JUNE 2019

RETAIL MARKET & GAP ANALYSIS

City of Grande Prairie

PREPARED FOR

PREPARED BY

key planning strategies

RESOURCEFUL SPIRIT, GROWING OPPORTUNITY

RETAIL
Market & Gap Analysis

City of Grande Prairie
Alberta

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Member of
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Prairie Mall, Grande Prairie. Photo: Morguard

PREFACE

Key Planning Strategies ("Key Planning") was commissioned by the City of Grande Prairie in December 2018 to conduct a Retail Market and Gap Analysis for the City's retail sector. This study provides an update to previous studies conducted in 2014 and 2016.

The study was carried out over the period December 2018 to April 2019.

The objective of this study is to update and document in detail the City of Grande Prairie'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, also known as surplus/ leakage.

Retail spending (i.e. Demand) and the City's retail inventory and its corresponding productivity (i.e. Supply) was supported by a detailed Consumer Intercept Survey conducted by Keyfax Market Research in March 2019 to further identify gaps in Grande Prairie's current provision of shops and services.

This document is intended to assist the City of Grande Prairie in its ongoing Business Retention, Expansion and Attraction (BREA) strategy, promoting the community, working with developers and investors, and providing an overall identity/positioning strategy for future developments which could feature retail throughout the City's various retail nodes and districts.

Reference material for this report was obtained from, but not limited to The City of Grande Prairie, Commercial Real Estate Brokerage Firms, Conference Board of Canada, Grande Prairie Chamber of Commerce, Local Commercial Developers, International Council of Shopping Centers Key Planning Strategies.

Key Planning does not warrant that any estimates contained within the study will be achieved over the identified time horizons, nor can they account for future economic uncertainties, 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 Grande Prairie, but rather that they could represent compatible "target" retailers.

This analysis was conducted by Key Planning as an objective and independent party, and is not an agent of the City.

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 Key Planning or the City of Grande Prairie

Key Planning Strategies - April 2019

EXECUTIVE SUMMARY

INTRODUCTION

The objective of this study is to document in detail the City of Grande Prairie'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

As a strategic regional hub for retail and industrial trade and commerce, Grande Prairie has established itself as a lucrative market for local and multi-national retailers.

The City of Grande Prairie continues to have the pillars and contextual assets for a successful regional retail market.

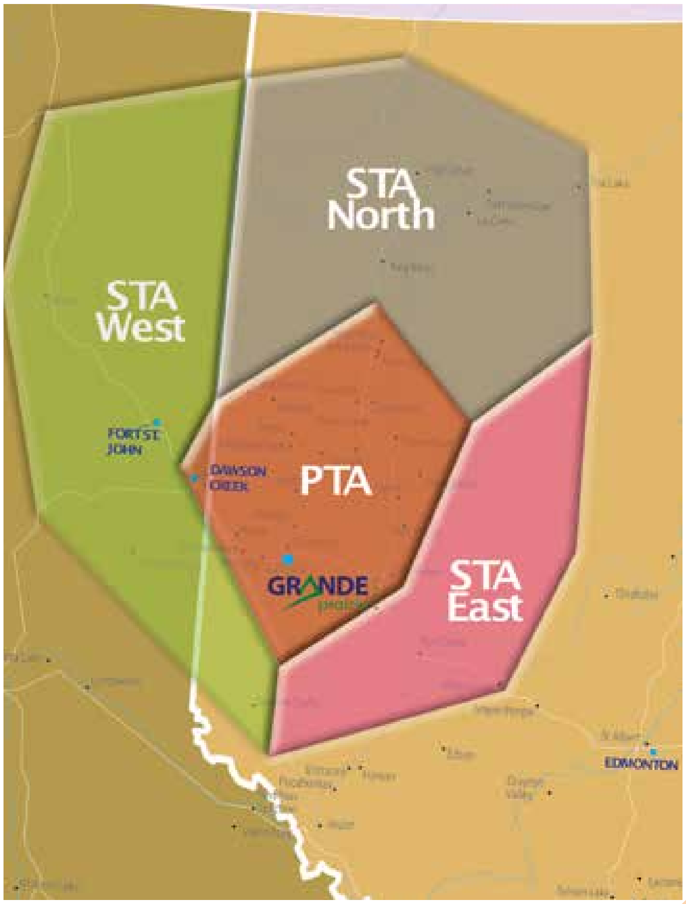
Not only is the city located at the centre of the wider region, the major highway infrastructure and transportation network (including air) converges in and travels through the City.

Traffic counts at major retail nodes continue to grow and are now in excess of 25,000 to 30,000 vehicles, allowing for high visibility and accessibility for retail nodes. Similarly, local arterials in newer neighbourhoods are also exhibiting increasing traffic counts averaging more than 10,000 vehicles per day.

The City of Grande Prairie itself has a diversified economy at the heart of which beats the retail industry as well as expansion and modernization at all three forestry mills. It is this diversification that is allowing the City an opportunity to still thrive despite a weakened Provincial economy.

With numerous 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-scale to regional larger and destination type formats.

Mobility to and within the City of Grande Prairie and the various new residential communities being developed in the South, East and Northeast is strong, allowing for retailers to set up businesses in all sectors of the City including Downtown.

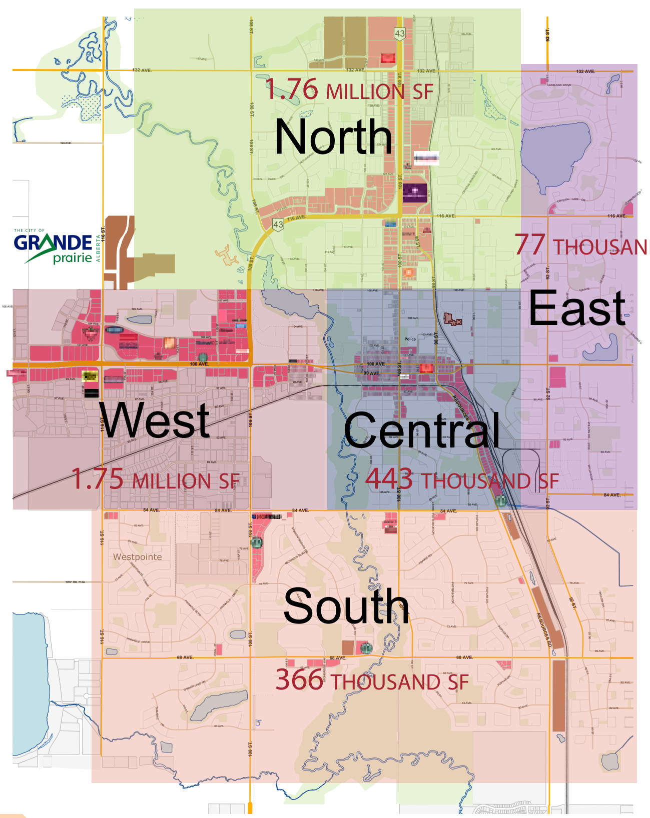


EXECUTIVE SUMMARY

RETAIL TRADE AREA SUMMARY

The Total Trade Area penetrates approximately 290,000 residents, which is forecast to grow by a further 34,000 over the next decade. The Primary Trade Area alone has over 171,000 residents including the City of Grande Prairie, and will be the focal point for future population growth. The Total Trade Area within an approximate 2 hour drive time has a retail spending catchment estimated at $4.7 Billion in 2018.

Most significant is the fact that the City of Grande Prairie is the shopping and service centrality for this large populace and spending catchment.



RETAIL SUPPLY SUMMARY

The overall retail inventory for the City of Grande Prairie is best classified as a progressive and aspirational retail environment in which there are opportunities for small to large and local to national tenants.

The current city retail inventory, which is quantified and estimated on a category-by-category and sector-by-sector basis to be just 4.4 million sf, would not in isolation be supported by the City of Grande Prairie residents alone.

This suggests and confirms that Grande Prairie is more than just a remote local market, but that many other factors must be at play to rationalize and justify the amount of space in the City.

The City is the beneficiary of a location that is far enough from the City of Edmonton and close enough to urban centres in Northeastern British Columbia that it can provide the shops and services for a wide area.

Moreover, the City has numerous retail development opportunities ranging from large format Power Centres, to a well-managed, strong performing and recently renovated Regional Enclosed Mall (Prairie Mall), to new Community Shopping Centres and Neighbourhood Centres and to traditional Downtown shops and services. Each of these formats provides a range of potential opportunities for retailers and investors in terms of store sizes, categories etc.

The evolution of Grande Prairie's retail market over the past decade has become more evident in the increasing quality of retail spaces available to tenants.

The resulting inventory and relatively low vacancy in the City of Grande Prairie validates the regional serving nature of the retail offering.

EXECUTIVE SUMMARY

RETAIL DEMAND SUMMARY

Total demand for retail floorspace in the City of Grande Prairie attributable to Primary and Secondary Trade Area residents is estimated at approximately 5.42 million sf.

When compared against the current estimated retail inventory or supply at 4.4 million sf (including vacant space), the difference between demand and supply equates to almost 1.02 million sf of residual retail demand that could be supported in the City of Grande Prairie.

Unlike most markets in which outflow is clearly evident, in the case of Grande Prairie the regional nature of the market is substantiated by the magnitude of inflow and retention of spending, whereby only a few retail categories indicate potential outflow.

The City of Grande Prairie has a net inflow of Retail Sales in the magnitude of $446 million.

CONSUMER SURVEY SUMMARY

The Consumer Intercept Survey yielded findings that validated the identified Trade Area as well as the strength of Grande Prairie as a regional serving hub for northwestern Alberta and northeastern British Columbia.

The respondents interviewed in the process confirmed previous anecdotal statements regarding tenants that are desired in the community such as Red Lobster, Olive Garden, Indigo Books, Sport Chek and Montana's BBQ & Grill..

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

The types of tenants sought by respondents combined with their spending patterns suggests that current major locations in the city can fulfill retailer site location requirements particularly in the West and North Sectors.

Prairie Mall is well-established and supported, and continues to step up its game. It is in an excellent position to attract progressive, trendy tenants for whom an enclosed mall is desired (e.g. H&M, Uniqlo, Sport Chek) while at the same time competing with the evolving comparison merchandise offering at Westgate.

The downtown area, will no doubt continue to face external pressures resulting from continued growth on the fringe of the City, but growth along Resources Road is taking shape and providing local community scale opportunities Downtown is still recognized as an important node that can accommodate future local specialty tenant opportunities.

The most significant appeal of Grande Prairie's Retail Market is the large and proven trade area penetration as well as the strength and spending propensity of the high earning and fast growing young family segment (<55 years).

CONCLUSION

The analysis yielded the following salient facts about Grande Prairie's Retail Market:

FACT - City of Grande Prairie serves a Total Trade Area of almost 288,500 residents.

FACT - City of Grande Prairie's Trade Area extends into Northeastern British Columbia and Northwest Territories.

FACT - City of Grande Prairie's Primary Trade Area has over 171,000 residents.

FACT - City of Grande Prairie could support over 5.4 million sf of retail floorspace.

FACT - City of Grande Prairie has new retail developments ranging in size and scale from Neighbourhood to Regional.

FACT - City of Grande Prairie has a high income, young family demographic.

FACT - City of Grande Prairie has a net INFLOW of $446 million in Retail Sales.

FACT - City of Grande Prairies sales attraction and retention results in only $106.6 million in categories that exhibit retail sales OUTFLOW (including auto).

FACT - City of Grande Prairie has a current residual demand for 1.02 million sf of retail space.

FACT - City of Grande Prairie could have demand for an additional 1.02 million sf of new retail space by 2028.

FACT - Consumer Survey Respondents want Full-Service Restaurants, Clothing & Footwear, Sporting Goods & Toys and Entertainment at value to mid price points.

FACT - Residents want more than any other retailers Red Lobster, Olive Garden, Indigo Books, Sport Chek, Montana's BBQ & Grill

FACT - Target audience for retailers are the middle to upper-middle income households comprised of 18 to 55 year olds.

Downtown Grande Prairie. Photo: Key Planning Strategies

1 INTRODUCTION

1.1 REPORT STRUCTURE

Key Planning Strategies conducted on-the-ground research in December 2018 to supplement and update previous research conducted in 2013 and 2015 for existing and future retail conditions in the City of Grande Prairie. The purpose of this research was to establish a solid foundation and basis for determining the depth of retail opportunity and associate gaps in the market provision of shops and services.

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 Grande Prairie as a location in which 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 spending profiles generated from within these respective trade areas, against which estimates of floorspace demand can be attributed.

Section 4 - Retail Market Supply:
Assesses the location and characteristics of Grande Prairie'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 sector, retailer and merchandise category.

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 gauge 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 in which the residents of Grande Prairie 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 Grande Prairie, including 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 spending within the community.

Section 7 – Conclusion:
Highlights and summarizes the key Market Analysis Findings as well as the missing merchandise categories and identify a roster of retailers whose typical site selection criteria match the Trade Area demographics and locational attributes of Grande Prairie.

Westgate Centre, Grande Prairie. Photo: Key Planning Strategies

1.2
SOURCES OF INFORMATION

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

In addition to 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 Grande Prairie Municipal Census 2018.
- City of Grande Prairie Growth Study Update, November 2013.
- City of Grande Prairie Municipal Development Plan.
- City of Grande Prairie Land Use Bylaw.
- City of Grande Prairie 2019 Vacant Lands.
- City of Grande Prairie Traffic Counts.
- Alberta Ministry of Transportation, Highways 1 to 986 Traffic Volume 2018.
- Population Projection -Alberta and Census Divisions, 2018 - 2046
- Manifold Data Mining Inc, Demographic and Spending Data 2018.
- Statistics Canada.
- Conference Board of Canada 2018.
- Keyfax Market Research Consumer Intercept Survey, March 2019.
- Key Planning Strategies and Cushing Terrell Architecture Inc. Detailed Retail Inventory Fieldwork, originally conducted December 2013 and February 2016, and updated in-person December 2018.

Key Planning Strategies 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:

- Morguard
- Wexford Developments
- ONE Properties
- International Council of Shopping Centers
- Conference Board of Canada
- Prudential Land
- KCM Commercial
- Royal Lepage Grande Prairie
- Avison Young

2 LOCATION & CONTEXT

2.1 INTRODUCTION

Strong locational factors are an essential foundation to retail success, and an understanding of these factors can help to create the necessary conditions for attracting and retaining retail businesses in a community. This section identifies the City of Grande Prairie'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 Grande Prairie regional context whereby the market it serves extends well beyond the City's political boundaries and, as will be demonstrated in this study, extends into northeast British Columbia and as far north as the southern parts of the Northwest Territories.

2.2 REGIONAL CONTEXT

The City of Grande Prairie is approximately 450 km northwest of Edmonton and is the most populated city between Edmonton and Anchorage, Alaska. As the largest city in northwestern Alberta, Grande Prairie is well positioned to access markets across northern Alberta, British Columbia as well as the Yukon and Northwest Territories.

Highways 40 and 43, and CN rail connect Grande Prairie to major markets and ports across North America, which provides a strong network for goods movement 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 over 280,000 people spanning northwestern Alberta, northeastern British Columbia and the Northwest Territories.

As a strategic regional hub for retail and industrial trade and commerce, Grande Prairie has established itself as a lucrative market for local and multi-national retailers. Notable examples include Costco, Bed Bath & Beyond, and Bouclair, with others soon-to-enter or actively looking at opportunities throughout the City.

Furthermore, because the City of Edmonton is approximately a 4 1/2 to 5 hr drive-time from Grande Prairie, the market has a greater need to be self-sufficient than other markets that may fall within a 2 to 3 hr drive time from a major market such as Edmonton or Calgary.

While there are destination tenants that will still only locate in the major metropolitans, the distance from Edmonton combined with the significant regional penetration that Grande Prairie achieves, suggests that for many retailers the market could represent an untapped opportunity.

2.3 MUNICIPAL DEVELOPMENT PLAN

The City of Grande Prairie's Municipal Development Plan (MDP) includes a specific section that addresses the vision for "Commercial Development". As is stated in the MDP, and further validated by fieldwork, the downtown area and former shopping malls, not including Prairie Mall, have become marginalized by the emergence of power centres over the past decade, particularly in the west side of the City.

Hence an essential and necessary criteria of the MDP is the acknowledgment that downtown must still play a critical role in response to new competitive forces in the City. The City has embarked recently on a major initiative to revitalize and strengthen the Downtown Core as a vibrant city centre where people can live, work and play.

Figure 2.1

CITY OF GRANDE REGIONAL CONTEXT MAP

(Source: City of Grande Prairie Municipal Development Plan)

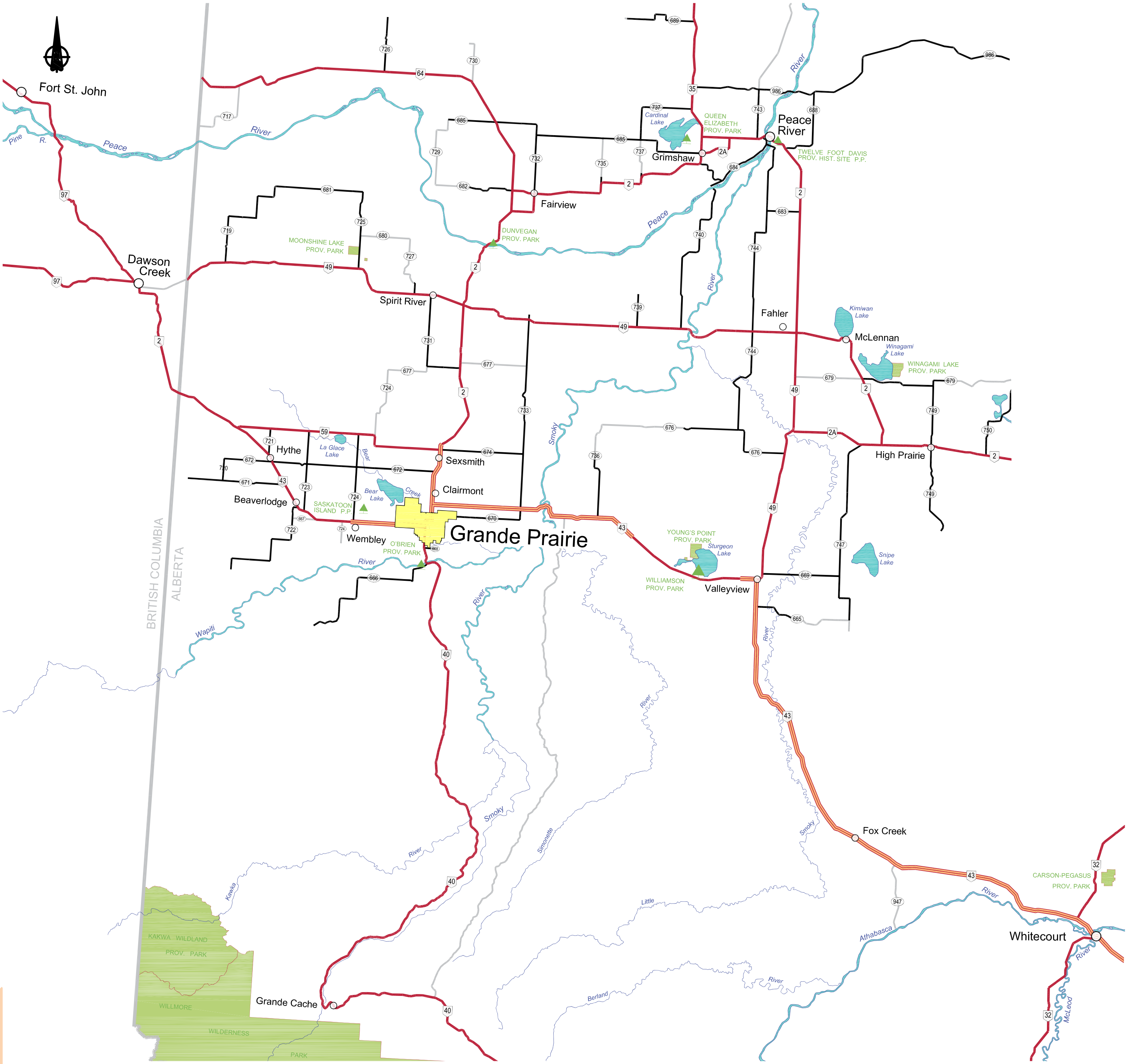


Figure 2.2

CITY OF GRANDE PRAIRIE VACANT LAND USE MAP

(Source: City of Grande Prairie Open Data 2019)

This revitalization includes a Downtown Incentives Program that provides Urban Residential Development Grants, Facade Improvement Grants and Patio Grants.

Although the downtown may not be the first destination of choice for new retailers, the role of the downtown is nonetheless critical to providing and incubating opportunities for local retailers and entrepreneurs: the renewed energy towards revitalization will be a catalyst for creating opportunities for local and branded businesses.

The goal of the MDP states:

To support a diverse commercial sector that serves both local and regional residents.

The outlined objectives in the MDP reiterate the balance that the City is seeking to attain as it relates to preserving and revitalizing the downtown, while recognizing that certain tenants, trends and development types may be looking for other alternatives:

1. *To support the commercial role of the downtown.*
2. *To recognize emerging trends in retailing and commercial land use, including the creation of mixed-use intensification nodes.*
3. *To provide commercial development opportunities that support a complete range of commercial services.*

2.4 VACANT LAND USE CONTEXT

Figure 2.2 shows vacant lands in the City. The areas shown in green depict vacant land currently zoned for Commercial Land Uses, while those shown in blue represent Industrially zoned lands. The map illustrates concentrations of Commercial lands at which major future commercial development will be situated in the west side of the City along 100th Avenue as well as north along 100th and in the Railtown District along Resources Road.

In addition, the Vacant Land Use Map also highlights areas in emerging residential neighbourhoods such as Summerside in the southeast, Copperwood in the northeast, Grande Banks/Stonebridge in the south and Arbour Hills in the north. These areas are planned to accommodate neighbourhood/convenience scale commercial development.

Vacant land use represents one aspect of commercial development; the MDP also promotes the intensification of lands where parcels and/or properties in the downtown have become areas for potential consolidation and redevelopment.

The correlation between current vacant land to existing and future patterns of commercial development will be documented in the detailed analysis of the City's current and future retail supply (**Section 4.0)**.

2.5 TRANSPORTATION CONTEXT

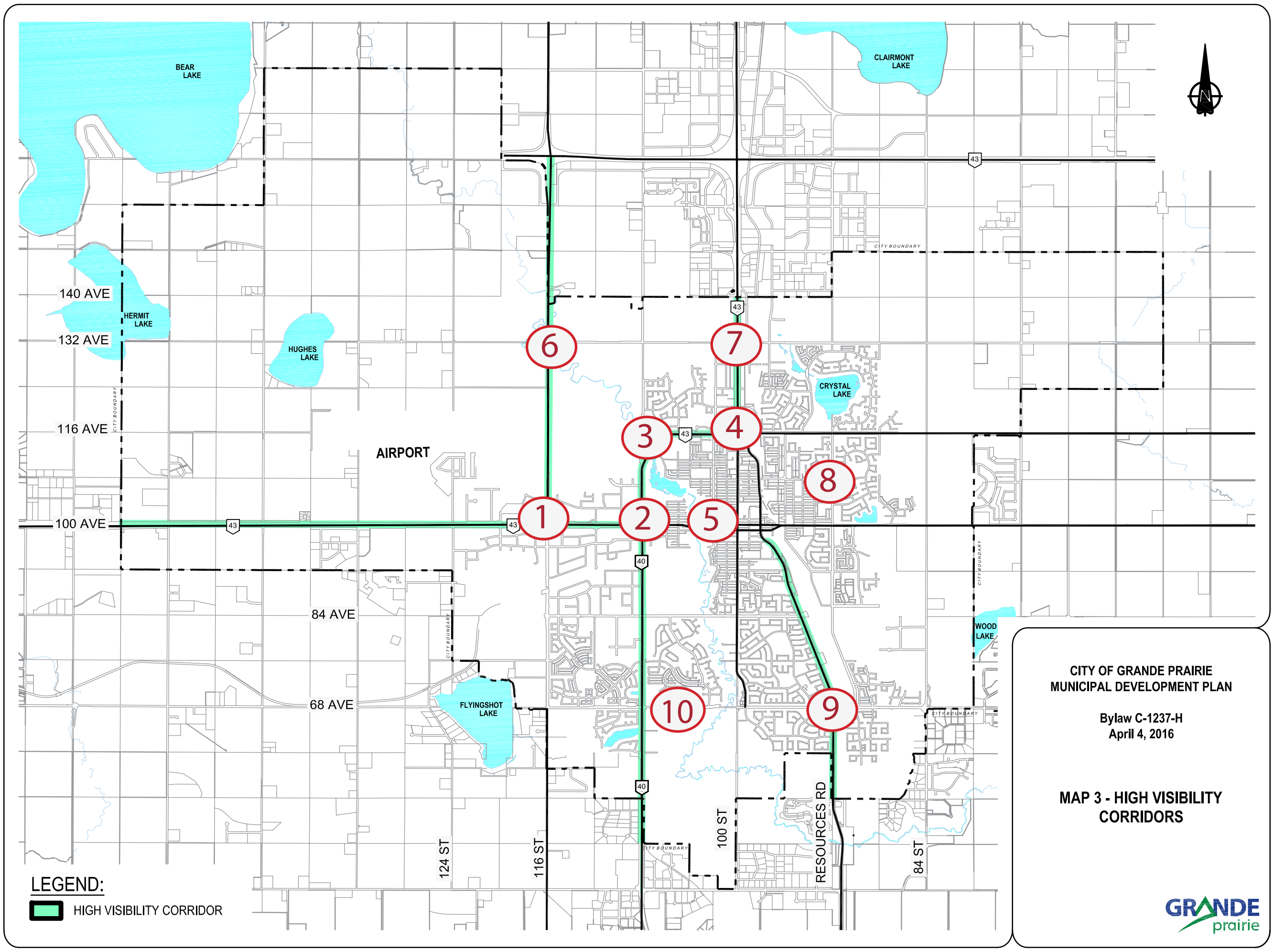
One of the most significant determinants to successful commercial development relates to patterns of transportation. The ability to be accessible as well as visible to high volumes of traffic is a major consideration for retail businesses. For a regional market such as Grande Prairie that attracts a significant portion of its retail patrons from outside of the city, a retail location relative to strong and accessible transportation patterns is very important.

Accordingly, **Figure 2.3** reveals the major high volume traffic corridors in the city, which are located at: (#1) 100th Ave (Hwy 43 East/West), (#2) 108th Street (Hwy 40 North/South), (#3) 100th Street (Hwy 43 North/South) and (#7) Resources Road (North/South).

Figure 2.3

CITY OF GRANDE PRAIRIE HIGH VOLUME TRAFFIC CORRIDORS

(Source: City of Grande Prairie and Alberta Ministry of Transportation)



Both the City of Grande Prairie and the Alberta Ministry of Transportation undertake traffic counts at various years and points within the City.

The Alberta Ministry of Transportation provides traffic counts on the major highways, which for Grande Prairie include Hwy 40 and 43. Referring to **Figure 2.3**, the most recent 2017 traffic counts by the Province illustrated Average Annual Daily Traffic (AADT) at the following intersections:

1) 100th Ave (Hwy 43) at 116th St.)

West on Hwy 43 = 16,880
North on Hwy 43 = 13,580
East on 100th Ave = 16,890
South on Hwy 40 = 17,990

2) 100th Ave (Hwy 43) at 108th St. (Hwy 40)

West on Hwy 43 = 26,200
North on Hwy 43 = 24,550
East on 100th Ave = 24,200
South on Hwy 40 = 24,590

3) Hwy 43 at 108th St.

West on Hwy 43 = 31,350
North on 108th St = 4,610
East on Hwy 43 = 27,080
South on 108th St = 3,380

4) Hwy 43 (116th Ave) at 100th St. (Hwy 43)

West on Hwy 43 = 21,780
North on Hwy 43 = 32,570
East on 116th Ave = 18,060
South on 100th St = 17,810

Similarly, the City of Grande Prairie undertakes traffic counts throughout the City. Some of the most recent available counts for the high volume traffic corridors shown in **Figure 2.3** include (year of data in parentheses):

5) 100th Ave at 105th St. Downtown (2017)

West on 100th Ave = 26,034
North on 105th St = 2,447
East on 100th Ave = 27,843
South on 105th St = 3,059

6) 132nd Ave at 116th St. (2016)

West on 132nd Ave = 1,978
North on 116th St = 15,811
East on 132nd Ave = 1,497
South on 116th St = 15,345

7) Hwy 43 at 132nd St. (2017)

West on 132nd Ave = 8,530
North on Hwy 43 = 24,840
East on 132nd Ave = 5,760
South on Hwy 43 = 24,310

8) 106th Ave at 92nd St. (2011)

West on 106th Ave = 5,551
North on 92nd St = 19,812
East on 106th Ave = 5,394
South on 92nd St = 20,052

9) 68th Ave at Resources Road (2009)

West on 68th Ave = 11,877
North on Resources Rd = 14,099
East on 68th Ave = 12,527
South on Resources Rd = 9,226

10) 68th Ave at Stoneridge (2015)

West on 68th Ave = 19,255
North on Stoneridge = 3,835
East on 68th Ave = 22,095
South on Stoneridge = 376

The patterns of traffic counts closely mirror the retail hot spots as well as vacant land use, particularly in the West and North areas where the largest concentrations of traffic flow are in the range of 20,000 - 30,000 AADT and for which regional traffic is an important consideration for larger Regional and power centre type uses.

In other areas where the traffic counts are in the range of 10,000 - 15,000 AADT, a correlation with community-scale shops and services exists. As residential growth continues in the south, east and soon in the northwest, smaller retail development opportunities are likely to be warranted.

Traffic counts near the downtown illustrate a pattern of traffic flow east and west that is around 25,000 vehicles per day which is strong despite having a pattern of one way streets, which is not truly conducive for successful streetfront retail in a downtown environment.

2.6 BUILDING PERMIT DATA

A review of data on building permits in the City of Grande Prairie over the 5-year period 2013 to year end 2018 illustrates a sustained pattern of development activity, though the current economic climate has led to a downturn in overall building permit activity.

Over the period 2013 to 2018, the City of Grande Prairie continued to exhibit strength and resiliency as evidenced by an average of over 1,113 annual building permits issued for all types of construction (**Figure 2.4**).

Referring to 2019 data, of the 1,197 permits issued, 19% were for residential development (85% single family vs. 15% multi-family), while 2% of permits were for new commercial buildings.

Figure 2.4

CITY OF GRANDE PRAIRIE BUILDING PERMITS 2013 - 2018

(Source: City of Grande Prairie 2019)

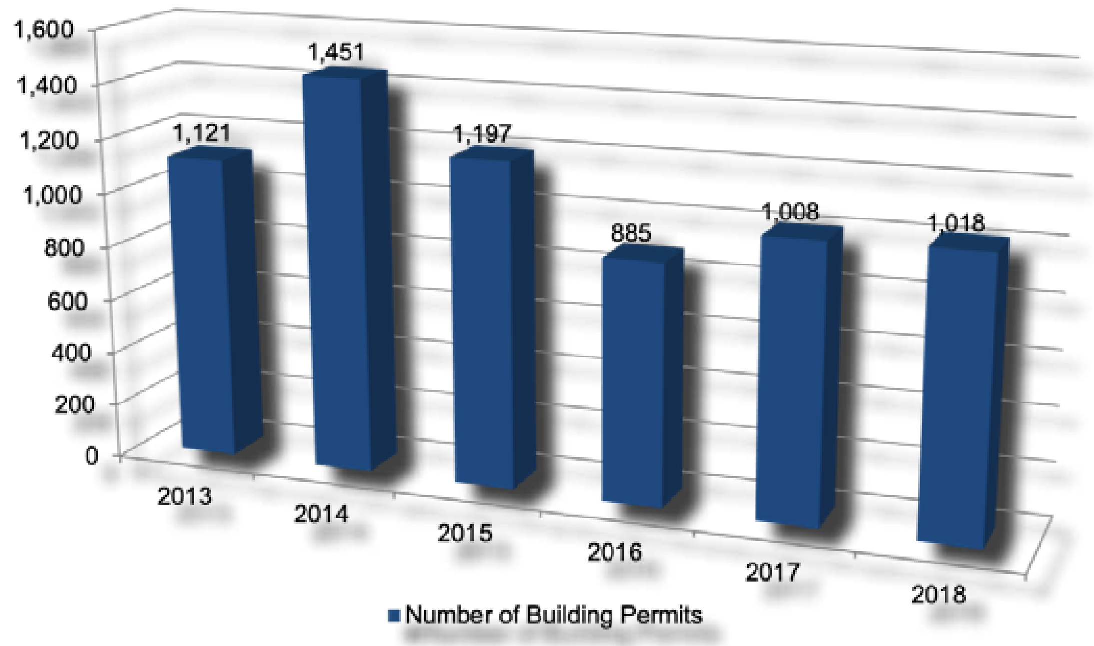
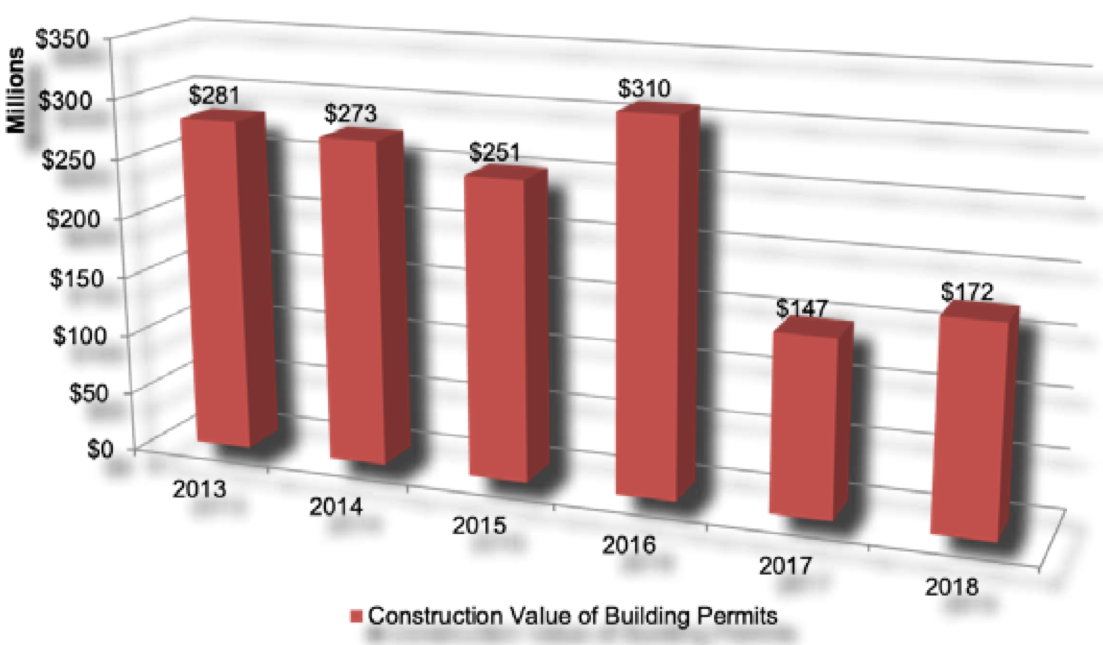


Figure 2.5

CITY OF GRANDE PRAIRIE TOTAL BUILDING PERMITS CONSTRUCTION VALUE 2013 - 2018

(Source: City of Grande Prairie 2019)



The value of the Building Permits issued has averaged $239 million over the period 2013 to year end 2018. 2018 was a rebound year, whereby there was a $25 million increase over permit values in 2017.

Residential building permits have cooled over the past 5-years in the City of Grande Prairie, but still average over 340 permits per year over the period 2013 to 2018. Single family housing is still the most preferred format for residents and those looking for homes in Grande Prairie./

The importance of residential to retail development is significant, particularly for the development and feasibility of additional local or community scale developments in emerging neighbourhoods like Stonebridge, Summerside, Woodgrove etc.

Given the current economic situation in the Province, building permit data still indicates a degree of resiliency in the Grande Prairie market overall. It also illustrates a trend towards a more 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 long term revitalization.

2.7 SUMMARY & IMPLICATIONS

The City of Grande Prairie continues to have the pillars and contextual assets for a successful regional retail market.

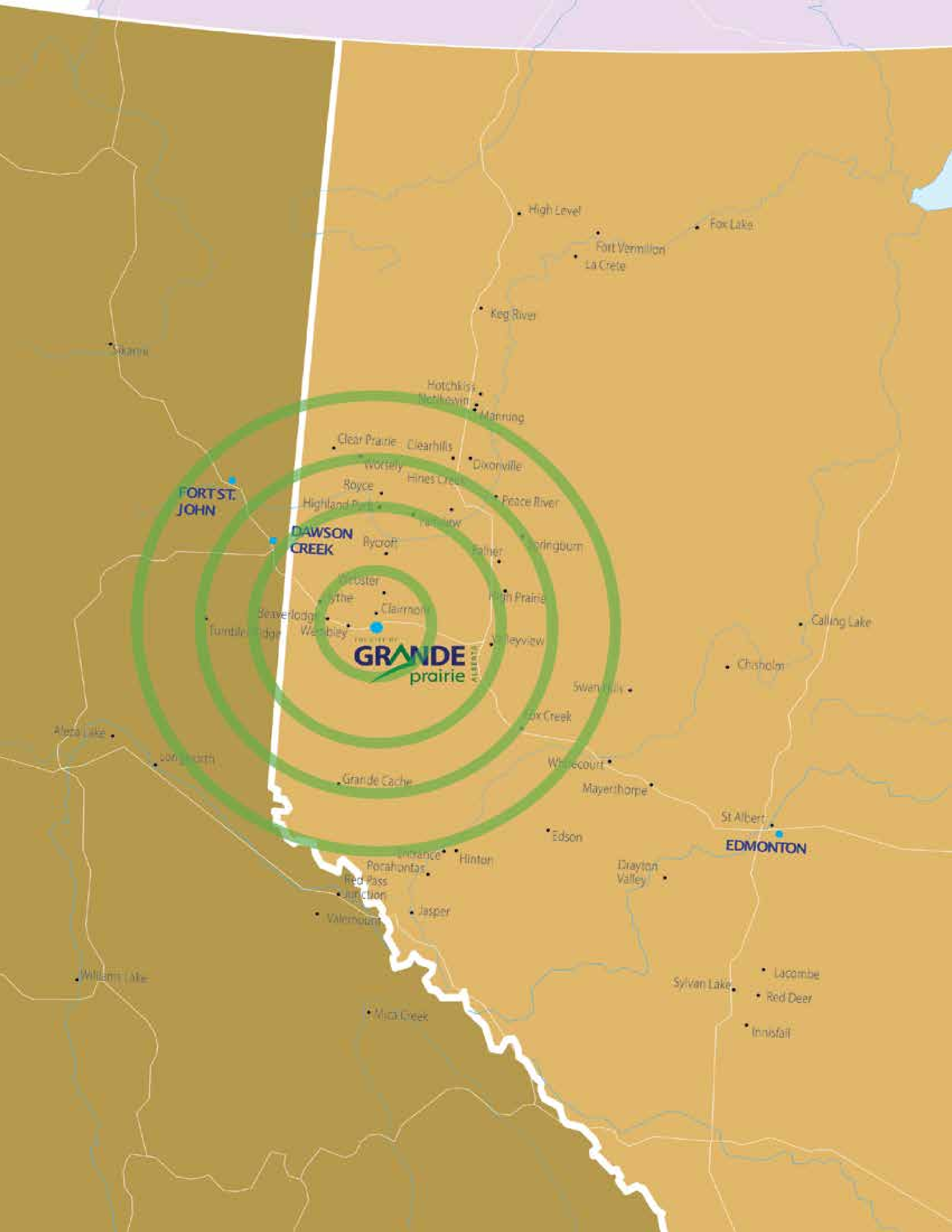
Not only is the city located at the centre of the wider region, the major highway infrastructure and transportation network (including air) converges in and travels through the City.

Traffic counts at major retail nodes continue to grow and are now in excess of 25,000 to 30,000 vehicles, allowing for high visibility and accessibility for retail nodes. Similarly, local arterials in newer neighbourhoods are also exhibiting increasing traffic counts averaging more than 10,000 vehicles per day.

The City of Grande Prairie itself has a diversified economy at the heart of which beats the retail industry as well as expansion and modernization at all three forestry mills. It is this diversification that is allowing the City an opportunity to still thrive despite a weakened Provincial economy.

With numerous 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-scale to larger regional and destination type formats.

Mobility to and within the City of Grande Prairie and the various new residential communities being developed in the South, East and Northeast is strong, allowing for retailers to set up businesses in all sectors of the City including Downtown.


High Level
Fox Lake
Fort Vermilion
La Crete
Keg River
Hotchkiss
Manning
Clear Prairie
Clearhills
Worsley
Dixonville
Royce
Peace River
FORT ST. JOHN
DAWSON CREEK
Rycroft
Falher
Clairmont
Beaverlodge
Wembley
High Prairie
Valleyview
GRANDE prairie
ALBERTA
Calling Lake
Chisholm
Fox Creek
Whitecourt
Mayerthorpe
Grande Cache
St Albert
EDMONTON
Edson
Hinton
Pocahontas
Drayton Valley
Jasper
Aleza Lake
Sylvan Lake
Lacombe
Red Deer
Innisfail
Mica Creek

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,which is that area from which the City of Grande Prairie's retail sales are most frequently and likely to be sourced and generated by local and regional residents.

The Trade Area recognizes drive times and profiles the demographics and spending attributes, which collectively help to shape and inform the market to prospective tenant, developer, and investor interests, ultimately providing 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 Grande Prairie 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. Growth and development vision, including an understanding of area characteristics and potential target 'audience';

iv. Local and regional competitive environment, present and future;

v. Proposed land uses (retail, cultural, civic, etc.) and their relationship within the wider market;

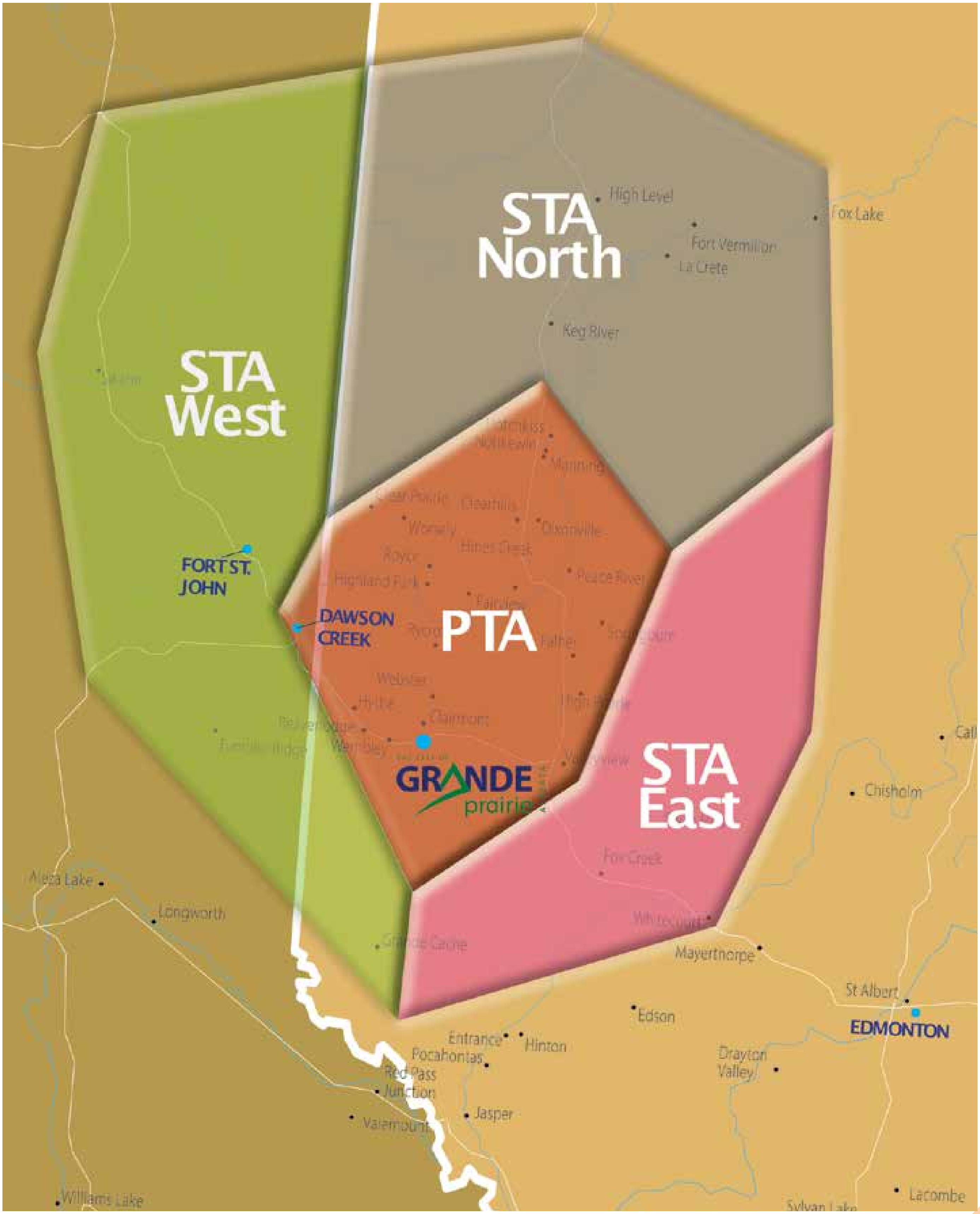
vi. Significant natural and man-made barriers (e.g. water features, highways and industrial areas);

vii. De facto barriers resulting from notable socioeconomic differentiation;

viii. Patterns of existing and future residential and commercial development.

ix. Economic realities, such as provincial retail sales taxes.

Figure 3.1
CITY OF GRANDE PRAIRIE RETAIL TRADE AREA



Identifying the likely Trade Area is important for 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 compatible, the amount of retail floorspace supportable in the market and the current inflow or outflow of retail sales and to which categories such inflow or outflow is attributed.

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 (PTA) from which the majority of retail sales originate, and a series of Secondary Trade Areas (STAs), 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 further validated by a Consumer Intercept Survey (**Section 6.0**). This Consumer Intercept Survey used postal codes of shoppers in the City to inform, confirm and modify the Trade Area.

Also, this study had the added benefit of using patron postal code data for the annual events at Revolution Place, which were mapped in **Figures 3.2 and 3.3** to further validate the extent of Grande Prairie's market depth and breadth.

The resulting Trade Area for the City of Grande Prairie comprises the following Primary and Secondary Trade Areas:

Primary Trade Area (PTA) includes the City of Grande Prairie, County of Grande Prairie, as well as Dawson Creek to the west, Valleyview to the East, Hotchkiss to the north and almost to Grande Cache in the south. The PTA's core areas however are the most populated cities of Dawson Creek for whom Grande Prairie represents a strong service centre, without a Provincial Sales Tax.

Secondary Trade Area West (STA West) includes the Peace River region of Northeastern British Columbia and most notably the cities of Fort St. John, Tumbler Ridge, Hudson's Hope and Silkanni. Although Fort Nelson is not in Grande Prairie's STA, this does not presuppose that residents from Fort Nelson will also visit Grande Prairie, but that this patronage will be less frequent than for other STA West residents.

Secondary Trade Area North (STA North) includes towns along Hwy 34 running north such as Keg River, Upper Hay River, High Level and Steen River. The STA North also includes towns along Hwy 88 and the Peace River, most notably Fort and North Vermillion. As with the STA West, patronage is also sourced to regions in the southern part of the Northwest Territories, though patronage will not be as frequent as for others in the STA North.

Secondary Trade Area East (STA East) is represented by a smaller geographic area and only extends as far east to include Whitecourt. It is reasonably expected that residents in the STA East will have a comparable drive time to either Grande Prairie or Edmonton for their shops and services, and therefore the region is likely to not support the patronage that the City's other trade areas will.

