

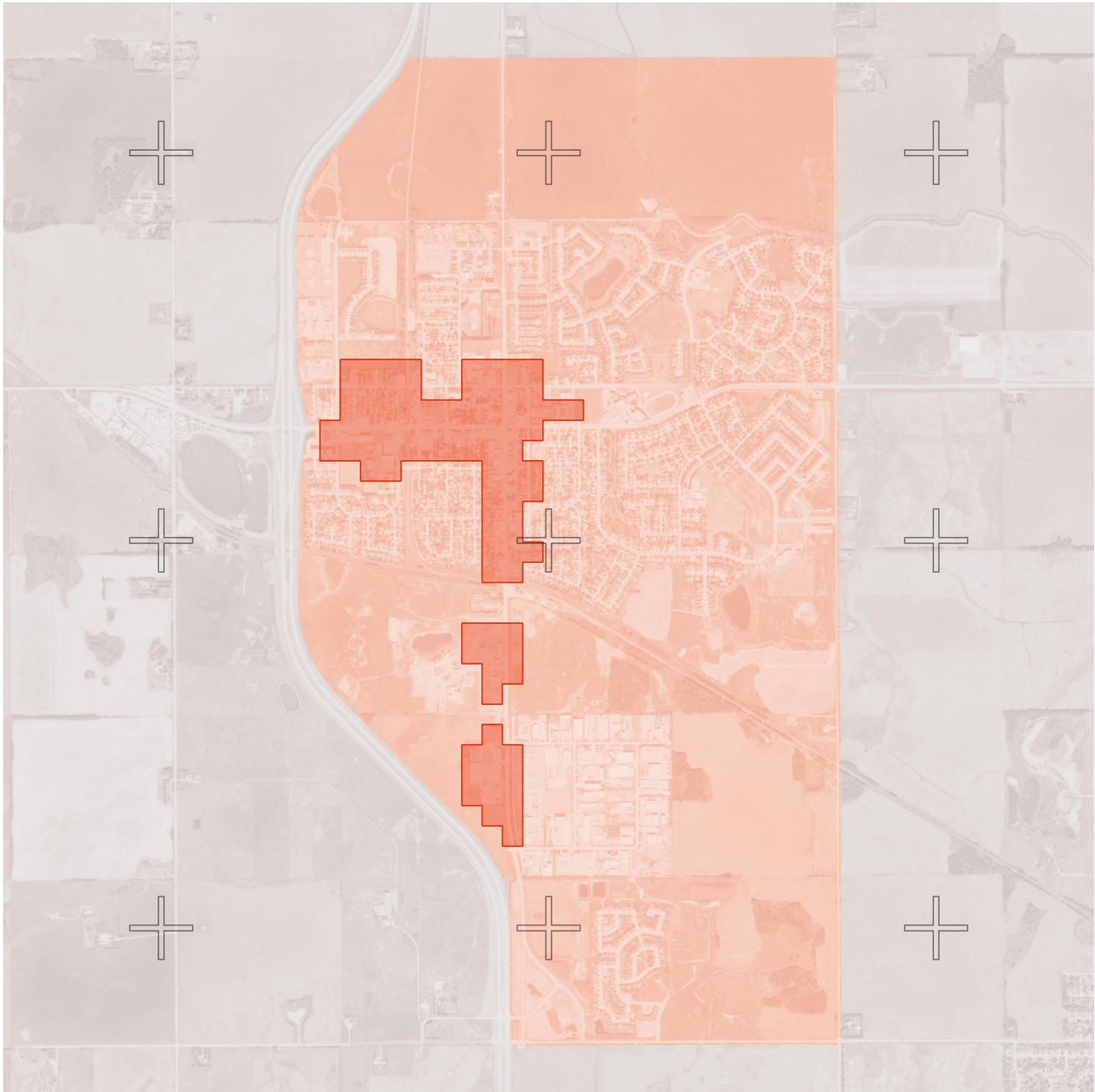
Town of Morinville Retail Gap and Complementary Sectors Analysis



SUBMITTED BY
Fowler Bauld & Mitchell Ltd.

IN COLLABORATION WITH
Goodeve & Associates

November 2024





Land Acknowledgment

The Town of Morinville is located within Treaty 6 territory and the homeland of the Métis. We acknowledge and respect the histories, languages, and diverse cultures of the First Nations, Métis, and Inuit and are grateful for their contributions that continue to enrich our communities.



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Preface

FBM Planning Ltd. ("FBM"), in collaboration with Goodeve and Associates ("Goodeve"), was commissioned by the Town of Morinville to conduct a Retail Gap and Complementary Sectors Analysis for the Town.

The objective of this study, which was carried out in 2024, 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 Morinville to identify investment and business attraction opportunities in support of its continuing development and prosperity. In addition, we have undertaken a complementary sectors analysis to help Morinville identify, based on existing infrastructure and businesses, likely opportunities for development.

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. We also adopt the North American Industry Classification System (NAICS) designations.

Any references to specific retailers do not represent a guarantee that they will locate in Morinville, 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 Morinville or FBM.

Glossary of Terms

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 lease-line.

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

Figure P-1. Retail Merchandise Category Sorting Breakdown



List of abbreviations

- \$ psf – dollars per square foot (an industry standard measure of annualized retail sales productivity)
- AADT – Annual average daily traffic
- ASP – Area Structure Plan
- EDAP – Economic Development Action Plan
- EMRB – Edmonton Metropolitan Region Board
- EMRGP – Edmonton Metropolitan Region Growth Plan
- ICSC – International Council of Shopping Centres
- MDP – Municipal Development Plan
- MSP – Municipal Sustainability Plan
- psf – per square foot
- sf – square feet
- TMP – Transportation Master Plan

Executive Summary

Introduction

Morinville occupies a strategic location along Highway 2 at the centre of a retail trade area estimated at around 20,000 residents, exerting considerable regional influence and drawing spending from several smaller communities as well as Sturgeon County. Morinville is projected to grow steadily over the coming decades. The existing retail inventory consists of both main-street style shopping along 100 Ave. and 100 St. and newer offerings in the southern portion of the municipality. The retail floor area is lower than expected for a municipality of this size, probably reflecting the strong competitive influence of retail in nearby St. Albert. With room for growth, Morinville could capture a greater share of trade area spending in years to come. With increasing consumer demand, relatively affordable housing, and a supportive community framework, Morinville is well-positioned for sustained retail growth, making it an attractive destination for retailers and investors alike.

Population Summary

Morinville's population has grown steadily over the past decade, from 9,375 (2013) to 10,775 (2023). According to the Edmonton Metropolitan Region Growth Plan, by 2044, Morinville's population is projected to grow to between 15,200 (low estimate) and 17,900 (high estimate). The municipality's estimated retail trade area is influenced particularly by a combination of drive times and strong competitive forces, such as proximity to St. Albert. The population of the trade area is estimated to be 19,343, drawing from nearby settlements such as Cardiff, Legal and Alexander First Nation in addition to a wide area of rural Sturgeon County. The Town of Morinville is projected to grow by 1.21% annually over the next five years, while slower projected growth outside the municipality means the trade area as a whole is projected to grow by 0.79% annually over the same period.

Spending Summary

Total aggregate retail spending for Morinville's retail trade area (including the Town of Morinville) for 2024 is estimated to be \$357.9 million, excluding health care and automotive goods. Including health care and auto segments, total spending is estimated at \$507.5 million.

Grocery, Convenience, and Specialty foods represent the highest household spending category at \$13,889, followed closely by Auto/RV/Motorsports sales at \$12,779.

Among the four major aggregated merchandise segments, Grocery and Convenience accounts for 40% of the total non-automotive spending potential, while Comparison Merchandise accounts for 42%.

The trade area's retail-specific spending (e.g. excluding health care and auto) is expected to increase to \$398.5 million by 2029 and \$442.2 million by 2034, representing a 11% total increase in spending over each of the five-year periods (2024–2029, 2029–2034).

In addition to regular resident trade area spending, total miscellaneous inflow spending for 2024 is estimated at \$4.9 million, accounting for a small but nonetheless noteworthy percentage (1.5%) of overall trade area spending. This is expected to increase to \$5.5 million by 2029 and \$6.1 million by 2034.

Inventory Summary

The Town of Morinville's retail inventory has been grouped into three commercial nodes:

- Retail district 1: 100 Avenue
- Retail district 2: 100 Street (north of railway)
- Retail district 3: Southern area (south of railway)

The top retail categories in Morinville (excluding professional and financial services and auto) in terms of overall retail floor area are:

1. Grocery, Convenience and Specialty Foods (75,799 sf)
2. Home Improvement and Gardening (34,735 sf)
3. Limited-service F&B (34,111 sf)
4. Full-service F&B (29,418 sf)
5. Alcohol, Tobacco and Cannabis (25,048 sf)

In relative terms, the provision of Alcohol, Tobacco and Cannabis is quite high, while categories such as Home Furnishings and Decor, Sporting Goods, and Toys have a much lower representation even if some of these goods are offered in limited volume at dollar stores.

Morinville has a mix of 69% local independent businesses to 31% branded franchise or chain businesses in terms of the overall store count, and 51% local to 49% branded in terms of floorspace.

The current overall vacancy rate is estimated at 6.5%, or 30,613 sf, which is comprised of 15 individual units. The average vacancy size is just over 2,000 sf. The vacancy rate is slightly above that normally considered indicative of a healthy retail environment with opportunity to support new demand for retail space (4-5%), but given the nature of some older vacancies, the reality is that the vacancy level is manageable and supportive of infill opportunities.

The estimated retail space per capita ratio for the Morinville trade area is in the range of 14.2 sf/capita if excluding non-retail street front space and not accounting for other limited retail in the trade area. Morinville should be striving for a reasonable and realistic 20 sf/capita. For example, a trade area of 20,000 residents supporting a per capita ratio of 20 sf would result in a total supportable inventory of 400,000 sf or approximately 110,000 sf more than exists today (for retail-specific categories).

It is conceivable that new demand would be most desirable in the southern portion of Morinville, reflecting current growth patterns. Strategic infill development opportunities on 100 Avenue and 100 Street as well as existing vacancies could also absorb some of the estimated residual demand.

The **100 Avenue retail node** is Morinville's traditional commercial centre, home to approximately 176,022 sf of retail space. It has a vacancy rate of 8.1%. Top retail categories (excluding professional and financial services and auto) are Full-service F&B, Limited-service F&B, and Personal Services. The area has a healthy retail mix catering well to local trade area demographics.

The **100 Street retail node** is the concentration of retail and services along Morinville's principal north-south axis, amounting to around 166,023 sf of retail space. This cluster has a vacancy rate of 7.8%. The top retail categories are Grocery, Convenience, and Specialty Foods; Home Improvement and Gardening; and Alcohol, Tobacco and Cannabis.

The **southern retail node** is located along 100 St. south of the railway tracks, and has around 128,327 sf of retail space, however this is the area of newest growth and it is expected to continue attracting the higher-profile branded retail formats. The cluster has

a vacancy rate of 2.7% and the top retail categories are Grocery, Convenience and Specialty Foods; Home Improvement and Gardening; and Limited-service F&B.

Survey Summary

A community survey was conducted by the project team to inform the Gap Analysis. The survey was hosted on the Engage Morinville site and was shared with the community via the Town of Morinville's Facebook page and website. The survey was open between September 1 to 27, 2024 and received 229 responses. Most respondents (90.7%) reported living in the Town of Morinville.

Key findings included:

- **Visitation** – Most (76.4%) said they prefer to shop for day-to-day conveniences in the Town of Morinville. The most common reason (98.6%) amongst respondents for using shops and services in Morinville is that they live in the area, followed by working in the area (16.6%). Most respondents (76.9%) said that they prefer to visit St. Albert when shopping for bigger-ticket items such as home furnishings and decor, auto, apparel and electronics.
- **Household spending** – Respondents were asked to estimate the percentage of their spending that occurs inside and outside the Town of Morinville and online. Spending inside the municipality was highest in the category of convenience and day to day goods and services with the majority of respondents reporting spending up to 40% of their annual household spending in Morinville. Spending outside of Morinville was reportedly highest (81-100%) in the merchandise category of comparison goods and services. Approximately 60% of respondents reported spending 81-100% of their household spending on fashion outside of Morinville.
- **Gaps in goods and services** – Missing a specific retailer or services (92%) and missing specific merchandise (91%) were the most commonly selected reasons respondents do not use shops or services in the Town of Morinville. The cost of goods and services (39%) and hours of operation (36%) were also commonly selected reasons. When asked what shops or services are missing in the Town of Morinville, the most commonly selected merchandise category was fashion and accessories (95%) and sporting goods, books and hobbies (80%). Respondents provided more

specific desires as open-ended responses, mentioning such things as more clothing and footwear options, recreation and entertainment options, different types of restaurants, places to buy children's toys, and more.

The study team also interviewed five local businesses representing a variety of industry sectors. The purpose of these interviews was to develop an understanding of the current business landscape in Morinville, discuss challenges that local businesses face and identify barriers to attracting new businesses to the community.

Some findings include:

- **Current state of the economy in Morinville** – Interviewees commented that Morinville possesses less expensive housing and land, making it an attractive to potential residents and businesses. They opined that recent increases in property assessments was causing financial strain. They suggested that infrastructure improvements were needed to support further economic growth.
- **Businesses that Morinville needs** – Businesses interviewees also expressed a desire for more variety in retail offerings. They also suggested that the economy would benefit from the development of logistics support facilities (such as lay-down yards) and the growth of the automotive sector. There was also a clear demand for a hotel in Morinville, which could cater to visitors and potentially boost local tourism.
- **Business attraction strategies** – To further stimulate growth, Morinville needs shovel-ready lands, particularly the Coal Creek lands and areas south of the Industrial Park. These sites could be pivotal for attracting new developments and businesses, providing the necessary infrastructure to support economic expansion. Interviewees felt that some Area Structure Plans were too outdated and hindered development.
- **Challenges facing local businesses** – The labour market has become competitive, making it difficult for establishments to maintain adequate staffing levels. A considerable percentage of Morinville residents commute outside the municipality for work, leading to significant shopping leakages. Many residents choose to shop in nearby cities like St. Albert and Edmonton due to perceived service gaps in Morinville. This trend underscores the need for more diverse retail options and services to

retain local spending.

- **Barriers to attracting new businesses** – The most significant barrier to development in Morinville is felt to be the permitting process, particularly concerning Alberta Transportation. The current permitting process is viewed as cumbersome and fraught with red tape. To enhance the appeal of Morinville, there is a call for a comprehensive beautification and streetscape plan to address the perceived inadequate state of Main Street.
- **Relations between the Chamber of Commerce and Morinville** – Overall, the relationship between the Town and the Chamber of Commerce has been largely positive. Respondents commented that changes in Morinville's senior staff have contributed to instability in relationships between the Town and the Chamber.

Aside from the business interviews, an online survey was also deployed to reach as many businesses as possible to understand the state of the current market, challenges for local businesses and opportunities for new investment attraction. The survey was open from July 20 to September 26, 2024 and 41 responses were collected in total.

Businesses identified the lack of business space (retail and industrial) as a major challenge within the community. Respondents also expressed their dissatisfaction with Morinville's taxes and development/building permitting processes and a feeling that the municipality could do more to support local businesses. There was also concern regarding the availability of both skilled and unskilled labour within the community coupled with the availability of adequate housing.

Despite the low level of satisfaction with some factors, respondents felt that there are opportunities to attract new businesses to the community. The identified businesses included fitness, medical, grocery, building and construction, restaurants, and clothing stores. Businesses indicated that Morinville should try to encourage smaller-scale, local boutique businesses as well as larger recognized chain brands.

Demand Summary

The current estimated market share of trade area spending potential for Morinville is estimated at 19%. That means that over 80% of the resident trade area spending is likely spent outside of Morinville, most

likely in St. Albert.

As a comparison, comparably sized communities to Morinville in the region may have a retention rate of 30% to as high as 45%, which suggests that Morinville is under-retailed given its trade area attributes. However, the nature of Morinville’s location relative to St. Albert and the strong retail offering that has evolved in the city’s north is an ongoing challenge for Morinville in reaching the higher levels of this market share attraction.

The estimated market shares reveal that a category such as Grocery & Specialty Foods is capturing 44% of the trade area spending, where in reality this figure should be more in the range of 60%. The influence of Costco and Walmart in St. Albert must be considered as a primary factor in this market share.

Forecasts to 2034 premised on conservative, maintained rates of market share reveal demand for just over 75,000 sf of new floorspace. It would be reasonable to allocate a maximum need for 5 acres of potential new land, assuming that all of the new floorspace would be occupied in new development, most likely at the already zoned and ready-to-build south area node. A realistic expectation would be that some of this demand could be accommodated in some of the existing vacancies in 100 Avenue and/or 100 Street.

There is an alternative direction for Morinville’s retail opportunity that lies in incrementally increasing the overall market share of sales, while still being cognizant of the fact that drive times to larger markets like St. Albert and Edmonton will still prevail for many bigger ticket items. If market shares were to increase marginally, the total demand by the year 2034, based on conservative population growth, but with spending growth and increased retention could result in incremental new space of approximately 127,532 sf, or more than 50,000 sf than if the current market shares are maintained.

Conclusion

Demand forecasts for Morinville over the next decade, assuming conservative population increases, combined with marginal increase in overall market share of trade area spending suggest Morinville could add to its retail inventory by as much anywhere from 75,000 sf to 128,000 sf in specifically targeted categories/business types depending upon how the

area is marketed by the municipality and businesses-alike.

Combined with new-to-market retailers this could still leave sufficient demand and opportunities for a continued mix of locally curated retail concepts.

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 Morinville, the current market share rate of 19% is very low and illustrates the competitive influence that St. Albert has on Morinville’s retail growth. It further suggests that the market does present a reasonable and realistic opportunity to increase its market penetration by adding new retail businesses, even if those retailers may have locations in St. Albert, especially in the southern part of St. Albert.

To be successful in attracting additional inventory, store types or brands it will be necessary to increase the market share of trade area retail spending, and especially the Primary Trade Area. While there is no guarantee, the current retail market is absent of a few immediate opportunities for whom land exists 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. **The following tenants may be capable of moving the needle for sales retention and attraction in Morinville:**

Giant Tiger	Freshii
Red Apple	Chopped Leaf
JYSK	Osmow’s
Dollarama	Cob’s Bread
Goodwill	Mr. Mikes Steakhouse
Peavy Mart	Casual
Sleep Country	State & Main
Fit 4 Less (by Goodlife)	Fresh Slice Pizza
Planet Fitness	Firehouse Subs
Starbucks (with Drive Thru)	Jersey Mike’s
Mary Brown’s	Oodle Noodle
Burger King	Mucho Burrito
Carl’s Jr.	Coop Marketplace
Wok Box	
OPA!	
BarBurrito	



1.0 Introduction

1.1 Scope of Study

FBM Planning Ltd. ("FBM"), in collaboration with Goodeve and Associates ("Goodeve"), was commissioned by the Town of Morinville to conduct a Retail Gap and Complementary Sectors Analysis for the municipality.

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 Morinville to identify investment and business attraction in support of Morinville's Economic Development Strategic Plan.

The study was carried out in 2024. On-the-ground fieldwork in Morinville was carried out in May 2024.

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 Morinville in terms of geographic location, regional access and traffic counts, including relevant plans, studies and initiatives.

Section 3 – Trade Area: Identifies and defines Morinville's Trade Area and demographics including retail spending.

Section 4 – Commercial Supply: Provides a detailed documentation, tabulation and summary of the Town of Morinville's predominantly ground oriented retail and commercial business mix. This section also assesses the location and characteristics of Morinville'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 – Stakeholder and Consumer Engagement: Summarizes the consumer resident survey highlights as well as the business survey and stakeholder interviews.

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

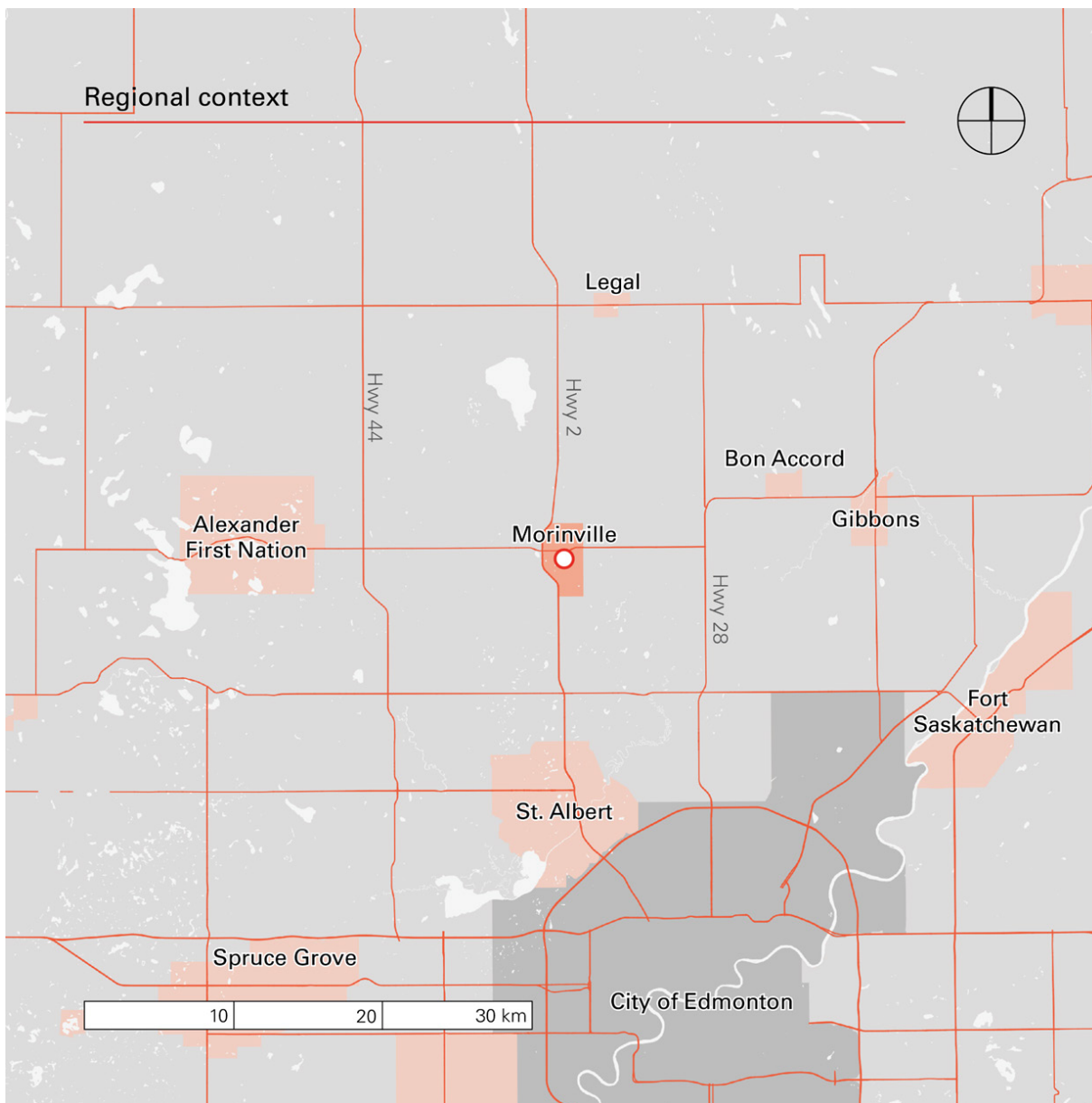
Location factors are foundational to retail success, and an understanding of these can help create the conditions necessary to attract and retain business in a community. This section identifies the local and regional characteristics of the Town of Morinville as they relate to the attraction and retention of retail businesses and merchandise categories.

2.2 Regional and Local Context

Referring to **Figures 2-1 & 2-2**, Morinville is located along Highway 2, one of Alberta's busiest and most important trunk roads. Morinville is located around 12 km north of St. Albert, and some 20 km north of Edmonton, placing it within the commuter-shed of the provincial capital. It sits within Treaty 6 territory, which spans across much of Alberta and Saskatchewan. Morinville has grown steadily over the past decade, from 9,375 (2013) to 10,775 (2023). The municipality is surrounded by the municipal district of Sturgeon County, which is largely agricultural. The below figure shows the location of the Town of Morinville in relation to nearby settlements, major roads, Alexander First Nation and the City of Edmonton.

Figure 2-1. Town of Morinville Context Map

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



2.3 Relevant Plans & Studies

This section summarizes relevant plans, policies and strategies that shape land use, growth, urban character, and economic development in the Town of Morinville. Planning documents are presented in order of their position in the hierarchy of plans, as outlined in the Municipal Development Plan, beginning with the high-level Municipal Sustainability Plan.

Municipal Sustainability Plan

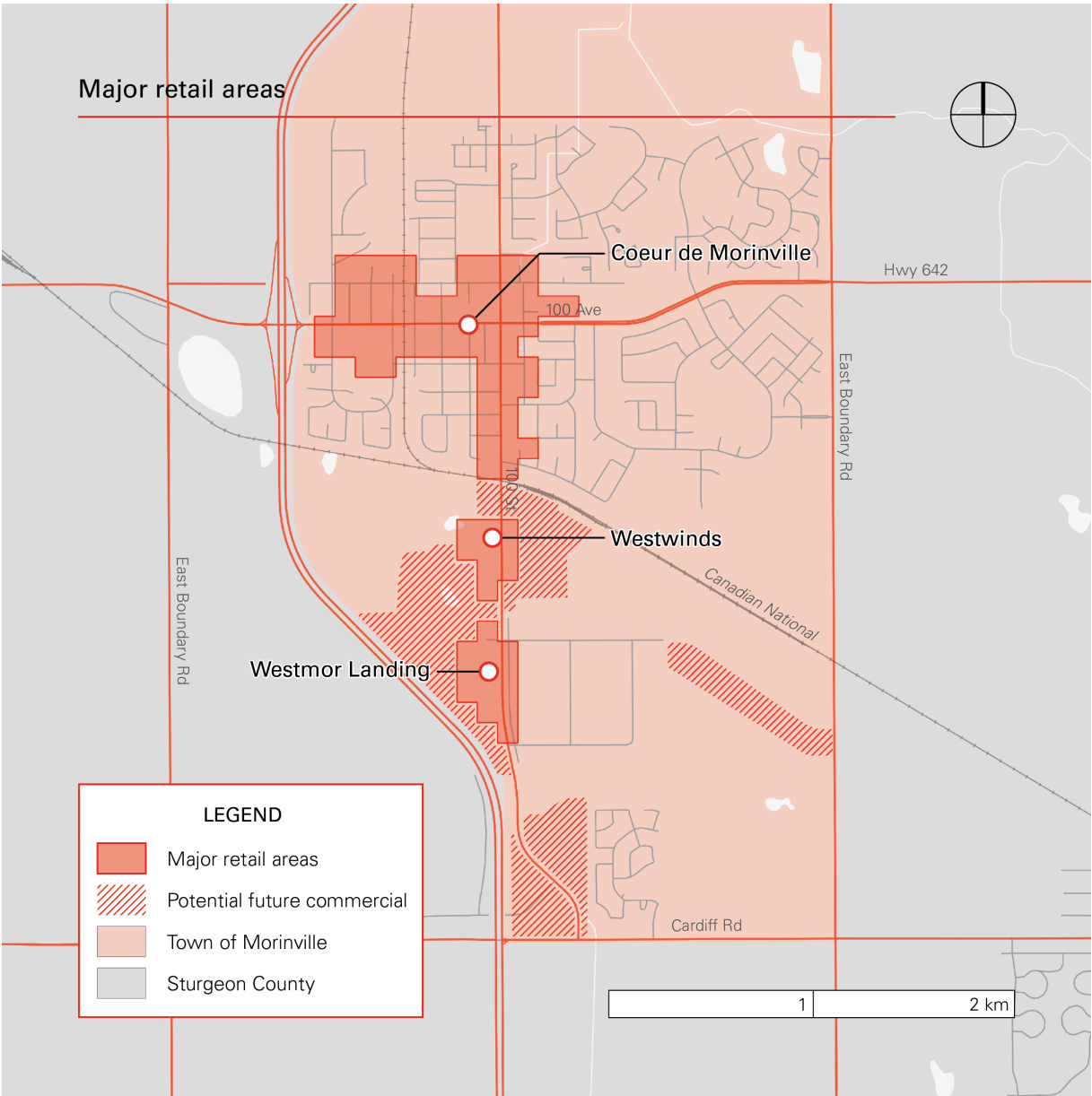
Informed by public consultations that began in 2009, the Municipal Sustainability Plan (MSP) was adopted by council in 2011, and is a long-range, strategic, high-level planning document intended to establish

a 25-year vision (up to 2035) for the community. The MSP is non-statutory and non-enforceable, but as Morinville’s highest-level plan, it is intended to “guide community decision-making toward a sustainable future”.

