

Retail & Office Market Analysis

# The City of Spruce Grove

December 2017



Photos Courtesy of City of Spruce Grove, 2017



# RETAIL & OFFICE

## Market Analysis

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City of Spruce Grove  
Alberta

**CUSHING**  
 **TERRELL**  
ARCHITECTURE INC.



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# PREFACE

Cushing Terrell Architecture Inc. (“Cushing Terrell”) was commissioned by the City of Spruce Grove in September 2017 to update the existing Retail & Office Market and Gap Analysis.

The study represents an update to a previous study prepared in 2015 and was carried out over the period September to November 2017.

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

Retail spending (i.e. Demand) and the City’s retail inventory and its corresponding productivity (i.e. Supply) was supported by a detailed Consumer Intercept Survey previously conducted in 2015 by Keyfax Market Research to further identify gaps in Spruce Grove’s provision of shops and services.

Additionally, a quantification of the City’s office inventory and composition was also conducted creating a foundation upon which future office demand could be estimated over the next 5 and 10 years.

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

Reference material for this report was obtained from, but not limited to; The City of Spruce Grove, Commercial Real Estate Brokerage Firms, Conference Board of Canada, Local Commercial Developers, Statistics Canada, Pitney Bowes/Tetrad Analytics, International Council of Shopping Centers and Cushing Terrell Architecture Inc.

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

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

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

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

*Cushing Terrell Architecture Inc. - December 2017*



# ii EXECUTIVE SUMMARY

## LOCATION CONTEXT SUMMARY

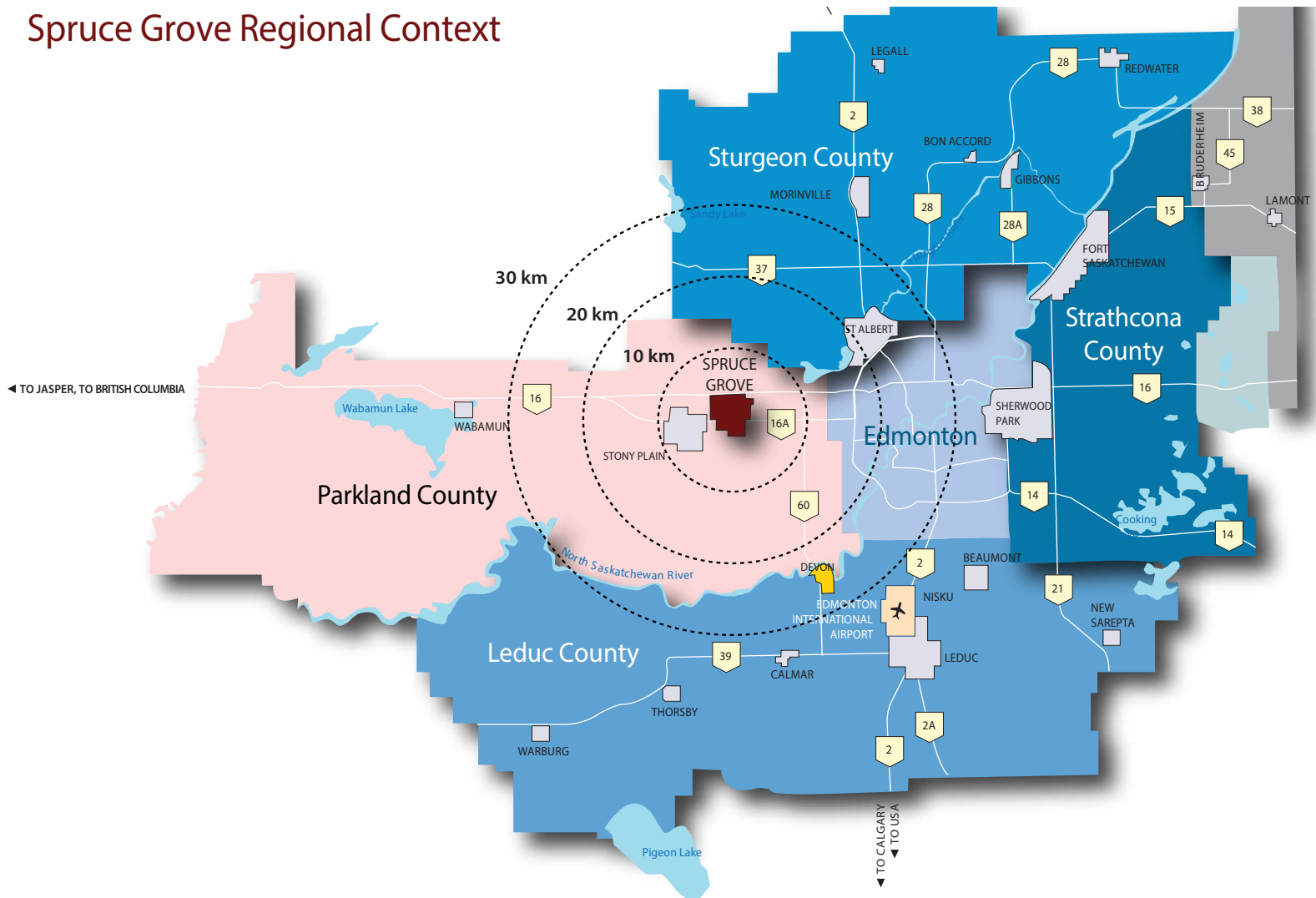
The City of Spruce continues to be a market supported by robust growth dynamics in terms of population growth, new residential development activity and commensurate retail opportunities.

The City's location as a regional hub for western communities including Stony Plain, those in Parkland County and beyond remains a key factor in the success of the City in garnering commercial opportunities.

The historic pattern of development permits and growth in traffic volumes along major arterials further validates Spruce Grove's evolution as a city whereby it is no longer viewed simply as a bedroom community to Edmonton, but rather a thriving, **"prosperous, self-sustaining regional economic home to competitive, successful commercial and industrial companies."**

Over the last 6-year period 2011 to 2017 (using the City's Municipal Census), the City of Spruce Grove grew from 26,171 to 34,881; an average annual growth rate of 4.9%.

## Spruce Grove Regional Context







# EXECUTIVE SUMMARY

As a comparison, the Town of Stony Plain's population per the 2016 Federal Census was 17,189 (an increase of 2,138 from 2011), while Parkland County's population per the 2016 Federal Census was 32,097 (an increase of 1,529 from 2011).

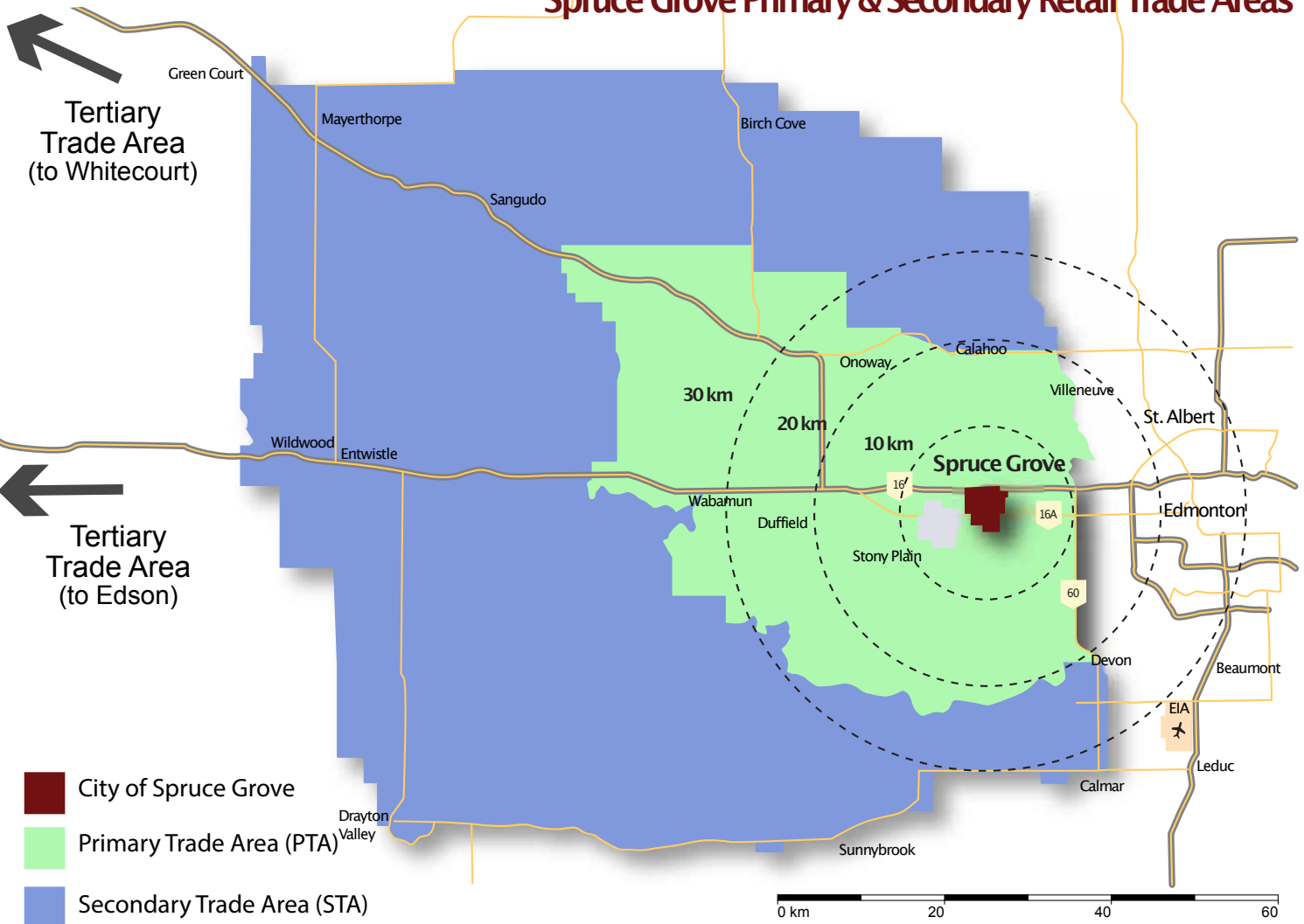
Over the period of 2009-2017 (year-to-date), the City of Spruce Grove has exhibited strength and resiliency as evidenced by an average of over 900 annual permits issued for all types of sectors.

## RETAIL TRADE AREA SUMMARY

Spruce Grove's Retail Trade Area reflects a strong pattern of regional market penetration wherein the majority of customers are likely to come from communities west of Spruce Grove. Even communities outside of the Primary & Secondary such as Whitecourt and Edson will use Spruce Grove as its regional hub for larger and bulk merchandise and services.

Spruce Grove's Trade Area is a true reflection of the strategic location of the City as an interceptor to consumers coming from the west.

## Spruce Grove Primary & Secondary Retail Trade Areas



# ii EXECUTIVE SUMMARY

The Retail Trade Area Demographic Profile illustrates a growing regional market of 138,000 residents in 2017 growing to 164,000 by 2027.

Spruce Grove's Retail Trade Area is characterized by a young, aspirational family-oriented demographic with a commensurate high average household income profile. The Retail Trade Area profile is highly mobile in their shopping patterns, yet they are increasingly seeking opportunities to spend their money closer to home for more frequent purchases.

Overall, Spruce Grove represents a \$1.9 Billion retail market in which categories such as Grocery, Automotive/RV and Restaurants, Clothing/Apparel & Footwear, Toys & Hobbies and Home Furnishings represent growing and significant spending segments.

## RETAIL SUPPLY SUMMARY

The resulting inventory for the City of Spruce Grove clearly illustrates a regional retail offering that provides the day-to-day as well as non-destination oriented, yet essential comparison merchandise.

The City of Spruce Grove's retail inventory continues to mature and evolve to point whereby concerns are less so with the overall amount of retail space, but rather more so with the actual mix of specific retail. Spruce Grove is a regional retail market which continues to grow in-step with population growth outwards from the City of Edmonton.

The City has an estimated retail inventory of almost 2.55 million sf and a vacancy of less than 3% (2.4%), which is more an indication of older obsolete retail spaces that are losing favour to the new retail nodes and projects, not just at Century Crossing, but elsewhere in the community such as at the Tri-Leisure Village and new Westwind Centre.

Over the past 5 year period retail vacancy in Spruce Grove has remained less than 5%. Moreover, in the past 3 years, retail vacancy declined from 4% in 2015 to 2.4% in 2017.

Categories like Home Furnishings, Fashion, Full Service Restaurants and Toys & Hobbies could be enhanced in response to the demographics.

Often, a growing market that starts to get new sought after tenants starts to exhibit further "wish lists" that indicate they can get bored quickly if other shopping opportunities aren't provided. This is the double-sided nature of attracting retail businesses. The case in point at the value ends of the price point spectrum would be the introduction of Winners and Value Village, each of which has been met with great success in Spruce Grove. In the near future though, expectations will be for Spruce Grove to have more retail at mid price points (e.g. Aldo, H&M, Marshall's, Bed Bath & Beyond, Buy Buy Baby, Mastermind Toys, Urban Barn, Bouclair etc). If not provided, then the propensity for outflow could resurface.

Future demand forecasts for new retail space over the next decade suggest that the City of Spruce Grove could grow by an additional 775,000 to 1 million sf. Pioneer Point, located immediately east of Century Crossing fronting Hwy 16A is one such development that will tap into this figure as could the future development as outlined in the West Central Area Structure Plan (northwest corner of Hwy 16A & Jennifer Heil Way).

This is a cumulative figure and thus any demand would need to occur in step and balance with demand from both the market, consumer and tenant perspectives.



# EXECUTIVE SUMMARY

## RETAIL DEMAND SUMMARY

The current patterns of retail spending and market share provide further validation that Spruce Grove has a wide regional trade area penetration.

The City is successful in retaining expenditure from its own residents at an overall market share of 56%. Convenience categories average over 90% retained sales from Spruce Grove residents.

Similarly, the City does well to garner inflow from its PTA, largely from Stony Plain and Parkland County residents at an overall market share of 56%, thus a marginal drop in market share.

Total demand across the Primary Trade Area (PTA) and Secondary Trade Area (STA) based on market share of resident spending suggests current demand for approximately 2.34 million sf.

Assuming continued growth and increased market penetration of trade area retail sales, there is an excellent opportunity for the City of Spruce Grove to continue its path of growth for retail.

Spruce Grove's regional catchment is evidenced by a net sales inflow of \$697 million from the PTA and STA combined. Spruce Grove garners an estimated net inflow of almost \$210.9 million in Convenience Merchandise retail sales from the PTA and STA combined of which \$156 million is in Grocery & Specialty Foods Sales.

Spruce Grove has a leakage/outflow of just under \$49.3 million in Home Furnishings and Home Electronics categories (\$29.0 million and \$20.2 million respectively) as well as Footwear (\$6.3 million), Books & Media (\$3.5 million) and Toys & Hobbies (\$350,000).

The City should strive to keep balance and seek to identify the optimal mix of categories and store types in the community. While it is not possible to stop retailers from opening in the community, it is incumbent to use a study such as this to work with developers and property owners to identify voids and opportunities in the market that should be pursued such as Toys & Hobbies, Home Furnishings etc.

As a goal, the City could aim for 5 percentage point increase in overall market share of expenditure for the entire trade area from 48% to 53% could result in additional demand for almost 425,000 sf by 2022.

## CONSUMER SURVEY SUMMARY (2015)

The Consumer Intercept Survey (conducted in Fall 2015) yielded findings that reinforce the more regional market/draw for the City of Spruce Grove. Although this Consumer Intercept Survey was conducted in 2015 and while some identified tenants have since entered the market, the overall findings remain relevant to the current day.

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

Even though consumers identified specific retailers in categories such as Home Furnishings and Home Electronics, their overall importance ratings as it relates to retaining more spending in Spruce Grove did not seem to resonate as much. Regardless, using the example of Winners would suggest that the introduction of some home furnishings and home electronics retailers could be viable for the market if in the right location.

# ii EXECUTIVE SUMMARY

Respondents identified a number of recognized restaurant and retailer brands. With the success of Century Crossing, Spruce Grove is well positioned to attract many of the identified restaurants, or at least make an effort at attracting them.

The City Centre is still recognized as a key node that can accommodate future tenant opportunities, particularly in the specialty retail, food & beverage categories and personal services categories.

However, the City Centre has an opportunity to respond and create a framework that brings consumers back to the City Centre for more than just the quick in and out essential needs, but for longer stay social interaction and community engagement.

As more traditional retail developments enter the market, the more residents will harken back to wanting the social and experiential side of shopping, dining and leisure. Ultimately, this is where the City Centre can fill a void and niche in the market.

## OFFICE MARKET SUPPLY SUMMARY

The compilation of office inventory reveals a total inventory of office space in the City of Spruce Grove in the range of 350,000 sf (including new buildings under construction at Westwind).

Not surprisingly the City Centre is the dominant location for office-related businesses, with an inventory of 157,200 sf or almost 45% of the City's office inventory.

The biggest weakness of the City's office inventory, with the exception of the Queen Street Professional Centre, is the age and quality of the office product in the City.

The majority of the office inventory is in older buildings and spaces and thus while potentially having lower lease rates will present a challenge in attracting potential new office tenants.

In response to the limited quality and amount of available traditional office space, the market is finding that users are taking up what would otherwise be streetfront retail uses.

As the City continues to grow, new locations for Office space should be considered in the City Centre as well as other areas, such as Westwind.

## OFFICE MARKET DEMAND SUMMARY

On an incremental annual basis, the demand averages approximately 20,000 sf. The historic trend in Spruce Grove has been an absorption of approximately 5,000 to 7,000 sf per year. Therefore, the estimates of future demand could be considered slightly aggressive, but as Spruce Grove continues to grow and its relationship with Acheson becomes more important, the drivers of office demand are expected to increase, albeit at modest levels.

The office demand forecasts suggest that by 2022 there would be enough demand in the City for approximately 90,000 sf of new office space which may not be all in one development, but could be allocated in two areas of the city, namely the City Centre and Westwind.

Further growth suggests a total demand for just over 200,000 sf of new office space by 2027.



# EXECUTIVE SUMMARY

## CONCLUSION

The Retail & Office Market Analysis for the City of Spruce Grove entailed an extensive process summarized in the following:

### KEY FINDINGS:

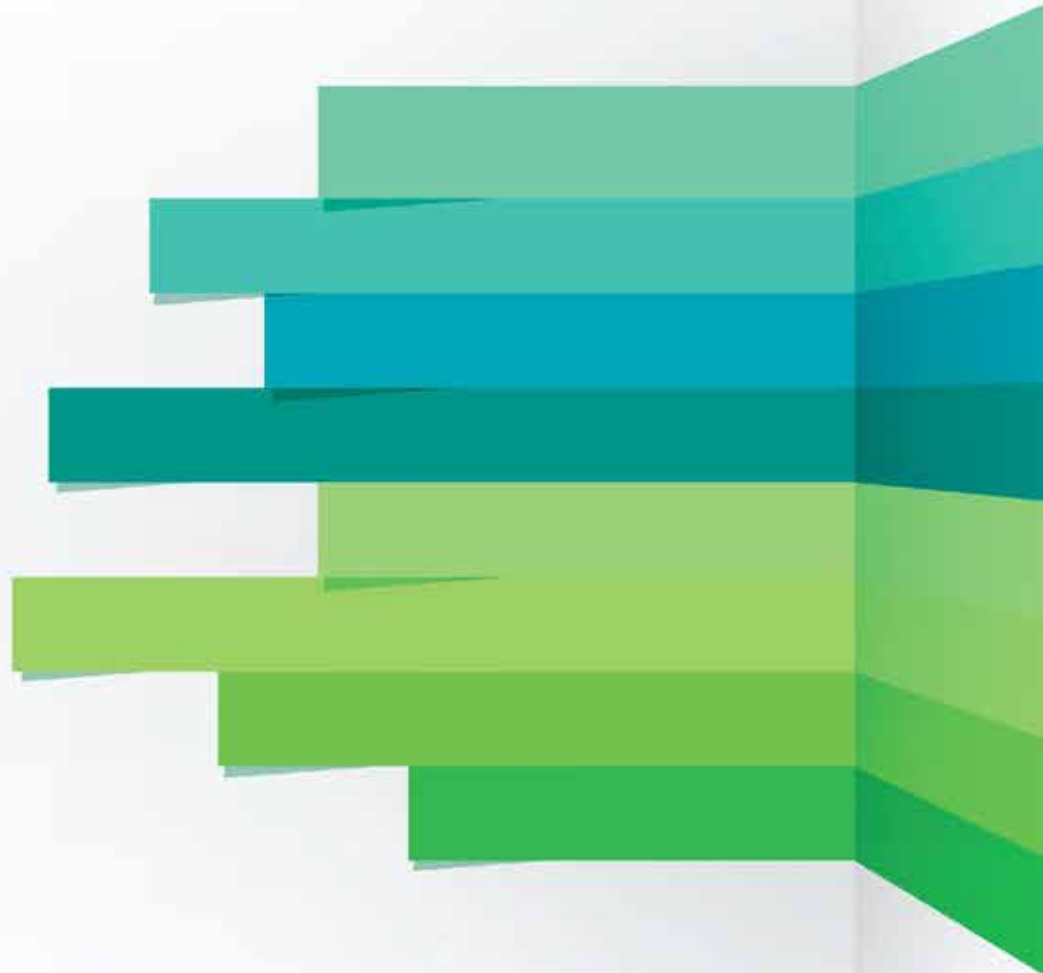
- Spruce Grove continues to grow and solidify itself as a self-sufficient regional and freestanding retail market.
- Spruce Grove's demographic profile is comprised of a young, family demographic with an emerging affluence and corresponding discretionary income.
- Spruce Grove's retail trade area catchment serves a market of almost 138,000 full time residents, which is forecast to increase to over 164,000 by 2027.
- The City of Spruce Grove currently has approximately 2.39 million sf of total **occupied** retail space.
- Current estimates for the trade area suggest current demand for 2.35 million sf of retail space.
- Future demand forecasts for new retail space over the next decade suggest that the City of Spruce Grove could grow by an additional 775,000 to 1 million sf.
- Spruce Grove's regional catchment is evidenced by a net sales inflow of \$697.1 million.
- Spruce Grove garners an estimated inflow of almost \$210.8 million in Convenience Merchandise retail sales of which \$156.3 million is in Grocery & Specialty Foods Sales.
- Spruce Grove has a leakage/outflow of just under \$49.2 million in Home Furnishings and Home Electronics categories (\$29.0 million and \$20.2 million respectively), as well as a further \$6.3 million in Footwear, \$3.5 million in Books & Media and \$340,000 in Toys & Hobbies.

- Spruce Grove has a total occupied office inventory of 225,000 sf excluding approximately 80,000 sf of new office space either recently completed or scheduled to come on stream in 2018.
- Forecast for new office space indicates cumulative demand for approximately 200,000 sf by 2027.

### CONSIDERATIONS

- Ensure that retail growth does not come at the expense of the City Centre's revitalization efforts.
- Prioritize future retail developments that respond to tenant-driven, consumer-driven and market-driven demand.
- Undertake Retail Impact Assessments to make sure that projects are feasible and that their impact on existing retail is not detrimental within reason.
- Prioritize key target categories and tenants that can benefit from the sales inflow as well as curbing some outflow.
- Over the next decade and in addition to demand from population growth, the City of Spruce Grove should strive to increase its market share of retail spending from **City** Residents from an estimated 57% today to 60% and an increase of **Total** Retail Trade Area market share penetration from 48% to 53%. An increase in market share not only provides a rationale for attracting new businesses, it equally as importantly provides a necessary framework for local independent stores to increase their profitability and resulting stability in the community in the face of competition. Simply put, an increasing market share does not always mean new space, but could mean more sales for existing businesses.

HERE  
WE  
GROW



# 1 INTRODUCTION

## 1.1 SCOPE OF STUDY & PROJECT BACKGROUND

Cushing Terrell Architecture Inc. (“Cushing Terrell”) was commissioned by the City of Spruce Grove in September 2017 to update the existing Retail & Office Market and Gap Analysis previously prepared in 2015.

The objective of this study is to document in detail and update the City of Spruce Grove’s current retail inventory, trading region, spending and resulting voids/opportunities and future demand in the market over the next decade.

Additionally, the study provides an inventory of office space and resulting demand for future office growth in the City over the next decade.

## 1.2 REPORT STRUCTURE

Cushing Terrell conducted on-the-ground research in September 2017 to gain a firm understanding of existing and future retail projects and prospects in Spruce Grove. 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 and to whom such gaps should be targeted.

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 Spruce Grove as a location in which targeted retailers or office tenants could express interest.

### **Section 3 - Retail Trade Area Profile:**

Identifies and defines the Retail Trade Area comprised of a Primary and Secondary Trade Area and documents the population and expenditure 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 Spruce Grove’s current nodes of retail activity (“Supply”), including developing or future planned retail sites. Fieldwork assessments included identifying and quantifying the entire city’s retail inventory by node, retailer and merchandise category.

### **Section 5 – Retail Demand & Gap Analysis:**

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



*Photos Courtesy of City of Spruce Grove, 2017*

### **Section 6 - Office Market Supply:**

Assesses the location and characteristics of Spruce Grove's current nodes of office activity ("Supply"). Fieldwork assessments included identifying and quantifying the entire city's office inventory by node and tenant.

Using population and employment growth estimates as well as measures of typical office demand requirements, Spruce Grove's future cumulative office demand, in terms of new floorspace, is quantified to gauge how much and where such demand could be allocated over the next decade.

### **Section 7- Consumer Intercept Survey:**

A Consumer Intercept Survey was conducted in 2015 in which the full-time and part-time residents of Spruce Grove 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 Spruce Grove along with their current spending habits and importance ratings for the types of new retail categories that the City could pursue to enhance the offering and retain expenditure within the community.

### **Section 8 - Conclusion:**

Conclusions highlight and summarize the most salient Market Analysis Findings as well as missing merchandise categories and identify a roster of potential market-compatible retailers whose typical site selection criteria match the Retail Trade Area demographics and locational attributes of Spruce Grove.



# 1

## 1.3

### SOURCES OF INFORMATION

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

In addition to 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 Spruce Grove Strategic Plan, 2015 - 2035
- City of Spruce Grove Corporate Plan 2016 - 2018
- City of Spruce Grove Municipal Development Plan, 2010-2030
- City of Spruce Grove Economic Development Strategy & Action Plan, 2017 - 2022
- City of Spruce Grove Municipal Census; 2017 Demographic Report
- City of Spruce Grove West Central Area Structure Plan 2017
- City of Spruce Grove Traffic Counts 2015
- City of Spruce Grove 2016 Development Activity Report and 2017 mid-year Development Activity Report
- City of Spruce Grove, 2017 Building Permit Summary Report (year-to-date)
- Pitney Bowes, 2017 Demographic & Household Spending Data (via Sitewise Pro)
- Keyfax Market Research Consumer Intercept Survey, 2014/2015.
- Statistics Canada North American Industry Classification System, 2017

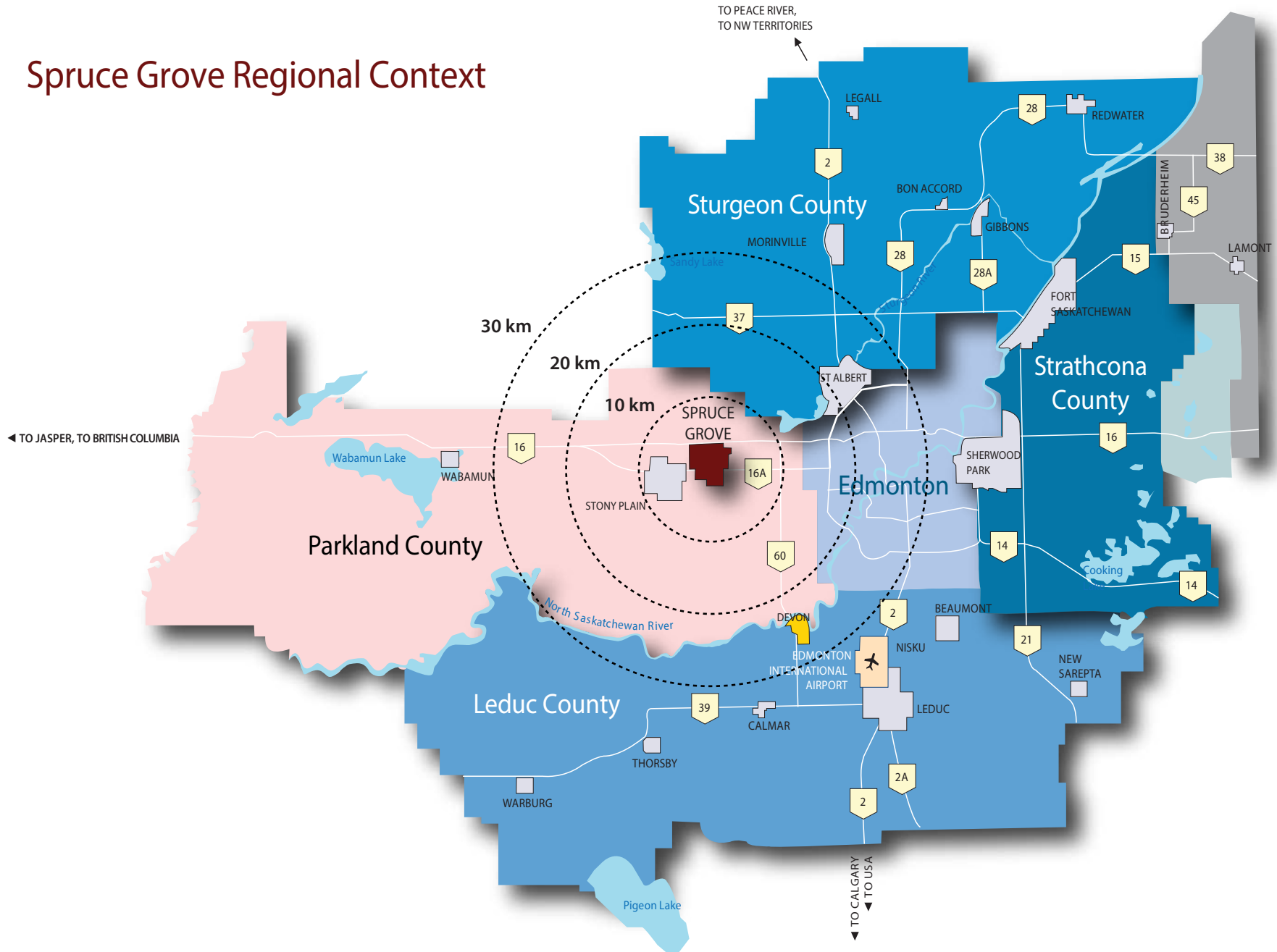
- Cushing Terrell Architecture Inc. Detailed Retail Inventory Fieldwork, September 2015 and 2017.

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

- Statistics Canada, 2017
- Colliers International
- Avison Young
- Qualico Developments
- Bermont Realty
- Royal LePage Noralta Real Estate
- Cushman & Wakefield
- Barclay Street Real Estate
- Brentwood Developments
- Melcor Developments
- Strathallen Developments
- ONE Properties (formerly WAM Development Group)
- Warrington Pacific Property Management

Figure 2.1  
CITY OF SPRUCE GROVE CONTEXT MAP

## Spruce Grove Regional Context



# 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 Spruce Grove'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 Spruce Grove regional context as it relates to its relationship with Parkland County as well as the west side of the City of Edmonton.

## 2.2

### REGIONAL CONTEXT

According to the most recent Municipal Census, the City of Spruce Grove has experienced growth averaging 4.9% per year over the 5-year period 2012 to 2017. **The current population of Spruce Grove is now estimated at 34,881.**

Further indication as to the robust growth of Spruce Grove, despite the recent economic recession is indicated by the pace of residential building permits in the City of Spruce Grove. According to the City's 2016 Development Activity Report, *"Growth in Spruce Grove has generally been stronger than average for the Capital Region. During the last decade, this community experienced unprecedented growth. With the exception of a cooling off period over the next few years, growth rates greater than regional average are expected to continue."*

In response to population growth that has continued to exceed projections and given the historical pattern of growth in Spruce Grove it is not unreasonable to suggest that the high growth scenario will be most likely for Spruce Grove.

In fact, the City's own Corporate Plan for 2016-2018 estimates that by 2024 the City's population could reach 44,000.

Not to be overshadowed as it relates to the rapid growth, the neighbouring Town of Stony Plain has grown by an average of 3.9% per year over the six year period 2010 to 2016, whereby the current Stony Plain population is estimated at over 17,200 (Statistics Canada 2016 - 17,189).

Contextually, as shown in **Figure 2.1**, the City of Spruce Grove is located approximately 13 km from the Anthony Henday Highway interchange or approximately a 10 – 12 minute drive time.

Spruce Grove's regional-serving location and surrounding highway infrastructure ensure that the City has excellent and quick access to smaller towns located to the west and thus serves as a major retail and service node for the region.

Spruce Grove is also located along the primary CN Rail Line, which connects directly to a new CN Intermodal facility located approximately 10-minutes east of Spruce Grove, which is a further attraction to the living and working in or near Spruce Grove.

Surrounding and within Spruce Grove are the major Industrial Parks including Acheson, which employs over 10,000 people and is forecast over the next 10-20 years to have significant growth, and the Spruce Grove Industrial Parks which employs almost 2,500 people. These represent significant economic drivers for the local economy and the future Meridian Business Park (currently zoned, but not developed) in Parkland County will only further establish the area as an employment hub, for which supportive and regional serving retail will need to be provided.

In addition to the major employment nodes noted previously, **Table 2.1** identifies the Top Employers within the City of Spruce Grove and how this has changed over the last decade.

Table 2.1

**MAJOR EMPLOYERS - HISTORIC GROWTH 2008 TO 2017**

Top Employers	2008	2010	2012	2014	2017
Parkland School Division	255	270	270	375	475
Real Canadian Superstore	250	230	375	375	340
City of Spruce Grove <sup>1</sup>	140	220	240	240	330
Wal-Mart	230	245	300	300	300
Evergreen Catholic School Division	145	173	175	203	255
Copper Sky Lodge				150	180
TransAlta Tri-Leisure Centre	70	85	148	148	180
Evolved Energy					150
Home Depot	120	120	120	120	125
Cargill Value Added Meats	85	98	105	105	108
Save On Foods			114	114	101
Sobeys Capital Incorporated & Safeway			120	120	100
Elizabethan Catering Services			100	100	100
Canadian Tire	130	150	100	100	100
Zender Ford/FI X Auto	50	55	68	68	84
Copperline Excavating					70
Winners				56	56
Rona Home Centre	75	75	75	75	51
TransCanada Pipelines Ltd			100	100	50
Sandhills Manufacturing				50	50
Hoerbiger				60	43
Michael's Crafts				55	40
BeeMaid (Alberta Honey Producers)				40	40
Thompson Bros. Construction	55	55	55	40	40
M-I-Swaco/Schlumberger	39	47	47	35	35

Source: City of Spruce Grove Oct 2017

# 2

It is worthy to note that in the list, there are 10 retailers as major employers, illustrating the significant role they play in generating employment for the local economy as the majority of these employees likely reside in Spruce Grove or Stony Plain.

The strong regional access and mobility attributes of Spruce Grove are critical in attracting new forms of economic opportunities for the City. Accordingly, Spruce Grove's local economy continues to diversify on a number of fronts due in part to the industrial growth in Spruce Grove and the adjacent Acheson Industrial area. Other areas of diversification include the following:

- Logistics and Distribution Centres continue to express interest in Spruce Grove (and Acheson) with associated office operations that can benefit from the affordability and accessibility of the area for operations, as well as the quality of life attributes for employees.
- Spruce Grove is located on the primary highway to Jasper. This location as the last major urban location en route to the Mountains and other major outdoor recreation has created an opportunity to focus on Recreation and Event Tourism as pillars of economic growth for the community.
- The wide regional appeal and attraction of the TransAlta Tri-Leisure Centre, Fuhr Sports Park and recently opened Border Paving Athletic Centre at the Tri-Leisure Village along with the potential for an Events Centre/Arena at the Westwind Centre are testament to the fact that Spruce Grove is becoming a recognized Sports Tourism destination.
- The recently opened NAIT College in Spruce Grove is further evidence of the academic attainment level of the local population as well as the rapidly evolving technical workforce and growth of the City as a strategic location for post secondary academic alternatives.

- Back office and applied technology functions (such as Customer Relationship Management and Finance/Insurance/Real Estate) are increasingly prominent and could have a direct relationship to the major Industrial Parks located in Spruce Grove and Parkland County.
- This increasing level of economic diversification, proximity to and relative affordability, when compared to the City of Edmonton has kept Spruce Grove's unemployment rate at relatively healthy levels in recent years.

**Overall, Spruce Grove's advantageous regional location is a key to its future success as a target market for local and regional retail tenants.**

## 2.3

### MUNICIPAL DEVELOPMENT PLAN

As a critical component to successful Business Retention, Expansion and Attraction ("BREA") and consequently overall economic development, the City of Spruce Grove is proactive in responding to challenges that result from strong growth demands, while at the same time putting policies and plans in place to accommodate growth.

Future growth will not only occur in new areas such as in the northeast (Westwind), east of the City (Pioneer Rd Lands) and west (northwest corner of Jennifer Heil & Hwy 16A), but is also to be focussed on revitalizing and enhancing the "City Centre Commercial District" as a place for redevelopment and reinvestment into creating a vibrant live, work and shopping environment.

#### CITY CENTRE REVITALIZATION

According to the City's Corporate Plan 2016 – 2018, Strategy 3.1.1 outlines the following:

*We will revitalize the city in ways that contribute to the community's overall commercial success*

*Develop a Vision and Strategy for City Centre Revitalization in Spruce Grove*

Figure 2.2  
**CITY OF SPRUCE GROVE FUTURE LAND USE**

Source: City of Spruce Grove, Municipal Development Plan

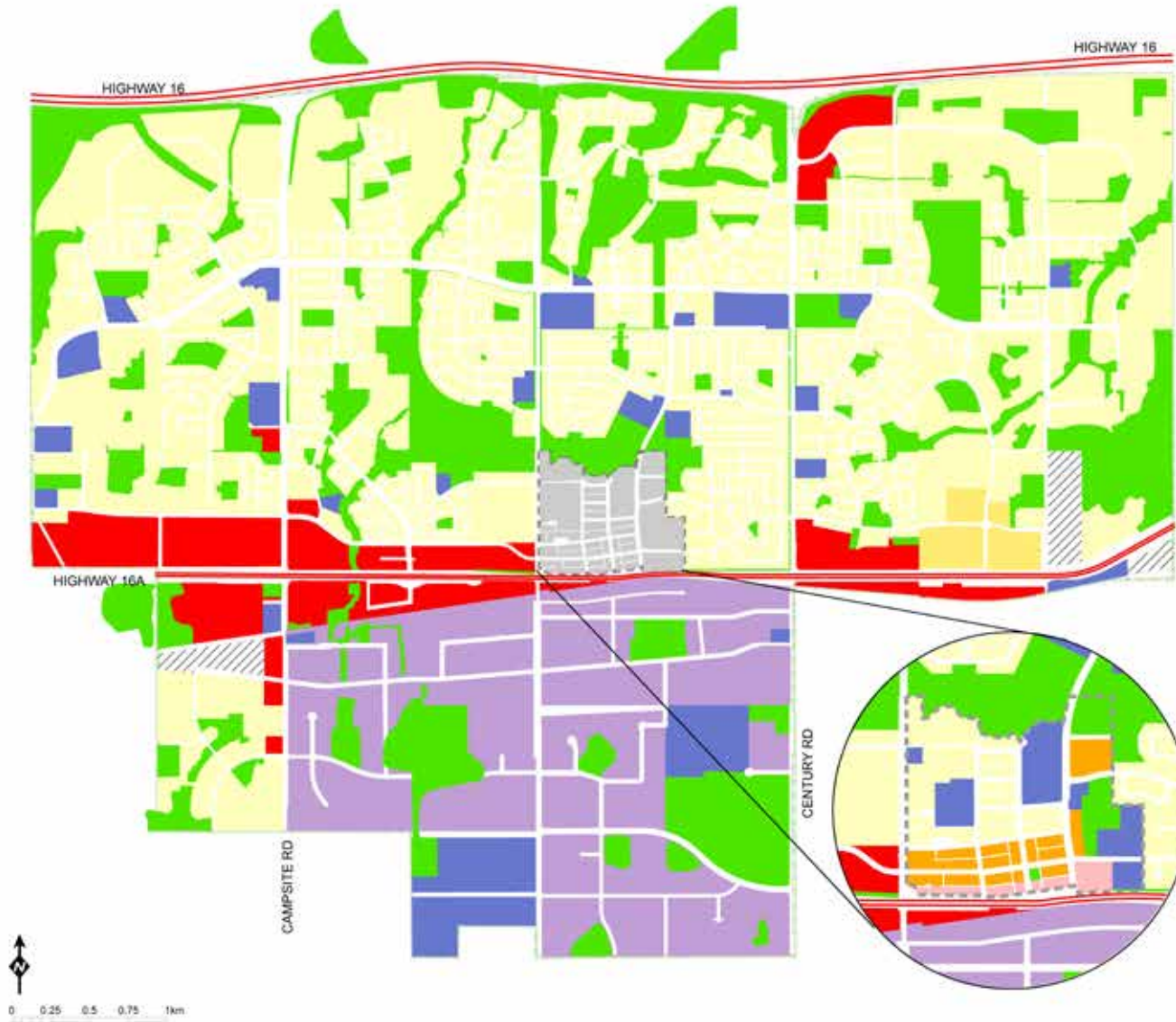


Figure 8  
 Future Land Use

- City Centre Boundary
- Residential
- Urban Village
- Mixed Use
- First Ave Commercial
- Vehicle Oriented Commercial
- Industrial / Business Park
- Institutional
- Open Space
- Special Study Area
- City Boundary

SPRUCE GROVE  
 Municipal Development Plan  
 2010-2020

November 2010

# 2

In 2014, the City completed a City Centre Revitalization Discussion Paper that paved the way for the creation of a City Centre Business Improvement Association and further community visioning workshops in the Fall 2016.

From this activity, the City recently commenced in Fall 2017 a more detailed City Centre Area Redevelopment Plan which will investigate the future land use, urban design and infrastructure to set the stage for providing commercial and residential opportunities and redevelopment in the City Centre. The City Centre Area Redevelopment will establish implementation steps outlined for the short (1-2 years), medium (2 to 5 years) and longer term (5 to 10+ years) horizons to help facilitate infill and redevelopment for the betterment of the community and business retention/attraction.

Although the City Centre ARP will make recommendations for land uses and design guidelines, the current City Land Use Bylaw (September 2012), Section 121 articulates the following vision for the C1 Zone – City Centre Commercial District, which states the following general purpose:

*“This District is to provide continuous storefront retail development on the ground floor frontage, to encourage pedestrian activity, and to provide opportunity for residential development above the ground floor in the City Centre. Other civic, cultural and institutional uses are encouraged in this District.”*

Permitted uses in the new proposed C-1 Zone include Eating & Drinking Establishments, Government Services, Health Services, Mixed-Use Development, Personal Services Establishments, Professional & Office Services, Public Libraries & Cultural Facilities, Retail Sales and Theatres.

The City Centre’s C-1 and C-2 Commercial Areas are largely delineated by King Street to the East, Calahoo Road to the West, Hwy 16A to the South and Church Street to the North.

The new Land Use Bylaw now incorporates more C-1 Zoning in the City Centre as opposed to the amount of C-2 Zoning previously allotted.

Additionally, the City Centre, under the new Land Use Bylaw proposes more R-2 Zoning, which would allow for Mixed Medium to High Density Residential land uses. The result of the more consolidated Commercial Zoning combined with the density increases for the City Centre, will create a framework for increased population within a walkable distance of the main commercial core and correspondingly increased retail demand.

Although considerable new retail development and opportunities are taking place at the edges of the City, the City Centre represents an important future location for retail opportunities for local independent retailers as well as chain store operations. Restaurants, Personal Services and Conveniences top the list of potential tenants that should be targeted and attracted in conjunction with ongoing redevelopment of the City Centre.

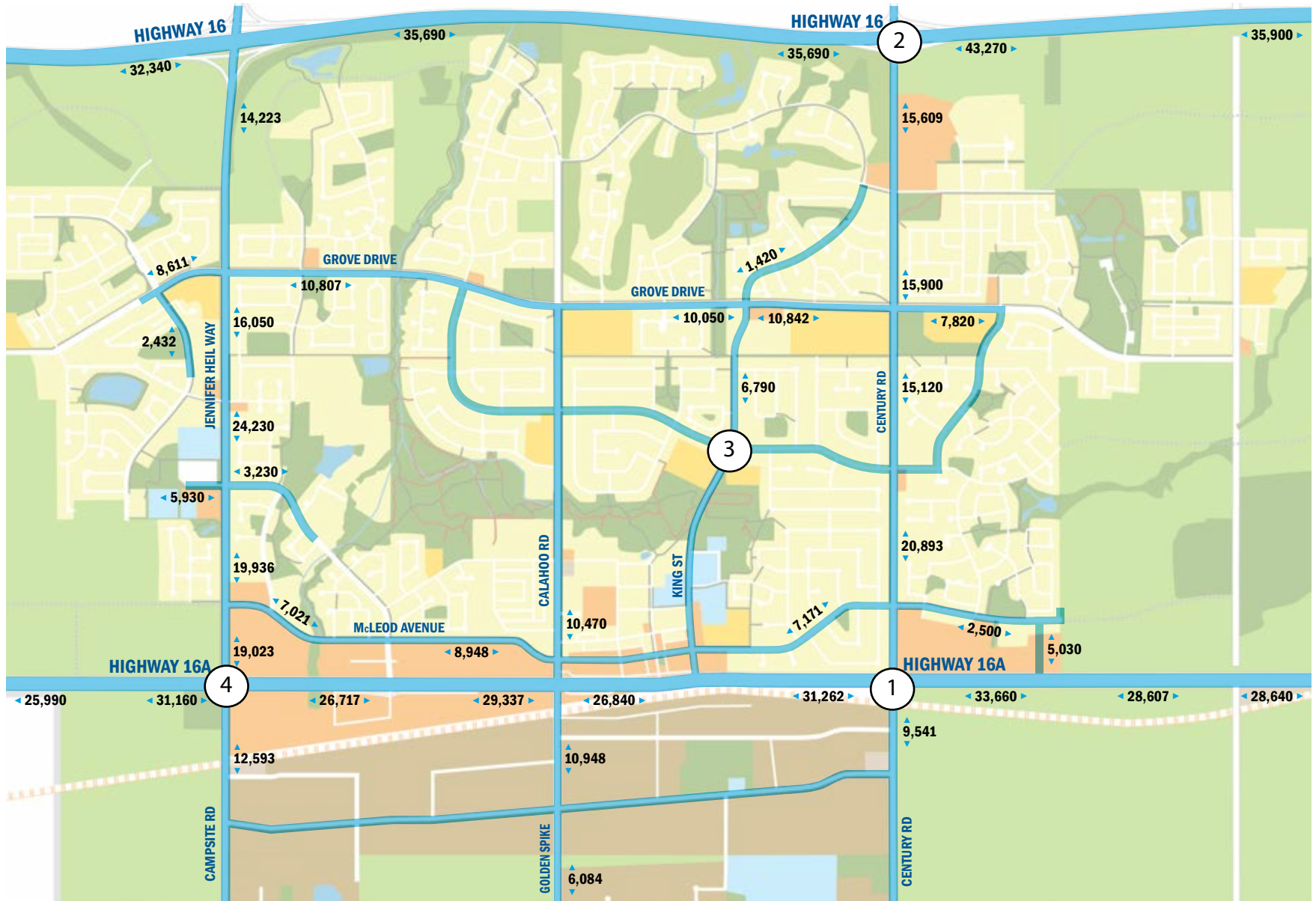
Projects such as the Queen Street Professional Centre, the King Street Plaza, McQueen Centre (Wilhawk’s) and future relocation of Main Street Law into a new building along First Ave in 2018 represent new developments that frame the City Centre, which are also anchored by new multi-family condominium developments.

Further infill and redevelopment opportunities will become more opportunistic along McLeod Avenue over the next few years, thus helping to stimulate the revitalization of the City Centre area thereby making it more appealing for attracting and retaining tenants.

## 2.4 COMMERCIAL LAND USE CONTEXT

**Figure 2.2** shows the current and future commercial lands in the City. The areas shown in red depict land currently zoned for Commercial Land Uses as well as major future commercial development is or may be situated.

Figure 2.3  
**CITY OF SPRUCE GROVE TRAFFIC COUNTS**  
 Source: City of Spruce Grove 2015





# 2

fact

33,000 vpd

Minimum Highway 16 & 16A traffic volume

## 2.5

### TRANSPORTATION CONTEXT

One of the most significant aspects to successful commercial development relates to the patterns of transportation. Most significantly to retail businesses, the ability to be accessible as well as visible to high volumes of traffic is among their most major considerations. For a regional market such as Spruce Grove, a retail location relative to strong and accessible transportation patterns remains an important component, as illustrated by the growth at Century Crossing along Hwy 16A and the future development at Westwind along Hwy 16. Accordingly, **Figure 2.3** reveals the major high volume traffic corridors.

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

#### 1) Hwy 16A & Century Rd

Hwy 16A east = 33,660  
Hwy 16A west = 31,262  
Century Road South = 9,541  
Century Road North = 20,893

#### 2) Hwy 16 & Century Rd

Hwy 16 West of Century Rd = 35,690  
Hwy 16 East of Century Rd = 43,270  
Century Rd South = 15,609

#### 3) Grove Drive & King St

Grove Drive East = 10,842  
Grove Drive West = 10,050  
King St South = 6,790

#### 4) Hwy 16A & Jennifer Heil Way/Campsite Rd

Hwy 16 East = 26,717  
Hwy 16 West = 31,160  
Jennifer Heil Way = 19,023  
Campsite Rd South = 12,593

Traffic patterns closely mirror retail hot spots particularly in the central areas where the largest concentrations of traffic flows in excess of 30,000 vehicles per day along Hwy 16A between Century Rd and Jennifer Heil Way and in excess of 40,000 along Hwy 16 at Century Rd.

Traffic patterns continue to suggest strong inflow from the west as well as indicating a commuter surge at the intersection of Century Rd and Hwy 16.

## 2.6

### DEVELOPMENT & BUILDING PERMITS

A review of data on development and building permits in the City of Spruce Grove over the last several years illustrates a sustained pattern of strong development activity, particularly residential.

Over the period of 2009-2017 (year-to-date), the City of Spruce Grove has exhibited strength and resiliency as evidenced by an average of over 900 annual permits issued for all types of sectors (**Table 2.2 & Figure 2.4**).

2017 is showing a resilience on the heels of the recent provincial recession and is expected to again show growth in the range of 600 to 700 building permits.

The value of the ALL Commercial Building Permits for 2016 amounted to \$14.2 million.

Since 2009, the City has averaged around 7 new Commercial Permits per year with an average total value of new permits at around \$13.5 million per year. 2017, as of September had already seen 9 new Commercial Permits at a value of \$5.4 million.

