key planning strategies

Lac La Biche
Retail Gap Analysis

Lac La Biche County
welcoming by nature.

April 2019

Retail Gap Analysis

key planning strategies

Member of
International Council
of Shopping Centers

P3 Retail
ICSC Alliance for Public-Private Partnership

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PREFACE

Key Planning Strategies ("Key Planning") was commissioned by Lac La Biche County ("the County") to conduct a Retail Gap Analysis for the Hamlet of Lac La Biche ("Lac La Biche"), including the Hamlet of Plamondon ("Plamondon"). The study was carried out over the period of January-April 2019.

The objective of this study is to thoroughly document Lac La Biche's current retail inventory. The next step estimates the realistic retail Trade Area area for which the County serves and the retail expenditure profile across various retail categories/store types as an indication of retail inflow/outflow and opportunities therein that the County could potentially pursue. The end result is to fill gaps and bolster the local retail market by retaining or attracting greater market share of resident and passing motorists' spending in the community.

Key Planning engaged the assistance of MDB Insight ("MDB") who conducted a Telephone Consumer Survey as well as an additional Online Consumer Survey using the County's social media resources including the County website and Facebook.

Retail spending (i.e. demand), the County's retail inventory, and corresponding productivity (i.e. supply) was estimated to identify gaps in the County's current provision of shops and services.

This document is intended to assist the County in promoting the community, working with developers and investors, as well as attracting new retail or business opportunities. It further aims to assist Planning as it relates to the optimal allocation for future retail commercial lands, specifically in the Hamlet of Lac La Biche.

Reference material for this report was obtained from, but not limited to: the County, Commercial Real Estate/Property Management Firms, International Council of Shopping Centers, and Key Planning, as well as conversations with local businesses in the community.

Key Planning 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 Lac La Biche or Plamondon but rather that they could represent compatible "target" category types to pursue either for local businesses or external regional businesses over the next decade.

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

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 Lac La Biche County, Key Planning Strategies or MDB Insight.

Key Planning Strategies
2019

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INTRODUCTION

Key Planning Strategies ("Key Planning") was commissioned by Lac La Biche County ("the County") to conduct a Retail Gap Analysis for the Hamlet of Lac La Biche ("Lac La Biche"), including the Hamlet of Plamondon ("Plamondon").

LOCAL & REGIONAL CONTEXT

Lac La Biche is located approximately 2 hour drive time northeast of the City of Fort Saskatchewan. Lac La Biche represents a key centrality within a region for which drive times of 30, 60 and 90-minutes emanate. These drive times are critical to supporting a strong retail market. Most notably, Lac La Biche services a 60-minute drive time west/northwest, 75 minutes drive time south/southeast and a 90-minute drive time north/northeast.

From a retail commercial perspective, Lac La Biche encourages commercial development in the Downtown along 101st Avenue as well as along the Highway 55 east-west corridor on the west side of town. Recently, commercial growth in the form of hotels and potential development has been observed at the Highway 55 Bypass at the junction of Route 881 south. In addition to new retail lands being made available for commercial development at the west and south ends of the community, Lac La Biche has an important centrally located downtown core that runs predominantly along 101st Avenue between 105th St and 100th St.

RETAIL TRADE AREA

The County's most recent census data from the February 2017 Statistics Canada release revealed a population of 8,330 in 2016. The Total Trade Area population is estimated for year end 2017 to be just under 27,000 (26,645). This population is forecast to surpass 29,000 (29,139) by 2027.

It is realistic for the County to focus on Lac La Biche's existing Trade Area, but also harness its strategic location along Hwy 55 to serve as an ideal pit stop for passing motorists and other target users, particularly at the junction of Hwy 55 and 101st Avenue. Highway motorists are creatures of habit who tend to stay in their vehicles unless the environment is convenient for them to stop; Lac La Biche has this potential.

The Trade Area population growth dynamics do not exhibit strong projected growth, which suggests that focus should be on diligently attracting the types of retail that would benefit the community and target the latter noted highway motorists.

The Total Trade Area retail spending is estimated at $380 Million (2018 year-end estimate). When excluding Auto Parts and Dealerships, this figure comes in at $305 million.

The County's share of the Total Trade Area spending is estimated at 38%, which illustrates the regional draw that is supportive of the town's current retail inventory and hierarchy.

The overall spending profile is healthy, though opportunities are somewhat limited because of slow growth, requiring an approach that should entail stronger penetration of the existing market rather than focusing on new growth, just for growth's sake.

Regardless of where residents spend their money, realizing that some spending will occur in Athabasca as well as in Edmonton, Cold Lake, Fort Saskatchewan or Online, the Top 5 retail spending categories for the County's Trade Area are:

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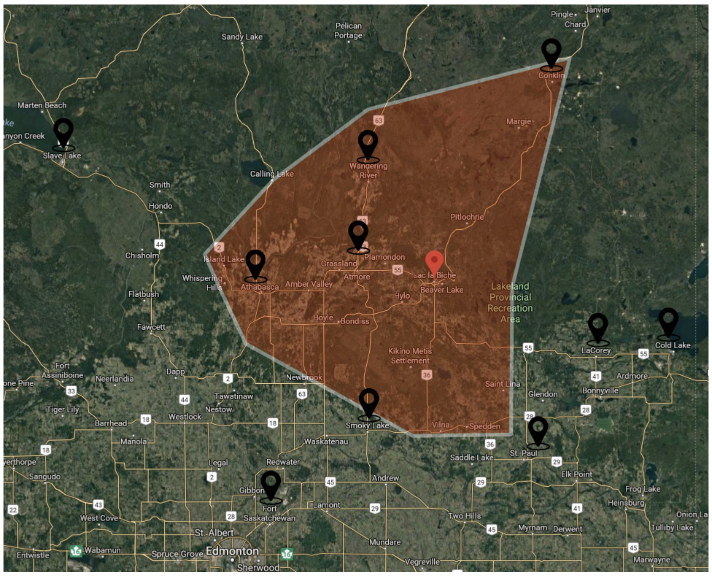

1. *Grocery & Specialty Foods - $135.5Million*
2. *Auto/RV/Motorsport - $75.2 Million*
3. *Home & Personal Electronics - $40.8 Million*
3. *Clothing, Footwear & Accessories - $30.5 Million*
4. *Restaurants (Full & Quick Service) - $25.9 Million*
5. *Home Furnishings & Improvement- $26.1 Million*

RETAIL SUPPLY

The County's retail market (including Hamlets of Lac La Biche and Plamondon) has an estimated street front floor space of approximately 582,562 sf. When excluding businesses that are not retail related but do occupy retail street front spaces, the total inventory is an estimated 414,112 sf.

A breakdown of Lac La Biche and Plamondon's retail inventory by category illustrates the Top 5 retail categories (excluding Auto) in terms of overall retail floor space are:

1. *Grocery & Specialty Foods 101,958 sf*
2. *Home Improvement & Garden 61,261 sf*
3. *Full Service Restaurants 37,800 sf*
4. *Clothing & Apparel 22,765 sf*
5. *Alcohol & Tobacco 21,670 sf*

The current overall vacancy rate is estimated at 17% which is high, but this includes two larger vacancies; former Ford Dealership and former RONA home improvement warehouse. When excluding these 2 larger formats, the vacancy drops to 6.9%, which for the Hamlet of Lac La Biche is considered favourable.

Despite the high vacancy overall, the implications of vacancy (buildings and land) are two-fold.

Firstly, the opportunity may exist to attract businesses into existing vacant spaces or land that could have lower rent costs applied and as a result may be more attractive to local businesses who may not have the sales productivity to justify higher rents. In particular, a missing brand in the community is Canadian Tire and either of the 2 vacant locations (Ford Dealership or RONA) would be compatible for a format like Canadian Tire. The former RONA site in particular would be highly beneficial for the community and the Downtown given its location. It must however be stated, that for this location to truly be valuable, an at-grade rail crossing must be put in place that extends from 101st St. Not only would this make the former RONA site accessible, but it would provide great benefit for Downtown businesses in keeping patrons and spending in the Downtown.
Secondly, any new development should be very targeted for uses that have the ability to create benefit for the greater good rather than impacting existing businesses.

As noted, retail opportunities exist for new-to-market tenants in spaces that are ready to occupy and in many cases are of a standard appropriate and conducive to basic tenant improvements. This downtown area should be a marketing priority and represent the best opportunity to attract new retail to the community.

EXECUTIVE SUMMARY

New development or redevelopment could be identified at vacant lots or older properties along the 101st Avenue corridor.

The retail inventory in terms of floor space and vacancies suggest that demand may not be robust, but that the County should be very targeted in its approach to obtaining the most compatible retail businesses to fit within the Lac La Biche's existing vacant spaces or land fronting or visible to/from Hwy 55 at the gateway to the downtown.

Lac La Biche's downtown will be susceptible to future retail growth in the periphery and with current vacancies levels in the downtown caution should be exercised to make sure that businesses and vacancies in the downtown are promoted to best degree possible.

This is yet another reason that the County should review its current allocation and locations for commercial land for the future to make sure that development is directed in the most appropriate areas in terms of scale and impact.

Much of the future demand and tenant prospects are likely to be of a branded nature and by virtue of their site selection requirements, they will be looking for tenant ready spaces or new development.

TOTAL	582,562	
TOTAL Retail Only	414,112	
VACANT	69,820	sq. ft.
% VACANT	16.9%	
Retail Space Per Capita (against COUNTY Population)	47.9	sq.ft./capita
Retail Space Per Capita (against Trade Area Population)	15.5	sq.ft./capita

TELEPHONE SURVEY RESULTS

A telephone consumer survey of 200 respondents sought to understand how the residents spend their money inside the County, outside the County and online.

Spending Inside Lac La Biche County

Overall retention of retail spending is low for most categories across the board, with a total average retention of only 34%. This means outflow is considerable for the community. According to the telephone survey respondents, 32% identified the Town of Athabasca as their primary shopping location, which is high. A community of Lac La Biche County's size, with its trade area reach should strive for a market share of 40% to 45% within which conveniences should be at or above 60% - 70%, which would be 10% - 20% higher than current levels.

Arguably, the introduction of a WalMart and/or Canadian Tire would be a notable catalyst to not just greater retention of local resident spending, but also greater attraction of new spending that otherwise would not occur in the community. Similarly, the these particular brands could also help to increase the market size and penetration for spending on Home Furnishings and Appliances.

The low rate of local sales retention should be a focus of attention to ensure that local businesses can garner more support by the local trade area within the County itself.

Spending Inside Lac La Biche County

When respondents were asked to identify their primary reasons for shopping outside of the County, the top rationale provided were that it is easier to commute to other destinations where there is a better selection including stores that aren't in the County.

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These comments most frequently pertain to the Town Athabasca and City of Fort Saskatchewan.

Online Spending

While the national trend towards increased online spending continues to gain momentum, the fact that 12% of survey respondents spent between 5% to 10% of their spending online is a noticeable market share trend that more than likely validates the rationale identified for store selection or product variety, when those types of stores aren't available in the County.

It will be difficult for the County to curb its online sales trend as many of the store types consumers are using either don't have a physical bricks and mortar location or it is a brand for whom Lac La Biche or Plamondon is not a target. The reality is that local businesses could expand their online capacity and/or have a location that allows for the expedience and access to central pick up.

RETAIL DEMAND

By 2023, the County could support incremental new retail space of 47,939 sf resulting in a cumulative demand (including 2018 residual space) of 203,967 sf. In terms of land requirements, this amount of retail space would conservatively require 18.7 acres, most of which would be in Lac La Biche.
If the retained market shares in this scenario were to increase by 5%, the total demand by the year 2023, without new population growth, but with spending growth and increased retention could result in incremental new space of approximately 81,350 sf.

By 2028, the County could support total 10-year incremental new 99,5820 sf resulting in a cumulative demand (including 2018 residual space) of 255,610 sf. In terms of land requirements, this amount of retail space would conservatively require 23.5 acres.

If the retained market shares were to increase and be maintained at 5%, the total demand by the year 2028, without new population growth, but with spending growth and increased retention could result in incremental new space of approximately 135,576 sf.

Part of the overall demand in the County is not premised on providing new retail space since the current vacancy should be addressed as there are some well-positioned assets available for tenancies. The reality is that demand may only result in a few specifically targeted new businesses. The goal should also be to ensure that existing businesses can increase their market share and resulting sales and profitability rather than adding new space to further dilute what exists today.

Retail demand forecasts suggest there is not overwhelming demand for future retail, but there are tenants capable of improving sales retention and attraction in the County. Most notably, these include WalMart and Canadian Tire.

Lac La Biche would be in a position to support these larger tenants, though there would likely be an impact on specific downtown retailers. This is cautionary note that speaks to ensuring that if such tenants are pursued, that they should be located as close as possible to the downtown rather than in a greenfield site at the southern periphery.

Lac La Biche would be better served by promoting compact and clustered commercial growth. Future land needs at approximately 25 acres is much less that the amount of land currently zoned in the community, which should be reviewed to avoid unnecessary and incompatible growth.


Welcome to
LAC LA
BICHE
GATEWAY TO
LAKELAND PROVINCIAL PARK

1 Introduction

1.1
SCOPE OF STUDY & PROJECT BACKGROUND

Key Planning Strategies (Key Planning) was commissioned by Lac La Biche County ("the County") in partnership with MDB Insight (MDB) to conduct a Retail Gap Analysis for the County. The objective of this study is to thoroughly document the County's current retail inventory and define the realistic or optimal retail Trade Area area for which it serves. The end result is to fill gaps and bolster the retail market it serves by retaining or attracting greater market share of resident and regional visitors' spending in the community and identifying gaps therein.

1.2
REPORT STRUCTURE

Key Planning conducted on-the-ground research in January 2019 to gain a firm understanding of existing and future retail prospects in the County. The purpose of this research was to establish a solid foundation and baseline for determining the depth of retail opportunity, associated 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 Hamlet of Lac La Biche ("Lac La Biche") as well as to a lesser degree, the Hamlet of Plamondon ("Plamondon") in terms of geographic location, regional access and traffic counts.

Section 3 - Retail Trade Area Profile:
Identifies and defines as well as its Primary Retail Trade Area, and documents the population and expenditure profiles, against which estimates of current and future floorspace demand can be estimated.

Section 4 - Retail Supply:
Assesses the location and characteristics of the County's current nodes of retail activity ("supply") in Lac La Biche and Plamondon, including developing or future planned retail sites. Fieldwork assessments included identifying and quantifying the entire Lac La Biche and Plamondon retail inventory by retailer, merchandise category and NAICS classification.

Section 5 – Consumer Survey:
Undertake a Telephone Survey with 150 residents of Lac La Biche County, Athabasca County and Smoky Lake County, as well as a separate Online Survey to ascertain retail spending and shopping preferences and how these impact demand and opportunities.

Section 6 – Retail Demand:
Quantifies the Trade Area spending and sales productivities, resulting in "demand" associated with each retail category over the next 5 and 10 years for the County. Demand estimates are applied against market shares, spending growth and population to gauge future demand and corresponding land requirements.

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 largely comprising primary and secondary research.

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

- Alberta Ministry of Transportation, Highways 1 to 986 Traffic Volume History 2018
- Key Planning Strategies Detailed Retail Inventory Fieldwork, September 2018.
- Manifold Data Mining Inc., Demographics & Spending Data, 2018.
- Conversations with selected local businesses.

2 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 County's regional and local characteristics as they relate to the attraction and retention of retail businesses and merchandise categories in Lac La Biche or Plamondon.

2.2
LOCAL & REGIONAL CONTEXT

Lac La Biche is located approximately 2 hour drive time northeast of the City of Fort Saskatchewan. Referring to **Figure 2.1**, Lac La Biche represents a key centrality within a region for which drive times of 30, 60 and 90-minutes emanate. These drive times are critical to supporting a strong retail market. Most notably, Lac La Biche services a 60-minute drive time west/northwest, 75 minutes drive time south/southeast and a 90-minute drive time north/northeast.

From a retail commercial perspective, Lac La Biche encourages commercial development in the Downtown along 101st Avenue as well as along the Highway 55 east-west corridor on the west side of town. Recently, commercial growth in the form of hotels and potential development has been observed at the Highway 55 Bypass at the junction of Route 881 south. In addition to new retail lands being made available for commercial development at the west and south ends of the community, Lac La Biche has an important centrally located downtown core that runs predominantly along 101st Avenue between 105th St and 100th St.

While retail nodes on the periphery may provide retail opportunities for new-to-market larger formats, the downtown provides a focal point for local shops as well as personal and professional services. There are available lands and/or buildings in close proximity of the Downtown that are available for acquisition and would benefit the Downtown and overall community more appropriately than perpetuating further outward, and somewhat unnecessary development on the fringes of Lac La Biche.

In general, the County plays a key role along the regional highway corridor as a pit-stop between the communities of Cold Lake and St Paul to the east and southeast respectively and Fort McMurray and Athabasca to the north east and east respectively.

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 secondary market such as Lac La Biche, a retail location relative to strong and accessible transportation patterns remains an important component. This may be slightly less essential for a local independent business, but nonetheless is important when hamlets like Lac La Biche or Plamondon strives to position themselves within the local/regional context and compete against other communities, namely Athabasca for retail dollars.

Figure 2.1

LAC LA BICHE REGIONAL DRIVE TIMES

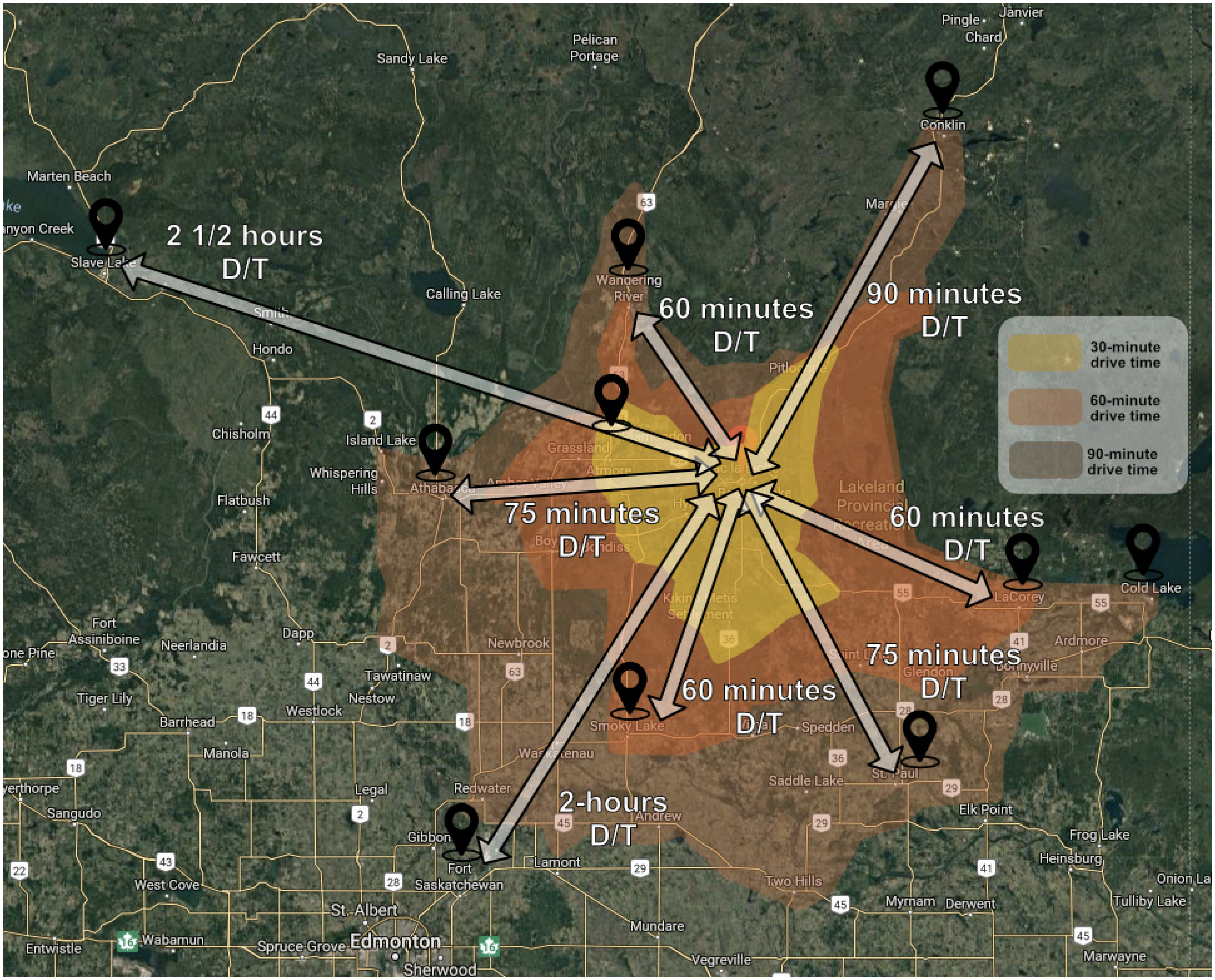
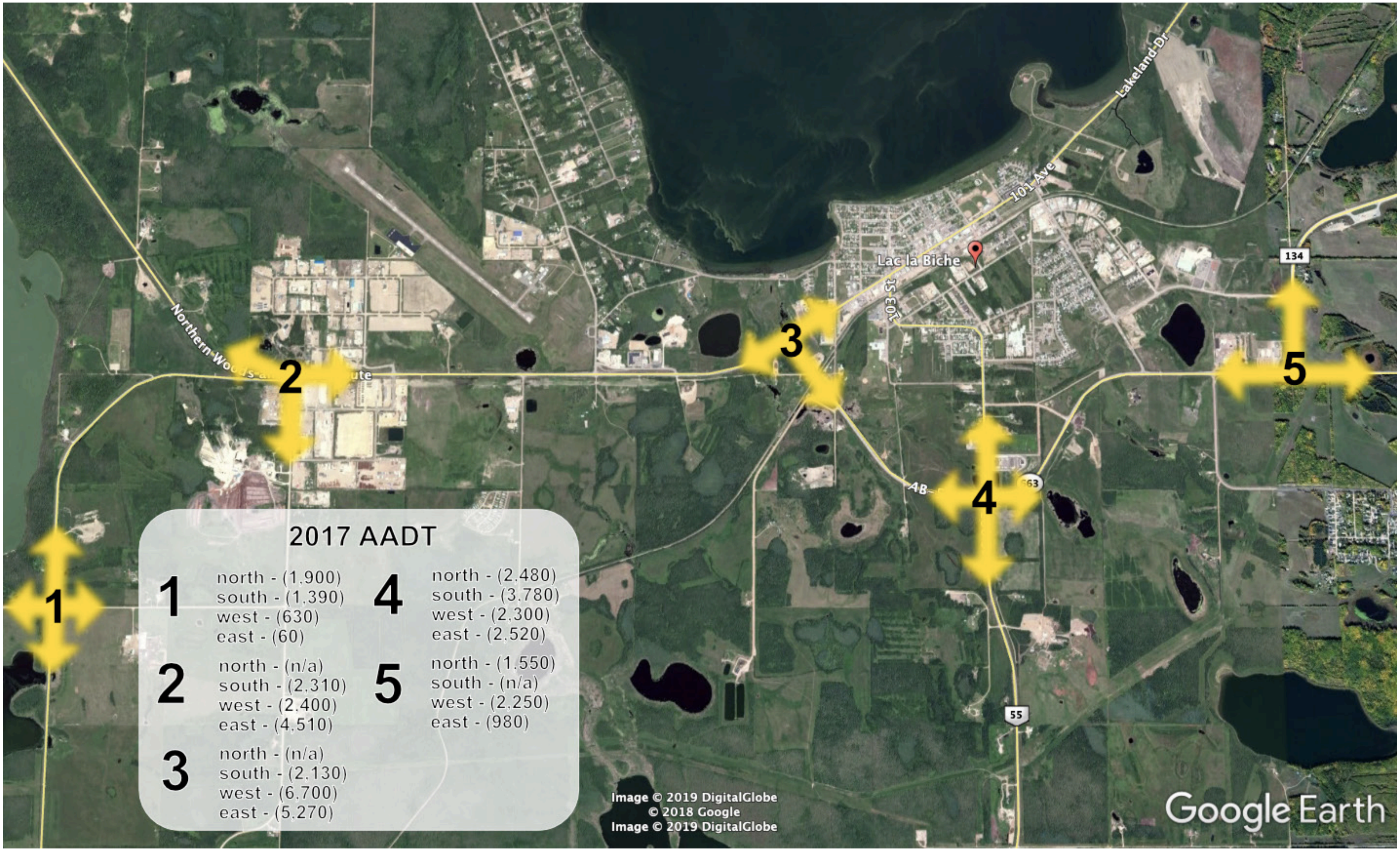


Figure 2.2
LAC LA BICHE LOCAL AADT TRAFFIC COUNTS
(Source: Alberta Transportation 2017)



The Alberta Ministry of Transportation provides detailed traffic counts on major highways and junction points. The most recent 2018 data documented in the form of Average Annual Daily Traffic (AADT) from this Provincial source is shown in **Figure 2.2** and as follows:

1) Hwy 663 & Township Rd 665

North on Hwy 663 = 1,900
South on Hwy 663 = 1,390
West on Rd 665 = 630
East on Rd 665 = 60

This is one of the primary highways that connects to the smaller towns/hamlets of Hylo, Caslan, Bondiss, as well as the Buffalo Lake Metis Settlement

2) Junction of Hwy 55 & Hwy 663

West on Hwy 55 = 2,400
South on Hwy 663 = 2,310
East on Hwy 55 = 4,510

This junction along Hwy 55 connects directly into the downtown commercial area to the east and also connects to the Hamlet of Plamondon in the west via a 25-minute drive time.

3) Junction of Hwy 55 Bypass & 101st Ave

South on Hwy 55 Bypass = 2,130
West on 101st Ave = 6,700
East on 101st Ave = 5,270

For local businesses the current traffic volume accessing the downtown area and core shopping and services district is relatively convenient and healthy in Lac La Biche. This junction point is the location of the highest traffic counts in the community and is likely to be the most desirable for new-to-market businesses in the community.

The accessibility and proximity to the Downtown is also beneficial at this location as a node for future growth.