The document sets out 30 sustainability goals which are intended to reflect seven key principles, namely: quality of life, long-term planning, community engagement and partnership, integration, multiple bottom lines, living within environmental limits, and equity and the common good. The document expresses that these goals are intended to be relevant to all stakeholders, including local businesses and residents – i.e. not just the municipal government alone.

Figure 2-2. Town of Morinville Existing and Future Commercial and Business Areas

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



Among the 30 sustainability goals, some are relevant to commercial and retail development in the Town of Morinville. These goals, which are worded as aspirational statements expressing a vision for Morinville in 2035, are outlined below:

“Efficient community planning – land-use and community planning supports the development of an efficient, well-connected, complete and beautiful community.” This goal provides high-level direction about community planning. It introduces the idea of a “complete” community which implies, at a high level, that retail should be located in proximity to residents, and that a range of retail types and services should be available within Morinville.

“Shared identity – backgrounds of residents become more diverse and continue to be respected and reflected in Morinville’s welcoming and inviting culture and identity.”

“Desirable community – Morinville is recognized as the family choice: a desirable community with a high quality of life.” The goal establishes a desire to make Morinville a place with a high quality of life, especially for families.

“Affordable community – Morinville is an affordable place in which to live and retire.” The plan states that this goal relates not only to housing and social services, but also the affordability of “food and other services.”

“Thriving local businesses – Morinville supports and encourages a range of local businesses and employers.” This goal sets out an intent to support and develop the local economy; this study forms a part of these ongoing efforts.

“Complete visitor experience – Morinville is a desirable community to visit that offers a complete visitor experience and acts as a hub for regional tourism.” This sets Morinville’s intention to provide visitors a range of local attractions, unique retail businesses, and “improved streetscapes.” This policy direction applies especially to 100 Ave., the heart of the community and Morinville’s main tourism asset.

“Smart transportation – a multi-modal transportation system supports efficient movement throughout the community and region.” Morinville aims to support “alternative” (i.e. non-car) transportation modes such as walking, cycling, and public transit. This implies that the municipality aims to improve the walking and cycling environment, which has implications for the design and form of retail centres (including the existing city centre).

The focus of the MSP is outcomes, rather than the specific actions that will be taken to achieve them. Although the MSP is an administrative (non-statutory) document, these high-level goals are clearly reflected in more recent plans and policies, including the Municipal Development Plan and others outlined below.

Municipal Development Plan

Whereas the MSP sets out the municipality’s desired outcomes, the Municipal Development Plan (MDP) provides more detail on how to get there.

Under Alberta’s Municipal Government Act, every municipality in the province must adopt a municipal development plan (MDP), an overarching, statutory land-use document. An MDP sets out policy statements relating to, among other things, future land use within the community, future growth patterns, transportation infrastructure, and the provision of municipal services. The MDP, last amended in 2021, covers the entire Town of Morinville.

Council has also approved a number of area structure plans (ASPs), which are statutory plans at the neighbourhood scale. These are outlined in subsequent subsections. However, according to the Municipal Government Act, where an ASP and an MDP are inconsistent or in conflict, the provisions of the MDP shall prevail.

Growth Management Strategy

The MDP lays out a growth management strategy, which aims to achieve various broad objectives. Some of these objectives that pertain to Morinville’s retail sector include: revitalization and repopulation of the downtown core; creation of a more compact urban form; strengthening of Morinville’s non-residential tax base; and improvement of public spaces.

This chapter of the MDP also defines specific growth management policies. It states that Morinville will promote “a mixture of land uses to create a viable, attractive, complete community.” Similarly, it states that the downtown core should have a “proportionate balance of residential, retail, and jobs and provide numerous civic and social facilities.” In short, the policy affirms that commercial retail shall remain one of the key elements of the town centre. A separate policy says that Morinville should support walkability and other travel modes and create welcoming public spaces. These policies are consistent with the goals of the MSP.

The Cœur de Morinville, or downtown area, is recognized as a distinct “growth management area.” The MDP (page 34) states that the district contains many opportunities for growth through infill development and redevelopment. It notes, in particular, that the 100 Avenue corridor has a number of large commercial lots that are “undeveloped or underdeveloped” and that these could support “a more intensive mix of development”.

Land Use Designations

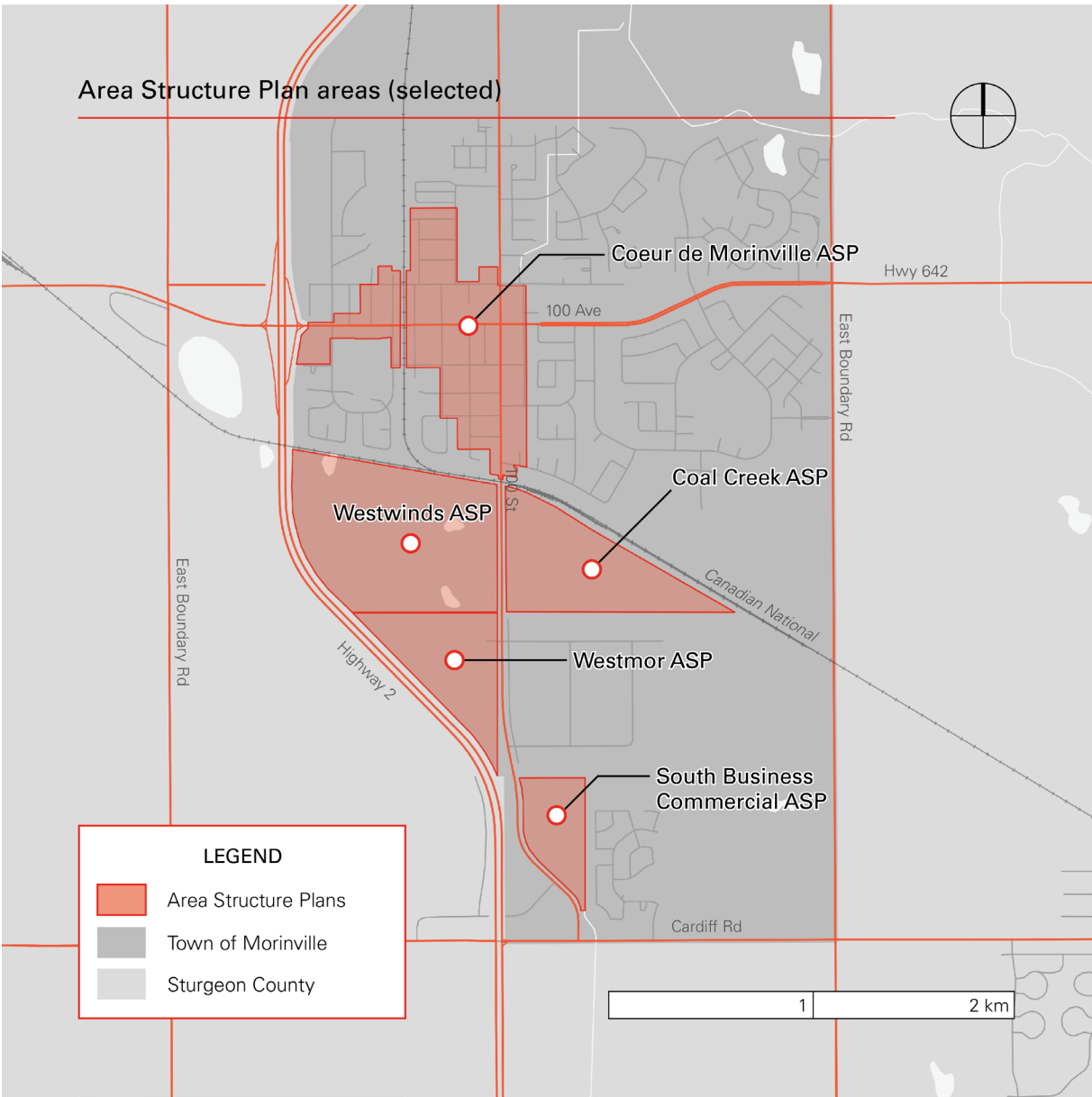
The MDP also classifies the entire municipality into four land use designations, namely:

- 1. *Cœur de Morinville*
- 2. *Residential*
- 3. *Commercial*
- 4. *Business industrial*

The majority (around two thirds) of the retail commercial floor space recorded in this study is located within the “Cœur de Morinville” land use designation. The remaining third is mainly concentrated in areas designated “Commercial” in the south (**Figure 2-3**).

Figure 2-3. Town of Morinville Area Structure Plans With Notable Commercial Elements

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



The MDP states the following goal for the Cœur de Morinville:

To increase the vitality and sustainability of the downtown Cœur de Morinville neighbourhood through improved mobility, streetscaping and open spaces, increased population, a range of commercial enterprise, and celebration of its rich heritage.

The MDP is aligned with the Cœur de Morinville Area Structure Plan (ASP), which is outlined below. It emphasizes the mixed-use, vibrant nature of the downtown area, which is home to commercial, residential, recreational, and tourism uses. It identifies the Cœur as the “cultural and social heart of the community” and a place with “enormous potential”.

The document states that Morinville will encourage “small-scale, boutique and retail commercial developments in the Cœur de Morinville.” It states that new developments will be “street-oriented” with parking located at the rear of the building, and that Morinville will support mixed-use, commercial-residential development in the downtown. Basically, the MDP aims to support traditional, mainstreet retail and a more urban, less car-oriented form of development in the downtown area.

With regard to the “Commercial” land use designation, the MDP aims to “locate commercial uses appropriately along the main commercial corridors, in the downtown core, and in residential neighbourhoods; and, to employ applicable urban design standards to new development to improve the attractiveness of the community’s commercial developments.” It recognizes that commercial uses are concentrated on 100 Avenue and 100 Street. It states that “highway and service commercial uses” (e.g. larger format retail with greater land take) are best located in areas outside the Cœur de Morinville, namely the areas south of the Canadian National railway line, along 100 St. Within this report, this distinct, emerging retail area has been profiled separately from the Cœur de Morinville.

Lastly, the MDP outlines various other policies relating to infrastructure, economic development, and other matters, some of which relate to retail-commercial development prospects. According to the MDP, the town shall “discourage non-contiguous growth and unnecessarily premature extension of municipal services.” It suggests that Morinville should leverage its strategic location along Highway 2 to attract non-residential developers and businesses.

One economic policy, which aims to diversify the local economy, provides some direction on the type of

retail (and food and beverage) Morinville should aim to support: “unique retail and commercial [...] mid-to-high-end restaurants and tourism”. It is clear that the Town of Morinville aims to support local tourism in part by offering unique retail and dining experiences.

Cœur de Morinville Area Structure Plan

Many of the policies and aims of the Cœur de Morinville Area Structure Plan, which was adopted in 2013, are reflected in the more recent Morinville MDP, and were therefore outlined above. The ASP views the downtown area as a vibrant commercial, social, cultural, and civic hub.

The ASP identifies several major issues in the downtown area. 100 Avenue functions as both a community main street and as a provincial highway. It sees relatively fast, heavy vehicular traffic and can be difficult for pedestrians to cross, which could hinder its continuing development as a retail centre by discouraging would-be shoppers. The ASP recommended the installation of roundabouts to help calm traffic, but this has not yet been pursued.

The plan also identifies vacant land along 100 Ave. as both a challenge and an opportunity. It posits that vacancy may be related to the fact that development approval is complicated by dual municipal-provincial jurisdiction along the corridor, which could be promoting development along 100 Street – solely under municipal jurisdiction – instead. The ASP suggests that downtown suffers from a lack of drawing power and critical mass. This could be improved by a wider array of targeted retail offerings.

The ASP aims to make downtown more vibrant and aesthetically pleasing by creating strong commercial corridors through development and reinvestment along 100 Street and 100 Ave. The plan aims to reduce retail and commercial vacancy, increase density, establish successful anchors, establish a complementary trade mix, and promote pride in ownership.

Westwinds Area Structure Plan

The Westwinds development forms part of the southern retail cluster that is profiled in Section 4.4. Westwinds is a mixed-use suburban development, located immediately south of the Canadian National railway, that is principally owned by developer Landrex. The Westwinds ASP was adopted in 2004 and amended in 2016.

The development concept for the Westwinds ASP (**Figure 2-4**) is a “village” with a unique identity and a mix of land uses. The development concept plan sets aside around seven hectares of “corridor commercial”

land located along 100 Street. At present, this land is around 30 per cent developed with both freestanding and multi-tenant retail buildings. Continued retail development is underway.

Coal Creek Area Structure Plan

Adopted in 2017, the Coal Creek Area Structure Plan covers a 36.35-ha wedge-shaped tract of land immediately north of the Morinville Industrial Park, bounded to the west by 100 St and to the north by the Canadian National rail line. As of 2024, this land has yet to be developed.

Under the approved land use concept, around 37.1 per cent of the ASP is set aside for Commercial land use. This is concentrated on the western side of the site, adjacent to 100 St. Another 37.9 per cent of the site is set aside for Business Industrial use, which

is concentrated on the east side of the site. The Commercial land use is set aside for uses found in the Corridor Commercial (C3) District of Morinville’s land-use bylaw.

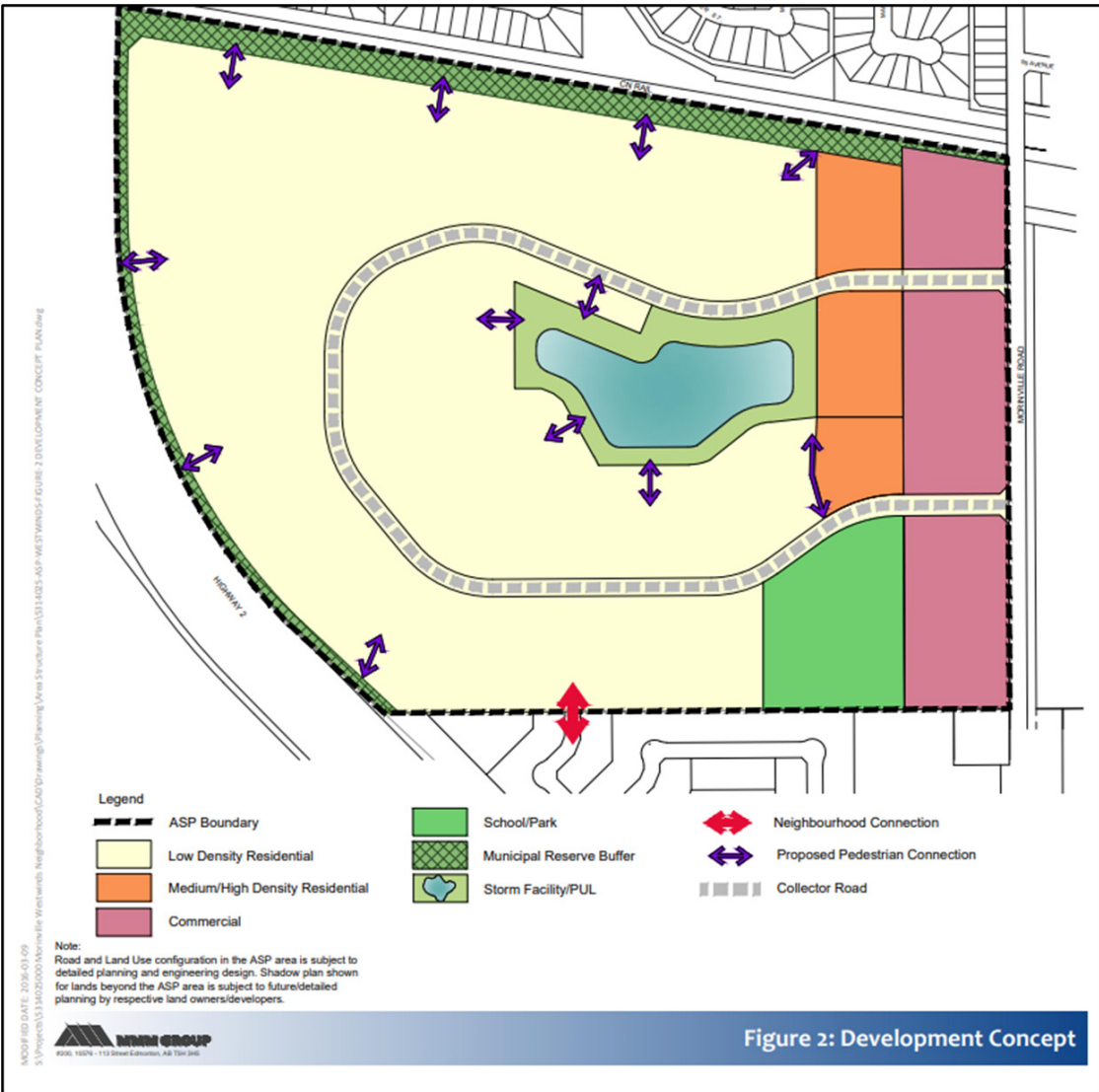
South Business Commercial Area Structure Plan

In 2015, the Town of Morinville adopted an ASP for a future development site south of the existing industrial park (**Figure 2-5**). This land, primarily designated for commercial use, has yet to be developed. The lands were, at the time the ASP was drafted, fully owned by a single private developer, and amounted to 15.72 ha.

Under the proposed land use concept (**Figure 2-6**), most (57 per cent) of the site is dedicated to “Corridor Commercial” use. The northern portion of the site (21.6 per cent) is designated for “Business

Figure 2-4. Westwinds ASP Development Concept

(Source: Town of Morinville)



Industrial/Office” use. The remaining land area is for stormwater management, utilities, roads, etc.

Westmor Development Park ASP

The Westmor Development Park ASP was adopted in the 1990s and amended in 2002 and 2003. It covered an area of undeveloped land bounded by Highway 2, the Canadian National railway, 100 Street, and undeveloped land to the south. The lands covered by part of the ASP are currently under development and include recently opened retail along 100 Street, such as the Shell gas station, Boston Pizza, and McDonald’s. This area is also covered by the more recent Westwinds ASP.

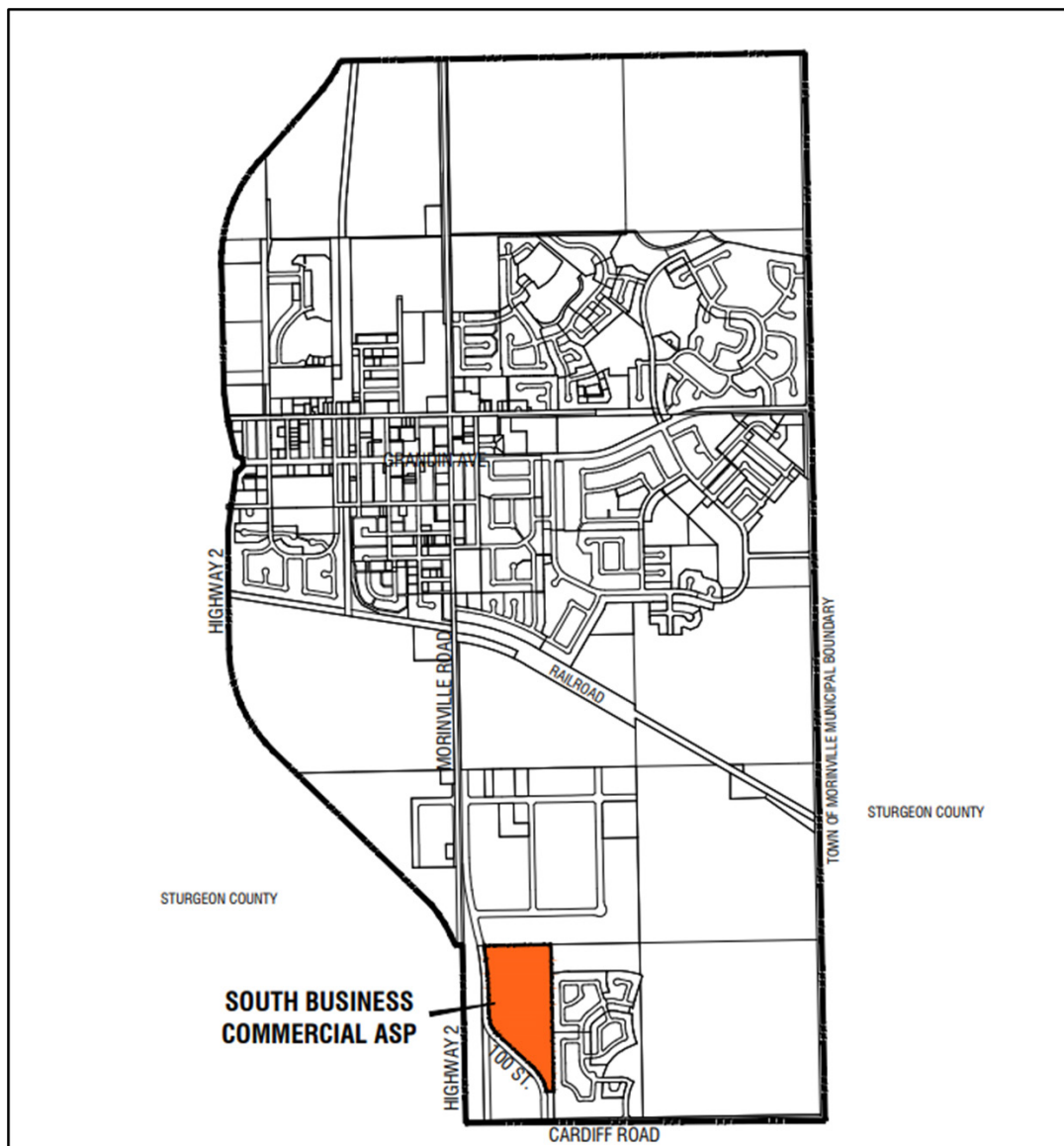
The ASP covers around 94.23 ha of privately owned land that is generally flat and suitable for development.

Edmonton Metropolitan Region Growth Plan

Morinville is a member of the Edmonton Metropolitan Region Board (EMRB), and participated in the drafting of the Edmonton Metropolitan Region Growth Plan (EMRGP), which was approved by the provincial government in 2017. The EMRGP, last amended in 2020, aims to manage growth responsibly, making the Edmonton region more globally competitive and prosperous. It promotes compact growth, effective use of infrastructure investments, prudent management of agricultural resources, and environmental protection.

Figure 2-5. South Business Commercial ASP Location Context

(Source: Town of Morinville)



Within the EMRGP, Morinville is defined as a rural and sub-regional centre. This is defined as “a centre in the rural area that provides a sub-regional level of service to meet the needs of their own community and those in the wider area. Sub-regional centres have potential to accommodate higher-density mixed-use development, appropriate to the scale of the community.”

In line with the intention to promote compact development, the EMRGP requires a minimum greenfield density of 30 dwelling units per net residential hectare in Morinville.

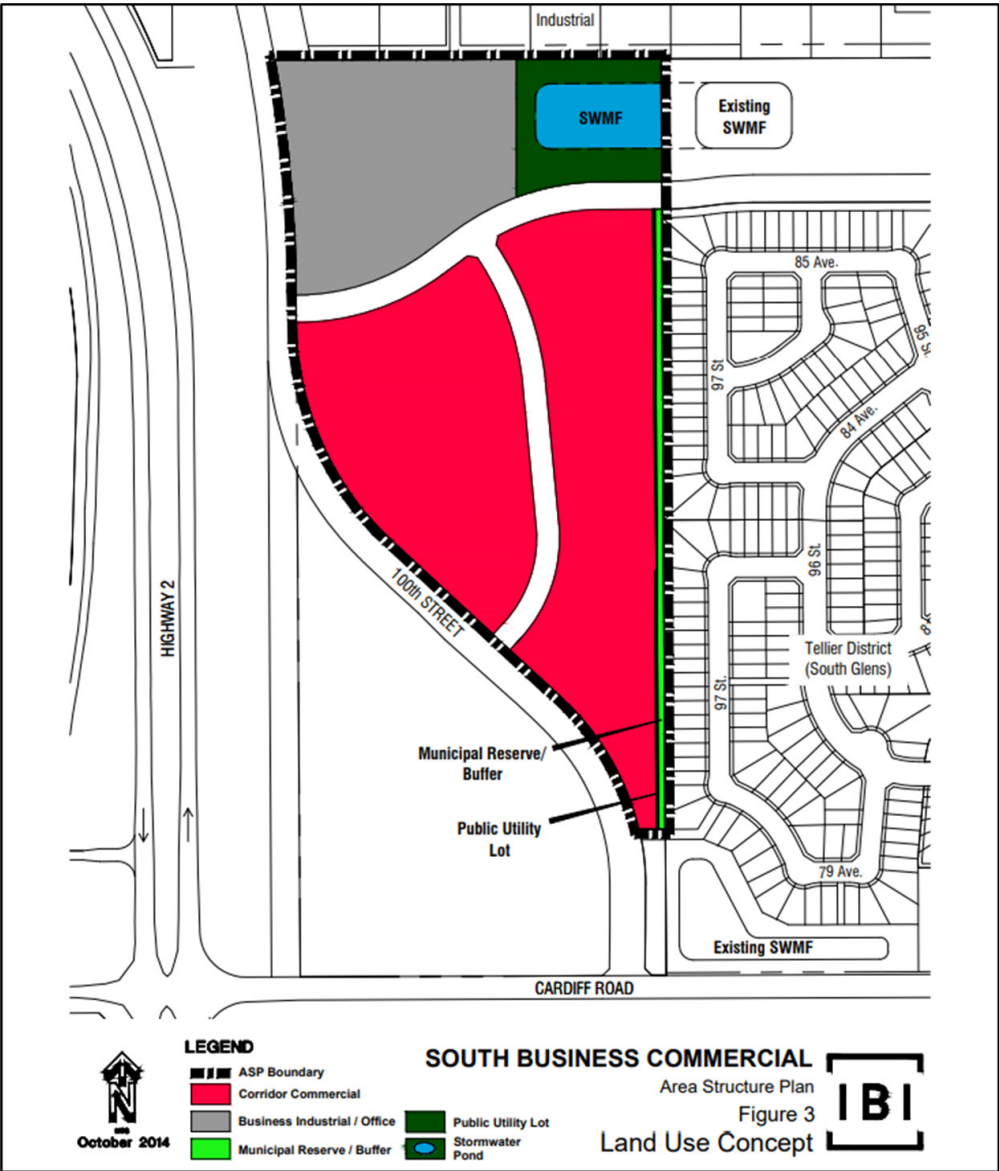
According to Morinville’s MDP, at such a density, the total population potential within the current Town

of Morinville is around 33,000 people, meaning the population projections in the following paragraph are accommodated within the existing municipal boundary.

