NOVEMBER 2016

CHESTERMERE

RETAIL GAP ANALYSIS

Prepared for the City of Chestermere

Prepared by Cushing Terrell Architecture Inc.

CUSHING TERRELL ARCHITECTURE INC.

RETAIL
Gap Analysis

CHESTERMERE

CUSHING TERRELL
ARCHITECTURE INC.

Member of
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of Shopping Centers

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PREFACE

Cushing Terrell Architecture Inc. ("Cushing Terrell") was commissioned by the City of Chestermere in February 2016 to conduct a Retail Market and Gap Analysis for the City.

The study was carried out over the period of March to June 2016.

The objective of this study is to document in detail the City of Chestermere'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, which is also known as surplus/leakage.

Retail spending (i.e. demand), the City's retail inventory, and its corresponding productivity (i.e. supply) was estimated and supplemented by a detailed Consumer Intercept Survey conducted by Keyfax Market Research to further identify gaps in Chestermere's current provision of shops and services.

This document is intended to assist the City of Chestermere in promoting the community, working with developers and investors, as well as attracting new or expanding retailers and formats. It further aims to retain existing retailers and provide an overall strategy for future developments which could feature retail.

Reference material for this report was obtained from, but not limited to: the City of Chestermere, Commercial Real Estate Brokerage Firms, Conference Board of Canada, Local Commercial Developers (Melcor, Truman), International Council of Shopping Centers, and Cushing Terrell Architecture Inc.

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

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

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

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

Cushing Terrell Architecture Inc. - June 2016

EXECUTIVE SUMMARY

INTRODUCTION

The objective of this study is to thoroughly document the City of Chestermere'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

The City of Chestermere possesses a peaceful country lifestyle while still being a short drive away from metropolitan amenities such as Calgary's Downtown and International Airport. This attractive balance has resulted in a fast growing municipality with an advancing identity of its own, presenting the undeniable opportunity for further commercial and retail expansion.

Regional Context

With land recently annexed, the City's boundaries have expanded, providing the opportunity for further future development. This includes areas allocated for a variety of commercial opportunities, ranging from local shopping nodes to large commercial nodes, intended to attract local and regional residents.

Chestermere is very well connected to both Calgary and the surrounding region: Highway 1 and Highway 1A are directly accessible from the City, and the new Stoney Trail/Calgary Ring Road (Highway 201), a popular transportation route, is only a ten (10) minute drive away. These routes combine to make Chestermere accessible to both neighbouring and distant centres: a benefit for potential multi and chain store retail operations for whom timely access to markets are important.

The City itself has a population approaching 20,000 while its Trade Area caters to an estimated 45,000 people, spanning the City itself and the neighbouring Rocky View County mainly to the south and east including numerous hamlets, as well as the Town of Strathmore and the surrounding Wheatland County.

The significant population growth of Chestermere and recent annexation of surrounding land in 2009 suggests an attractive market for many types of retailers and businesses. Given the advantageous regional location of Chestermere, the community's growth and development is expected to continue into the foreseeable future.

As Chestermere continues to grow, the Waterbridge Master Area Structure Plan (MASP) and in particular the Chestermere Gateway Area Structure Plan (ASP) represent among the best geographic locations in the east Calgary region for future retail opportunities capable of tapping into an under-served, affluent, and rapidly growing residential market.

EXECUTIVE SUMMARY

The widely accepted notion that "*retail follows rooftops*" is proving to be valid in the City of Chestermere where retail growth and tenant prospects are supported by strong locational and site context attributes.

RETAIL TRADE AREA SUMMARY

The Trade Area for the City of Chestermere comprises the following Primary and Secondary Trade Areas:

Primary Trade Area (PTA) includes the City of Chestermere and the surrounding area east of the Stoney Trail Highway and within an approximate 10-minute drive time, such as the Hamlets of Conrich and Janet.

Secondary Trade Area South (STA South) is represented by the area located south of the PTA to Highway 22X and east to Highway 24 including the Hamlets of Langdon, Cheadle, and Indus.

Retail Trade Area

Secondary Trade Area East (STA East) includes the residents of Rocky View County in Delacour, but is primarily east of Highway 9 in Wheatland County including the Town of Strathmore, the Hamlets of Lyalta and Ardenode, as well as the Eagle Lake area.

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

East Hills in Calgary is currently open and developing to full buildout; CrossIron Mills is fully operational and undergoing an expansion. These power centres as well as Deerfoot Meadows include Chestermere in their PTA, and therefore it would be a challenge for the City of Chestermere to compete directly against these nodes.

Chestermere is under-served significantly by retail which represents a significant opportunity for tapping into spending that is leaking out of the community today.

The Retail Trade Area for Chestermere takes into account the reality of competitive influences nearby, and is adjusted accordingly. This includes the realization that residents of Chestermere and the communities to the east and south will favour the convenience and accessibility provided by retail in Chestermere in comparison to traveling further to the Calgary area.

The total Trade Area Demographic Profile illustrates a very strong local Trade Area that will grow from 45,000 in 2016 to approximately 54,000 over the next decade.

EXECUTIVE SUMMARY

Chestermere's strengths lie in its demographics, which are supported by a significant household income well above the regional and provincial averages. Secondly, the Trade Area has a strong and dynamic young family profile who are both mobile in their shopping patterns, yet are increasingly seeking opportunities to spend their money closer to home.

Overall, Chestermere represents a $690 Million (2016 estimates) retail market in which categories such as Grocery, Automotive/RV, Restaurants, and Electronics & Appliances represent significant spending segments.

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

RETAIL SUPPLY SUMMARY

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

The City of Chestermere has an estimated total retail floor space of approximately 267,000 square feet (sf) including vacant retail space.

When applying the retail inventory for the City of Chestermere against the City's population, the resulting per capita ratio is approximately 14.5 sf, which suggests the City is under-retailed and has a current day residual demand that could be as little as 5 sf to as much as 15 sf per capita, which translates to as little as 92,000 sf to 275,000 sf respectively.

Retail Spending Inflow / Outflow Estimates

Merchandise Category	Existing Inventory (SF)	Est. Current Annual Sales by Category (SUPPLY)	Est. Chestermere Expenditure Potential 2016 (DEMAND)	Chestermere Outflow / Inflow Estimates
Grocery & Specialty Foods	90,300	$50,575,000	$50,900,289	-$325,289
Alcohol & Tobacco	16,000	$8,125,000	$4,022,965	$4,102,035
Pharmacy	5,750	$3,406,250	$8,436,970	-$5,030,720
Personal Services	57,975	$8,490,000	$10,137,399	-$1,647,399
Clothing & Apparel	1,000	$250,000	$17,644,170	-$17,394,170
Footwear	0	$0	$4,893,917	-$4,893,917
Jewelry & Accessories	0	$0	$2,873,547	-$2,873,547
Health & Beauty	8,750	$3,210,938	$4,965,015	-$1,754,077
Home Electronics & Appliances	0	$0	$17,448,650	-$17,448,650
Home Furnishings & Accessories	0	$0	$24,434,035	-$24,434,035
Home Improvement & Gardening	0	$0	$5,936,688	-$5,936,688
Books & Multi-Media	0	$0	$3,643,776	-$3,643,776
Sporting Goods & Outdoor Recreation	0	$0	$4,230,335	-$4,230,335
Toys & Hobbies	0	$0	$2,766,900	-$2,766,900
Specialty Retail	12,950	$3,050,000	$6,191,456	-$3,141,456
Full Service F&B	36,000	$12,200,000	$8,570,398	$3,629,602
Limited Service F&B	24,125	$9,817,500	$6,206,150	$3,611,350
Entertainment & Leisure	0	$0	$10,439,566	-$10,439,566
VACANT	14,007			
TOTAL	**266,857**	**$99,124,688**	**$193,742,226**	**-$94,617,538**

EXECUTIVE SUMMARY

The biggest threat to Chestermere's retail outlook, particularly from a larger retail perspective will come from the newest developing project at East Hills in Calgary.

That said, there is sufficient growth forecast in Chestermere over the next decade to suggest that retail development closer to the City has the true potential to attract competing retailers who may not wish to locate at East Hills, but for whom the current voids in Chestermere, combined with its Trade Area represent an ideal fit.

The City's current retail inventory clearly illustrates an absence of a local presence for numerous retail categories and demonstrates the untapped potential for a wide variety of retail in the community.

Given the population of the Trade Area which is steadily increasing and has been doing so for some time, the opportunity exists in particular for retailers such as Canadian Tire, Real Canadian Superstore or Home Hardware to enter this market. At a minimum the Chestermere Gateway ASP provides a competitive alternative to East Hills for retailers looking to locate and tap into the Chestermere Trade Area.

On the basis of the City's current retail inventory, there is clearly a correlation between the City of Chestermere's evolution from a town to a city, whereby retail opportunities will follow demand. Accordingly, the City of Chestermere with its population approaching 20,000 residents, represents one of the best untapped retail opportunities in the entire Calgary region.

RETAIL DEMAND SUMMARY

Based on the City's current retail inventory of just under 267,000 sf, the City's residents are garnering a retained market share of approximately 31%.

The remaining nearly 70% of Chestermere resident spending is considered outflow and spent elsewhere in either the City of Calgary, Rocky View County, Strathmore, or elsewhere.

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

These findings are further validated by the Consumer Intercept Survey results.

If the City alone (meaning not including other trade areas) were able to increase its retained market share of resident spending, then corresponding demand could further increase at the following levels:

40% retained market share = additional 58,000 sf
50% retained market share = additional 122,000 sf
60% retained market share = additional 185,000 sf

These figures only represent the amount of space as of today. However, when factoring into the equation forecasted population growth in the Total Trade Area of approximately 9,200 over the next decade to 2026 (the majority of which will be in the City of Chestermere), then estimated future floorspace demand above and beyond residual demand could grow by approximately 180,000 to 230,000 sf (based on 20 to 25 sf per capita).

EXECUTIVE SUMMARY

When factoring future growth against the current residual demand, the forecasts suggest the City should focus its retail tenant recruitment strategy on specific tenants and merchandise categories that match Chestermere's strong spending profile and the noticeable gaps in the market, while also taking into account the competitive nature of projects such as East Hills.

Examples of target categories include Home Improvement, Sporting Goods, House & Home and General Merchandise.

Regardless of whether it is per capita or a market share methodology, Chestermere's demand could grow from an estimated 50,000 sf today to a more progressive range of 250,000 sf over the next 10 years, subject to tenant realities, population growth, deeper trade area penetration and economic conditions.

Cross-referencing the City's retail spending against the actual retail sales estimated for its current inventory yields an estimated total sales outflow of $95 million dollars (excluding Auto Parts & Auto Dealerships). When including Auto Parts & Auto Dealerships, the outflow increases to $141.6 million).

Home Improvement is a sought after category in the community and would require more aggressive market shares to validate a larger footprint store, however the spending is strong in this category and the competition is very limited and underserved in Chestermere, making this a very targeted option.

Similarly, Restaurants are a very competitive category in Chestermere and any new restaurant additions should be very targeted to the type of restaurant and food offering, so as to not impact existing businesses.

Chestermere's current marke profile of sales and outflow/inflow resembles in some respects that of a tourist market whereby categories such as restaurants have a high market share and exhibit strong inflow sales dollars. This is likely attributable to the summer tourist volume generated by the lake activities.

But as mentioned, caution should be acknowledged that the current inventory of restaurants is considered saturated and competitive, and could pose challenges for new entrants and existing businesses unless those new businesses provide a type of offering not currently in the market or desired by residents (e.g. Greek, Italian etc.).

The City should be cautious in how fast and how much space is added as it could require an expanded trade area west into the more competitve City of Calgary. Therefore, growth is overall better off by increasing the existing trade area penetration rather than trying to increase the boundaries of the trade area.

EXECUTIVE SUMMARY

CONSUMER SURVEY SUMMARY

The Consumer Intercept Survey yielded findings that validated the identified Trade Area, as well as the inclination of Chestermere's current need for more retail especially as the community continues its growth and expansion.

Chestermere Station which has a Safeway and Sobeys Liquor, and East Calgary Costco served as substantial draws for Primary Convenience shopping.

Sunridge Mall and CrossIron Mills are the most dominant specific Primary Comparison shopping choices for respondents.

Interestingly, the highest number of responses was garnered by the response "No Primary Comparison", which is an indicator of the mobility of people to likely patronize other shopping nodes in the region beyond the list surveyed.

The majority of respondents indicated a desire to have more Full Service Restaurants, Entertainment & Recreation, Home Improvement & Garden, and Clothing/Apparel retail options. These categories were also identified as high spending categories for the entire Retail Trade Area.

Consumer Survey Respondents

EXECUTIVE SUMMARY

Specifically, the Top 3 Full Service Restaurants most sought after in Chestermere by respondents were:

1. *The Keg*
2. *Earls Kitchen & Bar*
3. *Cactus Club*

In fact, brands and categories of Full Service restaurants were mentioned 267 times when respondents were allowed to provide open ended responses with multiple brands, thus by far the most sought after category type desired by residents and visitors to Chestermere.

Excluding Home Improvement categories, which garnered an overwhelmingly significant response, the Top 5 retailers most sought in Chestermere by respondents included the following:

1. *Canadian Tire*
2. *Sport Chek*
3. *Chapters/Indigo*
4. *Best Buy*
5. *Real Canadian Superstore*

Top Comparison Retailer Responses

Top Comparison (10 or more responses)	Number of Responses
Home Hardware	50
Canadian Tire	49
Home Depot	38
Sport Chek	37
RONA	29
Chapters/Indigo	28
Best Buy	25
Real Canadian Superstore	23
Lowes/REVY	21
Staples	20
Mark's	18
Winners	16
WalMart	16
Michaels Crafts	16
Costco	15
Old Navy	12
Home Sense	12
Toys R Us	11
Reitmans	10
Payless Shoes	10
The Brick	10

Top Full Service Restaurant Responses

Full Service Restaurant Tenant (5 or more Responses)	Number of Responses
The Keg	36
Greek/Italian	23
Earls	22
Cactus Club	18
Ricky's Grill	17
Olive Garden	16
Swiss Chalet	16
Denny's	14
Joey Tomatoes	9
Red Lobster	8
Cora	8
Montana's Cookhouse	7
Chinese	6
Chili's	5
Thai	5
East Side Mario's	5
IHOP	5

1.0 introduction

1.1 SCOPE OF STUDY & PROJECT BACKGROUND

Cushing Terrell Architecture Inc. ("Cushing Terrell") was commissioned by the City of Chestermere in February 2016 to conduct a Modified Retail Market and Gap Analysis for the City and its various retail areas/nodes.

The study was carried out over the period of March to May 2016.

The objective of this study is to analyze the City of Chestermere's current retail inventory and estimate the realistic Trade Area and its inherent retail expenditure profile across various categories/store types as an indication of retail inflow/outflow, also known as surplus/leakage.

1.2 REPORT STRUCTURE

Cushing Terrell conducted on-the-ground research in March 2016 to gain a firm understanding of existing and future retail projects and prospects in Chestermere. The purpose of this research was to establish a solid foundation and baseline for determining the depth of retail opportunity, associate gaps in the market provision of shops and services, and to determine what type of retail could fill these gaps.

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 Chestermere as a location where targeted retailers could express interest.

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

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

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

Section 6 – Consumer Intercept Survey:
A Consumer Intercept Survey was conducted by Keyfax Market Research in which the residents of Chestermere and the surrounding area were interviewed.

Photo credit: Cushing Terrell Architecture Inc. 2016

Photo credit: Cushing Terrell Architecture Inc. 2016

An in-person questionnaire tool was used to determine shopping patterns and consumer preferences for retail tenants and formats in the City of Chestermere. Also attained were current spending habits and importance ratings for the types of new retail categories that the City could pursue to enhance the offering and retain expenditure within the community.

Section 7 – Conclusion:
Conclusions highlight and summarize the most pertinent Market Analysis findings as well as missing merchandise categories, and identify a roster of potential market-compatible retailers whose typical site selection criteria match the trade area demographics and locational attributes of Chestermere.

1.3
SOURCES OF INFORMATION

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

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

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

- Alberta Ministry of Transportation, Highways 1 to 986 Traffic Volume History 2003-2015
- Bayfield Area Structure Plan
- Chestermere Community Profile
- Chestermere Gateway Area Structure Plan
- City of Chestermere Land Use Bylaw, 2011
- City of Chestermere Municipal Development Plan, 2009 & 2016 Draft
- Cushing Terrell Architecture Inc. Detailed Retail Inventory Fieldwork, March 2016.
- East Acreages Area Structure Plan
- Keyfax Market Research Consumer Intercept Survey, April 2016
- Pitney Bowes Demographics & Spending Data, January 2016
- Rocky View County Plan, 2013
- Waterbridge Master Area Structure Plan

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

- Coldwell Banker Commercial
- Colliers International
- Conference Board of Canada Metropolitan Outlook, Spring 2016
- International Council of Shopping Centers
- Ivanhoé Cambridge
- Melcor Developments Ltd
- Primaris REIT
- Prime Developments
- RioCan
- Safeway Holdings Ltd
- Statistics Canada
- Truman Development

Figure 2.1

CITY OF CHESTERMERE REGIONAL CONTEXT

2.0 location context

2.1 INTRODUCTION

Location factors are an essential foundation to retail success, and an understanding of these factors can help create the necessary conditions for attracting and retaining retail businesses in a community. This section identifies the City of Chestermere'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 Chestermere regional context as it relates to Rocky View County, the City of Calgary and other surrounding cities/towns.

2.2 REGIONAL CONTEXT

Located within the east-central area of Rocky View County, the City of Chestermere is advantageously positioned on the eastern border of the City of Calgary, in an area known for its dynamic and expanding opportunities. Chestermere maintains a distinct community identity assisted greatly by the presence of a large lake within the city, providing year-round outdoor activities for the enjoyment of residents and visitors alike. Having gained "City" status on January 1, 2015, peaceful country living is a standard for this rapidly growing, yet under-served community: a characteristic that attractively coexists with the accessibility of being approximately twenty minutes (20) from downtown Calgary, and fifteen (15) minutes from the Calgary International Airport. This combination of rural serenity and urban convenience are important factors that contribute to Chestermere being one of the fastest growing municipalities in Canada.

As Chestermere continues to grow and its identity as a self-sufficient community further solidifies, the opportunity for retail expansion is evident.

Chestermere is very well connected to both Calgary and the surrounding region: Highway 1 and Highway 1A are directly accessible from the City, and the new Stoney Trail/Calgary Ring Road (Highway 201), a popular transportation route, is only a ten (10) minute drive away. These routes combine to make Chestermere accessible to both neighbouring and distant centres: a benefit for potential multi and chain store retail operations for whom timely access to markets are important.

The City itself has a population approaching 20,000 while its Trade Area caters to an estimated 45,000 people, spanning the City itself and the neighbouring Rocky View County mainly to the south and east including numerous hamlets, as well as the Town of Strathmore and the surrounding Wheatland County.

While certain retail tenants may be more inclined to locate in larger metropolitan areas such as Calgary, the significant population growth of Chestermere and recent annexation of surrounding land in 2009 suggests an attractive market for many types of retailers and businesses. Given the advantageous regional location of Chestermere, the community's growth and development is expected to continue into the foreseeable future.

2.3 TRANSPORTATION CONTEXT

One of the most significant aspects to successful commercial development relates to patterns of transportation. The ability to be accessible as well as visible to high volumes of traffic are among the most influential considerations for retail businesses. For a market such as Chestermere, a retail location relative to strong and accessible transportation patterns remains an important component, as exhibited by the locations of future retail developments along high traffic corridors.

Figure 2.2

CITY OF CHESTERMERE 20-MINUTE DRIVE TIME

Accordingly, **Figure 2.3** reveals the major high volume traffic corridors, which are primarily located along Hwy 1 and Hwy 1A (Chestermere Boulevard).

