Retail Gap Analysis

City of Lloydminster

October 2022

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architecture
interior design
planning

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Development Strategists

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Land Acknowledgment

We acknowledge that the City of Lloydminster is located on Treaty 6 Territory which encompasses the traditional lands of the Metis, Dene Suliné, Cree, Nakota Sioux and Saulteaux peoples. We are all treaty people.

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Preface

Fowler Bauld & Mitchell Ltd. ("FBM") was commissioned by the City of Lloydminster ("Lloydminster") to prepare a Retail Gap Analysis. The study was carried out over the period of May to October 2022 and also included the assistance of Preferred Choice Development Strategists ("Preferred Choice") for Stakeholder outreach. Stakeholder meetings, interviews, and an on-line survey were undertaken, with on-the-ground fieldwork conducted in May 2022.

The objective of the analysis was to assess the current and future retail and commercial opportunities for Lloydminster. Taking a collaborative approach, the consultant team analyzed the business inventory and retail sales patterns in Lloydminster by quantifying voids and gaps, and determining sectors exhibiting "leakage" and "surplus". This comprehensive analysis resulted in a strategy that will give existing and new retailers an understanding of the relative strengths and weaknesses of Lloydminster's retail market. The study may also contribute to the Comprehensive Growth Strategy Update currently underway to guide future annexation decisions.

For the purposes of identifying the business counts by business category, FBM applied its own business classifications for retail and services to provide additional depth to the overall analysis. In doing so, FBM still recognizes and attempts to adhere to the North American Industry Classification System (NAICS) designations as provided in the City's business registry. We do recognize, however, that some deviations exist based on our professional interpretation of the business typology, but these are minimal.

This analysis was conducted by FBM as an objective and independent party. As is customary in an assignment of this type, neither our name nor the material submitted may be included in a prospectus, or part of any printed material, or used in offerings or representations in connection with the sale of securities or participation interest to the public, without the expressed permission of the City of Lloydminster or FBM.

FBM

2022

All images are attributable to FBM unless otherwise noted.

Glossary of Terms & Acronyms

Acronyms and retail industry terminology used throughout this document are defined as follows:

ACRONYMS

AADT - Average Annual Daily Traffic
CRU - Common Retail Unit
DSTM - Department Store Type Merchandise
F&B - Food & Beverage
ICSC - International Council of Shopping Centers
PTA - Primary Trade Area
STA - Secondary Trade Area
WAADT - Weighted Average Annual Daily Traffic

INDUSTRY & CATEGORY TERMINOLOGY

sf - square feet
psf - per square foot
$ psf - dollars per square foot (an industry standard measure of annualized retail sales productivity)
Comparison Merchandise - Comparison Merchandise is an industry term often synonymous with Department Store Type Merchandise (DSTM) and includes categories such as Fashion, Home Decor, Appliances and Electronics, Sporting Goods, etc, or categories that are typically found in more traditional "mall" or shopping centre environments.
Quick Service F&B - This represents fast food, grab-and-go, take-out only, or drive through types of restaurants, such as McDonald's, Tim Horton's or other cafe/coffee shops.
Full Service F&B - This represents restaurants or pubs that include table service seating or servers for meals and beverages.
Specialty Retail - This category of retail typically is a "catch-all" for a wide range of store types such as pet foods, arts & crafts, cellular phones, office supplies/stationery, etc.
Omnichannel Retail - A business model in which all existing channels (physical, online, digital) become integrated and leveraged across devices to influence a customer's purchasing decision. Because the customer journey is no longer a linear experience and now includes multiple touchpoints, omnichannel retail aims to provide a seamless shopping experience regardless of where the customer is (online or in-store), what device they are using (mobile or desktop), and what channel they are accessing content from (email, site, mobile app).

Executive Summary

Scope of Study

The objective of this study was to conduct a Retail Gap Analysis in the City of Lloydminster to assess the current and future retail and commercial opportunities for the city. The consultant team has produced a refined ground-floor Master Business Inventory as well as a realistic Trade Area for the retail market. By comparing the available retail supply against the present retail demand, the team has completed a comprehensive analysis and presented a strategy that will give entrepreneurs, along with existing and new retailers, a snapshot of the relative strengths and weaknesses of Lloydminster's retail market.

Regional Context

Lloydminster is about half-way between Edmonton (250km west) and Saskatoon (275km east) and boasts a unique geographic trait among cities in Canada: it is a city located in two provinces. The border running down the city centre became official in 1905 when the Fourth Meridian was chosen to separate Alberta and Saskatchewan[1]. Of the 31,582 city residents recorded in the 2021 census, 62.5% live on the Alberta side while 37.5% call the Saskatchewan side home (19,739 and 11,843 respectively)[2].

Highway 16 and 17 are key transportation routes for the City of Lloydminster with Yellowhead Highway 16 connecting the City with Edmonton and Saskatoon. Looking at the shared border between Alberta and Saskatchewan, the northern portion of Highway 17 sees higher traffic volumes than the southern portion which validates that visitors to the City often come from the north.

Within the City, the Lloydminster Municipal Airport now hosts regular Westjet flights to Calgary, while KCTI Travels provides regional passenger bus services between Edmonton, AB and Prince Albert, SK with service to Lloydminster, North Battleford, and Vermilion.

Further evidence of Lloydminster's regional appeal was derived from mobile phone data. As part of this Gap Analysis, mobile phone tracking data was used to determine where Lloydminster visitors originate from. Data was provided by Manifold Data Mining Inc and represents people who stopped in Lloydminster between June-August 2021.

1. Lloydminster Downtown Area Redevelopment Plan, 2020
2. Lloydminster, Census Profile, 2021 Census of Population, Statistics Canada

This data revealed a significant number of visitors from Edmonton, Red Deer and Calgary as well as Saskatoon and Regina, and other clusters from southwestern British Columbia, as well as in and around Greater Toronto. Lloydminster's location makes it a perfect stop for the very strong "rubber tire" visitor segment.

Retail Trade Area

Proximity to major urban centres and established transportation routes were core considerations for the creation of Lloydminster's two trade areas. The majority of consumers originate from Lloydminster's Primary Trade Area (PTA) which is oriented toward the north west within a two hour drive time. The PTA reflects Lloydminster's position as a service centre for smaller nearby communities including Cold Lake, AB; Innisfree, AB; Macklin, SK; and Maidstone, SK. The PTA is larger than the trade area identified in the 2019 Northeast ASP Market Study which included communities less than a 30 minute drive from Lloydminster.

Primary Trade Area: Estimated for the year-end 2021, the population of the Primary Trade Area is 136,363 and is projected to grow by 0.82% annually over the next three years. The PTA is demographically similar to Alberta with a slightly higher percentage of people under the age of 14 and a slightly lower percentage of people aged 65 and over. The average household income of the PTA is $131,395 which is lower than the Alberta average of $152,656. The household income breakdown for the PTA is comparable to Alberta with a slightly lower percentage of earners over $100,000.

Total aggregate retail spending for 2021 in the Primary Trade Area was $1.6 billion excluding health care and auto. Grocery, Convenience and Specialty Foods represent the highest household spending category at $8,828 which represents 29% of the spending potential.

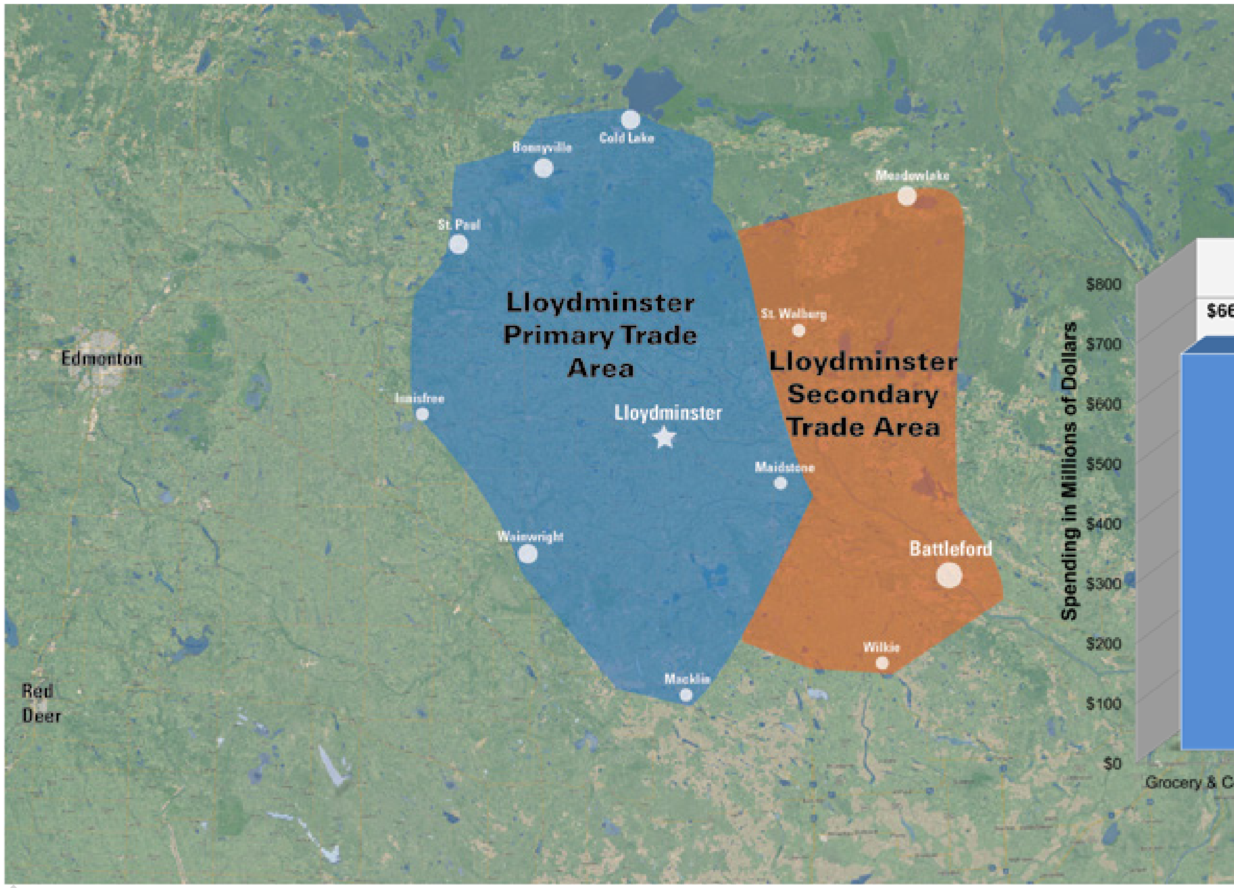
Secondary Trade Area: Estimated for the year-end 2021, the population of the Secondary Trade Area is 52,866 and projected to grow by 0.54% annually over the next three years. Demographically, the STA more closely resembles Saskatchewan than Alberta with a relatively high percentage (35.08%) of its population under the age of 24 compared to 30.54% in Alberta and 31.86% in Saskatchewan. The average household income of the STA is $92,923 which is lower than both the Alberta ($152,656) and Saskatchewan ($111,182) averages.

Lloydminster's STA represents 24% of the overall retail spending. Total aggregate retail spending for 2021 was $533.6 million excluding health care and auto. Similar to the PTA, household spending amongst STA residents was highest among the categories of Grocery, Convenience and Specialty Foods ($7,375).

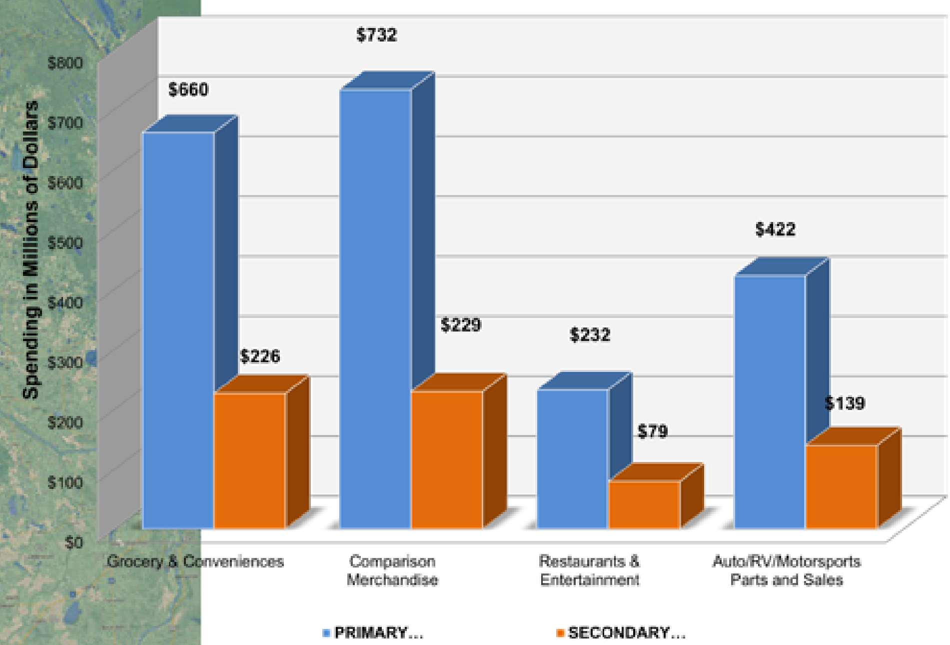
These demographic and spending profiles suggest family forming demographic that places a priority on value as represented by the facing lifestyle summary.

Lloydminster Trade Area Dominant Lifestyle Demographic

Lloydminster Retail Trade Areas



Lloydminster Retail Trade Area Spending (2021 y/e)



Inventory Summary

Retail and commercial activity in Lloydminster primarily takes place in eight (8) retail nodes, seven of which are true defined nodes located along the two intersecting highways (Highways 16 and 17) and one of which represents three separate and much smaller neighborhood-scale commercial nodes referred to as Neighbourhood Nodes.

Lloydminster has a total of about **2.6 million sf of retail-specific floorspace** and almost 4.48 million sf of total floorspace including office uses and vacant spaces. Of the retail businesses, just over a quarter are local businesses (26%) while about three quarters (74%) are larger retail brands. The average size of branded stores is almost double the average size of local stores (8,268 sf branded versus 3,462 sf local) across all nodes.

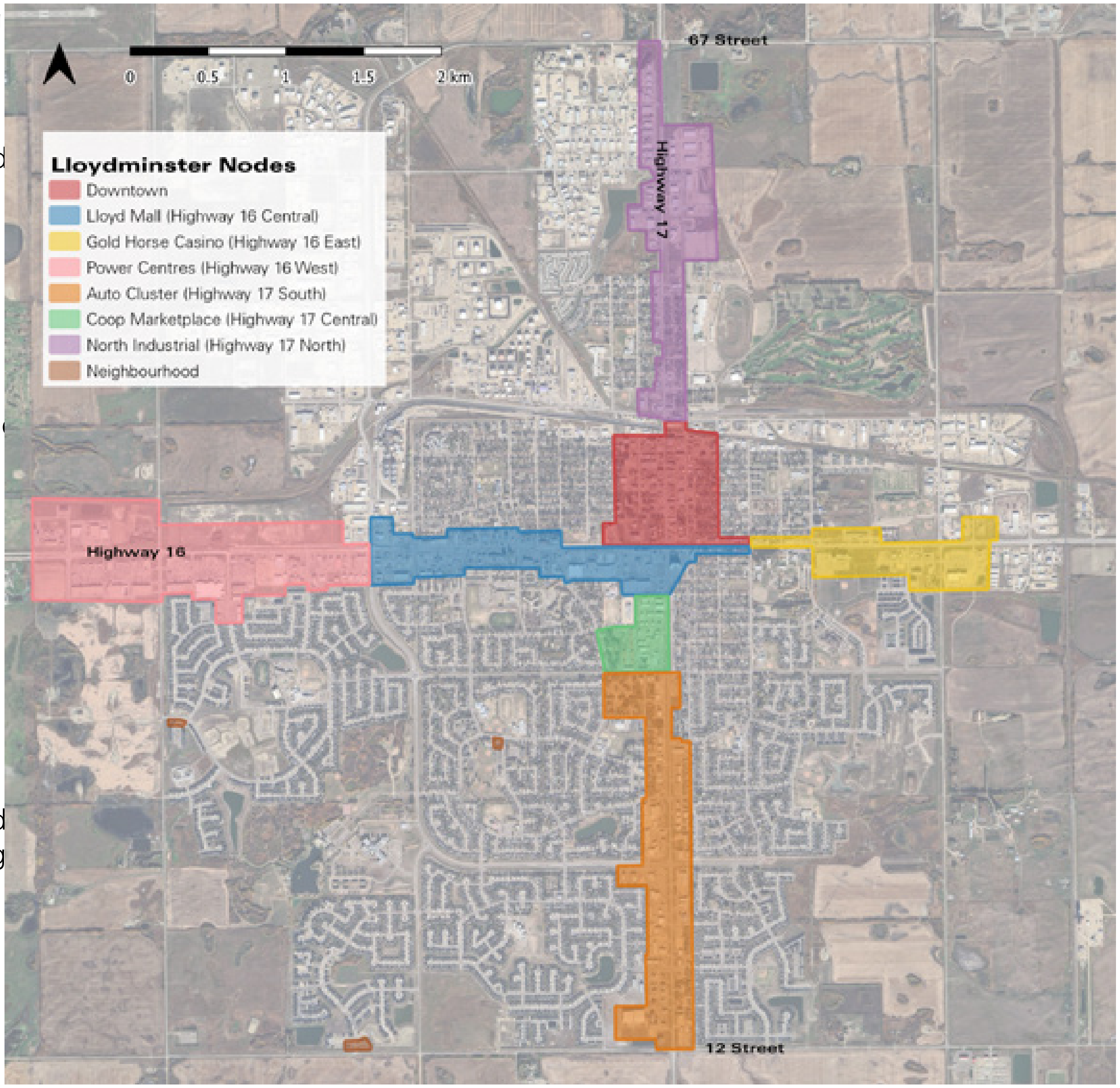
The overall city average retail sales productivity is relatively healthy at an estimated average of $333 per sf. For a community of Lloydminster's size and large retail offering ,a retail sales productivity in greater than $300 per sf is considered strong. In looking at each node, it will be observed which nodes are estimated to be performing at, above or below this overall citywid average. This productivity level is despite higher than average vacancies in the market, which suggests that Lloydminster should carefully manage expectations for any new large scale development or retail expansion.

Current vacancy overall for Lloydminster sits at 7.8% which is higher than the industry standard which should be in the range of 3% to 5%. This higher than average vacancy includes the former notable spaces or nodes:

- Canadian Tire - 65,972 sf (of note is that Canadian Tire is relocating into a larger brand new building, so this space could be subdivided for smaller junior box retailers or a possible sing user)
- Lloyd Place Mall 45,208 sf
- Downtown - 58,957 sf

Vacancies represent a present day challenge for Lloydminster suggesting that future demand and targeted retailers should be presented with opportunities to backfill current vacancies where possible before looking at new building or development. With a trend for larger retailers downsizing their existing formats, it is even more important to leverage the current vacancies to try and find compatible locations for retailers.

Lloydminster Retail Nodes



Lloydminster Citywide Total Retail Inventory

MERCHANDISE CATEGORY	TOTAL FLOORSPACE (sq. ft.)	TOTAL MIX (%)
PROFESSIONAL, MEDICAL & FINANCIAL	728,531	16.3%
HOME IMPROVEMENT & GARDENING	371,385	8.3%
VACANT	351,388	7.8%
GROCERY, CONVENIENCE & SPECIALTY FOODS	337,828	7.5%
FASHION & FOOTWEAR	261,267	5.8%
AUTO SERVICE	251,212	5.6%
AUTO/RV/MOTORSPORTS DEALERSHIP	175,846	3.9%
SPECIALTY RETAIL	159,390	3.6%
QUICK SERVICE F&B	151,661	3.4%
FULL SERVICE RESTAURANTS & PUBS	143,752	3.2%
HOME FURNITURE & DÉCOR	141,109	3.1%
AUTO PARTS & ACCESSORIES	132,842	3.0%
ALCOHOL, TOBACCO & CANNABIS	93,720	2.1%
PERSONAL SERVICE	93,719	2.1%
BEAUTY & WELLNESS	91,144	2.0%
ELECTRONICS & APPLIANCES	88,919	2.0%
ARTS & ENTERTAINMENT	87,036	1.9%
FITNESS & LEISURE	82,877	1.9%
SPORTING GOODS & OUTDOOR RECREATION	81,367	1.8%
TOYS & HOBBIES	59,460	1.3%
PHARMACY	41,995	0.9%
JEWELRY & ACCESSORIES	19,034	0.4%
BOOKS, MEDIA & COMPUTERS	10,280	0.2%
TOTAL	**4,479,703**	**100.0%**
Retail Floorspace Excluding Non-Retail (Professional/Medical/Tourism/Light Industrial/Auto Service/VACANT)	**2,624,632**	**59%**
Total Estimated Retail Sales Excluding Non-Retail (Professional/Medical/Tourism/Light Industrial/Auto Service/VACANT)	**$872,866,002**	
Estimated Retail Sales Productivity ($/sf)	**$333**	

With respect to the overall citywide retail mix, the top 5 retail-specific merchandise categories include the following:

1. Home Improvement & Gardening 371,385 sf
2. Grocery, Convenience & Specialty Foods 337,827 sf
3. Fashion & Footwear 261,267 sf
4. Auto/RV/Motorsports 175,846 sf
5. Specialty Retail 159,390 sf

Although there are some dominant categories, Lloydminster is unique among a lot of other comparably sized cities, in that it has a quite wide and strong representation across almost all merchandise categories, which is testament to the strong regional draw that Lloydminster has established. The largest share of Full Service Restaurants & Pubs square footage is split almost equally between the Lloyd Mall and Power Centres nodes. .

Demand Summary

The amount of forecast retail demand can be variable depending upon whether Lloydminster is able to garner continued levels of Trade Area market share spending, or if it is able to garner and increase share of Trade Area spending.

The result can result in demand forecast over the next decade of between 571,749 sf to 966,701 sf. Not all of this demand has to, nor should it be accommodated in new greenfield development as this would run the distinct risk of creating an over-retailed market and also make tenant/retailer attraction challenging. Growing market would though however present more opportunity for expansion and support of retail, particularly in areas like the Lakeside and Wigfield ASPs.

Rather, the most pragmatic approach to accommodating demand is to look within a large component of existing zoned lands and properties where vacancies exist, thereby reducing the pressure to create unnecessary surplus zoned land or even require further annexation.

When looking at the respective nodes, the following observations can be considered with respect to the appropriate and compatible floorspace allocation and resulting land needs.

Lloydminster Forecasted Demand Allocation (2031)

Retail Node	Total 10-yr New Demand by 2031 with CURRENT Market Share (sf / acres)		Lloydmister % Share of Demand	Share of Demand (sf)	Land Utilization Factor	Net Land Area (acres)
Total	**571,749**	**35.4**	**100%**	**571,749**	**0.37**	**35.4**
Downtown			5.0%	28,587	1.0	0.7
Lloyd Mall (Hwy 16 Central)			10.0%	57,175	0.9	1.5
Gold Horse Casino (Hwy 16 East)			25.0%	142,937	0.3	10.9
Power Centres (Hwy 16 West)			35.0%	200,112	0.3	15.3
Auto Cluster (Hwy 17 South)			3.0%	17,152	0.7	0.6
Coop Marketplace (Hwy 17 Central)			2.0%	11,435	0.7	0.4
North Industrial (Hwy 17 North)			5.0%	28,587	0.3	2.2
Neighbourhood (incl Lakeside ASP)			15.0%	85,762	0.5	3.9

Retail Node	Total 10-yr New Demand by 2031 with INCREASED Market Share (sf / acres)		Lloydmister % Share of Demand	Share of Demand (sf)	Land Utilization Factor	Net Land Area (acres)
Total	**966,701**	**64.3**	**100%**	**966,701**	**0.34**	**64.3**
Downtown			5.0%	48,335	1.0	1.1
Lloyd Mall (Hwy 16 Central)			10.0%	96,670	0.9	2.5
Gold Horse Casino (Hwy 16 East)			30.0%	290,010	0.3	22.2
Power Centres (Hwy 16 West)			25.0%	241,675	0.3	18.5
Auto Cluster (Hwy 17 South)			3.0%	29,001	0.7	1.0
Coop Marketplace (Hwy 17 Central)			2.0%	19,334	0.7	0.6
North Industrial (Hwy 17 North)			5.0%	48,335	0.3	3.7
Neighbourhood (incl Lakeside ASP)			20.0%	193,340	0.3	14.8

Downtown Node - There is not expected to be considerable need, nor is there a considerable amount of land available other than smaller vacant infill lots or that which may come from redevelopment, which could create more efficient use of existing land. Therefore, the resulting land utilization factor would be closer to 1.0 meaning that there should not be a need for surface parking or if there is parking it may be accommodated in a level below grade.

The key to Downtown's recovery is promoting and enabling mixed-use development formats that include retail on the street frontage and either residential or commercial above, particularly within the more compact core of the Downtown. In more peripheral parts of the Downtown it would be advised to only permit residential not commercial on the street level. This would avoid unnecessarily creating competitive space. The total commercial mix could be in the range of 28,000 to 50,000 sf and only approximately 1 ac of more efficient, higher quality and therefore leaseable space.

Lloyd Mall Node - The mall itself has a large number of vacancies that could already accommodate a fair share of the approximate 57,000 to 97,000 sf of floorspace demand. Additionally, other properties like the vacancy beside The Brick should play a role. In terms of bare land, there are still out parcels available in Choice REIT's property. On this basis, very limited amount of new land in the range of 1.5 to 2.5 ac would be required in the Lloyd Mall Node to accommodate a fair share of future retail demand.

The Lloyd Mall may also consider further intensification of its surplus surface parking for further parcels of multi-unit CRU space to mirror that which is occurring on the Choice REIT neighbouring property.

Gold Horse Casino Node - Although on the Saskatchewan side of the City and opposite to the area of most significant recent retail development, this node represents a strategic opportunity to accommodate a more than fair share of future demand within the Wigfield ASP. The destination draw of the Casino, along with the future relocation of the arena will create an opportunity to provide retail development that could service east side residents, but also provide a compelling draw for residents further away in North Battleford, Cold Lake or Meadow Lake. One of the challenges of the node is the presence of the Husky "blast zone" which limits the amount of residential development in the area.

That said, a retailer like Costco could be pursued for this area as they are not as reliant on a directly proximate population base and they do draw regionally. This regional play could work well with the Casino and new arena, in a similar way that Costco's location in West Edmonton benefits from its proximity to the River Cree Casino while residential growth is predominantly only to its east. The impact of having a possible Costco in the east side of Lloydminster could work to balance retail as well as traffic on the very busy west side of the city along Highway 16. Additionally, Costco could help to catalyze supportive retail development.

Since this area is less developed, the need for land could be in the range of 11 to 22 ac in order to accommodate approximately 142,000 to 290,000 sf.

Power Centres Node - This is the strongest retail node in the City and with the recent opening of the new, larger Canadian Tire, it is expected that the area will continue to be a big draw from compatible, mostly branded and new-to-market retailers. Examples of retailers that could be drawn to this area include the likes of London Drugs or Value Village and while Costco may consider this area, as noted they do not necessarily need the presence of the current anchors as much as other smaller junior box of smaller branded retailers.

In terms of future demand over the next decade it is reasonable to forecast that this will continue to be the dominant node and could accommodate between 200,000 sf (based on varying degrees of market share) and approximately 15 ac of land. There is currently a larger vacant land stock available on the north side of Highway 16 as part of the Hill Industrial ASP, which already has an access point and intersection alignment with opposite commercial. Additionally, internal access could be made available with a parallel internal road from RONA and Princess Auto. This area is recommended to be an area within which future commercial should be targeted. Other land further west pushing up against County land is also considered viable. The most important consideration for this area is to avoid continued sprawl if possible and focus on concentrating the retail more efficiently along this 'gateway' corridor.

Auto Cluster Node - As noted previously in the node overview, this cluster is older in look and feel, with the exception of the area immediately around the Servus Centre. Over time this area could benefit from a better intensification of land use, particularly if some of the auto dealerships were to relocate elsewhere. On this basis, the land utilization should strive to be higher than what it currently is and strategic, more dense infill developments should be pursued. This is why the overall need for new land is kept to a minimum along this corridor in favor of retail floorspace in the range of only 17,000 to 29,000 sf of new retail. The lands immediately south of the Auto Cluster Node, likely have commercial components, but these should be kept to a neighbourhood scale rather than anything larger.

Coop Marketplace Node - There is not likely to be much change in this area with respect to new retail or land. Recent developments behind Coop are a good use of land in terms of scale and appropriateness for a diverse range of businesses. The single biggest variable for this node is whether the current Coop, with its strong customer catchment and desire to expand would consider relocating to another node or area in the community or if it would consider expanding on site and thus better utilizing its existing lands. This would likely result in a loss in parking, but the shopping centre could be considered over-parked as it is and therefore consideration should be given to relaxing parking requirements if it were to enable expansion rather than relocation of the Coop.

North Industrial Node - As noted in the Northeast ASP, there is an opportunity to provide a small, compatible allotment of commercial or retail land as part of this ASP. The appropriate allocation could be in the range of 28,000 to 48,000 sf of mixed-commercial and business services requiring approximately 2 to 4 acres because of the vehicle dominant nature of the area and likely need to provide sufficient land for larger vehicles and circulation.

Neighourhood Nodes - Continued residential development, particularly in the west near to the Lakeland College or within the Lakeside ASP presents an opportunity for further community-scale retail development that could be in the range of 100,000 sf. Similarly, other future proposed residential communities south near the Servus Centre should also have a provision for smaller neighbourhood retail shops and services, also in the range of 15,000 to 20,000 sf.

In the case of the Lakeside ASP, the approved document indicates and allocation of approximately 37 acres for commercial land, which far exceeds the forecasted 10-year demand. That said, longer term growth for 20 plus years may grow into this, but caution needs to be practiced so as to not overbuild. One scenario that could benefit the community and be most compatible in terms of its local desirability and leasability for local businesses would be if a brand like Costco were to locate in the Gold Horse Casino node, then this might open the opportunity for Coop to expand and relocate in Lakeside to anchor the commercial and mixed-use development, in a way that a user like Costco is less likely to advocate or facilitate.

In Lloydminster, the current provision and locations of established grocery stores is appropriate for the size of Lloydminster, and should consider the potential impact that another market entrant could have on the existing distribution of grocery market share in the community. By having Coop relocate and expand, they would likely gain customers and provide a positioning that matches the residential development and resident buyer profile of the local area.

Business Targeting & Attraction Summary

The targeting and attraction is based on identifying a very specific mix and niche of retailers, as well as retail typologies that fit the vision of the city and the postpositions of each respective node.

An important consideration for Lloydminster, because of its large regional presence and draw is to work with the businesses on establishing a greater market share penetration of the overall Trade Area. By incrementally working to increase the market share of available Trade Area household spending, retailers will continue to see the value in locating a physical store in Lloydminster. The demographics, spending, available land and vacancies in Lloydminster suggests that the following retailers represent opportunities over the next 10 years, although it is acknowledged that retailers are always adapting and changing their locational site criteria or formats to fit with changing economics and spending patterns, particularly e-commerce.

Near term (<5yrs)

- Costco
- London Drugs
- Value Village
- Wine & Beyond
- Everything Wine & More
- Goodlife Fitness

Long term (>5yrs)

- No Frills
- Fresh Co
- Fresons
- Bass Pro/Cabelas
- Decathlon Sporting
- Keg Restaurant
- Mr. Mike's Casual Steakhouse

Action Plan Summary

The action items presented below represent considerations that would contribute to the attraction and retention of retail businesses in Lloydminster.

Strengthen Existing Offering

- Create zoning and possible concept plan to enable commercial development in Gold Horse Casino Node in the range of 200,000 sf
- Concentrate a fair share of new retail development within established nodes through infill (e.g. power centres node north of Hwy 16).
- Proactively market quality vacancies and track upcoming vacancies (eg current Canadian Tire store) and consider interim temporary uses, such as indoor skate park or bike park.
- Establish a public transit pilot program between commercial nodes and residential areas for workers and shoppers alike.
- Consider visioning and branding exercise to confirm and implement desired regional identify as a regional convention and meeting centre
- Weigh the pros and cons of conducting a tourism suitability analysis given current and planned natural, community and cultural assets.
- Partner with local First Nations, Heart of Treaty 6 Reconciliation group and SaskMetis Economic Development Corporation to identify mutually beneficial economic opportunities, including supports for entrepreneurs, established business owners and authentic cultural tourism operators.

Prioritize Downtown Revitalization

- Consider storefront improvement program concentrated downtown and consider additional community improvement style grants geared toward improving existing vacancies.
- Prioritize a smaller pilot project area for streetscaping or storefront improvements to create a concentrated visual impact and consider creating an "open street" (i.e. closed to vehicles) for pedestrians only in the Downtown.
- Continue to support the revitalization of downtown as outlined through the Downtown Area Redevelopment Plan.
- Consider zoning in the periphery of the Downtown that is multi-unit residential only and excludes a requirement for mixed-use with retail or commercial on the street.

Support neighbourhood commercial

- Encourage small (i.e. less than 20,000 sf) commercial developments which serve the everyday needs of residents in neighbourhood nodes.
- Maintain the neighbourhood orientation and scale of existing and future neighbourhood zones by encouraging regionally oriented retailers to locate along the City's established nodes

1.0 Introduction

1.1 Scope of Study

The objective of this study was to conduct a Retail Gap Analysis in the City of Lloydminster to assess the current and future retail and commercial opportunities for the city. The consultant team has produced a refined ground-floor Master Business Inventory as well as a realistic Trade Area for the retail market. By comparing the available retail supply against the present retail demand, the team has completed a comprehensive analysis and presented a strategy that will give entrepreneurs, along with existing and new retailers, a snapshot of the relative strengths and weaknesses of Lloydminster's retail market.

1.2 Report Structure

This report contains the following sections:

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

Section 2 - Regional and Local Context: Lays out important regional and local context factors including geographic location, regional access, traffic counts, along with a review of relevant plans and studies.

Section 3 - Trends: Provides an overview of retail and commercial trends shaping consumer, tenant and investor sentiment and actions.

Section 4 - Trade Area: Identifies and defines Lloydminster's Primary and Secondary Retail Trade Areas and demographics including retail spending.

Section 5 - Nodal Profiles: Identifies and defines Lloydminster's eight retail nodes documenting critical market figures ranging from inventory, vacancy, employment, business counts and NAICS business classifications.

Section 6 - Stakeholder Interviews and Community Survey: Introduces and analyzes the engagement results from stakeholder interviews and the online Lloydminster community survey.

Section 7 - Demand & Gap Analysis: Estimates the current demand for retail measured against the market potential based on an extensive assessment of the current "supply" and Trade Area spending. Quantifies future retail demand over the next 10 years.

Section 8 - Business Targeting & Action Plan: Provides an outline of where forecasted demand could be most compatible, allocated by land use and node. Synthesizes gaps and opportunities for the retail and commercial market and identifies strategic actions that could be undertaken to strengthen existing businesses while cultivating new business and investment activity.

1.3 Approach

Taking a collaborative approach, the consultant team analyzed the business inventory and retail sales patterns in Lloydminster by quantifying voids and gaps, and determining sectors exhibiting "leakage" and "surplus". We used Geographic Information Systems (GIS) and business license data courtesy of the City of Lloydminster in addition to our own fieldwork data and interviews to generate a robust and up-to-date database of ground floor businesses. The team held one-on-one meetings in-person and virtually with developers and real estate professionals to understand perspectives on the retail and industrial market in Lloydminster along with an online community survey. Additional demographic and trade area data is from Statistics Canada and Manifold Data Mining (by Polaris Intelligence).

The process of inventory tabulation and reconciling takes into account the primary building use as the key metric for determining whether the uses are classified as retail, office/medical, auto, other, vacant, or non-retail. For example, a building in an industrial or business park that is designed for office uses would be classified as office. Similarly, in a retail environment there may be some uses that are office centric but overall business classification would be based on the predominant use in the area, which in this case would be retail.

Detailed explanations of methods are provided on a section-by-section basis throughout this report.

2.0 Regional and Local Context

2.1 Introduction

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

2.2 Regional and Local Context

Lloydminster grew around a highly active oil patch[1]. Its economy is based primarily on heavy oil production and agriculture, surrounded by some of Canada's most fertile land. On top of being a service hub for the oil and agricultural sectors, Lloydminster also serves the surrounding region as a key urban node offering diverse services, including recreation, shopping and events. The city has a library, a movie theatre, and a casino, along with two school divisions (public and Catholic), a college, and a French Immersion School[2]. Cenovus Energy is the largest employer and, since acquiring Husky Energy, is now the 3rd largest crude oil and natural gas company in Canada[3]. A strong retail and commercial sector can help stabilize the economy heavily affected by changes in the oil and food market.

Lloydminster is about half-way between Edmonton (250km west) and Saskatoon (275km east) and, as shown in **Figure 2-2**, boasts a unique geographic trait among cities in Canada: it is a city located in two provinces. The border running down the city centre became official in 1905 when the Fourth Meridian was chosen to separate Alberta and Saskatchewan[4]. Of the 31,582 city residents recorded in the 2021 census, 62.5% live on the Alberta side while 37.5% call the Saskatchewan side home (19,739 and 11,843 respectively)[5]. The County of Vermilion River encompasses the city's western boundary in Alberta and the Rural Municipalities of Britannia and Wilton surround the city to the east in Saskatchewan.

1. Lloydminster Northeast Area Structure Plan Market Study (NE ASP Market Study), 2019
2. Lloydminster Municipal Development Plan (MDP), 2013
3. Lloydminster Retail Mall Survey, 2022
4. Lloydminster Downtown Area Redevelopment Plan, 2020
5. Lloydminster, Census Profile, 2021 Census of Population, Statistics Canada

2.2.1 First Nations

Lloydminster is located within Treaty 6 territory which spans across present day Alberta and Saskatchewan (**Figure 2-1**). Seventeen First Nations are part of Treaty 6 which includes the Dene Suliné, Cree, Nakota Sioux and Saulteaux peoples[6] North of Lloydminster lie Big Island Lake Cree Nation, Cold Lake First Nations, Frog Lake First Nations, Kehewin Cree Nation, Makwa Sahgaiehcan First Nation, Ministikwan Lake Cree Nation and Onion Lake Cree Nation (fig). To the east are Little Pine First Nation, Moosomin First Nation, Poundmaker Cree First Nation, Saulteaux First Nation, Sweetgrass First Nation and Thunderchild First Nation. In addition to the strong First Nations presence in the area, the prairies also form a portion of the traditional Métis Homeland. Lloydminster is a part of Region II of the Métis Nation of Alberta and the Western Region 1A of the Métis Nation of Saskatchewan.

6. Stepping Stones: First Nations Treaties in Alberta Treaty 6, Alberta Teacher's Association, 2017

Figure 2-1. Approximate Treaty 6 Boundaries
(Source: The Alberta Teacher's Association - Education for Reconciliation, Stepping Stones - Treaty 6)
Note: This map shows the approximate area of treaty land as there is no consensus between rights-holders and stakeholders about exact treaty boundaries.

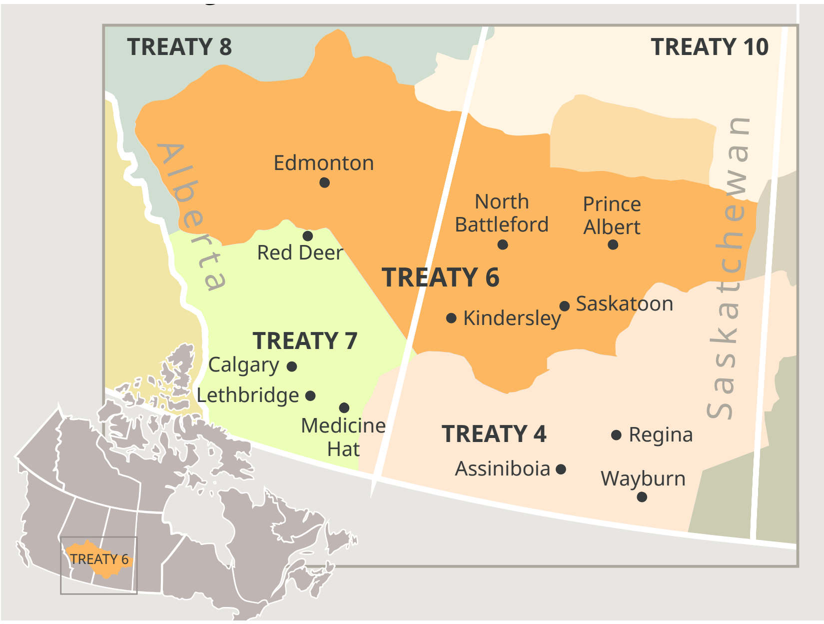
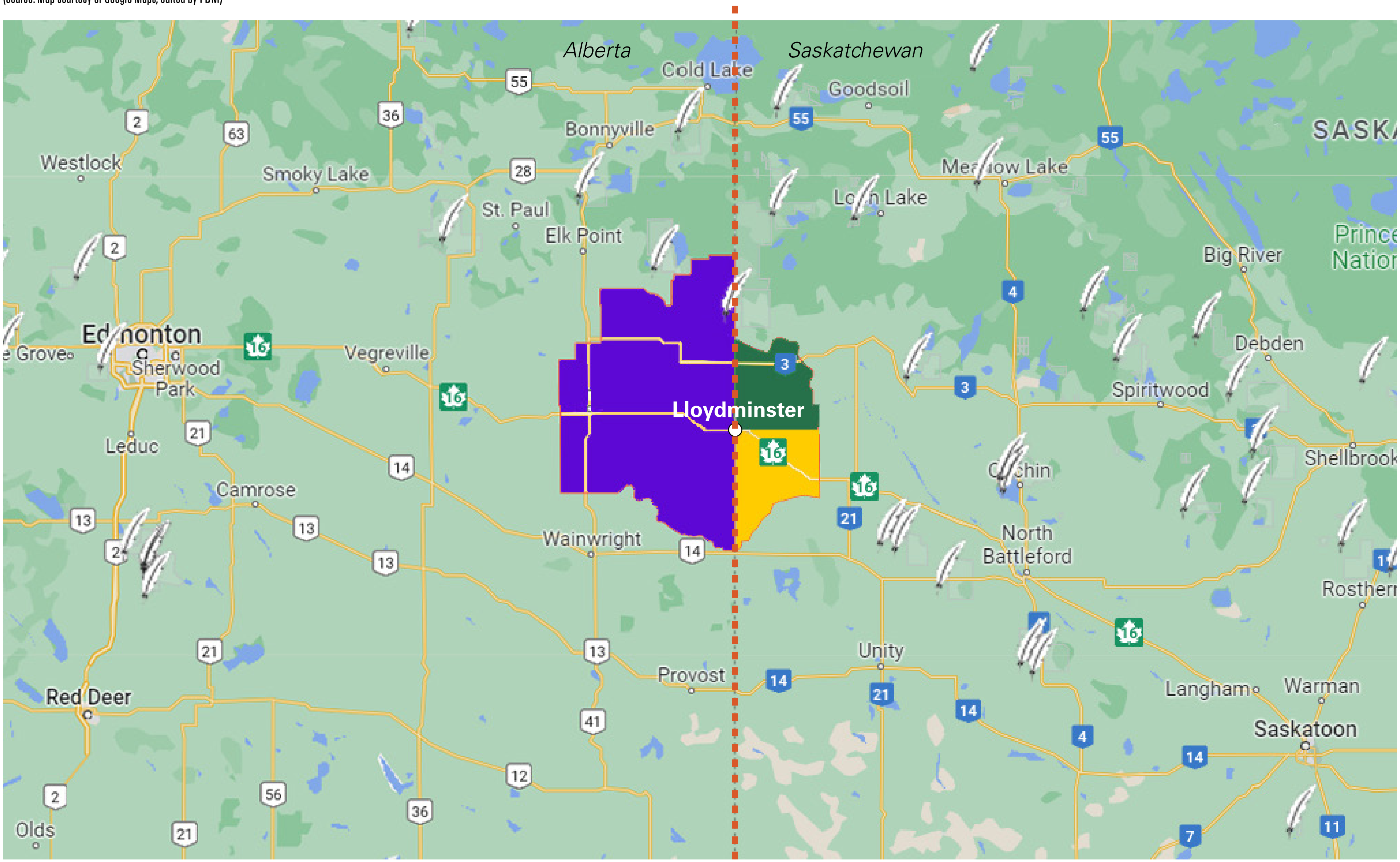


Figure 2-2. Context Map for Lloydminster
(Source: Map courtesy of Google Maps, edited by FBM)



County of Vermilion River, AB

Rural Municipality of Britannia, No. 502

Rural Municipality of Wilton, No. 472

First Nations Reserves

The City of Lloydminster is a signatory of the Heart of Treaty 6 Reconciliation initiative in partnership with the Métis Nation of Alberta, Onion Lake Cree Nation, Poundmaker Cree Nation, Frog Lake Cree Nation, Lloydminster Native Friendship Centre, Lloydminster Chamber of Commerce, Startup Lloydminster, and other community-based organizations. The group prioritizes education and awareness, and healing from the effects of colonization with the intent of strengthening relationships along the path of reconciliation.

From an economic development perspective, Indigenous People contribute significantly to Canada's economy, with the Indigenous economy contributing $6.74 billion in GDP to Alberta's economy in 2019[7]. Indigenous People represent the fastest growing population segment in Alberta, yet they have lower incomes than other Albertans and fewer than 1% of businesses in the province are Indigenous-owned. There exist opportunities to increase Indigenous entrepreneurship and engagement in the labour market, while also supporting the growth of Indigenous-owned businesses.

2.3 Growth and Development

As a border city, Lloydminster has proactively worked to coordinate with the three surrounding entities in Alberta and Saskatchewan when planning for growth and development. For instance, the County of Vermilion River and the City began working together to create policies and plans in 1982[8]. Intermunicipal planning includes plans to expand the city limits via annexation, for which this report will provide more detail in the upcoming review of plans and studies.

Current commercial and industrial development is centred around agriculture, oil, and gas, and located mainly along the intersecting Highway 16 (44th Street) and Highway 17 (50 Avenue)[9]. More businesses have tended to choose to locate on the Alberta side of the city because of more attractive business policies.

A major retail sector development is the new Canadian Tire that is currently under construction on the far west side of the city south of Highway 16. The new Lloydminster Place event arena, approved to be located east of 40 Avenue and south of 41 Street near the Gold Horse Casino[10], is expected to open toward the latter half of 2025. Having a new event centre on the Saskatchewan side of the city will attract more retail and business activity to that side, lending more balance to the city's commercial development.

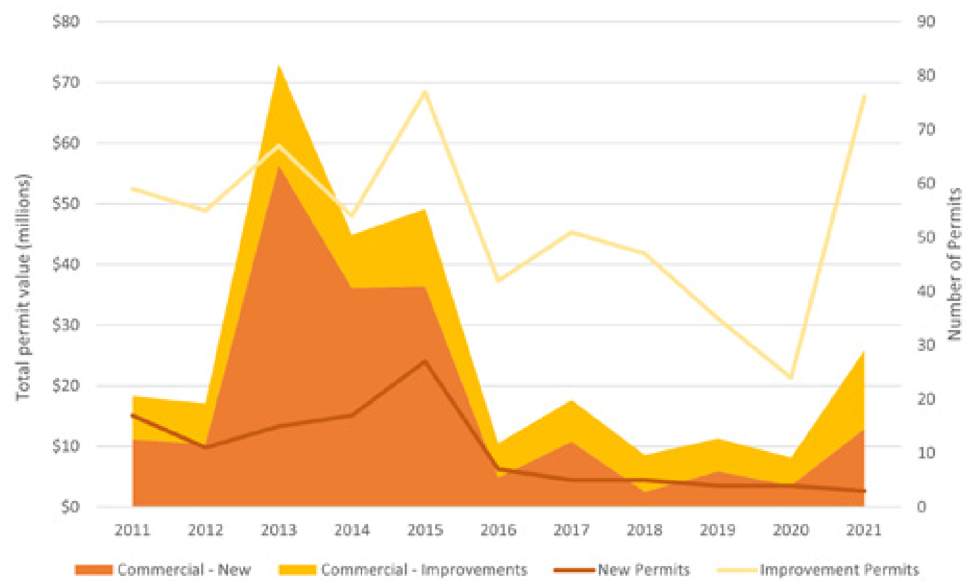
2.3.1 Building Permits

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

Of the $1.07 billion in total construction value seen in the City of Lloydminster in the last decade (2011-2021), commercial developments have accounted for $284.6 million (27%). Permits for new commercial developments tend to be fewer in number (115) but higher in value ($190 million), while commercial improvements represent the inverse with a high number of permits (472) and comparably lower total value ($93 million).

Following a significant permit spike in 2013-2015, commercial development leveled out between 2017-2021 with an average of 4 new commercial developments and 42 improvements per year. The number and value of commercial improvements declined in 2020, likely due to pandemic uncertainty and material shortages; however, 2021 saw a sharp rebound (**Figure 2-3**).

Figure 2-3. City of Lloydminster Commercial Building Permits (1998-2021)
(Source: City of Lloydminster, prepared by FBM)



7. Opening the Door to Opportunity: Reporting on the Economic Contribution of Indigenous Peoples in Alberta, ATB & MNP, 2021
8. Lloydminster/Vermilion County Intermunicipal Development Plan, 2008
9. Lloydminster Planning District Official Community Plan, 2014
10. Council approves site selection for new event arena. January 6, 2022. City of Lloydminster

2.4 Relevant Plans and Studies

Growing the economy and attracting businesses is a clear priority reflected throughout the City's plans. The following section presents a review of plans and studies which are relevant to the growth and development of Lloydminster's retail and commercial offerings.

2.4.1 Intermunicipal Planning

With the provincial border running through its centre, the City is governed by a specialized piece of provincial legislation called the Lloydminster Charter which is approved by both provinces[1]. Planning matters are governed by the Alberta Municipal Government Act, despite the town's location in both provinces, with the exception of subdividing and replotting lands in Saskatchewan[2].

Lloydminster has coordinated with its neighboring county and rural municipalities (RM) using two key plans. Both plans focus on coordinating regional transportation, servicing, and stormwater/wetland management, but also emphasize the importance of growing the regional economy.

The **Intermunicipal Development Plan (IDP) for Lloydminster and Vermilion River County (2008)** offers a vision for the city's Alberta side and the entirety of Vermilion River County over two time frames: 30 years for closer to the City and 60 years for farther out. The IDP's purpose "is to establish a regional framework for attracting economic opportunities and managing land use, [...] improve opportunities to secure a long-term economic base, [... and] to be "development ready" and future-oriented in their planning efforts and thus acquire an edge over other municipalities in attracting additional economic activity"[3].

As shown in **Figure 2-4**, Urban Expansion areas (UE on map) are designated for future annexation by the city. The IDP specifies that Area Structure Plans (ASPs) will be prepared for the three types of UE areas. North UE Area allows continued expansion of industrial/secondary commercial uses (secondary commercial is understood as commercial uses in areas that are not retail-focused). Central UE Area is intended mainly for residential growth but will allow retail commercial, secondary commercial, and minor industrial opportunities. Other designations relevant to future retail are the Rural Commercial/Industrial zone (RCI), which allows commercial/industrial uses along Range Road 14, and the Highway Profile Development Area (HPD), which allows business and industrial uses along Highway 16, over the long-term for the both zones.

The **Lloydminster Planning District Official Community Plan (OCP) (2014)** guides physical, social, and economic development for the Saskatchewan side of the city along with portions of the RM of Wilton No. 472 and RM of Britannia No. 502 over a 20-year time-frame. It is based on a 2013 Growth Study[4] which projected that the City's population would grow to 51,307 people by 2041; such growth would require the city to expand its boundaries into what are currently rural neighboring lands.

Two key goals for commercial growth from the OCP were:

- "To strengthen the economic base of the member municipalities by creating a positive environment for growth and sustainable business development" and
- "To identify lands which are suitable for future urban and rural industrial, commercial, residential and other land use categories"[5].

It also identifies the opportunity to grow the tourism industry by showcasing natural amenities like Neale Lake (**Figure 2-5**).

Multiple future land uses shown in **Figure 2-5** enable different forms of commercial development. A commercial objective specific to the Agricultural Policy Area is to diversify agriculture-related enterprise, such as agricultural innovation and agriculture-related value-added activity. The Highway Corridor Policy Area is intended for service commercial and industrial uses that require large amounts of land but minimal services as well as highway commercial development to meet traveler needs. Rural Commercial Policy (RCP) area allows "a selective range of commercial and light industrial development in designated areas adjacent to the City based on the availability of services"[6]. The RCP will only allow residential uses that are accessory to commercial or industrial uses. In the future Residential Policy Area, applications for zoning amendments to allows highway commercial development or subdivision will be considered on a case-by-case basis.

