2023

RETAIL MARKET & GAP ANALYSIS

City of Grande Prairie

PREPARED FOR

PREPARED BY

FBM

RESOURCEFUL SPIRIT, GROWING OPPORTUNITY

RETAIL
Market & Gap Analysis

City of Grande Prairie
Alberta

Table of CONTENTS

TABLE OF CONTENTS (TABLES & FIGURES)

TABLES

FIGURES

TABLE OF CONTENTS (TABLES & FIGURES)

Prairie Mall, Grande Prairie. Photo: Morguard

i PREFACE

FBM Planning Ltd ("FBM") was commissioned by the City of Grande Prairie to conduct a Retail Market and Gap Analysis for the City's retail sector. This study provides an update to previous studies conducted in 2014, 2016, and 2019.

The study was carried out over the period September to December 2022. To gain a greater understanding of all non-residential real estate (including retail), the City broadened the scope of the study to include industrial, office, and accommodations (completed by FBM over the same time period). This Retail report contains the update to the Retail Inventory. A sister-document containing the inventory and analysis for the other uses is also publicly available, entitled "City of Grande Prairie: Commercial and Industrial Inventory and Demand Analysis 2023".

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

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

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

Reference material for this report was obtained from, including 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, and International Council of Shopping Centers.

FBM 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 FBM as an objective and independent party; FBM 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 written permission of FBM or the City of Grande Prairie

FBM 2023

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 (also known as surplus/leakage).

LOCATION CONTEXT SUMMARY

As a strategic regional hub for retail and industrial trade and commerce, the City of 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 travel) converges in and travels through the City.

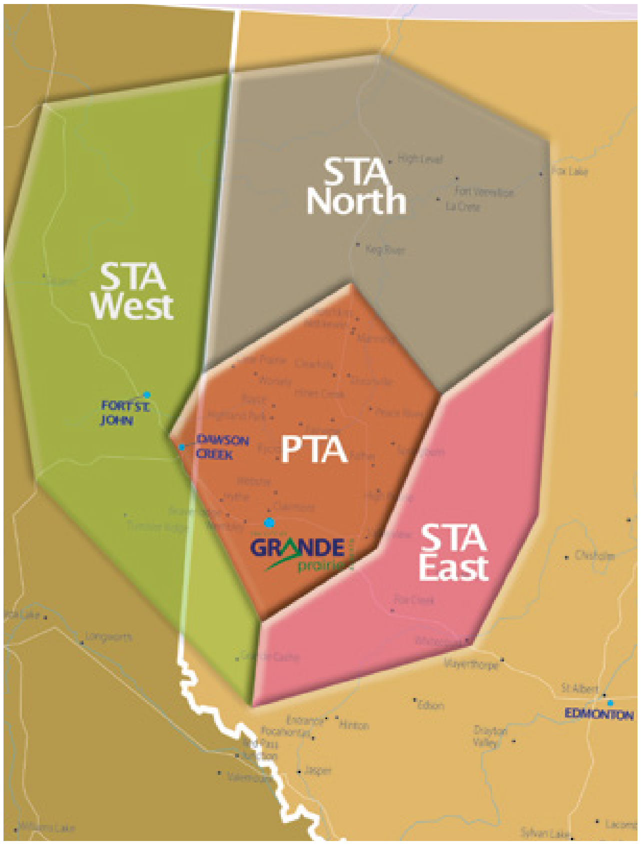
The patterns of traffic counts closely mirror the retail hot spots as well as vacant land use, particularly in the West and North areas where the largest concentrations of traffic flow exceed 40,000 AADT and for which regional traffic is an important consideration for larger Regional and power centre type uses.

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 continue to 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.

Retail Trade Areas Map:



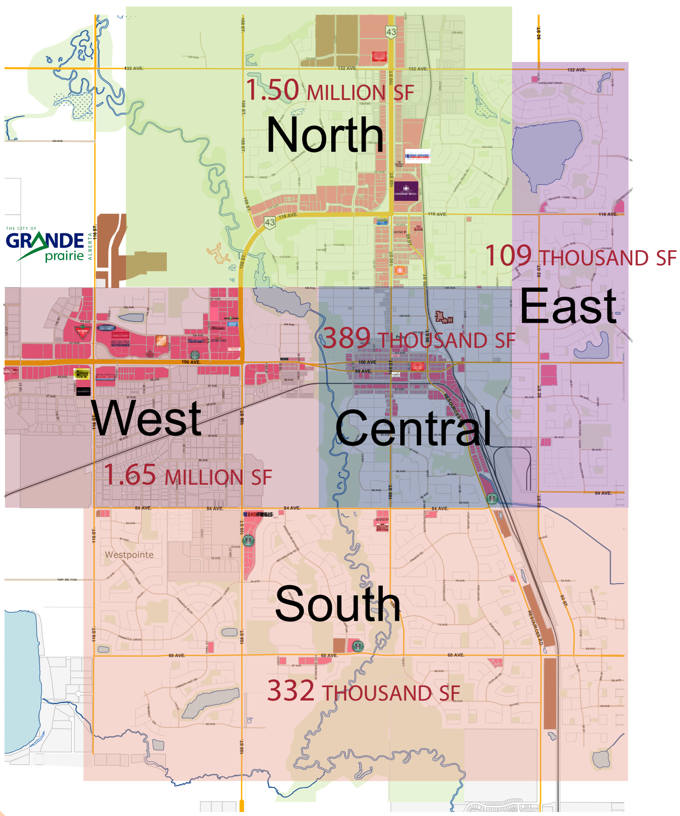
EXECUTIVE SUMMARY

RETAIL TRADE AREA SUMMARY

The Total Trade Area penetrates approximately 295,000 residents, which is forecast to grow by a further 24,000 over the next decade. The Primary Trade Area alone has almost 177,000 residents including the City of Grande Prairie. The Total Trade Area within an approximate 2 hour drive time has a retail spending catchment estimated at $5.1 Billion in 2022.

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

This study divides the City into five sectors:



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 occupied city retail inventory, which is quantified and estimated on a category-by-category and sector-by-sector basis, was found to be just 3.98 million square feet (sf) total, which would not in isolation be supported by the City of Grande Prairie residents alone.

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

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

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

The evolution of the City 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 5.24 million sf.

When compared against the current city's **occupied retail inventory** or supply at 3.98 million sf, the difference between demand and supply equates to almost 1.06 million sf of residual retail demand that could be supported in the City of Grande Prairie (this value includes current vacant space in the City).

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 $374 million.

CONSUMER SURVEY SUMMARY

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

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

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

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

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

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

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

ii EXECUTIVE SUMMARY

CONCLUSION

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

FACT - City of Grande Prairie serves a Total Trade Area of over 295,000 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 contains just under 177,000 residents.

FACT - City of Grande Prairie could support over 5.24 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 younger median age compared to the Province.

FACT - City of Grande Prairie has a net INFLOW of $374 million in Retail Sales.

FACT - City of Grande Prairie's sales attraction and retention results in just under $90.6 million in categories that exhibit retail sales OUTFLOW (including auto).

FACT - City of Grande Prairie has a current residual demand for 1.06 million sf of retail space.

FACT - City of Grande Prairie could support 500,000 sf of new retail space by 2032.

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

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

Downtown Grande Prairie. Photo: FBM

1 INTRODUCTION

1.1 REPORT STRUCTURE

FBM Planning Ltd. ("FBM") conducted on-the-ground research in September 2022 to supplement and update previous research conducted in 2013, 2015, and 2018 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 associated 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 & Context:
Lays out the important regional and local context of the City of Grande Prairie as a location in which targeted retailers could express interest.

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

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

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

Section 6 – Consumer Intercept Survey:
A Consumer Intercept Survey was conducted in which the residents of Grande Prairie and surrounding communities were interviewed. An in-person questionnaire tool was used to ascertain shopping patterns and consumer preferences for retail tenants and formats in the City of Grande Prairie, including their current spending habits and importance ratings for the types of new retail categories that the City could pursue to enhance the offering and retain spending within the community.

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

Westgate Centre, Grande Prairie. Photo: FBM

1.2
SOURCES OF INFORMATION

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

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

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

- Detailed Retail Inventory Fieldwork, updated in-person September 2022 by FBM (formerly Key Planning Strategies).
- City of Grande Prairie Municipal Census 2018.
- City of Grande Prairie Growth Study Update, November 2013.
- City of Grande Prairie Municipal Development Plan.
- City of Grande Prairie Land Use Bylaw.
- City of Grande Prairie June 2022 Vacant Lands GIS Database.
- MLS Database Fall 2022
- City of Grande Prairie Traffic Counts.
- Alberta Ministry of Transportation, Highways 1 to 986 Traffic Volume 2018.
- Population Projection -Alberta and Census Divisions, 2018 - 2046.
- Manifold Data Mining Inc, Demographic and Spending Data 2022.
- Statistics Canada.
- Conference Board of Canada 2018.
- Keyfax Market Research Consumer Intercept Survey, March 2019.

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

- Avison Young
- Conference Board of Canada
- Hoffos Menzies Real Estate Group (eXp Realty)
- International Council of Shopping Centers
- KCM Commercial
- Morguard
- ONE Properties
- Prudential Land
- ReMax Realty
- Royal LePage Grande Prairie
- Tom Shields Realty
- Wexford Developments.

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, even extends into neighbouring provinces ad territories to the north and northwest.

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, northeast British Columbia as well as southern parts of 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 295,000 people spanning northwestern Alberta, northeastern British Columbia, and the Northwest Territories.

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

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

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

2.3 MUNICIPAL DEVELOPMENT PLAN

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

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

Figure 2.1
CITY OF GRANDE REGIONAL CONTEXT MAP
(Source: City of Grande Prairie Municipal Development Plan)

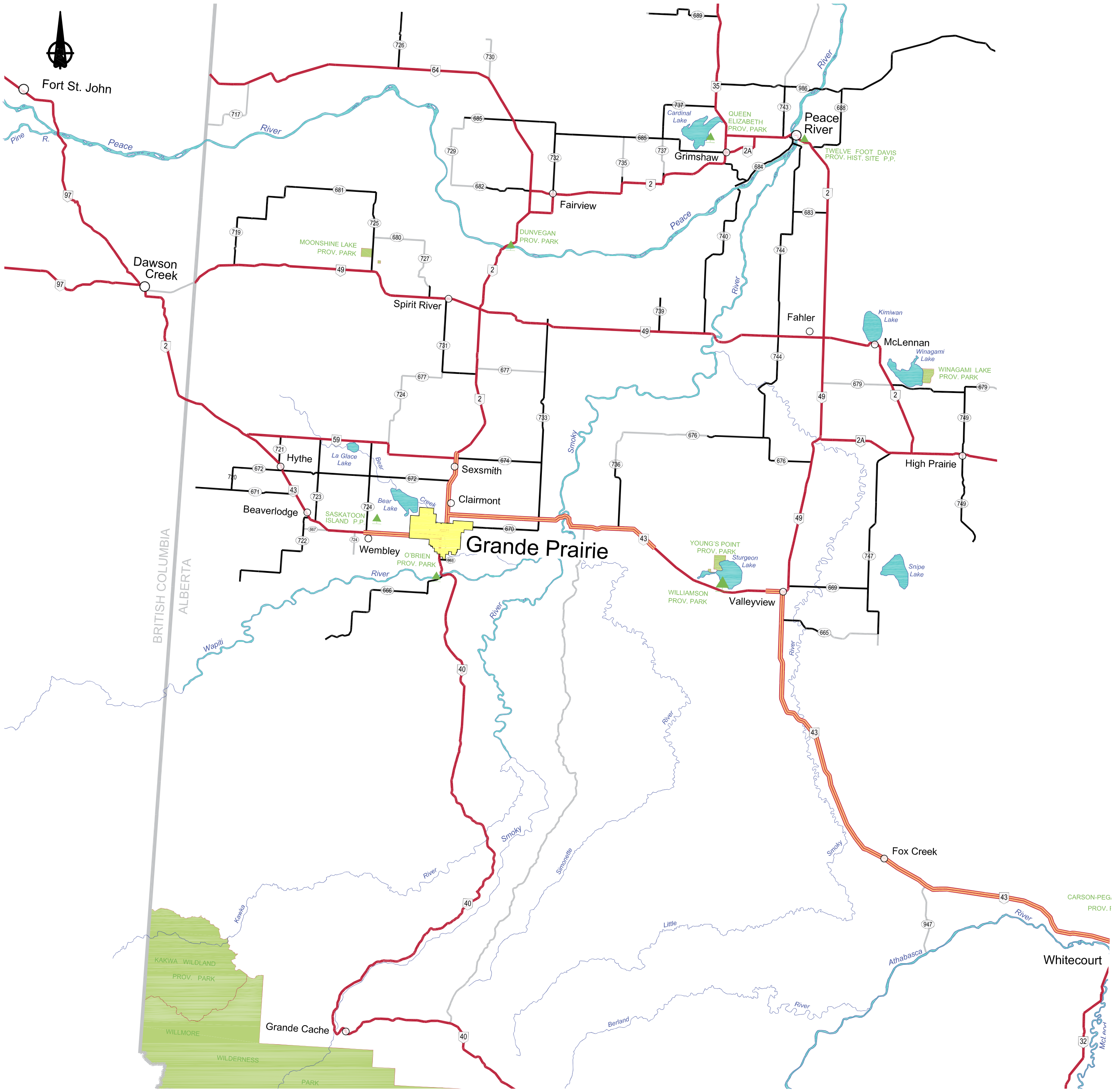


Figure 2.2

CITY OF GRANDE PRAIRIE VACANT LAND USE MAP

(Source: City of Grande Prairie Open Data 2019)

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

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

The goal of the MDP states:

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

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

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

2.4
VACANT LAND USE CONTEXT

Figure 2.2 shows vacant lands in the City. The 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

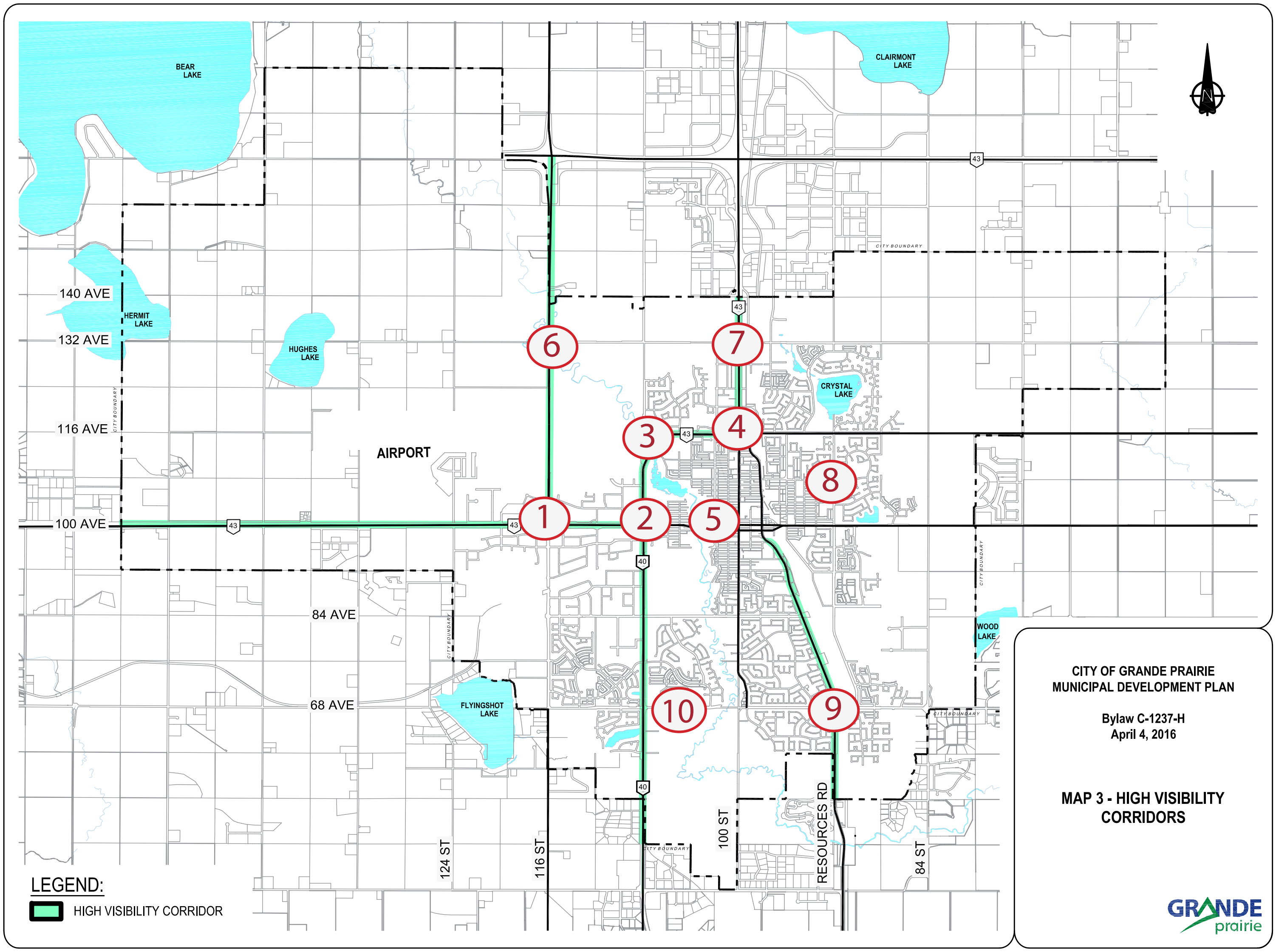
One of the most significant determinants to successful commercial development relates to patterns of transportation. The ability to be accessible as well as visible to high volumes of traffic is a major consideration for retail businesses. For a regional market such as Grande Prairie that attracts a 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), (#4) 116th Ave (Hwy 43 at 100th St), and (#7) Resources Road (North/South).

Figure 2.3

CITY OF GRANDE PRAIRIE HIGH VOLUME TRAFFIC CORRIDORS

(Source: City of Grande Prairie GIS Portal - Traffic Counts Dashboard, 2023)



The City of Grande Prairie undertakes traffic counts at various years and points within the City. Referring to **Figure 2.3**, the most recent average total daily traffic (AADT) counts by the City's Traffic Counts Dashboard is documented for the following intersections (with year of data in parentheses):

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

42,282 total all directions (2018)

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

54,975 total all directions (2018)

3) Hwy 43 at 108th St.

40,392 total all directions (2018)

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

52,090 total all directions (2018)

5) 100th Ave at 105th St. Downtown

26,086 total all directions (2018)

6) 132nd Ave at 116th St.

20,697 total all directions (2019)

7) Hwy 43 at 132nd St.

31,102 total all directions (2020)

8) 106th Ave at 92nd St.

14,158 total all directions (2021)

9) 68th Ave at Resources Road

25,846 total all directions (2018)

10) 68th Ave at Stoneridge

28,167 total all directions (2018)

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 exceed 40,000 AADT and for which regional traffic is an important consideration for larger Regional and power centre type uses.

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

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

Figure 2.4

TOTAL NUMBER OF ALL APPROVED BUILDING PERMITS IN CITY 2018 - 2022

(Source: City of Grande Prairie 2018-2022)

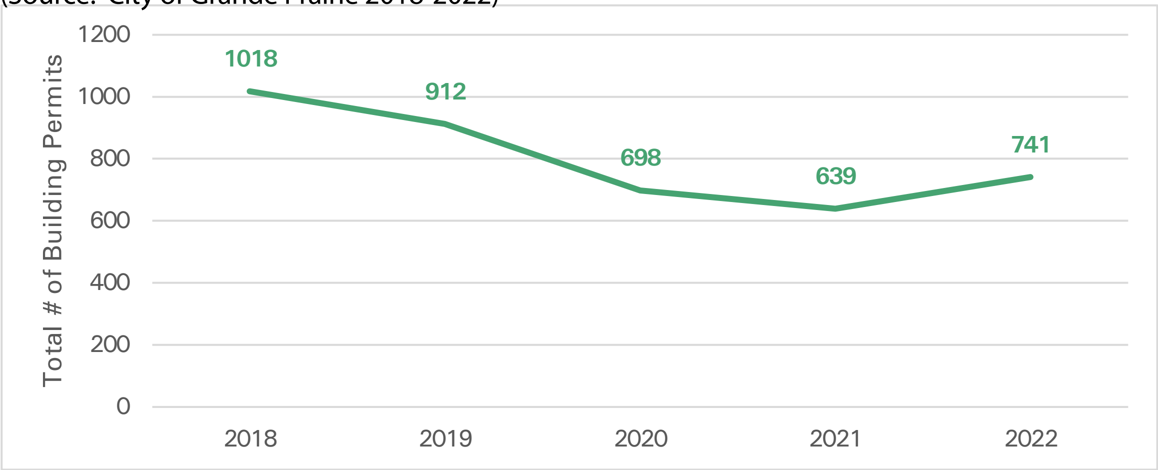


Figure 2.5

TOTAL NUMBER OF COMMERCIAL & INDUSTRIAL BUILDING PERMITS 2018 - 2022

(Source: City of Grande Prairie 2018-2022)

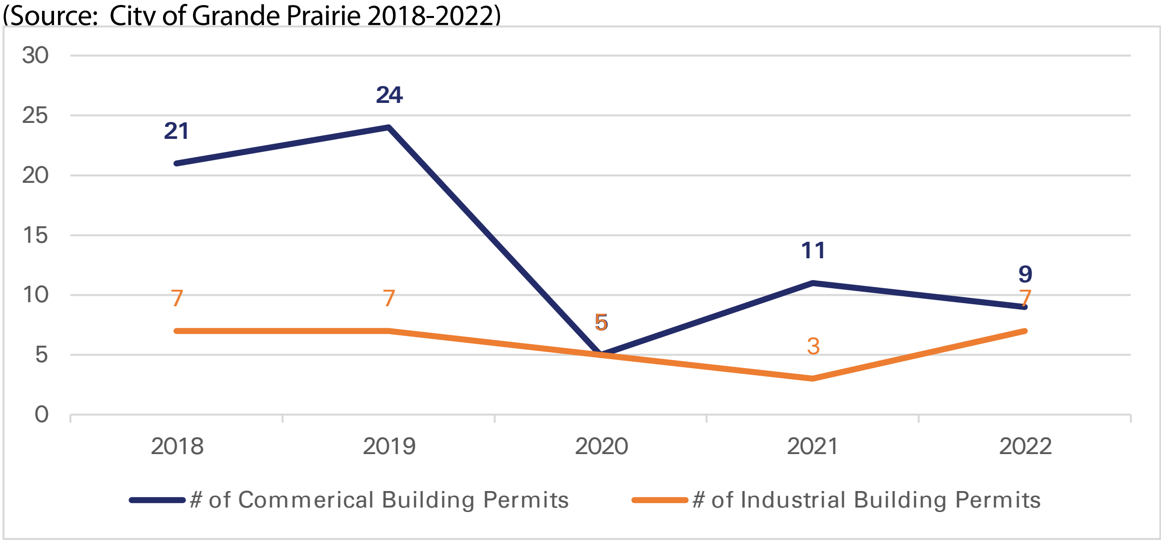
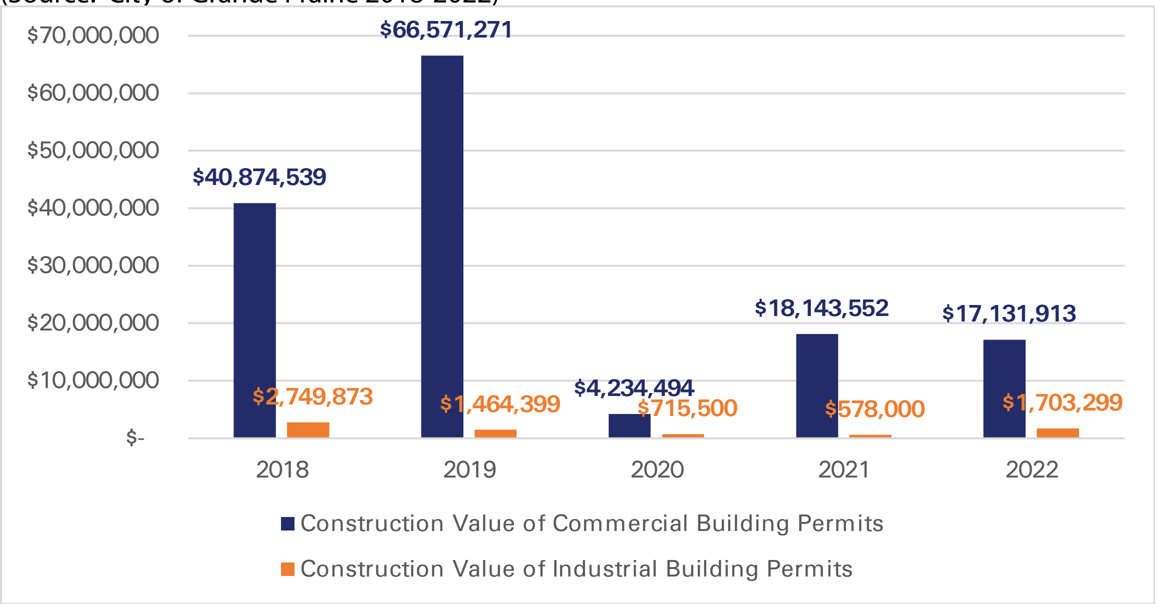


Figure 2.6

TOTAL CONSTRUCTION VALUE OF COMMERCIAL & INDUSTRIAL PERMITS 2013 - 2018

(Source: City of Grande Prairie 2018-2022)



2.6
BUILDING PERMIT DATA

Building Permit activity can provide empirical evidence of growth dynamics necessary to support commercial and retail opportunities.

Figure 2.4 illustrates the historic volume of all building permits in the City of Grande Prairie over the past five years, while **Figure 2.5** and **Figure 2.6** show the number and value of only commercial and industrial building permits over the past five years. The Commercial building permits would contain the most retail uses.

The building permit data shows that Commercial permits and construction values were on the rise between 2018 and 2019, but then both total numbers and total construction values dropped dramatically by the end of 2020 - clearly impacted by the global COVID-19 pandemic. Commercial building permits and values were particularly affected.

All three figures also show the beginnings of recovery following the first year of the pandemic with almost all beginning to increase in 2021 and 2022.

2.7
SUMMARY & IMPLICATIONS

The City of Grande Prairie continues to have the pillars and contextual assets for a successful regional retail market, though the market is becoming more saturated requiring a targeted approach for retail development and retail prospects.

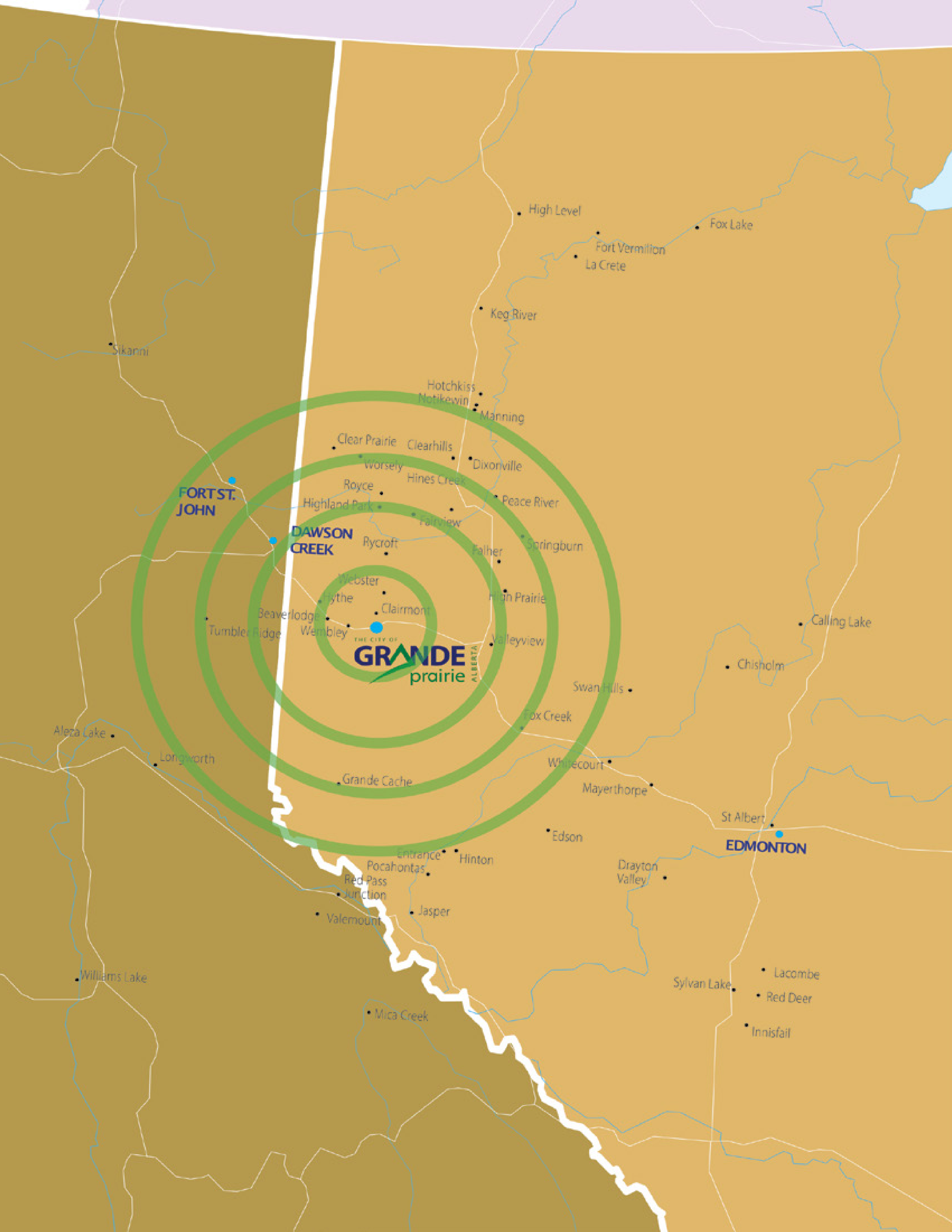
Not only is the city located at the centre of the wider region, the major highway infrastructure and transportation network (including air) converges in and travels through the City.

Traffic counts at major retail nodes continue exhibit daily total traffic volume in excess of 40,000 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 15,000 to 20,000 vehicles per day.

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

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

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


High Level
Fox Lake
Fort Vermilion
La Crete
Keg River
Sikanni
Hotchkiss
Notikewin
Manning
Clear Prairie
Clearhills
Worsely
Dixonville
Royce
Hines Creek
FORT ST. JOHN
Highland Park
Peace River
Fairview
DAWSON CREEK
Rycroft
Springburn
Falher
Webster
Hythe
High Prairie
Clairmont
Beaverlodge
Wembley
Tumbler Ridge
Calling Lake
Valleyview
THE CITY OF
GRANDE
prairie
ALBERTA
Chisholm
Swan Hills
Fox Creek
Aleza Lake
Longworth
Whitecourt
Grande Cache
Mayerthorpe
St Albert
EDMONTON
Edson
Entrance
Hinton
Pocahontas
Drayton Valley
Red Pass
Junction
Jasper
Valemount
Lacombe
Sylvan Lake
Red Deer
Williams Lake
Mica Creek
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, which is that area from which the City of Grande Prairie's retail sales are most frequently and likely to be sourced and generated by local and regional residents.

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

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

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

Retail Trade Area Determinants

i. Transportation networks, including streets and highways, which affect access, travel times, commuting and employment distribution patterns;

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

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

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

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

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

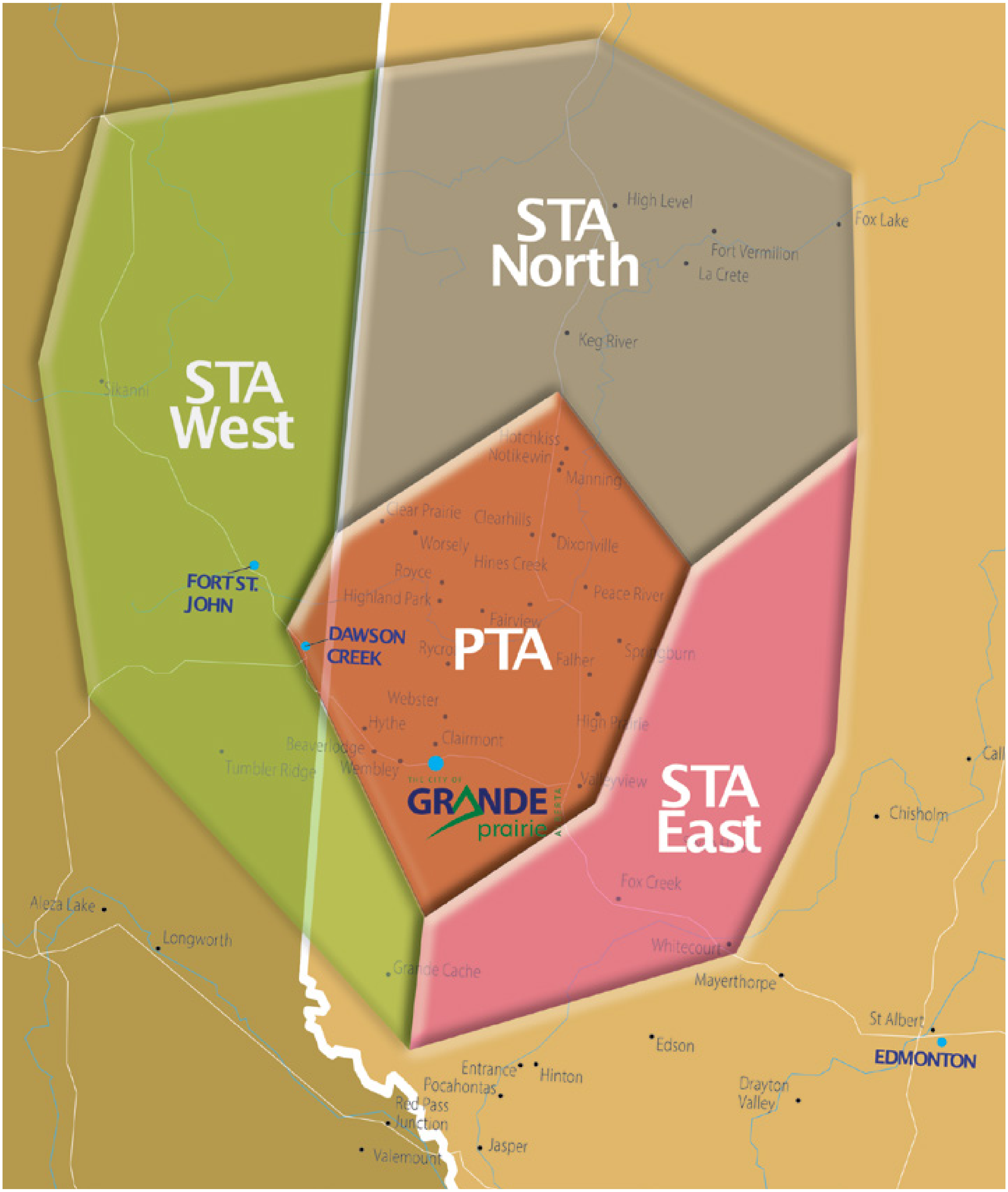
vii. De facto barriers resulting from notable socioeconomic differentiation;

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

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

Figure 3.1

CITY OF GRANDE PRAIRIE RETAIL TRADE AREA



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

A Trade Area is typically subdivided to provide a more refined analysis of the its retail opportunity. For the City of Grande Prairie, these subdivisions include a Primary Trade Area (PTA) from which the majority of retail sales originate, and a series of Secondary Trade Areas (STAs), each of which is specifically delineated based on factors such as transportation, population, geographic barriers, etc.

