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Thriving Community

CITY OF
FORT SASKATCHEWAN
ALBERTA

**Retail Market & Gap Analysis
Update**

November 2016

Prepared for City of Fort Saskatchewan

Prepared by Cushing Terrell Architecture Inc.

**CUSHING
TERRELL**
ARCHITECTURE INC.

RETAIL

Market & Gap Analysis

City of Fort Saskatchewan
Alberta



Member of
International Council
of Shopping Centers



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i PREFACE

Cushing Terrell Architecture Inc. (“Cushing Terrell”) was initially commissioned by the City of Fort Saskatchewan in August 2014 to conduct a Retail Market and Gap Analysis for the City. This initial study was carried out over the period August to January 2015.

Subsequent to this study, an update to the study was undertaken over the months of August and September 2016, to reflect evolving and changing market dynamics.

The objective of this study is to document in detail the City of Fort Saskatchewan’s current retail inventory and estimate the Trade Area retail expenditure profile across various retail categories/store types as an indication of retail inflow/outflow or also known as surplus/leakage.

Retail spending (i.e. demand) and the City’s retail inventory and its corresponding productivity (i.e. supply) was augmented and supported by a detailed Consumer Intercept Survey conducted by Keyfax Market Research to further identify gaps in Fort Saskatchewan’s current provision of shops and services.

This document is intended to assist the City of Fort Saskatchewan in promoting the community, working with developers and investors, as well as attracting new or expanding retailers/formats, retaining existing retailers and providing an overall identity/positioning strategy for future developments which could feature retail throughout the City’s various retail nodes and districts.

The 2016 update is to provide current demographic estimates and projections as well as update the City’s retail inventory and composition thereof.

Reference material for this report was obtained from, but not limited to: The City of Fort Saskatchewan, Commercial Real Estate Brokerage Firms (Colliers, Cushman Wakefield, Avison Young), Conference Board of Canada, Fort Saskatchewan Chamber of Commerce, Local Commercial Developers (Qualico, Haro Developments), International Council of Shopping Centers, Pitney Bowes, and Cushing Terrell Architecture Inc.

Cushing Terrell does not warrant that any estimates contained within the study will be achieved over the identified time horizons, but that they have been prepared conscientiously and objectively on the basis of information obtained during the course of this study.

Also, any tenant references made in the report are for illustrative purposes only and should not be taken as guarantees that they will locate in the City of Fort Saskatchewan, but rather that they could represent compatible “target” retailers.

This analysis was conducted by Cushing Terrell as an objective and independent party; and is not an agent of the City of Fort Saskatchewan.

As is customary in an assignment of this type, neither our name nor the material submitted may be included in a prospectus, or part of any printed material, or used in offerings or representations in connection with the sale of securities or participation interest to the public, without the expressed permission of Cushing Terrell Architecture Inc. or the City of Fort Saskatchewan

Cushing Terrell Architecture Inc. - November 2016

ii EXECUTIVE SUMMARY

INTRODUCTION

The objective of this study is to document in detail the City of Fort Saskatchewan's current retail inventory and estimate the Trade Area retail expenditure profile across various retail categories/store types as an indication of retail inflow/outflow or also known as surplus/ leakage.

LOCATION CONTEXT SUMMARY

The City of Fort Saskatchewan is a rapidly growing market with strong patterns of residential development supported by a retail infrastructure that has responded and continues to respond in step with new demand as the market has grown. It is also the closest urban centre to Alberta's Industrial Heartland.

The City has all the necessary criteria to support retail opportunities, though these opportunities may not be represented necessarily by large format retailers for whom Fort Saskatchewan's regional context relative to new emerging major nodes such as Emerald Hills and Manning Park may not be as strong.

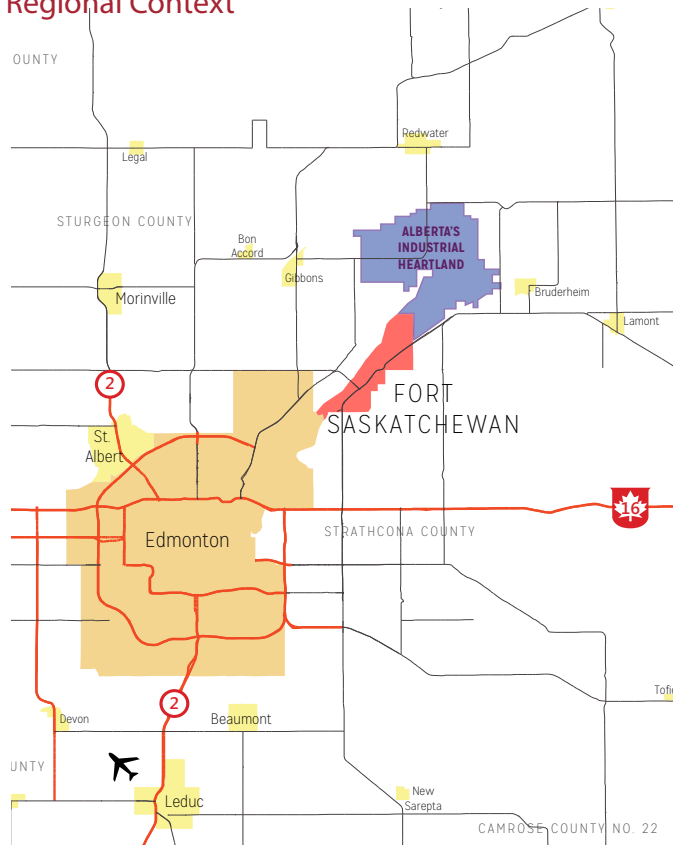
Traffic counts, which are in excess of 20,000 to 23,000 vehicles in and around new major nodes does bode well for attracting further branded tenants for whom other areas of the community may not be as busy.

RETAIL TRADE AREA SUMMARY

Both Emerald Hills and Manning Town Centre continue to be in the midst of developing significantly sized retail developments with strong clusters of destination and Comparison or Department Store Type Merchandise (DSTM). Each of these projects has Fort Saskatchewan as part of their Primary Trade Area and thus it would be difficult for the City of Fort Saskatchewan to compete directly against these emerging strong retail nodes. Therefore, the Retail Trade Area for Fort Saskatchewan must be realistic and not overstate the area against which it will compete.

Accordingly, the Retail Trade Area for the City of Fort Saskatchewan is a reflection of the competitive influences as well as a realization that residents of Fort Saskatchewan and the communities north, west and east will still like the convenience and accessibility that Fort Saskatchewan provides for a critical mass of more necessity-based merchandise, while not discounting the need for more essential comparison items.

Regional Context





EXECUTIVE SUMMARY

The Trade Area Demographic Profile illustrates a very strong local trade area that will grow from an estimated 38,700 in 2016 to approximately 46,000 over the next decade. It is plausible that even this growth could be exceeded if and/or as the City's growth strategy is reviewed.

Fort Saskatchewan's strengths lie in its demographics, which are substantiated by a significant household income (\$120,000 2016 estimate), which is above the regional and provincial averages (\$107,000 & \$119,000 respectively).

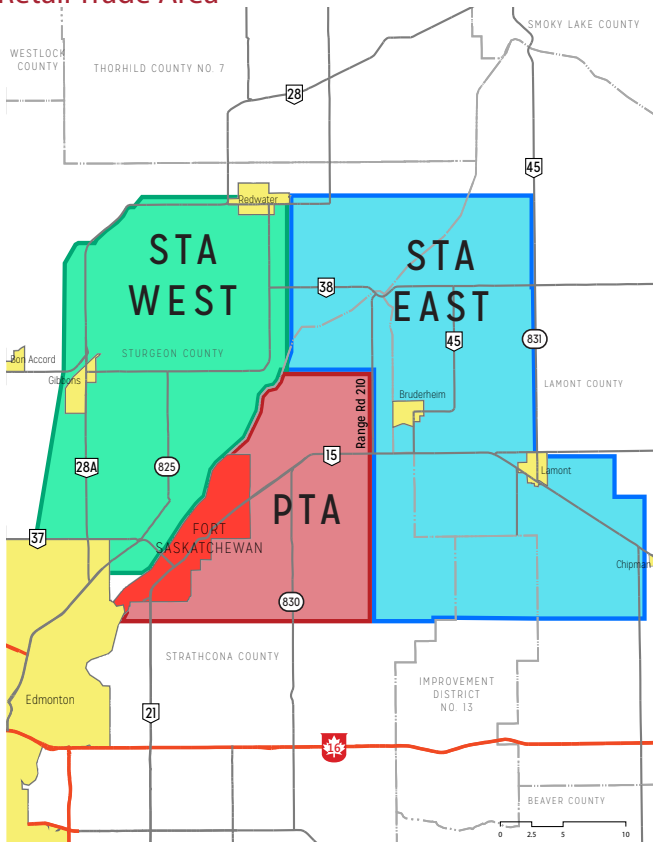
Secondly, the Trade Area has a strong, dynamic young family profile who are both mobile in their shopping patterns, yet are increasingly seeking opportunities to spend their money closer to home for more frequent purchases.

Overall, Fort Saskatchewan represents a \$550 million retail market (YE 2016 estimate) in which categories such as Grocery, Automotive/RV and Restaurants, Clothing/Apparel & Footwear represent significant spending segments.

RETAIL SUPPLY SUMMARY

The inventory for the City of Fort Saskatchewan illustrates a community-oriented retail offering that provides essential shops and services for residents of Fort Saskatchewan as well as populations within an approximate 15 - 20 minute drive, primarily north, northwest and east of the City.

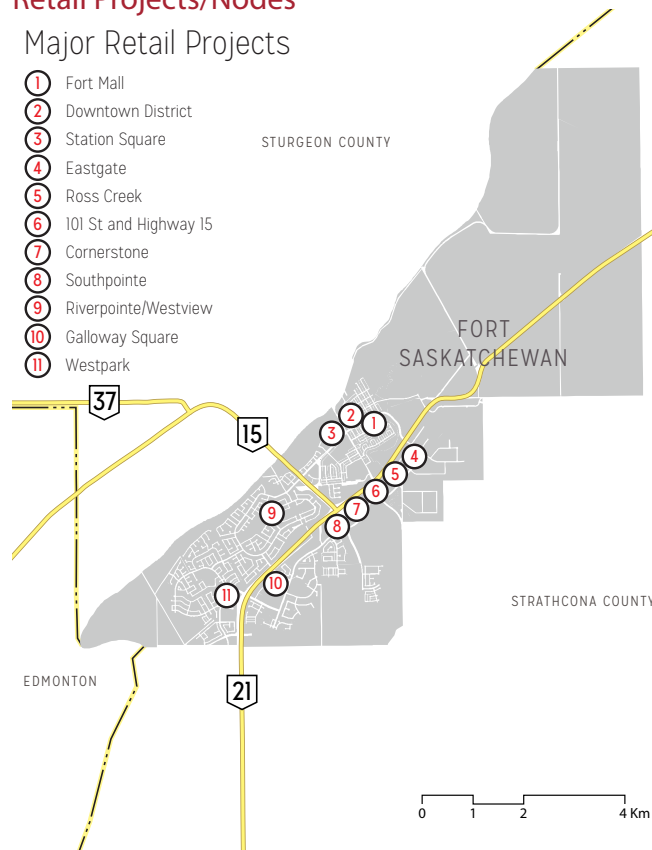
Retail Trade Area



Retail Projects/Nodes

Major Retail Projects

- ① Fort Mall
- ② Downtown District
- ③ Station Square
- ④ Eastgate
- ⑤ Ross Creek
- ⑥ 101 St and Highway 15
- ⑦ Cornerstone
- ⑧ Southpointe
- ⑨ Riverpointe/Westview
- ⑩ Galloway Square
- ⑪ Westpark



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EXECUTIVE SUMMARY

Retail Floorspace Demand versus Supply for Total Retail Trade Area

2016 (Year End Est.)			
Retail Spending by Merchandise Category	Total Floorspace Demand (sf)	Current City Retail Inventory (sf)	Total Residual Demand (sf)
Grocery & Specialty Foods	176,364	181,075	-4,711
Pharmacy	18,347	28,529	-10,183
Alcohol & Tobacco	48,277	50,426	-2,150
Personal Services	65,049	138,712	-73,663
Clothing & Apparel	54,944	84,211	-29,267
Footwear	15,868	4,741	11,128
Jewelry & Accessories	3,896	6,019	-2,122
Health & Beauty	15,937	34,961	-19,024
Home Furnishings & Accessories	33,335	19,744	13,591
Home Electronics & Appliances	23,758	38,301	-14,543
Home Improvement & Gardening	33,648	120,919	-87,271
Books & Multimedia	5,976	2,403	3,574
Sporting Goods & Recreation	9,435	22,781	-13,346
Toys & Hobbies	10,037	13,936	-3,899
Miscellaneous Specialty	31,726	83,700	-51,974
Full-Service F&B	28,629	76,645	-48,016
Limited Service F&B	16,039	59,768	-43,729
Entertainment & Leisure	39,141	63,119	-23,978
Auto Parts & Accessories	16,981	65,798	-48,817
Auto/RV/Motorsports Dealership	86,788	57,400	29,388
TOTAL RETAIL CATEGORIES ONLY	734,175	1,153,187	-419,012

Retail Spending Inflow / Outflow Estimates

Merchandise Category	Est. Current Annual Sales by Category (SUPPLY)	Est. Fort Saskatchewan Expenditure Potential 2016 (DEMAND)	Fort Saskatchewan Outflow / Inflow Estimates	Fort Saskatchewan Outflow / Inflow Factor
Grocery & Specialty Foods	\$103,721,599	\$83,075,400.19	\$20,646,199	11.1
Alcohol & Tobacco	\$13,295,001	\$8,598,610.50	\$4,696,390	21.5
Pharmacy	\$33,026,130	\$19,730,876.78	\$13,295,253	25.2
Personal Services	\$36,557,464	\$17,176,991.82	\$19,380,472	36.1
Clothing & Apparel	\$19,984,681	\$28,053,121.71	-\$8,068,440	-16.8
Footwear	\$1,261,648	\$8,342,051.39	-\$7,080,403	-73.7
Jewelry & Accessories	\$4,206,539	\$4,886,199.12	-\$679,660	-7.5
Health & Beauty	\$12,372,834	\$7,956,941.75	\$4,415,892	21.7
Home Electronics & Appliances	\$11,670,047	\$21,911,213.72	-\$10,241,167	-30.5
Home Furnishings & Accessories	\$8,440,049	\$32,919,514.36	-\$24,479,466	-59.2
Home Improvement & Gardening	\$39,643,018	\$8,952,854.28	\$30,690,163	63.2
Books & Multi-Media	\$615,563	\$5,807,047.96	-\$5,191,485	-80.8
Sporting Goods & Outdoor Recreation	\$5,686,751	\$4,560,971.33	\$1,125,780	11.0
Toys & Hobbies	\$3,026,751	\$3,902,693.63	-\$875,943	-12.6
Specialty Retail	\$16,317,761	\$11,565,735.92	\$4,752,025	17.0
Full Service F&B	\$27,515,773	\$12,295,447.98	\$15,220,325	38.2
Limited Service F&B	\$29,769,081	\$11,349,644.29	\$18,419,437	44.8
Entertainment & Leisure	\$10,819,683	\$15,337,606.44	-\$4,517,924	-17.3
Auto Parts & Accessories	\$22,155,109	\$6,712,212.77	\$15,442,897	53.5
Auto/RV/Motorsports Dealership	\$13,700,677	\$59,423,714.18	-\$45,723,037	-62.5
VACANT				
TOTAL	\$413,786,157	\$372,558,850	\$41,227,307	5.2



EXECUTIVE SUMMARY

Overall, the City's inventory has grown substantially over the past few years to a point now whereby the City should exercise caution so as to not be over-retailed in categories that could negatively impact areas such as Downtown.

The City has an estimated retail inventory of almost 1.19 million sq. ft. which includes vacancy of less than 4% which suggests a healthy retail environment.

RETAIL DEMAND SUMMARY

Total demand for floorspace in the City of Fort Saskatchewan attributable to residents of the Primary and Secondary Trade Areas is estimated at approximately 735,000 sq. ft.

When compared against the current City's occupied retail inventory or supply at 1.15 million sq. ft., the difference between demand and supply equates to almost 420,000 sq. ft. of retail space. In other words, the city has 420,000 sq. ft. more retail space than current demand warrants.

If one factors into the equation forecasted population growth in the total trade area of approximately 7,300 over the next decade to 2026 (the majority of which will be in the City of Fort Saskatchewan), then estimated future floorspace demand could grow by approximately 185,000 to 220,000 sf (if applying per capita ratios of 25 to 30 sf per capita).

When factoring future demand against the current negative residual demand, the forecasts suggest the City should focus its retail tenant recruitment strategy on specific tenants and merchandise categories that exhibit strong retail sales inflow potential. Examples include Grocery, Pharmacy and Food & Beverage.

This also applies to very specifically targeted comparison merchandise tenants who may be prepared to have a store in Fort Saskatchewan as well as Strathcona County and Northeast Edmonton.

Fort Saskatchewan's spending reveals a pattern in which more day-to-day types of categories generate inflow and surplus sales and could thus be targeted by retailers.

Conversely, the categories exhibiting outflow are all the types of categories that people are prepared to drive 30 - 45 minutes to access, which brings into play a wide array of projects that even includes South Edmonton Common and West Edmonton Mall. The northeast component of the Anthony Henday will only increase accessibility to areas like West Edmonton Mall.

Given Fort Saskatchewan's retail trade area demographics and spending attributes, specific target categories include Grocery, Pharmacy, Personal Services, Toys & Hobbies, Full & Limited Service F&B, Health & Beauty.

A market like Fort Saskatchewan in which inflow exists for specific categories and where it would be difficult to provide a comparison offering that could be competitive in the market is more poignant in that retailers can have the confidence in knowing that demand is already present in a market.

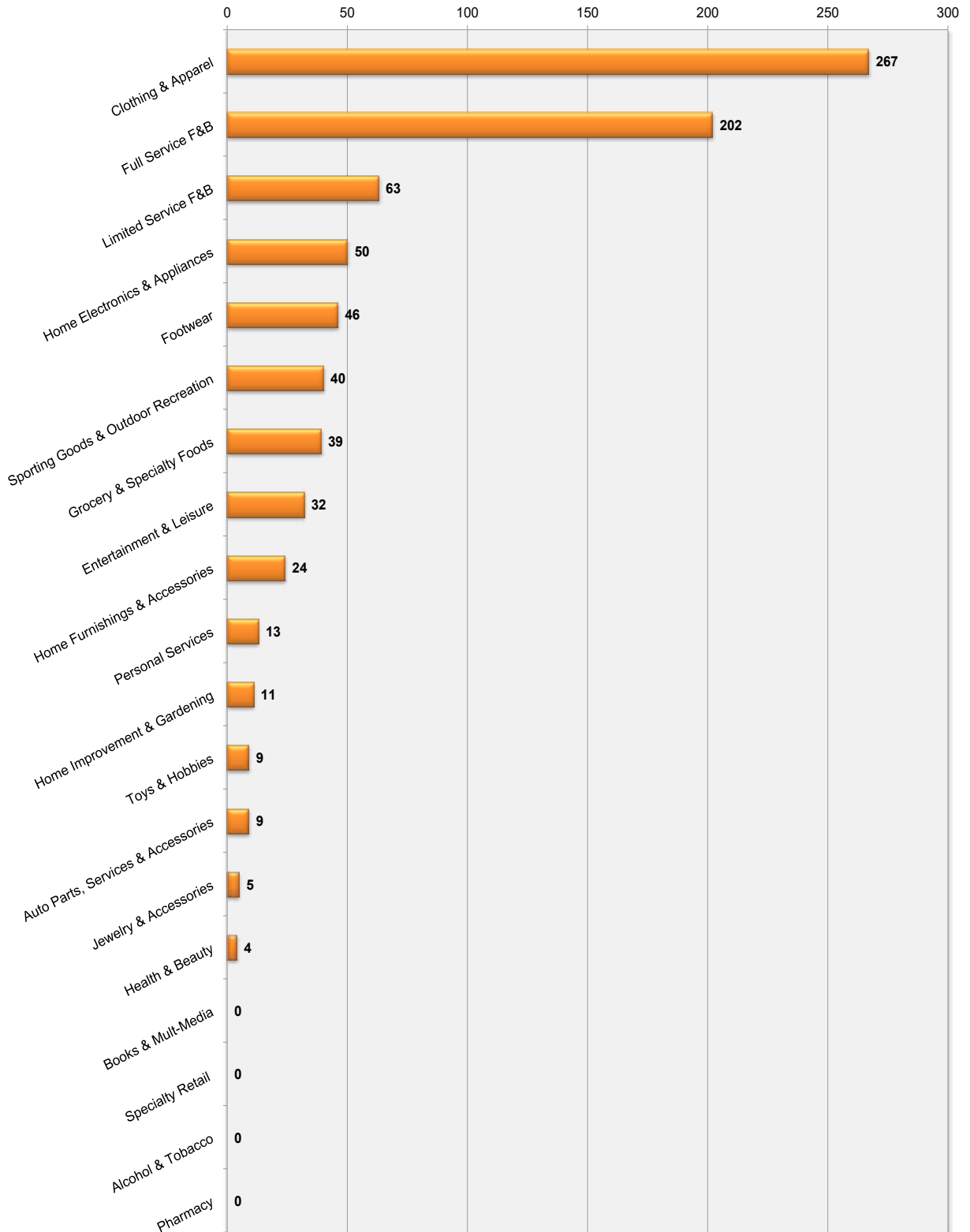
Fort Saskatchewan has an estimated net sales inflow of only \$41 million and does a very good job of retaining and attracting Convenience spending from its Trade Area with a net inflow of \$58 million.

Similarly, Fort Saskatchewan garners strong inflow from Limited Service Restaurants (\$18.4 million). However, Fort Saskatchewan's penetration of the Full-Service Restaurant category could be stronger.



EXECUTIVE SUMMARY

Types of Stores Desired in Fort Saskatchewan





EXECUTIVE SUMMARY

Fort Saskatchewan's major leakage occurs in Automotive/RV Dealers (\$45.7 million), Clothing & Footwear (\$15.1 million) and Home Furnishings (\$24.5 million). These are categories Fort Saskatchewan will be hard pressed to compete with and thus may not be priorities for targeting.

CONSUMER SURVEY SUMMARY

The Consumer Intercept Survey yielded findings that reinforce the more localized trade area for the City of Fort Saskatchewan.

The majority of respondents indicated a desire to have more Clothing & Footwear, Full Service Restaurants and Grocery. These particular categories were not only identified as specific categories, but the spending patterns and importance ratings of the respondents validated these sentiments.

Respondents identified a number of recognized restaurant and retailer brands. While Fort Saskatchewan is well positioned to attract many of the full and limited service restaurants identified, caution should be exercised as it relates to the list of comparison retailers. Many of the desired comparison retailers are mid to larger sized formats who are likely to be drawn to new developments at Emerald Hills and/or Manning Town Centre.

As such, Fort Saskatchewan should use the consumer survey trends that suggest targeting smaller more value-oriented retailers that could infill existing retail nodes, thus not necessitating another new large retail node or nodes.

The types of tenants sought by respondents combined with their spending patterns further suggest that the most compatible locations that can fulfill retailer site location requirements will likely fall in the Central and South nodes and to a lesser degree the Downtown.

The redevelopment of the Fort Mall should however provide a significant and viable option for tenants looking for newer space at potentially more affordable rates.

The Downtown area will continue to face external pressures resulting from continued growth on the fringe of the City. The Downtown is still recognized as a key node that can accommodate future tenant opportunities, particularly in the specialty retail, food & beverage categories and personal services categories.

CONCLUSION

Since 2014, when the original study was undertaken, Fort Saskatchewan has been resilient in maintaining moderate retail growth. The population of the Total Trade Area, driven by growth in the city of Fort Saskatchewan has continued.

The temporary workforce or "shadow population" has declined from previous estimates of 2,500 plus to approximately 1,250 or about half or less.

As with other markets affected by a drop in oil prices, consumer confidence and retail-specific spending has slowed, but this is expected to slowly rebound over the next few years.

A lower spending, within the Trade Area has also resulted in an estimated and corresponding decline in retail sales productivity for retailers in Fort Saskatchewan.

There has however been an introduction of new tenants in the market since 2014, with notable brands such as Canadian Brewhouse, Shoppers Drug Mart, Wendy's, Montana's and Kal Tire, as well as a second Shoppers Drug Mart.

The majority of new retail businesses in Fort Saskatchewan over the past two (2) years have however been local, which is a very positive sign of strength and resilience.

As the City grows, even in the face of weaker consumer confidence and spending, it is ever more important that the City recognize and prioritize retention and attraction for Downtown businesses.

Although residual demand continues to be in the negative (~ 420,000 sf), the recent economic challenges have shown a greater desire for convenience spending to be more localized. This has been manifest in less outflow overall than in 2014, particularly for convenience categories where Trade Area residents are staying closer to home.

Alternatively, bigger ticket items such as Auto and Recreational Vehicles as well as Comparison categories (or Department Store Type Merchandise DSTM) still exhibit outflow dollars from the community and this will likely be the case over the next 5-10 years.

Convenience and Food & Beverage categories will continue to be strong as will Specialty Retail, Auto Parts and Personal Services, or those categories for whom distance and time are a factor.

Consequently, the City of Fort Saskatchewan should look to the following considerations as it relates to guiding the retail prospects of the City over the next decade:

- Ensure that retail growth does not come at the expense of the Downtown.
- Promote the infill of existing new and developing retail nodes as a way of cultivating critical mass and critical mix.
- Prioritize key target categories and tenants that can benefit from the sales inflow as well as curbing some outflow of specific categories.
- Avoid trying to compete with the major retail nodes at Emerald Hills and Manning Town Centre, but rather solidify the City's role as a strong service centre, until such time as the City's population itself could warrant development at that magnitude.
- Market the City's offering of shops and services to the identified north, northwest and eastern parts of the trade area to attract and retain more of their spending.

1 INTRODUCTION

1.1 SCOPE OF STUDY & PROJECT BACKGROUND

Cushing Terrell Architecture Inc. (“Cushing Terrell”) was initially commissioned by the City of Fort Saskatchewan in August 2014 to conduct a Retail Market and Gap Analysis for the City. This initial study was carried out over the period August to January 2015.

Subsequent to this study, an update to the study was undertaken over the months of August and September 2016, to reflect evolving and changing market dynamics.

The objective of this study is to document in detail the City of Fort Saskatchewan’s current retail inventory and estimate the realistic Trade Area and its inherent retail expenditure profile across various retail categories/store types as an indication of retail inflow/outflow or surplus/leakage.

1.2 REPORT STRUCTURE

Cushing Terrell conducted initial on-the-ground research in September 2014 supplemented by research gathered during the overall period August 2014 to December 2014 and updated with information provided by the City in August 2016 to gain a firm understanding of existing and future retail projects and prospects in Fort Saskatchewan as well as new, vacant and closed retailers since 2014. The purpose of this research was to establish a solid foundation and baseline for determining the depth of retail opportunity and associate gaps in the market provision of shops and services and to whom such gaps could be targeted.

In addition to this, the 2016 information has been used to update the original tables, charts, and statistics to convey the current direction of the retail market in Fort Saskatchewan. General market research was also conducted to further understand the retail, social, and economic changes taking place within the community.

To respond to the work program process, the document is presented in the following sections:

Section 1 - Introduction:

Introduces the study process and structure.

Section 2 - Location Analysis & Site Context:

Lays out the important regional and local context of the City of Fort Saskatchewan as a location that targeted retailers could express interest.

Section 3 - Retail Trade Area Profile:

Identifies and defines the Primary and Secondary Retail Trade Areas and documents the population and expenditure profiles generated from within these respective trade areas, against which estimates of floorspace demand can be attributed. Given Fort Saskatchewan’s status as an Oil & Gas hub, the smaller yet nonetheless important temporary/part-time resident base was also profiled.

Section 4 - Retail Market Supply:

Assesses the location and characteristics of Fort Saskatchewan’s current nodes of retail activity (“supply”), including developing or future planned retail sites. Fieldwork assessments included identifying and quantifying the entire City’s retail inventory by node, retailer and merchandise category.



Photo credit: Cushing Terrell Architecture Inc. 2014



Section 5 – Retail Demand & Gap Analysis:

Trade Area spending and sales productivities were estimated resulting in “demand” associated with each retail category. The demand estimates were then applied against supply to estimate the magnitude of inflow and outflow of retail on a category-by-category basis.

Section 6 – Consumer Intercept Survey:

A Consumer Intercept Survey was conducted by Keyfax Market Research in which the full-time and part-time residents of Fort Saskatchewan and surrounding communities were interviewed. An in-person questionnaire tool was used to ascertain shopping patterns and consumer preferences for retail tenants and formats in the City of Fort Saskatchewan, along with their current spending habits and importance ratings for the types of new retail categories that the City could pursue to enhance the offering and retain expenditure within the community.

Section 7 – Conclusion:

Conclusions highlight and summarize the most salient Market Analysis findings as well as missing merchandise categories and identify a roster of potential market-compatible retailers whose typical site selection criteria match the trade area demographics and locational attributes of Fort Saskatchewan.

1.3

SOURCES OF INFORMATION

During the course of this study, a number of information resources were used to quantify retail market supply and demand conditions.

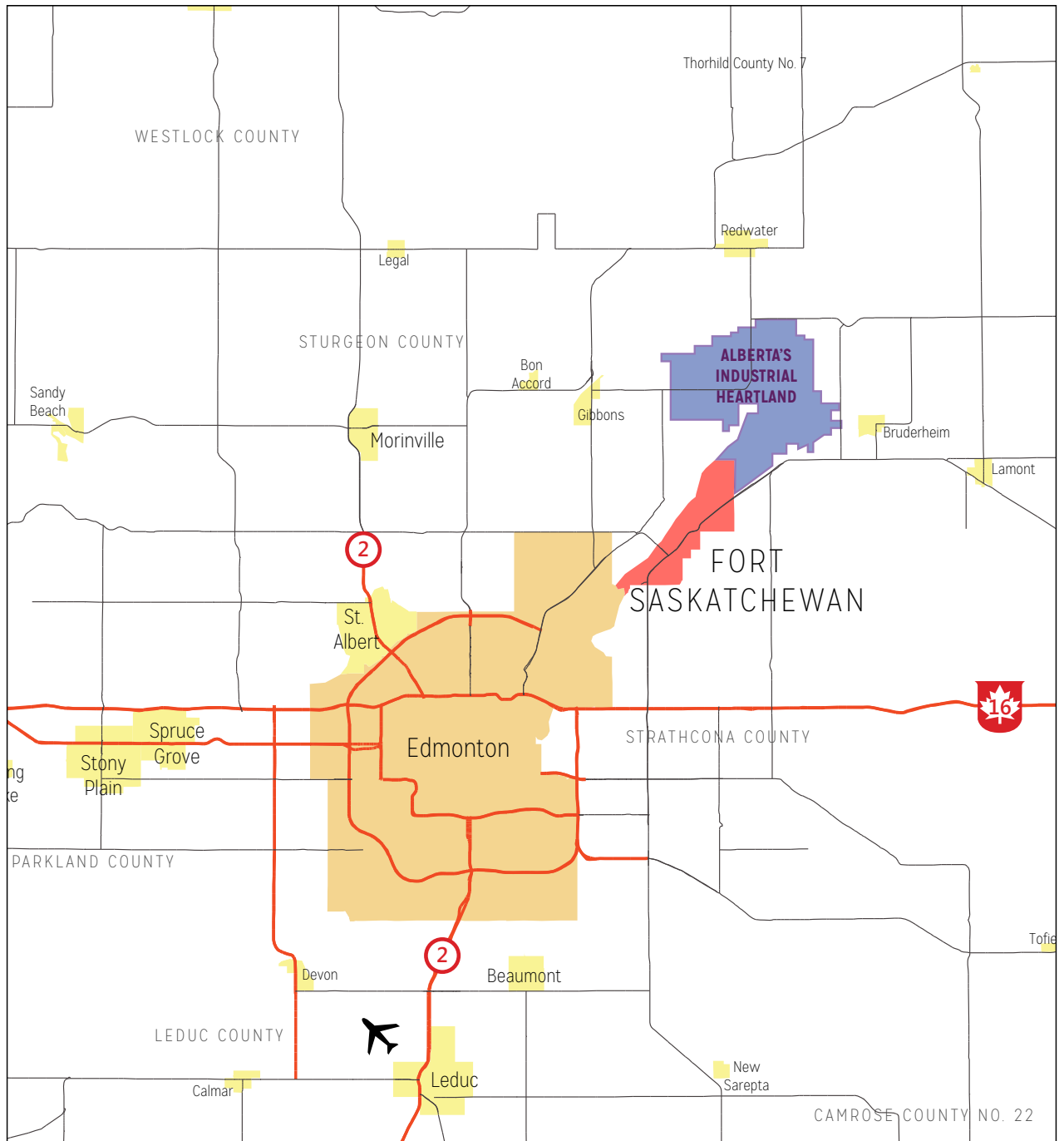
In addition to primary and secondary research, Consumer Intercept Interviews were also conducted to further supplement the retail supply and leakage quantification analysis. The following sources of information were used in this Retail Market & Gap Analysis:

- City of Fort Saskatchewan Growth Study, 2015
- City of Fort Saskatchewan Strategic Plan 2014-2017
- City of Fort Saskatchewan Municipal Development Plan, 2010-2030
- City of Fort Saskatchewan Downtown Area Redevelopment Plan, 2009
- City of Fort Saskatchewan Municipal Census, 2014
- City of Fort Saskatchewan Land Use Bylaw
- Alberta Ministry of Transportation, Highways 1 to 986 Traffic Volume History 2003-2013
- Environics Analytics, Western Canada 2013
- Keyfax Market Research Consumer Intercept Survey, September 2014
- Cushing Terrell Architecture Inc. Detailed Retail Inventory Fieldwork, September 2014

Cushing Terrell would like to thank the following firms and organizations from whom additional information was obtained to provide supplemental retail development, project profiles market, and tenant information:

- Avison Young
- Qualico Developments
- Haro Developments Ltd. (and Square Root Architecture Ltd.)
- Springwood/CREIT
- International Council of Shopping Centers -Alberta and Metro Edmonton Non-Anchored Mall Tenant Retail Sales Productivities, 2014
- Conference Board of Canada Metropolitan Outlook, Summer 2014
- Statistics Canada, 2014
- Fort Saskatchewan Chamber of Commerce
- Colliers, Fort Saskatchewan Demographics & Retail Potential, 2011
- Colliers International
- Cushman Wakefield

Figure 2.1
CITY OF FORT SASKATCHEWAN CONTEXT MAP



2 LOCATION & CONTEXT

2.1 INTRODUCTION

Strong locational factors are an essential foundation to retail success, and an understanding of these factors can help create the necessary conditions for attracting and retaining retail businesses in a community. This section identifies Fort Saskatchewan's regional and local characteristics as they relate to the attraction and retention of retail businesses and merchandise categories.

The analysis begins with a macro study of the Fort Saskatchewan regional context as it relates to surrounding counties and cities/towns therein, as well as the City of Edmonton.

2.2 REGIONAL CONTEXT

The City of Fort Saskatchewan is approximately 30 km northeast of Edmonton. Being at the gateway to Alberta's Industrial Heartland (AIH), the City is well positioned to benefit from economic growth related to industrial development, particularly that related to the Oil & Gas Industry. The City also benefits from its proximity to downtown Edmonton, a 30-minute drive away. This proximity is a benefit for a commuting workforce, but also creates challenges for providing a depth of retail opportunities.

Numerous highways connect Fort Saskatchewan to the population and industrial centres necessary to support potential multi and chain store retail operations for whom timely access to markets forms an essential part of their store network strategy.

The City conservatively services a trading area of almost 39,000 people spanning the City itself and neighbouring counties such as Sturgeon, Bruderheim, Gibbons, Thorhild and Lamont.

Though Fort Saskatchewan is not considered a regional-serving destination, it nonetheless serves as a critical and convenient catchment for shops and services for towns such as Lamont, Bruderheim, Redwater, Gibbons and Bon Accord (refer to **Figure 2.1**).

2.3 MUNICIPAL DEVELOPMENT PLAN

The City's Municipal Development Plan (MDP) addresses long-term commercial growth in the Future Land Use Plan. The Future Land Use Plan addresses growth only within the municipal boundary, and in general the plan directs/encourages growth to the east, southeast and south. Major growth and development on lands to the north and west is limited by existing heavy industrial uses and the North Saskatchewan River respectively.

The Future Land Use map designates new growth areas with the "Developing Communities" (DCA) designation. Policies for the DCA land use that are relative to new retail development include a desire for a mix of residential and commercial uses as well as the need for neighbourhood-serving commercial. This suggests smaller format retail or offices is the City's desired commercial use for DCA areas. This type of land use is generally consistent with what demand would dictate.

The City generally aims to direct new large-format retailers to areas that have attracted existing large retailers, such as Cornerstone and Southpointe. Such areas are designated as "Commercial" (C) land use.

With respect to retail development in this C-designated area, the MDP states, "*The City will concentrate future highway commercial development in these areas...*", preserving land in other areas for neighbourhood-serving commercial uses.

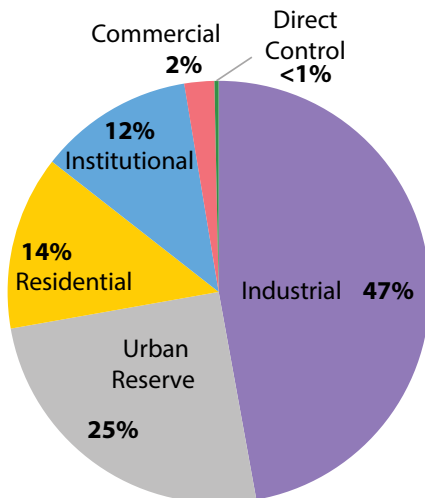
It is the intent of the MDP to intensify the retail uses in this area if possible. The Future Land Use Plan does not suggest that existing Commercial areas will expand into the surrounding “General Urban Area” land use, which is intended to be a more neighbourhood-oriented district.

As is stated in the MDP, and further validated by market analysis and inventory fieldwork, the Downtown area and former shopping malls, including Fort Mall, have become marginalized by the emergence of power centres over the past decade, particularly in the west side of the City.

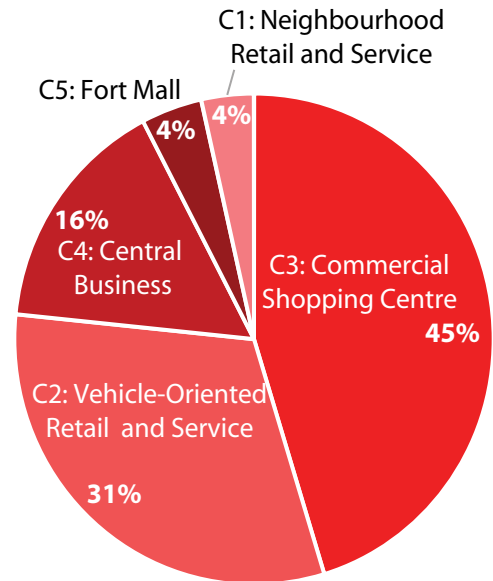
Certainly the Downtown may not be the first destination of choice for new retailers, particularly those with a brand affiliation, **but the role of the Downtown is absolutely critical to providing opportunities for local retailers and entrepreneurs, as well as providing an identity for the city.**

The Future Land Use Plan designates the “Downtown” Land Use District as the focal point of commerce and community interaction in the city. Policies for Downtown largely reflect those in the Downtown Area Redevelopment Plan.

Land Use District Composition



Commercial Land Use District Composition



2.4 LAND USE BYLAW

The City’s Land Use Bylaw addresses commercial lands in “Part 6 - Commercial Land Use Districts”.

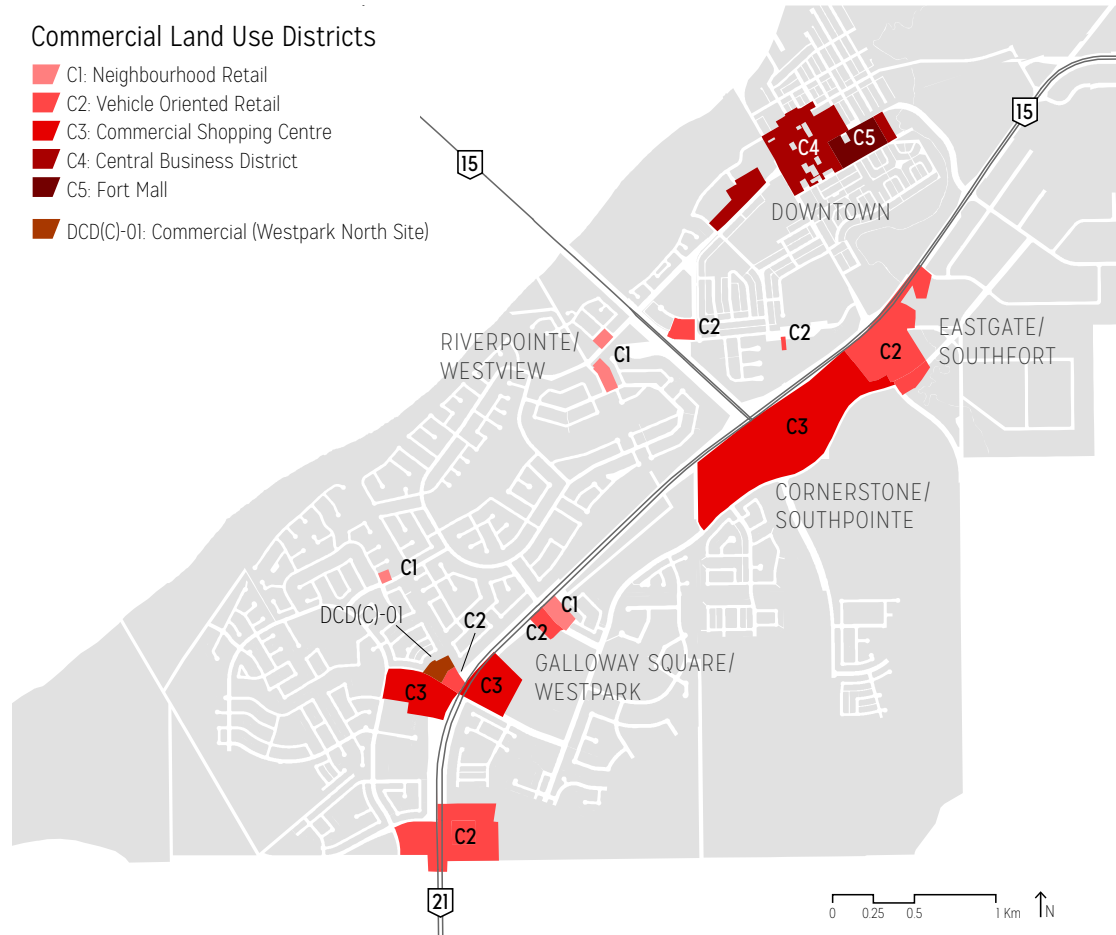
Although Commercially-zoned land comprises about two percent (2%) of all land use in Fort Saskatchewan, the Urban Reserve Land Use District represents areas that have potential for new growth (25%). As such, Urban Reserve areas adjacent to existing Vehicle Oriented Retail and Commercial Shopping Centre districts (Eastgate, Southpointe and the south entrance to the City) may have potential to absorb new commercial development, if and as demand warrants, though it must be important to ensure that any such development maintains compatibility with the City’s overall vision for retail retention, expansion and attraction.

2.5 STRATEGIC PLAN 2014-2017

The City’s Strategic Plan is a comprehensive plan to guide Fort Saskatchewan during the four years of 2014-2017. Goals include ensuring consistent and long term growth, including economic development that is diverse and beneficial for the community.

2

Figure 2.2
COMMERCIAL LAND USE DISTRICTS



2.6
COMMERCIAL LAND USE CONTEXT
Figure 2.2 shows the commercial lands in the City. The areas shown in red depict land currently zoned for Commercial Land Uses. The map illustrates concentrations of Commercial lands in which existing as well as major future commercial development are or may be situated.