Figure 3.2

REVOLUTION PLACE MAJOR EVENT ATTENDEES RESIDENCE OF ORIGIN - HEAT MAP

(Source: Manifold Data Mining 2018, City of Grande Prairie and Key Planning Strategies)

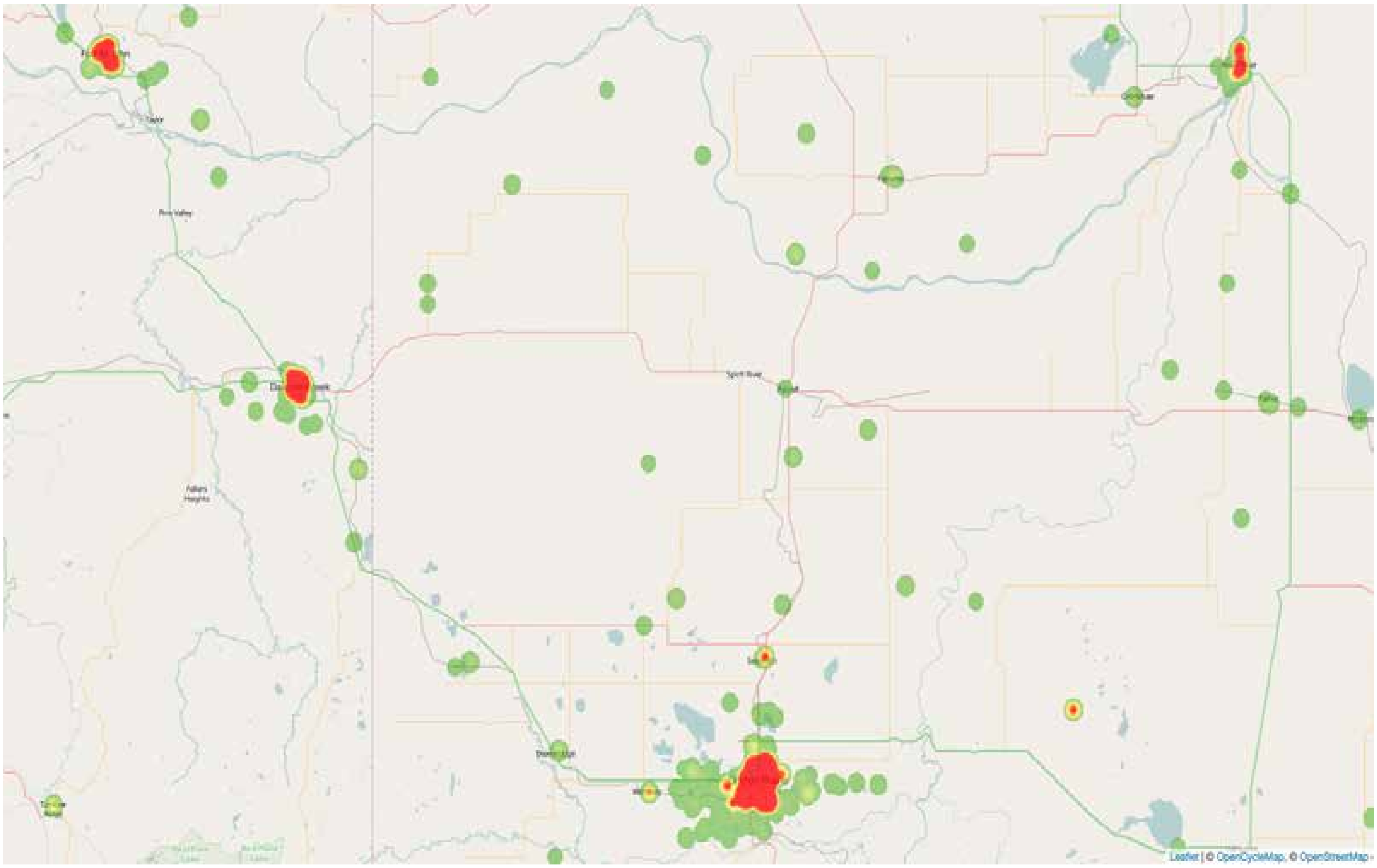


Figure 3.3

REVOLUTION PLACE MAJOR EVENT ATTENDEES RESIDENCE OF ORIGIN - POSTAL CODE COUNTS

(Source: Manifold Data Mining 2018, City of Grande Prairie and Key Planning Strategies)

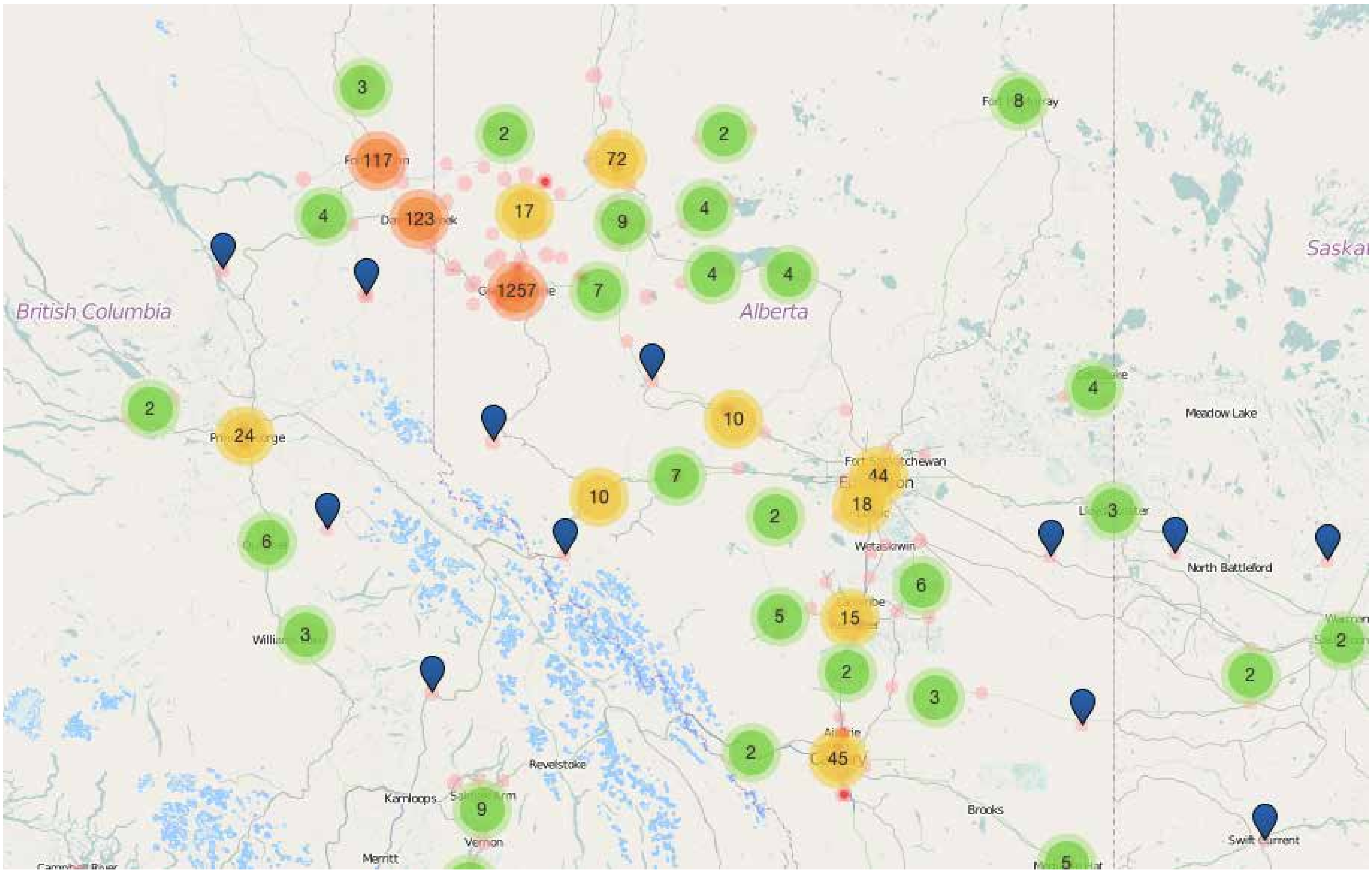


Table 3.1

TRADE AREA POPULATION PROJECTIONS SUMMARY 2018 TO 2028

(Source: Manifold Data Mining 2019)

Attribute	GP - PTA	GP - STA West	GP - STA North	GP - STA East	GP - Total Trade Area	INDEX Benchmark Grande Prairie (CMA/CA,AB	Alberta (PR,AB)
Summary							
SUMMARY							
Total population (year end 2018 estimates)	171,079	60,572	24,311	32,534	288,496	69,092	4,417,880
Total number of private households	62,974	24,145	6,762	11,843	105,724	25,626	1,648,840
Average number of persons in private households	2.60	2.50	3.54	2.69	2.65	2.64	2.62
POPULATION GROWTH							
2018 Total population (year end 2018 estimates)	171,079	60,572	24,311	32,534	288,496	69,092	4,417,880
2023 Total population	187,348	62,823	25,459	33,912	309,542	78,132	4,925,270
2028 Total population	205,481	65,395	26,712	35,423	333,011	87,973	5,490,940
HOUSEHOLD GROWTH							
2018 Total number of households (year end 2018 estimates)	62,974	24,145	6,762	11,843	105,724	25,626	1,648,840
2023 Total number of households	69,552	25,330	6,969	12,458	114,309	28,239	1,807,890
2028 Total number of households	76,842	26,641	7,199	13,125	123,806	30,995	1,982,650
PROJECTIONS							
Annual population growth in the period: 2018 to 2023	1.79%	0.69%	0.90%	0.81%	1.37%	2.46%	2.14%
Annual household growth in the period: 2018 to 2023	1.97%	0.93%	0.57%	0.98%	1.53%	1.94%	1.81%
Annual population growth in the period: 2023 to 2028	1.83%	0.77%	0.94%	0.85%	1.43%	2.38%	2.14%
Annual household growth in the period: 2023 to 2028	1.98%	0.98%	0.62%	1.02%	1.57%	1.86%	1.81%

Figure 3.4

RETAIL TRADE AREA POPULATION GROWTH RATES

(Source: Manifold Data Mining 2019)

288,500

TOTAL TRADE AREA POPULATION

3.2

POPULATION PROJECTIONS

Using data sources that include the City of Grande Prairie, which completed a Municipal Census in 2018, as well as Statistics Canada and Manifold Data Mining Inc., population estimates and growth forecasts were prepared for each of the identified Trade Areas and benchmarked against the City and Provincial average.

Using comprehensive demographic data provided by Manifold Data Mining Inc. allows for full tabulation of data at the block level for more accurate delineations and forecasts. Therefore, for this analysis, using the Manifold Data Mining Inc. projections allows for comparisons across other municipalities and at the Provincial level, for consistency.

It is recognized however that the Province of Alberta does have straight-line projections to the year 2046 for Census Divisions including Grande Prairie, but these cannot be correlated with the specificity of the trade areas used in this study.

In the Provincial forecasts, the following observations is made; ***"CD 19, which includes the City of Grande Prairie, has experienced robust growth over the last decade. At 1.5%, the region's average annual growth (between 2017 and 2046) is expected to remain slightly above the provincial average over the long term."*** Forecasts by Data Mining Inc. are about 0.9% per annum higher than those estimated over the 2017 to 2046 period by the Province, but regardless each illustrates a scenario of growth that is healthy and strong for the Grande Prairie region.

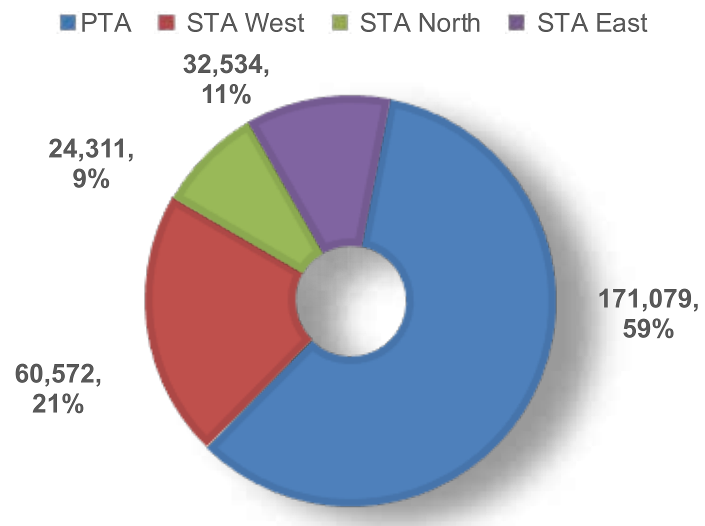
Table 3.1 provides a breakdown of the Trade Area population in which the Primary Trade Area is shown to include and exclude the City of Grande Prairie. The purpose of this inclusion/exclusion was to allow for the City of Grande Prairie to be isolated as its own demographic subset, thereby allowing for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

Referring to **Table 3.1**, the Total Trade Area population is estimated at over 288,500 as of year end 2018.

Figure 3.5

RETAIL TRADE AREA POPULATION BREAKDOWN

(Source: Manifold Data Mining 2019)



171,000

PRIMARY TRADE AREA POPULATION 2018

Within the Total Trade Area, the Total Primary Trade Area, which includes the City of Grande Prairie, is estimated to be over 171,000 (59% of Total Trade Area as shown in Figure 3.5) and is forecast to grow by over 34,000 by 2028.

Thus, it can be seen that the Trade Area's future population growth (**Figure 3.4**) will be driven by the Primary Trade Area, and most of that will be in the City of Grande Prairie or nearby Clairmont in the County of Grande Prairie.

The City of Grande Prairie, on its own has a 2016 population estimated at now over 69,000 (69,088 Municipal Census mid year 2018, now estimated at 69,092 for year end 2018).

Over the Statistics Canada Census period 2011 to 2016, the City of Grande Prairie grew by 11,323 residents from 57,233 to 68,556, an average annual growth rate of 3.7%.

Forecasts provided by Manifold Data Mining Inc. suggest that the City's population could reach just under 88,000 by 2028, at a slightly decelerated, yet robust average annual rate of approximately 2.4%.

Figure 3.4 illustrates the strong and dominant growth forecasts for the City of Grande Prairie compared to the other retail Trade Areas, as well as compared to the Provincial forecasts.

Continued growth in the City of Grande Prairie, which represents the nucleus of the PTA, suggests ongoing support for specific types of retail shops and services over the next 5 years, though perhaps less aggressively than the past 5 year cycle, since many desired brands have located in the city. Also, the strong sales retention has the potential to manifest in stronger productivity for existing well-positioned and marketed businesses.

Grande Prairie was impacted by low oil prices, and saw net outflows of migrants between 2016 and 2017. However, because of its economic diversity and the up-tick in conventional drilling, Grande Prairie should see its migration levels recover faster than other oil-dependent regions in the province.

32.3

MEDIAN AGE IN CITY OF GRANDE PRAIRIE

(37.4 ALBERTA MEDIAN)

3.3
AGE PROFILE

A summary of the current age profile, as documented in **Table 3.2 & Figure 3.6** reveals a growing younger age demographic comprised of families and young adults entering their higher income earning years, with a median age of 32.3 years in the City of Grande Prairie and 34.6 in the Total Trade Area.

Compared to the Provincial average of 37.4, Grande Prairie's youthful profile suggests a requisite mix of retail shops and services that matches the market profile, as further supported by the Consumer Intercept Survey Findings (**Section 6.0**).

Table 3.2 reveals that 27% of the Primary Trade Area's population is currently under the age of 20, while 31% are between the ages of 25 to 44. The latter age cohort represents the family building stage as well as the higher 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.

Accordingly, with almost 52,400 of the Primary Trade Area population in the 25 to 44 year old age bracket, retail 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 remain healthy.

While projects such as Westgate, Gateway and Prairie Mall continue to position/reposition 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, as well as the role that e-commerce can have on their purchasing patterns.

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. Some retail nodes will not compete with larger retail centres with branded tenats, 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 or projects such as South 40, Cobblestone Lane, Grande Banks, Stone Ridge etc.

Restaurants, both family-casual and upper mid-scale are also well-served in being closer to residential areas.

In a market such as Grande Prairie, which has climate extremes, the role of the Prairie Mall is very critical and as it relates to the age profile. Mall Management continues to be proactive in providing adaptable and high quality spaces for tenants that see value in the market and its trade area and for whom an enclosed shopping centre format is preferred. Trendy brands such as Uniqlo, H&M and Muji are good examples of tenants that may look at Grande Prairie, but only within the Prairie Mall.

Table 3.2

TRADE AREA POPULATION AGE BREAKDOWN

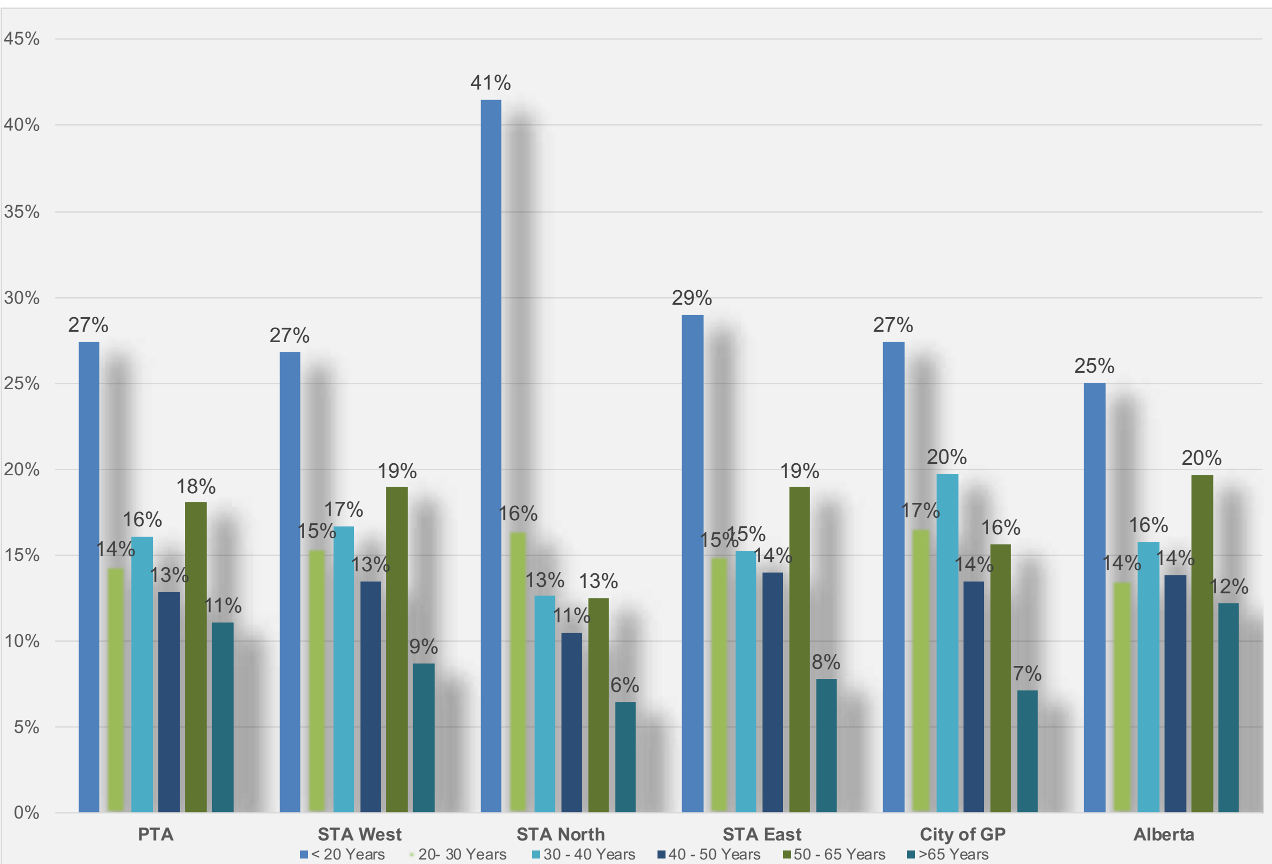
(Source: Manifold Data Mining 2019)

Attribute	GP - PTA	GP - STA West	GP - STA North	GP - STA East	GP - Total Trade Area	INDEX Benchmark Grande Prairie (CMA/CA,AB	Alberta (PR,AB)
Summary							
Population							
POPULATION AGE GROUP							
Total population by age groups	171,079	60,572	24,311	32,534	288,495	69,092	4,417,880
0-4	12,131	4,062	2,437	2,374	21,003	5,466	282,892
5-9	12,559	4,443	2,925	2,506	22,433	5,148	291,358
10-14	11,601	4,082	2,545	2,354	20,581	4,372	275,388
15-19	10,653	3,659	2,175	2,197	18,683	3,932	255,182
20-24	11,317	4,156	2,076	2,306	19,855	4,899	275,453
25-29	13,329	5,174	1,920	2,552	22,976	6,580	321,944
30-34	14,197	5,352	1,633	2,551	23,732	7,221	351,054
35-39	13,310	4,743	1,434	2,424	21,912	6,433	346,365
40-44	11,517	4,165	1,319	2,296	19,296	5,091	313,071
45-49	10,560	3,989	1,234	2,259	18,042	4,236	297,226
50-54	10,777	4,010	1,173	2,238	18,199	3,965	297,563
55-59	10,901	4,105	1,060	2,167	18,233	3,814	305,090
60-64	9,221	3,364	806	1,761	15,152	3,002	266,253
65-69	6,139	1,924	508	1,052	9,623	1,632	178,398
70-74	4,545	1,327	428	708	7,008	1,119	133,349
75-79	3,300	839	309	416	4,864	780	90,115
80-84	2,409	604	183	213	3,409	613	64,710
85 and over	2,613	574	145	161	3,493	791	72,467
Median age of total population	35.90	35.10	25.20	34.20	34.60	32.30	37.40
Average age of total population	36.40	35.70	29.20	34.80	35.50	34.00	38.00

Figure 3.6

TRADE AREA POPULATION AGE BREAKDOWN

(Source: Manifold Data Mining 2019)



42%

PERCENTAGE OF CITY'S HOUSEHOLDS EARNING OVER $125,000 PER YEAR (37% ALBERTA AVERAGE)

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 3.7** reveals an average Household Income in 2018 estimated at over $131,300 in the City of Grande Prairie, which is slightly below the Provincial average ($138,300). The overall Trade Area average household income is estimated at just under $122,900.

Table 3.3 also reveals that Household Income in the City of Grande Prairie is forecast to grow at an average annual rate of 4.7% per annum over the next decade, which is slightly higher than the Provincial forecast of 4.3% per annum. This growth though is subject to an improving Provincial economy.

Figure 3.7 shows a valuable trend whereby 42% of the households in the City earn over $125,000, which is 5% higher than the Provincial average.

With average household sizes in the Trade Area ranging from 2.6 to 2.7 and a young demographic, the income profile further supports a market that continues to be the benefactor of healthy levels of discretionary spending on retail shops and services.

Higher incomes often 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 3.3

TRADE AREA AVERAGE HOUSEHOLD INCOME BREAKDOWN

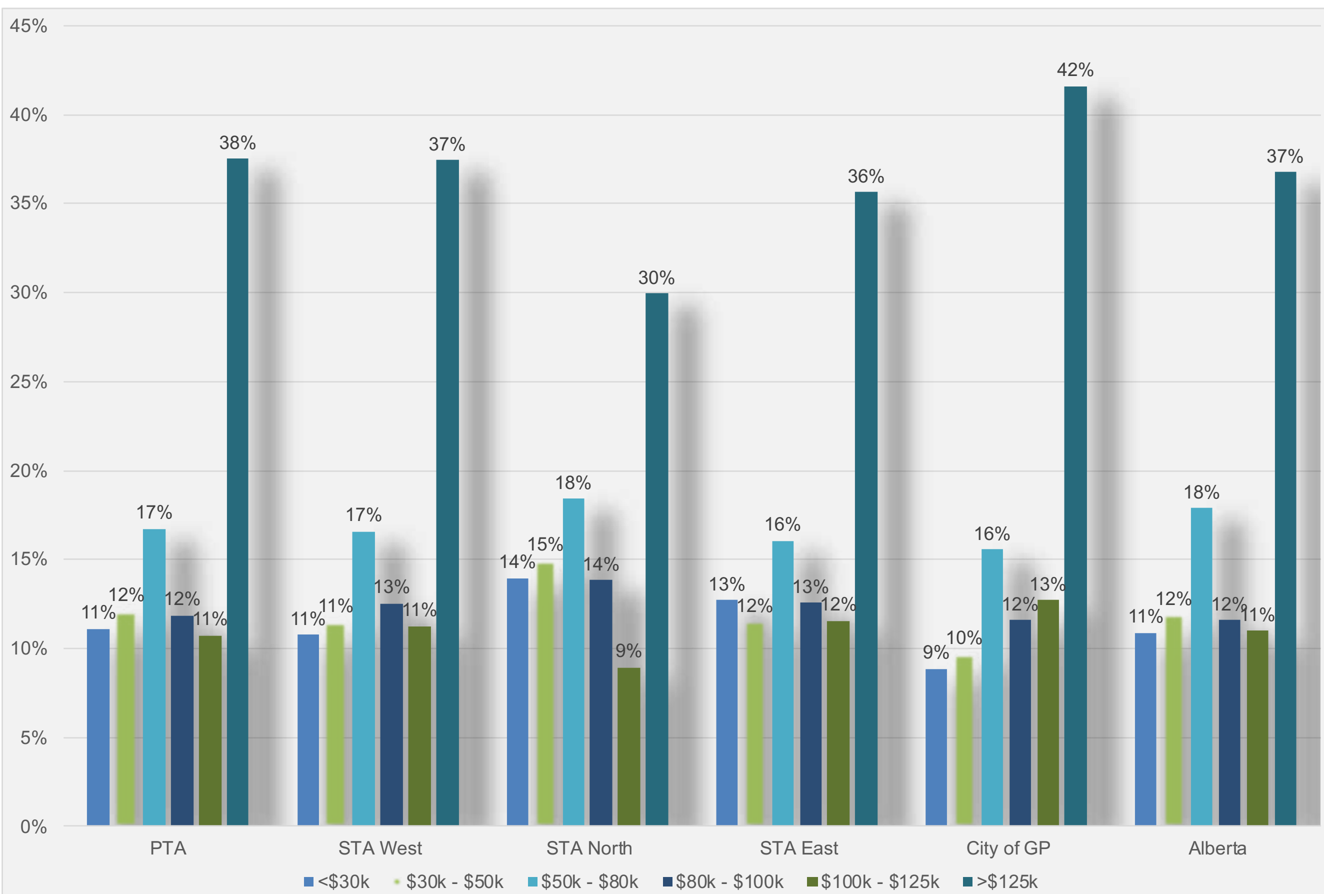
(Source: Manifold Data Mining 2019)

Attribute	GP - PTA	GP - STA West	GP - STA North	GP - STA East	GP - Total Trade Area	INDEX Benchmark Grande Prairie (CMA/CA,AB	Alberta (PR,AB)
Household Income							
HOUSEHOLD INCOME							
All private households with income	62,974	24,145	6,762	11,843	105,724	25,626	1,648,870
Under $5,000	485	247	106	182	1,020	192	18,327
$5,000 to $9,999	576	205	116	169	1,065	240	16,204
$10,000 to $14,999	788	328	116	188	1,420	214	18,833
$15,000 to $19,999	1,330	507	172	250	2,259	434	31,829
$20,000 to $24,999	2,075	627	213	364	3,279	649	50,103
$25,000 to $29,999	1,731	681	222	352	2,986	544	43,884
$30,000 to $34,999	1,825	686	234	317	3,062	570	45,417
$35,000 to $39,999	1,853	623	275	328	3,078	601	49,349
$40,000 to $44,999	1,952	715	259	343	3,269	662	50,300
$45,000 to $49,999	1,981	747	242	376	3,345	649	51,294
$50,000 to $59,999	3,117	1,214	361	612	5,303	1,210	92,709
$60,000 to $69,999	3,677	1,329	428	599	6,034	1,355	102,016
$70,000 to $79,999	3,726	1,452	456	688	6,323	1,420	100,261
$80,000 to $89,999	3,708	1,562	451	715	6,436	1,418	97,037
$90,000 to $99,999	3,764	1,464	485	774	6,487	1,552	94,143
$100,000 to $124,999	6,766	2,721	603	1,368	11,458	3,256	181,089
$125,000 to $149,999	6,659	2,663	585	1,284	11,190	3,177	162,519
$150,000 to $199,999	7,808	3,080	582	1,347	12,817	3,833	192,519
$200,000 and over	9,152	3,294	857	1,589	14,892	3,650	251,038
Average household income $	$125,716	$121,887	$105,305	$120,449	$122,946	$131,259	$138,393
Median household income $	$105,605	$106,221	$89,623	$103,628	$104,502	$116,185	$102,378

Figure 3.7

TRADE AREA AVERAGE HOUSEHOLD INCOME BREAKDOWN

(Source: Manifold Data Mining 2019)



$4.7 Billion

TOTAL TRADE AREA RETAIL SPENDING IN 2018

3.5

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 Grande Prairie. 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 retail[1] (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 on retail spending within the Trade Area was collected from Manifold Data Mining Inc. data which was collected at a detailed micro-geographic scale for census dissemination areas. This data was then aggregated to each respective Trade Area in order to build a spending profile, that is in turn specific to each respective Trade Area.

Each of the major three categories of spending (Convenience, Comparison[1] and Leisure) was assessed at a detailed category-by-category level then aggregated into the major categories.

The initial task involved developing an understanding of how each of the delineated Trade Area residents spend their shopping and leisure dollars at a household level for each of the merchandise/spending categories prepared by Key Planning Strategies. Once this Trade Area shopping "profile" was established, the data was aggregated by population to quantify the size of the Trade Area retail market.

The result is a Total Trade Area for the City of Grande Prairie estimated at $4.7 Billion (including Auto and Auto Parts) in retail spending for year end 2018 (refer to **Table 3.4)**.

What is most compelling about the Trade Area spending (**Figure 3.8**) is that the City of Grande Prairie's residents only account for 24% of that total spending catchment. This suggests a significant market potential within a 2-hour drive time which retailers have proven an ability to tap into.

The **combined** spending of the Primary Trade Area, which includes the City of Grande Prairie and extends into Dawson Creek in British Columbia, shown in **Figure 3.9,** further supports and illustrates just how strong a catchment Grande Prairie's PTA represents. This catchment is confirmed by the Survey Respondents' origin of residence as well as patron origin of residence at the City's Revolution Place events centre.

Retail spending on Comparison Merchandise[1] (DSTM) 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.

[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.

Table 3.4

TRADE AREA RETAIL SPENDING

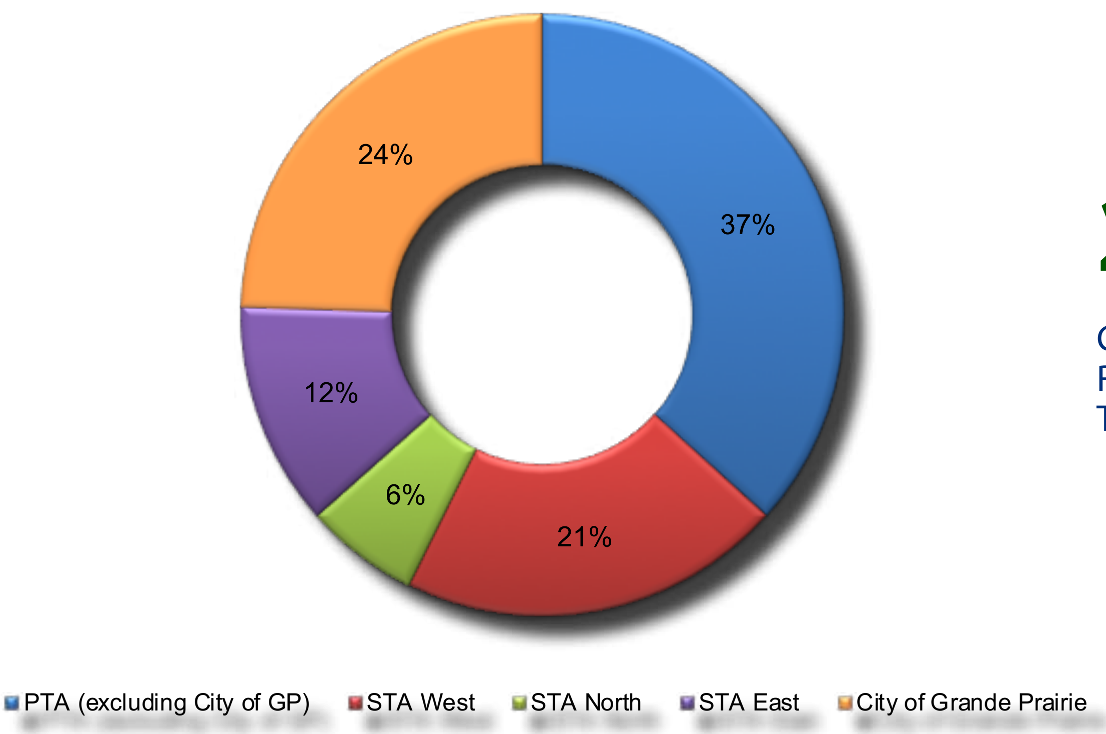
(Source: Manifold Data Mining 2019 and Key Planning Strategies)

Retail Spending by Merchandise Category	2018 (Year End Estimate) Primary Trade Area Aggregate Retail Spending	PTA Including Grande Prairie Aggregate Retail Spending	STA West Aggregate Retail Spending	STA North Trade Area Aggregate Retail Spending	STA East Aggregate Retail Spending	City of Grande Prairie Aggregate Retail Spending	TOTAL Trade Area Aggregate Retail Spending
Grocery & Specialty Foods	$444,631,351	$710,641,650	$258,920,361	$71,487,829	$136,877,328	$266,010,299	$1,177,927,168
Pharmacy	$38,828,256	$58,717,860	$17,378,172	$3,888,206	$9,301,056	$19,889,604	$89,285,294
Alcohol & Tobacco	$60,449,137	$102,464,610	$30,243,780	$9,343,803	$19,662,336	$42,015,473	$161,714,529
Personal Services	$65,894,460	$106,936,500	$41,093,136	$10,729,565	$20,240,640	$41,042,040	$178,999,841
Clothing & Apparel	$94,257,508	$162,608,290	$51,558,444	$16,407,153	$30,577,824	$68,350,782	$261,151,711
Footwear	$32,485,861	$56,190,270	$18,050,256	$5,684,315	$10,554,048	$23,704,409	$90,478,889
Jewelry & Accessories	$18,094,187	$31,432,850	$10,321,290	$3,128,055	$5,807,136	$13,338,663	$50,689,331
Health & Beauty	$35,743,045	$60,078,870	$20,522,565	$6,390,650	$11,794,992	$24,335,825	$98,787,077
Home Furniture & Décor	$56,733,791	$97,539,050	$33,820,227	$9,128,539	$17,505,744	$40,805,259	$157,993,560
Home Electronics & Appliances	$188,780,670	$317,957,860	$109,573,695	$33,009,389	$61,023,120	$129,177,190	$521,564,064
Home Improvement & Gardening	$64,215,174	$102,205,370	$38,620,827	$9,908,871	$19,493,664	$37,990,196	$170,228,732
Books & Media	$48,177,587	$87,299,070	$24,099,012	$9,680,153	$17,505,744	$39,121,483	$138,583,979
Sporting Goods	$14,845,986	$26,053,620	$9,289,161	$2,744,616	$4,614,384	$11,207,634	$42,701,781
Toys & Hobbies	$14,305,688	$23,461,220	$9,049,131	$2,589,895	$4,746,912	$9,155,532	$39,847,158
Specialty Retail	$28,780,138	$45,302,190	$18,938,367	$4,204,375	$8,192,640	$16,522,052	$76,637,572
Quick Service F&B	$18,455,454	$30,136,650	$11,809,476	$2,374,631	$5,493,888	$11,681,196	$49,814,645
Full Service Restaurants	$109,300,488	$181,597,620	$72,009,000	$17,026,037	$33,891,024	$72,297,132	$304,523,681
Arts & Entertainment	$46,679,895	$76,540,610	$25,731,216	$7,776,412	$14,626,272	$29,860,715	$124,674,510
Drinking Establishments	$11,043,370	$18,146,800	$9,385,173	$1,439,578	$3,036,096	$7,103,430	$32,007,647
Fitness & Leisure	$22,534,635	$37,136,130	$15,481,935	$3,235,687	$6,746,880	$14,601,495	$62,600,632
Auto Parts & Accessories	$28,772,439	$48,477,880	$12,481,560	$5,038,523	$9,554,064	$19,705,441	$75,552,027
Auto/RV/Motorsports Dealerships	$296,197,183	$515,693,170	$151,458,930	$50,587,040	$105,480,240	$219,495,987	$823,219,380
TOTAL RETAIL CATEGORIES ONLY	**$1,739,206,303**	**$2,896,618,140**	**$989,835,714**	**$285,803,322**	**$556,726,032**	**$1,157,411,837**	**$4,728,983,208**

Figure 3.8

TRADE AREA RETAIL SPENDING SUMMARY

(Source: Manifold Data Mining 2019 and Key Planning Strategies)



24%

CITY OF GRANDE PRAIRIE RESIDENTS' SHARE OF TOTAL TRADE AREA SPENDING

Figure 3.9

TRADE AREA RETAIL SPENDING SUMMARY 2018

(Source: Manifold Data Mining 2019 and Key Planning Strategies)

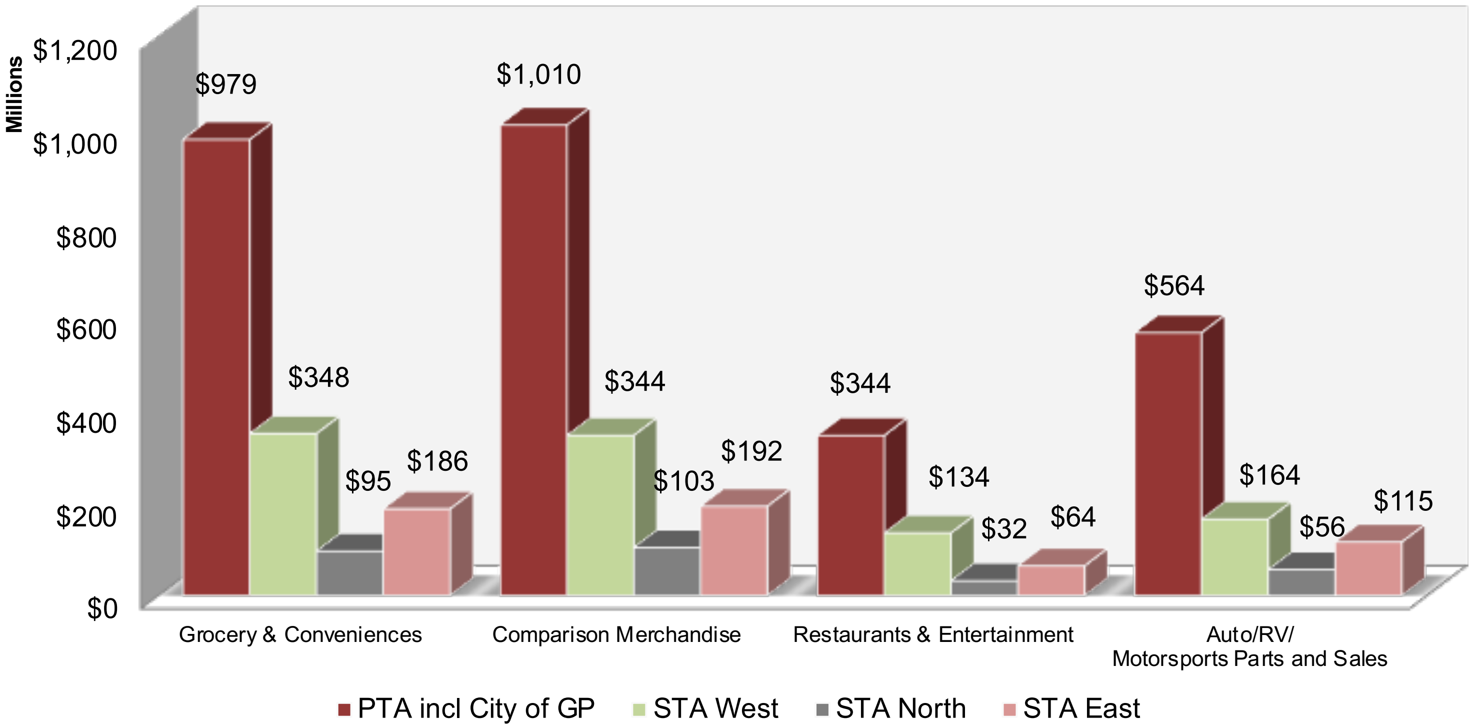
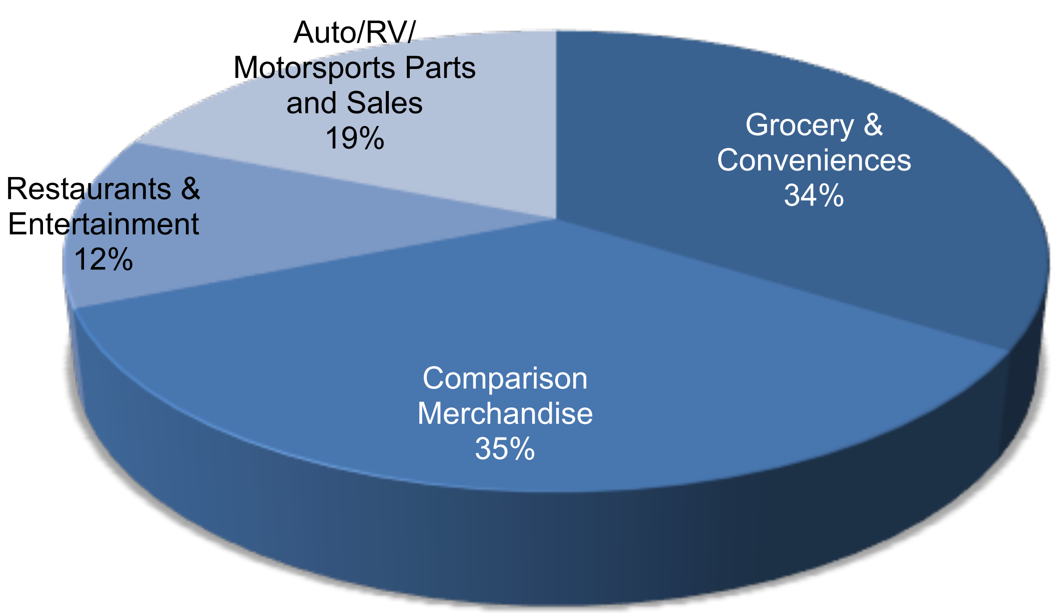


Figure 3.10

TRADE AREA RETAIL SPENDING BY GENERAL CATEGORY

(Source: Manifold Data Mining 2019 and Key Planning Strategies)



COSTCO Grande Prairie including weekday afternoon parking lot out-of province license plates.
Photo: Key Planning Strategies

Moreover, healthy patterns of spending on Comparison Merchandise, such Clothing, Footwear, Jewelry, House & Home, Computers & Electronics etc. provide a benchmark against which prospective tenant, developer or investor interests could gauge the opportunity.

The top retail spending categories for the **Total Trade Area** are:

1. *Grocery & Specialty Foods - $1.1 Billion*
2. *Auto/RV/Motorsport - $898 Million*
3. *Home Electronics & Appliances - $521 Million*
4. *Food & Beverage - $386 Million*
5. *Clothing, Apparel & Footwear - $351 Million*

Because Grande Prairie is located far enough from its nearest major metropolitan area (Edmonton is a 4 to 5 hour drive), with strong spending attributes and a large trade area catchment, retailers have proven to meet or exceed sales expectations with broad support from customers (e.g. Costco).

3.6 SUMMARY & IMPLICATIONS

The Trade Area Demographic Profile illustrates a burgeoning resident and consumer market within a 2-hour drive time comprised of households with high income earnings and a young family dynamic: an average age of 32.3 years, which is 5 years younger than the Provincial average.

The Total Trade Area penetrates over 288,500 residents within which the Primary Trade Area alone comprises over 171,000 residents.

The latter attributes are extremely positive and favourable for further retail categories and store types in Grande Prairie and in particular have a degree of correlation with expenditure on many merchandise categories.

Grande Prairie's regional centrality relative to Northeastern BC and Northwestern Alberta provides the ideal location for potential retailers to locate, particularly those with destination appeal.

As will be seen in the forthcoming section on Retail Supply, Grande Prairie has a variety of retail formats and locations for retailers ranging from new Power Centres to an established high volume Enclosed Mall to new and revitalized community grocery anchored shopping centres.

Retail spending by City of Grande Prairie residents alone is estimate at over $1.1 Billion, while the Total Trade Area within a 2-hour drive time is estimated at over $4.7 Billion. Most significantly however is the fact that the City of Grande Prairie is the dominant shopping and service destination for a validated large spending catchment.

The City of Grande Prairie's economic diversity, including surrounding counties has enabled the resident base to maintain a healthy economic profile in terms of spending capacity, which continues to bode well for retail opportunities throughout the City.

Prairie Mall Lululemon, Grande Prairie. Photo: Key Planning Strategies

4 RETAIL MARKET SUPPLY

4.1
INTRODUCTION

The dynamics of the overall retail market provides 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 inventory comprising an inventory of the retail centres/nodes and tenants that make up the City of Grande Prairie'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. This evaluation creates a foundation upon which retail "gaps" may be quantified and determined.

The inventory reflects current as well as 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 productivity) followed by identifying the potential types of tenants and/or merchandise categories for whom Grande Prairie would represent a compatible fit.

4.2
GRANDE PRAIRIE RETAIL VACANCY

Prior to documenting the city's retail inventory, an assessment of the retail sector's performance was undertaken to get a sense of the current market vacancies.

Data was obtained through Key Planning's on-site fieldwork conducted in late 2018, which was an update to previous inventories conducted by Cushing Terrell Architecture Inc in 2013 and 2016 respectively.

As of the end of 2018, the City's overall retail vacancy rate was estimated at 9.4%. This includes 2 notably sized vacancies at the former Sears Building and Canadian Tire (which relocated to a new building in Westgate). When excluding these 2 major boxes from the overall total, the vacancy drops by almost half to 5.0%.

Within the remainder of the overall vacancies, most are attributable to older retail space in the Downtown or new retail space actively being leased. For example, the recently repositioned Prairie Mall has approximately 19,123 sf in 13 units of newly re-demised high value tenancies. At the other end of the spectrum is the former Peavey Mart building which remains vacant, but is in an area that may well not be considered viable for retail, thus making this 16,000 sf of vacant space possibly non-retail in its future use.

The overall story of vacancy therefore illustrates that when factoring newly built and actively leased but vacant space, the city's retail vacancy is low, suggesting a relatively healthy and balanced retail market. Since 2016, an estimated 338,000 sf of new space was brought on-stream with only an increase of 2% vacancy overall.

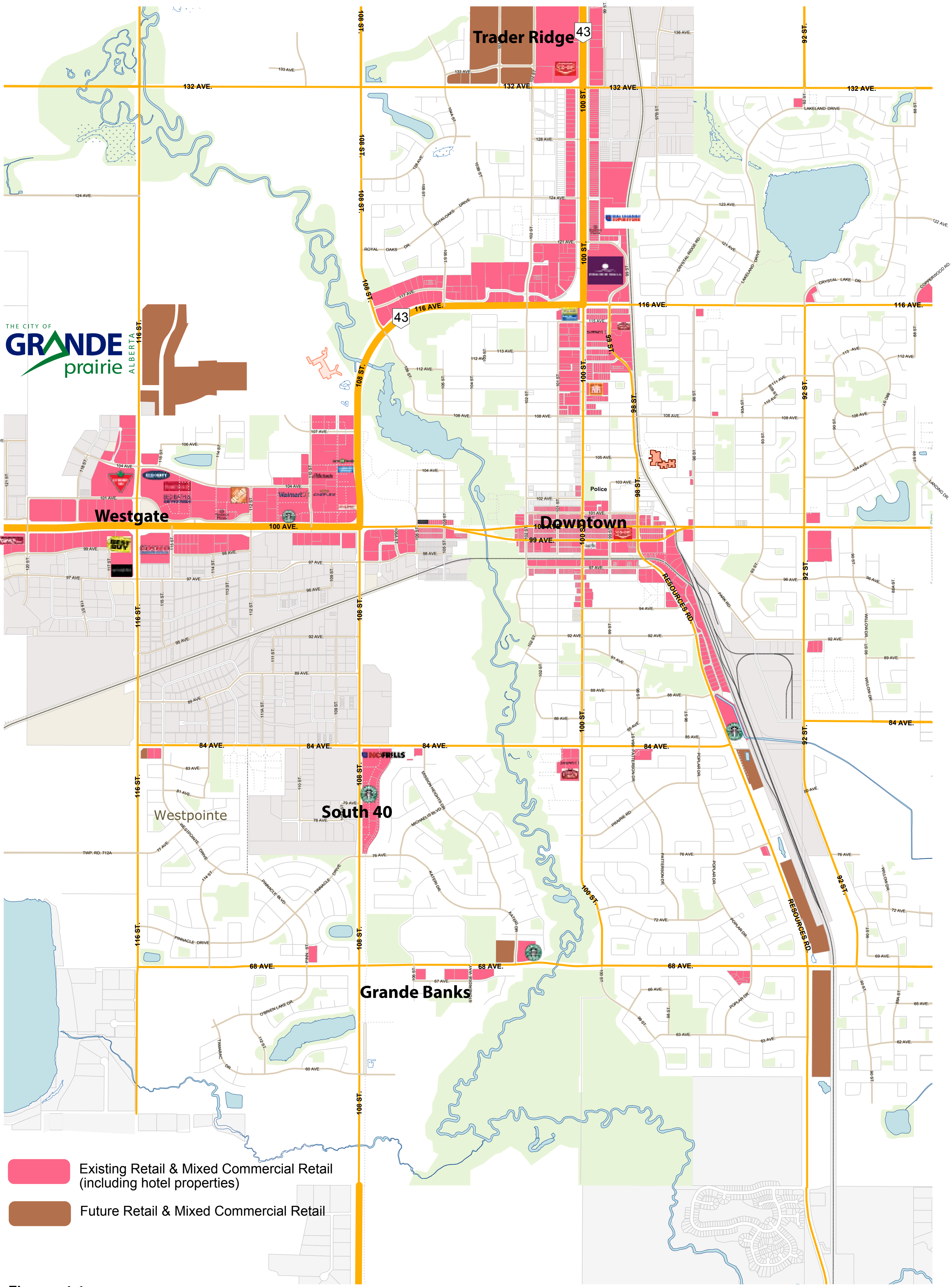


Figure 4.1

CITY OF GRANDE PRAIRIE RETAIL PROJECTS INVENTORY & SUPPLY MAP

(Source: City of Grande Prairie & Key Planning Strategies 2018)

Similarly, the transition from older retail spaces to newer retail spaces typically results in vacancies. This can often be misleading in the sense that much of the space may be obsolete and neither the quality nor location that new-to-market or existing retailers feel comfortable renovating or occupying.

4.3
RETAIL DEVELOPMENTS

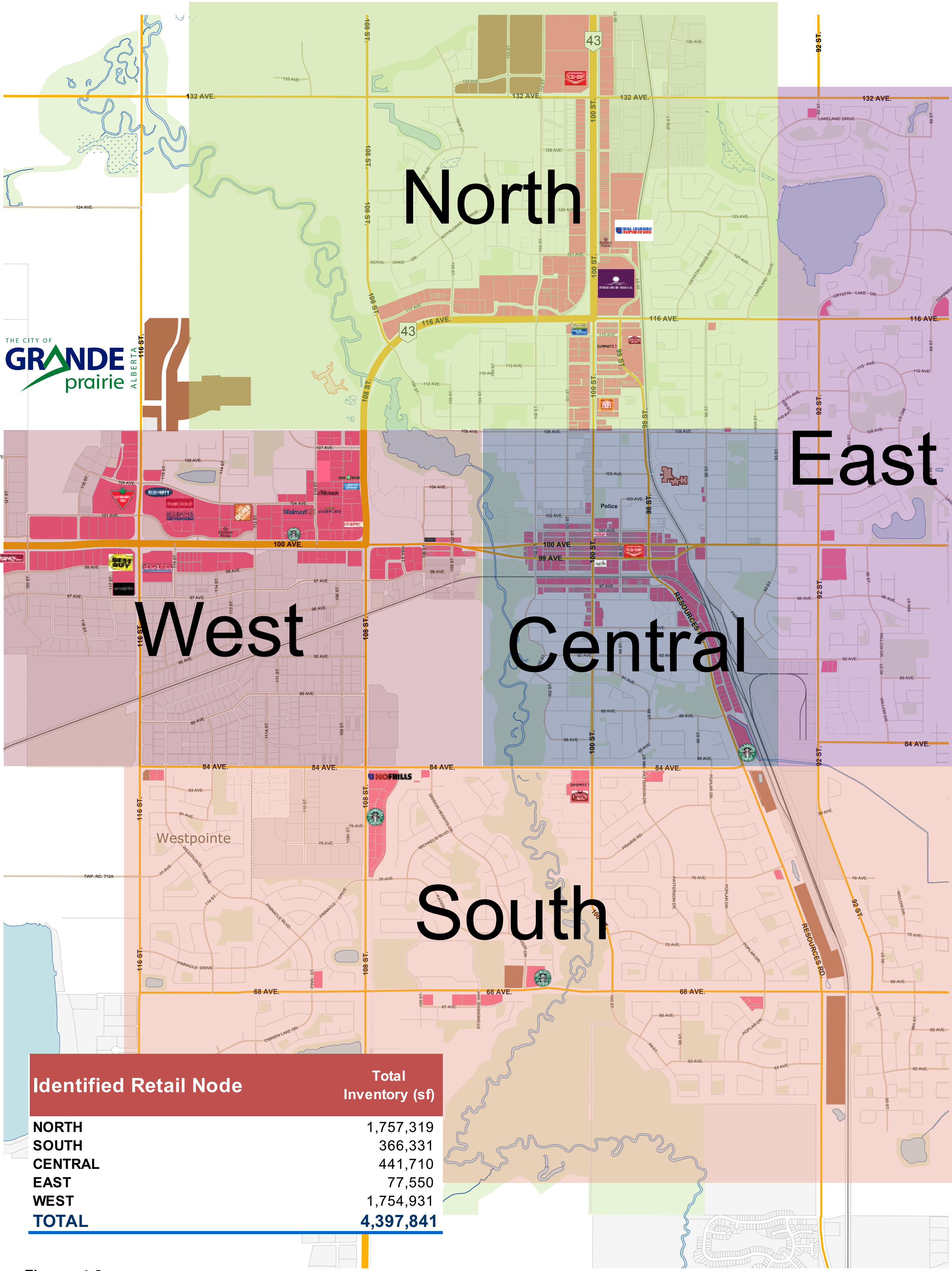
Figure 4.1 documents and highlights the major retail areas and future projects, as well as major branded tenants spread around the city. This diagrammatic profile also includes areas of future development as "zoned commercial".