1. Draft Annexation Transition Plan, City of Lloydminster, 2022
2. Lloydminster Municipal Development Plan (MDP), 2013
3. Pages 3-4, Lloydminster MDP, 2013
4. City of Lloydminster Final Report: Growth Study, 2013
5. Page 4, Intermunicipal Development Plan for Lloydminster and Vermilion River County, 2008
6. Page 30, Official Community Plan, 2014

Figure 2-4. Future Land Use Map from Vermilion River/Lloydminster IDP
(Source: Lloydminster/Vermilion County Intermunicipal Development Plan, 2008)

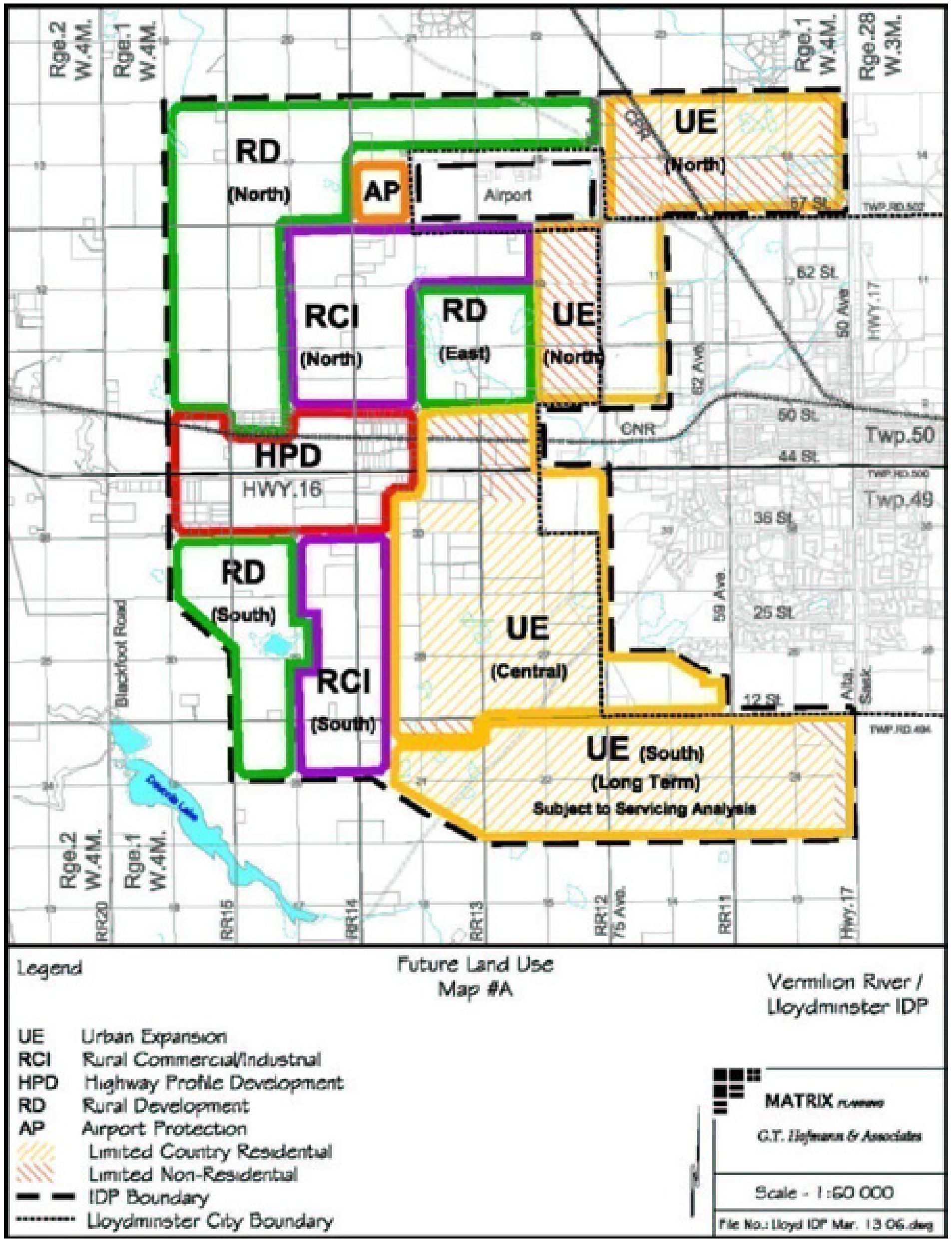
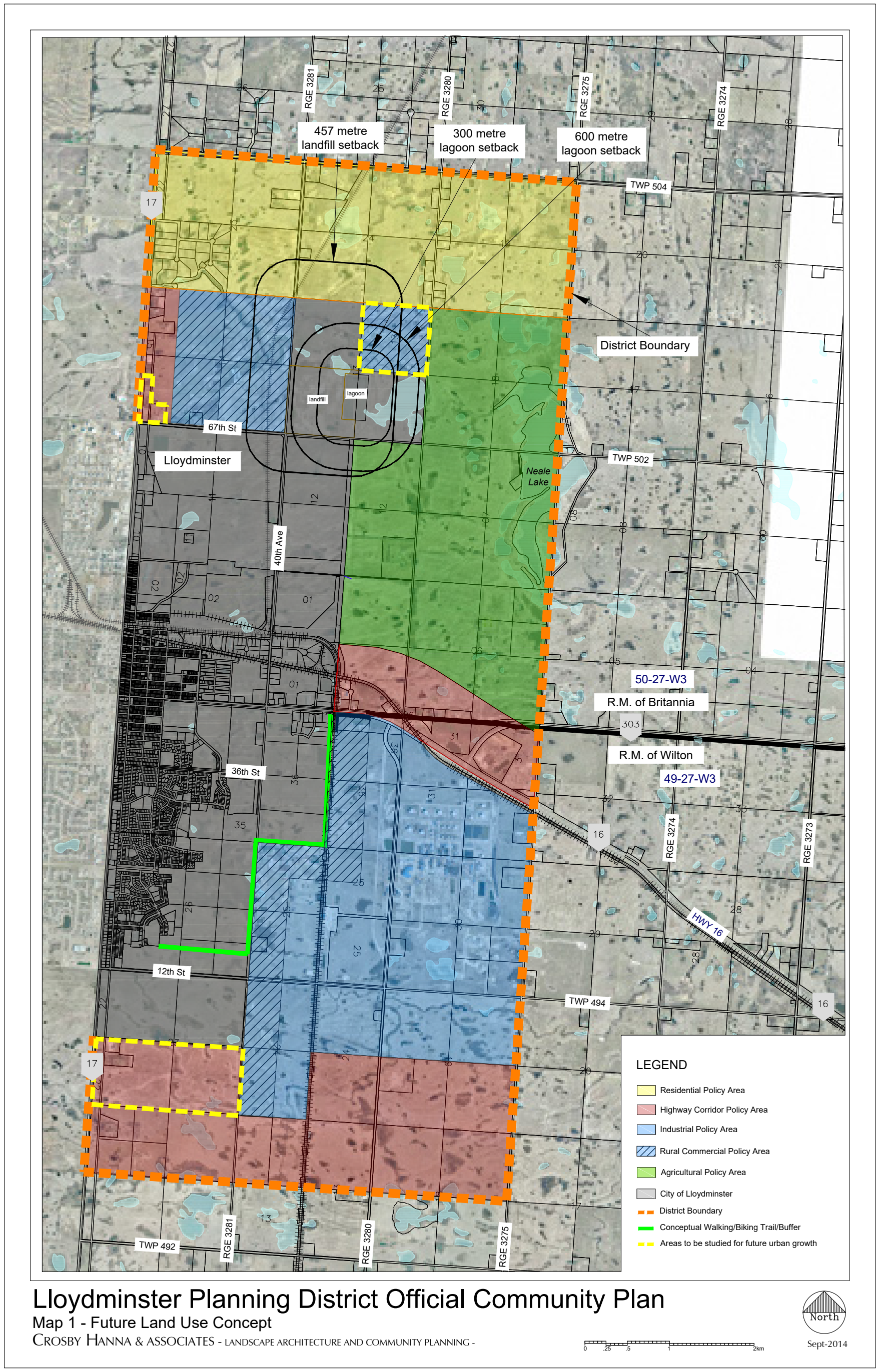


Figure 2-5. Future Land Use Map from OCP for Lloydminster & RMs
(Source: Lloydminster Planning District Official Community Plan, 2014)



2.4.2 Annexation

The City of Lloydminster undertook an official annexation process to accommodate projected future growth with a particular motivation to create more space for future commercial and industrial development. Annexation is a complex process with many moving parts. Public consultation, intermunicipal negotiation and cooperation, several rounds of applications to the province, a 2013 Comprehensive Growth Strategy, and a 2019 Joint Regional Growth Study for City of Lloydminster and Count of Vermilion River have all contributed to the process. As of April 1st, 2022, the City has officially annexed certain portions of the County of Vermilion River in Alberta via the Annexation Bylaw, creating official new city limits as shown in **Figure 2-6**. Those looking to develop on newly annexed land will now follow the regulations for the "Urban Transition (UT) District" in the city's Land Use Bylaw[1]. The UT District is intended to enable relatively undeveloped agricultural and rural land uses as the area awaits future urban development; some such uses are as-of-right, others discretionary, and examples include farming, public parks, solar collectors, campgrounds, drive-in theatres, and industrial storage[2].

The **2013 Comprehensive Growth Strategy**[3] significantly informed the City's decision to pursue annexation*. The strategy took into account the 30-year land supply needs for Lloydminster. Of the high, medium, and low population scenarios shown in **Figure 2-7**, the Strategy recommended the high scenario for land planning. The Strategy estimated that if the city took no action to acquire new lands, available commercial land would be depleted by 2015 and industrial land by 2018. The City identified a desire to maintain split of 65% residential and 35% non-residential (commercial and industrial), so as not to increase tax burden on residents.

The Strategy's vision for all of the proposed annexation areas (except for those around the airport and landfill) enable commercial development, as summarized below:

- South Annexation Area: residential with neighbourhood commercial and highway-oriented, large format commercial
- West Annexation Area: highway-oriented, large format commercial, plus industrial uses
- Northwest Annexation Area: industrial development, non-residential
- North Annexation Area: residential with neighbourhood commercial and highway-oriented, service commercial, along with industrial.

**The city is currently conducting a Comprehensive Growth Strategy Update that will replace the 2013 Strategy and serve in plans and negotiations for future annexation to meet 50-year growth needs[4].*

Figure 2-6. New City Limits from 2022 Annexation
(Source: Annexation Bylaw No. 01-2022, City of Lloydminster)

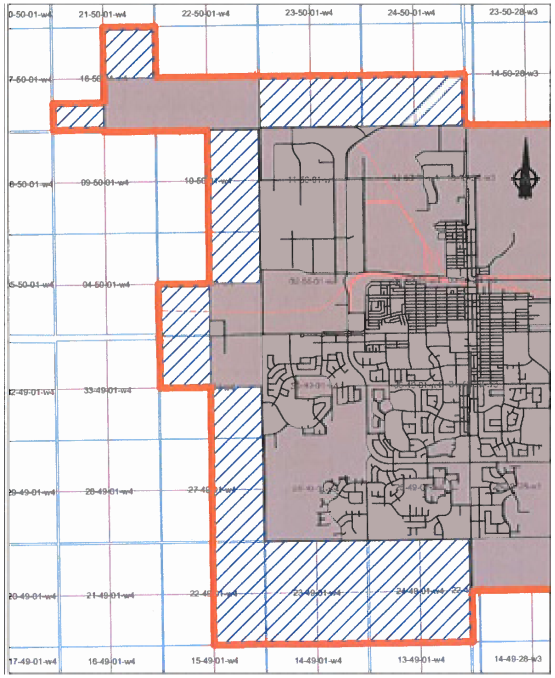
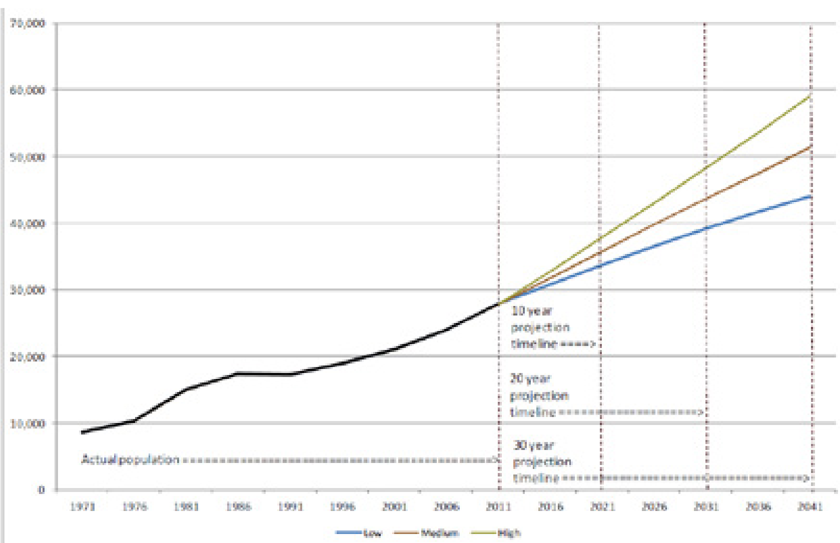


Figure 2-7. Population Projections 2011 to 2041 from 2013 Growth Strategy
(Source: City of Lloydminster Final Report: Growth Study, 2013)



1. Draft Annexation Transition Plan, City of Lloydminster, 2022
2. Bylaw No. 5-2016, City of Lloydminster
3. City of Lloydminster Final Report: Growth Study, 2013

4. Lloydminster.ca, Annexation, Accessed September 21, 2022

2.4.3 Municipal Development Plan

The **Municipal Development Plan (MDP)** (2013) is a statutory document guiding the City's (on both sides of the border) growth over a 20-year time frame, based on a projected population of 50,000 people by 2032. Many of the plan's directives have now taken shape. For instance, the MDP directed continuing the annexation process which is now complete. It called for continued intermunicipal cooperation through updates to the intermunicipal planning documents for both sides of the border, one of which has been completed (i.e., the OCP for Saskatchewan side).

The MDP strongly supports commercial and retail growth. The following high level plan components that inform the City's overall planning approach suggest a welcoming environment for retail:

- **2032 Vision:** To be "an economic hub that drives and promotes regional development through new opportunities, innovation and entrepreneurship; that provides a range of community services and recreational opportunities that enhance the quality of life available to all residents; [… and] committed to sustainable growth principles, managing land consumption in a manner that prioritizes and promotes redevelopment to existing areas"[1].
- **Best Practices:** Best practices selected for the MDP are sustainability, smart growth, intensification/redevelopment, and urban villages, all of which encourage smaller scale retail growth.
- **Community Engagement:** The public expressed an interest in seeing the City strengthen local business, develop more commercial sites on the Saskatchewan side of the city, maintain business-friendly policies to encourage local businesses, and develop/expand downtown.
- **Strategic Priorities:** The fifth strategic priority for the city is Marketing strategy/branding: to promote the city as Canada's entrepreneurial capital.

Still at a city-wide level, sector-specific goals, objectives, and policies further enable commercial and retail development as summarized in **Table 2-1**.

The MDP's Commercial Development Goal is to provide well-located and compatible development opportunities to serve both the local and regional markets. The plan states commercial and residential growth should be balanced to not over-burden the tax base and shares a vision for four commercial areas of focus as follows:

1. Page 26, Lloydminster MDP, 2013

Table 2-1. Sector-Specific Directives related to Commercial Growth from MDP

(Source: Based on Lloydminster Municipal Development Plan, 2013; created by FBM)

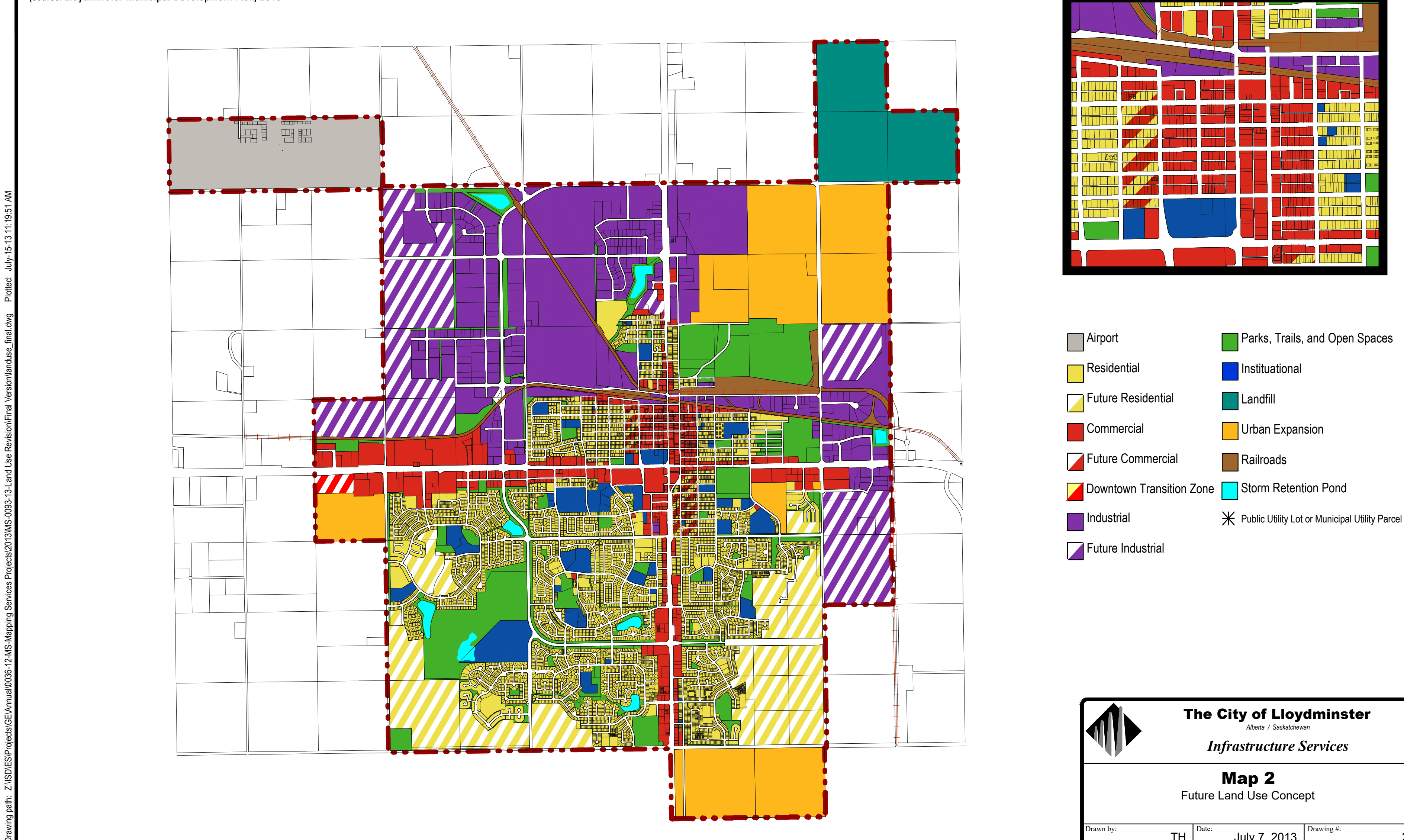
Economic	• Develop an Economic Development Strategy • Diversify the economy by making strategic land available and providing utility infrastructure for new businesses • Encourage regional partnerships for economic growth, promote agri-business (especially grain-related), and continue to lead the country with heavy oil industry excellence. • Invest in education and training for local skilled labour force
Tourism	• Take advantage of location and become more of a tourism destination, promoting City as a regional convention and meeting centre. • Develop and implement a Tourism Strategy* • Market and image-build the area for business development and tourism • Promote city as venue for special events and a regional meeting centre
Residential	• Create "complete" neighborhoods that provide access to services and amenities through ASPs and ARPs. • Add convenience retail, recreation facilities, and health services in Mixed-Use Neighbourhoods

- **Downtown Core:** Mixed-use pedestrian-oriented heart of the city
- **Vehicle-Oriented Commercial (VOD):** Accommodates large numbers of vehicles in a high quality, sustainable environment, prioritizing revitalizing existing VOD areas.
- **Urban Villages:** Smaller commercial nodes located in newly designated and centrally-located community cores that will be higher density and promote mixed-use development, with office or residential above and commercial on ground floor. Nodes to be developed are entertainment- and hospital/healthcare-focused.
- **Neighbourhood Commercial:** Brings smaller scale convenience commercial closer to where people live, located on arterial and collector streets but away from designated major commercial districts, schools, and parks.

**Developing a Tourism Strategy is mentioned in the MDP, OCP (2008), and April 2019 update to Council's 2017-2021 Strategic Plan. The neighbouring Vermilion River County did a Tourism Opportunity Assessment in 2020, to which Lloydminster was a contributing partner, but such a study or plan has yet to be completed for Lloydminster.*

As shown in **Figure 2-8**, commercial development will continue to be concentrated along the two central intersecting highways, with some expansion into nearby neighbourhoods. The Commercial zone should maintain existing vehicle-oriented big box stores while adding human/ neighborhood-scale retail in the downtown core for more of an urban village feel. The Downtown Transition zone allows mixed use retail and higher density residential to facilitate growth in the downtown core and act as a buffer between lower density residential. The Urban Expansion zone may also accommodate future commercial or retail growth, depending on directions set out in current or future ASPs.

Figure 2-8. Future Land Use Concept from Lloydminster MDP 2013
(Source: Lloydminster Municipal Development Plan, 2013

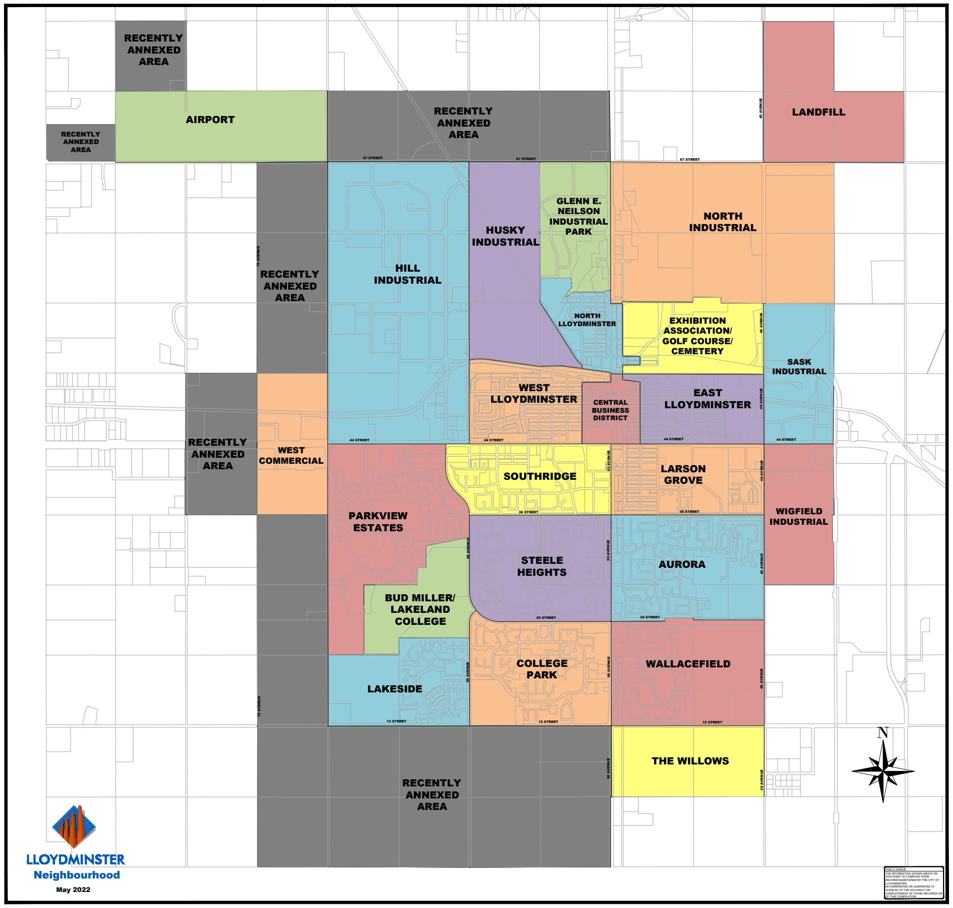


2.4.4 Area Structure Plans (ASP)

Most of Lloydminster's Area Structure Plans (ASPs) have opportunities for future retail and commercial growth. They generally encourage retail businesses to locate along major vehicle routes while some place extra emphasis on integrating neighbourhood-scale businesses into neighborhoods using the **urban village** concept. Urban villages integrate a mix of different but compatible uses in a higher density core, which then transitions outward to medium density residential, then further out to lower density residential.

Here we review points of interest for ASPs approved (or undergoing amendment processes) as of August 2022. **Figure 2-9** shows their locations.

Figure 2-9. Lloydminster Neighbourhood Map, updated May 2022
(Source: City of Lloydminster website)



- **Hill Industrial ASP (2014):** Maintains existing commercial/industrial uses and provides future industrial land supply along with a future vehicle-oriented commercial development designation (**Figure 2-10**).
- **Parkview Estates ASP (2014):** Seeks to be where people live, learn, work, shop, and play with services and amenities to meet day to day needs of residents. Looking to maintain existing commercial land use areas rather than add new while expanding low and medium density residential uses (**Figure 2-11**).
- **Colonial Park (Aurora) ASP (2014):** Keeps existing commercial with some medium density commercial opportunities off major collectors and among multi-family developments. Focused on expanding greenway and residential (**Figure 2-12**).
- **Lakeside ASP (2019):** Aims to be a complete, inclusive urban village offering services and employment to residents, a shopping centre, well-integrated parks, all modes of transport, and a variety of housing type and densities. The Shopping Centre is intended to be a regional destination offering large format retail (**Figure 2-13**).
- **Lamont (The Willows) ASP (2016):** Aims to be an integrated residential community that allows people to live, learn, play, work, and shop. Includes varied housing forms, neighbourhood commercial along select roads, small business within neighbourhoods, and new major commercial corridors along major streets to draw customers from all over the city (**Figure 2-14**).
- **Northeast ASP (2020)**: Currently under review to make future uses more compatible with existing nearby uses. Proposal would remove all residential and neighborhood-commercial zoning, making most of the site industrial with a small amount of recreation to the southwest and commercial/industrial along the west (**Figure 2-15**).
- **Wigfield Industrial ASP (2014):** Currently under review. The draft proposed concept (**Figure 2-16**) was introduced to council Aug. 15, 2022 and would include commercial opportunities along the proposed 36 Street extension and "Event Facility Commercial" near the proposed location of the new Lloydminster Place Event Arena.

Land use (LU) concept maps from the City of Lloydminster for each ASP are shown on the following page, as each contains some area(s) of interest for future retail. Commercial zoning is depicted in **red** in all maps except the Lamont ASP, with some more special neighborhood- or event-related-commercial zoning in certain ASPs.

Figure 2-10. Hill Industrial ASP LU Concept
(Source: City of Lloydminster website)

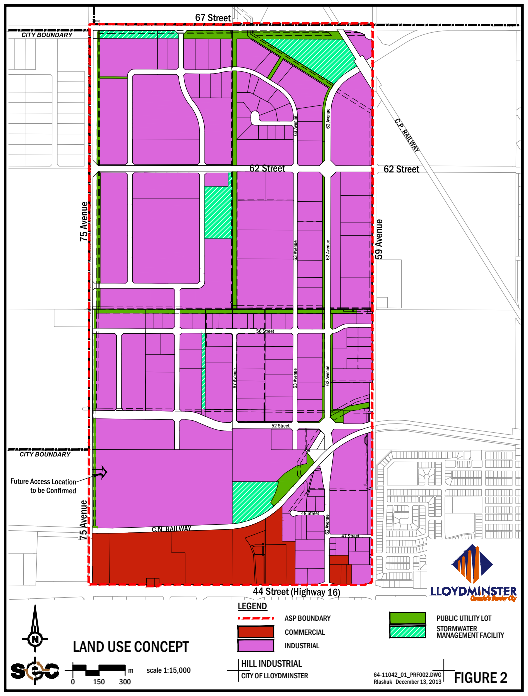


Figure 2-11. Parkview Estates ASP LU Concept
(Source: City of Lloydminster website)

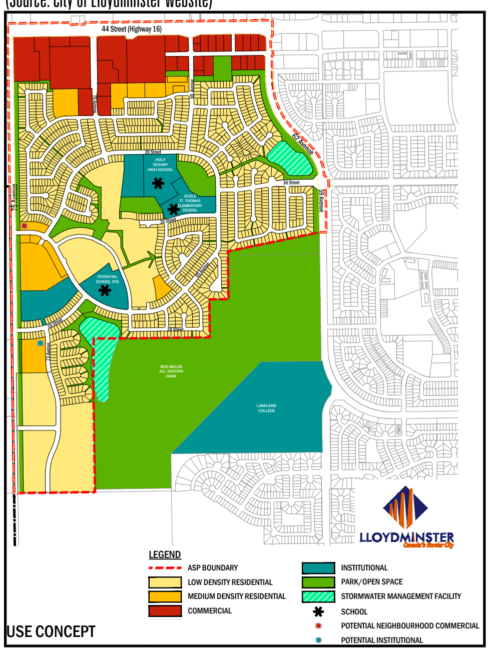


Figure 2-12. Colonial Park (Aurora) ASP LU Concept
(Source: City of Lloydminster website)

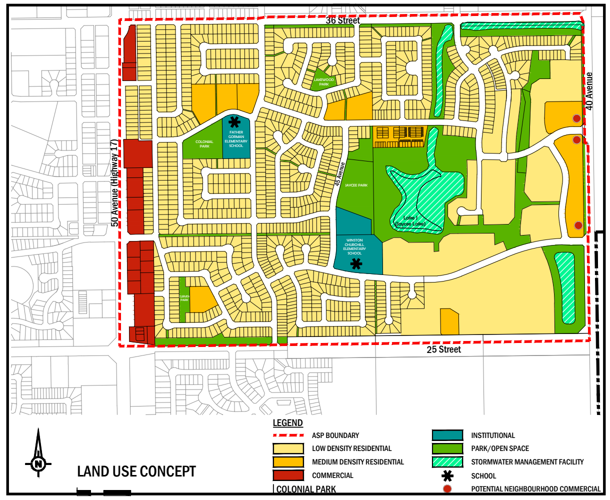


Figure 2-13. Lakeside ASP LU Concept
(Source: City of Lloydminster website)

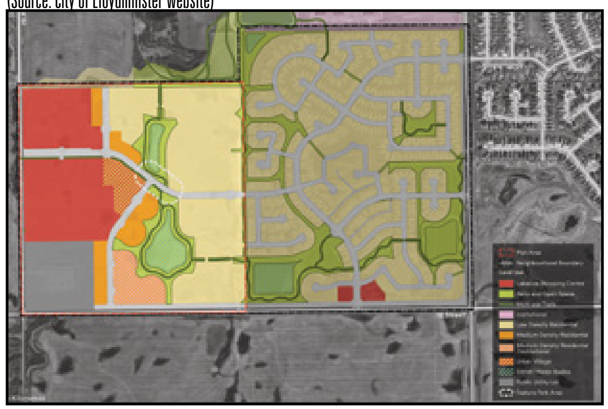


Figure 2-14. Lamont (the Willows) ASP LU Concept
(Source: City of Lloydminster website)

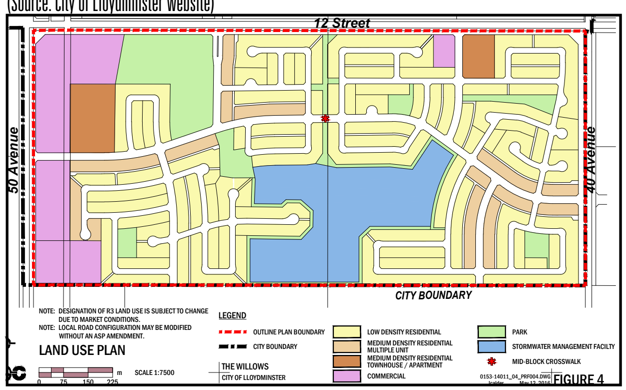


Figure 2-15. **PROPOSED** Northeast ASP
(Source: City of Lloydminster website)

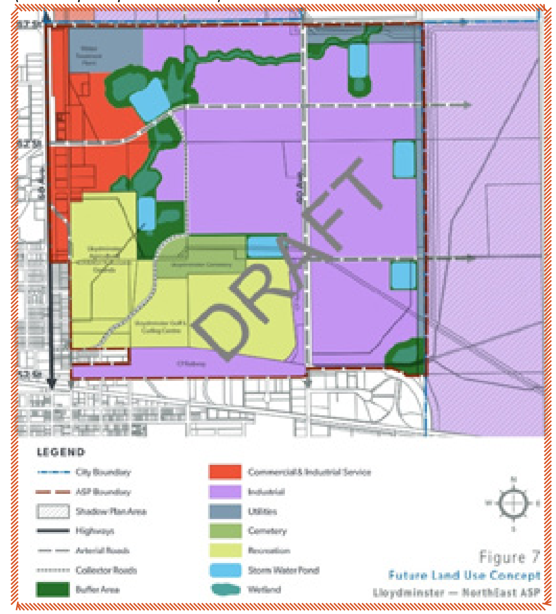
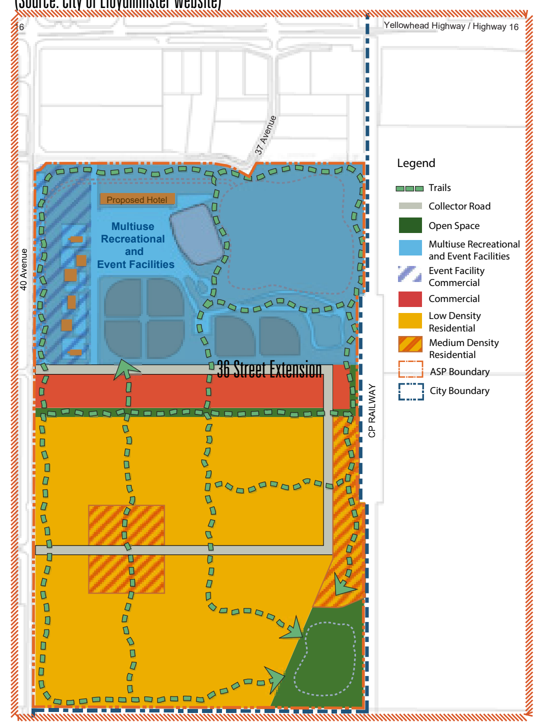


Figure 2-16. **PROPOSED** Wigfield ASP
(Source: City of Lloydminster website)

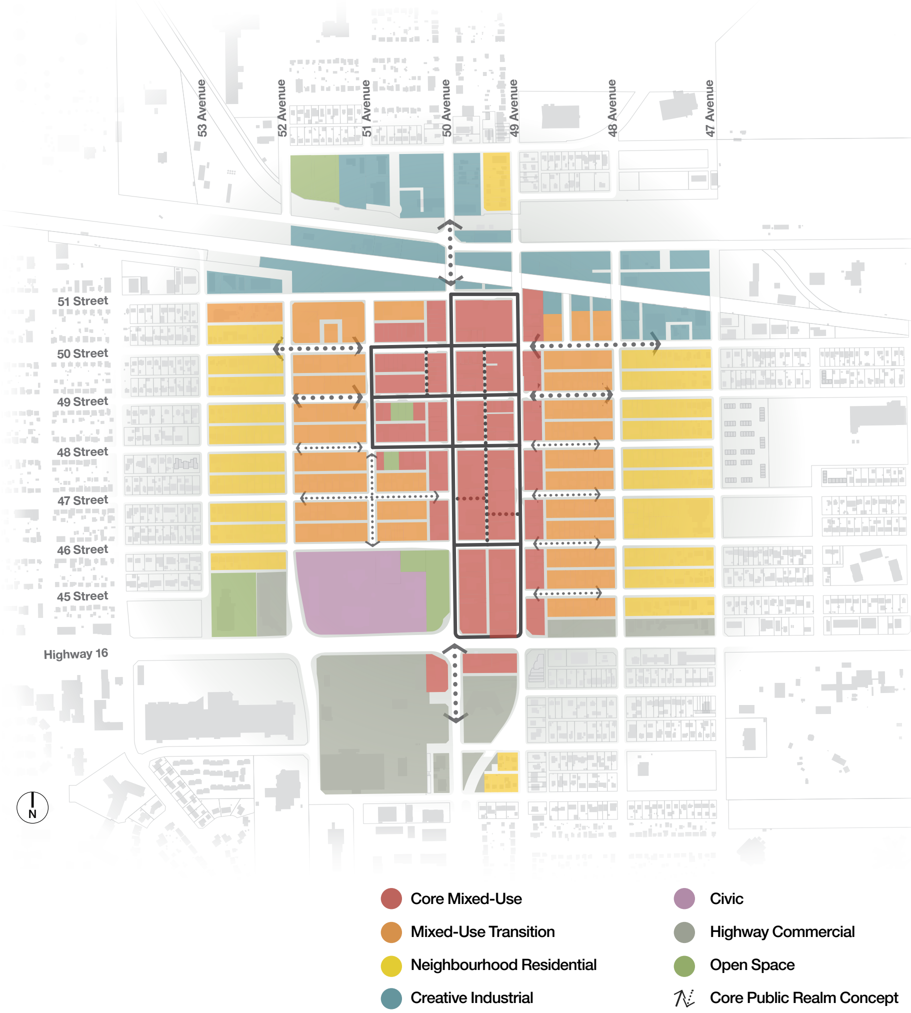


2.4.5 Downtown Area Redevelopment Plan

The **Downtown Area Redevelopment Plan (DARP) (2020)** is a 15-year revitalization strategy with a **vision** meant to change the current uses in and perceptions of Downtown: "a safe, welcoming, vibrant, and walkable community that serves as a home, workplace, and destination where people gather for unique cultural, living, shopping, and entertainment experiences in the bi-provincial city"[1].

1. Page 12, Downtown Area Redevelopment Plan, 2020

Figure 2-17. Land Use Concept from the Downtown ARP 2020
(Source: Lloydminster Downtown Area Redevelopment Plan, 2020)



The DARP identifies several **key challenges** facing Downtown:

- **Land use and market conditions:** High business turnover and vacancies; general negative perceptions (unsafe, poorly-maintained); imbalance of too many services and not enough retail/restaurants; inactive streets; lack of family-oriented housing
- **Public realm and open space:** Unattractive and under-utilized public space; deteriorating sidewalks; lack of night lighting; minimal private investment
- **Transportation and parking:** The new design for the *North-South Corridor* undermines the iconic border markers as entrance features to Downtown; residents are reluctant to park and walk any distance due to negative perceptions about the area.

The plan also identifies **strengths and opportunities** in the area:

- Many available, affordable storefronts located close together could be used by the City's "entrepreneurs, artists, and innovators... to become a lively cultural, arts, and business incubation Area"[2].
- Open lots could be converted permanently into public space or temporarily for events to make Downtown the centre for public life.
- Existing compact, pedestrian-scale, and walkable urban form
- Growing residential demand
- Already houses the City's only movie theatre and public library
- Farmer's Market has had early success as a business incubator

The future land use concept (see **Figure 2-17**) shows the plan involves a high-density, commercially-focused core that gradually transitions outward into medium- and then lower-densities with more residential uses. The Creative Industrial Area to the north is an interesting designation for businesses as it only allows light industrial, service commercial, and live-work uses that have a low impact on adjacent uses (such as workshops, microbreweries, gyms, or studios). The Downtown Highway Commercial area to the south encourages low profile highway-oriented development like auto-oriented commercial and hotels/motels.

Overall, the plans suggests that the Downtown offers significant opportunities for future retail and commercial growth, especially if community concerns are addressed.

2. Page 6, Downtown Area Redevelopment Plan, 2020

2.4.5 Business and Retail Studies

The goal of the **Lloydminster Northeast ASP Market Study (2019)** was to determine demand for residential, retail, office, industrial, and institutional land in Lloydminster to inform the Northeast ASP, although its analysis includes the whole City. The study says the City serves **a trade area of over 130,000 persons** (extending from Kitscoty, AB to Lashburn, SK), allowing the development of a healthy retail centre that offers big box stores, smaller boutiques, and restaurants unseen elsewhere in the surrounding hamlets and villages. The City's population is fairly stable, with the majority of residents calling Lloydminster home for five or more years and 45% having lived there for 10 or more years.

Drastic oil market fluctuations were found to have minimal affects on the retail market while the real estate market was more affected, with real estate on the Alberta side decreasing more than the Saskatchewan side (8% versus 2.4% decrease respectively). Based on 2046 population and business growth projections, the study noted the following implications for land use planning related to retail:

- **Retail**: Study did not recommend retail in the NE area because retail is dependent on road exposure. Retail in the area is mainly only possible because of projected future residential development*.
- **Residential**: Projects 15,000 added households (total population of 67,000) requiring an added 327 acres of residential development.

**Since the new proposed NE ASP (2022) revision removes residential from future land uses, the implications of this particular finding is that associated future retail is now less suited to the NE area.*

In the **What We Heard Report: 2020 Business Climate Survey Report (2021)**, the City collected feedback from businesses representing a wide range of industries and business sizes, most of which had been in business more than 10 years (59%). Responses were collected between October 13-28, 2020. Respondents were generally positive about doing business in Lloydminster, citing its unique location on the border of two provinces, business-friendly regulations, supportive local residents, and good availability of housing, property, and labour as strengths. Perceived challenges were the economy's dependent on oil and gas industry fluctuations and the COVID-19 pandemic. In 2020, 74% of businesses saw a drop in revenue. Workers bore the brunt of pandemic impacts, with 48% of respondents reporting laying off staff and 23% reporting reducing staff hours. About 18% closed temporarily and 16% changed their products to meet new demand.

The **Lloydminster Retail Mall Vacancy Survey: January 2022 (2022)** found the retail outlook to be positive, lending stability and diversity to the otherwise oil- and agriculture-driven economy. Most strip retail is located along the two major intersecting highways - Highway 16 and Highway 17. The study says the City serves **a trade area of over 100,000 people** (excluding Edmonton and Saskatoon's trade markets). More real estate sales took place on the Alberta side (72%) than Saskatchewan (28%). The average house price was $312,669 for Alberta side and $248,899 for Saskatchewan (2021), which represents a slight dip for Alberta since 2020 and a 5.9% increase for Saskatchewan.

Figure 2-18 is the Retail Mall Survey summary table showing vacancy rates for the past year. A significant majority of retail space is located on Alberta side (92.2%). Vacancy rates were very stable in Alberta between 2020 and 2021 with just a slight increase of 3.42% to 3.86%, while vacancy rates saw a considerable drop in Saskatchewan, from 11.94% to 4.58%. The rates point to a potentially growing retail on Saskatchewan side.

A general pattern in the economic indicators suggests that the economy on Alberta side of the city is fairly stable, if perhaps lagging slightly (i.e., slight increases in vacancies and decrease in housing prices), while the Saskatchewan side is seeing more growth indicators (i.e., falling vacancy rates and rising housing prices), with a net overall trend of continued growth for the City as a whole.

Figure 2-18. Summary of Retail Mall Vacancy Survey Findings
(Source: Lloydminster Retail Mall Vacancy Survey, 2022)

Table #3
RETAIL MALL SURVEY
EXECUTIVE SUMMARY - Effective December 31, 2021, Conducted January 10, 2022

Type	Total Area (Sq.Ft.)	Anchor (Sq.Ft.)	CRU's (Sq.Ft.)	Total Vacant (Sq.Ft.)	Vac. 2021	Vac. 2020	Vac. 2019	Vac. 2018	Vac. 2017
Enclosed	199,163	68,897	130,266	25,116	12.61%	7.79%	15.08%	23.84%	24.13%
Strip	1,823,257	613,187	1,210,070	52,948	2.90%	3.03%	3.11%	3.03%	2.02%
Total Alberta	2,022,420	682,084	1,340,366	78,064	3.86%	3.42%	4.10%	4.98%	4.12%
Total Sask.	170,656	0	170,656	7,815	4.58%	11.94%	7.50%	12.32%	8.40%
Total City	2,193,076	682,084	1,510,992	85,879	3.92%	3.99%	4.32%	5.52%	4.44%

2.5 Transportation

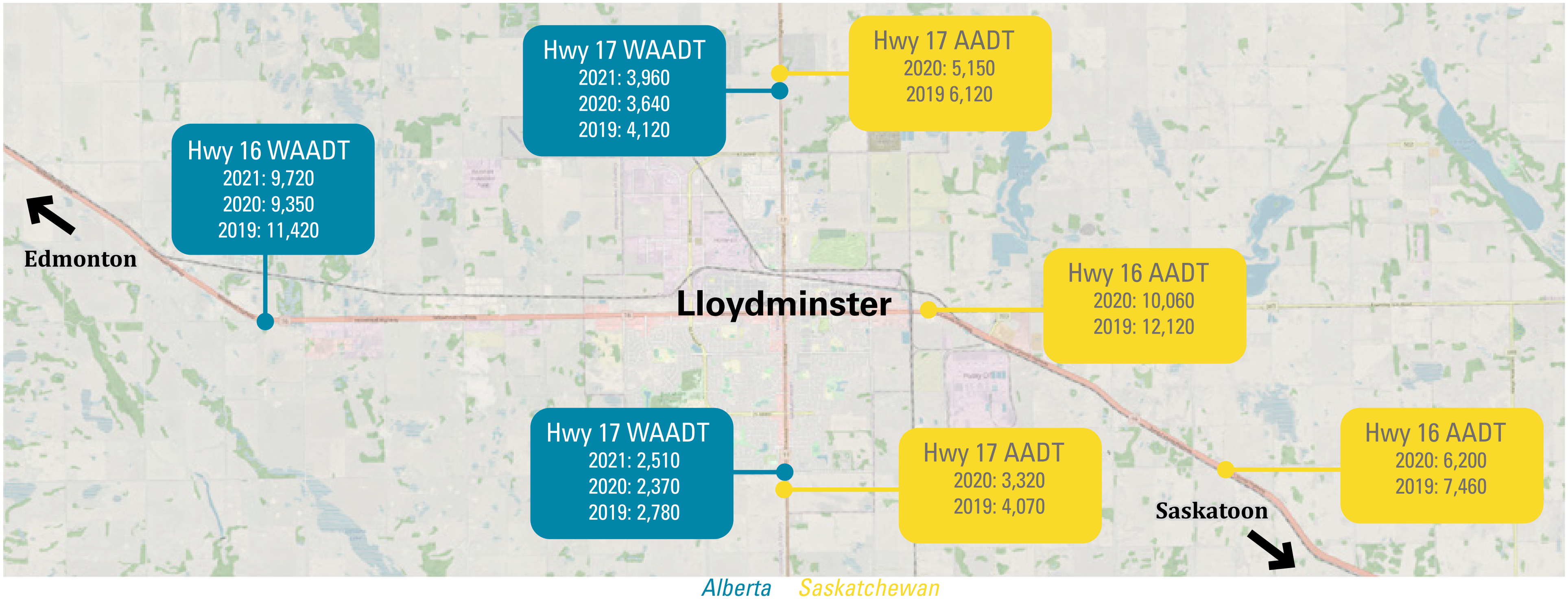
Transportation attributes are an essential foundation to meeting demand in the retail sector. An understanding of these attributes can help create the necessary conditions for attracting and retaining businesses and residents to locate in a community.

Highway 16 and 17 are key transportation routes for the City of Lloydminster with Yellowhead Highway 16 connecting the City with Edmonton and Saskatoon. **Figure 2-19** presents traffic counts on both highways as provided by the provinces of Alberta and Saskatchewan. In Saskatchewan, the Annual Average Daily Traffic (AADT) volume for 2020 is noticeably lower than the 2019 figures which reflects the decreased traffic volumes due to COVID-19 pandemic lockdowns. At the time of writing, 2021 data was not yet available in Saskatchewan; however, traffic volume is expected to rebound similar to the trend in Alberta over 2019-2021. Alberta's traffic information differs from Saskatchewan's in that it is provided as Weighted Average Annual Daily Traffic (WAADT) volume which is a synthesis of several point AADT volumes into a single volume number for each portion of road with similar characteristics (i.e. per Traffic Control Section). Despite these differences, Highway 16 consistently has the highest traffic volumes with traffic slightly higher to the West. Looking at the shared border between Alberta and Saskatchewan, the northern portion of Highway 17 sees higher traffic volumes than the southern portion which suggests visitors to the City often come from the north.

Within the City, the Lloydminster Municipal Airport hosts regular Westjet flights to Calgary, while KCTI Travels provides regional passenger bus services between Edmonton, AB and Prince Albert, SK with service to Lloydminster, North Battleford, and Vermilion. Border City Connections also provides people who have special needs and/or mobility challenges with door-to-door transportation within and beyond the City. Lloydminster currently has no public transportation system despite repeated calls from local organizations (such as the Lloydminster Chamber of Commerce[1]) to invest in a small scale pilot projects intended to support students, senior citizens, low-income individuals, and immigrants in safely accessing goods and services across the City.

1. Public Infrastructure to Support Community Growth (Public Transportation), Lloydminster Chamber of Commerce, 2019

Figure 2-19. Lloydminster Traffic Count Map
(Source: FBM with data from Alberta Transportation Traffic Control Map and Government of Saskatchewan 2020 and 2019 Traffic Volume Maps)



3.0 Trends

3.1 Introduction

This section presents trends of interest to the Lloydminster retail market, including COVID-19, the oil and gas industry, storefront improvement programs, border city dynamics, and shifting patterns in retail technology and store footprint sizes.

3.2 COVID-19 and Business Statistics

Over the past two years, the novel Coronavirus (COVID-19) has changed the way many Canadians work, shop, travel and trade. The pandemic has taught businesses the hard way how to be more efficient. More people are working from home, shopping online, and vacationing and traveling locally, while companies invest in technology and encourage consumers to buy local goods[1]. Lockdowns and travel restrictions meant Canadians were spending less time in brick and mortar establishments and many were opting to travel on foot, on wheels, or via a personal vehicle instead of using public transit. Nationwide, retail sales dropped in 2020 then rebounded in 2021 as vaccines became available, restrictions began to ease, and consumer confidence increased. Trends include strong spending in home-related categories; job growth in professional services, government and technology; and continued pressure on the hospitality and food/beverage sectors[2]. This created an encouraging environment for retail spending which contributed to record high overall sales in the fourth quarter of 2021[3].

Canadian businesses continue to face a number of challenges and opportunities in 2022, including:

- Significant supply chain backlogs and disruptions impacting the movement of goods[4].
- Rising interest rates and inflation leading to increases in the cost of living and cost of goods[5].
- Shortage of retail talent encouraging retailers to improve retail jobs, wages and benefits[6].
- Renewed focus on "conscious consumerism"[7] by providing sustainable products and following triple bottom line (people, planet, profit) business models[8].
- Retail vacancy rates continue to decline[9]
- Both new and established businesses are using pop-ups to activate vacant spaces.[10]

3.3 Retail Trends and the Oil and Gas Industry

Changes in the oil and gas industry are leading to retail trends of interest to the Lloydminster business community. Combined gas and convenience stores are responding to the following 2022 trends that represent opportunities for such businesses[11]:

- With gas prices at record highs, consumers are choosing to gas up more frequently with smaller, more affordable amounts rather than full-tank fill-ups. More frequent visits to gas stations mean more opportunities for the attached retailer to draw customers inside using incentive programs and strategic marketing.
- Loyalty programs are becoming a more important factor impacting which gas stations consumers choose to use.
- Consumers are looking to convenience stores to become a one-stop-shop more than they did pre-pandemic in their desire to avoid crowded big box stores and limit stops needed to complete errands, leading convenience stores to diversify products and consider omnichannel retail options.

Similarly, fuel-retail is taking an increasingly smaller share of the market in developed countries due to improved fuel efficiency and a rise in electric vehicles (the same is not true for developing countries)[12]. Non-fuel retail at gas stations is projected to become more important for fuel retailers, seeing businesses adding or expanding convenience retail, and also adding general grocery stores and electric vehicle charging stations.

1 Eight Ways COVID Will Transform the Economy and Disrupt Every Business, Stackhouse, 2020
2 Canadian Retail Marketbeat Report, Cushman Wakefield, Q42021
3 Ibid
4 Headwinds and Tailwinds, Avison Young, 2022
5 Top Trends that will Shape the Near-and Long-Term State of the Retail Industry in Canada (Part 1), S., Terry, Retail Insider, 2022
6 Top Trends.... Part 1, Retail Insider, 2022

7 2022 Retail Outlook, Colliers, 2022
8 Top Trends....Part 2, Retail Insider, 2022
9 2022 Retail Outlook, Colliers, 2022
10 Pop-Up Retail in Canada Grows Significantly Amid COVID-19 :Experts, M., Toneguzzi, Retail Insider, 2020
11. De Haan, P., 5 Petroleum Trends Show Silver Lining for C-Stores in 2022 , Supply & Demand Chain Executive Magazine, February 13, 2022
12. McKinsey & Company, What are the trends disrupting the fuel-retail industry?, June 7, 2021

3.4 E-Commerce, Omnichannel & Smaller Spaces

COVID-19 has accelerated some retail trends that were already underway pre-pandemic[1]. Technology is becoming more and more integrated into how businesses connect with customers. Due to consumer demand, Canadian's have seen growth of e-commerce along with demand for more flexible shopping and order fulfillment options[2]. E-commerce sales in Canada grew from 6.8% of retail sales in 2019[3] to ~11% in 2021[4] (see **Figure 3-1**), showing increased consumer interest in online shopping throughout the pandemic.