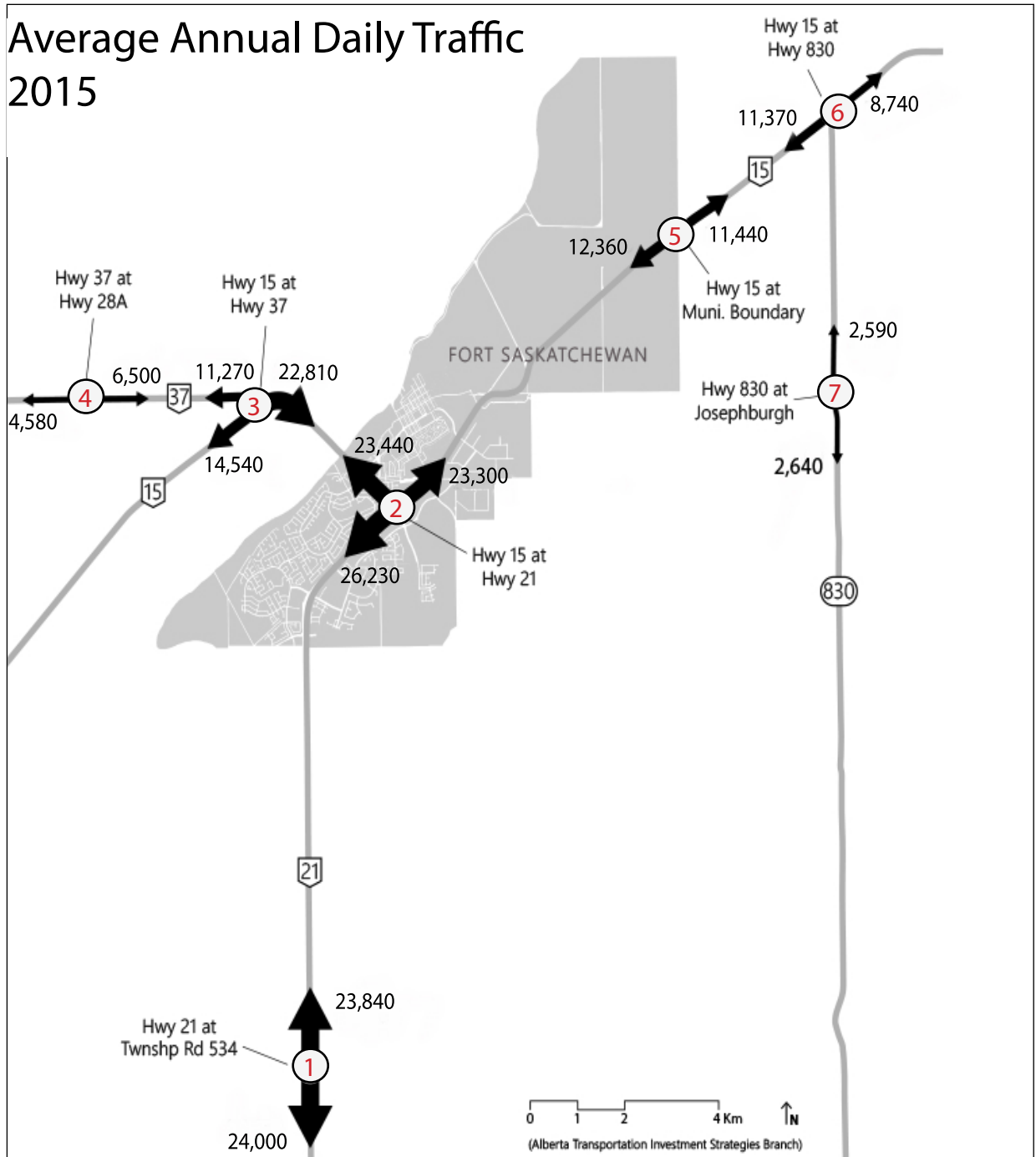
2.7
TRANSPORTATION CONTEXT
 One of the most significant aspects to successful commercial development relates to patterns of transportation. Most significant to retail businesses, the ability to be accessible as well as visible to high volumes of traffic is among their most major considerations.

For a localized market such as Fort Saskatchewan, a retail location relative to strong and accessible transportation patterns remains an important component, as illustrated by recent retail developments at the convergence of Hwy 21 & Hwy 15, where traffic counts are highest in the City.

Accordingly, **Figure 2.3** reveals the major high volume traffic corridors, which are located along Hwy 21, Hwy 15, Hwy 37 and Hwy 830.

The Alberta Ministry of Transportation provides traffic counts on major highways. Referring to **Figure 2.3**, the most recent 2015 traffic counts by the Province illustrated Average Annual Daily Traffic (AADT) at the following intersections:

Figure 2.3
CITY OF FORT SASKATCHEWAN TRAFFIC COUNTS
 (Source: Government of Alberta)



2

1) Hwy 21 at Township Rd 534

North on Hwy 21 = 23,840

South on Hwy 21 = 24,000

2) Hwy 15 at Hwy 21

North on Hwy 15 = 23,300

West on Hwy 15 = 23,440

South on Hwy 21 = 26,230

3) Hwy 15 at Hwy 37

East on Hwy 15 = 22,810

South on Hwy 15 = 14,540

West on Hwy 37 = 11,270

4) Hwy 37 at Hwy 28A

North on Hwy 28A = 10,320

South on 17th St. = 7,310

East on Hwy 37 = 6,500

West on Hwy 37 = 4,580

5) Hwy 15 at Municipal Boundary

North on Hwy 15 = 11,440

South on Hwy 15 = 12,360

6) Hwy 15 at Hwy 830

North on Hwy 15 = 8,740

South on Hwy 830 = 2,390

South on Hwy 15 = 11,370

7) Hwy 830 at Josephburgh

North on Hwy 830 = 2,590

South on Hwy 830 = 2,640

Traffic patterns closely mirror retail hot spots particularly in the central areas where the largest concentrations of traffic flow are in the range of 23,000 - 26,000 AADT, and for which regional traffic is important for larger format and "Power Centre" type uses.

Incoming traffic flows indicate there is some inflow from rural areas to the northwest, however inflow from the south and west is more significant. The Hwy 21 corridor connecting

Fort Saskatchewan to greater Edmonton is the highest trafficked corridor, which bodes well for attracting further retail interest, particularly that which is compatible with Fort Saskatchewan's trade area. However, it should be noted that the majority of this high traffic volume is likely more a commuting workflow than a destination shopping flow.

2.8

DEVELOPMENT & BUILDING PERMITS

Over the past several years, Fort Saskatchewan has seen consistent and steady growth in the number of Building Permits issued. While 2016 numbers are still not finalized, it will be of considerable significance to see the effect the current economic situation in Alberta has on the number of new developments in Fort Saskatchewan. A review of data on development and building permits in the City of Fort Saskatchewan over the last several years illustrates a sustained pattern of development activity.

As evidenced in **Figure 2.4**, over the period of 2009-2015, the City of Fort Saskatchewan has exhibited strength, especially in 2014 and 2015, with over 800 permits issued for all types of construction in each of those years. Currently, 2016's numbers are more consistent with the years prior to 2014 and 2015, as illustrated by around 487 permits currently issued for all types of construction. With the 2016 calendar year still not being complete, there is significant likelihood of this number further increasing.

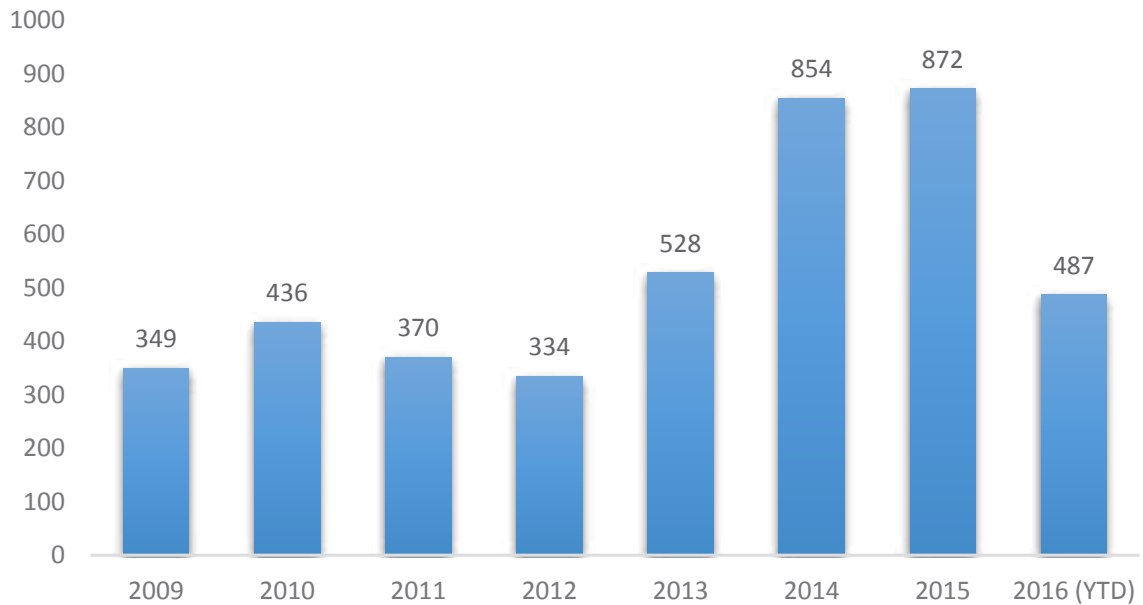
The value of the above noted Building Permits for the current year (2016) through September has amounted to \$47.85 million.

Currently in 2016, there have been 20 new construction starts for Commercial developments. Over the period of 2015, there were 44 total new construction starts for Commercial. Over the period 2006 to 2013 the average number of new construction starts for Commercial has been 3.5 per year.

Figure 2.4

CITY OF FORT SASKATCHEWAN NEW BUILDING PERMITS ISSUED 2009 - 2016

(Source: City of Fort Saskatchewan Residential, Institutional, Industrial & Commercial)



2

Residential building permits continue to be the primary type of development permits being issued: currently in 2016 the number is 432, with 2015 seeing 742, and 2014 having 776 permits issued for residential.

The importance of residential to retail development is significant, particularly for the development and feasibility of potential additional local or community scale developments.

Overall building permit data shows a growth dynamic that has been strong and steadily increasing over the last several years. With the recent shift in economic activity in Alberta, including the Fort Saskatchewan region, the 2016 numbers do potentially show a slowing of developments, while still being quite strong when looking at numbers historically.

This reinforces the strong growth dynamics of the Fort Saskatchewan market and also illustrates a trend towards a diversified development market as evidenced by the increasing number of multi-family permits which bodes well for future intensification of areas such as the Downtown where multi-family formats will be an integral part of any ongoing enhancement and revitalization.

2.9 SUMMARY & IMPLICATIONS

The City of Fort Saskatchewan is a rapidly growing market with strong patterns of residential development supported by retail infrastructure that has responded and continues to respond in step with new demand as the market has grown.

The City has all the necessary criteria to support retail opportunities, though these opportunities may not be represented necessarily by large format retailers for whom Fort Saskatchewan's regional context relative to new emerging major nodes such as Emerald Hills and Manning Park may not be conducive.

Traffic counts, which are in excess of 23,000 to 26,000 vehicles in and around new major nodes does bode well for attracting further branded tenants for whom other areas of the community may not be as lucrative.

As is often the case in retail, tenants will seek to find the best location that will allow them the opportunity to garner sales that can justify rents. In this regard, the City of Fort Saskatchewan as will be seen in **Section 4.0**, provides a range of options for local, regional, and national tenants.

The City continues to be in the midst of economic strength, driven by continued oil and gas exploration, but beyond that the City of Fort Saskatchewan itself has a diversified economy driven by the expansion of Alberta's Industrial Heartland, as well as the emergence of retail itself as an important economic driver.

Mobility to and within the City of Fort Saskatchewan and the various new residential communities being developed in the South and East is allowing for retailers to set up businesses in all nodes of the City including Downtown, where drive times within the city are mere minutes apart when compared to other more congested communities nearby.

With additional Commercial and Industrial developments under construction or planned with service-ready sites, the City is able to accommodate retailers, investors and developers with projects from neighbourhood to community-scale formats.

Figure 3.1
 CITY OF FORT SASKATCHEWAN RETAIL TRADE AREA



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3 RETAIL TRADE AREA PROFILE

3.1

INTRODUCTION

In order to establish a framework for quantifying retail demand and subsequent gaps in the provision of shops and services, it is necessary to delineate and identify the Trade Area from which the City of Fort Saskatchewan's retail sales are most frequently and likely to be sourced and generated.

The Trade Area recognizes drive times and profiles the demographics, spending attributes and competition, which collectively help to shape and inform the market to prospective tenant, developer and investor interests, and ultimately provides a rationalization for achievable market shares attributable to the Trade Area spending segments.

As a first step, a Trade Area was delineated to identify the geographic region from which regular patronage could be expected based on a series of boundary determinants.

The major considerations in delineating a Retail Trade Area are outlined in the following. These principles were applied to the City of Fort Saskatchewan to determine its current Trade Area, as well as to help sensitize future market share inputs from respective Trade Areas.

Retail Trade Area Determinants

- i. Transportation networks, including streets and highways, which affect access, travel times (**Figure 3.1**), commuting and employment distribution patterns;
- ii. Major infrastructure projects both planned or under development which will affect future travel patterns;
- iii. The development vision, including an understanding of its site characteristics and potential target audience;
- iv. The local and regional competitive environment, present and future;
- v. The City's proposed generative uses (retail, cultural, civic, etc.) and their relationship within the wider market;
- vi. Significant natural and man-made barriers (e.g. water features, highways and industrial areas);
- vii. De facto barriers resulting from notable socioeconomic differentiation;
- viii. Patterns of existing and future residential and commercial development; and
- ix. Economic realities, such as provincial retail sales taxes.



Photo credit: Cushing Terrell Architecture Inc. 2014

3

As mentioned previously, a Trade Area is the geographic region from which the City of Fort Saskatchewan will draw regular patronage from local and regional residents.

Identifying the likely Trade Area is important to understanding the total market potential available to current and future tenants as generated by the local and regional residential base as well as its particular demographic and spending nuances. This provides clues as to the type of retail tenants that are compatible, the amount of retail floorspace supportable in the market, and the current inflow or outflow of retail sales and for which categories such inflow or outflow exists.

A Trade Area is typically subdivided to provide a more refined analysis of the City's retail opportunity.

These subdivisions include a Primary Trade Area from which the majority of retail sales originate, and a series of Secondary Trade Areas, each of which is specifically delineated based on factors such as transportation, population, geographic barriers, etc.

For this particular study, the Retail Trade Area shown in **Figure 3.1** has been cross-referenced and subsequently validated by the Consumer Intercept Survey, which is documented in **Section 6.0**. This Consumer Intercept Survey used postal codes of respondents to confirm and modify the Trade Area as depicted.

The resulting Trade Area for the City of Fort Saskatchewan comprises the following Primary and Secondary Trade Areas:

Primary Trade Area (PTA) includes the City of Fort Saskatchewan and the outlying small towns east of the North Saskatchewan River and within an approximate 10 minute drive time, such as Bruderheim and Josephburg.

Secondary Trade Area West (STA West) includes the residents of Sturgeon County west of the North Saskatchewan River up to and including the outlying smaller communities such as Gibbons and Redwater.

Secondary Trade Area East (STA East) is represented by the smaller towns located east and north of the PTA and includes towns such as Lamont, Beaverhill and other hamlets within Lamont County.

Part Time residents for whom Fort Saskatchewan is a temporary home while they work in the Oil & Gas Industry are another "untapped" component of the Retail Trade Area. Although not quantified as part of the full-time residential base, they nonetheless will be profiled in terms of their estimated retail potential and the types of shops and services that they utilize in the city.

3.2

POPULATION PROJECTIONS

Using data sources that include the City of Fort Saskatchewan, which recently completed a Municipal Census (2016), Statistics Canada, and Pitney Bowes, population estimates and growth forecasts were tabulated for each of the identified trade areas and further compared to the Edmonton and Alberta averages, where applicable.

Table 3.1

TRADE AREA POPULATION PROJECTIONS SUMMARY 2016 TO 2026

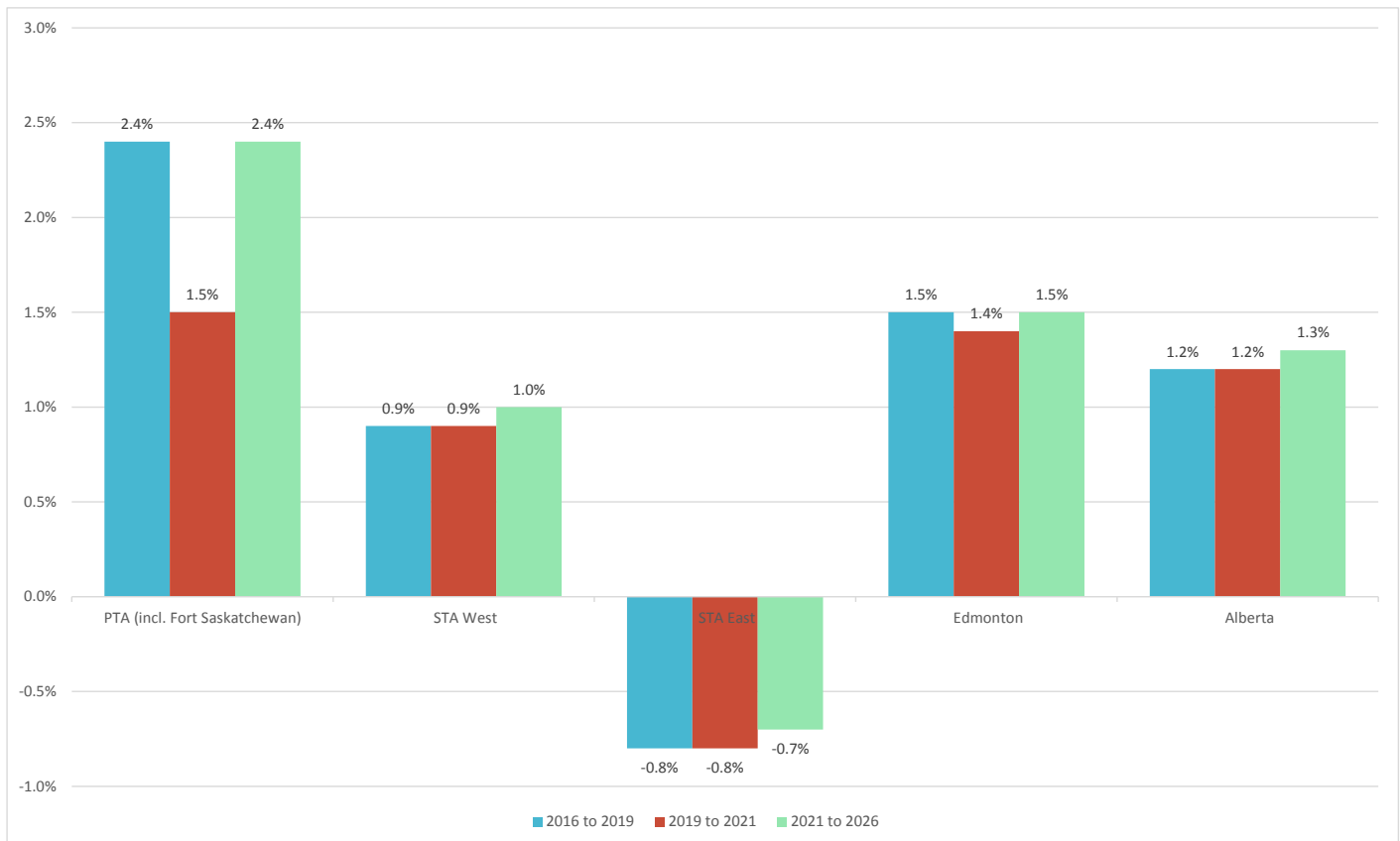
(Source: City of Fort Saskatchewan, Pitney Bowes 2016)

2016 Estimates and Projections Population Trends	PTA (incl. Fort Saskatchewan)	STA West	STA East	Fort Saskatchewan	Edmonton	Alberta
Total Population						
2011 Census*	20,768	7,723	4,686	19,800	844,116	3,790,185
2016 estimated	25,694	8,409	4,641	24,569	948,112	4,191,020
2019 projected	27,595	8,643	4,534	26,412	991,107	4,346,671
2021 projected	28,864	8,799	4,463	27,627	1,019,682	4,450,158
2026 projected	32,472	9,260	4,307	31,108	1,098,020	4,743,508
Change in Population (persons)						
2011 to 2016	4,926	686	-46	4,769	103,996	400,835
2016 to 2019	1,901	234	-107	1,843	42,995	155,651
2019 to 2021	1,269	156	-71	1,215	28,575	103,487
2021 to 2026	3,608	460	-155	3,481	78,338	293,350
Change in Population (percent)						
2011 to 2016	23.7%	8.9%	-1.0%	24.1%	12.3%	10.6%
2016 to 2019	7.4%	2.8%	-2.3%	7.5%	4.5%	3.7%
2019 to 2021	4.6%	1.8%	-1.6%	4.6%	2.9%	2.4%
2021 to 2026	12.5%	5.2%	-3.5%	12.6%	7.7%	6.6%
Rate of Change in Population (percent per year)						
2011 to 2016	4.4%	1.8%	-0.2%	4.4%	2.5%	2.1%
2016 to 2019	2.4%	0.9%	-0.8%	2.4%	1.5%	1.2%
2019 to 2021	1.5%	0.9%	-0.8%	1.5%	1.4%	1.2%
2021 to 2026	2.4%	1.0%	-0.7%	2.4%	1.5%	1.3%
<i>* Population counts have been adjusted by MapInfo for census undercounts.</i>						

Figure 3.2

RETAIL TRADE AREA POPULATION GROWTH RATES

(Source: City of Fort Saskatchewan, Pitney Bowes 2016)



3

46,000+ BY 2026

TOTAL TRADE AREA POPULATION

While using the City's most recent data for sensitizing projections, for the purposes of this study Cushing Terrell uses the 2016 Pitney Bowes Western Canada data as a baseline, wherever possible.

Using this data allows for better tabulation of the data at the block level for more accurate delineations. While having the most current data projections, it also allows for comparisons across other municipalities and at the Provincial level.

Table 3.1 provides a breakdown of the Trade Area Population in which the Primary Trade Area is shown to include the municipal boundaries of the City of Fort Saskatchewan. The purpose of this inclusion/exclusion was to allow for the City of Fort Saskatchewan to be isolated as its own demographic subset, thereby allowing for a more refined analysis of the demographics and spending patterns of the City's residents.

Referring to **Table 3.1**, the Total Trade Area (PTA + STA W + STA E) population is estimated to be just over 38,000 in 2016. This population is forecast to exceed 40,000 by 2019 and 46,000 by 2026.

Within the Total Trade Area, the Primary Trade Area (PTA), which as noted includes the City of Fort Saskatchewan, is estimated to have a population of just under 26,000 and is projected to approach 32,500 by 2026.

Thus, it can be seen the Trade Area's future population growth (**Figure 3.2**) will be driven by the Primary Trade Area and more specifically by the City of Fort Saskatchewan itself.

Over the period 2011 to 2016 (using the City of Fort Saskatchewan's 2016 Municipal Census and the Federal Census adjusted by MapInfo for undercounts), the City of Fort Saskatchewan grew from 19,800 to 24,569 residents, an average annual growth rate of 4.4%. Some comparables to this rate of growth include the City of Leduc which grew at an average annual rate of 3.7%, the City of Spruce Grove at 4.3%, the City of Chestermere at 5.0% and the Town of Okotoks with an average annual growth rate of 3.6%.

All of these markets of comparable sizes are experiencing significant population growth along with the requisite demand and pressures for retail opportunities.



Figure 3.3
TRADE AREA POPULATION AGE BREAKDOWN
 (Source: City of Fort Saskatchewan, Pitney Bowes 2016)

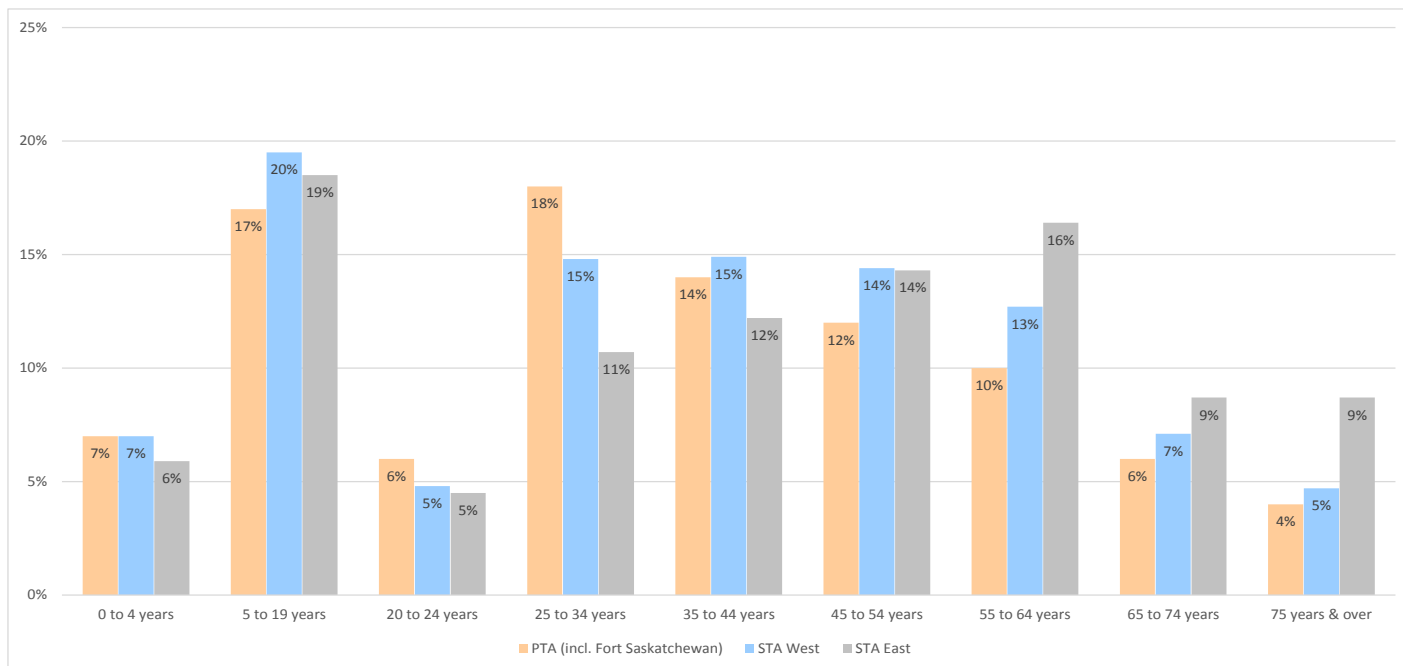


Table 3.2
TRADE AREA POPULATION AGE BREAKDOWN
 (Source: City of Fort Saskatchewan, Pitney Bowes 2016)

2016 Estimates and Projections Population by Age and Sex	PTA (incl. Fort Saskatchewan)		STA West		STA East		Fort Saskatchewan		Edmonton	
		%		%		%		%		%
2016 Estimated Population	25,694	% base	8,409	% base	4,641	% base	24,569	% base	948,112	% base
0 to 4 years	1,664	7%	585	7%	274	6%	1,605	7%	57,219	6%
5 to 9 years	1,521	6%	572	7%	308	7%	1,472	6%	50,698	5%
10 to 14 years	1,345	6%	527	6%	285	6%	1,279	6%	45,028	5%
15 to 19 years	1,411	6%	543	6%	267	6%	1,333	6%	48,451	5%
20 to 24 years	1,646	7%	406	5%	211	5%	1,596	7%	70,648	7%
25 to 29 years	1,980	8%	541	6%	232	5%	1,933	8%	90,828	10%
30 to 34 years	2,211	9%	706	8%	266	6%	2,150	9%	91,429	10%
35 to 39 years	2,054	8%	642	8%	297	6%	1,991	9%	77,216	8%
40 to 44 years	1,683	7%	613	7%	268	6%	1,620	7%	65,113	7%
45 to 49 years	1,580	6%	603	7%	296	6%	1,489	6%	59,647	6%
50 to 54 years	1,594	7%	605	7%	369	8%	1,505	6%	63,404	7%
55 to 59 years	1,550	6%	605	7%	415	9%	1,448	6%	61,544	6%
60 to 64 years	1,354	6%	466	6%	347	7%	1,249	5%	50,118	5%
65 to 69 years	1,001	4%	382	5%	253	5%	918	4%	37,720	4%
70 to 74 years	660	3%	219	3%	151	3%	612	3%	26,526	3%
75 to 79 years	454	2%	174	2%	139	3%	420	2%	20,159	2%
80 to 84 years	287	1%	113	1%	108	2%	272	1%	15,387	2%
85 years and over	379	2%	107	1%	155	3%	360	2%	16,977	2%

3

35.6

MEDIAN AGE IN CITY OF FORT SASKATCHEWAN

(36.7 ALBERTA MEDIAN)

Figure 3.2 illustrates the strong and dominant growth forecasts for the Primary Trade Area, as driven by the City of Fort Saskatchewan compared to the other retail Trade Areas, as well as compared to Edmonton and Provincial forecasts.

Strong growth in the City of Fort Saskatchewan, which represents the nucleus of the PTA, suggests that support for new retail shops and services will continue to grow, although retail development must occur in step with growth to ensure the appropriate balance for the community in terms of provision of services and retention of existing businesses, particularly local businesses.

The Trade Area dynamics for Fort Saskatchewan are expected to continue. More rooftops and more residents will be seeking opportunities closer to their primary residence, which means that retailers could be in a stronger position to tap into more frequent customers, which has the added benefit of providing more stable revenues.



3.3

AGE PROFILE

A summary of the current age profile, as documented in **Table 3.2 & Figure 3.3** reveal a very strong family profile with a significant segment in the 5 - 19 year age cohort and young adults entering their high income earning years, with an average age in the City of Fort Saskatchewan of 35.6 years of age.

Table 3.2 reveals that 32% of the Primary Trade Area's population is currently between the ages of 25 to 44 years. This age cohort represents not only the family building stage, but also the income earning stage. A strong and young family demographic profile is a critical prerequisite for many retailers looking at entering a market or establishing another location in an existing market.

From a retail perspective, spending on discretionary items such as Automobiles and Recreational Vehicles/Motorsports, Fashion, House & Home, Food & Beverage (away from home), Sporting Goods and Entertainment & Leisure is expected to be quite strong, though admittedly not all of this spending can be captured in Fort Saskatchewan given the high level of mobility of this spending age cohort.

While projects such as Cornerstone and Southpointe are looking to position themselves for these markets, these consumer segments are also becoming increasingly savvy and socially aware of the role that supporting local business has in fostering a sense of place and community.

A Citywide retail study of this nature must realize the role that all retail formats play in the establishment and evolution of a complete community.

Table 3.3

TRADE AREA AVERAGE HOUSEHOLD INCOME BREAKDOWN

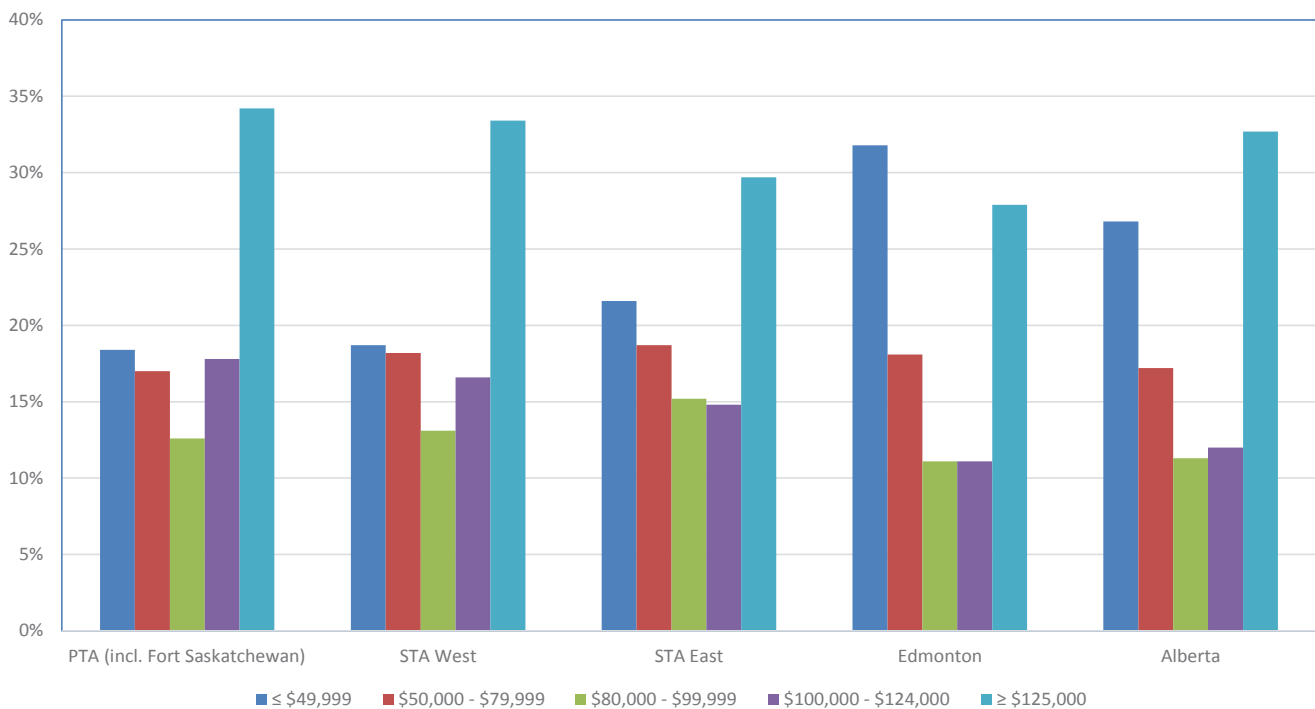
(Source: City of Fort Saskatchewan, Pitney Bowes 2016)

2016 Estimates and Projections Income Trends	PTA (incl. Fort Saskatchewan)	STA West	STA East	Fort Saskatchewan	Edmonton	Alberta
Average household income						
2016 estimated	\$ 120,121	\$ 119,384	\$ 112,692	\$ 119,957	\$ 107,713	\$ 119,320
2019 projected	\$ 130,020	\$ 129,167	\$ 119,901	\$ 129,851	\$ 116,837	\$ 129,425
2021 projected	\$ 136,630	\$ 135,685	\$ 124,727	\$ 136,458	\$ 122,926	\$ 136,256
Aggregate household income (\$000)						
2016 estimated	\$ 1,135,510	\$ 372,642	\$ 202,182	\$ 1,087,169	\$ 41,129,062	\$ 192,272,648
2019 projected	\$ 1,321,433	\$ 415,980	\$ 212,116	\$ 1,265,264	\$ 46,994,623	\$ 217,463,090
2021 projected	\$ 1,460,773	\$ 446,488	\$ 218,481	\$ 1,399,104	\$ 51,324,456	\$ 236,235,927
Change in average household income						
2016 to 2019	\$ 9,899	\$ 9,783	\$ 7,208	\$ 9,894	\$ 9,124	\$ 10,104
2019 to 2021	\$ 6,611	\$ 6,517	\$ 4,826	\$ 6,607	\$ 6,089	\$ 6,831
Change in aggregate household income (\$000)						
2016 to 2019	\$ 185,923	\$ 43,338	\$ 9,934	\$ 178,094	\$ 5,865,561	\$ 25,190,442
2019 to 2021	\$ 139,340	\$ 30,508	\$ 6,364	\$ 133,840	\$ 4,329,833	\$ 18,772,837

Figure 3.4

TRADE AREA AVERAGE HOUSEHOLD INCOME BREAKDOWN

(Source: City of Fort Saskatchewan, Pitney Bowes 2016)



3

34%

PERCENTAGE OF CITY'S HOUSEHOLDS EARNING OVER \$125,000 PER YEAR (2016 ESTIMATES)

(32% ALBERTA AVERAGE)

Consequently, some retail nodes will not compete, nor can they, with the previously noted newer and larger comparison retail nodes, but rather a blend of local and branded shops and services could be very well positioned within closer proximity to peoples' primary residences and areas of employment, such as Downtown (Fort Mall redevelopment) or Westpark.

Restaurants, both family-casual as well as brewpub formats are also well-served in being closer to residential areas.

Fort Saskatchewan however, at its core is a bedroom community and many of the residents will still seek shopping opportunities in areas where there is a critical mass of offering. The relative proximity of new nodes such as Emerald Hills and Manning Town Centre as well as other traditional nodes such as the Sherwood Park Mall will continue to attract the strong demographic segment that resides in Fort Saskatchewan, particularly for Department Store Type Merchandise (DTSM) such as Fashion, Electronics and Home Furnishings.

Therefore, Fort Saskatchewan should look to consolidating and focusing on a provision of shops and services that are most compatible and sought by the target demographic profiles, which would include full-service restaurants, conveniences and personal services.

3.4

INCOME PROFILE

Household and Per Capita Incomes are among the most direct determinants in identifying patterns of spending and potential thereof for Retail, Food & Beverage, Entertainment and Services.

A summary of the current average Household Income in the Retail Trade Area, as documented in **Table 3.3 and Figure 3.4** reveals an average Household Income in 2016 estimated at over \$120,000 in the City of Fort Saskatchewan and its Primary Trade Area, which is higher than both the Provincial average and the City of Edmonton average.

To supplement this Statistics Canada figure, the Consumer Intercept Survey (refer to **Section 6.0**) documented a similar trend whereby over 22.5% of all respondents indicated a household income of higher than \$125,000 per annum.

Table 3.3 also reveals that Household Income in the City of Fort Saskatchewan is forecast to grow at an average annual rate of 2.6% per annum, over the 5-year period 2016 to 2021.

Figure 3.4 shows the former trend whereby 34% of the PTA households earn over \$125,000, which is higher than the rest of the Trade Area, the Province, and the City of Edmonton.

With average household sizes in the Trade Area between 2.6 to 2.7, which is relatively consistent with the provincial average, the income profile illustrates a market that is well positioned to benefit from higher levels of discretionary spending on retail shops and services both in Fort Saskatchewan and outside of the City.

Higher incomes have positive implications for discretionary spending on a variety of goods and services, not the least of which are Fashion, House & Home and Restaurants.

Table 3.4

TRADE AREA RETAIL SPENDING

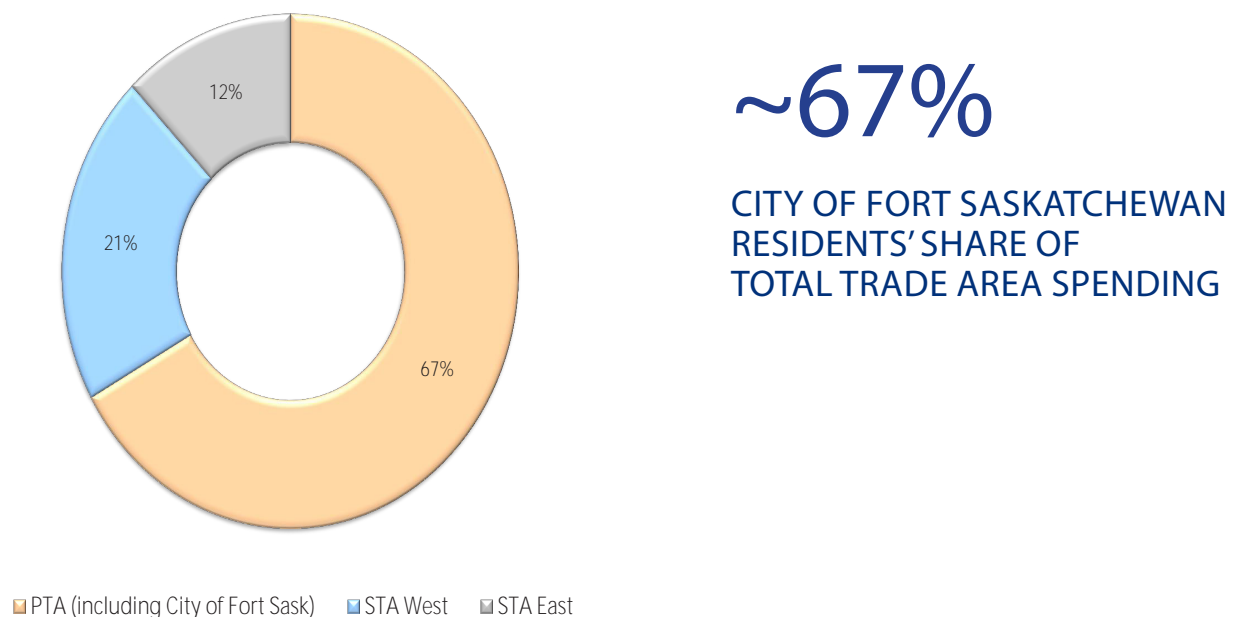
(Source: City of Fort Saskatchewan, Pitney Bowes 2016)

Retail Spending by Merchandise Category	2016 (Year end estimate)					
	City of Fort Sask Aggregate Retail Spending	City of Fort Sask Temp Workforce	PTA Including City of Fort Sask Aggregate Retail Spending	STA West Aggregate Retail Spending	STA East Trade Area Aggregate Retail Spending	TOTAL Trade Area Aggregate Retail Spending
Grocery & Specialty Foods	\$76,714,152	\$3,784,344	\$83,075,400.19	\$26,841,068	\$15,776,562	\$125,693,030
Pharmacy	\$7,846,724	\$387,082	\$8,598,610.50	\$3,470,583	\$2,163,456	\$14,232,650
Alcohol & Tobacco	\$18,234,025	\$899,493	\$19,730,876.78	\$6,506,161	\$4,158,402	\$30,395,441
Personal Services	\$15,871,570	\$782,952	\$17,176,991.82	\$5,100,276	\$2,922,659	\$25,199,927
Clothing & Apparel	\$25,968,251	\$1,281,026	\$28,053,121.71	\$7,990,852	\$4,457,372	\$40,501,346
Footwear	\$7,743,601	\$381,995	\$8,342,051.39	\$2,442,963	\$1,532,901	\$12,317,915
Jewelry & Accessories	\$4,546,788	\$224,295	\$4,886,199.12	\$1,273,493	\$695,785	\$6,855,477
Health & Beauty	\$7,387,358	\$364,422	\$7,956,941.75	\$2,367,310	\$1,458,612	\$11,782,863
Home Furnishings & Accessories	\$20,474,607	\$1,010,022	\$21,911,213.72	\$5,481,693	\$3,196,262	\$30,589,169
Home Electronics & Appliances	\$30,505,664	\$1,504,858	\$32,919,514.36	\$9,727,720	\$5,832,635	\$48,479,869
Home Improvement & Gardening	\$8,165,468	\$402,806	\$8,952,854.28	\$3,451,670	\$2,052,928	\$14,457,452
Books & Multimedia	\$5,371,772	\$264,992	\$5,807,047.96	\$1,746,324	\$1,061,797	\$8,615,169
Sporting Goods & Recreation	\$4,228,044	\$208,571	\$4,560,971.33	\$1,434,256	\$777,322	\$6,772,549
Toys & Hobbies	\$3,628,055	\$178,974	\$3,902,693.63	\$1,175,774	\$795,442	\$5,873,910
Miscellaneous Specialty	\$10,743,544	\$529,984	\$11,565,735.92	\$3,732,217	\$2,435,247	\$17,733,200
Full-Service F&B	\$11,387,781	\$561,764	\$12,295,447.98	\$3,563,510	\$1,999,367	\$17,858,325
Limited Service F&B	\$10,511,798	\$518,552	\$11,349,644.29	\$3,289,394	\$1,845,570	\$16,484,608
Entertainment & Leisure	\$14,268,476	\$703,870	\$15,337,606.44	\$4,652,662	\$2,225,062	\$22,215,331
Auto Parts & Accessories	\$6,074,883	\$299,677	\$6,712,212.77	\$2,959,925	\$1,630,746	\$11,302,884
Auto/RV/Motorsports Dealership	\$54,092,711	\$2,668,418	\$59,423,714.18	\$20,003,925	\$11,235,840	\$90,663,479
TOTAL RETAIL CATEGORIES ONLY	\$343,765,275	\$16,958,098	\$372,558,850	\$117,211,777	\$68,253,968	\$558,024,595

Figure 3.5

TRADE AREA RETAIL SPENDING BY TRADE AREA

(Source: City of Fort Saskatchewan, Pitney Bowes 2016)



3 \$550 Million

TOTAL TRADE AREA RETAIL SPENDING IN 2016 (YEAR END ESTIMATE)

3.5

PART TIME RESIDENT PROFILE

As noted previously, the Oil & Gas industry in and around Fort Saskatchewan has created an additional demographic segment that similarly seeks local shops and services. While the types of shops and services may differ from those of the full-time resident base, this segment of part-time or temporary residents regardless has an impact on retail demand.

The Consumer Intercept Survey of the part-time resident base yielded a profile that is best characterized by a demographic dominated by males in the two age cohorts of 18-24 years and 45-54 years. This is a representation of a demographic who either do not have children yet or have children who have “left the nest”. As such, they will be spending their discretionary income predominantly on themselves. This yearly income of the part-time residents is very high whereby 25% earn between \$100,000 and \$125,000, and a further 30% earn over \$125,000.

Since a large share of these part-time residents stay at hotels in Fort Saskatchewan, estimates suggest that there are approximately somewhere in the range of 1,000 - 1,250 of these part-time residents that are in essence an additional piece to the Trade Area. This figure is down from an estimated 2,500 plus as documented in the original study (2014).

3.6

RETAIL SPENDING PROFILE

Building upon the Trade Area demographic profile analysis, an assessment was made of the Trade Area's retail spending profile. This provides a more refined understanding of the opportunity for retailing within the City of Fort Saskatchewan.

The key questions it seeks to answer are:

- How much do Trade Area residents spend on Convenience retail (such as Grocery and Pharmacy), on Comparison retail¹ (such as Fashion and Home Furnishings), and Leisure (Food & Beverage and Entertainment)?
- What spending patterns or trends does the Trade Area expenditure profile demonstrate? And how is spending forecast to change over the coming years?
- What types of retail goods and services are garnering inflow of sales dollars and which categories are exhibiting outflow of sales (or leakage)?

Detailed information of retail spending within the Trade Area was collected from the Conference Board of Canada and Pitney Bowes, a leading supplier of demographic and consumer expenditure information. Data was collected at a detailed micro-geographic scale for individual street blocks. This data was then aggregated to each respective Trade Area in order to build a spending profile, that is specific to each respective Trade Area.