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

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

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

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

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

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

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

Figure 3.2

BONNETTS ENERGY CENTRE (FKA REVOLUTION PLACE) MAJOR EVENT ATTENDEES RESIDENCE OF ORIGIN - HEAT MAP

(Source: Manifold Data Mining, City of Grande Prairie, and FBM)

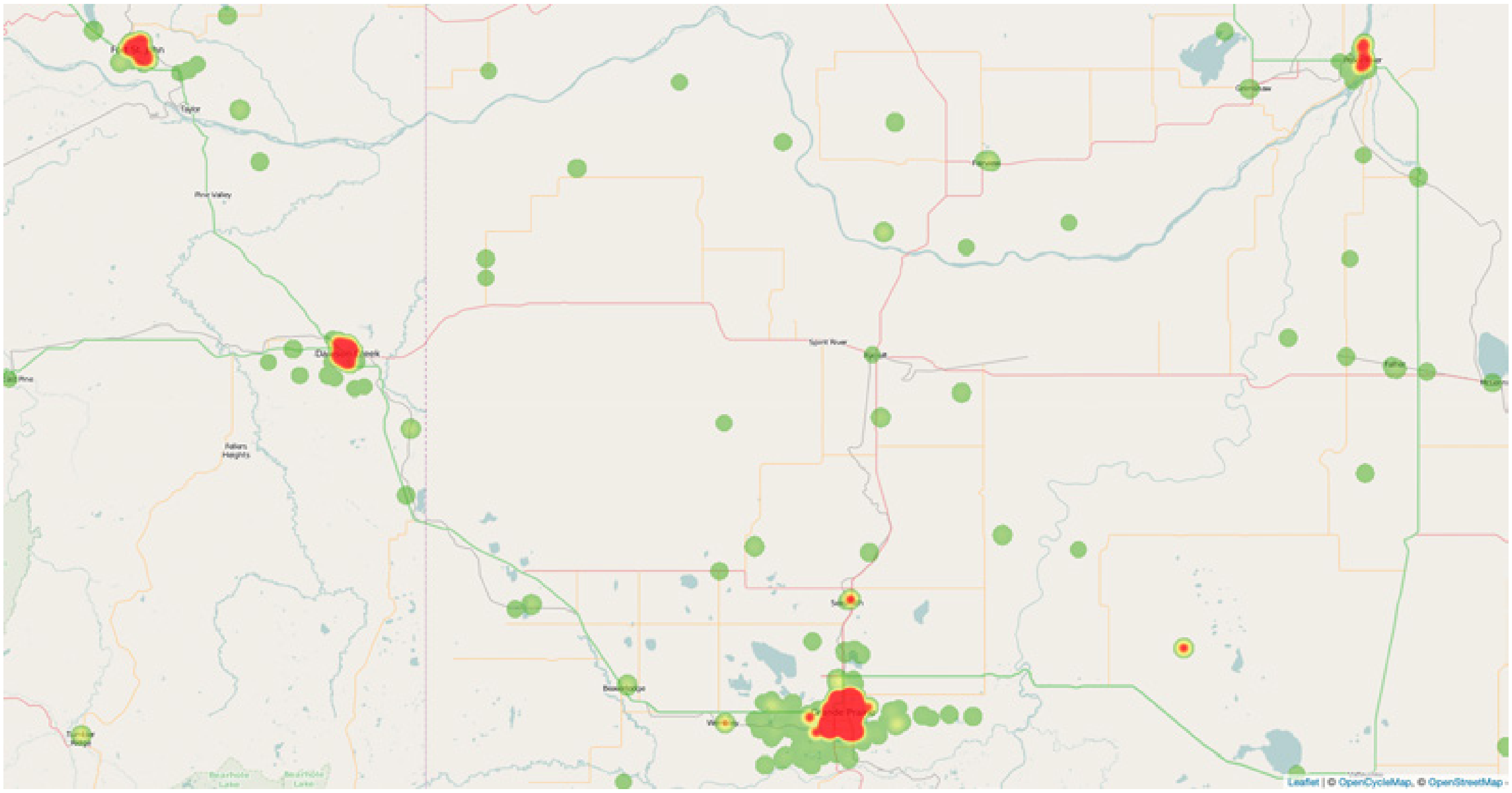


Figure 3.3

BONNETTS ENERGY CENTRE (FKA REVOLUTION PLACE) MAJOR EVENT ATTENDEES RESIDENCE OF ORIGIN - POSTAL CODE COUNTS

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

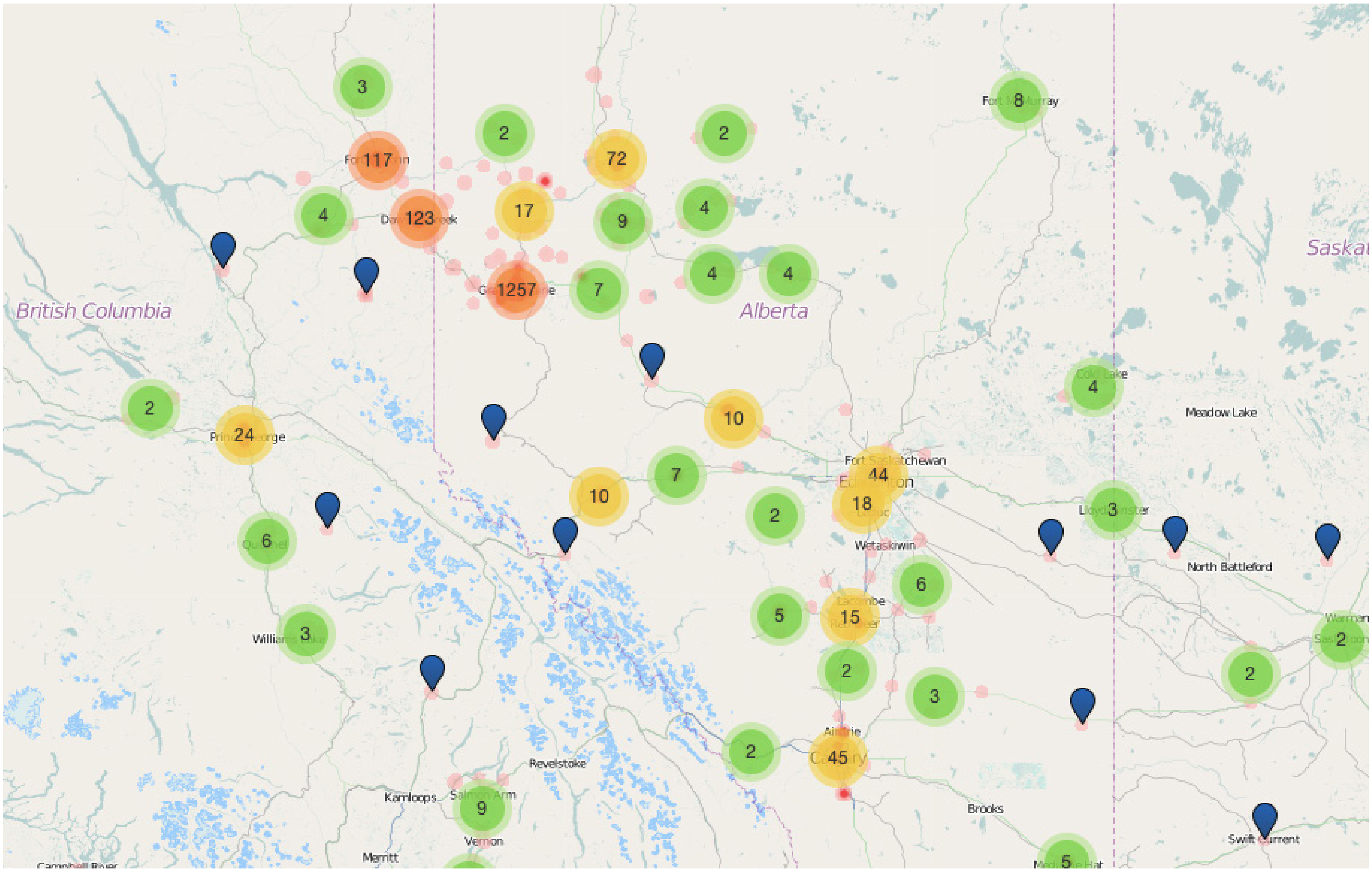


Table 3.1

TRADE AREA POPULATION PROJECTIONS SUMMARY 2022 TO 2032

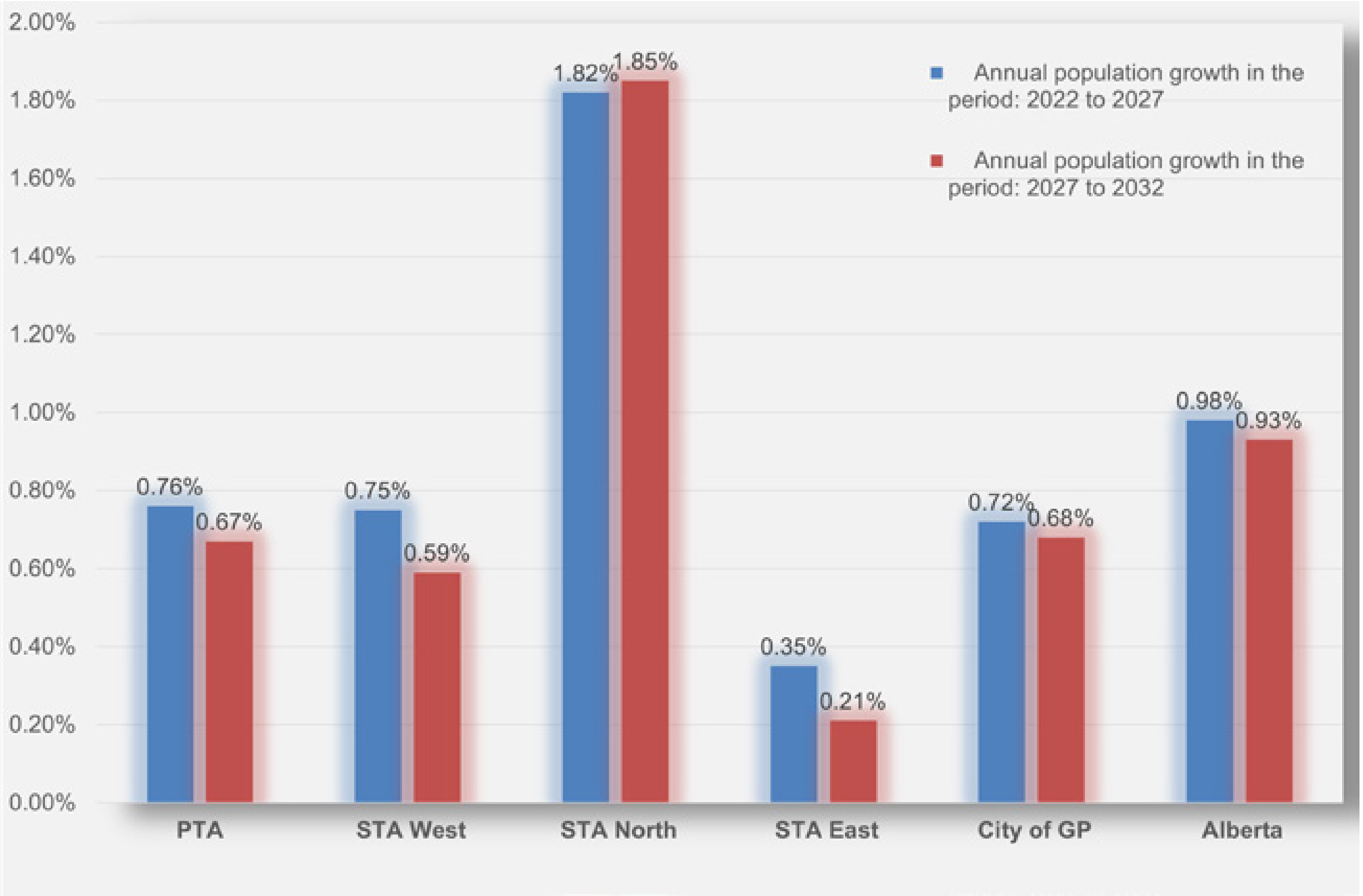
(Source: Manifold Data Mining 2022)

Attribute	GP - PTA	GP - STA West	GP - STA North	GP - STA East	GP - Total Trade Area	INDEX Benchmark Grande Prairie (CMA/CA,AB	Alberta
Summary							
SUMMARY							
Total population (year end 2022 estimates)	176,833	61,462	26,420	30,363	295,079	67,202	4,491,760
Total number of private households	66,463	24,432	7,644	11,529	110,067	25,968	1,711,590
Average number of persons in private households	2.61	2.46	3.45	2.61	2.64	2.53	2.57
POPULATION GROWTH							
2022 Population (year end 2022 estimates)	176,833	61,462	26,420	30,363	295,079	67,202	4,491,760
2027 Population Forecast	183,775	63,827	28,926	30,908	307,437	69,649	4,716,090
2032 Population Forecast	190,098	65,766	31,711	31,245	318,819	72,062	4,938,360
HOUSEHOLD GROWTH							
2022 Total number of households (year end 2022 estimates)	62,974	24,145	6,762	11,843	105,724	25,626	1,648,840
2027 Total number of households	69,552	25,330	6,969	12,458	114,309	28,239	1,807,890
2032 Total number of households	76,842	26,641	7,199	13,125	123,806	30,995	1,982,650
PROJECTIONS							
Annual population growth in the period: 2022 to 2027	0.76%	0.75%	1.82%	0.35%	0.81%	0.72%	0.98%
Annual household growth in the period: 2022 to 2027	1.08%	1.03%	1.91%	0.76%	1.09%	1.17%	1.21%
Annual population growth in the period: 2027 to 2032	0.67%	0.59%	1.85%	0.21%	0.71%	0.68%	0.93%
Annual household growth in the period: 2027 to 2032	0.99%	0.89%	1.92%	0.62%	1.00%	1.10%	1.14%

Figure 3.4

RETAIL TRADE AREA POPULATION GROWTH RATES

(Source: Manifold Data Mining 2022, FBM)



295,079

TOTAL TRADE AREA POPULATION 2022

3.2
POPULATION PROJECTIONS

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

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

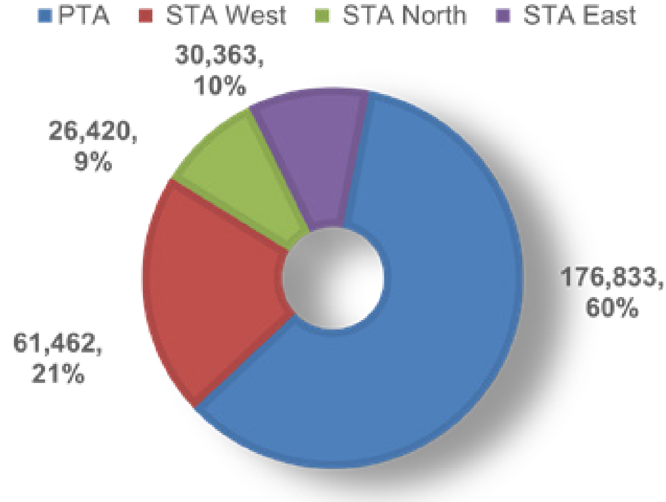
It is recognized however that the Province of Alberta does have straight-line projections to the year 2046 for Census Divisions including Grande Prairie, but these cannot be correlated with the specificity of the trade areas used in this study.

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

Table 3.1 provides a summary 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.

The Total Trade Area population is estimated at over 295,000 as of year end 2022.

Figure 3.5
RETAIL TRADE AREA POPULATION BREAKDOWN
(Source: Manifold Data Mining 2022, FBM)



176,833

PRIMARY TRADE AREA POPULATION 2022

Within the Total Trade Area, the Total Primary Trade Area (PTA), which includes the City of Grande Prairie, is estimated to be well over 176,000 (60% of Total Trade Area as shown in Figure 3.5) and is forecast to grow by over 13,000 by 2032 (**Table 3.1**).

The City of Grande Prairie, on its own, has a population estimated by Manifold Data Mining at over 67,000 for year end 2022.

Over the Statistics Canada Census period 2016 to 2021, the City of Grande Prairie grew by 975 residents from 63,166 to 64,141, which is a population percentage growth of 1.5%. This is slightly slower than the previous census period of 2011 to 2016 that saw 3.7% growth.

Forecasts provided by Manifold Data Mining Inc. suggest that the City's population could reach just over 72,000 by 2032, growing at an average annual growth rate of 0.68%, which is decelerated from the 2019 numbers that projected a 2.4% average annual rate.

Figure 3.4 illustrates the strong and dominant growth forecasts for the City of Grande Prairie compared to the other retail Trade Areas, as well as compared to the Provincial forecasts. It can be seen that the Trade Area's future population growth will be driven by the Secondary Trade Area (STA) North, projected to grow approximately three times faster than the PTA and STA West between 2027 and 2032, and almost nine times faster than the STA East over the same time frame.

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

34.1

MEDIAN AGE IN CITY OF GRANDE PRAIRIE

(38.5 ALBERTA MEDIAN)

Grande Prairie was impacted by low oil prices and saw net outflows of migrants between 2016 and 2017. However, because of its economic diversity and the up-tick in conventional drilling, Grande Prairie should see its migration levels recover faster than other oil-dependent regions in the province. This will be important for providing the necessary labour force to support continued retail development and the service and hospitality sectors overall.

3.3
AGE PROFILE

A summary of the current age profile, as documented in **Table 3.2 & Figure 3.6** reveals a growing younger age demographic comprised of families and young adults entering their higher income earning years, with a median age of 34.1 years in the City of Grande Prairie and 36.4 in the Total Trade Area. The STA North has a notably much younger median age than any of the other trade areas at 27.5 years.

Compared to the Provincial average of 38.5, the City of 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**).

Figure 3.6 reveals that 26% of the populations in the PTA and STAs West and East are under the age of 20, while 39% of STA North is under the age of 20. The breakdown for age 20 to 40 is roughly equivalent to the Provincial average, as is the case for ages 40 and above, with the STA North being the only one that skews generally younger that the Province.

The age 20 to 40 cohort represents the family building stage as well as the higher income earning stage. A strong and young family demographic profile is a critical prerequisite for many retailers looking at entering a market or establishing another location in an existing market.

Accordingly, with almost exactly 52,850 people in the Primary Trade Area in the 25 to 44 year old age bracket, retail spending on discretionary items such as Automobiles and Recreational Vehicles/Motorsports, Fashion, House & Home, Food & Beverage (away from home), Sporting Goods, and Entertainment & Leisure is expected to be remain healthy.

While projects such as Westgate, Gateway, and Prairie Mall continue to position/reposition themselves for these markets, these consumer segments are also becoming increasingly savvy and socially aware of the role that supporting local business has in fostering a sense of place, as well as the role that e-commerce can have on their purchasing patterns.

A citywide retail study of this nature must realize the role that all retail formats play in the establishment and evolution of a complete community. Some retail nodes will not compete with larger retail centres with branded tenants, 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.

Table 3.2

TRADE AREA POPULATION AGE BREAKDOWN

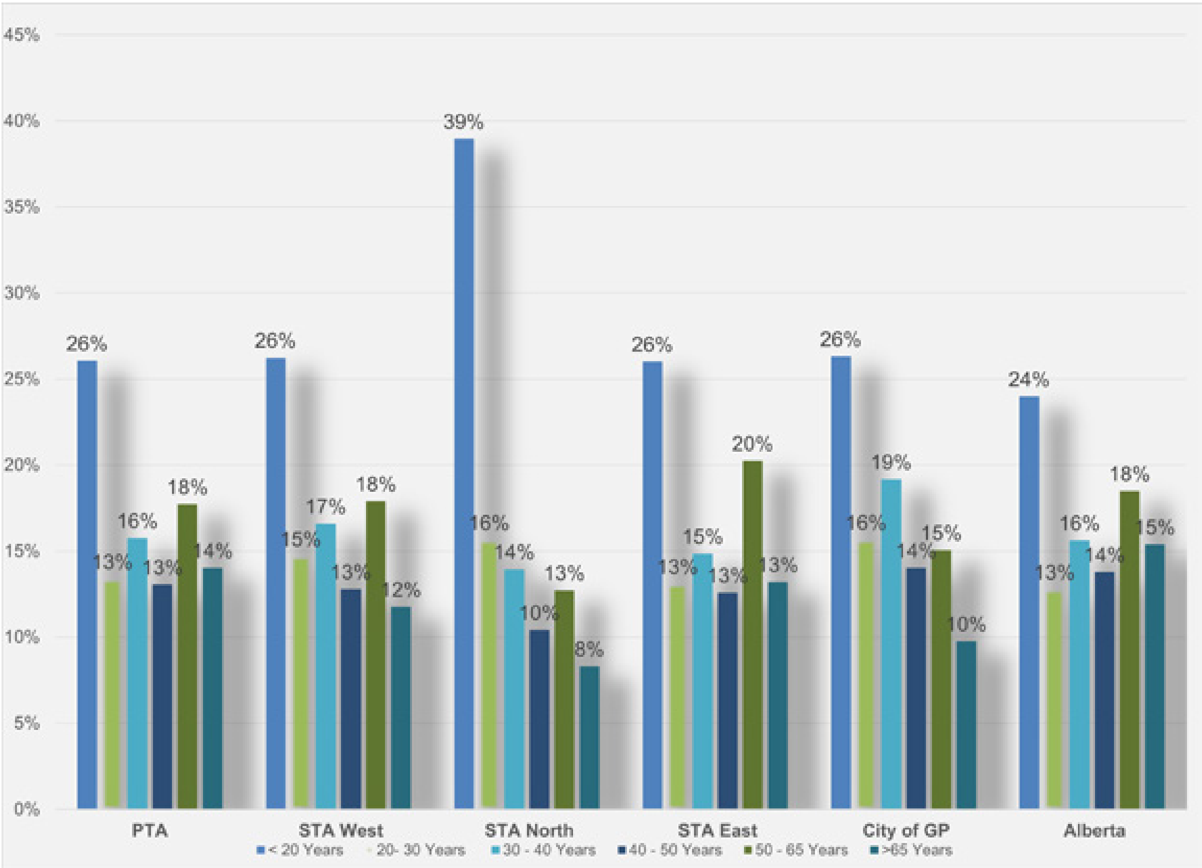
(Source: Manifold Data Mining 2022)

Attribute	GP - PTA	GP - STA West	GP - STA North	GP - STA East	GP - Total Trade Area	INDEX Benchmark Grande Prairie (CMA/CA,AB	Alberta
Population							
POPULATION AGE GROUP							
Total population by age groups	176,833	61,462	26,420	30,363	295,079	67,202	4,491,760
0-4	11,104	4,324	2,854	1,895	20,177	4,671	262,651
5-9	11,911	3,982	2,771	2,022	20,686	4,630	273,812
10-14	11,764	3,867	2,522	2,081	20,234	4,387	277,399
15-19	11,312	3,961	2,144	1,902	19,319	4,000	262,649
20-24	10,908	4,169	2,010	1,884	18,970	4,511	272,895
25-29	12,759	4,867	2,123	2,093	21,842	6,009	300,283
30-34	13,859	5,202	2,045	2,199	23,305	6,519	342,593
35-39	13,985	4,996	1,644	2,310	22,935	6,365	358,699
40-44	12,246	4,204	1,410	1,990	19,850	5,173	328,417
45-49	10,825	3,658	1,341	1,830	17,654	4,256	291,023
50-54	9,892	3,529	1,149	1,873	16,444	3,463	272,944
55-59	10,754	3,769	1,193	2,141	17,857	3,440	277,912
60-64	10,694	3,708	1,021	2,134	17,556	3,211	279,419
65-69	8,721	2,948	814	1,688	14,172	2,514	236,564
70-74	6,027	1,865	523	1,037	9,452	1,581	175,730
75-79	4,228	1,135	360	728	6,452	1,050	121,267
80-84	2,762	728	257	329	4,076	654	77,081
85 and over	3,081	551	240	227	4,100	768	80,421
Median age of total population	37.70	36.00	27.50	38.00	36.40	34.10	38.50
Average age of total population	38.10	36.80	30.60	38.10	37.10	35.40	39.40

Figure 3.6

TRADE AREA POPULATION AGE BREAKDOWN

(Source: Manifold Data Mining 2022, FBM)



27%

PERCENTAGE OF CITY'S HOUSEHOLDS EARNING OVER $125,000 PER YEAR (COMPARED TO A 21% ALBERTA AVERAGE)

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

3.4
INCOME PROFILE

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

A summary of the current average Household Income in the Retail Trade Area, as documented in **Table 3.3 and Figure 3.7** reveals an average Household Income in 2022 estimated at just over $144,000 in the City of Grande Prairie, which is slightly below the Provincial average ($153,772). The Total Trade Area average household income is slightly lower than the City's, estimated at just over $143,000.

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

Figure 3.7 shows a valuable trend whereby 27% of the households in the City earn over $125,000, which is 6% higher than the Provincial average. Since 2018, both the Province and City saw the percentage earning above $125,000 drop (it was 42% for the city in 2018, which was 5% higher than the Province's 37% at the time.)

This 2022 update, shows changes in earnings in the City are consistent with Provincial trends.

Table 3.3

TRADE AREA AVERAGE HOUSEHOLD INCOME BREAKDOWN

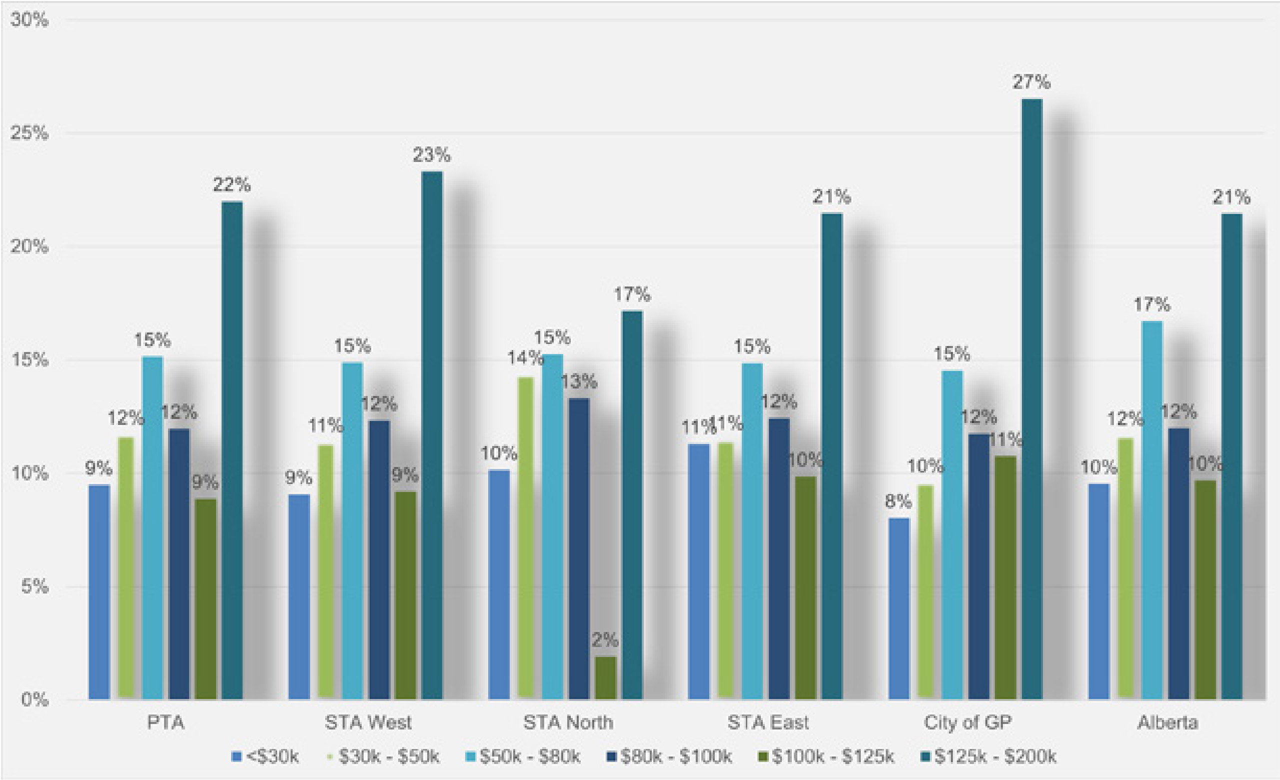
(Source: Manifold Data Mining 2022, FBM)

Attribute	GP - PTA	GP - STA West	GP - STA North	GP - STA East	GP - Total Trade Area	INDEX Benchmark Grande Prairie (CMA/CA,AB	Alberta
Household Income							
HOUSEHOLD INCOME							
All private households with income	66,463	24,432	7,644	11,529	110,067	25,968	1,711,590
Under $5,000	309	164	65	143	681	122	13,702
$5,000 to $9,999	552	219	73	125	969	228	15,819
$10,000 to $14,999	734	274	115	176	1,299	229	18,365
$15,000 to $19,999	1,083	455	143	213	1,894	315	28,174
$20,000 to $24,999	1,812	548	168	303	2,830	631	43,424
$25,000 to $29,999	1,812	556	212	343	2,922	558	43,685
$30,000 to $34,999	1,844	673	246	323	3,086	551	46,038
$35,000 to $39,999	1,880	644	274	320	3,119	609	49,721
$40,000 to $44,999	1,986	676	281	339	3,282	657	51,051
$45,000 to $49,999	2,075	783	297	340	3,494	669	52,941
$50,000 to $59,999	2,831	1,013	329	546	4,719	1,060	83,182
$60,000 to $69,999	3,480	1,233	368	556	5,636	1,319	99,334
$70,000 to $79,999	3,740	1,388	469	613	6,210	1,395	103,443
$80,000 to $89,999	3,949	1,473	494	690	6,606	1,501	103,184
$90,000 to $99,999	4,002	1,538	524	742	6,806	1,550	101,887
$100,000 and over	34,374	12,794	3,588	5,757	56,513	14,572	857,641
$100,000 to $124,999	5,897	2,245	585	1,135	9,863	2,792	165,831
$125,000 to $149,999	6,905	2,715	638	1,201	11,459	3,229	171,141
$150,000 to $199,999	7,709	2,979	673	1,274	12,635	3,655	195,959
$200,000 and over	13,863	4,855	1,692	2,147	22,557	4,897	324,709
$200,000 to $249,999	7,582	2,686	938	1,157	12,363	2,671	156,493
$250,000 to $299,999	2,396	836	290	374	3,897	849	60,788
$300,000 and over	3,885	1,333	464	616	6,298	1,376	107,414
Average household income $	$147,273	$139,064	$123,721	$139,708	$143,023	$144,053	$153,772
Median household income $	$120,527	$120,511	$105,702	$116,665	$119,089	$123,727	$112,790

Figure 3.7

TRADE AREA AVERAGE HOUSEHOLD INCOME BREAKDOWN

(Source: Manifold Data Mining 2022, FBM)



$5.1 Billion

TOTAL TRADE AREA RETAIL SPENDING IN 2022 (including Automotive)

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.

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

3.5 RETAIL SPENDING PROFILE

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

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

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

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

The initial task involved developing an understanding of how each of the delineated Trade Area residents spend their shopping and leisure dollars at a household level for each of the merchandise/spending categories prepared by FBM. 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 $5.1 Billion in retail spending for year end 2022 (refer to **Table 3.4**).

What is most compelling about the Trade Area spending (**Figure 3.8**) is that the City of Grande Prairie's residents only account for 25% of that total spending catchment. This suggests significant market potential within a 2-hour drive which retailers have proven an ability to tap into. This is a slightly larger share than in the 2019 analysis (which was 24%) but still quite low.

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

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

Table 3.4

TRADE AREA RETAIL SPENDING

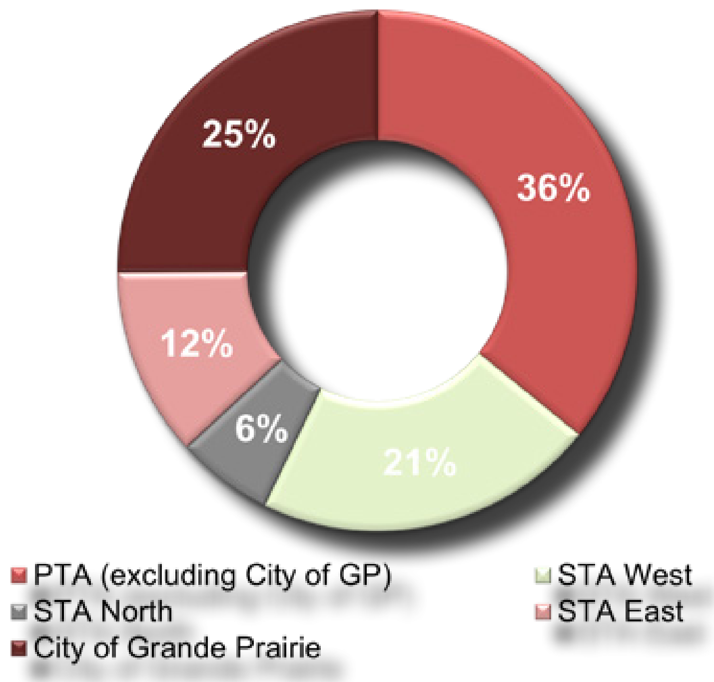
(Source: Manifold Data Mining 2022 and FBM)

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
	2022						
Grocery, Convenience & Specialty Foods	$441,636,244	$744,889,407	$269,293,628	$70,001,725	$140,029,820	$303,253,164	$1,224,214,580
Pharmacy	$48,890,961	$75,474,169	$28,079,959	$5,993,871	$12,570,300	$26,583,208	$122,118,298
Alcohol, Tobacco & Cannabis	$62,304,616	$103,941,100	$38,829,904	$10,432,848	$20,017,992	$41,636,484	$173,221,844
Personal Services	$61,949,375	$101,770,411	$37,796,919	$9,386,148	$19,139,920	$39,821,036	$168,093,397
Fashion & Accessories	$124,039,915	$220,260,394	$78,566,937	$23,248,334	$41,998,791	$96,220,479	$364,074,455
Jewelry	$9,811,060	$17,334,469	$7,140,411	$1,770,330	$3,157,237	$7,523,409	$29,402,447
Health & Beauty	$25,223,381	$42,896,377	$14,215,852	$5,113,776	$8,846,579	$17,672,997	$71,072,584
Furniture & Décor	$48,244,536	$85,401,954	$33,051,520	$8,206,264	$15,465,804	$37,157,418	$142,125,542
Electronics & Appliances	$63,271,521	$108,097,673	$34,026,609	$10,582,202	$20,988,947	$44,826,152	$173,695,432
Home Improvement & Gardening	$99,259,330	$158,620,832	$69,127,579	$15,631,079	$29,681,587	$59,361,501	$273,061,078
Books, Media & Computers	$26,761,101	$45,578,837	$18,952,231	$4,145,465	$8,448,821	$18,817,736	$77,125,354
Sporting Goods	$32,205,427	$59,290,777	$14,029,614	$6,300,227	$11,544,388	$27,085,349	$91,165,006
Toys & Hobbies	$29,347,360	$50,282,598	$17,629,882	$5,564,835	$10,370,098	$20,935,238	$83,847,413
Specialty Retail	$41,462,035	$67,504,534	$28,389,742	$6,281,238	$12,505,159	$26,042,499	$114,680,673
Quick Service F&B	$100,605,071	$155,979,167	$50,827,905	$16,428,982	$33,768,988	$55,374,096	$257,005,042
Restaurants & Pubs	$114,134,952	$198,861,375	$70,003,671	$19,610,963	$38,107,328	$84,726,424	$326,583,337
Arts & Entertainment	$10,723,187	$18,526,919	$4,279,267	$1,783,035	$3,644,584	$7,803,732	$28,233,805
Fitness & Leisure	$19,513,430	$34,990,433	$11,901,457	$3,051,062	$6,376,686	$15,477,002	$56,319,637
Auto Parts & Accessories	$29,726,176	$51,594,661	$17,377,929	$5,147,917	$9,904,005	$21,868,485	$84,024,513
Auto/RV/Motorsports Dealerships	$343,434,712	$610,966,821	$178,713,081	$59,580,658	$123,331,107	$267,532,109	$972,591,667
Auto Fuel	$102,401,617	$166,746,965	$68,159,645	$16,787,341	$32,638,479	$64,345,348	$284,332,430
TOTAL RETAIL CATEGORIES ONLY	**$1,834,946,007**	**$3,119,009,874**	**$1,090,393,741**	**$305,048,301**	**$602,536,620**	**$1,284,063,867**	**$5,116,988,535**

Figure 3.8

TRADE AREA RETAIL SPENDING SUMMARY

(Source: Manifold Data Mining 2022 and FBM)



25%

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

Figure 3.9

TRADE AREA RETAIL SPENDING SUMMARY 2018

(Source: Manifold Data Mining 2022 and FBM)

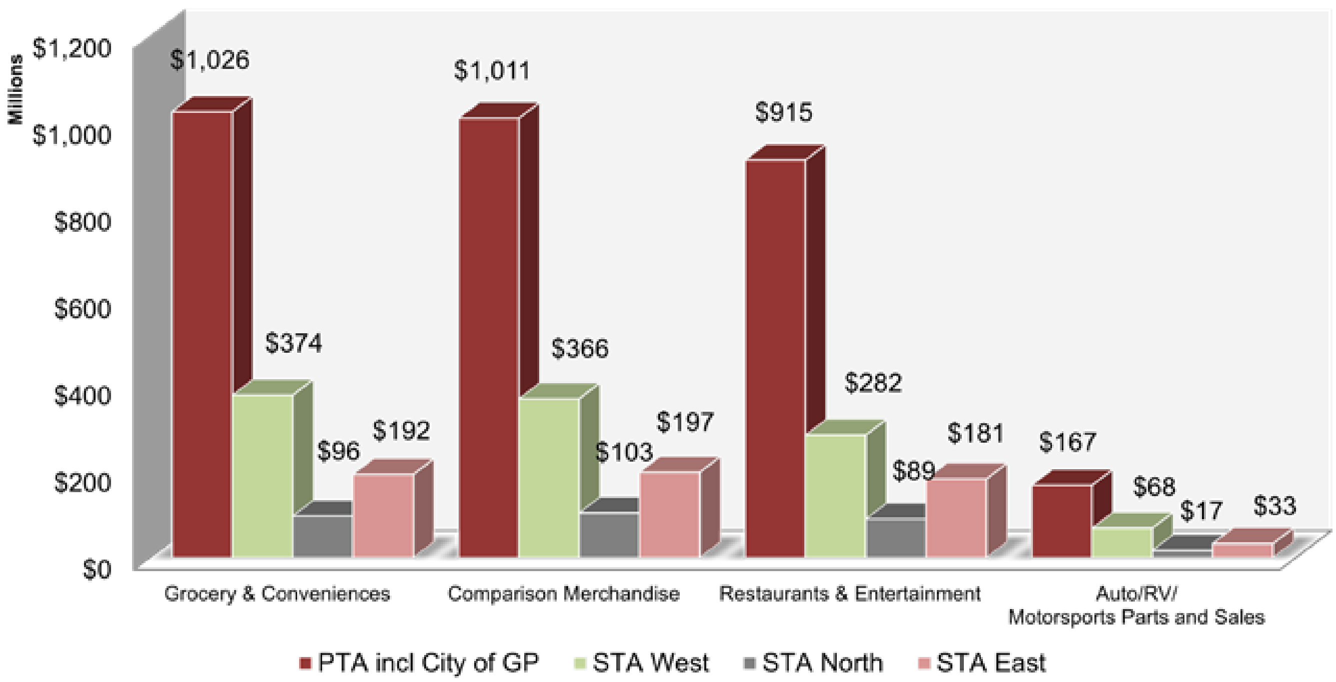
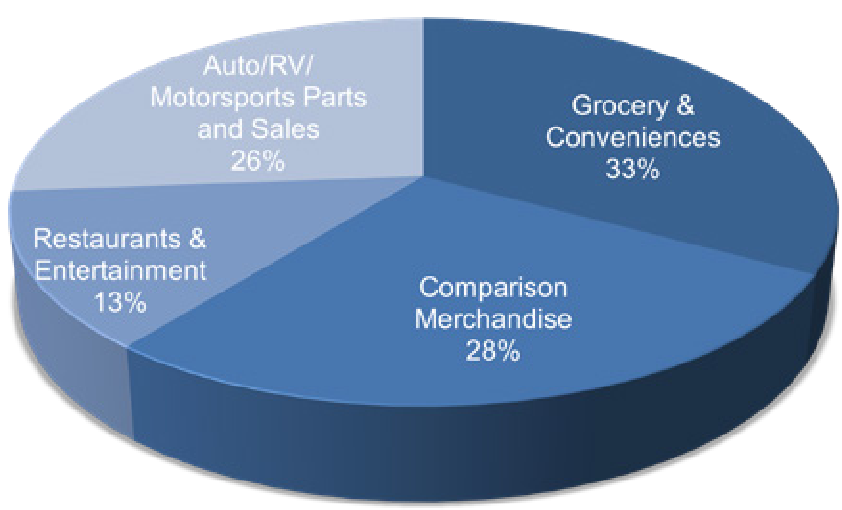


Figure 3.10

TRADE AREA RETAIL SPENDING BY GENERAL CATEGORY

(Source: Manifold Data Mining 2022 and FBM)



COSTCO Grande Prairie including weekday afternoon parking lot containing out-of province license plates.
Photos: FBM

Figure 3.10 shows that retail spending by trade area residents is strongest for Grocery and Convenience, at 33% of total spending. Comparison Merchandise (DSTM) and Auto and auto-related spending are also both fairly strong at 28% and 26% respectively. Though the percentage share of Comparison Merchandise spending fell since 2019 (it was 35%), the combined the strength of these latter two categories reinforces the continued 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.