Demand for e-commerce, omnichannel retail, and delivery services is expected to continue to grow[5,6]. In 2021, 11% of total retail sales and 19% of accommodation and food services were made online, with retail and wholesale businesses most likely to invest in e-commerce capabilities in 2022[7].

Figure 3-1 illustrates the spike that resulted from the pandemic over the period 2020 to 2021 and 2021 to 2022. However, recent trends have started to show that e-commerce sales are likely to drop to 5% (year-to-date as of July is 5.5%) which is consistent with the pre-pandemic trajectory, though still trending upward.

The majority of purchases still occur in brick and mortar establishments, with consumer preference toward smaller, free-standing stores over enclosed shopping malls [8]. The pandemic quickened the structural decline of malls, which were struggling even before the pandemic, while bolstering automation and the technological revolution[9].

Smaller building footprints are becoming the size of choice for a range of retailers, even those that have traditionally gone big like Ikea, Target, Walmart, and Amazon[10]. In the grocery sector, even brands like Loblaws have created smaller, urban models like CityMarket. Artificial intelligence enables certain traditionally large store's choice to go small, as in Walmart's little "Store Number 8" in NY State) where it manages check-outs, accesses products, monitors user interests, and integrates sales.

Figure 3-1. Retail e-commerce sales as a percentage of total retail sales in Canada (as of July 2022)
(Source: Statistics Canada)

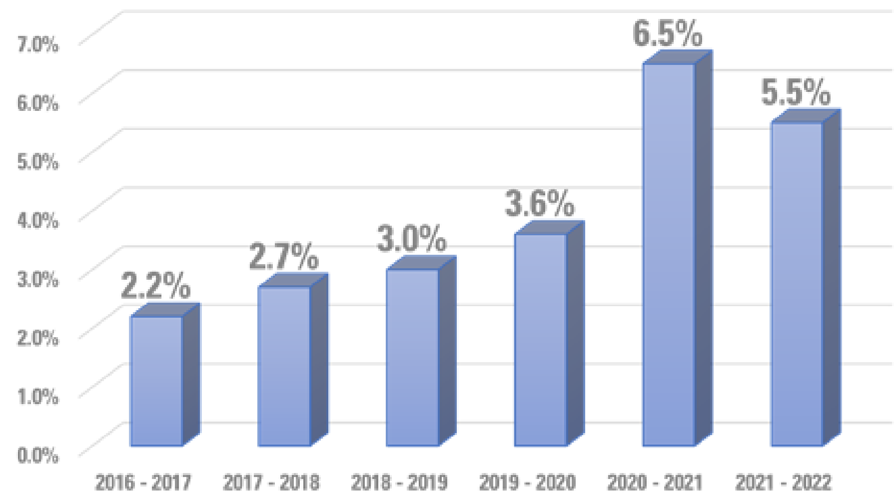


Figure 3-2. Retail e-commerce sales growth forecast 2021 to 2025
(Source: Statistics Canada)

1 Accelerating shifts driving a radical rethink of the customer journey, PWC, 2020
2 Consumer Demand for Greater Flexibility and Options Leading to Increasing Retail Innovation, S., Terry, Retail Insider, 2022
3 The Top Retail Trends in Canada in 2020 to Watch, McKinnon, 2020
4 Canadian Retail Marketbeat Report, Cushman Wakefield, Q42021
5 Ibid
6 Canadian Trends and Insights, Canadian Chamber of Commerce, Q2 2022
7 Ibid
8 Four Trends Reshaping the Future of Retail, B., Peterson, Forbes, 2021
9 Top Trends that will Shape the Near-and Long-Term State of the Retail Industry in Canada (Part 2), S., Terry, Retail Insider, 2022
10 Shrinking Retail Space Trend 2020, Geron, 2020

3.5 Storefront Improvement Programs

Storefront Improvement Programs (SIP) have become a popular strategy for communities to revitalize under-performing urban centres, such as Lloydminster's Downtown. Such programs are a useful tool to encourage building owners or business owners to make improvements to the look and feel of their properties in ways that they may not otherwise have budgeted.

SIPs can be flexible to fit the needs and the goals of a given community. For instance, they can target a specific use (e.g., commercial buildings, mixed use buildings), ground floor only, street-facing walls only, or they can be for all of and any building located in a certain area. Most programs typically apply to a set area, like a business improvement district or a downtown core area.

Funding plans for SIPs vary widely depending on community size, scope, and budget, but the most common approach is to offer a 50% matching grant or loan for improvements up to a pre-set maximum as seen in **Table 3-1** which details comparable Storefront Improvements programs in Alberta.

Eligible expenses commonly include professional, labour, and material costs related to the following:

- Municipal planning permit fees
- Façade cleaning, painting and recladding
- Restoration or addition of exterior architectural features/masonry
- Exterior windows, doors, entrances, signage, lighting, and seating
- New or replacement weather protection (e.g., awnings, canopies)
- Accessibility features (e.g., ramps, handrails, wider entrances, automated doors)
- Flowerpots, window boxes, and hanging baskets

Such programs are already on the City's radar. Lloydminster's Downtown ARP (2020) includes a Building Improvement Grant as a short term (0-5 years) implementation goal to support business development. It also includes Facade Improvement Grants as a medium term (5-10 years) business development goal, identifying the goal as having the highest level of community support. Pursuing such initiatives would aid the City in combating the negative perceptions about Downtown that discourage businesses from locating there and prevent citizens from choosing to shop in Downtown (see Section 6.0 of this report for a summary of community perspectives on Lloydminster's Downtown).

Table 3-1. Storefront Improvement Program Examples
(Source: FBM)

Program	Available Funding	Eligible Buildings	Eligible Work
City of Fort Saskatchewan, AB ***Storefront Improvement Incentive*** Population: 27,000 (2019)	Max: $10,000 (up to $30,000 for multi-tenant building) 1. Not to exceed 65% for goods/services supplied by Local Business 2. Not to exceed 50% for goods/services supplied by non-Local Business	• Property must be located within the City of Fort Saskatchewan. • Greenfield or previously undeveloped lands are ineligible.	• Redesigning/repairing/restoring/installing storefront features, including windows, paint, masonry, architectural features, exterior cladding, shelters (like awnings), lighting, historic features, signage. • Accessibility improvements • Curbside enhancements (e.g., seating) • Professional fees
City of Grande Prairie, AB ***Facade Improvement Grant*** Population: 63,000 (2016)	50% Max: $750 per Front Foot up to total of $50,000	Located in Downtown Incentives Program Boundary	• Design must achieve a minimum of five design goals related to benefiting the pedestrian realm, public safety, winter conditions, and innovative and artistic design • Improvements to buildings' appearance
Regional Municipality of Wood Buffalo (Fort McMurray), AB ***Downtown Revitalization Incentives Program*** Population: 67,000 (2016)	50% Max: $75,000 for comprehensive projects & $25,000 for simple projects.	• Located within downtown • An existing commercial, institutional or mixed-use building	• Municipal permitting fees, professional, labour, and material costs related to cleaning, painting, recladding, and restoring/adding architectural features, windows, doors, entrances, weather protection, signage, lighting, flower pots, and accessibility features. • Must be public street facing, though parking lot facing may be eligible

3.6 Lloydminster Visitors

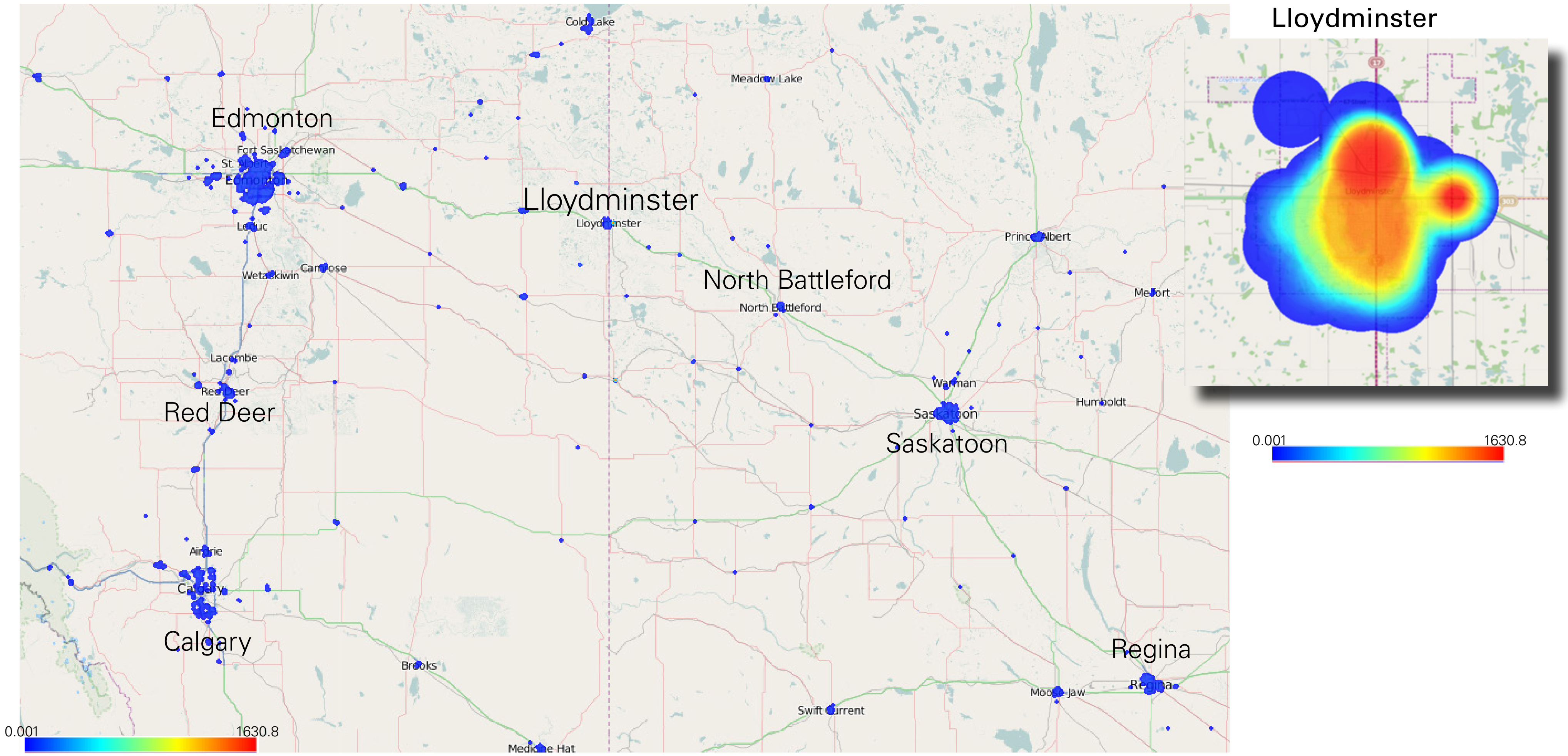
As part of this Gap Analysis, mobile phone tracking data was used to determine where Lloydminster visitors originate from. Data was provided by Manifold Data Mining Inc and represents people who stopped in Lloydminster between June-August 2021. This data informs the trade area boundaries and miscellaneous inflow analysis detailed in Section 4.0.

Data Collection Methodology

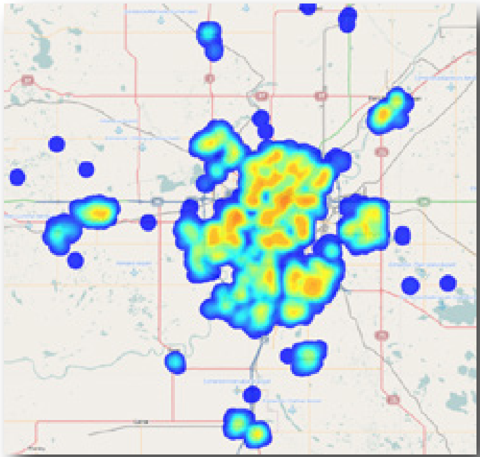
Mobile location data is obtained from smartphone apps with 5m-25m precision. These are apps that use location such as couponing, dating, weather, locating nearby services, and tourism apps. Trip counts are then validated with 2,500+ permanent traffic counters in Canada. Location pings are collected from 110 million+ devices across Canada and the US (i.e. approximately 33% penetration of the population). Approximately 40 billion location records per month are converted to trips and locked to routes with machine learning models that connect pings along the most viable path a vehicle can take.

Figure 3-3. Lloydminster Visitors Mobile Phone Tracking Data for Summer 2021

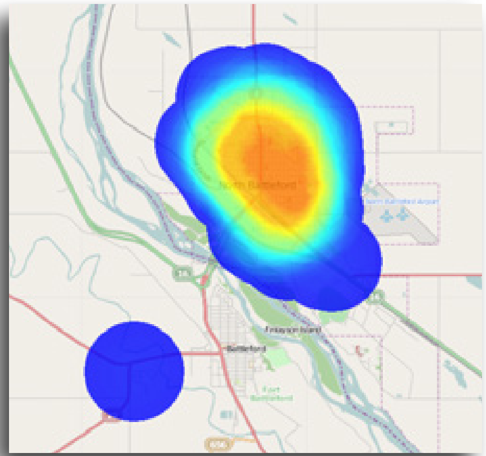
(Source: Manifold Data Mining Inc & FBM)



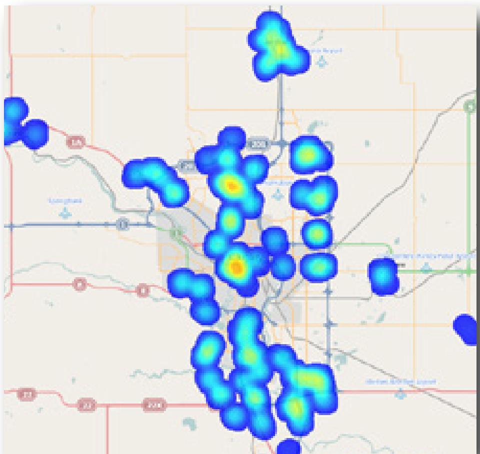
Edmonton



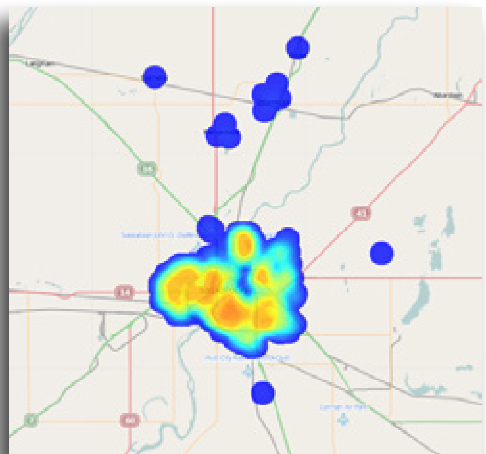
North Battleford



Calgary



Saskatoon



Trips and traffic are scaled up with machine learning models and compared against 2,500+ permanent traffic counters in Canada. Manifold performs custom weighting of home postal codes within the catchment area using drivers/number of cars per household, smartphone ownership, location-based app usage statistics from Vividata.

As illustrated in **Figure 3-3**, Highway 16 is a popular travel route for rubber tire visitors traveling between Alberta and Saskatchewan. Visitors frequently originated in Edmonton and Saskatoon, with strong representation from North Battleford as well. Residents of smaller communities to the north and south also frequent Lloydminster though they are less visually prominent given their population size.

Within Lloydminster, residents stop frequently in the city. Notably, higher density residential areas north of Highway 16 show high visitation which reflects the denser urban form and higher population of the area.

3.7 Border City Dynamics

Being a bi-provincial city comes with unique challenges, surrounding many regulatory settings such as health care, but also in the realm of retail where regulations in Alberta and Saskatchewan cannot necessarily harmonize. In particular this impacts industries such as food production, alcohol, automotive. The Chamber of Commerce published a recent document titled "Lloydminster Bi-Provincial Challenges 2022".

Due to its unique geographic location, there are specific tax rules in place to help facilitate retail sales within Lloydminster. Lloydminster is exempt of PST with the exception of vehicles, lodging, telecommunication services, electricity for commercial users, and insurance contracts.

Hotels on the Saskatchewan side of Lloydminster are required to charge and remit PST, which has led to concerns of lost business to Alberta hotels who do not have to charge PST. This tax discrepancy in Lloydminster creates an uneven playing field for hotels and Saskatchewan-based hotels are losing commercial clients to the hotels in Lloydminster, Alberta.

Alcohol cannot cross provincial borders. Businesses in this industry must comply with these regulations which can be challenging in a very competitive market. Lloydminster Saskatchewan has an exemption on the 10% Saskatchewan Liquor Consumption Tax, which helps these Saskatchewan businesses to compete with the Alberta businesses who are not subject to a 10% Liquor Consumption Tax. However, the requirements to source alcohol from SLGA in Regina causes the cost of the products to still be higher than Alberta competitors within Lloydminster. Furthermore, craft brewers located in Lloydminster cannot easily sell their products across the border in Lloydminster. The craft beer then needs to be shipped to SLGA in Regina, to have them then shipped back to Lloydminster, exponentially increasing costs and substantial red tape and approval requirements.

4.0 Trade Area Profile

4.1 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 Areas from which Lloydminster's retail sales are most frequently and likely to be sourced. 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 demographic and spending habits that provide insight as to the type of compatible retail tenants, the amount of retail floorspace supportable in the market, and the current inflow or outflow of retail sales. Generated trade areas portray the market to prospective tenants, developers, and investors.

Major considerations in defining Retail Trade Areas were applied to determine the most realistic Trade Areas and help sensitize potential market share inputs of corresponding Trade Area retail spending. A Retail Trade Area was delineated to identify the geographic region from which regular patronage could be expected based on a series of boundary determinants including:

1. Transportation networks, including streets and highways, which affect access, drive times, commuting and employment distribution patterns;
2. Major infrastructure projects both planned or under development which could affect future travel patterns;
3. Overall community development vision, including an understanding of key nodes' characteristics;
4. Local and regional competitive environment, present and future;
5. Proposed generative uses (retail, cultural, civic, etc.) and their relationship within the wider market;
6. Significant natural and man-made barriers (e.g. mountains, water features, highways, industrial areas);
7. De facto barriers resulting from notable socioeconomic differentiation; and
8. Patterns of existing and future residential and commercial development.

Proximity to major urban centres and established transportation routes were core considerations for the creation of Lloydminster's two trade areas. The majority of consumers originate from Lloydminster's Primary Trade Area (PTA) which is oriented toward the north west within a two hour drive time. The PTA reflects Lloydminster's position as a service centre for smaller nearby communities including Cold Lake, AB; Innisfree, AB; Macklin, SK; and Maidstone, SK. The PTA is larger than the trade area identified in the 2019 Northeast ASP Market Study which included communities less than a 30 minute drive from Lloydminster.

Recognizing that communities to the east may be more drawn toward Saskatoon, Lloydminster's Secondary Trade Area (STA) includes consumers who may choose to shop in Lloydminster less frequently than those within the PTA. Its boundary is oriented toward the north and south, and include the communities of North Battleford, SK; Meadowlake, SK and Wilkie, SK. Communities nearer to Edmonton are excluded from the STA because it is assumed they will tend to choose Edmonton over Lloydminster.

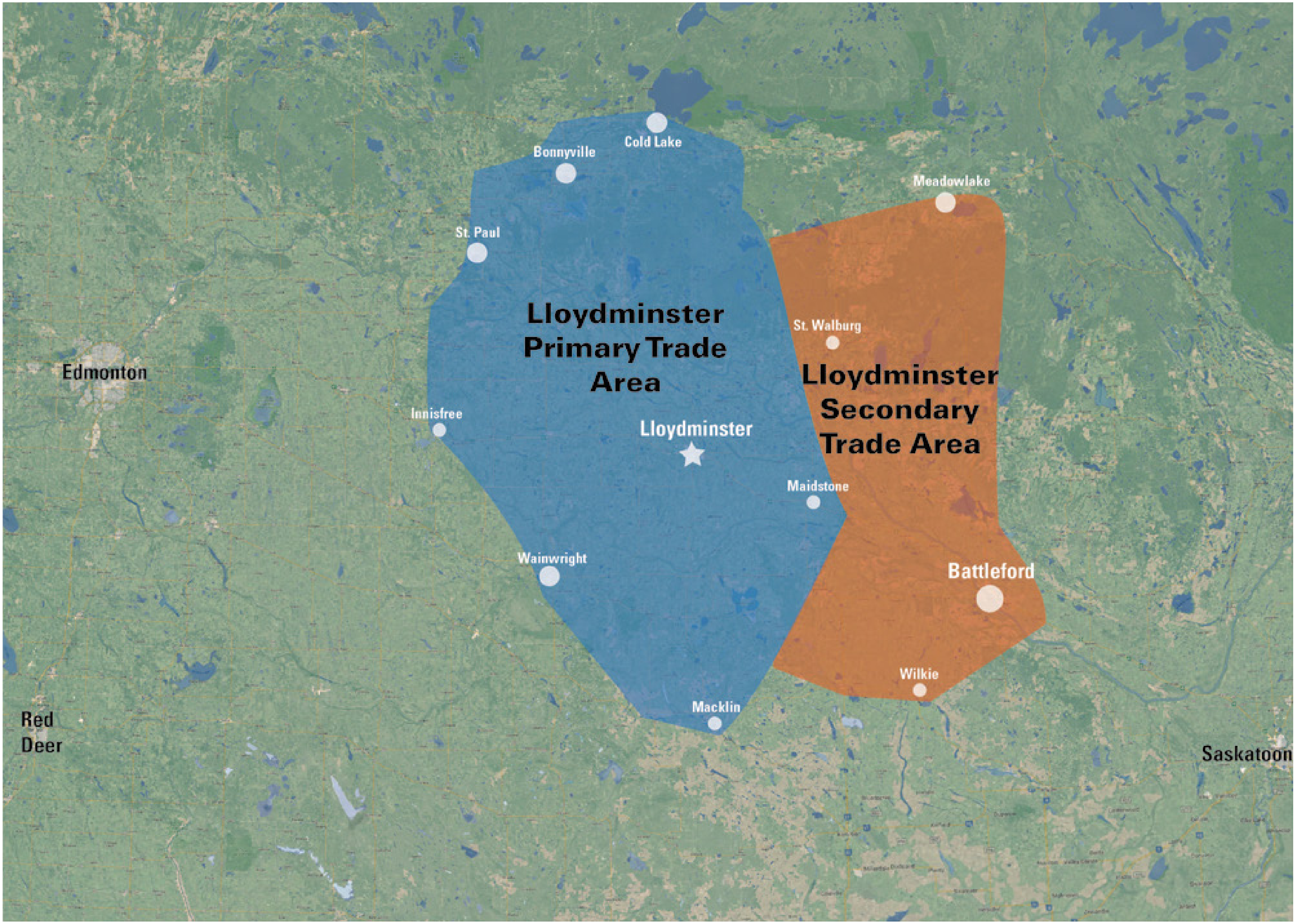
4.2 Demographics and Projections

The most recent Statistics Canada Census release as well as Manifold Data Mining Inc (2021), a leading supplier of demographic and consumer expenditure information, was used to tabulate population estimates and growth forecasts for the identified Trade Areas. These forecasts represent a snapshot based on demographic models and do not account for future planning realities that may influence population growth.

Estimated for the year-end 2021, the population of the Primary Trade Area is 136,363 and is projected to grow by 0.82% annually over the next three years (**Table 4-2 and Table 4-3**). The PTA is demographically similar to Alberta with a slightly higher percentage of people under the age of 14 and a slightly lower percentage of people aged 65 and over (**Table 4-4 and Figure 4-2**). Within the PTA, 15.6% of the population identifies as being of Aboriginal origins which is slightly lower than Saskatchewan (16.2%) and higher than Alberta (7.5%) as shown in **Table 4-2**. The average household income of the PTA is $131,395 which is lower than the Alberta average of $152,656 (**Table 4-5**). The household income breakdown for the PTA is comparable to Alberta with a slightly lower percentage of earners over $100,000 (**Figure 4-6**). Of those over the age of 15 in the PTA, 48.63% have a post-secondary certificate, diploma or degree which is lower than the Alberta benchmark (55.34%) and comparable to the Saskatchewan benchmark (49.23%).

Figure 4-1. Lloydminster Primary and Secondary Trade Areas

(Source: FBM)



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

Table 4-2. Demographics Summary

(Source: FBM and Manifold Data Mining Inc.)

Attribute	Benchmark - Alberta		Saskatchewan			Lloydminster PTA			Lloydminster STA		
	value	percent	value	percent	index	value	percent	index	value	percent	index
SUMMARY											
Total number of labour force age 15 and over	2,608,042		659,317			75,914			25,403		
Total population in families	3,748,580		980,618			111,596			42,702		
Average number of persons per census family	3.01		2.97		99	2.97		99	2.97		99
Total population in private households	4,501,825		1,185,488			132,208			51,313		
Total number of census families in private households	1,225,750		327,923			37,541			14,393		
Average number of persons in private households	2.64		2.49		94	2.58		98	2.49		94
Total number of private households	1,704,013		476,236			51,262			20,578		
Total population	4,614,014		1,218,578			136,363			52,866		
Total population age 15 and over	3,751,235		978,835			107,857			41,258		
POPULATION AGE											
Population age 0-14	862,779	18.70%	239,743	19.67%	105	28,505	20.90%	112	11,608	21.96%	117
Population age 15-24	546,409	11.84%	148,564	12.19%	103	17,588	12.90%	109	6,934	13.12%	111
Population age 25-34	697,969	15.13%	173,123	14.21%	94	21,150	15.51%	103	6,665	12.61%	83
Population age 35-44	724,240	15.70%	172,239	14.13%	90	21,286	15.61%	99	6,838	12.93%	82
Population age 45-54	575,439	12.47%	136,489	11.20%	90	15,339	11.25%	90	5,565	10.53%	84
Population age 55-64	554,697	12.02%	149,986	12.31%	102	15,277	11.20%	93	6,289	11.90%	99
Population age 65+	652,482	14.14%	198,434	16.28%	115	17,217	12.63%	89	8,968	16.96%	120
ETHNICITY ORIGINS											
Total population by ethnic origin	4,614,010		1,218,580			136,363			52,866		
British Isles origins	1,825,160	39.56%	486,455	39.92%	101	59,145	43.37%	110	20,441	38.67%	98
French origins	476,550	10.33%	142,565	11.70%	113	21,635	15.87%	154	7,986	15.11%	146
Canadian	1,044,050	22.63%	249,548	20.48%	90	39,465	28.94%	128	11,378	21.52%	95
Aboriginal origins	349,017	7.56%	197,756	16.23%	215	21,281	15.61%	206	15,368	29.07%	385
North American Indian	229,421	4.97%	144,965	11.90%	239	14,204	10.42%	210	11,274	21.33%	429
Inuit	4,522	0.10%	658	0.05%	50	185	0.14%	140	39	0.07%	70
Metis	128,719	2.79%	62,905	5.16%	185	7,789	5.71%	205	5,035	9.52%	341
DWELLING											
Average dwelling value $	$567,449		$378,525		67	$353,920		62	$257,830		45
Home owners	1,237,293	72.60%	343,032	71.99%	99	36,247	70.71%	97	13,877	67.44%	93
Home tenants	455,560	26.73%	120,690	25.33%	95	13,898	27.11%	101	5,515	26.80%	100
Band housing	11,507	0.68%	12,783	2.68%	394	1,117	2.18%	321	1,186	5.76%	847
HOUSEHOLDS											
One-family households	1,162,828	68.24%	315,488	66.25%	97	32,732	63.85%	94	12,804	62.22%	91
Multiple-family households	40,844	2.40%	8,796	1.85%	77	885	1.73%	72	426	2.07%	86
Non-family households	500,341	29.36%	151,952	31.91%	109	15,181	29.61%	101	6,524	31.71%	108
EDUCATION											
Total population aged 15 years and over by highest certificate, diploma, or degree	3,751,240		978,835			107,857			41,258		
No certificate, diploma, or degree	629,238	16.77%	199,915	20.42%	122	23,752	22.02%	131	10,728	26.00%	155
Secondary (high) school diploma or equivalency certificate	1,046,120	27.89%	297,070	30.35%	109	31,656	29.35%	105	11,596	28.11%	101
Post-secondary certificate, diploma, or degree	2,075,880	55.34%	481,850	49.23%	89	52,449	48.63%	88	18,934	45.89%	83
Apprenticeship or trades certificate or diploma	359,235	9.58%	101,210	10.34%	108	13,646	12.65%	132	4,684	11.35%	118
Trades certificate or diploma	109,959	2.93%	43,093	4.40%	150	4,501	4.17%	142	2,093	5.07%	173
Certificate of Apprenticeship or Certificate of Qualification	249,276	6.65%	58,117	5.94%	89	9,145	8.48%	128	2,591	6.28%	94
College, CEGEP, or other non-university certificate or diploma	715,309	19.07%	166,750	17.04%	89	22,687	21.03%	110	7,430	18.01%	94
University certificate or diploma below bachelor level	115,856	3.09%	33,149	3.39%	110	3,174	2.94%	95	1,723	4.18%	135
University certificate, diploma, or degree at bachelor level or above	885,478	23.61%	180,742	18.47%	78	12,943	12.00%	51	5,097	12.35%	52
Bachelor's degree	617,708	16.47%	130,010	13.28%	81	10,510	9.74%	59	3,616	8.76%	53

Table 4-3. Population Projections

(Source: FBM and Manifold Data Mining Inc.)

Attribute	Benchmark - Alberta		Saskatchewan			Lloydminster PTA			Lloydminster STA		
	value	percent	value	percent	index	value	percent	index	value	percent	index
PROJECTIONS											
Annual population growth in the period: Next 3 years		1.00%		1.00%	100		0.82%	82		0.54%	54
Annual household growth in the period: Next 3 years		1.00%		1.00%	100		0.75%	75		0.46%	46
Annual family growth in the period: Next 3 years		1.00%		1.00%	100		0.95%	95		0.49%	49
Annual population growth in the period: Next 5 years		1.65%		1.38%	84		1.39%	84		0.88%	53
Annual household growth in the period: Next 5 years		1.34%		1.24%	93		1.27%	95		0.76%	57
Annual family growth in the period: Next 5 years		1.62%		1.31%	81		1.56%	96		0.78%	48
Annual population growth in the period: 5 to 10 years from current year		1.55%		1.30%	84		0.81%	52		0.55%	35
Annual household growth in the period: 5 to 10 years from current year		1.26%		1.17%	93		0.73%	58		0.43%	34
Annual family growth in the period: 5 to 10 years from current year		1.51%		1.22%	81		0.95%	63		0.42%	28
POPULATION GROWTH											
Current year total population	4,614,014		1,218,578			136,363			52,866		
3-Year Projections - Total population	4,849,462		1,270,397			142,106			54,348		
5-Year Projections - Total population	5,006,427		1,304,944			146,261			55,327		
10-Year Projections - Total population	5,405,518		1,391,672			152,505			56,978		
HOUSEHOLD GROWTH											
Current year total number of households	1,704,013		476,236			51,262			20,578		
3-Year Projections - Total number of households	1,774,641		494,435			53,249			21,070		
5-Year Projections - Total number of households	1,821,726		506,568			54,664			21,394		
10-Year Projections - Total number of households	1,939,743		536,830			56,767			21,877		
FAMILY GROWTH											
Current year total number of census families	1,245,619		330,014			37,541			14,393		
3-Year Projections - Total number of census families	1,308,307		343,369			39,383			14,770		
5-Year Projections - Total number of census families	1,349,878		352,244			40,630			15,001		
10-Year Projections - Total number of census families	1,454,775		374,315			42,660			15,358		
HOUSEHOLD INCOME GROWTH											
Current year average household income	$152,656		$111,182		73	$131,394		86	$92,923		61
3-Year Projections - Average household income	$166,534		$124,164		75	$141,625		85	$104,026		62
5-Year Projections - Average household income	$185,758		$142,026		76	$155,906		84	$119,958		65
10-Year Projections - Average household income	$236,959		$182,178		77	$190,216		80	$154,277		65

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

Table 4-4. Detailed Population Breakdown

(Source: FBM and Manifold Data Mining Inc.)

Attribute	Benchmark - Alberta		Saskatchewan			Lloydminster PTA			Lloydminster STA		
	value	percent	value	percent	index	value	percent	index	value	percent	index
POPULATION AGE GROUP											
Total population by age groups	4,614,010		1,218,580			136,363			52,866		
0-14	862,779	18.70%	239,743	19.67%	105	28,505	20.90%	112	11,608	21.96%	117
0-4	282,834	6.13%	79,316	6.51%	106	9,277	6.80%	111	3,859	7.30%	119
5-9	291,321	6.31%	80,923	6.64%	105	9,525	6.99%	111	3,936	7.45%	118
10-14	288,623	6.26%	79,504	6.52%	104	9,703	7.12%	114	3,812	7.21%	115
15-64	3,098,750	67.16%	780,402	64.04%	95	90,640	66.47%	99	32,291	61.08%	91
15-19	264,923	5.74%	73,094	6.00%	105	8,775	6.44%	112	3,523	6.66%	116
20-24	281,486	6.10%	75,470	6.19%	101	8,812	6.46%	106	3,412	6.45%	106
25-29	322,644	6.99%	82,543	6.77%	97	9,662	7.09%	101	3,153	5.96%	85
30-34	375,325	8.13%	90,580	7.43%	91	11,488	8.42%	104	3,512	6.64%	82
35-39	384,227	8.33%	90,933	7.46%	90	11,453	8.40%	101	3,514	6.65%	80
40-44	340,013	7.37%	81,306	6.67%	91	9,833	7.21%	98	3,324	6.29%	85
45-49	300,211	6.51%	70,063	5.75%	88	8,009	5.87%	90	2,946	5.57%	86
50-54	275,228	5.97%	66,426	5.45%	91	7,330	5.38%	90	2,619	4.95%	83
55-59	283,098	6.14%	75,202	6.17%	100	7,941	5.82%	95	3,073	5.81%	95
60-64	271,599	5.89%	74,784	6.14%	104	7,336	5.38%	91	3,216	6.08%	103
65 and over	652,482	14.14%	198,434	16.28%	115	17,217	12.63%	89	8,968	16.96%	120
65-69	222,629	4.83%	64,389	5.28%	109	5,643	4.14%	86	2,954	5.59%	116
70-74	168,478	3.65%	48,755	4.00%	110	4,104	3.01%	82	2,175	4.11%	113
75-79	110,003	2.38%	33,414	2.74%	115	2,894	2.12%	89	1,440	2.72%	114
80-84	72,832	1.58%	23,796	1.95%	123	2,084	1.53%	97	1,064	2.01%	127
85 and over	78,541	1.70%	28,081	2.30%	135	2,493	1.83%	108	1,335	2.52%	148
85-89	49,358	1.07%	17,025	1.40%	131	1,453	1.07%	100	769	1.45%	136
90-94	22,332	0.48%	8,271	0.68%	142	775	0.57%	119	416	0.79%	165
95-99	5,985	0.13%	2,372	0.20%	154	229	0.17%	131	109	0.21%	162
100 and over	866	0.02%	412	0.03%	150	36	0.03%	150	40	0.08%	400
Average age of total population	38.60		39.10		101	36.90		96	38.40		99
Median age of total population	37.60		37.60		100	36.00		96	37.10		99

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

Estimated for the year-end 2021, the population of the **Secondary Trade Area** is 52,866 and projected to grow by 0.54% annually over the next three years (**Table 4-2 and Table 4-3**). Demographically, the STA more closely resembles Saskatchewan then Alberta with a relatively high percentage (35.08%) of its population under the age of 24 compared to 30.54% in Alberta and 31.86% in Saskatchewan (**Table 4-4 and Figure 4-2**). A significant portion (29.0%) of the STA population identifies as being of Aboriginal origin (**Table 4-2**). The average household income of the STA is $92,923 which is lower than both the Alberta ($152,656) and Saskatchewan ($111,182) averages (**Table 4-5**). The household income breakdown for the STA shows a high percentage of earners in the under $50,000 categories and a low percentage of earners over $100,000 when compared to Alberta, Saskatchewan and the PTA (**Figure 4-6**). Of those over the age of 15 in the STA, 45.89% have a post-secondary certificate, diploma or degree with a high percentage (11.35%) of people with an apprenticeship or trades certificate or diploma compared to the Alberta average (9.58%).

4.2.1 CanaCode Lifestyle Clusters

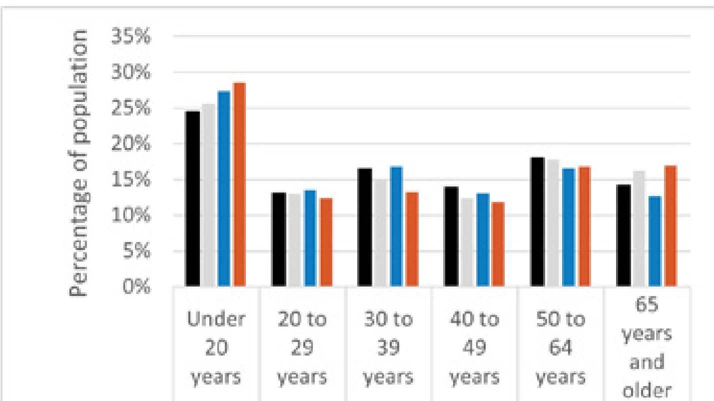
CanaCode Lifestyles is a customer segmentation that combines demographic, household spending, consumer lifestyle, attitude and behavioural databases, with a view of a target market's choices, preferences and shopping patterns. The two-tier lifestyle segmentation system works at the six-digit postal code level and classifies Canada's consumer landscape into 18 distinct lifestyle segments.

Cluster I - Urban Life in Small Towns is the dominant CanaCode Lifestyle Cluster in both the Primary and Secondary Trade Areas representing 29.2% and 30.5% of the respective populations (**Figure 4-3**). Within the PTA, Cluster E - Buy Me a New Home accounts 14.7% of the population, while in the STA Cluster J - Joyful Country represents 25.1% of the population.

A full listing of the CanaCode Lifestyle Clusters can be viewed at www.polarisintelligence.com/canacode/

Figure 4-2. Detailed Population Breakdown

(Source: FBM and Manifold Data Mining Inc.)



	Under 20 years	20 to 29 years	30 to 39 years	40 to 49 years	50 to 64 years	65 years and older
Alberta	24.44%	13.09%	16.46%	13.88%	18.00%	14.14%
Sask.	25.67%	12.96%	14.89%	12.42%	17.76%	16.28%
Lloyd PTA	27.34%	13.55%	16.82%	13.08%	16.58%	12.63%
Lloyd STA	28.62%	12.41%	13.29%	11.86%	16.84%	16.96%

Figure 4-3. PTA & STA CanaCode Lifestyle Cluster #1

(Source: Manifold Data Mining Inc.)

Table 4-5. Household Income Breakdown

(Source: FBM and Manifold Data Mining Inc.)

Attribute	Benchmark - Alberta		Saskatchewan			Lloydminster PTA			Lloydminster STA		
	value	percent	value	percent	index	value	percent	index	value	percent	index
HOUSEHOLD INCOME											
Total number of households	1,704,360		476,504			51,262			20,578		
Average household income $	$152,656		$111,182		73	$131,395		86	$92,923		61
Median household income $	$111,708		$86,151		77	$108,433		97	$76,426		68
Household with income under $5,000	13,814	0.81%	5,072	1.06%	131	375	0.73%	90	231	1.12%	138
Household with income $5,000 to $9,999	15,837	0.93%	5,300	1.11%	119	464	0.90%	97	343	1.67%	180
Household with income $10,000 to $14,999	18,431	1.08%	7,140	1.50%	139	583	1.14%	106	458	2.23%	206
Household with income $15,000 to $19,999	28,344	1.66%	14,325	3.01%	181	894	1.74%	105	779	3.79%	228
Household with income $20,000 to $24,999	44,130	2.59%	17,917	3.76%	145	1,525	2.97%	115	934	4.54%	175
Household with income $25,000 to $29,999	44,242	2.60%	17,270	3.62%	139	1,586	3.09%	119	948	4.61%	177
Household with income $30,000 to $34,999	46,514	2.73%	18,408	3.86%	141	1,594	3.11%	114	967	4.70%	172
Household with income $35,000 to $39,999	50,193	2.95%	18,873	3.96%	134	1,655	3.23%	109	914	4.44%	151
Household with income $40,000 to $44,999	51,358	3.01%	19,273	4.05%	135	1,714	3.34%	111	921	4.48%	149
Household with income $45,000 to $49,999	53,213	3.12%	19,284	4.05%	130	1,724	3.36%	108	922	4.48%	144
Household with income $50,000 to $59,999	83,493	4.90%	28,165	5.91%	121	2,312	4.51%	92	1,187	5.77%	118
Household with income $60,000 to $69,999	99,432	5.83%	31,458	6.60%	113	2,963	5.78%	99	1,361	6.62%	114
Household with income $70,000 to $79,999	103,317	6.06%	31,062	6.52%	108	3,211	6.26%	103	1,342	6.52%	108
Household with income $80,000 to $89,999	102,749	6.03%	29,937	6.28%	104	3,149	6.14%	102	1,311	6.37%	106
Household with income $90,000 to $99,999	101,163	5.94%	28,413	5.96%	100	3,196	6.24%	105	1,216	5.91%	99
Household with income $100,000 and over	848,132	49.76%	184,607	38.74%	78	24,316	47.43%	95	6,743	32.77%	66
Household with income $100,000 to $124,999	164,328	9.64%	42,941	9.01%	93	4,630	9.03%	94	1,581	7.68%	80
Household with income $125,000 to $149,999	169,198	9.93%	41,547	8.72%	88	5,156	10.06%	101	1,564	7.60%	77
Household with income $150,000 to $199,999	193,971	11.38%	44,567	9.35%	82	5,625	10.97%	96	1,552	7.54%	66
Household with income $200,000 and over	320,635	18.81%	55,552	11.66%	62	8,905	17.37%	92	2,046	9.94%	53

Figure 4-4. Primary Trade Area CanaCode Lifestyle Cluster #2

(Source: Manifold Data Mining Inc.)

Figure 4-5. Secondary Trade Area CanaCode Lifestyle Cluster #2

(Source: Manifold Data Mining Inc.)

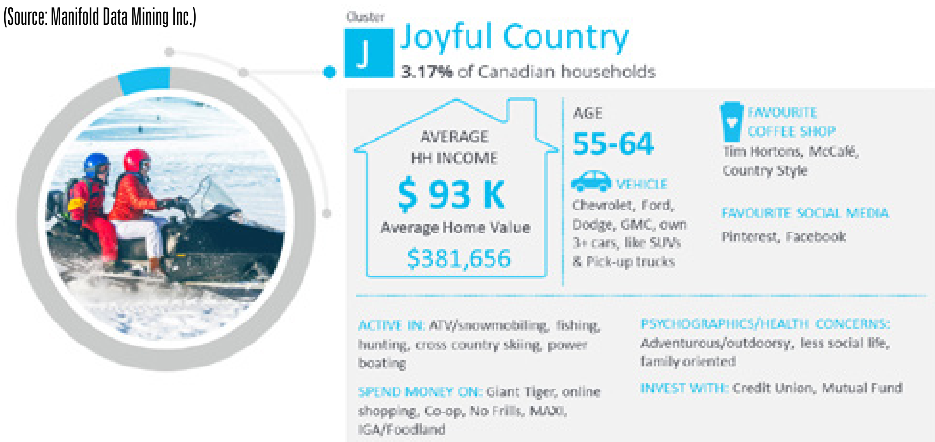
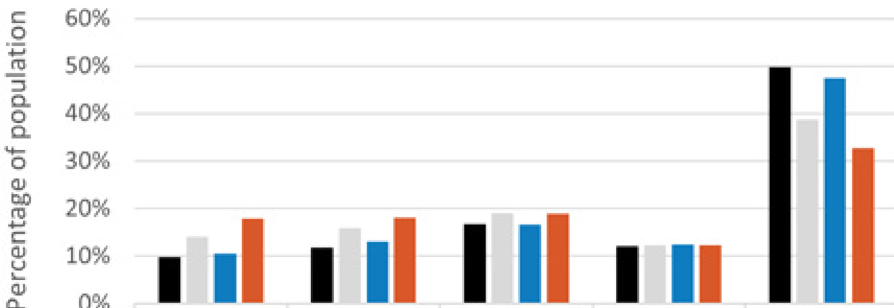


Figure 4-6. Household Income Breakdown

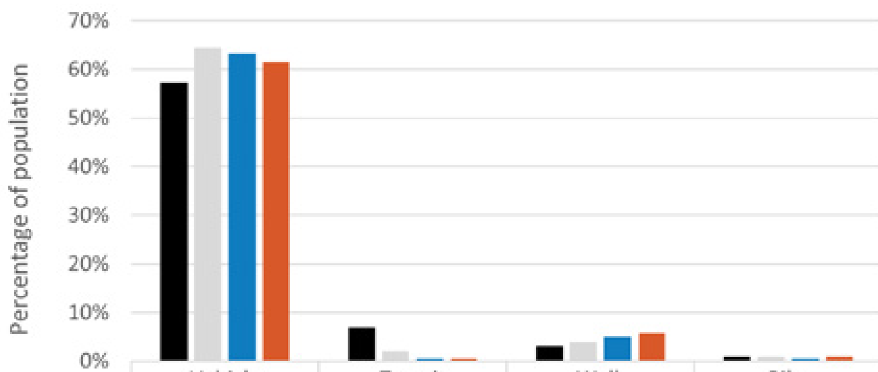
(Source: FBM and Manifold Data Mining Inc.)



	Under $30,000	$30,000 to $50,000	$50,000 to $80,000	$80,000 to $100,000	Over $100,000
Alberta	9.67%	11.81%	16.79%	11.97%	49.76%
Sask.	14.06%	15.92%	19.03%	12.24%	38.74%
Lloyd PTA	10.57%	13.04%	16.55%	12.38%	47.43%
Lloyd STA	17.96%	18.10%	18.91%	12.28%	32.77%

Figure 4-7. Labour Force Summary

(Source: FBM and Manifold Data Mining Inc.)



	Vehicle	Transit	Walk	Bike
Alberta	57.22%	7.00%	3.16%	0.86%
Sask.	64.46%	2.10%	4.04%	0.86%
Lloyd PTA	63.25%	0.58%	5.04%	0.52%
Lloyd STA	61.56%	0.51%	5.79%	0.86%

4.3 Summary of Employment & Labour

Figure 4-7 and Table 4-6 provide a summary of the estimated 2021 Labour Force profile for Lloydminster's Primary and Secondary Trade Areas. Within both the PTA and STA, vehicles are the primary mode of transportation amongst commuters. Public transit use (0.58% and 0.51% respectively) is very low compared to the Alberta average (7%) which reflects the limited availability of public transit in the region. Of those aged 15 and older who commute to work, 45.28% of those in the PTA and 49.73% of the STA commute less than 15 minutes. Compared to the Alberta average (26.95%), the PTA value is high and the STA value is very high. Notably, commuting durations between 30-44 minutes in the PTA and 15-59 minutes in the STA are very low compared to the Alberta benchmarks.

Referring to **Table 4-7,** prominent industries within the PTA include Mining, Quarrying and Oil and Gas Extraction (13.39% & 10,162 employees), and Retail Trade (12.64% & 9,598 employees). In contrast, prominent industries within the STA include Health Care and Social Assistance (14.20% & 3,608 employees) and Retail Trade (13.05% & 3,315 employees). By occupation, a significant portion of the PTA's labour force is employed in Sales and Service Occupations (19.84% & 15,059 employees) and Trade, Transport and Equipment Operators and Related Occupations (19.23% & 14,594 employees). A very high percentage (6.20%) is also employed in Natural Resources, Agriculture and Related Production Occupations compared to the Alberta benchmark (2.94%). The STA is similar to the PTA in that Sales and Service Occupations (20.31% & 5,161 employees) and Trade, Transport and Equipment Operators and Related Occupations (16.39% & 4,164 employees) dominate.

Table 4-6. Labour Force Summary

(Source: FBM and Manifold Data Mining Inc.)

Attribute	Benchmark - Alberta		Saskatchewan			Lloydminster PTA			Lloydminster STA		
	value	percent	value	percent	index	value	percent	index	value	percent	index
LABOUR FORCE ACTIVITY - TOTAL											
Total population 15+ years	3,751,240		978,835			107,857			41,258		
In the labour force	2,608,040	69.53%	659,317	67.36%	97	75,914	70.38%	101	25,403	61.57%	89
Unemployed	288,873	7.70%	45,660	4.67%	61	8,521	7.90%	103	2,595	6.29%	82
Employed	2,319,170	61.82%	613,657	62.69%	101	67,393	62.48%	101	22,808	55.28%	89
Not in the labour force	1,143,190	30.48%	319,518	32.64%	107	31,943	29.62%	97	15,855	38.43%	126
Participation rate (%)		69.52%		67.36%	97		70.38%	101		61.57%	89
Employment rate (%)		61.82%		62.69%	101		62.48%	101		55.28%	89
Unemployment rate (%)		11.08%		6.93%	63		11.22%	101		10.22%	92
PLACE OF WORK											
Total employed labour force 15 years and over by place of work status	2,319,170		613,657			67,393			22,808		
At home	446,841	17.13%	132,669	20.12%	117	12,608	16.61%	97	4,644	18.28%	107
Outside Canada	7,904	0.30%	1,172	0.18%	60	158	0.21%	70	37	0.15%	50
No fixed workplace address	297,501	11.41%	68,355	10.37%	91	10,138	13.35%	117	2,660	10.47%	92
Usual place of work	1,566,920	60.08%	411,463	62.41%	104	44,488	58.60%	98	15,467	60.89%	101
COMMUTING DURATION											
Total employed population aged 15 years and over who commute to work	1,809,870		465,295			53,000			17,583		
Less than 15 minutes	702,834	26.95%	261,450	39.66%	147	34,376	45.28%	168	12,632	49.73%	185
15 to 29 minutes	576,468	22.10%	131,972	20.02%	91	9,470	12.47%	56	2,770	10.90%	49
30 to 44 minutes	313,629	12.03%	40,049	6.07%	50	4,257	5.61%	47	989	3.89%	32
45 to 59 minutes	135,142	5.18%	18,088	2.74%	53	2,715	3.58%	69	597	2.35%	45
60 minutes and over	81,797	3.14%	13,736	2.08%	66	2,182	2.87%	91	595	2.34%	75
MODE OF TRANSPORTATION											
Total employed labour force 15 years and over who commute to work by mode of transportation	1,809,870		465,295			53,000			17,583		
Car, truck, van, as driver	1,396,860	53.56%	383,575	58.18%	109	44,023	57.99%	108	14,423	56.78%	106
Car, truck, van, as passenger	95,456	3.66%	27,560	4.18%	114	3,549	4.68%	128	1,085	4.27%	117
Public transit	182,427	7.00%	13,835	2.10%	30	444	0.58%	8	129	0.51%	7
Walked	82,291	3.16%	26,634	4.04%	128	3,827	5.04%	159	1,470	5.79%	183
Bicycle	22,482	0.86%	5,681	0.86%	100	391	0.52%	60	217	0.86%	100
Other method	30,354	1.16%	8,011	1.22%	105	766	1.01%	87	258	1.02%	88

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

Table 4-7. Labour Force Industry and Occupation

(Source: FBM and Manifold Data Mining Inc.)