Schedule 1 of the EMRGP sets out projected employment and population projections for the Edmonton Metropolitan Region and its constituent municipalities for the year 2044. The low estimate for Morinville is 15,200, and the high estimate is 17,900. Employment in Morinville is estimated to grow from 2,779 (2014) to 4,344 (2044). By 2044, the EMRGP estimates that the population of the region will grow to between 1,956,700 and 2,235,100.

Figure 2-6. South Business Commercial ASP Land Use Concept Plan

(Source: Town of Morinville)



Economic Development Action Plan

The Economic Development Action Plan (EDAP) covers the 2021-2026 period and aims to promote investment in Morinville, retain existing businesses, and remove barriers to business expansion. Within the EDAP, council affirms that “support of local businesses of all sizes and forms is paramount to [Morinville’s] future success.” The EDAP recognizes a need to diversify the municipality’s economy and provide more local employment.

In line with Morinville’s planning documents, the EDAP identifies downtown Morinville as the heart of the community as well as the municipality’s commercial centre.

Selected relevant “priority outcomes and activities” proposed by the EDAP include:

- *Increase non-residential assessment by \$2.14 million each year for the next five years (move toward 80:20 residential/non-residential ratio)*
- *Review land-use regulations and land-use policies with an “economic lens” (Red Tape Reduction)*
- *Ensure adequate supply of commercial and industrial properties in Morinville*
- *Increase number of local jobs*

Strengths and challenges

The EDAP also proposes various actions to support and showcase Morinville businesses and boost awareness of Morinville generally, especially within the business/industrial community. It includes a SWOT analysis of Morinville, from which selected relevant considerations are copied below:

Strengths

- *Low, competitive tax rates for non-residential*
- *Proximity to St. Albert, Edmonton, CFB Edmonton*
- *Young population*
- *Highway access*
- *Business-friendly municipal staff*
- *Lower lease rates compared to region*

Challenges

- *Mature downtown needs refresh*
- *Low rental vacancy*
- *Retaining local small businesses*
- *Lack of public transportation*

Opportunities

- *Potential northward truck stop*

- *Room for new businesses*
- *Mixed-use development in downtown core*

Threats

- *Lack of affordable housing*

Relevant objectives and activities

The EDAP aims to attract new businesses in targeted sectors, including (of relevance to this assignment), “unique commercial/retail operations” and “mid-high-end restaurants with appropriate mix of family-friendly establishments.” It aims to retain and support the expansion of existing local businesses by addressing issues impeding business growth, and by reducing “red tape.”

There is also an emphasis placed on facilitating a mix of residential housing types, which could be realized in part through mixed-use development in the downtown core. The EDAP proposes that planning documents should be reviewed with an “economic lens” and mentions the issue of parking in the downtown core (without making a specific recommendation in that regard).

2.4 Building Permit Data

Municipal building permit data covering the period from 2019 to 2024 (**Table 2-1**) was reviewed to help develop an understanding of commercial and industrial development trends. The consultants attempted to exclude residential building permits from the analysis, however this exercise was somewhat imprecise as building permit data does not include the land use (e.g. commercial, residential) for each case.

There was, during this period, a marked increase in the number of permits issued for the installation of rooftop solar photovoltaic systems although this was excluded from this analysis.

In total, approximately 61 building permits have been issued since 2019 for commercial and industrial uses. The number of permits issued per year was relatively steady, ranging from six (2019) to 14 (2021). The total value of permits issued ranged from \$792,000 to nearly \$3 million each year, except for one notable outlier, 2024. The spike in permit values this year was mainly due to a new Shoppers Drug Mart store, valued at \$8.9 million, which is under construction near No Frills in the Westmor Landing development. Excluding this project, the total building permit value in 2024 by mid-year was \$3,610,272 which still represents a significant uptick in commercial development activity.

Table 2-1. Town of Morinville Building Permit Data 2019 to 2024

(Source: Town of Morinville)

Year	Number of commercial/ industrial permits (approx.)	Total value materials and labour (closed permits)	Total value materials and labour (in progress)	Total
2019	6	\$1,917,295.00	\$0	\$1,917,295.00
2020	12	\$792,111.95	\$0	\$792,111.95
2021	14	\$2,909,572.55	\$0	\$2,909,572.55
2022	11	\$2,261,178.58	\$0	\$2,261,178.58
2023	12	\$853,942.00	\$590,000	\$1,443,942.00
2024 (mid year)	8	\$29,272.54	\$12,481,000.00	\$12,510,272.54

2.5 Transportation

Transportation infrastructure is an essential contributing factor to commercial retail demand in a particular area. An understanding of Morinville's transportation attributes can assist us in creating the necessary conditions for attracting and retaining businesses and residents.

Figure 2-7 below presents provincial traffic counts on highways in and around Morinville. The primary transportation corridor in the area is Highway 2, a divided expressway that marks the western limit of the Town of Morinville. The highest traffic volumes (exceeding 15,000 annual average daily traffic [AADT]) were recorded on Highway 2 just south of Morinville, which may reflect the high number of commuters who travel to the Edmonton area. North of Morinville, Highway 2 remains a strategic north-south corridor providing access to many northern communities, however traffic volumes decline to around 5,820 AADT. Morinville's two primary commercial streets, 100 Avenue and 100 Street, see around 8,000 vehicles daily.

Future transportation plans are outlined in Morinville's Transportation Master Plan (TMP), adopted in 2020. There are plans to upgrade several existing roads (including 100 Ave, 100 St, Cardiff Rd, and East Boundary Rd) to accommodate rising traffic volumes. There are also long-term (25+ year) plans for two new east-west roads to facilitate growth and relieve traffic on 100 Ave.

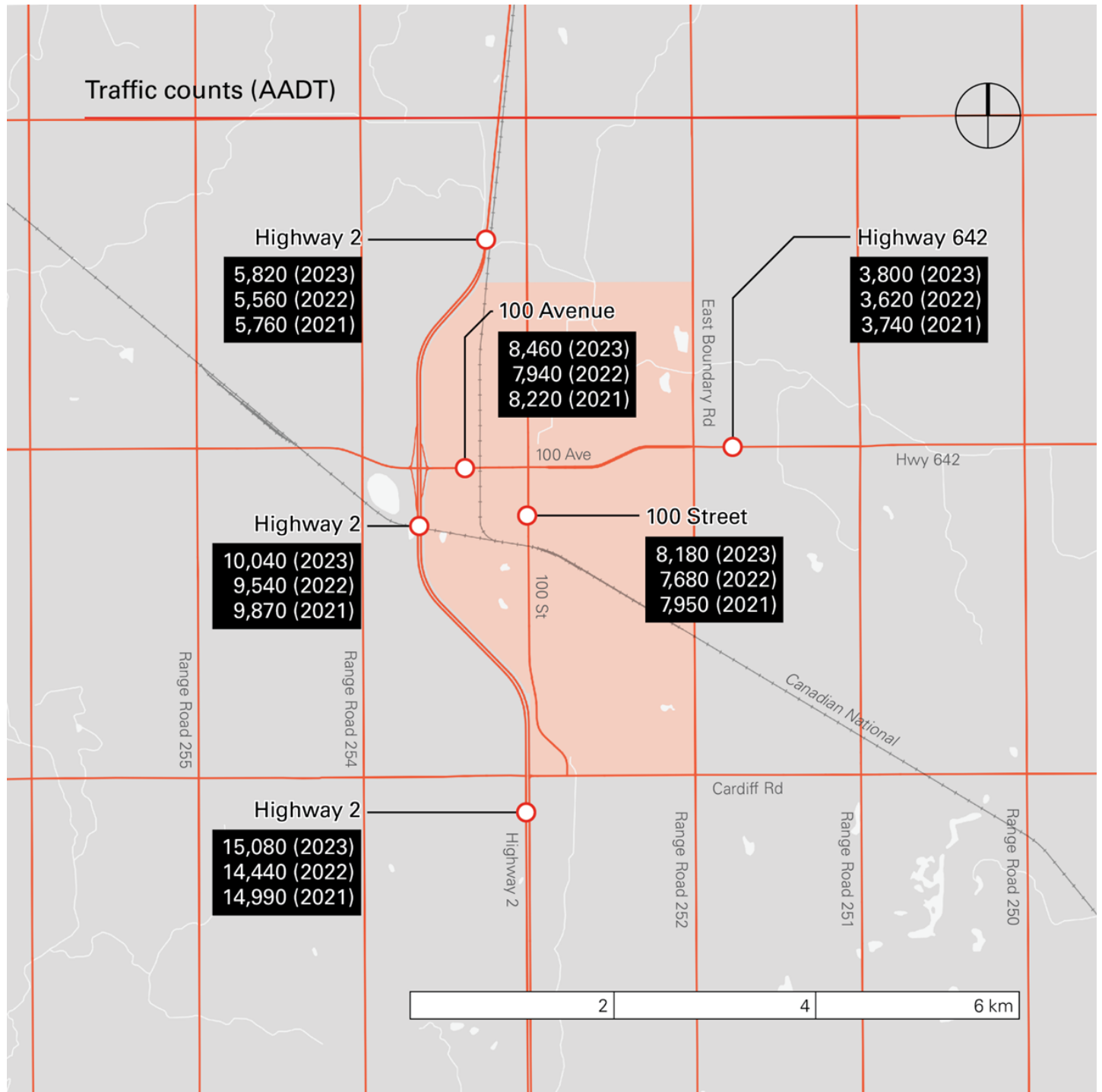
Another relevant document is the EMRB Integrated Regional Transportation Master Plan (IRTMP), first approved in 2011. EMRB regularly publishes lists of priority transportation projects.

The latest such update (2024) identifies as a priority project the long-planned upgrade of the junction of Highway 2 and Cardiff Road, transforming the at-grade intersection into a grade-separated interchange. This project, which would improve access in particular to the commercial development in the southern half of Morinville, is classified as a "medium priority."

Morinville does not have public transit at present. The EMRB Growth Plan anticipates that a regional transit service, connecting Morinville to St. Albert, will be required by the year 2044. The Town of Morinville, in the TMP, commits to supporting public transit connections to neighbouring communities, and such a service could, in the future, support commercial development.

Figure 2-7. Provincial Traffic Counts

(Data source: Province of Alberta)



3.0 Trade Area

3.1 Introduction

In order to establish a framework in which to evaluate retail demand and identify gaps in the provision of shops and services, it is necessary to define a trade area from which Morinville's retail sales are most frequently generated. Factors that influence the definition of a trade area include drive times, demographics, spending attributes and competition, and proximity to competing retail centres. These variables collectively help create a picture of the market for prospective tenants, developers, and investors.

Identification of the trade area is important for understanding the total market potential available to current and future retailers. The local and regional residential population has particular demographic characteristics and spending habits that provide insight as to the types of retail tenants that are most compatible with the market, the amount of retail floor space supportable by the market, the current inflow and outflow of retail sales, and for which spending categories such inflow or outflow exists.

A retail trade area is the geographic region from which regular retail patronage could be expected. It is defined based on a series of boundary determinants, which are outlined below:

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

For this particular study, the retail trade area (Figure 8) was particularly influenced by a combination of drive times and competitive forces. The trade area encompasses areas roughly within a 20-minute drive to the north and west, encompassing the Town of Legal and Alexander First Nation. According to Morinville's Municipal Development Plan, larger economic centres such as Edmonton have traditionally drawn shoppers away from Morinville. The trade area was therefore defined more conservatively to the east and south, reflecting the presence of strong competitive forces especially in the communities of St. Albert, the City of Edmonton, and Fort Saskatchewan.

3.2 Population Demographics and Projections

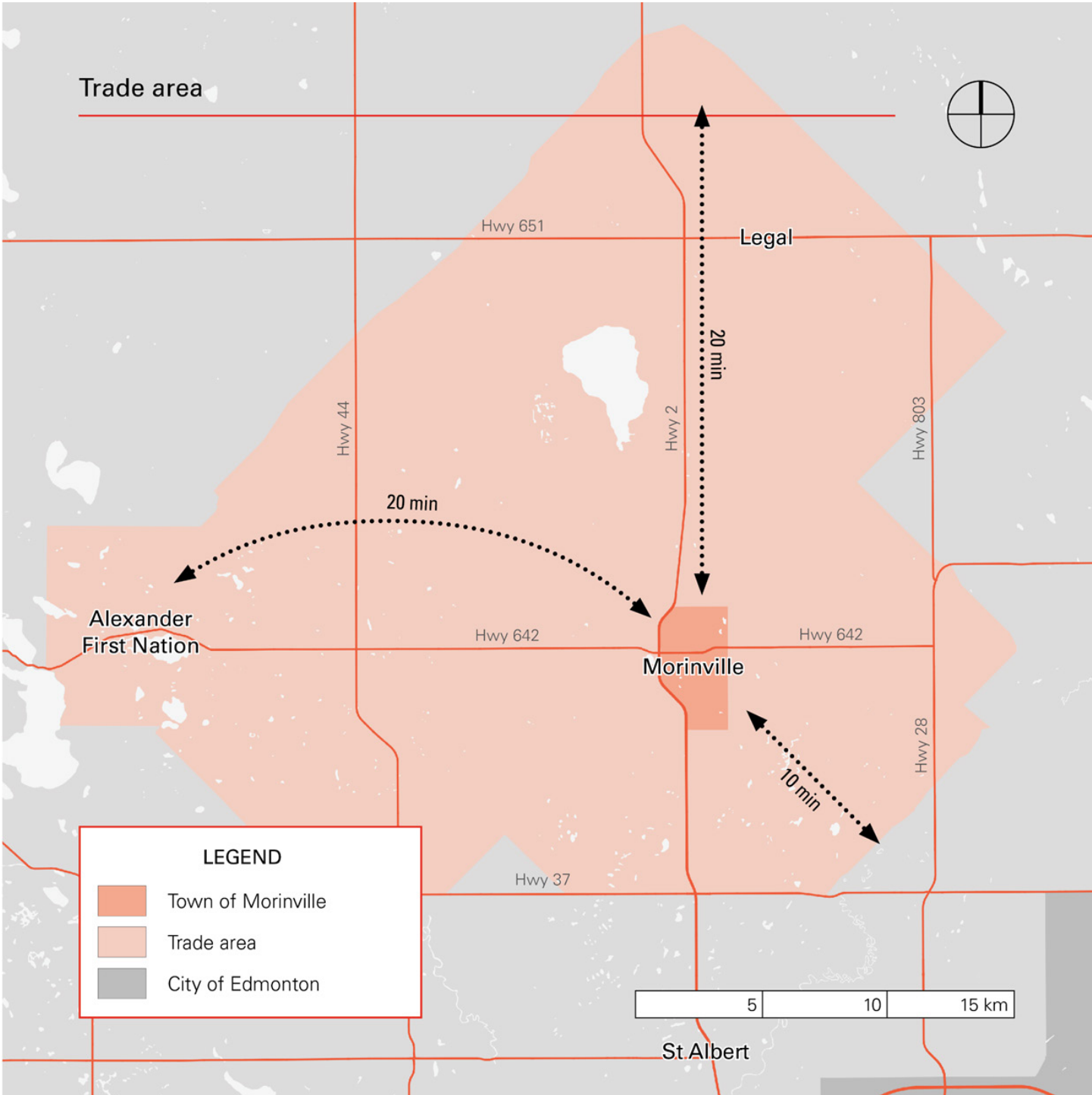
The most recent Statistics Canada Census release (2021) as well as Manifold Data Mining Inc (2023/24), a leading supplier of demographic and consumer expenditure information, were used to tabulate population estimates and growth forecasts for the identified Trade Areas. These forecasts represent a snapshot based on demographic models and do not account for future planning realities that may influence population growth.

Estimated for the year-end 2023, the population of Morinville's trade area is 19,343 and is projected to grow by 0.79% annually over the next five years (**Tables 3-2 & 3-3**). Notably the Town of Morinville, which comprises the majority of the Trade Area, has a projected population growth of 1.21% annually over the next five years. Slow population growth in the Trade Area outside of Morinville has likely impacted the projected population growth rate. In comparison, provincial growth is projected to be 0.97% annually over the next five years.

By age, the Morinville Trade Area is substantially similar to the province with only a slightly higher percentage of population under the age of 14 (**Table 3-5**). By household income, the Morinville Trade Area has a slightly higher percentage (56.74%) of households with incomes over \$100,000 compared to the province (48.44%). The average income of the Trade Area is \$130,922 which is comparable to the provincial average of \$131,803 (**Table 3-6**).

Figure 3-1. Morinville Retail Trade Area

(Source: FBM)



From an education perspective (**Table 3-2**), the Morinville Trade Area has a slightly higher percentage (40.59%) of the population over the age of 15 who has a postsecondary certificate or diploma below a bachelors level when compared to the province (30%). However the percentage of those with a university certificate, diploma or degree at bachelor level of above is significantly lower in the Trade Area (10.22%) when compared to the province (25.67%).

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 Morinville’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 dominant CanaCode Lifestyle Cluster in the Trade Area is “G: Up the Ladder” at 27.4% of the Trade Area population. This is also the second-most-prominent Lifestyle Cluster in Alberta, representing 15.3% of the population.

Figure 3-2 and Table 3-4 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’s.

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

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 Atmosphere, No Frills as well as online shopping.

Figure 3-2. Dominant CanaCode Lifestyle Cluster in Morinville Trade Area

(Source: FBM)

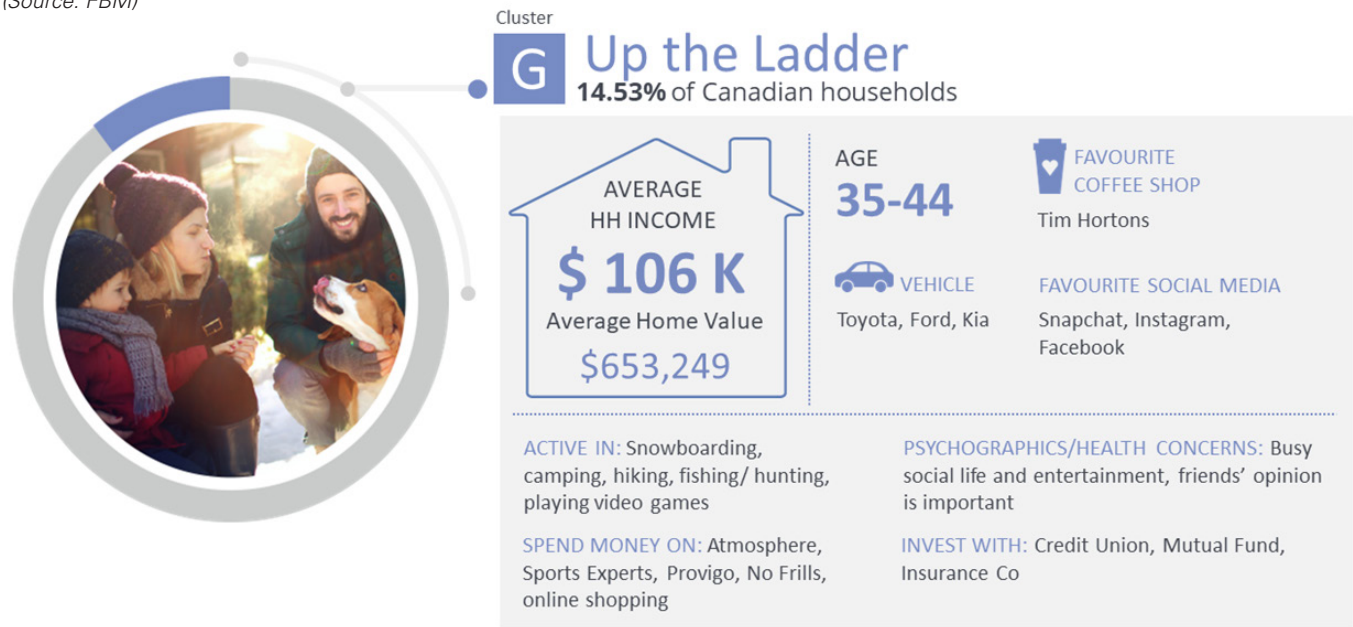


Table 3-2. Trade Area Summary Table

(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		Town of Morinville			Morinville Trade Area		
	PR: Alberta, AB							
	value	percent	value	percent	index	value	percent	index
SUMMARY								
Total population	4,651,538		11,092			19,343		
Total population age 15 and over	3,817,720		8,716			15,467		
Total number of private households	1,782,214		4,035			6,992		
Average number of persons in private households	2.55		2.68		105	2.73		107
POPULATION AGE								
Population age 0-14	834,722	17.95%	2,379	21.45%	119	3,876	20.04%	112
Population age 15-24	557,719	11.99%	1,270	11.45%	95	2,312	11.95%	100
Population age 25-34	657,223	14.13%	1,535	13.84%	98	2,461	12.72%	90
Population age 35-44	716,356	15.40%	1,863	16.80%	109	2,942	15.21%	99
Population age 45-54	585,733	12.59%	1,229	11.08%	88	2,245	11.61%	92
Population age 55-64	563,244	12.11%	1,244	11.22%	93	2,524	13.05%	108
Population age 65+	732,739	15.75%	1,560	14.06%	89	2,984	15.43%	98
EDUCATION								
Total population aged 15 years and over by highest certificate, diploma, or degree	3,816,815		8,713			15,467		
No certificate, diploma, or degree	594,252	15.57%	1,407	16.15%	104	2,510	16.22%	104
High school diploma or equivalent	1,097,589	28.76%	2,968	34.06%	118	5,098	32.96%	115
Post-secondary certificate, diploma, or degree	2,124,975	55.67%	4,339	49.80%	89	7,859	50.81%	91
Postsecondary certificate or diploma below bachelor level	1,145,139	30.00%	3,462	39.73%	132	6,278	40.59%	135
Apprenticeship or trades certificate or diploma	332,377	8.71%	1,223	14.04%	161	2,336	15.10%	173
College, CEGEP or other non-university certificate or diploma	689,881	18.08%	1,983	22.76%	126	3,507	22.67%	125
University certificate or diploma below bachelor level	122,881	3.22%	257	2.95%	92	435	2.81%	87
University certificate, diploma, or degree at bachelor level or above	979,836	25.67%	877	10.07%	39	1,581	10.22%	40
Bachelor's degree	683,367	17.90%	721	8.28%	46	1,279	8.27%	46
INCOME								
Average family income \$	\$154,623.00		\$141,073.00		91	\$143,245.00		93
Average household income \$	\$131,803.00		\$128,599.00		98	\$130,922.00		99
Average income population age 15 and over (\$)	\$66,723.00		\$65,799.00		99	\$64,944.00		97
Population with income Under \$10,000 (including loss)	267,179	7.00%	584	6.70%	96	1,084	7.01%	100
Population with income \$10,000 to \$19,999	349,804	9.17%	704	8.08%	88	1,343	8.68%	95
Population with income \$20,000 to \$29,999	534,160	14.00%	937	10.75%	77	1,772	11.45%	82
Population with income \$30,000 to \$39,999	447,081	11.71%	831	9.54%	81	1,552	10.03%	86
Population with income \$40,000 to \$49,999	383,857	10.06%	792	9.09%	90	1,395	9.02%	90
Population with income \$50,000 to \$59,999	321,454	8.42%	772	8.86%	105	1,332	8.61%	102
Population with income \$60,000 to \$69,999	267,762	7.02%	702	8.06%	115	1,214	7.85%	112
Population with income \$70,000 to \$79,999	216,784	5.68%	682	7.83%	138	1,120	7.24%	127
Population with income \$80,000 to \$89,999	170,936	4.48%	554	6.36%	142	886	5.73%	128
Population with income \$90,000 to \$99,999	143,911	3.77%	438	5.03%	133	773	5.00%	133
Population with income \$100,000 and over	530,405	13.90%	1,266	14.53%	105	2,233	14.43%	104
Population with income \$100,000 to \$149,999	288,547	7.56%	933	10.71%	142	1,440	9.31%	123
Population with income \$150,000 and over	241,858	6.34%	333	3.82%	60	793	5.13%	81

Table 3-3. Trade Area Population Breakdown

(Source: FBM & Manifold Data Mining Inc.)

Attribute	Benchmark		Town of Morinville			Morinville Trade Area		
	PR: Alberta, AB							
	value	percent	value	percent	index	value	percent	index
PROJECTIONS								
Annual population growth in the period: Next 3 years		0.98%		1.23%	126		0.47%	48
Annual household growth in the period: Next 3 years		1.24%		1.53%	123		0.70%	56
Annual population growth in the period: Next 5 years		0.97%		1.21%	125		0.79%	81
Annual household growth in the period: Next 5 years		1.22%		1.51%	124		1.15%	94
Annual population growth in the period: 5 to 10 years from current year		0.92%		1.13%	123		0.75%	82
Annual household growth in the period: 5 to 10 years from current year		1.13%		1.41%	125		1.08%	96
POPULATION GROWTH								
Current year total population	4,651,538		11,092			19,343		
3-Year Projections - Total population	4,790,192		11,507			19,804		
5-Year Projections - Total population	4,882,352		11,782			20,129		
10-Year Projections - Total population	5,111,028		12,462			20,902		
HOUSEHOLD INCOME GROWTH								
Current year average household income	\$131,803.00		\$128,599.00		98	\$130,922.00		99
3-Year Projections - Average household income	\$137,762.00		\$137,272.00		100	\$134,052.00		97
5-Year Projections - Average household income	\$146,237.00		\$149,211.00		102	\$143,820.00		98
10-Year Projections - Average household income	\$161,354.00		\$171,447.00		106	\$161,542.00		100

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

Table 3-4. CanaCode Lifestyle Clusters

(Source: FBM & Manifold Data Mining Inc.)

Attribute	Benchmark		Town of Morinville			Morinville Trade Area		
	PR: Alberta, AB							
	value	percent	value	percent	index	value	percent	index
A: AFFLUENTS	118,911	6.63%	0	0.00%	0	8	0.11%	2
B: ELITE PROFESSIONALS	205,144	11.44%	580	13.86%	121	626	8.95%	78
C: ETHNIC CRUISERS	68,480	3.82%	6	0.14%	4	8	0.11%	3
D: NEST BUILDERS	162,597	9.07%	310	7.41%	82	1,575	22.52%	248
E: BUY ME A NEW HOME	274,614	15.31%	1,026	24.51%	160	1,191	17.04%	111
F: EMPTY NESTERS	91,740	5.12%	154	3.69%	72	270	3.86%	75
G: UP THE LADDER	274,370	15.30%	1,263	30.17%	197	1,916	27.40%	179
H: HIGH TRADES	51,051	2.85%	263	6.29%	221	271	3.87%	136
I: URBAN LIFE IN SMALL TOWNS	161,120	8.99%	5	0.12%	1	28	0.41%	5
J: JOYFUL COUNTRY	72,301	4.03%	0	0.00%	0	522	7.47%	185
K: RURAL HANDYMEN	29,472	1.64%	0	0.00%	0	0	0.00%	0
L: COMFORTABLE APARTMENT DWELLERS	171,884	9.59%	483	11.54%	120	483	6.91%	72
M: SINGLES	37,108	2.07%	95	2.27%	110	95	1.36%	66
N: NEW CANADIANS	36,424	2.03%	0	0.00%	0	0	0.00%	0
O: RENTERS	15,815	0.88%	0	0.00%	0	0	0.00%	0
P: ONE PARENT FAMILIES	13,003	0.73%	0	0.00%	0	0	0.00%	0
Q: THRIFTY	9,152	0.51%	0	0.00%	0	0	0.00%	0

Table 3-5. Age Breakdown

(Source: FBM & Manifold Data Mining Inc.)

