

Calgary



Calgary City Wide

# Retail and Commercial Study

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# 1 Introduction

The City, working with J.C. Williams Group and IBI Group has completed a Citywide Retail and Commercial Study of Calgary to better understand current conditions and future needs. This study focuses on the commercial uses related to retail and services.

The key objectives achieved by this study include:

- Understanding the character and dynamics of the varied commercial areas and their potential for retail growth.
- Supporting key objectives of Calgary's Municipal Development Plan: emphasizing and supporting retail concentrations in activity centres and main streets to ensure Calgary residents have convenient access to goods and services city wide.
- Outlining a strategy to support retail and commercial success in Calgary.

This report summarizes the key findings and supported recommendations of the consulting work. It is organized into three main sections, and supporting appendices: Section 1 provides an overview of the findings and conclusions of the City wide Retail and Commercial Study and Strategy; Section 2 outlines and evaluates background and existing conditions in Calgary, including eight sector profiles detailing key socio-economic characteristics, retail supply and submarket data. This section also reports on how City policy and planning processes affect different types of retail; and Section 3 outlines the general principles for successful and viable retail and commercial development and redevelopment and translates strategic objectives into recommendations that can be pursued through specific actions.

This research is currently supporting policymakers on local area planning projects.

In this study **commercial** refers to an area of the city in which the primary land use is commercial activities, which includes shops, restaurants, and personal services. **Retail** refers to retail stores, shopping malls, and shops.





## Overview of the Retail and Commercial Study

### Goals and Strategic Objectives

The goal of this study is to help with the planning of retail areas in Calgary's developed areas in alignment with the Municipal Development Plan and city growth needs. It will provide the City's planners with additional tools to evaluate development proposals, as well as inform broader land use planning, economic and business decisions. Further, the existing retail and commercial data is intended to provide guidance to local businesses, industry and community groups.

### Key Research Findings

**Calgary's growing population, with higher than average household incomes make it particularly attractive to retailers and retail real estate developers.** Compared to the rest of Canada, Calgary and the whole of Alberta present an important opportunity, especially for retailers who sell moderate to lower priced products to a mass market. However, with a population of just over one million, Calgary is still a second choice for many very specialized or luxury retailers who prefer larger metropolitan areas so that they can build more than a single retail location. A number of these kinds of retailers currently operate successfully in Calgary.

Based on length of shopping trips, **residents are generally well served by their shopping options.** This is further confirmed by the fact that generally residents are shopping within Calgary for their convenience, food, goods and service purchases. When they choose to shop elsewhere it is online or outside of the country for non-grocery purchases. **The concern about extensive outflow to the surrounding region appears to be unwarranted.**

**Online shopping at this time is at a relatively low level** in Calgary but it can be expected to grow at a higher rate as online options improve. Purchases from outside of the country are becoming more accessible to shoppers. Calgary's younger, male residents are expected to lead the way in on-line shopping.



While the City is working on providing non-driving alternatives to local residents, such as better transit options and improved walking streets, it is clear that **shopping locations must provide adequate accommodation for cars, at least in the short to mid-term in order to be successful.** However, residents' interest in outdoor, casual lifestyles suggests that they will be amenable to pedestrian oriented improvements to shopping locations.

**With a total of 36 million square feet or 31 square feet of retail commercial space per capita, Calgarians are well served by the existing retail space.** They enjoy a full offering of merchandise and services within a short distance from where they live with the possible exception of those living in the West and Southeast sectors where retail selection is more limited.

**The retail industry is a highly competitive market.** Based on the supply and demand analysis, many retailers and developers are not producing sales per square feet at an overall Canadian industry standard.

The Calgary Municipal Development Plan has identified a series of activity centres and main streets ideal for growth and development. The level to which retail plays a role in these districts varies widely from one to the other. Districts that have a significant amount of existing retail can play very different roles within Calgary's retail structure- from local convenience to destination shopping. **It is important that the City identify where retail is an important factor and focus on these areas.** It is also key to consider the unique characteristics and development opportunities relative to policy development and context within these areas, rather than treating all districts the same.

## Strategy Summary

Calgary has many advantages when it comes to attracting and retaining commercial retail business. A young, growing population with strong earning potential contributes to the city's retail and commercial attractiveness. Through strategic planning programs and investment

in identified areas such as main streets and activity centres, The City continues to foster retail and commercial business.

The study identified that maintaining strong retail and commercial services in Calgary will require:

- Monitoring data to inform planning and investment in strategic locations.
- Adopting a more comprehensive approach to planning commercial retail areas city wide; this includes prioritizing areas for redevelopment where market strength optimizes business success.
- Creating incentives and other tools that focus on supporting mixed-use development projects. This includes, building more certainty into planning processes, particularly related to development costs.
- Rewarding proposed developments or redevelopments that meet City goals, and established criteria, through a streamlined planning process.
- Continuing to investigate and recognize the essential factors that make retail commercial development viable and successful in Calgary, in particular adequate parking.



# 2 Existing Conditions

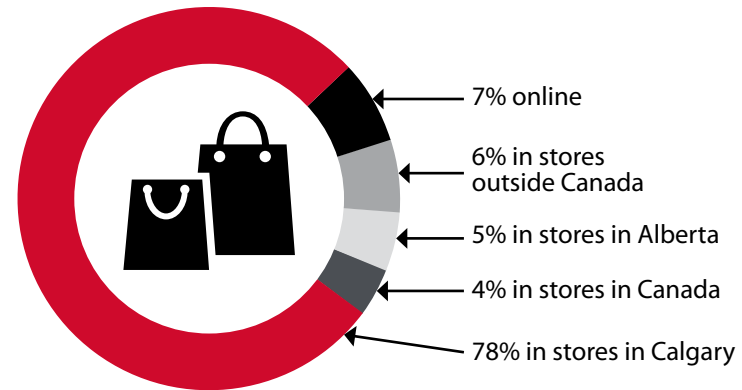
The study started with a thorough evaluation of Calgary's retail market and recent trends. This includes an online survey, comparative evaluation of main streets and activity centres for their retail viability and strengths, and an examination of The City's planning and processes related to retail development.

## Survey Data

An online survey was conducted in September 2014 with 500 respondents who lived and/or worked in Calgary. Key findings from the survey include:

- **Calgary does not have significant outflow of retail sales.** When it comes to grocery shopping, there is almost no sales leakage either to other parts of Alberta or online shopping.
- **Calgarians shop close to home.** Almost half of all trip distances measured are 4 km or less with residents of the South and Southeast sectors having the highest proportion of shorter trips. The highest proportion of longer trips (+10 km) was found in the West sector or among respondents who live outside of Calgary.
- **Most Calgary shopping trips are made in a car.** Travel by car is as high as 93% to power centres. Even pedestrian oriented shopping streets are mostly reached by car despite the fact that many are within walking distance of local neighbourhoods. The exception is the downtown where only 49% of shopping trips are made by car.
- **Free parking is a priority.** Regardless of what kind of retail location or shopping centre residents are visiting, the majority put free parking as their highest priority compared to other issues like wide selection of retailers.
- **Online shopping does not appear to be a major concern** for Calgary retailers and shopping centres at this point. Only 7% of non-grocery sales were reported to be currently made online. However, more than two-thirds of Calgary residents report searching online for deals and 42% making online purchases regularly (at least every three months).
- More than half of **Calgarians strongly value a casual, active, healthy lifestyle.** Shopping areas that reflect these values are more appealing to residents.

▼ Figure 1: Retail Spending Patterns





## Inventory

The primary goal of this inventory is to establish a consistent series of economic land-use related data for planning and development projects and programs. The aim is also to make this data accessible to Business Revitalization Zones (BRZs) and local business, industry and community groups.

The data for the study was collected from June 2014 to November 2014. A summary of key data points are noted in the sections below. More extensive detail on the data and geographic locations for the study is contained in the full data reports. The full reports are available electronically on the Planning and Development website.

## Socio-Economic Factors

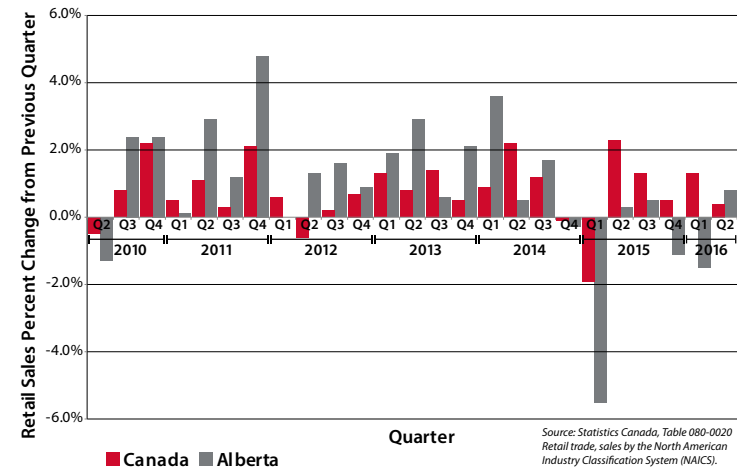
Based on City of Calgary estimates, the population of Calgary is expected to grow from 1.149 M in 2014 to 1.343 M in 2024.

At the time of the Study (2014), retail sales growth rate in Alberta was 6.6% compared to a national average of 2.5%\*. Retail growth rates in Alberta over a five year period have far exceeded national averages. This has been driven by the following socio economic factors:

- High population growth rates: 2.2% annual growth rate in Calgary.
- Low unemployment rates: 4.4%\* in Calgary compared to a national rate of 7%.
- Relatively high average household income: \$81,500.

\* Additional—more recent data related to retail sales in Alberta and other socio economic factors is provided in Appendix F.

▼ Figure 2: Retail Trade Sales, Percent Change (period-to-period)



## Retail Snapshot of Calgary

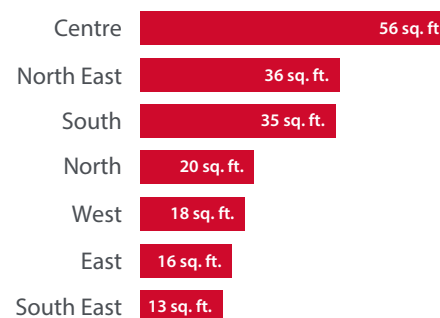
An extensive retail inventory has been conducted. The inventory includes eight geographically organized sector profiles that represent Calgary's retail and commercial activity. Submarket data includes retail types, supply and locations. It provides a framework for comparisons and cross-references among various socio-economic indicators. Snapshots of the eight sectors and a map indicating their geographic boundaries are provided in Appendix A.

Some key facts about the retail industry in Calgary include:

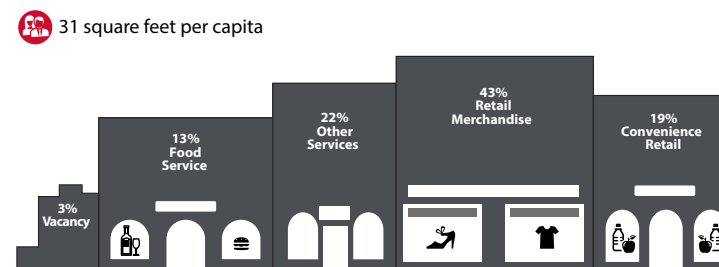
- Over **36 million square feet of retail space dedicated to selling** merchandise, food services and other services.
- Overall average of **31 square feet of retail space per capita**.
- Space is broken out into retail merchandise, convenience retail; e.g., grocery, food services; e.g., restaurants, and other services; e.g., personal such as dry cleaners, as shown below.
- Vacancy rate at 3%\* is very low.
- Areas with greatest proportion of destination shopping include Centre and South.
- Highest amount of shopping centre space is located in large retail power centres: 8.9 million square feet or 24.5% of all space compared to superregional malls at 5.9 million square feet or 16% of all space.
- Activity centres (as designated by the City's Municipal Development Plan) account for 8.5 million square feet or 23% of space – have a higher proportion of retail merchandise and lower proportion of food services.
- Main streets account for 8.8 million square feet or 24.3% – have a higher proportion of food services and lower proportion of retail merchandise.
- The retail mix of activity centres and main streets vary widely, with some having destination retail roles where others have almost no retail role.

\* See Appendix F for updated data.

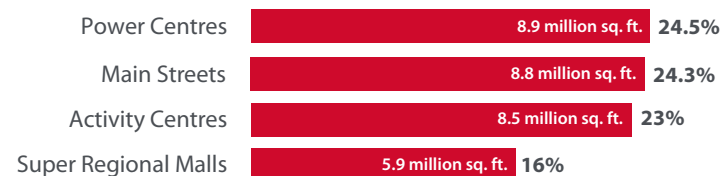
▼ Figure 3: Per Capita Space by District



▼ Figure 4: Retail Merchandise Categories and Supply



▼ Figure 5: Retail Forms and Supply



## Supply/Demand Projections

In order to review the total Calgary market, a set of assumptions were developed using existing data and projections as well as the retail industry standards of sales per square foot and data from the survey of Calgary shoppers. The estimates for current level of supply and demand as well as projected levels to 2024 were calculated. Based on the mid-range of retail productivity, the following conclusions were made:

- Calgary is currently supplied with an abundance of retail; there is currently more retail space than projected demand. The highest surplus of retail supply exists in the food services category, with some available demand in the convenience/grocery categories.
- Despite high levels of supply, the current vacancy rate is very low which suggests that developers and retailers are accepting lower-than-standard sales productivity rates.
- By 2024 there will be enough demand for an additional 1.4 million square feet but there is still projected to be an oversupply in the food services category.



## Strengths in the Calgary Market

Calgary has many advantages when it comes to attracting and retaining commercial retail business. These include:

- Calgary is appealing to retailers and developers. A young, growing population with strong earning potential contributes to the city's attractiveness.
- Calgary is growing. Based on City of Calgary estimates, the population of Calgary is forecast to grow to 1.343 M by 2024.
- Alberta retail sales have grown faster than the national average.
- Calgary has a relatively high average household income. \$81,500 is above the national average.
- Most Calgarians are well-served by existing retail space. However, the West and Southeast sectors have the potential to be better served.
- Activity centres and main streets are successful retail locations with opportunities for growth. The City has taken key steps to foster retail. The dynamics and characteristics of these areas vary widely though; the City should identify where retail is key.



