MAY 2016

RETAIL MARKET & GAP ANALYSIS

PREPARED FOR

THE CITY OF GRANDE prairie ALBERTA

RESOURCEFUL SPIRIT, GROWING OPPORTUNITY

PREPARED BY

CUSHING TERRELL ARCHITECTURE INC.

RETAIL Market & Gap Analysis

City of Grande Prairie
Alberta

CUSHING TERRELL ARCHITECTURE INC.

keyfax market research

Member of International Council of Shopping Centers

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i PREFACE

Cushing Terrell Architecture Inc. ("Cushing Terrell") was commissioned by the City of Grande Prairie in December 2015 to conduct a Retail Market and Gap Analysis for the City's retail sector. This study provides an update to a previous study conducted in 2014.

The study was carried out over the period December 2015 to April 2016.

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

Retail spending (i.e. Demand) and the City's retail inventory and its corresponding productivity (i.e. Supply) was supported by a detailed Consumer Intercept Survey conducted by Keyfax Market Research in February 2016 to further identify gaps in Grande Prairie's current provision of shops and services.

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

Reference material for this report was obtained from, but not limited to The City of Grande Prairie, Commercial Real Estate Brokerage Firms, Conference Board of Canada, Grande Prairie Chamber of Commerce, Local Commercial Developers, International Council of Shopping Centers 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, nor can they account for future economic uncertainties, but that they have been prepared conscientiously and objectively on the basis of information obtained during the course of this study.

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

This analysis was conducted by 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 Grande Prairie

Cushing Terrell Architecture Inc. - April 2016

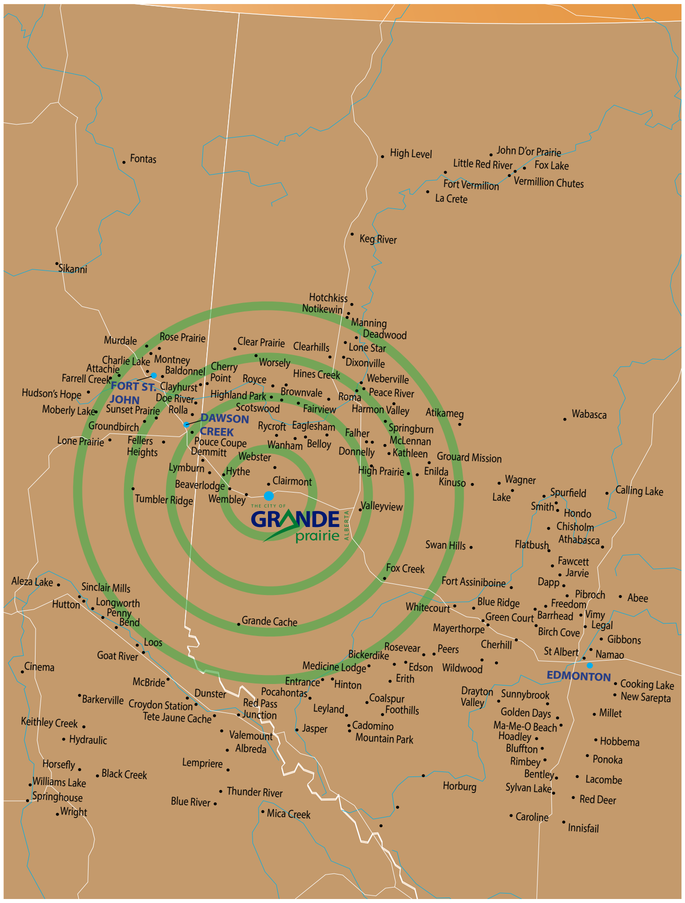
ii EXECUTIVE SUMMARY

INTRODUCTION

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

LOCATION CONTEXT SUMMARY

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



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

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

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

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

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

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

ii EXECUTIVE SUMMARY

RETAIL TRADE AREA SUMMARY

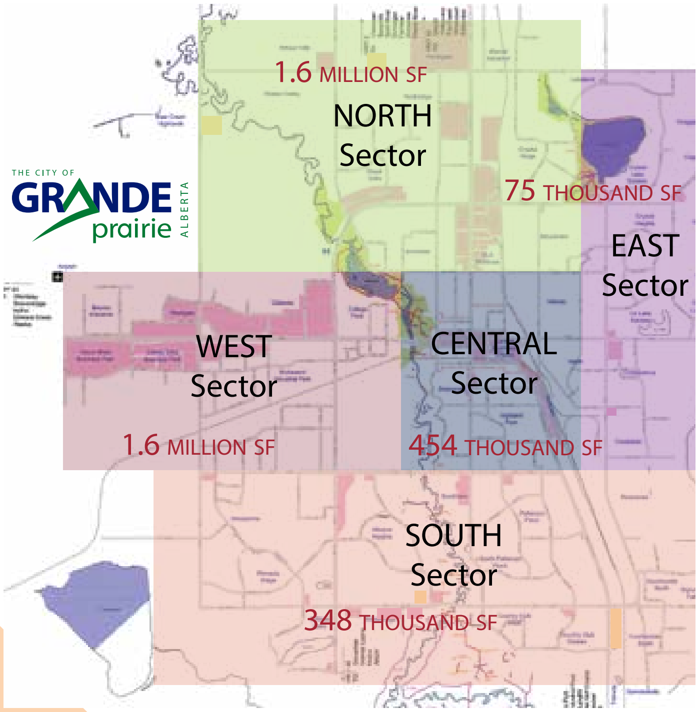
The Total Trade Area penetrates approximately 280,000 residents, which is forecast to grow by a further 12,000 over the next decade.

The Primary Trade Area alone has over 167,000 residents including the City of Grande Prairie, and will be the focal point for future population growth.

The Total Trade Area within an approximate 2 hour drive time has a retail spending catchment estimated at $3.7 Billion in 2016.

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

RETAIL SUPPLY SUMMARY



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

The current city retail inventory, which is quantified and estimated on a category-by-category and sector-by-sector basis to be just over 4.0 million sf, would not in isolation be supported by the City of Grande Prairie residents alone.

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

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

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

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

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

EXECUTIVE SUMMARY

RETAIL DEMAND SUMMARY

Total demand for retail floorspace in the City of Grande Prairie attributable to Primary and Secondary Trade Area residents is estimated at approximately 5.02 million sf.

When compared against the current estimated retail inventory or supply at 4.06 million sf, the difference between demand and supply equates to almost 958,000 sf of residual retail demand that could be supported in the City of Grande Prairie.

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

The City of Grande Prairie has a net inflow of Retail Sales in the magnitude of $532 million.

CONSUMER SURVEY SUMMARY

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

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

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

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

The types of tenants sought by respondents combined with their spending patterns suggests that major locations capable of fulfilling retailer site location requirements will fall in the West Sector, North Sector and to a lesser degree the South Sector.

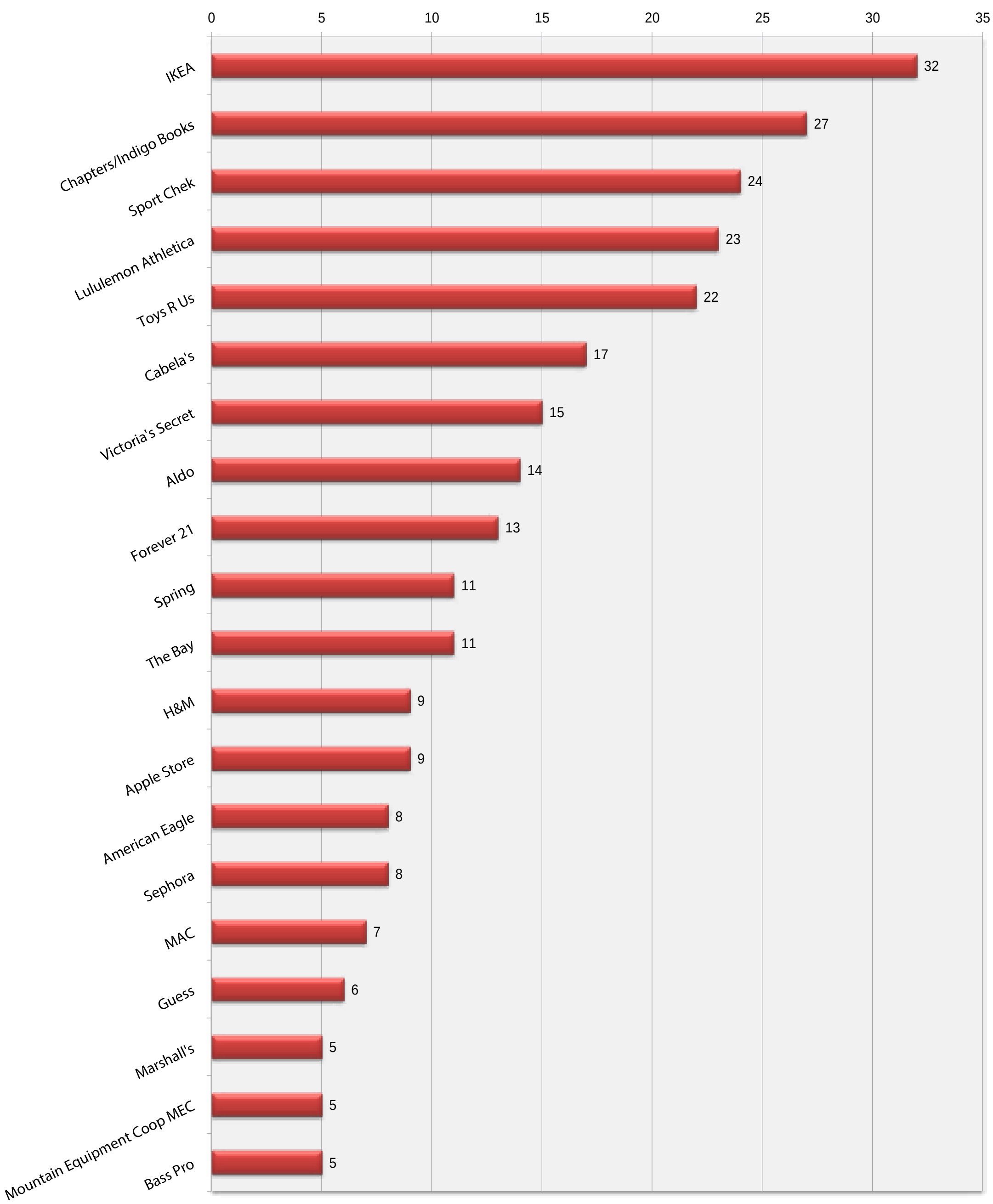
In the North Sector, the Prairie Mall must ensure that its merchandise positioning and layout strategy continues to evolve so that it can be in the best position to attract the progressive types of tenants that respondents identified in the Survey and for which Grande Prairie is a compatible market, while at the same time competing with the evolving comparison merchandise offered at Westgate.

The Downtown area will no doubt continue to face external pressures resulting from continued growth on the fringe of the City. The Downtown is still recognized as a key node that can accommodate future tenant opportunities, particularly in the Entertainment and Food & Beverage categories.

The most significant appeal of Grande Prairie'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 Grande Prairie's 280,000 person trade area and validation from the Consumer Intercept Survey, the Grande Prairie market is well-positioned for growth.

Retailers (Non-Restaurant) Desired in Grande Prairie



ii EXECUTIVE SUMMARY

South 40, Grande Prairie. Photo: Kieron Hunt

ii EXECUTIVE SUMMARY

CONCLUSION

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

FACT City of Grande Prairie serves a Total Trade Area of over 280,000 residents.

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

FACT City of Grande Prairie's Primary Trade Area has over 167,000 residents.

FACT City of Grande Prairie could support over 5.0 million sf of retail floorspace.

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

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

FACT City of Grande Prairie has a net INFLOW of $530 million in Retail Sales.

FACT City of Grande Prairies sales attraction and retention results in only $39 million in retail sales OUTFLOW for specific categories.

FACT City of Grande Prairie has a current residual demand for 958,000 sf of retail space.

FACT City of Grande Prairie could have demand for an additional 1.5 million sf of new retail space by 2026.

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

FACT Consumer Survey Respondents specefically want IKEA, Chapters, Red Lobster and Olive Garden.

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

Downtown Grande Prairie. Photo: Kieron Hunt

1 INTRODUCTION

1.1 SCOPE OF STUDY & PROJECT BACKGROUND

Cushing Terrell Architecture Inc. ("Cushing Terrell") was commissioned by the City of Grande Prairie in December 2015 to conduct an updated Retail Market and Gap Analysis for the City's retail sector.

The study was carried out over the period December 2015 to April 2016.

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

1.2 REPORT STRUCTURE

Cushing Terrell conducted on-the-ground research in December 2015 to supplement and update previous research conducted in 2013/2014 for existing and future retail conditions in the City of Grande Prairie. The purpose of this research was to establish a solid foundation and basis for determining the depth of retail opportunity and associate gaps in the market provision of shops and services.

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

Section 1 - Introduction:
Introduces the study process and structure.

Section 2 - Location Analysis & Site Context:
Lays out the important regional and local context of the City of Grande Prairie as a location in which targeted retailers could express interest.

Section 3 - Retail Trade Area Profile:
Identifies and defines the Primary and Secondary Retail Trade Areas and documents the population and spending profiles generated from within these respective trade areas, against which estimates of floorspace demand can be attributed.

Section 4 - Retail Market Supply:
Assesses the location and characteristics of Grande Prairie's current nodes of retail activity ("Supply"), including developing or future planned retail sites. Fieldwork assessments included identifying and quantifying the entire city's retail inventory by sector, retailer and merchandise category.

Section 5 – Retail Demand & Gap Analysis:
Trade Area spending and sales productivities were estimated resulting in "Demand" associated with each retail category. The "Demand" estimates were then applied against "Supply" to gauge the magnitude of inflow and outflow of retail on a category-by-category basis.

Section 6 – Consumer Intercept Survey:

Westgate Centre, Grande Prairie. Photo: Kieron Hunt

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A Consumer Intercept Survey was conducted in which the residents of Grande Prairie and surrounding communities were interviewed. An in-person questionnaire tool was used to ascertain shopping patterns and consumer preferences for retail tenants and formats in the City of Grande Prairie, including their current spending habits and importance ratings for the types of new retail categories that the City could pursue to enhance the offering and retain spending within the community.

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

1.3
SOURCES OF INFORMATION

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

In addition to research, Consumer Intercept Interviews were also conducted to further supplement the retail supply and leakage quantification analysis.

The following sources of information were used in this Retail Market & Gap Analysis:

- City of Grande Prairie Municipal Census 2015.
- City of Grande Prairie 2008 Growth Study Update, November 2013.
- City of Grande Prairie Municipal Development Plan.
- City of Grande Prairie Land Use Bylaw.
- City of Grande Prairie 2016 Vacant Land Map.
- City of Grande Prairie Traffic Counts.
- Alberta Ministry of Transportation, Highways 1 to 986 Traffic Volume History 2003-2015.
- Pitney Bowes 2016 Demographic Estimates and 2016 CANEx Consumer Expenditure.
- Statistics Canada 2011 Census Baseline Data.
- Conference Board of Canada 2016.
- Keyfax Market Research Consumer Intercept Survey, February 2016.
- Cushing Terrell Architecture Inc. Detailed Retail Inventory Fieldwork, originally conducted December 2013 and updated in-person February 2016.

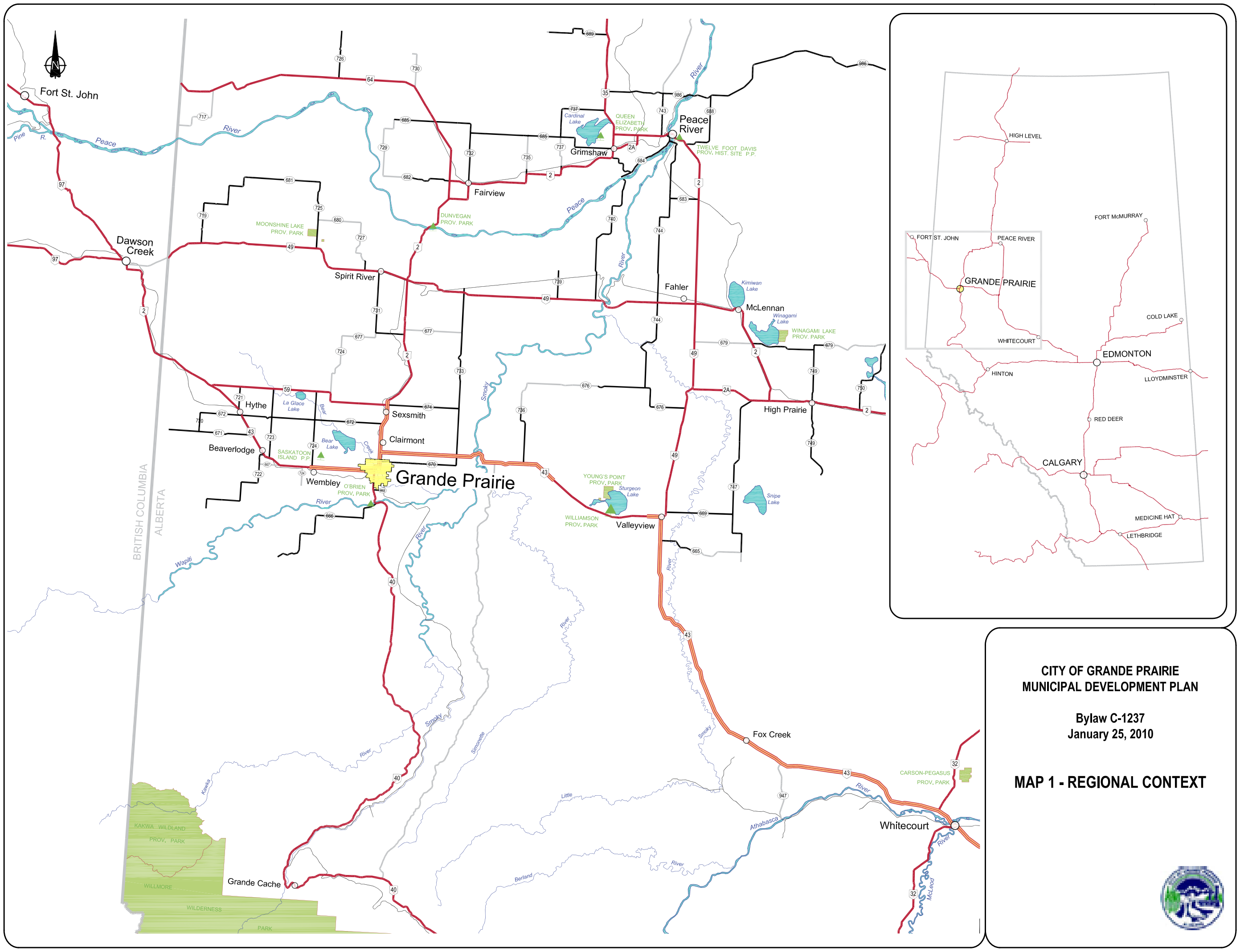
Cushing Terrell would like to thank the following firms and organizations from whom additional information was obtained to provide supplemental retail development, project profiles, market and tenant information:

- Morguard
- WAM Development Group/Wexford
- International Council of Shopping Centers - Alberta Non-Anchored Mall Tenant Retail Sales Productivities
- International Council of Shopping Centers - Canadian Non-Anchored Mall Tenant Retail Sales Productivities
- Conference Board of Canada
- Greentree Land Solutions
- Prudential Land
- KCM Commercial
- Fuse Realty
- Avison Young

Figure 2.1

CITY OF GRANDE REGIONAL CONTEXT MAP

(Source: City of Grande Prairie 2013)



2 LOCATION & CONTEXT

2.1
INTRODUCTION

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

The analysis begins with a macro study of the Grande Prairie regional context whereby the market it serves extends well beyond the City's political boundaries and, as will be demonstrated in this study, extends into northeast British Columbia and as far north as the southern parts of the Northwest Territories.

2.2
REGIONAL CONTEXT

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

Highways 40 and 43, and CN rail connect Grande Prairie to major markets and ports across North America, which provides a strong network for goods movement necessary to support potential multi and chain store retail operations for whom timely access to markets forms an essential part of their store network strategy.

The City conservatively services a trading area of over 280,000 people spanning northwestern Alberta, northeastern British Columbia and the Northwest Territories.

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

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

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

2.3
MUNICIPAL DEVELOPMENT PLAN

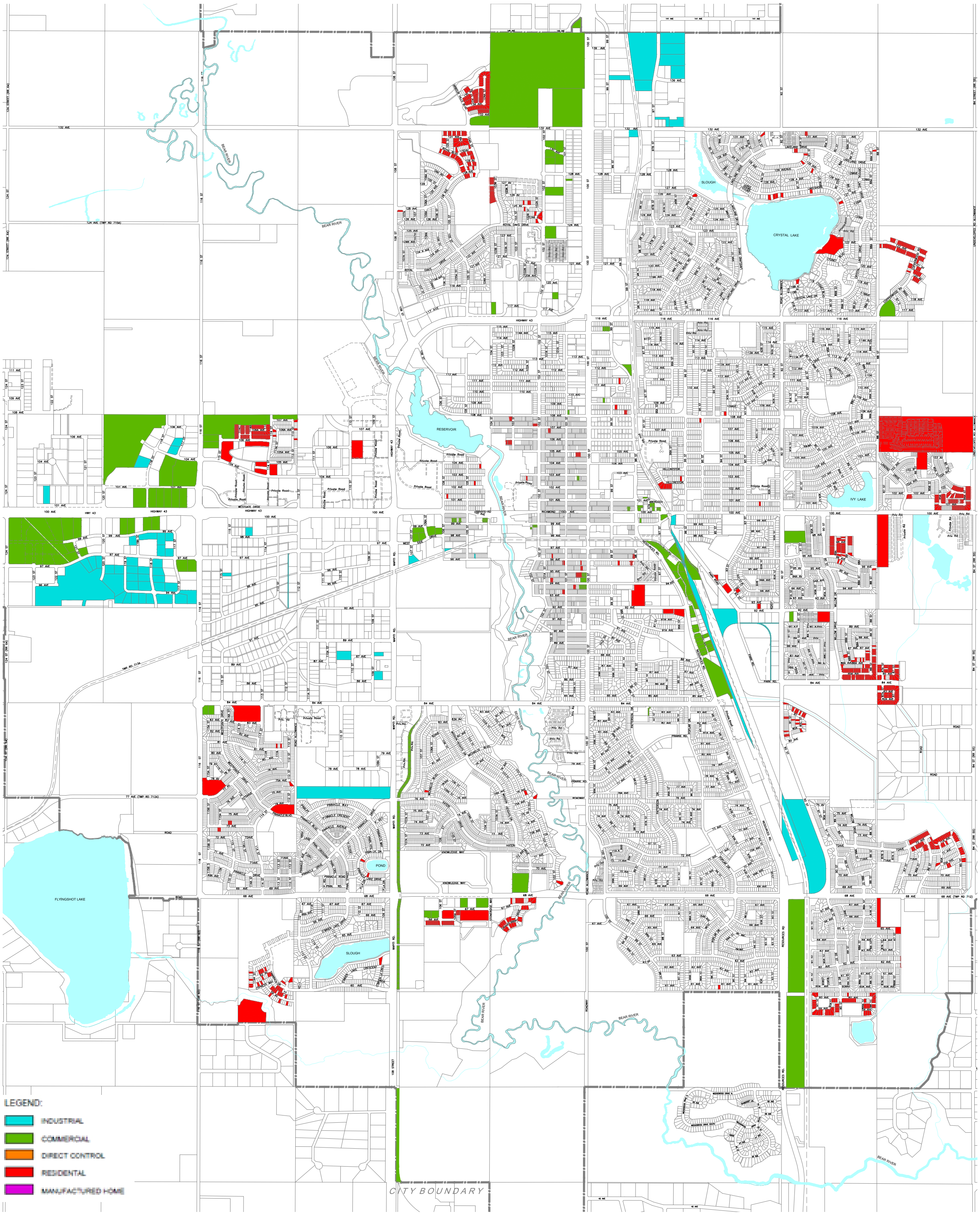
The City of Grande Prairie's Municipal Development Plan (MDP) includes a specific section that addresses the vision for "Commercial Development". As is stated in the MDP, and further validated by fieldwork, the downtown area and former shopping malls, not including Prairie Mall, have become marginalized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

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

Figure 2.2

CITY OF GRANDE PRAIRIE VACANT LAND USE MAP

(Source: City of Grande Prairie 2016)



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

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

The goal of the MDP states:

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

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

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

2.4 VACANT LAND USE CONTEXT

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

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

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

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

2.5 TRANSPORTATION CONTEXT

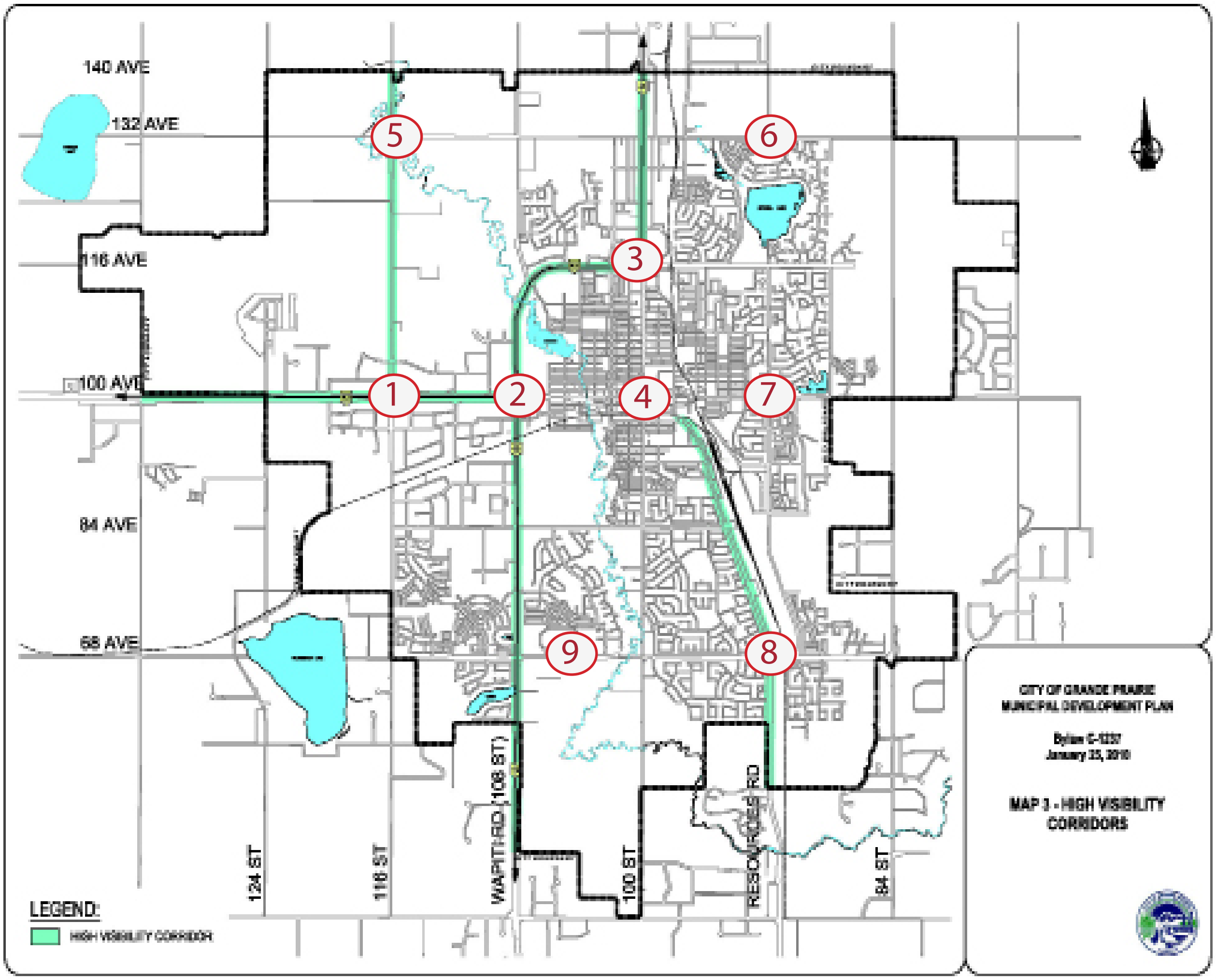
One of the most significant determinants to successful commercial development relates to patterns of transportation. The ability to be accessible as well as visible to high volumes of traffic is a major consideration for retail businesses. For a regional market such as Grande Prairie that attracts a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

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

Figure 2.3

CITY OF GRANDE PRAIRIE HIGH VOLUME TRAFFIC CORRIDORS

(Source: City of Grande Prairie)



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

The Alberta Ministry of Transportation provides traffic counts on the major highways, which for Grande Prairie include Hwy 40 and 43. Referring to **Figure 2.3**, the most recent 2015 traffic counts by the Province illustrated Average Annual Daily Traffic (AADT) at the following intersections:

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

West on Hwy 43 = 18,910
North on Hwy 43 = 9,070
East on 100th Ave = 18,870
South on Hwy 40 = 14,090

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

West on Hwy 43 = 27,050
North on Hwy 43 = 25,540
East on 100th Ave = 24,900
South on Hwy 40 = 25,110

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

West on Hwy 43 = 22,660
North on Hwy 43 = 33,770
East on 116th Ave = 18,650
South on 100th St. = 18,540

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

4) 100th Ave at 100th St. Downtown (2009)

West on 100th Ave = 10,891
North on 100th St. = 13,052
East on 100th Ave = 10,769
South on 100th St. = 14,092

5) 132nd Ave at 116th St. (2015)

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

6) 132nd Ave at 92nd St. (2014)

West on 132nd Ave = 19,255
North on 92nd St. = 3,835
East on 132nd Ave = 22,095
South on 92nd St. = 376

7) 106th Ave at 92nd St. (2011)

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

8) 68th Ave at Resources Road (2009)

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

9) 68th Ave at Stoneridge (2015)

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

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

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

The downtown area is not indicated as a High Volume Traffic Corridor. Nonetheless, traffic counts at the critical nexus of 100th Avenue and 100th Street illustrate a pattern of traffic flow that is strong despite having a pattern of one way streets, which is not truly conducive for successful streetfront retail in a downtown environment.

2.6 BUILDING PERMITS

A review of data on building permits in the City of Grande Prairie over the 5-year period 2010 to year end 2015 illustrates a sustained pattern of development activity, though the current economic climate has led to a downturn in overall building permit activity.

Over the period 2010 to 2015, the City of Grande Prairie continued to exhibit strength and resiliency as evidenced by an average of over 1,205 annual building permits issued for all types of construction (**Figure 2.4**).

Referring to 2015 data, of the 1,197 permits issued, 25% were for residential development (62% single family vs. 38% multi-family), while 2% of permits were for new commercial buildings.

The value of the Building Permits issued has averaged $230 million over the period 2010 to 2015. Although 2015 was a slower year, the $250 million in building permits nonetheless surpassed the past 5 year average.

As of February 2016 Building Permit values are expected to be slower as a result of prevailing provincial economic realities.

Figure 2.4

CITY OF GRANDE PRAIRIE BUILDING PERMITS 2010 - 2015

(Source: City of Grande Prairie 2016)

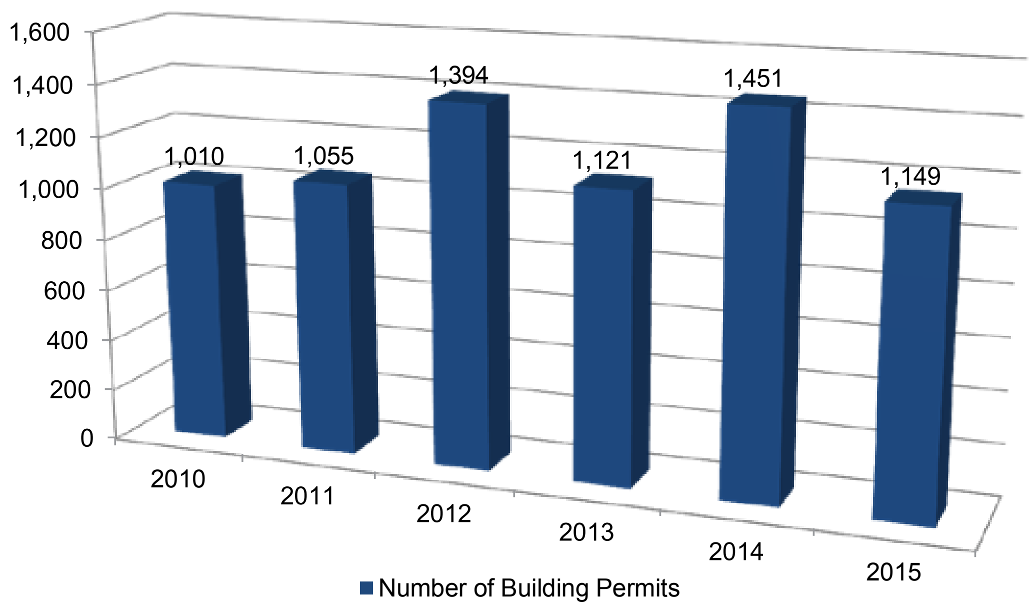
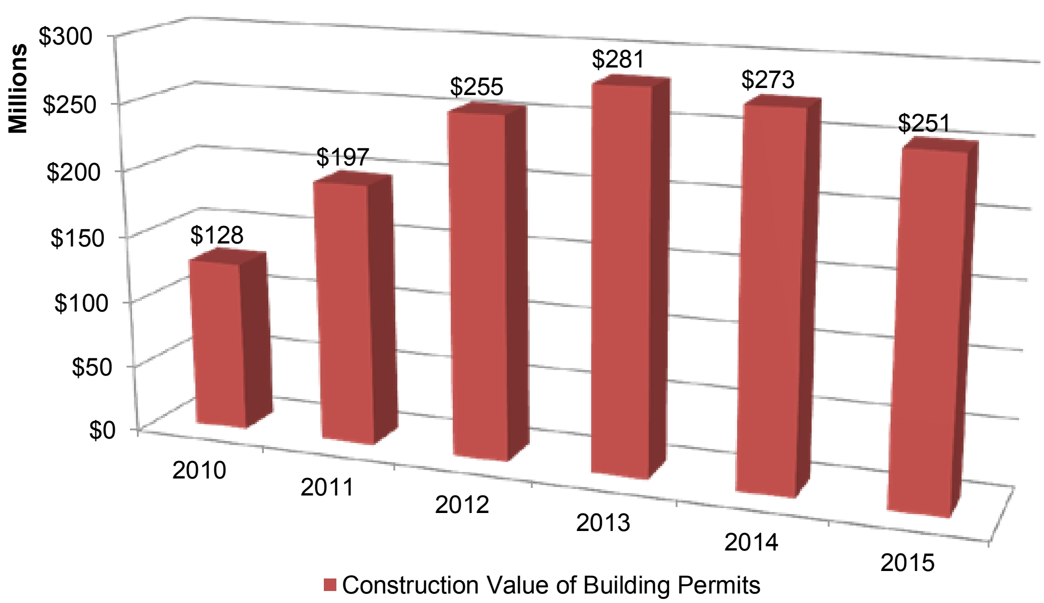


Figure 2.5

CITY OF GRANDE PRAIRIE TOTAL BUILDING PERMITS CONSTRUCTION VALUE 2010 - 2015

(Source: City of Grande Prairie 2016)



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Residential building permits continue to be very robust in the City of Grande Prairie, averaging 459 permits per year over the period 2010 to 2015. Although 2015 witnessed a decline to about half the 2014 values for residential permits (190 single family and 115 multi-family units), 2014 was considered an anomoly as it was the best year on record for residential building permits.

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

Given the current economic situation in the Province, building permit data still indicates a degree of resiliency in the Grande Prairie market overall. It also illustrates a trend towards a more diversified development market as evidenced by the increasing number of multi-family permits, which bodes well for future intensification of areas such as the downtown where multi-family formats will be an integral part of any long term revitalization.

2.7 SUMMARY & IMPLICATIONS

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

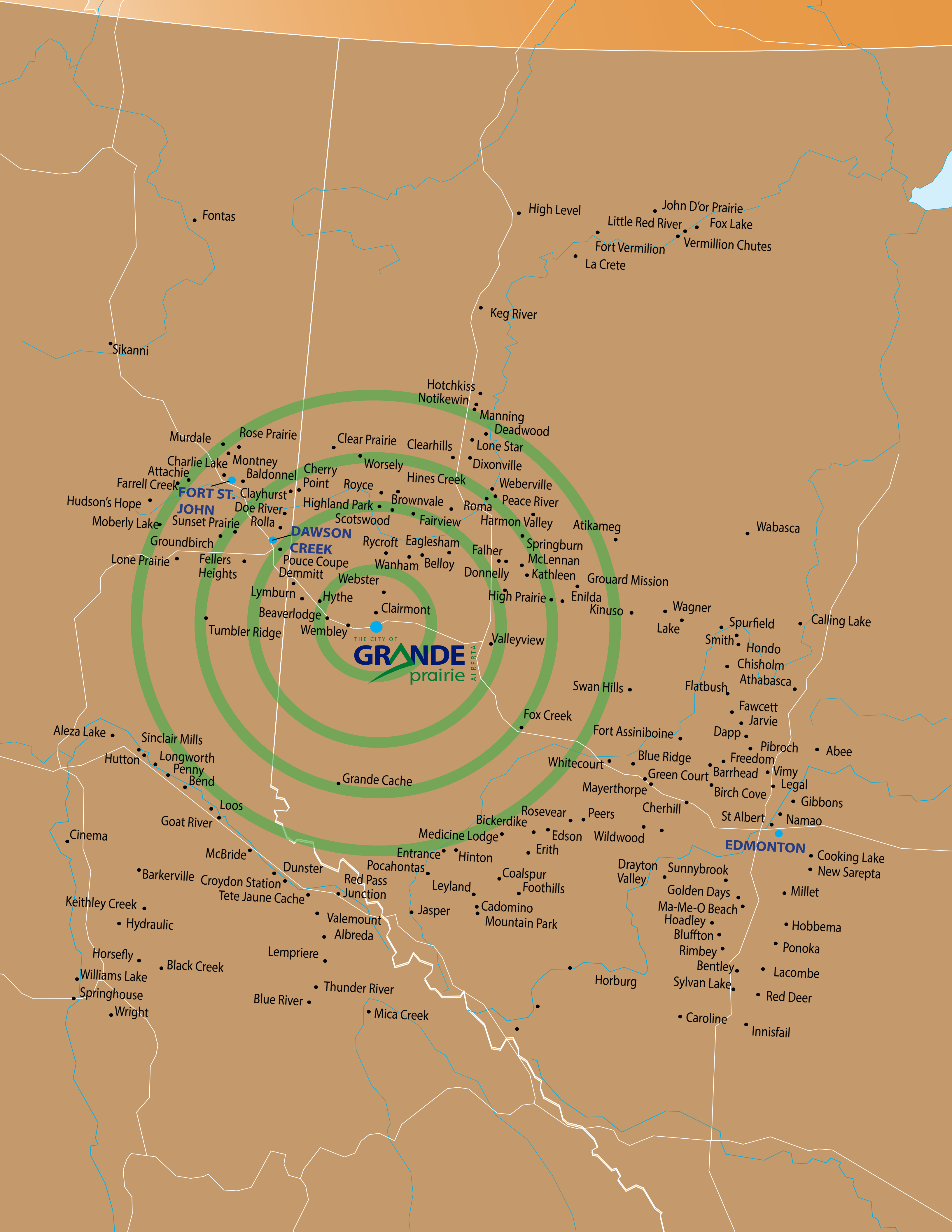
Not only is the city located at the centre of the wider region, the major highway infrastructure and transportation network (including air) converges in and travels through the City.