Attribute	Benchmark		Town of Morinville			Morinville Trade Area		
	PR: Alberta, AB							
	value	percent	value	percent	index	value	percent	index
POPULATION AGE GROUP								
Total population by age groups	4,651,538		11,092			19,343		
0-14	834,722	17.95%	2,379	21.45%	119	3,876	20.04%	112
0-4	267,009	5.74%	722	6.51%	113	1,145	5.92%	103
5-9	282,681	6.08%	820	7.39%	122	1,326	6.86%	113
10-14	285,032	6.13%	836	7.54%	123	1,404	7.26%	118
15-64	3,084,077	66.30%	7,153	64.49%	97	12,483	64.54%	97
15-19	276,466	5.94%	735	6.63%	112	1,286	6.65%	112
20-24	281,964	6.06%	537	4.84%	80	1,026	5.30%	87
25-29	307,072	6.60%	674	6.08%	92	1,116	5.77%	87
30-34	350,841	7.54%	864	7.79%	103	1,345	6.95%	92
35-39	369,614	7.95%	971	8.75%	110	1,499	7.75%	97
40-44	347,492	7.47%	895	8.07%	108	1,442	7.46%	100
45-49	304,685	6.55%	677	6.10%	93	1,183	6.12%	93
50-54	281,780	6.06%	554	5.00%	83	1,062	5.49%	91
55-59	275,971	5.93%	584	5.27%	89	1,190	6.15%	104
60-64	288,192	6.20%	662	5.97%	96	1,334	6.90%	111
65 and over	732,739	15.75%	1,560	14.06%	89	2,984	15.43%	98
65-69	251,240	5.40%	551	4.97%	92	1,123	5.81%	108
70-74	186,841	4.02%	383	3.45%	86	785	4.06%	101
75-79	133,072	2.86%	286	2.58%	90	533	2.76%	97
80-84	83,024	1.79%	228	2.06%	115	326	1.68%	94
85 and over	78,561	1.69%	111	1.00%	59	217	1.12%	66
85-89	50,167	1.08%	46	0.42%	39	130	0.67%	62
90-94	22,259	0.48%	28	0.25%	52	52	0.27%	56
95-99	5,465	0.12%	32	0.29%	242	30	0.16%	133
100 and over	670	0.01%	5	0.05%	500	5	0.03%	300
Average age of total population	39.50		37.60		95	38.90		98
Median age of total population	38.70		36.80		95	39.10		101

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

Figure 3-3. Age Breakdown

(Source: Manifold Data Mining Inc.)

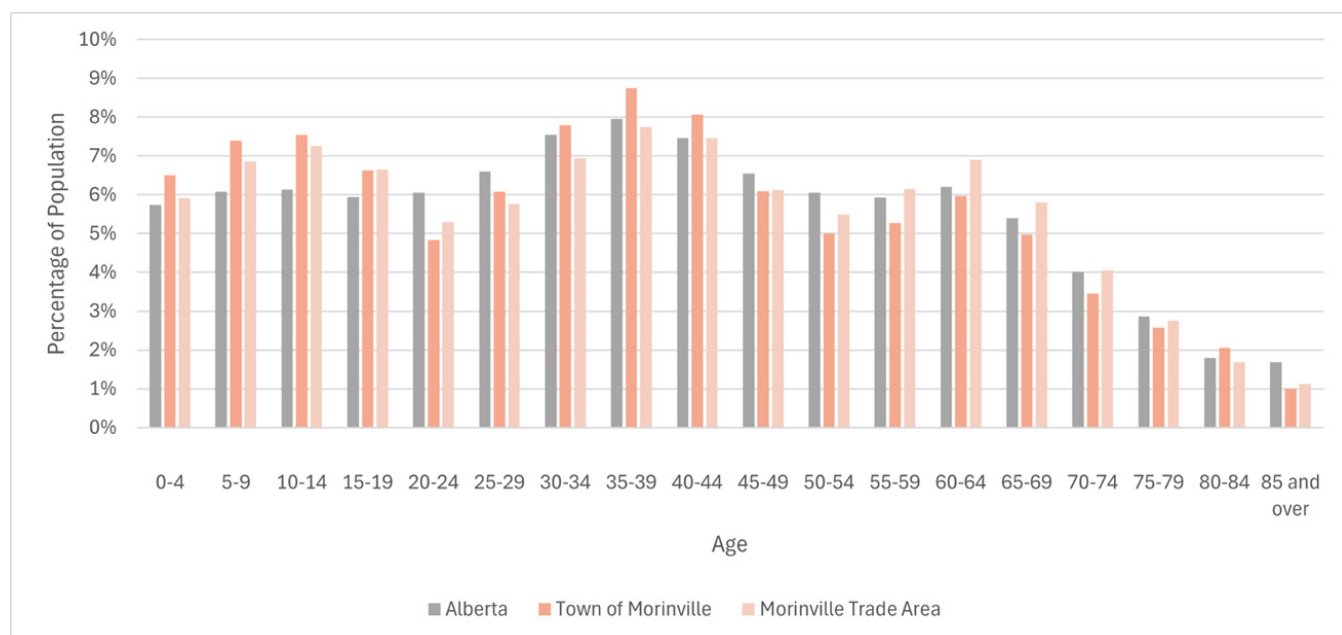


Table 3-6. Household Income Breakdown

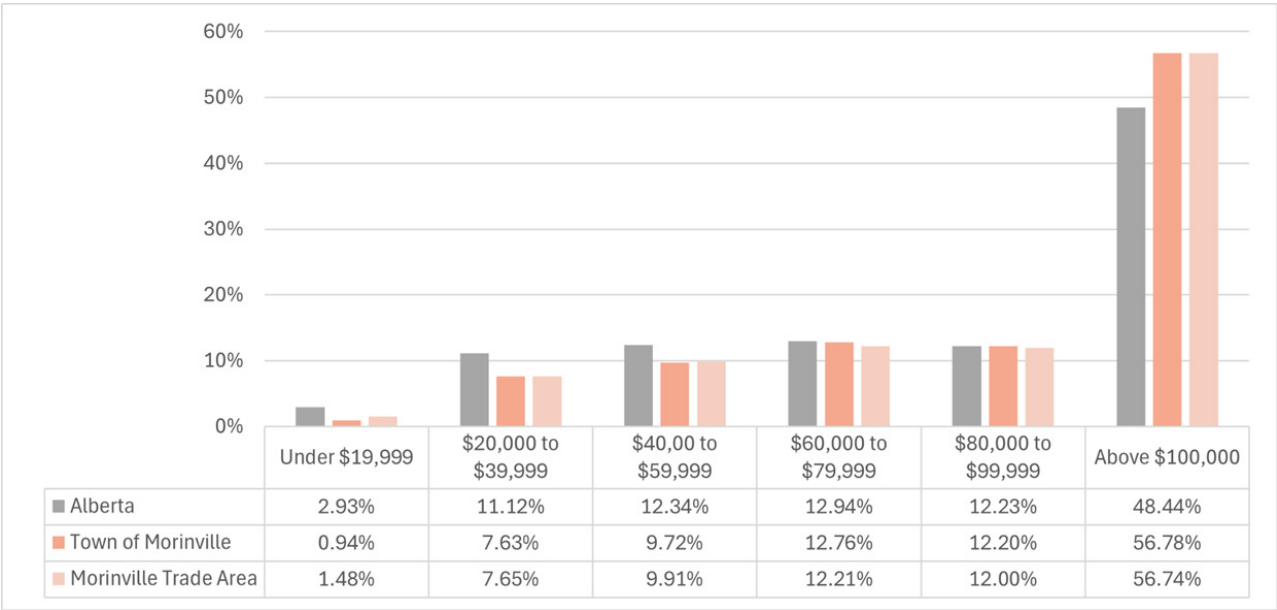
(Source: FBM & Manifold Data Mining Inc.)

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

Attribute	Benchmark		Town of Morinville			Morinville Trade Area		
	PR: Alberta, AB							
	value	percent	value	percent	index	value	percent	index
HOUSEHOLD INCOME								
Total number of households	1,782,214		4,035			6,992		
Average household income \$	\$131,803.00		\$128,599.00		98	\$130,922.00		99
Median household income \$	\$103,851.00		\$119,274.00		115	\$117,138.00		113
Household with income under \$5,000	13,079	0.73%	10	0.25%	34	18	0.26%	36
Household with income \$5,000 to \$9,999	8,791	0.49%	7	0.17%	35	14	0.20%	41
Household with income \$10,000 to \$14,999	11,861	0.67%	0	0.00%	0	26	0.37%	55
Household with income \$15,000 to \$19,999	18,544	1.04%	21	0.52%	50	46	0.65%	63
Household with income \$20,000 to \$24,999	47,057	2.64%	65	1.61%	61	106	1.52%	58
Household with income \$25,000 to \$29,999	53,619	3.01%	65	1.61%	53	118	1.68%	56
Household with income \$30,000 to \$34,999	46,326	2.60%	83	2.06%	79	153	2.18%	84
Household with income \$35,000 to \$39,999	51,195	2.87%	95	2.35%	82	159	2.27%	79
Household with income \$40,000 to \$44,999	56,194	3.15%	89	2.21%	70	164	2.34%	74
Household with income \$45,000 to \$49,999	58,133	3.26%	94	2.33%	71	176	2.52%	77
Household with income \$50,000 to \$59,999	105,625	5.93%	209	5.18%	87	353	5.05%	85
Household with income \$60,000 to \$69,999	115,870	6.50%	249	6.17%	95	414	5.93%	91
Household with income \$70,000 to \$79,999	114,718	6.44%	266	6.59%	102	439	6.28%	98
Household with income \$80,000 to \$89,999	110,012	6.17%	261	6.47%	105	415	5.94%	96
Household with income \$90,000 to \$99,999	107,953	6.06%	231	5.73%	95	424	6.06%	100
Household with income \$100,000 and over	863,238	48.44%	2,291	56.78%	117	3,967	56.74%	117
Household with income \$100,000 to \$124,999	206,288	11.58%	636	15.76%	136	985	14.08%	122
Household with income \$125,000 to \$149,999	179,676	10.08%	551	13.66%	136	904	12.93%	128
Household with income \$150,000 to \$199,999	212,363	11.92%	673	16.68%	140	1,138	16.28%	137
Household with income \$200,000 and over	264,911	14.86%	431	10.68%	72	940	13.45%	91

Figure 3-4. Household Income Breakdown

(Source: Manifold Data Mining Inc.)



3.3 Summary of Employment & Labour

Tables 3-6 & 3-7 provide a summary of the estimated 2023 labour force profile for Morinville's Trade Area. Those 15 years or older who are employed in casual, seasonal or short-term positions (less than 1 year) represent a slightly higher percentage (10.99%) of the Trade Area population compared to the province (9.68%). A slightly lower percentage (6.88%) of workers work from home in the Trade Area compared to the province (9.24%).

The Trade Area has a significantly higher percentage (47.17%) of workers who commute to a different census subdivision (CSD) within their census division (CD) of residence compared with the province (15.54%). Morinville shares a census division with the City of Edmonton and surrounding area. These results suggest many workers commute to Edmonton regularly for work.

Traveling by car, truck or van is the most common commuting mode (82.50%) which is slightly higher than the province (73.83%). Commutes by public transit are significantly lower (0.74%) within the Trade Area compared to the province (4.74%).

As shown in **Table 3-8**, the major industries within the Morinville Trade Area are:

- *Construction (1,609 people / 14.58%);*
- *Health care and social assistance (1,405 / 12.72%); and*
- *Public administration (1,294 / 11.72%)*

Public administration in particular is significantly higher than the province (5.19%) which reflects the presence of Town administration, Sturgeon County Centre and Alexander First Nation's Band Office within the Trade Area. Notably, employment in retail trade is on par with the province (10.34% in the Trade Area / 11.22% in the province) while employment in accommodations and food services is slightly lower at 3.13% compared to the province at 5.81%. This may be an area of potential growth for Morinville.

Prominent occupations within the Trade Area include:

- *Trades, transport and equipment operators and related occupations (3,098 people / 28.07%)*
- *Sales and service occupations (1,994 people / 18.07%)*
- *Business, finance, and administration occupations (1,752 / 15.87%)*

Unsurprisingly, **Table 3-7** confirms that a very large share of Morinville's Trade Area residents commute to "a different census subdivision within the census division of residence" at 47%. Much of this workforce commutes to St. Albert or elsewhere in the Edmonton Metro Region.

Table 3-7. Labour Force & Commuting

(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		Town of Morinville			Morinville Trade Area		
	PR: Alberta, AB		value	percent	index	value	percent	index
	value	percent						
CLASS OF WORKER								
Total labour force 15 years and over by class of worker	2,666,911		6,331			11,038		
Class of worker - Not applicable	79,692	2.99%	116	1.83%	61	209	1.90%	64
All classes of worker	2,587,219	97.01%	6,216	98.18%	101	10,829	98.10%	101
Employees	2,184,693	81.92%	5,548	87.63%	107	9,208	83.42%	102
Permanent position	1,816,468	68.11%	4,540	71.71%	105	7,534	68.26%	100
Temporary position	368,226	13.81%	1,008	15.92%	115	1,673	15.16%	110
Fixed term (1 year or more)	110,099	4.13%	319	5.04%	122	461	4.17%	101
Casual, seasonal or short-term position (less than 1 year)	258,127	9.68%	690	10.90%	113	1,213	10.99%	114
Self-employed	402,526	15.09%	668	10.55%	70	1,621	14.69%	97
PLACE OF WORK								
Total employed labour force 15 years and over by place of work status	2,503,441		5,958			10,448		
At home	246,445	9.24%	345	5.45%	59	759	6.88%	74
Outside Canada	6,609	0.25%	17	0.27%	108	19	0.17%	68
No fixed workplace address	443,845	16.64%	1,222	19.30%	116	2,094	18.97%	114
Usual place of work	1,806,542	67.74%	4,373	69.07%	102	7,576	68.63%	101
COMMUTING DESTINATION								
Total employed labour force 15 years and over with a usual place of work commuting destination	1,806,542		4,373			7,576		
Commute within census subdivision (CSD) of residence	1,306,886	49.00%	1,222	19.30%	39	1,858	16.83%	34
Commute to a different census subdivision (CSD) within census division (CD) of residence	414,408	15.54%	2,950	46.60%	300	5,207	47.17%	304
Commute to a different census subdivision (CSD) and census division (CD) within province or territory of residence	70,616	2.65%	187	2.95%	111	497	4.50%	170
Commute to a different province or territory	14,633	0.55%	14	0.22%	40	14	0.13%	24
MODE OF TRANSPORTATION								
Total employed labour force 15 years and over who commute to work by mode of transportation	2,250,388		5,596			9,670		
Car, truck or van	1,968,890	73.83%	5,231	82.63%	112	9,107	82.50%	112
Car, truck, van, as driver	1,843,967	69.14%	4,969	78.49%	114	8,737	79.15%	114
Car, truck, van, as passenger	124,923	4.68%	262	4.14%	88	370	3.35%	72
Public transit	126,360	4.74%	63	1.00%	21	81	0.74%	16
Walked	89,201	3.35%	171	2.70%	81	269	2.44%	73
Bicycle	14,910	0.56%	17	0.27%	48	17	0.15%	27
Other method	51,027	1.91%	114	1.80%	94	195	1.77%	93

Table 3-8. Labour Force Industry & 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		Town of Morinville			Morinville Trade Area		
	PR: Alberta, AB							
	value	percent	value	percent	index	value	percent	index
LABOUR FORCE INDUSTRY								
Total labour force population aged 15+ years - North American Industry Classification System (NAICS) 2017	2,666,911		6,331			11,038		
Industry - not applicable	79,692	2.99%	116	1.83%	61	209	1.90%	64
All industries	2,587,219	97.01%	6,216	98.18%	101	10,829	98.10%	101
11 Agriculture, forestry, fishing, and hunting	76,906	2.88%	65	1.03%	36	446	4.04%	140
21 Mining, quarrying, and oil and gas extraction	128,887	4.83%	212	3.35%	69	387	3.51%	73
22 Utilities	23,738	0.89%	55	0.87%	98	92	0.83%	93
23 Construction	248,409	9.31%	916	14.47%	155	1,609	14.58%	157
31-33 Manufacturing	138,533	5.20%	302	4.77%	92	565	5.12%	98
41 Wholesale trade	81,098	3.04%	232	3.67%	121	485	4.39%	144
44-45 Retail trade	299,104	11.22%	724	11.44%	102	1,141	10.34%	92
48-49 Transportation and warehousing	149,929	5.62%	322	5.09%	91	643	5.83%	104
51 Information and cultural industries	30,769	1.15%	17	0.27%	23	35	0.32%	28
52 Finance and insurance	77,096	2.89%	144	2.28%	79	231	2.09%	72
53 Real estate and rental and leasing	42,822	1.61%	74	1.17%	73	102	0.92%	57
54 Professional, scientific, and technical services	206,433	7.74%	213	3.36%	43	426	3.85%	50
55 Management of companies and enterprises	3,940	0.15%	0	0.00%	0	0	0.00%	0
56 Administrative and support, waste management and remediation services	105,824	3.97%	210	3.32%	84	327	2.97%	75
61 Educational services	174,157	6.53%	336	5.31%	81	655	5.94%	91
62 Health care and social assistance	337,388	12.65%	891	14.07%	111	1,405	12.72%	101
71 Arts, entertainment, and recreation	47,147	1.77%	56	0.89%	50	100	0.91%	51
72 Accommodation and food services	155,048	5.81%	190	3.00%	52	346	3.13%	54
81 Other services (except public administration)	121,523	4.56%	318	5.02%	110	540	4.89%	107
91 Public administration	138,471	5.19%	938	14.82%	286	1,294	11.72%	226
OCCUPATION								
Total labour force 15 years and over by occupation	2,666,911		6,331			11,038		
Occupation - not applicable	79,692	2.99%	116	1.83%	61	209	1.90%	64
All occupations	2,587,219	97.01%	6,216	98.18%	101	10,829	98.10%	101
0 Management occupations	24,427	0.92%	49	0.77%	84	92	0.84%	91
1 Business, finance, and administration occupations	436,463	16.37%	1,038	16.40%	100	1,752	15.87%	97
2 Natural and applied sciences and related occupations	210,767	7.90%	243	3.84%	49	470	4.25%	54
3 Health occupations	211,314	7.92%	539	8.51%	107	865	7.84%	99
4 Occupations in education, law and social, community and government services	287,317	10.77%	983	15.53%	144	1,479	13.40%	124
5 Occupations in art, culture, recreation, and sport	57,155	2.14%	72	1.14%	53	118	1.07%	50
6 Sales and service occupations	631,812	23.69%	1,203	19.00%	80	1,994	18.07%	76
7 Trades, transport and equipment operators and related occupations	518,146	19.43%	1,692	26.73%	138	3,098	28.07%	144
8 Natural resources, agriculture, and related production occupations	114,520	4.29%	186	2.94%	69	634	5.74%	134
9 Occupations in manufacturing and utilities	95,298	3.57%	211	3.33%	93	327	2.96%	83

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 2023 year end data, extrapolated for the year 2024 as a base year. 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 3-9** 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 basins for each of the 22 categories. **Table 3-9, Table 3-10, and Table 3-11** illustrate a spending profile for the Town of Morinville and Morinville’s broader retail trade area. Additional miscellaneous inflow is also presented in **Table 3-12**.

*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 Town of Morinville

The Town of Morinville has a total aggregate retail spending for 2024 estimated at \$201.2 million excluding health care and auto. Grocery, Convenience and Specialty Foods represent the highest household spending category at \$13,025 and Household spending on Auto/RV/Motorsports was the second highest spending category (\$12,048).

Amongst the four major merchandise categories shown in **Figure 3-5**, Grocery & Convenience account for 40% of the total non-auto spending potential, while Comparison /DSTM Merchandise accounts for 42%.

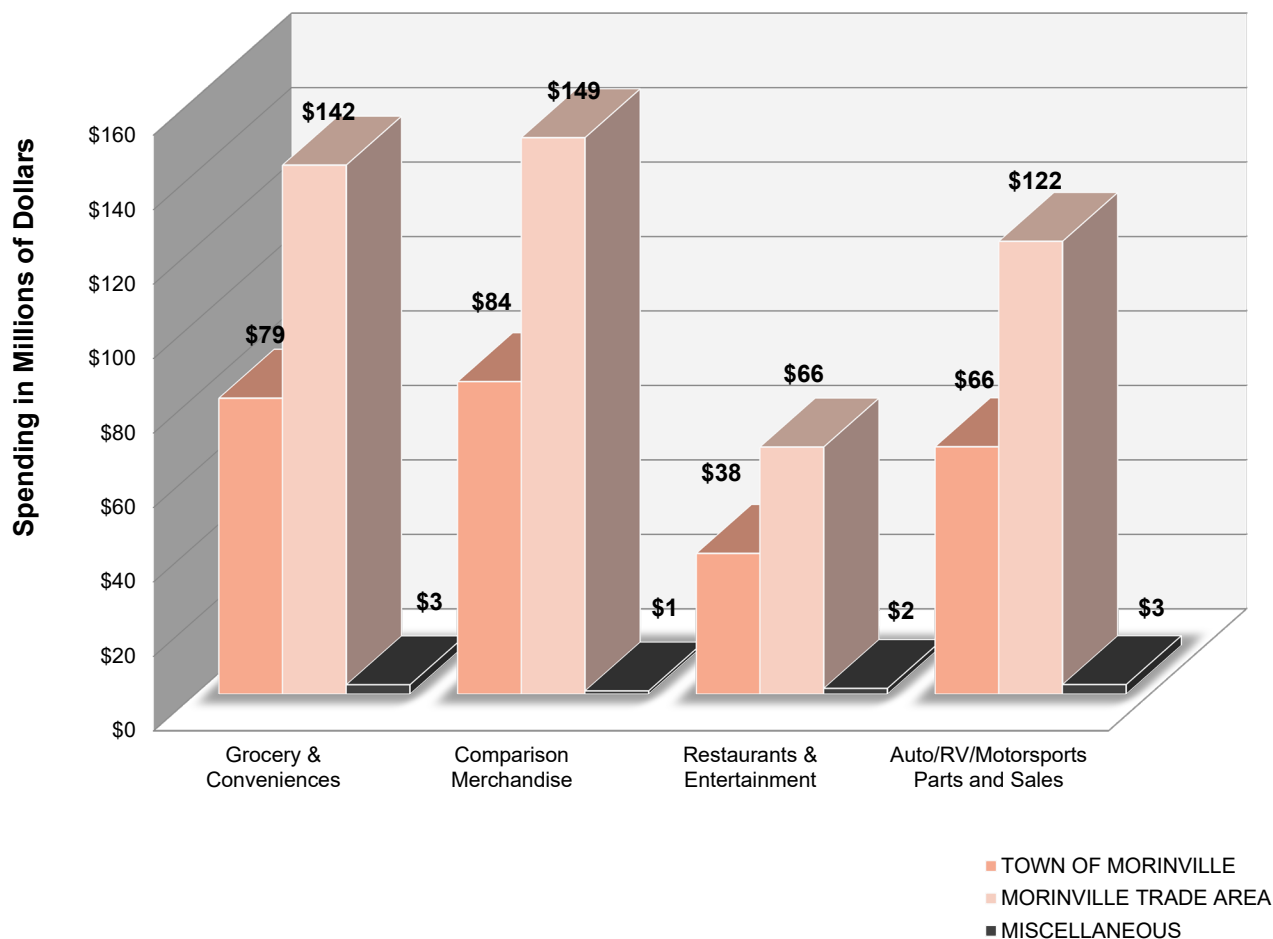
The retail-specific spending is expected is expected to increase to \$227.9 million by 2029 and \$244.9 million by 2034, representing a 7% total increase in spending over each of the 5-year periods 2024 to 2029 and 2029 to 2034.

3.4.2 Morinville Trade Area (incl town)

Total aggregate retail spending for the Morinville retail trade area 2024 is estimated \$357.9 million excluding health care and auto. Grocery, Convenience and Specialty Foods represent the highest household spending category at \$13,889 and Household spending on Auto/RV/Motorsports was the second highest spending category (\$12,779).

Figure 3-5. Trade Area Spending 2024 by Broad Merchandise Category

(Source: Manifold Data Mining Inc. & FBM)



Amongst the four major merchandise categories shown in **Figure 3-5**, Grocery & Convenience account for 40% of the total non-auto spending potential, while Comparison /DSTM Merchandise accounts for 42%.

The retail-specific spending is expected to increase to \$398.5 million by 2029 and \$442.2 million by 2034, representing a 11 % total increase in spending over each of the 5-year periods 2024 to 2029 and 2029 to 2034.