Table 2.2  
**CITY OF SPRUCE GROVE BUILDING PERMITS**  
 (Source: City of Spruce Grove)

Year	Residential (New)	Residential (Improvements including garages)	Commercial (All)	Industrial (All)	Institutional (All)	TOTAL
2017 to Sept	252	285	42	10	6	595
2016	333	409	51	12	7	812
2015	572	590	72	22	3	1,259
2014	679	614	55	38	1	1,387
2013	573	458	57	21	5	1,114
2012	441	403	53	23	1	921
2011	372	319	47	33	3	774
2010	391	319	36	25	6	777
2009	290	367	33	7	5	702

Figure 2.4  
**CITY OF SPRUCE GROVE BUILDING PERMITS**  
 (Source: City of Spruce Grove)

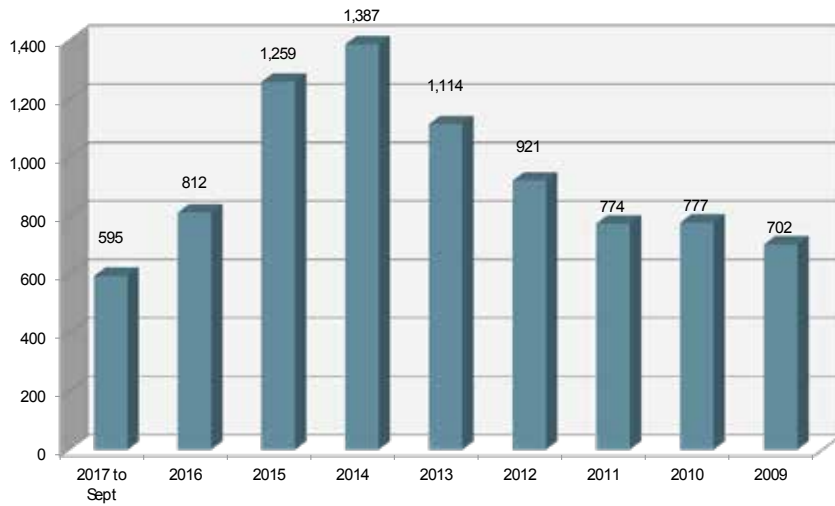
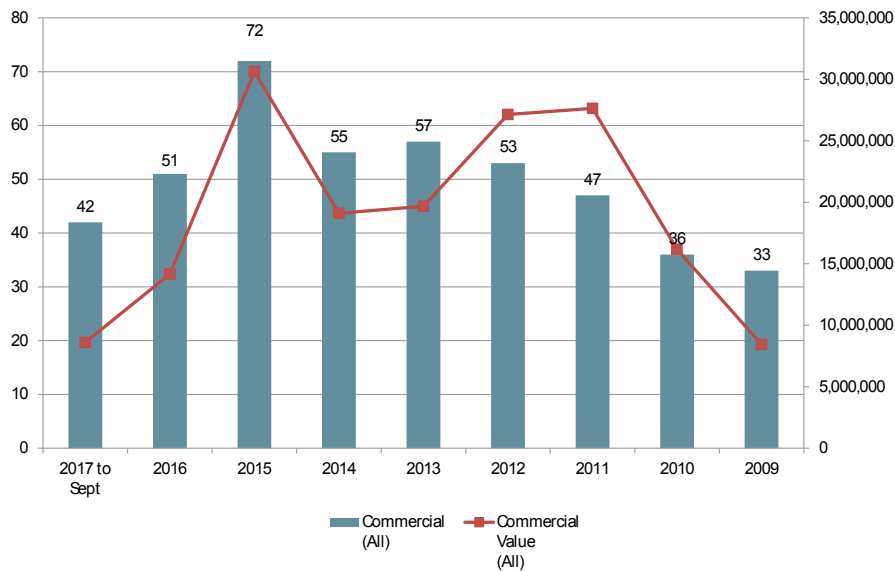


Figure 2.5  
**CITY OF SPRUCE GROVE COMMERCIAL BUILDING PERMITS & VALUE**  
 (Source: City of Spruce Grove)



# 2

fact

456 New Residential Building Permits average per year over period 2009 to 2016

Referring to **Table 2.2**, new residential building permits continue to be dominant in the City, averaging 456 permits per year over the period 2009 to year end 2016.

As of September 2017 there have been 252 new residential building permits issued.

Even though the amount of residential building permits is not at historic high levels, the key component is that growth has continued in Spruce Grove in the face of recessionary pressures that have impacted other communities. Spruce Grove remains a very attractive residential investment in terms of affordability and quality of life.

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

Overall building permit data reinforces the significant growth dynamics of Spruce Grove as a regional market.

## 2.7

### SUMMARY & IMPLICATIONS

The City of Spruce continues to be a market supported by robust growth dynamics in terms of population growth, new residential development activity and commensurate retail opportunities.

The City's location as a regional hub for western communities including Stony Plain, those in Parkland County and beyond remains a key factor in the success of the City in garnering commercial opportunities.

The historic pattern of development permits and growth in traffic volumes along major arterials further validates Spruce Grove's emergence as a regional city centre and a thriving, *"prosperous, self-sustaining regional economic home to competitive, successful commercial and industrial companies."*

# 3 RETAIL TRADE AREA PROFILE

## 3.1

### INTRODUCTION

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

As a first step, a Retail Trade Area was delineated to identify the geographic region from which regular patronage could be expected based on a series of boundary determinants. Referring to **Figure 3.1** and for the purposes of this study, the Retail Trade Area is the area that includes both the Primary Trade Area (PTA) and Secondary Trade Area (STA). Any such reference to the Retail Trade Area includes both the PTA and STA, unless each one is specifically identified.

The Retail 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 and ultimately provides a rationalization for achievable market shares attributable to the Retail Trade area spending segments (PTA and STA).

The major considerations in delineating the Retail Trade Area are outlined in the following. These principles were applied to the City of Spruce Grove's context to determine its Retail Trade Area, as well as to help sensitize future market share inputs from the PTA and STA.

#### Retail Trade Area Determinants

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

As mentioned previously, the Retail Trade Area is the geographic region from which the City of Spruce Grove will draw regular patronage from local and regional residents.

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

Figure 3.1

SPRUCE GROVE RETAIL TRADE AREA

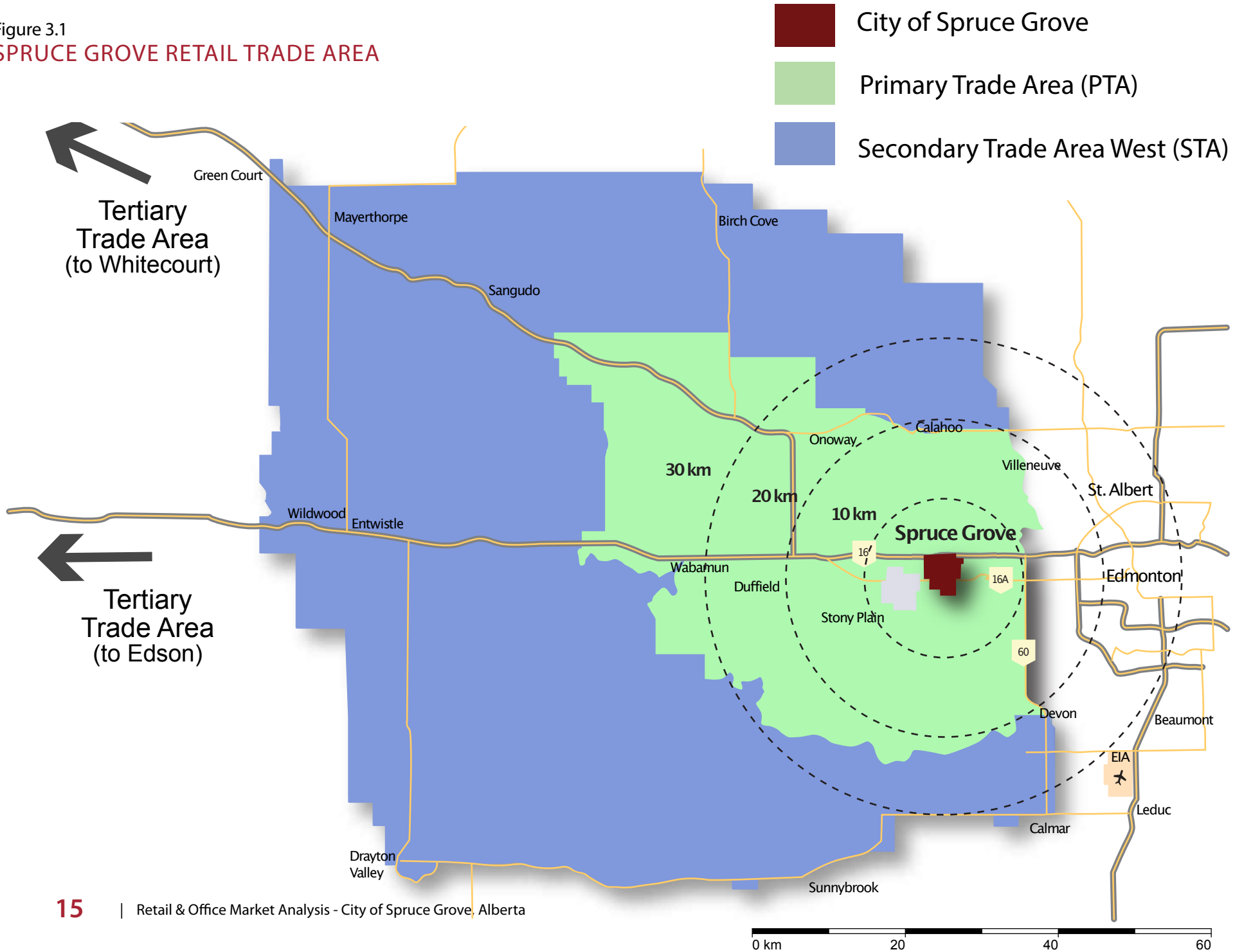


Table 3.1

## RETAIL TRADE AREA DEMOGRAPHIC PROFILE

(Source: City of Spruce Grove 2017 Demographic Report, Sitewise Pro/Pitney Bowes and Cushing Terrell Architecture Inc)

2017 Demographic Snapshot	Primary Trade Area (Including City of SG)		Secondary Trade Area		Spruce Grove (City)		Edmonton (City)	
		%		%		%		%
2011 Census*	84,638		39,833		26,711		844,116	
2017 Population estimate for PTA & STA City of Spruce Grove Municipal Census 2017	96,151		41,321		34,881		976,061	
2022 Population projection	107,996		41,340		43,824		1,063,479	
2027 Population estimate	122,545		41,555		55,059		1,161,737	
% Population Change (2011-17)	13.6%		3.7%		30.6%		15.6%	
% Population Change (2017-22)	12.3%		0.05%		25.6%		5.4%	
% Population Change (2020-27)	13.5%		0.5%		25.6%		9.2%	
<b>2017 Population by Age</b>	<b>96,151</b>		<b>41,321</b>		<b>34,881</b>		<b>976,061</b>	
0 to 4 years	6,414	7%	2,718	7%	2,825	8%	58,686	6%
5 to 19 years	18,685	19%	7,644	18%	7,325	21%	148,816	15%
20 to 24 years	5,229	5%	2,141	5%	2,058	6%	70,733	7%
25 to 34 years	13,662	14%	5,656	14%	5,895	17%	187,782	19%
35 to 44 years	14,535	15%	5,717	14%	5,511	16%	149,982	15%
45 to 54 years	13,158	14%	5,604	14%	4,116	12%	123,115	13%
55 to 64 years	12,998	14%	5,783	14%	3,488	10%	115,324	12%
65 to 74 years	7,689	8%	3,844	9%	2,372	7%	68,146	7%
75 to 84 years	2,844	3%	1,624	4%	698	2%	36,233	4%
85 years and over	935	1%	589	1%	593	2%	17,244	2%
<b>Median Age</b>	<b>37.7</b>		<b>39.1</b>		<b>34.3</b>		<b>36.3</b>	
<b>2017 Families</b>	<b>29,493</b>		<b>12,643</b>		<b>9,991</b>		<b>276,654</b>	
Married couples	21,784	74%	9,118	72%	7,258	73%	188,196	68%
Without children at home	10,061	34%	4,613	36%	3,059	31%	76,887	28%
With children at home	11,724	40%	4,504	36%	4,199	42%	111,309	40%
Common-law couples	3,831	13%	1,822	14%	1,364	14%	36,145	13%
Without children at home	2,086	7%	999	8%	738	7%	24,223	9%
With children at home	1,745	6%	823	7%	626	6%	11,922	4%
Lone-parent families	3,877	13%	1,703	13%	1,369	14%	52,313	19%
Average Persons Per Family	2.9		2.8		2.9		2.8	
Average Children Per Family	1.0		0.9		1.0		1.0	
<b>2017 Households</b>	<b>35,611</b>		<b>16,252</b>		<b>12,919</b>		<b>393,962</b>	
Persons per household	2.7		2.5		2.7		2.5	
Average household income	\$ 126,670		\$ 105,204		\$ 121,046		\$ 110,315	
Median Estimated Household Income	\$ 102,319		\$ 83,287		\$ 101,741		\$ 82,037	
<b>2017 Population 25 to 64 years by Educational Attainment</b>	<b>54,354</b>		<b>22,760</b>		<b>19,233</b>		<b>576,203</b>	
No certificate, diploma or degree	7,477	14%	4,183	18%	2,323	12%	61,350	11%
High school diploma or equivalent	13,987	26%	6,860	30%	4,658	24%	130,746	23%
Apprenticeship or trades certificate or diploma	10,338	19%	4,469	20%	3,563	19%	57,795	10%
College, CEGEP or other non university certificate or diploma	13,301	24%	5,021	22%	5,157	27%	122,738	21%
University certificate or diploma below bachelor level	1,318	2%	211	1%	512	3%	24,617	4%
Bachelor's degree	6,666	12%	1,798	8%	2,525	13%	120,324	21%
University certificate, diploma or degree above bachelor level	1,266	2%	219	1%	495	3%	58,633	10%
<b>2017 Population by Marital Status (15 years+)</b>	<b>76,876</b>		<b>33,305</b>		<b>26,184</b>		<b>817,260</b>	
Single	17,241	22%	7,182	22%	5,996	23%	257,465	32%
Common-Law	7,807	10%	3,680	11%	2,759	11%	72,568	9%
Married	43,541	57%	18,258	55%	14,486	55%	377,407	46%
Divorced or Separated	5,542	7%	2,576	8%	2,148	8%	73,289	9%
Widowed	2,744	4%	1,610	5%	795	3%	36,531	4%
<b>Top 3 Dominant Languages</b>	English French Tagalog (Pilipino)		English German French		English French Tagalog (Pilipino)		English Punjabi Chinese	

# 3

fact

~138,000 residents (2017)

Total Retail Trade Area Population

Spruce Grove serves as a regional hub for employment and services for a vast region extending west of the City's boundary. **Figure 3.1** illustrates the scope of the Spruce Grove Retail Trade Area, which extends to smaller communities such as Sangudo and Mayerthorpe to the Northwest along Hwy 43, and Entwistle and Wildwood to the West along Hwy 16. Each of these areas are approximately a 1-hour drive time away from the City of Spruce Grove, yet easily accessible.

Beyond the STA, Spruce Grove also attracts consumers from what could be called a "Tertiary Trade Area" that extends northwest to include the Town of Whitecourt and east to include the Town of Edson, as well smaller rural communities southwest of the STA. These segments represent additional sources of patronage to Spruce Grove, albeit on a less frequent basis, but often for bigger ticket, larger or bulk purchases.

For this particular study, the Retail Trade Area (and its boundary) shown in **Figure 3.1** has been cross-referenced and subsequently validated by a Consumer Intercept Survey, which will be documented in **Section 7.0**. The Consumer Intercept Survey uses postal codes of respondents to confirm and modify the Retail Trade Area as shown.

The Retail Trade Area is therefore divided into a Primary Trade Area (PTA), which includes the City of Spruce Grove and Town of Stony Plain and also extends west to include the Town of Wabamun and northwest to include the Town of Onoway.

The PTA extends east to the Hwy 60, where it becomes more of a choice for consumers to select West Edmonton or Spruce Grove for their daily and destination shops and services.

Similarly, a Secondary Trade Area (STA) reflects the significant and wider draw that the City of Spruce Grove has in attracting residents and consumers from more distant and under served towns further west, northwest and southwest of the City's boundaries, such as Sangudo, Entwistle, Wildwood and Mayerthorpe.

Accordingly, the resulting Retail Trade Area delineation for Spruce Grove emphasizes its regional-serving orientation to communities predominantly skewed to the west, northwest and southwest.

Having delineated the Retail Trade Area, various demographic data was extracted to understand the particular nuances of the Retail Trade Area's residents and consumer base. This data was sourced primarily from the Statistics Canada, Pitney Bowes, and was further sensitized by data provided by The City of Spruce Grove, Town of Stony Plain and Parkland County as a result of the most recent Municipal Census 2017 Demographic Report (July 2017).

## 3.2 POPULATION PROJECTIONS

Using data sources that include the City of Spruce Grove, which recently published a Municipal Census (July 2017), Statistics Canada and Pitney Bowes, population estimates and growth forecasts were tabulated for the PTA and STA and further compared to the Edmonton average, where applicable.

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

Table 3.2

**RETAIL TRADE AREA HOUSEHOLD PROFILE**

(Source: City of Spruce Grove 2017 Demographic Report, Sitewise Pro/Pitney Bowes and Cushing Terrell Architecture Inc)

2017 Estimates and Projections Households and Dwellings	Primary Trade Area (Including City of SG)		Secondary Trade Area		Spruce Grove (City)		Edmonton (City)	
		%		%		%		%
<b>2017 Households by Size of Household</b>	<b>35,541</b>		<b>16,252</b>		<b>12,397</b>		<b>393,962</b>	
1 person	6,603	19%	3,810	23%	2,327	19%	117,633	30%
2 persons	13,732	39%	6,280	39%	4,544	37%	129,002	33%
3 persons	5,755	16%	2,440	15%	2,197	18%	61,891	16%
4 persons	5,671	16%	2,201	14%	2,176	18%	51,017	13%
5 persons	2,328	7%	923	6%	753	6%	20,929	5%
6 or more persons	1,453	4%	597	4%	400	3%	13,490	3%
<b>Persons in Households</b>	<b>94,897</b>		<b>40,872</b>		<b>32,975</b>		<b>956,203</b>	
Persons per household	2.67		2.51		2.66		2.43	
<b>2017 Occupied Private Dwellings by Tenure</b>	<b>35,541</b>		<b>16,252</b>		<b>12,397</b>		<b>393,962</b>	
Owner	30,431	86%	13,793	85%	10,007	81%	261,800	66%
Renter	4,561	13%	2,207	14%	2,390	19%	132,162	34%
Band housing	549	2%	252	2%	0	0%	0	0%
<b>2017 Occupied Private Dwellings by Structure Type</b>	<b>35,541</b>		<b>16,252</b>		<b>12,397</b>		<b>393,962</b>	
Single-detached house	27,131	76%	12,690	78%	8,797	71%	203,251	52%
Semi-detached house	1,740	5%	435	3%	1,031	8%	20,557	5%
Row house	910	3%	290	2%	546	4%	37,302	9%
Apartment; building that has fewer than five storeys	3,067	9%	875	5%	1,478	12%	88,622	22%
Apartment; building that has five or more storeys	110	0%	0	0%	107	1%	30,932	8%
Apartment; duplex	81	0%	111	1%	52	0%	9,825	2%
Other single-attached house	43	0%	17	0%	19	0%	107	0%
Movable dwelling	2,459	7%	1,834	11%	367	3%	3,366	1%
<b>2017 Households by Age of Maintainer</b>	<b>35,541</b>		<b>16,252</b>		<b>12,397</b>		<b>393,962</b>	
Under 25 years	1,082	3%	447	3%	522	4%	22,559	6%
25 to 34 years	5,401	15%	2,455	15%	2,786	22%	87,061	22%
35 to 44 years	7,731	22%	3,205	20%	2,989	24%	80,647	20%
45 to 54 years	7,323	21%	3,218	20%	2,290	18%	70,784	18%
55 to 64 years	7,412	21%	3,588	22%	1,997	16%	68,336	17%
65 to 74 years	4,855	14%	2,175	13%	1,364	11%	37,419	9%
75 years and over	1,735	5%	1,164	7%	449	4%	27,156	7%



# 3

fact

## 71% of Occupied Private Dwellings are Single Detached Houses in City of Spruce Grove

(52% City of Edmonton)

**Table 3.1** provides a breakdown of the Retail Trade Area Population in which the PTA is shown to include the municipal boundaries of the City of Spruce Grove. The purpose of this inclusion/exclusion was to allow for the City of Spruce Grove 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, particularly when compared to the Consumer Intercept Survey respondents from the City.

Referring to **Table 3.1**, the Retail Trade Area population forecasted to the end of 2017 is estimated to be in the range of 138,000 (137,472). This total trade area population is forecast to surpass 155,000 by 2027.

Within the Retail Trade Area, the PTA, which as noted includes the City of Spruce Grove is estimated to grow from 96,000 (96,151) in 2017 to over 113,000 (113,182) by 2027, representing an increase of over 17,000 new residents.

Within the Primary Trade Area, the City of Spruce Grove is forecast to grow from 34,881 in 2017 to an estimated 45,700 by 2027; an average annual growth rate of 2.8%. Thus, it can be seen the Retail Trade Area's future population growth will be driven by the Primary Trade Area and more specifically by the City of Spruce Grove itself.

Over the last 6-year period 2011 to 2017 (using the City's Municipal Census), the City of Spruce Grove grew from 26,171 to 34,881; an average annual growth rate of 4.9%.

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

With a City goal of revitalizing the City Centre, caution should always be taken to make sure that the further proliferation of retail does not jeopardize the revitalization strategy. Rather, any target development or opportunities should make sure that they are compatible and not in conflict with the City Centre.

### 3.3

#### HOUSEHOLD COMPOSITION

**Table 3.2** revealed average household sizes in the Retail Trade Area ranging from 2.6 to 2.7, which are all above the Edmonton and Provincial averages which are in the range of 2.5.

The higher than average household size is confirmation of the strong family orientation of the Spruce Grove market and provides further support for shops and services that cater to a younger demographic profile and for whom driving longer distances into the City may not always be a desirable option. For families, it is often preferred to have shops closer to home.

The preferred tenure of housing in Spruce Grove continues to be single family dwellings, as evidenced by the fact that 71% of the homes are single family (Edmonton average is 52%). The attractiveness of Spruce Grove as a location to raise a family is also further representative of the housing formats.

Moreover, 81% of the housing stock is owned as opposed to rented. The combination of relative affordability for new single family homes is major reason why Spruce Grove is growing at the pace that it is and why retailers are following this market segment. This trend is expected to continue, although additional multi-family housing options are expected to increase as the city matures and becomes a larger city.

Table 3.3

### RETAIL TRADE AREA POPULATION AGE BREAKDOWN

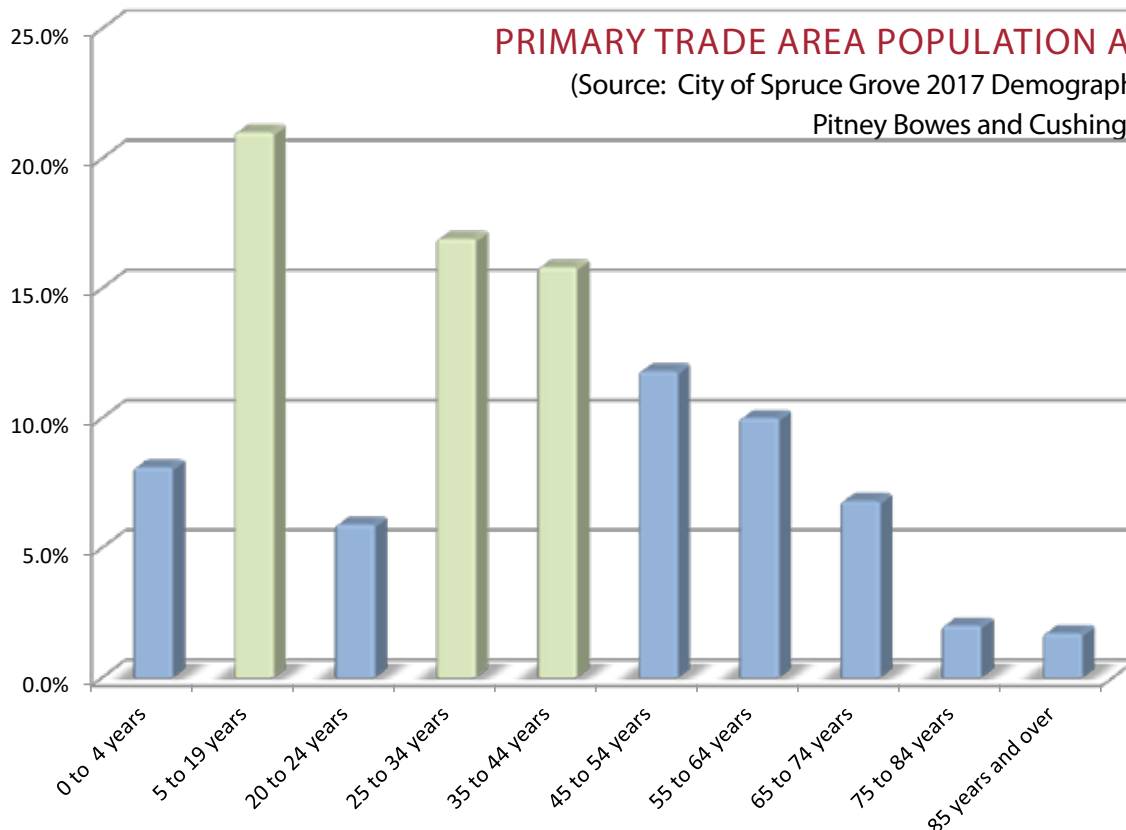
(Source: City of Spruce Grove 2017 Demographic Report, Sitewise Pro/Pitney Bowes and Cushing Terrell Architecture Inc)

2017 Estimates and Projections Population by Age and Sex	Primary Trade Area (Including City of SG)		Secondary Trade Area		Spruce Grove (City)		Edmonton (City)	
		%		%		%		%
<b>2017 Estimated Population</b>	<b>96,151</b>	<b>% base</b>	<b>41,321</b>	<b>% base</b>	<b>33,178</b>	<b>% base</b>	<b>976,061</b>	<b>% base</b>
0 to 4 years	6,414	7%	2,718	7%	2,626	8%	58,686	6%
5 to 9 years	6,696	7%	2,766	7%	2,409	7%	52,618	5%
10 to 14 years	6,165	6%	2,531	6%	1,959	6%	47,497	5%
15 to 19 years	5,823	6%	2,347	6%	1,895	6%	48,701	5%
20 to 24 years	5,229	5%	2,141	5%	1,986	6%	70,733	7%
25 to 29 years	6,052	6%	2,561	6%	2,829	9%	92,761	10%
30 to 34 years	7,610	8%	3,095	7%	3,388	10%	95,021	10%
35 to 39 years	7,615	8%	3,061	7%	3,046	9%	82,047	8%
40 to 44 years	6,920	7%	2,656	6%	2,337	7%	67,935	7%
45 to 49 years	6,529	7%	2,727	7%	1,986	6%	60,510	6%
50 to 54 years	6,629	7%	2,877	7%	1,876	6%	62,605	6%
55 to 59 years	6,738	7%	3,042	7%	1,922	6%	62,607	6%
60 to 64 years	6,260	7%	2,741	7%	1,849	6%	52,717	5%
65 to 69 years	4,635	5%	2,344	6%	1,299	4%	38,811	4%
70 to 74 years	3,054	3%	1,500	4%	827	2%	29,335	3%
75 to 79 years	1,816	2%	974	2%	469	1%	20,712	2%
80 to 84 years	1,028	1%	650	2%	217	1%	15,521	2%
85 years and over	935	1%	589	1%	258	1%	17,244	2%
<b>Median Age</b>	<b>37.7</b>		<b>39.1</b>		<b>34.3</b>		<b>36.3</b>	
<b>Dominant Age Group</b>	<b>35 to 39</b>		<b>30 to 34</b>		<b>30 to 34</b>		<b>30 to 34</b>	

Figure 3.2

### PRIMARY TRADE AREA POPULATION AGE BREAKDOWN

(Source: City of Spruce Grove 2017 Demographic Report, Sitewise Pro/Pitney Bowes and Cushing Terrell Architecture Inc)



# 3

fact

34.3 Years Old

Avg Age in Spruce Grove (36.3 Edmonton Avg)

3.4

## AGE PROFILE

A summary of the current age profile, as documented in **Table 3.3 & Figure 3.2** reveals a very strong family profile with a significant segment in the 5 - 19 year age cohort and young adults entering their high income earning years, with an average age in the City of Spruce Grove at a very young 34.3 years (2 years younger than the Edmonton average).

**Table 3.3** reveals that over 34% of the Primary Trade Area's population is currently between the ages of 20 to 44 years. This age cohort represents not only the family building stage, but also the income earning stage. A strong and young family demographic profile is a critical prerequisite for many retailers looking at entering a market or establishing another location in an existing market. The young, family demographic presents a strong opportunity for Toys & Hobbies, which are under-represented in the City.

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

Additionally, this spending cohort is increasingly being drawn to on-line shopping either for direct sales or for research for physical store purchases. While the overall impact of on-line sales on bricks and mortar locations continues to be debated, the role of the internet is here to stay and thus retailers are learning to adapt.

While Century Crossing has been successful in positioning a project that can tap into this lucrative demographic segment, these consumers are also increasingly savvy and socially aware of the role that supporting local business has in fostering a sense of place and community.

A citywide retail study of this nature must realize the role that all retail formats play in the establishment and evolution of a complete community, which includes the importance of Spruce Grove's City Centre as the city works to grow and become a regional destination.

Consequently, some retail nodes will not compete, nor can they, with the above noted newer and larger comparison retail nodes, but rather a blend of local and branded shops and services could be very well positioned within closer proximity to peoples' primary residences and areas of employment, such as in the City Centre district.

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

Thus far in its growth as a city and regional market, Spruce Grove has been strong in consolidating and providing a range of shops and services that are most compatible and sought by the target demographic profiles, which would include full-service restaurants, conveniences and personal services.

However, as with any regional and growing market, the biggest challenge will now be in balancing the demand with growth so as to still be responsive to consumer demands, but also ensure the stability of existing businesses.

Although Spruce Grove is a strong regional market, for residents of Spruce Grove themselves, there is still a desire and propensity to drive into Edmonton for a wider array of comparison goods (also referred to as Department Store Type Merchandise). As the Consumer Survey revealed, West Edmonton Mall continues to be the most compelling destination, even for Spruce Grove residents.

Table 3.4

## PRIMARY TRADE AREA AVERAGE HOUSEHOLD INCOME BREAKDOWN

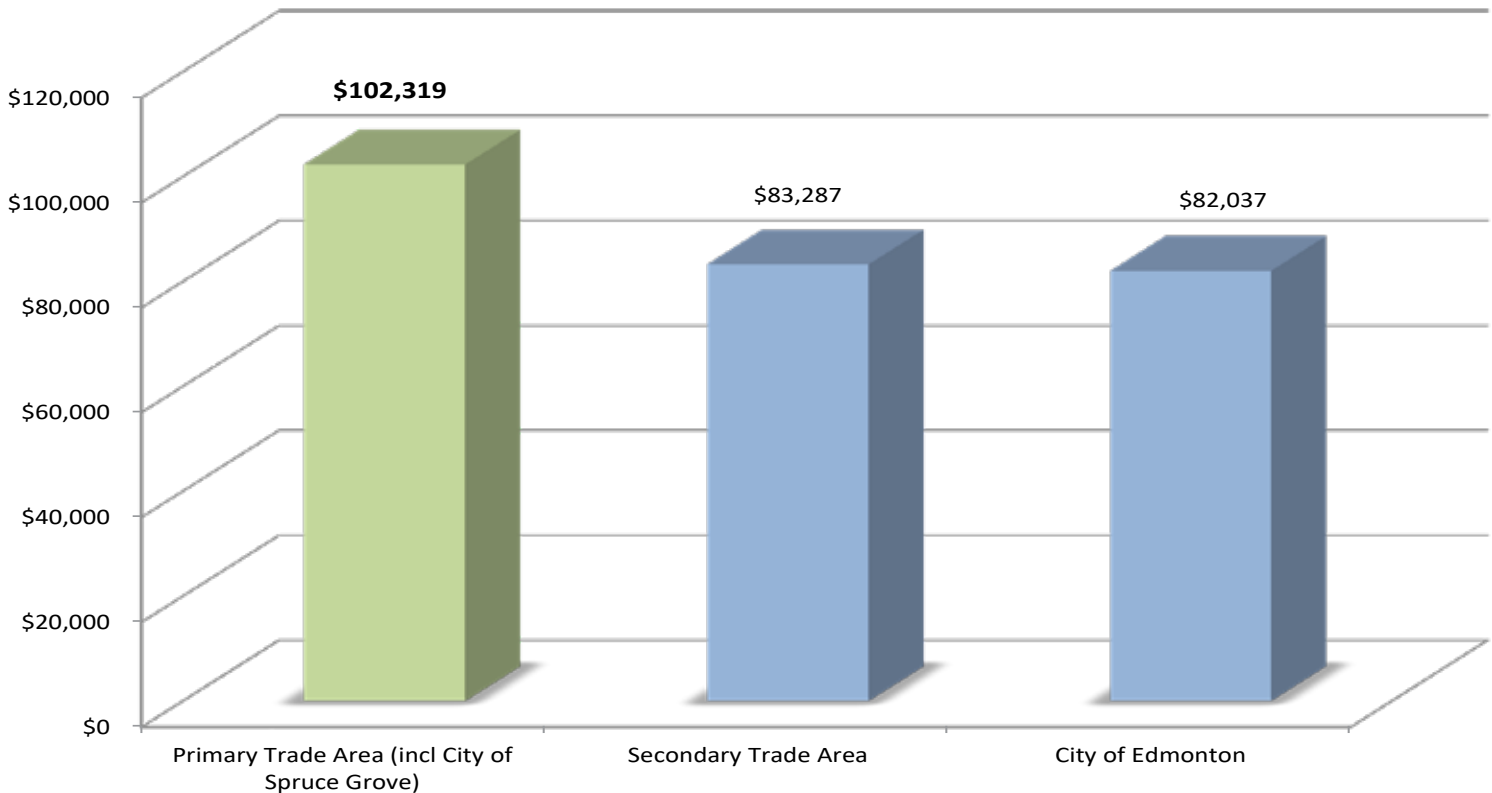
(Source: Sitewise Pro/Pitney Bowes 2017 and Cushing Terrell Architecture Inc)

2017 Estimates and Projections Income Trends	Primary Trade Area (Including City of SG)		Secondary Trade Area		Spruce Grove (City)		Edmonton (City)	
2017 Estimated Households by Income	35,541	% base	16,252	% base	12,397	% base	393,962	% base
Under \$5,000	256	1%	187	1%	68	1%	6,436	2%
\$5,000 to 9,999	379	1%	294	2%	92	1%	7,448	2%
\$10,000 to 14,999	559	2%	468	3%	131	1%	11,480	3%
\$15,000 to 19,999	794	2%	691	4%	187	2%	17,532	4%
\$20,000 to 29,999	1,290	4%	1,057	7%	337	3%	25,725	7%
\$30,000 - 39,999	1,534	4%	1,038	6%	471	4%	26,965	7%
\$40,000 - 49,999	1,876	5%	1,062	7%	664	5%	27,368	7%
\$50,000 to 59,999	2,090	6%	1,080	7%	793	6%	27,274	7%
\$60,000 - 79,999	3,773	11%	1,897	12%	1,426	12%	42,214	11%
\$80,000 - 99,999	4,748	13%	2,136	13%	1,885	15%	44,568	11%
\$100,000 - 124,999	5,074	14%	2,005	12%	2,075	17%	42,197	11%
\$125,000 - 149,999	4,342	12%	1,548	10%	1,658	13%	34,851	9%
\$150,000 - 174,999	3,163	9%	1,029	6%	1,066	9%	25,918	7%
\$175,000 - 199,999	2,131	6%	651	4%	626	5%	19,021	5%
\$200,000 - 249,999	1,415	4%	414	3%	359	3%	14,231	4%
\$250,000 and over	2,117	6%	694	4%	559	5%	20,734	5%
<b>Median Estimated Household Income</b>	<b>\$ 102,319</b>		<b>\$ 83,287</b>		<b>\$ 101,741</b>		<b>\$ 82,037</b>	

Figure 3.3

## RETAIL TRADE AREA AVERAGE HOUSEHOLD INCOME COMPARISON

(Source: Sitewise Pro/Pitney Bowes 2017 and Cushing Terrell Architecture Inc)



# 3

fact

51% of PTA households earn over \$100,000

(41% Edmonton Avg)

3.5

## 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 3.4 and Figure 3.3** reveals an average Household Income in 2017 estimated at over \$121,046 in the City of Spruce Grove, which is \$11,000 above with the City of Edmonton average (\$110,315). Similarly, the total PTA's average household income is at \$126,660.

Estimates for household income in the City of Spruce Grove forecast growth at an average annual rate of 2.9% per annum, over the 5-year period 2017 to 2022, whereby average household income could approach \$140,000.

**Table 3.4** reveals a trend in which over 52% of the households in the City earn over \$100,000, which is 11% higher than the Edmonton average.

The income profile illustrates a market that is well positioned to benefit from higher levels of discretionary spending on retail shops and services both in Spruce Grove and outside of the City.

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

3.6

## EDUCATION & TRADE CERTIFICATION

**Table 3.5** illustrates academic attainment of the Retail Trade Area population.

Approximately 65% of the City's residents (above the age of 15) have a Trade Certificate or higher including other forms of Post Secondary degrees or diplomas.

This is above the PTA average (excluding the City of Spruce Grove), which is 49%, and only marginally below the City of Edmonton average which is 66%. Of particular interest, given the City's industrial and more blue-collar market, is that *"apprenticeship or trades certificate or diploma"* have a representation of over 19% of the educational attainment in the City, which is 9% higher than the Edmonton average. This is likely to continue given the opening of the new NAIT campus in Spruce Grove.

Educational attainment thus represents a strong profile for the City of Spruce Grove.

3.7

## LABOUR FORCE & OCCUPATIONS

**Table 3.6** illustrates labour force composition of the Retail Trade Area residents as a further layer of the demographic composition. An analysis of labour force provides another level of insight into potential consumer behaviour and the relationship with potential tenants and merchandise categories.

Accordingly, **Table 3.6** reveals a pattern whereby almost 50% of the Primary Trade Area's employed labour force work in "Sales and Service" or "Trades, Transport & Equipment Operators".

Each of these segments suggest a more blue collar profile for the region conducive to value and mid price point retail, but also strong spending for restaurants and entertainment.

3.8

## RETAIL TRADE AREA SPENDING PROFILE

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

Table 3.5

## RETAIL TRADE AREA ACADEMIC ATTAINMENT & TRADE CERTIFICATIONS

(Source: Sitewise Pro/Pitney Bowes 2017 and Cushing Terrell Architecture Inc)

	Primary Trade Area (including City of SG)		Secondary Trade Area		Spruce Grove (City)		Edmonton (City)	
		%		%		%		%
<b>2017 Population 25 to 64 years by Educational Attainment</b>	<b>54,354</b>		<b>22,760</b>		<b>19,233</b>		<b>576,203</b>	
No certificate, diploma or degree	7,477	14%	4,183	18%	2,323	12%	61,350	11%
High school diploma or equivalent	13,987	26%	6,860	30%	4,658	24%	130,746	23%
Apprenticeship or trades certificate or diploma	10,338	19%	4,469	20%	3,563	19%	57,795	10%
College, CEGEP or other non university certificate or diploma	13,301	24%	5,021	22%	5,157	27%	122,738	21%
University certificate or diploma below bachelor level	1,318	2%	211	1%	512	3%	24,617	4%
Bachelor's degree	6,666	12%	1,798	8%	2,525	13%	120,324	21%
University certificate, diploma or degree above bachelor level	1,266	2%	219	1%	495	3%	58,633	10%

Table 3.6

## RETAIL TRADE AREA LABOUR FORCE & OCCUPATIONS

(Source: Sitewise Pro/Pitney Bowes 2017 and Cushing Terrell Architecture Inc)

2017 Estimates and Projections Labour Force by Occupation	Primary Trade Area (Including City of SG)		Secondary Trade Area		Spruce Grove (City)		Edmonton (City)	
		%		%		%		%
<b>2017 Population 15 years and over by Labour Force Activity</b>	<b>75,896</b>		<b>32,874</b>		<b>25,981</b>		<b>797,402</b>	
In the labour force	54,745	72%	23,371	71%	19,732	76%	580,442	73%
Not in the labour force	21,151	28%	9,503	29%	6,249	24%	216,960	27%
Participation Rate	72.1%		71.1%		75.9%		72.8%	
<b>2017 Labour Force by Occupation</b>	<b>54,745</b>		<b>23,371</b>		<b>19,732</b>		<b>580,442</b>	
Management	6,519	12%	3,027	13%	1,819	9%	50,395	9%
Business, finance & administrative	9,993	18%	3,890	17%	3,470	18%	106,264	18%
Natural & applied sciences	2,074	4%	502	2%	886	4%	42,122	7%
Health	1,902	3%	682	3%	840	4%	33,075	6%
Social science, education, government and religion	4,917	9%	1,109	5%	2,257	11%	62,470	11%
Art, culture, recreation and sport	152	0%	1	0%	127	1%	4,762	1%
Sales and service	11,127	20%	5,059	22%	4,203	21%	154,841	27%
Trades, transport and equipment operators and related	16,207	30%	7,081	30%	5,498	28%	117,274	20%
Primary industry-specific	917	2%	1,306	6%	419	2%	1,713	0%
Processing, manufacturing and utilities	741	1%	702	3%	213	1%	6,219	1%
Occupation - Not applicable	196	0%	12	0%	0	0%	1,307	0%

# 3

fact

46% of City Residents have a Trade Certificate or College diploma

(31% Edmonton Avg)

The key questions it seeks to answer are:

- How much do Retail Trade Area residents spend on Convenience retail (such as Grocery and Pharmacy), on Comparison retail <sup>1</sup> (such as Fashion and Home Furnishings), and Leisure (Food & Beverage and Entertainment)?
- What spending patterns or trends does the Retail Trade Area expenditure profile demonstrate? And how is spending forecast to change over the coming years?
- What types of retail goods and services are garnering inflow of sales dollars and which categories are exhibiting outflow of sales (or leakage).

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

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

The initial task involved developing an understanding of how each of the delineated Retail Trade Area residents spend their shopping and leisure dollars on a per capita basis for each of 18 merchandise categories.

Once this Retail Trade Area shopping “profile” was established, the data was aggregated by population to quantify the size of the Retail Trade Area market.

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

As illustrated in **Table 3.7**, the Retail Trade Area spending potential for the City of Spruce Grove is estimated at \$1.9 billion. (*Note: Retail spending potential is the total amount of spending by residents within AND outside of the delineated Retail Trade Area*).

Validation of Spruce Grove’s regional market penetration lies in the fact that 71% of the total Retail Trade Area spending originates from the PTA, although only 38% of that total comes from Spruce Grove residents themselves. This illustrates a strong pattern of inflow from the western areas of the PTA and the STA.

Spending on Comparison Merchandise by Retail 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.

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

The Top 5 retail spending categories for the Retail Trade Area (PTA + STA) are:

1. Grocery & Specialty Foods - \$411 Million
2. Auto/RV/Motorsport - \$397 Million
3. Clothing, Apparel & Footwear - \$175 Million
4. Home Electronics & Appliances - \$121 Million
5. Restaurants (full & limited) - \$112 Million

<sup>1</sup> 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 3.7

## RETAIL TRADE AREA SPENDING

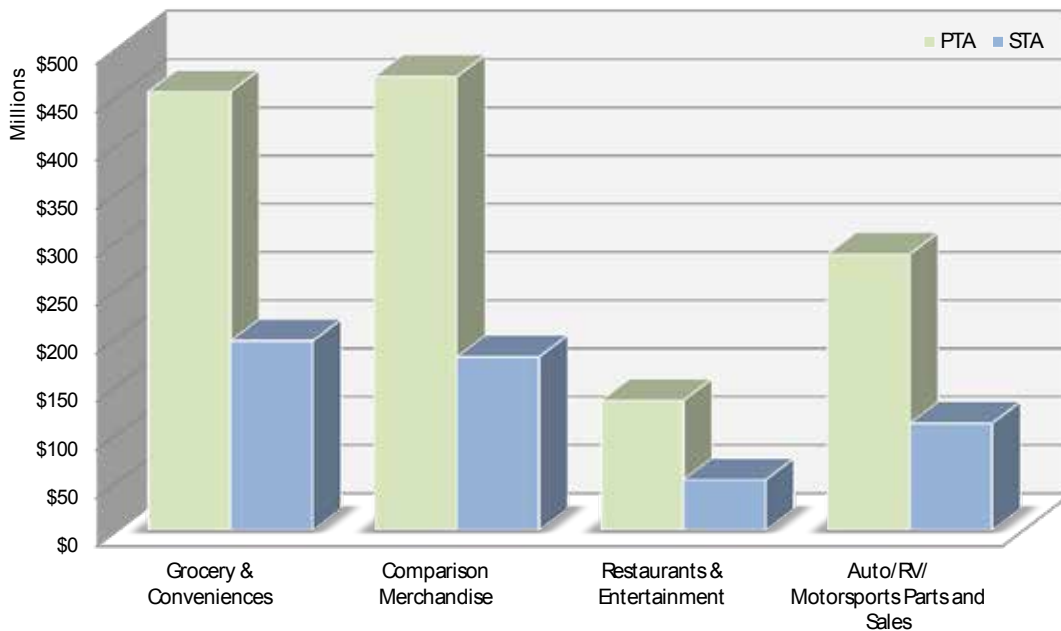
(Source: Sitewise Pro/Pitney Bowes 2017 and Cushing Terrell Architecture Inc)

Retail Spending by Merchandise Category	2017			
	City of Spruce Grove Aggregate Retail Spending	PTA Including City of Spruce Grove Aggregate Retail Spending	STA Aggregate Retail Spending	RETAIL Trade Area Aggregate Retail Spending
Grocery & Specialty Foods	\$103,282,990	\$287,917,641	\$123,742,728	\$411,660,369
Pharmacy	\$10,766,298	\$33,017,589	\$16,235,748	\$49,253,337
Alcohol & Tobacco	\$27,523,292	\$72,574,722	\$32,081,448	\$104,656,170
Personal Services	\$23,934,526	\$61,379,307	\$24,540,520	\$85,919,827
Clothing & Apparel	\$40,536,101	\$102,606,867	\$39,947,416	\$142,554,283
Footwear	\$9,042,560	\$23,172,732	\$9,344,900	\$32,517,632
Jewelry & Accessories	\$7,912,240	\$17,521,713	\$5,931,980	\$23,453,693
Health & Beauty	\$10,356,557	\$26,833,455	\$11,148,872	\$37,982,327
Home Furnishings & Accessories	\$41,638,163	\$85,156,236	\$27,335,864	\$112,492,100
Home Electronics & Appliances	\$35,845,273	\$87,359,778	\$34,080,444	\$121,440,222
Home Improvement & Gardening	\$11,571,651	\$36,536,148	\$15,309,384	\$51,845,532
Books & Multimedia	\$7,827,466	\$20,436,075	\$8,044,740	\$28,480,815
Sporting Goods & Recreation	\$7,050,371	\$16,881,975	\$6,435,792	\$23,317,767
Toys & Hobbies	\$5,580,955	\$14,074,236	\$5,801,964	\$19,876,200
Miscellaneous Specialty	\$15,386,481	\$40,196,871	\$16,707,056	\$56,903,927
Full-Service F&B	\$18,176,111	\$46,360,391	\$18,597,814	\$64,958,205
Limited Service F&B	\$13,162,011	\$33,571,318	\$13,467,382	\$47,038,700
Entertainment & Leisure	\$23,228,076	\$54,839,763	\$20,672,544	\$75,512,307
Auto Parts & Accessories	\$7,827,466	\$24,381,126	\$11,262,636	\$35,643,762
Auto/RV/Motorsports Dealership	\$97,405,326	\$262,079,334	\$99,901,044	\$361,980,378
<b>TOTAL RETAIL CATEGORIES ONLY</b>	<b>\$518,053,914</b>	<b>\$1,346,897,277</b>	<b>\$540,590,276</b>	<b>\$1,887,487,553</b>

Figure 3.4

## RETAIL TRADE AREA SPENDING SUMMARY 2017

(Source: Sitewise Pro/Pitney Bowes 2017 and Cushing Terrell Architecture Inc)





# 3

fact

\$1.9 billion

Retail Trade Area Spending in 2017

Another noteworthy category of spending, which ranks only marginally behind Full-Service Restaurants is Home Furnishings (\$112 Million) and Entertainment/Leisure (\$75 Million).

**Figure 3.5** illustrates the total size of the retail market “pie” attributable to the identified Trade Areas, whereby it reveals that 71% of the total available retail trade area spending is in the PTA or \$1.35 billion.

3.9

## SUMMARY & IMPLICATIONS

Spruce Grove’s Retail Trade Area reflects a strong pattern of regional market penetration wherein the majority of customers are likely to come from communities west of Spruce Grove.

The Retail Trade Area for the City of Spruce Grove is a reflection of the strategic location of the City as an interceptor to consumers coming from the west.

The Retail Trade Area Demographic Profile illustrates a growing regional market of 138,000 residents and conservatively forecast to surpass 164,000 by 2027.

Spruce Grove’s Retail Trade Area is characterized by a young, aspirational family-oriented demographic with a commensurate high average household income profile. The Retail Trade Area profile is highly mobile in their shopping patterns, yet they are increasingly seeking opportunities to spend their money closer to home for more frequent purchases.

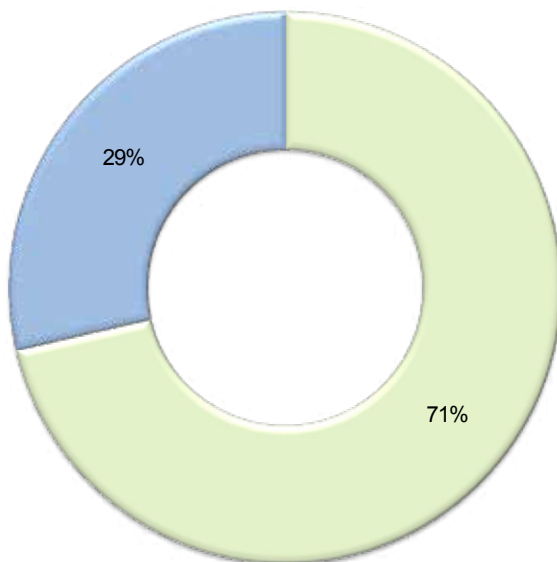
Overall, Spruce Grove represents a \$1.9 Billion retail market in which categories such as Grocery, Automotive/RV and Restaurants, Clothing/Apparel & Footwear and Home Furnishings represent growing and significant spending segments.