## Challenges Facing the Calgary Market

Despite its competitive advantages, Calgary must deal with a number of challenges to sustain and grow businesses in some strategic locations.

The following factors should be considered for retail success in Calgary:

- Calgary has a surplus of retail space and is oversupplied in some categories. The highest surplus is in food services (such as restaurants), while convenience/grocery is slightly undersupplied.
- Car access is very important in the short- to mid-term. Mobility options are improving and can be coupled with active, healthy lifestyles to strengthen car-free retail choices.

The retail industry is a highly competitive market. Retailers may plan to “grow into” a space and/or developers are making space appealing by lowering costs to attract retailers. For many retailers, sales per square feet are below the Canadian average. While this situation has kept vacancy rates relatively low, there are some potential negative consequences:

- Developers must keep their building costs as low as possible, which makes them much more sensitive to any requirements for design enhancements or delays in project approvals.
- Overall, the market could face increased vacancies if retailers require better sales productivity or if new developments attract retailers to move their stores from older developments.
- The most vulnerable shopping areas are non-grocery anchored neighbourhood and community centres that are primarily service retail. Without an anchor that draws consistent traffic and with little incentive for reinvestment, these centres could become run-down and unattractive compared to newer centres. It also means that developers have less cash flow to invest in improvements to existing properties.

These issues can make redevelopment more of a challenge in established areas.



### Trends

To continue building on the city's retail success, it is important that Calgary businesses stay informed about global and future trends. The study outlines the current market context and trends.

The ever changing nature of retail makes planning for retail challenging. Some of the issues that Calgary will face from these changes include:

- Scale** – trends affecting scale include blurring of categories (retailers looking for growth in categories that have not traditionally been found in their stores, e.g. drug stores increasing food sections) that drive larger stores or urban development which pushes more downsized versions. E-commerce may also drive small locations if retailers stock less but could also result in larger locations if the retailer fulfills their online orders from their stores.
- Form** – e-commerce will likely challenge the power centre form as many consumers will find the same or more selection online with a more convenient shopping experience. Urban development will also impact retail form as developers have to find ways to create more compact developments for smaller development sites.
- Function** – the trend of blurring categories makes measuring supply/demand accurately for merchandise like food difficult.

Other trends such as the fluctuating Canadian dollar, a slowdown in the economy and competition from major malls and suburban power centres could present challenges to main streets and community serving retail areas.

A more detailed description of trends is provided in Appendix B.



## City Planning Policy and Process Conditions Review

A range of policies, finance mechanisms and land use regulations influence the development and redevelopment of commercial space in Calgary. The study evaluates various indicators including the duration of the approval process, commercial development activity, property/business tax rates and business alliances to assess the ease with which retail development occurs. A more detailed overview of this review is outlined in Appendix C. Key findings include:

- It is evident that The City has maintained and even improved its processing efficiency related to commercial development and building permit applications, an effort that supports all types of retail activities.
- Urban development costs in established areas vary considerably based on the specific context of the site and development aims; this can be a barrier to infill redevelopment.
- In Calgary, property tax is a flat rate based on assessment value rather than by area and as such does not provide an incentive to locate in a specific area. The City has made efforts to reduce taxes for businesses (currently lowest rates in past ten years); however, existing system favours large scale retail and dispersed development over local retail and compact development.
- An evaluation of commercial permit activity, based on four size categories, indicates that there is considerable interest in centrally located development, which, by nature, is smaller in scale than in outer suburban locations. This interest in initiating central city retail and commercial activity suggests that there are already a number of incentives (from both the City and market) to locate centrally and that barriers to do so are not insurmountable.
- Business Revitalization Zones (BRZs) play a valuable role in not only supporting local retail, but in establishing a strong connection between community building and economic growth.





### City Planning Policy and Process Conditions Review Outcomes

In summary, based on the evaluation of existing conditions, the study has not recommended any significant changes to planning policy or development application process practices. The study, however outlines three areas of focus to sustain retail viability and improve support for retailers and retail developers. Recommendations are as follows:

- Review and monitor retail viability & success relative to existing policy context and update or amend where necessary.
- Identify cost-effective opportunities to work with and support local actors in promoting local and small scale retail activities.
- Review existing mechanisms to exchange knowledge, information and data among City of Calgary departments. Consider additional ways to promote and coordinate the exchange of tacit knowledge within and across business units and departments.

### Retail Impact Study Review

The study provides guidance for developing a more rigorous retail impact review process and criteria for proposed large scale retail projects.

The Study recommends two alternatives for consideration:

- Alternative 1: A Retail Impact Review. Decision based on a number of factors such as amount of existing retail in the area and better defined parameters for overall demand.
- Alternative 2: Merit/Evaluation System Review. Looks at total community benefit resulting from development, based on a pre-determined strategy. Points are assigned based on the likely benefit to the community where development is to be located.

### Good Practices and Support Tools

The study also provides six case studies from across Canada on how incentives have been used in various jurisdictions to support desired development. This report provides an overview of the approaches, programs and tools in Appendix D which likely have the best transferability to Calgary.

# 3 Future Action Areas

## Focusing on strengths in the market – key areas of opportunity

The study identifies dynamic retail areas and ultimately the factors that determine their successes. These principles will continue to be used in planning programs underway to support successful and dynamic commercial areas and streets.

## Retail Principles for Strong Retail Cores and Vibrant Main Streets

**Certain characteristics support all retail areas.** Safety, cleanliness, sales growth and favourable socioeconomic conditions are important factors for retail success.



**Individual site characteristics play a key role as well.** The length and depth of frontage storefront presentation, store design and layout, parking and attractive outdoor spaces play important roles in supporting retailers.



**Retail on main streets benefit from a number of overarching characteristics.** Area management that supports the interests of local retailers is key, as is good design and planning (length of the street, retail on both sides, quality streetscaping). Effective parking management is also important.



**The right mix of retail amenities can contribute to success.** A specialized focus, variety of retailers (e.g. merchandise, food & convenience) and the quality of the retail are key factors.



### Balancing broader economic factors contributes to success.

The total amount of retail space should reflect demand, as should retail rents. A balanced concentration of competitive and supportive retailers encourages economic sustainability as well.



### Success requires more than just retail.

Walkability and transit access, additional anchors (e.g. libraries, venues) and residential uses that support retail are also important.



While no retail location or individual site can have a high rating on all of these factors, the more of these factors that are in place or are planned to be built in, the more likely the area will serve the target customers and the local community well. In addition, these factors will help ensure that the retailers who occupy this space will be successful.

▼ Figure 6: Principles highlighted for successful, quality retail redevelopment/district

Universal Characteristics	Main Street and Activity Centre Area Characteristics		Individual Site Characteristics
<ul style="list-style-type: none"> <li>■ safety</li> <li>■ cleanliness</li> <li>■ retail sales growth</li> <li>■ favourable socio-economic characteristics</li> </ul>	<ul style="list-style-type: none"> <li>■ area retail management</li> <li>■ length of the main street area</li> <li>■ double loaded retail/width of the roadway</li> <li>■ parking availability and management</li> <li>■ public realm (streetscape, signage and urban plazas)</li> <li>■ vehicles per household</li> <li>■ retail mix composition</li> <li>■ specialized focus</li> <li>■ retail mix(retail merchandise, food service, convenience retail)</li> </ul>	<ul style="list-style-type: none"> <li>■ total amount of retail space</li> <li>■ quality of retail</li> <li>■ additional anchor sites</li> <li>■ walkability and transit access</li> <li>■ retail rents</li> <li>■ location of competitive and supportive retailers</li> <li>■ socio economic characteristics:                             <ul style="list-style-type: none"> <li>▪ 10 minute walk-time population</li> <li>▪ 10 minute drive-time population</li> <li>▪ population growth</li> <li>▪ household income</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>■ space configuration: length of frontage, frontage to depth relationship</li> <li>■ internal characteristics:                             <ul style="list-style-type: none"> <li>▪ ceiling height</li> <li>▪ column spacing</li> </ul> </li> <li>■ storefront presentation</li> <li>■ amount and location of parking</li> <li>■ site:                             <ul style="list-style-type: none"> <li>▪ loading access</li> <li>▪ garbage collection</li> <li>▪ access/egress</li> <li>▪ attractiveness</li> </ul> </li> <li>■ useable outdoor space</li> </ul>

The complete list of the principles and factors used for the evaluation and identification of retail development and areas is outlined in Appendix E.



## Key Areas of Opportunity

**Main streets and activity centres were evaluated and categorized based on their potential for retail.** For the analysis, data was collected and evaluated for main streets and activity centres identified in Calgary's Municipal Development Plan. Various considerations, including the existence of high quality, appropriately located and scaled retail, surrounding community residential densities, development patterns that allow for intensification, adaptation and mixed-use, proximity to high quality transit service, among other things, were evaluated for each area.

Neighbourhood retail streets and centres were broken down into categories: local and destination dominant areas as well as transitioning areas. Local dominant areas tend to serve local surroundings and are convenience retail-oriented. Destination dominant areas attract shoppers from beyond the local trade area.

**Main streets and activity centres have varying characteristics that support or discourage retail and commercial growth.** Strategic choices, based on existing commercial activities, population and accessibility can be made to take full advantage of commercial and retail activities.

**The study concluded that retail and commercial activity is well-balanced across the city.** Targeted development can enhance this balance where necessary.



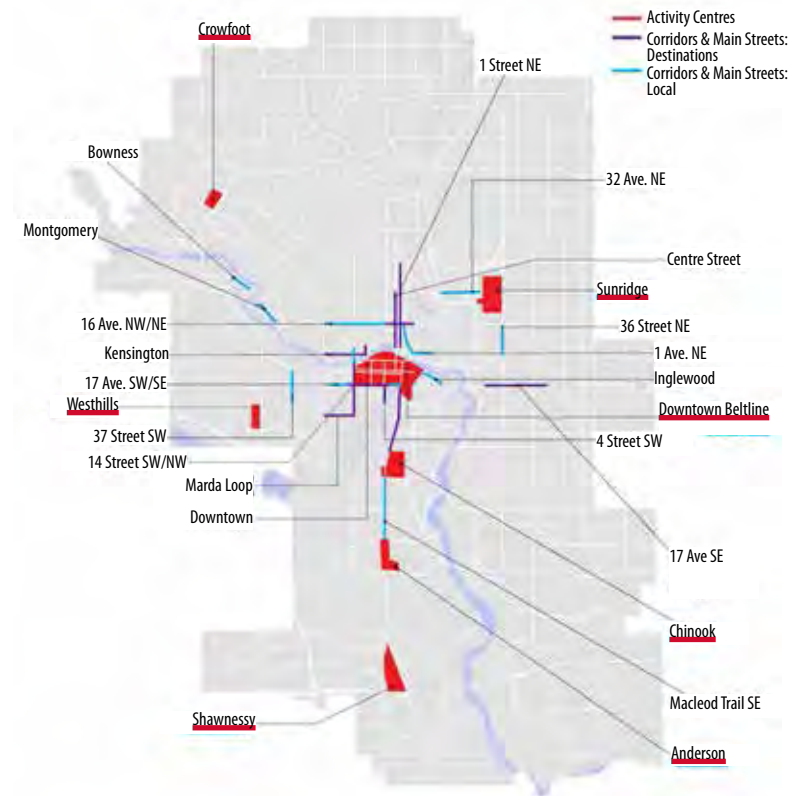
## Retail Priorities

Using an evaluation model based on the principles described, the City-designated main streets and activity centres were evaluated and categorized based on their potential for retail. Map 1 Retail Priority Areas and Figure 7 shows the main streets and activity centres with the most favourable retail conditions. Those areas that are designated as local dominant tend to include more convenience oriented retailers. The areas that are designated as destination dominant tend to attract shoppers from beyond the local trade area. Usually these areas have some unique appeal that make a longer shopping trip worthwhile.

The evaluation model that generated the rankings for all of the mainstreets and activity centres are meant to inform goals for particular areas. It is important to emphasize that these rankings can change with the entry or exit of significant retailers or new developments so these evaluations are meant to be dynamic as new information becomes available. However, the principles of what makes a strong retail environment do not change dramatically.



▼ Map 1: Retail Priority Areas



▼ Figure 7: Main Streets and Activity Centres with most favourable retail conditions

**Main Streets**

<b>Local Dominant</b>	<b>Destination Dominant</b>	<b>Transitioning</b>	<b>Not Significant Continuous Retail</b>
<ul style="list-style-type: none"> <li>■ Kensington</li> <li>■ 17 Avenue SW – 10 Street to 3 Street</li> <li>■ 4 Street SW</li> <li>■ 17 Avenue SW – 16 Street to 10 Street</li> <li>■ Marda Loop</li> <li>■ Centre Street – 16 Avenue to 8 Avenue</li> <li>■ Centre Street – 30 Avenue to 8 Avenue</li> <li>■ 1 Street NE</li> <li>■ 16 Avenue NW NE – 4 Street NW to 6 Street NE</li> </ul>	<ul style="list-style-type: none"> <li>■ Inglewood</li> <li>■ 17 Avenue – 3 Street to Macleod</li> <li>■ 16 Avenue NW – Banff Trail to 14 Street NW</li> <li>■ 37 Street SW</li> <li>■ 17 Avenue SE</li> <li>■ 14 Street SW</li> <li>■ Edmonton Trail – 3 Avenue to Memorial</li> <li>■ 16 Avenue NW – 14 Street to 4 Street</li> <li>■ 17 Avenue SW – Crowfoot to 16 Street</li> <li>■ 14 Street NW</li> <li>■ Macleod Trail South – Heritage to Southland</li> <li>■ Bowness</li> <li>■ Macleod Trail South – Glenmore to Heritage</li> <li>■ Montgomery</li> <li>■ 36 Street NE</li> <li>■ Macleod Trail Centre</li> <li>■ Edmonton Trail – 16 Avenue to 5 Avenue</li> <li>■ 32 Avenue NE</li> </ul>	<ul style="list-style-type: none"> <li>■ 10 Avenue SW</li> <li>■ 14 Street SW – Centre</li> <li>■ 14 Street SW</li> </ul>	<ul style="list-style-type: none"> <li>■ 4 Street NW</li> <li>■ 50 Avenue SW</li> <li>■ Montgomery 16 Avenue</li> <li>■ Richmond Road</li> <li>■ Centre Street Thorncrest to 30 Avenue</li> <li>■ Edmonton Trail 34 Avenue to 16 Avenue</li> <li>■ 17 Avenue SW – 37 Street to Crowchild</li> </ul>

**Activity Centres**

<b>Local Dominant</b>	<b>Destination Dominant</b>	<b>Transitioning</b>	<b>Not Significant Continuous Retail</b>
<ul style="list-style-type: none"> <li>■ Westhills</li> <li>■ Crowfoot</li> </ul>	<ul style="list-style-type: none"> <li>■ Downtown / Beltline</li> <li>■ Shawnessy</li> <li>■ Anderson</li> <li>■ Chinook</li> <li>■ Sunridge</li> </ul>	<ul style="list-style-type: none"> <li>■ Seton</li> </ul>	<ul style="list-style-type: none"> <li>■ University</li> <li>■ Mount Royal</li> </ul>

**Note:** It should also be noted that these evaluations relate to retail/commercial only.

## Key Challenges: Reducing Retail Development Risks

Some of the common barriers to retail development are outlined below with some mitigation strategies. While The City may not be able to implement these strategies directly, we can influence many of them through the decisions that we make, e.g. supporting the development of Business Revitalization Zones.