Each of the major three categories of spending (Convenience, Comparison and Leisure) was assessed at a detailed category-by-category level, then aggregated into major categories.

The initial task involved developing an understanding of how each of the delineated Trade Area residents spend their shopping and leisure dollars on a per capita basis for each of 20 merchandise categories.

¹ Comparison Retail comprises retail categories that one would usually compare prices or shop around. Examples include Automobiles, Fashion, Footwear, House & Home, Books, Specialty Retail. The term Comparison Retail is synonymous with the Industry Term DSTM, which refers to Department Store Type Merchandise or GAFO, which refers to General Merchandise, Apparel Accessories, Furniture and Other Stores.

Figure 3.6
TRADE AREA RETAIL SPENDING SUMMARY 2016
 (Source: City of Fort Saskatchewan, Pitney Bowes 2016)

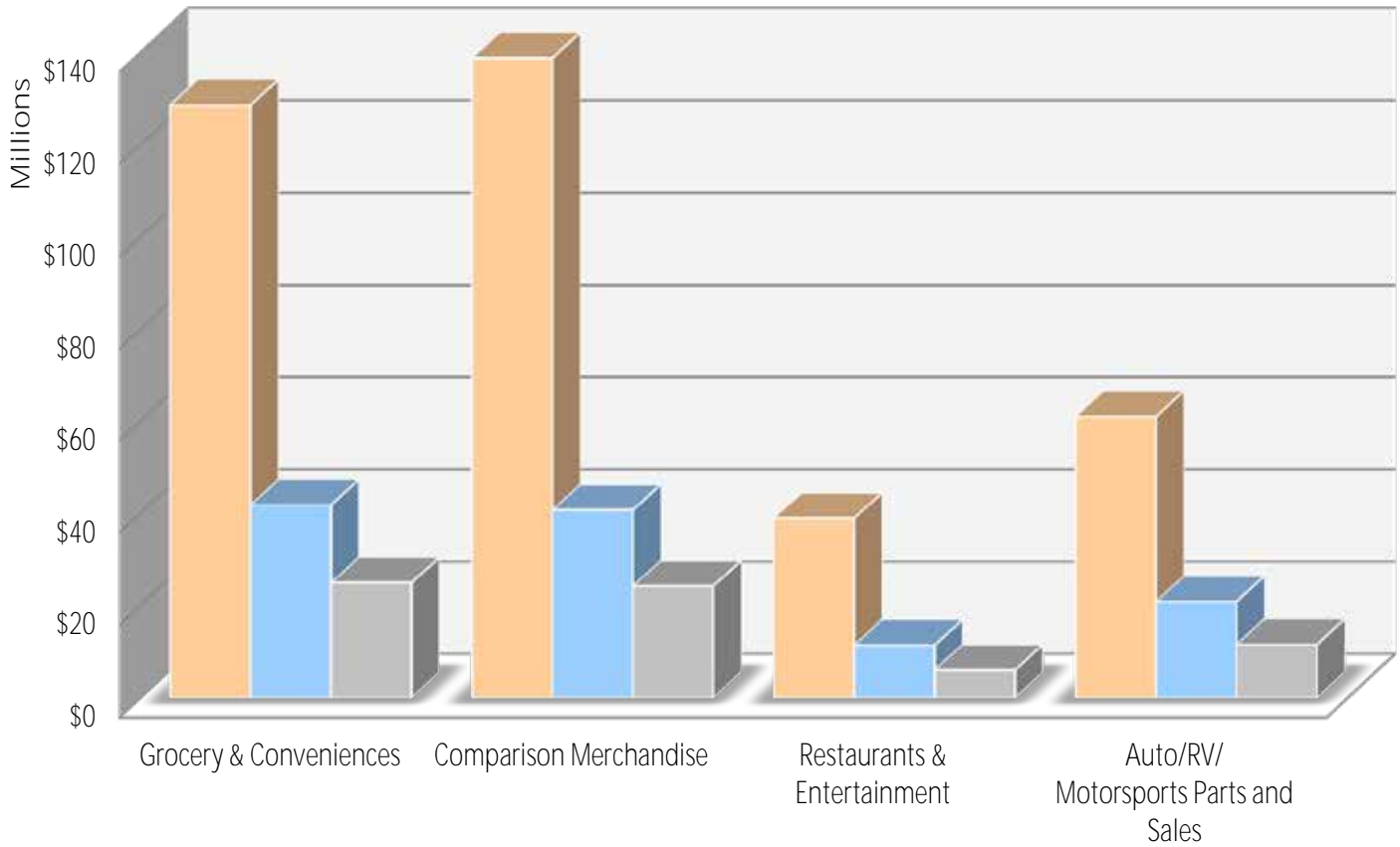
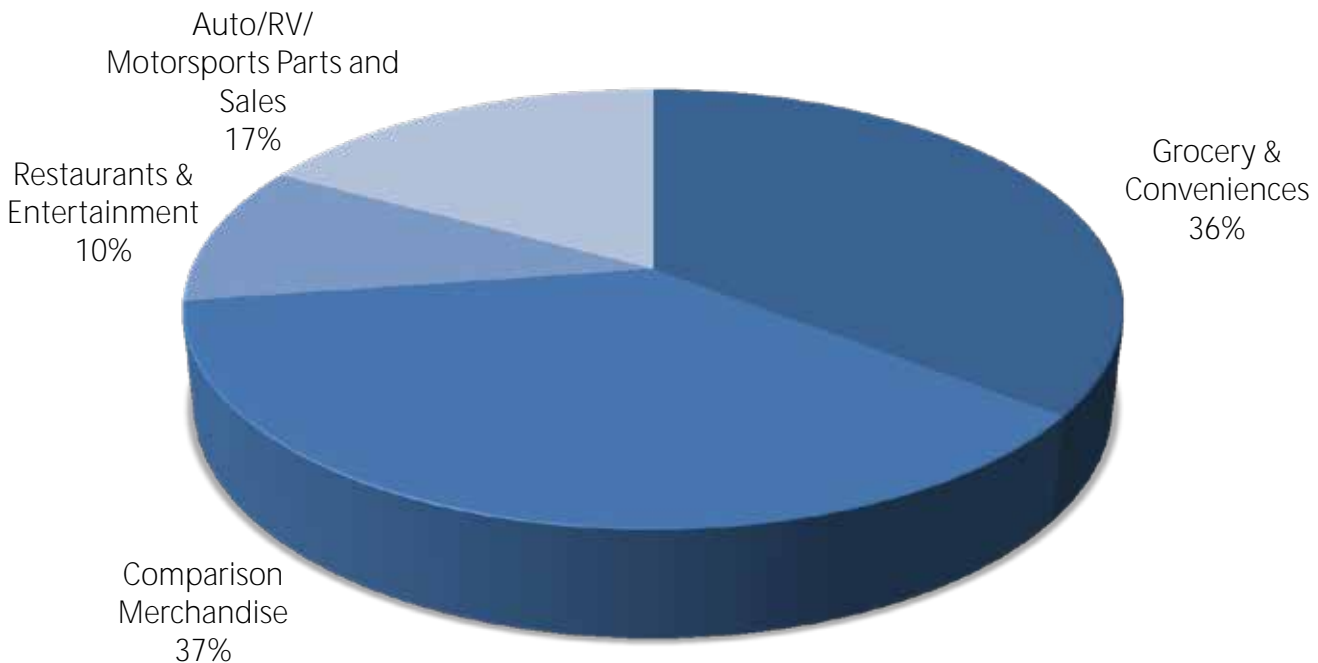


Figure 3.7
TRADE AREA RETAIL SPENDING BY GENERAL CATEGORY
 (Source: City of Fort Saskatchewan, Pitney Bowes 2016)



3

Once this Trade Area spending profile was established, the data was aggregated by population to quantify the total size of the Trade Area's retail market.

Having established the Trade Area boundaries, population and demographic profile, the size of the retail market and its anticipated growth was projected using retail spending data from Pitney Bowes.

As illustrated in **Table 3.4**, the Total Trade Area for the City of Fort Saskatchewan is estimated at \$550 Million (2016 year end estimate).

The fact that Fort Saskatchewan is a more locally-driven retail node, as opposed to regional, is evidenced in the fact that over 67% of the Trade Area retail spending originates from the Primary Trade Area, of which 62% comes from City of Fort Saskatchewan residents alone.

Additionally, given the proximity of Strathcona County and its new large-scale retail developments on the north side of the County combined with new developments in Northeast Edmonton, the ability of Fort Saskatchewan to tap into spending further south is limited.

Part-time residents represent an approximate \$40 Million market. During their residency in Fort Saskatchewan they have a propensity to spend the majority of their income on Grocery, Personal Services and Food & Beverage. It is these critical segments that the City of Fort Saskatchewan should ensure it has the proper provisions.

Retail spending on Comparison Merchandise by Trade Area residents is very strong and when combined with the Auto/RV/Motorsports categories, reinforces the strength of the market's disposable and discretionary income.

Moreover, healthy patterns of spending on categories such as Clothing, Footwear, Jewelry, House & Home, Computers & Electronics, etc. provide a benchmark against which prospective tenant, developer or investor interests could gauge the opportunity, though as mentioned most of the larger retailers are likely to look at Emerald Hills and Manning Town Centre before Fort Saskatchewan.

Regardless of where residents spend their money, The Top 5 retail spending categories for the Total Trade Area are:

1. *Grocery & Specialty Foods - \$125.7 Million*
2. *Auto/RV/Motorsport - \$90.7 Million*
3. *Home Electronics & Appliances - \$48.5 Million*
4. *Clothing & Apparel - \$40.5 Million*
5. *Full & Quick Service Restaurants - \$34.3 Million*

Another noteworthy category of spending, which ranks only marginally behind Full & Quick Service Restaurants is Home Furnishings (\$30.6 Million).

3.7

SUMMARY & IMPLICATIONS

Fort Saskatchewan's Retail Trade Area reflects a realistic look at where the majority of customers are likely to come from and on what shops and services they are most likely to spend their money.

Both Emerald Hills and Manning Town Centre are in the midst of developing significantly sized retail developments with strong clusters of destination and Department Store Type Merchandise. Each of these projects has Fort Saskatchewan as part of their Primary Trade Area and thus it would be difficult for the City of Fort Saskatchewan to compete directly against these emerging strong retail nodes.



Tamarack Brewery, Montana | designed by Cushing Terrell Architecture Inc.

3

Therefore, the Retail Trade Area for Fort Saskatchewan must be realistic and not overstate the area against which it will compete.

Accordingly, the Retail Trade Area for the City of Fort Saskatchewan is a reflection of the competitive influences as well as a realization that residents of Fort Saskatchewan and the communities north, west and east will still like the convenience and accessibility that Fort Saskatchewan provides for a critical mass of more necessity-based merchandise, while not discounting the need for more essential comparison items.

The Trade Area Demographic Profile illustrates a very strong local trade area that will grow from over 38,000 in 2016 to approximately 46,000 over the next decade.

Fort Saskatchewan's strengths lie in its demographics, which are substantiated by a significant household income well above the regional and provincial averages.

Secondly, the Trade Area has a strong and dynamic young family profile who are both mobile in their shopping patterns, yet are increasingly seeking opportunities to spend their money closer to home for more frequent purchases.

Overall, Fort Saskatchewan represents a \$550 Million retail market (2016 year estimates) in which categories such as Grocery, Automotive/RV, Home Electronics & Appliances, Clothing & Apparel, and Restaurants represent significant spending segments.

As will be seen in forthcoming sections, Fort Saskatchewan's retail demand and prospects for retail growth will mirror the propensity of residents to spend their dollars in their own community versus outside (i.e. retained spending versus outflow).

For Fort Saskatchewan to be a successful retail market it will require the right mix of shops and services and right-sizing to accommodate realistic demand expectations.





Photo credit: Cushing Terrell Architecture Inc. 2014

4 RETAIL MARKET SUPPLY

4.1 INTRODUCTION

The dynamics of the overall retail market provide critical indicators as to the performance of the retail and moreover the magnitude of demand and resulting opportunity for which niches could be filled.

This section will provide a detailed picture of the overall Citywide retail mix comprising a detailed inventory of the retail centres/nodes and tenants therein that make up the City of Fort Saskatchewan's retail market.

To further assess the level of retail supply, a comprehensive inventory and evaluation was conducted with respect to locations, format and amount of space (refer to **Appendix A** for detailed inventory listing). This evaluation creates a foundation upon which retail "gaps" could be quantified and determined.

The inventory will reflect current as well as proposed or future retail centres/nodes, such that the City can be understood relative to competitive influences and potential tenant opportunities today and into the near future.

The purpose of the competitive evaluation is to firstly identify a foundation for demand and current retail performance (also known as retail sales productivity) followed by identifying the potential types of tenants and/or merchandise categories for whom Fort Saskatchewan could represent a compatible fit.

4.2 REGIONAL RETAIL MARKET CONTEXT

The northeast Edmonton region has three major retail nodes that create competitive alternatives for shopping outflow within Fort Saskatchewan's Retail Trade Area. In total, these three nodes currently represent about 1.67 million sq. ft. of retail space, though at buildout this figure will increase to over 2.0 million sq. ft. These include the following:

1. Manning Town Centre/Clareview Centre

Manning Town Centre is a new regional retail node located approximately 20 kilometers (about 15 minute drive) southwest of Fort Saskatchewan and at buildout will have over 800,000 sq. ft. of retail. Major retailers in this node include Cabela's, Cineplex, and SportChek.

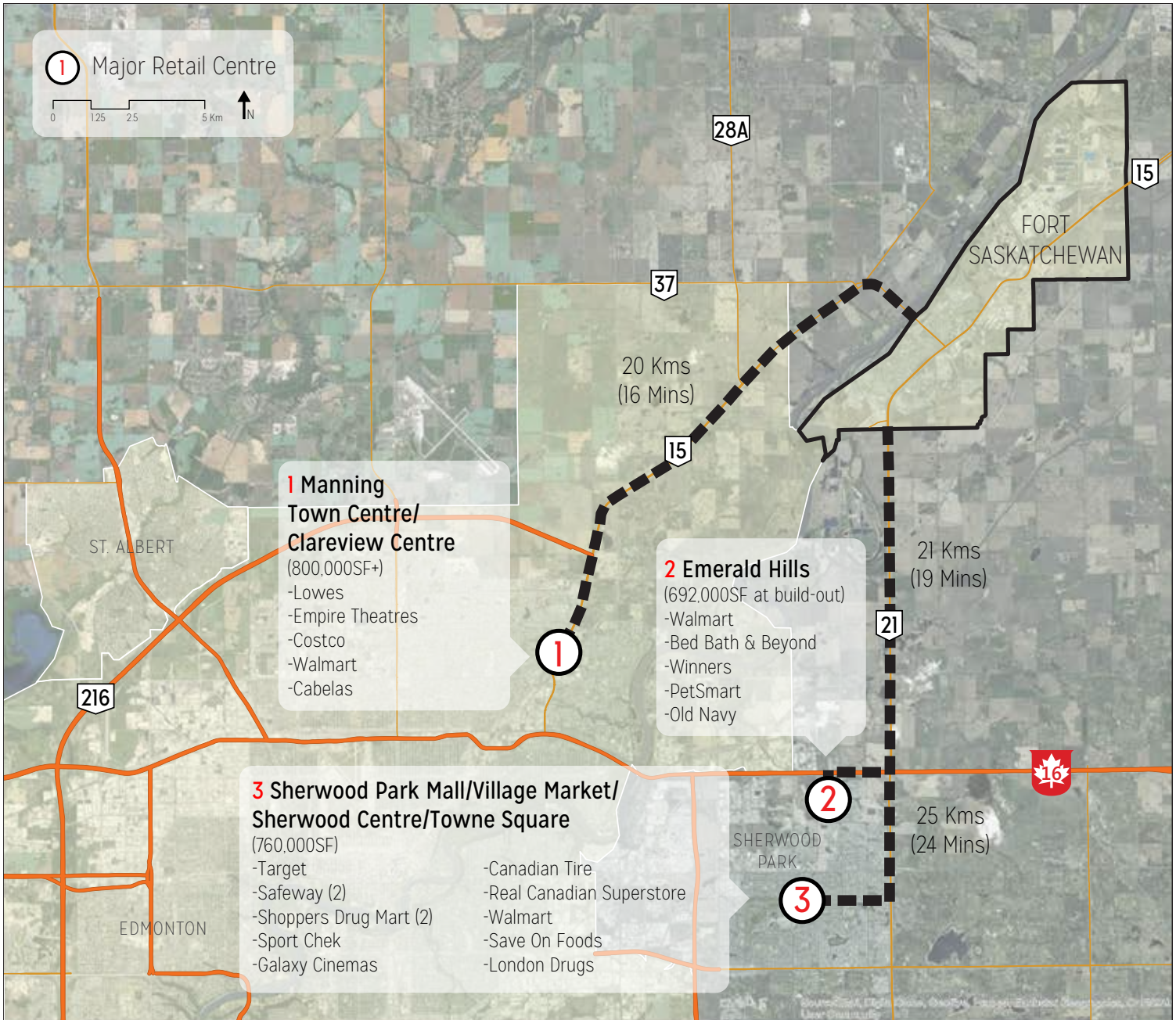
2. Emerald Hills Centre

At 21 kilometers away, Emerald Hills Centre is another new major regional retail node and about 15 minute drive time from the City of Fort Saskatchewan. Walmart, Bed Bath & Beyond, Winners, PetSmart, Wine & Beyond and Old Navy are major tenants, though many more are planned. Emerald Hills is estimated to be approximately 840,000 sq. ft. at buildout.

3. Sherwood Park Mall/Village Market/ Sherwood Centre/Towne Square

These four clusters combine to offer about 760,000 sq. ft. of retail space, and are spread out along the major corridors of Sherwood Drive, Wye Road and Baseline Road in Sherwood Park.

Figure 4.1
FORT SASKATCHEWAN REGIONAL RETAIL MARKET CONTEXT



4

Sherwood Park Mall is a regional enclosed centre located approximately 25 kilometers, or about 25 minutes drive from Fort Saskatchewan. According to the Consumer Intercept Survey, Sherwood Park Mall continues to be a major comparison shopping destination for residents of Fort Saskatchewan. Over twenty percent (21.5%) of Survey Respondents indicated that Sherwood Park Mall was their Primary Comparison (or DSTM) shopping destination. Anchoring the 430,000 sq. ft. mall include Safeway, Shoppers Drug Mart, Chapters, and Cineplex, among others.

Sherwood Towne Square, also approximately 25 minutes away is the location of the nearest Real Canadian Superstore to Fort Saskatchewan. This location suggest that perhaps Real Canadian Superstore may be considered as a potential target tenant for Fort Saskatchewan, given its current store network strategy. Village Market and Sherwood Centre front either side of the east-west Wye Road corridor and are home to Canadian Tire and a Walmart Supercentre, as well as several medium-format retailers that are also located in Fort Saskatchewan.

4.3 RETAIL PROJECTS

Figure 4.2 documents and highlights the major retail nodes and projects in the City of Fort Saskatchewan. This diagram also includes areas of future development.

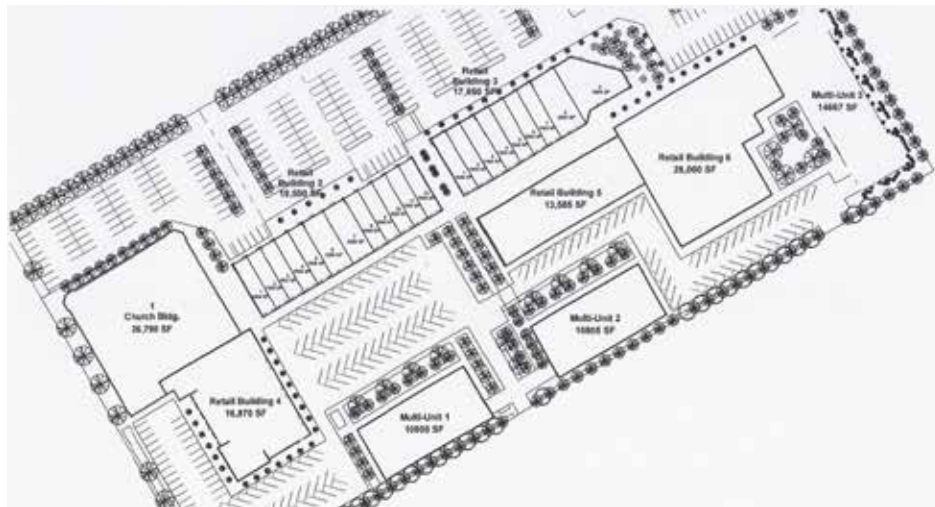


Figure 4.2 clearly illustrates the concentrations of retail activity along Highways 15 and 21, which are highlighted by Power Centres such as Cornerstone and Southpointe, freestanding retailers such as Walmart, Home Depot and Canadian Tire as well as Shoppers Drug Mart, Safeway and Staples.

The following provides brief narratives on the major projects planned or currently under development in the City of Fort Saskatchewan that are ready to accommodate potential retailers.

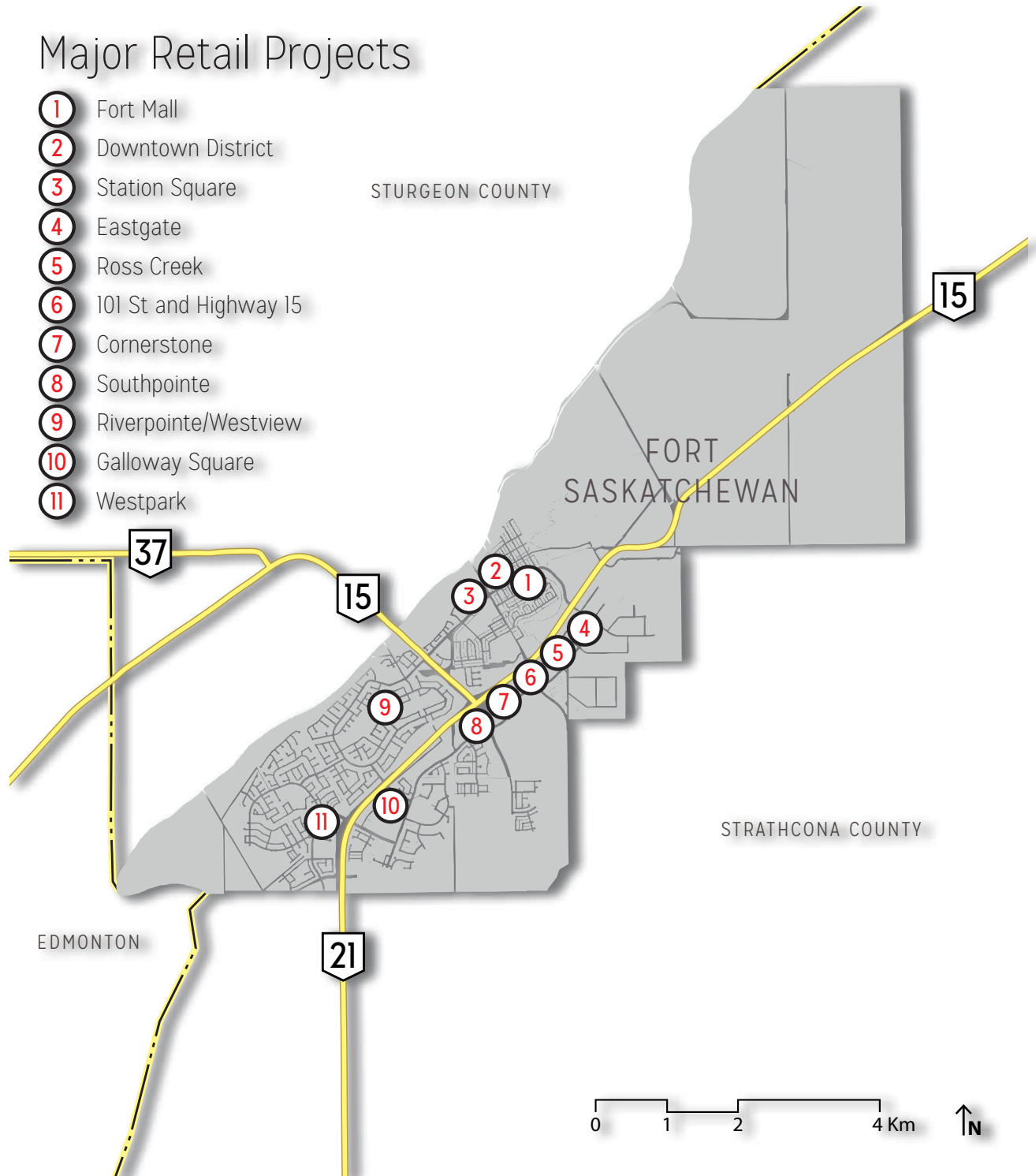
Fort Station

On the site of the former Fort Mall, Fort Station is a newly re-developed/re-positioned retail node featuring a variety of tenants, including a clothing company, a liquor store, a brew house, and a recreational trampoline facility, among others. Currently open businesses comprise a total of over 30,000 sq. ft.

Figure 4.2

CITY OF FORT SASKATCHEWAN RETAIL INVENTORY & PROJECTS

(Source: City of Fort Saskatchewan, Cushing Terrell Architecture Inc)



4

The Fort Mall was a vehicle-oriented suburban retail environment surrounded by lower density residential uses. As of December 2014, the site is under construction with redevelopment plans calling for a horizontally mixed-use retail commercial and multi-family residential development. The plan calls for conversion of the formerly enclosed centre to an outward-facing externalized retail environment, which will provide higher quality retail units with much improved visibility to Downtown vehicular and pedestrian traffic.

The City's Land Use Bylaw was amended to accommodate for standalone residential uses on the roughly twelve (12) acre site. The new "C5 - Fort Mall Redevelopment District" was specifically requested and prepared to accommodate the project. The site was subsequently subdivided to accommodate the mix of uses.

Downtown District

Vibrant and progressively evolving, Fort Saskatchewan's downtown is an approximate 20 hectare (50 acre) commercial district comprised of smaller-format retail, office and residential uses set in an urban core. One- and two-storey street fronted buildings contribute to a traditional retail environment conducive to window shopping and pedestrian activity. General policy direction for the downtown is to promote local neighbourhood servicing retail and office commercial uses.

An ongoing revitalization effort began in 2008 with City Council's direction to complete a Downtown Area Revitalization Plan (DARP). Projects are championed by the Downtown Redevelopment Advisory Committee (DRAC) and the Downtown Business Council, who both guide business improvement efforts in the Downtown Redevelopment Area.

One example is the Downtown Storefront Program that incentivizes businesses to improve their street-facing facades. A \$10 million streetscaping and infrastructure improvement project was also completed in 2010.

The Downtown, as with many others across the region, province, and country are susceptible to external competitive pressures for retail growth. Therefore, it will be important as the city grows to ensure the Downtown vibrancy and vitality that the City and its businesses have worked so diligently to maintain is not adversely impacted by unnecessary retail developments on the periphery of the City, except where clearly not compatible with the Downtown.

Station Square

Station Square is an approximately 3.5 hectare (9 acre) retail cluster adjacent to downtown. Major tenants include a CO-OP grocery, TD Canada Trust, ATB Financial, and Snap Fitness.

A largely vehicle-oriented, neighbourhood-serving strip centre, Station Square benefits from adjacency to downtown and the City's residential neighbourhoods. A recently built three-storey structure provides additional service-oriented retail and office space.

Eastgate Plaza

Eastgate Plaza is an older, smaller 1.2 hectare (3 acre) retail node fronting Highway 15 in the northern part of the City. This older development comprises approximately 35,000 sq. ft. of vehicle-oriented commercial space, a roughly 20,000 sq. ft. home improvement store and a 15,000 sq. ft. auto dealership. Eastgate Plaza itself is a small piece of the much larger Eastgate Business Park, an older, established light industrial district.

Ross Creek Crossing

Ross Creek Crossing is a retail development of about 8 hectares (20 acres) with roughly 45,000 sq. ft. of vehicle-oriented retail. Ross Creek has available vacant land between two commercial strip centres with good visibility and accessibility from Highway 15, creating potential for future retail development. A new medical office building offers a small pharmacy to serve the neighbourhood.

101 Street and Highway 15

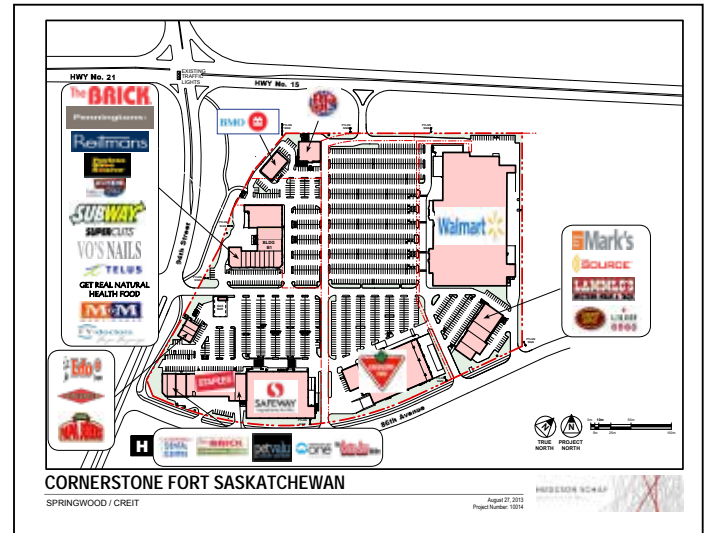
This 10 hectare (26 acre) development is sandwiched between the Cornerstone Power Centre and Ross Creek. Various commercial uses such as hotels, self-storage, a No Frills grocery and Winners Way Source For Sports currently occupy space in this development, which also benefits from excellent highway visibility and access. There is currently some infill land available.

Cornerstone

Cornerstone is a large retail power centre with the most square footage of national and branded tenants in Fort Saskatchewan. At 13 hectares (32 acres) and with over 385,000 sq. ft. of retail space, and approximately 30 tenants, Cornerstone offers a multi-destination retail option for consumers in the Trade Area. Walmart, Canadian Tire, Staples and Safeway are the centre's anchor tenants. For residents of Fort Saskatchewan, Cornerstone which includes a Safeway, is the most preferred convenience retail node as indicated by 63% of Consumer Survey respondents' responses.

SouthPointe

This 13.5 hectare (34 acre) development consists of about 140,000 sq. ft. of retail space with 17 national and branded tenants, including Home Depot, Shoppers Drug Mart, Starbucks, Domino's Pizza, and Original Joe's.



SouthPointe currently has 6 parcels totalling 6 hectares (15 acres) of vacant commercially-zoned land, suggesting SouthPointe is one of the most prominent locations for future vehicle-oriented commercial shopping centre growth.

Recent retail additions to the SouthPointe shopping area include a Co-op Gas & Convenience Store, and a Kal Tire vehicle shop; a 24,000 sq. ft. Goodlife Fitness is anticipated to open in 2017.

Riverpointe/Westview

Located in isolation from the other major retail clusters in Fort Saskatchewan, Riverpointe/Westview is a small neighbourhood-serving strip centre. With about 13,000 sq. ft. of retail space in Riverpointe and another 28,000 sq. ft. in Westview, retailers in this collective node average about 1,900 sq. ft. Currently there is vacant space available for lease at Riverpointe.

4

1.19 million sf

CITY OF FORT SASKATCHEWAN'S RETAIL INVENTORY

Galloway Square

Galloway Square is a new retail development of around 15,000 sq. ft. on about one hectare (2.4 acres) of land. Included in this development are two full-service restaurants associated with hotels (Ricky's Grill and Montana's).

Westpark

Westpark is a new, developing retail node near the south entrance to the City that includes three commercial corners at a major intersection of Highway 21. The Westpark node, being developed by Qualico, currently has approximately 19 retailers with a further 70,000 + sq. ft. of retail proposed. At build-out Westpark will be a mixture of neighbourhood-serving and community-scale retail tenants.

The retail component of Westpark is being developed to coincide with the development of an adjacent large residential neighbourhood.

As is common in a market the size of Fort Saskatchewan, retail developments in the City represent a wide range of formats with new developments being provided at the community and neighbourhood scale such as Cornerstone/ Southpointe, Westpark and Station Square respectively.

As the Fort Saskatchewan market continues to grow and evolve and new developments become more appropriate for tenants, the Downtown area and Fort Station (previously Fort Mall) have become revitalized and rebuilt in an attractive manner.

Table 4.1

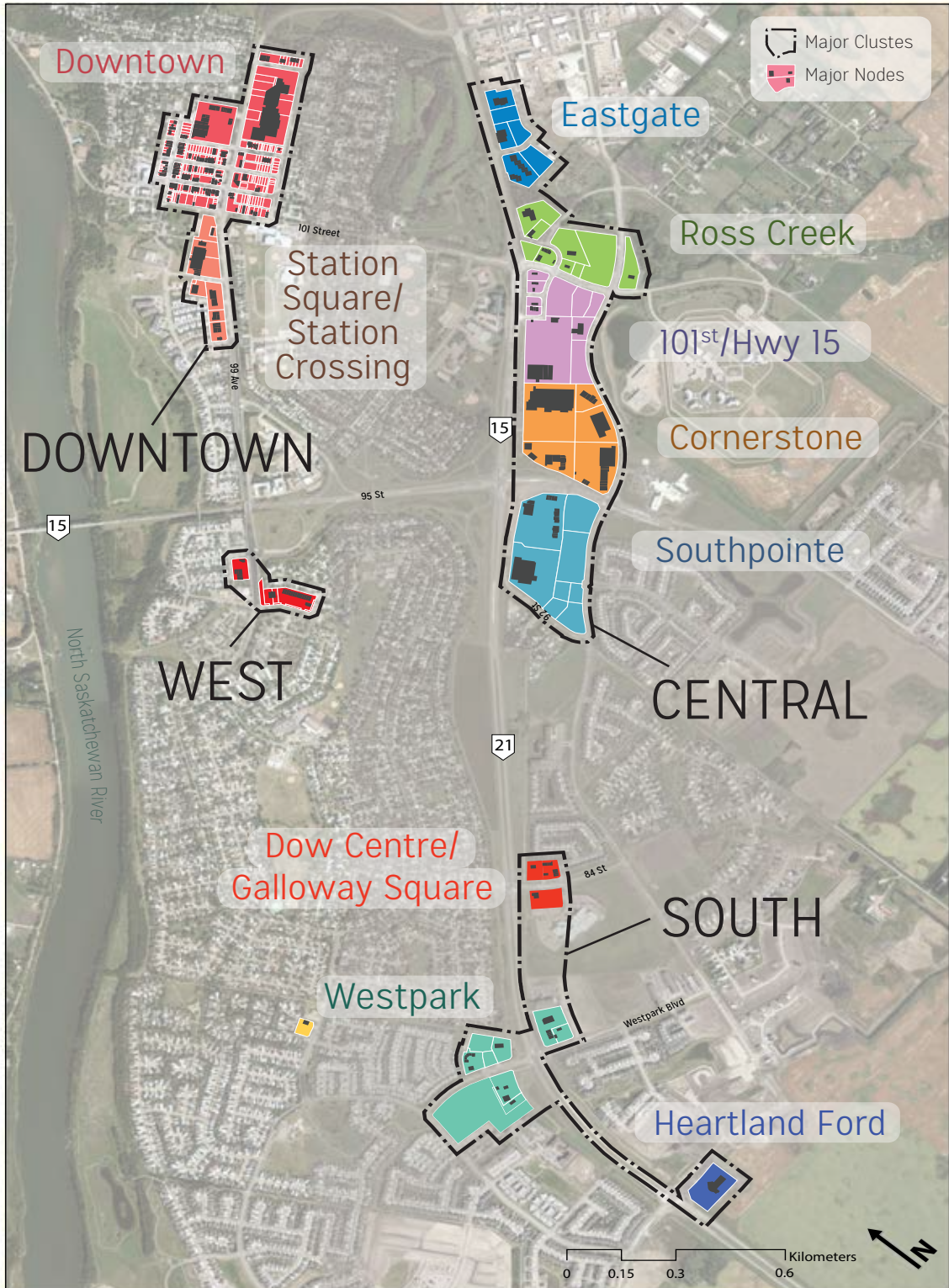
CITY OF FORT SASKATCHEWAN RETAIL INVENTORY

(Source: City of Fort Saskatchewan & Cushing Terrell Architecture Inc.)

Merchandise Category	Existing Inventory (SF)	Existing Inventory (%)	Number of Stores	% of Number of Stores	Average Store Size
Grocery & Specialty Foods	181,075	15.16%	16	5.6%	11,317
Alcohol & Tobacco	28,529	2.39%	14	4.9%	2,038
Pharmacy	50,426	4.22%	5	1.7%	10,085
Personal Services	138,712	11.62%	64	22.3%	2,167
Clothing & Apparel	84,211	7.05%	9	3.1%	9,357
Footwear	4,741	0.40%	2	0.7%	2,370
Jewelry & Accessories	6,019	0.50%	2	0.7%	3,009
Health & Beauty	34,961	2.93%	24	8.4%	1,457
Home Electronics & Appliances	19,744	1.65%	3	1.0%	6,581
Home Furnishings & Accessories	38,301	3.21%	5	1.7%	7,660
Home Improvement & Gardening	120,919	10.13%	4	1.4%	30,230
Books & Multi-Media	2,403	0.20%	1	0.3%	2,403
Sporting Goods & Outdoor Recreation	22,781	1.91%	2	0.7%	11,390
Toys & Hobbies	13,936	1.17%	2	0.7%	6,968
Specialty Retail	83,700	7.01%	33	11.5%	2,536
Full Service F&B	76,645	6.42%	23	8.0%	3,332
Limited Service F&B	59,768	5.01%	36	12.5%	1,660
Entertainment & Leisure	63,119	5.29%	9	3.1%	7,013
Auto Parts & Accessories	65,798	5.51%	10	3.5%	6,580
Auto/RV/Motorsports Dealership	57,400	4.81%	5	1.7%	11,480
VACANT	40,861	3.42%	18	6.3%	2,270
TOTAL	1,194,049	100.00%	287	100%	4,160

Figure 4.3
RETAIL NODES
 (Source: Cushing Terrell
 Architecture Inc.)

Identified Retail Node (Includes vacant retail spaces)	Total Inventory (sf)
CENTRAL	654,329
SOUTH	110,763
DOWNTOWN	378,402
WEST	50,555
TOTAL	1,194,049



4 3.4%

CITY OF FORT SASKATCHEWAN'S RETAIL VACANCY

These are extremely beneficial steps in terms of creating a resilient and attractive retail market, for both residents and visitors. Retail developments that focus on the local culture and history help to form an identity of a place, which can make shopping a more memorable experience will need to find ways to enhance or redefine their spaces and positioning, realizing that certain tenants, particularly those with an established brand will likely target the newer developments in close proximity to new emerging residential hot spots, such as in the south/southeast areas of the City.

For the 2016 update, new retailers within the community were included with floor space estimates, and any businesses closed were also factored in to the updated 2016 inventory count.

The inventory was categorized into the same merchandise categories that were profiled in the retail spending so that a direct comparison could be taken. In some cases where retail data was not available, store sizes were estimated using leasing plans, developer websites, GIS and satellite mapping measurements.

4.4

CITYWIDE RETAIL INVENTORY

To document the retail inventory for the City of Fort Saskatchewan, Cushing Terrell conducted on-the-ground fieldwork in which every retail project and retail node was documented in terms of the retail store brand, merchandise category and estimated unit size.

As documented in **Tables 4.1 and 4.2**, the City of Fort Saskatchewan has an estimated retail floorspace of approximately 1.19 million sq. ft. This retail floorspace is comprised of approximately 287 retail premises that range from Auto Dealerships to Restaurants and Personal Services such as Florists or Salons.

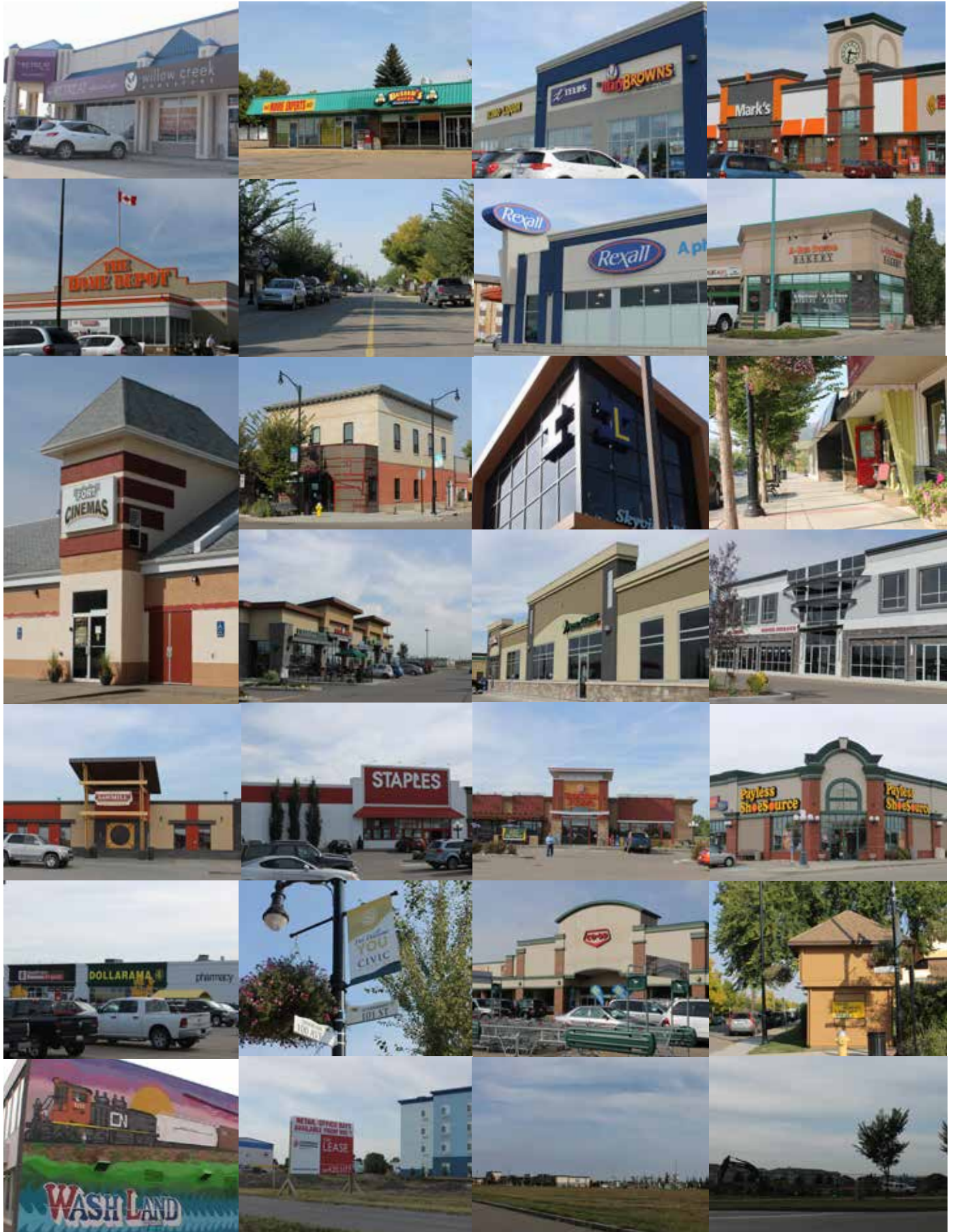
Table 4.2

RETAIL INVENTORY BY CATEGORY & NODE

(Source: City of Fort Saskatchewan, Cushing Terrell Architecture Inc.)

Merchandise Category	IDENTIFIED RETAIL NODE				TOTAL (sf)
	CENTRAL	SOUTH	DOWNTOWN	WEST	
Grocery & Specialty Foods	123,073	6,734	47,127	4,142	181,075
Alcohol & Tobacco	11,130	4,071	9,426	3,903	28,529
Pharmacy	23,495	25,732	0	1,200	50,426
Personal Services	32,406	7,961	91,052	7,293	138,712
Clothing & Apparel	61,552	0	22,659	0	84,211
Footwear	4,129	0	611	0	4,741
Jewelry & Accessories	2,000	0	4,019	0	6,019
Health & Beauty	7,168	3,376	20,365	4,051	34,961
Home Electronics & Appliances	15,455	0	4,289	0	19,744
Home Furnishings & Accessories	37,075	0	0	1,226	38,301
Home Improvement & Gardening	115,679	0	5,240	0	120,919
Books & Multi-Media	1,000	0	1,403	0	2,403
Sporting Goods & Outdoor Recreation	21,976	0	805	0	22,781
Toys & Hobbies	12,000	0	1,936	0	13,936
Specialty Retail	45,306	1,930	33,982	2,482	83,700
Full Service F&B	22,190	22,568	28,069	3,818	76,645
Limited Service F&B	31,944	12,753	10,642	4,429	59,768
Entertainment & Leisure	4,618	0	48,501	10,000	63,119
Auto Parts & Accessories	49,022	1,510	15,266	0	65,798
Auto/RV/Motorsports Dealership	31,243	24,129	2,028	0	57,400
VACANT	1,867	0	30,984	8,010	40,861
TOTAL	654,329	110,763	378,402	50,555	1,194,049

Figure 4.4
REPRESENTATIVE CITY RETAIL IMAGERY
Source: Photos by Cushing Terrell Architecture Inc.)