Table 3-9. Trade Area Retail Spending 2024 (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		2024		2024	
		TOWN OF MORINVILLE Per Household Retail Spending	TOWN OF MORINVILLE Aggregate Retail Spending	MORINVILLE TRADE AREA Per Household Retail Spending	MORINVILLE TRADE AREA Aggregate Retail Spending
Convenience & Day-to-Day Goods/Services	Grocery & Convenience	\$13,025	\$52,556,944	\$13,389	\$93,616,598
	Pharmacy	\$1,069	\$4,314,077	\$1,171	\$8,184,971
	Alcohol & Tobacco	\$923	\$3,723,591	\$954	\$6,669,495
	Personal Services	\$4,681	\$18,886,451	\$4,808	\$33,619,667
	Health Care & Medical Services	\$1,177	\$4,747,541	\$1,265	\$8,845,447
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	\$3,747	\$15,121,090	\$3,838	\$26,836,794
	Jewelry	\$256	\$1,034,380	\$266	\$1,860,027
	Beauty & Personal Care	\$2,591	\$10,455,976	\$2,609	\$18,245,326
	Home Furniture & Décor	\$954	\$3,850,076	\$984	\$6,878,058
	Appliances & Electronics	\$3,291	\$13,278,116	\$3,372	\$23,579,323
	Home Improvement & Gardening	\$4,544	\$18,335,746	\$4,808	\$33,617,987
	Books & Media	\$782	\$3,153,514	\$800	\$5,597,077
	Sporting Goods	\$1,607	\$6,482,353	\$1,590	\$11,114,528
	Toys & Hobbies	\$1,161	\$4,683,211	\$1,133	\$7,919,580
	Specialty Retail	\$1,870	\$7,546,301	\$1,975	\$13,812,564
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$3,402	\$13,726,275	\$3,474	\$24,289,597
	Restaurants & Pubs	\$4,567	\$18,426,691	\$4,585	\$32,059,296
	Arts & Entertainment	\$710	\$2,863,317	\$728	\$5,093,402
	Fitness & Leisure	\$688	\$2,776,346	\$705	\$4,932,465
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$4,416	\$17,819,952	\$4,613	\$32,253,564
	Auto/RV/Motorsports Dealership	\$12,048	\$48,615,133	\$12,779	\$89,351,976
	Auto Fuel	\$2,633	\$10,624,074	\$2,737	\$19,138,986
TOTAL CATEGORIES		\$70,142	\$283,021,154	\$72,584	\$507,516,729
TOTAL (excluding Health Care & Auto)		\$49,867	\$201,214,455	\$51,190	\$357,926,755

Table 3-10. Trade Area Retail Spending Potential 2029

(Source: Manifold Data Mining Inc. & FBM)

Retail Spending by Merchandise Category		2029		2029	
		TOWN OF MORINVILLE Per Household Retail Spending	TOWN OF MORINVILLE Aggregate Retail Spending	MORINVILLE TRADE AREA Per Household Retail Spending	MORINVILLE TRADE AREA Aggregate Retail Spending
Convenience & Day-to-Day Goods/Services	Grocery & Convenience	\$13,690	\$59,536,438	\$14,072	\$104,230,408
	Pharmacy	\$1,124	\$4,886,980	\$1,230	\$9,112,945
	Alcohol & Tobacco	\$970	\$4,218,079	\$1,003	\$7,425,651
	Personal Services	\$4,919	\$21,394,547	\$5,054	\$37,431,307
	Health Care & Medical Services	\$1,237	\$5,378,008	\$1,330	\$9,848,302
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	\$3,939	\$17,129,151	\$4,034	\$29,879,424
	Jewelry	\$269	\$1,171,745	\$280	\$2,070,908
	Beauty & Personal Care	\$2,724	\$11,844,516	\$2,743	\$20,313,895
	Home Furniture & Décor	\$1,003	\$4,361,361	\$1,034	\$7,657,860
	Appliances & Electronics	\$3,459	\$15,041,432	\$3,544	\$26,252,636
	Home Improvement & Gardening	\$4,776	\$20,770,709	\$5,053	\$37,429,436
	Books & Media	\$821	\$3,572,296	\$841	\$6,231,647
	Sporting Goods	\$1,688	\$7,343,201	\$1,671	\$12,374,641
	Toys & Hobbies	\$1,220	\$5,305,135	\$1,190	\$8,817,465
	Specialty Retail	\$1,966	\$8,548,440	\$2,076	\$15,378,567
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$3,575	\$15,549,106	\$3,651	\$27,043,438
	Restaurants & Pubs	\$4,800	\$20,873,731	\$4,819	\$35,694,028
	Arts & Entertainment	\$746	\$3,243,561	\$766	\$5,670,868
	Fitness & Leisure	\$723	\$3,145,041	\$741	\$5,491,685
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$4,642	\$20,186,418	\$4,848	\$35,910,322
	Auto/RV/Motorsports Dealership	\$12,663	\$55,071,158	\$13,431	\$99,482,283
	Auto Fuel	\$2,767	\$12,034,937	\$2,877	\$21,308,874
TOTAL CATEGORIES		\$73,719	\$320,605,992	\$76,287	\$565,056,591
TOTAL (excluding Health Care & Auto)		\$52,411	\$227,935,470	\$53,801	\$398,506,809

Table 3-11. Trade Area Retail Spending Potential 2034

(Source: Manifold Data Mining Inc. & FBM)

Retail Spending by Merchandise Category		2034		2034	
		TOWN OF MORINVILLE Per Household Retail Spending	TOWN OF MORINVILLE Aggregate Retail Spending	MORINVILLE TRADE AREA Per Household Retail Spending	MORINVILLE TRADE AREA Aggregate Retail Spending
Convenience & Day-to-Day Goods/Services	Grocery & Convenience	\$13,690	\$63,862,378	\$14,790	\$115,655,346
	Pharmacy	\$1,124	\$5,242,070	\$1,293	\$10,111,836
	Alcohol & Tobacco	\$970	\$4,524,566	\$1,054	\$8,239,594
	Personal Services	\$4,919	\$22,949,083	\$5,311	\$41,534,240
	Health Care & Medical Services	\$1,237	\$5,768,776	\$1,397	\$10,927,798
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	\$3,939	\$18,373,761	\$4,240	\$33,154,578
	Jewelry	\$269	\$1,256,884	\$294	\$2,297,906
	Beauty & Personal Care	\$2,724	\$12,705,143	\$2,882	\$22,540,548
	Home Furniture & Décor	\$1,003	\$4,678,259	\$1,087	\$8,497,256
	Appliances & Electronics	\$3,459	\$16,134,348	\$3,725	\$29,130,249
	Home Improvement & Gardening	\$4,776	\$22,279,917	\$5,311	\$41,532,164
	Books & Media	\$821	\$3,831,861	\$884	\$6,914,713
	Sporting Goods	\$1,688	\$7,876,760	\$1,756	\$13,731,055
	Toys & Hobbies	\$1,220	\$5,690,608	\$1,251	\$9,783,968
	Specialty Retail	\$1,966	\$9,169,573	\$2,182	\$17,064,248
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$3,575	\$16,678,910	\$3,837	\$30,007,732
	Restaurants & Pubs	\$4,800	\$22,390,425	\$5,065	\$39,606,534
	Arts & Entertainment	\$746	\$3,479,240	\$805	\$6,292,465
	Fitness & Leisure	\$723	\$3,373,561	\$779	\$6,093,641
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$4,642	\$21,653,171	\$5,095	\$39,846,536
	Auto/RV/Motorsports Dealership	\$12,663	\$59,072,650	\$14,116	\$110,386,769
	Auto Fuel	\$2,767	\$12,909,401	\$3,024	\$23,644,590
TOTAL CATEGORIES		\$73,719	\$343,901,346	\$80,178	\$626,993,765
TOTAL (excluding Health Care & Auto)		\$52,411	\$244,497,349	\$56,546	\$442,188,072

3.4.3 Miscellaneous Inflow

Miscellaneous inflow spending accounts for a small percentage (1.5%) 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 2024 was \$4.9 million and is expected to increase to \$5.5 million by 2029 and \$6.1 million by 2034.

Table 3-12. Miscellaneous Inflow Retail Spending: 2024, 2029, and 2034

(Source: Manifold Data Mining Inc. & FBM)

Miscellaneous Inflow Factor		Retail Spending by Merchandise Category		2024	2029	2034
				MORINVILLE Misc Inflow Spending	MORINVILLE Misc Inflow Spending	MORINVILLE Misc Inflow Spending
Convenience & Day-to-Day Goods/Services	2.0%	Grocery & Convenience		\$1,872,332	\$2,084,608	\$2,313,107
	2.0%	Pharmacy		\$163,699	\$182,259	\$202,237
	2.0%	Alcohol & Tobacco		\$133,390	\$148,513	\$164,792
	1.0%	Personal Services		\$336,197	\$374,313	\$415,342
	0.0%	Health Care & Medical Services		\$0	\$0	\$0
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	0.5%	Fashion & Accessories		\$134,184	\$149,397	\$165,773
	0.0%	Jewelry		\$0	\$0	\$0
	0.5%	Beauty & Personal Care		\$91,227	\$101,569	\$112,703
	1.0%	Home Furniture & Décor		\$68,781	\$76,579	\$84,973
	0.0%	Appliances & Electronics		\$0	\$0	\$0
	1.0%	Home Improvement & Gardening		\$336,180	\$374,294	\$415,322
	0.0%	Books & Media		\$0	\$0	\$0
	0.5%	Sporting Goods		\$55,573	\$61,873	\$68,655
	0.5%	Toys & Hobbies		\$39,598	\$44,087	\$48,920
	1.0%	Specialty Retail		\$138,126	\$153,786	\$170,642
Leisure, Recreation & Entertainment Goods/Services	5.0%	Quick Service F&B		\$1,214,480	\$1,352,172	\$1,500,387
	1.0%	Restaurants & Pubs		\$320,593	\$356,940	\$396,065
	0.0%	Arts & Entertainment		\$0	\$0	\$0
	0.0%	Fitness & Leisure		\$0	\$0	\$0
Automotive Goods (excluding repair)	1.0%	Auto Parts & Accessories		\$322,536	\$359,103	\$398,465
	2.5%	Auto/RV/Motorsports Dealership		\$2,233,799	\$2,487,057	\$2,759,669
	1.0%	Auto Fuel		\$191,390	\$213,089	\$236,446
1.5% TOTAL RETAIL CATEGORIES ONLY				\$7,652,083	\$8,519,640	\$9,453,498
TOTAL (excluding Health Care & Auto)				\$4,904,358	\$5,460,391	\$6,058,917



4.0 Commercial Supply

4.1 Introduction

This section will provide a detailed inventory of the retail inventory and business mix that comprises the current commercial market in Morinville, which serves as the core shopping and service centre for 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 identification of potential types of tenants and/or merchandise categories for which Morinville could be considered a compatible market for expansion or attraction.

4.2 Market Overview

FBM documented Morinville's existing retail inventory through fieldwork conducted in 2024. Various aspects of Morinville's retail stock were recorded including business names, addresses, merchandise categories, estimated unit sizes, vacancies, and North American Industry Classification System (NAICS) codes.

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

Morinville's retail inventory is primarily located along 100 Avenue and 100 Street, and has been grouped into three nodes (districts):

- *Retail district 1: 100 Avenue*
- *Retail district 2: 100 Street (north of railway)*
- *Retail district 3: southern area*

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 Morinville is summarized in **Tables 4-1 & 4-2** and **Figures 4-1 to 4-4**.

The summary of the current inventory illustrates a total ground floor commercial space of 470,372 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 274,792 sf performing at a reasonably healthy estimate of \$350 per sf.

4.4 Overall Retail Inventory by Category

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

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

1. Grocery, Convenience & Specialty Foods (75,799 sf)
2. Home Improvement & Gardening (34,735 sf)
3. Limited Service F&B (34,111sf)
4. Full Service F&B (29,418 sf)
5. Alcohol, Tobacco & Cannabis (25,048 sf)

On a relative scale, the provision of Alcohol, Tobacco & Cannabis is quite high at 25,048 sf, while categories such as Home Furnishings & Decor, Sporting Goods, and Toys have a much lower representation, even if some of these goods are offered in limited volume at dollar stores.

Mix of Local vs Brands

For Retail businesses specifically, as summarized in **Table 4-2** Morinville has a mix of 69% local businesses to 31% in terms of the overall store count and a mix of 51% local to 49% branded in terms of the floorspace. This ratio is higher for branded than in comparable communities and suggests that the culture of local independents may not be as healthy and could possibly be a direction for establishing a shop local program or incubator program to attract local entrepreneurs.

With the relative proximity and strength of St. Albert, the pull of brands is strong, but in a smaller local community, there should be a focus on trying to provide an alternative to the brands and that often takes the form of strong local independent businesses.

The overall competitiveness of St. Albert, particularly in its north end will mean that Morinville's trading region will likely not expand geographically. That does not however preclude the potential and need for Morinville to strengthen its place within and for its existing and future resident base. A primary focus should be placed on retaining more of the trade area resident expenditure on the Morinville retail environment.

(Source: FBM)

Estimated Retail Sales Productivity (\$/sf) **CA\$350**

(Source: FBM)

Avg Local Size 2,458
Avg Branded Size 5,180

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

(Source: FBM)

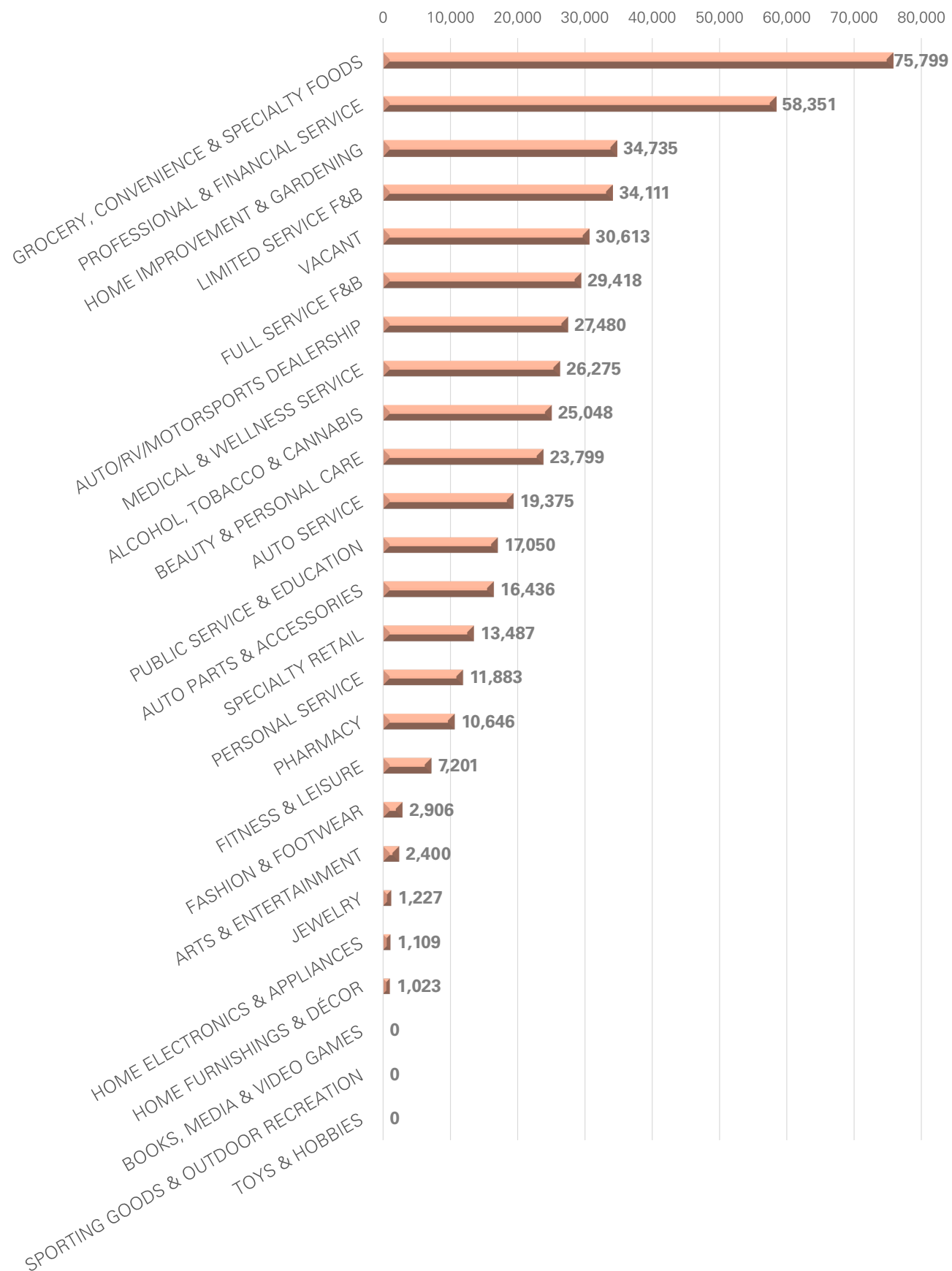
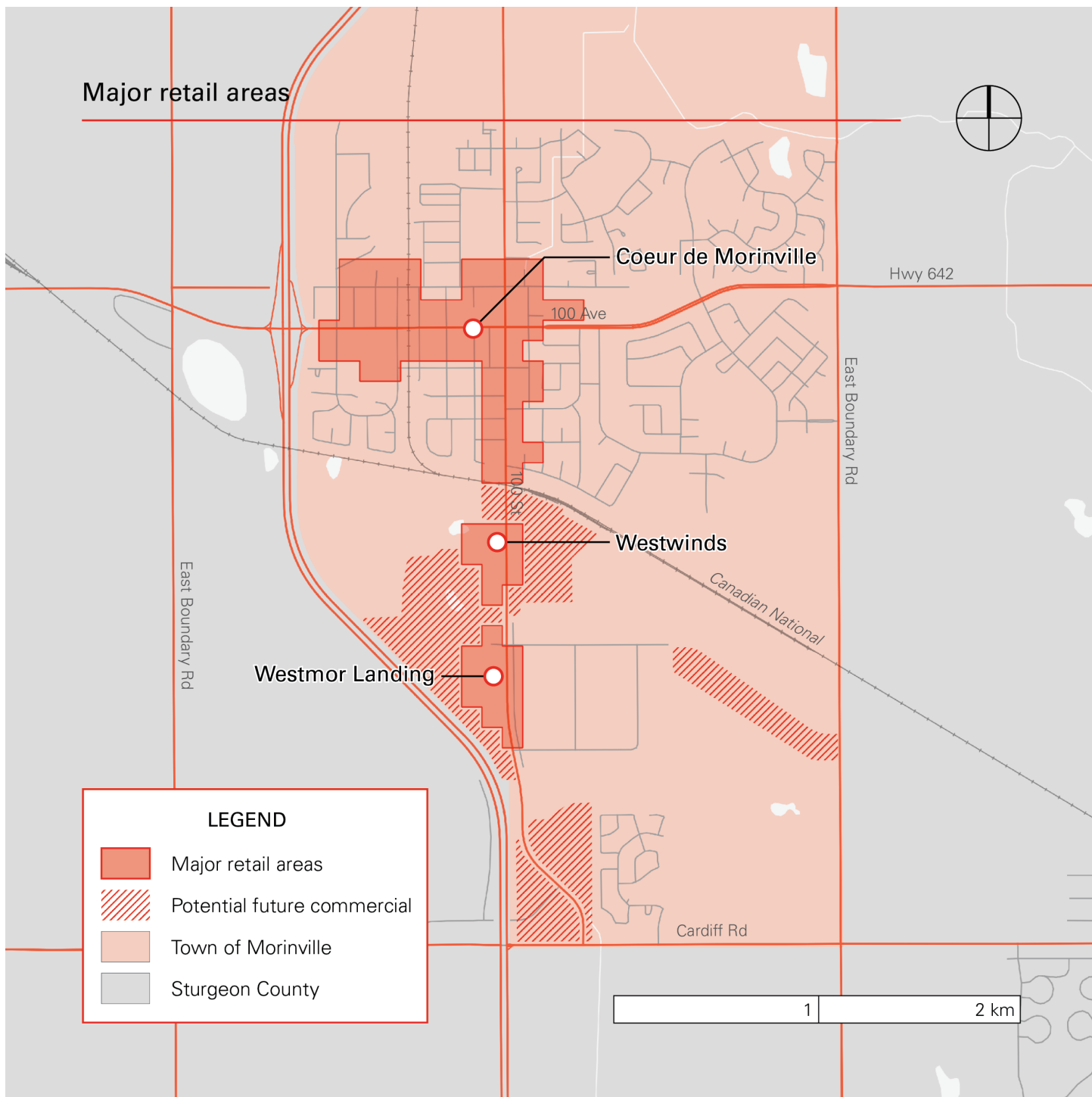


Figure 4-2. Morinville Commercial Nodes

(Source: Google Maps, edited by FBM)



4.5 Retail Inventory By Node

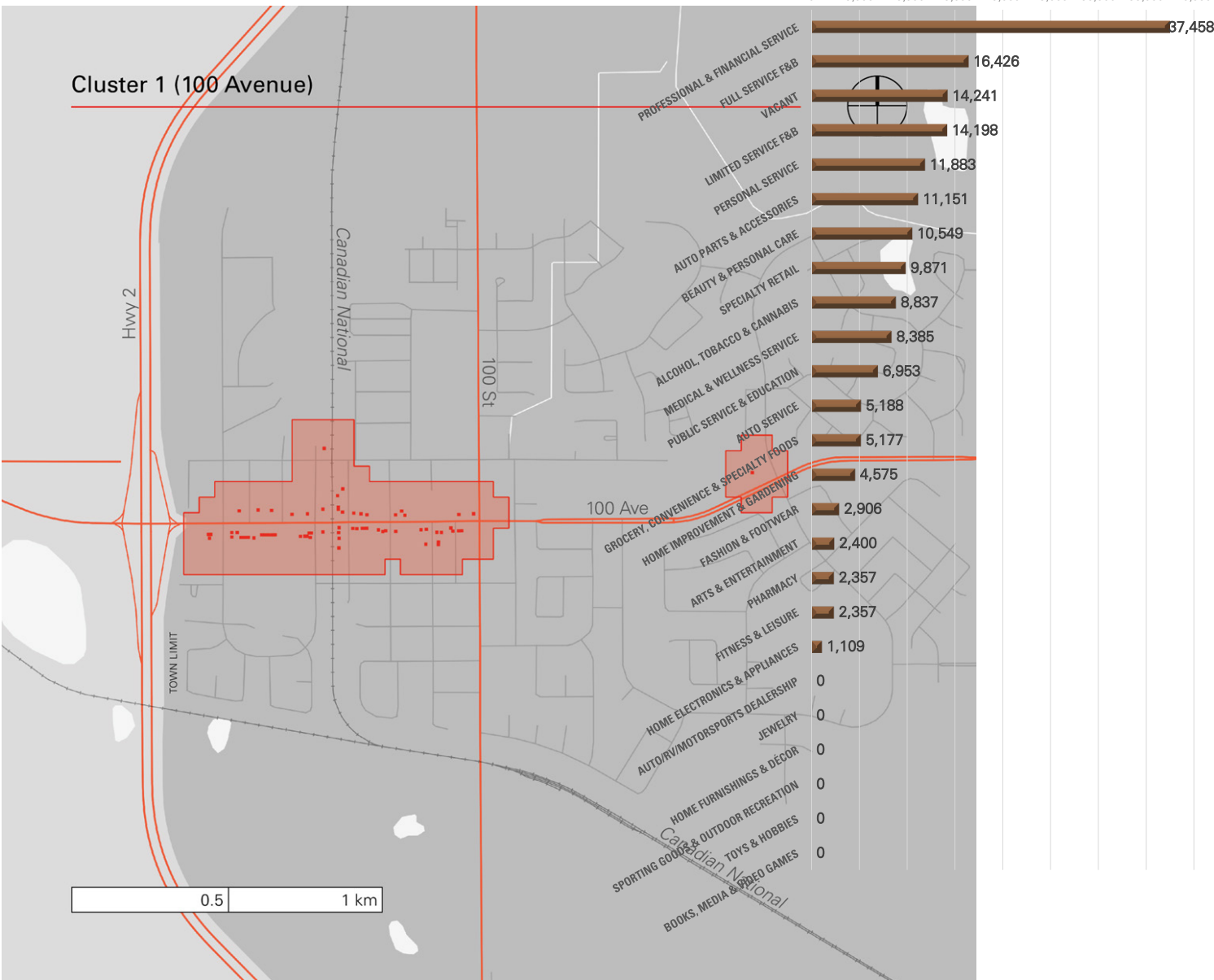
District profile (1) – 100 Avenue

Morinville’s traditional commercial centre is 100 Ave., home to mainstreet retail as well as important civic buildings (including the Morinville Civic Hall and Community Library) and public spaces.

Morinville’s Municipal Development Plan posits that future growth along the 100 Ave. corridor would likely be to the east, since Highway 2 acts as a barrier to the west. There are also opportunities for intensification in this area, and the municipality’s Economic Development Action Plan anticipates some of this will take the form of mixed-use (residential-commercial) development.

Figure 4-3. Morinville Commercial Node: 100th Avenue

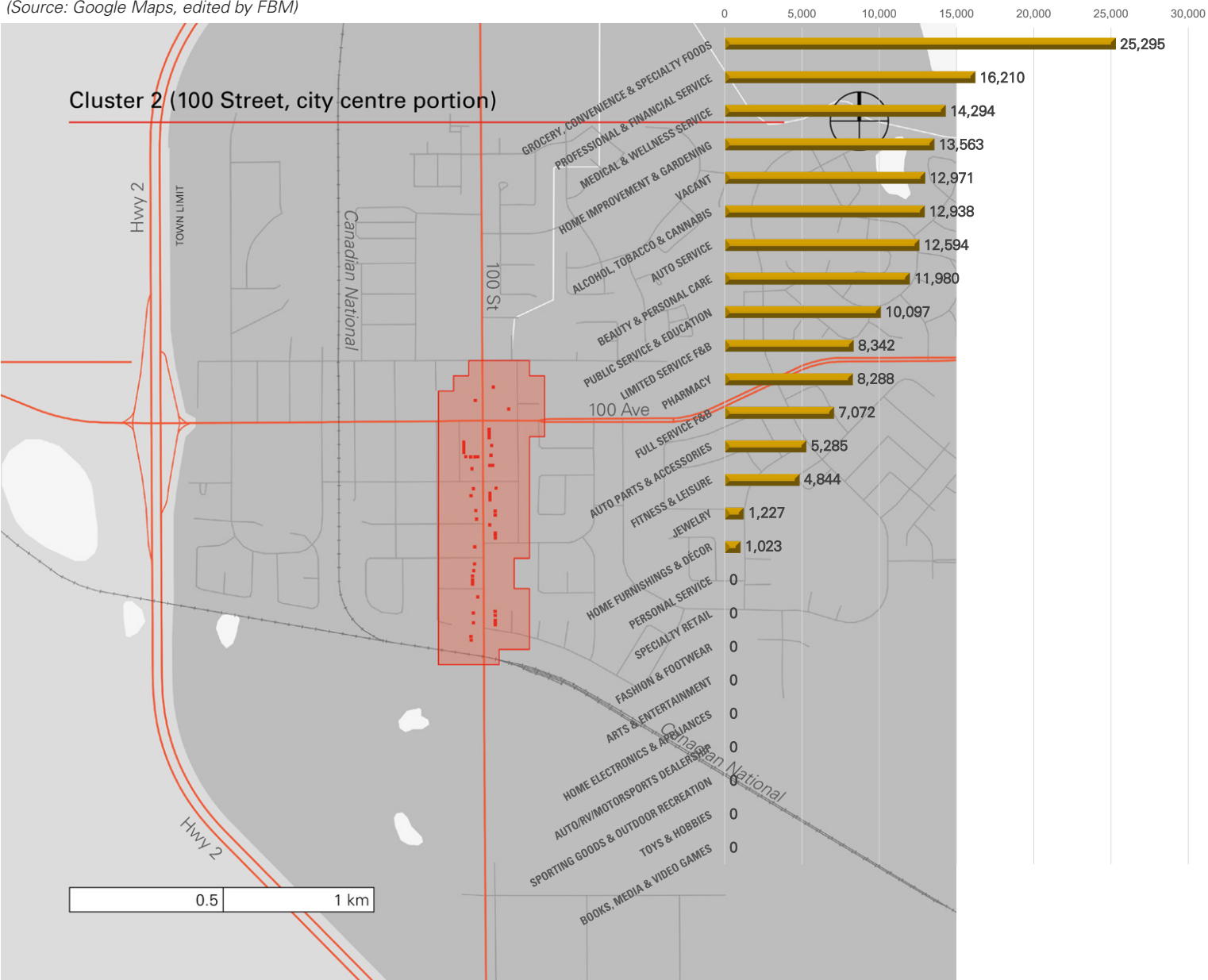
(Source: Google Maps, edited by FBM)



For a downtown/main street area, this mix represents a very healthy profile that caters well to the local trade area demographics and mix of surrounding non-retail components.

Figure 4-4. Morinville Commercial Node: 100 Street

(Source: Google Maps, edited by FBM)



District profile (2) – 100 Street (central portion)

Morinville also has a concentration of retail along its principal north-south axis, 100 St. The intersection of 100 Avenue and 100 Street effectively anchors the community and while this node is profiled as part of 100 Street, part of this node could equally be considered critical to the 100 Avenue mix.

With an estimated 166,023 sf of retail space, the buildings along 100 St. tend to be set back farther from the property line, giving the corridor a different character compared with 100 Ave., which is more of a traditional main street. 100 St. is home to many businesses that fulfill everyday needs, including a Sobeys, drug stores, beauty salons, medical offices, quick-service food outlets, and a bank.

The Top retail categories (excluding Professional &

Financial Services and Auto) in terms of overall retail floor space are:

1. Grocery, Convenience & Specialty Foods (25,295 sf)
2. Home Improvement & Gardening (13,563 sf)
3. Alcohol, Tobacco & Cannabis (12,938 sf)
4. Beauty & Personal Care (11,980 sf)
5. Limited Service F&B (8,342 sf)

As with 100 Avenue, 100 Street is a well-traveled vehicle corridor that has a number of critical non-retail street facing businesses most notably in the Professional & Financial Service Sectors as well as Medical & Wellness, which all work well together.