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

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

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

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



Fontas
High Level
John D'or Prairie
Little Red River
Fox Lake
Fort Vermilion
Vermillion Chutes
La Crete
Keg River
Sikanni
Hotchkiss
Notikewin
Manning
Deadwood
Murdale
Rose Prairie
Clear Prairie
Clearhills
Lone Star
Charlie Lake
Montney
Worsely
Dixonville
Attachie
Baldonnel
Cherry Point
Hines Creek
Farrell Creek
Royce
Weberville
FORT ST. JOHN
Clayhurst
Brownvale
Peace River
Hudson's Hope
Doe River
Highland Park
Roma
Moberly Lake
Sunset Prairie
Rolla
Scotswood
Fairview
Harmon Valley
Atikameg
Wabasca
DAWSON CREEK
Groundbirch
Rycroft
Eaglesham
Springburn
Falher
McLennan
Lone Prairie
Fellers Heights
Pouce Coupe
Wanham
Belloy
Donnelly
Kathleen
Grouard Mission
Demmitt
Webster
Lymburn
Hythe
High Prairie
Enilda
Kinuso
Wagner
Lake
Clairmont
Beaverlodge
Spurfield
Calling Lake
Tumbler Ridge
Wembley
Smith
THE CITY OF
GRANDE
prairie
ALBERTA
Valleyview
Hondo
Chisholm
Athabasca
Swan Hills
Flatbush
Fawcett
Jarvie
Fox Creek
Aleza Lake
Sinclair Mills
Fort Assiniboine
Dapp
Pibroch
Abee
Hutton
Longworth
Penny
Bend
Blue Ridge
Freedom
Whitecourt
Green Court
Barrhead
Vimy
Grande Cache
Mayerthorpe
Legal
Birch Cove
Gibbons
Loos
Cherhill
Goat River
Rosevear
Peers
St Albert
Namao
Bickerdike
Cinema
Medicine Lodge
Edson
Wildwood
EDMONTON
Erith
Entrance
Hinton
Cooking Lake
McBride
Pocahontas
Drayton Valley
Sunnybrook
New Sarepta
Dunster
Barkerville
Red Pass Junction
Coalspur
Croydon Station
Foothills
Golden Days
Millet
Leyland
Tete Jaune Cache
Ma-Me-O Beach
Keithley Creek
Cadomino
Hoadley
Jasper
Mountain Park
Hobbema
Hydraulic
Valemount
Bluffton
Albreda
Ponoka
Rimbey
Horsefly
Lempriere
Bentley
Lacombe
Black Creek
Williams Lake
Horburg
Sylvan Lake
Springhouse
Thunder River
Red Deer
Blue River
Wright
Mica Creek
Caroline
Innisfail

3 RETAIL TRADE AREA PROFILE

3.1 INTRODUCTION

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

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

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

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

Retail Trade Area Determinants

i. Transportation networks, including streets and highways, which affect access, travel times (**Figure 3.1**), commuting and employment distribution patterns;

ii. Major infrastructure projects both planned or under development which will affect future travel patterns;

iii. Growth and development vision, including an understanding of area characteristics and potential target 'audience';

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

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

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

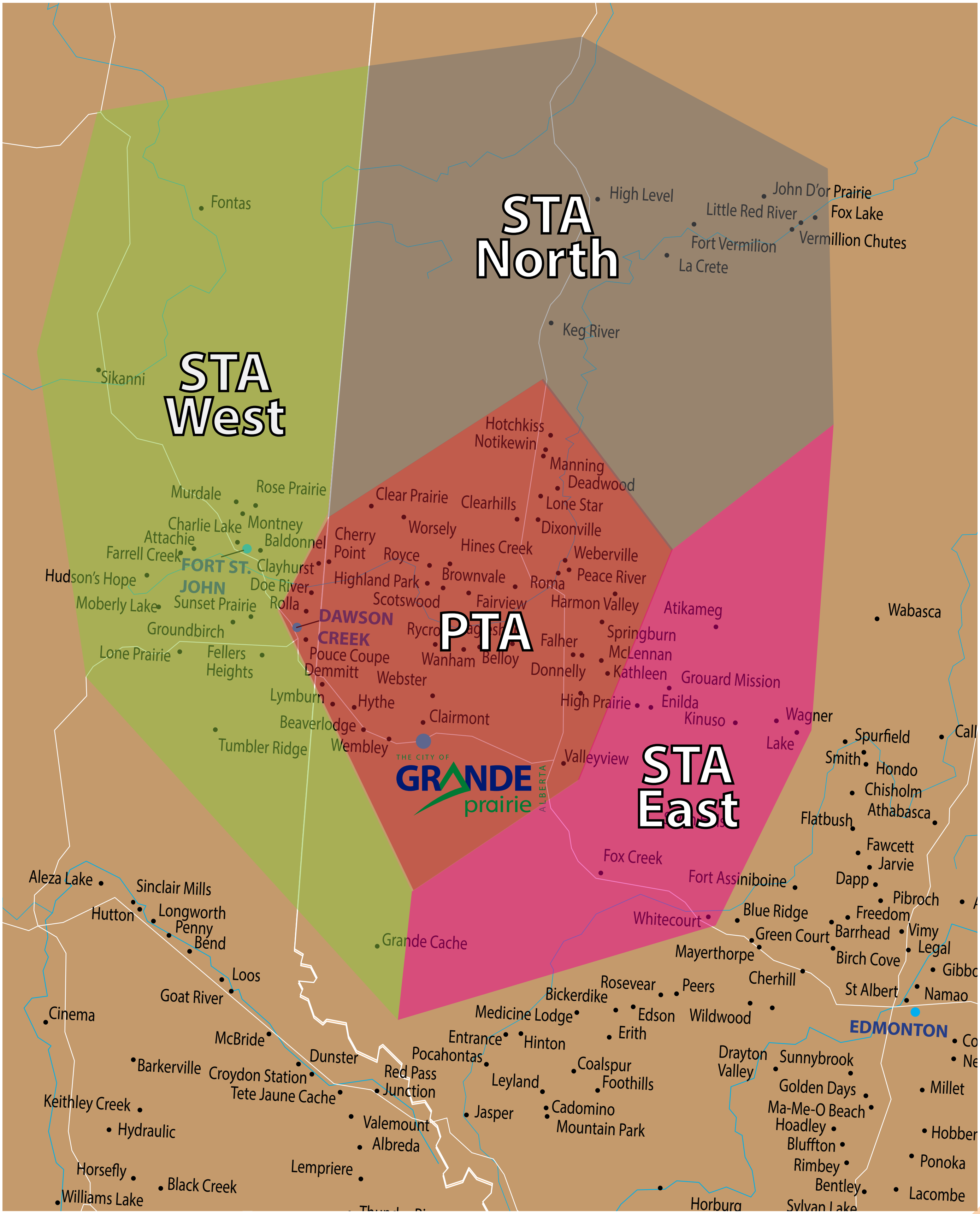
vii. De facto barriers resulting from notable socioeconomic differentiation;

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

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

Figure 3.1

CITY OF GRANDE PRAIRIE RETAIL TRADE AREA



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

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

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

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

For this particular study, the Retail Trade Area shown in **Figure 3.1** has been cross-referenced and further validated by a Consumer Intercept Survey (**Section 6.0**). This Consumer Intercept Survey used postal codes of shoppers in the City to inform, confirm and modify the Trade Area.

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

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

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

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

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

Table 3.1

TRADE AREA POPULATION PROJECTIONS SUMMARY 2016 TO 2026

(Source: City of Grande Prairie, Pitney Bowes 2016, and Cushing Terrell Architecture Inc.)

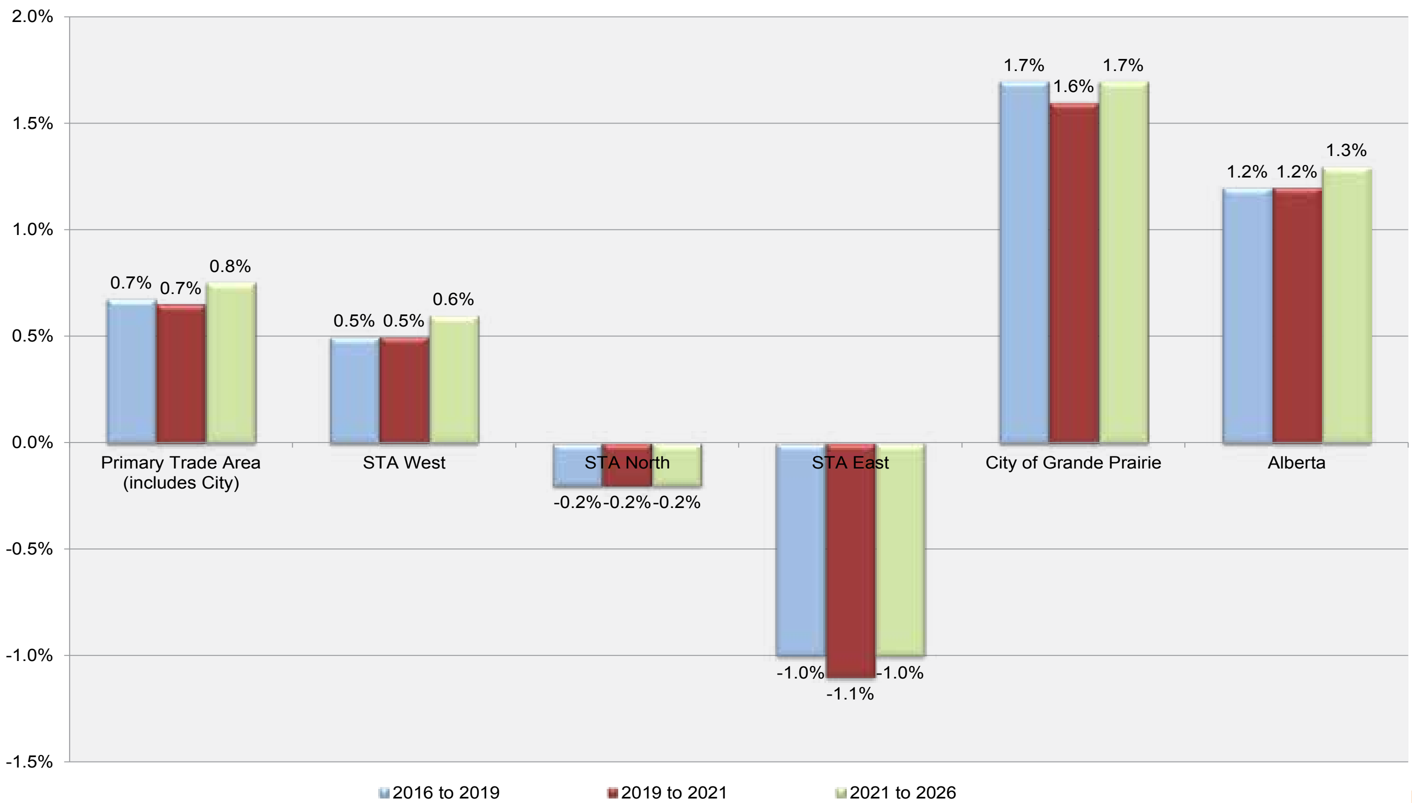
2016 Estimates and Projections Population Trends	Primary Trade Area (includes City)	STA West	STA North	STA East	Total Trade Area	City of Grande Prairie	Alberta
Total Population							
2011 Census*	152,673	56,987	24,420	30,054	264,134	57,233	3,790,185
2016 estimated **	167,461	59,053	25,203	29,708	281,425	68,556	4,191,020
2019 projected	170,886	59,986	25,029	28,784	284,685	72,112	4,346,671
2021 projected	173,121	60,613	24,911	28,169	286,814	74,438	4,450,158
2026 projected	179,768	62,321	24,672	26,722	293,483	80,984	4,743,508
Change in Population (persons)							
2011 to 2016	14,788	2,067	782	-347	17,291	11,323	400,835
2016 to 2019	3,425	933	-174	-923	3,260	3,556	155,651
2019 to 2021	2,235	627	-118	-615	2,129	2,326	103,487
2021 to 2026	6,647	1,708	-239	-1,447	6,669	6,546	293,350
Change in Population (percent)							
2011 to 2016	9.7%	3.6%	3.2%	-1.2%	6.5%	19.8%	10.6%
2016 to 2019	2.0%	1.6%	-0.7%	-3.1%	1.2%	5.2%	3.7%
2019 to 2021	1.3%	1.0%	-0.5%	-2.1%	0.7%	3.2%	2.4%
2021 to 2026	3.8%	2.8%	-1.0%	-5.1%	2.3%	8.8%	6.6%
Rate of Change in Population (percent per year)							
2011 to 2016	1.9%	0.7%	0.6%	-0.2%	1.3%	2.7%	2.1%
2016 to 2019	0.7%	0.5%	-0.2%	-1.0%	0.4%	1.7%	1.2%
2019 to 2021	0.7%	0.5%	-0.2%	-1.1%	0.4%	1.6%	1.2%
2021 to 2026	0.8%	0.6%	-0.2%	-1.0%	0.5%	1.7%	1.3%

** Population counts have been adjusted by MapInfo for census undercounts.*
*** Population for Cityof Grande Prairie reflects 2015 Census and is used as a baseline for 2016*

Figure 3.2

RETAIL TRADE AREA POPULATION GROWTH RATES

(Source: City of Grande Prairie, Pitney Bowes 2016 and Cushing Terrell Architecture Inc.)



3

281,000

TOTAL TRADE AREA POPULATION

3.2
POPULATION PROJECTIONS

Using data sources that include the City of Grande Prairie, which completed a Municipal Census in 2015, as well as Statistics Canada and Pitney Bowes, population estimates and growth forecasts were tabulated for each of the identified Trade Areas and benchmarked against the Alberta average.

While using the City's most recent Municipal Census for sensitizing base year estimates, for the purposes of this study Cushing Terrell used the 2016 Pitney Bowes Demographic data wherever possible. Using this data allows for better tabulation of the data at the block level for more accurate delineations and forecasts. While having the most current data projections, it also allows for comparisons across other municipalities and at the Provincial level.

Table 3.1 provides a breakdown of the Trade Area population in which the Primary Trade Area is shown to include and exclude the City of Grande Prairie.

The purpose of this inclusion/exclusion was to allow for the City of Grande Prairie to be isolated as its own demographic subset, thereby allowing for a more refined analysis of the demographics and spending patterns of the City's residents.

Referring to **Table 3.1**, the Total Trade Area population is estimated at over 281,000 as of January 2016.

Within the Total Trade Area, the Total Primary Trade Area, which includes the City of Grande Prairie, is estimated to be over 167,000 (59% of Total Trade Area) and is forecast to grow by over 12,000 by 2026.

Thus, it can be seen that the Trade Area's future population growth (**Figure 3.2**) will be driven by the Primary Trade Area, and most of that will be in the City of Grande Prairie or nearby Clairmont in the County of Grande Prairie.

The City of Grande Prairie, on its own has a 2016 population estimated at approximately 69,000.

Figure 3.3

TRADE AREA POPULATION AGE BREAKDOWN

(Source: City of Grande Prairie, Pitney Bowes 2016 and Cushing Terrell Architecture Inc.)

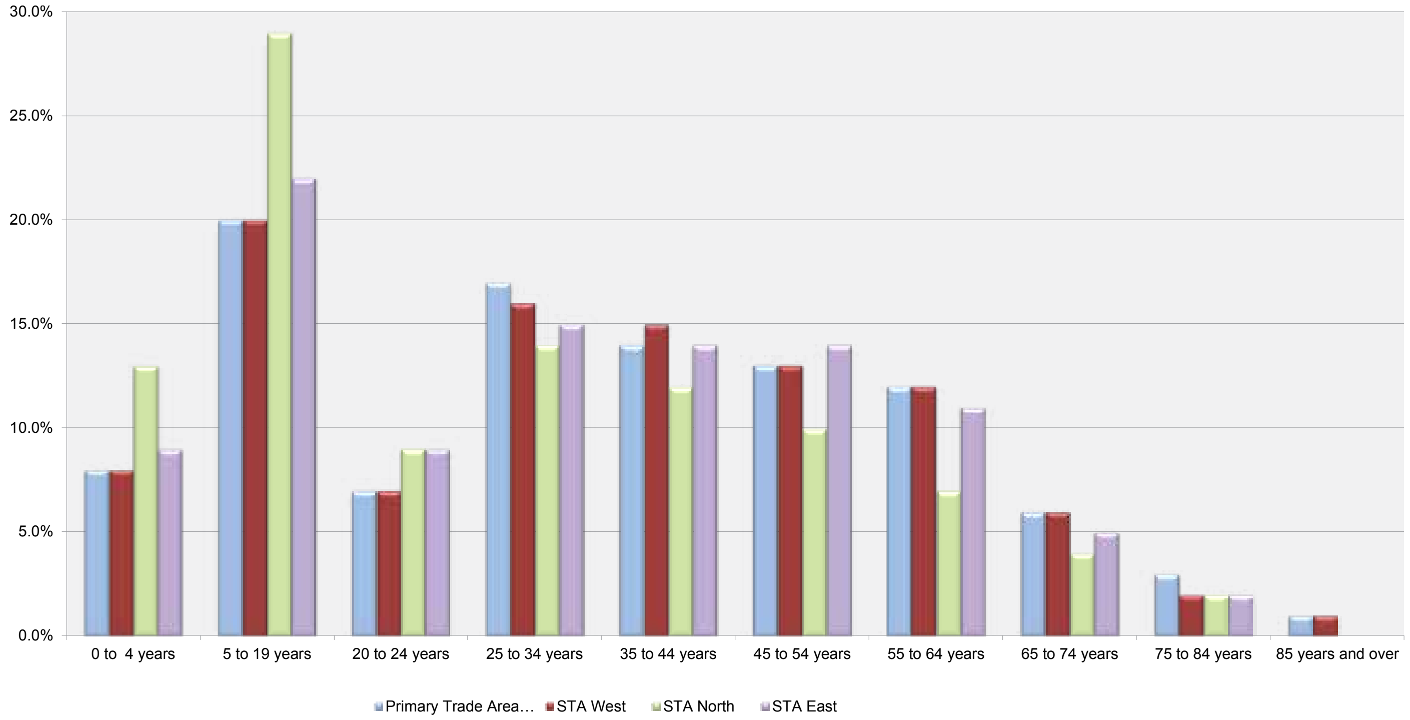


Table 3.2

TRADE AREA POPULATION AGE BREAKDOWN

(Source: City of Grande Prairie, Pitney Bowes 2016 and Cushing Terrell Architecture Inc.)

2016 Demographic Snapshot	Primary Trade Area (includes City)	STA West	STA North	STA East	Total Trade Area	City of Grande Prairie	Alberta
2016 Population by Age	**167,461**	**59,053**	**25,203**	**29,708**	**281,425**	**68,556**	**4,191,020**
0 to 4 years	13,397	4,431	3,292	2,667	22,514	5,484	274,344
5 to 19 years	33,492	11,893	7,386	6,556	59,099	12,340	729,966
20 to 24 years	11,722	4,302	2,256	2,561	22,514	6,170	280,706
25 to 34 years	28,468	9,712	3,515	4,329	45,028	15,082	694,876
35 to 44 years	23,445	8,633	3,045	4,235	39,400	10,283	628,554
45 to 54 years	21,770	7,741	2,425	4,106	36,585	7,541	566,823
55 to 64 years	20,095	7,154	1,705	3,126	30,957	6,170	514,218
65 to 74 years	10,048	3,446	994	1,446	16,886	2,742	292,700
75 to 84 years	5,024	1,347	467	540	8,443	1,371	144,332
85 years and over	1,675	394	116	142	2,814	686	64,501
Median Age	34.4	34.2	24.3	32.3	33.3	31.3	36.7

3

31.3

MEDIAN AGE IN CITY OF GRANDE PRAIRIE

(36.7 ALBERTA MEDIAN)

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

Forecasts provided by Pitney Bowes suggest that the City's population could reach an estimated 81,000 by 2026, at a slightly decelerated, yet robust average annual rate of 1.7%.

Figure 3.2 illustrates the strong and dominant growth forecasts for the City of Grande Prairie compared to the other retail Trade Areas, as well as compared to the Provincial forecasts.

Continued growth in the City of Grande Prairie, which represents the nucleus of the PTA, suggests that support for new retail shops and services will still be in demand over the next 5 years, though perhaps less aggressively than the past 5 year cycle.

Regional Trade Area dynamics for Grande Prairie are expected to continue in conjunction with more rooftops and more residents closer to the epicentre of demand. This trend means that retailers will be in a good position to tap into more frequent customers, which has the added benefit of providing more stable revenue growth.

3.3 AGE PROFILE

A summary of the current age profile, as documented in **Table 3.2 & Figure 3.3** reveals a growing younger age demographic comprised of families and young adults entering their higher income earning years, with a median age of 31.3 years in the City of Grande Prairie and 33.3 in the Total Trade Area.

Compared to the Provincial average of 36.7, Grande Prairie's youthful profile suggests a requisite mix of retail shops and services that matches the market profile, as further supported by the Consumer Intercept Survey Findings (**Section 6.0**).

Table 3.3

TRADE AREA AVERAGE HOUSEHOLD INCOME BREAKDOWN

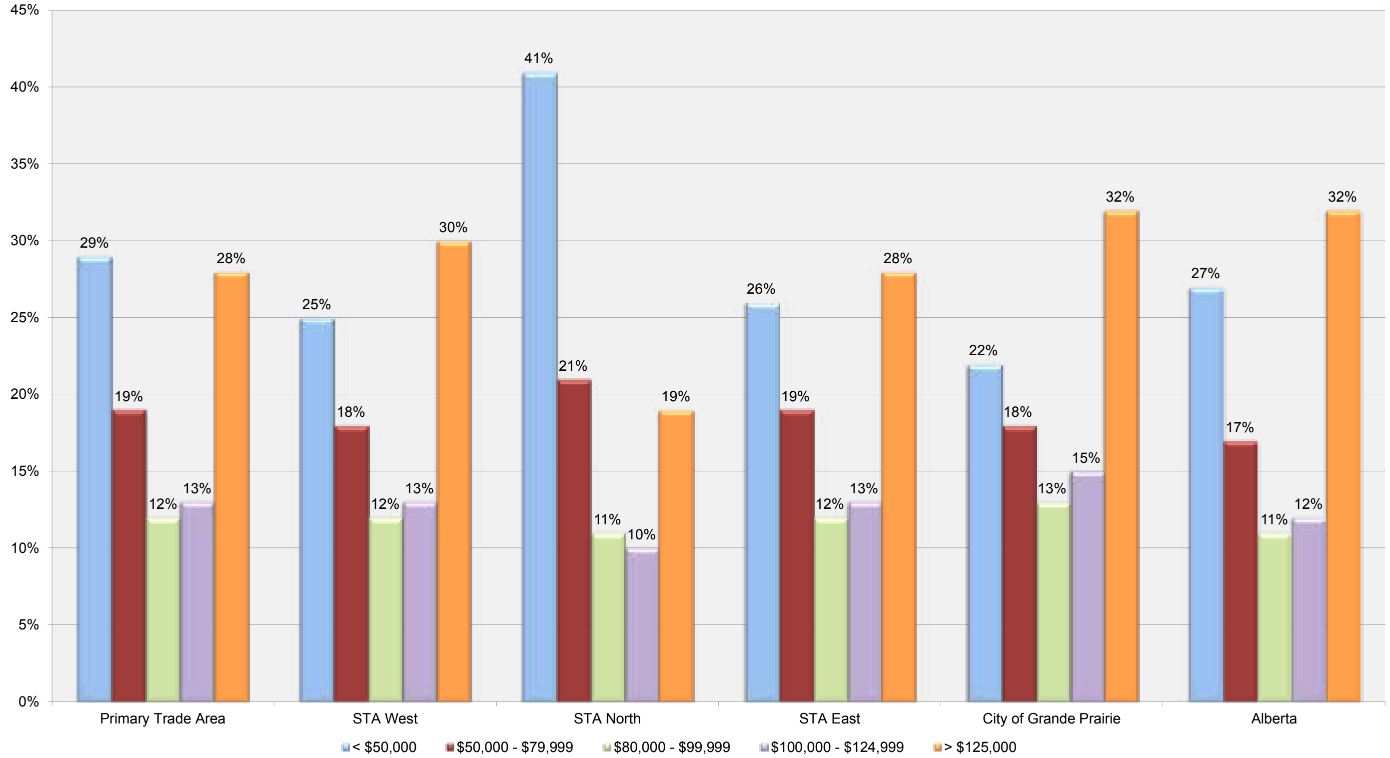
(Source: City of Grande Prairie, Pitney Bowes 2016 and Cushing Terrell Architecture Inc.)

2016 Estimates and Projections Income Trends	Primary Trade Area	STA West	STA North	STA East	Total Trade Area	City of Grande Prairie	Alberta
Average household income							
2016 estimated	$ 106,095	$ 110,266	$ 85,393	$ 111,235	$ 105,872	$ 113,671	$ 119,320
2019 projected	$ 114,484	$ 118,949	$ 90,321	$ 117,590	$ 113,912	$ 122,413	$ 129,425
2021 projected	$ 120,094	$ 124,722	$ 93,561	$ 121,796	$ 119,290	$ 128,233	$ 136,256
Change in average household income							
2016 to 2019	$ 8,388	$ 8,682	$ 4,928	$ 6,355	$ 8,040	$ 8,742	$ 10,104
2019 to 2021	$ 5,610	$ 5,773	$ 3,240	$ 4,207	$ 5,378	$ 5,820	$ 6,831

Figure 3.4

TRADE AREA AVERAGE HOUSEHOLD INCOME BREAKDOWN

(Source: City of Grande Prairie, Pitney Bowes 2016 and Cushing Terrell Architecture Inc.)



3 32%

PERCENTAGE OF CITY'S HOUSEHOLDS EARNING OVER $125,000 PER YEAR (32% ALBERTA AVERAGE)

Table 3.2 reveals that 31% of the Primary Trade Area's population is currently between the ages of 25 to 44 years. This age cohort represents not only the family building stage, but also the higher income earning stage. A strong and young family demographic profile is a critical prerequisite for many retailers looking at entering a market or establishing another location in an existing market.

Accordingly, with almost 52,000 of the Primary Trade Area population in the 25 to 44 year old age bracket, retail spending on discretionary items such as Automobiles and Recreational Vehicles/Motorsports, Fashion, House & Home, Food & Beverage (away from home), Sporting Goods and Entertainment & Leisure is expected to be quite strong.

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

A citywide retail study of this nature must realize the role that all retail formats play in the establishment and evolution of a complete community. Some retail nodes will not compete with the above noted larger comparison retail nodes, but rather a blend of local and branded shops and services could be very well positioned within closer proximity to peoples' primary residences and areas of employment, such as Downtown or projects such as South 40, Cobblestone Lane, Grande Banks, Stone Ridge etc.

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

In a market such as Grande Prairie, which has climate extremes, the role of the Prairie Mall is very critical and as it relates to the age profile: it needs to ensure that it has the ability to adapt and provide the requisite spaces for tenants that will see value in the market and its trade area, but will also have a locational requirement that will only see them looking at enclosed shopping centre formats, of which Prairie Mall is the only viable, high traffic location.

3.4 INCOME PROFILE

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

A summary of the current average Household Income in the Retail Trade Area, as documented in **Table 3.3 and Figure 3.4** reveals an average Household Income in 2016 estimated at over $113,000 in the City of Grande Prairie, which is slightly below the Provincial average ($119,000). The overall Trade Area average household income is estimated at just under $106,000.

It is worth stating however, that in many cases, the household incomes as reported in the Statistics Canada Census tend to understate the reality of the market, which in the case of Grande Prairie may be higher than that documented in **Table 3.3**.

Table 3.4

TRADE AREA RETAIL SPENDING

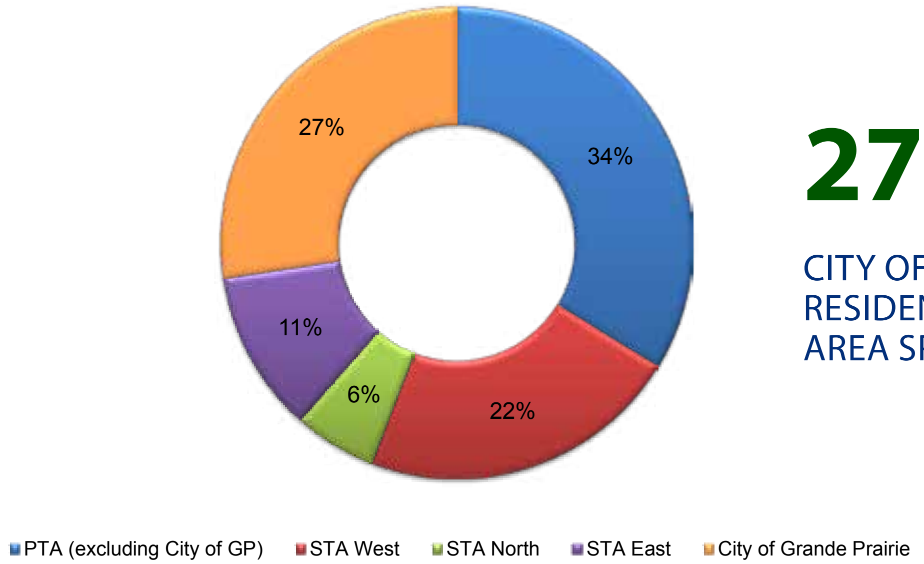
(Source: Pitney Bowes CANEx 2016 and Cushing Terrell Architecture Inc.)

	2016 (as of January 1st)						
Retail Spending by Merchandise Category	Primary Trade Area Aggregate Retail Spending	PTA Including Grande Prairie Aggregate Retail Spending	STA West Aggregate Retail Spending	STA North Trade Area Aggregate Retail Spending	STA East Aggregate Retail Spending	City of Grande Prairie Aggregate Retail Spending	TOTAL Trade Area Aggregate Retail Spending
Grocery & Specialty Foods	$223,047,760	$475,928,477	$178,446,063	$47,711,300	$107,290,454	$252,880,717	$809,376,294
Pharmacy	$36,835,207	$55,906,551	$22,167,633	$6,593,340	$10,413,672	$19,071,344	$95,081,196
Alcohol & Tobacco	$43,324,994	$66,925,782	$28,008,342	$6,739,395	$13,800,232	$23,600,788	$115,473,751
Personal Services	$60,526,325	$105,238,030	$36,803,232	$8,568,560	$17,313,788	$44,711,705	$167,923,610
Clothing & Apparel	$84,736,838	$153,817,482	$55,001,889	$13,541,385	$25,706,107	$69,080,644	$248,066,863
Footwear	$21,308,866	$37,625,460	$13,846,314	$3,526,185	$6,497,962	$16,316,594	$61,495,921
Jewelry & Accessories	$13,290,328	$28,203,059	$9,020,400	$2,044,770	$4,307,281	$14,912,731	$43,575,510
Health & Beauty	$24,980,092	$44,130,899	$16,394,577	$3,999,125	$7,715,007	$19,150,807	$72,239,608
Home Furnishings & Accessories	$70,705,479	$137,163,814	$43,049,859	$10,662,015	$19,874,874	$66,458,335	$210,750,562
Home Electronics & Appliances	$138,063,556	$241,499,107	$90,294,204	$21,671,780	$42,490,745	$103,435,551	$395,955,836
Home Improvement & Gardening	$52,840,231	$83,433,845	$22,054,878	$8,679,840	$13,906,062	$30,593,614	$128,074,625
Books & Multimedia	$25,950,483	$47,299,793	$16,732,842	$3,741,790	$8,095,995	$21,349,310	$75,870,420
Sporting Goods & Recreation	$14,462,427	$27,415,048	$9,990,093	$2,288,195	$4,751,767	$12,952,621	$44,445,103
Toys & Hobbies	$6,882,791	$12,312,826	$4,419,996	$1,008,475	$2,116,600	$5,430,035	$19,857,897
Miscellaneous Specialty	$42,747,612	$63,143,354	$21,648,960	$5,863,065	$10,191,429	$20,395,742	$100,846,808
Full-Service F&B	$70,889,591	$128,941,171	$47,236,678	$10,998,498	$22,317,219	$58,051,580	$209,493,565
Limited Service F&B	$30,422,730	$55,331,494	$20,145,710	$4,559,837	$9,516,445	$24,908,764	$89,553,487
Entertainment & Leisure	$47,164,114	$89,862,733	$32,383,236	$7,233,200	$14,890,281	$42,698,619	$144,369,450
Auto Parts & Accessories	$21,739,974	$33,129,804	$13,305,090	$3,804,385	$6,085,225	$11,389,830	$56,324,504
Auto/RV/Motorsports Dealership	$220,649,289	$377,087,282	$137,493,447	$37,146,655	$63,910,737	$156,437,993	$615,638,121
TOTAL RETAIL CATEGORIES ONLY	**$1,250,568,687**	**$2,264,396,010**	**$818,443,443**	**$210,381,795**	**$411,191,882**	**$1,013,827,323**	**$3,704,413,130**

Figure 3.5

TRADE AREA RETAIL SPENDING SUMMARY

(Source: Pitney Bowes CANEx 2016 and Cushing Terrell Architecture Inc.)



27%

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

3 $3.7 Billion

TOTAL TRADE AREA RETAIL SPENDING IN 2016

Table 3.3 also reveals that Household Income in the City of Grande Prairie is forecast to grow at an average annual rate of 2.4% per annum over the next 5 years, which is marginally less than the Provincial rate of 2.7% per annum. This growth though is subject to an improving Provincial economy.

Figure 3.4 shows a valuable trend whereby 32% of the households earn over $125,000, which mirrors the Provincial average.

With average household sizes in the Trade Area ranging from 2.6 to 2.7, the income profile illustrates a market that is well positioned to benefit from strong levels of discretionary spending on retail shops and services.

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

3.5
RETAIL SPENDING PROFILE

Building upon the Trade Area demographic profile analysis, an assessment was made of the Trade Area's retail spending profile. This provides a more refined understanding of the opportunity for retailing within the City of Grande Prairie. The key questions it seeks to answer are:

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

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

Figure 3.6

TRADE AREA RETAIL SPENDING SUMMARY 2016

(Source: Pitney Bowes CANEx 2016 and Cushing Terrell Architecture Inc.)

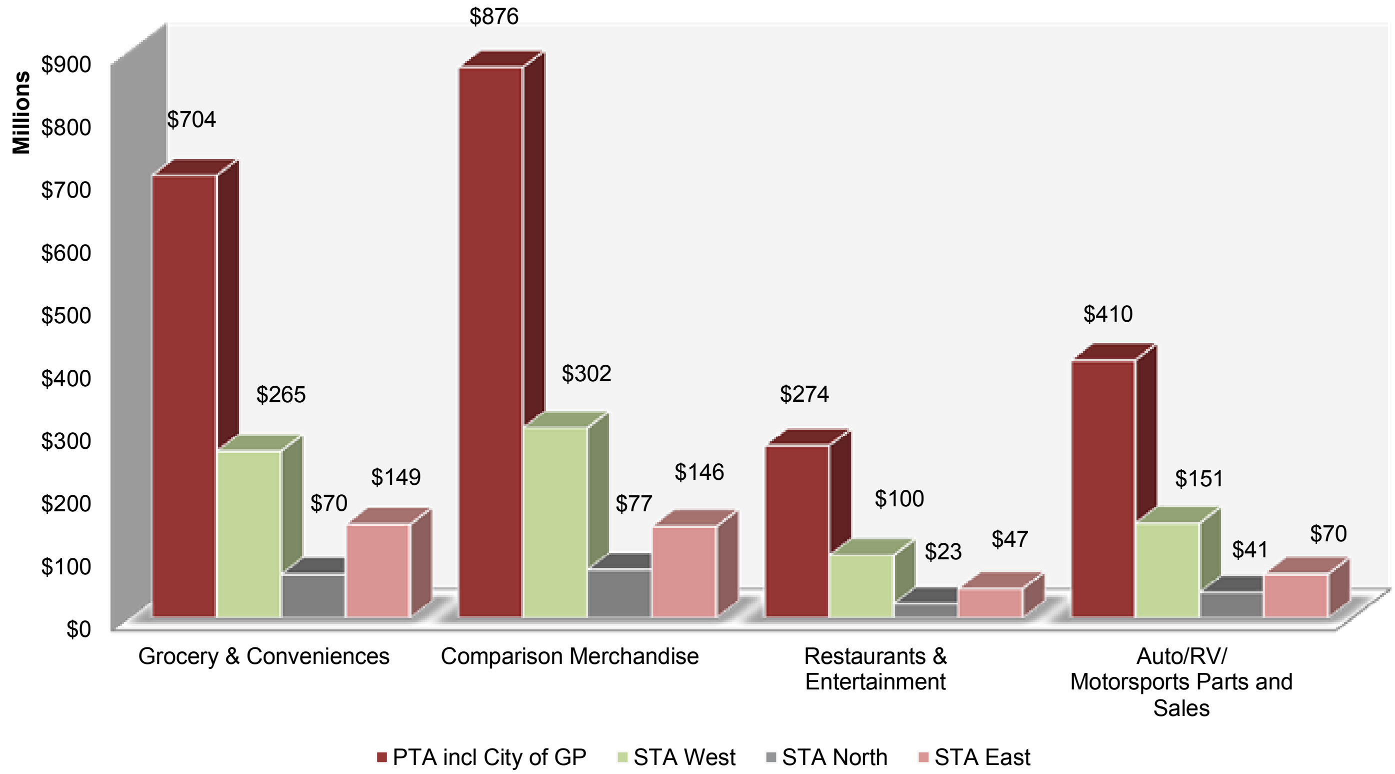
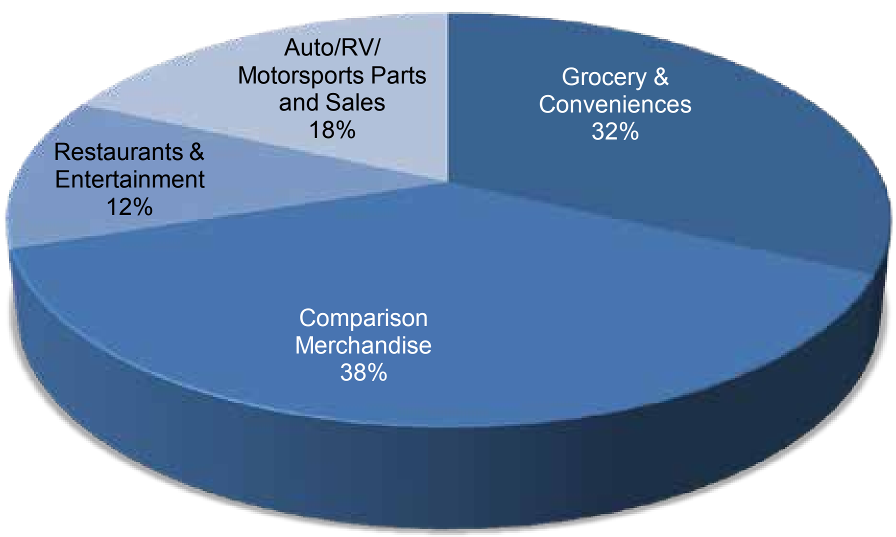


Figure 3.7

TRADE AREA RETAIL SPENDING BY GENERAL CATEGORY

(Source: Pitney Bowes CANEx 2016 and Cushing Terrell Architecture Inc.)



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Detailed information on retail spending within the Trade Area was collected from Pitney Bowes CANEx (Household Expenditure) data which was collected at a detailed micro-geographic scale for census dissemination areas. This data was then aggregated to each respective Trade Area in order to build a spending profile, that is in turn specific to each respective Trade Area.

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

The initial task involved developing an understanding of how each of the delineated Trade Area residents spend their shopping and leisure dollars at a household and per capita level for each of 20 merchandise categories. Once this Trade Area shopping "profile" was established, the data was aggregated by population to quantify the size of the Trade Area retail market.

The result is a Total Trade Area for the City of Grande Prairie estimated at $3.7 Billion in retail spending for 2016 (refer to **Table 3.4)**.

What is most compelling about the Trade Area spending (**Figure 3.5**) is that the City of Grande Prairie's residents only account for 27% of that total spending catchment. This suggests a significant market potential within a 2-hour drive time which retailers could tap into.

The combined spending of the Primary Trade Area, which includes the City of Grande Prairie and extends into Dawson Creek in British Columbia, shown in **Figure 3.6,** further supports and illustrates just how strong a catchment Grande Prairie's PTA represents.

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

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

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

1. *Grocery & Specialty Foods - $809 Million*
2. *Auto/RV/Motorsport - $615 Million*
3. *Home Electronics & Appliances - $396 Million*
4. *Clothing, Apparel & Footwear - $310 Million*
5. *Home Furnishings - $210 Million*
6. *Full-Service Restaurants - $209 Million*

Because Grande Prairie is located far enough from its nearest major metropolitan area (Edmonton is a 4 to 5 hour drive), with strong spending attributes and a large trade area catchment, retailers could expect excellent support from customers, as has been the case for retailers such as Costco, for whom the market was a question, prior to their arrival.

10 Barrel Brewing Co. - Boise, Idaho | designed by Cushing Terrell

3

3.6
SUMMARY & IMPLICATIONS

The Trade Area Demographic Profile illustrates a burgeoning resident and consumer market within a 2-hour drive time comprised of households with high income earnings and a young family dynamic: an average age of 31.3 years, which is almost 5 years younger than the Provincial average.

The Total Trade Area penetrates well in excess of 281,000 residents within which the Primary Trade Area alone comprises over 167,000 residents.

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

Moreover, Grande Prairie's regional centrality relative to Northeastern BC and Northwestern Alberta provides the ideal location for potential retailers to locate.

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

Retail spending by City of Grande Prairie residents alone is now just over $1 Billion, while the Total Trade Area within a 2 hour drive time is estimated at almost $3.7 Billion. Most significantly however is the fact that the City of Grande Prairie is the shopping and service centrality for this large spending catchment.

Although provincial and regional economies are not what they have been over the past 5 years, the City of Grande Prairie's economic diversity has enabled its resident base to maintain a strong economic profile in terms of spending capacity, which continues to bode well for retail opportunities in the City.

Westgate Centre, Grande Prairie. Photo: Kieron Hunt

4 RETAIL MARKET SUPPLY

4.1
INTRODUCTION

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

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

To further assess the level of retail supply, a comprehensive inventory and evaluation was conducted with respect to locations, format and amount of space. This evaluation creates a foundation upon which retail "gaps" may be quantified and determined.

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

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

4.2
GRANDE PRAIRIE RETAIL VACANCY

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

Data was obtained through Cushing Terrell Architecture's on-site fieldwork conducted in late 2013/early 2014 and again in early 2016.

As of the end of February 2016, the city's overall retail vacancy rate was estimated at 6.5%. This includes notable vacancies such as the former Target space at Prairie Mall and Future Shop on the city's west side. When excluding these 2 major boxes from the overall total, the vacancy drops by almost half to 3.2%.