4

232,000 sf

AMOUNT OF GROCERY/PHARMACY FLOORSPACE IN CITY

In this store count, those businesses that may be more office related (e.g. Professional Services such as lawyers, medical clinics, chiropractors, dentists etc), but nonetheless occupy ground level traditional retail frontage are noted, however the retail inventory does not account for these Professional Services, since they do not have typical “retail sales productivity” applicable to their business.

The inventory does however distinguish and therefore take into account Personal Services (e.g. Financial, Salons etc.) that do occupy traditional streetfront retail spaces.

A review of the Fort Saskatchewan’s competitive retail environment provides a number of indicators as to potential merchandise and tenant opportunities.

The local market has reached a threshold whereby a number of other branded chains could have sufficient market support to warrant a location and in some cases second or multiple locations depending on the type of retailer, however there is currently a deficiency in the quality of retail space and configurations suitable for new market entries. One such example would be Shoppers Drug Mart whose typical model would require a population of approximately 10,000 to justify a store of 15,000 sq. ft. -18,000 sq. ft.

4.5

RETAIL INVENTORY BY NODE

Based on fieldwork and inventory, Fort Saskatchewan’s Retail environment was allocated into four nodes. Each node was determined based on geographic and spatial factors such as road networks, patterns of residential development or types of inventory.

The result were the following nodes totaling 1.19 million sq. ft:

• CENTRAL	654,300 sf
• DOWNTOWN	378,402 sf
• SOUTH	110,763 sf
• WEST	50,555 sf

The Central and South nodes comprise the majority of the comparison or destination types of shops and services, while the Downtown node has a large number of local and independent Specialty Retail and Limited Service Food & Beverage (F&B) businesses. The West node is comprised of Neighbourhood-serving shops and services.

Table 4.2 provides a breakdown of the City’s retail inventory by category and by node and reveals the strengths and weaknesses of each. It is worth noting however, that because a specific node may not have any retail space, this does not suggest that there is a void, but rather could be simply a reflection of the area being more local in its trade area. This is particularly the case for the West node, which provides the basic day-to-day needs for its local trade area residents.

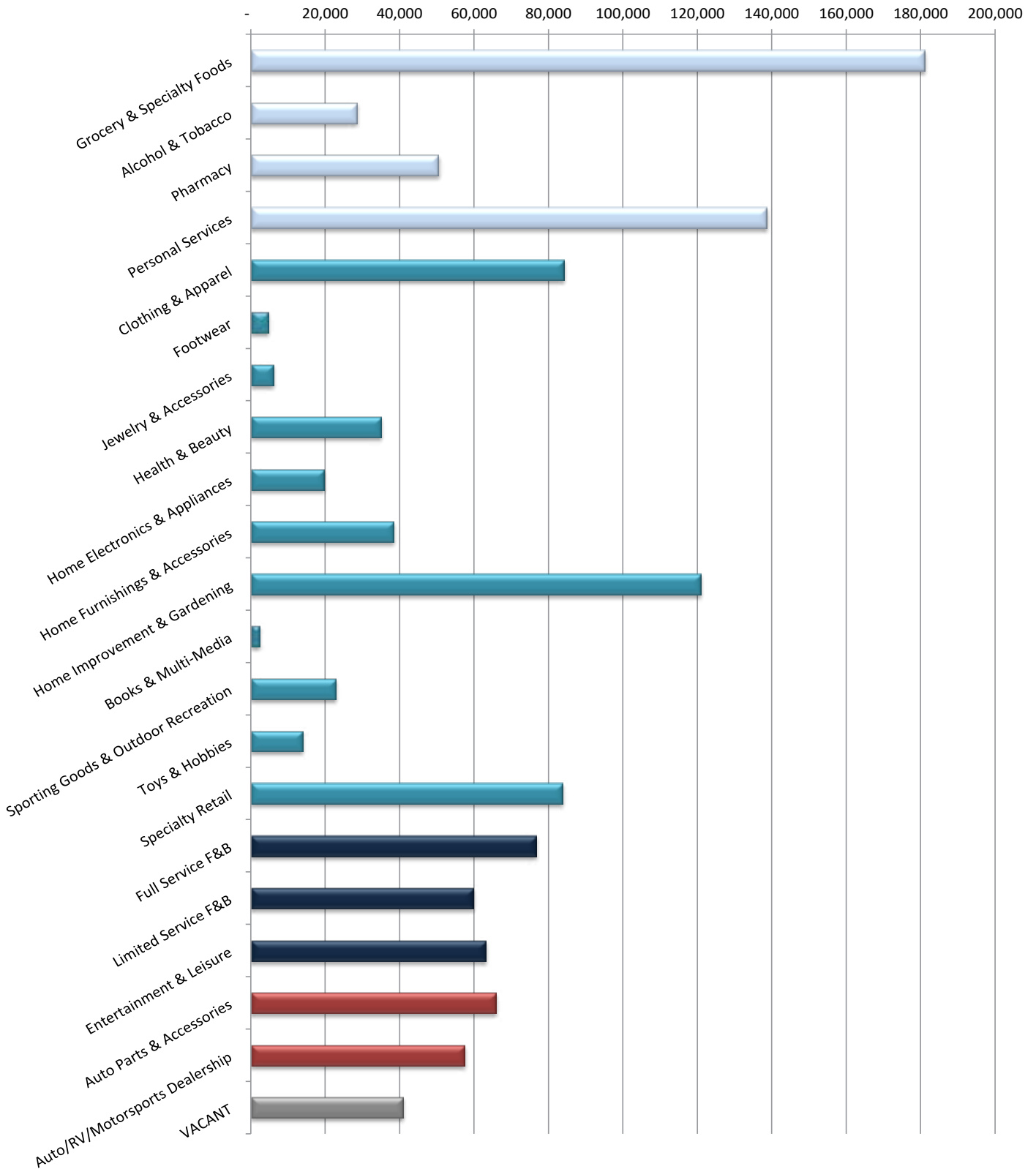
Conversely, the Central node has a wide array of all types of shops and services, though its largest share of retail category is Grocery & Specialty Foods with over 123,000 sq. ft. or 19% of the total Central node floorspace. This is further validation as to why Consumer Survey respondents see this area as their Primary Convenience node.

The Downtown node’s largest retail category is Personal Services which currently accounts for 24% of the total Downtown floorspace. This high ratio is driven by the fact that the Downtown features smaller format, neighbourhood-serving retail with nearby residential.

Figure 4.5

CITY OF FORT SASKATCHEWAN RETAIL INVENTORY FLOORSPACE BY CATEGORY

(Source: Cushing Terrell Architecture Inc.)



4

378,400

AMOUNT OF SQUARE FOOTAGE IN DOWNTOWN

The South retail node has seen notable growth since the publishing of the original report in 2014. New developments include Shoppers Drug Mart, The Great Canadian Brewhouse and Wendy’s in the WestPark Centre, which is continuing to grow. The progression of this development is consistent with the notion that retail tends to follow rooftops, meaning as more residential dwellings are constructed (the south is a core area of residential growth in the City), retail in the area will naturally become more established.

Relative to the amount of space in the South node, Auto/RV/Motorsports Dealerships represent approximately 22% of the South node floorspace, as a result of the Heartland Ford relocation. Being located on the heavily-trafficked southern entrance to the City creates a highly desirable location for these uses.

4.6 RETAIL INVENTORY BY CATEGORY

Categories of retail were also incorporated into the overall inventory list as shown in **Figures 4.5 & 4.6**.

Table 4.3
RETAIL INVENTORY SUMMARY BY NODE & CLASS
(Source: City of Fort Saskatchewan, Cushing Terrell Architecture Inc)

Identified Retail Node (Includes vacant retail spaces)	Total Inventory (sf)	Inventory Class A (sf)	Inventory Class B (sf)	Inventory Class C (sf)
CENTRAL	654,329	191,378	415,186	47,765
SOUTH	110,763	54,124	23,693	32,947
DOWNTOWN	378,402	18,269	102,114	258,019
WEST	50,555	955	15,957	33,643
TOTAL	1,194,049	264,725	556,949	372,374

The current vacancy in the Downtown node accurately gauges the ongoing revitalization, as most of this vacant space (30,984 sq. ft.) is located in the Market Square or Fort Mall centres which are currently being redeveloped. Other than these projects, the Downtown has a relatively strong rate of occupancy.

Designating retail categories to the overall inventory makes it possible to conduct a category void analysis for Fort Saskatchewan.

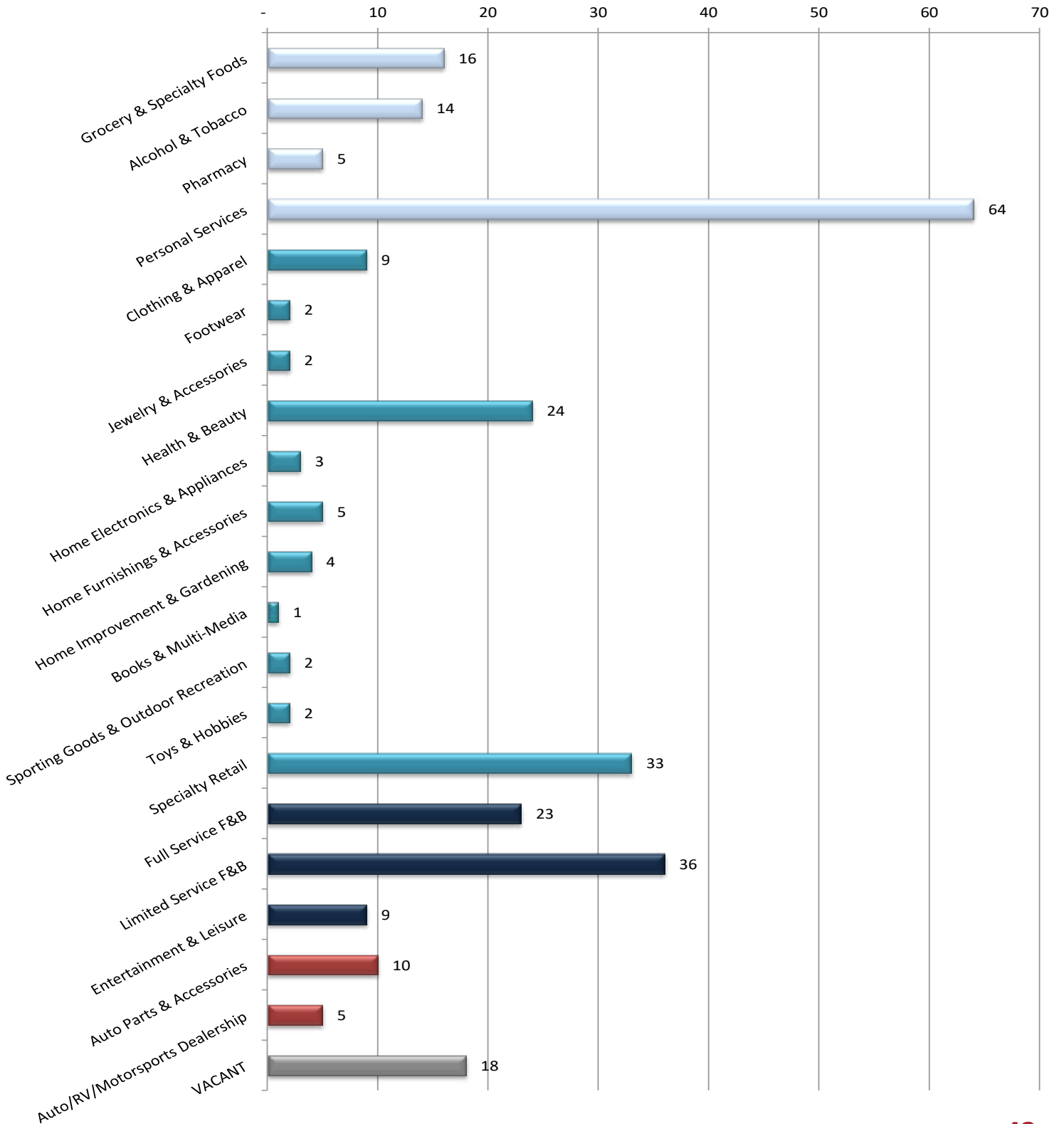
This is important to note since future growth in the City will continue to put pressure on the Downtown over time. But if the Downtown continues to ensure its positioning and vibrancy, it too can maintain a viable alternative to the more expensive, higher rent locations in the City.

Categories were designated to correspond directly with the categories of retail utilized in the household expenditure data, thereby allowing for retail inflow and outflow calculations to correlate.

Figure 4.6

CITY OF FORT SASKATCHEWAN RETAIL INVENTORY BY CATEGORY & NUMBER OF STORES

(Source: Cushing Terrell Architecture Inc. 2014)



4

On a citywide basis, the Top 5 retail categories in terms of overall retail floorspace include:

1. *Grocery & Specialty Foods* 181,100 sf
2. *Personal Services* 138,700 sf
3. *Home Improvement* 121,000 sf
4. *Specialty Retail* 83,700 sf
5. *Clothing and Apparel* 84,200 sf

Newer developments/redevelopments such as those identified in **Figure 4.2** (e.g. Cornerstone/Southpointe, Westpark) have the potential to create a better foundation for success for both local and branded tenants. Location will always be one of the most critical determinants, particularly for a comparison retailer for whom patronage is required from beyond a localized trade area. It will be challenging for Fort Saskatchewan to compete for Comparison retailers, given the development of both Emerald Hills and Manning Town Centre, which have the locational benefit of being able to intercept consumer traffic.

The majority of categories which show a low level of inventory include Jewelry & Accessories (6,000 sq. ft. in 4 stores), Footwear (4,740 sq. ft. in 2 stores) and Books & Media (2,400 sq. ft. in 1 store). Together these three categories make up only 1.1% of Fort Saskatchewan's total retail inventory. Each of these categories may be considered under-served, however they are more conducive to Fort Saskatchewan's market profile, when considering the demographics and typical store size formats.

However, industry-wide the Book industry continues to struggle in the face of on-line competition by vendors such as Amazon. Nonetheless, a store such as Indigo/Chapters, which is undergoing a transformational shift to become a "cultural department store" could represent a potential addition to the City's retail inventory, though again it would likely be challenging when considering Fort Saskatchewan's external competitive forces.

4.7

RETAIL INVENTORY BY CLASS

As previously shown through a retail inventory category analysis and location analysis, the Fort Saskatchewan retail market would seem to be largely in balance.

Although Fort Saskatchewan's retail landscape and inventory is dominated by the Central and Downtown nodes, the South node is increasingly becoming a strong node, partly due to the location which places this node in the strongest location to tap into new residential development in the city. This will have implications on other nodes as the City grows. In particular, the Downtown will face pressures for tenant attraction and retention.

The analysis shown in **Table 4.3** is a valuable tool to shed light on opportunities associated with categories of retail which either may be relying on Fort Saskatchewan's older infrastructure or may be looking to relocate to more modern spaces in the coming years.

The categorization of class is based on a subjective evaluation criteria such as the age of the building (e.g. older than 5 yrs), locational attributes (e.g. parking, access, visibility) and whether the tenant is a chain store or local (refer to notation beside **Figure 4.7**).



Beartooth Harley Davidson, Montana | designed by Cushing Terrell

4

48.6 sf

RATIO OF TOTAL RETAIL FLOORSPACE PER CAPITA IN CITY

Figure 4.7

CITY OF FORT SASKATCHEWAN RETAIL INVENTORY BY CLASS OF RETAIL SPACE

(Source: Cushing Terrell Architecture Inc. 2014)

Note: The allocations as Class A, B or C is a subjective assessment based on the following attributes:

Class A is considered to be a newer retail space occupying a high profile location with strong traffic counts, access and egress.

Class B is considered to be older retail space that may have been recently renovated, but still benefits from adequate visibility, traffic counts as well as access and egress.

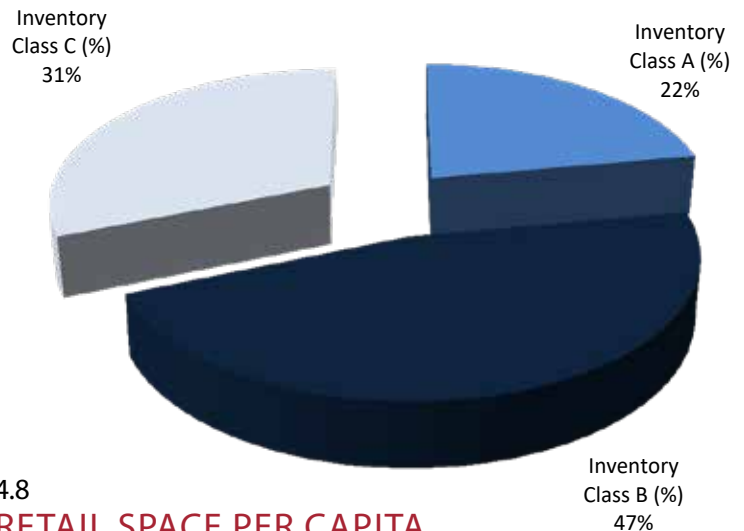
Class C is considered to be outdated or obsolete retail space located in low traffic areas, with resulting lower customer patronage rates.

The role of the classification is to provide a sensitized figure against which sales productivities could be forecast. For example, a clothing store in Downtown Fort Saskatchewan is likely to have a lower sales productivity than a clothing store in the Cornerstone Centre. Such differences need to be taken into account when estimating retail sales and resulting demand.

As displayed in **Figure 4.7**, the caliber of retail in Fort Saskatchewan can best be classified as average in that the majority of retail spaces fall within the B Class quality (47%).

A Class accounts for 22%, but is expected to increase while C Class comprises 31% of the total retail space.

With the number of new developments either under construction or proposed in the City, the amount of A Class space is expected to increase. An increase in higher quality retail spaces will create notable opportunities for exposing the Fort Saskatchewan brand and opportunity to new-to-market retailers as well as those tenants wishing to relocate or add additional locations.



4.8

RETAIL SPACE PER CAPITA

Retail space per capita is an industry measure of the ratio of retail space against a city's population. An examination of retail space per capita provides a general indication as to whether a market is under-retailed or over-retailed.

In most urban markets in Canada and the United States, a typical benchmark for ALL retail space per capita (meaning not just organized shopping centres, but streetfront and small scale freestanding or neighbourhood retail) is in the range of 30 sq. ft. to 40 sq. ft. (Source: International Council of Shopping Centers).

For most markets that fall within the 30 to 40 sq. ft. per capita range, they are typically self-serving markets, meaning they do not have a significant regional trade area, but rather fulfill the demand and needs of its own City's population base.

When applying the retail inventory for the City of Fort Saskatchewan against the City's population, the resulting per capita ratio is 48.6, which suggests the City could be slightly over-retailed.



4

This figure does not though take into account the quality of the retail space and thus it should be acknowledged that older obsolete space can sometimes skew this figure. Regardless, it does provide a general indication.

Per capita space ratio can be further used as a guide when forecasting future demand for the City.

4.9

SUMMARY & IMPLICATIONS

The resulting inventory for the City of Fort Saskatchewan illustrates a community oriented retail offering that provides essential shops and services for residents of Fort Saskatchewan as well as populations within an approximate 15 - 20 minute drive, primarily north, northwest and east of the City.

Overall, the City's inventory has grown substantially over the past few years to a point now whereby the city should exercise caution so as to not be over-retailed in categories that could negatively impact areas such as Downtown.

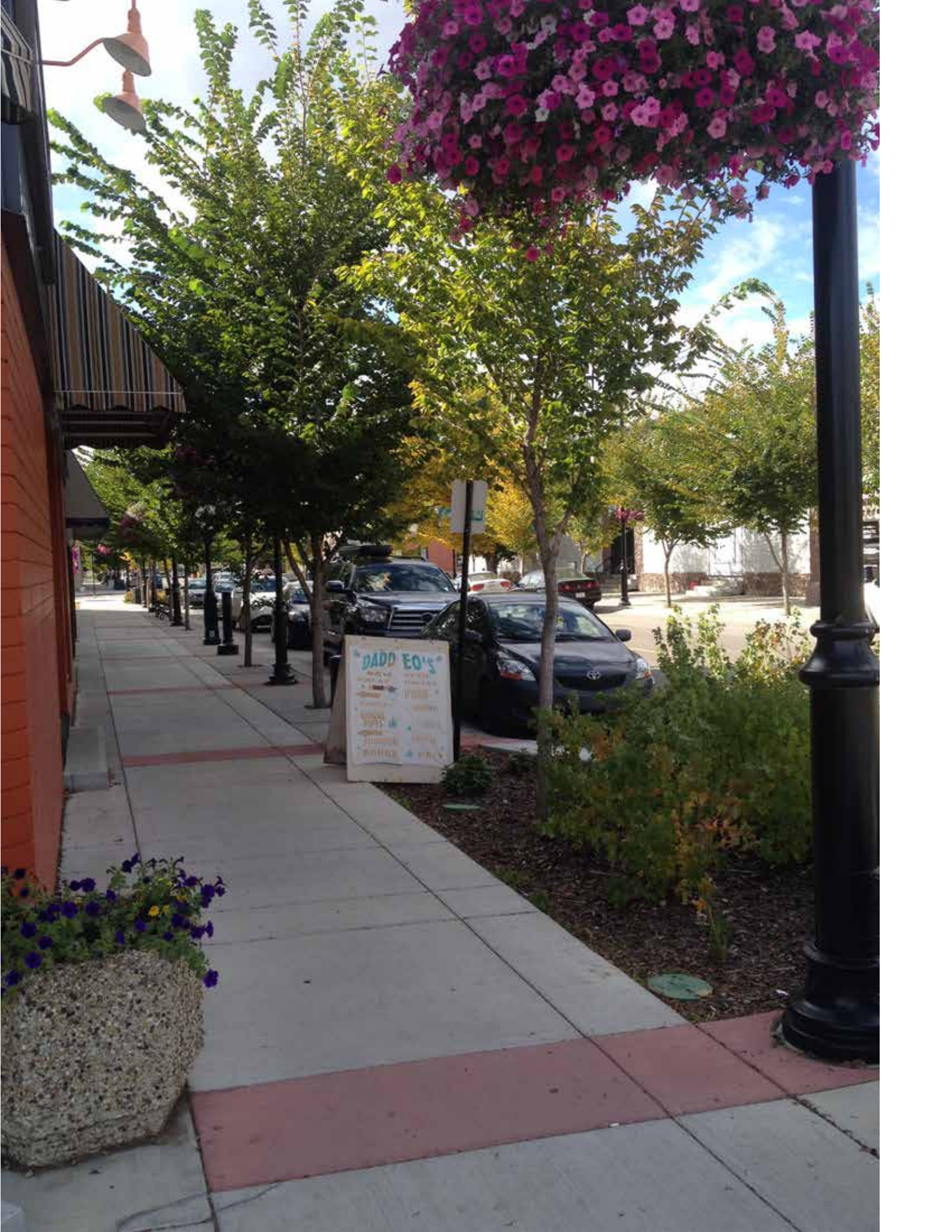
The City has an estimated retail inventory of almost 1.19 million sq. ft. and a vacancy of less than 4% which suggests a healthy retail environment.

The city sits at a point where the retail market in terms of inventory and vacancies as well as downtown viability are relatively balanced and in good stead.

The analysis of the city's retail inventory reveals strength in convenience retail categories.

The biggest threat to Fort Saskatchewan's retail outlook will come from the newer developing projects at Emerald Hills and Manning Town Centre.

Rather than trying to compete with those larger projects, the City of Fort Saskatchewan has the opportunity to target specific categories and tenants that can maintain the city's balance while at the same time capitalizing on voids in the market.



5 RETAIL DEMAND & GAP ANALYSIS

5.1 INTRODUCTION

The following section will quantify the amount of supportable floorspace in the City of Fort Saskatchewan as justified by the Trade Area it serves. After determining the supportable and residual floorspace (if and as determined), the retail gap analysis will measure the difference between the supply and demand as presented in terms of inflow or outflow of retail sales.

5.2 RETAIL FLOORSPACE DEMAND BY TRADE AREA SEGMENT

Tables 5.1 through 5.8 depict the Retail Floorspace demand estimates that are estimated to come from Fort Saskatchewan's respective Retail Trade Area's. This measure of retail demand is used to further rationalize the current amount of inventory in the City and further highlight where particular areas of deficiency or opportunity may lie as it relates to the overall retail offering in the City.

By dividing the aggregate Trade Area retail spending potential by category-specific retail sales productivity estimates (measured in \$ per sq. ft.), a metric commonly used by the retail industry to quantify sales performance, the estimated warranted floorspace can be calculated.

Once the estimated expenditure for each Trade Area is calculated, an estimated market share is applied to each category. This reflects an estimate on how much retail sales the City of Fort Saskatchewan could reasonably be expected to garner from each respective Trade Area.

Market Share estimates are derived in part from the results of the Consumer Intercept Survey which asked respondents what percentage of their retail spending on a specific category was "inside Fort Saskatchewan" or "outside Fort Saskatchewan.

This resulting new expenditure then has a category-specific sales productivity applied which results in an estimated floorspace demand figure attributable to each Trade Area segment.

City of Fort Saskatchewan Supply - Demand

Starting with **Table 5.1**, the City of Fort Saskatchewan as a stand-alone market is quantified to determine, based on expenditure and market shares, just how much retail space the City's 24,500 residents could reasonably justify, not taking into account inflow of any kind.

Accordingly, **Table 5.1** reveals that the City's residents could justify approximately just over 556,000 sq. ft. of retail space, at an overall retained market share of 60%.

Since this study is examining the City of Fort Saskatchewan's retail market, the resulting market shares and demand are viewed as "retained" in that 60% of total City of Fort Saskatchewan resident spending is retained in the City of Fort Saskatchewan. The remaining 40% is considered outflow and spent elsewhere in Sherwood Park, Strathcona County, or the City of Edmonton.

The resulting figures in **Table 5.1** depict a market that retains strong market share for conveniences and necessity goods, but much of the DSTM or Comparison Goods purchases are made outside of Fort Saskatchewan.

TABLE 5.1
CITY OF FORT SASKATCHEWAN RETAIL FLOORSPACE DEMAND

Retail Spending by Merchandise Category	2016 (Year End Est.)			
	City of Fort Saskatchewan Retail Sales Productivity (\$psf)	Fort Saskatchewan Retained Market Share	Retained Sales \$	Floorspace Demand (sf)
Grocery & Specialty Foods	\$510	85%	\$65,207,029	127,857
Pharmacy	\$540	85%	\$6,669,716	12,351
Alcohol & Tobacco	\$450	85%	\$15,498,921	34,442
Personal Services	\$280	85%	\$13,490,835	48,182
Clothing & Apparel	\$235	40%	\$10,387,301	44,201
Footwear	\$245	40%	\$3,097,441	12,643
Jewelry & Accessories	\$570	40%	\$1,818,715	3,191
Health & Beauty	\$400	65%	\$4,801,783	12,004
Home Furnishings & Accessories	\$215	30%	\$6,142,382	28,569
Home Electronics & Appliances	\$575	35%	\$10,676,982	18,569
Home Improvement & Gardening	\$270	65%	\$5,307,554	19,658
Books & Multimedia	\$315	30%	\$1,611,532	5,116
Sporting Goods & Recreation	\$205	35%	\$1,479,815	7,219
Toys & Hobbies	\$205	35%	\$1,269,819	6,194
Miscellaneous Specialty	\$195	45%	\$4,834,595	24,793
Full-Service F&B	\$325	65%	\$7,402,058	22,776
Limited Service F&B	\$580	75%	\$7,883,849	13,593
Entertainment & Leisure	\$180	40%	\$5,707,390	31,708
Auto Parts & Accessories	\$335	65%	\$3,948,674	11,787
Auto/RV/Motorsports Dealership	\$405	55%	\$29,750,991	73,459
TOTAL RETAIL CATEGORIES ONLY	\$371	60%	\$206,987,382	558,310

TABLE 5.2
PART-TIME FORT SASKATCHEWAN RESIDENT RETAIL FLOORSPACE DEMAND

Retail Spending by Merchandise Category	2016 (Year End Est.)			
	Temp Residents Retail Sales Productivity (\$psf)	Temp Residents Inflow Market Share	Inflow Sales \$	Floorspace Demand (sf)
Grocery & Specialty Foods	\$510	36.5%	\$1,367,610	2,682
Pharmacy	\$540	36.5%	\$139,886	259
Alcohol & Tobacco	\$450	45.0%	\$400,764	891
Personal Services	\$280	75.5%	\$585,276	2,090
Clothing & Apparel	\$235	18.0%	\$228,302	971
Footwear	\$245	6.0%	\$22,693	93
Jewelry & Accessories	\$570	6.0%	\$13,324	23
Health & Beauty	\$400	6.0%	\$21,649	54
Home Furnishings & Accessories	\$215	1.5%	\$15,000	70
Home Electronics & Appliances	\$575	9.5%	\$141,546	246
Home Improvement & Gardening	\$270	7.5%	\$29,911	111
Books & Multimedia	\$315	6.0%	\$15,742	50
Sporting Goods & Recreation	\$205	6.0%	\$12,390	60
Toys & Hobbies	\$205	6.0%	\$10,632	52
Miscellaneous Specialty	\$195	8.5%	\$44,603	229
Full-Service F&B	\$325	45.0%	\$250,291	770
Limited Service F&B	\$580	43.0%	\$220,770	381
Entertainment & Leisure	\$180	11.5%	\$80,144	445
Auto Parts & Accessories	\$335	28.5%	\$84,562	252
Auto/RV/Motorsports Dealership	\$450	0.0%	\$0	0
TOTAL RETAIL CATEGORIES ONLY	\$379	22%	\$3,685,095	9,729

TABLE 5.3
PTA (INCLUDING CITY) RETAIL FLOORSPACE DEMAND

Retail Spending by Merchandise Category	2016 (Year End Est.)			
	PTA Incl Fort Sask Retail Sales Productivity (\$psf)	PTA Inflow & Retained Market Share	Inflow & Retained Sales \$	Floorspace Demand (sf)
Grocery & Specialty Foods	\$510	85%	\$70,614,090	138,459
Pharmacy	\$540	85%	\$7,308,819	13,535
Alcohol & Tobacco	\$450	85%	\$16,771,245	37,269
Personal Services	\$280	85%	\$14,600,443	52,144
Clothing & Apparel	\$235	40%	\$11,221,249	47,750
Footwear	\$245	40%	\$3,336,821	13,620
Jewelry & Accessories	\$570	40%	\$1,954,480	3,429
Health & Beauty	\$400	65%	\$5,172,012	12,930
Home Furnishings & Accessories	\$215	30%	\$6,573,364	30,574
Home Electronics & Appliances	\$575	35%	\$11,521,830	20,038
Home Improvement & Gardening	\$270	65%	\$5,819,355	21,553
Books & Multimedia	\$315	30%	\$1,742,114	5,531
Sporting Goods & Recreation	\$205	35%	\$1,596,340	7,787
Toys & Hobbies	\$205	35%	\$1,365,943	6,663
Miscellaneous Specialty	\$195	45%	\$5,204,581	26,690
Full-Service F&B	\$325	65%	\$7,992,041	24,591
Limited Service F&B	\$580	75%	\$8,512,233	14,676
Entertainment & Leisure	\$180	40%	\$6,135,043	34,084
Auto Parts & Accessories	\$335	65%	\$4,362,938	13,024
Auto/RV/Motorsports Dealership	\$450	55%	\$32,683,043	72,629
TOTAL RETAIL CATEGORIES ONLY	\$376	60%	\$224,487,984	596,976

TABLE 5.4
STA WEST RETAIL FLOORSPACE DEMAND

Retail Spending by Merchandise Category	2016 (Year End Est.)			
	STA West Retail Sales Productivity (\$psf)	STA West Inflow Market Share	Inflow Sales \$	Floorspace Demand (sf)
Grocery & Specialty Foods	\$510	25%	\$6,710,267	13,157
Pharmacy	\$540	25%	\$867,646	1,607
Alcohol & Tobacco	\$450	25%	\$1,626,540	3,615
Personal Services	\$280	25%	\$1,275,069	4,554
Clothing & Apparel	\$235	10%	\$799,085	3,400
Footwear	\$245	10%	\$244,296	997
Jewelry & Accessories	\$570	10%	\$127,349	223
Health & Beauty	\$400	20%	\$473,462	1,184
Home Furnishings & Accessories	\$215	5%	\$274,085	1,275
Home Electronics & Appliances	\$575	10%	\$972,772	1,692
Home Improvement & Gardening	\$270	50%	\$1,725,835	6,392
Books & Multimedia	\$315	5%	\$87,316	277
Sporting Goods & Recreation	\$205	10%	\$143,426	700
Toys & Hobbies	\$205	25%	\$293,944	1,434
Miscellaneous Specialty	\$195	10%	\$373,222	1,914
Full-Service F&B	\$325	20%	\$712,702	2,193
Limited Service F&B	\$580	10%	\$328,939	567
Entertainment & Leisure	\$180	10%	\$465,266	2,585
Auto Parts & Accessories	\$335	20%	\$591,985	1,767
Auto/RV/Motorsports Dealership	\$450	15%	\$3,000,589	6,668
TOTAL RETAIL CATEGORIES ONLY	\$375	18%	\$21,093,795	56,200

TABLE 5.5
STA EAST RETAIL FLOORSPACE DEMAND

Retail Spending by Merchandise Category	2016 (Year End Est.)			
	STA East Retail Sales Productivity (\$psf)	STA East Inflow Market Share	Inflow Sales \$	Floorspace Demand (sf)
Grocery & Specialty Foods	\$510	80%	\$12,621,249	24,748
Pharmacy	\$540	80%	\$1,730,765	3,205
Alcohol & Tobacco	\$450	80%	\$3,326,722	7,393
Personal Services	\$280	80%	\$2,338,127	8,350
Clothing & Apparel	\$235	20%	\$891,474	3,794
Footwear	\$245	20%	\$306,580	1,251
Jewelry & Accessories	\$570	20%	\$139,157	244
Health & Beauty	\$400	50%	\$729,306	1,823
Home Furnishings & Accessories	\$215	10%	\$319,626	1,487
Home Electronics & Appliances	\$575	20%	\$1,166,527	2,029
Home Improvement & Gardening	\$270	75%	\$1,539,696	5,703
Books & Multimedia	\$315	5%	\$53,090	169
Sporting Goods & Recreation	\$205	25%	\$194,331	948
Toys & Hobbies	\$205	50%	\$397,721	1,940
Miscellaneous Specialty	\$195	25%	\$608,812	3,122
Full-Service F&B	\$325	30%	\$599,810	1,846
Limited Service F&B	\$580	25%	\$461,392	796
Entertainment & Leisure	\$180	20%	\$445,012	2,472
Auto Parts & Accessories	\$335	45%	\$733,836	2,191
Auto/RV/Motorsports Dealership	\$450	30%	\$3,370,752	7,491
TOTAL RETAIL CATEGORIES ONLY	\$395	47%	\$31,973,986	80,999

TABLE 5.6
TOTAL TRADE AREA RETAIL FLOORSPACE DEMAND

Retail Spending by Merchandise Category	2016 (Year End Est.)		
	Total Floorspace Demand (sf)	Current City Retail Inventory (sf)	Total Residual Demand (sf)
Grocery & Specialty Foods	176,364	181,075	-4,711
Pharmacy	18,347	28,529	-10,183
Alcohol & Tobacco	48,277	50,426	-2,150
Personal Services	65,049	138,712	-73,663
Clothing & Apparel	54,944	84,211	-29,267
Footwear	15,868	4,741	11,128
Jewelry & Accessories	3,896	6,019	-2,122
Health & Beauty	15,937	34,961	-19,024
Home Furnishings & Accessories	33,335	19,744	13,591
Home Electronics & Appliances	23,758	38,301	-14,543
Home Improvement & Gardening	33,648	120,919	-87,271
Books & Multimedia	5,976	2,403	3,574
Sporting Goods & Recreation	9,435	22,781	-13,346
Toys & Hobbies	10,037	13,936	-3,899
Miscellaneous Specialty	31,726	83,700	-51,974
Full-Service F&B	28,629	76,645	-48,016
Limited Service F&B	16,039	59,768	-43,729
Entertainment & Leisure	39,141	63,119	-23,978
Auto Parts & Accessories	16,981	65,798	-48,817
Auto/RV/Motorsports Dealership	86,788	57,400	29,388
TOTAL RETAIL CATEGORIES ONLY	734,175	1,153,187	-419,012

5

Much of this decision is based on the relative proximity of Edmonton and its major metropolitan shopping areas in relation to the City of Fort Saskatchewan. This trend will become even more evident as Emerald Hills and Manning Town Centre continue to provide larger format Comparison retail, within a 25-minute drive time of the City of Fort Saskatchewan.

Part-Time Resident Supply - Demand

As profiled in the Demographic Section, the estimated 1,200 part time or temporary residents in the City of Fort Saskatchewan can be treated as residents during the time in which they reside at hotels in Fort Saskatchewan.

Accordingly, and based on a 22% overall market share of their total spending, **Table 5.2** reveals that part time residents could justify demand for approximately 10,000 sq. ft. Much of this demand is warranted for categories such as Grocery, Pharmacy, Personal Services, and Food & Beverage (Full and Limited Service formats).

Total Primary Trade Area (Including City of Fort Saskatchewan) Supply - Demand

Table 5.3 illustrates the combined demand resulting from the Total Primary Trade Area, which includes the City of Fort Saskatchewan, part-time residents and other neighbouring residents as delineated in the Trade Area. The figures reveal demand for approximately 600,000 sq. ft. of retail at a combined market share of approximately 60%.

To account for spending inflow originating outside of the City of Fort Saskatchewan, Cushing Terrell also quantified the Secondary Trade Areas.

Accordingly, each of these additional inflow areas and their resulting spending and market shares have been estimated to document the amount of floorspace attributable to each.

Secondary Trade Area West Supply - Demand

Each of the Secondary Trade Areas is much less populated than the Primary Trade Area, and as such the amount of demand attributable is lower.

For these Secondary Trade Areas, demand is in the form of Convenience and more lower-order Comparison or Department Store Type Merchandise such as everyday Fashion, Automobiles, or Leisure such as Sporting Goods and Toys.

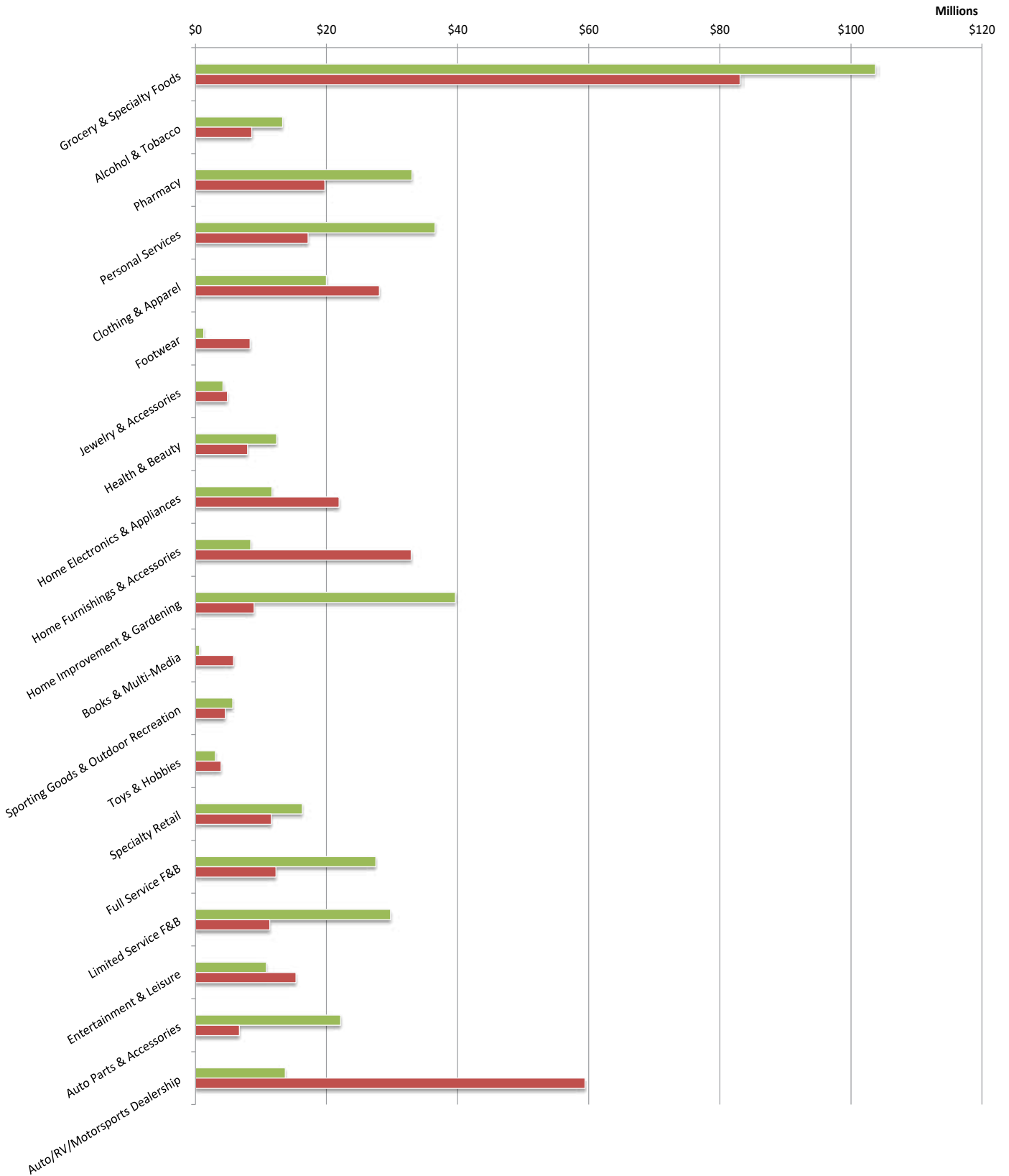
Table 5.4 reveals the demand for floorspace in the City of Fort Saskatchewan attributable to residents in the STA West at approximately 56,000 sq. ft. at a market share of 18%.

Secondary Trade Area East Supply - Demand

Table 5.5 reveals the demand for floorspace in the City of Fort Saskatchewan attributable to residents in the STA East at approximately 81,000 sq. ft. at a market share of 47%.

The STA East is seen to be the area with a higher market share than the STA West because much of the consumer base from the STA East will have to pass through the City of Fort Saskatchewan and thus can be intercepted or more conveniently accommodated by the City's shops and services.

FIGURE 5.1
CITY OF FORT SASKATCHEWAN RETAIL SPENDING SUPPLY AND DEMAND



5

Total Trade Area Supply - Demand

Table 5.6 aggregates the total demand for floorspace in the City of Fort Saskatchewan attributable to residents of the Primary and Secondary Trade Areas at approximately 735,000 sq. ft.

When compared against the current city's occupied retail inventory or supply at 1.15 million sq. ft., the difference between demand and supply equates to almost 420,000 sq. ft. of retail space. In other words, the City has 420,000 sq. ft. more retail space than current demand warrants.

If one factors into the equation forecasted population growth in the total trade area of approximately 7,300 over the next decade to 2026 (the majority of which will be in the City of Fort Saskatchewan), then estimated future floorspace demand could grow by approximately 185,000 to 220,000 sf (if applying per capita ratios of 25 to 30 sf per capita).

This estimate is based on growth in retail spending from 2016 levels at 2.5% per annum and further assumes an overall market share of **total** spending at 60% (current overall **total** market share is 49.7%) and a retail sales productivity of approximately \$378 per sq. ft.

When factoring future growth against the current negative residual demand, the forecasts suggests the City should focus its retail tenant recruitment strategy on specific tenants and merchandise categories that exhibit strong retail sales inflow potential. Examples include Grocery, Pharmacy, and Food & Beverage.

5.3

RETAIL GAP ANALYSIS QUANTIFICATION

The previous analysis quantified the supply vs. demand in terms of retail floorspace only. This next step involves quantifying the supply vs. demand in terms of retail sales performance and spending.

The process for calculating the retail surplus/inflow involved estimating the current annual retail sales for each respective merchandise category in the City of Fort Saskatchewan.

This estimated annual retail sales value was calculated by applying a retail sales productivity (using industry baseline averages as determined by the International Council of Shopping Centers) against the inventory and further sensitized by the classification of the retail store (refer to the detailed Retail Inventory in **Appendix A**).

Table 5.7 and Figure 5.1 illustrate the Retail Gap Analysis on a category-by-category basis for the City of Fort Saskatchewan.

Given the rate of market shares, it is not surprising that Fort Saskatchewan exhibits a high degree of retail sales leakage (outflow) of spending dollars.