As shown in **Table 3.4**, the top retail spending categories for the **Total Trade Area** are:

1. *Grocery & Specialty Foods - $1.2 Billion*
2. *Auto/RV/Motorsports - $973 Million*
3. *Fashion & Accessories - $393 Million*
4. *Restaurants & Pubs - $326 Million*
5. *Home Improvement & Gardening - $273 Million*

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

3.6
SUMMARY & IMPLICATIONS

The Trade Area Demographic Profile illustrates a burgeoning resident and consumer market within a 2-hour drive time comprised of households with high income earnings and a young family dynamic: an average age of 35.4 years, which is 4 years younger than the Provincial average. The Total Trade Area contains over 295,000 residents, within which the Primary Trade Area alone contains almost 177,000 residents. The latter attributes are extremely positive and favourable for further retail categories and store types in Grande Prairie and in particular have a degree of correlation with expenditure on many merchandise categories.

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

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

Retail spending by City of Grande Prairie residents alone is estimated at almost $1.3 Billion, while the Total Trade Area within a 2-hour drive time is estimated at over $5.1 Billion. Most significantly is the fact that the City of Grande Prairie is the dominant shopping and service destination for a validated large spending catchment.

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

Prairie Mall Lululemon, Grande Prairie. Photo: FBM

4 RETAIL MARKET SUPPLY

4.1 INTRODUCTION

The dynamics of the overall retail market provides critical indicators as to the performance of 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 FBM's (previously Key Planning Strategies) on-site fieldwork in 2018 and updated in September 2022.

As of 2022, the City's retail vacancy rate was 12.5%, but this drops to 11.8% when excluding "Future" or "Vacant" space either under construction or recently approved for construction (see **Table 4.1**).

A significant component of the overall vacancy picture is in the form of former larger retail spaces (>10,000 sf). These include most notably the following:

- *Former Canadian Tire*
- *Former Sears*
- *Former Fresons*
- *Former Windsor Ford*
- *Doug Marshall Chevrolet*
- *Former Nor-Lan Chrysler/Dodge (& used centre)*
- *Former Den Carvery*
- *Former Nevada Bobs*
- *Former Hansen Ford*

While most of these are the result of the business relocating and expanding in the community, which is a positive, the likelihood of these spaces being occupied by single retail users is limited, requiring redemising of the space or creative adaptive re-use. In the case of the Canadian Tire, restrictive covenants suggest that this may need to be an adaptive non-retail or non-auto reuse. Examples could include an indoor recreation facility such as an indoor bike park, roller rink, or pickle ball facility.

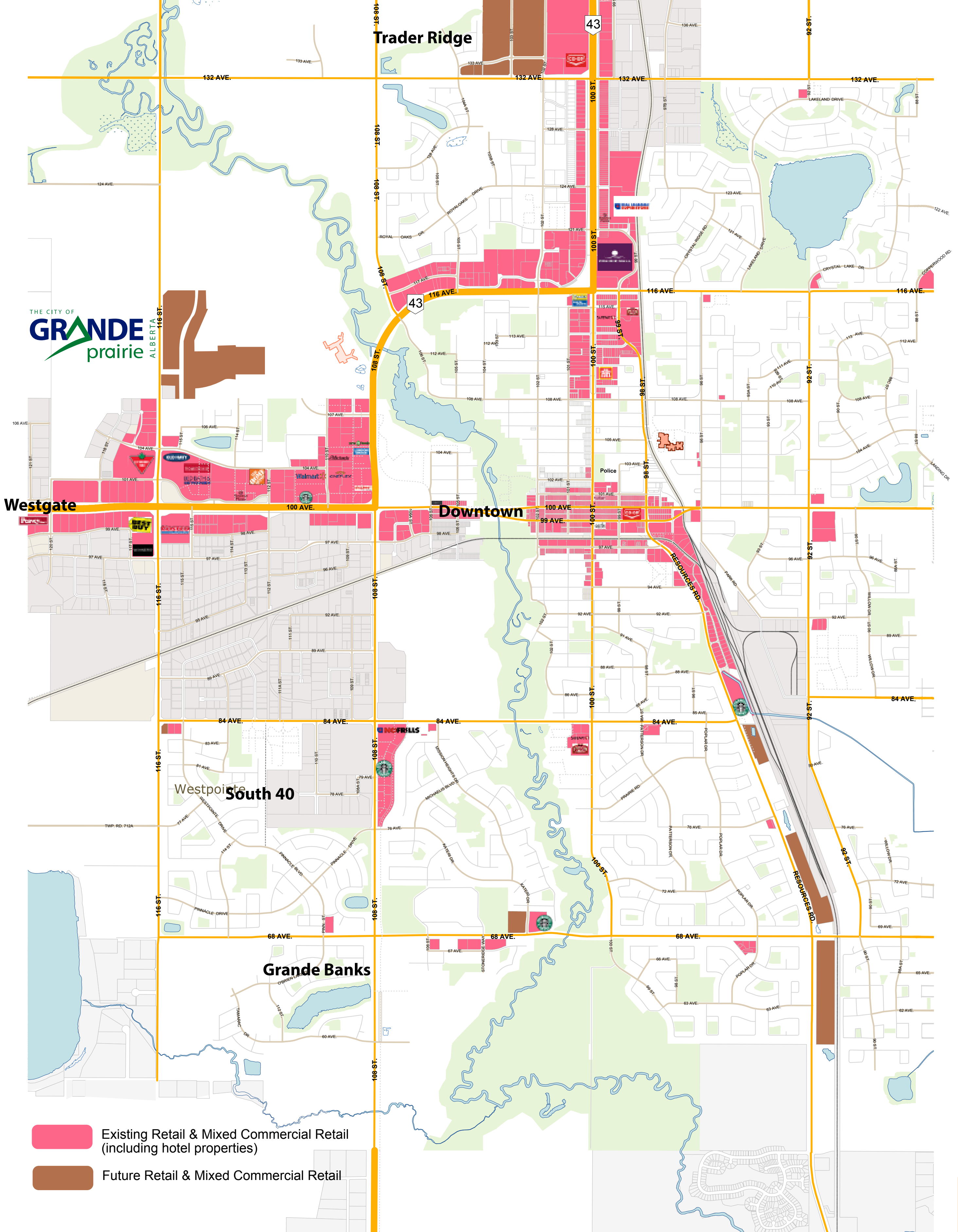


Figure 4.1

CITY OF GRANDE PRAIRIE RETAIL PROJECTS INVENTORY & SUPPLY MAP

(Source: City of Grande Prairie & FBM 2018)

In general, vacancies are highest in the North and West Sectors of the City (296,297 sf and 143,193 sf respectively) where some of the above identified vacancies are located (see **Figure 4.1**).

There are rumors that Bed Bath & Beyond's corporate Bankruptcy and Old Navy's online success may result in their exit from the market, but this remains to be seen. If Bed, Bath & Beyond were to leave the market, the backfilling of a high profile space of that size and location would be highly compatible with a retailer like T&T Supermarket. Overall, the Westgate Centre and Monaco Square projects remain highly attractive for national branded tenants.

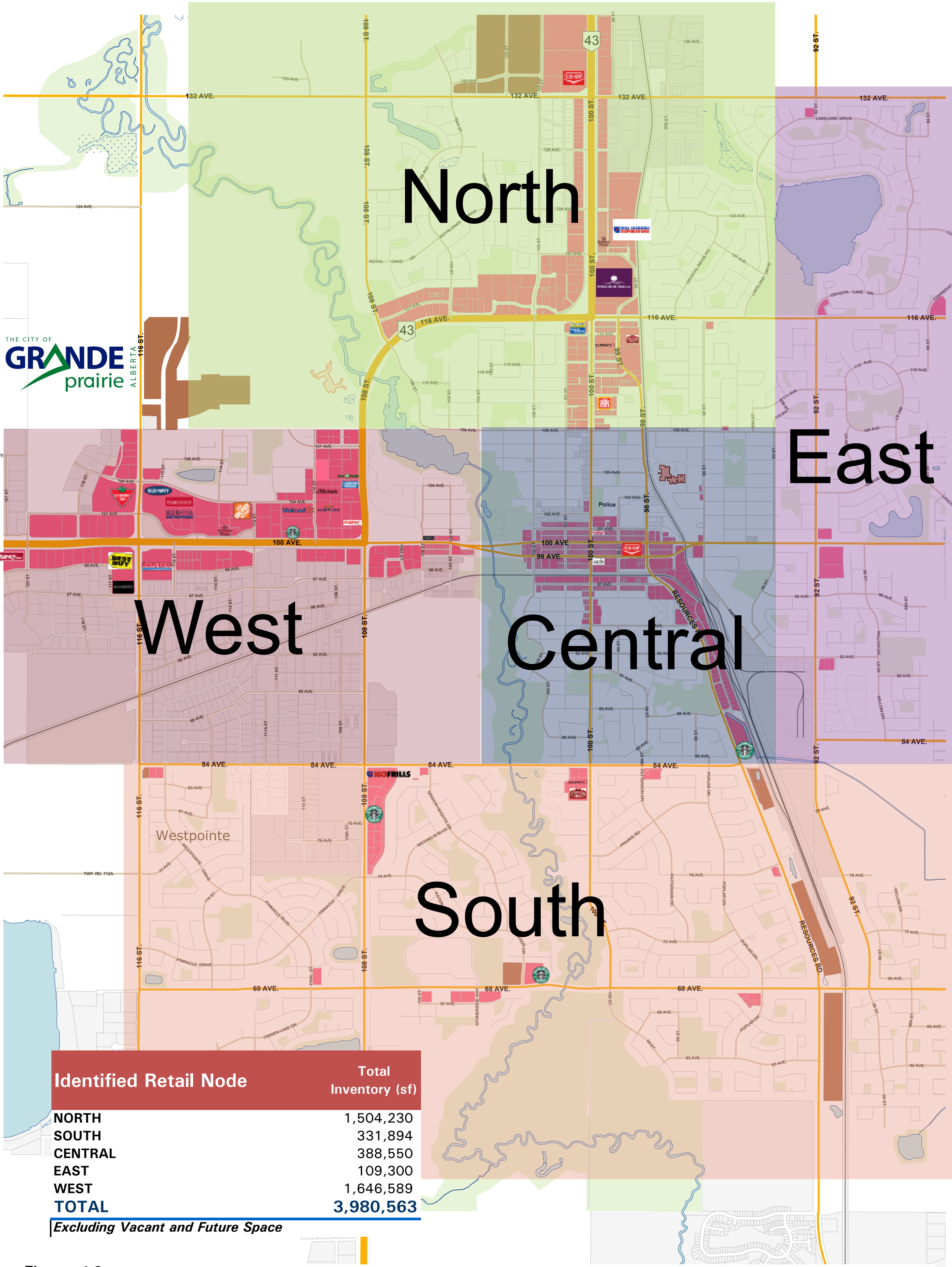
A positive story is the apparent resilience of Downtown Grande Prairie over the past 5 years. As the city invested in major streetscape and infrastructure improvements, many businesses/property owners have taken advantage of the City's storefront improvement program and have taken part in a reinvention of the Downtown. This has resulted in a decline in vacancies and a more animated streetfront for retail. The same has not necessarily been observed for office buildings in the downtown but even then, there are some examples of office users - formerly in older office buildings - taking spaces along the streetfront in the downtown.

Table 4.1

CITY OF GRANDE PRAIRIE RETAIL INVENTORY

(Source: City of Grande Prairie & FBM 2022)

Merchandise Category	Existing Inventory (SF)	Existing Inventory (%)	Number of Stores	% of Number of Stores	Average Store Size
Grocery, Convenience & Specialty Food	633,507	13.40%	60	7.2%	10,558
Pharmacy	87,363	1.85%	10	1.2%	8,736
Alcohol, Tobacco & Cannabis	129,190	2.73%	57	6.9%	2,266
Personal Services	121,028	2.56%	81	9.7%	1,494
Clothing & Apparel	332,751	7.04%	48	5.8%	6,932
Footwear	28,159	0.60%	10	1.2%	2,816
Jewelry & Accessories	43,421	0.92%	15	1.8%	2,895
Health & Beauty	41,688	0.88%	13	1.6%	3,207
Electronics & Appliances	135,666	2.87%	24	2.9%	5,653
Furniture & Decor	288,439	6.10%	27	3.2%	10,683
Home Improvement & Gardening	267,445	5.66%	20	2.4%	13,372
Books, Media & Computers	15,094	0.32%	3	0.4%	5,031
Sporting Goods	122,015	2.58%	7	0.8%	17,431
Toys & Hobbies	48,948	1.04%	6	0.7%	8,158
Specialty Retail	273,164	5.78%	57	6.9%	4,792
Quick Service F&B	215,767	4.57%	130	15.6%	1,660
Full Service Restaurants & Pubs	200,640	4.25%	51	6.1%	3,934
Arts & Entertainment	144,000	3.05%	12	1.4%	12,000
Fitness & Leisure	61,850	1.31%	14	1.7%	4,418
Auto Parts & Accessories	173,918	3.68%	10	1.2%	17,392
Auto/RV/Motorsports Dealership	458,050	9.69%	23	2.8%	19,915
Professional/Medical/Financial Service	158,462	3.35%	49	5.9%	3,234
FUTURE	212,001	0			
VACANT	533,594	11.29%	104	12.5%	5,131
TOTAL	**4,726,158**	**100.00%**	**831**	**100%**	**5,687**



Identified Retail Node	Total Inventory (sf)
NORTH	1,504,230
SOUTH	331,894
CENTRAL	388,550
EAST	109,300
WEST	1,646,589
TOTAL	**3,980,563**

Excluding Vacant and Future Space

Figure 4.2
RETAIL SECTORS
(Source: FBM, 2022)

4.51M sf

CITY OF GRANDE PRAIRIE'S RETAIL INVENTORY
(2022 excluding future and under construction)

4.3
RETAIL DEVELOPMENTS

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

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

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

As Grande Prairie continues to grow and evolve, and new developments become more appropriate for tenants, areas such as 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 and update the previously completed retail inventories, FBM conducted on-the-ground fieldwork in September 2022. This most recent fieldwork included documenting every retail project and node in terms of 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 tables so that a direct comparison could be made. In some cases where retail data was not available, store sizes were estimated using leasing plans, developer websites, and satellite mapping measurements.

Over the last few years, the majority of new retail development has occurred in the south at the South 40 Centre, north at Trade Ridge, and east at Cobblestone Lane. The west side also continues to be active in adding new commercial opportunities such as the Canadian Tire and other businesses at Westgate Centre.

As documented in **Tables 4.1 and 4.2**, the City of Grande Prairie has an estimated retail floorspace of approximately 4.51 million square feet (sf). This retail floorspace is comprised of approximately +/- 831 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.

Figure 4.3

REPRESENTATIVE CITY RETAIL IMAGERY & MAJOR PROJECT BROCHURE PROFILES

Source: Photos by FBM

SITE PLAN

CUSHMAN & WAKEFIELD
Edmonton

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

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

Dane Phaneuf
Associate
780 701 1966
dane.phaneuf@cwedm.com

Jennifer Baker
Team Coordinator
780 701 3284
jennifer.baker@cwedm.com

Prairie Ridge Centre
For Lease
12429 – 99th Street, Grande Prairie, AB

RETAIL UNITS FROM 1,000 SF UP TO 94,000 SF AVAILABLE NEAR PRAIRIE MALL

- Located near Prairie Mall Shopping Centre and shadow anchored by Real Canadian Superstore
- Occupied by a variety of tenants including Ricky's All Day Grill, Tim Hortons, Harley Davidson Motorcycle, and more
- Areas For Lease: 1,020 SF up to 94,000 SF
- Lease Rate: Market
- Zoning: CA - Arterial Commercial District

ARTIS REIT JLL

MONACO SQUARE

GRANDE PRAIRIE, ALBERTA

PRAIRIE MALL

Grande Prairie, Alberta

Prairie Mall, based in Grande Prairie, Alberta, is the largest indoor shopping centre in northwestern Alberta, serving the immediate region as well as northeastern British Columbia. Servicing a trade area of over 230,000 people, Prairie Mall has 100 retailers with local, national, and international brands. At over $624 per square foot consistently in revenues, Prairie Mall is one of the highest performing shopping centres in Western Canada. With a market of over 80% under the age of 45, and one of the most prosperous regions of Canada due to strong primary industries such as oil and gas, the centre is well-positioned for continued growth and diversity.

$
$624 PSF

NEW TO CENTRE

Eclipse
Laura/Laura Plus
Lululemon
Mountain Warehouse
Purdys Chocolatier
Quarks
Saje
Sephora
Warehouse One

CENTRE PROFILE

Total Square Feet	278,255
Total SF of CRU Tenants	185,041
Number of Stores/Services	100
Number of Levels	1
Number of Parking Spaces	1,560

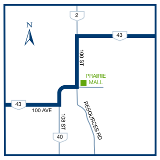
MAJOR TENANTS

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

MARKET DEMOGRAPHICS

Primary Trade Area	
Population	107,741
Number of Households	38,462
Average Household Income	$143,375
Secondary Trade Area	
Population	123,161
Number of Households	45,496
Average Household Income	$134,934
Traffic	
Annual Pedestrian Traffic	3,250,000

Source:
Market Demographics: Environics Analytics, DemoStats Trends, 2022.



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

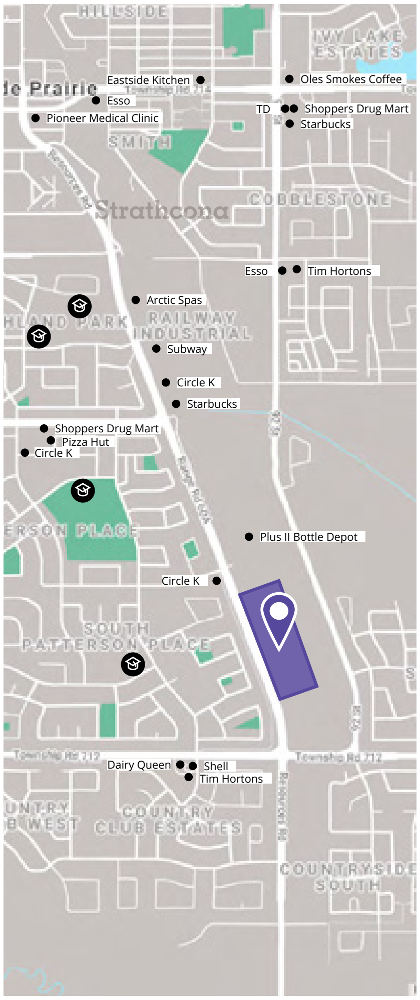
LEASING INQUIRIES
55 City Centre Drive, Suite 800, Mississauga, ON L5B 1M3
Phone 905-281-3800 Toll Free 1-800-928-6255
leasing@morguard.com
morguard.com

Morguard
Real Estate Potential. Realized.

New Retail Centre

Resources Road between 68 Avenue & 76 Avenue, Grande Prairie, AB

Site Size	5.68 (Phase 1)
Zoning	CA - Arterial Commercial



>1.8 million sf

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

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 (**Figure 4.2**). Each Sector was determined based on geographic and spatial factors such as road networks, patterns of residential development, and types of inventory.

The result was the following Sectors totaling 4.73 million sf:

- West Sector 1.85 million sf
- North Sector 1.83 million sf
- South Sector 509,500 sf
- Central Sector 424,500 sf
- East Sector 109,000 sf

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

Table 4.2

RETAIL INVENTORY BY CATEGORY & SECTOR

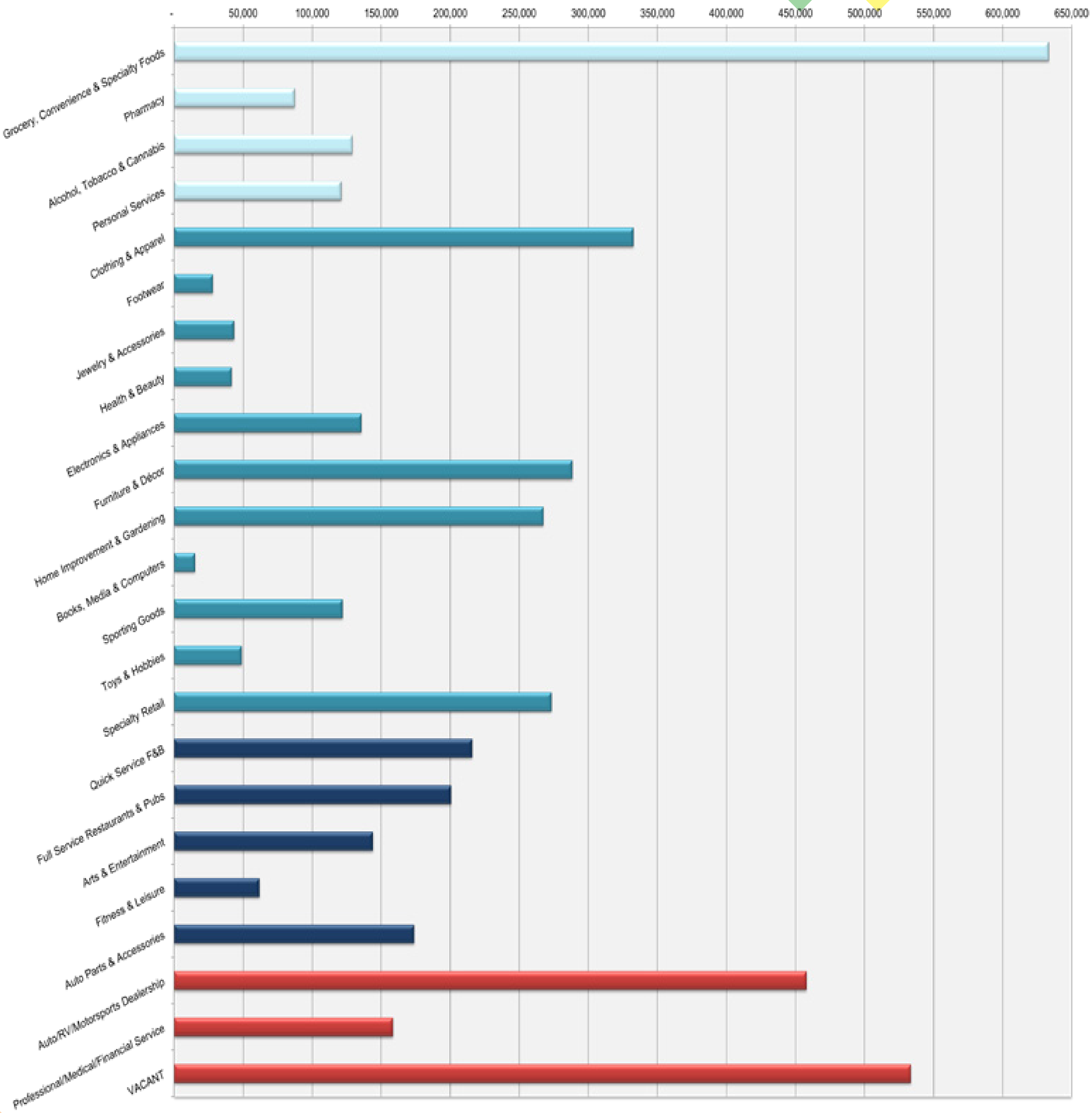
(Source: FBM 2022)

Merchandise Category	NORTH	SOUTH	CENTRAL	EAST	WEST	TOTAL (sf)
Grocery, Convenience & Specialty Food	212,427	116,750	58,000	44,550	201,780	**633,507**
Pharmacy	22,844	30,641	1,500	15,000	17,378	**87,363**
Alcohol, Tobacco & Cannabis	28,768	46,367	12,550	12,000	29,505	**129,190**
Personal Services	49,891	10,650	39,950	7,000	13,537	**121,028**
Fashion, Apparel & Footwear	185,038	1,000	15,700	0	159,172	**360,910**
Jewelry & Accessories	32,358	0	2,750	0	8,313	**43,421**
Health & Beauty	21,274	1,000	1,250	0	18,164	**41,688**
Electronics & Appliances	32,096	0	19,050	0	84,520	**135,666**
Furniture & Décor	108,181	0	28,100	0	152,158	**288,439**
Home Improvement & Gardening	69,000	0	1,000	0	197,445	**267,445**
Books, Media & Computers	8,879	0	2,000	0	4,215	**15,094**
Sporting Goods	65,307	0	12,000	0	44,708	**122,015**
Toys & Hobbies	6,796	0	12,500	0	29,652	**48,948**
Specialty Retail	70,085	10,250	41,600	4,500	146,729	**273,164**
Full Service Restaurants & Pubs	57,931	26,400	57,700	0	58,609	**200,640**
Quick Service F&B	56,018	53,536	17,850	16,000	72,363	**215,767**
Arts & Entertainment	13,000	0	21,000	0	110,000	**144,000**
Fitness & Leisure	13,750	16,000	5,100	5,000	22,000	**61,850**
Auto Parts & Accessories	66,700	0	0	0	107,218	**173,918**
Auto/RV/Motorsports Dealership	353,250	0	0	0	104,800	**458,050**
Professional/Medical/Financial Service	30,637	19,300	38,950	5,250	64,325	**158,462**
FUTURE	31,791	119,395	0	0	60,815	**212,001**
VACANT	296,297	58,208	35,896	0	143,193	**533,594**
TOTAL	**1,832,318**	**509,497**	**424,446**	**109,300**	**1,850,597**	**4,726,158**

Figure 4.4

CITY OF GRANDE PRAIRIE RETAIL INVENTORY FLOORSPACE BY CATEGORY

(Source: FBM 2022)



360,910 sf

AMOUNT OF FASHION, APPAREL & FOOTWEAR FLOORSPACE IN CITY

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

It is worth noting, however, that because a specific Sector may not have any retail space, this does not suggest that there is a void, but rather could be simply a reflection of the area being more local in its trade area. This is particularly the case for the East Sector, which provides the basic day-to-day needs for its local trade area residents with its top categories being Grocery, Convenience & Specialty Foods (40.8% of total East Sector retail floorspace); Quick-service restaurants (14.6%), and Pharmacy (13.7%).

Conversely, the North Sector has a wide array of all types of shops and services serving a wider range of needs and a larger consumer base. Its largest retail categories are Auto/RV/Motorsports Dealerships (353,250 sf -19.3% of total North Sector retail floorspace); Grocery, Convenience & Specialty Foods (212,427 sf - 11.6%); and Fashion, Apparel & Footwear (185,038 sf -10.1%) (**Table 4.2**).

The continuing progress of the **Shops of Trader Ridge** in the North Sector will further bolster the potential to become an auto dealership hub, premised around the recently opened Windsor Ford, the largest Ford dealership in Canada. Additionally, the future availability of approximately 31,000+ sf of new retail space will provide ample opportunities to attract new and additional retail fronting one of the most highly visible and travelled routes in Northern Alberta, where traffic counts exceed 32,000 vehicles per day. Recent CRU tenant announcements include Starbucks, Bone n Biscuit, Popeye's, and Panago, as well as a dentist.

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

The West Sector, similar to the North, contains a sampling of every retail category. It's top category is also Grocery (etc.) at 10.9%, followed closely by Home Improvement & Gardening (10.7%), and then Fashion, Apparel & Footwear (8.6%). It differs in how it has no clearly dominant category, as the North does with Auto dealers.

The South Sector's largest retail category is Grocery, Convenience & Specialty Foods which currently accounts for 22.9% 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. Another indicator of its potential for continued retail growth is how Future retail floorspace comprises 23.4% of the total retail floorspace in the South Sector.

The current vacancy in the South Sector (58,208 sf - 11.4%) includes the Forum Properties grocery anchored development along Resources Rd & 76th as well as the next stage of construction for CRU space at Railtown. These projects are not actively built, but are actively pre-leasing and are included in the vacancy figure for this study.

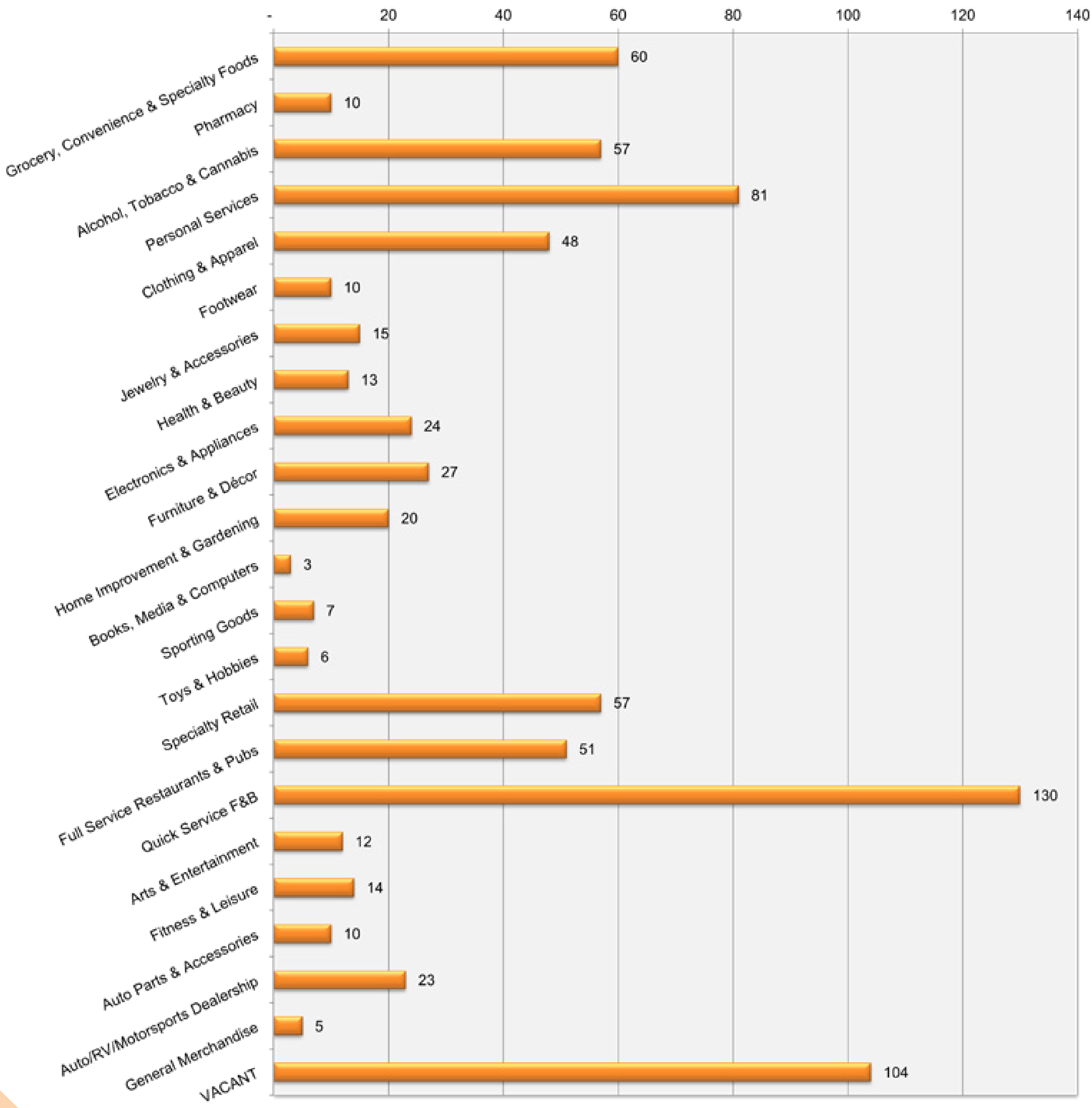
The top two categories in Central Sector are nearly equal in their share of space - 13.7% occupied by Grocery, Convenience, & Specialty Food and 13.6% by Full Service Restaurants/Pubs. Personal Services' share of total Central floorspace has decreased since 2019, now occupying 9.4% compared to 17% in the 2019 inventory. The amount of space occupied by Personal Services in Central Sector remains significant, however, as it is still the third most prominent retail category in Central. 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.

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, Walmart and London Drugs, whose inventory often comprises many retail categories. For the purposes of counting the number of stores, General Merchandiser was added).

(Source: FBM 2022)



+/-727

NUMBER OF RETAIL STORES IN CITY OF GRANDE PRAIRIE

(including vacant ground level spaces)

The Co-op Grocery downtown also represents a significant portion 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 the City of 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/Conv./Specialty Food 633,500 sf*
2. *Auto/RV/Motorsports 458,000 sf*
3. *Fashion/Apparel/Footwear 361,000 sf*
4. *Furniture & Decor 288,500 sf*
5. *Specialty Retail 273,000 sf*

Newer developments/redevelopments such as Westgate, Vision West, Shops of Trader Ridge, South 40, and 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 Books, Media & Computers (15,000 sf); Health & Beauty (41,700 sf), and Jewelry & Accessories (43,400 sf). Together these three categories make up only 2.1% of Grande Prairie's total retail inventory. Each of these categories could be considered under-served yet conducive to Grande Prairie's market profile.

Retail industry-wide, the book industry continues to struggle in the face of on-line competition. Nonetheless, a store such as Indigo could represent a strong addition to the city's retail inventory. The repositioning of Indigo as a "Cultural Department Store" has reinvigorated the reading retail landscape and should be a tenant actively pursued at Westgate.

4.7
RETAIL INVENTORY BY CLASS

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

Table 4.3
RETAIL INVENTORY SUMMARY BY SECTOR & CLASS

(Source: FBM 2022)

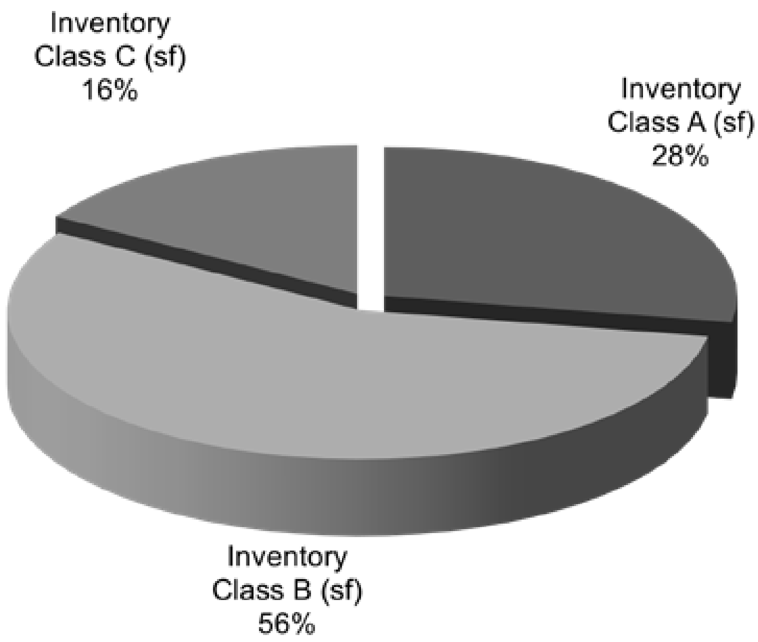
Identified Retail Node	Total Inventory (sf)	Inventory Class A (sf)	Inventory Class B (sf)	Inventory Class C (sf)
NORTH	1,504,230	443,399	739,292	321,539
SOUTH	331,894	68,150	246,544	17,200
CENTRAL	388,550	25,800	123,650	239,100
EAST	109,300	17,000	86,750	5,550
WEST	1,646,589	553,029	1,027,943	65,617
TOTAL	**3,980,563**	**1,107,378**	**2,224,179**	**649,006**

Excluding Vacant and Future Space

Figure 4.6

CITY OF GRANDE PRAIRIE RETAIL INVENTORY BY CLASS OF RETAIL SPACE

(Source: FBM 2022)



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.*

67 sf

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

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 position to tap into the regional Trade Area market.

The analysis shown in **Table 4.3 and Figure 4.6** 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 or local store (refer to notation below **Figure 4.6**).

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 4.6**, the calibre of retail in Grande Prairie can best be classified as average in that the majority of retail spaces fall within the B Class quality (56%). Classes C and A account for 16% and 28% respectively of total retail space. Since the original Gap Analysis in 2013, the inventory in the City has continued to shift towards higher quality and newer retail spaces which are critical to attracting tenants to the City.

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

4.8 RETAIL SPACE PER CAPITA

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

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

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 like Grande Prairie, but rather fulfill the demand and needs of their own population base.

In markets that are more remote or removed from a metropolitan region, but are regional in their catchment, such as the City of 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 (4.51 million sf) against the City's population of 67,000 (2022 year end City of Grande Prairie population estimated by Manifold Data Mining), the resulting per capita ratio is just over 67.

This figure in isolation may seem high, but given the remote location relative to the City of Edmonton, the figure further indicates regional catchment Grande Prairie services.

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

4.9 SUMMARY & IMPLICATIONS

The 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.

The resulting inventory of over 4.5 million sf in the City of Grande Prairie validates the regional serving nature and destination appeal of the retail offering. Grande Prairie is more than just a remote local market, but rather a proven regional destination. Vacancies have become a challenge for the City over the past few years, whereby the City has for the last decade punched above its weight and been successful in bringing many of the desired retailers to the market. As a benefactor of its own success, the market has reached a pinnacle that requires a targeted approach moving forward to fine tune the gaps and not overbuild or oversaturate the market.

The city has numerous retail development opportunities ranging from large format Power Centres, a very busy Regional Enclosed Mall, new Community Shopping Centres and Neighbourhood Centres, and traditional Downtown shops and services.

Each of these formats provides a range of potential opportunities for retailers and investors in terms of store sizes, categories, etc.

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

Both the West and North Sectors of the city each have over 1.8 million sf of retail space, making them dominant retail nodes, and each exhibit continued growth dynamics.

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

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

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

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

Prairie Mall Grande Prairie. Photo: FBM

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 they relate 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 dollars per square foot ($/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 of the amount of 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 67,000+ residents could justify.

Accordingly, **Table 5.1** reveals that the City's residents could justify approximately just over 2.77 million sf of retail space, at an overall market share of 75%. Since this study is examining the City of Grande Prairie's retail market, the resulting market shares and demand are viewed as "retained" as part of that 75% of total City of Grande Prairie resident spending. The remaining 25% is likely spent elsewhere and most likely in the City of Edmonton on Destination and Entertainment categories 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 competitor. 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.

