

# Retail and Commercial Gap Analysis

Town of Bonnyville

February 2024



Completed by:

**FBM**



Town of Bonnyville  
"It's Multi-Natural"

Completed for:



## Land Acknowledgment

FBM would like to respectfully acknowledge that the Town of Bonnyville is situated on Treaty 6 land that is steeped in rich Indigenous history and is the traditional homeland and home to First Nations and Metis people today. We respect the histories, languages and cultures of First Nations, Metis and all peoples of Canada whose presence continues to enrich our community.

*Adopted from: Town of Bonnyville's official land acknowledgment.*

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# Preface

Fowler Bauld & Mitchell Ltd. ("FBM") was commissioned by the Town of Bonnyville to conduct a commercial gap analysis for the Town. In addition to the core analysis, an online Consumer Survey was also conducted by FBM.

The study was carried out over the period of September 2023 to March 2024. On-the-ground fieldwork in the study community was carried out in September 2023.

The objective of this study is to thoroughly document the current business inventories and define the realistic Trade Areas for which they serve. The purpose of this research was to identify the existing gaps and opportunities for retail and commercial markets, which would also help the Town to identify investment and business attraction in support of the Town's Economic Development Strategic Plan.

Taking a collaborative approach, FBM analyzed the business inventory and consumers' spending patterns. 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 Town's business registry. However, some minor deviations exist based on our professional interpretation of the business typology, but these are minimal.

Any references to specific retailers do not represent a guarantee that they will locate in Bonnyville, but that they have been identified based on an understanding of their typical site and market selection criteria. As with most retailers, there will be a requirement to provide compatible locations and spaces for their respective formats.

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 expression of the Town of Bonnyville or FBM.

*FBM*

*2023/2024*

## Glossary of Terms & Acronyms

**sf** - square feet

**psf** - per square foot

**\$ psf** - dollars per square foot (an industry standard measure of annualized retail sales productivity)

**ICSC** - International Council of Shopping Centers  
"Innovating Commerce Serving Communities"

**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/Limited 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.

**Occupancy Cost Ratio** - A comparison of a retailer's annual occupancy costs (including base and percentage rent, taxes, common area maintenance (CAM), insurance and marketing to its annual sales volume expressed as a percentage of occupancy costs to sales.

**In-line store** - A retail outlet placed contiguous to neighbouring retailers such that their frontages are in a straight line and behind what is considered a leaseline.

**Psychographics/Lifestyle Segmentation** - The motivational forces that influence shopping patterns and consumer behaviour.

Figure P-1. Retail Merchandise Category Sorting Breakdown



# Executive Summary

## Introduction

Bonnyville is a town located in the northeast of Edmonton, situated between Cold Lake and St. Paul. The Town is surrounded by the Municipal District (MD) of Bonnyville No. 87.

Estimated for the year-end 2022, the population of the Primary Trade Area (PTA) is 27,239 and is projected to grow by 0.84% annually over the next five years. The PTA is demographically similar to Alberta with a slightly lower percentage of people aged between 25-34 and a slightly higher percentage of people aged 65 and over. The average household income of the PTA is \$140,344.

Estimated for the year-end 2022, the population of the Secondary Trade Area (STA) is 22,291 and projected to grow by 0.78% annually over the next three years.

## Retail Spending Summary

Detailed information of retail spending within each Trade Area was collected from Manifold Data Mining Inc., a leading supplier of demographic and consumer expenditure information, using 2021 year end data. The data was further consolidated into 22 specific spending categories in order to build a spending profile for the Trade Areas.

Bonnyville's PTA represents 52% of the overall retail spending. Total aggregate retail spending for 2023 was \$432 million excluding health care and auto. Grocery, Convenience and Specialty Foods represent the highest household spending category at \$12,352 and Household spending on Auto/RV/Motorsports was the second highest spending category (\$8,393).

**The PTA spending is expected to increase to \$485 million by 2028 and \$545 million by 2033.**

Representing 43% of the overall retail spending, STA aggregate retail spending for 2023 was \$346 million, excluding health care and auto.

Like the PTA, household spending category amongst STA residents was highest among the categories of Grocery, Convenience and Specialty Foods (\$11,365) and Auto/RV/Motorsports Dealership (\$9,601). As of 2023, spending in the broad merchandise categories of Grocery & Conveniences and Comparison Merchandise are comparable at \$149 and \$144 million respectively.

**Total STA spending is expected to increase to \$387 million by 2028 and \$432 million by 2033.**

Miscellaneous inflow spending accounts for a small percentage (5%) of overall Trade Area retail spending. In broad terms miscellaneous inflow is derived from passing motorists, visitors, or infrequent residents from outside of the Primary or Secondary Trade Areas.

Total retail miscellaneous inflow spending for 2023 was \$43.3 million and is expected to increase to \$48.6 million by 2028 and \$54.4 million by 2033.

## Retail Market Summary

Bonnyville's retail supply consists of three primary nodes:

- *Central:* 55 Street to 46 Street
- *West:* west of 55 Street
- *East:* east of 46 Street

The summary of the current inventory illustrates a total ground floor commercial space of 1,286,629 sf. This floorspace includes Community Service, Professional & Financial Services as well as Medical & Wellness Services. When excluding these "non-retail" segments, as well as automotive categories, the "retail only" inventory equates to 604,462 sf.

The Top 5 retail categories (excluding Professional & Financial Services and Auto) in terms of overall retail floor space are:

1. Grocery, Convenience & Specialty Foods (124,977 sf)
2. Full Service F&B (81,083 sf)
3. Home Improvement & Gardening (73,855 sf)
4. Limited Service F&B (72,330 sf)
5. Fashion & Footwear (42,342 sf)

A review of the current vacancy and nature of the vacancies provides additional cues for prospective business interests in the community. The current overall vacancy is estimated at 2.2%. This vacancy is very positive and suggests healthy retail market with opportunity to support new demand for retail space. As an industrial-accepted comparable, 4-5% is considered a healthy retail environment.

## Consumer Survey Summary

Approximately 78% of resident respondents prefer to shop for day-to-day conveniences in the Town, while an additional 19% of residents prefer to shop in Cold Lake. Comparatively, 21% of respondents prefer to shop in Town for bigger ticket items. For these larger purchases, 33% prefer to go to Edmonton while an additional 30% prefer to go to Cold Lake.

Of non-resident respondents, most (82%) visit Town shops and services because they live in the area. Less than half (44%) work or own a business in the area or visit the hospital or other medical services (39%).

The responses from the respondents with respect to their spending habits “inside” of Bonnyville illustrate a lower than expected sales retention in the conveniences category at less than 55%. This suggests that the market might benefit from increased competition in this sector to retain more spending (i.e. Coop Grocery). Conversely, the food & beverage spending retention is quite healthy and suggests that any prospecting should be well targeted. The recent additions of Boston Pizza and Mary Brown’s are likely contributors to increasing spending inside Bonnyville.

Not unexpectedly, the role of on-line spending continues to be a factor, where it would seem that the online spending in Bonnyville is higher than the national average, which is estimated to be around 8% - 10%. In a rural or secondary market, this is a common trend where categories such as Fashion, Home & Decor, Home & Personal Electronics and Sporting Goods, Books & Hobbies are prominent.

Survey respondents frequently commented on the lack of retail variety and centralized shopping in the Town of Bonnyville. The neighbouring communities of Cold Lake and St. Paul were consistently seen as better places to shop to save money and access a greater retail variety for daily goods and services.

## Retail Demand Summary

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 look at the notion of achieving a greater market share of the existing spending for categories that represent strength today. In particular, a greater market share will need to apply to the local and surrounding trade area, given what seems to be an underachieving overall sales retention estimated to be in the range of 36.4%.**

As a comparison, comparably sized communities to Bonnyville in the region may have a retention rate of 40% to 45%, which suggests that Bonnyville is under-retailed given its healthy trade area attributes.

**Forecasts to 2033 premised on conservative, maintained rates of market share reveal demand for just under 200,000 sf of new floorspace.**

**It would be reasonable to allocate a need for 5 to 10 acres of potential new land, assuming that 150,000 sf or more of the new floorspace would be occupied in new development, most likely at the already zoned and ready-to-build East Gate lands.**

If the retained market shares discussed previously were to increase by 5%, the total demand by the year 2033, based on conservative population growth, **but with spending growth and increased retention could result in incremental new space of approximately 291,977 sf, or more than 100,000 sf than if the current market shares are maintained.**

## Conclusion

Bonnyville is in the fortunate position to have very few vacancies and therefore much of the forecast demand could reasonably and realistically be accommodated in new builds, which would increase the town’s commercial tax base while enhancing the marketability for prospective retailers, while leaving some of the older vacancies more attractive for new local startups or entrepreneurial enterprises. While in many rural markets retail growth is not always about adding new retail, but creating an environment for stronger retention and performance of existing businesses, Bonnyville is a market that has a stable and strong trade area, and room for growth.

**The retail demand forecasts suggest a good opportunity for future retail and there are tenants capable of moving the needle for sales retention and attraction in Bonnyville. Most notably, these include Walmart, Canadian Tire, Giant Tiger, Dollar Tree, Value Village, JYSK and Bulk Barn, to name a few.**

The online survey respondents as well as FBM’s network of retailers and broker contacts, sheds some light as to the future compatible businesses for Bonnyville, though there is no guarantee that they will locate with any sense of urgency. To be successful in attracting these store types or brands it will be necessary to increase the market share of trade area retail spending, and especially the Primary Trade Area.

EASTGATE



**Boston Pizza**

RESTAURANT & SPORTS BAR



**Comfort**  
INN & SUITES



# 1.0 Introduction

## 1.1 Scope of Study

Fowler Bauld & Mitchell Ltd. (“FBM”) was commissioned by the Town of Bonnyville to conduct a Retail Commercial Gap analysis to explore the current and future retail and commercial opportunities.

The objective of this study is to thoroughly document the current business inventories and define the realistic Trade Areas for which they serve. The purpose of this research was to identify the existing gaps and opportunities for retail and commercial markets, which would also help the Town to identify investment and business attraction in support of the Town’s Economic Development Strategic Plan.

The study was carried out over the period of September 2023 to March 2024. On-the-ground fieldwork in the study community was carried out in September 2023.

## 1.2 Report Structure

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

**Section 2 - Regional and Local Context:** Lays out the important regional and local context of the Town of Bonnyville in terms of geographic location, regional access and traffic counts, including relevant plans, studies and initiatives.

**Section 3 - Trade Area:** Identifies and defines the Town’s Trade Area and demographics including retail spending.

**Section 4 - Commercial Supply:** Provides a detailed documentation, tabulation and summary of the Town of Bonnyville’s predominantly ground oriented retail and commercial business mix. This section also assesses the location and characteristics of Bonnyville’s current nodes of retail activity (“supply”), including developing or future planned retail sites. Fieldwork assessments included identifying and documenting in detail the Town’s retail inventory by retailer, merchandise category and NAICS industry classification.

**Section 5 - Resident and Consumer Survey:** Introduces and analyzes the results of the resident and consumer survey for the Town of Bonnyville.

**Section 6 - Market Demand Assessment:** Based on an extensive assessment of the current “supply” and Trade Area spending, the current demand is then estimated and measured against the market potential. This quantifies future retail demand over the next 10 years.

**Section 7 - Key Findings:** Synthesizes gaps and opportunities for the retail and commercial market, and identifies strategic action steps ranging from now to short term and medium term that could be undertaken to strengthen existing businesses, while cultivating new businesses and investment activity.

# 2.0 Regional and Local Context

## 2.1 Introduction

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

## 2.2 Regional and Local Context

Bonnyville is a town located in the northeast of Edmonton, situated between Cold Lake and St. Paul. The Town is surrounded by the Municipal District (MD) of Bonnyville No. 87.

The Town of Bonnyville is located within Treaty 6 territory, which spans across present day Alberta and Saskatchewan (Figure 2-2).

Figure 2-1 provides a context map for the Town with the surrounding First Nations communities. The map illustrates that the Town is surrounded by a variety of First Nations communities, namely Cold Lake First Nations, Kehewin Cree Nation, and Frog Lake Nation.

Figure 2-2. Approximate Treaty 6 Boundaries

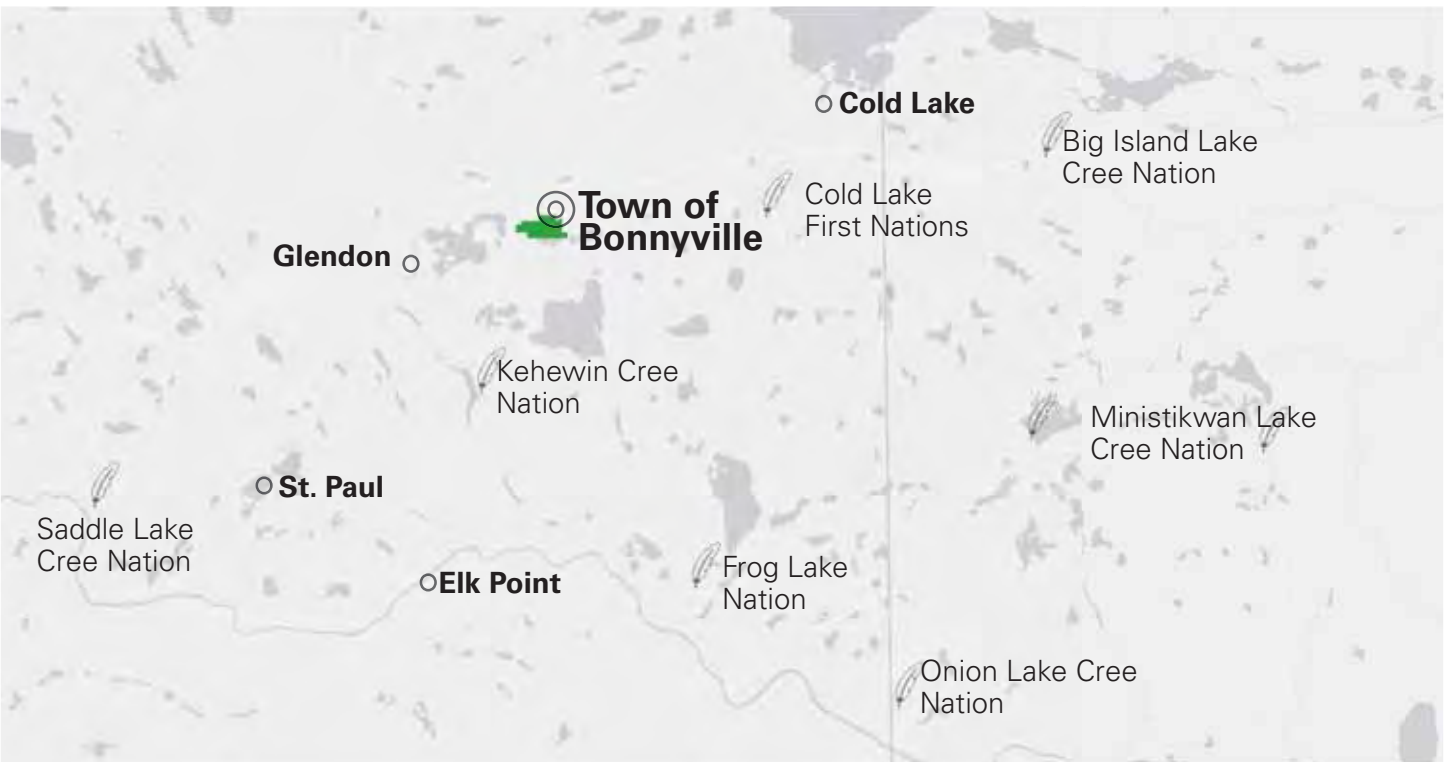
(Source: The Alberta Teacher's Association - Education for Reconciliation, Stepping Stones - Treaty 6)

Note: This map shows the approximate area of treaty land; there is no consensus between rights-holders and stakeholders about exact treaty boundaries.



Figure 2-1. Town of Bonnyville Context Map

(Source: Map Courtesy of Google Maps, edited by FBM)



## 2.3 Relevant Plans & Studies

This section examines relevant plans and policies that shape the current state of land use and growth planning. The background review is organized in the following hierarchy:

- Statutory Plans (Intermunicipal Development Plan, and Municipal Development Plan)
- Municipal Plans (Town of Bonnyville Strategic Plan, Action Plan, Economic Development Plan)
- Downtown ARP and Neighbourhood ASPs (as needed)

### 2.3.1 Statutory Plans

#### ***Intermunicipal Development Plan (IDP): Town of Bonnyville and Municipal District of Bonnyville No. 87 (2017)***

The purpose of the IDP was to offer a high-level land-use framework that would support growth of both the Municipal District of Bonnyville (MD) and the Town of Bonnyville (the Town).

The IDP was based on six guiding principles:

1. Maintain positive and mutually beneficial relationship between municipalities;
2. Reduce potential conflicts and encourage dialogue to understand the needs, desires, and aspirations of both communities;
3. Support mutually beneficial coordination and delivery of infrastructure and services that would provide economic development and growth for the two municipalities;
4. Confirm and support the continued future growth of the Town, including allowing the efficient expansion of the Town in the long term;
5. Promote and safeguard rural land uses and agriculture by maintaining areas for their continued use; and
6. Maintain continued support for the Bonnyville airport (p. 7).

The IDP identified several key constraints that development should consider. The Plan Area includes several waterbodies and wetlands, including Jessie Lake, Barreyre Lake, and Cold Lake Beaver River Basin. The Plan Area is also within two Environmentally Significant Areas (ESAs), both located on the south of Jessie Lake.

Additionally, the Plan Area included several pipelines and associated facilities that could pose a risk on the surrounding environment.

The IDP emphasized the importance of coordinating roles between the MD and the Town to diversify the economy instead of solely relying on oil and gas industries. The IDP identified tourism as a potential industry that could grow and play a vital role in highlighting the region's agricultural, recreational, and historical assets.

In addition to the economic development, the IDP also called for a coordinated approach for enhancing road network and infrastructure since these developments would likely involve two municipalities. The IDP also identified "Future Commercial Growth Area" (See Map 4: IDP Policy Areas), which included "future commercial lands adjacent to Highway 28" (p. 23). The IDP stated that this area would also support the potential "extension of future commercial growth adjacent to the Town's municipal boundaries" (p. 23).

#### ***Town of Bonnyville Municipal Development Plan (MDP, 2005)***

The MDP stated its role as offering "guidelines and directions for the Town of Bonnyville's future growth and development" (p. 1) for residents, developers, business groups, investors, and decision-makers including the Government of Canada, the Government of Alberta, and the MD of Bonnyville.

For commercial development, the MDP identified Downtown, West Approach, Commercial Fringe, and Commercial East as four commercial areas within the Town of Bonnyville. The MDP highlighted Downtown as the "commercial heart" of the Town and emphasized the aim of maintaining the compact, consistent, and walkable character of Downtown. Downtown could offer residential, recreational, institutional, and commercial uses to further promote the mix of land uses.

Unlike Downtown, West Approach is mostly dedicated for highway commercial uses. This area was highlighted as the "employment centre" of Bonnyville. The MDP emphasized that future commercial development should have a balanced inventory between Downtown and West Approach to maintain the vibrant community environment of both areas. The MDP also called for enhancing the aesthetics along Highway 28 (50th Avenue) by encouraging landowners and business owners to be consistently operating the properties and conforming with the design guideline.

The Commercial Fringe area is located along 50th and 54th Avenues. This area can accommodate commercial uses with higher land use density. For future development, the MDP highlighted that developers would need to respect the existing residential neighbourhoods in this area and ensure pedestrian linkage.

Commercial East offers the highway network, shopping centre, R.J. Lalonde Arena, and Agriplex. The MDP noted that the unique orientation of Highway 28 in this area could cause a challenge in accessing the areas, leading to longer development approval process. Future development would need to ensure that proposals would be compatible with the arena and agriplex, as well as the existing and proposed residential neighbourhoods in the east and south of this area.

### 2.3.2 Municipal Plans

#### ***Bonnyville Regional Economic Development Plan (2020)***

This Economic Development Plan was based on the motto “Be Bold, Bonnyville” and aimed to strengthen the economic base for the Town and the MD of Bonnyville. Like other plans, this Plan also addressed the need for economic diversification. The Plan emphasized that economic diversification would “not mean abandoning the oil and gas sector but instead transforming it and other economic drivers to create a more sustainable, diverse, and thriving regional economy” (p. 6).

The Plan conducted a survey on business owners. 89% of survey participants were either “somewhat satisfied” or “very satisfied” with having the MD or the Town as a place to operate their business. Out of the 83 business owners, twelve of them said that they were considering expanding their business and four relocating. Collectively, the business survey illustrated a promising trend toward community growth.

The Plan also included results from the resident survey. Participants said that the biggest barrier against starting their business was a lack of start-up capital. Residents also called for more actions to enhance tourism industry with more community events and outdoor activities (p. 20).

Based on the survey results and the SOARR (Strengths, Opportunities, Aspirations, Risks, and Results) Assessment, the Plan developed seven recommended actions:

1. **Amplify commitment to delivering economic development services:** ensure that policies and tools are present to support economic development and potential investors.
2. **Build confidence among businesses and partners:** strengthen communication system among all municipal departments; implement a Business Retention & Expansion program.
3. **Develop infrastructure for shovel-ready investment:** assess the capacities of the existing utilities and offer flexible land use plans, recognizing that development needs would change in response to population growth and climate events.
4. **Diversify existing industry sectors:** support key industry sectors including agriculture technology, retail and services, and oil and gas, by reaching out to relevant entrepreneurs and regional partners; offer training program that would fit with local needs.
5. **Support emerging industries:** these would include tourism, military procurement, and renewable energy sectors; explore opportunities and alternative options to expand these emerging industries.
6. **Celebrate the region’s advantages, innovations and points of pride:** build a brand for the Town to attract new residents, visitors, and investors.
7. **Inspire businesses, community leaders and citizens to act as investment ambassadors:** enhance local networks, encouraging new business owners and newcomers to be part of the network.

#### ***Town of Bonnyville Strategic Plan 2021-2031 (2022)***

The Plan offered the visioning statement as follows:

- The Town of Bonnyville is an inclusive community that fosters a culture of positivity, safety, and sustainability. It is a place that enables residents and businesses to thrive. The Town offers all that is required for individuals and families to grow and flourish. It is a place to call home. (p. 10)

The Plan highlighted that the Town of Bonnyville already offers strong opportunities for economic growth. Key factors included growing population, high quality of available services and resources, and strong culture of volunteerism. To enhance and promote the current community assets, the Plan offered five

“Priority Focus Areas” for the Town of Bonnyville, which all sought to work together to achieve the visioning statement.

1. **Economic Growth:** The Plan called for diversifying local economic opportunities and attracting new businesses. Recommended actions included developing a Long-Term Tax Strategy to communicate the uses of taxes to the residents and offering affordable housing which could make the Town an attractive place for future residents to live, work, and raise their families.
2. **Recreation and Wellness:** The Plan emphasized that community programs, services, sports facilities, amenities, and recreational outdoor spaces would play a vital role in offering a connected community environment.
3. **Communication Strategy:** The Plan called for using both traditional media (ex. local newspapers) and social media to reach out to diverse populations to share available services and resources and to allow the public to share their input on the existing services and community environment.
4. **Value-Added Services:** Develop value-added services and events that could offer a sense of local pride and culture. The Plan highlighted the possibility of exploring online communities, including online school platforms for youth to enhance education opportunities.
5. **Service Excellence:** continuously reflect on residents’ and business owners’ concerns and questions on services.

**Town of Bonnyville Vision Action Plan 2023-2026 (2023)**

The Vision Action Plan (Figure 2-3) listed recommended actions for the five Priority Focus Areas from the Strategic Plan (Economic Growth, Recreation and Wellness, Communications Strategy, Value-Added Services, and Service Excellence) for

the next four years. The action items were based on the capacity of the municipal budget, which consisted of “operating budget” and “capital budget”. The operating budget would cover day-to-day employment and utility costs of delivering municipal services and facilities. On the other hand, the capital budget would cover expenses for new developments for infrastructure, amenities, and facilities.

- **Economic Growth:** develop a tourism strategy; explore opportunities to offer and enhance tax incentive program; develop and implement Downtown Revitalization Strategic Plan; promote local businesses on the Town website.
- **Recreation and Wellness:** develop a Community Recreation Plan; plan two festivals per year (summer and winter) to attract tourists; establish a Recreation Committee which would consist of local stakeholders and organizations; improve the existing trails (ex. South Side Jesse Lake Trail).
- **Communications Strategy:** promote the history and heritage sites through social media and the Town website; implement the Rebranding Strategy.
- **Value-Added Services:** create a service inventory for the Town; promote and advertise local performers, artists, and musicians.
- **Service Excellence:** Monitor and upgrade the existing infrastructure as needed; launch community survey in a bi-annually basis.

Figure 2-3. Community Vision Plan Framework

(Source: Town of Bonnyville Vision Action Plan, 2023)



**Downtown Area Redevelopment Plan (ARP; 2009)**

The Downtown ARP aimed to guide land-use concepts and development directions for Downtown Bonnyville. The Plan highlighted that the rich history of Downtown Bonnyville had led Downtown the centre of commercial, administrative, and social activities, and for this reason, the Plan aimed to reestablish Downtown as a hub for the economic growth.

The vision for the Downtown ARP is “to provide direction to ensure that Downtown Bonnyville is a unique and vibrant area that provides an attractive and safe place for people to work, visit, shop, and live”.

The ARP emphasized that one of the current issues in Downtown Bonnyville is that many parcels have been “either vacant or used only for surface parking” (Section 4.4). Although the Downtown Area could offer commercial buildings up to four storeys in height, most of the buildings were low-rise buildings, indicating opportunities for intensification. Other opportunities included providing green spaces, a wider range of commercial services, a low level of lighting on 50 Avenue, and a lack of available surfaced parking for vehicles.

**Figure 2-5** and **Figure 2-6** illustrate the boundary of Downtown Bonnyville as well as the key “core area” and “sub areas” within Downtown.

**Figure 2-4. East Gate Boundary and Zoning**

(Source: East Gate ASP, 2010)

**East Gate Area Structure Plan (ASP; 2010)**

The vision for the 103 ha East Gate lands is to develop a new integrated community that includes a regional commercial area for Bonnyville combined with: compact residential uses; well connected open spaces; efficient vehicular and pedestrian circulation; well designed stormwater management; and integration into the existing transportation network, while meeting market demands.

Land uses for the area (**Figure 2-4**) include single family residential, multi-family residential, residential manufactured home development and a range of commercial uses oriented to the needs of local and regional residents and visitors. Additionally, the concept plan includes mixed-use residential/commercial as well as institutional (church, school, health services).

At buildout the East Gate ASP envisions a resident population of 2,190.

In the time since the adoption of the East Gate ASP, the multi-family residential, hospitality and commercial development has sprung to life with a number of developments taking place.

In terms of commercial, major tenants such as Coop Home Centre, Boston Pizza, Mary Brown’s have recently opened with serviced land and roads in place for significantly more retail development capable of accommodating larger format anchors as well as more in-line retail spaces.



Figure 2-5. Downtown Bonnyville Boundary Map (in relation to the Town Boundary)

(Source: Downtown ARP, 2009)

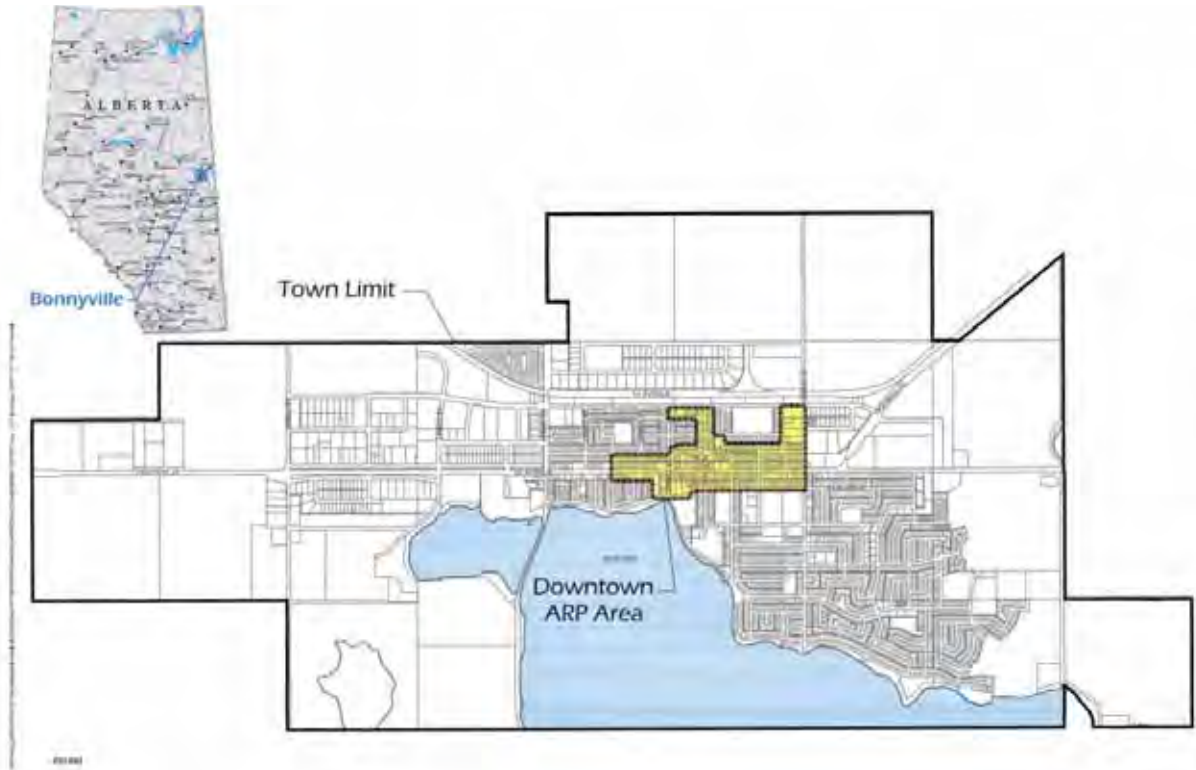


Figure 2-6. Downtown ARP and Sub-Area Boundaries

(Source: Downtown ARP, 2009)



## 3.0 Trade Area

### 3.1 Introduction

In order to create a framework for evaluating retail demand and subsequent gaps in the provision of shops and services, it is necessary to define and identify the Trade Areas from which Bonnyville's retail sales are most frequently and likely to be sourced. Generated Trade Areas recognize drive times, demographics, spending attributes and competition, which collectively portray the market to prospective tenants, developers and investors.