Figure 4.1 clearly illustrates concentrations of retail activity in the West and North, which are highlighted by Power Centres such as Gateway and Westgate, freestanding retailers such as COSTCO, Walmart, Cineplex as well as the Prairie Mall, Real Canadian Superstore and Sears Centre.

Retail developments in the City of Grande Prairie cover a wide range of formats with new developments being provided at the regional, community and neighbourhood scale such as Westgate, South 40, Cobblestone Lane, Grande Banks/Stone Ridge and Mission Estates respectively.

Table 4.1
CITY OF GRANDE PRAIRIE RETAIL INVENTORY
(Source: City of Grande Prairie & Key Planning Strategies 2018)

Merchandise Category	Existing Inventory (SF)	Existing Inventory (%)	Number of Stores	% of Number of Stores	Average Store Size
Grocery & Specialty Foods	599,550	13.63%	53	5.9%	11,312
Pharmacy	79,663	1.81%	16	1.8%	4,979
Alcohol & Tobacco	115,558	2.63%	40	4.5%	2,889
Personal Services	255,005	5.80%	111	12.4%	2,297
Clothing & Apparel	361,678	8.22%	63	7.1%	5,741
Footwear	33,741	0.77%	16	1.8%	2,109
Jewelry & Accessories	44,904	1.02%	22	2.5%	2,041
Health & Beauty	87,997	2.00%	51	5.7%	1,725
Home Electronics & Appliances	127,204	2.89%	20	2.2%	6,360
Home Furnishings & Décor	308,322	7.01%	33	3.7%	9,343
Home Improvement & Gardening	267,445	6.08%	25	2.8%	10,698
Books & Media	18,094	0.41%	10	1.1%	1,809
Sporting Goods	131,015	2.98%	13	1.5%	10,078
Toys & Hobbies	40,268	0.92%	10	1.1%	4,027
Specialty Retail	284,053	6.46%	78	8.7%	3,642
Quick Service F&B	202,227	4.60%	128	14.3%	1,580
Full Service Restaurants	171,070	3.89%	44	4.9%	3,888
Arts & Entertainment	136,000	3.09%	8	0.9%	17,000
Drinking Establishments	25,114	0.57%	6	0.7%	4,186
Fitness & Leisure	81,105	1.84%	12	1.3%	6,759
Auto Parts & Accessories	177,918	4.05%	16	1.8%	11,120
Auto/RV/Motorsports Dealership	434,950	9.89%	25	2.8%	17,398
VACANT	414,961	9.44%	92	10.3%	4,510
TOTAL	**4,397,841**	**100.00%**	**892**	**100%**	**4,930**



Identified Retail Node	Total Inventory (sf)
NORTH	1,757,319
SOUTH	366,331
CENTRAL	441,710
EAST	77,550
WEST	1,754,931
TOTAL	**4,397,841**

Figure 4.2
RETAIL SECTORS
(Source: Key Planning Strategies, 2019)

4.39 m sf

CITY OF GRANDE PRAIRIE'S RETAIL INVENTORY (as of Dec 2018)

As Grande Prairie continues to grow and evolve, and new developments become more appropriate for tenants, areas such Downtown or other older projects will need to find ways to enhance or redefine their spaces and positioning.

4.4
CITYWIDE RETAIL INVENTORY

To document the retail inventory for the City of Grande Prairie, Key Planning Strategies conducted on-the-ground fieldwork in December 2018 (to update previous studies in 2014 and 2016) during which every retail project and node was documented in terms of the retail store brand, merchandise category and estimated unit size.

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 and satellite mapping measurements.

Since 2012, over 840,000 sf of new space has entered the market. The majority of this new retail has taken place in the west side of the city at and around the **Westgate Centre**, but also in the south at the **South 40 Centre**. The west side continues to be active in adding new commercial opportunities into 2019, where a new, larger Canadian Tire opened in early 2019.

However, as the west side continues quickly towards buildout, new development at **Trader Ridge** in the North is beginning to take shape with the recent opening of Windsor Ford, which is the largest Ford Dealership in Canada, and a CO-OP Grocery that is scheduled to open in August 2019.

Further retail is planned at this node that will provide approximately 270,000, not including future potential auto dealerships, hotels and light industrial uses. Trader Ridge is well-positioned to attract customers from neighbouring and rural communities further north in the County of Grande Prairie and beyond. The additional draw will further benefit Prairie Mall by virtue of its proximity.

As documented in **Tables 4.1 and 4.2**, the City of Grande Prairie has an estimated retail floorspace of approximately 4.39 million sf. This retail floorspace is comprised of approximately +/- 816 retail premises that range from Auto Dealerships to Restaurants and Personal Services such as Florists or Salons.

Within many of the retail projects in Grande Prairie, Personal and Professional Services often occupy what would otherwise be traditional streetfront retail space. Accordingly, the retail inventory does not account for Professional Services (e.g. Dental, Medical etc.) that occupy these spaces, since they do not carry an associated "Retail Sales Productivity".

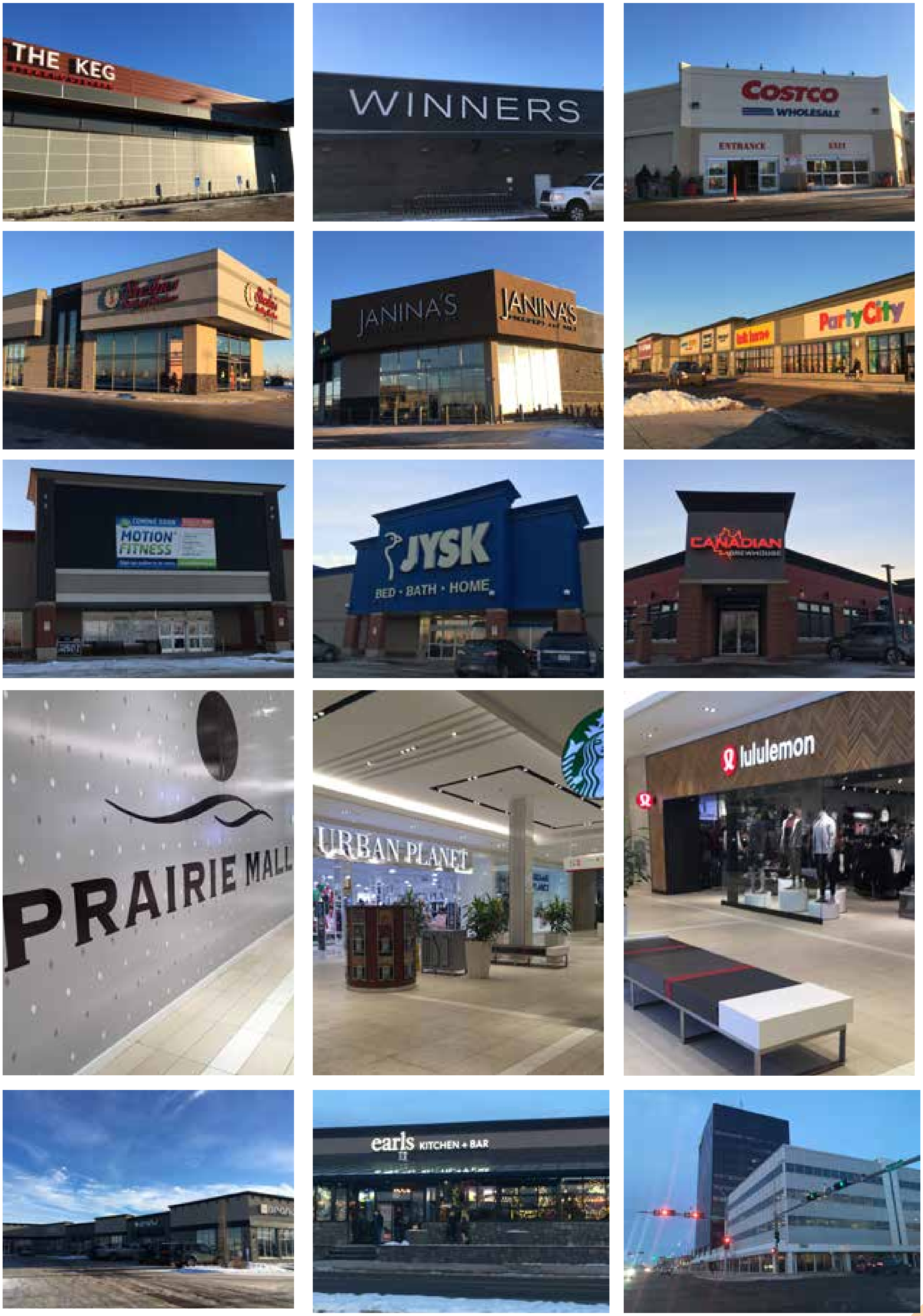
A review of Grande Prairie's competitive retail environment provides a number of indicators as to potential merchandise and tenant opportunities.

The local market has reached a threshold whereby a number of other regional or national 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.

Figure 4.3

REPRESENTATIVE CITY RETAIL IMAGERY & MAJOR PROJECT BROCHURE PROFILES

Source: Photos by Key Planning Strategies



CUSHMAN & WAKEFIELD
Edmonton

FOR LEASE
The Shops of Trader Ridge
Northwest Corner of 132 Avenue & 100 Street
Grande Prairie, AB

North Grande Prairie's Premier Retail Development

Property Highlights

- Join CO-OP Grocery, Gas Bar, Convenience Store & Liquor Store, Starbucks, Popeye's Chicken, Bone & Biscuit and Panago Pizza!
- Located in the heart of North Grande Prairie expanding residential and commercial districts
- Traffic count at this intersection is in excess of 32,500 (2015) vehicles per day
- Grande Prairie currently has 68,556 residents
- Trade area of 230,000 people
- Average household income of $109,361 (3 km radius)
- One of the youngest populations in Canada with a median age of 33.5 years

Gary Killips
Partner
780 917 8332
gary.killips@cwedm.com

Brett Killips
Partner
780 702 2948
brett.killips@cwedm.com

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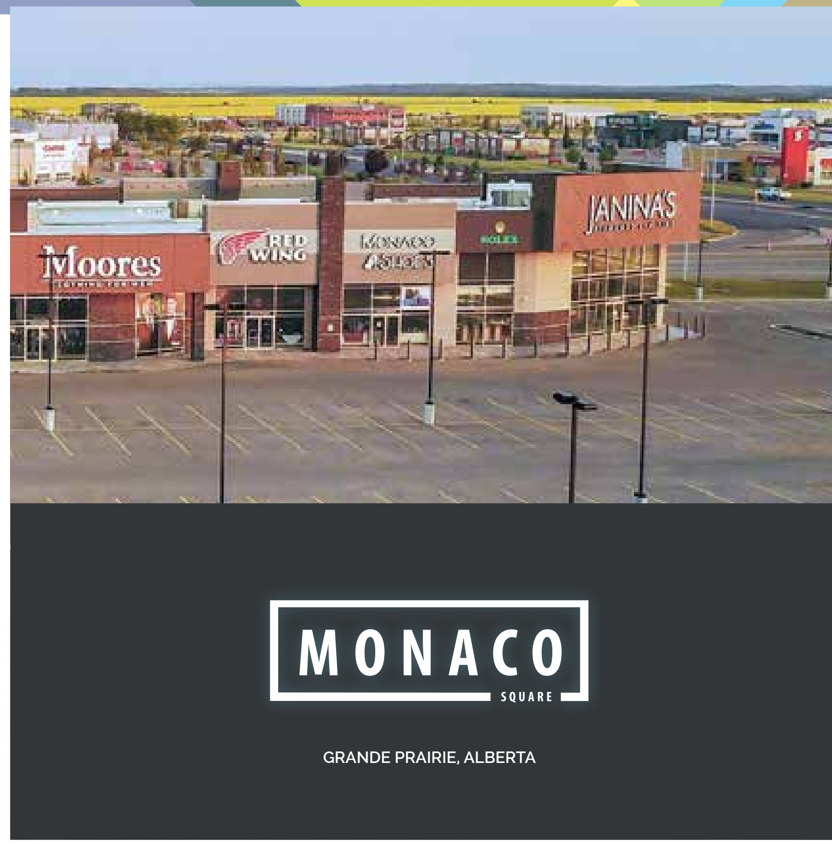
Edmonton
Suite 2700, TD Tower
10088 - 102 Avenue
Edmonton, AB T5J 2Z1
www.cwedm.com



PRAIRIE MALL

Grande Prairie, Alberta

Prairie Mall, based in Grande Prairie, Alberta, is the largest indoor shopping centre in northwestern Alberta, serving the immediate region as well as northeastern British Columbia. Servicing a trade area of over 230,000 people, Prairie Mall has 102 retailers with local, national, and international brands. At over $600 per square foot consistently in revenues, Prairie Mall is one of the highest performing shopping centres in Western Canada. With a market of over 80% under the age of 45, and one of the most prosperous regions of Canada due to strong primary industries such as oil and gas, the centre is well-positioned for continued growth and diversity.

112,000 SF

UNDER REDEVELOPMENT

Adding 10 National Retailers

CENTRE PROFILE

Total Square Feet	278,255
Total SF of CRU Tenants	185,041
Number of Stores/Services	102
Number of Levels	1
Number of Parking Spaces	1,564

MAJOR TENANTS

Ardene	17,000 SF
Dollarama	10,006 SF
Marshalls	23,857 SF
Shoppers Drug Mart	14,844 SF
Urban Planet	21,646 SF

MARKET DEMOGRAPHICS

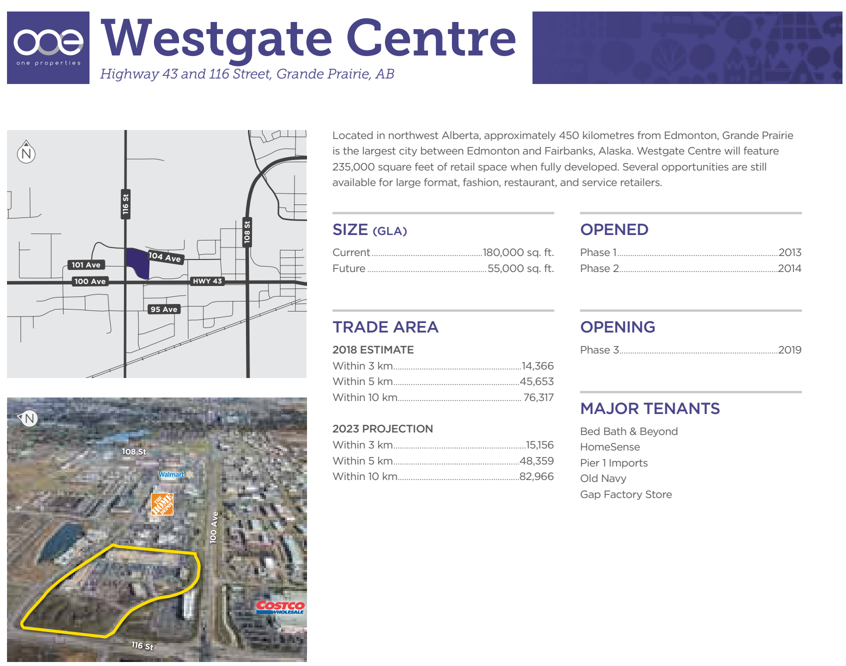
Primary Trade Area	
Population	107,513
Number of Households	39,617
Average Household Income	$129,729
Secondary Trade Area	
Population	126,143
Number of Households	47,917
Average Household Income	$112,751
Traffic	
Annual Pedestrian Traffic	2,333,493

Source:
Market Demographics: Environics Analytics, DemoStats Trends, 2019.

PRAIRIE MALL
41, 11801 - 100 Street
Grande Prairie, AB T8V 3Y2
Phone 780-532-1810
shopprairiemall.com

LEASING INQUIRIES
55 City Centre Drive, Suite 800, Mississauga, ON L5B 1M3
Phone 905-281-3800 Toll Free 1-800-928-6255
leasing@morguard.com
morguard.com

Morguard
Real Estate Potential. Realized.



one properties

Westgate Centre

Highway 43 and 116 Street, Grande Prairie, AB

Located in northwest Alberta, approximately 450 kilometres from Edmonton, Grande Prairie is the largest city between Edmonton and Fairbanks, Alaska. Westgate Centre will feature 235,000 square feet of retail space when fully developed. Several opportunities are still available for large format, fashion, restaurant, and service retailers.

SIZE (GLA)

Current	180,000 sq. ft.
Future	55,000 sq. ft.

OPENED

Phase 1	2013
Phase 2	2014

TRADE AREA

2018 ESTIMATE	
Within 3 km	14,366
Within 5 km	45,653
Within 10 km	76,317
2023 PROJECTION	
Within 3 km	15,156
Within 5 km	48,359
Within 10 km	82,966

OPENING

Phase 3	2019

MAJOR TENANTS

Bed Bath & Beyond
HomeSense
Pier 1 Imports
Old Navy
Gap Factory Store

1.75 million sf

AMOUNT OF RETAIL IN EACH OF THE NORTH & WEST SECTORS OF THE CITY

4.5
RETAIL INVENTORY BY SECTOR

Based on the fieldwork and inventory, Grande Prairie's Retail environment was allocated into 5 Sectors (refer to **Figure 4.2**). Each Sector was determined based on geographic and spatial factors such as road networks, patterns of residential development, types of inventory. The result were the following Sectors totaling 4.39 million sf:

- North Sector 1.76 million sf
- West Sector 1.75 million sf
- Central Sector 442,000 sf
- South Sector 366,000 sf
- East Sector 78,000 sf

The North and West Sectors comprise the majority of the comparison or destination types of shops and services including new-to-market brands, while the Central Sector has a large number of local and independent businesses. The East Sector is comprised of Neighbourhood-serving nodes, while the South Sector is set to become a strong node for Community-scale shops and services catering to the areas of current and future residential growth.

Table 4.2 provides a breakdown of the City's retail inventory by Category and by Sector.

It is worth noting however, that because a specific Sector 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.

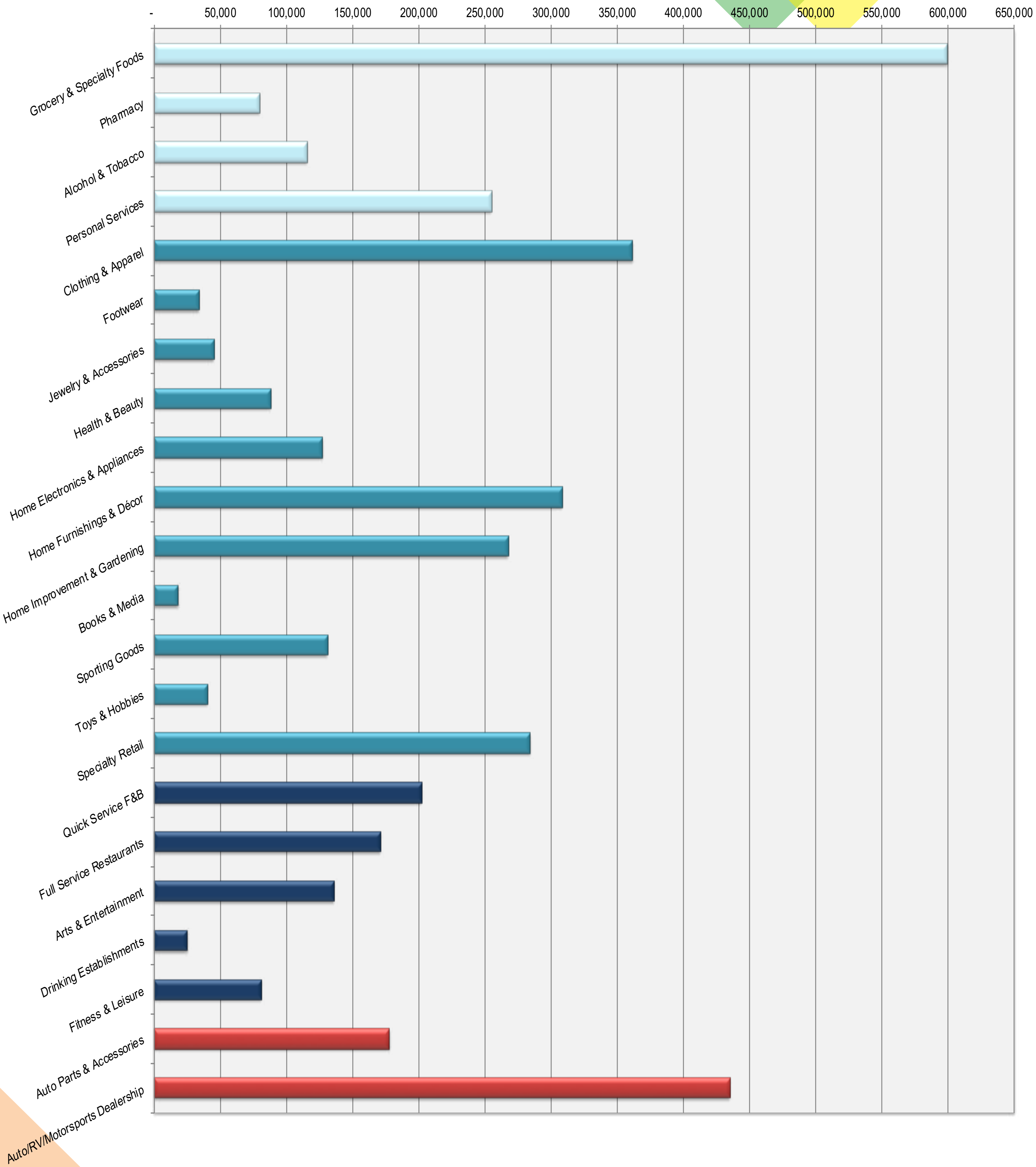
Table 4.2
RETAIL INVENTORY BY CATEGORY & SECTOR
(Source: Key Planning Strategies 2018/2019)

Merchandise Category	IDENTIFIED RETAIL NODE (sf)					TOTAL (sf)
	NORTH	SOUTH	CENTRAL	EAST	WEST	
Grocery & Specialty Foods	211,726	130,050	49,000	14,050	194,724	**599,550**
Pharmacy	22,844	30,641	1,750	15,000	9,428	**79,663**
Alcohol & Tobacco	32,500	35,000	7,050	14,250	26,758	**115,558**
Personal Services	73,195	29,608	63,550	10,250	78,402	**255,005**
Clothing & Apparel	173,285	2,000	22,250	0	164,143	**361,678**
Footwear	14,396	0	2,000	0	17,345	**33,741**
Jewelry & Accessories	32,341	0	4,250	0	8,313	**44,904**
Health & Beauty	37,697	2,750	24,000	2,000	21,550	**87,997**
Home Electronics & Appliances	26,274	0	19,050	0	81,880	**127,204**
Home Furnishings & Décor	108,844	0	42,500	0	156,978	**308,322**
Home Improvement & Gardening	69,000	0	1,000	0	197,445	**267,445**
Books & Media	10,879	0	3,000	0	4,215	**18,094**
Sporting Goods	65,307	0	0	0	65,708	**131,015**
Toys & Hobbies	8,616	0	2,000	0	29,652	**40,268**
Specialty Retail	64,874	4,250	58,700	1,000	155,229	**284,053**
Full Service Restaurants	57,931	18,000	47,700	1,500	45,939	**171,070**
Quick Service F&B	43,278	55,736	21,850	12,000	69,363	**202,227**
Arts & Entertainment	13,000	0	18,000	0	105,000	**136,000**
Drinking Establishments	2,000	8,000	7,000	0	8,114	**25,114**
Fitness & Leisure	11,000	16,000	3,600	5,000	45,505	**81,105**
Auto Parts & Accessories	76,700	0	0	0	101,218	**177,918**
Auto/RV/Motorsports Dealership	309,500	0	2,350	0	123,100	**434,950**
VACANT	292,132	34,296	41,110	2,500	44,923	**414,961**
TOTAL	**1,757,319**	**366,331**	**441,710**	**77,550**	**1,754,931**	**4,397,841**

Figure 4.4

CITY OF GRANDE PRAIRIE RETAIL INVENTORY FLOORSPACE BY CATEGORY

(Source: Key Planning Strategies 2018/2019)



440,000 sf

AMOUNT OF CLOTHING & APPAREL AND FOOTWEAR FLOORSPACE IN CITY

This is particularly the case for the East Sector, which provides the basic day-to-day needs for its local trade area residents.

Conversely, the North Sector has a wide array of all types of shops and services, though its largest retail categories are Auto Dealerships (310,000 sf / 18%), Grocery (211,00 sf / 12%) and Clothing & Apparel and Footwear (187,700 sf /11%) of the total North Sector floorspace.

The continuing progress of the **Shops of Trader Ridge** in the North will further bolster the potential to become an auto dealership hub, premised around the recently opened Windsor Ford, the largest Ford dealership in Canada. Additionally, the future availability of approximately 270,000+ sf of new retail will provide ample opportunities to attract new and additional retail fronting one of the most highly visible and travelled routes in Northern Alberta, where traffic counts exceed 32,000 vehicles per day. Recent CRU tenant announcements include Starbucks, Bone n Biscuit, Popeye's and Panago, as well as a Dentist.

Prairie Mall is the dominant Fashion format in the City, although Westgate has continued to gain a strong foothold in the market. Both formats have value to destination and new-to-market types of retailers.

The South Sector's largest retail category is Grocery & Specialty Foods which currently accounts for 37% of the total South Sector floorspace. This high ratio is driven by the fact that the South is the dominant growing residential area for the City.

The current vacancy in the South Sector (12,000 sf) is recently completed space that is in the process of being leased in the **South 40 Centre**.

Relative to the amount of space in the Central Sector, Personal Services represent approximately 17% of the Central Sector floorspace. In a Downtown environment, where traditional retail space has left in favour of "suburban" developments, Personal and Professional Services do have a tendency to cluster in conjunction with office populations as a centrality for a region.

The Co-op Grocery downtown also represents a significant representation in the floorspace and is considered an integral part of any potential Downtown revitalization or enhancement.

4.6
RETAIL INVENTORY BY CATEGORY

Categories of retail were incorporated into the overall inventory list as shown in **Figures 4.4 & 4.5**. Designating retail categories to the overall inventory makes it possible to conduct a void analysis for Grande Prairie. Categories were designated to correspond directly with the categories of retail utilized in spending data, thereby making retail inflow and outflow calculations correlate.

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

1. *Grocery & Specialty Foods* *599,000 sf*
2. *Auto/RV/Motorsports* *435,000 sf*
3. *Food & Beverage Premises* *398,000 sf*
4. *Clothing/Apparel & Footwear* *395,000 sf*
5. *Home Furnishings* *308,000 sf*

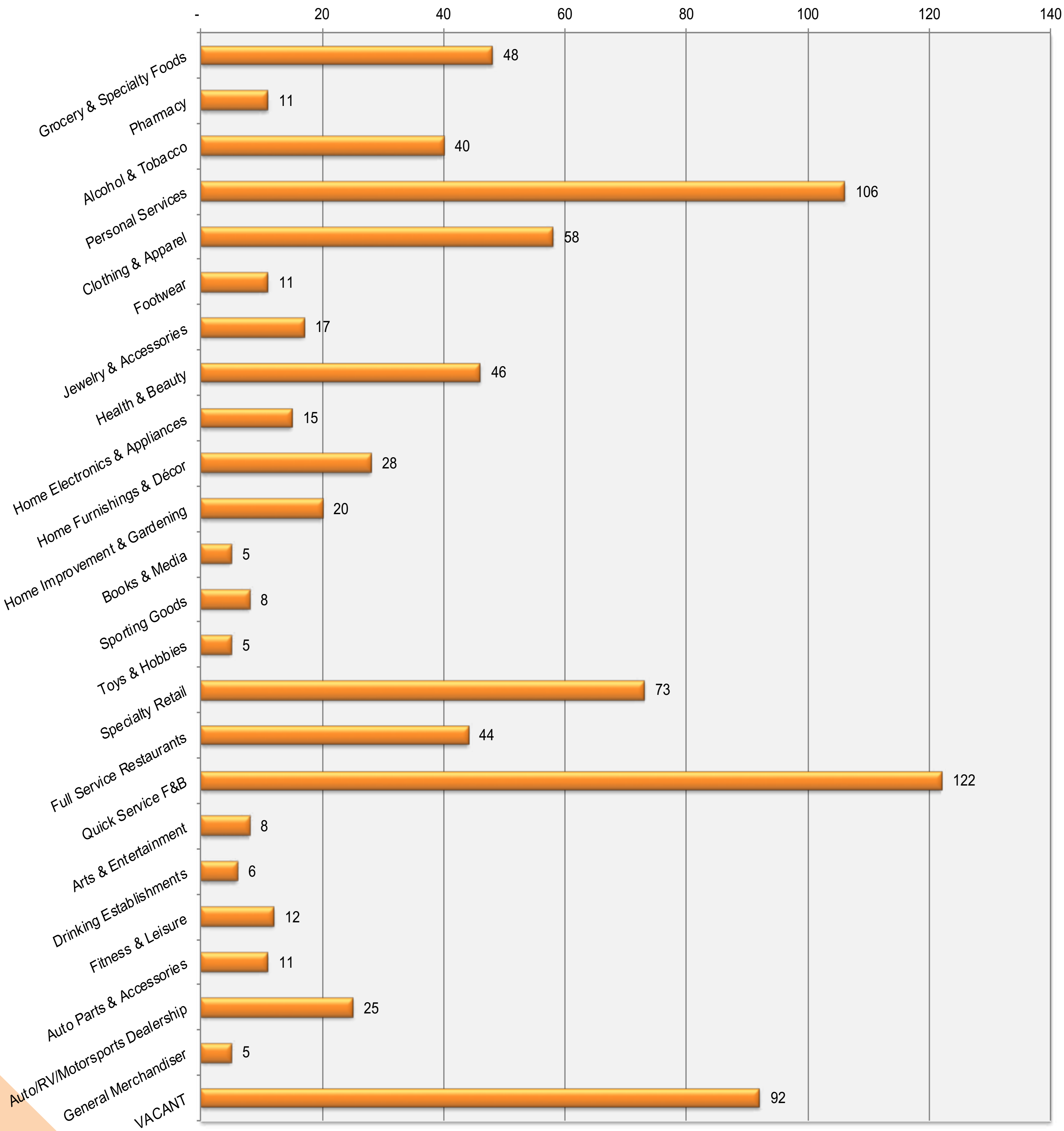
Newer developments/redevelopments such as Westgate, Vision West, Shops of Trader Ridge, South 40, Grande Banks/Stone Ridge have the potential to create a better foundation for success for both local and branded tenants.

Figure 4.5

CITY OF GRANDE PRAIRIE RETAIL INVENTORY BY CATEGORY & NUMBER OF STORES

General Merchandise for Stores includes Costco, Real Canadian Superstore, Canadian Tire, Wal-Mart and London Drugs, whose inventory often comprises many retail categories. For the purposes of counting the number of stores, General Merchandiser was added).

(Source: Key Planning Strategies 2018/2019)



+/-816

NUMBER OF RETAIL STORES IN CITY OF GRANDE PRAIRIE

(including vacant ground level spaces)

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.

Categories which show a low level of inventory include Toys & Hobbies (40,000 sf) and Books & Media (18,000 sf). Together these three categories make up only 1.3% of Grande Prairie's total retail inventory. Each of these categories could be considered under-served yet conducive to Grande Prairie's market profile.

However, industry-wide the book industry continues to struggle in the face of on-line competition. Nonetheless, a store such as Indigo which is a slightly smaller footprint than a typical Chapters location could represent a strong addition to the city's retail inventory. The recreation of Indigo as a "Cultural Department Store" has reinvigorated the reading retail landscape and should be a tenant actively pursued by the City at either Prairie Mall, former Sears, Shops of Trader Ridge or Westgate.

4.7

RETAIL INVENTORY BY CLASS

As previously shown through a retail inventory category analysis and location analysis, there exists various forms of imbalance in the Grande Prairie retail market.

Grande Prairie's retail landscape and inventory is dominated by the North and West Sectors, but the West Sector has recently begun to exhibit significant strength, partly due to varying degrees of infrastructure quality as well as the location itself which places this Sector in the strongest location to tap into the regional Trade Area market.

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 Grande Prairie'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 **Table 4.3**).

Table 4.3

RETAIL INVENTORY SUMMARY BY SECTOR & CLASS

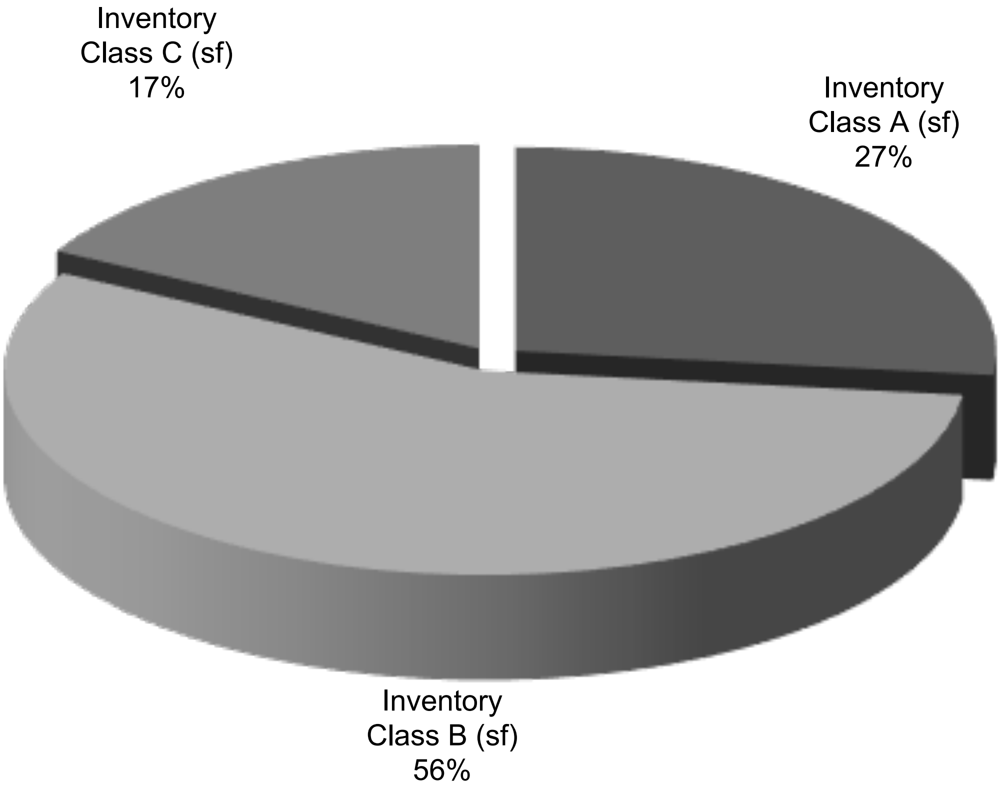
(Source: Key Planning Strategies 2018/2019)

Identified Retail Node	Total Inventory (sf)	Inventory Class A (sf)	Inventory Class B (sf)	Inventory Class C (sf)
NORTH	1,757,319	511,338	892,581	353,400
SOUTH	366,331	56,000	295,831	14,500
CENTRAL	441,710	5,300	143,050	293,360
EAST	77,550	17,000	52,000	8,550
WEST	1,754,931	593,108	1,081,429	80,394
TOTAL	**4,397,841**	**1,182,746**	**2,464,891**	**750,204**

Figure 4.6

CITY OF GRANDE PRAIRIE RETAIL INVENTORY BY CLASS OF RETAIL SPACE

(Source: Key Planning Strategies 2018/2019)



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.*

64 sf

RATIO OF FLOORSPACE PER CAPITA IN CITY (including vacant space)

The role of the Classification is to provide a sensitized figure against which sales productivities can be forecast. For example, a clothing store in Downtown Grande Prairie is likely to have a lower sales productivity than a clothing store in the Prairie Mall. Such differences need to be taken into account when estimating retail sales and resulting demand.

As displayed in **Figure 4.5**, the calibre of retail in Grande Prairie can best be classified as average in that the majority of retail spaces fall within the B Class quality (56%). C and A Class accounts for 17% and 27% respectively of total retail space. Since the original Gap Analysis in 2013, the inventory in the City has continued to shift towards more higher quality and new retail spaces which are critical to attracting tenants to the City. With the number of new developments either under construction or proposed in the City, the amount of A Class space continues to increase. An increase in higher quality retail spaces located in high traffic and well patronized areas will create notable opportunities for exposing the Grande Prairie 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 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 including streetfront retail or small strip centres) is in the range of 30 sf to 40 sf (Source: International Council of Shopping Center).

Most markets that fall within the 30 to 40 sf per capita range 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.

In markets that are more remote or removed from a metropolitan region, but are regional in their catchment, such as Grande Prairie, it is not uncommon for retail space per capita to be in the range of 55 to 65 sf.

When applying the retail inventory for the City of Grande Prairie (4.39 million sf) against the City's population of 69,088 (2018 Municipal Census), the resulting per capita ratio is 63.7. This figure in isolation may seem high, but given the remote location relative to the City of Edmonton, the figure further indicates regional catchment Grande Prairie services.

The per capita space ratio can be further used as a guide when forecasting future demand for the city, assuming that the regional audiences will continue to be attracted to Grande Prairie, as evidenced thus far.

4.9
SUMMARY & IMPLICATIONS

The resulting inventory of almost 4.4 million sf and relatively low vacancy in the City of Grande Prairie validates the regional serving nature and destination appeal of the retail offering. Grande Prairie is more than just a remote local market, but rather a proven regional destination.

The City is the beneficiary of a location that is far enough from the City of Edmonton and close enough to urban centres in Northeastern British Columbia that it can provide the shops and services for a wide area.

Moreover, the city has numerous retail development opportunities ranging from large format Power Centres, a very busy Regional Enclosed Mall, new Community Shopping Centres and Neighbourhood Centres, and traditional Downtown shops and services. Each of these formats provides a range of potential opportunities for retailers and investors in terms of store sizes, categories etc.

The evolution of Grande Prairie's retail market over the past decade has become more evident in the quality of retail spaces available to tenants. It is critical for a burgeoning market to have high quality retail spaces available rather than obsolete spaces. Many retailers looking at Grande Prairie will be seeking new or redeveloped spaces rather than older spaces that require renovations.

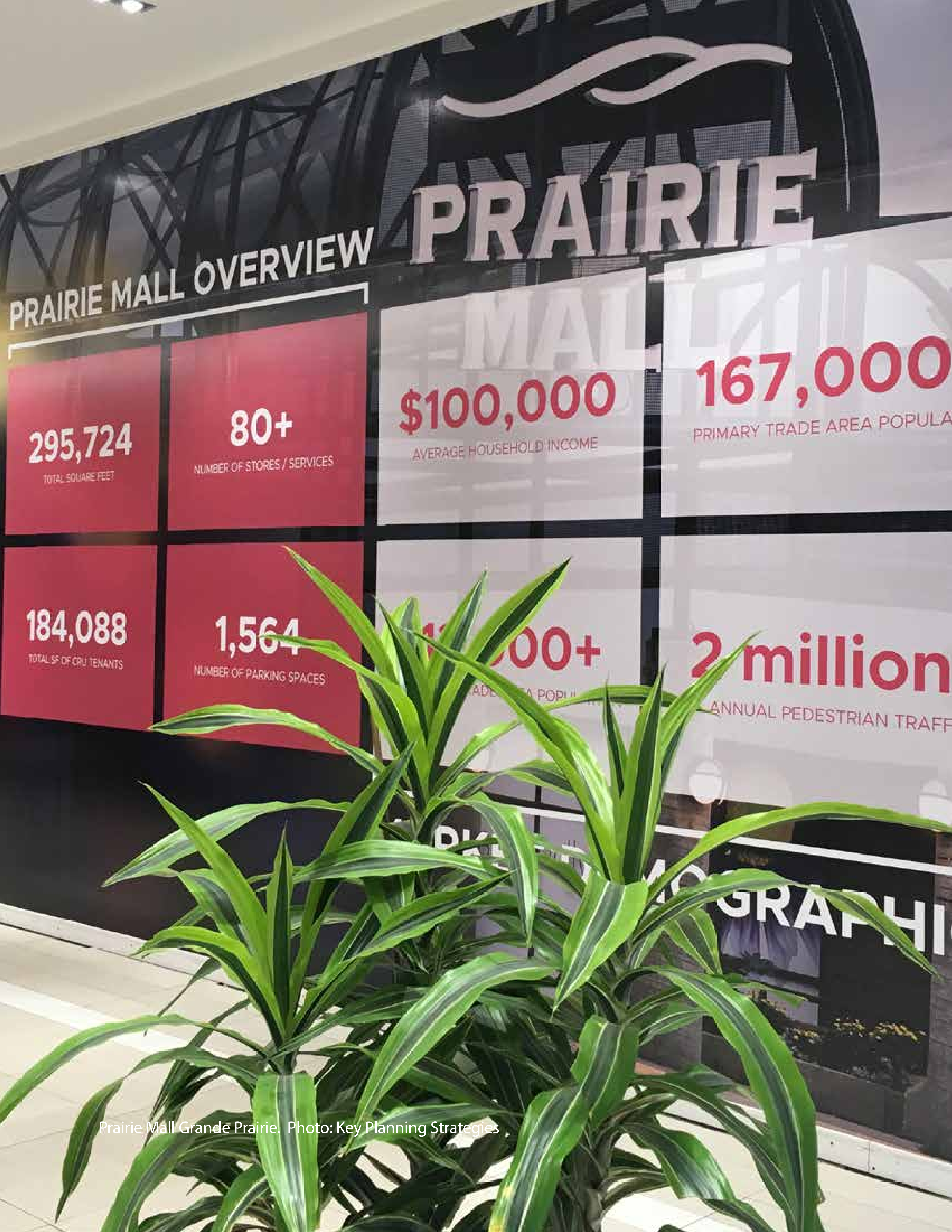
Both the West and North Sectors of the city at approximately 1.75 million sf of space each are dominant retail nodes, each exhibiting continued growth dynamics.

While Westgate is the recipient of the newest and largest single-storey Canadian Tire in Canada, Trader Ridge in the North Sector is the recipient of the largest Ford Dealership in Canada.

Both of these areas present a diversity of new development formats suitable to a wide range of tenant formats and brands that will undoubtedly ensure greater retention and attraction of retail sales in the City from its large trade area.

The overall retail inventory for the City of Grande Prairie is best classified as a progressive retail environment in which there are opportunities for small to large and local to national tenants.

Trendy tenants like Uniqlo, H&M, Muji and Indigo should be among the top targeted priorities that match the demographic profile and active space listings.



Prairie Mall Grande Prairie. Photo: Key Planning Strategies

5 RETAIL DEMAND & GAP ANALYSIS

5.1 INTRODUCTION

The following section will quantify the amount of supportable floorspace in the City of Grande Prairie as justified by the Trade Area which 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 estimated to come from Grande Prairie's respective Retail Trade Areas. 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 $/sf); a metric commonly used by the retail industry to quantify sales performance, the estimated warranted or supportable floorspace can be calculated.

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

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.

City of Grande Prairie Supply - Demand

Starting with **Table 5.1**, the City of Grande Prairie as a stand-alone market is quantified to determine, based on expenditure and market shares, just how much retail space the City's almost 69,000 residents would justify.

Accordingly, **Table 5.1** reveals that the City's residents could justify approximately just over 2.24 million sf of retail space, at an overall market share of 73%.

Since this study is examining the City of Grande Prairie's retail market, the resulting market shares and demand are viewed as "retained" in that 73% of total City of Grande Prairie resident spending is retained in the City of Grande Prairie. The remaining 27% is likely spent elsewhere and most likely in the City of Edmonton on Destination and Entertainment or on-line.

The resulting figures in **Table 5.1** depict a market that has a strong propensity and desire to shop in the City. Much of this decision is based on the location of Grande Prairie relative to its nearest major metropolitan. It is this sentiment that is equally applicable to the other cities and towns that comprise Grande Prairie's Retail Trade Area.

In addition to retail spending from the residents of the City of Grande Prairie, retail businesses in the City source a substantial amount of spending from residents outside of the City of Grande Prairie.

TABLE 5.1

CITY OF GRANDE PRAIRIE RETAIL FLOORSPACE DEMAND

Retail Spending by Merchandise Category	2018			
	City of GP Retail Sales Productivity ($psf)	Retained Market Share	Retained Sales $	Floorspace Demand (sf)
Grocery & Specialty Foods	$550	90%	$239,409,269	435,290
Pharmacy	$550	90%	$17,900,644	32,547
Alcohol & Tobacco	$500	90%	$37,813,926	75,628
Personal Services	$200	90%	$36,937,836	184,689
Clothing & Apparel	$300	70%	$47,845,547	159,485
Footwear	$300	70%	$16,593,086	55,310
Jewelry & Accessories	$500	70%	$9,337,064	18,674
Health & Beauty	$450	70%	$17,035,078	37,856
Home Furniture & Décor	$275	45%	$18,362,367	66,772
Home Electronics & Appliances	$450	35%	$45,212,017	100,471
Home Improvement & Gardening	$225	90%	$34,191,176	151,961
Books & Media	$200	45%	$17,604,667	88,023
Sporting Goods	$250	60%	$6,724,580	26,898
Toys & Hobbies	$250	60%	$5,493,319	21,973
Specialty Retail	$250	50%	$8,261,026	33,044
Quick Service F&B	$550	80%	$9,344,957	16,991
Full Service Restaurants	$450	70%	$50,607,992	112,462
Arts & Entertainment	$175	75%	$22,395,536	127,974
Drinking Establishments	$400	90%	$6,393,087	15,983
Fitness & Leisure	$200	95%	$13,871,420	69,357
Auto Parts & Accessories	$375	90%	$17,734,897	47,293
Auto/RV/Motorsports Dealerships	$450	75%	$164,621,990	365,827
TOTAL RETAIL CATEGORIES ONLY	**$376**	**73%**	**$843,691,482**	**2,244,509**

TABLE 5.2

PTA (EXCLUDING GRANDE PRAIRIE) RETAIL FLOORSPACE DEMAND

Retail Spending by Merchandise Category	2018			
	PTA Retail Sales Productivity ($psf)	Inflow Market Share	Inflow Sales $	Floorspace Demand (sf)
Grocery & Specialty Foods	$550	40%	$177,852,540.40	323,368
Pharmacy	$550	40%	$15,531,302	28,239
Alcohol & Tobacco	$500	40%	$24,179,655	48,359
Personal Services	$200	40%	$26,357,784	131,789
Clothing & Apparel	$300	55%	$51,841,629	172,805
Footwear	$300	55%	$17,867,224	59,557
Jewelry & Accessories	$500	55%	$9,951,803	19,904
Health & Beauty	$450	55%	$19,658,675	43,686
Home Furniture & Décor	$275	55%	$31,203,585	113,468
Home Electronics & Appliances	$450	55%	$103,829,369	230,732
Home Improvement & Gardening	$225	40%	$25,686,070	114,160
Books & Media	$200	40%	$19,271,035	96,355
Sporting Goods	$250	55%	$8,165,292	32,661
Toys & Hobbies	$250	55%	$7,868,128	31,473
Specialty Retail	$250	55%	$15,829,076	63,316
Quick Service F&B	$550	55%	$10,150,500	18,455
Full Service Restaurants	$450	40%	$43,720,195	97,156
Arts & Entertainment	$175	65%	$30,341,932	173,382
Drinking Establishments	$400	40%	$4,417,348	11,043
Fitness & Leisure	$200	65%	$14,647,513	73,238
Auto Parts & Accessories	$375	40%	$11,508,976	30,691
Auto/RV/Motorsports Dealerships	$450	65%	$192,528,169	427,840
TOTAL RETAIL CATEGORIES ONLY	**$368**	**50%**	**$862,407,799**	**2,341,678**

This spending, as evidenced in the Trade Area delineation, reaches to Northeastern cities and towns of British Columbia, towns in Northern Alberta and is known to extent up to and including the Northwest Territories.

To account for this spending inflow originating outside of the City of Grande Prairie, Key Planning created the Primary and 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.

Primary Trade Area (Excluding City of Grande Prairie) Supply - Demand

Table 5.2 illustrates the magnitude of retail floorspace demand that is attributable to the remainder of the Primary Trade Area (101,987 residents), but **excluding** the City of Grande Prairie.

The purpose for excluding the City of Grande Prairie was to allow for a more sensitized market share approach, recognizing that garnering market shares from Dawson Creek for Grocery and other conveniences would not be as high as it would be from City of Grande Prairie residents.

The resulting analysis in **Table 5.2** reveals supportable floorspace demand of 2.3 million sf and an estimated market share of 50% attributable to residents in the Primary Trade Area (excluding City of Grande Prairie).