The Alberta Ministry of Transportation provides detailed traffic counts on major highways. The most recent 2015 data from this Provincial source is shown in **Figure 2.3**, along with the City of Chestermere's most recent localized counts. Both count sources are in the form of Average Annual Daily Traffic (AADT) and are for the following intersections:

1) Hwy 1 at Rainbow Road (Province)

South on Rainbow Road = 350
East on Hwy 1 = 24,730
West on Hwy 1 = 25,000

2) Hwy 1A at Rainbow Road (Province)

South on Rainbow Road = 13,980
East on 1A = 13,300
West on Hwy 1A = 17,740

3) Rainbow Road south of W Lakeview Drive (City)

North/South on Rainbow Road = 7,773

4) Hwy 1A at W Chestermere Drive (Province)

North on Local Road = 13,470
South on Local Road = 5,300
East on Hwy 1A = 14,110
West on Hwy 1A = 10,660

5) Hwy 1 at Hwy 1A (Province)

North on Hwy 1 = 23,040
South on Hwy 1 = 22,010
East on Local Road = 1,600
West on Hwy 1A = 12,030

6) Hwy 1 at Hwy 791 (Province)

East on Hwy 1 = 18,150
West on Hwy 1 = 19,280

Traffic patterns closely mirror retail hot spots particularly in the central areas where the largest concentrations of traffic flow are in the range of 20,000 - 23,000 AADT and for which regional traffic is important for larger format and "Power Centre" type uses.

2.4 LAND USE BYLAW

The City's Land Use Bylaw addresses commercial land-use in a variety of districts, which are listed below:

- Local Commercial District (C)
- Town Centre Commercial District (TC)
- Eastern Town Centre Commercial District (ETC)
- Interim Commercial District
- Business Park/Light Industrial District (BP/LI)

Figure 2.3
CITY OF CHESTERMERE TRAFFIC COUNTS

Figure 2.4

CITY OF CHESTERMERE DRAFT LAND USE MAP (Draft as of March 8, 2016)

Figure 2.5 shows the commercial lands in the City. The areas shown in solid colours depict land currently zoned for Commercial Land Uses; Future Land Use is shown in gradient form.

The map illustrates concentrations of Commercial lands in which existing as well as major future commercial development may be situated.

Traffic patterns generally mirror the locations where retail nodes could be prominent and where such counts are in excess of 15,000 AADT and for which traffic is important for potential developers and retailers.

2.5 MUNICIPAL DEVELOPMENT PLAN

The City's 2016 Draft Municipal Development Plan (MDP) addresses long-term retail and commercial development within its Land Use Goals. This includes the goal to be a community which is economically sustainable within the Calgary region, with a strong local work force and a high quality of life.

"Chestermere will seek to increase the opportunities for new businesses and local employment to improve the economic health of the community." - MDP Part. 3.6.

Figure 2.5
COMMERCIAL LAND USE DISTRICTS

Figure 2.6

CITY OF CHESTERMERE FUTURE DEVELOPMENT AREAS

The MDP illustrates a strategic allocation of land for Mixed-Use Commercial and Employment Lands: uses which provide retail opportunities for both local and regional residents.

Goals for these retail oriented land uses include the accommodation of "*commercial development in a manner that meets the needs of residents and improves residents' ability to take transit, walk, and cycle to mixed-use commercial nodes*", as well as making spaces that additionally function as public meeting spaces, and to "*increase opportunities for new businesses and local employment in serviced and integrated employment lands adjacent to key transportation corridors*".

Major growth and development is planned on lands to the west, east, and south of the already existing city footprint. Further development to the west is limited by the City of Calgary boundary and to the south by the Rocky View Future Industrial Growth Corridor.

Business Park areas are distributed close to residential neighbourhoods, and will provide a large opportunity for local employment, as well as bolstering the economic health of Chestermere.

Some examples of intended use for commercial areas in the MDP **(Figure 2.4)** include:

Mixed-Use Commercial: Downtown

- this comprises the current area where Chestermere Station is located, and is intended to be further developed to increase the intensity of land use.
- land is intended to exceed the Calgary Metropolitan Plan's minimum intensity threshold of 100 people and jobs per gross developable hectare.
- downtown is planned to provide the most diverse variety of residential, retail, service, institutional, and recreational opportunities within Chestermere.

Mixed-Use Commercial: Centre

- these areas are intended to provide regional and local retail offerings, being well positioned on major transportation corridors to draw in large volumes of customers. Areas where this land use is intended are along Chestermere Boulevard in the future planned Waterbridge neighbourhood, as well as along Highway 1 in the future planned Bayview neighbourhood.
- land use intended for these areas includes a wide variety of residential, retail, service, and institutional provisions.

Mixed-Use Commercial: Neighbourhood

- Mixed-Use: Neighbourhood supports medium density residential and mixed-use development, including the currently developed commercial areas of Chestermere Towne Square, Chestermere Plaza, Rainbow Falls Commercial, and Chestermere Centre (Chestermere Health & Commercial Centre). Future areas to be developed under this land use includes the Village Centre in Waterbridge, and the Neighbourhood Commercial Centre in East Acreages.
- retail and services are to be provided which cater to surrounding residential neighbourhoods, including being accessible by walking.
- this land use is intended to serve as community focal points where people can gather and actively participate in the public realm.

With recent growth trends in the City and continued growth forecasted into the future, Chestermere has the identity of an up-and-coming community with immense potential.

The overall mix of commercial-use opportunity in Chestermere, albeit currently under served, in combination with future planned areas of development, make for an attractive setting for both retailers and residents alike.

Figure 2.7

WATERBRIDGE MASTER AREA STRUCTURE PLAN (MASP)

Figure 2.8

WATERBRIDGE CHESTERMERE GATEWAY ASP URBAN CENTRE

Figure 2.9

CHESTERMERE GATEWAY ASP FUTURE POTENTIAL COMMERCIAL NODES

Figure 2.10

EAST ACREAGES LAND USE MAP

Figure 2.11

EAST ACREAGES CONCEPT PLAN RENDERING

The growth of Chestermere has necessitated annexation as well as the establishment of new areas to accommodate future growth for both residential, commercial and employment opportunities.

The following provides a profile of these future growth nodes. Most significant of these is the Waterbridge Community as profiled in the following and documented in **Figures 2.7 to 2.9**.

2.5.1 Waterbridge

On the recently annexed land between the Calgary and Chestermere boundary shown in **Figure 2.7**, a significant addition to the City of Chestermere is being master planned, which is estimated to increase the City population by an additional 46,000 residents.

According to the Waterbridge Area Structure Plan (ASP) shown in **Figure 2.7**, the 972 hectares of land is envisioned to be developed as primarily residential, with strategic areas allocated for commercial land use to serve both local and regional residents.

Within the Waterbridge Master Area Structure Plan, the **Chestermere Gateway Area Structure Plan** is the first community for development, consisting of 512 hectares of land. Commercial areas within the Chestermere Gateway ASP consist of the following formats as shown in **Figures 2.8 & 2.9**:

Village Centre – this mixed use node is planned for the northwestern corner of Gateway, as an area of the neighbourhood where residents can shop, work, and live. As a secondary community focal point, proposed retail is envisioned to take the form of local shopping and services.

The Town Centre – intended to be a regional commercial centre, the Town Centre is a pedestrian oriented main street with shopping and entertainment options. Located on Chestermere Boulevard, it is well positioned to serve as the gateway to Chestermere and the focal point of Waterbridge. Two specific areas of commercial are planned:

1. ***High Street Commercial*** – smaller scale commercial uses, similar to downtown shops and services, with pedestrian oriented features such as wide sidewalks, street parking and storefront facades. This retail area is meant to promote a blend of shopping and social activity in one location.
2. ***General Commercial Area*** – small, medium, and large format retail stores, including anchor tenants to serve as a regionally attractive shopping location.

A Transitional Use Corridor is also planned to be incorporated along Chestermere Boulevard, which would include high to medium density residential such as townhouses and apartments, with commercial land use seamlessly coexisting as well.

Waterbridge is forecast over an estimated 30-year time frame to accommodate a population of 46,000, with Chestermere Gateway forecasting a buildout population of 20,000, which on its own could support in the range of 400,000 to 600,000 sf of retail space.

2.5.2 East Acreages

Referring to **Figures 2.10 & 2.11**, East Acreages is a proposed development spanning 138 hectares in the east/southeast area of Chestermere.

Photo credit: Cushing Terrell Architecture Inc. 2016

There is one area of planned Neighbourhood Commercial in the East Acreages development, located at the intersection of Range Road 281 and Township Road 241A. A Market Study prepared in conjunction with the East Acreages ASP suggested a total retail floor space in the range of 50,000 sf.

Retail and office uses are permitted, with office use on the upper storeys (to a maximum of 3 storeys). The types of commercial uses are intended to be ones that provide for the daily needs of the surrounding neighbourhoods. According to the East Acreages ASP, for which approval has currently been postponed, full development of the area could take 20 to 30 years and comprise a population in the range of 5,000 to 7,000 residents.

2.5.3
Bayfield

Located in the northeast section of Chestermere, Bayfield is a 393 hecatre area of future development, with an ASP outlining the proposed land use allocation. The Chestermere MDP states land use is to incorporate Mixed-Use Commercial: Centre, Employment Lands, and Residential Neighbourhood.

The land is advantageously located adjacent to Highway 1, which bodes well for such uses as industrial distribution and logistics, as well as retail for both local and regional residents.

2.6 SUMMARY & IMPLICATIONS

The City of Chestermere possesses a peaceful country lifestyle while still being a short drive away from metropolitan amenities such as a large downtown and international airport. This attractive balance has resulted in a fast growing municipality with an advancing identity of its own, presenting the undeniable opportunity for further commercial and retail expansion.

With recently annexed lands expanding the City boundaries, future planned areas of growth include strategic allocation for a variety of commercial opportunities, ranging from local shopping nodes to large commercial nodes intended to attract local and regional residents.

As Chestermere continues to grow, the Waterbridge MASP and in particular the Chestermere Gateway ASP represent among the best geographic locations in the east Calgary region for future retail opportunities capable of tapping into an under-served, affluent and rapidly growing residential market.

The widely accepted notion that "*retail follows rooftops*" is proving to be the case and valid in the City of Chestermere where retail growth and tenant prospects are supported by strong locational and site context attributes.

Photo credit: www.theanchor.ca, 2013 Waterfest

3.0 retail trade area

3.1 INTRODUCTION

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

The Trade Area recognizes drive times, demographics, spending attributes and competition, which collectively portray the market to prospective tenants, developers and investors.

Identifying the Trade Area is important for understanding the total market potential available to current and future retailers. The local and regional residential base has particular demographic and spending habits that provide insight as to the type of compatible retail tenants, the amount of retail floor space supportable in the market, and the current inflow or outflow of retail sales, and for which categories such inflow or outflow exists.

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.

Major considerations in defining a Retail Trade Area were applied to the City of Chestermere to determine its most realistic Trade Area, as well as to help sensitize potential market share inputs from respective Trade Areas.

Retail Trade Area Determinants

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

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

iii. Overall Community development vision, including an understanding of key nodes' characteristics;

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

v. City's proposed generative uses (retail, cultural, civic, etc.) and their relationship within the wider market;

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

vii. De facto barriers resulting from notable socioeconomic differentiation;

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

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

A Trade Area is typically subdivided to provide a more refined analysis of the City's retail opportunity. These subdivisions include a Primary Trade Area from which the majority of retail sales originate, and a series of Secondary Trade Areas, each of which is specifically determined based on factors such as transportation, population, geographic barriers, etc.

Figure 3.1

CITY OF CHESTERMERE RETAIL TRADE AREA

3

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

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

Primary Trade Area (PTA) includes the City of Chestermere and the surrounding area east of the Stoney Trail Highway and within an approximate 10-minute drive time, such as the Hamlets of Conrich and Janet.

Secondary Trade Area South (STA South) is represented by the area located south of the PTA to Highway 22X and east to Highway 24. This includes the Hamlets of Langdon, Cheadle, and Indus.

Secondary Trade Area East (STA East) includes the residents of Rocky View County in Delacour, but is primarily east of Highway 9 in Wheatland County including the Town of Strathmore, the Hamlets of Lyalta and Ardenode, as well as the Eagle Lake area.

3.2 POPULATION PROJECTIONS

Using data sources that include the City of Chestermere (which recently completed a Municipal Census in 2015), Statistics Canada, and Pitney Bowes (2016), population estimates and growth forecasts were tabulated for each of the identified Trade Areas and further compared to the Calgary and Alberta averages, where applicable.

Chestermere's most recent census data is used for certain projections, but for the purposes of this study, Cushing Terrell uses the Pitney Bowes 2016 data for demographics and spending for statistical consistency as a baseline wherever possible.

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

Tables 3.1 & 3.2 provide a breakdown of the Trade Area Population in which the Primary Trade Area is shown to include the municipal boundaries of the City of Chestermere.

The Total Trade Area (PTA + STA S + STA E) population is estimated for 2016 to be just over 45,000. This population is forecast to surpass 47,000 by 2019, 49,000 by 2021, and 54,000 by 2026.

Within the Total Trade Area, the Primary Trade Area (PTA), which as noted includes the City of Chestermere, is estimated to have a population around 22,300, of which approximately 18,496 are City residents. The PTA is forecast to grow robustly and exceed 24,000 people by 2019.

Although the PTA may be localized in its reach, it is worth noting that within a 20-minute drive time of the City of Chestermere lies a population catchment that exceeds 310,000 residents.

Over the period of 2011 to 2015, population growth in Chestermere can be compared to regionally similar municipalities, using Municipal Census information for each respective City:

- Chestermere: 14,682 to 18,496 (26%)
- Airdrie: 43,155 to 58,690 (36%)
- Cochrane: 17,580 to 23,084 (31%)
- Okotoks: 24,511 to 28,016 (14%)

Table 3.1

CITY OF CHESTERMERE RETAIL TRADE AREA DEMOGRAPHIC SUMMARY

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

2016 Demographic Snapshot	Primary Trade Area		Secondary Trade Area South		Secondary Trade Area East	
		%		%		%
2011 Census*	19,023		5,236		14,932	
2016 Population estimate	22,321		6,317		16,546	
2019 Population projection	24,021		6,579		17,144	
% Population Change (2011-16)	17.3%		20.7%		10.8%	
% Population Change (2016-19)	7.6%		4.1%		3.6%	
2016 Population by Age	**22,321**		**6,317**		**16,546**	
0 to 4 years	1,602	7%	606	10%	1,122	7%
5 to 19 years	4,750	21%	1,508	24%	3,335	20%
20 to 24 years	1,174	5%	239	4%	1,044	6%
25 to 34 years	2,986	13%	937	15%	2,161	13%
35 to 44 years	3,844	17%	1,347	21%	2,401	15%
45 to 54 years	3,393	15%	903	14%	2,207	13%
55 to 64 years	2,567	12%	480	8%	2,046	12%
65 to 74 years	1,275	6%	209	3%	1,304	8%
75 to 84 years	516	2%	77	1%	664	4%
85 years and over	213	1%	11	0%	262	2%
Median Age	36.6		34.0		37.5	
2016 Families	**6,659**		**1,883**		**4,898**	
Married couples	5,360	80%	1,492	79%	3,591	73%
Without children at home	1,931	29%	462	25%	1,619	33%
With children at home	3,429	51%	1,030	55%	1,972	40%
Common-law couples	641	10%	226	12%	639	13%
Without children at home	351	5%	119	6%	357	7%
With children at home	290	4%	108	6%	281	6%
Lone-parent families	658	10%	165	9%	668	14%
Average Persons Per Family	3.0		3.1		2.9	
Average Children Per Family	1.2		1.2		1.0	
2016 Households	7,084		2,015		6,115	
Persons per household	3.2		3.1		2.7	
Average household income	$ 152,173		$ 144,513		$ 105,124	
Median Estimated Household Income	$ 130,333		$ 125,022		$ 88,132	
2016 Population 25 to 64 years by Educational Attainment	**12,790**		**3,667**		**8,816**	
No certificate, diploma or degree	1,615	13%	336	9%	983	11%
High school diploma or equivalent	3,344	26%	1,034	28%	2,307	26%
Apprenticeship or trades certificate or diploma	1,485	12%	580	16%	1,458	17%
College, CEGEP or other non university certificate or diploma	3,251	25%	1,060	29%	2,409	27%
University certificate or diploma below bachelor level	581	5%	79	2%	248	3%
Bachelor's degree	1,972	15%	486	13%	1,205	14%
University certificate, diploma or degree above bachelor level	541	4%	94	3%	205	2%
Top 3 Dominant Languages	English Punjabi Vietnamese		English Punjabi French		English Tagalog (Pilipino) German	

** Population counts have been adjusted by MapInfo for census undercounts.*

Table 3.2

TRADE AREA POPULATION PROJECTIONS SUMMARY 2011 TO 2026

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

2016 Estimates and Projections Population Trends	Primary Trade Area	Secondary Trade Area South	Secondary Trade Area East
Total Population			
2011 Census*	19,023	5,236	14,932
2016 estimated	22,321	6,317	16,546
2019 projected	24,021	6,579	17,144
2021 projected	25,153	6,755	17,545
2026 projected	28,431	7,301	18,608
Change in Population (persons)			
2011 to 2016	3,298	1,082	1,614
2016 to 2019	1,700	262	598
2019 to 2021	1,132	175	401
2021 to 2026	3,279	546	1,063
Change in Population (percent)			
2011 to 2016	17.3%	20.7%	10.8%
2016 to 2019	7.6%	4.1%	3.6%
2019 to 2021	4.7%	2.7%	2.3%
2021 to 2026	13.0%	8.1%	6.1%
Rate of Change in Population (percent per year)			
2011 to 2016	3.5%	4.1%	2.2%
2016 to 2019	2.5%	1.4%	1.2%
2019 to 2021	2.4%	1.3%	1.2%
2021 to 2026	2.6%	1.6%	1.2%

Figure 3.2

RETAIL TRADE AREA POPULATION GROWTH RATES

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

Figure 3.3

TRADE AREA POPULATION AGE BREAKDOWN

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

Table 3.3

TRADE AREA POPULATION AGE BREAKDOWN

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

2016 Estimates and Projections Population by Age and Sex	Primary Trade Area		Secondary Trade Area South		Secondary Trade Area East	
		%		%		%
2016 Estimated Population	**22,321**	**% base**	**6,317**	**% base**	**16,546**	**% base**
0 to 4 years	1,602	7%	606	10%	1,122	7%
5 to 9 years	1,792	8%	685	11%	1,157	7%
10 to 14 years	1,568	7%	490	8%	1,129	7%
15 to 19 years	1,390	6%	333	5%	1,048	6%
20 to 24 years	1,174	5%	239	4%	1,044	6%
25 to 29 years	1,144	5%	287	5%	1,001	6%
30 to 34 years	1,842	8%	650	10%	1,161	7%
35 to 39 years	2,038	9%	731	12%	1,204	7%
40 to 44 years	1,806	8%	615	10%	1,198	7%
45 to 49 years	1,734	8%	507	8%	1,087	7%
50 to 54 years	1,658	7%	396	6%	1,120	7%
55 to 59 years	1,426	6%	284	4%	1,112	7%
60 to 64 years	1,141	5%	197	3%	934	6%
65 to 69 years	803	4%	129	2%	780	5%
70 to 74 years	472	2%	80	1%	524	3%
75 to 79 years	298	1%	42	1%	405	2%
80 to 84 years	218	1%	35	1%	259	2%
85 years and over	213	1%	11	0%	262	2%
Median Age	36.6		34.0		37.5	
Dominant Age Group	35 to 39		35 to 39		35 to 39	

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

Figure 3.2 illustrates the Trade Area's population growth rates which going into the future will be driven by the Primary Trade Area, including the City of Chestermere. This suggests that support for new retail shops and services will continue to expand with an increasing population base.

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

3.3 AGE PROFILE

A summary of the current age profile, as documented in **Figure 3.3 and Table 3.3** reveal a very strong family profile with a significant segment in the 30-44 year age bracket as well as the 0-9 year age bracket. The median age in the City of Chestermere and PTA is 36.6 years of age.

Table 3.2 reveals that 30% of the Primary Trade Area's population is currently between the ages of 25 to 44 years. This age cohort represents not only the family building stage, but also the income earning stage. A strong and young family demographic profile is a critical prerequisite for many retailers looking at entering a market or establishing another location in an existing market.

From a retail perspective, spending on discretionary items such as Automobiles & Recreational Vehicles/Motorsports, Fashion, House & Home, Food & Beverage (away from home), Sporting Goods, and Entertainment & Leisure is expected to be quite strong, especially in a community with abundant recreational opportunities and prominent family demographics (refer to **Figure 3.3 & Table 3.3**).

While a project such as East Hills is being built on the Chestermere/Calgary border, there is an increasing awareness of the role that supporting local businesses has in fostering a sense of place and positively benefiting a community. This is demonstrated in Chestermere's Municipal Development Plan, where the Vision states for "*shopping, cultural, institutional, community health and social services ... [to be] located within the Town*" (page 5).