**Low retail rents and small market sizes can be addressed through multiple strategies.** Local area management (e.g. BRZ), an anchor activity, lower retail development costs, more residents and improved accessibility can improve the economic health of local retail.

**A safe setting is key to successful retail.** Increasing the reality of safety (e.g. police presence) and feeling of safety (e.g. lighting) are important factors for vibrant retail areas.

**Attractive built form can enhance retail.** Non-public uses can be regulated, while new retailers can be directed towards dense blocks.

**Quality is key.** Local area management, high standards and regular improvement and maintenance eliminate this barrier.





## Retail Strategy Objectives

Aligned to Calgary's Municipal Development Plan direction and other corporate goals, the study identifies three strategic objectives for the Calgary retail and commercial strategy.

These are:

- A high quality in retail environments - Create and/or reinforce settings where people want to spend time.
- Good access to retail that meets the needs of Calgarians.
- Use existing infrastructure in the most efficient ways possible. Where possible, maximize returns on existing investments, rather than building new infrastructure.

These strategic objectives, along with the key findings from this study directed the recommendations for specific actions outlined in the next section.



## Recommended Approach and Actions

In order to implement the strategy described above, The City is already or should undertake efforts in three areas that affect retail and commercial business growth and prosperity. These include:

- 1 Make it easy and attractive to do business in Calgary by providing technical and other support to existing & new retail and commercial businesses.**

### 1.1 Better Support development proposals that meet City goals.

Explore and develop policies, land use regulations and finance mechanisms that support retail and commercial developments at specific geographic locations. This includes:

- **Investigate opportunities to support and reduce uncertainty related to mixed-use development.** Monitor and provide information detailing total costs of recent development projects on main streets and activity centres to gain more awareness related to expected overall development costs of redevelopment and share with industry. Continue to consult with industry to better understand desired incentives and to reform regulatory hurdles that inadvertently restrict retail development in mixed-use projects.
- **Supporting more efficient business planning regulation and processes in priority areas** to reduce the developers' costs. Support initiatives that remove barriers to redevelopment and that can reduce the time for developments that further City goals to get approved. The process should include all departments, not just planning, since roadblocks from other city departments can delay preferred developments.
  - City initiated land use redesignations within planning priority areas as identified through the mainstreets program support this recommendation.

### 1.2 Maintain and expand support for neighbourhood & community serving businesses.

Identify cost-effective opportunities to work with and support local actors in promoting local and small scale retail activities, Business Revitalizations Zones are a leading example. Explore and encourage a range of development models, and policy and regulation reform where necessary, to encourage flexibility and new businesses in key locations. In areas where new policy and regulation are developed, ensure that the unique nature of different communities retail areas is reflected in planning initiatives.

### 1.3 Review City fees.

Investigate development fees, specifically for smaller scale commercial and retail redevelopments within neighbourhood and larger community serving retail and commercial areas.

## 2 Pursue comprehensive, integrated planning tied to City goals and investment.

### 2.1 Prioritize areas for redevelopment.

Continue to focus on identifying, planning and investing in strategic priority areas. The best place for retail redevelopment is where there is already strong retail.

### 2.2 Improve access to updated information.

Review existing mechanisms to exchange knowledge, information and data related to retail success. Consider additional ways to promote and coordinate the exchange of knowledge, based on data and finding of study.

### 2.3 Recognize where there are needs for greenfield retail development.

From the research, the sectors of the City that appear to have unmet needs are the West and the Southeast, which both have lower square footage per capita and relatively higher projected population growth rates. Additionally, review how new retail development is justified. Develop a more comprehensive Retail Impact Review process for proposed large scale retail projects.



### **3** Commit to ongoing research, exploration and monitoring to inform planning, support innovation and respond to needs of the evolving market.

#### **3.1** Continue to monitor retail trends and retail development, measure results and make improvements.

To make the most of the extensive research and analysis conducted for this study, continue fine-tuning and measuring the results. Review and monitor retail viability & success relative to existing policy context and update or amend where necessary.

##### **■ Update the retail inventory**

The retail inventory delivered by this study is one of the most detailed in Canada. It allows City departments to analyze retail data on the amount of retail, size of spaces, and the category of retailers by detailed geographic areas. The issue about retail is that it is always changing. Retail markets are in a state of constant change however. Regular updates will ensure that metrics for success remain focused and relevant.

New retailers are always entering markets and other retailers are leaving. Since this is a particularly dynamic time for the retail industry, it will be important to continue to update the inventory at least every three years. The inventory will be an important tool in providing data to measure commercial achievements.

##### **■ Track commercial development projects**

Develop a template for all City departments so that data collected will be comparable. The template will relate directly to the metrics so development size, location, etcetera must be collected in the same manner. A clear set of consistent definitions should be created to ensure uniformity of the data.

#### **3.2** Continue to review main streets and activity centres.

The evaluation model and noted principles provided in the study helped prioritize areas for commercial development. The factors are dynamic however; and should be revisited on a regular basis. In order to make the most of the work that has been done, continue to make improvements and then measure performance against pre-set metrics.

##### **■ Establish metrics that define what success looks like and the role that main streets and activity centres will play in achieving it.**

Metrics that can be used include the number of mixed use projects, percent of City's retail in retail focus areas, number of new infill projects, share of development that is infill or mixed use, increase of retail in focus areas and total cost of development projects in focus areas. These metrics will help the City assess what programs are successful and which ones are not. Without clear measurements the success of programs will be based on opinion not fact. Metrics for achievement will ensure that financial investments that the City makes pay off.

#### **3.3** Consider the need for parking to support retail.

Developments with inadequate parking will be challenged to attract shoppers and will likely fail. This may change in the future but for now parking is essential for retail developments.



## Conclusions

The Retail Commercial Study and Strategy will help inform City development projects and policy development programs. Moving forward, the recommended approach is to work with City staff to implement identified actions. This will be accomplished by offering opportunities to further share key findings and data in the study and building support for:

**Developing collaboration capacity:** raising awareness about the vital role of retail and commercial development in community building.

**Integrating planning approaches and strategy:** Calgary already has comprehensive planning and broader corporate strategies that recognize links among urban form, land use and infrastructure. This Study highlights best practices and strategic priority areas for integrated planning opportunities and capacity to build on this.

**Research and information sharing:** drawing on research and data to support a retail sector that grows and develops, and is able to respond quickly to challenges as they arise.

Much of this work is already underway. The strategy proposed goes beyond developing local area plans and improving development approval efficiencies and processes. Given the significant supply of retail and commercial development there will be competing demands. The strategy draws on research and data to illustrate a snapshot of Calgary's retail landscape and to provide insight of its retail potential and areas of opportunity. There is a need to optimize planning decisions so that outcomes are strategic and balanced, and support a competitive and strong economy and at the same time community building and good quality of life in our neighbourhoods.



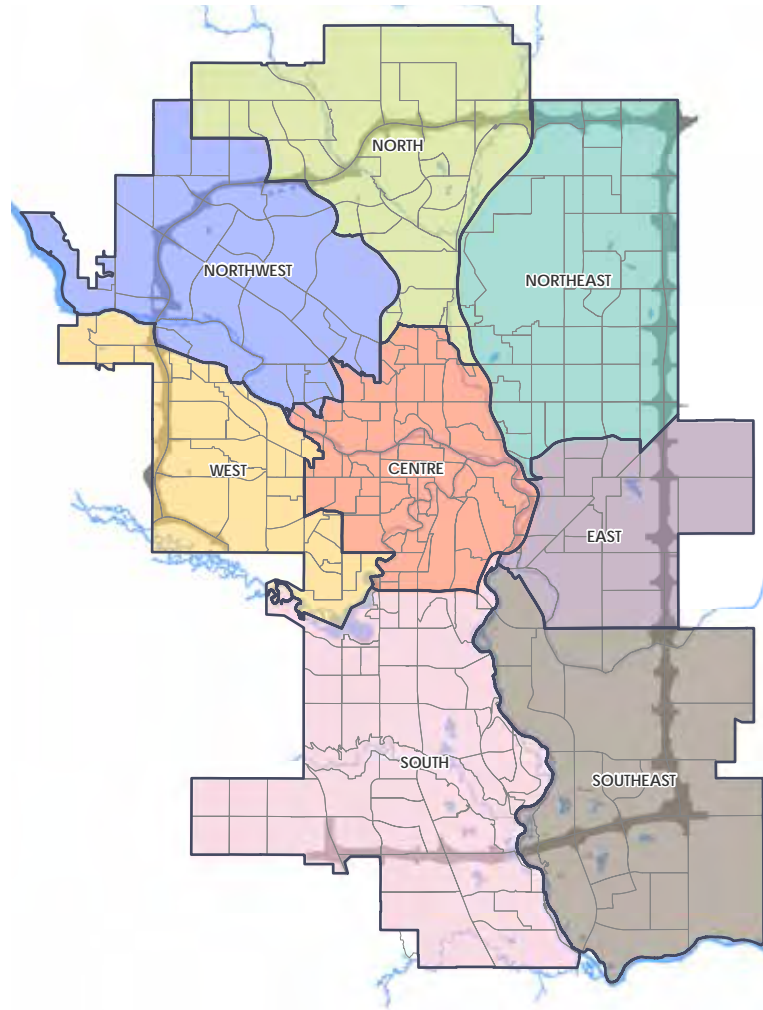


# 4 Appendices

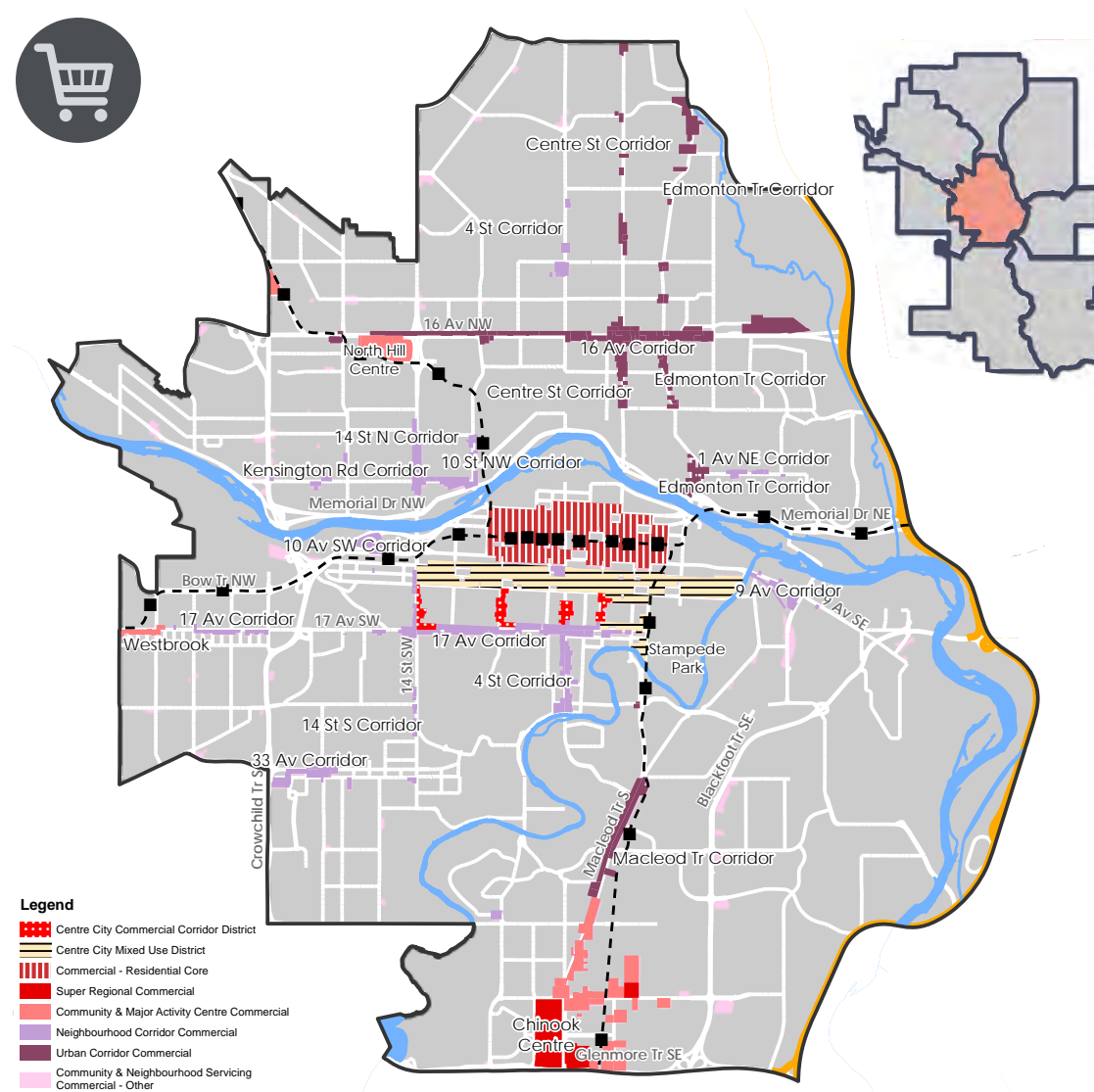
## Appendix A – Sector Profiles

Source: J.C. Williams Group

▼ Map 2: Calgary Sector Profiles

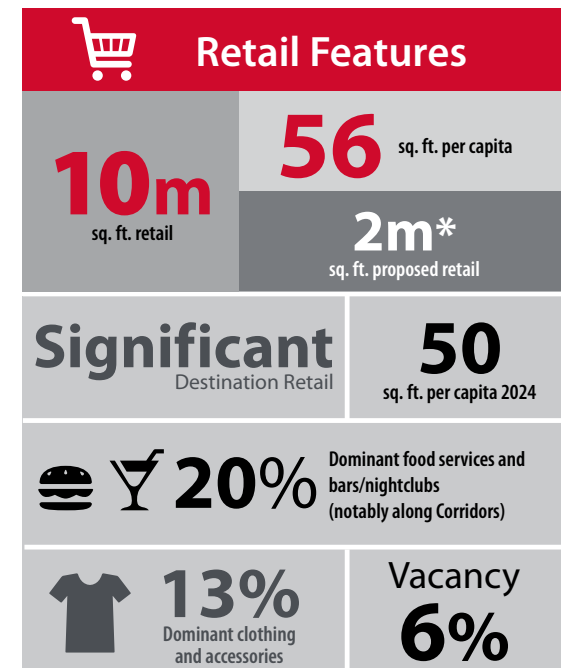


▼ Map 3: Centre Retail Sector



### Key Socio-Economic Facts

- Significant population and high population growth.
- Smaller household Size + higher spending power.
- Young adult and older (empty nester) oriented.
- Varied household Incomes: low, moderate, high.
- High proportion of singles.
- Largest employment sector including downtown.