Figure 4-5. Morinville Commercial Node: Southern Area

(Source: Google Maps, edited by FBM)

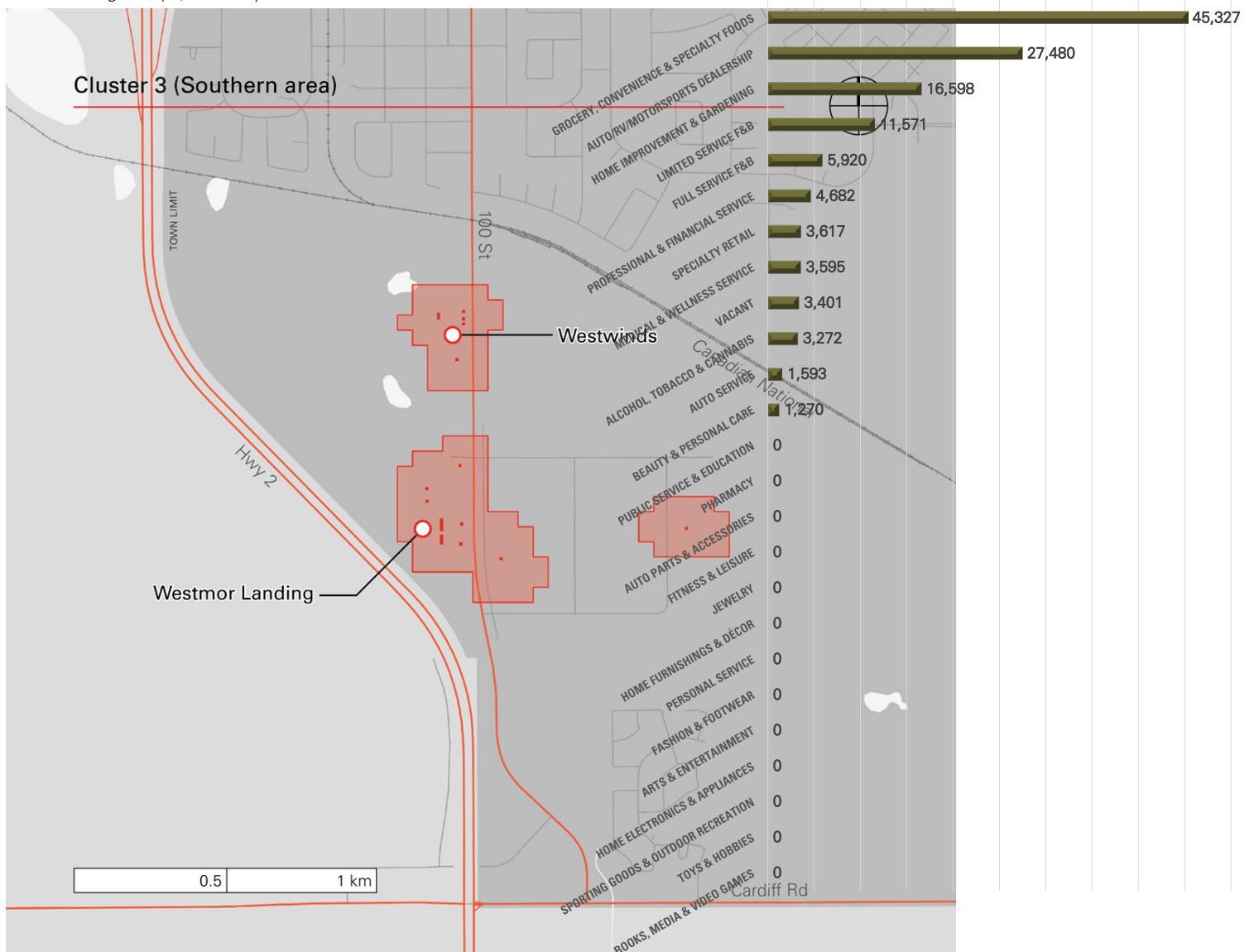


Table 4-3. Morinville Retail Mix Summary - By Node

(Source: FBM)

MERCHANDISE CATEGORY	100 AVENUE FLOORSPACE (sq. ft.)	100 AVENUE MIX (%)	100 STREET FLOORSPACE (sq. ft.)	100 STREET MIX (%)	SOUTH NODE FLOORSPACE (sq. ft.)	SOUTH NODE MIX (%)
GROCERY, CONVENIENCE & SPECIALTY FOODS	5,177	2.9%	25,295	15.2%	45,327	35.3%
AUTO/RV/MOTORSPORTS DEALERSHIP	0	0.0%	0	0.0%	27,480	21.4%
HOME IMPROVEMENT & GARDENING	4,575	2.6%	13,563	8.2%	16,598	12.9%
LIMITED SERVICE F&B	14,198	8.1%	8,342	5.0%	11,571	9.0%
FULL SERVICE F&B	16,426	9.3%	7,072	4.3%	5,920	4.6%
PROFESSIONAL & FINANCIAL SERVICE	37,458	21.3%	16,210	9.8%	4,682	3.6%
SPECIALTY RETAIL	9,871	5.6%	0	0.0%	3,617	2.8%
MEDICAL & WELLNESS SERVICE	8,385	4.8%	14,294	8.6%	3,595	2.8%
VACANT	14,241	8.1%	12,971	7.8%	3,401	2.7%
ALCOHOL, TOBACCO & CANNABIS	8,837	5.0%	12,938	7.8%	3,272	2.5%
AUTO SERVICE	5,188	2.9%	12,594	7.6%	1,593	1.2%
BEAUTY & PERSONAL CARE	10,549	6.0%	11,980	7.2%	1,270	1.0%
PUBLIC SERVICE & EDUCATION	6,953	4.0%	10,097	6.1%	0	0.0%
PHARMACY	2,357	1.3%	8,288	5.0%	0	0.0%
AUTO PARTS & ACCESSORIES	11,151	6.3%	5,285	3.2%	0	0.0%
FITNESS & LEISURE	2,357	1.3%	4,844	2.9%	0	0.0%
JEWELRY	0	0.0%	1,227	0.7%	0	0.0%
HOME FURNISHINGS & DÉCOR	0	0.0%	1,023	0.6%	0	0.0%
PERSONAL SERVICE	11,883	6.8%	0	0.0%	0	0.0%
FASHION & FOOTWEAR	2,906	1.7%	0	0.0%	0	0.0%
ARTS & ENTERTAINMENT	2,400	1.4%	0	0.0%	0	0.0%
HOME ELECTRONICS & APPLIANCES	1,109	0.6%	0	0.0%	0	0.0%
SPORTING GOODS & OUTDOOR RECREATION	0	0.0%	0	0.0%	0	0.0%
TOYS & HOBBIES	0	0.0%	0	0.0%	0	0.0%
BOOKS, MEDIA & VIDEO GAMES	0	0.0%	0	0.0%	0	0.0%
TOTAL	176,022		166,023		128,327	
Retail ONLY Floorspace (excl Medical & Wellness, Professional, Auto Service & Vacant)	103,796	59%	99,857	60%	115,055	90%
Total Estimated Retail Sales (excl Medical & Wellness, Professional, Auto Service & Vacant)	\$22,783,687		\$31,924,635		\$41,405,104	
Estimated Retail Sales Productivity (\$/sf)	\$220		\$320		\$360	

District profile (3) – Southern Area

Newer, corridor commercial-type developments are located south of the railway tracks along 100 St. These are located mainly within the Westwinds development and the Westmor Landing retail area. There are also a couple retailers located in the Morinville Industrial Park across the street.

This area has the least amount of total retail space at 128,327, however this is the area of newest growth and it is expected to continue attracting the higher profile branded retail formats such as Shoppers Drug Mart, Boston Pizza, No Frills, McDonalds, Tim Horton's etc.

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

1. Grocery, Convenience & Specialty Foods (45,327 sf)

2. Home Improvement & Gardening (16,598 sf)

3. Limited Service F&B (11,571 sf)

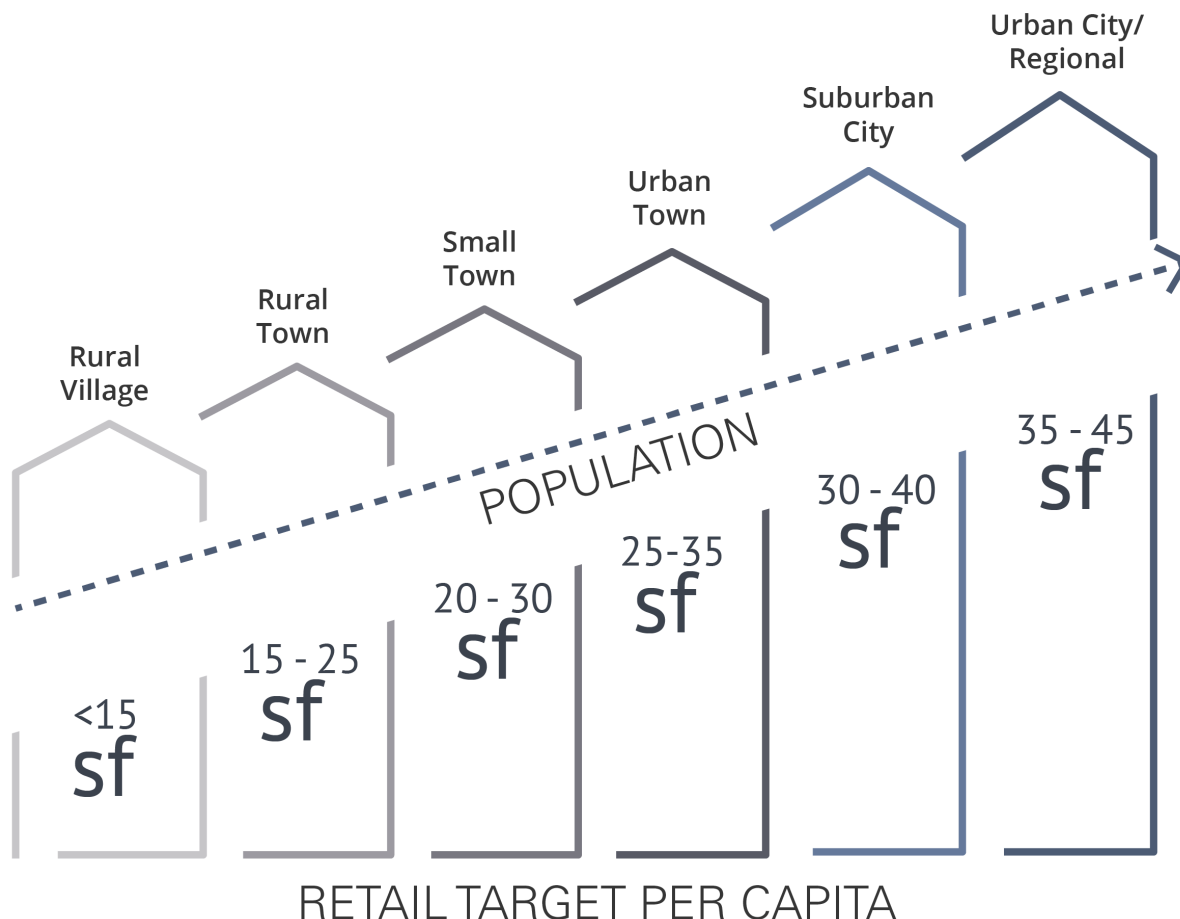
4. Full Service F&B (5,920 sf)

5. Specialty Retail (3,617 sf)

As Morinville continues to grow and as its commuter workforce continues to travel south to St. Albert, this southern area will become an important node for the city by establishing a convenient "pit stop" for the commuting-home segment. Contrary to 100 Avenue, the southern area will be the benefactor of more branded retail interest since the development typologies, formats and layouts are recognized and simple to accommodate.

Figure 4-6. Morinville Retail Space Per Capita Trajectory and Relationship

(Source: FBM)



MORINVILLE'S PER CAPITA RETAIL RATIO IS 14.2 sq. ft. per capita when applied against the trade area population of 19,343. An appropriate target for Morinville's Trade Area could be in the range of 20 sf per capita

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 6.5%. This vacancy is slightly above that which is normally considered a 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.

The latter total vacancy includes 15 spaces (7 in 100 Avenue, 7 in 100 Street and 1 in South). The average vacancy size is just over 2,000 sf (2,041 sf) which suggests an ideal roster of spaces that could easily be absorbed by local or branded retail, pending location and quality. Morinville does not struggle with having to backfill large vacancies (largest vacancy is 3,649 sf), which often represent a bigger challenge.

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 Morinville.

As a starting point, **Figure 4-6** depicts the optimal 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 the Town of Morinville'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). Conversely, suburban or smaller towns should fall within the 20 sf to 30 sf range of this spectrum.

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 Morinville with its competitive geography to St. Albert this figure should fall in the 20 sf per capita range.

Accordingly, the estimated retail space per capita ratio for Morinville and its 19,343 person retail trade area is in the range of 14.2 sf/capita if not including non-retail street front space and not accounting for other limited retail in the trade area. Morinville should be striving for a target retail space per capita ratio of 20 sf/capita. For example, a trade area of 20,000 residents supporting a per capita ratio of 20 sf would result in a total supportable inventory of between 400,000 sf or **approximately 110,000 sf more than exists today (for retail-specific categories)**. When looking at the current growth of Morinville, particularly in the South, it is not inconceivable that this is where new demand would be most desirable, which would also leave smaller strategic infill redevelopment in 100 Avenue or 100 Street, where existing vacancies should absorb some of that residual opportunity.

As will be seen in the demand section of this study, the 110,000 sf residual demand estimate almost mirrors the quantified forecast demand.

5.0 Stakeholder & Consumer Engagement

5.1 Resident Consumer Survey

A community survey was conducted by the project team to inform the Gap Analysis. The purpose of this survey was to obtain feedback from residents of, and visitors to, the Town of Morinville to identify current shopping preferences and patterns, the types of commercial businesses the community would like to see, and gaps in current goods and services.

The survey was hosted on the Engage Morinville site and was shared with the community via the Town of Morinville's Facebook page and website. The survey was open between September 1st to 27th 2024 and gained 229 responses. The majority of respondents (90.7%) reported living within the Town of Morinville and the postal code results reflected this (Figure). At the completion of the survey, approximately 90% of respondents chose to enter a draw for a \$50 gift card to a Morinville business of their choice.

The following is an aggregated summary of the resident survey results. The full list of survey questions and Engage Morinville report is provided in **Appendix B**.

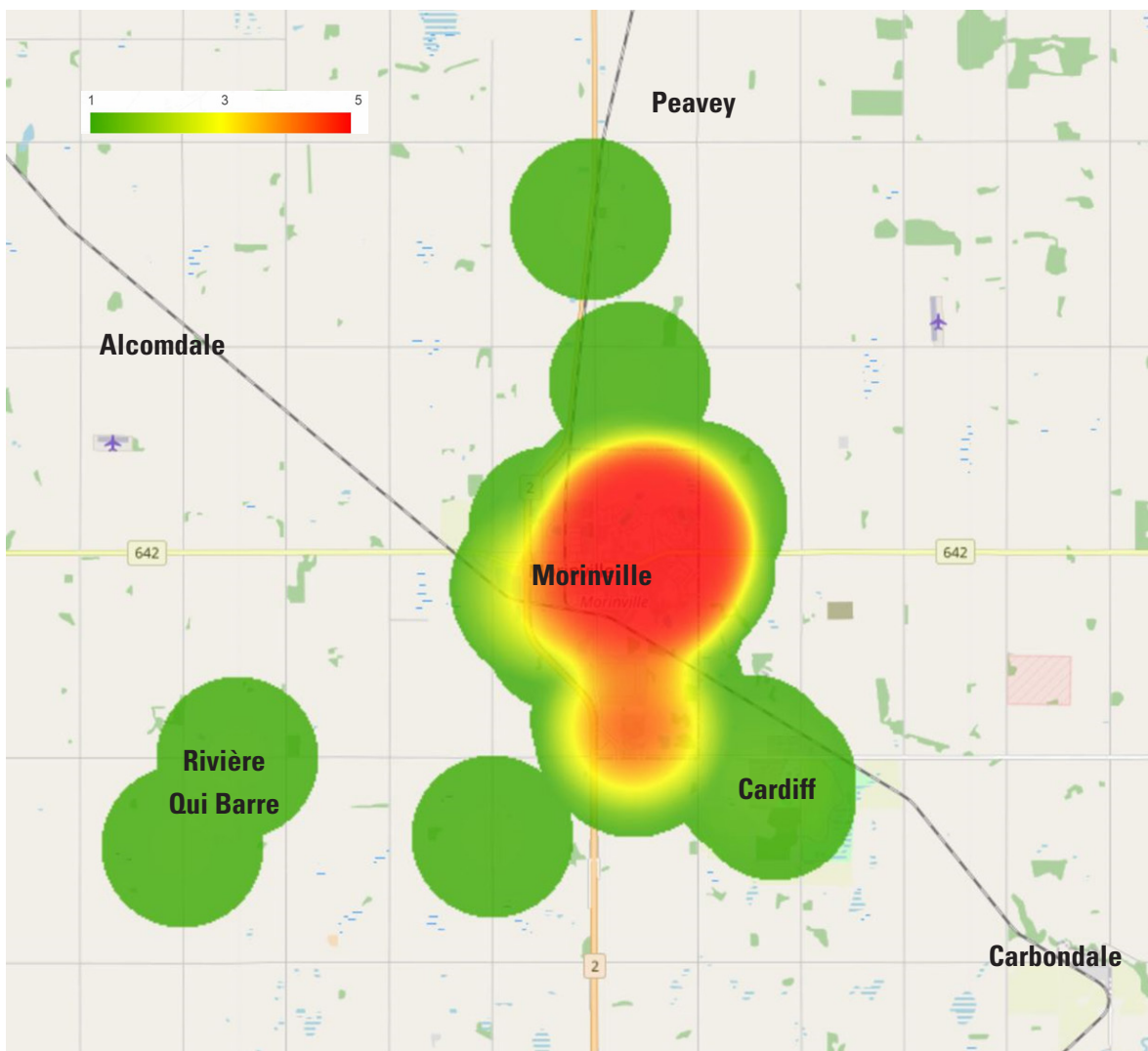
Visitation

When respondents were asked where they prefer to shop for day to day conveniences, 76.4% selected the Town of Morinville. Respondents reported using shops and services in Morinville most often on a weekly (59%) or daily (31.9%) basis. The most common reason (98.6%) amongst respondents for using shops and services in Morinville was living in the area, followed by working in the area (16.6%).

The City of St. Albert was selected by the majority of respondents (76.9%) as their preferred location to shop for bigger ticket items such as home, auto, apparel and electronics.

Figure 5-1. Survey Respondents Postal Code Heat Map

(Source: FBM and Polaris)



This is unsurprising given the proximity of Morinville to the City's major commercial nodes. Edmonton was the second most popular (17.5%) destination for major purchases.

Household Spending

Respondents were asked to estimate what percentage of their average annual household spending occurred inside and outside the Town of Morinville and online. Spending inside the municipality was highest in the category of convenience and day to day goods and services with the majority of respondents reporting spending up to 40% of their annual household spending in Morinville. Across the other merchandise spending categories, spending in Morinville was lowest (1-20%) in comparison goods and services (fashion, home goods and other).

Spending outside of Morinville was reportedly highest (81-100%) in the merchandise category of comparison goods and services. Approximately 60% of respondents reported spending 81-100% of their household spending on fashion outside of Morinville. Online spending was fairly consistent across the merchandise categories and spending ranges, with 85-95% of respondents reporting spending under 60% of their spending online. Spending online was lowest in the leisure, recreation and entertainment goods and services (72% of respondents selected the 1-20% category), and highest in fashion (comparison goods and services) with 15% of respondents reporting over 60% of their household spending being online.

Gaps in Goods & Services

Missing a specific retailer or services (92%) and missing specific merchandise (91%) were the most commonly selected reasons respondents do not use shops or services in the Town of Morinville. The cost of goods and services (39%) and hours of operation (36%) were also commonly selected reasons.

When asked what shops or services are missing in the Town of Morinville, the most commonly selected merchandise category was fashion and accessories (95%) and sporting goods, books and hobbies (80%). These results were echoed in the open ended responses with many reporting a desire for more:

- *Clothing and footwear options (particularly undergarments and new affordable family clothing)*
- *Recreation and entertainment options (e.g. 24/7 gym, pool, arcade, movie theater)*
- *Sit down restaurant options (e.g. bakery, family friendly, healthy options, local produce, cafe, craft distillery)*

- *Places to buy children's toys, recreation/sports equipment, home decor and gifts*
- *Hotel to support local events and visitors*
- *Repair shops and fit it yourself options*

Giant Tiger was the most commonly requested new retail addition, followed by Red Apple (Figure 17). Affordability and variety in goods and services, and operating hours, will be key to attracting and retaining customers given the proximity of St. Albert and Edmonton. Respondents also commented on the potential for Morinville's main street (100 Ave) to be revitalized, reenergized and promoted to attract more unique small businesses and encourage more customers to frequent the area. Filling in vacant lots and creating more leasable spaces along main street was reported as a key opportunity.

Throughout the survey, there was a common sentiment against more liquor and cannabis stores, which is an increasingly common perspective in small towns across Alberta. It is important to note that in the vast majority of cases, a communities Land Use Bylaw regulates where these stores can be located in a community as-of-right. Bylaws rarely regulate the number of any given use (e.g. the number of stores) in an area without a strong rationale grounded in sound planning principles.

5.2 Complementary Sectors Stakeholder Engagement

Interviews with Local Businesses

The consulting team and the Town of Morinville's economic development department staff identified local businesses representing a variety of industry sectors to be contacted for one-hour virtual and in-person interviews. The purpose of these interviews was to develop an understanding of the current business landscape in Morinville, discuss challenges that local businesses face and identify barriers to attracting new businesses to the community. Interviewees were asked specifically the types of businesses that Morinville should be trying to attract with consideration on businesses that could be located within Morinville's industrial park. In addition, the interviews explored how the Town of Morinville's economic development department and the Morinville Chamber of Commerce could work collaboratively to support local businesses and attract new investment to the community.

Interviews took place between July and October 2024, and five local businesses were interviewed. It should be noted that attempts (by phone and email) were made to schedule interviews with more local

Figure 5-2. Respondent Desired Stores

(Source: FBM with survey data)

Interpretation: Larger font sizes represent the stores most frequently requested by survey respondents.



businesses; however, these were unsuccessful.

The following represents the aggregated responses from the local businesses that were interviewed, comprising the interviewee's individual opinions and perspectives on the questions asked. At times the interviewees response may not be factually correct, based on outdated data, rumour or heresy. Therefore, Morinville should ensure that residents, business owners and stakeholders are provided accurate, up-to-date information that is readily available. An example of this, is the perception that the permit process is slower than other municipalities or that Morinville's tax rates are higher than municipalities within the Edmonton area. There is an opportunity for the Morinville to conduct comparative analysis to illustrate where it is positioned in respect to municipalities in the Edmonton area. Communicated to the broader public and stakeholders, the latter information would be valuable as a data set but also as part of investment attraction efforts.

What we asked:

1. *How would you describe the current state of the local economy in Morinville today?*
2. *What businesses do you think Morinville needs (specifically light industrial)?*
3. *How should Morinville attract new (light industrial) businesses?*
4. *What challenges is you/local businesses facing currently?*
5. *What are the greatest barriers to attracting new business to Morinville?*
6. *How can the Town of Morinville and the Chamber work together and foster business growth and attraction?*
7. *Are there examples of City incentive programs that you think could work in Morinville?*
8. *Are there any reports or studies that you think we should review?*

What We Learned:

1) Current State of the Economy in the Municipality

Morinville is characterized by relatively less expensive housing and cheaper land compared to surrounding areas, making it an attractive destination for potential residents and businesses. Recently, several lots in the Industrial Park have been purchased, which signals some positive economic activity in Morinville.

However, the overall permitting process remains a significant hurdle, contributing to interviewees' perception that Morinville is losing valuable business opportunities. Interviewees consistently expressed concerns regarding the length of the permitting process. Interviewees suggested that acquiring permits in Morinville takes considerably longer than in other Edmonton-area municipalities. This perceived inefficiency can deter potential investments and prompt businesses from considering relocating to more favourable environments, such as Campbell Business Park in St. Albert, where costs may be lower.

The recent increase in taxes and high property assessments are significant issues for local businesses, with many questioning the viability of their operations. This financial strain has resulted in reduced engagement in community events and sponsorships, as businesses navigate rising operational costs while residents face tighter budgets.

Despite the economic challenges, Morinville is witnessing a surge in residential infill projects, which contributes positively to community development. Many businesses, particularly those in the Industrial Park, report strong performance, indicating a resilient local economy. However, a substantial portion of the population—approximately 50%—commutes to jobs outside of Morinville, leading to increased spending in neighboring communities rather than locally.

While the Industrial Park has sold most of its lots and has plans for further development, many businesses remain unclear about when these projects will come to fruition. Interviewees also noted that there are rumours concerning vacant land in Morinville, suggesting that certain owners are hesitant to develop due to potential competition. They also noted discussions regarding the establishment of an Industrial Park business association, which could enhance collaboration and communication among local businesses.

To further support economic growth, there is a recognized need for infrastructure improvements, including the proposed traffic circle at the end of 100th Street. Champion Pet Foods recently closed their plant, raising concerns about the future of that site. While Morinville faces similar challenges as other municipalities regarding the cost of doing business, ongoing retail developments, such as the construction of Shoppers Drug Mart and Dollarama, reflect a

generally positive trajectory for Morinville's economy.

2) Businesses that Morinville Needs

There is a strong call within the community for more variety in retail offerings. Interviewees noted that residents express a desire for stores like Giant Tiger or Red Apple, which would provide essential items such as underwear and socks. Additionally, the introduction of a Canadian Tire could enhance the range of shopping options available to local consumers. The community recognizes a pressing need for industrial development, particularly in manufacturing sectors like fabrication or agriculture. There is potential to leverage emerging trends in the region, such as hydrogen production, to attract related businesses.

The establishment of lay-down yards could facilitate logistics and support local industries. The addition of another car dealership is seen as a valuable opportunity for local economic growth. Enhancing automotive services can draw more consumers into the area, creating jobs and stimulating associated businesses, such as repair shops. There is a clear demand for a hotel in Morinville, which would cater to visitors and potentially boost local tourism. A hotel can provide a crucial service, accommodating travelers and contributing to the local economy through spending on dining and entertainment.

Respondents felt that residents are keen on attracting unique businesses that can survive without relying solely on local consumers. Examples include companies like Flowpoint or ArcticTherm, which have strong profitability and export capabilities. Such businesses not only hire locally but also bring in revenue from outside the community, thus benefiting the local economy significantly. There is also a call for the creation of small commercial spaces (around 2,500 square feet) that could accommodate various types of businesses, such as a glass shop or plumbing services. Furthermore, the community seeks to enhance its grocery offerings with a larger store and more clothing retail options to compete with nearby markets like Westlock, which currently dominate the agricultural value-added sector.

3) What Morinville Needs to Do to Attract New Businesses, especially light industrial

Morinville offers an attractive housing market characterized by relatively inexpensive homes compared to neighboring areas. This affordability can be a significant draw for new residents and businesses looking to establish themselves in a cost-effective environment, enhancing the overall appeal of

the community.

To further stimulate growth, Morinville needs shovel-ready lands, particularly the Coal Creek lands and areas south of the Industrial Park. These sites could be pivotal for attracting new developments and businesses, providing the necessary infrastructure to support economic expansion.

Morinville is making strides in encouraging development through initiatives like the Tax Incentive for construction and the commercial services incentive proposed by the Chamber for infill development. These incentives are vital for making Morinville a more attractive location for prospective businesses and investors.

Respondents felt that a critical area for improvement is the municipality's outdated policy framework. Many Area Structure Plans (ASPs) are over 20 years old and believed to conflict with current Land Use Bylaws. Streamlining these processes and creating a blanket approval mechanism that aligns with Alberta Transportation could significantly reduce red tape and foster a better environment for development.

Interviewees believe that it is essential to ensure that businesses located in the Reil Business Park in St. Albert are aware of Morinville's potential for expansion. Enhanced communication and promotion of Morinville's advantages can attract interest from businesses looking to relocate or expand, thereby diversifying the local economy.

Overcoming the perception that Morinville is far from other urban centers is crucial. Many potential investors may mistakenly believe it is isolated, similar to nearby Westlock. To combat this, a comprehensive marketing and promotions strategy is necessary. This should include a clear budget, target audience, and chosen channels to effectively communicate Morinville's strengths. Additionally, implementing a new build or development tax rebate could incentivize new business growth and further enhance the community's economic prospects.