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

Figure 3.5

## RETAIL TRADE AREA SPENDING SUMMARY

(Source: Sitewise Pro/Pitney Bowes 2017 and Cushing Terrell Architecture Inc)



■ PTA (including City of Spruce Grove) ■ STA



*Photos Courtesy of City of Spruce Grove, 2017*

# 4 RETAIL SUPPLY

## 4.1

### INTRODUCTION

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

This section will provide a detailed picture of the overall citywide retail inventory comprising a detailed inventory of the retail centres/nodes and tenants therein that make up the City of Spruce Grove's retail market.

To further assess the level of retail supply, a comprehensive inventory and evaluation was conducted of the existing City of Spruce Grove's retail inventory with respect to locations, format and amount of space (Refer to Appendix A for detailed inventory listing). This evaluation creates a foundation upon which retail "gaps" can be quantified and determined.

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

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

A review of Spruce Grove's retail landscape reveals that there are nine (9) distinct retail nodes (including Westwind) as shown in **Figure 4.2**, which can be distinguished according to location, quality of infrastructure, format and mix of retail (i.e. ratio of local to national).

Spruce Grove's retail landscape remains highly fragmented, partly due to the aging infrastructure in the City Centre and poor connectivity across Highway 16A. New developments are occurring on the west and east sides of the city drawing more business and focus away from aging infrastructure and local businesses in and around the City Centre, which may be further observed upon the future introduction of the Westwind Centre in the northeast.

The identified retail nodes from this section will be used in subsequent sections in order to analyze and better understand the overall retail inventory, mix of merchandise categories, quality and performance of the retail infrastructure present in specific areas of Spruce Grove.

## 4.2

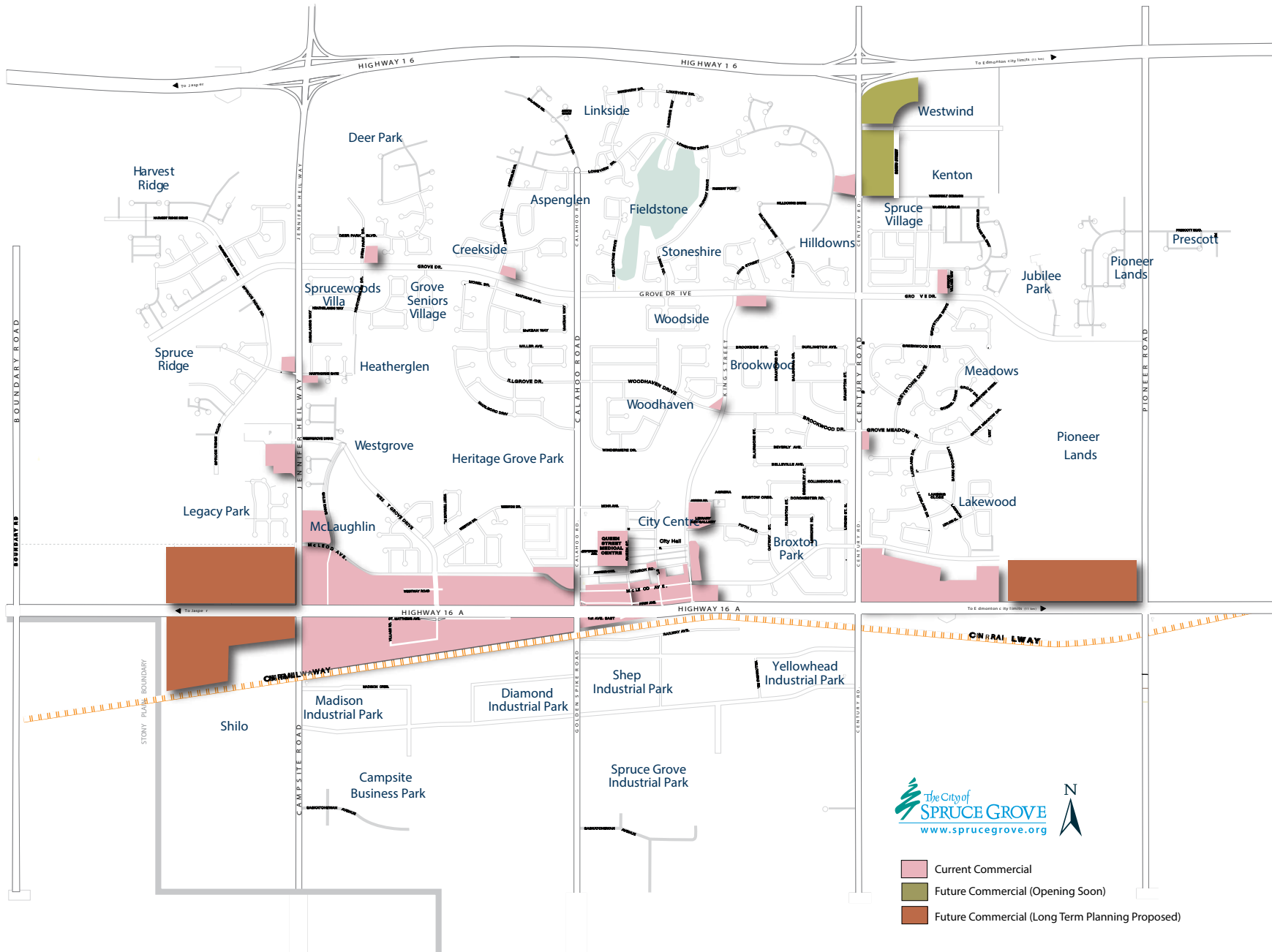
### RETAIL MARKET CONTEXT

Spruce Grove has a citywide vacancy of approximately 2.4%, which is illustrative of a very healthy retail environment. This vacancy level represents a 2% decrease from estimates in 2015, further suggesting that demand is strong and quality space is scarce, with the exception of the pending development at Westwind).

Asking lease rates continue to be in the range of \$20 - \$30 per sf, which is favourable compared to larger regional retail destinations in West Edmonton, Southwest or South Edmonton. Typical operating costs range from \$6 to \$8 psf for older retail spaces, \$8 to \$10 psf for community-scale strip retail centres and \$10 to \$12 psf for larger power centre retail nodes.

Lease rates for the newer projects such as Century Crossing or Westgrove Common are garnering at the higher end of the retail spectrum (\$25 - \$35 psf), while projects such as King Street Plaza are more middle of the road (\$18 psf) and in the City Centre area rents are at the lower end of the lease rate spectrum at \$12 to \$15 psf.

Figure 4.1  
CITY OF SPRUCE GROVE COMMERCIAL LAND USE AREAS



# 4

Older, multi-purpose spaces are available at rates closer to \$10/sf.

The Triton Building and McQueen Building (Wilhawk Beef Jerky) on McLeod Avenue are among the newer buildings in the City Centre with retail at-grade and office above. These projects are seeking \$20 to \$25 psf for available retail spaces. A Salon and Menswear store currently occupy space at the Triton Building with only approximately 1,700 sf vacant, while the smaller McQueen Building has leased its retail space.

While it is important to recognize that location and surrounding context are very important features when leasing, at present the City Centre does not have the foot traffic and thus is not seen to be as attractive a location as others, particularly the Power Centre area. However, the City Centre area's appeal lies with creating opportunities to incubate and support local retailers for whom the larger more expensive developments may not create viable business plans.

Spruce Grove & Stony Plain continue to be among the faster growing areas in the Edmonton Census Metropolitan Area (CMA), and this growth rate has attracted the attention of a number of retail tenants (independent and chain stores). Recent and current development projects such as Westwind, Karo and Century have addressed recent concerns with providing higher quality spaces for new-to-market tenants. To balance this, the future City Centre Area Redevelopment Plan will strive to provide compatible price points and spaces for local tenants to acquire quality retail tenancies.

## 4.3

### RETAIL NODE PROFILES

**Figures 4.1 & 4.2** highlight the major retail nodes and projects in the City of Spruce Grove.

This diagrammatic profile also includes areas of future development.

**Figures 4.1 & 4.2** clearly illustrates the concentrations of retail activity along Highways 16A, which are highlighted by Power Centres such as Century Crossing, Westland Market/Canadian Tire, Westgrove Common/Real Canadian Superstore and WalMart/Sunrise Town Centre.

The following provides brief summaries on the current retail nodes in the City of Spruce Grove.

#### **CENTURY CROSSING NODE**

Retail Inventory: 282,000 sf (~300,000 sf buildout)

Retail Vacancy: 0.3% (thus essentially ZERO)

Retail Lease Range: \$30 to \$45 psf/yr

Occupancy Costs Range: \$8 - \$10 psf/yr

Number of Retail Businesses: 45

Average Business Size: 6,266 sf

Distribution of Retail Space: 100% Class A

Top 3 Merchandise Categories by Floor Area:

1. Grocery & Specialty Foods - 45,000 sf
2. Specialty Retail - 34,000 sf
3. Full & Limited Service Restaurants - 33,000 sf

Office Inventory: 6,272 sf

Office Vacancy: 0%

Number of Office Businesses: 2

Top Office Category by Floor Area:

1. Medical Services - 6,272 sf

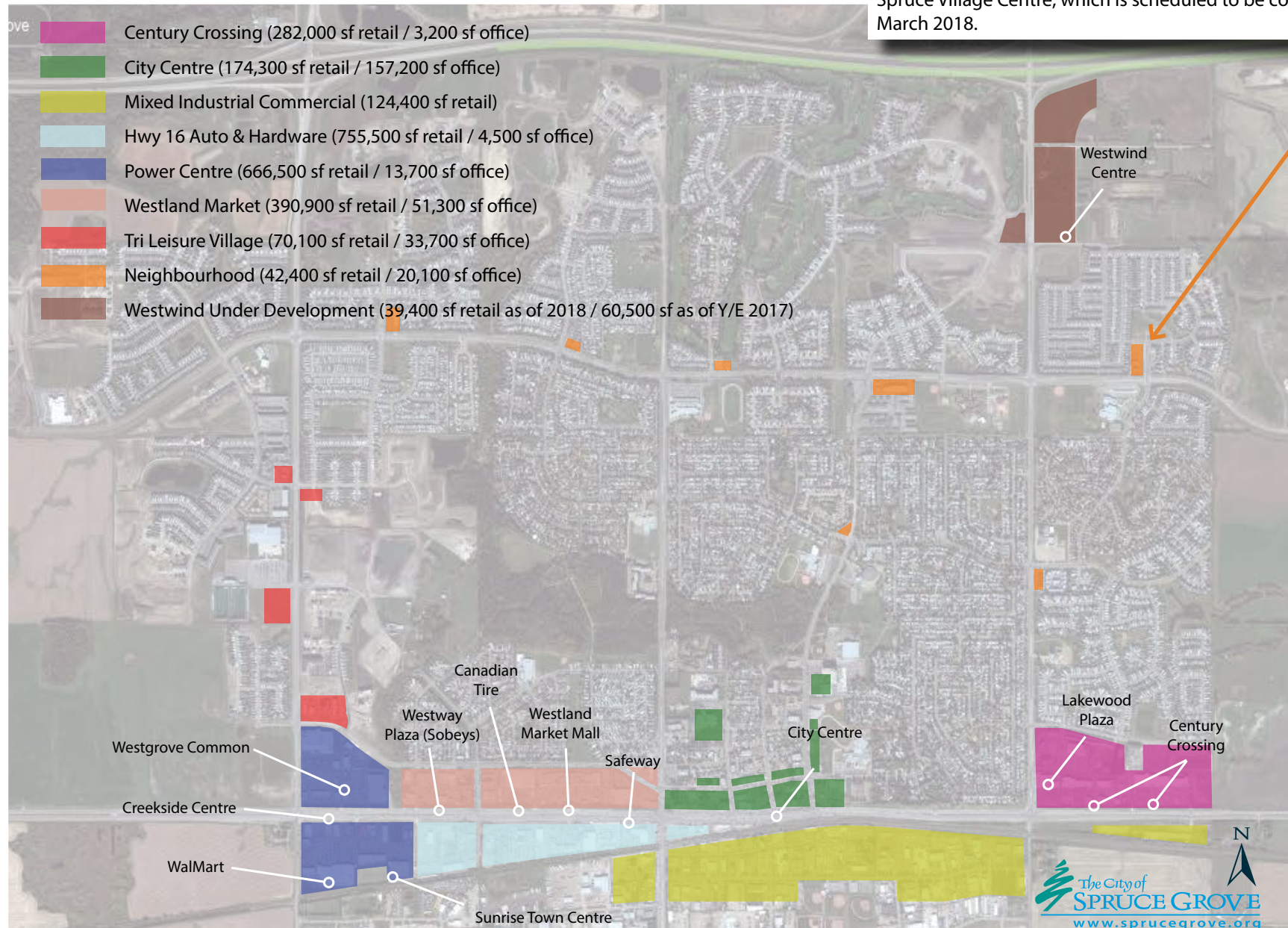
With current anchor tenants including Save On Foods, Sport Chek, Winners, PetSmart, Landmark Theatres, Peavey Mart, Michael's and State & Main as well as major Financial Institutions Servus and ATB, Century Crossing is fulfilling consumers' desires and needs for missing or under served merchandise categories and continues to change regional shopping patterns to the benefit of Spruce Grove.

Figure 4.2

## CITY OF SPRUCE GROVE RETAIL NODES/DISTRICTS

(Source: City of Spruce Grove, Cushing Terrell Architecture Inc 2017)

**Note:** The retail and office inventory figures in the Neighbourhood Nodes does not include the approximate 8,000 sf of ground floor retail and 10,000 sq. ft. of second level office space under construction as of December 2017 at the Spruce Village Centre, which is scheduled to be completed in March 2018.



# 4

## **CITY CENTRE NODE**

Retail Inventory: 175,000 sf  
Retail Vacancy: 14,700 sf (8.4%)  
Retail Lease Range: Old \$12 - \$15 psf/yr,  
New \$20 - \$24 psf/yr  
Occupancy Costs Range: \$6 - \$9 psf/yr  
Number of Retail Businesses: 110  
Average Business Size: 1,591 sf  
Distribution of Retail Space: 70% Class C  
Top 3 Merchandise Categories by Floor Area:  
1. Personal Services - 30,500 sf  
2. Full & Limited Service Restaurants - 19,100 sf  
3. Alcohol & Tobacco - 14,250 sf

Office Inventory: 157,000 sf  
Office Vacancy: 13,905 sf (8.9%)  
Number of Office Businesses: 102  
Top Office Category by Floor Area:  
1. Medical Services - 71,500 sf  
2. Finance/Insurance/Real Estate - 27,000 sf  
3. Professional Services - 22,500 sf

The City Centre is a dispersed node comprised of street-oriented retail, office and residential uses. One- and two-storey street fronted buildings contribute to a traditional retail environment, though external development continues to put pressure on the area as a retail node.

The City Centre, as with many others across the region, province and country is susceptible to external pressures for retail growth and therefore it will be important as the city grows to identify target tenants and redevelopment opportunities that can help to stimulate retail back in the core.

## **MIXED-INDUSTRIAL COMMERCIAL NODE**

Retail Inventory: 124,000 sf  
Retail Vacancy: 0%  
Retail Lease Range: \$10 - \$20 psf/yr  
Occupancy Costs Range: \$6 - \$8 psf/yr  
Number of Retail Businesses: 20

Average Business Size: 6,218 sf  
Distribution of Retail Space: 95% Class C  
Top 3 Merchandise Categories by Floor Area:  
1. Home Improvement & Garden - 55,000 sf  
2. Auto Parts & Accessories - 36,800 sf  
3. Entertainment & Leisure - 10,000 sf

## **HWY 16 AUTO & HARDWARE NODE**

Retail Inventory: 755,500 sf  
Retail Vacancy: 100,000 sf (13.2%)  
Retail Lease Range: \$10 - \$25 psf/yr  
Occupancy Costs Range: \$6 - \$8 psf/yr  
Number of Retail Businesses: 25  
Average Business Size: 30,200 sf  
Distribution of Retail Space: 74% Class A  
Top 3 Merchandise Categories by Floor Area:  
1. Auto/RV/Motorsports Dealership - 590,000 sf  
2. Full & Limited Service Restaurants - 21,500 sf  
3. Auto Parts & Accessories - 15,000 sf

Office Inventory: 4,500 sf  
Office Vacancy: 0%  
Number of Office Businesses: 3

## **POWER CENTRE NODE**

Retail Inventory: 666,900 sf  
Major Anchors: Real Canadian Superstore, Home Depot, WalMart, Rona  
Retail Vacancy: 10,132 sf (1.5%)  
Retail Lease Range: \$25 - \$40 psf/yr  
Occupancy Costs Range: \$7 - \$10 psf/yr  
Number of Retail Businesses: 77  
Average Business Size: 8,661 sf  
Distribution of Retail Space: 96% Class A  
Top 3 Merchandise Categories by Floor Area:  
1. Home Improvement & Garden - 250,500 sf  
2. Clothing & Apparel - 97,786 sf  
3. Grocery & Specialty Foods - 81,500 sf

Office Inventory: 13,700 sf  
Office Vacancy: 0%

Table 4.1

**CITY OF SPRUCE GROVE RETAIL INVENTORY & COMPARISON BETWEEN 2017 AND 2015**

(Source: Cushing Terrell Architecture Inc 2017)

		Identified Retail Node	Total Inventory (SF)	Number of Stores	Average Store Size (SF)
2017 Inventory	City Centre		174,350	110	1,585
	Power Centre Retail		666,452	77	8,655
	Hwy 16 Auto & Hardware		755,500	25	30,220
	Neighbourhood Convenience		42,376	20	2,119
	Westland Market		390,935	75	5,212
	Century Crossing		281,991	45	6,266
	Mixed Industrial Commercial		124,359	20	6,218
	Tri Leisure Village Area		70,144	19	3,692
	Westwind		39,140	14	2,796
	<b>TOTAL</b>		<b>2,545,247</b>	<b>405</b>	<b>6,285</b>
		Identified Retail Node	Total Inventory (SF)	Number of Stores	Average Store Size (SF)
2015 Inventory	Downtown Area		190,730	107	1,783
	Power Centre Retail		657,778	63	10,441
	Hwy 16 Auto & Hardware		621,160	24	25,882
	Neighbourhood Convenience		41,973	21	1,999
	Westland Market		372,175	76	4,897
	Century Crossing		286,092	48	5,960
	Mixed Industrial Commercial		120,359	19	6,335
	Tri Leisure Village Area		53,184	25	2,127
	<b>TOTAL</b>		<b>2,343,451</b>	<b>383</b>	<b>6,119</b>

Some differences in the inventory figures 2015 to 2017 are a result of updated site plans and measurement estimates taken during on-the-ground fieldwork as well as the removal of some spaces from retail inventory to other non-retail uses.



Photo Courtesy of City of Spruce Grove, 2017



# 4

fact

2.55 million sf

City of Spruce Grove's Retail Inventory

Number of Office Businesses: 10  
Top Office Category by Floor Area:  
1. Medical Services - 10,700 sf

The Power Centre node includes Westgrove Common, Creekside Centre, WalMart, Sunrise Town Centre and Rona and freestanding pads.

The primary competitive cluster for regional residents (Spruce Grove, Stony Plain and Parkland County) is currently along Hwy 16A. This area includes major large format tenants such as WalMart, Real Canadian Superstore, Rona, Home Hardware, Canadian Tire and Home Depot. There are only however a limited number of mid-sized or "junior box" formats, (Staples, Marks, and Shoppers Drug Mart). The most significant void along the entire Hwy 16A corridor are casual sit-down restaurant establishments.

In addition to the tenant composition along the corridor, there are a limited number of sites prepared and capable of accommodating many of the large or mid-sized box formats that are absent in the market (other than Century Crossing). However, future development at Westwind as well as the proposed Pioneer Point retail node (east of Century Crossing), will both fill this critical market void/niche over the next 10 years.

The primary competitive influence of the projects along Hwy 16A is that they include most of the largest "big box" national retail chains currently operating in the province.

This does limit the pool of available anchor and mini-anchor tenants available for the City of Spruce Grove. However, many of these centres are dated and obsolete, and it is likely that given suitable terms, a number of tenants within the market or those actively looking at the market may prefer to relocate to (or expand to) a higher quality format with excellent highway visibility and accessibility, particularly one located adjacent to emerging residential development.

## **WESTLAND MARKET NODE**

Retail Inventory: 391,000 sf  
Retail Vacancy: 12,323 sf (3.2%)  
Retail Lease Range: \$20 - \$35 psf/yr  
Occupancy Costs Range: \$8 - \$12 psf/yr  
Number of Retail Businesses: 75  
Average Business Size: 5,212 sf  
Distribution of Retail Space: 61% Class B  
Top Merchandise Categories by Floor Area:  
1. Grocery & Specialty Food - 85,400 sf  
2. Clothing & Apparel - 45,900 sf  
3. Auto Parts & Accessories - 44,000 sf  
4. Specialty Retail- 42,500 sf

Office Inventory: 51,300 sf  
Office Vacancy: 10,423 sf (20.3%)  
Number of Office Businesses: 32  
Top Office Category by Floor Area:  
1. Medical Services - 20,100 sf

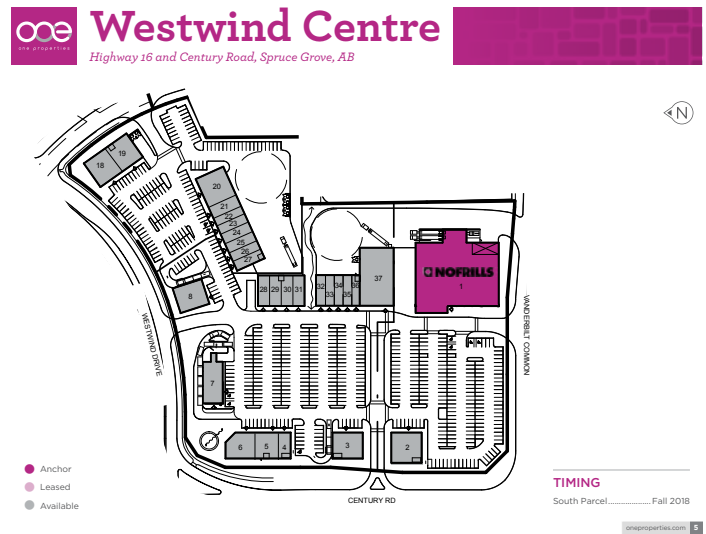
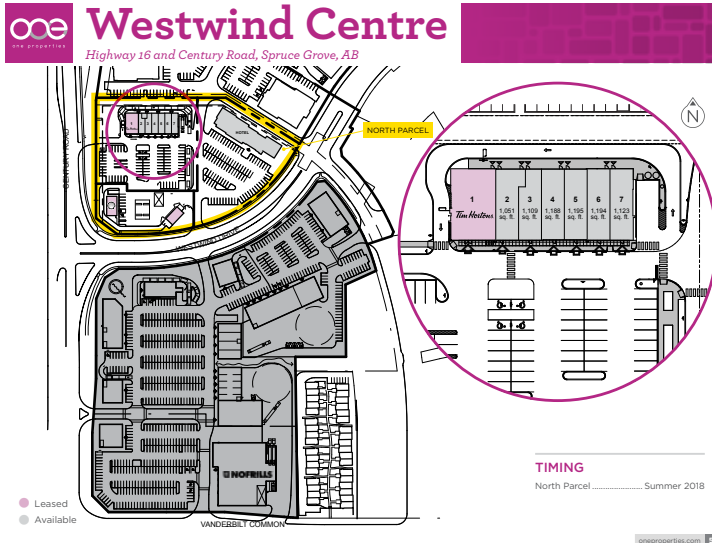
The Westland Market node includes Westland Market Mall, Canadian Tire, Safeway as well smaller strip centres including Centre 16, Cumbria Centre, Goodwill Plaza, Karo Centre, Karo Southwork (new), McLeod Centre, Sears Plaza, Sprucewood Plaza and Westway Plaza (Sobeys), as well as freestanding pads therein.

## **TRI-LEISURE VILLAGE NODE**

Retail Inventory: 70,100 sf  
Retail Vacancy: 8,261 sf (this includes space currently under construction. Upon completion, it is assumed vacancy will be <1%.)  
Retail Lease Range: \$20 - \$30 psf/yr  
Occupancy Costs Range: \$6 - \$8 psf/yr  
Number of Retail Businesses: 19  
Average Business Size: 3,692 sf  
Distribution of Retail Space: 84% Class A  
Top Merchandise Categories by Floor Area:  
1. Full & Limited Service Restaurant - 26,000 sf  
2. Alcohol & Tobacco - 9,300 sf  
3. Personal Services - 7,700 sf

Figure 4.3  
**CITY OF SPRUCE GROVE MAJOR RETAIL DEVELOPMENTS**  
 (Under Construction and Proposed)

## Westwind



## Pioneer Point

**AVISON YOUNG**

**PIONEER POINT**

**RETAIL FOR LEASE**

McLeod Avenue  
 Highway 16A  
 Pioneer Road

**PIONEER POINT**  
 NW CORNER OF HIGHWAY 16A & PIONEER ROAD  
 SPRUCE GROVE, AB

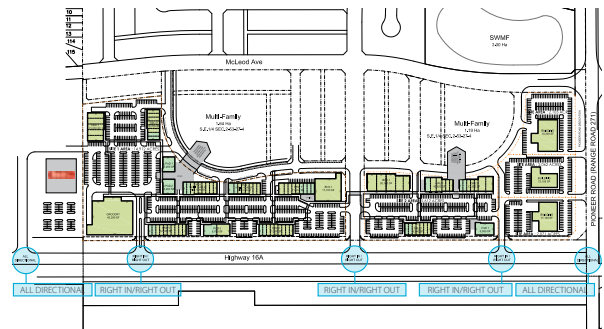
Partnership. Performance.

## Pioneer Point

### SITE DETAILS

- Prominent 27 acre retail Power Centre, located along Highway 16A in Spruce Grove, AB.
- This site is adjacent to existing commercial, and will be the 'first stop' to traffic entering Spruce Grove from Edmonton.
- Pioneer Point will have access via an all-directional intersection at Pioneer Road and various other points along Highway 16A.
- Located immediately east of existing retailers including Save-On Foods, Shoppers Drug Mart, Winners, Sport Chek, Michaels and many others.
- Outstanding exposure along Highway 16A, with unparalleled frontage to over 28,630 vehicles per day (2014).
- Various box and pad opportunities available in 2018/2019.

SPRUCE GROVE RETAIL DEVELOPMENT	
<b>SITE AREA</b>	
Site 1 = 440,603 s.f. (10.012 acres)	
Site 2 = 244,459 s.f. (5.512 acres)	
Site 3 = 476,696 s.f. (10.888 acres)	
Site 4 = 499,830 s.f. (11.462 acres)	
Site 5 = 456,312 s.f. (10.404 acres)	
<b>TOTAL SITE AREA = 2,117,900 s.f. (48.274 acres)</b>	
<b>Proposed Zoning: C-2</b>	
<b>BUILDING AREA, SITE &amp; ZONE</b>	
Total Building Area:	210,380 s.f.
Total Gross Floor Area:	238,450 s.f.
Site Coverage:	24.7%
Site Density:	26.67%
<b>LAND USE</b>	
RETAIL AREA:	173,363 s.f.
RESTAURANT (75% of tenant mix):	48,827 s.f.
OFFICE AREA:	87,190 s.f.
<b>PARKING</b>	
Total Parking Required:	1,052 stalls
Total Parking Provided:	1,018 stalls
Parking Ratio:	4.37 stalls/1,000 s.f.



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# 4

Office Inventory: 33,670 sf  
 Office Vacancy: n/a as project is actively leasing.  
 Number of Office Businesses: 5 (as of Nov 2017, but this figure is expected to increase over the next 6 months with active discussions currently underway for medical businesses)

## NEIGHBOURHOOD NODE(S)

Retail Inventory: 42,400 sf (excludes ~10,000 sf retail at Spruce Village Centre under construction as no tenants identified)  
 Retail Vacancy: 3,976 sf (9.4%)  
 Retail Lease Range: \$25 - \$40 for newly constructed spaces (e.g. \$28 psf for Spruce Village Centre under construction) and \$10 - \$20 psf/yr (older spaces in older neighbourhoods in the City)  
 Occupancy Costs Range: \$6 - \$8 psf/yr (\$9 psf at 2-storey Spruce Village Centre under construction)  
 Number of Retail Businesses: 20  
 Average Business Size: 2,119 sf  
 Distribution of Retail Space: 82% Class B  
 Top 3 Merchandise Categories by Floor Area:  
 1. Entertainment & Leisure - 14,500 sf  
 2. Grocery & Specialty Foods - 11,500 sf  
 3. Alcohol & Tobacco - 4,000 sf

Office Inventory: 20,100 sf  
 Office Vacancy: 1,884 sf (0.9%)  
 Number of Office Businesses: 14  
 Top Office Category by Floor Area:  
 1. Childcare - 8,000 sf

## WESTWIND (actively leasing and under construction)

Retail Inventory: 39,100 sf  
 Retail Vacancy: n/a - projects under construction  
 Retail Lease Range: n/a  
 Occupancy Costs Range: n/a  
 Number of Retail Businesses: n/a  
 Average Business Size: 1,999 sf  
 Distribution of Retail Space: 57% Class B

Top 3 Merchandise Categories by Floor Area:  
 1. Entertainment & Leisure - 24,000 sf  
 (assumes 2018 opening of No-Frills Supermarket)  
 2. Full & Limited Service Restaurants - 3,260 sf  
 3. Alcohol & Tobacco - 2,500 sf  
 Office Inventory: 60,500 sf  
 Office Vacancy: n/a - project is under construction

## 4.4

## FUTURE RETAIL DEVELOPMENTS

Figure 4.3 and Table 4.2 outline the site plans and proposed development formats respectively of the major retail developments currently under construction or proposed in the near term in the City of Spruce Grove.

### Westwind Centre

Located at the southeast corner of Hwy 16 and Century Road, Westwind Centre is a phased commercial development, the first phase of which will partially open by year end 2017. A No Frills supermarket and supporting retail is slated to begin construction and open in 2018, while 2 new office buildings under construction will also open in 2018.

Table 4.2

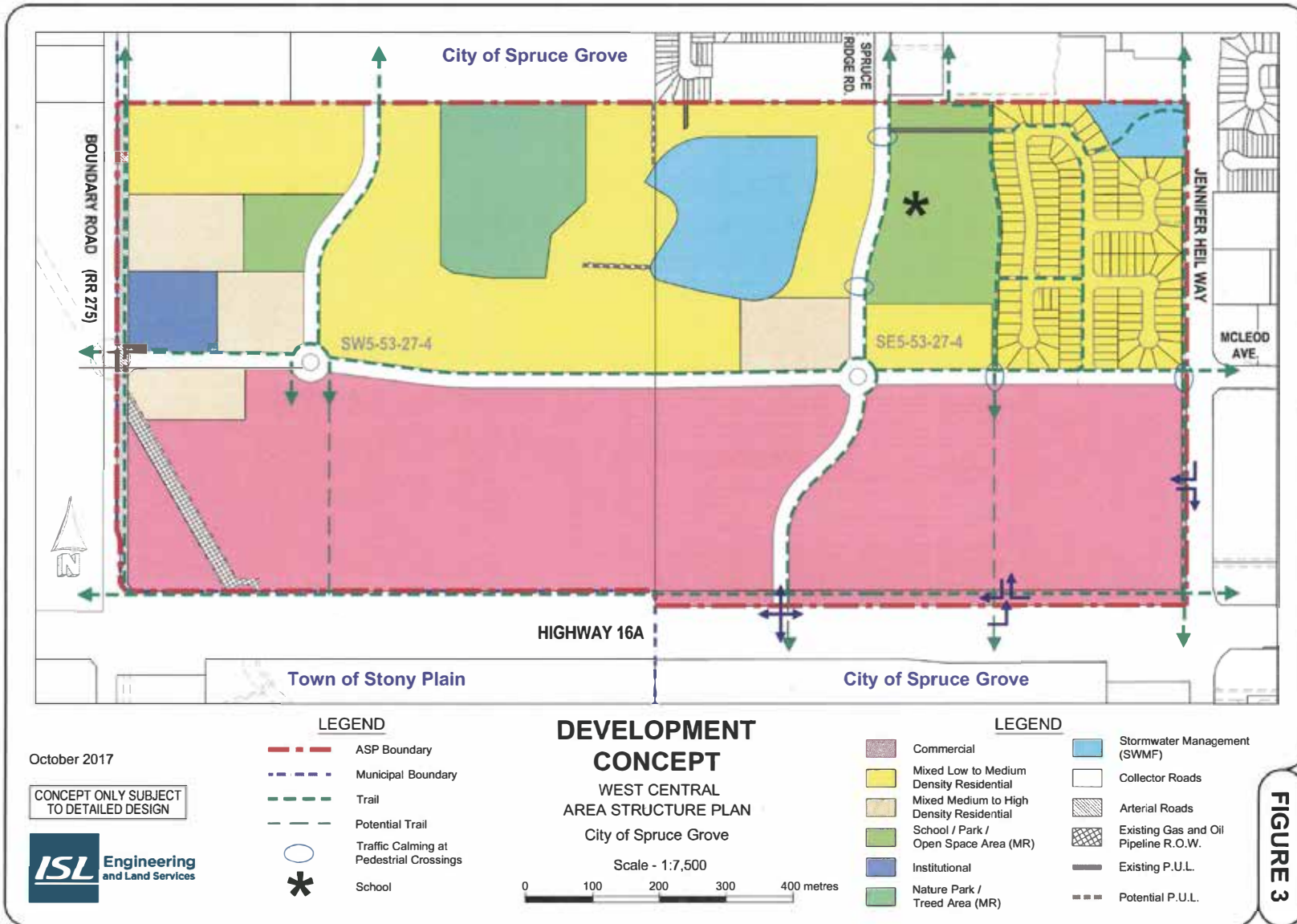
## FUTURE RETAIL DEVELOPMENTS

(Source: Cushing Terrell Architecture Inc and various Real Estate Brokerage Firms)

Projects Under Construction or Proposed	Forecasted Buildout	Currently Developed (as of Dec 2017)	Estimated Buildout Timing
Westwind Centre Phase 1	11,960 sf	11,960 sf	2018 - 2019
Westwind Centre Phase 2	158,000 sf	0 sf	2018 - 2021
Pioneer Point	238,490 sf	sf	2019 - 2025
<b>TOTAL</b>	<b>408,450 sf</b>	<b>11,960 sf</b>	

Commercial Listings, Owner Profiles & Cushing Terrell Fieldwork, 2017.

Figure 4.4  
**CITY OF SPRUCE GROVE WEST CENTRAL AREA PLAN - DEVELOPMENT CONCEPT**  
 (ISL Engineering, 2017)



# 4

These lands also may be the home of a future potential new arena and events centre facility, though at the time of writing this continues to be subject to further political discussion.

## ***Pioneer Point***

Immediately east of Century Crossing is a new community-scale retail centre proposed for 2019/2020 which could total an estimated 240,000 sq. ft.

To further assess the level of retail supply however, a comprehensive inventory and evaluation was conducted of the existing City of Spruce Grove retail inventory, with respect to locations, format and amount of space. This evaluation creates a foundation upon which retail “gaps” can be quantified and determined.

## ***West Central Area Structure Plan***

As documented in the West Central Area Plan document, prepared in 2016 by ISL Engineering and adopted by the City, “The primary objective of this ASP is to create a framework to accommodate residential, commercial, retail, institutional and open space development. The lands in the ASP will continue to meet the City’s and region’s long term needs in this regard.”

The development concept for the Plan area is shown in **Figure 4.4**. The concept provides a supply of lands for retail and commercial use located adjacent to Highway 16A. Through specific provisions of the City’s Land Use Bylaw and through developer administered architectural guidelines, an attractive development aesthetic will be achieved for the future commercial areas. The balance of the lands will be developed for residential, institutional, and park use.

Commercial development is planned for the southern portion of the Plan area, along Highway 16A to allow for the effective capture of local and regional retail markets.

Lands encompassing 48.25 ha are intended to serve vehicular traffic adjacent to arterial roadways and highways, and development will be oriented to Highway 16A. Development will accommodate such highway commercial uses as identified in the City’s (2012) Land Use Bylaw

## 4.5

### **CITYWIDE RETAIL INVENTORY**

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

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, satellite and GIS mapping measurements.

As documented in **Tables 4.3 and Figure 4.6**, the City of Spruce Grove has an estimated retail floorspace of approximately 2.55 million sf. This retail floorspace is comprised of approximately 405 retail premises.

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

Figure 4.5  
**REPRESENTATIVE CITY RETAIL IMAGERY**  
 Source: Photos by Cushing Terrell Architecture Inc.



*Photos Courtesy of Cushing Terrell Architecture Inc., 2017*

# 4

Projects such as the Karo Centre, Queen Street Professional Centre, McQueen Centre, Westland Market Mall, Triton Building and King Street Plaza have ground floor traditional retail included in the retail analysis.

Conversely, those businesses that are more office or civic related are included in the office inventory and analysis in Section 7.0.

Within many of the retail projects in Spruce Grove, Personal and Professional Services often occupy what would otherwise be traditional streetfront retail space.

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

Spruce Grove has surpassed a population threshold whereby a number of other branded chains or retailers would have sufficient market support to warrant a location and in some cases second or multiple locations. One limitation to this, which new developments have begun to address is a deficiency in the quality of retail space and configurations suitable for new market entries.

square feet

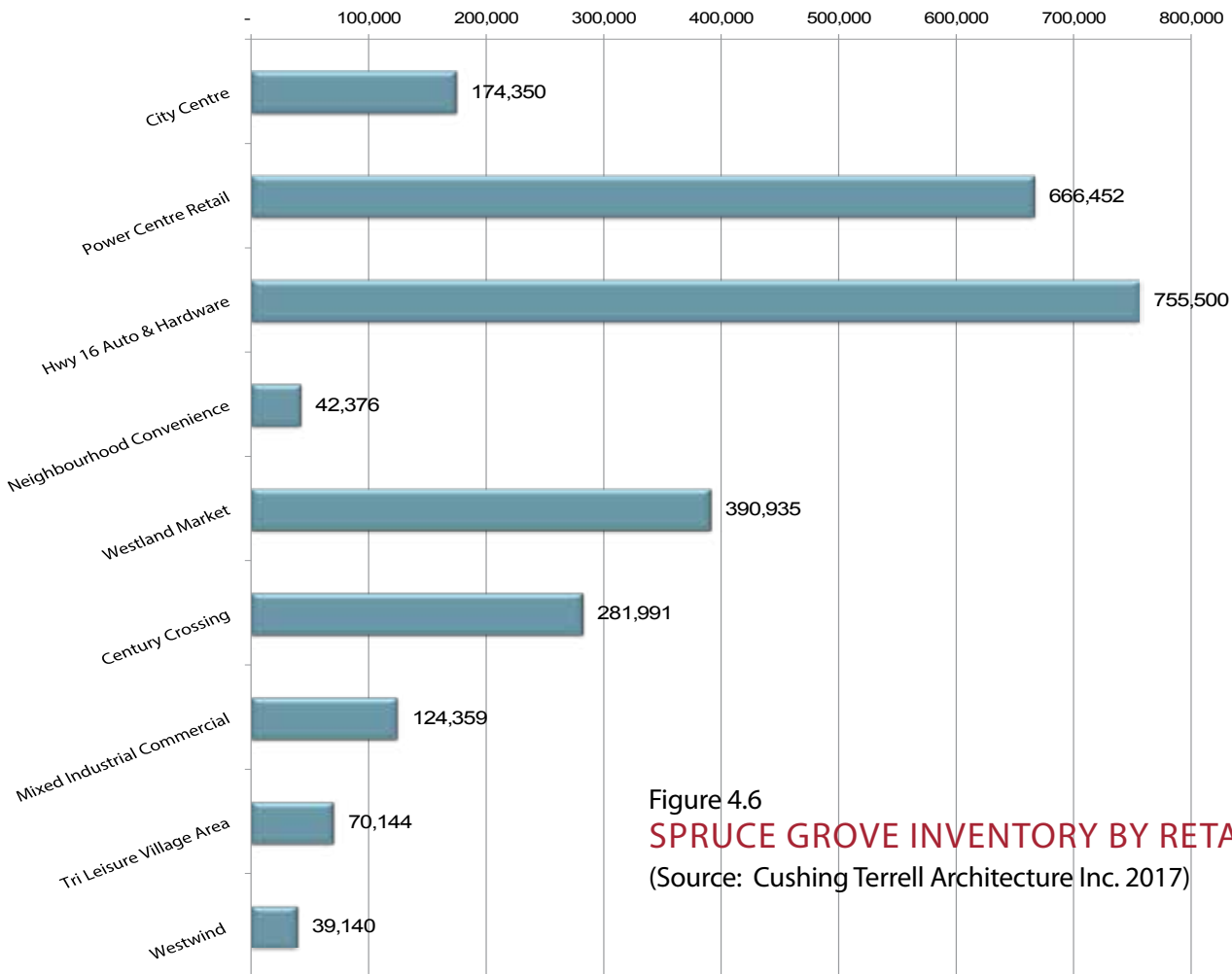


Figure 4.6  
**SPRUCE GROVE INVENTORY BY RETAIL NODES**  
(Source: Cushing Terrell Architecture Inc. 2017)



Table 4.3

**RETAIL INVENTORY BY CATEGORY & NODE**

(Source: Cushing Terrell Architecture Inc and various brokerage firms and property management profiles)

Merchandise Category	IDENTIFIED RETAIL NODE (SF)									Totals (SF)
	City Centre	Power Centre Retail	Hwy 16 Auto & Hardware	N'hood Convenience	Westland Market	Century Crossing	Mixed Industrial Commercial	Tri-Leisure Village Area	Westwind	
Grocery & Specialty Foods	6,200	81,489	500	11,500	85,377	45,247	4,500	5,000	24,000	263,813
Pharmacy	6,500	12,449	0	1,200	14,555	18,837	0	5,000	0	58,541
Alcohol & Tobacco	14,250	8,462	0	4,000	17,250	3,033	0	9,263	2,500	58,758
Personal Services	30,500	24,407	4,500	3,200	15,337	23,619	5,000	7,713	0	114,276
Clothing & Apparel	6,900	97,786	0	1,500	45,878	25,384	0	0	0	177,448
Footwear	0	9,158	0	0	500	0	0	0	0	9,658
Jewelry & Accessories	2,000	8,500	0	0	2,147	1,200	0	0	0	13,847
Health & Beauty	8,000	11,935	0	0	8,607	1,516	0	0	0	30,058
Home Furnishings & Accessories	8,500	17,000	5,000	0	5,000	3,200	6,000	0	0	44,700
Home Electronics & Appliances	0	12,000	2,000	0	2,000	2,400	0	1,298	0	19,698
Home Improvement & Gardening	0	250,497	2,500	0	20,000	29,115	54,991	0	0	357,103
Books & Multimedia	2,750	5,000	0	0	2,355	0	0	0	0	10,105
Sporting Goods & Recreation	0	7,000	2,500	0	16,000	22,000	0	0	0	47,500
Toys & Hobbies	750	8,541	0	0	10,000	0	0	0	0	19,291
Miscellaneous Specialty	18,500	25,270	2,000	0	42,482	34,061	7,060	4,928	1,260	135,561
Full-Service F&B	15,700	24,696	9,500	0	27,653	15,488	0	18,772	0	111,809
Limited Service F&B	22,500	14,172	12,000	2,500	19,445	18,063	0	7,290	3,260	99,230
Entertainment & Leisure	8,800	0	10,000	14,500	0	26,890	10,000	2,619	0	72,809
Auto Parts & Accessories	8,000	38,400	15,000	0	44,000	11,000	36,808	0	0	153,208
Auto/RV/Motorsports Dealership	0	0	690,000	0	0	0	0	0	0	690,000
VACANT	14,500	9,690	0	3,976	12,349	938	0	8,261	8,120	57,834
<b>TOTAL</b>	<b>174,350</b>	<b>666,452</b>	<b>755,500</b>	<b>42,376</b>	<b>390,935</b>	<b>281,991</b>	<b>124,359</b>	<b>70,144</b>	<b>39,140</b>	<b>2,545,247</b>



# 4

As new projects get developed, the quality of spaces will be conducive to providing the types of spaces retailers are looking for and in locations that are appealing to them.

## 4.6

### RETAIL INVENTORY BY NODE

Based on fieldwork and inventory, Spruce Grove's Retail environment was allocated into eight clusters or nodes. Each node was determined based on geographic and spatial factors such as road networks, patterns of residential development or types of inventory. The result were 8 nodes totaling 2.55 million sf.

Hwy 16 A and the various retail nodes therein (Century Crossing, Westland Market, Westgrove/ Real Canadian Superstore, WalMart) comprise the majority of the comparison or destination types of shops and services, while the City Centre node has a large number of Personal and Medical Services, with a very limited retail offering, though the future City Centre Area Redevelopment Plan has a vision for creating a stronger retail presence in the City Centre anchored around office, civic and community events.

Current neighbourhood retail is well allocated and dispersed to provide sufficient basic necessities and services for residents. Future neighbourhood retail should be cautiously looked at, particularly realizing the end types of users at the newest Deer Park and Westwind neighbourhood nodes and, which arguably do not have a particularly strong retail mix, but rather are service driven.

**Figures 4.6 (pg 41) & 4.7 (pg 44)** provide a breakdown of the City's retail inventory by node and by merchandise category respectively.

These figures show where the respective concentrations of retail exist as well as which merchandise categories are in large supply or perhaps in some cases under supplied.

Categories which could be identified as potential areas of opportunity include Home Furnishings, Toys & Hobbies, Shoe Stores, Home Electronics & Casual sit-down family restaurants.

**Table 4.3** provides a foundation for identifying by location where specific categories are being over/ under supplied. For example, over one quarter (27%) of Health & Beauty and Personal Services (38,500 sf) are provided in the City Centre, which is ultimately the core strength and asset of the City Centre, as it exists today.

Century Crossing has quickly grown to comprise almost 11% of the total retail space in the City.

Overall, the Hwy 16 A node, dominated by larger auto dealerships accounts for almost 30% of the City's retail space. From a non-auto related perspective the Westgrove/Sunrise Commercial area which has WalMart and Real Canadian Superstore accounts for 26% of the total retail space, followed next by Westland Market area at 15%, which is also the most "balanced" retail node in terms of overall category presence.

## 4.7

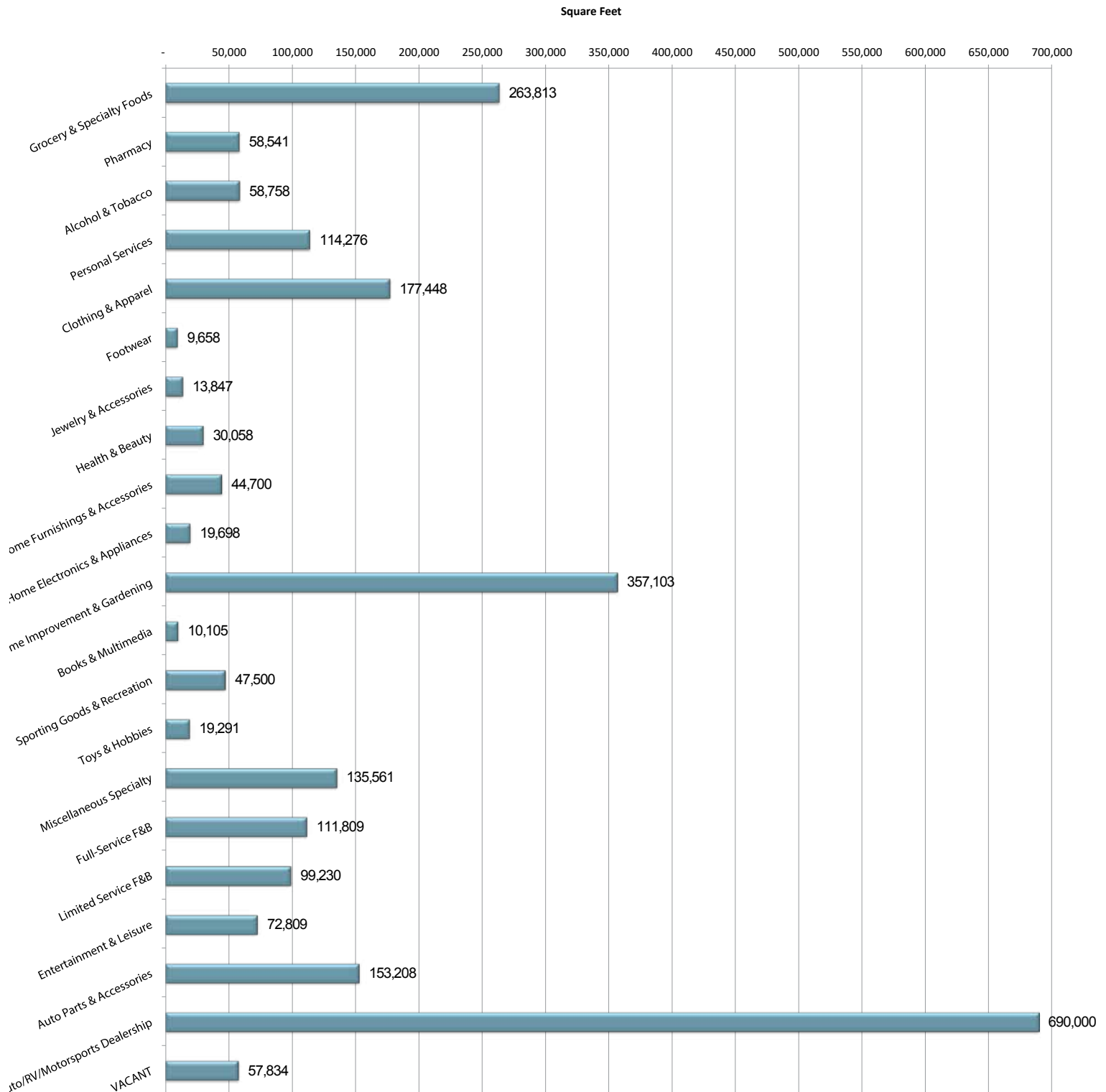
### RETAIL INVENTORY BY CATEGORY

Categories of retail were also incorporated into the overall inventory list as shown in **Figure 4.7**. Designating retail categories to the overall inventory makes it possible to conduct a category void analysis for Spruce Grove.

Figure 4.7

## CITY OF SPRUCE GROVE RETAIL INVENTORY FLOORSPACE BY CATEGORY

(Source: Cushing Terrell Architecture Inc. 2017)



# 4

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

On a citywide basis, the Top 5 retail categories (excluding Auto/RV/Motorsports Dealerships) in terms of overall retail floorspace include:

1. *Home Improvement & Garden* 357,100 sf
2. *Grocery & Specialty Foods* 263,800 sf
3. *Full & Limited Service F&B* 211,000 sf
4. *Clothing & Apparel* 187,100 sf
5. *Miscellaneous Specialty* 135,900 sf

**Figure 4.7** illustrates a the high level of inventory for Home Improvement & Gardening. This category accounts for 14.0% of Spruce Grove's total retail inventory.

Newer developments/redevelopments, particularly Century Crossing have proven to be very successful in attracting both local and branded tenants. Location will always be one of the most critical determinants, particularly for a comparison retailer for whom patronage is required from beyond a localized Trade Area.