Attribute	Benchmark - Alberta		Saskatchewan			Lloydminster PTA			Lloydminster STA		
	value	percent	value	percent	index	value	percent	index	value	percent	index
LABOUR FORCE INDUSTRY											
Total labour force population aged 15+ years - North American Industry Classification System (NAICS) 2017	2,608,040		659,318			75,914			25,403		
Industry - not applicable	73,910	2.83%	15,372	2.33%	82	1,753	2.31%	82	1,033	4.07%	144
All industries	2,534,130	97.17%	643,946	97.67%	101	74,161	97.69%	101	24,370	95.93%	99
11 Agriculture, forestry, fishing, and hunting	71,746	2.75%	56,385	8.55%	311	3,585	4.72%	172	1,642	6.47%	235
21 Mining, quarrying, and oil and gas extraction	158,624	6.08%	26,370	4.00%	66	10,162	13.39%	220	793	3.12%	51
22 Utilities	29,738	1.14%	7,474	1.13%	99	463	0.61%	54	510	2.01%	176
23 Construction	251,586	9.65%	52,310	7.93%	82	6,629	8.73%	90	1,502	5.91%	61
31-33 Manufacturing	143,332	5.50%	30,379	4.61%	84	2,259	2.98%	54	1,054	4.15%	75
41 Wholesale trade	95,485	3.66%	24,076	3.65%	100	1,873	2.47%	67	797	3.14%	86
44-45 Retail trade	280,556	10.76%	69,927	10.61%	99	9,598	12.64%	117	3,315	13.05%	121
48-49 Transportation and warehousing	123,527	4.74%	26,592	4.03%	85	3,102	4.09%	86	1,137	4.48%	95
51 Information and cultural industries	36,539	1.40%	11,264	1.71%	122	741	0.98%	70	327	1.29%	92
52 Finance and insurance	88,093	3.38%	25,631	3.89%	115	2,005	2.64%	78	783	3.08%	91
53 Real estate and rental and leasing	54,251	2.08%	10,617	1.61%	77	1,350	1.78%	86	302	1.19%	57
54 Professional, scientific, and technical services	200,610	7.69%	30,928	4.69%	61	3,398	4.48%	58	850	3.35%	44
55 Management of companies and enterprises	7,683	0.30%	1,881	0.29%	97	130	0.17%	57	21	0.08%	27
56 Administrative and support, waste management and remediation services	94,609	3.63%	18,520	2.81%	77	2,297	3.03%	83	873	3.44%	95
61 Educational services	173,188	6.64%	53,128	8.06%	121	4,691	6.18%	93	2,538	9.99%	150
62 Health care and social assistance	279,772	10.73%	81,216	12.32%	115	6,742	8.88%	83	3,608	14.20%	132
71 Arts, entertainment, and recreation	48,992	1.88%	11,473	1.74%	93	1,086	1.43%	76	770	3.03%	161
72 Accommodation and food services	141,660	5.43%	34,483	5.23%	96	4,252	5.60%	103	1,256	4.94%	91
81 Other services (except public administration)	112,900	4.33%	27,546	4.18%	97	3,155	4.16%	96	678	2.67%	62
91 Public administration	141,239	5.42%	43,748	6.64%	123	6,643	8.75%	161	1,614	6.35%	117
OCCUPATION											
Total labour force 15 years and over by occupation	2,608,040		659,318			75,914			25,403		
0 Management occupations	305,077	11.70%	94,350	14.31%	122	8,912	11.74%	100	3,135	12.34%	105
1 Business, finance, and administration occupations	415,573	15.93%	94,261	14.30%	90	10,307	13.58%	85	2,708	10.66%	67
2 Natural and applied sciences and related occupations	214,806	8.24%	35,633	5.41%	66	3,689	4.86%	59	821	3.23%	39
3 Health occupations	178,012	6.83%	49,535	7.51%	110	4,218	5.56%	81	2,463	9.69%	142
4 Occupations in education, law and social, community and government services	278,222	10.67%	78,658	11.93%	112	8,409	11.08%	104	3,333	13.12%	123
5 Occupations in art, culture, recreation, and sport	53,043	2.03%	12,179	1.85%	91	1,092	1.44%	71	500	1.97%	97
6 Sales and service occupations	502,000	19.25%	125,927	19.10%	99	15,059	19.84%	103	5,161	20.31%	106
7 Trades, transport and equipment operators and related occupations	432,507	16.58%	105,742	16.04%	97	14,594	19.23%	116	4,164	16.39%	99
8 Natural resources, agriculture, and related production occupations	76,757	2.94%	29,602	4.49%	153	4,708	6.20%	211	1,131	4.45%	151
9 Occupations in manufacturing and utilities	78,134	3.00%	18,059	2.74%	91	3,172	4.18%	139	955	3.76%	125
Occupation - not applicable	73,910	2.83%	15,372	2.33%	82	1,753	2.31%	82	1,033	4.07%	144

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

4.4 Retail Spending Profile

Having established the respective Trade Area boundaries, population, and demographic profile, the size of the retail market and its anticipated growth was projected using retail spending data from Manifold Data Mining using 2021 year end data. The task involved developing an understanding of how the Trade Area residents spend their shopping and leisure dollars on a household basis for each of the 22 categories as shown in **Table 4-8**.

Table 4-8, Table 4-9 and Table 4-10 establish a spending profile for Lloydminster's Primary and Secondary Trade Areas which has been indexed against the Alberta and Saskatchewan averages for the same. Additional miscellaneous inflow is also presented in **Table 4-11**.

4.5.1 Primary Trade Area

The majority (74%) of Lloydminster's overall retail spending is attributed to Lloydminster's PTA (**Figure 4-8**). Total aggregate retail spending for 2021 was $1.6 billion excluding health care and auto. Grocery, Convenience and Specialty Foods represent the highest household spending category at $8,828 which represents 29% of the spending potential (**Table 4-8**). Household spending on Auto/RV/Motorsports Dealership was the second highest spending category ($6,038). Amongst the four major merchandise categories shown in **Figure 4-9**, Grocery and Conveniences account for 42% of the total non-auto spending potential, while Comparison or DSTM accounts for 45%.

Total PTA spending is expected to increase to $1.8 billion by 2026 and $2 billion by 2031.

4.5.2 Secondary Trade Area

Lloydminster's STA represents 24% of the overall retail spending (**Figure 4-8**). Total aggregate retail spending for 2021 was $533.6 million excluding health care and auto. Similar to the PTA, household spending amongst STA residents was highest among the categories of Grocery, Convenience and Specialty Foods ($7,375) and Auto/RV/Motorsports Dealership ($5,089). As of 2021, spending in the broad merchandise categories of Grocery and Conveniences and Comparison Merchandise are comparable at $226 and $229 million respectively.

Total STA spending is expected to increase to $583 million by 2026 and $626.6 million by 2031.

Figure 4-8. Trade Area Spending 2021 Distribution

(Source: FBM and Manifold Data Mining Inc.)

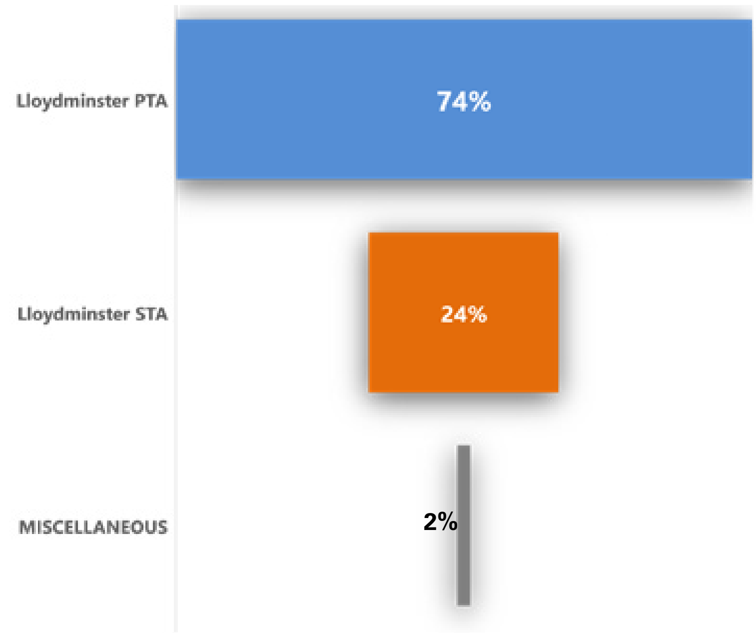


Figure 4-9. Trade Area Spending 2021 by Broad Merchandise Category

(Source: FBM and Manifold Data Mining Inc.)

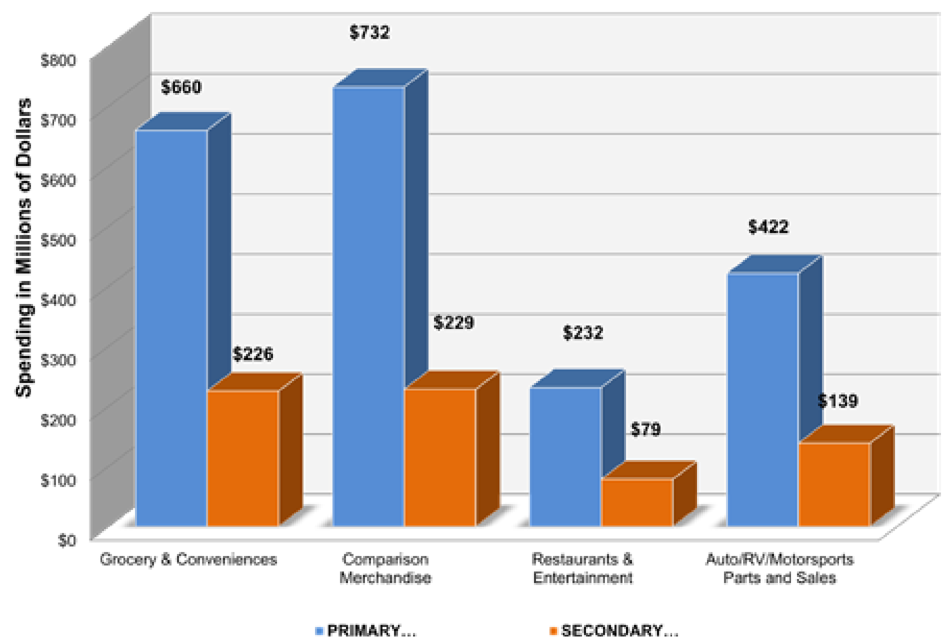


Table 4-8. Trade Area Spending **2021** per Detailed Merchandise Category

(Source: FBM and Manifold Data Mining Inc.)

	Retail Spending by Merchandise Category	2021 PRIMARY TRADE AREA Per Household Retail Spending	2021 PRIMARY TRADE AREA Aggregate Retail Spending	2021 SECONDARY TRADE AREA Per Household Retail Spending	2021 SECONDARY TRADE AREA Aggregate Retail Spending	2021 TOTAL TRADE AREA Per Household Retail Spending	2021 TOTAL TRADE AREA Aggregate Retail Spending
Convenience & Day-to-Day Goods/Services	Grocery, Convenience & Specialty Foods	$8,828	$452,549,445	$7,375	$151,767,195	$8,412	$604,316,640
	Pharmacy	$811	$41,577,470	$926	$19,065,433	$844	$60,642,903
	Alcohol, Tobacco & Cannabis	$1,830	$93,804,185	$1,573	$32,372,349	$1,756	$126,176,534
	Personal & Home Services	$1,405	$72,010,961	$1,097	$22,576,140	$1,317	$94,587,101
	Health Care & Medical Services	$1,230	$63,035,256	$1,050	$21,602,099	$1,178	$84,637,356
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Footwear	$2,209	$113,223,548	$1,584	$32,595,859	$2,030	$145,819,407
	Jewelry & Accessories	$331	$16,990,739	$234	$4,820,440	$304	$21,811,178
	Beauty & Personal Care	$931	$47,747,477	$700	$14,401,760	$865	$62,149,238
	Furniture & Décor	$1,149	$58,892,227	$827	$17,007,905	$1,057	$75,900,132
	Appliances & Electronics	$1,806	$92,588,466	$1,512	$31,106,728	$1,722	$123,695,193
	Home Improvement & Gardening	$3,080	$157,892,778	$2,803	$57,673,948	$3,001	$215,566,726
	Books, Media & Computers	$3,178	$162,885,938	$2,195	$45,161,825	$2,896	$208,047,763
	Sporting Goods	$411	$21,068,287	$256	$5,260,043	$366	$26,328,331
	Toys & Hobbies	$314	$16,070,878	$249	$5,121,599	$295	$21,192,477
	Specialty Retail	$875	$44,854,697	$762	$15,690,410	$843	$60,545,107
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	$1,988	$101,886,198	$1,648	$33,909,478	$1,890	$135,795,676
	Restaurants & Pubs	$2,043	$104,752,718	$1,816	$37,371,521	$1,978	$142,124,239
	Arts & Entertainment	$149	$7,642,739	$121	$2,481,137	$141	$10,123,876
	Fitness & Leisure	$339	$17,381,714	$253	$5,203,682	$314	$22,585,396
Automotive Goods (excluding repair)	Auto Parts & Accessories	$2,194	$112,479,849	$1,667	$34,294,040	$2,043	$146,773,889
	Auto/RV/Motorsports Dealership	$6,038	$309,534,822	$5,089	$104,717,326	$5,766	$414,252,148
	Auto Fuel	$2,001	$102,588,590	$1,606	$33,043,947	$1,888	$135,632,537
	TOTAL CATEGORIES	**$43,140**	**$2,211,458,984**	**$35,341**	**$727,244,863**	**$39,018**	**2,803,071,310**
	TOTAL (excluding Health Care & Auto)	**$31,677**	**$1,623,820,466**	**$25,930**	**$533,587,451**	**$29,321**	**2,106,412,736**

Table 4-9. Trade Area Spending **2026** per Detailed Merchandise Category

(Source: FBM and Manifold Data Mining Inc.)

Retail Spending by Merchandise Category		2026 PRIMARY TRADE AREA Per Household Retail Spending	2026 PRIMARY TRADE AREA Aggregate Retail Spending	2026 SECONDARY TRADE AREA Per Household Retail Spending	2026 SECONDARY TRADE AREA Aggregate Retail Spending	2026 TOTAL Trade Areas Average Household Retail Spending	2026 TOTAL TRADE AREA Retail Spending
Convenience & Day-to-Day Goods/Services	Grocery, Convenience & Specialty Foods	$9,278	$507,199,442	$7,751	$165,834,011	$8,849	$673,033,453
	Pharmacy	$852	$46,598,377	$974	$20,832,547	$887	$67,430,924
	Alcohol, Tobacco & Cannabis	$1,923	$105,132,005	$1,653	$35,372,838	$1,847	$140,504,843
	Personal & Home Services	$1,476	$80,707,025	$1,153	$24,668,651	$1,385	$105,375,675
	Health Care & Medical Services	$1,292	$70,647,411	$1,103	$23,604,329	$1,239	$94,251,740
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Footwear	$2,321	$126,896,455	$1,665	$35,617,065	$2,137	$162,513,521
	Jewelry & Accessories	$348	$19,042,545	$246	$5,267,231	$320	$24,309,776
	Beauty & Personal Care	$979	$53,513,476	$736	$15,736,613	$910	$69,250,089
	Furniture & Décor	$1,207	$66,004,068	$869	$18,584,313	$1,112	$84,588,382
	Appliances & Electronics	$1,898	$103,769,475	$1,589	$33,989,911	$1,811	$137,759,385
	Home Improvement & Gardening	$3,237	$176,959,954	$2,946	$63,019,562	$3,155	$239,979,516
	Books, Media & Computers	$3,340	$182,556,090	$2,307	$49,347,730	$3,049	$231,903,820
	Sporting Goods	$432	$23,612,500	$269	$5,747,580	$386	$29,360,080
	Toys & Hobbies	$329	$18,011,602	$262	$5,596,303	$310	$23,607,905
	Specialty Retail	$920	$50,271,363	$801	$17,144,704	$886	$67,416,067
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	$2,089	$114,190,004	$1,732	$37,052,439	$1,989	$151,242,443
	Restaurants & Pubs	$2,148	$117,402,685	$1,909	$40,835,367	$2,080	$158,238,053
	Arts & Entertainment	$157	$8,565,678	$127	$2,711,105	$148	$11,276,783
	Fitness & Leisure	$356	$19,480,735	$266	$5,685,995	$331	$25,166,730
Automotive Goods (excluding repair)	Auto Parts & Accessories	$2,306	$126,062,947	$1,752	$37,472,644	$2,150	$163,535,592
	Auto/RV/Motorsports Dealership	$6,346	$346,914,333	$5,348	$114,423,240	$6,066	$461,337,574
	Auto Fuel	$2,103	$114,977,217	$1,688	$36,106,684	$1,986	$151,083,901
	TOTAL CATEGORIES	**$45,341**	**$2,478,515,386**	**$37,144**	**$794,650,864**	**$43,035**	**$3,273,166,250**
	TOTAL (excluding Auto)	**$33,293**	**$1,819,913,477**	**$27,253**	**$583,043,966**	**$31,594**	**$2,402,957,443**

Table 4-10. Trade Area Spending **2031** per Detailed Merchandise Category

(Source: FBM and Manifold Data Mining Inc.)

Retail Spending by Merchandise Category		2031 PRIMARY TRADE AREA Per Household Retail Spending	2031 PRIMARY TRADE AREA Aggregate Retail Spending	2031 SECONDARY TRADE AREA Per Household Retail Spending	2031 SECONDARY TRADE AREA Aggregate Retail Spending	2031 TOTAL Trade Areas Average Household Retail Spending	2031 TOTAL TRADE AREA Retail Spending
Convenience & Day-to-Day Goods/Services	Grocery, Convenience & Specialty Foods	$9,752	$553,579,720	$8,147	$178,228,129	$9,305	$731,807,850
	Pharmacy	$896	$50,859,513	$1,023	$22,389,532	$931	$73,249,044
	Alcohol, Tobacco & Cannabis	$2,021	$114,745,682	$1,738	$38,016,537	$1,942	$152,762,218
	Personal & Home Services	$1,552	$88,087,187	$1,212	$26,512,339	$1,457	$114,599,525
	Health Care & Medical Services	$1,358	$77,107,684	$1,160	$25,368,471	$1,303	$102,476,155
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Footwear	$2,440	$138,500,358	$1,750	$38,279,017	$2,248	$176,779,375
	Jewelry & Accessories	$366	$20,783,869	$259	$5,660,894	$336	$26,444,763
	Beauty & Personal Care	$1,029	$58,406,955	$773	$16,912,738	$958	$75,319,693
	Furniture & Décor	$1,269	$72,039,736	$913	$19,973,270	$1,170	$92,013,005
	Appliances & Electronics	$1,995	$113,258,557	$1,670	$36,530,252	$1,905	$149,788,809
	Home Improvement & Gardening	$3,402	$193,141,856	$3,096	$67,729,524	$3,317	$260,871,381
	Books, Media & Computers	$3,510	$199,249,724	$2,424	$53,035,886	$3,208	$252,285,610
	Sporting Goods	$454	$25,771,718	$282	$6,177,143	$406	$31,948,861
	Toys & Hobbies	$346	$19,658,652	$275	$6,014,560	$326	$25,673,213
	Specialty Retail	$967	$54,868,370	$842	$18,426,067	$932	$73,294,437
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	$2,196	$124,631,979	$1,820	$39,821,668	$2,091	$164,453,647
	Restaurants & Pubs	$2,257	$128,138,441	$2,006	$43,887,325	$2,187	$172,025,766
	Arts & Entertainment	$165	$9,348,957	$133	$2,913,728	$156	$12,262,685
	Fitness & Leisure	$375	$21,262,128	$279	$6,110,955	$348	$27,373,084
Automotive Goods (excluding repair)	Auto Parts & Accessories	$2,424	$137,590,631	$1,841	$40,273,279	$2,262	$177,863,909
	Auto/RV/Motorsports Dealership	$6,670	$378,637,521	$5,621	$122,975,016	$6,378	$501,612,537
	Auto Fuel	$2,211	$125,491,178	$1,774	$38,805,229	$2,089	$164,296,407
	TOTAL CATEGORIES	**$47,654**	**$2,705,160,416**	**$39,038**	**$854,041,558**	**$45,257**	**$3,559,201,973**
	TOTAL (excluding Auto)	**$34,991**	**$1,986,333,402**	**$28,643**	**$626,619,563**	**$33,225**	**$2,612,952,965**

4.5.3 Miscellaneous Inflow

Miscellaneous retail spending accounts for a small percentage (2%) of overall Primary Trade Area retail spending and represents visitors, motorists, students and transient workers who may visit Lloydminster for short periods of time.

Given that the needs of non-residents differ from those of residents, a inflow factor has been applied to each merchandise category to project the total miscellaneous spending (**Table 4-11**).

Categories where spending is highest amongst non-visitors are primary food and travel oriented including Grocery, Convenience and Specialty Foods, Quick Service F&B, Restaurants and Pubs, and Auto Parts and Accessories. Total retail miscellaneous inflow spending for 2021 was $44.9 million, increasing to $62.4 million by 2026 and $67.9 million by 2031.

Table 4-11. Miscellaneous Retail Spending 2021, 2026, and 2031

(Source: FBM and Manifold Data Mining Inc.)

			2021	2026	2031
	Misc Inflow Factor	Retail Spending by Merchandise Category	LLOYDMINSTER Misc Inflow Spending	LLOYDMINSTER Misc Inflow Spending	LLOYDMINSTER Misc Inflow Spending
Convenience & Day-to-Day Goods/Services	5.0%	Grocery, Convenience & Specialty Foods	$25,359,972	$33,651,673	$36,590,392
	1.0%	Pharmacy	$465,984	$674,309	$732,490
	1.0%	Alcohol, Tobacco & Cannabis	$1,051,320	$1,405,048	$1,527,622
	1.0%	Personal & Home Services	$807,070	$1,053,757	$1,145,995
	0.0%	Health Care & Medical Services	$0	$0	$0
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	2.0%	Fashion & Footwear	$2,264,471	$3,250,270	$3,535,587
	1.0%	Jewelry & Accessories	$169,907	$243,098	$264,448
	1.0%	Beauty & Personal Care	$477,475	$692,501	$753,197
	1.0%	Furniture & Décor	$588,922	$845,884	$920,130
	0.0%	Appliances & Electronics	$0	$0	$0
	1.0%	Home Improvement & Gardening	$1,578,928	$2,399,795	$2,608,714
	0.5%	Books, Media & Computers	$814,430	$1,159,519	$1,261,428
	0.5%	Sporting Goods	$105,341	$146,800	$159,744
	0.0%	Toys & Hobbies	$0	$0	$0
	2.0%	Specialty Retail	$897,094	$1,348,321	$1,465,889
Leisure, Recreation & Entertainment Goods/Services	5.0%	Quick Service F&B	$5,094,310	$7,562,122	$8,222,682
	5.0%	Restaurants & Pubs	$5,237,636	$7,911,903	$8,601,288
	1.0%	Arts & Entertainment	$76,427	$112,768	$122,627
	0.0%	Fitness & Leisure	$0	$0	$0
Automotive Goods (excluding repair)	2.5%	Auto Parts & Accessories	$2,811,996	$4,088,390	$4,446,598
	0.0%	Auto/RV/Motorsports Dealership	$0	$0	$0
	0.0%	Auto Fuel	$0	$0	$0
	2.2%	**TOTAL RETAIL CATEGORIES ONLY**	**$47,801,284**	**$66,546,158**	**$72,358,833**
	2.8%	**TOTAL (excluding Auto)**	**$44,989,288**	**$62,457,769**	**$67,912,235**

5.0 Nodal Profiles

5.1 Introduction

Retail and commercial activity in Lloydminster primarily takes place in eight (8) retail nodes (see **Figure 5-1**), seven of which are true defined nodes located along the two intersecting highways (Highways 16 and 17) and one of which represents three separate and much smaller neighborhood-scale commercial nodes referred to as Neighbourhood Nodes. The consultant team identified the nodes using the commercial zone designation from the Municipal Development Plan's Land Use Concept Map, fieldwork observations, and the City-provided GIS data.

Table 5-1 to Table 5-4 and Figure 5-1 to Figure 5-4 summarize the findings from the master business inventory analysis for all eight nodes combined. To create the business inventory, the team used the collected on-the-ground fieldwork from May 2022, the City's active business licenses, city-provided building footprint GIS data, and Google to confirm active businesses. Note that the inventory is ground floor only and does not include home-based businesses.

Lloydminster has a total of about **2.6 million sf of retail-specific floorspace** and almost 4.48 million sf of total floorspace including office uses and vacant spaces (see **Table 5-1**). Of the retail businesses, just over a quarter are local businesses (26%) while about three quarters (74%) are larger retail brands (**Table 5-3**). The average size of branded stores is almost double the average size of local stores (8,268 sf branded versus 3,462 sf local) across all nodes. Retail Trade (266) and Accommodations and Food Services (102) are the dominant NAICS codes in the City by number of businesses (**Table 5-2 and Figure 5-2**)

The overall city average retail sales productivity is relatively healthy at an estimated average of $333 per sf. For a community of Lloydminster's size and large retail offering ,a retail sales productivity in greater than $300 per sf is considered strong. In looking at each node, it will be observed which nodes are estimated to be performing at, above or below this overall citywide average. This productivity level is despite higher than average vacancies in the market, which suggests that Lloydminster should carefully manage expectations for any new large scale development or retail expansion.

Table 5-1. City-Wide Retail Inventory Summary
(Source: FBM)

MERCHANDISE CATEGORY	TOTAL FLOORSPACE (sq. ft.)	TOTAL MIX (%)
PROFESSIONAL, MEDICAL & FINANCIAL	728,531	16.3%
HOME IMPROVEMENT & GARDENING	371,385	8.3%
VACANT	351,388	7.8%
GROCERY, CONVENIENCE & SPECIALTY FOODS	337,828	7.5%
FASHION & FOOTWEAR	261,267	5.8%
AUTO SERVICE	251,212	5.6%
AUTO/RV/MOTORSPORTS DEALERSHIP	175,846	3.9%
SPECIALTY RETAIL	159,390	3.6%
QUICK SERVICE F&B	151,661	3.4%
FULL SERVICE RESTAURANTS & PUBS	143,752	3.2%
HOME FURNITURE & DÉCOR	141,109	3.1%
AUTO PARTS & ACCESSORIES	132,842	3.0%
ALCOHOL, TOBACCO & CANNABIS	93,720	2.1%
PERSONAL SERVICE	93,719	2.1%
BEAUTY & WELLNESS	91,144	2.0%
ELECTRONICS & APPLIANCES	88,919	2.0%
ARTS & ENTERTAINMENT	87,036	1.9%
FITNESS & LEISURE	82,877	1.9%
SPORTING GOODS & OUTDOOR RECREATION	81,367	1.8%
TOYS & HOBBIES	59,460	1.3%
PHARMACY	41,995	0.9%
JEWELRY & ACCESSORIES	19,034	0.4%
BOOKS, MEDIA & COMPUTERS	10,280	0.2%
TOTAL	**4,479,703**	**100.0%**
Retail Floorspace Excluding Non-Retail (Professional/Medical/Tourism/Light Industrial/Auto Service/VACANT)	**2,624,632**	**59%**
Total Estimated Retail Sales Excluding Non-Retail (Professional/Medical/Tourism/Light Industrial/Auto Service/VACANT)	**$872,866,002**	
Estimated Retail Sales Productivity ($/sf)	**$333**	

Current vacancy overall for Lloydminster sits at 7.8% which is higher than the industry standard which should be in the range of 3% to 5%. This higher than average vacancy includes the former notable spaces or nodes:

- Canadian Tire - 65,972 sf (of note is that Canadian Tire is relocating into a larger brand new building, so this space could be subdivided for smaller junior box retailers or a possible single user)
- Lloyd Place Mall 45,208 sf
- Downtown - 58,957 sf

Vacancies represent a present day challenge for Lloydminster suggesting that future demand and targeted retailers should be presented with opportunities to backfill current vacancies where possible before looking at new building or development. With a trend for larger retailers downsizing their existing formats, it is even more important to leverage the current vacancies to try and find compatible locations for retailers.

With respect to the overall citywide retail mix, the top 5 retail-specific merchandise categories include the following:

1.	Home Improvement & Gardening	371,385 sf
2.	Grocery, Convenience & Specialty Foods	337,827 sf
3.	Fashion & Footwear	261,267 sf
4.	Auto/RV/Motorsports	175,846 sf
5.	Specialty Retail	159,390 sf

Although there are some dominant categories, Lloydminster is unique among a lot of other comparably sized cities, in that it has a quite wide and strong representation across almost all merchandise categories, which is testament to the strong regional draw that Lloydminster has established.

The nodal distribution of ground-oriented businesses (**Figure 5-4**) shows that Professional, Medical & Financial businesses that account for over 700,000 sf of space have a relatively balanced distribution across Lloydminster's nodes, with Downtown having the largest share of square footage.

Conversely, the largest share of Full Service Restaurants & Pubs square footage is split almost equally between the Lloyd Mall and Power Centres nodes. Overall, **Figure 5-4** reveals that dominance that the Power Centres node has in terms of accommodating retail/business floorspace.

This balance is part of Lloydminster's appeal as a regional market. Even categories like Home Furniture and Decor, Sporting Goods and Outdoor Recreation and Beauty & Wellness have a healthy square footage allocation.

Table 5-3 illustrates moreover that Lloydminster is a market where brands take precedence over local retailers in terms of the number of businesses and floorspace. This occurrence is a large reason why retail in the Downtown has struggled to keep pace with Lloydminster's regional growth, which is dominated by brands.

On the following pages, each node is profiled individually in terms of their respective retail market metrics including inventory, vacancy, and business mix/count.

Figure 5-1.
Lloydminster's Retail Nodes
(Source: FBM)

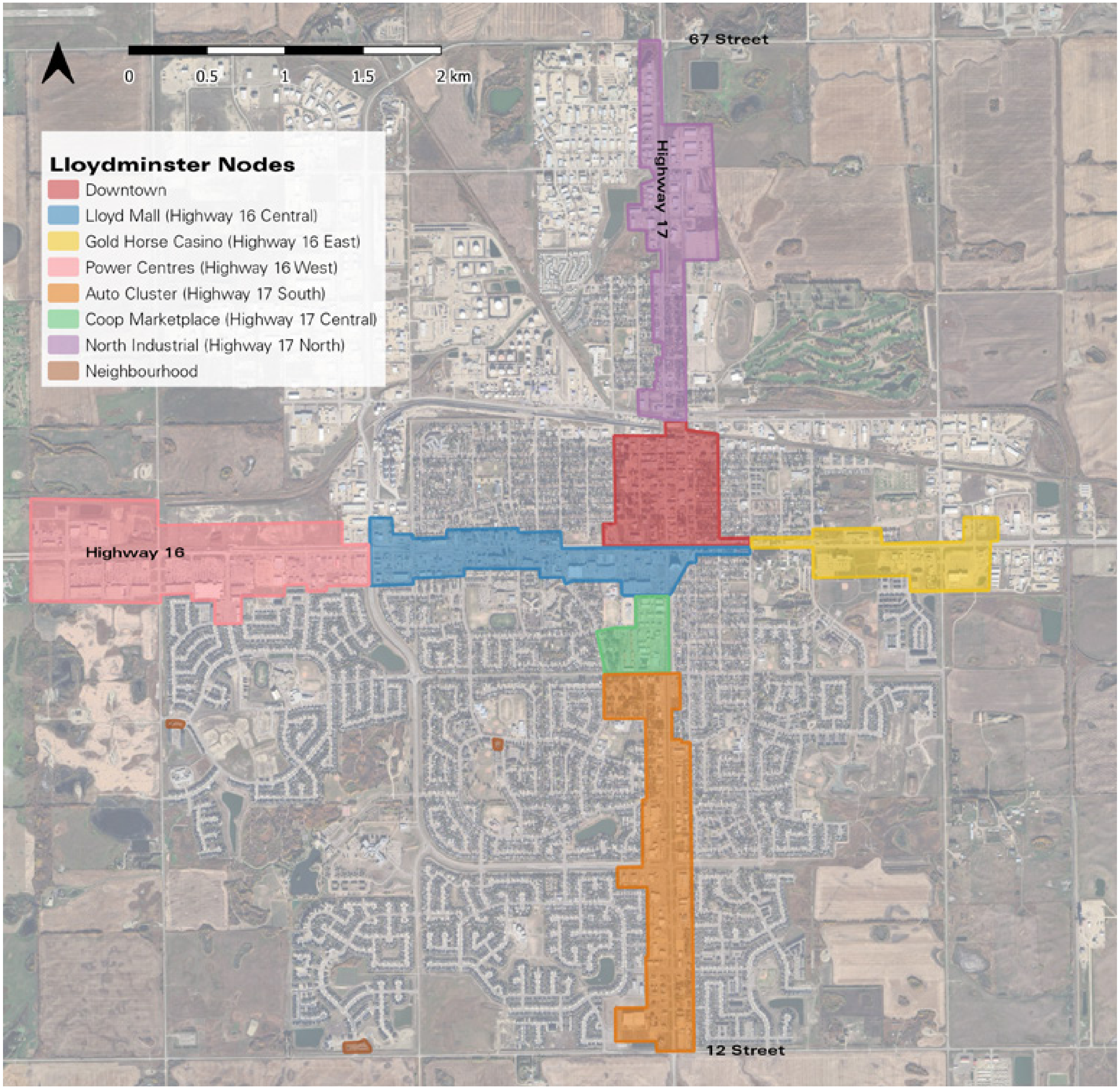


Table 5-2. City-Wide NAICS Summary by Node
(Source: FBM)

NAICS Code	TOTAL	AUTO CLUSTER	GOLD HORSE CASINO	NORTH INDUSTRIAL	DOWNTOWN	COOP MARKETPLACE	POWER CENTRES	LLOYD MALL	NEIGHBOURHOOD COMMERCIAL
Agriculture, Forestry, Fishing and Hunting	0	0	0	0	0	0	0	0	0
Mining, Quarrying, and Oil and Gas Extraction	2	0	0	0	2	0	0	0	0
Utilities	0	0	0	0	0	0	0	0	0
Construction	6	2	0	2	0	1	0	1	0
Manufacturing	9	1	0	0	3	0	3	2	0
Wholesale Trade	7	3	1	2	0	0	0	1	0
Retail Trade	266	42	11	14	44	22	57	70	6
Transportation and Warehousing	3	0	1	0	2	0	0	0	0
Information and Cultural Industries	10	1	0	1	3	1	2	2	0
Finance and Insurance	38	4	1	1	13	7	6	6	0
Real Estate and Rental and Leasing	9	4	0	0	2	2	0	1	0
Professional, Scientific and Technical Services	42	19	0	2	12	1	3	5	0
Management of Companies and Enterprises	0	0	0	0	0	0	0	0	0
Administrative and Support, Waste Management and Remediation Services	4	0	0	0	3	0	0	1	0
Educational Services	8	3	0	2	3	0	0	0	0
Health Care and Social Assistance	58	9	0	1	23	11	7	6	1
Arts, Entertainment and Recreation	12	3	2	1	1	2	1	2	0
Accommodation and Food Services	102	14	3	4	12	10	27	31	1
Other Services (Except Public Administration)	91	18	5	7	23	8	9	19	2
Public Administration	0	0	0	0	0	0	0	0	0
Total Number of Businesses (inc. non-retail)	667	123	24	37	146	65	115	147	10

Figure 5-2. City-Wide NAICS Distribution by Total Number of Businesses
(Source: FBM)

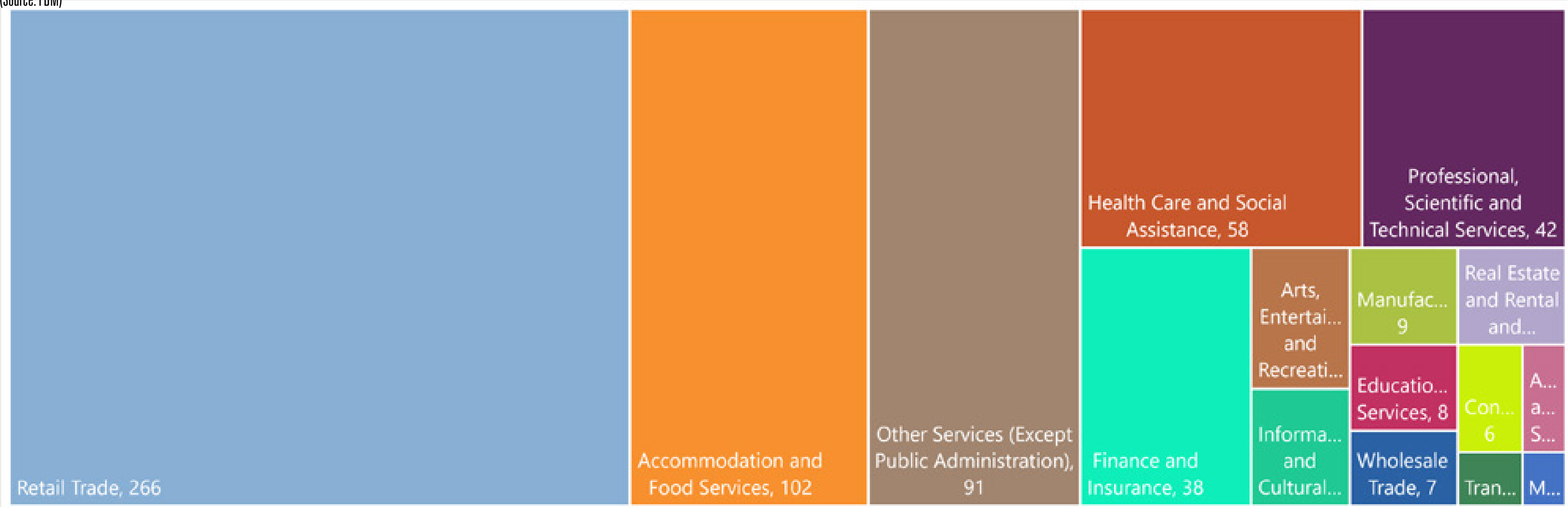


Table 5-3. City-Wide Local versus Brand Retail Summary
(Source: FBM)

Retail Mix Local vs Branded		
Business Count	Local	193 businesses
	Brand	229 businesses
	Total	**422 businesses**
	Local	46%
	Brand	54%
Floorspace	Local	668,167 sq. ft.
	Brand	1,893,372 sq. ft.
	Total	**2,561,539 sq. ft.**
	Local	26%
	Brand	74%
	Avg Local Size	3,462 sq. ft.
	Avg Branded Size	8,268 sq. ft.
	Avg Total Size	**6,070 sq. ft.**

Table 5-4. City-Wide Retail Sales Inventory Productivity Summary
(Source: FBM)

Retail Node	Est Total Retail Sales	Estimated Retail Inventory (sf)	Est Sales Productivity (per sf)
Auto Cluster	$126,347,949	428,700	$295
Gold Horse Casino	$28,311,631	96,308	$294
North Industrial	$19,517,264	77,991	$250
Downtown	$64,592,340	280,819	$230
COOP Marketplace	$70,087,077	203,417	$345
Power Centres	$368,417,959	978,210	$377
Lloyd Mall	$189,801,528	540,057	$351
N'hood Commercial	$5,790,254	19,131	$303
TOTAL	**$872,866,002**	**2,624,632**	**$333**

Figure 5-3. City-Wide Local versus Brand Retail Summary by Number of Businesses
(Source: FBM)

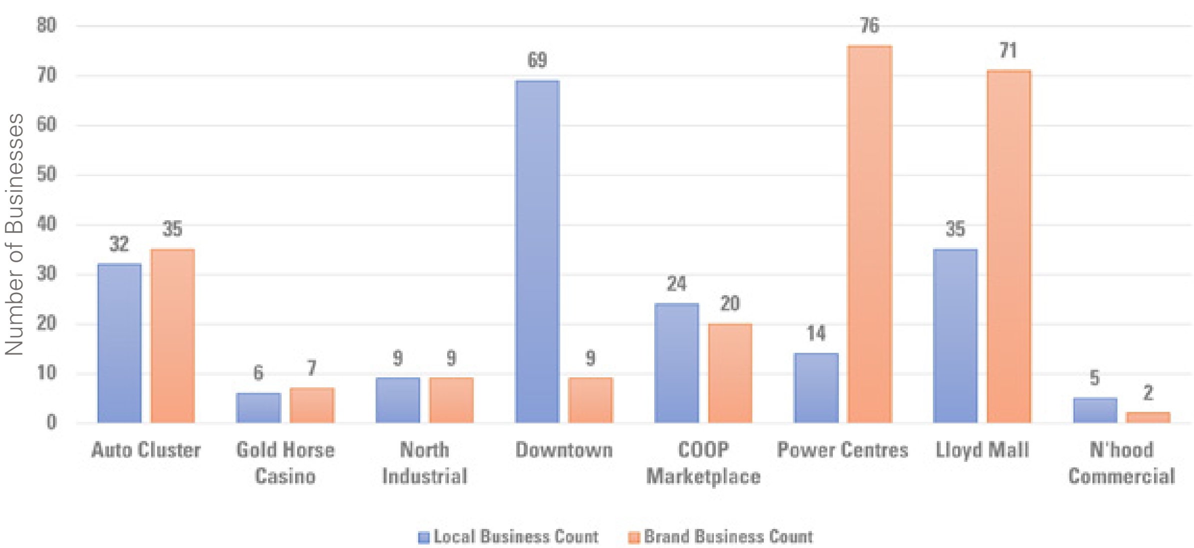
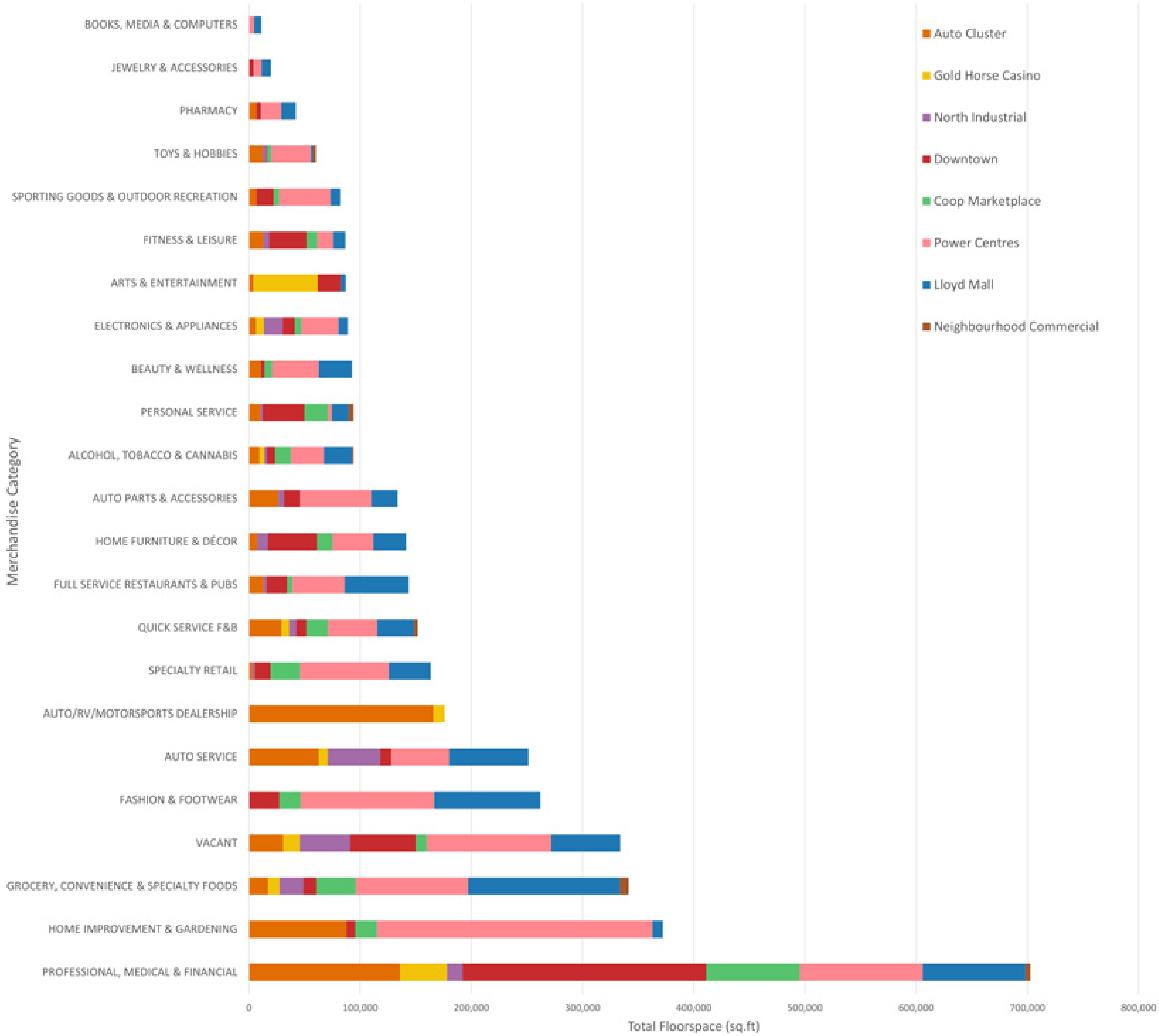


Figure 5-4. City-Wide Inventory Summary by Total Floorspace (sf)
(Source: FBM)



5.2 North Industrial Node

The North Industrial Node was so named for the primary use in the area, industrial, shown in grey in **Figure 5-5.** The node is included in the inventory because there are several retail businesses located along Highway 17 which appear to extend from the Downtown Node to the south. As shown in **Figure 5-5 and Table 5-6,** auto service takes up the most floorspace amongst the businesses (47,259 sf) followed closely by vacant spaces with retail potential (45,241 sf). Businesses taking up the third largest amount of floorspace fall in the Grocery, Convenience, Specialty Foods category are mainly convenience stores with attached gas bars (21,641 sf). The node has a more even mix of local versus branded businesses (50% for each) as shown in **Table 5-5**, although branded business tend to have larger business footprints. They occupy 61% of retail floorspace.

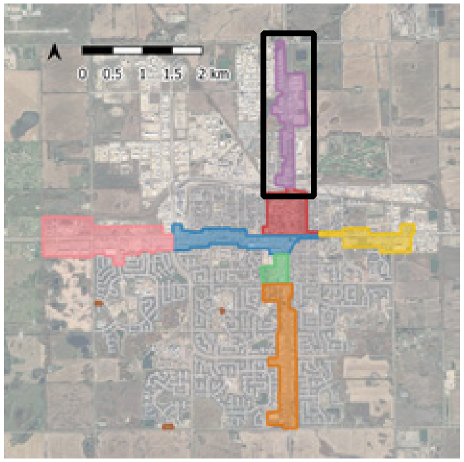
The node serves many employees working in the industrial area to the north-west of the node and the residential neighborhoods to the south-west, which primarily represent the Alberta side of Highway 17 (50 Avenue). Most lands east of the node are agricultural and almost all are owned by the City; these lands are likely to become an expansion area for the city's future industrial growth if the proposed amendments to the Northeast Area Structure Plan are approved (see "2.0 Regional and Local Context" for a review of the city's ASPs).

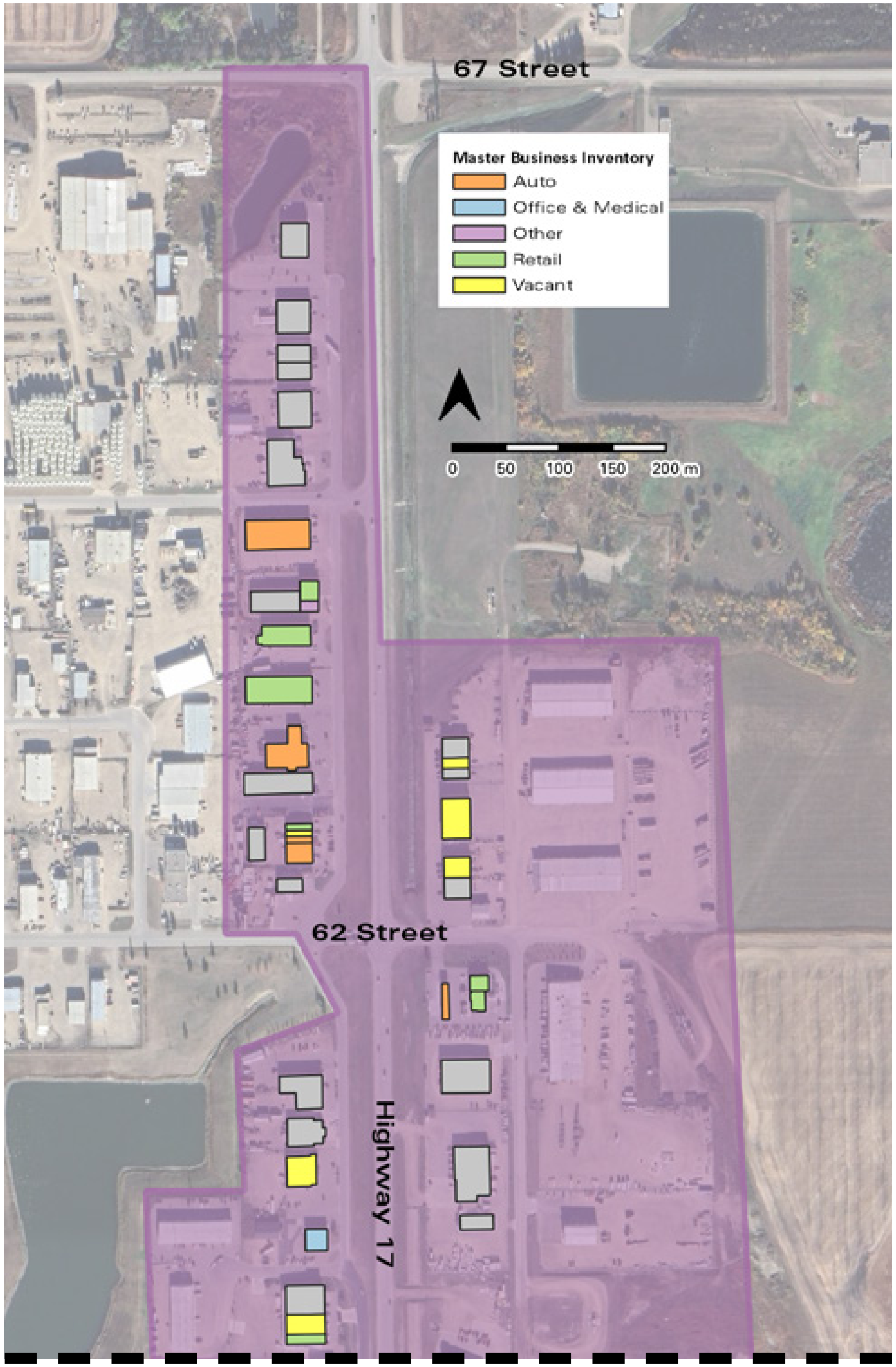
Should the ASP be approved, the area within and just beyond the eastern half of this node (east of Highway 17) will be zoned commercial and is likely to see a few more retail/commercial businesses that could serve the planned industrial businesses to the east.

Although vacancy in the North Industrial node is high at 23.9%, it is important to note that this is not all retail space and because of its context within and adjacent to the industrial lands, many of these spaces could be more accurately depicted as available for commercial or industrial uses.

As expected in a predominantly industrial-oriented area, auto service plays a key role at over 47,000 sf and this figure is likely even higher within the industrial lands to the west, which were not documented or inventoried as part of this particular study. Other categories of note in the area include Grocery, Specialty Foods & Conveniences and Electronics & Appliances, although the latter (Northwind Radio/Telus Dealer) is not a traditional retail format but rather a service depot and warehouse.

Figure 5-5. North Industrial Node
(Source: FBM)




67 Street
Master Business Inventory
Auto
Office & Medical
Other
Retail
Vacant
0
50
100
150
200 m
62 Street
Highway 17

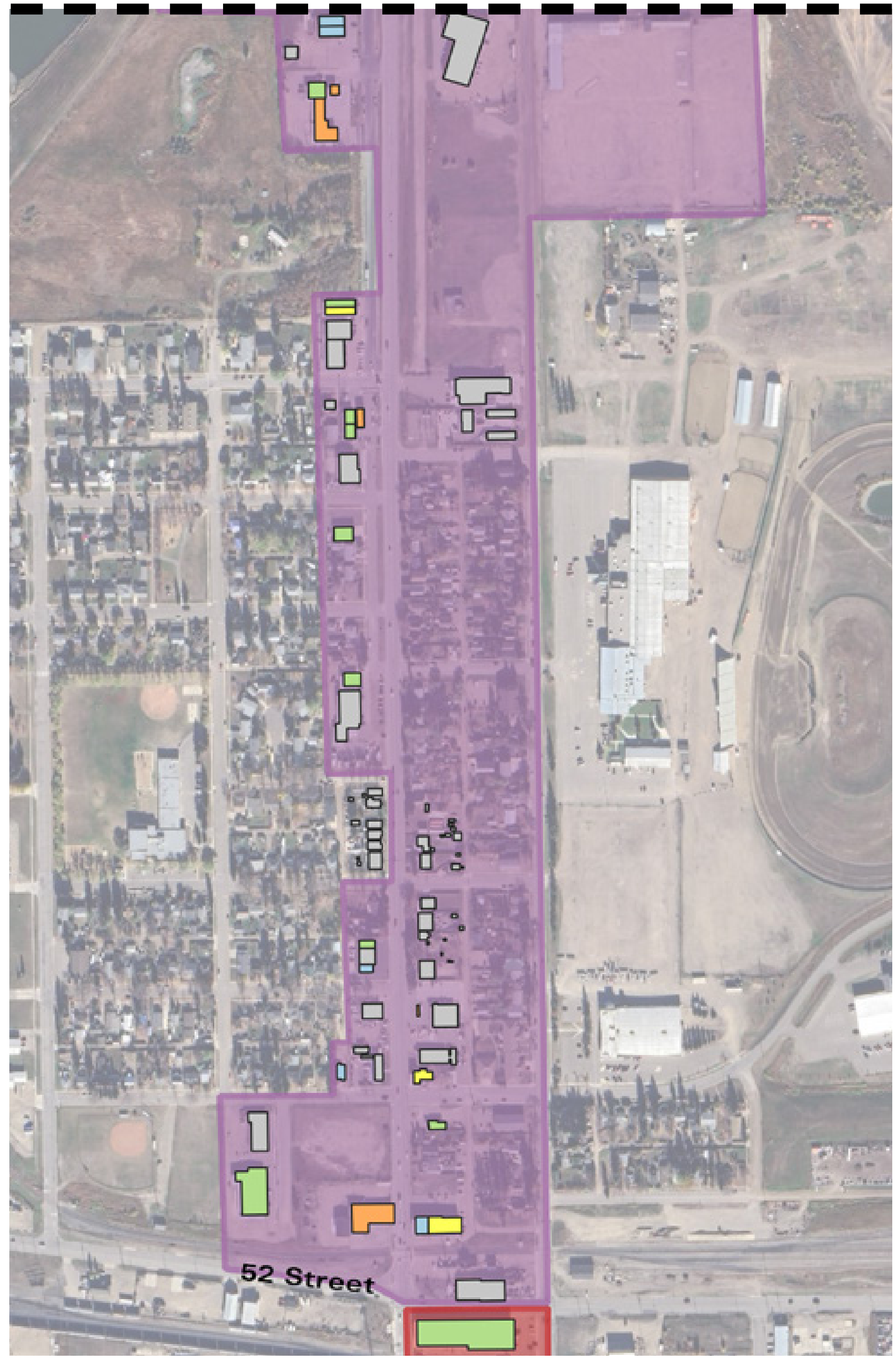

52 Street

Table 5-5. North Industrial Node Local versus Brand Summary
(Source: FBM)

total RETAIL ONLY			
72,884	Local	9	18
	Brand	9	
business count	Local	50%	
business count	Brand	50%	
floorspace	Local	28,717	72,884
floorspace	Brand	44,167	
floorspace	Local	39%	
floorspace	Brand	61%	
	Avg Local Size	3,191	4,049
	Avg Branded Size	4,907	

Table 5-6. North Industrial Node Inventory Summary
(Source: FBM)

MERCHANDISE CATEGORY	NORTH INDUSTRIAL FLOORSPACE (sq. ft.)	NORTH INDUSTRIAL MIX (%)
AUTO SERVICE	47,259	25.0%
VACANT	45,241	23.9%
GROCERY, CONVENIENCE & SPECIALTY FOODS	21,641	11.4%
ELECTRONICS & APPLIANCES	16,927	8.9%
PROFESSIONAL, MEDICAL & FINANCIAL	13,953	7.4%
HOME FURNITURE & DÉCOR	9,667	5.1%
QUICK SERVICE F&B	6,395	3.4%
FITNESS & LEISURE	5,243	2.8%
AUTO PARTS & ACCESSORIES	5,107	2.7%
TOYS & HOBBIES	3,669	1.9%
FULL SERVICE RESTAURANTS & PUBS	2,740	1.4%
SPECIALTY RETAIL	2,516	1.3%
ALCOHOL, TOBACCO & CANNABIS	2,191	1.2%
PERSONAL SERVICE	1,893	1.0%
FASHION & FOOTWEAR	0	0.0%
ARTS & ENTERTAINMENT	0	0.0%
SPORTING GOODS & OUTDOOR RECREATION	0	0.0%
HOME IMPROVEMENT & GARDENING	0	0.0%
PHARMACY	0	0.0%
JEWELRY & ACCESSORIES	0	0.0%
BEAUTY & WELLNESS	0	0.0%
BOOKS, MEDIA & COMPUTERS	0	0.0%
AUTO/RV/MOTORSPORTS DEALERSHIP	0	0.0%
TOTAL	**189,329**	**100.0%**
Retail Floorspace Excluding Non-Retail (Professional/Medical/Tourism/Light Industrial/Auto Service/VACANT)	**77,991**	**41%**
Total Estimated Retail Sales Excluding Non-Retail (Professional/Medical/Tourism/Light Industrial/Auto Service/VACANT)	**$19,517,264**	
Estimated Retail Sales Productivity ($/sf)	**$250**	

5.3 Downtown Node

The Downtown Node is the most urban in its form, with densely packed businesses having little to no setbacks from streets and sidewalks (see **Figure 5-6**).