\*Updated July 2016, City of Calgary



▼ Table 1: Centre Retail Sector – Details

	Centre	Calgary
2014 Est. Population	181,425	1,149,389
2024 Proj. Population	215,841	1,343,453
Annual Growth rate (2014-2024)	1.75%	1.57%
Persons per families	2.7	n/a
Children per family	0.8	1.1
<b>Age Profile</b>		
<14 years	10.7%	17.5%
15 - 24	13.2%	12.5%
25 - 34	19.9%	15.1%
35 - 44	15.5%	15.2%
45 - 54	14.7%	15.1%
55 - 64	12.3%	13.0%
65 +	13.6%	11.6%
Average Age	41.5	39.2
<b>Household Income</b>		
<\$20,000	17.1%	9.9%
\$20,000 - \$39,999	21.7%	16.7%
\$40,000 - \$59,999	18.8%	17.7%
\$60,000 - \$79,999	11.9%	15.0%
\$80,000 - \$99,999	7.9%	11.7%
\$100,000 +	21.4%	29.0%
Average income (\$)	\$50,658	\$67,477
Median Income (\$)	\$81,336	\$91,029
<b>Jobs</b>		
Total Jobs	42%	
Agriculture	3%	
Industrial	42%	
Warehouse	36%	
Retail	33%	
Private Services	52%	
Government	63%	
Education	29%	
<b>Marital Status</b>		
Married/Common law	47%	57%
Single (take out common law)	34%	28%
Widowed/divorced/separated	18%	15%
<b>Language at Home</b>		
English	80%	69%
French	2%	2%
Non-official Languages	17%	29%

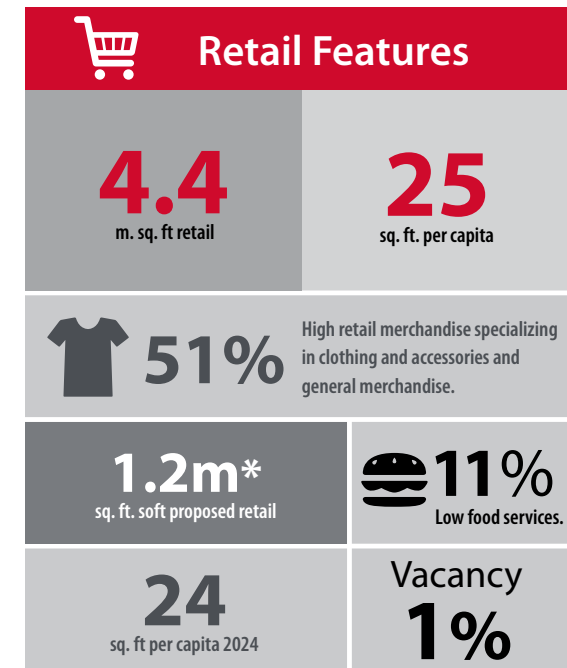
	Retail Square Footage	Percentage Square Footage	Store Count	Average Store Size
<b>GAFO (General Merchandise, Apparel and Accessories, Furniture and Other Sales)</b>				
Furniture and Home Furnishings Stores	345,550	3.5%	121	2,856
Electronics and Appliance Stores	111,050	1.1%	47	2,363
Clothing and Clothing Accessories Stores	1,307,200	13.1%	368	3,552
Sporting Goods, Hobby, Book and Music Store	380,550	3.8%	121	3,145
General Merchandise Stores and Dollar Stores	754,950	7.6%	12	62,913
<b>Total GAFO</b>	<b>2,899,300</b>	<b>29.1%</b>	<b>669</b>	<b>4,334</b>
Home Improvement, Building Material and Garden Equipment	282,200	2.8%	19	14,853
Miscellaneous Stores	377,450	3.8%	215	1,756
<b>Total Retail Merchandise</b>	<b>3,558,950</b>	<b>35.8%</b>	<b>903</b>	<b>3,941</b>
<b>Food Services</b>				
Food Services and Restaurants	1,802,550	18.1%	1,061	1,699
Bar and Night Club	228,850	2.3%	57	4,015
<b>Total Food Services</b>	<b>2,031,400</b>	<b>20.4%</b>	<b>1,118</b>	<b>1,817</b>
<b>Convenience Retail</b>				
Food and Beverage Stores	632,500	6.4%	270	2,343
Liquor Stores	154,150	1.5%	79	1,951
Health and Personal Care Stores	293,300	2.9%	126	2,328
<b>Total Convenience Retail</b>	<b>1,079,950</b>	<b>10.9%</b>	<b>475</b>	<b>2,274</b>
<b>Personal Services</b>				
Hair and Beauty Services	432,350	4.3%	360	1,201
Personal Household Services	66,550	0.7%	74	899
<b>Total Personal Services</b>	<b>498,900</b>	<b>5.0%</b>	<b>434</b>	<b>1,150</b>
<b>Financial And Telecom</b>				
Financial and Insurance Services	265,350	2.7%	76	3,491
Postal, Courier, Telecom, and Cable Services	46,600	0.5%	51	914
<b>Total Financial And Telecom</b>	<b>311,950</b>	<b>3.1%</b>	<b>127</b>	<b>2,456</b>
<b>Professional And Other Services</b>				
Business Services	264,950	2.7%	149	1,778
Health Services	513,800	5.2%	283	1,816
Recreation Services	467,300	4.7%	82	5,699
Other Services	654,150	6.6%	307	2,131
<b>Total Professional And Other Services</b>	<b>1,900,200</b>	<b>19.1%</b>	<b>821</b>	<b>2,314</b>
<b>Total Retail</b>	<b>9,381,350</b>	<b>94.3%</b>	<b>3,878</b>	<b>2,419</b>
Vacant	569,150	5.7%	220	2,587
<b>Total</b>	<b>9,950,500</b>	<b>100%</b>	<b>4,098</b>	<b>2,428</b>
Automotive	330,750		91	3,635
Gas Stations	22,500		25	900
<b>TOTAL ALL</b>	<b>10,303,750</b>			

▼ Map 4: Northwest Retail Sector



### Key Socio-Economic Facts

- Significant Population and Low Population Growth, Stable Neighbourhoods.
- High Proportion Older Married Families with Younger and Older Children.
- Predominantly Higher Household Income.
- Low Employment except for Education Related (University of Calgary).

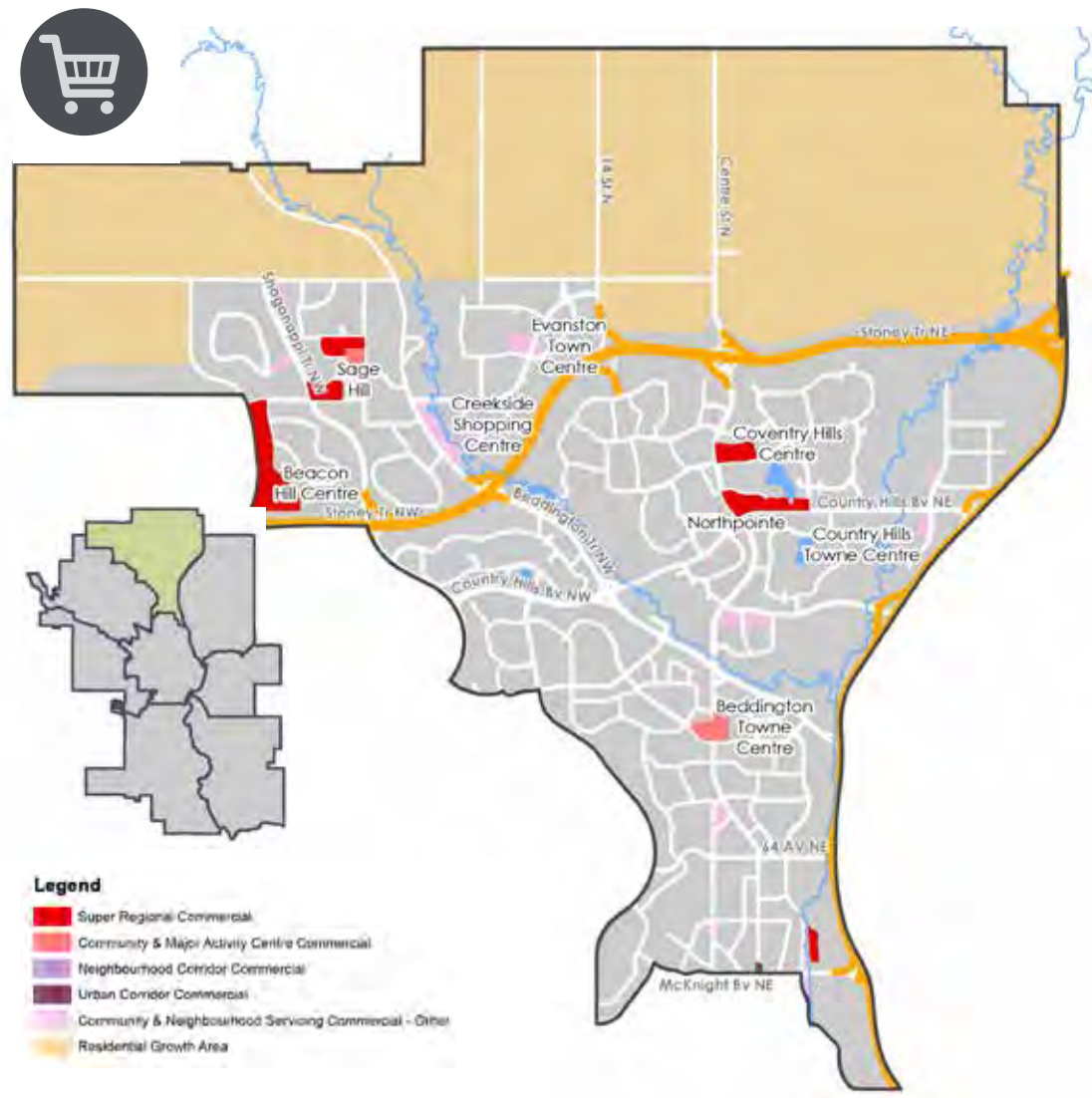


\*Updated July 2016, City of Calgary

▼ Table 2: Northwest Retail Sector – Details

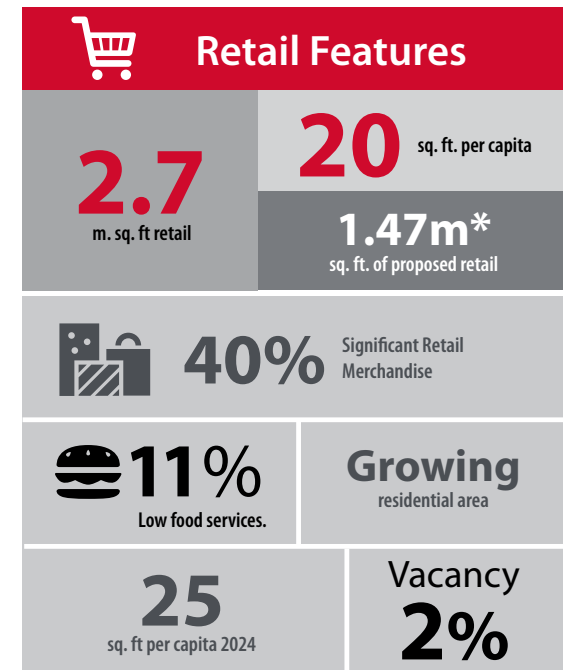
	Retail Square Footage	Percentage Square Footage	Store Count	Average Store Size
<b>GAF0 (General Merchandise, Apparel and Accessories, Furniture and Other Sales)</b>				
Furniture and Home Furnishings Stores	268,100	6.2%	29	9,245
Electronics and Appliance Stores	107,750	2.5%	16	6,734
Clothing and Clothing Accessories Stores	492,950	11.3%	132	3,734
Sporting Goods, Hobby, Book and Music Store	194,450	4.5%	37	5,255
General Merchandise Stores and Dollar Stores	724,150	16.6%	11	65,832
<b>Total GAF0</b>	<b>1,787,400</b>	<b>41.0%</b>	<b>225</b>	<b>7,944</b>
Home Improvement, Building Material and Garden Equipment	291,800	6.7%	10	29,180
Miscellaneous Stores	119,000	2.7%	47	2,532
<b>Total Retail Merchandise</b>	<b>2,198,200</b>	<b>50.4%</b>	<b>282</b>	<b>7,795</b>
<b>Food Services</b>				
Food Services and Restaurants	403,750	9.3%	244	1,655
Bar and Night Club	66,300	1.5%	14	4,736
<b>Total Food Services</b>	<b>470,050</b>	<b>10.8%</b>	<b>258</b>	<b>1,822</b>
<b>Convenience Retail</b>				
Food and Beverage Stores	663,100	15.2%	75	8,841
Liquor Stores	84,550	1.9%	25	3,382
Health and Personal Care Stores	188,450	4.3%	47	4,010
<b>Total Convenience Retail</b>	<b>936,100</b>	<b>21.5%</b>	<b>147</b>	<b>6,368</b>
<b>Personal Services</b>				
Hair and Beauty Services	131,700	3.0%	109	1,208
Personal Household Services	19,500	0.4%	20	975
<b>Total Personal Services</b>	<b>151,200</b>	<b>3.4%</b>	<b>129</b>	<b>1,172</b>
<b>Financial And Telecom</b>				
Financial and Insurance Services	91,450	2.1%	24	3,810
Postal, Courier, Telecom, and Cable Services	19,900	0.5%	21	948
<b>Total Financial And Telecom</b>	<b>111,350</b>	<b>2.6%</b>	<b>45</b>	<b>2,474</b>
<b>Professional And Other Services</b>				
Business Services	64,100	1.5%	37	1,732
Health Services	158,350	3.6%	87	1,820
Recreation Services	132,250	3.0%	20	6,613
Other Services	89,900	2.1%	52	1,729
<b>Total Professional And Other Services</b>	<b>444,600</b>	<b>10.2%</b>	<b>196</b>	<b>2,268</b>
<b>Total Retail</b>	<b>4,311,500</b>	<b>99.0%</b>	<b>1,057</b>	<b>4,079</b>
Vacant	45,700	1.0%	27	1,693
<b>Total</b>	<b>4,357,200</b>	<b>100%</b>	<b>1,084</b>	<b>4,020</b>
Automotive	54,450		27	2,017
Gas Stations	16,700		18	928
<b>TOTAL ALL</b>	<b>4,428,350</b>			