Categories which show a low level of inventory include Jewelry & Accessories (13,847 sf in 7 stores) and Footwear (9,658 sf in 3 stores excluding General Merchandisers). Together these two categories make up less than 1.0% of Spruce Grove's total retail inventory. Each

of these categories may be considered under-served, however they are conducive to Spruce Grove's market profile, when considering the demographics and typical store size formats.

Although Books & Multi-Media is also an underrepresented category, industry-wide the Book industry continues to struggle in the face of on-line competition by vendors such as Amazon. Nonetheless, a store such as Indigo/Chapters, which is undergoing a transformational shift to become a "cultural department store" could represent a potential addition to the City's retail inventory, particularly given a continued desire by Consumer Survey respondents to want this category.

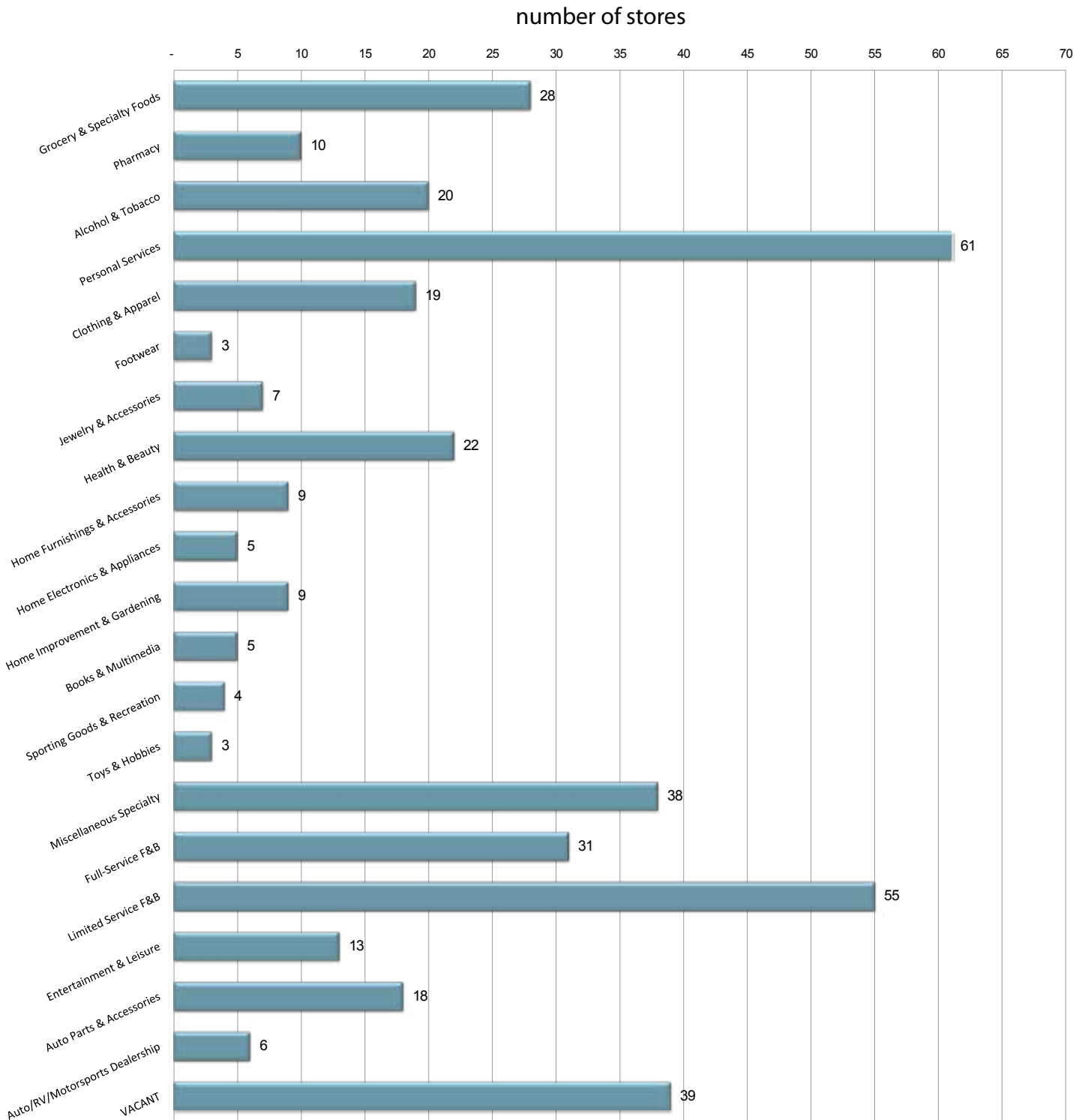
The success of a project like Century Crossing further sets the stage for a store like Chapters/Indigo to enter the Spruce Grove Market as Century Crossing has the roster of co-tenants that Chapters/Indigo would require. While Indigo Spirit recently took over from Coles in the Westland Market, it is entirely reasonable to opine and possible that future growth in Spruce Grove would warrant a transition to a new format Indigo/Chapters location in the City, either at the future Pioneer Lands or West Central ASP lands.

Home Electronics is also a category considered very compatible with Spruce Grove's market profile, when considering the demographics and typical store size formats and as such the current inventory at less than 20,000 sf (19,698 sf) is relatively low, recognizing that much of that space is located in multiple "general merchandise" type stores, such as WalMart, Real Canadian Superstore.

Figure 4.8

### CITY OF SPRUCE GROVE RETAIL INVENTORY BY CATEGORY & NUMBER OF STORES

(Source: Cushing Terrell Architecture Inc. 2017)



# 4

Taking into account the overall area of the Spruce Grove Market the number of stores associated with Health & Beauty and Personal Services, which often have category cross-over is relatively high at 82 stores (refer to **Figure 4.8**). This figure represents 20% of all retail stores in Spruce Grove and is an indicator of the personal wellness and quality of life attributes and aspirations of the community.

As shown through the retail inventory category analysis and location analysis, Spruce Grove's retail market would seem to be reaching a point whereby on a square foot basis there is a critical mass, though the mix of categories or critical mix is now becoming more the issue as it relates to refining and ultimately balancing Spruce Grove's retail offering.

## 4.8

### RETAIL INVENTORY BY CLASS

As previously shown through a retail inventory category analysis and location analysis, there does exist some imbalance in the Spruce Grove retail market on a category basis.

Spruce Grove's retail landscape and inventory continues to be somewhat fragmented partly due to varying degrees of infrastructure quality.

Therefore the analysis shown in **Tables 4.4 & 4.5** is a valuable tool to shed light on opportunities associated with categories of retail which either may be relying on Spruce Grove's older infrastructure or may be looking to relocate to more modern spaces in the coming years.

The categorization of Class is based on a subjective evaluation criteria such as the age of the building (e.g. older than 5 yrs), locational attributes (e.g. parking, access, visibility) and whether the tenant is a chain store or local (refer to notation beside **Figure 4.9**).

It is worth noting that over the past few years, this evaluation process for determining Class A, B & C retail space has evolved and been refined. This process has therefore led to a re-evaluation of the overall classification of inventory which means that a direct comparison to previous evaluations is not directly applicable.

Accordingly, Alcohol & Tobacco, Health & Beauty, Home Furnishings, Full Service F&B and Limited Service F&B are categories which all have in the range of 25% to 35% of total inventory located in poor Class C quality infrastructure, which suggests their productivities will not be as high as they could be if they were in stronger locations and better quality premises. For local operators, these spaces would likely work economically, however for branded tenants they will likely pursue newer higher quality spaces.

As displayed in **Figure 4.9**, the calibre of retail in Spruce Grove continues to improve with the addition of Century Crossing, Westwind and other infill projects like the Karo Southworks and new pad developments at Westland Market Mall. While the majority of retail spaces (66%) fall within the A Class quality/performance, simply because of the strong locations and relative quality of buildings. C Class accounts for just under 20% of the total retail space.

**Over the past 5 years new projects have continued to increase the overall quality of retail space in the City, whereby areas such as the City Centre remains the next target for retail reinvestment and opportunity.**

As previously mentioned Spruce Grove's retail landscape is highly fragmented partly due to its aging infrastructure. As a retail market evolves, newer developments take shape and older areas are either redeveloped or re-positioned to provide space for businesses which may require lower rents.

Table 4.4

## CITY OF SPRUCE GROVE RETAIL INVENTORY BY CLASS & CATEGORY

(Source: Cushing Terrell Architecture Inc. 2017)

Merchandise Category	Existing Inventory (SF)	Existing Inventory (%)	Class A (SF)	Class B (SF)	Class C (SF)	Class A (%)	Class B (%)	Class C (%)
Grocery & Specialty Foods	263,813	10%	204,436	42,877	16,500	77%	16%	6%
Pharmacy	58,541	2%	40,286	16,755	1,500	69%	29%	3%
Alcohol & Tobacco	58,758	2%	21,258	15,600	21,900	36%	27%	37%
Personal Services	114,276	4%	45,755	44,021	24,500	40%	39%	21%
Clothing & Apparel	177,448	7%	124,370	50,378	2,700	70%	28%	2%
Footwear	9,658	0%	9,158	500	0	95%	5%	0%
Jewelry & Accessories	13,847	1%	9,700	2,147	2,000	70%	16%	14%
Health & Beauty	30,058	1%	12,701	7,687	9,670	42%	26%	32%
Home Furnishings & Accessories	44,700	2%	20,200	6,500	18,000	45%	15%	40%
Home Electronics & Appliances	19,698	1%	15,698	2,000	2,000	80%	10%	10%
Home Improvement & Gardening	357,103	14%	279,612	22,500	54,991	78%	6%	15%
Books & Multimedia	10,105	0%	5,000	2,355	2,750	49%	23%	27%
Sporting Goods & Recreation	47,500	2%	29,000	16,000	2,500	61%	34%	5%
Toys & Hobbies	19,291	1%	8,541	10,750	0	44%	56%	0%
Miscellaneous Specialty	135,561	5%	66,029	41,972	27,560	49%	31%	20%
Full-Service F&B	111,809	4%	53,064	22,245	36,500	47%	20%	33%
Limited Service F&B	99,230	4%	45,685	32,095	21,450	46%	32%	22%
Entertainment & Leisure	72,809	3%	29,509	17,500	25,800	41%	24%	35%
Auto Parts & Accessories	153,208	6%	89,400	4,000	59,808	58%	3%	39%
Auto/RV/Motorsports Dealership	690,000	27%	550,000	0	140,000	80%	0%	20%
VACANT	57,834	2%	31,041	8,993	17,800	54%	16%	31%
<b>TOTAL</b>	<b>2,545,247</b>	<b>100%</b>	<b>1,690,443</b>	<b>366,875</b>	<b>487,929</b>	<b>66%</b>	<b>14%</b>	<b>19%</b>

Table 4.5

## CITY OF SPRUCE GROVE RETAIL INVENTORY BY CLASS OF RETAIL SPACE

(Source: Cushing Terrell Architecture Inc. 2017)

Identified Retail Node	Total Inventory (SF)	Inventory Class A (SF)	Inventory Class B (SF)	Inventory Class C (SF)	Number of Stores	Average Store Size (SF)	Inventory Class A (%)	Inventory Class B (%)	Inventory Class C (%)
City Centre	174,350	12,182	39,818	122,350	110	1,585	7%	23%	70%
Power Centre Retail	666,452	637,012	29,440	0	77	8,655	96%	4%	0%
Hwy 16 Auto & Hardware	755,500	556,500	8,000	191,000	25	30,220	74%	1%	25%
Neighbourhood Convenience	42,376	0	34,876	7,500	20	2,119	0%	82%	18%
Westland Market	390,935	104,724	237,491	48,720	75	5,212	27%	61%	12%
Century Crossing	281,991	281,991	0	0	45	6,266	100%	0%	0%
Mixed Industrial Commercial	124,359	0	6,000	118,359	20	6,218	0%	5%	95%
Tri Leisure Village Area	70,144	58,894	11,250	0	19	3,692	84%	16%	0%
Westwind	39,140	39,140	0	0	14	2,796	100%	0%	0%
<b>TOTAL</b>	<b>2,545,247</b>	<b>1,690,443</b>	<b>366,875</b>	<b>487,929</b>	<b>405</b>	<b>6,285</b>	<b>66%</b>	<b>14%</b>	<b>19%</b>

# 4

Figure 4.9

## CITY OF SPRUCE GROVE RETAIL INVENTORY BY CLASS OF RETAIL SPACE

(Source: Cushing Terrell Architecture Inc. 2014)

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

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

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

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

The analysis provided in **Table 4.5** shows that the City Centre node is still the area that is most under performing and struggles with the majority of its space classified as Class C (70% of inventory).

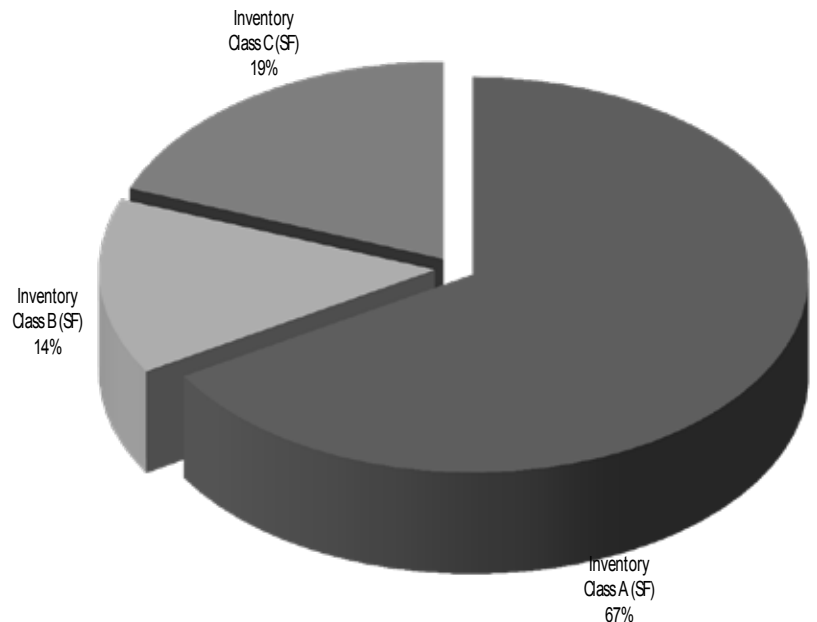
Similarly, the Mixed Industrial Commercial area is also comprised of older retail space (95% Class C), but the types of uses and location of these uses likely has less of an impact on their sales than comparable businesses in the City Centre.

The role of the classification is to provide a sensitized figure against which sales productivities can be forecast. For example, a retail in Spruce Grove's City Centre is likely to have a lower sales productivity than a comparable store at Century Crossing or Westgrove Common. Such differences need to be taken into account when estimating retail sales and resulting demand.

### 4.9

#### 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 retailled or over retailled.



In most urban markets in Canada and the United States, a typical benchmark for ALL retail space per capita is in the range of 30 sf to 40 sf (Source: International Council of Shopping Centers). For most markets that fall within the 30 to 40 sf per capita range, they are typically local-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 contrast, markets that have much larger retail space per capita ratios are indicators that a market has a much wider Trade Area that extends well beyond its own city boundaries. Spruce Grove is such a market.

When applying the retail inventory for the City of Spruce Grove against the City's population, the resulting per capita ratio is 72.9 which if looked at in isolation of its regional market would suggest the City could be over-retailed.



**WILLY'S**  
**BEEF JERKY**

OPEN

**YOU DON'T  
WIN  
FRIENDS  
WITH  
SALAD!**

**WILLY'S**  
**BEEF JERKY**

*Photo Courtesy of Cushing Terrell Architecture Inc, 2017*



# 4

fact

775,000 sf new retail space

future demand by 2027 based on  
forecasted population growth

However, not only does this figure illustrate the regional inflow, but the figure does not take into account the quality of the retail space and thus it should be acknowledged that older obsolete space can sometimes skew this figure.

**Because the city's inventory actually caters to a much wider regional market, if one takes a cursory look at the inventory and assumes that an inventory of 3 million sf and applies this against the Primary and Secondary Retail Trade Area population of 137,500 sf, then the per capita figure drops considerably to 21.8 sf.**

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

Another way to look at forecasted demand, at a high level is to apply a retail space per capita ratio based upon "organized shopping centre space".

When the inventory for the City of Spruce Grove is quantified based on only those organized shopping centres greater than 40,000 sf (in other words, applying the same standard quantification that ICSC uses), the retail space per capita for Spruce Grove works out to 38.4, which is higher than the provincial average of approximately 20 sf per capita, but in line with the regional dynamics that make Spruce Grove a successful retail market.

If a retail space per capita ratio is applied against Spruce Grove's future population growth the following becomes evident.

By 2027, assuming a population of 50,059 or growth of 20,178 from today's population and a per capita ratio of 38.4, the City of Spruce Grove could warrant additional retail demand in the magnitude of 775,000 sf.

Per capita ratios are useful because they are premised on the actual amount of retail supportable in a respective community assuming all spending occurs locally.

The other approach to estimating demand is by applying retail expenditure against population growth and sales productivities. Once this figure is calculated, a market share is typically applied realizing that not all of a respective market's spending stays within the city's limits.

In the case of Spruce Grove, the subsequent sections will help to illustrate the market share approach to demand.

But for the purposes of forecasting, expenditure estimates suggest that by 2027 the City's total retail spending generated by residents in the City of Spruce Grove will be approximately \$601 million (assuming an average annual growth in household spending of 1.5% per annum). Applying a productivity of \$300 per sf, would equate to approximately 2.0 million sf of total current supportable demand.

The next step would apply an estimated market share to that figure, which estimates that percentage of the total demand that could be retained in Spruce Grove. Section 5.0 will reveal that in the case of Spruce Grove, its current market share is 56%. Therefore, a 56% market share of 2.0 million sf could result in approximately 1.1 million sf of new retail space for Spruce Grove by 2027.

Therefore, assuming continued economic resurgence and stable population growth estimates, it is reasonable to forecast approximate retail demand for 750,000 to as much as 1 million sf of new retail space in the City by 2027.



*Photos Courtesy of City of Spruce Grove, 2017*

# 4

The variations would be dependent upon population growth or maintaining, or even increasing the current market shares of retained spending in the City from current levels.

At this stage, it needs to be noted that simply because demand warrants, does not mean that this space has to be built. It is important for the City to make sure that the right retail mix is brought into the community and that any such development and growth does not hinder other critical nodes, such as the City Centre.

## 4.10

### SUMMARY & IMPLICATIONS

The resulting inventory for the City of Spruce Grove clearly illustrates a regional retail offering that provides the day-to-day as well as non-destination oriented, yet essential comparison merchandise. The City of Spruce Grove's retail inventory continues to mature and evolve to point whereby concerns are less so with the overall amount of retail space, but rather more so with the actual mix of specific retail. Spruce Grove is a regional retail market which continues to growth in-step with population growth outwards from the City of Edmonton.

The City has an estimated retail inventory of almost 2.55 million sf with a vacancy of 2.4%.

Even with new developments in the City, the retail vacancy has trended downwards from 4% in 2015 to less than 3% in 2017, further validating the Spruce Grove retail market a strong, self-sufficient and successful retail market.

Recent new developments such as Century Crossing as well as the McQueen Building in the City Centre along with re-positioned assets like Westland Market Mall continue to provide higher quality retail spaces more appealing and beneficial to attracting new tenants to the market.

The future relocation of Main Street Law into a new 3-stoerey building in the City Centre along First Avenue will further bolster the retail attractiveness in the City Centre.

Though Spruce Grove continues to be heavily retailed in Home Improvement & Gardening, categories like Home Furnishings, Fashion (clothing & footwear), Full Service Restaurants and Toys & Hobbies present immediate opportunities and voids in the market that could be enhanced in response to the strong demographic profile and above average population growth rates that exceed 4% per annum.

Often, a growing market that starts to get new sought after tenants starts to exhibit further aspirational attributes that indicate they can get bored quickly if other comparison shopping opportunities aren't provided. This is the double-sided nature of attracting retail businesses. The case in point at the value ends of the price point spectrum would be the introduction of Winners and Value Village, each of which has been met with great success in Spruce Grove. In the near future though, expectations will be for Spruce Grove to have more retail at mid price points with retailers such as H&M, Aldo, Shoe Company, Urban Barn, Bouclair, Mastermind Toys, Buy Buy Baby etc. If not provided, then the propensity for outflow could resurface.

Future demand forecasts for new retail space over the next decade suggest that the City of Spruce Grove could grow by an additional 775,000 to 1 million sf. Pioneer Point is one such development that will tap into this figure, as could potential development within the West Central Area Structure Plan (northwest corner of Hwy 16A and Jennifer Heil Way). This is a cumulative figure and thus any demand would need to occur in step and balance with demand from both the market, consumer and tenant perspectives.

# !ndigo spirit

APER SHOP



# 5 RETAIL DEMAND & GAP ANALYSIS

## 5.1 INTRODUCTION

The following section will delve deeper and quantify the amount of supportable floorspace in the City of Spruce Grove 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' retail sales.

## 5.2 RETAIL FLOORSPACE DEMAND BY TRADE AREA SEGMENT

**Tables 5.1 through 5.4** depict the Retail Floorspace demand estimates from Spruce Grove's PTA and STA. 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 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 Spruce Grove could reasonably be expected to garner from each respective Trade Area.

Market Share estimates are derived in part from the results of the Consumer Intercept Survey (conducted in 2015) which asked respondents what percentage of their retail spending on a specific category was "inside Spruce Grove" or "outside Spruce Grove".

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

### *City of Spruce Grove Supply - Demand*

Starting with **Table 5.1**, the City of Spruce Grove as a stand-alone market is quantified to determine, based on expenditure and market shares, just how much retail space the City's 35,000 residents could reasonably justify irrespective of its regional pull, which ultimately will be factored into the total demand.

Accordingly, **Table 5.1** reveals that in isolation, the City's residents could justify approximately just over 770,000 sf of retail space, at an overall market share of 56% (this figure comes from the Consumer Intercept Survey). It is not inconceivable that since 2015, with the further entrenchment of nodes like Century Crossing that the retained market share of resident spending could be higher. If, for example the retained market share of City resident spending were 60% or even 65%, the supportable demand would be just over 815,000 sf or 885,000 sf respectively.

Since this study is examining the City of Spruce Grove's retail market, the resulting market shares and demand are viewed as "retained" in that 56% of total City of Spruce Grove resident spending is retained in the City of Spruce Grove.

**TABLE 5.1**  
**CITY OF SPRUCE GROVE RETAIL FLOORSACE DEMAND**

Retail Spending by Merchandise Category	2017 (Year End Est.)			
	City of Spruce Grove Retail Sales Productivity (\$psf)	Retained Market Share	Retained Sales \$	Floorspace Demand (sf)
Grocery & Specialty Foods	\$500	91%	\$93,873,910	187,748
Pharmacy	\$550	91%	\$9,785,488	17,792
Alcohol & Tobacco	\$500	91%	\$25,015,920	50,032
Personal Services	\$275	77%	\$18,376,929	66,825
Clothing & Apparel	\$275	44%	\$17,795,348	64,710
Footwear	\$250	44%	\$3,969,684	15,879
Jewelry & Accessories	\$500	44%	\$3,473,473	6,947
Health & Beauty	\$400	75%	\$7,767,418	19,419
Home Furnishings & Accessories	\$250	14%	\$5,666,954	22,668
Home Electronics & Appliances	\$550	15%	\$5,534,510	10,063
Home Improvement & Gardening	\$250	63%	\$7,286,669	29,147
Books & Multimedia	\$250	25%	\$1,943,560	7,774
Sporting Goods & Recreation	\$250	33%	\$2,295,601	9,182
Toys & Hobbies	\$250	44%	\$2,433,854	9,735
Miscellaneous Specialty	\$225	44%	\$6,739,279	29,952
Full-Service F&B	\$350	57%	\$10,353,113	29,580
Limited Service F&B	\$550	77%	\$10,163,705	18,479
Entertainment & Leisure	\$200	38%	\$8,710,529	43,553
Auto Parts & Accessories	\$375	49%	\$3,818,238	10,182
Auto/RV/Motorsports Dealership	\$400	49%	\$47,514,318	118,786
<b>TOTAL RETAIL CATEGORIES ONLY</b>	<b>\$381</b>	<b>56%</b>	<b>\$292,518,499</b>	<b>768,453</b>

**TABLE 5.2**  
**PRIMARY TRADE AREA (Including City of SG) RESIDENT RETAIL FLOORSACE DEMAND**

Retail Spending by Merchandise Category	2017 (Year End Est.)			
	PTA Incl Spruce Grove Retail Sales Productivity (\$psf)	Inflow & Retained Market Share	Inflow & Retained Sales \$	Floorspace Demand (sf)
Grocery & Specialty Foods	\$500	86%	\$247,494,004	494,988
Pharmacy	\$550	86%	\$28,381,920	51,603
Alcohol & Tobacco	\$500	86%	\$62,385,231	124,770
Personal Services	\$275	74%	\$45,635,515	165,947
Clothing & Apparel	\$275	41%	\$42,520,286	154,619
Footwear	\$250	41%	\$9,602,780	38,411
Jewelry & Accessories	\$500	41%	\$7,260,998	14,522
Health & Beauty	\$400	65%	\$17,441,746	43,604
Home Furnishings & Accessories	\$250	14%	\$11,666,404	46,666
Home Electronics & Appliances	\$550	19%	\$16,222,711	29,496
Home Improvement & Gardening	\$250	63%	\$22,959,315	91,837
Books & Multimedia	\$250	24%	\$4,904,658	19,619
Sporting Goods & Recreation	\$250	30%	\$5,027,452	20,110
Toys & Hobbies	\$250	42%	\$5,942,142	23,769
Miscellaneous Specialty	\$225	45%	\$18,048,395	80,215
Full-Service F&B	\$350	57%	\$26,309,522	75,170
Limited Service F&B	\$550	76%	\$25,483,987	46,335
Entertainment & Leisure	\$200	38%	\$20,674,591	103,373
Auto Parts & Accessories	\$375	44%	\$10,737,448	28,633
Auto/RV/Motorsports Dealership	\$450	44%	\$115,419,739	256,488
<b>TOTAL RETAIL CATEGORIES ONLY</b>	<b>\$390</b>	<b>55%</b>	<b>\$744,118,844</b>	<b>1,910,176</b>

# 5

The remaining 44% is considered outflow and spent elsewhere in the City of Edmonton or to a lesser degree in neighboring Stony Plain.

The resulting figures in **Table 5.1** depict a market that retains very strong market share for conveniences and necessity goods, and a relatively healthy retention for comparison goods averaging in the range of 40% to 50% for categories like apparel and sporting goods, which have improved in the past few years.

It is no surprise to see a correlation with the lack of sales retention for categories such as Home Furnishings and Home Electronics, which are among the weaker in terms of category representation in the community. This suggests a strong opportunity to target Home Furnishings and Home Electronics.

### ***Primary Trade Area (Including City of Spruce Grove) Supply - Demand***

**Table 5.2** illustrates the combined floorspace demand resulting from the Primary Trade Area (PTA), which includes the City of Spruce Grove, Stony Plain and other neighbouring residents to the west as delineated in the Trade Area. The figures reveal demand for approximately 1.9 million sf of retail at a combined market share of approximately 55%.

### ***Secondary Trade Area Supply - Demand***

To account for Spruce Grove's regional appeal, spending inflow originating outside of the City of Spruce Grove was also quantified for the Secondary Trade Area (STA).

Referring to **Figure 3.1**, the STA is the region that extends west, northwest and southwest of the PTA and includes such towns as such as Sangudo, Entwistle, Wildwood and Mayerthorpe.

The STA plays an important role in Spruce Grove's overall demand since Spruce Grove is the regional serving hub for this population base of approximately 41,000 residents.

STA inflow and the resulting spending and market shares have been estimated to document the amount of floorspace demand.

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

**Table 5.3** reveals the demand for floorspace in the City of Spruce Grove attributable to residents in the STA at approximately 425,000 sf at a market share of 30%.

Even though Spruce Grove serves as a critical regional hub for the STA, the patterns of sales inflow suggest that with an improved comparison offering the city could garner more inflow from this Trade Area.

As it is today, it could be reasonable to assume that for comparison merchandise beyond the basic necessities that the STA residents bypass Spruce Grove and go into the City of Edmonton.

There is an opportunity in conjunction with population growth to increase the level of inflow with a further improved offering.

**TABLE 5.3**  
**SECONDARY TRADE AREA RETAIL FLOORSPACE DEMAND**

Retail Spending by Merchandise Category	2017 (Year End Est.)			
	STA Retail Sales Productivity (\$psf)	Inflow Market Share	Inflow Sales \$	Floorspace Demand (sf)
Grocery & Specialty Foods	\$500	45%	\$55,337,748	110,675
Pharmacy	\$550	45%	\$7,260,627	13,201
Alcohol & Tobacco	\$500	45%	\$14,346,824	28,694
Personal Services	\$275	30%	\$7,421,053	26,986
Clothing & Apparel	\$275	29%	\$11,748,535	42,722
Footwear	\$250	29%	\$2,748,335	10,993
Jewelry & Accessories	\$500	29%	\$1,744,595	3,489
Health & Beauty	\$400	30%	\$3,371,419	8,429
Home Furnishings & Accessories	\$250	8%	\$2,156,800	8,627
Home Electronics & Appliances	\$550	9%	\$2,985,447	5,428
Home Improvement & Gardening	\$250	34%	\$5,258,773	21,035
Books & Multimedia	\$250	22%	\$1,733,641	6,935
Sporting Goods & Recreation	\$250	22%	\$1,423,597	5,694
Toys & Hobbies	\$250	14%	\$795,449	3,182
Miscellaneous Specialty	\$225	29%	\$4,861,753	21,608
Full-Service F&B	\$350	30%	\$5,618,400	16,053
Limited Service F&B	\$550	45%	\$5,999,719	10,909
Entertainment & Leisure	\$200	24%	\$4,886,989	24,435
Auto Parts & Accessories	\$375	22%	\$2,504,810	6,679
Auto/RV/Motorsports Dealership	\$450	22%	\$22,217,992	49,373
<b>TOTAL RETAIL CATEGORIES ONLY</b>	<b>\$387</b>	<b>30%</b>	<b>\$164,422,507</b>	<b>425,147</b>

**TABLE 5.4**  
**TOTAL RETAIL TRADE AREA FLOORSPACE DEMAND**

Retail Spending by Merchandise Category	2017 (Year End Est.)			
	Overall Market Share	Total Floorspace Demand (sf)	Current City Retail Inventory (sf)	Total Residual Demand (sf)
Grocery & Specialty Foods	74%	605,664	263,813	341,851
Pharmacy	72%	64,805	58,541	6,264
Alcohol & Tobacco	73%	153,464	58,758	94,706
Personal Services	62%	192,933	114,276	78,657
Clothing & Apparel	38%	197,341	177,448	19,893
Footwear	38%	49,404	9,658	39,746
Jewelry & Accessories	38%	18,011	13,847	4,164
Health & Beauty	55%	52,033	30,058	21,975
Home Furnishings & Accessories	12%	55,293	44,700	10,593
Home Electronics & Appliances	16%	34,924	19,698	15,226
Home Improvement & Gardening	54%	112,872	357,103	-244,231
Books & Multimedia	23%	26,553	10,105	16,448
Sporting Goods & Recreation	28%	25,804	47,500	-21,696
Toys & Hobbies	34%	26,950	19,291	7,659
Miscellaneous Specialty	40%	101,823	135,561	-33,738
Full-Service F&B	49%	91,223	111,809	-20,586
Limited Service F&B	67%	57,243	99,230	-41,987
Entertainment & Leisure	34%	127,808	72,809	54,999
Auto Parts & Accessories	37%	35,313	153,208	-117,895
Auto/RV/Motorsports Dealership	38%	305,862	690,000	-384,138
<b>TOTAL RETAIL CATEGORIES ONLY</b>	<b>48%</b>	<b>2,335,323</b>	<b>2,487,413</b>	<b>-152,090</b>



# 5

## Retail Trade Area Supply - Demand

**Table 5.4** aggregates the total demand for floorspace in the City of Spruce Grove attributable to residents of the Primary and Secondary Trade Areas at approximately 2.34 million sf at 48% market share. When compared against the current city's *occupied* (excluding vacant space) retail inventory or supply at 2.48 million sf, the difference between demand and supply equates to just over 152,000 sf of oversupply in terms of retail space.

**In the overall picture, this is not a significant component, particularly given that current retained market shares are seen as conservative given the strategic retail additions over recent years. For example, if the retained market share for the PTA were 60% (an increase of 5%) the overall impact would mean a residual demand of near zero. Therefore, these overall demand figures suggest that the City of Spruce Grove and its regional penetration are largely in balance with growth, yet still have opportunity for further growth.**

Given the nature of the current inventory on a category basis and the types of categories under-represented, the City should focus its retail tenant recruitment strategy on specific tenants and merchandise categories that exhibit strong retail sales inflow potential. Examples include Home Furnishings, Home Electronics, Toys & Hobbies, Clothing, Footwear and Full Service Restaurants (casual family-oriented).

## 5.3

### RETAIL GAP QUANTIFICATION

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

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

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

**Table 5.5 and Figure 5.1** illustrate the Retail Gap Analysis on a category-by-category basis for the City of Spruce Grove.

It is not surprising to see that the findings indicate strong inflow of sales dollars, with leakage in key sectors where inventory and/or quantity/quality of offering is limited.

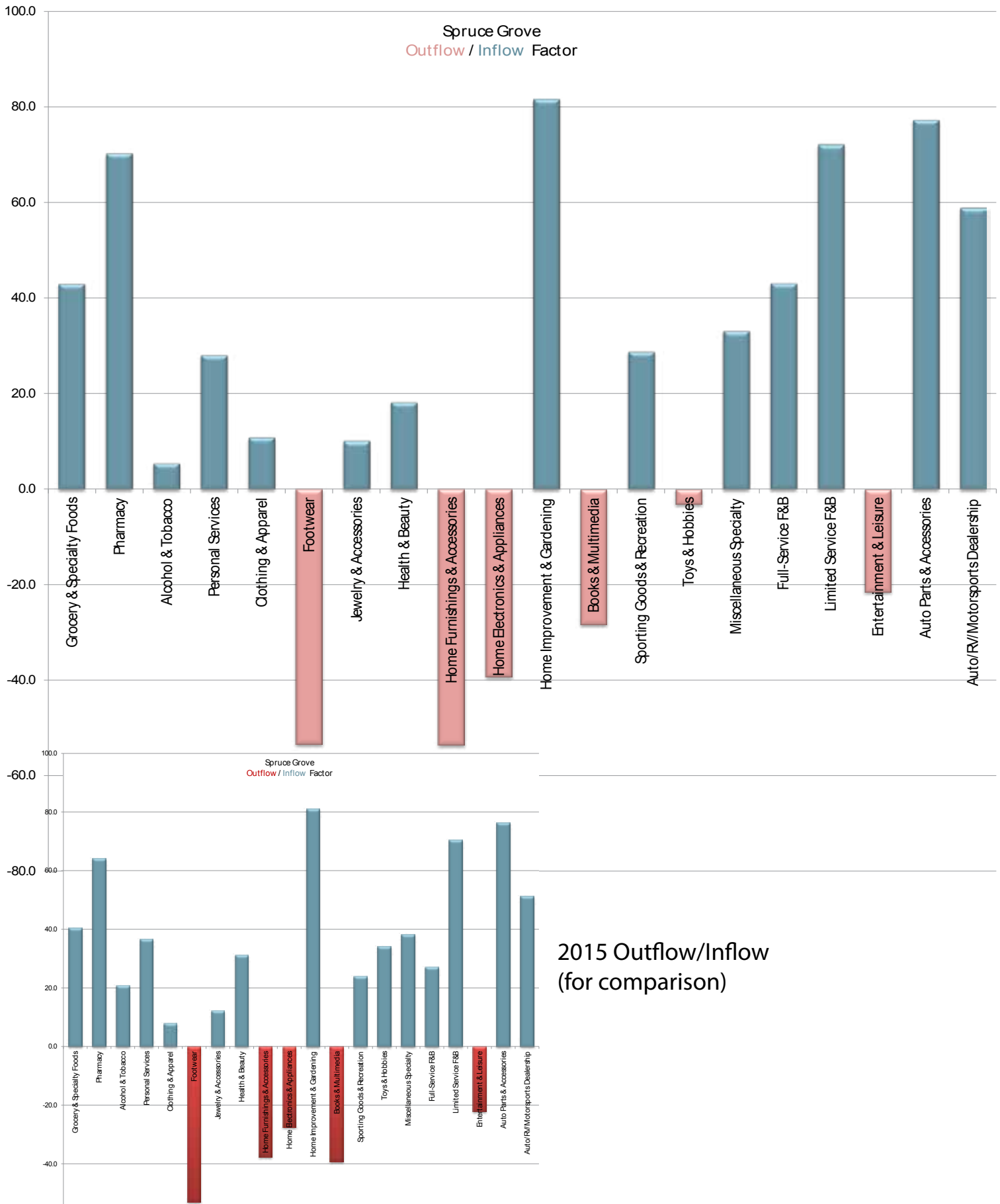
## 5.4

### RETAIL INFLOW & OUTFLOW

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

FIGURE 5.1

# CITY OF SPRUCE GROVE RETAIL SPENDING INFLOW & OUTFLOW



# 5

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

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.

**Figure 5.1** reveals a pattern of spending that again clearly substantiates the idea that the City of Spruce Grove is a regional draw with commensurate sales inflow.

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 delineated Retail 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 Spruce Grove, **Figure 5.1** illustrates a pattern in which more day-to-day types of categories are generating inflow and surplus sales and could thus be targeted by retailers.

One category that has specifically evolved to a point whereby outflow of sales is occurring is the Toys & Hobbies category. In the previous 2015 study, there was a positive inflow, or retention, of sales, but in the 2017 study the sales leakage/outflow for Toys & Hobbies has become evident as a result of limited inventory beyond the inventories offered at Walmart and Canadian Tire. Therefore, there would seem to be a confirmed void in the market and opportunity for stores such as Mastermind Toys or Buy Buy Baby.

Further, categories like Sporting Goods and Full Service Restaurants, even with the introduction of Sport Chek and Brown's respectively, while demonstrating inflow of sales dollars are not showing signs of increasing market penetration suggesting that another specialized sporting goods format could be warranted in the market, given the amount of spending available for those categories. The City of Spruce Grove is becoming a strong sports hub for the region and the overall growth of a foodie-culture is also likely to become more evident with the younger population base.

Spruce Grove has positioned itself well over the past decade in particular and even more so in the past 5 years to attract businesses that garner strong inflow dollars from communities well beyond the City's boundaries.

TABLE 5.5  
RETAIL INFLOW / OUTFLOW ESTIMATES

Merchandise Category	Est. Current Annual Sales by Category	Est. Spruce Grove Expenditure Potential 2017	Spruce Grove Leakage/Surplus Estimates	Spruce Grove Outflow / Inflow Factor
Grocery & Specialty Foods	\$259,558,025	\$103,282,990	\$156,275,035	43.1
Pharmacy	\$61,800,150	\$10,766,298	\$51,033,852	70.3
Alcohol & Tobacco	\$30,716,250	\$27,523,292	\$3,192,958	5.5
Personal Services	\$42,642,500	\$23,934,526	\$18,707,974	28.1
Clothing & Apparel	\$50,451,751	\$40,536,101	\$9,915,650	10.9
Footwear	\$2,747,333	\$9,042,560	-\$6,295,227	-53.4
Jewelry & Accessories	\$9,707,678	\$7,912,240	\$1,795,438	10.2
Health & Beauty	\$14,998,969	\$10,356,557	\$4,642,412	18.3
Home Furnishings & Accessories	\$12,590,625	\$41,638,163	-\$29,047,538	-53.6
Home Electronics & Appliances	\$15,604,493	\$35,845,273	-\$20,240,780	-39.3
Home Improvement & Gardening	\$114,443,175	\$11,571,651	\$102,871,524	81.6
Books & Multimedia	\$4,364,751	\$7,827,466	-\$3,462,715	-28.4
Sporting Goods & Recreation	\$12,768,438	\$7,050,371	\$5,718,067	28.9
Toys & Hobbies	\$5,241,828	\$5,580,955	-\$339,128	-3.1
Miscellaneous Specialty	\$30,660,214	\$15,386,481	\$15,273,733	33.2
Full-Service F&B	\$45,823,286	\$18,176,111	\$27,647,175	43.2
Limited Service F&B	\$81,420,548	\$13,162,011	\$68,258,537	72.2
Entertainment & Leisure	\$15,002,750	\$23,228,076	-\$8,225,326	-21.5
Auto Parts & Accessories	\$61,233,281	\$7,827,466	\$53,405,815	77.3
Auto/RV/Motorsports Dealership	\$376,875,000	\$97,405,326	\$279,469,674	58.9
VACANT				
<b>TOTAL</b>	<b>\$1,248,651,046</b>	<b>\$518,053,914</b>	<b>\$730,597,132</b>	<b>41.4</b>

# 5

The only categories exhibiting outflow have historically been the types of categories that people are typically prepared to drive 30 - 45 minutes to access, which brings into play a wide array of projects that includes most notably West Edmonton Mall, which according to many consumer survey respondents is among their primary comparison destinations. However, it is not inconceivable to see Spruce Grove's regional strength warrant having these categories and supporting retailers.

While it is not realistic nor recommended for Spruce Grove to try and compete with a project like West Edmonton Mall, particularly for brands that will only look at that type of project, it is reasonable for the City to target some of the brands that may wish to expand into a market where they could either tap into strong inflow or they could tap into spending that is currently outflowing due to a lack of offering.

Given Spruce Grove's retail trade area demographic profile (young adults and families, blue collar workers), residential development and spending attributes (high disposable income), specific target categories include Grocery, Pharmacy, Clothing & Apparel, Home Furnishings, Footwear, Toys & Hobbies and Full Service Restaurants.

## 5.5

### SUMMARY & IMPLICATIONS

The current patterns of retail spending and market share provide further validation that Spruce Grove has a wide regional trade area penetration.

The City is successful in retaining expenditure from its own residents at an overall market share of 56%. Convenience categories average over 90% retained sales from Spruce Grove residents.

Similarly, the City does well to garner inflow from its PTA, largely from Stony Plain and Parkland County residents at an overall market share of 56%, thus a marginal drop in market share.

Total demand across the PTA and STA based on market share of resident spending suggests current demand for approximately 2.34 million sf.

Assuming continued growth and increased market penetration of trade area retail sales, there is an excellent opportunity for the City of Spruce Grove to continue its path of growth for retail. **For example, if the retained market share for the PTA were 60% (an increase of 5%) the overall impact would suggest a healthy balanced retail market as of 2017.**

Spruce Grove's regional catchment is evidenced by a net sales inflow of \$697 million from the PTA and STA combined.

Spruce Grove garners an estimated net inflow of almost \$210.9 million in Convenience Merchandise retail sales from the PTA and STA combined of which \$156 million is in Grocery & Specialty Foods Sales.

Spruce Grove has a leakage/outflow of just under \$49.3 million in Home Furnishings and Home Electronics categories (\$29.0 million and \$20.2 million respectively).

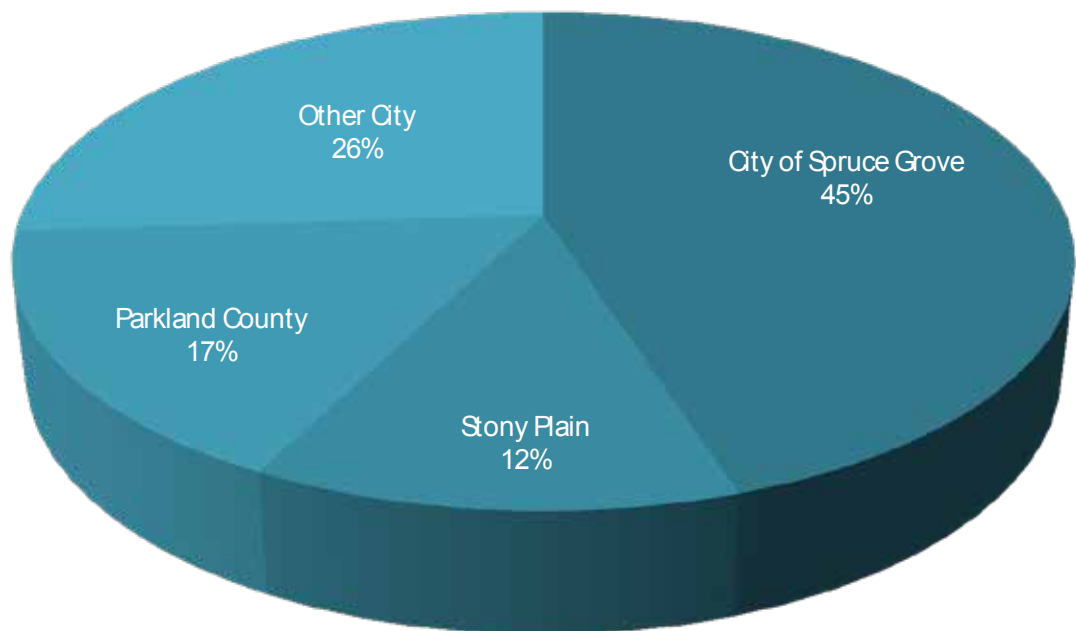
The City should strive to keep balance and seek to identify the optimal mix of categories and store types in the community.

As a goal, the City could aim for 5 percentage point increase in overall market share of expenditure for the entire trade area from 56% to 61% could result in additional demand for almost 425,000 sf by 2022, which is consistent with previous demand forecasts in this study.



Photo Courtesy of City of Spruce Grove, 2017

FIGURE 6.1  
CONSUMER SURVEY RESPONDENT RESIDENT ORIGIN



# 6 CONSUMER INTERCEPT SURVEY

(from 2015 Retail Gap Analysis Study)

## 6.1 INTRODUCTION

As an integral part of the Retail Market & Gap Analysis, a Consumer Intercept Survey was conducted in which the residents of Spruce Grove and the surrounding communities were randomly interviewed. This study is utilizing the results of this consumer survey originally conducted and prepared in 2015.

Respondents were interviewed at strategic locations (Century Crossing, Tri Leisure Centre and Queen Street Professional Building) in the community to ascertain their preferences for merchandise categories/store types and retailers in the City of Spruce Grove. 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.

This survey represented a third such survey, which followed two other consumer intercept surveys conducted for the City of Spruce Grove by Keyfax Market Research in 2010 and 2012.

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

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

## 6.2 RESPONDENT DEMOGRAPHICS

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

An important component to determining and validating the Retail Market & Gap Analysis quantification is ensuring that a representative sample of the trade area is interviewed. **Figure 6.1** illustrates the breakdown of Respondent residences for the Consumer Intercept Survey, revealing 45% of respondents currently live in the City of Spruce Grove, with a further dispersed representation from surrounding towns and communities including 12% from Stony Plain, 17% from Parkland County and a further 26% from elsewhere in the region, as further illustrated in **Figure 6.2**.

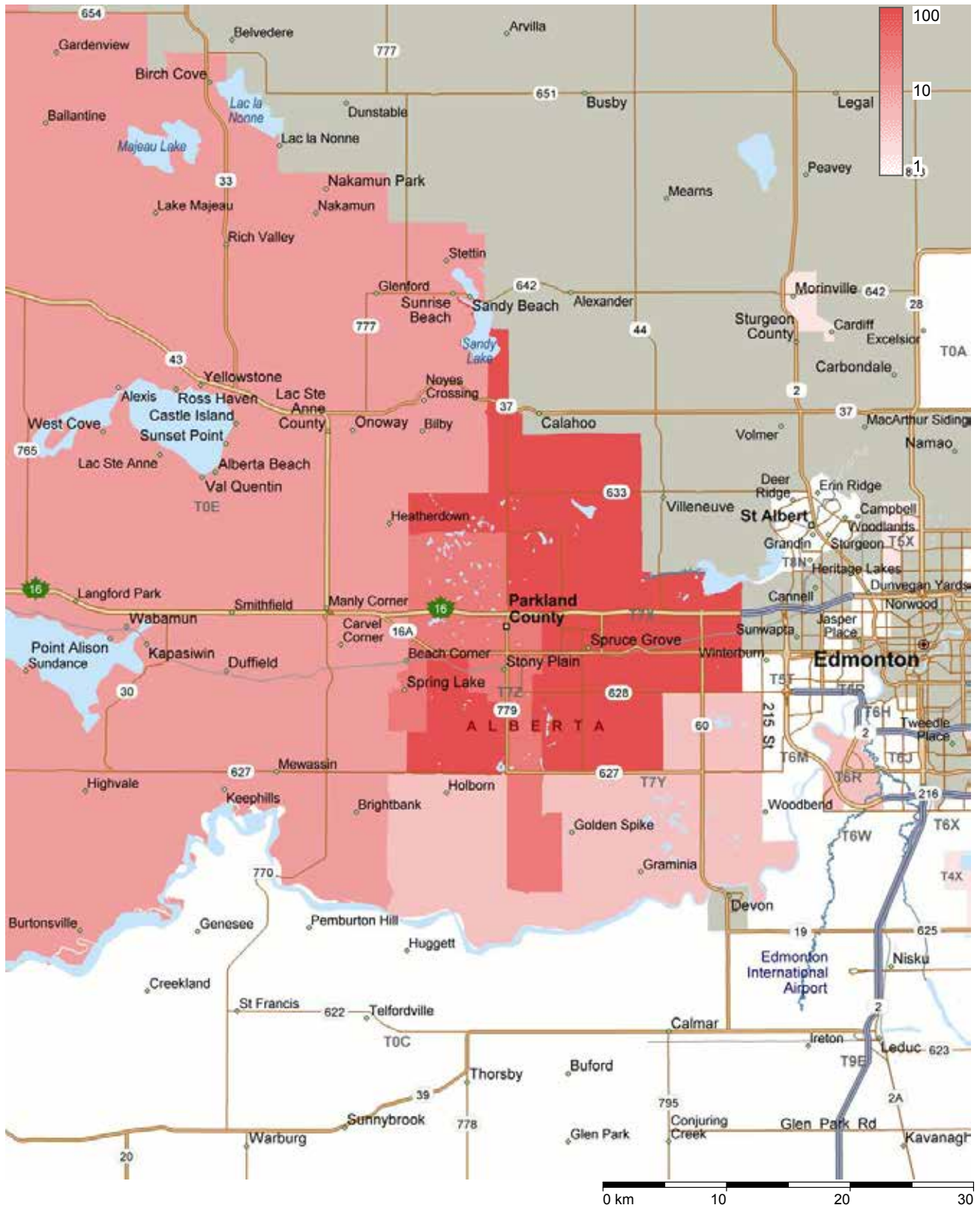
Furthermore, **Figures 6.2** in the form of a postal code "heat map" illustrates the density from which Survey Respondents originated.

**Figure 6.2** illustrates how the consumer survey informed the refinement of the Retail Trade Area as documented in **Figure 4.1**, in which the majority of patronage is sourced to the City and surrounding towns, but emanates to the west, with less dependence on populations to the east that are naturally closer to the City of Edmonton.