Though community members criticized downtown (and the city overall) for not having enough local businesses in the Community Survey (see Section 6.0), the Downtown node boasts the highest ratio of local businesses in the City: 88% local versus 12% brand (**Table 5-7**). Branded businesses still tended to have larger footprints - 4,969 sf on average compared to 3,228 sf for local - but this size difference is significantly less than in other nodes.

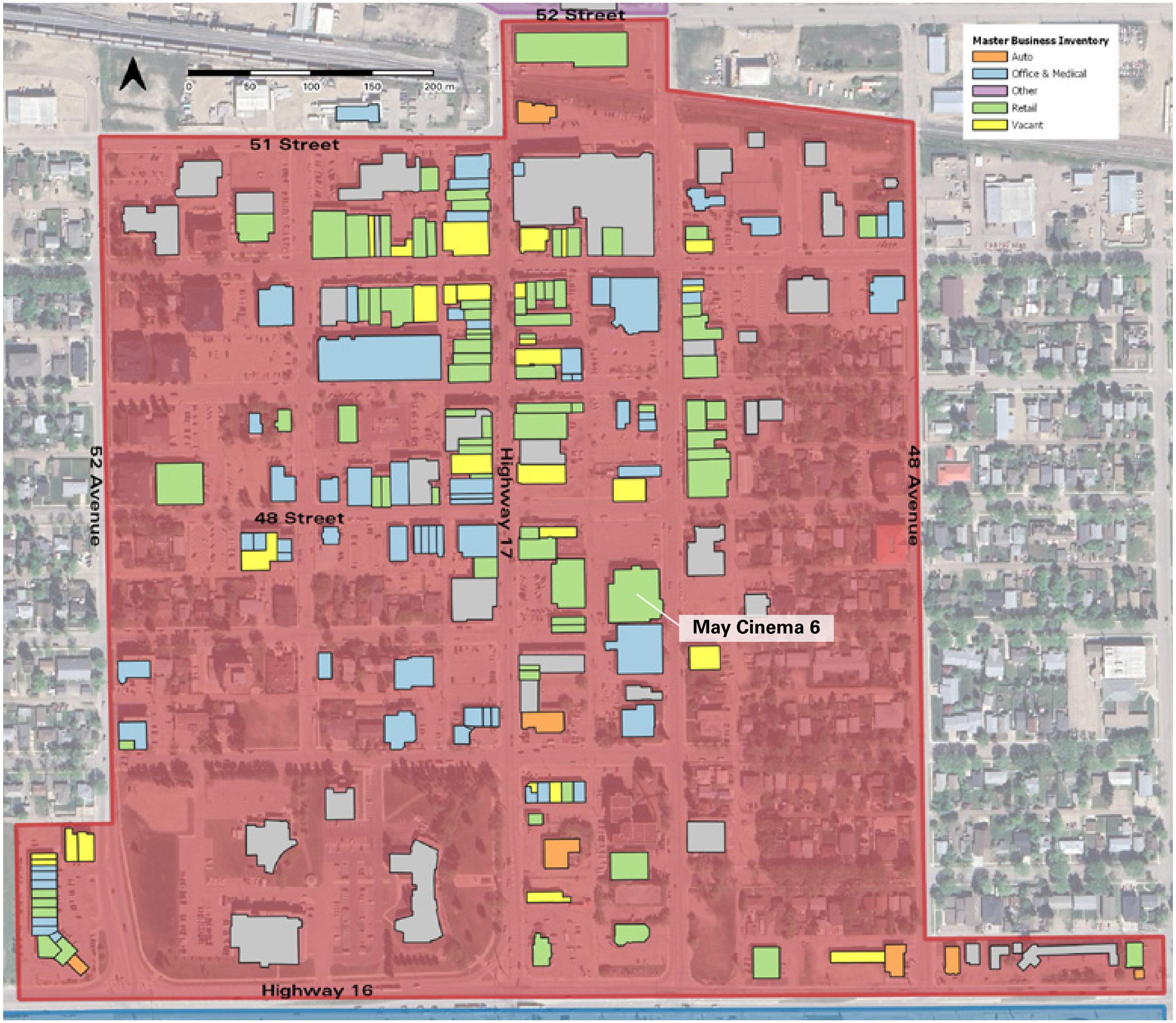


Figure 5-6. Downtown Node
(Source: FBM)

Table 5-7. Downtown Node Local versus Brand Summary
(Source: FBM)

total RETAIL ONLY			
264,260	Local	68	77
	Brand	9	
business count	Local	88%	
business count	Brand	12%	
floorspace	Local	219,536	264,260
floorspace	Brand	44,724	
floorspace	Local	83%	
floorspace	Brand	17%	
	Avg Local Size	3,228	3,432
	Avg Branded Size	4,969	

Table 5-8 shows Professional, Medical and Financial businesses occupy the largest proportion of floorspace by far in Downtown (37.4%). The next largest is Vacant space at 10.7% of downtown floorspace. The prominence of vacancies and professional/medical services in the Downtown is telling as to the current role Downtown plays in the city's retail market. More traditional types of retail occupy relatively small portions of the floorspace, with the next highest being Home Furniture & Decor at 7.5%, Personal Services (like hair dressers) at 6.4%, and Fitness & Leisure (such as fitness clubs or studios) at 5.7%. Downtown contains the city's only movie theatre (Figure 5-6). Though formerly considered an anchor in Lloydminster's Downtown, in 2021 the Lloydminster Public Library relocated to Lloyd Mall, removing yet another key draw to an already struggling node.

The May Cinema 6 remains an important anchor attraction to the Downtown and while there may have been pressures or desires in the past to provide a new, modern cinema elsewhere in the City, the May Cinema has proven resilient. In the post-Covid world, the movie theatre industry has continued to struggle in attracting visitor numbers and therefore it is not expected that demand for a new multiplex cinema would be supported in the near term, though this could resurface in 5 to 10 years.

In terms of retail sales productivity, the high vacancy and local independent nature of the downtown is a contributing factor to why overall retail sales productivity is estimated at $230 psf, which is below comparable downtowns which tend to average around $250 psf.

The Downtown area has faced and suffered from the same challenge as other urban cores across North America, with suburban growth and auto-oriented retail developments drawing businesses and customers out of the city centre and leading to more vacancies and challenges for businesses in the downtown core.

In Lloydminster, the community survey suggested that the downtown is largely perceived by the community as unsafe, empty (in terms of vacancy), and difficult to visit because of challenging parking. The city's Downtown Area Redevelopment Plan presents a vision intended to combat those perceptions. A Storefront Improvement Program as described in the Trends section of this report and identified in the DARP's implementation plan would be a valuable initiative to combat negative perceptions.

Additionally, it may be worth considering how and where the focal points of the Downtown function and perhaps look at creating a more compact area within which to invest to show a more profound regenerative impact as opposed to a diluted and dispersed result. In many downtown revitalizations across North America, it is becoming prevalent to redefine the "four corners" of the community and start rebuilding or focusing energy on this area and outward, much like the way the original downtown would have grown back in its heyday.

Local and independent retail is the lifeblood of the downtown and incentives that can incubate and attract locals entrepreneurs to a node with more favourable rental rates is an important consideration. In order to promote success, the businesses, property owners, building managers and city must all be thinking and operating on the same page when it comes to business attraction and retention. While there may be a number of obsolete or sub-standard retail spaces throughout the downtown, an important component is to document and profile those available spaces that are of a leaseable standard either for temporary pop up or permanent spaces.

Table 5-8. Downtown Node Inventory Summary
(Source: FBM)

MERCHANDISE CATEGORY	DOWNTOWN FLOORSPACE (sq. ft.)	DOWNTOWN MIX (%)
PROFESSIONAL, MEDICAL & FINANCIAL	219,154	37.4%
VACANT	62,834	10.7%
HOME FURNITURE & DÉCOR	44,105	7.5%
PERSONAL SERVICE	37,833	6.4%
FITNESS & LEISURE	29,829	5.1%
FASHION & FOOTWEAR	27,180	4.6%
ARTS & ENTERTAINMENT	20,910	3.6%
FULL SERVICE RESTAURANTS & PUBS	18,447	3.1%
SPORTING GOODS & OUTDOOR RECREATION	15,280	2.6%
AUTO PARTS & ACCESSORIES	14,342	2.4%
SPECIALTY RETAIL	13,777	2.3%
GROCERY, CONVENIENCE & SPECIALTY FOODS	11,580	2.0%
ELECTRONICS & APPLIANCES	10,922	1.9%
AUTO SERVICE	10,017	1.7%
QUICK SERVICE F&B	9,350	1.6%
HOME IMPROVEMENT & GARDENING	8,045	1.4%
ALCOHOL, TOBACCO & CANNABIS	7,495	1.3%
PHARMACY	3,927	0.7%
JEWELRY & ACCESSORIES	3,909	0.7%
BEAUTY & WELLNESS	3,311	0.6%
TOYS & HOBBIES	577	0.1%
BOOKS, MEDIA & COMPUTERS	0	0.0%
AUTO/RV/MOTORSPORTS DEALERSHIP	0	0.0%
TOTAL	**586,658**	**100.0%**
Retail Floorspace Excluding Non-Retail (Professional/Medical/Tourism/Light Industrial/Auto Service/VACANT)	**280,819**	**48%**
Total Estimated Retail Sales Excluding Non-Retail (Professional/Medical/Tourism/Light Industrial/Auto Service/VACANT)	**$64,592,340**	
Estimated Retail Sales Productivity ($/sf)	**$230**	

Figure 5-7. Vacancy at 4810 50 Avenue (near Central Suite Hotel)

Figure 5-8. Vacancy at 5004 50 Avenue (across from the Clock Tower)

Figure 5-9. Vacancy at 4417 50 Avenue (across from City Hall)

5.4 Power Centres Node

The Power Centres Node (See **Figure 5-10**) is so named because it contains many power centre style retail developments. Power centres in this node include, from west to east: Hampton Square, Brentwood Commons, Cornerstone, and West and East 70 Stations.

The Node serves as the top choice by far for shopping among both residents and non-residents, according to the community survey (see Section 6.0). It contains much of the City's new major commercial developments. Canadian Tire, currently located near 70 Avenue (see **Figure 5-10**), is going to be relocating to a larger new building on the far west of the node that is under construction at the time of writing (**Figure 5-11**). The new building will be over 130,000 sf in size and is scheduled to open in Fall 2022[1]. Another recent addition was Old Navy, a store requested by multiple respondents in the community survey (**Figure 5-12**).

1. MeridianSource.ca, New Canadian Tire To Open This Fall, May 4, 2022.

As shown in **Table 5-10**, Home Improvement and Gardening are the top retail offering in the node, making up 247,922 sf of floorspace. Fashion and Footwear are next at 120,302 sf followed by Grocery, Convenience & Specialty Foods at 101,308 sf. Sample vacancies are shown in **Figure 5-13, Figure 5-14, and Figure 5-15**. Brand businesses dominate in this node, making up 84% of the total number of businesses and 96% of floorspace (see **Table 5-9**). Brand footprints tend to be very large with branded businesses occupying almost four times as much floorspace on average than local businesses (12,282 sf versus 3,134 sf respectively).

The Power Centres Node contains several large undeveloped lots to the north of Highway 16 which are available for future commercial growth (as seen in **Figure 5-16**). The western-most part of the node is made of lands that only officially became part of the City of Lloydminster following the recently completed annexation (as detailed in Section 2.0).

Figure 5-10. Power Centres Node
(Source: FBM)

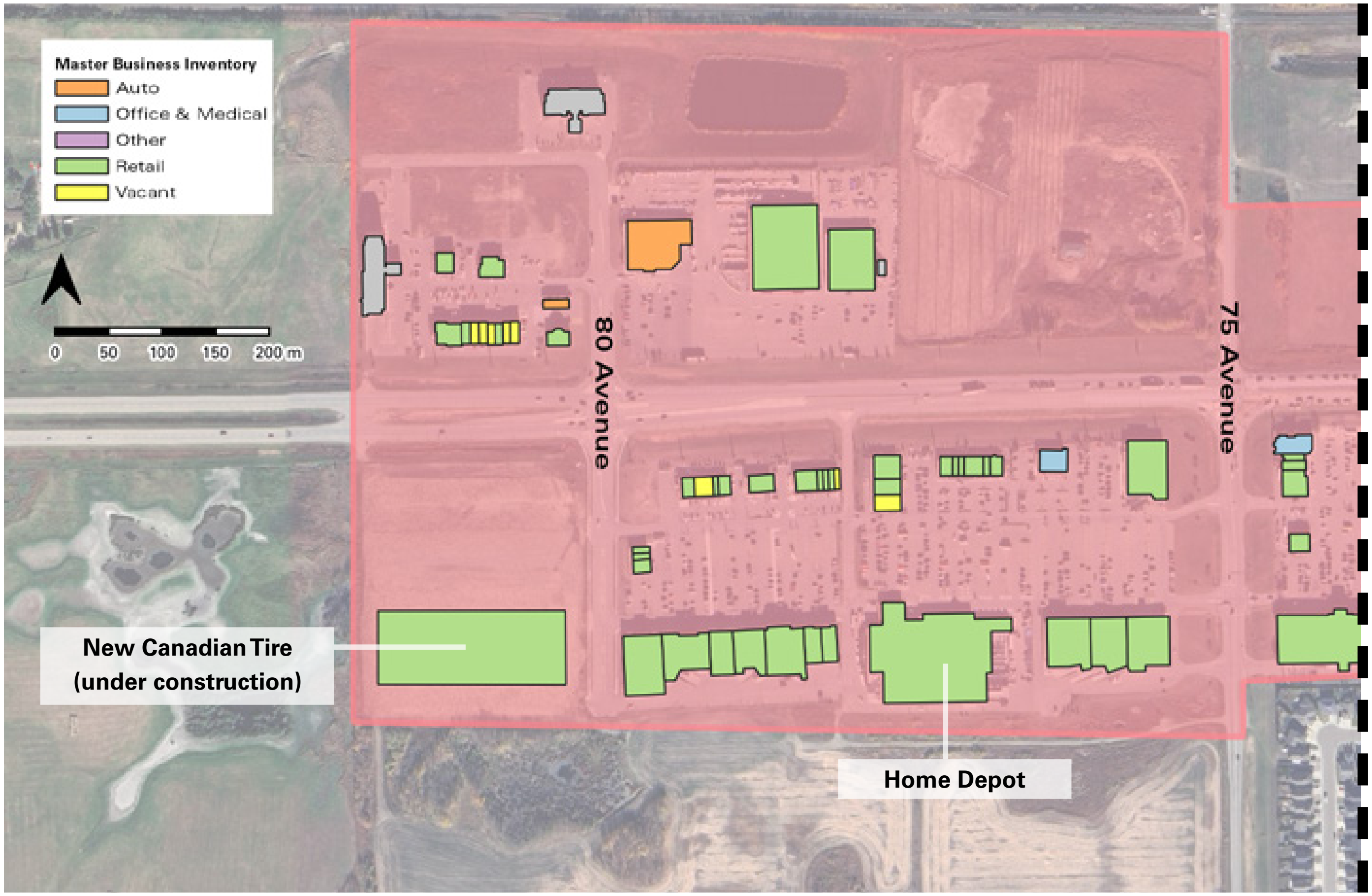


Table 5-9. Power Centres Node Local versus Brand Summary
(Source: FBM)

total RETAIL ONLY			
984,986	Local	14	90
	Brand	76	
business count	Local	16%	
business count	Brand	84%	
floorspace	Local	43,875	984,986
floorspace	Brand	941,110	
floorspace	Local	4%	
floorspace	Brand	96%	
	Avg Local Size	3,134	10,944
	Avg Branded Size	12,383	

Although the current vacancy sits at 7.1% this includes the former Canadian Tire space, which is misleading since the retailer itself is not leaving the community but rather expanding. Excluding this vacant space from the figures drops the vacancy to 3.0%, which is indicative of a very healthy retail structure. The former Canadian Tire also now represents an immediate opportunity to be subdivided or re-tenanted. Further evidence of this node's retail health is the high retail sales productivity which is estimated at $377 psf, which is estimated to be the highest in the city and validated by asking lease rates that exceed $30 psf on average.

This is notable also because of the strong branded mix, but also because of the larger store sizes, which often can bring down productivity figures. In addition to existing built inventory, there is still land north of Highway 16 that could become part of consolidated retail growth along the corridor.

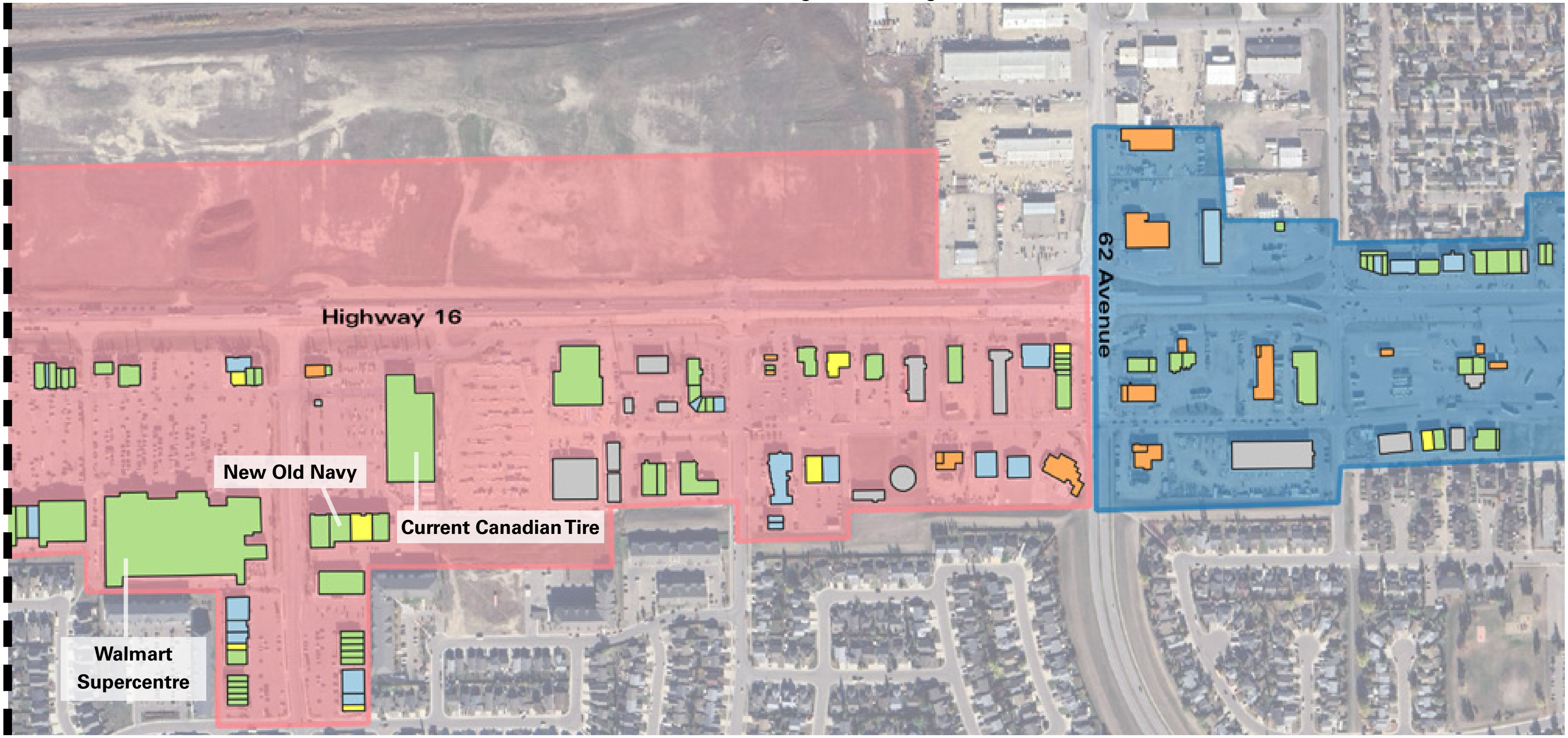


Table 5-10. Power Centres Node Inventory Summary
(Source: FBM)

MERCHANDISE CATEGORY	POWER CENTRES FLOORSPACE (sq. ft.)	POWER CENTRES MIX (%)
HOME IMPROVEMENT & GARDENING	247,922	15.7%
FASHION & FOOTWEAR	120,302	7.6%
VACANT	112,170	7.1%
PROFESSIONAL, MEDICAL & FINANCIAL	110,278	7.0%
GROCERY, CONVENIENCE & SPECIALTY FOODS	101,308	6.4%
SPECIALTY RETAIL	79,730	5.0%
AUTO PARTS & ACCESSORIES	64,561	4.1%
AUTO SERVICE	51,894	3.3%
FULL SERVICE RESTAURANTS & PUBS	46,999	3.0%
SPORTING GOODS & OUTDOOR RECREATION	46,625	2.9%
QUICK SERVICE F&B	44,500	2.8%
BEAUTY & WELLNESS	41,999	2.7%
HOME FURNITURE & DÉCOR	37,025	2.3%
TOYS & HOBBIES	35,649	2.3%
ELECTRONICS & APPLIANCES	33,811	2.1%
ALCOHOL, TOBACCO & CANNABIS	29,652	1.9%
PHARMACY	18,461	1.2%
FITNESS & LEISURE	14,390	0.9%
JEWELRY & ACCESSORIES	7,250	0.5%
BOOKS, MEDIA & COMPUTERS	4,666	0.3%
PERSONAL SERVICE	3,359	0.2%
AUTO/RV/MOTORSPORTS DEALERSHIP	0	0.0%
ARTS & ENTERTAINMENT	0	0.0%
TOTAL	**1,581,726**	**100.0%**
Retail Floorspace Excluding Non-Retail (Professional/Medical/Tourism/Light Industrial/Auto Service/VACANT)	**978,210**	**62%**
Total Estimated Retail Sales Excluding Non-Retail (Professional/Medical/Tourism/Light Industrial/Auto Service/VACANT)	**$368,417,959**	
Estimated Retail Sales Productivity ($/sf)	**$377**	

Figure 5-11. New Canadian Tire Site Under Construction

Figure 5-12. New Old Navy Location, 4211 70 Avenue

Figure 5-13. Vacancy at 4209 70 Avenue (between Lammle's & Old Navy)

Figure 5-14. Vacancy at 7703 44 Street (in front of Home Depot)

Figure 5-15. Vacancies at 8120 44 Street (in Hampton Square)

Figure 5-16. Lot for Sale on North-West corner of 45 Street & 80 Avenue

The Power Centres node has a retail merchandise mix that includes a wide array of depth and variety, though it is noticeably absent in Arts & Entertainment. On the surface this could be reflective of the absence of a larger multiplex cinema, but as noted in the Downtown profile, the May Cinema 6 has an established presence and this is likely not to change in the near term.

However, there may be opportunities to look at other types of indoor entertainment that may be drawn to vacancies like the Canadian Tire. Examples could include and indoor skate and bike park or go-karts that would provide indoor amenities for the community's youth and be more attractive in the challenging winter months.

The Power Centres node is the key to Lloydminster's regional success and attractiveness, though it is also a contributor to the Downtown's ongoing challenges for businesses.

5.5 Lloyd Mall Node

Centrally located along Highway 16, the Lloyd Mall Node contains Lloyd Mall itself along with multiple other shopping plazas, food services, and accommodations such as hotels and inns. The Node is another major shopping area in the city, though not as popular as the Power Centres node, serving residential areas to both the north and south.

A map of the Lloyd Mall is presented in **Figure 5-20** offering a closer look at vacant retail floor space available at the time of writing. The Mall continues to attract customers although, like many enclosed malls across Canada, it has been struggling to fill vacancies.

The summary of the retail inventory in this node is shown in **Table 5-12**. The node is a go-to spot for groceries in the city, with Grocery, Convenience and Specialty Foods taking up the largest amount of retail space at 133,942 sf. Fashion and Footwear are next at 94,670 sf, followed by 57,668 sf of Full Service Restaurants & Pubs.

Though slightly less dominant than in the Power Centres Node, branded business still dominate

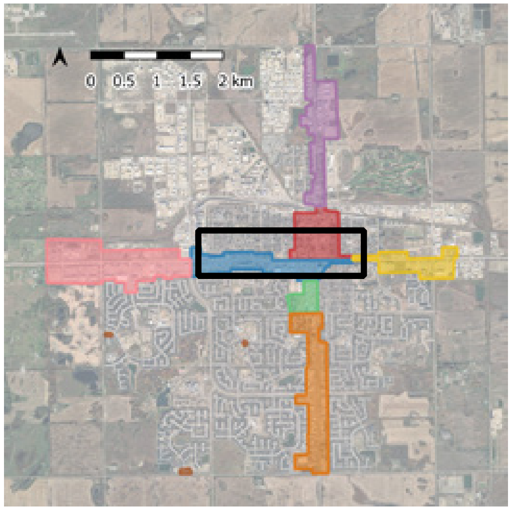


Figure 5-17. Lloyd Mall Node
(Source: FBM)

Table 5-11. Lloyd Mall Node Local versus Brand Summary
(Source: FBM)

total RETAIL ONLY			
518,118	Local	35	**106**
	Brand	71	
business count	Local	33%	
business count	Brand	67%	
floorspace	Local	105,442	518,118
floorspace	Brand	412,676	
floorspace	Local	20%	
floorspace	Brand	80%	
Avg Local Size		3,013	4,888
Avg Branded Size		5,812	

local businesses, taking up 67% in terms of numbers and 80% of floorspace (see **Table 5-11**). Their business footprints are double the size of local on average (5,812 sf for brand versus 3,013 for local).

Vacancy for the node represents 8.1% of the total nodal floorspace in which the mall itself accounts for just under 60% of that total. The adjacent Choice REIT properties anchored by Superstore has some vacancy, but it is recently completed new space and thus would be attractive for branded or local businesses. Photos of retail spaces in front of the Superstore available for lease at the time of fieldwork are shown in **Figure 5-18 and Figure 5-19**. Other vacancies are located east of Highway 17 are in older strip centres and thus not as desirable.

Ardene's recently announced its closure at Lloyd Mall, but there are unconfirmed reports that it will be relocating elsewhere in the city.

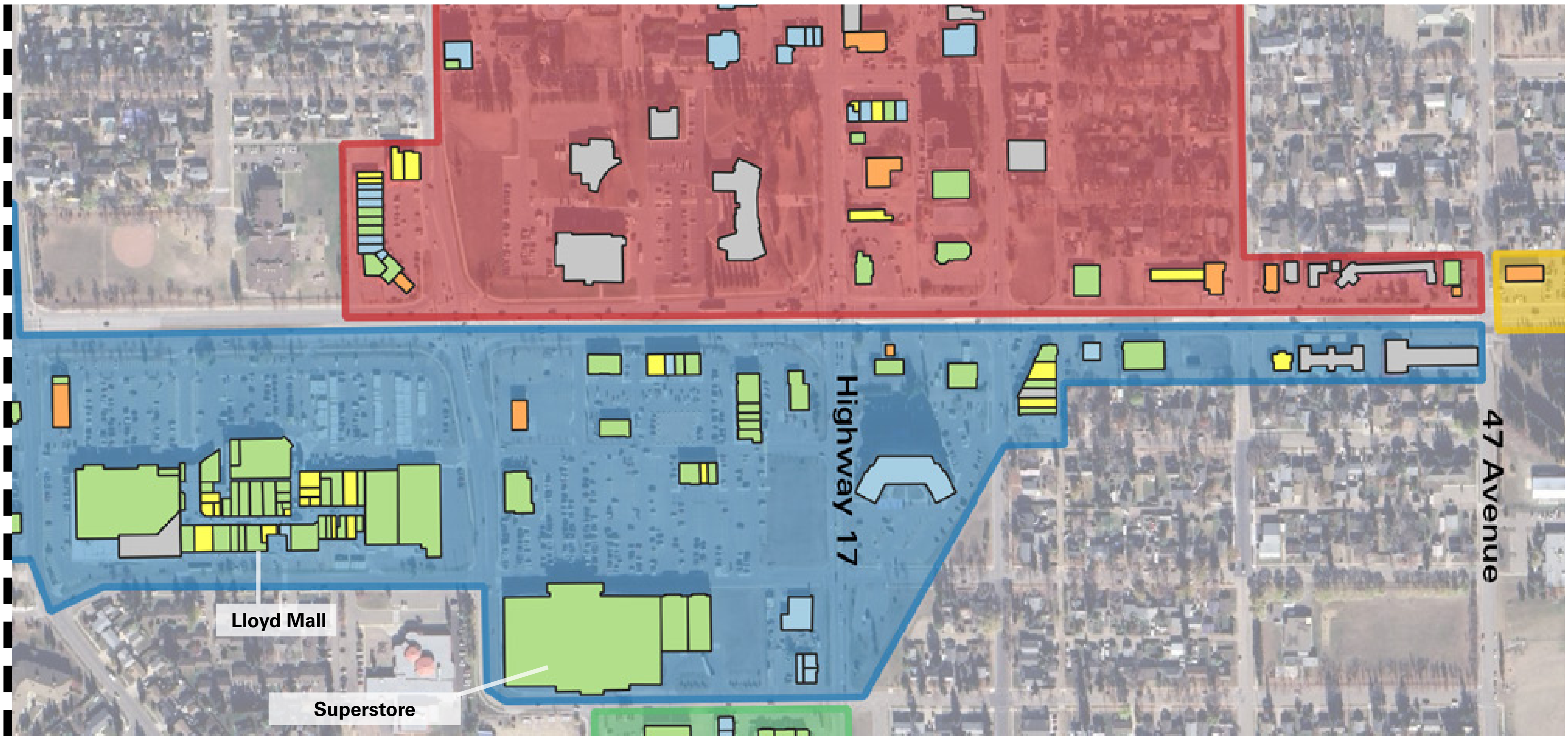


Table 5-12.
Lloyd Mall Node Inventory Summary
(Source: FBM)

MERCHANDISE CATEGORY	LLOYD MALL FLOORSPACE (sq. ft.)	LLOYD MALL MIX (%)
GROCERY, CONVENIENCE & SPECIALTY FOODS	132,942	14.2%
FASHION & FOOTWEAR	94,670	10.1%
PROFESSIONAL, MEDICAL & FINANCIAL	92,362	9.9%
VACANT	75,655	8.1%
AUTO SERVICE	71,286	7.6%
FULL SERVICE RESTAURANTS & PUBS	57,668	6.2%
SPECIALTY RETAIL	33,906	3.6%
QUICK SERVICE F&B	32,823	3.5%
HOME FURNITURE & DÉCOR	29,137	3.1%
BEAUTY & WELLNESS	28,394	3.0%
ALCOHOL, TOBACCO & CANNABIS	25,195	2.7%
AUTO PARTS & ACCESSORIES	22,568	2.4%
PERSONAL SERVICE	15,180	1.6%
PHARMACY	12,872	1.4%
FITNESS & LEISURE	11,176	1.2%
HOME IMPROVEMENT & GARDENING	8,466	0.9%
ELECTRONICS & APPLIANCES	8,291	0.9%
SPORTING GOODS & OUTDOOR RECREATION	7,883	0.8%
JEWELRY & ACCESSORIES	7,874	0.8%
BOOKS, MEDIA & COMPUTERS	5,614	0.6%
ARTS & ENTERTAINMENT	4,458	0.5%
TOYS & HOBBIES	940	0.1%
AUTO/RV/MOTORSPORTS DEALERSHIP	0	0.0%
TOTAL	**934,008**	**100.0%**
Retail Floorspace Excluding Non-Retail (Professional/Medical/Tourism/Light Industrial/Auto Service/VACANT)	**540,057**	**58%**
Total Estimated Retail Sales Excluding Non-Retail (Professional/Medical/Tourism/Light Industrial/Auto Service/VACANT)	**$189,801,528**	
Estimated Retail Sales Productivity ($/sf)	**$351**	

Figure 5-18. Vacancy in Unit 103, 5027 44 Street (in Lloyd Mall Node)
(Source: FBM)

Figure 5-19. Vacancy in Unit 103C, 5027 44 Street (in Lloyd Mall Node)
(Source: FBM)

Figure 5-20. Lloyd Mall: Sitemap & Available Units
(Source: Lloyd Mall, 2019)

*Most vacant units were consistent with the May 2022 fieldwork conducted as part of this study. Those that are now filled or newly vacant are noted in the sitemap in **orange**.

sitemap & available units

Potential Pad Opportunity

- Centrally located in Lloydminster
- Enclosed shopping centre located on Yellowhead Highway
- $12 M redevelopment and re-merchandising recently completed
- Exterior signage and exterior entrance opportunities
- Potential pad opportunity
- Shadow anchored by Real Canadian Supertore
- Ample parking

103	Ardene	115	Available 3,395 SF	137	Available 1,593 SF	157	Available 3,121 SF	183	Paris Jewellers
105a	Available 578 SF	119	Available 2,354 SF	139	Ricki's	159	Telus	185	Eclipse
105b	Available 392 SF	123	Available 6.804 SF	142	Pearle Vision	164	Bell	187	Bath & Body Works
105c	Available 394 SF	125	Available 1,091 SF	145	Available 1,531 SF	167	Hair Den	189	Below the Belt
107	Q-Nails	127	Available 2,092 SF	147	Suzanne's	175	Lids	191	La Vie en Rose
109	Available 1,375 SF	129	Quarks Shoes	149	Available 731 SF	177	Available 1,257 SF	193	Body Shop
111	Spencer Gifts	131	Amigo Leather	151	Coles	179	Available 1,189 SF	195	Sangsters
113	Warehouse One	135	Claire's	155	Boathouse	181	Available 656 SF	199	Wok 2 Go

5.6 Gold Horse Casino Node

As the only node located entirely on the Saskatchewan side of the city, the Gold Horse Casino Node contains relatively recent retail developments. The Petro Canada gas station at the far east of the node was under construction at the time of fieldwork (see **Figure 5-21**), and a sign located on the former Sawmill Restaurant vacant building shown on the north side of Highway 16 is advertising a new full-service restaurant "Sawyers" as coming soon (see **Figure 5-23**).

Though the Alberta side of the city tends to attract more businesses due in part to more favourable provincial regulations, this Saskatchewan-side node still has the potential to host future commercial development for the city, in conjunction with a potential new arena development and the existing presence of the Gold Horse Casino.

As shown in **Figure 5-21**, the land directly adjacent to the node to the south-east is the proposed location of the new Lloydminster Place Event Arena.

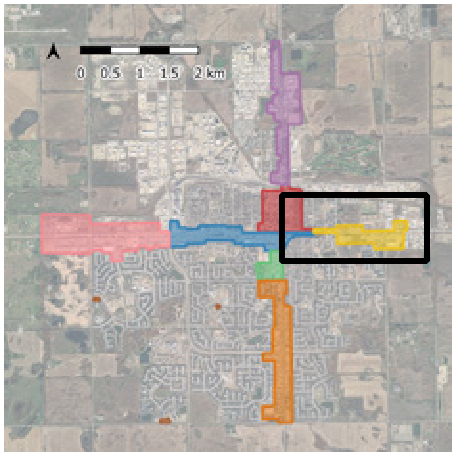


Figure 5-21. Gold Horse Casino Node
(Source: FBM)

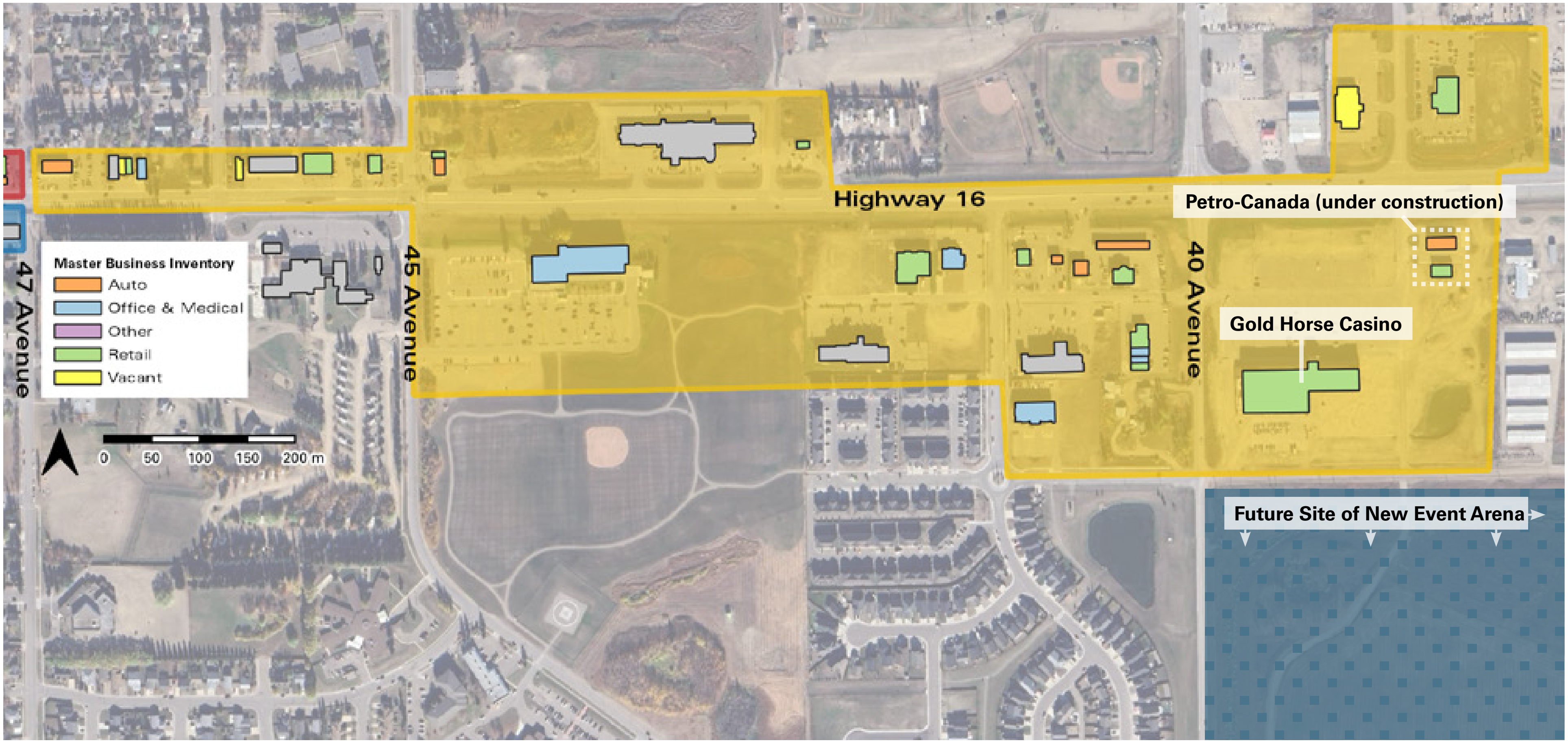


Table 5-13. Gold Horse Casino Node Local versus Brand Summary
(Source: FBM)

total RETAIL ONLY			
96,308	Local	6	13
	Brand	7	
business count	Local	46%	
business count	Brand	54%	
floorspace	Local	74,425	96,308
floorspace	Brand	21,883	
floorspace	Local	77%	
floorspace	Brand	23%	
Avg Local Size		12,404	7,408
Avg Branded Size		3,126	

As reviewed in Section 2.0, the event arena site is part of the Wigfield ASP which is currently undergoing an amendment process; if approved, the updated ASP will create more commercial opportunities around the Event Arena.

As a newer retail node, the site has the smallest number of businesses of the seven major retail nodes with 13 businesses. Unlike the other nodes, local businesses occupy a higher share of local floorspace than branded. The Gold Horse Casino itself takes credit for the high share of Local versus Brand floorspace in this node, with 77% of floorspace covered by local businesses and 23% by branded even while in terms of number of businesses the node has one more branded business than local (see **Table 5-13**). The Casino also contributes to Arts & Entertainment representing the top Merchandise Category at 57,921 sf (**Table 5-14**). Professional, Medical and Financial floorspace at 42,138 sf plays an important role in this node, given its proximity to the Regional Hospital for Saskatchewan residents.

Vacant space, which sits at 8.5% or 14,725 sf is largely because of the former Sawmill Restaurant which accounts for 11,475 sf of this total.

Table 5-14. Gold Horse Casino Node Inventory Summary
(Source: FBM)

MERCHANDISE CATEGORY	GOLD HORSE CASINO FLOORSPACE (sq. ft.)	GOLD HORSE CASINO MIX (%)
ARTS & ENTERTAINMENT	57,921	33.6%
PROFESSIONAL, MEDICAL & FINANCIAL	42,138	24.4%
VACANT	14,725	8.5%
AUTO/RV/MOTORSPORTS DEALERSHIP	10,107	5.9%
GROCERY, CONVENIENCE & SPECIALTY FOODS	10,048	5.8%
AUTO SERVICE	7,924	4.6%
ELECTRONICS & APPLIANCES	7,104	4.1%
QUICK SERVICE F&B	6,719	3.9%
ALCOHOL, TOBACCO & CANNABIS	4,408	2.6%
HOME IMPROVEMENT & GARDENING	0	0.0%
AUTO PARTS & ACCESSORIES	0	0.0%
FULL SERVICE RESTAURANTS & PUBS	0	0.0%
FITNESS & LEISURE	0	0.0%
TOYS & HOBBIES	0	0.0%
BEAUTY & WELLNESS	0	0.0%
PERSONAL SERVICE	0	0.0%
HOME FURNITURE & DÉCOR	0	0.0%
SPORTING GOODS & OUTDOOR RECREATION	0	0.0%
PHARMACY	0	0.0%
SPECIALTY RETAIL	0	0.0%
FASHION & FOOTWEAR	0	0.0%
JEWELRY & ACCESSORIES	0	0.0%
BOOKS, MEDIA & COMPUTERS	0	0.0%
TOTAL	**172,488**	**100.0%**
Retail Floorspace Excluding Non-Retail (Professional/Medical/Tourism/Light Industrial/Auto Service/VACANT)	**96,308**	**56%**
Total Estimated Retail Sales Excluding Non-Retail (Professional/Medical/Tourism/Light Industrial/Auto Service/VACANT)	**$28,311,631**	
Estimated Retail Sales Productivity ($/sf)	**$294**	

Figure 5-22. Petro-Canada Under Construction in Gold Horse Casino Node
(Source: FBM)

Figure 5-23. Future Location of Sawyer's Restaurant, 3902 44 Street
(Source: FBM)

5.7 Coop Marketplace Node

The smallest contiguous retail node in terms of land area coverage is the Co-op Marketplace Node. It serves as a retail-focused shopping area on the west (Alberta) side of Highway 17.

Its anchor stores include Coop Marketplace and Fabricland (see **Figure 5-24**). New retail developments shown in **Figure 5-24** have recently been built in the area situated behind or west of the Coop Marketplace. This new development has only a few vacant spaces remaining and has proved to be successful in attracting, retail as well as Professional, Medical & Financial Services.

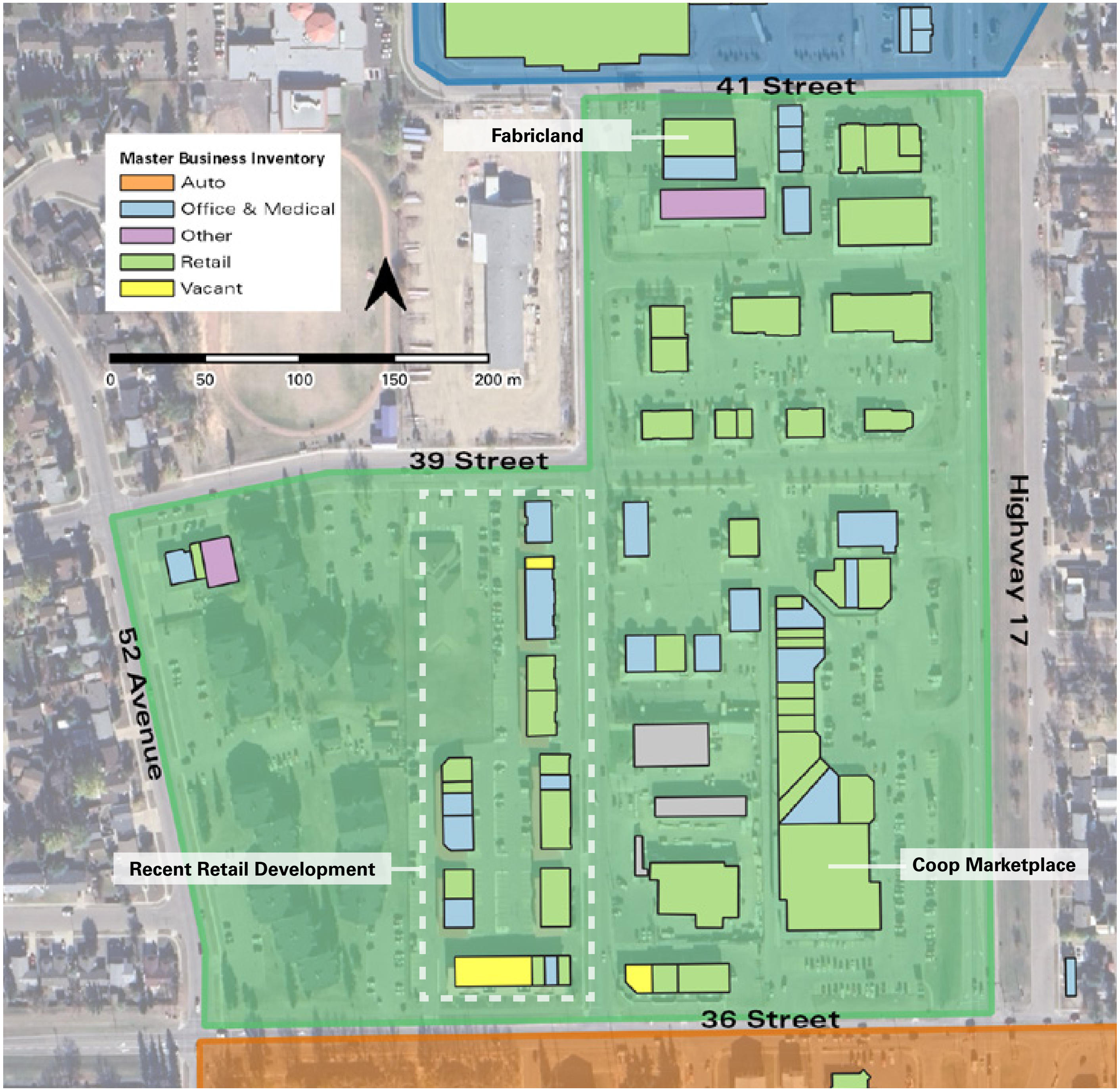


Figure 5-24. Coop Marketplace Node
(Source: FBM)

Table 5-15. Coop Marketplace Node Local versus Brand Summary
(Source: FBM)

	total RETAIL ONLY		
203,417	Local	24	44
	Brand	20	
business count	Local	55%	
business count	Brand	45%	
floorspace	Local	77,591	203,417
floorspace	Brand	125,826	
floorspace	Local	38%	
floorspace	Brand	62%	
	Avg Local Size	3,233	4,623
	Avg Branded Size	6,291	

As shown in **Table 5-15**, the Coop Node has slightly more local businesses than branded (55% versus 45%), though brands still occupy more of the total floorspace (62% for brand and 38% for local). It is worth noting that while Coop is a recognized brand, the ownership is franchised locally and thus it can equally be regarded as a local business, much like a Home Hardware.

The node's top Merchandise Category is Professional, Medical, & Financial at 219,154 of the marketplace mix (**Table 5-14**). Along with the Lloyd Mall Node and the Power Centres Node, this node serves as another destination for Lloydminster community members seeking groceries, with Grocery, Convenience and Specialty Foods being the second most common business type occupying 35,854 sf. The major grocery destination is Coop Marketplace on the corner of 36 Street and Highway 17.

There are potential plans for an expansion of the Coop Marketplace, but at the time of this report's writing, it is unclear if the expansion would be to the existing building or if the Coop would be looking to relocate to a single purpose-built larger building, elsewhere in the city.

Vacancy in this node is not a concern today as it seems to garner strong local customer patronage that supports the current mix. With a vacancy rate estimated at 3.4% the node is very healthy, largely because of the draw and loyal customer base generated by the Coop. If Coop were to relocate, this may create a vacuum at this node resulting in higher vacancies and therefore it would be wise to determine more definitively what the future plans for the Coop Grocery are so that appropriate proactive strategies for business retention and backfilling of the space can be prepared.