▼ Map 5: North Retail Sector



### Key Socio-Economic Facts

- Sizeable Population and High Population Growth.
- Young Families with Young Children.
- High Proportion Married Families with Young children.
- Mid to High Household Income.
- Low Employment.



Retail geared to growing families.

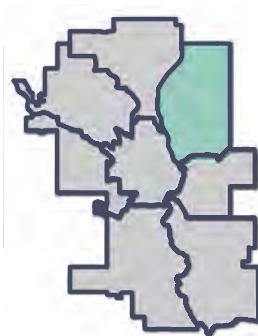
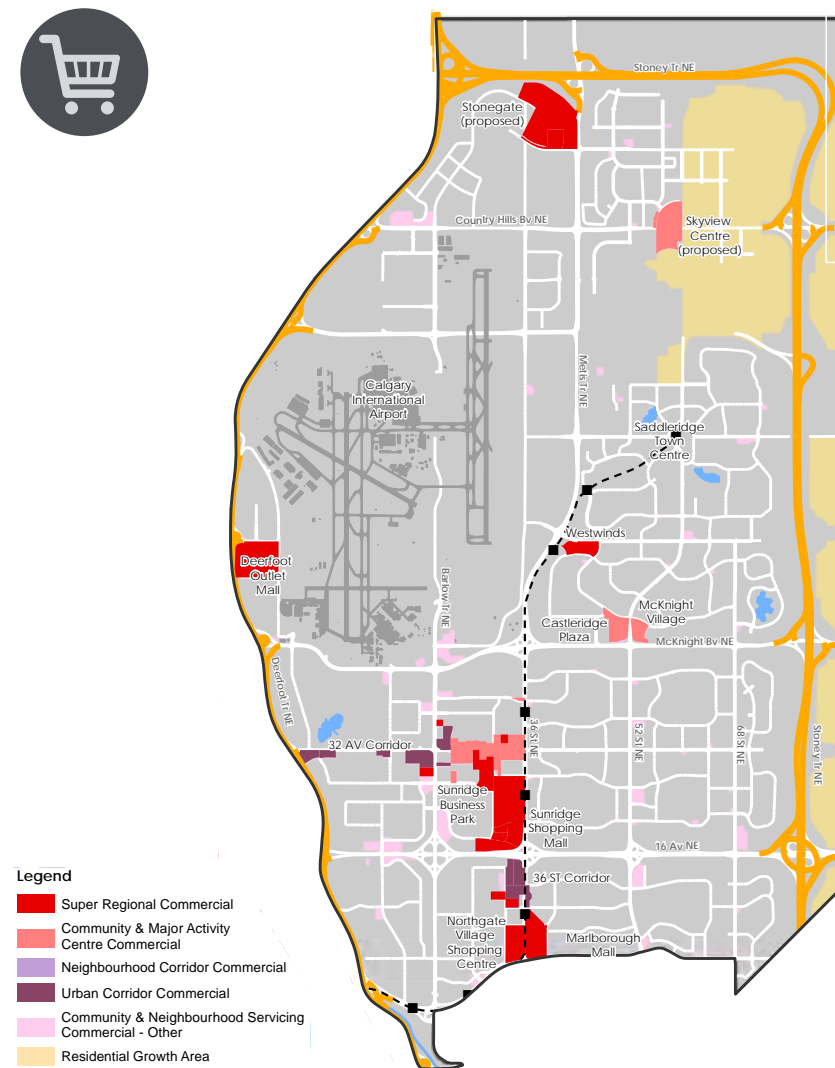
\*Updated July 2016, City of Calgary



▼ Table 3: North Retail Sector – Details

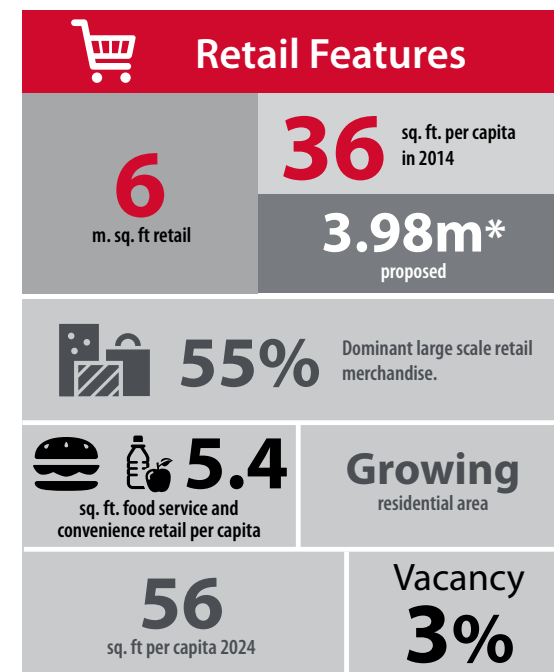
	Retail Square Footage	Percentage Square Footage	Store Count	Average Store Size
<b>GAFO (General Merchandise, Apparel and Accessories, Furniture and Other Sales)</b>				
Furniture and Home Furnishings Stores	81,200	3.0%	12	6,767
Electronics and Appliance Stores	55,500	2.0%	6	9,250
Clothing and Clothing Accessories Stores	156,350	5.7%	22	7,107
Sporting Goods, Hobby, Book and Music Store	107,150	3.9%	11	9,741
General Merchandise Stores and Dollar Stores	425,250	15.6%	11	38,659
<b>Total GAFO</b>	<b>825,450</b>	<b>30.2%</b>	<b>62</b>	<b>13,314</b>
Home Improvement, Building Material and Garden Equipment	244,550	9.0%	7	34,936
Miscellaneous Stores	71,150	2.6%	18	3,953
<b>Total Retail Merchandise</b>	<b>1,141,150</b>	<b>41.8%</b>	<b>87</b>	<b>13,117</b>
<b>Food Services</b>				
Food Services and Restaurants	239,850	8.8%	131	1,831
Bar and Night Club	47,300	1.7%	11	4,300
<b>Total Food Services</b>	<b>287,150</b>	<b>10.5%</b>	<b>142</b>	<b>2,022</b>
<b>Convenience Retail</b>				
Food and Beverage Stores	506,550	18.6%	45	11,257
Liquor Stores	73,250	2.7%	22	3,330
Health and Personal Care Stores	117,200	4.3%	19	6,168
<b>Total Convenience Retail</b>	<b>697,000</b>	<b>25.5%</b>	<b>86</b>	<b>8,105</b>
<b>Personal Services</b>				
Hair and Beauty Services	63,450	2.3%	54	1,175
Personal Household Services	18,400	0.7%	15	1,227
<b>Total Personal Services</b>	<b>81,850</b>	<b>3.0%</b>	<b>69</b>	<b>1,186</b>
<b>Financial And Telecom</b>				
Financial and Insurance Services	108,650	4.0%	28	3,880
Postal, Courier, Telecom, and Cable Services	11,600	0.4%	11	1,055
<b>Total Financial And Telecom</b>	<b>120,250</b>	<b>4.4%</b>	<b>39</b>	<b>3,083</b>
<b>Professional And Other Services</b>				
Business Services	13,150	0.5%	10	1,315
Health Services	132,150	4.8%	70	1,888
Recreation Services	75,900	2.8%	14	4,421
Other Services	131,100	4.8%	38	3,450
<b>Total Professional And Other Services</b>	<b>352,300</b>	<b>12.9%</b>	<b>132</b>	<b>2,669</b>
<b>Total Retail</b>	<b>2,679,700</b>	<b>98.2%</b>	<b>555</b>	<b>4,828</b>
Vacant	49,100	1.8%	25	1,964
<b>Total</b>	<b>2,728,800</b>	<b>100%</b>	<b>580</b>	<b>4,705</b>
Automotive	65,900		29	2,272
Gas Stations	10,150		15	677
<b>TOTAL ALL</b>	<b>2,804,850</b>			

▼ Map 6: Northeast Retail Sector



**Key Socio-Economic Facts**

- Sizeable Population and Modest Population Growth.
- Older Families with Young Children.
- High Proportion Married Families with Young children.
- Moderate to High Household Income.
- Sizeable Employment.