**Figures 6.3 & 6.4** provide a snapshot of the demographics of the respondents and further validate the statistical demographics by revealing a similar age profile dominated by the 25-44 year old age cohort. Furthermore, over 35% (38.3%) of the respondents have a household income of greater than \$100,000.

FIGURE 6.2

CONSUMER SURVEY RESPONDENT "HEAT MAP" BY POSTAL CODE (forward sortation area e.g. T8V)

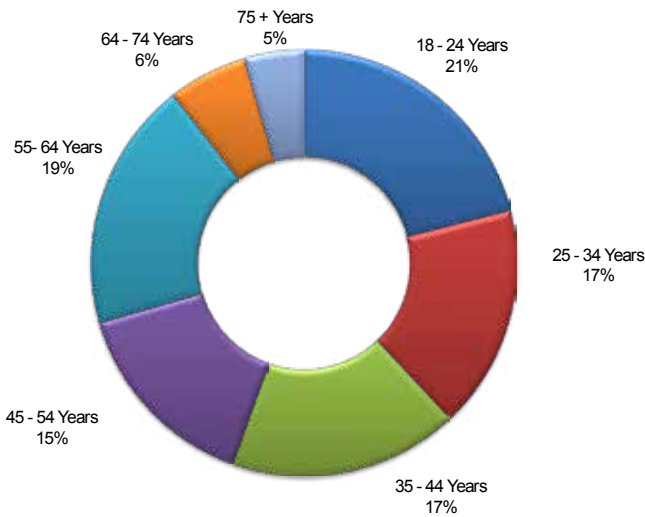


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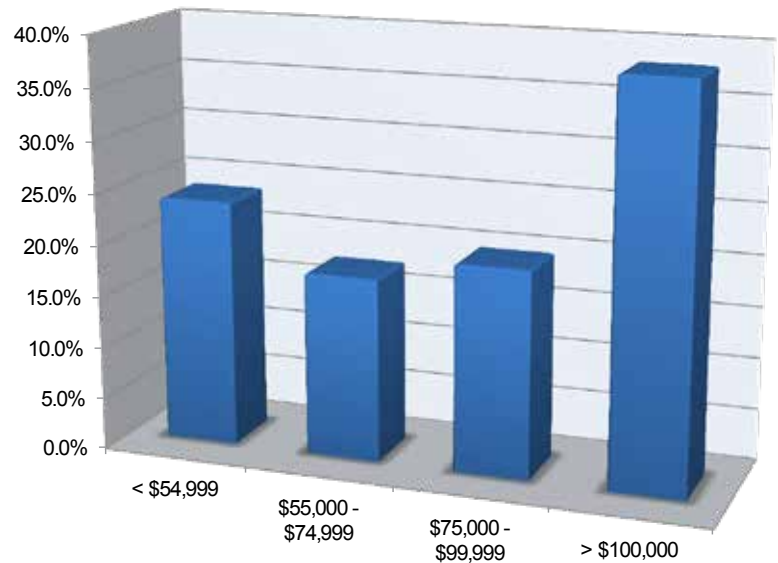


# 6

**FIGURE 6.3**  
**CONSUMER SURVEY AGE PROFILE**  
**ALL RESPONDENTS**



**FIGURE 6.4**  
**CONSUMER SURVEY INCOME PROFILE**  
**ALL RESPONDENTS**



## 6.3 PREFERRED SHOPPING LOCATIONS

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

- 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?

**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.

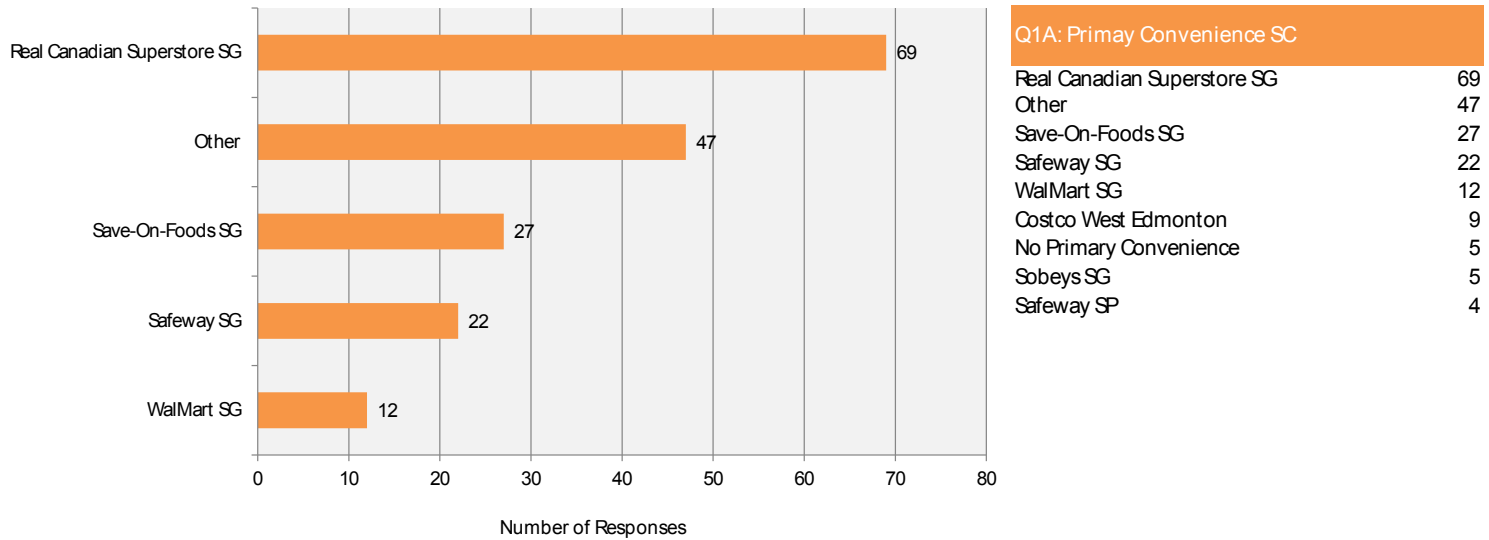
### *Primary Convenience Shopping Centre*

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

What is significant in this survey is the rise of Save On Foods as a primary convenience location, which is in response to its location at the Century Crossing Development. This pattern is likely to have continued and gain in resonance since 2015.

FIGURE 6.5

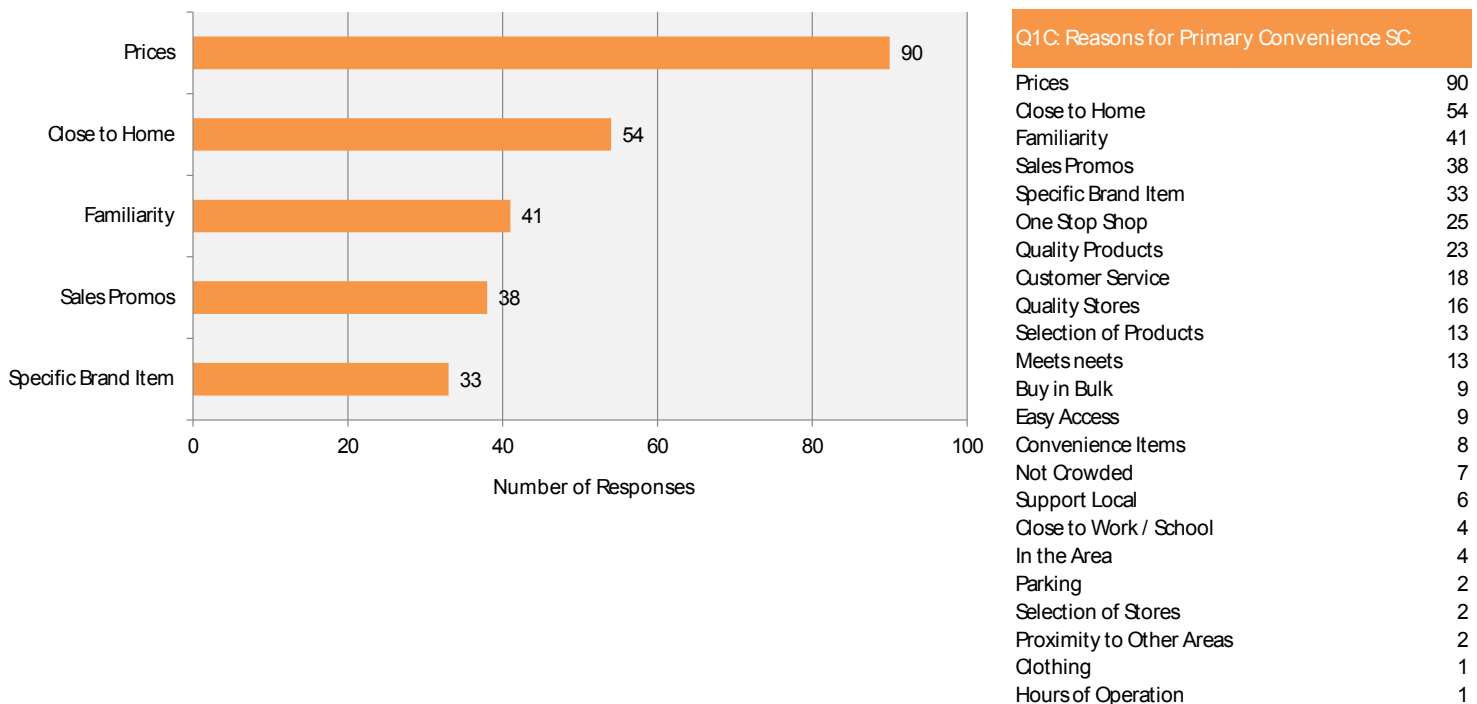
WHAT IS YOUR PRIMARY CONVENIENCE SHOPPING CENTRE?



Note: The category "Other" includes Freson's in Stony Plain as well as other convenience nodes in Stony Plain in addition to neighbourhoods in West Edmonton that have WalMart, Sobeys and Save-On-Foods (e.g. Grange & Lewis Estates Neighbourhoods).

FIGURE 6.6

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



# 6

## Primary Comparison Shopping Centre

**Figures 6.7 and 6.8** illustrate that West Edmonton Mall is the most dominant shopping centre followed by WalMart for consumers looking for comparison merchandise, such as Clothing, Footwear, Books, Electronics, House & Home etc.

In terms of the reasons for shopping at an identified Comparison shopping location, the selection of stores was identified, not surprisingly as to the preference to shop at West Edmonton Mall. This speaks to the desire to have a critical and mass and critical mix of retail offering, especially in the categories of Fashion.

The retail inflow and outflow identified previously clearly illustrates that consumers still have a strong desire to visit retail nodes outside of Spruce Grove for their Comparison merchandise, much less so than for Convenience goods and services.

Given the price consciousness of respondents, Spruce Grove could target price points and broader market appeal tenants. For example, tenants such as London Drugs, Old Navy, Value Village, Home Sense or JYSK who may have Spruce Grove on their radar, could be well-served to be presented with the opportunity, since neither of these has a store within an identifiable or comparable trade area.

The challenge for the majority of fashion retailers would be the requirement for an indoor retail space, such as that provided at West Edmonton Mall or the requirement for cotenancy of other complementary or competitive brands.

**Figure 6.12** illustrates a range of tenants that the City or its developers could target. While there are retailers that may not be a realistic fit for Spruce Grove, there are others whom respondents have indicated a preference to have in the City.

## 6.4

### DESIRED SHOPS & SERVICES

**Figures 6.9 through 6.12** illustrate the responses to questions that sought the following:

1. What Full-Service Restaurants do you want to see in Spruce Grove? (**Figure 6.9**)
2. What Limited-Service Restaurants do you want to see in Spruce Grove? (**Figure 6.10**)
3. What Retail Stores do you want to see in Spruce Grove? (**Figure 6.11**)
4. What types of stores do you want to see in Spruce Grove? (**Figure 6.12**)

Referring to **Figure 6.11**, which allows for multiple responses, respondents overwhelmingly want to see more Full-Service Restaurants (214 responses) and Clothing & Footwear (134 responses) in Spruce Grove. An increase in the quality and quantity of the above two categories would be well-received by the respondents and overall trade area residents.

Similarly, Costco was singled out the most cited non-food & beverage retailer desired in Spruce Grove. Costco is still considered to be a high priority and desirable tenant for Spruce Grove.

In response to the desire to see more Full-Service Restaurants (i.e. those with table service) in Spruce Grove, **Figure 6.9** specifically asked respondents for tenant names.

FIGURE 6.7

WHAT IS YOUR PRIMARY COMPARISON SHOPPING CENTRE?

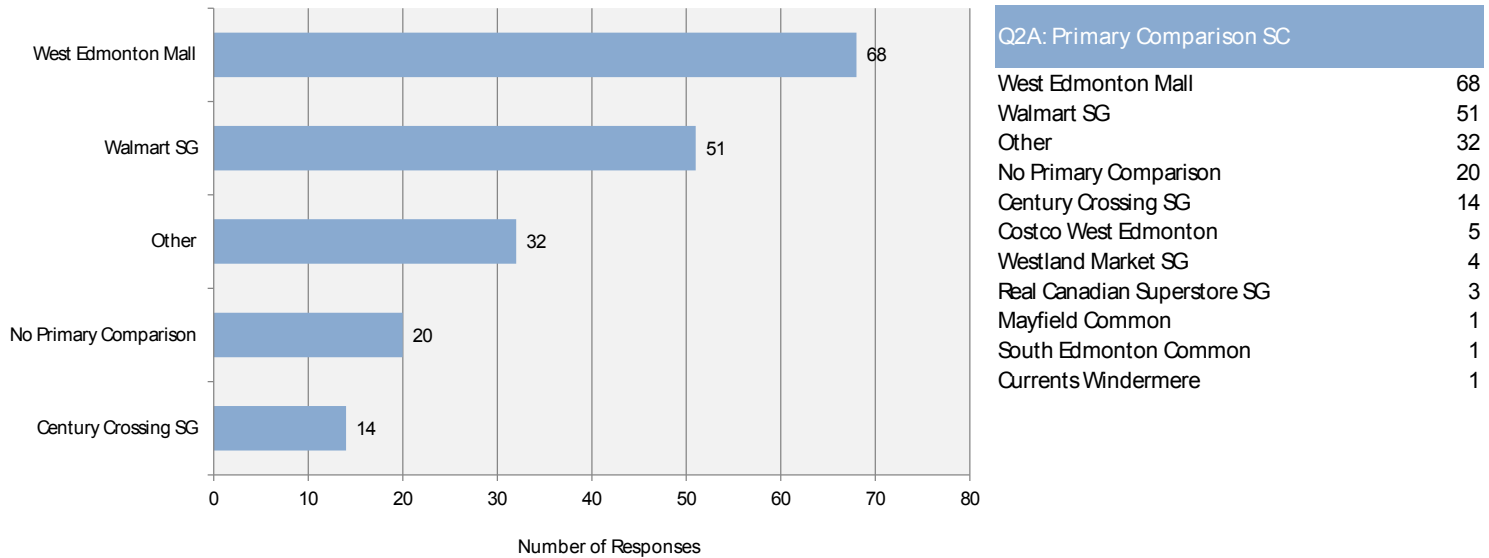
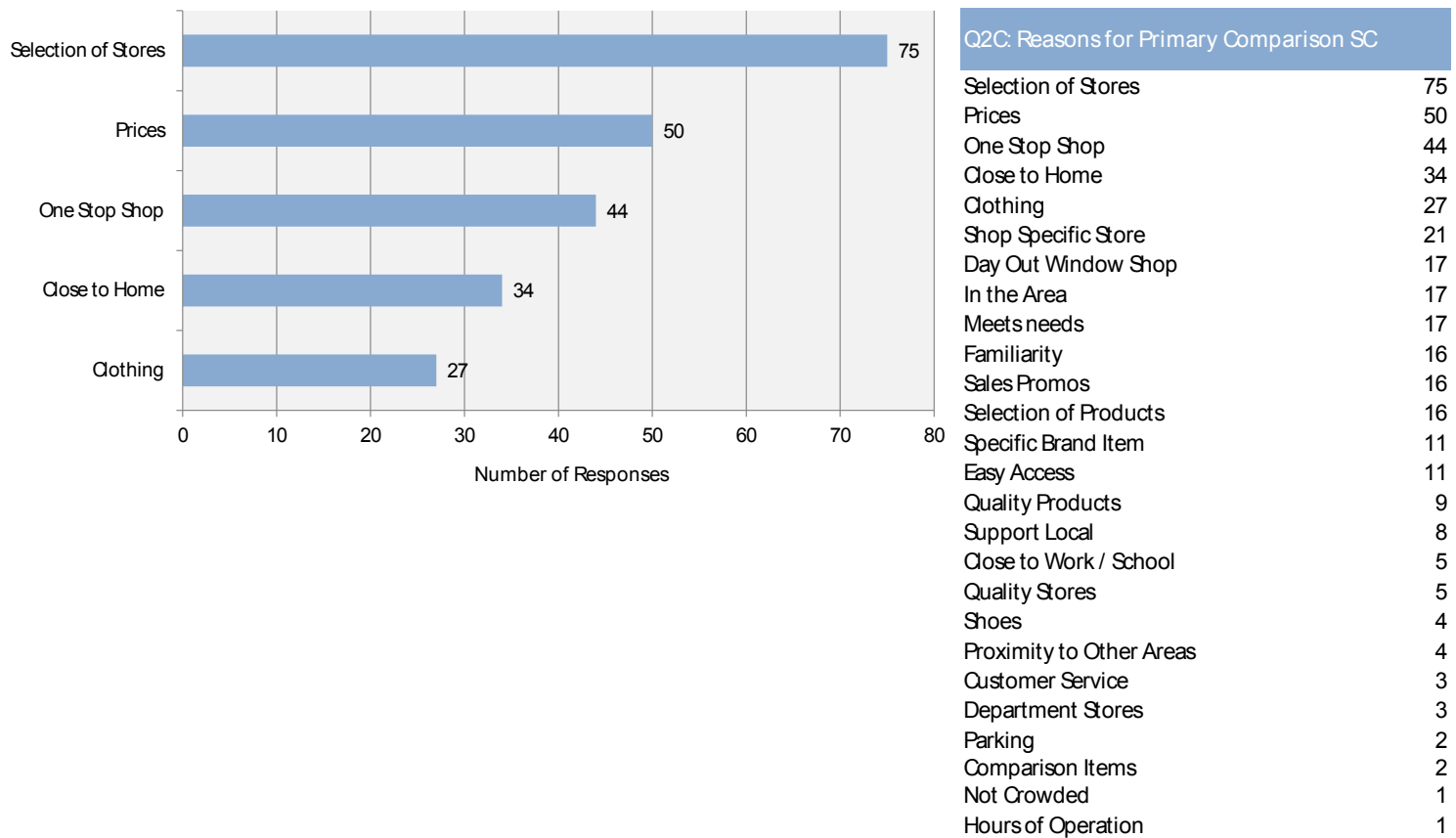


FIGURE 6.8

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



# 6

This question elicited a significant responses for the following top Restaurants:

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

Full-Service Restaurants such as those identified are most likely to locate in high customer traffic and popular shopping areas and as such Century Crossing or Westgrove.

Ethnic Restaurants were also noted quite highly by respondents as desired in the City. It is these types of restaurants that could be most compatible in City Centre.

Spruce Grove's location along a well-travelled highway and as a "pit stop" has a strong contingent of Limited Service Restaurants (i.e. those without table service). As such, Limited Service Restaurants weren't overly sought after by respondents with the exception of having another Tim Hortons in the community.

As documented in **Figure 6.10**, cafes and coffee shops continue to be in high demand with optimal locations available throughout the City and with a particular void of such establishments in the City Centre itself.

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

**Figure 6.11** illustrated a desire to have many formats that would be junior box or larger in size, but would build off of the momentum of similarly sized formats at Century Crossing.

Specifically, the Top 5 tenants identified as sought after stores (excluding F&B) included

1. Costco
2. **\*\*Future Shop/Best Buy** (*Note: This survey was conducted before the announcement that Future Shop would close all its locations*).
3. **\*\*Carter's** (*which has since located in Spruce Grove*)
4. Toys R Us (*corporate restructuring may not make this tenant feasible, however others such as Mastermind Toys and Buy Buy Baby would be suitable for Spruce Grove*)
5. Cabelas (*corporate acquisitions of Cabela's by Bass Pro Shops in early 2017 have slowed Canadian expansion plans and the location at Windermere may limit locational decision-making pertinent to Spruce Grove*)

The significance of these responses is that they reflect a strong correlation with the younger demographic and family profile of the City and Retail Trade Area and nonetheless are indicative at least of the types of categories that consumers are wanting in Spruce Grove.

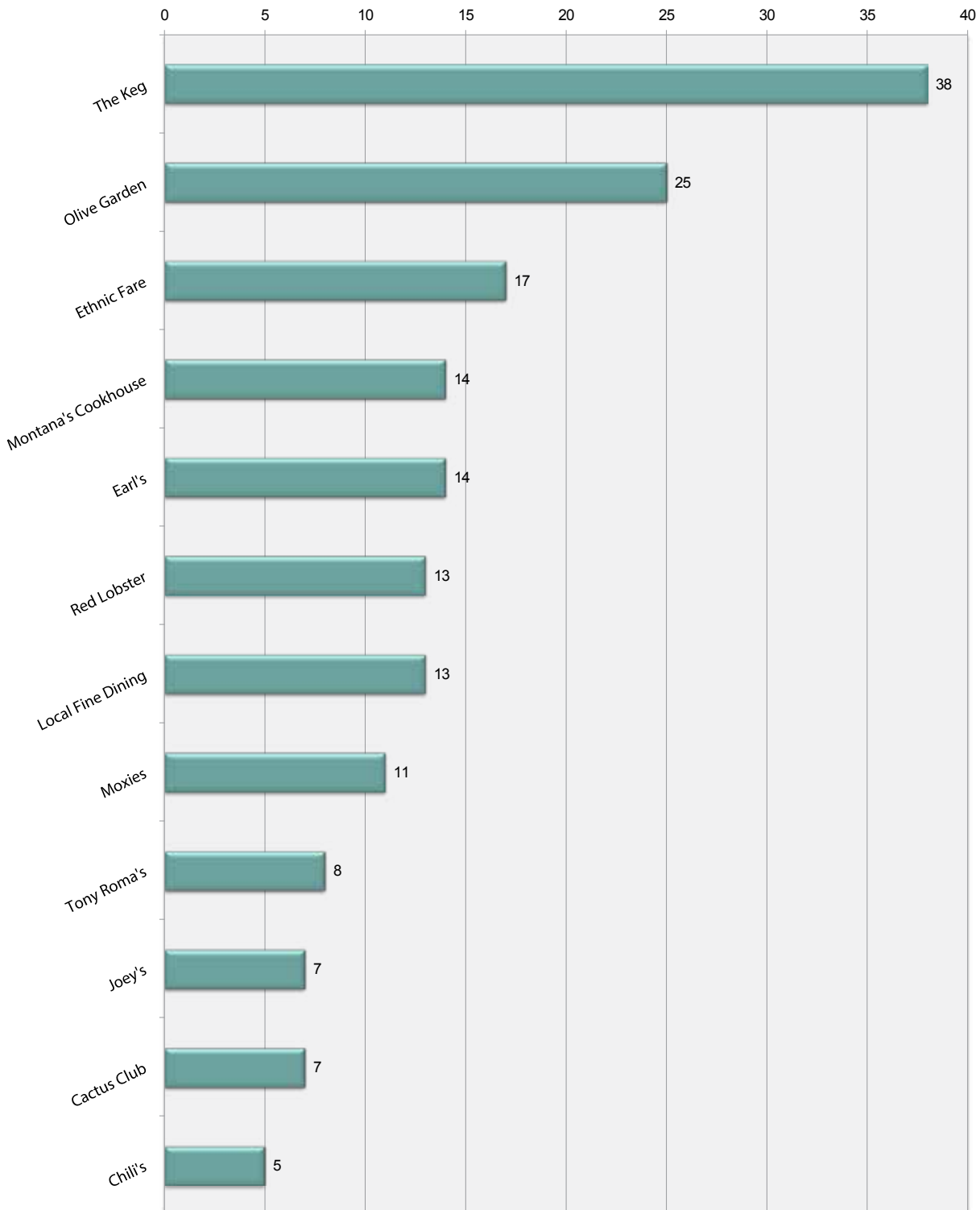
## 6.5

### ALL RESPONDENTS SPENDING VERSUS IMPORTANCE

**Figures 6.13 to 6.18** 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 Residence and Age Cohort.

FIGURE 6.9

WHAT FULL-SERVICE RESTAURANTS DO YOU WANT TO SEE IN SPRUCE GROVE?



# 6

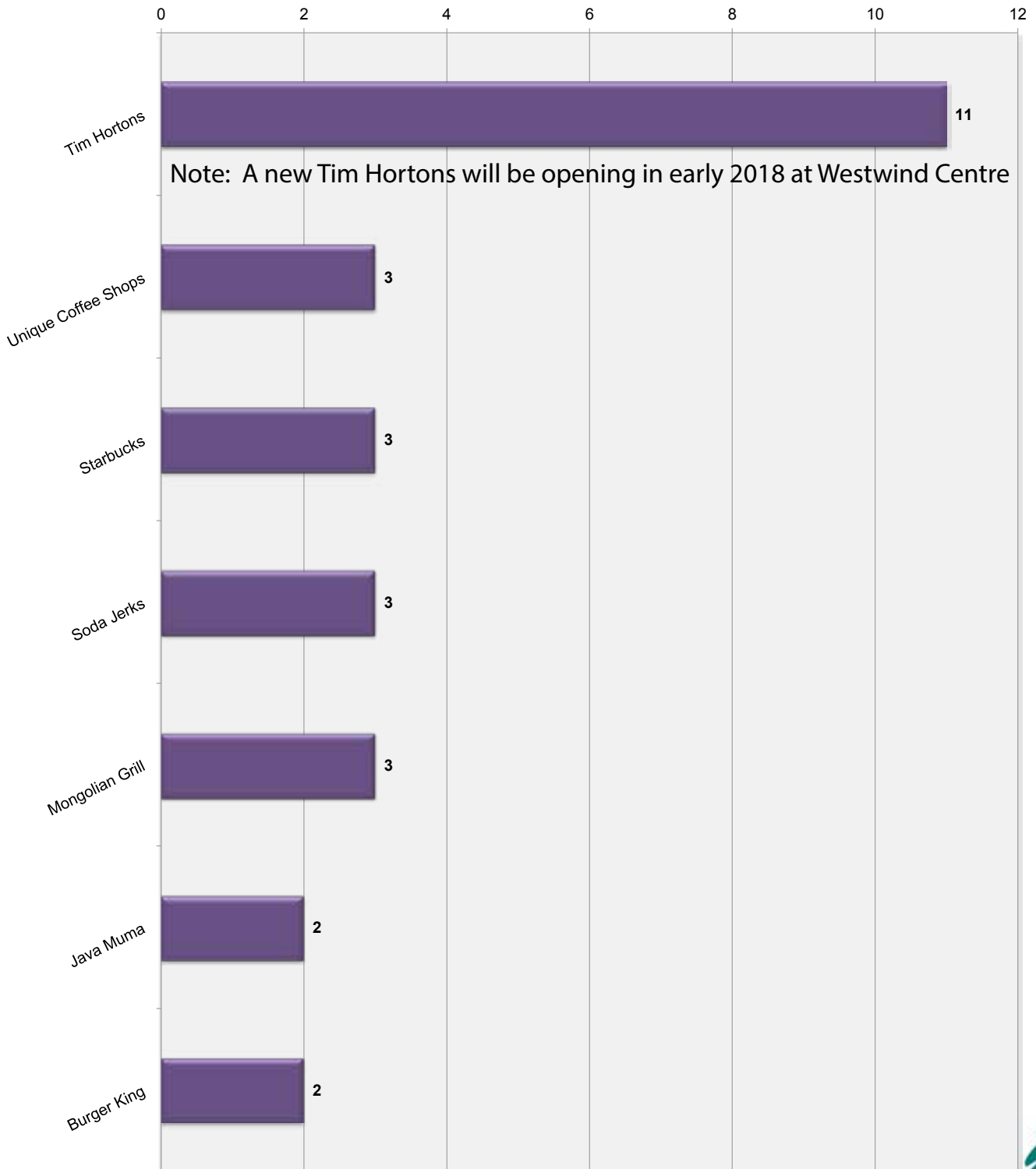
fact

Tim Hortons

Most cited Limited Service Restaurant desired by Survey Respondents

FIGURE 6.10

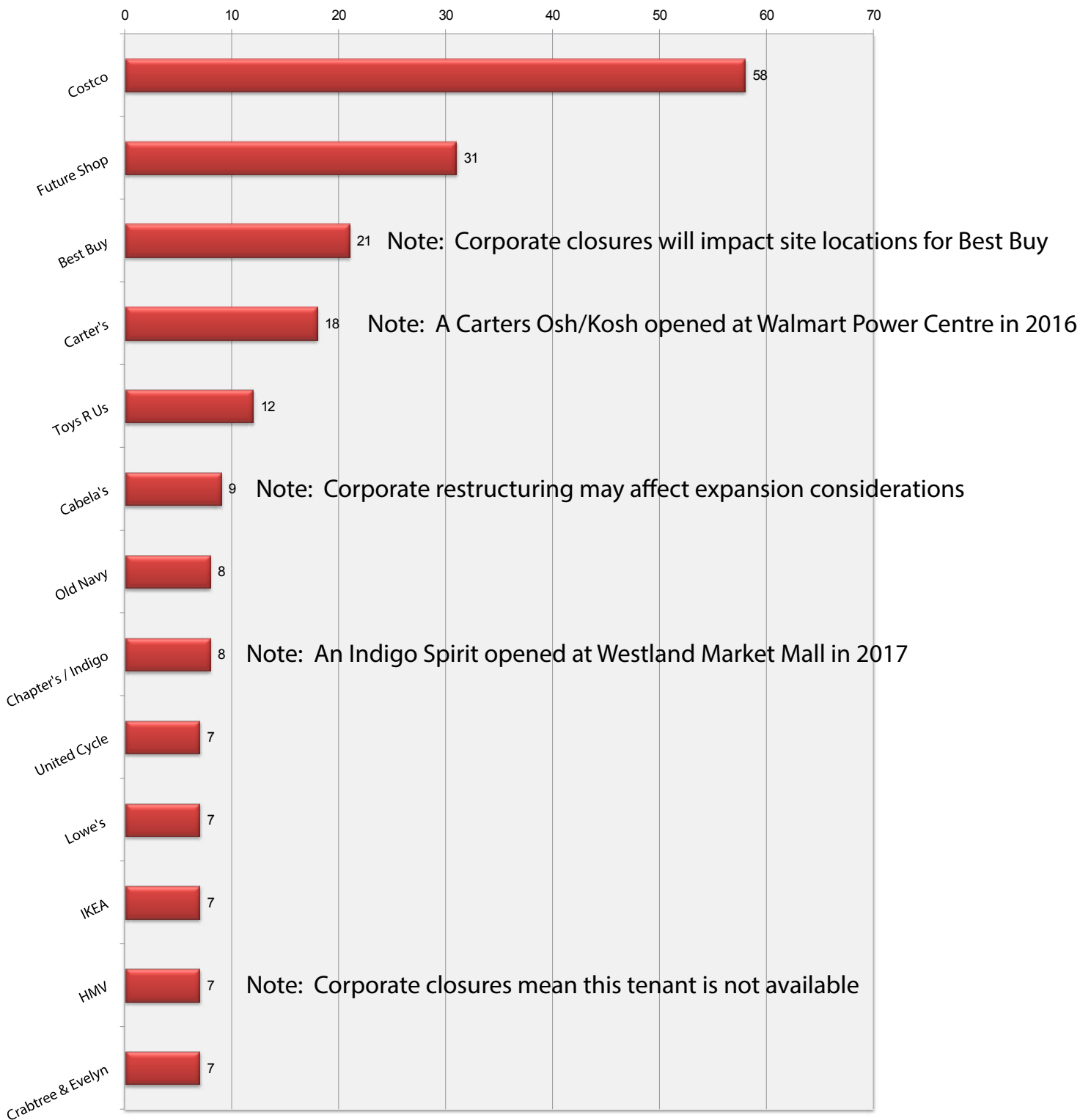
## WHAT LIMITED-SERVICE RESTAURANTS DO YOU WANT TO SEE IN SPRUCE GROVE



Most cited non F&B retailer desired by Survey Respondents

FIGURE 6.11

WHAT RETAIL STORES DO YOU WANT TO SEE IN SPRUCE GROVE?





# 6

**FIGURE 6.12**  
**WHAT TYPES OF STORES DO YOU WANT TO SEE IN SPRUCE GROVE?**

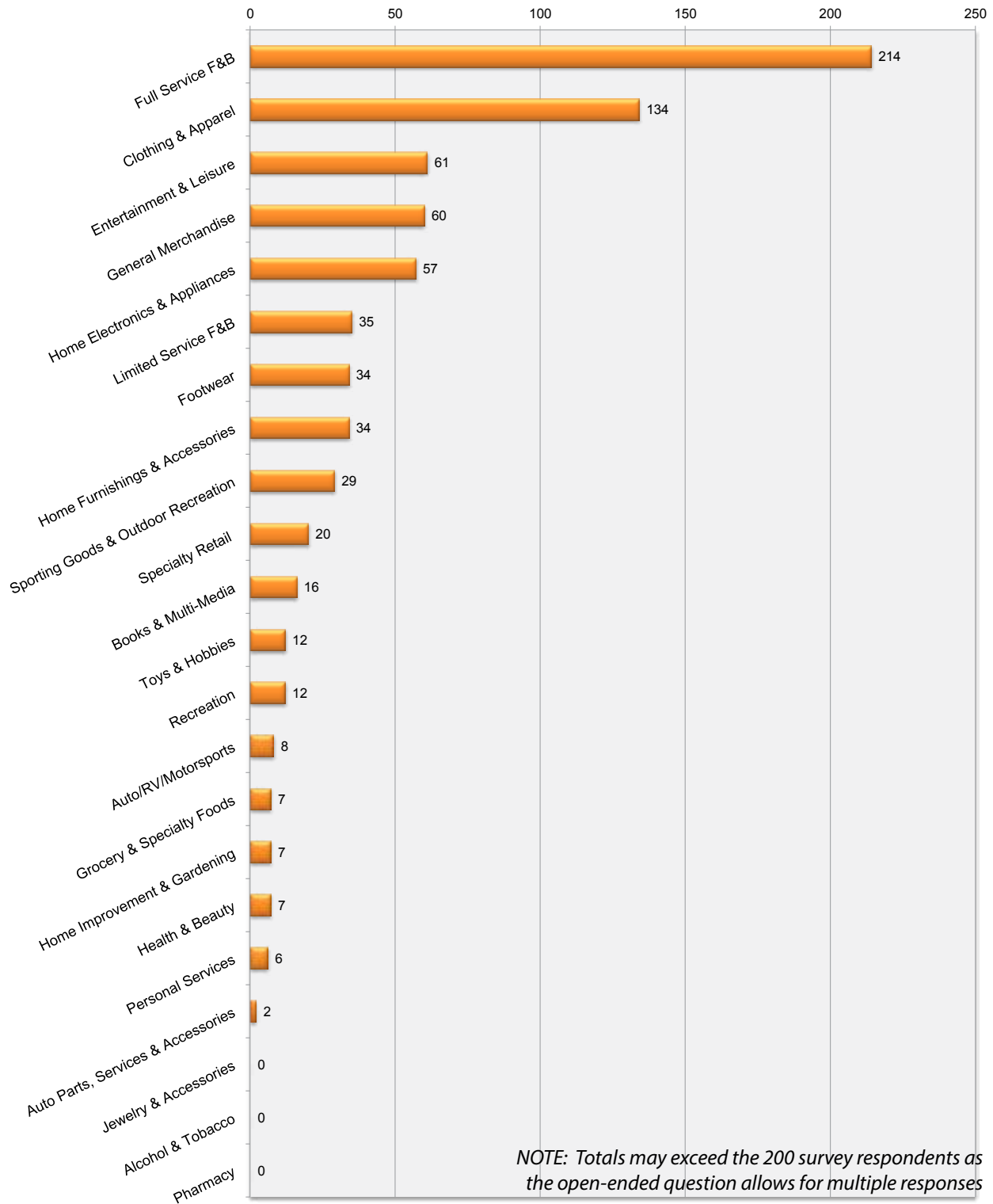


FIGURE 6.13

SPENDING VERSUS IMPORTANCE RATINGS FOR ALL RESIDENT RESPONDENTS

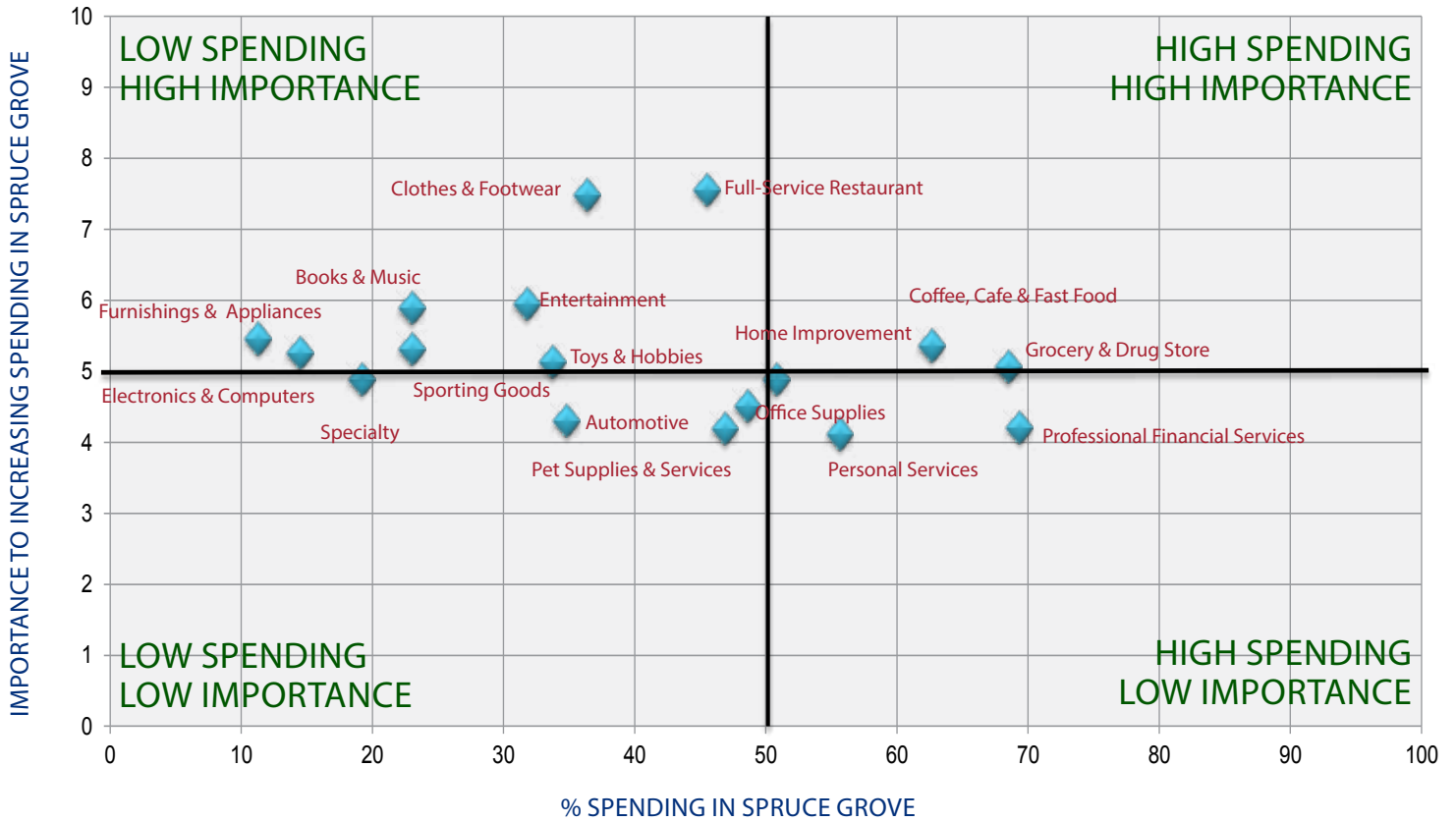
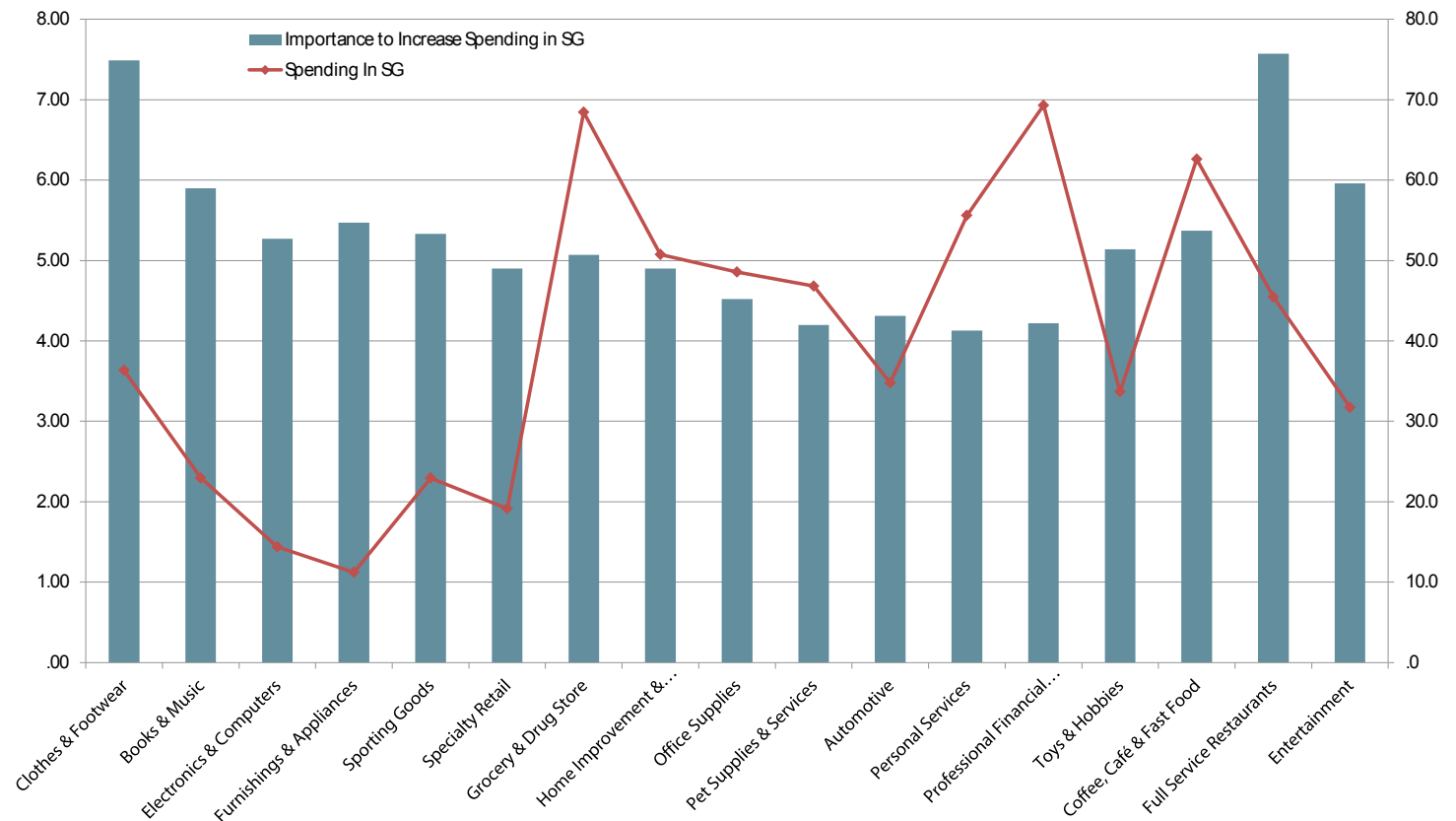


FIGURE 6.14

SPENDING VERSUS IMPORTANCE RATINGS FOR ALL RESIDENT RESPONDENTS



# 6

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

The results shown diagrammatically in **Figures 6.13 & 6.14** shows that the categories of Grocery & Drug Store and Professional Services have the highest proportion of spending inside Spruce Grove, while those with the highest level of importance to increasing spending are Clothes & Footwear and Full Service Restaurants.

The graph charts depict a trend whereby those categories that have an importance rating higher than 6 are flagged as being potential categories. Similarly, those categories that indicate a lower spending in Spruce Grove below that of 50% are also flagged. The result is a so-called "hot-zone" that would fall in the Low Spending - High Importance quadrant. These represent most commonly the categories where leakage or outflow is occurring.

## 6.6 RESPONDENT CROSS-TABULATIONS OF SPENDING VERSUS IMPORTANCE

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

### *Spending & Importance By Respondent Residence*

#### ***Spruce Grove Residents***

In **Figure 6.15** Spruce Grove's residents indicate that Clothes & Footwear and Full Service Restaurants are the most important retail category to increasing their spending in Spruce Grove. Other categories which fell in the low spending and high importance quadrant included Entertainment, Toys & Hobbies, Books & Music, Home Electronics and Home Furnishings.

#### ***Stony Plain Residents***

Stony Plain residents, most likely because they do not have the options in their own town rated Clothing & Footwear, Full Service Restaurants and Entertainment as the most important factor which could lead to increased spending in Spruce Grove (**Figure 6.16**). Other categories which fell into the low spending/high importance quadrant included Sporting Goods and Books & Music.

#### ***Parkland County Residents***

In **Figure 6.17** Parkland County residents, as with the other residents rated Clothes & Footwear along side Full Service Restaurants as the most important categories which could be provided that would lead to increased spending in Spruce Grove.

Parkland County residents indicate a relatively high degree of importance on providing a wide range of shops and services to increase their spending in Spruce Grove. As such, categories that fell within the low spending/high importance quadrant included Home Furnishings, Home Electronics, Sporting Goods, Specialty Retail, Entertainment and Books & Music.