4) Hwy 55 Bypass & Hwy 881 (east)

North on Hwy 55 = 2,480
South on Hwy 55 = 3,780
West on Hwy 55 = 2,300
East on Hwy 881 = 2,520

This junction is the location of a recent hotel cluster targeting traveling motorists. As a retail centric location it does not benefit from the traffic counts that location #3 has, and from a commercial perspective is considered remote from the commercial core.

5) Hwy 881 & Hwy 663

North on Hwy 881 = 1,550
East on Hwy 663 = 980
West on Hwy 881 = 2,250

Traffic counts are important considerations for retailers and in particular branded or chain retailers. However it will be very important to other higher profile tenants and/or developers to have high visibility to/from passing motorist traffic along Hwy 55 as they pass through Lac La Biche Lower speed limits along Hwy 16A/50th Ave through the centre of town are essential to enabling strong visibility.

Vacant parcels or buildings fronting Hwy 55, particularly at the east and west sides of town may represent strategic infill opportunities for higher profile tenants to whom driving regional motorists are a target consumer. The clustering near the Bold Recreational Centre at the Beaverhill development or in the west adjacent to the Independent Grocer should be the lands zoned for commercial for future growth.

Photo courtesy of Key Planning Strategies

3 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 County'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 primarily to the Hamlet of Lac La Biche as the retail centrality of the County to determine its most realistic Trade Area, as well as to help sensitize potential market share inputs of corresponding Trade Area retail spending. A further layer to the Trade Area was undertaken by utilizing Telephone and Online Consumer Surveys as documented in Section 5.

Retail Trade Area Determinants

i. Transportation networks, including streets and highways, which affect access, drive times (refer to **Figure 2.2**), 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. 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);

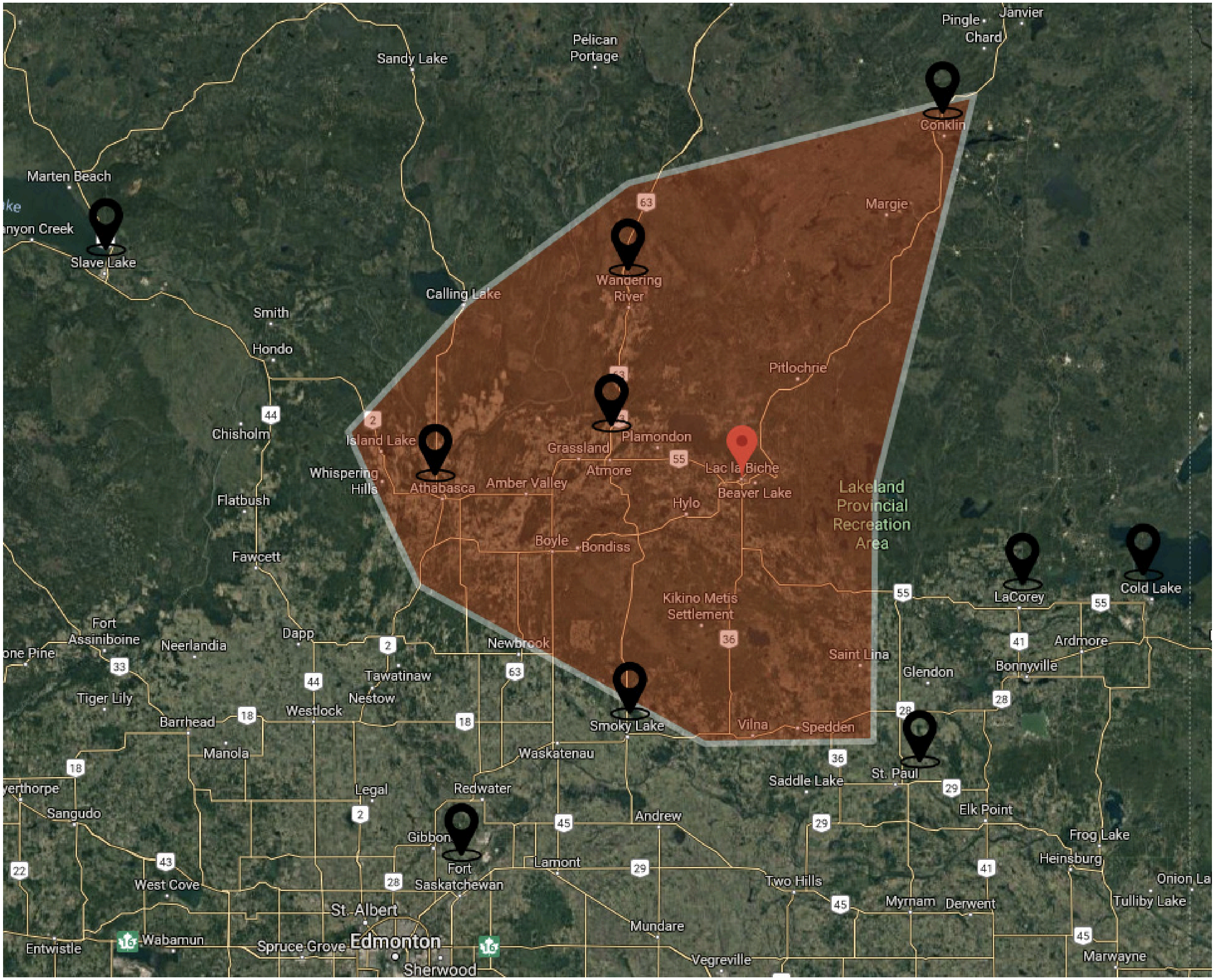
vii. De facto barriers resulting from notable socioeconomic differentiation;

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

For this particular study, the Retail Trade Area shown in **Figure 3.1** utilized a combination of drive times and competitive forces, namely Athabasca, Cold Lake and St. Pauls. Consequently the trade area is skewed in a north-northeast orientation, largely because of the competitive influence that Athabasca plays in the regional marketplace (refer to Consumer Survey results).

Figure 3.1

LAC LA BICHE RETAIL TRADE AREA



Athabasca's drive time from Lac La Biche is estimated at around 75 minutes and since Athabasca has a Canadian Tire, it is a draw for the County consumer. Athabasca is a strong competitor because it is positioned at the centrality of two independent Trade Areas (Slave Lake and the County).

However, on the flip side, the County has desired shops and services that draw consumers from the smaller populated Athabasca area. Additionally, given some of the winter and seasonality travel issues, it is important nonetheless for the County to ensure it has a strong base for shops and services in its own identified trading region. Needless to say, there will be some overlap between Lac La Biche's Trade Area and Athabasca's, but this is normal given the geography and seasonality aspects of the region as a whole.

For the County, drive times are the single biggest factor in the determination of the retail Trade Area.

3.2 POPULATION PROJECTIONS

Using data sources that include the most recent Statistics Canada Census release as well as Manifold Data Mining Inc. (2017), population estimates and growth forecasts were tabulated for each of the identified Trade Areas.

The County's most recent census data from the February 2017 Statistics Canada release revealed a population of 8,330 in 2016. The County will be completing a municipal census between April 17 and June 30, 2019.

Utilizing a trade area approach as shown in **Figure 3.1** and documented in **Tables 3.1 to 3.4** provides a more accurate depiction of the Total Trade Area for the County's retail environment rather than being solely dependent upon the smaller localized population base.

To that end, **Tables 3.1 & 3.2** provide a breakdown of the Trade Area Population and one that is much more appealing to the business community.

The Total Trade Area population is estimated for year end 2017 to be just under 27,000 (26,645). This population is forecast to surpass 29,000 (29,139) by 2027.

It is realistic for the County to focus on Lac La Biche's existing Trade Area, but also harness its strategic location along Hwy 55 to serve as an ideal pit stop for passing motorists and other target users, particularly at the junction of Hwy 55 and 101st Avenue.

The Trade Area population growth dynamics do not exhibit strong projected growth, which suggests that focus should be on diligently attracting the types of retail that would benefit the community and target the latter noted highway motorists. While the County is forecast to maintain its current population (pending the results of the upcoming Municipal Census), the overall trade area is forecast to grow at 0.7% to 1.0% per annum over the next decade, compared to the City of Edmonton benchmark which is a minimum of 2.6% over the same period.

Table 3.1

TRADE AREA DEMOGRAPHIC SUMMARY

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

Attribute	Benchmark Edmonton (CMA/CA,AB)		Lac La Biche Retail Trade Area			Lac La Biche Drive Times 30 Minutes			Lac La Biche Drive Times 60 Minutes			Lac La Biche Drive Times 90 Minutes			Lac la Biche County (CSD,AB)		
	value	percent	value	percent	index	value	percent	index	value	percent	index	value	percent	index	value	percent	index
Summary																	
SUMMARY																	
Total population	1,410,520		26,645			7,816			9,892			29,120			8,648		
Total number of private households	533,282		9,857			2,727			3,468			10,920			3,213		
Average number of persons in private households	2.60		2.58		99	2.76		106	2.75		106	2.54		98	2.62		101
POPULATION AGE																	
Percent: population age 0-14	257,406	18.25%	4,292	16.11%	88	1,409	18.02%	99	1,720	17.39%	95	4,553	15.64%	86	1,565	18.09%	99
Percent: population age 15-24	159,882	11.34%	3,794	14.24%	126	1,217	15.57%	137	1,547	15.64%	138	4,008	13.76%	121	1,311	15.16%	134
Percent: population age 25-34	214,427	15.20%	2,939	11.03%	73	952	12.18%	80	1,182	11.95%	79	3,114	10.69%	70	1,067	12.34%	81
Percent: population age 35-44	209,942	14.88%	3,046	11.43%	77	926	11.85%	80	1,126	11.39%	77	3,264	11.21%	75	1,022	11.81%	79
Percent: population age 45-54	195,554	13.86%	3,536	13.27%	96	1,080	13.82%	100	1,373	13.88%	100	3,828	13.15%	95	1,218	14.08%	102
Percent: population age 55-64	184,454	13.08%	3,820	14.34%	110	1,036	13.25%	101	1,346	13.61%	104	4,270	14.66%	112	1,163	13.45%	103
Percent: population age 65+	188,854	13.39%	5,216	19.58%	146	1,196	15.30%	114	1,597	16.15%	121	6,083	20.89%	156	1,303	15.06%	112
DWELLING																	
Total number of occupied private dwellings	533,282		9,857			2,727			3,468			10,920			3,213		
Average dwelling value $	$521,634		$361,664		69	$425,959		82	$427,157		82	$349,877		67	$474,116		91
Percent: home owners	386,421	72.46%	7,429	75.37%	104	2,084	76.41%	105	2,751	79.33%	109	8,341	76.39%	105	2,477	77.10%	106
Percent: home tenants	145,815	27.34%	2,138	21.69%	79	599	21.97%	80	673	19.40%	71	2,294	21.00%	77	736	22.90%	84
Percent: band housing	1,045	0.20%	290	2.94%	1,470	44	1.62%	810	44	1.27%	635	285	2.61%	1,305	0	0.00%	0
EDUCATION																	
Total population aged 15 years and over by highest certificate, diploma or degree	1,153,120		22,352			6,407			8,172			24,567			7,084		
No certificate, diploma or degree	210,098	18.22%	6,466	28.93%	159	1,923	30.01%	165	2,569	31.44%	173	7,106	28.93%	159	2,132	30.09%	165
High school diploma or equivalent	300,214	26.04%	5,841	26.13%	100	1,442	22.50%	86	1,843	22.56%	87	6,436	26.20%	101	1,521	21.47%	82
Postsecondary certificate, diploma or degree	642,817	55.75%	10,045	44.94%	81	3,043	47.49%	85	3,759	46.00%	83	11,026	44.88%	81	3,431	48.44%	87
Apprenticeship or trades certificate or diploma	124,191	10.77%	3,042	13.61%	126	954	14.89%	138	1,201	14.70%	136	3,385	13.78%	128	945	13.34%	124
College, CEGEP or other non-university certificate or diploma	215,979	18.73%	4,449	19.90%	106	1,272	19.85%	106	1,616	19.77%	106	4,822	19.63%	105	1,454	20.52%	110
University certificate or diploma below bachelor level	52,052	4.51%	651	2.91%	65	172	2.69%	60	220	2.69%	60	716	2.91%	65	184	2.60%	58
University certificate, diploma or degree at bachelor level or above	250,584	21.73%	1,903	8.51%	39	645	10.07%	46	722	8.84%	41	2,103	8.56%	39	849	11.98%	55
Bachelor degree	169,900	14.73%	1,211	5.42%	37	487	7.61%	52	539	6.60%	45	1,369	5.57%	38	675	9.53%	65
University certificate, diploma or degree above bachelor level	80,684	7.00%	692	3.09%	44	158	2.47%	35	183	2.24%	32	733	2.99%	43	174	2.45%	35

Note: This report is based on consumer demographic and behavior data products at the 6-digit postal code level. No confidential information about an individual, household, organization or business has been obtained from Statistics Canada or Numeris.

Index	Description
>=180	Extremely High
>=110 and <180	High
>=90 and <110	Similar
>=50 and <90	Lower
<50	Extremely Low

Table 3.2

TRADE AREA POPULATION PROJECTIONS SUMMARY 2017 TO 2027

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

Attribute	Benchmark Edmonton (CMA/CA,AB)		Lac La Biche Retail Trade Area			Lac La Biche Drive Times 30 Minutes			Lac La Biche Drive Times 60 Minutes			Lac La Biche Drive Times 90 Minutes			Lac la Biche County (CSD,AB)		
	value	percent	value	percent	index	value	percent	index	value	percent	index	value	percent	index	value	percent	index
Summary																	
PROJECTIONS																	
Annual population growth in the period: 2017 to 2022		2.56%		0.69%	27		-1.06%	-41		-0.74%	-29		0.62%	24		-0.15%	-6
Annual household growth in the period: 2017 to 2022		2.08%		0.36%	17		-1.26%	-61		-0.90%	-43		0.28%	13		0.54%	26
Annual population growth in the period: 2022 to 2027		2.53%		1.02%	40		-0.51%	-20		-0.22%	-9		0.96%	38		-0.15%	-6
Annual household growth in the period: 2022 to 2027		2.06%		0.64%	31		-0.81%	-39		-0.48%	-23		0.57%	28		0.50%	24
POPULATION GROWTH																	
2017 Total population	1,410,520		26,645			7,816			9,892			29,120			8,648		
2022 Total population	1,604,500		27,649			7,410			9,539			30,116			8,584		
2027 Total population	1,822,070		29,139			7,224			9,439			31,647			8,521		
HOUSEHOLD GROWTH																	
2017 Total number of households	533,282		9,857			2,727			3,468			10,920			3,213		
2022 Total number of households	592,456		10,059			2,560			3,318			11,098			3,302		
2027 Total number of households	657,608		10,405			2,458			3,241			11,437			3,387		

Efforts should be focused on trying to increase the existing market penetration for sustaining existing business vitality and for ensuring proper business succession planning. By increasing market share of existing trade area spending, businesses will rally behind a stronger market penetration for business viability and stability. Retailers in Lac La Biche such as Warehouse One, among others would benefit from a stronger market penetration of the existing market, as opposed to expanding the current market.

As will be documented in the Demand Section, even if some small component of demand could be warranted, the alternative to demand is that individual businesses could garner higher market share resulting in greater sales and thus business viability, rather than simply adding more space. For those very specific niche uses that could fit, the County has specific locations that are well-suited to accommodate them.

The strategic Hwy 55 junction point at 101st Ave is the one location in Lac La Biche that could or should be further exploited as one of the key locations capable of not just slowing motorists, but stopping them. Highway motorists are creatures of habit who tend to stay in their vehicles unless the environment is convenient for them to stop; Lac La Biche has this potential.

3.3
AGE PROFILE

A summary of the current age profile, as documented in **Table 3.3 and Figure 3.2** reveal a slightly older family profile. In total, the median age is 41.1 years of age, with a dominant age group less than 20 years, which suggest an emerging young formative family stage, which itself has needs for retail shops and services that include toys, hobbies, children's apparel and footwear.

At the same time, **Table 3.2** reveals that 42% of the Trade Area's population is currently over the age of 50 years. This age cohort is typically not the strongest spending segment, though they are very supportive of local businesses and local spending. They are also not a significant cohort when it comes to restaurant spending, but they do support grocery and have a tendency to eat at home.

3.4
HOUSEHOLD INCOME PROFILE

Household incomes are among the most direct determinants in identifying patterns of spending and potential thereof for retail, food & beverage, entertainment and services.

A summary of the current average Household Income in the Retail Trade Area as documented in **Table 3.4 and Figure 3.3,** reveals an average Household Income in 2017 estimated at just over $101,000 ($101,358) in the County Trade Area, which is very strong. Although these incomes are lower than the City of Edmonton benchmark average of $129,671(2017), the cost of living in the County is much lower and thus the disposable income levels are likely very strong. This however, should be tempered by a market that does exhibit higher product costs, particularly conveniences.

Figure 3.3 illustrates that approximately 36% of households have an average Household Income of more than $100,000. Compared to other communities in the region this is quite high. As a comparison, Vegreville's Trade Area has 24% of the households earing above $100,000.

Table 3.3

TRADE AREA POPULATION AGE BREAKDOWN

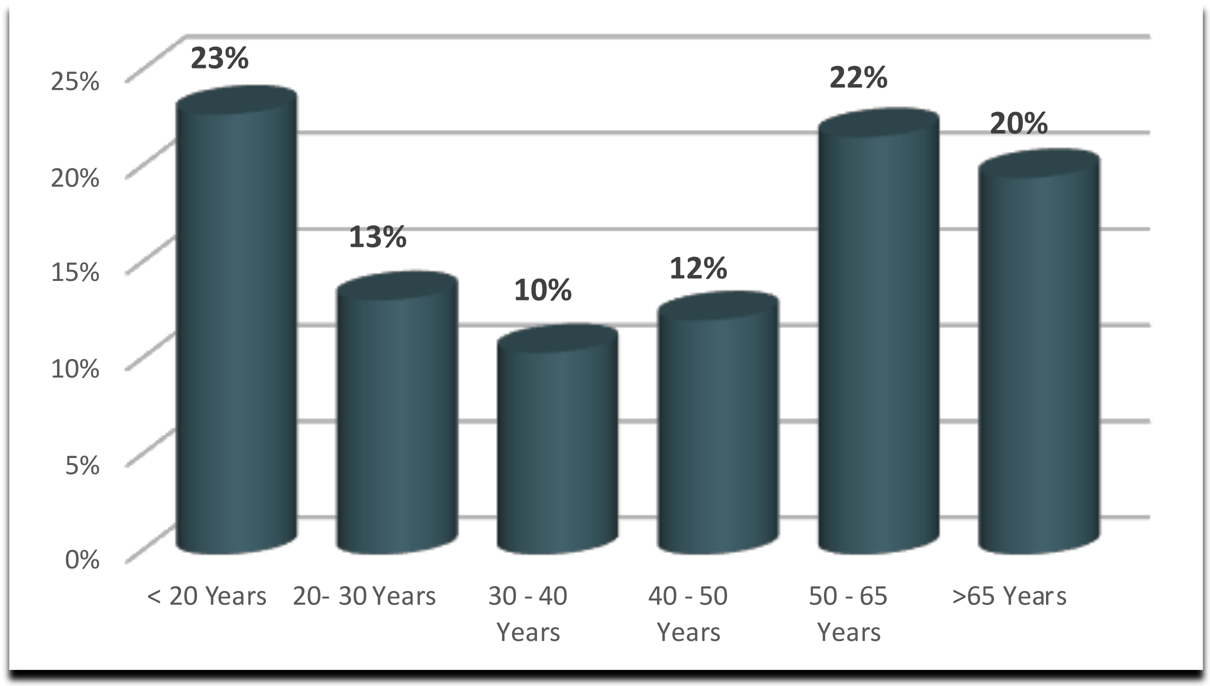
(Source: Manifold Data Mining Inc and Key Planning Strategies)

Attribute	Benchmark Edmonton (CMA/CA,AB)		Lac La Biche Retail Trade Area			Lac La Biche Drive Times 30 Minutes			Lac La Biche Drive Times 60 Minutes			Lac La Biche Drive Times 90 Minutes			Lac la Biche County (CSD,AB)		
	value	percent	value	percent	index	value	percent	index	value	percent	index	value	percent	index	value	percent	index
Summary																	
SEX AND AGE GROUP																	
Total population by sex and age groups	1,410,520		26,645			7,816			9,892			29,120			8,648		
0-4	86,733	6.15%	1,244	4.67%	76	408	5.22%	85	497	5.02%	82	1,324	4.55%	74	453	5.24%	85
05-09	90,668	6.43%	1,503	5.64%	88	478	6.11%	95	574	5.80%	90	1,581	5.43%	84	533	6.16%	96
10-14	80,005	5.67%	1,546	5.80%	102	523	6.69%	118	649	6.57%	116	1,648	5.66%	100	578	6.69%	118
15-19	76,196	5.40%	1,801	6.76%	125	573	7.33%	136	723	7.31%	135	1,909	6.56%	121	613	7.09%	131
20-24	83,686	5.93%	1,993	7.48%	126	645	8.25%	139	824	8.33%	140	2,098	7.21%	122	698	8.08%	136
25-29	100,302	7.11%	1,526	5.73%	81	483	6.18%	87	612	6.18%	87	1,605	5.51%	77	537	6.21%	87
30-34	114,125	8.09%	1,413	5.30%	66	469	6.00%	74	571	5.77%	71	1,508	5.18%	64	530	6.13%	76
35-39	110,486	7.83%	1,380	5.18%	66	470	6.01%	77	553	5.59%	71	1,474	5.06%	65	514	5.94%	76
40-44	99,456	7.05%	1,666	6.25%	89	457	5.84%	83	573	5.80%	82	1,790	6.15%	87	508	5.87%	83
45-49	95,817	6.79%	1,578	5.92%	87	496	6.35%	94	620	6.26%	92	1,720	5.91%	87	565	6.53%	96
50-54	99,738	7.07%	1,958	7.35%	104	584	7.47%	106	753	7.61%	108	2,108	7.24%	102	653	7.55%	107
55-59	99,413	7.05%	1,968	7.39%	105	540	6.91%	98	709	7.16%	102	2,183	7.50%	106	597	6.91%	98
60-64	85,040	6.03%	1,852	6.95%	115	496	6.34%	105	638	6.44%	107	2,088	7.17%	119	565	6.54%	108
65-69	65,251	4.63%	1,654	6.21%	134	395	5.06%	109	520	5.26%	114	1,870	6.42%	139	445	5.15%	111
70-74	45,955	3.26%	1,372	5.15%	158	339	4.34%	133	462	4.67%	143	1,567	5.38%	165	350	4.05%	124
75-79	31,187	2.21%	890	3.34%	151	210	2.68%	121	282	2.85%	129	1,061	3.65%	165	227	2.63%	119
80-84	22,582	1.60%	659	2.47%	154	132	1.69%	106	176	1.78%	111	803	2.76%	173	148	1.71%	107
85+	23,880	1.69%	641	2.40%	142	119	1.52%	90	157	1.58%	93	782	2.69%	159	132	1.53%	91
Median age of total population	37.40		41.10		110	38.20		102	39.10		105	42.30		113	38.00		102
Average age of total population	38.00		40.40		106	38.60		102	39.10		103	41.20		108	38.20		101

Figure 3.2

TRADE AREA POPULATION AGE BREAKDOWN

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



Index	Description
>=180	Extremely High
>=110 and <180	High
>=90 and <110	Similar
>=50 and <90	Lower
<50	Extremely Low

Table 3.4

TRADE AREA HOUSEHOLD INCOME BREAKDOWN

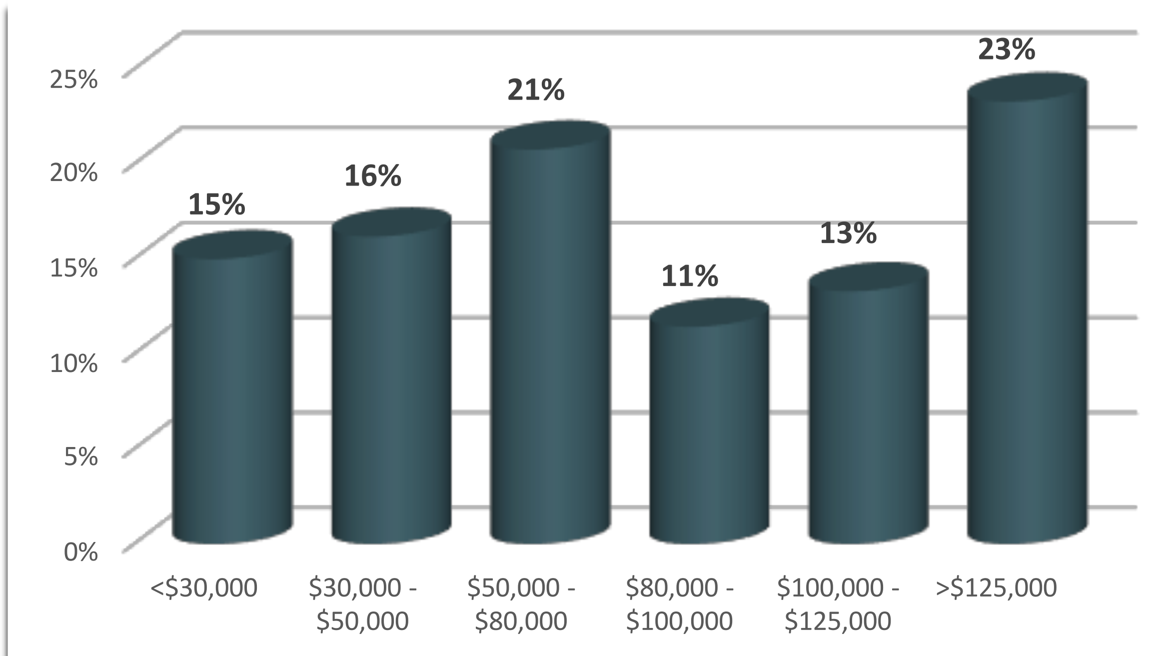
(Source: Manifold Data Mining Inc and Key Planning Strategies)

Attribute	Benchmark Edmonton (CMA/CA,AB)		Lac La Biche Retail Trade Area			Lac La Biche Drive Times 30 Minutes			Lac La Biche Drive Times 60 Minutes			Lac La Biche Drive Times 90 Minutes			Lac la Biche County (CSD,AB)		
	value	percent	value	percent	index	value	percent	index	value	percent	index	value	percent	index	value	percent	index
Summary																	
HOUSEHOLD INCOME																	
Total number of households	533,282		9,857			2,727			3,468			10,920			3,213		
Average household income $	$129,671		$101,358		78	$112,354		87	$110,558		85	$99,103		76	$127,604		98
Median houshold income $	$99,270		$91,121		92	$104,844		106	$99,982		101	$89,012		90	$102,615		103
Household with income $0 - $4,999	11,460	2.15%	106	1.07%	50	28	1.03%	48	43	1.23%	57	105	0.96%	45	32	1.00%	47
Household with income $5,000 - $9,999	8,666	1.63%	123	1.25%	77	34	1.23%	75	49	1.42%	87	142	1.30%	80	43	1.35%	83
Household with income $10,000 - $14,999	11,423	2.14%	220	2.23%	104	57	2.08%	97	81	2.33%	109	249	2.28%	107	58	1.80%	84
Household with income $15,000 - $19,999	15,860	2.97%	377	3.83%	129	82	3.01%	101	123	3.54%	119	429	3.93%	132	67	2.09%	70
Household with income $20,000 - $29,999	27,971	5.25%	652	6.62%	126	145	5.33%	102	190	5.47%	104	723	6.62%	126	153	4.76%	91
Household with income $30,000 - $39,999	33,485	6.28%	811	8.23%	131	203	7.45%	119	271	7.81%	124	929	8.51%	136	224	6.99%	111
Household with income $40,000 - $49,999	36,349	6.82%	784	7.96%	117	209	7.68%	113	276	7.97%	117	905	8.29%	122	265	8.26%	121
Household with income $50,000 - $59,999	39,628	7.43%	823	8.35%	112	254	9.31%	125	321	9.26%	125	941	8.62%	116	255	7.95%	107
Household with income $60,000 - $79,999	60,773	11.40%	1,224	12.42%	109	325	11.91%	104	427	12.33%	108	1,356	12.42%	109	322	10.04%	88
Household with income $80,000 - $99,999	63,621	11.93%	1,128	11.44%	96	334	12.25%	103	438	12.63%	106	1,232	11.28%	95	375	11.69%	98
Household with income $100,000 - $124,999	68,724	12.89%	1,312	13.31%	103	346	12.69%	98	430	12.39%	96	1,364	12.49%	97	391	12.17%	94
Household with income $125,000 - $149,999	56,251	10.55%	931	9.45%	90	290	10.64%	101	331	9.54%	90	1,003	9.19%	87	468	14.57%	138
Household with income $150,000 and over	99,078	18.58%	1,365	13.85%	75	419	15.38%	83	488	14.08%	76	1,541	14.11%	76	557	17.34%	93

Figure 3.3

TRADE AREA HOUSEHOLD INCOME BREAKDOWN

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



Index	Description
>=180	Extremely High
>=110 and <180	High
>=90 and <110	Similar
>=50 and <90	Lower
<50	Extremely Low

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 County.