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. Consequently, some retail nodes will not compete, nor can they, with larger comparison retail nodes, such as at East Hills.

However, in an under served market like Chestermere, 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 planned future developments of Town Centres, High Streets and Village Centres.

Restaurants, both family-casual as well as craft brewery/pub formats are also well-served in being close to residential areas, given justified societal concerns over drinking and driving.

Table 3.4

TRADE AREA AVERAGE HOUSEHOLD INCOME BREAKDOWN

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

2016 Estimates and Projections Income Trends	Primary Trade Area	Secondary Trade Area South	Secondary Trade Area East
Average household income			
2016 estimated	$ 152,173	$ 144,513	$ 105,124
2019 projected	$ 163,991	$ 156,117	$ 111,454
2021 projected	$ 171,881	$ 163,912	$ 115,683
Aggregate household income ($000)			
2016 estimated	$ 1,077,921	$ 291,165	$ 642,822
2019 projected	$ 1,245,276	$ 328,192	$ 722,069
2021 projected	$ 1,373,523	$ 357,320	$ 777,203
Change in average household income			
2016 to 2019	$ 11,818	$ 11,603	$ 6,330
2019 to 2021	$ 7,890	$ 7,795	$ 4,230
Change in aggregate household income ($000)			
2016 to 2019	$ 167,355	$ 37,028	$ 79,248
2019 to 2021	$ 128,247	$ 29,128	$ 55,134

Figure 3.4

TRADE AREA AVERAGE HOUSEHOLD INCOME BREAKDOWN

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

Chestermere at its core is a bedroom community, and many of the residents will still seek shopping opportunities in areas where there is a critical mass of offering. The relative proximity of new large nodes including East Hills, as well as other established centres such as Deerfoot Meadows and CrossIron Mills (to be discussed in the following section), will continue to attract the strong demographic segment that resides in Chestermere, particularly for Department Store Type Merchandise (DSTM) such as Fashion, Electronics and Home Furnishings.

Therefore, Chestermere should look to consolidating and focusing on a provision of shops and services that are most compatible and sought by the target demographic profiles, which would include home improvement, mid-priced fashion, restaurants, conveniences and personal services.

3.4 HOUSEHOLD INCOME PROFILE

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

A summary of the current average Household Income in the Retail Trade Area as documented in **Table 3.4 and Figure 3.4,** reveals an average Household Income in 2016 estimated at $152,173 in the City of Chestermere and its Primary Trade Area. By comparison, the City of Calgary 2016 average Household Income is estimated at $129,022. The City of Chestermere is over $23,000 higher than the City average and over $32,800 higher than the Provincial average.

Table 3.3 reveals that Average Household Income in the Primary Trade Area is forecast to grow at a rate of 7.8%, over the 3-year period 2016 to 2019, and 4.8% from 2019 to 2021.

Figure 3.5 illustrates that approximately 52% of households in the PTA have an average Household Income of greater than $125,000.

To supplement these figures, the Consumer Intercept Survey (refer to **Section 6.0**) documented a similar trend whereby over 49% of all respondents indicated a household income of higher than $100,000 per annum.

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

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

Home ownership is very high in Chestermere and the surrounding area, with data suggesting 95% of dwellings in the PTA being owned by the occupant. Furthermore, 83% of the houses in the PTA are single-detached dwellings.

Home ownership often allows for expanded customization of the dwelling such as through accessories, decor, and interior design; primarily single-detached dwellings also suggests yard space which requires maintenance as well as potential for outdoor decor and accessories.

Table 3.5

TRADE AREA RETAIL SPENDING

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

Retail Spending by Merchandise Category	PTA Including Chestermere Aggregate Retail Spending	STA South Aggregate Retail Spending	STA East Aggregate Retail Spending	City of Chestermere Aggregate Retail Spending	TOTAL Trade Area Aggregate Retail Spending
Grocery & Specialty Foods	$64,678,818	$15,810,840	$38,774,695	$50,900,289	$119,264,353
Pharmacy	$5,386,801	$1,503,854	$4,501,653	$4,022,965	$11,392,308
Alcohol & Tobacco	$11,227,463	$4,513,598	$10,144,410	$8,436,970	$25,885,471
Personal Services	$12,789,933	$4,006,201	$8,364,288	$10,137,399	$25,160,422
Clothing & Apparel	$22,611,173	$6,241,604	$13,516,370	$17,644,170	$42,369,147
Footwear	$6,272,201	$1,791,175	$3,885,457	$4,893,917	$11,948,833
Jewelry & Accessories	$3,868,973	$1,422,344	$2,704,415	$2,873,547	$7,995,732
Health & Beauty	$6,234,999	$1,624,080	$3,697,175	$4,965,015	$11,556,255
Home Furnishings & Accessories	$20,654,365	$8,851,951	$13,938,579	$17,448,650	$43,444,895
Home & Personal Electronics & Appliances	$29,872,938	$9,245,235	$17,824,036	$24,434,035	$56,942,209
Home Improvement & Gardening	$7,633,782	$1,888,987	$4,570,119	$5,936,688	$14,092,888
Books & Multimedia	$4,761,813	$1,224,683	$2,772,881	$3,643,776	$8,759,378
Sporting Goods & Recreation	$5,096,628	$1,257,287	$2,453,372	$4,230,335	$8,807,288
Toys & Hobbies	$3,392,792	$935,324	$2,025,459	$2,766,900	$6,353,574
Specialty Retail	$7,790,029	$2,736,687	$5,694,106	$6,191,456	$16,220,823
Full Service Restaurants	$10,646,075	$2,810,535	$6,366,901	$8,570,398	$19,823,511
Limited Service Restaurants	$7,709,227	$2,035,215	$4,610,514	$6,206,150	$14,354,956
Entertainment & Leisure	$13,362,839	$3,930,804	$7,879,319	$10,439,566	$25,172,962
Auto Parts & Accessories	$4,880,859	$1,385,665	$3,200,795	$3,886,694	$9,467,318
Auto/RV/Motorsports Dealerships	$52,982,614	$18,734,999	$36,766,353	$43,103,202	$108,483,966
TOTAL RETAIL CATEGORIES ONLY	**$301,854,323**	**$91,951,067**	**$193,690,899**	**$240,732,122**	**$587,496,290**

Figure 3.5

AGGREGATE RETAIL SPENDING BY TRADE AREA

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

PTA Including City of Chestermere STA South STA East

51%

PTA INCLUDING CHESTERMERE RESIDENTS' SHARE OF TOTAL TRADE AREA SPENDING

In a typical market, this figure should be 70% or more.

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 retail within the City of Chestermere.

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 of retail spending within the Trade Area was collected from Pitney Bowes, a leading supplier of demographic and consumer expenditure information, using January 2016 data. The data was compiled into groups according to where the respondent was from in order to build a spending profile for each respective Trade Area.

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

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

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

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

As illustrated in **Table 3.4**, the Total Trade Area for the City of Chestermere is estimated at $587 Million (2016 estimate).

Chestermere is a new and emerging retail area, but currently is still considered more locally-driven, as opposed to regional. This pattern is evidenced not only in the retail offering, but in the fact that over half of the Trade Area retail spending originates within the PTA, of which 41% comes from City of Chestermere residents alone. **The City should be striving for a target PTA ratio of 70% of total trade area spending.**

Additionally, given the proximity of Calgary and its new power centre East Hills located adjacent to Chestermere, the ability to tap into spending further west is expected to be competitive. However, opportunities to create a solidified and stronger retail presence to support forecasted population growth in the City of Chestermere and its PTA is evident and will be supported by growth in the market.

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

Figure 3.6

TRADE AREA RETAIL SPENDING SUMMARY 2016

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

Figure 3.7

TRADE AREA RETAIL SPENDING BY GENERAL CATEGORY

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

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

Moreover, healthy patterns of spending on categories such as Clothing, Footwear, House & Home, Sporting Goods & Recreation etc. provide a benchmark against which prospective tenant, developer, or investor interests could gauge the opportunity. As mentioned previously, many of the larger retailers are often more inclined to look at power centres such as East Hills, CrossIron Mills and Deerfoot Meadows before considering Chestermere.

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

1. *Grocery & Specialty Foods - $119 Million*
2. *Auto/RV/Motorsport - $108 Million*
3. *Home Electronics and Appliances - $57 Million*
4. *Home Furnishings - $43 Million*
5. *Clothing & Apparel- $42 Million ($53 million including Footwear)*

3.6
SUMMARY & IMPLICATIONS

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

East Hills in Calgary is currently open and developing to full buildout; CrossIron Mills is fully operational and undergoing an expansion. These power centres as well as Deerfoot Meadows include Chestermere in their PTA, and therefore it would be a challenge for the City of Chestermere to compete directly against these nodes.

Chestermere is under-served significantly by retail and represents a significant opportunity for tapping into spending that is leaking out of the community today.

The Retail Trade Area for Chestermere takes into account the reality of competitive influences nearby, and is adjusted accordingly. This includes the realization that residents of Chestermere and the communities to the east and south will favour the convenience and accessibility provided by retail in Chestermere in comparison to traveling further to the Calgary area.

The total Trade Area Demographic Profile illustrates a very strong local Trade Area that will grow from 45,000 in 2016 to approximately 54,000 over the next decade.

Chestermere's strengths lie in its demographics, which are supported by a significant household income well above the regional and provincial averages. Secondly, the Trade Area has a strong and dynamic young family profile who are both mobile in their shopping patterns, yet are increasingly seeking opportunities to spend their money closer to home for more frequent purchases.

Overall, Chestermere represents a $580 Million (2016 estimates) retail market in which categories such as Grocery, Automotive/RV, Electronics & Appliances, House & Home and Fashion represent strong spending segments.

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

For Chestermere to be a successful retail market, it will require the right mix of shops and services tailored appropriately to demand expectations.

Photo credit: Cushing Terrell Architecture Inc. 2016

4.0 retail supply

4.1 INTRODUCTION

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

This section will provide a detailed inventory of the retail centres/nodes and tenants that comprise the current retail market for Chestermere and the surrounding area.

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

The inventory will reflect current as well as proposed or future retail centres/nodes, allowing an understanding of competitive influences and potential tenant opportunities today, and into the near future.

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

4.2 REGIONAL RETAIL MARKET

Referring to **Figure 4.1,** the eastern Calgary region within an approximate 10-minute drive time of Chestermere has three major retail nodes that create competitive alternatives for shopping outflow within Chestermere's Retail Trade Area. In total, these three nodes at full buildout will represent 2.37 million sf of retail space. Also included in the analysis is CrossIron Mills due to its substantial size and trade area.

1. East Hills

East Hills is a shopping centre currently under development, located approximately 7 kilometres (about 7-minute drive) west of Chestermere, and at build-out will have just under 1 million sf of retail and commercial business. Currently Walmart is the anchor tenant, with Bulk Barn, Sleep Country, and a few limited service restaurants comprising the currently opened stores. Costco is currently under construction, with further space to become occupied as development progresses including confirmed tenants such as Sport Chek, Mark's, Shoe Warehouse and speculative tenants such as Canadian Tire, Marshalls and Cineplex.

2. Marlborough Mall

Marlborough Mall offers about 570,000 sf of retail space 14 kilometres (15-minutes) from Chestermere, and features both Walmart and Sears as anchors. Other stores located at this mall include Bluenotes, Le Chateau, and Urban Planet; in total there are approximately 100 stores at Marlborough Mall.

Figure 4.1

CHESTERMERE REGIONAL RETAIL MARKET CONTEXT

3. Sunridge Mall

At 15 kilometres away, Sunridge Mall is another major regional retail node, about a 15-minute drive from Chestermere. H&M, Sport Chek, Real Canadian Superstore, The Bay, and Winners are some of the major tenants, with a variety of other retail shopping options at this 830,000 sf mall.

4. CrossIron Mills

While the previously discussed retail nodes are the three most conveniently accessed shopping areas within Calgary for Chestermere residents, CrossIron Mills is important to examine due to its size and offerings. At 1.2 million sf of enclosed shopping space with 17 large-format anchor stores and over 200 specialty stores, the regional impact of CrossIron Mills affects an extremely large area: trade area density is calculated to be 3.6 million people. Getting to this mall from Chestermere takes around 25 minutes and is approximately 30 kilometres away.

5. Strathmore

Strathmore is a town of over 12,000 people, located around 30 kilometres east of Chestermere. Retail in this community is primarily viewable and accessible from Highway 1, and is dominated by the power centre Ranch Market, which features Walmart, Sobeys, and Totem Building Supplies as anchors. This 331,000 sf retail area also includes Shoppers Drug Mart, Reitmans, Ardene's, Warehouse One, and Lammle's Western Wear and Tack, as well as various banks and dining options.

Also in Strathmore is a Canadian Tire, Mark's, RONA, Peavey Mart and Home Hardware. Furthermore, both Ford and Chevrolet have car dealerships in Strathmore, along with Fountain Tire having an establishment. Being directly east of Chestermere on Highway 1, Strathmore currently provides a potentially less congested option in comparison to Calgary for residents to shop for retail.

4.3 LOCAL RETAIL PROJECTS

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

Figure 4.2 illustrates retail being established in central areas of Chestermere, as well as within currently developed neighbourhoods. Future development of retail includes areas along Highway 1 and 1A, which are advantageous locations for easy regional access.

The following provides brief narratives on the major retail areas in the City of Chestermere that are ready to accommodate potential retailers.

Chestermere Station

Chestermere Station is a neighbourhood shopping centre located at Highway 1A (Chestermere Boulevard) and Windermere Boulevard. It has a total leasable area of 159,352 sf, featuring already established tenants such as Boston Pizza, Browns Social House, Safeway, Shoppers Drug Mart, Starbucks, and Tim Hortons.

Figure 4.2

CITY OF CHESTERMERE LOCAL COMPETITIVE RETAIL

(Source: Cushing Terrell Architecture Inc.)

The Chestermere Station Professional Building is envisioned to have a two-storey addition, which is anticipated to feature over 26,000 sf of street level retail space, and over 26,000 sf of office space.

Chestermere Towne Square

Located just off Highway 1 at the corner of Chestermere Boulevard and E Chestermere Drive, Chestermere Towne Square has restaurants, a gas station, salon services, a post office, a veterinary clinic and flower shop just to name a few of its amenities. Its location makes it viewable from Highway 1, and is accessible for both directions of traffic on this busy route.

Chestermere Plaza

Chestermere Plaza can be found on the central western edge of the city's currently developed land providing convenient access to residents of the surrounding neighbourhoods. Major tenants include a liquor store, physiotherapy, restaurant, pub, and insurance company.

Rainbow Falls Commercial

This commercial area in the Rainbow Falls neighbourhood has a No Frills grocery store as an anchor, as well as North Taphouse, other dining options, a barber shop, a tanning salon and a Mac's convenience store and gas bar among other amenities. Being located on the western edge of currently developed land in Chestermere is advantageous towards this commercial area, due to it being directly adjacent to future development area of the Gateway neighbourhood.

Chestermere Centre (Chestermere Health & Commercial Centre)

Located in the southeast corner of the city, Chestermere Centre's Phase 1 features laboratory services, health services, dental, a Montessori Preschool Academy, and a personal training facility; the only retail option in this phase of development is the Waiting Room Cafe. Phase 2 of this development is expected to take occupancy late 2016 to early 2017, with units from 1,570 sf up to 12,000 sf available, and is planned to expand the retail offerings for the eastern area of Chestermere. Residential housing is already built in the Kinniburgh neighbourhood, with multi-unit residential currently under construction to the north of Chestermere Centre. Furthermore, new development in the directly adjacent neighbourhood, East Acreages, is currently in the planning process. This 342 acre area is proposed to be predominantly residential, incorporating single-detached and multi-unit dwellings, with an expected population of 5,000 - 7,000 residents.

4.4 CITYWIDE RETAIL INVENTORY

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

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

Figure 4.3

REPRESENTATIVE CITY RETAIL IMAGERY

Source: Photos by Cushing Terrell Architecture Inc.)

4

As documented in **Tables 4.1 and 4.2**, the City of Chestermere has an estimated retail floor space of approximately 275,000 sf. This retail floor space is comprised of approximately 109 retail premises that range from Grocery Stores to Restaurants to Personal Services such as Optometrists and Salons.

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

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

A review of Chestermere's retail environment provides numerous indicators as to potential merchandise and tenant opportunities.

The absence of a local presence for numerous retail categories demonstrates the untapped potential for a wide variety of retail in Chestermere. Given the population of the Trade Area which is steadily increasing and has been doing so for some time, the opportunity exists for retailers such as Canadian Tire, Real Canadian Superstore or Home Hardware to enter this market.

Chestermere Station | Image credit: Melcor Developments Ltd.

4.4.1

RETAIL INVENTORY BY NODE

Based on fieldwork and inventory, Chestermere's current retail situation was allocated into three nodes as documented in **Tables 4.1 & 4.2**. Each node was determined based on geographic and spatial factors such as road networks, patterns of residential development or geographic features such as Lake Chestermere. The result was the following nodes totaling an estimated 267,000 sf of retail space:

- CENTRAL 161,507sf
- EAST 13,450 sf
- WEST 91,900 sf

The Central and West nodes comprise the majority of the current retail opportunities in Chestermere. These locations are oriented nearby where development in the City has predominantly occurred, and are located mainly on the western side of Lake Chestermere. The East node is currently limited in retail options, but potential future growth in this area provides the opportunity for expansion.

Table 4.1

RETAIL NODES

(Source: Cushing Terrell Architecture Inc.)

Identified Retail Node (Includes vacant retail spaces)	Total Inventory (sf)	Number of Stores	Average Store Size (sf)
CENTRAL	161,507	50	3,230
EAST	13,450	10	1,345
WEST	91,900	47	1,955
TOTAL	**266,857**	**107**	**2,494**

Table 4.2

RETAIL INVENTORY BY CATEGORY & NODE

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

Merchandise Category	RETAIL AREA (sf)			
	CENTRAL	EAST	WEST	TOTAL (sf)
Grocery & Specialty Foods	53,700	1,700	34,900	**90,300**
Alcohol & Tobacco	6,000	0	10,000	**16,000**
Pharmacy	5,000	0	750	**5,750**
Personal Services	43,475	2,750	11,750	**57,975**
Clothing & Apparel	1,000	0	0	**1,000**
Footwear	0	0	0	**0**
Jewelry & Accessories	0	0	0	**0**
Health & Beauty	5,000	750	3,000	**8,750**
Home Electronics & Appliances	0	0	0	**0**
Home Furnishings & Accessories	0	0	0	**0**
Home Improvement & Gardening	0	0	0	**0**
Books & Multi-Media	0	0	0	**0**
Sporting Goods & Outdoor Recreation	0	0	0	**0**
Toys & Hobbies	0	0	0	**0**
Specialty Retail	7,950	0	5,000	**12,950**
Full Service F&B	20,000	4,000	12,000	**36,000**
Limited Service F&B	17,375	3,250	3,500	**24,125**
Entertainment & Leisure	0	0	0	**0**
VACANT	2,007	1,000	11,000	**14,007**
TOTAL	**161,507**	**13,450**	**91,900**	**266,857**

4.4.2
RETAIL INVENTORY BY CATEGORY

Table 4.3 provides a breakdown of the City's retail inventory by category and node, displaying how current retail in Chestermere is allocated. Generally, similar categories are offered at each node, with the Central node providing the most choice out of the three in terms of options and variety. While day to day needs such as grocery and personal services are located throughout Chestermere, there remains retail gaps within numerous categories where no current stores are offered. This includes Home Improvement & Gardening, Sporting Goods & Outdoor Recreation, as well as Entertainment & Leisure, among others.

Categories of retail were also 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 category void analysis for Chestermere.

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

On a citywide basis, the Top 5 retail categories in terms of overall retail floor space are:

1. *Grocery & Specialty Foods* *90,300 sf*
2. *Personal Services* *57,975 sf*
3. *Full Service F&B* *36,000 sf*
4. *Limited Service F&B* *24,125sf*
5. *Alcohol & Tobacco* *16,000 sf*

Chestermere has little or no retail offerings within the following categories, suggesting they are greatly under-served in the local area:

- Clothing & Apparel
- Footwear
- Jewelry & Accessories
- Home Electronics & Appliances
- Home Furnishings & Accessories
- Home Improvement & Gardening
- Books & Multi-Media
- Sporting Goods & Outdoor Recreation
- Toys & Hobbies
- Entertainment & Leisure
- Auto/RV/Motorsports Dealership

4.5
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 of whether a market is under-retailed or over-retailed.