TABLE 5.7
RETAIL INFLOW / OUTFLOW ESTIMATES

Merchandise Category	Est. Current Annual Sales by Category (SUPPLY)	Est. Fort Saskatchewan Expenditure Potential 2016 (DEMAND)	Fort Saskatchewan Outflow / Inflow Estimates	Fort Saskatchewan Outflow / Inflow Factor
Grocery & Specialty Foods	\$103,721,599	\$83,075,400.19	\$20,646,199	11.1
Alcohol & Tobacco	\$13,295,001	\$8,598,610.50	\$4,696,390	21.5
Pharmacy	\$33,026,130	\$19,730,876.78	\$13,295,253	25.2
Personal Services	\$36,557,464	\$17,176,991.82	\$19,380,472	36.1
Clothing & Apparel	\$19,984,681	\$28,053,121.71	-\$8,068,440	-16.8
Footwear	\$1,261,648	\$8,342,051.39	-\$7,080,403	-73.7
Jewelry & Accessories	\$4,206,539	\$4,886,199.12	-\$679,660	-7.5
Health & Beauty	\$12,372,834	\$7,956,941.75	\$4,415,892	21.7
Home Electronics & Appliances	\$11,670,047	\$21,911,213.72	-\$10,241,167	-30.5
Home Furnishings & Accessories	\$8,440,049	\$32,919,514.36	-\$24,479,466	-59.2
Home Improvement & Gardening	\$39,643,018	\$8,952,854.28	\$30,690,163	63.2
Books & Multi-Media	\$615,563	\$5,807,047.96	-\$5,191,485	-80.8
Sporting Goods & Outdoor Recreation	\$5,686,751	\$4,560,971.33	\$1,125,780	11.0
Toys & Hobbies	\$3,026,751	\$3,902,693.63	-\$875,943	-12.6
Specialty Retail	\$16,317,761	\$11,565,735.92	\$4,752,025	17.0
Full Service F&B	\$27,515,773	\$12,295,447.98	\$15,220,325	38.2
Limited Service F&B	\$29,769,081	\$11,349,644.29	\$18,419,437	44.8
Entertainment & Leisure	\$10,819,683	\$15,337,606.44	-\$4,517,924	-17.3
Auto Parts & Accessories	\$22,155,109	\$6,712,212.77	\$15,442,897	53.5
Auto/RV/Motorsports Dealership	\$13,700,677	\$59,423,714.18	-\$45,723,037	-62.5
VACANT				
TOTAL	\$413,786,157	\$372,558,850	\$41,227,307	5.2

5

5.4

RETAIL INFLOW & OUTFLOW

Cushing Terrell utilized a methodology of comparing Supply and Demand as generated by the Retail Spending patterns of the Trade Area Residents. This comparison of Supply and Demand results in a measure of Inflow or Outflow.

Inflow/Outflow conveniently measures the balance between the volume of supply (retail sales) generated by retail in Fort Saskatchewan and the demand (spending by households) within the same area.

Inflow (sometimes referred to as Surplus) in an area represents a condition whereby the supply exceeds the areas demand and where retailers are attracting shoppers that reside outside the normal or Primary Trade Area.

Outflow (sometimes referred to as Leakage) in an area represents a condition whereby a market's supply is less than the demand. In other words, retailers outside the market area are fulfilling the demand for retail products and thus demand is outflowing or leaking out of the normal or Primary Trade Area.

Table 5.7 reveals a pattern of spending that again clearly substantiates the idea that the City of Fort Saskatchewan has a more localized Retail Trade Area with commensurate sales outflow.

In fact, it is common for many markets, particularly those closer to major metropolitan areas to have many areas where sales outflow occurs.

The Inflow/Outflow factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total inflow) to -100 (total outflow). A positive value represents inflow of retail opportunity where customers are drawn in from outside the trade area. A negative value represents outflow of retail sales, a market where customers are drawn outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales.

In the case of Fort Saskatchewan, **Table 5.7** reveals a pattern in which more day-to-day types of categories are generating inflow and surplus sales and could thus be targeted by retailers.

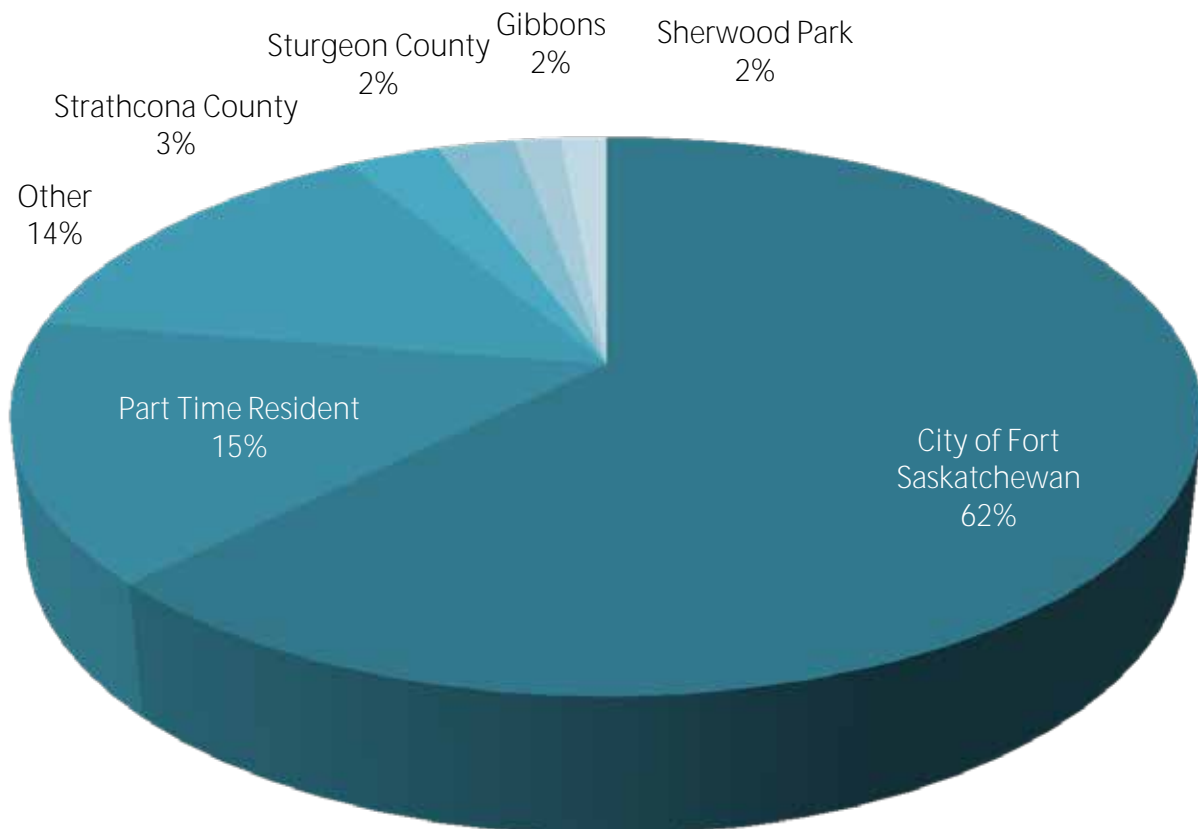
Conversely, the categories exhibiting outflow are all the types of categories that people are prepared to drive 30 - 45 minutes to access, which brings into play a wide array of projects that even includes South Edmonton Common and West Edmonton Mall. The recently completed northeast component of the Anthony Henday will increase accessibility to areas like West Edmonton Mall.

Given Fort Saskatchewan's retail trade area demographics and spending attributes, specific target categories include Grocery, Pharmacy, Personal Services, Toys & Hobbies, Full & Limited Service F&B, Health & Beauty.

A market like Fort Saskatchewan in which inflow exists for specific categories and where it would be difficult to provide a comparison offering that could be competitive in the market is more poignant in that retailers can have the confidence in knowing that demand is already present in a market.



FIGURE 6.1
CONSUMER SURVEY RESPONDENT BY ORIGIN (2014)



6

CONSUMER INTERCEPT SURVEY

6.1

INTRODUCTION

As an integral part of the Retail Market & Gap Analysis, a Consumer Intercept Survey was originally conducted in 2014 which the residents of Fort Saskatchewan and the surrounding communities were randomly interviewed.

Respondents were interviewed at strategic locations (Dow Centennial Centre, Cornerstone Centre, Downtown and the Kanata Hotel) in the community to ascertain their preferences for merchandise categories/store types and retailers in the City of Fort Saskatchewan. Other important areas of information gathered through this process included collecting data associated with where residents currently conduct the majority of their shopping, how frequently they shop, how much they spend and what types of formats/stores they prefer.

In total, 200 respondents provided a sample size which ensured the study was statistically valid with a confidence level of 95% and a margin of error of 6.93. Utilizing the Statistical Package for the Social Sciences (SPSS) the data has been prepared in correlation with the study's objectives.

The questionnaire tool and complete Consumer Survey results are provided in **Appendix C**.

6.2

RESPONDENT DEMOGRAPHICS

As a foundation for the Consumer Intercept Survey, the locations were chosen to get a valid cross-section of resident and consumer traffic flow in various areas throughout the City.

An important component to determining and validating the Retail Market & Gap Analysis quantification is ensuring that a representative sample of the trade area is interviewed. **Figure 6.1** illustrates the breakdown of Respondent residences for the Consumer Intercept Survey, revealing 62% of respondents currently live in the City of Fort Saskatchewan, with a further dispersed representation from surrounding counties and towns.

Furthermore, **Figure 6.2** illustrates a postal code "heat map" that shows density from which Survey Respondents originated using FSA codes which are the first 3 digits of a postal code (for privacy protection).

Figure 6.2 clearly illustrates a consistent pattern with the Retail Trade Area documented in **Figure 4.1**, in which the majority of patronage is sourced from the City and surrounding towns, but emanates northwest, north and east, with less dependence on populations to the south.

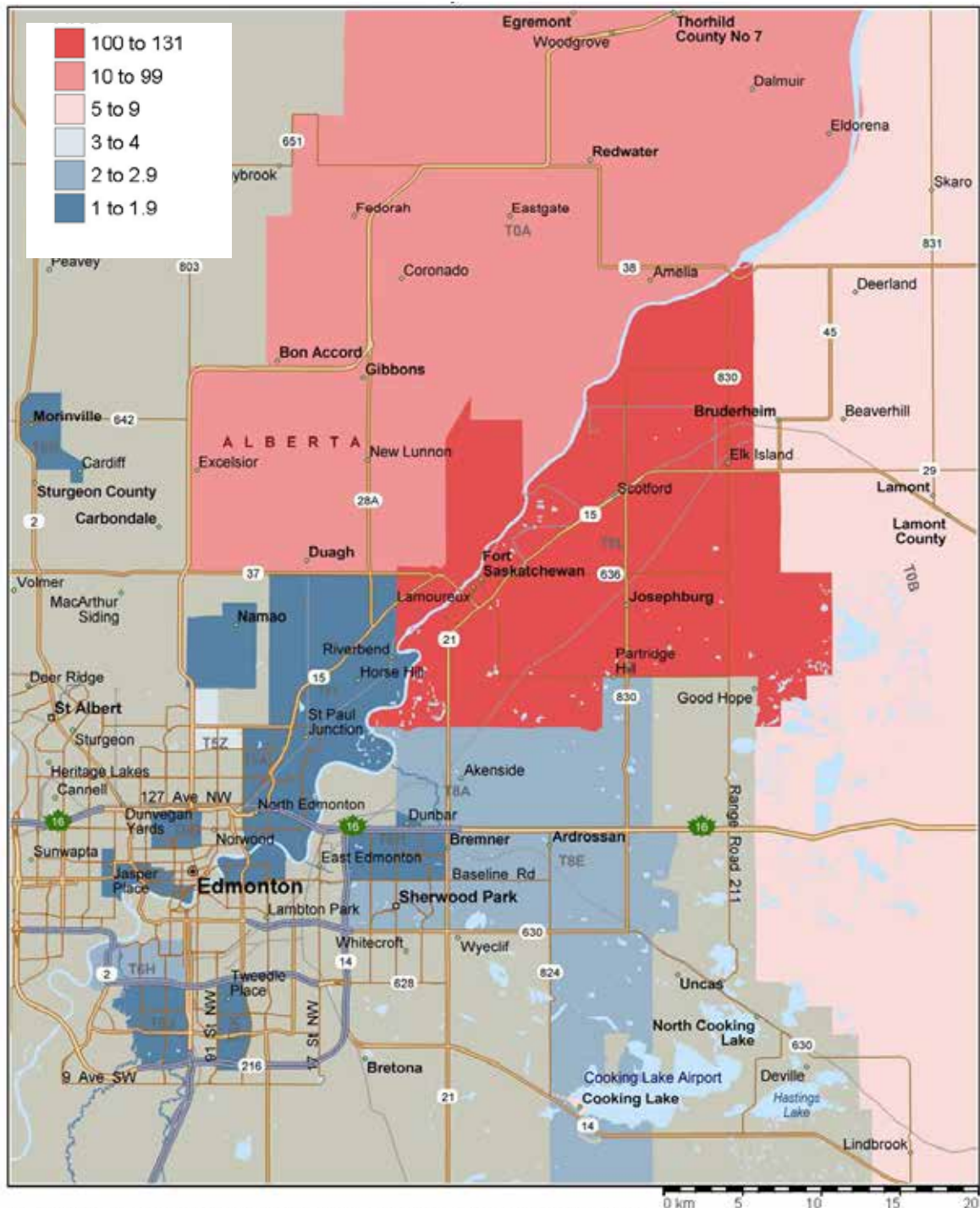
Figures 6.3 and 6.4 provide a snapshot of the demographics of the respondents and further validate the statistical demographics by revealing a similar age profile dominated by the 25-44 year old age cohort. Furthermore, 25% of the respondents have a household income of greater than \$125,000 and just under 50% of respondents were above \$100,000.

6.3

PREFERRED SHOPPING LOCATIONS

Consumer Survey respondents were specifically asked the following questions pertaining to their current shopping habits:

FIGURE 6.2
 CONSUMER SURVEY RESPONDENT BY POSTAL CODE (FORWARD SORTATION AREA)



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FIGURE 6.3
CONSUMER SURVEY AGE PROFILE
ALL RESPONDENTS

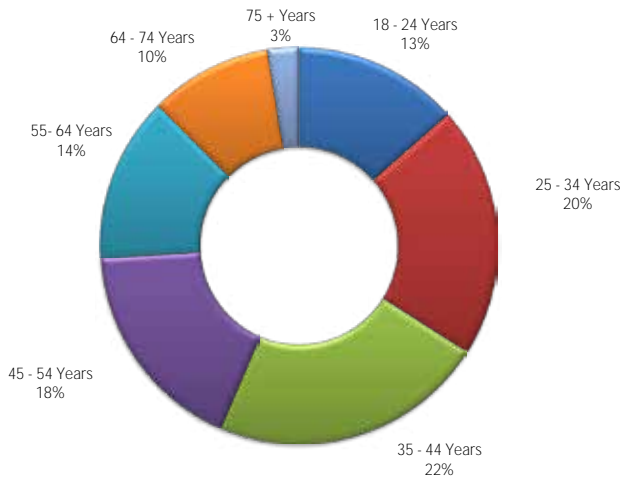
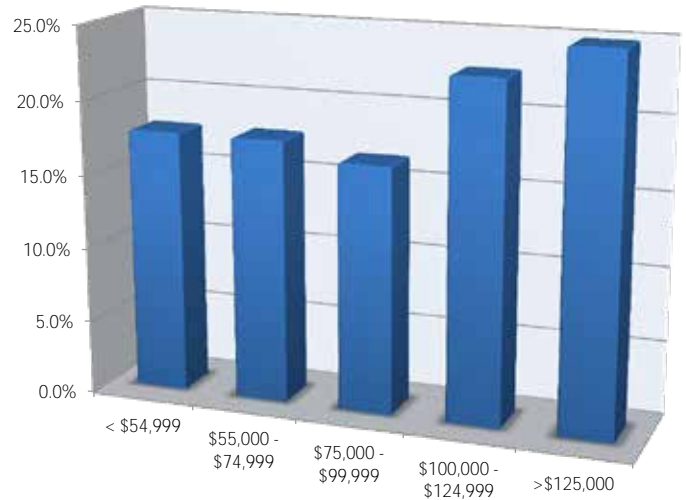


FIGURE 6.4
CONSUMER SURVEY INCOME PROFILE
ALL RESPONDENTS



- What is your primary shopping centre for convenience goods?
- What is your reason for choosing this location?
- What is your primary shopping centre for comparison goods?
- What is your reason for choosing this location?
- What do you most like about the shopping opportunities in Fort Saskatchewan?
- What do you dislike the most about the shopping opportunities in Fort Saskatchewan?

Primary Convenience Shopping Centre

Figures 6.5 and 6.6 indicate that Cornerstone and Safeway is the dominant location for consumers to shop for convenience necessities, such as groceries. The primary reason for this overwhelming dominance is the price of the goods/merchandise as well as the fact that Cornerstone is central to their primary residence and allows for one-stop-shopping.

From a convenience perspective COSTCO, on the other hand did not resonate as highly as expected, although it does rank quite high among the types of shops desired in the community. This would seem to represent a disconnect in consumers’ needs vs. wants.

Figures 6.5 to 6.15 identify the current shopping environment preferences for respondents and reveals expected results as it pertains to locations and decision-making factors. But it also yields insight into what consumers are expecting in the shopping environments, as well as in the merchandise mix and overall offering.

FIGURE 6.5
WHAT IS YOUR PRIMARY CONVENIENCE SHOPPING CENTRE?

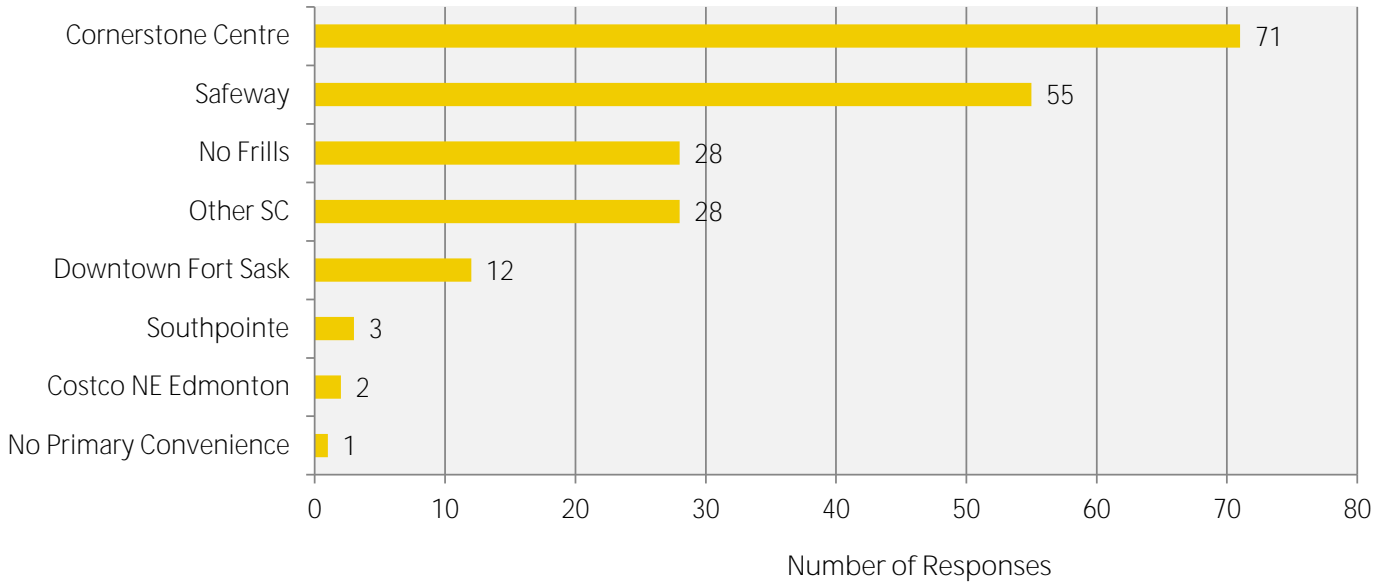
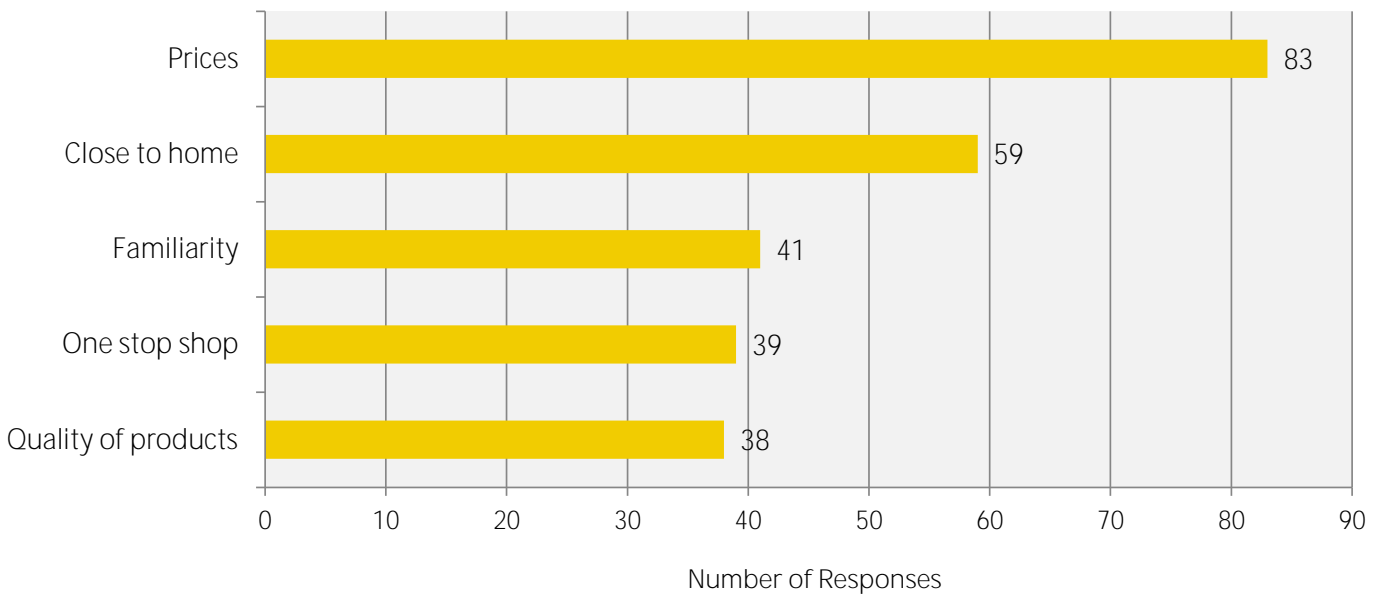


FIGURE 6.5
WHAT IS YOUR PRIMARY REASON FOR CHOOSING A CONVENIENCE SHOPPING CENTRE?



6

Primary Comparison Shopping Centre

Figures 6.7 and 6.8 illustrate that Cornerstone is also the most dominant shopping centre for consumers looking for comparison merchandise, such as Clothing, Footwear, Books, Electronics, House & Home etc.

However, the “other” category which comprises centres such as South Edmonton Common and West Edmonton Mall ranks very highly also in terms of the number of responses.

From a specific location, the Sherwood Park Mall garnered 43 responses suggesting that this is a well-used retail node and given that it is approximately 25 minutes drive time, it is likely to continue as a popular location.

In terms of the reasons for shopping at an identified Comparison shopping location, prices are the most common response, while close to home, familiarity and the ability to one-stop-shop are also important. These factors likely explain the popularity of the Sherwood Park Mall for Fort Saskatchewan residents.

The retail inflow and outflow identified previously clearly illustrates that consumers have a strong willingness to visit retail nodes outside of Fort Saskatchewan for their Convenience and Comparison goods and services.

This trend combined with the population and spending dynamics reinforces the need for Fort Saskatchewan to be cautious in the retailers it targets, since it will be hard to compete against current and emerging comparison retail nodes.

Given the price consciousness of respondents,

Fort Saskatchewan could target price points and broader market appeal tenants. For example, tenants such as Real Canadian Superstore, Old Navy, Value Village or JYSK who may not have Fort Saskatchewan on their radar, could be well-served to be presented with the opportunity, so long as another store in their network strategy is feasible and they are not located at Emerald Hills.

The challenge for the majority of fashion retailers would be the requirement for an indoor retail space, such as that provided at Sherwood Park Mall or the requirement for co-tenancy of other complementary or competitive brands.

Figure 6.14 and the detailed full response in **Appendix C** illustrates a range of tenants that the City or its developers could target. While there are retailers that may not be a realistic fit for Fort Saskatchewan, there are others whom respondents have indicated a preference to have in the City of Fort Saskatchewan that are compatible.

6.4

LIKES & DISLIKES OF RETAIL IN FORT SASKATCHEWAN

Figures 6.9 and 6.10 highlight the “likes” and “dislikes” of the respondents as it relates to the current shopping opportunities in Fort Saskatchewan.

Overwhelmingly, respondents like the fact that the shops are close to home and meet their basic needs as well as a very strong response towards supporting local businesses and Downtown Fort Saskatchewan.

FIGURE 6.7

WHAT IS YOUR PRIMARY COMPARISON SHOPPING CENTRE?

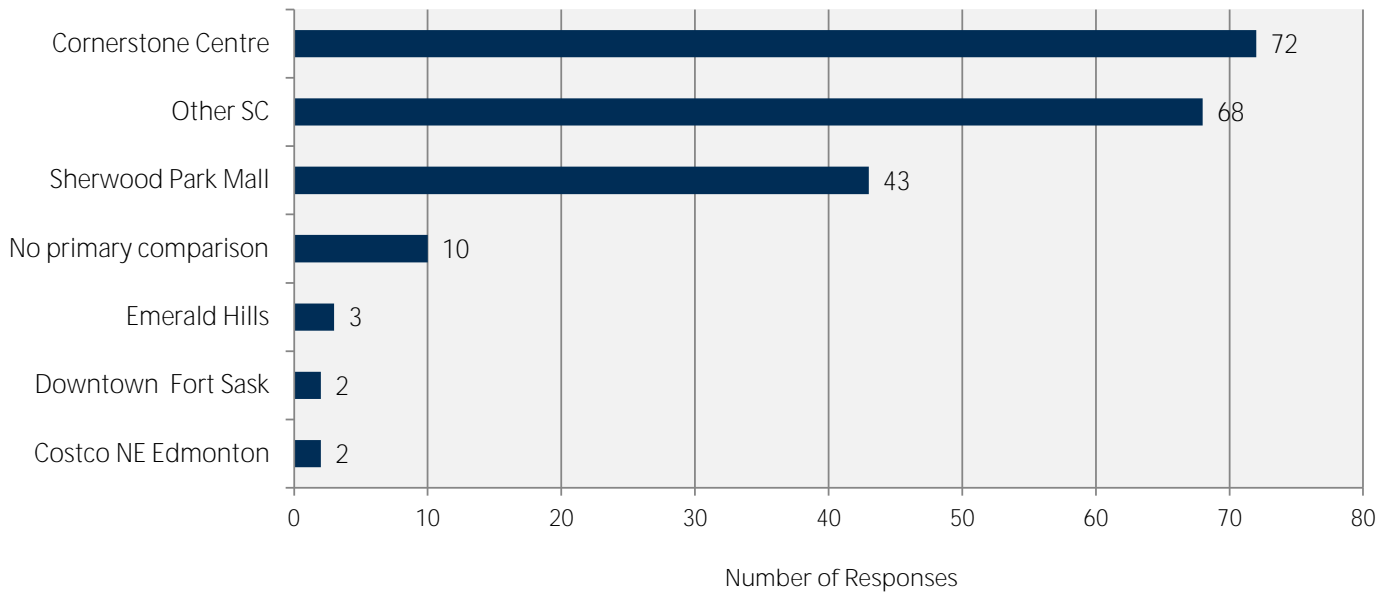
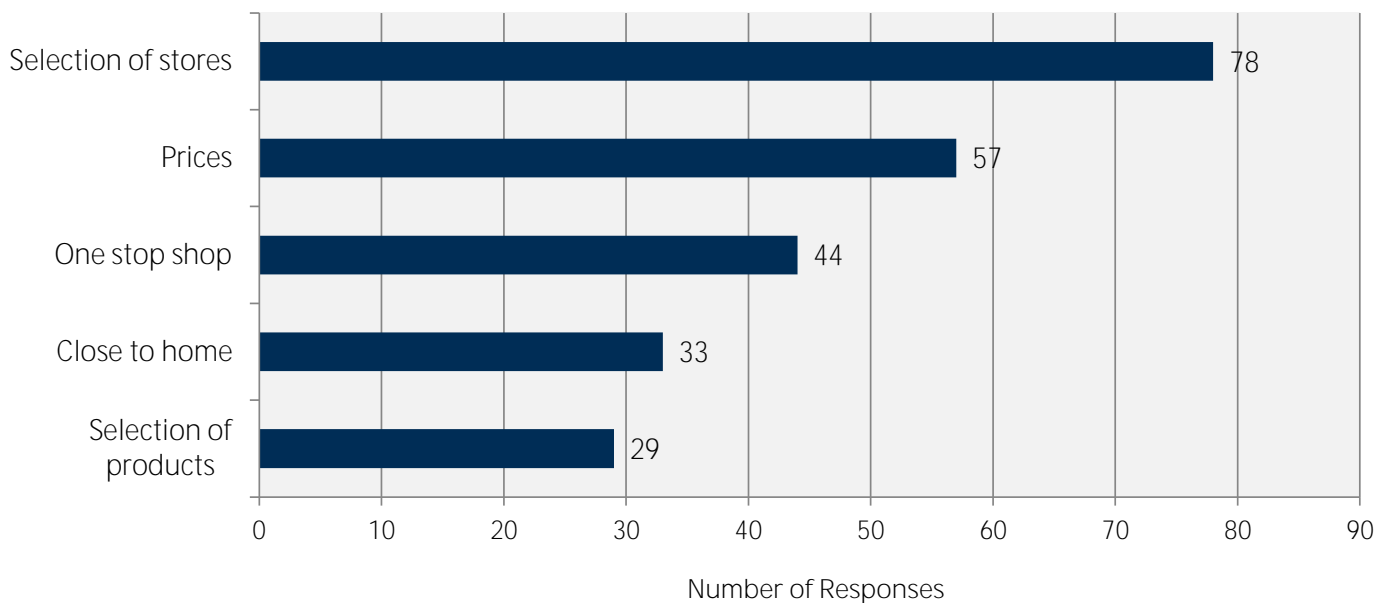


FIGURE 6.8

WHAT IS YOUR PRIMARY REASON FOR CHOOSING A COMPARISON SHOPPING CENTRE?



6

FIGURE 6.9
WHAT DO YOU LIKE MOST ABOUT SHOPPING IN FORT SASKATCHEWAN?

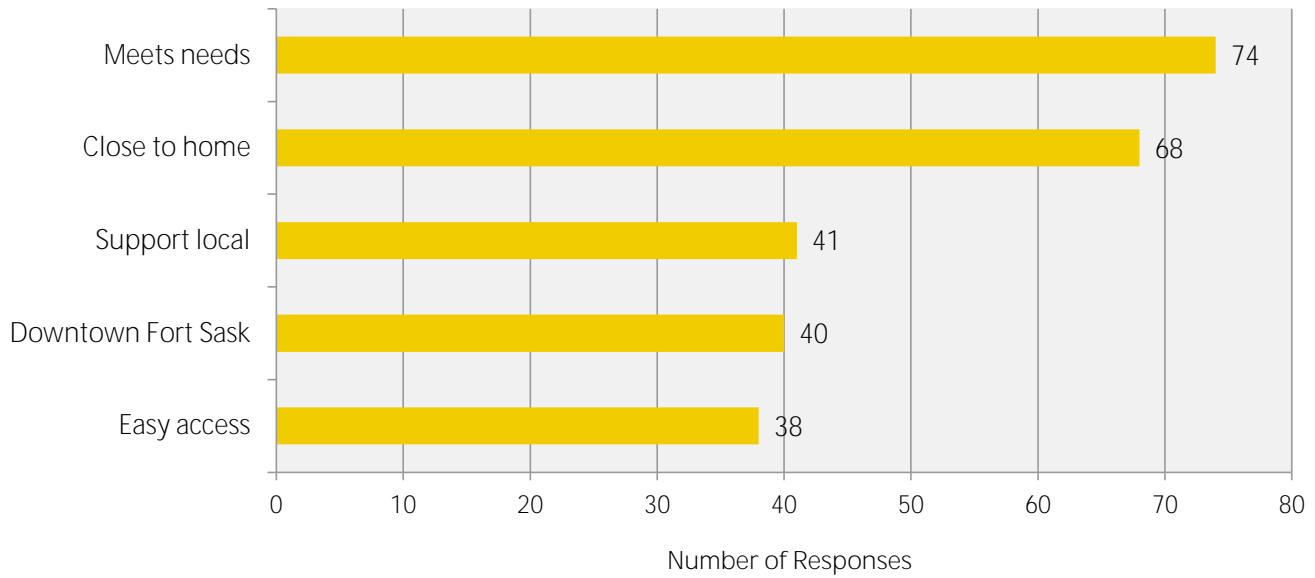


FIGURE 6.10
WHAT DO YOU DISLIKE MOST ABOUT SHOPPING IN FORT SASKATCHEWAN?

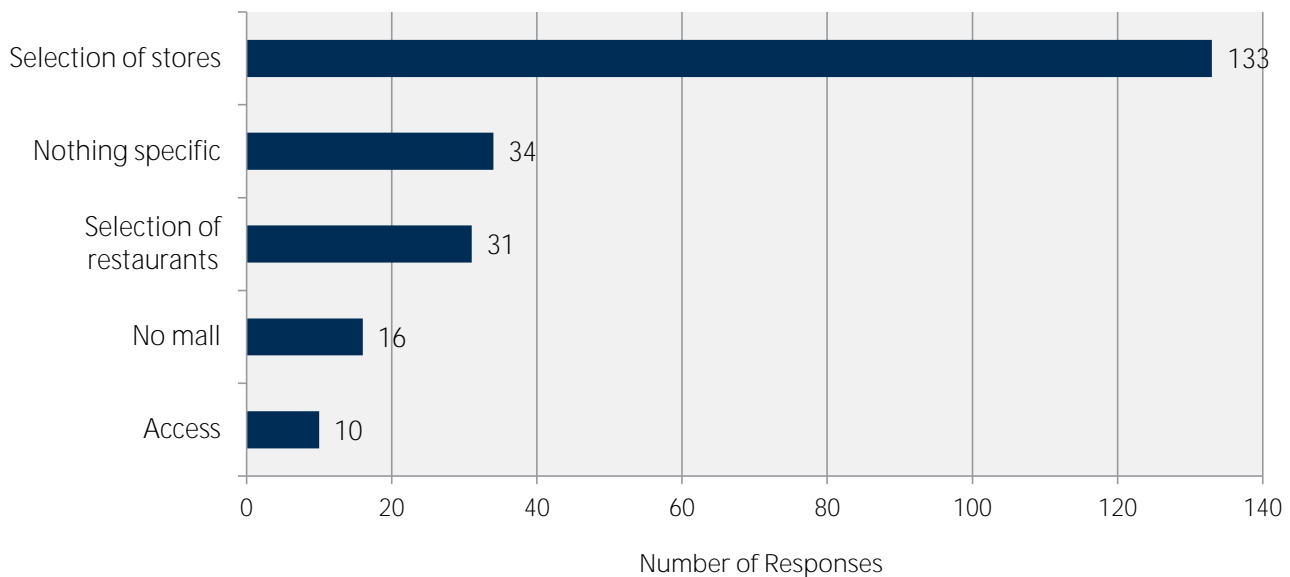
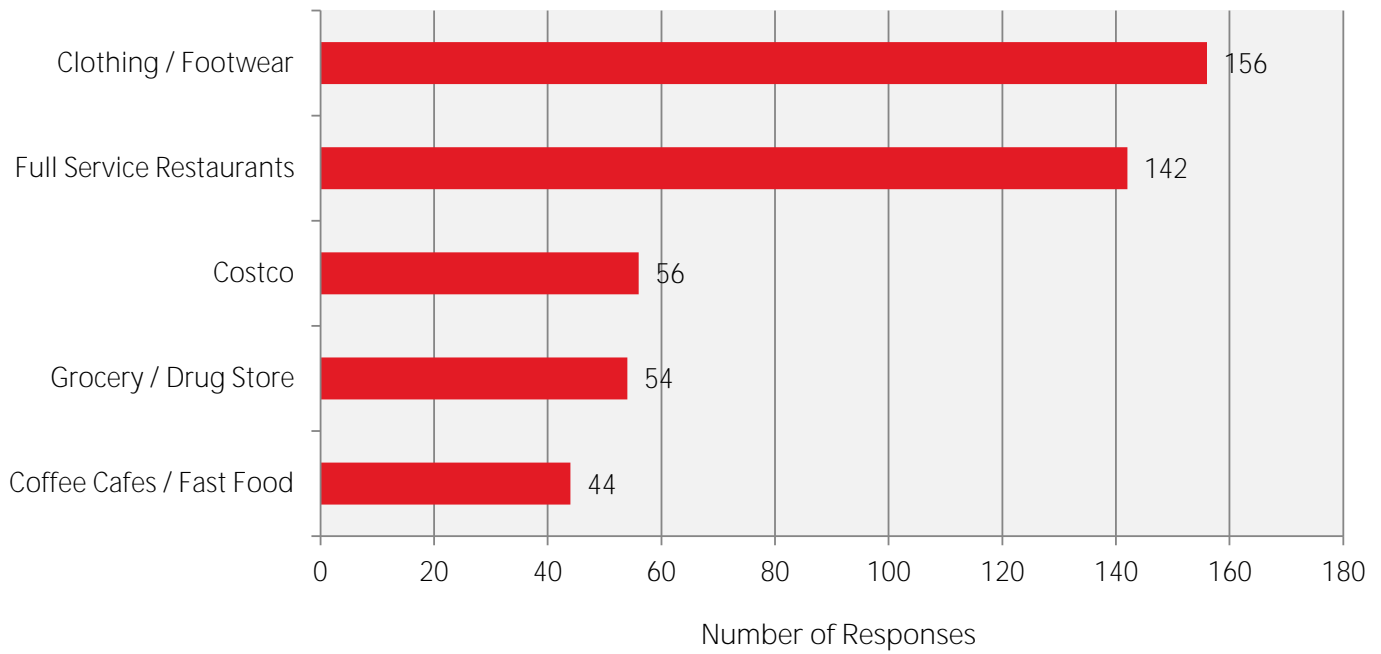


FIGURE 6.11

WHAT NEW STORES/SERVICES WOULD INCREASE YOUR SPENDING IN FORT SASKATCHEWAN?



6

It is worth reiterating that with the City's current 'relative' balance of supply to demand that the Downtown should be a key consideration when thinking of new retail developments, other than those already approved and under construction, such as Westpark.

It is encouraging that respondents have such a high response rate to supporting local and Downtown Fort Saskatchewan.

The selection of shops and restaurants were each mentioned as a dislike. As the Fort Saskatchewan market continues to grow, it is to be expected that respondents will want more shops and services. Achieving the balance of the types of shops and services the residents want with the types of shops and services that are compatible with the City's demographics, trade area and development projects will be the key to success.

The trend of a market to want a better selection of shops is a reflection on the aspirational nature of the consumer: they are responding positively to the growth and introduction of stores in the market, but still want to have more retailers that they are accustomed to seeing in other markets such as Edmonton, even if the reality is that they may not locate in Fort Saskatchewan.

This is most accurately depicted in **Figure 6.11** which reveals overwhelming respondents' desires for more clothing/footwear. While there are brands in the market, such as Old Navy or Children's Place that would be compatible fits for Fort Saskatchewan, the reality is that the city is more likely to attract full service restaurants.

Figures 6.12 through 6.14 provide a list of

shops and restaurants that could locate in Fort Saskatchewan's various retail nodes/formats.

6.5 DESIRED SHOPS & SERVICES

Figures 6.11 through 6.15 illustrate the responses to questions that sought the following:

1. What New Stores/Services would increase your spending in Fort Saskatchewan? (**Figure 6.11**)
2. What Full-Service Restaurants do you want to see in Fort Saskatchewan? (**Figure 6.12**)
3. What Limited-Service Restaurants do you want to see in Fort Saskatchewan? (**Figure 6.13**)
4. What Retail Stores do you want to see in Fort Saskatchewan? (**Figure 6.14**)
5. What types of stores do you want to see in Fort Saskatchewan? (**Figure 6.15**)

Referring to **Figure 6.11**, which allows for multiple responses, respondents overwhelmingly want to see more Clothing & Footwear stores (156 responses) and Full-Service Restaurants (142 responses) in Fort Saskatchewan. An increase in the quality and quantity of the above two categories would be well-received by the respondents and overall trade area residents.

Similarly, though to a slightly lesser degree, Costco was singled out as a retailer desired in Fort Saskatchewan.

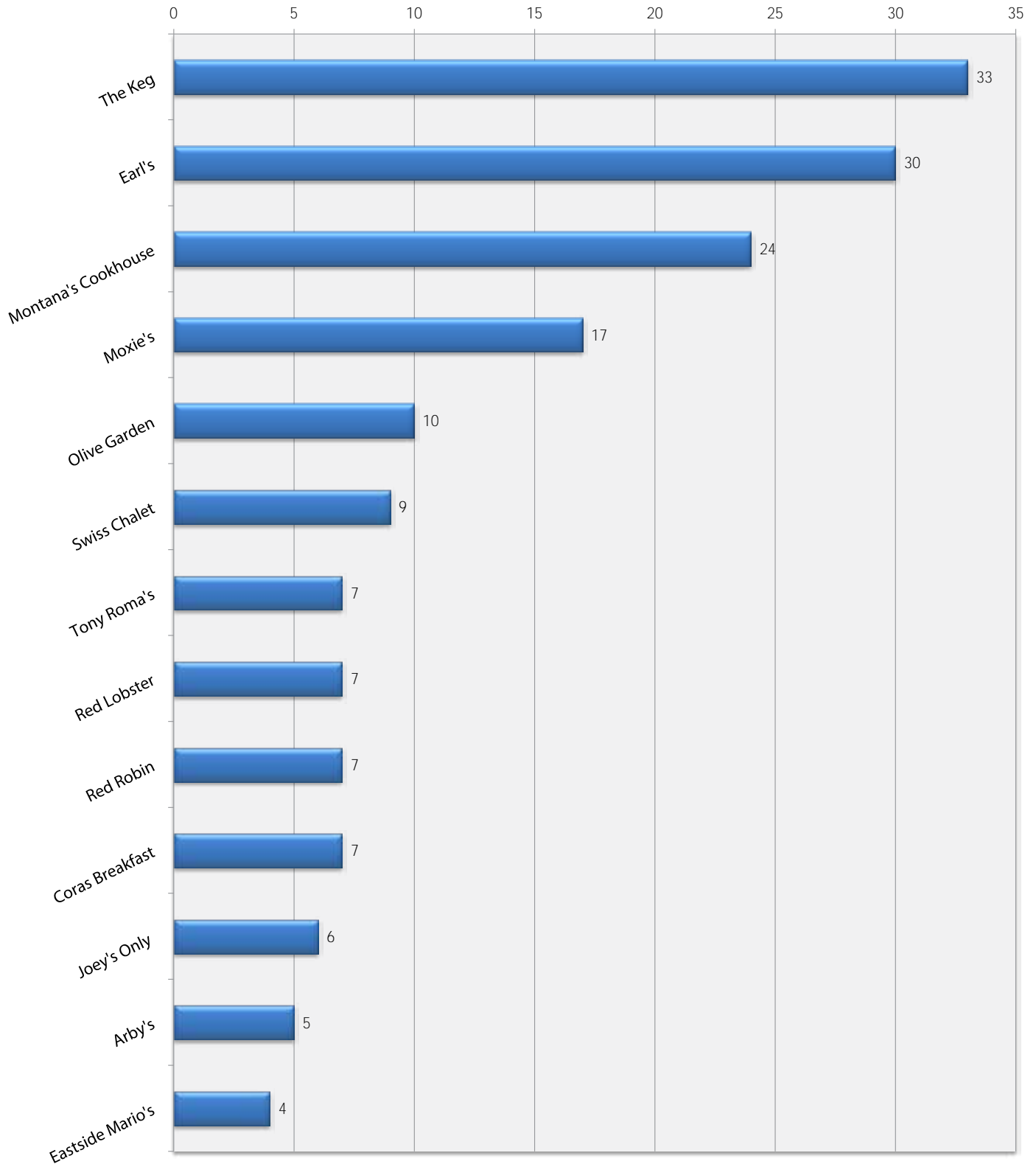
A reflection of the more localized nature of Fort Saskatchewan's trade area is evidenced in the desire to have more Grocery/Drug Store and Limited Service Food & Beverage in the City. These are the types of tenants that should be prioritized for targeting along with Full Service Restaurants.