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 or Department Store Type Merchandise (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 Manifold Data Mining Inc., a leading supplier of demographic and consumer expenditure information, using 2017 year end data and grown using an estimated 0.5% inflationary rate to estimate 2018 year end. 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.

Having established the Trade Area boundary, population and demographic profile, the size of the retail market and its anticipated growth was projected using retail spending data from Manifold Data Mining.

As illustrated in **Table 3.5**, the Total Trade Area is estimated at $380 Million (2018 year-end estimate). When excluding Auto Parts and Dealerships, this figure comes in at $305 million.

The County's share of the Total Trade Area spending is estimated at 38%, which illustrates the regional draw that is supportive of the town's current retail inventory and hierarchy.

The overall spending profile is healthy, though opportunities are somewhat limited because of slow growth, requiring an approach that should entail stronger penetration of the existing market rather than focusing on new growth, just for growth's sake.

Figures 3.5 and 3.6 illustrate the retail spending as summarized by the larger categorizations of Grocery & Conveniences, Comparison Merchandise (also know as Department Store Type Merchandise), Restaurants & Entertainment and Auto/RV/Motorsports Parts and Sales.

As shown in **Figure 3.6** and as is more common in rural or secondary markets, the share of spending on Grocery and Conveniences (36%) is high when compared to other segments, while the spending on Restaurants & Entertainment (11%) is comparable with more urban markets, although entertainment spending is most likely to occur in the Edmonton region.

Table 3.5

TRADE AREA RETAIL SPENDING (2018 year end estimate)

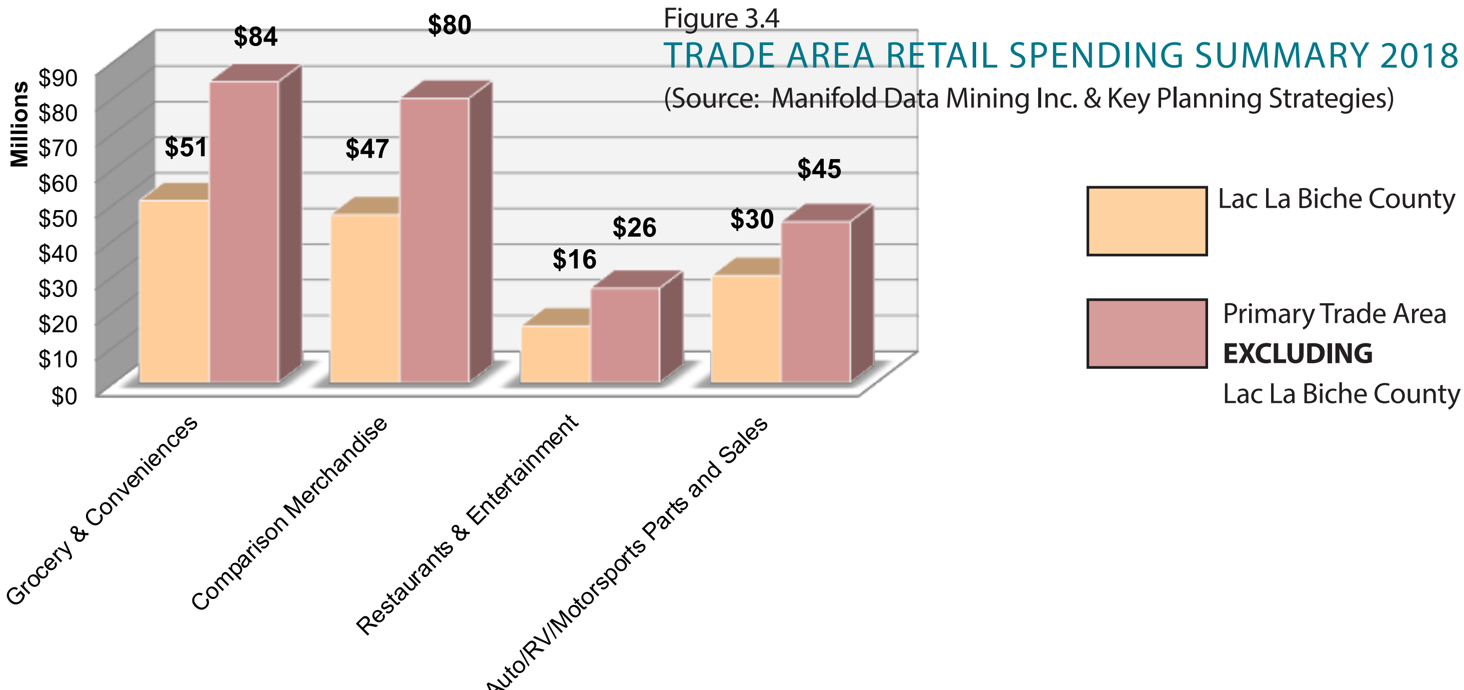
(Source: Manifold Data Mining Inc. & Key Planning Strategies)

Retail Spending by Merchandise Category	2018 Year End (estimate) Lac La Biche County Aggregate Retail Spending	PTA (excluding Lac La Biche County) Aggregate Retail Spending	TOTAL Trade Area Aggregate Retail Spending
Grocery & Specialty Foods	$37,683,189	$62,152,352	$99,835,540
Pharmacy	$3,251,668	$5,089,424	$8,341,092
Alcohol & Tobacco	$5,098,694	$8,888,981	$13,987,674
Personal Services	$5,056,716	$8,287,050	$13,343,766
Clothing & Apparel	$7,549,554	$12,332,360	$19,881,914
Footwear	$2,631,688	$4,272,993	$6,904,681
Jewelry & Accessories	$1,436,934	$2,317,548	$3,754,482
Health & Beauty	$2,806,057	$4,851,501	$7,657,558
Home Furnishings & Appliances	$4,252,679	$7,070,205	$11,322,884
Home & Personal Electronics	$15,370,349	$25,413,826	$40,784,175
Home Improvement & Gardening	$5,754,194	$9,075,515	$14,829,709
Books & Media	$2,722,102	$6,639,338	$9,361,439
Sporting Goods	$1,052,675	$1,988,554	$3,041,229
Toys & Hobbies	$1,269,023	$2,039,677	$3,308,699
Specialty Retail	$2,282,949	$3,819,323	$6,102,272
Quick Service F&B	$1,236,732	$2,141,311	$3,378,043
Full Service Restaurants	$8,524,732	$14,012,067	$22,536,798
Arts & Entertainment	$3,903,940	$6,636,348	$10,540,287
Drinking Establishments	$607,064	$1,027,473	$1,634,537
Fitness & Leisure	$1,640,365	$2,678,775	$4,319,140
Auto Parts & Accessories	$2,570,336	$4,106,500	$6,676,836
Auto/RV/Motorsports Dealership	$27,482,572	$41,049,107	$68,531,680
TOTAL CATEGORIES	**$144,184,210**	**$235,890,226**	**$380,074,437**
TOTAL (excluding Auto Parts & Accessories & Auto/RV/Motorsports Dealerships)	**$114,131,302**	**$190,734,618**	**$304,865,921**

Figure 3.4

TRADE AREA RETAIL SPENDING SUMMARY 2018

(Source: Manifold Data Mining Inc. & Key Planning Strategies)



As a comparison, recent studies for other Alberta communities such as the City of Grande Prairie and City of Chestermere have Grocery & Conveniences spending share at 31% and 32% respectively, while the spending on Restaurants & Entertainment are at 10% and 12% respectively.

Regardless of where residents spend their money, realizing that some spending will occur in Athabasca as well as in Edmonton, Cold Lake, Fort Saskatchewan or Online, the Top 5 retail spending categories for the County's Trade Area are:

1. *Grocery & Specialty Foods - $135.5Million*
2. *Auto/RV/Motorsport - $75.2 Million*
3. *Home & Personal Electronics - $40.8 Million*
3. *Clothing, Footwear & Accessories - $30.5 Million*
4. *Restaurants (Full & Quick Service) - $25.9 Million*
5. *Home Furnishings & Improvement- $26.1 Million*

Figure 3.5

TRADE AREA RETAIL SPENDING BY GENERAL CATEGORY

(Source: Manifold Data Mining Inc. & Key Planning Strategies)

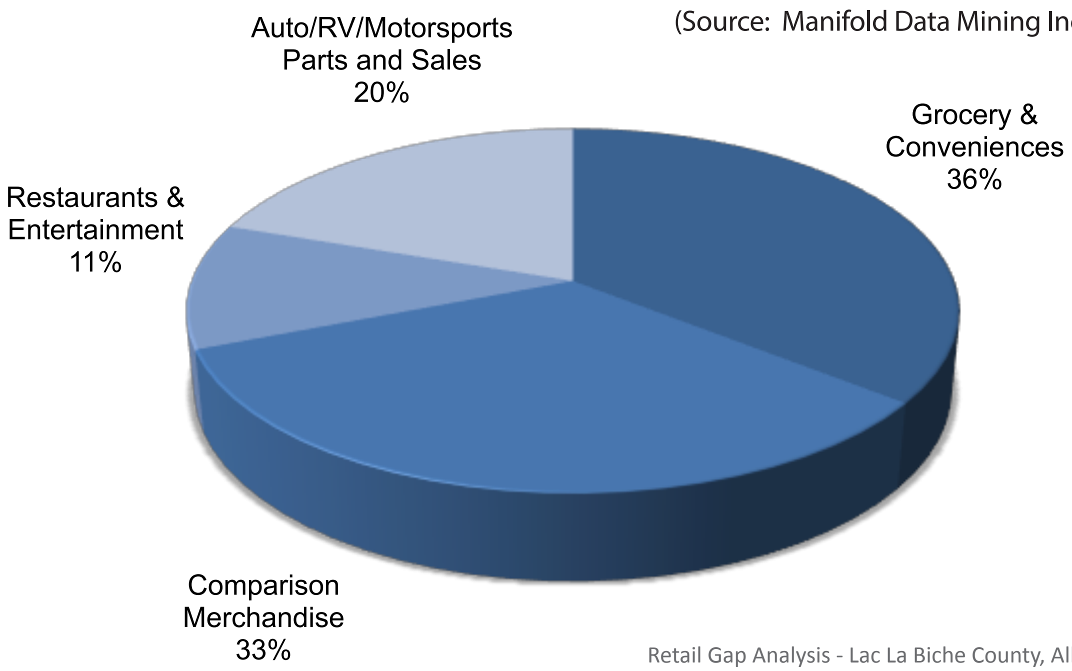


Photo courtesy of Key Planning Strategies

4 Retail Supply

4.1
INTRODUCTION

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

This section will provide a detailed inventory of the tenants that comprise the current retail market for the County, which serves as the core centrality for retail in the identified Trade Area. The focal point of this analysis is the Hamlets of Lac La Biche and Plamondon.

The purpose of the inventory evaluation is to 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 the County could be compatible.

4.2
COUNTY RETAIL MARKET

To document the retail inventory, Key Planning conducted on-the-ground fieldwork in which street front retail premises were documented in terms of the retail store, merchandise category, estimated unit size, vacancy as well as North American Industry Classification System (NAICS).

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, brokerage websites and satellite mapping measurements.

As documented in **Tables 4.1, 4.2 and 4.3** and **Figures 4.1 and 4.2** the County's retail market (including Hamlets of Lac La Biche and Plamondon) has an estimated street front floor space of approximately 582,562 sf. This floor space is comprised of business types that range from Grocery to Home Improvement, Restaurants, Personal Services such as Salons as well as Professional and Medical Services. When excluding businesses that are not retail related but do occupy retail street front spaces, the total inventory is an estimated 414,112 sf.

The inventory distinguishes between Professional Medical, Finance/Insurance/Real Estate Services or other Non-Retail that may occupy traditional street front spaces, but typically do not have a retail productivity. Regardless, many of these uses even if not traditional retail are essential to the lifeblood of retail and are part of the overall market demand analysis.

Table 4.1
RETAIL MARKET SNAPSHOT

TOTAL	582,562	
TOTAL Retail Only	414,112	
VACANT	69,820	sq. ft.
% VACANT	16.9%	
Retail Space Per Capita (against COUNTY Population)	47.9	sq.ft./capita
Retail Space Per Capita (against Trade Area Population)	15.5	sq.ft./capita

4.3
RETAIL VACANCY

A review of the current vacancy and nature of the vacancies provides additional cues for prospective business interests in the community.

Figure 4.1

HAMLET OF LAC LA BICHE RETAIL INVENTORY MAP

(Source: Key Planning Strategies)

Figure 4.1

HAMLET OF PLAMONDON RETAIL INVENTORY MAP

(Source: Key Planning Strategies)

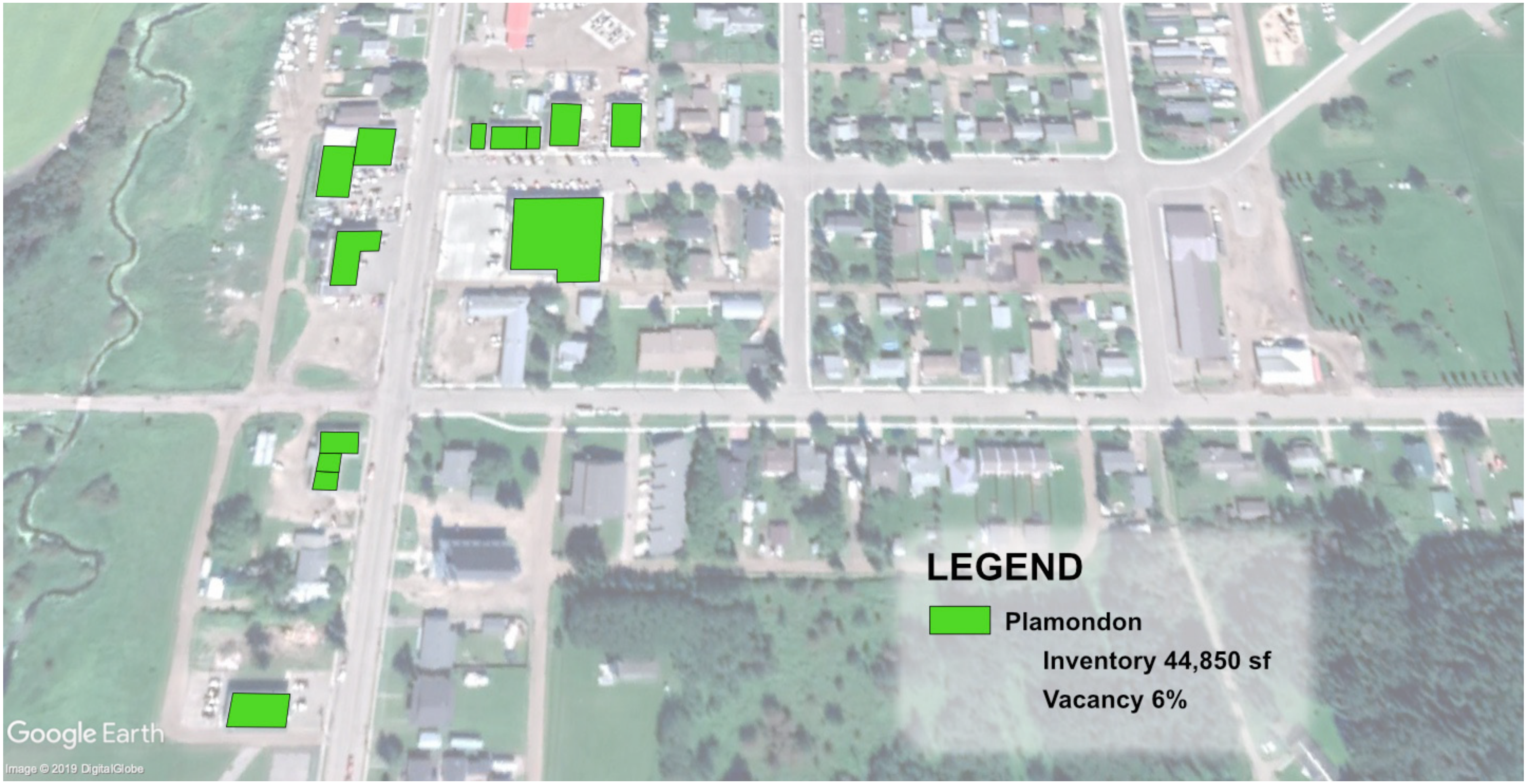


Figure 4.2

COUNTY (INCLUDING HAMLETS OF LAC LA BICHE & PLAMONDON) RETAIL INVENTORY BY CATEGORY

(Source: Key Planning Strategies)

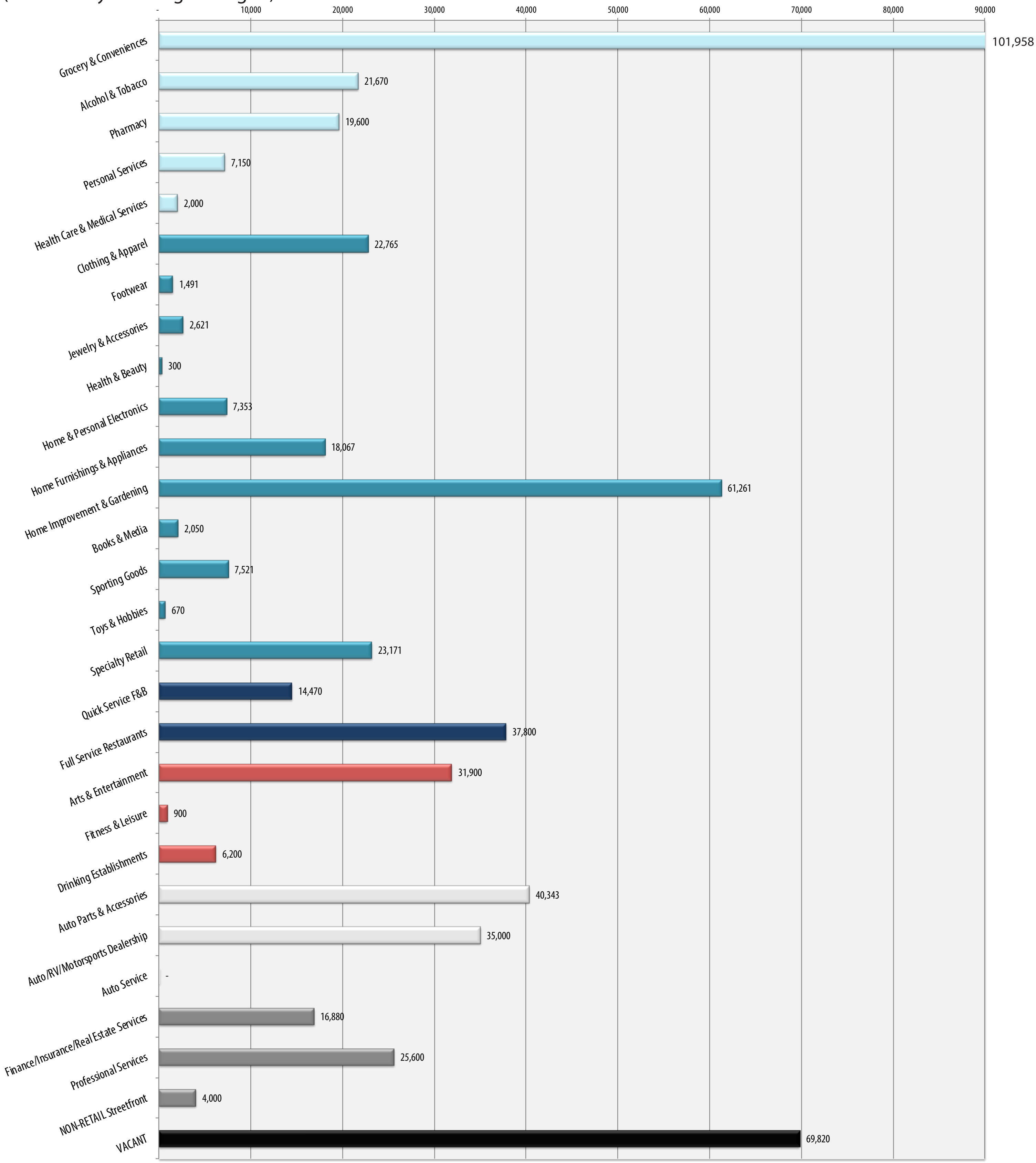


Table 4.2

COUNTY (INCLUDING HAMLETS OF LAC LA BICHE & PLAMONDON) RETAIL INVENTORY SUMMARY

Merchandise Category	Existing Inventory (SF)	Existing Inventory (%)
Grocery & Conveniences	101,958	17.5%
Alcohol & Tobacco	21,670	3.7%
Pharmacy	19,600	3.4%
Personal Services	7,150	1.2%
Health Care & Medical Services	2,000	0.3%
Clothing & Apparel	22,765	3.9%
Footwear	1,491	0.3%
Jewelry & Accessories	2,621	0.4%
Health & Beauty	300	0.1%
Home & Personal Electronics	7,353	1.3%
Home Furnishings & Appliances	18,067	3.1%
Home Improvement & Gardening	61,261	10.5%
Books & Media	2,050	0.4%
Sporting Goods	7,521	1.3%
Toys & Hobbies	670	0.1%
Specialty Retail	23,171	4.0%
Quick Service F&B	14,470	2.5%
Full Service Restaurants	37,800	6.5%
Arts & Entertainment	31,900	5.5%
Fitness & Leisure	900	0.2%
Drinking Establishments	6,200	1.1%
Auto Parts & Accessories	40,343	6.9%
Auto/RV/Motorsports Dealership	35,000	6.0%
Auto Service	-	0.0%
Finance/Insurance/Real Estate Services	16,880	2.9%
Professional Services	25,600	4.4%
NON-RETAIL Streetfront	4,000	0.7%
VACANT	69,820	12.0%
TOTAL	**582,562**	**100.0%**

Table 4.3

RETAIL INVENTORY SUMMARY BY NODE

Community/Neighbourhood	Existing Inventory (SF)	Existing Inventory (%)	Vacant (SF)	Vacant (%)
Lac La Biche Downtown	315,132	54%	29,370	**9%**
Lac La Biche Midtown	81,130	14%	0	**0%**
Lac La Biche East	82,050	14%	16,000	**20%**
Lac La Biche West	51,500	9%	0	**0%**
Lac La Biche South	7,900	1%	5,900	**75%**
Plamondon	44,850	8%	2,550	**6%**
TOTAL	**582,562**	**100%**	**53,820**	**9%**