In most urban markets in Canada and the United States, a typical benchmark for ALL retail space per capita is in the range of 30 sf to 40 sf (Source: International Council of Shopping Centers).

For a comparable market like Chestermere, this figure is more likely to fall in the 20 to 30 sf per capita range given the locational context with the City of Calgary and its competitive retail nodes.

Figure 4.4

CITY OF CHESTERMERE RETAIL INVENTORY FLOORSPACE BY CATEGORY

(Source: Cushing Terrell Architecture Inc.)

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

When applying the retail inventory for the City of Chestermere against the City's population, the resulting per capita ratio is approximately 14.5 sf, which suggests the City is under-retailed and has a current day residual demand from as little as 5 sf to as much as 15 sf per capita above today's estimate or 92,000 sf to 275,000 sf .

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

4.6

SUMMARY & IMPLICATIONS

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

Table 4.3

CITY OF CHESTERMERE RETAIL INVENTORY

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

Merchandise Category	Existing Inventory (SF)	Existing Inventory (%)	% of Number of Stores	Average Store Size
Grocery & Specialty Foods	90,300	33.8%	9.2%	9,030
Alcohol & Tobacco	16,000	6.0%	4.6%	3,200
Pharmacy	5,750	2.2%	1.8%	2,875
Personal Services	57,975	21.7%	25.7%	2,071
Clothing & Apparel	1,000	0.4%	0.9%	1,000
Footwear	0	0.0%	0.0%	-
Jewelry & Accessories	0	0.0%	0.0%	-
Health & Beauty	8,750	3.3%	6.4%	1,250
Home Electronics & Appliances	0	0.0%	0.0%	-
Home Furnishings & Accessories	0	0.0%	0.0%	-
Home Improvement & Gardening	0	0.0%	0.0%	-
Books & Multi-Media	0	0.0%	0.0%	-
Sporting Goods & Outdoor Recreation	0	0.0%	0.0%	-
Toys & Hobbies	0	0.0%	0.0%	-
Specialty Retail	12,950	4.9%	10.1%	1,177
Full Service F&B	36,000	13.5%	11.9%	2,769
Limited Service F&B	24,125	9.0%	16.5%	1,340
Entertainment & Leisure	0	0.0%	0.0%	-
VACANT	14,007	5.2%	12.8%	1,001
TOTAL	**266,857**	**100.0%**	**100%**	**2,448**

Figure 4.5

CITY OF CHESTERMERE RETAIL INVENTORY BY CATEGORY & NUMBER OF STORES

(Source: Cushing Terrell Architecture Inc.)

4

The City of Chestermere has an estimated retail floor space of approximately 267,000 sf.

When applying the retail inventory for the City of Chestermere against the City's population, the resulting per capita ratio is approximately 15 sf, which suggests the City is under-retailed and has a current day residual demand from as little as 5 sf to as much as 15 sf per capita or 92,000 sf to 275,000 sf.

The biggest threat to Chestermere's retail outlook, particularly from a larger retail perspective will come from the newest developing project at East Hills.

That said, there is sufficient growth forecast in Chestermere over the next decade to suggest that a retail development closer to the City has the true potential to attract competing retailers who may not wish to locate at East Hills, but for whom the current voids in Chestermere combined with its Trade Area attributes represent an ideal fit.

The City's current retail inventory clearly illustrates an absence of a local presence for numerous retail categories and demonstrates the untapped potential for a wide variety of retail in the community.

Given the population of the Trade Area which is steadily increasing and has been doing so for some time, the opportunity exists in particular for retailers such as Canadian Tire, Real Canadian Superstore or Home Hardware to enter this market. At a minimum the Chestermere Gateway ASP provides a competitive alternative to East Hills for retailers looking to locate and tap into the Chestermere Trade Area.

On the basis of the City's current retail inventory, there is clearly a correlation between the City of Chestermere's evolution from a town to a city whereby retail opportunities will follow demand. Accordingly, the City of Chestermere, with its population approaching 20,000 residents, represents one of the best untapped retail opportunities in the entire Calgary region.

The destinational aspect of Chestermere, particularly in the summer months supports a competitive framework for Food & Beverage activity as noted by the amount of Full and Limited Service Restaurants in the community.

CHESTERMERE

PUBLIC NOTICE

Proposed
Master Area Structure Plan

Address and Legal Description:

Section 21-24-28-W4M

Section 16-24-28-W4M

Section 9-24-28-W4M

Section 4-24-28-W4M (excluding the portion of SE quarter section containing the Paradise Meadow acreage subdivision)

Portion of NW and NE 3-24-28-W4M

Existing Land Use District:
UT - Urban Transition
LLR - Large Lot Rural Residential

Proposed for:
Future Residential, Public Uses, Commercial, Light Industrial, Business Park

Site Area:
970.90ha (2399.15 acres)

Plan Area

YOU ARE HERE

KEY PLAN

This application has received First Reading by Council on November 18, 2013 and will be brought forward for Public Hearing on **January 20**, 2014.

A **Public Open House** will be held on **Thursday December 5, 2013** @ the ***Chestermere Recreation Centre*** from 5:30-8:00pm in Meeting Room #2.

Persons wishing for more information should contact Heather Kauer
Town of Chestermere Development Services Department,
105 Marina Drive, Chestermere, Alberta, T1X 1V7 or telephone (403) 207-7045
or by fax (403)569-0512

5.0 retail demand

5.1 INTRODUCTION

The following section will assess the amount of supportable floor space in the City of Chestermere as justified by the Trade Area it serves. After determining the supportable and residual floor space (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 FLOOR SPACE DEMAND BY TRADE AREA SEGMENT

Tables 5.1 to 5.4 depict the retail floor space demand estimates that are projected to come from Chestermere's respective retail Trade Areas. This measure of retail demand is used to further rationalize the current amount of inventory in the City and further highlight where particular areas of deficiency or opportunity may lie as it relates to the overall retail offering in the City.

Moreover, it provides a benchmark against which future goals could be set for sales inflow and retention.

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

Once the estimated expenditure for each Trade Area is calculated, an estimated market share is applied to each category.

This market share reflects an estimate on how much retail sales the City of Chestermere is currently garnering from each respective Trade Area. Market Share estimates are derived in part from the results of the Consumer Intercept Survey which asked respondents what percentage of their retail spending on a specific category was "inside Chestermere" or "outside Chestermere", as well as from the current retail inventory itself in the City.

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

City of Chestermere Supply - Demand

Starting with **Table 5.1**, the City of Chestermere as a stand-alone market is quantified to determine, based on expenditure and market shares, just how much retail space the City's almost 19,000 residents could reasonably justify, not taking into account inflow of any kind.

Firstly, **Table 5.1** reveals that based on the City's current occupied retail inventory of approximately just under 200,000 sf (195,155 sf), the City's residents are only garnering a retained market share of 31%.

The remaining nearly 70% of Chestermere resident spending is considered outflow and spent elsewhere in the City of Calgary, Rocky View County, Strathmore, or elsewhere.

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

TABLE 5.1

CITY OF CHESTERMERE MARKET SHARE & FLOOR SPACE DEMAND

Retail Spending by Merchandise Category	2016			
	City of Chestermere Retail Sales Productivity ($psf)	Retained Market Share	Retained Sales $	Floorspace Demand (sf)
Grocery & Specialty Foods	$500	63%	$31,945,022	63,890
Pharmacy	$500	72%	$2,883,259	5,767
Alcohol & Tobacco	$500	65%	$5,492,468	10,985
Personal Services	$150	46%	$4,689,561	31,264
Clothing & Apparel	$250	1%	$169,384	678
Footwear	$275	1%	$36,215	132
Jewelry & Accessories	$450	9%	$257,470	572
Health & Beauty	$375	51%	$2,547,549	6,793
Home Furnishings & Accessories	$275	1%	$258,240	939
Home & Personal Electronics & Appliances	$400	1%	$361,624	904
Home Improvement & Gardening	$200	3%	$151,979	760
Books & Multimedia	$200	74%	$2,696,394	13,482
Sporting Goods & Recreation	$225	0%	$0	0
Toys & Hobbies	$225	5%	$145,539	647
Specialty Retail	$250	27%	$1,646,927	6,588
Full Service Restaurants	$400	39%	$3,339,027	8,348
Limited Service Restaurants	$425	56%	$3,472,962	8,172
Entertainment & Leisure	$175	0%	$38,626	221
Auto Parts & Accessories	$275	0%	$14,381	52
Auto/RV/Motorsports Dealerships	$400	32%	$13,999,920	35,000
TOTAL RETAIL CATEGORIES ONLY	**$380**	**31%**	**$74,146,546**	**195,192**

TABLE 5.2

PRIMARY TRADE AREA MARKET SHARE & FLOOR SPACE DEMAND

Retail Spending by Merchandise Category	2016			
	PTA Incl Chestermere Retail Sales Productivity ($psf)	Inflow & Retained Market Share	Inflow & Retained Sales $	Floorspace Demand (sf)
Grocery & Specialty Foods	$500	63%	$40,592,426	81,185
Pharmacy	$500	72%	$3,860,721	7,721
Alcohol & Tobacco	$500	65%	$7,309,078	14,618
Personal Services	$150	46%	$5,916,623	39,444
Clothing & Apparel	$250	1%	$217,067	868
Footwear	$275	1%	$46,414	169
Jewelry & Accessories	$450	9%	$346,660	770
Health & Beauty	$375	51%	$3,199,178	8,531
Home Furnishings & Accessories	$275	1%	$305,685	1,112
Home & Personal Electronics & Appliances	$400	1%	$442,119	1,105
Home Improvement & Gardening	$200	3%	$195,425	977
Books & Multimedia	$200	74%	$3,523,742	17,619
Sporting Goods & Recreation	$225	0%	$0	0
Toys & Hobbies	$225	5%	$178,461	793
Specialty Retail	$250	27%	$2,072,148	8,289
Full Service Restaurants	$400	39%	$4,147,711	10,369
Limited Service Restaurants	$425	56%	$4,314,083	10,151
Entertainment & Leisure	$175	0%	$49,443	283
Auto Parts & Accessories	$275	0%	$18,059	66
Auto/RV/Motorsports Dealerships	$400	32%	$17,208,753	43,022
TOTAL RETAIL CATEGORIES ONLY	**$380**	**31%**	**$93,943,796**	**247,092**

Much of this decision is based on the relative proximity of Calgary and its major nodes documented previously. This trend will become even more evident as East Hills enters the market, within a 10-minute drive time of the City of Chestermere.

As the City of Chestermere grows, and as more residents want and need more shops in their own community, the City of Chestermere can and should strive to increase its market share of resident spending.

The following illustrates the incremental benefits in residual demand that could result from an increase in retained market share of resident spending, based on the current market:

40% retained market share = additional 58,000 sf

50% retained market share = additional 122,000 sf

60% retained market share = additional 185,000 sf

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

Table 5.2 illustrates the combined demand resulting from the Total PTA, which includes the City of Chestermere. The figures reveal current demand for approximately 247,000 sf of retail at a combined market share of approximately 31% (using the same rates as for the City).

In the above scenario and in **Table 5.2**, the City's current retained market shares are applied to the Total PTA to provide a snapshot of the current demand that the Chestermere market could support as of today's population and at the same market shares.

Accordingly, it is estimated that at a minimum the city is at a relative balance point at current conditions whereby PTA demand at +/- 250,000 sf is matched by the current inventory at an estimated +/- 265,000 sf

To account for spending inflow originating outside of the City of Chestermere, Cushing Terrell also quantified the Secondary Trade Areas (STAs).

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.

With an expected increase in the amount, diversity, and quality of retail offering in Chestermere, it is not difficult to comprehend an increase to these market shares over the next decade.

Secondary Trade Area East Supply - Demand

Each of the STAs is much less populated than the PTA and as such, the amount of attributable demand is lower. This is further emphasized since the STA East includes Strathmore, which has a roster of tenants that Chestermere doesn't have, while categories Strathmore may not have, similarly Chestermere does not have.

For these STAs, demand is in the form of Convenience and Food & Beverage, likely to be garnered in the summer months when the lake provides for summer activities, and spending can be more easily captured.

Table 5.3 reveals the demand for floor space in the City of Chestermere attributable to residents in the STA East at approximately 27,000 sf: a current market share of 5%.

Secondary Trade Area South Supply - Demand

Table 5.4 reveals the demand for floor space in the City of Chestermere attributable to residents in the STA South, including Langdon at just over 21,000 sf at a current market share of only 8%.

TABLE 5.3

SECONDARY TRADE AREA EAST MARKET SHARE & FLOOR SPACE DEMAND

Retail Spending by Merchandise Category	2016			
	STA East Retail Sales Productivity ($psf)	Inflow Market Share	Inflow Sales $	Floorspace Demand (sf)
Grocery & Specialty Foods	$500	15%	$5,816,204	11,632
Pharmacy	$500	10%	$450,165	900
Alcohol & Tobacco	$500	5%	$507,220	1,014
Personal Services	$150	10%	$836,429	5,576
Clothing & Apparel	$250	0%	$0	0
Footwear	$275	0%	$0	0
Jewelry & Accessories	$450	0%	$0	0
Health & Beauty	$375	0%	$0	0
Home Furnishings & Accessories	$275	0%	$0	0
Home & Personal Electronics & Appliances	$400	0%	$0	0
Home Improvement & Gardening	$200	0%	$0	0
Books & Multimedia	$200	0%	$0	0
Sporting Goods & Recreation	$225	0%	$0	0
Toys & Hobbies	$225	0%	$0	0
Specialty Retail	$250	10%	$569,411	2,278
Full Service Restaurants	$400	20%	$1,273,380	3,183
Limited Service Restaurants	$425	20%	$922,103	2,170
Entertainment & Leisure	$175	0%	$0	0
Auto Parts & Accessories	$275	0%	$0	0
Auto/RV/Motorsports Dealerships	$400	0%	$0	0
TOTAL RETAIL CATEGORIES ONLY	**$388**	**5%**	**$10,374,913**	**26,754**

TABLE 5.4

SECONDARY TRADE AREA SOUTH MARKET SHARE & FLOOR SPACE DEMAND

Retail Spending by Merchandise Category	2016			
	STA South Retail Sales Productivity ($psf)	Inflow Market Share	Inflow Sales $	Floorspace Demand (sf)
Grocery & Specialty Foods	$500	25%	$3,952,710	7,905
Pharmacy	$500	25%	$375,963	752
Alcohol & Tobacco	$500	25%	$1,128,400	2,257
Personal Services	$150	25%	$1,001,550	6,677
Clothing & Apparel	$250	0%	$0	0
Footwear	$275	0%	$0	0
Jewelry & Accessories	$450	0%	$0	0
Health & Beauty	$375	0%	$0	0
Home Furnishings & Accessories	$275	0%	$0	0
Home & Personal Electronics & Appliances	$400	0%	$0	0
Home Improvement & Gardening	$200	0%	$0	0
Books & Multimedia	$200	0%	$0	0
Sporting Goods & Recreation	$225	0%	$0	0
Toys & Hobbies	$225	0%	$0	0
Specialty Retail	$250	10%	$273,669	1,095
Full Service Restaurants	$400	20%	$562,107	1,405
Limited Service Restaurants	$425	20%	$407,043	958
Entertainment & Leisure	$175	0%	$0	0
Auto Parts & Accessories	$275	0%	$0	0
Auto/RV/Motorsports Dealerships	$400	0%	$0	0
TOTAL RETAIL CATEGORIES ONLY	**$366**	**8%**	**$7,701,442**	**21,049**

Total Trade Area Supply - Demand

Table 5.5 summarizes the estimated present day total demand for floor space in the City of Chestermere attributable to residents of the PTA and STAs, at approximately 300,000 sf (294,895 sf).

When compared against the current city's occupied retail inventory or supply at only 252,850 sf, (~266,857 sf including vacant space) the difference between demand and supply equates to almost 42,045 sf (28,038 sf) of retail space. In other words, the City today could support at its current low levels of inflow and retained market shares approximately 50,000 sf of retail space. This doesn't factor into the equation future growth, nor new retail that could noticeably increase the current levels of market share.

As with the PTA, the following illustrates the incremental benefits in residual demand that could result from an increase in retained market share of resident spending, based on the current market, of which the Chestermere Total Trade Area is only garnering almost 20% (19.3) of total spending:

30% market share = additional 464,000 sf

40% market share = additional 618,000 sf

50% market share = additional 773,000 sf

If one factors into the equation forecasted population growth in the total trade area of approximately 9,200 over the next decade to 2026 (the majority of which will be in the City of Chestermere), then estimated future floor space demand above and beyond residual demand could grow by approximately 180,000 to 230,000 sf (based on 20 to 25 sf per capita).

5.3

RETAIL GAP ANALYSIS QUANTIFICATION

The previous analysis evaluated the supply vs. demand in terms of retail floor space only. This next step involves quantifying the supply vs. demand in terms of retail sales performance and spending. The process for calculating the retail surplus/inflow involved estimating the current annual retail sales for each respective merchandise category in Chestermere.

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

TABLE 5.5

TOTAL TRADE AREA RESIDUAL DEMAND

Retail Spending by Merchandise Category	2016		
	Total Floorspace Demand (sf)	Current City Retail Inventory (sf)	Total Residual Demand (sf)
Grocery & Specialty Foods	100,723	90,300	10,423
Pharmacy	9,374	5,750	3,624
Alcohol & Tobacco	17,889	16,000	1,889
Personal Services	51,697	57,975	-6,278
Clothing & Apparel	868	1,000	-132
Footwear	169	0	169
Jewelry & Accessories	770	0	770
Health & Beauty	8,531	8,750	-219
Home Furnishings & Accessories	1,112	0	1,112
Home & Personal Electronics & Appliances	1,105	0	1,105
Home Improvement & Gardening	977	0	977
Books & Multimedia	17,619	0	17,619
Sporting Goods & Recreation	0	0	-0
Toys & Hobbies	793	0	793
Specialty Retail	11,661	12,950	-1,289
Full Service Restaurants	14,958	36,000	-21,042
Limited Service Restaurants	13,278	24,125	-10,847
Entertainment & Leisure	283	0	283
Auto Parts & Accessories	66	0	66
Auto/RV/Motorsports Dealerships	43,022	0	43,022
TOTAL RETAIL CATEGORIES ONLY	**294,895**	**252,850**	**42,045**

FIGURE 5.1

CITY OF CHESTERMERE RETAIL SPENDING SUPPLY AND DEMAND

Table 5.6 and Figure 5.1 illustrate the Retail Gap Analysis on a category-by-category basis for the City of Chestermere.

Given the rapid rate of population growth over a short period of time in Chestermere, it is not surprising to see retail sales leakage (outflow) in every single category, and is a further validation of the low rates of market share documented previously.

5.4 RETAIL INFLOW & OUTFLOW

Cushing Terrell utilized a methodology of comparing supply and demand as generated by the retail spending patterns of the Trade Area residents. This comparison of supply and demand results in a measure of Inflow or Outflow.

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

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

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

Table 5.6 demonstrates the spectrum of supply and demand, ranging from +100 (total inflow) to -100 (total outflow). This table demonstrates that in every Merchandise Category for Chestermere, there is outflow or leakage being experienced.

In total, cross-referencing the City's retail spending against the actual retail sales estimated for its current inventory yields an estimated total sales outflow of $95 million dollars.

It is common for many markets, particularly those closer to major metropolitan areas to have categories where sales outflow occurs, however Chestermere's levels of outflow are quite substantial and widespread. This includes categories where leakage is estimated at 100% since no retail of this type is offered in Chestermere. Nine (9) out of eighteen (18) Merchandise Categories have a -100 factor, meaning total outflow of the category: Home Furnishings & Accessories is a market sector which has an estimated expenditure potential of nearly $44 million, and all of these purchases are currently being made outside of Chestermere.

This large outflow factor presents a significant opportunity for retail expansion in Chestermere driven by retaining a larger market share of its own City and overall PTA retail spending.

While certain categories exhibiting outflow are the types which people would be willing to drive 30 - 45 minutes for, the widespread absence of local retail options is still evidence in favour of businesses locating in Chestermere.