FIGURE 6.15

SPENDING VERSUS IMPORTANCE RATINGS FOR SPRUCE GROVE RESIDENTS

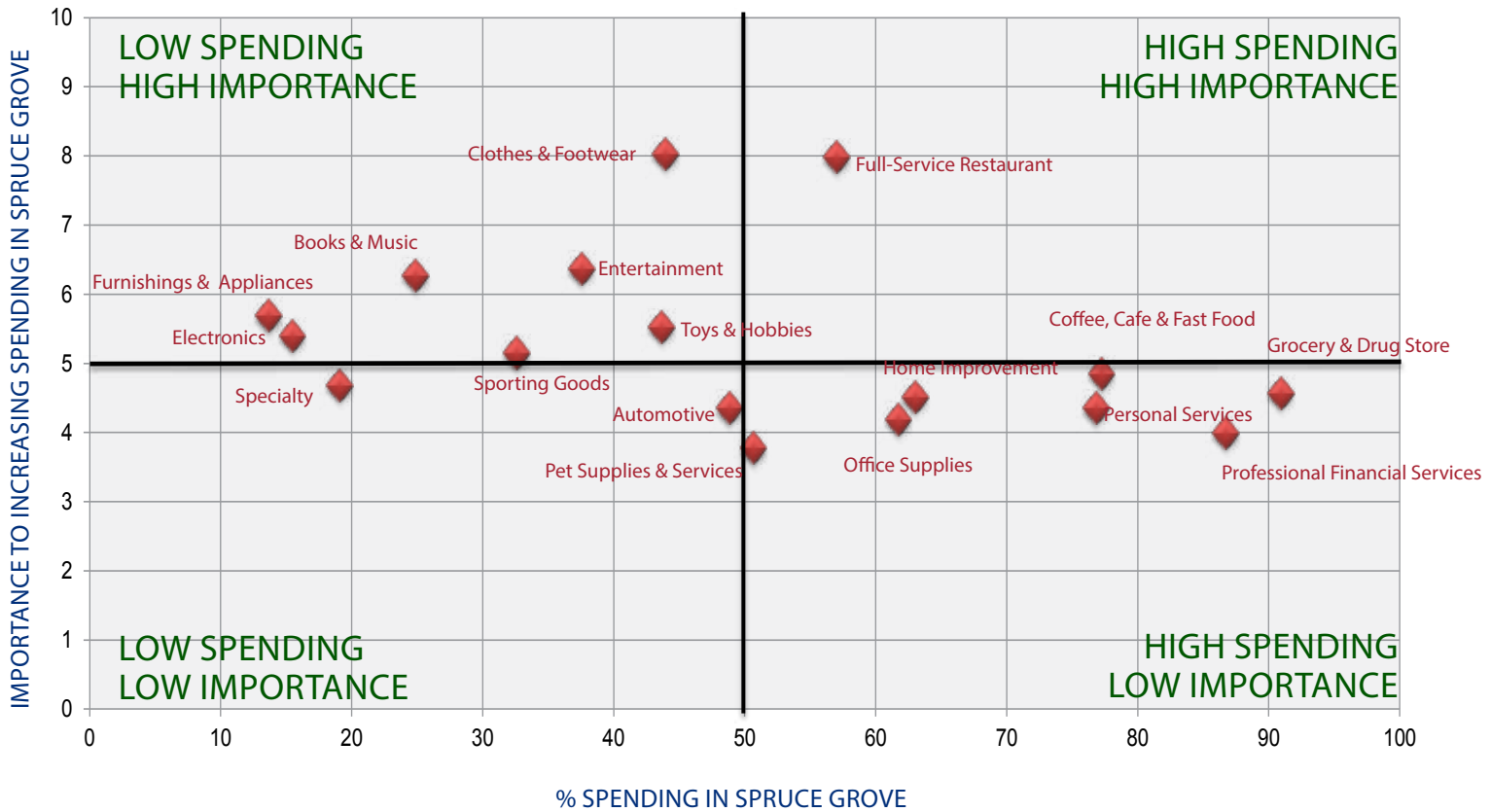


FIGURE 6.16

SPENDING VERSUS IMPORTANCE RATINGS FOR STONY PLAIN RESIDENTS

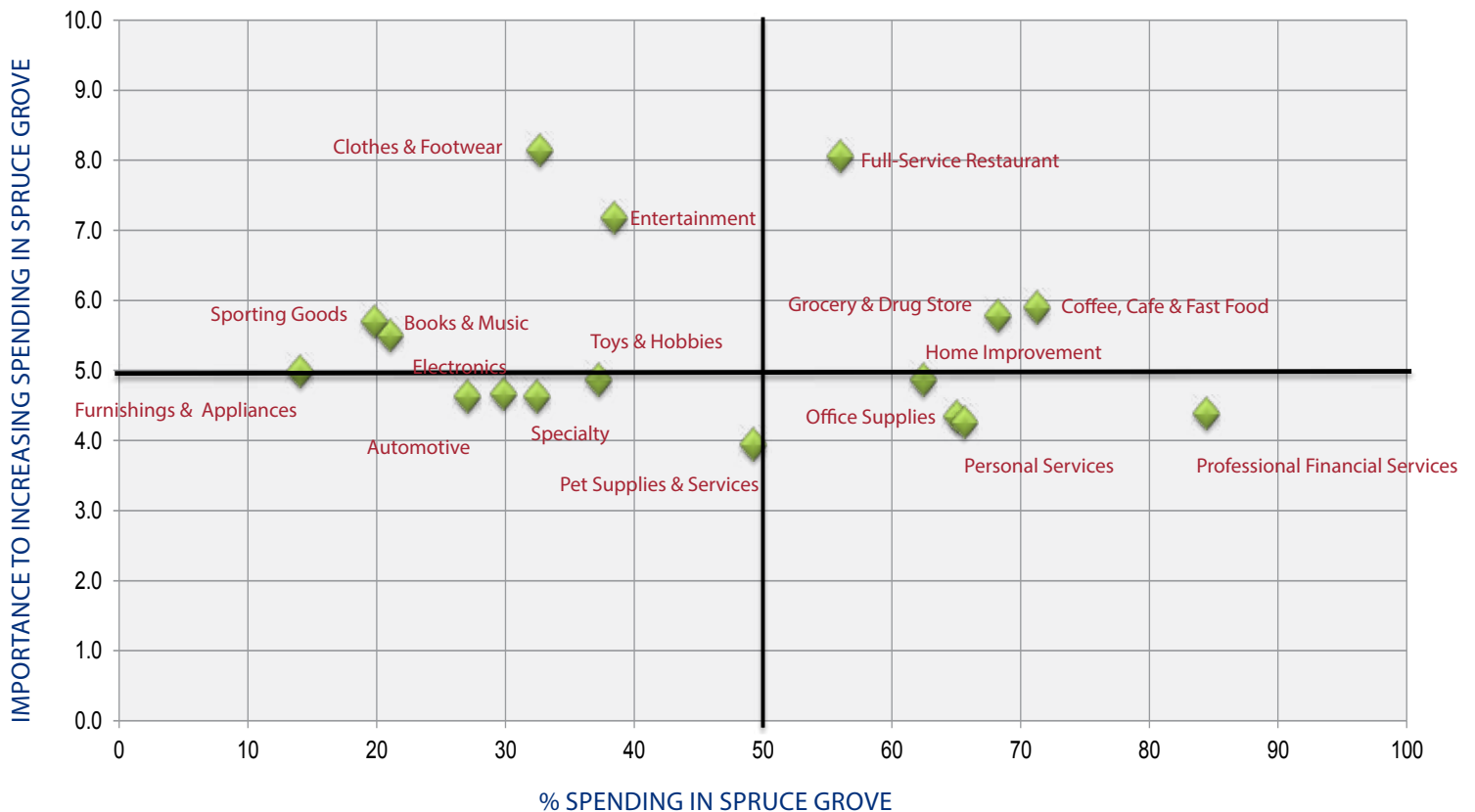


FIGURE 6.17

SPENDING VERSUS IMPORTANCE RATINGS FOR PARKLAND COUNTY RESIDENTS

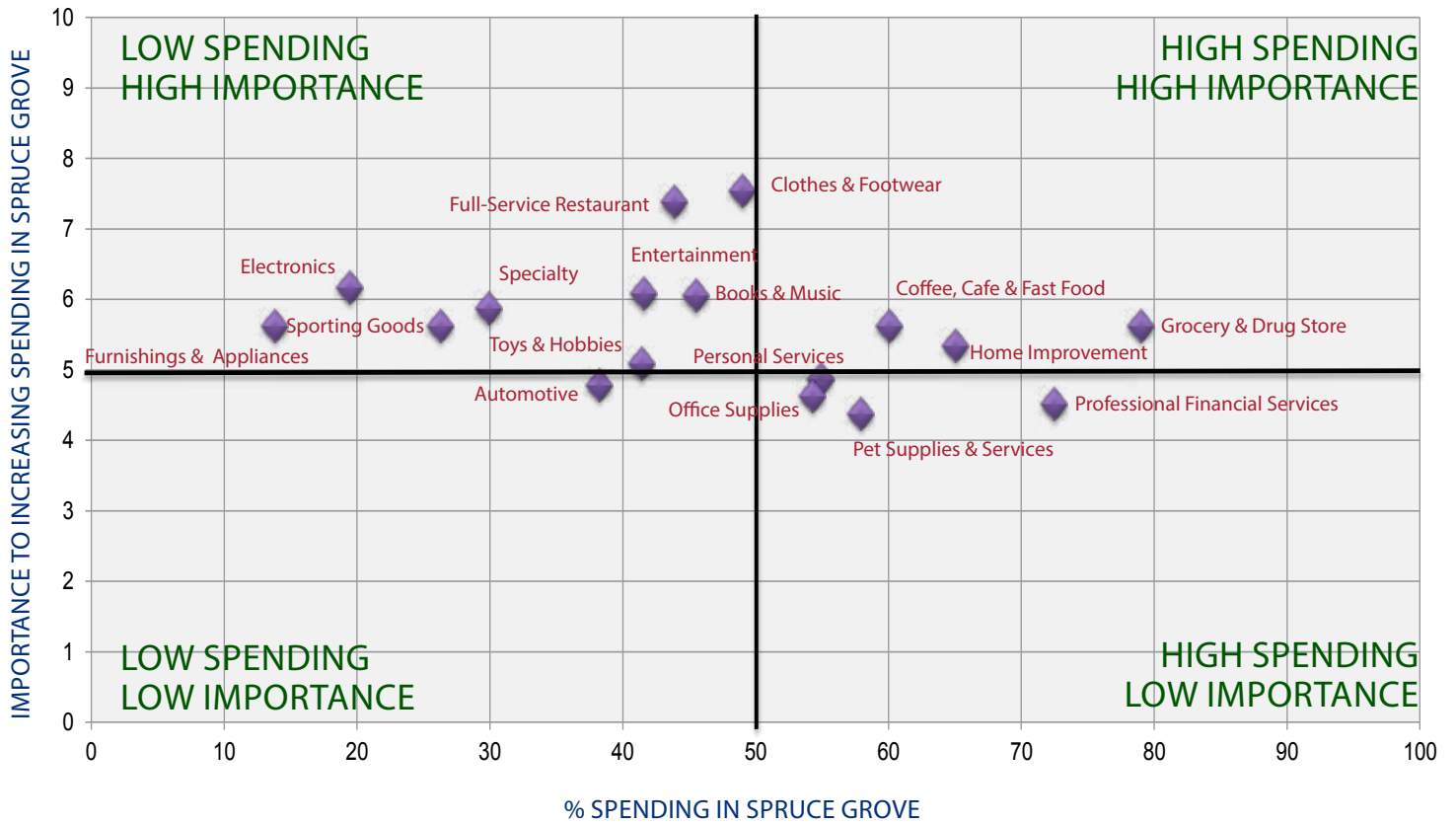


FIGURE 6.18

SPENDING VERSUS IMPORTANCE RATINGS FOR OTHER RESIDENTS

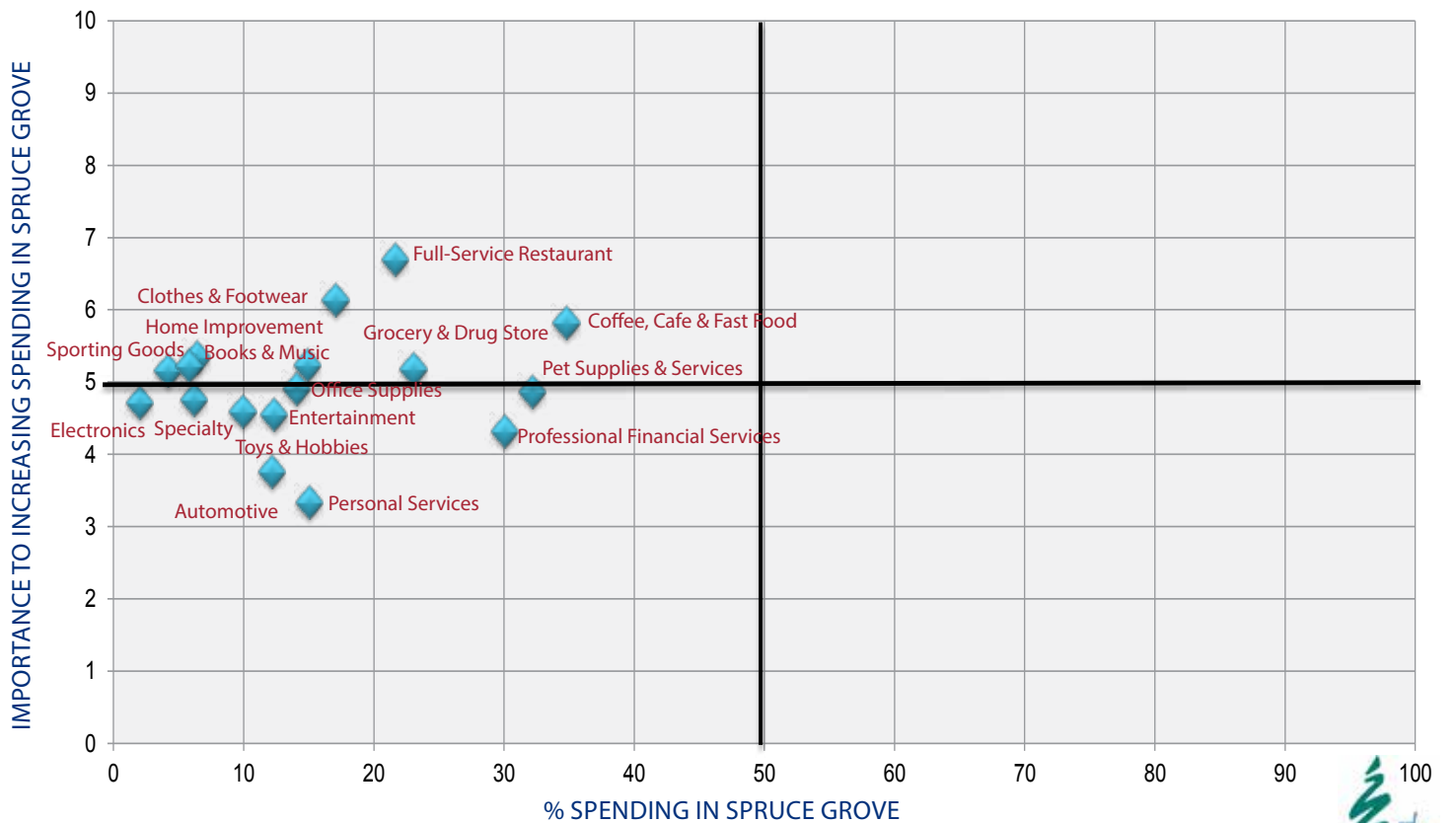


FIGURE 6.19  
 SPENDING VERSUS IMPORTANCE RATINGS BY AGE GROUP - 18 TO 34 YEARS

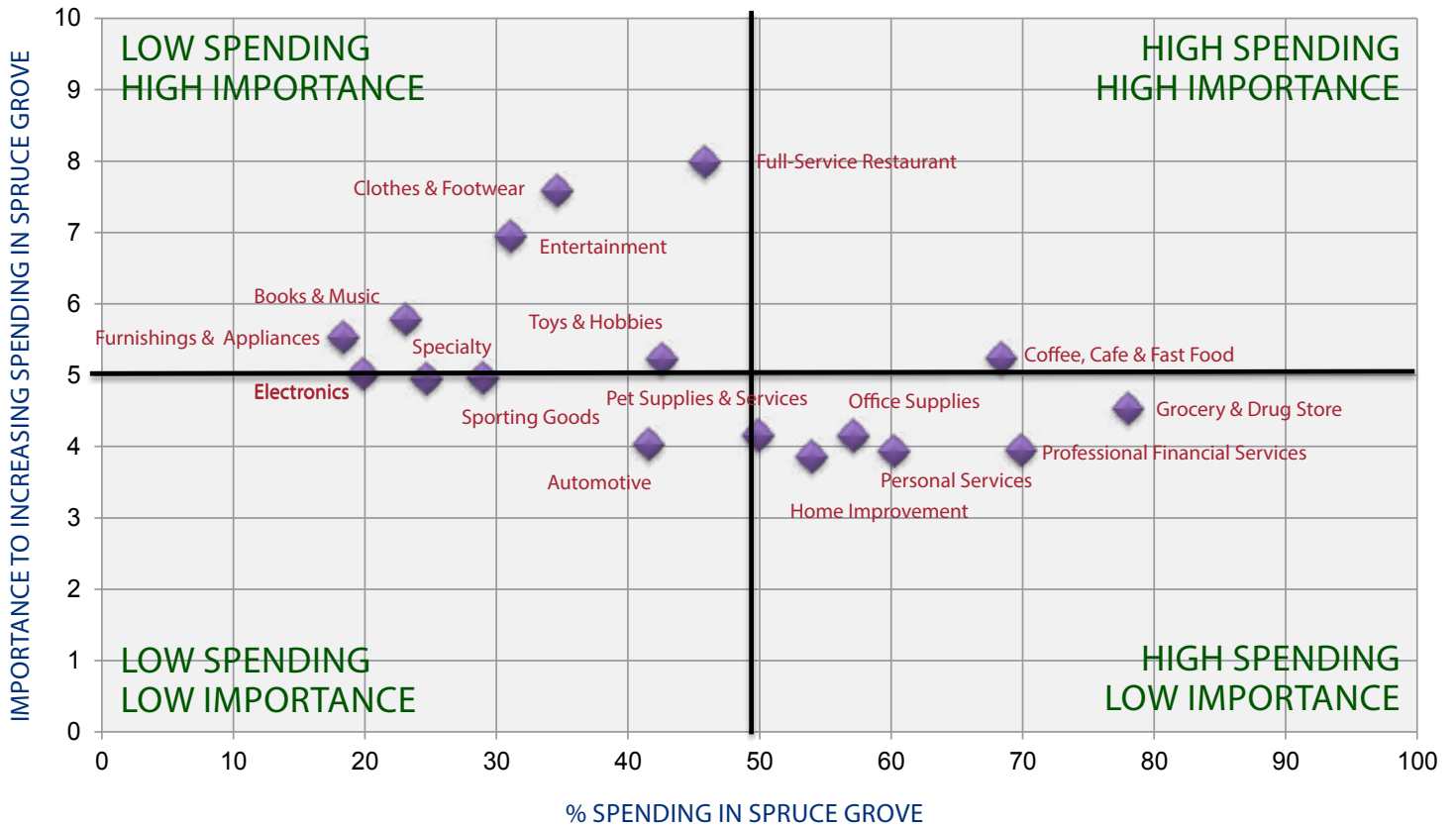
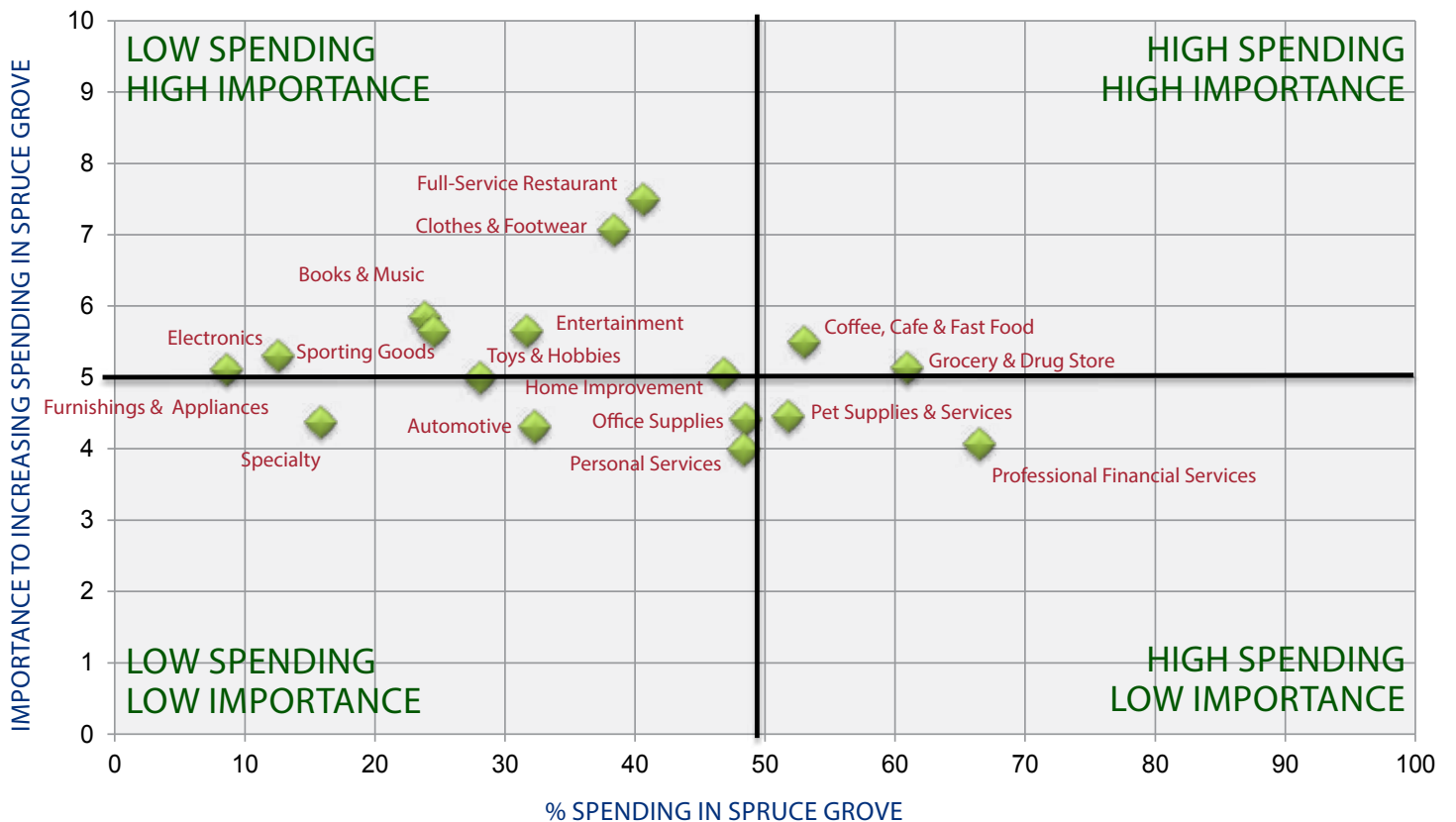


FIGURE 6.20  
 SPENDING VERSUS IMPORTANCE RATINGS BY AGE GROUP - 35 -54 YEARS



# 6

While Spruce Grove residents did indicate a desire for specific categories that would increase their spending it would seem that they still have a relative comfort to travel into Edmonton, whereas the Parkland County residents have less desire to drive into Edmonton and would rather shop in Spruce Grove.

This is no to say Spruce Grove residents don't want the shops and services, but rather compared to Parkland County the level of importance other than for Full Service and Clothing is not as high in other categories such as Sporting Goods, Electronics and in particularly Specialty Retail.

## **Other Residents**

**Figure 6.18** shows how residents from areas outside of Spruce Grove, Stony Plain and Parkland County currently spend money in Spruce Grove and rate the importance of new additions. Overall, there is a relatively low level of importance across almost all categories, suggesting that residents from more remote areas of the trade area will not dramatically alter their shopping patterns if more offering is provided in Spruce Grove.

The only category that has a high enough level of importance to garner increased inflow from other residents would be Full Service Restaurants, which represent a desire to get out and about as a leisure activity.

## *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.

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

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

## **18 - 34 Years**

The young family demographic, aged 18-34 years, with emerging incomes and young families have the greatest desire to see more offering in the community as a way of retaining their spending. Moreover, it is this demographic age group that also has the largest representation in the trade and as such has the most aggregate spending power for retailers to tap into. Among all various cross-tabulations, the 18-24 year age cohort placed the most importance on Full Service Restaurants at a rating of 8 out of 10.

The desire to have more entertainment choices for this age group may come as a surprise given the fact the City has a multiplex cinema, but increasingly the younger demographic segments are looking for alternatives beyond cinemas, which could include activities like bowling or bars and nightclubs.

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

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

FIGURE 6.21  
SPENDING VERSUS IMPORTANCE RATINGS BY AGE GROUP - 55 PLUS YEARS

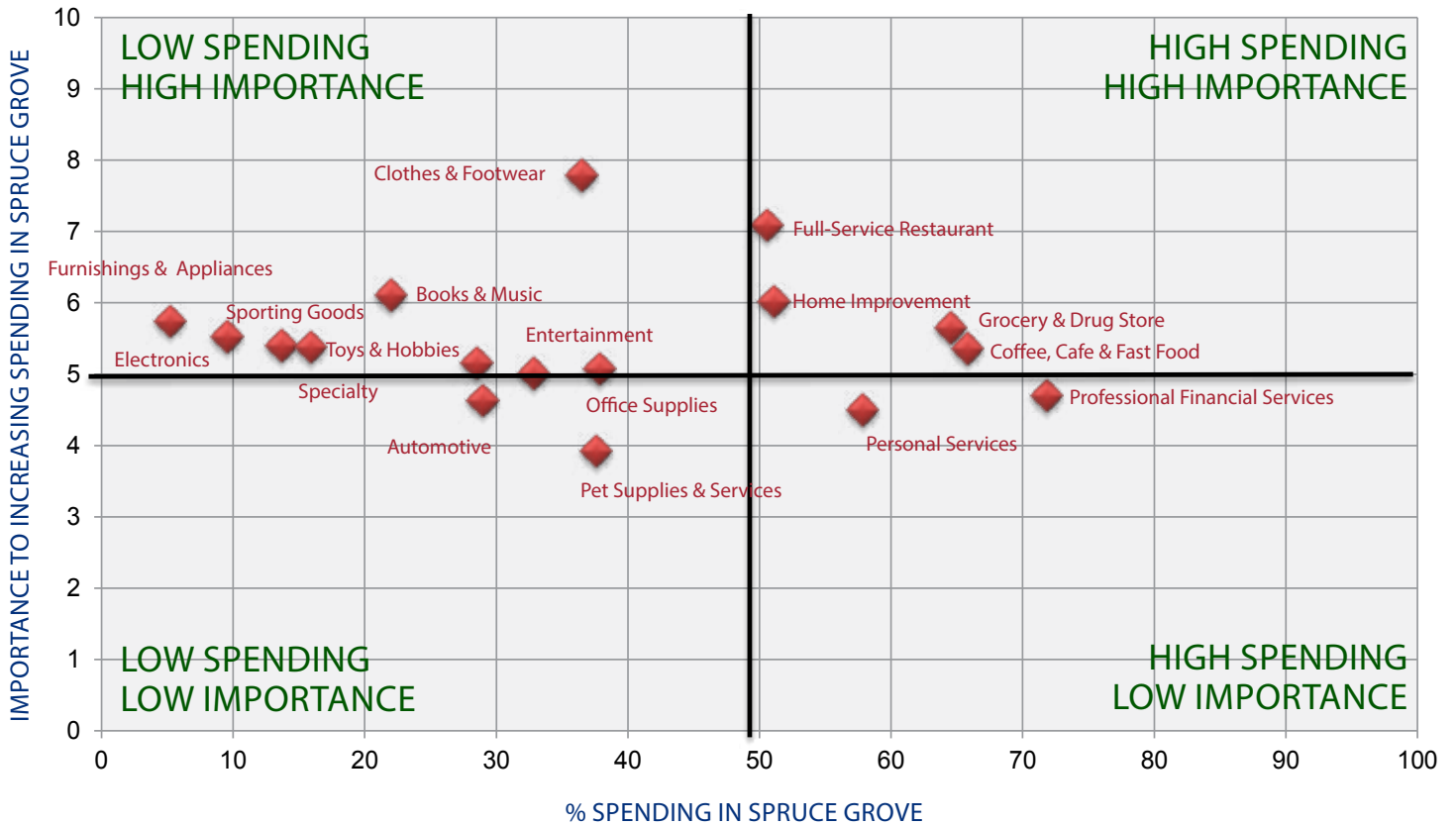
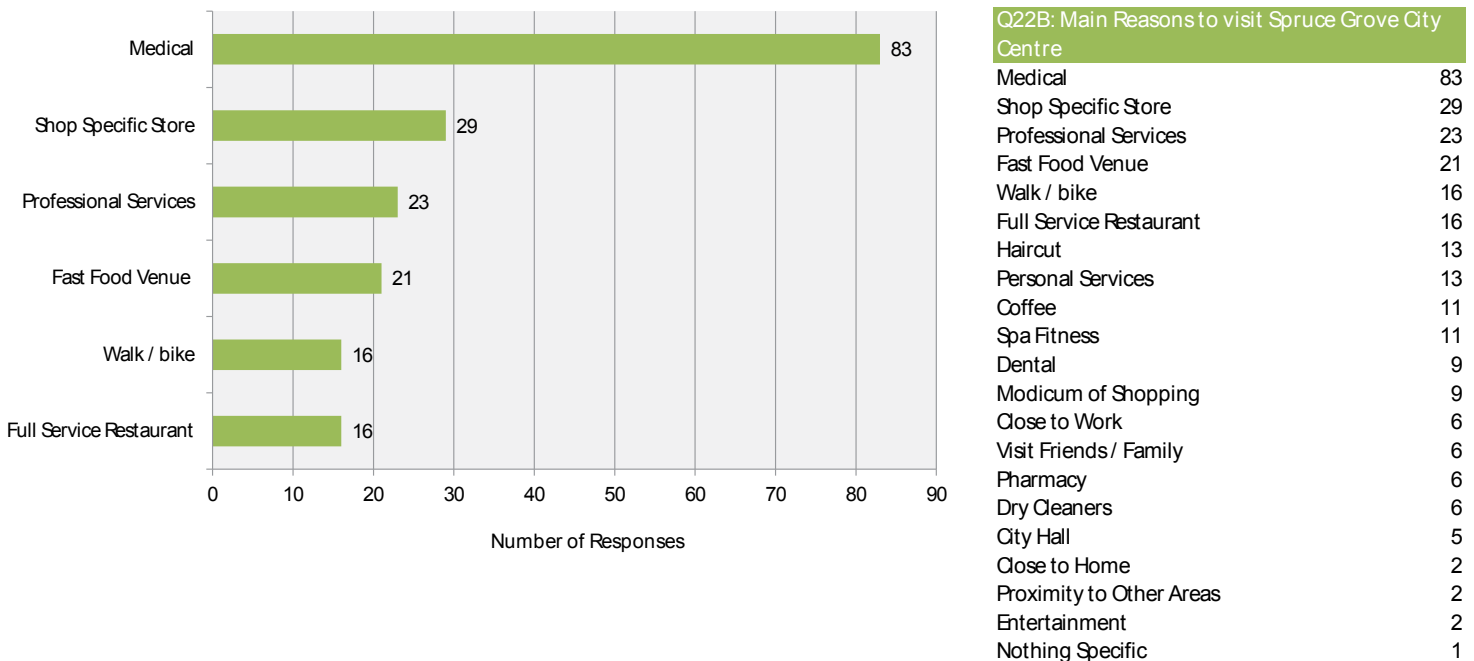


FIGURE 6.22  
RESPONDENT MAIN REASONS FOR VISITING SPRUCE GROVE'S CITY CENTRE





# 6

## 35 - 54 Years

This age group is the most mobile age group in terms of spending, which is likely why there is no overwhelming desire placed on categories other than Clothes & Footwear and Full Service Restaurants when it comes to adding shops and services. This age cohort whose younger children are more self dependent are prepared and often seek out opportunities outside of the city for their comparison merchandise.

## 55+ Years

In terms of spending retained inside Spruce Grove, the Baby Boomers or those 55 years and older have the strongest spending profile for categories such as Professional Services (legal and medical), and Full Service Restaurants. However, when looking at the importance of these same categories to increasing spending, the Baby Boomer segment does not place as high a value on these as do the emerging younger age cohorts.

In terms of garnering increased spending in Spruce Grove, the 55+ age group placed most importance on Clothes & Footwear, which sheds insight into the potential types of tenants that could cater to this age group. Moreover, while other age groups want more Full Service restaurants, the older age groups may not place this desire as high given that their spending in Spruce Grove for Restaurants is already the highest among all age groups.

While the Baby Boomers are a strong spending segment today, they are not the growth demographic in Spruce Grove, as evidenced by the average age at just over 33 years.

Moreover, this pattern suggests that the Baby Boomers are generally happy and satisfied with the offering in the City of Spruce Grove, while the emerging growth cohort are not as satisfied and are seeking new experiences and formats and are thus most likely to be the ones leaving Spruce Grove for items like Clothing and Restaurants.

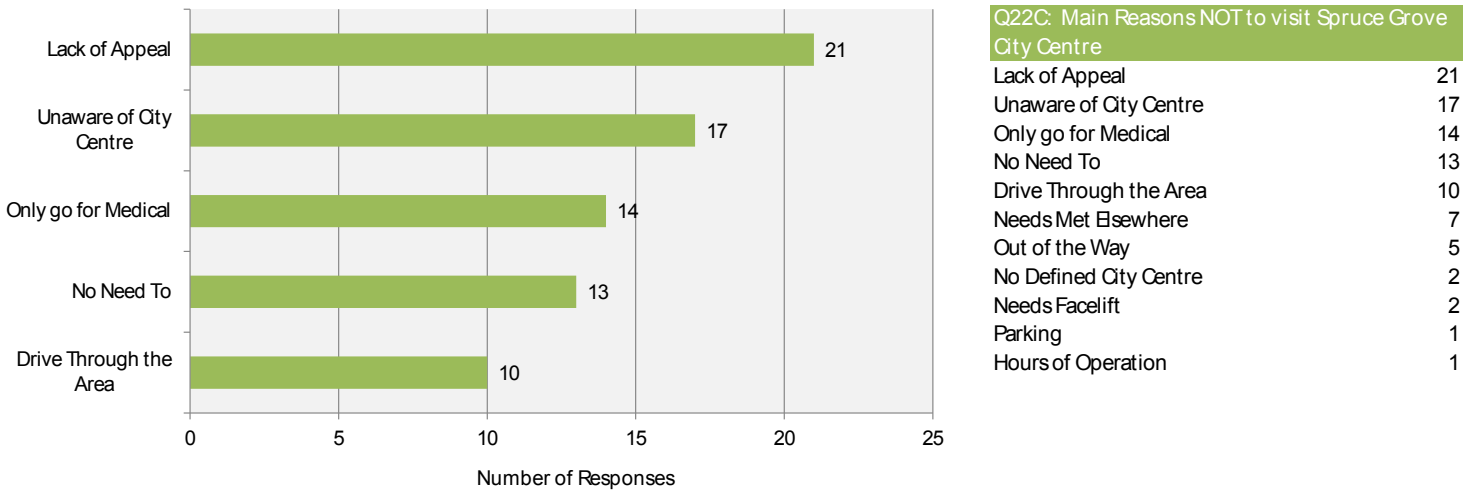
Retail spending has thus far catered more to the older demographic, but as the age profile illustrates, future emphasis should be geared toward the next generation of consumers who want to support the Spruce Grove local businesses, but equally are prepared to leave Spruce Grove for purchases.

## 6.7 CITY CENTRE PERSPECTIVES

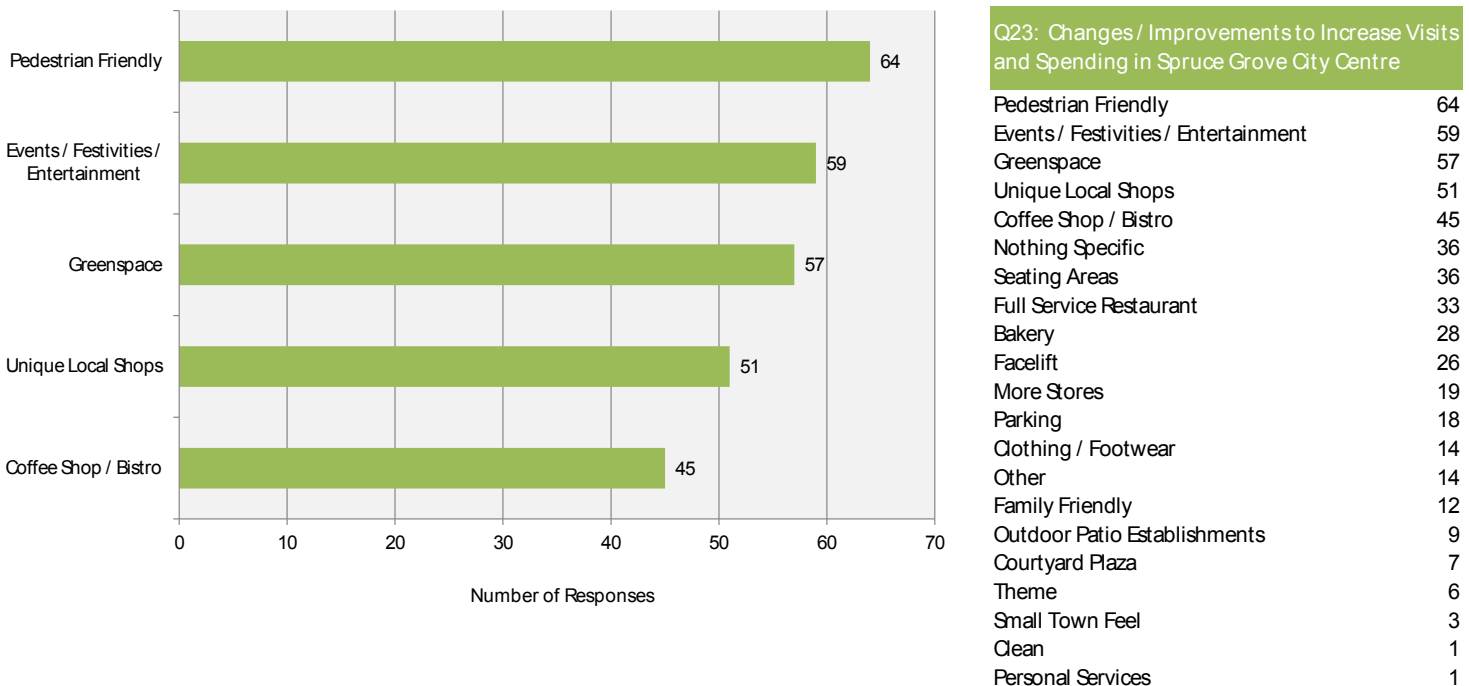
In recognition of the fact that the City has indicated a strong desire to identify ways to revitalize or rediscover the City Centre area, Consumer Survey respondents were specifically asked the following questions pertaining to their current views on the Spruce Grove City Centre as a location to shop/visit:

- What is your main reason to visit the Spruce Grove City Centre?
- What is your main reason for NOT visiting the Spruce Grove City Centre?
- What changes/improvements would increase your visits/spending in Spruce Grove's City Centre?

**FIGURE 6.23**  
**RESPONDENT MAIN REASONS FOR NOT VISITING SPRUCE GROVE'S CITY CENTRE**



**FIGURE 6.24**  
**RESPONDENT CHANGES/IMPROVEMENTS TO INCREASE VISITS AND SPENDING IN SPRUCE GROVE'S CITY CENTRE**



# 6

It is clear, as shown in **Figure 6.22** that Spruce Grove's City Centre is an area to which people visit by necessity most often for medical or professional visits as well as with a specific store or service in mind.

It is not a location where visitors will linger or browse the street, but rather seen as a district to go in, get what you need and get out.

The identification of Food & Beverage (Fast Food & Full Service Restaurant) as a reason for visiting the City Centre is more likely a result of the fact that there is a daytime office population that utilizes these businesses.

A key opportunity would be to introduce a stronger restaurant brand or ethnicity that would stimulate more evening activity in the City Centre.

When asked about peoples main reasons for not visiting the City Centre (**Figure 6.23**), respondents indicated a lack of appeal and that they were even unaware of the City Centre itself.

These responses speak to the overall lack of promotion and identity for the City Centre in terms of where it is and how it is spatially delineated.

The majority of the responses all point to a City Centre area that is reluctantly visited and in need of an identity.

**Figure 6.24** solicited respondents' views as to what changes and improvements would increase visits and spending in the City Centre.

The responses point to three of the most important elements of place making; pedestrian friendly, Events/Festivities/Entertainment and Green Space. The fact that these were all mentioned before any particular store type suggests that the City Centre lost its way as a community gathering space, yet these critical components could be re-introduced to stimulate life back in the City Centre.

In terms of businesses however, respondents wish to see more unique local shops, coffee bistros and restaurants.

Responses suggest it is not necessary to go head to head with nodes like Century Crossing, but that respondents want to connect with a place for more than just shopping. This is exactly what the City Centre could and should be.

## 6.8

### SUMMARY & IMPLICATIONS

The Consumer Intercept Survey yielded findings that reinforce the more regional market/draw for the City of Spruce Grove.

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

Even though consumers identified specific retailers in categories such as Home Furnishings and Home Electronics, there overall importance ratings as it relates to retaining more spending in Spruce Grove did not seem to resonate as much. Regardless, using the example of Winners would suggest that the introduction of some home furnishings and home electronics retailers could be viable for the market if in the right location.



Photos Courtesy of City of Spruce Grove, 2017

# 6

Respondents identified a number of recognized restaurant and retailer brands. With the success of Century Crossing, Spruce Grove is well positioned to attract many of the identified restaurants, or at least make an effort at attracting them.

The majority of tenants sought by respondents combined with their spending patterns suggests that the most compatible locations capable of fulfilling retailer site location requirements will be Century Crossing, Westland Market Mall (if it chooses to further externalize its format) and Westwind Centre.

Spruce Grove's City Centre will undoubtedly continue to face external pressures resulting from new growth, particularly as Westwind Centre gets traction.

The City Centre is still recognized as a key node that can accommodate future tenant opportunities, particularly in the specialty retail, food & beverage categories and personal services categories.

However, the City Centre has an opportunity to respond and create a framework that brings consumers back to the City Centre for more than just the quick in and out essential needs, but for longer stay social interaction and community engagement.

As more traditional retail developments enter the market, the more residents will harken back to wanting the social and experiential side of shopping, dining and leisure. Ultimately, this is where the City Centre can fill a void and niche in the market.

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

A young, family-oriented market, with disposable incomes is a core prerequisite many retailers look for when selecting a market. Combined with Spruce Grove's Retail Trade Area comprised of 137,000 residents and validation from the Consumer Intercept Survey, Spruce Grove is well-positioned to attract an even wider array of tenants, since the city is proving itself to be a self-sufficient freestanding regional retail market.



*Photos Courtesy of City of Spruce Grove, 2017*

# 7 OFFICE MARKET ANALYSIS

## 7.1 INTRODUCTION

This section will provide a detailed picture of the overall citywide office inventory comprising a detailed inventory of the city’s office-related nodes and businesses that make up the City of Spruce Grove’s office market.

To further assess the level of office supply, a comprehensive inventory and evaluation was conducted of the existing City of Spruce Grove’s office inventory with respect to locations and amount of space (Refer to Appendix B for detailed inventory listing).

The purpose of the office inventory tabulation is to create a foundation upon which forecasted office demand could be quantified, where such growth could be allocated and what types of office-related businesses are most compatible with the City.

TABLE 7.1  
OFFICE INVENTORY SUMMARY

Identified Office Node	Total Inventory (SF)	Number of Businesses
City Centre	157,177	102
Power Centre Retail	13,650	10
Hwy 16 Auto & Hardware	4,500	3
Neighbourhood Convenience	20,134	14
Westland Market	51,295	32
Century Crossing	6,272	1
Mixed Industrial Commercial	-	-
Tri Leisure Village Area	33,670	5
Westwind	60,532	3
<b>TOTAL</b>	<b>347,230</b>	<b>170</b>

**NOTE:** The inventory for **Neighbourhood Convenience** does not include the future 2nd level office space currently under construction at the Spruce Village Centre, which is estimated to have approximately 8,000 to 10,000 sf of leasable office space oriented towards medical services

## 7.1 OFFICE INVENTORY

The compilation of office inventory, as summarized in **Tables 7.1, 7.2 & 7.3 and Figure 7.1** reveals a total inventory of office space in the City of Spruce Grove in the range of 350,000 sf (including new buildings under construction at Westwind).

This inventory comprises a total of approximately 172 businesses.

**Table 7.1** illustrates the distribution of the City’s office space in correlation with the retail/commercial nodes previously identified. Accordingly, and not surprisingly the City Centre is the dominant location for office-related businesses, with an inventory of 157,200 sf or almost 45% of the City’s office inventory.

This inventory also includes an estimated 102 businesses.

In terms of overall vacancy, **Table 7.2** reveals approximately 108,100 sf of vacant space, or 31%.

FIGURE 7.1

OFFICE INVENTORY BY BUSINESS TYPE & NUMBER OF BUSINESSES

(Source: Cushing Terrell Architecture Inc. 2017)

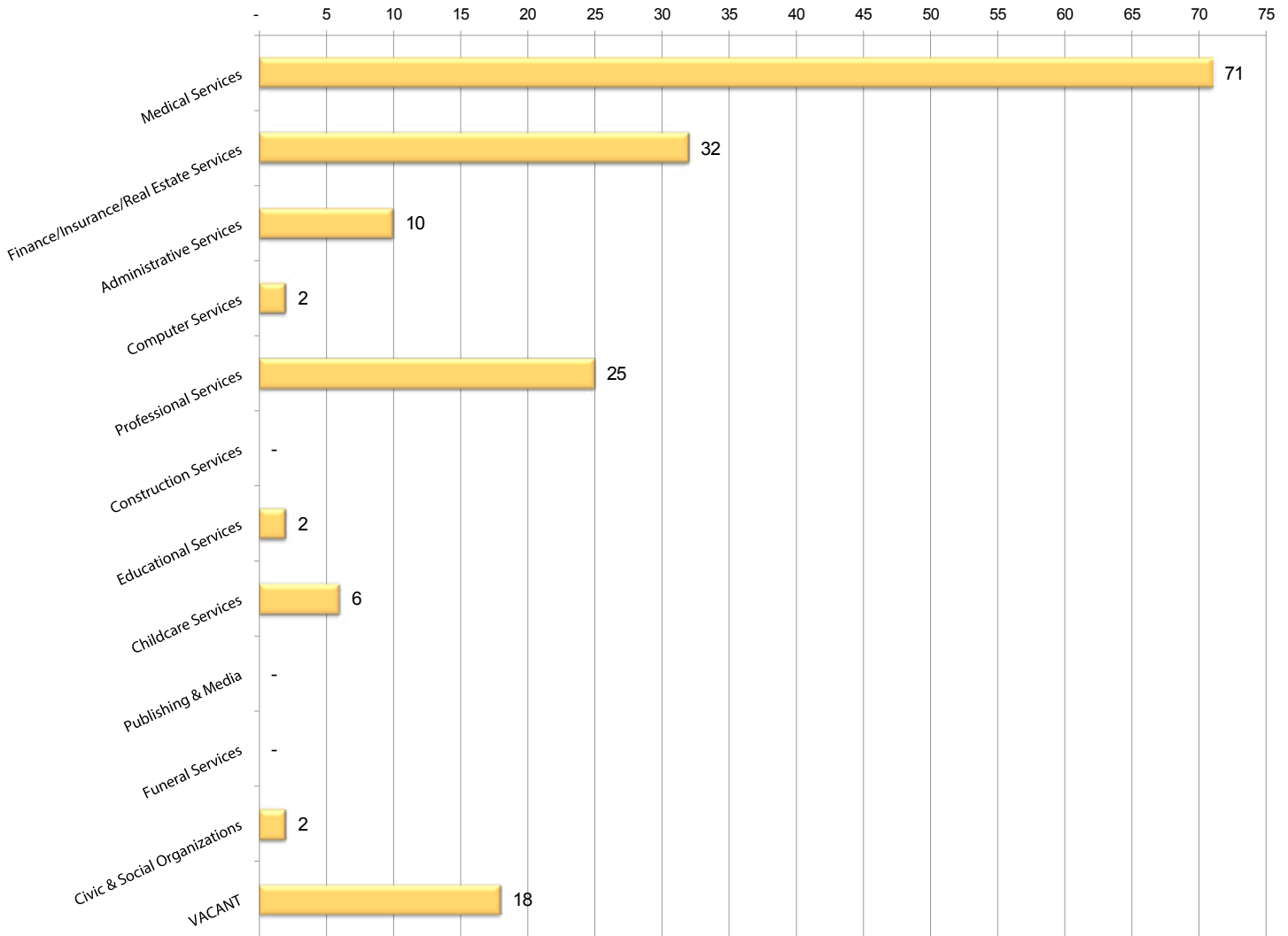


TABLE 7.2

OFFICE INVENTORY BY NODE AND BUSINESS TYPE

(Source: Cushing Terrell Architecture Inc. 2017)

Business Category	IDENTIFIED OFFICE NODE (SF)									
	City Centre	Power Centre Retail	Hwy 16 Auto & Hardware	N'hood Convenience	Westland Market	Century Crossing	Mixed Industrial Commercial	Tri Leisure Village Area	Westwind	Totals (SF)
Medical Services	71,522	10,650	0	4,000	20,088	6,272	0	3,500	0	116,032
Finance/Insurance/Real Estate Services	27,000	1,000	1,000	1,500	7,906	0	0	0	0	38,406
Administrative Services	8,500	0	0	0	2,750	0	0	0	0	11,250
Computer Services	5,000	0	0	2,000	0	0	0	0	0	7,000
Professional Services	22,250	2,000	0	2,000	8,417	0	0	5,796	0	40,463
Educational Services	0	0	0	750	1,711	0	0	0	0	2,461
Childcare Services	4,000	0	0	8,000	0	0	0	0	4,000	16,000
Construction Services	0	0	0	0	0	0	0	0	0	0
Publishing & Media	1,500	0	0	0	0	0	0	0	0	1,500
Funeral Services	1,000	0	0	0	0	0	0	0	0	1,000
Civic & Social Organizations	2,500	0	2,500	0	0	0	0	0	0	5,000
VACANT	13,905	0	1,000	1,884	10,423	0	0	24,374	56,532	108,118
<b>TOTAL</b>	<b>157,177</b>	<b>13,650</b>	<b>4,500</b>	<b>20,134</b>	<b>51,295</b>	<b>6,272</b>	<b>0</b>	<b>33,670</b>	<b>60,532</b>	<b>347,230</b>



# 7

However, this is misleading as this figure includes approximately 57,000 sf under construction at Westwind as well as almost 25,000 of recently completed new space at Tri Leisure. If these cumulative figures of approximately 80,000 sf are excluded, the real vacancy sits at 10.7%.

The biggest weakness of the City's office inventory, with the exception of the Queen Street Professional Centre, is the age and quality of the office product in the City, though this will be addressed by the new additions at both Tri Leisure and Westwind.

The majority of the office inventory is in older buildings and spaces and thus while potentially having lower lease rates will present a challenge in attracting potential new office tenants.

In response to the limited quality and amount of available traditional office space, the market is finding that users are taking up what would otherwise be streetfront retail uses. With new purpose built office spaces, this trend may decline except where costs of streetfront spaces are still more affordable.

As the City continues to grow, new locations for Office space should be considered in the City Centre as part of the Area Redevelopment Plan.

The types of office businesses that currently occupy spaces in the City are dominated by Medical Services, as well as Finance/Insurance/Real Estate and Professional Services. The latter Professional Services are most frequently related to services in the oil & gas sector.

**Table 7.2** also provides a breakdown of the types of office use by the respective office node. While the City Centre is the hub of Medical, Finance/Insurance/Real Estate and Professional Services, the Westland Market node also has a very strong cluster of Medical services.

The Neighbourhood Convenience nodes, on the other hand have a fair share of office space allocated for Childcare Services. These Childcare services do not include in-home businesses, but rather only those that are licensed premises in office or retail spaces.

TABLE 7.3  
**OFFICE INVENTORY BUSINESS TYPE BREAKDOWN**

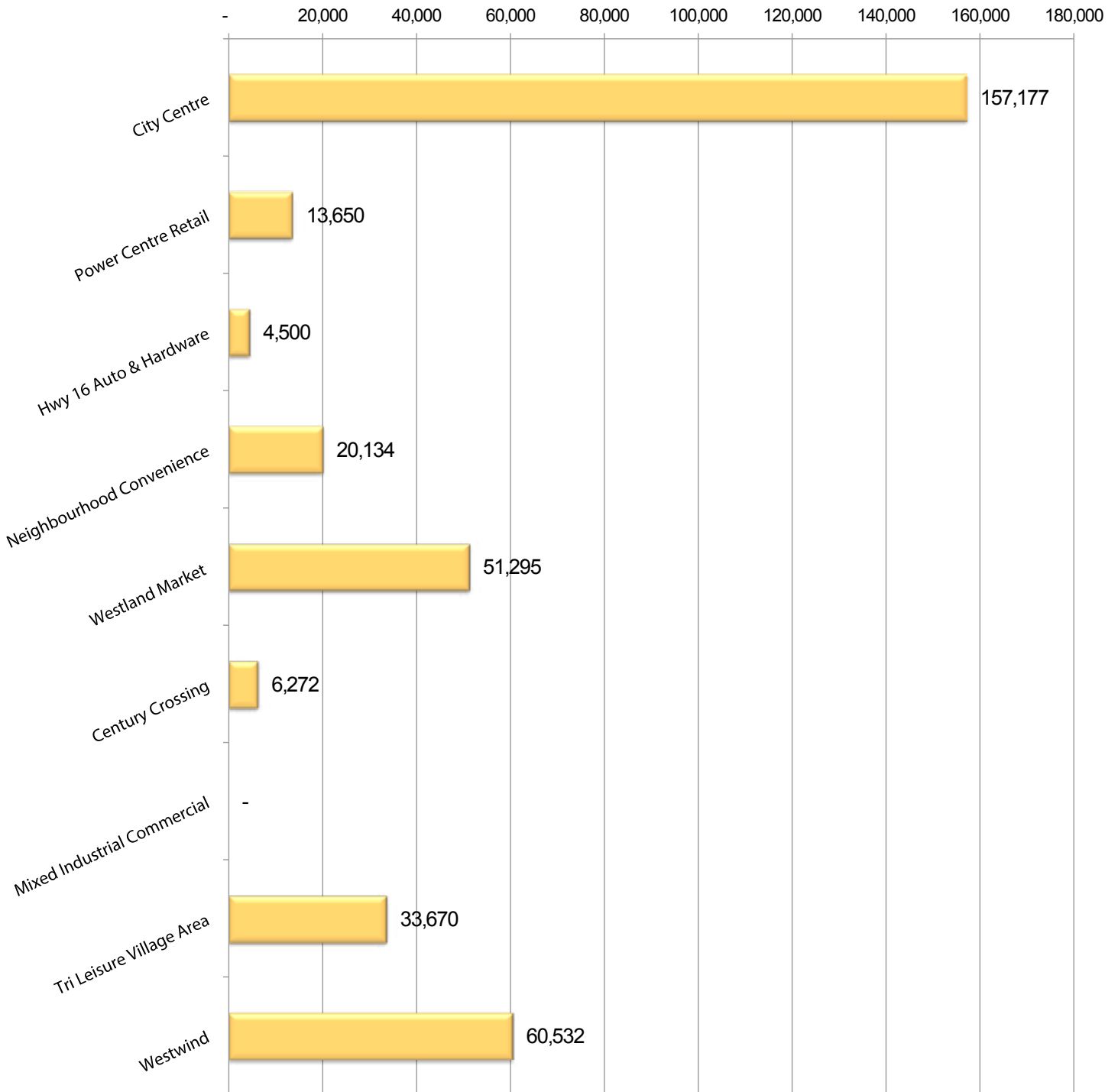
(Source: Cushing Terrell Architecture Inc. 2017)

Business Category	Existing Inventory (SF)	Existing Inventory (%)	Number of Businesses	% of Number of Businesses	Average Business Size
Medical Services	116,032	33.4%	71	42%	1,634
Finance/Insurance/Real Estate Services	38,406	11.1%	32	19%	1,200
Administrative Services	11,250	3.2%	10	6%	1,125
Computer Services	7,000	2.0%	2	1%	3,500
Professional Services	40,463	11.7%	25	15%	1,619
Construction Services	-	0.0%	-	0%	
Educational Services	2,461	0.7%	2	1%	1,231
Childcare Services	16,000	4.6%	6	4%	2,667
Publishing & Media	1,500	0.4%	-	0%	
Funeral Services	1,000	0.3%	-	0%	
Civic & Social Organizations	5,000	1.4%	2	1%	2,500
VACANT	108,118	31.1%	18	11%	6,007
<b>TOTAL</b>	<b>347,230</b>	<b>100.0%</b>	<b>168</b>	<b>100%</b>	<b>2,067</b>



FIGURE 7.2  
**OFFICE INVENTORY BY BUSINESS & FLOORSPACE**

(Source: Cushing Terrell Architecture Inc. 2017)



# 7

## 7.3 OFFICE DEMAND

On the basis of the estimated office inventory, which equates to an office space ratio of 8 sf per capita, future demand could be forecast by applying the per capita ratio (as it is today) against future new population growth.