Table 4.4

RETAIL INVENTORY BY NAICS CODES

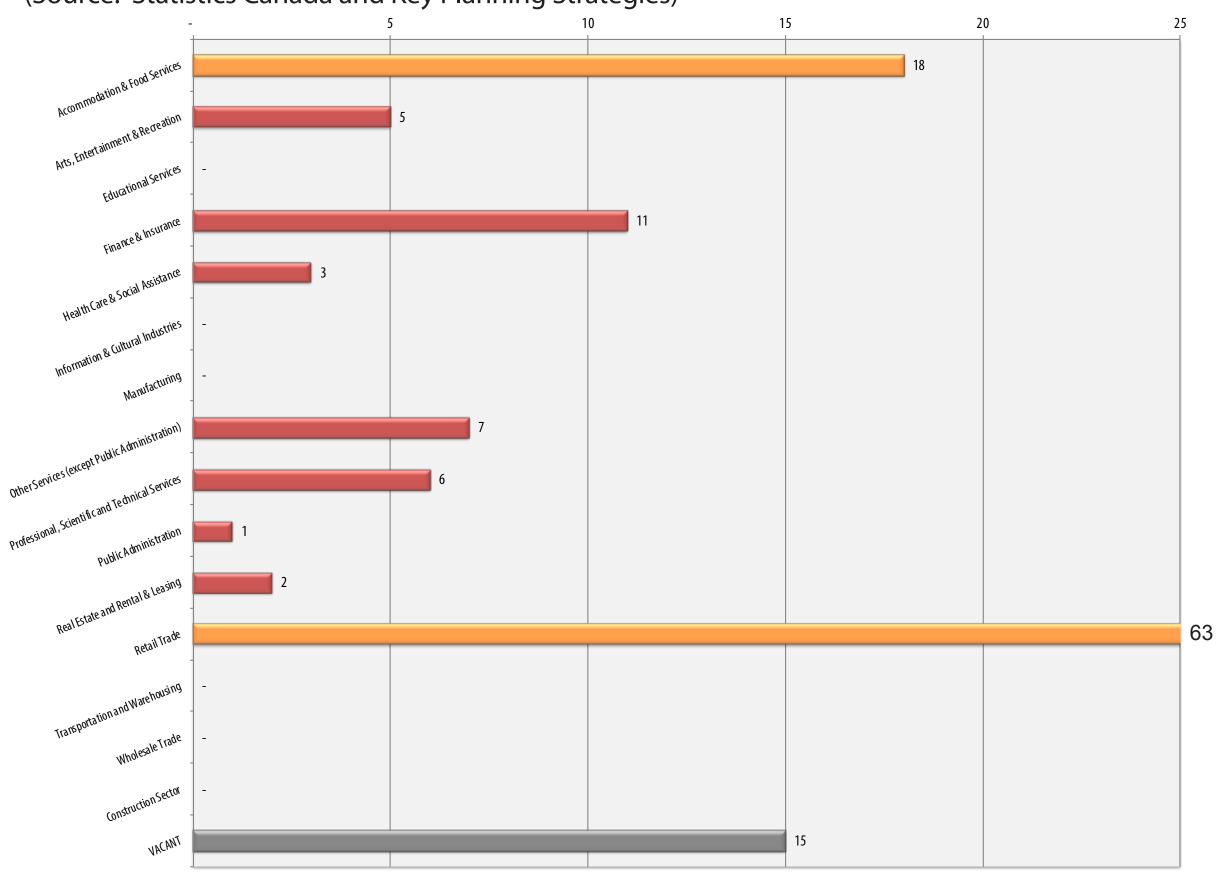
(Source: Statistics Canada and Key Planning Strategies)

	NAICS CLASSIFICATION	Number of Businesses	Business Breakdown
72	Accommodation & Food Services	18	13.7%
71	Arts, Entertainment & Recreation	5	3.8%
61	Educational Services	-	0.0%
52	Finance & Insurance	11	8.4%
62	Health Care & Social Assistance	3	2.3%
51	Information & Cultural Industries	-	0.0%
31-33	Manufacturing	-	0.0%
81	Other Services (except Public Administration)	7	5.3%
54	Professional, Scientific and Technical Services	6	4.6%
91	Public Administration	1	0.8%
53	Real Estate and Rental & Leasing	2	1.5%
44-45	Retail Trade	63	48.1%
49	Transportation and Warehousing	-	0.0%
42	Wholesale Trade	-	0.0%
23	Construction Sector	-	0.0%
VACANT	VACANT	15	11.5%
	TOTAL	**131**	**100.0%**

Figure 4.3

RETAIL INVENTORY BY NAICS CODES

(Source: Statistics Canada and Key Planning Strategies)



The current overall vacancy rate is estimated at 17% which is high, but this includes two larger vacancies; former Ford Dealership and former RONA home improvement warehouse. When excluding these 2 larger formats, the vacancy drops to 6.9%, which for the Hamlet of Lac La Biche is considered favourable.

Despite the high vacancy overall, the implications of vacancy (buildings and land) are two-fold. Firstly, the opportunity may exist to attract businesses into existing vacant spaces or land that could have lower rent costs applied and as a result may be more attractive to local businesses who may not have the sales productivity to justify higher rents. In particular, a missing brand in the community is Canadian Tire and either of the 2 vacant locations (Ford Dealership or RONA) would be compatible for a format like Canadian Tire. The former RONA site in particular would be highly beneficial for the community and the Downtown given its location. It must however be stated, that for this location to truly be valuable, an at-grade rail crossing must be put in place that extends from 101st St. Not only would this make the former RONA site accessible, but it would provide great benefit for Downtown businesses in keeping patrons and spending in the Downtown.

Secondly, any new development should be very targeted for uses that have the ability to create benefit for the greater good rather than impacting existing businesses.

As noted, retail opportunities exist for new-to-market tenants in spaces that are ready to occupy and in many cases are of a standard appropriate and conducive to basic tenant improvements. This downtown area should be a marketing priority and represent the best opportunity to attract new retail to the community. New development or redevelopment could be identified at vacant lots or older properties along the 101st Avenue corridor.

Although vacancy is a mild concern, equally speaking succession planning is also a concern/ opportunity where it is often the case in smaller markets that businesses and buildings tend to be for sale rather than particular spaces for lease.

4.4 RETAIL INVENTORY BY CATEGORY

Tables 4.2 and 4.3 and Figure 4.2 (and Appendix A) provides a breakdown of Lac La Biche and Plamondon's retail inventory by category.

The Top 5 retail categories (excluding Auto) in terms of overall retail floor space are:

1. *Grocery & Specialty Foods* — *101,958 sf*
2. *Home Improvement & Garden* — *61,261 sf*
3. *Full Service Restaurants* — *37,800 sf*
4. *Clothing & Apparel* — *22,765 sf*
5. *Alcohol & Tobacco* — *21,670 sf*

The County has a limited retail offering within the Comparison or Department Store Type Merchandise Categories (DSTM), which could set the stage for a format such as WalMart and/or Canadian Tire, which are the primary reason the majority of shoppers in the County choose to shop in Athabasca or St. Paul.

While there may be opportunities to strategically add to this inventory or worth pursuing in certain circumstances, it is important that they be located at sites that are compatible and beneficial to the community as a whole and the downtown specifically.

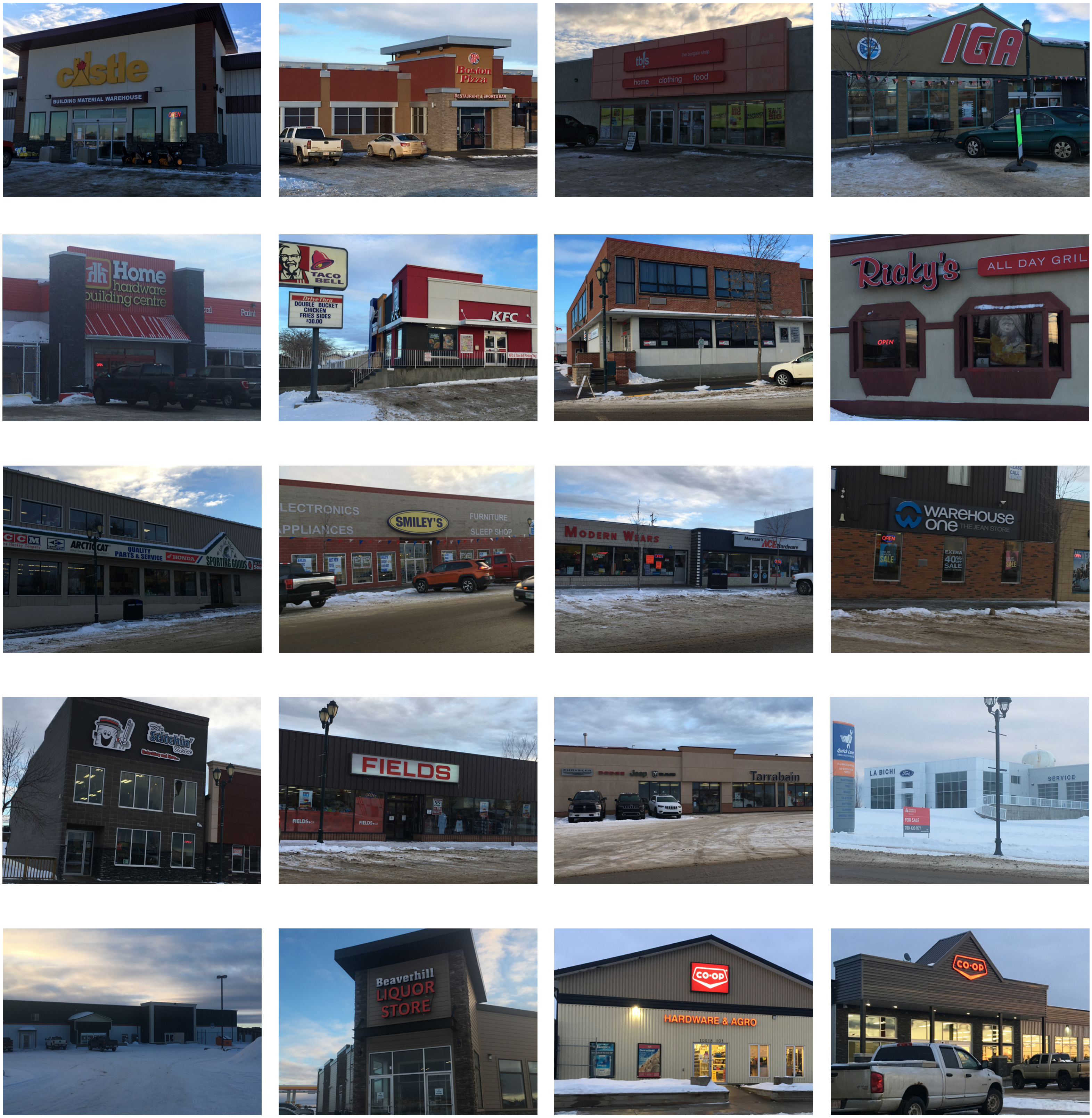
4.5 RETAIL INVENTORY BY NAICS

Table 4.3 and Figure 4.3 provides a breakdown of the North American Industry Classification System (NAICS) for the County's street front businesses.

Figure 4.4

REPRESENTATIVE LAC LA BICHE & PLAMONDON RETAIL IMAGERY

Source: Photos by Key Planning Strategies)



Photos courtesy of Key Planning Strategies

The County's street front inventory is comprised of almost 48.1% of businesses that are traditional Retail in their classification, followed by almost 13.7% in the Accommodations & Food Services classification.

Rounding out the top 3 industries are the Finance & Insurance and Other Services (which comprise hair salons businesses). Combined, these classifications account for 8.4% and 5.3% respectively of the County's businesses that occupy street front spaces in the community. These figures do not include any home-based or remote rural businesses.

The strong presence of Finance/Insurance/Real Estate services is equally important to acknowledge as banks in particular are the lifeblood to downtowns and every effort should be made to ensure they stay in Lac La Biche's main street/downtown. This is noted, because it is often the case where new larger development takes place, that financial institutions are known to "follow the customers".

4.6
RETAIL SPACE PER CAPITA

Utilizing data from Key Planning's extensive retail inventory tabulation in conjunction with Demographic Data provided by Statistics Canada and Manifold Data Mining Inc., the approximate retail space per capita ratio has been estimated for the County's retail market.

As a starting point, **Figure 4.5** depicts the Target Retail Space Per Capita, which provides a baseline for determining how much retail per capita is best suited to a community, according to its population size.

How much retail a community is able to support is crucial for determining future land use plans: a local government wants to have as much evidence as possible to demonstrate to potential retailers the opportunity and untapped potential in their community. Per Capita ratios can also be used as a methodology to gauge future demand, if and as population growth occurs.

In predominantly rural areas in and around the County, Lac La Biche is a shopping locale for not only the residents, but a larger regional area.

The current retail space per capita, as calculated by Key Planning takes into account a trade area beyond simply Lac La Biche by using a drive time analysis and other criteria to form the retail trade (as noted in Section 3).

Figure 4.5 is meant to illustrate a general indication of retail opportunity and representation for communities, with an understanding that some variations do exist.

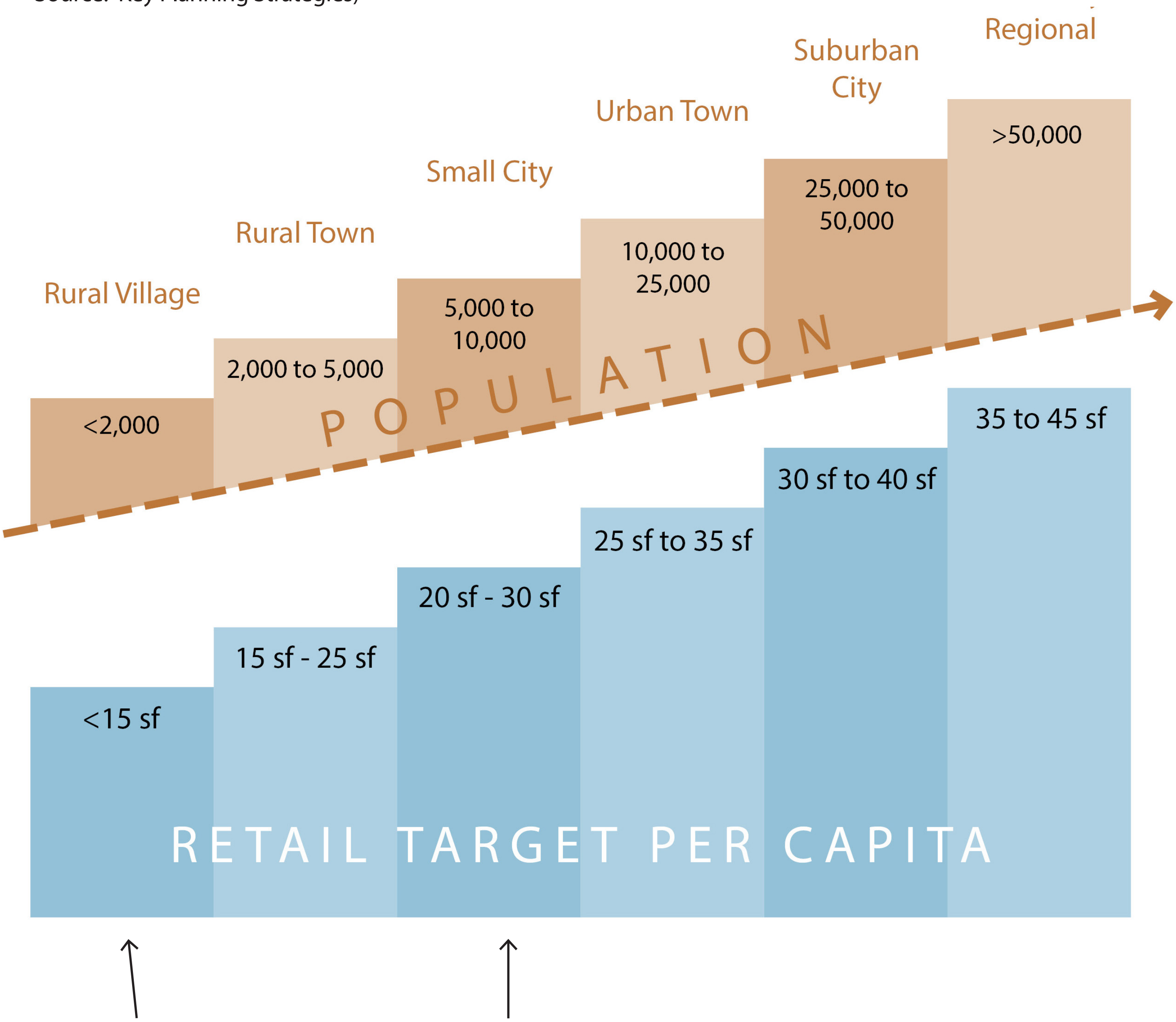
Many location specific factors contribute to an areas overall retail market, and cannot be addressed in a general chart or graph. Such locational factors can include specialized demands of a community, or unique characteristics that warrant certain retail traits. Aside from unique locational factors that each retail trade area has, **Figure 4.5** provides beneficial direction and insight for communities to consider when trying to understand the opportunities of their retail market.

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

Figure 4.5

RETAIL SPACE PER CAPITA GROWTH CONTINUUM

Source: Key Planning Strategies)



THE COUNTY'S PER CAPITA RETAIL RATIO IS 15.5 sq. ft. per capita when applied against the total trade area population of 26,645

An appropriate target for the County's Trade Area should be in the range of 20 to 25 sq. ft per capita

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*).

This figure can be misleading however as this accounts for organized shopping center space only in centers larger than 10,000 sf. Therefore, when factoring in all retail including street front retail, urban markets can be higher than this figure.

It also means that rural markets, since they don't have the same type of retail infrastructure need to factor all space into their equation, since they are predominantly main street and multiple property owner/business owner driven.

Using **Figure 4.5** as a benchmark for retail space in communities and for a comparable market like the County which is more rural and reaches a wider area given the more remote nature, this figure should fall in the 25 to 35 sf per capita range.

Accordingly, the estimated retail space per capita ratio for the County and its 27,000 person retail trade area is in the range of 15.5 sf/capita if not including non-retail street front space and not accounting for other retail in the trade area.

The per capita figure illustrates that the inventory for the County is not just a local market. Rather the County is a localized, regional hub that in reality serves at a minimum a 20,000 person market, but as shown in the Trade Area profile is actually feasibly in line with a 30,000 person trade area.

The County should be striving for a target retail space per capita ratio of 20 to 25 sf/capita.

As an example, a trade area of 27,000 residents supporting a per capita ratio of 20 sf would result in a total supportable inventory of 540,000 sf or approximately 125,000 sf more than exists today (for retail-specific categories).

The retail inventory in terms of floor space and vacancies suggest that demand may not be robust, but that the County should be very targeted in its approach to obtaining the most compatible retail businesses to fit within the Lac La Biche's existing vacant spaces or land fronting or visible to/from Hwy 55 at the gateway to the downtown.

Lac La Biche's downtown will be susceptible to future retail growth in the periphery and with current vacancies levels in the downtown caution should be exercised to make sure that businesses and vacancies in the downtown are promoted to best degree possible.

This is yet another reason that the County should review its current allocation and locations for commercial land for the future to make sure that development is directed in the most appropriate areas in terms of scale and impact.

Much of the future demand and tenant prospects are likely to be of a branded nature and by virtue of their site selection requirements, they will be looking for tenant ready spaces or new development.

Per capita is a typical rule-of-thumb benchmark, but locational contexts do play a role. The Edmonton Metropolitan Region has a significant impact on retail within an approximate 1 to 2 hour drive whereby major bigger ticket branded retailers typically know their consumers will travel up to 2 hours for specific goods not available in their community.

5 Consumer Survey

5.1 INTRODUCTION

MDB Insight conducted a random telephone survey and a follow up online survey in which respondents were asked a number of questions regarding their shopping habits and preferences as it relates to the County's current retail market.

Survey respondents were targeted to Lac La Biche County, Athabasca County and Smoky Lake County to give a wide representation. The exact breakdown of origin of residence for the telephone survey is shown in **Figure 5.2**. The representative survey sample size was 200 persons aged 18+ was obtained. A Random Digit Dialing Telephone methodology was utilized to collect the interviews using a combination of residential landlines and cell phone numbers.

5.2 TELEPHONE SURVEY RESULTS

The telephone consumer survey of 200 respondents identified a number of questions to gauge how the residents are spending their money inside the County, outside the County and online. In addition to the spending habits, questions were asked pertaining to their reasons for shopping outside the County and what types of shops, services or other offering would play a key role in retaining their spending in the community.

Accordingly, **Table 5.1 and Figures 5.2 to 5.9** illustrate the key findings and patterns based on the responses from residents interviewed.

Overall Spending Patterns

In terms of an overall retail spending, as shown in **Figure 5.3**, approximately 39% of the survey respondents indicated that they spend between $1 and $499 on average per month for retail products and services. An additional 31% spend between $500 and $999 on average per month.

Of the latter total average monthly spending, respondents were asked to indicate how much of that spending was located to day-to-day purchases or convenience (refer to **Figure 5.4**). The survey results indicated that 33% of respondents allocated between 60% to 80% of their total spend on day-to-day purchases, while 25% of respondents indicated that they allocated between 40% to 60% of their total spend on day-to-day purchases.

This pattern is strong for local conveniences, but suggests an opportunity for greater spending on DSTM (Department Store Type Merchandise) is prevalent, but may not be fully captured the overall offering in the County.

Spending Inside Lac La Biche County

Table 5.1 and Figures 5.2 and 5.5 illustrate the nature of spending by survey respondents on all purchases inside the County.

The results illustrate that for the residents of the County, overall retention of retail spending is low for most categories across the board, with a total average retention of only 34%. This means outflow is considerable for the community. According to the telephone survey respondents in **Figure 5.5**, 32% identified the Town of Athabasca as their primary shopping location, which is high.

Arguably, the introduction of a WalMart and/or Canadian Tire would be a notable catalyst to not just greater retention of local resident spending, but also greater attraction of new spending that otherwise would not occur in the community. Similarly, the these particular brands could also help to increase the market size and penetration for spending on Home Furnishings and Appliances.

Resident Spending / Economic Leakage Questionnaire

Figure 5.1

TELEPHONE SURVEY RESPONDENT ORIGIN OF RESIDENCE (%)

(Source: MDB Insight)

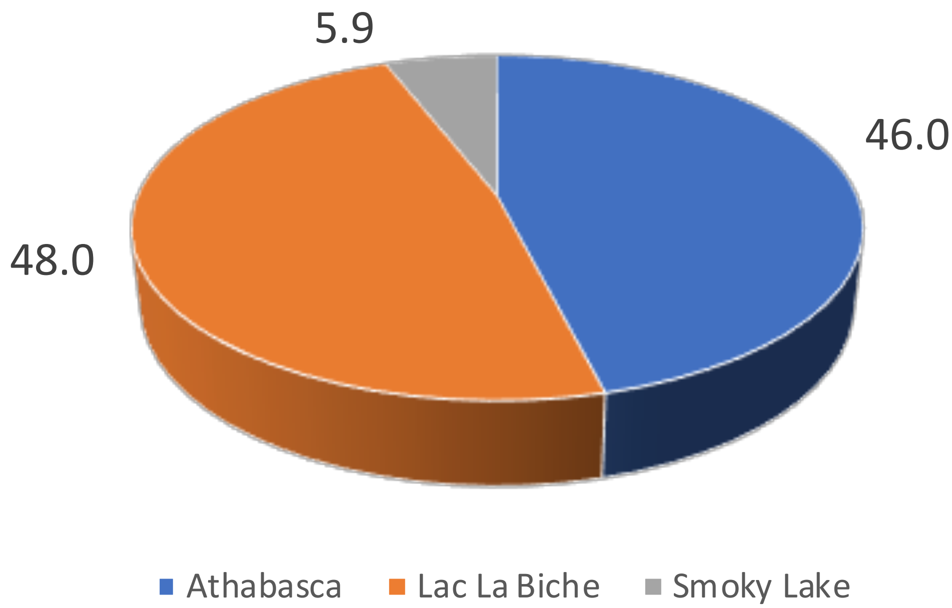


Table 5.1

TELEPHONE SURVEY RESPONDENT PERCENTAGE OF AVERAGE MONTHLY RETAIL SPENDING BY MERCHANDISE CATEGORY SEGMENT

(Source: MDB Insight)

Retail Merchandise & Spending Category (TELEPHONE SURVEY)	**Local Spending (Lac La Biche)**	**Online Spending**	**Outside Lac La Biche**
Grocery/specialty foods/floral	45.24	0.38	54.38
Alcohol & Tobacco	41.13	0.69	58.18
Pharmacy (prescription and over-the-counter)	51.89	0.52	47.60
Health and beauty (fitness, barber, beauty salon, spa)	45.34	1.21	53.45
Personal/household services (eye glasses/lens, travel agent, post office/courier, dry cleaning/laundry, veterinarian, plumber, etc.)	42.04	1.15	56.81
Health services (doctor, dentist, optometrist)	46.56	0.00	53.44
Financial/professional services (banking, insurance, legal, accounting)	44.90	5.76	49.34
Clothing, Apparel & Footwear	19.81	6.46	73.72
Jewellery and accessories	19.03	6.47	74.50
Home & Personal electronics/appliances	31.89	5.31	62.80
Home furnishings/accessories	32.88	2.88	64.24
Hardware and home improvement	41.86	1.21	56.93
Books and multimedia	19.31	22.84	57.85
Sporting goods	36.81	1.38	61.81
Toys and hobbies	20.48	7.04	72.47
Full service restaurants (provide examples such as Brown's Social House, Original Joes etc.)	32.25	0.30	67.45
Fast food restaurants & cafes (provide examples such as Subway, Tim Hortons, Starbucks, etc.)	33.56	0.26	66.18
Family entertainment & leisure (provide examples such as movie theatres, bowling alleys, etc.)	22.33	1.93	75.74
Auto, RV & Motorsports Dealerships	25.69	0.54	73.77
Auto Parts, Maintenance & Accessories	35.39	1.15	63.46
	34.42	**3.37**	**62.21**

Figure 5.2

TELEPHONE SURVEY RESPONDENT PERCENTAGE OF AVERAGE MONTHLY RETAIL SPENDING BY MERCHANDISE CATEGORY SEGMENT

(Source: MDB Insight)