TABLE 5.6

RETAIL INFLOW / OUTFLOW ESTIMATES (Excluding Auto Parts and Auto/RV Dealerships)

Merchandise Category	Existing Inventory (SF)	Est. Current Annual Sales by Category (SUPPLY)	Est. Chestermere Expenditure Potential 2016 (DEMAND)	Chestermere Outflow / Inflow Estimates
Grocery & Specialty Foods	90,300	$50,575,000	$50,900,289	-$325,289
Alcohol & Tobacco	16,000	$8,125,000	$4,022,965	$4,102,035
Pharmacy	5,750	$3,406,250	$8,436,970	-$5,030,720
Personal Services	57,975	$8,490,000	$10,137,399	-$1,647,399
Clothing & Apparel	1,000	$250,000	$17,644,170	-$17,394,170
Footwear	0	$0	$4,893,917	-$4,893,917
Jewelry & Accessories	0	$0	$2,873,547	-$2,873,547
Health & Beauty	8,750	$3,210,938	$4,965,015	-$1,754,077
Home Electronics & Appliances	0	$0	$17,448,650	-$17,448,650
Home Furnishings & Accessories	0	$0	$24,434,035	-$24,434,035
Home Improvement & Gardening	0	$0	$5,936,688	-$5,936,688
Books & Multi-Media	0	$0	$3,643,776	-$3,643,776
Sporting Goods & Outdoor Recreation	0	$0	$4,230,335	-$4,230,335
Toys & Hobbies	0	$0	$2,766,900	-$2,766,900
Specialty Retail	12,950	$3,050,000	$6,191,456	-$3,141,456
Full Service F&B	36,000	$12,200,000	$8,570,398	$3,629,602
Limited Service F&B	24,125	$9,817,500	$6,206,150	$3,611,350
Entertainment & Leisure	0	$0	$10,439,566	-$10,439,566
VACANT	14,007			
TOTAL	**266,857**	**$99,124,688**	**$193,742,226**	**-$94,617,538**

Factoring in the above average incomes of residents in the entire Trade Area, more local shopping opportunities would provide convenience and accessibility for the wants and needs of these residents.

In terms of inflow, the destinational aspect of Chestermere as well as its favourable remoteness from the existing urban boundary enables the City to have relatively competitive and strong representation by restaurants which leads to an estimated inflow of dollars in the magnitude of over $7 million.

Discussions with restaurateurs in in the local area suggest that competition is strong and while there is an inflow of sales dollars the productivity may not be as high as other comparable locations. As a result, future restaurant opportunities are not likley to be aggresive in the near term, but as the growth continues, opportunities could be pursued.

5.5 FUTURE DEMAND OPPORTUNITY

The previous approaches to illustrating and documenting demand and inflow/outflow portray a current snapshot. However, this rear view mirror approach should be viewed with an eye to the future. Accordingly, **Table 5.7** illustrates a scenario for future growth in the City of Chestermere that applies "target" market shares of the Total Trade Area retail spending (at constant dollars).

In this scenario, a total Market Share of trade area spending that increases to 30% could result in a total floorspace demand of just over 480,000 sf (481,702 sf) or almost 229,000 sf of new retail space in the City above the current inventory.

Within that target market share range, categories such as Clothing & Footwear could reasonably grow to approximately 20,000 sf at a 10% market share.

Home Improvement, which is a sought after category could comprise 25,000 sf at a more aggressive market share of 35%. But given the limited inventory in Chestermere combined with the nearest location of a competitor suggests this could be feasible to achieve.

As mentioned previously, Food & Beverage in Chestermere is indicative of a tourist inflow market and as such even target market shares of 70% of total trade area spending for full and quick service restaurants is considered high and would not necessarily correspond to new demand. On this basis, quick and full service restaurants should be cautiously approached for new space.

5.6 SUMMARY & IMPLICATIONS

Based on the City's current retail inventory of just under 267,000 sf, the City's residents are garnering a retained market share of approximately 31%.

The remaining nearly 70% of Chestermere resident spending is considered outflow and spent elsewhere in either the City of Calgary, Rocky View County, Strathmore, or elsewhere.

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

These findings are further validated by the Consumer Intercept Survey results in the forthcoming Section 6.0.

TABLE 5.7

RETAIL INFLOW / OUTFLOW ESTIMATES (Excluding Auto Parts and Auto/RV Dealerships)

Retail Spending by Merchandise Category	Retail Sales Productivity ($psf)	Target Market Share	Potential Sales $	Floorspace Demand (sf)	Existing City Inventory	Potential New Floorspace Demand
Grocery & Specialty Foods	$500	50%	$59,632,176	119,264	90,300	28,964
Pharmacy	$500	55%	$6,265,769	12,532	5,750	6,782
Alcohol & Tobacco	$500	50%	$12,942,736	25,885	16,000	9,885
Personal Services	$150	40%	$10,064,169	67,094	57,975	9,119
Clothing & Apparel	$250	10%	$4,236,915	16,948	1,000	15,948
Footwear	$275	10%	$1,194,883	4,345	0	4,345
Jewelry & Accessories	$450	10%	$799,573	1,777	0	1,777
Health & Beauty	$375	45%	$5,200,315	13,868	8,750	5,118
Home Furnishings & Accessories	$275	10%	$4,344,489	15,798	0	15,798
Home & Personal Electronics & Appliances	$400	5%	$2,847,110	7,118	0	7,118
Home Improvement & Gardening	$200	35%	$4,932,511	24,663	0	24,663
Books & Multimedia	$200	5%	$437,969	2,190	0	2,190
Sporting Goods & Recreation	$225	20%	$1,761,458	7,829	0	7,829
Toys & Hobbies	$225	15%	$953,036	4,236	0	4,236
Specialty Retail	$250	25%	$4,055,206	16,221	12,950	3,271
Full Service Restaurants	$400	70%	$13,876,458	34,691	36,000	-1,309
Limited Service Restaurants	$425	70%	$10,048,470	23,643	24,125	-482
Entertainment & Leisure	$175	5%	$1,258,648	7,192	0	7,192
Auto Parts & Accessories	$275	25%	$2,366,830	8,607	0	8,607
Auto/RV/Motorsports Dealerships	$400	25%	$27,120,992	67,802	0	67,802
TOTAL RETAIL CATEGORIES ONLY	**$362**	**30%**	**$174,339,712**	**481,702**	**252,850**	**228,852**

If the City were able to increase its retained market share of resident spending, then corresponding demand would further increase at the following levels:

40% retained market share = additional 58,000 sf
50% retained market share = additional 122,000 sf
60% retained market share = additional 185,000 sf

These figures only represent the amount of space as of today. However, when factoring into the equation forecasted population growth in the Total Trade Area of approximately 9,200 over the next decade to 2026 (the majority of which will be in the City of Chestermere), then estimated future floorspace demand above and beyond residual demand could grow by approximately 180,000 to 230,000 sf (based on 20 to 25 sf per capita).

Cross-referencing the City's retail spending against the actual retail sales estimated for its current inventory yields an estimated total sales outflow of $95 million dollars (excluding Auto Parts & Auto Dealerships). When including Auto Parts & Auto Dealerships, the outflow increases to $141.6 million).

When factoring future growth against the current residual demand, the forecasts suggest the City should focus its retail tenant recruitment strategy on specific tenants and merchandise categories that match Chestermere's strong spending profile and the noticeable gaps in the market, while also taking into account the competitive nature of projects such as East Hills. Examples of target categories include Home Improvement, Sporting Goods, House & Home and General Merchandise.

Regardless of whether it is per capita or a market share methodology, Chestermere's demand could grow from an estimated 50,000 sf today to a more progressive range of 250,000 sf over the next 10 years, subject to tenant realities, population growth, deeper trade area penetration and economic conditions.

Home Improvement is a sought after category in the community and would require more aggressive market shares to validate a larger footprint store, however the spending is strong in this category and the competition is very limited and underserved in Chestermere, making this a very targeted option.

Similarly, Restaurants are a very competitive category in Chestermere and any new restaurant additions should be very targeted to the type of restaurant and food offering, so as to not impact existing businesses.

Chestermere's current marke profile of sales and outflow/inflow resembles in some respects that of a tourist market whereby categories such as restaurants have a high market share and exhibit strong inflow sales dollars. This is likely attributable to the summer tourist volume generated by the lake activities. But as mentioned, caution should be acknowledged that the current inventory of restaurants is considered saturated and competitive, and could pose challenges for new entrants and existing businesses unless those new businesses provide a type of offering not currently in the market or desired by residents (e.g. Greek, Italian etc.).

Growth is overall better off by increasing the existing trade area penetration rather than trying to increase the boundaries of the trade area.

FIGURE 6.1

CONSUMER SURVEY RESPONSE QUESTIONNAIRE

CITY OF CHESTERMERE INTERCEPT STUDY – KEYFAX MARKET RESEARCH (2016)

Hello, my name is _____ of Keyfax a marketing research company. Today we are conducting a survey on shopping with residents in your area. An important component of the survey is to find out what types of retail stores and restaurants are currently missing in the City of Chestermere. If you will please take the time and answer our survey we have a gift card for you.

Q1. Are you 17 years of age or younger? **Yes.....End Interview** **QUESTIONNAIRE #** (_____) [1-3]

RECORD LOCATION:

CHESTERMERE STATION...1 CHESTERMERE REC CENTRE ...2 CHESTERMERE BUSINESS PARK (No Frills)...3 ..... ( ) [4]

Where do you presently reside? Chestermere **1** Conrich **2** Langdon **3** City of Calgary **4**
Other Rocky

1a. At which one shopping area/center do yo
pharmacy, and personal services (Hair sal
Chestermere Station ...**1** No Frills...**2** Ea
Sunridge Mall (RCSS)...**6** Other ...**7** (Specif

1b. Approximately how much do you normall

1c. What are your main reasons for shoppin
_____
_____
_____

2a. **Excluding your grocery shopping**, at w
"comparison" retail items such as clothir
Chestermere Station ...**1** Cross Iron Mills...
Sunridge Mall (RCSS)...**6** Chinook SC...**7**
Other ...**10** (Specify Name & City: _____

2b. Approximately how much do you normall

2c. What are your main reasons for shoppin
_____
_____
_____

Q3a,b,c,d To Q22a,b,c,d READ QUESTIONS A,B,C,D
CHESTERMERE & 'C' ON-LINE – 'A' +'B' + 'C' WILL
DON'T KNOW =BLANK NONE=0 FOR A,B, & C

a,b,c) In the past 3 months, what % out of a
Chestermere and **On-Line**: **ROTATE C**

d) On a scale of **1-10**, with **1 being very uni**
addition of the following to the City of Che
DON'T KNOW=0 ROTATE QUESTION ORDER

3. Purchase grocery/specialty food items? .....
4. Purchase pharmaceutical items? .....
5. Purchase alcohol/tobacco items? .....
6. Purchase & utilize personal services? .....
(Hair salon, child care, drycleaner, travel agency, etc.)
7. Purchase clothing and apparel?.....
(Men's, Women's, Children's)
8. Purchase footwear?.....
(Men's, Women's, Children's)
9. Purchase jewelry & accessory items? .....
(Watches, headwear, eyewear, etc.)
10. Purchase health & beauty items? .....
11. Purchase home furnishings/appliances? .....
(Couches, tables, lamps, toasters, etc.)
12. Purchase home & personal electronics?.....
(Cameras, iPods, mobile phones, computers, etc.)
13. Purchase Home Improvement & Garden items
(Flooring, cabinets, hardware, gardening, etc.)

	a) INSIDE CHESTERMERE	b) OUTSIDE CHESTERMERE	c) ON-LINE	d) IMPORTANCE RATING
14. Purchase books/music/DVDs?	(_____%)	(_____%)	(____%)= 100%	Rating: (_____) [153-163]
15. Purchase sporting goods?	(_____%)	(_____%)	(____%)= 100%	Rating: (_____) [164-174]
16. Purchase toys/hobbies/crafts?	(_____%)	(_____%)	(____%)= 100%	Rating: (_____) [175-185]
17. Purchase specialty retail items? ..... (Gifts, antiques, pet supplies, office supplies, etc.)	(_____%)	(_____%)	(____%)= 100%	Rating: (_____) [186-196]
18. Eat out at full service restaurants? ..... (Keg, Brown's, Cactus Club, Original Joe's, etc.)	(_____%)	(_____%)	(____%)= 100%	Rating: (_____) [197-207]
19. Eat out at limited service restaurants/cafes? (Subway, Tim Horton's, Starbuck's, McDonald's, etc.)	(_____%)	(_____%)	(____%)= 100%	Rating: (_____) [208-218]
20. Purchase & experience entertainment? ..... (Movies, Night Club, Pool Hall, Bowling, Sports Bar, Live Theatre, Concerts, Laser Tag, etc.)	(_____%)	(_____%)	(____%)= 100%	Rating: (_____) [219-229]
21. Purchase automotive/recreational vehicles? ... (Cars, trucks, motorbikes, RVs, ATVs, snowmobiles, boats, etc.)	(_____%)	(_____%)	(____%)= 100%	Rating: (_____) [230-240]
22. Purchase automotive parts & services? ..... (Mufflers, oil changes, body shop, etc.)	(_____%)	(_____%)	(____%)= 100%	Rating: (_____) [241-251]

23. What do you **LIKE** most about the shopping opportunities presently available in the City of Chestermere?
PROBE _____
_____
_____
_____ ( ) ( ) ( ) [252-257]

24. What do you **DISLIKE** most about the shopping opportunities presently available in the City of Chestermere?
PROBE _____
_____
_____
_____ ( ) ( ) ( ) [258-263]

25. What new types of stores, services and/or restaurants would increase your visits and spending in the City of Chestermere?
PROBE – MULTIPLE RESPONSE – PLEASE LIST STORE TYPES AND/OR SPECIFIC STORE NAMES
_____
_____
_____
_____
_____ ( ) ( ) ( ) ( ) ( ) ( ) [264-273]

DEMOGRAPHICS

D1. How many people, including yourself, live in your household?..... **# in Household:** [_____] [274-275]
D2. .... And how many are children under 18 years of age?..... **# Under 18 years:** [_____] [276-277]

D3. What is your present age? **AIDED**
18-24.....**1** 25-34.....**2** 35-44.....**3** 45-54.....**4** 55-64.....**5** 65-74.....**6** 75+.....**7** Refused.....**0** ..... ( ) [278]

D4. Which of the following categories comes closest to your household's total annual income, including yourself, before taxes and other types of deductions? **AIDED** <$15,000.....**1** $15,000-$24,999.....**2** $25,000-$34,999.....**3** $35,000-$44,999.....**4** $45,000-$54,999.....**5** $55,000-$64,999...**6** $65,000-$74,999...**7** $75,000-$99,999...**8** $100,000-$124,999.....**9** $125,000+.....**10** Refused.....**0** ..... ( ) [279-280]

D5. Gender of Respondent: Male.....**1** Female.....**2** ..... ( ) [281]

D6. **WHAT IS YOUR CURRENT POSTAL CODE?:** ___ ___ ___ ___ ___ ___ ..... [282-287]

Interview: Date:_____ **Day:** _____ ..... ( ) [288]
RECORD TIME OF DAY: MORNING.....1 AFTERNOON.....2 EVENING.....3 ..... ( ) [289]

THANK RESPONDENT; HAVE THEM SIGN FOR THE GIFT CARD; GIVE THEM THEIR GIFT CARD

6.0 consumer 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 Chestermere and the surrounding communities were interviewed at random.

Respondents were interviewed at strategic locations in the community (Chestermere Station, Chestermere Regional Recreation Centre, and Chestermere Business Park) to determine their preferences for retailers and merchandise categories/store types in Chestermere. 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 participated in the survey, providing a sample size which ensured the study was statistically valid and had 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 6.1**, while the complete Consumer Intercept Survey results are provided in **Appendix C.**

6.2 RESPONDENT RESIDENCE

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

Given that the surveys were conducted in April, it was deemed suitable to choose outdoor locations due to favourable weather conditions; locations in an indoor environment would otherwise be sought during inclement weather.

An important component to determining and validating the Retail Market & Gap Analysis is ensuring that a representative sample of the trade area is interviewed. **Figure 6.2** illustrates the breakdown of Respondent residences for the Consumer Intercept Survey, revealing 67% of respondents currently live in Chestermere, with 18% residing in Calgary, and 8% in Rocky View County. The remaining respondents live in surrounding Hamlets and other areas.

Furthermore, **Figures 6.3** illustrates in a heat map format the density by Forward Sortation Area (FSA is the first 3 digits of a postal code) from which Survey Respondents originated.

Figure 6.3 depicts a somewhat consistent pattern with the Retail Trade Area documented in **Figure 2.1**, in which the majority of patronage is sourced from the City and surrounding hamlets, with an area expanding eastwards into Rocky View County and further into Wheatland County. The Consumer Survey does have some representation of residents from across the City of Calgary, but for whom Chestermere is likely a targeted visit and not a destination retail visit. This respondent outcome is further surmised given the recent land annexations which join the boundaries of both cities only several kilometres away from current retail options in Chestermere.

FIGURE 6.2

CONSUMER SURVEY RESPONDENTS RESIDENCE OF ORIGIN

FIGURE 6.3

CONSUMER INTERCEPT SURVEY RESPONDENT "HEAT MAP" BY POSTAL CODE

(forward sortation area e.g. T1X)

6.3 PREFERRED SHOPPING LOCATIONS

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

- What is your primary shopping centre for convenience goods?
- What is your primary shopping centre for comparison goods?
- How much do you spend in one month at these shopping centres?
- What are your main reasons for shopping at these shopping centres?
- What do you like most about the shopping opportunities in Chestermere?
- What do you dislike most about the shopping opportunities in Chestermere?

Figures 6.4 to 6.14 identify the respondents reasons for choosing where they shop, revealing preferences towards locations and the decision making factors behind such choices. The results also yield 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 6.4 and 6.5 indicate that the No Frills store in Chestermere is the main location for consumers to shop for convenience necessities such as groceries. The primary reason for this popular choice is revealed to be due to the prices and the relative proximity to the respondent's home, as well as carrying the specific brands and items that are desired. An interesting aspect of respondents shopping habits is the "other" category, which is the second highest Primary Convenience shopping centre identified by the survey.

This strongly points towards respondents potentially having a preferred shopping node that wasn't covered by the survey options. The Calgary region is large and features many options for the Primary Convenience shopping category; if respondents are working in distant areas from Chestermere, they may likely do their shopping closer to work.

Chestermere Station which has a Safeway and Sobeys Liquor, and East Calgary Costco, served as substantial draws for Primary Convenience shopping with 37 and 28 respondents respectively choosing these as their primary shopping node.

Numerous respondents (17) indicated not having one particular store or node where they go for this type of retail. One way of interpreting this data is that these preferences could be defined by factors such as where other errands are variously situated, or where the best sale prices on primary goods are located, etc.

Overwhelmingly, people choose to shop at a Primary Convenience shopping centre for the prices and proximity to their residence, while the selection of items/brands also ranks as important to consumers.

Primary Comparison Shopping Centre

Figures 6.6 and 6.7 illustrate that Sunridge Mall and CrossIron Mills are the most dominant specific Primary Comparison shopping choices for respondents. Interestingly, above these two choices, the highest number of responses was garnered by the response "No Primary Comparison".

FIGURE 6.4

WHAT IS YOUR PRIMARY CONVENIENCE SHOPPING CENTRE?

Q1A: Primay Convenience SC	Number of Responses
No Frills	56
Other	45
Chestermere Station Safeway/Sobeys	37
Costco East Calgary	28
No Primary Convenience	17
Sunridge Mall Real Canadian Superstore	9
East Hills Walmart	8
Total	200

FIGURE 6.5

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

Q1C: Reasons for Primary Convenience SC	Number of Responses
Prices	100
Close to Home	81
Specific Item/Brand	47
Quality of Products	40
Sales Promos	37
Selection of Products	24
Familiarity	21
Buy in Bulk	16
Customer Service	12
One Stop Shop	10
Close to Work/School	7
Easy Access	7
Meets Needs	5
Support Local	5
In the Area	3
Not Crowded	2
Parking	1
Hours of Operation	1
Total	419

As discussed in the above section on Primary Convenience shopping preferences, this noticeable response indicates the potential likelihood of the abundant regional options resulting in no specific preference.

In terms of the reasons for shopping at an identified Comparison shopping location, the proximity to home, selection of stores, and prices of goods are the top reasons as depicted by respondents.

The retail inflow and outflow identified earlier in this report is further substantiated by these results, illustrating the current reality that Chestermere residents must shop outside of the city for comparison goods.