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

As a first step, a Retail Trade Area is delineated to identify the geographic region from which regular patronage could be expected, based on a series of boundary determinants. Major considerations in defining Retail Trade Areas were applied to determine the most realistic Trade Areas, as well as to help sensitize potential market share inputs of corresponding Trade Area retail spending.

Retail Trade Area determinants include:

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. 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.

For this particular study, Retail Trade Areas (**Figure 3-1**) are delineated utilizing a combination of drive times and competitive forces including communities of Cold Lake, St. Paul, and Elk Point.

### 3.2 Population Demographics and Projections

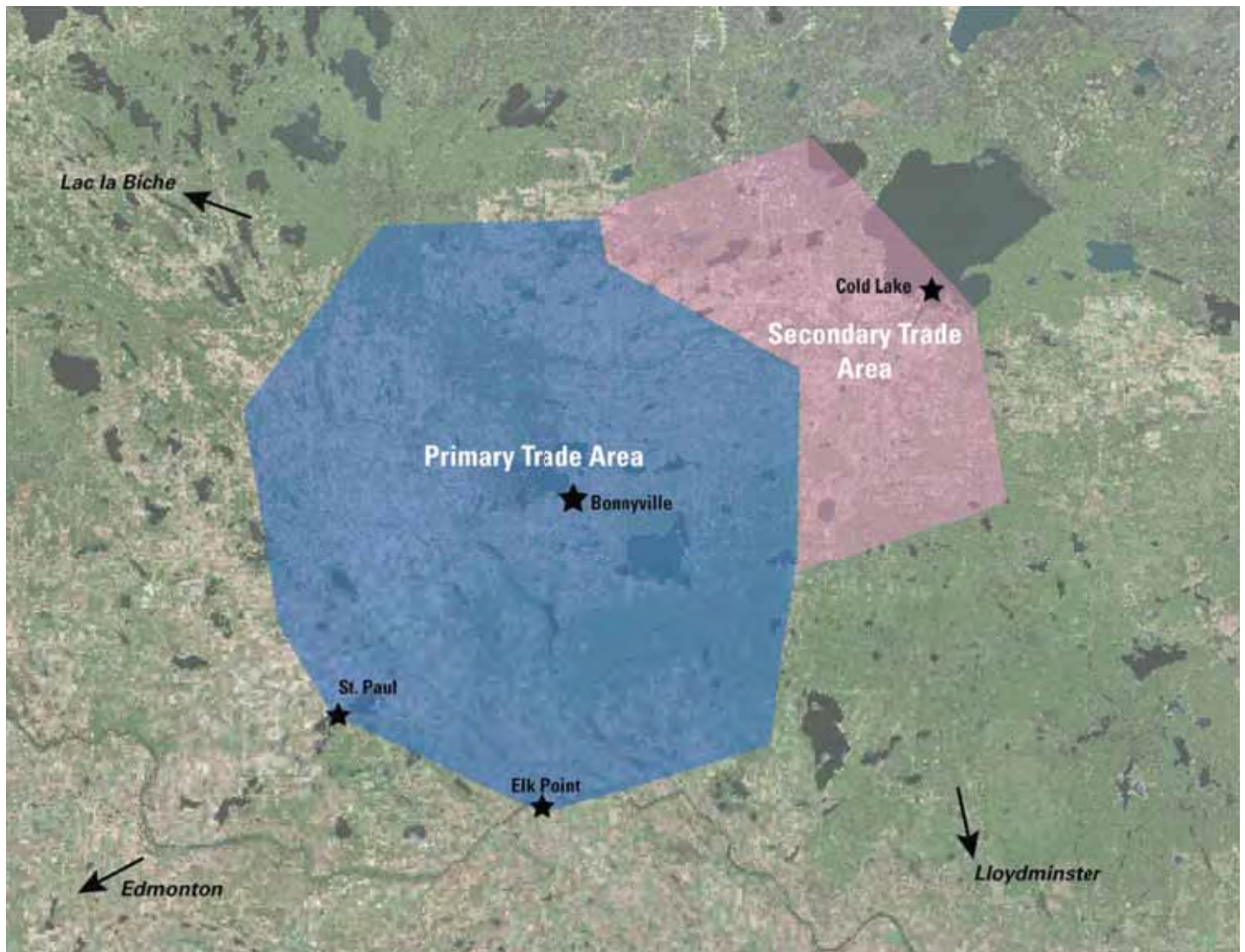
The most recent Statistics Canada Census release (2021) as well as Manifold Data Mining Inc (2022), a leading supplier of demographic and consumer expenditure information, were used to tabulate population estimates and growth forecasts for the identified Trade Areas. These forecasts represent a snapshot based on demographic models and do not account for future planning realities that may influence population growth.

Estimated for the year-end 2022, the population of the Primary Trade Area (PTA) is 27,239 and is projected to grow by 0.84% annually over the next five years (**Table 3-1**). The PTA is demographically similar to Alberta with a slightly lower percentage of people aged between 25-34 and a slightly higher percentage of people aged 65 and over (**Table 3-2** and **Figure 3-2**). The average household income of the PTA is \$140,344 which is lower than the Alberta average of \$153,772 (**Table 3-1**). The household income breakdown for the PTA is comparable to Alberta with a slightly lower percentage of earners under \$10,000 (**Table 3-3** and **Figure 3-4**). Of those over the age of 15 in the PTA, 50.31% have a post-secondary certificate, diploma or degree which is slightly lower than the Alberta benchmark (55.71%).

Estimated for the year-end 2022, the population of the Secondary Trade Area (STA) is 22,291 and projected to grow by 0.78% annually over the next three years (**Table 3-1**). Demographically, the STA population breakdown appears to be younger compared to the average of Alberta, with relatively high percentages of population between the ages of 0-44 (**Table 3-2** and **Figure 3-2**). The average household income of the STA is \$160,252, which is higher than both the Alberta (\$153,772) and the PTA (\$140,344) averages (**Table 3-1**). The household income breakdown for the STA shows a high percentage of earners in the categories between \$60,000 and \$99,999 when compared to Alberta and the PTA (**Table 3-3** and **Figure 3-4**). Of those over the age of 15 in the STA, 53.23% have a post-secondary certificate, diploma, or degree.

Figure 3-1. Bonnyville Primary and Secondary Trade Areas

(Source: FBM)



### 3.2.1 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.

The purpose of these Lifestyle Clusters is to provide the reader/audience with a sense of the profile and preferences of Bonnyville's predominant trade area resident consumer. This provides insights into the types of industries and businesses that are likely to be attracted to and are most compatible given the demographic composition.

The three dominant CanaCode Lifestyle Clusters in the total Bonnyville Trade Area are Clusters G (Up the Ladder), I (Urban Life in Small Town) and K (Rural Handymen), each representing 26.68%, 44.1% and 8.9% of the Trade Area population (**Table 3-3** and **Figure 3-3**).

A full listing of the CanaCode Lifestyle Clusters can be viewed at [www.polarisintelligence.com/canacode/](http://www.polarisintelligence.com/canacode/)

Table 3-1. Trade Area Summary Table

(Source: FBM & Manifold Data Mining Inc.)

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

Attribute	Benchmark: Alberta		Bonnyville PTA			Bonnyville STA			Bonnyville Total Trade Area		
	value	percent	value	percent	index	value	percent	index	value	percent	index
<b>Attribute Summary</b>											
<b>SUMMARY</b>											
Total population	4,491,760		27,239			22,291			49,530		
Total population age 15 and over	3,677,900		22,150			17,486			39,636		
Total number of private households	1,711,590		10,623			8,372			18,995		
Average number of persons in private households	2.57		2.52		98	2.53		98	2.53		98
<b>POPULATION AGE</b>											
Population age 0-14	813,862	18.12%	5,089	18.68%	103	4,805	21.56%	119	9,893	19.97%	110
Population age 15-24	535,544	11.92%	3,516	12.91%	108	2,681	12.03%	101	6,196	12.51%	105
Population age 25-34	642,876	14.31%	3,773	13.85%	97	3,820	17.14%	120	7,594	15.33%	107
Population age 35-44	687,116	15.30%	3,915	14.37%	94	3,735	16.76%	110	7,650	15.45%	101
Population age 45-54	563,967	12.56%	3,103	11.39%	91	2,366	10.61%	84	5,469	11.04%	88
Population age 55-64	557,331	12.41%	3,344	12.28%	99	2,607	11.70%	94	5,951	12.02%	97
Population age 65+	691,064	15.39%	4,499	16.52%	107	2,276	10.21%	66	6,776	13.68%	89
<b>EDUCATION</b>											
Total population aged 15 years and over by highest certificate, diploma, or degree	3,677,900		22,150			17,486			39,636		
No certificate, diploma, or degree	611,447	16.63%	4,941	22.31%	134	3,036	17.36%	104	7,978	20.13%	121
High school diploma or equivalent	1,017,690	27.67%	6,065	27.38%	99	5,141	29.40%	106	11,207	28.27%	102
Post-secondary certificate, diploma, or degree	2,048,760	55.71%	11,143	50.31%	90	9,309	53.23%	96	20,452	51.60%	93
Apprenticeship or trades certificate or diploma	352,854	9.58%	3,245	14.65%	153	2,307	13.19%	138	5,552	14.01%	146
College, CEGEP or other non-university certificate or diploma	703,492	19.13%	4,697	21.21%	111	4,146	23.71%	124	8,844	22.31%	117
University certificate or diploma below bachelor level	114,203	3.11%	835	3.77%	121	414	2.37%	76	1,249	3.15%	101
University certificate, diploma, or degree at bachelor level or above	878,212	23.88%	2,364	10.67%	48	2,442	13.96%	59	4,806	12.13%	51
Bachelor's degree	614,723	16.71%	2,040	9.21%	55	1,970	11.26%	67	4,010	10.12%	61
<b>INCOME</b>											
Average household income \$	\$153,772		\$140,344		91	\$160,252		104	\$149,119		97
Average income population age 15 and over (\$)	\$79,072		\$72,175		91	\$80,832		102	\$75,999		96
Population with income Under \$10,000 (including loss)	290,044	7.89%	1,259	5.69%	72	1,089	6.23%	79	2,348	5.92%	75
Population with income \$10,000 to \$19,999	413,169	11.23%	2,273	10.26%	91	1,493	8.54%	76	3,766	9.50%	85
Population with income \$20,000 to \$29,999	418,658	11.38%	2,728	12.32%	108	1,772	10.13%	89	4,500	11.35%	100
Population with income \$30,000 to \$39,999	370,658	10.08%	2,397	10.82%	107	1,640	9.38%	93	4,037	10.19%	101
Population with income \$40,000 to \$49,999	337,968	9.19%	2,290	10.34%	113	1,480	8.46%	92	3,769	9.51%	103
Population with income \$50,000 to \$59,999	300,893	8.18%	1,898	8.57%	105	1,475	8.44%	103	3,373	8.51%	104
Population with income \$60,000 to \$69,999	256,117	6.96%	1,686	7.61%	109	1,467	8.39%	121	3,153	7.96%	114
Population with income \$70,000 to \$79,999	212,074	5.77%	1,238	5.59%	97	1,506	8.61%	149	2,744	6.92%	120
Population with income \$80,000 to \$89,999	173,484	4.72%	1,109	5.01%	106	1,134	6.49%	138	2,243	5.66%	120
Population with income \$90,000 to \$99,999	146,677	3.99%	971	4.38%	110	809	4.62%	116	1,780	4.49%	113
Population with income \$100,000 and over	583,373	15.86%	3,395	15.33%	97	2,942	16.82%	106	6,377	15.99%	101
Population with income \$100,000 to \$149,999	238,709	6.49%	1,465	6.61%	102	1,161	6.64%	102	2,626	6.63%	102
Population with income \$150,000 and over	344,664	9.37%	1,930	8.71%	93	1,781	10.18%	109	3,751	9.36%	100
<b>PROJECTIONS</b>											
Annual population growth in the period: Next 5 years		0.98%		0.84%	86		0.78%	80		0.81%	83
Annual household growth in the period: Next 5 years		1.21%		1.35%	112		1.27%	105		1.31%	108
Annual population growth in the period: 5 to 10 years from current year		0.93%		0.79%	85		0.69%	74		0.74%	80
Annual household growth in the period: 5 to 10 years from current year		1.14%		1.30%	114		1.19%	104		1.25%	110
<b>POPULATION GROWTH</b>											
Current year total population	4,491,760		27,239			22,291			49,530		
5-Year Projections - Total population	4,716,090		28,436			23,180			51,616		
10-Year Projections - Total population	4,938,360		29,616			23,997			53,613		
<b>HOUSEHOLD GROWTH</b>											
Current year total number of households	1,711,590		10,623			8,372			18,995		
5-Year Projections - Total number of households	1,817,550		11,363			8,918			20,282		
10-Year Projections - Total number of households	1,923,470		12,128			9,467			21,595		
<b>HOUSEHOLD INCOME GROWTH</b>											
Current year average household income	\$153,772		\$140,344		91	\$160,252		104	\$149,119		97
5-Year Projections - Average household income	\$195,645		\$172,862		88	\$192,825		99	\$181,640		93
10-Year Projections - Average household income	\$250,471		\$221,876		89	\$240,816		96	\$230,179		92
<b>Employment</b>											
<b>CLASS OF WORKER</b>											
Total labour force 15 years and over by class of worker	2,576,080		15,199			13,209			28,407		
Class of worker - Not applicable	72,454	2.81%	313	2.06%	73	242	1.83%	65	555	1.95%	69
All classes of worker	2,503,630	97.19%	14,886	97.94%	101	12,967	98.17%	101	27,852	98.05%	101
Employees	2,195,210	85.22%	12,408	81.64%	96	12,111	91.69%	108	24,519	86.31%	101
Self-employed	308,413	11.97%	2,478	16.30%	136	856	6.48%	54	3,334	11.73%	98
<b>Labour Force</b>											
<b>LABOUR FORCE INDUSTRY</b>											
Total labour force population aged 15+ years - North American Industry Classification System (NAICS) 2017	2,576,080		15,199			13,209			28,407		
Industry - not applicable	72,454	2.81%	313	2.06%	73	242	1.83%	65	555	1.95%	69
All industries	2,503,630	97.19%	14,886	97.94%	101	12,967	98.17%	101	27,852	98.05%	101
11 Agriculture, forestry, fishing, and hunting	17,275	0.69%	681	4.48%	162	83	0.63%	23	763	2.69%	97
21 Mining, quarrying, and oil and gas extraction	156,756	6.09%	2,581	16.98%	279	1,724	13.05%	214	4,304	15.15%	249
22 Utilities	29,458	1.14%	217	1.43%	125	21	0.16%	14	238	0.84%	74
23 Construction	249,121	9.67%	1,718	11.30%	117	973	7.37%	76	2,691	9.47%	98
31-33 Manufacturing	141,450	5.49%	391	2.57%	47	297	2.25%	41	688	2.42%	44
41 Wholesale trade	93,997	3.65%	270	1.78%	49	185	1.40%	38	455	1.60%	44
44-45 Retail trade	276,215	10.72%	1,406	9.25%	86	1,649	12.48%	116	3,055	10.75%	100
48-49 Transportation and warehousing	123,020	4.78%	665	4.37%	91	375	2.84%	59	1,040	3.66%	77
51 Information and cultural industries	36,059	1.40%	211	1.39%	99	129	0.98%	70	341	1.20%	86
52 Finance and insurance	87,698	3.40%	421	2.77%	81	212	1.61%	47	633	2.23%	66
53 Real estate and rental and leasing	53,484	2.08%	301	1.98%	95	104	0.79%	38	405	1.43%	69
54 Professional, scientific, and technical services	199,179	7.73%	718	4.72%	61	450	3.41%	44	1,168	4.11%	53
55 Management of companies and enterprises	7,596	0.30%	41	0.27%	90	27	0.21%	70	68	0.24%	80
56 Administrative and support, waste management and remediation services	93,233	3.62%	452	2.97%	82	525	3.97%	110	977	3.44%	95
61 Educational services	169,337	6.57%	963	6.34%	96	535	4.05%	62	1,499	5.28%	80
62 Health care and social assistance	277,100	10.76%	1,589	10.45%	97	915	6.93%	64	2,504	8.81%	82
71 Arts, entertainment, and recreation	48,056	1.87%	145	0.96%	51	303	2.29%	122	446	1.58%	84
72 Accommodation and food services	139,792	5.43%	800	5.20%	97	1,042	7.89%	145	1,842	6.48%	119
81 Other services (except public administration)	111,425	4.33%	523	3.44%	79	396	2.99%	69	919	3.23%	75
91 Public administration	139,380	5.41%	794	5.22%	96	3,022	22.88%	423	3,816	13.43%	248
<b>Occupation</b>											
<b>OCCUPATION</b>											
Total labour force 15 years and over by occupation	2,576,080		15,199			13,209			28,407		
Occupation - not applicable	72,454	2.81%	313	2.06%	73	242	1.83%	65	555	1.95%	69
All occupations	2,503,630	97.19%	14,886	97.94%	101	12,967	98.17%	101	27,852	98.05%	101
0 Management occupations	302,934	11.76%	1,553	10.22%	87	1,333	10.09%	86	2,886	10.16%	86
1 Business, finance, and administration occupations	411,043	15.96%	2,305	15.17%	95	1,268	9.60%	60	3,573	12.58%	79
2 Natural and applied sciences and related occupations	213,690	8.30%	668	4.40%	53	1,054	7.98%	96	1,722	6.06%	73
3 Health occupations	176,559	6.87%	916	6.03%	88	688	5.21%	76	1,604	5.65%	82
4 Occupations in education, law and social, community and government services	273,288	10.62%	1,135	7.47%	70	2,298	17.40%	164	3,433	12.08%	114
5 Occupations in art, culture, recreation, and sport	51,968	2.02%	270	1.78%	88	139	1.05%	52	409	1.44%	71
6 Sales and service occupations	494,943	19.21%	2,763	18.18%	95	2,936	22.23%	116	5,699	20.06%	104
7 Trades, transport and equipment operators and related occupations	425,949	16.54%	3,736	24.58%	149	2,053	15.55%	94	5,789	20.38%	123
8 Natural resources, agriculture, and related production occupations	75,707	2.94%	1,001	6.59%	224	473	3.58%	122	1,474	5.19%	177
9 Occupations in manufacturing and utilities	77,007	2.99%	538	3.54%	118	723	5.48%	183	1,261	4.44%	148

Table 3-2. Trade Area Population Breakdown

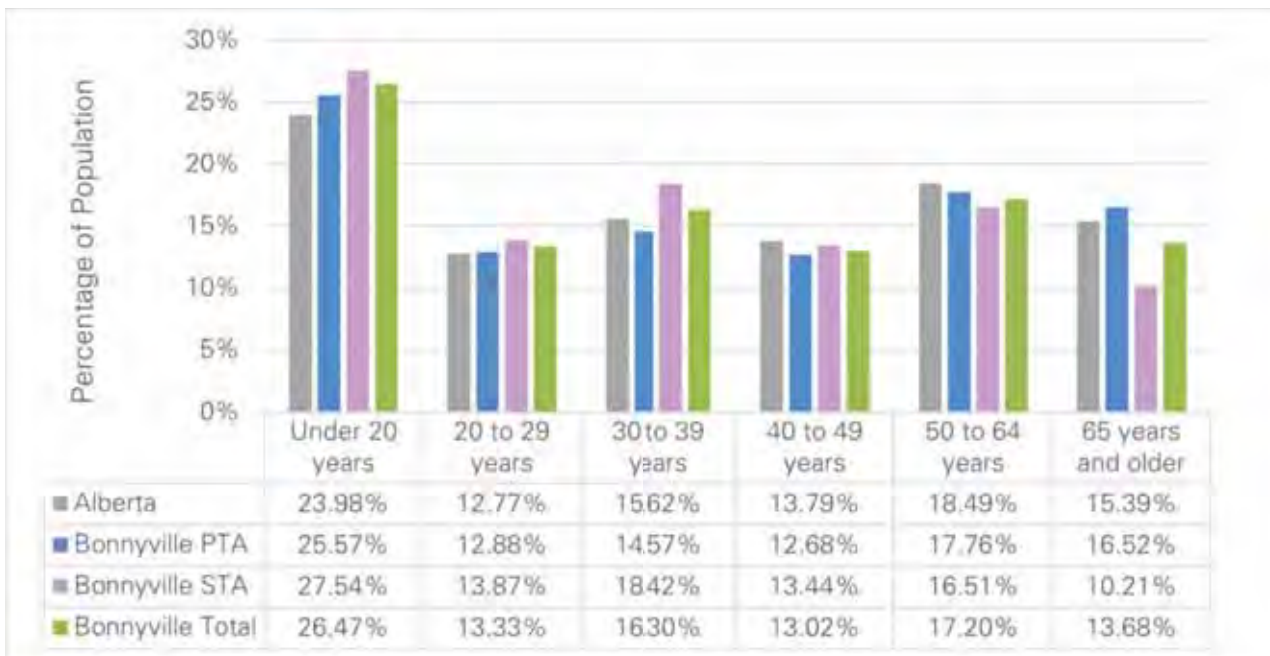
(Source: FBM & Manifold Data Mining Inc.)

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

Attribute	Benchmark - Alberta		Bonnyville PTA			Bonnyville STA			Bonnyville Total Trade Area		
	value	percent	value	percent	index	value	percent	index	value	percent	index
POPULATION AGE GROUP											
Total population by age groups	4,491,760		27,239			22,291			49,530		
0-14	813,862	18.12%	5,089	18.68%	103	4,805	21.56%	119	9,893	19.97%	110
0-4	262,651	5.85%	1,535	5.64%	96	1,579	7.08%	121	3,115	6.29%	108
5-9	273,812	6.10%	1,709	6.27%	103	1,639	7.35%	120	3,347	6.76%	111
10-14	277,399	6.18%	1,845	6.77%	110	1,587	7.12%	115	3,432	6.93%	112
15-64	2,986,830	66.50%	17,651	64.80%	97	15,210	68.23%	103	32,860	66.35%	100
15-19	262,649	5.85%	1,878	6.89%	118	1,336	5.99%	102	3,213	6.49%	111
20-24	272,895	6.08%	1,638	6.01%	99	1,345	6.03%	99	2,983	6.02%	99
25-29	300,283	6.69%	1,872	6.87%	103	1,748	7.84%	117	3,620	7.31%	109
30-34	342,593	7.63%	1,901	6.98%	91	2,073	9.30%	122	3,974	8.02%	105
35-39	358,699	7.99%	2,068	7.59%	95	2,034	9.12%	114	4,102	8.28%	104
40-44	328,417	7.31%	1,846	6.78%	93	1,702	7.63%	104	3,548	7.16%	98
45-49	291,023	6.48%	1,608	5.90%	91	1,294	5.81%	90	2,902	5.86%	90
50-54	272,944	6.08%	1,495	5.49%	90	1,071	4.81%	79	2,567	5.18%	85
55-59	277,912	6.19%	1,687	6.19%	100	1,353	6.07%	98	3,040	6.14%	99
60-64	279,419	6.22%	1,657	6.08%	98	1,254	5.63%	91	2,911	5.88%	95
65 and over	691,064	15.39%	4,499	16.52%	107	2,276	10.21%	66	6,776	13.68%	89
65-69	236,564	5.27%	1,462	5.37%	102	798	3.58%	68	2,260	4.56%	87
70-74	175,730	3.91%	1,059	3.89%	99	539	2.42%	62	1,598	3.23%	83
75-79	121,267	2.70%	804	2.95%	109	406	1.82%	67	1,210	2.44%	90
80-84	77,081	1.72%	521	1.91%	111	226	1.01%	59	747	1.51%	88
85 and over	80,421	1.79%	654	2.40%	134	307	1.38%	77	962	1.94%	108
85-89	50,730	1.13%	354	1.30%	115	204	0.91%	81	558	1.13%	100
90-94	22,596	0.50%	188	0.69%	138	62	0.28%	56	250	0.50%	100
95-99	6,188	0.14%	106	0.39%	279	40	0.18%	129	146	0.29%	207
100 and over	907	0.02%	6	0.02%	100	2	0.01%	50	8	0.02%	100
Average age of total population	39.40		39.40		100	35.80		91	37.80		96
Median age of total population	38.50		38.80		101	34.90		91	37.00		96

Figure 3-2. Population Breakdown

(Source: Manifold Data Mining Inc.)



**Table 3-3. Trade Area Canacode Lifestyle Cluster**

(Source: FBM & Manifold Data Mining Inc.)

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

Attribute	Benchmark - Alberta		Bonnyville PTA			Bonnyville STA			Bonnyville Total Trade Area		
	value	percent	value	percent	index	value	percent	index	value	percent	index
A: AFFLUENTS	114,456	6.65%	0	0.00%	0	151	1.81%	27	151	0.80%	12
B: ELITE PROFESSIONALS	197,500	11.48%	0	0.00%	0	1,172	14.00%	122	1,172	6.17%	54
C: ETHNIC CRUISERS	64,776	3.77%	0	0.00%	0	53	0.63%	17	53	0.28%	7
D: NEST BUILDERS	161,109	9.36%	0	0.00%	0	619	7.39%	79	619	3.26%	35
E: BUY ME A NEW HOME	265,399	15.43%	0	0.00%	0	964	11.51%	75	964	5.07%	33
F: EMPTY NESTERS	49,571	2.88%	0	0.00%	0	2	0.02%	1	2	0.01%	0
G: UP THE LADDER	269,609	15.67%	2,402	22.62%	144	2,666	31.84%	203	5,068	26.68%	170
H: HIGH TRADES	49,726	2.89%	0	0.00%	0	152	1.81%	63	152	0.80%	28
I: URBAN LIFE IN SMALL TOWN	160,103	9.31%	6,721	63.27%	680	1,650	19.71%	212	8,371	44.07%	473
J: JOYFUL COUNTRY	78,627	4.57%	121	1.14%	25	0	0.00%	0	121	0.64%	14
K: RURAL HANDYMEN	28,970	1.68%	1,284	12.09%	720	404	4.83%	288	1,688	8.89%	529
L: COMFORTABLE APARTMENT DWELLERS	157,344	9.15%	0	0.00%	0	181	2.16%	24	181	0.95%	10
M: SINGLES	50,313	2.92%	0	0.00%	0	273	3.26%	112	273	1.44%	49
N: NEW CANADIANS	36,068	2.10%	0	0.00%	0	86	1.03%	49	86	0.45%	21
O: RENTERS	15,657	0.91%	0	0.00%	0	0	0.00%	0	0	0.00%	0
P: ONE PARENT FAMILIES	12,475	0.73%	94	0.89%	122	0	0.00%	0	94	0.50%	68
Q: THRIFTY	8,914	0.52%	0	0.00%	0	0	0.00%	0	0	0.00%	0

**Figure 3-3** illustrates demographic traits for typical Canadian households. While factors such as house values and activities can be different depending on economic and geographic contexts, these descriptions offer a general sense of consumers' spending habits and lifestyle in the Trade Area. For information specific to Bonnyville, see section 3.2 (Population Demographics and Projection).

**Cluster G: “Up the Ladder” Cluster**

This cluster represents 26.7% of the Total Trade Area Population compared to 14.5% of the Canadian Population. Population in this cluster usually include young families and new suburbanites seeking to pursue their career while preserving their time for their children. This cluster tends to seek opportunities for family activities, including camping, hiking, and snowboarding. Consumers in this group are also active social media users who have busy social lives and for whom friends' opinions are important. Their shopping preferences include typical retailers like Atmosphers, no frills as well as online shopping

**Cluster I: “Urban Life in Small Town” Cluster**

Accounting for 44.1% of the Trade Area population compared to the Canadian share of 7.2%, this group is the largest cluster in the Bonnyville Trade Area. Population in this cluster is usually aged between 55 and 59 working in service industries, but use their discretionary income on recreational activities such as ATV/snowmobiling, power boating, fishing/hunting, camping and curling. They have a tendency to shop at more value-oriented retailers such as Walmart, Coop and No Frills for their day-to-day needs, but do have a propensity for in-store impulse

purchases and therefore less spending online than younger generations, except where remote locations necessitate such purchases.

**Cluster K: “Rural Handymen” Cluster**

This cluster accounts for 8.9% of the Trade Area population compared to the Canadian share of 4.3%. Population in this cluster average between 55-64 years of age and usually work in blue collar industries, owning older homes and North American branded vehicles, particularly SUVs and pickup trucks. They have an active social life that includes outdoor motorized recreation with friends and family and like their other trade area counterparts shop at more value-oriented stores like Giant Tiger, Walmart and Tim Hortons. This age cohort does however represent a balance of the “Up the Ladder” and “Urban Life in a Small Town” segment whereby they shop frequently at both online and physical stores and their adventurous/outdoorsy lifestyle lends itself to many discretionary acquisitions for home and personal recreation.

Table 3-4. Household Income Breakdown

(Source: FBM & Manifold Data Mining Inc.)