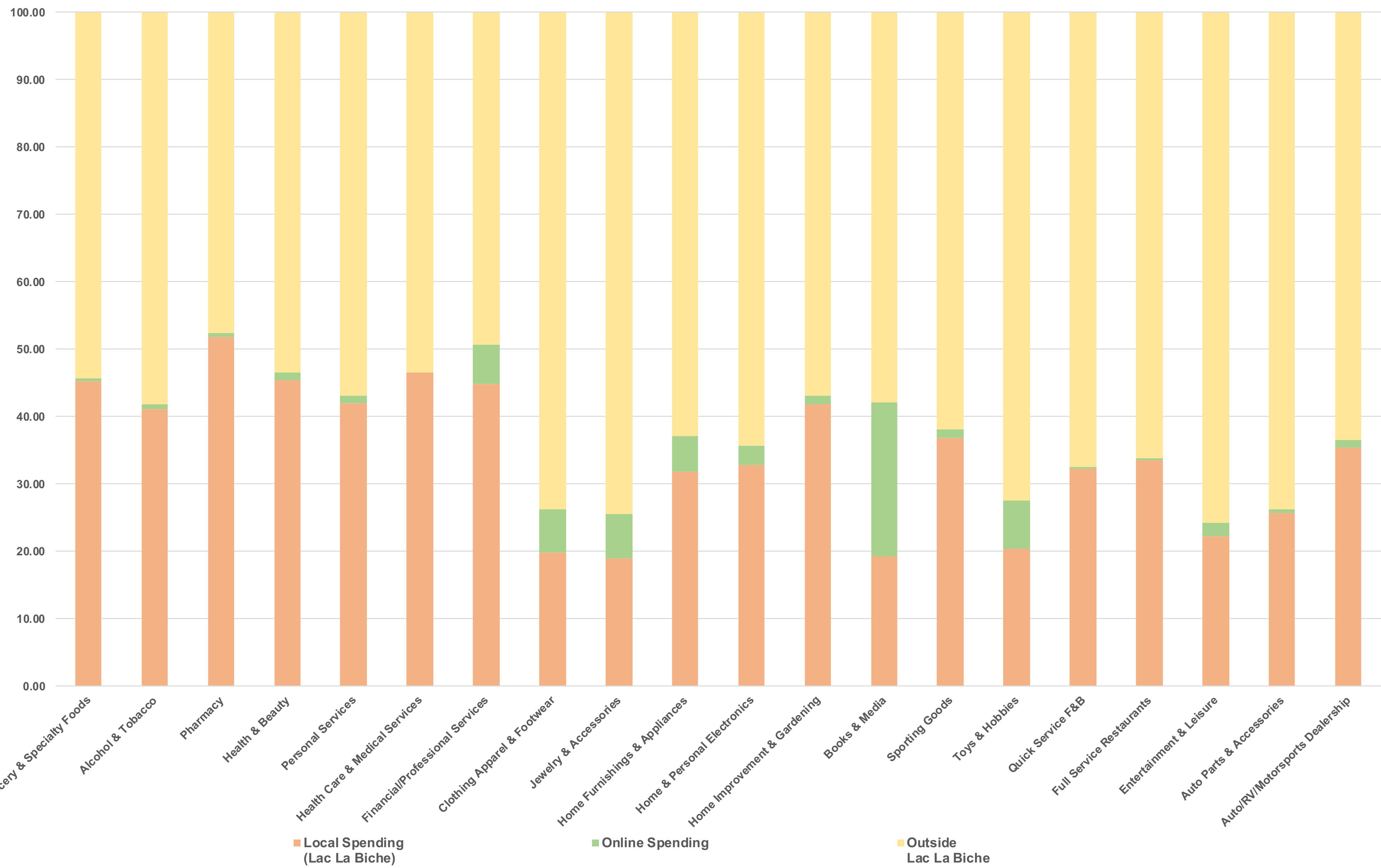


Figure 5.3

TELEPHONE SURVEY RESPONDENT PERCENTAGE OF AVERAGE MONTHLY RETAIL SPENDING (Source: MDB Insight)

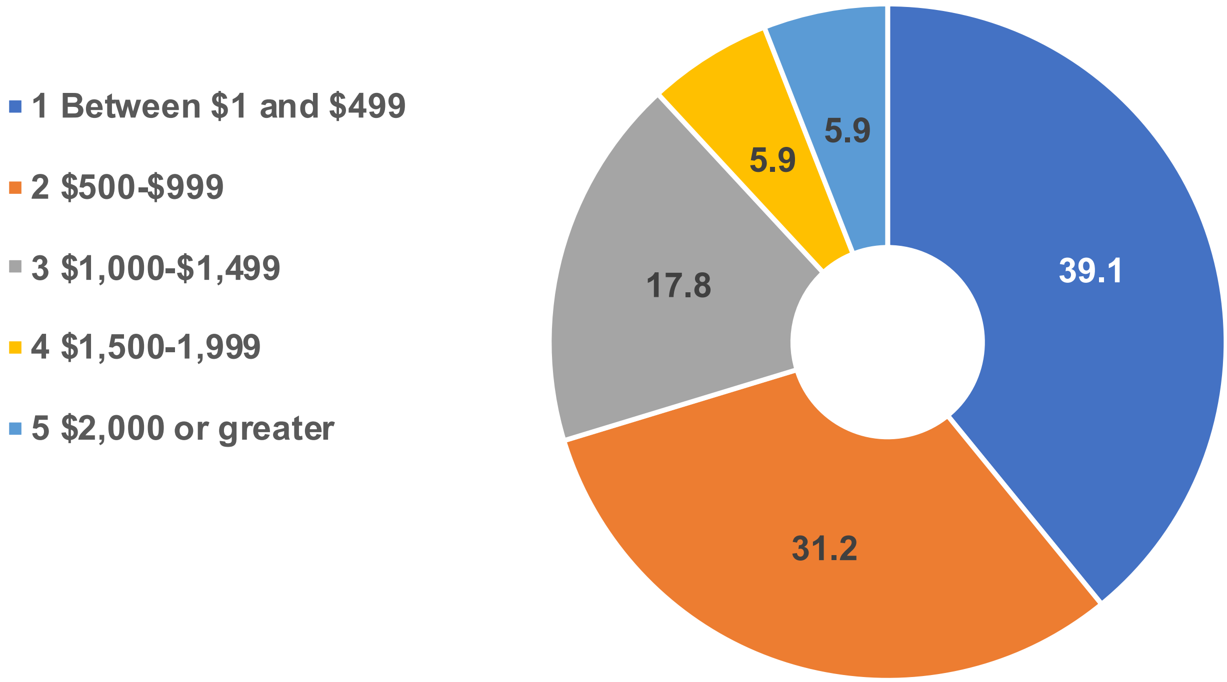


Figure 5.4

TELEPHONE SURVEY RESPONDENT PERCENTAGE SPENT ON DAY-TO-DAY PURCHASES (Source: MDB Insight)

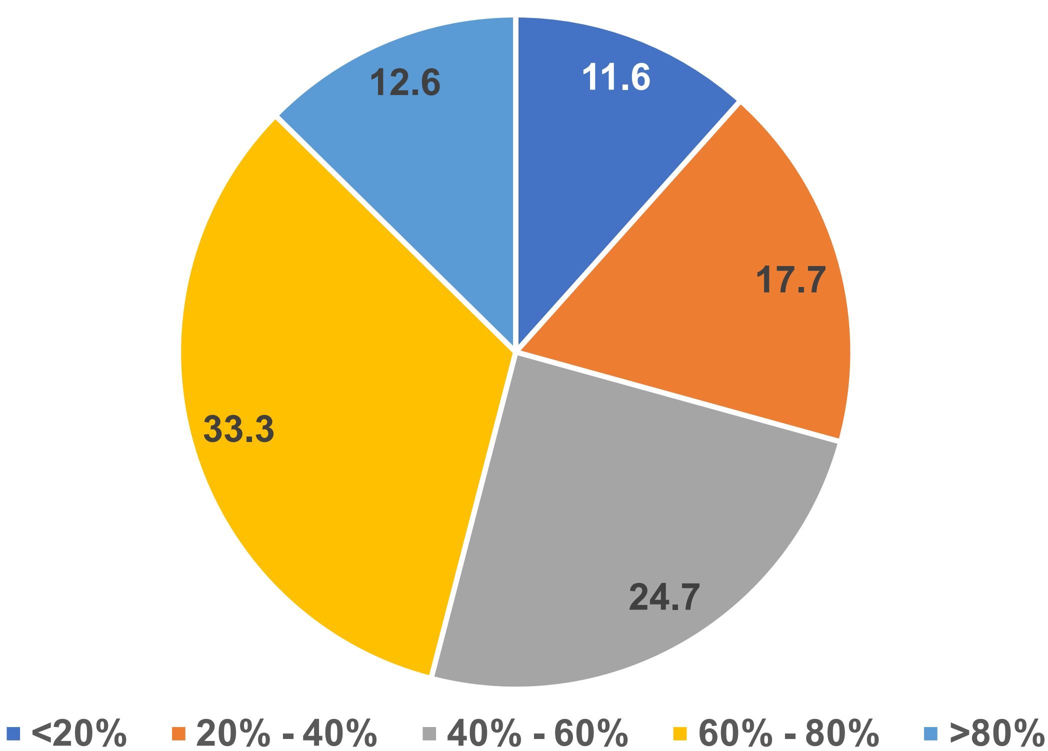


Figure 5.5

TELEPHONE SURVEY RESPONDENT PREFERRED SHOPPING LOCATIONS

(Source: MDB Insight)

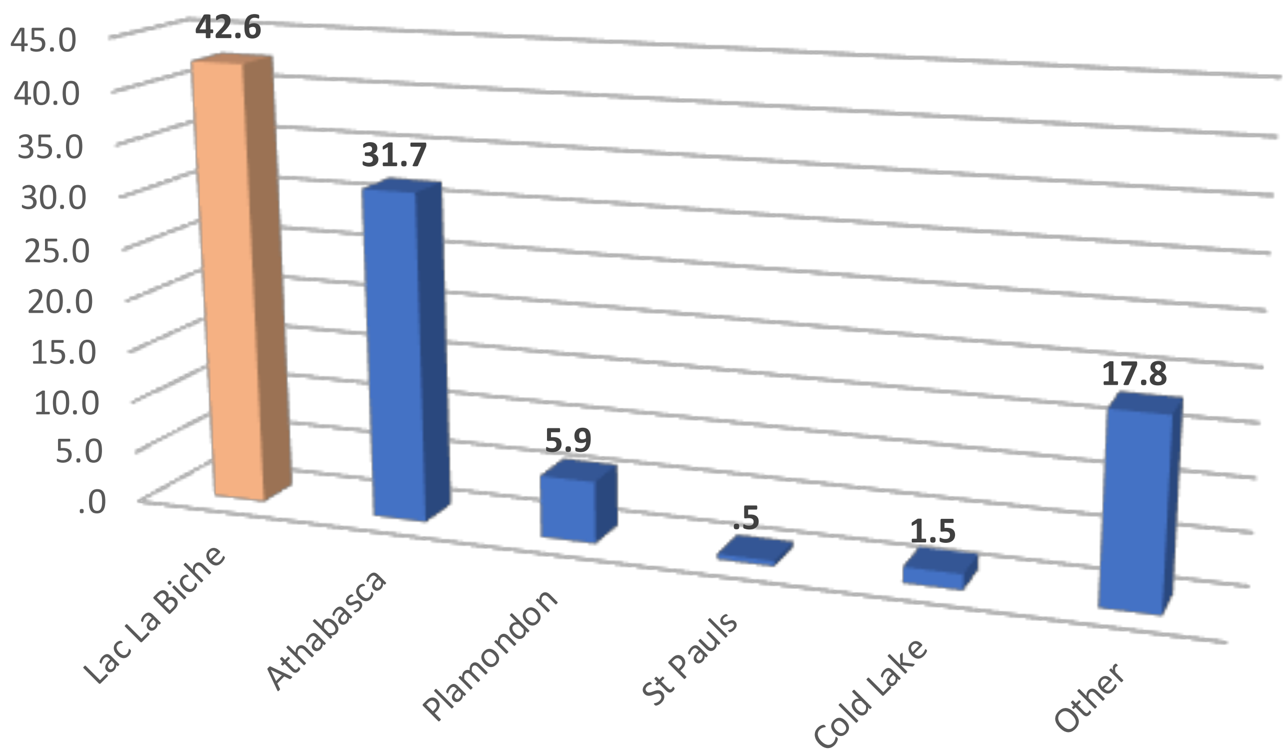


Figure 5.6

TELEPHONE SURVEY RESPONDENT PERCENTAGE SPENT LOCALLY IN LAC LA BICHE COUNTY (Source: MDB Insight)

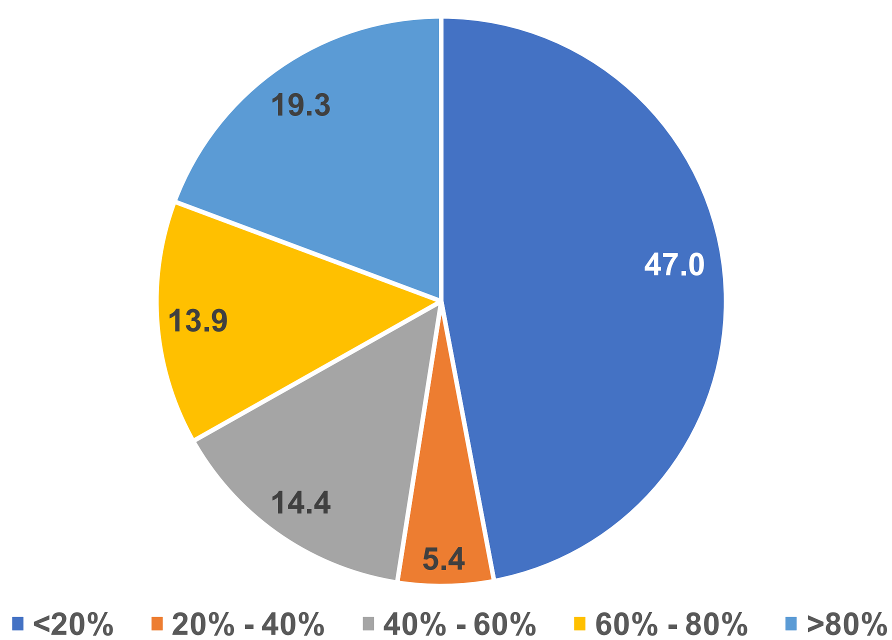


Figure 5.7

TELEPHONE SURVEY RESPONDENT PERCENTAGE SPENT OUTSIDE OF LAC LA BICHE COUNTY (Source: MDB Insight)

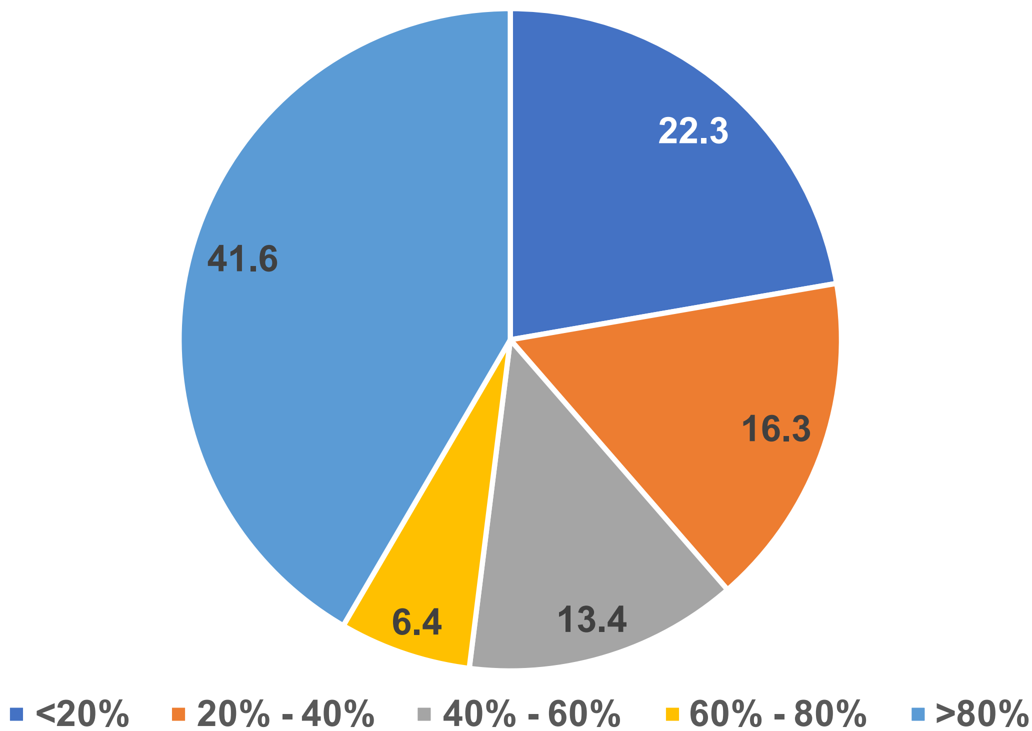
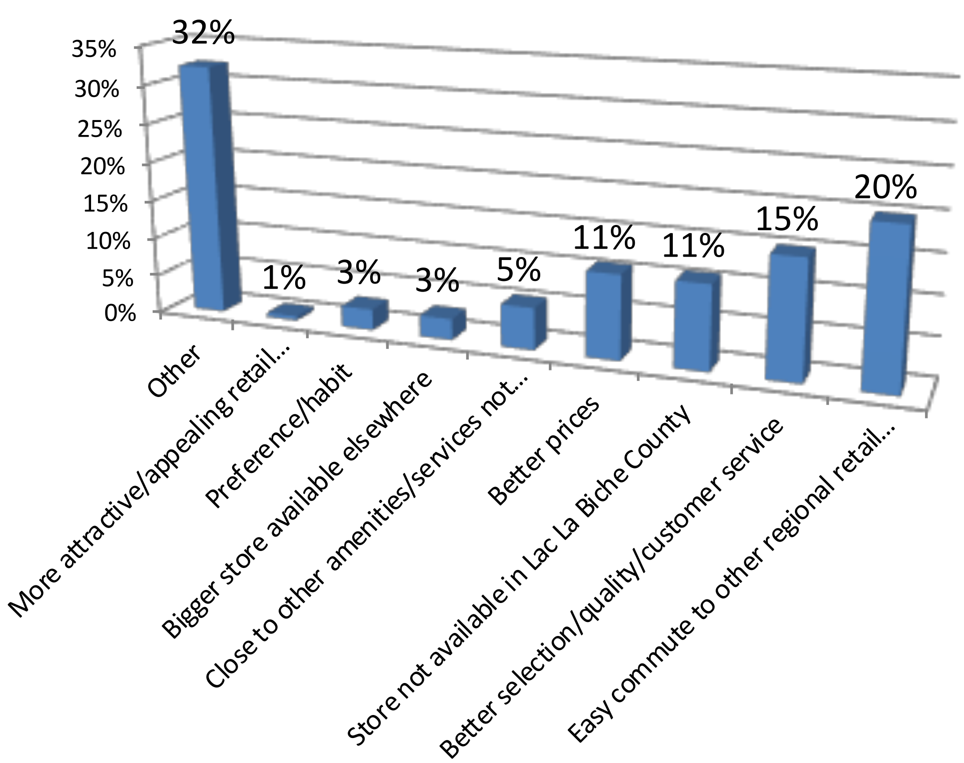


Figure 5.8

TELEPHONE SURVEY RESPONDENT PRIMARY REASON FOR NOT SHOPPING IN LAC LA BICHE COUNTY (Source: MDB Insight)



Surprisingly, conveniences and day-to-day purchases inside the County are also not as strongly supported as would normally be the case in a secondary community like Lac La Biche. This also suggests a strong opportunity to increase the sales retention, particularly in Lac La Biche.

Spending Outside Lac La Biche County

Table 5.1 and Figure 5.5 illustrate the nature of spending by survey respondents on all purchases outside the County or "leakage".

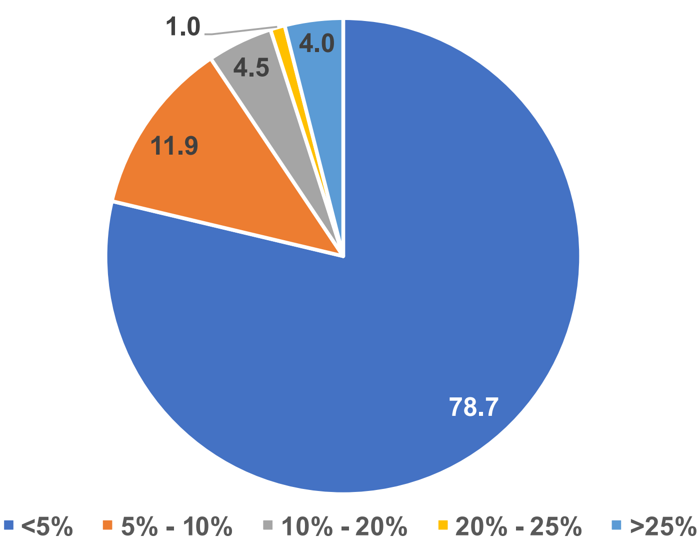
The results of the survey indicate that almost 42% of the respondents indicated that they spend more than 80% of their retail dollars outside of the County, further validating the low sales retention and high leakage in the County.

Figure 5.9

TELEPHONE SURVEY

RESPONDENT PERCENTAGE SPENT ONLINE

(Source: MDB Insight)



NOTE: Refer to Appendix B which provides a full list of the open ended responses that comprise the "Other" reasons for spending outside the County.

Referring to **Figure 5.8**, when respondents were asked to identify their primary reasons for shopping outside of the County, the top rationale provided were that it is easier to commute to other destinations where there is a better selection including stores that aren't in the County. These comments most frequently pertain to the Town Athabasca and City of Fort Saskatchewan.

Online Spending

Table 5.1 and Figure 5.9 illustrates the nature of online spending as it relates to consumer spending of survey respondents.

Figure 5.7 reveals that 79% of the survey respondents typically spend less than 5% of their retail expenditure on online purchases.

While this trend continues to gain momentum, nationally, the fact that 12% of survey respondents spent between 5% to 10% of their spending online is a noticeable market share trend that more than likely validates the rationale identified for store selection or product variety, when those types of stores aren't available in the County.

It will be difficult for the County to curb its online sales trend as many of the store types consumers are using either don't have a physical bricks and mortar location or it is a brand for whom Lac La Biche or Plamondon is not a target. The reality is that local businesses could expand their online capacity and/or have a location that allows for the expedience and access to central pick up.

5.3
ONLINE SURVEY RESULTS

The online consumer survey garnered an additional 116 responses gauging how the residents are spending their money inside the County outside the County and online. The online survey was administered through the County website and thus generally obtained responses from within the local community and consequently the results are more locally oriented.

The nature of an online survey also yielded a higher than average response rate for the amount of spending online. This is often found in online surveys, where respondents are more familiar with and prefer using online services for their personal activities.

Accordingly, **Table 5.2 and Figures 5.10 and 5.12** illustrate the key findings and patterns based on the responses from online survey participants.

The online respondents, because they are predominantly local in their origin show a higher propensity of spending on day to day services and conveniences in the County, but their spending on so-called bigger ticket items or DSTM type merchandise is actually quite low.

Overall, the online respondents spend almost 13% on online spending. This is a high rate, wherein specific categories like Home Electronics, Books, Sporting Goods, Toys and Clothing are dominant. This presents a challenge for some local business retention, but may also present an opportunity to look at attraction as a way to mitigate the online spending.

Industry-wide however, online spending will continue to grow, but it doesn't always come at the expense of existing sales, but rather online spending is in many cases generating spending that may not have already been allocated. In essence the size of the spending pie has increased because of online retail and the convenience thereof.

The low spending on specific DSTM type categories has a correlation with a much higher rate of online spending which as noted is often the case with those who participate in online surveys.

It is interesting to observe that within the online respondent base, the specific categories of Home Improvement and Sporting Goods actually have healthy rates of sales retention in the County, but they also have high leakage.

Overall, the approximate 35% sales retention means there are many categories that exhibit high rates of leakage or spending outside of the County by the online respondents. The fact that locals do not frequent the County as much as those from outside the local area is a concern and represents an opportunity to focus the message for marketing to the local trade area.

5.4
MERGED TELEPHONE AND ONLINE SURVEY RESULTS

While it is not statistically valid to utilize the merged results, it is nonetheless useful to view the results to see the output of the total 316 survey respondents.

Accordingly, **Table 5.3 and Figures 5.11 and 5.13** illustrate the key findings and patterns based on the responses from the combined telephone and online respondents.

The overall merged profile of spending confirms the low overall sales retention within the County and the corresponding high rates of leakage.

Day to day conveniences and services have a lower than expected rate of sales retention, which is partly a factor driven by cost of goods and overall offering.

5.5 SUMMARY

The consumer survey documented a weak pattern of local sales retention and as will be highlighted in **Appendix B**, provided some direction as to desired store types or brands.

The surveys not only examined local resident spending patterns, but also included those within adjacent counties and thus it is important to note that the true success of the County will come from its wider supporting trade area, which is the foundation and justification for the current retail inventory and future demand.

Having said this, the low rate of local sales retention should be a focus of attention to ensure that local businesses can garner more support by the local trade area within the County itself.

The overall sales retention is estimated to be around 35% and a community of Lac La Biche County's size, with its trade area reach should strive for a market share of 40% to 45% within which conveniences should be at or above 60% - 70%, which would be 10% - 20% higher than current levels.

The Survey Questionnaire also provided an opportunity for open-ended responses pertaining to the following two (2) questions. These responses are provided in full in Appendix B:

Is there anything that the County could do or change to get you to spend more of your retail shopping in the County?

What new types of stores, services and/or restaurants would increase your visits and spending in the County?