TABLE 5.3

TOTAL PTA (INCLUDING GRANDE PRAIRIE) RETAIL FLOORSPACE DEMAND

Retail Spending by Merchandise Category	2018			
	PTA Incl GP Retail Sales Productivity ($psf)	Inflow & Retained Market Share	Inflow & Retained Sales $	Floorspace Demand (sf)
Grocery & Specialty Foods	$550	59%	$417,261,810	758,658
Pharmacy	$550	57%	$33,431,946	60,785
Alcohol & Tobacco	$500	61%	$61,993,581	123,987
Personal Services	$200	59%	$63,295,620	316,478
Clothing & Apparel	$300	61%	$99,687,177	332,291
Footwear	$300	61%	$34,460,310	114,868
Jewelry & Accessories	$500	61%	$19,288,867	38,578
Health & Beauty	$450	61%	$36,693,752	81,542
Home Furniture & Décor	$275	51%	$49,565,952	180,240
Home Electronics & Appliances	$450	47%	$149,041,385	331,203
Home Improvement & Gardening	$225	59%	$59,877,246	266,121
Books & Media	$200	42%	$36,875,702	184,379
Sporting Goods	$250	57%	$14,889,873	59,559
Toys & Hobbies	$250	57%	$13,361,448	53,446
Specialty Retail	$250	53%	$24,090,102	96,360
Quick Service F&B	$550	65%	$19,495,457	35,446
Full Service Restaurants	$450	52%	$94,328,188	209,618
Arts & Entertainment	$175	69%	$52,737,468	301,357
Drinking Establishments	$400	60%	$10,810,435	27,026
Fitness & Leisure	$200	77%	$28,518,933	142,595
Auto Parts & Accessories	$375	60%	$29,243,873	77,984
Auto/RV/Motorsports Dealerships	$450	69%	$357,150,159	793,667
TOTAL RETAIL CATEGORIES ONLY	**$372**	**59%**	**$1,706,099,281**	**4,586,187**

TABLE 5.4

STA WEST RETAIL FLOORSPACE DEMAND

Retail Spending by Merchandise Category	2018 STA West Retail Sales Productivity ($psf)	Inflow Market Share	Inflow Sales $	Floorspace Demand (sf)
Grocery & Specialty Foods	$550	5%	$12,946,018	23,538
Pharmacy	$550	5%	$868,909	1,580
Alcohol & Tobacco	$500	5%	$1,512,189	3,024
Personal Services	$200	5%	$2,054,657	10,273
Clothing & Apparel	$300	25%	$12,889,611	42,965
Footwear	$300	25%	$4,512,564	15,042
Jewelry & Accessories	$500	25%	$2,580,323	5,161
Health & Beauty	$450	25%	$5,130,641	11,401
Home Furniture & Décor	$275	20%	$6,764,045	24,597
Home Electronics & Appliances	$450	25%	$27,393,424	60,874
Home Improvement & Gardening	$225	15%	$5,793,124	25,747
Books & Media	$200	20%	$4,819,802	24,099
Sporting Goods	$250	25%	$2,322,290	9,289
Toys & Hobbies	$250	25%	$2,262,283	9,049
Specialty Retail	$250	25%	$4,734,592	18,938
Quick Service F&B	$550	10%	$1,180,948	2,147
Full Service Restaurants	$450	15%	$10,801,350	24,003
Arts & Entertainment	$175	15%	$3,859,682	22,055
Drinking Establishments	$400	5%	$469,259	1,173
Fitness & Leisure	$200	5%	$774,097	3,870
Auto Parts & Accessories	$375	5%	$624,078	1,664
Auto/RV/Motorsports Dealerships	$450	25%	$37,864,733	84,144
TOTAL RETAIL CATEGORIES ONLY	**$358**	**15%**	**$152,158,617**	**424,636**

TABLE 5.5

STA EAST RETAIL FLOORSPACE DEMAND

Retail Spending by Merchandise Category	2018 STA East Retail Sales Productivity ($psf)	Inflow Market Share	Inflow Sales $	Floorspace Demand (sf)
Grocery & Specialty Foods	$550	10%	$13,687,733	24,887
Pharmacy	$550	10%	$930,106	1,691
Alcohol & Tobacco	$500	10%	$1,966,234	3,932
Personal Services	$200	10%	$2,024,064	10,120
Clothing & Apparel	$300	15%	$4,586,674	15,289
Footwear	$300	15%	$1,583,107	5,277
Jewelry & Accessories	$500	15%	$871,070	1,742
Health & Beauty	$450	15%	$1,769,249	3,932
Home Furniture & Décor	$275	10%	$1,750,574	6,366
Home Electronics & Appliances	$450	15%	$9,153,468	20,341
Home Improvement & Gardening	$225	10%	$1,949,366	8,664
Books & Media	$200	10%	$1,750,574	8,753
Sporting Goods	$250	15%	$692,158	2,769
Toys & Hobbies	$250	15%	$712,037	2,848
Specialty Retail	$250	15%	$1,228,896	4,916
Quick Service F&B	$550	5%	$274,694	499
Full Service Restaurants	$450	5%	$1,694,551	3,766
Arts & Entertainment	$175	10%	$1,462,627	8,358
Drinking Establishments	$400	5%	$151,805	380
Fitness & Leisure	$200	5%	$337,344	1,687
Auto Parts & Accessories	$375	10%	$955,406	2,548
Auto/RV/Motorsports Dealerships	$450	10%	$10,548,024	23,440
TOTAL RETAIL CATEGORIES ONLY	**$370**	**11%**	**$60,079,762**	**162,203**

1.02 M SF

ESTIMATED RESIDUAL RETAIL DEMAND IN CITY

(as of Feb 2019 including vacant space)

Total Primary Trade Area (Including City of Grande Prairie) Supply - Demand

Table 5.3 illustrates to combined demand resulting from the Total Primary Trade Area, including the City of Grande Prairie. The figures reveal demand for approximately 4.6 million sf of retail at a combined market share of approximately 59%. Interestingly, this total PTA figure almost mirrors the City's current inventory.

Secondary Trade Area West Supply - Demand

Each of the Secondary Trade Areas is not as populated as the Primary Trade Area and as such the amount of demand attributable is lower.

For most of these Secondary Trade Areas, demand is in the form of Comparison or Department Store Type Merchandise (such as Fashion), Automobiles, or Leisure (such as Sporting Goods and Toys). Convenience categories are more regularly purchased locally, but destination-type tenants such as COSTCO do play a notable role for less frequent, but nonetheless consistent patronage.

Table 5.4 reveals the demand for floorspace in the City of Grande Prairie attributable to residents in the STA West at approximately 424,600 sf at a market share of 15%.

Secondary Trade Area East Supply - Demand

Table 5.5 reveals demand for floorspace in the City of Grande Prairie attributable to residents in the STA East at approximately 162,200 sf at a market share of 11%.

The STA East is the area with the lowest market share because of its location relative to the decision-making process of driving 2 hours or less to Grande Prairie, or 2 hours or more to Edmonton and projects such as West Edmonton Mall or South Edmonton Common.

Secondary Trade Area North Supply - Demand

Table 5.6 reveals demand for floorspace in the City of Grande Prairie attributable to residents in the STA West at approximately 250,400 sf at a market share of 32%.

Because northern communities often have to travel through Grande Prairie to other Alberta destinations, it is reasonable to apply higher market shares to these customers.

Total Trade Area Supply - Demand

Table 5.7 aggregates the total demand for floorspace in the City of Grande Prairie attributable to residents of the Primary and Secondary Trade Areas at approximately 5.4 million.

When compared against the current city's retail inventory or supply at 4.39 million sf, the difference between demand and supply equates to almost 1,065,211 sf of residual retail demand that could be supported in the City of Grande Prairie (this value includes current vacant space in the City).

If one factors into the equation a forecasted PTA population growth of approximately +/-34,000 over the next decade to the year 2028 (the majority of which will be in the City of Grande Prairie), then the estimated future floorspace demand could grow by approximately 1.02 million sf (34,000 x 30 sf per capita). However, much of this future growth is likely to be part of existing residual demand thereby creating a very balanced retail market.

TABLE 5.6

STA NORTH RETAIL FLOORSPACE DEMAND

Retail Spending by Merchandise Category	2018 STA North Retail Sales Productivity ($psf)	Inflow Market Share	Inflow Sales $	Floorspace Demand (sf)
Grocery & Specialty Foods	$550	15%	$10,723,174	19,497
Pharmacy	$550	15%	$583,231	1,060
Alcohol & Tobacco	$500	15%	$1,401,570	2,803
Personal Services	$200	15%	$1,609,435	8,047
Clothing & Apparel	$300	50%	$8,203,577	27,345
Footwear	$300	50%	$2,842,158	9,474
Jewelry & Accessories	$500	50%	$1,564,028	3,128
Health & Beauty	$450	50%	$3,195,325	7,101
Home Furniture & Décor	$275	40%	$3,651,416	13,278
Home Electronics & Appliances	$450	50%	$16,504,695	36,677
Home Improvement & Gardening	$225	40%	$3,963,548	17,616
Books & Media	$200	20%	$1,936,031	9,680
Sporting Goods	$250	50%	$1,372,308	5,489
Toys & Hobbies	$250	50%	$1,294,948	5,180
Specialty Retail	$250	50%	$2,102,188	8,409
Quick Service F&B	$550	15%	$356,195	648
Full Service Restaurants	$450	20%	$3,405,207	7,567
Arts & Entertainment	$175	20%	$1,555,282	8,887
Drinking Establishments	$400	5%	$71,979	180
Fitness & Leisure	$200	5%	$161,784	809
Auto Parts & Accessories	$375	10%	$503,852	1,344
Auto/RV/Motorsports Dealerships	$450	50%	$25,293,520	56,208
TOTAL RETAIL CATEGORIES ONLY	**$369**	**32%**	**$92,295,449**	**250,426**

TABLE 5.7

TOTAL TRADE AREA RETAIL FLOORSPACE DEMAND

Retail Spending by Merchandise Category	2018 Total Floorspace Demand (sf)	Current City Retail Inventory (sf)	Total Residual Demand (sf)
Grocery & Specialty Foods	826,580	599,550	-227,029
Pharmacy	65,117	79,663	14,546
Alcohol & Tobacco	133,747	115,558	-18,189
Personal Services	344,919	255,005	-89,914
Clothing & Apparel	417,890	361,678	-56,212
Footwear	144,660	33,741	-110,919
Jewelry & Accessories	48,609	44,904	-3,705
Health & Beauty	103,975	87,997	-15,978
Home Furniture & Décor	224,480	127,204	-97,276
Home Electronics & Appliances	449,095	308,322	-140,773
Home Improvement & Gardening	318,148	267,445	-50,703
Books & Media	226,911	18,094	-208,816
Sporting Goods	77,107	131,015	53,908
Toys & Hobbies	70,523	40,268	-30,255
Specialty Retail	128,623	284,053	155,430
Quick Service F&B	38,741	200,227	161,486
Full Service Restaurants	244,954	176,070	-68,884
Arts & Entertainment	340,657	136,000	-204,657
Drinking Establishments	28,759	25,114	-3,645
Fitness & Leisure	148,961	81,105	-67,856
Auto Parts & Accessories	83,539	177,918	94,379
Auto/RV/Motorsports Dealerships	957,459	434,950	-522,509
TOTAL RETAIL CATEGORIES ONLY	**5,423,453**	**3,985,880**	**-1,437,573**
	Including Vacant space	**414,961**	**-1,022,612**

Given tenant demands and economic realities in conjunction with new population growth, it is not inconceivable to suggest that 500,000 sf of new space could be accommodated in new and existing nodes in the city over the next decade. This would result in a stabilized per capita space ratio of approximately 56 sf.

5.3 RETAIL GAP ANALYSIS QUANTIFICATION

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

The process for calculating retail surplus/inflow involves estimating the current annual retail sales for each respective merchandise category in the City of Grande Prairie.

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

Table 5.8 and Figure 5.1 illustrate the Retail Gap Analysis on a category-by-category basis for the City of Grande Prairie.

Unlike most markets in which outflow is clearly evident, in the case of Grande Prairie the regional nature of the market is yet again substantiated by the magnitude of inflow and retention of spending, whereby only a few retail categories indicate potential outflow.

5.4 RETAIL INFLOW & OUTFLOW

Key Planning Strategies utilized a methodology 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 the retail sector in Grande Prairie and the demand (spending by households) within the same retail sector.

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

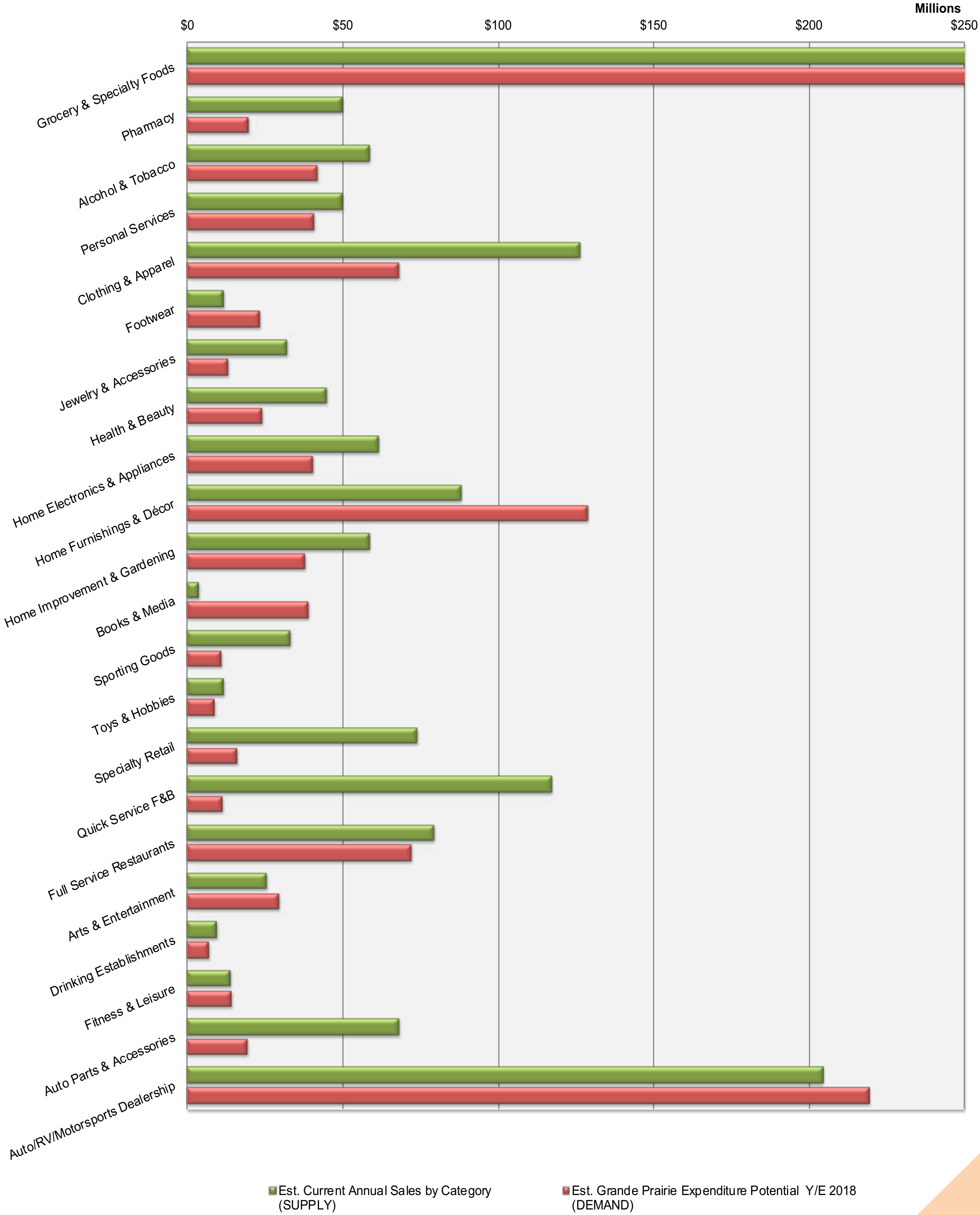
Outflow (sometimes referred to as Leakage) in an area represents a condition whereby a market's supply is less than the demand. In other words, retailers outside the market area are fulfilling the demand for retail products and thus demand is outflowing or leaking out of the normal or Primary Trade Area.

Table 5.8 reveals a pattern of spending that again clearly substantiates the idea that the City of Grande Prairie is a significant regional market that extends well beyond its own city limits.

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

FIGURE 5.1

CITY OF GRANDE PRAIRIE RETAIL SPENDING SUPPLY AND DEMAND



$446 million

ESTIMATED NET INFLOW OF RETAIL SALES (2018 Y/E EST)

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 Grande Prairie however, **Table 5.8** reveals a pattern in which 3 categories exhibit noticeable sales outflow.

These categories include:

Books & Multi-Media: Outflow Factor -81.4
Footwear: Outflow Factor -32.5
Home Furnishings: Outflow Factor -18.8

All other categories indicate marginal outflow or positive surplus factors, in many cases above 30.0, suggesting very strong inflow dynamics.

While a market that shows leakage indicates areas of weakness and opportunity, it can also be said that a market with significant inflow is even more poignant in that retailers can have the confidence in knowing that demand is already present in a market. In the case of Grande Prairie, inflow is a much bigger benefit than outflow.

TABLE 5.8

RETAIL INFLOW / OUTFLOW ESTIMATES

Merchandise Category	Est. Current Annual Sales by Category (SUPPLY)	Est. Grande Prairie Expenditure Potential Y/E 2018 (DEMAND)	Grande Prairie Outflow / Inflow Estimates	Grande Prairie Outflow / Inflow Factor
Grocery & Specialty Foods	$376,310,099	$266,010,299	$110,299,800	17.2
Pharmacy	$50,304,000	$19,889,604	$30,414,396	43.3
Alcohol & Tobacco	$58,894,125	$42,015,473	$16,878,652	16.7
Personal Services	$50,179,300	$41,042,040	$9,137,260	10.0
Clothing & Apparel	$126,634,343	$68,350,782	$58,283,561	29.9
Footwear	$12,088,546	$23,704,409	-$11,615,863	-32.5
Jewelry & Accessories	$32,248,375	$13,338,663	$18,909,712	41.5
Health & Beauty	$44,960,288	$24,335,825	$20,624,463	29.8
Home Electronics & Appliances	$61,697,081	$40,805,259	$20,891,822	20.4
Home Furnishings & Décor	$88,245,850	$129,177,190	-$40,931,340	-18.8
Home Improvement & Gardening	$58,965,750	$37,990,196	$20,975,554	21.6
Books & Media	$4,009,210	$39,121,483	-$35,112,273	-81.4
Sporting Goods	$33,348,815	$11,207,634	$22,141,181	49.7
Toys & Hobbies	$11,880,969	$9,155,532	$2,725,437	13.0
Specialty Retail	$74,289,638	$16,522,052	$57,767,586	63.6
Quick Service F&B	$117,236,763	$11,681,196	$105,555,567	81.9
Full Service Restaurants	$79,599,845	$72,297,132	$7,302,713	4.8
Arts & Entertainment	$25,681,250	$29,860,715	-$4,179,465	-7.5
Drinking Establishments	$9,695,600	$7,103,430	$2,592,170	15.4
Fitness & Leisure	$14,097,125	$14,601,495	-$504,370	-1.8
Auto Parts & Accessories	$68,500,504	$19,705,441	$48,795,063	55.3
Auto/RV/Motorsports Dealership	$204,699,375	$219,495,987	-$14,796,612	-3.5
VACANT	$0			
TOTAL	**$1,603,566,849**	**$1,157,411,837**	**$446,155,012**	**16.2**

6 CONSUMER INTERCEPT SURVEY

6.1 INTRODUCTION

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

Respondents were interviewed at strategic locations in the community (Prairie Mall and Eastlink Recreation Centre) to ascertain their preferences for merchandise categories/store types and retailers in the City of Grande Prairie. 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%. Utilizing the Statistical Package for the Social Sciences (SPSS) the data has been prepared in correlation with the study's objectives.

The questionnaire tool is shown as **Figure 6.3**, while the complete Consumer Intercept Survey results comparing 2016 results with 2013/2014 results are provided in **Appendix B.**

6.2 RESPONDENT RESIDENCE

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 of 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 72% of respondents currently live in the City of Grande Prairie, with a further 6% living in the County of Grande Prairie, and the remaining from communities outside of the County, including British Columbia. Since 2016, there has been a shift to a more concentrated retention of patronage from within the City (65% of respondents in 2016).

Furthermore, **Figures 6.2, 6.3 & 6.4** illustrate in a heat map format the density by 6-digit postal code) from which Survey Respondents originated.

The heat map clearly illustrates a consistent pattern with the Retail Trade Area documented in **Figure 4.1**, in which the majority of patronage is sourced to the City and surrounding towns, but emanates westward into Northeastern British Columbia and north into Northern Alberta, with less dependence to the east and south.

6.3 PREFERRED SHOPPING LOCATIONS

Consumer Survey respondents were specifically asked the following questions pertaining to their current shopping habits in which some tables provide a comparison of consumer survey responses in 2014, 2016 and 2019:

FIGURE 6.1

CONSUMER SURVEY RESPONDENTS RESIDENCE OF ORIGIN

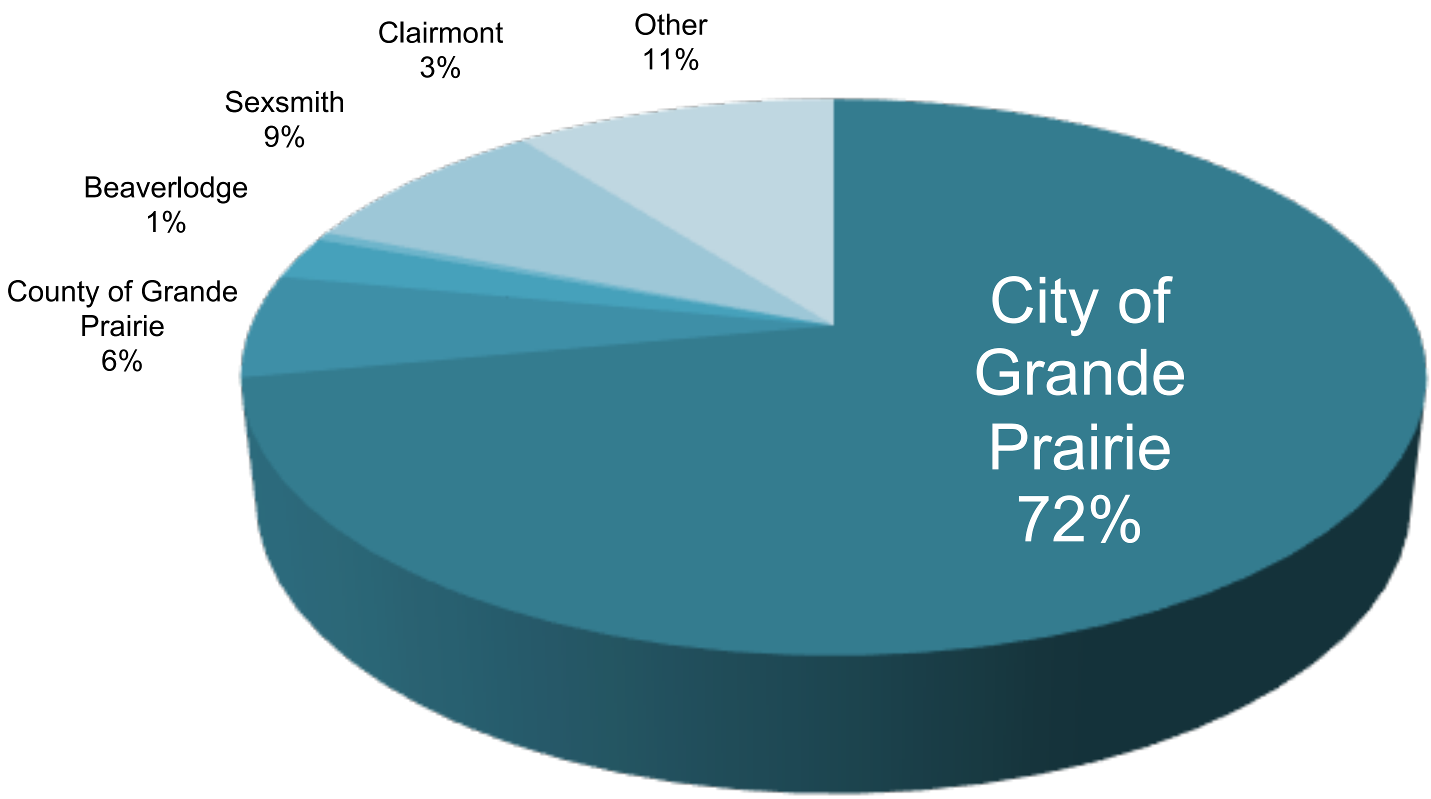
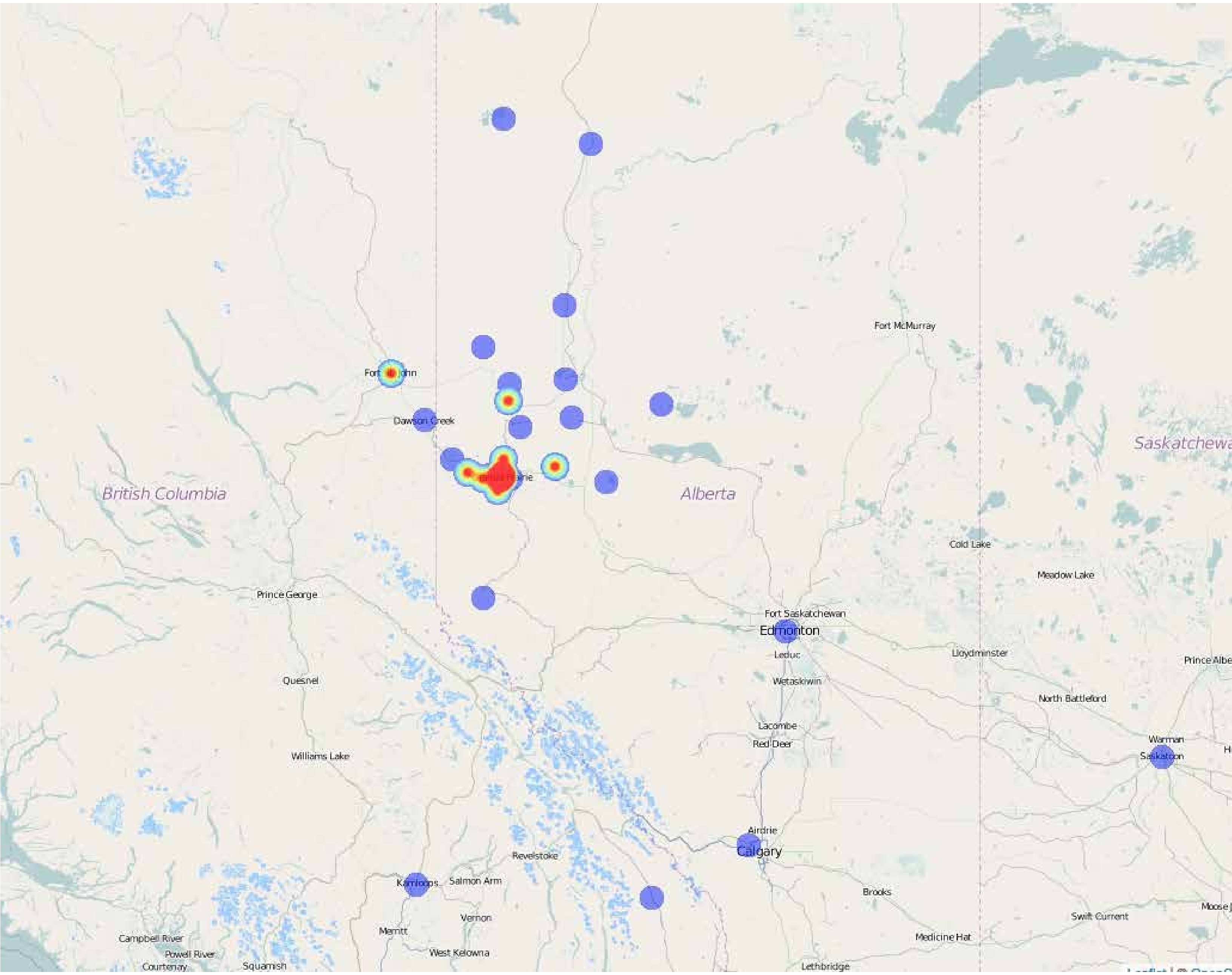


FIGURE 6.2

CONSUMER SURVEY RESPONDENT FULL AREA "HEAT MAP" BY POSTAL CODE (6 digit postal code)



- 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 Grande Prairie?
- What do you dislike the most about the shopping opportunities in Grande Prairie?

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.

Primary Convenience Shopping Centre

Figures 6.5 and 6.6 indicate that the Real Canadian Superstore continues to be 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 the RCSS is close to their primary residence and allows for one-stop-shopping.

The Safeway location in the North has lost ground, which may be attributed to the recent relocation of Canadian Tire to the west side, while the Safeway South location has gained potential patronage likely as at the expense of Fresons in the south, which is closing its location. No Frills at South 40 has been the one convenience node that has continued to increase its market share in correlation with the successful leasing of the South 40 retail node.

COSTCO is a stable 2nd among respondents and is a very strong tenant for both conveniences and comparison merchandise and is one of the single biggest regional draws.

Overwhelmingly, people choose to shop at a convenience shopping node for the prices and proximity to their residence, while selection of products also ranks as important to consumers.

Primary Comparison Shopping Centre

Figures 6.7 and 6.8 illustrate that Prairie Mall, Wal-Mart and Westgate are the most dominant 'bricks and mortar' shopping centres for consumers looking for comparison merchandise, such as Clothing, Footwear, Books, Electronics, House & Home etc.

However, other destinations outside of the city including Online purchasing has gained more prominence in the City.

In particular, the continued growth of the west side of the City lead to this area becoming well-entrenched as a preferred location for consumers. As in previous surveys though, the Prairie Mall continues to be the most preferred shopping destination, where recent renovations have no doubt helped attract high value tenants to the market and further bolster the mall's appeal.

In terms of the reasons for shopping at an identified Comparison shopping location, the fact that they are close to home and have easy access resonate well with the majority of the respondents who, 72% of which as noted live in the City.

FIGURE 6.3

CONSUMER SURVEY RESPONDENT TRADE AREA "HEAT MAP" BY POSTAL CODE

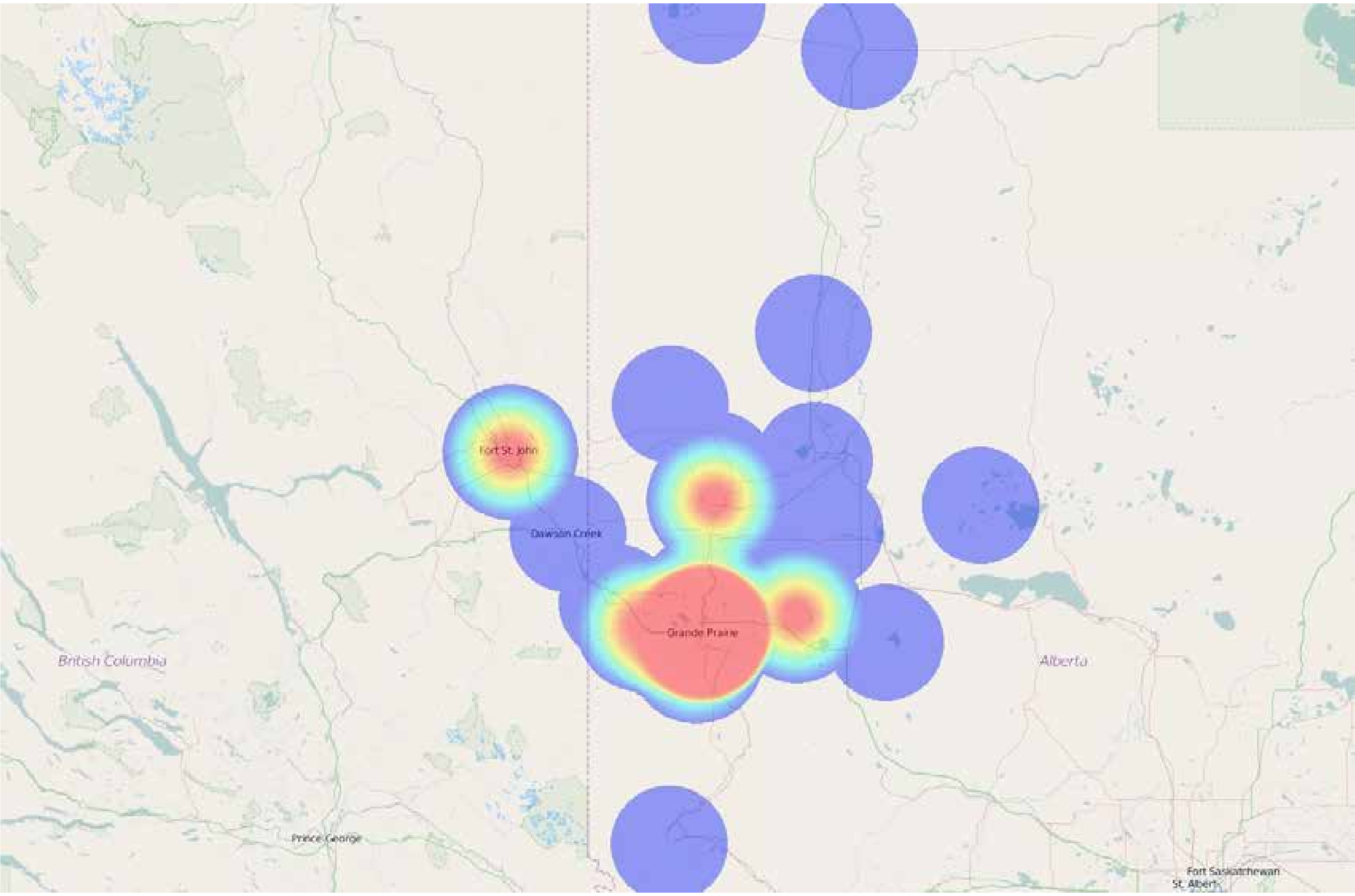


FIGURE 6.4

CONSUMER SURVEY RESPONDENT TRADE AREA ZOOM-IN "HEAT MAP" BY POSTAL CODE

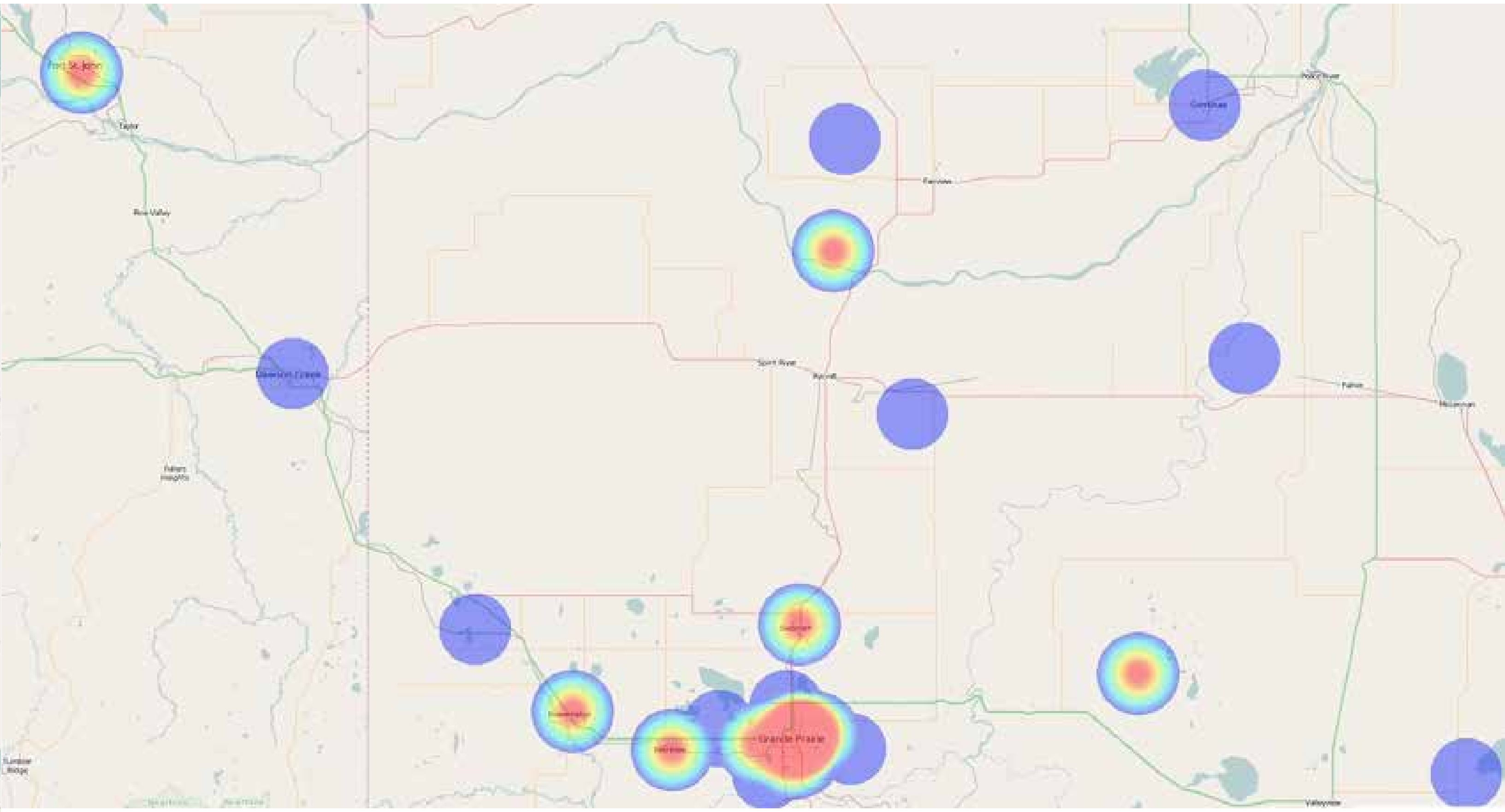
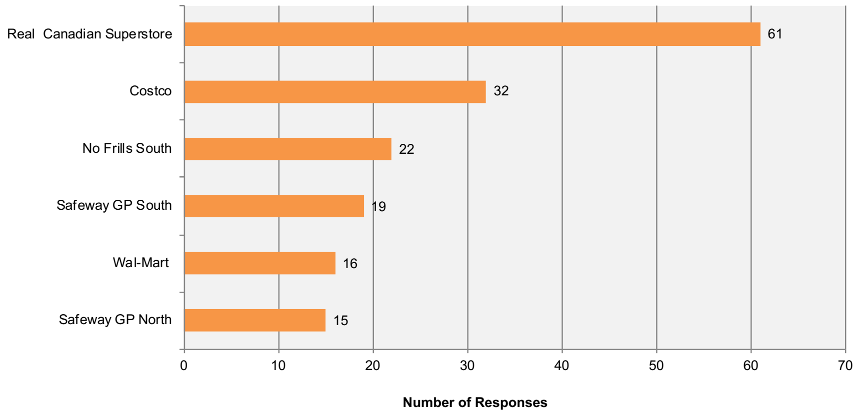
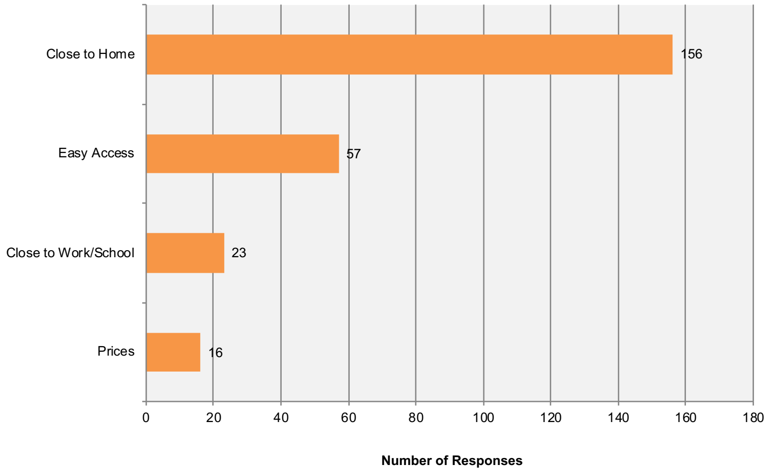


FIGURE 6.5
WHAT IS YOUR PRIMARY CONVENIENCE SHOPPING CENTRE?



Q1A: Primay Convenience SC	2019	2016	2014
Real Canadian Superstore	61	58	40
Costco	32	36	32
No Frills South	22	16	12
Safeway GP South	19	12	29
Wal-Mart	16	15	16
Safeway GP North	15	26	22
Other	11	6	19
COOP Downtown	8	6	5
Save On Foods	6	7	15
No Primary Convenience	4	6	2
Fresons South	2	5	4
Fresons North	2	5	4
Giant Tiger	2	2	0
Total	**200**	**200**	**200**

FIGURE 6.6
WHAT IS YOUR PRIMARY REASON FOR CHOOSING A CONVENIENCE SHOPPING CENTRE?



Q1C: Reasons for Primary Convenience SC	2019	2016	2014
Close to Home	156	66	95
Easy Access	57	7	3
Close to Work/School	23	10	2
Prices	16	94	88
Sales Promos	12	34	34
Quality Products	11	29	41
Specific Item/Brand/Store	8	36	6
Support Local	6	1	7
Selection of Products/Stores	5	49	33
Meets Needs	5	10	8
Parking	5	2	2
No Taxes	5	0	0
Buy in Bulk	3	24	12
No Specific Reason	3	0	0
Proximity to Other Areas	3	0	0
Familiarity	2	52	43
Hours of Operation	2	1	2
Daty Out - Window Shop	2	0	0
Stores Clustered	2	0	0
One Stop Shop	1	32	41
Customer Service	1	23	11
In the Area	1	2	0
Not Crowded	1	1	1
Convenience Items	0	0	5
Clothing	0	0	1
Quality of Stores	0	0	4
Total	**330**	**473**	**439**

This certainly doesn't preclude the regional accessibility that both Westgate and Prairie Mall have at the major entry points to the City. Interestingly, the specific category of "Shoes" made a strong appearance in the surveys, which speaks well to a category that in past surveys was considered lacking.

Overall, the retail inflow and outflow identified previously clearly illustrates that consumers have a strong willingness to visit Grande Prairie for their Convenience and Comparison goods and services.

This trend combined with the population and spending dynamics reinforces the opportunity for Grande Prairie to target and attract many tenants that are found in more metropolitan markets, but for whom the Grande Prairie demographics is a strong and compatible fit.

Given the price consciousness of the respondents, Grande Prairie could attract price points and broader market appeal tenants. For example, tenants such as H&M, Uniqlo, Aritzia, Muji, Mountain Warehouse, Jack & Jones may be well-served by the opportunity.

The Prairie Mall's recent repositioning in 2018 has been highly successful in attracting previously desired tenants such as Marshall's, Lululemon, Saje, Starbucks and Urban Planet. There are still some very strong tenant spaces adjacent to these recent additions that should be very appealing to the previously highlighted tenants.

Figure 6.12 and the detailed full response in **Appendix C** illustrates a range of tenants that the mall could target that fit the Grande Prairie Market profile.

Restaurant brands like Olive Garden, Red Lobster or Old Spaghetti Factory who have been long sought in the City and who have broad market appeal, should be made more aware of the evolution of Grande Prairie's bustling retail market, spending capacity and youthful demographic, as well as prime locations. Similarly, a format like Cactus Club though typically seeking a higher profile major urban location may soon be on the lookout for markets with youthful and well-educated patrons and for whom the Grande Prairie Market could represent a potential target.

6.4 LIKES & DISLIKES OF RETAIL IN GRANDE PRAIRIE

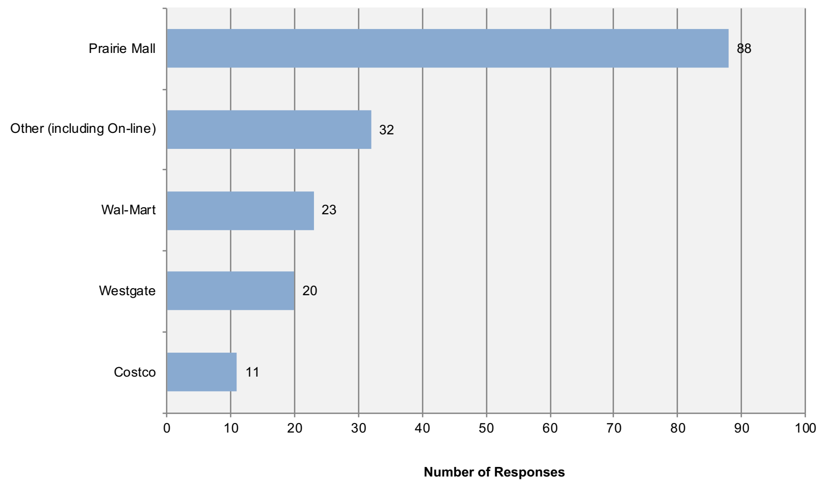
Figures 6.9 and 6.10 highlight the "likes" and "dislikes" of the respondents as it relates to the current shopping opportunities in Grande Prairie.

Overwhelmingly, respondents like the influx of new stores, which has created a natural tendency to also like the overall selection of stores. In fact, the number of respondents that indicated a dislike for the selection of stores in continued to decline in 2019 compared to 2016 and 2014, thus indicating the continued success of new projects such as Westgate and South 40, as well as the successful repositioning of the Prairie Mall.

The aspirational attributes of the Grande Prairie consumer continue to be teased, whereby 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. Examples are indicated in **Figures 6.9 through 6.13** and include shops that could locate in Power Centre and/or Enclosed Mall formats.

FIGURE 6.7

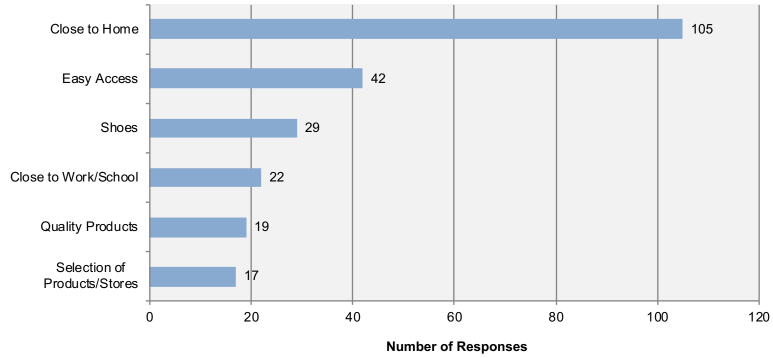
WHAT IS YOUR PRIMARY COMPARISON SHOPPING CENTRE?



Q2A: Primary Comparison SC	2019	2016	2014
Prairie Mall	88	77	89
Other (including On-line)	32	27	33
Wal-Mart	23	32	26
Westgate	20	26	9
Costco	11	17	21
No Primary Comparison	8	18	10
Downtown	8	0	3
Real Canadian Superstore	3	2	3
Gateway	3	1	2
Canadian Tire	2	0	4
Towne Centre Mall	2	0	0
Total	**200**	**200**	**200**

FIGURE 6.8

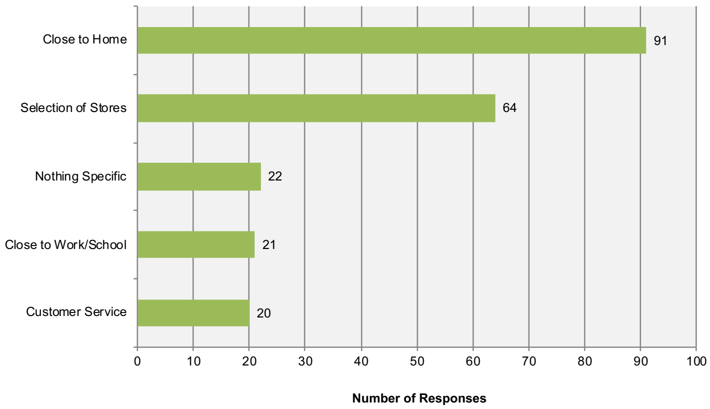
WHAT IS YOUR PRIMARY REASON FOR CHOOSING A COMPARISON SHOPPING CENTRE?



Q2C: Reasons for Primary Comparison SC	2019	2016	2014
Close to Home	105	7	27
Easy Access	42	8	3
Shoes	29	0	2
Close to Work/School	22	9	5
Quality Products	19	5	13
Selection of Products/Stores	17	135	108
Prices	13	63	65
Sales Promos	12	28	13
Stores Clustered	12	1	0
No Taxes	12	0	1
One StopShop	7	55	51
Clothing	7	22	13
Meets Needs	7	18	19
Specific Item/Brand	6	38	7
Support Local	5	2	4
Buy in Bulk	5	1	4
Gifts	3	0	4
Shop Specific Store	2	35	18
Proximity to Other Areas	2	1	0
Parking	2	0	6
Comparison Items	2	0	3
Quality of Stores	2	0	4
Department Stores	2	0	3
Familiarity	1	7	16
Day Out/Window Shop	1	5	10
Customer Service	0	8	5
In the Area	0	3	1
Not Crowded	0	2	4
Hours of Operation	0	0	3
Total	**337**	**453**	**412**

FIGURE 6.9

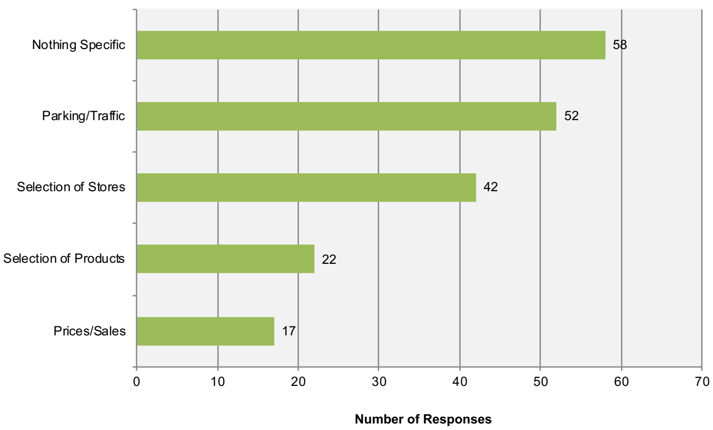
WHAT DO YOU LIKE MOST ABOUT SHOPPING IN GRANDE PRAIRIE?



Q20: Like Most About Shopping Opportunities in Grande Prairie	2019	2016	2014
Close to Home	91	15	43
Selection of Stores	64	62	73
Nothing Specific	22	9	5
Close to Work/School	21	0	1
Customer Service	20	28	13
Easy Access	16	35	22
One Stop Shop	15	2	7
Selection of Products	15	0	0
Parking/Traffic	14	2	7
Prices Sales	12	24	42
Support Local & Community Oriented	11	13	15
Meets Needs	10	55	48
Proximity to other Areas/Stores	10	47	39
Like New Stores	8	64	58
Like Specific Store	6	11	32
Variety of Fast Food	5	0	0
Familiarity	4	2	9
Not Crowded	2	6	7
In Stock	1	0	3
No need to leave Grande Prairie	0	22	0
Like Downtown Stores	0	15	0
Selection of Restaurants	0	8	1
Entertainment	0	7	1
Transit	0	5	0
No Tax	0	3	8
Professional/Personal Services	0	2	0
Hours of Operation	0	1	1
Deparmtent Stores	0	0	1
Quality of Stores	0	0	1
Total	**347**	**438**	**437**

FIGURE 6.10

WHAT DO YOU DISLIKE MOST ABOUT SHOPPING IN GRANDE PRAIRIE?



Q21: Dislike Most About Shopping Opportunities in Grande Prairie	2019	2016	2014
Nothing Specific	58	44	30
Parking/Traffic	52	39	47
Selection of Stores	42	10	75
Selection of Products	22	0	4
Prices/Sales	17	29	21
Customer Service	12	21	35
Access	9	2	5
Does Not Meet Needs	8	0	0
Not in Stock	5	4	6
Missing Specific Store	4	63	17
Hours of Operation	4	2	6
Not Pedestrian Friendly	3	3	10
Not Close to Home	3	0	0
Not Close to Work/School	3	0	0
Crowded	3	0	0
Dislike of New Stores/No Variety	2	1	0
Does Not Support Local/Community O	1	0	1
Lacks Overall Competition	0	25	0
Lacks Department Stores	0	14	1
Crowded	0	10	26
Lacks Stores/Activities Downtown	0	10	0
Entertainment	0	9	25
Road Conditions	0	5	0
Professional/Personal Services	0	3	12
Selection of Restaurants	0	2	21
Need Bigger Mall	0	2	1
Transit	0	1	0
Total	**248**	**299**	**343**

Overall the fact that respondents stated "nothing specific" for both likes and dislikes illustrates an overall acceptance with the offering in the City. Also, because much of this offering is now in the City, most respondents like the fact that they can access goods and services closer to their home, school or work.