4) Challenges currently facing local businesses

The rising costs of goods and services are placing significant pressure on the local service industry, particularly restaurants and bars. These businesses are grappling with increased operational expenses, which are compounded by challenges in finding and retaining staff. The labour market has become competitive, making it difficult for establishments to maintain adequate staffing levels.

Municipal non-residential taxes are set to increase by 5%, further straining local businesses already facing

economic challenges.

This rise in taxes can deter new investment and add to the financial burdens of existing businesses, potentially impacting their profitability and ability to operate effectively.

A considerable percentage of Morinville residents commute outside the municipality for work, leading to significant shopping leakages. Many residents choose to shop in nearby cities like St. Albert and Edmonton due to perceived service gaps in Morinville. This trend underscores the need for more diverse retail options and services to retain local spending.

Morinville faces a critical lack of labour, exacerbated by insufficient infrastructure to support growth. The absence of amenities such as two rinks, a hotel, a non-denominational school, and a proper trail system limits the municipality's appeal and hinders potential economic development. These infrastructure gaps may persist, creating a challenge for attracting new residents and businesses.

Property taxes in Morinville have skyrocketed, with the municipality relying heavily on tax revenues from businesses to fund recreation centres and services. This reliance may lead to increased dissatisfaction among business owners who feel their contributions are not being reinvested into the local economy effectively.

Inflation is having a profound impact on the local economy, affecting everything from operational costs for businesses to household budgets for residents. As prices rise, both businesses and consumers must navigate increased financial pressures, which could further exacerbate the challenges faced by the service industry and local economy as a whole.

5) Barriers to attracting new businesses to Morinville

The most significant barrier to development in Morinville is the permitting process, particularly concerning Alberta Transportation. The current permitting process is viewed as cumbersome and fraught with red tape. To facilitate development, the town should consider increasing staffing in the planning department to streamline approvals. Emphasizing a culture of "yes" rather than barriers could significantly improve Morinville's attractiveness as a destination for new businesses and economic growth.

Morinville faces land constraints, particularly in areas like South Glens, where proximity to the Industrial Park has led to complaints from residents regarding noise and lighting.

The high cost of servicing and developing industrial land further complicates growth, making it essential for Morinville to explore additional industrial park opportunities to attract new businesses.

To enhance the appeal of Morinville, there is a call for a comprehensive beautification and streetscape plan. The current state of Main Street is seen as inadequate, with calls for high-quality businesses and cohesive development standards. Increasing higher-density residential options downtown could also stimulate local retail, fostering a vibrant business environment.

6) How to improve relations between the Chamber of Commerce and the Town of Morinville to work together to grow and attract businesses

Overall, the relationship between the Town and the Chamber of Commerce has been largely positive, with significant improvements observed over the past few years. Both parties strive to collaborate effectively, working together to support local business interests and community initiatives. Despite the overall positive dynamics, there are challenges that can affect cooperation. Some areas of the relationship are not as strong as they could be, indicating the need for ongoing dialogue and engagement to address concerns and enhance collaboration.

It was noted that the relationship between the Chamber and senior administration has been strained at times. The lack of meetings and communication between the Town and the Chamber on important issues has led to uncertainty and disconnect, impacting the effectiveness of joint efforts. The current state of the relationship between the economic development department and the Chamber appears stagnant. This stagnation suggests a need for renewed focus on collaboration to drive economic initiatives and better support the local business community.

Frequent changes in the Town's senior staff have contributed to instability in relationships between the Town and the Chamber. This turnover makes it challenging to establish long-term partnerships and to advance projects, highlighting the importance of consistent leadership for fostering effective collaboration.

To improve the situation, both the Town and the Chamber must prioritize communication and engagement. Building a stronger relationship will require commitment from both sides to address existing challenges, enhance cooperation, and ultimately work towards common goals that benefit the Morinville community.

5.3 Business Survey Results

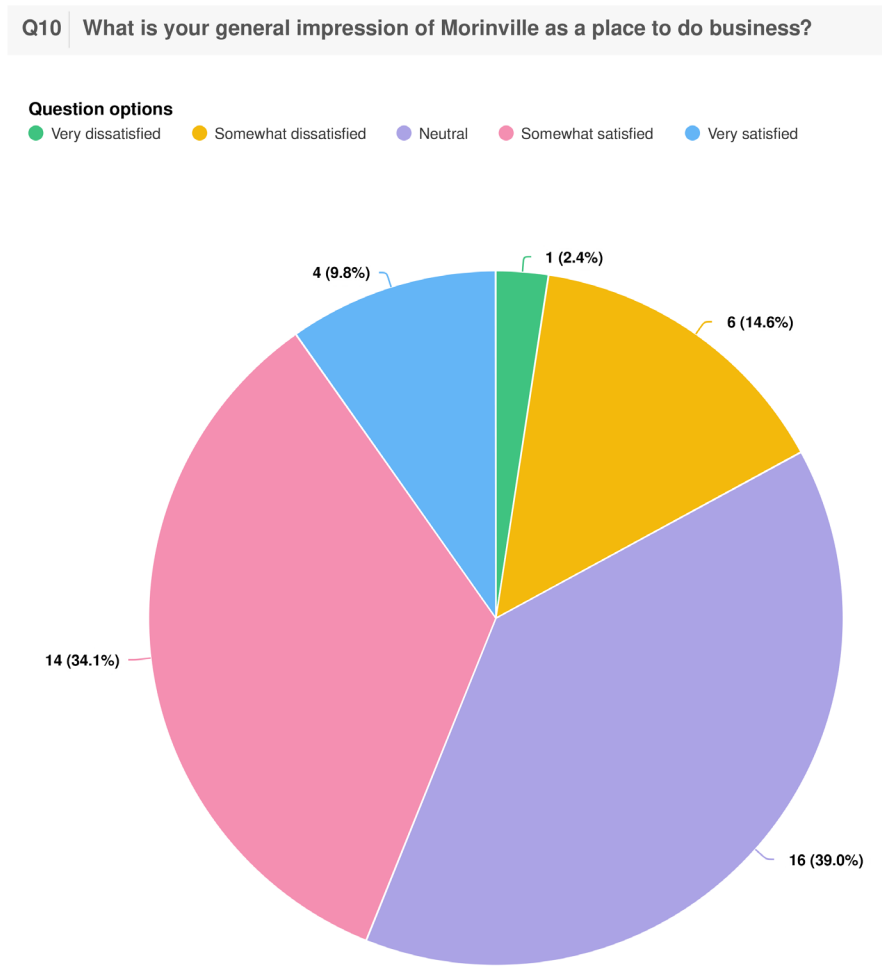
An online survey was developed to reach as many businesses as possible to understand the state of the current market, challenges for local businesses and opportunities for new investment attraction. The survey was promoted to businesses through the Town’s social media channels, the Town website and in addition the Morinville Chamber of Commerce shared the survey link to their membership. The survey was open from July 20 to September 26, 2024 and 41 responses were collected in total.

A significant number of responses were from home-based businesses (42%) and downtown businesses (32%). 10% of respondents indicated they were located within the Morinville Industrial Park.

There was an interesting representation of relatively new businesses (less than 5 years) at 30% and those had been operating their business within Morinville for more than 15 years at 50% of respondents.

Figure 5-3. General Impressions Survey Responses

(Source: FBM & Town of Morinville)



The survey demonstrated that the local business community primarily comprises locally owned small businesses. Local businesses represent the accommodation food services, retail trade, construction, professional and scientific, and arts and entertainment and health care. . 90% of respondents noted that they employed less than 10 full-time staff. Morinville’s business community is heavily focused on providing to the local market (68%) and regional (17%). Interestingly, 12% of local businesses indicated that their market is international.

Most local businesses have a business plan although only 46% indicated that they have succession plans in place. About half of the businesses that completed the survey indicated that they anticipate business to remain the same for the next year. However, a very positive sign for the local economy is that 46% of businesses have plans to expand over the next 12 months. An area for concern is the 5% of businesses that noted that they plan to relocate in the same timeframe. Overall, businesses are satisfied with Morinville as a place to do business and would recommend Morinville to other businesses considering locating to the community.

Businesses were asked to share their satisfaction regarding a range of factors that impact their operations. As shown in the table below, businesses identified the lack of business space (retail and industrial) as a major challenge within the community. Respondents also expressed their dissatisfaction with Morinville’s taxes and development/building permitting processes and a feeling that the municipality could do more to support local businesses.

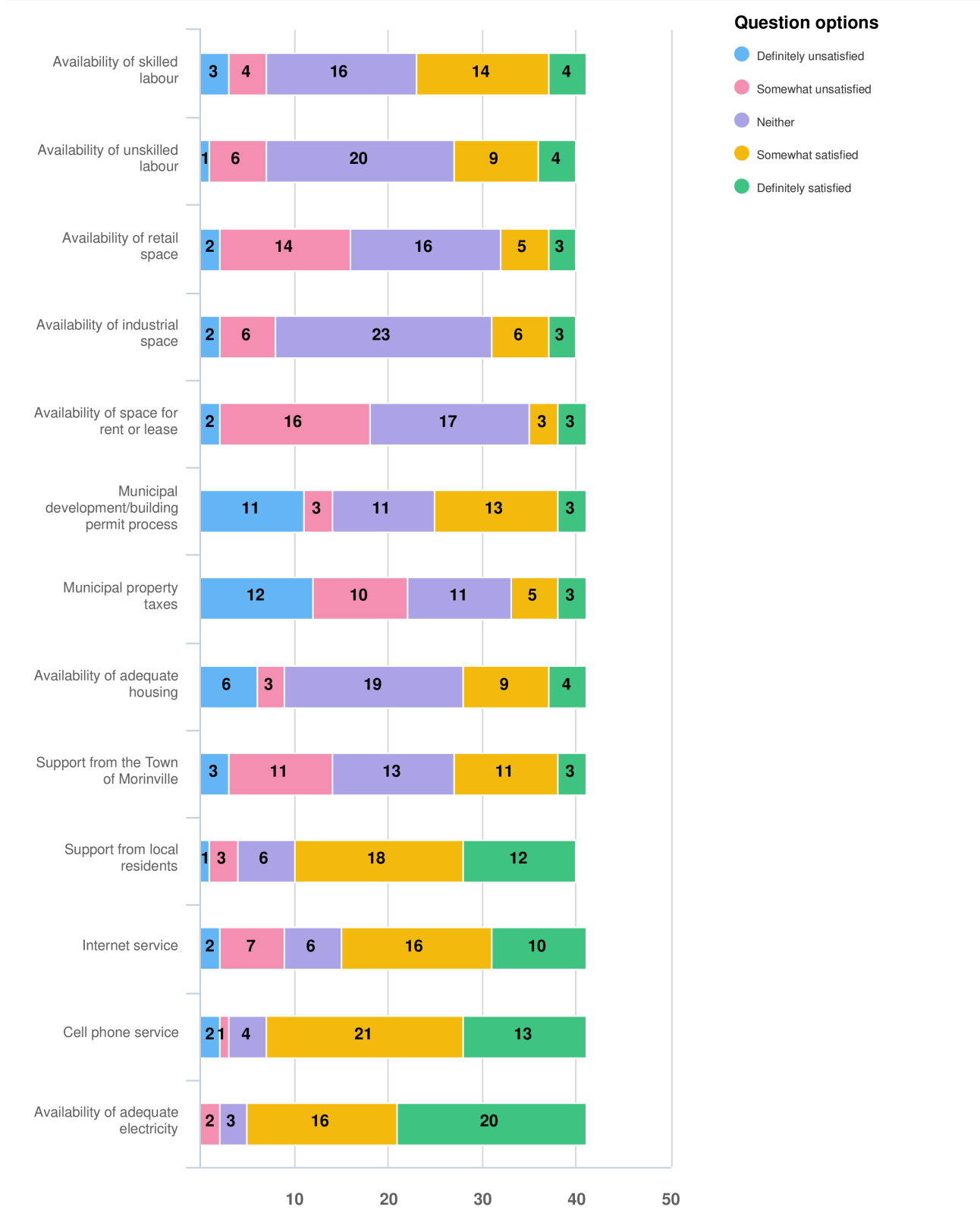
There was also concern regarding the availability of both skilled and unskilled labour within the community coupled with the availability of adequate housing.

Despite the low level of satisfaction with some factors, respondents felt that there are opportunities to attract new businesses to the community. The identified businesses included fitness, medical, grocery, building and construction, restaurants, and clothing stores. Businesses indicated that Morinville should try to encourage smaller-scale, local boutique businesses as well as larger recognized chain brands.

Figure 5-4. Driving Factors of Doing Business in Morinville

(Source: FBM & Town of Morinville)

Q12 How would you rate the following factors of doing business in Morinville?





100
BLOCK WEST
10507-100 AVE

NOW RENTING: 780.446.5600

FDC



6.0 Market Demand Analysis

6.1 Introduction

The following section will assess the amount of supportable retail floorspace in the Town of Morinville justified by the present Morinville trade area 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 Morinville.

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 Morinville are not expected to show dramatic increases, an alternative approach to demand is applied. Demand forecasts are predicated on past population projections that have shown moderate, but not significant population growth, and therefore can be considered conservative in their outlook since it is becoming more realistic to view Morinville 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 18.7%.**

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 Morinville'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 Morinville's 100 Avenue and 100 St nodes and in the range of \$20 to \$35 per sf in the south area

node, particularly where the newest retail 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 Morinville's trade area. **Table 6-1** reveals that Morinville's residents currently garner just under 19% of the available trade area spending. This means that over 80% of the resident trade area spending is spent outside of the community, most likely in St. Albert. As a comparison, comparably sized communities to Morinville in the region may have a retention rate of 30% to as high as 45%, which suggests that Morinville is under-retailed given its trade area attributes. However, the nature of Morinville's location relative to St. Albert and the strong retail offering that has evolved in the City's north is an ongoing challenge for Morinville in reaching the higher levels of this market share attraction.

The estimated market shares reveal that a category such as Grocery & Specialty Foods is capturing 44% of the trade area spending, where in reality this figure should be more in the range of 60%. The influence of Costco and Walmart in St. Albert must be considered as a primary factor in this market share.

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

The result of this forecast reveals that by 2034, Morinville could support an additional new 75,029 sf of retail space.

Table 6-1. Estimated Market Share Retention of Retail Spending in Morinville 2024

(Source: FBM & Manifold Data Mining Inc.)

Retail Spending by Merchandise Category		2024			
		MORINVILLE Sales Productivity (\$psf)	MORINVILLE Estimated Market Share	Market Share Sales \$	Current Retail Floorspace (sf)
Convenience & Day-to-Day Goods/Services	Grocery & Specialty Foods	\$549	44%	\$41,591,319	75,799
	Pharmacy	\$502	64%	\$5,341,375	10,646
	Alcohol & Tobacco	\$255	94%	\$6,391,341	25,048
	Personal Services	\$139	5%	\$1,654,628	11,883
	<i>Health Care & Medical (not applicable)</i>				
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	\$96	1%	\$279,727	2,906
	Jewelry	\$350	23%	\$429,480	1,227
	Beauty & Personal Care	\$109	14%	\$2,598,072	23,799
	Home Furniture & Décor	\$96	1%	\$98,423	1,023
	Appliances & Electronics	\$158	1%	\$174,618	1,109
	Home Improvement & Gardening	\$173	18%	\$6,004,809	34,735
	Books & Media	\$0	0%	\$0	-
	Sporting Goods	\$0	0%	\$0	-
	Toys & Hobbies	\$0	0%	\$0	-
	Specialty Retail	\$157	15%	\$2,116,319	13,487
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$345	46%	\$11,779,055	34,111
	Restaurants & Pubs	\$239	22%	\$7,033,529	29,418
	Arts & Entertainment	\$92	4%	\$220,532	2,400
	Fitness & Leisure	\$92	13%	\$661,597	7,201
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$241	12%	\$3,967,746	16,436
	Auto/RV/Motorsports Dealerships	\$210	6%	\$5,770,855	27,480
	<i>Auto Fuel (not applicable)</i>				
TOTAL RETAIL CATEGORIES ONLY		\$302	18.7%	\$96,113,425	318,709
TOTAL (excluding Auto)		\$314	23.8%	\$86,374,824	274,792

The combined categories that would be most notable in this would be Conveniences at 29,045 sf and Leisure, Entertainment & Recreation categories at 17,216 sf.

Specific new category types that represents opportunities include sporting goods and toys & hobbies. Sporting goods could potentially be provided by way of a local or quasi local franchise such as Source For Sports.

Forecasts to 2034 premised on conservative, maintained rates of market share reveal demand for just over 75,000 sf of new floorspace. It would be reasonable to allocate a maximum need for 5 acres of potential new land, assuming that all of the new floorspace would be occupied in new development, most likely at the already zoned and ready-to-build south area node.

A realistic expectation would be that some of this demand could be accommodated in some of the existing vacancies in 100 Avenue and/or 100 Street.

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

(Source: FBM & Manifold Data Mining Inc.)

Retail Spending by Merchandise Category		MORINVILLE Sales Productivity (\$psf)	MORINVILLE Estimated Market Share	Market Share Sales \$	Total New Retail Floorspace (sf)	Current Town Retail Inventory (sf)	Total Cumulative NEW Floorspace Demand (sf)
Convenience & Day-to-Day Goods/Services	Grocery & Specialty Foods	\$549	44%	\$51,382,539	17,844	75,799	17,844
	Pharmacy	\$502	64%	\$6,598,815	2,506	10,646	2,506
	Alcohol & Tobacco	\$255	94%	\$7,895,958	5,897	25,048	5,897
	Personal Services	\$139	5%	\$2,044,153	2,798	11,883	2,798
	Health Care & Medical (not applicable)			\$0			
				\$0			
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	\$96	1%	\$345,579	684	2,906	684
	Jewelry	\$350	23%	\$530,586	289	1,227	289
	Beauty & Personal Care	\$109	14%	\$3,209,697	5,603	23,799	5,603
	Home Furniture & Décor	\$96	1%	\$121,593	241	1,023	241
	Appliances & Electronics	\$158	1%	\$215,725	261	1,109	261
	Home Improvement & Gardening	\$173	18%	\$7,418,431	8,177	34,735	8,177
	Books & Media	\$0	0%	\$0	0	0	0
	Sporting Goods	\$0	0%	\$0	0	0	0
	Toys & Hobbies	\$0	0%	\$0	0	0	0
	Specialty Retail	\$157	15%	\$2,614,533	3,175	13,487	3,175
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$345	46%	\$14,552,021	8,030	34,111	8,030
	Restaurants & Pubs	\$239	22%	\$8,689,327	6,925	29,418	6,925
	Arts & Entertainment	\$92	4%	\$272,449	565	2,400	565
	Fitness & Leisure	\$92	13%	\$817,347	1,695	7,201	1,695
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$241	12%	\$4,901,812	3,869	16,436	3,869
	Auto/RV/Motorsports Dealerships	\$210	6%	\$7,129,401	6,469	27,480	6,469
				Auto Fuel (not applicable)			
TOTAL RETAIL CATEGORIES ONLY		\$302	18.7%	\$118,739,964	75,029	318,709	75,029
TOTAL (excluding Auto)		\$314	23.8%	\$106,708,751	64,690	30,613	44,416

Table 6-3. Estimated Retail Demand Summary 2024 to 2034 (Based on Maintaining Current Market Share)

(Source: FBM & Manifold Data Mining Inc.)

Retail Merchandise Category	2024	2029	2034	2024 to 2034	
	Current Floorspace Supply (sf)	Cumulative NEW Floorspace Demand (sf)	Cumulative NEW Floorspace Demand (sf)	Current Town Retail Inventory (sf)	Total Future NEW Demand (sf)
Convenience & Day-to-Day Goods/Services	123,376	11,423	29,045	123,376	29,045
Comparison or Department Store Type Merchandise (DSTM)	78,286	8,185	18,430	78,286	18,430
Leisure, Recreation & Entertainment Goods/Services	73,130	6,158	17,216	73,130	17,216
Automotive Goods (excluding repair)	43,917	4,052	10,339	43,917	10,339
Total (sf)	318,709	29,818	75,029	318,709	75,029

6.4 Demand Based on Increased Market Shares

Looking at current market shares however is only one possibility. There is an alternative direction for Morinville's retail opportunity that lies in incrementally increasing the overall market share of sales, while still being cognizant of the fact that drive times to larger markets like St. Albert and Edmonton will still prevail for many bigger ticket items.

Tables 6-4 and 6-5 provide a forecast of future demand in terms of floorspace and land based on applying an increasing market share across all categories and for previous categories where no inventory existed. While the reality may dictate that some categories may not necessarily need to increase their market share, others may seek to increase more percentage, 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 marginally, the total demand by the year 2034, based on conservative population growth, **but with spending growth and increased retention could result in incremental new space of approximately 127,532 sf, or more than 50,000 sf than if the current market shares are maintained.**

If an increase in demand was achieved, retail categories like Grocery, Home Improvement, Limited and Full Service F&B and new categories like Sporting Goods and Toys & Hobbies could become more prominent in Morinville.

Much of the forecast demand could reasonably and realistically be accommodated in new builds, which would increase Morinville'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 position 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 Morinville.

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, Morinville is a market that has a stable trade area but the depth of market spending for large scale retail tenant attraction is limited in the face of continued retail growth and expansion in nearby St. Albert. Therefore, Morinville's retail attraction strategy should be focused on incubating local retail and attracting multi-category retail (e.g. Giant Tiger).

The retail demand forecasts suggest a conservative opportunity for future retail in which there are tenants capable of moving the needle for sales retention and attraction in Morinville.

Table 6-4. Estimated Retail Demand (Based on Increasing Current Market Shares)

(Source: FBM & Manifold Data Mining Inc.)

Retail Spending by Merchandise Category		2034				2024 to 2034	
		MORINVILLE Sales Productivity (\$psf)	MORINVILLE Estimated Market Share	Market Share Sales \$	Total New Retail Floorspace (sf)	Current Town Retail Inventory (sf)	Total Cumulative NEW Floorspace Demand (sf)
Convenience & Day-to-Day Goods/Services	Grocery & Specialty Foods	\$549	48%	\$56,649,249	27,443	75,799	27,443
	Pharmacy	\$502	71%	\$7,275,194	3,854	10,646	3,854
	Alcohol & Tobacco	\$255	94%	\$7,895,958	5,897	25,048	5,897
	Personal Services	\$139	6%	\$2,473,425	5,881	11,883	5,881
	<i>Health Care & Medical (not applicable)</i>						
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	\$96	1%	\$381,001	1,052	2,906	1,052
	Jewelry	\$350	23%	\$530,586	289	1,227	289
	Beauty & Personal Care	\$109	14%	\$3,209,697	5,603	23,799	5,603
	Home Furniture & Décor	\$96	2%	\$147,127	506	1,023	506
	Appliances & Electronics	\$158	1%	\$261,027	549	1,109	549
	Home Improvement & Gardening	\$173	21%	\$8,976,301	17,189	34,735	17,189
	Books & Media	\$150	2%	\$138,294	922	0	922
	Sporting Goods	\$200	5%	\$689,985	3,450	0	3,450
	Toys & Hobbies	\$200	5%	\$491,644	2,458	0	2,458
	Specialty Retail	\$157	17%	\$2,882,522	4,883	13,487	4,883
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	\$345	51%	\$16,043,603	12,350	34,111	12,350
	Restaurants & Pubs	\$239	26%	\$10,514,086	14,557	29,418	14,557
	Arts & Entertainment	\$92	5%	\$329,663	1,188	2,400	1,188
	Fitness & Leisure	\$92	16%	\$988,990	3,563	7,201	3,563
Automotive Goods (excluding repair)	Auto Parts & Accessories	\$241	13%	\$5,404,248	5,951	16,436	5,951
	Auto/RV/Motorsports Dealerships	\$210	7%	\$7,860,165	9,949	27,480	9,949
	<i>Auto Fuel (not applicable)</i>						
TOTAL RETAIL CATEGORIES ONLY		\$298	20.9%	\$133,142,765	127,532	318,709	127,532
TOTAL (excluding Auto)		\$310	26.7%	\$119,878,353	111,633	30,613	96,919

Table 6-5. Estimated Retail Demand Summary 2024 to 2034 (Based on Increasing Current Market Shares)

(Source: FBM & Manifold Data Mining Inc.)

Retail Merchandise Category	2024	2029	2034		
	Current Floorspace Supply (sf)	Cumulative NEW Floorspace Demand (sf)	Cumulative NEW Floorspace Demand (sf)	Current Town Retail Inventory (sf)	Total Future NEW Demand (sf)
Convenience & Day-to-Day Goods/Services	123,376	17,451	43,074	123,376	43,074
Comparison or Department Store Type Merchandise (DSTM)	78,286	19,283	36,900	78,286	36,900
Leisure, Recreation & Entertainment Goods/Services	73,130	12,279	31,658	73,130	31,658
Automotive Goods (excluding repair)	43,917	6,450	15,900	43,917	15,900
Total (sf)	318,709	55,463	127,532	318,709	127,532



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 Morinville's locational, demographic and market context.

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

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

Retail Development Fundamentals

Retail development, whether in smaller communities such as those found throughout Alberta or the Prairies, or like those on the fringe of a larger urban or metropolitan market like Edmonton or St. Albert, 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 is 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 Benefits of Housing Diversity for Morinville's Retail Ecosystem

Across the retail industry, the adage *"retail follows rooftops"* has proven to be true. In the case of Morinville's growth, this adage is also true. However, as retail became more prominent in nearby St. Albert, the influence of nearby residential support for the downtown has declined because the amount of adjacent residential and overall housing mix still reflects a time when the downtown was the core retail location. It is for this reason that the amount and type of housing mix must continue to be prioritized within and in proximity to the downtown to ensure that the current amount of retail floorspace and retail opportunity can be supported and economically viable for the business owners and operators.

The importance of increasing the amount and diversifying the mix of housing in and around the downtown, is not only to provide a solid consumer base for retailers in walkable or more locally accessible location, but because it promotes a healthier community overall. From a retail perspective, a diverse housing stock for both customers and employees is also critical for supporting existing businesses and attracting new ones.

A mix of housing options especially in proximity to the downtown allows lower-income individuals to live near higher-income households, contributing to a more balanced economic ecosystem.

This can lead to increased overall spending in local businesses, as different groups of people have different consumption habits and preferences. This blending of consumer segments also creates a wider and more varied customer base, supporting local retail by ensuring a steady and diverse stream of consumers. Retailers benefit from having customers with different needs and purchasing capacities, helping to stabilize sales across economic cycles.

Housing diversity supports long-term community stability by preventing the displacement of low- and middle-income residents. This stability fosters a reliable customer base for businesses, as families and individuals can remain in the area and continue supporting local stores.

Another intangible factor of providing housing is the role that housing plays in employee attraction and retention. Employees who can find affordable housing near their place of work are less likely to leave for other jobs, reducing turnover and hiring costs.

This proximity also leads to more reliable and engaged employees, as they don't have the stress or cost of long commutes. In turn, well-staffed businesses provide better customer service, enhancing customer satisfaction and loyalty.

New businesses often prefer to set up shop in vibrant, diverse communities where a mix of people live and work. It provides a framework for orderly development, supports the local economy, and fosters strong community ties, contributing to Morinville's overall economic vitality and sustainability.

A diverse housing stock in proximity to Morinville's downtown is essential for the health and growth of the retail sector and supports the ideal retail hierarchy. It helps existing businesses by broadening their customer base and stabilizing their workforce, while making the community more attractive for potential new businesses by ensuring access to a varied and available talent pool. Broadly speaking, diverse housing contributes to economic diversity and overall community vibrancy, which are key factors in the sustainability and success of retail environments and core to Morinville's future success as it continues to grow as the regional shopping hub for the South Shore.