Table 5.2

ONLINE SURVEY RESPONDENT PERCENTAGE OF AVERAGE MONTHLY RETAIL SPENDING BY MERCHANDISE CATEGORY SEGMENT

(Source: MDB Insight)

Retail Merchandise & Spending Category (ON-LINE WEB SURVEY)	**Local Spending (Lac La Biche)**	**Online Spending**	**Outside Lac La Biche**
Grocery/specialty foods/floral	57.48	2.53	39.99
Alcohol & Tobacco	62.24	0.41	37.35
Pharmacy (prescription and over-the-counter)	78.23	2.97	18.80
Health and beauty (fitness, barber, beauty salon, spa)	54.32	8.60	37.07
Personal/household services (eye glasses/lens, travel agent, post office/courier, dry cleaning/laundry, veterinarian, plumber, etc.)	48.15	7.81	44.05
Health services (doctor, dentist, optometrist)	55.69	0.64	43.67
Financial/professional services (banking, insurance, legal, accounting)	61.21	7.54	31.25
Clothing, Apparel & Footwear	13.14	26.59	60.27
Jewellery and accessories	7.11	26.39	66.51
Home & Personal electronics/appliances	16.32	26.27	57.41
Home furnishings/accessories	19.08	18.64	62.28
Hardware and home improvement	43.52	7.45	49.03
Books and multimedia	6.60	51.39	42.01
Sporting goods	24.67	20.61	54.72
Toys and hobbies	14.92	33.30	51.78
Full service restaurants (provide examples such as Brown's Social House, Original Joes etc.)	33.12	0.40	66.48
Fast food restaurants & cafes (provide examples such as Subway, Tim Hortons, Starbucks, etc.)	33.29	1.03	65.69
Family entertainment & leisure (provide examples such as movie theatres, bowling alleys, etc.)	10.53	5.92	83.54
Auto, RV & Motorsports Dealerships	15.11	1.65	83.24
Auto Parts, Maintenance & Accessories	39.56	8.85	51.59
	34.71	**12.95**	**52.34**

Figure 5.10

ONLINE SURVEY RESPONDENT PERCENTAGE OF AVERAGE MONTHLY RETAIL SPENDING BY MERCHANDISE CATEGORY SEGMENT

(Source: MDB Insight)

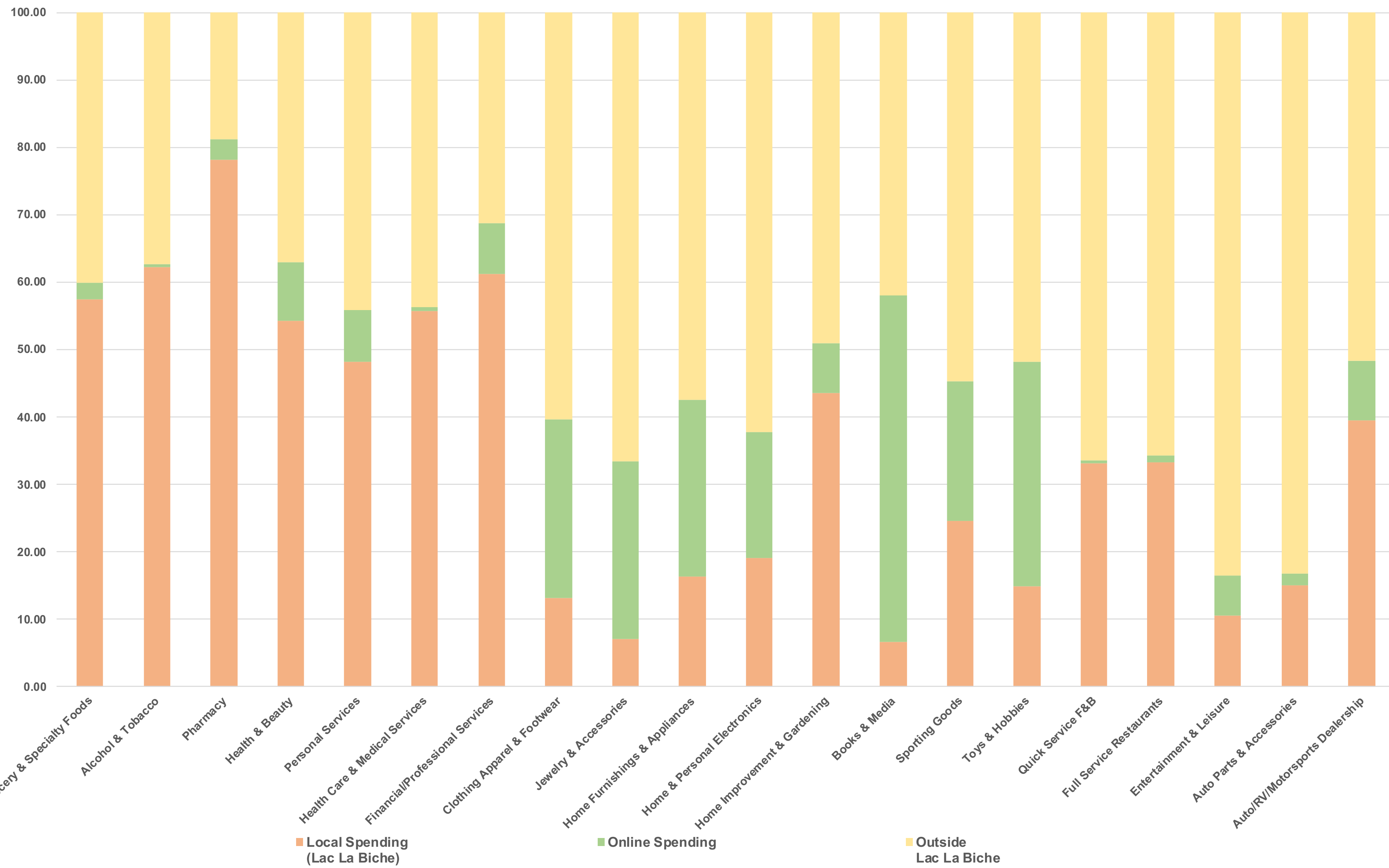


Table 5.3

MERGED TELEPHONE AND ONLINE SURVEY RESPONDENT PERCENTAGE OF AVERAGE MONTHLY RETAIL SPENDING BY MERCHANDISE CATEGORY SEGMENT

(Source: MDB Insight)

Retail Merchandise & Spending Category (MERGED TELEPHONE & ON-LINE WEB SURVEY)	Local Spending (Lac La Biche)	Online Spending	Outside Lac La Biche
Grocery/specialty foods/floral	49.75	1.17	49.07
Alcohol & Tobacco	48.41	0.59	51.00
Pharmacy (prescription and over-the-counter)	61.50	1.41	37.08
Health and beauty (fitness, barber, beauty salon, spa)	48.79	4.05	47.16
Personal/household services (eye glasses/lens, travel agent, post office/courier, dry cleaning/laundry, veterinarian, plumber, etc.)	44.31	3.63	52.06
Health services (doctor, dentist, optometrist)	49.86	0.23	49.91
Financial/professional services (banking, insurance, legal, accounting)	50.91	6.41	42.68
Clothing, Apparel & Footwear	17.32	13.99	68.69
Jewellery and accessories	14.36	14.27	71.37
Home & Personal electronics/appliances	25.89	13.39	60.72
Home furnishings/accessories	27.47	9.05	63.48
Hardware and home improvement	42.47	3.49	54.04
Books and multimedia	14.27	34.17	51.56
Sporting goods	31.86	9.21	58.92
Toys and hobbies	18.18	17.93	63.90
Full service restaurants (provide examples such as Brown's Social House, Original Joes etc.)	32.59	0.34	67.07
Fast food restaurants & cafes (provide examples such as Subway, Tim Hortons, Starbucks, etc.)	33.45	0.56	65.99
Family entertainment & leisure (provide examples such as movie theatres, bowling alleys, etc.)	17.23	3.66	79.12
Auto, RV & Motorsports Dealerships	21.89	0.94	77.17
Auto Parts, Maintenance & Accessories	36.94	4.01	59.05
	34.37	**7.13**	**58.50**

Figure 5.11

MERGED TELEPHONE AND ONLINE SURVEY RESPONDENT PERCENTAGE OF AVERAGE MONTHLY RETAIL SPENDING BY MERCHANDISE CATEGORY SEGMENT

(Source: MDB Insight)

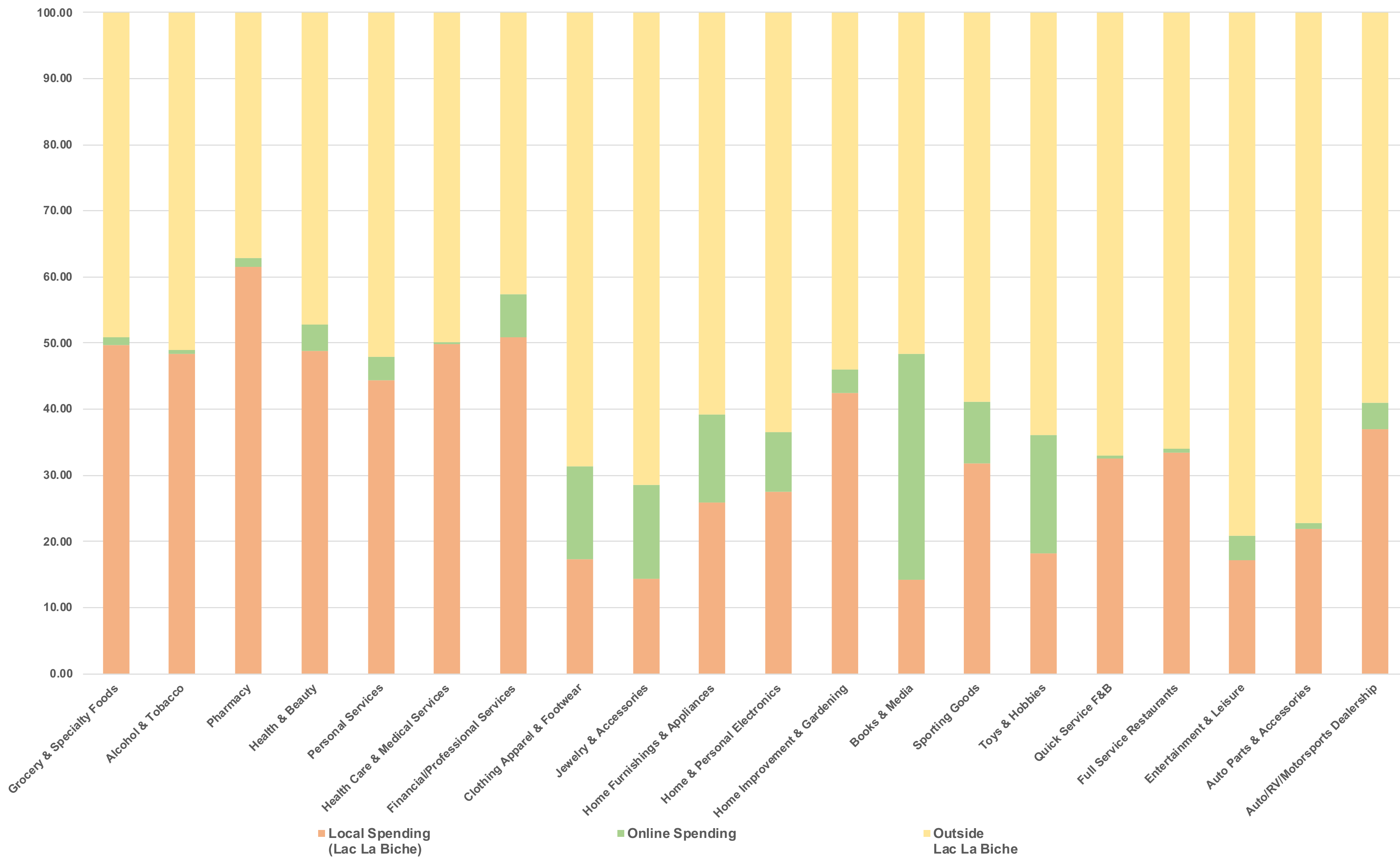


Figure 5.12

ONLINE SURVEY RESPONDENT PREFERRED SHOPPING LOCATIONS

(Source: MDB Insight)

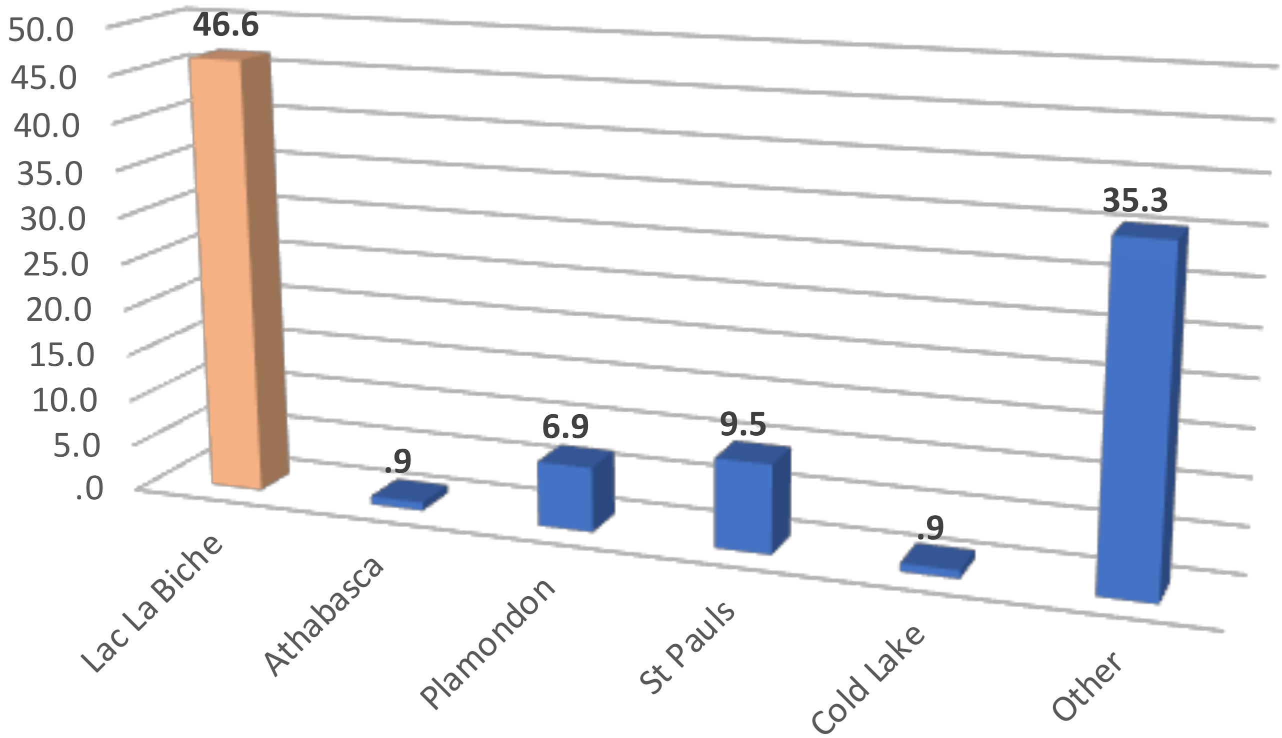
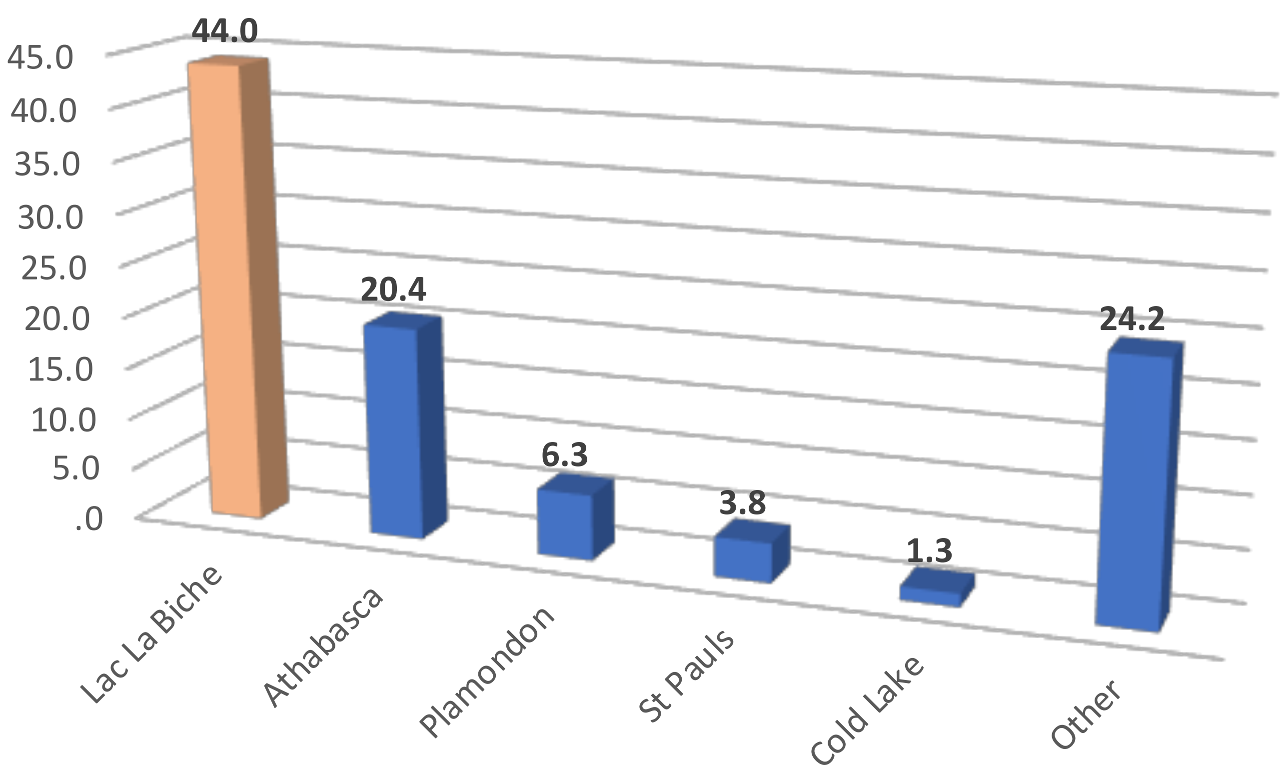


Figure 5.13

MERGED TELEPHONE AND ONLINE SURVEY RESPONDENT PREFERRED SHOPPING LOCATIONS (Source: MDB Insight)



6 Retail Demand

6.1 INTRODUCTION

The following section will assess the amount of supportable floor space in the County justified by the Trade Area it serves. After determining the supportable and residual floor space (if and as determined), the retail analysis will measure the difference between the supply and demand as presented in terms of inflow or outflow of retail sales and the net resulting implications on demand and tenant prospects. A final step will be to forecast demand in terms of both floorspace and land to provide a basis for future land use planning in the County.

6.2 RETAIL FLOOR SPACE DEMAND

In most typical urban market scenarios, forecasting retail demand would largely be predicated and have a close correlation with population growth and the inherent opportunities that would naturally come from a growing trade area. However in secondary or rural markets and since population growth forecasts in the County are not expected to provide this requisite increase, an alternative approach to demand is applied.

The overall retail market in the County seems exhibit some small-scale near term opportunities, mostly in the Hamlet of Lac La Biche within the existing retail inventory to accommodate new business opportunities.

With this understanding of the County's market dynamic and population growth and the results of the consumer survey, the key to forecasting new floorspace demand must look at the notion of achieving a greater market share of the existing spending for categories that represent strength today. In particular, as will be shown this greater market share will need to apply to the local and surrounding trade area, given what seems to be a weak overall sales retention.

From Key Planning's extensive analysis of the current retail inventory, retail sales productivity estimates were applied to each of the respective categories to provide an indication of the current estimated retail sales that the County's businesses are generating.

A sounding board for retail productivities are the lease rates which are estimated to be in the range of $10 - $20 per sf in Lac La Biche's Downtown.

On this basis, it is estimated that retail sales productivities in the community would average in the $175 to $275 per sq. ft. range with the possible exception of conveniences which could be in the range of $300 to $400 per sq. ft. The more remote nature of the County also would suggest lower sales productivities than a growing suburban market like Fort Saskatchewan.

By dividing the aggregate Trade Area retail spending potential by category-specific retail sales productivity estimates (measured in $/sf); and the market shares or sales retention rates from the telephone and online surveys, the estimated warranted or supportable floorspace can be calculated.

The results of this approach is shown in **Tables 6.1 to 6.4**, which profiles Lac La Biche County, the Primary Trade Area (excluding the County), Miscellaneous Inflow from outside the Trade Area and the Total Primary Trade Area including the County and Miscellaneous spending segments.

Lac La Biche County Supply - Demand

Starting with **Table 6.1**, Lac La Biche County as a stand-alone market is quantified to determine, based on expenditure and market shares, just how much retail space the County's estimated 8,658 residents would justify.

Photo courtesy of Key Planning Strategies

TABLE 6.1

LAC LA BICHE COUNTY ESTIMATED RETAIL MARKET SHARE DEMAND

Retail Spending by Merchandise Category	2018 (estimate) Lac La Biche County Retail Sales Productivity ($psf)	Lac La Biche County Retained Market Share	Retained Sales $	Floorspace Demand (sf)
Grocery & Specialty Foods	$375	50%	$18,841,594	50,244
Pharmacy	$375	62%	$2,016,034	5,376
Alcohol & Tobacco	$375	48%	$2,447,373	6,526
Personal Services	$188	44%	$2,224,955	11,866
Clothing & Apparel	$188	17%	$1,283,424	6,845
Footwear	$188	17%	$447,387	2,386
Jewelry & Accessories	$188	14%	$201,171	1,073
Health & Beauty	$300	49%	$1,374,968	4,583
Home Furnishings & Appliances	$225	27%	$1,148,223	5,103
Home & Personal Electronics	$188	26%	$3,996,291	21,314
Home Improvement & Gardening	$206	42%	$2,416,761	11,718
Books & Media	$150	14%	$381,094	2,541
Sporting Goods	$150	32%	$336,856	2,246
Toys & Hobbies	$188	18%	$228,424	1,218
Specialty Retail	$188	26%	$593,567	3,166
Quick Service F&B	$225	33%	$408,122	1,814
Full Service Restaurants	$300	33%	$2,813,161	9,377
Arts & Entertainment	$113	17%	$663,670	5,899
Drinking Establishments	$300	33%	$200,331	668
Fitness & Leisure	$113	49%	$803,779	7,145
Auto Parts & Accessories	$225	37%	$951,024	4,227
Auto/RV/Motorsports Dealership	$188	22%	$6,046,166	32,246
TOTAL RETAIL CATEGORIES ONLY	**$252**	**35%**	**$49,824,376**	**197,581**
TOTAL (excluding Auto Parts & Accessories & Auto/RV/Motorsports Dealerships)	**$266**	**38%**	**$42,827,186**	**161,108**

TABLE 6.2

PTA (EXCLUDING LAC LA BICHE COUNTY) ESTIMATED RETAIL MARKET SHARE DEMAND

Retail Spending by Merchandise Category	2018 (estimate) PTA Excluding Lac La Biche County Sales Productivity ($psf)	PTA Inflow & Retained Market Share	Inflow & Retained Sales $	Floorspace Demand (sf)
Grocery & Specialty Foods	$375	45%	$27,968,558	74,583
Pharmacy	$375	56%	$2,839,898	7,573
Alcohol & Tobacco	$375	43%	$3,840,040	10,240
Personal Services	$188	40%	$3,281,672	17,502
Clothing & Apparel	$188	15%	$1,886,851	10,063
Footwear	$188	15%	$653,768	3,487
Jewelry & Accessories	$188	13%	$292,011	1,557
Health & Beauty	$300	44%	$2,139,512	7,132
Home Furnishings & Appliances	$225	24%	$1,718,060	7,636
Home & Personal Electronics	$188	23%	$5,946,835	31,716
Home Improvement & Gardening	$206	38%	$3,430,545	16,633
Books & Media	$150	13%	$836,557	5,577
Sporting Goods	$150	29%	$572,704	3,818
Toys & Hobbies	$188	16%	$330,428	1,762
Specialty Retail	$188	23%	$893,721	4,767
Quick Service F&B	$225	30%	$635,969	2,827
Full Service Restaurants	$300	30%	$4,161,584	13,872
Arts & Entertainment	$113	15%	$1,015,361	9,025
Drinking Establishments	$300	30%	$305,159	1,017
Fitness & Leisure	$113	44%	$1,181,340	10,501
Auto Parts & Accessories	$225	33%	$1,367,465	6,078
Auto/RV/Motorsports Dealership	$188	20%	$8,127,723	43,348
TOTAL RETAIL CATEGORIES ONLY	**$253**	**31%**	**$73,425,761**	**290,714**
TOTAL (excluding Auto Parts & Accessories & Auto/RV/Motorsports Dealerships)	**$265**	**34%**	**$63,930,573**	**241,288**

TABLE 6.3

MISCELLANEOUS INFLOW ESTIMATED RETAIL MARKET SHARE DEMAND

Retail Spending by Merchandise Category	2018 (estimate)			
		Miscellaneous Inflow Market Share	Inflow Sales $	Floorspace Demand (sf)
Grocery & Specialty Foods	$375	10%	$9,983,554	26,623
Pharmacy	$375	15%	$1,251,164	3,336
Alcohol & Tobacco	$375	10%	$1,398,767	3,730
Personal Services	$188	5%	$667,188	3,558
Clothing & Apparel	$188	0%	$0	0
Footwear	$188	0%	$0	0
Jewelry & Accessories	$188	0%	$0	0
Health & Beauty	$300	0%	$0	0
Home Furnishings & Appliances	$225	0%	$0	0
Home & Personal Electronics	$188	0%	$0	0
Home Improvement & Gardening	$206	25%	$3,707,427	17,975
Books & Media	$150	0%	$0	0
Sporting Goods	$150	0%	$0	0
Toys & Hobbies	$188	0%	$0	0
Specialty Retail	$188	10%	$610,227	3,255
Quick Service F&B	$225	20%	$675,609	3,003
Full Service Restaurants	$300	20%	$4,507,360	15,025
Arts & Entertainment	$113	15%	$1,581,043	14,054
Drinking Establishments	$300	0%	$0	0
Fitness & Leisure	$113	5%	$215,957	1,920
Auto Parts & Accessories	$225	10%	$667,684	2,967
Auto/RV/Motorsports Dealership	$188	10%	$6,853,168	36,550
TOTAL RETAIL CATEGORIES ONLY	**$243**	**7%**	**$32,119,148**	**131,996**
TOTAL (excluding Auto Parts & Accessories & Auto/RV/Motorsports Dealerships)			**$24,598,296**	**92,478**

TABLE 6.4

TOTAL TRADE AREA ESTIMATED RETAIL MARKET SHARE DEMAND

Retail Spending by Merchandise Category	2018 (estimate)			
	TOTAL Retail Sales Productivity ($psf)	TOTAL Market Share	Inflow Sales $	Floorspace Demand (sf)
Grocery & Specialty Foods	$375	52%	$56,793,707	151,450
Pharmacy	$375	64%	$6,107,097	16,286
Alcohol & Tobacco	$375	50%	$7,686,180	20,496
Personal Services	$188	44%	$6,173,815	32,927
Clothing & Apparel	$188	16%	$3,170,275	16,908
Footwear	$188	16%	$1,101,155	5,873
Jewelry & Accessories	$188	13%	$493,182	2,630
Health & Beauty	$300	46%	$3,514,480	11,715
Home Furnishings & Appliances	$225	25%	$2,866,283	12,739
Home & Personal Electronics	$188	24%	$9,943,126	53,030
Home Improvement & Gardening	$206	52%	$9,554,733	46,326
Books & Media	$150	13%	$1,217,651	8,118
Sporting Goods	$150	30%	$909,560	6,064
Toys & Hobbies	$188	17%	$558,852	2,981
Specialty Retail	$188	31%	$2,097,515	11,187
Quick Service F&B	$225	42%	$1,719,700	7,643
Full Service Restaurants	$300	42%	$11,482,105	38,274
Arts & Entertainment	$113	27%	$3,260,074	28,978
Drinking Establishments	$300	31%	$505,491	1,685
Fitness & Leisure	$113	49%	$2,201,076	19,565
Auto Parts & Accessories	$225	41%	$2,986,172	13,272
Auto/RV/Motorsports Dealership	$188	28%	$21,027,057	112,144
TOTAL RETAIL CATEGORIES ONLY	**$250**	**38%**	**$155,369,285**	**620,290**
TOTAL (excluding Auto Parts & Accessories & Auto/RV/Motorsports Dealerships)	**$265**	**43%**	**$131,356,055**	**494,874**

Accordingly, **Table 6.1** reveals that the County's residents could justify approximately just over 197,581 sf of retail space (including auto dealerships and parts), at an overall market share of 35%.