TABLE 5.1

CITY OF GRANDE PRAIRIE RETAIL FLOORSPACE DEMAND

Retail Spending by Merchandise Category	2022			
	City of GP Retail Sales Productivity ($psf)	Retained Market Share	Retained Sales $	Floorspace Demand (sf)
Grocery, Convenience & Specialty Foods	$550	90%	$272,927,847	496,232
Pharmacy	$400	90%	$23,924,887	59,812
Alcohol, Tobacco & Cannabis	$500	90%	$37,472,836	74,946
Personal Services	$250	90%	$35,838,932	143,356
Fashion & Accessories	$275	70%	$67,354,335	244,925
Jewelry	$400	70%	$5,266,386	13,166
Health & Beauty	$350	70%	$12,371,098	35,346
Furniture & Décor	$275	70%	$26,010,193	94,583
Electronics & Appliances	$400	45%	$20,171,769	50,429
Home Improvement & Gardening	$225	35%	$20,776,526	92,340
Books, Media & Computers	$200	90%	$16,935,962	84,680
Sporting Goods	$250	45%	$12,188,407	48,754
Toys & Hobbies	$250	60%	$12,561,143	50,245
Specialty Retail	$250	60%	$15,625,500	62,502
Quick Service F&B	$400	50%	$27,687,048	69,218
Restaurants & Pubs	$350	80%	$67,781,139	193,660
Arts & Entertainment	$175	70%	$5,462,612	31,215
Fitness & Leisure	$175	75%	$11,607,752	66,330
Auto Parts & Accessories	$350	90%	$19,681,637	56,233
Auto/RV/Motorsports Dealerships	$400	95%	$254,155,503	635,389
Auto Fuel				
TOTAL RETAIL CATEGORIES ONLY	**$371**	**75%**	**$965,801,511**	**2,603,360**

TABLE 5.2

PTA (EXCLUDING GRANDE PRAIRIE) RETAIL FLOORSPACE DEMAND

Retail Spending by Merchandise Category	2022			
	PTA Retail Sales Productivity ($psf)	Inflow Market Share	Inflow Sales $	Floorspace Demand (sf)
Grocery, Convenience & Specialty Foods	$550	40%	$176,654,497	321,190
Pharmacy	$400	40%	$19,556,384	48,891
Alcohol, Tobacco & Cannabis	$500	40%	$24,921,846	49,844
Personal Services	$250	40%	$24,779,750	99,119
Fashion & Accessories	$275	55%	$68,221,953	248,080
Jewelry	$400	55%	$5,396,083	13,490
Health & Beauty	$350	55%	$13,872,859	39,637
Furniture & Décor	$275	55%	$26,534,495	96,489
Electronics & Appliances	$400	55%	$34,799,337	86,998
Home Improvement & Gardening	$225	40%	$39,703,732	176,461
Books, Media & Computers	$200	40%	$10,704,440	53,522
Sporting Goods	$250	55%	$17,712,985	70,852
Toys & Hobbies	$250	55%	$16,141,048	64,564
Specialty Retail	$250	55%	$22,804,119	91,216
Quick Service F&B	$400	55%	$55,332,789	138,332
Restaurants & Pubs	$350	40%	$45,653,981	130,440
Arts & Entertainment	$175	50%	$5,361,594	30,638
Fitness & Leisure	$175	65%	$12,683,730	72,478
Auto Parts & Accessories	$350	65%	$19,322,014	55,206
Auto/RV/Motorsports Dealerships	$400	40%	$137,373,885	343,435
Auto Fuel				
TOTAL RETAIL CATEGORIES ONLY	**$349**	**42%**	**$777,531,522**	**2,230,882**

This spending, as evidenced in the Trade Area delineation, reaches to northeastern cities and towns of British Columbia, towns in northern Alberta, and is even known to extend up to and including the Northwest Territories .

To account for this spending inflow originating outside of the City of Grande Prairie, FBM uses one Primary and three 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 (109,630 residents; this number is **excluding** the City of Grande Prairie population).

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 2.2 million sf and an estimated market share of 42% 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	2022			
	PTA Incl GP Retail Sales Productivity ($psf)	Inflow & Retained Market Share	Inflow & Retained Sales $	Floorspace Demand (sf)
Grocery, Convenience & Specialty Foods	$550	60%	$449,582,345	817,422
Pharmacy	$400	58%	$43,481,272	108,703
Alcohol, Tobacco & Cannabis	$500	60%	$62,394,682	124,789
Personal Services	$250	60%	$60,618,682	242,475
Fashion & Accessories	$275	62%	$135,576,289	493,005
Jewelry	$400	62%	$10,662,469	26,656
Health & Beauty	$350	61%	$26,243,957	74,983
Furniture & Décor	$275	62%	$52,544,687	191,072
Electronics & Appliances	$400	51%	$54,971,105	137,428
Home Improvement & Gardening	$225	38%	$60,480,258	268,801
Books, Media & Computers	$200	61%	$27,640,403	138,202
Sporting Goods	$250	50%	$29,901,392	119,606
Toys & Hobbies	$250	57%	$28,702,191	114,809
Specialty Retail	$250	57%	$38,429,619	153,718
Quick Service F&B	$400	53%	$83,019,837	207,550
Restaurants & Pubs	$350	57%	$113,435,120	324,100
Arts & Entertainment	$175	58%	$10,824,206	61,853
Fitness & Leisure	$175	69%	$24,291,481	138,808
Auto Parts & Accessories	$350	76%	$39,003,651	111,439
Auto/RV/Motorsports Dealerships	$400	64%	$391,529,388	978,823
Auto Fuel				
TOTAL RETAIL CATEGORIES ONLY	**$361**	**56%**	**$1,743,333,033**	**4,834,242**

TABLE 5.4

STA WEST RETAIL FLOORSPACE DEMAND

Retail Spending by Merchandise Category	2022 STA West Retail Sales Productivity ($psf)	Inflow Market Share	Inflow Sales $	Floorspace Demand (sf)
Grocery, Convenience & Specialty Foods	$550	5%	$13,464,681	24,481
Pharmacy	$400	5%	$1,403,998	3,510
Alcohol, Tobacco & Cannabis	$500	5%	$1,941,495	3,883
Personal Services	$250	5%	$1,889,846	7,559
Fashion & Accessories	$275	25%	$19,641,734	71,424
Jewelry	$400	25%	$1,785,103	4,463
Health & Beauty	$350	25%	$3,553,963	10,154
Furniture & Décor	$275	25%	$8,262,880	30,047
Electronics & Appliances	$400	20%	$6,805,322	17,013
Home Improvement & Gardening	$225	25%	$17,281,895	76,808
Books, Media & Computers	$200	15%	$2,842,835	14,214
Sporting Goods	$250	20%	$2,805,923	11,224
Toys & Hobbies	$250	25%	$4,407,471	17,630
Specialty Retail	$250	25%	$7,097,435	28,390
Quick Service F&B	$400	25%	$12,706,976	31,767
Restaurants & Pubs	$350	10%	$7,000,367	20,001
Arts & Entertainment	$175	15%	$641,890	3,668
Fitness & Leisure	$175	15%	$1,785,219	10,201
Auto Parts & Accessories	$350	5%	$868,896	2,483
Auto/RV/Motorsports Dealerships	$400	5%	$8,935,654	22,339
Auto Fuel				
TOTAL RETAIL CATEGORIES ONLY	**$304**	**11%**	**$125,123,583**	**411,260**

TABLE 5.5

STA EAST RETAIL FLOORSPACE DEMAND

Retail Spending by Merchandise Category	2022 STA East Retail Sales Productivity ($psf)	Inflow Market Share	Inflow Sales $	Floorspace Demand (sf)
Grocery, Convenience & Specialty Foods	$550	10%	$14,002,982	25,460
Pharmacy	$400	10%	$1,257,030	3,143
Alcohol, Tobacco & Cannabis	$500	10%	$2,001,799	4,004
Personal Services	$250	10%	$1,913,992	7,656
Fashion & Accessories	$275	15%	$6,299,819	22,908
Jewelry	$400	15%	$473,586	1,184
Health & Beauty	$350	15%	$1,326,987	3,791
Furniture & Décor	$275	15%	$2,319,871	8,436
Electronics & Appliances	$400	10%	$2,098,895	5,247
Home Improvement & Gardening	$225	15%	$4,452,238	19,788
Books, Media & Computers	$200	10%	$844,882	4,224
Sporting Goods	$250	10%	$1,154,439	4,618
Toys & Hobbies	$250	15%	$1,555,515	6,222
Specialty Retail	$250	15%	$1,875,774	7,503
Quick Service F&B	$400	15%	$5,065,348	12,663
Restaurants & Pubs	$350	5%	$1,905,366	5,444
Arts & Entertainment	$175	5%	$182,229	1,041
Fitness & Leisure	$175	10%	$637,669	3,644
Auto Parts & Accessories	$350	5%	$495,200	1,415
Auto/RV/Motorsports Dealerships	$400	5%	$6,166,555	15,416
Auto Fuel				
TOTAL RETAIL CATEGORIES ONLY	**$342**	**9%**	**$56,030,175**	**163,808**

1.06 M SF

ESTIMATED RESIDUAL RETAIL DEMAND IN CITY

(as of September 2022 including vacant space)

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

Table 5.3 illustrates to combined demand resulting from the Total Primary Trade Area, including the City of Grande Prairie. The figures reveal demand for approximately 4.83 million sf of retail at a combined market share of approximately 59%. Interestingly, this total PTA figure almost mirrors the City's current inventory.

*Secondary Trade Area **West** Supply - Demand*

Each of the Secondary Trade Areas are 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 411,200 sf at a market share of 11%.

*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 163,808 sf at a market share of 9%.

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 North at approximately 221,799 sf at a market share of 23%.

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

Total Trade Area Supply - Demand

Table 5.7 aggregates the total demand for floorspace in the City of Grande Prairie attributable to residents of the Primary and Secondary Trade Areas at approximately 5.63 million sf.

When compared against the current city's **occupied retail inventory** or supply at 3.98 million sf, the difference between demand and supply equates to almost 1.06 million sf of residual retail demand that could be supported in the City of Grande Prairie (this value includes current vacant space in the City).

If one factors into the equation a forecasted PTA population growth of approximately +/- 13,265 people over the next decade, then the estimated future floorspace demand could grow by approximately 398,000 sf (13,265 x 30 sf per capita). However, much of this future growth is likely to be part of existing residual demand thereby creating a relatively balanced retail market, if targeted and positioned appropriately.

TABLE 5.6

STA NORTH RETAIL FLOORSPACE DEMAND

Retail Spending by Merchandise Category	2022			
	STA North Retail Sales Productivity ($psf)	Inflow Market Share	Inflow Sales $	Floorspace Demand (sf)
Grocery, Convenience & Specialty Foods	$550	15%	$10,500,259	19,091
Pharmacy	$400	15%	$899,081	2,248
Alcohol, Tobacco & Cannabis	$500	15%	$1,564,927	3,130
Personal Services	$250	15%	$1,407,922	5,632
Fashion & Accessories	$275	50%	$11,624,167	42,270
Jewelry	$400	50%	$885,165	2,213
Health & Beauty	$350	50%	$2,556,888	7,305
Furniture & Décor	$275	50%	$4,103,132	14,920
Electronics & Appliances	$400	40%	$4,232,881	10,582
Home Improvement & Gardening	$225	50%	$7,815,540	34,736
Books, Media & Computers	$200	40%	$1,658,186	8,291
Sporting Goods	$250	20%	$1,260,045	5,040
Toys & Hobbies	$250	50%	$2,782,418	11,130
Specialty Retail	$250	50%	$3,140,619	12,562
Quick Service F&B	$400	50%	$8,214,491	20,536
Restaurants & Pubs	$350	15%	$2,941,644	8,405
Arts & Entertainment	$175	20%	$356,607	2,038
Fitness & Leisure	$175	20%	$610,212	3,487
Auto Parts & Accessories	$350	5%	$257,396	735
Auto/RV/Motorsports Dealerships	$400	5%	$2,979,033	7,448
Auto Fuel				
TOTAL RETAIL CATEGORIES ONLY	**$315**	**23%**	**$69,790,613**	**221,799**

TABLE 5.7

TOTAL TRADE AREA RETAIL FLOORSPACE DEMAND

Retail Spending by Merchandise Category	2022		
	Total Floorspace Demand (sf)	Current City Retail Inventory (sf)	Total Residual Demand (sf)
Grocery, Convenience & Specialty Foods	886,455	633,507	-252,948
Pharmacy	117,603	87,363	-30,241
Alcohol, Tobacco & Cannabis	135,806	129,190	-6,616
Personal Services	263,322	121,028	-142,294
Fashion & Accessories	629,607	360,910	-268,697
Jewelry	34,516	43,421	8,905
Health & Beauty	96,234	41,688	-54,546
Furniture & Décor	244,475	135,666	-108,809
Electronics & Appliances	170,271	288,439	118,168
Home Improvement & Gardening	400,133	267,445	-132,688
Books, Media & Computers	164,932	15,094	-149,837
Sporting Goods	140,487	122,015	-18,472
Toys & Hobbies	149,790	48,948	-100,842
Specialty Retail	202,174	273,164	70,990
Quick Service F&B	272,517	215,767	-56,750
Restaurants & Pubs	357,950	200,640	-157,310
Arts & Entertainment	68,600	144,000	75,400
Fitness & Leisure	156,140	61,850	-94,290
Auto Parts & Accessories	116,072	173,918	57,846
Auto/RV/Motorsports Dealerships	1,024,027	458,050	-565,977
Auto Fuel			
TOTAL RETAIL CATEGORIES ONLY	**5,631,109**	**3,822,101**	**-1,809,008**
	Including Vacant space	745,595	-1,063,413

It is not realistic to plan for 1 million sf of new retail space. 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

FBM 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.

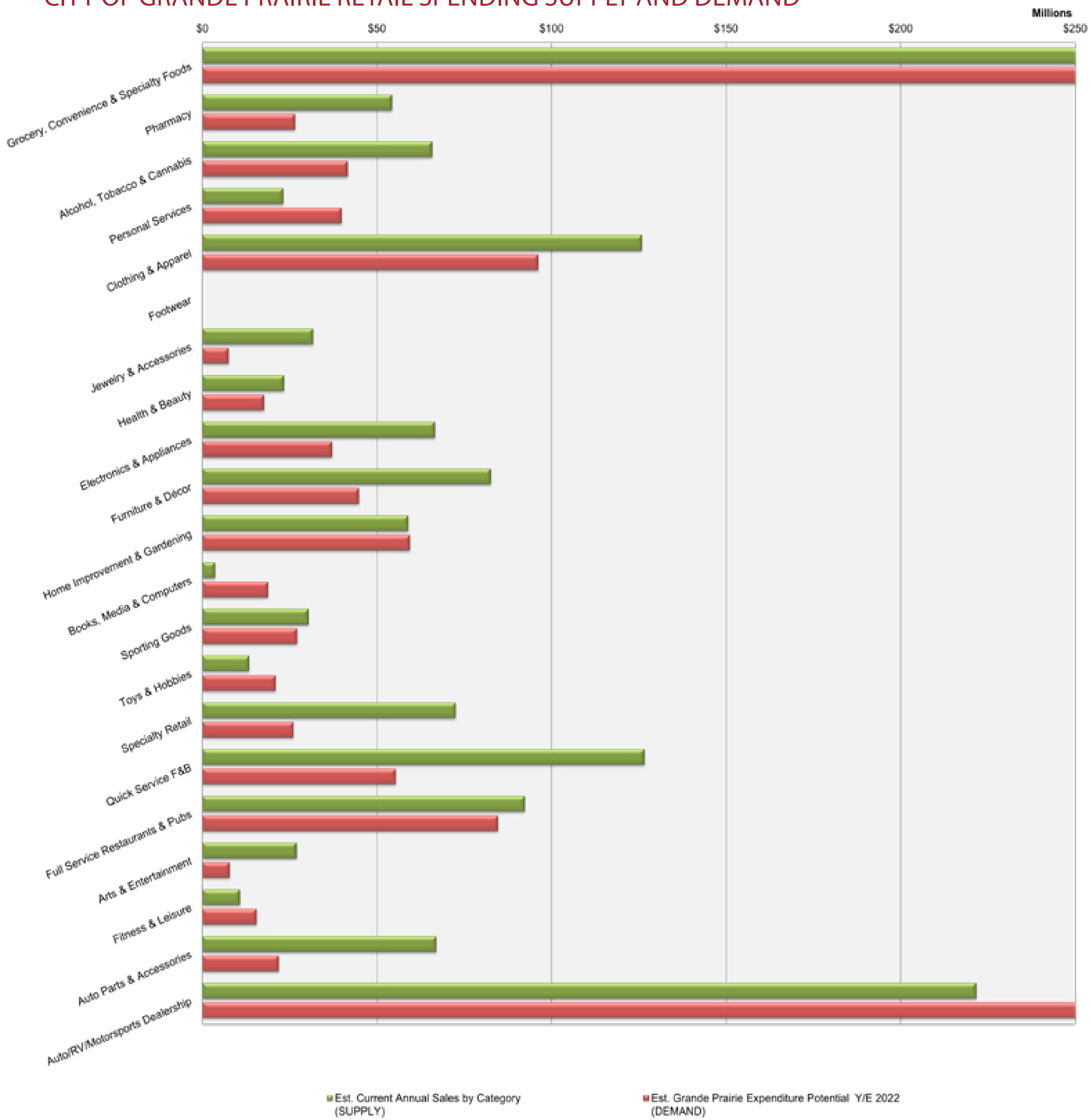
Outflow (sometimes referred to as Leakage) in an area represents a condition whereby a market's supply is less than the demand. In other words, retailers outside the market area are fulfilling the demand for retail products and thus demand is outflowing or leaking out of the normal or Primary Trade Area. In fact, it is common for many markets, particularly those closer to major metropolitan areas, to have many areas where sales outflow occurs.

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.

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).

FIGURE 5.1

CITY OF GRANDE PRAIRIE RETAIL SPENDING SUPPLY AND DEMAND



$374 million

ESTIMATED NET INFLOW OF RETAIL SALES (2022 Y/E EST)

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, **Table 5.8** reveals a pattern in which the following categories exhibit noticeable sales outflow, having the greatest outflow factors:

Books, Media, & Computers:	-69.2
Personal Services:	-26.5
Toys & Hobbies:	-22.2
Fitness & Leisure:	-18.3

All other categories indicate only marginal outflow or positive surplus (inflow) factors, in several 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. The City has an estimated net inflow of retail sales of over $374 million.

TABLE 5.8

RETAIL INFLOW / OUTFLOW ESTIMATES

Merchandise Category	Est. Current Annual Sales by Category (SUPPLY)	Est. Grande Prairie Expenditure Potential Y/E 2022 (DEMAND)	Grande Prairie Outflow / Inflow Estimates	Grande Prairie Outflow / Inflow Factor
Grocery, Convenience & Specialty Food	$396,361,763	$303,253,164	$93,108,599	13.3
Pharmacy	$54,279,000	$26,583,208	$27,695,792	34.3
Alcohol, Tobacco & Cannabis	$65,845,125	$41,636,484	$24,208,641	22.5
Personal Services	$23,126,200	$39,821,036	-$16,694,836	-26.5
Clothing & Apparel	$125,891,774	$96,220,479	$29,671,295	13.4
Footwear				
Jewelry & Accessories	$31,700,750	$7,523,409	$24,177,341	61.6
Health & Beauty	$23,362,313	$17,672,997	$5,689,316	13.9
Electronics & Appliances	$66,594,600	$37,157,418	$29,437,182	28.4
Furniture & Decor	$82,641,556	$44,826,152	$37,815,404	29.7
Home Improvement & Gardening	$58,965,750	$59,361,501	-$395,751	-0.3
Books, Media & Computers	$3,559,210	$18,817,736	-$15,258,526	-68.2
Sporting Goods	$30,348,815	$27,085,349	$3,263,466	5.7
Toys & Hobbies	$13,323,219	$20,935,238	-$7,612,019	-22.2
Specialty Retail	$72,523,250	$26,042,499	$46,480,751	47.2
Quick Service F&B	$126,597,763	$55,374,096	$71,223,667	39.1
Full Service Restaurants & Pubs	$92,303,795	$84,726,424	$7,577,371	4.3
Arts & Entertainment	$26,993,750	$7,803,732	$19,190,018	55.1
Fitness & Leisure	$10,694,688	$15,477,002	-$4,782,315	-18.3
Auto Parts & Accessories	$67,000,504	$21,868,485	$45,132,019	50.8
Auto/RV/Motorsports Dealership	$221,653,125	$267,532,109	-$45,878,984	-9.4
Professional/Medical/Financial Service				
VACANT				
TOTAL	**$1,593,766,948**	**$1,219,718,518**	**$374,048,430**	**13.3**

6 CONSUMER INTERCEPT SURVEY

6.1 INTRODUCTION

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

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

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

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

6.2 RESPONDENT RESIDENCE

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

An important component to determining and validating the Retail Market & Gap Analysis quantification is ensuring that a representative sample of the trade area is interviewed. **Figure 6.1** illustrates the breakdown of Respondent residences for the Consumer Intercept Survey, revealing 72% of respondents currently live in the City of Grande Prairie, with a further 6% living in the County of Grande Prairie, and the remaining from communities outside of the County, including British Columbia. Since 2016, there has been a shift to a more concentrated retention of patronage from within the City (65% of respondents in 2016).

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

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

6.3 PREFERRED SHOPPING LOCATIONS

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

FIGURE 6.1

CONSUMER SURVEY RESPONDENTS RESIDENCE OF ORIGIN

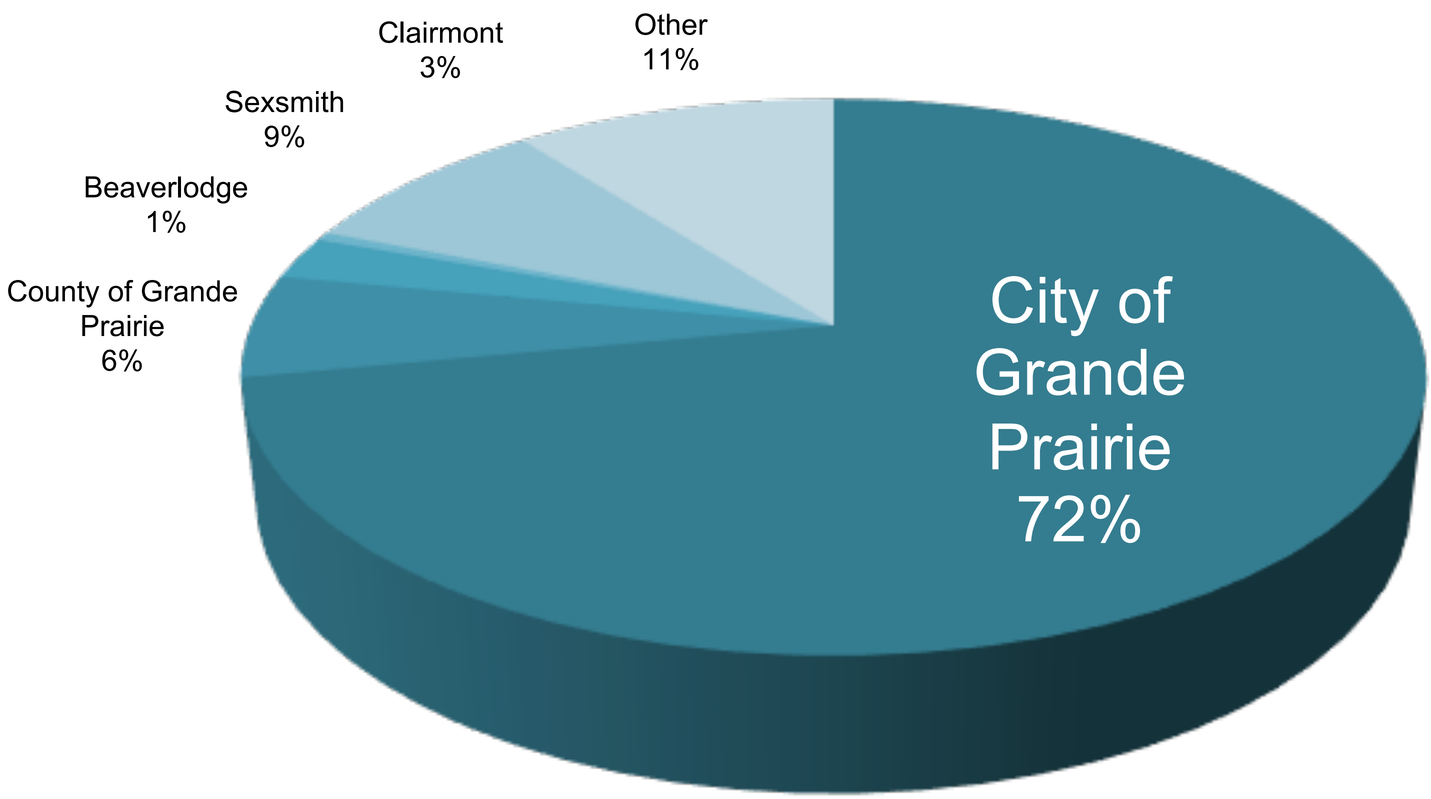
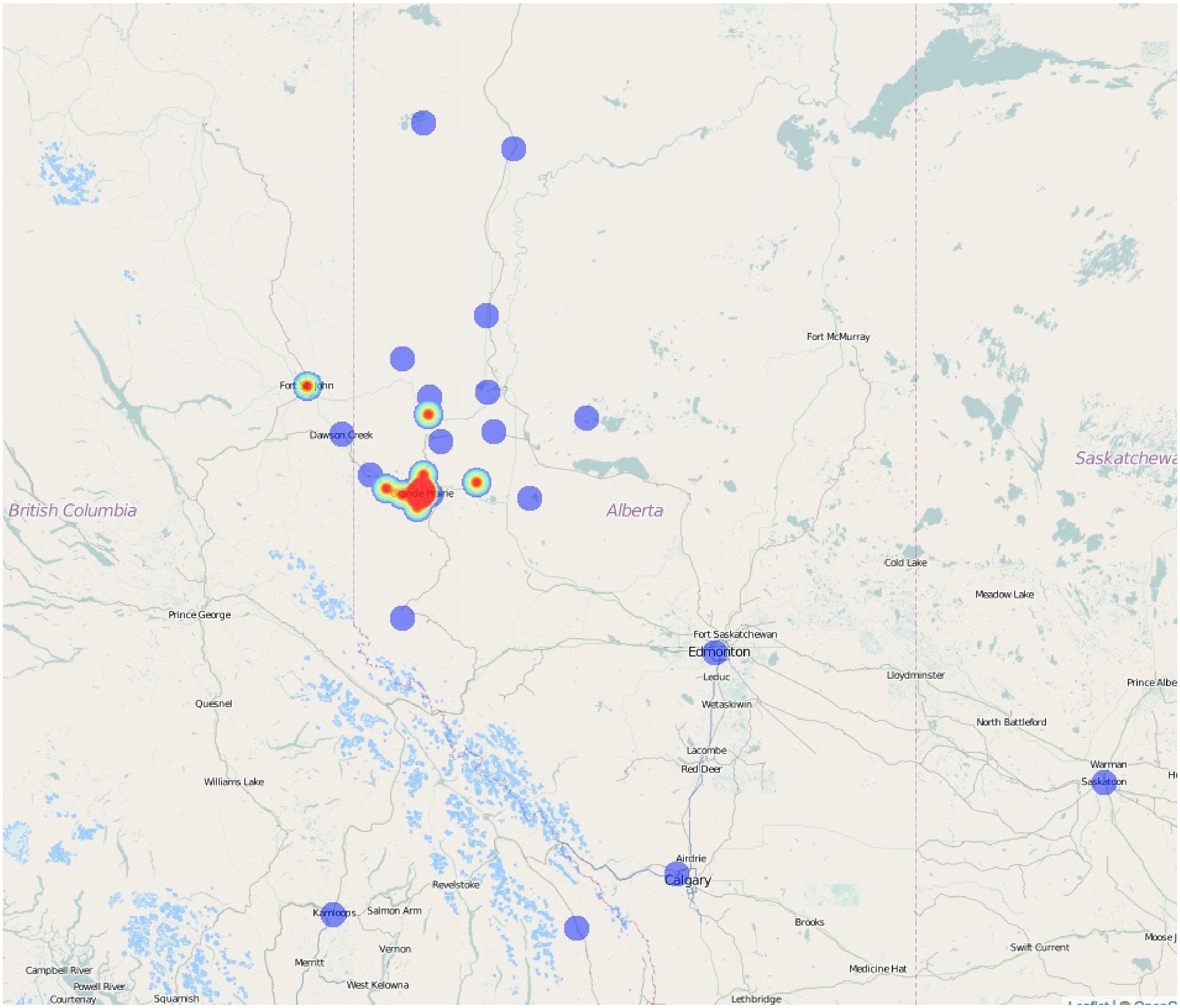


FIGURE 6.2

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



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

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

Primary Convenience Shopping Centre

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

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

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

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

Primary Comparison Shopping Centre

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

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

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

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

FIGURE 6.3
CONSUMER SURVEY RESPONDENT TRADE AREA "HEAT MAP" BY POSTAL CODE

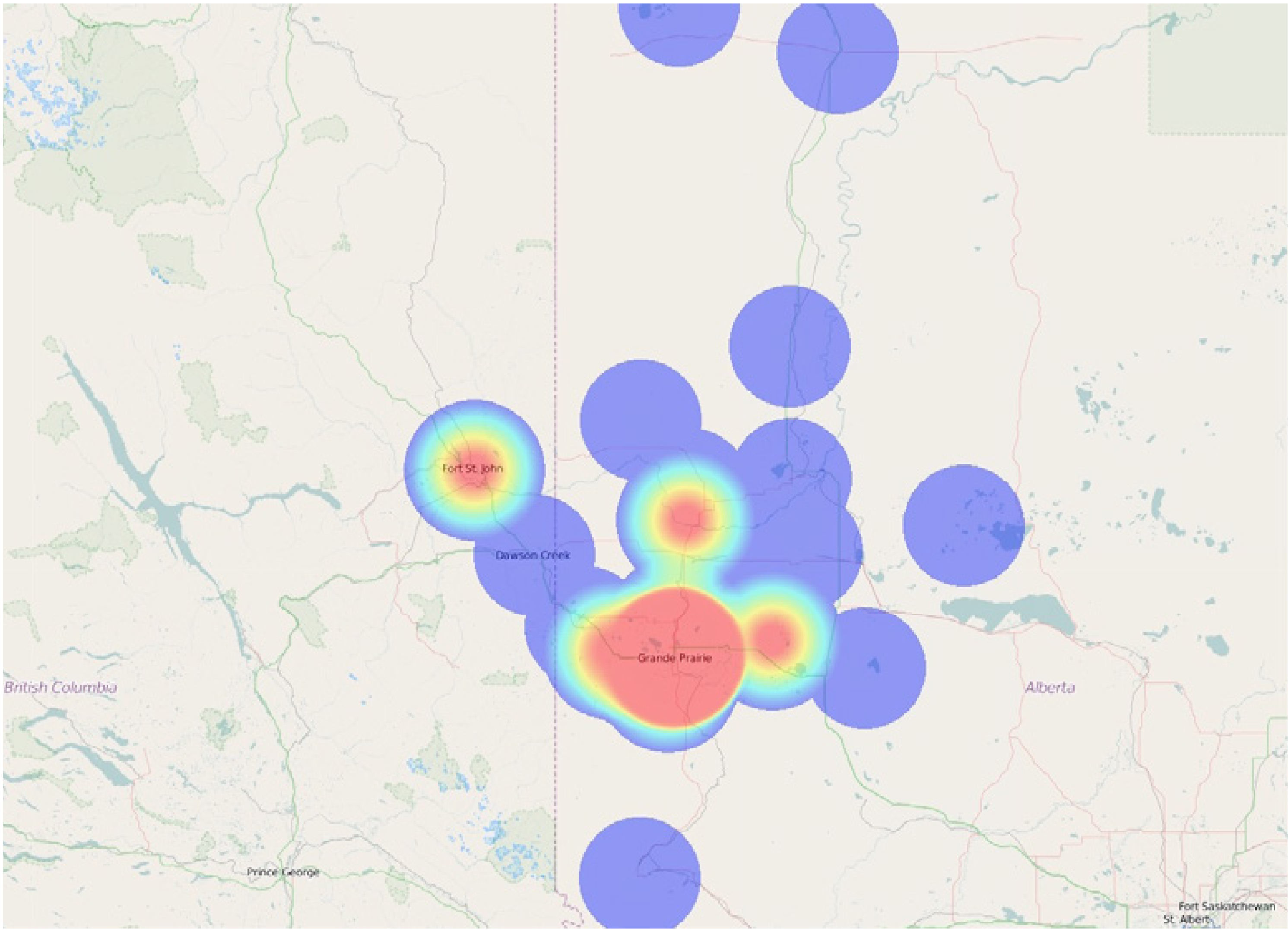


FIGURE 6.4

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

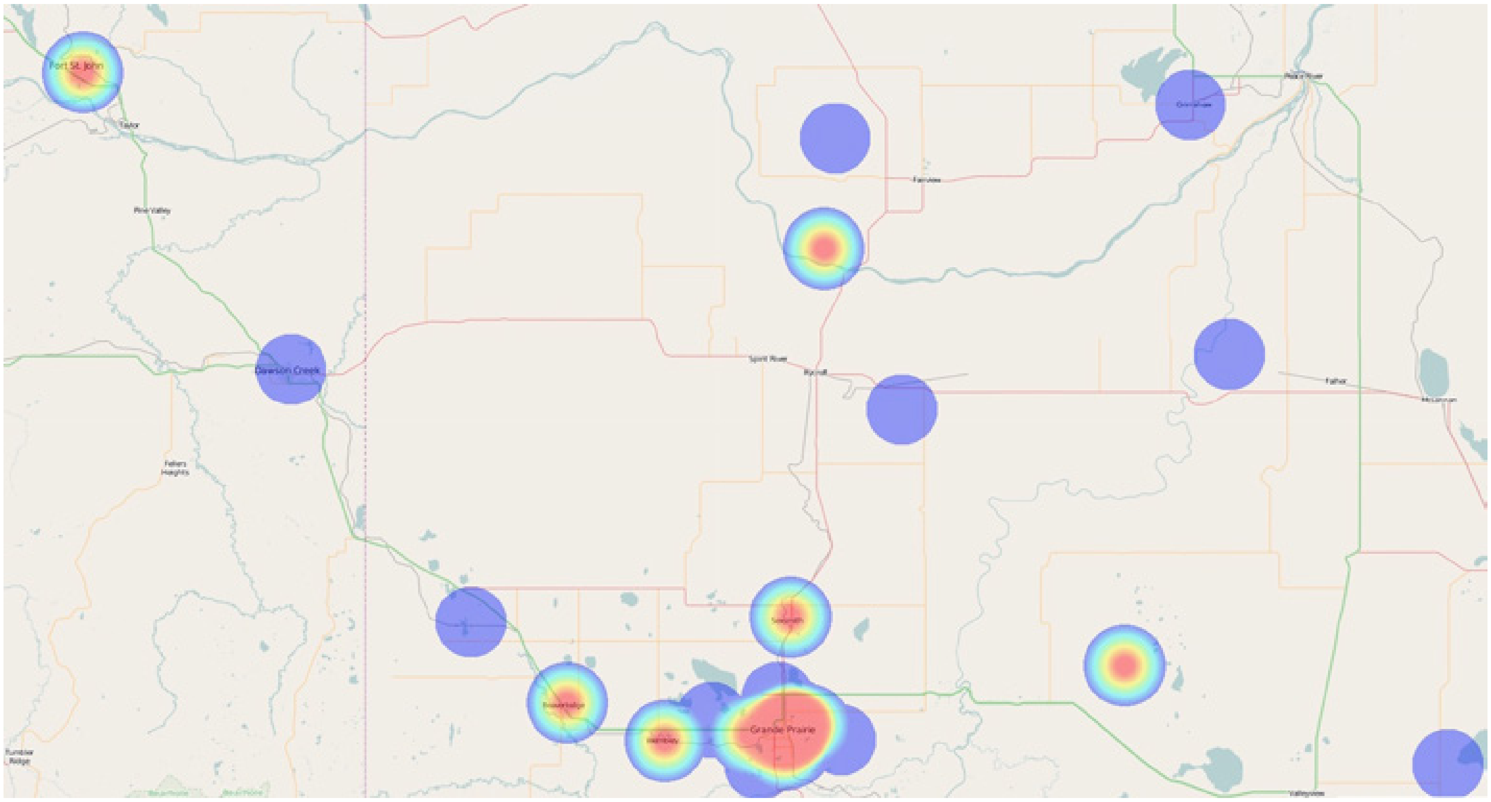
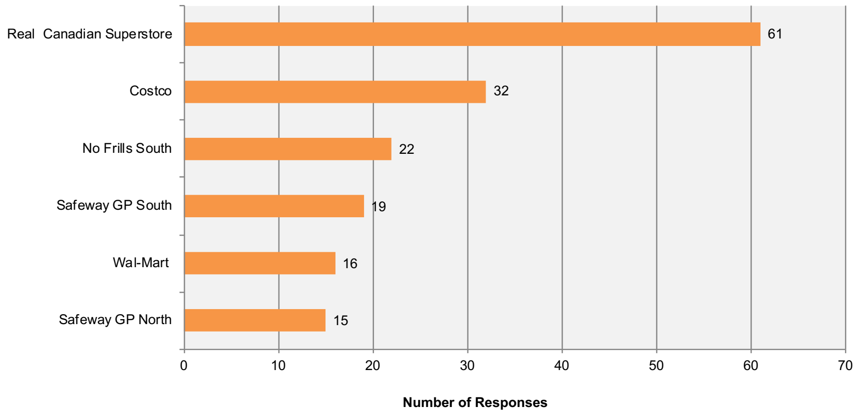


FIGURE 6.5

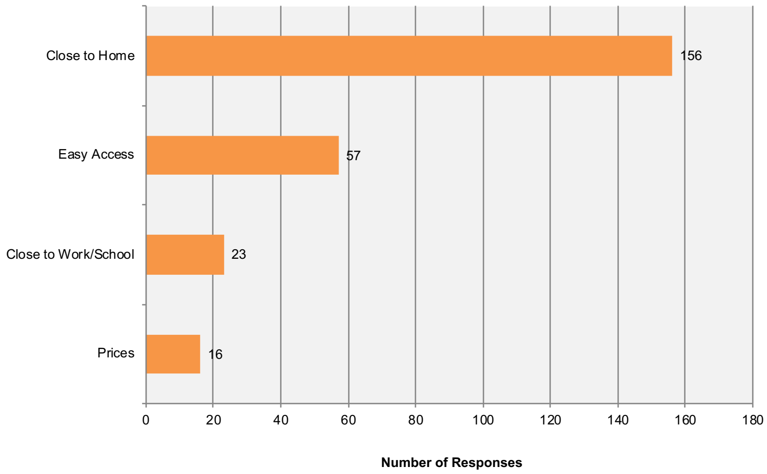
WHAT IS YOUR PRIMARY CONVENIENCE SHOPPING CENTRE?