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

Attribute	Benchmark - Alberta		Bonnyville PTA			Bonnyville STA			Bonnyville Total Trade Area		
	value	percent	value	percent	index	value	percent	index	value	percent	index
<b>HOUSEHOLD INCOME</b>											
Total number of households	1,711,590		10,623			8,372			18,995		
Average household income \$	\$153,772		\$140,344		91	\$160,252		104	\$149,119		97
Median household income \$	\$112,790		\$113,793		101	\$135,425		120	\$123,327		109
Household with income under \$5,000	13,702	0.80%	81	0.76%	95	30	0.36%	45	111	0.58%	73
Household with income \$5,000 to \$9,999	15,819	0.92%	63	0.59%	64	39	0.47%	51	102	0.54%	59
Household with income \$10,000 to \$14,999	18,365	1.07%	87	0.82%	77	57	0.68%	64	144	0.76%	71
Household with income \$15,000 to \$19,999	28,174	1.65%	154	1.45%	88	94	1.12%	68	248	1.31%	79
Household with income \$20,000 to \$24,999	43,424	2.54%	361	3.40%	134	123	1.47%	58	484	2.55%	100
Household with income \$25,000 to \$29,999	43,685	2.55%	356	3.35%	131	153	1.83%	72	508	2.68%	105
Household with income \$30,000 to \$34,999	46,038	2.69%	314	2.95%	110	170	2.03%	75	484	2.55%	95
Household with income \$35,000 to \$39,999	49,721	2.91%	365	3.44%	118	175	2.09%	72	541	2.85%	98
Household with income \$40,000 to \$44,999	51,051	2.98%	387	3.64%	122	190	2.26%	76	577	3.04%	102
Household with income \$45,000 to \$49,999	52,941	3.09%	342	3.22%	104	201	2.40%	78	543	2.86%	93
Household with income \$50,000 to \$59,999	83,182	4.86%	475	4.47%	92	274	3.27%	67	749	3.94%	81
Household with income \$60,000 to \$69,999	99,334	5.80%	622	5.86%	101	377	4.50%	78	999	5.26%	91
Household with income \$70,000 to \$79,999	103,443	6.04%	636	5.99%	99	504	6.02%	100	1,140	6.00%	99
Household with income \$80,000 to \$89,999	103,184	6.03%	580	5.46%	91	547	6.53%	108	1,127	5.93%	98
Household with income \$90,000 to \$99,999	101,887	5.95%	617	5.81%	98	566	6.76%	114	1,183	6.23%	105
Household with income \$100,000 and over	857,641	50.11%	5,182	48.79%	97	4,873	58.20%	116	10,055	52.94%	106
Household with income \$100,000 to \$124,999	165,831	9.69%	962	9.06%	93	819	9.79%	101	1,781	9.38%	97
Household with income \$125,000 to \$149,999	171,141	10.00%	1,053	9.91%	99	991	11.84%	118	2,044	10.76%	108
Household with income \$150,000 to \$199,999	195,959	11.45%	1,263	11.89%	104	1,085	12.95%	113	2,348	12.36%	108
Household with income \$200,000 and over	324,709	18.97%	1,905	17.93%	95	1,978	23.63%	125	3,883	20.44%	108

Figure 3-3. Household Income Breakdown

(Source: Manifold Data Mining Inc.)



### 3.3 Summary of Employment & Labour

**Table 3-4** provides a summary of the estimated 2022 Labour Force profile for Bonnyville's Primary and Secondary Trade Areas. Within both the PTA and STA, vehicles are the primary mode of transportation amongst commuters (**Figure 3-5**). Public transit use is very low (0.39% and 2.58% respectively) compared to the Alberta average (8%), reflecting a lack of accessible public transit system in the region.

Of those aged 15 and older who commute to work, 41.48% of those in the PTA and 46.56% of those in the STA commute less than 15 minutes (**Table 3-4**). Compared to the Alberta average (25.28%), the PTA value is high and the STA value is very high. Notably, Both the PTA and the STA also had higher percentages of commuters who commute 60 minutes or longer (5.77% in the PTA and 6.88% in the STA, whereas the provincial average is 4.53%).

According to **Table 3-5**, the most prominent industry within the PTA is Mining, Quarrying and Oil and Gas Extraction, accounting for 16.98% of the labour force population (or 2,581 employees) within the PTA. While this sector is still prominent in the STA, the largest sector within the STA is Public Administration (representing 22.88% or 3,022 employees).

By occupation, a large portion of the PTA's labour population is employed in the following two categories:

- Trades, Transport and Equipment Operators and Related Occupations (24.58% & 3,736 employees); and
- Sales and Service Occupations (18.18% & 2,763 employees).

In addition, a very high percentage (6.59%) is employed in Natural Resources, Agriculture and Related Production Occupations compared to the Alberta benchmark (2.94%).

While trades and sales occupations are also dominant in the STA (accounting for 15.55% & 2,053 employees; 22.23% & 2,936 employees), the STA also had a high percentage of the population employed in Education, Law and Social, Community and Government Services sector (17.40% & 2,298 employees). In addition, compared to the Alberta benchmark, a very high proportion of the labour population is employed in Occupations in Manufacturing and Utilities (5.48% in the STA; 2.99% in Alberta).

**Table 3-5. Labour Force Information**

(Source: FBM & Manifold Data Mining Inc.)

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

Attribute	Benchmark: Alberta		Bonnyville PTA			Bonnyville STA			Bonnyville Total Trade Area		
	value	percent	value	percent	index	value	percent	index	value	percent	index
<b>LABOUR FORCE ACTIVITY - TOTAL</b>											
Total population 15+ years	3,677,900		22,150			17,486			39,636		
In the labour force	2,576,080	70.04%	15,199	68.62%	98	13,209	75.54%	108	28,407	71.67%	102
Employed	2,292,080	62.32%	13,089	59.09%	95	11,840	67.71%	109	24,929	62.89%	101
Unemployed	284,002	7.72%	2,110	9.52%	123	1,369	7.83%	101	3,479	8.78%	114
Not in the labour force	1,101,820	29.96%	6,951	31.38%	105	4,277	24.46%	82	11,229	28.33%	95
Participation rate (%)		70.04%		68.62%	98		75.54%	108		71.67%	102
Employment rate (%)		62.32%		59.09%	95		67.71%	109		62.89%	101
Unemployment rate (%)		11.02%		13.88%	126		10.37%	94		12.25%	111
<b>PLACE OF WORK</b>											
Total employed labour force 15 years and over by place of work status	2,292,080		13,089			11,840			24,929		
Outside Canada	8,439	0.33%	7	0.05%	15	69	0.52%	158	77	0.27%	82
No fixed workplace address	316,507	12.29%	2,520	16.58%	135	1,654	12.52%	102	4,175	14.70%	120
Usual place of work	1,668,200	64.76%	9,035	59.45%	92	9,147	69.25%	107	18,182	64.00%	99
<b>COMMUTING DURATION</b>											
Total employed population aged 15 years and over who commute to work	2,035,330		11,773			11,408			23,181		
Less than 15 minutes	651,179	25.28%	6,305	41.48%	164	6,150	46.56%	184	12,456	43.85%	173
15 to 29 minutes	708,452	27.50%	2,372	15.61%	57	2,562	19.40%	71	4,934	17.37%	63
30 to 44 minutes	404,380	15.70%	1,414	9.30%	59	1,145	8.67%	55	2,558	9.01%	57
45 to 59 minutes	154,657	6.00%	806	5.30%	88	641	4.85%	81	1,447	5.09%	85
60 minutes and over	116,661	4.53%	877	5.77%	127	909	6.88%	152	1,786	6.29%	139
<b>MODE OF TRANSPORTATION</b>											
Total employed labour force 15 years and over who commute to work by mode of transportation	2,035,330		11,773			11,408			23,181		
Car, truck, van, as driver	1,569,960	60.94%	9,751	64.16%	105	9,064	68.62%	113	18,815	66.23%	109
Car, truck, van, as passenger	107,196	4.16%	719	4.73%	114	967	7.32%	176	1,687	5.94%	143
Public transit	206,077	8.00%	60	0.39%	5	341	2.58%	32	401	1.41%	18
Walked	92,606	3.60%	1,103	7.26%	202	851	6.44%	179	1,955	6.88%	191
Bicycle	25,377	0.99%	71	0.47%	47	71	0.54%	55	143	0.50%	51
Other method	34,111	1.32%	68	0.45%	34	113	0.85%	64	181	0.64%	48

Figure 3-4. Mode of Transportation to Work

(Source: Manifold Data Mining Inc.)

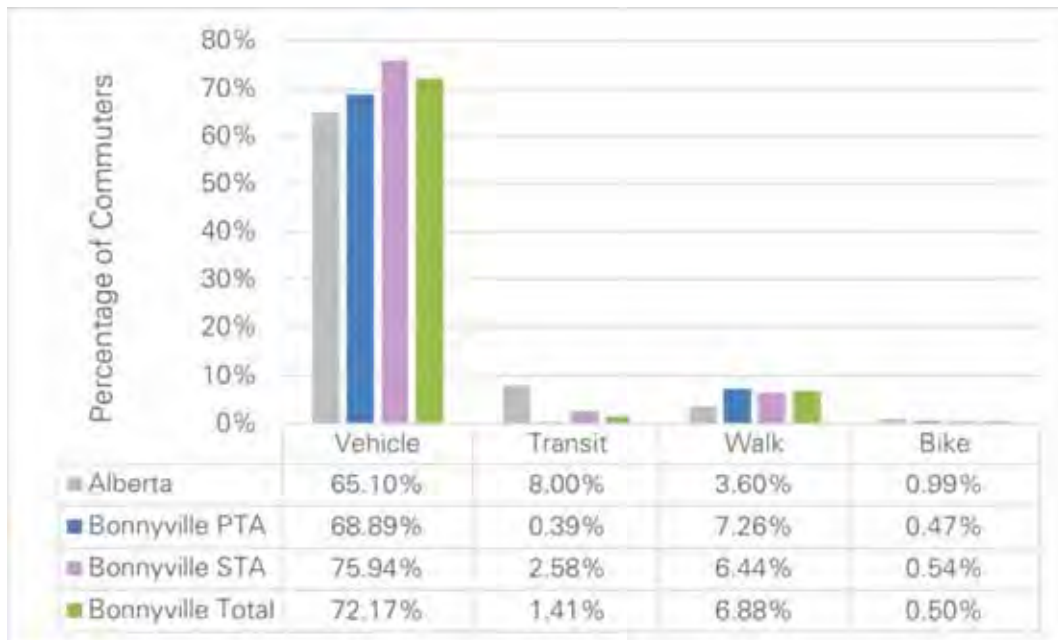


Table 3-6. Labour Force Industry and Occupation

(Source: FBM & Manifold Data Mining Inc.)

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

Attribute	Benchmark: Alberta		Bonnyville PTA			Bonnyville STA			Bonnyville Total Trade Area		
	value	percent	value	percent	index	value	percent	index	value	percent	index
<b>LABOUR FORCE INDUSTRY</b>											
Total labour force population aged 15+ years -	2,576,080		15,199			13,209			28,407		
North American Industry Classification System (NAICS) 2017											
Industry - not applicable	72,454	2.81%	313	2.06%	73	242	1.83%	65	555	1.95%	69
All industries	2,503,630	97.19%	14,886	97.94%	101	12,967	98.17%	101	27,852	98.05%	101
11 Agriculture, forestry, fishing, and hunting	71,275	2.77%	681	4.48%	162	83	0.63%	23	763	2.69%	97
21 Mining, quarrying, and oil and gas extraction	156,756	6.09%	2,581	16.98%	279	1,724	13.05%	214	4,304	15.15%	249
22 Utilities	29,458	1.14%	217	1.43%	125	21	0.16%	14	238	0.84%	74
23 Construction	249,121	9.67%	1,718	11.30%	117	973	7.37%	76	2,691	9.47%	98
31-33 Manufacturing	141,450	5.49%	391	2.57%	47	297	2.25%	41	688	2.42%	44
41 Wholesale trade	93,997	3.65%	270	1.78%	49	185	1.40%	38	455	1.60%	44
44-45 Retail trade	276,215	10.72%	1,406	9.25%	86	1,649	12.48%	116	3,055	10.75%	100
48-49 Transportation and warehousing	123,020	4.78%	665	4.37%	91	375	2.84%	59	1,040	3.66%	77
51 Information and cultural industries	36,059	1.40%	211	1.39%	99	129	0.98%	70	341	1.20%	86
52 Finance and insurance	87,698	3.40%	421	2.77%	81	212	1.61%	47	633	2.23%	66
53 Real estate and rental and leasing	53,484	2.08%	301	1.98%	95	104	0.79%	38	405	1.43%	69
54 Professional, scientific, and technical services	199,179	7.73%	718	4.72%	61	450	3.41%	44	1,168	4.11%	53
55 Management of companies and enterprises	7,596	0.30%	41	0.27%	90	27	0.21%	70	68	0.24%	80
56 Administrative and support, waste management and remediation services	93,233	3.62%	452	2.97%	82	525	3.97%	110	977	3.44%	95
61 Educational services	169,337	6.57%	963	6.34%	96	535	4.05%	62	1,499	5.28%	80
62 Health care and social assistance	277,100	10.76%	1,589	10.45%	97	915	6.93%	64	2,504	8.81%	82
71 Arts, entertainment, and recreation	48,056	1.87%	145	0.96%	51	303	2.29%	122	448	1.58%	84
72 Accommodation and food services	139,792	5.43%	800	5.26%	97	1,042	7.89%	145	1,842	6.48%	119
81 Other services (except public administration)	111,423	4.33%	523	3.44%	79	396	2.99%	69	919	3.23%	75
91 Public administration	139,380	5.41%	794	5.22%	96	3,022	22.88%	423	3,816	13.43%	248
<b>OCCUPATION</b>											
Total labour force 15 years and over by occupation	2,576,080		15,199			13,209			28,407		
Occupation - not applicable	72,454	2.81%	313	2.06%	73	242	1.83%	65	555	1.95%	69
All occupations	2,503,630	97.19%	14,886	97.94%	101	12,967	98.17%	101	27,852	98.05%	101
0 Management occupations	302,934	11.76%	1,553	10.22%	87	1,333	10.09%	86	2,886	10.16%	86
1 Business, finance, and administration occupations	411,043	15.96%	2,305	15.17%	95	1,268	9.60%	60	3,573	12.58%	79
2 Natural and applied sciences and related occupations	213,690	8.30%	668	4.40%	53	1,054	7.98%	96	1,722	6.06%	73
3 Health occupations	176,859	6.87%	916	6.03%	88	688	5.21%	76	1,604	5.65%	82
4 Occupations in education, law and social, community and government services	273,528	10.62%	1,135	7.47%	70	2,298	17.40%	164	3,433	12.08%	114
5 Occupations in art, culture, recreation, and sport	51,968	2.02%	270	1.78%	88	139	1.05%	52	409	1.44%	71
6 Sales and service occupations	494,943	19.21%	2,763	18.18%	95	2,936	22.23%	116	5,699	20.06%	104
7 Trades, transport and equipment operators and related occupations	425,949	16.54%	3,736	24.58%	149	2,053	15.55%	94	5,789	20.38%	123
8 Natural resources, agriculture, and related production occupations	75,707	2.94%	1,001	6.59%	224	473	3.58%	122	1,474	5.19%	177
9 Occupations in manufacturing and utilities	77,007	2.99%	538	3.54%	118	723	5.48%	183	1,261	4.44%	148

### 3.4 Retail Spending Profile

Detailed information of retail spending within each Trade Area was collected from Manifold Data Mining Inc., a leading supplier of demographic and consumer expenditure information, using 2021 year end data. The data was further consolidated into 22 specific spending categories in order to build a spending profile for the Trade Areas.

These spending categories, as shown in **Table 3-6** include:

1. Grocery & Specialty Foods
2. Pharmacy
3. Alcohol & Tobacco
4. Personal Services
5. *Health Care & Medical Services\**
6. Fashion & Accessories
7. Jewelry
8. Beauty & Personal Care
9. Home Furniture & Decor
10. Appliances & Electronics
11. Home Improvement and Gardening
12. Books & Media
13. Sporting Goods
14. Toys & Hobbies
15. Specialty Retail
16. Quick Service F&B
17. Restaurants & Pubs
18. Arts & Entertainment
19. Fitness & Leisure
20. Auto Parts and Accessories
21. Auto / RV / Motorsports Dealership
22. *Auto Fuel\**

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 Inc.

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. **Table 3-6**, **Table 3-7**, and **Table 3-8** illustrate a spending profile for Bonnyville's Primary and Secondary Trade Areas. Additional miscellaneous inflow is also presented in **Table 3-9**.

\*While categories such as "Health Care & Medical Services" and "Auto Fuel" have an associated household expenditure, they are only included in the spending profile and not quantified in the overall

demand. Health Care & Medical Services do not have a typical productivity associated with them for forecasting space since a large component of the business model is not a traditional fee-for-service or fee-for-product model and involves direct insurance payment. Auto Fuel is also highly volatile in terms of pricing, which is often a component of quantifying demand and productivity along with an understanding of the number of pumps, vehicles and litres sold as well as the fact that taxes vary from region to region.

#### 3.4.1 Primary Trade Area (PTA)

Bonnyville's PTA represents 52% of the overall retail spending (See **Figure 3-6** for the spending distribution). Total aggregate retail spending for 2023 was \$432 million excluding health care and auto. Grocery, Convenience and Specialty Foods represent the highest household spending category at \$12,352 and Household spending on Auto/RV/Motorsports was the second highest spending category (\$8,393).

Amongst the four major merchandise categories shown in **Figure 3-7**, Grocery & Convenience account for 36% of the total non-auto spending potential, while Comparison Merchandise accounts for 30%.

The PTA spending is expected to increase to \$485 million by 2028 and \$545 million by 2033, representing a 12% total increase in spending over each of the 5-year periods 2023 to 2028 and 2028 to 2033.

#### 3.4.2 Secondary Trade Area (STA)

Representing 43% of the overall retail spending, Bonnyville's STA is another crucial Trade Area to consider (**Figure 3-6**). Total aggregate retail spending for 2023 was \$346 million, excluding health care and auto.

Like PTA, household spending category amongst STA residents was highest among the categories of Grocery, Convenience and Specialty Foods (\$11,365) and Auto/RV/Motorsports Dealership (\$9,601). As of 2023, spending in the broad merchandise categories of Grocery & Convenues and Comparison Merchandise are comparable at \$149 and \$144 million respectively.

Total STA spending is expected to increase to \$387 million by 2028 and \$432 million by 2033 representing a 12% total increase in spending over each of the 5-year periods 2023 to 2028 and 2028 to 2033.

Figure 3-5. Trade Area 2023 Distribution

(Source: Manifold Data Mining Inc. & FBM)

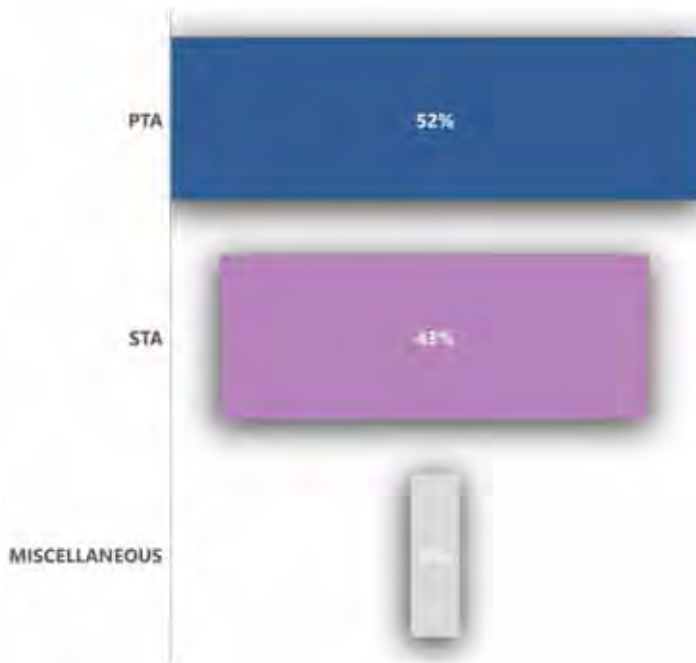
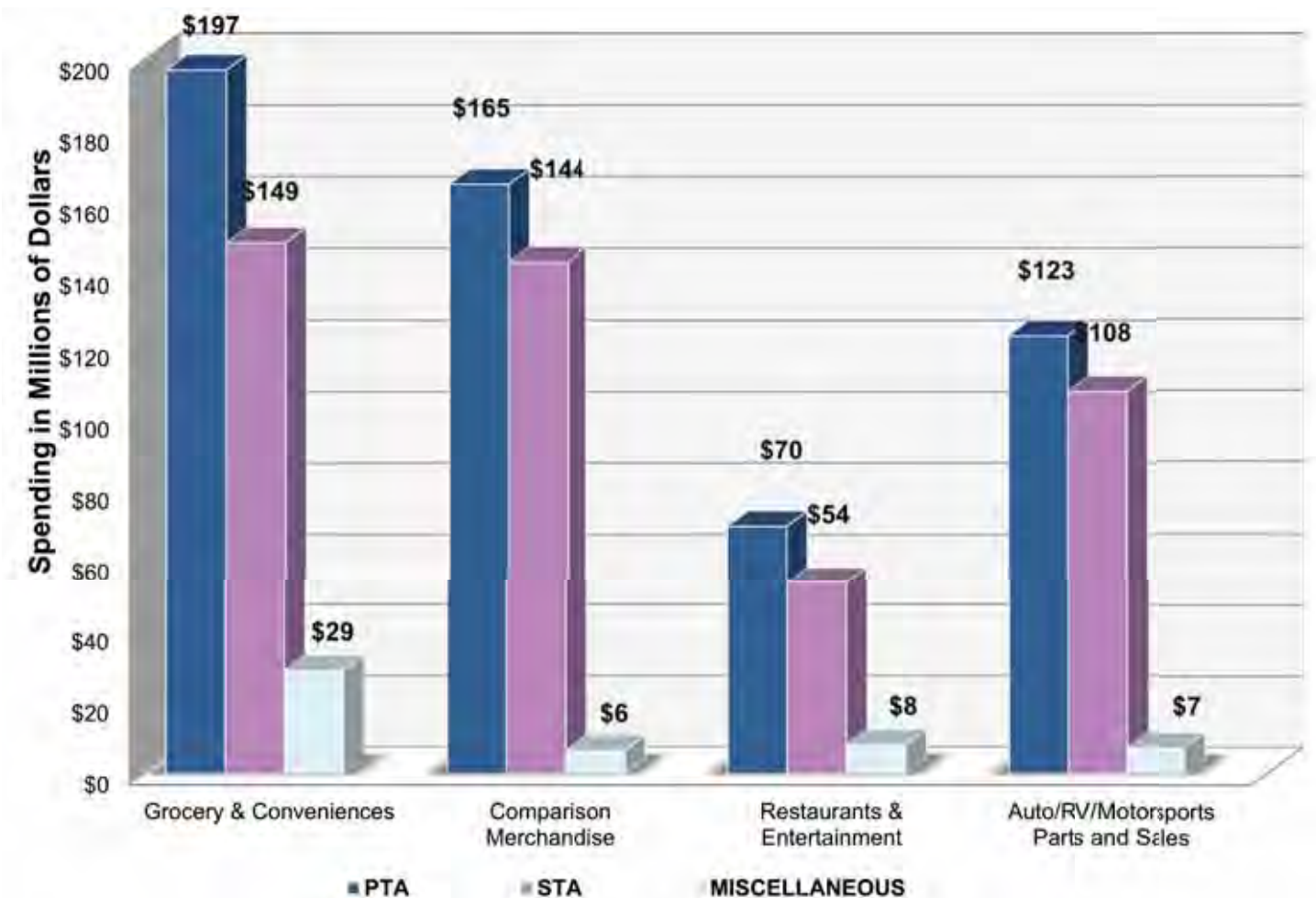


Figure 3-6. Trade Area Spending 2023 by Broad Merchandise Category

(Source: Manifold Data Mining Inc. & FBM)



**Table 3-7. Trade Area Retail Spending 2023 (by Detailed Merchandise Category)**

(Source: FBM & Manifold Data Mining Inc.)

Note: "Auto Parts & Accessories" includes "Maintenance and Repair" and "Online Sales Operation of Recreational Vehicles" as spending categories, which often include services that are not factored into the full inventory of this type of study.

Retail Spending by Merchandise Category	2023		2023		2023		
	BONNYVILLE PRIMARY TRADE AREA Per Household Retail Spending	BONNYVILLE PRIMARY TRADE AREA Aggregate Retail Spending	BONNYVILLE SECONDARY TRADE AREA Per Household Retail Spending	BONNYVILLE SECONDARY TRADE AREA Aggregate Retail Spending	TOTAL Trade Areas Average Household Retail Spending	TOTAL TRADE AREA Retail Spending	
Convenience & Day-to-Day Goods/Services	Grocery & Convenience	\$12,352	\$131,217,006	\$11,365	\$95,151,472	\$11,917	\$226,368,478
	Pharmacy	\$1,016	\$10,789,830	\$961	\$8,046,290	\$992	\$18,836,120
	Alcohol & Tobacco	\$1,526	\$16,210,136	\$1,533	\$12,837,349	\$1,529	\$29,047,485
	Personal Services	\$3,675	\$39,044,531	\$3,924	\$32,853,088	\$3,785	\$71,897,619
	Health Care & Medical Services	\$947	\$10,062,704	\$804	\$6,729,776		\$16,792,480
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	\$2,942	\$31,251,449	\$3,325	\$27,834,326	\$3,111	\$59,085,775
	Jewelry	\$223	\$2,366,023	\$254	\$2,129,453	\$237	\$4,495,476
	Beauty & Personal Care	\$1,753	\$18,616,914	\$1,853	\$15,509,214	\$1,797	\$34,126,127
	Home Furniture & Décor	\$1,117	\$11,871,078	\$1,257	\$10,525,080	\$1,179	\$22,396,158
	Appliances & Electronics	\$2,128	\$22,610,139	\$2,374	\$19,871,053	\$2,236	\$42,481,191
	Home Improvement & Gardening	\$3,773	\$40,084,552	\$3,940	\$32,986,171	\$3,847	\$73,070,723
	Books & Media	\$830	\$8,816,889	\$1,119	\$9,365,123	\$957	\$18,182,012
	Sporting Goods	\$806	\$8,561,125	\$972	\$8,136,299	\$879	\$16,697,423
	Toys & Hobbies	\$597	\$6,341,005	\$680	\$5,689,137	\$633	\$12,030,142
Specialty Retail	\$1,390	\$14,769,521	\$1,378	\$11,536,574	\$1,385	\$26,306,095	
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$2,740	\$29,108,348	\$2,593	\$21,710,547	\$2,675	\$50,818,895
	Restaurants & Pubs	\$3,089	\$32,817,018	\$2,996	\$25,085,618	\$3,048	\$57,902,636
	Arts & Entertainment	\$284	\$3,015,844	\$276	\$2,313,292	\$281	\$5,329,137
	Fitness & Leisure	\$452	\$4,805,208	\$547	\$4,579,869	\$494	\$9,385,077
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$3,200	\$33,998,030	\$3,251	\$27,221,257	\$3,223	\$61,219,286
	Auto/RV/Motorsports Dealership	\$8,393	\$89,155,333	\$9,601	\$80,378,902	\$8,925	\$169,534,236
	Auto Fuel	\$2,444	\$25,961,656	\$2,413	\$20,205,236	\$2,430	\$46,166,892
<b>TOTAL CATEGORIES</b>		<b>\$55,679</b>	<b>\$591,474,337</b>	<b>\$57,417</b>	<b>\$480,695,125</b>	<b>\$55,561</b>	<b>\$1,072,169,462</b>
<b>TOTAL (excluding Health Care &amp; Auto)</b>		<b>\$40,694</b>	<b>\$432,296,615</b>	<b>\$41,347</b>	<b>\$346,159,954</b>	<b>\$40,982</b>	<b>\$778,456,568</b>

**Table 3-8. Trade Area Retail Spending Potential 2028**

(Source: Manifold Data Mining Inc. & FBM)

Retail Spending by Merchandise Category	2028		2028		2028		
	BONNYVILLE PRIMARY TRADE AREA Per Household Retail Spending	BONNYVILLE PRIMARY TRADE AREA Aggregate Retail Spending	BONNYVILLE SECONDARY TRADE AREA Per Household Retail Spending	BONNYVILLE SECONDARY TRADE AREA Aggregate Retail Spending	TOTAL Trade Areas Average Household Retail Spending	TOTAL TRADE AREA Retail Spending	
Convenience & Day-to-Day Goods/Services	Grocery & Convenience	\$12,982	\$147,517,254	\$11,945	\$106,527,229	\$12,526	\$254,044,483
	Pharmacy	\$1,068	\$12,130,181	\$1,010	\$9,008,257	\$1,042	\$21,138,439
	Alcohol & Tobacco	\$1,604	\$18,223,817	\$1,612	\$14,372,108	\$1,607	\$32,595,926
	Personal Services	\$3,863	\$43,894,782	\$4,124	\$36,780,813	\$3,978	\$80,675,595
	Health Care & Medical Services	\$996	\$11,312,729	\$845	\$7,534,349	\$929	\$18,847,078
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	\$3,092	\$35,133,616	\$3,494	\$31,162,036	\$3,269	\$66,295,652
	Jewelry	\$234	\$2,659,938	\$267	\$2,384,038	\$249	\$5,043,977
	Beauty & Personal Care	\$1,842	\$20,929,574	\$1,947	\$17,363,405	\$1,888	\$38,292,979
	Home Furniture & Décor	\$1,174	\$13,345,746	\$1,321	\$11,783,397	\$1,239	\$25,129,143
	Appliances & Electronics	\$2,237	\$25,418,851	\$2,495	\$22,246,720	\$2,350	\$47,665,571
	Home Improvement & Gardening	\$3,966	\$45,063,999	\$4,141	\$36,929,805	\$4,043	\$81,993,804
	Books & Media	\$872	\$9,912,155	\$1,176	\$10,484,762	\$1,006	\$20,396,917
	Sporting Goods	\$847	\$9,624,618	\$1,021	\$9,109,027	\$924	\$18,733,646
	Toys & Hobbies	\$627	\$7,128,707	\$714	\$6,369,297	\$666	\$13,498,004
Specialty Retail	\$1,461	\$16,604,244	\$1,448	\$12,915,819	\$1,456	\$29,520,063	
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$2,880	\$32,724,291	\$2,726	\$24,306,133	\$2,812	\$57,030,425
	Restaurants & Pubs	\$3,247	\$36,893,666	\$3,149	\$28,084,709	\$3,204	\$64,978,374
	Arts & Entertainment	\$298	\$3,390,483	\$290	\$2,589,856	\$295	\$5,980,339
	Fitness & Leisure	\$475	\$5,402,128	\$575	\$5,127,412	\$519	\$10,529,540
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$3,364	\$38,221,387	\$3,417	\$30,475,672	\$3,387	\$68,697,059
	Auto/RV/Motorsports Dealership	\$8,821	\$100,230,529	\$10,091	\$89,988,536	\$9,379	\$190,219,065
	Auto Fuel	\$2,569	\$29,186,706	\$2,537	\$22,620,856	\$2,554	\$51,807,562
<b>TOTAL CATEGORIES</b>		<b>\$58,519</b>	<b>\$664,949,403</b>	<b>\$60,346</b>	<b>\$538,164,238</b>	<b>\$59,322</b>	<b>\$1,203,113,641</b>
<b>TOTAL (excluding Auto)</b>		<b>\$42,770</b>	<b>\$485,998,052</b>	<b>\$43,456</b>	<b>\$387,544,824</b>	<b>\$43,072</b>	<b>\$873,542,877</b>