Primary Trade Area (Excluding Lac La Biche County) Supply - Demand

To isolate the area surrounding the County, **Table 6.2** illustrates the magnitude of retail floorspace demand that is attributable to the remainder of the Primary Trade Area (17,997 residents), but excluding Lac La Biche County.

The purpose for excluding the County was to allow for a more sensitized market share approach (as evidenced by the online respondents).

The resulting analysis in **Table 5.2** reveals supportable floorspace demand of 290,714 sf and an estimated market share of 31% attributable to residents in the Primary Trade Area (excluding Lac La Biche County).

Miscellaneous Inflow Supply - Demand

Table 6.3 applies estimated rates of inflow to various categories that takes into account travelers or visitors to the County from beyond the identified Trade Area. The figures reveal demand attributed to miscellaneous inflow for approximately 131,996 sf of retail at a conservative estimated market share of approximately 7%.

Total Trade Area Supply - Demand

Table 6.4 aggregates the total demand for floorspace attributable to the County's Trade Area segments at approximately 620,290 sf at a market share of 38%.

Table 6.5 provides a summary of the estimated residual demand based on the current market shares and sales estimates.

When compared against the current County retail inventory or supply at 464,462 sf, the difference between demand and supply equates to almost 156,000 sf of residual retail demand that could be supported in the County (this value includes current vacant space in the County).

Specific categories that fall within those that are in demand based on current market shares include predominantly day to day conveniences.

Because the methodology reflects current low market shares for many of the DSTM type categories there is limited demand for such categories at current sales retention levels.

Therefore, the key to the County's retail opportunity lies in incrementally and slowly increasing the overall market share of sales, realizing that the draw of the Town of Athabasca (albeit a competitor that could be overcome), Edmonton and to a lesser extent Cold Lake and Fort Saskatchewan will still continue to be notable factors in attracting spending in the DSTM type categories.

Lac La Biche County is a trade area that is within a "competitive" drive time from Edmonton and, which will always put some constraints on the future growth of the County's market, particularly at current low population growth rates.

Tables 6.6 and 6.7 provide a forecast of future demand in terms of floorspace and land. The methodology used for forecasting applied growth in spending at current retained market share rates.

TABLE 6.5

ESTIMATED RESIDUAL FLOORSPACE DEMAND (2018)

Retail Spending by Merchandise Category	2018 (Year End Est.) Total Floorspace Demand (sf)	Current Town/ Inventory (sf)	Total Residual Demand (sf)
Grocery & Specialty Foods	151,450	101,958	49,492
Pharmacy	16,286	21,670	-5,384
Alcohol & Tobacco	20,496	19,600	896
Personal Services	32,927	7,150	25,777
Clothing & Apparel	16,908	22,765	-5,857
Footwear	5,873	1,491	4,382
Jewelry & Accessories	2,630	2,621	9
Health & Beauty	11,715	300	11,414
Home Furnishings & Appliances	12,739	7,353	5,386
Home & Personal Electronics	53,030	18,067	34,963
Home Improvement & Gardening	46,326	61,261	-14,935
Books & Media	8,118	2,050	6,067
Sporting Goods	6,064	7,521	-1,457
Toys & Hobbies	2,981	670	2,310
Specialty Retail	11,187	23,171	-11,984
Quick Service F&B	7,643	14,470	-6,827
Full Service Restaurants	38,274	37,800	474
Arts & Entertainment	28,978	31,900	-2,922
Drinking Establishments	1,685	6,200	-4,515
Fitness & Leisure	19,565	900	18,665
Auto Parts & Accessories	13,272	40,343	-27,071
Auto/RV/Motorsports Dealership	112,144	35,000	77,144
TOTAL RETAIL CATEGORIES ONLY	**620,290**	**464,262**	**156,028**
TOTAL (excluding Auto Parts & Accessories & Auto/RV/Motorsports Dealerships)	**494,874**	**388,920**	**105,955**

The results reveal that by the year 2023, the County could support incremental new 47,939 sf resulting in a cumulative demand (including 2018 residual space) of 203,967 sf. In terms of land requirements, this amount of retail space would conservatively require 18.7 acres, most of which would be in Lac La Biche.

If the retained market shares in this scenario were to increase by 5%, the total demand by the year 2023, without new population growth, but with spending growth and increased retention could result in incremental new space of approximately 81,350 sf.

By 2028, as shown in **Table 6.7** and **Figure 6.1**, the County could support total 10-year incremental new 99,5820 sf resulting in a cumulative demand (including 2018 residual space) of 255,610 sf. In terms of land requirements, this amount of retail space would conservatively require 23.5 acres.

If the retained market shares were to increase and be maintained at 5%, the total demand by the year 2028, without new population growth, but with spending growth and increased retention could result in incremental new space of approximately 135,576 sf.

Part of the overall demand in the County is not premised on providing new retail space since the current vacancy should be addressed as there are some well-positioned assets available for tenancies.

The reality is that demand may only result in a few specifically targeted new businesses. The goal should also be to ensure that existing businesses can increase their market share and resulting sales and profitability rather than adding new space to further dilute what exists today.

TABLE 6.6

LAC LA BICHE 5-YEAR (2023) FORECAST OF FLOORSPACE & LAND

Retail Spending by Merchandise Category	2023 (Year End Est.) 5-Year Total Sales (assuming current market shares)	5-Year Total Floorspace Demand (sq. ft.)	5-Year Incremental Floorspace Demand (sq. ft.)	5-Year Cumulative Floorspace Demand (sq. ft.) (including current residual demand)
Grocery & Specialty Foods	$61,182,952	163,155	11,705	61,197
Pharmacy	$6,579,077	17,544	1,259	-4,126
Alcohol & Tobacco	$8,280,199	22,081	1,584	2,481
Personal Services	$6,650,952	35,472	2,545	28,322
Clothing & Apparel	$3,415,287	18,215	1,307	-4,550
Footwear	$1,186,256	6,327	454	4,836
Jewelry & Accessories	$531,297	2,834	203	212
Health & Beauty	$3,786,093	12,620	905	12,320
Home Furnishings & Appliances	$3,087,801	13,724	985	6,371
Home & Personal Electronics	$10,711,571	57,128	4,098	39,061
Home Improvement & Gardening	$10,293,161	49,906	3,580	-11,355
Books & Media	$1,311,756	8,745	627	6,695
Sporting Goods	$979,854	6,532	469	-989
Toys & Hobbies	$602,042	3,211	230	2,540
Specialty Retail	$2,259,620	12,051	865	-11,120
Quick Service F&B	$1,852,605	8,234	591	-6,236
Full Service Restaurants	$12,369,488	41,232	2,958	3,432
Arts & Entertainment	$3,512,026	31,218	2,240	-682
Drinking Establishments	$544,557	1,815	130	-4,385
Fitness & Leisure	$2,371,184	21,077	1,512	20,177
Auto Parts & Accessories	$3,216,956	14,298	1,026	-26,045
Auto/RV/Motorsports Dealership	$22,652,112	120,811	8,667	85,811
TOTAL RETAIL CATEGORIES ONLY	**$167,376,845**	**668,229**	**47,939**	**203,967**
		Land Requirements (acres) (assuming a site coverage of 25%)	**4.4**	**18.7**

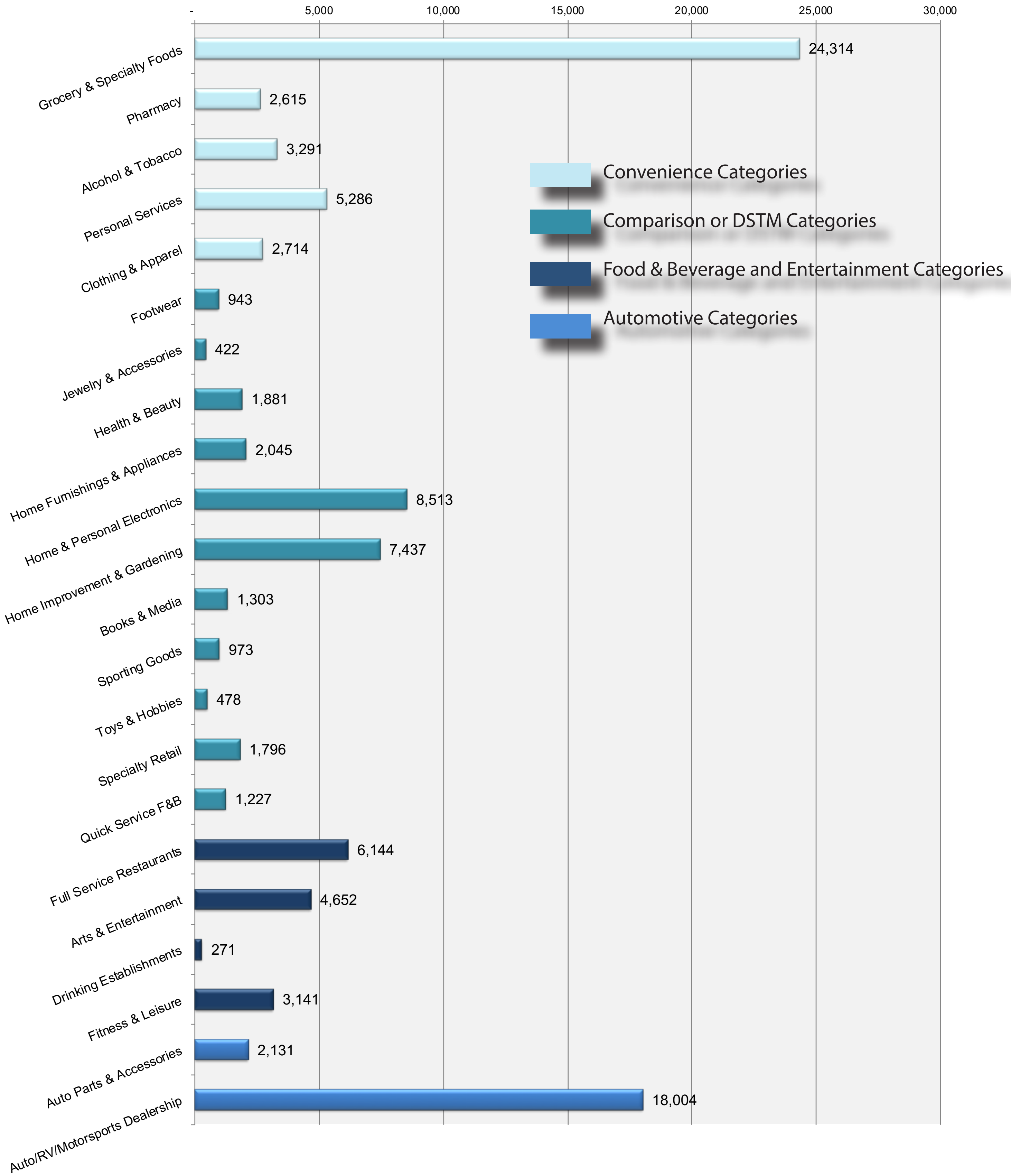
TABLE 6.7

LAC LA BICHE 10-YEAR (2028) FORECAST OF FLOORSPACE & LAND

Retail Spending by Merchandise Category	2028 (Year End Est.) 10-Year Total Sales (assuming current market shares)	10-Year Total Floorspace Demand (sq. ft.)	10-Year Incremental Floorspace Demand (sq. ft.)	10-Year Cumulative Floorspace Demand (sq. ft.) (including current residual demand)
Grocery & Specialty Foods	$65,911,415	175,764	24,314	73,806
Pharmacy	$7,087,535	18,900	2,615	-2,770
Alcohol & Tobacco	$8,920,126	23,787	3,291	4,187
Personal Services	$7,164,964	38,213	5,286	31,063
Clothing & Apparel	$3,679,234	19,623	2,714	-3,142
Footwear	$1,277,935	6,816	943	5,325
Jewelry & Accessories	$572,358	3,053	422	431
Health & Beauty	$4,078,698	13,596	1,881	13,295
Home Furnishings & Appliances	$3,326,439	14,784	2,045	7,431
Home & Personal Electronics	$11,539,404	61,543	8,513	43,476
Home Improvement & Gardening	$11,088,658	53,763	7,437	-7,498
Books & Media	$1,413,133	9,421	1,303	7,370
Sporting Goods	$1,055,581	7,037	973	-484
Toys & Hobbies	$648,570	3,459	478	2,789
Specialty Retail	$2,434,252	12,983	1,796	-10,188
Quick Service F&B	$1,995,782	8,870	1,227	-5,600
Full Service Restaurants	$13,325,452	44,418	6,144	6,618
Arts & Entertainment	$3,783,449	33,631	4,652	1,731
Drinking Establishments	$586,642	1,955	271	-4,245
Fitness & Leisure	$2,554,438	22,706	3,141	21,806
Auto Parts & Accessories	$3,465,575	15,403	2,131	-24,940
Auto/RV/Motorsports Dealership	$24,402,758	130,148	18,004	95,148
TOTAL RETAIL CATEGORIES ONLY	**$180,312,398**	**719,872**	**99,582**	**255,610**
		Land Requirements (acres) (assuming a site coverage of 25%)	**9.1**	**23.5**

FIGURE 6.1

LAC LA BICHE COUNTY 2028 NET POTENTIAL NEW DEMAND BY CATEGORY



Retail growth need not always be about adding new retail, but creating an environment for stronger retention and performance of existing businesses.

The retail demand forecasts suggest that there is not overwhelming demand for future retail, but there are tenants capable of improving the sales retention and attraction in the County. Most notably, these include WalMart and Canadian Tire.

Lac La Biche would be in a position to support these larger tenants, though there would likely be an impact on specific downtown retailers. This is cautionary note that speaks to ensuring that if such tenants are pursued, that they should be located as close as possible to the downtown rather than in a greenfield site at the southern periphery.

Lac La Biche would be better served by promoting compact and clustered commercial growth. Future land needs at approximately 25 acres is much less that the amount of land currently zoned in the community, which should be reviewed to avoid unnecessary and incompatible growth.

6.3 DEVELOPING SUCCESSFUL RETAIL

According to ICSC's "Developing Successful Retail in Secondary and Rural Markets", targeted retail recruitment should reach out to those retailers or developers who may not have discovered a respective community yet.

However, the process to attract businesses must be tempered by reality and thus cognizant of the following:

- Pay attention to the geographic base of operations for retailers. Do not expect retailers to deviate significantly from their base of operations to serve a small community;
- Accept that most retailers have established minimum trade area populations or income thresholds for success based on years of operating experience;
- Understand that the limited consumer spending in small communities simply cannot support some retailers offering specialized merchandise assortments;
- Be realistic about how the business opportunity in a respective community ranks against other opportunities in front of the retailer; and
- Understand the co-tenancy requirements that retailers have established as predictors of success.

Overall, commercial real estate continues to shift to meet the rapidly changing tastes and needs of target markets. Consumers now value uniqueness, and they are quick to switch their brand allegiance. These emerging trends require new developments that are adaptable and flexible, which can stay relevant and retain their consumer base.

One of the most critical aspects to being proactive and understanding whom to target starts with creating a business case based on some statistical foundation.

A statistical business case is typically required to explain the merits of a community. It is important to first establish an understanding of the communities before promoting any specific site option.

Accordingly, the County was profiled to illustrate and document the following statistical facts:

- Geographic delineation of the retail trade area that reflects a realistic drive time or market penetration;
- Demographic and economic profiles of the trade area population;
- Growth projections for the trade area population;
- Annual retail spending;
- Sales performance of key retail categories;
- Current estimated retained market share of trade area spending; and
- Current supportable retail space.

Retail Development Fundamentals

Retail development, whether in smaller communities such as those found throughout the northern/northeastern Alberta region, or like those on the fringe of a larger urban or metropolitan market like Edmonton, are driven by critical business fundamentals that must be acknowledged and considered when identifying retail opportunities.

By way of a checklist, these include:

- Population characteristics of the consumer base;
- The reality that retail follows consumers;
- Consistent and high shopper traffic is a prerequisite for most retailers;
- The consumer base must demonstrate sufficient buying power to be of interest to retailers;
- Chain retailers have a limited number of prototypical store formats that they are willing to operate. Deviating from these established formats is done only as a last resort in circumstances where demand for a location by a retailer or developer is high;
- Most retailers require sites with convenient access, high visibility, and ample parking;
- Most retailers expand in well-defined geographic areas that coincide with their distribution networks and their familiarity with consumer preferences;
- Most retailers have established criteria for site selection. For example, Shoppers Drug Mart typically requires a population of 10,000 people in order to build a 15,000 sf store. This however typically applies to a local segment for whom regular and frequent patronage is expected, particularly for day-to-day types of convenience goods and services. In a general sense for a more remote or secondary market, this benchmark would apply to a 15-30 minute drive time and would be dependent upon the level of competition in a respective market.
- Clustering of compatible retailers has become the norm;
- Retailers cannot generally survive rent-to-sales ratios in excess of 15%. Retailers have a threshold level of sales they know they must achieve to be profitable; and
- Retailers attempt to maximize profitability by operating the fewest number of stores possible in any market to avoid sales transference.

6.4
TARGET RETAIL PROSPECTS

With an understanding of the trade area in terms of spending and demographics along with an understanding of the retail market dynamics, specific potential targeted tenants, many of whom would operate a Franchise model have been identified in **Table 6.8**.

The telephone survey respondents as well as Key Planning's extensive network of retailers, sheds some light as to the future compatible businesses for the County.

To be successful in attracting these store types or brands it is incumbent upon the County to strive to increase its market share of trade area retail spending.

The identified target prospects have been allocated into time horizons of 5 year increments realizing that if successful in the next 5 years of garnering more market share, additional tenants will take notice and give consideration to locating in the County.

While there is no guarantee, the current retail market is void of a few immediate opportunities for whom spaces do exist, but the marketing message needs to be clear and real in terms of the market opportunity.

6.5
SUMMARY

Given current vacancies in the community, combined with some small strategic land assets fronting Hwy 55 near the entry to the Downtown, the amount of forecast space could be accommodated in a manner that would likely be minimally impactful to the community, but could fill some complementary niches, while utilizing current available spaces (e.g. former RONA or Ford Dealerships).

The overall message is that retail demand is not predicated on simply adding new space, but specifically targeting new businesses that have the capacity to succeed while not creating a negative impact on existing local businesses. In retail however, sometimes competition is necessary to ensure that spending is retained in the community and in many cases a new competitor can actually increase the overall spending.

Without population increase, but a marginal increase in overall market share of trade area spending, the County could add to its retail inventory by as much as 250,000 sf in specifically targeted categories/business types by 2028. If the majority of this was in the form of a Canadian Tire and Walmart, they alone would absorb half of that demand.

In a secondary market like Lac La Biche County, the key to attracting businesses lies not only in presenting a good market and business case, but will likely fall under two (2) approaches; securing franchise partners and succession planning.

TABLE 6.8

LAC LA BICHE TARGET RETAIL TENANTS

Retailer	Merchandise Category Segment	Time Horizon Near Term 2020 to 2025	Time Horizon Long Term 2025 to 2030 (or beyond)
WalMart	General Merchandise		✓
Canadian Tire	General Merchandise	✓	
Tim Hortons	F&B Restaurant - Quick Service	✓	
McDonalds	F&B Restaurant - Quick Service	✓	
DQ Grill & Chill	F&B Restaurant - Quick Service	✓	
Freson Bros Grocery	Grocery & Conveniences		✓
Alia n Tanjay	Clothing & Accessories		✓
Ardene	Clothing & Accessories		✓
Children's Place	Clothing & Accessories		x
Marshall's	Clothing & Accessories		x
Old Navy	Clothing & Accessories		x
Pennington's	Clothing & Accessories		✓
Reitman's	Clothing & Accessories		✓
Ricki's/Cleo's	Clothing & Accessories		✓
Winners	Clothing & Accessories		x
Brown's Social House	F&B Restaurant - Full Service		x
Denny's	F&B Restaurant - Full Service		✓
Humpty's	F&B Restaurant - Full Service	✓	
Joey's Only	F&B Restaurant - Full Service		✓
Montana's BBQ & Bar	F&B Restaurant - Full Service		✓
Moxie's Classic Grill	F&B Restaurant - Full Service		x
Original Joe's	F&B Restaurant - Full Service	✓	
Real Canadian Brewhouse	F&B Restaurant - Full Service		x
Red Lobster	F&B Restaurant - Full Service		x
Red Robin	F&B Restaurant - Full Service		✓
Sawmill Steakhouse	F&B Restaurant - Full Service		x
Smitty's	F&B Restaurant - Full Service		x
State & Main Kitchen	F&B Restaurant - Full Service		✓
Swiss Chalet	F&B Restaurant - Full Service		✓
Tony Roma's	F&B Restaurant - Full Service		x
Arby's	F&B Restaurant - Quick Service	✓	
Booster Juice	F&B Restaurant - Quick Service	✓	
Burger King	F&B Restaurant - Quick Service	✓	
Chopped Leaf	F&B Restaurant - Quick Service		✓
Cora's	F&B Restaurant - Quick Service		✓
Five Guys Burger & Fries	F&B Restaurant - Quick Service		✓
Freshii	F&B Restaurant - Quick Service		✓
Good Earth Coffee	F&B Restaurant - Quick Service		✓
Harvey's	F&B Restaurant - Quick Service	✓	
KFC	F&B Restaurant - Quick Service	✓	
Little Caesar's Pizza	F&B Restaurant - Quick Service	✓	
Mary Brown's Chicken	F&B Restaurant - Quick Service	✓	
Mucho Burrito	F&B Restaurant - Quick Service	✓	
Nando's Chicken	F&B Restaurant - Quick Service		✓
Opa	F&B Restaurant - Quick Service	✓	
Second Cup	F&B Restaurant - Quick Service		✓
Starbucks	F&B Restaurant - Quick Service	✓	
Waves Coffee	F&B Restaurant - Quick Service		✓
Wendy's	F&B Restaurant - Quick Service	✓	
Giant Tiger	General Merchandise	✓	
London Drugs	General Merchandise		x
Shopper's Drug Mart	General Merchandise		✓
Value Village	General Merchandise		✓
7/11 Convenience	Grocery & Conveniences	✓	
Cobs Bread	Grocery & Conveniences	✓	
M&M Meat Shops	Grocery & Conveniences	✓	
Sally's Beauty Supplies	Health & Beauty		
Bouclair	Home Furnishings & Décor		x
Home Sense	Home Furnishings & Décor		x
Home Depot	Home Improvement & Gardening		x
Tommy Gun's	Personal Service		✓
Bulk Barn	Specialty Retail	✓	
Global Pet Foods	Specialty Retail	✓	
Michael's Crafts	Specialty Retail		x
Mills Stationery	Specialty Retail		x
EB Games	Toys, Games & Hobbies		x
Mastermind Toys	Toys, Games & Hobbies		✓

For many businesses with recognized brands, the likelihood of attracting a corporate run store is limited, but the franchise model is a distinct possibility.

The optimal approach for this target is to look at a market like Edmonton, Sherwood Park, Fort Saskatchewan or even Lloydminster to see if existing franchise holders would be interested in additional locations as part of an overall locational network strategy, particularly along Hwy 15 in Lac La Biche.

This approach is preferred by franchisers as there is a built in relationship with the franchisees who understand the business model.

The second approach for succession planning is often overlooked in smaller or secondary markets, where a successful local business may be family run and is of value to the community, but its future is up-in-the-air because no one is able to take over.

An organization such as Succession Matching (www.successionmatching.com) provides a road map for businesses to ensure they can continue in their respective communities. Succession planning looks to understand the Consumer Segment, Value Proposition, Revenue Streams, Distribution Channels and Key Partnerships.

Lac La Biche County may not exhibit significant demand forecasts, but with strategic messaging, collaborations and awareness can retain and attract business opportunities that could utilize existing vacancies or new land for the betterment of the community.