THE KEG & EARL'S

MOST CITED RESTAURANTS DESIRED BY CONSUMER RESPONDENTS

FIGURE 6.12

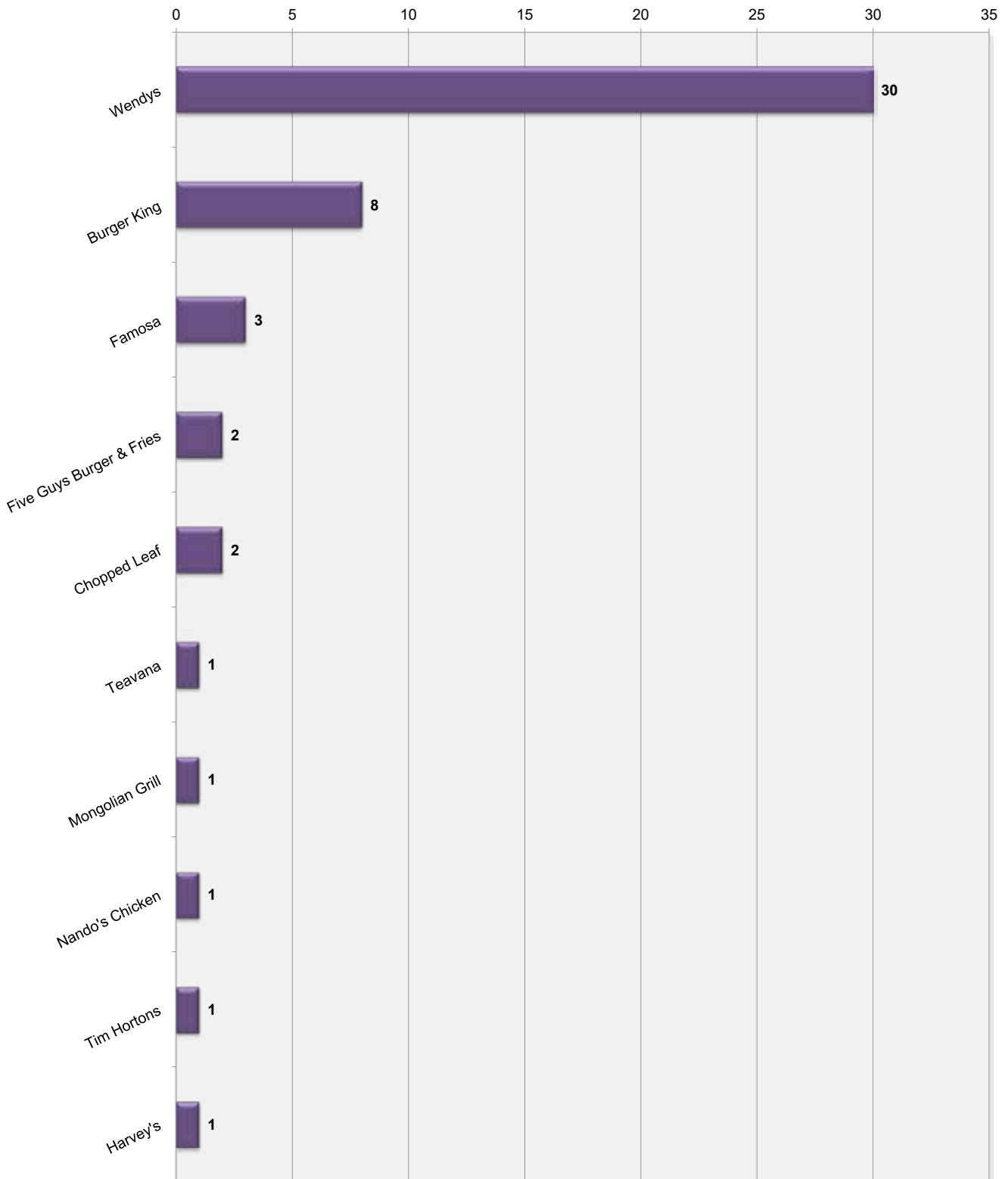
WHAT FULL-SERVICE RESTAURANTS DO YOU WANT TO SEE IN FORT SASKATCHEWAN?



6

FIGURE 6.13

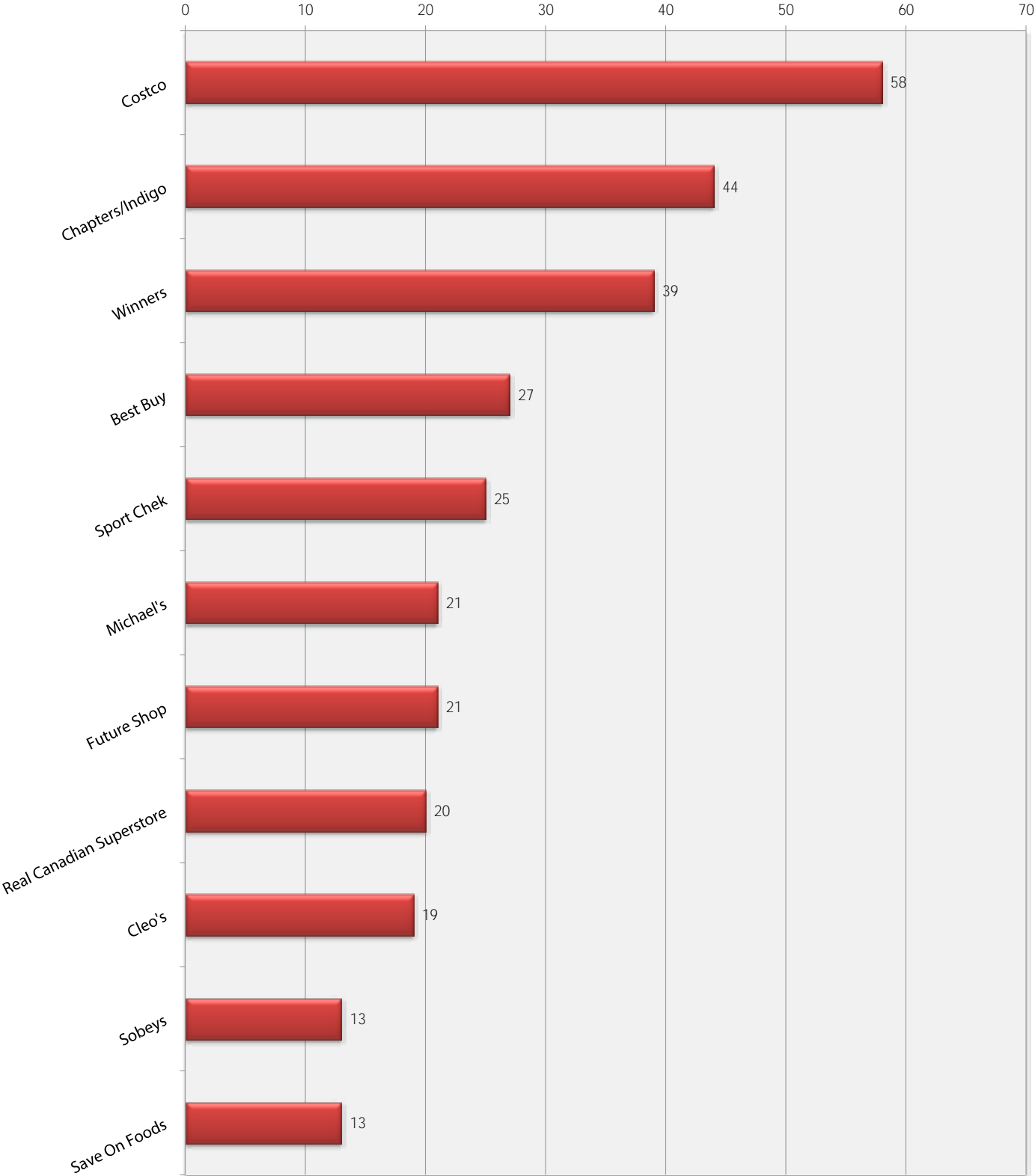
WHAT LIMITED-SERVICE RESTAURANTS DO YOU WANT TO SEE IN FORT SASKATCHEWAN?



COSTCO

MOST CITED RETAILER DESIRED BY CONSUMER RESPONDENTS

FIGURE 6.14
WHAT RETAIL STORES DO YOU WANT TO SEE IN FORT SASKATCHEWAN?



6

FIGURE 6.15
WHAT TYPES OF STORES DO YOU WANT TO SEE IN FORT SASKATCHEWAN?

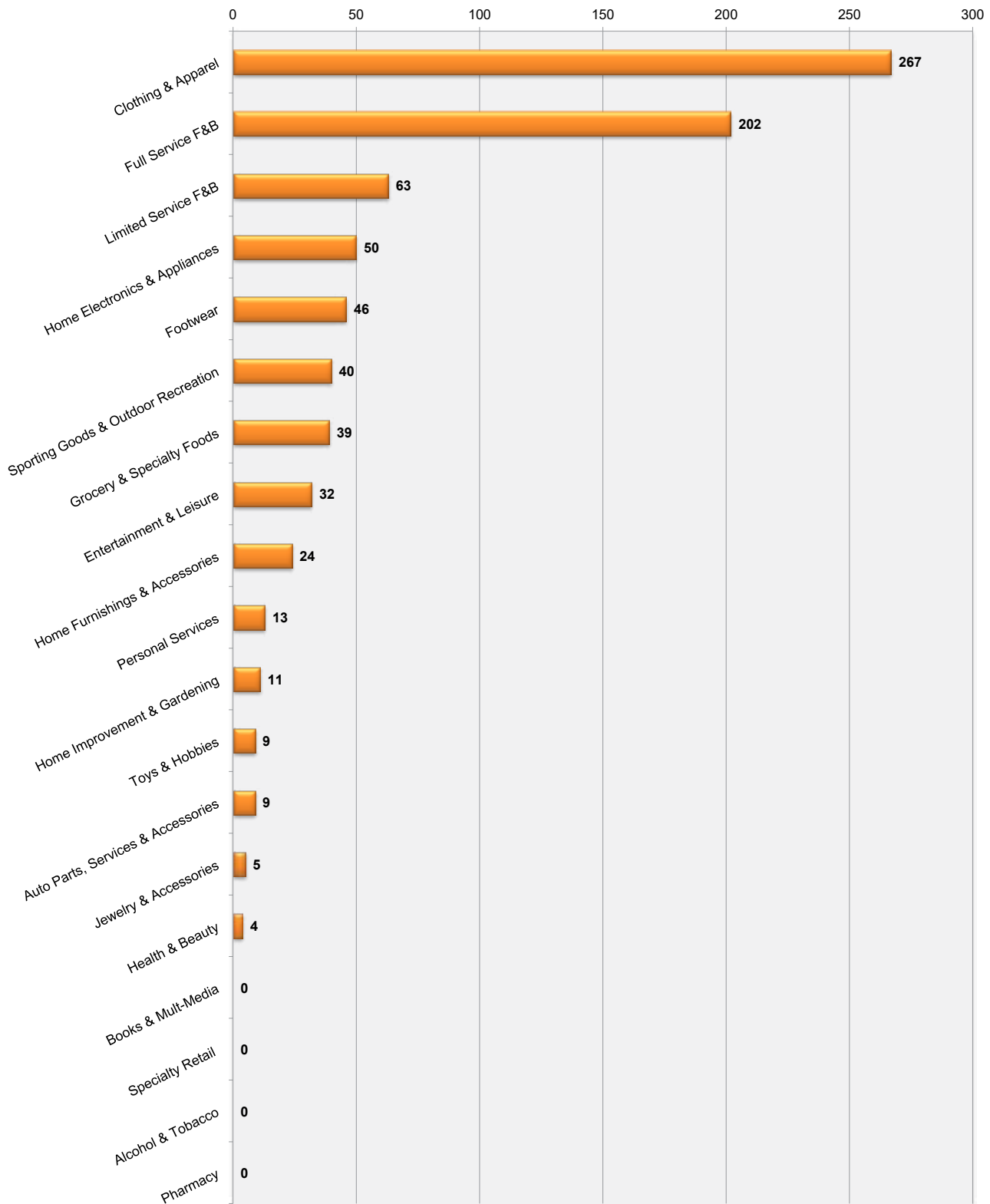


FIGURE 6.16

SPENDING VERSUS IMPORTANCE RATINGS FOR ALL RESIDENT RESPONDENTS

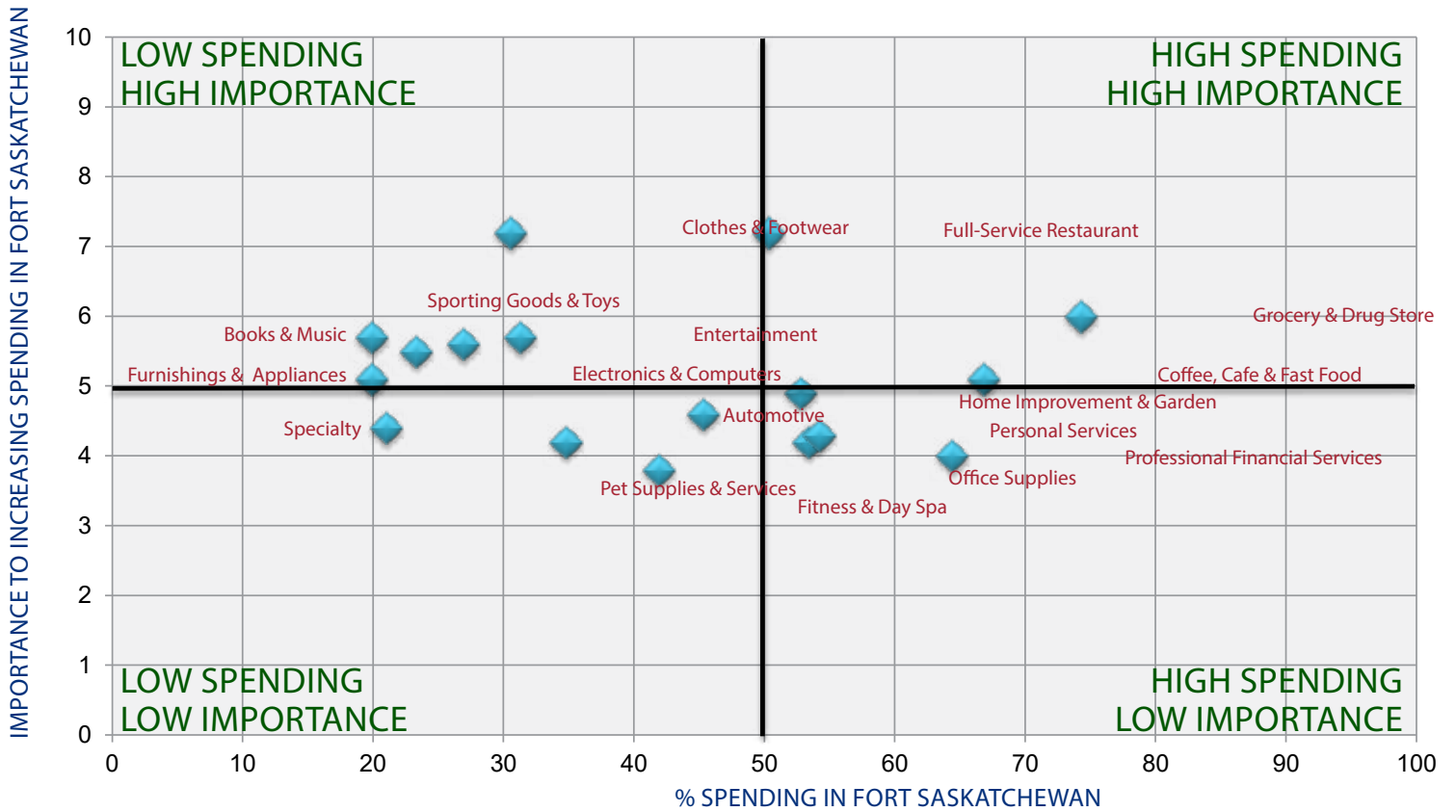
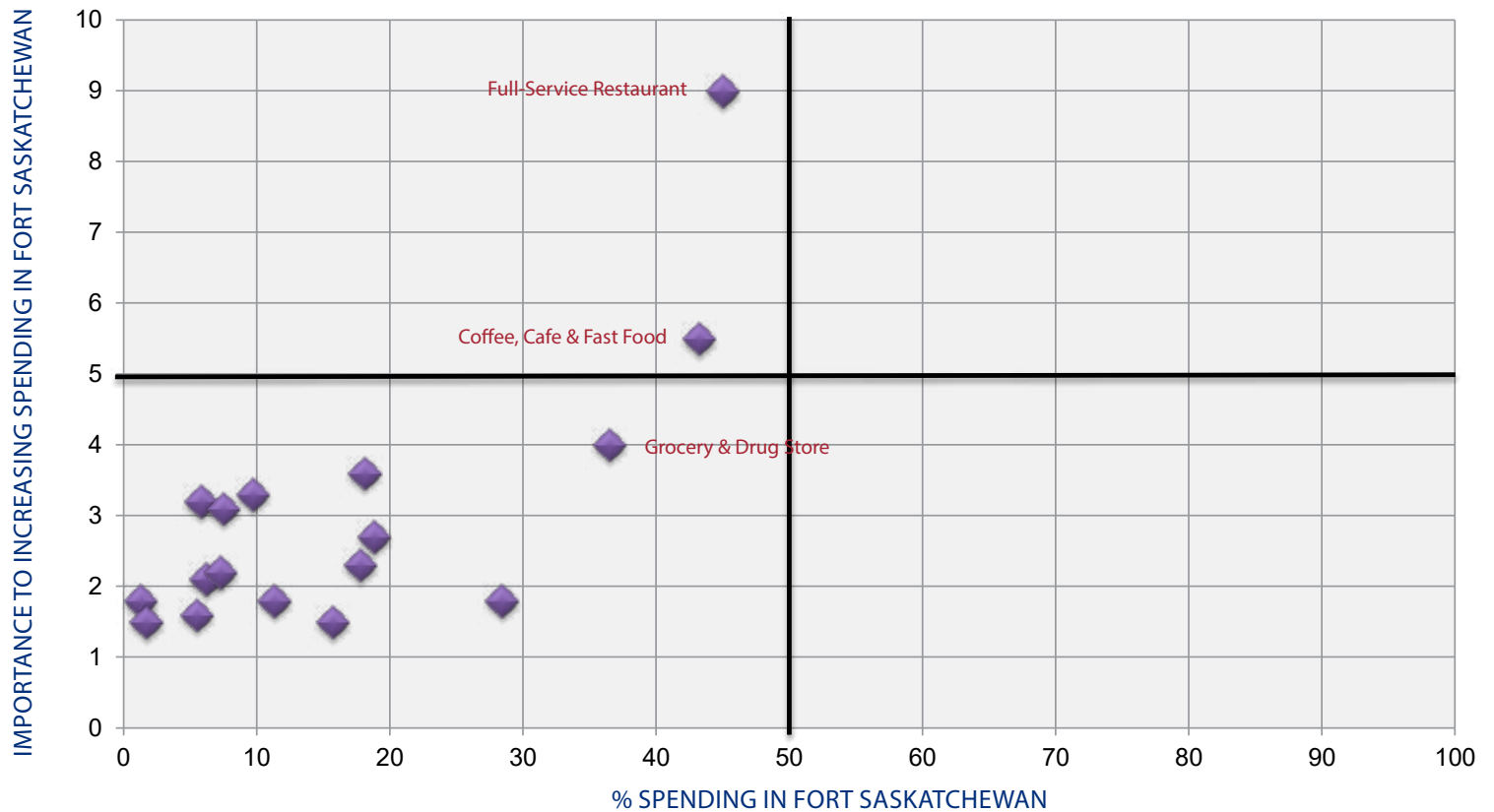


FIGURE 6.17

SPENDING VERSUS IMPORTANCE RATINGS FOR TEMPORARY RESIDENTS



6 FULL-SERVICE F&B GROCERY & DRUGSTORE

MOST SOUGHT RETAIL CATEGORIES BY CONSUMER RESPONDENTS

In response to the desire to see more Full-Service Restaurants (i.e. those with table service) in Fort Saskatchewan, **Figure 6.12** specifically asked respondents for tenant names. This question elicited a significant response for the following:

1. *The Keg*
2. *Earl's*
3. *Montana's*
4. *Moxie's*

Full-Service Restaurants, such as those identified are most likely to locate in high customer traffic and popular shopping areas such as Cornerstone or Westpark.

While Fort Saskatchewan has a strong contingent of Limited Service Restaurants (i.e. those without table service), there was still a strong response indicated for more Limited Service Restaurants. What is most compelling from the responses however is that Wendy's was the overwhelming identified retailer sought in the community.

Cafes and coffee shops continue to be in high demand with optimal locations available throughout the City.

This suggests opportunities for more local independents, for whom areas in the Downtown core could be strong. In downtowns such as Fort Saskatchewan's where external development pressures have created challenges, it is often the local merchants and businesses that have the ability to create a shop local culture in redefining downtown spaces.

Figure 6.14 illustrated a desire to have many formats that would be junior box or larger in size.

It is reasonable to assume that these tenants, some of whom are already at Emerald Hills, such as Winners, would be more enticed to locate in Emerald Hills than Fort Saskatchewan simply given the trade area penetration.

There may be some degree of opportunity to attract these users, though it would probably be in the best interest of the City to target smaller retailers that could infill in the existing retail nodes with targeted categories and retailers that are inherently more compatible with Fort Saskatchewan's trade area.

6.6

ALL RESPONDENTS SPENDING VERSUS IMPORTANCE

Figures 6.16 to 6.21 take a more honed in approach in looking at the Consumer Responses by seeing where differences may exist in spending and importance ratings by Full Time vs. Part-Time Respondent, Age Cohort and Household Income.

The initial process is to illustrate for ALL Respondents, the correlation or possibly lack thereof between the amount of spending in Fort Saskatchewan on Retail Categories and the Respondents' importance for a respective category in increasing their spending in the City.

The results shown diagrammatically in **Figure 6.16** shows that the categories of Full Service Restaurants and Grocery/Drug Store have the highest proportion of spending inside Fort Saskatchewan, yet still have among the highest importance ratings for retaining further spending.

FIGURE 6.18
PERCENTAGE SPENDING IN FORT SASKATCHEWAN BY RESPONDENT AGE COHORT

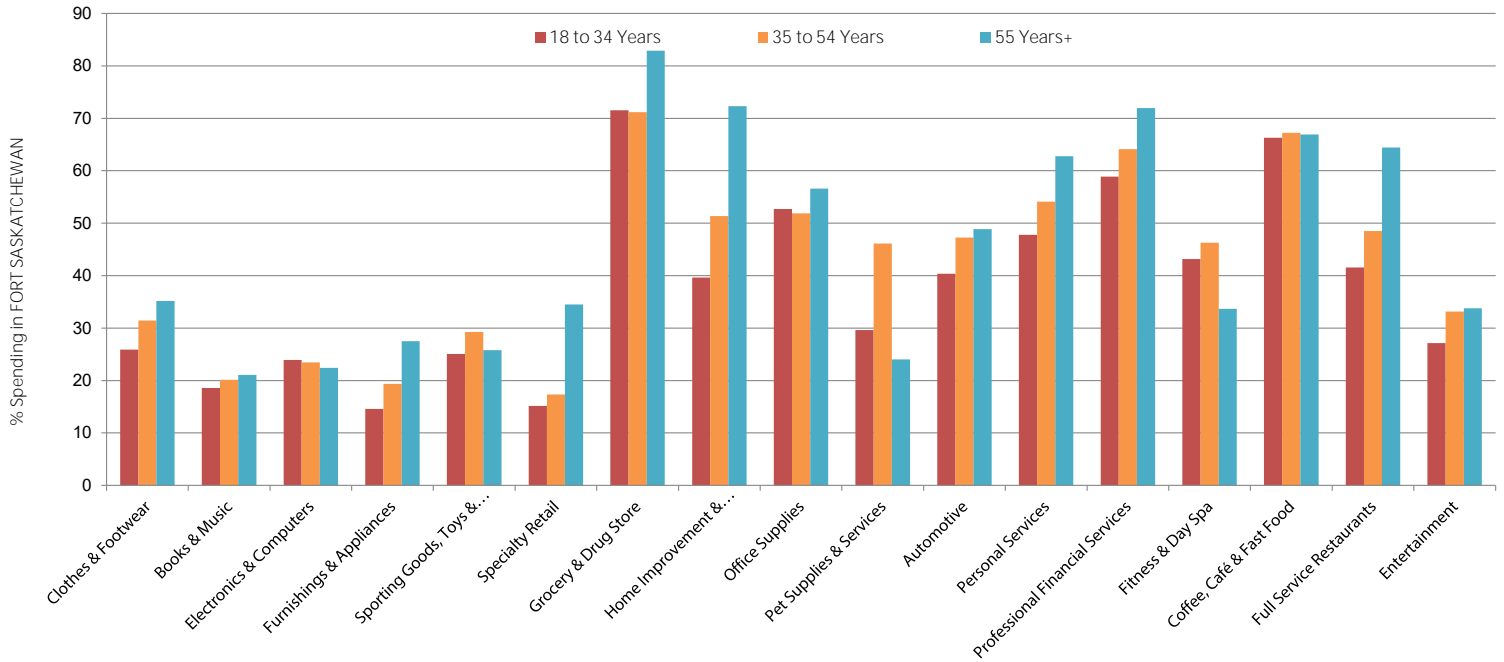
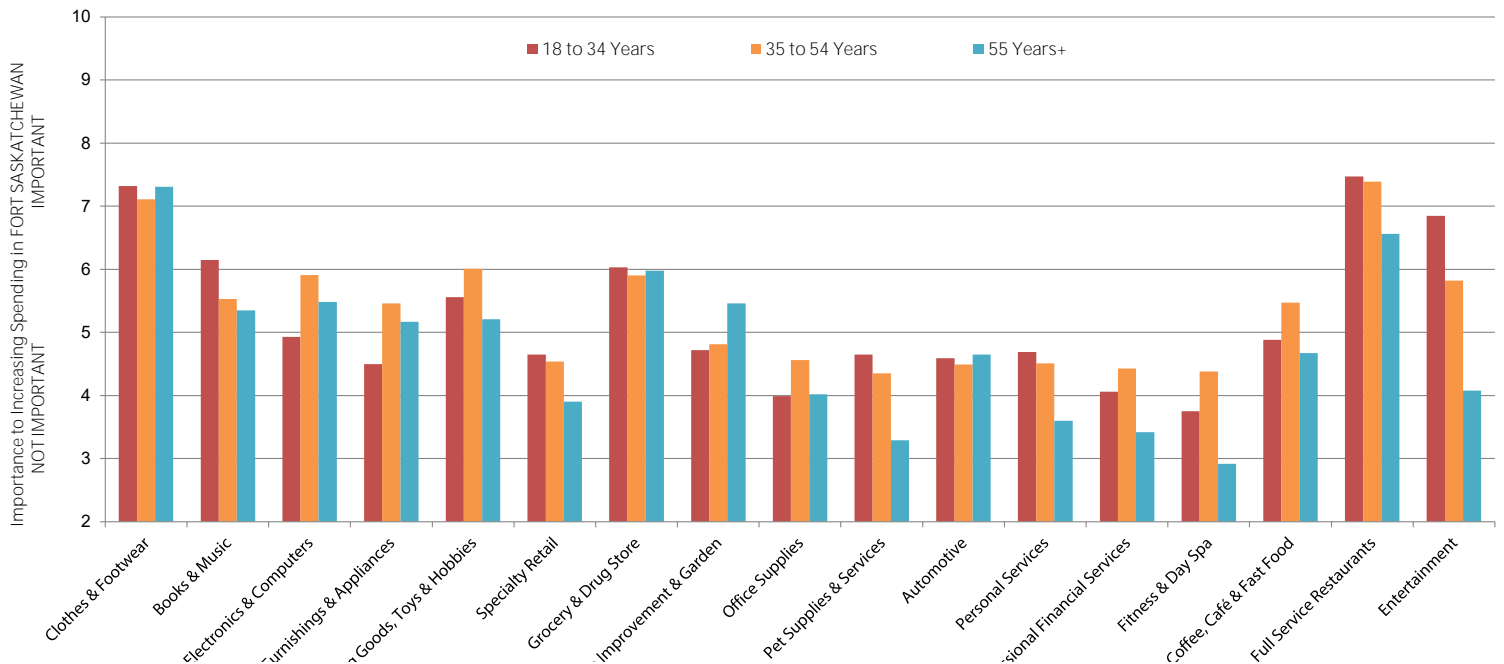


FIGURE 6.19
IMPORTANCE RATING TO INCREASE SPENDING BY RESPONDENT AGE COHORT



6

Although spending on Clothes and Footwear is not high in Fort Saskatchewan, **Figure 6.16** does imply through its importance rating that if more Clothes and Footwear were introduced more spending could be retained in Fort Saskatchewan.

Figure 6.17 illustrates the part-time residents spending vs. importance and reveals a clear distinction that full service restaurants would be the most important retail category to increasing their spending in Fort Saskatchewan.

In the spectrum of low spending to high importance, the respondents clearly would like to see more offering of comparison merchandise in the City. For residents of the City of Fort Saskatchewan, an increase in the amount and/or quality of Full Service Restaurants and Grocery/ Pharmacy as well as compatible Clothes & Footwear could go a long way in retaining further spending

6.7 RESPONDENT CROSS- TABULATIONS OF SPENDING VERSUS IMPORTANCE

The process of cross-tabulating the former responses for ALL respondents and breaking them down into Age and Income sheds some refined analysis to the retail market and can also help to further identify the types of tenants that would find Fort Saskatchewan a strategic fit in their store network development strategy.

Spending & Importance By Respondent Age

Figures 6.18 & 6.19 illustrate the spending and importance ratings for respondents as broken down into the Respondent Age Cohort.

- 18 - 34 Years
- 35 - 54 Years
- 55 + Years

An examination of the spending and importance by age indicates some clear distinctions between the younger and older age cohorts in the City.

In terms of spending retained INSIDE Fort Saskatchewan, the Baby Boomers or those 55 years and older have the strongest spending profile across almost all categories, but most notably for categories such as Grocery, Home Improvement, Specialty Retail, Personal Services, Professional Financial Services and Full Service Restaurants. However, when looking at the importance of these same categories to increasing spending, the Baby Boomer segment does not place as high a value on these as do the emerging younger age cohorts.

The implications of this finding are two-fold. Firstly, while the Baby Boomers are a strong spending segment today, they are not the growth demographic in the Fort Saskatchewan Market, as evidenced by the average age at just over 35 years. Moreover, this pattern suggests that the Baby Boomers are generally happy and satisfied with the offering in the City of Fort Saskatchewan, while the emerging growth cohort are not as satisfied and are seeking new experiences and formats and are thus most likely to be the ones leaving Fort Saskatchewan for items like Clothing and Restaurants.

Secondly, and most importantly is the fact that the young family demographic, aged 18-34 years, with emerging incomes and young families have the greatest desire to see more offering in the community as a way of retaining their spending.

FIGURE 6.20

PERCENTAGE SPENDING IN FORT SASKATCHEWAN BY RESPONDENT HOUSEHOLD INCOME

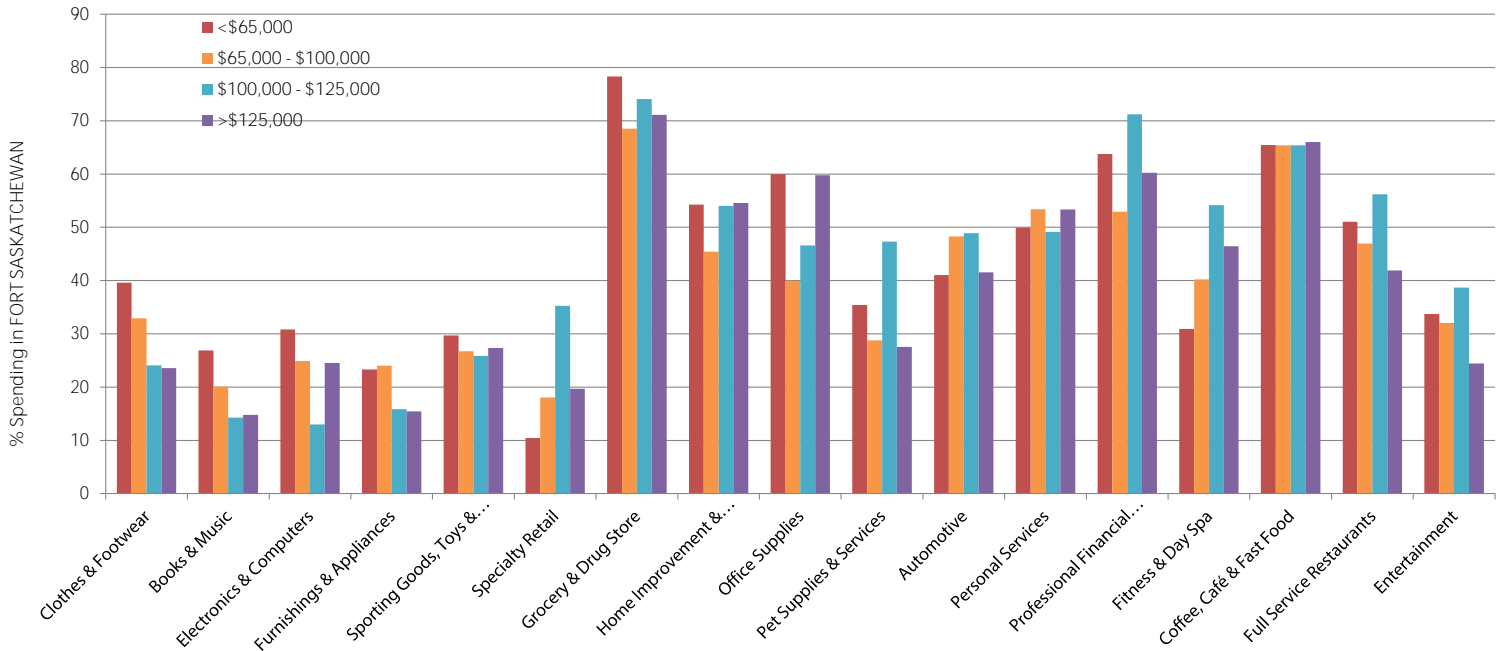
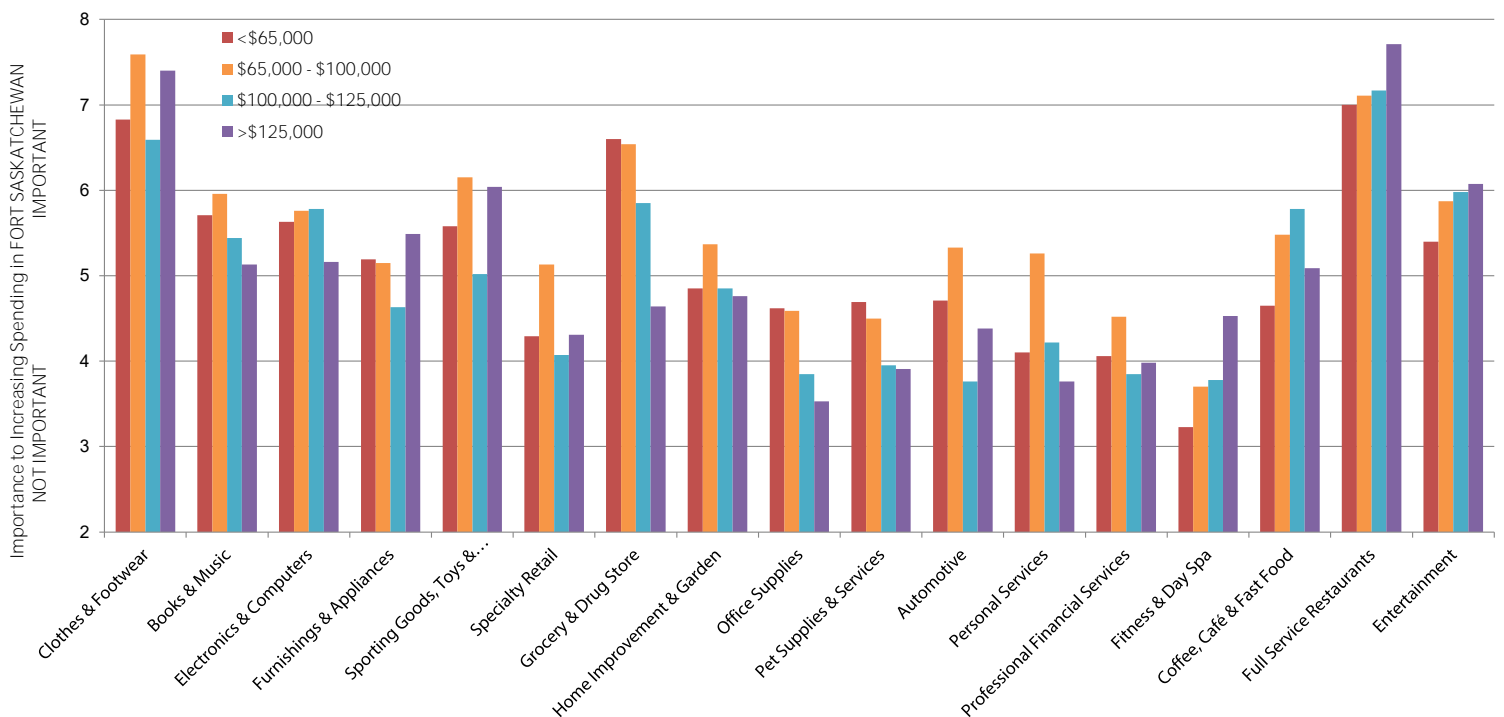


FIGURE 6.21

IMPORTANCE RATING TO INCREASE SPENDING BY RESPONDENT HOUSEHOLD INCOME



6

Moreover, it is this demographic age group that also has the largest representation in the trade area and as such has the most aggregate spending power for retailers to tap into.

Prospective retailers will realize the opportunity to cater to a market for which there are many more potential tenant opportunities. Specifically, those within the 18 - 34 year old age cohort are most likely to benefit from improvements in the retail offering in Fort Saskatchewan.

The 18 - 34 year old age cohort represents the dominant age bracket for spending on entertainment and equally has the highest importance on entertainment to increase their spending. Similar to the 18 - 34 year old market, the 35 - 54 year olds are also a strong spending demographic.

Retail spending has thus far catered more to the older demographic, but as the age profile illustrates, future emphasis should be geared toward the next generation of consumers who want to support the Fort Saskatchewan local businesses, but equally are prepared to leave Fort Saskatchewan for purchases.

Spending & Importance By Respondent Household Income

Figures 6.20 & 6.21 illustrate the spending and importance ratings for respondents as broken down into the Respondent Household Income.

- <\$65,000
- \$65,000 - \$100,000
- \$100,000 - \$125,000
- >\$125,000

An examination of the spending and importance by income also illustrates some slight variations in preferences, which in turn can be reflective of the types of targeted categories and tenants.

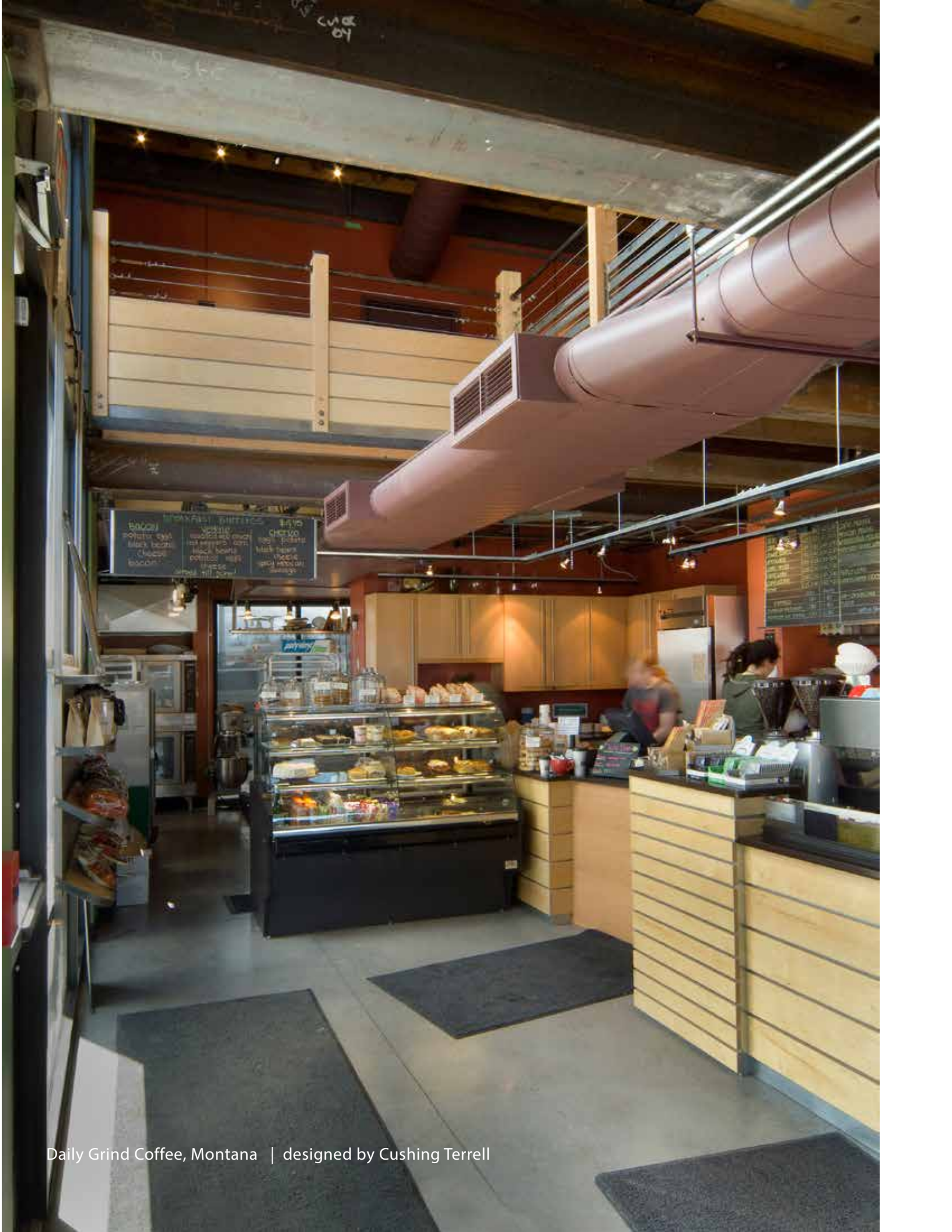
One would expect that the highest income segment (i.e. those earning more than \$100,000) would spend the most across the board on retail shopping, leisure and entertainment.

In fact, while that is true for some categories such as Clothing & Footwear, Home Furnishings & Appliances and Full Service Restaurants, the income bracket comprising \$65,000 to \$100,000 exhibits the strongest expenditure patterns in the City for the majority of categories and in particular Clothing & Footwear, Books & Music, Sporting Goods Toys & Hobbies, Automotive and Personal Services.

Figure 6.21 illustrates a pattern whereby Clothing and Footwear and Sporting Goods, Toys & Hobbies would be most desired by the \$65,000 - \$100,000 income bracket. Since these categories are most likely indicative of the family forming years, it would further suggest that the types of retailers would be more family oriented, casual and value priced (e.g. Old Navy).

The highest income segment (>\$125,000) have a very strong desire to have more Clothing and Restaurants in Fort Saskatchewan.

Grocery/Drug Store have a much higher importance for incomes below \$100,000 than for those above. This suggests that the market could support a traditional grocery like a Save On Foods or Real Canadian Superstore, although the latter would likely require an adjustment or relocation of the No Fills, which is a Loblaws format.



Daily Grind Coffee, Montana | designed by Cushing Terrell

6

6.8

SUMMARY & IMPLICATIONS

The Consumer Intercept Survey yielded findings that reinforce the more localized trade area for the City of Fort Saskatchewan.

The majority of respondents indicated a desire to have more Clothing & Footwear, Full Service Restaurants and Grocery. These particular categories were not only identified as specific categories, but the spending patterns and importance ratings of the respondents validated these sentiments.

Respondents identified a number of recognized restaurant and retailer brands. While Fort Saskatchewan is well positioned to attract many of the full and limited service restaurants identified, caution should be exercised as it relates to the list of comparison retailers. Many of the desired comparison retailers are mid to larger formats who are likely to be drawn to new developments at Emerald Hills and/or Manning Town Centre.

As such, Fort Saskatchewan should use the Consumer Survey trends that suggest targeting smaller more value-oriented retailers that could infill existing retail nodes, thus not necessitating another new retail node or nodes of any consequence.

The types of tenants sought by respondents combined with their spending patterns suggests that the most compatible locations capable of fulfilling retailer site location requirements will likely fall in the Central and South nodes and to a lesser degree the Downtown, although the redevelopment of the Fort Mall will provide a significant and viable option for tenants looking for newer space at potentially more affordable rates.

The Downtown area will continue to face external pressures resulting from continued growth on the fringe of the City. The Downtown is still recognized as a key node that can accommodate future tenant opportunities, particularly in the specialty retail, food & beverage categories and personal services categories.

The most significant appeal of Fort Saskatchewan's retail market is the strength and spending propensity of the high earning and fast growing young family segment in the 18 to 55 year age range.

A young, family-oriented market, with disposable incomes is a core prerequisite many retailers look for when selecting a market. Combined with Fort Saskatchewan's trade area and validation from the Consumer Intercept Survey, the Fort Saskatchewan market is well-positioned to attract specifically targeted categories and tenants.

A tall, blue-painted metal water tower stands against a cloudy sky. The top of the tower is a large, circular tank decorated with colorful drawings of children holding hands. The tower is supported by several vertical blue columns and a network of diagonal bracing.

35.6

CITY OF FORT SASKATCHEWAN AVERAGE AGE

34%

CITY OF FORT SASKATCHEWAN RESIDENTS WITH HOUSEHOLD INCOMES >\$125,000

38,700+

RETAIL TRADE AREA POPULATION (JULY 2016 ESTIMATE)

\$35 Million

TOTAL TRADE AREA RETAIL SPENDING ON FULL SERVICE RESTAURANTS

36

NUMBER OF QUICK SERVICE RESTAURANTS IN THE CITY OF FORT SASKATCHEWAN

3.4%

CITY OF FORT SASKATCHEWAN RETAIL VACANCY

7

CONCLUSION

7.1

FINDINGS & CONSIDERATIONS

The Retail Market & Gap Analysis for the City of Fort Saskatchewan entailed an extensive process that included the following methodological stages:

- *A detailed tabulation of the city's existing retail inventory further allocated into retail categories and sensitized by node and estimated retail sales performance;*
- *A Consumer Intercept Survey at various locations in Fort Saskatchewan to ascertain respondent origins, spending habits and preferences;*
- *A methodical and rationalized market area penetration resulting in a validated Retail Trade Area with population and detailed retail spending on a category-by-category basis;*
- *A quantification of the City's current supply versus demand in terms of supportable retail floorspace and resulting sales inflow and outflow estimates.*

The results of the Market Analysis yielded the following key findings and considerations for the City of Fort Saskatchewan's retail environment:

KEY FINDINGS:

- Fort Saskatchewan's demographic profile is comprised of a young, family demographic with an emerging affluence and corresponding discretionary income.