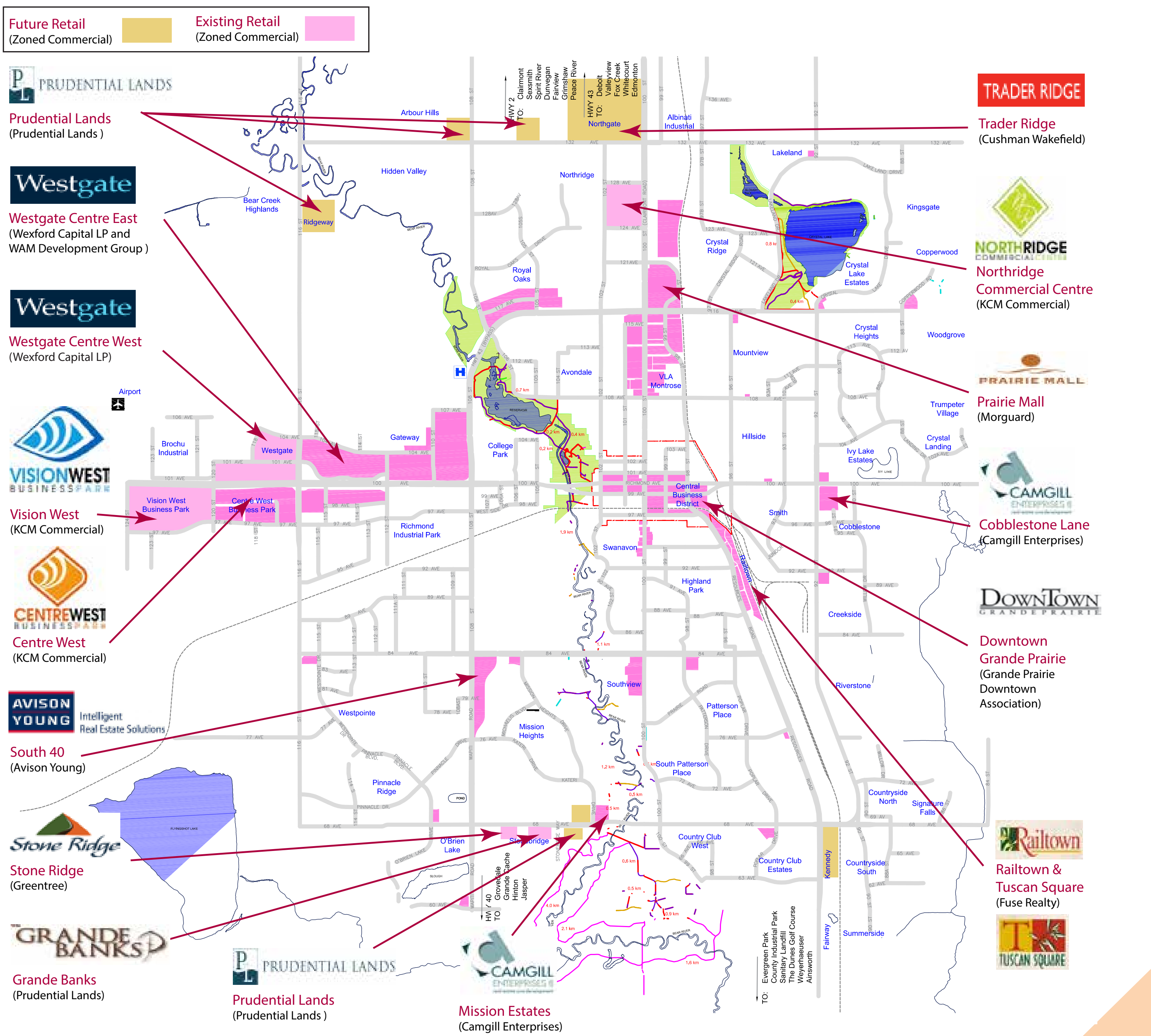
Within the remainder of the overall vacancies, most are attributable to older sub-standard retail space or new retail space waiting to be leased. For example, the South 40 development continues to move towards buildout, with approximately 10,150 sf of new space finished and awaiting tenants, while new space awaiting tenants at the new Westgate Centre accounts for 11,390 sf. At the other end of the spectrum is the former Peavey Mart building which remains vacant, but is in an area that may well not be considered viable for retail, thus making this 16,000 sf of vacant space possibly non-retail in its future use.

The overall story of vacancy therefore illustrates that when factoring newly built and actively leased but vacant space, the city's retail vacancy is low, suggesting a relatively healthy and balanced retail market.

Figure 4.1

CITY OF GRANDE PRAIRIE RETAIL PROJECTS INVENTORY & SUPPLY MAP

(Source: City of Grande Prairie, Cushing Terrell Architecture Inc)



4

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

4.3
RETAIL DEVELOPMENTS

Figure 4.1 documents and highlights the major retail nodes and future projects in the City of Grande Prairie. This diagrammatic profile also includes areas of future development as "zoned commercial".

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

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

Table 4.1
CITY OF GRANDE PRAIRIE RETAIL INVENTORY
(Source: City of Grande Prairie and Cushing Terrell Architecture Inc.)

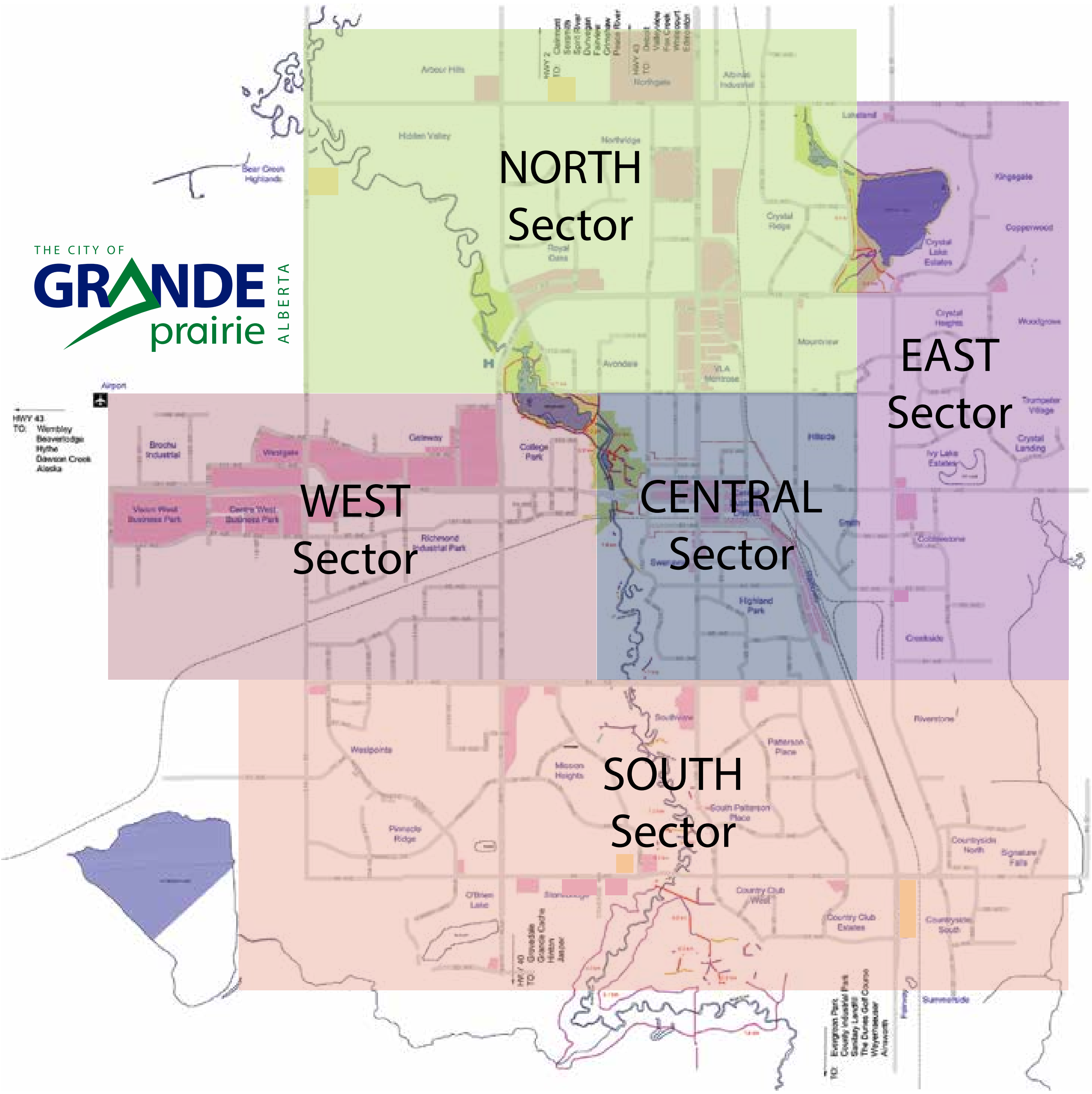
Merchandise Category	Existing Inventory (SF)	Existing Inventory (%)	Number of Stores	% of Number of Stores	Average Store Size
Grocery & Specialty Foods	551,700	13.59%	47	5.5%	11,738
Alcohol & Tobacco	99,550	2.45%	36	4.2%	2,765
Pharmacy	75,657	1.86%	12	1.4%	6,305
Personal Services	242,879	5.98%	115	13.5%	2,112
Clothing & Apparel	420,616	10.36%	66	7.7%	6,373
Footwear	31,103	0.77%	16	1.9%	1,944
Jewelry & Accessories	35,021	0.86%	24	2.8%	1,459
Health & Beauty	69,529	1.71%	48	5.6%	1,449
Home Electronics & Appliances	118,874	2.93%	21	2.5%	5,661
Home Furnishings & Accessories	301,046	7.41%	40	4.7%	7,526
Home Improvement & Gardening	288,300	7.10%	24	2.8%	12,013
Books & Multi-Media	17,504	0.43%	10	1.2%	1,750
Sporting Goods & Outdoor Recreation	137,257	3.38%	15	1.8%	9,150
Toys & Hobbies	31,307	0.77%	11	1.3%	2,846
Specialty Retail	253,337	6.24%	84	9.8%	3,016
Full Service F&B	189,090	4.66%	46	5.4%	4,111
Limited Service F&B	187,836	4.63%	122	14.3%	1,540
Entertainment & Leisure	217,000	5.34%	19	2.2%	11,421
Auto Parts & Accessories	165,900	4.09%	16	1.9%	10,369
Auto/RV/Motorsports Dealership	361,150	8.89%	26	3.0%	13,890
VACANT	265,991	6.55%	55	6.4%	4,836
TOTAL	**4,060,645**	**100.00%**	**853**	**100%**	**4,760**

Figure 4.2

RETAIL SECTORS

(Source: Cushing Terrell Architecture Inc.)

Identified Retail Node	Total Inventory (sf)
NORTH	1,623,048
SOUTH	347,980
CENTRAL	454,000
EAST	75,300
WEST	1,560,317
TOTAL	**4,060,645**



4 4.06 m sf

CITY OF GRANDE PRAIRIE'S RETAIL INVENTORY (as of Feb 2016)

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

4.4
CITYWIDE RETAIL INVENTORY

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

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

Since 2012, over 500,000 sf of new space has entered the market. The majority of this new retail has taken place at the Westgate Centre and South 40, both of which continue to add space into 2016.

As documented in **Tables 4.1 and 4.2**, the City of Grande Prairie has an estimated retail floorspace of approximately 4.06 million sf. This retail floorspace is comprised of approximately +/- 775 retail premises that range from Auto Dealerships to Restaurants and Personal Services such as Florists or Salons.

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

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

The local market has reached a threshold whereby a number of other regional or national chains could have sufficient market support to warrant a location and in some cases second or multiple locations depending on the type of retailer. However, there is currently a deficiency in the quality of retail space and configurations suitable for new market entries.

4.5
RETAIL INVENTORY BY SECTOR

Based on the fieldwork and inventory, Grande Prairie's Retail environment was allocated into 5 Sectors (refer to **Figure 4.2**). Each Sector was determined based on geographic and spatial factors such as road networks, patterns of residential development, types of inventory. The result were the following Sectors totaling 4.06 million sf:

- North Sector 1.62 million sf
- West Sector 1.56 million sf
- Central Sector 454,000 sf
- South Sector 348,000 sf
- East Sector 75,000 sf

Figure 4.3
REPRESENTATIVE CITY RETAIL IMAGERY
Source: Photos by Cushing Terrell Architecture Inc.

4

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

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

It is worth noting however, that because a specific Sector may not have any retail space, this does not suggest that there is a void, but rather could be simply a reflection of the area being more local in its trade area. This is particularly the case for the East Sector, which provides the basic day-to-day needs for its local trade area residents.

Conversely, the North Sector has a wide array of all types of shops and services, though its largest share of retail category is Clothing & Apparel and Footwear: 256,000 sf or 16% of the total North Sector floorspace.

This is expected since the Prairie Mall is located in the North Sector and is the dominant Fashion format in the City, although Westgate has gained prominence since it opened in 2013.

Table 4.2

RETAIL INVENTORY BY CATEGORY & SECTOR

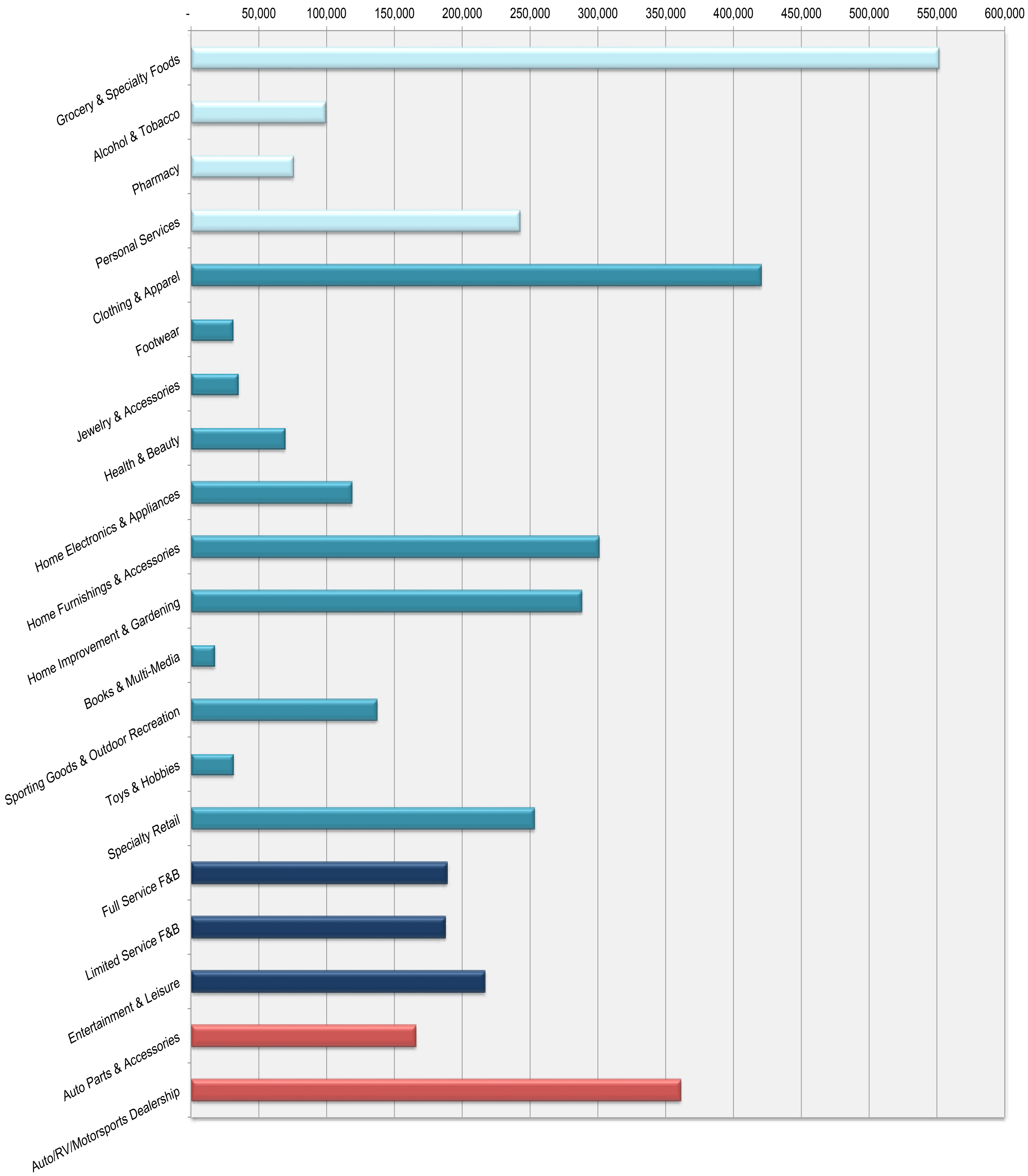
(Source: City of Grande Prairie, Cushing Terrell Architecture Inc.)

Merchandise Category	IDENTIFIED RETAIL NODE (sf)					TOTAL (sf)
	NORTH	SOUTH	CENTRAL	EAST	WEST	
Grocery & Specialty Foods	174,500	127,050	55,600	12,050	182,500	**551,700**
Alcohol & Tobacco	33,250	26,750	5,300	11,250	23,000	**99,550**
Pharmacy	19,844	26,250	1,000	15,000	13,563	**75,657**
Personal Services	66,708	27,708	75,300	9,250	63,913	**242,879**
Clothing & Apparel	242,308	1,000	24,250	0	153,058	**420,616**
Footwear	13,803	0	4,000	0	13,300	**31,103**
Jewelry & Accessories	22,458	0	4,250	0	8,313	**35,021**
Health & Beauty	27,429	3,750	21,750	2,000	14,600	**69,529**
Home Electronics & Appliances	29,774	0	19,050	0	70,050	**118,874**
Home Furnishings & Accessories	134,996	0	49,050	0	117,000	**301,046**
Home Improvement & Gardening	77,500	0	1,000	0	209,800	**288,300**
Books & Multi-Media	10,879	0	3,000	0	3,625	**17,504**
Sporting Goods & Outdoor Recreation	81,307	1,500	0	0	54,450	**137,257**
Toys & Hobbies	15,250	0	4,000	0	12,057	**31,307**
Specialty Retail	73,574	4,250	55,200	1,000	119,313	**253,337**
Full Service F&B	61,431	13,000	51,000	3,000	60,659	**189,090**
Limited Service F&B	39,640	45,358	26,350	14,000	62,488	**187,836**
Entertainment & Leisure	19,000	24,500	23,500	5,000	145,000	**217,000**
Auto Parts & Accessories	116,700	0	0	0	49,200	**165,900**
Auto/RV/Motorsports Dealership	235,700	0	2,350	0	123,100	**361,150**
VACANT	126,997	46,864	28,050	2,750	61,330	**265,991**
TOTAL	**1,623,048**	**347,980**	**454,000**	**75,300**	**1,560,317**	**4,060,645**

Figure 4.4

CITY OF GRANDE PRAIRIE RETAIL INVENTORY FLOORSPACE BY CATEGORY

(Source: Cushing Terrell Architecture Inc. 2016)



4 452,000 sf

AMOUNT OF CLOTHING & APPAREL AND FOOTWEAR FLOORSPACE IN CITY

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

The current vacancy in the South Sector is misleading since the majority of this vacant space (12,000 sf) is space that is in the process of being completed in the South 40 development and is likely to be leased by the end of 2016, particularly now that almost all the buildings have been built.

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

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

4.6
RETAIL INVENTORY BY CATEGORY

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

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

1. *Grocery & Specialty Foods 552,000 sf*
2. *Clothing/Apparel & Footwear 452,000 sf*
3. *Auto/RV/Motorsports 361,000 sf*
4. *Home Furnishings 301,000 sf*
5. *Home Improvement 288,000 sf*

Newer developments/redevelopments such as those identified in **Figure 4.1** (e.g. Westgate, Vision West, South 40, Grande Banks/Stone Ridge) have the potential to create a better foundation for success for both local and branded tenants. Location will always be one of the most critical determinants, particularly for a comparison retailer for whom patronage is required from beyond a localized trade area.

Categories which show a low level of inventory include Toys & Hobbies (31,000 sf) and Books & Media (17,000 sf).

Together these three categories make up only 1.2% of Grande Prairie's total retail inventory. Each of these categories could be considered under-served yet conducive to Grande Prairie's market profile, when considering the demographics and typical store size formats.

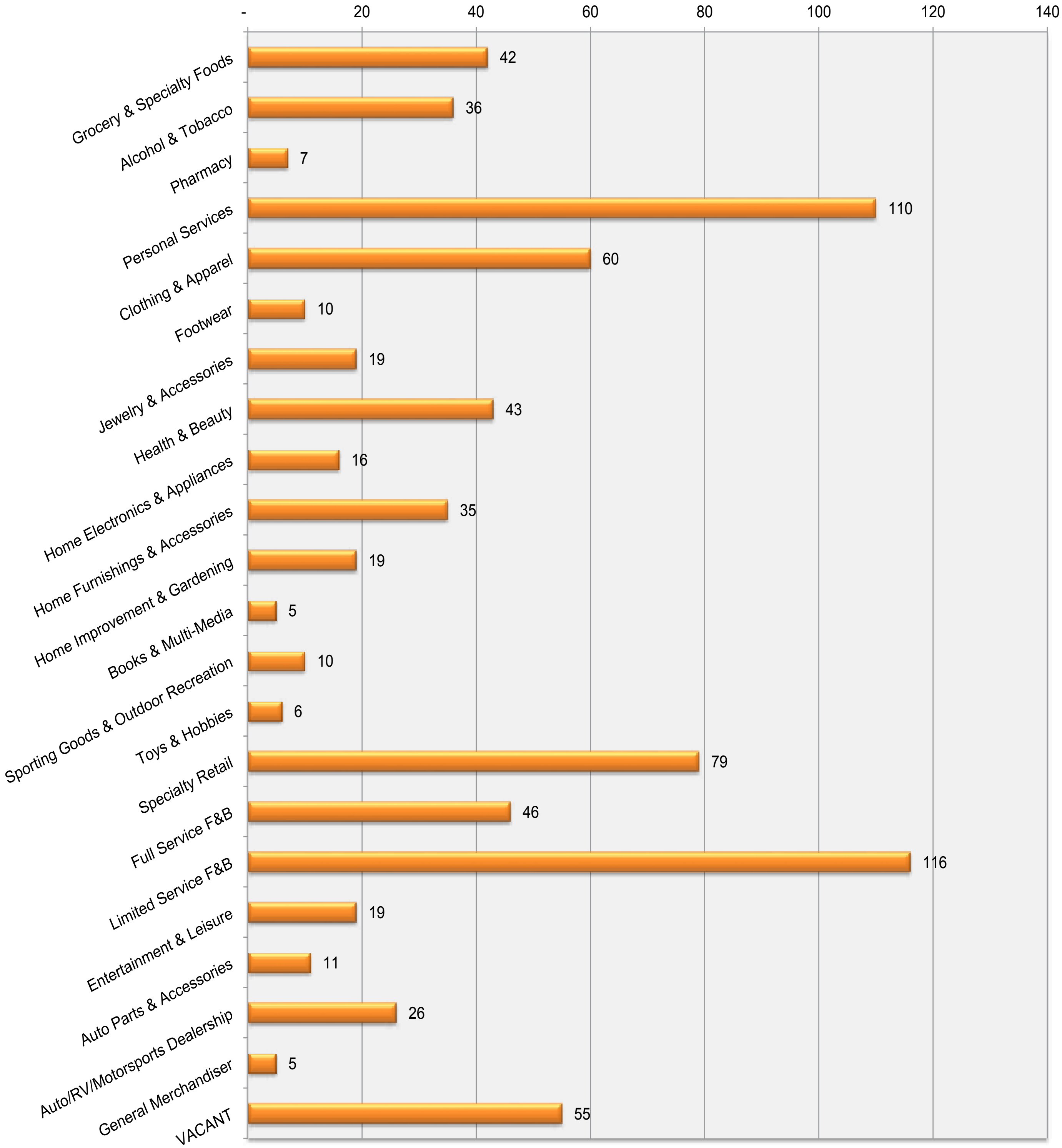
However, industry-wide the book industry continues to struggle in the face of on-line competition. Nonetheless, a store such as Indigo which is a slightly smaller footprint than a typical Chapters location could represent a strong addition to the city's retail inventory.

Figure 4.5

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

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

(Source: Cushing Terrell Architecture Inc. 2016)



4

+/-775

NUMBER OF RETAIL STORES IN CITY OF GRANDE PRAIRIE

4.6

RETAIL INVENTORY BY CLASS

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

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

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

The categorization of Class is based on a subjective evaluation criteria such as the age of the building (e.g. older than 5 yrs), locational attributes (e.g. parking, access, visibility) and whether the tenant is a chain store or local (refer to notation beside **Table 4.3**).

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

As displayed in **Figure 4.5**, the calibre of retail in Grande Prairie can best be classified as average in that the majority of retail spaces fall within the B Class quality (53%). C and A Class accounts for 21% and 26% respectively of total retail space.

With the number of new developments either under construction or proposed in the City, the amount of A Class space has increased. An increase in higher quality retail spaces located in high traffic and well patronized areas will create notable opportunities for exposing the Grande Prairie brand and opportunity to new-to-market retailers as well as those tenants wishing to relocate or add additional locations.

4.7

RETAIL SPACE PER CAPITA

Retail space per capita is an industry measure of the ratio of retail space against a city's population.

Table 4.3

RETAIL INVENTORY SUMMARY BY SECTOR & CLASS

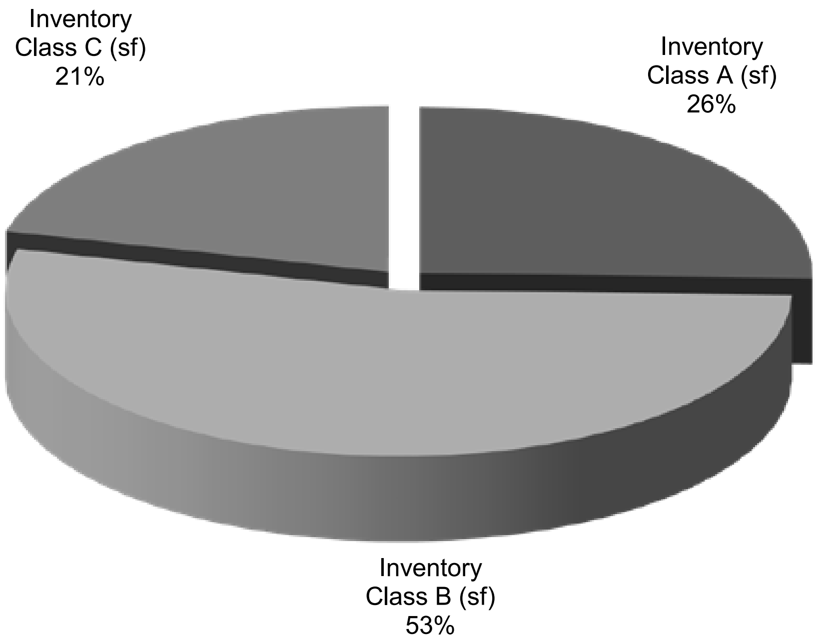
(Source: City of Grande Prairie, Cushing Terrell Architecture Inc.)

Identified Retail Node	Total Inventory (sf)	Inventory Class A (sf)	Inventory Class B (sf)	Inventory Class C (sf)
NORTH	1,623,048	316,070	749,598	430,383
SOUTH	347,980	48,250	237,866	15,000
CENTRAL	454,000	5,300	138,300	282,350
EAST	75,300	17,000	49,250	6,300
WEST	1,560,317	581,324	852,913	64,750
TOTAL	**4,060,645**	**967,944**	**2,027,927**	**798,783**

Figure 4.6

CITY OF GRANDE PRAIRIE RETAIL INVENTORY BY CLASS OF RETAIL SPACE

(Source: Cushing Terrell Architecture Inc. 2016)



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.*

4 59 sf

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

An examination of retail space per capita provides a general indication as to whether a market is under or over retailed.

In most urban markets in Canada and the United States, a typical benchmark for all retail space per capita (meaning not just organized shopping centres, but including streetfront retail or small strip centres) is in the range of 30 sf to 40 sf (Source: International Council of Shopping Center).

Most markets that fall within the 30 to 40 sf per capita range are typically self-serving markets, meaning they do not have a significant regional Trade Area, but rather fulfill the demand and needs of its own city's population base.

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

When applying the retail inventory for the City of Grande Prairie (4.06 million sf) against the City's population of 68,556 (2016 est), the resulting per capita ratio is 59. This figure in isolation may seem high, but given the remote location relative to the City of Edmonton, the figure further indicates regional catchment Grande Prairie services.

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

4.8 SUMMARY & IMPLICATIONS

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

The current city retail inventory, which is quantified and estimated on a category-by-category and sector-by-sector basis to be just over 4.0 million sf, would not in isolation be supported by the City of Grande Prairie residents alone.

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

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

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

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

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

Prairie Mall Grande Prairie. Photo: Morguard

5 RETAIL DEMAND & GAP ANALYSIS

5.1 INTRODUCTION

The following section will quantify the amount of supportable floorspace in the City of Grande Prairie as justified by the Trade Area which it serves. After determining the supportable and residual floorspace (if and as determined), the Retail Gap Analysis will measure the difference between the supply and demand as presented in terms of 'inflow' or 'outflow' of retail sales.

5.2 RETAIL FLOORSPACE DEMAND BY TRADE AREA SEGMENT

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

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

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

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

City of Grande Prairie Supply - Demand

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

Accordingly, **Table 5.1** reveals that the City's residents could justify approximately just over 2.14 million sf of retail space, at an overall market share of 79%.

Since this study is examining the City of Grande Prairie's retail market, the resulting market shares and demand are viewed as "retained" in that 79% of total City of Grande Prairie resident spending is retained in the City of Grande Prairie. The remaining 21% is likely spent elsewhere and most likely in the City of Edmonton on Destination and Entertainment retail or on-line.

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

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

TABLE 5.1

CITY OF GRANDE PRAIRIE RETAIL FLOORSPACE DEMAND

Retail Spending by Merchandise Category	2016			
	City of GP Retail Sales Productivity ($psf)	Retained Market Share	Retained Sales $	Floorspace Demand (sf)
Grocery & Specialty Foods	$550	97%	$245,294,296	445,990
Pharmacy	$550	97%	$18,499,203	33,635
Alcohol & Tobacco	$500	97%	$22,892,764	45,786
Personal Services	$200	90%	$40,240,535	201,203
Clothing & Apparel	$275	76%	$52,501,290	190,914
Footwear	$275	76%	$12,400,611	45,093
Jewelry & Accessories	$500	76%	$11,333,676	22,667
Health & Beauty	$450	76%	$14,554,614	32,344
Home Furnishings & Accessories	$275	38%	$25,254,167	91,833
Home Electronics & Appliances	$450	39%	$40,339,865	89,644
Home Improvement & Gardening	$225	90%	$27,534,252	122,374
Books & Multimedia	$200	46%	$9,820,682	49,103
Sporting Goods & Recreation	$250	58%	$7,512,520	30,050
Toys & Hobbies	$250	58%	$3,149,420	12,598
Miscellaneous Specialty	$250	50%	$10,197,871	40,791
Full-Service F&B	$450	84%	$48,763,328	108,363
Limited Service F&B	$550	91%	$22,666,975	41,213
Entertainment & Leisure	$175	81%	$34,585,881	197,634
Auto Parts & Accessories	$375	90%	$10,250,847	27,336
Auto/RV/Motorsports Dealership	$450	90%	$140,794,193	312,876
TOTAL RETAIL CATEGORIES ONLY	**$373**	**79%**	**$798,586,991**	**2,141,446**

TABLE 5.2

PTA (EXCLUDING GRANDE PRAIRIE) RETAIL FLOORSPACE DEMAND

Retail Spending by Merchandise Category	2016			
	PTA Retail Sales Productivity ($psf)	Inflow Market Share	Inflow Sales $	Floorspace Demand (sf)
Grocery & Specialty Foods	$550	50%	$111,523,880.00	202,771
Pharmacy	$550	50%	$18,417,604	33,487
Alcohol & Tobacco	$500	50%	$21,662,497	43,325
Personal Services	$200	50%	$30,263,163	151,316
Clothing & Apparel	$275	65%	$55,078,945	200,287
Footwear	$275	65%	$13,850,763	50,366
Jewelry & Accessories	$500	65%	$8,638,713	17,277
Health & Beauty	$450	65%	$16,237,060	36,082
Home Furnishings & Accessories	$275	65%	$45,958,561	167,122
Home Electronics & Appliances	$450	65%	$89,741,311	199,425
Home Improvement & Gardening	$225	50%	$26,420,116	117,423
Books & Multimedia	$200	50%	$12,975,242	64,876
Sporting Goods & Recreation	$250	65%	$9,400,578	37,602
Toys & Hobbies	$250	65%	$4,473,814	17,895
Miscellaneous Specialty	$250	65%	$27,785,948	111,144
Full-Service F&B	$450	65%	$46,078,234	102,396
Limited Service F&B	$550	50%	$15,211,365	27,657
Entertainment & Leisure	$175	75%	$35,373,086	202,132
Auto Parts & Accessories	$375	50%	$10,869,987	28,987
Auto/RV/Motorsports Dealership	$450	75%	$165,486,967	367,749
TOTAL RETAIL CATEGORIES ONLY	**$351**	**61%**	**$765,447,831**	**2,179,319**

5

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

To account for this spending inflow originating outside of the City of Grande Prairie, Cushing Terrell created the Primary and Secondary Trade Areas.

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

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

Table 5.2 illustrates the magnitude of retail floorspace demand that is attributable to the remainder of the Primary Trade Area (98,900 residents), but excluding the City of Grande Prairie.

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

The resulting analysis in **Table 5.2** reveals supportable floorspace demand of 2.1 million sf and an estimated market share of 61% attributable to residents in the Primary Trade Area (excluding City of Grande Prairie).

TABLE 5.3

TOTAL PTA (INCLUDING GRANDE PRAIRIE) RETAIL FLOORSPACE DEMAND

Retail Spending by Merchandise Category	2016			
	PTA Incl GP Retail Sales Productivity ($psf)	Inflow & Retained Market Share	Inflow & Retained Sales $	Floorspace Demand (sf)
Grocery & Specialty Foods	$550	75%	$356,818,176	648,760
Pharmacy	$550	66%	$36,916,807	67,121
Alcohol & Tobacco	$500	67%	$44,555,261	89,111
Personal Services	$200	67%	$70,503,697	352,518
Clothing & Apparel	$275	70%	$107,580,234	391,201
Footwear	$275	70%	$26,251,374	95,460
Jewelry & Accessories	$500	71%	$19,972,389	39,945
Health & Beauty	$450	70%	$30,791,673	68,426
Home Furnishings & Accessories	$275	52%	$71,212,728	258,955
Home Electronics & Appliances	$450	54%	$130,081,176	289,069
Home Improvement & Gardening	$225	65%	$53,954,368	239,797
Books & Multimedia	$200	48%	$22,795,924	113,980
Sporting Goods & Recreation	$250	62%	$16,913,098	67,652
Toys & Hobbies	$250	62%	$7,623,235	30,493
Miscellaneous Specialty	$250	60%	$37,983,819	151,935
Full-Service F&B	$450	74%	$94,841,562	210,759
Limited Service F&B	$550	68%	$37,878,340	68,870
Entertainment & Leisure	$175	78%	$69,958,967	399,766
Auto Parts & Accessories	$375	64%	$21,120,834	56,322
Auto/RV/Motorsports Dealership	$450	81%	$306,281,160	680,625
TOTAL RETAIL CATEGORIES ONLY	**$362**	**69%**	**$1,564,034,822**	**4,320,765**

TABLE 5.4

STA WEST RETAIL FLOORSPACE DEMAND

Retail Spending by Merchandise Category	2016			
	STA West Retail Sales Productivity ($psf)	Inflow Market Share	Inflow Sales $	Floorspace Demand (sf)
Grocery & Specialty Foods	$550	5%	$8,922,303	16,222
Pharmacy	$550	5%	$1,108,382	2,015
Alcohol & Tobacco	$500	5%	$1,400,417	2,801
Personal Services	$200	5%	$1,840,162	9,201
Clothing & Apparel	$275	25%	$13,750,472	50,002
Footwear	$275	25%	$3,461,579	12,588
Jewelry & Accessories	$500	25%	$2,255,100	4,510
Health & Beauty	$450	25%	$4,098,644	9,108
Home Furnishings & Accessories	$275	20%	$8,609,972	31,309
Home Electronics & Appliances	$450	25%	$22,573,551	50,163
Home Improvement & Gardening	$225	15%	$3,308,232	14,703
Books & Multimedia	$200	20%	$3,346,568	16,733
Sporting Goods & Recreation	$250	25%	$2,497,523	9,990
Toys & Hobbies	$250	25%	$1,104,999	4,420
Miscellaneous Specialty	$250	25%	$5,412,240	21,649
Full-Service F&B	$450	15%	$7,085,502	15,746
Limited Service F&B	$550	10%	$2,014,571	3,663
Entertainment & Leisure	$175	15%	$4,857,485	27,757
Auto Parts & Accessories	$375	5%	$665,255	1,774
Auto/RV/Motorsports Dealership	$450	25%	$34,373,362	76,385
TOTAL RETAIL CATEGORIES ONLY	**$348**	**16%**	**$132,686,318**	**380,739**

TABLE 5.5

STA EAST RETAIL FLOORSPACE DEMAND

Retail Spending by Merchandise Category	2016			
	STA East Retail Sales Productivity ($psf)	Inflow Market Share	Inflow Sales $	Floorspace Demand (sf)
Grocery & Specialty Foods	$550	10%	$10,729,045	19,507
Pharmacy	$550	10%	$1,041,367	1,893
Alcohol & Tobacco	$500	10%	$1,380,023	2,760
Personal Services	$200	10%	$1,731,379	8,657
Clothing & Apparel	$275	15%	$3,855,916	14,022
Footwear	$275	15%	$974,694	3,544
Jewelry & Accessories	$500	15%	$646,092	1,292
Health & Beauty	$450	15%	$1,157,251	2,572
Home Furnishings & Accessories	$275	10%	$1,987,487	7,227
Home Electronics & Appliances	$450	15%	$6,373,612	14,164
Home Improvement & Gardening	$225	10%	$1,390,606	6,180
Books & Multimedia	$200	10%	$809,600	4,048
Sporting Goods & Recreation	$250	15%	$712,765	2,851
Toys & Hobbies	$250	15%	$317,490	1,270
Miscellaneous Specialty	$250	15%	$1,528,714	6,115
Full-Service F&B	$450	5%	$1,115,861	2,480
Limited Service F&B	$550	5%	$475,822	865
Entertainment & Leisure	$175	10%	$1,489,028	8,509
Auto Parts & Accessories	$375	10%	$608,523	1,623
Auto/RV/Motorsports Dealership	$450	10%	$6,391,074	14,202
TOTAL RETAIL CATEGORIES ONLY	**$361**	**11%**	**$44,716,350**	**123,781**

5 958,000 SF

ESTIMATED RESIDUAL RETAIL DEMAND IN CITY (as of Feb 2016)

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

Table 5.3 illustrates to combined demand resulting from the Total Primary Trade Area, including the City of Grande Prairie. The figures reveal demand for approximately 4.3 million sf of retail at a combined market share of approximately 69%.

Secondary Trade Area West Supply - Demand

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

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

Table 5.4 reveals the demand for floorspace in the City of Grande Prairie attributable to residents in the STA West at approximately 380,700 sf at a market share of 16%.

Secondary Trade Area East Supply - Demand

Table 5.5 reveals demand for floorspace in the City of Grande Prairie attributable to residents in the STA East at approximately 123,800 sf at a market share of 11%.

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

Secondary Trade Area North Supply - Demand

Table 5.6 reveals demand for floorspace in the City of Grande Prairie attributable to residents in the STA West at approximately 194,500 sf at a market share of 33%.

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

Total Trade Area Supply - Demand

Table 5.7 aggregates the total demand for floorspace in the City of Grande Prairie attributable to residents of the Primary and Secondary Trade Areas at approximately 5.01 million.

When compared against the current city's retail inventory or supply at 4.06 million sf, the difference between demand and supply equates to almost 958,000 sf of residual retail demand that could be supported in the City of Grande Prairie (this value includes current vacant space in the City).

If one factors into the equation a forecasted population growth of approximately +/-12,000 over the next decade (the majority of which will be in the City of Grande Prairie), then the estimated future floorspace demand could grow by approximately 720,000 sf (12,000 x 60 sf per capita). However, much of this future growth is likely to be part of existing residual demand thereby creating a very balanced retail market.