**Table 3-9. Trade Area Retail Spending Potential 2033**

(Source: Manifold Data Mining Inc. & FBM)

Retail Spending by Merchandise Category	2033		2033		2033		
	BONNYVILLE PRIMARY TRADE AREA Per Household Retail Spending	BONNYVILLE PRIMARY TRADE AREA Aggregate Retail Spending	BONNYVILLE SECONDARY TRADE AREA Per Household Retail Spending	BONNYVILLE SECONDARY TRADE AREA Aggregate Retail Spending	TOTAL Trade Areas Average Household Retail Spending	TOTAL TRADE AREA Retail Spending	
Convenience & Day-to-Day Goods/Services	Grocery & Convenience	\$13,644	\$165,480,136	\$12,555	\$118,853,618	\$13,167	\$284,333,754
	Pharmacy	\$1,122	\$13,607,249	\$1,062	\$10,050,613	\$1,096	\$23,657,863
	Alcohol & Tobacco	\$1,686	\$20,442,895	\$1,694	\$16,035,122	\$1,689	\$36,478,017
	Personal Services	\$4,060	\$49,239,763	\$4,335	\$41,036,763	\$4,180	\$90,276,526
	Health Care & Medical Services	\$1,046	\$12,690,257	\$888	\$8,406,157	\$977	\$21,096,415
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	\$3,250	\$39,411,767	\$3,673	\$34,767,831	\$3,435	\$74,179,598
	Jewelry	\$246	\$2,983,834	\$281	\$2,659,898	\$261	\$5,643,732
	Beauty & Personal Care	\$1,936	\$23,478,126	\$2,046	\$19,372,545	\$1,984	\$42,850,671
	Home Furniture & Décor	\$1,234	\$14,970,831	\$1,389	\$13,146,868	\$1,302	\$28,117,699
	Appliances & Electronics	\$2,351	\$28,514,054	\$2,622	\$24,820,914	\$2,470	\$53,334,968
	Home Improvement & Gardening	\$4,168	\$50,551,352	\$4,352	\$41,202,996	\$4,249	\$91,754,348
	Books & Media	\$917	\$11,119,138	\$1,236	\$11,697,966	\$1,057	\$22,817,105
	Sporting Goods	\$890	\$10,796,589	\$1,074	\$10,163,044	\$971	\$20,959,632
	Toys & Hobbies	\$659	\$7,996,756	\$751	\$7,106,296	\$699	\$15,103,052
Specialty Retail	\$1,536	\$18,626,110	\$1,522	\$14,410,324	\$1,530	\$33,036,433	
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$3,027	\$36,709,063	\$2,865	\$27,118,624	\$2,956	\$63,827,687
	Restaurants & Pubs	\$3,412	\$41,386,134	\$3,310	\$31,334,423	\$3,367	\$72,720,557
	Arts & Entertainment	\$314	\$3,803,336	\$305	\$2,889,531	\$310	\$6,692,867
	Fitness & Leisure	\$500	\$6,059,934	\$604	\$5,720,710	\$546	\$11,780,645
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$3,535	\$42,875,529	\$3,592	\$34,002,047	\$3,560	\$76,877,576
	Auto/RV/Motorsports Dealership	\$9,271	\$112,435,401	\$10,605	\$100,401,214	\$9,856	\$212,836,615
	Auto Fuel	\$2,700	\$32,740,713	\$2,666	\$25,238,342	\$2,685	\$57,979,055
<b>TOTAL CATEGORIES</b>		<b>\$61,504</b>	<b>\$745,918,968</b>	<b>\$63,424</b>	<b>\$600,435,847</b>	<b>\$62,346</b>	<b>\$1,346,354,815</b>
<b>TOTAL (excluding Auto)</b>		<b>\$44,952</b>	<b>\$545,177,067</b>	<b>\$45,673</b>	<b>\$432,388,086</b>	<b>\$45,268</b>	<b>\$977,565,154</b>

### 3.4.3 Miscellaneous Inflow

Miscellaneous inflow spending accounts for a small percentage (5%) of overall Trade Area retail spending. In broad terms miscellaneous inflow is derived from passing motorists, visitors, or infrequent residents from outside of the Primary or Secondary Trade Areas.

Categories where miscellaneous inflow spending is likely to be higher included Grocery & Convenience, Pharmacy, and Quick Service F&B, while Comparison or Entertainment categories will be limited given the current inventory, but also the likely attraction of other larger markets.

Total retail miscellaneous inflow spending for 2023 was \$43.3 million and is expected to increase to \$48.6 million by 2028 and \$54.4 million by 2033.

Table 3-10. Miscellaneous Inflow Retail Spending: 2023, 2028, and 2033

(Source: Manifold Data Mining Inc. & FBM)

Miscellaneous Inflow Factor	Retail Spending by Merchandise Category	2023	2028	2033	
		BONNYVILLE Misc Inflow Spending	BONNYVILLE Misc Inflow Spending	BONNYVILLE Misc Inflow Spending	
Convenience & Day-to-Day Goods/Services	10.0%	Grocery & Convenience	\$22,636,848	\$25,404,448	\$28,433,375
	10.0%	Pharmacy	\$1,883,612	\$2,113,844	\$2,365,786
	2.5%	Alcohol & Tobacco	\$726,187	\$814,898	\$911,950
	5.0%	Personal Services	\$3,594,881	\$4,033,780	\$4,513,826
	10.0%	Health Care & Medical Services	\$1,679,248	\$1,884,708	\$2,109,641
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	1.0%	Fashion & Accessories	\$590,858	\$662,957	\$741,796
	0.5%	Jewelry	\$22,477	\$25,220	\$28,219
	5.0%	Beauty & Personal Care	\$1,706,306	\$1,914,649	\$2,142,534
	2.5%	Home Furniture & Décor	\$559,904	\$628,229	\$702,942
	1.0%	Appliances & Electronics	\$424,812	\$476,656	\$533,350
	2.5%	Home Improvement & Gardening	\$1,826,768	\$2,049,845	\$2,293,859
	0.0%	Books & Media	\$0	\$0	\$0
	0.0%	Sporting Goods	\$0	\$0	\$0
	0.0%	Toys & Hobbies	\$0	\$0	\$0
	5.0%	Specialty Retail	\$1,315,305	\$1,476,003	\$1,651,822
Leisure, Recreation & Entertainment Goods/Services	10.0%	Quick Service F&B	\$5,081,889	\$5,703,042	\$6,382,769
	5.0%	Restaurants & Pubs	\$2,895,132	\$3,248,919	\$3,636,028
	1.0%	Arts & Entertainment	\$53,291	\$59,803	\$66,929
	0.0%	Fitness & Leisure	\$0	\$0	\$0
Automotive Goods (excluding repair)	5.0%	Auto Parts & Accessories	\$3,060,964	\$3,434,853	\$3,843,879
	2.5%	Auto/RV/Motorsports Dealership	\$4,238,356	\$4,755,477	\$5,320,915
	5.0%	Auto Fuel	\$2,308,345	\$2,590,378	\$2,898,953
<b>5.1% TOTAL RETAIL CATEGORIES ONLY</b>			<b>\$54,605,183</b>	<b>\$61,277,708</b>	<b>\$68,578,573</b>
<b>TOTAL (excluding Auto)</b>			<b>\$43,318,271</b>	<b>\$48,612,292</b>	<b>\$54,405,184</b>

# 4.0 Commercial Supply

## 4.1 Introduction

The dynamics of the overall commercial market comprising retail and food & beverage shops and services, and street level office services provide critical indicators as to the performance of the Bonnyville’s commercial sectors and moreover the magnitude of demand and resulting opportunity for which certain market segments or gaps could be filled.

This section will provide a detailed inventory of the business mix (predominantly the ground floor) that comprise the current commercial market for the Town of Bonnyville, which serves as the core centrality for shops and services in the identified Trade Area. A detailed inventory is included in **Appendix A**.

The purpose of the inventory and evaluation is to identify a foundation for demand and current retail performance (also known as retail sales productivity) followed by identifying the potential types of tenants and/or merchandise categories for whom Bonnyville could be considered a compatible market for expansion or attraction.

## 4.2 Market Overview

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

The inventory was categorized into the same merchandise categories that were profiled in the retail spending to develop a direct comparison.

The market consists of three nodes:

- *Central*: 55 Street to 46 Street
- *West*: west of 55 Street
- *East*: east of 46 Street

**Figure 4-1** illustrates the boundaries of the three nodes with the summaries of the inventory.

## 4.3 Overall Inventory Summary

The full retail and business mix inventory for the Town of Bonnyville is summarized in **Table 4-1** and **Figure 4-1**.

The summary of the current inventory illustrates a total ground floor commercial space of 1,286,629 sf. This floorspace includes Community Service, Professional & Financial Services as well as Medical & Wellness Services.

When excluding these “non-retail” segments, as well as automotive categories, the “retail only” inventory equates to 604,462 sf.

## 4.4 Overall Retail Inventory by Category

**Table 4-1** and **Figure 4-1** provide a breakdown of the Town of Bonnyville’s retail inventory by category.

The Top 5 retail categories (excluding Professional & Financial Services and Auto) in terms of overall retail floor space are:

1. Grocery, Convenience & Specialty Foods (124,977 sf)
2. Full Service F&B (81,083 sf)
3. Home Improvement & Gardening (73,855 sf)
4. Limited Service F&B (72,330 sf)
5. Fashion & Footwear (42,342 sf)

The Top 5 are followed closely by Alcohol, Tobacco & Cannabis (41,112 sf) and Beauty & Personal Care (31,939 sf).

Overall, as shown in **Table 4-1** Bonnyville has a mix of 78% local businesses to 22% in terms of the overall store count and a mix of 65% local to 35% branded in terms of the floorspace. Not unexpectedly, the local businesses are typically smaller in size, while the recognized branded businesses are larger.

The established Trade Area size of Bonnyville suggests that another general merchandiser such as a Walmart could provide a further offering to solidify and strengthen the current market share in the fashion category.

**Table 4-1. Bonnyville Retail Mix Summary**

(Source: FBM)

Total RETAIL only			
604,462	Local	102	
	Brand	28	
business count	Local	78%	
business count	Brand	22%	
floorspace	Local	395,885	
floorspace	Brand	208,577	
floorspace	Local	65%	
floorspace	Brand	35%	
	Avg Local Size	3,881	
	Avg Branded Size	7,449	

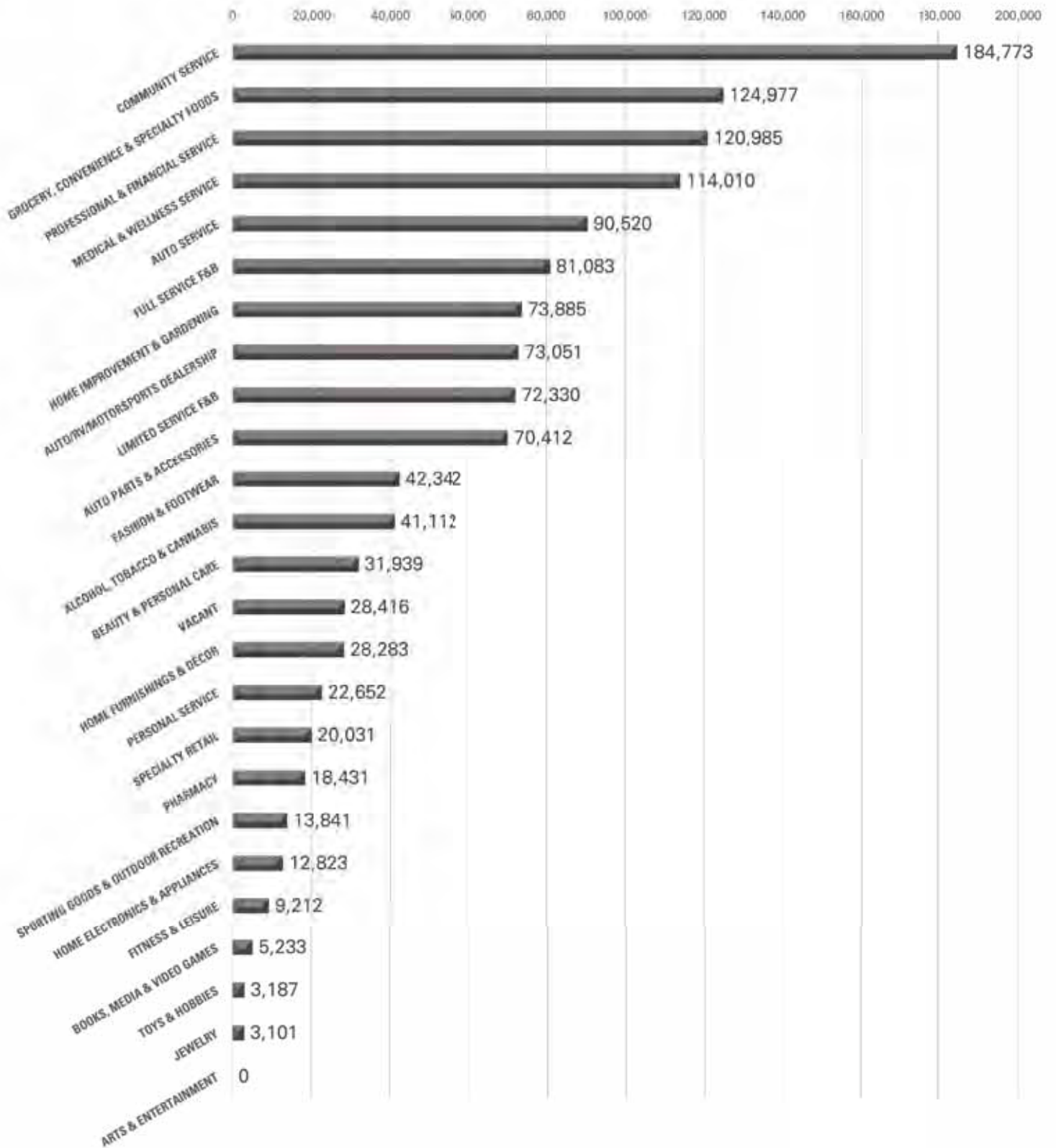
Table 4-2. The Town of Bonnyville Commercial Inventory Total

(Source: FBM)

RETAIL MERCHANDISE or BUSINESS CATEGORY	General Classification	ALL NODES FLOORSPACE (sq. ft.)	ALL NODES FLOORSPACE MIX (%)
COMMUNITY SERVICE	Non-Retail	184,773	14.4%
GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail	124,977	9.7%
PROFESSIONAL & FINANCIAL SERVICE	Non-Retail	120,985	9.4%
MEDICAL & WELLNESS SERVICE	Non-Retail	114,010	8.9%
AUTO SERVICE	Auto	90,520	7.0%
FULL SERVICE F&B	Retail	81,083	6.3%
HOME IMPROVEMENT & GARDENING	Retail	73,885	5.7%
AUTO/RV/MOTORSPORTS DEALERSHIP	Auto	73,051	5.7%
LIMITED SERVICE F&B	Retail	72,330	5.6%
AUTO PARTS & ACCESSORIES	Auto	70,412	5.5%
FASHION & FOOTWEAR	Retail	42,342	3.3%
ALCOHOL, TOBACCO & CANNABIS	Retail	41,112	3.2%
BEAUTY & PERSONAL CARE	Retail	31,939	2.5%
<b>VACANT</b>	N/A	28,416	2.2%
HOME FURNISHINGS & DÉCOR	Retail	28,283	2.2%
PERSONAL SERVICE	Retail	22,652	1.8%
SPECIALTY RETAIL	Retail	20,031	1.6%
PHARMACY	Retail	18,431	1.4%
SPORTING GOODS & OUTDOOR RECREATION	Retail	13,841	1.1%
HOME ELECTRONICS & APPLIANCES	Retail	12,823	1.0%
FITNESS & LEISURE	Retail	9,212	0.7%
BOOKS, MEDIA & VIDEO GAMES	Retail	5,233	0.4%
TOYS & HOBBIES	Retail	3,187	0.2%
JEWELRY	Retail	3,101	0.2%
ARTS & ENTERTAINMENT	Retail	0	0.0%
<b>TOTAL - all streetfront inventory</b>		<b>1,286,629</b>	
<b>Retail ONLY Floorspace (excluding Medical &amp; Wellness, Professional, Auto &amp; Vacant)</b>		<b>604,462</b>	

Figure 4-1. Bonnyville Commercial Inventory Total (Sorted Largest to Smallest Floorspace)

(Source: FBM)



## 4.5 Retail Inventory By Node

### Central Summary (refer to Figure 4-3, Figure 4-7 & Table 4-3)

Central community is the area between 46 Street and 55 Street. The Central area is dominated by Medical & Wellness Services as well as Professional Services and further represents the spine of the community's downtown/main street and primary retail vehicular artery. This area is home to broadest cross-section, number and floorspace of retail shops and services totalling 535,539 sf or almost half of the total streetfront inventory in Bonnyville. As such, this area remains the heart of the community for local business opportunities wherein the ratio of local to branded businesses is the highest. Some new retail is entering the central area in the form of Dollarama.

Figure 4-2. Bonnyville Commercial Nodes

(Source: Google Maps, edited by FBM)

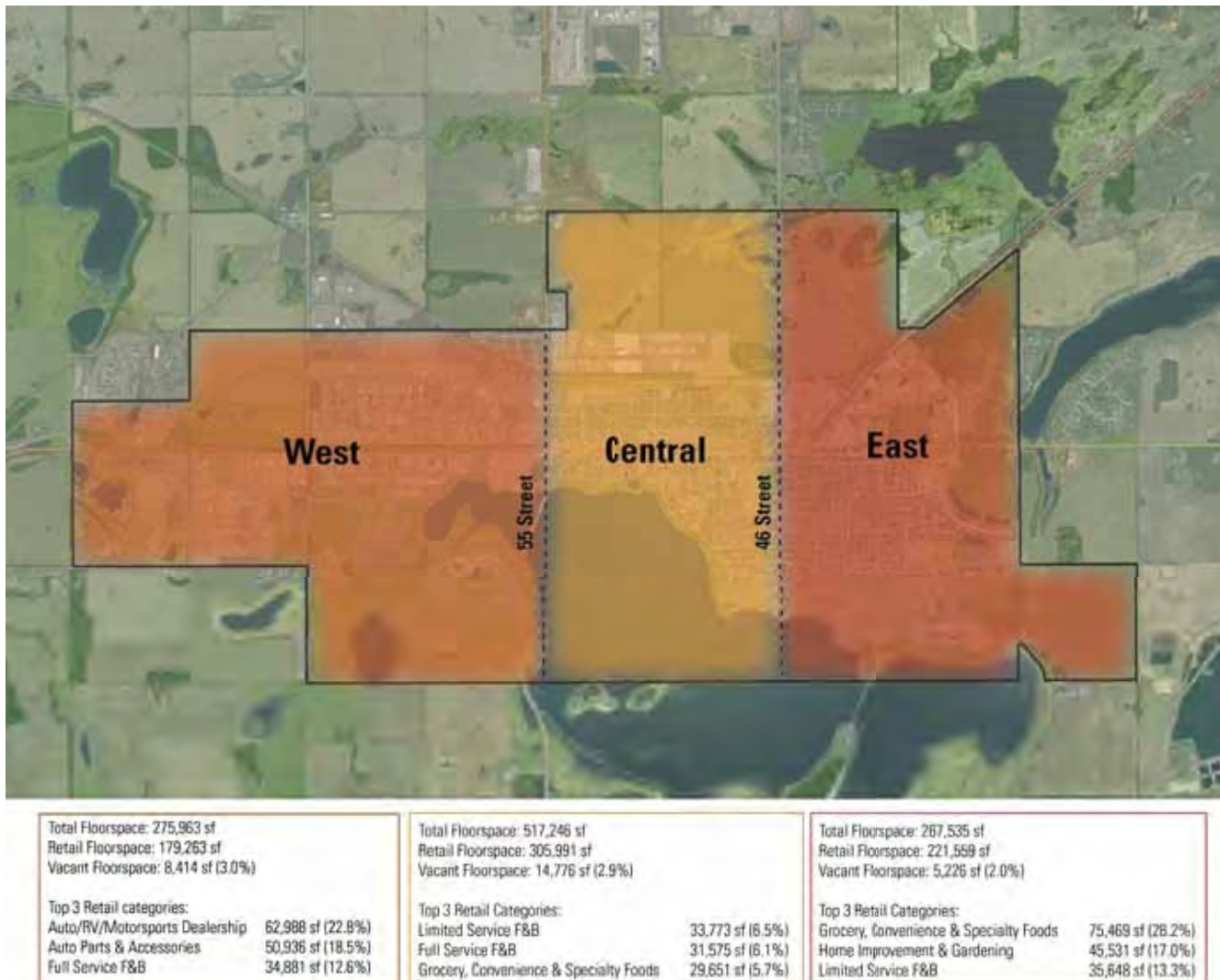
### West Summary (refer to Figure 4-4, Figure 4-8 & Table 4-4)

The West community refers to the area west of 55 Street. This area extends from the Downtown and represents the west gateway into the community. Retail shops and services are intermixed with non-commercial light industrial activity and is more dispersed along the corridor.

In terms of retail compatible floorspace there is approximately 287,000 sf of which automotive service, dealerships and parts & accessories account for 64% of the floorspace.

### East Summary (refer to Figure 4-5, Figure 4-9 & Table 4-5)

The East community is the community east of 46 Street and represents the most prominent growth opportunity in the community. In addition to being the home of larger and branded format retailers such as Wholesale Club, Sobeys and Marks, the East Gate



community is the newest retail development node currently anchored by retail brands including Coop Home Centre, Boston Pizza, Mary Brown's. The area is also home to a cluster of hotels, the major civic and recreation centre as well as new single family and multi-unit residential neighbourhoods. Some new retail is also under construction in the form of a Burger King opposite Sobeys.

The East community also included a few businesses in residential areas. Businesses in the residential area included hair salon, apartment rental agency, travel agency, catering service, construction company, manufacturing and massage therapy.

While the current inventory in the east is estimated at just under 280,000 sf, it is reasonably expected that the amount of floorspace could double in this area over the next decade. With ongoing growth in the community and a total trade area of almost 50,000 persons, East Gate is primed to be the location of choice for new retailers in Bonnyville.

## 4.6 Overall Retail Vacancy

A review of the current vacancy and nature of the vacancies provides additional cues for prospective business interests in the community. The current overall vacancy is estimated at 2.2%. This vacancy is very positive and suggests healthy retail market with opportunity to support new demand for retail space. As an industrial-accepted comparable, 4-5% is considered a healthy retail environment.

## 4.7 Retail Space Per Capita

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

As a starting point, **Figure 4-6** depicts the Target Retail Space Per Capita, which provides a baseline for determining how much retail per capita is best suited to a community, according to its population size.

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

The current retail space per capita, as calculated by FBM takes into account a trade area beyond simply

Bonnyville's geopolitical boundary, by using a drive time analysis and other criteria to form the retail trade area (as noted previously).

**Figure 4-6** is meant to illustrate a general indication of retail opportunity and representation for communities, with an understanding that some variations do exist.

Many location specific factors contribute to an area's overall retail market, and cannot be addressed in a general chart or graph. Such locational factors can include specialized demands of a community, or unique characteristics that warrant certain retail traits. Aside from unique locational factors that each retail trade area has, **Figure 4-6** provides beneficial direction and insight for communities of their retail market.

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

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

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

Using **Figure 4-6** as a benchmark for retail space in communities and for a comparable market like Bonnyville which is more rural and reaches a wider area given the more remote nature, this figure should fall in the 25 to 35 sf per capita range.

Accordingly, the estimated retail space per capita ratio for Bonnyville and its 27,239 person Primary retail trade area is in the range of 22.2 sf/capita if not including non-retail street front space and not accounting for other limited retail in the trade area. Bonnyville should be striving for a target retail space per capita ratio of 25 to 30 sf/capita. For example, a trade area of 27,000 residents supporting a per capita ratio of 25 to 30 sf would result in a total supportable inventory of between 675,000 to 810,000 sf or **approximately 75,000 to 200,000 sf more than exists today (for retail-specific categories)**. When looking at the current growth of Bonnyville, particularly in the East, it is not inconceivable that this is where new demand would be most desirable.

Figure 4-3. Bonnyville Commercial Node: Central

(Source: Google Maps, edited by FBM)

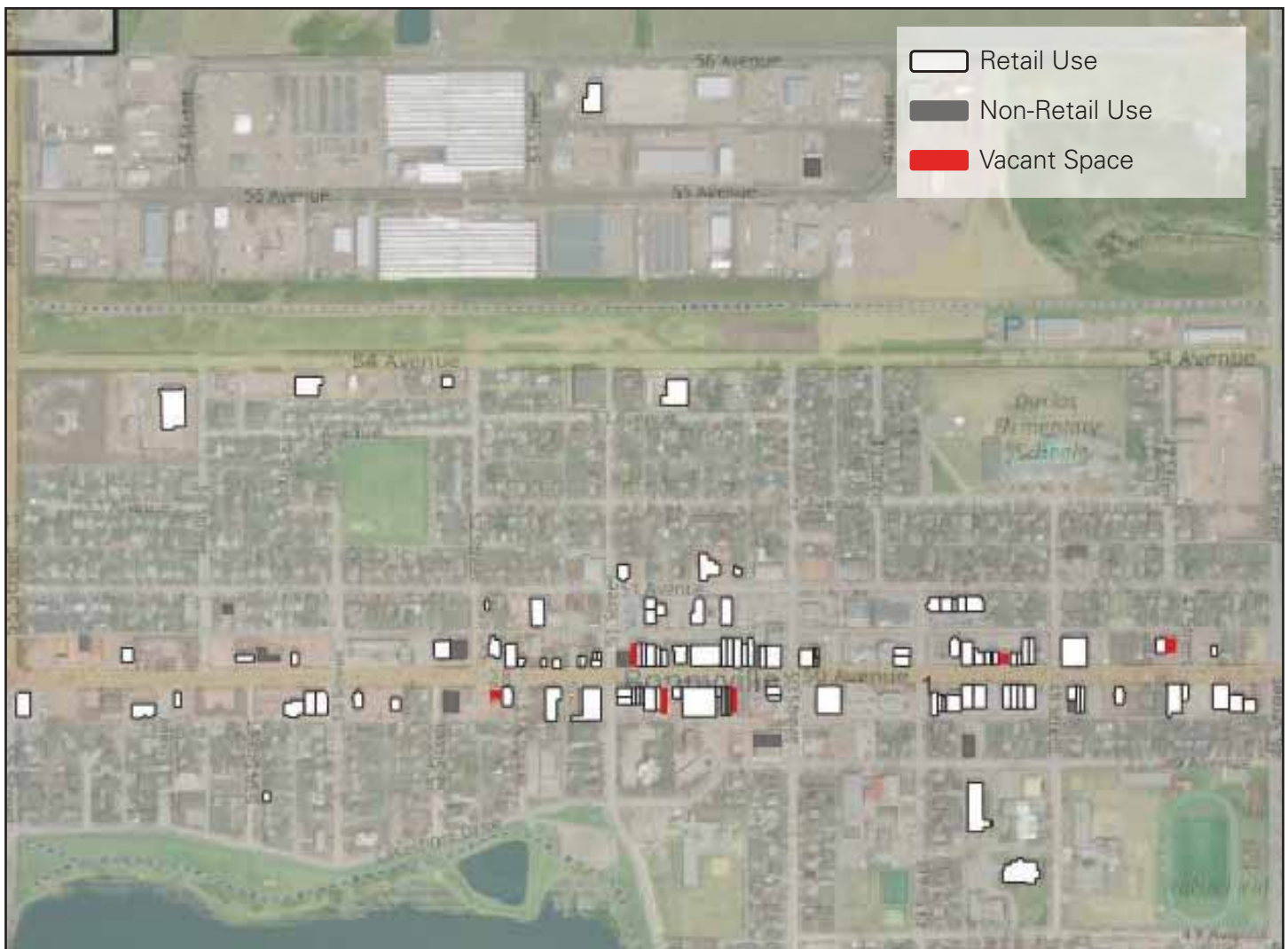


Figure 4-4. Bonnyville Commercial Node: West

(Source: Google Maps, edited by FBM)



Figure 4-5. Bonnyville Commercial Node: East

(Source: Google Maps, edited by FBM)



Figure 4-6. Bonnyville Retail Space Per Capita

(Source: FBM)