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 Grande Prairie? (**Figure 6.11**)
2. What Full-Service Restaurants do you want to see in Grande Prairie (based on results from 2016 survey)? (**Figure 6.12**)
3. What Limited-Service Restaurants do you want to see in Grande Prairie (based on results from 2016 survey)? (**Figure 6.13**)
4. What Retail Stores do you want to see in Grande Prairie (based on results from 2016 survey)? (**Figure 6.14**)
5. What types of stores do you want to see in Grande Prairie (based on results from 2016 survey)? (**Figure 6.15**)

Referring to **Figure 6.11,** which allows for multiple responses (to a maximum of 5 each), respondents overwhelmingly want to see more Full-Service Restaurants (153 responses) comprising responses such as Family Restaurants, Locally Owned Restaurants, Ethnic Restaurants and Upscale Dining, and Clothing & Footwear stores (67 responses). An increase in the quality and quantity of the above two categories would be well-received by the respondents and overall trade area residents as would a continued expansion of the variety of stores (124 responses). Entertainment comprising many forms is also desired by many residents, while lastly there is now emerging a much stronger desire to support and want Local Stores. This latter represents a significant increase from past surveys and is a natural reflection of Grande Prairie's growth whereby consumers can get overwhelmed by brands and feel a desire to support local, unique shops and services again.

In response to the desire to see more Full-Service Restaurants (i.e. those with table service) in Grande Prairie, **Figure 6.10** specifically asked respondents for tenant names. This question elicited significant responses for the following

Top 3:

1. *Red Lobster*
2. *Olive Garden*
3. *Montana's BBQ & Bar*

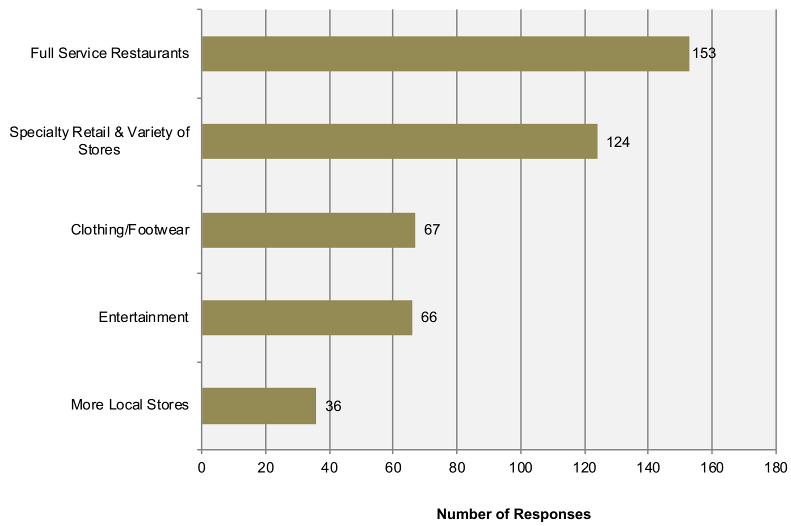
It is understood that Montana's has been actively examining the market over the past couple years and is currently seeking a Franchisee. Based on this reality, the next most cited responses were for Chili's, Old Spaghetti Factory and Cactus Club Cafe.

Full-Service Restaurants such as those identified, are most likely to locate in higher customer traffic and popular shopping areas and as such the West and North Sectors will be target locations for these types of tenants.

While Grande Prairie has a strong contingent of Limited Service Restaurants (i.e. those without table service), there was still a strong response indicated for more. What is most compelling from the responses is that other than Taco Bell, most people seek more ethnic diversity in the food offering as opposed to specific stores. This opens the door for entrepreneurial activity.

FIGURE 6.11

WHAT NEW STORES/SERVICES WOULD INCREASE YOUR SPENDING IN GP?



Q24: New Stores or Services to Increase Spending/Visits in Grande Prairie	2019	2016	2014
Full Service Restaurants	153	180	206
Specialty Retail & Variety of Stores	124	24	32
Clothing/Footwear	67	135	183
Entertainment	66	85	63
More Local Stores	36	11	0
Books & Toys	26	36	30
Family Friendly	21		
Nothing Specific	17	5	4
Personal Services	16	14	4
Grocery/Pharmacy	11	13	14
Coffee/Cafes/Fast Food	7	16	36
Professional/Financial Services	4	32	41
Traffic Safety	4		
Art Element	3		
Pet Supply Services	2	7	4
Pedestrian Friendly	2		
Facelift	2		
Sitting Area	2		
Parking	1		
Bike Friendly	1		
Sporting Goods & Hobbies		82	84
Department Store		58	12
Home Furnishings/Appliances		35	36
More Overall Competition		21	0
Electronics/Computers		17	7
Junior Box Outlet Store		10	6
Office Supply Items		8	6
Fitness Club/Day Spa		4	5
Bigger Mall		4	8
Improve Transit		3	0
Home Improvement & Garden		2	2
Automotive		2	10
Total	**565**	**804**	**793**

Photo: Kieron Hunt

Red Lobster Olive Garden & Montana's

CONTINUE TO BE MOST CITED RESTAURANTS DESIRED BY RESPONDENTS

FIGURE 6.12

WHAT FULL-SERVICE RESTAURANTS DO YOU WANT TO SEE IN GP? (2016 survey results)

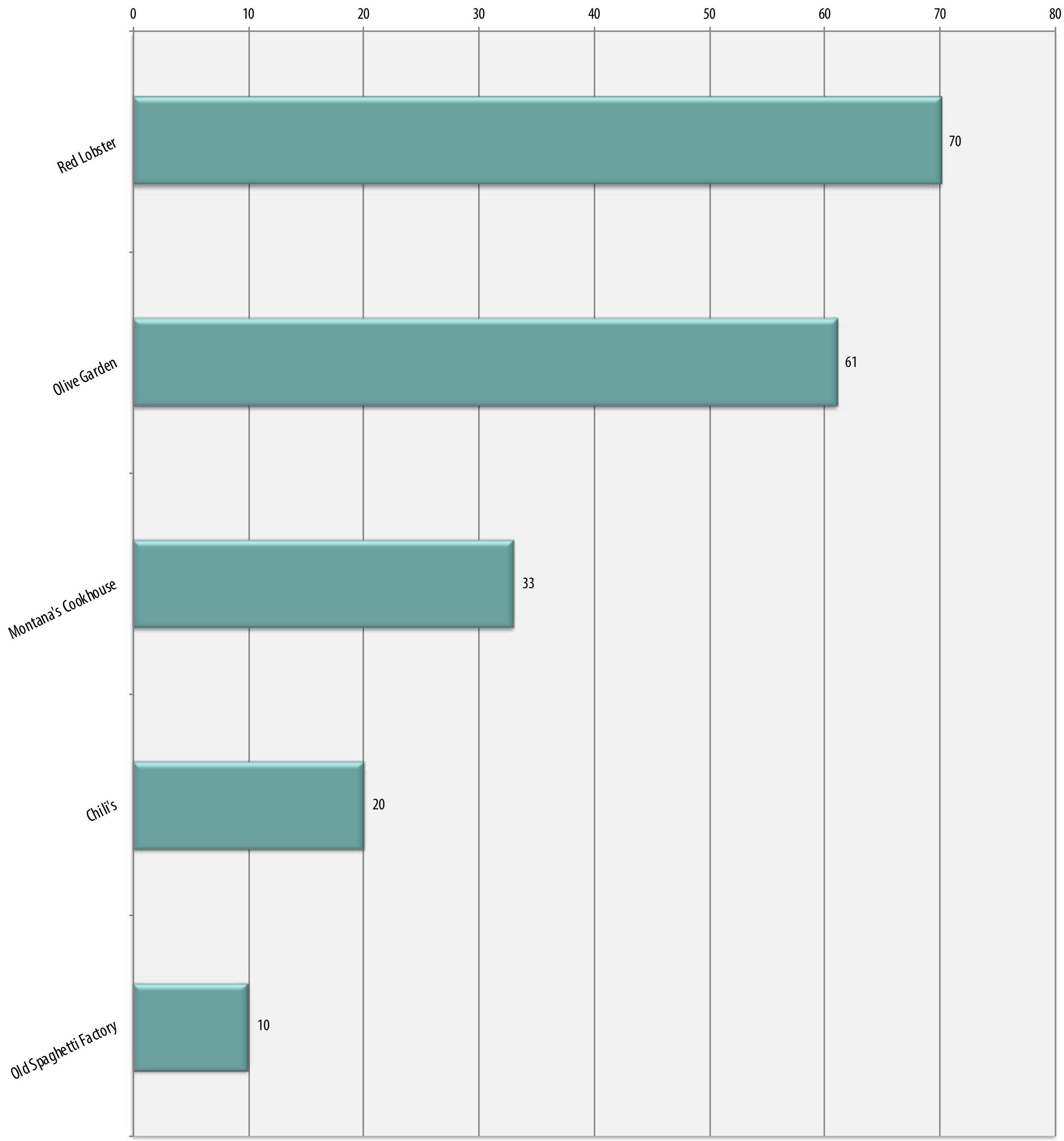
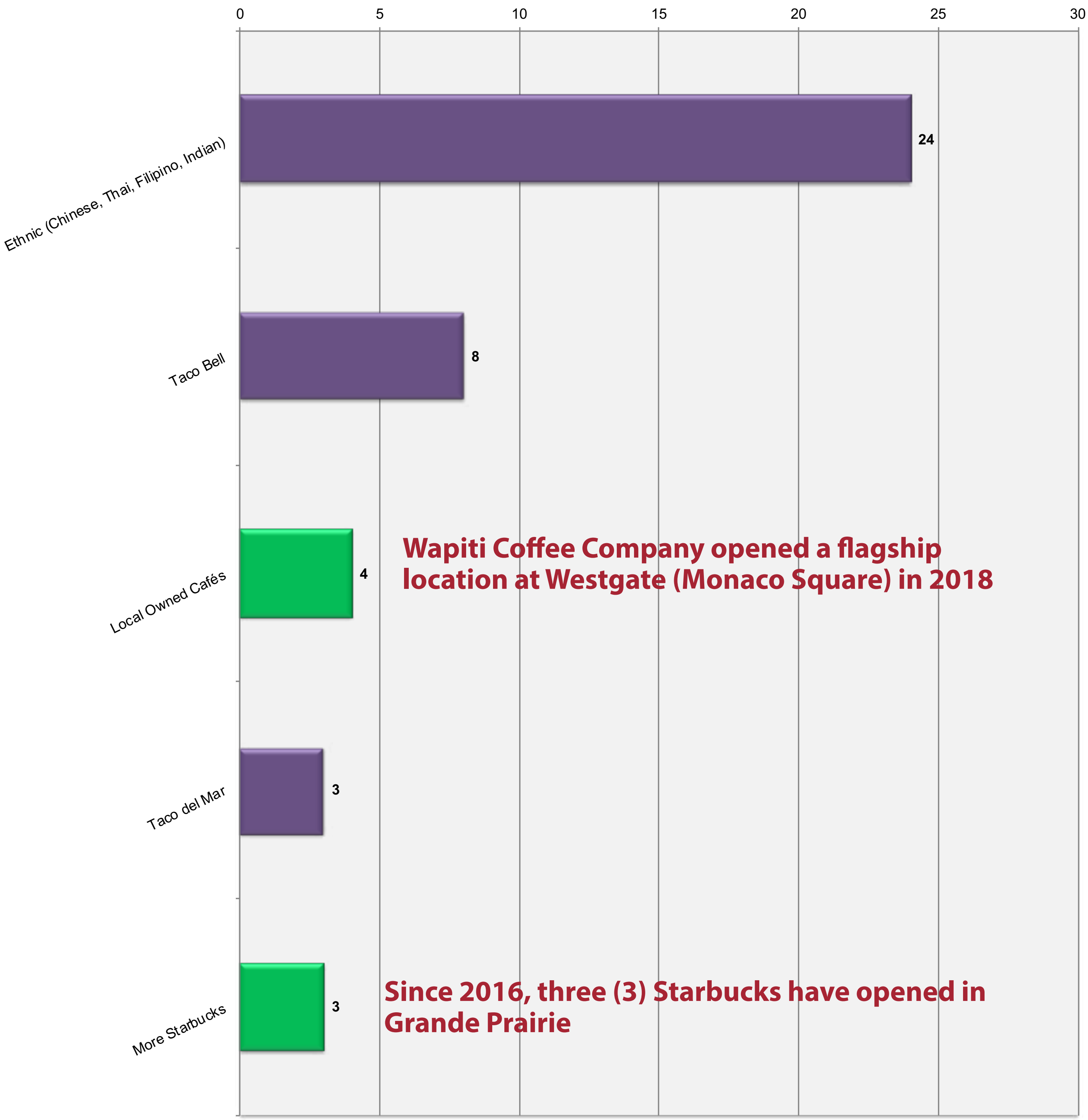


FIGURE 6.13

WHAT LIMITED-SERVICE RESTAURANTS DO YOU WANT TO SEE IN GP? (2016 survey results)



IKEA, INDIGO BOOKS & SPORT CHEK

CONTINUE TO BE MOST CITED RETAILER DESIRED BY SURVEY RESPONDENTS

FIGURE 6.14

WHAT RETAIL STORES DO YOU WANT TO SEE IN GP? (2016 survey results)

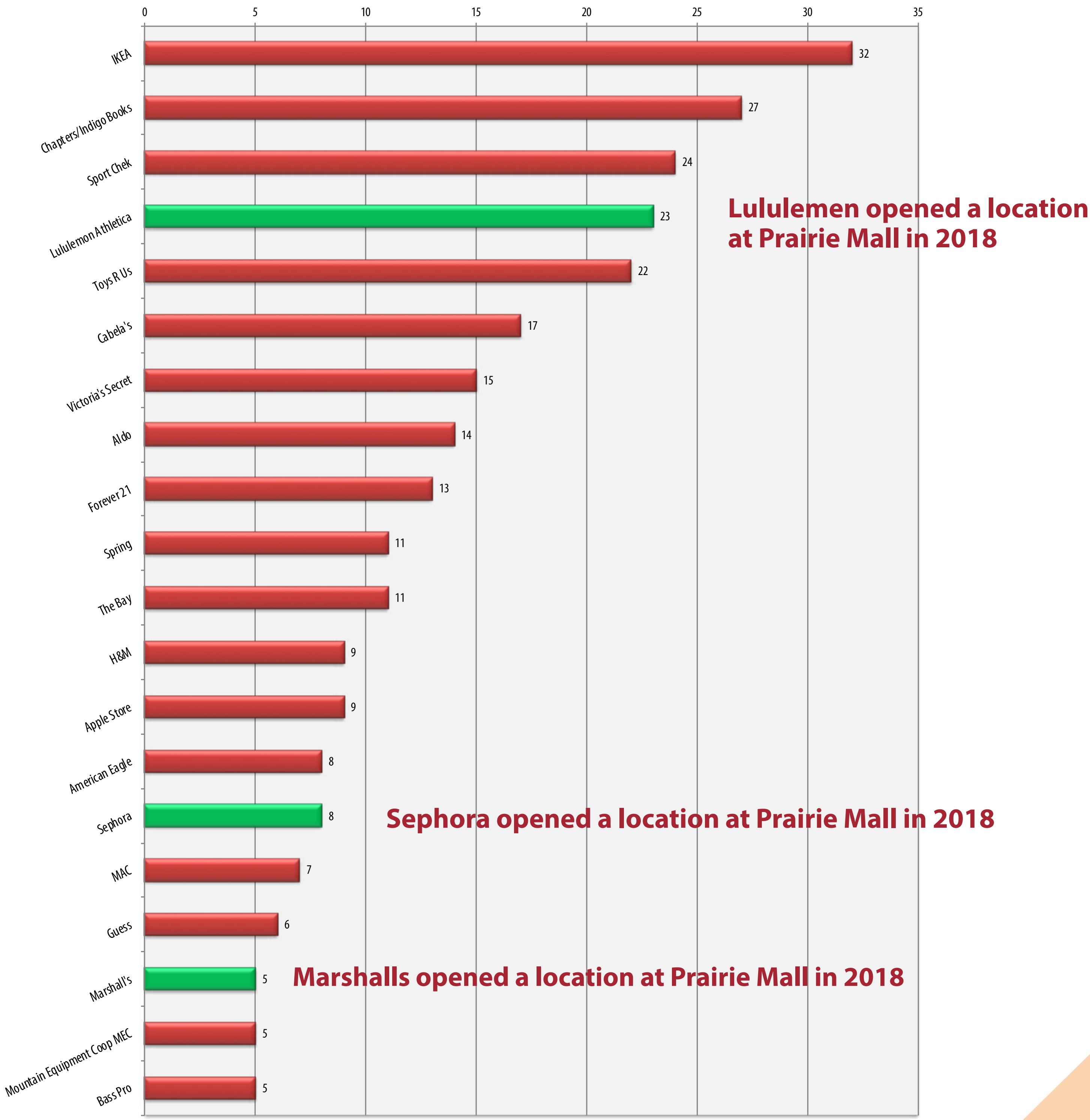
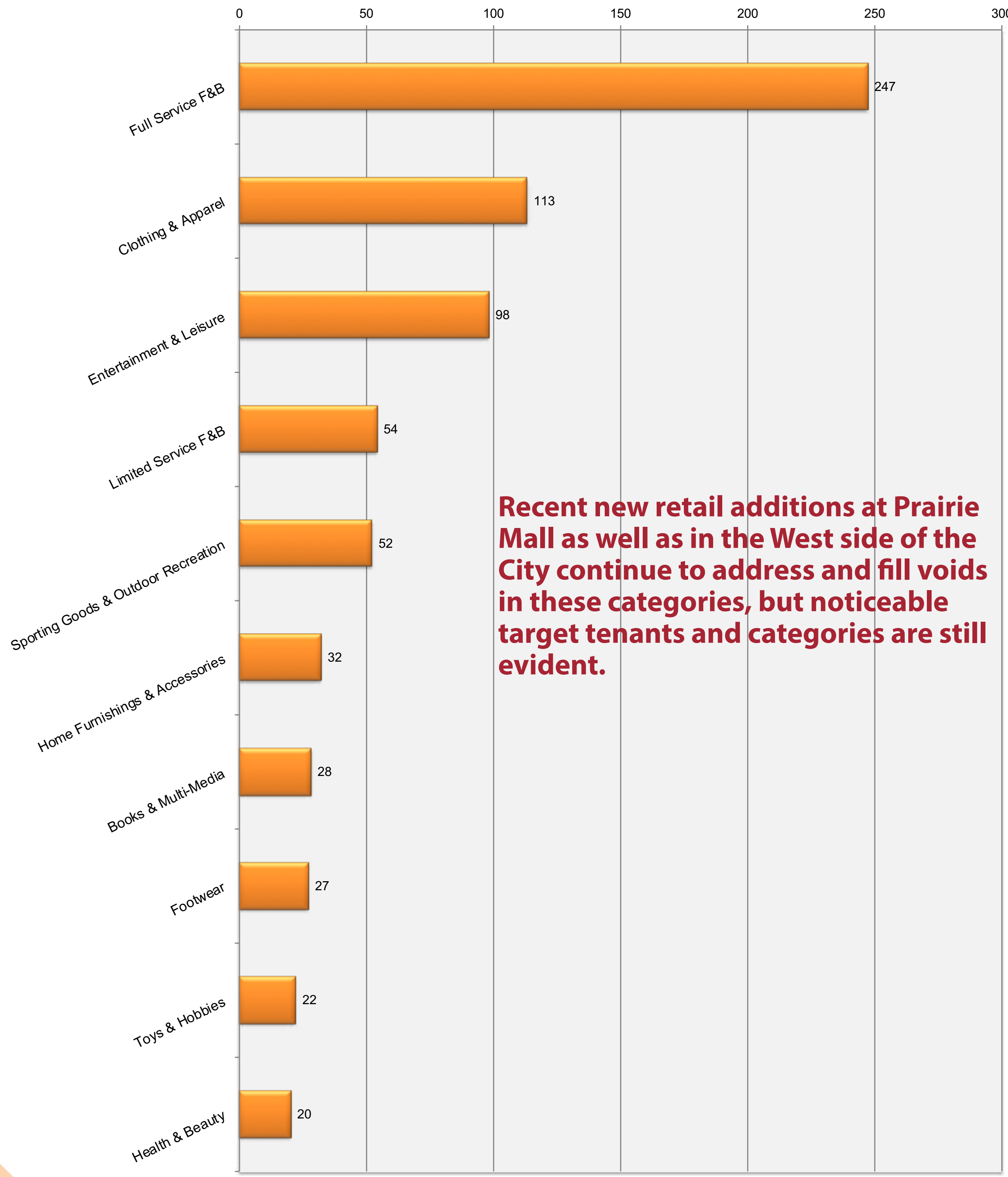


FIGURE 6.15

WHAT TYPES OF STORES DO YOU WANT TO SEE IN GP? (2016 survey results)



Recent new retail additions at Prairie Mall as well as in the West side of the City continue to address and fill voids in these categories, but noticeable target tenants and categories are still evident.

Local cafes and coffee shops continue to be in demand with optimal locations available throughout the city. Since 2016, Starbucks has made a strong entry into the market with multiple new store locations. Additionally, the Wapiti Coffee company opened a flagship roasting and coffee house at the Monaco Centre in the Westgate project.

Similarly, the Grande Prairie Coffee Co. located in the downtown has established itself as a strong draw with a loyal customer base. In downtowns such as Grande Prairie 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; Grande Prairie Coffee Company is but one example.

Figure 6.14 illustrated a desire for IKEA in 2016 and that sentiment still prevails in 2019. IKEA was developing a new "pickup" format in the range of 30,000 sf for regional Canadian locations, but their focus has shifted to smaller footprint urban stores. While a "pickup" format would be a strategic fit for Grande Prairie, the identification of IKEA is indicative of a desire to have more Home Furniture & Decor at a more broad price point. Another factor in play is that since 2016, online vendors such as Wayfair and Amazon have become very strong in the home decor market and as such, this may curtail some physical home furnishings tenants from the market and is a partial factor for IKEA's slow approach to the pickup format.

For retail stores such as American Eagle, Victoria's Secret or Forever 21 (referring to **Figure 6.14**), Prairie Mall continues to be the single best location in Grande Prairie to secure these highly desired fashion-oriented brands. As a result of the mall's recent reconfiguration and repositioning, it has been highly successful in attracting sought after brands like Urban Planet, Saje, Marshalls, Lululemon and Sephora; the last three of which were specifically noted as desired in the last survey in 2016. There are still some brands from the 2016 list that are worth pursuing such as H&M, Victoria's Secret, Aldo, American Eagle, Spring. New brands that also should be added to this list include Uniqlo and Muji.

6.6
ALL RESPONDENTS SPENDING VERSUS IMPORTANCE

Figures 6.16 to 6.22 take a more honed in approach in looking at the Consumer Responses by seeing where differences may exist in spending and importance ratings by Respondent Origin, Age Cohort and Household Income bracket.

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

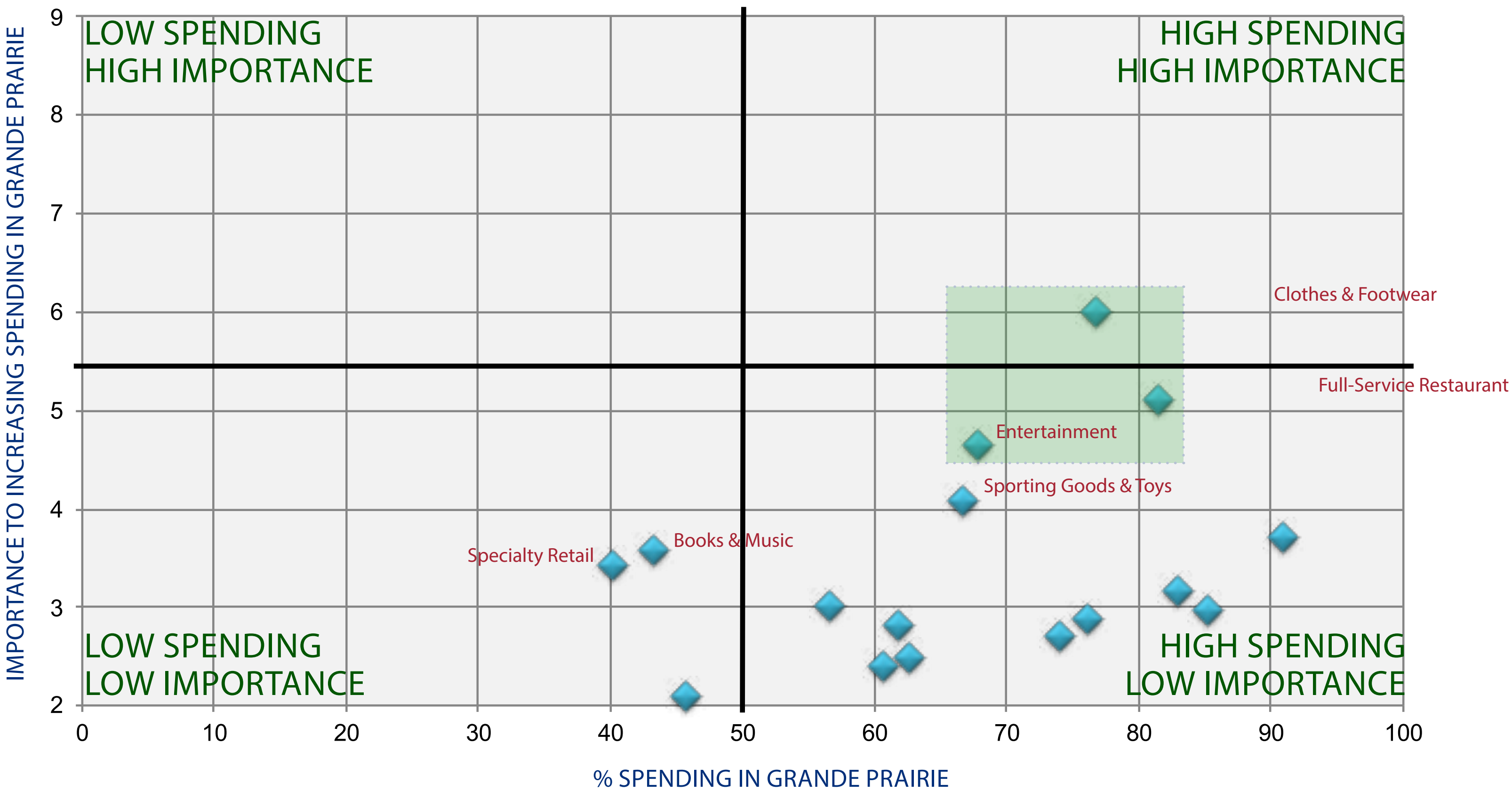
The results shown diagrammatically in **Figure 6.16** illustrates that categories comprising Full-Service Restaurants, Clothing & Footwear and Entertainment continue to have the highest spending by respondents, but also have the highest importance rating to increasing spending in the city.

Since 2016, the overall importance of having these categories has dropped, which is in part a reflection of the fact that some of these categories and desired tenants have been fulfilled (e.g. Marshalls, Lululemon etc).

To a lesser degree, categories like Home Furnishings, Sporting Goods, Books & Music and Specialty Retail have levels of spending that could be retained at better levels in the community.

FIGURE 6.16

SPENDING VERSUS IMPORTANCE RATINGS FOR ALL RESPONDENTS



RESTAURANTS
CLOTHING & FOOTWEAR
ENTERTAINMENT

MOST DESIRED RETAIL CATEGORIES BY CONSUMER RESPONDENTS

FIGURE 6.17

PERCENTAGE SPENDING IN GRANDE PRAIRIE BY RESPONDENT ORIGIN

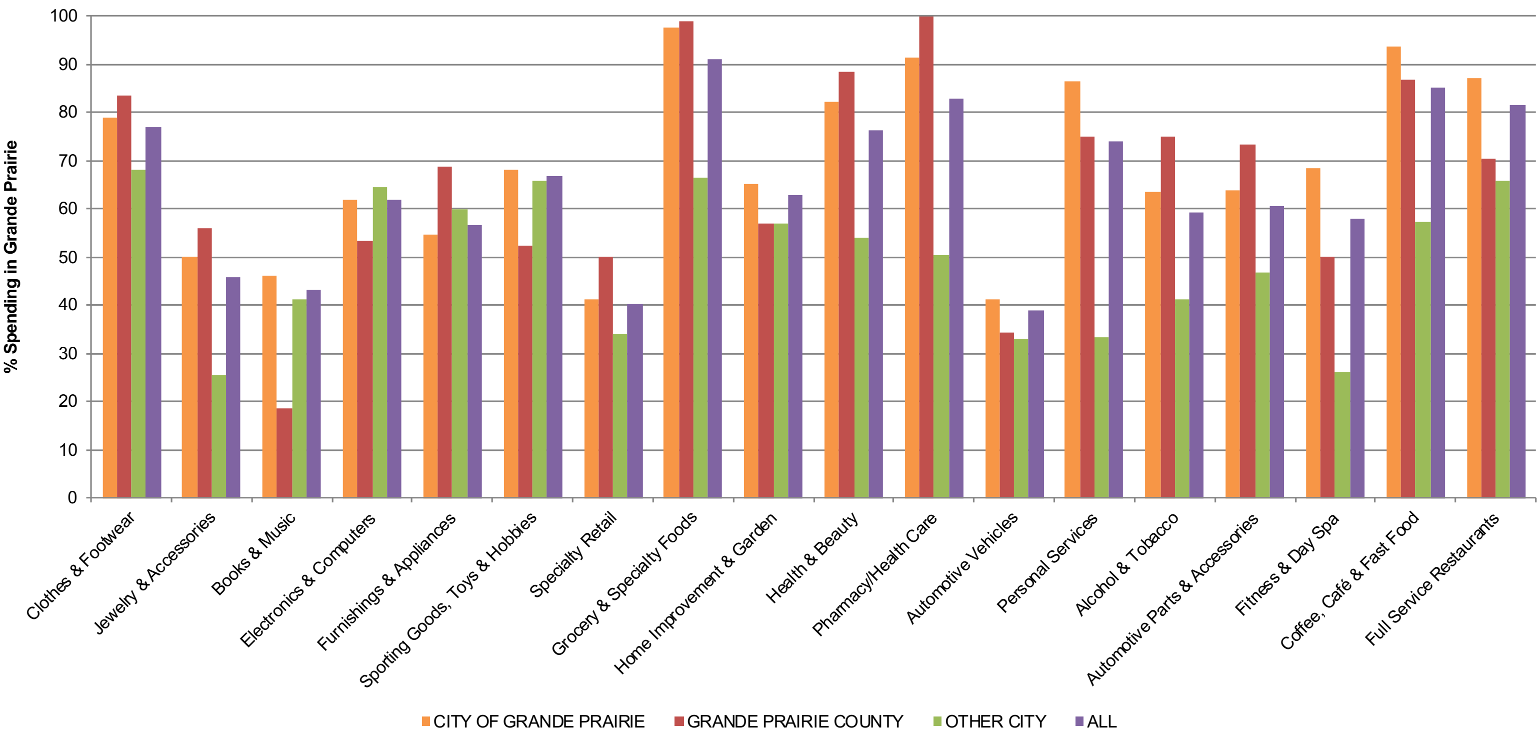
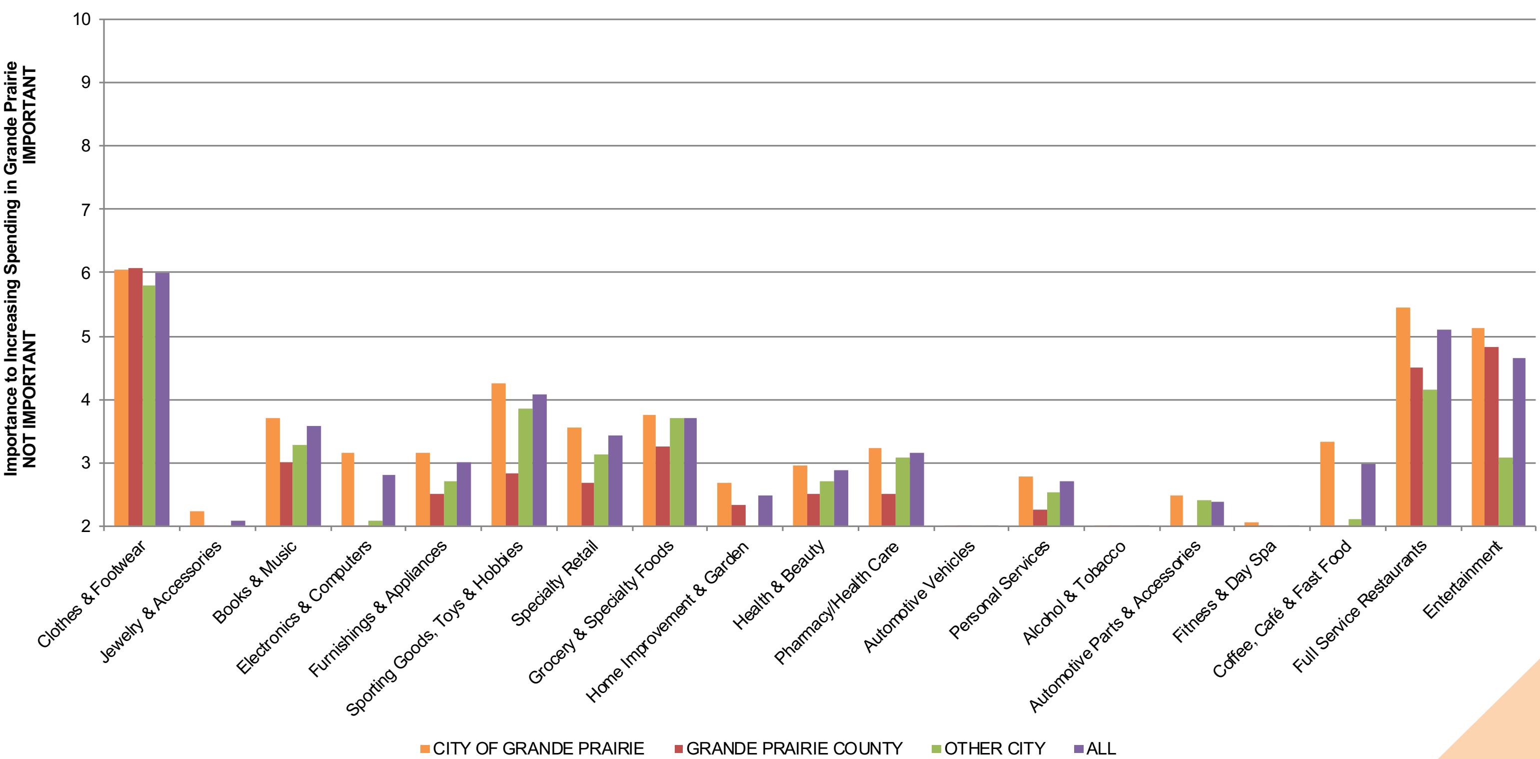


FIGURE 6.18

IMPORTANCE RATING TO INCREASE SPENDING BY RESPONDENT ORIGIN



Comparatively since 2016, Home Furnishings spending retention in Grande Prairie has increased. Their importance however isn't overwhelming as it is considered competitive with online businesses like Wayfair, Amazon etc.

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 Origin, 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 Grande Prairie a strategic fit in their store network development strategy.

Spending & Importance By Respondent Origin

Figures 6.17 & 6.18 illustrate the spending and importance ratings for respondents as broken down into the Respondent origin of residence:

- *City of Grande Prairie*
- *County of Grande Prairie*
- *Other City (beyond County of Grande Prairie)*

The figures illustrate that Grande Prairie County respondents contribute a significant share of retail spending in the City of Grande Prairie. In a survey of this nature, it is not surprising that the nearest area outside of the market area in which the survey was taken would have a strong spending profile. However, in the case of **Figure 6.17**, the amount of spending by Other City residents is quite healthy (more than 50% of spending) for categories such as Clothes & Footwear, Electronics & Appliances, Home Furnishings, Sporting Goods & Toys and Full Service Restaurants.

The regional-serving penetration of the City of Grande Prairie is further evidenced by Respondent spending which suggests that when customers from other cities come to Grande Prairie, they are drawn for comparison merchandise and often will shop and eat lunch and/or dinner in town.

The importance ratings to increasing spending in Grande Prairie illustrate that County of Grande Prairie residents in particular would spend more money in the City if there were more Fashion-oriented retailers and Full-Service Restaurants.

Brown's Social House, State & Main, Sawmill and Earl's have addressed this to some degree, though a restaurant like Olive Garden, Red Lobster, Chili's or perhaps audaciously Cactus Club would be extremely well-received by the regional market.

For residents of the City of Grande Prairie, an increase in the amount and/or quality of Entertainment, Fashion, Full Service Restaurants and Sporting Goods would go a long way in retaining and attracting even further spending. In particular, Sport Chek is a notable absence in the market that could capture not only Sporting Goods, but also athletic fashion and footwear. As noted in the following, this is an even more prominent desire for the younger demographic.

Spending & Importance By Respondent Age

Figures 6.19 & 6.20 illustrate the spending and importance ratings for respondents as broken down into the Respondent Age Cohort:

FIGURE 6.19

PERCENTAGE SPENDING IN GRANDE PRAIRIE BY RESPONDENT AGE COHORT

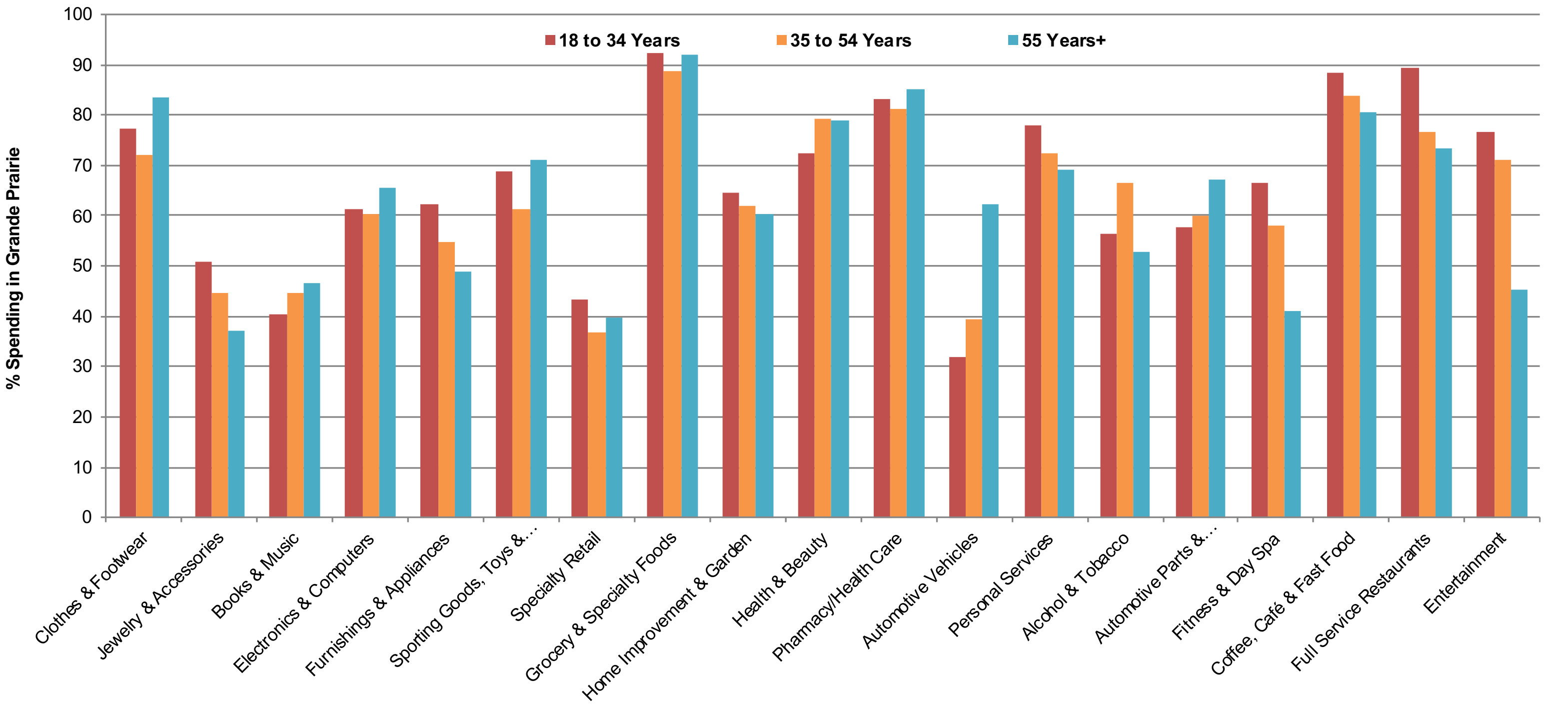
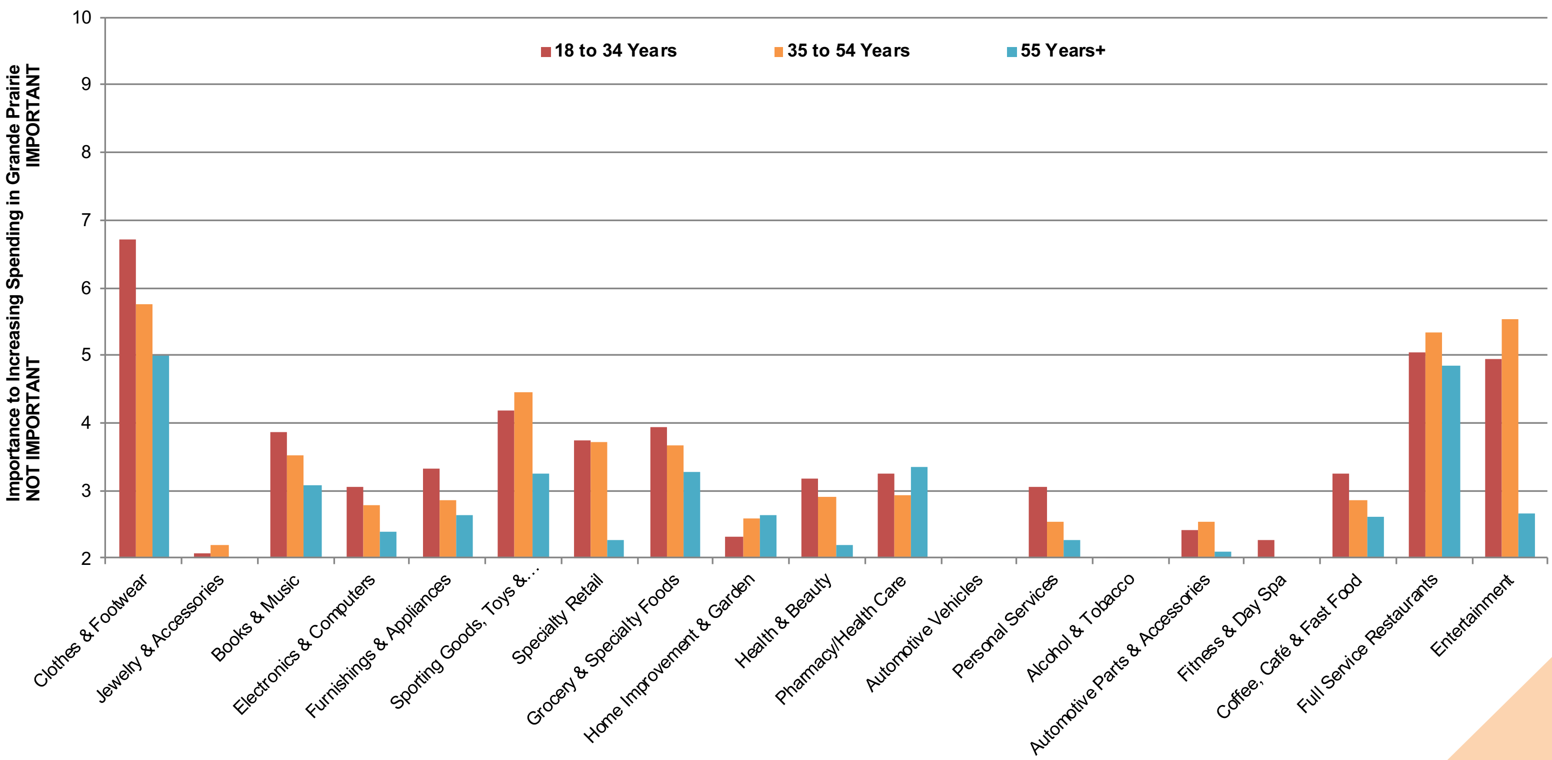


FIGURE 6.20

IMPORTANCE RATING TO INCREASE SPENDING BY 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, the Baby Boomers or those 55 years and older have the strongest spending profile for categories such as Clothing & Footwear, Automotive, Personal Services & Health Care and Grocery.

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 Grande Prairie, as evidenced by the average age at just over 31 years. Moreover, this pattern suggests that Baby Boomers are generally happy and satisfied with the offering in the City of Grande Prairie, while the emerging growth cohort are seeking new experiences and trendy formats to supplement their online spending attributes.

Secondly, and most importantly is the fact that the young family demographic, aged 35 - 54 years, has a strong income profile and is the market to which prospective tenants should pay attention. Their spending patterns while slightly below that of the Baby Boomers today is a faster growing segment and it is this segment who place a higher importance on increasing the amount, quality and diversity of Restaurants, Cafe's, Fashion, Specialty Retail and Entertainment.

Prospective retailers will realize the opportunity to cater to a market in which there are many more potential tenant opportunities. Specifically, those within the 35 – 55 year old age cohort are most likely to benefit from improvements in the retail offering in Grande Prairie. Categories for the active and leisure lifestyle such as Sporting Goods, Books & Music and Entertainment are high for the 18-34 and 35-54 year age cohorts.

These segments represents notable spending and a corresponding desire to have more Clothing, Restaurants, Entertainment and Sporting Goods. Retailers like Cactus Club, Olive Garden, Bier Market, Nandos, Sport Chek, MEC (Mountain Equipment Coop), Indigo, Uniqlo, H&M, Arc'teryx and Indochino typify the types of retailer that is sought after in the Grande Prairie market.

Similar to the 35 - 54 year old market, the 18 - 34 year old cohort is also a fast growing segment demographically and in terms of spending power.

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 Grande Prairie businesses, but equally are prepared to leave Grande Prairie or shop online, which continues to increase in popularity and convenience.

Spending & Importance By Respondent Household Income

Figures 6.21 & 6.22 illustrate the spending and importance ratings for respondents as broken down into the Respondent Household Income.

- *<$55,000*
- *$55,000 - $100,000*
- *>$100,000*

FIGURE 6.21

PERCENTAGE SPENDING IN GRANDE PRAIRIE BY RESPONDENT HOUSEHOLD INCOME

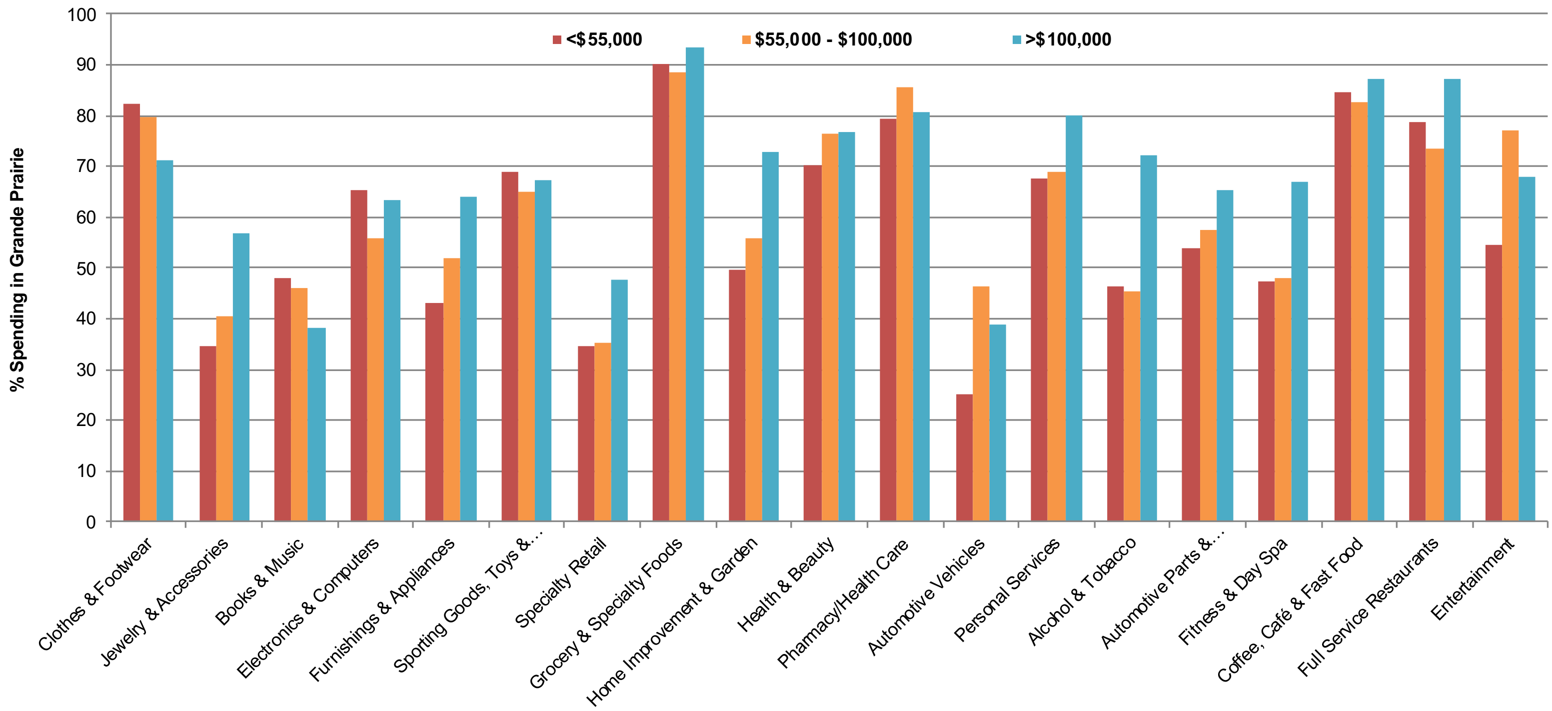
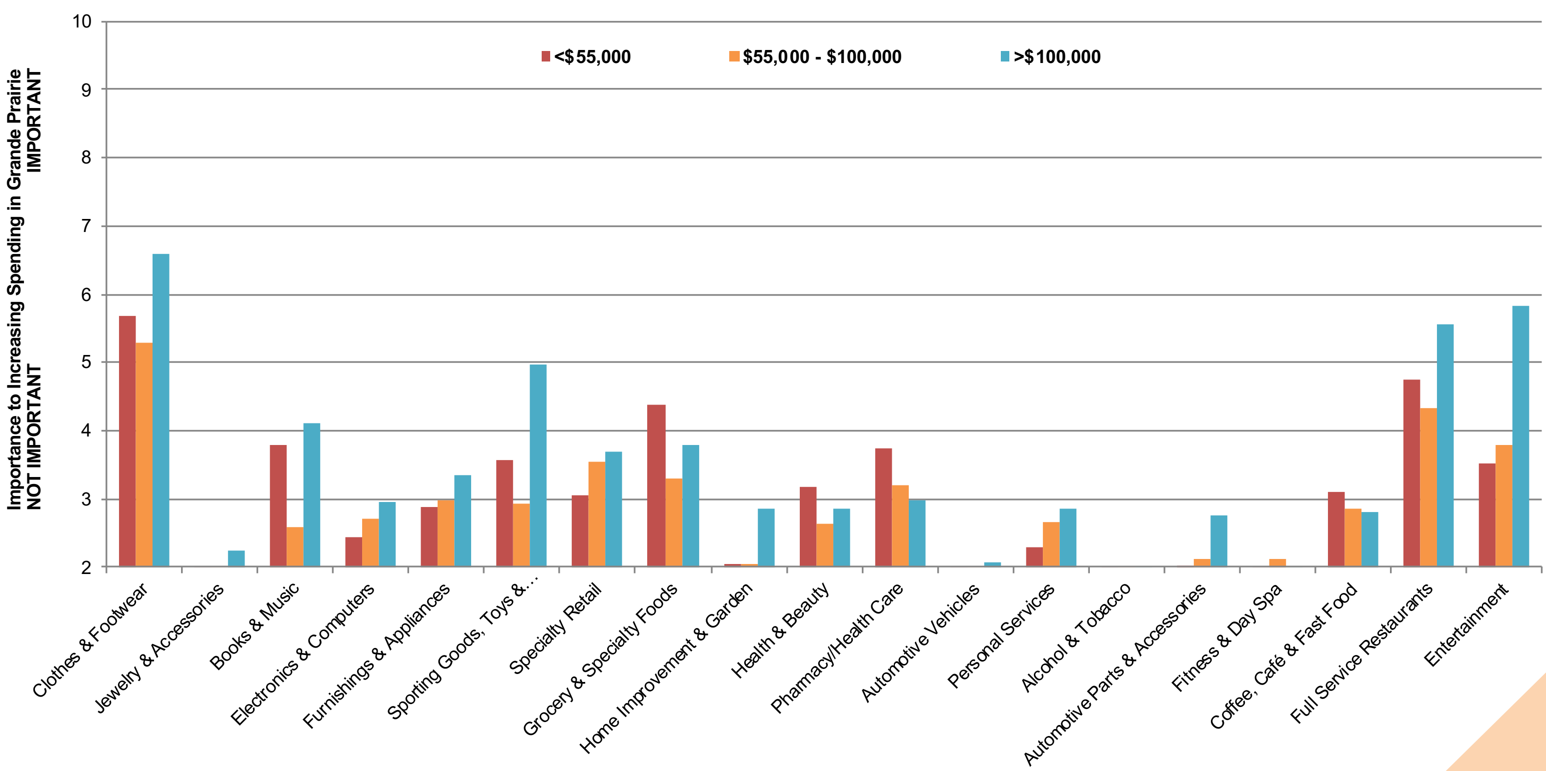


FIGURE 6.22

IMPORTANCE RATING TO INCREASE SPENDING BY RESPONDENT HOUSEHOLD INCOME



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 Home Improvement, Home Furnishings, Alcohol & Tobacco, Automotive and Personal Services, the income bracket comprising $55,000 to $100,000 exhibits the strong expenditure outlay in the city for Electronics, Sporting Goods, Books & Music and Cafe/Fast Food.