TABLE 5.6
STA NORTH RETAIL FLOORSPACE DEMAND

Retail Spending by Merchandise Category	2016			
	STA North Retail Sales Productivity ($psf)	Inflow Market Share	Inflow Sales $	Floorspace Demand (sf)
Grocery & Specialty Foods	$550	15%	$7,156,695	13,012
Pharmacy	$550	15%	$989,001	1,798
Alcohol & Tobacco	$500	15%	$1,010,909	2,022
Personal Services	$200	15%	$1,285,284	6,426
Clothing & Apparel	$275	50%	$6,770,693	24,621
Footwear	$275	50%	$1,763,093	6,411
Jewelry & Accessories	$500	50%	$1,022,385	2,045
Health & Beauty	$450	50%	$1,999,563	4,443
Home Furnishings & Accessories	$275	40%	$4,264,806	15,508
Home Electronics & Appliances	$450	50%	$10,835,890	24,080
Home Improvement & Gardening	$225	40%	$3,471,936	15,431
Books & Multimedia	$200	20%	$748,358	3,742
Sporting Goods & Recreation	$250	50%	$1,144,098	4,576
Toys & Hobbies	$250	50%	$504,238	2,017
Miscellaneous Specialty	$250	50%	$2,931,533	11,726
Full-Service F&B	$450	20%	$2,199,700	4,888
Limited Service F&B	$550	15%	$683,976	1,244
Entertainment & Leisure	$175	20%	$1,446,640	8,267
Auto Parts & Accessories	$375	10%	$380,439	1,015
Auto/RV/Motorsports Dealership	$450	50%	$18,573,328	41,274
TOTAL RETAIL CATEGORIES ONLY	**$356**	**33%**	**$69,182,560**	**194,546**

TABLE 5.7
TOTAL TRADE AREA RETAIL FLOORSPACE DEMAND

Retail Spending by Merchandise Category	2016		
	Total Floorspace Demand (sf)	Current City Retail Inventory (sf)	Total Residual Demand (sf)
Grocery & Specialty Foods	697,502	551,700	-145,802
Pharmacy	72,828	99,550	26,722
Alcohol & Tobacco	96,693	75,657	-21,037
Personal Services	376,803	242,879	-133,924
Clothing & Apparel	479,845	423,218	-56,627
Footwear	118,003	29,603	-88,400
Jewelry & Accessories	47,792	35,021	-12,771
Health & Beauty	84,549	69,529	-15,020
Home Furnishings & Accessories	313,000	118,874	-194,126
Home Electronics & Appliances	377,476	301,046	-76,430
Home Improvement & Gardening	276,112	288,300	12,188
Books & Multimedia	138,502	17,504	-120,998
Sporting Goods & Recreation	85,070	137,257	52,187
Toys & Hobbies	38,200	31,307	-6,893
Miscellaneous Specialty	191,425	253,337	61,912
Full-Service F&B	233,872	189,090	-44,782
Limited Service F&B	74,641	189,336	114,694
Entertainment & Leisure	444,298	217,000	-227,298
Auto Parts & Accessories	60,733	165,900	105,167
Auto/RV/Motorsports Dealership	812,486	361,150	-451,336
TOTAL RETAIL CATEGORIES ONLY	**5,019,832**	**3,797,256**	**-1,222,575**
	Including Vacant space	**264,494**	**-958,081**

5

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

5.3
RETAIL GAP ANALYSIS QUANTIFICATION

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

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

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

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

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

5.4
RETAIL INFLOW & OUTFLOW

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

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

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

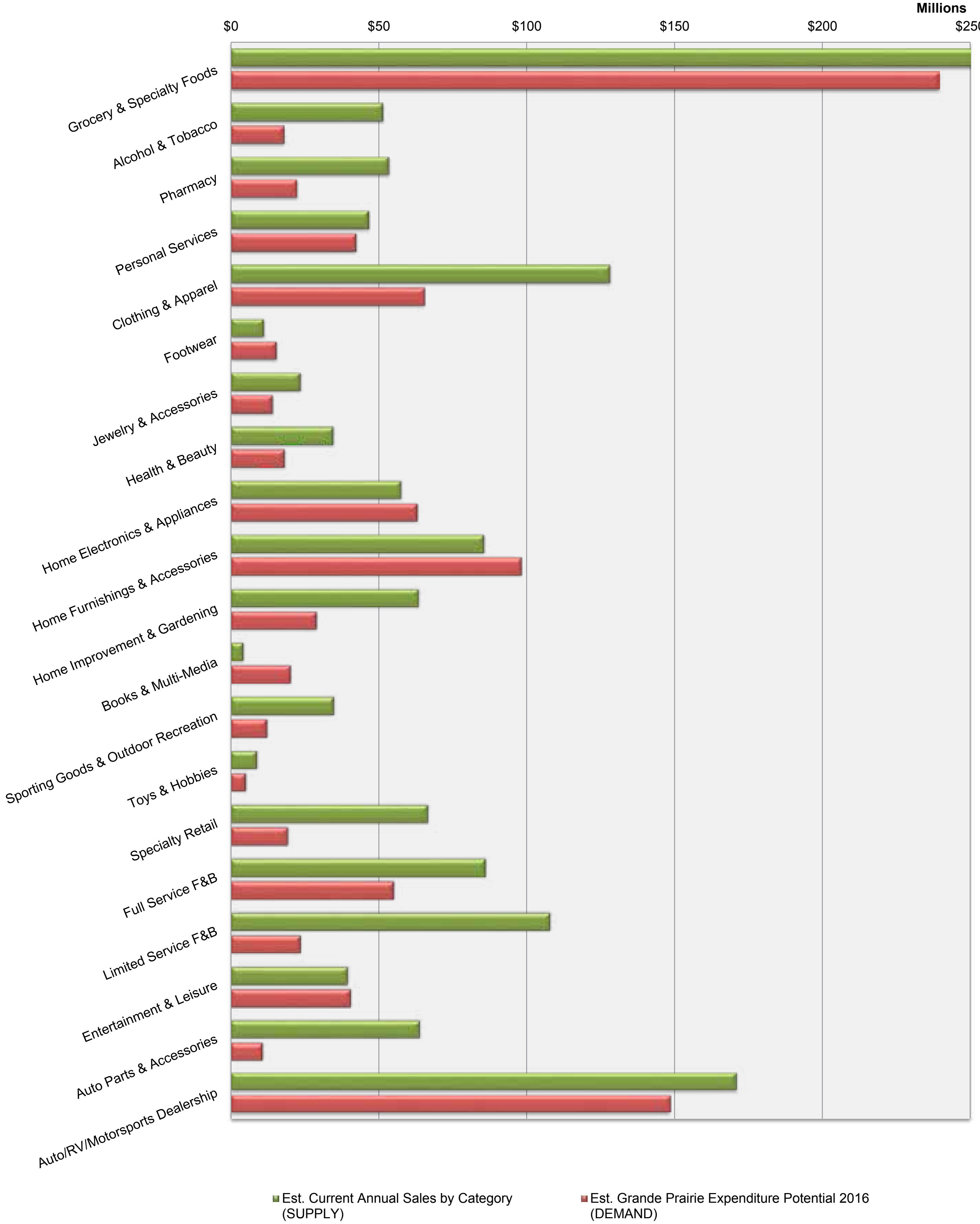
Outflow (sometimes referred to as Leakage) in an area represents a condition whereby a market's supply is less than the demand. In other words, retailers outside the market area are fulfilling the demand for retail products and thus demand is outflowing or leaking out of the normal or Primary Trade Area.

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

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

FIGURE 5.1

CITY OF GRANDE PRAIRIE RETAIL SPENDING SUPPLY AND DEMAND



5 $530 million

ESTIMATED NET INFLOW OF RETAIL SALES

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

In the case of Grande Prairie however, **Table 5.8** reveals a pattern in which only 4 categories exhibit noticeable sales outflow.

These categories include:

Books & Multi-Media:	Outflow Factor -65.2
Footwear:	Outflow Factor -15.9
Home Furnishings:	Outflow Factor -6.7
Home Electronics:	Outflow Factor -4.4

All other categories indicate balanced or positive Inflow factors, in many cases above 30.0, suggesting very strong Inflow dynamics.

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

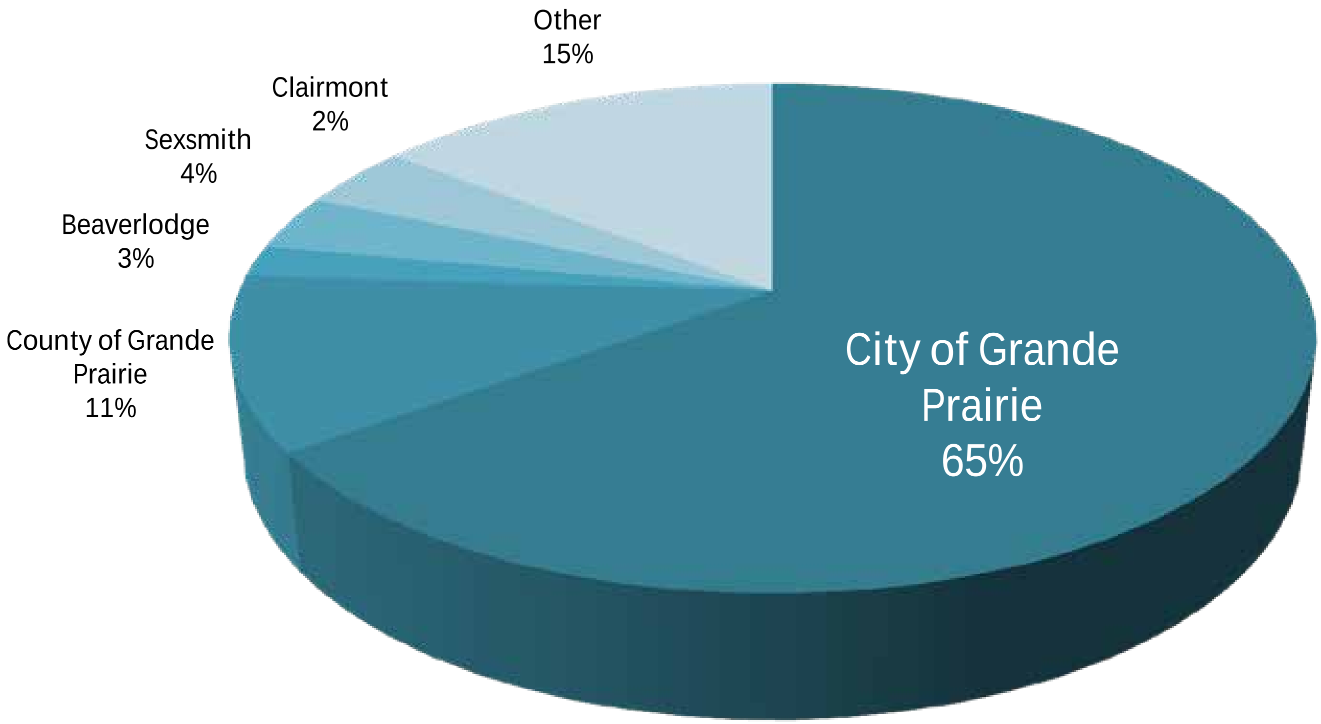
TABLE 5.8

RETAIL INFLOW / OUTFLOW ESTIMATES

Merchandise Category	Est. Current Annual Sales by Category (SUPPLY)	Est. Grande Prairie Expenditure Potential 2016 (DEMAND)	Grande Prairie Outflow / Inflow Estimates	Grande Prairie Outflow / Inflow Factor
Grocery & Specialty Foods	$350,748,750	$239,667,888	$111,080,862	18.8
Alcohol & Tobacco	$51,525,000	$18,074,880	$33,450,120	48.1
Pharmacy	$53,543,600	$22,367,664	$31,175,936	41.1
Personal Services	$46,846,900	$42,375,552	$4,471,348	5.0
Clothing & Apparel	$128,285,713	$65,471,232	$62,814,481	32.4
Footwear	$11,225,569	$15,464,064	-$4,238,495	-15.9
Jewelry & Accessories	$23,600,750	$14,133,552	$9,467,198	25.1
Health & Beauty	$34,712,213	$18,150,192	$16,562,021	31.3
Home Electronics & Appliances	$57,647,025	$62,985,936	-$5,338,911	-4.4
Home Furnishings & Accessories	$85,657,138	$98,031,120	-$12,373,983	-6.7
Home Improvement & Gardening	$63,601,875	$28,995,120	$34,606,755	37.4
Books & Multi-Media	$4,257,650	$20,233,824	-$15,976,174	-65.2
Sporting Goods & Outdoor Recreation	$34,909,313	$12,275,856	$22,633,457	48.0
Toys & Hobbies	$8,884,588	$5,146,320	$3,738,268	26.6
Specialty Retail	$66,785,625	$19,330,080	$47,455,545	55.1
Full Service F&B	$86,210,795	$55,018,428	$31,192,367	22.1
Limited Service F&B	$107,994,150	$23,607,300	$84,386,850	64.1
Entertainment & Leisure	$39,637,500	$40,467,648	-$830,148	-1.0
Auto Parts & Accessories	$63,993,750	$10,794,720	$53,199,030	71.1
Auto/RV/Motorsports Dealership	$171,095,625	$148,264,224	$22,831,401	7.1
VACANT				
TOTAL	**$1,491,163,526**	**$960,855,600**	**$530,307,926**	**21.6**

FIGURE 6.1

CONSUMER SURVEY RESPONDENTS RESIDENCE OF ORIGIN



6 CONSUMER INTERCEPT SURVEY

6.1
INTRODUCTION

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

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

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

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

6.2
RESPONDENT RESIDENCE

As a foundation for the Consumer Intercept Survey, the locations were chosen to get a valid cross-section of resident and consumer traffic flow in various areas of the city. Given that the surveys were conducted in February, locations with an indoor environment were chosen.

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 65% of respondents currently live in the City of Grande Prairie, with a further 11% living in the County of Grande Prairie, and the remaining from communities outside of the County, including British Columbia.

Furthermore, **Figures 6.2** illustrates in a heat map format the density by Forward Sortation Area (FSA is the first 3 digits of a postal code) from which Survey Respondents originated.

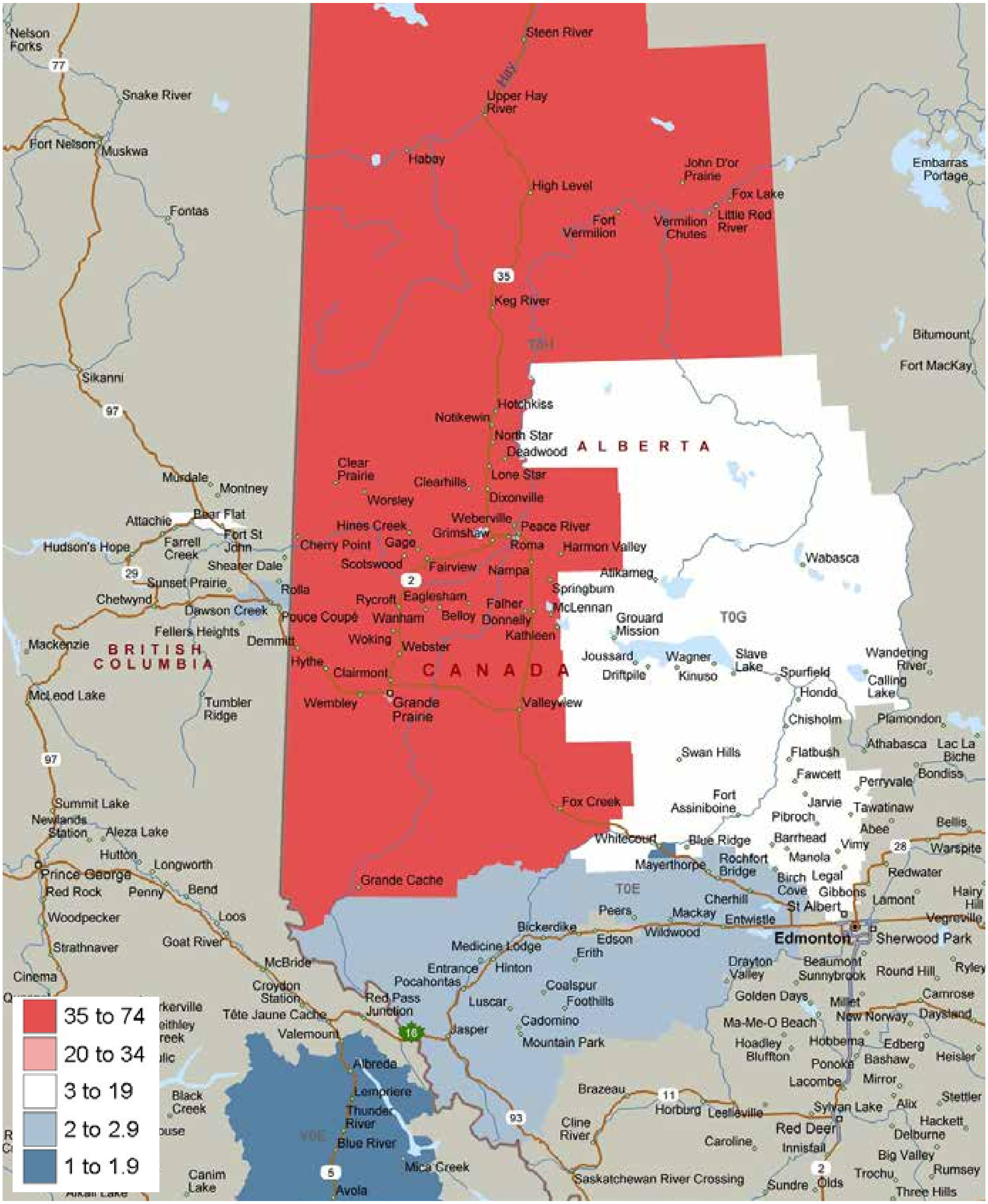
Figure 6.2 clearly illustrates a consistent pattern with the Retail Trade Area documented in **Figure 4.1**, in which the majority of patronage is sourced to the City and surrounding towns, but emanates westward into Northeastern British Columbia and north into Northern Alberta, with less dependence on communities to the east and south.

6.3
PREFERRED SHOPPING LOCATIONS

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

FIGURE 6.2

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



6

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

Figures 6.3 to 6.13 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 6.3 and 6.4 indicate that the Real Canadian Superstore continues to be the dominant location for consumers to shop for convenience necessities, such as groceries. The primary reason for this overwhelming dominance is the price of the goods/merchandise as well as the fact that the RCSS is close to their primary residence and allows for one-stop-shopping.

The Safeway location in the North has gained traction over the past couple years, while the Safeway South location has lost potential patronage due to competiton such as No Frills at South 40: this is likely in response to the increased number of stores that have come on stream at South 40 since 2014.

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

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

Primary Comparison Shopping Centre

Figures 6.5 and 6.6 illustrate that Prairie Mall, Wal-Mart and Westgate are the most dominant shopping centres for consumers looking for comparison merchandise, such as Clothing, Footwear, Books, Electronics, House & Home etc.

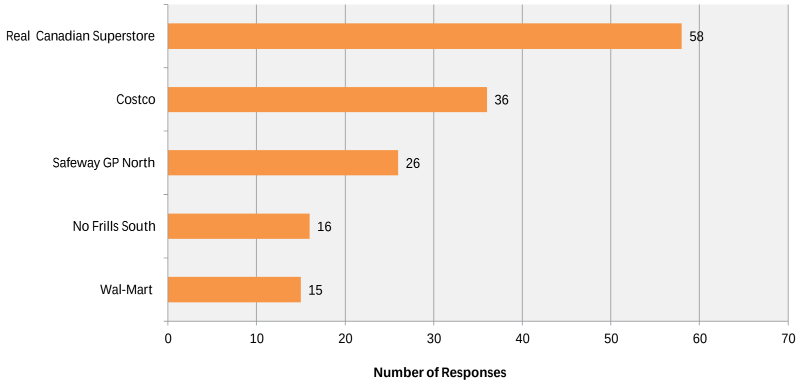
Since its opening in late 2013, Westgate has continued to gain prominence as a preferred location for consumers, based on the roster of current tenants as well as future tenant prospects. While Prairie Mall continues to be the top preferred comparison destination, the mall should note that its preference is being challenged by Westgate for comparison spending.

In terms of the reasons for shopping at an identified Comparison shopping location, the selection of shops ranks as the top reason, followed by the prices and the ability to one-stop-shop and increasingly the selection of shops, which is most likely why Westgate's response rate since 2014 has increased significantly.

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

FIGURE 6.3

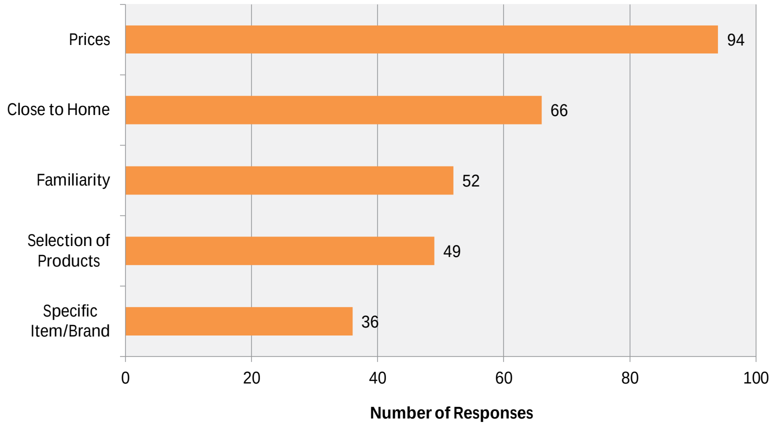
WHAT IS YOUR PRIMARY CONVENIENCE SHOPPING CENTRE?



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

FIGURE 6.4

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



Q1C: Reasons for Primary Convenience SC	2016	2014
Prices	94	88
Close to Home	66	95
Familiarity	52	43
Selection of Products	49	33
Specific Item/Brand	36	6
Sales Promos	34	34
One Stop Shop	32	41
Quality Products	29	41
Buy in Bulk	24	12
Customer Service	23	11
Close to Work/School	10	2
Meets Needs	10	8
Easy Access	7	3
Parking	2	2
In the Area	2	0
Not Crowded	1	1
Support Local	1	7
Hours of Operation	1	2
Convenience Items	0	5
Clothing	0	1
Quality of Stores	0	4
Total	**473**	**439**

6

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

Given the price consciousness of the respondents, Grande Prairie could attract price points and broader market appeal tenants. For example, a tenant such as H&M may well be served to be presented with the opportunity.

The challenge for a retailer like H&M or other similar fashion brands would be the requirement for an indoor retail space at the Prairie Mall. It would be incumbent upon the Prairie Mall ownership and management to continue to find ways of creating high value spaces for attracting tenants that consumers have indicated they would like to see, but for whom their only preferred location would be the regional enclosed mall. The former Target space is very high on Morguard's agenda for improving to accommodate new-to-market tenants for whom the mall is a perfect format.

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

Similarly, restaurants like Cactus Club typically would want a higher profile urban location within which to set up a location, however as they expand in the Alberta Market and seek out youthful and well-educated patrons, the Grande Prairie Market could represent a future target.

6.4 LIKES & DISLIKES OF RETAIL IN GRANDE PRAIRIE

Figures 6.7 and 6.8 highlight the "likes" and "dislikes" of the respondents as it relates to the current shopping opportunities in Grande Prairie.

Overwhelmingly, respondents like the influx of new stores, which has created a natural tendency to also like the overall selection of stores. In fact, the number of respondents that indicated a dislike for the selection of stores in 2014 declined dramatically in 2016, thus indicating the success of projects such as Westgate and South 40. This positive condition also comes after the departure of Target.

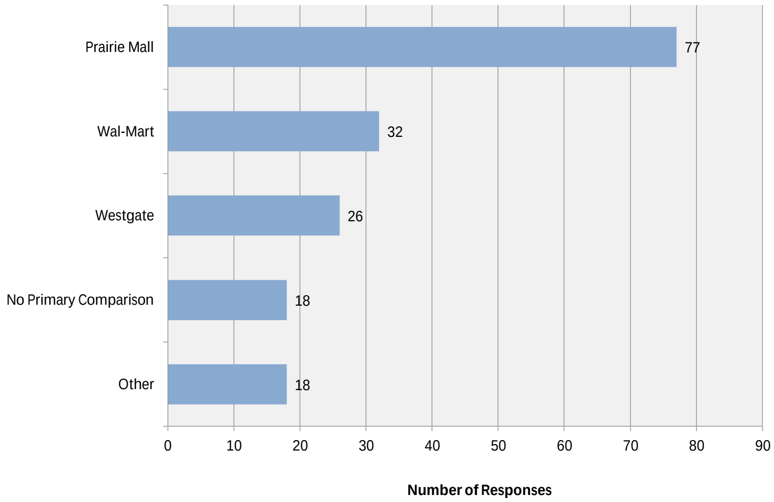
The aspirational nature of the Grande Prairie consumer is now being teased, whereby they are responding positively to the growth and introduction of stores in the market, but still want to have more retailers that they are accustomed to seeing in other markets such as Edmonton. Examples are indicated in **Figures 6.9 through 6.13** and include shops that could locate in Power Centre and/or Enclosed Mall formats.

Since 2014, the nature of new development and improvement at stores such as Safeway in the North, South 40, Westgate etc. have created a more positive retail culture for respondents whereby they also have less specific dislikes.

It also appears that since 2014, the number of respondents who noted a dislike for the selection of restaurants has dropped dramatically, which could be in response to entrants such as Brown's Social House and State & Main, among others.

FIGURE 6.5

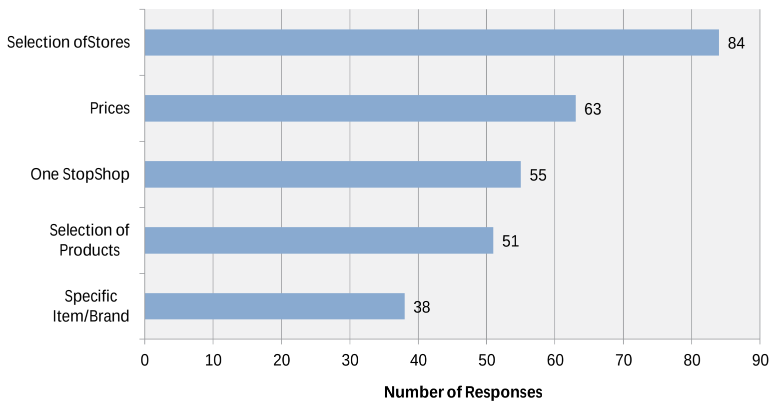
WHAT IS YOUR PRIMARY COMPARISON SHOPPING CENTRE?



Q2A: Primary Comparison SC	2016	2014
Prairie Mall	77	89
Wal-Mart	32	26
Westgate	26	9
No Primary Comparison	18	10
Other	18	33
Costco	17	21
Online	9	0
Real Canadian Superstore	2	3
Gateway	1	2
Canadian Tire	0	4
Downtown	0	3
Total	**200**	**200**

FIGURE 6.6

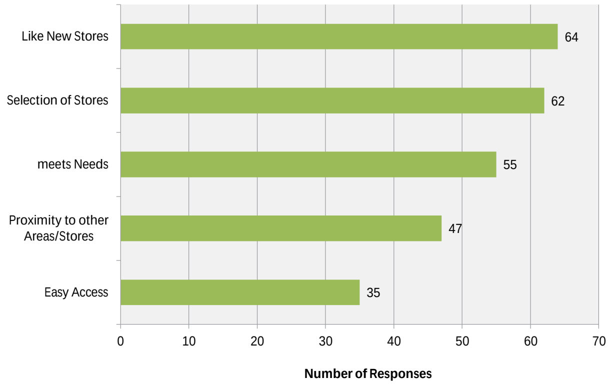
WHAT IS YOUR PRIMARY REASON FOR CHOOSING A COMPARISON SHOPPING CENTRE?



Q2C: Reasons for Primary Comparison SC	2016	2014
Selection ofStores	84	78
Prices	63	65
One StopShop	55	51
Selection of Products	51	30
Specific Item/Brand	38	7
Shop Specific Store	35	18
Sales Promos	28	13
Clothing	22	13
Meets Needs	18	19
Close to Work/School	9	5
Customer Service	8	5
Easy Access	8	3
Close to Home	7	27
Familiarity	7	16
Day Out/Window Shop	5	10
Quality Products	5	13
In the Area	3	1
Not Crowded	2	4
Support Local	2	4
Buy in Bulk	1	4
Proximity to Other Areas	1	0
Stores Clustered	1	0
Parking	0	6
Comparison Items	0	3
Shoes	0	2
Gifts	0	4
Quality of Stores	0	4
Department Stores	0	3
Hours of Operation	0	3
No Taxes	0	1
Total	**453**	**412**

FIGURE 6.7

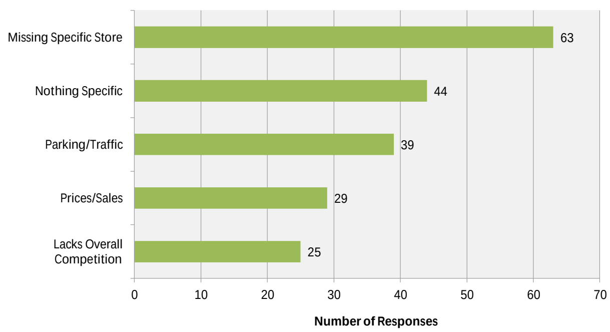
WHAT DO YOU LIKE MOST ABOUT SHOPPING IN GRANDE PRAIRIE?



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

FIGURE 6.8

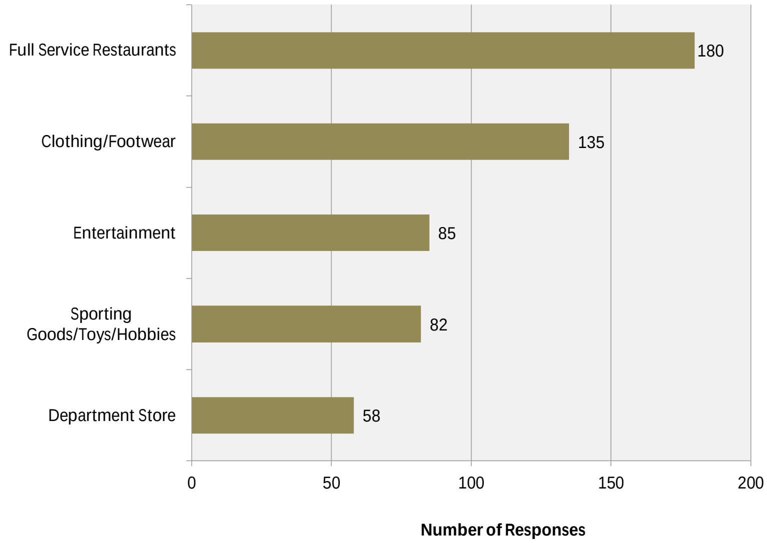
WHAT DO YOU DISLIKE MOST ABOUT SHOPPING IN GRANDE PRAIRIE?



Q21: Dislike Most About Shopping Opportunities in Grande Prairie	2016	2014
Missing Specific Store	63	17
Nothing Specific	44	30
Parking/Traffic	39	47
Prices/Sales	29	21
Lacks Overall Competition	25	0
Customer service	21	35
Lacks Department Stores	14	1
Crowded	10	26
Selection of Stores	10	75
Lacks Stores/Activities Downtown	10	0
Entertainment	9	25
Road Conditions	5	0
Not in Stock	4	6
Professional/Personal Services	3	12
Not Pedestrian Friendly	3	10
Access	2	5
Selection of Restaurants	2	21
Hours of Operation	2	6
Need Bigger Mall	2	1
Dislike of New Stores	1	0
Transit	1	0
Selection of Products	0	4
Does Not Support Local	0	1
Total	**299**	**343**

FIGURE 6.9

WHAT NEW STORES/SERVICES WOULD INCREASE YOUR SPENDING IN GRANDE PRAIRIE?



Q22: New Stores or Services to Increase Spending/Visits in Grande Prairie	2016	2014
Full Service Restaurants	180	206
Clothing/Footwear	135	183
Entertainment	85	63
Sporting Goods/Toys/Hobbies	82	84
Department Store	58	12
Books/Music/DVD	36	30
Home Furnishings/Appliances	35	36
Professional/Financial Services	32	41
Specialty Retail	24	32
More Overall Competition	21	0
Electronics/Computers	17	7
Coffee/Cafes/Fast Food	16	36
Personal Services	14	4
Grocery/Pharmacy	13	14
More Local Stores	11	0
Junior Box Outlet Store	10	6
Office Supply Items	8	6
Pet Supply Services	7	4
Nothing Specific	5	4
Fitness Club/Day Spa	4	5
Bigger Mall	4	8
Improve Transit	3	0
Home Improvement & Garden	2	2
Automotive	2	10
Total	**804**	**793**

Photo: Kieron Hunt

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6.5

DESIRED SHOPS & SERVICES

Figures 6.8 through 6.12 illustrate the responses to questions that sought the following:

1. What New Stores/Services would increase your spending in Grande Prairie? (**Figure 6.9**)
2. What Full-Service Restaurants do you want to see in Grande Prairie? (**Figure 6.10**)
3. What Limited-Service Restaurants do you want to see in Grande Prairie? (**Figure 6.11**)
4. What Retail Stores do you want to see in Grande Prairie? (**Figure 6.12**)
5. What types of stores do you want to see in Grande Prairie? (**Figure 6.13**)

Referring to **Figure 6.9,** which allows for multiple responses, respondents overwhelmingly want to see more Full-Service Restaurants (247 responses) and Clothing & Footwear stores (113 responses) in Grande Prairie. An increase in the quality and quantity of the above two categories would be well-received by the respondents and overall trade area residents.

Similarly, though to a slightly lesser degree, Sporting Goods, Toys & Hobbies and Entertainment have been identified. In the case of Sporting Goods and Toys & Hobbies, there may not be as many options as there are for Full-Service Restaurants or Clothing & Footwear, but tenants such as Sport Chek, Toys R Us and Cabelas were identified as among the most desired tenants, as revealed in **Figure 6.12**.

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

Top 3:

1. *Red Lobster*
2. *Olive Garden*
3. *Montana's Cookhouse*

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

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

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

"Local" Cafes and coffee shops continue to be in demand with optimal locations available throughout the city.

This suggests opportunities for more local independents, like the recent entry of Grande Prairie Coffee Co., for whom the downtown was their chosen location. In downtowns such as Grande Prairie where external development pressures have created challenges, it is often the local merchants and businesses that have the ability to create a "shop local" culture in redefining downtown spaces.

RED LOBSTER

MOST CITED RESTAURANT DESIRED BY CONSUMER RESPONDENTS

FIGURE 6.10
WHAT FULL-SERVICE RESTAURANTS DO YOU WANT TO SEE IN GRANDE PRAIRIE?

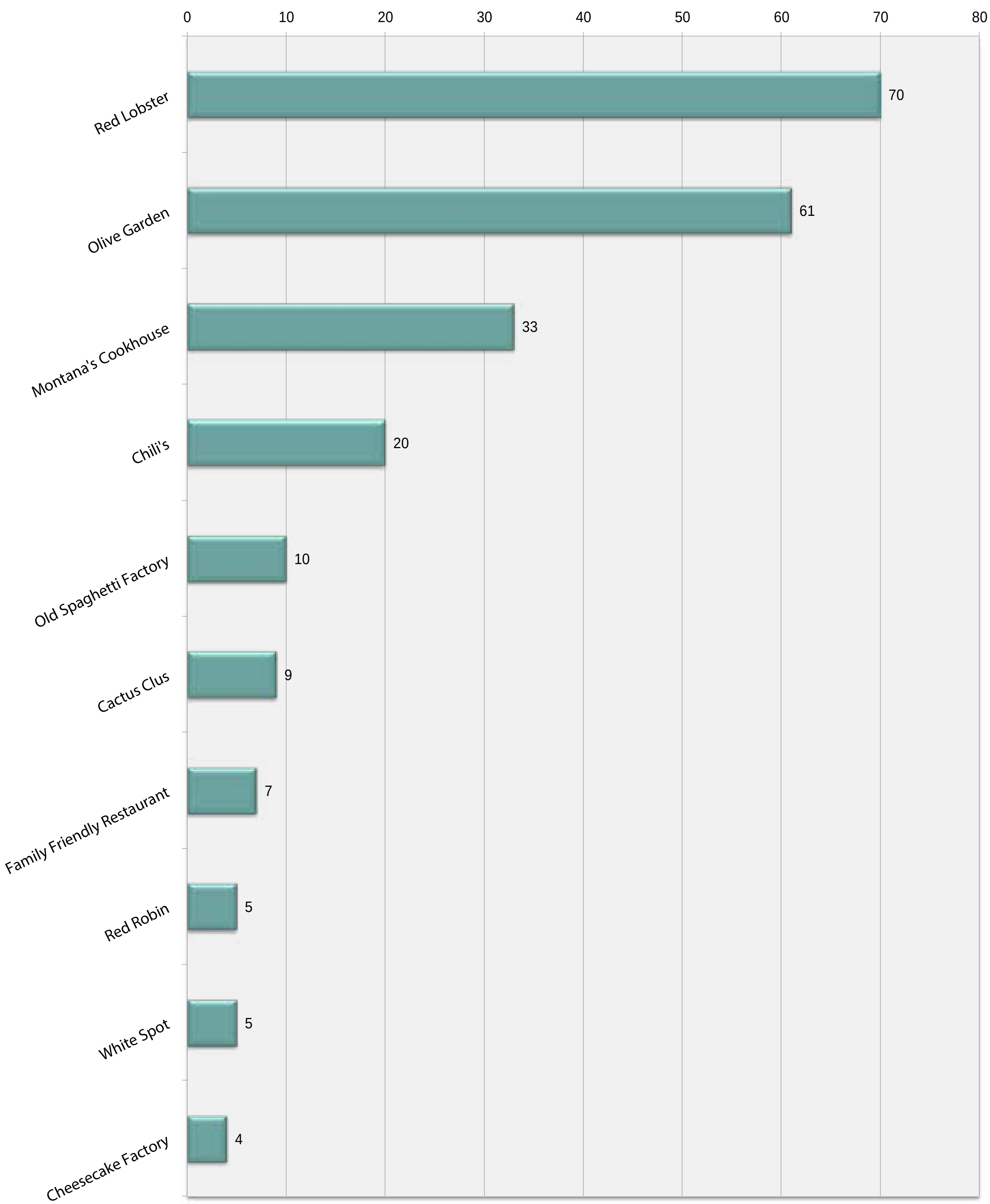

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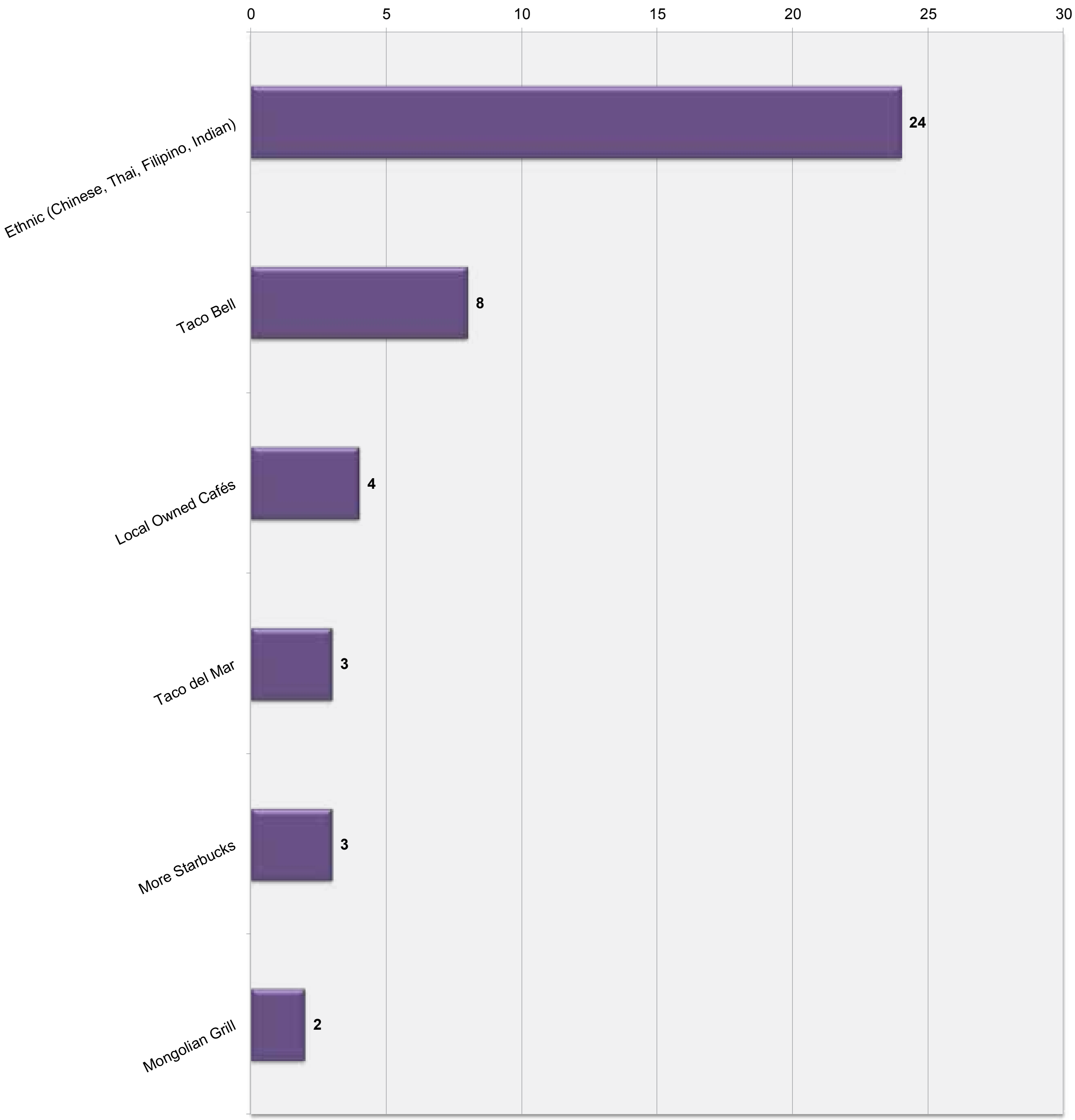
FIGURE 6.11

WHAT LIMITED-SERVICE RESTAURANTS DO YOU WANT TO SEE IN GRANDE PRAIRIE?



IKEA

MOST CITED RETAILER DESIRED BY CONSUMER RESPONDENTS

FIGURE 6.12
WHAT RETAIL STORES DO YOU WANT TO SEE IN GRANDE PRAIRIE?