Retail Gap Analysis

key planning strategies

Member of
International Council
of Shopping Centers

P3 Retail
ICSC Alliance for Public-Private Partnership

in collaboration with

MDB INSIGHT

APPENDICES

Retail Business Name	Community/Local Area	Retail or Other	General Retail Category	Est. Area (SF)	NAICS Sector #	NAICS Sector Name
Bargain Shop TBS!	Lac La Biche Downtown	Retail	Grocery & Conveniences	5,258	44-45	Retail Trade
Bargain Shop TBS!	Lac La Biche Downtown	Retail	Alcohol & Tobacco	0		
Bargain Shop TBS!	Lac La Biche Downtown	Retail	Pharmacy	0		
Bargain Shop TBS!	Lac La Biche Downtown	Retail	Personal Services	0		
Bargain Shop TBS!	Lac La Biche Downtown	Retail	Clothing & Apparel	3,305		
Bargain Shop TBS!	Lac La Biche Downtown	Retail	Footwear	751		
Bargain Shop TBS!	Lac La Biche Downtown	Retail	Jewelry & Accessories	751		
Bargain Shop TBS!	Lac La Biche Downtown	Retail	Health & Beauty	300		
Bargain Shop TBS!	Lac La Biche Downtown	Retail	Home & Personal Electronics	300		
Bargain Shop TBS!	Lac La Biche Downtown	Retail	Home Furnishings & Appliances	1,502		
Bargain Shop TBS!	Lac La Biche Downtown	Retail	Home Improvement & Gardening	751		
Bargain Shop TBS!	Lac La Biche Downtown	Retail	Books & Media	300		
Bargain Shop TBS!	Lac La Biche Downtown	Retail	Sporting Goods	751		
Bargain Shop TBS!	Lac La Biche Downtown	Retail	Toys & Hobbies	300		
Bargain Shop TBS!	Lac La Biche Downtown	Retail	Specialty Retail	751		
Bargain Shop TBS!	Lac La Biche Downtown	Retail	Quick Service F&B	0		
Bargain Shop TBS!	Lac La Biche Downtown	Retail	Full Service Restaurants	0		
Bargain Shop TBS!	Lac La Biche Downtown	Retail	Arts & Entertainment	0		
Bargain Shop TBS!	Lac La Biche Downtown	Retail	Fitness & Leisure	0		
Bargain Shop TBS!	Lac La Biche Downtown	Retail	Auto Parts & Accessories	0		
VACANT (former RONA)	Lac La Biche Downtown	**VACANT**	**VACANT**	**17,300**	**VACANT**	**VACANT**
NAPA Auto Supplies	Lac La Biche Downtown	Auto	Auto Parts & Accessories	3,400	44-45	Retail Trade
The Print Shop	Lac La Biche Downtown	Retail	NON-RETAIL Streetfront	3,500	81	Other Services (except for Public Administration)
Screenshot Computers	Lac La Biche Downtown	Retail	Home & Personal Electronics	1,600	44-45	Retail Trade
Flashing Cow Café	Lac La Biche Downtown	Retail	Quick Service F&B	800	72	Accommodation & Food Services
Broadbent Accounting	Lac La Biche Downtown	Other	Finance/Insurance/Real Estate Services	1,800	52	Finance & Insurance
Eddie's Mart Convenience	Lac La Biche Downtown	Retail	Grocery & Conveniences	3,500	44-45	Retail Trade
High Point Clothing	Lac La Biche Downtown	Retail	Clothing & Apparel	3,800	44-45	Retail Trade
Fields	Lac La Biche Downtown	Retail	Grocery & Conveniences	370	44-45	Retail Trade
Fields	Lac La Biche Downtown	Retail	Alcohol & Tobacco	0		
Fields	Lac La Biche Downtown	Retail	Pharmacy	0		
Fields	Lac La Biche Downtown	Retail	Personal Services	0		
Fields	Lac La Biche Downtown	Retail	Clothing & Apparel	2,960		
Fields	Lac La Biche Downtown	Retail	Footwear	740		
Fields	Lac La Biche Downtown	Retail	Jewelry & Accessories	370		
Fields	Lac La Biche Downtown	Retail	Health & Beauty	0		
Fields	Lac La Biche Downtown	Retail	Home & Personal Electronics	370		
Fields	Lac La Biche Downtown	Retail	Home Furnishings & Appliances	1,110		
Fields	Lac La Biche Downtown	Retail	Home Improvement & Gardening	370		
Fields	Lac La Biche Downtown	Retail	Books & Media	0		
Fields	Lac La Biche Downtown	Retail	Sporting Goods	370		

Retail Business Name	Community/Local Area	Retail or Other	General Retail Category	Est. Area (SF)	NAICS Sector #	NAICS Sector Name
Fields	Lac La Biche Downtown	Retail	Toys & Hobbies	370		
Fields	Lac La Biche Downtown	Retail	Specialty Retail	370		
Fields	Lac La Biche Downtown	Retail	Quick Service F&B	0		
Fields	Lac La Biche Downtown	Retail	Full Service Restaurants	0		
Fields	Lac La Biche Downtown	Retail	Arts & Entertainment	0		
Fields	Lac La Biche Downtown	Retail	Fitness & Leisure	0		
Fields	Lac La Biche Downtown	Retail	Auto Parts & Accessories	0		
Reminiscence Flowers & Giftware	Lac La Biche Downtown	Retail	Specialty Retail	2,300	44-45	Retail Trade
VACANT - #100 10233 101 Ave	Lac La Biche Downtown	**VACANT**	**VACANT**	**2,300**	**VACANT**	**VACANT**
The Stitchen' Man	Lac La Biche Downtown	Retail	Clothing & Apparel	3,000	44-45	Retail Trade
The Liquor Stop Cold Beer & Wine	Lac La Biche Downtown	Retail	Alcohol & Tobacco	4,800	44-45	Retail Trade
Tara's Pizza	Lac La Biche Downtown	Retail	Quick Service F&B	2,850	72	Accommodation & Food Services
Bill's Burger Baron	Lac La Biche Downtown	Retail	Quick Service F&B	1,750	72	Accommodation & Food Services
VACANT - 10215 101 Ave	Lac La Biche Downtown	**VACANT**	**VACANT**	**2,370**	**VACANT**	**VACANT**
Servus Credit Union	Lac La Biche Downtown	Other	Finance/Insurance/Real Estate Services	4,700	52	Finance & Insurance
Lac La Biche Stationers	Lac La Biche Downtown	Retail	Home & Personal Electronics	2,270	44-45	Retail Trade
Twintel Telus	Lac La Biche Downtown	Retail	Home & Personal Electronics	2,270	44-45	Retail Trade
Value Drug Mart	Lac La Biche Downtown	Retail	Pharmacy	8,700	44-45	Retail Trade
Western Financial	Lac La Biche Downtown	Other	Finance/Insurance/Real Estate Services	1,530	52	Finance & Insurance
Metis Training	Lac La Biche Downtown	Other	Professional Services	1,530	54	Professional, Scientific and Technical Services
Straus Law	Lac La Biche Downtown	Other	Professional Services	1,530	54	Professional, Scientific and Technical Services
Universal Video	Lac La Biche Downtown	Retail	Books & Media	1,750	44-45	Retail Trade
Sunglass Cove	Lac La Biche Downtown	Retail	Specialty Retail	1,000	44-45	Retail Trade
Generations Eye Care	Lac La Biche Downtown	Other	Health Care & Medical Services	2,000	62	Health Care & Social Assistance
Warehouse One	Lac La Biche Downtown	Retail	Clothing & Apparel	3,500	44-45	Retail Trade
Broker Link Insurance	Lac La Biche Downtown	Other	Finance/Insurance/Real Estate Services	3,500	52	Finance & Insurance
Ace Hardware	Lac La Biche Downtown	Retail	Home Improvement & Gardening	4,400	44-45	Retail Trade
Modern Wears	Lac La Biche Downtown	Retail	Clothing & Apparel	3,400	44-45	Retail Trade
VACANT - 10109 101 Ave	Lac La Biche Downtown	**VACANT**	**VACANT**	**1,600**	**VACANT**	**VACANT**
Café on Main	Lac La Biche Downtown	Retail	Quick Service F&B	1,500	44-45	Retail Trade
VACANT (former Stitchin' Man) - 10105 101 Ave	Lac La Biche Downtown	**VACANT**	**VACANT**	**1,500**	**VACANT**	**VACANT**
Smiley's Furniture	Lac La Biche Downtown	Retail	Home Furnishings & Appliances	12,200	44-45	Retail Trade
ATB Financial	Lac La Biche Downtown	Other	Professional Services	4,300	52	Finance & Insurance
Tattoos	Lac La Biche Downtown	Retail	Personal Services	500	81	Other Services (except for Public Administration)
VACANT (behind ATB on 101 St)	Lac La Biche Downtown	**VACANT**	**VACANT**	**700**	**VACANT**	**VACANT**
VACANT (behind ATB on 101 St)	Lac La Biche Downtown	**VACANT**	**VACANT**	**1,600**	**VACANT**	**VACANT**
IDA Pharmacy	Lac La Biche Downtown	Retail	Pharmacy	5,400	44-45	Retail Trade
Money Mart	Lac La Biche Downtown	Retail	Personal Services	2,400	52	Finance & Insurance
Eats& Sweets Café	Lac La Biche Downtown	Retail	Quick Service F&B	2,400	44-45	Retail Trade
Guardian Pharmacy	Lac La Biche Downtown	Retail	Pharmacy	5,500	44-45	Retail Trade
La Bones Sports Pub	Lac La Biche Downtown	Retail	Drinking Establishments	1,650	72	Accommodation & Food Services

Retail Business Name	Community/Local Area	Retail or Other	General Retail Category	Est. Area (SF)	NAICS Sector #	NAICS Sector Name
Rocky's Restaurant	Lac La Biche Downtown	Retail	Full Service Restaurants	1,650	72	Accommodation & Food Services
Source For Sports	Lac La Biche Downtown	Retail	Sporting Goods	6,400	44-45	Retail Trade
Source For Sports	Lac La Biche Downtown	Retail	Auto/RV/Motorsports Dealership	20,000	44-45	Retail Trade
Taco Bell/KFC	Lac La Biche Downtown	Retail	Quick Service F&B	2,500	44-45	Retail Trade
Oasis Tirecraft	Lac La Biche Downtown	Auto	Auto Parts & Accessories	5,500	44-45	Retail Trade
Mystic Thrift	Lac La Biche Downtown	Retail	Specialty Retail	4,600	44-45	Retail Trade
Northern Lights Public Schools	Lac La Biche Downtown	Other	Professional Services	1,200	91	Public Adminstration
Remax	Lac La Biche Downtown	Other	Professional Services	950	53	Real Estate and Rental & Leasing
Kut n Kurl	Lac La Biche Downtown	Retail	Personal Services	1,500	81	Other Services (except for Public Administration)
Javal Jewelry	Lac La Biche Downtown	Retail	Jewelry & Accessories	1,500	44-45	Retail Trade
Superior Safety	Lac La Biche Downtown	Retail	Specialty Retail	900	44-45	Retail Trade
A1FW Fitness Wellness	Lac La Biche Downtown	Retail	Fitness & Leisure	900	71	Arts, Entertainment & Recreation
Scotiabank	Lac La Biche Downtown	Other	Professional Services	3,060	52	Finance & Insurance
Royal Lepage	Lac La Biche Downtown	Other	Professional Services	1,000	53	Real Estate and Rental & Leasing
Mo's Barber Shop	Lac La Biche Downtown	Retail	Personal Services	500	81	Other Services (except for Public Administration)
Widcat Bar & Grill	Lac La Biche Downtown	Retail	Drinking Establishments	2,150	72	Accommodation & Food Services
JW Kozina Law	Lac La Biche Downtown	Other	Professional Services	1,080	54	Professional, Scientific and Technical Services
CIBC	Lac La Biche Downtown	Other	Professional Services	1,900	52	Finance & Insurance
Omar's Barber Shop	Lac La Biche Downtown	Retail	Personal Services	1,000	81	Other Services (except for Public Administration)
VACANT - 10124 101 Ave	Lac La Biche Downtown	**VACANT**	**VACANT**	**1,000**	**VACANT**	**VACANT**
Law Office	Lac La Biche Downtown	Other	Professional Services	1,700	54	Professional, Scientific and Technical Services
Cooperators	Lac La Biche Downtown	Other	Professional Services	3,300	52	Finance & Insurance
Cascade Flowers & Art	Lac La Biche Downtown	Retail	Specialty Retail	1,800	44-45	Retail Trade
Four Seasons Clothing	Lac La Biche Downtown	Retail	Clothing & Apparel	2,300	44-45	Retail Trade
Great Canadian Liquor Company	Lac La Biche Downtown	Retail	Alcohol & Tobacco	7,900	44-45	Retail Trade
Lakeland Denture Clinic	Lac La Biche Downtown	Retail	Professional Services	1,150	62	Health Care & Social Assistance
Subway	Lac La Biche Downtown	Retail	Quick Service F&B	1,070	72	Accommodation & Food Services
Cold Beer & Wine	Lac La Biche Downtown	Retail	Alcohol & Tobacco	1,300	44-45	Retail Trade
Ricky's All Day Grill	Lac La Biche Downtown	Retail	Full Service Restaurants	6,800	72	Accommodation & Food Services
Country Rock	Lac La Biche Downtown	Retail	Arts & Entertainment	8,800	71	Arts, Entertainment & Recreation
Office	Lac La Biche Downtown	Other	Professional Services	1,400	54	Professional, Scientific and Technical Services
LLB Cold Beer Wine & Spirits	Lac La Biche Downtown	Retail	Alcohol & Tobacco	2,470	44-45	Retail Trade
IGA	Lac La Biche Downtown	Retail	Grocery & Conveniences	21,000	44-45	Retail Trade
Your Dollar Store	Lac La Biche Downtown	Retail	Specialty Retail	5,950	44-45	Retail Trade
Will's Barber Shop	Lac La Biche Downtown	Retail	Personal Services	500	81	Other Services (except for Public Administration)
Sunshine Promotions	Lac La Biche Downtown	Other	NON-RETAIL Streetfront	500	54	Professional, Scientific and Technical Services
Dixie's Photography	Lac La Biche Downtown	Retail	Specialty Retail	500	44-45	Retail Trade
R+R Creative Flooring	Lac La Biche Downtown	Retail	Home Improvement & Gardening	5,200	44-45	Retail Trade
Mo's Billiards	Lac La Biche Downtown	Retail	Arts & Entertainment	5,000	71	Arts, Entertainment & Recreation
The Pet and Farm Shop	Lac La Biche Downtown	Retail	Specialty Retail	4,000	44-45	Retail Trade
VACANT (1st Level)	Lac La Biche Downtown	**VACANT**	**VACANT**	**1,000**	**VACANT**	**VACANT**

Retail Business Name	Community/Local Area	Retail or Other	General Retail Category	Est. Area (SF)	NAICS Sector #	NAICS Sector Name
Game On Golf	Lac La Biche Downtown	Retail	Arts & Entertainment	1,000	71	Arts, Entertainment & Recreation
Budget Floors	Lac La Biche Downtown	Retail	Home Improvement & Gardening	1,780	44-45	Retail Trade
Ginger House	Lac La Biche Downtown	Retail	Full Service Restaurants	3,600	72	Accommodation & Food Services
Dental Clinic	Lac La Biche Downtown	Other	Professional Services	1,500	62	Health Care & Social Assistance
A&W	Lac La Biche Downtown	Retail	Quick Service F&B	1,600	72	Accommodation & Food Services
Oh My Vape Lounge	Lac La Biche Downtown	Retail	Alcohol & Tobacco	1,900	44-45	Retail Trade
VACANT (former Ford Dealership)	Lac La Biche East	**VACANT**	**VACANT**	**24,000**	**VACANT**	**VACANT**
Home Hardware	Lac La Biche East	Retail	Grocery & Conveniences	0	44-45	Retail Trade
Home Hardware	Lac La Biche East	Retail	Alcohol & Tobacco	0		
Home Hardware	Lac La Biche East	Retail	Pharmacy	0		
Home Hardware	Lac La Biche East	Retail	Personal Services	0		
Home Hardware	Lac La Biche East	Retail	Clothing & Apparel	0		
Home Hardware	Lac La Biche East	Retail	Footwear	0		
Home Hardware	Lac La Biche East	Retail	Jewelry & Accessories	0		
Home Hardware	Lac La Biche East	Retail	Health & Beauty	0		
Home Hardware	Lac La Biche East	Retail	Home & Personal Electronics	543		
Home Hardware	Lac La Biche East	Retail	Home Furnishings & Appliances	3,255		
Home Hardware	Lac La Biche East	Retail	Home Improvement & Gardening	17,360		
Home Hardware	Lac La Biche East	Retail	Books & Media	0		
Home Hardware	Lac La Biche East	Retail	Sporting Goods	0		
Home Hardware	Lac La Biche East	Retail	Toys & Hobbies	0		
Home Hardware	Lac La Biche East	Retail	Specialty Retail	0		
Home Hardware	Lac La Biche East	Retail	Quick Service F&B	0		
Home Hardware	Lac La Biche East	Retail	Full Service Restaurants	0		
Home Hardware	Lac La Biche East	Retail	Arts & Entertainment	0		
Home Hardware	Lac La Biche East	Retail	Fitness & Leisure	0		
Home Hardware	Lac La Biche East	Retail	Auto Parts & Accessories	543		
Lucky's Chinese Restaurant	Lac La Biche East	Retail	Full Service Restaurants	2,500	72	Accommodation & Food Services
Fiddler's Convenience	Lac La Biche East	Retail	Grocery & Conveniences	2,500	44-45	Retail Trade
Fiddler's Laundromat	Lac La Biche East	Retail	Personal Services	750	81	Other Services (except for Public Administration)
Bowling	Lac La Biche East	Retail	Arts & Entertainment	17,100	71	Arts, Entertainment & Recreation
Beaverhill Liquor	Lac La Biche East	Retail	Alcohol & Tobacco	2,000	44-45	Retail Trade
Shell Convenience	Lac La Biche East	Retail	Grocery & Conveniences	2,000	44-45	Retail Trade
Firestone Pizza	Lac La Biche East	Retail	Full Service Restaurants	1,500	72	Accommodation & Food Services
BOLD Development Future	Lac La Biche East	**VACANT**	**VACANT**	**8,000**	**VACANT**	**VACANT**
Independent Grocer	Lac La Biche Midtown	Retail	Grocery & Conveniences	39,000	44-45	Retail Trade
Jiggers Pub	Lac La Biche Midtown	Retail	Drinking Establishments	2,400	72	Accommodation & Food Services
Mac's Grill	Lac La Biche Midtown	Retail	Full Service Restaurants	3,000	72	Accommodation & Food Services
Terrabin Chrysler	Lac La Biche Midtown	Auto	Auto/RV/Motorsports Dealership	15,000	44-45	Retail Trade
Lakeland Shell Convenience	Lac La Biche Midtown	Retail	Grocery & Conveniences	1,000	44-45	Retail Trade
Petro Canada Convenience	Lac La Biche Midtown	Retail	Grocery & Conveniences	1,500	44-45	Retail Trade

Retail Business Name	Community/Local Area	Retail or Other	General Retail Category	Est. Area (SF)	NAICS Sector #	NAICS Sector Name
OK Tire	Lac La Biche Midtown	Auto	Auto Parts & Accessories	5,500	44-45	Retail Trade
Tom's Pizza & Steakhouse	Lac La Biche Midtown	Retail	Full Service Restaurants	8,500	72	Accommodation & Food Services
Squirrels Fas Gas Plus	Lac La Biche Midtown	Retail	Grocery & Conveniences	1,700	44-45	Retail Trade
Space Dock Burgers/Shakes/Fries	Lac La Biche Midtown	Retail	Full Service Restaurants	1,150	72	Accommodation & Food Services
Esso Convenience	Lac La Biche Midtown	Retail	Grocery & Conveniences	2,380	44-45	Retail Trade
UFA Convenience	Lac La Biche South	Retail	Grocery & Conveniences	2,000	44-45	Retail Trade
VACANT Restaurant Pad	Lac La Biche South	**VACANT**	**VACANT**	**5,900**	**VACANT**	**VACANT**
Boston Pizza	Lac La Biche West	Retail	Full Service Restaurants	6,100	72	Accommodation & Food Services
Timber Mart	Lac La Biche West	Retail	Home Improvement & Gardening	9,000	44-45	Retail Trade
Sapphire Auto Industrial & Truck Supplies	Lac La Biche West	Auto	Auto Parts & Accessories	21,600	44-45	Retail Trade
Castle Building Supplies	Lac La Biche West	Retail	Home Improvement & Gardening	14,800	44-45	Retail Trade
Coop Grocery	Plamondon	Retail	Grocery & Conveniences	18,000	44-45	Retail Trade
Coop Hardware & Agro	Plamondon	Retail	Home Improvement & Gardening	7,600	44-45	Retail Trade
Bumper to Bumper Auto Supplies	Plamondon	Auto	Auto Parts & Accessories	3,800	44-45	Retail Trade
Liquor Store	Plamondon	Retail	Alcohol & Tobacco	1,300	44-45	Retail Trade
Tavern/Restaurant	Plamondon	Retail	Full Service Restaurants	3,000	72	Accommodation & Food Services
Creative Edge & Fabrics	Plamondon	Retail	Specialty Retail	1,000	44-45	Retail Trade
Chic Boutique	Plamondon	Retail	Clothing & Apparel	500	44-45	Retail Trade
Double Confectionary	Plamondon	Retail	Grocery & Conveniences	1,750	44-45	Retail Trade
VACANT - freestanding	Plamondon	**VACANT**	**VACANT**	**1,550**	**VACANT**	**VACANT**
VACANT - specialty retail	Plamondon	**VACANT**	**VACANT**	**500**	**VACANT**	**VACANT**
VACANT - specialty retail	Plamondon	**VACANT**	**VACANT**	**500**	**VACANT**	**VACANT**
ATB Financial	Plamondon	Other	Finance/Insurance/Real Estate Services	2,300	52	Finance & Insurance
Servus Credit Union	Plamondon	Other	Finance/Insurance/Real Estate Services	3,050	52	Finance & Insurance

Resident Spending / Economic Leakage Questionnaire

Introduction:

Intro 1:

Hello, my name is _*insert_name*_, may I speak with the person in the household with the most recent birthday that is above the age of 18? [If asked why, refer to Intro 2]

Intro 2:

[Reintroduce yourself] I'm calling on behalf of Lac La Biche County to understand local resident shopping preferences. This will help the County to identify what kinds of businesses to try and attract to the Lac La Biche and/or Plamondon that people are asking for. Please be assured we are not calling to sell you anything. We only want the opinions of local residents. The survey should not take more than five to eight minutes to finish, and your responses will be completely confidential.

Question 1

In an average month, how much do you spend on retail purchases including entertainment, online shopping, restaurants and personal services such as hair and beauty, auto-repair, veterinary or other services?

a) Between $1 and $499
b) $500-$999
c) $1,000-$1,4999
d) $1,500-1,999
e) $2,000 or greater
e) $0…I didn't make any retail purchases (Thank and Terminate)

A Question 2

Of the above amount, what percentage would you say is spent on day-to-day purchases such as groceries, gasoline, and pharmaceuticals compared to bigger ticket items, such as clothing, appliances, entertainment, restaurants, and such?

______________ (enter value between 1-100%)

Question 3

Thinking about the estimated total expenditures that you mentioned before, what percentage of those are spent in Lac La Biche County, online and/or outside of town?

a) ___________ (Local spending - code response between 0 and 100 percent)
b) ___________ (Online spending - code response between 0 and 100 percent)
c) ___________ (Outside Lac La Biche County- code response between 0 and 100 percent)

Question 4

And now I'd like you to tell me what percentage of your retail expenditures are made in Lac La Biche County, online, or outside of Lac La Biche County **for a series of specific categories in and average month**. If you didn't buy anything in a category, just let me know. What percentage of spending on [enter question category – random generation] was done in Lac La Biche County [enter 1 to 100]? How about online [enter 1 to 100]? How about somewhere outside of Lac La Biche County [enter 1 to 100]? [also include "Didn't purchase anything in this category option"]

Convenience Categories

a) Grocery/specialty foods/floral
   i. _____________ (Code response between 0 and 100 percent **LOCAL SPENDING**)
   ii. _____________ (Code response between 0 and 100 percent **ONLINE SPENDING**)
   iii _____________ (Code response between 0 and 100 percent **OUTSIDE LAC LA BICHE COUNTY)**
   iv. Didn't purchase anything in this category

b) Alcohol & Tobacco
c) Pharmacy (prescription and over-the-counter)
d) Health and beauty (fitness, barber, beauty salon, spa)
e) Personal/household services (eye glasses/lens, travel agent, post office/courier, dry cleaning/laundry, veterinarian, plumber, etc.)
f) Health services (doctor, dentist, optometrist)
g) Financial/professional services (banking, insurance, legal, accounting)

Comparison/DSTM Categories

h) Clothing, Apparel & Footwear
i) Jewellery and accessories
j) Home & Personal electronics/appliances
k) Home furnishings/accessories
l) Hardware and home improvement
m) Books and multimedia
n) Sporting goods
o) Toys and hobbies
p) Full service restaurants (provide examples such as Brown's Social House, Original Joes etc.)
q) Fast food restaurants & cafes (provide examples such as Subway, Tim Hortons, Starbucks, etc.)
r) Family entertainment & leisure (provide examples such as movie theatres, bowling alleys, etc.)
s) Auto, RV & Motorsports Dealerships
t) Auto Parts, Maintenance & Accessories

Question 5

[If Q2 is less than 100% ask Q5 otherwise skip to Q6]:

What is the primary reason why you shop outside of Lac La Biche County? (Code one response only)

a) Preference/habit (work in other municipality/work outside the Lac La Biche County)
b) Easy commute to other regional retail centres
c) More attractive/appealing retail experience
d) Better selection/quality/customer service
e) Better prices
f) Close to other amenities/services not available in Lac La Biche County
g) Store not available in Lac La Biche County
h) Bigger store available elsewhere
i) Other regional retail centres heavily advertised/promoted
j) Other Specify: _________

Question 6

[*Ask only if Q3 is less than 100%]*
What new types of stores, services and/or restaurants would increase your visits and spending in Lac La Biche County? **(List the store types and/or specific store names)**

Question 7

[*Ask only if Q3 is less than 100%]*
What new types of stores, services and/or restaurants would increase your visits and spending in the Lac La Biche County?

Question 8

Where do you and the other employed members of your household work? [*Record response for each employed member of the household*] Please identify the location of work for each employed household member.

a) Lac La Biche County
b) Athabasca County
c) Smoky Lake County
d) Thorhild County
e) Fort-MacMurray
f) Other, please specify: [record response]

That's all the questions we have. Thank you for your time. [end survey]

Lac La Biche County
welcoming by nature.

key planning strategies

MDB INSIGHT