The importance ratings for the highest income earners are in the categories of Fashion, Sporting Goods & Toys, Entertainment and Full Service Restaurants.

This could be a reflection on the fact that some of the higher end brands that may be garnering their spending are not likely found in Grande Prairie, but they are perhaps not as willing to travel the distance to access them as they have in the past, and would like a slightly more upscale mix in Grande Prairie.

However, the importance rating for the lower and middle income segments is very important suggesting that the value orientation of the market and brands such as IKEA, Indigo, H&M, Sport Chek or MEC as well as other fashion formats and Olive Garden and Red Lobster restaurant brands would be very well supported in the Grande Prairie market.

6.8 ONLINE SPENDING PATTERNS

As retail trends continue to evolve and as concerns over traditional brick and mortar stores losing sales to online merchants continues, the Consumer Intercept Survey asked respondents about their spending patterns online.

With Grande Prairie being a more remote market, and its stature as a regional retail market becoming even more solidified, the role of online retail can benefit the community by providing opportunities to allocate retail space for goods pickup or even identify where gaps are in the marketplace.

For goods pickup, the smaller footprint IKEA Pickup concept at 30,000 sf is ideally positioned for Grande Prairie and would capture on-line sales and convert them into bricks and mortar.

In recent years, the advent of Wayfair has become very competitive in the Home Furnishing online market resulting in a competitive landscape for this category. However, it has not resulted in a decline in spending, whereby the strong home furnishings brands are still finding success in the physical format.

Figures 6.23 and 6.24 illustrate the on-line spending patterns by ALL Respondents and as broken down into age groups (18-34 Years, 34 - 55 Years and 55 Years +).

Figure 6.23 compares the 2016 survey results to 2018 and clearly illustrates the continued growth in Books & Music and Clothes & Footwear and Electronics. In particularly, Books & Media and Electronics increased three-fold from 11% and 4% in 2016 to 36% and 12% respectively in 2019.

Overall online sales more than doubled from 2.2% in 2016 to 5.3% in 2019.

FIGURE 6.23
PERCENTAGE OF ONLINE SPENDING BY SURVEY RESPONDENTS

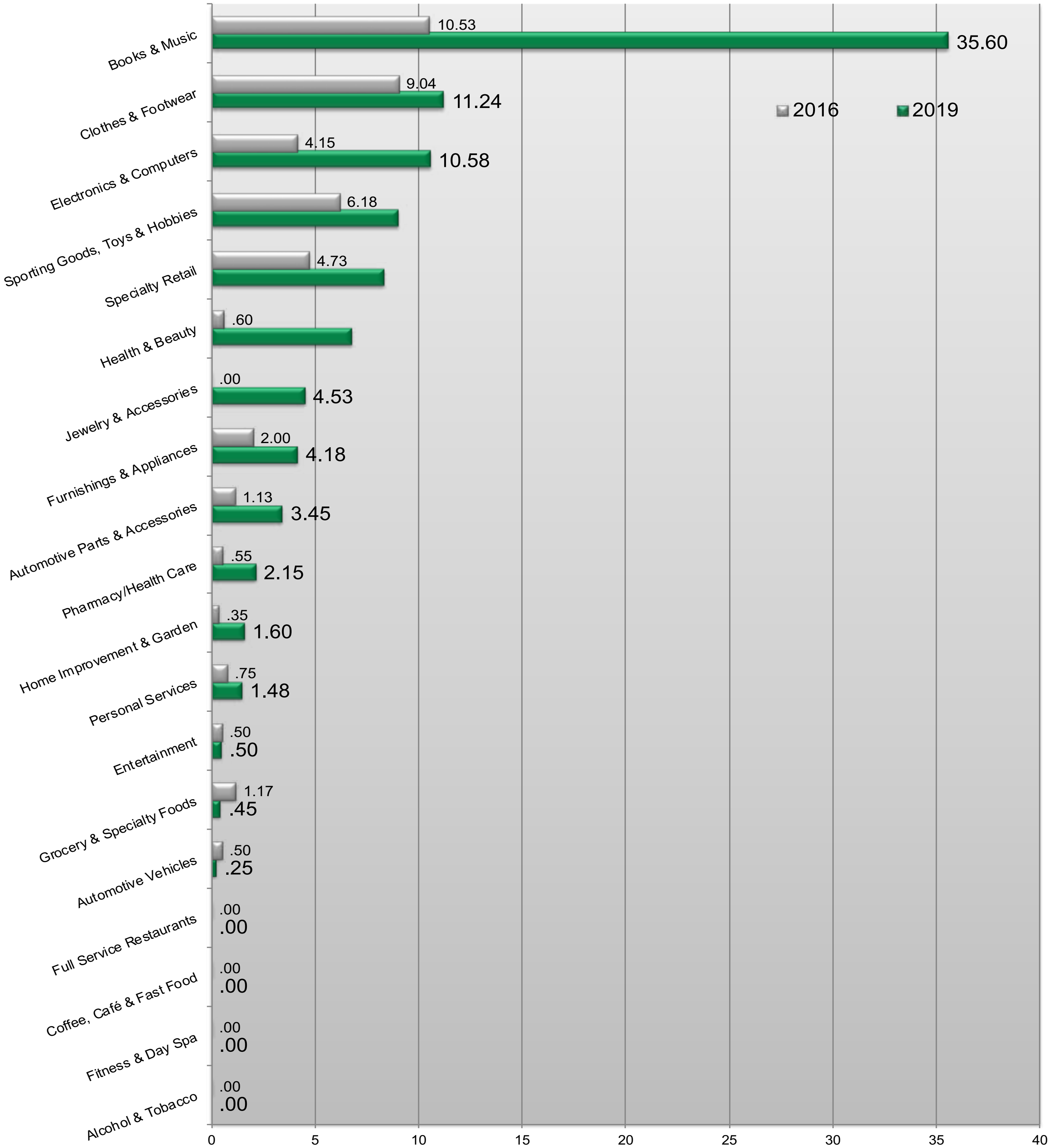
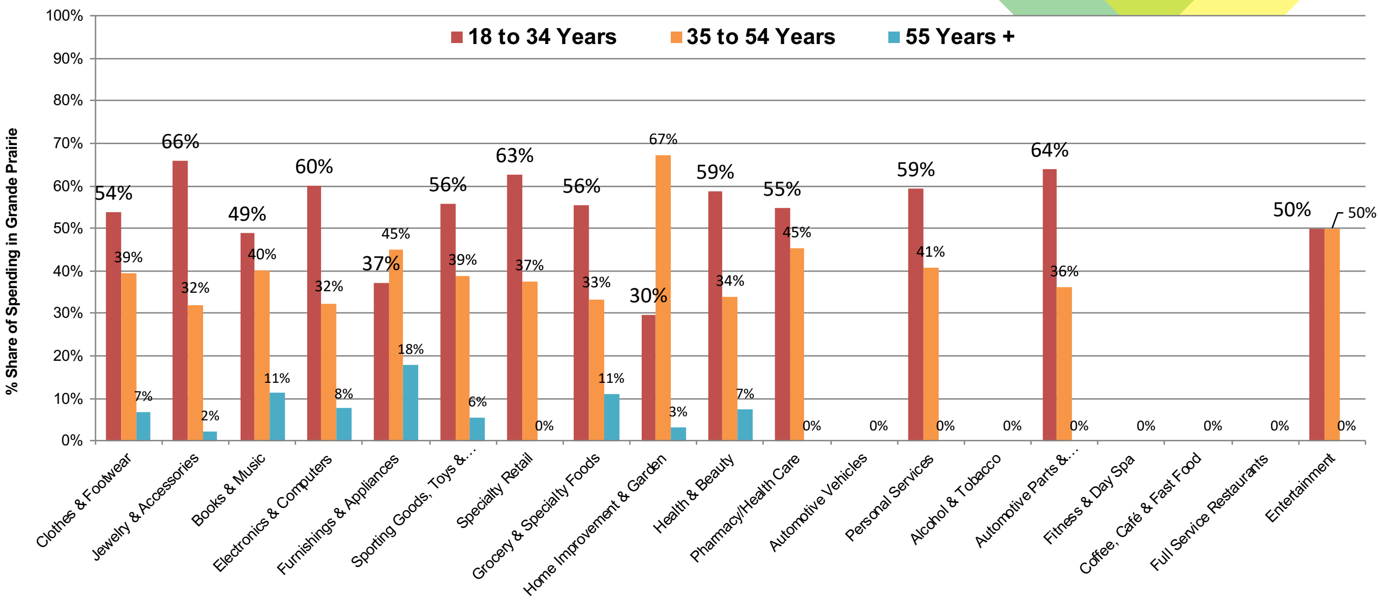


FIGURE 6.24
PERCENTAGE OF ONLINE SPENDING BY AGE COHORT



When comparing this breakdown by age, **Figure 6.24** reveals that the most prominent spending online is clearly by the 18-34 Year age cohort, almost across the board. However, the 35-54 Year age cohort do spend the most online in Home Improvement and Home Furnishings.

6.9
SUMMARY & IMPLICATIONS

The Consumer Intercept Survey yielded findings that validated the identified Trade Area as well as the strength of Grande Prairie as a regional serving hub for northwestern Alberta and northeastern British Columbia.

The respondents interviewed in the process confirmed previous anecdotal statements regarding tenants that are desired in the community such as Red Lobster, Olive Garden, IKEA and Indigo.

The majority of respondents indicated a desire to have more Clothing & Footwear, Full Service Restaurants, Sporting Goods & Toys and Entertainment.

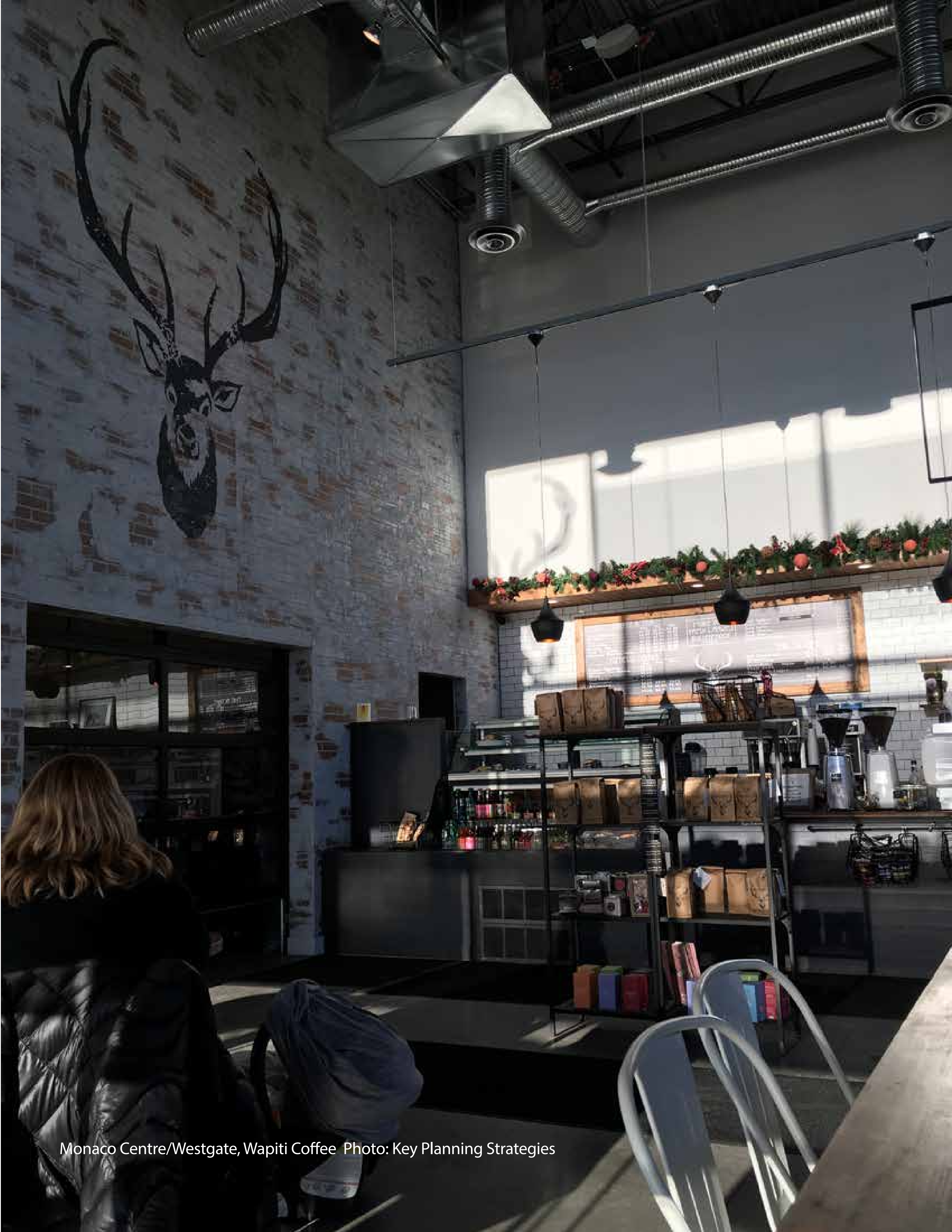
These particular categories were not only identified as specific categories, but the spending patterns and importance ratings of the respondents validated these sentiments.

The types of tenants sought by respondents combined with their spending patterns suggests that current major locations in the city can fulfill retailer site location requirements particularly in the West and North Sectors.

Prairie Mall is well-established and supported, and continues to step up its game. It is in an excellent position to attract progressive, trendy tenants for whom an enclosed mall is desired (e.g. H&M, Uniqlo, Sport Chek) while at the same time competing with the evolving comparison merchandise offering at Westgate.

The downtown area, will no doubt continue to face external pressures resulting from continued growth on the fringe of the City, but growth along Resources Road is taking shape and providing local community scale opportunities Downtown is still recognized as an important node that can accommodate future local specialty tenant opportunities.

The most significant appeal of Grande Prairie's Retail Market is the large and proven trade area penetration as well as the strength and spending propensity of the high earning and fast growing young family segment (<55 years).



Monaco Centre/Westgate, Wapiti Coffee Photo: Key Planning Strategies

7 CONCLUSION

The Retail Market & Gap Analysis for the City of Grande Prairie entailed an extensive process summarized in the following:

- *A detailed tabulation of the city's existing retail inventory further allocated into retail categories and sensitized by sector and estimated retail sales performance;*
- *A Consumer Intercept Survey of residents (local and regional) of Grande Prairie to ascertain their 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 salient facts about Grande Prairie's Retail Market:

FACT - City of Grande Prairie serves a Total Trade Area of almost 288,500 residents.

FACT - City of Grande Prairie's Trade Area extends into Northeastern British Columbia and Northwest Territories.

FACT - City of Grande Prairie's Primary Trade Area has over 171,000 residents.

FACT - City of Grande Prairie could support over 5.4 million sf of retail floorspace.

FACT - City of Grande Prairie has new retail developments ranging in size and scale from Neighbourhood to Regional.

FACT - City of Grande Prairie has a high income, young family demographic.

FACT - City of Grande Prairie has a net INFLOW of $446 million in Retail Sales.

FACT - City of Grande Prairies sales attraction and retention results in only $106.6 million in categories that exhibit retail sales OUTFLOW (including auto).

FACT - City of Grande Prairie has a current residual demand for 1.02 million sf of retail space.

FACT - City of Grande Prairie could have demand for an additional 1.02 million sf of new retail space by 2028.

FACT - Consumer Survey Respondents want Full-Service Restaurants, Clothing & Footwear, Sporting Goods & Toys and Entertainment at value to mid price points.

FACT - Residents want more than any other retailers Red Lobster, Olive Garden, Indigo Books, Sport Chek and Montana's BBQ & Grill.

FACT - Target audience for retailers are the middle to upper-middle income households comprised of 18 to 55 year olds.

FACT - City of Grande Prairie is a compatible market for the following potential retail tenant types (see following page for additional tenants identified by Consumer Survey Respondents):

RETAIL PROSPECTS

FOOD & BEVERAGE / CONVENIENCES / SERVICES

COBS Fresh Bread
De Dutch
Olive Garden Italian Restaurant
The Chopped Leaf
milestones GRILL + BAR
Oodle Noodle
IHOP
the old spaghetti factory
Good Earth Coffeehouse and Bakery
Triple-O's White Spot
White Spot Legendary Restaurants
smashburger smash. sizzle. savor.
MR.SUB
COLD STONE CREAMERY
JOEY RESTAURANTS
RED ROBIN GOURMET BURGERS
la prep
SOUTH ST. BURGER
Nando's
baskin robbins
CHUCK E. CHEESE'S
Booster Juice
TACO BELL
BIER MARKT
Canada's Pub HUDSONS
BUFFALO WILD WINGS
chili's
CACTUS CLUB CAFE
restaurant · pub Fionn MacCool's established 1996
The Vitamin Shoppe
OUTBACK STEAKHOUSE
JOSEPH RICHARD GROUP
WINE AND BEYOND SPIRITS BEER & MORE
大統華 T&T Supermarket
Red Lobster
SANGSTER'S
Orangetheory Fitness
Rexall
PEARLE VISION
Education Station
FRESHCO. Fresher. Cheaper.
Bosley's Caring for pet wellness and nutrition
WINE AND BEYOND SPIRITS BEER & MORE
EVELINE CHARLES SALONS | SPAS | BEAUTY MD

7 RETAIL PROSPECTS

FASHION, SPORTING GOODS, HOUSE & HOME, WELLNESS

AMERICAN EAGLE OUTFITTERS ae.com
H&M
adidas
QUIKSILVER
FOREVER 21
GoodLife FITNESS
ROOTS
West49
zumiez
Bench.
TIPTOP Tailors
BANANA REPUBLIC
dynamite
THEFACESHOP NATURAL STORY
M·A·C
Joe FRESH
Aritzia
UNI QLO
LUSH
ZARA
MINISO
Indigo Books · Gifts · Kids
VICTORIA'S SECRET
L'OCCITANE EN PROVENCE
ICING
ATMOSPHERE CAMPING • HIKING • OUTDOORS
JACK & JONES
ARC'TERYX
MOUNTAIN WAREHOUSE
LOFT
Browns
ALDO
buybuy BABY
FOSSIL
DSW DESIGNER SHOE WAREHOUSE
crocs
STRUCTUBE
SoftMoc www.softmoc.com
Running Room LTD.
Spring
SKECHERS
mattress mattress INC.
Hockey Life prohockeylife.com
MOUNTAIN EQUIPMENT CO-OP MEC
LEGO
Cabela's CANADA
daniadown HOME
IKEA
GOLF TOWN
SPORTCHEK
BUILD-A-BEAR WORKSHOP

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RETAIL
Market & Gap Analysis

City of Grande Prairie

APPENDICES

key planning strategies

keyfax market research

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A APPENDIX | RETAIL INVENTORY

Retail Business Name Note: Shading reflects changes or new additions to the City's inventory since 2015/2016	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (SF)
Acropolis Greek Restaurant	Downtown - 101 Ave	CENTRAL	Full Service Restaurants	5,000
After Hours Love	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	750
Al's News	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	1,000
Alberta Computers	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Home Electronics & Appliances	5,000
Alberta Trophy	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	1,250
Aurora Apparel	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Clothing & Apparel	750
Auto Canada	100th Street West Side	CENTRAL	Auto/RV/Motorsports Dealership	2,350
Bad Ass Jacks	Downtown - 97th Ave (100th St Station)	CENTRAL	Quick Service F&B	1,200
Bama Furniture	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Home Furnishings & Décor	14,000
Bar One	Downtown Core - 99th Ave	CENTRAL	Drinking Establishments	2,500
Bed Shoppe	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Home Furnishings & Décor	7,500
Bello Stylez (was Barbershop)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Health & Beauty	1,000
Better than Freds Billiards	Downtown Core - 99th Ave	CENTRAL	Arts & Entertainment	9,000
Black Dalia Tattoo	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	1,000
Canadian Thai Restaurant	Downtown - 97th Ave (100th St Station)	CENTRAL	Full Service Restaurants	1,200
Cannabis Store	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Alcohol & Tobacco	1,750
Cards Board Game Café	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Quick Service F&B	1,000
Cash Canada Pawn	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	5,000
Central Barbershop	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Health & Beauty	1,000
CIBC	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	4,000
Claude's Watch Repair	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	500
Comic Shop	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Books & Media	1,000
COOP Marketplace	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Grocery & Specialty Foods	33,000
Coyote Moon Hemp	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Clothing & Apparel	750
Creative Illusions Hair	Downtown - 101 Executive Place	CENTRAL	Health & Beauty	750
Cree8ive Ink Tattoo	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	750
Crouses Cleaners	Downtown Core - 99th Ave	CENTRAL	Personal Services	2,500
Crowned Beauty Wigs	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	500
Curry's Jewelers	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Jewelry & Accessories	1,000
Curves	Downtown Core - 97th Ave	CENTRAL	Health & Beauty	4,000
Custum Telus Cellular	Freestanding 100th St (west side)	CENTRAL	Specialty Retail	2,400
Dark Flavor Apparel	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Clothing & Apparel	750
Denny's	Downtown Core - 99th Ave	CENTRAL	Full Service Restaurants	3,500
Dluxe Womens Apparel	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Clothing & Apparel	1,500
Don's Dining	Station 97	CENTRAL	Quick Service F&B	2,000
Earl's Kitchen & Bar	Downtown Core - 99th Ave	CENTRAL	Full Service Restaurants	6,500
Edward Jones	Downtown - 98th Ave	CENTRAL	Personal Services	1,000
Escape Bistro Wine Bar	214 Place	CENTRAL	Drinking Establishments	1,500
Esquires (Montrose)	Downtown Core (Montrose)	CENTRAL	Quick Service F&B	1,250
Esquires Coffee	Downtown - Tuscan Square	CENTRAL	Quick Service F&B	1,000
Eternity Jewelry	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Jewelry & Accessories	750
Factory Hair Studio	Downtown - 101 Ave	CENTRAL	Personal Services	750
Farmer's Market	Downtown - Freestanding (101 Ave)	CENTRAL	Grocery & Specialty Foods	12,500
Fashionista	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Clothing & Apparel	1,750
Fit Body Boot Camp	Downtown - south of 100th St	CENTRAL	Fitness & Leisure	3,600
Focus Bookeeping	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	750
Forbes & Friends	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	1,000
Golden Star Chinese Restaurant	Downtown - Freestanding (101 Ave)	CENTRAL	Full Service Restaurants	7,000
Grande Prairie Coffee	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Quick Service F&B	750
Grande Prairie Pet Shop	Downtown Core - 99th Ave (TowneCentre)	CENTRAL	Specialty Retail	2,300
Grande Prairie Pharmacy	Downtown Core - 97th Ave (Junction Point)	CENTRAL	Pharmacy	750
Hair T's	214 Place	CENTRAL	Health & Beauty	1,000
Haircraft	Downtown Core - 99th Ave	CENTRAL	Personal Services	750
Hangar 19	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Clothing & Apparel	2,500
Heart of the Peace Gourmet Foods	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Grocery & Specialty Foods	1,000
Heiho Dojo	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	1,500
Hi Tech Business Systems	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	11,000
HJ's Bowling	Downtown - Tuscan Square	CENTRAL	Arts & Entertainment	9,000
Homesteader Health	Downtown Core - 99th Ave (Crystal Square)	CENTRAL	Health & Beauty	3,750
Homesteader Health	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	1,750
House of Spades Boutique	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Clothing & Apparel	1,000
Imperial Garden Collectibles	Downtown - 100th Ave	CENTRAL	Specialty Retail	1,500
Imperial Garden Restaurant	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Full Service Restaurants	2,500
Indigo Jewelry	Freestanding	CENTRAL	Jewelry & Accessories	1,000
Jenn Tina's Hair Design	Downtown - 101 Executive Place	CENTRAL	Health & Beauty	1,000

Retail Business Name Note: Shading reflects changes or new additions to the City's inventory since 2015/2016	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (SF)
Jeweled	Downtown - 100th Ave	CENTRAL	Jewelry & Accessories	500
Just Beachy	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Health & Beauty	1,250
Laurel's Preserves & Café	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	1,250
Linda's Hair Studio	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Health & Beauty	750
Liquor For Less	Downtown Core - 97th Ave	CENTRAL	Alcohol & Tobacco	3,100
Liquor Store	Downtown Core - 99th Ave (TowneCentre)	CENTRAL	Alcohol & Tobacco	1,000
Long & McQuade	Downtown Core - 97th Ave	CENTRAL	Specialty Retail	10,500
Mah's Family Restaurant	Downtown Core - 99th Ave (TowneCentre)	CENTRAL	Full Service Restaurants	2,500
Marlin Travel	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	1,250
Medicinne Shoppe Pharmacy	Downtown - Hospital	CENTRAL	Pharmacy	1,000
Menzies Printers	Downtown Core - 97th Ave	CENTRAL	Specialty Retail	4,000
Midwest Appliances	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Home Electronics & Appliances	13,300
Milano for Men	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Clothing & Apparel	2,700
Mission Thrift Store	Downtown Core - 99th Ave (TowneCentre)	CENTRAL	Specialty Retail	7,500
Money Mart	Downtown Core - 97th Ave (Safri Centre)	CENTRAL	Personal Services	750
Mood Mender	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Jewelry & Accessories	1,000
Moondance Shining	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	1,250
Mother Nurture Unique Baby	Downtown	CENTRAL	Specialty Retail	750
Mrs B's Drapery	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Home Furnishings & Décor	1,000
Music Centre	Freestanding 100th St (west side)	CENTRAL	Specialty Retail	2,500
New York Salon & Spa	Downtown - 101 Executive Place	CENTRAL	Health & Beauty	1,250
Nigerian Cuisine	Downtown - Freestanding	CENTRAL	Full Service Restaurants	2,000
No Need to Knock Apparel	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Clothing & Apparel	1,250
Nolan Shoe Repair	Downtown Core - 99th Ave	CENTRAL	Personal Services	500
Northern Lights Indoor Garden Centre	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Home Improvement & Gardening	1,000
Panago Pizza	Downtown - 97th Ave (100th St Station)	CENTRAL	Quick Service F&B	1,200
Picture Perfect Framing	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Home Furnishings & Décor	2,000
Pink Rain Hair	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Health & Beauty	750
Pita Pit	Downtown Core - 97th Ave	CENTRAL	Quick Service F&B	1,000
Pizza 73	Downtown Core - 99th Ave (Crystal Square)	CENTRAL	Quick Service F&B	1,250
Pizza Plus & Donair/ Biggs	Downtown Core - 97th Ave	CENTRAL	Quick Service F&B	1,000
Planet Beach	Downtown - Tuscan Square	CENTRAL	Personal Services	1,000
Primitive Lane Country Store	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	2,500
Promotional Product	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	1,000
Pure Home Design	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Home Furnishings & Décor	2,000
Quiznos	Downtown Core - 97th Ave	CENTRAL	Quick Service F&B	1,500
Ramona's Pizza	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Quick Service F&B	1,950
RBC	Junction Point Village	CENTRAL	Personal Services	13,000
Re-Runs Clothing	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Clothing & Apparel	750
Real Deals	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Clothing & Apparel	1,500
Real Deals Specialty Accessories	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	1,500
Retro Relics	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	500
Richmond Dry Cleaners	Downtown - 101 Executive Place	CENTRAL	Personal Services	1,500
Runaway Pieces	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	750
Sawmill Restaurant	Freestanding	CENTRAL	Full Service Restaurants	10,000
Scotch & Soda Salon	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	1,500
Scotiabank	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	5,100
Servus Credit Union	Downtown Core - 99th Ave	CENTRAL	Personal Services	7,000
Shark Club	Downtown Core - 99th Ave	CENTRAL	Full Service Restaurants	8,500
She Mann's Styling	Downtown Core - 99th Ave (TowneCentre)	CENTRAL	Health & Beauty	750
Sheperds Fold Books	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Books & Media	2,000
Simple Temptations	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	1,500
Simply Vines	Downtown - Crystal Square	CENTRAL	Alcohol & Tobacco	1,200
Sky Nails	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Health & Beauty	1,000
Snapshot Studio	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	1,000
Soho Hair Lounge	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Health & Beauty	1,250
Sole Addiction Shoes	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Footwear	2,000
Source Adult	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	1,000
Speedy Cash	Downtown Core - 99th Ave (Crystal Square)	CENTRAL	Personal Services	1,250
Sportswear Plus	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Clothing & Apparel	4,800
Statix Hair Skin & Nails	Downtown Core - 97th Ave	CENTRAL	Health & Beauty	1,000
Styles & Smiles	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	750
T Sedore Photography	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Home Electronics & Appliances	750
Taj Grill & Bar	Downtown Core - 97th Ave (Safri Centre)	CENTRAL	Full Service Restaurants	2,500
Tangled Bobbin	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	1,000

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Retail Business Name Note: Shading reflects changes or new additions to the City's inventory since 2015/2016	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (SF)
The Colorbox	Downtown - 101 Ave	CENTRAL	Personal Services	750
The Industry (was Breakers Sports Lounge)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Drinking Establishments	3,000
The Look Hair Design	Downtown - 100th Ave	CENTRAL	Personal Services	750
Tim Hortons	Freestanding 100th St (west side)	CENTRAL	Quick Service F&B	2,800
Tito's Mediterranean & Western Cuisine	Downtown - 101 Executive Place	CENTRAL	Full Service Restaurants	1,500
Towne Centre Furniture	Downtown Core - 99th Ave (TowneCentre)	CENTRAL	Home Furnishings & Décor	16,000
Towne Centre Laundry	Downtown - 97th Ave (100th St Station)	CENTRAL	Personal Services	2,500
Tres Chic Hair Design	Downtown - 100th Ave	CENTRAL	Health & Beauty	1,000
Twisters Pizza	Downtown Core - 97th Ave (Safri Centre)	CENTRAL	Quick Service F&B	750
Uniglobe Travel	Downtown - Tuscan Square	CENTRAL	Personal Services	1,000
VACANT	Downtown Core - 100th Ave - 10006 A	CENTRAL	**VACANT**	1,350
VACANT	Downtown Core - 100th Ave - 10009 B	CENTRAL	**VACANT**	1,000
VACANT	Downtown Core - 100th Ave - 10027 A	CENTRAL	**VACANT**	1,500
VACANT	Downtown Core - 100th Ave - 10048 A	CENTRAL	**VACANT**	1,250
VACANT	Downtown Core - 100th Ave - 10048 B	CENTRAL	**VACANT**	1,250
VACANT	Downtown Core - 100th Ave - 10119 A	CENTRAL	**VACANT**	1,200
VACANT	Downtown Core - 100th Ave - 10119 B	CENTRAL	**VACANT**	1,200
VACANT	Downtown Core - 97th Ave	CENTRAL	**VACANT**	750
VACANT	Downtown Core - 99th Ave - 9907 #8	CENTRAL	**VACANT**	1,960
VACANT	Downtown Core - 99th Ave - 9920	CENTRAL	**VACANT**	3,000
VACANT	Downtown Core - 99th Ave - 9926	CENTRAL	**VACANT**	2,000
VACANT (was All the Rage Tattoo)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	**VACANT**	1,000
VACANT (was Avenue Crafts & Gifts)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	**VACANT**	750
VACANT (was Babylon Tower Restaurant)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	**VACANT**	2,000
VACANT (was Cash Factory)	Downtown - Tuscan Square	CENTRAL	**VACANT**	750
VACANT (was Diamond City Jewelers)	Downtown Core - 99th Ave (TowneCentre)	CENTRAL	**VACANT**	1,250
VACANT (was Edible Arrangements)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	**VACANT**	2,500
VACANT (was Elite Home)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	**VACANT**	1,500
VACANT (was Force Comics)	Downtown Core - 99th Ave	CENTRAL	**VACANT**	1,000
VACANT (was GP Hobbies & Gifts)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	**VACANT**	1,000
VACANT (was Horn of Africa)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	**VACANT**	1,250
VACANT (was Kids Incredible)	Downtown Core - 100th Ave - 10029	CENTRAL	**VACANT**	1,800
VACANT (was Peace Halal Market)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	**VACANT**	1,000
VACANT (was Prairie Cash Pawn)	Downtown Core - 100th Ave - 10118	CENTRAL	**VACANT**	750
VACANT (was Skelly's Web Tattoos)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	**VACANT**	1,000
VACANT (was Staples Business Interiors)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	**VACANT**	2,100
VACANT (was Subway)	Downtown Core - 99th Ave (Crystal Square)	CENTRAL	**VACANT**	2,500
VACANT (was Toni's Gluten Free Foods)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	**VACANT**	500
VACANT(was 7/11)	Downtown - 97th Ave	CENTRAL	**VACANT**	2,000
Vanity Instant Salon	Junction Point Village	CENTRAL	Health & Beauty	2,500
Victoria's Attic	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Clothing & Apparel	1,250
Vine Luxury Spa	Junction Point Village	CENTRAL	Personal Services	2,000
Wally's Kitchen	Downtown - south of 100th St	CENTRAL	Quick Service F&B	1,800
Wally's Laundromat	Downtown - south of 100th St	CENTRAL	Personal Services	1,200
Wally's Mini Mart	Downtown - south of 100th St	CENTRAL	Grocery & Specialty Foods	2,500
Wendy's	Downtown Core - 99th Ave	CENTRAL	Quick Service F&B	2,600
Wild Side T-Shirt Factory	Downtown - 100th Ave	CENTRAL	Clothing & Apparel	1,000
Wonderland Toy & Hobby	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Toys & Hobbies	2,000
Animal First Clinic	Crystal Lake 92nd St & 116th Ave	EAST	Personal Services	1,750
Aurora Eye Care	Cobblestone Lane 92nd St & 100th Ave	EAST	Personal Services	3,000
Ciao Bella Spa	Crystal Lake 92nd St & 116th Ave	EAST	Health & Beauty	1,000
Circle K Convenience	92nd St & 92nd Ave NEW	EAST	Grocery & Specialty Foods	1,000
Circle K Convenience	96th St & 116th Ave	EAST	Grocery & Specialty Foods	1,250
Circle K Convenience	Lakeland Plaza 91st St & 132nd Ave	EAST	Grocery & Specialty Foods	2,000
East Star Convenience	92nd St & 100th Ave (NE Corner)	EAST	Grocery & Specialty Foods	1,500
Eastside Grocery	Hillside 94th St & 100th Ave	EAST	Grocery & Specialty Foods	1,500
Eastside Kitchen	Hillside 94th St & 100th Ave	EAST	Full Service Restaurants	1,500
Eastside Liquor	Hillside 94th St & 100th Ave	EAST	Alcohol & Tobacco	3,000
Europa Deli	Crystal Lake 92nd St & 116th Ave	EAST	Grocery & Specialty Foods	1,000
Fabutan	92nd St & 100th Ave (NE Corner)	EAST	Personal Services	1,000
Good To Grow	Crystal Lake 92nd St & 116th Ave	EAST	Specialty Retail	1,000
Liquor Depot	92nd St & 100th Ave (NE Corner)	EAST	Alcohol & Tobacco	2,000
Liquor Depot	92nd St & 92nd Ave NEW	EAST	Alcohol & Tobacco	1,500
Liquor Depot	Cobblestone Lane 92nd St & 100th Ave	EAST	Alcohol & Tobacco	2,500
M&M Meat Shops	Cobblestone Lane 92nd St & 100th Ave	EAST	Grocery & Specialty Foods	1,000

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Mac's Convenience	96th St & 100th Ave	EAST	Grocery & Specialty Foods	2,500
Mary Brown's Chicken	Cobblestone Lane 92nd St & 100th Ave	EAST	Quick Service F&B	1,000
Mystic Dragon Vape	92nd St & 100th Ave (NE Corner)	EAST	Alcohol & Tobacco	1,250
New Roastery Café (was Coffee Crave Café)	92nd St & 100th Ave (NE Corner)	EAST	Quick Service F&B	1,500
Oriental Wok	Cobblestone Lane 92nd St & 100th Ave	EAST	Quick Service F&B	1,000
Peppermint Twist Hair & Design	93rd St & 100th Ave (NE Corner)	EAST	Health & Beauty	1,000
Pizza Experts	92nd St & 100th Ave (NE Corner)	EAST	Quick Service F&B	1,000
Prairie Nails	93rd St & 100th Ave (NE Corner)	EAST	Personal Services	1,000
Ramona's Pizza	Lakeland Plaza 91st St & 132nd Ave	EAST	Quick Service F&B	1,000
Royal Spirits	Lakeland Plaza 91st St & 132nd Ave	EAST	Alcohol & Tobacco	2,000
Shoppers Drug Mart	Cobblestone Lane 92nd St & 100th Ave	EAST	Pharmacy	15,000
Snap Fitness	Cobblestone Lane 92nd St & 100th Ave	EAST	Fitness & Leisure	5,000
Starbucks	Cobblestone Lane 92nd St & 100th Ave	EAST	Quick Service F&B	2,000
Subway	92nd St & 100th Ave (NE Corner)	EAST	Quick Service F&B	1,500
Subway	Lakeland Plaza 91st St & 132nd Ave	EAST	Quick Service F&B	1,000
TD Bank	Cobblestone Lane 92nd St & 100th Ave	EAST	Personal Services	3,500
Tim Hortons	92nd St & 92nd Ave NEW	EAST	Quick Service F&B	2,000
VACANT	Hillside 94th St & 100th Ave	EAST	**VACANT**	1,500
VACANT (was Crystal Spirits)	Crystal Lake 92nd St & 116th Ave	EAST	**VACANT**	1,000
Winks Beer	Crystal Lake 92nd St & 116th Ave	EAST	Alcohol & Tobacco	2,000
Winks Mountainview Groceries	Mountainview 95th St & 108th Ave	EAST	Grocery & Specialty Foods	2,300
A&W	Freestanding	NORTH	Quick Service F&B	3,400
A&W	Prairie Mall Unit 260	NORTH	Quick Service F&B	389
Aarons Appliances	Strip Centre 100th St (east side)	NORTH	Home Furnishings & Décor	7,000
Action Car & Truck (was Custom Truck Parts)	Freestanding	NORTH	Auto Parts & Accessories	15,000
Action Sportswear	Prairie Mall Unit 124	NORTH	Clothing & Apparel	4,900
Alia n Tan Jay	Prairie Mall Unit 246B	NORTH	Clothing & Apparel	2,257
Amazing Nails & Spa	Strip Centre 100th St (east side)	NORTH	Personal Services	1,500
Amish Furniture Home & Health	Freestanding	NORTH	Home Furnishings & Décor	1,500
Arby's	Freestanding	NORTH	Quick Service F&B	3,400
Ardene	Prairie Mall Unit 330	NORTH	Jewelry & Accessories	17,000
Ashley Furniture	Royal Oaks - Freestanding	NORTH	Home Furnishings & Décor	20,000
Asian Variety Store	Bell Tower Plaza	NORTH	Grocery & Specialty Foods	600
ATB Financial	Canadian Tire Plaza (east side of 99th St)	NORTH	Personal Services	5,600
Ava's Pizza	Strip Centre 100th St (east side)	NORTH	Quick Service F&B	750
Bartons Archery & Hunting	Strip Centre (west side of 99th south of 116th)	NORTH	Sporting Goods	5,300
Basics Hair Care	KFC Plaza 100th St (east side)	NORTH	Health & Beauty	1,000
Bath & Body Works	Prairie Mall Unit 246D	NORTH	Health & Beauty	2,923
Beach Bumz Tanning	Centre 100 Plaza	NORTH	Personal Services	1,000
Beachcomber Hot Tubs	Freestanding	NORTH	Home Improvement & Gardening	8,000
Bell	Prairie Mall Unit 114B	NORTH	Specialty Retail	1,229
Below the Belt	Prairie Mall Unit 230	NORTH	Clothing & Apparel	2,602
Ben Moss	Prairie Mall Unit 114A	NORTH	Jewelry & Accessories	893
Benjamin Moore	Freestanding (100th St north of 116th west)	NORTH	Home Improvement & Gardening	2,500
Benjamin Moore Paints	100th Street	NORTH	Home Improvement & Gardening	1,500
Bentley	Prairie Mall Unit 128	NORTH	Specialty Retail	1,545
Beth's Books	Prairie Ridge	NORTH	Books & Media	2,000
Blackmans Butcher Shop	Strip Centre (west side of 99th south of 116th)	NORTH	Grocery & Specialty Foods	6,000
Bliss Salon & Spa	Northridge Business Park	NORTH	Health & Beauty	4,000
Bluenotes	Prairie Mall Unit 238	NORTH	Clothing & Apparel	3,476
BMO	Prairie Mall Unit 114C	NORTH	Personal Services	567
Boathouse	Prairie Mall Unit 290	NORTH	Clothing & Apparel	5,146
Body Shop	Prairie Mall Unit 115	NORTH	Health & Beauty	635
Bootlegger	Prairie Mall Unit118	NORTH	Clothing & Apparel	4,162
Boston Pizza	Freestanding	NORTH	Full Service Restaurants	7,000
Bright Beginning Child Care	Prairie Plaza	NORTH	Personal Services	3,000
Bullets & Broadhead Shooting Centre	Northridge Business Park	NORTH	Arts & Entertainment	10,000
Canopy West	Strip Centre 100th St (west side)	NORTH	Auto Parts & Accessories	11,000
Cap-It	Freestanding (100th St north of 116th west)	NORTH	Auto Parts & Accessories	5,000
Carpet One	Miscellaneous 100th St (west side)	NORTH	Home Furnishings & Décor	5,000
Carpet Superstores	Royal Oaks	NORTH	Home Furnishings & Décor	5,000
Carry Me Mommy (was Kettles & Company)	Prairie Plaza	NORTH	Specialty Retail	1,500
Cash Canada	Strip Centre 100th St (east side)	NORTH	Personal Services	2,000
Cash Stop	Freestanding	NORTH	Personal Services	750
Centre Stage Dance Wear	Prairie Plaza North	NORTH	Personal Services	1,000

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Chatters	Prairie Mall Unit 184	NORTH	Health & Beauty	2,844
Chiklets Junior Salon &Spa	Strip Centre 100th St (west side)	NORTH	Health & Beauty	1,250
Children's Place	Prairie Mall Unit 190	NORTH	Clothing & Apparel	4,443
Circle K Convenience	Miscellaneous 100th St (west side)	NORTH	Grocery & Specialty Foods	2,500
City Furniture	Northridge Business Park	NORTH	Home Furnishings & Décor	20,000
Claire's	Prairie Mall Unit 274	NORTH	Jewelry & Accessories	1,021
Cloverdale Paint	Centre 100 Plaza	NORTH	Home Improvement & Gardening	2,000
Comm Vest Realty	Strip Centre (east side of 99th south of 116th)	NORTH	Personal Services	1,000
COOP Convenience Store	Royal Oak Strip Centre	NORTH	Grocery & Specialty Foods	1,000
COOP Maketplace (opening 2019)	Trader Ridge 100th Street	NORTH	Grocery & Specialty Foods	34,126
Cooperators	Northridge NEW	NORTH	Personal Services	1,000
Cotton Candy	Prairie Ridge	NORTH	Quick Service F&B	1,500
Create a Portrait	Prairie Plaza North	NORTH	Personal Services	1,500
Creative Emporium Tattoo	Bell Tower Plaza	NORTH	Personal Services	600
Creative Treasures Framing	Northridge Business Centre	NORTH	Home Furnishings & Décor	750
Culligan Water	Freestanding	NORTH	Specialty Retail	1,500
Culture	Prairie Mall Unit 228	NORTH	Jewelry & Accessories	1,015
Dairy Queen	Miscellaneous 100th St (west side)	NORTH	Quick Service F&B	3,000
David's Tea	Prairie Mall Unit 270	NORTH	Quick Service F&B	832
Denon Home Theatre	Prairie Plaza	NORTH	Home Electronics & Appliances	6,000
Denon Home Theatre	Prairie Plaza	NORTH	Home Improvement & Gardening	2,000
DNI Cleaning Supplies	Freestanding beside Nu Floors	NORTH	Home Improvement & Gardening	2,000
Dollarama	Centre 100 Plaza	NORTH	Specialty Retail	12,000
Dollarama	Prairie Mall Unit 302	NORTH	Specialty Retail	1,006
Domenico's Deli (was Klassica)	Prairie Plaza	NORTH	Grocery & Specialty Foods	2,000
Dons Menswear	Bell Tower Plaza	NORTH	Clothing & Apparel	2,000
Doug Marshall Chevrolet Cadillac	100th Street	NORTH	Auto/RV/Motorsports Dealership	30,000
Driving Force Vehicle Rentals/Sales/Leasing	100th Street	NORTH	Auto/RV/Motorsports Dealership	4,500
Eastlink	Prairie Mall Unit K2	NORTH	Specialty Retail	200
Easy Home	Centre 100 Plaza	NORTH	Home Furnishings & Décor	3,000
Echo Video Unlimited	Strip Centre 100th St (east side)	NORTH	Home Electronics & Appliances	3,000
EDO	Prairie Mall Unit 252	NORTH	Quick Service F&B	385
Edward Jones	Northridge Business Centre	NORTH	Personal Services	1,500
Edwards Factory Outlet	Freestanding	NORTH	Clothing & Apparel	8,000
Egan's Pub Restaurant	Northridge NEW	NORTH	Drinking Establishments	2,000
Enterprise Car Rental	Freestanding	NORTH	Auto/RV/Motorsports Dealership	1,500
Ernie's Fitness Experts	Ernie's Plaza	NORTH	Sporting Goods	17,300
Ernie's Sports Experts	Ernie's Plaza	NORTH	Sporting Goods	32,200
Evening Shade Tatoo	Miscellaneous 100th St (west side)	NORTH	Personal Services	1,000
Expressions Home Décor	Prairie Mall Unit 300	NORTH	Home Furnishings & Décor	4,848
Extreme RC	Strip Centre 100th St (west side)	NORTH	Toys & Hobbies	750
Fine Line Carpets	Northridge Business Park	NORTH	Home Furnishings & Décor	8,000
Flaman Fitness	Prairie Plaza	NORTH	Fitness & Leisure	3,000
Flight Centre	Prairie Mall Unit 317	NORTH	Personal Services	735
Flip Flop Shop	Prairie Mall Unit 370	NORTH	Footwear	1,093
Foot Locker	Prairie Mall Unit 126	NORTH	Footwear	2,411
Fountain Tire	Freestanding	NORTH	Auto Parts & Accessories	12,000
Fourward Sports	Freestanding 100th St (east side)	NORTH	Sporting Goods	6,000
Fusion	Prairie Mall Unit 135	NORTH	Clothing & Apparel	1,740
FYIdoctors	Prairie Plaza North	NORTH	Personal Services	8,000
Garage	Prairie Mall Unit 224	NORTH	Clothing & Apparel	3,603
Giant Tiger	Centre 100 Plaza	NORTH	Grocery & Specialty Foods	21,000
Global Pet Foods	Royal Oaks	NORTH	Specialty Retail	3,000
Go! Toys & Games	Prairie Mall Unit 305	NORTH	Toys & Hobbies	3,366
GP Therapeutic Massage (was Marcy's Flower)	Royal Oak Strip Centre	NORTH	Personal Services	1,000
Grande Prairie Asian Massage	Bell Tower Plaza	NORTH	Personal Services	1,000
Grande Prairie Nissan	Bypass	NORTH	Auto/RV/Motorsports Dealership	12,200
Grande Prairie Upholstery	Miscellaneous 100th St (west side)	NORTH	Home Furnishings & Décor	1,000
Great Canadian Liquor Company (Quality Inn)	Northridge Business Park	NORTH	Alcohol & Tobacco	3,000
Growers Direct Flowers	Bell Tower Plaza	NORTH	Personal Services	1,500
Haberman Properties	KFC Plaza 100th St (east side)	NORTH	Personal Services	1,000
Haircraft (was Soul Remedies)	Prairie Plaza	NORTH	Personal Services	1,500
Hallmark	Prairie Mall Unit 174	NORTH	Specialty Retail	1,932
Happy Hippo	Prairie Mall Unit 172	NORTH	Health & Beauty	1,770
Harley Davidson	Prairie Ridge	NORTH	Auto Parts & Accessories	10,000