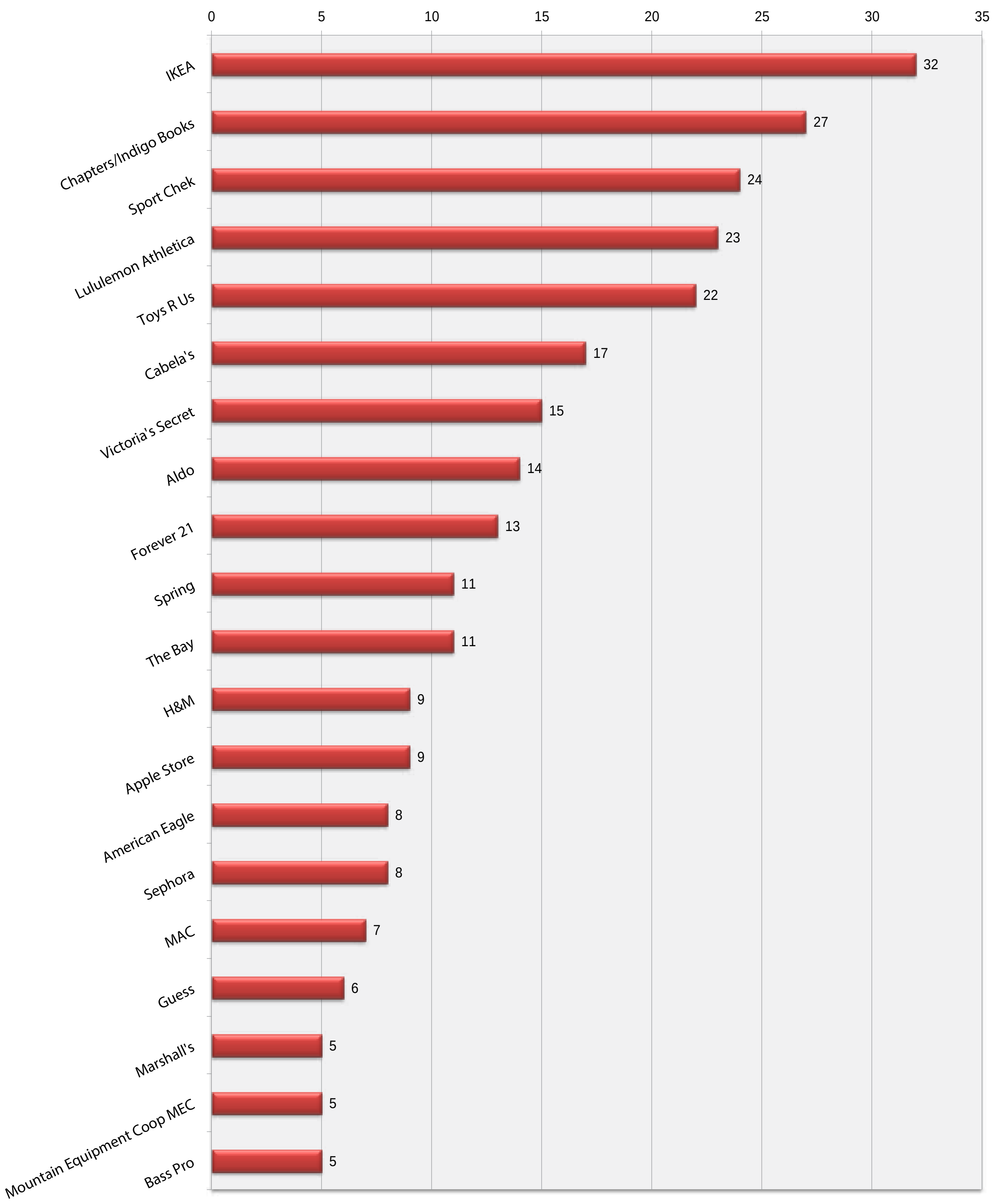


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FIGURE 6.13

WHAT TYPES OF STORES DO YOU WANT TO SEE IN GRANDE PRAIRIE?

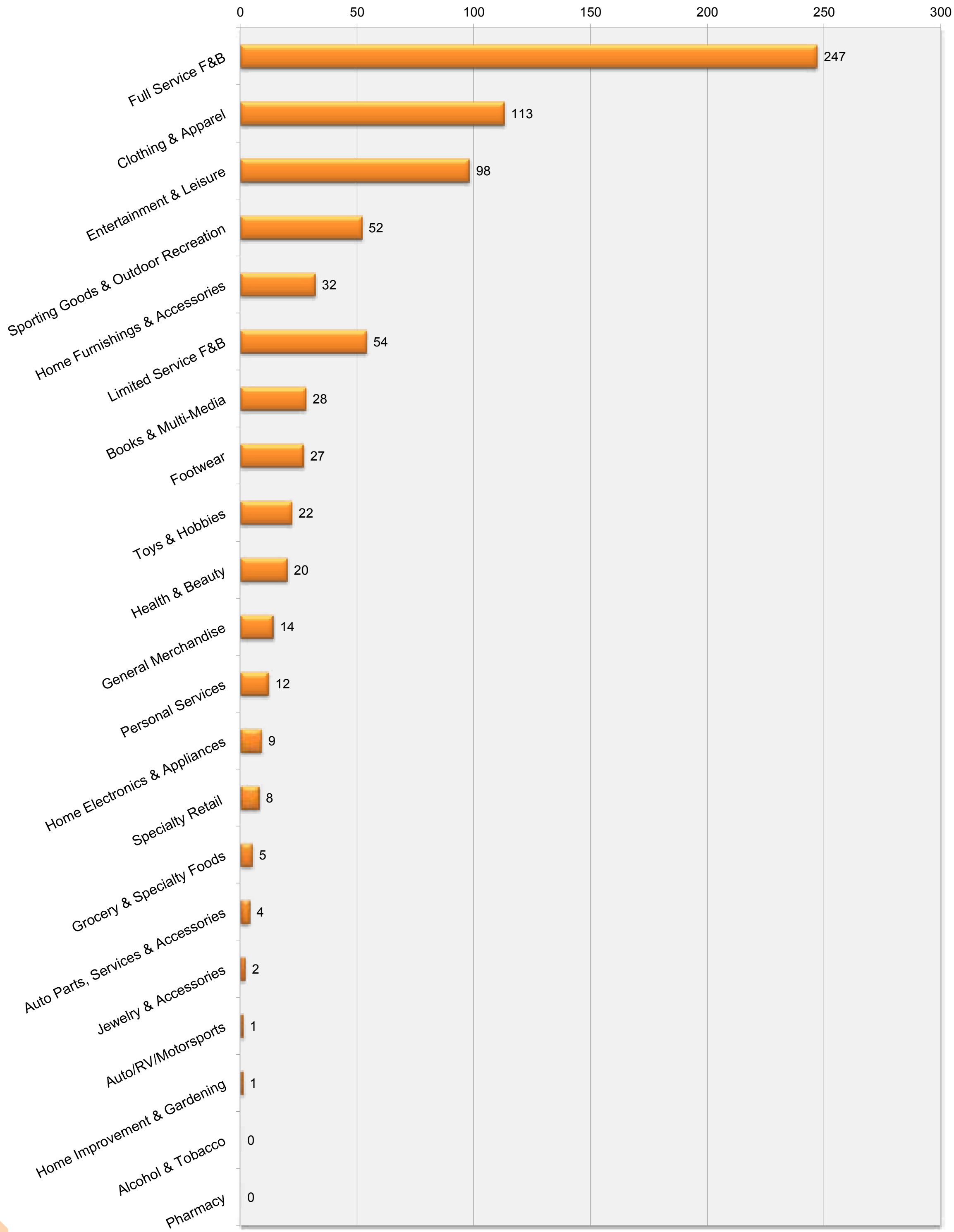
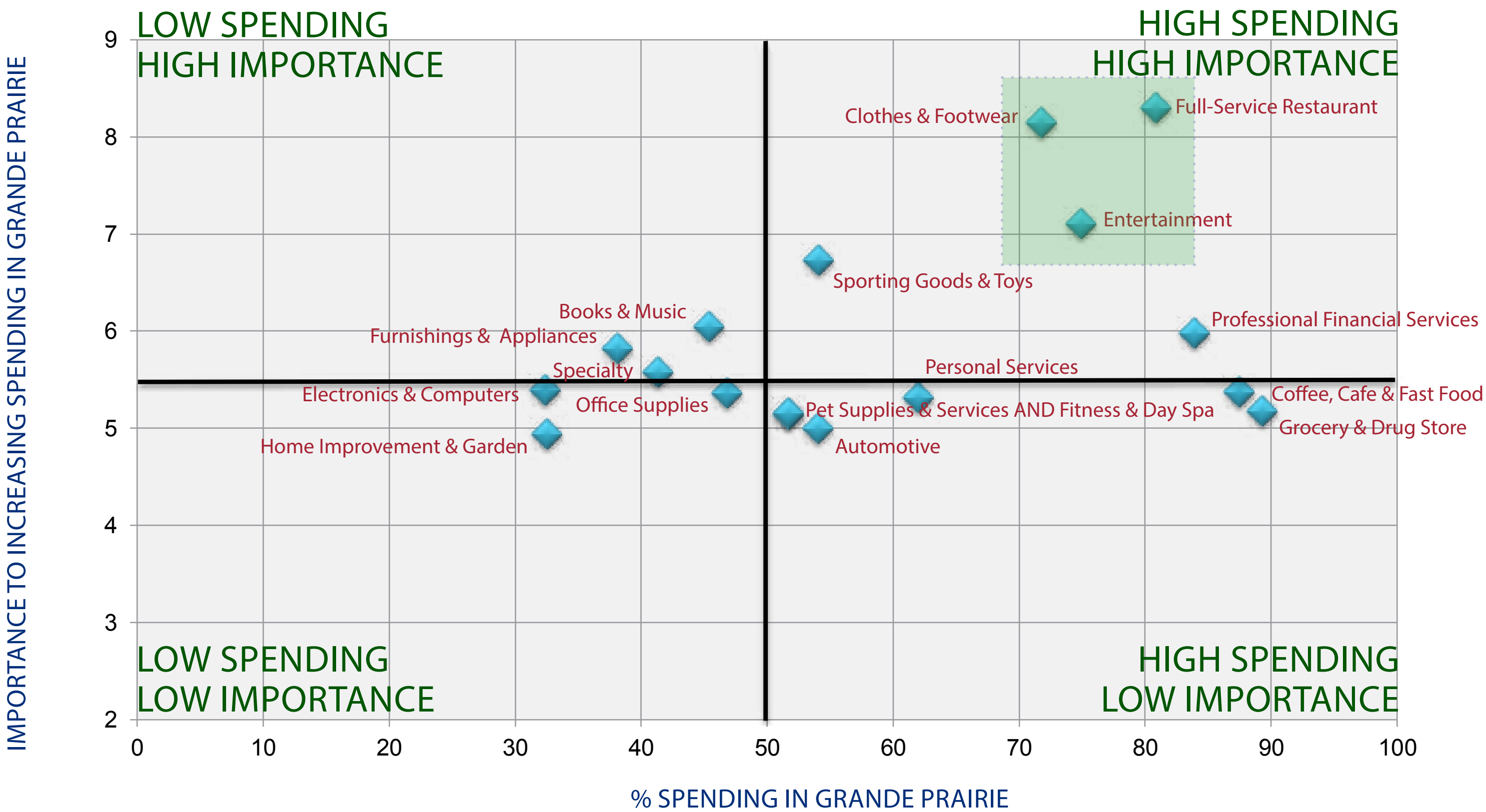


FIGURE 6.14

SPENDING VERSUS IMPORTANCE RATINGS FOR ALL RESPONDENTS



RESTAURANTS CLOTHING & FOOTWEAR ENTERTAINMENT

MOST DESIRED RETAIL CATEGORIES BY CONSUMER RESPONDENTS

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Figure 6.12 illustrates a desire for IKEA. Since the initial Retail Market & Gap Analysis in 2014, IKEA has announced a new format in the range of 30,000 sf for regional Canadian locations. This format would be a strategic fit for Grande Prairie and should be pursued rigoruously given the nature of home furnishings outflow and the Trade Area profile. Regardless, the identification of IKEA is indicative of a desire to have more Home Furniture & Decor at a more broad price point.

For retail stores such as American Eagle, Victoria's Secret, Sephora or Forever 21 (referring to **Figure 6.12**), Prairie Mall is likely the single best location in Grande Prairie and therefore the Mall Management and Ownership, as mentioned, should continue to be very proactive in identifying or reconfiguring the former Target space to accommodate the increased demand that is expected as the market continues to grow in population, income and aspiration.

6.6
ALL RESPONDENTS SPENDING VERSUS IMPORTANCE

Figures 6.14 to 6.20 take a more honed in approach in looking at the Consumer Responses by seeing where differences may exist in spending and importance ratings by Respondent Origin, Age Cohort and Household Income bracket.

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

The results shown diagrammatically in **Figure 6.14** illustrates that not surprisingly the categories comprising Full-Service Restaurants, Clothing & Footwear and Entertainment have the highest spending by respondents, but also have the highest importance rating to increasing spending in the city.

This validates the desire of respondents to have more diversity and quality in these areas and also provides further market support for prospective tenants looking into the Grande Prairie market.

However, categories such as Home Furnishings and Books & Music have a lower percentage of spending in Grande Praire, but do have a high importance when it comes to wanting those shops in the community as a way of garnering increased spending. Thus support and demand would seem to be strong for a physical "bricks and mortar" presence in the city.

At the other end of the spectrum, Grocery Stores and Cafes retain spending in the community, but survey results show a low desire for adding further inventory. This suggests that the current grocery market is in balance with consumer demands.

6.7
RESPONDENT CROSS-TABULATIONS OF SPENDING VERSUS IMPORTANCE

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

FIGURE 6.15

PERCENTAGE SPENDING IN GRANDE PRAIRIE BY RESPONDENT ORIGIN

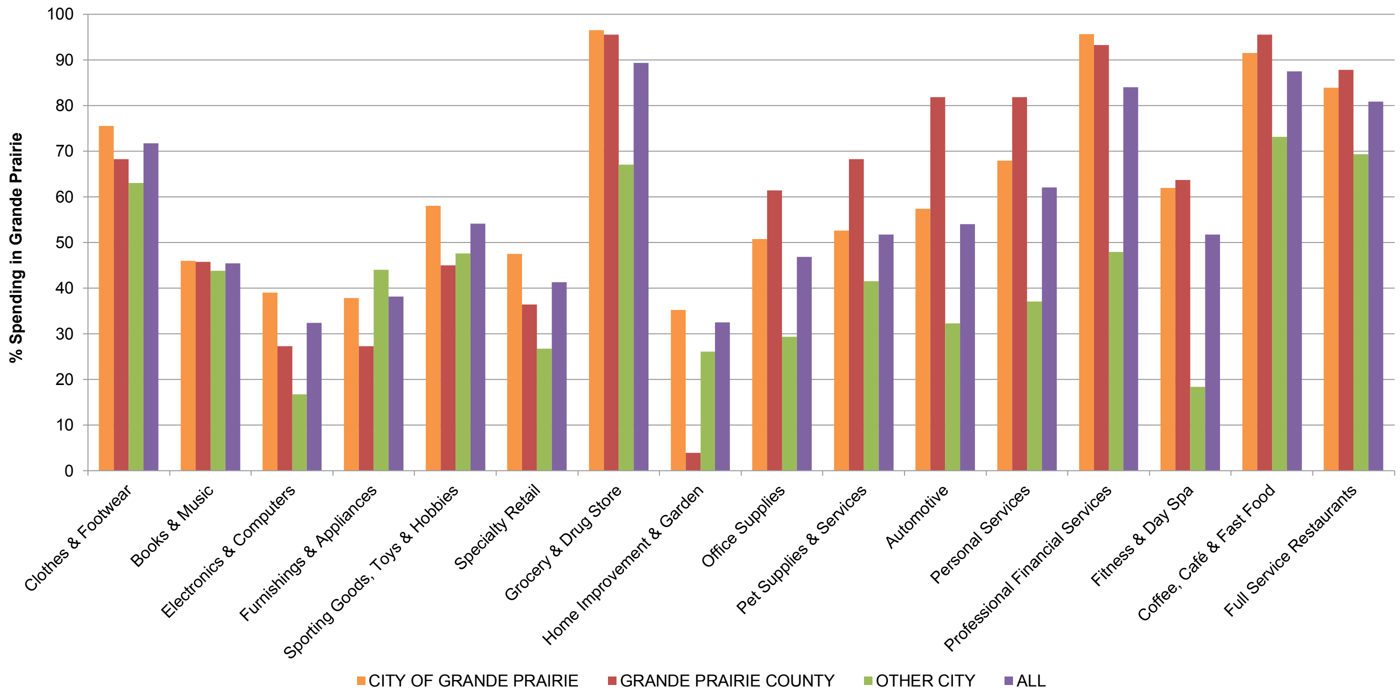
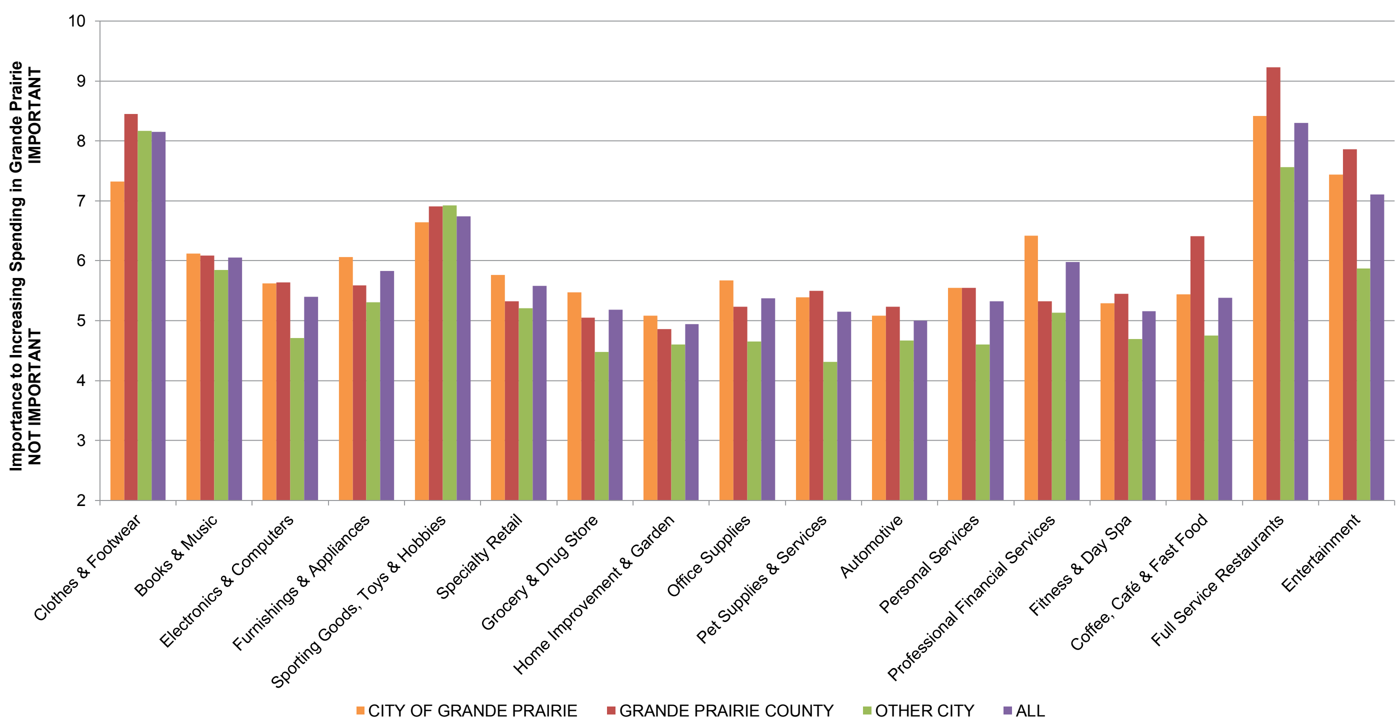


FIGURE 6.16

IMPORTANCE RATING TO INCREASE SPENDING BY RESPONDENT ORIGIN



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Spending & Importance By Respondent Origin

Figures 6.15 & 6.16 illustrate the spending and importance ratings for respondents as broken down into the Respondent origin of residence:

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

The figures illustrate that Grande Prairie County respondents contribute a significant share of retail spending in the City of Grande Prairie. In a survey of this nature, it is not surprising that the nearest area outside of the market area in which the survey was taken would have a strong spending profile. However, in the case of **Figure 6.15**, the amount of spending by Other City residents is quite healthy (more than 40% of spending) for categories such as Clothes & Footwear, Grocery, Coffee, Cafe & Fast Food and Full-Service Restaurant.

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

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

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

For residents of the City of Grande Prairie, an increase in the amount and/or quality of Entertainment, Professional/Financial Services, Full Service Restaurants and Clothes & Footwear would go a long way in retaining and attracting even further spending.

Spending & Importance By Respondent Age

Figures 6.17 & 6.18 illustrate the spending and importance ratings for respondents as broken down into the Respondent Age Cohort:

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

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

In terms of spending, the Baby Boomers or those 55 years and older have the strongest spending profile for categories such as Clothing & Footwear, Automotive, Personal Services and Full Service Restaurants.

However, when looking at the importance of these same categories to increasing spending, the Baby Boomer segment does not place as high a value on these as do the emerging younger age cohorts.

FIGURE 6.17

PERCENTAGE SPENDING IN GRANDE PRAIRIE BY RESPONDENT AGE COHORT

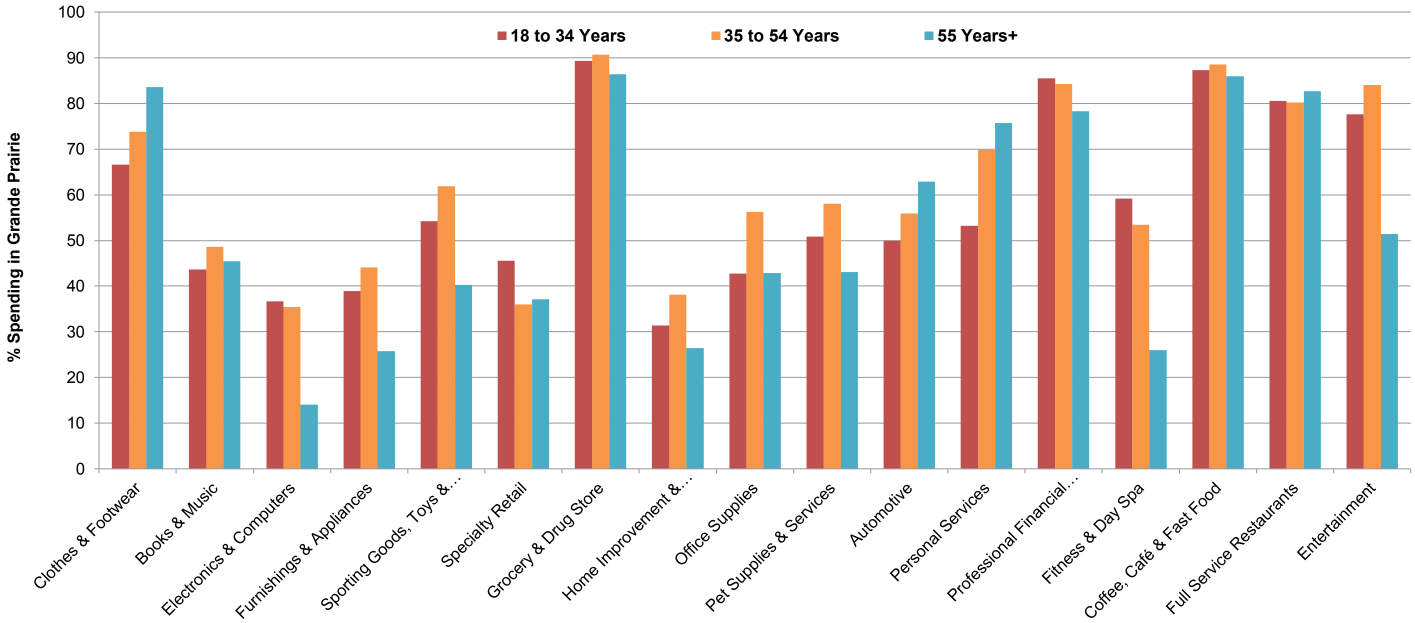
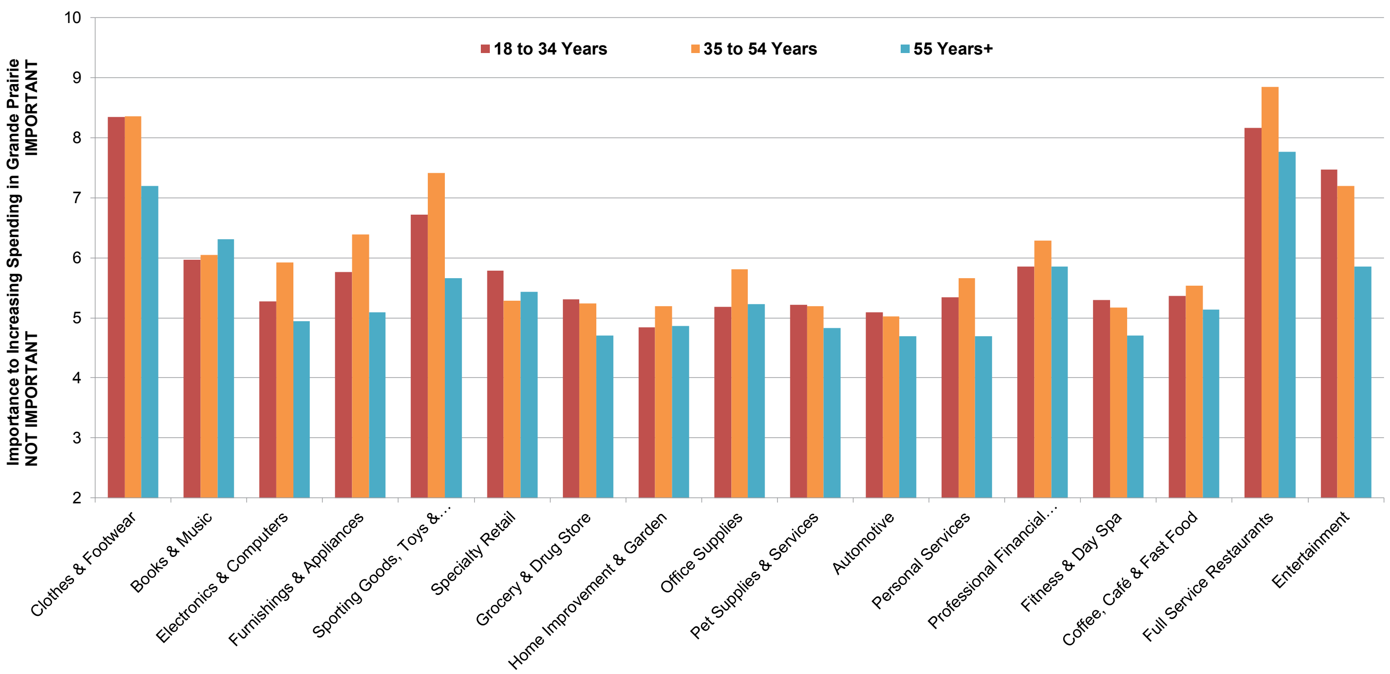


FIGURE 6.18

IMPORTANCE RATING TO INCREASE SPENDING BY RESPONDENT AGE COHORT



The implications of this finding are two-fold. Firstly, while the Baby Boomers are a strong spending segment today, they are not the growth demographic in Grande Prairie, as evidenced by the average age at just over 31 years. Moreover, this pattern suggests that Baby Boomers are generally happy and satisfied with the offering in the City of Grande Prairie, while the emerging growth cohort are not as satisfied and are seeking new experiences and formats.

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

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

The 18 - 35 year old age cohort represents another notable age bracket for spending on Entertainment, and has the highest importance on Entertainment to increase their spending.

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

Retail spending has thus far catered more to the older demographic, but as the age profile illustrates, future emphasis should be geared toward the next generation of consumers who want to support Grande Prairie businesses, but equally are prepared to leave Grande Prairie for purchases that could otherwise be accommodated in Grande Prairie.

Spending & Importance By Respondent Household Income

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

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

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

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

In fact, while that is true for some categories such as Home Improvement, Automotive and Professional Services, the income bracket comprising $55,000 to $100,000 exhibits the strongest expenditure patterns in the city for Electronics, Sporting Goods, Pet Supplies, Specialty Retail, Personal Services and Fitness.

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

FIGURE 6.19

PERCENTAGE SPENDING IN GRANDE PRAIRIE BY RESPONDENT HOUSEHOLD INCOME

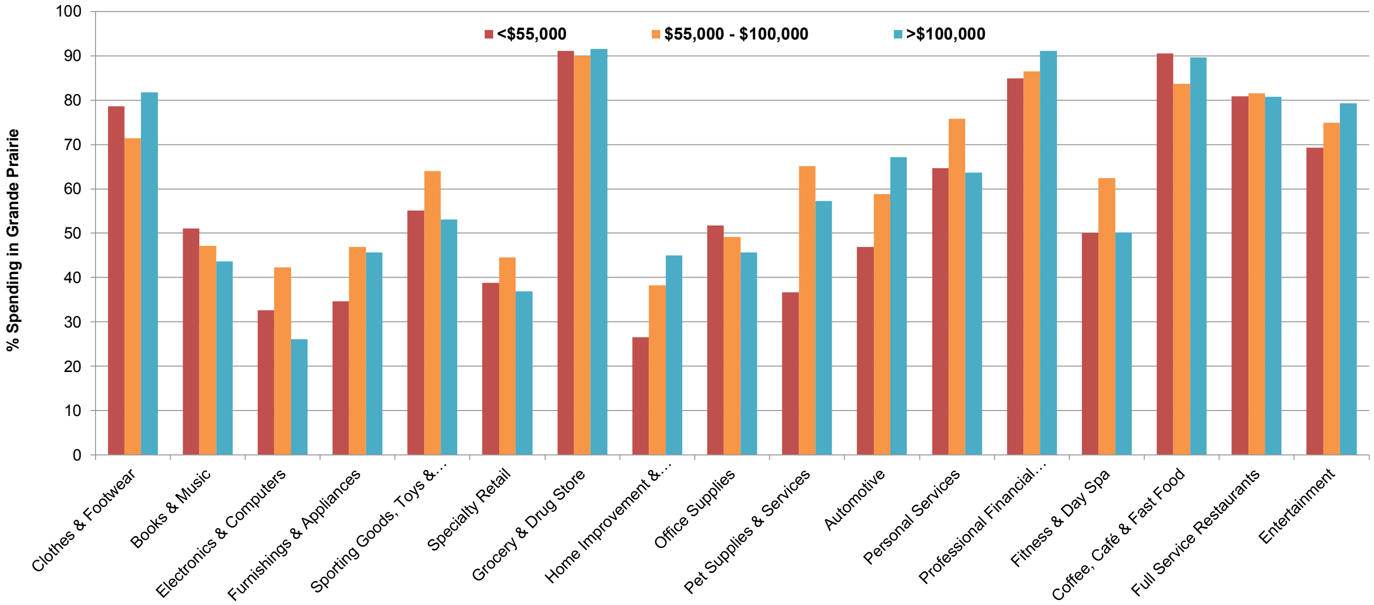
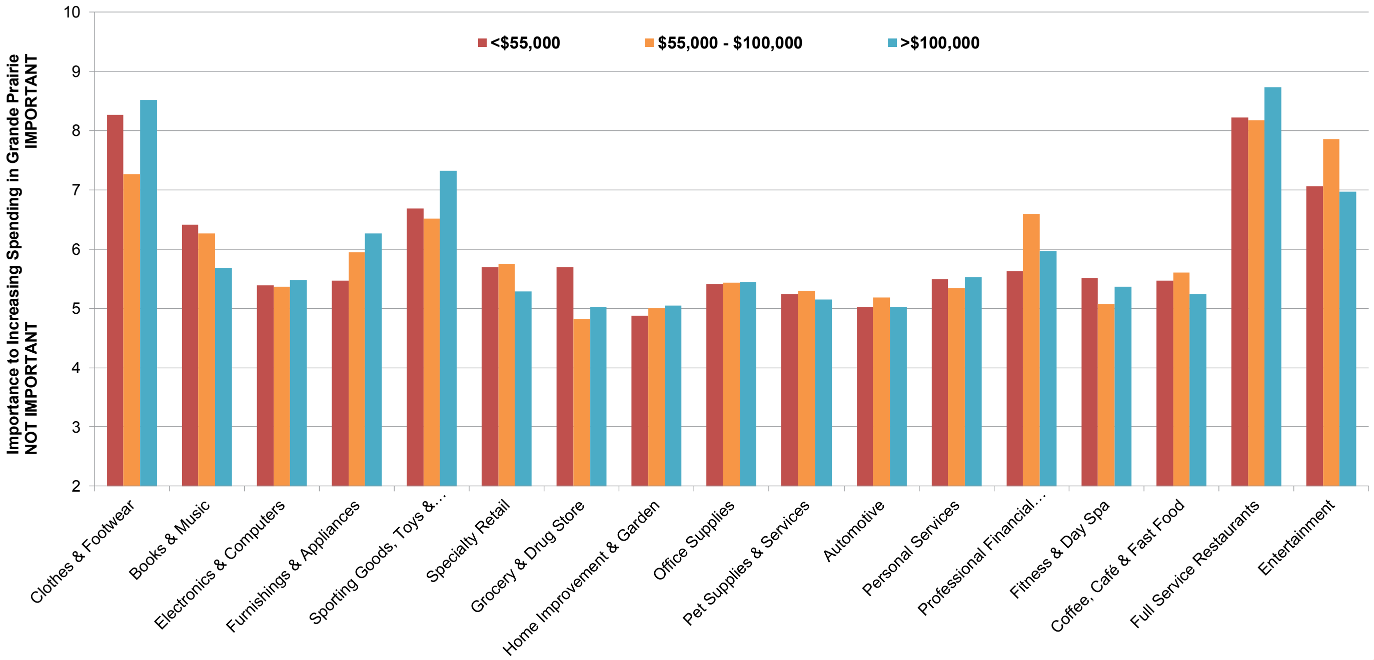


FIGURE 6.20

IMPORTANCE RATING TO INCREASE SPENDING BY RESPONDENT HOUSEHOLD INCOME



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

However, the importance rating for the lower and middle income segments is very important suggesting that the value orientation of the market and brands such as IKEA, Marshalls, H&M as well as other fashion formats and the already mentioned Olive Garden and Red Lobster would be very well positioned in the Grande Prairie market.

6.8 ON-LINE SPENDING PATTERNS

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

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

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

Figures 6.21 and 6.22 illustrate the on-line spending patterns by ALL Respondents and as broken down into age groups (18-34 Years, 34 - 55 Years and 55 Years +).

Figure 6.21 illustrates that, not unexpectedly, Books & Music and Clothes & Footwear are clearly the most dominant on-line shopping categories garnering 10.5% and 9.0% respectively of respondent spending. Overall however, on-line sales still account for less than 3% of retail sales.

When comparing this breakdown by age, **Figure 6.22** reveals that the most prominent spending on-line is by the 18-34 Year age cohort, particularly for Books & Music, Sporting Goods & Toys, and Specialty Retail.

However, the 35-54 Year age cohort spends the most on-line in the Clothes & Footwear category and Electronics & Computers, while the 55 Years + spend the least amount on-line for all categories.

The amount of on-line sales for Home Furnishings is restricted often times to the size and shipping costs, which is a further reason why IKEA should be pursued actively and would be a strong anchor to retaining sales in the city.

6.9 SUMMARY & IMPLICATIONS

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

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

FIGURE 6.21

PERCENTAGE OF ONLINE SPENDING BY SURVEY RESPONDENTS

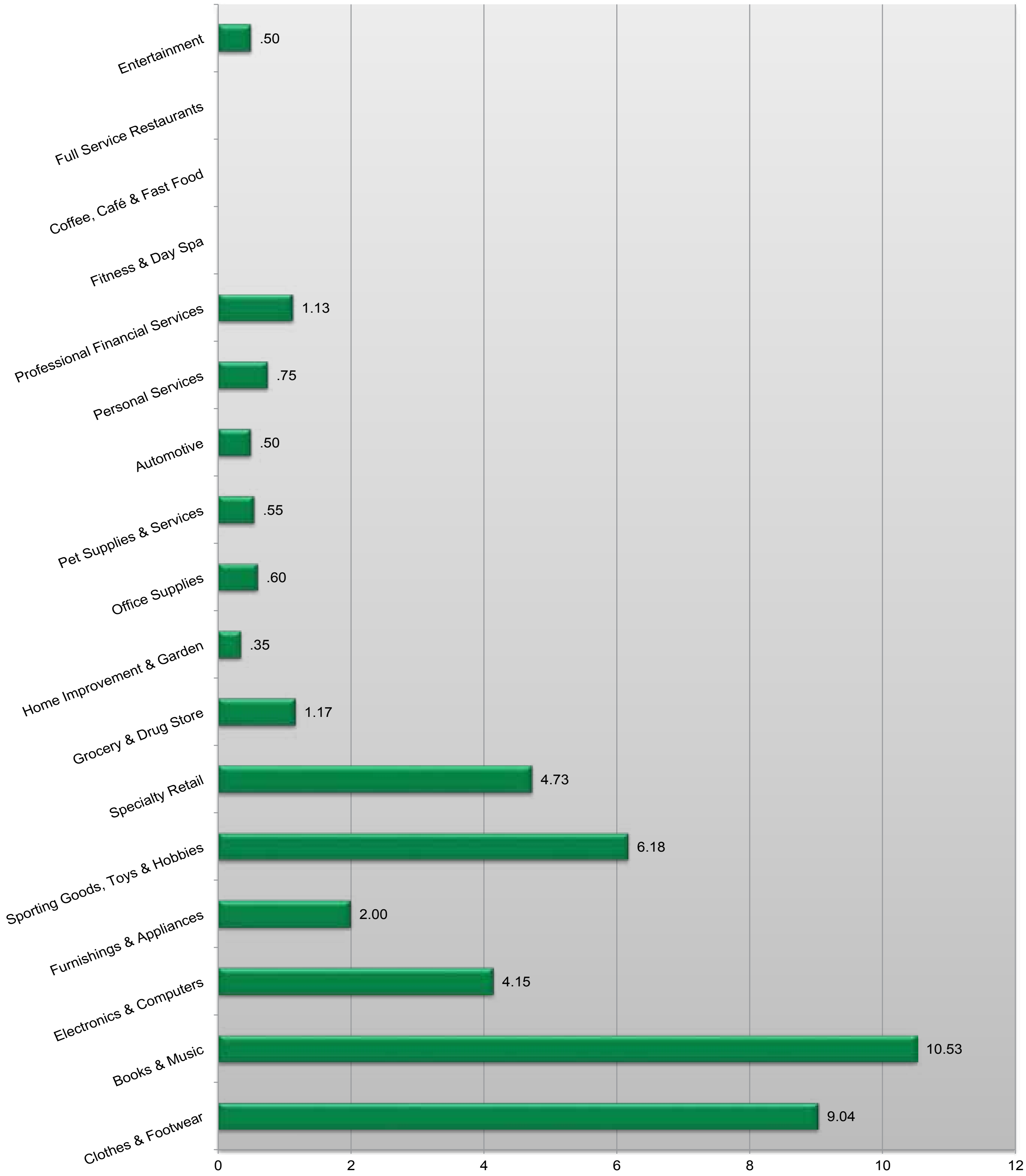


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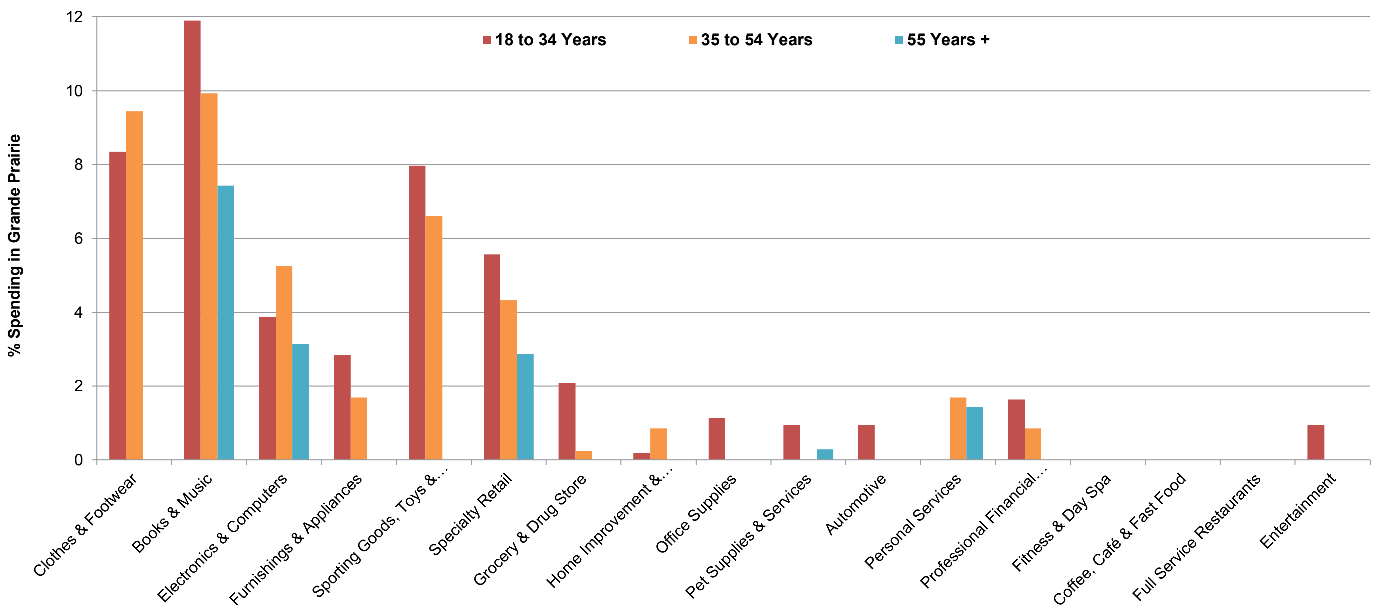
FIGURE 6.22

PERCENTAGE OF ONLINE SPENDING BY AGE COHORT



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

The types of tenants sought by respondents combined with their spending patterns suggests that the major locations that can fulfill retailer site location requirements will fall in the West Sector, North Sector and to a lesser degree the South Sector.

In the North Sector, the Prairie Mall must ensure that its merchandise positioning and layout strategy continues to evolve so that it can be in the best position to attract the progressive types of tenants that respondents identified in the Survey and for which Grande Prairie is a compatible market, while at the same time compete with the evolving comparison merchandise offering at Westgate.

The downtown area, will no doubt continue to face external pressures resulting from continued growth on the fringe of the City. The downtown is still recognized as a key node that can accommodate future tenant opportunities, particularly in the Entertainment and Food & Beverage categories.