This trend combined with the growing population and spending dynamics reinforces the opportunity for Chestermere to target more tenants and increase the commercial opportunities within the community.

6.4 LIKES & DISLIKES OF RETAIL IN CHESTERMERE

Figures 6.8 and 6.9 highlight the "likes" and "dislikes" of the respondents as it relates to the current shopping opportunities in Chestermere.

The most prevalent response of what is liked by respondents is that the current retail offerings in Chestermere cater to the basic needs of life such as grocery, banks, and other personal services. The reality of retail being close to home and having a community oriented focus are also high on the list of people's appreciation for shopping in Chestermere.

The current retail nodes in Chestermere are primarily located adjacent to residential neighbourhoods; future planned areas continue this strategic trend with retail areas intended to be easily accessible for the surrounding neighbourhoods.

When asked what is disliked about current shopping opportunities, the most prominent response was towards the current selection of stores being offered in Chestermere. Furthermore, substantial input was given towards the dislike of there being no entertainment/ recreation options as well as no hardware store. These results line up with the respondent "likes" of basic needs being met, but that there is a tremendous opportunity available for more types of retail, especially in comparison shopping options.

Another significant area that was shown to be a negative aspect of Chestermere's current retail situation is the inherent requirement of having to go outside of Chestermere for many shopping needs. Society is continually becoming more fast paced, making time an increasingly valuable commodity, and there is widespread awareness of the effects large amounts of commuting can have both on the environment and on physical/ mental health.

FIGURE 6.6

WHAT IS YOUR PRIMARY COMPARISON SHOPPING CENTRE?

Q2A: Primary Comparison SC	Number of Responses
No Primary Comparison	50
Sunridge Mall	41
Cross Iron Mills	35
Other	22
East Hills Walmart	21
Costco East Calgary	12
Chinook Centre	10
Marlborough Mall	4
Downtown Calgary	3
Dearfoot Meadows	2
Total	200

FIGURE 6.7

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

Q2C: Reasons for Primary Comparison SC	Number of Responses
Close to Home	61
Selection of Stores	60
Prices	51
Shop Specific Store	43
Sales Promos	32
One Stop Shop	30
Specific Item Brand	25
Selection of Products	21
Easy Access	14
Clothing	13
Quality Products	10
Close to Work/School	9
Familiarity	7
In the Area	6
Department Stores	6
Not Crowded	4
Buy in Bulk	4
Shoes	4
Customer Service	3
Nothing in Chestermere	3
Parking	1
Support Local	1
Day Out Window Shop	1
Hours of Operation	1
Total	410

FIGURE 6.8

WHAT DO YOU LIKE MOST ABOUT SHOPPING IN CHESTERMERE?

Q23: Like Most About Shopping Opportunities in Chestermere	Number of Responses
Meets Basic Needs	95
Close to Home	60
Community Oriented	50
Customer Service Overall	25
Like New Stores/Restaurants	25
Supports Local	23
Like Specific Store	20
Not Crowded	17
Easy Access	14
Nothing Specific	10
Prices Sales and Promos	8
Proximity/Other Areas Stores	7
Familiarity	6
Variety of Fast Food Venues	6
Close to Work/School	5
Parking/Traffic	5
Professional/Personal Services	5
Selection of Restaurants	3
Hours of Operation	1
Total	385

FIGURE 6.9

WHAT DO YOU DISLIKE MOST ABOUT SHOPPING IN CHESTERMERE?

Q24: Dislike Most About Shopping Opportunities in Chestermere	Number of Responses
Selection of Stores	90
No Entertainment/Recreation	58
No Hardware Store	44
Missing Specific Store Type	34
Have to go Outside Chestermere	34
Selection of Restaurants	33
Nothing Specific	21
Prices Sales and Promos	13
Lack of Competition	7
Professional/Personal Services	5
Waterfront Development	5
Missing Specific Fast Food Venue	5
Needs More Locally Owned Stores	4
Hours of Operation	4
Too Many Liquor Stores	4
Access	3
No Outdoor Seating	2
No Indoor Mall	2
Lack of Transit	2
Parking/Traffic	1
Not in Stock	1
Total	372

FIGURE 6.10

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

Q25: New Stores or Services to Increase Spending/Visits in Chestermere	Number of Responses
Full Service Restaurants	198
Entertainment & Recreation	188
Home Improvement & Garden	150
Clothing/Apparel	117
Footwear	74
Grocery/Specialty Food	62
Limited Service Resaurants	58
Sporting Goods	54
Books Music & DVD	52
Home & Personal Electronics	48
Junior Box Outlet Store	45
Toys Hobbies and Crafts	44
Specialty Retail	33
Home Furnishings & Appliances	28
Costco/Walmart	25
Department Store	16
More Local Stores	16
Automotive Parts & Services	13
More Local Restaurants	13
Personal Services	12
Health & Beauty	12
Drugstore	10
Indoor Mall	7
Jewelry & Accessories	4
Nothing Specific	3
Automotive & Recreational Vehicles	3
More Competition Overall	2
Improve Transit	2
Professional Services	2
Better Variety of Stores	2
Wine Store	1
Total	**1294**

6.5
DESIRED SHOPS & SERVICES

Figures 6.10 through 6.14 illustrate the responses to questions that sought the following:

1. What New Stores/Services would increase your spending in Chestermere (**Figure 6.10**)
2. What Full-Service Restaurants do you want to see in Chestermere? (**Figure 6.11**)
3. What Limited-Service Restaurants do you want to see in Chestermere? (**Figure 6.12**)
4. What Retail Stores do you want to see in Chestermere (**Figure 6.13**)
5. What types of stores do you want to see in Chestermere? (**Figure 6.14**)

Referring to **Figure 6.10,** which allows for multiple responses, respondents overwhelmingly want to see more Full Service Restaurants (198) and Entertainment & Recreation options (188 responses) in Chestermere. Also very high on the list are Home Improvement & Garden (150) and Clothing/Apparel (117).

Introducing these categories or increasing the quality and quantity of offerings in Chestermere would be very well-received and undoubtedly highly utilized by the respondents and residents of the overall trade area.

In response to the desire to see more Full-Service Restaurants (i.e. those with table service) in Chestermere, the survey specifically asked respondents for tenant names. This question elicited significant responses **(Figure 6.11)** for the following Top 3:

1. *The Keg*
2. *Earls Kitchen & Bar*
3. *Cactus Club*

Full-Service Restaurants, such as those identified, are most likely to locate in higher customer traffic and popular shopping areas, and as such the Chestermere Station and future Waterbridge area will be target locations for these types of tenants. However, to be realistic, Cactus Club is likely not to select Chestermere as a location given its strategy for downtown markets or urban locations with dense populations. That said, other more compatible restaurants identified by respondents include Ricky's, Olive Garden, Swiss Chalet, Cora's, Montana's and Chili's.

Figure 6.14 reveals that Full Service restaurant brands and categories were mentioned 267 times when respondents were allowed to provide open ended responses, by far the most sought after category type desired by residents and visitors to Chestermere.

In terms of Limited Service Restaurants, **Figure 6.12** illustrates clearly the desire to have familiar fast food chains such as McDonald's and Wendy's introduced into the local market. Given the growing size of Chestermere, each of these respective tenants may view Chestermere as a viable market in time for two locations.

From a retailer specific perspective, Survey Respondents supported the results shown in **Figures 6.10** by indicating an overwhelming desire to have the following Top 5 retailers in Chestermere as documented in **Figure 6.13**:

1. *Home Hardware*
2. *Canadian Tire*
3. *Home Depot*
4. *Sport Chek*
5. *Rona*

FIGURE 6.11

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

FIGURE 6.12

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

FIGURE 6.13

WHAT RETAIL STORES DO YOU WANT TO SEE IN CHESTERMERE?

FIGURE 6.14

WHAT TYPES OF STORES DO YOU WANT TO SEE IN CHESTERMERE?

FIGURE 6.15

TOP RESPONSES OVERALL - ALL CATEGORIES & TENANT TYPES

Since 3 of these retailers comprise the singular category of Home Improvement & Gardening and clearly speak to this need in Chestermere, a further evaluation would indicate a revised Top 5 that would include the following:

1. *Canadian Tire*
2. *Sport Chek*
3. *Chapters/Indigo*
4. *Best Buy*
5. *Real Canadian Superstore*

Each of these tenants, while considered a larger format, would be critical and essential to creating a critical mass of retail supportable in Chestermere. The competitive nature of East Hills poses opportunities particularly for tenants that may not wish to be located amongst their competitive set, such as Real Canadian Superstore.

6.6 ALL RESPONDENTS SPENDING VERSUS IMPORTANCE

Figures 6.16 & 6.17 examine the Consumer Responses by cross-referencing their spending preferences with their importance ratings for the respective merchandise categories.

This process is conducted for ALL Respondents to indicate a correlation or possibly lack thereof between the amount of spending INSIDE Chestermere on Retail Categories and the Respondents' importance for a respective category in increasing their spending in the City as shown in Figure 6.16. Similarly, Figure 6.17 takes the alternate view and looks at how much spending is occurring OUTSIDE of Chestermere by respondents against those same importance ratings.

The results shown diagrammatically in **Figure 6.16** illustrates those categories that have low spending INSIDE Chestermere, yet have a high importance rating to retaining spending in the community. The categories that best reflect this concept include:

1. *Full Service Restaurants*
2. *Entertainment & Leisure*
3. *Home Improvement & Gardening*
4. *Clothing & Apparel*
5. *Footwear*

Figure 6.17 illustrates the same results but in a different way, whereby the diagram shows high spending OUTSIDE Chestermere (or leakage).

Whichever perspective is used to view spending vs. importance, it nonetheless validates the desire of respondents to have more essential categories and quality in these areas, and provides further market support for prospective tenants looking at the Chestermere market.

6.7 ON-LINE SPENDING PATTERNS

As retail trends continue to evolve and as concerns over traditional brick and mortar stores losing sales to on-line merchants continues (regardless of whether real or perceived), the Consumer Intercept Survey delved into respondents' views about their spending patterns on-line.

Figure 6.18 illustrates that Books, Music, & DVD is the largest on-line shopping category by a considerable amount, garnering 26.9% of spending of those respondents who shopped in that category.

FIGURE 6.16

SPENDING IN CHESTERMERE VS IMPORTANCE RATINGS FOR ALL RESPONDENTS

FIGURE 6.17

SPENDING OUTSIDE CHESTERMERE VS IMPORTANCE RATINGS FOR ALL RESPONDENTS

Clothing & Apparel, and Health & Beauty are the next leading on-line categories, with 8.64% and 8.59% of spending, respectively.

Industry wide the book industry struggles, and the results of the on-line spending suggest that while spending on Books, Music and DVDs is strong on-line, it could pose a challenge in the short term for respondent-identified retailers such as Chapters/Indigo or Best Buy.

The reality for a retailer of that type would be they would likely want to see the market growth continue over the next decade before they firmly entrench themselves. It doesn't preclude them from viewing the market favourably, but they may not likely be among the early entrants to the market.

6.8 SUMMARY & IMPLICATIONS

The Consumer Intercept Survey yielded findings that validated the identified Trade Area, as well as the inclination of Chestermere's current need for more retail, especially as the community continues its growth and expansion.

Chestermere Station which has a Safeway and Sobeys Liquor, and East Calgary Costco served as substantial draws for Primary Convenience shopping.

Sunridge Mall and CrossIron Mills are the most dominant specific Primary Comparison shopping choices for respondents. Interestingly, above these two choices, the highest number of responses was garnered by the response "No Primary Comparison", which is an indicator of the mobility of people to likely patronize other shopping nodes in the region beyond the list surveyed.

The majority of respondents indicated a desire to have more Full Service Restaurants, Entertainment & Recreation, Home Improvement & Garden, and Clothing/Apparel retail options. These categories were also identified as high spending categories for the entire Retail Trade Area.

Specifically, the Top 3 Full Service Restaurants most sought after in Chestermere by respondents were:

1. *The Keg*
2. *Earls Kitchen & Bar*
3. *Cactus Club*

In fact, the Full Service restaurant brands and categories were mentioned 267 times when respondents were allowed to provide open ended responses with multiple brands, thus by far the most sought after category type desired by residents and visitors to Chestermere.

Excluding Home Improvement categories, which garnered an overwhelmingly significant response, the Top 5 retailers most sought in Chestermere by respondents included the following:

1. *Canadian Tire*
2. *Sport Chek*
3. *Chapters/Indigo*
4. *Best Buy*
5. *Real Canadian Superstore*

FIGURE 6.18

PERCENTAGE OF ON-LINE SPENDING BY SURVEY RESPONDENTS

CHESTERMERE

RETAIL
Gap Analysis

APPENDICES

Retail Business Name	Retail Node	Retail Cluster (CENTRAL, EAST, WEST)	General Retail Category	Est. Area (SF)
Dockside Bar & Grill & Diner	Chestermere Landing	CENTRAL	Full Service F&B	6,500
A&W	Chestermere Station	CENTRAL	Limited Service F&B	1,840
Anytime Fitness	Chestermere Station	CENTRAL	Personal Services	4,000
Asset Insurance Brokers	Chestermere Station	CENTRAL	**Non-Retail**	
ATB Financial	Chestermere Station	CENTRAL	Personal Services	5,525
Boston Pizza	Chestermere Station	CENTRAL	Full Service F&B	6,000
Browns Social House	Chestermere Station	CENTRAL	Full Service F&B	3,500
Caribbean Sun Tanning	Chestermere Station	CENTRAL	Personal Services	1,000
Cell Net (Bell)	Chestermere Station	CENTRAL	Specialty Retail	1,000
Chestermere Fabricare	Chestermere Station	CENTRAL	Personal Services	1,000
Chestermere Lake Registry	Chestermere Station	CENTRAL	Personal Services	750
Chestermere Optometry	Chestermere Station	CENTRAL	Personal Services	1,000
Chestermere Station Pediatric Dentristry & Ortho	Chestermere Station	CENTRAL	Personal Services	3,500
CIBC	Chestermere Station	CENTRAL	Personal Services	4,000
Dairy Queen	Chestermere Station	CENTRAL	Limited Service F&B	3,000
Domino's Pizza	Chestermere Station	CENTRAL	Limited Service F&B	1,000
Edo Grill	Chestermere Station	CENTRAL	Limited Service F&B	1,000
Fauna Animal Hospital	Chestermere Station	CENTRAL	**Non-Retail**	
Fun Works Studio	Chestermere Station	CENTRAL	Specialty Retail	1,200
Harveys	Chestermere Station	CENTRAL	Limited Service F&B	2,224
Herbal Magic	Chestermere Station	CENTRAL	Specialty Retail	1,000
Jiffy Lube	Chestermere Station	CENTRAL	**Non-Retail**	
Joey's Urban	Chestermere Station	CENTRAL	Full Service F&B	1,000
Jugo Juice	Chestermere Station	CENTRAL	Limited Service F&B	750
La Vi Nail Spa	Chestermere Station	CENTRAL	Personal Services	1,000
Lakeside Humidor & Smoke	Chestermere Station	CENTRAL	Specialty Retail	500
Lifepath Wellness	Chestermere Station	CENTRAL	Personal Services	5,000
Little Caesars Pizza	Chestermere Station	CENTRAL	Limited Service F&B	1,411
Lube X	Chestermere Station	CENTRAL	**Non-Retail**	
Luna Hair Salon	Chestermere Station	CENTRAL	Health & Beauty	1,000
M&M Meat Shops	Chestermere Station	CENTRAL	Grocery & Specialty Foods	1,000
Magic Nails & Spa	Chestermere Station	CENTRAL	Personal Services	1,000
Malek's Hair Styling & Barbershop	Chestermere Station	CENTRAL	Health & Beauty	1,000
Mary Browns	Chestermere Station	CENTRAL	Limited Service F&B	1,000
MLA Office	Chestermere Station	CENTRAL	**Non-Retail**	
Neighbours and Tims Express - Petro Canada	Chestermere Station	CENTRAL	Grocery & Specialty Foods	2,700
Oasis Medical Centre	Chestermere Station	CENTRAL	Personal Services	1,200
Pet Planet	Chestermere Station	CENTRAL	Specialty Retail	2,000
Pita Basket	Chestermere Station	CENTRAL	Limited Service F&B	750
Pure H2O	Chestermere Station	CENTRAL	Specialty Retail	250
Purelight Wellness Centre	Chestermere Station	CENTRAL	Personal Services	1,000
RBC	Chestermere Station	CENTRAL	Personal Services	5,000
Safeway	Chestermere Station	CENTRAL	Grocery & Specialty Foods	45,000
Scotiabank	Chestermere Station	CENTRAL	Personal Services	4,000
Shoppers Drug Mart	Chestermere Station	CENTRAL	Pharmacy	5,000
Shoppers Drug Mart	Chestermere Station	CENTRAL	Grocery & Specialty Foods	2,000
Shoppers Drug Mart	Chestermere Station	CENTRAL	Health & Beauty	3,000
Shoppers Drug Mart	Chestermere Station	CENTRAL	Specialty Retail	2,000
Sobeys Liquor	Chestermere Station	CENTRAL	Alcohol & Tobacco	6,000
Starbucks Coffee	Chestermere Station	CENTRAL	Limited Service F&B	1,500
Tandoori King	Chestermere Station	CENTRAL	Full Service F&B	1,000
TD Canada Trust	Chestermere Station	CENTRAL	Personal Services	4,500
The General Store	Chestermere Station	CENTRAL	Grocery & Specialty Foods	3,000
Tim Hortons	Chestermere Station	CENTRAL	Limited Service F&B	2,900
Tirecraft	Chestermere Station	CENTRAL	**Non-Retail**	
Trend Fashions LTD	Chestermere Station	CENTRAL	Clothing & Apparel	1,000
VACANT	Chestermere Station	CENTRAL	**VACANT**	1,007
VACANT	Chestermere Station	CENTRAL	**VACANT**	1,000

APPENDIX | RETAIL INVENTORY

Retail Business Name	Retail Node	Retail Cluster (CENTRAL, EAST, WEST)	General Retail Category	Est. Area (SF)
Waiting Room Café	Chestermere Health & Commercial Centre	EAST	Limited Service F&B	1,000
Avleen Skin Care	Chestermere Towne Square	EAST	Health & Beauty	750
Chestermere Law LLP	Chestermere Towne Square	EAST	**Non-Retail**	
Chestermere Medical Centre	Chestermere Towne Square	EAST	**Non-Retail**	
Chestermere Veterinary Clinic	Chestermere Towne Square	EAST	**Non-Retail**	
Chicago Pizza & Donair	Chestermere Towne Square	EAST	Limited Service F&B	750
ECI Learning Academy	Chestermere Towne Square	EAST	**Non-Retail**	
Expedia Cruise Centre	Chestermere Towne Square	EAST	Personal Services	750
go Market	Chestermere Towne Square	EAST	Grocery & Specialty Foods	1,700
Inner Focus Yoga	Chestermere Towne Square	EAST	Personal Services	1,000
Liberty Tax Services	Chestermere Towne Square	EAST	Personal Services	1,000
Moderne Sushi & BBQ	Chestermere Towne Square	EAST	Full Service F&B	4,000
Subway	Chestermere Towne Square	EAST	Limited Service F&B	1,500
VACANT	Chestermere Towne Square	EAST	**VACANT**	1,000
Chestermere Barbershop & Styling	Chestermere Plaza	WEST	Health & Beauty	1,000
Chestermere Dental	Chestermere Plaza	WEST	**Non-Retail**	
Chestermere Pharmacy	Chestermere Plaza	WEST	Pharmacy	750
Gas Plus Convenience	Chestermere Plaza	WEST	Grocery & Specialty Foods	1,400
Global Liquor	Chestermere Plaza	WEST	Alcohol & Tobacco	1,000
Jack's Westside Grill	Chestermere Plaza	WEST	Full Service F&B	1,000
Jessica Restaurant	Chestermere Plaza	WEST	Full Service F&B	2,500
Joffery Optical	Chestermere Plaza	WEST	Personal Services	750
LakeMed Walk-in Clinic	Chestermere Plaza	WEST	**Non-Retail**	
LV Nails & Spa	Chestermere Plaza	WEST	Health & Beauty	1,000
Mo's Liquor	Chestermere Plaza	WEST	Alcohol & Tobacco	1,500
Pho Lan	Chestermere Plaza	WEST	Full Service F&B	1,500
Pizza	Chestermere Plaza	WEST	Limited Service F&B	750
The Cooperators	Chestermere Plaza	WEST	Personal Services	1,000
Trinity Music	Chestermere Plaza	WEST	Specialty Retail	1,000
West Creek Pub	Chestermere Plaza	WEST	Full Service F&B	2,500