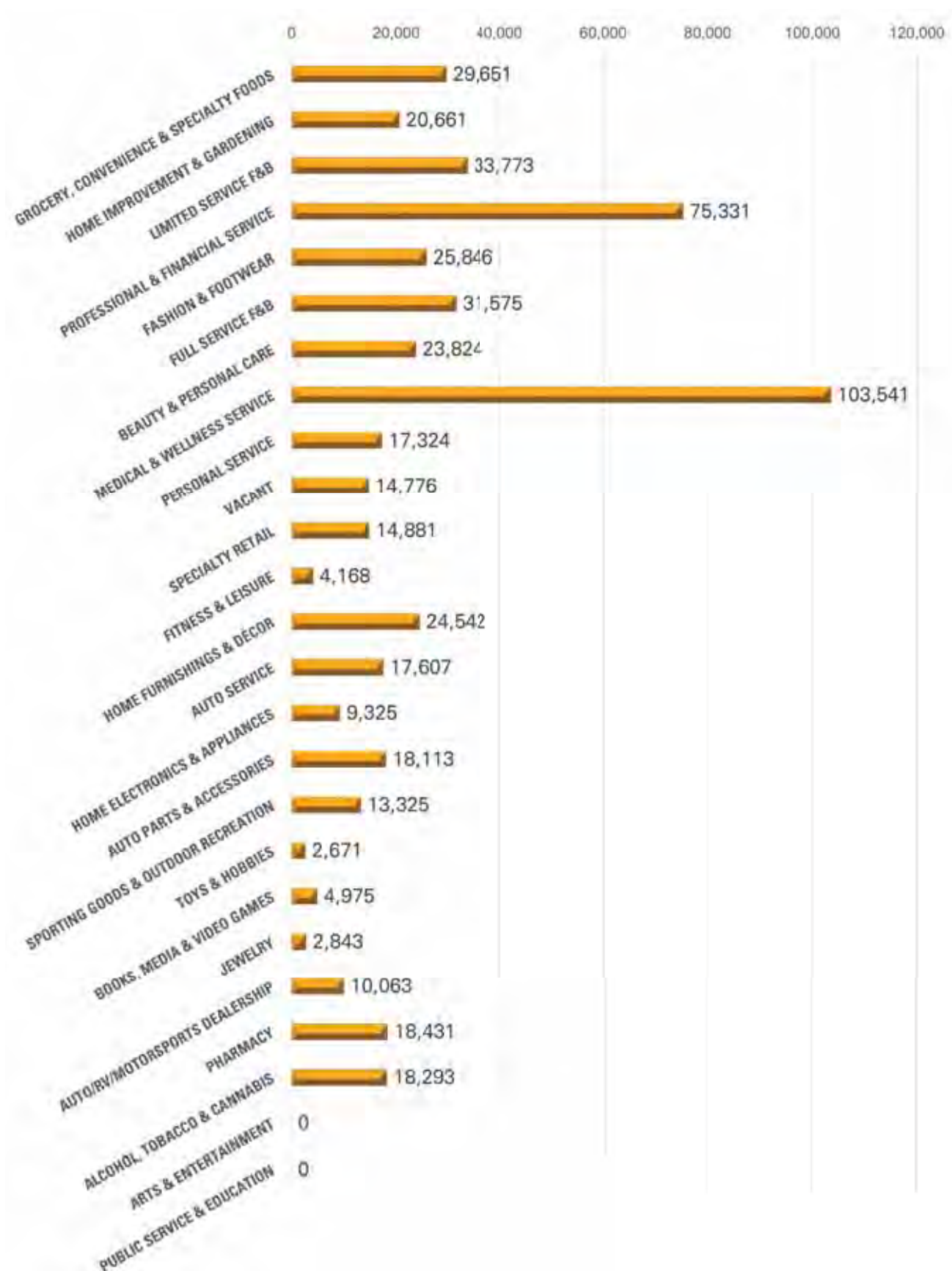


BONNYVILLE'S PER CAPITA RETAIL RATIO IS 22.2 sq. ft. per capita when applied against the PRIMARY trade area population of 27,239

An appropriate target for the County's Trade Area should be in the range of 25 to 30 sq. ft per capita

Figure 4-7. Central Commercial Inventory Total (Sorted Largest to Smallest Floorspace)

(Source: FBM)



**Table 4-3. Central Commercial Inventory**

(Source: FBM)

MERCHANDISE CATEGORY	BONNYVILLE CENTRAL FLOORSPACE (sq. ft.)	BONNYVILLE CENTRAL MIX (%)
GROCERY, CONVENIENCE & SPECIALTY FOODS	29,651	5.5%
HOME IMPROVEMENT & GARDENING	20,661	3.9%
LIMITED SERVICE F&B	33,773	6.3%
PROFESSIONAL & FINANCIAL SERVICE	75,331	14.1%
FASHION & FOOTWEAR	25,846	4.8%
FULL SERVICE F&B	31,575	5.9%
BEAUTY & PERSONAL CARE	23,824	4.4%
MEDICAL & WELLNESS SERVICE	103,541	19.3%
PERSONAL SERVICE	17,324	3.2%
VACANT	14,776	2.8%
SPECIALTY RETAIL	14,881	2.8%
FITNESS & LEISURE	4,168	0.8%
HOME FURNISHINGS & DÉCOR	24,542	4.6%
AUTO SERVICE	17,607	3.3%
HOME ELECTRONICS & APPLIANCES	9,325	1.7%
AUTO PARTS & ACCESSORIES	18,113	3.4%
SPORTING GOODS & OUTDOOR RECREATION	13,325	2.5%
TOYS & HOBBIES	2,671	0.5%
BOOKS, MEDIA & VIDEO GAMES	4,975	0.9%
JEWELRY	2,843	0.5%
AUTO/RV/MOTORSPORTS DEALERSHIP	10,063	1.9%
PHARMACY	18,431	3.4%
ALCOHOL, TOBACCO & CANNABIS	18,293	3.4%
ARTS & ENTERTAINMENT	0	0.0%
PUBLIC SERVICE & EDUCATION	0	0.0%

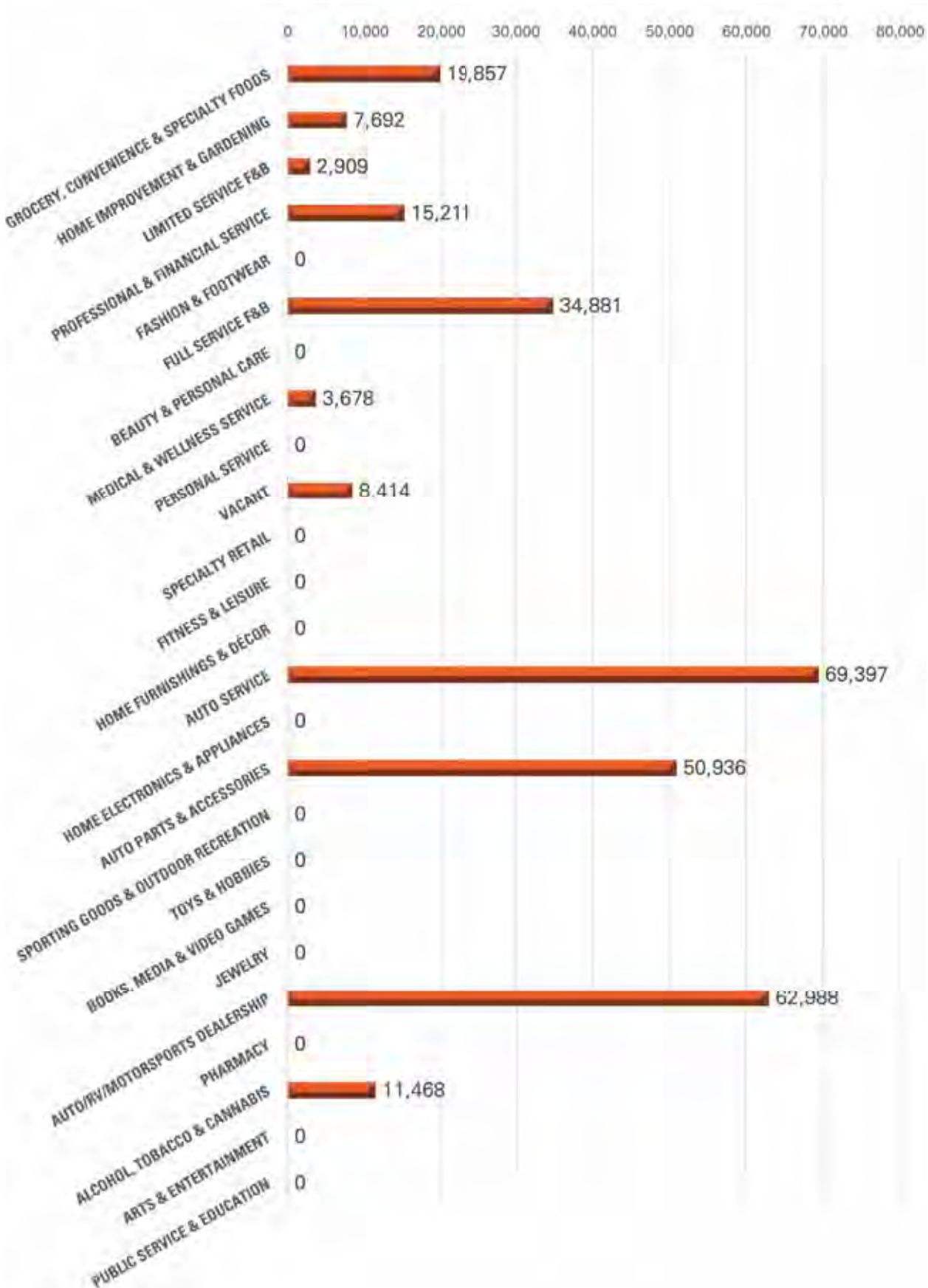
**TOTAL 535,539**

**Retail ONLY Floorspace (excl Medical & Wellness, Professional, Auto Service & Vacant) 324,284 61%**



Figure 4-8. West Commercial Inventory Total (Sorted Largest to Smallest Floorspace)

(Source: FBM)



**Table 4-4. West Commercial Inventory**

(Source: FBM)

MERCHANDISE CATEGORY	BONNYVILLE WEST FLOORSPACE (sq. ft.)	BONNYVILLE WEST MIX (%)
GROCERY, CONVENIENCE & SPECIALTY FOODS	19,857	6.9%
HOME IMPROVEMENT & GARDENING	7,692	2.7%
LIMITED SERVICE F&B	2,909	1.0%
PROFESSIONAL & FINANCIAL SERVICE	15,211	5.3%
FASHION & FOOTWEAR	0	0.0%
FULL SERVICE F&B	34,881	12.1%
BEAUTY & PERSONAL CARE	0	0.0%
MEDICAL & WELLNESS SERVICE	3,678	1.3%
PERSONAL SERVICE	0	0.0%
VACANT	8,414	2.9%
SPECIALTY RETAIL	0	0.0%
FITNESS & LEISURE	0	0.0%
HOME FURNISHINGS & DÉCOR	0	0.0%
AUTO SERVICE	69,397	24.1%
HOME ELECTRONICS & APPLIANCES	0	0.0%
AUTO PARTS & ACCESSORIES	50,936	17.7%
SPORTING GOODS & OUTDOOR RECREATION	0	0.0%
TOYS & HOBBIES	0	0.0%
BOOKS, MEDIA & VIDEO GAMES	0	0.0%
JEWELRY	0	0.0%
AUTO/RV/MOTORSPORTS DEALERSHIP	62,988	21.9%
PHARMACY	0	0.0%
ALCOHOL, TOBACCO & CANNABIS	11,468	4.0%
ARTS & ENTERTAINMENT	0	0.0%
PUBLIC SERVICE & EDUCATION	0	0.0%

**TOTAL 287,431**

**Retail ONLY Floorspace (excl Medical & Wellness, Professional, Auto Service & Vacant) 190,731 66%**



Figure 4-9. East Commercial Inventory Total (Sorted Largest to Smallest Floorspace)

(Source: FBM)

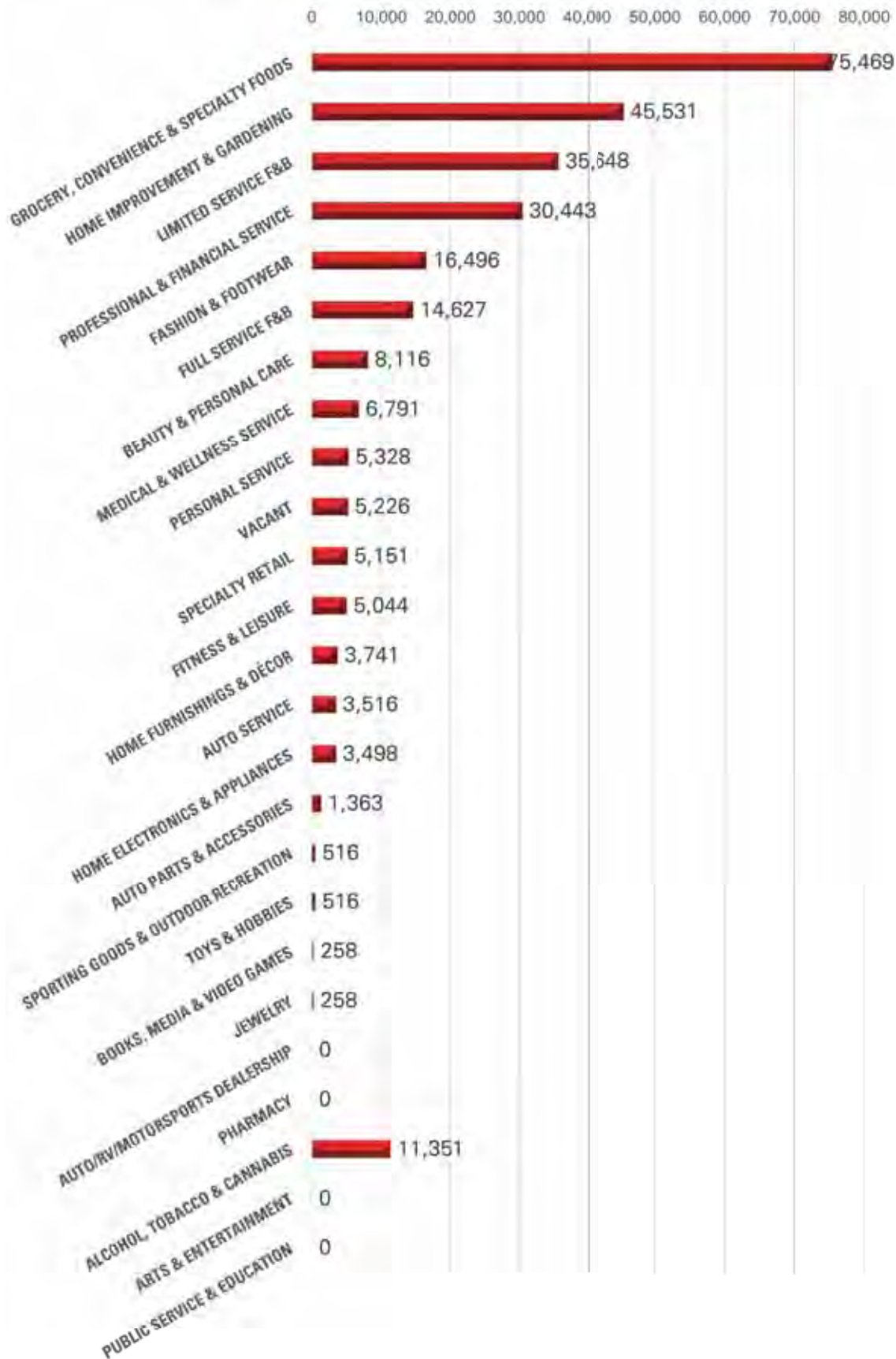


Table 4-5. East Commercial Inventory

(Source: FBM)

MERCHANDISE CATEGORY	BONNYVILLE EAST FLOORSPACE (sq. ft.)	BONNYVILLE EAST MIX (%)
GROCERY, CONVENIENCE & SPECIALTY FOODS	75,469	27.1%
HOME IMPROVEMENT & GARDENING	45,531	16.3%
LIMITED SERVICE F&B	35,648	12.8%
PROFESSIONAL & FINANCIAL SERVICE	30,443	10.9%
FASHION & FOOTWEAR	16,496	5.9%
FULL SERVICE F&B	14,627	5.2%
BEAUTY & PERSONAL CARE	8,116	2.9%
MEDICAL & WELLNESS SERVICE	6,791	2.4%
PERSONAL SERVICE	5,328	1.9%
VACANT	5,226	1.9%
SPECIALTY RETAIL	5,151	1.8%
FITNESS & LEISURE	5,044	1.8%
HOME FURNISHINGS & DÉCOR	3,741	1.3%
AUTO SERVICE	3,516	1.3%
HOME ELECTRONICS & APPLIANCES	3,498	1.3%
AUTO PARTS & ACCESSORIES	1,363	0.5%
SPORTING GOODS & OUTDOOR RECREATION	516	0.2%
TOYS & HOBBIES	516	0.2%
BOOKS, MEDIA & VIDEO GAMES	258	0.1%
JEWELRY	258	0.1%
AUTO/RV/MOTORSPORTS DEALERSHIP	0	0.0%
PHARMACY	0	0.0%
ALCOHOL, TOBACCO & CANNABIS	11,351	4.1%
ARTS & ENTERTAINMENT	0	0.0%
PUBLIC SERVICE & EDUCATION	0	0.0%

**TOTAL 278,886**

**Retail ONLY Floorspace (excl Medical & Wellness, Professional, Auto Service & Vacant) 232,910 84%**



# 5.0 Resident and Consumer Survey

## 5.1 Introduction

A community survey was conducted by FBM to inform the Gap Analysis. The purpose of this survey was to obtain feedback from Town of Bonnyville resident as well as visitors (non-residents) to identify current shopping preferences and patterns, the types of businesses the community would like to see, and where they should be located. Residents and non-Town residents were asked similar questions, with the resident survey containing more detailed questions about spending patterns. Both had the opportunity to provide general comments via an open ended question at the end of the survey.

The survey was conducted via an online survey in English which was shared with community members through the Town of Bonnyville website and Facebook page. The survey was open between October 6 – 27, 2023 and gained 556 responses. Of these, 227 (49%) were Town of Bonnyville residents and of the non-Town residents, 250 (44%) were from the Municipal District of Bonnyville. Other non-resident respondents lived in City of Cold Lake (24 people), St. Paul (5 people), Elk Point (4 people), and other communities (6 people) as shown in **Figure 5-1**.

Of all respondents, those between the ages of 35-44 years represented the largest demographic at 31% of the resident respondents and 30% of the non-resident respondents. Those between the ages of 25-34 years represented the second largest respondent segment at 22% of residents and 23% of non-residents.

The following is an aggregated summary of the total survey results for the resident survey and non-resident surveys. The full list of survey questions, response rates, and aggregated results is provided in **Appendix B**.

## 5.2 Spending Patterns

Approximately 78% of resident respondents prefer to shop for day-to-day conveniences in the Town, while an additional 19% of residents prefer to shop in Cold Lake. Comparatively, 21% of respondents prefer to shop in Town for bigger ticket items. For these larger purchases, 33% prefer to go to Edmonton while an additional 30% prefer to go to Cold Lake. Of non-resident respondents, most (82%) visit Town shops and services because they live in the area. Less than half (44%) work or own a business in the area or visit the hospital or other medical services (39%).

Figure 5-1. Survey Respondents Postal Code Heat Map

(Source: FBM and Polaris)

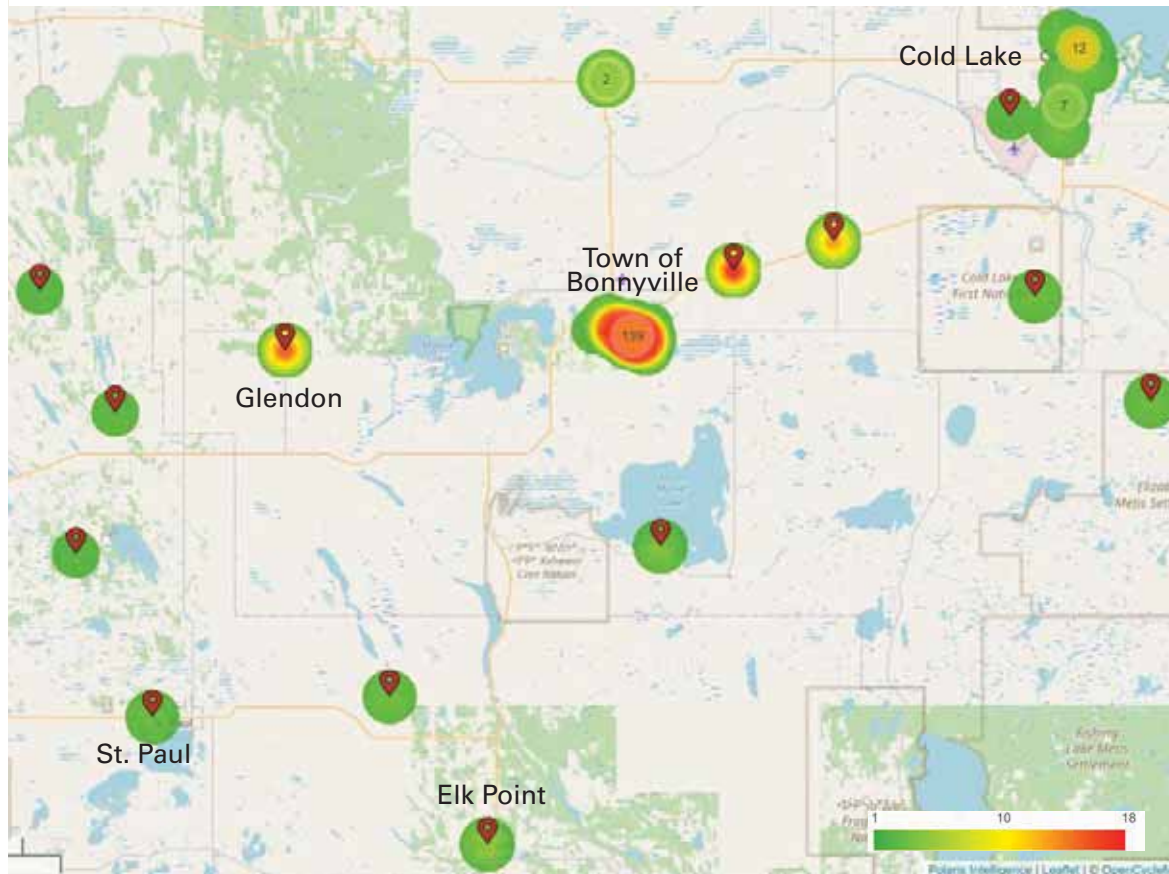


Table 5-1. Resident Respondent Household Spending Percentage Breakdown by Category

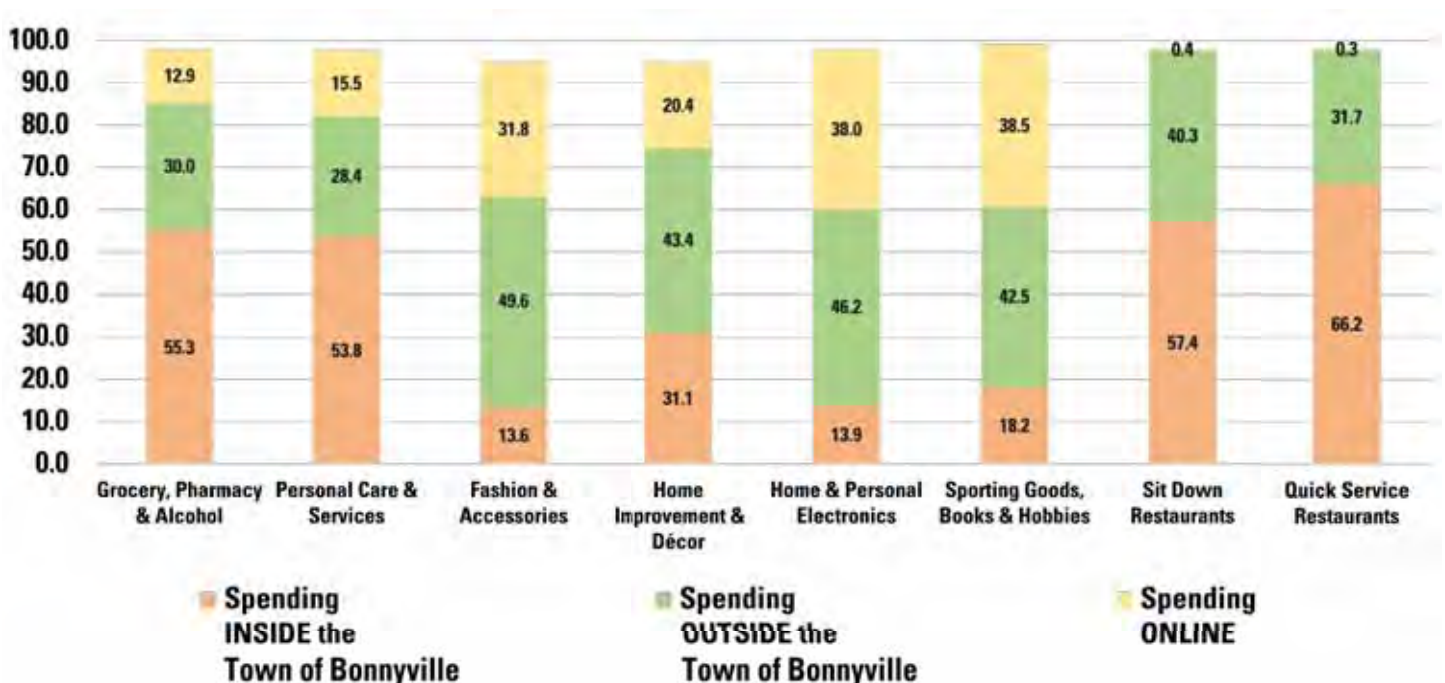
(Source: FBM with survey data)

Retail Merchandise & Spending Category (ON-LINE SURVEY)		Spending INSIDE the Town of Bonnyville	Spending OUTSIDE the Town of Bonnyville	Spending ONLINE
Grocery, Pharmacy & Alcohol	N=527	55.3	30.0	12.9
Personal Care & Services	N=323	53.8	28.4	15.5
Fashion & Accessories	N=298	13.6	49.6	31.8
Home Improvement & Décor	N=274	31.1	43.4	20.4
Home & Personal Electronics	N=242	13.9	46.2	38.0
Sporting Goods, Books & Hobbies	N=220	18.2	42.5	38.5
Sit Down Restaurants	N=204	57.4	40.3	0.4
Quick Service Restaurants	N=206	66.2	31.7	0.3
<b>Average</b>		<b>38.7</b>	<b>39.0</b>	<b>19.7</b>

**Note:** Not all the totals of Inside + Outside + Online equal 100% as not all respondents provided spending details across all categories. Therefore, tabulations were averaged and based on those respondents that did provide responses. In the table above **N=** \_\_\_ represents the number of responses for each spending category.

Figure 5-2. Resident Respondent Household Spending Percentage Breakdown by Category

(Source: FBM with survey data)



The responses from the respondents with respect to their spending habits “inside” of Bonnyville illustrate a lower than expected sales retention in the conveniences category at less than 55%. This suggests that the market might benefit from increased competition in this sector to retain more spending (i.e. Coop Grocery). Conversely, the food & beverage spending retention is quite healthy and suggests that any prospecting should be well targeted. The recent additions of Boston Pizza and Mary Brown’s are likely contributors to increasing spending inside Bonnyville.

Not unexpectedly, the role of on-line spending continues to be a factor, where it would seem that the online spending in Bonnyville is higher than the national average, which is estimated to be around 8% - 10%. In a rural or secondary market, this is a common trend where categories such as Fashion, Home & Decor, Home & Personal Electronics and Sporting Goods, Books & Hobbies are prominent.

Amongst residents, the categories of Quick Service Restaurants (66.2%), Sit Down restaurants (57.4%), Grocery, Pharmacy & Alcohol (55.3%) and Personal Care & Services (53.8%) garnered the highest portions of in-town household spending (**Table 5-1** and **Figure 5-2**). Fashion and Accessories (13.6%) and Home & Personal Electronics (13.9%) accounted for the lowest portion of in-Town household spending (13.6% and 13.9% respectively), and the highest portion of household spending outside the Town (49.6% and 46.2% respectively). Household spending online was highest in the Sporting Goods, Books & Hobbies (38.5%) and Fashion & Accessories (31.8%) categories.

### 5.3 Gaps in Goods and Services

When asked their primary reasons for not using Town shops and services, resident and non-resident responses were quite similar. Top reasons included missing specific merchandise (84% of resident and 81% of non-resident respondents), cost of goods and services (69% of residents and 51% of non-residents) and missing specific retailer (62% for residents and 67% for non-residents). When residents were asked what shops or services are missing in Town, Fashion & Accessories was selected by 87% of respondents. The categories of Fitness & Entertainment (47%), Sporting Goods, Books & Hobbies (45%), Sit Down Restaurants & Pubs (45%), Home & Personal Electronics (44%) and Home Improvement & Decor (43%) were fairly evenly ranked. The desire for clothing and shoe stores for youth, families and women were often mentioned in the open form responses. The perceived overabundance of certain stores (i.e. cannabis, liquor and pizza) was frequently

commented on as an undesirable aspect of the Town. Alternative food options are sought. These including but are not limited to sit down restaurants, healthier dining options, multicultural food options, coffee shops (a new coffee shop did open in December 2023), and higher end places to eat.

Survey respondents frequently commented on the lack of retail variety and centralized shopping in the Town of Bonnyville. The neighbouring communities of Cold Lake and St. Paul were consistently seen as better places to shop to save money and access a greater retail variety for daily goods and services. The cost to drive to these communities was considered worthwhile by many for the cost savings on their purchases. Despite many resident respondents expressing a desire and preference to shop local, and 54% of respondents reportedly frequenting Town shops and services weekly, many commented that they found it difficult to shop local due to lack of variety and high local prices, especially for grocery items. Of the stores desired by respondents, low to mid-range department and big box stores were the most frequently requested (**Figure 5-3**). These suggestions are reflected in **Section 7** positioning.