Figure 5-25. Vacancy at Unit C, 3601 51 Avenue Node (behind Coop Marketplace)
(Source: FBM)

Table 5-16.
Coop Marketplace Node Inventory Summary
(Source: FBM)

MERCHANDISE CATEGORY	COOP MARKETPLACE FLOORSPACE (sq. ft.)	COOP MARKETPLACE MIX (%)
PROFESSIONAL, MEDICAL & FINANCIAL	84,454	28.3%
GROCERY, CONVENIENCE & SPECIALTY FOODS	35,413	11.9%
SPECIALTY RETAIL	26,516	8.9%
PERSONAL SERVICE	21,197	7.1%
HOME IMPROVEMENT & GARDENING	19,316	6.5%
FASHION & FOOTWEAR	19,115	6.4%
QUICK SERVICE F&B	19,099	6.4%
ALCOHOL, TOBACCO & CANNABIS	14,158	4.8%
HOME FURNITURE & DÉCOR	13,716	4.6%
VACANT	10,042	3.4%
FITNESS & LEISURE	9,301	3.1%
BEAUTY & WELLNESS	6,594	2.2%
ELECTRONICS & APPLIANCES	5,543	1.9%
FULL SERVICE RESTAURANTS & PUBS	4,942	1.7%
SPORTING GOODS & OUTDOOR RECREATION	4,813	1.6%
TOYS & HOBBIES	3,695	1.2%
ARTS & ENTERTAINMENT	0	0.0%
AUTO PARTS & ACCESSORIES	0	0.0%
AUTO SERVICE	0	0.0%
PHARMACY	0	0.0%
JEWELRY & ACCESSORIES	0	0.0%
AUTO/RV/MOTORSPORTS DEALERSHIP	0	0.0%
BOOKS, MEDIA & COMPUTERS	0	0.0%
TOTAL	**297,912**	**100.0%**
Retail Floorspace Excluding Non-Retail (Professional/Medical/Tourism/Light Industrial/Auto Service/VACANT)	**203,417**	**68%**
Total Estimated Retail Sales Excluding Non-Retail (Professional/Medical/Tourism/Light Industrial/Auto Service/VACANT)	**$70,087,077**	
Estimated Retail Sales Productivity ($/sf)	**$345**	

5.8 Auto Cluster Node

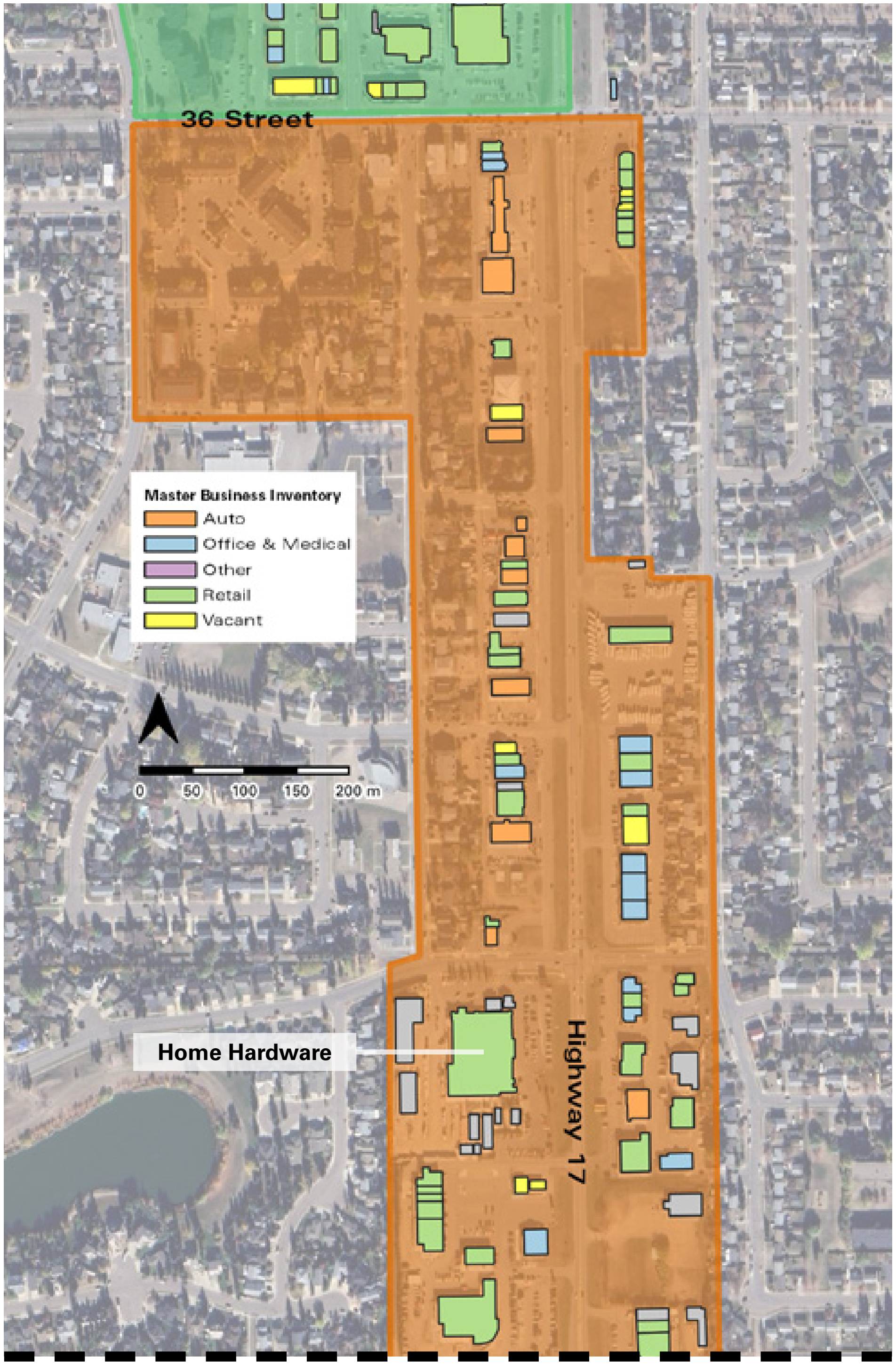
The Auto Cluster Node is so named because it contains the majority of automotive dealers and auto-related services in the city, along with a mix of retail and professional/service-oriented shopping plazas and freestanding pads. It is the closest node to many of the residential neighborhoods in Lloydminster, surrounded on the both the western and eastern sides. It is also anchored at the south end by the city's largest indoor/outdoor community recreational amenity - Servus Sports Centre.

The large node serves several purposes for the community. First, it acts as the automotive hub for the community. As shown in **Figure 5-26**, most auto services (repair shops, car washes, etc) are located in the northern portion of the node and most of the dealerships are centred near the intersection of Highway 17 and 25th Street on the Alberta side, with the exception of Boundary Motorsports and Ulmer Chevrolet Cadillac which are located in Saskatchewan. The node also acts as a medical and professional services hub, with multiple specialized medical clinics, law firms, and professionals like surveyors, accountants, and real estate agencies. Lastly, the node offers a large selection of home improvement retailers such as Home Hardware and more smaller specialized shops like End of the Roll Flooring Centre and Accent Lighting.

South of the Auto Cluster Node is designated for future commercial and residential growth, with the area south-east of the 12 Street-Highway 17 intersection zoned for Urban Expansion and south-west being newly acquired from the recently completed annexation process (see **Figure 5-27**).

The three main purposes of the node are made clear by the marketplace mix summarized in **Table 5-18**. Auto/Motorsports Dealerships occupy the most floorspace at 25% and auto service the fourth most at 165,739 sf. Professional, Medical and Financial services take up 135,877 sf of the floorspace and Home Improvement and Gardening are third at 87,647 sf.

Figure 5-26. Auto Cluster Node
(Source: FBM)



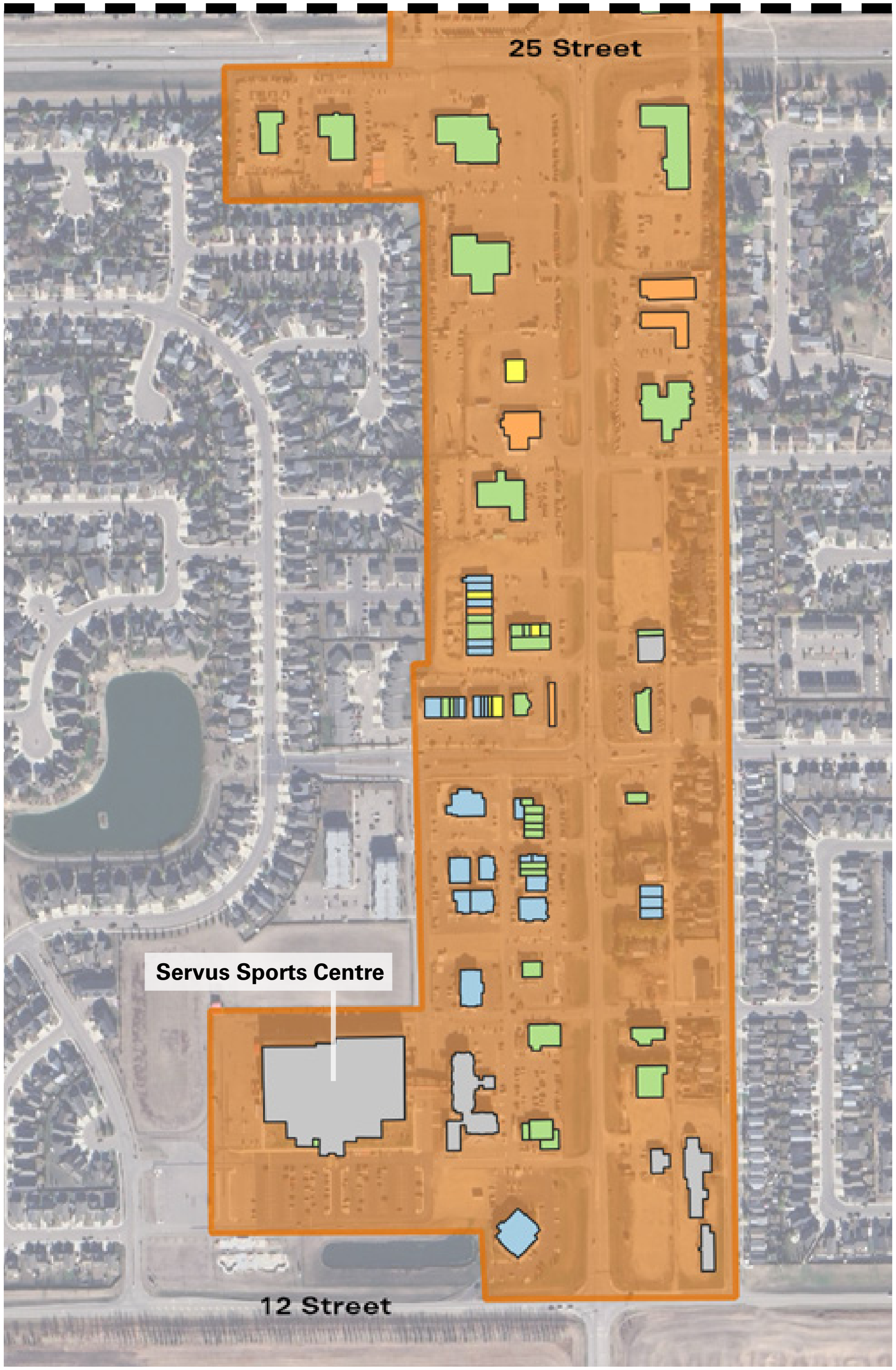


Table 5-17. Auto Cluster Node Local versus Brand Summary
(Source: FBM)

total RETAIL ONLY			
402,436	Local	32	67
	Brand	35	
business count	Local	48%	
business count	Brand	52%	
floorspace	Local	107,128	402,436
floorspace	Brand	295,308	
floorspace	Local	27%	
floorspace	Brand	73%	
Avg Local Size		3,348	6,007
Avg Branded Size		8,437	

Vacancy in the area is low compared to other nodes at 4.6%. Sample vacancies are shown in **Figure 5-28 and Figure 5-29**.

This node is quite a dispersed node with a number of properties that are older, particularly on the Saskatchewan side of Highway 17. As residential activity continues expanding southward, it is realistic to think that other neighbourhood nodes may be proposed in some of the newer communities, but this is likely beyond the local 5 or 10-year horizon.

As shown in **Table 5-17**, the split between local and branded businesses is close in terms of business count (48% local versus 52% brand), with brands continuing to have larger store footprints occupying 73% of floorspace and 27% for local. The larger branded composition is attributable to the number of auto dealerships.

Over the long-term there may be consideration for this particular corridor to look at intensifying and densifying the land uses in which case it could mean consolidating the commercial distribution and it may encounter scenarios where auto dealerships consider relocating to other areas in the community, such as along Highway 16.

Table 5-18.
Auto Cluster Node Inventory Summary
(Source: FBM)

MERCHANDISE CATEGORY	AUTO CLUSTER FLOORSPACE (sq. ft.)	AUTO CLUSTER MIX (%)
AUTO/RV/MOTORSPORTS DEALERSHIP	165,739	25.0%
PROFESSIONAL, MEDICAL & FINANCIAL	135,877	20.5%
HOME IMPROVEMENT & GARDENING	87,637	13.2%
AUTO SERVICE	62,832	9.5%
VACANT	30,721	4.6%
QUICK SERVICE F&B	29,326	4.4%
AUTO PARTS & ACCESSORIES	26,263	4.0%
GROCERY, CONVENIENCE & SPECIALTY FOODS	17,217	2.6%
FULL SERVICE RESTAURANTS & PUBS	12,957	2.0%
FITNESS & LEISURE	12,939	2.0%
TOYS & HOBBIES	12,225	1.8%
BEAUTY & WELLNESS	10,845	1.6%
PERSONAL SERVICE	10,146	1.5%
ALCOHOL, TOBACCO & CANNABIS	9,433	1.4%
HOME FURNITURE & DÉCOR	7,460	1.1%
SPORTING GOODS & OUTDOOR RECREATION	6,767	1.0%
PHARMACY	6,736	1.0%
ELECTRONICS & APPLIANCES	6,320	1.0%
ARTS & ENTERTAINMENT	3,747	0.6%
SPECIALTY RETAIL	2,945	0.4%
FASHION & FOOTWEAR	0	0.0%
JEWELRY & ACCESSORIES	0	0.0%
BOOKS, MEDIA & COMPUTERS	0	0.0%
TOTAL	**663,080**	**100.0%**
Retail Floorspace Excluding Non-Retail (Professional/Medical/Tourism/Light Industrial/Auto Service/VACANT)	**428,700**	**65%**
Total Estimated Retail Sales Excluding Non-Retail (Professional/Medical/Tourism/Light Industrial/Auto Service/VACANT)	**$118,112,267**	
Estimated Retail Sales Productivity ($/sf)	**$276**	

Figure 5-27. Future Development Areas South of Auto Cluster Node

Figure 5-28. Vacancy at 2702 50 Avenue (South of Home Hardware)

Figure 5-29. Vacancy at Unit 3, 3427 50 Avenue (in Meridian Plaza)

5.9 Neighbourhood Commercial Nodes

Lloydminster's retail offerings encompass three Neighbourhood Commercial (NC) Nodes, which each serve surrounding residential neighborhoods (see **Figure 5-30**). The three NC nodes are currently located in the south-eastern quarter of the City. NC Node A is a gas station with convenience store (**Figure 5-31**). NC Node B is a shopping plaza that includes a hair dresser, pet groomer, liquor store, and pub. NC Node C has a gas station and convenience store, a recently opened dental practice and another freestanding retail pad development under construction (**Figure 5-32**).

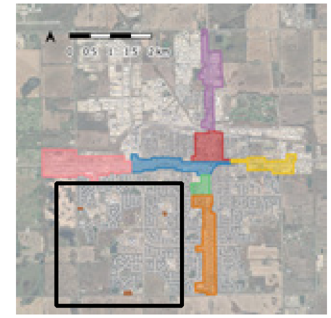


Figure 5-30. Neighbourhood Commercial Nodes
(Source: FBM)

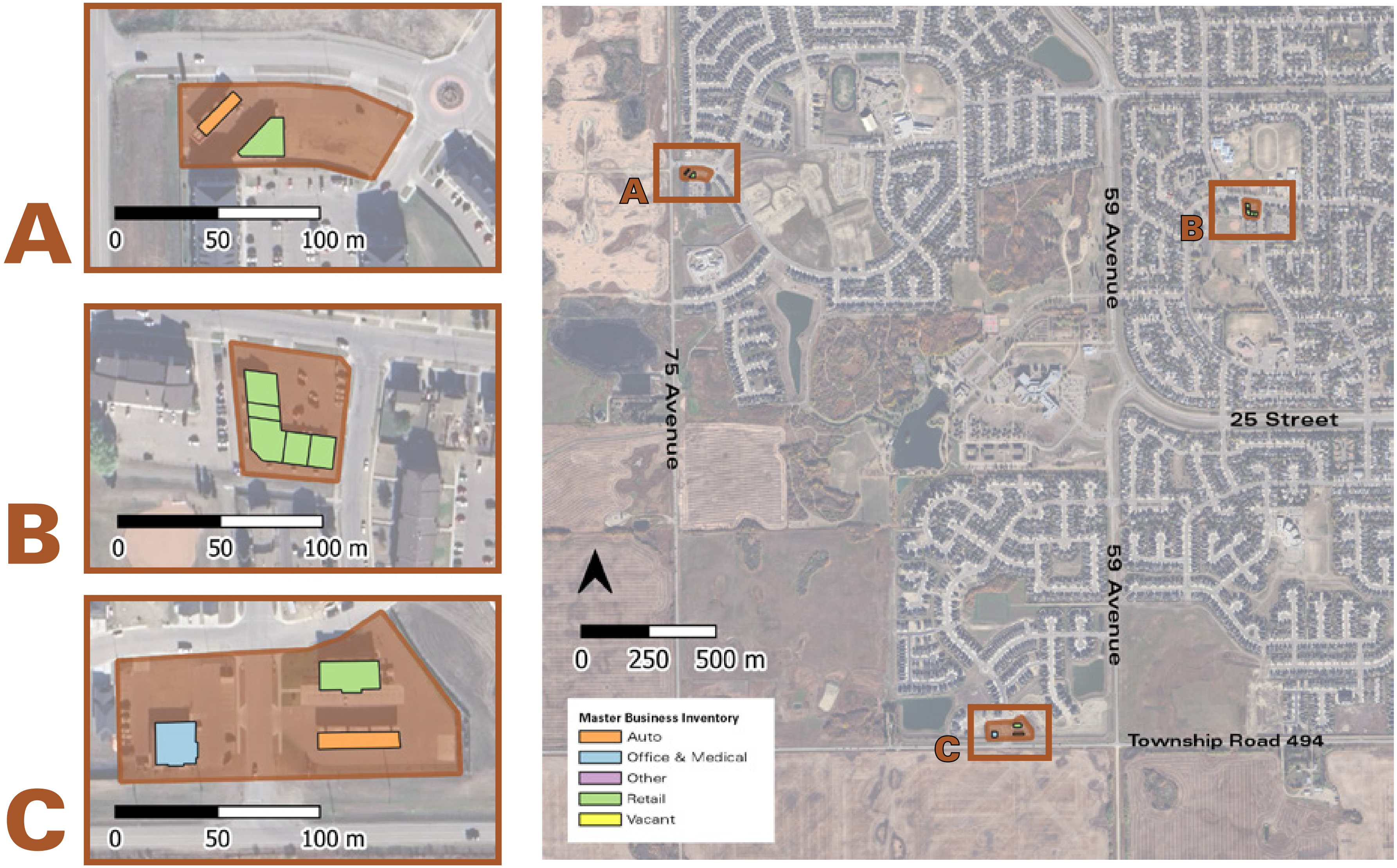


Table 5-19. Neighborhood Commercial Node Local versus Brand Summary
(Source: FBM)

total RETAIL ONLY			
19,131	Local	5	7
	Brand	2	
business count	Local	71%	
business count	Brand	29%	
floorspace	Local	11,453	19,131
floorspace	Brand	7,678	
floorspace	Local	60%	
floorspace	Brand	40%	
	Avg Local Size	2,291	2,733
	Avg Branded Size	3,839	

The NC Nodes are the only nodes where local business numbers are currently higher than brand in terms of both count and floorspace (5 local (60%) versus 2 brand (40%) (**Table 5-19**). Their top merchandise category is Grocery, Convenience and Specialty Food (attributable to convenience stores) at 7,678 sf, as shown in **Table 5-20**. These small nodes are the only nodes with 0% vacancy at the time of writing.

Figure 5-31. Neighbourhood Commercial Node A, 7401 34 Street

Table 5-20. Neighborhood Commercial Nodes Inventory Summary
(Source: FBM)

MERCHANDISE CATEGORY	NEIGHBOURHOOD COMMERCIAL FLOORSPACE (sq. ft.)	NEIGHBOURHOOD COMMERCIAL MIX (%)
GROCERY, CONVENIENCE & SPECIALTY FOODS	7,678	26.8%
PROFESSIONAL, MEDICAL & FINANCIAL	4,511	15.7%
PERSONAL SERVICE	4,111	14.3%
QUICK SERVICE F&B	3,448	12.0%
TOYS & HOBBIES	2,705	9.4%
ALCOHOL, TOBACCO & CANNABIS	1,188	4.1%
FASHION & FOOTWEAR	0	0.0%
AUTO SERVICE	0	0.0%
VACANT	0	0.0%
FULL SERVICE RESTAURANTS & PUBS	0	0.0%
SPECIALTY RETAIL	0	0.0%
BEAUTY & WELLNESS	0	0.0%
HOME FURNITURE & DÉCOR	0	0.0%
AUTO PARTS & ACCESSORIES	0	0.0%
PHARMACY	0	0.0%
FITNESS & LEISURE	0	0.0%
HOME IMPROVEMENT & GARDENING	0	0.0%
SPORTING GOODS & OUTDOOR RECREATION	0	0.0%
JEWELRY & ACCESSORIES	0	0.0%
ELECTRONICS & APPLIANCES	0	0.0%
BOOKS, MEDIA & COMPUTERS	0	0.0%
ARTS & ENTERTAINMENT	0	0.0%
AUTO/RV/MOTORSPORTS DEALERSHIP	0	0.0%
TOTAL	**28,699**	**100.0%**
Retail Floorspace Excluding Non-Retail (Professional/Medical/Tourism/Light Industrial/Auto Service/VACANT)	**19,131**	**67%**
Total Estimated Retail Sales Excluding Non-Retail (Professional/Medical/Tourism/Light Industrial/Auto Service/VACANT)	**$5,790,254**	
Estimated Retail Sales Productivity ($/sf)	**$303**	

6.0 Community Survey

6.1 Introduction

Engagement is an essential component of the study process. For this project, engagement involved interviews with stakeholders and an online community survey. This section summarizes key emerging themes specifically from the Community Survey, highlighting the implications for Lloydminster's retail market.

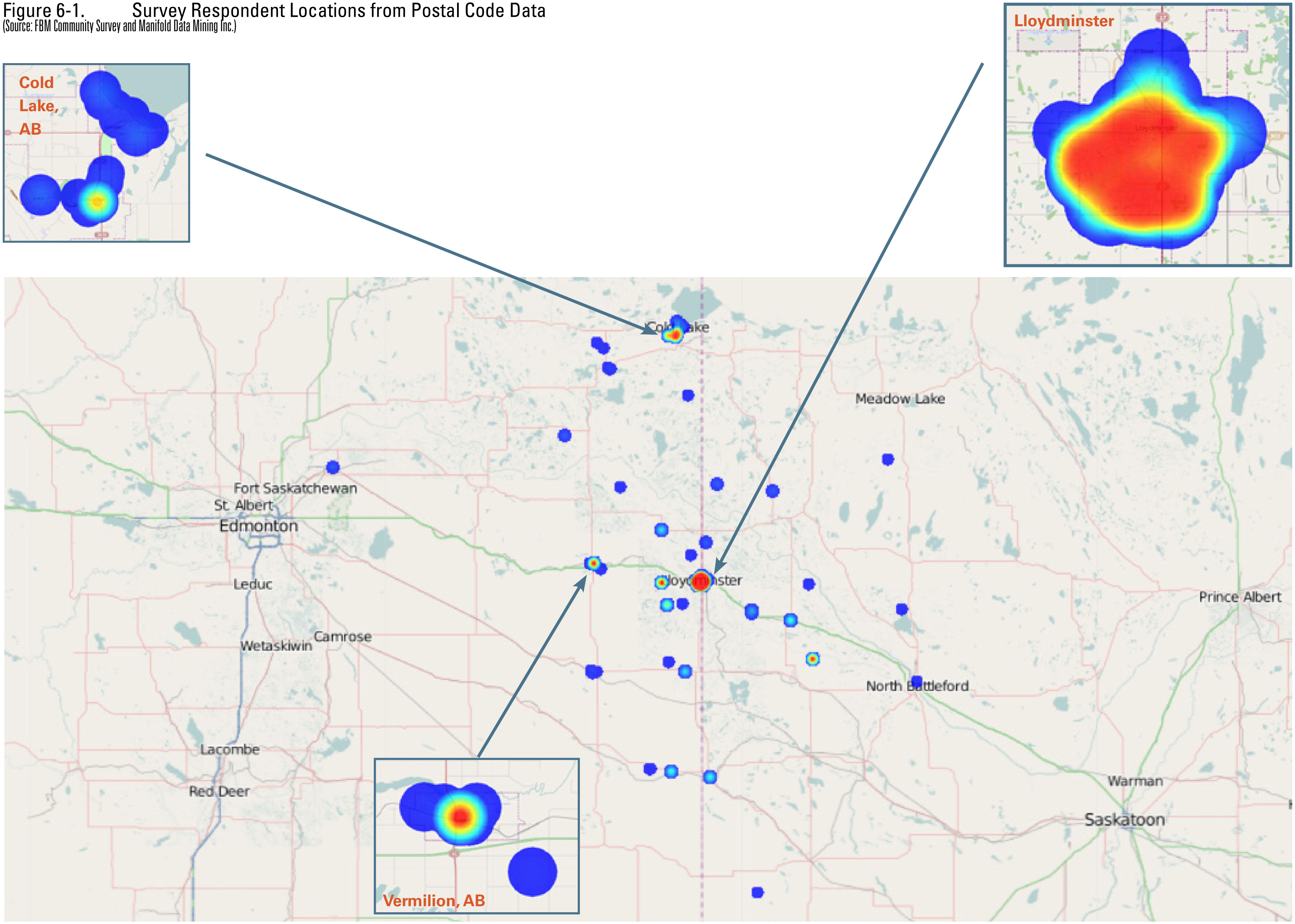
6.3 Community Survey

An online survey of residents and non-residents in Lloydminster was conducted to further inform this analysis. The goal of the survey was to understand perspectives and habits around shopping in Lloydminster.

The survey posted on the City's website received a significant response rate with 729 responses from June 1 until July 10, 2022: 574 responses were from Lloydminster residents (with two duplicates removed) and 155 from non-residents. **Figure 6-1** is a heat map showing the general location of respondents' home postal codes provided during the survey process. As shown in **Figure 6-1**, most respondents were from Lloydminster while a strong representation of non-residents came from the communities of Cold Lake and Vermilion in Alberta. This distribution of responses further supports the Primary and Secondary Trade Area boundaries detailed in Section 4.0.

The following section summarizes the survey findings and offers key take aways for the Lloydminster retail market. Survey questions and results, including detailed charts and tables, can be found in **Appendix A and B**.

Figure 6-1. Survey Respondent Locations from Postal Code Data
(Source: FBM Community Survey and Manifold Data Mining Inc.)



6.3.1 Travel and Shopping in Lloydminster

For day-to-day conveniences (such as groceries), residents showed a clear preference for Lloydminster, with 564 of 574 identifying Lloydminster as their preferred convenience shopping place. When it comes to the distance they are prepared to travel for day-to-day conveniences, 54% want to travel less than 10km; 37% 10 to 30km; 4% 30-75km or more than 150km (each); and only 1% were prepared to travel 75-150km. The slight increase in willingness to drive more than 150km compared to 75-150km may reflect the draw of farther away major urban centres.

The community of choice for residents buying big ticket items was slightly more varied. Lloydminster was still the clear leader at 54% but Edmonton was not far behind at 34%. The rest lagged far behind, with 6% preferring online shopping, 4% Sherwood Park, and 1% either Saskatoon or Other.

The only question posed to just non-residents in the survey regarded the frequency with which they use shops and services in Lloydminster. Almost half come every week (49%), about a quarter every month (26%), and just under a quarter daily (21%). Only 5% of non-resident respondents said yearly. These results suggest a very active trade area population beyond the city residents.

Overall, responses to these questions about how travel preferences relate to shopping habits show that the community in and around Lloydminster has a strong interest in shopping in Lloydminster.

6.3.2 Most Popular Shopping Nodes

The survey asked both residents and non-residents their preferred shopping areas within Lloydminster. What is now called the Power Centres Node (referred to as East and West 70 Station in the survey) was clearly the most popular among both groups of respondents, being first choice for 60% of residents and 70% of non-residents. The area surrounding Lloyd Place Mall is second most popular at 30% for residents and 21% for non-residents. Coop Marketplace was first choice for 7% of residents, and 4% of non-residents. The other nodes - notably the Downtown node - were much less popular among both sets of respondents.

Responses to the "other comments" question offer nuance around preferred shopping areas in the City, particularly for Lloyd Mall and the Downtown (see sample quotes below). There are perceptions of high vacancy all over the city, but especially in Lloyd Mall itself (multiple said it is "empty"). The Lloyd Mall (not the node) was perceived as lacking variety, having lost many valuable stores, and several identified the notable lack of a true food court. Comments about Downtown made it clear why it was so unpopular among respondents, criticized for being empty but also perceived as feeling unsafe and very difficult for parking.

Survey Quotes re: Downtown and Lloyd Place Mall

"Lloyd Mall could be so much better. We need a toy store, a decent baby and maternity store. We need a food court in it."

"The mall used to be great! What happened?"

"Parking downtown is awful. I would shop and support downtown more if I knew I had a parking spot every time."

"... no one goes down town anymore, it's not safe."

"Downtown seems like it's getting emptier and emptier..."

6.3.3 Missing Shops and Services

Respondents offered many insights into the gaps in Lloydminster's commercial offerings. **Figure 6-2** shows the types of shops and services missing in Lloydminster according to residents. The results make a clear statement: respondents want more clothing and footwear stores almost twice as often as they want anything else. Both non-residents and residents provided more details about the need for more clothing and shoe stores through their answers to the closing "other comments" question: several respondents noted a lack of moderately-priced clothing stores, while multiple others identified a need for more nonstandard size options (i.e., petite and plus sizes). The comments made it clear residents are looking for more clothing options for every age group, from babies/maternity (4 mentions), children and youth (19), through men (16) and women (10), and to seniors (3).

Survey Quotes re: Clothing & Shoe Store Gaps

"There are no mid-range clothing and shoe shopping options for anyone. You have cheap, like Walmart. And then far too expensive like Hot Peppers. I travel to Edmonton for this type of shopping."

"I find there is a huge lack of inclusive sizing for both men and women."

"There is a major gap in things for young families and children. Children clothing stores are SEVERELY lacking as are sizes available because they are often sold out."

Respondents elaborated on their answers regarding gaps in shops/services in the other comments answers. For the need for more grocery options, two respondents called for a grocery store on the south side of the city closer to where most people live. Another requested a small grocer in Downtown and another an Asian grocer. More restaurants, especially higher end and full-service family restaurants, along with more doctors and health care services were popular suggestions as well. A need for more options to occupy children, youth and adults is clear from the Arts & Entertainment and Sporting Goods & Recreation findings in **Figure 6-2**, with several respondents specifically requesting a trampoline park, an indoor play place, and a bigger pool. Multiple comments include a desire for more local, unique shops and services, especially coffee shops.

Survey Quotes re: Grocery, Recreation, & Local Store Gaps

"[…] the city is really lacking thing[s] for people to do. No Play centre's or trampoline parks for kids and no bus service for people[…]"

"I have [a number of] kids and feel it is very difficult to find a place to go for attractions or activities and fun for the kids. You can only go to the movies, swimming (we seriously need a bigger pool) or find any attractions that we have not been too a ton of times before. We often frequent the bowling alley, pool, mini golf, and theater but more options would be a huge deal for our family."

"Would like to see less big name company chain stores and more unique, independent shops (especially coffee shops) to offer a better variety of goods and services."

Figure 6-2. Missing Shops and Services from Resident Respondents
(Source: Lloydminster Community Survey conducted by FBM, 2022)

Table 6-21. Missing Tenants from Resident Respondents
(Source: Lloydminster Community Survey conducted by FBM, 2022)

Tenant Name	Mentions
Costco	124
Old Navy	39
Bed, Bath & Beyond	5
Lululemon	5
Children's Place	4
RW&CO.	4
Value Village	4
Cabela's	3
Designer Shoe Warehouse	3
H&M	3
London Drugs	3
Toys"R"Us	3
Dynamite	2
Eddie Bauer	2
Marshalls	2
Moore's	2
Northern Reflections	2
Save-On-Foods	2
Soft Moc	2
The Bay	2

Survey Quotes re: Costco

"We need a Costco!!!"

"I'd love to see a Costco in town. Then probably 100% of my shopping would be here"

"If we had a Costco, we would do zero shopping anywhere else. When we do travel to Costco which is once a month, we do other shopping such as clothing etc, which if we never left Lloyd would not do."

6.3.4 Missing Shops and Services: Costco

Residents and non-residents primarily used the other comments section to share stores they wish would come to Lloydminster, both general types and specific named businesses. We compiled these wish lists in the Appendices and have included one of the tables that tallies the most requested tenants by name here in **Table 6-21.**

Costco was overwhelmingly most wanted with 47% of the 265 residents and non-residents who answered this question requesting Costco. Stated reasons to bring Costco to town included adding jobs, attracting more business, and rising fuel prices impeding travel to Costco's elsewhere, but another notable reason was that the lack of a Costco was the reason multiple respondents ever leave Lloydminster, as seen in the sample quotes. Support for Costco was even more enthusiastic among non-residents with 48 of 77 (62%) non-residents mentioning Costco versus 76 of 188 (40%) residents. Only one respondent said they did not want Costco because it would beat out local businesses, while many said Costco would draw in more shoppers who would then spend more money at other nearby businesses.

Other top requested stores align with finding that the community is looking for more clothing stores, especially those offering a wide range of sizes and styles for the whole family (e.g., Old Navy, Children's Place) along with affordable prices (e.g., Value Village). Though certainly less popular than Costco, many respondents request Old Navy and some who knew it was coming to the city expressed excitement.

6.3.5 Why (and Why Not) to Shop in Lloydminster

The survey asked both sets of respondents about their primary reason for visiting shops and services in Lloydminster. The most frequently noted reason for those who call Lloydminster home was by far the fact that they live there (64%). The not-very-close second most frequently mentioned was working or owning a business in the area at 21%. Visiting for a specific retailer or business was notably low for residents at 8%, as were recreation/leisure (4%) and accessing hospital or medical services (3%).

Non-residents' reasons for visiting were more evenly distributed, with 38% visiting for a specific retailer/business, 22% because they live in the area, 15% for recreation/leisure, 14% working or owning a business, 9% accessing the hospital or medical services, and 2% giving other reasons. The findings suggest Lloyd's location is important to both residents and non-residents. They also suggest that their current retail offerings are attractive to those who live outside the City.

The survey also asked what reasons lead residents and non-residents to shop elsewhere. In other words, why NOT Lloyd? Missing specific merchandise was the top reason for residents (31%) and the second reason for non-residents (22%), while missing a specific retailer was first for non-residents (31%) and second for residents (26%). After that, residents identified cost of goods and services as the third most popular deterrent (18%), which was fifth for non-residents (10%). This suggests residents perceive businesses and products to be slightly more expensive than other options when compared to the perception of those living outside the city.

The third most common response to this question from non-residents is N/A, of interest because it indicates a good portion (13%) did not feel Lloydminster's shopping lacked in any particular way. Only 3% of residents responded N/A, which suggests that non-residents have a more positive perception about shopping in Lloydminster than residents. Hours of operation was the fourth most common reason not to visit for both groups, though a distant fourth for residents (7%) and a slightly closer 4th for non-residents (rounded to 13% though it received one less vote than "N/A" response). Customer service was given slightly more often for Lloyd residents at 7% and 4% for non-residents. The following remaining reasons not to visit Lloyd received relatively less votes than the above (4% or less among both groups): convenience/ traffic (residents only), parking, cleanliness, safety, and "other".

6.3.6 Perceptions about Shopping in Lloydminster

A few other themes of interest emerged from our analysis of the other comments responses, some of which are demonstrated in the sample quotes included here. While many were generally positive about the shopping scene in Lloyd, multiple perceived quality, variety, and prices to be better in Edmonton or online. Several respondents called for a need to fill vacant retail spaces before building new commercial developments. A perceived barrier to filling these vacancies in the City, especially in Lloyd Mall, were high costs of leasing retail spaces. Expensive lease rates was a perceived barrier particularly for small, new, or local businesses. Online shopping was mentioned several times as being chosen for specialized products and for affordability. Finally, a need for transit came up among multiple respondents.

Survey Quotes re: Online Shopping & Vacancy

"I'm a big advocate of shopping local but online shopping is very convenient for clothing. We do have local retailers but I find online clothing to do more affordable."

"Encourage businesses to open in vacant spaces rather than building more commercial developments."

"I would like to see more use of empty buildings instead of building in new land. It's hard to get to places in the winter without a car"

6.3.7 Resident Spending Habits

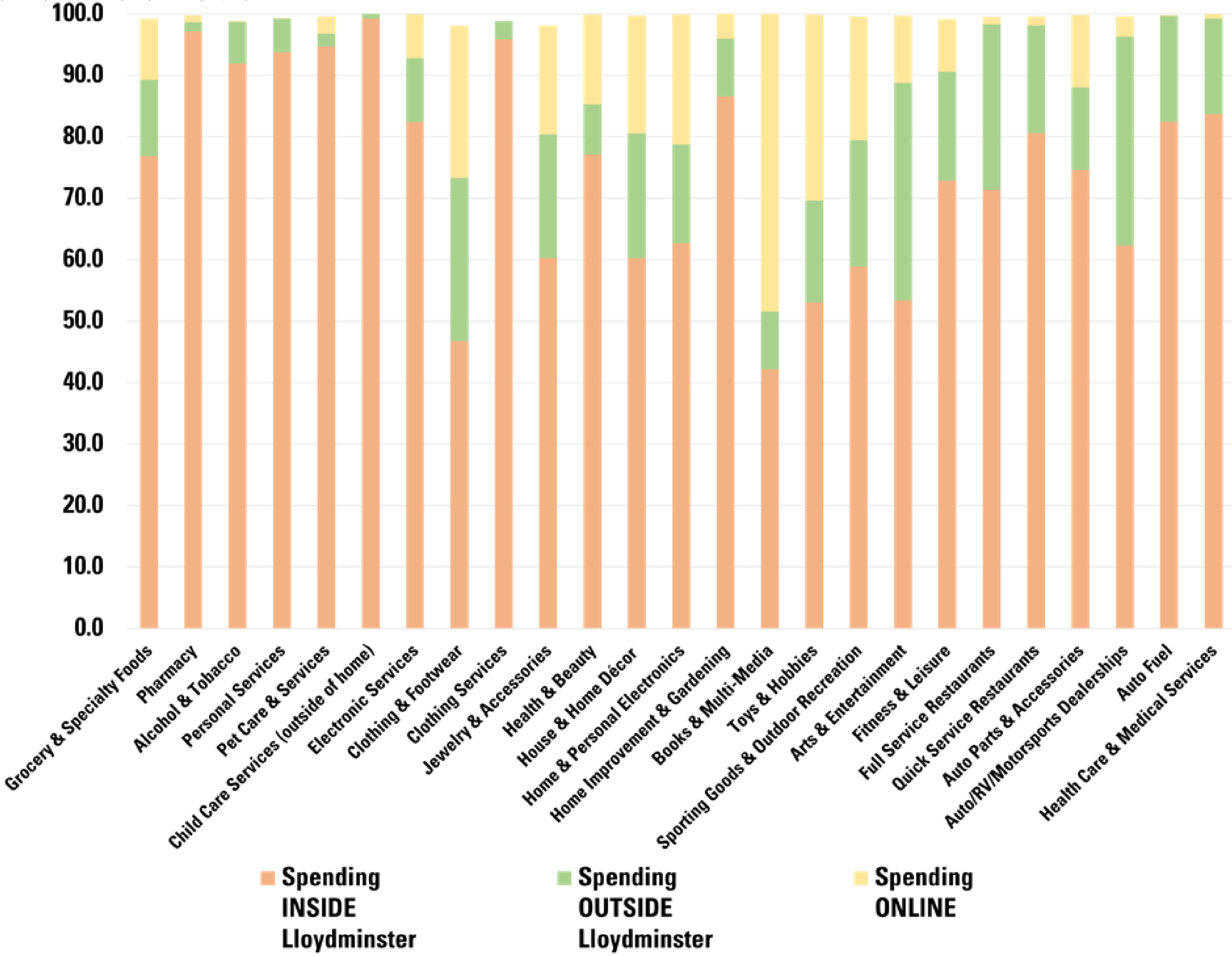
To understand how Lloydminster residents choose to spend their money, we asked them to estimate what percent of their household spending was spent inside the City, outside the City, or online depending on the product or service type. A total of 556 (of 574) residents provided responses to these questions and the findings are summarized in **Figure 6-3**.

The responses, which were predominantly local residents shows a high propensity to shop local for their day-to-day convenience goods and services. They also are increasingly spending more discretionary dollars online with categories such as Clothing & Footwear, Books & Media and Toys & Hobbies being identified as dominant categories. Across almost all segments, the level of online shopping or e-commerce is increasing and this is putting pressure on the retail market where "showrooming" can occur; a trend whereby customers will visit a store to view the product in person, but ultimately purchase the product, not necessarily from that same retailer. This is particularly the case in non-fashion categories. While e-commerce will continue to impact spending and purchasing, the need and desire for physical retail stores won't go away, and those retailers that adapt to omni-channel retail will have a better chance to benefit from this change in consumer purchasing patterns.

6.3.8 Key Take Aways

Overall, respondents show that they want to be able to live and thrive in Lloydminster and that they care about shopping locally. They showed a general level of expectation that they should be able to access everything they need within the city itself, without having a travel elsewhere. Lloydminster has room to grow its retail market based on this community feedback.

Figure 6-3. Household Spending Breakdown from Community Survey
(Source: Lloydminster Community Survey conducted by FBM, 2022)



7.0 Retail Demand Analysis

7.1 Introduction

The following section will assess the amount of supportable retail floorspace in the City of Lloydminster justified by the present Trade Area (Primary + Secondary) and premised on estimates of the current market share of total available retail spending by the existing primary and second trade areas and miscellaneous spending. This process will forecast demand in terms of both floorspace (square footage) and land (acres) to provide a basis for future land use planning in Lloydminster.

7.2 Demand Methodology

As is typical in most urban market scenarios, forecasting retail demand is largely predicated and have a close correlation with population growth and the inherent opportunities that would naturally come from a growing trade area as presented in Section 4.0.

With this understanding of the retail market dynamic and population growth and the results of the consumer survey, the key to forecasting new floorspace demand must not just look at traditional demand drive by population growth, but rather look at the notion of achieving a greater market share of the existing trade area spending for categories that represent strength today or may similarly be lacking or needed. In particular, as will be shown, this greater market share will apply to the local and surrounding trade area, given what seems to be a below average retention of household retail spending.

From FBM'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 Lloydminster's retail businesses are generating. By dividing the total Trade Area retail spending potential into the category-specific retail sales productivity estimates (measured in $ psf), the estimated market share figures could be calculated from which a measure of supportable floorspace can be determined.

While the figures from the Consumer Survey showed a relatively strong depiction of market share, this figure is from the predominantly city resident respondents. This is important because Lloydminster's retail market as noted is much larger than just the local resident base, which is why the current market share capture of the Primary and Secondary Trade Areas combined (or Total Trade Area) is lower than for the city residents alone who responded to the survey.

7.3 Demand Based on Maintaining Current Market Share

In order to understand what magnitude of market share is achievable, the first step is to quantify what the current marker share actually is, or is estimated to be.

To illustrate a baseline as-is impact on future demand for Lloydminster, **Table 7-1** and **Table 7-2** document the amount of future demand that would be possible based solely on the status quo of maintaining the current estimated market shares of Total Trade Area retail spending potential.

Current market shares are actually highest for Leisure, Recreation and entertainment Goods/Services which is further supported by healthy market share in retail categories like Sporting Goods, Toys and Hobbies and Specialty Retail. These figures are emblematic of Lloydminster's regional appeal. Conversely, because residents tend to shop closer to home for conveniences and because the Trade Area is rather large, the current market share of Convenience and Day-to-Day Goods/Services is lower. This doesn't mean that the local grocery businesses do not garner strong support, because they do as indicated in the survey responses, but it does suggest that a larger warehouse or destination grocery retailer like a Costco could significantly improve this market share without impacting local grocery operators to a significant degree.

With the opening of a much larger Canadian Tire, this too will act as a magnet for further increased market penetration of the more distant Trade Area segments.

The result of an examination of current market shares reveals that **by 2031, Lloydminster could support an additional 571,749 sf of retail space** (excluding Auto categories). Existing vacant space could absorb as much as 58% of the future demand resulting in **238,186 sf of new space**. More realistically, current vacancies could accommodated approximately 150,000 to 200,00 sf resulting in net new demand in the range of 370,000 to 420,000 sf.

Table 7-1. Estimated Retail Demand by **2031** Based on **Maintaining** Current Market Share

(Source: FBM & Manifold Data Mining Inc)

Retail Spending by Merchandise Category		2031				2021 to 2031	
		LLOYDMINSTER Sales Productivity ($psf)	LLOYDMINSTER Estimated Market Share	Market Share Sales $	Current Retail Floorspace (sf)	Current Retail Inventory (sf)	Total Cumulative NEW Floorspace Demand (sf)
Convenience & Day-to-Day Goods/Services	Grocery, Convenience & Specialty Foods	$525	28%	$218,795,906	75,179	341,248	75,179
	Pharmacy	$520	36%	$26,426,096	8,846	41,995	8,846
	Alcohol, Tobacco & Cannabis	$521	38%	$59,186,155	19,935	93,720	19,935
	Personal & Home Services	$240	24%	$27,246,835	19,994	93,719	19,994
	Health Care & Medical Services						
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Footwear	$303	54%	$96,871,587	57,093	262,311	57,093
	Jewelry & Accessories	$322	29%	$7,707,305	4,241	19,718	4,241
	Beauty & Personal Care	$420	62%	$47,176,350	19,863	92,512	19,863
	Furniture & Décor	$211	39%	$36,188,083	30,336	141,109	30,336
	Appliances & Electronics	$291	21%	$31,306,758	18,758	88,919	18,758
	Home Improvement & Gardening	$203	35%	$91,540,120	79,392	372,069	79,392
	Books, Media & Computers	$105	1%	$1,396,192	2,346	10,964	2,346
	Sporting Goods	$226	70%	$22,476,619	17,615	82,051	17,615
	Toys & Hobbies	$196	56%	$14,292,874	12,716	60,144	12,716
	Specialty Retail	$227	60%	$45,126,273	35,439	163,494	35,439
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	$516	56%	$95,886,813	34,216	151,661	34,216
	Restaurants & Pubs	$419	41%	$73,916,013	32,450	143,752	32,450
	Arts & Entertainment	$183	156%	$19,368,683	18,644	87,036	18,644
	Fitness & Leisure	$125	48%	$13,152,584	18,390	86,754	18,390
Automotive Goods (excluding repair)	Auto Parts & Accessories	$373	33%	$60,650,376	29,211	133,526	29,211
	Auto/RV/Motorsports Dealership	$300	13%	$63,878,792	37,084	175,846	37,084
	Auto Fuel						
	TOTAL RETAIL CATEGORIES ONLY	**$327**	**37.9%**	**$1,052,590,416**	**571,749**	**2,642,548**	**571,749**
	TOTAL (excluding Auto)	**$327**	**45.2%**	**$928,061,247**	**505,454**	**333,563** VACANT	**238,186**

Specific categories that would be supportive of growth could include Home Improvement & Gardening at 79,392 sf and Grocery & Conveniences at 75,179 sf and Fashion& Footwear at 57,093 sf.

It is worth noting that categories like Arts & Entertainment exceed a 100% market share which is because of the Casino and this suggests that the spending and/or the extent of the target audience exceeds even the trade area shown. Gaming spending is often a challenging figure for which to be precise as often times this figure is understated in Municipal Census Surveys.

Estimated retail demand for 2021 to 2031 based on maintaining current market share is further presented in **Appendix C: Detailed Retail Demand Tables**.

Table 7-2. Estimated Retail Demand Summary **2021 to 2031** Based on **Maintaining** Current Market Share
(Source: FBM)

Retail Merchandise Category	2021	2026	2031	2021 to 2031	
	Current Floorspace Supply (sf)	Cumulative NEW Floorspace Demand (sf)	Cumulative NEW Floorspace Demand (sf)	Current Retail Inventory (sf)	Total Future NEW Demand (sf)
Convenience & Day-to-Day Goods/Services	570,682	68,199	123,954	570,682	123,954
Comparison or Department Store Type Merchandise (DSTM)	1,293,291	151,429	277,799	1,293,291	277,799
Leisure, Recreation & Entertainment Goods/Services	469,203	57,675	103,701	469,203	103,701
Automotive Goods (excluding repair)	309,372	36,089	66,295	309,372	66,295
Total (sf)	**2,642,548**	**313,392**	**571,749**	**2,642,548**	**571,749**

7.4 Demand Based on Increased Market Share

Although current market shares have been sufficient to justify Lloydminster's growth as a regional retail destination, it is evident that an increased market share could be achieved if new strategically targeted retailers were introduced as well as the opening of the larger Canadian Tire location.

An approach to increasing market shares was applied in **Table 7-3** and summarized in **Table 7-4** and revealed that if market shares for the Grocery, Convenience & Specialty Foods were increased from current levels of around 28% of Total Trade Area spending to a reasonable 35% of Total Trade Area spending, the benefit could result in demand for an additional 170,615 sf of new floorspace demand by 2031. Combined with growth in market share of other Convenience & Day-to-Day Good/ Services categories, the total of this aggregated cluster could be 268,661 sf.

Similarly, as summarized in **Table 7-4,**if only marginal increases in market share were to be garnered by Comparison or DSTM categories or Leisure & Entertainment categories over the next decade to 2031, the resulting impact could be demand for an additional 365,935 sf and 135,856 sf of demand respectively.

In total, **Table 7-3 and Table 7-4** provide a forecast of future demand in terms of floorspace based on applying an increase from 45.7% overall market share across all non-automotive categories today to 50.3% by 2031.

The result of this forecast reveals that **by 2031, Lloydminster could support an additional 966,701 sf of retail space** (excluding Auto categories). With this increased demand, existing vacant space could absorb 35% of the future demand resulting in **633,138 sf of new space**.

As with the current market share approach, it is not realistic to suggest that all present day vacant space would be able to absorb new demand, but if as outlined previously approximately 150,000 to 200,000 of the vacant space was absorbed by new demand, then the net new build required to accommodate demand could be in the range of 766,000 to 816,000 sf. There may be certain challenges associated with meeting demand at this level, such as employment and overall tenant demands.

Based on the above increased market share scenario and the above noted challenges, as well as the current market share, the likely future demand is reasonably likely to fall somewhere in this range. Accordingly, this study summarizes demand for new space by the year 2031 as within the range of:

	Current Market Share	Increased Market Share
Retail Demand	571,749 sf	966,701 sf
Est. Vacancy Factor	150,000 to 200,000 sf	150,000 to 200,000 sf
Net New Demand	370,000 to 420,000 sf	766,000 to 816,000 sf

As an oder of magnitude, it would be reasonable to forecast that demand could fall in the range of 500,000 to 600,000 sf.

As a secondary test to this approach, a simple retail space per capita application against future Trade Area population growth could be used. Over the period 2021 to 2031 the Total Trade Area population is forecast to increase by just over 20,000, a large share of which would fall within the local Lloydminster catchment. If applying an industry standard retail space per capita ratio range of 20 to 30 sf, the resulting demand could be 405,000 sf to 607,000 sf. This figure aligns with the more detailed market share methodology.

Estimated retail demand for 2021 to 2031 based on increasing market share is presented in **Appendix C: Detailed Retail Demand Tables**.

Table 7-3. Estimated Retail Demand by **2031** Based on **Increased** Market Share

(Source: FBM & Manifold Data Mining Inc)

		2031				2021 to 2031	
	Retail Spending by Merchandise Category	LLOYDMINSTER Sales Productivity ($psf)	LLOYDMINSTER Estimated Market Share	Market Share Sales $	Current Retail Floorspace (sf)	Current Retail Inventory (sf)	Total Cumulative NEW Floorspace Demand (sf)
Convenience & Day-to-Day Goods/Services	Grocery, Convenience & Specialty Foods	$525	35%	$268,939,385	170,615	341,248	170,615
	Pharmacy	$520	45%	$33,291,691	22,055	41,995	22,055
	Alcohol, Tobacco & Cannabis	$521	40%	$61,715,936	24,793	93,720	24,793
	Personal & Home Services	$240	30%	$34,723,656	51,198	93,719	51,198
	Health Care & Medical Services		0%	$0			
				$0			
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Footwear	$303	60%	$108,188,977	94,409	262,311	94,409
	Jewelry & Accessories	$322	30%	$8,012,763	5,191	19,718	5,191
	Beauty & Personal Care	$420	65%	$49,447,378	25,272	92,512	25,272
	Furniture & Décor	$211	40%	$37,173,254	35,004	141,109	35,004
	Appliances & Electronics	$291	25%	$37,447,202	39,877	88,919	39,877
	Home Improvement & Gardening	$203	35%	$92,218,033	82,735	372,069	82,735
	Books, Media & Computers	$105	1%	$2,535,470	13,206	10,964	13,206
	Sporting Goods	$226	70%	$22,476,024	17,613	82,051	17,613
	Toys & Hobbies	$196	60%	$15,403,928	18,380	60,144	18,380
	Specialty Retail	$227	60%	$44,856,196	34,248	163,494	34,248
				$0			
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	$516	60%	$103,605,798	49,180	151,661	49,180
	Restaurants & Pubs	$419	45%	$81,282,174	50,010	143,752	50,010
	Arts & Entertainment	$183	156%	$19,321,086	18,384	87,036	18,384
	Fitness & Leisure	$125	48%	$13,139,080	18,282	86,754	18,282
				$0			
Automotive Goods (excluding repair)	Auto Parts & Accessories	$373	35%	$63,808,677	37,686	133,526	37,686
	Auto/RV/Motorsports Dealership	$300	20%	$100,322,507	158,563	175,846	158,563
	Auto Fuel						
	TOTAL RETAIL CATEGORIES ONLY	**$332**	**43.1%**	**$1,197,909,217**	**966,701**	**2,642,548**	**966,701**
	TOTAL (excluding Auto)	**$333**	**50.3%**	**$1,033,778,032**	**770,452**	**333,563**	**633,138**
						VACANT	

Table 7-4. Estimated Retail Demand Summary **2021 to 2031** Based on **Increased** Market Share
(Source: FBM)

Retail Merchandise Category	2021 Current Floorspace Supply (sf)	2026 Cumulative NEW Floorspace Demand (sf)	2031 Cumulative NEW Floorspace Demand (sf)	Current Retail Inventory (sf)	Total Future NEW Demand (sf)
Convenience & Day-to-Day Goods/Services	570,682	201,291	268,661	570,682	268,661
Comparison or Department Store Type Merchandise (DSTM)	1,293,291	232,464	365,935	1,293,291	365,935
Leisure, Recreation & Entertainment Goods/Services	469,203	87,250	135,856	469,203	135,856
Automotive Goods (excluding repair)	309,372	155,606	196,248	309,372	196,248
Total (sf)	**2,642,548**	**676,611**	**966,701**	**2,642,548**	**966,701**

7.5 Demand Allocation

As documented previously, the amount of forecast retail demand can be variable depending upon whether Lloydminster is able to garner continued levels of Trade Area market share spending, or if it is able to garner and increase share of Trade Area spending.