The most significant appeal of Grande Prairie'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 Grande Prairie's 280,000 person Trade Area and validation from the Consumer Intercept Survey, Grande Prairie is well-positioned for growth.

Cabela's, Saskatoon. Photo: Kieron Hunt

7 CONCLUSION

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

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

The results of the Market Analysis yielded the following salient facts about Grande Prairie's Retail Market:

FACT - City of Grande Prairie serves a Total Trade Area of over 280,000 residents.

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

FACT - City of Grande Prairie's Primary Trade Area has over 167,000 residents.

FACT - City of Grande Prairie could support over 5.0 million sf of retail floorspace.

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

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

FACT - City of Grande Prairie has a net INFLOW of $530 million in Retail Sales.

FACT - City of Grande Prairies sales attraction and retention results in only $39 million in categories that exhibit retail sales OUTFLOW.

FACT - City of Grande Prairie has a current residual demand for 958,000 sf of retail space.

FACT - City of Grande Prairie could have demand for an additional 1.5 million sf of new retail space by 2026.

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

FACT - Residents want more than any other retailers IKEA, Chapters, Red Lobster and Olive Garden

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

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

RETAIL PROSPECTS

FOOD & BEVERAGE / ENTERTAINMENT / CONVENIENCES / SERVICES

7 RETAIL PROSPECTS

FASHION, SPORTING GOODS, HOUSE & HOME, WELLNESS

AMERICAN EAGLE OUTFITTERS ae.com
H&M
adidas
QUIKSILVER
FOREVER 21
Bench.
ROOTS
West49
zumiez
BANANA REPUBLIC
dynamite
URBAN PLANET
DAVID'S BRIDAL
lululemon athletica
HOLLISTER CALIFORNIA
lanebryant
LUSH
TIPTOP Tailors
VICTORIA'S SECRET
laVie en Rose
L'OCCITANE EN PROVENCE
MAC
Indigo Books · Gifts · Kids
SEPHORA
Saje NATURAL WELLNESS
Marshalls
ICING
triple flip
Solutions Your Organized Living Store
crocs
Home Outfitters
BOWRING ESTABLISHED IN 1811
SoftMoc www.softmoc.com
SKECHERS
STRUCTUBE
BOMBAY
Running Room LTD.
Spring
ALDO
mattress mattress INC.
Hockey Life prohockeylife.com
MOUNTAIN EQUIPMENT CO-OP MEC
CAMPERS VILLAGE
Cabela's CANADA
daniadown HOME
IKEA
GOLF TOWN
SPORTCHEK

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RETAIL
Market & Gap Analysis

City of Grande Prairie

APPENDICES

CUSHING TERRELL ARCHITECTURE INC.

keyfax market research

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A APPENDIX | RETAIL INVENTORY

Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (SF)
Auto Canada	100th Street West Side	CENTRAL	Auto/RV/Motorsports Dealership	2,350
Tres Chic Hair Design	214 Place	CENTRAL	Health & Beauty	1,000
Escape Bistro Wine Bar	215 Place	CENTRAL	Full Service F&B	1,500
Mother Nurture Unique Baby	Downtown	CENTRAL	Specialty Retail	750
Art & Soul Hair Studio	Downtown - 100th Ave	CENTRAL	Personal Services	750
Imperial Garden Collectibles	Downtown - 100th Ave	CENTRAL	Specialty Retail	1,500
Jeweled	Downtown - 100th Ave	CENTRAL	Jewelry & Accessories	500
Wild Side T-Shirt Factory	Downtown - 100th Ave	CENTRAL	Clothing & Apparel	1,000
The Look Hair Design	Downtown - 100th St	CENTRAL	Personal Services	750
Your Time Hair Design	Downtown - 101 & 100th	CENTRAL	Personal Services	1,000
Factory Hair Studio	Downtown - 101 Ave	CENTRAL	Personal Services	750
Creative Illusions Hair	Downtown - 101 Executive Place	CENTRAL	Health & Beauty	750
Edward Jones	Downtown - 101 Executive Place	CENTRAL	Personal Services	1,000
Essentially You Weight Loss & Wellness	Downtown - 101 Executive Place	CENTRAL	Personal Services	1,000
Jenn Tina's Hair Design	Downtown - 101 Executive Place	CENTRAL	Health & Beauty	1,000
New York Salon & Spa	Downtown - 101 Executive Place	CENTRAL	Health & Beauty	1,250
Richmond Dry Cleaners	Downtown - 101 Executive Place	CENTRAL	Personal Services	1,500
Tito's Mediterranean & Western Cuisine	Downtown - 101 Executive Place	CENTRAL	Full Service F&B	1,500
The Colorbox	Downtown - 102 St	CENTRAL	Personal Services	750
7/11	Downtown - 97th Ave	CENTRAL	Grocery & Specialty Foods	2,000
Bad Ass Jacks	Downtown - 97th Ave (100th St Station)	CENTRAL	Limited Service F&B	1,200
Panago Pizza	Downtown - 97th Ave (100th St Station)	CENTRAL	Limited Service F&B	1,200
Towne Centre Laundry	Downtown - 97th Ave (100th St Station)	CENTRAL	Personal Services	2,500
VACANT	Downtown - 97th Ave (100th St Station)	CENTRAL	**VACANT**	1,200
Simply Vines	Downtown - Crystal Square	CENTRAL	Alcohol & Tobacco	1,200
Farmer's Market	Downtown - Freestanding	CENTRAL	Grocery & Specialty Foods	12,500
Golden Star Chinese Restaurant	Downtown - Freestanding	CENTRAL	Full Service F&B	7,000
Jeffrey's Café Co	Downtown - Freestanding	CENTRAL	Limited Service F&B	2,000
Medicinne Shoppe Pharmacy	Downtown - Hospital	CENTRAL	Pharmacy	1,000
VACANT (was Hollywood Video)	Downtown - south of 100th St	CENTRAL	**VACANT**	3,600
Wally's Kitchen	Downtown - south of 100th St	CENTRAL	Limited Service F&B	1,800
Wally's Laundromat	Downtown - south of 100th St	CENTRAL	Personal Services	1,200
Wally's Mini Mart	Downtown - south of 100th St	CENTRAL	Grocery & Specialty Foods	2,500
Cash Factory	Downtown - Tuscan Square	CENTRAL	Personal Services	750
Esquires (was Bean Counters)	Downtown - Tuscan Square	CENTRAL	Limited Service F&B	1,000
HJ's Bowling	Downtown - Tuscan Square	CENTRAL	Entertainment & Leisure	9,000
Planet Beach	Downtown - Tuscan Square	CENTRAL	Personal Services	1,000
Uniglobe Travel	Downtown - Tuscan Square	CENTRAL	Personal Services	1,000
Curves (RELOCATED)	Downtown Core - 97th Ave	CENTRAL	Health & Beauty	4,000
Haircraft	Downtown Core - 97th Ave	CENTRAL	Personal Services	750
Liquor For Less	Downtown Core - 97th Ave	CENTRAL	Alcohol & Tobacco	3,100
Long & McQuade	Downtown Core - 97th Ave	CENTRAL	Specialty Retail	10,500
Menzies Printers	Downtown Core - 97th Ave	CENTRAL	Specialty Retail	4,000
Pita Pit	Downtown Core - 97th Ave	CENTRAL	Limited Service F&B	1,000
Pizza Plus & Donair	Downtown Core - 97th Ave	CENTRAL	Limited Service F&B	1,000
Quiznos	Downtown Core - 97th Ave	CENTRAL	Limited Service F&B	1,500
Statix Hair Skin & Nails	Downtown Core - 97th Ave	CENTRAL	Health & Beauty	1,000
VACANT	Downtown Core - 97th Ave	CENTRAL	**VACANT**	750
Money Mart	Downtown Core - 97th Ave (Safri Centre)	CENTRAL	Personal Services	750
Royal Lepage	Downtown Core - 97th Ave (Safri Centre)	CENTRAL	Personal Services	2,000
Taj Grill & Bar	Downtown Core - 97th Ave (Safri Centre)	CENTRAL	Full Service F&B	2,500
Twisters Pizza (was Busters Pizza)	Downtown Core - 97th Ave (Safri Centre)	CENTRAL	Limited Service F&B	750
Bar One	Downtown Core - 99th Ave	CENTRAL	Entertainment & Leisure	2,500
Better than Freds Billiards	Downtown Core - 99th Ave	CENTRAL	Entertainment & Leisure	9,000
Crouses Cleaners	Downtown Core - 99th Ave	CENTRAL	Personal Services	2,500
Denny's	Downtown Core - 99th Ave	CENTRAL	Full Service F&B	3,500
Earl's Kitchen & Bar	Downtown Core - 99th Ave	CENTRAL	Full Service F&B	6,500
Force Comics	Downtown Core - 99th Ave	CENTRAL	Toys & Hobbies	1,000
Nolan Shoe Repair	Downtown Core - 99th Ave	CENTRAL	Personal Services	500
Servus Credit Union	Downtown Core - 99th Ave	CENTRAL	Personal Services	7,000
Shark Club	Downtown Core - 99th Ave	CENTRAL	Full Service F&B	8,500
Wendy's	Downtown Core - 99th Ave	CENTRAL	Limited Service F&B	2,600

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Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (SF)
Forever Young	Downtown Core - 99th Ave (Crystal Square)	CENTRAL	Personal Services	1,250
Homesteader Health	Downtown Core - 99th Ave (Crystal Square)	CENTRAL	Health & Beauty	2,500
Pizza 73	Downtown Core - 99th Ave (Crystal Square)	CENTRAL	Limited Service F&B	1,250
Speedy Cash	Downtown Core - 99th Ave (Crystal Square)	CENTRAL	Personal Services	1,250
Subway	Downtown Core - 99th Ave (Crystal Square)	CENTRAL	Limited Service F&B	2,500
Citi Financial	Downtown Core - 99th Ave (TowneCentre)	CENTRAL	Personal Services	1,500
Convenience	Downtown Core - 99th Ave (TowneCentre)	CENTRAL	Grocery & Specialty Foods	600
Grande Prairie Pet Shop	Downtown Core - 99th Ave (TowneCentre)	CENTRAL	Specialty Retail	2,300
Liquor Store	Downtown Core - 99th Ave (TowneCentre)	CENTRAL	Alcohol & Tobacco	1,000
Mah's Family Restaurant	Downtown Core - 99th Ave (TowneCentre)	CENTRAL	Full Service F&B	2,500
She Mann's Styling	Downtown Core - 99th Ave (TowneCentre)	CENTRAL	Health & Beauty	750
Towne Centre Furniture	Downtown Core - 99th Ave (TowneCentre)	CENTRAL	Home Furnishings & Accessories	16,000
VACANT (was Diamond City Jewelers)	Downtown Core - 99th Ave (TowneCentre)	CENTRAL	**VACANT**	1,250
Affordable Elegance	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Clothing & Apparel	1,750
After Hours Love	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	750
Alberta Computers	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Home Electronics & Appliances	5,000
Alberta Trophy	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	1,250
All the Rage Tattoo	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	1,000
Al's News	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	1,000
Avenue Crafts & Gifts	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	750
Babylon Tower Restaurant	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Full Service F&B	2,000
Bama Furniture	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Home Furnishings & Accessories	14,000
Bed Shoppe	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Home Furnishings & Accessories	7,500
Bello Stylez (was Barbershop)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Health & Beauty	1,000
Breakers Sports Lounge	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Entertainment & Leisure	3,000
Cards Board Game Café	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Limited Service F&B	1,000
Cash Canada Pawn	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	5,000
Central Barbershop	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Health & Beauty	1,000
CIBC	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	4,000
Claude's Watch Repair	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	500
Comic Shop	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Books & Multi-Media	1,000
Marketplace	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Grocery & Specialty Foods	33,000
Coyote Moon Hemp	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Clothing & Apparel	750
Cree8ive Ink Tattoo	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	750
Curry's Jewelers	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Jewelry & Accessories	1,000
Dark Flavor Apparel	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Clothing & Apparel	750
Difi Loft Boutique	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Clothing & Apparel	1,000
Disturbing the Peace Tattoo	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	500
Dluxe Womens Apparel - RELOCATED	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Clothing & Apparel	1,500
Edible Arrangements	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Grocery & Specialty Foods	2,500
Elite Home	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Home Furnishings & Accessories	1,500
Eternity Jewelry	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Jewelry & Accessories	750
Fashionista	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Clothing & Apparel	1,750
Focus Bookeeping (was Braids & Beauty)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	750
Forbes & Friends	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	1,000
GP Hobbies & Gifts (was Pawn Shop)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Toys & Hobbies	1,000
Grande Prairie Coffee (was Computer Guy)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Limited Service F&B	750
Hangar 19	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Clothing & Apparel	2,500
Heart of the Peace Gourmet Foods	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Grocery & Specialty Foods	1,000
Heiho Dojo	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	1,500
Hi Tech Business Systems	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	11,000
Homesteader Health (relocated from RioCan)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	1,750
Horn of Africa	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	1,250
House of Spades Boutique (was Toner One)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Clothing & Apparel	1,000
Imperial Garden Restaurant	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Full Service F&B	2,500
Just Beauty	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Health & Beauty	1,250
Laurel's Preserves	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	1,250
Linda's Hair Studio	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Health & Beauty	750
Marlin Travel	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	1,250
Midwest Appliances	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Home Electronics & Appliances	13,300
Milano for Men	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Clothing & Apparel	2,700
Mood Mender	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Jewelry & Accessories	1,000
Moondance Shining (was Rabbit Hole Books)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	1,250
Mrs B's Drapery	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Home Furnishings & Accessories	1,000

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Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (SF)
No Need to Knock Apparel	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Clothing & Apparel	1,250
Northern Lights Indoor Garden Centre	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Home Improvement & Gardening	1,000
One Fish Two Fish Restaurant	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Full Service F&B	3,000
Peace Halal Market	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Grocery & Specialty Foods	1,000
Picture Perfect Framing	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Home Furnishings & Accessories	2,000
Pink Rain Hair	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Health & Beauty	750
Prairie Cash Pawn	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	750
Primitive Lane Country Store	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	2,500
Promotional Product	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	1,000
Propeller & Co (relocated from Prairie Plaza)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Home Furnishings & Accessories	3,800
Pure Home	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Home Furnishings & Accessories	1,250
Pure Home (was Vak Shak Vacuums)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Home Furnishings & Accessories	2,000
Ramona's Pizza	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Limited Service F&B	750
Real Deals (was Wild Side T-Shirt Factory)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Clothing & Apparel	1,500
Real Deals Specialty Accessories	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	1,500
Re-Runs Clothing (was Monica's Barber Shop)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Clothing & Apparel	750
Retro Relics	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	500
Runaway Pieces (RELOCATED)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	750
Scotch & Soda Salon	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	1,500
Scotiabank	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	5,100
Sheperds Fold Books	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Books & Multi-Media	2,000
Simple Temptations	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	1,500
Skelly's Web Tattoos	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	1,000
Sky Nails	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Health & Beauty	1,000
Snapshot Studio	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	1,000
Soho Hair Lounge	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Health & Beauty	1,250
Sole Addiction Shoes	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Footwear	2,000
Source Adult	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	1,000
Sportswear Plus	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Clothing & Apparel	4,800
Staples Business Interiors	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	2,000
Styles & Smiles	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	750
T Sedore Photography	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Home Electronics & Appliances	750
Tangled Bobbin (was Vacation Store)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	1,000
Toni's Gluten Free Foods	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Grocery & Specialty Foods	500
VACANT	Downtown Core - Richmond Ave/100th Ave	CENTRAL	**VACANT**	750
VACANT (was Cinema)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	**VACANT**	13,750
VACANT (was Expressions In Bloom)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	**VACANT**	2,500
VACANT (was Long & McQuade)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	**VACANT**	2,000
VACANT (was Powder Room)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	**VACANT**	1,000
VACANT (was White Orchid Bridal)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	**VACANT**	1,250
Victoria's Attic	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Clothing & Apparel	1,250
Walk Run & More	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Footwear	2,000
Wonderland Toy & Hobby	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Toys & Hobbies	2,000
Always Hair	Downtown Core (Montrose)	CENTRAL	Personal Services	750
Esquires (Montrose)	Downtown Core (Montrose)	CENTRAL	Limited Service F&B	1,250
Indigo Jewelry	Freestanding	CENTRAL	Jewelry & Accessories	1,000
Sawmill Restaurant (was Mingles on Main)	Freestanding	CENTRAL	Full Service F&B	10,000
Custum Telus Cellular	Freestanding 100th St (west side)	CENTRAL	Specialty Retail	2,400
Music Centre	Freestanding 100th St (west side)	CENTRAL	Specialty Retail	2,500
Tim Hortons	Freestanding 100th St (west side)	CENTRAL	Limited Service F&B	2,800
RBC	Junction Point Village	CENTRAL	Personal Services	13,000
Tanslez Tanning	Junction Point Village	CENTRAL	Personal Services	1,000
Vanity Instant Salon	Junction Point Village	CENTRAL	Health & Beauty	2,500
Vine Luxury Spa	Junction Point Village	CENTRAL	Personal Services	2,000
Don's Dining	Station 97	CENTRAL	Limited Service F&B	2,000

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Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (SF)
Coffee Crave Café (was Esquires Coffee)	92nd St & 100th Ave (NE Corner)	EAST	Limited Service F&B	1,500
East Star Chinese	92nd St & 100th Ave (NE Corner)	EAST	Full Service F&B	1,500
Fabutan	92nd St & 100th Ave (NE Corner)	EAST	Personal Services	1,000
Liquor Depot	92nd St & 100th Ave (NE Corner)	EAST	Alcohol & Tobacco	2,000
Pizza Experts	92nd St & 100th Ave (NE Corner)	EAST	Limited Service F&B	1,000
Subway	92nd St & 100th Ave (NE Corner)	EAST	Limited Service F&B	1,500
VACANT (was Diamond Scissors)	92nd St & 100th Ave (NE Corner)	EAST	**VACANT**	1,250
Liquor Depot	92nd St & 92nd Ave NEW	EAST	Alcohol & Tobacco	1,500
Mac's Convenience	92nd St & 92nd Ave NEW	EAST	Grocery & Specialty Foods	2,500
Tim Hortons	92nd St & 92nd Ave NEW	EAST	Limited Service F&B	2,000
UNDER CONSTRUCTION	92nd St & 92nd Ave NEW	EAST	Limited Service F&B	2,000
Mac's Convenience	96th St & 100th Ave	EAST	Grocery & Specialty Foods	2,500
Aurora Eye Care	Cobblestone Lane 92nd St & 100th Ave	EAST	Personal Services	3,000
Liquor Depot	Cobblestone Lane 92nd St & 100th Ave	EAST	Alcohol & Tobacco	2,500
M&M Meat Shops	Cobblestone Lane 92nd St & 100th Ave	EAST	Grocery & Specialty Foods	1,000
Mary Brown's Chicken	Cobblestone Lane 92nd St & 100th Ave	EAST	Limited Service F&B	1,000
Oriental Wok	Cobblestone Lane 92nd St & 100th Ave	EAST	Limited Service F&B	1,000
Peppermint Twist Hair & Design	Cobblestone Lane 92nd St & 100th Ave	EAST	Health & Beauty	1,000
Shoppers Drug Mart	Cobblestone Lane 92nd St & 100th Ave	EAST	Pharmacy	15,000
Snap Fitness	Cobblestone Lane 92nd St & 100th Ave	EAST	Entertainment & Leisure	5,000
Starbucks	Cobblestone Lane 92nd St & 100th Ave	EAST	Limited Service F&B	2,000
TD Bank	Cobblestone Lane 92nd St & 100th Ave	EAST	Personal Services	3,500
Animal First Clinic	Crystal Lake 92nd St & 116th Ave	EAST	Personal Services	1,750
Ciao Bella Spa	Crystal Lake 92nd St & 116th Ave	EAST	Health & Beauty	1,000
Crystal Spirits	Crystal Lake 92nd St & 116th Ave	EAST	Alcohol & Tobacco	1,000
Europa Deli	Crystal Lake 92nd St & 116th Ave	EAST	Grocery & Specialty Foods	1,000
Good To Grow	Crystal Lake 92nd St & 116th Ave	EAST	Specialty Retail	1,000
Winks Beer	Crystal Lake 92nd St & 116th Ave	EAST	Alcohol & Tobacco	2,000
Eastside Grocery	Hillside 94th St & 100th Ave	EAST	Grocery & Specialty Foods	1,500
Eastside Kitchen	Hillside 94th St & 100th Ave	EAST	Full Service F&B	1,500
Eastside Liquor	Hillside 94th St & 100th Ave	EAST	Alcohol & Tobacco	1,000
VACANT	Hillside 94th St & 100th Ave	EAST	**VACANT**	1,500
Mac's Convenience	Lakeland Plaza 91st St & 132nd Ave	EAST	Grocery & Specialty Foods	1,250
Papa Murphy's	Lakeland Plaza 91st St & 132nd Ave	EAST	Limited Service F&B	1,000
Royal Spirits	Lakeland Plaza 91st St & 132nd Ave	EAST	Alcohol & Tobacco	1,250
Subway	Lakeland Plaza 91st St & 132nd Ave	EAST	Limited Service F&B	1,000
Winks Mountainview Groceries	Mountainview 95th St & 108th Ave	EAST	Grocery & Specialty Foods	2,300

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Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (SF)
Doug Marshall Chevrolet Cadillac	100th Street	NORTH	Auto/RV/Motorsports Dealership	30,000
Driving Force Vehicle Rentals/Sales/Leasing	100th Street	NORTH	Auto/RV/Motorsports Dealership	4,500
Ken Sargent Buick GMC Pontiac	100th Street	NORTH	Auto/RV/Motorsports Dealership	27,000
McGoverns RV & Marine	100th Street	NORTH	Auto/RV/Motorsports Dealership	7,500
Nor-lan Chrysler Dodge Jeep RAM	100th Street	NORTH	Auto/RV/Motorsports Dealership	16,500
Nor-lan Used Centre	100th Street	NORTH	Auto/RV/Motorsports Dealership	12,000
Northgate Honda New & Used	100th Street	NORTH	Auto/RV/Motorsports Dealership	21,500
Redline Powercraft	100th Street	NORTH	Auto/RV/Motorsports Dealership	10,000
Revolution Mazda (was Grande Prairie Mazda)	100th Street	NORTH	Auto/RV/Motorsports Dealership	13,400
Western RV Country	100th Street	NORTH	Auto/RV/Motorsports Dealership	7,500
Windsor Ford	100th Street	NORTH	Auto/RV/Motorsports Dealership	17,700
Windsor Motorsports	100th Street	NORTH	Auto/RV/Motorsports Dealership	6,700
Woody's RV World	100th Street	NORTH	Auto/RV/Motorsports Dealership	23,500
A2Zee Kitchen (relocated from Save on Foods)	113th Ave near Canadian Tire	NORTH	Home Furnishings & Accessories	1,000
Continental Fine Shoes (was Watsons Photo)	Bell Tower Plaza	NORTH	Footwear	2,000
Dons Menswear	Bell Tower Plaza	NORTH	Clothing & Apparel	2,000
Growers Direct Flowers	Bell Tower Plaza	NORTH	Personal Services	1,500
Lynns Alterations	Bell Tower Plaza	NORTH	Personal Services	1,200
Northern Gold & Diamonds	Bell Tower Plaza	NORTH	Jewelry & Accessories	1,500
Parties & Wishes Unlimited	Bell Tower Plaza	NORTH	Specialty Retail	1,200
Royal Beauty Supplies	Bell Tower Plaza	NORTH	Health & Beauty	1,200
Skyline Micro Systems	Bell Tower Plaza	NORTH	Home Electronics & Appliances	2,000
UPS Store	Bell Tower Plaza	NORTH	Specialty Retail	1,200
Urban Lengths Salon	Bell Tower Plaza	NORTH	Health & Beauty	1,500
Grande Prairie Nissan	Bypass	NORTH	Auto/RV/Motorsports Dealership	12,200
Sean Sargent Toyota	Bypass	NORTH	Auto/RV/Motorsports Dealership	20,700
ATB Financial	Canadian Tire Plaza (east side of 99th St)	NORTH	Personal Services	5,600
Canadian Tire **(Potentially relocating)**	Canadian Tire Plaza (east side of 99th St)	NORTH	Auto Parts & Accessories	40,000
Canadian Tire **(Potentially relocating)**	Canadian Tire Plaza (east side of 99th St)	NORTH	Books & Multi-Media	0
Canadian Tire **(Potentially relocating)**	Canadian Tire Plaza (east side of 99th St)	NORTH	Clothing & Apparel	1,000
Canadian Tire **(Potentially relocating)**	Canadian Tire Plaza (east side of 99th St)	NORTH	Footwear	500
Canadian Tire **(Potentially relocating)**	Canadian Tire Plaza (east side of 99th St)	NORTH	Grocery & Specialty Foods	500
Canadian Tire **(Potentially relocating)**	Canadian Tire Plaza (east side of 99th St)	NORTH	Health & Beauty	0
Canadian Tire **(Potentially relocating)**	Canadian Tire Plaza (east side of 99th St)	NORTH	Home Electronics & Appliances	2,000
Canadian Tire **(Potentially relocating)**	Canadian Tire Plaza (east side of 99th St)	NORTH	Home Furnishings & Accessories	5,000
Canadian Tire **(Potentially relocating)**	Canadian Tire Plaza (east side of 99th St)	NORTH	Home Improvement & Gardening	20,000
Canadian Tire **(Potentially relocating)**	Canadian Tire Plaza (east side of 99th St)	NORTH	Jewelry & Accessories	0
Canadian Tire **(Potentially relocating)**	Canadian Tire Plaza (east side of 99th St)	NORTH	Limited Service F&B	0
Canadian Tire **(Potentially relocating)**	Canadian Tire Plaza (east side of 99th St)	NORTH	Personal Services	0
Canadian Tire **(Potentially relocating)**	Canadian Tire Plaza (east side of 99th St)	NORTH	Pharmacy	0
Canadian Tire **(Potentially relocating)**	Canadian Tire Plaza (east side of 99th St)	NORTH	Specialty Retail	5,000
Canadian Tire **(Potentially relocating)**	Canadian Tire Plaza (east side of 99th St)	NORTH	Sporting Goods & Outdoor Recreation	16,000
Canadian Tire **(Potentially relocating)**	Canadian Tire Plaza (east side of 99th St)	NORTH	Toys & Hobbies	10,000
IGA Freson Bros	Canadian Tire Plaza (east side of 99th St)	NORTH	Grocery & Specialty Foods	35,000
Value Village	Canadian Tire Plaza (east side of 99th St)	NORTH	Clothing & Apparel	18,750
Beach Bumz Tanning	Centre 100 Plaza	NORTH	Personal Services	1,000
Cloverdale Paint	Centre 100 Plaza	NORTH	Home Improvement & Gardening	2,000
Dollarama	Centre 100 Plaza	NORTH	Specialty Retail	12,000
Easy Home	Centre 100 Plaza	NORTH	Home Furnishings & Accessories	3,000
Giant Tiger	Centre 100 Plaza	NORTH	Grocery & Specialty Foods	21,000
Herbal One (was Herbal Magic)	Centre 100 Plaza	NORTH	Specialty Retail	1,000
Investors Group	Centre 100 Plaza	NORTH	Personal Services	2,000
Live 2 Play (was XS Cargo)	Centre 100 Plaza	NORTH	Entertainment & Leisure	10,000
Pet Value	Centre 100 Plaza	NORTH	Specialty Retail	3,400
Solo Liquor	Centre 100 Plaza	NORTH	Alcohol & Tobacco	6,000
Stitch n Dance	Centre 100 Plaza	NORTH	Clothing & Apparel	750
Toyz Emporium	Centre 100 Plaza	NORTH	Toys & Hobbies	1,500
VACANT	Centre 100 Plaza	NORTH	**VACANT**	1,750
VACANT (was Insta Loans)	Centre 100 Plaza	NORTH	**VACANT**	500
Ernie's Fitness Experts	Ernie's Plaza	NORTH	Sporting Goods & Outdoor Recreation	17,300
Ernie's Sports Experts	Ernie's Plaza	NORTH	Sporting Goods & Outdoor Recreation	32,200

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Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (SF)
A&W	Freestanding	NORTH	Limited Service F&B	3,400
Action Car & Truck (was Custom Truck Parts)	Freestanding	NORTH	Auto Parts & Accessories	15,000
Airways Truck Rental	Freestanding	NORTH	Auto/RV/Motorsports Dealership	3,500
Amish Furniture Home & Health	Freestanding	NORTH	Home Furnishings & Accessories	1,500
Arby's	Freestanding	NORTH	Limited Service F&B	3,400
Beachcomber Hot Tubs	Freestanding	NORTH	Home Improvement & Gardening	8,000
Boston Pizza	Freestanding	NORTH	Full Service F&B	7,000
Culligan Water	Freestanding	NORTH	Specialty Retail	1,500
Edwards Factory Outlet	Freestanding	NORTH	Clothing & Apparel	8,000
Enterprise Car Rental	Freestanding	NORTH	Auto/RV/Motorsports Dealership	1,500
Fountain Tire	Freestanding	NORTH	Auto Parts & Accessories	12,000
Humpty's Family Restaurant	Freestanding	NORTH	Full Service F&B	2,000
Kal Tire	Freestanding	NORTH	Auto Parts & Accessories	5,000
Keddie's Tack & Western Wear	Freestanding	NORTH	Specialty Retail	14,000
Lube City Oil	Freestanding	NORTH	Auto Parts & Accessories	3,200
Mama Panda Buffet	Freestanding	NORTH	Full Service F&B	3,500
Money Stop	Freestanding	NORTH	Personal Services	750
Motley Que Barbeque	Freestanding	NORTH	Home Improvement & Gardening	2,500
Nu Floors Outlet	Freestanding	NORTH	Home Improvement & Gardening	3,000
Pat's Auto Parts	Freestanding	NORTH	Auto Parts & Accessories	10,000
Pho One (was Local's Public House)	Freestanding	NORTH	Full Service F&B	2,000
Real Canadian Superstore	Freestanding	NORTH	Auto Parts & Accessories	0
Real Canadian Superstore	Freestanding	NORTH	Books & Multi-Media	3,000
Real Canadian Superstore	Freestanding	NORTH	Clothing & Apparel	26,000
Real Canadian Superstore	Freestanding	NORTH	Footwear	2,000
Real Canadian Superstore	Freestanding	NORTH	Grocery & Specialty Foods	50,000
Real Canadian Superstore	Freestanding	NORTH	Health & Beauty	3,000
Real Canadian Superstore	Freestanding	NORTH	Home Electronics & Appliances	5,000
Real Canadian Superstore	Freestanding	NORTH	Home Furnishings & Accessories	10,000
Real Canadian Superstore	Freestanding	NORTH	Home Improvement & Gardening	8,000
Real Canadian Superstore	Freestanding	NORTH	Jewelry & Accessories	5,000
Real Canadian Superstore	Freestanding	NORTH	Limited Service F&B	1,000
Real Canadian Superstore	Freestanding	NORTH	Personal Services	3,000
Real Canadian Superstore	Freestanding	NORTH	Pharmacy	5,000
Real Canadian Superstore	Freestanding	NORTH	Specialty Retail	3,000
Real Canadian Superstore	Freestanding	NORTH	Sporting Goods & Outdoor Recreation	3,000
Real Canadian Superstore	Freestanding	NORTH	Toys & Hobbies	3,000
Real Canadian Superstore Liquor	Freestanding	NORTH	Alcohol & Tobacco	7,000
Sapphire Health	Freestanding	NORTH	Personal Services	2,000
Tirecraft Auto	Freestanding	NORTH	Auto Parts & Accessories	5,500
Tracey's Treasures	Freestanding	NORTH	Specialty Retail	2,000
United Furniture & Brick Clearance	Freestanding	NORTH	Home Furnishings & Accessories	22,500
Wendy's	Freestanding	NORTH	Limited Service F&B	3,000
Benjamin Moore	Freestanding (100th St north of 116th west)	NORTH	Home Improvement & Gardening	2,500
Cap-It	Freestanding (100th St north of 116th west)	NORTH	Auto Parts & Accessories	5,000
Pizza Hut	Freestanding (100th St north of 116th west)	NORTH	Full Service F&B	4,000
Fourward Sports	Freestanding 100th St (east side)	NORTH	Sporting Goods & Outdoor Recreation	6,000
Home Hardware	Freestanding 100th St (east side)	NORTH	Home Improvement & Gardening	20,000
DNI Cleaning Supplies	Freestanding beside Nu Floors	NORTH	Home Improvement & Gardening	2,000
Basics Hair Care	KFC Plaza 100th St (east side)	NORTH	Health & Beauty	1,000
Cooperators	KFC Plaza 100th St (east side)	NORTH	Personal Services	1,000
Haberman Properties	KFC Plaza 100th St (east side)	NORTH	Personal Services	1,000
Hong Kong House Chinese	KFC Plaza 100th St (east side)	NORTH	Full Service F&B	1,500
HR Block	KFC Plaza 100th St (east side)	NORTH	Personal Services	1,000
KFC	KFC Plaza 100th St (east side)	NORTH	Limited Service F&B	2,300
OMG Cupcakes	KFC Plaza 100th St (east side)	NORTH	Limited Service F&B	750
Optometrist	KFC Plaza 100th St (east side)	NORTH	Personal Services	1,000
Smokers Corner	KFC Plaza 100th St (east side)	NORTH	Alcohol & Tobacco	1,000
Always Invited Pet Salon	Miscellaneous 100th St (west side)	NORTH	Specialty Retail	1,000
Carpet One	Miscellaneous 100th St (west side)	NORTH	Home Furnishings & Accessories	5,000
Dairy Queen	Miscellaneous 100th St (west side)	NORTH	Limited Service F&B	3,000
Evening Shade Tatoo	Miscellaneous 100th St (west side)	NORTH	Personal Services	1,000
Grande Prairie Upholstery	Miscellaneous 100th St (west side)	NORTH	Home Furnishings & Accessories	1,000
Mac's Convenience	Miscellaneous 100th St (west side)	NORTH	Grocery & Specialty Foods	2,500
Quality Vacuum	Miscellaneous 100th St (west side)	NORTH	Home Improvement & Gardening	2,000
Radical Streetwear	Miscellaneous 100th St (west side)	NORTH	Clothing & Apparel	2,000
Sun Capsule Health & Fitness	Miscellaneous 100th St (west side)	NORTH	Entertainment & Leisure	5,000
Unida Christian Church	Miscellaneous 100th St (west side)	NORTH	Personal Services	1,000

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Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (SF)
Creative Treasures Framing	Northridge Business Centre	NORTH	Home Furnishings & Accessories	750
ECO Kitchen Accessories	Northridge Business Centre	NORTH	Home Furnishings & Accessories	1,000
Edward Jones	Northridge Business Centre	NORTH	Personal Services	1,500
Beer Wine & Liquor (Pomeroy Hotel)	Northridge Business Park	NORTH	Alcohol & Tobacco	3,000
Bliss Salon & Spa	Northridge Business Park	NORTH	Health & Beauty	4,000
City Furniture	Northridge Business Park	NORTH	Home Furnishings & Accessories	20,000
Fine Line Carpets	Northridge Business Park	NORTH	Home Furnishings & Accessories	8,000
Hearth & Home	Northridge Business Park	NORTH	Home Furnishings & Accessories	2,000
Little Caesars	Northridge Business Park	NORTH	Limited Service F&B	1,000
McDonalds	Northridge Business Park	NORTH	Limited Service F&B	4,000
Mr. Mikes	Northridge Business Park	NORTH	Full Service F&B	8,000
Prairie Sushi	Northridge Business Park	NORTH	Full Service F&B	4,000
Servus Credit Union	Northridge Business Park	NORTH	Personal Services	4,000
Subway	Northridge Business Park	NORTH	Limited Service F&B	1,500
Taco Time	Northridge Business Park	NORTH	Limited Service F&B	1,500
Tim Hortons	Northridge Business Park	NORTH	Limited Service F&B	3,000
Trumps VLT Lounge & Liquor Store	Northridge Business Park	NORTH	Alcohol & Tobacco	10,000
Pho House	Oak Ridge Business Centre (NEW)	NORTH	Full Service F&B	2,198
A&W	Prairie Mall	NORTH	Limited Service F&B	389
Action Sportswear	Prairie Mall	NORTH	Clothing & Apparel	4,900
Aeropostale	Prairie Mall	NORTH	Clothing & Apparel	3,476
Alia n Tan Jay	Prairie Mall	NORTH	Clothing & Apparel	2,257
Ardene	Prairie Mall	NORTH	Jewelry & Accessories	4,903
Bath & Body Works	Prairie Mall	NORTH	Health & Beauty	2,923
Bell	Prairie Mall	NORTH	Specialty Retail	1,229
Ben Moss	Prairie Mall	NORTH	Jewelry & Accessories	893
Bentley	Prairie Mall	NORTH	Specialty Retail	1,545
Boathouse	Prairie Mall	NORTH	Clothing & Apparel	5,146
Body Shop	Prairie Mall	NORTH	Health & Beauty	635
Bootlegger	Prairie Mall	NORTH	Clothing & Apparel	4,162
Chatters	Prairie Mall	NORTH	Health & Beauty	2,844
Children's Place	Prairie Mall	NORTH	Clothing & Apparel	4,443
Claire's	Prairie Mall	NORTH	Jewelry & Accessories	1,021
Coles	Prairie Mall	NORTH	Books & Multi-Media	3,436
Culture	Prairie Mall	NORTH	Jewelry & Accessories	1,015
David's Tea	Prairie Mall	NORTH	Limited Service F&B	832
Dollarama (was Buck or Two)	Prairie Mall	NORTH	Specialty Retail	1,006
Eastlink	Prairie Mall	NORTH	Specialty Retail	200
EDO	Prairie Mall	NORTH	Limited Service F&B	385
Extreme	Prairie Mall	NORTH	Clothing & Apparel	2,178
Flight Centre	Prairie Mall	NORTH	Personal Services	735
Foot Locker	Prairie Mall	NORTH	Footwear	2,411
Fusion	Prairie Mall	NORTH	Clothing & Apparel	1,740
Garage	Prairie Mall	NORTH	Clothing & Apparel	3,603
Hallmark	Prairie Mall	NORTH	Specialty Retail	1,932
Health Hut	Prairie Mall	NORTH	Health & Beauty	1,263
HMV	Prairie Mall	NORTH	Books & Multi-Media	2,443
Hyba	Prairie Mall	NORTH	Clothing & Apparel	2,602
Jenny's (was Smart Set)	Prairie Mall	NORTH	Clothing & Apparel	1,907
Jersey City	Prairie Mall	NORTH	Sporting Goods & Outdoor Recreation	1,507
Jonathon's Gold & Diamonds	Prairie Mall	NORTH	Jewelry & Accessories	882
Jugo Juice	Prairie Mall	NORTH	Limited Service F&B	200
Koodoo	Prairie Mall	NORTH	Specialty Retail	200
La Senza	Prairie Mall	NORTH	Clothing & Apparel	3,031
Le Chateau	Prairie Mall	NORTH	Clothing & Apparel	4,904
Leather Plus	Prairie Mall	NORTH	Clothing & Apparel	1,473
M5 Jean Service	Prairie Mall	NORTH	Clothing & Apparel	3,780
Manhandler Barber Shop	Prairie Mall	NORTH	Health & Beauty	1,100
Manhattan Clothing	Prairie Mall	NORTH	Clothing & Apparel	2,563
Mark's Workwearhouse	Prairie Mall	NORTH	Clothing & Apparel	5,827
Michael Hill Jewelers	Prairie Mall	NORTH	Jewelry & Accessories	988
Mobilinq (was Murdawg)	Prairie Mall	NORTH	Home Electronics & Appliances	638
Moxie's Classic Grill	Prairie Mall	NORTH	Full Service F&B	6,233
New York Fries	Prairie Mall	NORTH	Limited Service F&B	270
Nolan's Shoe Repair	Prairie Mall	NORTH	Personal Services	430
OPA	Prairie Mall	NORTH	Limited Service F&B	436
Optik 1000	Prairie Mall	NORTH	Personal Services	1,642
Orange Julius	Prairie Mall	NORTH	Limited Service F&B	402
Paris Jewelers	Prairie Mall	NORTH	Jewelry & Accessories	1,426
People's Jewelers	Prairie Mall	NORTH	Jewelry & Accessories	2,048
Prairie Mall Dental	Prairie Mall	NORTH	Personal Services	2,295
Quilts Etc	Prairie Mall	NORTH	Specialty Retail	1,951
Ricky's	Prairie Mall	NORTH	Clothing & Apparel	4,463
Rocky Mountain Chocolate Factory	Prairie Mall	NORTH	Limited Service F&B	313
Rogers	Prairie Mall	NORTH	Specialty Retail	689