Cold Lake in particular was consistently mentioned as an all-in-one destination where shoppers could see a movie, grab a meal and visit a variety of shops all in one trip. Entertainment opportunities were frequently considered to be quite limited and there was a strong desire to see more indoor entertainment and recreation facilities for youth, families and young adults in particular.

Some respondents felt Bonnyville was lagging behind neighboring communities in providing welcoming and inviting retail spaces and amenities to attract and retain residents. It is worth noting that in December 2023 a new bowling alley opened in the Town and respondents would likely not have been aware of this new community entertainment amenity. Additionally, some recent commentary by Roger Brooks also recommended an overall image clean up was needed for Bonnyville. Some respondents expressed concerns about “sketchy” people, vandalism and drug and alcohol use in Town which dissuaded them from walking in commercial neighborhoods. Perceptions that storefronts are rundown with limited upkeep and high vacancy rates further contributed to the unwelcoming feeling experienced by some respondents. When asked about their primary reasons for not using Bonnyville’s shops and services, cleanliness (10) and safety (4) were the most selected options for both residents and non-residents. Consideration could be given to modifying the current town Beautification loan program to cover only exterior facade improvements.



## 5.4 Future Direction

The majority of respondents expressed that the current retail status quo that has existed for many years is not working. The desire for change was evident in calls to welcome more businesses, increase the variety and affordability of local goods and services, increase entertainment and recreation options, attract and retain residents, and improve the experience of shopping in the Town of Bonnyville (**Figure 5-4**). There is hope for economic development, but also skepticism about what the Town should or could be based on what it has been in the past and what it is presently.

How a community chooses to position its retail offerings is a key part of economic development strategy. The views expressed through the survey reflect current community positioning as well as opportunities for future shifts.

This information informed the recommended business development activities and community positioning as detailed in **Section 7**. We thank everyone who completed this survey for their invaluable insight.

Figure 5-4. Survey Respondent Verbatim Quotes

(Source: FBM with survey data)



# 6.0 Market Demand Analysis

## 6.1 Introduction

The following section will assess the amount of supportable retail floorspace in the Town of Bonnyville justified by the present Trade Area (Primary + Secondary) and premised on estimates of the current market share of total available retail spending by the exiting primary and secondary trade areas as well as 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 Bonnyville.

## 6.2 Methodology

In most typical urban market scenarios, forecasting retail demand would largely be predicated and have a close correlation with population growth and the inherent opportunities that would naturally come from a growing trade area.

However in secondary or rural markets and since population growth forecasts in Bonnyville are not expected to show dramatic increases, an alternative approach to demand is applied. Demand forecasts are predicated on past population projections that did not show significant population growth, and therefore can be considered conservative in their outlook since it is becoming more realistic to view Bonnyville as having more positive growth dynamics over the next decade, as evidenced by the development in the east side of the community.

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 look at the notion of achieving a greater market share of the existing spending for categories that represent strength today. In particular, as will be shown, this greater market share will need to apply to the local and surrounding trade area, given what seems to be an underachieving overall sales retention estimated to be in the range of 36.4%.**

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 Bonnyville's businesses are generating.

A sounding board for retail productivities are the lease rates which are estimated to be in the range of \$10 - \$18 per sf in Bonnyville's west and central nodes including the core downtown, and in the range of \$20

to \$35 per sf in the east node, particularly where East Gate has begun to establish itself as the prime retail destination for new-to-market retailers.

On this basis, it is estimated that retail sales productivities in the community would average in the \$150 to \$250 per sf range with the possible exception of conveniences which could be in the range of \$400 to \$600 per sf.

By dividing the total Trade Area retail spending potential into the category-specific retail sales productivity estimates (measured in \$/sf), the estimated market share figures could be calculated from which a measure of supportable floorspace can be determined.

## 6.3 Demand Based on Existing Market Shares

The results of this approach is shown in **Table 6-1** which quantifies the total estimated market share of retail spending in Bonnyville's Trade Area (not including the Secondary Trade Area). **Table 6-1** reveals that Bonnyville's residents currently garner just under 37% of the available Trade Area spending. This means that almost 63% of the resident Trade Area spending is spent outside of the community. As a comparison, comparably sized communities to Bonnyville in the region may have a retention rate of 40% to 45%, which suggests that Bonnyville is under-retailed given its trade area attributes.

The estimated market shares reveal that a category such as Grocery & Specialty Foods is capturing 51% of the Trade Area spending, where in reality this figure should be more in the range of 70%. For example, if a new Coop Grocery were to open at East Gate it could increase the market retention in this category and overall for the community.

It is important to note that Bonnyville's retail market is not solely based on its Primary Trade Area as evidenced by the fact that retailers such as Wholesale Club and The Brick, among others have chosen to select Bonnyville as a location. Additionally, Fashion & Accessories (including Footwear) exhibit an above average retention of spending for a rural market whereby 25% of Primary Trade Area spending is retained. The extension of Bonnyville's Trade Area suggests that the community is the benefactor of notable sales inflow from its Secondary Trade Area, as well as miscellaneous inflow from seasonal and regional visitor segments and passing motorists.

Table 6-1. Estimated Market Share Retention of Retail Spending in Bonnyville, 2023

(Source: FBM & Manifold Data Mining Inc.)

Retail Spending by Merchandise Category		2023			
		BONNYVILLE Sales Productivity (\$psf)	BONNYVILLE Estimated Market Share	Market Share Sales \$	Current Retail Floorspace (sf)
Convenience & Day-to-Day Goods/Services	Grocery & Specialty Foods	\$539	51%	\$67,320,762	124,977
	Pharmacy	\$525	90%	\$9,676,275	18,431
	Alcohol & Tobacco	\$351	89%	\$14,442,041	41,112
	Personal Services	\$127	7%	\$2,877,446	22,652
	<i>Health Care &amp; Medical (not applicable)</i>				
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	\$176	24%	\$7,463,848	42,342
	Jewelry	\$258	34%	\$799,926	3,101
	Beauty & Personal Care	\$131	22%	\$4,173,471	31,939
	Home Furniture & Décor	\$203	48%	\$5,730,848	28,283
	Appliances & Electronics	\$313	18%	\$4,012,029	12,823
	Home Improvement & Gardening	\$163	30%	\$12,059,954	73,885
	Books & Media	\$109	6%	\$571,640	5,233
	Sporting Goods	\$171	28%	\$2,368,152	13,841
	Toys & Hobbies	\$138	7%	\$440,865	3,187
Specialty Retail	\$157	21%	\$3,139,955	20,031	
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$302	75%	\$21,835,240	72,330
	Restaurants & Pubs	\$253	63%	\$20,533,389	81,083
	Arts & Entertainment	\$1	0%	\$0	0
	Fitness & Leisure	\$92	18%	\$846,353	9,212
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$256	53%	\$17,992,521	70,412
	Auto/RV/Motorsports Dealerships	\$259	21%	\$18,924,430	73,051
	<i>Auto Fuel (not applicable)</i>				
<b>TOTAL RETAIL CATEGORIES ONLY</b>		<b>\$288</b>	<b>36.4%</b>	<b>\$215,209,145</b>	<b>747,925</b>
<b>TOTAL (excluding Auto)</b>		<b>\$295</b>	<b>41.2%</b>	<b>\$178,292,194</b>	<b>604,462</b>

As Bonnyville begins to enter a new trajectory in terms of population growth, one of the best opportunities to capture more of this spending and further entrench Bonnyville as a strong retail node would likely be through the introduction of a General Merchandise retailers like a Walmart (~100,000+ sf format) and Canadian Tire (~50,000 sf format) which could bolster many of the category product offerings and increase the market capture of trade area spending.

To illustrate the impact on future demand in Bonnyville, **Tables 6-2 and 6-3** illustrate the amount of future demand that could be possible simply based on maintaining the current market shares and sales productivity.

**The result of this forecast reveals that by 2033, Bonnyville could support an additional new 195,297 sf of retail space.**

The combined categories that would be most notable in this would be Conveniences at 54,096 sf and House & Home at 30,026 sf.

On the surface, the Conveniences would include almost 32,634 sf in Grocery. This figure would be sufficient to supportive of an additional grocery format, but equally speaking in combination with the House & Home category as well as some of the others, it may be supportive of a larger box format General Merchandise retailer like Walmart or more home goods related like JYSK.

The current market share figures also indicate support for further Automotive opportunities. The Restaurant sector, which is still recovering from the COVID-19 pandemic where CERB loans are coming due is nonetheless illustrative of future growth, most likely to be in the form of new-to-market branded or franchise food & beverage formats.

Table 6-2. Estimated Retail Demand by 2033 (Based on Maintaining Current Market Share)

(Source: FBM & Manifold Data Mining Inc.)

Retail Spending by Merchandise Category	2033				2023 to 2033		
	BONNYVILLE Sales Productivity (\$psf)	BONNYVILLE Estimated Market Share	Market Share Sales \$	Total New Retail Floorspace (sf)	Current City Retail Inventory (sf)	Total Cumulative NEW Floorspace Demand (sf)	
Convenience & Day-to-Day Goods/Services	Grocery & Specialty Foods	\$539	51%	\$84,899,429	32,634	124,977	32,634
	Pharmacy	\$525	90%	\$12,202,925	4,813	18,431	4,813
	Alcohol & Tobacco	\$351	89%	\$18,213,119	10,735	41,112	10,735
	Personal Services	\$127	7%	\$3,628,799	5,915	22,652	5,915
	<i>Health Care &amp; Medical (not applicable)</i>						
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	\$176	24%	\$9,412,794	11,056	42,342	11,056
	Jewelry	\$258	34%	\$1,008,801	810	3,101	810
	Beauty & Personal Care	\$131	22%	\$5,263,240	8,340	31,939	8,340
	Home Furniture & Décor	\$203	48%	\$7,227,276	7,385	28,283	7,385
	Appliances & Electronics	\$313	18%	\$5,059,642	3,348	12,823	3,348
	Home Improvement & Gardening	\$163	30%	\$15,209,026	19,293	73,885	19,293
	Books & Media	\$109	6%	\$720,906	1,366	5,233	1,366
	Sporting Goods	\$171	28%	\$2,986,520	3,614	13,841	3,614
	Toys & Hobbies	\$138	7%	\$555,983	832	3,187	832
Specialty Retail	\$157	21%	\$3,959,854	5,230	20,031	5,230	
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$302	75%	\$27,536,815	18,887	72,330	18,887
	Restaurants & Pubs	\$253	63%	\$25,895,027	21,172	81,083	21,172
	Arts & Entertainment	\$1	0%	\$0	0	0	0
	Fitness & Leisure	\$92	18%	\$1,067,350	2,405	9,212	2,405
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$256	53%	\$22,690,693	18,386	70,412	18,386
	Auto/RV/Motorsports Dealerships	\$259	21%	\$23,865,940	19,075	73,051	19,075
	<i>Auto Fuel (not applicable)</i>						
<b>TOTAL RETAIL CATEGORIES ONLY</b>		<b>\$288</b>	<b>36.4%</b>	<b>\$271,404,139</b>	<b>195,297</b>	<b>747,925</b>	<b>195,297</b>
<b>TOTAL (excluding Auto)</b>		<b>\$295</b>	<b>41.2%</b>	<b>\$224,847,506</b>	<b>157,836</b>	<b>28,416</b>	<b>166,881</b>
						<b>(Vacant)</b>	

Forecasts to 2033 are premised on conservative, maintained rates of market share reveal demand for just under 200,000 sf of new floorspace. It would be reasonable to allocate a need for 5 to 10 acres of potential new land, assuming that 150,000 sf or more of the new floorspace would be occupied in new development, most likely at the already zoned and ready-to-build East Gate lands.

Table 6-3. Estimated Retail Demand Summary 2023 to 2033 (Based on Maintaining Current Market Share)

(Source: FBM & Manifold Data Mining Inc.)

Retail Merchandise Category	2023	2028	2033	2023 to 2033	
	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	207,172	25,736	54,096	207,172	54,096
Comparison or Department Store Type Merchandise (DSTM)	234,665	29,151	61,275	234,665	61,275
Leisure, Recreation & Entertainment Goods/Services	162,625	20,202	42,464	162,625	42,464
Automotive Goods (excluding repair)	143,463	17,821	37,461	143,463	37,461
<b>Total (sf)</b>	<b>747,925</b>	<b>92,910</b>	<b>195,297</b>	<b>747,925</b>	<b>195,297</b>

## 6.4 Demand Based on Increased Market Shares

Looking at current market shares however is only one possibility. There is an alternative direction for Bonnyville’s retail opportunity that lies in incrementally and slowly increasing the overall market share of sales, while still being cognizant of the fact that drive times to larger markets like Edmonton and Lloydminster will still prevail for many bigger ticket items. Increasing market share can be derived from attracting new-to-market retailers such as Canadian Tire or Walmart which often has the direct impact of benefitting of local retailers in the community.

**Tables 6-4 and 6-5** provide a forecast of future demand in terms of floorspace and land based on applying an increase of approximately 5% market share across all categories. While the reality may

dictate that some categories may not necessarily need to increase their market share, others may seek to increase more than 5%, the overall impact of the increase is that which is considered important in this analysis.

If the retained market shares presented previously in **Table 6-1** were to increase by 5%, the total demand by the year 2033, based on conservative population growth, **but with spending growth and increased retention could result in incremental new space of approximately 291,977 sf, or more than 100,000 sf than if the current market shares are maintained.**

Similarly, the analysis in this report does not take into account the market share of the Secondary Trade Area. **If a reasonable market share from this area was used, it could easily add a further 50,000 to 75,000 sf of supportable floorspace.**

**Table 6-4. Estimated Retail Demand by 2033 (Based on Increasing Current Market Share by 5%)**

(Source: FBM & Manifold Data Mining Inc.)

Retail Spending by Merchandise Category		2033				2023 to 2033	
		BONNYVILLE Sales Productivity (\$psf)	BONNYVILLE Estimated Market Share	Market Share Sales \$	Current Retail Floorspace (sf)	Current City Retail Inventory (sf)	Total Cumulative NEW Floorspace Demand (sf)
Convenience & Day-to-Day Goods/Services	Grocery & Specialty Foods	\$539	57%	\$93,601,620	48,789	124,977	48,789
	Pharmacy	\$525	99%	\$13,453,725	7,195	18,431	7,195
	Alcohol & Tobacco	\$351	98%	\$20,079,964	16,049	41,112	16,049
	Personal Services	\$127	8%	\$4,000,751	8,843	22,652	8,843
	<i>Health Care &amp; Medical (not applicable)</i>						
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	\$176	26%	\$10,377,605	16,530	42,342	16,530
	Jewelry	\$258	37%	\$1,112,203	1,211	3,101	1,211
	Beauty & Personal Care	\$131	25%	\$5,802,722	12,468	31,939	12,468
	Home Furniture & Décor	\$203	53%	\$7,968,072	11,041	28,283	11,041
	Appliances & Electronics	\$313	20%	\$5,578,255	5,006	12,823	5,006
	Home Improvement & Gardening	\$163	33%	\$16,767,951	28,843	73,885	28,843
	Books & Media	\$109	7%	\$794,799	2,043	5,233	2,043
	Sporting Goods	\$171	30%	\$3,292,638	5,403	13,841	5,403
	Toys & Hobbies	\$138	8%	\$612,971	1,244	3,187	1,244
Specialty Retail	\$157	23%	\$4,365,739	7,820	20,031	7,820	
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$302	83%	\$30,359,339	28,236	72,330	28,236
	Restaurants & Pubs	\$253	69%	\$28,549,268	31,653	81,083	31,653
	Arts & Entertainment	\$1	0%	\$0	0	0	0
	Fitness & Leisure	\$92	19%	\$1,176,754	3,596	9,212	3,596
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$256	58%	\$25,016,489	27,488	70,412	27,488
	Auto/RV/Motorsports Dealerships	\$259	23%	\$26,312,199	28,518	73,051	28,518
	<i>Auto Fuel (not applicable)</i>						
<b>TOTAL RETAIL CATEGORIES ONLY</b>		<b>\$288</b>	<b>40.1%</b>	<b>\$299,223,064</b>	<b>291,977</b>	<b>747,925</b>	<b>291,977</b>
<b>TOTAL (excluding Auto)</b>		<b>\$295</b>	<b>45.5%</b>	<b>\$247,894,375</b>	<b>235,971</b>	<b>28,416</b>	<b>263,561</b>
						Vacant	

If a 5% increase in demand was achieved, retail categories like Grocery could now be 48,789 sf and would be more than enough for a freestanding grocery anchor (e.g. Co-op, Freson's), although more realistically it would be part of a larger format retail operator with other merchandise categories like a Walmart.

Bonnyville is in the fortunate position to have very few vacancies and therefore much of the forecast demand could reasonably and realistically be accommodated in new builds, which would increase the town's commercial tax base while enhancing the marketability for prospective retailers, while leaving some of the older vacancies more attractive for new local startups or entrepreneurial enterprises.

Another goal should also be to ensure that existing businesses are in a strong positioning to increase their market share and resulting sales and profitability.

This is important because the entry of new more recognized retailers can have a short term impact on local businesses that sell similar products or services. Strong retailers however are able to raise their bar to meet competition and can benefit from the bigger draw that new retailers can have for a community like Bonnyville.

While in many rural markets retail growth is not always about adding new retail, but creating an environment for stronger retention and performance of existing businesses, Bonnyville is a market that has a stable and strong trade area, and room for growth.

**The retail demand forecasts suggest a good opportunity for future retail and there are tenants capable of moving the needle for sales retention and attraction in Bonnyville. Most notably, these include Walmart, Canadian Tire, Giant Tiger, Dollar Tree, Value Village, JYSK and Bulk Barn, to name a few.**

Table 6-5. Estimated Retail Demand Summary 2023 to 2033 (Based on Increasing Current Market Shares by 5%)

(Source: FBM & Manifold Data Mining Inc.)

Retail Merchandise Category	2023	2028	2033	Current City Retail Inventory (sf)	Total Future NEW Demand (sf)
	Current Floorspace Supply (sf)	Cumulative NEW Floorspace Demand (sf)	Cumulative NEW Floorspace Demand (sf)		
Convenience & Day-to-Day Goods/Services	207,172	37,381	80,876	207,172	80,876
Comparison or Department Store Type Merchandise (DSTM)	234,665	42,342	91,609	234,665	91,609
Leisure, Recreation & Entertainment Goods/Services	162,625	29,343	63,486	162,625	63,486
Automotive Goods (excluding repair)	143,463	25,886	56,005	143,463	56,005
<b>Total (sf)</b>	<b>747,925</b>	<b>134,952</b>	<b>291,977</b>	<b>747,925</b>	<b>291,977</b>

# 7.0 Key Findings

## 7.1 Introduction

This section highlights the key findings of the Commercial Gap Analysis as well as documenting some general retail trends that are noteworthy and relevant to Bonnyville’s locational, demographic and economic contexts.

## 7.2 Developing Successful Retail

According to ICSC’s “Developing Successful Retail in Secondary and Rural Markets,” targeted retail recruitment should reach out to those retailers or developers who may not have discovered a respective community yet. The process for attracting businesses must be tempered by reality and cognizant of:

- Paying attention to the geographic base of operations for retailers. Do not expect retailers to deviate significantly from their base of operations to serve a small community;
- Accepting that most retailers have established minimum trade area populations or income thresholds for success based on years of operating experience;
- Understanding that the limited consumer spending in small communities simply cannot

support some retailers offering specialized merchandise assortments;

- Being realistic about how business opportunities in a respective community ranks against other opportunities in front of the retailer; and
- Understanding co-tenancy requirements retailers’ have established as predictors of success.

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

One of the most critical aspects to being proactive and understanding whom to target starts with creating a business case based on some statistical foundation. A statistical business case is typically required to explain the merits of a community. It is important to first establish an understanding of the communities before promoting any specific site option.

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

Table 7-1. Future Allocation of Demand to Year 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)		Bonnyville			
			% Share of Demand	Share of Demand (sf)	Site Coverage Ratio	Net Land Area (acres)
<b>Total</b>	<b>195,297</b>	<b>14.0</b>	<b>100%</b>	<b>195,297</b>	<b>0.32</b>	<b>14.0</b>
East			75%	146,473	0.30	11.2
Central			10%	19,530	0.75	0.6
West			15%	29,295	0.30	2.2

Retail Node	Total 10-yr New Demand by 2031 with INCREASED Market Share (sf / acres)		Bonnyville			
			% Share of Demand	Share of Demand (sf)	Site Coverage Ratio	Net Land Area (acres)
<b>Total</b>	<b>291,977</b>	<b>21.0</b>	<b>100%</b>	<b>291,977</b>	<b>0.32</b>	<b>21.0</b>
East			75%	218,983	0.30	16.8
Central			10%	29,198	0.75	0.9
West			15%	43,797	0.30	3.4

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

### **Retail Development Fundamentals**

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

By way of a checklist, these include:

- Population characteristics of the consumer base;
- The reality that retail follows consumers;
- Consistent and high shopper traffic is a prerequisite for most retailers;
- The consumer base must demonstrate sufficient buying power to be of interest to retailers;
- Chain retailers have a limited number of prototypical store formats that they are willing to operate. Deviating from these established formats is done only as a last resort in circumstances where demand for a location by a retailer or developer is high;
- Most retailers require sites with convenient access, high visibility, and ample parking;
- Most retailers expand in well-defined geographic areas that coincide with their distribution networks and their familiarity with consumer preferences;
- Most retailers have established criteria for site selection. For example, Shoppers Drug Mart typically requires a population of 10,000 people in order to build a 15,000 sf store. Bulk Barn tends to look at local markets of 25,000 people and not

necessarily the trade area. This however typically applies to a local segment for whom regular and frequent patronage is expected, particularly for day-to-day types of convenience goods and services. In a general sense for a more remote or secondary market, this benchmark would apply to a 15-30 minute drive time and would be dependent upon the level of competition in a respective market.

- Clustering of compatible retailers a norm;
- Retailers cannot generally survive rent-to-sales ratios in excess of 15%. Retailers have a threshold level of sales they know they must achieve to be profitable; and
- Retailers attempt to maximize profitability by operating the fewest number of stores possible in any market to avoid sales transference.

### **7.3 Allocation & Opportunities**

The demand figures shown in **Table 7-1** provide guidance for retail growth in Bonnyville over the next 10 years, with an eye to how future development could or should proceed over the longer term and as planning and economic development strategies evolve.

With conservative population increases, combined with marginal increase in overall market share of trade area spending, **Bonnyville could add to its retail inventory by as much as 291,000 sf in specifically targeted categories/business types by 2033.** Combined with a new-to-market larger format retailer(s) this could still leave sufficient demand and opportunities for ancillary retailers.

In retail however, sometimes competition is necessary to ensure that spending is retained in the community and in many cases a new competitor can actually increase the overall spending. **In the case of Bonnyville, the current market share rate of 36% is low and suggests that the market is ripe for increasing its market penetration by adding new-to-market retailers, even if those retailers may have locations in Lloydminster or Cold Lake.**

Since Bonnyville has very limited vacancy, the prospects of new retail are favourable for being drawn predominantly to the East Gate node where other new-to-market brands have recently opened and where land is cleared, serviced and ready to build.

The retail demand forecasts suggest a good opportunity for future retail and there are tenants capable of moving the needle for sales retention and attraction in Bonnyville. **Most notably, these include Walmart, Canadian Tire, Giant Tiger, Dollar Tree, Value Village, JYSK and Bulk Barn, to name a few.**

## 7.4 Target Retail Prospects

With an understanding of the trade area in terms of spending and demographics along with an understanding of the retail market dynamics, specific potential targeted tenants, many of whom would operate a Franchise model have been identified in **Table 7-2** (two pages).

The online survey respondents as well as FBM's network of retailers and broker contacts, sheds some light as to the future compatible businesses for Bonnyville, though there is no guarantee that they will locate with any sense of urgency.

To be successful in attracting these store types or brands it will be necessary to increase the market share of trade area retail spending, and especially the Primary Trade Area.

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

While there is no guarantee, the current retail market is void of a few immediate opportunities for whom land exists (e.g. East Gate) but the marketing message needs to be clear and real in terms of the market opportunity. Persistence is also critical when many brands may not be "ready at this time" for a rural or secondary market, as opposed to a focus on "larger, more urban" markets.

**Table 7-2. Potential Target Retailers for Bonnyville Near Term and Long Term**

(Source: FBM)

<b>Retailer</b>	<b>Merchandise Category Segment</b>	<b>Time Horizon Near Term 2025 to 2030</b>	<b>Time Horizon Long Term 2030 to 2035 +</b>
Princess Auto	Auto Parts & Accessories		✓
Tirecraft	Auto Parts & Accessories	✓	
Canadian Tire	Auto Parts & Accessories	✓	
Brown's Social House	F&B Restaurant - Full Service		✓
Denny's	F&B Restaurant - Full Service		✓
Famoso Pizza	F&B Restaurant - Full Service	✓	
Humpty's	F&B Restaurant - Full Service	✓	
Joey's Only	F&B Restaurant - Full Service	✓	
Montana's BBQ & Bar	F&B Restaurant - Full Service		✓
Moxie's Classic Grill	F&B Restaurant - Full Service		✓
Original Joe's	F&B Restaurant - Full Service	✓	
Real Canadian Brewhouse	F&B Restaurant - Full Service		✓
Red Robin	F&B Restaurant - Full Service		✓
Ricky's All Day Grill	F&B Restaurant - Full Service	✓	
State & Main Kitchen	F&B Restaurant - Full Service		✓
Swiss Chalet	F&B Restaurant - Full Service		✓
Popeye's	F&B Restaurant - Quick Service		✓
Burger King	F&B Restaurant - Quick Service	✓	
Carl's Jr	F&B Restaurant - Quick Service		✓
Cora's	F&B Restaurant - Quick Service		✓
Fatburger	F&B Restaurant - Quick Service	✓	
Five Guys Burger & Fries	F&B Restaurant - Quick Service		✓
Fresh Slice Pizza	F&B Restaurant - Quick Service	✓	
Freshii	F&B Restaurant - Quick Service	✓	
Good Earth Coffee	F&B Restaurant - Quick Service	✓	
Harvey's	F&B Restaurant - Quick Service	✓	
Mucho Burrito	F&B Restaurant - Quick Service	✓	
Oodle Noodle	F&B Restaurant - Quick Service	✓	
Opa	F&B Restaurant - Quick Service	✓	
Second Cup	F&B Restaurant - Quick Service	✓	
Wok Box	F&B Restaurant - Quick Service	✓	
Ardene	Fashion, Footwear & Accessories		✓
Bootlegger	Fashion, Footwear & Accessories		✓
Children's Place	Fashion, Footwear & Accessories		✓
Marshall's	Fashion, Footwear & Accessories		
Old Navy	Fashion, Footwear & Accessories		✓
Penn's (formerly Pennington's)	Fashion, Footwear & Accessories		✓
Reitman's	Fashion, Footwear & Accessories		✓
Ricki's	Fashion, Footwear & Accessories		✓
Winners	Fashion, Footwear & Accessories		
Fit4Less Fitness (by Goodlife)	Fitness & Leisure	✓	
Giant Tiger	General Merchandise	✓	
Dollar Tree	General Merchandise	✓	
Dollarama	General Merchandise	✓	
Goodwill Donation Centre	General Merchandise		✓
Value Village	General Merchandise		✓
Real Canadian Superstore	General Merchandise		
WalMart	General Merchandise	✓	

<b>Retailer</b>	<b>Merchandise Category Segment</b>	<b>Time Horizon Near Term 2025 to 2030</b>	<b>Time Horizon Long Term 2030 to 2035 +</b>
Coop Marketplace	Grocery & Specialty Foods	✓	
Cobs Bread	Grocery & Specialty Foods	✓	
Fresons Bros	Grocery & Specialty Foods		✓
Independent Grocer	Grocery & Specialty Foods		✓
FreshCo	Grocery & Specialty Foods		
Save on Foods	Grocery & Specialty Foods		
M&M Meat Shops	Grocery & Specialty Foods	✓	
Sally's Beauty Supplies	Health & Beauty		
JYSK	Home Furnishings & Décor	✓	
Mattress Mattress	Home Furnishings & Décor	✓	
Sleep Country Canada	Home Furnishings & Décor	✓	
Peavy Mart	Home Improvement & Gardening		✓
Ace Hardware (by Peavey Mart)	Home Improvement & Gardening		
Home Depot	Home Improvement & Gardening		
Castle Building Supplies	Home Improvement & Gardening		
Timber Mart	Home Improvement & Gardening		
First Choice Haircutter	Personal Service		
Great Clips	Personal Service		
IRIS Optometry	Personal Service		
Shoppers Drug Mart	Pharmacy	✓	
Bulk Barn	Specialty Retail	✓	
Great Canadian Dollar Store	Specialty Retail		
Michael's Crafts	Specialty Retail		
Staples	Specialty Retail		
Mills Stationary	Specialty Retail		
EB Games	Toys, Games & Hobbies		