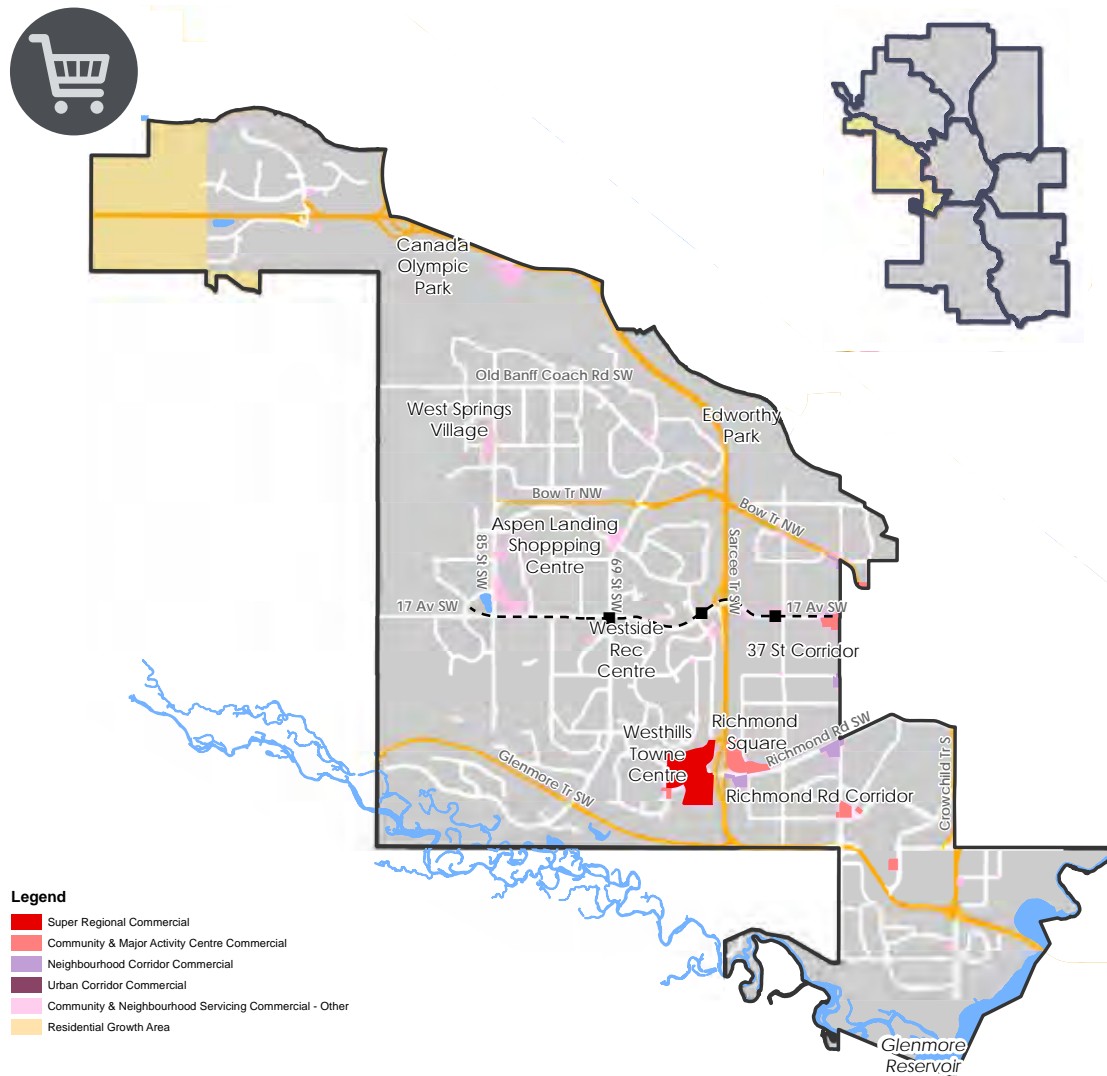


\*Updated July 2016, City of Calgary

▼ Table 4: Northeast Retail Sector – Details

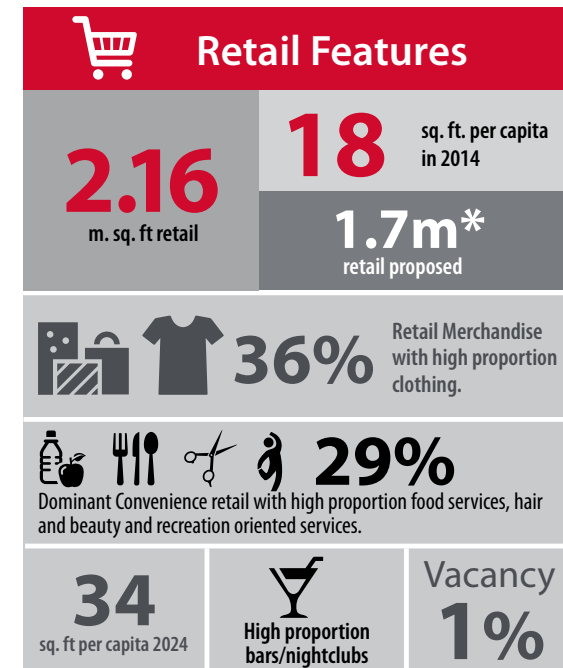
	Retail Square Footage	Percentage Square Footage	Store Count	Average Store Size
<b>GAFO (General Merchandise, Apparel and Accessories, Furniture and Other Sales)</b>				
Furniture and Home Furnishings Stores	473,550	7.8%	51	9,285
Electronics and Appliance Stores	145,100	2.4%	2	72,550
Clothing and Clothing Accessories Stores	493,100	8.1%	125	3,945
Sporting Goods, Hobby, Book and Music Store	239,200	3.9%	22	10,873
General Merchandise Stores and Dollar Stores	1,288,900	21.2%	24	53,704
<b>Total GAFO</b>	<b>2,639,850</b>	<b>43.5%</b>	<b>224</b>	<b>11,785</b>
Home Improvement, Building Material and Garden Equipment	472,200	7.8%	23	20,530
Miscellaneous Stores	203,950	3.4%	57	3,578
<b>Total Retail Merchandise</b>	<b>3,316,000</b>	<b>54.6%</b>	<b>304</b>	<b>10,908</b>
<b>Food Services</b>				
Food Services and Restaurants	524,750	8.6%	272	1,929
Bar and Night Club	18,100	0.3%	6	3,017
<b>Total Food Services</b>	<b>542,850</b>	<b>8.9%</b>	<b>278</b>	<b>1,953</b>
<b>Convenience Retail</b>				
Food and Beverage Stores	634,900	10.5%	78	8,140
Liquor Stores	83,650	1.4%	32	2,614
Health and Personal Care Stores	220,450	3.6%	54	4,082
<b>Total Convenience Retail</b>	<b>939,000</b>	<b>15.5%</b>	<b>164</b>	<b>5,726</b>
<b>Personal Services</b>				
Hair and Beauty Services	104,650	1.7%	83	1,296
Personal Household Services	17,250	0.3%	17	1,015
<b>Total Personal Services</b>	<b>121,900</b>	<b>2.0%</b>	<b>100</b>	<b>1,219</b>
<b>Financial And Telecom</b>				
Financial and Insurance Services	151,500	2.5%	36	4,208
Postal, Courier, Telecom, and Cable Services	33,250	0.5%	45	739
<b>Total Financial And Telecom</b>	<b>184,750</b>	<b>3.0%</b>	<b>81</b>	<b>2,281</b>
<b>Professional And Other Services</b>				
Business Services	75,000	1.2%	41	1,829
Health Services	175,450	2.9%	78	2,249
Recreation Services	213,650	3.5%	17	12,568
Other Services	313,500	5.2%	113	2,774
<b>Total Professional And Other Services</b>	<b>777,600</b>	<b>12.8%</b>	<b>249</b>	<b>3,123</b>
<b>Total Retail</b>	<b>5,882,100</b>	<b>96.9%</b>	<b>1,176</b>	<b>5,002</b>
Vacant	186,850	3.1%	72	2,595
<b>Total</b>	<b>6,068,950</b>	<b>100%</b>	<b>1,248</b>	<b>4,863</b>
Automotive	201,450		47	4,286
Gas Stations	7,650		11	695
<b>TOTAL ALL</b>	<b>6,278,050</b>			

▼ Map 7: West Retail Sector



### Key Socio-Economic Facts

- Moderate Sized Population and High Population Growth.
- Mostly Older Families with Young and Older Children.
- High Household Income.
- Low Employment District except Education (Mount Royal College).



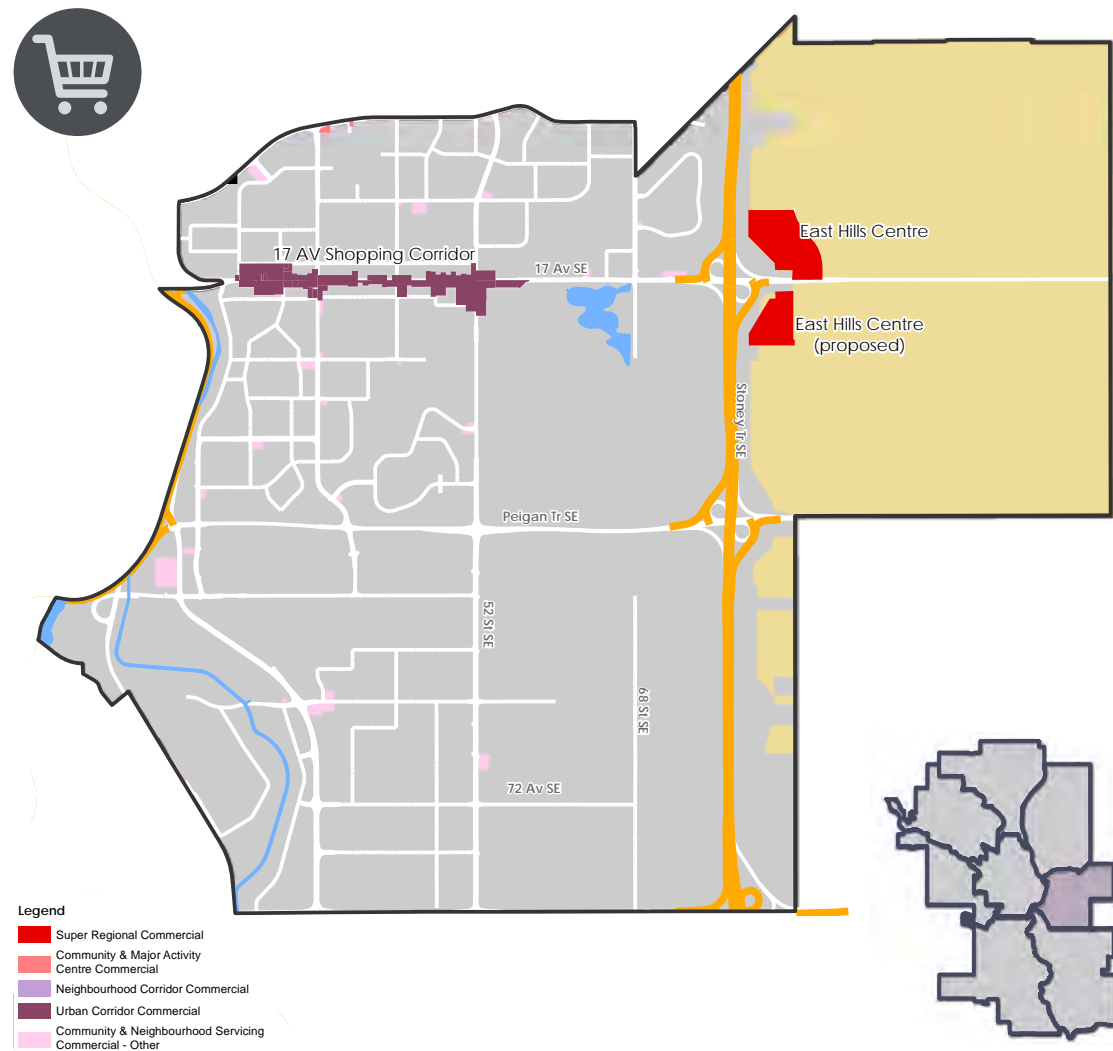
\*Updated July 2016, City of Calgary



▼ Table 5: West Retail Sector – Details

	Retail Square Footage	Percentage Square Footage	Store Count	Average Store Size
<b>GAFO (General Merchandise, Apparel and Accessories, Furniture and Other Sales)</b>				
Furniture and Home Furnishings Stores	77,350	3.6%	14	5,525
Electronics and Appliance Stores	42,000	1.9%	9	4,667
Clothing and Clothing Accessories Stores	212,350	9.8%	54	3,932
Sporting Goods, Hobby, Book and Music Store	71,400	3.3%	8	8,925
General Merchandise Stores and Dollar Stores	273,700	12.6%	8	34,213
<b>Total GAFO</b>	<b>676,800</b>	<b>31.2%</b>	<b>93</b>	<b>7,277</b>
Home Improvement, Building Material and Garden Equipment	39,000	1.8%	3	13,000
Miscellaneous Stores	60,300	2.8%	25	2,412
<b>Total Retail Merchandise</b>	<b>776,100</b>	<b>35.8%</b>	<b>121</b>	<b>6,414</b>
<b>Food Services</b>				
Food Services and Restaurants	232,050	10.7%	135	1,719
Bar and Night Club	30,600	1.4%	5	6,120
<b>Total Food Services</b>	<b>262,650</b>	<b>12.1%</b>	<b>140</b>	<b>1,876</b>
<b>Convenience Retail</b>				
Food and Beverage Stores	482,000	22.2%	54	8,926
Liquor Stores	33,250	1.5%	18	1,847
Health and Personal Care Stores	102,600	4.7%	27	3,800
<b>Total Convenience Retail</b>	<b>617,850</b>	<b>28.5%</b>	<b>99</b>	<b>6,241</b>
<b>Personal Services</b>				
Hair and Beauty Services	88,450	4.1%	67	1,320
Personal Household Services	8,350	0.4%	11	759
<b>Total Personal Services</b>	<b>96,800</b>	<b>4.5%</b>	<b>78</b>	<b>1,241</b>
<b>Financial And Telecom</b>				
Financial and Insurance Services	110,350	5.1%	27	4,087
Postal, Courier, Telecom, and Cable Services	8,350	0.4%	10	835
<b>Total Financial And Telecom</b>	<b>118,700</b>	<b>5.5%</b>	<b>37</b>	<b>3,208</b>
<b>Professional And Other Services</b>				
Business Services	12,800	0.6%	10	1,280
Health Services	127,400	5.9%	71	1,794
Recreation Services	95,750	4.4%	12	7,979
Other Services	46,700	2.2%	32	1,459
<b>Total Professional And Other Services</b>	<b>282,650</b>	<b>13.0%</b>	<b>125</b>	<b>2,261</b>
<b>Total Retail</b>	<b>2,154,750</b>	<b>99.4%</b>	<b>600</b>	<b>3,591</b>
Vacant	12,650	0.6%	11	1,150
<b>Total</b>	<b>2,167,400</b>	<b>100%</b>	<b>611</b>	<b>3,547</b>
Automotive	27,650		7	3,950
Gas Stations	5,550		10	555
<b>TOTAL ALL</b>	<b>2,200,600</b>			

▼ Map 8: East Retail Sector



**Key Socio-Economic Facts**

- Low Population (less than 60,000 residents).
- Moderate to High Population Growth.
- Mostly Older Residents and Older Families with Older Children.
- Low to Moderate Household Income.
- High Separated/Divorced/Widowed.



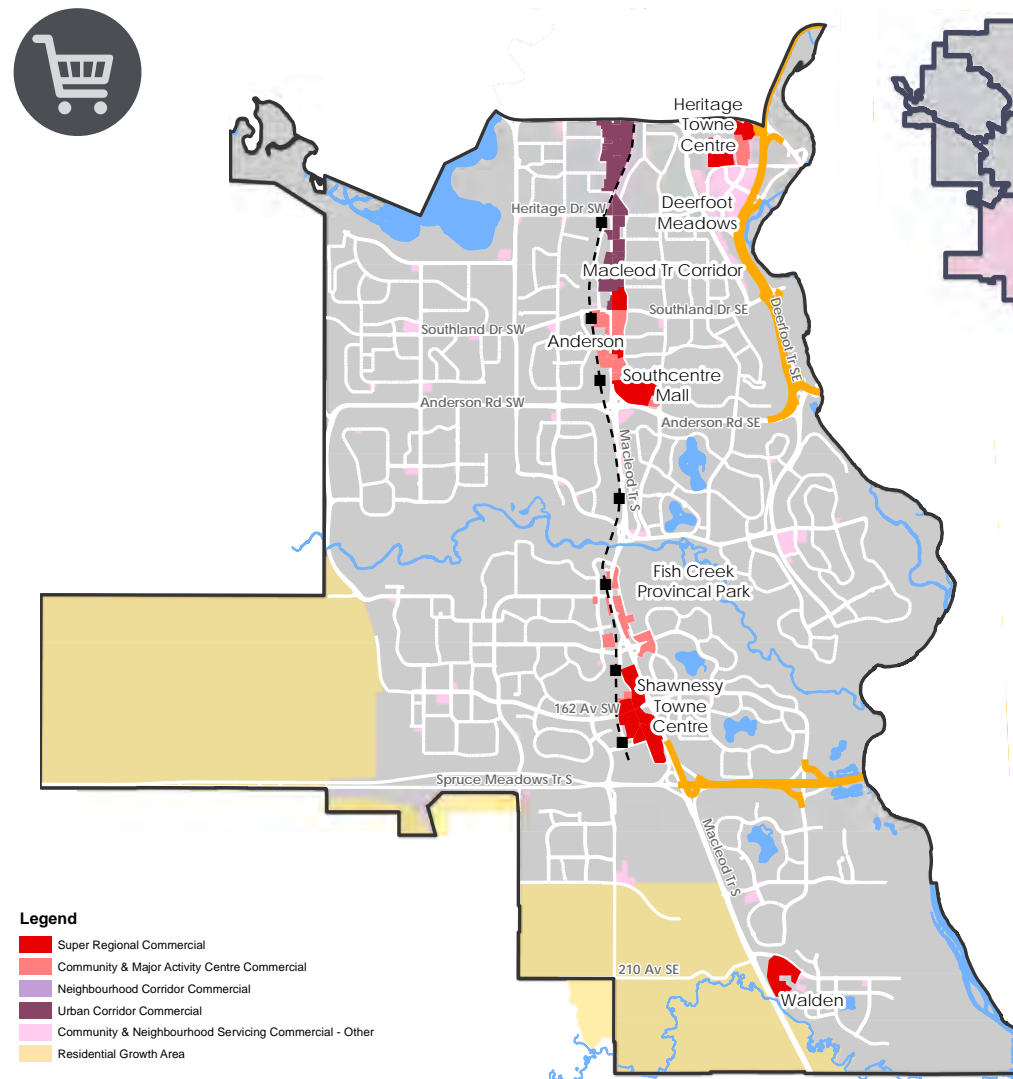
Local and Regional Serving Retail – Smaller Store Size