The result can result in demand forecast over the next decade of between 571,749 sf to 966,701 sf. Not all of this demand has to, nor should it be accommodated in new greenfield development as this would run the distinct risk of creating an over-retailed market and also make tenant/retailer attraction challenging. Growing market would though however present more opportunity for expansion and support of retail, particularly in areas like the Lakeside and Wigfield ASPs.

Rather, the most pragmatic approach to accommodating demand is to look within a large component of existing zoned lands and properties where vacancies exist, thereby reducing the pressure to create unnecessary surplus zoned land or even require further annexation.

To illustrate how the demand could be accommodated in the City's existing commercial lands, **Table 7-5** provides a land use allocation. The purpose of this land allocation is show how land utilization factor also known as Floor Area Ratio (FAR) can consider occupying existing vacancies, intensification and infill of existing zoned land, and new greenfield/brownfield development where applicable and compatible.

For example, when looking at the respective nodes, the following observations can be considered:

Downtown Node - There is not expected to be considerable need, nor is there a considerable amount of land available other than smaller vacant infill lots or that which may come from redevelopment, which could create more efficient use of existing land. Therefore, the resulting land utilization factor would be closer to 1.0 meaning that there should not be a need for surface parking or if there is parking it may be accommodated in a level below grade.

The key to Downtown's recovery is promoting and enabling mixed-use development formats that include retail on the street frontage and either residential or commercial above, particularly within the more compact core of the Downtown. In more peripheral parts of the Downtown it would be advised to only permit residential not commercial on the street level. This would avoid unnecessarily creating competitive space.

The total commercial mix could be in the range of 28,000 to 50,000 sf and only approximately 1 ac of more efficient, higher quality and therefore leaseable space.

Lloyd Mall Node - The mall itself has a large number of vacancies that could already accommodate a fair share of the approximate 57,000 to 97,000 sf of floorspace demand. Additionally, other properties like the vacancy beside The Brick should play a role. In terms of bare land, there are still out parcels available in Choice REIT's property. On this basis, very limited amount of new land in the range of 1.5 to 2.5 ac would be required in the Lloyd Mall Node to accommodate a fair share of future retail demand.

The Lloyd Mall may also consider further intensification of its surplus surface parking for further parcels of multi-unit CRU space to mirror that which is occurring on the Choice REIT neighbouring property.

Gold Horse Casino Node - Although on the Saskatchewan side of the City and opposite to the area of most significant recent retail development, this node represents a strategic opportunity to accommodate a more than fair share of future demand within the Wigfield ASP. The destination draw of the Casino, along with the future relocation of the arena will create an opportunity to provide retail development that could service east side residents, but also provide a compelling draw for residents further away in North Battleford, Cold Lake or Meadow Lake. One of the challenges of the node is the presence of the Husky "blast zone" which limits the amount of residential development in the area.

That said, a retailer like Costco could be pursued for this area as they are not as reliant on a directly proximate population base and they do draw regionally. This regional play could work well with the Casino and new arena, in a similar way that Costco's location in West Edmonton benefits from its proximity to the River Cree Casino while residential growth is predominantly only to its east. The impact of having a possible Costco in the east side of Lloydminster could work to balance retail as well as traffic on the very busy west side of the city along Highway 16. Additionally, Costco could help to catalyze supportive retail development.

Since this area is less developed, the need for land could be in the range of 11 to 22 ac in order to accommodate approximately 142,000 to 290,000 sf

Power Centres Node - This is the strongest retail node in the City and with the recent opening of the new, larger Canadian Tire, it is expected that the area will continue to be a big draw from compatible, mostly branded and new-to-market retailers. Examples of retailers that could be drawn to this area include the likes of London Drugs or Value Village and while Costco may consider this area, as noted they do not necessarily need the presence of the current anchors as much as other smaller junior box of smaller branded retailers.

In terms of future demand over the next decade it is reasonable to forecast that this will continue to be the dominant node and could accommodate between 200,000 sf (based on varying degrees of market share) and approximately 15 ac of land. There is currently a larger vacant land stock available on the north side of Highway 16, as part of the Hill Industrial ASP, which already has an access point and intersection alignment with opposite commercial. Additionally, internal access could be made available with a parallel internal road from RONA and Princess Auto. This area is recommended to be an area within which future commercial should be targeted. Other land further west pushing up against County land is also considered viable. The most important consideration for this area is to avoid continued sprawl if possible and focus on concentrating the retail more efficiently along this 'gateway' corridor.

Auto Cluster Node - As noted previously in the node overview, this cluster is older in look and feel, with the exception of the area immediately around the Servus Centre. Over time this area could benefit from a better intensification of land use, particularly if some of the auto dealerships were to relocate elsewhere. On this basis, the land utilization should strive to be higher than what it currently is and strategic, more dense infill developments should be pursued. This is why the overall need for new land is kept to a minimum along this corridor in favor of retail floorspace in the range of only 17,000 to 29,000 sf of new retail. The lands immediately south of the Auto Cluster Node, likely have commercial components, but these should be kept to a neighbourhood scale rather than anything larger.

Coop Marketplace Node - There is not likely to be much change in this area with respect to new retail or land. Recent developments behind Coop are a good use of land in terms of scale and appropriateness for a diverse range of businesses. The single biggest variable for this node is whether the current Coop, with its strong customer catchment and desire to expand would consider relocating to another node or area in the community or if it would consider expanding on site and thus better utilizing its existing lands. This would likely result in a loss in parking, but the shopping centre could be considered over-parked as it is and therefore consideration should be given to relaxing parking requirements if it were to enable expansion rather than relocation of the Coop.

North Industrial Node - As noted in the Northeast ASP, there is an opportunity to provide a small, compatible allotment of commercial or retail land as part of this ASP. The appropriate allocation could be in the range of 28,000 to 48,000 sf of mixed-commercial and business services requiring approximately 2 to 4 acres because of the vehicle dominant nature of the area and likely need to provide sufficient land for larger vehicles and circulation.

Neighourhood Nodes - Continued residential development, particularly in the west near to the Lakeland College or within the Lakeside ASP presents an opportunity for further community-scale retail development that could be in the range of 100,000 sf. Similarly, other future proposed residential communities south near the Servus Centre should also have a provision for smaller neighbourhood retail shops and services, also in the range of 15,000 to 20,000 sf.

In the case of the Lakeside ASP, the approved document indicates and allocation of approximately 37 acres for commercial land, which far exceeds the forecasted 10-year demand. That said, longer term growth for 20 plus years may grow into this, but caution needs to be practiced so as to not overbuild. One scenario that could benefit the community and be most compatible in terms of its local desirability and leasability for local businesses would be if a brand like Costco were to locate in the Gold Horse Casino node, then this might open the opportunity for Coop to expand and relocate in Lakeside to anchor the commercial and mixed-use development, in a way that a user like Costco is less likely to advocate or facilitate.

In Lloydminster, the current provision and locations of established grocery stores is appropriate for the size of Lloydminster, and should consider the potential impact that another market entrant could have on the existing distribution of grocery market share in the community. By having Coop relocate and expand, they would likely gain customers and provide a positioning that matches the residential development and resident buyer profile of the local area.

Table 7-5. Estimated Retail Lands Needs by **2031** Based on **Current** and **Increased** Market Shares
(Source: FBM)

Retail Node	Total 10-yr New Demand by 2031 with CURRENT Market Share (sf / acres)		Lloydmister % Share of Demand	Lloydmister Share of Demand (sf)	Lloydmister Land Utilization Factor	Lloydmister Net Land Area (acres)
Total	**571,749**	**35.4**	**100%**	**571,749**	**0.37**	**35.4**
Downtown			5.0%	28,587	1.0	0.7
Lloyd Mall (Hwy 16 Central)			10.0%	57,175	0.9	1.5
Gold Horse Casino (Hwy 16 East)			25.0%	142,937	0.3	10.9
Power Centres (Hwy 16 West)			35.0%	200,112	0.3	15.3
Auto Cluster (Hwy 17 South)			3.0%	17,152	0.7	0.6
Coop Marketplace (Hwy 17 Central)			2.0%	11,435	0.7	0.4
North Industrial (Hwy 17 North)			5.0%	28,587	0.3	2.2
Neighbourhood (incl Lakeside ASP)			15.0%	85,762	0.5	3.9

Retail Node	Total 10-yr New Demand by 2031 with INCREASED Market Share (sf / acres)		Lloydmister % Share of Demand	Lloydmister Share of Demand (sf)	Lloydmister Land Utilization Factor	Lloydmister Net Land Area (acres)
Total	**966,701**	**64.3**	**100%**	**966,701**	**0.34**	**64.3**
Downtown			5.0%	48,335	1.0	1.1
Lloyd Mall (Hwy 16 Central)			10.0%	96,670	0.9	2.5
Gold Horse Casino (Hwy 16 East)			30.0%	290,010	0.3	22.2
Power Centres (Hwy 16 West)			25.0%	241,675	0.3	18.5
Auto Cluster (Hwy 17 South)			3.0%	29,001	0.7	1.0
Coop Marketplace (Hwy 17 Central)			2.0%	19,334	0.7	0.6
North Industrial (Hwy 17 North)			5.0%	48,335	0.3	3.7
Neighbourhood (incl Lakeside ASP)			20.0%	193,340	0.3	14.8

8.0 Business Targeting & Action Plan

8.1 Introduction

The overall business targeting and action plan is premised as much on attracting new business to the community, as it is ensuring that the existing businesses throughout the various nodes are also successful.

Retail vacancies across the city are high, with the exception of the dominant Power Centres node. There are opportunities to create more balance and strength in Lloydminster and doing so would require some specific actions.

8.2 Business Targeting & Attraction

The targeting and attraction is based on identifying a very specific mix and niche of retailers, as well as retail typologies that fit the vision of the city and the postpositions of each respective node.

As documented, an important consideration for Lloydminster, because of its large regional presence and draw is to work with the businesses on establishing a greater market share penetration of the overall Trade Area. By incrementally working to increase the market share of available Trade Area household spending, retailers will continue to see the value in locating a physical store in Lloydminster. The demographics, spending, available land and vacancies in Lloydminster suggests that the following retailers represent opportunities over the next 10 years, although it is acknowledged that retailers are always adapting and changing their locational site criteria or formats to fit with changing economics and spending patterns, particularly e-commerce.

Near term (<5yrs)

- Costco
- London Drugs
- Value Village
- Wine & Beyond
- Everything Wine & More
- Goodlife Fitness

Long term (>5yrs)

- No Frills
- Fresh Co
- Fresons
- Bass Pro/Cabelas
- Decathlon Sporting
- Keg Restaurant
- Mr. Mike's Casual Steakhouse

8.3 Action Plan

The action items presented below represent considerations that would contribute to the attraction and retention of retail businesses in Lloydminster.

Strengthen Existing Offering

- Create zoning and possible concept plan to enable commercial development in Gold Horse Casino Node in the range of 200,000 sf
- Concentrate a fair share of new retail development within established nodes through infill (e.g. power centres node north of Hwy 16).
- Proactively market quality vacancies and track upcoming vacancies (eg current Canadian Tire store) and consider interim temporary uses, such as indoor skate park or bike park.
- Establish a public transit pilot program between commercial nodes and residential areas for workers and shoppers alike.
- Consider visioning and branding exercise to confirm and implement desired regional identify as a regional convention and meeting centre
- Weigh the pros and cons of conducting a tourism suitability analysis given current and planned natural, community and cultural assets.
- Partner with local First Nations, Heart of Treaty 6 Reconciliation group and SaskMetis Economic Development Corporation to identify mutually beneficial economic opportunities, including supports for entrepreneurs, established business owners and authentic cultural tourism operators.

Prioritize Downtown Revitalization

- Consider storefront improvement program concentrated downtown and consider additional community improvement style grants geared toward improving existing vacancies.
- Prioritize a smaller pilot project area for streetscaping or storefront improvements to create a concentrated visual impact and consider creating an "open street" (i.e. closed to vehicles) for pedestrians only in the Downtown.
- Continue to support the revitalization of downtown as outlined through the Downtown Area Redevelopment Plan.
- Consider zoning in the periphery of the Downtown that is multi-unit residential only and excludes a requirement for mixed-use with retail or commercial on the street.

Support neighbourhood commercial

- Encourage small (i.e. less than 20,000 sf) commercial developments which serve the everyday needs of residents in neighbourhood nodes.
- Maintain the neighbourhood orientation and scale of existing and future neighbourhood zones by encouraging regionally oriented retailers to locate along the City's established nodes

appendices

Appendix A: Community Survey Results

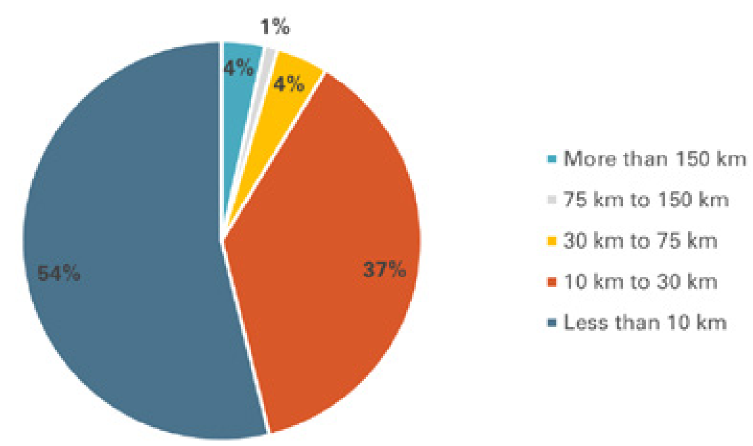
An online survey of residents and non-residents in Lloydminster was conducted to further inform this analysis. The goal of the survey is to understand perspectives and habits around shopping in Lloydminster, revealing perceived gaps in shops and services, how far shoppers are willing to travel, and most frequented shopping areas in the city. The survey supplements the already complete Business Climate Survey Report, our own interviews, and the business inventory to further inform our analysis.

The survey had an outstanding response-rate, receiving 731 responses from June 1 until July 10, 2022. After removing two duplicate responses, we had 729 responses, with 574 responses from Lloydminster residents and 155 from non-residents. We created a heat map from the postal code data provided by respondents to show where Lloydminster shoppers travel from, which can be seen in Section 6.0 in **Figure 6-1**.

Here the survey results are provided on a question-by-question basis. For our analysis of the implications of these results for Lloydminster, see Section "6.0 Community Survey" in the main body of this report. Whether the chart is showing results as a percentage or a whole number in indicated in each figure's title by either a % or a # symbol. Each question also specifies whether the question was posed to only residents, only non-residents, or both groups along with the number of respondents for each question.

Resident Question: How far are you prepared to travel for your day-to-day conveniences?

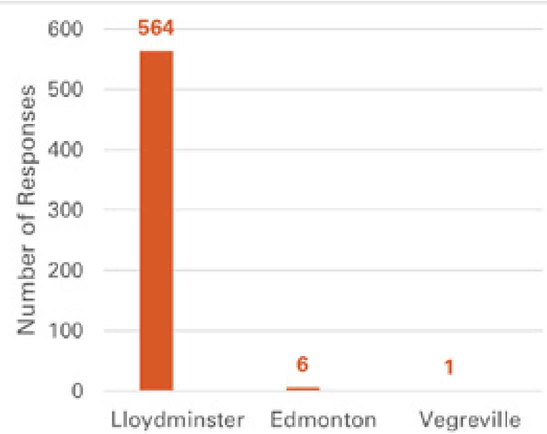
Figure A-1. Distance residents will travel for day-to-day conveniences (%)



(572 of 574 residents answered this question)

Resident Question: Where do you prefer to shop for your day-to-day conveniences (grocery, pharmacy, alcohol)?

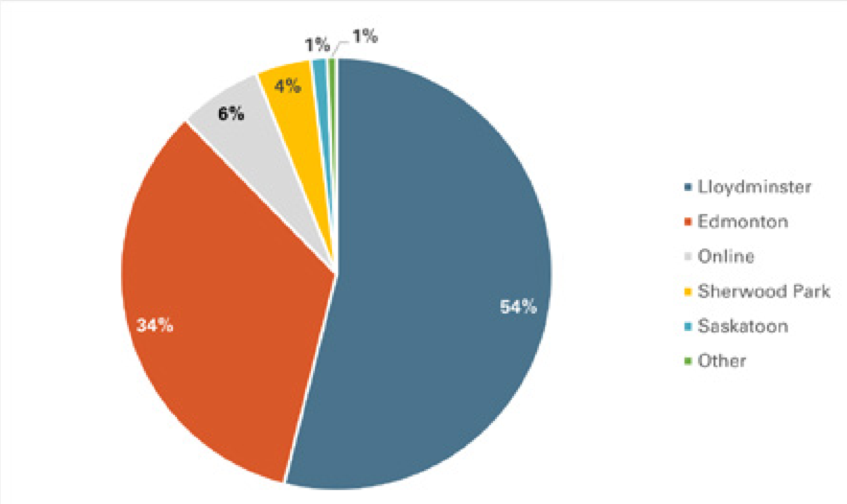
Figure A-2. Where do residents prefer to shop for day-to-day conveniences? (#)



(571 of 574 resident respondents answered this question)

Resident Question: Where do you prefer to shop for your bigger ticket items (home/auto/apparel/electronics etc.)?

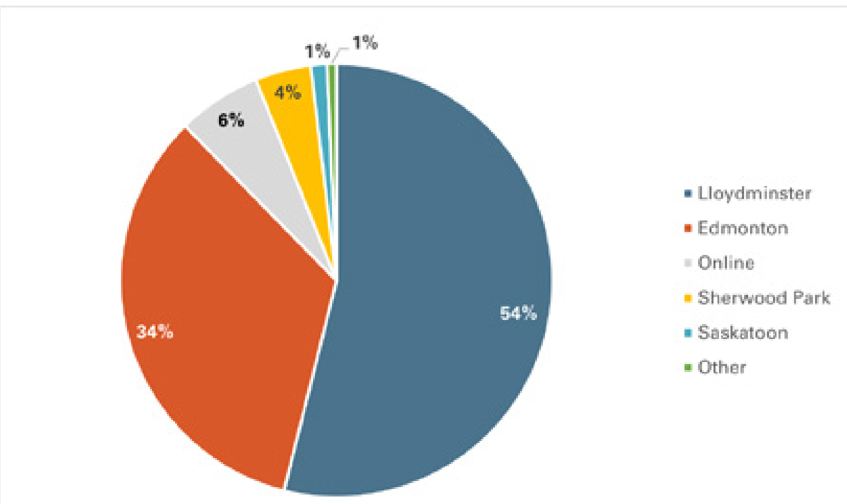
Figure A-3. Where do residents prefer to shop for bigger ticket items? (%)



(573 of 574 resident respondents answered this question)

Non-Resident Question: How often do you use shops or services in Lloydminster?

Figure A-4. How often non-residents shop in Lloydminster (%)



(155 of 155 (all) non-resident respondents answered this question)

Resident Question: What shops or services are missing in Lloydminster?

Figure A-5. Missing Shops and Services from Resident Respondents (#)

(556 of the 574 resident respondents completed this question.)

Resident Question: When thinking about your normal household spending, please identify what percentage (%) of your spending occurs inside Lloydminster, outside Lloydminster or on-line for the following store types/merchandise categories…

This question was the most time consuming on the survey, but residents responded at a very high rate, with responses being 99.5% complete on average

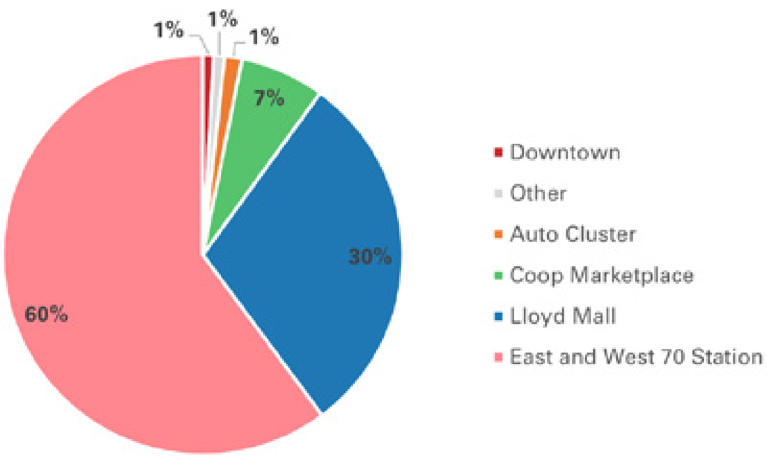
Table A-1.Household Spending Breakdown from Community Survey (%)

"Retail Merchandise & Spending Category (ON-LINE SURVEY)"	"Spending INSIDE Lloydminster"	"Spending OUTSIDE Lloydminster"	"Spending ONLINE"
Grocery & Specialty Foods	76.9	12.4	10.0
Pharmacy	97.1	1.5	1.1
Alcohol & Tobacco	91.9	6.7	0.2
Personal Services	93.7	5.5	0.1
Pet Care & Services	94.7	2.1	2.8
Child Care Services (outside of home)	99.2	0.8	0.0
Electronic Services	82.4	10.4	7.1
Clothing & Footwear	46.7	26.5	24.8
Clothing Services	95.8	3.0	0.0
Jewelry & Accessories	60.3	20.1	17.7
Health & Beauty	77.1	8.2	14.6
House & Home Décor	60.3	20.3	19.2
Home & Personal Electronics	62.7	16.0	21.1
Home Improvement & Gardening	86.5	9.4	4.0
Books & Multi-Media	42.1	9.4	48.5
Toys & Hobbies	53.0	16.6	30.2
Sporting Goods & Outdoor Recreation	58.9	20.5	20.1
Arts & Entertainment	53.4	35.4	10.9
Fitness & Leisure	72.8	17.7	8.6
Full Service Restaurants	71.4	26.9	1.2
Quick Service Restaurants	80.6	17.5	1.4
Auto Parts & Accessories	74.5	13.5	11.7
Auto/RV/Motorsports Dealerships	62.3	34.0	3.3
Auto Fuel	82.4	17.3	0.1
Health Care & Medical Services	83.7	15.6	0.7
	74.4	**14.7**	**10.4**

Resident & Non-Resident Question: What is your primary shopping location in Lloydminster?

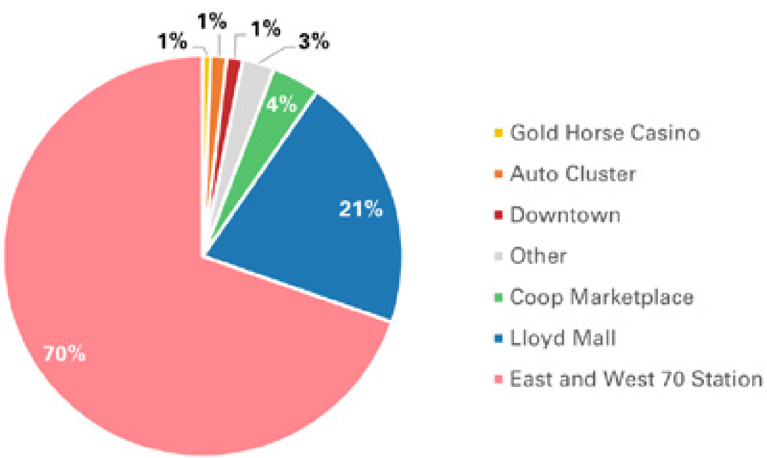
Colours in the following two charts correspond with the Node colours FBM selected for the Master Business Inventory Maps.

Figure A-6. Primary Shopping Node for Residents (%)



(569 of 574 resident respondents answered this question.)

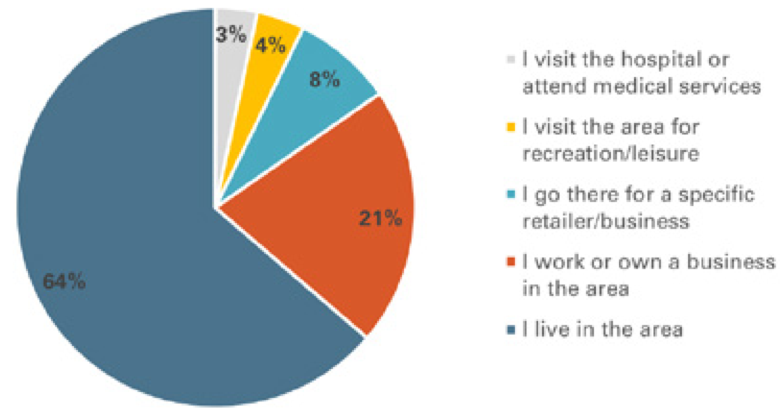
Figure A-7. Primary Shopping Node for Non-Residents (%)



(155 of 155 (all) non-resident respondents answered this question.)

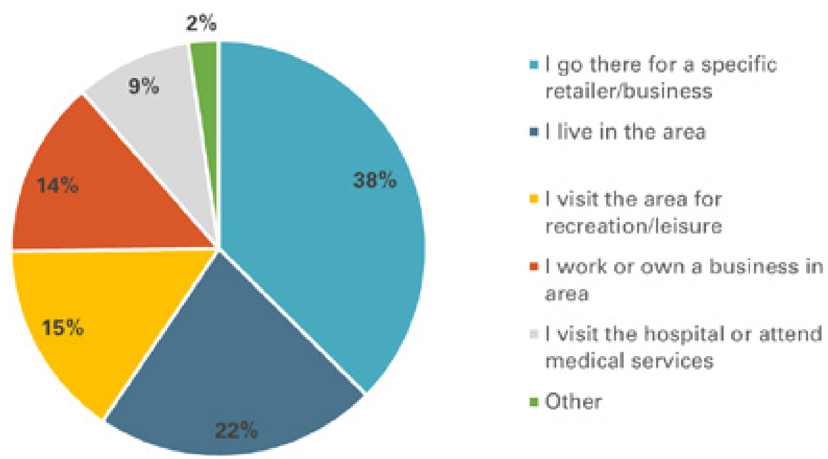
Resident & Non-Resident Question: What are your primary reasons for visiting or using shops & services in Lloydminster?

Figure A-8. Primary Reasons for Shopping in Lloydminster for Residents (%)



(571 of 574 resident respondents completed this question.)

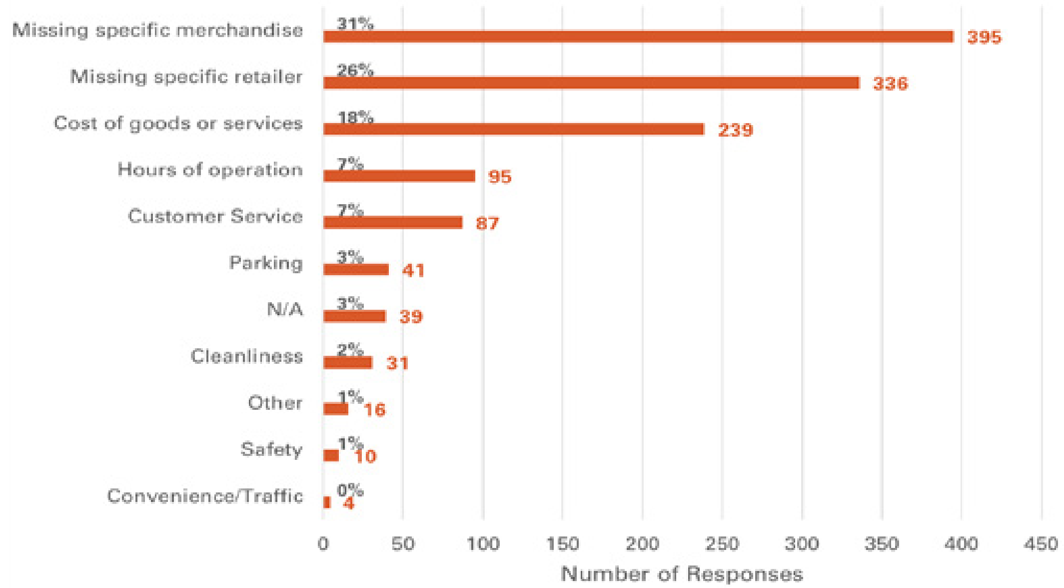
Figure A-9. Primary Reasons for Shopping in Lloydminster for Non-Residents (%)



(153 of the 155 non-resident respondents completed this question.)

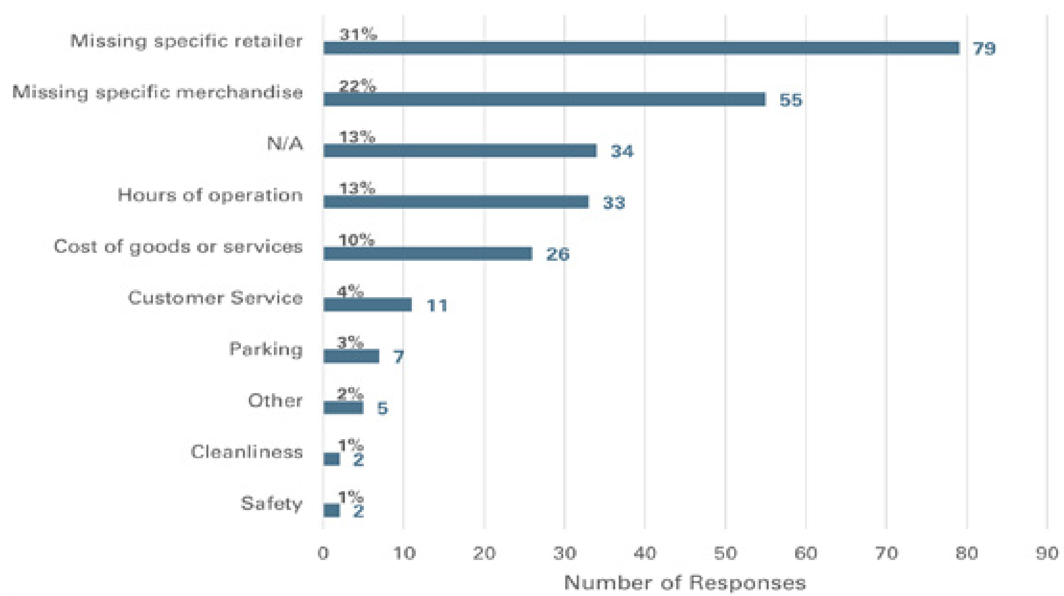
Resident & Non-Resident Question: What are your primary reasons for NOT using Lloydminster's Shops & Services, if any?

Figure A-10. Primary Reasons for NOT Shopping in Lloydminster for Residents (#, %)



(567 of the 574 resident respondents completed this question.)

Figure A-11. Primary Reasons for NOT Shopping in Lloydminster for Non-Residents (#, %)



(154 of the 155 non-resident respondents completed this question.)

Resident & Non-Resident Question: Do you have any other comments?

Respondents gave us a more nuanced insight into gaps and perceptions around the shopping scene in their responses to the open-ended question: "Do you have any other comments?" Of participants, 188 residents and 77 non-residents shared some form of response to this question (265 total). Differences between resident and non-resident responses were minimal so this section summarizes responses from both groups unless otherwise stated.

Respondents mainly used the open-question section to share the stores they wish would come to Lloydminster and we have included two tables here summarizing those results. One table shows most frequently mentioned tenants and the other most frequently mentioned types of store (see Table A-2 and Table A-3).

Resident & Non-Resident Question: Do you have any other comments?

Respondents gave us a more nuanced insight into gaps and perceptions around the shopping scene in their responses to the open-ended question: "Do you have any other comments?" Of participants, 188 residents and 77 non-residents shared some form of response to this question (265 total). Differences between resident and non-resident responses were minimal so this section summarizes responses from both groups.

Respondents mainly used the open-question section to share the stores they wish would come to Lloydminster and we have included two tables here summarizing those results. One table shows most frequently mentioned tenants and the other most frequently mentioned types of store (see and).

Table A-2. Most Frequently Mentioned Tenants from Other Comments (#)

Tenant Name	Mentions
Costco	124
Old Navy	39
Bed, Bath & Beyond	5
Lululemon	5
Children's Place	4
RW&CO.	4
Value Village	4
Cabela's	3
Designer Shoe Warehouse	3
H&M	3
London Drugs	3
Toys"R"Us	3
Dynamite	2
Eddie Bauer	2
Marshalls	2
Moore's	2
Northern Reflections	2
Save-On-Foods	2
Soft Moc	2
The Bay	2

Table A-3. Most Frequently Mentioned Store Types from Other Comments (#)

Store Type	Mentions
Clothing stores	64
Shoe stores	26
Children's clothing	16
Men's clothing	16
Unique local stores	12
Women's clothing	10
Toy store	7
Local coffee shop	6
Baby and maternity stores	4
Grocery Store	4
Book store	3
Children's shoe stores	3
Full service restaurants	3
High end restaurant	3
Running store	3
Senior's clothing	3
Youth clothing	3
Department store	2
Drinking places or nightclub	2
Food court in Lloyd Mall	2

Appendix B: Community Survey Questions

LLOYDMINSTER

Are you a City of Lloydminster resident? *

- YES
- NO

Resident Survey

What is the 6-digit postal code of your primary residence?

Where do you prefer to shop for your day-to-day conveniences (grocery, pharmacy, alcohol)?

a. Lloydminster
b. Vegreville
c. North Battleford
d. Sherwood Park
e. Edmonton
f. Saskatoon

How far are you prepared to travel for your day-to-day conveniences?

a. Less than 10 km
b. 10 km to 30 km
c. 30 km to 75 km
d. 75 km to 150 km
e. More than 150 km

Where do you prefer to shop for your bigger ticket items (home/auto/apparel/electronics etc.)?

a. Lloydminster
b. Vegreville
c. North Battleford
d. Sherwood Park
e. Edmonton
f. Saskatoon
g. Online

What is your primary shopping location in Lloydminster?

a. Downtown (50 Ave North/ Highway 17 North)
b. Lloyd Mall/Real Canadian Superstore (Highway 16 Central)
c. Fabricland/Coop Marketplace/Windsor Plywood (north of 36 St along 50 Ave South/ Highway 17 South)
d. Auto Cluster (south of 36 St along 50 Ave South/ Highway 17 South) including Home Hardware.
e. East and West 70 Station (70th Ave & Highway 16 West) including Walmart/Canadian Tire/Home Depot
f. Gold Horse Casino/Coop Gas/Chilled and Distilled (40 Ave & Highway 16 East)

When thinking about your normal household spending, please identify what percentage (%) of your spending occurs inside Lloydminster, outside Lloydminster or on-line for the following store types/merchandise categories

	Inside Lloydminster	Outside Lloydminster	Online
Grocery & Specialty Foods			
Pharmacy			
Alcohol & Tobacco			
Personal Care Services (inc. hairstylists, dental, laser clinic, nail salons)			
Pet Care (inc. food, vet services, pet grooming)			
Child Care Services			

Electronic Services (inc. cellular services, repair)			
Clothing & Footwear			
Clothing Services (inc. dry cleaning, laundry, alterations, etc.)			
Jewelry & Accessories			
Health & Beauty (inc. hair and personal care products)			
House & Home Decor			
Home & Personal Electronics			
Home Improvement & Gardening			
Books & Multi-Media			
Toys & Hobbies			
Sporting Goods & Recreation			
Arts & Entertainment			
Fitness & Leisure			
Full Service Restaurants			
Limited Service Food and Beverage or "Fast Food"			
Auto Parts & Accessories			
Auto/Motorsports/RV Dealerships			
Auto Fuel			
Health Care & Medical Service			

What are your primary reasons for visiting or using shops & services in Lloydminster?

- ☐ a) I work or own a business in the area
- ☐ b) I live in the area
- ☐ c) I visit the area for recreation/leisure
- ☐ d) I visit the hospital or attend medical services
- ☐ e) I go there for a specific retailer/business
- ☐ ______

What shops or services are missing in Lloydminster?

- ☐ Grocery & Specialty Foods
- ☐ Pharmacy
- ☐ Alcohol & Tobacco
- ☐ Personal Care Services (inc. hairstylists, dental, laser clinic, nail salons)
- ☐ Pet Care (inc. food, vet services, pet grooming)
- ☐ Child Care Services
- ☐ Electronic Services (inc. cellular services, repair)
- ☐ Clothing & Footwear
- ☐ Clothing Services (inc. dry cleaning, laundry, alterations, etc.)
- ☐ Jewelry & Accessories
- ☐ Health & Beauty (inc. hair and personal care products)
- ☐ House & Home Decor
- ☐ Home & Personal Electronics
- ☐ Home Improvement & Gardening
- ☐ Books & Multi-Media
- ☐ Toys & Hobbies
- ☐ Sporting Goods & Recreation
- ☐ Arts & Entertainment
- ☐ Fitness & Leisure
- ☐ Full Service Restaurants
- ☐ Limited Service Food and Beverage or "Fast Food"
- ☐ Auto Parts & Accessories
- ☐ Auto/Motorsports/RV Dealerships
- ☐ Auto Fuel
- ☐ Health Care & Medical Service
- ☐ ______

What are your primary reasons for NOT using Lloydminster's Shops & Services, if any?

- ☐ a) Missing specific merchandise
- ☐ b) Missing specific retailer
- ☐ c) Hours of operation
- ☐ d) Parking
- ☐ e) Customer Service
- ☐ f) Cleanliness
- ☐ g) Cost of goods or services
- ☐ h) Safety
- ☐ i) N/A
- ☐ ______

Do you have any other comments?

Non-resident Survey

What is the 6-digit postal code of your primary residence?

How often do you use shops or services in Lloydminster?

- a) Daily
- b) Weekly
- c) Monthly
- d) Yearly
- e) Rarely/Never

What is your primary shopping location in Lloydminster?

- a. Downtown (50 Ave North/ Highway 17 North)
- b. Lloyd Mall/Real Canadian Superstore (Highway 16 Central)
- c. Fabricland/Coop Marketplace/Windsor Plywood (north of 36 St along 50 Ave South/ Highway 17 South)
- d. Auto Cluster (south of 36 St along 50 Ave South/ Highway 17 South) including Home Hardware.
- e. East and West 70 Station (70th Ave & Highway 16 West) including Walmart/Canadian Tire/Home Depot
- f. Gold Horse Casino/Coop Gas/Chilled and Distilled (40 Ave & Highway 16 East)

What are your primary reasons for visiting or using shops & services in Lloydminster?

- a) I work or own a business in the area
- b) I live in the area
- c) I visit the area for recreation/leisure
- d) I visit the hospital or attend medical services
- e) I go there for a specific retailer/business

What are your primary reasons for NOT using Lloydminster's Shops & Services?

- a) Missing specific merchandise
- b) Missing specific retailer
- c) Hours of operation
- d) Parking
- e) Customer Service
- f) Cleanliness
- g) Cost of goods or services
- h) Safety
- i) N/A

Do you have any other comments?

Appendix C: Detailed Retail Demand Tables

Table C-1. Estimated Retail Demand **2021 to 2031** Based on **Maintaining** Current Market Share

(Source: FBM & Manifold Data Mining Inc)

Retail Spending by Merchandise Category		2021				2026				2031			
		LLOYDMINSTER Sales Productivity ($psf)	LLOYDMINSTER Estimated Market Share	Market Share Sales $	Current Retail Floorspace (sf)	LLOYDMINSTER Sales Productivity ($psf)	LLOYDMINSTER Estimated Market Share	Market Share Sales $	Current Retail Floorspace (sf)	LLOYDMINSTER Sales Productivity ($psf)	LLOYDMINSTER Estimated Market Share	Market Share Sales $	Current Retail Floorspace (sf)
Convenience & Day-to-Day Goods/Services	Grocery, Convenience & Specialty Foods	$525	28%	$179,295,914	341,248	$525	28%	$201,223,538	41,734	$525	28%	$218,795,906	75,179
	Pharmacy	$520	36%	$21,828,005	41,995	$520	36%	$24,327,090	4,808	$520	36%	$26,426,096	8,846
	Alcohol, Tobacco & Cannabis	$521	38%	$48,805,076	93,720	$521	38%	$54,437,160	10,815	$521	38%	$59,186,155	19,935
	Personal & Home Services	$240	24%	$22,456,067	93,719	$240	24%	$25,053,800	10,841	$240	24%	$27,246,835	19,994
	Health Care & Medical Services												
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Footwear	$303	54%	$79,555,907	262,311	$303	54%	$89,054,182	31,318	$303	54%	$96,871,587	57,093
	Jewelry & Accessories	$322	29%	$6,342,940	19,718	$322	29%	$7,085,065	2,307	$322	29%	$7,707,305	4,241
	Beauty & Personal Care	$420	62%	$38,837,747	92,512	$420	62%	$43,374,665	10,807	$420	62%	$47,176,350	19,863
	Furniture & Décor	$211	39%	$29,784,772	141,109	$211	39%	$33,268,030	16,502	$211	39%	$36,188,083	30,336
	Appliances & Electronics	$291	21%	$25,853,036	88,919	$291	21%	$28,792,536	10,110	$291	21%	$31,306,758	18,758
	Home Improvement & Gardening	$203	35%	$75,442,281	372,069	$203	35%	$84,209,137	43,237	$203	35%	$91,540,120	79,392
	Books, Media & Computers	$105	1%	$1,150,129	10,964	$105	1%	$1,283,396	1,270	$105	1%	$1,396,192	2,346
	Sporting Goods	$226	70%	$18,504,060	82,051	$226	70%	$20,655,363	9,539	$226	70%	$22,476,619	17,615
	Toys & Hobbies	$196	56%	$11,798,344	60,144	$196	56%	$13,143,069	6,855	$196	56%	$14,292,874	12,716
	Specialty Retail	$227	60%	$37,087,286	163,494	$227	60%	$41,507,050	19,484	$227	60%	$45,126,273	35,439
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	$516	56%	$78,235,922	151,661	$516	56%	$88,183,851	19,284	$516	56%	$95,886,813	34,216
	Restaurants & Pubs	$419	41%	$60,303,272	143,752	$419	41%	$67,991,710	18,328	$419	41%	$73,916,013	32,450
	Arts & Entertainment	$183	156%	$15,951,672	87,036	$183	156%	$17,811,470	10,147	$183	156%	$19,368,683	18,644
	Fitness & Leisure	$125	48%	$10,852,133	86,754	$125	48%	$12,092,446	9,915	$125	48%	$13,152,584	18,390
Automotive Goods (excluding repair)	Auto Parts & Accessories	$373	33%	$49,763,672	133,526	$373	33%	$55,764,518	16,101	$373	33%	$60,650,376	29,211
	Auto/RV/Motorsports Dealership	$300	13%	$52,753,719	175,846	$300	13%	$58,749,901	19,987	$300	13%	$63,878,792	37,084
	Auto Fuel												
	TOTAL RETAIL CATEGORIES ONLY	$327	38.3%	$864,601,954	2,642,548	$327	38.0%	$968,007,976	313,392	$327	37.9%	$1,052,590,416	571,749
	TOTAL (excluding Auto)	$327	45.7%	$762,084,563	2,333,176	$327	45.3%	$853,493,557	277,303	$327	45.2%	$928,061,247	505,454

Table C-2. Estimated Retail Demand **2021 to 2031** Based on **Increased** Market Share

(Source: FBM & Manifold Data Mining Inc)

Retail Spending by Merchandise Category		2021 LLOYDMINSTER Sales Productivity ($psf)	2021 LLOYDMINSTER Estimated Market Share	2021 Market Share Sales $	2021 Current Retail Floorspace (sf)	2026 LLOYDMINSTER Sales Productivity ($psf)	2026 LLOYDMINSTER Estimated Market Share	2026 Market Share Sales $	2026 Current Retail Floorspace (sf)	2031 LLOYDMINSTER Sales Productivity ($psf)	2031 LLOYDMINSTER Estimated Market Share	2031 Market Share Sales $	2031 Current Retail Floorspace (sf)
Convenience & Day-to-Day Goods/Services	Grocery, Convenience & Specialty Foods	$525	28%	$179,295,914	341,248	$525	50%	$353,342,563	331,257	$525	50%	$384,199,121	389,986
	Pharmacy	$520	36%	$21,828,005	41,995	$520	50%	$34,052,616	23,519	$520	50%	$36,990,767	29,172
	Alcohol, Tobacco & Cannabis	$521	38%	$48,805,076	93,720	$521	40%	$56,763,956	15,283	$521	40%	$61,715,936	24,793
	Personal & Home Services	$240	24%	$22,456,067	93,719	$240	30%	$31,928,830	39,534	$240	30%	$34,723,656	51,198
	Health Care & Medical Services										0%	$0	
												$0	
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Footwear	$303	54%	$79,555,907	262,311	$303	60%	$99,458,275	65,622	$303	60%	$108,188,977	94,409
	Jewelry & Accessories	$322	29%	$6,342,940	19,718	$322	30%	$7,365,862	3,180	$322	30%	$8,012,763	5,191
	Beauty & Personal Care	$420	62%	$38,837,747	92,512	$420	65%	$45,462,684	15,781	$420	65%	$49,447,378	25,272
	Furniture & Décor	$211	39%	$29,784,772	141,109	$211	40%	$34,173,706	20,793	$211	40%	$37,173,254	35,004
	Appliances & Electronics	$291	21%	$25,853,036	88,919	$291	25%	$34,439,846	29,533	$291	25%	$37,447,202	39,877
	Home Improvement & Gardening	$203	35%	$75,442,281	372,069	$203	35%	$84,832,759	46,312	$203	35%	$92,218,033	82,735
	Books, Media & Computers	$105	1%	$1,150,129	10,964	$105	1%	$2,330,633	11,254	$105	1%	$2,535,470	13,206
	Sporting Goods	$226	70%	$18,504,060	82,051	$226	70%	$20,654,816	9,537	$226	70%	$22,476,024	17,613
	Toys & Hobbies	$196	56%	$11,798,344	60,144	$196	60%	$14,164,743	12,063	$196	60%	$15,403,928	18,380
	Specialty Retail	$227	60%	$37,087,286	163,494	$227	60%	$41,258,633	18,389	$227	60%	$44,856,196	34,248
												$0	
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	$516	56%	$78,235,922	151,661	$516	60%	$95,282,739	33,045	$516	60%	$103,605,798	49,180
	Restaurants & Pubs	$419	41%	$60,303,272	143,752	$419	45%	$74,767,480	34,480	$419	45%	$81,282,174	50,010
	Arts & Entertainment	$183	156%	$15,951,672	87,036	$183	156%	$17,767,700	9,909	$183	156%	$19,321,086	18,384
	Fitness & Leisure	$125	48%	$10,852,133	86,754	$125	48%	$12,080,030	9,816	$125	48%	$13,139,080	18,282
												$0	
Automotive Goods (excluding repair)	Auto Parts & Accessories	$373	33%	$49,763,672	133,526	$373	35%	$58,668,393	23,893	$373	35%	$63,808,677	37,686
	Auto/RV/Motorsports Dealership	$300	13%	$52,753,719	175,846	$300	20%	$92,267,515	131,713	$300	20%	$100,322,507	158,563
	Auto Fuel												
	TOTAL RETAIL CATEGORIES ONLY	**$327**	**38.3%**	**$864,601,954**	**2,642,548**	**$343**	**53.6%**	**$1,211,063,779**	**884,914**	**$343**	**47.4%**	**$1,316,868,030**	**1,193,187**
	TOTAL (excluding Auto)	**$327**	**45.7%**	**$762,084,563**	**2,333,176**	**$346**	**63.5%**	**$1,060,127,871**	**729,308**	**$346**	**56.1%**	**$1,152,736,845**	**996,939**

NAICS 2-DIGIT	NAICS 2-DIGIT CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	BROAD MARKET CATEGORY	TENANT NAME	UNIT OR CIVIC NUMBER	STREET ADDRESS	Street Name	Node	Total buisness size (sf)	Branded Chain or Local Business
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					3,029	Brand
44	Retail trade	HOME FURNITURE & DÉCOR	Retail	[redacted]					6,722	Brand
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					1,178	
				[redacted]					1,131	
44	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					3,942	Brand
81	Other services (except public administration)	BEAUTY & WELLNESS	Retail	[redacted]					3,524	Local
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					4,653	
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					1,804	Brand
51	Information and cultural industries	ELECTRONICS & APPLIANCES	Retail	[redacted]					1,067	Brand
44	Retail trade	ELECTRONICS & APPLIANCES	Retail	[redacted]					20,251	Brand
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					1,350	Brand
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]					6,128	Brand
44	Retail trade	FASHION & FOOTWEAR	Retail	[redacted]					2,100	Brand
44	Retail trade	FASHION & FOOTWEAR	Retail	[redacted]					1,686	Local
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]					3,325	Brand
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail	[redacted]					5,802	Brand
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					1,701	Brand
				[redacted]					2,723	
				[redacted]					1,872	
				[redacted]					6,937	
45	Retail trade	VACANT	Vacant	[redacted]					65,972	
45	Retail trade	GENERAL MERCHANDISE	Retail	[redacted]					132,059	Brand
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail	[redacted]					1,031	Brand
44	Retail trade	AUTO FUEL	Auto	[redacted]					3,150	
		Auto Parts & Accessories	Auto	[redacted]						
		Auto Service	Auto	[redacted]						
		Auto/RV/Motorsports Dealership	Auto	[redacted]						
		Alcohol, Tobacco & Cannabis	Retail	[redacted]						
		Arts & Entertainment	Retail	[redacted]						
		Beauty & Wellness	Retail	[redacted]						
		Books, Media & Computers	Retail	[redacted]						
		Electronics & Appliances	Retail	[redacted]						
		Fashion & Footwear	Retail	[redacted]						
		Full Service Restaurants & Pubs	Retail	[redacted]						
		Grocery, Convenience & Specialty Foods	Retail	[redacted]						
		Home Furniture & Décor	Retail	[redacted]						
		Home Improvement & Gardening	Retail	[redacted]						
		Jewelry & Accessories	Retail	[redacted]						
		Personal Service	Retail	[redacted]						
		Pharmacy	Retail	[redacted]						
		Quick Service F&B	Retail	[redacted]						
		Specialty Retail	Retail	[redacted]						
		Sporting Goods & Outdoor Recreation	Retail	[redacted]						
		Toys & Hobbies	Retail	[redacted]						
		Auto Parts & Accessories	Auto	[redacted]					33,015	
		Auto Service	Auto	[redacted]					26,412	
		Auto/RV/Motorsports Dealership	Auto	[redacted]					0	
		Alcohol, Tobacco & Cannabis	Retail	[redacted]					0	