## *Appendix A: Detailed Inventory*

NAICS 2-DIGIT	NAICS GENERAL CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	BROAD MARKET CATEGORY	TENANT NAME	UNIT #	CIVIC STREET #	STREET ADDRESS	NODE	SIZE (SF)	
44-45	Retail trade	Alcohol, Tobacco & Cannabis	RETAIL	1AM Liquor Store	C	5024	50 Avenue	Central	4,935	
44-45	Retail trade	Alcohol, Tobacco & Cannabis	RETAIL	Bonnyville Liquor Mart		4606	50 Avenue	Central	4,314	
44-45	Retail trade	Alcohol, Tobacco & Cannabis	RETAIL	Dollar Store		4608	50 Avenue	Central	0	
44-45	Retail trade	Alcohol, Tobacco & Cannabis	RETAIL	Red Apple Store		4719	50 Avenue	Central	0	
44-45	Retail trade	Alcohol, Tobacco & Cannabis	RETAIL	Sobeys Liquor		4804	50 Avenue	Central	4,596	
44-45	Retail trade	Alcohol, Tobacco & Cannabis	RETAIL	Sonny's Liquor Store		5411	50 Avenue	Central	3,002	
44-45	Retail trade	Alcohol, Tobacco & Cannabis	RETAIL	Sunrise Cannabis Bonnyville	102	4809	50 Avenue	Central	1,446	
		Arts & Entertainment	RETAIL	Dollar Store		4608	50 Avenue	Central	0	
81	Other services (except public administration)	Auto Service	AUTO	Dallaires Diesel Performance Inc.		4911	55 Avenue	Central	5,748	
81	Other services (except public administration)	Auto Service	AUTO	DV Auto & Performance		5309	50 Avenue	Central	4,007	
22	Utilities	Auto Service	AUTO	North East Gas Co-op		5318	51 Avenue	Central	1,640	
81	Other services (except public administration)	Auto Service	AUTO	Westline Autowash	A	5112	50 Avenue	Central	6,212	
		Arts & Entertainment	RETAIL	Red Apple Store		4719	50 Avenue	Central	0	
		Auto Parts & Accessories	RETAIL	Dollar Store		4608	50 Avenue	Central	375	
81	Other services (except public administration)	Auto Parts & Accessories	AUTO	Jiffy Lube		5301	50 Avenue	Central	1,632	
44-45	Retail trade	Auto Parts & Accessories	AUTO	Matchuk Equipment Ltd.		5302	54 Avenue	Central	8,734	
		Auto Parts & Accessories	RETAIL	Red Apple Store		4719	50 Avenue	Central	0	
81	Other services (except public administration)	Auto Parts & Accessories	AUTO	Speedy Glass Bonnyville		5011	51e Avenue	Central	7,372	
23	Construction	Industrial	INDUSTRIAL	ATCO Electric		5402 - 541C	54 Avenue	Central	15,399	
48-49	Transportation and warehousing	Industrial	INDUSTRIAL	Bonnyville Taxi		5427	51 Avenue	Central	1,157	
41	Wholesale trade	Industrial	INDUSTRIAL	EECOL Electric		5022	56 Avenue	Central	8,727	
48-49	Transportation and warehousing	Industrial	INDUSTRIAL	Luciak Charter - Bonnyville Bus Rental		5423	50 Avenue	Central	1,139	
48-49	Transportation and warehousing	Industrial	INDUSTRIAL	Pelican Storage		4915	50 Avenue	Central	535	
31-33	Manufacturing	Industrial	INDUSTRIAL	Graphica Signs		5012	54 Avenue	Central	3,000	
31-33	Manufacturing	Industrial	INDUSTRIAL	SLS Metal Works & Fabricating		5204	54 Avenue	Central	2,243	
71	Arts, entertainment and recreation	Community Service	INSTITUTIONAL	Bonnyville Curling Club		4810	49 Avenue	Central	14,792	
71	Arts, entertainment and recreation	Community Service	INSTITUTIONAL	Bonnyville Swimming Pool		4712	48 Street	Central	13,258	
62	Health care & social assistance	Medical & Wellness Service	MEDICAL WELLNESS	Associate Medical Clinic		4813	49 Avenue	Central	4,601	
62	Health care & social assistance	Medical & Wellness Service	MEDICAL WELLNESS	Bonnyville Healthcare Centre		5001	Lakeshore Drive	Central	78,205	
62	Health care & social assistance	Medical & Wellness Service	MEDICAL WELLNESS	Bonnyville Medical Imaging	103	4716	50 Avenue	Central	2,067	
62	Health care & social assistance	Medical & Wellness Service	MEDICAL WELLNESS	Dragonfly Counselling and Support Centre	A	4808	50 Avenue	Central	3,361	
62	Health care & social assistance	Medical & Wellness Service	MEDICAL WELLNESS	IMPACT Health - Physiotherapy Bonnyville	101	5001	49 Avenue	Central	6,001	
62	Health care & social assistance	Medical & Wellness Service	MEDICAL WELLNESS	Lake Centre Dental Clinic		5029	50 Avenue	Central	3,925	
62	Health care & social assistance	Medical & Wellness Service	MEDICAL WELLNESS	Lakeland Family Eyecare Bonnyville		5201	50 Avenue	Central	5,381	
54	Professional, scientific and technical services	Professional & Financial Service	PROFESSIONAL	Absolute Accounting		5007	51 Avenue	Central	1,132	
52	Finance & insurance	Professional & Financial Service	PROFESSIONAL	ATB Insurance		4902	50 Avenue	Central	2,396	
52	Finance & insurance	Professional & Financial Service	PROFESSIONAL	A-WIN Insurance Ltd.		4915	50 Avenue	Central	475	
81	Other services (except public administration)	Professional & Financial Service	PROFESSIONAL	Bonnyville & District Chamber of Commerce		5014	50 Avenue	Central	825	
56	Administrative and support, waste management and remediation services	Professional & Financial Service	PROFESSIONAL	Bonnyville Registry		4816	51 Avenue	Central	3,124	
54	Professional, scientific and technical services	Professional & Financial Service	PROFESSIONAL	Cashco Financial		5012	50 Avenue	Central	1,754	
52	Finance & insurance	Professional & Financial Service	PROFESSIONAL	Co-operators - Choquet Insurance Group Ltd.		5025	50 Avenue	Central	3,808	
54	Professional, scientific and technical services	Professional & Financial Service	PROFESSIONAL	Dark Horse Media		5109	50 Avenue	Central	851	
52	Finance & insurance	Professional & Financial Service	PROFESSIONAL	Demer's Insurance Ltd.		5206	50 Avenue	Central	2,207	
52	Finance & insurance	Professional & Financial Service	PROFESSIONAL	Edward Jones - Financial Advisor: Robyn Ducharme, CFP	2	4901	50 Avenue	Central	3,120	
53	Real estate and rental and leasing	Professional & Financial Service	PROFESSIONAL	Executive Centre		4716	50 Avenue	Central	1,979	
52	Finance & insurance	Professional & Financial Service	PROFESSIONAL	Greatway Financial	201	5028	50 Avenue	Central	2,030	
54	Professional, scientific and technical services	Professional & Financial Service	PROFESSIONAL	H&R Block		5023	50 Avenue	Central	1,667	
54	Professional, scientific and technical services	Professional & Financial Service	PROFESSIONAL	Kress Law		4816	50 Avenue	Central	889	
52	Finance & insurance	Professional & Financial Service	PROFESSIONAL	Lakeland Credit Union		5016	50 Avenue	Central	18,135	
53	Real estate and rental and leasing	Professional & Financial Service	PROFESSIONAL	Panache Realty		Box 712	5027	50 Avenue	Central	1,888
52	Finance & insurance	Professional & Financial Service	PROFESSIONAL	RBC Royal Bank	102	5028	50 Avenue	Central	2,514	
53	Real estate and rental and leasing	Professional & Financial Service	PROFESSIONAL	REMAX Bonnyville Realty	A	5102	50 Avenue	Central	3,610	
53	Real estate and rental and leasing	Professional & Financial Service	PROFESSIONAL	Royal LePage Northern Lights Realty		4809	50 Avenue	Central	1,322	
52	Finance & insurance	Professional & Financial Service	PROFESSIONAL	Rusnak Financial Ltd.		5105	50 Avenue	Central	1,190	
54	Professional, scientific and technical services	Professional & Financial Service	PROFESSIONAL	Simply Right Accounting Ltd.		5022	51 Avenue	Central	2,088	
52	Finance & insurance	Professional & Financial Service	PROFESSIONAL	Sun Life Financial		4805	50 Avenue	Central	1,401	
54	Professional, scientific and technical services	Professional & Financial Service	PROFESSIONAL	Tay & Company Professional Corporation		5016	51 Avenue	Central	4,500	
52	Finance & insurance	Professional & Financial Service	PROFESSIONAL	TD Canada Trust		4919	50 Avenue	Central	5,335	
53	Real estate and rental and leasing	Professional & Financial Service	PROFESSIONAL	Val Appraisals		4915	50 Avenue	Central	471	
54	Professional, scientific and technical services	Professional & Financial Service	PROFESSIONAL	Vic Rocque Accounting Services Ltd.		5107	50 Avenue	Central	1,424	
54	Professional, scientific and technical services	Professional & Financial Service	PROFESSIONAL	Wood Munday Law		4811	50 Avenue	Central	2,528	

NAICS 2-DIGIT	NAICS GENERAL CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	BROAD MARKET CATEGORY	TENANT NAME	UNIT #	CIVIC STREET #	STREET ADDRESS	NODE	SIZE (SF)
44-45	Retail trade	Auto/RV/Motorsports Dealership	AUTO	54 North Powersports Ltd.		6418	50 Avenue	Central	10,063
		Auto/RV/Motorsports Dealership	RETAIL	Dollar Store		4608	50 Avenue	Central	0
	81 Other services (except public administration)	Auto/RV/Motorsports Dealership	RETAIL	Red Apple Store		4719	50 Avenue	Central	0
	81 Other services (except public administration)	Beauty & Personal Care	RETAIL	Above Salon & Spa	102	5028	50 Avenue	Central	1,306
	81 Other services (except public administration)	Beauty & Personal Care	RETAIL	Accu-Cuts		4915	50 Avenue	Central	458
	81 Other services (except public administration)	Beauty & Personal Care	RETAIL	Alex's Barber Shop		5009	50 Avenue	Central	1,126
	81 Other services (except public administration)	Beauty & Personal Care	RETAIL	All-Nu Massage Therapy	6	5101	50 Avenue	Central	621
	81 Other services (except public administration)	Beauty & Personal Care	RETAIL	Body Revive Wellness Massage & Laser Therapy		2nd floo 4816	51 Avenue	Central	974
	81 Other services (except public administration)	Beauty & Personal Care	RETAIL	Chad's Barbershop	B	4805	50 Avenue	Central	1,152
	81 Other services (except public administration)	Beauty & Personal Care	RETAIL	Coco's Medi Spa & Barbering		4803	50 Avenue	Central	3,032
	81 Other services (except public administration)	Beauty & Personal Care	RETAIL	Country Cottage Nails & Esthetics	4	6111	Range Rd 464	Central	1,269
	81 Other services (except public administration)	Beauty & Personal Care	RETAIL	Dollar Store		4608	50 Avenue	Central	751
	81 Other services (except public administration)	Beauty & Personal Care	RETAIL	Encore Hair	102	4701	50 Avenue	Central	2,686
	81 Other services (except public administration)	Beauty & Personal Care	RETAIL	Evolve Muscle Therapy		5114	51 Avenue	Central	889
	81 Other services (except public administration)	Beauty & Personal Care	RETAIL	Hair Hut		5002	50 Avenue	Central	1,196
	81 Other services (except public administration)	Beauty & Personal Care	RETAIL	In Balance Therapeutic Massage		4816	50 Avenue	Central	1,521
	81 Other services (except public administration)	Beauty & Personal Care	RETAIL	Jagged Hair & Esthetics		5012	50 Avenue	Central	1,372
	81 Other services (except public administration)	Beauty & Personal Care	RETAIL	Red Apple Store		4719	50 Avenue	Central	344
	81 Other services (except public administration)	Beauty & Personal Care	RETAIL	Trendy Creations Beauty Bar	103A	4816	50 Avenue	Central	4,632
	81 Other services (except public administration)	Beauty & Personal Care	RETAIL	Ultra Luxe Massage		4915	50 Avenue	Central	495
51	Information & cultural industries	Books, Media & Video Games	RETAIL	Bonnyville Nouvelle		5304	50 Avenue	Central	4,600
		Books, Media & Video Games	RETAIL	Dollar Store		4608	50 Avenue	Central	375
		Books, Media & Video Games	RETAIL	Red Apple Store		4719	50 Avenue	Central	0
44-45	Retail trade	Fashion & Footwear	RETAIL	A-Ok Shoes & Key Men's Apparel		5115	50 Avenue	Central	4,934
44-45	Retail trade	Fashion & Footwear	RETAIL	Beau Vista Online Boutique		4816	51 Avenue	Central	4,717
44-45	Retail trade	Fashion & Footwear	RETAIL	Bonnyville Bargain Boutique		4814	50 Avenue	Central	4,920
44-45	Retail trade	Fashion & Footwear	RETAIL	Charity Lace - Bonnyville Gift & Clothing Store		5021	50 Avenue	Central	1,844
		Fashion & Footwear	RETAIL	Dollar Store		4608	50 Avenue	Central	375
		Fashion & Footwear	RETAIL	Red Apple Store		4719	50 Avenue	Central	5,504
44-45	Retail trade	Fashion & Footwear	RETAIL	Warehouse One Bonnyville		4806	50 Avenue	Central	3,551
71	Arts, entertainment and recreation	Fitness & Leisure	RETAIL	Hi Energy Fitness Studio and Energy Mma		5313	50 Avenue	Central	2,273
71	Arts, entertainment and recreation	Fitness & Leisure	RETAIL	Wheel Fit Co. Bonnyville	101	4612	50 Avenue	Central	1,895
72	Accommodation & food services	Full Service F&B	RETAIL	Cedar Barn Saloon		5018 - 502C51	50 Avenue	Central	2,286
		Full Service F&B	RETAIL	Dollar Store		4608	50 Avenue	Central	0
72	Accommodation & food services	Full Service F&B	RETAIL	Fire King Kebab		5002	50 Avenue	Central	2,448
72	Accommodation & food services	Full Service F&B	RETAIL	Jennie's Diner & Bakery		5101	51 Street	Central	3,110
72	Accommodation & food services	Full Service F&B	RETAIL	Lakeland Grill		5005	50 Avenue	Central	3,222
72	Accommodation & food services	Full Service F&B	RETAIL	MIR MIKES Steakhouse Casual		5306	50 Avenue	Central	5,415
72	Accommodation & food services	Full Service F&B	RETAIL	Nick's Lounge		5117	50 Avenue	Central	3,888
72	Accommodation & food services	Full Service F&B	RETAIL	Osaka Sushi		5024	51 Avenue	Central	2,792
72	Accommodation & food services	Full Service F&B	RETAIL	Panda Garden		5007	50 Avenue	Central	2,359
		Full Service F&B	RETAIL	Red Apple Store		4719	50 Avenue	Central	0
72	Accommodation & food services	Full Service F&B	RETAIL	The Players Lounge		5426	50 Avenue	Central	6,055
44-45	Retail trade	Grocery, Convenience & Specialty Foods	RETAIL	7-Eleven		4819	50 Avenue	Central	3,386
44-45	Retail trade	Grocery, Convenience & Specialty Foods	RETAIL	Brosseau's Department Store		5001	50 Avenue	Central	6,185
		Grocery, Convenience & Specialty Foods	RETAIL	Dollar Store		4608	50 Avenue	Central	1,876
44-45	Retail trade	Grocery, Convenience & Specialty Foods	RETAIL	Fas Gas Plus - Gas Station		4609	50 Avenue	Central	1,168
44-45	Retail trade	Grocery, Convenience & Specialty Foods	RETAIL	Hamel's Meat Market Ltd.		4818	50 Avenue	Central	2,940
44-45	Retail trade	Grocery, Convenience & Specialty Foods	RETAIL	Red Apple Store		4719	50 Avenue	Central	5,504
44-45	Retail trade	Grocery, Convenience & Specialty Foods	RETAIL	Red Rooster Food Store West		5402	50 Avenue	Central	5,608
44-45	Retail trade	Grocery, Convenience & Specialty Foods	RETAIL	Reddi Mart		4602	50 Avenue	Central	2,983
		Home Electronics & Appliances	RETAIL	Dollar Store		4608	50 Avenue	Central	0
		Home Electronics & Appliances	RETAIL	Red Apple Store		4719	50 Avenue	Central	344
44-45	Retail trade	Home Electronics & Appliances	RETAIL	The Brick (Home Appliances)		5102	50 Avenue	Central	3,637
44-45	Retail trade	Home Electronics & Appliances	RETAIL	The Source	3	5201	50 Avenue	Central	5,344
		Home Furnishings & Décor	RETAIL	Dollar Store		4608	50 Avenue	Central	0
44-45	Retail trade	Home Furnishings & Décor	RETAIL	Furniture Galaxy		4614	50 Avenue	Central	7,961
		Home Furnishings & Décor	RETAIL	Red Apple Store		4719	50 Avenue	Central	344
		Home Furnishings & Décor	RETAIL	The Brick (Home Furniture)		5103	51 Avenue	Central	8,487
23	Construction	Home Furnishings & Décor	RETAIL	Yellowhead Home & Glass Ltd.		5012	54 Avenue	Central	7,750
44-45	Retail trade	Home Improvement & Gardening	RETAIL	All About Home & Lifestylz Ltd.		5108	50 Avenue	Central	8,136
		Home Improvement & Gardening	RETAIL	Dollar Store		4608	50 Avenue	Central	375
23	Construction	Home Improvement & Gardening	RETAIL	Flooring Gallery Ltd.		5302	50 Avenue	Central	4,995
		Home Improvement & Gardening	RETAIL	Red Apple Store		4719	50 Avenue	Central	344
44-45	Retail trade	Home Improvement & Gardening	RETAIL	Vincent Building Supplies		5104	51 Avenue	Central	6,811
		Jewelry	RETAIL	Dollar Store		4608	50 Avenue	Central	375
		Jewelry	RETAIL	Red Apple Store		4719	50 Avenue	Central	344
44-45	Retail trade	Jewelry	RETAIL	Richardson's Jewellery	100	4716	50 Avenue	Central	2,124

NAICS 2-DIGIT	NAICS GENERAL CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	BROAD MARKET CATEGORY	TENANT NAME	UNIT #	CIVIC STREET #	STREET ADDRESS	NODE	SIZE (SF)
72	Accommodation & food services	Limited Service F&B	RETAIL	A&W Canada		5212	50 Avenue	Central	2,680
72	Accommodation & food services	Limited Service F&B	RETAIL	Booster Juice	101	5028	50 Avenue	Central	1,184
72	Accommodation & food services	Limited Service F&B	RETAIL	Burger Baron & Pizza		5326	50 Avenue	Central	1,833
72	Accommodation & food services	Limited Service F&B	RETAIL	Buster's Pizza & Donair		5022	50 Avenue	Central	1,828
72	Accommodation & food services	Limited Service F&B	RETAIL	CAFNS On Main		5003	50 Avenue	Central	2,348
72	Accommodation & food services	Limited Service F&B	RETAIL	Core Juice Co. Ltd.		4816	51 Avenue	Central	3,295
72	Accommodation & food services	Limited Service F&B	RETAIL	Dairy Queen		4710	50 Avenue	Central	2,863
		Limited Service F&B	RETAIL	Dollar Store		4608	50 Avenue	Central	0
72	Accommodation & food services	Limited Service F&B	RETAIL	Domino's Pizza		5028	50 Avenue	Central	1,082
72	Accommodation & food services	Limited Service F&B	RETAIL	Express Pizza Plus		4813	50 Avenue	Central	5,079
72	Accommodation & food services	Limited Service F&B	RETAIL	Paisano's Pizza House		5012	50 Avenue	Central	1,640
		Limited Service F&B	RETAIL	Red Apple Store		4719	50 Avenue	Central	0
72	Accommodation & food services	Limited Service F&B	RETAIL	Subway		4803	50 Avenue	Central	2,888
72	Accommodation & food services	Limited Service F&B	RETAIL	UFO Pizza		5011	50 Avenue	Central	2,907
72	Accommodation & food services	Limited Service F&B	RETAIL	Yums The Word		5021	50 Avenue	Central	4,146
81	Other services (except public administration)	Personal Service	RETAIL	Bonnyville Industrial Dry Cleaning		5012	51 Avenue	Central	5,724
		Personal Service	RETAIL	Dollar Store		4608	50 Avenue	Central	0
		Personal Service	RETAIL	Red Apple Store		4719	50 Avenue	Central	0
81	Other services (except public administration)	Personal Service	RETAIL	ShutterBee Photography		5009	50 Avenue	Central	3,075
81	Other services (except public administration)	Personal Service	RETAIL	Stormy's Dog Grooming		5003	50 Avenue	Central	2,270
81	Other services (except public administration)	Personal Service	RETAIL	The Laundromat		4810	50 Avenue	Central	6,255
		Pharmacy	RETAIL	Dollar Store		4608	50 Avenue	Central	0
44-45	Retail trade	Pharmacy	RETAIL	Pharmasave Clinic Dispensary	102	4610	50 Street	Central	1,500
44-45	Retail trade	Pharmacy	RETAIL	Pharmasave Davey Drug Mart		4812	50 Avenue	Central	5,534
		Pharmacy	RETAIL	Red Apple Store		4719	50 Avenue	Central	0
44-45	Retail trade	Pharmacy	RETAIL	Tellier Guardian Pharmacy		5015	50 Avenue	Central	11,397
54	Professional, scientific and technical services	Professional & Financial Service	PROFESSIONAL	Lakeland Connect	204	4816	51 Avenue	Central	2,508
44-45	Retail trade	Specialty Retail	RETAIL	Bonnyville IMobile Repair Ltd.		4716	50 Avenue	Central	2,269
44-45	Retail trade	Specialty Retail	RETAIL	Buds N Blooms Florist		5027	50 Avenue	Central	2,198
		Specialty Retail	RETAIL	Dollar Store		4608	50 Avenue	Central	2,252
44-45	Retail trade	Specialty Retail	RETAIL	Flowers by Joanne	A	4806	50 Avenue	Central	2,641
44-45	Retail trade	Specialty Retail	RETAIL	Jalsa		5101	50 Avenue	Central	618
44-45	Retail trade	Specialty Retail	RETAIL	Mistik Cakes by Lorna		4606	45 Avenue	Central	1,868
		Specialty Retail	RETAIL	Red Apple Store		4719	50 Avenue	Central	688
44-45	Retail trade	Specialty Retail	RETAIL	Sugar Belle Antiques		5113	50 Avenue	Central	1,059
44-45	Retail trade	Specialty Retail	RETAIL	Tickle Trunk Fun Love Shop		5101	50 Avenue	Central	1,288
		Sporting Goods & Outdoor Recreation	RETAIL	Dollar Store		4608	50 Avenue	Central	375
		Sporting Goods & Outdoor Recreation	RETAIL	Red Apple Store		4719	50 Avenue	Central	344
44-45	Retail trade	Sporting Goods & Outdoor Recreation	RETAIL	Sylvestre Source for Sports		4918	50 Avenue	Central	12,606
		Toys & Hobbies	RETAIL	Dollar Store		4608	50 Avenue	Central	375
44-45	Retail trade	Toys & Hobbies	RETAIL	Panich Music		5024	50 Avenue	Central	2,296
		Toys & Hobbies	RETAIL	Red Apple Store		4719	50 Avenue	Central	0
VACANT	VACANT	VACANT	VACANT	VACANT		5027	50 Avenue	Central	2,307
VACANT	VACANT	VACANT	VACANT	VACANT				Central	3,073
VACANT	VACANT	VACANT	VACANT	Vacant bldg		5104	50 Avenue	Central	1,843
VACANT	VACANT	VACANT	VACANT	Vacant bldg		4807	50 Avenue	Central	1,843
VACANT	VACANT	VACANT	VACANT	Vacant bldg		5010	50 Avenue	Central	3,030
VACANT	VACANT	VACANT	VACANT	Vacant bldg	101	4701	50 Avenue	Central	2,680
81	Other services (except public administration)	Auto Service	AUTO	Westside Muffler & Automotive Ltd.		4439	52 Avenue	East	3,516

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48-49	Transportation and warehousing	Industrial	INDUSTRIAL	Bonnyville Cabs		4703	42 Street	East	1,311
23	Construction	Industrial	INDUSTRIAL	Dr. Reno		4010	45 Avenue	East	3,691
48-49	Transportation and warehousing	Industrial	INDUSTRIAL	Full Recovery Towing Services Inc		3902	41 Avenue	East	2,623
31-33	Manufacturing	Industrial	INDUSTRIAL	Graham Construction		4305	43 Avenue	East	2,250
56	Administrative and support, waste management and remediation services	Industrial	INDUSTRIAL	Lakeland Technology/Operations Support Centre	Bay 2	4437	52 Avenue	East	8,650
23	Construction	Industrial	INDUSTRIAL	Ripin Edge Hydrovac Services		3801	42 Avenue	East	1,500
23	Construction	Industrial	INDUSTRIAL	Trademark Plumbing & Heating Ltd.		4418	54 Avenue	East	4,900
71	Arts, entertainment and recreation	Community Service	INSTITUTIONAL	Bonnyville & District Centennial Centre		4313	50 Avenue	East	142,302
81	Other services (except public administration)	Community Service	INSTITUTIONAL	Northern Lights Funeral Chapel Ltd.		4304	50 Avenue	East	4,855
62	Health care & social assistance	Medical & Wellness Service	MEDICAL WELLNESS	Associate Chiropractic & Wellness Centre	Bay 5	4437	52 Avenue	East	5,278
62	Health care & social assistance	Medical & Wellness Service	MEDICAL WELLNESS	Cedar Chiropractic	6	4428	50 Avenue	East	1,513
54	Professional, scientific and technical services	Professional & Financial Service	PROFESSIONAL	Abacus Safety Consulting for small business		4115	Lakeshore Drive	East	2,326
54	Professional, scientific and technical services	Professional & Financial Service	PROFESSIONAL	Baker Tily	102	4114	50 Avenue	East	4,167
81	Other services (except public administration)	Professional & Financial Service	PROFESSIONAL	Bell Mobility - TNT Digital Systems Bonnyville		4428	50 Avenue	East	1,062
52	Finance & insurance	Professional & Financial Service	PROFESSIONAL	BrokerLink Insurance	2	4428	50 Avenue	East	2,775
52	Finance & insurance	Professional & Financial Service	PROFESSIONAL	Edward Jones - Financial Advisor: Bryan Krawchuk, CFP	102	4114	50 Avenue	East	8,133
56	Administrative and support, waste management and remediation services	Professional & Financial Service	PROFESSIONAL	Holly Steter-Travel Only		3619	Lakeshore Drive	East	2,311
53	Real estate and rental and leasing	Professional & Financial Service	PROFESSIONAL	Squires Court		4510	42 Street	East	5,784
51	Information & cultural industries	Professional & Financial Service	PROFESSIONAL	Telcon		4433	52 Avenue	East	3,885
44-45	Retail trade	Alcohol, Tobacco & Cannabis	RETAIL	Wholesale Club		5101	46 Street	East	0
44-45	Retail trade	Alcohol, Tobacco & Cannabis	RETAIL	ACE Liquor Discounter Bonnyville	N	4903	46 Street	East	3,192
44-45	Retail trade	Alcohol, Tobacco & Cannabis	RETAIL	Deep Discount Liquor Bonnyville #323		4903	46 Street	East	4,488
44-45	Retail trade	Alcohol, Tobacco & Cannabis	RETAIL	NAP Liquor Bonnyville	105	5401	54 Avenue	East	3,671
		Arts & Entertainment	RETAIL	Wholesale Club		5101	46 Street	East	0
81	Other services (except public administration)	Auto Parts & Accessories	AUTO	Tidy Lube		4502	54 Avenue	East	1,363
		Auto Parts & Accessories	RETAIL	Wholesale Club		5101	46 Street	East	0
		Auto/RV/Motorsports Dealership	RETAIL	Wholesale Club		5101	46 Street	East	0
81	Other services (except public administration)	Beauty & Personal Care	RETAIL	Altering Edges Hair Studio		4428	50 Avenue	East	823
81	Other services (except public administration)	Beauty & Personal Care	RETAIL	Knot To Knead Massage Therapy		4006	41a Street	East	2,221
81	Other services (except public administration)	Beauty & Personal Care	RETAIL	Pure Dazzle Hair Studio		3702	Beau Vista Blvd	East	2,493
		Beauty & Personal Care	RETAIL	Wholesale Club		5101	46 Street	East	2,579
		Books, Media & Video Games	RETAIL	Wholesale Club		5101	46 Street	East	258
44-45	Retail trade	Fashion & Footwear	RETAIL	Freckleface Creations		3705	43 Avenue	East	2,432
44-45	Retail trade	Fashion & Footwear	RETAIL	Mark's	5	4428	50 Avenue	East	10,453
		Fashion & Footwear	RETAIL	Wholesale Club		5101	46 Street	East	3,611
71	Arts, entertainment and recreation	Fitness & Leisure	RETAIL	Ashlin Gymnastics Club		3904	50 Avenue	East	5,044
72	Accommodation & food services	Full Service F&B	RETAIL	The Lobby Bar + Lounge		5409	Lakeland Road	East	14,627
		Full Service F&B	RETAIL	Wholesale Club		5101	46 Street	East	0
44-45	Retail trade	Grocery, Convenience & Specialty Foods	RETAIL	7-Eleven		3702	50 Avenue	East	3,162
41	Wholesale trade	Grocery, Convenience & Specialty Foods	RETAIL	Fine Goods Imports		4428	50 Avenue	East	1,744
44-45	Retail trade	Grocery, Convenience & Specialty Foods	RETAIL	Sobeys		4501	50 Avenue	East	31,850
44-45	Retail trade	Grocery, Convenience & Specialty Foods	RETAIL	Waypoint Convenience		5101	46 Street	East	2,608
		Grocery, Convenience & Specialty Foods	RETAIL	Wholesale Club		5101	46 Street	East	36,105
51	Information & cultural industries	Home Electronics & Appliances	RETAIL	Tom Harris TELUS & Koodo Store	4	4428	50 Avenue	East	2,466
		Home Electronics & Appliances	RETAIL	Wholesale Club		5101	46 Street	East	1,032
44-45	Retail trade	Home Improvement & Gardening	RETAIL	Lakeland Co-op Home Centre		5411	Eastpointe Way	East	26,083
44-45	Retail trade	Home Furnishings & Décor	RETAIL	Pro Office Equipment		4520	41A Street	East	2,194
		Home Furnishings & Décor	RETAIL	Wholesale Club		5101	46 Street	East	1,547
44-45	Retail trade	Home Improvement & Gardening	RETAIL	Bonnyville Home Hardware		4428	50 Avenue	East	17,901
		Home Improvement & Gardening	RETAIL	Wholesale Club		5101	46 Street	East	1,547
		Jewelry	RETAIL	Wholesale Club		5101	46 Street	East	258