Accordingly, **Table 7.4** illustrate the incremental annual and cumulative demand for new office space in the City of Spruce Grove.

Under this calculation, estimated new office demand could surpass 200,000 sf by 2027. On an incremental annual basis, the demand averages approximately 20,000 sf. This assumes that the City would get all of this demand. However, the reality of competition suggests that some of this office demand could go to Acheson or elsewhere. That said, even if Spruce Grove were able to garner half the demand, the demand for office inventory would be relatively strong and supported by continued growth in Spruce Growth at current and historic levels.

The historic trend in Spruce Grove has been an absorption of approximately 5,000 to 7,000 sf per year.

Therefore, the estimates of future demand could be considered slightly aggressive, but as Spruce Grove continues to grow and its relationship with Acheson becomes more important, the drivers of office demand are expected to increase, albeit at modest levels.

In order for office development to occur, it is most feasible for developments to have a critical mass of demand.

Therefore, the information provided in **Table 7.4** can be used as a guide to understand when demand is prevalent.

For example, if population growth slows, then the commensurate demand level would be lower. Alternatively, if population growth grew faster than envisioned, the demand for office space would increase.

The office demand forecasts suggest that by 2022 there would be enough demand in the City for approximately 90,000 sf of new office space which may not be all in one development, but could be allocated in two areas of the city, namely the City Centre and Westwind.

TABLE 7.4  
CITYWIDE OFFICE DEMAND FORECASTS

(Source: Cushing Terrell Architecture Inc. 2017)

Projected Office Demand By Population Growth											
	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Projected Total Population	34,881	36,510	38,215	40,000	41,868	43,824	45,871	48,013	50,255	52,602	55,059
Projected Annual Population Growth	1,291	1,629	1,705	1,785	1,868	1,956	2,047	2,142	2,242	2,347	2,457
Incremental Office Demand in Spruce Grove (sf)*	0	16,291	17,051	17,848	18,684	19,556	20,467	21,423	22,423	23,470	24,567
Cumulative Office Demand in Spruce Grove (sf)*	0	16,291	33,342	51,190	69,874	89,430	109,897	131,320	153,743	177,213	201,780

\*Factoring 10.0 sq ft of office space per capita in the City of Spruce Grove  
Office Space includes Professional, Medical Services, FIRE, Public Administration and Business Services

# 8 CONCLUSION

## 8.1

### FINDINGS & CONSIDERATIONS

The Retail & Office Market Analysis for the City of Spruce Grove entailed an extensive process summarized in the following:

- *A detailed tabulation of the city's existing retail and office inventory further allocated into retail categories and sensitized by node and estimated retail sales performance;*
- *A Consumer Intercept Survey in Spruce Grove to ascertain origins, spending habits and preferences;*
- *A methodical and updated 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 findings and considerations for the City of Spruce Grove's retail and office environment.

#### **KEY FINDINGS:**

Spruce Grove continues to grow and solidify itself as a self-sufficient regional and freestanding retail market.

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

Spruce Grove's retail trade area catchment serves a market of almost 138,000 full time residents, which is forecast to increase to over 164,000 by 2027.

The City of Spruce Grove currently has approximately 2.39 million sf of total **occupied** retail space.

Current estimates for the trade area suggest current demand for 2.35 million sf of retail space.

Future demand forecasts for new retail space over the next decade suggest that the City of Spruce Grove could grow by an additional 775,000 to 1 million sf. Pioneer Point (located adjacent and immediately east of Century Crossing) is one such development that will tap into this figure. This is a cumulative figure and thus any demand would need to occur in step and balance with demand from both the market, consumer and tenant perspectives.

Spruce Grove's regional catchment is evidenced by a net sales inflow of \$693.5 million.

Spruce Grove garners an estimated inflow of almost \$210.8 million in Convenience Merchandise retail sales of which \$156.3 million is in Grocery & Specialty Foods Sales.

Spruce Grove has a leakage/outflow of just under \$49.2 million in Home Furnishings and Home Electronics categories (\$29.0 million and \$20.2 million respectively), as well as additional leakage in key target categories such as Toys & Hobbies (\$340,000) and Footwear (\$6.3 million).

Consumer Survey Respondents would like to see more Full-Service Restaurants, Clothing & Footwear and Toys & Hobbies at value to mid price points.

# 8

An enhanced offering in these categories could lead to further retention of sales dollars in Spruce Grove as well as more inflow from surrounding towns and counties.

Spruce Grove has a total occupied office inventory of 225,000 sf excluding approximately 80,000 sf of new office space either recently completed or scheduled to come on stream in 2018.

Forecast for **new office space** indicates cumulative demand for approximately 200,000 sf by 2027 (or an average incremental demand of 20,000 sf per year).

## **CONSIDERATIONS**

Ensure that retail growth does not come at the expense of the City Centre's revitalization efforts.

Prioritize future retail developments that respond to tenant-driven, consumer-driven and market-driven demand.

Undertake Retail Impact Assessments to make sure that projects are feasible and that their impact on existing retail is not detrimental within reason.

Prioritize key target categories and tenants that can benefit from the sales inflow as well as curbing some outflow.

Over the next decade, the City of Spruce Grove should strive to increase its market share of retail spending from **City Residents** from an estimated 56% today to 61% and an increase of **Total Retail Trade Area** market share penetration from 48% to 53%.

FIGURE 8.1  
 POTENTIAL TARGET F&B & CONVENIENCE RETAILERS FOR SPRUCE GROVE



FIGURE 8.2

POTENTIAL TARGET DSTM/COMPARISON RETAILERS FOR SPRUCE GROVE





*Photos Courtesy of City of Spruce Grove, 2017*



# RETAIL & OFFICE

## Market Analysis

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City of Spruce Grove

## APPENDICES



(Consumer Intercept Survey 2015)



# A APPENDIX | RETAIL INVENTORY

Retail Business Name	Sub-Retail Node	Retail Node	General Retail Category	NAICS Code	NAICS Description	Est. Area (SF)
7/11	Century Crossing Shopping Centre	Century Crossing	Grocery & Specialty Foods	451110	Supermarkets & other grocery (except convenience stores)	2,960
ATB FINANCIAL	Century Crossing Shopping Centre	Century Crossing	Personal Services	522111	Personal and commercial banking industry	9,057
BONEN BISCUIT	Century Crossing Shopping Centre	Century Crossing	Miscellaneous Specialty	453910	Pet & pet supplies	1,200
BOOSTER JUICE	Century Crossing Shopping Centre	Century Crossing	Limited Service F&B	722512	Limited service restaurants	1,200
BRIDGEPORT DRY CLEANERS	Century Crossing Shopping Centre	Century Crossing	Personal Services	812310	Drycleaning & laundry services	1,300
CARLS JR.	Century Crossing Shopping Centre	Century Crossing	Limited Service F&B	722512	Limited service restaurants	3,200
CENTURY TAILOR	Century Crossing Shopping Centre	Century Crossing	Personal Services	313310	Textile & Fabric Finishing	1,000
CHATTERS	Century Crossing Shopping Centre	Century Crossing	Personal Services	812116	Unisex hair	2,200
CHILDRENS PLACE	Century Crossing Shopping Centre	Century Crossing	Clothing & Apparel	448130	Childrens clothing stores	2,200
CHOPPED LEAF	Century Crossing Shopping Centre	Century Crossing	Limited Service F&B	722512	Limited service restaurants	1,300
COBS	Century Crossing Shopping Centre	Century Crossing	Grocery & Specialty Foods	318111	Retail Bakery	1,200
ELITE JEWELER	Century Crossing Shopping Centre	Century Crossing	Jewelry & Accessories	448310	Jewelry stores	1,200
FAMOSO PIZZERIA	Century Crossing Shopping Centre	Century Crossing	Limited Service F&B	722512	Limited service restaurants	2,595
FATBURGER	Century Crossing Shopping Centre	Century Crossing	Limited Service F&B	722512	Limited service restaurants	2,036
GREAT CLIPS	Century Crossing Shopping Centre	Century Crossing	Personal Services	812116	Unisex hair	1,000
LANDMARK THEATRES	Century Crossing Shopping Centre	Century Crossing	Entertainment & Leisure	512130	Motion picture & video exhibition	26,890
MATTRESS MATTRESS	Century Crossing Shopping Centre	Century Crossing	Home Furnishings & Accessories	442110	Furniture Stores	3,200
MICHAELS CRAFTS	Century Crossing Shopping Centre	Century Crossing	Miscellaneous Specialty	451120	Hobby toy & game stores	17,650
MUCHO BURRITO	Century Crossing Shopping Centre	Century Crossing	Limited Service F&B	722512	Limited service restaurants	1,300
ODDLE NOODLE	Century Crossing Shopping Centre	Century Crossing	Limited Service F&B	722512	Limited service restaurants	1,300
OPA GREEK	Century Crossing Shopping Centre	Century Crossing	Limited Service F&B	722512	Limited service restaurants	1,337
PAPA JOHN'S	Century Crossing Shopping Centre	Century Crossing	Limited Service F&B	722512	Limited service restaurants	1,000
PEAVY MART	Century Crossing Shopping Centre	Century Crossing	Home Improvement & Gardening	444110	Home centres	29,115
PETSMART	Century Crossing Shopping Centre	Century Crossing	Miscellaneous Specialty	453910	Pet & pet supplies	10,000
SAKAI SUSHI	Century Crossing Shopping Centre	Century Crossing	Full-Service F&B	722511	Full-service restaurants	2,400
SASSY NAILS	Century Crossing Shopping Centre	Century Crossing	Personal Services	812115	Beauty salons	1,200
SAVE ON FOODS	Century Crossing Shopping Centre	Century Crossing	Grocery & Specialty Foods	451110	Supermarkets & other grocery (except convenience stores)	41,400
SERVUS CREDIT UNION	Century Crossing Shopping Centre	Century Crossing	Personal Services	522111	Personal and commercial banking industry	6,617
SHOPPERS DRUG MART	Century Crossing Shopping Centre	Century Crossing	Pharmacy	446110	Pharmacies & drug stores	18,837
SPORT CHEK	Century Crossing Shopping Centre	Century Crossing	Sporting Goods & Recreation	451119	All other sporting goods stores	22,000
STARBUCKS	Century Crossing Shopping Centre	Century Crossing	Limited Service F&B	722512	Limited service restaurants	1,495
STATE & MAIN KITCHEN + BAR	Century Crossing Shopping Centre	Century Crossing	Full-Service F&B	722511	Full-service restaurants	6,000
SUBWAY	Century Crossing Shopping Centre	Century Crossing	Limited Service F&B	722512	Limited service restaurants	1,300
SUNSET GRILL - COMING SOON	Century Crossing Shopping Centre	Century Crossing	Full-Service F&B	722511	Full-service restaurants	3,200
TELUS	Century Crossing Shopping Centre	Century Crossing	Miscellaneous Specialty	443143	Appliance, television and other electronics	1,200
THE SOURCE	Century Crossing Shopping Centre	Century Crossing	Home Electronics & Appliances	443143	Appliance, television and other electronics	2,400
TIRECRAFT	Century Crossing Shopping Centre	Century Crossing	Auto Parts & Accessories	441320	Retailing and repairing tires	11,000
TOMMY GUN'S	Century Crossing Shopping Centre	Century Crossing	Personal Services	812114	Barber shops	1,245
TRUE VISION	Century Crossing Shopping Centre	Century Crossing	Miscellaneous Specialty	623120	Office of optometrist	2,800
VACANT (beside Oodle Noodle) Unit 120	Century Crossing Shopping Centre	Century Crossing	VACANT			938
WINNEFS	Century Crossing Shopping Centre	Century Crossing	Clothing & Apparel	448140	Family clothing stores	23,184
COOP GAS BAR CONVENIENCE	Lakewood Plaza	Century Crossing	Grocery & Specialty Foods	447110	Gas station with convenience store	2,647
LIQUOR ON MCLEOD LTD	Lakewood Plaza	Century Crossing	Alcohol & Tobacco	445310	Beer, wine & liquor stores	3,033
MUSCLE BEACH FITNESS SHOP	Lakewood Plaza	Century Crossing	Miscellaneous Specialty	713940	Fitness & recreational sport centres	1,211
SALON MONTAGE & SPA	Lakewood Plaza	Century Crossing	Health & Beauty	812115	Beauty salons	1,516
THE BEER HUNTER BAR AND GRILL	Lakewood Plaza	Century Crossing	Full-Service F&B	722511	Full-service restaurants	3,888

Retail Business Name	Sub-Retail Node	Retail Node	General Retail Category	NAICS Code	NAICS Description	Est. Area (SF)
VACANT Home Retail - (former Laberge Trophy)	122 McLeod Ave (East of Main)	City Centre	VACANT			750
WILHAUK BEEF JERKY	201 McLeod Building	City Centre	Grocery & Specialty Foods	451110	Supermarkets & other grocery (except convenience stores)	1,200
HYPERSPACE COMICS	319 McLeod Building	City Centre	Miscellaneous Specialty	453999	All other miscellaneous store retailers	1,000
UNIQUE PERCEPTIONS	319 McLeod Building	City Centre	Miscellaneous Specialty	448120	Womens clothing stores	750
PHARMACHOICE (Sam's Pharmacy)	322 McLeod Ave (East of Main)	City Centre	Pharmacy	446110	Pharmacies & drug stores	1,500
VACANT (beside Triton Building) Unit 102	322 McLeod Ave (East of Main)	City Centre	VACANT			1,700
K STAILORING	323 McLeod Ave (East of Main)	City Centre	Personal Services	313310	Textile & Fabric Finishing	500
NAIL CREATIONS/NATURAL TOUCH ESTHETICS	323 McLeod Ave (East of Main)	City Centre	Health & Beauty	812115	Beauty salons	1,000
THE LOFT HAIR STUDIO	323 McLeod Ave (East of Main)	City Centre	Personal Services	812116	Unisex hair	1,000
URBAN TOUCH	323 McLeod Ave (East of Main)	City Centre	Health & Beauty	812115	Beauty salons	500
KARMA HEALTH WEIGHT LOSS	323 McLeod Building	City Centre	Personal Services	713190	Fitness & recreational sport centres	500
RAY SWOK	Cossack Inn	City Centre	Full-Service F&B	722511	Full-service restaurants	3,000
BUSTERS PIZZA, DONAIR & PASTA	First Ave & Calahoo	City Centre	Limited Service F&B	722512	Limited service restaurants	2,000
GIFTS AND GADGETS	First Ave & Calahoo	City Centre	Miscellaneous Specialty	453999	All other miscellaneous store retailers	2,000
MALLEY'S SEAFOOD OUTLET	First Ave & Calahoo	City Centre	Full-Service F&B	722511	Full-service restaurants	1,500
THE VAPE CAFE	First Ave & Calahoo	City Centre	Alcohol & Tobacco	445310	Beer, wine & liquor stores	1,200
CREATIVE COLOR	First Ave & McLeod	City Centre	Personal Services	812115	Beauty salons	1,000
SCOTIA BANK	First Ave & Queen St	City Centre	Personal Services	522111	Personal and commercial banking industry	3,500
SOLO LIQUOR	First Ave & Queen St	City Centre	Alcohol & Tobacco	445310	Beer, wine & liquor stores	3,600
BLACK FOX STUDIO (above Grove Barber)	First Ave (East of Queen)	City Centre	Miscellaneous Specialty	541920	Photography services	1,000
Etation Glass & Vape (101 B)	First Ave (East of Queen)	City Centre	Alcohol & Tobacco	445310	Beer, wine & liquor stores	500
FIRST STOP TIRE & AUTO	First Ave (East of Queen)	City Centre	Auto Parts & Accessories	441310	Auto parts & accessories	4,000
MIDDLETON FLOORING	First Ave (East of Queen)	City Centre	Home Furnishings & Accessories	442290	All other home furnishings stores	5,000
SPRUCE GROVE FLOWERS & GIFTS	First Ave (East of Queen)	City Centre	Miscellaneous Specialty	453110	Florists	2,000
SUBWAY #13717	First Ave (East of Queen)	City Centre	Limited Service F&B	722512	Limited service restaurants	2,000
VACANT (besides Gifts & Gadgets former laundromat)	First Ave (East of Queen)	City Centre	VACANT			2,500
VACANT (old KFC)	First Ave (East of Queen)	City Centre	VACANT			2,000
Eddie's Smoke Shop	First Ave (East of Queen) 315 First Ave	City Centre	Alcohol & Tobacco	445310	Beer, wine & liquor stores	500
GROVE BARBER SHOP	First Ave (East of Queen) 315 First Ave	City Centre	Personal Services	812114	Barber shops	500
JSDONAIR	First Ave (East of Queen) 315 First Ave	City Centre	Limited Service F&B	722512	Limited service restaurants	500
JACK'S DRIVE INN INC	First Ave (West of Main)	City Centre	Limited Service F&B	722512	Limited service restaurants	2,500
VACANT (beside Greyhound Bus Depot) 101 A	First Ave (West of Main)	City Centre	VACANT			500
COPPER & MINT HAIR STUDIO	First Ave Market	City Centre	Personal Services	812115	Beauty Salons	1,000
ENVISION TATTOO	First Ave Market	City Centre	Personal Services	812990	All other personal services	500
GROVE CITY MEATS	First Ave Market	City Centre	Grocery & Specialty Foods	451110	Supermarkets & other grocery (except convenience stores)	1,000
IZAKAYA	First Ave Market	City Centre	Full-Service F&B	722511	Full-service restaurants	2,500
NHON HOA VIETNAMESE RESTAURANT	First Ave Market	City Centre	Limited Service F&B	722512	Limited service restaurants	1,500
MERIDON HOME MUSIC	Freestanding Business on King Street	City Centre	Books & Multimedia	451140	Musical instruments & supplies	750
GALAXY TAILOFS	Freestanding Business on McLeod Ave	City Centre	Personal Services	313310	Textile & Fabric Finishing	500
RAGGS TO RICHES	Freestanding Business on McLeod Ave	City Centre	Miscellaneous Specialty	453999	All other miscellaneous store retailers	1,000
RYGAIL FILIPINO STORE	Freestanding Business on McLeod Ave	City Centre	Grocery & Specialty Foods	445120	Convenience stores	500
WEED MUSIC	Freestanding Business on McLeod Ave	City Centre	Books & Multimedia	451140	Musical instruments & supplies	1,000
WHITE ORCHID	Freestanding Business on McLeod Ave	City Centre	Personal Services	812115	Beauty Salons	1,000
2 FOR 1 PIZZA & PASTA	King Street Mall	City Centre	Limited Service F&B	722512	Limited service restaurants	1,000
30-MINUTE HIT BOXING	King Street Mall	City Centre	Entertainment & Leisure	713940	Fitness & recreational sport centres	2,000
BOOKWORMZ	King Street Mall	City Centre	Books & Multimedia	451310	Book stores & news dealers	1,000
DYNAMIC BEAUTY	King Street Mall	City Centre	Health & Beauty	812115	Beauty salons	2,000
ESSO CONVENIENCE SNACK SHOP	King Street Mall	City Centre	Grocery & Specialty Foods	447110	Gas station with convenience store	500
FT SUPPLEMENTS	King Street Mall	City Centre	Miscellaneous Specialty	453999	All other miscellaneous store retailers	1,148
GRIFFIN TAEKWONDO	King Street Mall	City Centre	Entertainment & Leisure	713940	Fitness & recreational sport centres	1,800
HARVEYS	King Street Mall	City Centre	Limited Service F&B	722512	Limited service restaurants	3,000
IMPERIAL LIQUOR	King Street Mall	City Centre	Alcohol & Tobacco	445310	Beer, wine & liquor stores	1,750
LABERGE ENGRAVING & GIFTS	King Street Mall	City Centre	Miscellaneous Specialty	453999	All other miscellaneous store retailers	1,000
MARY BROWNS CHICKEN	King Street Mall	City Centre	Limited Service F&B	722512	Limited service restaurants	2,000
MUSIC CENTRE CANADA, SPRUCE GROVE, ALBERTA	King Street Mall	City Centre	Personal Services	451140	Musical instruments & supplies	2,000
PART SOURCE	King Street Mall	City Centre	Auto Parts & Accessories	441310	Auto parts & accessories	4,000

Retail Business Name	Sub-Retail Node	Retail Node	General Retail Category	NAICS Code	NAICS Description	Est. Area (SF)
POWERS MEDICAL AESTHETICS	King Street Mall	Qty Centre	Personal Services	812115	Beauty salons	750
STUDIO 89 DANCE	King Street Mall	Qty Centre	Entertainment & Leisure	611610	Fine arts schools	2,000
THANG LONG - VIET FOOD	King Street Mall	Qty Centre	Full-Service F&B	722511	Full-service restaurants	1,000
THAT YOGA PLACE INC	King Street Mall	Qty Centre	Personal Services	713940	Fitness & recreational sport centres	2,000
VACANT (beside Part Source) Unit 2	King Street Mall	Qty Centre	VACANT			1,600
VACANT (Former Cash Store)	King Street Mall	Qty Centre	VACANT			1,359
VAPO SENSE	King Street Mall	Qty Centre	Alcohol & Tobacco	445310	Beer, wine & liquor stores	1,200
FRONTLINE FITNESS (relocated from Nelson Ctr)	King Street Plaza	Qty Centre	Miscellaneous Specialty	713940	Fitness & recreational sport centres	5,000
JOHN KENNETH HAIR STUDIO	King Street Plaza	Qty Centre	Personal Services	812116	Unisex hair	1,800
MEDICINE SHOPPE	King Street Plaza	Qty Centre	Pharmacy	446110	Pharmacies & drug stores	1,000
PERKS COFFEE HOUSE	King Street Plaza	Qty Centre	Limited Service F&B	722512	Limited service restaurants	2,000
PORTA ROMANA RESTAURANT	King Street Plaza	Qty Centre	Full-Service F&B	722511	Full-service restaurants	2,200
VACANT	King Street Plaza	Qty Centre	VACANT			1,250
VACANT	King Street Plaza	Qty Centre	VACANT			1,468
CENTRAL HAIR	King Street Strip	Qty Centre	Personal Services	812115	Beauty salons	750
FLOWER FANTASY AND GIFTS	King Street Strip	Qty Centre	Miscellaneous Specialty	453110	Florists	1,250
GOLD MEDAL COSTUMES	King Street Strip	Qty Centre	Clothing & Apparel	448130	Childrens clothing stores	1,200
LIQUORS R US	King Street Strip	Qty Centre	Alcohol & Tobacco	445310	Beer, wine & liquor stores	2,000
OCEAN NAILS	King Street Strip	Qty Centre	Health & Beauty	812115	Beauty salons	750
ORCHARD BERRY ARRANGEMENTS	King Street Strip	Qty Centre	Miscellaneous Specialty	453999	All other miscellaneous store retailers	750
SOAPS LAUNDROMAT	King Street Strip	Qty Centre	Personal Services	812310	Drycleaning & laundry services	1,000
SOKANNES GOLDSMITH	King Street Strip	Qty Centre	Jewelry & Accessories	448310	Jewelry stores	500
ST ANDREWS THRIFT SHOP	Main Street	Qty Centre	Miscellaneous Specialty	453310	Used merchandise stores	1,000
CIBC	McLeod Ave & Calahoo	Qty Centre	Personal Services	522111	Personal and commercial banking industry	3,600
FAS GAS PLUS CONVENIENCE	McLeod Ave & King St	Qty Centre	Grocery & Specialty Foods	44710	Gas station with convenience store	1,000
SHELL SELECT CONVENIENCE	McLeod Ave & King St	Qty Centre	Grocery & Specialty Foods	44710	Gas station with convenience store	2,000
DOHERTY'S FISH & CHIPS	McLeod Ave (East of Main)	Qty Centre	Limited Service F&B	722512	Limited service restaurants	2,500
SAMS ON MCLEOD CAFÉ	McLeod Ave (East of Main)	Qty Centre	Limited Service F&B	722512	Limited service restaurants	2,500
FUSION SALON AND SPA (relocated from Hillside)	McLeod Ave (West of Main)	Qty Centre	Personal Services	453910	Pet & pet supplies	1,500
GARY'S BARBERSHOP	McLeod Ave (West of Main)	Qty Centre	Health & Beauty	812114	Barber shops	750
ONCE UPON A BOTTLE LIQUOR	McLeod Ave (West of Main)	Qty Centre	Alcohol & Tobacco	445310	Beer, wine & liquor stores	3,500
SHOECRAFTSMEN	McLeod Ave (West of Main)	Qty Centre	Personal Services	812990	All other personal services	500
THE BOXING CLUB & FOPES KICKBOXING	McLeod Ave (West of Main)	Qty Centre	Entertainment & Leisure	713940	Fitness & recreational sport centres	2,000
WE FRAME IT SHOP & GALLERY	McLeod Ave (West of Main)	Qty Centre	Home Furnishings & Accessories	442290	All other home furnishings stores	2,000
WOODLAND QUILTING CO (beside Dominion Ldg)	McLeod Ave (West of Main)	Qty Centre	Miscellaneous Specialty	453999	All other miscellaneous store retailers	1,000
BRAS & SO MUCH MORE/ROMANTIC NOTIONS	McLeod Ave Plaza	Qty Centre	Clothing & Apparel	448120	Womens clothing stores	4,500
GROVE FASHION CLEANERS	McLeod Ave Plaza	Qty Centre	Personal Services	812310	Drycleaning & laundry services	2,500
KEEP YOUR GAME ON	McLeod Ave Plaza	Qty Centre	Toys & Hobbies	451120	Hobby toy & game stores	750
NAIL CONCEPTS	McLeod Ave Plaza	Qty Centre	Health & Beauty	812115	Beauty salons	750
STUDIO MAX HAIR & BEAUTY	McLeod Ave Plaza	Qty Centre	Personal Services	812115	Beauty salons	500
THE FLOORING STORE	McLeod Ave Plaza	Qty Centre	Home Furnishings & Accessories	442290	All other home furnishings stores	1,500
VACANT (beside TeckEra) Unit 210	McLeod Ave Plaza	Qty Centre	Personal Services	713940	Fitness & recreational sport centres	2,400
PERKS COFFEE HOUSE (QSP)	Queen Street Place	Qty Centre	Limited Service F&B	722512	Limited service restaurants	1,000
REXALL PHARMACY	Queen Street Place	Qty Centre	Pharmacy	446110	Pharmacies & drug stores	4,000
ALL PRECIOUS JEWELLERS	Sunrise Professional Building	Qty Centre	Jewelry & Accessories	448310	Jewelry stores	1,500
SOMETHING ELSE RESTAURANT	Sunrise Professional Building	Qty Centre	Full-Service F&B	722511	Full-service restaurants	3,000
WESGROVE HAIR MAGIC (2007) LTD	Sunrise Professional Building	Qty Centre	Health & Beauty	812116	Unisex hair	750
KNIGHTON MENSWEAR	Triton Building	Qty Centre	Clothing & Apparel	448110	Mens clothing stores	1,200
THE PARLOUR	Triton Building	Qty Centre	Personal Services	812115	Beauty salons	1,200
VACANT (Unit 103)	Triton Building	Qty Centre	VACANT			1,582
JOEY'S ONLY SEAFOOD RESTAURANT	Village Business Centre	Qty Centre	Full-Service F&B	722511	Full-service restaurants	2,500
WARD SCHOOL OF DANCE	Village Business Centre	Qty Centre	Entertainment & Leisure	611610	Fine arts schools	1,000
LEONA'S SALON & DAY SPA	Westgrove Professional Building	Qty Centre	Health & Beauty	812116	Unisex hair	750
STRUT HAIR & ART	Westgrove Professional Building	Qty Centre	Health & Beauty	812116	Unisex hair	750

Retail Business Name	Sub-Retail Node	Retail Node	General Retail Category	NAICS Code	NAICS Description	Est. Area (SF)
GROVELAUNDRMAT	1st Ave East (Hwy 16 A South)	Hwy 16 Auto & Hardware	Personal Services	812310	Drycleaning & laundry services	2,000
MUD SWEAT & GEARS	1st Ave East (Hwy 16 A South)	Hwy 16 Auto & Hardware	Sporting Goods & Recreation	451113	Cycling equipment & supplies specialty stores	2,500
PINETREE RESTAURANT	Spruce Grove Motor Inn	Hwy 16 Auto & Hardware	Full-Service F&B	722511	Full-service restaurants	1,500
TRAPPERS BAR	Spruce Grove Motor Inn	Hwy 16 Auto & Hardware	Full-Service F&B	722511	Full-service restaurants	2,000
ARBY'S	St Matthews Ave	Hwy 16 Auto & Hardware	Limited Service F&B	722512	Limited service restaurants	3,000
ECONO LUBE / VILLAGE MUFFLER	St Matthews Ave	Hwy 16 Auto & Hardware	Auto Parts & Accessories	811199	All other automotive repair & maintenance	8,000
ENTERPRISE CAR RENTAL	St Matthews Ave	Hwy 16 Auto & Hardware	Auto Parts & Accessories	532111	Passenger car rental	2,000
F/X AUDIO LTD	St Matthews Ave	Hwy 16 Auto & Hardware	Home Electronics & Appliances	443143	Appliance, television and other electronics	2,000
GROVE CHRYSLER JEEP DODGE	St Matthews Ave	Hwy 16 Auto & Hardware	Auto/RV/Motorsports Dealership	441110	New car dealers	100,000
GROVE HYUNDAI	St Matthews Ave	Hwy 16 Auto & Hardware	Auto/RV/Motorsports Dealership	441110	New car dealers	100,000
GROVE RV & LEISURE	St Matthews Ave	Hwy 16 Auto & Hardware	Auto/RV/Motorsports Dealership	441210	Recreational vehicle dealers	200,000
MOONDANCE HOT TUBS & OUTDOOR FURNITURE	St Matthews Ave	Hwy 16 Auto & Hardware	Home Furnishings & Accessories	442290	All other home furnishings stores	5,000
NAPA AUTO PARTS	St Matthews Ave	Hwy 16 Auto & Hardware	Auto Parts & Accessories	441310	Auto parts & accessories	5,000
NO BULL RV SALES	St Matthews Ave	Hwy 16 Auto & Hardware	Auto/RV/Motorsports Dealership	441210	Recreational vehicle dealers	40,000
SPRUCE GROVE BINGO	St Matthews Ave	Hwy 16 Auto & Hardware	Entertainment & Leisure	713299	All other gambling industries	10,000
VACANT (Former Grove Dodge)	St Matthews Ave	Hwy 16 Auto & Hardware	VACANT			100,000
WENDYS RESTAURANT	St Matthews Ave	Hwy 16 Auto & Hardware	Limited Service F&B	722512	Limited service restaurants	3,000
ZENDER FORD	St Matthews Ave	Hwy 16 Auto & Hardware	Auto/RV/Motorsports Dealership	441110	New car dealers	150,000
@TRAX GRILL LOUNGE	Westgrove Drive South	Hwy 16 Auto & Hardware	Full-Service F&B	722511	Full-service restaurants	6,000
CLOVERDALE PAINT INC	Westgrove Drive South	Hwy 16 Auto & Hardware	Home Improvement & Gardening	444120	Paint and wallpaper stores	2,500
DYNAMIC PRINTING & PROMOS	Westgrove Drive South	Hwy 16 Auto & Hardware	Personal Services	323115	Digital printing	2,500
MCDONALD'S RESTAURANT	Westgrove Drive South	Hwy 16 Auto & Hardware	Limited Service F&B	722512	Limited service restaurants	4,000
SHELL CONVENIENCE STORE	Westgrove Drive South	Hwy 16 Auto & Hardware	Grocery & Specialty Foods	445120	Convenience stores	500
TIM HORTON DONUTS	Westgrove Drive South	Hwy 16 Auto & Hardware	Limited Service F&B	722512	Limited service restaurants	2,000
WATER WORLD	Westgrove Drive South	Hwy 16 Auto & Hardware	Miscellaneous Specialty	453999	All other miscellaneous store retailers	2,000
FOUNTAIN TIRE SPRUCE GROVE	Alberta Ave	Mixed Industrial Commercial	Auto Parts & Accessories	441320	Retailing and repairing tires	11,177
DR. HOT TUB	Oswald Dr	Mixed Industrial Commercial	Home Furnishings & Accessories	453999	Hot-tubs and whirlpools, retail	2,000
ACKLANDS GRANGER INDUSTRIAL SUPPLIES	South Ave	Mixed Industrial Commercial	Auto Parts & Accessories	444130	Power driven hand tools, retail	2,500
CAR CLEAN PLUS	South Ave	Mixed Industrial Commercial	Auto Parts & Accessories	811192	Car washes, self-service or automatic	3,000
FAS GAS PLUS CONVENIENCE	South Ave	Mixed Industrial Commercial	Grocery & Specialty Foods	447110	Gas station with convenience store	2,500
H & EUPHOLSTERY	South Ave	Mixed Industrial Commercial	Home Furnishings & Accessories	451130	Fabric, upholstery, retail	4,000
HOME HARDWARE	South Ave	Mixed Industrial Commercial	Home Improvement & Gardening	444110	Home centres	35,081
HUGHES COIN CARWASH	South Ave	Mixed Industrial Commercial	Auto Parts & Accessories	811192	Car washes, self-service or automatic	10,131
JIGGLES TO WIGGLES	South Ave	Mixed Industrial Commercial	Miscellaneous Specialty	453999	All other miscellaneous store retailers	4,660
JOFFREY'S WATER	South Ave	Mixed Industrial Commercial	Miscellaneous Specialty	453999	All other miscellaneous store retailers	2,400
LOW COST LUMBER	South Ave	Mixed Industrial Commercial	Home Improvement & Gardening	416310	Combinations of lumber and building materials, wholesale	19,910
O.K. TIRE STORE	South Ave	Mixed Industrial Commercial	Auto Parts & Accessories	441320	Retailing and repairing tires	3,500
PART STOP	South Ave	Mixed Industrial Commercial	Auto Parts & Accessories	441310	Automotive parts and accessories stores	1,500
SANDY VIEW FARMS	South Ave	Mixed Industrial Commercial	Grocery & Specialty Foods	722310	Catering food service, industrial	2,000
TIRE WORLD INC	South Ave	Mixed Industrial Commercial	Auto Parts & Accessories	441320	Retailing and repairing tires	5,000
TOTAL AESTHETICS	South Ave	Mixed Industrial Commercial	Personal Services	812115	Beauty salons	2,000
TROPHY BOOK ARCHERY LTD	South Ave	Mixed Industrial Commercial	Entertainment & Leisure	451110	Archery equipment, retail	5,000
XTREME ATHLETIC CLUB	South Ave	Mixed Industrial Commercial	Entertainment & Leisure	713940	Fitness & recreational sport centres	2,000
THE DANCE PLACE	South Ave 470	Mixed Industrial Commercial	Entertainment & Leisure	611610	Fine arts schools	3,000
TIME OUT BEAUTY RETREAT INC	South Ave 470	Mixed Industrial Commercial	Personal Services	812115	Beauty salons	3,000
BZ BODY'S DANCE & ATHLETIC WEAR	Century Rd Plaza	Neighbourhood Convenience	Clothing & Apparel	448140	Family clothing stores	1,500
CENTURY CONVENIENCE	Century Rd Plaza	Neighbourhood Convenience	Grocery & Specialty Foods	445120	Convenience stores	3,000
VACANT (beside BZ Body's)	Century Rd Plaza	Neighbourhood Convenience	VACANT			1,000
IMAGES SCHOOL OF DANCE	Deer Park Centre	Neighbourhood Convenience	Entertainment & Leisure	611610	Fine arts schools	1,500
LIQUOR KING	Deer Park Centre	Neighbourhood Convenience	Alcohol & Tobacco	445310	Beer, wine & liquor stores	1,500
SNAP FITNESS	Deer Park Centre	Neighbourhood Convenience	Entertainment & Leisure	713940	Fitness & recreational sport centres	3,000
7 - ELEVEN CANADA #33635	Grove Drive W	Neighbourhood Convenience	Grocery & Specialty Foods	447110	Gas station with convenience store	2,000
7 - ELEVEN CANADA INC #32839	Grove Drive W	Neighbourhood Convenience	Grocery & Specialty Foods	447110	Gas station with convenience store	2,000
JELLY BEANZ HAIR	Hillside Centre	Neighbourhood Convenience	Personal Services	812116	Unisex hair	1,000
LA BEZZ DONAIRAND PIZZA	Hillside Centre	Neighbourhood Convenience	Limited Service F&B	722512	Limited service restaurants	1,000
LAUGH LEARN PLAY ACADEMY	Hillside Centre	Neighbourhood Convenience	Personal Services	812116	Unisex hair	1,200
LIQUOR DEPOT	Hillside Centre	Neighbourhood Convenience	Alcohol & Tobacco	445310	Beer, wine & liquor stores	2,500
MAC'S CONVENIENCE STORE	Hillside Centre	Neighbourhood Convenience	Grocery & Specialty Foods	447110	Gas station with convenience store	2,500
PERPETUAL FITNESS	Hillside Centre	Neighbourhood Convenience	Entertainment & Leisure	713940	Fitness & recreational sport centres	10,000
PHARMASAVE	Hillside Centre	Neighbourhood Convenience	Pharmacy	446110	Pharmacies & drug stores	1,200
TASTY VIETNAMESE	Hillside Centre	Neighbourhood Convenience	Limited Service F&B	722512	Limited service restaurants	1,500
T-TOP NAILS	Hillside Centre	Neighbourhood Convenience	Personal Services	812115	Beauty salons	1,000
VACANT Unit 108	Hillside Centre	Neighbourhood Convenience	VACANT			1,278
VACANT Unit 110	Hillside Centre	Neighbourhood Convenience	VACANT			1,698
REDDI-MART (#424037)	Woodhaven Plaza	Neighbourhood Convenience	Grocery & Specialty Foods	445120	Convenience stores	2,000

Retail Business Name	Sub-Retail Node	Retail Node	General Retail Category	NAICSCode	NAICSDescription	Est. Area (SF)
BELL CANADA	Creekside Centre	Power Centre Retail	Personal Services	443143	Appliance, television and other electronics	1,200
BINY'S NAILS	Creekside Centre	Power Centre Retail	Personal Services	812115	Beauty salons	1,000
BUCK OR TWO #323	Creekside Centre	Power Centre Retail	Miscellaneous Specialty	452999	All other miscellaneous general merchandise stores	5,345
EXTREME PITA	Creekside Centre	Power Centre Retail	Limited Service F&B	722512	Limited service restaurants	1,200
FABUTAN	Creekside Centre	Power Centre Retail	Health & Beauty	812990	All other personal services	750
HUMPTY'S RESTAURANT	Creekside Centre	Power Centre Retail	Full-Service F&B	722511	Full-service restaurants	3,200
MARBLE SLAB	Creekside Centre	Power Centre Retail	Limited Service F&B	722512	Limited service restaurants	1,200
PANAGO PIZZA STORE #156	Creekside Centre	Power Centre Retail	Limited Service F&B	722512	Limited service restaurants	1,200
QUIZNOS SUB	Creekside Centre	Power Centre Retail	Limited Service F&B	722512	Limited service restaurants	1,200
SECOND CUP	Creekside Centre	Power Centre Retail	Limited Service F&B	722512	Limited service restaurants	1,200
SMISS CHALET	Creekside Centre	Power Centre Retail	Full-Service F&B	722511	Full-service restaurants	5,961
TD BANK	Creekside Centre	Power Centre Retail	Personal Services	522111	Personal and commercial banking industry	5,984
ANGEL'S NAILS	Sunrise Towne Centre	Power Centre Retail	Health & Beauty	812115	Beauty salons	1,000
COOPERATORS	Sunrise Towne Centre	Power Centre Retail	Personal Services	524210	Insurance agencies & brokerages	1,200
DOLLARAMA #456	Sunrise Towne Centre	Power Centre Retail	Miscellaneous Specialty	452999	All other miscellaneous general merchandise stores	8,000
DULUX PAINTS	Sunrise Towne Centre	Power Centre Retail	Home Improvement & Gardening	444120	Paint and wallpaper stores	3,373
ECONO LUBE	Sunrise Towne Centre	Power Centre Retail	Auto Parts & Accessories	811199	All other automotive repair & maintenance	12,000
JRLIQUOR STORE	Sunrise Towne Centre	Power Centre Retail	Alcohol & Tobacco	445310	Beer, wine & liquor stores	1,962
LAMMLES WESTERN WEAR AND TACK	Sunrise Towne Centre	Power Centre Retail	Clothing & Apparel	448140	Family clothing stores	4,500
OSAKA SUSHI	Sunrise Towne Centre	Power Centre Retail	Full-Service F&B	722511	Full-service restaurants	2,250
ROGERS CELLULAR	Sunrise Towne Centre	Power Centre Retail	Personal Services	443143	Appliance, television and other electronics	1,000
RONA	Sunrise Towne Centre	Power Centre Retail	Home Improvement & Gardening	444110	Home centres	152,074
SPRUCE GROVE PHARMACY	Sunrise Towne Centre	Power Centre Retail	Pharmacy	446110	Pharmacies & drug stores	1,449
TACO TIME CANTINA	Sunrise Towne Centre	Power Centre Retail	Limited Service F&B	722512	Limited service restaurants	1,000
VACANT (Former Pet Pros) Unit 102	Sunrise Towne Centre	Power Centre Retail	VACANT			4,442
XU HUE VIETNAMESE RESTAURANT	Sunrise Towne Centre	Power Centre Retail	Full-Service F&B	722511	Full-service restaurants	1,750
SHELL SELECT CONVENIENCE	Walmart Centre	Power Centre Retail	Grocery & Specialty Foods	447110	Gas station with convenience store	750
WAVES CAR WASH	Walmart Centre	Power Centre Retail	Auto Parts & Accessories	811192	Car washes	8,000
ADDITION ELLE	Walmart Spruce Grove Centre	Power Centre Retail	Clothing & Apparel	448120	Womens clothing stores	3,984
ALIA N TAN JAY	Walmart Spruce Grove Centre	Power Centre Retail	Clothing & Apparel	448120	Womens clothing stores	2,660
BENJAMIN MOORE PAINTS	Walmart Spruce Grove Centre	Power Centre Retail	Home Improvement & Gardening	444120	Paint and wallpaper stores	2,050
CARTERS OSH KOSK B GOSH	Walmart Spruce Grove Centre	Power Centre Retail	Clothing & Apparel	448140	Family clothing stores	5,103
DOLLAR GIANT (B.C.) LTD.	Walmart Spruce Grove Centre	Power Centre Retail	Miscellaneous Specialty	452999	All other miscellaneous general merchandise stores	9,425
EB GAMES	Walmart Spruce Grove Centre	Power Centre Retail	Toys & Hobbies	451120	Hobby toy & game stores	1,541
FIRST CHOICE HAIRCUTTERS	Walmart Spruce Grove Centre	Power Centre Retail	Health & Beauty	812116	Unisex hair	1,004
MARK'S WORK WEARHOUSE	Walmart Spruce Grove Centre	Power Centre Retail	Clothing & Apparel	448140	Family clothing stores	11,153
MAXIMUM MOBILITY (TELUS)	Walmart Spruce Grove Centre	Power Centre Retail	Personal Services	443143	Appliance, television and other electronics	1,337
PAPA MURPHY'S PIZZA	Walmart Spruce Grove Centre	Power Centre Retail	Limited Service F&B	722512	Limited service restaurants	1,270
PAYLESS SHOESOURCE #4704	Walmart Spruce Grove Centre	Power Centre Retail	Footwear	448210	Shoe stores	2,560
PENNINGTON 14+ WOMENS APPAREL	Walmart Spruce Grove Centre	Power Centre Retail	Clothing & Apparel	448120	Womens clothing stores	4,481
REITMANS	Walmart Spruce Grove Centre	Power Centre Retail	Clothing & Apparel	448122	Womens clothing stores	5,118
SIMPLY HEALTH	Walmart Spruce Grove Centre	Power Centre Retail	Health & Beauty	446191	Food health supplement stores	1,181
SUBWAY #25262	Walmart Spruce Grove Centre	Power Centre Retail	Limited Service F&B	722512	Limited service restaurants	1,402
SLZANNES	Walmart Spruce Grove Centre	Power Centre Retail	Clothing & Apparel	448122	Womens clothing stores	2,223
TELUS	Walmart Spruce Grove Centre	Power Centre Retail	Personal Services	443143	Appliance, television and other electronics	1,365
THE CHEESECAKE CAFÉ	Walmart Spruce Grove Centre	Power Centre Retail	Full-Service F&B	722511	Full-service restaurants	5,335
URBAN SOLE SHOES	Walmart Spruce Grove Centre	Power Centre Retail	Footwear	448120	Shoe stores	1,598
VACANT (former Crock a Doodle) Unit 42	Walmart Spruce Grove Centre	Power Centre Retail	VACANT			1,200
VACANT Unit 302	Walmart Spruce Grove Centre	Power Centre Retail	VACANT			2,229
WALMART	Walmart Spruce Grove Centre	Power Centre Retail	Auto Parts & Accessories	452999	All other miscellaneous general merchandise stores	10,000
WALMART	Walmart Spruce Grove Centre	Power Centre Retail	Books & Multimedia			2,000
WALMART	Walmart Spruce Grove Centre	Power Centre Retail	Clothing & Apparel			34,000
WALMART	Walmart Spruce Grove Centre	Power Centre Retail	Footwear			3,000
WALMART	Walmart Spruce Grove Centre	Power Centre Retail	Grocery & Specialty Foods			30,739
WALMART	Walmart Spruce Grove Centre	Power Centre Retail	Health & Beauty			5,000
WALMART	Walmart Spruce Grove Centre	Power Centre Retail	Home Electronics & Appliances			8,000
WALMART	Walmart Spruce Grove Centre	Power Centre Retail	Home Furnishings & Accessories			10,000
WALMART	Walmart Spruce Grove Centre	Power Centre Retail	Home Improvement & Gardening			10,000
WALMART	Walmart Spruce Grove Centre	Power Centre Retail	Jewelry & Accessories			3,500
WALMART	Walmart Spruce Grove Centre	Power Centre Retail	Limited Service F&B			0
WALMART	Walmart Spruce Grove Centre	Power Centre Retail	Miscellaneous Specialty			1,000
WALMART	Walmart Spruce Grove Centre	Power Centre Retail	Personal Services			2,000
WALMART	Walmart Spruce Grove Centre	Power Centre Retail	Pharmacy			6,000
WALMART	Walmart Spruce Grove Centre	Power Centre Retail	Sporting Goods & Recreation			5,000
WALMART	Walmart Spruce Grove Centre	Power Centre Retail	Toys & Hobbies			5,000
WALMART (MCDONALDS)	Walmart Spruce Grove Centre	Power Centre Retail	Limited Service F&B	722512	Limited service restaurants	2,000
WAREHOUSE ONE - THE JEAN STORE	Walmart Spruce Grove Centre	Power Centre Retail	Clothing & Apparel	448140	Family clothing stores	3,564