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Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (SF)
RW & Co	Prairie Mall	NORTH	Clothing & Apparel	4,225
Sheffield & Son	Prairie Mall	NORTH	Specialty Retail	319
Shoe Warehouse	Prairie Mall	NORTH	Footwear	3,032
Shoppers Drug Mart	Prairie Mall	NORTH	Pharmacy	14,844
Showcase	Prairie Mall	NORTH	Specialty Retail	1,518
Sizzling Wok	Prairie Mall	NORTH	Limited Service F&B	394
Soft Moc	Prairie Mall	NORTH	Footwear	2,564
Source	Prairie Mall	NORTH	Home Electronics & Appliances	2,136
Spare Parts	Prairie Mall	NORTH	Jewelry & Accessories	1,332
Spencer's Gifts	Prairie Mall	NORTH	Specialty Retail	1,496
Stitches	Prairie Mall	NORTH	Clothing & Apparel	3,923
Stokes	Prairie Mall	NORTH	Home Furnishings & Accessories	1,546
Subway	Prairie Mall	NORTH	Limited Service F&B	387
Suzy Shier	Prairie Mall	NORTH	Clothing & Apparel	2,722
T&T Nails	Prairie Mall	NORTH	Personal Services	806
Taco Time	Prairie Mall	NORTH	Limited Service F&B	394
Telus	Prairie Mall	NORTH	Specialty Retail	1,059
Things Engraved	Prairie Mall	NORTH	Jewelry & Accessories	200
Tim Hortons (was Sams Sushi)	Prairie Mall	NORTH	Limited Service F&B	388
Tommy Gun's (was Master Cuts)	Prairie Mall	NORTH	Health & Beauty	1,464
Urban Trail	Prairie Mall	NORTH	Footwear	1,296
VACANT 188	Prairie Mall	NORTH	**VACANT**	1,263
VACANT 295	Prairie Mall	NORTH	**VACANT**	430
VACANT 296	Prairie Mall	NORTH	**VACANT**	350
VACANT 172 (was Irv's Shoes)	Prairie Mall	NORTH	**VACANT**	1,770
VACANT 218 (was Motherhood Maternity)	Prairie Mall	NORTH	**VACANT**	1,761
VACANT 278 (was Sterling Shoes)	Prairie Mall	NORTH	**VACANT**	982
VACANT 100 (was Target)	Prairie Mall	NORTH	**VACANT**	112,591
Virgin Mobile	Prairie Mall	NORTH	Specialty Retail	200
Wireless Wave	Prairie Mall	NORTH	Specialty Retail	180
Bob's Electronic Repairs	Prairie Plaza	NORTH	Home Electronics & Appliances	1,000
Bright Beginning Child Care	Prairie Plaza	NORTH	Personal Services	3,000
Curio (was Caprice Fashion)	Prairie Plaza	NORTH	Clothing & Apparel	2,000
Denon Home Theatre	Prairie Plaza	NORTH	Home Electronics & Appliances	6,000
Flaman Fitness	Prairie Plaza	NORTH	Entertainment & Leisure	3,000
Hernami Goldsmith & Jewelry	Prairie Plaza	NORTH	Jewelry & Accessories	1,250
Kettles & Company (Kitchen & Bath)	Prairie Plaza	NORTH	Home Furnishings & Accessories	1,500
Klassica (was Romance 101)	Prairie Plaza	NORTH	Specialty Retail	2,000
Monarch Cabinets (was Calistas Bridal)	Prairie Plaza	NORTH	Home Improvement & Gardening	2,000
Orthodontics North (was NDHC Dental)	Prairie Plaza	NORTH	Personal Services	2,500
Plaza Dental	Prairie Plaza	NORTH	Personal Services	2,000
Soul Remedies (was Fresh Pedispa)	Prairie Plaza	NORTH	Health & Beauty	1,500
Strange Ideas Comics & Collectibles	Prairie Plaza	NORTH	Specialty Retail	1,500
Warehouse One Jeans	Prairie Plaza	NORTH	Clothing & Apparel	3,000
Centre Stage Dance Wear	Prairie Plaza North	NORTH	Personal Services	1,000
Create a Portrait	Prairie Plaza North	NORTH	Personal Services	1,500
FYIdoctors	Prairie Plaza North	NORTH	Personal Services	8,000
Watsons Photo Source	Prairie Plaza North	NORTH	Home Electronics & Appliances	1,500
Reliant Travel	Royal Oak (NEW)	NORTH	Personal Services	1,000
Joey's Seafood	Royal Oak Strip Centre	NORTH	Full Service F&B	2,500
Marble Slab Creamery	Royal Oak Strip Centre	NORTH	Limited Service F&B	1,000
Marcy's Flower Boutique	Royal Oak Strip Centre	NORTH	Specialty Retail	1,000
Northern Blooms	Royal Oak Strip Centre	NORTH	Specialty Retail	750
Royal Spirits	Royal Oak Strip Centre	NORTH	Alcohol & Tobacco	1,500
Tennesee Jack's Chicken & Ribs	Royal Oak Strip Centre	NORTH	Limited Service F&B	1,500
WA Sushi	Royal Oak Strip Centre	NORTH	Limited Service F&B	1,000

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Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (SF)
Carpet Superstores	Royal Oaks	NORTH	Home Furnishings & Accessories	5,000
General Paint	Royal Oaks	NORTH	Home Improvement & Gardening	3,000
Global Pet Foods	Royal Oaks	NORTH	Specialty Retail	3,000
Hong Fah Thai	Royal Oaks	NORTH	Limited Service F&B	2,000
Micro Computers Plus	Royal Oaks	NORTH	Home Electronics & Appliances	5,000
Tony Romas	Royal Oaks	NORTH	Full Service F&B	7,000
Ashley Furniture	Royal Oaks - Freestanding	NORTH	Home Furnishings & Accessories	20,000
Prestige Appliances	Royal Oaks - Freestanding	NORTH	Home Furnishings & Accessories	15,000
Padrino's (Best Western)	Royal Oaks Best Western Hotel	NORTH	Full Service F&B	3,000
Safeway & Safeway Liquor Store	Safeway Plaza	NORTH	Grocery & Specialty Foods	56,000
VACANT	Safeway Plaza	NORTH	**VACANT**	1,600
Beth's Books	Sears Centre	NORTH	Books & Multi-Media	2,000
Charlie's Girls Hair	Sears Centre	NORTH	Health & Beauty	1,000
Cotton Candy	Sears Centre	NORTH	Limited Service F&B	1,500
Harley Davidson	Sears Centre	NORTH	Auto Parts & Accessories	10,000
Ricky's Grill	Sears Centre	NORTH	Full Service F&B	5,000
Sears	Sears Centre	NORTH	Clothing & Apparel	105,483
VACANT (was Janina's Diamonds)	Sears Centre	NORTH	**VACANT**	4,000
Black Dalia Tattoo	Strip Centre (east side of 99th south of 116th)	NORTH	Personal Services	1,000
Comm Vest Realty	Strip Centre (east side of 99th south of 116th)	NORTH	Personal Services	1,000
Inkubus Tatoo	Strip Centre (east side of 99th south of 116th)	NORTH	Personal Services	750
Merle Norman	Strip Centre (east side of 99th south of 116th)	NORTH	Health & Beauty	1,250
Motivations Bridal Creations & Tailoring	Strip Centre (east side of 99th south of 116th)	NORTH	Personal Services	1,500
Nails n More	Strip Centre (east side of 99th south of 116th)	NORTH	Health & Beauty	750
Quaity Property Management	Strip Centre (east side of 99th south of 116th)	NORTH	Personal Services	1,000
Sculptures Design Nail Studio	Strip Centre (east side of 99th south of 116th)	NORTH	Health & Beauty	750
Stitch n Dance	Strip Centre (east side of 99th south of 116th)	NORTH	Specialty Retail	1,000
Vaccuum Shop (was Barry's Filipino)	Strip Centre (east side of 99th south of 116th)	NORTH	Home Electronics & Appliances	1,500
Vapor Hub	Strip Centre (east side of 99th south of 116th)	NORTH	Alcohol & Tobacco	750
Barry's Variety Store (was Lights Plus Décor)	Strip Centre (west side of 99th south of 116th)	NORTH	Grocery & Specialty Foods	3,500
Bartons Archery & Hunting	Strip Centre (west side of 99th south of 116th)	NORTH	Sporting Goods & Outdoor Recreation	5,300
Blackmans Butcher Shop	Strip Centre (west side of 99th south of 116th)	NORTH	Grocery & Specialty Foods	6,000
JNJ Cuisine Filipino Food	Strip Centre (west side of 99th south of 116th)	NORTH	Full Service F&B	3,500
Aarons Appliances	Strip Centre 100th St (east side)	NORTH	Home Furnishings & Accessories	7,000
Cash Canada	Strip Centre 100th St (east side)	NORTH	Personal Services	2,000
Echo Video Unlimited	Strip Centre 100th St (east side)	NORTH	Home Electronics & Appliances	3,000
Horangi TaeKwonDo	Strip Centre 100th St (east side)	NORTH	Personal Services	2,000
Lang Locksmiths	Strip Centre 100th St (east side)	NORTH	Personal Services	2,000
March Forth Army Surplus	Strip Centre 100th St (east side)	NORTH	Specialty Retail	2,500
Northern Heating & Fireplace	Strip Centre 100th St (east side)	NORTH	Home Improvement & Gardening	2,500
Partners Naturally Dog Shop	Strip Centre 100th St (east side)	NORTH	Specialty Retail	1,500
Tatoos Now	Strip Centre 100th St (east side)	NORTH	Personal Services	1,000
Chiklets Junior Salon &Spa	Strip Centre 100th St (west side)	NORTH	Health & Beauty	1,250
Extreme RC	Strip Centre 100th St (west side)	NORTH	Toys & Hobbies	750
Liquor Barn	Strip Centre 100th St (west side)	NORTH	Alcohol & Tobacco	4,000
Northern Spaces Living (was Peace Windows)	Strip Centre 100th St (west side)	NORTH	Home Furnishings & Accessories	4,200
Popeye's Supplements	Strip Centre 100th St (west side)	NORTH	Specialty Retail	1,500
Splatter Paintball	Strip Centre 100th St (west side)	NORTH	Entertainment & Leisure	1,000
Canopy West		NORTH	Auto Parts & Accessories	11,000
Liberty Tax Service		NORTH	Personal Services	1,000

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Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (SF)
Vintage Wine & Spirits	100th & 88th St	SOUTH	Alcohol & Tobacco	1,000
Mac's Convenience	68th Ave & O'Brien/Pine	SOUTH	Grocery & Specialty Foods	3,000
Fas Gas Short Stop	84th & 116th	SOUTH	Grocery & Specialty Foods	1,500
Cheeky Chic Boutique	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Clothing & Apparel	1,000
Country Club Animal Clinic	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Personal Services	2,000
Daddio's Pizzeria	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Limited Service F&B	1,000
Dairy Queen	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Limited Service F&B	2,000
Edward Jones	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Personal Services	1,000
Fabutan	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Personal Services	1,000
VACANT (was Grains Bakery)	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	**VACANT**	1,500
L'il Sprouts Pre-School	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Personal Services	750
Resistence (was Movie Town)	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Entertainment & Leisure	2,000
Royal Spirits (was Southgate Liquor)	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Alcohol & Tobacco	2,500
Shell Select	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Grocery & Specialty Foods	750
Southside Pharmacy	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Pharmacy	1,250
Strands Styling	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Health & Beauty	1,000
Tim Hortons	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Limited Service F&B	2,250
Ernie's Sports Experts	Eastlink Centre	SOUTH	Sporting Goods & Outdoor Recreation	1,500
Jugo Juice	Eastlink Centre	SOUTH	Limited Service F&B	300
Second Cup	Eastlink Centre	SOUTH	Limited Service F&B	300
El Surenos (replaced Wannawaffle)	Eastlink Centre	SOUTH	Limited Service F&B	300
Tito's Fresh Healthy Food	Eastlink Centre	SOUTH	Limited Service F&B	300
Liquor Locker	Freestanding Hwy 40 / 108th St (west side)	SOUTH	Alcohol & Tobacco	1,500
Shell Select	Freestanding Hwy 40 / 108th St (west side)	SOUTH	Grocery & Specialty Foods	2,500
LEASED	Grande Banks on 68th	SOUTH	**VACANT**	2,368
Orange Theory Fitness	Grande Banks on 68th	SOUTH	Entertainment & Leisure	6,500
VACANT	Grande Banks on 68th	SOUTH	**VACANT**	244
VACANT	Grande Banks on 68th	SOUTH	**VACANT**	4,391
VACANT	Grande Banks on 68th	SOUTH	**VACANT**	2,033
VACANT	Grande Banks on 68th	SOUTH	**VACANT**	1,978
VACANT (Restaurant Pad for Lease)	Grande Banks on 68th	SOUTH	**VACANT**	7,000
Grains Bakery Café	Grande Banks Stone Ridge	SOUTH	Limited Service F&B	2,500
Harvey's	Grande Banks Stone Ridge	SOUTH	Limited Service F&B	3,500
Red Rock Urban BBQ	Grande Banks Stone Ridge	SOUTH	Full Service F&B	2,000
Sangsters Organic Market	Grande Banks Stone Ridge	SOUTH	Grocery & Specialty Foods	1,000
ATB Financial	Mission Heights 68th Ave & Mission Heights	SOUTH	Personal Services	5,000
Bear Creek Liquor Centre	Mission Heights 68th Ave & Mission Heights	SOUTH	Alcohol & Tobacco	1,500
Booster Juice	Mission Heights 68th Ave & Mission Heights	SOUTH	Limited Service F&B	800
Head Room Salon	Mission Heights 68th Ave & Mission Heights	SOUTH	Health & Beauty	1,000
Joey's Urban Taqueria (was Mom Baby Child)	Mission Heights 68th Ave & Mission Heights	SOUTH	Full Service F&B	1,000
Menchies	Mission Heights 68th Ave & Mission Heights	SOUTH	Limited Service F&B	1,000
Snap Fitness	Mission Heights 68th Ave & Mission Heights	SOUTH	Entertainment & Leisure	3,000
Starbucks	Mission Heights 68th Ave & Mission Heights	SOUTH	Limited Service F&B	1,500
Subway	Mission Heights 68th Ave & Mission Heights	SOUTH	Limited Service F&B	1,000
Supplement King	Mission Heights 68th Ave & Mission Heights	SOUTH	Grocery & Specialty Foods	800
Pizza73	Mission Heights 68th Ave & Mission Heights	SOUTH	Limited Service F&B	1,000
The Headroom Salon	Mission Heights 68th Ave & Mission Heights	SOUTH	Personal Services	1,000
VACANT	Mission Heights 68th Ave & Mission Heights	SOUTH	**VACANT**	1,000
VACANT (was Up Along Fish n Chips)	Mission Heights 68th Ave & Mission Heights	SOUTH	**VACANT**	1,000
Mac's Convenience	Mission Heights Crossing	SOUTH	Grocery & Specialty Foods	1,500
VACANT	Mission Heights Crossing	SOUTH	**VACANT**	1,500

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Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (SF)
Light Works Aesthetics	Patterson Mall 84th Ave & Patterson Dr	SOUTH	Personal Services	1,000
Liquor Depot	Patterson Mall 84th Ave & Patterson Dr	SOUTH	Alcohol & Tobacco	5,500
Mac's Convenience	Patterson Mall 84th Ave & Patterson Dr	SOUTH	Grocery & Specialty Foods	2,000
Pizza Hut/Wing Street	Patterson Mall 84th Ave & Patterson Dr	SOUTH	Limited Service F&B	2,500
Shoppers Home Health Care	Patterson Mall 84th Ave & Patterson Dr	SOUTH	Pharmacy	8,000
VACANT (was Eservus)	Patterson Mall 84th Ave & Patterson Dr	SOUTH	**VACANT**	6,000
Liquor Barn	Resource Plaza 76th Ave & Resource Rd	SOUTH	Alcohol & Tobacco	4,000
Mac's Convenience	Resource Plaza 76th Ave & Resource Rd	SOUTH	Grocery & Specialty Foods	3,000
Anytime Fitness NEW	South 40 84th & Hwy 40 / 108th St	SOUTH	Entertainment & Leisure	5,000
Bell	South 40 84th & Hwy 40 / 108th St	SOUTH	Specialty Retail	750
Carls Jr	South 40 84th & Hwy 40 / 108th St	SOUTH	Limited Service F&B	3,500
Cheap Smokes	South 40 84th & Hwy 40 / 108th St	SOUTH	Alcohol & Tobacco	750
Cora's	South 40 84th & Hwy 40 / 108th St	SOUTH	Full Service F&B	2,000
EDO	South 40 84th & Hwy 40 / 108th St	SOUTH	Limited Service F&B	1,000
Servus Credit Union	South 40 84th & Hwy 40 / 108th St	SOUTH	Personal Services	3,500
Europa Meat Shop	South 40 84th & Hwy 40 / 108th St	SOUTH	Grocery & Specialty Foods	1,000
Famoso Pizza	South 40 84th & Hwy 40 / 108th St	SOUTH	Limited Service F&B	1,500
Gear Fitness & Nutrition	South 40 84th & Hwy 40 / 108th St	SOUTH	Specialty Retail	1,000
McDonalds	South 40 84th & Hwy 40 / 108th St	SOUTH	Limited Service F&B	5,000
Memphis Blues NEW	South 40 84th & Hwy 40 / 108th St	SOUTH	Limited Service F&B	1,200
No Frills	South 40 84th & Hwy 40 / 108th St	SOUTH	Grocery & Specialty Foods	30,000
Original Joes	South 40 84th & Hwy 40 / 108th St	SOUTH	Full Service F&B	3,000
Papa Murphy's	South 40 84th & Hwy 40 / 108th St	SOUTH	Limited Service F&B	1,000
Pet Valu NEW	South 40 84th & Hwy 40 / 108th St	SOUTH	Specialty Retail	2,500
Press'd Sandwich NEW	South 40 84th & Hwy 40 / 108th St	SOUTH	Limited Service F&B	1,200
Quizno's	South 40 84th & Hwy 40 / 108th St	SOUTH	Limited Service F&B	1,000
RBC	South 40 84th & Hwy 40 / 108th St	SOUTH	Personal Services	5,000
Real Canadian Liquorstore	South 40 84th & Hwy 40 / 108th St	SOUTH	Alcohol & Tobacco	4,000
Second Cup	South 40 84th & Hwy 40 / 108th St	SOUTH	Limited Service F&B	1,250
Shoppers Drug Mart	South 40 84th & Hwy 40 / 108th St	SOUTH	Pharmacy	17,000
Sky Nails & Spa NEW	South 40 84th & Hwy 40 / 108th St	SOUTH	Personal Services	1,458
South 40 Dental	South 40 84th & Hwy 40 / 108th St	SOUTH	Personal Services	3,000
Subway NEW	South 40 84th & Hwy 40 / 108th St	SOUTH	Limited Service F&B	1,500
Tim Hortons	South 40 84th & Hwy 40 / 108th St	SOUTH	Limited Service F&B	3,500
Tip Top Barbershop	South 40 84th & Hwy 40 / 108th St	SOUTH	Health & Beauty	750
VACANT	South 40 84th & Hwy 40 / 108th St	SOUTH	**VACANT**	1,200
VACANT	South 40 84th & Hwy 40 / 108th St	SOUTH	**VACANT**	1,200
VACANT	South 40 84th & Hwy 40 / 108th St	SOUTH	**VACANT**	1,200
VACANT	South 40 84th & Hwy 40 / 108th St	SOUTH	**VACANT**	1,900
VACANT	South 40 84th & Hwy 40 / 108th St	SOUTH	**VACANT**	1,900
VACANT	South 40 84th & Hwy 40 / 108th St	SOUTH	**VACANT**	1,630
VACANT	South 40 84th & Hwy 40 / 108th St	SOUTH	**VACANT**	1,120
Yogarty's Frozen Yogurt NEW	South 40 84th & Hwy 40 / 108th St	SOUTH	Limited Service F&B	1,458
Cat B Lou Styling	Southview 84th Ave & 100th St	SOUTH	Health & Beauty	1,000
Crown & Anchor Pub	Southview 84th Ave & 100th St	SOUTH	Entertainment & Leisure	8,000
Hair T's	Southview 84th Ave & 100th St	SOUTH	Personal Services	1,000
IGA Fresons	Southview 84th Ave & 100th St	SOUTH	Grocery & Specialty Foods	34,000
LA Heat & Tanning	Southview 84th Ave & 100th St	SOUTH	Personal Services	2,000
Liquor Depot	Southview 84th Ave & 100th St	SOUTH	Alcohol & Tobacco	4,000
Papa John's	Southview 84th Ave & 100th St	SOUTH	Limited Service F&B	2,000
Safeway	Southview 84th Ave & 100th St	SOUTH	Grocery & Specialty Foods	45,000
State & Main Kitchen (was Blockbuster)	Southview 84th Ave & 100th St	SOUTH	Full Service F&B	5,000
VACANT	Southview 84th Ave & 100th St	SOUTH	**VACANT**	1,700
VACANT (was Great Canadian Dollar Store)	Southview 84th Ave & 100th St	SOUTH	**VACANT**	6,000
Grande Prairie Wine & Spirits	Westpoint @ 84th	SOUTH	Alcohol & Tobacco	2,000
Short Stop Fas Gas	Westpoint @ 84th	SOUTH	Grocery & Specialty Foods	1,000

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Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (SF)
Grande Prairie Brewing Co (NEW)	100th Ave	WEST	Alcohol & Tobacco	5,000
Jimmy's Liquor	100th Ave	WEST	Alcohol & Tobacco	2,000
Season of Forty @ Holiday Inn	100th Ave	WEST	Full Service F&B	2,500
Volkswagen	108th Street	WEST	Auto/RV/Motorsports Dealership	9,800
A&W	Brochu Industrial	WEST	Limited Service F&B	3,000
Grande Prairie Convenience (Petro Canada)	Brochu Industrial	WEST	Grocery & Specialty Foods	2,500
COSTCO	Centre West Business Park	WEST	Auto Parts & Accessories	15,000
COSTCO	Centre West Business Park	WEST	Books & Multi-Media	625
COSTCO	Centre West Business Park	WEST	Clothing & Apparel	3,750
COSTCO	Centre West Business Park	WEST	Footwear	0
COSTCO	Centre West Business Park	WEST	Grocery & Specialty Foods	83,750
COSTCO	Centre West Business Park	WEST	Health & Beauty	1,250
COSTCO	Centre West Business Park	WEST	Home Electronics & Appliances	7,500
COSTCO	Centre West Business Park	WEST	Home Furnishings & Accessories	2,500
COSTCO	Centre West Business Park	WEST	Home Improvement & Gardening	2,500
COSTCO	Centre West Business Park	WEST	Jewelry & Accessories	313
COSTCO	Centre West Business Park	WEST	Limited Service F&B	938
COSTCO	Centre West Business Park	WEST	Personal Services	1,563
COSTCO	Centre West Business Park	WEST	Pharmacy	1,563
COSTCO	Centre West Business Park	WEST	Specialty Retail	1,250
COSTCO	Centre West Business Park	WEST	Sporting Goods & Outdoor Recreation	1,250
COSTCO	Centre West Business Park	WEST	Toys & Hobbies	1,250
Monica's Restaurant (Stafford Inn)	Centre West Business Park	WEST	Full Service F&B	5,000
Domino's Pizza	College Park 100th Ave & 106th St	WEST	Limited Service F&B	2,500
Keg Steakhouse	College Park 100th Ave & 106th St	WEST	Full Service F&B	5,500
KFC	College Park 100th Ave & 106th St	WEST	Limited Service F&B	2,500
Liquor Plus	College Park 100th Ave & 106th St	WEST	Alcohol & Tobacco	1,500
Parkside Convenience Store	College Park 100th Ave & 106th St	WEST	Grocery & Specialty Foods	1,500
Tim Hortons	College Park 100th Ave & 106th St	WEST	Limited Service F&B	2,800
A&W	Freestanding	WEST	Limited Service F&B	3,000
Bowling Stones 10 Pin Bowling	Freestanding	WEST	Entertainment & Leisure	10,000
Den Carvery (was Zone Sports Grill)	Freestanding	WEST	Full Service F&B	6,000
Great Northern Casino	Freestanding	WEST	Entertainment & Leisure	20,000
Home Hardware	Freestanding	WEST	Home Improvement & Gardening	25,000
McDonalds	Freestanding	WEST	Limited Service F&B	3,000
The Grande Bingo	Freestanding	WEST	Entertainment & Leisure	15,000
VACANT (was Peavy Mart)	Freestanding	WEST	**VACANT**	16,000
Wendy's (Coming Soon)	Freestanding	WEST	Limited Service F&B	3,000
Whiskey House Liquor Store	Freestanding	WEST	Alcohol & Tobacco	1,500
Jax Grill	Industrial 97th Ave & 112 St	WEST	Full Service F&B	4,500
NAPA Auto Parts	Industrial 97th Ave & 112 St	WEST	Auto Parts & Accessories	4,000
SOS Safety Supplies	Industrial 97th Ave & 112 St	WEST	Specialty Retail	2,000
Humpty's	NEW	WEST	Full Service F&B	2,000
Mint Health & Drugs	NEW	WEST	Pharmacy	2,000

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Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (SF)
Best Buy	Power Centre	WEST	Home Electronics & Appliances	25,800
Polite Society Clothing Co. (was Bombshell)	Power Centre	WEST	Clothing & Apparel	1,000
Burger Heaven	Power Centre	WEST	Limited Service F&B	1,500
CIBC	Power Centre	WEST	Personal Services	7,300
EDO Japanese	Power Centre	WEST	Limited Service F&B	750
Fusion Cup	Power Centre	WEST	Limited Service F&B	1,000
GNC	Power Centre	WEST	Specialty Retail	1,000
Intersport	Power Centre	WEST	Sporting Goods & Outdoor Recreation	8,000
Marks WorkWearhouse	Power Centre	WEST	Clothing & Apparel	20,508
Mucho Burrito	Power Centre	WEST	Limited Service F&B	1,000
OPA Greek	Power Centre	WEST	Limited Service F&B	1,000
PetSmart	Power Centre	WEST	Specialty Retail	12,063
S3 Skate Snow Surf	Power Centre	WEST	Sporting Goods & Outdoor Recreation	8,000
Sally Beauty	Power Centre	WEST	Health & Beauty	1,000
Scotiabank	Power Centre	WEST	Personal Services	8,000
Subway	Power Centre	WEST	Limited Service F&B	1,000
Tommy Gunn's Barber Shop	Power Centre	WEST	Health & Beauty	1,000
U Weight Loss Clinic	Power Centre	WEST	Health & Beauty	1,000
VACANT (was Future Shop)	Power Centre	WEST	**VACANT**	25,440
Addition Elle	RioCan Grande Prairie	WEST	Clothing & Apparel	4,000
Alpine Water	RioCan Grande Prairie	WEST	Specialty Retail	1,000
Believe Fit Active Lifestyle	RioCan Grande Prairie	WEST	Clothing & Apparel	2,500
Burger King	RioCan Grande Prairie	WEST	Limited Service F&B	3,500
Burrito Zone/Pizza Depot	RioCan Grande Prairie	WEST	Limited Service F&B	1,000
Canada Post	RioCan Grande Prairie	WEST	Personal Services	2,000
Canadian Brewhouse	RioCan Grande Prairie	WEST	Full Service F&B	10,000
Castaspello Boutique	RioCan Grande Prairie	WEST	Clothing & Apparel	1,500
Chopped Leaf Salads	RioCan Grande Prairie	WEST	Limited Service F&B	1,000
Cineplex Odeon	RioCan Grande Prairie	WEST	Entertainment & Leisure	75,000
Coin Laundry	RioCan Grande Prairie	WEST	Personal Services	1,050
Dollarama	RioCan Grande Prairie	WEST	Specialty Retail	10,000
Easy Financial	RioCan Grande Prairie	WEST	Personal Services	1,000
EB Games	RioCan Grande Prairie	WEST	Home Electronics & Appliances	1,000
Euphoria Paradise	RioCan Grande Prairie	WEST	Personal Services	1,200
Goodwill Centre	RioCan Grande Prairie	WEST	Specialty Retail	1,000
Great Clips	RioCan Grande Prairie	WEST	Health & Beauty	1,000
Husky Corner Store	RioCan Grande Prairie	WEST	Grocery & Specialty Foods	1,000
Jenny Craig	RioCan Grande Prairie	WEST	Personal Services	1,000
JYSK	RioCan Grande Prairie	WEST	Home Furnishings & Accessories	12,000
LA Heat Tanning	RioCan Grande Prairie	WEST	Personal Services	1,500
Liquor Barn	RioCan Grande Prairie	WEST	Alcohol & Tobacco	2,500

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Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (SF)
London Drugs	RioCan Grande Prairie	WEST	Auto Parts & Accessories	200
London Drugs	RioCan Grande Prairie	WEST	Books & Multi-Media	1000
London Drugs	RioCan Grande Prairie	WEST	Clothing & Apparel	500
London Drugs	RioCan Grande Prairie	WEST	Footwear	0
London Drugs	RioCan Grande Prairie	WEST	Grocery & Specialty Foods	2000
London Drugs	RioCan Grande Prairie	WEST	Health & Beauty	3600
London Drugs	RioCan Grande Prairie	WEST	Home Electronics & Appliances	4000
London Drugs	RioCan Grande Prairie	WEST	Home Furnishings & Accessories	2000
London Drugs	RioCan Grande Prairie	WEST	Home Improvement & Gardening	0
London Drugs	RioCan Grande Prairie	WEST	Jewelry & Accessories	0
London Drugs	RioCan Grande Prairie	WEST	Limited Service F&B	0
London Drugs	RioCan Grande Prairie	WEST	Personal Services	0
London Drugs	RioCan Grande Prairie	WEST	Pharmacy	5000
London Drugs	RioCan Grande Prairie	WEST	Specialty Retail	1000
London Drugs	RioCan Grande Prairie	WEST	Sporting Goods & Outdoor Recreation	200
London Drugs	RioCan Grande Prairie	WEST	Toys & Hobbies	500
Love Boutique	RioCan Grande Prairie	WEST	Clothing & Apparel	750
M&M Meat Shops	RioCan Grande Prairie	WEST	Grocery & Specialty Foods	750
Mary Brown's Chicken (was Mr Sub)	RioCan Grande Prairie	WEST	Limited Service F&B	750
Michaels Crafts	RioCan Grande Prairie	WEST	Specialty Retail	10,000
Money Mart	RioCan Grande Prairie	WEST	Specialty Retail	750
Payless Shoes	RioCan Grande Prairie	WEST	Footwear	2,000
Penningtons	RioCan Grande Prairie	WEST	Clothing & Apparel	4,000
Petland	RioCan Grande Prairie	WEST	Specialty Retail	10,000
Prairie Gold Jewelry	RioCan Grande Prairie	WEST	Jewelry & Accessories	2,500
Q Nails	RioCan Grande Prairie	WEST	Personal Services	1,000
Reitmans	RioCan Grande Prairie	WEST	Clothing & Apparel	8,000
Rogers	RioCan Grande Prairie	WEST	Specialty Retail	750
RONA	RioCan Grande Prairie	WEST	Home Improvement & Gardening	50,000
Smitty's	RioCan Grande Prairie	WEST	Full Service F&B	8,000
SOJO Sushi	RioCan Grande Prairie	WEST	Limited Service F&B	2,000
Staples	RioCan Grande Prairie	WEST	Specialty Retail	17,000
Starbucks	RioCan Grande Prairie	WEST	Limited Service F&B	2,500
Sticky's Candy	RioCan Grande Prairie	WEST	Grocery & Specialty Foods	1,000
Swiss Chalet	RioCan Grande Prairie	WEST	Full Service F&B	5,000
Thyme Maternity	RioCan Grande Prairie	WEST	Clothing & Apparel	2,000
Tokyo Ichiban	RioCan Grande Prairie	WEST	Limited Service F&B	3,000
VACANT	RioCan Grande Prairie	WEST	**VACANT**	1,000
VACANT	RioCan Grande Prairie	WEST	**VACANT**	1,500
VACANT (was Lululemon Outlet)	RioCan Grande Prairie	WEST	**VACANT**	2,000
WalMart	RioCan Grande Prairie	WEST	Auto Parts & Accessories	15,000
WalMart	RioCan Grande Prairie	WEST	Books & Multi-Media	2,000
WalMart	RioCan Grande Prairie	WEST	Clothing & Apparel	50,000
WalMart	RioCan Grande Prairie	WEST	Footwear	3,000
WalMart	RioCan Grande Prairie	WEST	Grocery & Specialty Foods	50,000
WalMart	RioCan Grande Prairie	WEST	Health & Beauty	5,000
WalMart	RioCan Grande Prairie	WEST	Home Electronics & Appliances	15,000
WalMart	RioCan Grande Prairie	WEST	Home Furnishings & Accessories	15,000
WalMart	RioCan Grande Prairie	WEST	Home Improvement & Gardening	10,000
WalMart	RioCan Grande Prairie	WEST	Jewelry & Accessories	2,500
WalMart	RioCan Grande Prairie	WEST	Limited Service F&B	3,000
WalMart	RioCan Grande Prairie	WEST	Personal Services	2,000
WalMart	RioCan Grande Prairie	WEST	Pharmacy	5,000
WalMart	RioCan Grande Prairie	WEST	Specialty Retail	12,500
WalMart	RioCan Grande Prairie	WEST	Sporting Goods & Outdoor Recreation	5,000
WalMart	RioCan Grande Prairie	WEST	Toys & Hobbies	5,000
Wholesale Sports	RioCan Grande Prairie	WEST	Sporting Goods & Outdoor Recreation	20,000
Winners	RioCan Grande Prairie	WEST	Clothing & Apparel	20,000
Wok Box	RioCan Grande Prairie	WEST	Limited Service F&B	1,000

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Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (SF)
Booster Juice	Save On Foods Plaza	WEST	Limited Service F&B	750
Fabricland	Save On Foods Plaza	WEST	Specialty Retail	10,000
Fatburger	Save On Foods Plaza	WEST	Limited Service F&B	2,500
Firecrust Pizza	Save On Foods Plaza	WEST	Limited Service F&B	1,250
Liquor Depot	Save On Foods Plaza	WEST	Alcohol & Tobacco	2,500
Pita Pit	Save On Foods Plaza	WEST	Limited Service F&B	750
Quizno's	Save On Foods Plaza	WEST	Limited Service F&B	1,000
Save On Foods	Save On Foods Plaza	WEST	Grocery & Specialty Foods	40,000
Subway	Save On Foods Plaza	WEST	Limited Service F&B	1,000
Telus	Save On Foods Plaza	WEST	Specialty Retail	1,000
Your Dollar Store	Save On Foods Plaza	WEST	Specialty Retail	6,000
CIL Dulux Paint	Vision West Business Park	WEST	Home Improvement & Gardening	2,500
Countryside Motorsports	Vision West Business Park	WEST	Auto/RV/Motorsports Dealership	25,000
Dulux Paint	Vision West Business Park	WEST	Home Improvement & Gardening	1,500
Grande Granite	Vision West Business Park	WEST	Home Improvement & Gardening	1,500
Grande Prairie KIA	Vision West Business Park	WEST	Auto/RV/Motorsports Dealership	10,000
LUXE Home Furniture	Vision West Business Park	WEST	Home Furnishings & Accessories	5,000
Peavey Mart	Vision West Business Park	WEST	Home Improvement & Gardening	16,800
Princess Auto	Vision West Business Park	WEST	Auto Parts & Accessories	15,000
Visions Electronics	Vision West Business Park	WEST	Home Electronics & Appliances	15,000
Bed Bath & Beyond	Westgate Centre	WEST	Home Furnishings & Accessories	17,000
Bone n Biscuit	Westgate Centre	WEST	Specialty Retail	1,000
Brown's Social House	Westgate Centre	WEST	Full Service F&B	3,000
Bulk Barn	Westgate Centre	WEST	Specialty Retail	5,000
Carters Osh Kosk	Westgate Centre	WEST	Clothing & Apparel	1,750
Dental	Westgate Centre	WEST	Personal Services	2,000
Dollar Tree	Westgate Centre	WEST	Specialty Retail	8,000
Gap Factory Outlet	Westgate Centre	WEST	Clothing & Apparel	6,500
Harvey's	Westgate Centre	WEST	Limited Service F&B	2,000
Home Sense	Westgate Centre	WEST	Home Furnishings & Accessories	20,000
Janina's Jewelers (relocated from Sears Centre)	Westgate Centre	WEST	Jewelry & Accessories	3,000
Justice	Westgate Centre	WEST	Clothing & Apparel	5,500
La Vie en Rose	Westgate Centre	WEST	Clothing & Apparel	5,300
Liquor Depot	Westgate Centre	WEST	Alcohol & Tobacco	4,000
Master Cuts	Westgate Centre	WEST	Health & Beauty	750
Mastermind Toys	Westgate Centre	WEST	Toys & Hobbies	5,307
Monica Shoes (NEW)	Westgate Centre	WEST	Footwear	1,500
Moore's Clothing for Men	Westgate Centre	WEST	Clothing & Apparel	2,000
Old Navy	Westgate Centre	WEST	Clothing & Apparel	13,500
Party City	Westgate Centre	WEST	Specialty Retail	8,000
Pier 1 Imports	Westgate Centre	WEST	Home Furnishings & Accessories	8,000
Red Wing Shoes	Westgate Centre	WEST	Footwear	1,500
Shoe Company	Westgate Centre	WEST	Footwear	5,300
Sleep Country	Westgate Centre	WEST	Home Furnishings & Accessories	5,000
Source	Westgate Centre	WEST	Home Electronics & Appliances	1,750
Urban Barn	Westgate Centre	WEST	Home Furnishings & Accessories	5,500
VACANT	Westgate Centre	WEST	**VACANT**	3,784
VACANT	Westgate Centre	WEST	**VACANT**	1,202
VACANT	Westgate Centre	WEST	**VACANT**	1,202
VACANT	Westgate Centre	WEST	**VACANT**	1,202
VACANT	Westgate Centre	WEST	**VACANT**	2,000
VACANT	Westgate Centre	WEST	**VACANT**	2,000
Boston Pizza	Westgate Power Centre	WEST	Full Service F&B	7,659
Brick	Westgate Power Centre	WEST	Home Furnishings & Accessories	25,000
Canadian Western Bank	Westgate Power Centre	WEST	Personal Services	8,000
Five Guys Burgers & Fries	Westgate Power Centre	WEST	Limited Service F&B	2,000
Grande Prairie Chrysler Dodge Jeep RAM	Westgate Power Centre	WEST	Auto/RV/Motorsports Dealership	28,000
Grande Prairie Ford	Westgate Power Centre	WEST	Auto/RV/Motorsports Dealership	18,300
Grande Prairie Hyundai	Westgate Power Centre	WEST	Auto/RV/Motorsports Dealership	7,000
Grande Prairie Mitsubishi	Westgate Power Centre	WEST	Auto/RV/Motorsports Dealership	12,500
Grande Prairie Subaru	Westgate Power Centre	WEST	Auto/RV/Motorsports Dealership	12,500
Home Depot	Westgate Power Centre	WEST	Home Improvement & Gardening	100,000
Nevada Bobs	Westgate Power Centre	WEST	Sporting Goods & Outdoor Recreation	12,000
SOLO Liquor	Westgate Power Centre	WEST	Alcohol & Tobacco	4,000
ATB Financial	Westside Plaza	WEST	Personal Services	10,300
BMO	Westside Plaza	WEST	Personal Services	8,300
China Rise	Westside Plaza	WEST	Limited Service F&B	1,500
Esquires Coffee	Westside Plaza	WEST	Limited Service F&B	2,000
Guerino's Italian Kitchen	Westside Plaza	WEST	Full Service F&B	1,500
Jeffrey's Café	Westside Plaza	WEST	Limited Service F&B	1,500
Motion Fitness (was World Gym)	Westside Plaza	WEST	Entertainment & Leisure	25,000
Super Rice Bowls	Westside Plaza	WEST	Limited Service F&B	1,500
TD Bank	Westside Plaza	WEST	Personal Services	7,700
VACANT (was Township 71 & Ric's Grill)	Westside Plaza	WEST	**VACANT**	4,000
			TOTAL	**4,060,645**

B APPENDIX | CONSUMER SURVEY OPEN-ENDED RETAILER RESPONSES

Retailer / Tenant Type	Merchandise Category	Number of Responses
Auto Servicing	Auto Parts, Services & Accessories	3
Pick & Pull	Auto Parts, Services & Accessories	1
Snowmobile Dealership	Auto/RV/Motorsports	1
Chapters/Indigo Books	Books & Multi-Media	27
Parables Bookstore	Books & Multi-Media	1
Lululemon Athletica	Clothing & Apparel	23
Victoria's Secret	Clothing & Apparel	15
Forever 21	Clothing & Apparel	13
H&M	Clothing & Apparel	9
American Eagle	Clothing & Apparel	8
Guess	Clothing & Apparel	6
Marshall's	Clothing & Apparel	5
Sirens	Clothing & Apparel	4
Dynamite	Clothing & Apparel	3
Helly Hansen	Clothing & Apparel	3
Ivivva	Clothing & Apparel	2
Cleo	Clothing & Apparel	2
Tommy Hilfiger	Clothing & Apparel	2
Babies R Us	Clothing & Apparel	2
Zara's	Clothing & Apparel	2
Aritzia	Clothing & Apparel	1
Bench	Clothing & Apparel	1
Triple Flip	Clothing & Apparel	1
Carter's	Clothing & Apparel	1
Millennium	Clothing & Apparel	1
Zumiez	Clothing & Apparel	1
West 49	Clothing & Apparel	1
Big & Tall	Clothing & Apparel	1
Hugo Boss	Clothing & Apparel	1
Scotch & Soda	Clothing & Apparel	1
Lip Service	Clothing & Apparel	1
Laura's	Clothing & Apparel	1
Hot Topic	Clothing & Apparel	1
Loft	Clothing & Apparel	1

B

Retailer / Tenant Type	Merchandise Category	Number of Responses
Movie Theatre	Entertainment & Leisure	30
IMAX	Entertainment & Leisure	10
Miniature Golf	Entertainment & Leisure	9
Family Entertainment	Entertainment & Leisure	5
Indoor Roller Rink	Entertainment & Leisure	5
24 Hour Gym	Entertainment & Leisure	5
Go Carts / Bumper Cars	Entertainment & Leisure	5
Water Park/Slides	Entertainment & Leisure	4
Live Music Club	Entertainment & Leisure	4
Arcade & Game Room	Entertainment & Leisure	4
Live Theatre	Entertainment & Leisure	3
Indoor Amusement Park	Entertainment & Leisure	3
Live Concerts	Entertainment & Leisure	3
Parks	Entertainment & Leisure	2
Adult Dance Hall	Entertainment & Leisure	2
Street Festivals	Entertainment & Leisure	2
Bingo Hall	Entertainment & Leisure	1
Pool - Adults	Entertainment & Leisure	1
Aldo	Footwear	14
Spring	Footwear	11
Nike	Footwear	1
Running Room	Footwear	1