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72	Accommodation & food services	Limited Service F&B	RETAIL	Boston Pizza		5406	Eastpointe Way	East	6,399
72	Accommodation & food services	Limited Service F&B	RETAIL	Gouda and Brie Charcuterie		3710	Beau Vista Blvd	East	1,888
72	Accommodation & food services	Limited Service F&B	RETAIL	KFC		5601	50 Avenue	East	2,490
72	Accommodation & food services	Limited Service F&B	RETAIL	Little Caesars Pizza	104	5401	43 Street	East	2,158
72	Accommodation & food services	Limited Service F&B	RETAIL	Mary Brown's Chicken	103	5401	43 Street	East	2,440
72	Accommodation & food services	Limited Service F&B	RETAIL	McDonald's		5402	Eastpointe Way	East	5,503
72	Accommodation & food services	Limited Service F&B	RETAIL	Pita Pit		4428	50 Avenue	East	866
72	Accommodation & food services	Limited Service F&B	RETAIL	The Duke of Wellington - Food Services		4402	54 Avenue	East	6,833
72	Accommodation & food services	Limited Service F&B	RETAIL	Tim Hortons	102	5401	43 Street	East	3,116
72	Accommodation & food services	Limited Service F&B	RETAIL	Wanderlust		4406	38 Street	East	3,955
		Limited Service F&B	RETAIL	Wholesale Club		5101	46 Street	East	0
81	Other services (except public administration)	Personal Service	RETAIL	Dawn Wickhorst Photography	N	4116	40 Street	East	2,476
81	Other services (except public administration)	Personal Service	RETAIL	Katie's K9 Klips		3729	44 Avenue	East	2,852
		Personal Service	RETAIL	Wholesale Club		5101	46 Street	East	0
		Pharmacy	RETAIL	Wholesale Club		5101	46 Street	East	0
44-45	Retail trade	Specialty Retail	RETAIL	Pet Valu		4905	46 Street	East	1,540
		Specialty Retail	RETAIL	Wholesale Club		5101	46 Street	East	3,611
		Sporting Goods & Outdoor Recreation	RETAIL	Wholesale Club		5101	46 Street	East	516
		Toys & Hobbies	RETAIL	Wholesale Club		5101	46 Street	East	516
VACANT	VACANT	VACANT	VACANT	VACANT		4428	50 Avenue	East	759
VACANT	VACANT	VACANT	VACANT	Vacant bldg		4310	50 Avenue	East	4,467
81	Other services (except public administration)	Auto Service	AUTO	B's Auto		5714	52 Avenue	West	7,515
81	Other services (except public administration)	Auto Service	AUTO	Gateway Truck & RV Wash		4701	70 Street	West	27,020
81	Other services (except public administration)	Auto Service	AUTO	GOOSE Maintenance		5809	54 Avenue	West	8,849
81	Other services (except public administration)	Auto Service	AUTO	Jansen Auto Service & Detailing Ltd.		5515	50 Avenue	West	3,249
81	Other services (except public administration)	Auto Service	AUTO	JED RV Solutions		5213	60 Street	West	10,652
81	Other services (except public administration)	Auto Service	AUTO	Sick Cycles Inc.		6218	49 Avenue	West	2,336
81	Other services (except public administration)	Auto Service	AUTO	Truck Zone		6024	52 Avenue	West	9,776
21	Mining, quarrying, and oil and gas extraction	Industrial	INDUSTRIAL	AltaGas Ltd.		6224	52 Avenue	West	15,938
48-49	Transportation and warehousing	Industrial	INDUSTRIAL	B&R Eckel's Transport Ltd.		5520	50 Avenue	West	8,304
48-49	Transportation and warehousing	Industrial	INDUSTRIAL	Big Time Towing & Recovery Ltd.		5812	56 Avenue	West	5,285
23	Construction	Industrial	INDUSTRIAL	Boon Energy Services		5214	55 Street	West	10,081
22	Utilities	Industrial	INDUSTRIAL	Culligan Water Bonnyville		6021	50 Avenue	West	4,084
41	Wholesale trade	Industrial	INDUSTRIAL	ENZeeTech Inc.	101	6217	50 Avenue	West	7,821
48-49	Transportation and warehousing	Industrial	INDUSTRIAL	Grimshaw Trucking L P	102	5803	50 Avenue	West	11,313
31-33	Manufacturing	Industrial	INDUSTRIAL	Hamels Meat Market (Processing Plant)		6002	50 Avenue	West	7,176
81	Other services (except public administration)	Industrial	INDUSTRIAL	Heavy Metal Truck & Equipment Wash		6202	52 Avenue	West	5,152
53	Real estate and rental and leasing	Industrial	INDUSTRIAL	Herc Rentals	103	7301	50 Avenue	West	12,386
31-33	Manufacturing	Industrial	INDUSTRIAL	Kotowich Chimney and Installations Ltd.		5504	50 Avenue	West	5,213
31-33	Manufacturing	Industrial	INDUSTRIAL	Lakeland Arctic Spas & Purified Water Shoppe	103	5709	50 Avenue	West	5,311
23	Construction	Industrial	INDUSTRIAL	Lauden Mechanical Innovation		5802	50 Avenue	West	19,984
54	Professional, scientific and technical services	Industrial	INDUSTRIAL	Mister Stitch Embroidery & Ad Specialties		6401	50 Avenue	West	6,148
23	Construction	Industrial	INDUSTRIAL	Northern Industrial Insulation Contractors Inc.		5506	50 Avenue	West	1,428
81	Other services (except public administration)	Industrial	INDUSTRIAL	Overdrive Heavy-Duty Services Ltd.		4700	70 Street	West	25,473
31-33	Manufacturing	Industrial	INDUSTRIAL	PCM Artificial Lift Stations		5609	52 Avenue	West	6,611
56	Administrative and support, waste management and remediation services	Industrial	INDUSTRIAL	Precision Protection Systems Ltd.	Bay 4	5506	50 Avenue	West	1,270
54	Professional, scientific and technical services	Industrial	INDUSTRIAL	PTW Energy Services		5718	54 Avenue	West	9,923
31-33	Manufacturing	Industrial	INDUSTRIAL	Sign Solutions		5212	55 Street	West	3,040
41	Wholesale trade	Industrial	INDUSTRIAL	Source Industrial Bonnyville		6411	52 Avenue	West	6,051
41	Wholesale trade	Industrial	INDUSTRIAL	Superior Safety Ltd.		6025	50 Avenue	West	3,998
41	Wholesale trade	Industrial	INDUSTRIAL	Swift Oilfield Supply		6015	50 Avenue	West	5,861
41	Wholesale trade	Industrial	INDUSTRIAL	True Canadian Energy		5609	52 Avenue	West	14,947
41	Wholesale trade	Industrial	INDUSTRIAL	Tuboscope Canada		7401	50 Avenue	West	20,170
48-49	Transportation and warehousing	Industrial	INDUSTRIAL	U-Haul Neighbourhood Dealer		6219	52 Avenue	West	4,191
81	Other services (except public administration)	Industrial	INDUSTRIAL	Warco Industrial		5709	52 Avenue	West	14,224
22	Utilities	Industrial	INDUSTRIAL	Weatherford BMW Canada Partnership		5520	50 Avenue	West	26,787
71	Arts, entertainment and recreation	Community Service	INSTITUTIONAL	Bonnyville Pro Rodeo		4201	55 Street	West	5,098
11	Agriculture, forestry, fishing and hunting	Community Service	INSTITUTIONAL	Lakeland Co-op Agro Centre		6020	54 Avenue	West	4,528

NAICS 2-DIGIT	NAICS GENERAL CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	BROAD MARKET CATEGORY	TENANT NAME	UNIT #	CIVIC STREET #	STREET ADDRESS	NODE	SIZE (SF)
62	Health care & social assistance	Medical & Wellness Service	MEDICAL WELLNESS	Lakeland Health Care		6217	50 Avenue	West	1,595
62	Health care & social assistance	Medical & Wellness Service	MEDICAL WELLNESS	Lakeland Respiratory Bonnyville		5506	50 Avenue	West	2,083
54	Professional, scientific and technical services	Professional & Financial Service	PROFESSIONAL	Thinkwerx Creative Co.		6404	50 Avenue	West	6,181
54	Professional, scientific and technical services	Professional & Financial Service	PROFESSIONAL	Bookkeeping Essentials Ltd.	4	5506	50 Avenue	West	1,361
54	Professional, scientific and technical services	Professional & Financial Service	PROFESSIONAL	Magnolia Veterinary Services		4405	68 Street NW	West	6,289
54	Professional, scientific and technical services	Professional & Financial Service	PROFESSIONAL	Wood	Bay 1	5506	50 Avenue	West	1,400
44-45	Retail trade	Alcohol, Tobacco & Cannabis	RETAIL	Buffalo Trail Liquor Store Ltd.	101	6608	50 Avenue	West	1,500
44-45	Retail trade	Alcohol, Tobacco & Cannabis	RETAIL	Canna Cabana	3	5506	50 Avenue	West	3,159
44-45	Retail trade	Alcohol, Tobacco & Cannabis	RETAIL	SpiritLeaf Bonnyville		6608	50 Avenue	West	3,682
44-45	Retail trade	Alcohol, Tobacco & Cannabis	RETAIL	The Lighthouse Specialty Smoke Shop	101	5709	50 Avenue	West	700
44-45	Retail trade	Alcohol, Tobacco & Cannabis	RETAIL	Vape and Smoke Shop Bonnyville		5504	50 Avenue	West	2,427
44-45	Retail trade	Auto Parts & Accessories	AUTO	Bumper to Bumper - Auto Parts		5502	52 Avenue	West	5,006
44-45	Retail trade	Auto Parts & Accessories	AUTO	Fountain Tire		6012	50 Avenue	West	13,317
44-45	Retail trade	Auto Parts & Accessories	AUTO	Kal Tire		6001	52 Avenue	West	11,894
44-45	Retail trade	Auto Parts & Accessories	AUTO	NAPA Auto Parts / Traction - Northern Truck and Industrial Supplies Ltd.	C	6201	50 Avenue	West	20,719
44-45	Retail trade	Auto/RV/Motorsports Dealership	AUTO	Bonnyville Dodge Chrysler Jeep Ram		5605	50 Avenue	West	8,676
44-45	Retail trade	Auto/RV/Motorsports Dealership	AUTO	Ducharme Motors		5714	50 Avenue	West	21,966
44-45	Retail trade	Auto/RV/Motorsports Dealership	AUTO	Motion Motor Sports		5009	62 Street	West	4,049
44-45	Retail trade	Auto/RV/Motorsports Dealership	AUTO	Pioneer Offroad Rentals		5615	50 Avenue	West	6,442
44-45	Retail trade	Auto/RV/Motorsports Dealership	AUTO	Tercier Motors Ltd.		6413	50 Avenue	West	21,855
72	Accommodation & food services	Full Service F&B	RETAIL	Fifty 11 Kitchen & Pub		5011	66 Street	West	17,550
72	Accommodation & food services	Full Service F&B	RETAIL	Happy Valley Restaurant		6026	50 Avenue	West	4,579
72	Accommodation & food services	Full Service F&B	RETAIL	The Chopped Leaf	103	6608	50 Avenue	West	3,068
72	Accommodation & food services	Full Service F&B	RETAIL	The Crown & Derby Pub		5011	66 Street	West	9,684
44-45	Retail trade	Grocery, Convenience & Specialty Foods	RETAIL	Bonnyville Shell - Buffalo Trail Fuel & Convenience Ltd.	102	6608	50 Avenue	West	2,828
44-45	Retail trade	Grocery, Convenience & Specialty Foods	RETAIL	Esso		5713	50 Avenue	West	5,690
44-45	Retail trade	Grocery, Convenience & Specialty Foods	RETAIL	Lakeland Co-op Bonnyville Gas Bar		6020	54 Avenue	West	3,993
44-45	Retail trade	Grocery, Convenience & Specialty Foods	RETAIL	My Hometown Market	A	5210	55 Street	West	7,346
44-45	Retail trade	Home Improvement & Gardening	RETAIL	Lakeland Fine Floors	102	5709	50 Avenue	West	2,846
11	Agriculture, forestry, fishing and hunting	Home Improvement & Gardening	RETAIL	Ranchman's Farm & Feed Store		5705	50 Avenue	West	4,846
72	Accommodation & food services	Limited Service F&B	RETAIL	Tim Hortons		6602	50 Avenue	West	2,909
VACANT	VACANT	VACANT	VACANT	Vacant bldg		5603	51 Avenue	West	2,160
VACANT	VACANT	VACANT	VACANT	Vacant bldg		5603	51 Avenue	West	6,254

## Survey Questions



### Town of Bonnyville Commercial Gap Analysis Community Survey

Thank you for your interest in this survey about the Town of Bonnyville, Alberta. This Commercial Gap Analysis survey should take approximately 5-10 minutes to complete and is open until Oct 23rd 2023.

Your responses are very valuable to the Town and will inform the Town's business recruitment, retention and economic development strategy for the community. Your input will help identify the shops and services that you would like to see here.

The results of the survey will be presented in summarized format in the final report. Any identifying information you submit through this form will be kept confidential.

**Where do you live? \***

- Town of Bonnyville
- Municipal District (MD) of Bonnyville
- City of Cold Lake
- Other

If you are a resident of the Town of Bonnyville, please complete the survey below. If you are not a Town resident, please complete the non-resident survey on the last page.

## Town of Bonnyville Resident Survey

Residents who complete the this survey have the chance to win a \$100 gift card for Mr. Mike's Bonnyville. Please fill in the information at the end of this survey if you would like to participate.

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

- a. Town of Bonnyville
- b. Cold Lake
- c. Lac La Biche
- d. Vegreville
- e. Lloydminster
- Other

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

- a. Town of Bonnyville
- b. Cold Lake
- c. St. Paul
- d. Lac La Biche
- e. Vegreville
- f. Lloydminster
- g. Edmonton
- h. Online
- Other

### When thinking about your average annual household spending, what percentage (%) of your spending occurs inside Bonnyville, outside Bonnyville or online?

	Inside the Town of Bonnyville	Outside the Town of Bonnyville	Online
Grocery, Pharmacy & Alcohol			
Personal Care & Services			
Fashion & Accessories			
Home Improvement & Decor			
Home & Personal Electronics			
Sporting Goods, Books & Hobbies			
Sit Down Restaurants & Pubs			
Quick Service Restaurants			

The total for each row should equal 100% (For example: 50% of your household spending is in the Town of Bonnyville, 40% is outside of the Town of Bonnyville, and 10% is online for a total of 100%)

**What are your primary reasons for visiting or using shops & services in the Town of Bonnyville?**

- 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
- Other

**What are your primary reasons for NOT using the Town of Bonnyville's shops and 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
- Other

**What shops or services are missing in the Town of Bonnyville?**

- Grocery, Pharmacy & Alcohol
- Personal Care & Services
- Fashion & Accessories
- Home Improvement & Decor
- Home & Personal Electronics
- Sporting Goods, Books & Hobbies
- Fitness & Entertainment
- Sit Down Restaurants & Pubs
- Quick Service Restaurants
- Other

**What is your age?**

- a) 15 to 24 years
- b) 25 - 34 years
- c) 35 - 44 years
- d) 45 - 54 years
- e) 55 - 64 years
- f) 65 - 74 years
- g) 75 years and over
- h) Prefer not to say

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

**Do you have any other comments?**

Please submit this completed survey to Bonnyville Town Hall at 4917 49th Ave Bonnyville, Alberta by Oct 23rd 2023

## **Town of Bonnyville Commercial Gap Analysis - Gift Card Draw**

Thank you for completing the survey! If you are a resident of the Town of Bonnyville, please fill in the form below to be entered to win a draw for a \$100 gift card to Mr. Mike's Bonnyville.

**Would you like to be entered to win a \$100 gift card to Mr. Mike's restaurant? \***

YES

NO

**If yes, what is your name?**

First Name

Last Name

**If yes, what is your phone number?**

Area Code

Phone Number

**If yes, what is your email?**

example@example.com

Please submit this completed survey to Bonnyville Town Hall at 4917 49th Ave Bonnyville, Alberta by Oct 23rd 2023

# Non-resident Survey

How often do you use shops or services in the Town of Bonnyville?

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

What are your primary reasons for visiting or using shops & services in the Town of Bonnyville?

- 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
- Other

What are your primary reasons for NOT using the Town of Bonnyville's shops and 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
- Other

What is your age?

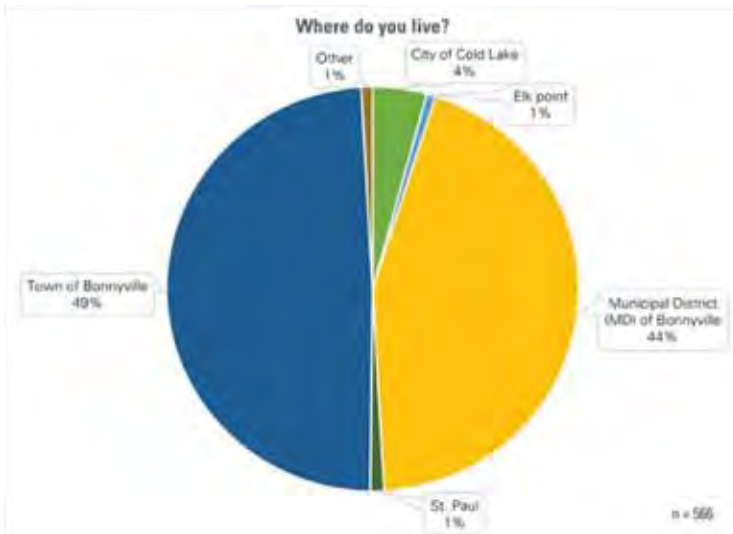
- a) 15 to 24 years
- b) 25 - 34 years
- c) 35 - 44 years
- d) 45 - 54 years
- e) 55 - 64 years
- f) 65 - 74 years
- g) 75 years and over
- h) Prefer not to say

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

Do you have any other comments?

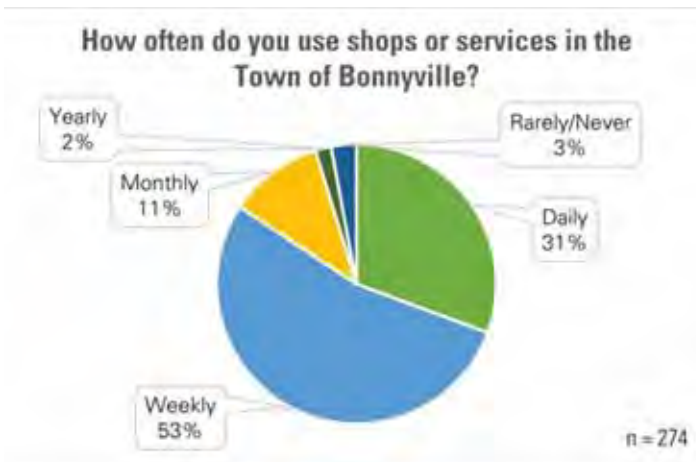
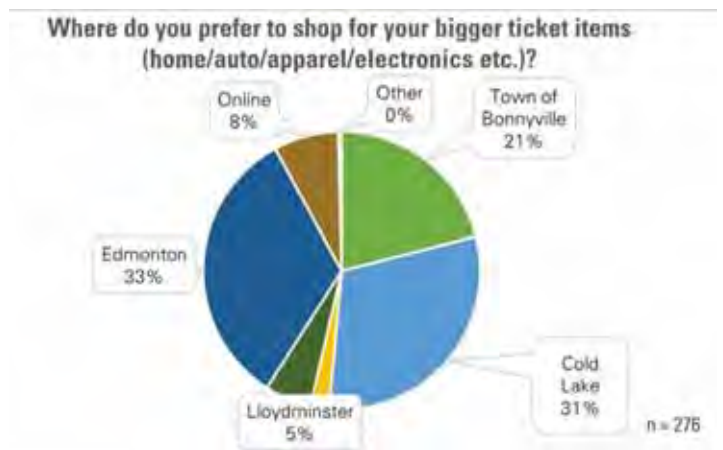
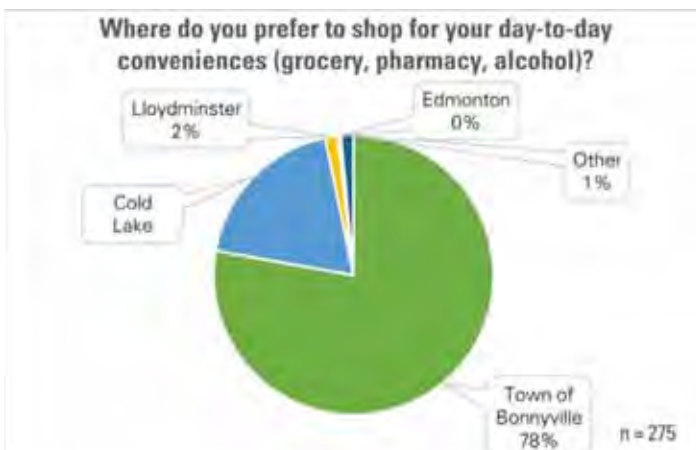
Please submit this completed survey to Bonnyville Town Hall at 4917 49th Ave Bonnyville, Alberta by Oct 23rd 2023

# Survey Results



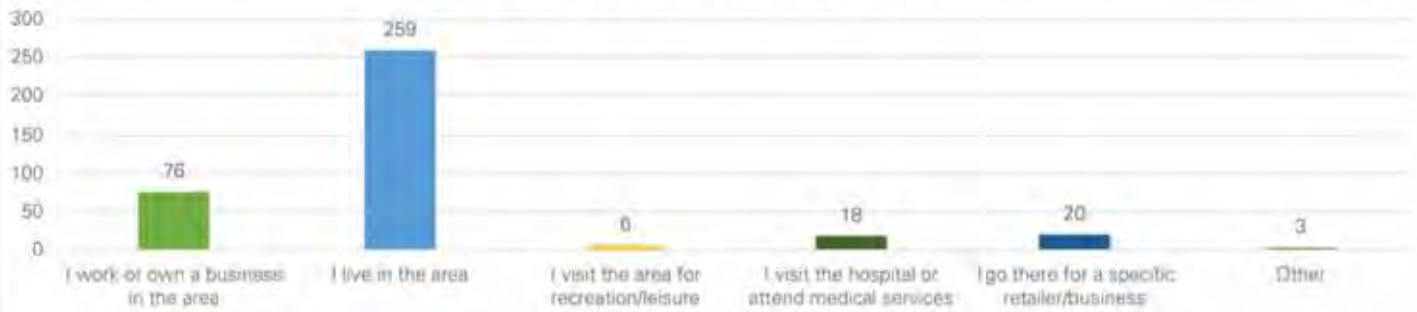
## Resident Survey (n = 277)

A total of 214 (77%) of respondents entered to win a gift card to Mr. Mike’s restaurant at the end of the survey.



### What are your primary reasons for visiting or using shops & services in the Town of Bonnyville? Select all that apply

n = 267



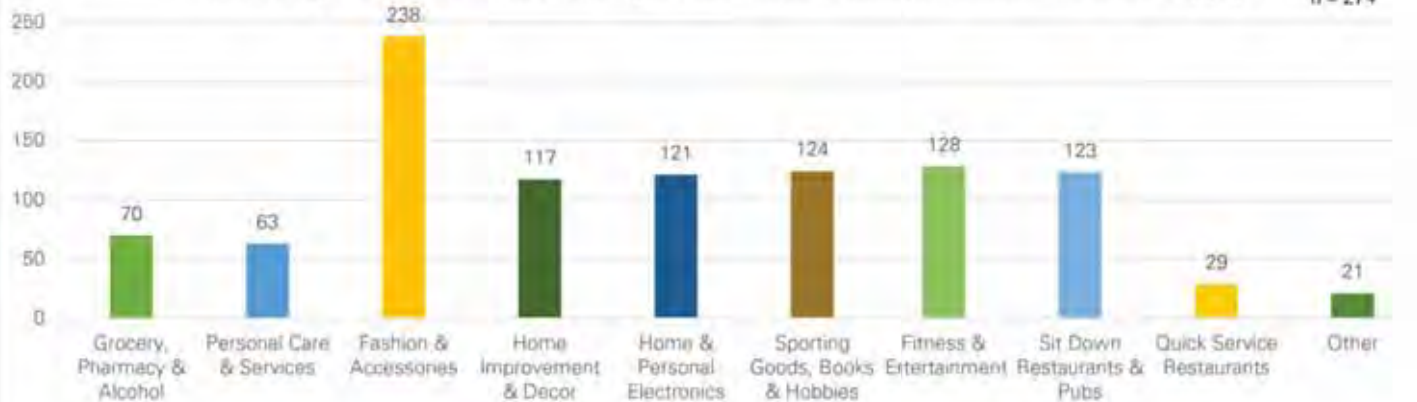
### What are your primary reasons for NOT using the Town of Bonnyville's shops and services, if any? Select all that apply

n = 274



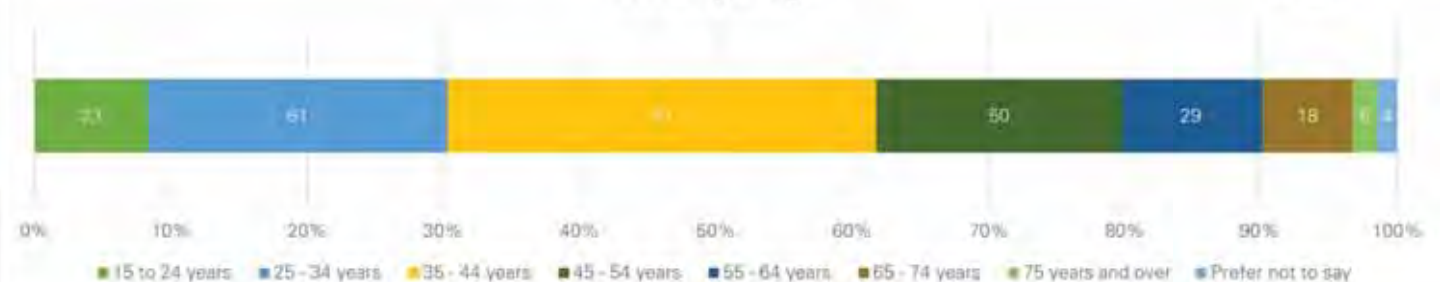
### What shops or services are missing in the Town of Bonnyville? Select all that apply

n = 274

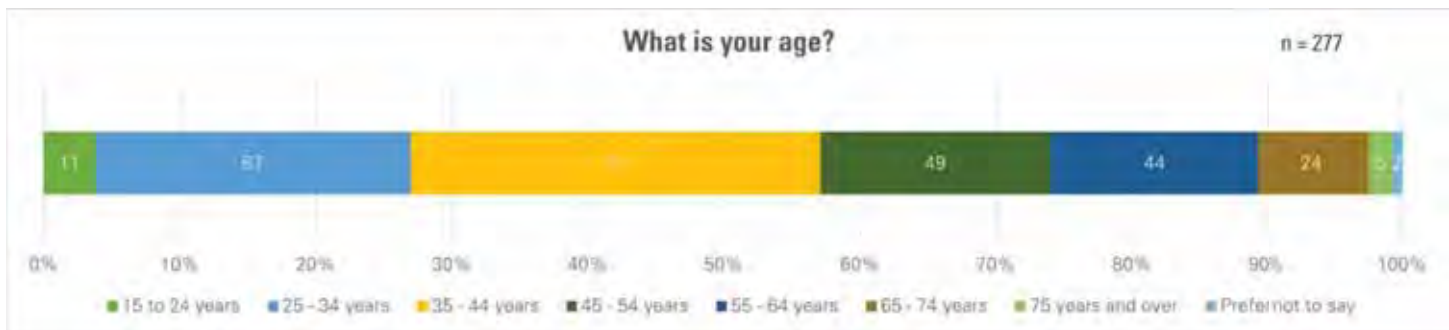
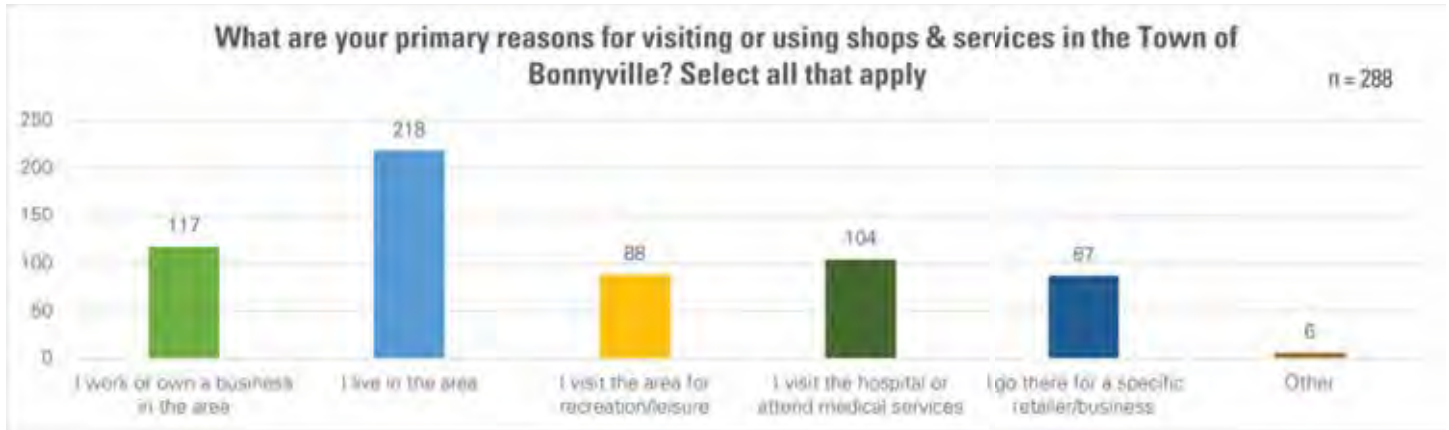


### What is your age?

n = 277



**Non-resident Survey (n = 289)**



FBM



*Town of Bonnyville*  
*"It's Multi-Natural"*