\*Updated July 2016, City of Calgary

▼ Table 6: East Retail Sector – Details

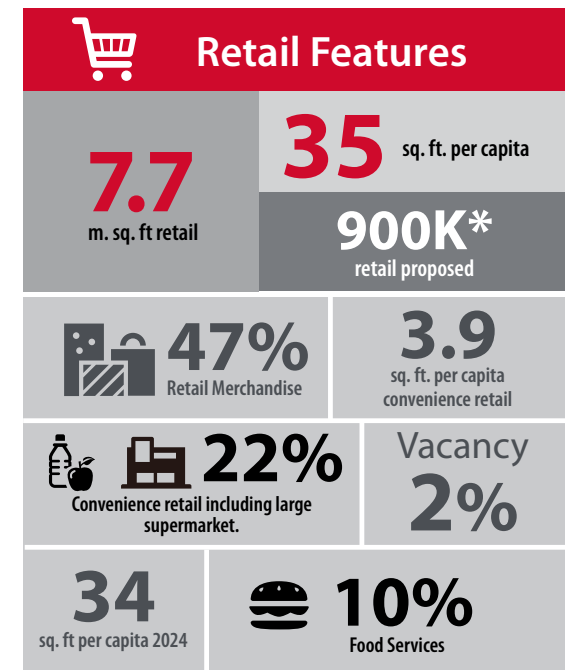
	Retail Square Footage	Percentage Square Footage	Store Count	Average Store Size
<b>GAFO (General Merchandise, Apparel and Accessories, Furniture and Other Sales)</b>				
Furniture and Home Furnishings Stores	9,600	3.5%	5	1,920
Electronics and Appliance Stores	4,800	1.1%	5	960
Clothing and Clothing Accessories Stores	27,600	13.1%	12	2,300
Sporting Goods, Hobby, Book and Music Store	14,400	3.8%	8	1,800
General Merchandise Stores and Dollar Stores	145,150	7.6%	6	24,192
<b>Total GAFO</b>	<b>201,550</b>	<b>29.1%</b>	<b>36</b>	<b>5,599</b>
Home Improvement, Building Material and Garden Equipment	27,000	2.8%	4	6,750
Miscellaneous Stores	68,950	3.8%	23	2,998
<b>Total Retail Merchandise</b>	<b>297,500</b>	<b>35.8%</b>	<b>63</b>	<b>4,722</b>
<b>Food Services</b>				
Food Services and Restaurants	158,350	18.1%	112	1,414
Bar and Night Club	33,000	2.3%	11	3,000
<b>Total Food Services</b>	<b>191,350</b>	<b>20.4%</b>	<b>123</b>	<b>1,556</b>
<b>Convenience Retail</b>				
Food and Beverage Stores	163,550	6.4%	59	2,772
Liquor Stores	27,400	1.5%	16	1,713
Health and Personal Care Stores	40,150	2.9%	13	3,088
<b>Total Convenience Retail</b>	<b>231,100</b>	<b>10.9%</b>	<b>88</b>	<b>2,626</b>
<b>Personal Services</b>				
Hair and Beauty Services	30,300	4.3%	41	739
Personal Household Services	6,050	0.7%	7	864
<b>Total Personal Services</b>	<b>36,350</b>	<b>5.0%</b>	<b>48</b>	<b>757</b>
<b>Financial And Telecom</b>				
Financial and Insurance Services	30,300	2.7%	15	2,020
Postal, Courier, Telecom, and Cable Services	3,900	0.5%	6	650
<b>Total Financial And Telecom</b>	<b>34,200</b>	<b>3.1%</b>	<b>21</b>	<b>1,629</b>
<b>Professional And Other Services</b>				
Business Services	26,500	2.7%	22	1,205
Health Services	46,600	5.2%	31	1,503
Recreation Services	12,600	4.7%	3	4,200
Other Services	64,650	6.6%	36	1,796
<b>Total Professional And Other Services</b>	<b>150,350</b>	<b>19.1%</b>	<b>92</b>	<b>1,634</b>
<b>Total Retail</b>	<b>940,850</b>	<b>94.3%</b>	<b>435</b>	<b>2,163</b>
Vacant	30,250	5.7%	19	1,592
<b>Total</b>	<b>971,100</b>	<b>100%</b>	<b>454</b>	<b>2,139</b>
Automotive	82,750		40	2,069
Gas Stations	7,700		8	963
<b>TOTAL ALL</b>	<b>1,061,550</b>			

▼ Map 9: South Retail Sector



### Key Socio-Economic Facts

- High Population and Moderate Population Growth.
- Older Families with Children and Young Families – both stable and growing neighbourhoods.
- Moderate to High Household Income.
- High Separated/Divorced/Widowed.



Local and Regional (destination) Serving Retail – medium to large Store Size

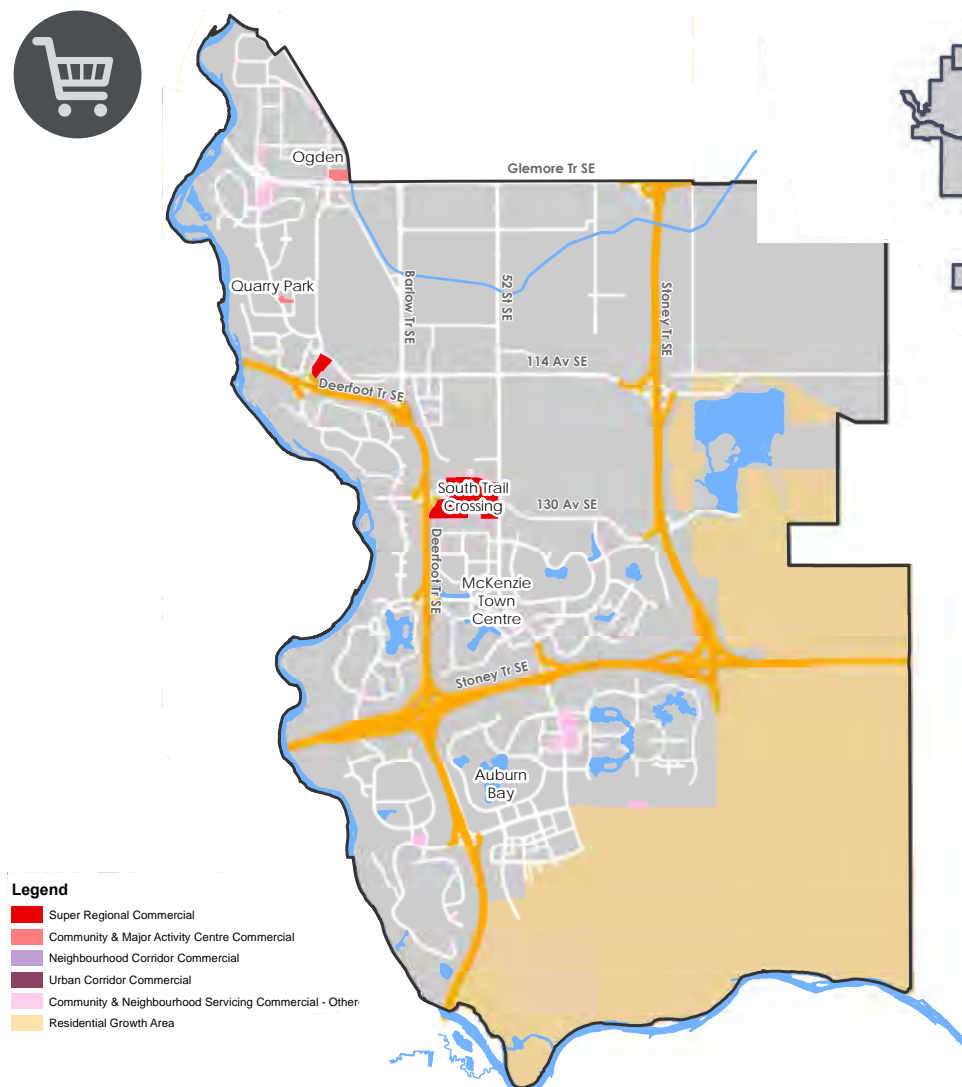
\*Updated July 2016, City of Calgary



▼ Table 7: South Retail Sector – Details

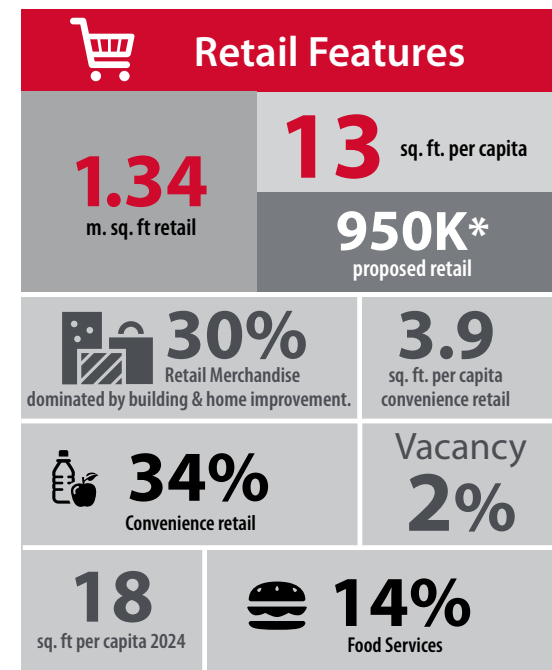
	Retail Square Footage	Percentage Square Footage	Store Count	Average Store Size
<b>GAFO (General Merchandise, Apparel and Accessories, Furniture and Other Sales)</b>				
Furniture and Home Furnishings Stores	659,800	8.6%	47	14,038
Electronics and Appliance Stores	121,750	1.6%	19	6,408
Clothing and Clothing Accessories Stores	584,600	7.6%	150	3,897
Sporting Goods, Hobby, Book and Music Store	407,900	5.3%	52	7,844
General Merchandise Stores and Dollar Stores	1,321,050	17.2%	24	55,044
<b>Total GAFO</b>	<b>3,095,100</b>	<b>40.4%</b>	<b>292</b>	<b>10,600</b>
Home Improvement, Building Material and Garden Equipment	273,300	3.6%	14	19,521
Miscellaneous Stores	192,400	2.5%	70	2,749
<b>Total Retail Merchandise</b>	<b>3,560,800</b>	<b>46.5%</b>	<b>376</b>	<b>9,470</b>
<b>Food Services</b>				
Food Services and Restaurants	665,500	8.7%	326	2,041
Bar and Night Club	95,050	1.2%	18	5,281
<b>Total Food Services</b>	<b>760,550</b>	<b>9.9%</b>	<b>344</b>	<b>2,211</b>
<b>Convenience Retail</b>				
Food and Beverage Stores	1,238,650	16.2%	106	11,685
Liquor Stores	135,050	1.8%	49	2,756
Health and Personal Care Stores	287,100	3.7%	62	4,631
<b>Total Convenience Retail</b>	<b>1,660,800</b>	<b>21.7%</b>	<b>217</b>	<b>7,653</b>
<b>Personal Services</b>				
Hair and Beauty Services	199,200	2.6%	154	1,294
Personal Household Services	64,800	0.8%	58	1,117
<b>Total Personal Services</b>	<b>264,000</b>	<b>3.4%</b>	<b>212</b>	<b>1,245</b>
<b>Financial And Telecom</b>				
Financial and Insurance Services	204,250	2.7%	48	4,255
Postal, Courier, Telecom, and Cable Services	25,450	0.3%	26	979
<b>Total Financial And Telecom</b>	<b>229,700</b>	<b>3.0%</b>	<b>74</b>	<b>3,104</b>
<b>Professional And Other Services</b>				
Business Services	113,700	1.5%	57	1,995
Health Services	314,900	4.1%	141	2,233
Recreation Services	373,500	4.9%	49	7,622
Other Services	206,750	2.7%	113	1,830
<b>Total Professional And Other Services</b>	<b>1,008,850</b>	<b>13.2%</b>	<b>360</b>	<b>2,802</b>
<b>Total Retail</b>	<b>7,484,700</b>	<b>97.7%</b>	<b>1,583</b>	<b>4,728</b>
Vacant	177,600	2.3%	52	3,415
<b>Total</b>	<b>7,662,300</b>	<b>100%</b>	<b>1,635</b>	<b>4,686</b>
Automotive	107,850		26	4,148
Gas Stations	22,350		27	828
<b>TOTAL ALL</b>	<b>7,792,500</b>			

▼ Map 10: Southeast Retail Sector



**Key Socio-Economic Facts**

- Moderate Population Size and High Population Growth.
- Young Families with Young Children.
- High Household Income.
- Some Employment.



Local serving retail suited to young and growing families.