- Fort Saskatchewan's Retail Trade Area catchment serves a market of over 38,000 full time residents, which is forecast to increase by an additional 7,300 new residents over the next decade.
- The City of Fort Saskatchewan has an estimated part-time residential population of between 1,000 and 1,250 attributable to the Oil & Gas/Industrial Heartland.
- The City of Fort Saskatchewan currently has approximately 1.19 million sq. ft. of total retail space with a vacancy of only 3.4%.
- Current estimates for demand suggest that the City is marginally over-retailed, however this is attributable to specific categories such as Personal Services, Specialty Retail and Limited Service Restaurants.
- The majority of retail categories in the City are largely in balance with current demand estimates.
- Future growth forecasts suggest the City could conservatively accommodate an additional 220,000 sq. ft. of new retail space by 2026.
- Competitive influences from neighbouring areas to the south will continue, particularly as new nodes such as Emerald Hills and Manning Town Centre effectively restrict Fort Saskatchewan's retail trade area from penetrating south.

- Fort Saskatchewan’s retail inventory is well-positioned to provide community scale appeal for day-to-day necessities as well as casual essential comparison items such as everyday Apparel, Toys & Hobbies and Food & Beverage.
- Fort Saskatchewan has a net sales inflow of \$45 million (Y/E 2016 estimate), comprising predominantly convenience categories.
- Fort Saskatchewan does a very good job of retaining and attracting Convenience Spending from its Trade Area with a net inflow of \$58 million.
- Fort Saskatchewan garners strong inflow from Limited Service Restaurants (\$18.4 million).
- Fort Saskatchewan’s Total Trade Area penetration of the Full-Service Restaurant category could be stronger (currently at an estimated 52%).
- Fort Saskatchewan’s major leakage occurs in Automotive/RV Dealers (\$45.7million) Clothing & Footwear (\$15.1 million) and Home Furnishings (\$24.5 million).
- Consumer Survey Respondents would like to see more Full-Service Restaurants, Grocery and Clothing & Footwear at value to mid price points. An enhanced offering in these categories could lead to further retention of sales dollars in Fort Saskatchewan as well as more inflow from surrounding towns and counties.

Since 2014, when the original study was undertaken, Fort Saskatchewan has been resilient in maintaining moderate retail growth. The population of the Total Trade Area, driven by growth in the city of Fort Saskatchewan has continued.

The temporary workforce or “shadow population” has declined from previous estimates of 2,500 plus to approximately 1,250 or about half or less.

As with other markets affected by a drop in oil prices, consumer confidence and retail-specific spending has slowed, but this is expected to slowly rebound over the next few years.

A lower spending, within the Trade Area has also resulted in an estimated and corresponding decline in retail sales productivity for retailers in Fort Saskatchewan.

There has however been an introduction of new tenants in the market since 2014, with notable brands such as Canadian Brewhouse, Shoppers Drug Mart, Wendy’s, Montana’s and Kal Tire, as well as a second Shoppers Drug Mart.

The majority of new retail businesses in Fort Saskatchewan over the past two (2) years have however been local, which is a very positive sign of strength and resilience.

As the City grows, even in the face of weaker consumer confidence and spending, it is ever more important that the City recognize and prioritize retention and attraction for Downtown businesses.

7

Although residual demand continues to be in the negative (~ 420,000 sf), the recent economic challenges have shown a greater desire for convenience spending to be more localized. This has been manifest in less outflow overall than in 2014, particularly for convenience categories where Trade Area residents are staying closer to home.

Alternatively, bigger ticket items such as Auto and Recreational Vehicles as well as Comparison categories (or Department Store Type Merchandise DSTM) still exhibit outflow dollars from the community and this will likely be the case over the next 5-10 years.

Convenience and Food & Beverage categories will continue to be strong as will Specialty Retail, Auto Parts and Personal Services, or those categories for whom distance and time are a factor.

CONSIDERATIONS

- Market the City's offering of shops and services to the identified north, northwest and eastern parts of the trade area to attract and retain more of their spending.
 - Over the next decade, the City of Fort Saskatchewan should strive to increase its market share of retail spending from City Residents from an estimated 50% today to 60% by 2026. An increase of 10% could result in approximately upwards of \$65 million in additional sales retained in the city.
- Ensure that retail growth does not come at the expense of the Downtown.
 - Promote the infill of existing and developing retail nodes as a way of cultivating critical mass and critical mix.
 - Prioritize key target categories and tenants that can benefit from the sales inflow as well as curbing some outflow.
 - Avoid trying to compete with the major retail nodes at Emerald Hills and Manning Town Centre, but rather solidify the City's role as a strong service centre as the closest urban centre to Alberta's Industrial Heartland.

REPRESENTATIVE TARGET TENANTS



7

REPRESENTATIVE TARGET TENANTS





Photo credit: Cushing Terrell Architecture Inc. 2014

RETAIL

Market & Gap Analysis

City of Fort Saskatchewan

APPENDICES



Retail Business Name	Retail Node	Retail Cluster (DOWNTOWN, CENTRAL, SOUTH, DOWNTOWN, WEST)	General Retail Category	NAICS	Est. Area (SF)	Est. Sales Productivity Estimate Based on Building, Location, Tenant etc.	Est. Annual Sales Based on Building, Location, Tenant etc.
Century 21 Realty	101st/Hwy 15	CENTRAL	Personal Services	531212	1,165	\$300	\$349,605
Dollarama	101st/Hwy 15	CENTRAL	Specialty Retail	45299	10,123	\$215	\$2,176,370
Fountain Tire	101st/Hwy 15	CENTRAL	Auto Parts & Accessories	44132	13,411	\$350	\$4,693,955
Gas Bar Convenience	101st/Hwy 15	CENTRAL	Grocery & Specialty Foods	44719	582	\$550	\$320,238
Jiffy Lube	101st/Hwy 15	CENTRAL	Auto Parts & Accessories	811199	1,375	\$350	\$481,355
KFC Taco Bell	101st/Hwy 15	CENTRAL	Limited Service F&B	722512	1,922	\$375	\$720,694
No Frills	101st/Hwy 15	CENTRAL	Grocery & Specialty Foods	44511	34,383	\$550	\$18,910,375
Pizza Hut	101st/Hwy 15	CENTRAL	Limited Service F&B	722512	2,474	\$350	\$865,725
Quiznos Sub	101st/Hwy 15	CENTRAL	Limited Service F&B	722512	1,165	\$500	\$582,675
Real Canadian Liquor Store	101st/Hwy 15	CENTRAL	Alcohol & Tobacco	44531	5,485	\$594	\$3,256,748
Tim Hortons	101st/Hwy 15	CENTRAL	Limited Service F&B	722512	2,320	\$625	\$1,449,781
Winners Way Source for Sports	101st/Hwy 15	CENTRAL	Sporting Goods & Outdoor Recreation	45111	9,976	\$281	\$2,805,638
Z Chiropractic	101st/Hwy 15	CENTRAL	Personal Services	621310	1,165	\$300	\$349,605
Bank of Montreal	Cornerstone	CENTRAL	Personal Services	522111	5,987	\$300	\$1,795,965
Boston Pizza	Cornerstone	CENTRAL	Full Service F&B	722511	6,799	\$750	\$5,099,363
Canadian Tire	Cornerstone	CENTRAL	Auto Parts & Accessories	45299	15,000	\$350	\$5,250,000
Canadian Tire	Cornerstone	CENTRAL	Books & Multi-Media		0	\$300	\$0
Canadian Tire	Cornerstone	CENTRAL	Clothing & Apparel		1,000	\$250	\$250,000
Canadian Tire	Cornerstone	CENTRAL	Footwear		500	\$275	\$137,500
Canadian Tire	Cornerstone	CENTRAL	Grocery & Specialty Foods		500	\$550	\$275,000
Canadian Tire	Cornerstone	CENTRAL	Health & Beauty		0	\$425	\$0
Canadian Tire	Cornerstone	CENTRAL	Home Electronics & Appliances		2,000	\$625	\$1,250,000
Canadian Tire	Cornerstone	CENTRAL	Home Furnishings & Accessories		5,000	\$235	\$1,175,000
Canadian Tire	Cornerstone	CENTRAL	Home Improvement & Gardening		15,000	\$275	\$4,125,000
Canadian Tire	Cornerstone	CENTRAL	Jewelry & Accessories		0	\$625	\$0
Canadian Tire	Cornerstone	CENTRAL	Limited Service F&B		0	\$500	\$0
Canadian Tire	Cornerstone	CENTRAL	Personal Services		0	\$300	\$0
Canadian Tire	Cornerstone	CENTRAL	Pharmacy		0	\$600	\$0
Canadian Tire	Cornerstone	CENTRAL	Specialty Retail		5,000	\$215	\$1,075,000
Canadian Tire	Cornerstone	CENTRAL	Sporting Goods & Outdoor Recreation		8,000	\$225	\$1,800,000
Canadian Tire	Cornerstone	CENTRAL	Toys & Hobbies		8,000	\$225	\$1,800,000
Cornerstone Dental Centre	Cornerstone		Occupied Traditional Retail	621210		\$0	\$0
Edo Grill Sushi	Cornerstone	CENTRAL	Limited Service F&B	722511	1,514	\$625	\$946,156
Extreme Pita	Cornerstone	CENTRAL	Limited Service F&B	722512	1,055	\$625	\$659,281
Fatburger	Cornerstone	CENTRAL	Full Service F&B	722512	1,724	\$350	\$603,330
FYI doctors	Cornerstone	CENTRAL	Personal Services	621320	3,169	\$300	\$950,640
Get Real Natural Health Food	Cornerstone	CENTRAL	Grocery & Specialty Foods	44529	1,024	\$413	\$422,503
Lammle's Western Wear	Cornerstone	CENTRAL	Clothing & Apparel	44814	4,365	\$250	\$1,091,188
Liquor Barn	Cornerstone	CENTRAL	Alcohol & Tobacco	44531	2,723	\$594	\$1,616,514
M & M Meat Shop	Cornerstone	CENTRAL	Grocery & Specialty Foods	44521	1,024	\$688	\$704,172
Mark's	Cornerstone	CENTRAL	Clothing & Apparel	44814	5,570	\$313	\$1,740,641
Papa John's Pizza	Cornerstone	CENTRAL	Limited Service F&B	722512	1,298	\$500	\$648,975
Payless Shoe Source	Cornerstone	CENTRAL	Footwear	44821	1,629	\$275	\$448,099
PetValu	Cornerstone	CENTRAL	Specialty Retail	453910	2,717	\$215	\$584,069
Reitman's	Cornerstone	CENTRAL	Clothing & Apparel	44812	7,818	\$250	\$1,954,575
Safeway	Cornerstone	CENTRAL	Grocery & Specialty Foods	44511	42,660	\$688	\$29,328,613
Staples	Cornerstone	CENTRAL	Specialty Retail	45321	12,862	\$215	\$2,765,373
Subway	Cornerstone	CENTRAL	Limited Service F&B	722512	1,024	\$625	\$640,156
Supercuts	Cornerstone	CENTRAL	Health & Beauty	812116	1,024	\$531	\$544,133
Telus	Cornerstone	CENTRAL	Specialty Retail	532210	1,024	\$269	\$275,267
The Brick	Cornerstone	CENTRAL	Home Furnishings & Accessories	44211	10,966	\$235	\$2,576,975
The Brick Mattresses	Cornerstone	CENTRAL	Home Furnishings & Accessories	44211	2,791	\$235	\$655,979
The Source	Cornerstone	CENTRAL	Home Electronics & Appliances	44314	3,455	\$625	\$2,159,531
VO's Nails	Cornerstone	CENTRAL	Health & Beauty	812115	1,024	\$425	\$435,306
WalMart	Cornerstone	CENTRAL	Auto Parts & Accessories	45299	8,000	\$350	\$2,800,000
WalMart	Cornerstone	CENTRAL	Books & Multi-Media		1,000	\$300	\$300,000
WalMart	Cornerstone	CENTRAL	Clothing & Apparel		40,000	\$250	\$10,000,000
WalMart	Cornerstone	CENTRAL	Footwear		2,000	\$275	\$550,000
WalMart	Cornerstone	CENTRAL	Grocery & Specialty Foods		40,000	\$550	\$22,000,000
WalMart	Cornerstone	CENTRAL	Health & Beauty		4,000	\$425	\$1,700,000
WalMart	Cornerstone	CENTRAL	Home Electronics & Appliances		10,000	\$625	\$6,250,000
WalMart	Cornerstone	CENTRAL	Home Furnishings & Accessories		10,000	\$235	\$2,350,000
WalMart	Cornerstone	CENTRAL	Home Improvement & Gardening		8,000	\$275	\$2,200,000
WalMart	Cornerstone	CENTRAL	Jewelry & Accessories		2,000	\$625	\$1,250,000
WalMart	Cornerstone	CENTRAL	Limited Service F&B		2,000	\$500	\$1,000,000
WalMart	Cornerstone	CENTRAL	Personal Services		1,000	\$300	\$300,000
WalMart	Cornerstone	CENTRAL	Pharmacy		4,000	\$600	\$2,400,000
WalMart	Cornerstone	CENTRAL	Specialty Retail		10,000	\$215	\$2,150,000
WalMart	Cornerstone	CENTRAL	Sporting Goods & Outdoor Recreation		4,000	\$225	\$900,000
WalMart	Cornerstone	CENTRAL	Toys & Hobbies		4,000	\$225	\$900,000
Warehouse One	Cornerstone	CENTRAL	Clothing & Apparel	448140	2,799	\$250	\$699,763
Your Dollar Store With More	Cornerstone	CENTRAL	Specialty Retail	45299	3,580	\$215	\$769,743

A

APPENDIX | RETAIL INVENTORY

Shaded area reflects changes in retail inventory since last study was completed in December 2014/January 2015

Retail Business Name	Retail Node	Retail Cluster (DOWNTOWN, CENTRAL, SOUTH, DOWNTOWN, WEST)	General Retail Category	NAICS	Est. Area (SF)	Est. Sales Productivity Estimate Based on Building, Location, Tenant etc.	Est. Annual Sales Based on Building, Location, Tenant etc.
ATCO Gas	Eastgate		Occupied Traditional Retail			\$0	\$0
Budget Rental Car	Eastgate	CENTRAL	Auto/RV/Motorsports Dealership	532111	2,107	\$319	\$671,654
Commercial Solutions, Inc	Eastgate		Occupied Traditional Retail			\$0	\$0
Crystal Chrysler Dodge Ram	Eastgate	CENTRAL	Auto/RV/Motorsports Dealership	44111	13,729	\$425	\$5,834,910
Dance at Brijets	Eastgate	CENTRAL	Entertainment & Leisure	611610	4,618	\$150	\$692,708
Fort Technology Group	Eastgate		Occupied Traditional Retail			\$0	\$0
Home Hardware Building Centre	Eastgate	CENTRAL	Home Improvement & Gardening	44411	17,175	\$275	\$4,723,153
Modo Mio Italian Restaurant	Eastgate	CENTRAL	Full Service F&B	722511	1,937	\$263	\$508,502
PartSource Auto Parts	Eastgate	CENTRAL	Auto Parts & Accessories	44131	3,835	\$350	\$1,342,320
Red-E Carpets	Eastgate	CENTRAL	Home Furnishings & Accessories	442210	2,176	\$176	\$383,520
Sears	Eastgate	CENTRAL	Home Furnishings & Accessories	45211	6,142	\$176	\$1,082,545
Unique Financial Services	Eastgate	CENTRAL	Personal Services	523930	2,054	\$300	\$616,080
Vacant	Eastgate	CENTRAL	VACANT		1,867	\$0	\$0
A & W	South Fort	CENTRAL	Limited Service F&B	722512	2,162	\$625	\$1,351,500
Fas Gas Mart	South Fort	CENTRAL	Grocery & Specialty Foods	447110	500	\$413	\$206,250
Humpty's Family Restaurant	South Fort	CENTRAL	Full Service F&B	722511	4,127	\$263	\$1,083,272
Maxx Physio Therapy	South Fort		Occupied Traditional Retail			\$0	\$0
McDonalds	South Fort	CENTRAL	Limited Service F&B	722512	5,432	\$625	\$3,394,688
Money Mart	South Fort	CENTRAL	Personal Services	522291	1,864	\$225	\$419,411
Roustabout's Restaurant	South Fort	CENTRAL	Full Service F&B	722511	5,562	\$263	\$1,460,130
South Fort Chevrolet	South Fort	CENTRAL	Auto/RV/Motorsports Dealership	44111	15,406	\$425	\$6,547,656
Spirits on 101 Liquor	South Fort	CENTRAL	Alcohol & Tobacco	44531	1,960	\$356	\$698,286
Subway	South Fort	CENTRAL	Limited Service F&B	722512	1,153	\$500	\$576,300
Yakimet's Pharmacy	South Fort	CENTRAL	Pharmacy	44611	3,047	\$450	\$1,371,263
Cann/Amm Occupational Therapy	Southpointe	CENTRAL	Personal Services	621340	749	\$225	\$168,491
Co-op Gas & Convenience Store	Southpointe	CENTRAL	Grocery & Specialty Foods		2,400	\$413	\$990,000
Domino's Pizza	Southpointe	CENTRAL	Limited Service F&B	722512	1,079	\$375	\$404,494
DynaLIFE Laboratory Services	Southpointe	CENTRAL	Personal Services	621510	3,483	\$225	\$783,743
Fort Physical Therapy	Southpointe		Occupied Traditional Retail			\$0	\$0
H & R Block	Southpointe	CENTRAL	Personal Services	541212	1,200	\$225	\$270,000
Home Depot	Southpointe	CENTRAL	Home Improvement & Gardening	44411	75,504	\$344	\$25,954,431
Kal Tire	Southpointe	CENTRAL	Auto Parts & Accessories		7,400	\$350	\$2,590,000
Medical Clinic	Southpointe	CENTRAL	Personal Services	621499	3,614	\$300	\$1,084,260
Medical Imaging Consultants	Southpointe	CENTRAL	Personal Services	621510	5,876	\$300	\$1,762,815
Mucho Burrito	Southpointe	CENTRAL	Limited Service F&B	722512	1,796	\$625	\$1,122,531
Opa Greek	Southpointe	CENTRAL	Limited Service F&B	722512	1,976	\$625	\$1,235,156
Original Joe's	Southpointe	CENTRAL	Full Service F&B	722511	2,041	\$438	\$892,872
Q Nails	Southpointe	CENTRAL	Health & Beauty	812115	1,119	\$425	\$475,766
Rogers	Southpointe	CENTRAL	Personal Services	532210	1,080	\$375	\$405,131
Shoppers Drug Mart	Southpointe	CENTRAL	Pharmacy	44611	16,448	\$750	\$12,335,625
Solo Liquor	Southpointe	CENTRAL	Alcohol & Tobacco	44531	962	\$594	\$571,306
South Fort Dental	Southpointe		Occupied Traditional Retail			\$0	\$0
Starbucks Coffee	Southpointe	CENTRAL	Limited Service F&B	722512	1,779	\$625	\$1,111,906
Wok Box	Southpointe	CENTRAL	Limited Service F&B	722512	1,796	\$500	\$898,025

Retail Business Name	Retail Node	Retail Cluster (DOWNTOWN, CENTRAL, SOUTH, DOWNTOWN, WEST)	General Retail Category	NAICS	Est. Area (SF)	Est. Sales Productivity Estimate Based on Building, Location, Tenant etc.	Est. Annual Sales Based on Building, Location, Tenant etc.
99th Avenue Liquor Store	Station Square	DOWNTOWN	Alcohol & Tobacco	44531	1,837	\$475	\$872,504
ATB Financial	Station Square	DOWNTOWN	Personal Services	522111	5,820	\$375	\$2,182,481
Co-op	Station Square	DOWNTOWN	Grocery & Specialty Foods	44511	40,480	\$550	\$22,263,753
Dairy Queen	Station Square	DOWNTOWN	Limited Service F&B	722512	2,111	\$500	\$1,055,275
Faces Spa and Salon	Station Square	DOWNTOWN	Health & Beauty	812115	2,714	\$319	\$865,103
Fort Cinemas	Station Square	DOWNTOWN	Entertainment & Leisure	51213	7,818	\$150	\$1,172,745
Fort Saskatchewan Dental Clinic	Station Square		Occupied Traditional Retail			\$0	\$0
Givens LLP	Station Square		Occupied Traditional Retail			\$0	\$0
Hot & Fresh Pizza	Station Square	DOWNTOWN	Limited Service F&B	722511	2,867	\$375	\$1,075,144
K Lee Boutique	Station Square	DOWNTOWN	Health & Beauty	812115	1,498	\$319	\$477,392
Positivity Preschool	Station Square	DOWNTOWN	Personal Services	624410	2,343	\$225	\$527,085
Robin Hood Learning Centre	Station Square	DOWNTOWN	Personal Services	624410	2,660	\$300	\$797,895
Snap Fitness	Station Square	DOWNTOWN	Entertainment & Leisure	71394	8,519	\$250	\$2,129,675
TD Canada Trust	Station Square	DOWNTOWN	Personal Services	522111	4,848	\$300	\$1,454,265
Vacant Restaurant	Station Square	DOWNTOWN	VACANT	722511	1,275	\$0	\$0
7-Eleven	Downtown	DOWNTOWN	Grocery & Specialty Foods	445120	1,754	\$550	\$964,920
A Touch of Wellness	Downtown	DOWNTOWN	Specialty Retail	44529	346	\$161	\$55,784
Advance Driving School	Downtown		Occupied Traditional Retail			\$0	\$0
Alberta Government	Downtown		Occupied Traditional Retail			\$0	\$0
Ann's Day Care	Downtown	DOWNTOWN	Personal Services	624410	3,245	\$225	\$730,193
Apropos Therapy Centre	Downtown		Occupied Traditional Retail			\$0	\$0
A-Win Insurance	Downtown	DOWNTOWN	Personal Services	524210	1,040	\$300	\$312,120
Barber Shop	Downtown	DOWNTOWN	Health & Beauty	812114	945	\$319	\$301,283
Blondes Brunettes & Redheads Salon	Downtown	DOWNTOWN	Health & Beauty	812115	2,169	\$319	\$691,433
CA Insurance Plans West	Downtown	DOWNTOWN	Personal Services	524210	1,114	\$300	\$334,050
Canuck Plumbing & Heating	Downtown	DOWNTOWN	Home Improvement & Gardening	416120	3,872	\$625	\$2,419,844
Caprice Lounge	Downtown	DOWNTOWN	Full Service F&B	72241	2,575	\$338	\$868,944
Career & Employment Resource Centre	Downtown		Occupied Traditional Retail			\$0	\$0
Chinese Restaurant (Soon to be relocating)	Downtown	DOWNTOWN	Full Service F&B	722511	2,603	\$263	\$683,209
Chiropractic Clinic Laser Therapy	Downtown		Occupied Traditional Retail			\$0	\$0
Church Tattoos	Downtown	DOWNTOWN	Personal Services	621310	1,300	\$225	\$292,500
CIBC	Downtown	DOWNTOWN	Personal Services	522111	4,474	\$300	\$1,342,065
Cinfully Pure Water	Downtown	DOWNTOWN	Specialty Retail	44529	813	\$161	\$131,169
CnH Appliances	Downtown	DOWNTOWN	Home Electronics & Appliances	44314	2,962	\$469	\$1,388,555
Cover to Cover Books	Downtown	DOWNTOWN	Books & Multi-Media	451310	1,403	\$225	\$315,563
Crystal Glass	Downtown	DOWNTOWN	Auto Parts & Accessories	441310	2,848	\$263	\$747,469
Daddeos Smoke Shop	Downtown	DOWNTOWN	Alcohol & Tobacco	413310	759	\$356	\$270,412
Daisy a Day	Downtown	DOWNTOWN	Specialty Retail	453110	949	\$215	\$204,132
Dance Moves	Downtown	DOWNTOWN	Entertainment & Leisure	611610	3,969	\$150	\$595,298
Dance Studio	Downtown	DOWNTOWN	Entertainment & Leisure	611610	890	\$150	\$133,493
Day Care	Downtown	DOWNTOWN	Personal Services	624410	3,116	\$225	\$701,123
Dental Clinic	Downtown		Occupied Traditional Retail			\$0	\$0
Dental Clinic	Downtown		Occupied Traditional Retail			\$0	\$0
Denture Care Centre	Downtown		Occupied Traditional Retail			\$0	\$0
Depot/Chamber of Commerce	Downtown		Occupied Traditional Retail			\$0	\$0
Drayden Insurance	Downtown	DOWNTOWN	Personal Services	524210	2,684	\$300	\$805,290
Driving Force Driver Training	Downtown		Occupied Traditional Retail			\$0	\$0
Edward Jones Investments	Downtown	DOWNTOWN	Personal Services	522111	1,939	\$225	\$436,241
Enhance It Embroidery	Downtown	DOWNTOWN	Specialty Retail	313310	1,156	\$161	\$186,405
Esso C Store - Tim Hortons	Downtown	DOWNTOWN	Grocery & Specialty Foods	44711	1,265	\$550	\$695,640
European Touch Massage & Wellness	Downtown	DOWNTOWN	Personal Services	45322	1,336	\$225	\$300,645
Eye Masters/T's Nails	Downtown	DOWNTOWN	Personal Services	812115	703	\$225	\$158,164
Fake and Bake Tanning Salon	Downtown	DOWNTOWN	Personal Services	812115	972	\$225	\$218,599
Flo's Beauty Salon	Downtown	DOWNTOWN	Health & Beauty	812115	1,093	\$319	\$348,426
Fort Bottle Depot	Downtown	DOWNTOWN	Specialty Retail	418190	4,367	\$161	\$704,227
Fort Chiropractic Centre	Downtown		Occupied Traditional Retail			\$0	\$0
Fort Cleaners and Coin Laundry	Downtown	DOWNTOWN	Personal Services	812310	2,569	\$225	\$577,958
Fort Family Restaurant	Downtown	DOWNTOWN	Full Service F&B		1,271	\$350	\$444,850
Fort Gasland	Downtown	DOWNTOWN	Auto/RV/Motorsports Dealership	441310	2,028	\$319	\$646,457
Fort Lanes	Downtown	DOWNTOWN	Entertainment & Leisure	71395	6,805	\$150	\$1,020,765
Fort Saskatchewan Newspaper	Downtown		Occupied Traditional Retail			\$0	\$0
Fort Saskatchewan Veterinary Clinic	Downtown		Occupied Traditional Retail			\$0	\$0
Fort Shoe Repair	Downtown	DOWNTOWN	Footwear	811430	611	\$206	\$126,050

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Retail Business Name	Retail Node	Retail Cluster (DOWNTOWN, CENTRAL, SOUTH, DOWNTOWN, WEST)	General Retail Category	NAICS	Est. Area (SF)	Est. Sales Productivity Estimate Based on Building, Location, Tenant etc.	Est. Annual Sales Based on Building, Location, Tenant etc.
Giant Tiger	Downtown	DOWNTOWN	Clothing & Apparel	45299	17,375	\$188	\$3,257,784
Glenns Music Store	Downtown	DOWNTOWN	Specialty Retail	45114	476	\$225	\$107,100
Gold and Diamond Boutique	Downtown	DOWNTOWN	Jewelry & Accessories	44831	1,172	\$625	\$732,594
Gott the Gift Music Studio	Downtown	DOWNTOWN	Specialty Retail	45114	1,940	\$161	\$312,777
Grammie's Coffee Shop	Downtown	DOWNTOWN	Limited Service F&B	722512	1,182	\$375	\$443,381
Greenland Day Care	Downtown	DOWNTOWN	Personal Services	624410	3,465	\$225	\$779,535
Greenwood Medical Clinic	Downtown		Occupied Traditional Retail			\$0	\$0
Growers Direct Flowers	Downtown	DOWNTOWN	Specialty Retail	45311	1,906	\$161	\$307,294
Hair Do Salon	Downtown	DOWNTOWN	Health & Beauty	812115	677	\$319	\$215,666
Hair Junky's	Downtown	DOWNTOWN	Health & Beauty	812115	724	\$319	\$230,839
Hanabi	Downtown	DOWNTOWN	Full Service F&B		2,400	\$263	\$630,000
Home Team Advantage Promo Printing	Downtown	DOWNTOWN	Specialty Retail	323113	1,873	\$215	\$402,598
Husky Food Store	Downtown	DOWNTOWN	Grocery & Specialty Foods	44711	3,628	\$413	\$1,496,468
Imperial Appliances	Downtown	DOWNTOWN	Home Electronics & Appliances	44314	1,327	\$469	\$621,961
Investment Planning Counsel Corporation	Downtown		Occupied Traditional Retail			\$0	\$0
Jacque Fenske MLA	Downtown		Occupied Traditional Retail			\$0	\$0
Kebab	Downtown	DOWNTOWN	Limited Service F&B		1,479	\$375	\$554,625
Kelly & Thomas Accountants	Downtown	DOWNTOWN	Personal Services	541212	3,118	\$225	\$701,505
Kjenner Financial Services	Downtown	DOWNTOWN	Personal Services	541212	986	\$225	\$221,850
Kountry Knits	Downtown	DOWNTOWN	Specialty Retail	313310	1,765	\$161	\$284,542
La Perla Hair Studio	Downtown	DOWNTOWN	Health & Beauty	812115	1,163	\$319	\$370,643
Legendary Barber Shop	Downtown	DOWNTOWN	Health & Beauty		400	\$319	\$127,500
Liberty Tax	Downtown	DOWNTOWN	Personal Services	541212	2,015	\$225	\$453,263
Liquor 4 You	Downtown	DOWNTOWN	Alcohol & Tobacco	44531	1,559	\$475	\$740,478
Little Rascals Trading Post	Downtown	DOWNTOWN	Toys & Hobbies	451120	1,238	\$169	\$208,988
Madison's Dog Grooming	Downtown	DOWNTOWN	Personal Services	812910	654	\$225	\$147,071
Mike's Hair	Downtown	DOWNTOWN	Health & Beauty	812116	630	\$319	\$200,765
Millers Ice Cream	Downtown	DOWNTOWN	Limited Service F&B	722512	224	\$375	\$84,150
Morgan's Printing	Downtown	DOWNTOWN	Specialty Retail	313113	2,286	\$161	\$368,561
Napa Auto Parts	Downtown	DOWNTOWN	Auto Parts & Accessories	44131	5,274	\$350	\$1,845,988
New 2 You	Downtown	DOWNTOWN	Clothing & Apparel		1,600	\$188	\$300,000
Our Kitchen Table Restaurant	Downtown	DOWNTOWN	Full Service F&B	722511	2,783	\$263	\$730,511
Parent Link Centre	Downtown		Occupied Traditional Retail			\$0	\$0
Paul Hotke CPA	Downtown	DOWNTOWN	Personal Services	541212	1,390	\$225	\$312,694
Pawn Shop	Downtown	DOWNTOWN	Specialty Retail	522299	1,219	\$161	\$196,548
Perry's Pizza and Pasta	Downtown	DOWNTOWN	Limited Service F&B	722512	911	\$375	\$341,700
Pinder Chiropractic	Downtown		Occupied Traditional Retail			\$0	\$0
Pot's Restaurant	Downtown	DOWNTOWN	Full Service F&B	722511	2,997	\$263	\$786,739
Precision Hearing	Downtown	DOWNTOWN	Personal Services	621499	903	\$225	\$203,108
Ravenous FX	Downtown	DOWNTOWN	Specialty Retail	45310	433	\$161	\$69,765
RBC	Downtown	DOWNTOWN	Personal Services	522111	5,901	\$300	\$1,770,210
Realty Executives	Downtown	DOWNTOWN	Personal Services	531212	1,482	\$225	\$333,540
Remax Real Estate	Downtown	DOWNTOWN	Personal Services		1,800	\$225	\$405,000
Richard's Donair and Sub	Downtown	DOWNTOWN	Limited Service F&B	722512	1,170	\$375	\$438,919
Roadready Auto Service	Downtown	DOWNTOWN	Auto Parts & Accessories	441310	2,071	\$263	\$543,756
Roland's Jewelry	Downtown	DOWNTOWN	Jewelry & Accessories	44831	2,847	\$781	\$2,223,945
Scotiabank	Downtown	DOWNTOWN	Personal Services	522111	4,706	\$300	\$1,411,680
Serenity Funeral Home	Downtown		Occupied Traditional Retail			\$0	\$0
Servus	Downtown	DOWNTOWN	Personal Services	522111	3,543	\$300	\$1,062,840
Sharper Image	Downtown	DOWNTOWN	Specialty Retail	812116	1,176	\$161	\$189,557
Silky Nails	Downtown	DOWNTOWN	Health & Beauty	812115	955	\$319	\$304,263
Simply Stunning Hair & Makeup	Downtown	DOWNTOWN	Health & Beauty		1,900	\$319	\$605,625
Skate and Snowboard Shop	Downtown	DOWNTOWN	Sporting Goods & Outdoor Recreation	451112	805	\$225	\$181,114
Smilemakers Dental Centre	Downtown		Occupied Traditional Retail			\$0	\$0
Smith Insurance/NE Capital Industrial Assc (Up)	Downtown	DOWNTOWN	Personal Services	524299	3,222	\$225	\$725,029
Soultitude Salon & Spa	Downtown	DOWNTOWN	Health & Beauty	812115	1,292	\$319	\$411,825
Spotlight Gallery	Downtown	DOWNTOWN	Specialty Retail	453920	1,494	\$161	\$240,956
Strathcona Denture Clinic	Downtown		Occupied Traditional Retail			\$0	\$0
Street Kings	Downtown	DOWNTOWN	Clothing & Apparel	448199	964	\$188	\$180,731
Sub Joint	Downtown	DOWNTOWN	Limited Service F&B	722512	697	\$375	\$261,375
Sunrae Massage & Wellness	Downtown	DOWNTOWN	Personal Services		1,000	\$225	\$225,000
Switzer Financial Corporation	Downtown	DOWNTOWN	Personal Services		2,300	\$225	\$517,500

Retail Business Name	Retail Node	Retail Cluster (DOWNTOWN, CENTRAL, SOUTH, DOWNTOWN, WEST	General Retail Category	NAICS	Est. Area (SF)	Est. Sales Productivity Estimate Based on Building, Location, Tenant etc.	Est. Annual Sales Based on Building, Location, Tenant etc.
Tattoo Studio	Downtown	DOWNTOWN	Personal Services	812190	910	\$225	\$204,638
The Art of Nails	Downtown	DOWNTOWN	Health & Beauty	812115	717	\$319	\$228,671
The Atlantic Kitchen Restaurant	Downtown	DOWNTOWN	Full Service F&B	722511	1,873	\$263	\$491,768
The Bear's Den	Downtown	DOWNTOWN	Full Service F&B	72241	6,925	\$350	\$2,423,733
The Blu Poppie	Downtown	DOWNTOWN	Specialty Retail	453999	629	\$161	\$101,426
The Cash Store	Downtown	DOWNTOWN	Personal Services	522291	459	\$225	\$103,275
The Cooperators M. Friel Agencies	Downtown	DOWNTOWN	Personal Services	541212	2,712	\$225	\$610,279
The Downtown Diner	Downtown	DOWNTOWN	Full Service F&B	722511	1,084	\$438	\$474,141
The Fort Barber Shop	Downtown	DOWNTOWN	Health & Beauty	812114	692	\$319	\$220,543
The Fort Gaming and Collectibles	Downtown	DOWNTOWN	Specialty Retail		1,400	\$161	\$225,750
The Hair Corner	Downtown	DOWNTOWN	Health & Beauty	812116	1,197	\$319	\$381,480
This and That Photography	Downtown	DOWNTOWN	Specialty Retail	541920	750	\$161	\$120,938
Time For Taxes	Downtown	DOWNTOWN	Personal Services	541212	831	\$225	\$187,043
Tire and Auto Repair	Downtown	DOWNTOWN	Auto Parts & Accessories	44132	5,073	\$263	\$1,331,610
Toadstool Music Studio	Downtown	DOWNTOWN	Personal Services	611610	500	\$225	\$112,500
Top Notch Games	Downtown	DOWNTOWN	Toys & Hobbies	451120	698	\$169	\$117,762
(CLOSED) Treasures Past and Present	Downtown	DOWNTOWN	VACANT		728	\$164	\$118,963
Twice But Nice Thrift Store	Downtown	DOWNTOWN	Specialty Retail	45299	4,140	\$161	\$667,494
Unknown	Downtown		Occupied Traditional Retail			\$0	\$0
Upscale Resale Consignment	Downtown	DOWNTOWN	Specialty Retail	44819	1,205	\$161	\$194,355
Vacant	Downtown	DOWNTOWN	VACANT		972	\$0	\$0
Vacant	Downtown	DOWNTOWN	VACANT		637	\$0	\$0
Vacant	Downtown	DOWNTOWN	VACANT		600	\$0	\$0
Vacant	Downtown	DOWNTOWN	VACANT		420	\$0	\$0
Vacant	Downtown	DOWNTOWN	VACANT		10,861	\$0	\$0
Vacant	Downtown	DOWNTOWN	VACANT		2,586	\$0	\$0
Vacant	Downtown	DOWNTOWN	VACANT		1,713	\$0	\$0
Vacant Old Garage	Downtown	DOWNTOWN	VACANT		861	\$0	\$0
Vacant Restaurant	Downtown	DOWNTOWN	VACANT		5,492	\$0	\$0
Vacant Restaurant	Downtown	DOWNTOWN	VACANT		2,554	\$0	\$0
Vacant (Telus relocated)	Downtown	DOWNTOWN	VACANT		2,287	\$0	\$0
Vivid Vision Optometrist	Downtown	DOWNTOWN	Personal Services		1,249	\$225	\$280,946
VN Express Restaurant	Downtown	DOWNTOWN	Full Service F&B	722511	1,067	\$263	\$280,022
Wash Land Coin Laundry	Downtown	DOWNTOWN	Personal Services	812310	983	\$225	\$221,276
Wild Rose Animal Clinic	Downtown	DOWNTOWN	Personal Services	541940	904	\$225	\$203,490
Winning Wines Plus	Downtown	DOWNTOWN	Alcohol & Tobacco	44531	386	\$356	\$137,477
Ace Liquor	Downtown - Fort Mall	DOWNTOWN	Alcohol & Tobacco		4,885	\$356	\$1,740,281
Accounting Rescue (before redevelopment)	Downtown - Fort Mall	DOWNTOWN	Personal Services	541212	250	\$225	\$56,250
Benjamin Moore Paints	Downtown - Fort Mall	DOWNTOWN	Home Improvement & Gardening		1,368	\$161	\$220,590
City Law Offices (before redevelopment)	Downtown - Fort Mall	DOWNTOWN	Personal Services	541110	1,000	\$225	\$225,000
Fort Gymnastics (before redevelopment)	Downtown - Fort Mall	DOWNTOWN	Entertainment & Leisure	611620	7,500	\$150	\$1,125,000
G & J Variety Store (before redevelopment)	Downtown - Fort Mall	DOWNTOWN	Specialty Retail	45299	750	\$161	\$120,938
Judy's Safety Co (before redevelopment)	Downtown - Fort Mall		Occupied Traditional Retail			\$0	\$0
Jump FEC	Downtown - Fort Mall	DOWNTOWN	Entertainment & Leisure		13,000	\$150	\$1,950,000
Koa Hot Yoga	Downtown - Fort Mall	DOWNTOWN	Personal Services		3,200	\$225	\$720,000
Life Church (before redevelopment)	Downtown - Fort Mall		Occupied Traditional Retail			\$0	\$0
Platinum Skin - Laser Lash Skincare	Downtown - Fort Mall	DOWNTOWN	Personal Services		1,409	\$225	\$317,025
Romantic Secrets (before redevelopment)	Downtown - Fort Mall	DOWNTOWN	Specialty Retail	48120	1,410	\$161	\$227,363
Royal LePage Realty (before redevelopment)	Downtown - Fort Mall		Occupied Traditional Retail			\$0	\$0
Sewyn Time (before redevelopment)	Downtown - Fort Mall	DOWNTOWN	Specialty Retail	313310	750	\$161	\$120,938
Shadified Salon & Spa	Downtown - Fort Mall	DOWNTOWN	Health & Beauty		1,600	\$319	\$510,000
Specialty Gifts and Novelties (before redevelopment)	Downtown - Fort Mall	DOWNTOWN	Specialty Retail	45299	750	\$161	\$120,938
Two Sergeants Brew House	Downtown - Fort Mall	DOWNTOWN	Full Service F&B		2,492	\$263	\$654,150
Work n' Play Clothing Company	Downtown - Fort Mall	DOWNTOWN	Clothing & Apparel		2,720	\$188	\$510,000

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Retail Business Name	Retail Node	Retail Cluster (DOWNTOWN, CENTRAL, SOUTH, DOWNTOWN, WEST	General Retail Category	NAICS	Est. Area (SF)	Est. Sales Productivity Estimate Based on Building, Location, Tenant etc.	Est. Annual Sales Based on Building, Location, Tenant etc.	
7-Eleven	Riverpointe/Westview	WEST	Grocery & Specialty Foods	44711	3,023	\$413	\$1,246,823	
Angie's Liquor	Riverpointe/Westview	WEST	Alcohol & Tobacco	44531	1,546	\$475	\$734,421	
Buster's Pizza	Riverpointe/Westview	WEST	Limited Service F&B	722511	1,584	\$500	\$792,200	
Curves	Riverpointe/Westview	WEST	Personal Services	812190	1,527	\$300	\$458,235	
Gloria's Soup Spot	Riverpointe/Westview	WEST	Limited Service F&B	722512	1,546	\$375	\$579,806	
Herbal One Weightloss	Riverpointe/Westview	WEST	Specialty Retail	44529	1,527	\$161	\$246,301	
Johnny B Fitt	Riverpointe/Westview	WEST	Entertainment & Leisure	713940	10,000	\$200	\$2,000,000	
Master Cleaner	Riverpointe/Westview	WEST	Specialty Retail	812320	955	\$269	\$256,535	
Panago	Riverpointe/Westview	WEST	Limited Service F&B	722512	1,299	\$500	\$649,400	
Pineview Liquor Store	Riverpointe/Westview	WEST	Alcohol & Tobacco	44531	2,357	\$356	\$839,699	
Pure Yoga	Riverpointe/Westview	WEST	Personal Services		3,000	\$225	\$675,000	
Rainbow Restaurant	Riverpointe/Westview	WEST	Full Service F&B	722511	3,818	\$263	\$1,002,278	
Retreat Salon and Spa	Riverpointe/Westview	WEST	Health & Beauty	812115	2,524	\$319	\$804,413	
Shear Avenue	Riverpointe/Westview	WEST	Health & Beauty	812115	1,527	\$319	\$486,875	
Shell Select C-Store	Riverpointe/Westview	WEST	Grocery & Specialty Foods	44711	1,119	\$413	\$461,773	
Tantalize Tanning	Riverpointe/Westview	WEST	Personal Services	812115	1,527	\$225	\$343,676	
The Medicine Shoppe	Riverpointe/Westview	WEST	Pharmacy	446110	1,200	\$450	\$540,000	
Urban Dog Spaw	Riverpointe/Westview	WEST	Personal Services	812910	1,238	\$225	\$278,651	
Vacant	Riverpointe/Westview	WEST	VACANT		2,565	\$0	\$0	
Vacant	Riverpointe/Westview	WEST	VACANT		1,446	\$0	\$0	
Vacant (MACS redevelopment)	Riverpointe/Westview	WEST	VACANT		2,471	\$0	\$0	
Vacant (formerly Movie Experts)	Riverpointe/Westview	WEST	VACANT		1,527	\$0	\$0	
Westview Medical Clinic	Riverpointe/Westview		Occupied Traditional Retail	621499		\$0	\$0	
Willow Creek Homestore	Riverpointe/Westview	WEST	Home Furnishings & Accessories	442298	1,226	\$176	\$216,030	
7-Eleven	Dow Centre/Galloway Sqwai	SOUTH	Grocery & Specialty Foods	447110	2,628	\$550	\$1,445,510	
Amato Gelato	Dow Centre/Galloway Sqwai	SOUTH	Limited Service F&B	722512	675	\$375	\$253,088	
Body TX Massage	Dow Centre/Galloway Sqwai	SOUTH	Personal Services	812190	1,075	\$225	\$241,931	
Booster Juice	Dow Centre/Galloway Sqwai	SOUTH	Limited Service F&B	722512	255	\$500	\$127,500	
Eclipse Health and Fitness	Dow Centre/Galloway Sqwai	SOUTH	Health & Beauty	71394	1,726	\$425	\$733,699	
Fabutan	Dow Centre/Galloway Sqwai	SOUTH	Personal Services	812115	1,080	\$225	\$242,888	
G & G Café	Dow Centre/Galloway Sqwai	SOUTH	Limited Service F&B	722512	255	\$375	\$95,625	
Kids Fort Day Care	Dow Centre/Galloway Sqwai	SOUTH	Personal Services	624410	2,835	\$225	\$637,819	
Montana's BBQ & Bar	Dow Centre/Galloway Sqwai	SOUTH	Full Service F&B		3,000	\$350	\$1,050,000	
Quick Lube	Dow Centre/Galloway Sqwai	SOUTH	Auto Parts & Accessories	811199	1,510	\$350	\$528,658	
ReMax	Dow Centre/Galloway Square		Occupied Traditional Retail			\$0	\$0	
Ricky's Restaurant	Dow Centre/Galloway Sqwai	SOUTH	Full Service F&B	722511	5,095	\$438	\$2,229,019	
A-Bundance Bakery	Westpark	SOUTH	Limited Service F&B	722512	1,697	\$500	\$848,300	
Cameron Dental	Westpark	SOUTH	Personal Services		2,000	\$225	\$450,000	
Econo Liquor	Westpark	SOUTH	Alcohol & Tobacco	44531	2,278	\$475	\$1,082,050	
Flower Petals	Westpark	SOUTH	Specialty Retail	45311	861	\$215	\$185,126	
Husky Market	Westpark	SOUTH	Grocery & Specialty Foods	44711	2,153	\$550	\$1,184,178	
Mantra Salon Spa	Westpark	SOUTH	Health & Beauty	812115	1,650	\$425	\$701,186	
Mary Browns	Westpark	SOUTH	Limited Service F&B	722512	1,069	\$500	\$534,650	
Pizza Delight	Westpark	SOUTH	Full Service F&B	722511	3,084	\$350	\$1,079,330	
Planet Beach	Westpark	SOUTH	Personal Services	812115	971	\$300	\$291,300	
Rexall	Westpark	SOUTH	Pharmacy	44611	9,732	\$450	\$4,379,243	
River City Cigar Co.	Westpark	SOUTH	Alcohol & Tobacco	413310	983	\$356	\$350,051	
Sawmill	Westpark	SOUTH	Full Service F&B	722511	5,389	\$263	\$1,414,613	
Second Cup Coffee	Westpark	SOUTH	Limited Service F&B	722511	2,371	\$375	\$888,994	
Shell Food Mart	Westpark	SOUTH	Grocery & Specialty Foods	44711	1,952	\$413	\$805,386	
Shoppers Drug Mart	Westpark	SOUTH	Pharmacy		16,000	\$750	\$12,000,000	
Telus	Westpark	SOUTH	Specialty Retail	532210	1,069	\$161	\$172,425	
The Canadian Brewhouse	Westpark	SOUTH	Full Service F&B		6,000	\$438	\$2,625,000	
Tim Hortons	Westpark	SOUTH	Limited Service F&B	722512	2,603	\$375	\$976,013	
Wendy's	Westpark	SOUTH	Limited Service F&B		2,900	\$625	\$1,812,500	
Westpark Beverage Liquor Store	Westpark	SOUTH	Alcohol & Tobacco	44531	810	\$475	\$384,774	
Wok n'go	Westpark	SOUTH	Limited Service F&B	722512	929	\$375	\$348,394	
Heartland Ford	Freestanding	SOUTH	Auto/RV/Motorsports Dealership	441110	24,129	\$531	\$12,818,505	
						1,194,049	\$357	\$426,723,624