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

FIGURE 6.6

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



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

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

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

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

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

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

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

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

6.4 LIKES & DISLIKES OF RETAIL IN GRANDE PRAIRIE

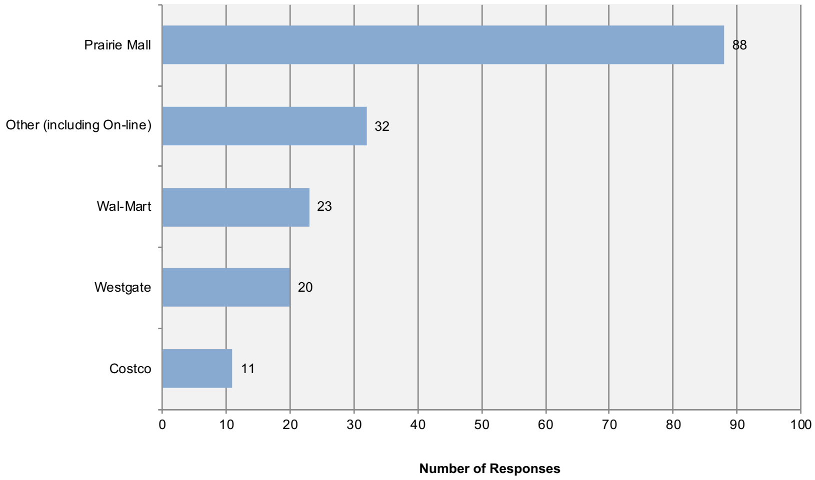
Figures 6.9 and 6.10 highlight the "likes" and "dislikes" of the respondents as it relates to the current shopping opportunities in Grande Prairie.

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

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

FIGURE 6.7

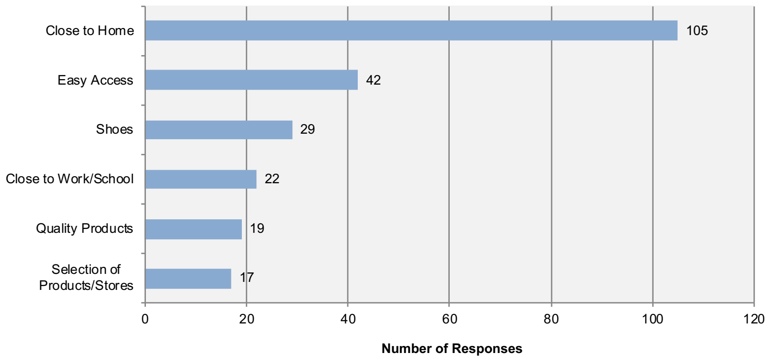
WHAT IS YOUR PRIMARY COMPARISON SHOPPING CENTRE?



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

FIGURE 6.8

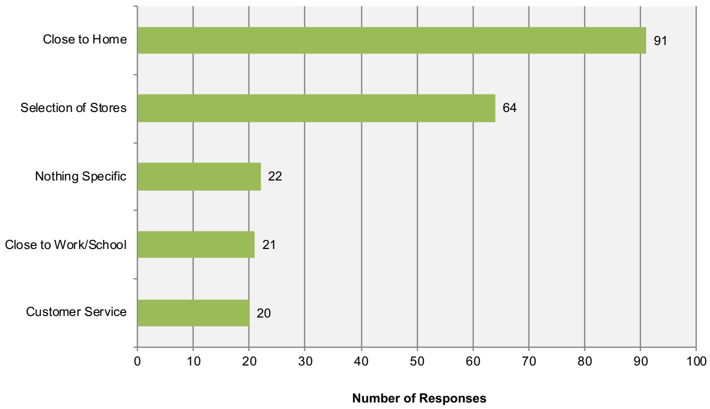
WHAT IS YOUR PRIMARY REASON FOR CHOOSING A COMPARISON SHOPPING CENTRE?



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

FIGURE 6.9

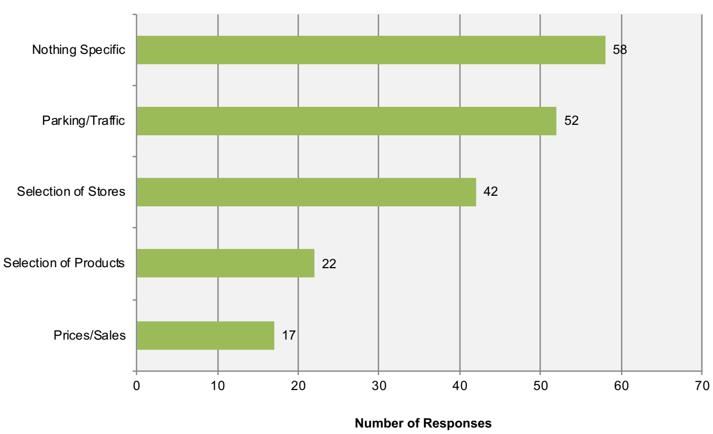
WHAT DO YOU LIKE MOST ABOUT SHOPPING IN GRANDE PRAIRIE?



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

FIGURE 6.10

WHAT DO YOU DISLIKE MOST ABOUT SHOPPING IN GRANDE PRAIRIE?



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

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

6.5
DESIRED SHOPS & SERVICES

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

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

Referring to **Figure 6.11,** which allows for multiple responses (to a maximum of 5 each), respondents overwhelmingly want to see more Full-Service Restaurants (153 responses) comprising responses such as Family Restaurants, Locally Owned Restaurants, Ethnic Restaurants and Upscale Dining, and Clothing & Footwear stores (67 responses). An increase in the quality and quantity of the above two categories would be well-received by the respondents and overall trade area residents as would a continued expansion of the variety of stores (124 responses).

Entertainment comprising many forms is also desired by many residents, while lastly there is now emerging a much stronger desire to support and want Local Stores. This latter represents a significant increase from past surveys and is a natural reflection of Grande Prairie's growth whereby consumers can get overwhelmed by brands and feel a desire to support local, unique shops and services again.

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

Top 3:

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

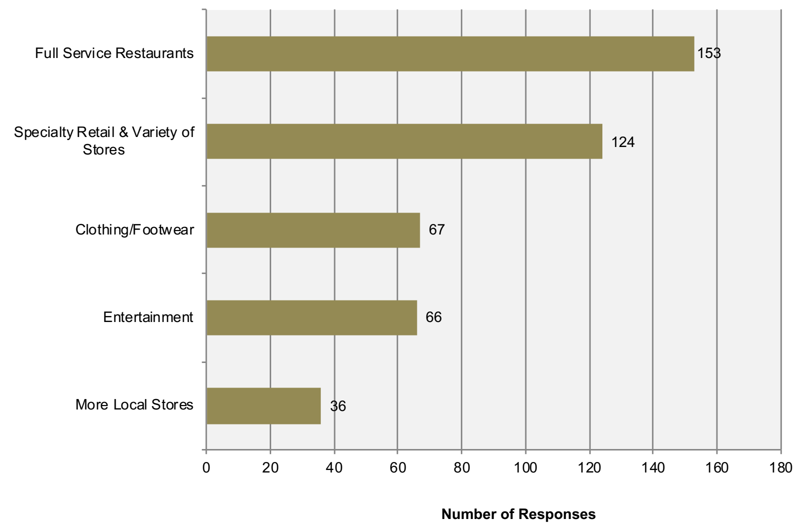
It is understood that Montana's has been actively examining the market over the past couple years and is currently seeking a Franchisee. Based on this reality, the next most cited responses were for Chili's, Old Spaghetti Factory and Cactus Club Cafe.

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

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

FIGURE 6.11

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



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

Photo: Kieron Hunt

Red Lobster Olive Garden & Montana's

CONTINUE TO BE MOST CITED RESTAURANTS DESIRED BY RESPONDENTS

FIGURE 6.12

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

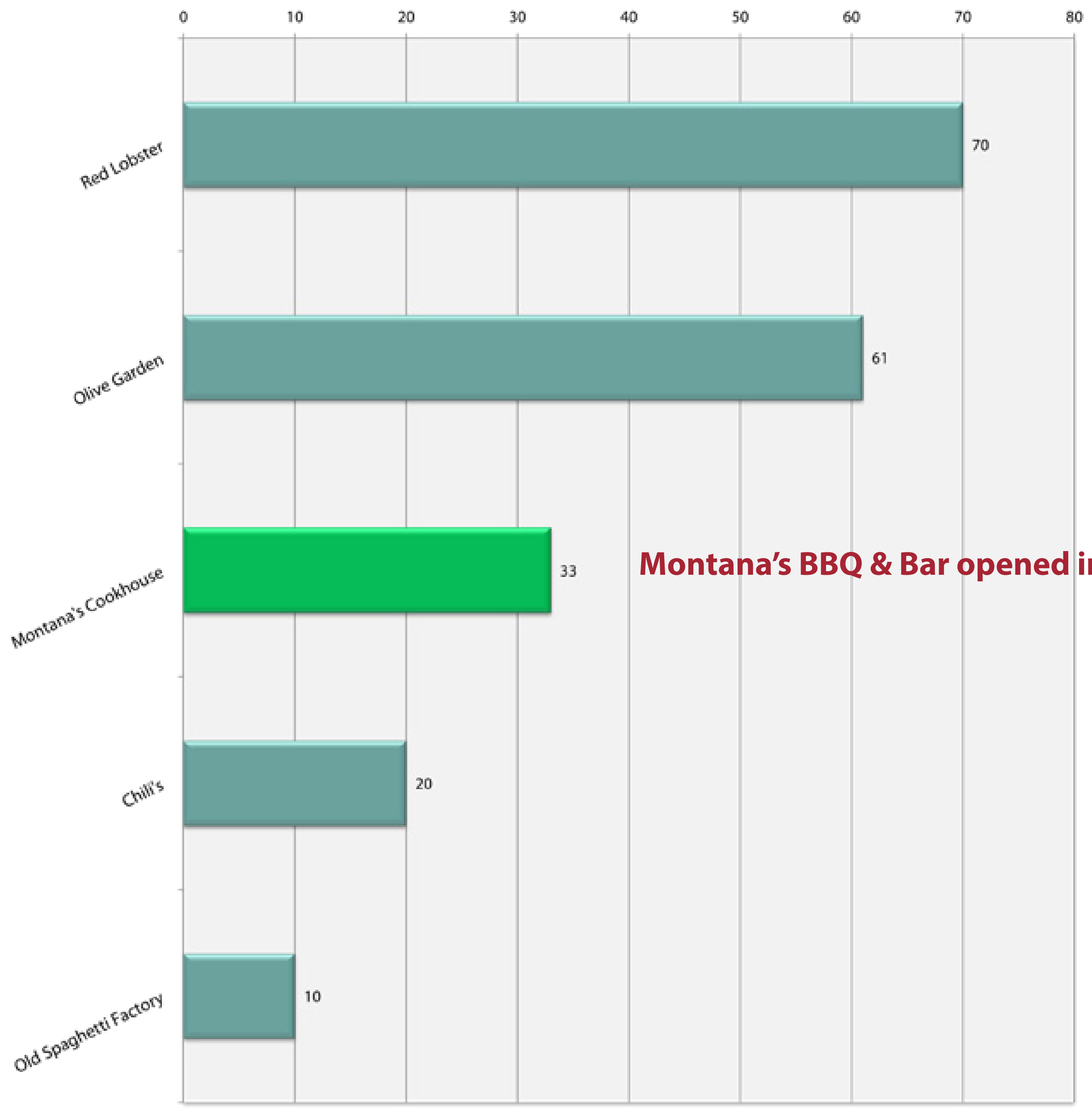
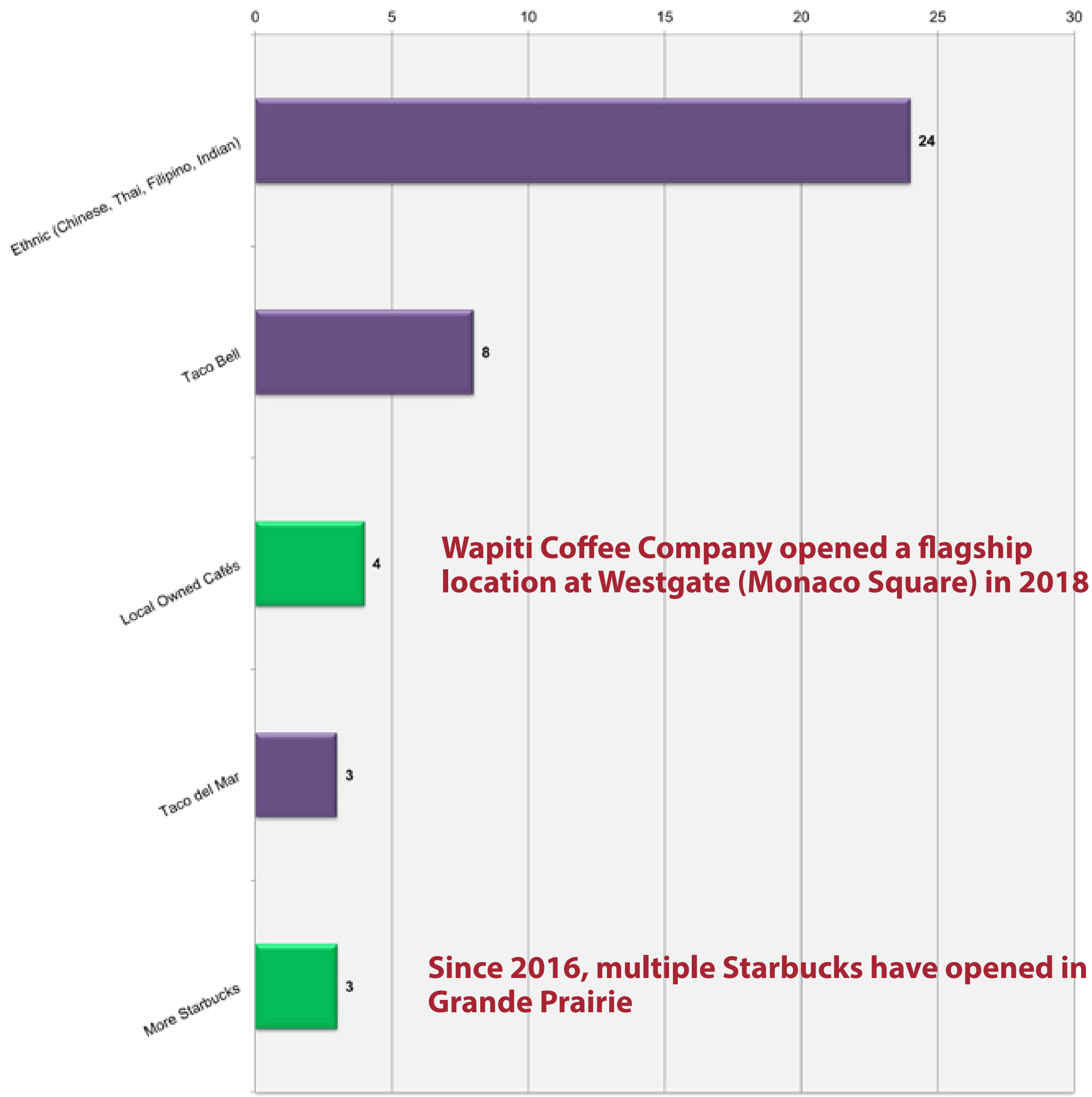


FIGURE 6.13

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



IKEA, INDIGO BOOKS & SPORT CHEK

CONTINUE TO BE MOST CITED RETAILER DESIRED BY SURVEY RESPONDENTS

FIGURE 6.14

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

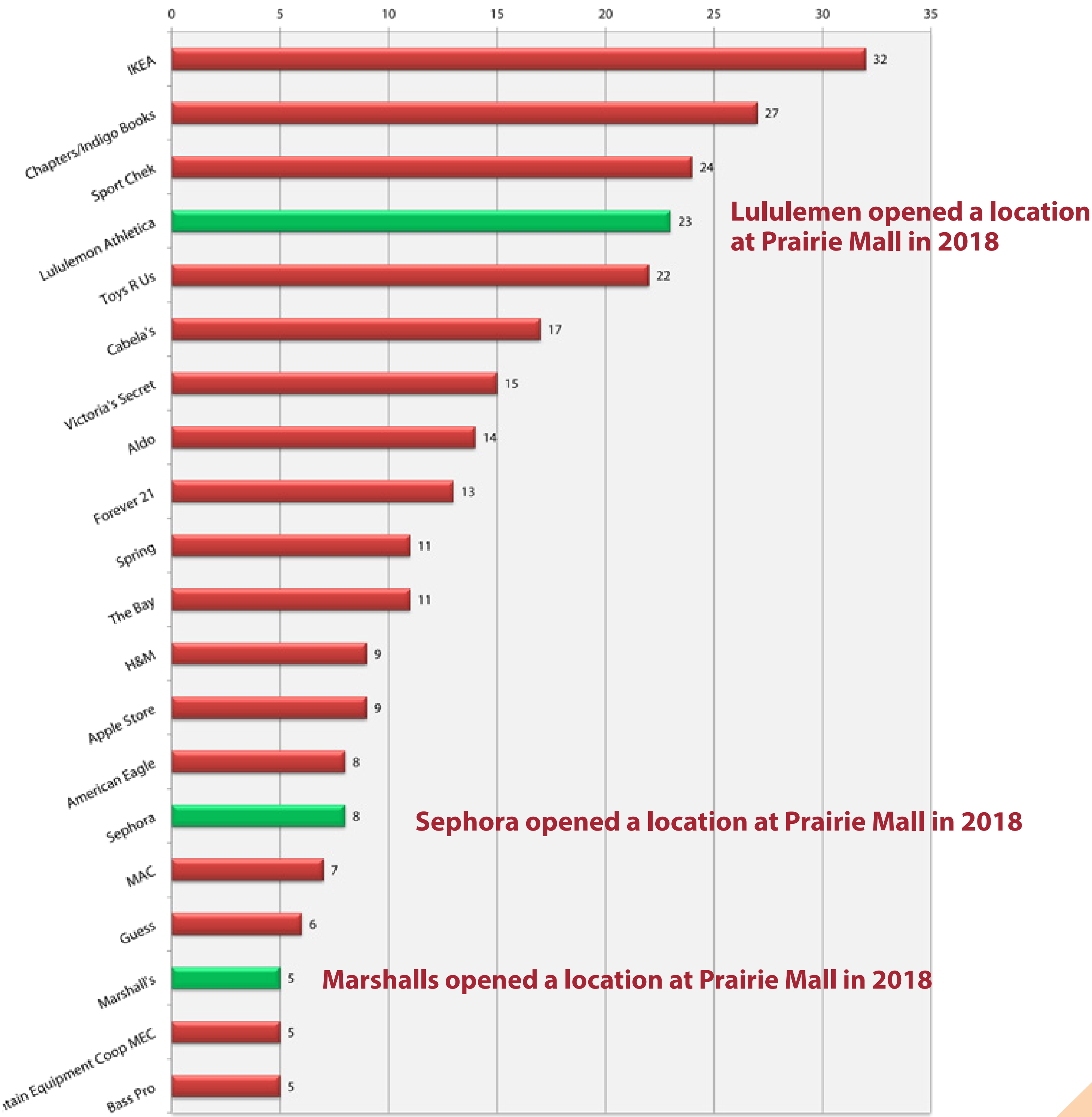
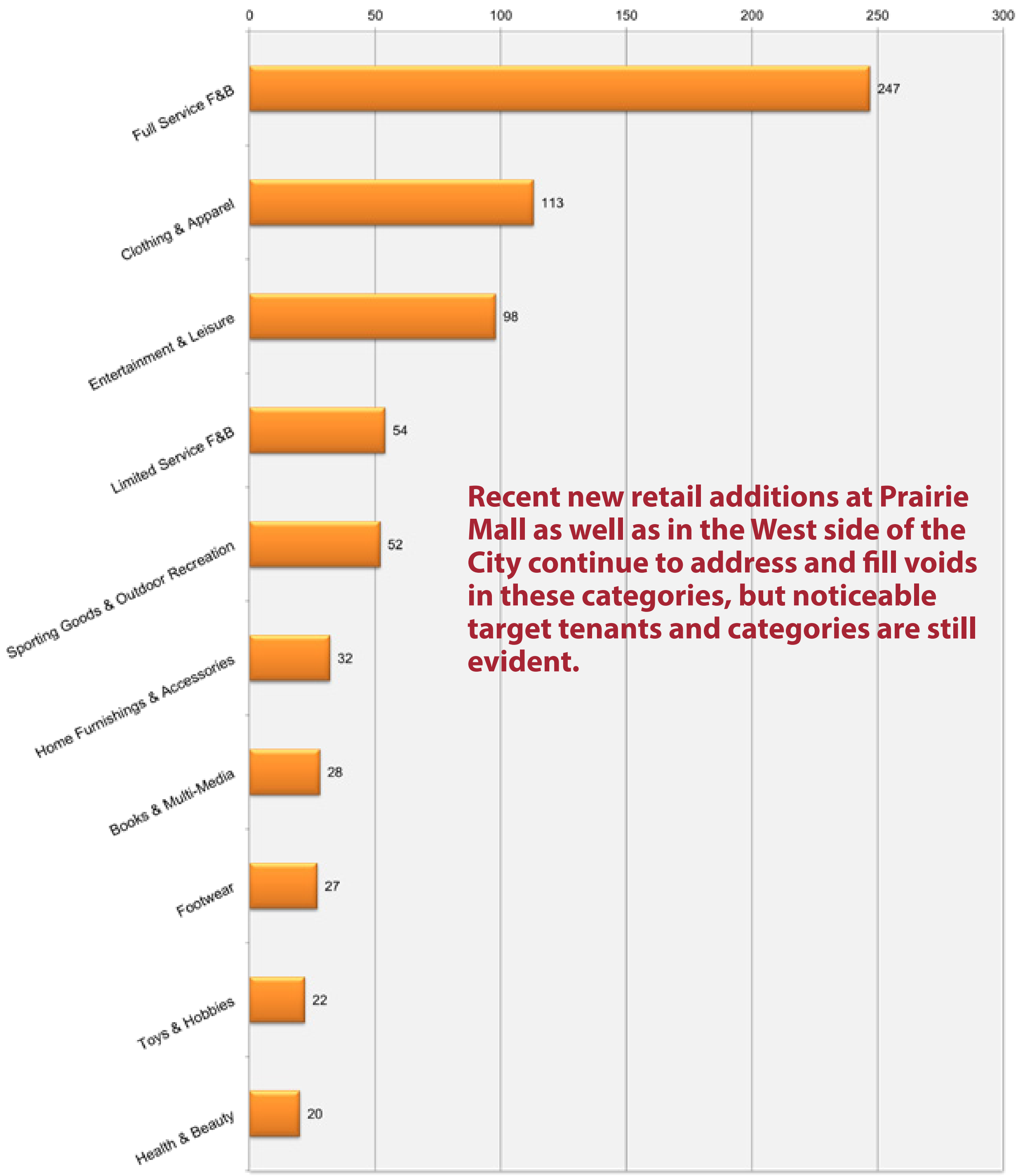


FIGURE 6.15

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



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

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

Similarly, the Grande Prairie Coffee Co. located in the downtown has established itself as a strong draw with a loyal customer base. In downtowns such as Grande Prairie where external development pressures have created challenges, it is often the local merchants and businesses that have the ability to create a "shop local" culture in redefining downtown spaces; Grande Prairie Coffee Company is but one example.

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

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

6.6 ALL RESPONDENTS SPENDING VERSUS IMPORTANCE

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

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

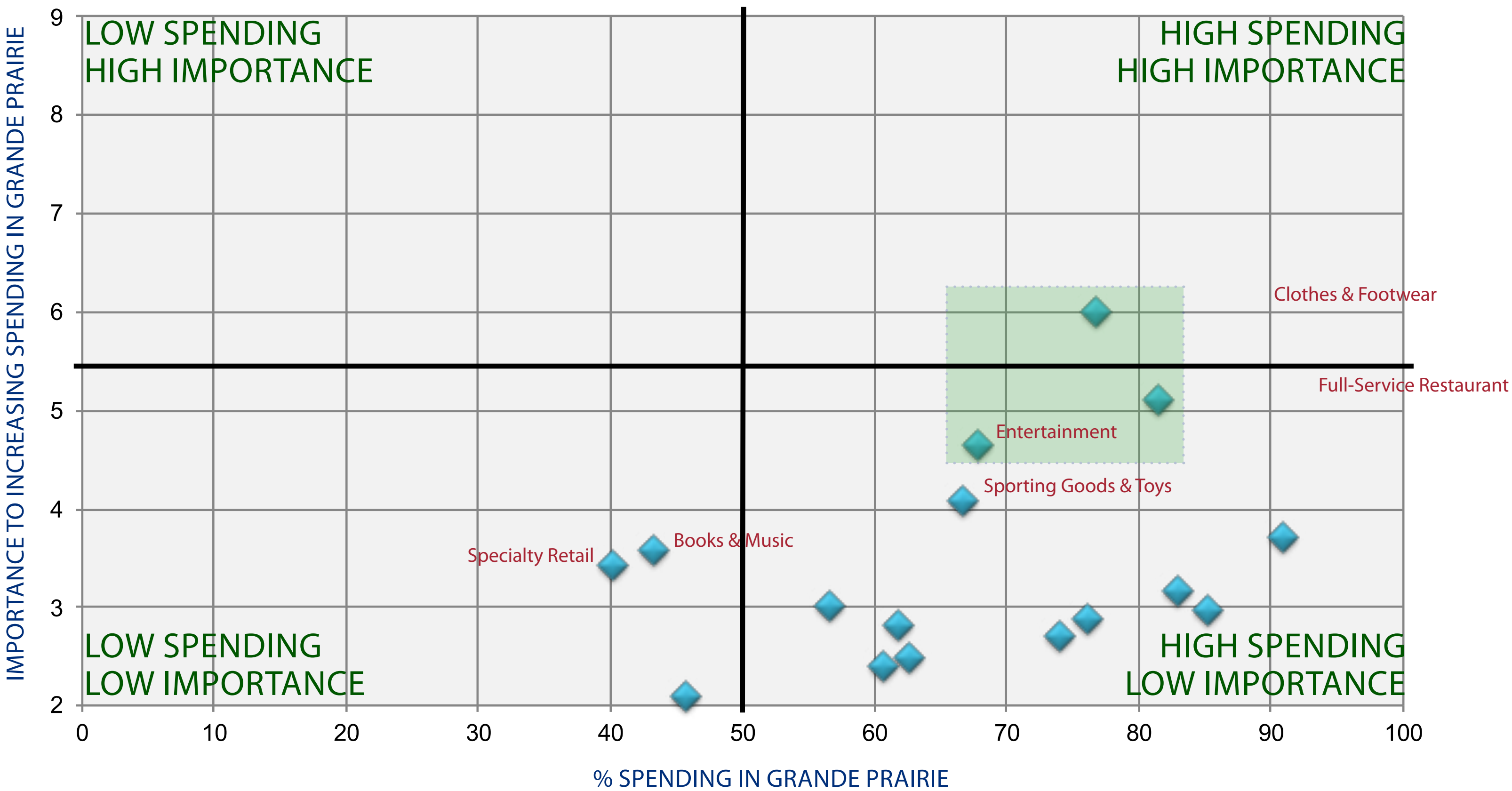
The results shown diagrammatically in **Figure 6.16** illustrates that categories comprising Full-Service Restaurants, Clothing & Footwear and Entertainment continue to have the highest spending by respondents, but also have the highest importance rating to increasing spending in the city.

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

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

FIGURE 6.16

SPENDING VERSUS IMPORTANCE RATINGS FOR ALL RESPONDENTS



RESTAURANTS CLOTHING & FOOTWEAR ENTERTAINMENT

MOST DESIRED RETAIL CATEGORIES BY CONSUMER RESPONDENTS

FIGURE 6.17

PERCENTAGE SPENDING IN GRANDE PRAIRIE BY RESPONDENT ORIGIN

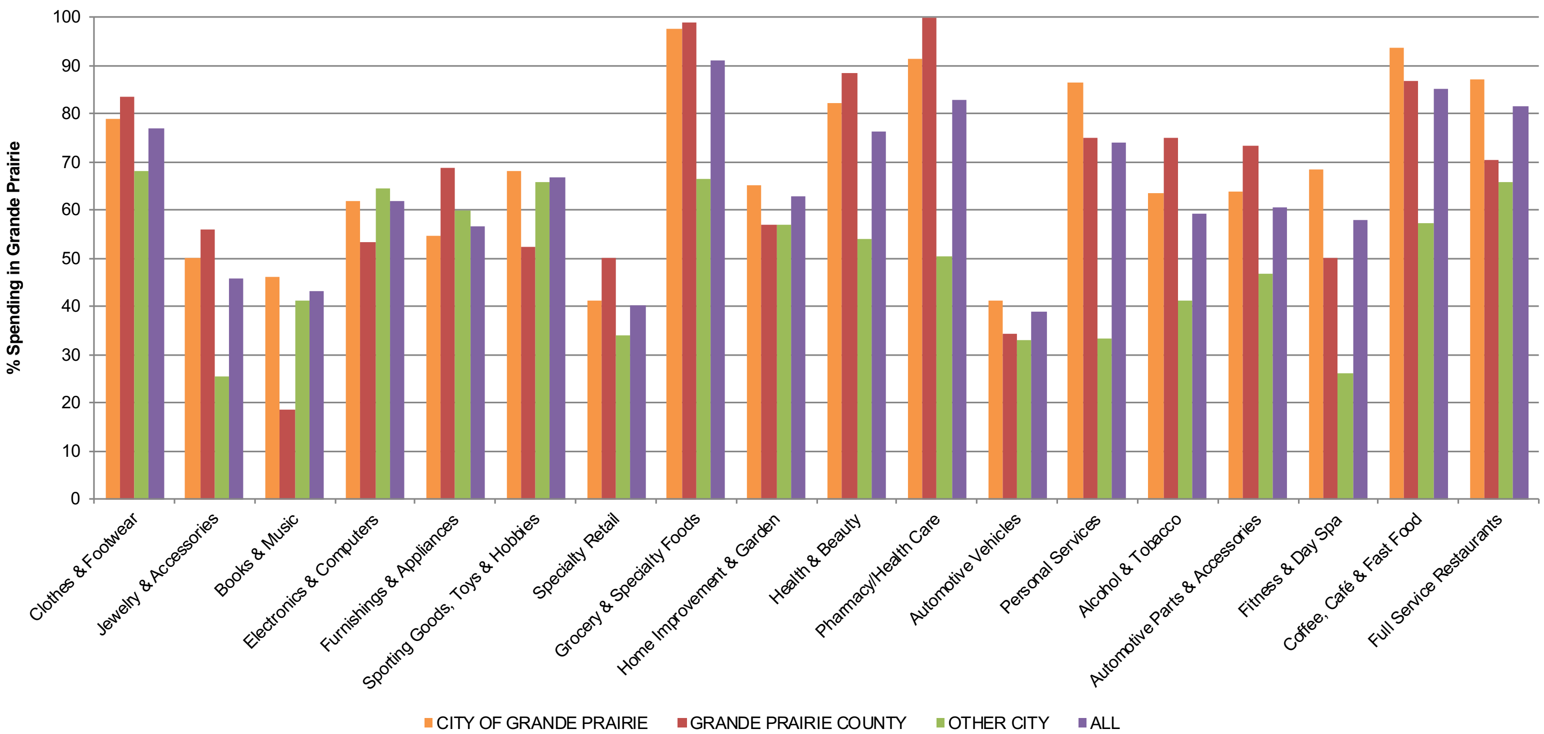
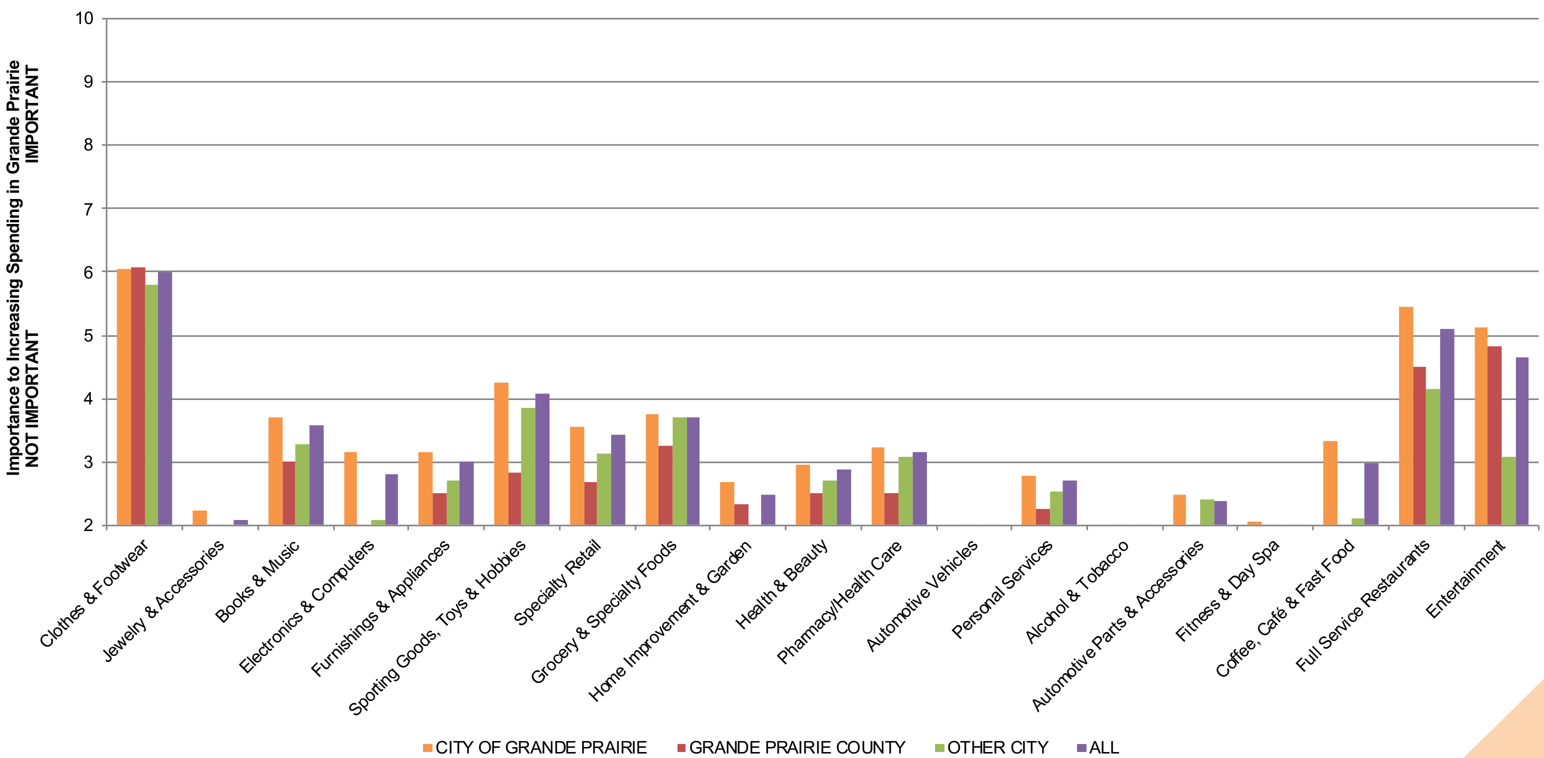