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Headroom Salon	Prairie Ridge	NORTH	Personal Services	4,000
Health Hut	Prairie Mall Unit 244	NORTH	Health & Beauty	1,263
Hearth & Home	Northridge Business Park	NORTH	Home Furnishings & Décor	2,000
Hernami Goldsmith & Jewelry	Prairie Plaza	NORTH	Jewelry & Accessories	1,250
Home Hardware	Freestanding 100th St (east side)	NORTH	Home Improvement & Gardening	20,000
Hong Fah Thai	Royal Oaks	NORTH	Quick Service F&B	2,000
Hong Kong House Chinese	KFC Plaza 100th St (east side)	NORTH	Full Service Restaurants	1,500
Horangi TaeKwonDo	Strip Centre 100th St (east side)	NORTH	Personal Services	2,000
HR Block	KFC Plaza 100th St (east side)	NORTH	Personal Services	1,000
Humpty's Family Restaurant	Freestanding	NORTH	Full Service Restaurants	2,000
IGA Freson Bros	Canadian Tire Plaza (east side of 99th St)	NORTH	Grocery & Specialty Foods	35,000
Indigo Spirit	Prairie Mall Unit 104	NORTH	Books & Media	3,436
Inkubus Tatoo	Strip Centre (east side of 99th south of 116th)	NORTH	Personal Services	750
Investors Group	Centre 100 Plaza	NORTH	Personal Services	2,000
Jersey City	Prairie Mall Unit 220	NORTH	Sporting Goods	1,507
Joey's Seafood	Royal Oak Strip Centre	NORTH	Full Service Restaurants	2,500
Jugo Juice	Prairie Mall Unit K3	NORTH	Quick Service F&B	200
Kal Tire	Freestanding	NORTH	Auto Parts & Accessories	5,000
Keddie's Tack & Western Wear	Freestanding	NORTH	Specialty Retail	14,000
Ken Sargent Buick GMC Pontiac	100th Street	NORTH	Auto/RV/Motorsports Dealership	27,000
KFC	KFC Plaza 100th St (east side)	NORTH	Quick Service F&B	2,300
Koodoo	Prairie Mall Unit K6	NORTH	Specialty Retail	200
La Senza	Prairie Mall Unit 121	NORTH	Clothing & Apparel	3,031
Lang Locksmiths	Strip Centre 100th St (east side)	NORTH	Personal Services	2,000
Lazy One	Prairie Mall Unit 170	NORTH	Clothing & Apparel	1,473
Le Chateau	Prairie Mall Unit 280	NORTH	Clothing & Apparel	4,904
Leather Plus	Prairie Mall Unit 188	NORTH	Clothing & Apparel	1,473
Liberty Tax Service	Central Square 100th St (west side)	NORTH	Personal Services	1,000
Liquor Barn	Strip Centre 100th St (west side)	NORTH	Alcohol & Tobacco	4,000
Lisse	Prairie Mall Unit 218	NORTH	Health & Beauty	1,761
Little Caesars	Northridge Business Park	NORTH	Quick Service F&B	1,000
Lube City Oil	Freestanding	NORTH	Auto Parts & Accessories	3,200
Lululemon	Prairie Mall Unit 102	NORTH	Clothing & Apparel	3,805
Lynns Alterations	Bell Tower Plaza	NORTH	Personal Services	1,200
M5 Jean Service	Prairie Mall Unit 194A	NORTH	Clothing & Apparel	3,780
Major's Family Restaurant (was Pizza Hut)	Freestanding (100th St north of 116th west)	NORTH	Full Service Restaurants	4,000
Mama Panda Buffet	Freestanding	NORTH	Full Service Restaurants	3,500
Manhandler Barber Shop	Prairie Mall Unit 294	NORTH	Health & Beauty	1,100
Marble Slab Creamery	Royal Oak Strip Centre	NORTH	Quick Service F&B	1,000
Mark's Workwearhouse	Prairie Mall Unit 141	NORTH	Clothing & Apparel	5,827
Marshalls	Prairie Mall Unit 320	NORTH	Clothing & Apparel	23,857
McDonalds	Northridge Business Park	NORTH	Quick Service F&B	4,000
McGoverns RV & Marine	100th Street	NORTH	Auto/RV/Motorsports Dealership	7,500
Meat Shop on Main	Freestanding	NORTH	Grocery & Specialty Foods	3,000
Medicinne Shoppe	Northridge NEW	NORTH	Pharmacy	1,500
Merle Norman	Strip Centre (east side of 99th south of 116th)	NORTH	Health & Beauty	1,250
Michael Hill Jewelers	Prairie Mall Unit 318	NORTH	Jewelry & Accessories	988
Michael's Flooring	Strip Centre 100th St (east side)	NORTH	Home Improvement & Gardening	10,000
Micro Computers Plus	Royal Oaks	NORTH	Home Electronics & Appliances	5,000
Mobilinq	Prairie Mall Unit 217	NORTH	Home Electronics & Appliances	638
Modern Beauty Supplies	Centre 100 Plaza	NORTH	Health & Beauty	3,000
Motivations Bridal Creations & Tailoring	Strip Centre (east side of 99th south of 116th)	NORTH	Personal Services	1,500
Motley Que Barbeque	Freestanding	NORTH	Home Improvement & Gardening	2,500
Moxie's Classic Grill	Prairie Mall Unit 212	NORTH	Full Service Restaurants	6,233
Mr. Mikes	Northridge Business Park	NORTH	Full Service Restaurants	8,000
Nails & Waxing	Central Square 100th St (west side)	NORTH	Personal Services	750
Nails n More	Strip Centre (east side of 99th south of 116th)	NORTH	Health & Beauty	750
New York Fries	Prairie Mall Unit 268	NORTH	Quick Service F&B	270
Nor-lan Chrysler Dodge Jeep RAM	100th Street	NORTH	Auto/RV/Motorsports Dealership	16,500
Nor-lan Used Centre	100th Street	NORTH	Auto/RV/Motorsports Dealership	12,000
Northern Gold & Diamonds	Bell Tower Plaza	NORTH	Jewelry & Accessories	1,500
Northern Heating & Fireplace	Strip Centre 100th St (east side)	NORTH	Home Improvement & Gardening	2,500
Northern Living Spaces	Strip Centre 100th St (west side)	NORTH	Home Furnishings & Décor	4,200
Northgate Honda New & Used	100th Street	NORTH	Auto/RV/Motorsports Dealership	21,500
Nu Floors Outlet	Freestanding	NORTH	Home Improvement & Gardening	3,000

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Retail Business Name Note: Shading reflects changes or new additions to the City's inventory since 2015/2016	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (SF)
OMG Cupcakes	KFC Plaza 100th St (east side)	NORTH	Quick Service F&B	750
Once Upon a Child (was Northern Blooms)	Royal Oak Strip Centre	NORTH	Specialty Retail	750
OPA	Prairie Mall Unit 264	NORTH	Quick Service F&B	436
Optometrist	KFC Plaza 100th St (east side)	NORTH	Personal Services	1,000
Orange Julius	Prairie Mall Unit 250	NORTH	Quick Service F&B	402
Orthodontics North (was NDHC Dental)	Prairie Plaza	NORTH	Personal Services	2,500
Padrino's (Best Western)	Royal Oaks Best Western Hotel	NORTH	Full Service Restaurants	3,000
Paris Jewelers	Prairie Mall Unit 292	NORTH	Jewelry & Accessories	1,426
Partners Naturally Dog Shop	Strip Centre 100th St (east side)	NORTH	Specialty Retail	1,500
Pat's Auto Parts	Freestanding	NORTH	Auto Parts & Accessories	10,000
Peace Country Graphics	Bell Tower Plaza	NORTH	Specialty Retail	2,000
People's Jewelers	Prairie Mall Unit 240	NORTH	Jewelry & Accessories	2,048
Pet Value	Centre 100 Plaza	NORTH	Specialty Retail	3,400
Pharmasave Medical Clinic	Oak Ridge Business Centre (NEW)	NORTH	Pharmacy	1,500
Pho House	Oak Ridge Business Centre (NEW)	NORTH	Full Service Restaurants	2,198
Pho One	Strip Centre 100th St (east side)	NORTH	Full Service Restaurants	2,000
Pinoy Sari Sar House	10017 110 Ave	NORTH	Grocery & Specialty Foods	500
Pizza Hut (was Tennesee Jack's Chicken & Ribs)	Royal Oak Strip Centre	NORTH	Quick Service F&B	1,500
Plaza Dental	Prairie Plaza	NORTH	Personal Services	2,000
Popeye's Supplements	Strip Centre 100th St (west side)	NORTH	Specialty Retail	1,500
Prairie Mall Dental	Prairie Mall Unit 216	NORTH	Personal Services	2,295
Prairie Sushi	Northridge Business Park	NORTH	Full Service Restaurants	4,000
Prestige Appliances	Royal Oaks - Freestanding	NORTH	Home Furnishings & Décor	15,000
Quaity Property Management	Strip Centre (east side of 99th south of 116th)	NORTH	Personal Services	1,000
Quality Vacuum	Central Square 100th St (west side)	NORTH	Home Improvement & Gardening	2,000
Quilts Etc	Prairie Mall Unit 110	NORTH	Specialty Retail	1,951
Radical Streetwear	Miscellaneous 100th St (west side)	NORTH	Clothing & Apparel	2,000
Real Canadian Superstore	Freestanding	NORTH	Auto Parts & Accessories	0
Real Canadian Superstore	Freestanding	NORTH	Books & Media	3,000
Real Canadian Superstore	Freestanding	NORTH	Clothing & Apparel	26,000
Real Canadian Superstore	Freestanding	NORTH	Footwear	2,000
Real Canadian Superstore	Freestanding	NORTH	Grocery & Specialty Foods	50,000
Real Canadian Superstore	Freestanding	NORTH	Health & Beauty	3,000
Real Canadian Superstore	Freestanding	NORTH	Home Electronics & Appliances	5,000
Real Canadian Superstore	Freestanding	NORTH	Home Furnishings & Décor	10,000
Real Canadian Superstore	Freestanding	NORTH	Home Improvement & Gardening	8,000
Real Canadian Superstore	Freestanding	NORTH	Jewelry & Accessories	5,000
Real Canadian Superstore	Freestanding	NORTH	Personal Services	3,000
Real Canadian Superstore	Freestanding	NORTH	Pharmacy	5,000
Real Canadian Superstore	Freestanding	NORTH	Quick Service F&B	1,000
Real Canadian Superstore	Freestanding	NORTH	Specialty Retail	3,000
Real Canadian Superstore	Freestanding	NORTH	Sporting Goods	3,000
Real Canadian Superstore	Freestanding	NORTH	Toys & Hobbies	3,000
Real Canadian Superstore Liquor	Freestanding	NORTH	Alcohol & Tobacco	7,000
Redline Powercraft	100th Street	NORTH	Auto/RV/Motorsports Dealership	10,000
Reversalife	Prairie Mall Unit 278	NORTH	Health & Beauty	982
Revolution Mazda	100th Street	NORTH	Auto/RV/Motorsports Dealership	13,400
Ricki's	Prairie Mall Unit 178	NORTH	Clothing & Apparel	4,463
Ricky's Grill	Prairie Ridge	NORTH	Full Service Restaurants	5,000
Rob's Electronic Repairs	Prairie Plaza	NORTH	Home Electronics & Appliances	1,000
Rocky Mountain Chocolate Factory	Prairie Mall Unit 276	NORTH	Quick Service F&B	313
Rogers Wireless	Prairie Mall Unit 134	NORTH	Specialty Retail	689
Royal Beauty Supplies	Bell Tower Plaza	NORTH	Health & Beauty	1,200
Royal Spirits	Royal Oak Strip Centre	NORTH	Alcohol & Tobacco	1,500
RW & Co	Prairie Mall Unit 108	NORTH	Clothing & Apparel	4,225
Safeway & Safeway Liquor Store	Safeway Plaza	NORTH	Grocery & Specialty Foods	56,000
Saje	Prairie Mall Unit 114	NORTH	Health & Beauty	1,332
Sapphire Health	Freestanding	NORTH	Personal Services	2,000
Sculptures Design Nail Studio	Strip Centre (east side of 99th south of 116th)	NORTH	Health & Beauty	750
Sean Sargent Toyota	Bypass	NORTH	Auto/RV/Motorsports Dealership	20,700
Sephora	Prairie Mall Unit 113	NORTH	Health & Beauty	3,923
Servus Credit Union	Northridge Business Park	NORTH	Personal Services	4,000
Sheffield & Son	Prairie Mall Unit 277	NORTH	Specialty Retail	319
Sherwin Williams	Royal Oaks	NORTH	Home Improvement & Gardening	3,000
Shoe Warehouse	Prairie Mall Unit 246A	NORTH	Footwear	3,032

Retail Business Name Note: Shading reflects changes or new additions to the City's inventory since 2015/2016	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (SF)
Shoppers Drug Mart	Prairie Mall Unit 137	NORTH	Pharmacy	14,844
Showcase	Prairie Mall Unit 186	NORTH	Specialty Retail	1,518
Sizzling Wok	Prairie Mall Unit 256	NORTH	Quick Service F&B	394
Skyline Micro Systems	Bell Tower Plaza	NORTH	Home Electronics & Appliances	2,000
Smokers Corner	KFC Plaza 100th St (east side)	NORTH	Alcohol & Tobacco	1,000
Soft Moc	Prairie Mall Unit 288	NORTH	Footwear	2,564
Solo Liquor	Centre 100 Plaza	NORTH	Alcohol & Tobacco	6,000
Source	Prairie Mall Unit 139	NORTH	Home Electronics & Appliances	2,136
Spencer's Gifts	Prairie Mall Unit 297	NORTH	Specialty Retail	1,496
Splatter Paintball	Strip Centre 100th St (west side)	NORTH	Arts & Entertainment	1,000
Starbucks	Prairie Mall Unit 362	NORTH	Quick Service F&B	388
Stitch n Dance	Strip Centre (east side of 99th south of 116th)	NORTH	Specialty Retail	1,000
Stokes	Prairie Mall Unit 219	NORTH	Home Furnishings & Décor	1,546
Strange Ideas Comics & Collectibles	Prairie Plaza	NORTH	Specialty Retail	1,500
Subway	Northridge Business Park	NORTH	Quick Service F&B	1,500
Subway	Prairie Mall Unit 254	NORTH	Quick Service F&B	387
Sun Capsule Health & Fitness	Central Square 100th St (west side)	NORTH	Fitness & Leisure	5,000
Sunrise Records	Prairie Mall Unit 246C	NORTH	Books & Media	2,443
Suzy Shier	Prairie Mall Unit 246F	NORTH	Clothing & Apparel	2,722
T&T Nails	Prairie Mall Unit 316	NORTH	Personal Services	806
Taco Time	Northridge Business Park	NORTH	Quick Service F&B	1,500
Taco Time	Prairie Mall Unit 258	NORTH	Quick Service F&B	394
Telus	Prairie Mall Unit 117	NORTH	Specialty Retail	1,059
Things Engraved	Prairie Mall Unit K4	NORTH	Jewelry & Accessories	200
Tim Horton's	Prairie Ridge	NORTH	Quick Service F&B	2,500
Tim Hortons	Northridge Business Park	NORTH	Quick Service F&B	3,000
Tim Hortons	Prairie Mall Unit 262	NORTH	Quick Service F&B	388
Tirecraft Auto	Freestanding	NORTH	Auto Parts & Accessories	5,500
Tommy Gun's	Prairie Mall Unit 138	NORTH	Health & Beauty	1,464
Tony Romas	Royal Oaks	NORTH	Full Service Restaurants	7,000
Toyz Emporium	Centre 100 Plaza	NORTH	Toys & Hobbies	1,500
Tracey's Treasures	Freestanding	NORTH	Specialty Retail	2,000
Trapped Escape Room (was Cooperators)	KFC Plaza 100th St (east side)	NORTH	Arts & Entertainment	2,000
Trumps VLT Lounge & Liquor Store	Northridge Business Park	NORTH	Alcohol & Tobacco	10,000
UPS Store	Bell Tower Plaza	NORTH	Specialty Retail	1,200
Urban Lengths Salon	Bell Tower Plaza	NORTH	Health & Beauty	1,500
Urban Planet	Prairie Mall Unit 350	NORTH	Clothing & Apparel	21,646
Urban Trail	Prairie Mall Unit 234	NORTH	Footwear	1,296
VACANT	Centre 100 Plaza	NORTH	**VACANT**	1,750
VACANT	Prairie Mall Unit 102	NORTH	**VACANT**	1,907
VACANT	Prairie Mall Unit 170	NORTH	**VACANT**	1,473
VACANT	Prairie Mall Unit 295	NORTH	**VACANT**	430
VACANT	Prairie Mall Unit 296	NORTH	**VACANT**	350
VACANT	Prairie Mall Unit 360	NORTH	**VACANT**	1,582
VACANT	Prairie Mall Unit 366	NORTH	**VACANT**	2,159
VACANT	Prairie Mall Unit 368	NORTH	**VACANT**	1,183
VACANT	Prairie Mall Unit 369	NORTH	**VACANT**	1,183
VACANT	Prairie Mall Unit 370	NORTH	**VACANT**	1,093
VACANT	Prairie Mall Unit 372	NORTH	**VACANT**	2,159
VACANT	Prairie Mall Unit 372	NORTH	**VACANT**	2,159
VACANT	Safeway Plaza	NORTH	**VACANT**	1,659
VACANT (Brick Clearance Closing)	Freestanding	NORTH	**VACANT**	22,500
VACANT (Jonathon's Gold & Diamonds Closing)	Prairie Mall Unit 132	NORTH	**VACANT**	882
VACANT (Manhattan Clothing Closing)	Prairie Mall Unit 194B	NORTH	**VACANT**	2,563
VACANT (Storage)	Prairie Mall Unit 340	NORTH	**VACANT**	15,867
VACANT (upon Canadian Tire relocating)	Canadian Tire Plaza (east side of 99th St)	NORTH	**VACANT**	100,000
VACANT (was Auto Canada Used Superstore)	Freestanding	NORTH	**VACANT**	3,500
VACANT (was Barry's Variety Store)	Strip Centre (west side of 99th south of 116th)	NORTH	**VACANT**	3,500
VACANT (was Black Dalia Tattoo)	Strip Centre (east side of 99th south of 116th)	NORTH	**VACANT**	1,000
VACANT (was Charlie's Girls Hair)	Prairie Ridge	NORTH	**VACANT**	1,000
VACANT (was Herbal One)	Centre 100 Plaza	NORTH	**VACANT**	1,000
VACANT (was Insta Loans)	Centre 100 Plaza	NORTH	**VACANT**	500
VACANT (was JNJ Cuisine Filipino Food)	Strip Centre (west side of 99th south of 116th)	NORTH	**VACANT**	3,500
VACANT (was Live 2 Play)	Centre 100 Plaza	NORTH	**VACANT**	10,000
VACANT (was Reliant Travel)	Royal Oak (NEW)	NORTH	**VACANT**	1,000

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VACANT (was Sears - rumored to be Cabela's)	Prairie Ridge	NORTH	**VACANT**	105,483
VACANT (was Stitch n Dance)	Centre 100 Plaza	NORTH	**VACANT**	750
Vacuum Shop	Strip Centre (east side of 99th south of 116th)	NORTH	Specialty Retail	1,500
Value Village	Canadian Tire Plaza (east side of 99th St)	NORTH	Clothing & Apparel	18,750
Virgin Mobile	Prairie Mall Unit K5	NORTH	Specialty Retail	200
Visique	Prairie Mall Unit 168	NORTH	Personal Services	1,642
WA Sushi	Royal Oak Strip Centre	NORTH	Quick Service F&B	1,000
Walk Run & More (was Curio)	Prairie Plaza	NORTH	Footwear	2,000
Warehouse One Jeans	Prairie Plaza	NORTH	Clothing & Apparel	3,000
Watsons Photo Source	Prairie Plaza North	NORTH	Home Electronics & Appliances	1,500
Wendy's	Freestanding	NORTH	Quick Service F&B	3,000
Western RV Country	100th Street	NORTH	Auto/RV/Motorsports Dealership	7,500
Windsor Ford NEW (relocating & opening 2019)	Trader Ridge 100th Street	NORTH	Auto/RV/Motorsports Dealership	95,000
Windsor Motorsports	100th Street	NORTH	Auto/RV/Motorsports Dealership	6,700
Winstons Health & Fitness (beside Beachcomber)	Freestanding	NORTH	Fitness & Leisure	3,000
Wireless Wave	Prairie Mall Unit K1	NORTH	Specialty Retail	180
Woody's RV World	100th Street	NORTH	Auto/RV/Motorsports Dealership	23,500
9Round Fitness (was Vacant)	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Fitness & Leisure	1,500
Anytime Fitness	South 40 84th & Hwy 40 / 108th St	SOUTH	Fitness & Leisure	5,000
ATB Financial	Mission Heights 68th Ave & Mission Heights	SOUTH	Personal Services	5,000
Babe Beauty	Grande Banks Stone Ridge	SOUTH	Personal Services	1,500
Bear Creek Liquor Centre	Mission Heights 68th Ave & Mission Heights	SOUTH	Alcohol & Tobacco	1,500
Bell	South 40 84th & Hwy 40 / 108th St	SOUTH	Specialty Retail	750
Booster Juice	Mission Heights 68th Ave & Mission Heights	SOUTH	Quick Service F&B	800
Carls Jr	South 40 84th & Hwy 40 / 108th St	SOUTH	Quick Service F&B	3,500
Cheap Smokes	South 40 84th & Hwy 40 / 108th St	SOUTH	Alcohol & Tobacco	750
Cheeky Chic Boutique	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Clothing & Apparel	1,000
Circle K Convenience	68th Ave & O'Brien/Pine	SOUTH	Grocery & Specialty Foods	3,000
Circle K Convenience	Mission Heights Crossing	SOUTH	Grocery & Specialty Foods	1,500
Circle K Convenience	Patterson Mall 84th Ave & Patterson Dr	SOUTH	Grocery & Specialty Foods	2,000
Circle K Convenience	Railtown 84th & Resources Rd	SOUTH	Grocery & Specialty Foods	2,000
COOP Conenience	Grande Banks Freestanding	SOUTH	Grocery & Specialty Foods	2,000
COOP Liquor	Grande Banks Freestanding	SOUTH	Alcohol & Tobacco	3,000
Cora's	South 40 84th & Hwy 40 / 108th St	SOUTH	Full Service Restaurants	2,000
Country Club Animal Clinic	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Personal Services	2,000
Crown & Anchor Pub	Southview 84th Ave & 100th St	SOUTH	Drinking Establishments	8,000
Cupcakes	South 40 84th & Hwy 40 / 108th St	SOUTH	Quick Service F&B	1,200
Daddio's Pizzeria	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Quick Service F&B	1,000
Dairy Queen	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Quick Service F&B	2,000
Domino's Pizza	Grande Banks on 68th	SOUTH	Quick Service F&B	1,978
EDO	South 40 84th & Hwy 40 / 108th St	SOUTH	Quick Service F&B	1,000
Edward Jones	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Personal Services	1,000
El Surenos (replaced Wannawaffle)	Eastlink Centre	SOUTH	Quick Service F&B	300
Europa Meat Shop	South 40 84th & Hwy 40 / 108th St	SOUTH	Grocery & Specialty Foods	1,000
Famoso Pizza	South 40 84th & Hwy 40 / 108th St	SOUTH	Quick Service F&B	1,500
Fas Gas Short Stop	84th & 116th	SOUTH	Grocery & Specialty Foods	1,500
First Choice Haircutters	South 40 84th & Hwy 40 / 108th St	SOUTH	Personal Services	1,200
GP Alterations (was Fabutan)	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Personal Services	1,000
Grains Bakery Café	Grande Banks Stone Ridge	SOUTH	Quick Service F&B	2,500
Grande Prairie Wine & Spirits	Westpoint @ 84th	SOUTH	Alcohol & Tobacco	2,000
Harvey's	Grande Banks Stone Ridge	SOUTH	Quick Service F&B	3,500
Head Room Salon	Mission Heights 68th Ave & Mission Heights	SOUTH	Health & Beauty	1,000
IDA Pharmacy	Grande Banks on 68th	SOUTH	Pharmacy	4,391
IGA Fresons	Southview 84th Ave & 100th St	SOUTH	Grocery & Specialty Foods	34,000
Joey's Urban Taqueria	Mission Heights 68th Ave & Mission Heights	SOUTH	Full Service Restaurants	1,000
Jugo Juice	Eastlink Centre	SOUTH	Quick Service F&B	300
L'il Sprouts Pre-School	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Personal Services	750
Liquor Barn	Resource Plaza 76th Ave & Resource Rd	SOUTH	Alcohol & Tobacco	4,000
Liquor Depot	Patterson Mall 84th Ave & Patterson Dr	SOUTH	Alcohol & Tobacco	5,500
Liquor Depot	Southview 84th Ave & 100th St	SOUTH	Alcohol & Tobacco	4,000
Liquor Locker	Freestanding Hwy 40 / 108th St (west side)	SOUTH	Alcohol & Tobacco	1,500
Liquor Plus	84th & 116th	SOUTH	Alcohol & Tobacco	2,000
Little Caesars (was Sangsters)	Grande Banks Stone Ridge	SOUTH	Quick Service F&B	1,000
Mac's Convenience	Resource Plaza 76th Ave & Resource Rd	SOUTH	Grocery & Specialty Foods	3,000
Manila's Best Kitchen (was Vacant)	Mission Heights Crossing	SOUTH	Quick Service F&B	1,500

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McDonalds	South 40 84th & Hwy 40 / 108th St	SOUTH	Quick Service F&B	5,000
Memphis Blues	South 40 84th & Hwy 40 / 108th St	SOUTH	Quick Service F&B	1,200
Menchies	Mission Heights 68th Ave & Mission Heights	SOUTH	Quick Service F&B	1,000
Miss Modern Boutique	South 40 84th & Hwy 40 / 108th St	SOUTH	Clothing & Apparel	1,000
No Frills	South 40 84th & Hwy 40 / 108th St	SOUTH	Grocery & Specialty Foods	30,000
Oranj Fitness	Grande Banks on 68th	SOUTH	Fitness & Leisure	6,500
Original Joes	South 40 84th & Hwy 40 / 108th St	SOUTH	Full Service Restaurants	3,000
Papa John's	Southview 84th Ave & 100th St	SOUTH	Quick Service F&B	2,000
Papa Murphy's	South 40 84th & Hwy 40 / 108th St	SOUTH	Quick Service F&B	1,000
Pet Valu	South 40 84th & Hwy 40 / 108th St	SOUTH	Specialty Retail	2,500
Pizza Hut/Wing Street	Patterson Mall 84th Ave & Patterson Dr	SOUTH	Quick Service F&B	2,500
Pizza73	Mission Heights 68th Ave & Mission Heights	SOUTH	Quick Service F&B	1,000
Prairie Gold Jewelry (was Gears Fitness)	South 40 84th & Hwy 40 / 108th St	SOUTH	Specialty Retail	1,000
Ramona's Pizza	Railtown 84th & Resources Rd	SOUTH	Full Service Restaurants	4,000
RBC	South 40 84th & Hwy 40 / 108th St	SOUTH	Personal Services	5,000
Real Canadian Liquorstore	South 40 84th & Hwy 40 / 108th St	SOUTH	Alcohol & Tobacco	4,000
Red Rock Urban BBQ	Grande Banks Stone Ridge	SOUTH	Full Service Restaurants	2,000
Royal Spirits	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Alcohol & Tobacco	2,500
Safeway	Southview 84th Ave & 100th St	SOUTH	Grocery & Specialty Foods	45,000
Second Cup	Eastlink Centre	SOUTH	Quick Service F&B	300
Servus Credit Union	South 40 84th & Hwy 40 / 108th St	SOUTH	Personal Services	3,500
Shell Select	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Grocery & Specialty Foods	750
Shell Select	Freestanding Hwy 40 / 108th St (west side)	SOUTH	Grocery & Specialty Foods	2,500
Shoppers Drug Mart	South 40 84th & Hwy 40 / 108th St	SOUTH	Pharmacy	17,000
Shoppers Home Health Care	Patterson Mall 84th Ave & Patterson Dr	SOUTH	Pharmacy	8,000
Short Stop Fas Gas	Westpoint @ 84th	SOUTH	Grocery & Specialty Foods	1,000
Smartphone Medic	South 40 84th & Hwy 40 / 108th St	SOUTH	Personal Services	1,458
Snap Fitness	Mission Heights 68th Ave & Mission Heights	SOUTH	Fitness & Leisure	3,000
Solo Liquor	Railtown 84th & Resources Rd	SOUTH	Alcohol & Tobacco	3,250
South 40 Dental	South 40 84th & Hwy 40 / 108th St	SOUTH	Personal Services	3,000
Southside Pharmacy	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Pharmacy	1,250
Starbucks	Mission Heights 68th Ave & Mission Heights	SOUTH	Quick Service F&B	1,500
Starbucks	Railtown 84th & Resources Rd	SOUTH	Quick Service F&B	1,500
Starbucks (was Second Cup)	South 40 84th & Hwy 40 / 108th St	SOUTH	Quick Service F&B	1,250
State & Main Kitchen	Southview 84th Ave & 100th St	SOUTH	Full Service Restaurants	5,000
Strands Styling	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Health & Beauty	1,000
Style 6 Hair Salon (was Light Works Aesthetics)	Patterson Mall 84th Ave & Patterson Dr	SOUTH	Personal Services	1,000
Subway	Grande Banks on 68th	SOUTH	Quick Service F&B	2,000
Subway	Railtown 84th & Resources Rd	SOUTH	Quick Service F&B	2,000
Subway	South 40 84th & Hwy 40 / 108th St	SOUTH	Quick Service F&B	1,500
Supplement King	Mission Heights 68th Ave & Mission Heights	SOUTH	Grocery & Specialty Foods	800
T&T Nails	South 40 84th & Hwy 40 / 108th St	SOUTH	Personal Services	1,200
Tayo Vietnamese (was Vacant)	Mission Heights 68th Ave & Mission Heights	SOUTH	Full Service Restaurants	1,000
The Headroom Salon	Mission Heights 68th Ave & Mission Heights	SOUTH	Personal Services	1,000
Tim Hortons	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Quick Service F&B	2,250
Tim Hortons	South 40 84th & Hwy 40 / 108th St	SOUTH	Quick Service F&B	3,500
Tip Top Barbershop	South 40 84th & Hwy 40 / 108th St	SOUTH	Health & Beauty	750
Tito's Fresh Healthy Food	Eastlink Centre	SOUTH	Quick Service F&B	300
VACANT	Grande Banks on 68th	SOUTH	**VACANT**	2,445
Spice Hut	Grande Banks on 68th	SOUTH	Full Service Restaurants	2,033
VACANT	South 40 84th & Hwy 40 / 108th St	SOUTH	**VACANT**	1,200
VACANT	South 40 84th & Hwy 40 / 108th St	SOUTH	**VACANT**	1,900
VACANT	South 40 84th & Hwy 40 / 108th St	SOUTH	**VACANT**	1,900
VACANT	South 40 84th & Hwy 40 / 108th St	SOUTH	**VACANT**	1,630
VACANT	South 40 84th & Hwy 40 / 108th St	SOUTH	**VACANT**	1,120
VACANT	Southview 84th Ave & 100th St	SOUTH	**VACANT**	1,700
VACANT (was Cat B Lou Styling)	Southview 84th Ave & 100th St	SOUTH	**VACANT**	1,000
VACANT (was Eservus)	Patterson Mall 84th Ave & Patterson Dr	SOUTH	**VACANT**	6,000
VACANT (was Great Canadian Dollar Store)	Southview 84th Ave & 100th St	SOUTH	**VACANT**	6,000
VACANT (was Hair T's)	Southview 84th Ave & 100th St	SOUTH	**VACANT**	1,000
VACANT (was LA Heat & Tanning)	Southview 84th Ave & 100th St	SOUTH	**VACANT**	2,000
VACANT (was Subway)	Mission Heights 68th Ave & Mission Heights	SOUTH	**VACANT**	1,000
Butter Chicken Co	Mission Heights 68th Ave & Mission Heights	SOUTH	Quick Service F&B	1,000
VACANT Grande Banks Seafood Restaurant Closir	Grande Banks on 68th	SOUTH	**VACANT**	2,368
Vintage Wine & Spirits	100th & 88th St	SOUTH	Alcohol & Tobacco	1,000

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Westman's Barbershop & Espresso	Grande Banks Stone Ridge	SOUTH	Personal Services	1,000
Wing 'n it	Grande Banks on 68th	SOUTH	Quick Service F&B	2,400
Yogarty's Frozen Yogurt	South 40 84th & Hwy 40 / 108th St	SOUTH	Quick Service F&B	1,458
A&W	Brochu Industrial	WEST	Quick Service F&B	3,000
A&W	Freestanding	WEST	Quick Service F&B	3,000
Addition Elle	RioCan Grande Prairie	WEST	Clothing & Apparel	4,000
Alpine Water	Centre West Plaza	WEST	Grocery & Specialty Foods	1,500
ATB Financial	Westside Plaza	WEST	Personal Services	10,300
Bed Bath & Beyond	Westgate Centre	WEST	Home Furnishings & Décor	17,000
Best Buy	Power Centre	WEST	Home Electronics & Appliances	25,800
BMO	Westside Plaza	WEST	Personal Services	8,300
Bone n Biscuit	Westgate Centre	WEST	Specialty Retail	1,000
Booster Juice	Save On Foods Plaza	WEST	Quick Service F&B	750
Booster Juice	Westgate Centre - Monaco Square	WEST	Quick Service F&B	1,150
Boston Pizza	Westgate Power Centre	WEST	Full Service Restaurants	7,659
Bowling Stones 10 Pin Bowling	Freestanding	WEST	Arts & Entertainment	10,000
Brick	Westgate Power Centre	WEST	Home Furnishings & Décor	25,000
Broken Oak Distillery (was Grande Prairie Brewing Co	100th Ave	WEST	Alcohol & Tobacco	5,000
Brown's Social House	Westgate Centre	WEST	Full Service Restaurants	3,000
Bulk Barn	Westgate Centre	WEST	Specialty Retail	5,000
Burger Heaven	Power Centre	WEST	Quick Service F&B	1,500
Burger King	RioCan Grande Prairie	WEST	Quick Service F&B	3,618
Burrito Zone/Pizza Depot	RioCan Grande Prairie	WEST	Quick Service F&B	1,000
Canada Post	RioCan Grande Prairie	WEST	Personal Services	2,000
Canadian Brewhouse	RioCan Grande Prairie	WEST	Drinking Establishments	8,114
Canadian Tire **(NEW)**	Westgate Centre	WEST	Auto Parts & Accessories	51,900
Canadian Tire **(NEW)**	Westgate Centre	WEST	Books & Media	0
Canadian Tire **(NEW)**	Westgate Centre	WEST	Clothing & Apparel	1,730
Canadian Tire **(NEW)**	Westgate Centre	WEST	Footwear	865
Canadian Tire **(NEW)**	Westgate Centre	WEST	Grocery & Specialty Foods	0
Canadian Tire **(NEW)**	Westgate Centre	WEST	Health & Beauty	5,190
Canadian Tire **(NEW)**	Westgate Centre	WEST	Home Electronics & Appliances	12,110
Canadian Tire **(NEW)**	Westgate Centre	WEST	Home Furnishings & Décor	43,250
Canadian Tire **(NEW)**	Westgate Centre	WEST	Home Improvement & Gardening	0
Canadian Tire **(NEW)**	Westgate Centre	WEST	Jewelry & Accessories	0
Canadian Tire **(NEW)**	Westgate Centre	WEST	Personal Services	0
Canadian Tire **(NEW)**	Westgate Centre	WEST	Pharmacy	865
Canadian Tire **(NEW)**	Westgate Centre	WEST	Quick Service F&B	0
Canadian Tire **(NEW)**	Westgate Centre	WEST	Specialty Retail	8,650
Canadian Tire **(NEW)**	Westgate Centre	WEST	Sporting Goods	31,140
Canadian Tire **(NEW)**	Westgate Centre	WEST	Toys & Hobbies	17,300
Canadian Western Bank	Westgate Power Centre	WEST	Personal Services	8,000
Carters Osh Kosk	Westgate Centre	WEST	Clothing & Apparel	1,750
Castaspella Boutique	RioCan Grande Prairie	WEST	Clothing & Apparel	3,636
China Rose	Westside Plaza	WEST	Quick Service F&B	1,500
Chopped Leaf Salads	RioCan Grande Prairie	WEST	Quick Service F&B	1,292
CIBC	Power Centre	WEST	Personal Services	7,300
Cineplex Odeon	RioCan Grande Prairie	WEST	Arts & Entertainment	75,000
COSTCO	Centre West Business Park	WEST	Auto Parts & Accessories	15,000
COSTCO	Centre West Business Park	WEST	Books & Media	625
COSTCO	Centre West Business Park	WEST	Clothing & Apparel	3,750
COSTCO	Centre West Business Park	WEST	Footwear	0
COSTCO	Centre West Business Park	WEST	Grocery & Specialty Foods	83,750
COSTCO	Centre West Business Park	WEST	Health & Beauty	1,250
COSTCO	Centre West Business Park	WEST	Home Electronics & Appliances	7,500
COSTCO	Centre West Business Park	WEST	Home Furnishings & Décor	2,500
COSTCO	Centre West Business Park	WEST	Home Improvement & Gardening	2,500
COSTCO	Centre West Business Park	WEST	Jewelry & Accessories	313
COSTCO	Centre West Business Park	WEST	Personal Services	1,563
COSTCO	Centre West Business Park	WEST	Pharmacy	1,563
COSTCO	Centre West Business Park	WEST	Quick Service F&B	938
COSTCO	Centre West Business Park	WEST	Specialty Retail	1,250
COSTCO	Centre West Business Park	WEST	Sporting Goods	1,250
COSTCO	Centre West Business Park	WEST	Toys & Hobbies	1,250
Countryside Motorsports	Vision West Business Park	WEST	Auto/RV/Motorsports Dealership	25,000

Retail Business Name Note: Shading reflects changes or new additions to the City's inventory since 2015/2016	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (SF)
Den Carvery (was Zone Sports Grill)	Freestanding	WEST	Full Service Restaurants	6,000
Dental West GP	Westgate Centre - Monaco Square	WEST	Personal Services	3,000
Dollar Tree	Westgate Centre	WEST	Specialty Retail	8,000
Dollarama	RioCan Grande Prairie	WEST	Specialty Retail	12,539
Domino's Pizza	College Park 100th Ave & 106th St	WEST	Quick Service F&B	2,500
Dulux Paint	Vision West Business Park	WEST	Home Improvement & Gardening	1,500
Easy Financial	RioCan Grande Prairie	WEST	Personal Services	1,225
EB Games	RioCan Grande Prairie	WEST	Home Electronics & Appliances	1,540
EDO Japanese	Power Centre	WEST	Quick Service F&B	750
Euphoria Paradise	RioCan Grande Prairie	WEST	Personal Services	1,200
Fabricland	Save On Foods Plaza	WEST	Specialty Retail	10,000
Fatburger	Save On Foods Plaza	WEST	Quick Service F&B	2,500
Firecrust Pizza	Save On Foods Plaza	WEST	Quick Service F&B	1,250
Five Guys Burgers & Fries	Westgate Power Centre	WEST	Quick Service F&B	2,000
Freshii (was U Weight Loss Clinic)	Power Centre	WEST	Quick Service F&B	1,000
Fusion Cup	Power Centre	WEST	Quick Service F&B	1,000
Gap Factory Outlet	Westgate Centre	WEST	Clothing & Apparel	6,500
GNC	Power Centre	WEST	Specialty Retail	1,000
Goodwill Centre	RioCan Grande Prairie	WEST	Specialty Retail	1,000
Grande Granite	Vision West Business Park	WEST	Home Improvement & Gardening	1,500
Grande Prairie Chrysler Dodge Jeep RAM	Westgate Power Centre	WEST	Auto/RV/Motorsports Dealership	28,000
Grande Prairie Convenience (Petro Canada)	Brochu Industrial	WEST	Grocery & Specialty Foods	2,500
Grande Prairie Ford (Hansen)	Westgate Power Centre	WEST	Auto/RV/Motorsports Dealership	18,300
Grande Prairie Hyundai	Westgate Power Centre	WEST	Auto/RV/Motorsports Dealership	7,000
Grande Prairie KIA	Vision West Business Park	WEST	Auto/RV/Motorsports Dealership	10,000
Grande Prairie Mitsubishi	Westgate Power Centre	WEST	Auto/RV/Motorsports Dealership	12,500
Grande Prairie Subaru	Westgate Power Centre	WEST	Auto/RV/Motorsports Dealership	12,500
Great Clips	RioCan Grande Prairie	WEST	Health & Beauty	1,000
Great Northern Casino	Freestanding	WEST	Arts & Entertainment	20,000
Harvey's	Westgate Centre	WEST	Quick Service F&B	2,000
Home Depot	Westgate Power Centre	WEST	Home Improvement & Gardening	100,000
Home Hardware	Freestanding	WEST	Home Improvement & Gardening	25,000
Home Sense	Westgate Centre	WEST	Home Furnishings & Décor	20,000
Homesteader Health	RioCan Grande Prairie	WEST	Grocery & Specialty Foods	5,000
Humpty's	NEW	WEST	Full Service Restaurants	2,000
Husky Corner Store	RioCan Grande Prairie	WEST	Grocery & Specialty Foods	1,000
Intersport	Power Centre	WEST	Sporting Goods	8,000
Janina's Jewelers	Westgate Centre - Monaco Square	WEST	Jewelry & Accessories	3,000
Jax Grill	Industrial 97th Ave & 112 St	WEST	Full Service Restaurants	4,500
Jeffrey's Café	Westside Plaza	WEST	Quick Service F&B	6,000
Jenny Craig	RioCan Grande Prairie	WEST	Personal Services	2,215
Jimmy's Liquor	100th Ave	WEST	Alcohol & Tobacco	2,000
Justice	Westgate Centre	WEST	Clothing & Apparel	5,500
JYSK	RioCan Grande Prairie	WEST	Home Furnishings & Décor	15,728
Keg Steakhouse	College Park 100th Ave & 106th St	WEST	Full Service Restaurants	5,500
KFC	College Park 100th Ave & 106th St	WEST	Quick Service F&B	2,500
King of Donair	RioCan Grande Prairie	WEST	Quick Service F&B	1,200
LA Heat Tanning	RioCan Grande Prairie	WEST	Personal Services	2,360
La Vie en Rose	Westgate Centre	WEST	Clothing & Apparel	5,300
Liquor Depot	Save On Foods Plaza	WEST	Alcohol & Tobacco	2,500
Liquor Depot	Westgate Centre	WEST	Alcohol & Tobacco	4,000
Liquor Plus	College Park 100th Ave & 106th St	WEST	Alcohol & Tobacco	1,500
London Drugs	RioCan Grande Prairie	WEST	Auto Parts & Accessories	318
London Drugs	RioCan Grande Prairie	WEST	Books & Media	1,590
London Drugs	RioCan Grande Prairie	WEST	Clothing & Apparel	795
London Drugs	RioCan Grande Prairie	WEST	Footwear	3,180
London Drugs	RioCan Grande Prairie	WEST	Grocery & Specialty Foods	5,724
London Drugs	RioCan Grande Prairie	WEST	Health & Beauty	6,360
London Drugs	RioCan Grande Prairie	WEST	Home Electronics & Appliances	3,180
London Drugs	RioCan Grande Prairie	WEST	Home Furnishings & Décor	0
London Drugs	RioCan Grande Prairie	WEST	Home Improvement & Gardening	0
London Drugs	RioCan Grande Prairie	WEST	Jewelry & Accessories	0
London Drugs	RioCan Grande Prairie	WEST	Personal Services	7,950
London Drugs	RioCan Grande Prairie	WEST	Pharmacy	0
London Drugs	RioCan Grande Prairie	WEST	Quick Service F&B	0

A

Retail Business Name Note: Shading reflects changes or new additions to the City's inventory since 2015/2016	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (SF)
London Drugs	RioCan Grande Prairie	WEST	Specialty Retail	1,590
London Drugs	RioCan Grande Prairie	WEST	Sporting Goods	318
London Drugs	RioCan Grande Prairie	WEST	Toys & Hobbies	795
Love Boutique	RioCan Grande Prairie	WEST	Clothing & Apparel	750
M&M Meat Shops	RioCan Grande Prairie	WEST	Grocery & Specialty Foods	750
Marks WorkWearhouse	Power Centre	WEST	Clothing & Apparel	20,508
Mary Brown's Chicken	RioCan Grande Prairie	WEST	Quick Service F&B	750
Massage Experts	Westgate Centre - Monaco Square	WEST	Personal Services	2,280
Master Cuts	Westgate Centre	WEST	Health & Beauty	750
Mastermind Toys	Westgate Centre	WEST	Toys & Hobbies	5,307
McDonalds	Freestanding	WEST	Quick Service F&B	3,000
Michaels Crafts	RioCan Grande Prairie	WEST	Specialty Retail	24,180
Mint Health & Drugs	NEW	WEST	Pharmacy	2,000
Monaco Shoes	Westgate Centre - Monaco Square	WEST	Footwear	1,500
Money Mart	RioCan Grande Prairie	WEST	Specialty Retail	750
Monica's Restaurant (Stafford Inn)	Centre West Business Park	WEST	Full Service Restaurants	5,000
Montana's (was Swiss Chalet)	RioCan Grande Prairie	WEST	Full Service Restaurants	5,000
Moore's Clothing for Men	Westgate Centre - Monaco Square	WEST	Clothing & Apparel	2,000
Motion Fitness (was Winners)	RioCan Grande Prairie	WEST	Fitness & Leisure	23,505
Mucho Burrito	Power Centre	WEST	Quick Service F&B	1,000
NAPA Auto Parts	Industrial 97th Ave & 112 St	WEST	Auto Parts & Accessories	4,000
Nevada Bobs	Westgate Power Centre	WEST	Sporting Goods	12,000
Nova Cannabis (Liquor Depot)	RioCan Grande Prairie	WEST	Alcohol & Tobacco	2,829
Old Navy	Westgate Centre	WEST	Clothing & Apparel	13,500
Olympia Liquor	RioCan Grande Prairie	WEST	Alcohol & Tobacco	3,429
OPA Greek	Power Centre	WEST	Quick Service F&B	1,000
Orange Theory Fitness	Westgate Centre - Monaco Square	WEST	Fitness & Leisure	2,000
Parkside Convenience Store	College Park 100th Ave & 106th St	WEST	Grocery & Specialty Foods	1,500
Party City	Westgate Centre	WEST	Specialty Retail	8,000
Payless Shoes	RioCan Grande Prairie	WEST	Footwear	2,000
Peavey Mart	Vision West Business Park	WEST	Home Improvement & Gardening	16,800
Penningtons	RioCan Grande Prairie	WEST	Clothing & Apparel	8,362
Petland	RioCan Grande Prairie	WEST	Specialty Retail	11,839
PetSmart	Power Centre	WEST	Specialty Retail	12,063
Pier 1 Imports	Westgate Centre	WEST	Home Furnishings & Décor	8,000
Planet Fitness (was Wholesale Sports)	RioCan Grande Prairie	WEST	Fitness & Leisure	20,000
Polite Society Clothing Co	Power Centre	WEST	Clothing & Apparel	1,000
Prairie Gold Jewelry	RioCan Grande Prairie	WEST	Jewelry & Accessories	2,500
Princess Auto	Vision West Business Park	WEST	Auto Parts & Accessories	15,000
Q Nails	RioCan Grande Prairie	WEST	Personal Services	1,509
Quizno's	Save On Foods Plaza	WEST	Quick Service F&B	1,000
Red Wing Shoes	Westgate Centre - Monaco Square	WEST	Footwear	1,500
Reitmans	RioCan Grande Prairie	WEST	Clothing & Apparel	6,122
Rogers	RioCan Grande Prairie	WEST	Specialty Retail	750
RONA	RioCan Grande Prairie	WEST	Home Improvement & Gardening	40,145
S3 Skate Snow Surf	Power Centre	WEST	Sporting Goods	8,000
Sally Beauty	Power Centre	WEST	Health & Beauty	1,000
Save On Foods	Save On Foods Plaza	WEST	Grocery & Specialty Foods	40,000
Scotiabank	Power Centre	WEST	Personal Services	8,000
Season of Forty @ Holiday Inn	100th Ave	WEST	Full Service Restaurants	2,500
Shoe Company	Westgate Centre	WEST	Footwear	5,300
Sizzling Tandoori	Westgate Centre - Monaco Square	WEST	Full Service Restaurants	2,280
Sleep Country	Westgate Centre	WEST	Home Furnishings & Décor	5,000
SOJO Sushi	RioCan Grande Prairie	WEST	Quick Service F&B	2,000
Soleilki Asian Buffet	Westgate Centre - Monaco Square	WEST	Full Service Restaurants	2,500
SOLO Liquor	Westgate Power Centre	WEST	Alcohol & Tobacco	4,000
SOS Safety Supplies	Industrial 97th Ave & 112 St	WEST	Specialty Retail	2,000
Source	Westgate Centre	WEST	Home Electronics & Appliances	1,750
Sport Clips	Westgate Centre - Monaco Square	WEST	Personal Services	1,500
Staples	RioCan Grande Prairie	WEST	Specialty Retail	26,118
Starbucks	RioCan Grande Prairie	WEST	Quick Service F&B	2,009
Sticky's Candy	RioCan Grande Prairie	WEST	Grocery & Specialty Foods	1,000
Subway	Power Centre	WEST	Quick Service F&B	1,000
Subway	Save On Foods Plaza	WEST	Quick Service F&B	1,000
Suzannes & Jenny's	Westgate Centre - Monaco Square	WEST	Clothing & Apparel	1,500