B APPENDIX | CONSUMER SURVEY OPEN-ENDED RETAILER RESPONSES

Retailer / Tenant Type	Merchandise Category	Number of Responses
Costco	General Merchandise	58
Chapters/Indigo	Books & Multi-Media	44
Winners	Clothing & Apparel	39
The Keg	Full Service F&B	33
Wendys	Limited Service F&B	30
Earl's	Full Service F&B	30
Best Buy	Home Electronics & Appliances	27
Sport Chek	Sporting Goods & Outdoor Recreation	25
Montana's Cookhouse	Full Service F&B	24
Michael's	Specialty Retail	21
Future Shop	Home Electronics & Appliances	21
Real Canadian Superstore	General Merchandise	20
Cleo's	Clothing & Apparel	19
Moxie's	Full Service F&B	17
Sobeys	Grocery & Specialty Foods	13
Save On Foods	Grocery & Specialty Foods	13
Home Sense	Home Furnishings & Accessories	12
Bootlegger	Clothing & Apparel	12
Old Navy	Clothing & Apparel	11
Ricki's	Clothing & Apparel	10
Olive Garden	Full Service F&B	10
Lululemon	Clothing & Apparel	10
Children's Place	Clothing & Apparel	10
Swiss Chalet	Full Service F&B	9
Petsmart	Specialty Retail	9
Tan Jay	Footwear	8
Burger King	Limited Service F&B	8
Toys R Us	Toys & Hobbies	7
Tony Roma's	Full Service F&B	7
Red Robin	Full Service F&B	7
Red Lobster	Full Service F&B	7
Lowe's	Home Improvement & Gardening	7
Coras Breakfast	Full Service F&B	7
Stitches	Clothing & Apparel	6
Spring	Footwear	6
Penningtons	Clothing & Apparel	6
Marshalls	Clothing & Apparel	6
Laura's	Clothing & Apparel	6

Retailer / Tenant Type	Merchandise Category	Number of Responses
Justice	Clothing & Apparel	6
Joey's Only	Full Service F&B	6
Gap	Clothing & Apparel	6
American Eagle	Clothing & Apparel	6
Aldo	Footwear	6
Addition Elle	Clothing & Apparel	6
HMV	Books & Multi-Media	5
Cabelas	Sporting Goods & Outdoor Recreation	5
Arby's	Full Service F&B	5
Alia	Clothing & Apparel	5
West 49	Clothing & Apparel	4
The Bay	General Merchandise	4
Suzanne's	Clothing & Apparel	4
Sears	General Merchandise	4
Pink	Clothing & Apparel	4
Pier 1	Home Furnishings & Accessories	4
Northern Reflections	Clothing & Apparel	4
Eastside Mario's	Full Service F&B	4
Coles	Books & Multi-Media	4
Ardene's	Jewelry & Accessories	4
Victoria's Secret	Clothing & Apparel	3
Shoe Warehouse	Footwear	3
Rona	Home Improvement & Gardening	3
Kins Market	Grocery & Specialty Foods	3
Joeys	Full Service F&B	3
Famosa	Limited Service F&B	3
Carter's	Clothing & Apparel	3
Cactus Club	Full Service F&B	3
Below The Belt	Clothing & Apparel	3
Aeropostale	Clothing & Apparel	3
Value Village	General Merchandise	2
Skechers	Footwear	2
Pro Bike Shop	Sporting Goods & Outdoor Recreation	2
Please Mum	Clothing & Apparel	2
Moores	Clothing & Apparel	2
London Drugs	General Merchandise	2
Le Chateau	Clothing & Apparel	2
La Senza	Clothing & Apparel	2
Kinkos	Specialty Retail	2

B

Retailer / Tenant Type	Merchandise Category	Number of Responses
IKEA	Home Furnishings & Accessories	2
Home Outfitters	Home Furnishings & Accessories	2
Hallmark/Carlton Cards	Specialty Retail	2
H&M	Clothing & Apparel	2
Guess	Clothing & Apparel	2
Global Pet Food	Specialty Retail	2
Garage	Clothing & Apparel	2
Gap Kids	Clothing & Apparel	2
Foot Locker	Footwear	2
Five Guys Burger & Fries	Limited Service F&B	2
Eddie Bauer	Clothing & Apparel	2
EB Games	Toys & Hobbies	2
Curves	Personal Services	2
Chopped Leaf	Limited Service F&B	2
Chili's	Full Service F&B	2
Cheesecake Factory	Full Service F&B	2
Bulk Barn	Specialty Retail	2
Bluenotes	Clothing & Apparel	2
Bed Bath & Beyond	Home Furnishings & Accessories	2
Bath & Body Works	Health & Beauty	2
Apple Store	Home Electronics & Appliances	2
Zara	Clothing & Apparel	1
Whole Foods	Grocery & Specialty Foods	1
VW Dealership	Auto/RV/Motorsports Dealerships	1
Urban Planet	Clothing & Apparel	1
Toyota	Auto/RV/Motorsports Dealerships	1
Town Shoes	Footwear	1
Tim Hortons	Limited Service F&B	1
TGIF	Full Service F&B	1
Teavana	Limited Service F&B	1
Target	General Merchandise	1
Tara Breads	Grocery & Specialty Foods	1
Taco Time	Limited Service F&B	1
Suzy Shier	Clothing & Apparel	1
Stokes	Home Furnishings & Accessories	1
Sterling	Footwear	1
State Farm Insurance	Personal Services	1
Starbucks	Limited Service F&B	1
Sof Moc	Footwear	1
Smart Set	Clothing & Apparel	1
Shoe Company	Footwear	1
Sephora	Health & Beauty	1
Second Cup	Limited Service F&B	1
Sarento's	Full Service F&B	1

Retailer / Tenant Type	Merchandise Category	Number of Responses
RW & CO	Clothing & Apparel	1
Runners World	Footwear	1
Royale Pizza	Limited Service F&B	1
ROSS	Clothing & Apparel	1
Quilts etc	Home Furnishings & Accessories	1
Osh Kosh	Clothing & Apparel	1
Old Spaghetti Factory	Full Service F&B	1
New York Fries	Limited Service F&B	1
Naturalizer	Footwear	1
Nando's Chicken	Limited Service F&B	1
Mr Mikes	Full Service F&B	1
Moutain Equipment Coop	Sporting Goods & Outdoor Recreation	1
Mongolian Grill	Limited Service F&B	1
LL Bean	Clothing & Apparel	1
Kelsey's	Full Service F&B	1
Kal Tire	Auto Parts, Services & Accessories	1
Izod	Clothing & Apparel	1
IHOP	Full Service F&B	1
Harvey's	Limited Service F&B	1
Golf Town	Sporting Goods & Outdoor Recreation	1
Forever 21	Clothing & Apparel	1
Ecco Shoes	Footwear	1
Dynamite	Clothing & Apparel	1
Denny's	Full Service F&B	1
Claire's	Jewelry & Accessories	1
Carter's	Clothing & Apparel	1
Carl's Jr	Limited Service F&B	1
Buffalo	Clothing & Apparel	1
Body Shop	Health & Beauty	1
Bellissima	Clothing & Apparel	1
Bella Maas Boutique	Clothing & Apparel	1
Bata Shoes	Footwear	1
Bass Pro	Sporting Goods & Outdoor Recreation	1
Banana Republic	Clothing & Apparel	1
Baby Palace	Clothing & Apparel	1
Axe Music	Specialty Retail	1
Atmosphere	Sporting Goods & Outdoor Recreation	1
Aritzia	Clothing & Apparel	1
Applebees	Full Service F&B	1
Andrea's	Clothing & Apparel	1

B

Retailer / Tenant Type	Merchandise Category	Number of Responses
Boutiques Downtown	Clothing & Apparel	4
Organic Food Store	Grocery & Specialty Foods	4
Womens Clothing	Clothing & Apparel	14
Childrens Clothing	Clothing & Apparel	9
Fabric Store	Specialty Retail	3
Greenhouses	Home Improvement & Gardening	1
Mens Clothing	Clothing & Apparel	9
Shoe Stores	Footwear	11
Snowboard/Bike/Runner	Sporting Goods & Outdoor Recreation	4
Fish/Meat Market	Grocery & Specialty Foods	4
Department Store	General Merchandise	1
Hair Salon	Personal Services	3
Childcare	Personal Services	2
Medical Clinic	Personal Services	1
Auto Parts/Repair/Body Shop	Auto Parts, Services & Accessories	6
Travel Agency	Personal Services	2
Windshield Repair	Auto Parts, Services & Accessories	2
Bowling Alley	Entertainment & Leisure	1
Movie Theatre	Entertainment & Leisure	16
Live Theatre	Entertainment & Leisure	1
Sports Bars/Pubs	Entertainment & Leisure	2
Paintball/Laser Tag	Entertainment & Leisure	1
Casino	Entertainment & Leisure	2
Live Music Club	Entertainment & Leisure	3
Family Fun Activities	Entertainment & Leisure	4
Arcade & Game Room	Entertainment & Leisure	1
Shooting Range	Entertainment & Leisure	1
Hot Yoga	Personal Services	2
Brazilian Steakhouse	Full Service F&B	1
Locally Owned Cafes	Limited Service F&B	7
Local Family Dining	Full Service F&B	11
Local Fine Dining	Full Service F&B	4
Local Steakhouse	Full Service F&B	2
Ethnic		5
East Indian		4
Chinese		4
Mexican		1
Greek		1
Japanese		3
Thai		3
Food Trucks		1

FORT SASKATCHEWAN CONSUMER SURVEY

INTERVIEW LOCATION

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	DOW CENTENNIAL CENTRE	50	25.0	25.0	25.0
	CORNERSTONE CENTRE	68	34.0	34.0	59.0
	DOWNTOWN FS	57	28.5	28.5	87.5
	THE KANATA	25	12.5	12.5	100.0
	Total	200	100.0	100.0	

CITY RESPONDENT RESIDES

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	PART TIME RESIDENT	30	15.0	15.0	15.0
	CITY OF FT SASKATCHEWAN	125	62.5	62.5	77.5
	STURGEON COUNTY	5	2.5	2.5	80.0
	GIBBONS	3	1.5	1.5	81.5
	SHERWOOD PARK	3	1.5	1.5	83.0
	STRATHCONA COUNTY	6	3.0	3.0	86.0
	OTHER	28	14.0	14.0	100.0
	Total	200	100.0	100.0	

Q1A. PRIMARY CONVENIENCE SHOPPING CENTER

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	NO CONVENIENCE PRIMARY	1	.5	.5	.5
	DOWNTOWN FS	12	6.0	6.0	6.5
	CORNERSTONE CENTRE	71	35.5	35.5	42.0
	SOUTHPOINTE	3	1.5	1.5	43.5
	COSTCO NE EDM	2	1.0	1.0	44.5
	SAFEWAY	55	27.5	27.5	72.0
	NO FRILLS	28	14.0	14.0	86.0
	OTHER SC	28	14.0	14.0	100.0
	Total	200	100.0	100.0	

APPENDIX | CONSUMER SURVEY FULL RESONSES RAW DATA ALL RESPONDENTS

FORT SASKATCHEWAN CONSUMER SURVEY

\$Q1C Frequencies

		Responses		Percent of Cases
		N	Percent	
Q1C. MAIN REASONS SHOP PRIMARY CONVENIENCE SC - Multiple Response ^a	CLOSE TO HOME	59	13.5%	29.5%
	CLOSE WORK HOTEL	21	4.8%	10.5%
	PRICES	83	19.0%	41.5%
	ONE STOP SHOP	39	8.9%	19.5%
	NOT CROWDED	3	.7%	1.5%
	FAMILIARITY	41	9.4%	20.5%
	PARKING	1	.2%	.5%
	CUSTOMER SERVICE	14	3.2%	7.0%
	SALES PROMOS	24	5.5%	12.0%
	BUY IN BULK	5	1.1%	2.5%
	SUPPORT LOCAL	12	2.7%	6.0%
	SELECTION PRODUCTS	18	4.1%	9.0%
	SELECTION STORES	2	.5%	1.0%
	SHOP SPECIFIC STORE	1	.2%	.5%
	SPECIFIC ITEM BRAND	34	7.8%	17.0%
	IN THE AREA	3	.7%	1.5%
	QUALITY PRODUCTS	38	8.7%	19.0%
	CONVENIENCE ITEMS	7	1.6%	3.5%
	MEETS NEEDS	10	2.3%	5.0%
	PROXIMITY OTHER AREAS	4	.9%	2.0%
	QUALITY STORES	1	.2%	.5%
EASY ACCESS	14	3.2%	7.0%	
HOURS OF OPERATION	3	.7%	1.5%	
Total		437	100.0%	218.5%

a. Group

FORT SASKATCHEWAN CONSUMER SURVEY

Q2A. PRIMARY COMPARISON SHOPPING CENTER

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid NO COMPARISON PRIMARY	10	5.0	5.0	5.0
DOWNTOWN FS	2	1.0	1.0	6.0
CORNERSTONE CENTRE	72	36.0	36.0	42.0
COSTCO NE EDM	2	1.0	1.0	43.0
EMERALD HILLS	3	1.5	1.5	44.5
SHERWOOD PARK MALL	43	21.5	21.5	66.0
OTHER SC	68	34.0	34.0	100.0
Total	200	100.0	100.0	

\$Q2C Frequencies

		Responses		Percent of Cases
		N	Percent	
Q2C. MAIN REASONS	NO SPECIFIC REASON	1	.2%	.5%
SHOP PRIMARY	CLOSE TO HOME	33	7.7%	16.5%
COMPARISON SC - Multiple Response ^a	CLOSE WORK HOTEL	11	2.6%	5.5%
	PRICES	57	13.4%	28.5%
	ONE STOP SHOP	44	10.3%	22.0%
	NOT CROWDED	4	.9%	2.0%
	FAMILIARITY	10	2.3%	5.0%
	PARKING	5	1.2%	2.5%
	CUSTOMER SERVICE	7	1.6%	3.5%
	SALES PROMOS	9	2.1%	4.5%
	SUPPORT LOCAL	10	2.3%	5.0%
	SELECTION PRODUCTS	29	6.8%	14.5%
	SELECTION STORES	78	18.3%	39.0%
	SHOP SPECIFIC STORE	28	6.6%	14.0%
	SPECIFIC ITEM BRAND	13	3.1%	6.5%
	DAY OUT WINDOW SHOP	2	.5%	1.0%
	IN THE AREA	5	1.2%	2.5%
	QUALITY PRODUCTS	8	1.9%	4.0%
	COMPARISON ITEMS	1	.2%	.5%
	CLOTHING	28	6.6%	14.0%
	SHOES	3	.7%	1.5%
	MEETS NEEDS	18	4.2%	9.0%
	PROXIMITY OTHER AREAS	2	.5%	1.0%
	QUALITY STORES	7	1.6%	3.5%
	DEPARTMENT STORES	4	.9%	2.0%
	EASY ACCESS	9	2.1%	4.5%
Total		426	100.0%	213.0%

a. Group



FORT SASKATCHEWAN CONSUMER SURVEY

Descriptive Statistics

	N	Min	Max	Mean	SD
Q3A. % SPEND CLOTHES FOOTWEAR FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	30.5	36.8
Q3B. % SPEND CLOTHES FOOTWEAR OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	65.5	38.7
Q3C. IMPORTANCE RATING ADD CLOTHING FOOTWEAR TO FT SASKATCHEWAN	200	1	10	7.2	3.3
Q4A. % SPEND BOOKS MUSIC FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	19.9	36.1
Q4B. % SPEND BOOK MUSIC OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	42.2	46.4
Q4C. IMPORTANCE RATING ADD BOOKS MUSIC TO FT SASKATCHEWAN	200	1	10	5.7	3.8
Q5A. % SPEND ELECTRONICS COMPUTERS FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	23.3	39.2
Q5B. % SPEND ELECTRONICS COMPUTERS OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	31.7	43.8
Q5C. IMPORTANCE RATING ADD ELECTRONICS COMPUTERS TO FT SASKATCHEWAN	200	1	10	5.5	3.6
Q6A. % SPEND FURNISHINGS APPLIANCES FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	19.9	37.8
Q6B. % SPEND FURNISHINGS APPLIANCES OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	30.6	44.4
Q6C. IMPORTANCE RATING ADD FURNISHINGS APPLIANCES TO FT SASKATCHEWAN	200	1	10	5.1	3.4
Q7A. % SPEND SPORTING GOODS TOYS CRAFTS HOBBIES FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	26.9	37.1
Q7B. % SPEND SPORTING GOODS TOYS HOBBIES CRAFTS OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	41.6	42.9
Q7C. IMPORTANCE RATING ADD SPORTING GOODS TOYS HOBBIES CRAFTS TO FT SASKATCHEWAN	200	1	10	5.6	3.4
Q8A. % SPEND SPECIALTY RETAIL FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	21.0	36.9
Q8B. % SPEND SPECIALTY RETAIL OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	26.0	40.3
Q8C. IMPORTANCE RATING ADD SPECIALTY RETAIL TO FT SASKATCHEWAN	200	1	10	4.4	3.2
Q9A. % SPEND GROCERY DRUGSTORE FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	74.3	34.9

FORT SASKATCHEWAN CONSUMER SURVEY

Descriptive Statistics

	N	Min	Max	Mean	SD
Q9B. % SPEND GROCERY DRUGSTORE OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	25.2	34.5
Q9C. IMPORTANCE RATING ADD GROCERY DRUGSTORE TO FT SASKATCHEWAN	200	1	10	6.0	3.8
Q10A. % SPEND HOME IMPROVEMENT GARDEN FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	52.8	46.4
Q10B. % SPEND HOME IMPROVEMENT GARDEN OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	19.2	34.7
Q10C. IMPORTANCE RATING ADD HOME IMPROVEMENT GARDEN TO FT SASKATCHEWAN	200	1	10	4.9	3.5
Q11A. % SPEND OFFICE SUPPLIES FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	53.4	48.3
Q11B. % SPEND OFFICE SUPPLIES OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	16.1	34.4
Q11C. IMPORTANCE RATING ADD OFFICE SUPPLIES TO FT SASKATCHEWAN	200	1	10	4.2	3.4
Q12A. % SPEND PET SUPPLIES SERVICES FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	34.8	46.4
Q12B. % SPEND PET SUPPLIES SERVICES OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	19.7	38.3
Q12C. IMPORTANCE RATING ADD PET SUPPLIES SERVICES TO FT SASKATCHEWAN	200	1	10	4.2	3.6
Q13A. % SPEND AUTOMOTIVE FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	45.3	47.4
Q13B. % SPEND AUTOMOTIVE OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	30.2	43.3
Q13C. IMPORTANCE RATING ADD AUTOMOTIVE TO FT SASKATCHEWAN	200	1	10	4.6	3.7
Q14A. % USE PERSONAL SERVICES FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	54.2	46.1
Q14B. % USE PERSONAL SERVICES OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	28.3	40.8
Q14C. IMPORTANCE RATING ADD PERSONAL SERVICES TO FT SASKATCHEWAN	200	1	10	4.3	3.6
Q15A. % USE PROFESSIONAL FINANCIAL SERVICES FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	64.4	41.7
Q15B. % USE PROFESSIONAL FINANCIAL SERVICES OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	34.1	41.2
Q15C. IMPORTANCE RATING ADD PROFESSIONAL FINANCIAL SERVICES TO FT SASKATCHEWAN	200	1	10	4.0	3.4
Q16A. % USE FITNESS DAY SPA FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	41.9	47.7
Q16B. % USE FITNESS DAY SPA OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	11.6	29.3



FORT SASKATCHEWAN CONSUMER SURVEY

Descriptive Statistics

	N	Min	Max	Mean	SD
Q16C. IMPORTANCE RATING ADD FITNESS DAY SPA TO FT SASKATCHEWAN	200	1	10	3.8	3.4
Q17A. % GO TO COFFEE CAFE FAST FOOD FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	66.8	35.6
Q17B. % GO TO COFFEE CAFE FAST FOOD OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	24.2	29.7
Q17C. IMPORTANCE RATING ADD COFFEE CAFE FAST FOOD TO FT SASKATCHEWAN	200	1	10	5.1	3.5
Q18A. % EAT OUT FULL SERVICE RESTAURANTS FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	50.3	37.4
Q18B. % EAT OUT FULL SERVICE RESTAURANTS OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	41.7	36.4
Q18C. IMPORTANCE RATING ADD FULL SERVICE RESTAURANTS TO FT SASKATCHEWAN	200	1	10	7.2	3.3
Q19A. % USE ENTERTAINMENT FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	31.3	40.0
Q19B. % USE ENTERTAINMENT OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	200	0	100	42.8	43.6
Q19C. IMPORTANCE RATING ADD ENTERTAINMENT TO FT SASKATCHEWAN	200	1	10	5.7	3.7
Valid N (listwise)	200				

FORT SASKATCHEWAN CONSUMER SURVEY

\$Q20 Frequencies

		Responses		Percent of Cases
		N	Percent	
Q20. LIKE MOST ABOUT SHOPPING OPPORTUNITIES IN FT SASKATCHEWAN - Multiple Response ^a	NOTHING SPECIFIC	2	.5%	1.0%
	CLOSE TO HOME	68	15.5%	34.0%
	CLOSE TO WORK HOTEL	18	4.1%	9.0%
	PRICES SALES PROMOS	9	2.0%	4.5%
	ONE STOP SHOP	19	4.3%	9.5%
	NOT CROWDED	9	2.0%	4.5%
	MEETS NEEDS	74	16.8%	37.0%
	PARKING TRAFFIC	12	2.7%	6.0%
	CUSTOMER SERVICE	31	7.0%	15.5%
	EASY ACCESS	38	8.6%	19.0%
	SELECTION STORES	1	.2%	.5%
	SELECTION RESTAURANTS	2	.5%	1.0%
	LIKE SPECIFIC STORE	14	3.2%	7.0%
	SELECTION PRODUCTS	4	.9%	2.0%
	IN STOCK	1	.2%	.5%
	PROXIMITY OTHER AREAS	23	5.2%	11.5%
	SUPPORT LOCAL	41	9.3%	20.5%
	FAMILIARITY	8	1.8%	4.0%
	QUALITY STORES	2	.5%	1.0%
	HOURS OF OPERATION	3	.7%	1.5%
DOWNTOWN FS	40	9.1%	20.0%	
GREENSPACE	6	1.4%	3.0%	
ACTIVITIES	15	3.4%	7.5%	
Total		440	100.0%	220.0%

a. Group



FORT SASKATCHEWAN CONSUMER SURVEY

\$Q21 Frequencies

		Responses		Percent of Cases
		N	Percent	
Q21. DISLIKE MOST ABOUT SHOPPING OPPORTUNITES IN FT SASKATCHEWAN - Multiple Response ^a	NOTHING SPECIFIC	34	12.8%	17.0%
	PRICES SALES PROMOS	5	1.9%	2.5%
	CROWDED	4	1.5%	2.0%
	PARKING TRAFFIC	1	.4%	.5%
	CUSTOMER SERVICE	7	2.6%	3.5%
	ACCESS	10	3.8%	5.0%
	SELECTION STORES	133	50.2%	66.5%
	SELECTION RESTAURANTS	31	11.7%	15.5%
	MISSING SPECIFIC STORE	3	1.1%	1.5%
	PROFESSIONAL PERSONAL SERVICES	2	.8%	1.0%
	SELECTION PRODUCTS	3	1.1%	1.5%
	NOT IN STOCK	2	.8%	1.0%
	QUALITY STORES	1	.4%	.5%
	EMPTY BUILDINGS	1	.4%	.5%
	HOURS OF OPERATION	7	2.6%	3.5%
	LACKS ENTERTAINMENT	4	1.5%	2.0%
	LACKS ACTIVITIES	1	.4%	.5%
	NO MALL	16	6.0%	8.0%
Total		265	100.0%	132.5%

a. Group

FORT SASKATCHEWAN CONSUMER SURVEY

\$Q22 Frequencies

		Responses		Percent of Cases
		N	Percent	
Q22. STORES SERVICES INCREASE SPENDING IN FT SASKATCHEWAN - Multiple Response ^a	NOTHING SPECIFIC	7	.9%	3.5%
	DEPT STORE	16	2.1%	8.0%
	WINNERS	36	4.8%	18.0%
	CLOTHING FOOTWEAR	156	20.9%	78.0%
	BOOKS MUSIC DVD	42	5.6%	21.0%
	ELECTRONICS COMPUTERS	35	4.7%	17.5%
	FURNISHINGS APPLIANCES	16	2.1%	8.0%
	SPORTING GOODS	31	4.2%	15.5%
	SPECIALTY RETAIL	11	1.5%	5.5%
	GROCERY DRUGSTORE	54	7.2%	27.0%
	HOME IMPROVEMENT GARDEN	7	.9%	3.5%
	OFFICE SUPPLY ITEMS	6	.8%	3.0%
	PET SUPPLIES SERVICES	5	.7%	2.5%
	AUTOMOTIVE	6	.8%	3.0%
	PERSONAL SERVICES	3	.4%	1.5%
	PROFESSIONAL FINANCIAL SERVICES	1	.1%	.5%
	FITNESS CLUB DAY SPA	7	.9%	3.5%
	COFFEE CAFES FAST FOOD	44	5.9%	22.0%
	FULL SERVICE RESTAURANTS	142	19.0%	71.0%
	ENTERTAINMENT	30	4.0%	15.0%
	A MALL	4	.5%	2.0%
	TOYS HOBBIES CRAFTS	31	4.2%	15.5%
	COSTCO	56	7.5%	28.0%
Total		746	100.0%	373.0%

a. Group



FORT SASKATCHEWAN CONSUMER SURVEY

Statistics

		D1. HOUSEHOLD SIZE	D2. # HOUSEHOLD < 18 YEARS OLD
N	Valid	200	200
	Missing	0	0
Mean		3.04	.78

D1. HOUSEHOLD SIZE

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	16	8.0	8.0	8.0
	2	73	36.5	36.5	44.5
	3	34	17.0	17.0	61.5
	4	50	25.0	25.0	86.5
	5	22	11.0	11.0	97.5
	6	2	1.0	1.0	98.5
	7	3	1.5	1.5	100.0
Total		200	100.0	100.0	

D2. # HOUSEHOLD < 18 YEARS OLD

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	0	116	58.0	58.0	58.0
	1	32	16.0	16.0	74.0
	2	37	18.5	18.5	92.5
	3	11	5.5	5.5	98.0
	4	3	1.5	1.5	99.5
	5	1	.5	.5	100.0
Total		200	100.0	100.0	

FORT SASKATCHEWAN CONSUMER SURVEY

D3. RESPONDENT AGE

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid 18-24	27	13.5	13.5	13.5
25-34	41	20.5	20.5	34.0
35-44	45	22.5	22.5	56.5
45-54	35	17.5	17.5	74.0
55-64	27	13.5	13.5	87.5
65-74	20	10.0	10.0	97.5
75+	5	2.5	2.5	100.0
Total	200	100.0	100.0	

D4. HOUSEHOLD YEARLY INCOME

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid REFUSED DK	20	10.0	10.0	10.0
<\$15,000	1	.5	.5	10.5
\$15,000-\$24,999	7	3.5	3.5	14.0
\$25,000-\$34,999	7	3.5	3.5	17.5
\$35,000-\$44,999	5	2.5	2.5	20.0
\$45,000-\$54,999	12	6.0	6.0	26.0
\$55,000-\$64,999	16	8.0	8.0	34.0
\$65,000-\$74,999	16	8.0	8.0	42.0
\$75,000-\$99,999	30	15.0	15.0	57.0
\$100,000-\$124,999	41	20.5	20.5	77.5
\$125,000+	45	22.5	22.5	100.0
Total	200	100.0	100.0	

D5. RESPONDENT GENDER

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid MALE	73	36.5	36.5	36.5
FEMALE	127	63.5	63.5	100.0
Total	200	100.0	100.0	

APPENDIX | CONSUMER SURVEY FULL RESONSES RAW DATA PART-TIME RESPONDENTS ONLY

FORT SASKATCHEWAN CONSUMER SURVEY - PART-TIME RESIDENT

INTERVIEW LOCATION

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	DOW CENTENNIAL CENTRE	3	10.0	10.0	10.0
	CORNERSTONE CENTRE	3	10.0	10.0	20.0
	THE KANATA	24	80.0	80.0	100.0
	Total	30	100.0	100.0	

CITY RESPONDENT RESIDES

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	PART TIME RESIDENT	30	100.0	100.0	100.0

Q1A. PRIMARY CONVENIENCE SHOPPING CENTER

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	CORNERSTONE CENTRE	6	20.0	20.0	20.0
	SOUTHPOINTE	1	3.3	3.3	23.3
	SAFEWAY	6	20.0	20.0	43.3
	NO FRILLS	5	16.7	16.7	60.0
	OTHER SC	12	40.0	40.0	100.0
	Total	30	100.0	100.0	

FORT SASKATCHEWAN CONSUMER SURVEY - PART-TIME RESIDENT

\$Q1C Frequencies

		Responses		Percent of Cases
		N	Percent	
Q1C. MAIN REASONS SHOP PRIMARY CONVENIENCE SC - Multiple Response ^a	CLOSE TO HOME	6	11.5%	20.0%
	CLOSE WORK HOTEL	11	21.2%	36.7%
	PRICES	10	19.2%	33.3%
	ONE STOP SHOP	1	1.9%	3.3%
	FAMILIARITY	5	9.6%	16.7%
	CUSTOMER SERVICE	3	5.8%	10.0%
	SALES PROMOS	1	1.9%	3.3%
	BUY IN BULK	1	1.9%	3.3%
	SELECTION PRODUCTS	1	1.9%	3.3%
	SPECIFIC ITEM BRAND	4	7.7%	13.3%
	QUALITY PRODUCTS	3	5.8%	10.0%
	QUALITY STORES	1	1.9%	3.3%
	EASY ACCESS	3	5.8%	10.0%
	HOURS OF OPERATION	2	3.8%	6.7%
	Total	52	100.0%	173.3%

a. Group

Q2A. PRIMARY COMPARISON SHOPPING CENTER

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	NO COMPARISON PRIMARY	2	6.7	6.7	6.7
	CORNERSTONE CENTRE	13	43.3	43.3	50.0
	OTHER SC	15	50.0	50.0	100.0
	Total	30	100.0	100.0	

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FORT SASKATCHEWAN CONSUMER SURVEY - PART-TIME RESIDENT

\$Q2C Frequencies

		Responses		Percent of Cases
		N	Percent	
Q2C. MAIN REASONS	CLOSE TO HOME	3	6.1%	10.0%
SHOP PRIMARY	CLOSE WORK HOTEL	7	14.3%	23.3%
COMPARISON SC - Multiple Response ^a	PRICES	10	20.4%	33.3%
	ONE STOP SHOP	5	10.2%	16.7%
	NOT CROWDED	2	4.1%	6.7%
	CUSTOMER SERVICE	1	2.0%	3.3%
	SALES PROMOS	3	6.1%	10.0%
	SUPPORT LOCAL	1	2.0%	3.3%
	SELECTION STORES	9	18.4%	30.0%
	SHOP SPECIFIC ...	1	2.0%	3.3%
	SPECIFIC ITEM BRAND	3	6.1%	10.0%
	QUALITY PRODUCTS	1	2.0%	3.3%
	MEETS NEEDS	2	4.1%	6.7%
	EASY ACCESS	1	2.0%	3.3%
Total		49	100.0%	163.3%

a. Group

FORT SASKATCHEWAN CONSUMER SURVEY - PART-TIME RESIDENT

Descriptive Statistics

	N	Min	Max	Mean	SD
Q3A. % SPEND CLOTHES FOOTWEAR FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	18.1	30.0
Q3B. % SPEND CLOTHES FOOTWEAR OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	81.9	30.0
Q3C. IMPORTANCE RATING ADD CLOTHING FOOTWEAR TO FT SASKATCHEWAN	30	1	10	3.6	3.7
Q4A. % SPEND BOOKS MUSIC FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	5.8	20.0
Q4B. % SPEND BOOK MUSIC OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	40.8	48.3
Q4C. IMPORTANCE RATING ADD BOOKS MUSIC TO FT SASKATCHEWAN	30	1	10	3.2	3.7
Q5A. % SPEND ELECTRONICS COMPUTERS FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	9.7	25.9
Q5B. % SPEND ELECTRONICS COMPUTERS OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	27.0	42.5
Q5C. IMPORTANCE RATING ADD ELECTRONICS COMPUTERS TO FT SASKATCHEWAN	30	1	10	3.3	3.4
Q6A. % SPEND FURNISHINGS APPLIANCES FT SASKATCHEWAN PAST 3 MONTHS	30	0	20	1.3	5.1
Q6B. % SPEND FURNISHINGS APPLIANCES OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	18.7	38.2
Q6C. IMPORTANCE RATING ADD FURNISHINGS APPLIANCES TO FT SASKATCHEWAN	30	1	7	1.8	1.8
Q7A. % SPEND SPORTING GOODS TOYS CRAFTS HOBBIES FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	6.2	19.0
Q7B. % SPEND SPORTING GOODS TOYS HOBBIES CRAFTS OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	40.5	47.5
Q7C. IMPORTANCE RATING ADD SPORTING GOODS TOYS HOBBIES CRAFTS TO FT SASKATCHEWAN	30	1	9	2.1	2.1
Q8A. % SPEND SPECIALTY RETAIL FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	5.5	18.7
Q8B. % SPEND SPECIALTY RETAIL OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	24.5	41.5
Q8C. IMPORTANCE RATING ADD SPECIALTY RETAIL TO FT SASKATCHEWAN	30	1	5	1.6	1.3



FORT SASKATCHEWAN CONSUMER SURVEY - PART-TIME RESIDENT

Descriptive Statistics

	N	Min	Max	Mean	SD
Q9A. % SPEND GROCERY DRUGSTORE FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	36.5	38.4
Q9B. % SPEND GROCERY DRUGSTORE OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	63.5	38.4
Q9C. IMPORTANCE RATING ADD GROCERY DRUGSTORE TO FT SASKATCHEWAN	30	1	10	4.0	4.1
Q10A. % SPEND HOME IMPROVEMENT GARDEN FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	7.3	25.5
Q10B. % SPEND HOME IMPROVEMENT GARDEN OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	36.0	48.3
Q10C. IMPORTANCE RATING ADD HOME IMPROVEMENT GARDEN TO FT SASKATCHEWAN	30	1	10	2.2	2.6
Q11A. % SPEND OFFICE SUPPLIES FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	18.8	38.0
Q11B	30	0	100	37.8	48.0
Q11C	30	1	10	2.7	3.2
Q12A. % SPEND PET SUPPLIES SERVICES FT SASKATCHEWAN PAST 3 MONTHS	30	0	50	1.7	9.1
Q12B	30	0	100	35.0	47.6
Q12C	30	1	5	1.5	1.3
Q13A. % SPEND AUTOMOTIVE FT SASKATCHEWAN PAST 3 MONTHS	29	0	100	28.4	45.2
Q13B	30	0	100	35.8	48.1
Q13C	30	1	10	1.8	2.0
Q14A. % USE PERSONAL SERVICES FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	17.8	35.1
Q14B. % USE PERSONAL SERVICES OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	75.5	40.4
Q14C. IMPORTANCE RATING ADD PERSONAL SERVICES TO FT SASKATCHEWAN	30	1	10	2.3	2.5
Q15A. % USE PROFESSIONAL FINANCIAL SERVICES FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	11.3	23.3
Q15B. % USE PROFESSIONAL FINANCIAL SERVICES OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	88.7	23.3
Q15C. IMPORTANCE RATING ADD PROFESSIONAL FINANCIAL SERVICES TO FT SASKATCHEWAN	30	1	9	1.8	1.9

FORT SASKATCHEWAN CONSUMER SURVEY - PART-TIME RESIDENT

Descriptive Statistics

	N	Min	Max	Mean	SD
Q16A. % USE FITNESS DAY SPA FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	15.7	35.0
Q16B. % USE FITNESS DAY SPA OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	21.0	39.7
Q16C. IMPORTANCE RATING ADD FITNESS DAY SPA TO FT SASKATCHEWAN	30	1	6	1.5	1.4
Q17A. % GO TO COFFEE CAFE FAST FOOD FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	43.2	33.1
Q17B. % GO TO COFFEE CAFE FAST FOOD OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	46.8	33.7
Q17C. IMPORTANCE RATING ADD COFFEE CAFE FAST FOOD TO FT SASKATCHEWAN	30	1	10	5.5	3.9
Q18A. % EAT OUT FULL SERVICE RESTAURANTS FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	45.0	31.9
Q18B. % EAT OUT FULL SERVICE RESTAURANTS OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	51.7	32.3
Q18C. IMPORTANCE RATING ADD FULL SERVICE RESTAURANTS TO FT SASKATCHEWAN	30	1	10	9.0	2.4
Q19A. % USE ENTERTAINMENT FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	7.5	25.3
Q19B. % USE ENTERTAINMENT OUTSIDE FT SASKATCHEWAN PAST 3 MONTHS	30	0	100	55.8	49.7
Q19C. IMPORTANCE RATING ADD ENTERTAINMENT TO FT SASKATCHEWAN	30	1	10	3.1	3.5
Valid N (listwise)	29				



FORT SASKATCHEWAN CONSUMER SURVEY - PART-TIME RESIDENT

\$Q20 Frequencies

		Responses		Percent of Cases
		N	Percent	
Q20. LIKE MOST ABOUT SHOPPING OPPORTUNITIES IN FT SASKATCHEWAN - Multiple Response ^a	NOTHING SPECIFIC	1	1.8%	3.3%
	CLOSE TO HOME	3	5.3%	10.0%
	CLOSE TO WORK HOTEL	15	26.3%	50.0%
	PRICES SALES PROMOS	2	3.5%	6.7%
	ONE STOP SHOP	2	3.5%	6.7%
	NOT CROWDED	1	1.8%	3.3%
	MEETS NEEDS	6	10.5%	20.0%
	PARKING TRAFFIC	1	1.8%	3.3%
	CUSTOMER SERVICE	6	10.5%	20.0%
	EASY ACCESS	5	8.8%	16.7%
	LIKE SPECIFIC STORE	3	5.3%	10.0%
	PROXIMITY OTHER AREAS	1	1.8%	3.3%
	SUPPORT LOCAL	1	1.8%	3.3%
	DOWNTOWN FS	5	8.8%	16.7%
	GREENSPACE	4	7.0%	13.3%
	ACTIVITIES	1	1.8%	3.3%
	Total		57	100.0%

a. Group

FORT SASKATCHEWAN CONSUMER SURVEY - PART-TIME RESIDENT

\$Q21 Frequencies

		Responses		Percent of Cases
		N	Percent	
Q21. DISLIKE MOST ABOUT SHOPPING OPPORTUNITES IN FT SASKATCHEWAN - Multiple Response ^a	NOTHING SPECIFIC	6	14.0%	20.0%
	CUSTOMER SERVICE	2	4.7%	6.7%
	ACCESS	2	4.7%	6.7%
	SELECTION STORES	10	23.3%	33.3%
	SELECTION RESTAURANTS	15	34.9%	50.0%
	HOURS OF OPERATION	4	9.3%	13.3%
	LACKS ENTERTAINMENT	1	2.3%	3.3%
	NO MALL	3	7.0%	10.0%
Total		43	100.0%	143.3%

a. Group

\$Q22 Frequencies

		Responses		Percent of Cases
		N	Percent	
Q22. STORES SERVICES INCREASE SPENDING IN FT SASKATCHEWAN - Multiple Response ^a	NOTHING SPECIFIC	1	.9%	3.3%
	WINNERS	3	2.8%	10.0%
	CLOTHING FOOTWEAR	4	3.7%	13.3%
	BOOKS MUSIC DVD	5	4.6%	16.7%
	ELECTRONICS COMPUTERS	8	7.4%	26.7%
	FURNISHINGS APPLIANCES	1	.9%	3.3%
	SPORTING GOODS	3	2.8%	10.0%
	GROCERY DRUGSTORE	3	2.8%	10.0%
	HOME IMPROVEMENT GARDEN	1	.9%	3.3%
	OFFICE SUPPLY ITEMS	5	4.6%	16.7%
	AUTOMOTIVE	2	1.9%	6.7%
	COFFEE CAFES FAST FOOD	11	10.2%	36.7%
	FULL SERVICE RESTAURANTS	51	47.2%	170.0%
	ENTERTAINMENT	6	5.6%	20.0%
	A MALL	1	.9%	3.3%
	COSTCO	3	2.8%	10.0%
Total		108	100.0%	360.0%

a. Group

Statistics

		D1. HOUSEHOLD SIZE	D2. # HOUSEHOLD < 18 YEARS OLD
N	Valid	30	30
	Missing	0	0
Mean		3.10	.73



FORT SASKATCHEWAN CONSUMER SURVEY - PART-TIME RESIDENT

D1. HOUSEHOLD SIZE

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid 1	5	16.7	16.7	16.7
2	8	26.7	26.7	43.3
3	3	10.0	10.0	53.3
4	8	26.7	26.7	80.0
5	5	16.7	16.7	96.7
6	1	3.3	3.3	100.0
Total	30	100.0	100.0	

D2. # HOUSEHOLD < 18 YEARS OLD

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid 0	21	70.0	70.0	70.0
2	5	16.7	16.7	86.7
3	4	13.3	13.3	100.0
Total	30	100.0	100.0	

D3. RESPONDENT AGE

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid 18-24	7	23.3	23.3	23.3
25-34	5	16.7	16.7	40.0
35-44	6	20.0	20.0	60.0
45-54	7	23.3	23.3	83.3
55-64	5	16.7	16.7	100.0
Total	30	100.0	100.0	

FORT SASKATCHEWAN CONSUMER SURVEY - PART-TIME RESIDENT

D4. HOUSEHOLD YEARLY INCOME

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid \$15,000-\$24,999	1	3.3	3.3	3.3
\$45,000-\$54,999	1	3.3	3.3	6.7
\$55,000-\$64,999	3	10.0	10.0	16.7
\$65,000-\$74,999	4	13.3	13.3	30.0
\$75,000-\$99,999	4	13.3	13.3	43.3
\$100,000-\$124,999	8	26.7	26.7	70.0
\$125,000+	9	30.0	30.0	100.0
Total	30	100.0	100.0	

D5. RESPONDENT GENDER

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid MALE	28	93.3	93.3	93.3
FEMALE	2	6.7	6.7	100.0
Total	30	100.0	100.0	



Engaged People



Thriving Community

CITY OF FORT SASKATCHEWAN ALBERTA

Prepared By:

**CUSHING
TERRELL**
ARCHITECTURE INC.