NAICS 2-DIGIT	NAICS 2-DIGIT CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	BROAD MARKET CATEGORY	TENANT NAME	UNIT OR CIVIC NUMBER	STREET ADDRESS	Street Name	Node	Total buisness size (sf)	Branded Chain or Local Business
		Arts & Entertainment	Retail	[redacted]					0	
		Beauty & Wellness	Retail	[redacted]					0	
		Books, Media & Computers	Retail	[redacted]					0	
		Electronics & Appliances	Retail	[redacted]					2,641	
		Fashion & Footwear	Retail	[redacted]					2,641	
		Full Service Restaurants & Pubs	Retail	[redacted]					0	
		Grocery, Convenience & Specialty Foods	Retail	[redacted]					1,321	
		Home Furniture & Décor	Retail	[redacted]					6,603	
		Home Improvement & Gardening	Retail	[redacted]					26,412	
		Jewelry & Accessories	Retail	[redacted]					0	
		Personal Service	Retail	[redacted]					0	
		Pharmacy	Retail	[redacted]					0	
		Quick Service F&B	Retail	[redacted]					0	
		Specialty Retail	Retail	[redacted]					6,603	
		Sporting Goods & Outdoor Recreation	Retail	[redacted]					13,206	
		Toys & Hobbies	Retail	[redacted]					13,206	
45	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					1,599	Brand
45	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					1,207	Brand
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					2,211	Brand
44	Retail trade	FASHION & FOOTWEAR	Retail	[redacted]					5,286	Brand
45	Retail trade	SPECIALTY RETAIL	Retail	[redacted]					4,004	Brand
44	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					1,800	Local
45	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					1,300	Local
31	Manufacturing	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail	[redacted]					1,100	Brand
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail	[redacted]					3,239	Brand
44	Retail trade	AUTO FUEL	Auto	[redacted]					2,267	
44	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					2,159	Local
32	Manufacturing	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					7,501	
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]					1,234	Brand
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					1,259	
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]					4,115	Brand
45	Retail trade	SPECIALTY RETAIL	Retail	[redacted]					9,879	Brand
45	Retail trade	SPECIALTY RETAIL	Retail	[redacted]					8,817	Brand
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					1,283	
81	Other services (except public administration)	ELECTRONICS & APPLIANCES	Retail	[redacted]					2,098	Brand
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]					4,256	Brand
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					2,193	Brand
81	Other services (except public administration)	ELECTRONICS & APPLIANCES	Retail	[redacted]					1,520	Brand
44	Retail trade	FASHION & FOOTWEAR	Retail	[redacted]					1,688	Brand
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					1,032	Brand
		PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					13,385	
44	Retail trade	HOME IMPROVEMENT & GARDENING	Retail	[redacted]					98,397	Brand
44	Retail trade	HOME FURNITURE & DÉCOR	Retail	[redacted]					16,893	Brand
45	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					3,762	Local
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]					643	
44	Retail trade	AUTO FUEL	Auto	[redacted]					947	
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail	[redacted]					621	Brand
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					7,277	
45	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					1,039	Brand
44	Retail trade	FASHION & FOOTWEAR	Retail	[redacted]					6,387	Brand
44	Retail trade	PHARMACY	Retail	[redacted]					1,712	Local
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					23,085	
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail	[redacted]					2,076	Brand
44	Retail trade	FASHION & FOOTWEAR	Retail	[redacted]					22,211	Brand
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					6,063	Brand
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					6,652	
44	Retail trade	BEAUTY & WELLNESS	Retail	[redacted]					6,772	Local
45	Retail trade	TOYS & HOBBIES	Retail	[redacted]					17,778	Brand
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]					5,985	Brand
71	Arts, entertainment and recreation	FITNESS & LEISURE	Retail	[redacted]					14,390	Brand
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]					11,500	

NAICS 2-DIGIT	NAICS 2-DIGIT CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	BROAD MARKET CATEGORY	TENANT NAME	UNIT OR CIVIC NUMBER	STREET ADDRESS	Street Name	Node	Total buisness size (sf)	Branded Chain or Local Business
44	Retail trade	HOME IMPROVEMENT & GARDENING	Retail	[redacted]					36,296	Brand
									25,103	
									5,108	
									5,200	
		PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						8,856	
44	Retail trade	FASHION & FOOTWEAR	Retail						8,353	Brand
31	Manufacturing	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail						1,293	Local
44	Retail trade	JEWELRY & ACCESSORIES	Retail						2,584	Brand
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						3,572	
44	Retail trade	HOME IMPROVEMENT & GARDENING	Retail						26,392	Brand
44	Retail trade	FASHION & FOOTWEAR	Retail						5,167	Brand
45	Retail trade	SPECIALTY RETAIL	Retail						2,097	Brand
45	Retail trade	SPECIALTY RETAIL	Retail						12,586	Brand
72	Accommodation and food services	QUICK SERVICE F&B	Retail						1,360	Brand
72	Accommodation and food services	QUICK SERVICE F&B	Retail						4,764	Brand
45	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail						2,207	Brand
72	Accommodation and food services	QUICK SERVICE F&B	Retail						4,492	Brand
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail						1,139	Brand
44	Retail trade	AUTO PARTS & ACCESSORIES	Auto						26,980	
45	Retail trade	SPORTING GOODS & OUTDOOR RECREATION	Retail						11,353	Brand
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						2,298	
81	Other services (except public administration)	PERSONAL SERVICE	Retail						1,079	Brand
72	Accommodation and food services	QUICK SERVICE F&B	Retail						1,192	Brand
44	Retail trade	FASHION & FOOTWEAR	Retail						2,223	Brand
44	Retail trade	HOME IMPROVEMENT & GARDENING	Retail						51,919	Brand
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						5,628	
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail						3,767	Local
45	Retail trade	GENERAL MERCHANDISE	Retail						20,606	Brand
		Auto Parts & Accessories	Auto						0	
		Auto Service	Auto							
		Auto/RV/Motorsports Dealership	Auto						0	
		Alcohol, Tobacco & Cannabis	Retail						0	
		Arts & Entertainment	Retail						0	
		Beauty & Wellness	Retail						6,182	
		Books, Media & Computers	Retail						412	
		Electronics & Appliances	Retail						0	
		Fashion & Footwear	Retail						0	
		Full Service Restaurants & Pubs	Retail						0	
		Grocery, Convenience & Specialty Foods	Retail						4,121	
		Home Furniture & Décor	Retail						0	
		Home Improvement & Gardening	Retail						0	
		Jewelry & Accessories	Retail						412	
		Personal Service	Retail						0	
		Pharmacy	Retail						8,242	
		Quick Service F&B	Retail						0	
		Specialty Retail	Retail						412	
		Sporting Goods & Outdoor Recreation	Retail						412	
		Toys & Hobbies	Retail						412	
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						3,226	
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail						43,810	Brand
44	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail						6,018	Brand
45	Retail trade	SPORTING GOODS & OUTDOOR RECREATION	Retail						17,401	Brand
45	Retail trade	SPECIALTY RETAIL	Retail						26,826	Brand
72	Accommodation and food services	QUICK SERVICE F&B	Retail						2,268	Brand
72	Accommodation and food services	QUICK SERVICE F&B	Retail						1,643	Brand
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail						1,726	Brand
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail						1,055	Local
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						6,130	
51	Information and cultural industries	ELECTRONICS & APPLIANCES	Retail						1,129	Brand
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail						5,817	Brand
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						1,382	

NAICS 2-DIGIT	NAICS 2-DIGIT CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	BROAD MARKET CATEGORY	TENANT NAME	UNIT OR CIVIC NUMBER	STREET ADDRESS	Street Name	Node	Total buisness size (sf)	Branded Chain or Local Business
45	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					2,496	Local
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]					5,353	Local
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					3,392	Brand
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]					4,832	
44	Retail trade	AUTO PARTS & ACCESSORIES	Auto	[redacted]					1,163	
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					2,106	Brand
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]					1,047	Brand
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]					7,199	Local
0	Vacant	VACANT	Vacant	[redacted]					6,230	
0	Vacant	VACANT	Vacant	[redacted]					6,241	
0	Vacant	VACANT	Vacant	[redacted]					2,122	
0	Vacant	VACANT	Vacant	[redacted]					8,216	
0	Vacant	VACANT	Vacant	[redacted]					1,900	
0	Vacant	VACANT	Vacant	[redacted]					1,887	
0	Vacant	VACANT	Vacant	[redacted]					2,815	
0	Vacant	VACANT	Vacant	[redacted]					3,371	
0	Vacant	VACANT	Vacant	[redacted]					1,105	
0	Vacant	VACANT	Vacant	[redacted]					3,943	
0	Vacant	VACANT	Vacant	[redacted]					1,842	
0	Vacant	VACANT	Vacant	[redacted]					1,454	
0	Vacant	VACANT	Vacant	[redacted]					1,559	
0	Vacant	VACANT	Vacant	[redacted]					1,765	
0	Vacant	VACANT	Vacant	[redacted]					1,747	
45	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					2,124	Brand
		Auto Parts & Accessories	Auto	[redacted]					3,403	
		Auto Service	Auto	[redacted]					8,507	
		Auto/RV/Motorsports Dealership	Auto	[redacted]					0	
		Alcohol, Tobacco & Cannabis	Retail	[redacted]					0	
		Arts & Entertainment	Retail	[redacted]					0	
		Beauty & Wellness	Retail	[redacted]					25,522	
		Books, Media & Computers	Retail	[redacted]					4,254	
		Electronics & Appliances	Retail	[redacted]					5,104	
		Fashion & Footwear	Retail	[redacted]					42,536	
		Full Service Restaurants & Pubs	Retail	[redacted]					0	
		Grocery, Convenience & Specialty Foods	Retail	[redacted]					34,029	
		Home Furniture & Décor	Retail	[redacted]					6,806	
		Home Improvement & Gardening	Retail	[redacted]					8,507	
		Jewelry & Accessories	Retail	[redacted]					4,254	
		Personal Service	Retail	[redacted]					0	
		Pharmacy	Retail	[redacted]					8,507	
		Quick Service F&B	Retail	[redacted]					1,701	
		Specialty Retail	Retail	[redacted]					8,507	
		Sporting Goods & Outdoor Recreation	Retail	[redacted]					4,254	
		Toys & Hobbies	Retail	[redacted]					4,254	
45	Retail trade	GENERAL MERCHANDISE	Retail	[redacted]					170,145	Brand
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					5,185	
44	Retail trade	FASHION & FOOTWEAR	Retail	[redacted]					20,023	Brand
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					6,299	
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					2,200	Brand
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					1,428	

NAICS 2-DIGIT	NAICS 2-DIGIT CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	BROAD MARKET CATEGORY	TENANT NAME	UNIT OR CIVIC NUMBER	STREET ADDRESS	Street Name	Node	Total business size (sf)	Branded Chain or Local Business
45	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					3,165	Local
45	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					4,340	Local
45	Retail trade	SPECIALTY RETAIL	Retail	[redacted]					3,160	Local
44	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					1,844	Brand
44	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					4,080	Brand
44	Retail trade	SPECIALTY RETAIL	Retail	[redacted]					1,412	Local
44	Retail trade	FASHION & FOOTWEAR	Retail	[redacted]					822	Local
44	Retail trade	JEWELRY & ACCESSORIES	Retail	[redacted]					1,386	Local
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]					3,274	Local
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					5,105	Brand
45	Retail trade	BOOKS, MEDIA & COMPUTERS	Retail	[redacted]					1,986	Local
44	Retail trade	BEAUTY & WELLNESS	Retail	[redacted]					2,797	Brand
45	Retail trade	SPECIALTY RETAIL	Retail	[redacted]					1,384	Brand
51	Information and cultural industries	ELECTRONICS & APPLIANCES	Retail	[redacted]					551	Brand
44	Retail trade	FASHION & FOOTWEAR	Retail	[redacted]					3,244	Brand
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]					1,018	Brand
81	Other services (except public administration)	BEAUTY & WELLNESS	Retail	[redacted]					2,032	Local
44	Retail trade	FASHION & FOOTWEAR	Retail	[redacted]					3,437	Brand
44	Retail trade	FASHION & FOOTWEAR	Retail	[redacted]					3,724	Brand
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					3,678	Brand
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]					15,941	
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]					9,733	Local
45	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					1,614	Local
44	Retail trade	FASHION & FOOTWEAR	Retail	[redacted]					911	Brand
44	Retail trade	HOME IMPROVEMENT & GARDENING	Retail	[redacted]					6,210	Brand
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					5,004	
45	Retail trade	BOOKS, MEDIA & COMPUTERS	Retail	[redacted]					1,579	Brand
56	Administrative and support, waste managemer	PERSONAL SERVICE	Retail	[redacted]					1,625	Brand
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					3,923	Brand
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]					1,155	Brand
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]					1,855	Local
33	Manufacturing			[redacted]					15,115	
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]					1,962	Local
44	Retail trade	SPECIALTY RETAIL	Retail	[redacted]					1,642	Brand
45	Retail trade	SPECIALTY RETAIL	Retail	[redacted]					9,446	Brand
45	Retail trade	GENERAL MERCHANDISE	Retail	[redacted]					12,580	Brand
		Auto Parts & Accessories	Auto	[redacted]					629	
		Auto Service	Auto	[redacted]					0	
		Auto/RV/Motorsports Dealership	Auto	[redacted]					0	
		Alcohol, Tobacco & Cannabis	Retail	[redacted]					0	
		Arts & Entertainment	Retail	[redacted]					0	
		Beauty & Wellness	Retail	[redacted]					1,258	
		Books, Media & Computers	Retail	[redacted]					629	
		Electronics & Appliances	Retail	[redacted]					0	
		Fashion & Footwear	Retail	[redacted]					629	
		Full Service Restaurants & Pubs	Retail	[redacted]					0	
		Grocery, Convenience & Specialty Foods	Retail	[redacted]					3,145	
		Home Furniture & Décor	Retail	[redacted]					0	
		Home Improvement & Gardening	Retail	[redacted]					629	
		Jewelry & Accessories	Retail	[redacted]					629	
		Personal Service	Retail	[redacted]					0	
		Pharmacy	Retail	[redacted]					0	
		QUICK SERVICE F&B	Retail	[redacted]					0	
		Specialty Retail	Retail	[redacted]					3,774	
		Sporting Goods & Outdoor Recreation	Retail	[redacted]					629	
		Toys & Hobbies	Retail	[redacted]					629	

NAICS 2-DIGIT	NAICS 2-DIGIT CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	BROAD MARKET CATEGORY	TENANT NAME	UNIT OR CIVIC NUMBER	STREET ADDRESS	Street Name	Node	Total business size (sf)	Branded Chain or Local Business
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	2,825	
44	Retail trade	HOME IMPROVEMENT & GARDENING	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	1,627	Local
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	1,618	
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	2,052	Local
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	1,497	
44	Retail trade	FASHION & FOOTWEAR	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	2,041	Brand
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	1,487	Brand
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	1,455	
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	3,164	Brand
44	Retail trade	AUTO FUEL	Auto	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	1,643	
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	12,224	
44	Retail trade	AUTO PARTS & ACCESSORIES	Auto	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	696	
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	1,438	Local
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	1,626	Brand
44	Retail trade	FASHION & FOOTWEAR	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	3,165	Brand
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	2,453	Brand
71	Arts, entertainment and recreation	FITNESS & LEISURE	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	11,176	Brand
45	Retail trade	SPECIALTY RETAIL	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	1,199	Brand
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	622	Brand
				[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	4,505	
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	1,359	
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	3,243	Brand
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	1,256	
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	2,902	Brand
44	Retail trade	AUTO FUEL	Auto	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	1,742	
44	Retail trade	AUTO FUEL	Auto	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	1,201	
32	Manufacturing	SPECIALTY RETAIL	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	2,807	Local
53	Real estate and rental and leasing	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	4,839	
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	1,277	
81	Other services (except public administration)	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	792	
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	6,637	
44	Retail trade	AUTO PARTS & ACCESSORIES	Auto	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	1,509	
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	1,410	Local
44	Retail trade	FASHION & FOOTWEAR	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	3,424	Brand
44	Retail trade	FASHION & FOOTWEAR	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	1,045	Brand
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	1,622	Brand
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	11,201	
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	1,180	Brand
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	4,867	Local
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	7,033	
44	Retail trade	AUTO PARTS & ACCESSORIES	Auto	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	18,425	
44	Retail trade	AUTO FUEL	Auto	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	3,330	
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	315	Brand
44	Retail trade	BEAUTY & WELLNESS	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	4,457	Brand
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	2,149	
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	2,315	Local
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	2,629	Local
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	1,499	Local
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	1,930	Local
			Office & Medical	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	1,543	
		PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	13,195	
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	1,512	Brand
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	5,061	Brand
44	Retail trade	FASHION & FOOTWEAR	Retail	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	1,136	Brand
				[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	30,770	
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	1,336	

NAICS 2-DIGIT	NAICS 2-DIGIT CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	BROAD MARKET CATEGORY	TENANT NAME	UNIT OR CIVIC NUMBER	STREET ADDRESS	Street Name	Node	Total business size (sf)	Branded Chain or Local Business
45	Retail trade	SPECIALTY RETAIL	Retail	[redacted]					3,222	Brand
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail						1,156	Brand
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail						3,160	Brand
44	Retail trade	AUTO FUEL	Auto						729	
81	Other services (except public administration)	PERSONAL SERVICE	Retail						974	Local
81	Other services (except public administration)	PERSONAL SERVICE	Retail						1,260	Brand
44	Retail trade	FASHION & FOOTWEAR	Retail						1,459	Brand
72	Accommodation and food services	QUICK SERVICE F&B	Retail						1,287	Brand
44	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail						7,922	Brand
44	Retail trade	FASHION & FOOTWEAR	Retail						2,629	Local
44	Retail trade	FASHION & FOOTWEAR	Retail						5,329	Brand
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail						5,331	Brand
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						2,208	
23	Construction	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						6,650	
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail						50,618	Brand
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail						914	Brand
44	Retail trade	AUTO FUEL	Auto						5,591	
44	Retail trade	BEAUTY & WELLNESS	Retail						1,456	Brand
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail						1,015	Brand
44	Retail trade	FASHION & FOOTWEAR	Retail						3,120	Local
81	Other services (except public administration)	AUTO SERVICE	Auto						1,488	
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail						2,409	Brand
44	Retail trade	AUTO FUEL	Auto						1,319	
45	Retail trade	GENERAL MERCHANDISE	Retail						15,534	Brand
		Auto Parts & Accessories	Auto						0	
		Auto Service	Auto							
		Auto/RV/Motorsports Dealership	Auto						0	
		Alcohol, Tobacco & Cannabis	Retail						0	
		Arts & Entertainment	Retail						0	
		Beauty & Wellness	Retail						4,660	
		Books, Media & Computers	Retail						311	
		Electronics & Appliances	Retail						0	
		Fashion & Footwear	Retail						0	
		Full Service Restaurants & Pubs	Retail						0	
		Grocery, Convenience & Specialty Foods	Retail						3,107	
		Home Furniture & Décor	Retail						0	
		Home Improvement & Gardening	Retail						0	
		Jewelry & Accessories	Retail						311	
		Personal Service	Retail						0	
		Pharmacy	Retail						6,214	
		QUICK SERVICE F&B	Retail						0	
		Specialty Retail	Retail						311	
		Sporting Goods & Outdoor Recreation	Retail						311	
		Toys & Hobbies	Retail						311	
44	Retail trade	HOME FURNITURE & DÉCOR	Retail						4,815	Brand
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail						491	Brand
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail						8,527	Brand
81	Other services (except public administration)	AUTO SERVICE	Auto						6,414	
44	Retail trade	AUTO PARTS & ACCESSORIES	Auto						1,309	
44	Retail trade	FASHION & FOOTWEAR	Retail						2,153	Brand
72	Accommodation and food services	QUICK SERVICE F&B	Retail						1,155	Brand
72	Accommodation and food services	QUICK SERVICE F&B	Retail						1,638	Brand
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						1,369	
41	Wholesale trade								1,587	
45	Retail trade	GENERAL MERCHANDISE	Retail						110,977	Brand
		Auto Parts & Accessories	Auto						0	

NAICS 2-DIGIT	NAICS 2-DIGIT CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	BROAD MARKET CATEGORY	TENANT NAME	UNIT OR CIVIC NUMBER	STREET ADDRESS	Street Name	Node	Total business size (sf)	Branded Chain or Local Business
		Auto Service	Auto	[redacted]					0	
		Auto/RV/Motorsports Dealership	Auto	[redacted]					0	
		Alcohol, Tobacco & Cannabis	Retail	[redacted]					0	
		Arts & Entertainment	Retail	[redacted]					0	
		Beauty & Wellness	Retail	[redacted]					11,098	
		Books, Media & Computers	Retail	[redacted]					1,110	
		Electronics & Appliances	Retail	[redacted]					0	
		Fashion & Footwear	Retail	[redacted]					16,647	
		Full Service Restaurants & Pubs	Retail	[redacted]					0	
		Grocery, Convenience & Specialty Foods	Retail	[redacted]					61,037	
		Home Furniture & Décor	Retail	[redacted]					2,220	
		Home Improvement & Gardening	Retail	[redacted]					0	
		Jewelry & Accessories	Retail	[redacted]					5,549	
		Personal Service	Retail	[redacted]					1,110	
		Pharmacy	Retail	[redacted]					6,659	
		QUICK SERVICE F&B	Retail	[redacted]					0	
		Specialty Retail	Retail	[redacted]					5,549	
		Sporting Goods & Outdoor Recreation	Retail	[redacted]					0	
		Toys & Hobbies	Retail	[redacted]					0	
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					1,586	
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]					4,230	Local
44	Retail trade	FASHION & FOOTWEAR	Retail	[redacted]					3,392	Brand
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					20,399	
44	Retail trade	ELECTRONICS & APPLIANCES	Retail	[redacted]					3,135	Local
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					1,971	Brand
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]					14,847	
51	Information and cultural industries	ELECTRONICS & APPLIANCES	Retail	[redacted]					2,642	Brand
44	Retail trade	BEAUTY & WELLNESS	Retail	[redacted]					637	Brand
44	Retail trade	HOME FURNITURE & DÉCOR	Retail	[redacted]					22,102	Brand
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]					2,350	Local
71	Arts, entertainment and recreation	ARTS & ENTERTAINMENT	Retail	[redacted]					4,458	Local
44	Retail trade	ELECTRONICS & APPLIANCES	Retail	[redacted]					1,963	Brand
44	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					2,231	Local
44	Retail trade	FASHION & FOOTWEAR	Retail	[redacted]					18,143	Brand
0	Vacant	VACANT	Vacant	[redacted]					3,340	
0	Vacant	VACANT	Vacant	[redacted]					2,673	
0	Vacant	VACANT	Vacant	[redacted]					2,355	
0	Vacant	VACANT	Vacant	[redacted]					2,787	
0	Vacant	VACANT	Vacant	[redacted]					1,171	
0	Vacant	VACANT	Vacant	[redacted]					11,071	
0	Vacant	VACANT	Vacant	[redacted]					2,244	
0	Vacant	VACANT	Vacant	[redacted]					1,611	
0	Vacant	VACANT	Vacant	[redacted]					3,194	
0	Vacant	VACANT	Vacant	[redacted]					2,577	Brand
0	Vacant	VACANT	Vacant	[redacted]					13,588	
0	Vacant	VACANT	Vacant	[redacted]					578	
0	Vacant	VACANT	Vacant	[redacted]					392	
0	Vacant	VACANT	Vacant	[redacted]					394	
0	Vacant	VACANT	Vacant	[redacted]					1,375	
0	Vacant	VACANT	Vacant	[redacted]					2,354	
0	Vacant	VACANT	Vacant	[redacted]					2,036	
0	Vacant	VACANT	Vacant	[redacted]					6,804	
0	Vacant	VACANT	Vacant	[redacted]					1,091	
0	Vacant	VACANT	Vacant	[redacted]					2,097	
0	Vacant	VACANT	Vacant	[redacted]					847	
0	Vacant	VACANT	Vacant	[redacted]					1,593	

NAICS 2-DIGIT	NAICS 2-DIGIT CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	BROAD MARKET CATEGORY	TENANT NAME	UNIT OR CIVIC NUMBER	STREET ADDRESS	Street Name	Node	Total business size (sf)	Branded Chain or Local Business
0	Vacant	VACANT	Vacant	[redacted]					1,531	
0	Vacant	VACANT	Vacant						1,348	
0	Vacant	VACANT	Vacant						3,121	
0	Vacant	VACANT	Vacant						1,405	
0	Vacant	VACANT	Vacant						1,189	
0	Vacant	VACANT	Vacant						656	
0	Vacant	VACANT	Vacant						231	
44	Retail trade	FASHION & FOOTWEAR	Retail						3,645	Brand
									8,559	
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						7,604	
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						7,237	
72	Accommodation and food services	QUICK SERVICE F&B	Retail						3,587	Brand
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						2,208	
45	Retail trade	SPORTING GOODS & OUTDOOR RECREATION	Retail						6,943	Local
45	Retail trade	FASHION & FOOTWEAR	Retail						14,575	Local
72	Accommodation and food services	QUICK SERVICE F&B	Retail						417	Local
62	Health care and social assistance	PERSONAL SERVICE	Retail						1,066	Local

NAICS 2-DIGIT	NAICS 2-DIGIT CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	BROAD MARKET CATEGORY	TENANT NAME	UNIT OR CIVIC NUMBER	STREET ADDRESS	Street Name	Node	Total business size (sf)	Branded Chain or Local Business
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]					973	Local
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail						2,985	Brand
44	Retail trade	AUTO FUEL	Auto						663	
									1,462	
44	Retail trade	FASHION & FOOTWEAR	Retail						3,840	Local
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						1,377	
53	Real estate and rental and leasing	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						3,073	
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						1,388	
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail						1,654	Local
44	Retail trade	HOME FURNITURE & DÉCOR	Retail						5,385	Local
81	Other services (except public administration)	PERSONAL SERVICE	Retail						3,127	Local
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						1,796	
81	Other services (except public administration)	PERSONAL SERVICE	Retail						1,008	Local
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						3,950	
44	Retail trade	HOME FURNITURE & DÉCOR	Retail						9,955	Local
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						1,643	
44	Retail trade	FASHION & FOOTWEAR	Retail						3,036	Local
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						1,517	
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail						2,149	Local
49	Transportation and warehousing	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						17,090	
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						1,900	
44	Retail trade	PHARMACY	Retail						2,926	Local
72	Accommodation and food services	ARTS & ENTERTAINMENT	Retail						1,399	Local
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						640	
81	Other services (except public administration)	PERSONAL SERVICE	Retail						1,696	Local
44	Retail trade	HOME FURNITURE & DÉCOR	Retail						11,284	Brand
81	Other services (except public administration)	PERSONAL SERVICE	Retail						4,054	Local
21	Mining, quarrying, and oil and gas extraction	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						2,091	
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						3,778	
56	Administrative and support, waste manageme	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						3,388	
44	Retail trade	FASHION & FOOTWEAR	Retail						4,714	Local
81	Other services (except public administration)	PERSONAL SERVICE	Retail						2,198	Local
44	Retail trade	HOME IMPROVEMENT & GARDENING	Retail						7,468	Local
72	Accommodation and food services	QUICK SERVICE F&B	Retail						1,933	Local
81	Other services (except public administration)	AUTO SERVICE	Auto						5,751	
44	Retail trade	HOME FURNITURE & DÉCOR	Retail						3,725	Local
									7,741	
72	Accommodation and food services	QUICK SERVICE F&B	Retail						1,871	Brand
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						1,501	
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						1,656	
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical							
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						1,145	
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						1,665	
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						2,927	
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						1,593	
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						2,553	
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail						4,411	Local
53	Real estate and rental and leasing	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						1,586	
61	Educational services	FITNESS & LEISURE	Retail						25,795	Local
45	Retail trade	SPORTING GOODS & OUTDOOR RECREATION	Retail						5,474	Local
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						1,576	
44	Retail trade	PHARMACY	Retail						1,000	Local
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail						2,578	Brand
44	Retail trade	AUTO FUEL	Auto						1,638	
81	Other services (except public administration)	AUTO PARTS & ACCESSORIES	Auto						2,859	Local
81	Other services (except public administration)	PERSONAL SERVICE	Retail						1,726	Local
									1,744	
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail						1,119	Local
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical						6,636	
44	Retail trade	HOME FURNITURE & DÉCOR	Retail						6,973	Local
45	Retail trade	GENERAL MERCHANDISE	Retail						11,534	Brand
		Alcohol, Tobacco & Cannabis							0	
		Arts & Entertainment							0	
		Auto Parts & Accessories							0	
		Auto Service							0	
		Auto/RV/Motorsports Dealership							0	
		Beauty & Wellness							865	

NAICS 2-DIGIT	NAICS 2-DIGIT CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	BROAD MARKET CATEGORY	TENANT NAME	UNIT OR CIVIC NUMBER	STREET ADDRESS	Street Name	Node	Total business size (sf)	Branded Chain or Local Business
		Books, Media & Computers		[redacted]					0	
		Electronics & Appliances		[redacted]					577	
		Fashion & Footwear		[redacted]					5,767	
		Full Service Restaurants & Pubs		[redacted]					0	
		Grocery, Convenience & Specialty Foods		[redacted]					1,153	
		Home Furniture & Décor		[redacted]					577	
		Home Improvement & Gardening		[redacted]					577	
		Jewelry & Accessories		[redacted]					288	
		Personal Service		[redacted]					0	
		Pharmacy		[redacted]					0	
		Quick Service F&B		[redacted]					0	
		Specialty Retail		[redacted]					577	
		Sporting Goods & Outdoor Recreation		[redacted]					577	
		Toys & Hobbies		[redacted]					577	
44	Retail trade	AUTO PARTS & ACCESSORIES	Auto	[redacted]					6,213	Brand
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					1,943	Local
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]					904	Local
				[redacted]					1,643	
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					1,017	
44	Retail trade	JEWELRY & ACCESSORIES	Retail	[redacted]					3,621	Local
31	Manufacturing	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail	[redacted]					1,888	Local
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail	[redacted]					827	Local
44	Retail trade	FASHION & FOOTWEAR	Retail	[redacted]					5,513	Local
45	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					1,216	Local
62	Health care and social assistance	PERSONAL SERVICE	Retail	[redacted]					3,050	Local
				[redacted]					926	
				[redacted]					3,678	
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]					4,266	
56	Administrative and support, waste manageme	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					1,581	
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]					2,039	Local
45	Retail trade	SPECIALTY RETAIL	Retail	[redacted]					1,654	Local
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]					2,657	Local
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					3,603	Brand
				[redacted]					3,542	
				[redacted]					3,052	
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					1,334	
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]					4,536	Local
32	Manufacturing	SPECIALTY RETAIL	Retail	[redacted]					4,988	Local
45	Retail trade	HOME FURNITURE & DÉCOR	Retail	[redacted]					1,895	Local
33	Manufacturing	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					498	
56	Administrative and support, waste manageme	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					4,424	
45	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					2,638	Local

NAICS 2-DIGIT	NAICS 2-DIGIT CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	BROAD MARKET CATEGORY	TENANT NAME	UNIT OR CIVIC NUMBER	STREET ADDRESS	Street Name	Node	Total business size (sf)	Branded Chain or Local Business
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					4,539	
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					1,492	
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					3,790	
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					1,160	
44	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					786	Local
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]					2,324	Local
51	Information and cultural industries	ARTS & ENTERTAINMENT	Retail	[redacted]					19,511	Local
81	Other services (except public administration)	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					9,811	
			Office & Medical	[redacted]					4,477	
			Office & Medical	[redacted]					4,287	
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					1,596	
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					5,397	
81	Other services (except public administration)	BEAUTY & WELLNESS	Retail	[redacted]					2,446	Local
71	Arts, entertainment and recreation	FITNESS & LEISURE	Retail	[redacted]					4,034	Local
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]					3,177	Local
			Office & Medical	[redacted]					3,774	
			Office & Medical	[redacted]					7,209	
44	Retail trade	HOME FURNITURE & DÉCOR	Retail	[redacted]					4,312	Local
21	Mining, quarrying, and oil and gas extraction	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					5,657	
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]					625	Local
44	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					2,855	Local
44	Retail trade	FASHION & FOOTWEAR	Retail	[redacted]					1,774	Local
45	Retail trade	SPORTING GOODS & OUTDOOR RECREATION	Retail	[redacted]					3,241	Local
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					8,305	
49	Transportation and warehousing	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					4,719	
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					2,636	
				[redacted]					25,689	
44	Retail trade	ELECTRONICS & APPLIANCES	Retail	[redacted]					2,032	Local
				[redacted]					6,887	
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					8,910	
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					4,444	
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					1,806	
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]					2,136	Local
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					926	
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					4,805	
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					14,288	
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					895	
61	Educational services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					1,800	
45	Retail trade	SPECIALTY RETAIL	Retail	[redacted]					769	Local
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					39,064	
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					8,415	
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]					1,545	Local
44	Retail trade	HOME IMPROVEMENT & GARDENING	Retail	[redacted]					0	Local
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]					1,407	Local
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					320	
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					0	
				[redacted]					0	
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					0	
51	Information and cultural industries	ELECTRONICS & APPLIANCES	Retail	[redacted]					3,198	Brand
45	Retail trade	ELECTRONICS & APPLIANCES	Retail	[redacted]					4,796	Local
45	Retail trade	SPECIALTY RETAIL	Retail	[redacted]					2,264	Local
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]					1,250	Local
44	Retail trade	FASHION & FOOTWEAR	Retail	[redacted]					0	Local
45	Retail trade	SPECIALTY RETAIL	Retail	[redacted]					320	Local
45	Retail trade	Fashion & Footwear	Retail	[redacted]					2,216	
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					0	
45	Retail trade	SPORTING GOODS & OUTDOOR RECREATION	Retail	[redacted]					5,989	Brand
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					6,395	
45	Retail trade	SPECIALTY RETAIL	Retail	[redacted]					320	Local
44	Retail trade	FASHION & FOOTWEAR	Retail	[redacted]					320	Local
81	Other services (except public administration)	ELECTRONICS & APPLIANCES	Retail	[redacted]					320	Local
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]					3,935	Local
0	Vacant	VACANT	Vacant	[redacted]					0	
0	Vacant	VACANT	Vacant	[redacted]					0	
0	Vacant	VACANT	Vacant	[redacted]					0	
0	Vacant	VACANT	Vacant	[redacted]					2,216	
0	Vacant	VACANT	Vacant	[redacted]					4,433	

NAICS 2-DIGIT	NAICS 2-DIGIT CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	BROAD MARKET CATEGORY	TENANT NAME	UNIT OR CIVIC NUMBER	STREET ADDRESS	Street Name	Node	Total business size (sf)	Branded Chain or Local Business
0	Vacant	VACANT	Vacant	[redacted]					0	
0	Vacant	VACANT	Vacant	[redacted]					8,866	
0	Vacant	VACANT	Vacant	[redacted]					0	
0	Vacant	VACANT	Vacant	[redacted]					887	
0	Vacant	VACANT	Vacant	[redacted]					0	
0	Vacant	VACANT	Vacant	[redacted]					991	
0	Vacant	VACANT	Vacant	[redacted]					1,016	
0	Vacant	VACANT	Vacant	[redacted]					0	
0	Vacant	VACANT	Vacant	[redacted]					11,082	
0	Vacant	VACANT	Vacant	[redacted]					0	
0	Vacant	VACANT	Vacant	[redacted]					8,866	
0	Vacant	VACANT	Vacant	[redacted]					6,286	
0	Vacant	VACANT	Vacant	[redacted]					2,110	
0	Vacant	VACANT	Vacant	[redacted]					1,712	
0	Vacant	VACANT	Vacant	[redacted]					4,433	
0	Vacant	VACANT	Vacant	[redacted]					887	
0	Vacant	VACANT	Vacant	[redacted]					443	
0	Vacant	VACANT	Vacant	[redacted]					0	
0	Vacant	VACANT	Vacant	[redacted]					0	
0	Vacant	VACANT	Vacant	[redacted]					2,845	
0	Vacant	VACANT	Vacant	[redacted]					1,886	
		VACANT	Vacant	[redacted]					3,877	Local
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					2,510	
45	Retail trade	SPECIALTY RETAIL	Retail	[redacted]					2,885	Local
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]					1,684	Brand
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					1,120	
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					3,225	
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]					3,045	Local
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					524	
44	Retail trade	AUTO PARTS & ACCESSORIES	Auto	[redacted]					5,270	Local

NAICS 2-DIGIT	NAICS 2-DIGIT CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	BROAD MARKET CATEGORY	TENANT NAME	UNIT OR CIVIC NUMBER	STREET ADDRESS	Street Name	Node	Total business size (sf)	Branded Chain or Local Business
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					2,468	
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					1,233	
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					1,486	Brand
45	Retail trade	TOYS & HOBBIES	Retail	[redacted]					3,669	Local
44	Retail trade	AUTO PARTS & ACCESSORIES	Auto	[redacted]					5,107	Local
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY	Retail	[redacted]					1,462	Brand
44	Retail trade	AUTO FUEL	Auto	[redacted]					1,411	
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]					12,241	
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]					6,035	
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY	Retail	[redacted]					2,573	Brand
44	Retail trade	AUTO FUEL	Auto	[redacted]					861	
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]					2,740	Local
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]					9,406	
81	Other services (except public administration)	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					4,604	
81	Other services (except public administration)	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					975	
45	Retail trade	SPECIALTY RETAIL	Retail	[redacted]					1,171	Local
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY	Retail	[redacted]					2,736	Brand
44	Retail trade	AUTO FUEL	Auto	[redacted]					291	
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY	Retail	[redacted]					2,753	Brand
44	Retail trade	AUTO FUEL	Auto	[redacted]					2,321	
51	Information and cultural industries	ELECTRONICS & APPLIANCES	Retail	[redacted]					16,927	Brand
23	Construction	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					2,539	
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]					18,025	
45	Retail trade	HOME FURNITURE & DECOR	Retail	[redacted]					9,667	Local
45	Retail trade	SPECIALTY RETAIL	Retail	[redacted]					1,346	Brand
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]					1,551	
62	Health care and social assistance	PERSONAL SERVICE	Retail	[redacted]					1,893	Local
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					2,133	
44	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					2,191	Local
41	Wholesale trade	GROCERY, CONVENIENCE & SPECIALTY	Retail	[redacted]					12,117	Brand
61	Educational services	FITNESS & LEISURE	Retail	[redacted]					1,657	Local
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					2,767	Brand
61	Educational services	FITNESS & LEISURE	Retail	[redacted]					3,586	Local
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					2,142	Local
0	Vacant	VACANT	Vacant	[redacted]					2,705	
0	Vacant	VACANT	Vacant	[redacted]					5,291	
0	Vacant	VACANT	Vacant	[redacted]					1,951	
0	Vacant	VACANT	Vacant	[redacted]					2,181	
0	Vacant	VACANT	Vacant	[redacted]					7,186	
0	Vacant	VACANT	Vacant	[redacted]					8,419	
0	Vacant	VACANT	Vacant	[redacted]					1,559	
0	Vacant	VACANT	Vacant	[redacted]					10,895	
0	Vacant	VACANT	Vacant	[redacted]					5,054	

NAICS 2-DIGIT	NAICS 2-DIGIT CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	BROAD MARKET CATEGORY	TENANT NAME	UNIT OR CIVIC NUMBER	STREET ADDRESS	Street Name	Node	Total business size (sf)	Branded Chain or Local Business
62	Health care and social assistance	PERSONAL SERVICE	Retail	[redacted]					9,222	Local
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					2,810	
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					3,263	
44	Retail trade	HOME FURNITURE & DECOR	Retail	[redacted]					1,313	Local
45	Retail trade	SPECIALTY RETAIL	Retail	[redacted]					2,907	Local
44	Retail trade	HOME FURNITURE & DECOR	Retail	[redacted]					12,403	Brand
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					1,476	
23	Construction			[redacted]					9,502	
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					6,464	
45	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					1,848	Local
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					4,031	
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					1,375	
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					6,031	
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					2,069	Local
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]					1,010	Brand
53	Real estate and rental and leasing	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					3,250	
44	Retail trade	BEAUTY & WELLNESS	Retail	[redacted]					3,274	Brand
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]					4,942	Brand
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					1,147	
44	Retail trade	HOME IMPROVEMENT & GARDENING	Retail	[redacted]					5,236	Local
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					4,334	
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					1,896	
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail	[redacted]					2,611	Local
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					3,856	
45	Retail trade	SPECIALTY RETAIL	Retail	[redacted]					8,081	Brand
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					2,600	
45	Retail trade	SPORTING GOODS & OUTDOOR RECREATION	Retail	[redacted]					4,813	Local
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]					1,138	Local
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]					1,023	Local
81	Other services (except public administration)	ELECTRONICS & APPLIANCES	Retail	[redacted]					1,825	Brand
81	Other services (except public administration)	BEAUTY & WELLNESS	Retail	[redacted]					3,320	Brand
45	Retail trade	TOYS & HOBBIES	Retail	[redacted]					3,695	Local
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]					1,146	Local
71	Arts, entertainment and recreation	FITNESS & LEISURE	Retail	[redacted]					3,974	Local
45	Retail trade	SPECIALTY RETAIL	Retail	[redacted]					2,211	Local
62	Health care and social assistance	PERSONAL SERVICE	Retail	[redacted]					4,319	Local
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail	[redacted]					29,803	Brand
53	Real estate and rental and leasing	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					2,058	
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					1,850	Brand
44	Retail trade	FASHION & FOOTWEAR	Retail	[redacted]					1,839	Local
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					3,003	Brand
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					2,997	
44	Retail trade	FASHION & FOOTWEAR	Retail	[redacted]					12,967	Brand
			Office & Medical	[redacted]					5,831	
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					2,030	Brand
45	Retail trade	SPECIALTY RETAIL	Retail	[redacted]					5,812	Local
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail	[redacted]					2,999	Local
71	Arts, entertainment and recreation	FITNESS & LEISURE	Retail	[redacted]					5,328	Local
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					25,259	

NAICS 2-DIGIT	NAICS 2-DIGIT CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	BROAD MARKET CATEGORY	TENANT NAME	UNIT OR CIVIC NUMBER	STREET ADDRESS	Street Name	Node	Total business size (sf)	Branded Chain or Local Business
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					1,144	Brand
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					1,425	Local
44	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					4,441	Brand
44	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					6,044	Brand
81	Other services (except public administration)	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					1,766	
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					3,193	Local
51	Information and cultural industries	ELECTRONICS & APPLIANCES	Retail	[redacted]					3,717	Brand
44	Retail trade	FASHION & FOOTWEAR	Retail	[redacted]					4,308	Local
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					3,000	
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					2,992	Brand
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					3,750	
45	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					1,825	Local
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]					3,337	Local
0		VACANT	Vacant	[redacted]					2,123	
0		VACANT	Vacant	[redacted]					6,877	
0		VACANT	Vacant	[redacted]					1,041	
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					1,393	Brand
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					3,093	
44	Retail trade	HOME IMPROVEMENT & GARDENING	Retail	[redacted]					14,080	Brand
				[redacted]					1,021	
				[redacted]					5,342	
45	Retail trade	SPECIALTY RETAIL	Retail	[redacted]					7,505	Brand

NAICS 2-DIGIT	NAICS 2-DIGIT CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	BROAD MARKET CATEGORY	TENANT NAME	UNIT OR CIVIC NUMBER	STREET ADDRESS	Street Name	Node	Total business size (sf)	Branded Chain or Local Business
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail	[redacted]					3,340	Brand
44	Retail trade	AUTO FUEL	Auto	[redacted]					2,800	
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					3,197	Brand
31	Manufacturing	QUICK SERVICE F&B	Retail	[redacted]					4,362	Local
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail	[redacted]					2,341	Brand
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					2,252	Brand
44	Retail trade	HOME FURNITURE & DÉCOR	Retail	[redacted]					4,188	Local
				[redacted]					1,099	
				[redacted]					4,327	
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]					1,666	Brand
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]					3,808	
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					5,116	
53	Real estate and rental and leasing			[redacted]					2,067	
45	Retail trade	TOYS & HOBBIES	Retail	[redacted]					5,485	Local
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					2,495	
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]					1,914	Local
45	Retail trade	SPECIALTY RETAIL	Retail	[redacted]					2,945	Brand
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					6,212	
45	Retail trade	SPORTING GOODS & OUTDOOR RECREATION	Retail	[redacted]					6,767	Local
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					501	Brand
44	Retail trade	PHARMACY	Retail	[redacted]					6,736	Brand
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					1,443	
44	Retail trade	AUTO/RV/MOTORSPORTS DEALERSHIP	Retail	[redacted]					25,711	Brand
44	Retail trade	AUTO/RV/MOTORSPORTS DEALERSHIP	Retail	[redacted]					24,769	Brand
44	Retail trade	AUTO PARTS & ACCESSORIES	Auto	[redacted]					10,486	Brand
45	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					859	Local
53	Real estate and rental and leasing	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					4,792	
81	Other services (except public administration)	AUTO PARTS & ACCESSORIES	Auto	[redacted]					4,846	Local
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					1,574	
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]					10,057	
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					2,618	
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					2,508	
61	Educational services	ARTS & ENTERTAINMENT	Retail	[redacted]					1,850	Local
44	Retail trade	BEAUTY & WELLNESS	Retail	[redacted]					2,757	Brand
44	Retail trade	HOME IMPROVEMENT & GARDENING	Retail	[redacted]					4,610	Local
				[redacted]					7,972	
44	Retail trade	HOME FURNITURE & DÉCOR	Retail	[redacted]					821	Local
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					2,312	
45	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					2,336	Local
44	Retail trade	AUTO/RV/MOTORSPORTS DEALERSHIP	Retail	[redacted]					24,562	Brand
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					951	
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]					7,874	
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					4,678	
44	Retail trade	HOME IMPROVEMENT & GARDENING	Retail	[redacted]					9,627	Brand
53	Real estate and rental and leasing	AUTO SERVICE	Auto	[redacted]					2,044	
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]					1,174	Brand
44	Retail trade	HOME IMPROVEMENT & GARDENING	Retail	[redacted]					8,198	Brand
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					1,761	
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					2,036	

NAICS 2-DIGIT	NAICS 2-DIGIT CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	BROAD MARKET CATEGORY	TENANT NAME	UNIT OR CIVIC NUMBER	STREET ADDRESS	Street Name	Node	Total business size (sf)	Branded Chain or Local Business
53	Real estate and rental and leasing	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					769	
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					2,088	
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]					1,306	
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					4,949	
				[redacted]					642	
				[redacted]					3,236	
				[redacted]					942	
				[redacted]					1,356	
				[redacted]					1,229	
				[redacted]					2,448	
				[redacted]					6,739	
				[redacted]					13,520	
				[redacted]					1,971	
				[redacted]					1,226	
44	Retail trade	HOME IMPROVEMENT & GARDENING	Retail	[redacted]					51,601	Brand
71	Arts, entertainment and recreation	FITNESS & LEISURE	Retail	[redacted]					8,501	Local
71	Arts, entertainment and recreation	ARTS & ENTERTAINMENT	Retail	[redacted]					1,897	Local
				[redacted]					3,933	
				[redacted]					14,502	
				[redacted]					5,696	
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					7,662	
44	Retail trade	BEAUTY & WELLNESS	Retail	[redacted]					1,979	Brand
61	Educational services	FITNESS & LEISURE	Retail	[redacted]					875	Local
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					2,086	
81	Other services (except public administration)	ELECTRONICS & APPLIANCES	Retail	[redacted]					1,428	Local
61	Educational services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					787	
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					811	
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					6,788	
44	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					1,701	Local
44	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					4,537	Local
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]					6,387	
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					2,070	
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]					835	Local
81	Other services (except public administration)	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					2,028	
44	Retail trade	AUTO/RV/MOTORSPORTS DEALERSHIP	Retail	[redacted]					15,054	Brand
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]					2,522	Local
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]					1,744	Local
44	Retail trade	HOME FURNITURE & DÉCOR	Retail	[redacted]					870	Local
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					2,616	Local
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					1,547	Brand
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					2,525	
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					5,986	Brand
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					3,502	
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					5,349	
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]					11,850	
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail	[redacted]					5,217	Brand
		PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					12,304	
44	Retail trade	AUTO/RV/MOTORSPORTS DEALERSHIP	Retail	[redacted]					8,334	Brand
44	Retail trade	HOME IMPROVEMENT & GARDENING	Retail	[redacted]					2,066	Local
81	Other services (except public administration)	BEAUTY & WELLNESS	Retail	[redacted]					4,740	Local
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail	[redacted]					3,966	Brand
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					1,746	Brand
44	Retail trade	HOME IMPROVEMENT & GARDENING	Retail	[redacted]					7,787	Brand
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]					9,484	
41	Wholesale trade	ELECTRONICS & APPLIANCES	Retail	[redacted]					1,910	Local
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]					3,852	

NAICS 2-DIGIT	NAICS 2-DIGIT CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	BROAD MARKET CATEGORY	TENANT NAME	UNIT OR CIVIC NUMBER	STREET ADDRESS	Street Name	Node	Total business size (sf)	Branded Chain or Local Business
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					5,162	
71	Arts, entertainment and recreation	FITNESS & LEISURE	Retail	[redacted]					3,563	Local
41	Wholesale trade	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					3,776	
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]					6,170	
44	Retail trade	HOME FURNITURE & DÉCOR	Retail	[redacted]					1,581	Brand
51	Information and cultural industries	ELECTRONICS & APPLIANCES	Retail	[redacted]					2,982	Local
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					2,340	Brand
44	Retail trade	AUTO/RV/MOTORSPORTS DEALERSHIP	Retail	[redacted]					9,794	Local
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					8,504	
45	Retail trade	TOYS & HOBBIES	Retail	[redacted]					6,741	Local
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail	[redacted]					1,124	Brand
44	Retail trade	AUTO FUEL	Auto	[redacted]					2,150	
				[redacted]					6,813	
44	Retail trade	AUTO/RV/MOTORSPORTS DEALERSHIP	Retail	[redacted]					13,382	Brand
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					3,157	
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]					7,249	Local
23	Construction			[redacted]					3,786	
41	Wholesale trade	HOME IMPROVEMENT & GARDENING	Retail	[redacted]					3,748	Brand
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					1,696	Brand
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					3,373	
44	Retail trade	BEAUTY & WELLNESS	Retail	[redacted]					1,369	Local
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					866	
45	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail	[redacted]					1,229	Brand
72	Accommodation and food services	FULL SERVICE RESTAURANTS & PUBS	Retail	[redacted]					1,272	Local
44	Retail trade	AUTO PARTS & ACCESSORIES	Auto	[redacted]					10,930	Local
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					3,083	Brand
44	Retail trade	AUTO/RV/MOTORSPORTS DEALERSHIP	Retail	[redacted]					20,190	Brand
54	Professional, scientific and technical services	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					3,599	
				[redacted]					4,073	
0	Vacant	VACANT	Vacant	[redacted]					769	
0	Vacant	VACANT	Vacant	[redacted]					4,717	
0	Vacant	VACANT	Vacant	[redacted]					1,429	
0	Vacant	VACANT	Vacant	[redacted]					2,089	
0	Vacant	VACANT	Vacant	[redacted]					4,255	
0	Vacant	VACANT	Vacant	[redacted]					1,093	
0	Vacant	VACANT	Vacant	[redacted]					1,228	
0	Vacant	VACANT	Vacant	[redacted]					7,116	
0	Vacant	VACANT	Vacant	[redacted]					2,295	
0	Vacant	VACANT	Vacant	[redacted]					1,210	
0	Vacant	VACANT	Vacant	[redacted]					2,026	
0	Vacant	VACANT	Vacant	[redacted]					2,492	
23	Construction			[redacted]					2,135	
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					6,041	
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					1,759	
81	Other services (except public administration)	PERSONAL SERVICE	Retail	[redacted]					4,727	Local
44	Retail trade			[redacted]					3,881	
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					5,123	
44	Retail trade	AUTO/RV/MOTORSPORTS DEALERSHIP	Retail	[redacted]					23,942	Brand
62	Health care and social assistance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					2,302	
				[redacted]					4,474	

NAICS 2-DIGIT	NAICS 2-DIGIT CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	BROAD MARKET CATEGORY	TENANT NAME	UNIT OR CIVIC NUMBER	STREET ADDRESS	Street Name	Node	Total business size (sf)	Branded Chain or Local Business
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					2,719	Brand
44	Retail trade	ALCOHOL, TOBACCO & CANNABIS	Retail	[redacted]					4,408	Local
81	Other services (except public administration)	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					1,481	
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]					4,343	
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOOD	Retail	[redacted]					1,112	Brand
52	Finance and insurance	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					5,087	
71	Arts, entertainment and recreation	ARTS & ENTERTAINMENT	Retail	[redacted]					46,767	Local
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]					1,115	
48	Transportation and warehousing	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					31,502	
81	Other services (except public administration)	AUTO SERVICE	Auto	[redacted]					2,467	
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOOD	Retail	[redacted]					3,779	Local
44	Retail trade	AUTO FUEL	Auto	[redacted]					5,008	
91	Public administration	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					25,804	
44	Retail trade	AUTO/RV/MOTORSPORTS DEALERSHIP	Retail	[redacted]					10,107	Brand
71	Arts, entertainment and recreation	ARTS & ENTERTAINMENT	Retail	[redacted]					11,154	Local
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					1,469	Brand
41	Wholesale trade	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					2,207	
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOOD	Retail	[redacted]					2,884	Brand
44	Retail trade	AUTO FUEL	Auto	[redacted]					4,199	
81	Other services (except public administration)	PROFESSIONAL, MEDICAL & FINANCIAL	Office & Medical	[redacted]					1,861	
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOOD	Retail	[redacted]					1,061	Brand
44	Retail trade	AUTO FUEL	Auto	[redacted]					2,186	
44	Retail trade	ELECTRONICS & APPLIANCES	Retail	[redacted]					7,104	Local
72	Accommodation and food services	QUICK SERVICE F&B	Retail	[redacted]					2,532	Brand
0	Vacant	VACANT	Vacant	[redacted]					11,475	
0	Vacant	VACANT	Vacant	[redacted]					1,814	
0	Vacant	VACANT	Vacant	[redacted]					1,436	
44	Retail trade	GROCERY, CONVENIENCE & SPECIALTY FOOD	Retail	[redacted]					1,212	Local

Retail Gap Analysis

City of Lloydminster

October 2022