FIGURE 6.18

IMPORTANCE RATING TO INCREASE SPENDING BY RESPONDENT ORIGIN



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

6.7 RESPONDENT CROSS-TABULATIONS OF SPENDING VERSUS IMPORTANCE

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

Spending & Importance By Respondent Origin

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

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

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

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

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

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

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

Spending & Importance By Respondent Age

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

FIGURE 6.19
PERCENTAGE SPENDING IN GRANDE PRAIRIE BY RESPONDENT AGE COHORT

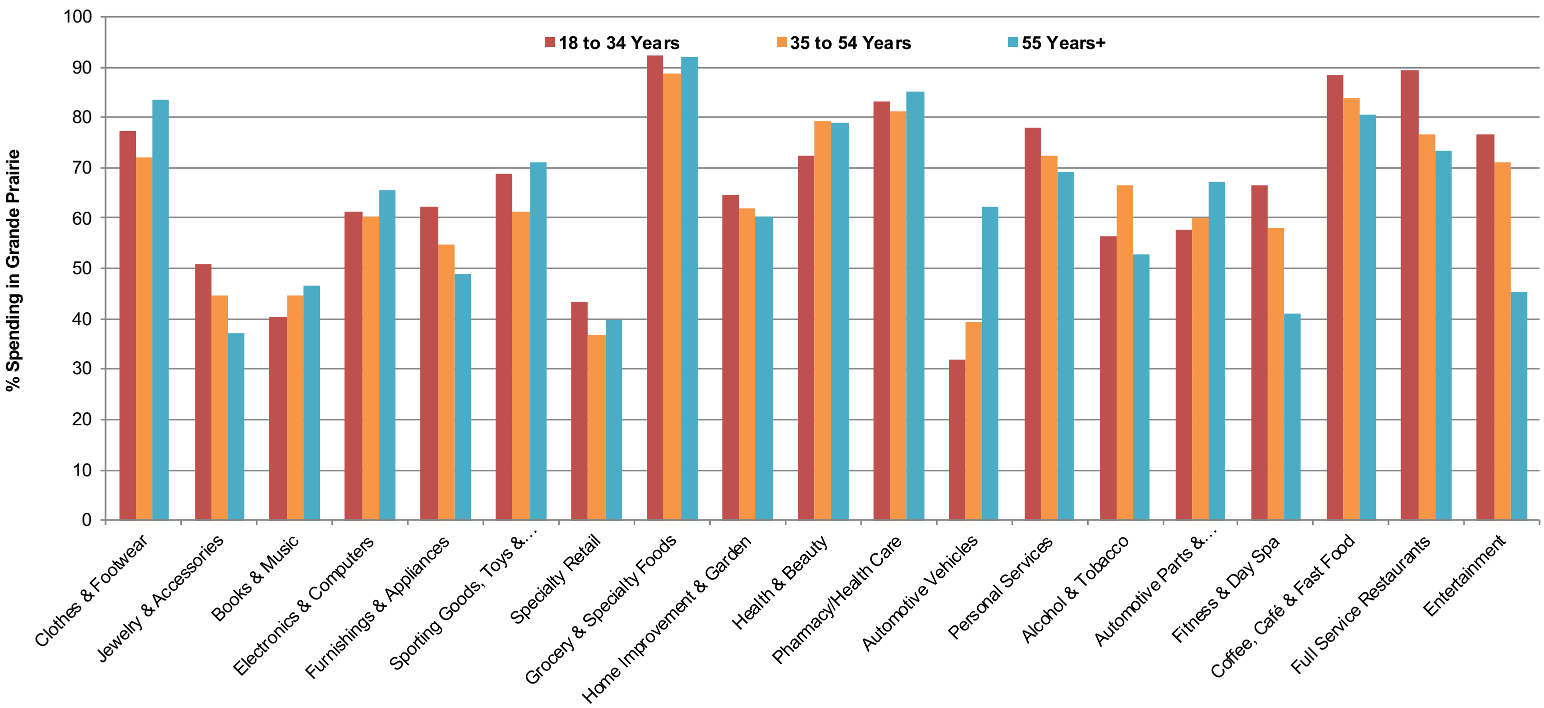
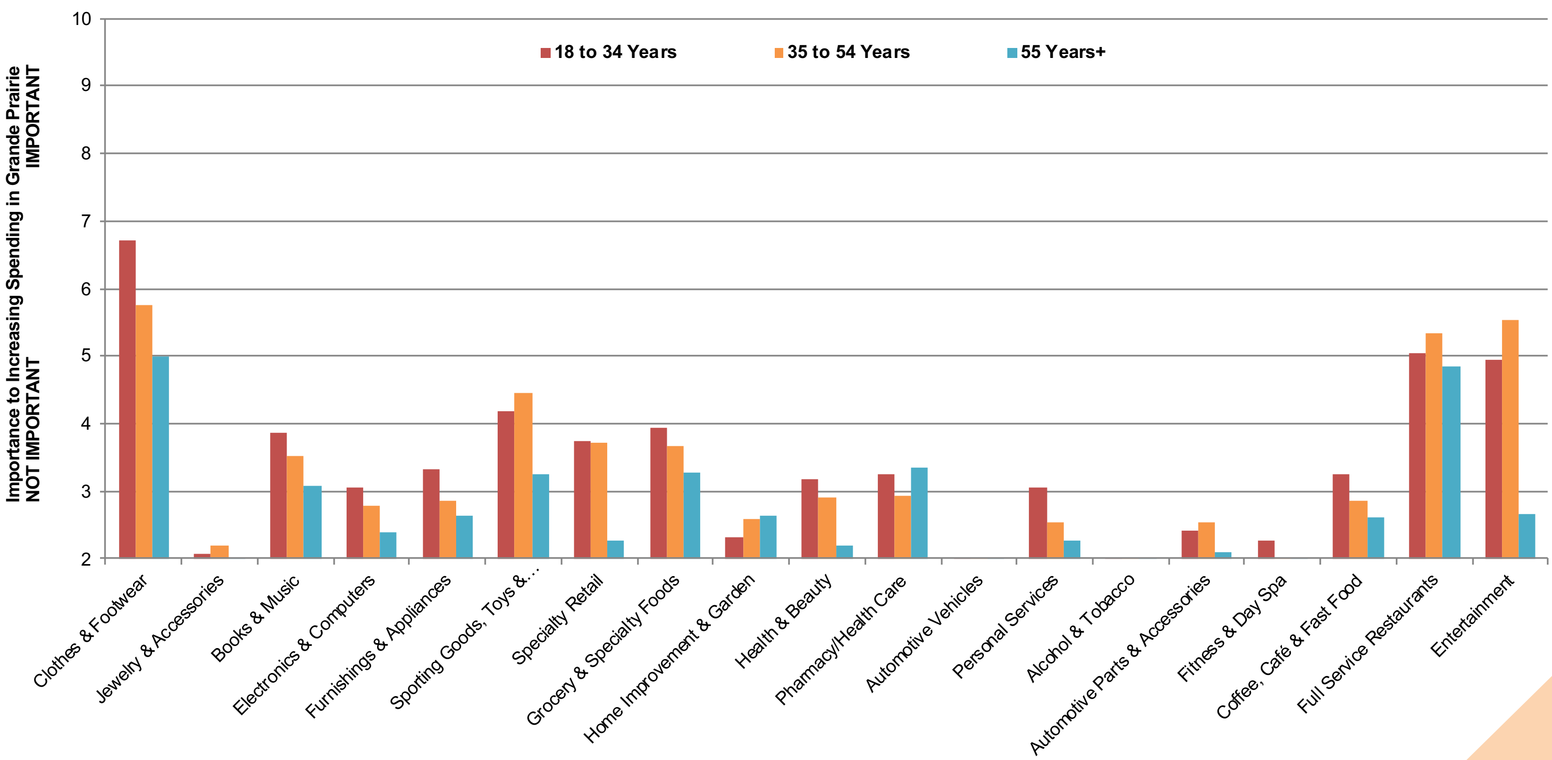


FIGURE 6.20
IMPORTANCE RATING TO INCREASE SPENDING BY RESPONDENT AGE COHORT



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

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

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

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

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

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

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

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

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

Retail spending has thus far catered more to the older demographic, but as the age profile illustrates, future emphasis should be geared toward the next generation of consumers who want to support Grande Prairie businesses, but equally are prepared to leave Grande Prairie or shop online, which continues to increase in popularity and convenience.

Spending & Importance By Respondent Household Income

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

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

FIGURE 6.21

PERCENTAGE SPENDING IN GRANDE PRAIRIE BY RESPONDENT HOUSEHOLD INCOME

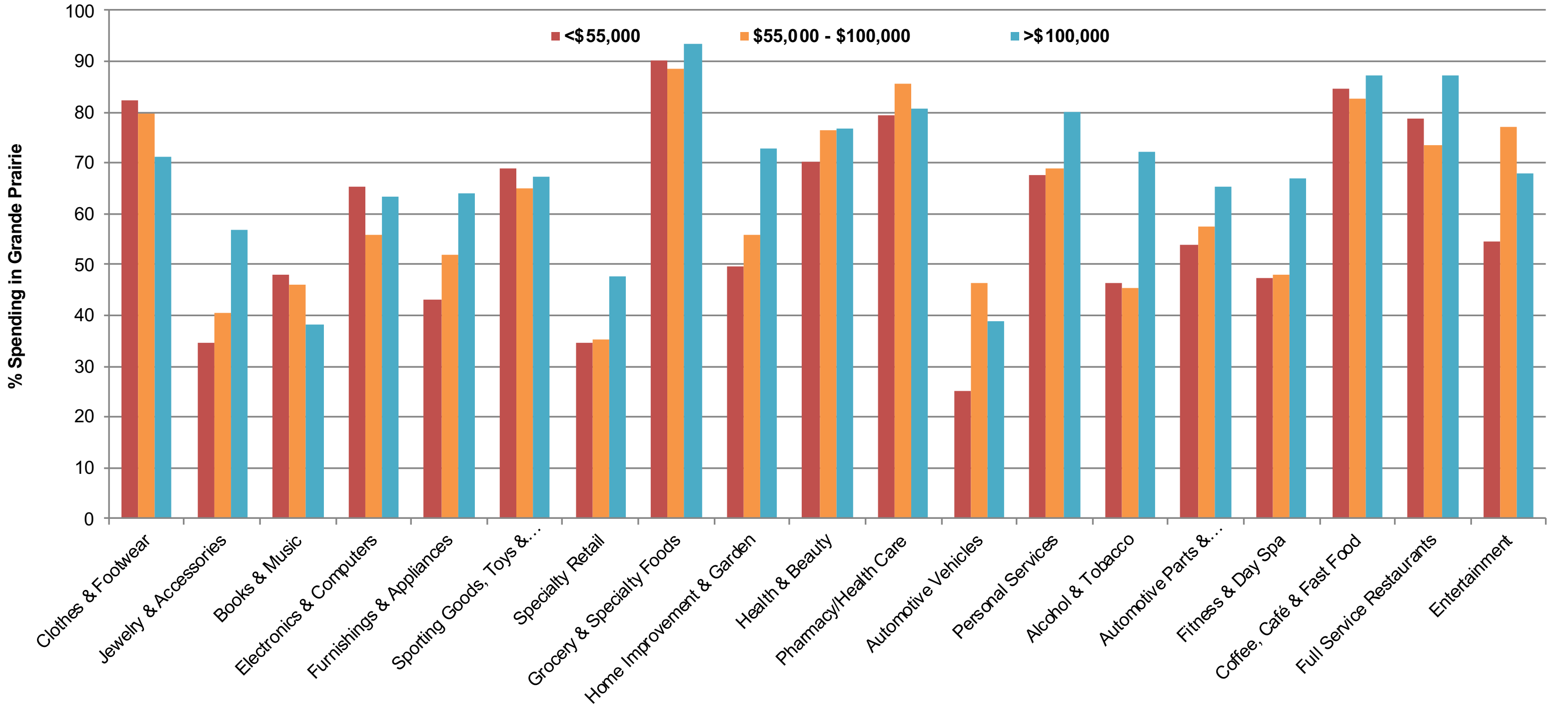
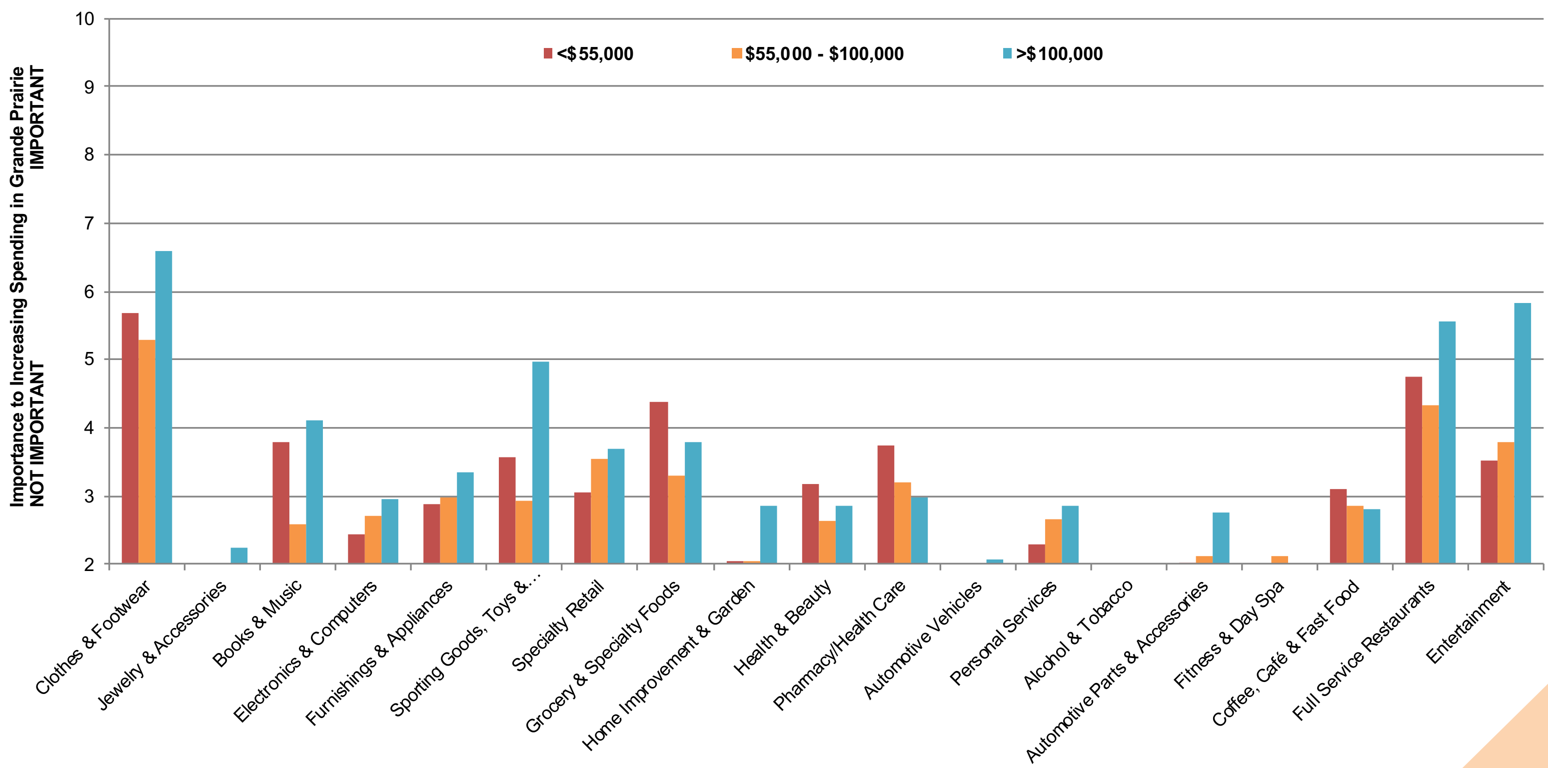


FIGURE 6.22

IMPORTANCE RATING TO INCREASE SPENDING BY RESPONDENT HOUSEHOLD INCOME



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

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

In fact, while that is true for some categories such as Home Improvement, Home Furnishings, Alcohol & Tobacco, Automotive and Personal Services, the income bracket comprising $55,000 to $100,000 exhibits the strong expenditure outlay in the city for Electronics, Sporting Goods, Books & Music and Cafe/Fast Food.

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

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

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

6.8 ONLINE SPENDING PATTERNS

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

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

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

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

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

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

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

FIGURE 6.23

PERCENTAGE OF ONLINE SPENDING BY SURVEY RESPONDENTS

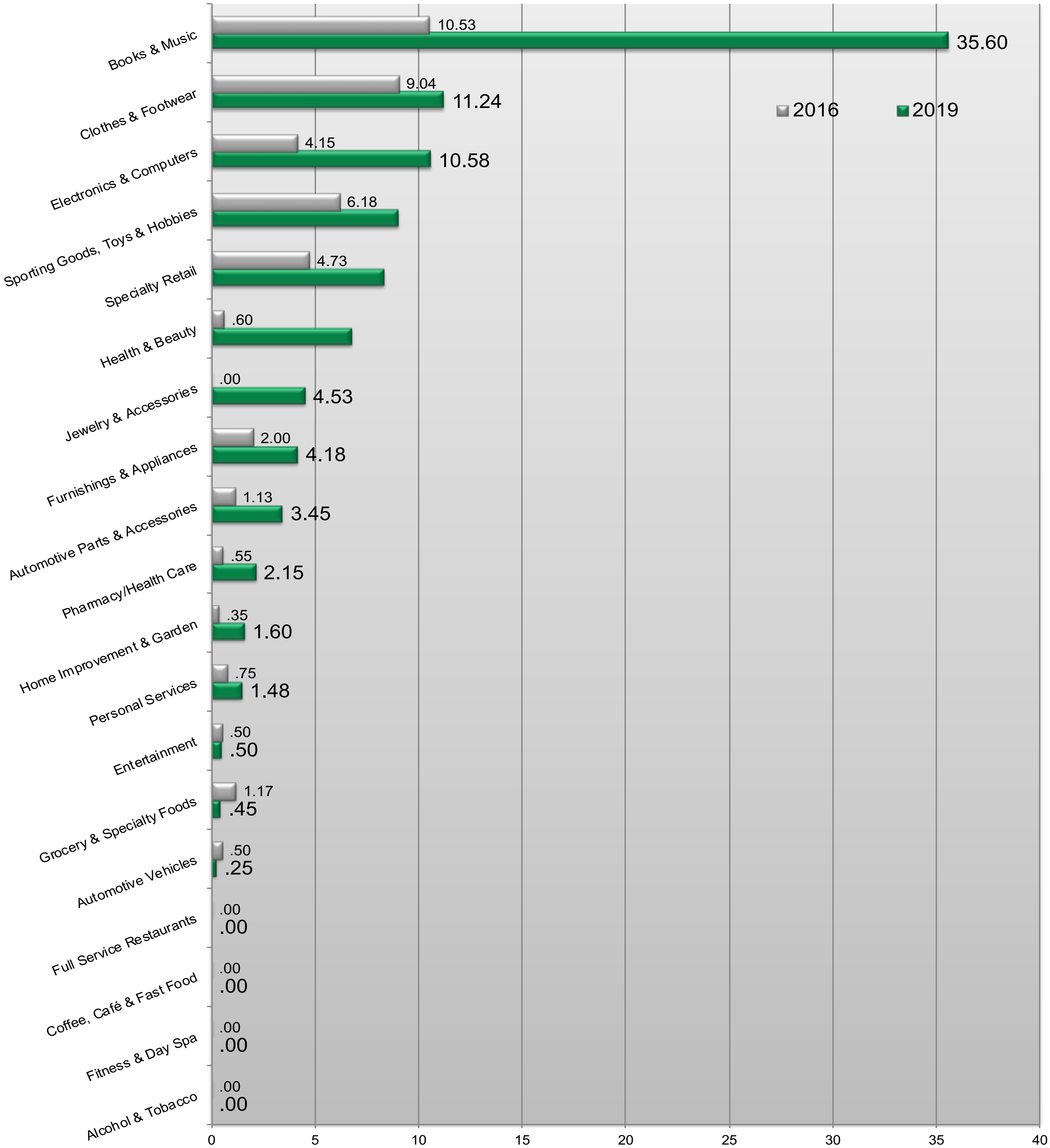
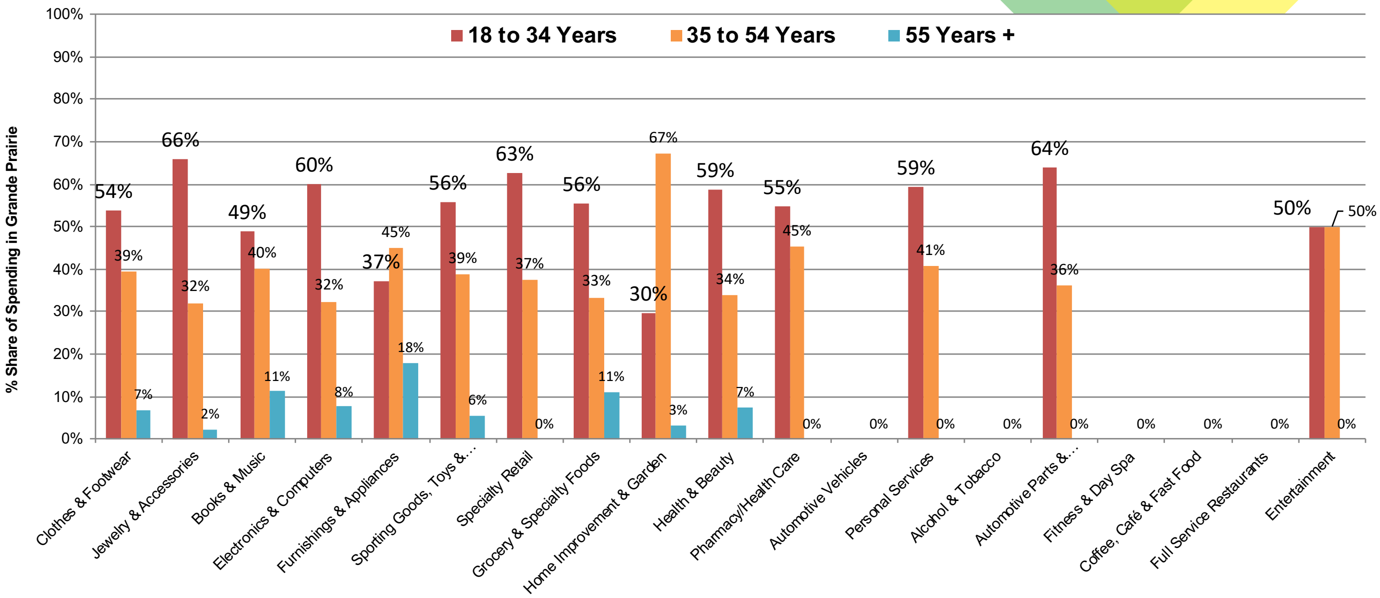


FIGURE 6.24

PERCENTAGE OF ONLINE SPENDING BY AGE COHORT



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

6.9 SUMMARY & IMPLICATIONS

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

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

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

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

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

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

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

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

Monaco Centre/Westgate, Wapiti Coffee Photo: FBM

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 295,000 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 contains just under 177,000 residents.

FACT - City of Grande Prairie could support over 5.24 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 younger median age compared to the Province.

FACT - City of Grande Prairie has a net INFLOW of $374 million in Retail Sales.

FACT - City of Grande Prairie's sales attraction and retention results in just under $90.6 million in categories that exhibit retail sales OUTFLOW (including auto).

FACT - City of Grande Prairie has a current residual demand for 1.06 million sf of retail space.

FACT - City of Grande Prairie could have support 500,000 sf of new retail space by 2032.

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

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

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

RETAIL PROSPECTS

FOOD & BEVERAGE / CONVENIENCES / SERVICES

COBS FRESH BREAD
IHOP
Olive Garden ITALIAN RESTAURANT
THE CHOPPED LEAF
Triple-O's WHITE SPOT
Oodle Noodle
Good Earth COFFEEHOUSE AND BAKERY
smashburger smash. sizzle. savor.
BURGER KING
TACO BELL
milestones GRILL + BAR
SOUTH ST. BURGER
MR. SUB
chili's
JOEY RESTAURANTS
CANADA'S PUB HUDSONS
Booster Juice
Mary Browns CHICKEN
OUTBACK STEAKHOUSE
JOSEPH RICHARD GROUP
大統華 T&T Supermarket
Red Lobster
WINE AND BEYOND SPIRITS BEER & MORE.
orangetheory FITNESS
GoodLife FITNESS

7 RETAIL PROSPECTS

FASHION, SPORTING GOODS, HOUSE & HOME, WELLNESS

American Eagle Outfitters ae.com
H&M
adidas
LUSH
West49
zumiez
Banana Republic
Roots
dynamite
Bench.
Indigo Books · Gifts · Kids
Atmosphere Camping • Hiking • Outdoors
SportChek
Tip Top Tailors
Victoria's Secret
Decathlon
Hockey Life prohockeylife.com
Spring
Jack & Jones
Arc'teryx
Levi's
buy buy BABY
ZARA
Structube
SoftMoc www.softmoc.com
ALDO
mattress mattress inc.
daniadown HOME
Running Room Ltd.
Browns

THIS PAGE LEFT INTENTIONALLY BLANK

RETAIL
Market & Gap Analysis

City of Grande Prairie

APPENDICES

FBM

PROUD TO BE AN ICSC MEMBER

THIS PAGE LEFT INTENTIONALLY BLANK

A APPENDIX | RETAIL INVENTORY

Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (sf)
100 Flavours Afro-Caribb Cuisine	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Quick Service F&B	1,250
After Hours Love	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	750
Alberta Computers	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Electronics & Appliances	5,000
Alberta Trophy (Sportswear Plus)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	1,250
Al's News	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Grocery, Convenience & Specialty Foods	1,000
Aurora Apparel	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Fashion, Apparel & Footwear	750
Bad Ass Jacks	Downtown - 97th Ave (100th St Station)	CENTRAL	Quick Service F&B	1,200
Bad Dog Tattoo	Downtown - 100th Ave	CENTRAL	Personal Services	1,000
Bama Furniture	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Furniture & Decor	14,000
Bar One	Downtown Core - 99th Ave	CENTRAL	Full Service Restaurants & Pubs	2,500
Bed Shoppe	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Furniture & Decor	7,500
Bello Stylez (was Barbershop)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	1,000
Better than Freds Billiards	Downtown Core - 99th Ave	CENTRAL	Arts & Entertainment	9,000
Black Dahlia Tattoo	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	1,000
Canadian Thai Restaurant	Downtown - 97th Ave (100th St Station)	CENTRAL	Full Service Restaurants & Pubs	1,200
Cannabis Fourteen	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Alcohol, Tobacco & Cannabis	1,750
Cards Board Game Cafe	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Quick Service F&B	1,000
Cash Canada Pawn	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	5,000
Central Barbershop	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	1,000
Centre Stage Dance Wear	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Fashion, Apparel & Footwear	1,250
Champion Gym	Downtown - south of 100th St	CENTRAL	Fitness & Leisure	3,600
CIBC	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Professional/Medical/Financial Service	4,000
Claude's Watch Repair	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	500
COOP Marketplace	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Grocery, Convenience & Specialty Foods	33,000
Coyote Moon Hemp	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Fashion, Apparel & Footwear	750
Creative Illusions Hair	Downtown - 101 Executive Place	CENTRAL	Personal Services	750
Cree8ive Ink Tattoo	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	750
Crouses Cleaners	Downtown Core - 99th Ave	CENTRAL	Personal Services	2,500
Curry's Jewelers	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Jewelry & Accessories	1,000
D Boutique	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Fashion, Apparel & Footwear	1,500
Dark Flavor Apparel	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Fashion, Apparel & Footwear	750
Denny's	Downtown Core - 99th Ave	CENTRAL	Full Service Restaurants & Pubs	3,500
Designs & Signs	Downtown - 100th Ave	CENTRAL	Professional/Medical/Financial Service	1,000
Diverse Dance Company	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Arts & Entertainment	1,000
Divine Nigerian & Ethiopian Cuisine	Downtown - Freestanding	CENTRAL	Full Service Restaurants & Pubs	2,000
Dominion Lending	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Professional/Medical/Financial Service	2,000
Don's Dining	Station 97	CENTRAL	Quick Service F&B	2,000
Earl's Kitchen & Bar	Downtown Core - 99th Ave	CENTRAL	Full Service Restaurants & Pubs	6,500
Eastside Kitchen	Hillside 94th St & 100th Ave	CENTRAL	Full Service Restaurants & Pubs	1,500
Edward Jones	Downtown - 98th Ave	CENTRAL	Professional/Medical/Financial Service	1,000
End Grain Woodwork	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Furniture & Decor	2,100
Eternity Jewelry	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Jewelry & Accessories	750
Factory Hair Studio	Downtown - 101 Ave	CENTRAL	Personal Services	750
Farmer's Market	Downtown - Freestanding (101 Ave)	CENTRAL	Grocery, Convenience & Specialty Foods	12,500
Fashionista	Downtown Core - Richmond Ave/100th Ave (City Ce	CENTRAL	Fashion, Apparel & Footwear	1,750
Fields of Wheat Boutique	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Fashion, Apparel & Footwear	1,000
Focus Bookeeping	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Professional/Medical/Financial Service	750
Focus Bookeeping	Downtown Core - 100th Ave - 10048 B	CENTRAL	Professional/Medical/Financial Service	1,750
Glow Collective	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	1,250
Golden Star Chinese Restaurant	Downtown - Freestanding (101 Ave)	CENTRAL	Full Service Restaurants & Pubs	7,000
GP Promotional Products	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	1,000
Grande Prairie Pet Shop	Downtown Core - 99th Ave (TowneCentre)	CENTRAL	Specialty Retail	2,300
Grande Prairie Pharmacy	Downtown Core - 97th Ave (Junction Point)	CENTRAL	Pharmacy	1,500
Grant Berg Gallery	Downtown - 214 Place	CENTRAL	Arts & Entertainment	500
Heart of the Peace Gourmet Foods	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Grocery, Convenience & Specialty Foods	1,000
Heiho Dojo	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	1,500
Hi Tech Business Systems (Relocated)	Downtown Core - Richmond Ave/99th Ave	CENTRAL	Specialty Retail	11,000
HJ's Bowling	Downtown - Tuscan Square	CENTRAL	Arts & Entertainment	9,000
Homesteader Health	Downtown Core - 99th Ave (Crystal Square)	CENTRAL	Grocery, Convenience & Specialty Foods	3,750
Imperial Garden Collectibles	Downtown - 100th Ave	CENTRAL	Specialty Retail	1,500
Imperial Garden Restaurant	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Full Service Restaurants & Pubs	2,500
Indigo Jewelry	Freestanding	CENTRAL	Jewelry & Accessories	1,000
Just Beachy	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Health & Beauty	1,250
Kids Incredible Sensory & Baby Boutique	Downtown Core - 100th Ave - 10029	CENTRAL	Specialty Retail	1,800

Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (sf)
Liquor For Less	Downtown Core - 97th Ave	CENTRAL	Alcohol, Tobacco & Cannabis	3,100
Liquor Store	Downtown Core - 99th Ave (TowneCentre)	CENTRAL	Alcohol, Tobacco & Cannabis	1,000
Long & McQuade	Downtown Core - 97th Ave	CENTRAL	Toys & Hobbies	10,500
Lucky Leaf Cannabis	100 Street	CENTRAL	Alcohol, Tobacco & Cannabis	1,000
Lush Nail & Spa	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	1,500
Luxe Flowershop & Espresso Bar	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	1,000
Makers Market	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	750
Marlin Travel	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	1,250
Menzies Printers	Downtown Core - 97th Ave	CENTRAL	Specialty Retail	4,000
Mermaid Society	214 Place	CENTRAL	Personal Services	1,000
Midwest Appliances	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Electronics & Appliances	13,300
Milano for Men	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Fashion, Apparel & Footwear	2,700
Mission Thrift Store	Downtown Core - 99th Ave (TowneCentre)	CENTRAL	Specialty Retail	7,500
Money Mart	Downtown Core - 97th Ave (Safri Centre)	CENTRAL	Personal Services	750
Nest by Chiks Design Group	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Furniture & Decor	1,000
New York Salon & Spa	Downtown - 101 Executive Place	CENTRAL	Personal Services	1,250
Next Level VR Arcade	Downtown Core - Richmond Ave/100th Ave (City Ce	CENTRAL	Arts & Entertainment	1,500
Nolan Shoe Repair	Downtown Core - 99th Ave	CENTRAL	Personal Services	500
Northern Lights Indoor Garden Centre	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Home Improvement & Gardening	1,000
Off the Wheaton Path	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Grocery, Convenience & Specialty Foods	1,250
One Beauty Academy	Downtown Core - 100th Ave - 10119 A	CENTRAL	Personal Services	3,000
Panago Pizza	Downtown - 97th Ave (100th St Station)	CENTRAL	Quick Service F&B	1,200
Peace Halal Market	Downtown - 101 Ave	CENTRAL	Grocery, Convenience & Specialty Foods	1,000
Picture Perfect Framing/ Rabbit Hole	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Furniture & Decor	2,000
Piece Fabric Co	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	2,500
Pilates Barre	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Fitness & Leisure	1,500
Pink Rain Hair	Downtown Core - Richmond Ave/100th Ave (City Ce	CENTRAL	Personal Services	750
Pita Pit	Downtown Core - 97th Ave	CENTRAL	Quick Service F&B	1,000
Pizza 73	Downtown Core - 99th Ave (Crystal Square)	CENTRAL	Quick Service F&B	1,250
Pizza Plus & Donair/ Biggs	Downtown Core - 97th Ave	CENTRAL	Quick Service F&B	1,000
Planet Beach	Downtown - Tuscan Square	CENTRAL	Personal Services	1,000
Primitive Lane Country Store	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	2,500
Pure Home Design	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Fashion, Apparel & Footwear	2,000
Ramona's Pizza	Railtown 84th & Resources Rd	CENTRAL	Full Service Restaurants & Pubs	3,000
RBC	Junction Point Village	CENTRAL	Professional/Medical/Financial Service	13,000
Real Deals on Home Decor	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Furniture & Decor	1,500
Retro Relics	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	500
Richmond Dry Cleaners	Downtown - 101 Executive Place	CENTRAL	Personal Services	1,500
Rocky Mountain Chocolate	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Grocery, Convenience & Specialty Foods	
Sawmill Restaurant	Downtown - 101 Ave	CENTRAL	Full Service Restaurants & Pubs	10,000
Scotiabank	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Professional/Medical/Financial Service	5,100
Servus Credit Union	Downtown Core - 99th Ave	CENTRAL	Professional/Medical/Financial Service	7,000
Shark Club	Downtown Core - 99th Ave	CENTRAL	Full Service Restaurants & Pubs	8,500
She Mann's Styling	Downtown Core - 99th Ave	CENTRAL	Personal Services	750
Sheer Illusion	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	1,000
Sheperds Fold Books	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Books, Media & Computers	2,000
Simplify Accounting	Downtown Core - 99th Ave	CENTRAL	Professional/Medical/Financial Service	2,000
Simply Vines	Downtown - 101 St	CENTRAL	Alcohol, Tobacco & Cannabis	1,200
Snapshot Studio	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	1,000
Sole Addiction Shoes	Downtown Core - Richmond Ave/100th Ave (City Ce	CENTRAL	Fashion, Apparel & Footwear	2,000
Source Adult	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Specialty Retail	1,000
Southside Laundromat	Downtown - south of 100th St	CENTRAL	Personal Services	1,200
Speedy Cash	Downtown Core - 99th Ave (Crystal Square)	CENTRAL	Personal Services	1,250
Statix Hair Skin & Nails	Downtown Core - 97th Ave	CENTRAL	Personal Services	1,000
Styles & Smiles	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Personal Services	750

A

Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (sf)
T Sedore Photography	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Electronics & Appliances	750
Taj Grill & Bar	Downtown Core - 97th Ave (Safri Centre)	CENTRAL	Full Service Restaurants & Pubs	2,500
The Colorbox / Platinum Hair	Downtown - 101 Ave	CENTRAL	Personal Services	750
The Industry (was Breakers Sports Lounge)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Full Service Restaurants & Pubs	3,000
The Look Hair Design	Downtown - 100th Ave	CENTRAL	Personal Services	1,500
Tim Hortons	Freestanding 100th St (west side)	CENTRAL	Quick Service F&B	2,800
Tito's Mediterranean & Western Cuisine	Downtown - 101 Executive Place	CENTRAL	Full Service Restaurants & Pubs	1,500
Towne Centre Bar & Grill	Downtown Core - 99th Ave (TowneCentre)	CENTRAL	Full Service Restaurants & Pubs	2,500
Towne Centre Golf Centre/Nevada Bob's	Downtown Core - 99th Ave (TowneCentre)	CENTRAL	Sporting Goods	12,000
Towne Centre Laundry	Downtown - 97th Ave (100th St Station)	CENTRAL	Personal Services	2,500
Twisters Pizza	Downtown Core - 97th Ave (Safri Centre)	CENTRAL	Quick Service F&B	750
URBN Leaf Cannabis	Hillside 94th St & 100th Ave	CENTRAL	Alcohol, Tobacco & Cannabis	1,500
URBN Liquor	Hillside 94th St & 100th Ave	CENTRAL	Alcohol, Tobacco & Cannabis	3,000
VACANT	Downtown Core - 97th Ave	CENTRAL	**VACANT**	4,000
VACANT	Downtown Core - 99th Ave (Crystal Square)	CENTRAL	**VACANT**	2,500
VACANT	Downtown Core - 100th Ave - 10119 B	CENTRAL	**VACANT**	2,000
VACANT	Downtown Core - Richmond Ave/100th Ave	CENTRAL	**VACANT**	1,600
VACANT	Resources Road	CENTRAL	**VACANT**	1,313
VACANT	Downtown - Tuscan Square	CENTRAL	**VACANT**	1,000
VACANT	Downtown Core - 100th Ave - 10118	CENTRAL	**VACANT**	750
VACANT	Downtown Core - Richmond Ave/100th Ave	CENTRAL	**VACANT**	2,500
VACANT	Downtown Core - Richmond Ave/100th Ave (City C	CENTRAL	**VACANT**	2,000
VACANT	Downtown Core - Richmond Ave/100th Ave	CENTRAL	**VACANT**	1,500
VACANT	Downtown Core - Richmond Ave/100th Ave	CENTRAL	**VACANT**	750
VACANT (was Acropolis Greek Restaurant)	Downtown - 101 Ave	CENTRAL	**VACANT**	5,000
VACANT (was CCSI)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	**VACANT**	3,663
VACANT (was GP Therapeutic)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	**VACANT**	750
VACANT (was Grant Berg Gallery)	Downtown Core - Richmond Ave/100th Ave (City C	CENTRAL	**VACANT**	1,000
VACANT (was Image Design)	Downtown Core - Richmond Ave/100th Ave	CENTRAL	**VACANT**	1,250
VACANT 102	Centre 100 Plaza	CENTRAL	**VACANT**	1,440
VACANT 103	Centre 100 Plaza	CENTRAL	**VACANT**	2,880
Vianne Mobile Business Centre	Downtown Core - 100th Ave - 10006 A	CENTRAL	Professional/Medical/Financial Service	1,350
Victoria's Attic	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Fashion, Apparel & Footwear	1,250
Vivacious Nails	Downtown Core - 100th Ave - 10009 B	CENTRAL	Personal Services	1,000
Wally's Kitchen	Downtown - south of 100th St	CENTRAL	Quick Service F&B	1,800
Wally's Mini Mart	Downtown - south of 100th St	CENTRAL	Grocery, Convenience & Specialty Foods	2,500
Wendy's	Downtown Core - 99th Ave	CENTRAL	Quick Service F&B	2,600
Winks Convenience	Downtown - 97th Ave	CENTRAL	Grocery, Convenience & Specialty Foods	2,000
Wonderland Toy & Hobby	Downtown Core - Richmond Ave/100th Ave	CENTRAL	Toys & Hobbies	2,000

Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (sf)
Animal First Clinic	Crystal Lake 92nd St & 116th Ave	EAST	Professional/Medical/Financial Service	1,750
Aurora Eye Care	Cobblestone Lane 92nd St & 100th Ave	EAST	Personal Services	3,000
Busters Pizza & Donair	Cobblestone Lane 92nd St & 100th Ave	EAST	Quick Service F&B	1,500
Ciao Bella Spa	Crystal Lake 92nd St & 116th Ave	EAST	Personal Services	1,000
Circle K Convenience	92nd St & 92nd Ave NEW	EAST	Grocery, Convenience & Specialty Foods	1,000
Circle K Convenience	96th St & 116th Ave	EAST	Grocery, Convenience & Specialty Foods	1,250
Circle K Convenience	Lakeland Plaza 91st St & 132nd Ave	EAST	Grocery, Convenience & Specialty Foods	2,000
East Star Convenience	92nd St & 100th Ave (NE Corner)	EAST	Grocery, Convenience & Specialty Foods	1,500
EDO Japan	Cobblestone Lane 92nd St & 100th Ave	EAST	Quick Service F&B	1,000
Europa Deli	Crystal Lake 92nd St & 116th Ave	EAST	Grocery, Convenience & Specialty Foods	1,000
Fabutan	92nd St & 100th Ave (NE Corner)	EAST	Personal Services	1,000
Fire & Flower Cannabis	92 Ave	EAST	Alcohol, Tobacco & Cannabis	1,250
FreshCo	Cobblestone Lane 92nd St & 100th Ave	EAST	Grocery, Convenience & Specialty Foods	30,000
Good To Grow	Crystal Lake 92nd St & 116th Ave	EAST	Specialty Retail	1,000
GP International Foods	Crystal Lake 92nd St & 116th Ave	EAST	Grocery, Convenience & Specialty Foods	2,000
Liquor Depot	92nd St & 100th Ave (NE Corner)	EAST	Alcohol, Tobacco & Cannabis	2,000
Liquor Depot	92nd St & 92nd Ave NEW	EAST	Alcohol, Tobacco & Cannabis	1,500
Liquor Depot	Cobblestone Lane 92nd St & 100th Ave	EAST	Alcohol, Tobacco & Cannabis	2,500
M&M Meat Shops	Cobblestone Lane 92nd St & 100th Ave	EAST	Grocery, Convenience & Specialty Foods	1,000
Mac's Convenience	96th St & 100th Ave	EAST	Grocery, Convenience & Specialty Foods	2,500
Mary Brown's Chicken	Cobblestone Lane 92nd St & 100th Ave	EAST	Quick Service F&B	1,000
Mexican Restaurant	Cobblestone Lane 92nd St & 100th Ave	EAST	Quick Service F&B	1,500
Mystic Dragon Vape	92nd St & 100th Ave (NE Corner)	EAST	Alcohol, Tobacco & Cannabis	1,250
New Roastery Cafe	92nd St & 100th Ave (NE Corner)	EAST	Quick Service F&B	1,500
Noelle Mirabella Photo	Crystal Lake 92nd St & 116th Ave	EAST	Specialty Retail	1,000
Oriental Wok	Cobblestone Lane 92nd St & 100th Ave	EAST	Quick Service F&B	1,000
Peppermint Twist Hair & Design	93rd St & 100th Ave (NE Corner)	EAST	Personal Services	1,000
Pet Value	Cobblestone Lane 92nd St & 100th Ave	EAST	Specialty Retail	2,500
Pizza Experts	92nd St & 100th Ave (NE Corner)	EAST	Quick Service F&B	1,000
Plantlife	Cobblestone Lane 92nd St & 100th Ave	EAST	Alcohol, Tobacco & Cannabis	1,500
Prairie Nails	93rd St & 100th Ave (NE Corner)	EAST	Personal Services	1,000
Ramona's Pizza	Lakeland Plaza 91st St & 132nd Ave	EAST	Quick Service F&B	1,000
Royal Spirits	Lakeland Plaza 91st St & 132nd Ave	EAST	Alcohol, Tobacco & Cannabis	2,000
Shoppers Drug Mart	Cobblestone Lane 92nd St & 100th Ave	EAST	Pharmacy	15,000
Snap Fitness	Cobblestone Lane 92nd St & 100th Ave	EAST	Fitness & Leisure	5,000
Starbucks	Cobblestone Lane 92nd St & 100th Ave	EAST	Quick Service F&B	2,000
Subway	92nd St & 100th Ave (NE Corner)	EAST	Quick Service F&B	1,500
Subway	Lakeland Plaza 91st St & 132nd Ave	EAST	Quick Service F&B	1,000
TD Bank	Cobblestone Lane 92nd St & 100th Ave	EAST	Professional/Medical/Financial Service	3,500
Tim Hortons	92nd St & 92nd Ave NEW	EAST	Quick Service F&B	2,000
Winks Mountainview Groceries	Mountainview 95th St & 108th Ave	EAST	Grocery, Convenience & Specialty Foods	2,300

A

Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (sf)
A&W	Freestanding	NORTH	Quick Service F&B	3,400
A&W	Prairie Mall	NORTH	Quick Service F&B	389
Aarons Appliances	Strip Centre 100th St (east side)	NORTH	Furniture & Decor	7,000
Action Car & Truck (was Custom Truck Parts)	Freestanding	NORTH	Auto Parts & Accessories	15,000
Action Sportswear	Prairie Mall	NORTH	Fashion, Apparel & Footwear	4,900
Amazing Nails & Spa	Strip Centre 100th St (east side)	NORTH	Personal Services	1,500
Amish Furniture Home & Health	Freestanding	NORTH	Furniture & Decor	1,500
Arby's	Freestanding	NORTH	Quick Service F&B	3,400
Ardene	Prairie Mall	NORTH	Jewelry & Accessories	17,000
Ashley Furniture	Royal Oaks - Freestanding	NORTH	Furniture & Decor	20,000
Asian Variety Store	Bell Tower Plaza	NORTH	Grocery, Convenience & Specialty Foods	600
ATB Financial	Canadian Tire Plaza (east side of 99th St)	NORTH	Professional/Medical/Financial Service	5,600
Ava's Pizza	Strip Centre 100th St (east side)	NORTH	Quick Service F&B	750
Bar Burrito	Trader Ridge 100th Street	NORTH	Quick Service F&B	1,175
Bartons Archery & Hunting	Strip Centre (west side of 99th south of 116th)	NORTH	Sporting Goods	5,300
Basics Hair Care	KFC Plaza 100th St (east side)	NORTH	Personal Services	1,000
Bath & Body Works	Prairie Mall	NORTH	Health & Beauty	2,923
Beach Bumz Tanning	Centre 100 Plaza	NORTH	Personal Services	1,000
Beachcomber Hot Tubs	Freestanding	NORTH	Home Improvement & Gardening	8,000
Bell	Prairie Mall	NORTH	Electronics & Appliances	1,229
Below the Belt	Prairie Mall	NORTH	Fashion, Apparel & Footwear	2,602
Ben Moss	Prairie Mall	NORTH	Jewelry & Accessories	893
Benjamin Moore	Freestanding (100th St north of 116th west)	NORTH	Home Improvement & Gardening	2,500
Benjamin Moore Paints	100th Street	NORTH	Home Improvement & Gardening	1,500
Bentley	Prairie Mall	NORTH	Specialty Retail	1,545
Blackmans Butcher Shop	Strip Centre (west side of 99th south of 116th)	NORTH	Grocery, Convenience & Specialty Foods	6,000
Bliss Salon & Spa	Northridge Business Park	NORTH	Personal Services	4,000
BMO	Prairie Mall	NORTH	Professional/Medical/Financial Service	567
Boathouse	Prairie Mall	NORTH	Fashion, Apparel & Footwear	5,146
Bone n Biscuit	Trader Ridge 100th Street	NORTH	Specialty Retail	1,175
Bootlegger	Prairie Mall	NORTH	Fashion, Apparel & Footwear	4,162
Boston Pizza	Freestanding	NORTH	Full Service Restaurants & Pubs	7,000
Bright Beginning Child Care	Prairie Plaza	NORTH	Personal Services	3,000
Budding Creations	116 Ave	NORTH	Alcohol, Tobacco & Cannabis	1,000
Bullets & Broadhead Shooting Centre	Northridge Business Park	NORTH	Arts & Entertainment	10,000
Burger King	Freestanding	NORTH	Quick Service F&B	3,500
Canna Cabana	Prairie Mall	NORTH	Alcohol, Tobacco & Cannabis	1,093
Canna Cabana	100 Street	NORTH	Alcohol, Tobacco & Cannabis	1,000
Canopy West	Strip Centre 100th St (west side)	NORTH	Auto Parts & Accessories	11,000
Cap-It	Freestanding (100th St north of 116th west)	NORTH	Auto Parts & Accessories	5,000
Carpet One	Miscellaneous 100th St (west side)	NORTH	Furniture & Decor	5,000
Carpet Superstores	Royal Oaks	NORTH	Furniture & Decor	5,000
Cash Canada	Strip Centre 100th St (east side)	NORTH	Personal Services	2,000
Cash Stop	Freestanding	NORTH	Personal Services	750
Centre Stage Dance Wear	Prairie Plaza North	NORTH	Fashion, Apparel & Footwear	1,000
Chatters	Prairie Mall	NORTH	Personal Services	2,844
Chiklets Junior Salon &Spa	Strip Centre 100th St (west side)	NORTH	Personal Services	1,250
Children's Place	Prairie Mall	NORTH	Fashion, Apparel & Footwear	4,443
Circle K Convenience	Miscellaneous 100th St (west side)	NORTH	Grocery, Convenience & Specialty Foods	2,500
City Furniture	Northridge Business Park	NORTH	Furniture & Decor	20,000

Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (sf)
Claire's	Prairie Mall	NORTH	Jewelry & Accessories	1,021
Cloverdale Paint	Centre 100 Plaza	NORTH	Home Improvement & Gardening	2,000
Coles	Prairie Mall	NORTH	Books, Media & Computers	3,436
Comm Vest Realty	Strip Centre (east side of 99th south of 116th)	NORTH	Professional/Medical/Financial Service	1,000
Comm Vest Realty	KFC Plaza 100th St (east side)	NORTH	Professional/Medical/Financial Service	1,000
COOP Convenience Store	Royal Oak Strip Centre	NORTH	Grocery, Convenience & Specialty Foods	1,000
COOP Maketplace	Trader Ridge 100th Street	NORTH	Grocery, Convenience & Specialty Foods	34,126
Copper Trail Merchants	Prairie Mall	NORTH	Furniture & Decor	3,780
Craze Mania	Prairie Mall	NORTH	Toys & Hobbies	1,546
Create a Portrait	Prairie Plaza North	NORTH	Personal Services	1,500
Creative Emporium Tattoo	Bell Tower Plaza	NORTH	Personal Services	600
Creative Treasures Framing	Northridge Business Centre	NORTH	Furniture & Decor	750
Crowned Beauty Wigs	Prairie Mall	NORTH	Health & Beauty	1,761
Culligan Water	Freestanding	NORTH	Specialty Retail	1,500
Culture	Prairie Mall	NORTH	Jewelry & Accessories	1,015
Dairy Queen	Miscellaneous 100th St (west side)	NORTH	Quick Service F&B	3,000
Delta 9 Cannabis	Northridge Business Park	NORTH	Alcohol, Tobacco & Cannabis	1,000
Denon Home Theatre	Prairie Plaza	NORTH	Electronics & Appliances	6,000
Denon Home Theatre	Prairie Plaza	NORTH	Home Improvement & Gardening	2,000
Dentist	Trader Ridge 100th Street	NORTH	Professional/Medical/Financial Service	1,175
DNI Cleaning Supplies	Freestanding beside Nu Floors	NORTH	Home Improvement & Gardening	2,000
Dollarama	Centre 100 Plaza	NORTH	Specialty Retail	12,000
Dollarama	Prairie Mall	NORTH	Specialty Retail	10,006
Dons Menswear	Bell Tower Plaza	NORTH	Fashion, Apparel & Footwear	2,000
Doug Marshall Chevrolet Cadillac	100th Street	NORTH	Auto/RV/Motorsports Dealership	30,000
Driving Force Vehicle Rentals/Sales/Leasing	100th Street	NORTH	Auto/RV/Motorsports Dealership	4,500
Eastlink	Prairie Mall	NORTH	Electronics & Appliances	1,263
Easy Home	Centre 100 Plaza	NORTH	Furniture & Decor	3,000
Echo Video Unlimited	Strip Centre 100th St (east side)	NORTH	Electronics & Appliances	3,000
Eclipse	Prairie Mall	NORTH	Fashion, Apparel & Footwear	2,178
EDO	Prairie Mall	NORTH	Quick Service F&B	385
EDO Japan	Trader Ridge 100th Street	NORTH	Quick Service F&B	1,000
Edward Jones	Northridge NEW	NORTH	Professional/Medical/Financial Service	1,000
Edward Jones	Northridge Business Centre	NORTH	Professional/Medical/Financial Service	1,500
Edwards Factory Outlet	Freestanding	NORTH	Fashion, Apparel & Footwear	8,000
Enterprise Car Rental	Freestanding	NORTH	Auto/RV/Motorsports Dealership	1,500
Ernie's Fitness Experts	Ernie's Plaza	NORTH	Sporting Goods	17,300
Ernie's Sports Experts	Ernie's Plaza	NORTH	Sporting Goods	32,200
Evening Shade Tatoo	Miscellaneous 100th St (west side)	NORTH	Personal Services	1,000
Extreme RC	Strip Centre 100th St (west side)	NORTH	Toys & Hobbies	750
Fine Line Carpets	Northridge Business Park	NORTH	Furniture & Decor	8,000
Flaman Fitness	Prairie Plaza	NORTH	Fitness & Leisure	3,000
Flip Flop Shop	Prairie Mall	NORTH	Fashion, Apparel & Footwear	1,093
Fountain Tire	Freestanding	NORTH	Auto Parts & Accessories	12,000
Fourward Sports (FOR SALE)	Freestanding 100th St (east side)	NORTH	Sporting Goods	6,000
Freshly Squeezed	Prairie Mall	NORTH	Quick Service F&B	832
Freson Bros	Canadian Tire Plaza (east side of 99th St)	NORTH	Grocery, Convenience & Specialty Foods	35,000
FYIdoctors	Prairie Plaza North	NORTH	Personal Services	8,000
Garage	Prairie Mall	NORTH	Fashion, Apparel & Footwear	3,603
Giant Tiger	Centre 100 Plaza	NORTH	Grocery, Convenience & Specialty Foods	21,000

A

Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (sf)
Global Pet Foods	Royal Oaks	NORTH	Specialty Retail	3,000
GP Therapeutic Massage (was Marcy's Flower)	Royal Oak Strip Centre	NORTH	Professional/Medical/Financial Service	1,000
Grande Prairie Asian Massage	Bell Tower Plaza	NORTH	Professional/Medical/Financial Service	1,000
Grande Prairie Nissan	Bypass	NORTH	Auto/RV/Motorsports Dealership	12,200
Grande Prairie Upholstery	Miscellaneous 100th St (west side)	NORTH	Furniture & Decor	1,000
Great Canadian Liquor Company (Quality Inn)	Northridge Business Park	NORTH	Alcohol, Tobacco & Cannabis	3,000
Growers Direct Flowers	Bell Tower Plaza	NORTH	Specialty Retail	1,500
Haircraft (was Soul Remedies)	Prairie Plaza	NORTH	Personal Services	1,500
Hallmark	Prairie Mall	NORTH	Specialty Retail	1,932
Harley Davidson	Prairie Ridge	NORTH	Auto/RV/Motorsports Dealership	10,000
Haze Cannabis North	100 Street	NORTH	Alcohol, Tobacco & Cannabis	1,000
Headroom Salon	Prairie Ridge	NORTH	Personal Services	4,000
Hearth & Home	Northridge Business Park	NORTH	Furniture & Decor	2,000
Hernami Goldsmith & Jewelry	Prairie Plaza	NORTH	Jewelry & Accessories	1,250
Home Hardware	Freestanding 100th St (east side)	NORTH	Home Improvement & Gardening	20,000
Hong Fah Thai	Royal Oaks	NORTH	Quick Service F&B	2,000
Hong Kong House Chinese	KFC Plaza 100th St (east side)	NORTH	Full Service Restaurants & Pubs	1,500
Horangi TaeKwonDo	Strip Centre 100th St (east side)	NORTH	Fitness & Leisure	2,000
HR Block	KFC Plaza 100th St (east side)	NORTH	Professional/Medical/Financial Service	1,000
Humpty's Family Restaurant	Freestanding	NORTH	Full Service Restaurants & Pubs	2,000
Inkubus Tatoo	Strip Centre (east side of 99th south of 116th)	NORTH	Fitness & Leisure	750
Investors Group	Centre 100 Plaza	NORTH	Professional/Medical/Financial Service	2,000
Jersey City	Prairie Mall	NORTH	Sporting Goods	1,507
Joey's Seafood	Royal Oak Strip Centre	NORTH	Full Service Restaurants & Pubs	2,500
Jugo Juice	Prairie Mall	NORTH	Quick Service F&B	200
Just Cozy	Prairie Mall	NORTH	Fashion, Apparel & Footwear	2,257
Kal Tire	Freestanding	NORTH	Auto Parts & Accessories	5,000
Keddie's Tack & Western Wear	Freestanding	NORTH	Specialty Retail	14,000
Ken Sargent Buick GMC Pontiac	100th Street	NORTH	Auto/RV/Motorsports Dealership	27,000
KFC	KFC Plaza 100th St (east side)	NORTH	Quick Service F&B	2,300
Koodoo	Prairie Mall	NORTH	Electronics & Appliances	200
Kurves	Prairie Mall	NORTH	Personal Services	735
La Senza	Prairie Mall	NORTH	Fashion, Apparel & Footwear	3,031
La Vie en Rose	Prairie Mall	NORTH	Fashion, Apparel & Footwear	3,681
Lang Locksmiths	Strip Centre 100th St (east side)	NORTH	Personal Services	2,000
Laura / Laura Plus	Prairie Mall	NORTH	Fashion, Apparel & Footwear	4,225
Leather Plus	Prairie Mall	NORTH	Fashion, Apparel & Footwear	1,263
Liberty Tax Service	Central Square 100th St (west side)	NORTH	Professional/Medical/Financial Service	1,000
Liquor Barn	Strip Centre 100th St (west side)	NORTH	Alcohol, Tobacco & Cannabis	4,000
Little Caesars	Northridge Business Park	NORTH	Quick Service F&B	1,000
Lube City Oil	Freestanding	NORTH	Auto Parts & Accessories	3,200
Lucid Cannabis	Trader Ridge 100th Street	NORTH	Alcohol, Tobacco & Cannabis	1,175
Lululemon	Prairie Mall	NORTH	Fashion, Apparel & Footwear	3,569
Lynns Alterations	Bell Tower Plaza	NORTH	Personal Services	1,200
Major's Family Restaurant (was Pizza Hut)	Freestanding (100th St north of 116th west)	NORTH	Full Service Restaurants & Pubs	4,000
Mall Storage	Prairie Mall	NORTH	N/A	15,867
Mama Panda Buffet	Freestanding	NORTH	Full Service Restaurants & Pubs	3,500
Manhandler Barber Shop	Prairie Mall	NORTH	Personal Services	1,100
Marble Slab Creamery	Royal Oak Strip Centre	NORTH	Quick Service F&B	1,000
Mark's	Prairie Mall	NORTH	Fashion, Apparel & Footwear	5,827

Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (sf)
Marshalls	Prairie Mall	NORTH	Fashion, Apparel & Footwear	23,857
McDonalds	Northridge Business Park	NORTH	Quick Service F&B	4,000
McGoverns RV & Marine	100th Street	NORTH	Auto/RV/Motorsports Dealership	7,500
Meat Shop on Main	Freestanding	NORTH	Grocery, Convenience & Specialty Foods	3,000
Medicinne Shoppe	Northridge NEW	NORTH	Pharmacy	1,500
Merle Norman	Strip Centre (east side of 99th south of 116th)	NORTH	Health & Beauty	1,250
Michael Hill Jewelers	Prairie Mall	NORTH	Jewelry & Accessories	988
Michael's Flooring	Strip Centre 100th St (east side)	NORTH	Home Improvement & Gardening	10,000
Micro Computers Plus	Royal Oaks	NORTH	Electronics & Appliances	5,000
Mobile Care	Prairie Mall	NORTH	Electronics & Appliances	982
Mobilinq	Prairie Mall	NORTH	Electronics & Appliances	658
Modern Beauty Supplies	Centre 100 Plaza	NORTH	Health & Beauty	3,000
Motion (mobility aids for physically challenged)	Prairie Mall	NORTH	Specialty Retail	2,563
Motivations Bridal Creations & Tailoring	Strip Centre (east side of 99th south of 116th)	NORTH	Personal Services	1,500
Motley Que Barbeque	Freestanding	NORTH	Home Improvement & Gardening	2,500
Mountain Warehouse	Prairie Mall	NORTH	Fashion, Apparel & Footwear	3,476
Moxie's Classic Grill	Prairie Mall	NORTH	Full Service Restaurants & Pubs	6,233
Mr. Mikes	Northridge Business Park	NORTH	Full Service Restaurants & Pubs	8,000
Mr. Pretzel	Prairie Mall	NORTH	Quick Service F&B	313
NaaN'amaste	Prairie Mall	NORTH	Quick Service F&B	402
Nails & Waxing	Central Square 100th St (west side)	NORTH	Personal Services	750
Nails n More	Strip Centre (east side of 99th south of 116th)	NORTH	Health & Beauty	750
New York Fries	Prairie Mall	NORTH	Quick Service F&B	268
Nor-lan Chrysler Dodge Jeep RAM NEW Location	100th Street	NORTH	Auto/RV/Motorsports Dealership	62,250
Northern Gold & Diamonds	Bell Tower Plaza	NORTH	Jewelry & Accessories	1,500
Northern Heating & Fireplace	Strip Centre 100th St (east side)	NORTH	Home Improvement & Gardening	2,500
Northern Living Spaces	Strip Centre 100th St (west side)	NORTH	Furniture & Decor	4,200
Northgate Honda New & Used	100th Street	NORTH	Auto/RV/Motorsports Dealership	21,500
Now The Den (was Tony Romas)	Royal Oaks	NORTH	Full Service Restaurants & Pubs	7,000
Nu Floors Outlet	Freestanding	NORTH	Home Improvement & Gardening	3,000
OMG Cupcakes	KFC Plaza 100th St (east side)	NORTH	Quick Service F&B	750
Once Upon a Child (was Northern Blooms)	Royal Oak Strip Centre	NORTH	Specialty Retail	750
OPA	Prairie Mall	NORTH	Quick Service F&B	436
Optometrist	KFC Plaza 100th St (east side)	NORTH	Professional/Medical/Financial Service	1,000
Orthodontics North (was NDHC Dental)	Prairie Plaza	NORTH	Professional/Medical/Financial Service	2,500
Padrino's (Best Western)	Royal Oaks Best Western Hotel	NORTH	Full Service Restaurants & Pubs	3,000
Panago	Trader Ridge 100th Street	NORTH	Quick Service F&B	1,175
Paris Jewelers	Prairie Mall	NORTH	Jewelry & Accessories	1,443
Partners Naturally Dog Shop	Strip Centre 100th St (east side)	NORTH	Specialty Retail	1,500
Pat's Auto Parts	Freestanding	NORTH	Auto Parts & Accessories	10,000
Peace Country Graphics	Bell Tower Plaza	NORTH	Specialty Retail	2,000
People's Jewelers	Prairie Mall	NORTH	Jewelry & Accessories	2,048
Pet Value	Centre 100 Plaza	NORTH	Specialty Retail	3,400
Pharmasave Medical Clinic	Oak Ridge Business Centre (NEW)	NORTH	Pharmacy	1,500
Pho House	Oak Ridge Business Centre (NEW)	NORTH	Full Service Restaurants & Pubs	2,198
Pho One	Strip Centre 100th St (east side)	NORTH	Full Service Restaurants & Pubs	2,000
Pinoy Sari Sar House	10017 110 Ave	NORTH	Grocery, Convenience & Specialty Foods	500
Pizza Hut (was Tennesee Jack's Chicken & Ribs)	Royal Oak Strip Centre	NORTH	Quick Service F&B	1,500
Plaza Dental	Prairie Plaza	NORTH	Professional/Medical/Financial Service	2,000
Poko Popcorn	Prairie Mall	NORTH	Quick Service F&B	430
Popeye's Chicken	Trader Ridge 100th Street	NORTH	Quick Service F&B	3,000

A

Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (sf)
Popeye's Supplements	Strip Centre 100th St (west side)	NORTH	Grocery, Convenience & Specialty Foods	1,500
Pop-Up Project	Prairie Mall	NORTH	N/A	4,848
Prairie Kebab	Trader Ridge 100th Street	NORTH	Quick Service F&B	1,175
Prairie Mall Dental	Prairie Mall	NORTH	Professional/Medical/Financial Service	2,295
Prairie Sushi	Northridge Business Park	NORTH	Full Service Restaurants & Pubs	4,000
Prestige Appliances	Royal Oaks - Freestanding	NORTH	Furniture & Decor	15,000
Purdy's Chocolates	Prairie Mall	NORTH	Grocery, Convenience & Specialty Foods	882
QE Home	Prairie Mall	NORTH	Furniture & Decor	1,951
Quality Property Management	Strip Centre (east side of 99th south of 116th)	NORTH	Professional/Medical/Financial Service	1,000
Quality Vacuum	Central Square 100th St (west side)	NORTH	Home Improvement & Gardening	2,000
Quarks	Prairie Mall	NORTH	Fashion, Apparel & Footwear	1,907
Radical Streetwear	Miscellaneous 100th St (west side)	NORTH	Fashion, Apparel & Footwear	2,000
Real Canadian Superstore	Freestanding	NORTH	Auto Parts & Accessories	0
Real Canadian Superstore	Freestanding	NORTH	Books, Media & Computers	3,000
Real Canadian Superstore	Freestanding	NORTH	Fashion, Apparel & Footwear	26,000
Real Canadian Superstore	Freestanding	NORTH	Electronics & Appliances	5,000
Real Canadian Superstore	Freestanding	NORTH	Fashion, Apparel & Footwear	2,000
Real Canadian Superstore	Freestanding	NORTH	Furniture & Decor	10,000
Real Canadian Superstore	Freestanding	NORTH	General Merchandise	137,000
Real Canadian Superstore	Freestanding	NORTH	Grocery, Convenience & Specialty Foods	50,000
Real Canadian Superstore	Freestanding	NORTH	Health & Beauty	3,000
Real Canadian Superstore	Freestanding	NORTH	Home Improvement & Gardening	8,000
Real Canadian Superstore	Freestanding	NORTH	Jewelry & Accessories	5,000
Real Canadian Superstore	Freestanding	NORTH	Personal Services	3,000
Real Canadian Superstore	Freestanding	NORTH	Pharmacy	5,000
Real Canadian Superstore	Freestanding	NORTH	Quick Service F&B	1,000
Real Canadian Superstore	Freestanding	NORTH	Specialty Retail	3,000
Real Canadian Superstore	Freestanding	NORTH	Sporting Goods	3,000
Real Canadian Superstore	Freestanding	NORTH	Toys & Hobbies	3,000
Real Canadian Superstore Liquor	Freestanding	NORTH	Alcohol, Tobacco & Cannabis	7,000
Redline Powercraft	100th Street	NORTH	Auto/RV/Motorsports Dealership	10,000
Reliant Travel	Royal Oak (NEW)	NORTH	Personal Services	1,000
Revolution Mazda	100th Street	NORTH	Auto/RV/Motorsports Dealership	13,400
Ricki's	Prairie Mall	NORTH	Fashion, Apparel & Footwear	4,463
Ricky's Grill	Prairie Ridge	NORTH	Full Service Restaurants & Pubs	5,000
Rob's Repairs	Prairie Plaza	NORTH	Electronics & Appliances	1,000
Rogers Wireless	Prairie Mall	NORTH	Electronics & Appliances	689
Royal Beauty Supplies	Bell Tower Plaza	NORTH	Health & Beauty	1,200
Royal Spirits	Royal Oak Strip Centre	NORTH	Alcohol, Tobacco & Cannabis	1,500
Safeway & Safeway Liquor Store	Safeway Plaza	NORTH	Grocery, Convenience & Specialty Foods	56,000
Saje	Prairie Mall	NORTH	Health & Beauty	1,332
Sculptures Design Nail Studio	Strip Centre (east side of 99th south of 116th)	NORTH	Personal Services	750
Sean Sargent Toyota	Bypass	NORTH	Auto/RV/Motorsports Dealership	20,700
Second Specs	Prairie Mall	NORTH	Jewelry & Accessories	200
Sephora	Prairie Mall	NORTH	Health & Beauty	3,923
Servus Credit Union	Northridge Business Park	NORTH	Professional/Medical/Financial Service	4,000
Sheffield & Son	Prairie Mall	NORTH	Grocery, Convenience & Specialty Foods	319
Sherwin Williams	Royal Oaks	NORTH	Home Improvement & Gardening	3,000
Shoe Warehouse	Prairie Mall	NORTH	Fashion, Apparel & Footwear	3,032
Shoppers Drug Mart	Prairie Mall	NORTH	Pharmacy	14,844

Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (sf)
Showcase	Prairie Mall	NORTH	Specialty Retail	1,518
Sizzling Wok	Prairie Mall	NORTH	Quick Service F&B	394
Skyline Micro Systems	Bell Tower Plaza	NORTH	Electronics & Appliances	2,000
Smokers Corner	KFC Plaza 100th St (east side)	NORTH	Alcohol, Tobacco & Cannabis	1,000
Soft Moc	Prairie Mall	NORTH	Fashion, Apparel & Footwear	2,564
Solo Liquor	Centre 100 Plaza	NORTH	Alcohol, Tobacco & Cannabis	6,000
Spencer's Gifts	Prairie Mall	NORTH	Specialty Retail	1,496
Splatter Paintball	Strip Centre 100th St (west side)	NORTH	Arts & Entertainment	1,000
Starbucks	Trader Ridge 100th Street	NORTH	Quick Service F&B	2,000
Stitch n Dance	Strip Centre (east side of 99th south of 116th)	NORTH	Specialty Retail	1,000
Strange Ideas Comics & Collectibles	Prairie Plaza	NORTH	Specialty Retail	1,500
Subway	Northridge Business Park	NORTH	Quick Service F&B	1,500
Subway	Prairie Mall	NORTH	Quick Service F&B	387
Sun Capsule Health & Fitness	Central Square 100th St (west side)	NORTH	Fitness & Leisure	5,000
Sunrise Records	Prairie Mall	NORTH	Books, Media & Computers	2,443
T&T Nails	Prairie Mall	NORTH	Personal Services	806
Taco Time	Northridge Business Park	NORTH	Quick Service F&B	1,500
Taco Time	Prairie Mall	NORTH	Quick Service F&B	394
Telus	Prairie Mall	NORTH	Electronics & Appliances	1,059
Tenant Storage	Prairie Mall	NORTH	N/A	350
Thai Express	Trader Ridge 100th Street	NORTH	Quick Service F&B	1,175
The Body Shop	Prairie Mall	NORTH	Health & Beauty	635
The Source	Prairie Mall	NORTH	Electronics & Appliances	2,136
Tim Hortons	Northridge Business Park	NORTH	Quick Service F&B	3,000
Tim Hortons	Prairie Mall	NORTH	Quick Service F&B	388
Tim Horton's	Prairie Ridge	NORTH	Quick Service F&B	2,500
Tirecraft Auto	Freestanding	NORTH	Auto Parts & Accessories	5,500
Tommy Gun's	Prairie Mall	NORTH	Personal Services	1,464
Torrid	Prairie Mall	NORTH	Fashion, Apparel & Footwear	2,722
Toyz Emporium	Centre 100 Plaza	NORTH	Toys & Hobbies	1,500
Tracey's Treasures	Freestanding	NORTH	Specialty Retail	2,000
Trapped Escape Room (was Cooperators)	KFC Plaza 100th St (east side)	NORTH	Arts & Entertainment	2,000
UPS Store	Bell Tower Plaza	NORTH	Specialty Retail	1,200
Urban Lengths Salon	Bell Tower Plaza	NORTH	Health & Beauty	1,500
Urban Planet	Prairie Mall	NORTH	Fashion, Apparel & Footwear	21,646
Urban Trail	Prairie Mall	NORTH	Fashion, Apparel & Footwear	1,398
VACANT	Freestanding	NORTH	**VACANT**	4,079
VACANT	Prairie Ridge	NORTH	**VACANT**	3,924
VACANT	Aurora Building	NORTH	**VACANT**	3,175
VACANT	Bell Tower Plaza	NORTH	**VACANT**	2,500
VACANT	Royal Oak	NORTH	**VACANT**	2,400
VACANT	Prairie Ridge	NORTH	**VACANT**	2,348
VACANT	Aurora Building	NORTH	**VACANT**	2,264
VACANT	Prairie Mall	NORTH	**VACANT**	2,159
VACANT	Prairie Mall	NORTH	**VACANT**	2,159
VACANT	Mountainview 95th St & 108th Ave	NORTH	**VACANT**	2,028
VACANT	Safeway Northgate Plaza	NORTH	**VACANT**	1,659
VACANT	Prairie Mall	NORTH	**VACANT**	1,582
VACANT	Prairie Mall	NORTH	**VACANT**	1,500
VACANT	Prairie Ridge	NORTH	**VACANT**	1,336

A

Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (sf)
VACANT	Prairie Mall	NORTH	**VACANT**	1,183
VACANT	Prairie Mall	NORTH	**VACANT**	1,183
VACANT	Prairie Ridge	NORTH	**VACANT**	1,020
VACANT	Prairie Ridge	NORTH	**VACANT**	1,020
VACANT	Strip Centre (west side of 99th south of 116th)	NORTH	**VACANT**	3,500
VACANT	Strip Centre (west side of 99th south of 116th)	NORTH	**VACANT**	3,500
VACANT	Aurora Building	NORTH	**VACANT**	2,742
VACANT	Shops at Trader Ridge - 100th Street	NORTH	**VACANT**	2,200
VACANT	Shops at Trader Ridge - 100th Street	NORTH	**VACANT**	1,230
VACANT	Shops at Trader Ridge - 100th Street	NORTH	**VACANT**	1,175
VACANT	Shops at Trader Ridge - 100th Street	NORTH	**VACANT**	1,175
VACANT	Shops at Trader Ridge - 100th Street	NORTH	**VACANT**	1,175
VACANT	Shops at Trader Ridge - 100th Street	NORTH	**VACANT**	1,143
VACANT	Shops at Trader Ridge - 100th Street	NORTH	**VACANT**	1,036
VACANT	Shops at Trader Ridge - 100th Street	NORTH	**VACANT**	1,020
VACANT	Strip Centre (east side of 99th south of 116th)	NORTH	**VACANT**	1,000
VACANT	Shops at Trader Ridge - 100th Street	NORTH	**VACANT**	891
VACANT (former Canadian Tire)	Canadian Tire Plaza (east side of 99th St)	NORTH	**VACANT**	100,000
VACANT (FUTURE)	Trader Ridge 100th Street	NORTH	**FUTURE**	17,391
VACANT (FUTURE)	Northridge Retail Centre	NORTH	**FUTURE**	14,400
VACANT (was Beth's Books)	Prairie Ridge	NORTH	**VACANT**	2,000
VACANT (was Footlocker)	Prairie Mall	NORTH	**VACANT**	2,411
VACANT (Was Fusion)	Prairie Mall	NORTH	**VACANT**	1,740
VACANT (was Go! Toys & Games)	Prairie Mall	NORTH	**VACANT**	3,366
VACANT (was Nor-lan Chrysler Dodge Jeep RAM)	100th Street	NORTH	**VACANT**	16,500
VACANT (was Nor-lan Used Centre)	100th Street	NORTH	**VACANT**	12,000
VACANT (was Sears)	Prairie Ridge	NORTH	**VACANT**	94,000
VACANT 508	Prairie Plaza	NORTH	**VACANT**	1,440
VACANT 603/604	Prairie Plaza	NORTH	**VACANT**	2,784
VACANT Kiosk	Prairie Mall	NORTH	**VACANT**	200
VACANT Kiosk	Prairie Mall	NORTH	**VACANT**	200
VACANT Kiosk	Prairie Mall	NORTH	**VACANT**	200
VACANT Kiosk	Prairie Mall	NORTH	**VACANT**	150
Vacuum Shop	Strip Centre (east side of 99th south of 116th)	NORTH	Specialty Retail	1,500
Value Village	Canadian Tire Plaza (east side of 99th St)	NORTH	Fashion, Apparel & Footwear	18,750
Virgin Mobile	Prairie Mall	NORTH	Electronics & Appliances	200
Visique	Prairie Mall	NORTH	Personal Services	1,642
WA Sushi	Royal Oak Strip Centre	NORTH	Quick Service F&B	1,000
Walk Run & More (was Curio)	Prairie Plaza	NORTH	Fashion, Apparel & Footwear	2,000
Warehouse One Jeans	Prairie Plaza	NORTH	Fashion, Apparel & Footwear	3,000
Warehouse One Jeans	Prairie Mall	NORTH	Fashion, Apparel & Footwear	3,243
Watsons Photo Source	Prairie Plaza North	NORTH	Electronics & Appliances	1,500
Wendy's	Freestanding	NORTH	Quick Service F&B	3,000
Western RV Country	100th Street	NORTH	Auto/RV/Motorsports Dealership	7,500
Windsor Ford NEW	Trader Ridge 100th Street	NORTH	Auto/RV/Motorsports Dealership	95,000
Windsor Motorsports	100th Street	NORTH	Auto/RV/Motorsports Dealership	6,700
Winstons Health & Fitness (beside Beachcomber)	Freestanding	NORTH	Fitness & Leisure	3,000
Wireless Wave	Prairie Mall	NORTH	Electronics & Appliances	180
Woody's RV World	100th Street	NORTH	Auto/RV/Motorsports Dealership	23,500

Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (sf)
9Round Fitness (was Vacant)	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Fitness & Leisure	1,500
Anytime Fitness	South 40 84th & Hwy 40 / 108th St	SOUTH	Fitness & Leisure	5,000
Bear Creek Liquor Centre	Mission Heights 68th Ave & Mission Heights	SOUTH	Alcohol, Tobacco & Cannabis	1,500
Beer Bros and Spirits	84 Ave	SOUTH	Alcohol, Tobacco & Cannabis	1,500
Bell	South 40 84th & Hwy 40 / 108th St	SOUTH	Specialty Retail	750
Booster Juice	Mission Heights 68th Ave & Mission Heights	SOUTH	Quick Service F&B	800
Butter Chicken Co	Mission Heights 68th Ave & Mission Heights	SOUTH	Quick Service F&B	1,000
Cannabis Haze	Southview Shopping Centre	SOUTH	Alcohol, Tobacco & Cannabis	1,500
Carls Jr	South 40 84th & Hwy 40 / 108th St	SOUTH	Quick Service F&B	3,500
Cheeky Chic Boutique	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Fashion, Apparel & Footwear	1,000
Chopped Leaf Salads	South 40 84th & Hwy 40 / 108th St	SOUTH	Quick Service F&B	1,250
Circle K Convenience	68th Ave & O'Brien/Pine	SOUTH	Grocery, Convenience & Specialty Foods	3,000
Circle K Convenience	Mission Heights Crossing	SOUTH	Grocery, Convenience & Specialty Foods	1,500
Circle K Convenience	Patterson Mall 84th Ave & Patterson Dr	SOUTH	Grocery, Convenience & Specialty Foods	2,000
Circle K Convenience	Railtown 84th & Resources Rd	SOUTH	Grocery, Convenience & Specialty Foods	2,000
CoCo	South 40 84th & Hwy 40 / 108th St	SOUTH	Specialty Retail	1,000
COOP Convenience	Grande Banks Freestanding	SOUTH	Grocery, Convenience & Specialty Foods	2,000
COOP Liquor	Grande Banks Freestanding	SOUTH	Alcohol, Tobacco & Cannabis	3,000
Cora's	South 40 84th & Hwy 40 / 108th St	SOUTH	Full Service Restaurants & Pubs	2,000
Country Club Animal Clinic	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Professional/Medical/Financial Service	2,000
Crown & Anchor Pub	Southview Shopping Centre	SOUTH	Full Service Restaurants & Pubs	8,000
Daddio's Pizzeria	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Quick Service F&B	1,000
Dairy Queen	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Quick Service F&B	2,000
Dollarama	South 40 84th & Hwy 40 / 108th St	SOUTH	Specialty Retail	6,000
Domino's Pizza	Grande Banks on 68th	SOUTH	Quick Service F&B	1,978
Dragon Chef Restaurant	South 40 84th & Hwy 40 / 108th St	SOUTH	Quick Service F&B	1,200
EDO	South 40 84th & Hwy 40 / 108th St	SOUTH	Quick Service F&B	1,000
Edward Jones	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Professional/Medical/Financial Service	1,000
Europa Meat Shop	South 40 84th & Hwy 40 / 108th St	SOUTH	Grocery, Convenience & Specialty Foods	1,000
Eye Doctors Grande Banks	Grande Banks on 68th	SOUTH	Professional/Medical/Financial Service	2,000
Fas Gas Short Stop	84th & 116th	SOUTH	Grocery, Convenience & Specialty Foods	1,500
First Choice Haircutters	South 40 84th & Hwy 40 / 108th St	SOUTH	Personal Services	1,200
Fresh 2 Go	Eastlink Centre	SOUTH	Quick Service F&B	300
GP Alterations (was Fabutan)	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Personal Services	1,000
Grains Bakery Cafe	Grande Banks Stone Ridge	SOUTH	Quick Service F&B	2,500
Harvey's	Grande Banks Stone Ridge	SOUTH	Quick Service F&B	3,500
Haze Cannabis South	100 Street	SOUTH	Alcohol, Tobacco & Cannabis	1,250
Head Room Salon	Mission Heights 68th Ave & Mission Heights	SOUTH	Health & Beauty	1,000
IDA Pharmacy	Grande Banks on 68th	SOUTH	Pharmacy	4,391
Isee Optical	South 40 84th & Hwy 40 / 108th St	SOUTH	Personal Services	750
Joey's Urban Taqueria	Mission Heights 68th Ave & Mission Heights	SOUTH	Full Service Restaurants & Pubs	1,000
Jugo Juice	Eastlink Centre	SOUTH	Quick Service F&B	300
L'il Sprouts Pre-School	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Personal Services	750
Liquor Barn	Resource Plaza 76th Ave & Resource Rd	SOUTH	Alcohol, Tobacco & Cannabis	4,000
Liquor Depot	Patterson Mall 84th Ave & Patterson Dr	SOUTH	Alcohol, Tobacco & Cannabis	5,500
Liquor Depot	Southview 84th Ave & 100th St	SOUTH	Alcohol, Tobacco & Cannabis	2,973
Liquor House	Westpoint @ 84th	SOUTH	Alcohol, Tobacco & Cannabis	2,000
Liquor Locker	Freestanding Hwy 40 / 108th St (west side)	SOUTH	Alcohol, Tobacco & Cannabis	1,500
Liquor Plus	84th & 116th	SOUTH	Alcohol, Tobacco & Cannabis	2,000
Little Caesars	Grande Banks Stone Ridge	SOUTH	Quick Service F&B	1,000
Lucky Leaf Cannabis	84 Ave	SOUTH	Alcohol, Tobacco & Cannabis	1,000

A

Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (sf)
Mac's Convenience	Resource Plaza 76th Ave & Resource Rd	SOUTH	Grocery, Convenience & Specialty Foods	3,000
McDonalds	South 40 84th & Hwy 40 / 108th St	SOUTH	Quick Service F&B	5,000
Menchies	Mission Heights 68th Ave & Mission Heights	SOUTH	Quick Service F&B	1,000
Miss Modern Boutique Day Spa	South 40 84th & Hwy 40 / 108th St	SOUTH	Personal Services	1,000
Natures Craft Cannabis	Grande Banks 67 Ave	SOUTH	Alcohol, Tobacco & Cannabis	1,000
Natures Craft Cannabis	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Alcohol, Tobacco & Cannabis	1,000
No Frills	South 40 84th & Hwy 40 / 108th St	SOUTH	Grocery, Convenience & Specialty Foods	30,000
Off the Record Cannabis	Southview 84th Ave & 100th St	SOUTH	Alcohol, Tobacco & Cannabis	1,694
Oranj Fitness	Grande Banks on 68th	SOUTH	Fitness & Leisure	6,500
Original Joes	South 40 84th & Hwy 40 / 108th St	SOUTH	Full Service Restaurants & Pubs	3,000
Papa John's	South 40 84th & Hwy 40 / 108th St	SOUTH	Quick Service F&B	1,000
Papa John's	Southview 84th Ave & 100th St	SOUTH	Quick Service F&B	1,500
Pet Valu	South 40 84th & Hwy 40 / 108th St	SOUTH	Specialty Retail	2,500
Pizza Hut/Wing Street	Patterson Mall 84th Ave & Patterson Dr	SOUTH	Quick Service F&B	2,500
Pizza73	Mission Heights 68th Ave & Mission Heights	SOUTH	Quick Service F&B	1,000
Quesada Burritos & Tacos	South 40 84th & Hwy 40 / 108th St	SOUTH	Quick Service F&B	1,458
Ramona's Pizza & Social Lounge	Railtown 84th & Resources Rd	SOUTH	Full Service Restaurants & Pubs	4,000
RBC	South 40 84th & Hwy 40 / 108th St	SOUTH	Professional/Medical/Financial Service	5,000
Real Canadian Liquorstore	South 40 84th & Hwy 40 / 108th St	SOUTH	Alcohol, Tobacco & Cannabis	4,000
Red Rock Urban BBQ	Grande Banks Stone Ridge	SOUTH	Full Service Restaurants & Pubs	2,000
Royal Spirits	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Alcohol, Tobacco & Cannabis	2,500
Safeway	Southview 84th Ave & 100th St	SOUTH	Grocery, Convenience & Specialty Foods	65,700
Second Cup	Eastlink Centre	SOUTH	Quick Service F&B	300
Servus Credit Union	South 40 84th & Hwy 40 / 108th St	SOUTH	Professional/Medical/Financial Service	3,500
Shell Select	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Grocery, Convenience & Specialty Foods	750
Shell Select	Freestanding Hwy 40 / 108th St (west side)	SOUTH	Grocery, Convenience & Specialty Foods	2,500
Shoppers Drug Mart	South 40 84th & Hwy 40 / 108th St	SOUTH	Pharmacy	17,000
Shoppers Home Health Care	Patterson Mall 84th Ave & Patterson Dr	SOUTH	Pharmacy	8,000
Short Stop Fas Gas	Westpoint @ 84th	SOUTH	Grocery, Convenience & Specialty Foods	1,000
Snap Fitness	Mission Heights 68th Ave & Mission Heights	SOUTH	Fitness & Leisure	3,000
South 40 Dental	South 40 84th & Hwy 40 / 108th St	SOUTH	Professional/Medical/Financial Service	3,000
Southside Pharmacy	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Pharmacy	1,250
Spirit Leaf	South 40 84th & Hwy 40 / 108th St	SOUTH	Alcohol, Tobacco & Cannabis	1,200
St. Louis Grill (was Famoso Pizza)	South 40 84th & Hwy 40 / 108th St	SOUTH	Quick Service F&B	1,500
Starbucks	Mission Heights 68th Ave & Mission Heights	SOUTH	Quick Service F&B	1,500
Starbucks	Railtown 84th & Resources Rd	SOUTH	Quick Service F&B	1,500
State & Main Kitchen	Southview 84th Ave & 100th St	SOUTH	Full Service Restaurants & Pubs	5,400
Strands Styling	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Personal Services	1,000
Style 6 Hair Salon (was Light Works Aesthetics)	Patterson Mall 84th Ave & Patterson Dr	SOUTH	Personal Services	1,000
Subway	Grande Banks on 68th	SOUTH	Quick Service F&B	2,000
Subway	Railtown 84th & Resources Rd	SOUTH	Quick Service F&B	2,000
Subway	South 40 84th & Hwy 40 / 108th St	SOUTH	Quick Service F&B	1,500
Supplement King	Mission Heights 68th Ave & Mission Heights	SOUTH	Grocery, Convenience & Specialty Foods	800
T&T Nails	South 40 84th & Hwy 40 / 108th St	SOUTH	Personal Services	1,200
Tayo Vietnamese (was Vacant)	Mission Heights 68th Ave & Mission Heights	SOUTH	Full Service Restaurants & Pubs	1,000
The Headroom Salon	Mission Heights 68th Ave & Mission Heights	SOUTH	Personal Services	1,000
Tim Hortons	Country Club Plaza Poplar Dr & 68th Ave	SOUTH	Quick Service F&B	2,250
Tim Hortons	South 40 84th & Hwy 40 / 108th St	SOUTH	Quick Service F&B	3,500
Tip Top Barbershop	South 40 84th & Hwy 40 / 108th St	SOUTH	Personal Services	750
Tito's Fresh Healthy Food	Eastlink Centre	SOUTH	Quick Service F&B	300
Today's Dental	Southview 84th Ave & 100th St	SOUTH	Professional/Medical/Financial Service	2,800

Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (sf)
VACANT	Southview Shopping Centre	**SOUTH**	**VACANT**	3,340
VACANT	Southview Shopping Centre	**SOUTH**	**VACANT**	3,000
VACANT	Grande Banks on 68th	**SOUTH**	**VACANT**	2,368
VACANT	Mission Heights Crossing	**SOUTH**	**VACANT**	1,500
VACANT	Grande Banks on 68th	**SOUTH**	**VACANT**	1,500
VACANT	South 40 84th & Hwy 40 / 108th St	**SOUTH**	**VACANT**	1,200
VACANT	South 40 84th & Hwy 40 / 108th St	**SOUTH**	**VACANT**	1,000
VACANT	Patterson Mall 84th Ave & Patterson Dr	**SOUTH**	**VACANT**	3,600
VACANT (Forum Properties) CRU	70th Ave to 76th Ave & Resources Rd	**SOUTH**	**FUTURE**	9,000
VACANT (Forum Properties) CRU	73rd Ave to 76th Ave & Resources Rd	**SOUTH**	**FUTURE**	8,500
VACANT (Forum Properties) CRU	75th Ave to 76th Ave & Resources Rd	**SOUTH**	**FUTURE**	8,500
VACANT (Forum Properties) CRU	76th Ave to 76th Ave & Resources Rd	**SOUTH**	**FUTURE**	7,950
VACANT (Forum Properties) Gas	74th Ave to 76th Ave & Resources Rd	**SOUTH**	**FUTURE**	2,970
VACANT (Forum Properties) Mid Box	68th Ave to 76th Ave & Resources Rd	**SOUTH**	**FUTURE**	35,000
VACANT (Forum Properties) Mid Box	69th Ave to 76th Ave & Resources Rd	**SOUTH**	**FUTURE**	17,500
VACANT (Forum Properties) Pad	71st Ave to 76th Ave & Resources Rd	**SOUTH**	**FUTURE**	5,250
VACANT (Forum Properties) Pad	72nd Ave to 76th Ave & Resources Rd	**SOUTH**	**FUTURE**	5,250
VACANT (FUTURE)	Deeproot Commercial	**SOUTH**	**FUTURE**	10,000
VACANT (FUTURE) CRU 1	Railtown 84th & Resources Rd	**SOUTH**	**FUTURE**	1,000
VACANT (FUTURE) CRU 2	Railtown 84th & Resources Rd	**SOUTH**	**FUTURE**	2,275
VACANT (FUTURE) CRU 3	Railtown 84th & Resources Rd	**SOUTH**	**FUTURE**	1,400
VACANT (FUTURE) CRU 4	Railtown 84th & Resources Rd	**SOUTH**	**FUTURE**	1,400
VACANT (FUTURE) CRU 5	Railtown 84th & Resources Rd	**SOUTH**	**FUTURE**	3,400
VACANT (was ATB Financial)	Mission Heights 68th Ave & Mission Heights	**SOUTH**	**VACANT**	5,000
VACANT (was Fresons)	Southview Shopping Centre	**SOUTH**	**VACANT**	35,700
Valu Buds Railtown	Railtown 84th & Resources Rd	**SOUTH**	Alcohol, Tobacco & Cannabis	3,250
Vintage Wine & Spirits	100th & 88th St	**SOUTH**	Alcohol, Tobacco & Cannabis	4,000
Westman's Barbershop & Espresso	Grande Banks Stone Ridge	**SOUTH**	Personal Services	1,000
Wing 'n it	Grande Banks on 68th	**SOUTH**	Quick Service F&B	2,400

Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (sf)
A&W	Brochu Industrial	WEST	Quick Service F&B	3,000
A&W	Freestanding	WEST	Quick Service F&B	3,000
Ace Liquor	Save On Foods Plaza	WEST	Alcohol, Tobacco & Cannabis	2,500
Alpine Water	Centre West Plaza	WEST	Grocery, Convenience & Specialty Foods	2,100
ATB Financial	Westside Plaza	WEST	Professional/Medical/Financial Service	10,300
Bed Bath & Beyond	Westgate Centre	WEST	Furniture & Decor	17,000
Best Buy	Grande Prairie Power Centre	WEST	Electronics & Appliances	25,800
BMO	Westside Plaza	WEST	Professional/Medical/Financial Service	8,300
Bone n Biscuit	Westgate Centre	WEST	Specialty Retail	1,000
Booster Juice	Save On Foods Plaza	WEST	Quick Service F&B	750
Booster Juice	Westgate Centre - Monaco Square	WEST	Quick Service F&B	1,150
Boston Pizza	Westgate Power Centre	WEST	Full Service Restaurants & Pubs	7,659
Bowling Stones 10 Pin Bowling	Freestanding	WEST	Arts & Entertainment	10,000
Brick	Westgate Power Centre	WEST	Furniture & Decor	25,000
Broken Oak Distillery	100th Ave	WEST	Alcohol, Tobacco & Cannabis	5,000
Brown's Social House	Westgate Centre	WEST	Full Service Restaurants & Pubs	3,000
Bulk Barn	Westgate Centre	WEST	Grocery, Convenience & Specialty Foods	5,000
Burger King	Melcor Crossing Grande Prairie	WEST	Quick Service F&B	3,618
Burrito Zone/Pizza Depot	Gateway Power Centre	WEST	Quick Service F&B	1,000
Busters Pizza & Donair	Westgate Centre - Monaco Square	WEST	Quick Service F&B	1,500
Cana Cabana	Gateway Power Centre	WEST	Alcohol, Tobacco & Cannabis	1,257
Canada Post	Gateway Power Centre	WEST	Professional/Medical/Financial Service	2,000
Canadian Brewhouse	Melcor Crossing Grande Prairie	WEST	Full Service Restaurants & Pubs	8,114
Canadian Green Cannabis	100th Ave	WEST	Alcohol, Tobacco & Cannabis	1,000
Canadian Tire **(NEW)**	Westgate Centre	WEST	Auto Parts & Accessories	51,900
Canadian Tire **(NEW)**	Westgate Centre	WEST	Books, Media & Computers	0
Canadian Tire **(NEW)**	Westgate Centre	WEST	Fashion, Apparel & Footwear	1,730
Canadian Tire **(NEW)**	Westgate Centre	WEST	Electronics & Appliances	12,110
Canadian Tire **(NEW)**	Westgate Centre	WEST	Fashion, Apparel & Footwear	865
Canadian Tire **(NEW)**	Westgate Centre	WEST	Furniture & Decor	43,250
Canadian Tire (NEW)	Westgate Centre	WEST	General Merchandise	173,000
Canadian Tire **(NEW)**	Westgate Centre	WEST	Grocery, Convenience & Specialty Foods	0
Canadian Tire **(NEW)**	Westgate Centre	WEST	Health & Beauty	5,190
Canadian Tire **(NEW)**	Westgate Centre	WEST	Home Improvement & Gardening	0
Canadian Tire **(NEW)**	Westgate Centre	WEST	Jewelry & Accessories	0
Canadian Tire **(NEW)**	Westgate Centre	WEST	Personal Services	0
Canadian Tire **(NEW)**	Westgate Centre	WEST	Pharmacy	865
Canadian Tire **(NEW)**	Westgate Centre	WEST	Quick Service F&B	0
Canadian Tire **(NEW)**	Westgate Centre	WEST	Specialty Retail	8,650
Canadian Tire **(NEW)**	Westgate Centre	WEST	Sporting Goods	31,140
Canadian Tire **(NEW)**	Westgate Centre	WEST	Toys & Hobbies	17,300
Canadian Western Bank	Westgate Power Centre	WEST	Professional/Medical/Financial Service	8,000
Carters Osh Kosk	Westgate Centre	WEST	Fashion, Apparel & Footwear	1,750
Chatters	Westgate Centre	WEST	Personal Services	750
China Rose	Westside Plaza	WEST	Quick Service F&B	1,500
Chopped Leaf Salads	Melcor Crossing Grande Prairie	WEST	Quick Service F&B	1,292
CIBC	Grande Prairie Power Centre	WEST	Professional/Medical/Financial Service	7,300
Cineplex Odeon	Melcor Crossing Grande Prairie	WEST	Arts & Entertainment	75,000
COBS Bread Bakery	Westgate Centre	WEST	Grocery, Convenience & Specialty Foods	1,500

Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (sf)
COSTCO	Centre West Business Park	WEST	Auto Parts & Accessories	15,000
COSTCO	Centre West Business Park	WEST	Books, Media & Computers	625
COSTCO	Centre West Business Park	WEST	Fashion, Apparel & Footwear	3,750
COSTCO	Centre West Business Park	WEST	Electronics & Appliances	7,500
COSTCO	Centre West Business Park	WEST	Fashion, Apparel & Footwear	0
COSTCO	Centre West Business Park	WEST	Furniture & Decor	2,500
COSTCO	Centre West Business Park	WEST	General Merchandise	125,000
COSTCO	Centre West Business Park	WEST	Grocery, Convenience & Specialty Foods	83,750
COSTCO	Centre West Business Park	WEST	Health & Beauty	1,250
COSTCO	Centre West Business Park	WEST	Home Improvement & Gardening	2,500
COSTCO	Centre West Business Park	WEST	Jewelry & Accessories	313
COSTCO	Centre West Business Park	WEST	Personal Services	1,563
COSTCO	Centre West Business Park	WEST	Pharmacy	1,563
COSTCO	Centre West Business Park	WEST	Quick Service F&B	938
COSTCO	Centre West Business Park	WEST	Specialty Retail	1,250
COSTCO	Centre West Business Park	WEST	Sporting Goods	1,250
COSTCO	Centre West Business Park	WEST	Toys & Hobbies	1,250
Countryside Motorsports	Vision West Business Park	WEST	Auto/RV/Motorsports Dealership	25,000
Dental West GP	Westgate Centre - Monaco Square	WEST	Professional/Medical/Financial Service	3,000
Dollar Tree	Westgate Centre	WEST	Specialty Retail	8,000
Dollarama	Melcor Crossing Grande Prairie	WEST	Specialty Retail	12,539
Domino's Pizza	College Park 100th Ave & 106th St	WEST	Quick Service F&B	2,500
Dr. Phone Fix	Westgate Centre	WEST	Electronics & Appliances	1,750
Dulux Paint	Vision West Business Park	WEST	Home Improvement & Gardening	1,500
Easy Financial	Melcor Crossing Grande Prairie	WEST	Professional/Medical/Financial Service	1,225
EDO Japanese	Grande Prairie Power Centre	WEST	Quick Service F&B	750
Fabricland	Save On Foods Plaza	WEST	Specialty Retail	10,000
Farm Credit	Centre West Plaza	WEST	Professional/Medical/Financial Service	7,000
Fatburger	Save On Foods Plaza	WEST	Quick Service F&B	2,500
Five Guys Burgers & Fries	Westgate Power Centre	WEST	Quick Service F&B	2,000
Freshii	Grande Prairie Power Centre	WEST	Quick Service F&B	1,000
Friendship Donuts	Westside Plaza	WEST	Quick Service F&B	1,500
Fusion Cup	Grande Prairie Power Centre	WEST	Quick Service F&B	1,000
GNC	Grande Prairie Power Centre	WEST	Grocery, Convenience & Specialty Foods	1,000
Goodwill Centre	Melcor Crossing Grande Prairie	WEST	Specialty Retail	1,000
Grande Granite	Vision West Business Park	WEST	Home Improvement & Gardening	1,500
Grande Prairie Chrysler Dodge Jeep RAM	Westgate Power Centre	WEST	Auto/RV/Motorsports Dealership	28,000
Grande Prairie Convenience (Petro Canada)	Brochu Industrial	WEST	Grocery, Convenience & Specialty Foods	2,500
Grande Prairie Hyundai	Westgate Power Centre	WEST	Auto/RV/Motorsports Dealership	7,000
Grande Prairie KIA	Vision West Business Park	WEST	Auto/RV/Motorsports Dealership	10,000
Grande Prairie Mitsubishi	Westgate Power Centre	WEST	Auto/RV/Motorsports Dealership	12,500
Grande Prairie Subaru	Westgate Power Centre	WEST	Auto/RV/Motorsports Dealership	12,500
Great Clips	Gateway Power Centre	WEST	Personal Services	1,000
Great Northern Casino	Freestanding	WEST	Arts & Entertainment	20,000
Harvey's	Westgate Centre	WEST	Quick Service F&B	2,000
Home Depot	Westgate Power Centre	WEST	Home Improvement & Gardening	100,000
Home Hardware	Freestanding	WEST	Home Improvement & Gardening	25,000
Home Sense	Westgate Centre	WEST	Furniture & Decor	20,000
Homesteader Health	Gateway Power Centre	WEST	Grocery, Convenience & Specialty Foods	5,000
Humpty's	Sterling Centre	WEST	Full Service Restaurants & Pubs	2,000
IG Wealth	Westgate Centre - Monaco Square	WEST	Professional/Medical/Financial Service	1,500

Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (sf)
Janina's Jewelers	Westgate Centre - Monaco Square	WEST	Jewelry & Accessories	3,000
Jax Grill	Industrial 97th Ave & 112 St	WEST	Full Service Restaurants & Pubs	4,500
Jeffrey's Cafe	Westside Plaza	WEST	Quick Service F&B	6,000
Jenny Craig	Melcor Crossing Grande Prairie	WEST	Personal Services	2,215
Jimmy's Liquor	100th Ave	WEST	Alcohol, Tobacco & Cannabis	2,000
JYSK	Melcor Crossing Grande Prairie	WEST	Furniture & Decor	15,728
Keg Steakhouse	College Park 100th Ave & 106th St	WEST	Full Service Restaurants & Pubs	5,500
KFC	College Park 100th Ave & 106th St	WEST	Quick Service F&B	2,500
King of Donair	Gateway Power Centre	WEST	Quick Service F&B	1,200
La Vie en Rose	Westgate Centre	WEST	Fashion, Apparel & Footwear	5,300
Liquor Depot	Westgate Centre	WEST	Alcohol, Tobacco & Cannabis	4,000
Liquor Plus	College Park 100th Ave & 106th St	WEST	Alcohol, Tobacco & Cannabis	1,500
London Drugs	Melcor Crossing Grande Prairie	WEST	Auto Parts & Accessories	318
London Drugs	Melcor Crossing Grande Prairie	WEST	Books, Media & Computers	1,590
London Drugs	Melcor Crossing Grande Prairie	WEST	Fashion, Apparel & Footwear	795
London Drugs	Melcor Crossing Grande Prairie	WEST	Electronics & Appliances	6,360
London Drugs	Melcor Crossing Grande Prairie	WEST	Electronics & Appliances	
London Drugs	Melcor Crossing Grande Prairie	WEST	Fashion, Apparel & Footwear	0
London Drugs	Melcor Crossing Grande Prairie	WEST	Furniture & Decor	3,180
London Drugs	Melcor Crossing Grande Prairie	WEST	General Merchandise	31,800
London Drugs	Melcor Crossing Grande Prairie	WEST	Grocery, Convenience & Specialty Foods	3,180
London Drugs	Melcor Crossing Grande Prairie	WEST	Health & Beauty	5,724
London Drugs	Melcor Crossing Grande Prairie	WEST	Home Improvement & Gardening	0
London Drugs	Melcor Crossing Grande Prairie	WEST	Jewelry & Accessories	0
London Drugs	Melcor Crossing Grande Prairie	WEST	Personal Services	0
London Drugs	Melcor Crossing Grande Prairie	WEST	Pharmacy	7,950
London Drugs	Melcor Crossing Grande Prairie	WEST	Quick Service F&B	0
London Drugs	Melcor Crossing Grande Prairie	WEST	Specialty Retail	1,590
London Drugs	Melcor Crossing Grande Prairie	WEST	Sporting Goods	318
London Drugs	Melcor Crossing Grande Prairie	WEST	Toys & Hobbies	795
Love Boutique	Gateway Power Centre	WEST	Fashion, Apparel & Footwear	750
Luv 2 Play Indoor Plaground	Vision West Business Park	WEST	Arts & Entertainment	5,000
M&M Meat Shops	Gateway Power Centre	WEST	Grocery, Convenience & Specialty Foods	750
Mad Hatters Eatery	100th Ave	WEST	Full Service Restaurants & Pubs	4,000
Marks	Grande Prairie Power Centre	WEST	Fashion, Apparel & Footwear	20,508
Mary Brown's Chicken	Gateway Power Centre	WEST	Quick Service F&B	750
Mastermind Toys	Westgate Centre	WEST	Toys & Hobbies	5,307
Maurices	Westgate Centre	WEST	Fashion, Apparel & Footwear	5,500
McDonalds	Freestanding	WEST	Quick Service F&B	3,000
Michaels Crafts	Melcor Crossing Grande Prairie	WEST	Specialty Retail	24,180
Mint Health & Drugs	Sterling Centre	WEST	Pharmacy	2,000
Mohawk Corner Store	Melcor Crossing Grande Prairie	WEST	Grocery, Convenience & Specialty Foods	1,000
Monaco Shoes	Westgate Centre - Monaco Square	WEST	Fashion, Apparel & Footwear	1,500
Money Mart	Gateway Power Centre	WEST	Personal Services	750
Monica's Restaurant (Stafford Inn)	Centre West Business Park	WEST	Full Service Restaurants & Pubs	5,000
Montana's	Melcor Crossing Grande Prairie	WEST	Full Service Restaurants & Pubs	5,000
Moore's Clothing for Men	Westgate Centre - Monaco Square	WEST	Fashion, Apparel & Footwear	2,000
Mucho Burrito	Grande Prairie Power Centre	WEST	Quick Service F&B	1,000
NAPA Auto Parts	Vision West Business Park	WEST	Auto Parts & Accessories	10,000
Old Navy	Westgate Centre	WEST	Fashion, Apparel & Footwear	13,500
Olympia Liquor	Melcor Crossing Grande Prairie	WEST	Alcohol, Tobacco & Cannabis	3,429

Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (sf)
OPA Greek	Grande Prairie Power Centre	WEST	Quick Service F&B	1,000
Orange Theory Fitness	Westgate Centre - Monaco Square	WEST	Fitness & Leisure	2,000
Parkside Convenience Store	College Park 100th Ave & 106th St	WEST	Grocery, Convenience & Specialty Foods	1,500
Party City	Westgate Centre	WEST	Specialty Retail	8,000
Peavey Mart	Vision West Business Park	WEST	Home Improvement & Gardening	16,800
Penningtons	Melcor Crossing Grande Prairie	WEST	Fashion, Apparel & Footwear	8,362
Petland	Melcor Crossing Grande Prairie	WEST	Specialty Retail	11,839
PetSmart	Grande Prairie Power Centre	WEST	Specialty Retail	12,063
Planet Fitness	Gateway Power Centre	WEST	Fitness & Leisure	20,000
Plantlife	Westgate Centre	WEST	Alcohol, Tobacco & Cannabis	1,990
Prairie Gold Jewelry	Gateway Power Centre	WEST	Jewelry & Accessories	2,500
Princess Auto	Vision West Business Park	WEST	Auto Parts & Accessories	15,000
Purple Crumbs Bubble Tea	Save On Foods Plaza	WEST	Quick Service F&B	750
Q Nails	Melcor Crossing Grande Prairie	WEST	Personal Services	1,509
Q Nails	Westgate Centre	WEST	Personal Services	1,250
Quizno's	Save On Foods Plaza	WEST	Quick Service F&B	1,000
Red Wing Shoes	Westgate Centre - Monaco Square	WEST	Fashion, Apparel & Footwear	1,500
Reitmans	Melcor Crossing Grande Prairie	WEST	Fashion, Apparel & Footwear	6,122
RONA	Melcor Crossing Grande Prairie	WEST	Home Improvement & Gardening	40,145
S3 Skate Snow Surf	Grande Prairie Power Centre	WEST	Sporting Goods	7,000
Sally Beauty	Grande Prairie Power Centre	WEST	Health & Beauty	1,000
Save On Foods	Save On Foods Plaza	WEST	Grocery, Convenience & Specialty Foods	40,000
Scotiabank	Grande Prairie Power Centre	WEST	Professional/Medical/Financial Service	8,000
Season of Forty @ Holiday Inn	100th Ave	WEST	Full Service Restaurants & Pubs	2,500
Sheshu's Sizzling Tandoori	Westgate Centre - Monaco Square	WEST	Quick Service F&B	2,000
Shoe Company	Westgate Centre	WEST	Fashion, Apparel & Footwear	5,300
Sizzling Tandoori	Westgate Centre - Monaco Square	WEST	Full Service Restaurants & Pubs	2,280
Sleep Country	Westgate Centre	WEST	Furniture & Decor	5,000
SOJO Sushi	Melcor Crossing Grande Prairie	WEST	Quick Service F&B	2,000
Soleilki Asian Buffet	Westgate Centre - Monaco Square	WEST	Full Service Restaurants & Pubs	2,500
SOLO Liquor	Westgate Power Centre	WEST	Alcohol, Tobacco & Cannabis	4,000
SOS Safety Supplies	Industrial 97th Ave & 112 St	WEST	Specialty Retail	2,000
SOTO Tepanyaki	Gateway Power Centre	WEST	Full Service Restaurants & Pubs	1,756
Sport Clips	Westgate Centre - Monaco Square	WEST	Personal Services	1,500
Staples	Melcor Crossing Grande Prairie	WEST	Specialty Retail	26,118
Starbucks	Melcor Crossing Grande Prairie	WEST	Quick Service F&B	2,009
Sticky's Candy	Gateway Power Centre	WEST	Grocery, Convenience & Specialty Foods	1,000
Subway	Grande Prairie Power Centre	WEST	Quick Service F&B	1,000
Subway	Save On Foods Plaza	WEST	Quick Service F&B	1,000
Supplement King	Westgate Centre	WEST	Grocery, Convenience & Specialty Foods	1,500
Suzannes & Jenny's	Westgate Centre - Monaco Square	WEST	Fashion, Apparel & Footwear	1,500
TD Bank	Westside Plaza	WEST	Professional/Medical/Financial Service	7,700
Telus/Koodo	Save On Foods Plaza	WEST	Electronics & Appliances	1,000
The Butcher Shop (was Esquires Coffee)	Westside Plaza	WEST	Grocery, Convenience & Specialty Foods	2,000
The Old Trapper Restaurant	100th Ave	WEST	Full Service Restaurants & Pubs	4,800
Tim Hortons	College Park 100th Ave & 106th St	WEST	Quick Service F&B	2,800
Tokyo Ichiban	Melcor Crossing Grande Prairie	WEST	Quick Service F&B	3,604
Tommy Gunn's Barber Shop	Grande Prairie Power Centre	WEST	Personal Services	1,000
Urban Barn	Westgate Centre	WEST	Furniture & Decor	5,500

Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (sf)
VACAN (was Den Carvery)	Freestanding	WEST	VACANT	10,200
VACANT	Grande Prairie Power Centre	WEST	VACANT	9,753
VACANT	Grande Prairie Power Centre	WEST	VACANT	6,332
VACANT	Melcor Crossing Grande Prairie	WEST	VACANT	2,215
VACANT	Melcor Crossing Grande Prairie	WEST	VACANT	1,756
VACANT	Grande Prairie Power Centre	WEST	VACANT	1,500
VACANT	Westgate Centre - Monaco Square	WEST	VACANT	1,500
VACANT	Save On Foods Plaza	WEST	VACANT	1,058
VACANT	Westgate Centre - Monaco Square	WEST	VACANT	1,036
VACANT	Westgate Centre - Monaco Square	WEST	VACANT	912
VACANT	Melcor Crossing Grande Prairie	WEST	VACANT	23,566
VACANT #20	Westgate Centre	WEST	VACANT	2,400
VACANT #22 FUTURE	Westgate Centre	WEST	FUTURE	2,500
VACANT #23 FUTURE	Westgate Centre	WEST	FUTURE	1,200
VACANT #24 FUTURE	Westgate Centre	WEST	FUTURE	2,400
VACANT #26 FUTURE	Westgate Centre	WEST	FUTURE	4,000
VACANT #27 FUTURE	Westgate Centre	WEST	FUTURE	1,990
VACANT #33 FUTURE	Westgate Centre	WEST	FUTURE	11,500
VACANT #34-39 FUTURE	Westgate Centre	WEST	FUTURE	7,300
VACANT #40 FUTURE	Westgate Centre	WEST	FUTURE	16,500
VACANT #42 FUTURE	Westgate Centre	WEST	FUTURE	2,475
VACANT #43-48 FUTURE	Westgate Centre	WEST	FUTURE	8,600
VACANT #49 FUTURE	Westgate Centre	WEST	FUTURE	2,350
VACANT #7 (was Pier One)	Westgate Centre	WEST	VACANT	7,450
VACANT #9	Westgate Centre	WEST	VACANT	9,410
VACANT (was Addition Elle)	Melcor Crossing Grande Prairie	WEST	VACANT	4,014
VACANT (was Castaspella Boutique)	Melcor Crossing Grande Prairie	WEST	VACANT	3,636
VACANT (was Firecrust Pizza)	Save On Foods Plaza	WEST	VACANT	1,250
VACANT (was LA Heat Tanning)	Melcor Crossing Grande Prairie	WEST	VACANT	2,360
VACANT (was Nevada Bobs relocated D/T)	Westgate Power Centre	WEST	VACANT	12,000
VACANT (was Whiskey House Liquor Store)	Freestanding	WEST	VACANT	1,500
VACANT BAY 10	Centre West Plaza	WEST	VACANT	2,226
VACANT BAY 11	Centre West Plaza	WEST	VACANT	2,100
VACANT BAY 4	Centre West Plaza	WEST	VACANT	2,140
VACANT BAY 5	Centre West Plaza	WEST	VACANT	2,000
VACANT BAY 6	Centre West Plaza	WEST	VACANT	2,148
VACANT BAY 7	Centre West Plaza	WEST	VACANT	2,250
VACANT BAY 8	Centre West Plaza	WEST	VACANT	2,100
VACANT BAY 9	Centre West Plaza	WEST	VACANT	2,226
VACANT Grande Prairie Ford (Hansen)	Westgate Power Centre	WEST	VACANT	18,300
VACANT Unit 102	Gateway Power Centre	WEST	VACANT	2,514
VACANT Unit 103	Gateway Power Centre	WEST	VACANT	1,341
Valu Buds (was Thyme Maternity)	Melcor Crossing Grande Prairie	WEST	Alcohol, Tobacco & Cannabis	2,829
Visions Electronics	Vision West Business Park	WEST	Electronics & Appliances	15,000
Volkswagen	108th Street	WEST	Auto/RV/Motorsports Dealership	9,800

Retail Business Name	Retail Project/Location	Retail Area (North, South, East, West, Central)	General Retail Category	Est. Area (sf)
WalMart	Walmart Centre Prairie	WEST	Auto Parts & Accessories	15,000
WalMart	Walmart Centre Prairie	WEST	Books, Media & Computers	2,000
WalMart	Walmart Centre Prairie	WEST	Fashion, Apparel & Footwear	50,000
WalMart	Walmart Centre Prairie	WEST	Electronics & Appliances	15,000
WalMart	Walmart Centre Prairie	WEST	Fashion, Apparel & Footwear	3,000
WalMart	Walmart Centre Prairie	WEST	Furniture & Decor	15,000
WalMart	Walmart Centre Prairie	WEST	General Merchandise	200,000
WalMart	Walmart Centre Prairie	WEST	Grocery, Convenience & Specialty Foods	50,000
WalMart	Walmart Centre Prairie	WEST	Health & Beauty	5,000
WalMart	Walmart Centre Prairie	WEST	Home Improvement & Gardening	10,000
WalMart	Walmart Centre Prairie	WEST	Jewelry & Accessories	2,500
WalMart	Walmart Centre Prairie	WEST	Personal Services	2,000
WalMart	Walmart Centre Prairie	WEST	Pharmacy	5,000
WalMart	Walmart Centre Prairie	WEST	Quick Service F&B	3,000
WalMart	Walmart Centre Prairie	WEST	Specialty Retail	12,500
WalMart	Walmart Centre Prairie	WEST	Sporting Goods	5,000
WalMart	Walmart Centre Prairie	WEST	Toys & Hobbies	5,000
Wapiti Bean Coffeee	Westgate Centre - Monaco Square	WEST	Quick Service F&B	2,000
Wendy's	Freestanding	WEST	Quick Service F&B	3,000
Winners	Grande Prairie Power Centre	WEST	Fashion, Apparel & Footwear	25,440
Wok Box	Melcor Crossing Grande Prairie	WEST	Quick Service F&B	1,752
Your Dollar Store	Save On Foods Plaza	WEST	Specialty Retail	6,000

RETAIL
Market & Gap Analysis

City of Grande Prairie
Alberta
2023