Retail Business Name	Retail Node	Retail Cluster (CENTRAL, EAST, WEST)	General Retail Category	Est. Area (SF)
Abstract Dance Academy	Rainbow Falls #1	WEST	**Non-Retail**	
Amato Gelato	Rainbow Falls #1	WEST	Limited Service F&B	1,000
Canadian Pizza Unlimited	Rainbow Falls #1	WEST	Limited Service F&B	1,000
Century Floor Fashions	Rainbow Falls #1	WEST	Specialty Retail	2,000
Chestermere Utilities Incorporated	Rainbow Falls #1	WEST	**Non-Retail**	
Graham's Home Décor	Rainbow Falls #1	WEST	Specialty Retail	1,000
Just a Minute Vietnamese	Rainbow Falls #1	WEST	Full Service F&B	1,000
Mac's	Rainbow Falls #1	WEST	Grocery & Specialty Foods	1,500
Nec's Liquor	Rainbow Falls #1	WEST	Alcohol & Tobacco	2,500
North Taphouse	Rainbow Falls #1	WEST	Full Service F&B	3,500
Obsidian Rose Tattoo	Rainbow Falls #1	WEST	Personal Services	1,000
Sharp Edge Barber Shop	Rainbow Falls #1	WEST	Health & Beauty	1,000
The Lakeshore Esthetics and Tanning	Rainbow Falls #1	WEST	Personal Services	2,000
Zaytoon Market & Kitchen	Rainbow Falls #1	WEST	Grocery & Specialty Foods	2,000
Chestermere Paint and Décor	Rainbow Falls #2	WEST	Specialty Retail	1,000
CTC Martial Arts and Fitness	Rainbow Falls #2	WEST	Personal Services	2,000
Diversion Salon	Rainbow Falls #2	WEST	Personal Services	1,000
Edward Jones Investments	Rainbow Falls #2	WEST	**Non-Retail**	
Evolve Daycare	Rainbow Falls #2	WEST	Personal Services	2,000
Fortis AB	Rainbow Falls #2	WEST	**Non-Retail**	
Lavender Nails & Spa	Rainbow Falls #2	WEST	Personal Services	1,000
No Frills	Rainbow Falls #2	WEST	Grocery & Specialty Foods	30,000
No Frills Liquor	Rainbow Falls #2	WEST	Alcohol & Tobacco	5,000
Pizza Hut	Rainbow Falls #2	WEST	Limited Service F&B	750
Rainbow Falls Dental	Rainbow Falls #2	WEST	Personal Services	1,000
VACANT	Rainbow Falls #2	WEST	**VACANT**	1,000
VACANT	Rainbow Falls #2	WEST	**VACANT**	1,000
VACANT NEW	Rainbow Falls #2	WEST	**VACANT**	1,000
VACANT NEW	Rainbow Falls #2	WEST	**VACANT**	1,000
VACANT NEW	Rainbow Falls #2	WEST	**VACANT**	1,000
VACANT NEW	Rainbow Falls #2	WEST	**VACANT**	1,000
VACANT NEW	Rainbow Falls #2	WEST	**VACANT**	1,000
VACANT NEW	Rainbow Falls #2	WEST	**VACANT**	1,000
VACANT NEW	Rainbow Falls #2	WEST	**VACANT**	1,000
VACANT NEW	Rainbow Falls #2	WEST	**VACANT**	1,000
				266,857

B APPENDIX | CONSUMER SURVEY OPEN-ENDED RESPONSES

Retailer / Tenant Type	Merchandise Category	Number of Responses
Movie Theatre	Entertainment & Leisure	96
Pool (Swimming)	Recreation	67
Home Hardware	Home Improvement & Gardening	50
Canadian Tire	General Merchandise	49
Bowling Alley	Entertainment & Leisure	38
Home Depot	Home Improvement & Gardening	38
McDonald's	Limited Service F&B	38
Sport Chek	Sporting Goods & Outdoor Recreation	37
The Keg	Full Service F&B	36
RONA	Home Improvement & Gardening	29
Chapters/Indigo	Books & Multi-Media	28
Best Buy	Home Electronics & Appliances	25
Greek/Italian	Full Service F&B	23
Real Canadian Superstore	General Merchandise	23
Coop	Grocery & Specialty Foods	22
Earls	Full Service F&B	22
Lowes/REVY	Home Improvement & Gardening	21
Staples	Specialty Retail	20
Cactus Club	Full Service F&B	18
Mark's	Clothing & Apparel	18
Ricky's Grill	Full Service F&B	17
Michaels Crafts	Specialty Retail	16
Olive Garden	Full Service F&B	16
Sports Complex	Recreation	16
Swiss Chalet	Full Service F&B	16
WalMart	General Merchandise	16
Winners	Clothing & Apparel	16
Costco	General Merchandise	15
Live Concerts	Entertainment & Leisure	15
Live Theatre	Entertainment & Leisure	15

Retailer / Tenant Type	Merchandise Category	Number of Responses
Denny's	Full Service F&B	14
Kid's Activities	Entertainment & Leisure	14
Wendy's	Limited Service F&B	13
Home Sense	Home Furnishings & Accessories	12
Old Navy	Clothing & Apparel	12
Toys R Us	Toys & Hobbies	11
Payless Shoes	Footwear	10
Reitmans	Clothing & Apparel	10
Splash Park/Waterslides	Recreation	10
The Brick	Home Furnishings & Accessories	10
24 Hour Gym	Entertainment & Leisure	9
Joey Tomatoes	Full Service F&B	9
Summer Events	Recreation	9
Cora	Full Service F&B	8
London Drugs	General Merchandise	8
Red Lobster	Full Service F&B	8
Repair Shops	Personal Services	8
The Bay	Clothing & Apparel	8
Dollar Tree	General Merchandise	7
Hair Salon	Personal Services	7
Montana's Cookhouse	Full Service F&B	7
The Children's Place	Clothing & Apparel	7
Apple Store	Home Electronics & Appliances	6
Car Dealership	Auto/RV/Motorsports	6
Chinese	Full Service F&B	6
Dollarama	General Merchandise	6
More Doctors	Professional Services	6
Shoe Warehouse	Footwear	6
Skechers	Footwear	6
The Gap	Clothing & Apparel	6
The Shoe Company	Footwear	6

B

Retailer / Tenant Type	Merchandise Category	Number of Responses
Ardene	Clothing & Apparel	5
Chili's	Full Service F&B	5
East Side Mario's	Full Service F&B	5
H&M	Clothing & Apparel	5
IHOP	Full Service F&B	5
Telus	Specialty Retail	5
Thai	Full Service F&B	5
West 49	Clothing & Apparel	5
Auto Parts	Auto Parts, Services & Accessories	4
Casino	Entertainment & Leisure	4
Drive In Theatre	Entertainment & Leisure	4
Japanese	Full Service F&B	4
Lululemon Athletica	Clothing & Apparel	4
Memory Express	Specialty Retail	4
Mini Golf	Entertainment & Leisure	4
Peavy Mart	Home Furnishings & Accessories	4
Perkin's	Full Service F&B	4
Petsmart	Specialty Retail	4
Pool Hall	Entertainment & Leisure	4
Sears	General Merchandise	4
Sephora	Health & Beauty	4
Spas	Personal Services	4
Spring	Footwear	4
Tony Roma's	Full Service F&B	4
Bed Bath & Beyond	Home Furnishings & Accessories	3
Bulk Barn	Specialty Retail	3
Carters | OshKosh B'Gosh	Clothing & Apparel	3
DSW	Footwear	3
East Indian	Full Service F&B	3
Five Guys Burgers & Fries	Limited Service F&B	3

Retailer / Tenant Type	Merchandise Category	Number of Responses
Home Outfitters	Home Furnishings & Accessories	3
Humpty's	Full Service F&B	3
Live Music - Club	Entertainment & Leisure	3
MAC	Health & Beauty	3
Mastermind Toys	Toys & Hobbies	3
Mexican	Full Service F&B	3
Milestons	Full Service F&B	3
Moxie's	Full Service F&B	3
Mr. Mikes	Full Service F&B	3
Mucho Burrito	Limited Service F&B	3
Office Depot	Specialty Retail	3
Original Joe's	Full Service F&B	3
People's Jewelers	Jewelry & Accessories	3
Ricki's	Clothing & Apparel	3
The Bargain Shop	General Merchandise	3
Warehouse One	Clothing & Apparel	3
Whole Foods	Grocery & Specialty Foods	3
YMCA	Recreation	3
Aldo	Footwear	2
American Eagle	Clothing & Apparel	2
Ashley Furniture	Home Furnishings & Accessories	2
Auto Value	Auto Parts, Services & Accessories	2
B&P Cycle & Sports	Sporting Goods & Outdoor Recreation	2
Babies R Us	Specialty Retail	2
Bank of Montreal	Personal Services	2
Bath & Body Works	Health & Beauty	2
Bootleger	Clothing & Apparel	2
Brown's Shoes	Footwear	2
Burger King	Limited Service F&B	2

B

Retailer / Tenant Type	Merchandise Category	Number of Responses
Chopped Leaf	Limited Service F&B	2
Chuck E Cheese	Entertainment & Leisure	2
Cleo's	Clothing & Apparel	2
Dine & Dance	Entertainment & Leisure	2
Dinner Theatre	Entertainment & Leisure	2
Extreme Pita	Limited Service F&B	2
Garage	Clothing & Apparel	2
Golf Town	Sporting Goods & Outdoor Recreation	2
Gymnastics	Recreation	2
IKEA	Home Furnishings & Accessories	2
Indoor Track	Entertainment & Leisure	2
Lammle's Western Wear & Tack	Specialty Retail	2
Leon's Home	Home Furnishings & Accessories	2
Lush	Health & Beauty	2
Marshalls	Clothing & Apparel	2
Mountain Equipment Coop MEC	Sporting Goods & Outdoor Recreation	2
Nike	Footwear	2
Penningtons	Clothing & Apparel	2
Pier 1 Import	Home Furnishings & Accessories	2
Running Room	Footwear	2
Sally's Beauty Supplies	Health & Beauty	2
Save On Foods	Grocery & Specialty Foods	2
Smitty's	Full Service F&B	2
Suzie Shier	Clothing & Apparel	2
T&T Supermarket	Grocery & Specialty Foods	2
The Discovery Hut	Specialty Retail	2

Retailer / Tenant Type	Merchandise Category	Number of Responses
The Source	Home Electronics & Appliances	2
Vietnamese	Full Service F&B	2
Addition Elle	Clothing & Apparel	1
Adidas	Footwear	1
AMA Clothing Accessories	Clothing & Apparel	1
Applebees	Full Service F&B	1
Arcade & Game Room	Entertainment & Leisure	1
Blaze Pizza	Limited Service F&B	1
Blue Star Diner	Full Service F&B	1
Bluenotes	Clothing & Apparel	1
Buffalo Wild Wings	Full Service F&B	1
Cabelas	Sporting Goods & Outdoor Recreation	1
Cattle Baron	Full Service F&B	1
Cimbing Wall	Entertainment & Leisure	1
Clarks Shoes	Footwear	1
Cobs Bread	Grocery & Specialty Foods	1
Comedy Club	Entertainment & Leisure	1
Crate & Barrell	Home Furnishings & Accessories	1
Dry Cleaners	Personal Services	1
Event Space	Entertainment & Leisure	1
Fabricland	Specialty Retail	1
Family Entertainment	Entertainment & Leisure	1
Foot Locker	Footwear	1
Freshii	Limited Service F&B	1
Gymboree	Clothing & Apparel	1
Habitat for Humanity Rstore	Specialty Retail	1
Harley Davidson	Auto/RV/Motorsports	1
Home Mart	Home Furnishings & Accessories	1
Justice	Clothing & Apparel	1

B

Retailer / Tenant Type	Merchandise Category	Number of Responses
Lazy Boy Gallery	Home Furnishings & Accessories	1
Le Chateau	Clothing & Apparel	1
Long & McQuade	Specialty Retail	1
Long Term Care Centre	Professional Services	1
Moores	Clothing & Apparel	1
New Dynasty	Full Service F&B	1
Once Upon A Child	Specialty Retail	1
Outdoor Skating Rink	Recreation	1
Panago Pizza	Limited Service F&B	1
Pet Emporium	Specialty Retail	1
Petland	Specialty Retail	1
Phil's	Full Service F&B	1
Pizza Delight	Limited Service F&B	1
Planet Organic	Grocery & Specialty Foods	1
Quiznos	Limited Service F&B	1
RW&CO	Clothing & Apparel	1
Sail Outdoor	Specialty Retail	1
Shanks Sports Bar	Entertainment & Leisure	1
Sobeys	Grocery & Specialty Foods	1
Sport Mart	Sporting Goods & Outdoor Recreation	1
State & Main	Full Service F&B	1
Strikers	Specialty Retail	1
Sunterra Market	Grocery & Specialty Foods	1
Taco Bel	Limited Service F&B	1
The Coup	Full Service F&B	1
Treehouse Restaurant	Full Service F&B	1
White Spot	Full Service F&B	1

CHESTERMERE_ CONSUMER_ SURVEY_ 2016

INTERVIEW LOCATION

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	CHESTERMERE STATION	82	41.0	41.0	41.0
	CHESTERMERE REC CENTRE	33	16.5	16.5	57.5
	CHESTERMERE BUSINESS PARK	85	42.5	42.5	100.0
	Total	200	100.0	100.0	

CITY RESPONDENT RESIDES

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	CHESTERMERE	135	67.5	67.5	67.5
	CONRICH	2	1.0	1.0	68.5
	LANGDON	3	1.5	1.5	70.0
	CITY OF CALGARY	35	17.5	17.5	87.5
	OTHER ROCKY VIEW COUNTY	17	8.5	8.5	96.0
	OTHER CITY	8	4.0	4.0	100.0
	Total	200	100.0	100.0	

Q1A. PRIMARY CONVENIENCE SHOPPING CENTER

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	NO CONVENIENCE PRIMARY	17	8.5	8.5	8.5
	CHESTERMERE STATION	37	18.5	18.5	27.0
	NO FRILLS	56	28.0	28.0	55.0
	EAST HILLS WM	8	4.0	4.0	59.0
	COSTCO EAST CALGARY	28	14.0	14.0	73.0
	SUNRIDGE MALL RCSS	9	4.5	4.5	77.5
	OTHER	45	22.5	22.5	100.0
	Total	200	100.0	100.0	

Descriptive Statistics

	N	Minimum	Maximum	Mean	Std. Deviation
Q1B. $ EXPENDITURE AT PRIMARY CONVENIENCE SC	198	60	2000	530.10	352.109
Valid N (listwise)	198				

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APPENDIX | CONSUMER SURVEY FULL RESPONSES

CHESTERMERE_ CONSUMER_ SURVEY_ 2016

$Q1C Frequencies

		Responses		Percent of Cases
		N	Percent	
Q1C. MAIN REASONS SHOP PRIMARY CONVENIENCE SC - Multiple Response[a]	CLOSE TO HOME	81	19.3%	40.5%
	CLOSE WORK SCHOOL	7	1.7%	3.5%
	PRICES	100	23.9%	50.0%
	ONE STOP SHOP	10	2.4%	5.0%
	NOT CROWDED	2	0.5%	1.0%
	FAMILIARITY	21	5.0%	10.5%
	PARKING	1	0.2%	0.5%
	CUSTOMER SERVICE	12	2.9%	6.0%
	SALES PROMOS	37	8.8%	18.5%
	BUY IN BULK	16	3.8%	8.0%
	SUPPORT LOCAL	5	1.2%	2.5%
	SELECTION PRODUCTS	24	5.7%	12.0%
	SPECIFIC ITEM BRAND	47	11.2%	23.5%
	IN THE AREA	3	0.7%	1.5%
	QUALITY PRODUCTS	40	9.5%	20.0%
	MEETS NEEDS	5	1.2%	2.5%
	EASY ACCESS	7	1.7%	3.5%
	HOURS OF OPERATION	1	0.2%	0.5%
Total		419	100.0%	209.5%

a. Group

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CHESTERMERE_ CONSUMER_ SURVEY_ 2016

Q2A. PRIMARY COMPARISON SHOPPING CENTER

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	NO COMPARISON PRIMARY	50	25.0	25.0	25.0
	CROSS IRON MILLS	35	17.5	17.5	42.5
	EAST HILL WM	21	10.5	10.5	53.0
	COSTCO EAST CALGARY	12	6.0	6.0	59.0
	MARLBOROUGH MALL SW	4	2.0	2.0	61.0
	SUNRIDGE MALL RCSS	41	20.5	20.5	81.5
	CHINOOK SC	10	5.0	5.0	86.5
	DEARFOOT MEADOWS	2	1.0	1.0	87.5
	DOWNTOWN CALGARY	3	1.5	1.5	89.0
	OTHER	22	11.0	11.0	100.0
	Total	200	100.0	100.0	

Descriptive Statistics

	N	Minimum	Maximum	Mean	Std. Deviation
Q2B. $ EXPENDITURE AT PRIMARY COMPARISON SC	195	10	1000	230.38	189.958
Valid N (listwise)	195				

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C

CHESTERMERE_ CONSUMER_ SURVEY_ 2016

$Q2C Frequencies

		Responses		Percent of Cases
		N	Percent	
Q2C. MAIN REASONS SHOP PRIMARY COMPARISON SC - Multiple Response[a]	CLOSE TO HOME	61	14.9%	30.5%
	CLOSE WORK SCHOOL	9	2.2%	4.5%
	PRICES	51	12.4%	25.5%
	ONE STOP SHOP	30	7.3%	15.0%
	NOT CROWDED	4	1.0%	2.0%
	FAMILIARITY	7	1.7%	3.5%
	PARKING	1	0.2%	0.5%
	CUSTOMER SERVICE	3	0.7%	1.5%
	SALES PROMOS	32	7.8%	16.0%
	BUY IN BULK	4	1.0%	2.0%
	SUPPORT LOCAL	1	0.2%	0.5%
	SELECTION PRODUCTS	21	5.1%	10.5%
	SELECTION STORES	60	14.6%	30.0%
	SHOP SPECIFIC STORE	43	10.5%	21.5%
	SPECIFIC ITEM BRAND	25	6.1%	12.5%
	DAY OUT WINDOW SHOP	1	0.2%	0.5%
	IN THE AREA	6	1.5%	3.0%
	QUALITY PRODUCTS	10	2.4%	5.0%
	CLOTHING	13	3.2%	6.5%
	SHOES	4	1.0%	2.0%
	DEPARTMENT STORES	6	1.5%	3.0%
	EASY ACCESS	14	3.4%	7.0%
	HOURS OF OPERATION	1	0.2%	0.5%
	NOTHING IN CHESTERMERE	3	0.7%	1.5%
Total		410	100.0%	205.0%

a. Group

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CHESTERMERE_ CONSUMER_ SURVEY_ 2016

Descriptive Statistics

	N	Minimum	Maximum	Mean	Std. Deviation
Q3A. % SPEND GROCERY SPECIALTY FOOD CHESTERMERE PAST 3 MONTHS	200	0	100	50.93	36.355
Q3B. % SPEND GROCERY SPECIALTY FOOD OUTSIDE CHESTERMERE PAST 3 MONTHS	200	0	100	48.92	36.178
Q3C. % SPEND GROCERY SPECIALTY FOOD ONLINE PAST 3 MONTHS	200	0	20	.15	1.578
Q3D. IMPORTANCE RATING ADD GROCERY SPECIALTY FOOD TO CHESTERMERE	200	1	10	4.91	3.537
Q4A. % SPEND PHARMACEUTICAL CHESTERMERE PAST 3 MONTHS	200	0	100	55.20	47.737
Q4B. % SPEND PHARMACEUTICAL OUTSIDE CHESTERMERE PAST 3 MONTHS	200	0	100	24.78	40.895
Q4C. % SPEND PHARMACEUTICAL ONLINE PAST 3 MONTHS	200	0	95	.53	6.751
Q4D. IMPORTANCE RATING ADD PHARMACEUTICAL TO CHESTERMERE	200	1	10	2.29	2.291
Q5A. % SPEND ALCOHOL TOBACCO CHESTERMERE PAST 3 MONTHS	200	0	100	51.02	47.502
Q5B. % SPEND ALCOHOL TOBACCO OUTSIDE CHESTERMERE PAST 3 MONTHS	200	0	100	17.99	35.033
Q5C. % SPEND ALCOHOL TOBACCO ONLINE PAST 3 MONTHS	200	0	0	.00	.000
Q5D. IMPORTANCE RATING ADD ALCOHOL TOBACCO TO CHESTERMERE	199	1	10	1.87	1.853
Q6A. % USE PERSONAL SERVICES CHESTERMERE PAST 3 MONTHS	200	0	100	38.85	45.531
Q6B. % USE PERSONAL SERVICES OUTSIDE CHESTERMERE PAST 3 MONTHS	200	0	100	35.08	44.776
Q6C. % USE PERSONAL SERVICES ONLINE PAST 3 MONTHS	200	0	90	1.08	7.466
Q6D. IMPORTANCE RATING ADD PERSONAL SERVICES TO CHESTERMERE	199	1	10	2.79	2.690