Retail Business Name Note: Shading reflects changes or new additions to the City's inventory since 2015/2016	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (SF)
TD Bank	Westside Plaza	WEST	Personal Services	7,700
Telus/Koodo	Save On Foods Plaza	WEST	Specialty Retail	1,000
The Butcher Shop (was Esquires Coffee)	Westside Plaza	WEST	Grocery & Specialty Foods	2,000
Thyme Maternity	RioCan Grande Prairie	WEST	Clothing & Apparel	2,000
Tim Hortons	College Park 100th Ave & 106th St	WEST	Quick Service F&B	2,800
Tokyo Ichiban	RioCan Grande Prairie	WEST	Quick Service F&B	3,604
Tommy Gunn's Barber Shop	Power Centre	WEST	Health & Beauty	1,000
Urban Barn	Westgate Centre	WEST	Home Furnishings & Décor	5,500
VACANT	Westgate Centre - Monaco Square	WEST	**VACANT**	1,150
VACANT	Westgate Centre - Monaco Square	WEST	**VACANT**	1,150
VACANT	Westgate Centre - Monaco Square	WEST	**VACANT**	2,280
VACANT	Westgate Centre - Monaco Square	WEST	**VACANT**	2,280
VACANT (beside Brown's Social House)	Westgate Centre	WEST	**VACANT**	1,500
VACANT (was Believe Fit Active Lifestyle)	RioCan Grande Prairie	WEST	**VACANT**	2,500
VACANT (was Dad's Organic Market)	Centre West Plaza	WEST	**VACANT**	2,000
VACANT (was Guerino's Italian Kitchen)	Westside Plaza	WEST	**VACANT**	1,500
VACANT (was LUXE Home Furniture)	Vision West Business Park	WEST	**VACANT**	5,000
VACANT (was Pita Pit)	Save On Foods Plaza	WEST	**VACANT**	750
VACANT (was Tilted Kilt)	100th Ave	WEST	**VACANT**	4,800
VACANT Unit 102 (beside Walmart Centre)	RioCan Grande Prairie	WEST	**VACANT**	1,000
VACANT Unit 103 (beside Walmart Centre)	RioCan Grande Prairie	WEST	**VACANT**	1,000
VACANT Unit 110	RioCan Grande Prairie	WEST	**VACANT**	1,756
VACANT Unit 115	RioCan Grande Prairie	WEST	**VACANT**	1,257
VACANT Units 102 - 112	Centre West Plaza	WEST	**VACANT**	15,000
Visions Electronics	Vision West Business Park	WEST	Home Electronics & Appliances	15,000
Volkswagen	108th Street	WEST	Auto/RV/Motorsports Dealership	9,800
WalMart	RioCan Grande Prairie	WEST	Auto Parts & Accessories	15,000
WalMart	RioCan Grande Prairie	WEST	Books & Media	2,000
WalMart	RioCan Grande Prairie	WEST	Clothing & Apparel	50,000
WalMart	RioCan Grande Prairie	WEST	Footwear	3,000
WalMart	RioCan Grande Prairie	WEST	Grocery & Specialty Foods	50,000
WalMart	RioCan Grande Prairie	WEST	Health & Beauty	5,000
WalMart	RioCan Grande Prairie	WEST	Home Electronics & Appliances	15,000
WalMart	RioCan Grande Prairie	WEST	Home Furnishings & Décor	15,000
WalMart	RioCan Grande Prairie	WEST	Home Improvement & Gardening	10,000
WalMart	RioCan Grande Prairie	WEST	Jewelry & Accessories	2,500
WalMart	RioCan Grande Prairie	WEST	Personal Services	2,000
WalMart	RioCan Grande Prairie	WEST	Pharmacy	5,000
WalMart	RioCan Grande Prairie	WEST	Quick Service F&B	3,000
WalMart	RioCan Grande Prairie	WEST	Specialty Retail	12,500
WalMart	RioCan Grande Prairie	WEST	Sporting Goods	5,000
WalMart	RioCan Grande Prairie	WEST	Toys & Hobbies	5,000
Wapiti Bean Coffeee	Westgate Centre - Monaco Square	WEST	Quick Service F&B	2,000
Wendy's (Coming Soon)	Freestanding	WEST	Quick Service F&B	3,000
Whiskey House Liquor Store	Freestanding	WEST	Alcohol & Tobacco	1,500
Winners (was Vacant)	Power Centre	WEST	Clothing & Apparel	25,440
Wok Box	RioCan Grande Prairie	WEST	Quick Service F&B	1,752
Your Dollar Store	Save On Foods Plaza	WEST	Specialty Retail	6,000

Y2013-Y2016-Y2019 GRANDE PRAIRIE CONSUMER SURVEY RESULTS

INTERVIEW LOCATION * YEAR Crosstabulation

			YEAR			
			Y2013	Y2016	Y2019	Total
INTERVIEW LOCATION	PRAIRIE MALL	Count	175	150	102	427
		% within YEAR	87.5%	75.0%	51.0%	71.2%
	EASTLINK CENTRE	Count	0	50	48	98
		% within YEAR	0.0%	25.0%	24.0%	16.3%
	214 PLACE	Count	25	0	50	75
		% within YEAR	12.5%	0.0%	25.0%	12.5%
Total		Count	200	200	200	600
		% within YEAR	100.0%	100.0%	100.0%	100.0%

CITY RESPONDENT RESIDES * YEAR Crosstabulation

			YEAR			
			Y2013	Y2016	Y2019	Total
CITY RESPONDENT RESIDES	GRANDE PRAIRIE CITY	Count	118	130	144	392
		% within YEAR	59.0%	65.0%	72.0%	65.3%
	GRANDE PRAIRIE COUNTY	Count	29	22	12	63
		% within YEAR	14.5%	11.0%	6.0%	10.5%
	CLAIRMONT	Count	4	4	5	13
		% within YEAR	2.0%	2.0%	2.5%	2.2%
	BEAVERLODGE	Count	5	7	1	13
		% within YEAR	2.5%	3.5%	0.5%	2.2%
	SEXSMITH	Count	5	8	17	30
		% within YEAR	2.5%	4.0%	8.5%	5.0%
	OTHER CITY	Count	39	29	21	89
		% within YEAR	19.5%	14.5%	10.5%	14.8%
Total		Count	200	200	200	600
		% within YEAR	100.0%	100.0%	100.0%	100.0%

Q1A. PRIMARY CONVENIENCE SHOPPING CENTRE * YEAR Crosstabulation

			YEAR			Total
			Y2013	Y2016	Y2019	
Q1A. PRIMARY CONVENIENCE SHOPPING CENTRE	NO CONVENIENCE PRIMARY	Count	2	6	4	12
		% within YEAR	1.0%	3.0%	2.0%	2.0%
	WAL MART GP	Count	16	15	16	47
		% within YEAR	8.0%	7.5%	8.0%	7.8%
	RCSS GP	Count	40	58	61	159
		% within YEAR	20.0%	29.0%	30.5%	26.5%
	COSTCO GP	Count	32	36	32	100
		% within YEAR	16.0%	18.0%	16.0%	16.7%
	SAFEWAY GP S	Count	29	12	19	60
		% within YEAR	14.5%	6.0%	9.5%	10.0%
	SAFEWAY GP N	Count	22	26	15	63
		% within YEAR	11.0%	13.0%	7.5%	10.5%
	NO FRILLS GP	Count	12	16	22	50
		% within YEAR	6.0%	8.0%	11.0%	8.3%
	SAVE ON FOODS GP	Count	15	7	6	28
		% within YEAR	7.5%	3.5%	3.0%	4.7%
	IGA GP S	Count	4	5	2	11
		% within YEAR	2.0%	2.5%	1.0%	1.8%
	IGA GP N	Count	4	5	2	11
		% within YEAR	2.0%	2.5%	1.0%	1.8%
	GIANT TIGER	Count	0	2	2	4
		% within YEAR	0.0%	1.0%	1.0%	0.7%
	CO OP GP	Count	5	6	8	19
		% within YEAR	2.5%	3.0%	4.0%	3.2%
	DOWNTOWN GP	Count	0	0	1	1
		% within YEAR	0.0%	0.0%	0.5%	0.2%
	OTHER SC	Count	19	6	10	35
		% within YEAR	9.5%	3.0%	5.0%	5.8%
Total		Count	200	200	200	600
		% within YEAR	100.0%	100.0%	100.0%	100.0%

B

Report

Q1B. $ EXPENDITURE AT PRIMARY CONVENIENCE SC

YEAR	N	Minimum	Maximum	Mean	Std. Deviation	Sum
Y2013	199	30	2500	467.06	319.382	92945
Y2016	198	40	1750	459.14	256.963	90910
Y2019	199	40	1500	461.76	289.012	91890
Total	596	30	2500	462.66	289.159	275745

$Q1C*YEAR Crosstabulation

			YEAR			
			Y2013	Y2016	Y2019	Total
Q1C. MAIN REASONS SHOP PRIMARY CONVENIENCE SC - Multiple Response[a]	NO SPECIFIC REASON	Count	0	0	3	3
		% within YEAR	0.0%	0.0%	0.9%	
	CLOSE TO HOME	Count	95	66	156	317
		% within YEAR	21.6%	14.0%	44.6%	
	CLOSE WORK SCHOOL	Count	2	10	23	35
		% within YEAR	0.5%	2.1%	6.6%	
	PRICES	Count	88	94	16	198
		% within YEAR	20.0%	19.9%	4.6%	
	ONE STOP SHOP	Count	41	32	1	74
		% within YEAR	9.3%	6.8%	0.3%	
	NOT CROWDED	Count	1	1	1	3
		% within YEAR	0.2%	0.2%	0.3%	
	FAMILIARITY	Count	43	52	2	97
		% within YEAR	9.8%	11.0%	0.6%	
	PARKING	Count	2	2	5	9
		% within YEAR	0.5%	0.4%	1.4%	
	CUSTOMER SERVICE	Count	11	23	1	35
		% within YEAR	2.5%	4.9%	0.3%	
	SALES PROMOS	Count	34	34	12	80
		% within YEAR	7.7%	7.2%	3.4%	
	BUY IN BULK	Count	12	24	3	39
		% within YEAR	2.7%	5.1%	0.9%	
	SUPPORT LOCAL	Count	7	1	6	14
		% within YEAR	1.6%	0.2%	1.7%	
	SELECTION PRODUCTS	Count	33	49	4	86
		% within YEAR	7.5%	10.4%	1.1%	
	SELECTION STORES	Count	0	0	1	1
		% within YEAR	0.0%	0.0%	0.3%	
	SHOP SPECIFIC STORE	Count	0	0	3	3
		% within YEAR	0.0%	0.0%	0.9%	
	SPECIFIC ITEM BRAND	Count	6	36	5	47
		% within YEAR	1.4%	7.6%	1.4%	
	DAY OUT WINDOW SHOP	Count	0	0	2	2
		% within YEAR	0.0%	0.0%	0.6%	
	IN THE AREA	Count	0	2	1	3
		% within YEAR	0.0%	0.4%	0.3%	
	QUALITY PRODUCTS	Count	41	29	11	81
		% within YEAR	9.3%	6.1%	3.1%	
	CONVENIENCE ITEMS	Count	5	0	0	5
		% within YEAR	1.1%	0.0%	0.0%	
	CLOTHING	Count	1	0	0	1
		% within YEAR	0.2%	0.0%	0.0%	
	SHOES	Count	0	0	19	19
		% within YEAR	0.0%	0.0%	5.4%	
	MEETS NEEDS	Count	8	10	5	23
		% within YEAR	1.8%	2.1%	1.4%	
	GIFTS	Count	0	0	1	1
		% within YEAR	0.0%	0.0%	0.3%	
	PROXIMITY OTHER AREAS	Count	0	0	3	3
		% within YEAR	0.0%	0.0%	0.9%	
	QUALITY STORES	Count	4	0	0	4
		% within YEAR	0.9%	0.0%	0.0%	
	EASY ACCESS	Count	3	7	57	67
		% within YEAR	0.7%	1.5%	16.3%	
	HOURS OF OPERATION	Count	2	1	2	5
		% within YEAR	0.5%	0.2%	0.6%	
	NO TAXES	Count	0	0	5	5
		% within YEAR	0.0%	0.0%	1.4%	
	STORES CLUSTERED	Count	0	0	2	2
		% within YEAR	0.0%	0.0%	0.6%	
Total		Count	439	473	350	1262

Percentages and totals are based on responses.

a. Group

Q2A. PRIMARY COMPARISON SHOPPING CENTRE * YEAR Crosstabulation

			YEAR			Total
			Y2013	Y2016	Y2019	
Q2A. PRIMARY COMPARISON SHOPPING CENTRE	NO COMPARISON PRIMARY	Count	10	18	8	36
		% within YEAR	5.0%	9.0%	4.0%	6.0%
	WAL MART GP	Count	26	32	23	81
		% within YEAR	13.0%	16.0%	11.5%	13.5%
	RCSS GP	Count	3	2	3	8
		% within YEAR	1.5%	1.0%	1.5%	1.3%
	COSTCO GP	Count	21	17	11	49
		% within YEAR	10.5%	8.5%	5.5%	8.2%
	CDN TIRE GP	Count	4	0	2	6
		% within YEAR	2.0%	0.0%	1.0%	1.0%
	DOWNTOWN GP	Count	3	0	8	11
		% within YEAR	1.5%	0.0%	4.0%	1.8%
	PRAIRIE MALL	Count	89	77	88	254
		% within YEAR	44.5%	38.5%	44.0%	42.3%
	GATEWAY	Count	2	1	3	6
		% within YEAR	1.0%	0.5%	1.5%	1.0%
	TOWNE CENTRE MALL	Count	0	0	2	2
		% within YEAR	0.0%	0.0%	1.0%	0.3%
	WESTGATE	Count	9	26	20	55
		% within YEAR	4.5%	13.0%	10.0%	9.2%
	OTHER SC	Count	33	18	32	83
		% within YEAR	16.5%	9.0%	16.0%	13.8%
	ONLINE	Count	0	9	0	9
		% within YEAR	0.0%	4.5%	0.0%	1.5%
Total		Count	200	200	200	600
		% within YEAR	100.0%	100.0%	100.0%	100.0%

Report

Q2B. $ EXPENDITURE AT PRIMARY COMPARISON SC

YEAR	N	Minimum	Maximum	Mean	Std. Deviation	Sum
Y2013	200	25	2000	267.28	244.141	53455
Y2016	198	20	2500	243.03	261.081	48120
Y2019	200	5	2000	207.95	216.124	41590
Total	598	5	2500	239.41	241.924	143165

$Q2C*YEAR Crosstabulation

			YEAR			
			Y2013	Y2016	Y2019	Total
Q2C. MAIN REASONS SHOP PRIMARY COMPARISON SC - Multiple Response[a]	NO SPECIFIC REASON	Count	0	0	2	2
		% within YEAR	0.0%	0.0%	0.6%	
	CLOSE TO HOME	Count	27	7	105	139
		% within YEAR	6.6%	1.5%	32.9%	
	CLOSE WORK SCHOOL	Count	5	9	22	36
		% within YEAR	1.2%	2.0%	6.9%	
	PRICES	Count	65	63	13	141
		% within YEAR	15.8%	13.9%	4.1%	
	ONE STOP SHOP	Count	51	55	7	113
		% within YEAR	12.4%	12.1%	2.2%	
	NOT CROWDED	Count	4	2	0	6
		% within YEAR	1.0%	0.4%	0.0%	
	FAMILIARITY	Count	16	7	1	24
		% within YEAR	3.9%	1.5%	0.3%	
	PARKING	Count	6	0	2	8
		% within YEAR	1.5%	0.0%	0.6%	
	CUSTOMER SERVICE	Count	5	8	0	13
		% within YEAR	1.2%	1.8%	0.0%	
	SALES PROMOS	Count	13	28	12	53
		% within YEAR	3.2%	6.2%	3.8%	
	BUY IN BULK	Count	4	1	5	10
		% within YEAR	1.0%	0.2%	1.6%	
	SUPPORT LOCAL	Count	4	2	5	11
		% within YEAR	1.0%	0.4%	1.6%	
	SELECTION PRODUCTS	Count	30	51	17	98
		% within YEAR	7.3%	11.3%	5.3%	
	SELECTION STORES	Count	78	84	0	162
		% within YEAR	18.9%	18.5%	0.0%	
	SHOP SPECIFIC STORE	Count	18	35	2	55
		% within YEAR	4.4%	7.7%	0.6%	
	SPECIFIC ITEM BRAND	Count	7	38	6	51
		% within YEAR	1.7%	8.4%	1.9%	
	DAY OUT WINDOW SHOP	Count	10	5	1	16
		% within YEAR	2.4%	1.1%	0.3%	
	IN THE AREA	Count	1	3	0	4
		% within YEAR	0.2%	0.7%	0.0%	
	QUALITY PRODUCTS	Count	13	5	19	37
		% within YEAR	3.2%	1.1%	6.0%	
	COMPARISON ITEMS	Count	3	0	2	5
		% within YEAR	0.7%	0.0%	0.6%	
	CLOTHING	Count	13	22	7	42
		% within YEAR	3.2%	4.9%	2.2%	
	SHOES	Count	2	0	10	12
		% within YEAR	0.5%	0.0%	3.1%	
	MEETS NEEDS	Count	19	18	7	44
		% within YEAR	4.6%	4.0%	2.2%	
	GIFTS	Count	4	0	2	6
		% within YEAR	1.0%	0.0%	0.6%	
	PROXIMITY OTHER AREAS	Count	0	1	2	3
		% within YEAR	0.0%	0.2%	0.6%	
	QUALITY STORES	Count	4	0	2	6
		% within YEAR	1.0%	0.0%	0.6%	
	DEPARTMENT STORES	Count	3	0	2	5
		% within YEAR	0.7%	0.0%	0.6%	
	EASY ACCESS	Count	3	8	42	53
		% within YEAR	0.7%	1.8%	13.2%	
	HOURS OF OPERATION	Count	3	0	0	3
		% within YEAR	0.7%	0.0%	0.0%	
	NO TAXES	Count	1	0	12	13
		% within YEAR	0.2%	0.0%	3.8%	
	STORES CLUSTERED	Count	0	1	12	13
		% within YEAR	0.0%	0.2%	3.8%	
Total		Count	412	453	319	1184

Report

		YEAR			
		Y2013	Y2016	Y2019	Total
Q3A. % SPEND GROCERY DRUGSTORE GRANDE PRAIRIE PAST 3 MONTHS	N	200	200	200	600
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	68.95	71.72	90.94	77.20
	Std. Deviation	37.459	38.021	24.337	35.199
	Sum	13790	14344	18187	46321
Q3B. % SPEND GROCERY DRUGSTORE OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	N	200	200	200	600
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	23.55	11.75	8.12	14.47
	Std. Deviation	32.572	24.916	23.440	28.013
	Sum	4710	2349	1623	8682
Q3C. % SPEND GROCERY DRUGSTORE ONLINE PAST 3 MONTHS	N		45	8	53
	Minimum		1	5	1
	Maximum		100	25	100
	Mean		40.16	11.25	35.79
	Std. Deviation		32.409	6.409	31.677
	Sum		1807	90	1897
Q3D. IMPORTANCE RATING ADD GROCERY DRUGSTORE TO GRANDE PRAIRIE	N	200	200	200	600
	Minimum	1	1	0	0
	Maximum	10	10	10	10
	Mean	6.77	8.15	3.71	6.21
	Std. Deviation	2.999	2.368	3.052	3.376
	Sum	1353	1630	741	3724
Q4A. % SPEND PHARMACY HEALTHCARE ITEMS GRANDE PRAIRIE PAST 3 MONTHS	N	200	200	200	600
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	47.95	45.40	82.95	58.77
	Std. Deviation	47.841	47.662	35.857	47.289
	Sum	9590	9079	16590	35259
Q4B. % SPEND PHARMACY HEALTHCARE ITEMS OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	N	200	200	200	600
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	14.05	5.08	12.40	10.51
	Std. Deviation	31.529	20.609	31.583	28.600
	Sum	2810	1015	2480	6305
Q4C. % SPEND PHARMACY HEALTHCARE ITEMS ONLINE PAST 3 MONTHS	N		34	8	42
	Minimum		1	5	1
	Maximum		100	100	100
	Mean		61.94	53.75	60.38
	Std. Deviation		38.150	40.774	38.286
	Sum		2106	430	2536
Q4D. IMPORTANCE RATING ADD PHARMACY HEALTHCARE ITEMS TO GRANDE PRAIRIE	N	200	200	200	600
	Minimum	1	1	0	0
	Maximum	10	10	10	10
	Mean	4.96	6.06	3.16	4.73
	Std. Deviation	3.209	2.431	2.942	3.113
	Sum	992	1211	632	2835
Q5A. % USE PERSONAL SERVICES GRANDE PRAIRIE PAST 3 MONTHS	N	200	200	200	600
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	38.70	32.35	74.08	48.38
	Std. Deviation	47.469	46.560	42.857	49.158
	Sum	7740	6470	14815	29025
Q5B. % USE PERSONAL SERVICES OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	N	200	200	200	600
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	11.80	1.00	8.95	7.25
	Std. Deviation	30.250	9.975	27.260	24.594
	Sum	2360	200	1790	4350

Q5C. % USE PERSONAL SERVICES ONLINE PAST 3 MONTHS	N		11	4	15
	Minimum		10	20	10
	Maximum		100	100	100
	Mean		75.45	73.75	75.00
	Std. Deviation		37.514	37.722	36.204
	Sum		830	295	1125
Q5D. IMPORTANCE RATING ADD PERSONAL SERVICES TO GRANDE PRAIRIE	N	200	200	200	600
	Minimum	1	1	0	0
	Maximum	10	10	10	10
	Mean	4.10	5.41	2.70	4.07
	Std. Deviation	2.877	2.106	2.749	2.821
	Sum	819	1081	540	2440
Q6A. % SPEND ALCOHOL & TOBACCO GRANDE PRAIRIE PAST 3 MONTHS	N	200	200	200	600
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	37.95	38.10	59.21	45.09
	Std. Deviation	47.124	48.385	48.430	48.935
	Sum	7590	7620	11841	27051
Q6B. % SPEND ALCOHOL & TOBACCO OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	N	200	200	200	600
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	5.05	3.40	7.30	5.25
	Std. Deviation	18.328	17.348	24.449	20.316
	Sum	1010	680	1459	3149
Q6C. % SPEND ALCOHOL & TOBACCO ONLINE PAST 3 MONTHS	N		4		4
	Minimum		100		100
	Maximum		100		100
	Mean		100.00		100.00
	Std. Deviation		0.000		0.000
	Sum		400		400
Q6D. IMPORTANCE RATING ADD ALCOHOL & TOBACCO TO GRANDE PRAIRIE	N	200	200	200	600
	Minimum	1	1	0	0
	Maximum	10	10	10	10
	Mean	4.48	5.83	1.24	3.85
	Std. Deviation	3.077	2.278	1.537	3.062
	Sum	896	1166	247	2309
Q7A. % SPEND CLOTHES FOOTWEAR GRANDE PRAIRIE PAST 3 MONTHS	N	200	200	200	600
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	54.93	54.05	76.84	61.94
	Std. Deviation	47.178	46.016	33.598	43.923
	Sum	10985	10810	15367	37162
Q7B. % SPEND CLOTHES FOOTWEAR OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	N	200	200	200	600
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	10.08	7.78	9.43	9.09
	Std. Deviation	25.458	23.980	23.631	24.348
	Sum	2015	1555	1886	5456
Q7C. % SPEND CLOTHES FOOTWEAR ONLINE PRAIRIE PAST 3 MONTHS	N		26	48	74
	Minimum		5	1	1
	Maximum		100	100	100
	Mean		47.50	46.81	47.05
	Std. Deviation		25.622	27.796	26.877
	Sum		1235	2247	3482
Q7D. IMPORTANCE RATING ADD CLOTHING FOOTWEAR TO GRANDE PRAIRIE	N	200	200	200	600
	Minimum	1	1	0	0
	Maximum	10	10	10	10
	Mean	5.91	6.74	5.99	6.21
	Std. Deviation	3.102	2.606	3.394	3.069
	Sum	1181	1347	1198	3726
Q8A. % SPEND JEWELLERY & ACCESSORIES GRANDE PRAIRIE PAST 3 MONTHS	N	200	200	200	600
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	42.46	41.28	45.68	43.14
	Std. Deviation	47.017	48.622	48.341	47.954
	Sum	8492	8255	9135	25882

Q8B. % SPEND JEWELLERY & ACCESSORIES OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	N	200	200	200	600
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	11.54	4.50	3.80	6.61
	Std. Deviation	27.949	19.842	17.773	22.528
	Sum	2308	900	760	3968
Q8C. % SPEND JEWELLERY & ACCESSORIES ONLINE PAST 3 MONTHS	N		14	14	28
	Minimum		5	20	5
	Maximum		100	100	100
	Mean		67.50	64.64	66.07
	Std. Deviation		37.506	29.119	32.980
	Sum		945	905	1850
Q8D. IMPORTANCE RATING ADD JEWELLERY & ACCESSORIES TO GRANDE PRAIRIE	N	200	200	199	599
	Minimum	1	1	0	0
	Maximum	10	10	10	10
	Mean	4.51	5.58	2.09	4.06
	Std. Deviation	3.036	2.089	2.350	2.913
	Sum	901	1116	415	2432
Q9A. % SPEND HEALTH & BEAUTY SUPPLIES GRANDE PRAIRIE PAST 3 MONTHS	N	200	200	200	600
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	86.63	89.30	76.19	84.04
	Std. Deviation	30.597	25.355	37.969	32.180
	Sum	17325	17859	15238	50422
Q9B. % SPEND HEALTH & BEAUTY SUPPLIES OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	N	200	200	200	600
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	11.88	7.53	7.01	8.81
	Std. Deviation	28.696	20.937	23.547	24.661
	Sum	2375	1506	1402	5283
Q9C. % SPEND HEALTH & BEAUTY SUPPLIES ONLINE PAST 3 MONTHS	N		11	28	39
	Minimum		5	10	5
	Maximum		100	100	100
	Mean		21.36	48.57	40.90
	Std. Deviation		26.934	22.806	26.726
	Sum		235	1360	1595
Q9D. IMPORTANCE RATING ADD HEALTH & BEAUTY SUPPLIES TO GRANDE PRAIRIE	N	200	200	200	600
	Minimum	1	1	0	0
	Maximum	10	10	10	10
	Mean	4.05	5.19	2.87	4.04
	Std. Deviation	3.181	1.614	2.715	2.751
	Sum	810	1037	574	2421
Q10A. % SPEND FURNISHINGS APPLIANCES GRANDE PRAIRIE PAST 3 MONTHS	N	200	200	200	600
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	40.05	32.50	56.60	43.05
	Std. Deviation	48.105	46.420	47.766	48.416
	Sum	8010	6500	11320	25830
Q10B. % SPEND FURNISHINGS APPLIANCES OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	N	199	200	200	599
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	4.47	1.15	5.73	3.78
	Std. Deviation	18.163	9.212	21.701	17.261
	Sum	890	230	1145	2265
Q10C. % SPEND FURNISHINGS APPLIANCES ONLINE PAST 3 MONTHS	N		2	13	15
	Minimum		20	25	20
	Maximum		50	100	100
	Mean		35.00	64.23	60.33
	Std. Deviation		21.213	23.879	25.033
	Sum		70	835	905
Q10D. IMPORTANCE RATING ADD FURNISHINGS APPLIANCES TO GRANDE PRAIRIE	N	200	200	200	600
	Minimum	1	1	0	0
	Maximum	10	10	10	10
	Mean	4.06	4.95	3.01	4.01
	Std. Deviation	3.063	1.481	3.037	2.745
	Sum	812	989	602	2403

Q11A. % SPEND ELECTRONICS COMPUTERS GRANDE PRAIRIE PAST 3 MONTHS	N	200	200	200	600
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	46.68	46.78	61.88	51.78
	Std. Deviation	49.318	49.291	45.011	48.367
	Sum	9335	9355	12375	31065
Q11B. % SPEND ELECTRONICS COMPUTERS OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	N	200	200	200	600
	Minimum	0	0	0	0
	Maximum	100	90	100	100
	Mean	6.33	2.13	3.55	4.00
	Std. Deviation	22.940	12.395	16.500	17.871
	Sum	1265	425	710	2400
Q11C. % SPEND ELECTRONICS COMPUTERS ONLINE PAST 3 MONTHS	N		3	34	37
	Minimum		20	10	10
	Maximum		50	100	100
	Mean		40.00	62.21	60.41
	Std. Deviation		17.321	27.858	27.673
	Sum		120	2115	2235
Q11D. IMPORTANCE RATING ADD ELECTRONICS COMPUTERS TO GRANDE PRAIRIE	N	200	200	200	600
	Minimum	1	1	0	0
	Maximum	10	10	10	10
	Mean	3.72	5.38	2.81	3.97
	Std. Deviation	2.820	1.955	2.849	2.782
	Sum	744	1075	562	2381
Q12A. % SPEND HOME IMPROVEMENT GARDEN GRANDE PRAIRIE PAST 3 MONTHS	N	200	200	200	600
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	50.48	51.65	62.70	54.94
	Std. Deviation	49.397	49.516	46.381	48.685
	Sum	10095	10330	12540	32965
Q12B. % SPEND HOME IMPROVEMENT GARDEN OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	N	199	200	200	599
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	5.05	4.80	4.70	4.85
	Std. Deviation	20.232	20.143	18.223	19.521
	Sum	1005	960	940	2905
Q12C. % SPEND HOME IMPROVEMENT GARDEN ONLINE PAST 3 MONTHS	N		2	8	10
	Minimum		10	10	10
	Maximum		100	75	100
	Mean		55.00	40.00	43.00
	Std. Deviation		63.640	20.874	28.790
	Sum		110	320	430
Q12D. IMPORTANCE RATING ADD HOME IMPROVEMENT GARDEN TO GRANDE PRAIRIE	N	200	200	199	599
	Minimum	1	1	0	0
	Maximum	10	10	10	10
	Mean	3.45	5.15	2.49	3.70
	Std. Deviation	2.776	1.577	2.780	2.675
	Sum	690	1029	496	2215
Q13A. % SPEND BOOKS MUSIC GRANDE PRAIRIE PAST 3 MONTHS	N	200	200	200	600
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	52.65	54.00	43.33	49.99
	Std. Deviation	48.738	49.459	45.405	48.055
	Sum	10530	10800	8665	29995
Q13B. % SPEND BOOK MUSIC OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	N	199	200	200	599
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	12.91	8.00	3.58	8.16
	Std. Deviation	31.616	26.257	16.176	25.730
	Sum	2570	1600	715	4885
Q13C. % SPEND BOOK MUSIC ONLINE PAST 3 MONTHS	N		1	89	90
	Minimum		100	10	10
	Maximum		100	100	100
	Mean		100.00	80.00	80.22
	Std. Deviation			26.852	26.784
	Sum		100	7120	7220

Q13D. IMPORTANCE RATING ADD BOOKS MUSIC TO GRANDE PRAIRIE	N	200	200	200	600
	Minimum	1	1	0	0
	Maximum	10	10	10	10
	Mean	4.39	5.00	3.57	4.32
	Std. Deviation	3.277	1.504	3.298	2.877
	Sum	878	1000	714	2592
Q14A. % SPEND SPORTING GOODS TOYS HOBBIES GRANDE PRAIRIE PAST 3 MONTHS	N	200	200	200	600
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	66.50	62.03	66.65	65.06
	Std. Deviation	45.883	47.943	42.290	45.407
	Sum	13300	12405	13330	39035
Q14B. % SPEND SPORTING GOODS TOYS HOBBIES OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	N	199	200	200	599
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	14.07	7.23	6.80	9.36
	Std. Deviation	32.876	24.850	21.976	27.114
	Sum	2800	1445	1360	5605
Q14C. % SPEND SPORTING GOODS TOYS HOBBIES ONLINE PAST 3 MONTHS	N		2	35	37
	Minimum		50	15	15
	Maximum		100	100	100
	Mean		75.00	51.71	52.97
	Std. Deviation		35.355	28.309	28.637
	Sum		150	1810	1960
Q14D. IMPORTANCE RATING ADD SPORTING GOODS TOYS HOBBIES TO GRANDE PRAIRIE	N	200	200	200	600
	Minimum	1	1	0	0
	Maximum	10	10	10	10
	Mean	4.16	5.32	4.08	4.52
	Std. Deviation	2.968	1.741	3.459	2.869
	Sum	832	1064	816	2712
Q15A. % SPEND SPECIALTY RETAIL GRANDE PRAIRIE PAST 3 MONTHS	N	200	200	200	600
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	73.25	83.93	40.23	65.80
	Std. Deviation	41.652	33.336	46.336	44.782
	Sum	14650	16785	8045	39480
Q15B. % SPEND SPECIALTY RETAIL OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	N	199	200	200	599
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	13.82	13.95	6.93	11.56
	Std. Deviation	31.006	31.764	23.833	29.221
	Sum	2750	2790	1385	6925
Q15C. % SPEND SPECIALTY RETAIL ONLINE PAST 3 MONTHS	N		4	26	30
	Minimum		50	10	10
	Maximum		75	100	100
	Mean		56.25	64.23	63.17
	Std. Deviation		12.500	29.654	27.962
	Sum		225	1670	1895
Q15D. IMPORTANCE RATING ADD SPECIALTY RETAIL TO GRANDE PRAIRIE	N	200	200	200	600
	Minimum	1	1	0	0
	Maximum	10	10	10	10
	Mean	6.38	5.99	3.42	5.26
	Std. Deviation	3.171	2.344	3.482	3.305
	Sum	1276	1197	683	3156
Q16A. % GO TO COFFEE CAFE FAST FOOD GRANDE PRAIRIE PAST 3 MONTHS	N	200	200	200	600
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	32.25	51.65	85.18	56.36
	Std. Deviation	46.629	49.710	31.596	48.515
	Sum	6450	10330	17035	33815
Q16B. % GO TO COFFEE CAFE FAST FOOD OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	N	199	200	200	599
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	5.28	6.35	10.33	7.32
	Std. Deviation	21.923	23.643	25.687	23.863
	Sum	1050	1270	2065	4385

Q16D. IMPORTANCE RATING ADD COFFEE CAFE FAST FOOD TO GRANDE PRAIRIE	N	200	200	200	600
	Minimum	1	1	0	0
	Maximum	10	10	10	10
	Mean	3.60	5.17	2.97	3.91
	Std. Deviation	2.811	1.584	3.000	2.703
	Sum	720	1033	593	2346
Q17A. % EAT OUT FULL SERVICE RESTAURANTS GRANDE PRAIRIE PAST 3 MONTHS	N	200	200	200	600
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	81.65	87.48	81.45	83.53
	Std. Deviation	30.993	26.458	34.509	30.905
	Sum	16330	17495	16290	50115
Q17B. % EAT OUT FULL SERVICE RESTAURANTS OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	N	198	200	200	598
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	13.48	9.53	11.55	11.51
	Std. Deviation	24.936	21.563	26.440	24.409
	Sum	2670	1905	2310	6885
Q17D. IMPORTANCE RATING ADD FULL SERVICE RESTAURANTS TO GRANDE PRAIRIE	N	200	200	200	600
	Minimum	1	1	0	0
	Maximum	10	10	10	10
	Mean	4.41	5.38	5.11	4.97
	Std. Deviation	3.105	1.732	3.488	2.900
	Sum	882	1076	1021	2979
Q18A. % USE FITNESS DAY SPA GRANDE PRAIRIE PAST 3 MONTHS	N	200	200	200	600
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	77.25	80.82	57.93	72.00
	Std. Deviation	32.372	34.335	49.147	40.541
	Sum	15450	16164	11585	43199
Q18B. % USE FITNESS DAY SPA OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	N	199	200	200	599
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	18.34	12.18	3.08	11.19
	Std. Deviation	27.988	26.382	16.294	24.874
	Sum	3650	2436	615	6701
Q18D. IMPORTANCE RATING ADD FITNESS DAY SPA TO GRANDE PRAIRIE	N	200	200	198	598
	Minimum	1	1	0	0
	Maximum	10	10	10	10
	Mean	6.43	8.30	1.80	5.52
	Std. Deviation	2.892	2.458	2.152	3.713
	Sum	1285	1660	356	3301
Q19A. % USE ENTERTAINMENT GRANDE PRAIRIE PAST 3 MONTHS	N	200	200	200	600
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	62.45	74.93	67.80	68.39
	Std. Deviation	44.864	41.342	45.354	44.114
	Sum	12490	14985	13560	41035
Q19B. % USE ENTERTAINMENT OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	N	199	200	200	599
	Minimum	0	0	0	0
	Maximum	100	100	100	100
	Mean	10.10	6.08	5.70	7.29
	Std. Deviation	23.810	19.861	20.692	21.573
	Sum	2010	1215	1140	4365
Q19C. % USE ENTERTAINMENT ONLINE PAST 3 MONTHS	N		1	2	3
	Minimum		100	50	50
	Maximum		100	50	100
	Mean		100.00	50.00	66.67
	Std. Deviation			0.000	28.868
	Sum		100	100	200
Q19D. IMPORTANCE RATING ADD ENTERTAINMENT TO GRANDE PRAIRIE	N	200	200	200	600
	Minimum	1	1	0	0
	Maximum	10	10	10	10
	Mean	5.74	7.11	4.65	5.83
	Std. Deviation	3.219	2.763	3.930	3.482
	Sum	1148	1422	930	3500

Q20A. % SPEND AUTOMOTIVE VEHICLES GRANDE PRAIRIE PAST 3 MONTHS	N			200	200
	Minimum			0	0
	Maximum			100	100
	Mean			39.05	39.05
	Std. Deviation			47.823	47.823
	Sum			7810	7810
Q20B. % SPEND AUTOMOTIVE VEHICLES OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	N			200	200
	Minimum			0	0
	Maximum			100	100
	Mean			17.70	17.70
	Std. Deviation			37.035	37.035
	Sum			3540	3540
Q20C. % SPEND AUTOMOTIVE VEHICLES ONLINE PAST 3 MONTHS	N			1	1
	Minimum			50	50
	Maximum			50	50
	Mean			50.00	50.00
	Std. Deviation				
	Sum			50	50
Q20D. IMPORTANCE RATING ADD AUTOMOTIVE VEHICLES TO GRANDE PRAIRIE	N			200	200
	Minimum			0	0
	Maximum			10	10
	Mean			1.65	1.65
	Std. Deviation			2.418	2.418
	Sum			329	329
Q21A. % SPEND AUTOMOTIVE PARTS GRANDE PRAIRIE PAST 3 MONTHS	N			200	200
	Minimum			0	0
	Maximum			100	100
	Mean			60.60	60.60
	Std. Deviation			46.750	46.750
	Sum			12120	12120
Q21B. % SPEND AUTOMOTIVE PARTS OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	N			200	200
	Minimum			0	0
	Maximum			100	100
	Mean			12.45	12.45
	Std. Deviation			30.826	30.826
	Sum			2490	2490
Q21C. % SPEND AUTOMOTIVE PARTS ONLINE PAST 3 MONTHS	N			11	11
	Minimum			10	10
	Maximum			100	100
	Mean			62.73	62.73
	Std. Deviation			31.966	31.966
	Sum			690	690
Q21D. IMPORTANCE RATING ADD AUTOMOTIVE PARTS TO GRANDE PRAIRIE	N			200	200
	Minimum			0	0
	Maximum			10	10
	Mean			2.39	2.39
	Std. Deviation			2.760	2.760
	Sum			478	478

$Q22*YEAR Crosstabulation

			YEAR			
			Y2013	Y2016	Y2019	Total
Q22. LIKE MOST ABOUT SHOPPING OPPORTUNITIES IN GRANDE PRAIRIE - Multiple Response[a]	NOTHING SPECIFIC	Count	5	9	22	36
		% within YEAR	1.1%	2.1%	6.3%	
	CLOSE TO HOME	Count	43	15	91	149
		% within YEAR	9.8%	3.4%	26.2%	
	CLOSE TO WORK SCHOOL	Count	1	0	21	22
		% within YEAR	0.2%	0.0%	6.1%	
	PRICE SALES PROMO	Count	42	24	12	78
		% within YEAR	9.6%	5.5%	3.5%	
	ONE STOP SHOP	Count	7	2	15	24
		% within YEAR	1.6%	0.5%	4.3%	
	NOT CROWDED	Count	7	6	2	15
		% within YEAR	1.6%	1.4%	0.6%	
	MEET BASIC NEEDS	Count	48	55	10	113
		% within YEAR	11.0%	12.6%	2.9%	
	PARKING TRAFFIC	Count	7	2	14	23
		% within YEAR	1.6%	0.5%	4.0%	
	CUSTOMER SERVICE OVERALL	Count	13	28	20	61
		% within YEAR	3.0%	6.4%	5.8%	
	EASY ACCESS	Count	22	35	16	73
		% within YEAR	5.0%	8.0%	4.6%	
	SELECTION STORE	Count	73	62	64	199
		% within YEAR	16.7%	14.2%	18.4%	
	SELECTION RESTAURANTS	Count	1	8	0	9
		% within YEAR	0.2%	1.8%	0.0%	
	LIKE SPECIFIC STORE	Count	32	11	6	49
		% within YEAR	7.3%	2.5%	1.7%	
	PROFESSIONAL PERSONAL SERVICES	Count	0	2	0	2
		% within YEAR	0.0%	0.5%	0.0%	
	SELECTION PRODUCTS	Count	0	0	15	15
		% within YEAR	0.0%	0.0%	4.3%	
	IN STOCK	Count	3	0	1	4
		% within YEAR	0.7%	0.0%	0.3%	
	PROXIMITY OTHER STORES	Count	39	47	10	96
		% within YEAR	8.9%	10.7%	2.9%	
	SUPPORT LOCAL	Count	1	0	7	8
		% within YEAR	0.2%	0.0%	2.0%	
	FAMILIARITY	Count	15	13	4	32
		% within YEAR	3.4%	3.0%	1.2%	
	LIKE NEW STORES	Count	9	2	8	19
		% within YEAR	2.1%	0.5%	2.3%	
	HOURS OF OPERATION	Count	1	0	0	1
		% within YEAR	0.2%	0.0%	0.0%	
	COMMUNITY ORIENTED	Count	58	64	4	126
		% within YEAR	13.3%	14.6%	1.2%	
	VARIETY FAST FOOD	Count	1	1	5	7
		% within YEAR	0.2%	0.2%	1.4%	
	ENTERTAINMENT	Count	1	7	0	8
		% within YEAR	0.2%	1.6%	0.0%	
	NO TAX	Count	8	3	0	11
		% within YEAR	1.8%	0.7%	0.0%	
	NOT GO OUTSIDE GP	Count	0	22	0	22
		% within YEAR	0.0%	5.0%	0.0%	
	LIKE DT STORES	Count	0	15	0	15
		% within YEAR	0.0%	3.4%	0.0%	
	TRANSIT	Count	0	5	0	5
		% within YEAR	0.0%	1.1%	0.0%	
Total		Count	437	438	347	1222

Percentages and totals are based on responses.

a. Group

$Q23*YEAR Crosstabulation

			YEAR			
			Y2013	Y2016	Y2019	Total
Q23. DISLIKE MOST ABOUT SHOPPING OPPORTUNITIES IN GRANDE PRAIRIE - Multiple Response[a]	NOTHING SPECIFIC	Count	30	44	58	132
		% within YEAR	8.7%	14.7%	23.4%	
	NOT CLOSE TO HOME	Count	0	0	3	3
		% within YEAR	0.0%	0.0%	1.2%	
	NOT CLOSE TO WORK SCHOOL	Count	0	0	3	3
		% within YEAR	0.0%	0.0%	1.2%	
	PRICES SALES	Count	21	29	17	67
		% within YEAR	6.1%	9.7%	6.9%	
	CROWDED	Count	26	10	3	39
		% within YEAR	7.6%	3.3%	1.2%	
	DOES NOT MEET NEEDS	Count	0	0	8	8
		% within YEAR	0.0%	0.0%	3.2%	
	PARKING TRAFFIC	Count	47	39	52	138
		% within YEAR	13.7%	13.0%	21.0%	
	CUSTOMER SERVICE	Count	35	21	12	68
		% within YEAR	10.2%	7.0%	4.8%	
	ACCESS	Count	5	2	9	16
		% within YEAR	1.5%	0.7%	3.6%	
	SELECTION STORES	Count	75	10	42	127
		% within YEAR	21.9%	3.3%	16.9%	
	SELECTION RESTAURANTS	Count	21	2	0	23
		% within YEAR	6.1%	0.7%	0.0%	
	MISSING SPECIFIC STORE	Count	17	63	4	84
		% within YEAR	5.0%	21.1%	1.6%	
	PROFESSIONAL PERSONAL SERVICES	Count	12	3	0	15
		% within YEAR	3.5%	1.0%	0.0%	
	SELECTION PRODUCTS	Count	4	0	22	26
		% within YEAR	1.2%	0.0%	8.9%	
	NOT IN STOCK	Count	6	4	5	15
		% within YEAR	1.7%	1.3%	2.0%	
	NOT PEDESTRIAN FRIENDLY	Count	10	3	3	16
		% within YEAR	2.9%	1.0%	1.2%	
	DEOS NOT SUPPORT LOCAL	Count	1	14	0	15
		% within YEAR	0.3%	4.7%	0.0%	
	FAMILIARITY	Count	1	0	0	1
		% within YEAR	0.3%	0.0%	0.0%	
	DISLIKE NEW STORE	Count	0	0	1	1
		% within YEAR	0.0%	0.0%	0.4%	
	HOURS OF OPERATION	Count	0	0	4	4
		% within YEAR	0.0%	0.0%	1.6%	
	NOT COMMUNITY ORIENTED	Count	0	1	1	2
		% within YEAR	0.0%	0.3%	0.4%	
	NO VARIETY FAST FOOD	Count	6	2	1	9
		% within YEAR	1.7%	0.7%	0.4%	
	ENTERTAINMENT	Count	25	9	0	34
		% within YEAR	7.3%	3.0%	0.0%	
	NEED BIGGER MALL	Count	1	2	0	3
		% within YEAR	0.3%	0.7%	0.0%	
	LACK OVERALL COMPETITION	Count	0	25	0	25
		% within YEAR	0.0%	8.4%	0.0%	
	ROAD CONDITIONS	Count	0	5	0	5
		% within YEAR	0.0%	1.7%	0.0%	
	LACK STORES ACTIVITIES DT	Count	0	10	0	10
		% within YEAR	0.0%	3.3%	0.0%	
	TRANSIT	Count	0	1	0	1
		% within YEAR	0.0%	0.3%	0.0%	
Total		Count	343	299	248	890

Percentages and totals are based on responses.

a. Group

Report

D1. HOUSEHOLD SIZE

YEAR	N	Minimum	Mean	Maximum	Std. Deviation
Y2013	200	1	3.25	11	1.738
Y2016	200	1	3.26	10	1.517
Y2019	200	1	2.97	7	1.473
Total	600	1	3.16	11	1.583

Report

D2. # HOUSEHOLD < 18 YEARS OLD

YEAR	N	Minimum	Mean	Maximum	Std. Deviation
Y2013	200	0	0.80	9	1.264
Y2016	200	0	0.82	8	1.174
Y2019	200	0	0.87	5	1.153
Total	600	0	0.83	9	1.196

D3. RESPONDENT AGE * YEAR Crosstabulation

			YEAR			
			Y2013	Y2016	Y2019	Total
D3. RESPONDENT AGE	18-24	Count	49	42	31	122
		% within YEAR	24.5%	21.0%	15.5%	20.3%
	25-34	Count	50	64	54	168
		% within YEAR	25.0%	32.0%	27.0%	28.0%
	35-44	Count	40	42	44	126
		% within YEAR	20.0%	21.0%	22.0%	21.0%
	45-54	Count	31	17	27	75
		% within YEAR	15.5%	8.5%	13.5%	12.5%
	55-64	Count	14	21	28	63
		% within YEAR	7.0%	10.5%	14.0%	10.5%
	65-74	Count	10	11	9	30
		% within YEAR	5.0%	5.5%	4.5%	5.0%
	75+	Count	6	3	7	16
		% within YEAR	3.0%	1.5%	3.5%	2.7%
Total		Count	200	200	200	600
		% within YEAR	100.0%	100.0%	100.0%	100.0%

D4. HOUSEHOLD YEARLY INCOME * YEAR Crosstabulation

			YEAR			
			Y2013	Y2016	Y2019	Total
D4. HOUSEHOLD YEARLY INCOME	REFUSED DK	Count	14	45	18	77
		% within YEAR	7.0%	22.5%	9.0%	12.8%
	<$15,000	Count	5	0	6	11
		% within YEAR	2.5%	0.0%	3.0%	1.8%
	$15,000-$24,999	Count	12	11	7	30
		% within YEAR	6.0%	5.5%	3.5%	5.0%
	$25,000-$34,999	Count	10	14	8	32
		% within YEAR	5.0%	7.0%	4.0%	5.3%
	$35,000-$44,999	Count	7	16	5	28
		% within YEAR	3.5%	8.0%	2.5%	4.7%
	$45,000-$54,999	Count	13	8	14	35
		% within YEAR	6.5%	4.0%	7.0%	5.8%
	$55,000-$64,999	Count	19	11	8	38
		% within YEAR	9.5%	5.5%	4.0%	6.3%
	$65,000-$74,999	Count	20	16	16	52
		% within YEAR	10.0%	8.0%	8.0%	8.7%
	$75,000-$99,999	Count	18	17	30	65
		% within YEAR	9.0%	8.5%	15.0%	10.8%
	$100,000-$124,999	Count	29	20	38	87
		% within YEAR	14.5%	10.0%	19.0%	14.5%
	$125,000+	Count	53	42	50	145
		% within YEAR	26.5%	21.0%	25.0%	24.2%
Total		Count	200	200	200	600
		% within YEAR	100.0%	100.0%	100.0%	100.0%

D5. RESPONDENT GENDER * YEAR Crosstabulation

			YEAR			
			Y2013	Y2016	Y2019	Total
D5. RESPONDENT GENDER	MALE	Count	80	62	59	201
		% within YEAR	40.0%	31.0%	29.5%	33.5%
	FEMALE	Count	120	138	141	399
		% within YEAR	60.0%	69.0%	70.5%	66.5%
Total		Count	200	200	200	600
		% within YEAR	100.0%	100.0%	100.0%	100.0%

DAY OF INTERVIEW * YEAR Crosstabulation

			YEAR			
			Y2013	Y2016	Y2019	Total
DAY OF INTERVIEW	2013:TUES DEC 10 / 2016:TUES FEB 23 / 2019:TUES MAR 19	Count	20	40	41	101
		% within YEAR	10.0%	20.0%	20.5%	16.8%
	2013:WED DEC 11 / 2016:WED FEB 24 / 2019:WED MAR 20	Count	50	40	43	133
		% within YEAR	25.0%	20.0%	21.5%	22.2%
	2013:THURS DEC 12 / 2016:THURS FEB 25 / 2019:THURS MAR 21	Count	41	40	42	123
		% within YEAR	20.5%	20.0%	21.0%	20.5%
	2013:FRI DEC 13 / 2016:FRI FEB 26 / 2019:FRI MAR 22	Count	44	40	45	129
		% within YEAR	22.0%	20.0%	22.5%	21.5%
	2013:SAT DEC 14 / 2016:SAT FEB 27 / 2019:SAT MAR 23	Count	45	40	29	114
		% within YEAR	22.5%	20.0%	14.5%	19.0%
Total		Count	200	200	200	600
		% within YEAR	100.0%	100.0%	100.0%	100.0%

TIME OF INTERVIEW * YEAR Crosstabulation

			YEAR			
			Y2013	Y2016	Y2019	Total
TIME OF INTERVIEW	MORNING	Count	42	43	85	170
		% within YEAR	21.0%	21.5%	42.5%	28.3%
	AFTERNOON	Count	117	134	109	360
		% within YEAR	58.5%	67.0%	54.5%	60.0%
	EVENING	Count	41	23	6	70
		% within YEAR	20.5%	11.5%	3.0%	11.7%
Total		Count	200	200	200	600
		% within YEAR	100.0%	100.0%	100.0%	100.0%

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