Retail Business Name	Sub-Retail Node	Retail Node	General Retail Category	NAICSCode	NAICSDescription	Est. Area (SF)
CANADIAN BREW-HOUSE	Westgrove Common	Power Centre Retail	Full-Service F&B	722511	Full-service restaurants	6,200
GREAT CANADIAN OIL CHANGE	Westgrove Common	Power Centre Retail	Auto Parts & Accessories	811199	All other automotive repair & maintenance	1,100
HOME DEPOT SPRUCE GROVE	Westgrove Common	Power Centre Retail	Home Improvement & Gardening	444110	Home centres	75,000
KAL TIRE	Westgrove Common	Power Centre Retail	Auto Parts & Accessories	441320	Retailing and repairing tires	7,300
RBC	Westgrove Common	Power Centre Retail	Personal Services	522111	Personal and commercial banking industry	6,321
STARBUCKS COFFEE #4738	Westgrove Common	Power Centre Retail	Limited Service F&B	722512	Limited service restaurants	1,500
THE BRICK MATTRESS STORE	Westgrove Common	Power Centre Retail	Home Furnishings & Accessories	442290	All other home furnishings stores	3,000
THE REAL CANADIAN LIQUOR STORE	Westgrove Common	Power Centre Retail	Alcohol & Tobacco	445310	Beer, wine & liquor stores	6,500
THE REAL CANADIAN SUPERSTORE	Westgrove Common	Power Centre Retail	Auto Parts & Accessories	452999	All other miscellaneous general merchandise stores	0
THE REAL CANADIAN SUPERSTORE	Westgrove Common	Power Centre Retail	Books & Multimedia			3,000
THE REAL CANADIAN SUPERSTORE	Westgrove Common	Power Centre Retail	Clothing & Apparel			21,000
THE REAL CANADIAN SUPERSTORE	Westgrove Common	Power Centre Retail	Footwear			2,000
THE REAL CANADIAN SUPERSTORE	Westgrove Common	Power Centre Retail	Grocery & Specialty Foods			50,000
THE REAL CANADIAN SUPERSTORE	Westgrove Common	Power Centre Retail	Health & Beauty			3,000
THE REAL CANADIAN SUPERSTORE	Westgrove Common	Power Centre Retail	Home Electronics & Appliances			4,000
THE REAL CANADIAN SUPERSTORE	Westgrove Common	Power Centre Retail	Home Furnishings & Accessories			4,000
THE REAL CANADIAN SUPERSTORE	Westgrove Common	Power Centre Retail	Home Improvement & Gardening			8,000
THE REAL CANADIAN SUPERSTORE	Westgrove Common	Power Centre Retail	Jewelry & Accessories			5,000
THE REAL CANADIAN SUPERSTORE	Westgrove Common	Power Centre Retail	Limited Service F&B			0
THE REAL CANADIAN SUPERSTORE	Westgrove Common	Power Centre Retail	Miscellaneous Specialty			1,500
THE REAL CANADIAN SUPERSTORE	Westgrove Common	Power Centre Retail	Personal Services			3,000
THE REAL CANADIAN SUPERSTORE	Westgrove Common	Power Centre Retail	Pharmacy			5,000
THE REAL CANADIAN SUPERSTORE	Westgrove Common	Power Centre Retail	Sporting Goods & Recreation			2,000
THE REAL CANADIAN SUPERSTORE	Westgrove Common	Power Centre Retail	Toys & Hobbies			2,000
VACANT (former Menchie's) Unit 370	Westgrove Common	Power Centre Retail	VACANT			2,261
WOK BOX SPRUCE GROVE	Westgrove Common	Power Centre Retail	Limited Service F&B	722512	Limited service restaurants	1,000
LEGIT KIOSK	Hawthorne Centre	Tri Leisure Village Area	Entertainment & Leisure			1,040
PINK POIRE	Hawthorne Centre	Tri Leisure Village Area	Miscellaneous Specialty			1,272
SCULPT TO FIT	Hawthorne Centre	Tri Leisure Village Area	Entertainment & Leisure			1,579
SOLO LIQUOR	Hawthorne Centre	Tri Leisure Village Area	Alcohol & Tobacco			2,703
VACANT Unit 112	Hawthorne Centre	Tri Leisure Village Area	VACANT			1,124
VANITY COLLECTIVE	Hawthorne Centre	Tri Leisure Village Area	Personal Services			1,040
IT'SUSHI	Nelson Centre	Tri Leisure Village Area	Full-Service F&B	722511	Full-service restaurants	1,648
MAC'S CONVENIENCE STORE	Nelson Centre	Tri Leisure Village Area	Grocery & Specialty Foods	447110	Gas station with convenience store	2,000
NELSON LIQUOR	Nelson Centre	Tri Leisure Village Area	Alcohol & Tobacco	445310	Beer, wine & liquor stores	4,560
PLANET BEACH SPA	Nelson Centre	Tri Leisure Village Area	Personal Services	812990	All other personal services	1,648
RED CHILI LEAF VIETNAMESE	Nelson Centre	Tri Leisure Village Area	Full-Service F&B	722511	Full-service restaurants	2,500
7-11 FOOD STORE #33561	Spruce Ridge Centre	Tri Leisure Village Area	Grocery & Specialty Foods	447110	Gas station with convenience store	3,000
LAVI'S MANICURE	Spruce Ridge Centre	Tri Leisure Village Area	Personal Services	812115	Beauty salons	1,500
SAM'S PIZZA	Spruce Ridge Centre	Tri Leisure Village Area	Limited Service F&B	722512	Limited service restaurants	2,500
SHARP EDGES HAIRSTYLING AND BARBERING	Spruce Ridge Centre	Tri Leisure Village Area	Personal Services	812116	Unisex hair	1,500
THE BEER SHACK	Spruce Ridge Centre	Tri Leisure Village Area	Alcohol & Tobacco	445310	Beer, wine & liquor stores	2,000
VACANT (end cap) Unit 70	Spruce Ridge Centre	Tri Leisure Village Area	VACANT			750
BOOSTER JUICE	Tri Leisure Centre	Tri Leisure Village Area	Limited Service F&B	722512	Limited service restaurants	1,000
SHOTZ FAMILY SPORTS LOUNGE (TRI LEISURE)	Tri Leisure Centre	Tri Leisure Village Area	Full-Service F&B	722511	Full-service restaurants	4,660
BOSTON PIZZA	Tri-Leisure Village	Tri Leisure Village Area	Full-Service F&B	722511	Full-service restaurants	6,000
ISP COMPUTERS LTD	Tri-Leisure Village	Tri Leisure Village Area	Home Electronics & Appliances	443144	Computers & software	1,298
PEKING WAY CHINESE	Tri-Leisure Village	Tri Leisure Village Area	Full-Service F&B	722512	Full-service restaurants	1,846
Q NAILS	Tri-Leisure Village	Tri Leisure Village Area	Personal Services	812115	Beauty salons	2,025
RUSH NUTRITION	Tri-Leisure Village	Tri Leisure Village Area	Miscellaneous Specialty	453999	All other miscellaneous store retailers	1,631
SUBWAY	Tri-Leisure Village	Tri Leisure Village Area	Limited Service F&B	722512	Limited service restaurants	1,640
SWEET STREET	Tri-Leisure Village	Tri Leisure Village Area	Miscellaneous Specialty	453999	All other miscellaneous store retailers	2,025
TUTTI FRUITI	Tri-Leisure Village	Tri Leisure Village Area	Limited Service F&B	722512	Limited service restaurants	2,150
VACANT (beside ISP Computers)	Tri-Leisure Village	Tri Leisure Village Area	VACANT			1,298
VIETNAMESE RESTAURANT (former Sorrentino's)	Tri-Leisure Village	Tri Leisure Village Area	Full-Service F&B	722512	Full-service restaurants	2,118
Tri-Wellness MD Centre Pharmacy	Tri-Leisure Wellness Centre	Tri Leisure Village Area	Pharmacy			5,000
VACANT - NEW	Tri-Leisure Wellness Centre	Tri Leisure Village Area	VACANT			2,107
VACANT - NEW	Tri-Leisure Wellness Centre	Tri Leisure Village Area	VACANT			1,491
VACANT - NEW	Tri-Leisure Wellness Centre	Tri Leisure Village Area	VACANT			1,491

Retail Business Name	Sub-Retail Node	Retail Node	General Retail Category	NAICS Code	NAICS Description	Est. Area (SF)
GOODWILL DONATIONS CENTRE	Calahoo Square	Westland Market	Miscellaneous Specialty	453310	Used merchandise stores	5,000
LIQUORFORT	Calahoo Square	Westland Market	Alcohol & Tobacco	445310	Beer, wine & liquor stores	2,500
LITTLE CAESARS	Calahoo Square	Westland Market	Limited Service F&B	722512	Limited service restaurants	1,200
MAC'S CONVENIENCE STORE	Calahoo Square	Westland Market	Grocery & Specialty Foods	445120	Convenience stores	2,500
MONEY MART	Calahoo Square	Westland Market	Personal Services	522291	Consumer lending	1,500
VACANT (former ANNIE'S Restaurant)	Centre 16	Westland Market	VACANT			3,000
VACANT (former STONE TEMPLE MASSAGE)	Centre 16	Westland Market	VACANT			1,500
COSMIC PIZZA & DONAIR	Cumbria Centre	Westland Market	Limited Service F&B	722512	Limited service restaurants	750
MAPLE LIQUOR	Cumbria Centre	Westland Market	Alcohol & Tobacco	445310	Beer, wine & liquor stores	1,000
MLT NAILS	Cumbria Centre	Westland Market	Health & Beauty	812115	Beauty salons	1,000
RAINBOW PALACE	Cumbria Centre	Westland Market	Full-Service F&B	722511	Full-service restaurants	2,500
SMOKE KING	Cumbria Centre	Westland Market	Alcohol & Tobacco	445310	Beer, wine & liquor stores	750
GLOW SALON / SPA / NAIL	Karo Centre	Westland Market	Personal Services	812115	Beauty salons	1,500
KFC AND TACO BELL	Karo Centre	Westland Market	Limited Service F&B	722512	Limited service restaurants	5,000
MARLIN TRAVEL	Karo Centre	Westland Market	Personal Services	561510	Travel agencies	622
VACANT	Karo Centre	Westland Market	VACANT			1,410
DAIRY QUEEN	Karo Centre Southwork	Westland Market	Limited Service F&B	722512	Limited service restaurants	2,400
VACANT (unit 30)	Karo Centre Southwork	Westland Market	VACANT			1,200
VACANT (unit 40)	Karo Centre Southwork	Westland Market	VACANT			1,000
VACANT (unit 50)	Karo Centre Southwork	Westland Market	VACANT			1,000
BROADWAY & GRAND BAKERY	McLeod Centre	Westland Market	Full-Service F&B	722512	Full-service restaurants	1,500
GROWERS DIRECT FRESH CUT FLOWERS	McLeod Centre	Westland Market	Miscellaneous Specialty	453110	Florists	1,000
LASH & MAKEUP LOUNGE	McLeod Centre	Westland Market	Personal Services	812115	Beauty salons	1,500
OWEN'S LIQUOR	McLeod Centre	Westland Market	Alcohol & Tobacco	445310	Beer, wine & liquor stores	1,000
THREE MONKEYS	McLeod Centre	Westland Market	Personal Services	812190	Other personal care services	1,000
COMING SOON LIQUOR STORE	Sears Strip Centre	Westland Market	Alcohol & Tobacco	445310	Beer, wine & liquor stores	5,000
SPRUCELAND INSURANCE	Sears Strip Centre	Westland Market	Personal Services	524210	Insurance agencies & brokerages	1,500
VACANT (beside former SEARS APPLIANCES)	Sears Strip Centre	Westland Market	VACANT			1,000
BOSTON PIZZA	Sprucewood Plaza	Westland Market	Full-Service F&B	722511	Full-service restaurants	5,000
LIQUOR KING & SMOKE KING	Sprucewood Plaza	Westland Market	Alcohol & Tobacco	445310	Beer, wine & liquor stores	3,000
TANDOORI GRILL	Sprucewood Plaza	Westland Market	Full-Service F&B	722511	Full-service restaurants	3,000
SMITTY'S FAMILY RESTAURANT	Westgrove Drive North	Westland Market	Full-Service F&B	722511	Full-service restaurants	3,000
SPALOGY	Westgrove Drive North	Westland Market	Personal Services	812115	Beauty salons	1,500
VACANT (CD COMPUTERS)	Westgrove Drive North	Westland Market	VACANT			1,100



Retail Business Name	Sub-Retail Node	Retail Node	General Retail Category	NAICSCode	NAICSDescription	Est. Area (SF)
ANN'S NAIL SPA	Westland Market Mall	Westland Market	Health & Beauty	812115	Beauty salons	1,420
ARFENE	Westland Market Mall	Westland Market	Clothing & Apparel	448120	Womens clothing stores	12,005
BAGS & LUGGAGE LTD	Westland Market Mall	Westland Market	Miscellaneous Specialty	448320	Luggage & leather goods	1,496
BRILLIANT GOLDSMITHS	Westland Market Mall	Westland Market	Jewelry & Accessories	448310	Jewelry stores	1,064
BROWN'S SOCIAL HOUSE	Westland Market Mall	Westland Market	Full-Service F&B	722511	Full-service restaurants	3,269
BULK BARN	Westland Market Mall	Westland Market	Miscellaneous Specialty	453999	All other miscellaneous store retailers	5,855
CANADA SAFEWAY LTD	Westland Market Mall	Westland Market	Grocery & Specialty Foods	451110	Supermarkets & other grocery (except convenience stores)	50,000
CANADIAN TIRE STORE#450	Westland Market Mall	Westland Market	Auto Parts & Accessories	452999	All other miscellaneous general merchandise stores	40,000
CANADIAN TIRE STORE#451	Westland Market Mall	Westland Market	Books & Multimedia			0
CANADIAN TIRE STORE#452	Westland Market Mall	Westland Market	Clothing & Apparel			1,000
CANADIAN TIRE STORE#453	Westland Market Mall	Westland Market	Grocery & Specialty Foods			500
CANADIAN TIRE STORE#454	Westland Market Mall	Westland Market	Health & Beauty			0
CANADIAN TIRE STORE#455	Westland Market Mall	Westland Market	Home Electronics & Appliances			2,000
CANADIAN TIRE STORE#456	Westland Market Mall	Westland Market	Home Furnishings & Accessories			5,000
CANADIAN TIRE STORE#457	Westland Market Mall	Westland Market	Home Improvement & Gardening			20,000
CANADIAN TIRE STORE#458	Westland Market Mall	Westland Market	Jewelry & Accessories			0
CANADIAN TIRE STORE#459	Westland Market Mall	Westland Market	Limited Service F&B			0
CANADIAN TIRE STORE#460	Westland Market Mall	Westland Market	Personal Services			0
CANADIAN TIRE STORE#461	Westland Market Mall	Westland Market	Pharmacy			0
CANADIAN TIRE STORE#462	Westland Market Mall	Westland Market	Footwear			500
CANADIAN TIRE STORE#463	Westland Market Mall	Westland Market	Miscellaneous Specialty			5,000
CANADIAN TIRE STORE#464	Westland Market Mall	Westland Market	Sporting Goods & Recreation			16,000
CANADIAN TIRE STORE#465	Westland Market Mall	Westland Market	Toys & Hobbies			10,000
CHATTERS SALON SPRUCE GROVE	Westland Market Mall	Westland Market	Health & Beauty	812116	Unisex hair	1,505
CLEO'S	Westland Market Mall	Westland Market	Clothing & Apparel	448120	Womens clothing stores	3,590
DALES JEWELERS & GOLDSMITH	Westland Market Mall	Westland Market	Jewelry & Accessories	448310	Jewelry stores	1,083
ELEGANCE HAIR DESIGN	Westland Market Mall	Westland Market	Health & Beauty	812115	Beauty salons	2,651
GRANDMA LEE'S	Westland Market Mall	Westland Market	Limited Service F&B	722512	Limited service restaurants	397
INDIGO SPIRIT BOOKS	Westland Market Mall	Westland Market	Books & Multimedia	451310	Book stores & news dealers	2,355
INVISION OPTICAL	Westland Market Mall	Westland Market	Health & Beauty	623120	Office of optometrist	1,431
M & M MEAT SHOPS#362	Westland Market Mall	Westland Market	Grocery & Specialty Foods	451110	Supermarkets & other grocery (except convenience stores)	1,387
MAMA DONAIR	Westland Market Mall	Westland Market	Limited Service F&B	722512	Limited service restaurants	748
MOBIL FIX	Westland Market Mall	Westland Market	Miscellaneous Specialty	443143	Appliance, television and other electronics	1,007
PET VALU	Westland Market Mall	Westland Market	Miscellaneous Specialty	453910	Pet & pet supplies	3,073
RICKY'S BOOTLEGGER	Westland Market Mall	Westland Market	Clothing & Apparel	448140	Family clothing stores	4,895
RICKY'S ALL DAY GRILL	Westland Market Mall	Westland Market	Full-Service F&B	722511	Full-service restaurants	3,384
SALLY BEAUTY	Westland Market Mall	Westland Market	Personal Services	812115	Beauty salons	1,200
SHELL SELECT CONVENIENCE	Westland Market Mall	Westland Market	Grocery & Specialty Foods	447110	Gas station with convenience store	990
SHOPPERS DRUG MART #341	Westland Market Mall	Westland Market	Pharmacy	446110	Pharmacies & drug stores	14,555
STAPLES BUSINESS DEPOT#243	Westland Market Mall	Westland Market	Miscellaneous Specialty	453210	Office supplies & stationary stores	19,301
STARBUCKS (IN SAFEWAY)	Westland Market Mall	Westland Market	Limited Service F&B	722512	Limited service restaurants	1,500
TIM HORTON DONUTS	Westland Market Mall	Westland Market	Limited Service F&B	722512	Limited service restaurants	2,450
TRIDENT KEY MART	Westland Market Mall	Westland Market	Personal Services	812990	All other personal services	265
VACANT (unit 115)	Westland Market Mall	Westland Market	VACANT			1,113
VALUE VILLAGE	Westland Market Mall	Westland Market	Clothing & Apparel	448140	Family clothing stores	24,388
VITALITY HEALTH	Westland Market Mall	Westland Market	Health & Beauty	446191	Food health supplement stores	600
WALK N BROW KIOSK	Westland Market Mall	Westland Market	Personal Services	812115	Beauty salons	250
A & W RESTAURANT	Westway Rd	Westland Market	Limited Service F&B	722512	Limited service restaurants	3,500
BING'S FAMILY RESTAURANT & LOUNGE	Westway Rd	Westland Market	Full-Service F&B	722511	Full-service restaurants	6,000
BMO	Westway Rd	Westland Market	Personal Services	522111	Personal and commercial banking industry	3,500
CARTRIDGE EXPRESS	Westway Rd	Westland Market	Miscellaneous Specialty	453210	Office supplies & stationary stores	750
EDO JAPAN	Westway Rd	Westland Market	Limited Service F&B	722512	Limited service restaurants	750
JEFFY LUBE	Westway Rd	Westland Market	Auto Parts & Accessories	811199	All other automotive repair & maintenance	4,000
PIZZA 73	Westway Rd	Westland Market	Limited Service F&B	722512	Limited service restaurants	750
SOBEYS	Westway Rd	Westland Market	Grocery & Specialty Foods	451110	Supermarkets & other grocery (except convenience stores)	30,000
SOBEYS WESTERN CELLARS INC	Westway Rd	Westland Market	Alcohol & Tobacco	445310	Beer, wine & liquor stores	5,000
LEASED	Westwind - Longview Drive	Westwind	Miscellaneous Specialty	453999	All other miscellaneous store retailers	1,260
PETRO CANADA CONVENIENCE	Westwind - Longview Drive	Westwind	Grocery & Specialty Foods	447110	Gas station with convenience store	2,000
ROYAL PIZZA	Westwind - Longview Drive	Westwind	Limited Service F&B	722512	Limited service restaurants	1,000
SOLO LIQUOR	Westwind - Longview Drive	Westwind	Alcohol & Tobacco	445310	Beer, wine & liquor stores	2,500
VACANT	Westwind - Longview Drive	Westwind	VACANT			1,260
SHELL SELECT CONVENIENCE (opening 2018)	Westwind Phase 1	Westwind	Grocery & Specialty Foods	447110	Gas station with convenience store	2,000
TIM HORTONS (opening 2018) - unit 1	Westwind Phase 1	Westwind	Limited Service F&B	722512	Limited service restaurants	2,260
VACANT & LEASING (opening 2018) - unit 3	Westwind Phase 1	Westwind	VACANT			1,109
VACANT & LEASING (opening 2018) - unit 4	Westwind Phase 1	Westwind	VACANT			1,188
VACANT & LEASING (opening 2018) - unit 5	Westwind Phase 1	Westwind	VACANT			1,195
VACANT & LEASING (opening 2018) - unit 6	Westwind Phase 1	Westwind	VACANT			1,194
VACANT & LEASING (opening 2018) - unit 7	Westwind Phase 1	Westwind	VACANT			1,123
VACANT & LEASING (opening 2018) - unit 2	Westwind Phase 1	Westwind	VACANT			1,051
NO FRILLS (opening 2018)	Westwind Phase 2	Westwind	Grocery & Specialty Foods	451110	Supermarkets & other grocery (except convenience stores)	20,000

# B APPENDIX | OFFICE INVENTORY

Office Business Name	Identified Office Node	General Office Category	NAICS Code	NAICS Description	Est. Area (SF)	
CENTURY CROSSING DENTAL	Century Crossing Shopping Centre	Century Crossing	Medical Services	621210	Offices of dentists	3,072
SMILES DENTAL	Century Crossing Shopping Centre	Century Crossing	Medical Services	621210	Offices of dentists	3,200
ADVANCED RESPIRATORY CARE	201 McLeod Building	City Centre	Medical Services	621499	All other out-patient care	1,000
NEW SPACE AVAILABLE TO LEASE	201 McLeod Building	City Centre	VACANT			1,000
SPRUCE GROVE VISION CENTRE	216 Main Street	City Centre	Medical Services	623120	Offices of optometrists	1,000
SPRUCE GROVE DENTAL CLINIC	319 McLeod Building	City Centre	Medical Services	621210	Offices of dentists	3,072
VACANT Unit 201	322 McLeod	City Centre	VACANT			1,520
CREEKSIDE MASSAGE THERAPY	322 McLeod Building	City Centre	Medical Services	621390	Offices of all other health practitioners	1,000
VITA SANA NATUROPATHIC	322 McLeod Building	City Centre	Medical Services	621390	Offices of all other health practitioners	1,000
VACANT	323 McLeod Building	City Centre	VACANT			500
ACUPUNCTURE & BEYOND	323 McLeod Building	City Centre	Medical Services	621390	Offices of all other health practitioners	1,000
THRIVE	323 McLeod Building	City Centre	Medical Services	621499	All other out-patient care	500
ABOVE THE BAR ACCOUNTING	323 McLeod Building	City Centre	Finance/Insurance/Real Estate Services	523930	Investment advise	500
PEDDIE INSURANCE & FINANCIAL	323 McLeod Building	City Centre	Finance/Insurance/Real Estate Services	523930	Investment advise	500
MAIN STREET LASER THERAPY	323 McLeod Building	City Centre	Medical Services	621499	All other out-patient care	500
HAPPY N HEALTHY	323 McLeod Building	City Centre	Medical Services	621499	All other out-patient care	500
HEALING HANDS MASSAGE	323 McLeod Building	City Centre	Medical Services	812190	Other personal services	500
HIGHLANDER COUNSELLING & MEDIATION	Centre Square King Street	City Centre	Professional Services	621410	Family planning	1,000
HRC ENGINEERING	Centre Square King Street	City Centre	Professional Services	541330	Engineering services	3,000
HUSTWICK HODGSON & PAYNE BARRISTERS	Centre Square King Street	City Centre	Professional Services	541110	Offices of lawyers	2,000
THC CHARTERED ACCOUNTANTS	Centre Square King Street	City Centre	Finance/Insurance/Real Estate Services	541212	Offices of accountants	1,500
SEAL & BEDARD	Church Rd	City Centre	Professional Services	541212	Offices of accountants	1,000
BACK ON TRAC CHIROPRACTIC	First Ave & Calahoo	City Centre	Medical Services	621310	Offices of chiropractors	500
DOMINION LENDING CENTRES	First Ave & Calahoo	City Centre	Finance/Insurance/Real Estate Services	523930	Investment advise	500
EXCEL FINANCIAL	First Ave & Calahoo	City Centre	Finance/Insurance/Real Estate Services	523930	Investment advise	1,250
H&R BLOCK	First Ave & Queen St	City Centre	Finance/Insurance/Real Estate Services	541231	Tax preparation services	1,250
HUMMINGBIRD NATURAL HEALING CENTRE	First Ave (East of Queen)	City Centre	Medical Services	621499	All other out-patient care	750
LIBERTY TAX	First Ave (East of Queen)	City Centre	Finance/Insurance/Real Estate Services	541231	Tax preparation services	750
MONEY MART SPRUCE GROVE LTD	First Ave (East of Queen)	City Centre	Finance/Insurance/Real Estate Services	522291	Consumer lending	1,000
IMMIGRATION RUS	Home Business on McLeod	City Centre	Professional Services	911320	Immigration services	750
ONE STEP AHEAD PRESCHOOL	King Street Mall	City Centre	Childcare Services	624410	Child daycare services	2,000
PAYDAY LOANS - CASH CANADA	King Street Mall	City Centre	Finance/Insurance/Real Estate Services	522291	Consumer lending	1,000
PHOENIX PHYSICAL THERAPY	King Street Mall	City Centre	Medical Services	621499	All other out-patient care	2,000
PRIMERICA	King Street Mall	City Centre	Finance/Insurance/Real Estate Services	523930	Investment advise	500
YONG MASSAGE THERAPY	King Street Mall	City Centre	Medical Services	621390	Offices of all other health practitioners	1,200
GATEWAY CITY CHURCH	King Street Plaza	City Centre	Religious Organizations	813110	Religious organization	
GROVE EXAMINER/STONY PLAIN REPORTER	King Street Plaza	City Centre	Publishing & Media	511110	Newspaper publishers	1,500
CITY OF SPRUCE GROVE PLANNING & ENGINEERING	King Street Plaza	City Centre	Public Service			
CITY OF SPRUCE GROVE LIBRARY	King Street Plaza	City Centre	Public Service			
CITY OF SPRUCE GROVE ART GALLERY	King Street Plaza	City Centre	Public Service			
EDWARD JONES INVESTMENTS	King Street Strip	City Centre	Finance/Insurance/Real Estate Services	523930	Investment advise	1,000
ENGAGE CITY CHURCH	King Street Strip	City Centre	Religious Organizations	813110	Religious organization	
EXCEL FINANCIAL	King Street Strip	City Centre	Finance/Insurance/Real Estate Services	523930	Investment advise	1,000
GLOBAL CONNECTIONS CHURCH	Main Street & McLeod Ave	City Centre	Religious Organizations	813110	Religious organization	
FRANK DEANGELIS BARRISTER & SOLICITOR	Main Street Law Offices Building	City Centre	Professional Services	541110	Offices of lawyers	1,000
MAIN STREET LAW OFFICES	Main Street Law Offices Building	City Centre	Professional Services	541111	Offices of lawyers	2,000
SPRUCE GROVE DAYCARE	Main Street Law Offices Building	City Centre	Childcare Services	624410	Child daycare services	2,000
ROYAL LEPAGE NORALTA	McLeod Ave & Main Street	City Centre	Finance/Insurance/Real Estate Services	531210	Offices of real estate agents & brokers	3,000
APHIN DENTAL CENTRE	McLeod Ave (East of Main)	City Centre	Medical Services	621210	Offices of dentists	3,500
DR. JAFFRED SOON & ASSOCIATES DENTIST	McLeod Ave (East of Main)	City Centre	Medical Services	621211	Offices of dentists	1,500
MANULIFE SECURITIES	McLeod Ave (East of Main)	City Centre	Finance/Insurance/Real Estate Services	523930	Investment advise	1,500
SPRUCE GROVE SMILES DENTAL GROUP	McLeod Ave (East of Main)	City Centre	Medical Services	621210	Offices of dentists	2,500
WAYNEROTHE & ASSOCIATES WEALTH MGT	McLeod Ave (East of Main)	City Centre	Finance/Insurance/Real Estate Services	523930	Investment advise	750
DRAYDEN INSURANCE	McLeod Ave (West of Main)	City Centre	Finance/Insurance/Real Estate Services	524210	Insurance agencies & brokerages	3,000
EVERGREEN MEDICAL CENTRE	McLeod Ave (West of Main)	City Centre	Medical Services	621110	Offices of physicians	3,000
SERENITY FUNERAL SERVICES	McLeod Ave (West of Main)	City Centre	Funeral Services	812210	Funeral homes	1,000

Office Business Name	Identified Office Node	General Office Category	NAICS Code	NAICS Description	Est. Area (SF)
DOUG HORNER/MLA CONSTITUENCY OFFICE	McLeod Ave Plaza	City Centre	Administrative Services	Business associations	500
TECKERA ENGINEERING CONSULTANTS	McLeod Ave Plaza	City Centre	Professional Services	Engineering services	500
AFTER HOURS CLINIC	Queen Street Place	City Centre	Medical Services	Offices of physicians	1,500
ALBERTA HEALTH SERVICES	Queen Street Place	City Centre	Medical Services	Offices of all other health practitioners	2,000
BIOQUEST RESEARCH	Queen Street Place	City Centre	Medical Services	Offices of all other health practitioners	2,000
DEPARTMENT OF FAMILY MEDICINE UofA	Queen Street Place	City Centre	Medical Services	Offices of physicians	2,000
DR. JOEL ALLEN	Queen Street Place	City Centre	Medical Services	Offices of physicians	2,000
DYNALIFE DX	Queen Street Place	City Centre	Medical Services	Offices of all other health practitioners	2,000
DYNAMIC PHYSIOTHERAPY	Queen Street Place	City Centre	Medical Services	Offices of physical, occupational & speech therapists & audiologists	2,000
FOOT INSTITUTE	Queen Street Place	City Centre	Medical Services	Offices of physical, occupational & speech therapists & audiologists	2,000
IHEAR CLINIC	Queen Street Place	City Centre	Medical Services	Offices of physical, occupational & speech therapists & audiologists	2,000
INSIGHT MEDICAL IMAGING	Queen Street Place	City Centre	Medical Services	Offices of all other health practitioners	2,000
NOVODERM SPA & LASER COSMETICS	Queen Street Place	City Centre	Medical Services	Offices of physicians	2,500
PARKLAND EYE CAFE	Queen Street Place	City Centre	Medical Services	Offices of optometrists	2,000
PARKLAND MEDICAL CLINIC	Queen Street Place	City Centre	Medical Services	Offices of physicians	2,000
QUEEN STREET DENTAL	Queen Street Place	City Centre	Medical Services	Offices of dentists	2,000
QUEEN STREET MEDICAL CLINIC	Queen Street Place	City Centre	Medical Services	Offices of physicians	2,000
SPRUCE GROVE FAMILY & COMMUNITY SUPPORT	Queen Street Place	City Centre	Administrative Services	Family planning	2,000
TRUE BALANCE	Queen Street Place	City Centre	Medical Services	Offices of all other health practitioners	2,000
VACANT (Unit 102)	Queen Street Place	City Centre	VACANT		4,966
WESTGROVE CLINIC	Queen Street Place	City Centre	Medical Services	Offices of physicians	2,000
WESTVIEW PHYSICIAN COLLABORATIVE	Queen Street Place	City Centre	Medical Services	Offices of all other health practitioners	2,000
WESTVIEW PRIMARY CARE NETWORK	Queen Street Place	City Centre	Medical Services	Offices of all other health practitioners	2,000
ANDERSON HEARING CENTRE	Sunrise Professional Building	City Centre	Medical Services	Offices of physical, occupational & speech therapists & audiologists	1,000
CHIROPRACTICE CONNECTION CENTRE	Sunrise Professional Building	City Centre	Medical Services	Offices of chiropractors	1,000
GREENWAY CHARTERED ACCOUNTANT	Sunrise Professional Building	City Centre	Finance/Insurance/Real Estate Services	Offices of accountants	2,000
LA LAW	Sunrise Professional Building	City Centre	Professional Services	Offices of lawyers	2,000
READY ENGINEERING	Sunrise Professional Building	City Centre	Professional Services	Engineering services	5,000
SPRUCE GROVE BUSINESS ASSOCIATION	Sunrise Professional Building	City Centre	Administrative Services	Business associations	500
ROYAL CANADIAN LEGION	Sunrise Professional Building	City Centre	Civic & Social Organizations	Civic & social organizations	2,500
SPRUCE GROVE ACCUPUNCTURE	Sunrise Professional Building	City Centre	Medical Services	Offices of physical, occupational & speech therapists & audiologists	1,000
WELCO INSPECTIONS	Sunrise Professional Building	City Centre	Professional Services	Engineering services	1,000
YBERG INVESTMENTS	Sunrise Professional Building	City Centre	Finance/Insurance/Real Estate Services	Investment advise	1,000
ATB FINANCIAL	Triton Building	City Centre	Finance/Insurance/Real Estate Services	Personal & commercial banking industry	2,000
CERA-TECH 3D LAB & WHITENING	Triton Building	City Centre	Medical Services	Offices of dentists	1,500
SELJAX	Triton Building	City Centre	Computer Services	Computer system design & services	5,000
VACANT (Unit 204)	Triton Building	City Centre	VACANT		3,910
VACANT (Unit 205 A)	Triton Building	City Centre	VACANT		1,209
VACANT (Unit 205)	Triton Building	City Centre	VACANT		800
CAMPBELL DENTAL CENTRE	Village Business Centre	City Centre	Medical Services	Offices of dentists	1,000
PARKLAND DAY HOME - CARING FOR CHILDREN	Village Business Centre	City Centre	Administrative Services	Child daycare services	1,500
ALBERTA EMPLOYMENT & IMMIGRATION	Westgrove Professional Building	City Centre	Administrative Services	Immigration services	1,000
ASPIRO PSYCHOLOGY	Westgrove Professional Building	City Centre	Medical Services	Offices of physical, occupational & speech therapists & audiologists	1,000
BREDIN INSTITUTE WORK SOURCE	Westgrove Professional Building	City Centre	Administrative Services	Vocational rehabilitation services	1,000
CASHCO	Westgrove Professional Building	City Centre	Finance/Insurance/Real Estate Services	Investment advise	1,000
DR. LORI BAMBER CHIROPRACTIC	Westgrove Professional Building	City Centre	Medical Services	Offices of chiropractors	1,000
JIM DUNN & ASSOCIATES	Westgrove Professional Building	City Centre	Professional Services	Investment advise	1,000
MAIN STREET FAMILY LAW CENTRE	Westgrove Professional Building	City Centre	Professional Services	Offices of lawyers	1,000
PRIMERICA FINANCIAL SERVICES	Westgrove Professional Building	City Centre	Finance/Insurance/Real Estate Services	Investment advise	1,000
SPRUCE GROVE CHILD & FAMILY SERVICES	Westgrove Professional Building	City Centre	Administrative Services	Family planning	1,000
STRANGWAY & HENNING	Westgrove Professional Building	City Centre	Professional Services	Offices of lawyers	1,000
STRONG THERAPIES	Westgrove Professional Building	City Centre	Medical Services	Offices of physical, occupational & speech therapists & audiologists	1,000
TRC REALTY MANAGEMENT	Westgrove Professional Building	City Centre	Finance/Insurance/Real Estate Services	Offices of real estate agents & brokers	1,000
WORKSOURCE LABOUR	Westgrove Professional Building	City Centre	Administrative Services	Vocational rehabilitation services	1,000

Office Business Name	Identified Office Node	General Office Category	NAICS Code	NAICS Description	Est. Area (SF)
CORRINE WILKES ACCOUNTING & TAX	Westgrove Drive South	Hwy 16 Auto & Hardware	Finance/Insurance/Real Estate Services	Investment advise	1,000
SPRUCE GROVE SOCCER ASSOCIATION	Westgrove Drive South	Hwy 16 Auto & Hardware	Civic & Social Organizations	Business associations	2,500
VACANT (second floor)	Westgrove Drive South	Hwy 16 Auto & Hardware	VACANT		1,000
A SACRED JOURNEY PSYCHOLOGY SERVICES	Century Rd Plaza	Neighbourhood Convenience	Medical Services	Offices of mental health practitioners (except physicians)	500
NEXT STEP OFFSITE MEDICAL	Century Rd Plaza	Neighbourhood Convenience	Medical Services	Offices of physicians	1,000
POLKA DOT DAYCARE	Century Rd Plaza	Neighbourhood Convenience	Childcare Services	Child daycare services	3,000
ROGERS BOOKKEEPING SERVICES	Century Rd Plaza	Neighbourhood Convenience	Finance/Insurance/Real Estate Services	Offices of accountants	500
DISCOVERY LAND DAYCARE	Deer Park Centre	Neighbourhood Convenience	Childcare Services	Child daycare services	2,000
ALPHA TRANSLATIONS	Hillside Centre	Neighbourhood Convenience	Educational Services	Language schools	750
AVALON GLOBAL E-BUSINESS	Hillside Centre	Neighbourhood Convenience	Computer Services	Computer system design & services	2,000
DR GREG WENDELL DENTISTRY	Hillside Centre	Neighbourhood Convenience	Medical Services	Offices of dentists	1,500
HUB LEGAL	Hillside Centre	Neighbourhood Convenience	Professional Services	Offices of lawyers	750
SPRUCE GROVE ACUPUNCTURE	Hillside Centre	Neighbourhood Convenience	Medical Services	Offices of all other health practitioners	1,000
TRI MUNICIPAL VETERINARIAN CENTRE	Hillside Centre	Neighbourhood Convenience	Professional Services	Veterinarian services	1,250
VACANT Unit 204	Hillside Centre	Neighbourhood Convenience	VACANT		768
VACANT Unit 206	Hillside Centre	Neighbourhood Convenience	VACANT		1,116
WESTERN FINANCIAL GROUP	Hillside Centre	Neighbourhood Convenience	Finance/Insurance/Real Estate Services	Investment advise	1,000
BEAR FAMILY CHILDRENS CENTRE	Woodhaven Plaza	Neighbourhood Convenience	Childcare Services	Child daycare services	3,000
EYE SELECT	Sunrise Towne Square	Power Centre Retail	Medical Services	Offices of optometrists	1,000
FAIRSTONE FINANCIAL	Sunrise Towne Square	Power Centre Retail	Finance/Insurance/Real Estate Services	Investment advise	1,000
GROVE MEDICAL CENTRE	Sunrise Towne Square	Power Centre Retail	Medical Services	Offices of physicians	1,500
HORIZON ORTHODONTICS	Sunrise Towne Square	Power Centre Retail	Medical Services	Offices of dentists	2,000
PARKLAND MASSAGE	Walmart Centre	Power Centre Retail	Medical Services	Other personal services	1,200
SUNRISE PHYSICAL THERAPY	Sunrise Towne Square	Power Centre Retail	Medical Services	Offices of physical, occupational & speech therapists & audiologists	1,250
PARKLAND RESPIRATORY CARE	Sunrise Towne Square	Power Centre Retail	Medical Services	Offices of physicians	1,200
PARKLAND VETERINARIAN CLINIC	Walmart Centre	Power Centre Retail	Professional Services	Veterinarian services	2,000
SMILE SPOT ORTHODONTICS	Walmart Centre	Power Centre Retail	Medical Services	Offices of dentists	1,500
SPRUCE GROVE PHYSICAL THERAPY	Walmart Centre	Power Centre Retail	Medical Services	Offices of physical, occupational & speech therapists & audiologists	1,000
MONTGOMERY LAW	Nelson Centre	Tri Leisure Village Area	Professional Services	Offices of lawyers	5,796
SPRUCE RIDGE DENTAL	Spruce Ridge Centre	Tri Leisure Village Area	Medical Services	Offices of dentists	2,500
TRI WELLNESS MD CENTRE	Tri-Wellness Centre	Tri Leisure Village Area	Medical Services	Offices of physicians	1,000
VACANT (second floor NEW)	Tri-Wellness Centre	Tri Leisure Village Area	VACANT		10,940
VACANT (second floor NEW)	Tri-Wellness Centre	Tri Leisure Village Area	VACANT		13,434

Office Business Name	Identified Office Node	General Office Category	NAICS Code	NAICS Description	Est. Area (SF)	
EXPERT DRIVING SCHOOL	14 McLeod Ave	Westland Market	Administrative Services	611510	Technical & trade schools	750
REALTY EXECUTIVES	14 McLeod Ave	Westland Market	Finance/Insurance/Real Estate Services	531210	Offices of real estate agents & brokers	1,500
JENALDI HOMES	Centre 16	Westland Market	Professional Services	236110	Residential building construction	1,500
POWER ENGINEERING PREPARATION	Centre 16	Westland Market	Medical Services	621210	Offices of dentists	1,000
RONALD HAINES FAMILY DENTISTRY	Centre 16	Westland Market	Medical Services	621210	Offices of dentists	2,000
VACANT	Centre 16	Westland Market	VACANT			1,261
VACANT	Centre 16	Westland Market	VACANT			2,774
CV TAX SERVICE	Cumbria Centre	Westland Market	Finance/Insurance/Real Estate Services	541213	Tax preparation services	1,000
KVC OILFIELD MAINTENANCE LTD	Cumbria Centre	Westland Market	Professional Services	541330	Engineering services	1,000
PATTY LOU CUMBY INSURANCE BROKERS	Cumbria Centre	Westland Market	Finance/Insurance/Real Estate Services	524210	Insurance agencies & brokerages	1,200
RANDALL C HELL LAW OFFICE	Cumbria Centre	Westland Market	Professional Services	541110	Offices of lawyers	2,000
SUN LIFE FINANCIAL	Cumbria Centre	Westland Market	Finance/Insurance/Real Estate Services	523930	Investment advise	1,000
VACANT	Cumbria Centre	Westland Market	VACANT			4,000
WESTSIDE MIDWIVES	Cumbria Centre	Westland Market	Medical Services	621390	Offices of all other health practitioners	500
ASSOCIATION FOR SUPPORTED COMMUNITY	Karo Centre	Westland Market	Administrative Services	621410	Family planning	2,000
KARO DENTAL	Karo Centre	Westland Market	Medical Services	621210	Offices of dentists	2,500
YAKIMISHYN & JAKEMAN TAX TIME	Karo Centre	Westland Market	Finance/Insurance/Real Estate Services	523930	Investment advise	1,206
FROM PLAY TO WORDS	McLeod Centre	Westland Market	Medical Services	621340	Offices of physical, occupational & speech therapists & audiologists	1,000
HAYES DENTIST	McLeod Centre	Westland Market	Medical Services	621210	Offices of dentists	1,000
ROBERT & JOLY LAW OFFICE	McLeod Centre	Westland Market	Professional Services	531210	Offices of real estate agents & brokers	1,000
SPRUCE GROVE CHIROPRACTICE CENTRE	McLeod Centre	Westland Market	Medical Services	621310	Offices of chiropractors	1,000
REMAX	Westgrove Drive North	Westland Market	Finance/Insurance/Real Estate Services	531210	Offices of real estate agents & brokers	2,000
ROBINSON & COMPANY LAWYERS	Westgrove Drive North	Westland Market	Professional Services	541110	Offices of lawyers	1,500
VACANT (Unit 230)	Westgrove Drive North	Westland Market	VACANT			2,388
BRIGHTSMILE DENTAL (DENTACARE)	Westland Market Mall	Westland Market	Medical Services	621210	Offices of dentists	2,361
DR MILTON OPTOMETRIST	Westland Market Mall	Westland Market	Medical Services	623120	Offices of optometrists	2,063
EXELBY & PARTNERS	Westland Market Mall	Westland Market	Professional Services	523930	Investment advise	417
GROVE HEARING CLINIC	Westland Market Mall	Westland Market	Medical Services	621340	Offices of physical, occupational & speech therapists & audiologists	1,141
SPRUCE GROVE DENTURE CLINIC	Westland Market Mall	Westland Market	Medical Services	621210	Offices of dentists	1,245
SYLVAN LEARNING	Westland Market Mall	Westland Market	Educational Services	611710	Educational support services	1,711
WESTLAND FAMILY PRACTICE	Westland Market Mall	Westland Market	Medical Services	621110	Offices of physicians	4,278
BEST FRIENDS ANIMAL HOSPITAL	Westway Road	Westland Market	Professional Services	541940	Veterinarian services	1,000
CENTURY DAYCARE	Westwind - Longview Drive	Westwind	Childcare Services	624410	Child daycare services	4,000
LEASED WESTWIND PLAZA - NEW BLDG#1	Westwind Drive	Westwind	VACANT			13,458
VACANT WESTWIND PLAZA - NEW BLDG#1	Westwind Drive	Westwind	VACANT			14,358
VACANT WESTWIND PLAZA - NEW BLDG#2	Westwind Drive	Westwind	VACANT			14,358
VACANT WESTWIND PLAZA - NEW BLDG#2	Westwind Drive	Westwind	VACANT			14,358

Retailer / Tenant Type	Merchandise Category	Number of Responses
Tire/Oil Change	Auto Parts, Services & Accessories	1
Pick n Pull Auto	Auto Parts, Services & Accessories	1
Toyota Dealership	Auto/RV/Motorsports	3
Princess Auto	Auto/RV/Motorsports	2
Kia Dealership	Auto/RV/Motorsports	1
Honda Dealership	Auto/RV/Motorsports	1
Harley Davidson	Auto/RV/Motorsports	1
Chapter's/ Indigo	Books & Multi-Media	8
HMV	Books & Multi-Media	7
Coles	Books & Multi-Media	1
Carter's	Clothing & Apparel	18
Women's Clothing	Clothing & Apparel	12
American Eagle	Clothing & Apparel	11
Old Navy	Clothing & Apparel	8
Laura's	Clothing & Apparel	6
Garage	Clothing & Apparel	6
Addition Elle	Clothing & Apparel	6
Men's Clothing	Clothing & Apparel	5
H&M	Clothing & Apparel	4
The Gap	Clothing & Apparel	3
Suzanne's Dress Shop	Clothing & Apparel	3
Stitches	Clothing & Apparel	3
Justice	Clothing & Apparel	3
Hollister & Co	Clothing & Apparel	3
Anthropologie	Clothing & Apparel	3

# C APPENDIX | CONSUMER SURVEY OPEN-ENDED RETAILER RESPONSES

(from 2015 Survey Results)

Retailer / Tenant Type	Merchandise Category	Number of Responses
West 49	Clothing & Apparel	2
Urban Planet	Clothing & Apparel	2
Tommy Hilfiger	Clothing & Apparel	2
Smons	Clothing & Apparel	2
North Face	Clothing & Apparel	2
Lululemon Athletica	Clothing & Apparel	2
Iviva	Clothing & Apparel	2
zumi	Clothing & Apparel	1
TJMaxx	Clothing & Apparel	1
Tip Top Tailors	Clothing & Apparel	1
The Bay	Clothing & Apparel	1
Ross	Clothing & Apparel	1
Quicksilver	Clothing & Apparel	1
Pennington's	Clothing & Apparel	1
Osh Kosh	Clothing & Apparel	1
Norther Reflections	Clothing & Apparel	1
Moores	Clothing & Apparel	1
Mexx	Clothing & Apparel	1
Melanie Lyne	Clothing & Apparel	1
Long Tall Sally	Clothing & Apparel	1
Le Chateau	Clothing & Apparel	1
La Vie en Rose	Clothing & Apparel	1
La Senza	Clothing & Apparel	1
JMichael's	Clothing & Apparel	1
Hot Topic	Clothing & Apparel	1
Giant Tiger	Clothing & Apparel	1
Gap Kids	Clothing & Apparel	1
Eddie Bauer	Clothing & Apparel	1
Comex	Clothing & Apparel	1
Bryan's	Clothing & Apparel	1
Bluenotes	Clothing & Apparel	1
Below the Belt	Clothing & Apparel	1
Adidas	Clothing & Apparel	1

Retailer / Tenant Type	Merchandise Category	Number of Responses
Bowling Alley	Entertainment & Leisure	26
Movie Theatre	Entertainment & Leisure	11
Indoor Mini Golf	Entertainment & Leisure	5
Laser Tag	Entertainment & Leisure	4
Local Pub	Entertainment & Leisure	3
Indoor Playground	Entertainment & Leisure	3
Chuck E Cheese	Entertainment & Leisure	3
Arcade & Game Room	Entertainment & Leisure	2
Wine Bar	Entertainment & Leisure	1
Night Club	Entertainment & Leisure	1
Live Music	Entertainment & Leisure	1
Dinner Theatre	Entertainment & Leisure	1
Shoe Store	Footwear	8
Aldo	Footwear	6
Spring	Footwear	5
Nike	Footwear	4
Foot Locker	Footwear	2
Town Shoes	Footwear	1
Sterling Shoes	Footwear	1
Soft Moc	Footwear	1
Runner's World	Footwear	1
Mayfield Shoes	Footwear	1
Ecco	Footwear	1
Clark's	Footwear	1
Champs	Footwear	1
Cedar Shoe	Footwear	1



Retailer / Tenant Type	Merchandise Category	Number of Responses
The Keg	Full Service F&B	38
Olive Garden	Full Service F&B	25
Ethnic Fare	Full Service F&B	17
Montana's Cookhouse	Full Service F&B	14
Earl's	Full Service F&B	14
Red Lobster	Full Service F&B	13
Local Fine Dining	Full Service F&B	13
Moxies	Full Service F&B	11
Local Family Restaurants	Full Service F&B	10
Tony Roma's	Full Service F&B	8
Joey's	Full Service F&B	7
Healthy Restaurants	Full Service F&B	7
Cactus Club	Full Service F&B	7
Chili's	Full Service F&B	5
Red Robin	Full Service F&B	3
Humpty's	Full Service F&B	3
Cora's	Full Service F&B	3
Outback Steakhouse	Full Service F&B	2
Original Joes	Full Service F&B	2
Old Spaghetti Factory	Full Service F&B	2
Local Italian	Full Service F&B	2
I-Hop	Full Service F&B	2
Firestone Grill	Full Service F&B	2
Caesar's Steachouse	Full Service F&B	2
Denny's	Full Service F&B	1
Brazilian Steakhouse	Full Service F&B	1
Costco	General Merchandise	50
London Drugs	General Merchandise	4
Target	General Merchandise	3
Value Village	General Merchandise	2
Sears	General Merchandise	1
Wine & Cheese Store	Grocery & Specialty Foods	2
Trader Joes	Grocery & Specialty Foods	1
Sunterra Foods	Grocery & Specialty Foods	1
Organic Food Store	Grocery & Specialty Foods	1
Fish/Meat Market	Grocery & Specialty Foods	1
Bakery	Grocery & Specialty Foods	1

Retailer / Tenant Type	Merchandise Category	Number of Responses
Crabtree & Evelyn	Health & Beauty	7
Future Shop	Home Electronics & Appliances	31
Best Buy	Home Electronics & Appliances	21
Apple	Home Electronics & Appliances	5
Home Sense	Home Furnishings & Accessories	11
IKEA	Home Furnishings & Accessories	7
Pier 1	Home Furnishings & Accessories	5
The Brick Warehouse	Home Furnishings & Accessories	4
Bed Bath & Beyond	Home Furnishings & Accessories	3
Homestead Creations	Home Furnishings & Accessories	2
Home Outfitters	Home Furnishings & Accessories	2
Lowe's	Home Improvement & Gardening	7
Tim Hortons	Limited Service F&B	11
Unique Coffee Shops	Limited Service F&B	3
Starbucks	Limited Service F&B	3
Soda Jerks	Limited Service F&B	3
Mongolian Grill	Limited Service F&B	3
Java Muma	Limited Service F&B	2
Burger King	Limited Service F&B	2
Sorrentino's	Limited Service F&B	1
Sonic Drive In	Limited Service F&B	1
Popeyes	Limited Service F&B	1
Mucho Burrito	Limited Service F&B	1
Jack in the Box	Limited Service F&B	1
Greek	Limited Service F&B	1
Five Guys Burger & Fries	Limited Service F&B	1
Cactus Jack's	Limited Service F&B	1
Childcare	Personal Services	3
Tattoo	Personal Services	1
Hair Salons	Personal Services	1
Day Spa	Personal Services	1
Dentists	Professional Services	2
Law Offices	Professional Services	1
Hospital	Professional Services	1
Doctors	Professional Services	1

Retailer / Tenant Type	Merchandise Category	Number of Responses
Water Park	Recreation	2
Swimming Pool	Recreation	2
Soccer Fields	Recreation	2
Roller Rink	Recreation	2
Walking Park	Recreation	1
Racquetball Court	Recreation	1
Horizon Stage	Recreation	1
Dog Park	Recreation	1
Craft/Hobby/Art Store	Specialty Retail	6
Office Depot	Specialty Retail	5
Welsh's Saddle	Specialty Retail	2
Jersey City	Specialty Retail	2
Teavana	Specialty Retail	1
Staples	Specialty Retail	1
Kinko's FedEx	Specialty Retail	1
Fabricland	Specialty Retail	1
Disney Store	Specialty Retail	1
Dollar Store	Specialty Retail	1
Cabela's	Sporting Goods & Outdoor Recreation	9
United Cycle	Sporting Goods & Outdoor Recreation	7
Pro Hockey Life	Sporting Goods & Outdoor Recreation	3
Bass Pro Shops	Sporting Goods & Outdoor Recreation	2
Atmosphere	Sporting Goods & Outdoor Recreation	2
Wholesale Sports Outfitters	Sporting Goods & Outdoor Recreation	1
Western Cycle	Sporting Goods & Outdoor Recreation	1
Sport Mart	Sporting Goods & Outdoor Recreation	1
Mountain Equipment Coop	Sporting Goods & Outdoor Recreation	1
Home Run Sports	Sporting Goods & Outdoor Recreation	1
Golf Store	Sporting Goods & Outdoor Recreation	1
ToysRUs	Toys & Hobbies	12
Transit		4

HERE  
WE  
GROW



CUSHING  
TERRELL  
ARCHITECTURE INC.