B

Retailer / Tenant Type	Merchandise Category	Number of Responses
Red Lobster	Full Service F&B	70
Olive Garden	Full Service F&B	61
Montana's Cookhouse	Full Service F&B	33
Chili's	Full Service F&B	20
Old Spaghetti Factory	Full Service F&B	10
Cactus Clus	Full Service F&B	9
Family Friendly Restaurant	Full Service F&B	7
Red Robin	Full Service F&B	5
White Spot	Full Service F&B	5
Cheesecake Factory	Full Service F&B	4
Jungle Jim's	Full Service F&B	4
Chuck E Cheese	Full Service F&B	3
IHOP	Full Service F&B	3
Outback Steakhouse	Full Service F&B	2
Milestone's	Full Service F&B	2
A Brewhouse	Full Service F&B	2
Applebee's	Full Service F&B	1
Medieval Times	Full Service F&B	1
The Coupe	Full Service F&B	1
Tilted Kilt Pub	Full Service F&B	1
The Pint	Full Service F&B	1
Joey Tomatos	Full Service F&B	1
1st Round	Full Service F&B	1
The Bay	General Merchandise	11
Costco (Another)	General Merchandise	2
Army & Navy	General Merchandise	1
T&T Supermarket	Grocery & Specialty Foods	3
Sobey's	Grocery & Specialty Foods	1
Trade Joe's	Grocery & Specialty Foods	1

B

Retailer / Tenant Type	Merchandise Category	Number of Responses
Sephora	Health & Beauty	8
MAC	Health & Beauty	7
Lush	Health & Beauty	4
Saje	Health & Beauty	1
Apple Store	Home Electronics & Appliances	9
IKEA	Home Furnishings & Accessories	32
Lee Valley Tools	Home Improvement & Gardening	1
Michael Hill	Jewelry & Accessories	1
Charming Charlie	Jewelry & Accessories	1
Ethnic (Chinese, Thai, Filipino, Indian)	Limited Service F&B	24
Taco Bell	Limited Service F&B	8
Local Owned Cafés	Limited Service F&B	4
Taco del Mar	Limited Service F&B	3
More Starbucks	Limited Service F&B	3
Mongolian Grill	Limited Service F&B	2
Hot Spot	Limited Service F&B	2
Nando's Chicken	Limited Service F&B	1
Jack Astor's	Limited Service F&B	1
Pizza Delight	Limited Service F&B	1
Ooodles Noodles	Limited Service F&B	1
The Melting Pot	Limited Service F&B	1
Sorrentino's	Limited Service F&B	1
Cinnabon	Limited Service F&B	1
Grandma Lee's	Limited Service F&B	1

B

Retailer / Tenant Type	Merchandise Category	Number of Responses
Hair & Beauty Salon	Personal Services	7
Childcare	Personal Services	4
Aveda Salon	Personal Services	1
More Doctors	Professional Services	30
More Dentists	Professional Services	1
Spay & Neuter Facility	Professional Services	1
Musical Instruments	Specialty Retail	2
Art's Desire	Specialty Retail	2
Office Depot	Specialty Retail	2
Kinkos	Specialty Retail	1
Lammle's Western Wear & Tack	Specialty Retail	1
Sport Chek	Sporting Goods & Outdoor Recreation	24
Cabela's	Sporting Goods & Outdoor Recreation	17
Mountain Equipment Coop MEC	Sporting Goods & Outdoor Recreation	5
Bass Pro	Sporting Goods & Outdoor Recreation	5
Sport Mart	Sporting Goods & Outdoor Recreation	1
Toys R Us	Toys & Hobbies	22

Y2013 VS Y2016 GRANDE PRAIRIE CONSUMER SURVEY RESULTS

INTERVIEW LOCATION * YEAR Crosstabulation

			YEAR		Total
			Y2013	Y2016	
INTERVIEW LOCATION	PRAIRIE MALL	Count	175	150	325
		% within YEAR	87.5%	75.0%	81.3%
	EASTLINK CENTRE	Count	0	50	50
		% within YEAR	0.0%	25.0%	12.5%
	214 PLACE	Count	25	0	25
		% within YEAR	12.5%	0.0%	6.3%
Total		Count	200	200	400
		% within YEAR	100.0%	100.0%	100.0%

CITY RESPONDENT RESIDES * YEAR Crosstabulation

			YEAR		Total
			Y2013	Y2016	
CITY RESPONDENT RESIDES	GRANDE PRAIRIE CITY	Count	118	130	248
		% within YEAR	59.0%	65.0%	62.0%
	GRANDE PRAIRIE COUNTY	Count	29	22	51
		% within YEAR	14.5%	11.0%	12.8%
	CLAIRMONT	Count	4	4	8
		% within YEAR	2.0%	2.0%	2.0%
	BEAVERLODGE	Count	5	7	12
		% within YEAR	2.5%	3.5%	3.0%
	SEXSMITH	Count	5	8	13
		% within YEAR	2.5%	4.0%	3.3%
	OTHER CITY	Count	39	29	68
		% within YEAR	19.5%	14.5%	17.0%
Total		Count	200	200	400
		% within YEAR	100.0%	100.0%	100.0%

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Y2013 VS Y2016 GRANDE PRAIRIE CONSUMER SURVEY RESULTS

Q1A. PRIMARY CONVENIENCE SHOPPING CENTER * YEAR Crosstabulation

			YEAR		
			Y2013	Y2016	Total
Q1A. PRIMARY CONVENIENCE SHOPPING CENTER	NO CONVENIENCE PRIMARY	Count	2	6	8
		% within YEAR	1.0%	3.0%	2.0%
	WAL MART GP	Count	16	15	31
		% within YEAR	8.0%	7.5%	7.8%
	RCSS GP	Count	40	58	98
		% within YEAR	20.0%	29.0%	24.5%
	COSTCO GP	Count	32	36	68
		% within YEAR	16.0%	18.0%	17.0%
	SAFEWAY GP S	Count	29	12	41
		% within YEAR	14.5%	6.0%	10.3%
	SAFEWAY GP S	Count	22	26	48
		% within YEAR	11.0%	13.0%	12.0%
	NO FRILLS GP	Count	12	16	28
		% within YEAR	6.0%	8.0%	7.0%
	SAVE ON FOODS GP	Count	15	7	22
		% within YEAR	7.5%	3.5%	5.5%
	FRESONS IGA GP S	Count	4	5	9
		% within YEAR	2.0%	2.5%	2.3%
	FRESONS IGA GP N	Count	4	5	9
		% within YEAR	2.0%	2.5%	2.3%
	GIANT TIGER	Count	0	2	2
		% within YEAR	0.0%	1.0%	0.5%
	CO OP GP	Count	5	6	11
		% within YEAR	2.5%	3.0%	2.8%
	OTHER SC	Count	19	6	25
		% within YEAR	9.5%	3.0%	6.3%
Total		Count	200	200	400
		% within YEAR	100.0%	100.0%	100.0%

Report

Q1B. $ EXPENDITURE AT PRIMARY CONVENIENCE SC

YEAR	N	Minimum	Mean	Maximum	Std. Deviation
Y2013	199	30	467.06	2500	319.382
Y2016	198	40	459.14	1750	256.963
Total	397	30	463.11	2500	289.597

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Y2013 VS Y2016 GRANDE PRAIRIE CONSUMER SURVEY RESULTS

$Q1C*YEAR Crosstabulation

			YEAR		
			Y2013	Y2016	Total
Q1C. MAIN REASONS SHOP PRIMARY CONVENIENCE SC - Multiple Response[a]	CLOSE TO HOME	Count	95	66	161
		% within YEAR	21.6%	14.0%	
	CLOSE WORK SCHOOL	Count	2	10	12
		% within YEAR	0.5%	2.1%	
	PRICES	Count	88	94	182
		% within YEAR	20.0%	19.9%	
	ONE STOP SHOP	Count	41	32	73
		% within YEAR	9.3%	6.8%	
	NOT CROWDED	Count	1	1	2
		% within YEAR	0.2%	0.2%	
	FAMILIARITY	Count	43	52	95
		% within YEAR	9.8%	11.0%	
	PARKING	Count	2	2	4
		% within YEAR	0.5%	0.4%	
	CUSTOMER SERVICE	Count	11	23	34
		% within YEAR	2.5%	4.9%	
	SALES PROMOS	Count	34	34	68
		% within YEAR	7.7%	7.2%	
	BUY IN BULK	Count	12	24	36
		% within YEAR	2.7%	5.1%	
	SUPPORT LOCAL	Count	7	1	8
		% within YEAR	1.6%	0.2%	
	SELECTION PRODUCTS	Count	33	49	82
		% within YEAR	7.5%	10.4%	
	SPECIFIC ITEM BRAND	Count	6	36	42
		% within YEAR	1.4%	7.6%	
	IN THE AREA	Count	0	2	2
		% within YEAR	0.0%	0.4%	
	QUALITY PRODUCTS	Count	41	29	70
		% within YEAR	9.3%	6.1%	
	CONVENIENCE ITEMS	Count	5	0	5
		% within YEAR	1.1%	0.0%	
	CLOTHING	Count	1	0	1
		% within YEAR	0.2%	0.0%	
	MEETS NEEDS	Count	8	10	18
		% within YEAR	1.8%	2.1%	

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Y2013 VS Y2016 GRANDE PRAIRIE CONSUMER SURVEY RESULTS

$Q1C*YEAR Crosstabulation

			YEAR		Total
			Y2013	Y2016	
	QUALITY STORES	Count	4	0	4
		% within YEAR	0.9%	0.0%	
	EASY ACCESS	Count	3	7	10
		% within YEAR	0.7%	1.5%	
	HOURS OF OPERATION	Count	2	1	3
		% within YEAR	0.5%	0.2%	
Total		Count	439	473	912

Percentages and totals are based on responses.

a. Group

Y2013 VS Y2016 GRANDE PRAIRIE CONSUMER SURVEY RESULTS

Q2A. PRIMARY COMPARISON SHOPPING CENTER * YEAR Crosstabulation

			YEAR		Total
			Y2013	Y2016	
Q2A. PRIMARY COMPARISON SHOPPING CENTER	NO COMPARISON PRIMARY	Count	10	18	28
		% within YEAR	5.0%	9.0%	7.0%
	WAL MART GP	Count	26	32	58
		% within YEAR	13.0%	16.0%	14.5%
	RCSS GP	Count	3	2	5
		% within YEAR	1.5%	1.0%	1.3%
	COSTCO GP	Count	21	17	38
		% within YEAR	10.5%	8.5%	9.5%
	CDN TIRE GP	Count	4	0	4
		% within YEAR	2.0%	0.0%	1.0%
	DOWNTOWN GP	Count	3	0	3
		% within YEAR	1.5%	0.0%	0.8%
	PRAIRIE MALL	Count	89	77	166
		% within YEAR	44.5%	38.5%	41.5%
	GATEWAY	Count	2	1	3
		% within YEAR	1.0%	0.5%	0.8%
	WESTGATE	Count	9	26	35
		% within YEAR	4.5%	13.0%	8.8%
	OTHER SC	Count	33	18	51
		% within YEAR	16.5%	9.0%	12.8%
	ONLINE	Count	0	9	9
		% within YEAR	0.0%	4.5%	2.3%
Total		Count	200	200	400
		% within YEAR	100.0%	100.0%	100.0%

Report

Q2B. $ EXPENDITURE AT PRIMARY COMPARISON SC

YEAR	N	Minimum	Mean	Maximum	Std. Deviation
Y2013	200	25	267.28	2000	244.141
Y2016	198	20	243.03	2500	261.081
Total	398	20	255.21	2500	252.684

Y2013 VS Y2016 GRANDE PRAIRIE CONSUMER SURVEY RESULTS

$Q2C*YEAR Crosstabulation

			YEAR		
			Y2013	Y2016	Total
Q2C. MAIN REASONS SHOP PRIMARY COMPARISON SC - Multiple Response[a]	CLOSE TO HOME	Count	27	7	34
		% within YEAR	6.6%	1.5%	
	CLOSE WORK SCHOOL	Count	5	9	14
		% within YEAR	1.2%	2.0%	
	PRICES	Count	65	63	128
		% within YEAR	15.8%	13.9%	
	ONE STOP SHOP	Count	51	55	106
		% within YEAR	12.4%	12.1%	
	NOT CROWDED	Count	4	2	6
		% within YEAR	1.0%	0.4%	
	FAMILIARITY	Count	16	7	23
		% within YEAR	3.9%	1.5%	
	PARKING	Count	6	0	6
		% within YEAR	1.5%	0.0%	
	CUSTOMER SERVICE	Count	5	8	13
		% within YEAR	1.2%	1.8%	
	SALES PROMOS	Count	13	28	41
		% within YEAR	3.2%	6.2%	
	BUY IN BULK	Count	4	1	5
		% within YEAR	1.0%	0.2%	
	SUPPORT LOCAL	Count	4	2	6
		% within YEAR	1.0%	0.4%	
	SELECTION PRODUCTS	Count	30	51	81
		% within YEAR	7.3%	11.3%	
	SELECTION STORES	Count	78	84	162
		% within YEAR	18.9%	18.5%	
	SHOP SPECIFIC STORE	Count	18	35	53
		% within YEAR	4.4%	7.7%	
	SPECIFIC ITEM BRAND	Count	7	38	45
		% within YEAR	1.7%	8.4%	
	DAY OUT WINDOW SHOP	Count	10	5	15
		% within YEAR	2.4%	1.1%	
	IN THE AREA	Count	1	3	4
		% within YEAR	0.2%	0.7%	
	QUALITY PRODUCTS	Count	13	5	18
		% within YEAR	3.2%	1.1%	

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Y2013 VS Y2016 GRANDE PRAIRIE CONSUMER SURVEY RESULTS

$Q2C*YEAR Crosstabulation

			YEAR		Total
			Y2013	Y2016	
	COMPARISON ITEMS	Count	3	0	3
		% within YEAR	0.7%	0.0%	
	CLOTHING	Count	13	22	35
		% within YEAR	3.2%	4.9%	
	SHOES	Count	2	0	2
		% within YEAR	0.5%	0.0%	
	MEETS NEEDS	Count	19	18	37
		% within YEAR	4.6%	4.0%	
	GIFTS	Count	4	0	4
		% within YEAR	1.0%	0.0%	
	PROXIMITY OTHER AREAS	Count	0	1	1
		% within YEAR	0.0%	0.2%	
	QUALITY STORES	Count	4	0	4
		% within YEAR	1.0%	0.0%	
	DEPARTMENT STORES	Count	3	0	3
		% within YEAR	0.7%	0.0%	
	EASY ACCESS	Count	3	8	11
		% within YEAR	0.7%	1.8%	
	HOURS OF OPERATION	Count	3	0	3
		% within YEAR	0.7%	0.0%	
	NO TAXES	Count	1	0	1
		% within YEAR	0.2%	0.0%	
	STORES CLUSTERED	Count	0	1	1
		% within YEAR	0.0%	0.2%	
Total		Count	412	453	865

Percentages and totals are based on responses.

a. Group

Y2013 VS Y2016 GRANDE PRAIRIE CONSUMER SURVEY RESULTS

Report

	YEAR								
	Y2013			Y2016			Total		
	N	Mean	Std. Deviation	N	Mean	Std. Deviation	N	Mean	Std. Deviation
Q3A. % SPEND CLOTHES FOOTWEAR GRANDE PRAIRIE PAST 3 MONTHS	200	68.95	37.459	200	71.72	38.021	400	70.33	37.719
Q3B. % SPEND CLOTHES FOOTWEAR OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	200	23.55	32.572	200	11.74	24.916	400	17.65	29.558
Q3C. % SPEND CLOTHES FOOTWEAR ONLINE PAST 3 MONTHS				200	9.04	22.690	200	9.04	22.690
Q3D. IMPORTANCE RATING ADD CLOTHING FOOTWEAR TO GRANDE PRAIRIE	200	6.77	2.999	200	8.15	2.368	400	7.46	2.786
Q4A. % SPEND BOOKS MUSIC GRANDE PRAIRIE PAST 3 MONTHS	200	47.95	47.841	200	45.40	47.662	400	46.67	47.709
Q4B. % SPEND BOOK MUSIC OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	200	14.05	31.529	200	5.07	20.609	400	9.56	26.978
Q4C. % SPEND BOOKS MUSIC ONLINE PAST 3 MONTHS				200	10.53	28.025	200	10.53	28.025
Q4D. IMPORTANCE RATING ADD BOOKS MUSIC TO GRANDE PRAIRIE	200	4.96	3.209	200	6.05	2.431	400	5.51	2.896
Q5A. % SPEND ELECTRONICS COMPUTERS GRANDE PRAIRIE PAST 3 MONTHS	200	38.70	47.469	200	32.35	46.560	400	35.53	47.065
Q5B. % SPEND ELECTRONICS COMPUTERS OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	200	11.80	30.250	200	1.00	9.975	400	6.40	23.136
Q5C. % SPEND ELECTRONICS COMPUTERS ONLINE PAST 3 MONTHS				200	4.15	19.186	200	4.15	19.186
Q5D. IMPORTANCE RATING ADD ELECTRONICS COMPUTERS TO GRANDE PRAIRIE	200	4.10	2.877	200	5.40	2.106	400	4.75	2.602
Q6A. % SPEND FURNISHINGS APPLIANCES GRANDE PRAIRIE PAST 3 MONTHS	200	37.95	47.124	200	38.10	48.385	400	38.03	47.699

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Y2013 VS Y2016 GRANDE PRAIRIE CONSUMER SURVEY RESULTS

Report

	YEAR								
	Y2013			Y2016			Total		
	N	Mean	Std. Deviation	N	Mean	Std. Deviation	N	Mean	Std. Deviation
Q6B. % SPEND FURNISHINGS APPLIANCES OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	200	5.05	18.328	200	3.40	17.348	400	4.22	17.842
Q6C. % SPEND FURNISHINGS APPLIANCES ONLINE PAST 3 MONTHS				200	2.00	14.035	200	2.00	14.035
Q6D. IMPORTANCE RATING ADD FURNISHINGS APPLIANCES TO GRANDE PRAIRIE	200	4.48	3.077	200	5.83	2.278	400	5.15	2.787
Q7A. % SPEND SPORTING GOODS TOYS HOBBIES GRANDE PRAIRIE PAST 3 MONTHS	200	54.93	47.178	200	54.05	46.016	400	54.49	46.544
Q7B. % SPEND SPORTING GOODS TOYS HOBBIES OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	200	10.08	25.458	200	7.78	23.980	400	8.93	24.726
Q7C. % SPEND SPORTING GOODS TOYS HOBBIES ONLINE PAST 3 MONTHS				200	6.18	18.410	200	6.18	18.410
Q7D. IMPORTANCE RATING ADD SPORTING GOODS TOYS HOBBIES TO GRANDE PRAIRIE	200	5.91	3.102	200	6.74	2.606	400	6.32	2.891
Q8A. % SPEND SPECIALTY RETAIL GRANDE PRAIRIE PAST 3 MONTHS	200	42.46	47.017	200	41.28	48.622	400	41.87	47.770
Q8B. % SPEND SPECIALTY RETAIL OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	200	11.54	27.949	200	4.50	19.842	400	8.02	24.462
Q8C. % SPEND SPECIALTY RETAIL ONLINE PAST 3 MONTHS				200	4.73	19.748	200	4.73	19.748
Q8D. IMPORTANCE RATING ADD SPECIALTY RETAIL TO GRANDE PRAIRIE	200	4.51	3.036	200	5.58	2.089	400	5.04	2.658
Q9A. % SPEND GROCERY DRUGSTORE GRANDE PRAIRIE PAST 3 MONTHS	200	86.62	30.597	200	89.29	25.355	400	87.96	28.095

Y2013 VS Y2016 GRANDE PRAIRIE CONSUMER SURVEY RESULTS

Report

	YEAR								
	Y2013			Y2016			Total		
	N	Mean	Std. Deviation	N	Mean	Std. Deviation	N	Mean	Std. Deviation
Q9B. % SPEND GROCERY DRUGSTORE OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	200	11.87	28.696	200	7.53	20.937	400	9.70	25.181
Q9C. % SPEND GROCERY DRUGSTORE ONLINE PAST 3 MONTHS				200	1.17	7.765	200	1.17	7.765
Q9D. IMPORTANCE RATING ADD GROCERY DRUGSTORE TO GRANDE PRAIRIE	200	4.05	3.181	200	5.18	1.614	400	4.62	2.582
Q10A. % SPEND HOME IMPROVEMENT GARDEN GRANDE PRAIRIE PAST 3 MONTHS	200	40.05	48.105	200	32.50	46.420	400	36.28	47.361
Q10B. % SPEND HOME IMPROVEMENT GARDEN OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	199	4.47	18.163	200	1.15	9.212	399	2.81	14.468
Q10C. % SPEND HOME IMPROVEMENT GARDEN ONLINE PAST 3 MONTHS				200	.35	3.801	200	.35	3.801
Q10D. IMPORTANCE RATING ADD HOME IMPROVEMENT GARDEN TO GRANDE PRAIRIE	200	4.06	3.063	200	4.94	1.481	400	4.50	2.443
Q11A. % SPEND OFFICE SUPPLIES GRANDE PRAIRIE PAST 3 MONTHS	200	46.68	49.318	200	46.78	49.291	400	46.73	49.243
Q11B. % SPEND OFFICE SUPPLIES OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	200	6.33	22.940	200	2.13	12.395	400	4.23	18.534
Q11C. % SPEND OFFICE SUPPLIES ONLINE PAST 3 MONTHS				200	.60	5.174	200	.60	5.174
Q11D. IMPORTANCE RATING ADD OFFICE SUPPLIES TO GRANDE PRAIRIE	200	3.72	2.820	200	5.37	1.955	400	4.55	2.561
Q12A. % SPEND PET SUPPLIES SERVICES GRANDE PRAIRIE PAST 3 MONTHS	200	50.48	49.397	200	51.65	49.516	400	51.06	49.398
Q12B. % SPEND PET SUPPLIES SERVICES OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	199	5.05	20.232	200	4.80	20.143	399	4.92	20.163

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Y2013 VS Y2016 GRANDE PRAIRIE CONSUMER SURVEY RESULTS

Report

	YEAR								
	Y2013			Y2016			Total		
	N	Mean	Std. Deviation	N	Mean	Std. Deviation	N	Mean	Std. Deviation
Q12C. % SPEND PET SUPPLIES SERVICES ONLINE PAST 3 MONTHS				200	.55	7.103	200	.55	7.103
Q12D. IMPORTANCE RATING ADD PET SUPPLIES SERVICES TO GRANDE PRAIRIE	200	3.45	2.776	200	5.15	1.577	400	4.30	2.409
Q13A. % SPEND AUTOMOTIVE GRANDE PRAIRIE PAST 3 MONTHS	200	52.65	48.738	200	54.00	49.459	400	53.33	49.043
Q13B. % SPEND AUTOMOTIVE OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	199	12.91	31.616	200	8.00	26.257	399	10.45	29.121
Q13C. % SPEND AUTOMOTIVE ONLINE PAST 3 MONTHS				200	.50	7.071	200	.50	7.071
Q13D. IMPORTANCE RATING ADD AUTOMOTIVE TO GRANDE PRAIRIE	200	4.39	3.277	200	5.00	1.504	400	4.70	2.565
Q14A. % USE PERSONAL SERVICES GRANDE PRAIRIE PAST 3 MONTHS	200	66.50	45.883	200	62.03	47.943	400	64.26	46.919
Q14B. % USE PERSONAL SERVICES OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	199	14.07	32.876	200	7.23	24.850	399	10.64	29.295
Q14C. % USE PERSONAL SERVICES ONLINE PAST 3 MONTHS				200	.75	7.890	200	.75	7.890
Q14D. IMPORTANCE RATING ADD PERSONAL SERVICES TO GRANDE PRAIRIE	200	4.16	2.968	200	5.32	1.741	400	4.74	2.499
Q15A. % USE PROFESSIONAL FINANCIAL SERVICES GRANDE PRAIRIE PAST 3 MONTHS	200	73.25	41.652	200	83.93	33.336	400	78.59	38.053
Q15B. % USE PROFESSIONAL FINANCIAL SERVICES OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	199	13.82	31.006	200	13.95	31.764	399	13.88	31.349
Q15C. % USE PROFESSIONAL FINANCIAL SERVICES ONLINE PAST 3 MONTHS				200	1.13	8.043	200	1.13	8.043

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Y2013 VS Y2016 GRANDE PRAIRIE CONSUMER SURVEY RESULTS

Report

	YEAR								
	Y2013			Y2016			Total		
	N	Mean	Std. Deviation	N	Mean	Std. Deviation	N	Mean	Std. Deviation
Q15D. IMPORTANCE RATING ADD PROFESSIONAL FINANCIAL SERVICES TO GRANDE PRAIRIE	200	6.38	3.171	200	5.98	2.344	400	6.18	2.792
Q16A. % USE FITNESS DAY SPA GRANDE PRAIRIE PAST 3 MONTHS	200	32.25	46.629	200	51.65	49.710	400	41.95	49.104
Q16B. % USE FITNESS DAY SPA OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	199	5.28	21.923	200	6.35	23.643	399	5.81	22.779
Q16C. % USE FITNESS DAY SPA ONLINE PAST 3 MONTHS				200	.00	.000	200	.00	.000
Q16D. IMPORTANCE RATING ADD FITNESS DAY SPA TO GRANDE PRAIRIE	200	3.60	2.811	200	5.16	1.584	400	4.38	2.410
Q17A. % GO TO COFFEE CAFE FAST FOOD GRANDE PRAIRIE PAST 3 MONTHS	200	81.65	30.993	200	87.48	26.458	400	84.56	28.926
Q17B. % GO TO COFFEE CAFE FAST FOOD OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	198	13.48	24.936	200	9.52	21.563	398	11.49	23.357
Q17C. % GO TO COFFEE CAFE FAST FOOD ONLINE PAST 3 MONTHS				200	.00	.000	200	.00	.000
Q17D. IMPORTANCE RATING ADD COFFEE CAFE FAST FOOD TO GRANDE PRAIRIE	200	4.41	3.105	200	5.38	1.732	400	4.90	2.557
Q18A. % EAT OUT FULL SERVICE RESTAURANTS GRANDE PRAIRIE PAST 3 MONTHS	200	77.25	32.372	200	80.82	34.335	400	79.04	33.374
Q18B. % EAT OUT FULL SERVICE RESTAURANTS OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	199	18.34	27.988	200	12.18	26.382	399	15.25	27.335
Q18C. % EAT OUT FULL SERVICE RESTAURANTS ONLINE PAST 3 MONTHS				200	.00	.000	200	.00	.000
Q18D. IMPORTANCE RATING ADD FULL SERVICE RESTAURANTS TO GRANDE PRAIRIE	200	6.42	2.892	200	8.30	2.458	400	7.36	2.840

Y2013 VS Y2016 GRANDE PRAIRIE CONSUMER SURVEY RESULTS

Report

	YEAR								
	Y2013			Y2016			Total		
	N	Mean	Std. Deviation	N	Mean	Std. Deviation	N	Mean	Std. Deviation
Q19A. % USE ENTERTAINMENT GRANDE PRAIRIE PAST 3 MONTHS	200	62.45	44.864	200	74.93	41.342	400	68.69	43.535
Q19B. % USE ENTERTAINMENT OUTSIDE GRANDE PRAIRIE PAST 3 MONTHS	199	10.10	23.810	200	6.07	19.861	399	8.08	21.984
Q19C. % USE ENTERTAINMENT ONLINE PAST 3 MONTHS				200	.50	7.071	200	.50	7.071
Q19D. IMPORTANCE RATING ADD ENTERTAINMENT TO GRANDE PRAIRIE	200	5.74	3.219	200	7.11	2.763	400	6.42	3.074

Y2013 VS Y2016 GRANDE PRAIRIE CONSUMER SURVEY RESULTS

$Q20*YEAR Crosstabulation

			YEAR		Total
			Y2013	Y2016	
Q20. LIKE MOST ABOUT SHOPPING OPPORTUNITIES IN GRANDE PRAIRIE - Multiple Response[a]	NOTHING SPECIFIC	Count	5	9	14
		% within YEAR	1.1%	2.1%	
	CLOSE TO HOME	Count	43	15	58
		% within YEAR	9.8%	3.4%	
	CLOSE TO WORK SCHOOL	Count	1	0	1
		% within YEAR	0.2%	0.0%	
	PRICES SALES	Count	42	24	66
		% within YEAR	9.6%	5.5%	
	ONE STOP SHOP	Count	7	2	9
		% within YEAR	1.6%	0.5%	
	NOT CROWDED	Count	7	6	13
		% within YEAR	1.6%	1.4%	
	MEETS NEEDS	Count	48	55	103
		% within YEAR	11.0%	12.6%	
	PARKING TRAFFIC	Count	7	2	9
		% within YEAR	1.6%	0.5%	
	CUSTOMER SERVICE	Count	13	28	41
		% within YEAR	3.0%	6.4%	
	EASY ACCESS	Count	22	35	57
		% within YEAR	5.0%	8.0%	
	SELECTION STORES	Count	73	62	135
		% within YEAR	16.7%	14.2%	
	SELECTION RESTAURANTS	Count	1	8	9
		% within YEAR	0.2%	1.8%	
	LIKE SPECIFIC STORE	Count	32	11	43
		% within YEAR	7.3%	2.5%	
	PROFESSIONAL PERSONAL SERVICES	Count	0	2	2
		% within YEAR	0.0%	0.5%	
	IN STOCK	Count	3	0	3
		% within YEAR	0.7%	0.0%	
	PROXIMITY OTHER AREAS STORES	Count	39	47	86
		% within YEAR	8.9%	10.7%	
	DEPARTMENT STORES	Count	1	0	1
		% within YEAR	0.2%	0.0%	
	SUPPORT LOCAL	Count	15	13	28
		% within YEAR	3.4%	3.0%	

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Y2013 VS Y2016 GRANDE PRAIRIE CONSUMER SURVEY RESULTS

$Q20*YEAR Crosstabulation

			YEAR		
			Y2013	Y2016	Total
	FAMILIARITY	Count	9	2	11
		% within YEAR	2.1%	0.5%	
	QUALITY STORES	Count	1	0	1
		% within YEAR	0.2%	0.0%	
	LIKE NEW STORES	Count	58	64	122
		% within YEAR	13.3%	14.6%	
	HOURS OF OPERATION	Count	1	1	2
		% within YEAR	0.2%	0.2%	
	ENTERTAINMENT	Count	1	7	8
		% within YEAR	0.2%	1.6%	
	NO TAX	Count	8	3	11
		% within YEAR	1.8%	0.7%	
	NOT GO OUTSIDE GP	Count	0	22	22
		% within YEAR	0.0%	5.0%	
	LIKE DT STORES	Count	0	15	15
		% within YEAR	0.0%	3.4%	
	TRANSIT	Count	0	5	5
		% within YEAR	0.0%	1.1%	
Total		Count	437	438	875

Percentages and totals are based on responses.

a. Group

Y2013 VS Y2016 GRANDE PRAIRIE CONSUMER SURVEY RESULTS

$Q21*YEAR Crosstabulation

			YEAR		Total
			Y2013	Y2016	
Q21. DISLIKE MOST ABOUT SHOPPING OPPORTUNITIES IN GRANDE PRAIRIE - Multiple Response[a]	NOTHING SPECIFIC	Count	30	44	74
		% within YEAR	8.7%	14.7%	
	PRICES SALES	Count	21	29	50
		% within YEAR	6.1%	9.7%	
	CROWDED	Count	26	10	36
		% within YEAR	7.6%	3.3%	
	PARKING TRAFFIC	Count	47	39	86
		% within YEAR	13.7%	13.0%	
	CUSTOMER SERVICE	Count	35	21	56
		% within YEAR	10.2%	7.0%	
	ACCESS	Count	5	2	7
		% within YEAR	1.5%	0.7%	
	SELECTION STORES	Count	75	10	85
		% within YEAR	21.9%	3.3%	
	SELECTION RESTAURANTS	Count	21	2	23
		% within YEAR	6.1%	0.7%	
	MISSING SPECIFIC STORE	Count	17	63	80
		% within YEAR	5.0%	21.1%	
	PROFESSIONAL PERSONAL SERVICES	Count	12	3	15
		% within YEAR	3.5%	1.0%	
	SELECTION PRODUCTS	Count	4	0	4
		% within YEAR	1.2%	0.0%	
	NOT IN STOCK	Count	6	4	10
		% within YEAR	1.7%	1.3%	
	NOT PEDESTRIAN FRIENDLY	Count	10	3	13
		% within YEAR	2.9%	1.0%	
	LACKS DEPARTMENT STORES	Count	1	14	15
		% within YEAR	0.3%	4.7%	
	DOES NOT SUPPORT LOCAL	Count	1	0	1
		% within YEAR	0.3%	0.0%	
	DISLIKE NEW STORES	Count	0	1	1
		% within YEAR	0.0%	0.3%	
	HOURS OF OPERATION	Count	6	2	8
		% within YEAR	1.7%	0.7%	
	ENTERTAINMENT	Count	25	9	34
		% within YEAR	7.3%	3.0%	

Y2013 VS Y2016 GRANDE PRAIRIE CONSUMER SURVEY RESULTS

$Q21*YEAR Crosstabulation

			YEAR		
			Y2013	Y2016	Total
	NEED BIGGER MALL	Count	1	2	3
		% within YEAR	0.3%	0.7%	
	LACK OVERALL COMPETITION	Count	0	25	25
		% within YEAR	0.0%	8.4%	
	ROAD CONDITIONS	Count	0	5	5
		% within YEAR	0.0%	1.7%	
	LACK STORES ACTIVITIES DT	Count	0	10	10
		% within YEAR	0.0%	3.3%	
	TRANSIT	Count	0	1	1
		% within YEAR	0.0%	0.3%	
Total		Count	343	299	642

Percentages and totals are based on responses.

a. Group

Y2013 VS Y2016 GRANDE PRAIRIE CONSUMER SURVEY RESULTS

$Q22*YEAR Crosstabulation

			YEAR		
			Y2013	Y2016	Total
Q22. STORES SERVICES INCREASE SPENDING IN GRANDE PRAIRIE - Multiple Response[a]	NOTHING SPECIFIC	Count	4	5	9
		% within YEAR	0.5%	0.6%	
	DEPT STORE	Count	12	58	70
		% within YEAR	1.5%	7.2%	
	JUNIOR BOX OUTLET STORE	Count	6	10	16
		% within YEAR	0.8%	1.2%	
	CLOTHING FOOTWEAR	Count	183	135	318
		% within YEAR	23.1%	16.8%	
	BOOKS MUSIC DVD	Count	30	36	66
		% within YEAR	3.8%	4.5%	
	ELECTRONICS COMPUTERS	Count	7	17	24
		% within YEAR	0.9%	2.1%	
	FURNISHINGS APPLIANCES	Count	36	35	71
		% within YEAR	4.5%	4.4%	
	SPORTING GOODS TOYS HOBBIES	Count	84	82	166
		% within YEAR	10.6%	10.2%	
	SPECIALTY RETAIL	Count	32	24	56
		% within YEAR	4.0%	3.0%	
	GROCERY DRUGSTORE	Count	14	13	27
		% within YEAR	1.8%	1.6%	
	HOME IMPROVEMENT GARDEN	Count	2	2	4
		% within YEAR	0.3%	0.2%	
	OFFICE SUPPLY ITEMS	Count	6	8	14
		% within YEAR	0.8%	1.0%	
	PET SUPPLIES SERVICES	Count	4	7	11
		% within YEAR	0.5%	0.9%	
	AUTOMOTIVE	Count	10	2	12
		% within YEAR	1.3%	0.2%	
	PERSONAL SERVICES	Count	4	14	18
		% within YEAR	0.5%	1.7%	
	PROFESSIONAL FINANCIAL SERVICES	Count	41	32	73
		% within YEAR	5.2%	4.0%	
	FITNESS CLUB DAY SPA	Count	5	4	9
		% within YEAR	0.6%	0.5%	
	COFFEE CAFES FAST FOOD	Count	36	16	52
		% within YEAR	4.5%	2.0%	

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Y2013 VS Y2016 GRANDE PRAIRIE CONSUMER SURVEY RESULTS

$Q22*YEAR Crosstabulation

			YEAR		
			Y2013	Y2016	Total
	FULL SERVICE RESTAURANTS	Count	206	180	386
		% within YEAR	26.0%	22.4%	
	ENTERTAINMENT	Count	63	85	148
		% within YEAR	7.9%	10.6%	
	BIGGER MALL	Count	8	4	12
		% within YEAR	1.0%	0.5%	
	MORE COMPETITION OVERALL	Count	0	21	21
		% within YEAR	0.0%	2.6%	
	MORE LOCAL STORES	Count	0	11	11
		% within YEAR	0.0%	1.4%	
	IMPROVE TRANSIT	Count	0	3	3
		% within YEAR	0.0%	0.4%	
Total		Count	793	804	1597

Percentages and totals are based on responses.

a. Group

Y2013 VS Y2016 GRANDE PRAIRIE CONSUMER SURVEY RESULTS

Report

D1. HOUSEHOLD SIZE

YEAR	N	Minimum	Mean	Maximum	Std. Deviation
Y2013	200	1	3.24	11	1.738
Y2016	200	1	3.26	10	1.517
Total	400	1	3.25	11	1.629

Report

D2. # HOUSEHOLD < 18 YEARS OLD

YEAR	N	Minimum	Mean	Maximum	Std. Deviation
Y2013	200	0	.80	9	1.264
Y2016	200	0	.81	8	1.174
Total	400	0	.81	9	1.218

D3. RESPONDENT AGE * YEAR Crosstabulation

			YEAR		Total
			Y2013	Y2016	
D3. RESPONDENT AGE	18-24	Count	49	42	91
		% within YEAR	24.5%	21.0%	22.8%
	25-34	Count	50	64	114
		% within YEAR	25.0%	32.0%	28.5%
	35-44	Count	40	42	82
		% within YEAR	20.0%	21.0%	20.5%
	45-54	Count	31	17	48
		% within YEAR	15.5%	8.5%	12.0%
	55-64	Count	14	21	35
		% within YEAR	7.0%	10.5%	8.8%
	65-74	Count	10	11	21
		% within YEAR	5.0%	5.5%	5.3%
	75+	Count	6	3	9
		% within YEAR	3.0%	1.5%	2.3%
Total		Count	200	200	400
		% within YEAR	100.0%	100.0%	100.0%

Y2013 VS Y2016 GRANDE PRAIRIE CONSUMER SURVEY RESULTS

D4. HOUSEHOLD YEARLY INCOME * YEAR Crosstabulation

			YEAR		Total
			Y2013	Y2016	
D4. HOUSEHOLD YEARLY INCOME	REFUSED DK	Count	14	45	59
		% within YEAR	7.0%	22.5%	14.8%
	<$15,000	Count	5	0	5
		% within YEAR	2.5%	0.0%	1.3%
	$15,000-$24,999	Count	12	11	23
		% within YEAR	6.0%	5.5%	5.8%
	$25,000-$34,999	Count	10	14	24
		% within YEAR	5.0%	7.0%	6.0%
	$35,000-$44,999	Count	7	16	23
		% within YEAR	3.5%	8.0%	5.8%
	$45,000-$54,999	Count	13	8	21
		% within YEAR	6.5%	4.0%	5.3%
	$55,000-$64,999	Count	19	11	30
		% within YEAR	9.5%	5.5%	7.5%
	$65,000-$74,999	Count	20	16	36
		% within YEAR	10.0%	8.0%	9.0%
	$75,000-$99,999	Count	18	17	35
		% within YEAR	9.0%	8.5%	8.8%
	$100,000-$124,999	Count	29	20	49
		% within YEAR	14.5%	10.0%	12.3%
	$125,000+	Count	53	42	95
		% within YEAR	26.5%	21.0%	23.8%
Total		Count	200	200	400
		% within YEAR	100.0%	100.0%	100.0%

D5. RESPONDENT GENDER * YEAR Crosstabulation

			YEAR		Total
			Y2013	Y2016	
D5. RESPONDENT GENDER	MALE	Count	80	62	142
		% within YEAR	40.0%	31.0%	35.5%
	FEMALE	Count	120	138	258
		% within YEAR	60.0%	69.0%	64.5%
Total		Count	200	200	400
		% within YEAR	100.0%	100.0%	100.0%

Y2013 VS Y2016 GRANDE PRAIRIE CONSUMER SURVEY RESULTS

DAY OF INTERVIEW * YEAR Crosstabulation

			YEAR		Total
			Y2013	Y2016	
DAY OF INTERVIEW	2013:TUES DEC 10 / 2016: TUES FEB 23	Count	20	40	60
		% within YEAR	10.0%	20.0%	15.0%
	2013:WED DEC 11 / 2016: WED FEB 24	Count	50	40	90
		% within YEAR	25.0%	20.0%	22.5%
	2013:THURS DEC 12 / 2016:THURS FEB 25	Count	41	40	81
		% within YEAR	20.5%	20.0%	20.3%
	2013:FRI DEC 13 / 2016: FRI FEB 26	Count	44	40	84
		% within YEAR	22.0%	20.0%	21.0%
	2013:SAT DEC 14 / 2016: SAT FEB 27	Count	45	40	85
		% within YEAR	22.5%	20.0%	21.3%
Total		Count	200	200	400
		% within YEAR	100.0%	100.0%	100.0%

TIME OF INTERVIEW * YEAR Crosstabulation

			YEAR		Total
			Y2013	Y2016	
TIME OF INTERVIEW	MORNING	Count	42	43	85
		% within YEAR	21.0%	21.5%	21.3%
	AFTERNOON	Count	117	134	251
		% within YEAR	58.5%	67.0%	62.7%
	EVENING	Count	41	23	64
		% within YEAR	20.5%	11.5%	16.0%
Total		Count	200	200	400
		% within YEAR	100.0%	100.0%	100.0%

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