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CHESTERMERE_ CONSUMER_ SURVEY_ 2016

Descriptive Statistics

	N	Minimum	Maximum	Mean	Std. Deviation
Q7A. % SPEND CLOTHING APPAREL CHESTERMERE PAST 3 MONTHS	200	0	100	.83	7.465
Q7B. % SPEND CLOTHING APPAREL OUTSIDE CHESTERMERE PAST 3 MONTHS	200	0	100	76.54	37.519
Q7C. % SPEND CLOTHING APPAREL ONLINE PAST 3 MONTHS	200	0	100	8.64	20.480
Q7D. IMPORTANCE RATING ADD CLOTHING APPAREL TO CHESTERMERE	200	1	10	6.31	3.542
Q8A. % SPEND FOOTWEAR CHESTERMERE PAST 3 MONTHS	200	0	100	.50	7.071
Q8B. % SPEND FOOTWEAR OUTSIDE CHESTERMERE PAST 3 MONTHS	200	0	100	64.77	46.693
Q8C. % SPEND FOOTWEAR ONLINE PAST 3 MONTHS	200	0	100	5.23	19.615
Q8D. IMPORTANCE RATING ADD FOOTWEAR TO CHESTERMERE	200	1	10	5.41	3.515
Q9A. % SPEND JEWELRY & ACCESSORIES CHESTERMERE PAST 3 MONTHS	200	0	100	8.10	26.417
Q9B. % SPEND JEWELRY & ACCESSORIES OUTSIDE CHESTERMERE PAST 3 MONTHS	200	0	100	26.90	43.383
Q9C. % SPEND JEWELRY & ACCESSORIES ONLINE PAST 3 MONTHS	200	0	100	6.50	23.415
Q9D. IMPORTANCE RATING ADD JEWELRY & ACCESSORIES TO CHESTERMERE	200	1	10	3.14	2.895
Q10A. % SPEND HEALTH & BEAUTY CHESTERMERE PAST 3 MONTHS	200	0	100	43.06	43.019
Q10B. % SPEND HEALTH & BEAUTY OUTSIDE CHESTERMERE PAST 3 MONTHS	200	0	100	38.85	41.148
Q10C. % SPEND HEALTH & BEAUTY ONLINE PAST 3 MONTHS	200	0	100	8.59	26.050
Q10D. IMPORTANCE RATING ADD HEALTH & BEAUTY TO CHESTERMERE	200	1	10	2.95	2.842

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CHESTERMERE_ CONSUMER_ SURVEY_ 2016

Descriptive Statistics

	N	Minimum	Maximum	Mean	Std. Deviation
Q11A. % SPEND HOME FURNISHINGS APPLIANCES CHESTERMERE PAST 3 MONTHS	200	0	100	1.00	9.975
Q11B. % SPEND HOME FURNISHINGS APPLIANCES OUTSIDE CHESTERMERE PAST 3 MONTHS	200	0	100	45.85	49.827
Q11C. % SPEND HOME FURNISHINGS APPLIANCES ONLINE PAST 3 MONTHS	200	0	20	.15	1.578
Q11D. IMPORTANCE RATING ADD HOME FURNISHINGS APPLIANCES TO CHESTERMERE	199	1	10	4.03	3.234
Q12A. % SPEND HOME & PERSONAL ELECTRONICS CHESTERMERE PAST 3 MONTHS	200	0	100	1.00	9.975
Q12B. % SPEND HOME & PERSONAL ELECTRONICS OUTSIDE CHESTERMERE PAST 3 MONTHS	200	0	100	36.25	47.452
Q12C. % SPEND HOME & PERSONAL ELECTRONICS ONLINE PAST 3 MONTHS	200	0	100	6.25	22.760
Q12D. IMPORTANCE RATING ADD HOME & PERSONAL ELECTRONICS TO CHESTERMERE	199	1	10	4.18	3.296
Q13A. % SPEND HOME IMPROVEMENT & GARDEN CHESTERMERE PAST 3 MONTHS	200	0	100	2.60	13.281
Q13B. % SPEND HOME IMPROVEMENT & GARDEN OUTSIDE CHESTERMERE PAST 3 MONTHS	200	0	100	52.05	49.088
Q13C. % SPEND HOME IMPROVEMENT & GARDEN ONLINE PAST 3 MONTHS	200	0	100	1.35	10.642
Q13D. IMPORTANCE RATING ADD HOME IMPROVEMENT & GARDEN TO CHESTERMERE	199	1	10	6.86	3.758
Q14A. % SPEND BOOKS MUSIC DVD CHESTERMERE PAST 3 MONTHS	200	0	100	.85	8.611
Q14B. % SPEND BOOKS MUSIC DVD OUTSIDE CHESTERMERE PAST 3 MONTHS	200	0	100	29.75	43.568
Q14C. % SPEND BOOKS MUSIC DVD ONLINE PAST 3 MONTHS	200	0	100	26.90	42.161

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CHESTERMERE_ CONSUMER_ SURVEY_ 2016

Descriptive Statistics

	N	Minimum	Maximum	Mean	Std. Deviation
Q14D. IMPORTANCE RATING ADD BOOKS MUSIC DVD TO CHESTERMERE	200	1	10	4.34	3.383
Q15A. % SPEND SPORTING GOODS CHESTERMERE PAST 3 MONTHS	200	0	0	.00	.000
Q15B. % SPEND SPORTING GOODS OUTSIDE CHESTERMERE PAST 3 MONTHS	200	0	100	32.33	46.395
Q15C. % SPEND SPORTING GOODS ONLINE PAST 3 MONTHS	200	0	100	2.18	12.951
Q15D. IMPORTANCE RATING ADD SPORTING GOODS TO CHESTERMERE	200	1	10	4.20	3.367
Q16A. % SPEND TOYS HOBBIES CRAFTS CHESTERMERE PAST 3 MONTHS	200	0	100	4.15	17.969
Q16B. % SPEND TOYS HOBBIES CRAFTS OUTSIDE CHESTERMERE PAST 3 MONTHS	200	0	100	41.90	47.726
Q16C. % SPEND TOYS HOBBIES CRAFTS ONLINE PAST 3 MONTHS	200	0	100	4.95	19.517
Q16D. IMPORTANCE RATING ADD TOYS HOBBIES CRAFTS TO CHESTERMERE	200	1	10	4.36	3.358
Q17A. % SPEND SPECIALTY RETAIL CHESTERMERE PAST 3 MONTHS	200	0	100	19.88	37.240
Q17B. % SPEND SPECIALTY RETAIL OUTSIDE CHESTERMERE PAST 3 MONTHS	200	0	100	39.72	46.273
Q17C. % SPEND SPECIALTY RETAIL ONLINE PAST 3 MONTHS	200	0	80	1.40	9.353
Q17D. IMPORTANCE RATING ADD SPECIALTY RETAIL TO CHESTERMERE	200	1	10	3.54	3.088
Q18A. % EAT OUT FULL SERVICE RESTAURANTS CHESTERMERE PAST 3 MONTHS	200	0	100	31.02	32.234
Q18B. % EAT OUT FULL SERVICE RESTAURANTS OUTSIDE CHESTERMERE PAST 3 MONTHS	200	0	100	57.98	36.564
Q18C. % EAT OUT FULL SERVICE RESTAURANTS ONLINE PAST 3 MONTHS	200	0	0	.00	.000

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CHESTERMERE_ CONSUMER_ SURVEY_ 2016

Descriptive Statistics

	N	Minimum	Maximum	Mean	Std. Deviation
Q18D. IMPORTANCE RATING ADD FULL SERVICE RESTAURANTS TO CHESTERMERE	200	1	10	7.45	3.242
Q19A. % EAT OUT LIMITED SERVICE RESTAURANTS CAFES CHESTERMERE PAST 3 MONTHS	200	0	100	47.14	34.980
Q19B. % EAT OUT LIMITED SERVICE RESTAURANTS CAFES OUTSIDE CHESTERMERE PAST 3 MONTHS	200	0	100	45.36	34.788
Q19C. % EAT OUT LIMITED SERVICE RESTAURANTS CAFES ONLINE PAST 3 MONTHS	200	0	0	.00	.000
Q19D. IMPORTANCE RATING ADD LIMITED SERVICE RESTAURANTS CAFES TO CHESTERMERE	200	1	10	4.01	3.629
Q20A. % USE ENTERTAINMENT CHESTERMERE PAST 3 MONTHS	200	0	50	.25	3.536
Q20B. % USE ENTERTAINMENT OUTSIDE CHESTERMERE PAST 3 MONTHS	200	0	100	78.25	41.206
Q20C. % USE ENTERTAINMENT ONLINE PAST 3 MONTHS	200	0	100	.50	7.071
Q20D. IMPORTANCE RATING ADD ENTERTAINMENT TO CHESTERMERE	200	1	10	7.34	3.277
Q21A. % SPEND AUTOMOTIVE RECREATIONAL VEHICLES CHESTERMERE PAST 3 MONTHS	200	0	50	.25	3.536
Q21B. % SPEND AUTOMOTIVE RECREATIONAL VEHICLES OUTSIDE CHESTERMERE PAST 3 MONTHS	200	0	100	11.75	32.087
Q21C. % SPEND AUTOMOTIVE RECREATIONAL VEHICLES ONLINE PAST 3 MONTHS	200	0	100	1.00	9.975
Q21D. IMPORTANCE RATING ADD AUTOMOTIVE RECREATIONAL VEHICLES TO CHESTERMERE	199	1	10	2.32	2.346
Q22A. % SPEND AUTOMOTIVE PARTS & SERVICES CHESTERMERE PAST 3 MONTHS	200	0	100	23.98	40.398
Q22B. % SPEND AUTOMOTIVE PARTS & SERVICES OUTSIDE CHESTERMERE PAST 3 MONTHS	200	0	100	48.03	48.050

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Descriptive Statistics

	N	Minimum	Maximum	Mean	Std. Deviation
Q22C. % SPEND AUTOMOTIVE PARTS & SERVICES ONLINE PAST 3 MONTHS	200	0	50	.50	4.987
Q22D. IMPORTANCE RATING ADD AUTOMOTIVE PARTS & SERVICES TO CHESTERMERE	199	1	10	3.28	3.230
Valid N (listwise)	197				

$Q23 Frequencies

		Responses		Percent of Cases
		N	Percent	
Q23. LIKE MOST ABOUT SHOPPING OPPORTUNITIES IN CHESTERMERE - Multiple Response[a]	NOTHING SPECIFIC	10	2.6%	5.0%
	CLOSE TO HOME	60	15.6%	30.0%
	CLOSE TO WORK SCHOOL	5	1.3%	2.5%
	PRICES SALES PROMOS	8	2.1%	4.0%
	NOT CROWDED BUSY	17	4.4%	8.5%
	MEETS BASIC NEEDS	95	24.7%	47.5%
	PARKING TRAFFIC	5	1.3%	2.5%
	CUSTOMER SERVICE OVERALL	25	6.5%	12.5%
	EASY ACCESS	14	3.6%	7.0%
	SELECTION RESTAURANTS	3	0.8%	1.5%
	LIKE SPECIFIC STORE	20	5.2%	10.0%
	PROFESSIONAL PERSONAL SERVICES	5	1.3%	2.5%
	PROXIMITY OTHER AREAS STORES	7	1.8%	3.5%
	SUPPORTS LOCAL	23	6.0%	11.5%
	FAMILIARITY	6	1.6%	3.0%
	LIKE NEW STORES RESTAURANTS	25	6.5%	12.5%
	HOURS OF OPERATION	1	0.3%	0.5%
	COMMUNITY ORIENTED	50	13.0%	25.0%
	VARIETY FAST FOOD VENUES	6	1.6%	3.0%
Total		385	100.0%	192.5%

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$Q24 Frequencies

		Responses		Percent of Cases
		N	Percent	
Q24. DISLIKE MOST ABOUT SHOPPING OPPORTUNITIES IN CHESTERMERE - Multiple Response[a]	NOTHING SPECIFIC	21	5.6%	10.5%
	PRICES SALES PROMOS	13	3.5%	6.5%
	PARKING TRAFFIC	1	0.3%	0.5%
	ACCESS	3	0.8%	1.5%
	SELECTION STORES	90	24.2%	45.0%
	SELECTION RESTAURANTS	33	8.9%	16.5%
	MISSING SPECIFIC STORE TYPE	34	9.1%	17.0%
	PROFESSIONAL PERSONAL SERVICES	5	1.3%	2.5%
	NOT IN STOCK	1	0.3%	0.5%
	HAVE TO GO OUTSIDE CHESTERMERE	34	9.1%	17.0%
	NEEDS MORE LOCALLY OWNED STORES	4	1.1%	2.0%
	NO ENTERTAINMENT RECREATION	58	15.6%	29.0%
	LACK OF COMPETITION	7	1.9%	3.5%
	HOURS OF OPERATION	4	1.1%	2.0%
	WATERFRONT DEVELOPMENT	5	1.3%	2.5%
	TOO MANY LIQUOR STORES	4	1.1%	2.0%
	NO HARDWARE STORE	44	11.8%	22.0%
	MISSING SPECIFIC FAST FOOD VENUE	5	1.3%	2.5%
	NO OUTDOOR SEATING	2	0.5%	1.0%
	NO INDOOR MALL	2	0.5%	1.0%
	LACK OF TRANSIT	2	0.5%	1.0%
Total		372	100.0%	186.0%

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$Q25 Frequencies

		Responses		Percent of Cases
		N	Percent	
Q25. STORES SERVICES INCREASE SPENDING IN CHESTERMERE - Multiple Response[a]	NOTHING SPECIFIC	3	0.2%	1.5%
	DEPT STORE	16	1.2%	8.0%
	JUNIOR BOX OUTLET STORE	45	3.5%	22.5%
	GROCERY SPECIALTY FOOD	62	4.8%	31.0%
	DRUGSTORE	10	0.8%	5.0%
	WINE STORE	1	0.1%	0.5%
	PERSONAL SERVICES	12	0.9%	6.0%
	CLOTHING APPAREL	117	9.0%	58.5%
	FOOTWEAR	74	5.7%	37.0%
	JEWELRY & ACCESSORIES	4	0.3%	2.0%
	HEALTH & BEAUTY	12	0.9%	6.0%
	HOME FURNISHINGS APPLIANCES	28	2.2%	14.0%
	HOME & PERSONAL ELECTRONICS	48	3.7%	24.0%
	HOME IMPROVEMENT & GARDEN	150	11.6%	75.0%
	BOOKS MUSIC DVD	52	4.0%	26.0%
	SPORTING GOODS	54	4.2%	27.0%
	TOYS HOBBIES CRAFTS	44	3.4%	22.0%
	SPECIALTY RETAIL	33	2.6%	16.5%
	FULL SERVICE RESTAURANTS	198	15.3%	99.0%
	LIMITED SERVICE RESTAURANTS CAFES	58	4.5%	29.0%
	ENTERTAINMENT RECREATION	188	14.5%	94.0%
	AUTOMOTIVE RECREATIONAL VEHICLES	3	0.2%	1.5%
	AUTOMOTIVE PARTS & SERVICES	13	1.0%	6.5%
	INDOOR MALL	7	0.5%	3.5%
	MORE COMPETITION OVERALL	2	0.2%	1.0%
	MORE LOCAL STORES	16	1.2%	8.0%
	MORE LOCAL RESTAURANTS	13	1.0%	6.5%
	IMPROVE TRANSIT	2	0.2%	1.0%
	PROFESSIONAL SERVICES	2	0.2%	1.0%
	COSTCO WAL MART	25	1.9%	12.5%
	BETTER VARIETY OF STORES	2	0.2%	1.0%
Total		1294	100.0%	647.0%

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Q26. YOU OR ANYONE IN HOUSEHOLD PARTICIPATE IN RECREATION PROGRAMS

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	YES	109	54.5	54.5	54.5
	NO	91	45.5	45.5	100.0
	Total	200	100.0	100.0	

Q27A. REQUIRE CHILDCARE SERVICES BEFORE SCHOOL

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	YES	15	7.5	7.5	7.5
	NO	185	92.5	92.5	100.0
	Total	200	100.0	100.0	

Q27B. REQUIRE CHILDCARE SERVICES AFTER SCHOOL

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	YES	18	9.0	9.0	9.0
	NO	182	91.0	91.0	100.0
	Total	200	100.0	100.0	

Q27C. REQUIRE CHILDCARE SERVICES DURING SUMMER MONTHS

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	YES	17	8.5	8.5	8.5
	NO	183	91.5	91.5	100.0
	Total	200	100.0	100.0	

Statistics

		D1. HOUSEHOLD SIZE	D2. # HOUSEHOLD < 18 YEARS OLD
N	Valid	200	200
	Missing	0	0
Mean		3.39	1.04

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D1. HOUSEHOLD SIZE

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	14	7.0	7.0	7.0
	2	55	27.5	27.5	34.5
	3	42	21.0	21.0	55.5
	4	50	25.0	25.0	80.5
	5	19	9.5	9.5	90.0
	6	12	6.0	6.0	96.0
	7	5	2.5	2.5	98.5
	8	2	1.0	1.0	99.5
	10	1	.5	.5	100.0
	Total	200	100.0	100.0	

D2. # HOUSEHOLD < 18 YEARS OLD

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	0	99	49.5	49.5	49.5
	1	32	16.0	16.0	65.5
	2	44	22.0	22.0	87.5
	3	15	7.5	7.5	95.0
	4	7	3.5	3.5	98.5
	5	3	1.5	1.5	100.0
	Total	200	100.0	100.0	

D3. RESPONDENT AGE

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	REFUSED	1	.5	.5	.5
	18-24	18	9.0	9.0	9.5
	25-34	48	24.0	24.0	33.5
	35-44	48	24.0	24.0	57.5
	45-54	31	15.5	15.5	73.0
	55-64	31	15.5	15.5	88.5
	65-74	23	11.5	11.5	100.0
	Total	200	100.0	100.0	

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D4. HOUSEHOLD YEARLY INCOME

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	REFUSED DK	26	13.0	13.0	13.0
	$15,000-$24,999	3	1.5	1.5	14.5
	$25,000-$34,999	4	2.0	2.0	16.5
	$35,000-$44,999	10	5.0	5.0	21.5
	$45,000-$54,999	5	2.5	2.5	24.0
	$55,000-$64,999	9	4.5	4.5	28.5
	$65,000-$74,999	12	6.0	6.0	34.5
	$75,000-$99,999	33	16.5	16.5	51.0
	$100,000-$124,999	44	22.0	22.0	73.0
	$125,000+	54	27.0	27.0	100.0
	Total	200	100.0	100.0	

D5. RESPONDENT GENDER

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	MALE	56	28.0	28.0	28.0
	FEMALE	144	72.0	72.0	100.0
	Total	200	100.0	100.0	

DAY OF INTERVIEW

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	TUES APRIL 5	25	12.5	12.5	12.5
	WED APRIL 6	45	22.5	22.5	35.0
	THURS APRIL 7	45	22.5	22.5	57.5
	FRI APRIL 8	40	20.0	20.0	77.5
	SAT APRIL 9	45	22.5	22.5	100.0
	Total	200	100.0	100.0	

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TIME OF INTERVIEW

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	MORNING	58	29.0	29.0	29.0
	AFTERNOON	105	52.5	52.5	81.5
	EVENING	37	18.5	18.5	100.0
	Total	200	100.0	100.0	

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CHESTERMERE

RETAIL GAP ANALYSIS

CUSHING TERRELL
ARCHITECTURE INC.