7.4 Allocation & Opportunities

The demand figures shown in **Table 7-1** provide guidance for retail growth in Morinville 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, **Morinville could add to its retail inventory by as much anywhere from 75,000 sf to 128,000 sf in specifically targeted categories/ business types by 2034 depending upon how the area is marketed by the municipality and businesses-alike.** Combined with new-to-market retailers this could still leave sufficient demand and opportunities for a continued mix of locally curated retail concepts.

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 Morinville, the current market share rate of 19% is very low and illustrates the competitive influence that St. Albert has on Morinville’s retail growth. It further suggests that the market does present a reasonable and realistic opportunity to increase its market penetration by adding new retail businesses, even if those retailers may have locations in St. Albert, especially in the southern part of St. Albert.

Table 7-1. Future Allocation of Demand to Year 2034 (Based on Current and Increased Market Shares)

(Source: FBM)

Retail Node	Total 10-yr New Demand by 2033 with CURRENT Market Share (sf / acres)		Morinville			
			% Share of Demand	Share of Demand (sf)	Site Coverage Ratio	Net Land Area (acres)
Total	75,029	5.0	100%	75,029	0.34	5.0
100 Ave			15%	11,254	0.75	0.3
100 St			10%	7,503	0.5	0.3
South			75%	56,272	0.3	4.3

Retail Node	Total 10-yr New Demand by 2033 with INCREASED Market Share (sf / acres)		Morinville			
			% Share of Demand	Share of Demand (sf)	Site Coverage Ratio	Net Land Area (acres)
Total	127,532	8.8	100%	127,532	0.33	8.8
100 Ave			10%	12,753	0.75	0.4
100 St			10%	12,753	0.5	0.6
South			80%	102,026	0.3	7.8

7.5 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.

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.

While there is no guarantee, the current retail market is absent of a few immediate opportunities for whom land exists 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.

The retail demand forecasts suggest an opportunity for future retail and there are tenants capable of moving the needle for sales retention and attraction in Morinville. Most notably, these include the following near-term targets:

Giant Tiger
Red Apple
JYSK
Dollarama
Goodwill
Peavy Mart
Sleep Country
Fit 4 Less (by Goodlife)
Planet Fitness
Starbucks (with drive thru)
Mary Brown's
Burger King
Carl's Jr.
Wok Box
OPA!
BarBurrito
Freshii
Chopped Leaf
Osmow's
Cob's Bread
Mr. Mikes Steakhouse Casual
State & Main
Fresh Slice Pizza
Firehouse Subs
Jersey Mike's
Oodle Noodle
Mucho Burrito
Coop Marketplace

Appendix A: Detailed Inventory

NAICS 2-DIGIT	NAICS GENERAL CODE	NAICS 6-DIGIT	NAICS DETAILED CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	TENANT NAME	ADDRESS	NODE	OCCUPIED FLOOR AREA (SF)	Branded Chain or Local Business
44	Retail trade	445320	Beer, wine and liquor retailers	ALCOHOL, TOBACCO & CANNABIS	AV Liquor House	10701 100 Ave	100 Ave	2,637	Local
45	Retail trade	459999	All other miscellaneous retailers (except beer and wine-making supplies retailers)	ALCOHOL, TOBACCO & CANNABIS	Alternatives and Options	10004 103 St	100 Ave	1,152	Local
44	Retail trade	445320	Beer, wine and liquor retailers	ALCOHOL, TOBACCO & CANNABIS	Great Canadian Liquor	10012 103 St	100 Ave	3,574	Brand
45	Retail trade	459993	Cannabis retailers	ALCOHOL, TOBACCO & CANNABIS	Uncle Sam's Cannabis	10219 100 Ave Unit 1	100 Ave	1,475	Local
61	Educational services	611610	Fine arts schools	ARTS & ENTERTAINMENT	Creative Cove	10126 100 Ave	100 Ave	2,400	Local
81	Other services (except public administration)	811122	Automotive glass replacement shops	AUTO PARTS & ACCESSORIES	Biddiscombe Auto Glass	9918 103 St	100 Ave	2,669	Local
44	Retail trade	441330	Automotive parts and accessories retailers	AUTO PARTS & ACCESSORIES	NAPA Auto Parts	10031 100 Ave	100 Ave	8,482	Brand
81	Other services (except public administration)	811111	General automotive repair	AUTO SERVICE	DC Auto Care	10301 100 Ave	100 Ave	5,188	Local
81	Other services (except public administration)	812115	Beauty salons	BEAUTY & PERSONAL CARE	Daisy Nails	10021 100 Ave	100 Ave	786	Local
81	Other services (except public administration)	812115	Beauty salons	BEAUTY & PERSONAL CARE	Hair and Holistics	9921 101 St	100 Ave	1,378	Local
81	Other services (except public administration)	812190	Other personal care services	BEAUTY & PERSONAL CARE	Evolution Tattoo Studio	10701 100 Ave Unit 3	100 Ave	1,023	Local
81	Other services (except public administration)	812115	Beauty salons	BEAUTY & PERSONAL CARE	Hair Rev Too	10014 103 St	100 Ave	1,119	Local
81	Other services (except public administration)	812115	Beauty salons	BEAUTY & PERSONAL CARE	Pro-Level Looks Hair Studio	10507 100 Ave Unit 105	100 Ave	2,336	Local
81	Other services (except public administration)	812190	Other personal care services	BEAUTY & PERSONAL CARE	Northern Belle Laser and Aesthetics	10301 100 Ave Studio 2A	100 Ave	2,390	Local
81	Other services (except public administration)	812190	Other personal care services	BEAUTY & PERSONAL CARE	Tweak Medi Spa	10002 100 Ave	100 Ave	1,518	Local
45	Retail trade	458112	Women's clothing retailers	FASHION & FOOTWEAR	The Sunrise Boutique	10607 100 Ave	100 Ave	2,906	Local
61	Educational services	611610	Fine arts schools	FITNESS & LEISURE	Movement Dance Studio	10507 100 Ave Unit 106	100 Ave	2,357	Local
72	Accommodation and food services	722511	Full-service restaurants	FULL SERVICE F&B	Bistro Di Madre Piccola	10015 100 Ave	100 Ave	3,175	Local
72	Accommodation and food services	722511	Full-service restaurants	FULL SERVICE F&B	Rednex Bar and Grill	10413 100 Ave	100 Ave	3,886	Local
72	Accommodation and food services	722511	Full-service restaurants	FULL SERVICE F&B	Golden Palace Restaurant	10209 100 Ave	100 Ave	3,531	Local
72	Accommodation and food services	722511	Full-service restaurants	FULL SERVICE F&B	Dong Khoi Restaurant	10603 100 Ave	100 Ave	2,723	Local
72	Accommodation and food services	722511	Full-service restaurants	FULL SERVICE F&B	LE Kitchen	10219 100 Ave Unit 4	100 Ave	3,111	Local
45	Retail trade	457110	Gasoline stations with convenience stores	GROCERY, CONVENIENCE & SPECIALTY FOODS	Esso (Circle K)	9106 100 Ave	100 Ave	3,509	Brand
45	Retail trade	457110	Gasoline stations with convenience stores	GROCERY, CONVENIENCE & SPECIALTY FOODS	Shell	10609 100 Ave	100 Ave	1,668	Brand
44	Retail trade	449211	Appliance, television and other electronics retailers	HOME ELECTRONICS & APPLIANCES	We Tech Morinville	10219 100 Ave Unit 3	100 Ave	1,109	Local
44	Retail trade	444180	Other building material dealers	HOME IMPROVEMENT & GARDENING	Morinville Flooring Centre	10310 101 Ave	100 Ave	4,575	Local
72	Accommodation and food services	722512	Limited-service eating places	LIMITED SERVICE F&B	A&W Canada	10604 100 Ave	100 Ave	1,862	Brand
72	Accommodation and food services	722512	Limited-service eating places	LIMITED SERVICE F&B	KFC	10512 100 Ave	100 Ave	1,798	Brand
72	Accommodation and food services	722512	Limited-service eating places	LIMITED SERVICE F&B	Higher Grounds	10019 100 Ave	100 Ave	2,594	Local
72	Accommodation and food services	722511	Full-service restaurants	LIMITED SERVICE F&B	Sal's Famous	10321 100 Ave	100 Ave	1,819	Local
72	Accommodation and food services	722512	Limited-service eating places	LIMITED SERVICE F&B	CRUNCHYZZ Pizza and Donair	10609 100 Ave	100 Ave	2,293	Local
72	Accommodation and food services	722512	Limited-service eating places	LIMITED SERVICE F&B	Nourish	10220 100 Ave	100 Ave	1,281	Local
72	Accommodation and food services	722512	Limited-service eating places	LIMITED SERVICE F&B	Pizza Hut	10605 100 Ave	100 Ave	1,550	Brand
72	Accommodation and food services	722512	Limited-service eating places	LIMITED SERVICE F&B	Morinville Pizza Palace and Fried Chicken	10219 100 Ave Unit 2	100 Ave	1,001	Local
62	Health care and social assistance	621310	Offices of dentists	MEDICAL & WELLNESS SERVICE	Froment Chiropractic Center	10405 100 Ave	100 Ave	1,141	Local
62	Health care and social assistance	621210	Offices of dentists	MEDICAL & WELLNESS SERVICE	Dr. Darren Romanowski and Associates	10407 100 Ave	100 Ave	2,196	Local
62	Health care and social assistance	621110	Offices of physicians	MEDICAL & WELLNESS SERVICE	Morinville Family Medical Clinic	10507 100 Ave Unit 104	100 Ave	2,390	Local
45	Retail trade	456130	Optical goods retailers	MEDICAL & WELLNESS SERVICE	i Candy Optical	10205 100 Ave	100 Ave	2,659	Local
81	Other services (except public administration)	811210	Electronic and precision equipment repair and maintenance	PERSONAL SERVICE	MobiFix	10701 100 Ave Unit 5	100 Ave	646	Brand
61	Educational services	611690	All other schools and instruction	PERSONAL SERVICE	Optimal Yoga and Wellness	9921 101 St Unit 102	100 Ave	1,507	Local
62	Health care and social assistance	624410	Child day-care services	PERSONAL SERVICE	Morinville Childcare	10601 100 Ave	100 Ave	2,551	Local
62	Health care and social assistance	624410	Child day-care services	PERSONAL SERVICE	Kanga and Roo's Child Care Centre	10513 100 Ave	100 Ave	5,823	Local
81	Other services (except public administration)	812310	Coin-operated laundries and dry cleaners	PERSONAL SERVICE	The Laundry Room	10605 100 Ave	100 Ave	1,356	Local
45	Retail trade	456110	Pharmacies and drug stores	PHARMACY	Morinville Family Pharmacy	10507 100 Ave Unit 103	100 Ave	2,357	Local
23	Construction	238220	Plumbing, heating and air-conditioning contractors	PROFESSIONAL & FINANCIAL SERVICE	Quinn's Plumbing & Heating Ltd	9923 101 St	100 Ave	5,737	Local
53	Real estate and rental and leasing	531212	Offices of real estate brokers	PROFESSIONAL & FINANCIAL SERVICE	Remax Real Estate	10018 100 Ave	100 Ave	4,865	Brand
22	Utilities	221210	Natural gas distribution	PROFESSIONAL & FINANCIAL SERVICE	Apex Utilities	10101 100 Ave	100 Ave	3,154	Local
52	Finance and insurance	522111	Personal and commercial banking industry	PROFESSIONAL & FINANCIAL SERVICE	RBC Royal Bank	9921 102 St	100 Ave	4,887	Brand
52	Finance and insurance	522130	Credit unions	PROFESSIONAL & FINANCIAL SERVICE	Servus Credit Union	10226 100 Ave	100 Ave	6,254	Brand
52	Finance and insurance	524210	Insurance agencies and brokerages	PROFESSIONAL & FINANCIAL SERVICE	Co-operators (Gaudry Financial Services)	10308 100 Ave	100 Ave	2,260	Brand
54	Professional, scientific and technical services	541213	Tax preparation services	PROFESSIONAL & FINANCIAL SERVICE	H&R Block	10006 103 St	100 Ave	980	Brand
54	Professional, scientific and technical services	541215	Bookkeeping, payroll and related services	PROFESSIONAL & FINANCIAL SERVICE	MBC Tools	10008 103 St	100 Ave	1,023	Local
54	Professional, scientific and technical services	541940	Veterinary services	PROFESSIONAL & FINANCIAL SERVICE	Animal Wellness Veterinary Clinic	10406 100 Ave	100 Ave	4,865	Local
54	Professional, scientific and technical services	541212	Offices of accountants	PROFESSIONAL & FINANCIAL SERVICE	Stevens and Company CPA	10507 100 Ave Unit 102	100 Ave	1,173	Local
54	Professional, scientific and technical services	541110	Offices of lawyers	PROFESSIONAL & FINANCIAL SERVICE	Peterson KrochakLaw Office	10201 100 Ave	100 Ave	2,260	Local
62	Health care and social assistance	624220	Community food services	PUBLIC SERVICE & EDUCATION	Morinville Food Bank	9916 104 St	100 Ave	2,110	Local
62	Health care and social assistance	624220	Community housing services	PUBLIC SERVICE & EDUCATION	Jessica Martel Memorial Foundation	10401 100 Ave	100 Ave	1,206	Local
49	Transportation and warehousing	491110	Postal service	PUBLIC SERVICE & EDUCATION	Canada Post	10232 100 Ave	100 Ave	3,638	Brand
45	Retail trade	459410	Office supplies and stationery retailers	SPECIALTY RETAIL	Hunters Print and Copy	10107 100 Ave	100 Ave	3,057	Local
45	Retail trade	459310	Florists	SPECIALTY RETAIL	The Flower Stop	9918 104 St	100 Ave	1,238	Local
45	Retail trade	459510	Used merchandise retailers	SPECIALTY RETAIL	Fusion Thrift Shoppe	10120 100 Ave	100 Ave	4,058	Local

NAICS 2-DIGIT	NAICS GENERAL CODE	NAICS 6-DIGIT	NAICS DETAILED CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	TENANT NAME	ADDRESS	NODE	OCCUPIED FLOOR AREA (SF)	Branded Chain or Local Business
45	Retail trade	459510	Used merchandise retailers	SPECIALTY RETAIL	Midstream Thrift Store	9922 101 St	100 Ave	1,518	Local
	Vacant		Vacant	VACANT	Vacant	10013 100 Ave	100 Ave	3,143	
	Vacant		Vacant	VACANT	Vacant (ex-Basil's Kitchen)	10504 100 Ave	100 Ave	1,572	
	Vacant		Vacant	VACANT	Vacant	10130 100 Ave	100 Ave	2,131	
	Vacant		Vacant	VACANT	Vacant	10410 100 Ave	100 Ave	2,077	
	Vacant		Vacant	VACANT	Vacant	10507 100 Ave Unit 101	100 Ave	1,119	
	Vacant		Vacant	VACANT	Vacant	9922 103 St	100 Ave	2,809	
	Vacant		Vacant	VACANT	Vacant	10219 100 Ave Unit 5	100 Ave	1,389	
44	Retail trade	445320	Beer, wine and liquor retailers	ALCOHOL, TOBACCO & CANNABIS	Liquor Planet	9925 100 St	100 St	3,272	Local
44	Retail trade	445320	Beer, wine and liquor retailers	ALCOHOL, TOBACCO & CANNABIS	U Save Liquor	9907 100 St	100 St	3,046	Local
45	Retail trade	459999	All other miscellaneous retailers (except beer and wine-making supplies retailers)	ALCOHOL, TOBACCO & CANNABIS	Vapify	9813A 100 Street	100 St	1,884	Local
45	Retail trade	459993	Cannabis retailers	ALCOHOL, TOBACCO & CANNABIS	Discounted Cannabis	9507 100 St	100 St	1,238	Local
44	Retail trade	445320	Beer, wine and liquor retailers	ALCOHOL, TOBACCO & CANNABIS	Great Canadian Liquor	9513 100 St	100 St	2,573	Brand
44	Retail trade	445320	Beer, wine and liquor retailers	ALCOHOL, TOBACCO & CANNABIS	Cold Ones Liquor Discounter	9504 100 St	100 St	926	Local
81	Other services (except public administration)	811111	General automotive repair	AUTO PARTS & ACCESSORIES	Trail Tire Auto Centres	9816 100 St	100 St	5,285	Local
81	Other services (except public administration)	811192	Car washes	AUTO SERVICE	High Gears Touchless Wash	9520 100 St	100 St	3,692	Local
81	Other services (except public administration)	811111	General automotive repair	AUTO SERVICE	CSN Morinville Auto Body	9812 100 St	100 St	8,902	Local
81	Other services (except public administration)	812115	Beauty salons	BEAUTY & PERSONAL CARE	Quartz and Mane	10006 100 St	100 St	1,539	Local
81	Other services (except public administration)	812115	Beauty salons	BEAUTY & PERSONAL CARE	The Niche Hair Studio	9907 100 St Unit 2	100 St	1,076	Local
81	Other services (except public administration)	812114	Barber shops	BEAUTY & PERSONAL CARE	Lions Den Barbershop	9809 100 St	100 St	1,981	Local
81	Other services (except public administration)	812115	Beauty salons	BEAUTY & PERSONAL CARE	GV's Hair Studio	9514 100 St	100 St	5,124	Local
81	Other services (except public administration)	812114	Barber shops	BEAUTY & PERSONAL CARE	Morinville Barber Shop	9918 100 St Unit 101B	100 St	2,260	Local
61	Educational services	611610	Fine arts schools	FITNESS & LEISURE	Dance Connection	9918 100 St Unit 214	100 St	4,844	Local
72	Accommodation and food services	722410	Drinking places (alcoholic beverages)	FULL SERVICE F&B	Coach's Corner	9517 100 St	100 St	4,209	Local
72	Accommodation and food services	722511	Full-service restaurants	FULL SERVICE F&B	The Morinville Grill	9918 100 St Unit 107	100 St	2,863	Local
45	Retail trade	457110	Gasoline stations with convenience stores	GROCERY, CONVENIENCE & SPECIALTY FOODS	Petro-Canada	9504 100 St	100 St	1,970	Brand
44	Retail trade	445110	Supermarkets and other grocery retailers (except Convenience retailers)	GROCERY, CONVENIENCE & SPECIALTY FOODS	Sobeys	10003 100 St	100 St	20,344	Brand
44	Retail trade	445131	Convenience retailers	GROCERY, CONVENIENCE & SPECIALTY FOODS	Circle K	9821 100 St	100 St	2,982	Brand
44	Retail trade	449123	Print and picture frame retailers	HOME FURNISHINGS & DECOR	Creative Design Framing	9802 100 St	100 St	1,023	Local
44	Retail trade	444110	Home centres	HOME IMPROVEMENT & GARDENING	Morinville Home Hardware	9910 100 St	100 St	13,563	Brand
45	Retail trade	458310	Jewellery retailers	JEWELRY	JM Turner Goldsmith	9602 100 St	100 St	1,227	Local
72	Accommodation and food services	722512	Limited-service eating places	LIMITED SERVICE F&B	Domino's	9925 100 St	100 St	1,658	Brand
72	Accommodation and food services	722512	Limited-service eating places	LIMITED SERVICE F&B	The Ice Hut	9911 100 St	100 St	506	Local
72	Accommodation and food services	722512	Limited-service eating places	LIMITED SERVICE F&B	Amanda's Pizza	9604 100 St	100 St	1,313	Local
72	Accommodation and food services	722512	Limited-service eating places	LIMITED SERVICE F&B	Subway	9521 100 St	100 St	1,690	Brand
72	Accommodation and food services	722512	Limited-service eating places	LIMITED SERVICE F&B	Panchita's Taqueria	9918 100 St Unit 113	100 St	1,496	Local
31	Manufacturing	312120	Breweries	LIMITED SERVICE F&B	Sturgeon Brewing Company	9918 100 St Unit 101A	100 St	1,679	Local
62	Health care and social assistance	621320	Offices of optometrists	MEDICAL & WELLNESS SERVICE	Capital Vision Care	9803 100 St	100 St	2,433	Local
62	Health care and social assistance	621390	Offices of all other health practitioners	MEDICAL & WELLNESS SERVICE	Bachand Denture Centre	9806 100 St	100 St	1,023	Local
62	Health care and social assistance	621310	Offices of dentists	MEDICAL & WELLNESS SERVICE	Morinville Chiropractic Clinic	9707 100 St	100 St	1,615	Local
62	Health care and social assistance	621210	Offices of dentists	MEDICAL & WELLNESS SERVICE	Lafleur Family Dentistry	9701 100 St	100 St	2,583	Local
62	Health care and social assistance	621210	Offices of dentists	MEDICAL & WELLNESS SERVICE	Morinville Dental Clinic	9918 100 St	100 St	3,789	Local
62	Health care and social assistance	621110	Offices of physicians	MEDICAL & WELLNESS SERVICE	Grandin Medical Clinic	9918 100 St Unit 112	100 St	1,389	Local
45	Retail trade	456110	Pharmacies and drug stores	MEDICAL & WELLNESS SERVICE	Meds and Care Pharmacy	9507 100 St	100 St	1,464	Local
45	Retail trade	456110	Pharmacies and drug stores	PHARMACY	Shoppers Drug Mart (Guardian Pharmacy)	10013 100 St	100 St	6,975	Brand
45	Retail trade	456110	Pharmacies and drug stores	PHARMACY	Shoppers Drug Mart (Champlain Pharmacy)	9918 100 St Unit 111	100 St	1,313	Brand
52	Finance and insurance	523920	Portfolio management	PROFESSIONAL & FINANCIAL SERVICE	IG Wealth Management	9703A 100 St	100 St	1,012	Brand
52	Finance and insurance	524210	Insurance agencies and brokerages	PROFESSIONAL & FINANCIAL SERVICE	Drayden Insurance and Registries	9612 100 St	100 St	4,521	Brand
54	Professional, scientific and technical services	541212	Offices of accountants	PROFESSIONAL & FINANCIAL SERVICE	Nash Giroux LLP	9815 100 St	100 St	2,013	Local
54	Professional, scientific and technical services	541110	Offices of lawyers	PROFESSIONAL & FINANCIAL SERVICE	Putnam Law LLP	9702 100 St	100 St	5,511	Local
52	Finance and insurance	522111	Personal and commercial banking industry	PROFESSIONAL & FINANCIAL SERVICE	Scotiabank	9927 100 St	100 St	3,154	Brand
91	Public administration	912910	Other provincial and territorial public administration	PUBLIC SERVICE & EDUCATION	Dale Nally MLA	9805 100 St	100 St	2,390	Local
91	Public administration	913910	Other provincial and territorial public administration	PUBLIC SERVICE & EDUCATION	Sturgeon County Utilities and Waste Management Services	9610 100 Street	100 St	3,068	Local
91	Public administration	913910	Other provincial and territorial public administration	PUBLIC SERVICE & EDUCATION	Sturgeon County Family and Community Support Services	9608 100 St	100 St	3,122	Local
91	Public administration	913910	Other provincial and territorial public administration	PUBLIC SERVICE & EDUCATION	Sturgeon County FCSS Training Facility	9608 100 St	100 St	1,518	Local
	Vacant		Vacant	VACANT	Vacant (former Budd Hutt)	9925 100 St	100 St	1,765	
	Vacant		Vacant	VACANT	Vacant	9913-17 100 St	100 St	3,649	
	Vacant		Vacant	VACANT	Vacant	9811 100 St	100 St	2,185	
	Vacant		Vacant	VACANT	Vacant	9703A 100 St	100 St	915	
	Vacant		Vacant	VACANT	Vacant	9510 100 St	100 St	1,163	
	Vacant		Vacant	VACANT	vacant (Maxwell Direct Realty)	9918 100 St Unit 109	100 St	1,335	
	Vacant		Vacant	VACANT	Vacant	9918 100 St	100 St	1,959	
44	Retail trade	445320	Beer, wine and liquor retailers	ALCOHOL, TOBACCO & CANNABIS	Legendary Liquor	9156 100 St Unit 2	South	2,067	Local
45	Retail trade	459993	Cannabis retailers	ALCOHOL, TOBACCO & CANNABIS	Canna Cabana	8807 100 St Unit	South	1,206	Brand
81	Other services (except public administration)	811199	All other automotive repair and maintenance	AUTO SERVICE	Jiffy Lube	8805 100 St	South	1,593	Brand
44	Retail trade	441210	Recreational vehicle dealers	AUTO/RV/MOTORSPORTS DEALERSHIP	RV City	8704 100 St	South	27,480	Local
81	Other services (except public administration)	812115	Beauty salons	BEAUTY & PERSONAL CARE	Q-Nails	8807 100 St Unit 5	South	1,270	Local
72	Accommodation and food services	722511	Full-service restaurants	FULL SERVICE F&B	Boston Pizza	9140 100 St	South	5,920	Brand

NAICS 2-DIGIT	NAICS GENERAL CODE	NAICS 6-DIGIT	NAICS DETAILED CODE	RETAIL MERCHANDISE or BUSINESS CATEGORY	TENANT NAME	ADDRESS	NODE	OCCUPIED FLOOR AREA (SF)	Branded Chain or Local Business
45	Retail trade	457110	Gasoline stations with convenience stores	GROCERY, CONVENIENCE & SPECIALTY FOODS	Shell	9154 100 St Unit 1	South	2,056	Brand
45	Retail trade	457110	Gasoline stations with convenience stores	GROCERY, CONVENIENCE & SPECIALTY FOODS	Mobil	8903 100 St	South	646	Local
44	Retail trade	445110	Supermarkets and other grocery retailers (except Convenience retailers)	GROCERY, CONVENIENCE & SPECIALTY FOODS	No Frills	8901 100 St	South	34,531	Brand
45	Retail trade	455219	All other miscellaneous general merchandise retailers	GROCERY, CONVENIENCE & SPECIALTY FOODS	Dollar Tree	8901 100 St	South	8,094	Brand
44	Retail trade	444110	Home centres	HOME IMPROVEMENT & GARDENING	Wolf Creek Building Supplies	8804 95 St	South	16,598	Local
72	Accommodation and food services	722512	Limited-service eating places	LIMITED SERVICE F&B	McDonald's	9154 100 St Unit 3	South	4,704	Brand
72	Accommodation and food services	722512	Limited-service eating places	LIMITED SERVICE F&B	Tim Horton's	8809 100 St	South	3,068	Brand
72	Accommodation and food services	722512	Limited-service eating places	LIMITED SERVICE F&B	Dairy Queen	8807 100 St Unit 1	South	2,476	Brand
72	Accommodation and food services	722512	Limited-service eating places	LIMITED SERVICE F&B	Panago	8807 100 St Unit 9	South	1,324	Brand
62	Health care and social assistance	621340	Offices of physical, occupational, and speech therapists and audiologists	MEDICAL & WELLNESS SERVICE	Morinville Physical Therapy and Sports Injury Clinic	8807 100 St Unit	South	2,368	Local
62	Health care and social assistance	621210	Offices of dentists	MEDICAL & WELLNESS SERVICE	Westmor Dental	8807 100 St Unit 19	South	1,227	Local
23	Construction	236110	Residential building construction	PROFESSIONAL & FINANCIAL SERVICE	Atlas Premium Homes	8807 100 Ave Unit 15	South	1,130	Local
52	Finance and insurance	522111	Personal and commercial banking industry	PROFESSIONAL & FINANCIAL SERVICE	ATB Financial	9156 100 St Unit 1	South	3,552	Brand
45	Retail trade	459910	Pet and pet supplies retailers	SPECIALTY RETAIL	PetValu	8807 100 St Unit 11	South	3,617	Brand
	Vacant		Vacant	VACANT	Vacant (unsure)	9154 100 St Unit 2	South	3,401	

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