\*Updated July 2016, City of Calgary

▼ Table 8: Southeast Retail Sector – Details

	Retail Square Footage	Percentage Square Footage	Store Count	Average Store Size
<b>GAFO (General Merchandise, Apparel and Accessories, Furniture and Other Sales)</b>				
Furniture and Home Furnishings Stores	37,350	2.8%	2	18,675
Electronics and Appliance Stores	1,000	0.1%	1	1,000
Clothing and Clothing Accessories Stores	4,250	0.3%	3	1,417
Sporting Goods, Hobby, Book and Music Store	42,400	3.2%	5	8,480
General Merchandise Stores and Dollar Stores	113,500	8.4%	4	28,375
<b>Total GAFO</b>	<b>198,500</b>	<b>14.8%</b>	<b>15</b>	<b>13,233</b>
Home Improvement, Building Material and Garden Equipment	182,500	13.6%	3	60,833
Miscellaneous Stores	19,100	1.4%	13	1,469
<b>Total Retail Merchandise</b>	<b>400,100</b>	<b>29.8%</b>	<b>31</b>	<b>12,906</b>
<b>Food Services</b>				
Food Services and Restaurants	180,750	13.5%	101	1,790
Bar and Night Club	11,650	0.9%	3	3,883
<b>Total Food Services</b>	<b>192,400</b>	<b>14.3%</b>	<b>104</b>	<b>1,850</b>
<b>Convenience Retail</b>				
Food and Beverage Stores	342,250	25.5%	27	12,676
Liquor Stores	33,700	2.5%	14	2,407
Health and Personal Care Stores	72,850	5.4%	16	4,553
<b>Total Convenience Retail</b>	<b>448,800</b>	<b>33.4%</b>	<b>57</b>	<b>7,874</b>
<b>Personal Services</b>				
Hair and Beauty Services	37,150	2.8%	37	1,004
Personal Household Services	9,900	0.7%	12	825
<b>Total Personal Services</b>	<b>47,050</b>	<b>3.5%</b>	<b>49</b>	<b>960</b>
<b>Financial And Telecom</b>				
Financial and Insurance Services	64,750	4.8%	17	3,809
Postal, Courier, Telecom, and Cable Services	6,000	0.4%	5	1,200
<b>Total Financial And Telecom</b>	<b>70,750</b>	<b>5.3%</b>	<b>22</b>	<b>3,216</b>
<b>Professional And Other Services</b>				
Business Services	9,500	0.7%	8	1,188
Health Services	59,950	4.5%	39	1,537
Recreation Services	29,400	2.2%	9	3,267
Other Services	58,900	4.4%	28	2,104
<b>Total Professional And Other Services</b>	<b>157,750</b>	<b>11.7%</b>	<b>84</b>	<b>1,878</b>
<b>Total Retail</b>	<b>1,316,850</b>	<b>98.0%</b>	<b>347</b>	<b>3,795</b>
Vacant	26,900	2.0%	11	2,445
<b>Total</b>	<b>1,343,750</b>	<b>100%</b>	<b>358</b>	<b>3,753</b>
Automotive	4,400		1	4,400
Gas Stations	4,300		7	614
<b>TOTAL ALL</b>	<b>1,352,450</b>			

### Appendix B – Retail Trends

*Source: J.C. Williams Group*

#### Retail Trends

Retailing is an ever evolving activity that changes according to consumer trends as well as outside forces like technology. Figure 9 shows the lifecycle of various retail formats. While some retail formats can reinvent themselves so that maturing does not inevitably lead to decline, many retail forms decline and the retailers within those forms go out of business. A good example would be department stores, which have been in decline for many years, attacked by lower price big box formats and specialty stores. While many department stores such as Woodward's and Eaton's have closed their doors, Hudson's Bay has transitioned to become a super specialty store.

#### Immediate Term

These are trends that are current and may or may not continue to become a long term trend.

##### Luxury

The two largest luxury retailers in Canada are Holt Renfrew and Harry Rosen. Their store count has been relatively stable over the past twenty years with some expansions, closures, and the addition of very few new stores. In the past five years, luxury retailers from around the world have started to set up stores in Canada. It started with the brands; e.g., Burberry and Gucci, followed by product specialists; e.g., Tiffany. Two new competitors, Nordstrom and Saks, are about to expand the square footage of luxury retail space significantly. While the addition of these stores to the Canadian landscape will recapture some of the sales that have gone out of the country, the question remains—is there enough demand to support all of these players? This is particularly an issue since Canada does not have a very large “rich” population compared to the U.S.

#### Designer Outlet Malls

There are a number of reasons why designer outlet malls are growing quickly in Canada and will likely to do so for the next five to ten years. First, many customers aspire to luxury brands but simply cannot afford to shop at full price concepts. Second, in response to these aspirational shoppers, many bricks and mortar and online businesses have been set up to serve this customer. These businesses include the full line specialists like Winners, the discount versions of luxury stores like HR2 (Holt Renfrew) and Nordstrom Rack, and online auction and designer discount sites like Beyond the Rack, Gilt Group.

Designer outlet malls are typically smaller in footprint  $\pm 400,000$  sq. ft. and open so they are easier to develop. However, the newest versions have much better design amenities than a typical power centre thus enhancing the designer feel of the retailers. Outlet shoppers travel further to reach the malls but do not shop as often as other mall shoppers. While this has been the only kind of mall development happening in the U.S. since 2008, designer outlet malls still only account for a very small amount of the retail space in the U.S.

In Canada, there have been a number of attempts to develop these kinds of malls. A major stumbling block has been the fact that many of the brands were not interested in locating in Canadian malls so there was not enough critical mass. Ivanhoe Cambridge has developed a hybrid version in Cross Iron Mills that combines power centre and outlet mall characteristics in response to the challenge of getting tenants. That challenge has changed with the entry of specialty developers Tanger and Simon Premium Outlets. These developers will bring with them their expertise and the brands that typically locate in their American developments.

Despite this being a strong short term trend, it is unlikely to have a significant long term impact on Calgary retail.



## Longer Term Trends

### Trading up, Trading Down

Like residents in many developed countries, the after tax income of Canadians has been static for all but the highest quintile over the past five years. This has driven customers to make trade-offs on how and where they shop; e.g., willingness to spend \$5 for a latte but to buy socks at Walmart. This has driven increased demand for discounters such as Dollarama as well as the larger general merchandisers like Walmart and Costco. Conversely, Starbucks and luxury brands like Burberry have also expanded, often serving the same customer.

### Ethnic Retailing

In the past, Calgary was much less ethnically diverse than other Canadian cities like Vancouver and Toronto. However, Calgary has become a magnet for many new immigrants because of the growth of job opportunities. While immigrants continue to be attracted to areas of the city like Chinatown and International Village where independent stores have located, the growth of immigrant communities has attracted the development of new retailers like T & T (owned now by Loblaws) as well as more established retailers developing offerings focused on these communities (e.g., FreshCo. owned by Sobeys). These kinds of retailers will expand as the immigrant communities that support them expand.

### Blurring of Categories

This trend has been happening over the past 10 years as retailers look for growth in categories that have not traditionally been found in their stores. These products are added by retailers for a number of reasons such as:

- Increased customer traffic – drug stores and discount stores like Walmart have increased their food sections often to help increase regular visits to the store.
- To satisfy customer demand – sporting goods stores now offer many products that are meant for street wear and have become important apparel suppliers.
- To provide convenience for their customers – this is another reason why drug stores have added products, like milk, so that busy parents, for example, can pick up traditional drug store products for their children as well as grab frequently replaced food items.

A challenge for municipalities who are trying to ensure that retail development is supported by market demand is that measuring the actual floor space of many products such as food is much more difficult than in the past when most food was sold in food stores.

The other outcome is that stores that have expanded the categories that they carry have also tended to increase the size of their stores. Traditional Walmart general merchandise stores are around 100,000 square feet. Their new SuperCentres can be over 200,000 square feet. As Walmart expands the SuperCentres concept in Canada they have vacated their smaller stores and moved into the larger ones leaving behind spaces that are hard to fill.

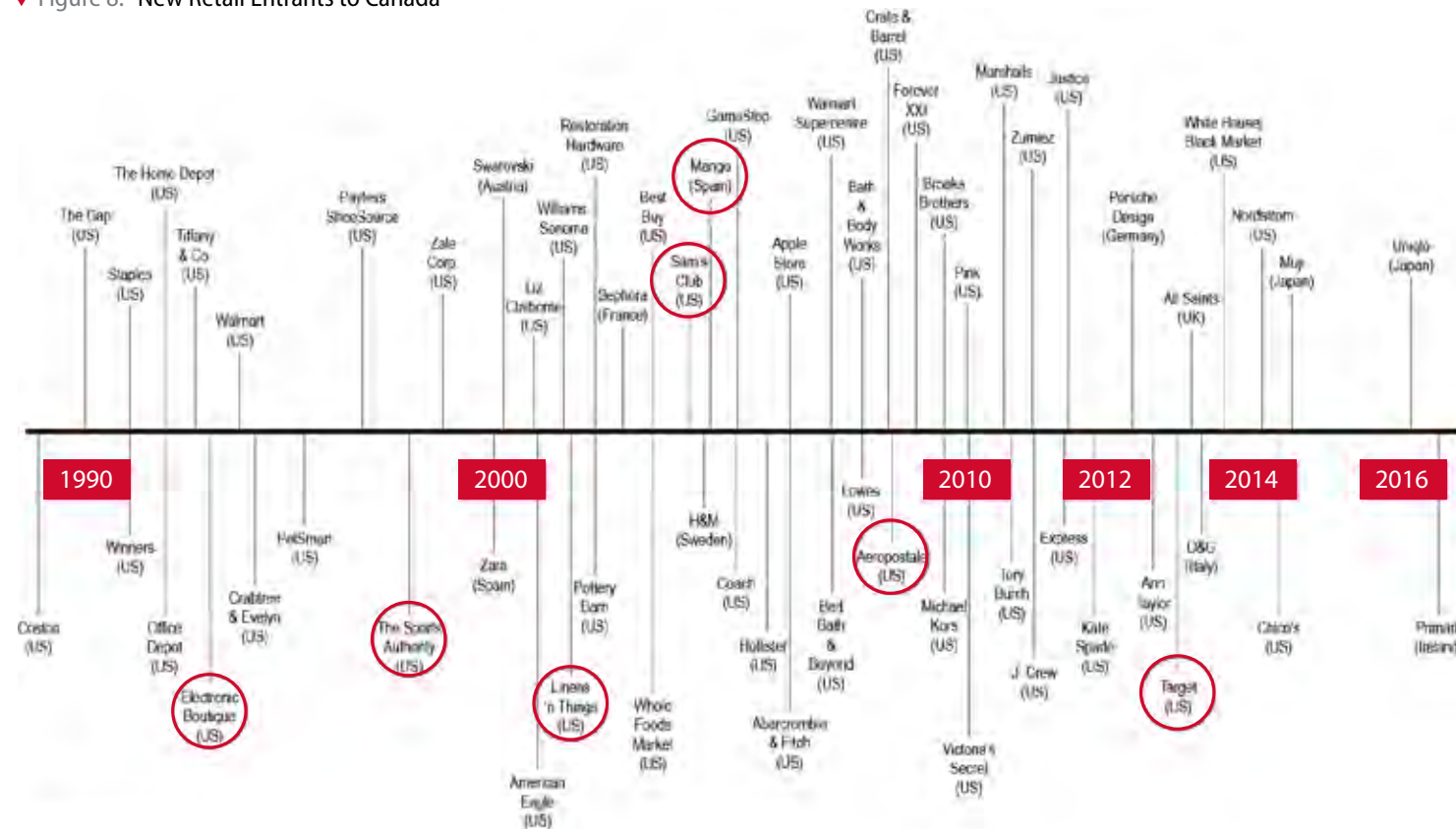
Drug stores have also increased significantly in size as chains like Shoppers Drug Mart increase the size of their cosmetics offering and add food to their product mix. Now that Loblaws owns Shoppers Drug Mart, this trend will continue to expand.

## Globalization of Retailers

The global trend for retailers to look for sales growth beyond the borders of their native country has had a significant impact on the Canadian retail marketplace as retailers from other countries enter Canada. While this is not a new trend as illustrated below, the recession of 2009 in the

developed world and Canada's early rebound from that recession drove many retailers from both the U.S. and Europe to develop growth plans for Canada.

▼ Figure 8: New Retail Entrants to Canada



Source: J.C. Williams Group

The impact on retail real estate has been to:

- Create demand for regional and super regional malls that many could not accommodate, as very little space has been created in this category for many years. The result has been virtually 100% occupancy in the best malls and upward pressure on rents. Weaker tenants, many Canadian, are being pushed out of better malls in favour of new entrants.
- Encourage more power centre development, which has slowed in many Canadian cities in recent years. In addition, other U.S. retailers are taking note of Target's troubles and have reduced or shelved their Canadian entries.

### Urban Living

The extensive development of residential units in the downtowns of larger Canadian cities and other urban nodes has led to demand for more convenience-oriented retailers and services in dense urban areas. This trend has happened in larger U.S. cities as well, partially driven by younger workers who crave an urban lifestyle as well as the challenges of commuting in these cities. Calgary has also been experiencing this strong urban growth despite the fact that the city is not perceived as having the same level of urbanity as other comparable cities.

The demands of urban residents are different from those of downtown workers, so this has driven more demand for grocery and other convenience goods which tend to be bought close to home. This demand has driven many retailers to develop smaller scale formats that will fit into urban real estate as well as choosing second level locations in order to reduce their rents in high cost urban areas. Downtown Calgary's retail base has been focused around serving the needs of the very large employee base located there, leaving residents relatively underserved. This is likely to change as retail developers see the opportunities there, just as is happening throughout North America.

### Waves of Retail Development

The Retail Development Timeline illustrates the various waves of retail development in Canada. In general, these real estate trends have been the outcome of new forms of retailing. For example, shopping centre development happened as department stores and specialty retailers tried to reach the new customers in the suburbs. Power centres were developed to accommodate large scale, low cost retailers who could not work in malls.

The diagram also shows the move from downtown to suburban and then to a more "new urban" form of development. While the development trends are evolving, power centres continue to be built, albeit at a slower pace than in the 1990s and 2000s.

### Omni-channel Retailing

The most revolutionary new development in retail in the past ten years has been the development of e-commerce. While Canadian retailers have been slow to develop and expand this channel, retailers in both the U.S. and U.K. have been the most aggressive in growing this part of their businesses. The current estimate for Canadian e-commerce retail sales in 2014 is \$25 billion<sup>1</sup>. U.S. e-commerce sales are estimated to be \$273 billion.

E-commerce sales have grown at a much faster pace than store-oriented retail sales with companies like Amazon becoming a 60+ billion dollar company. Retail sales in stores that have been impacted most are books, music, and electronics. While electronics retailers have been able to fight back and develop an omni-channel response, book and music retailers have suffered with both HMV and Indigo closing stores or re-orienting their offering while developing their own online stores.

It is clear that a significant amount of Canadian e-commerce retail sales are going across the border as retailers in other countries, most particularly the

<sup>1</sup> eMarketer

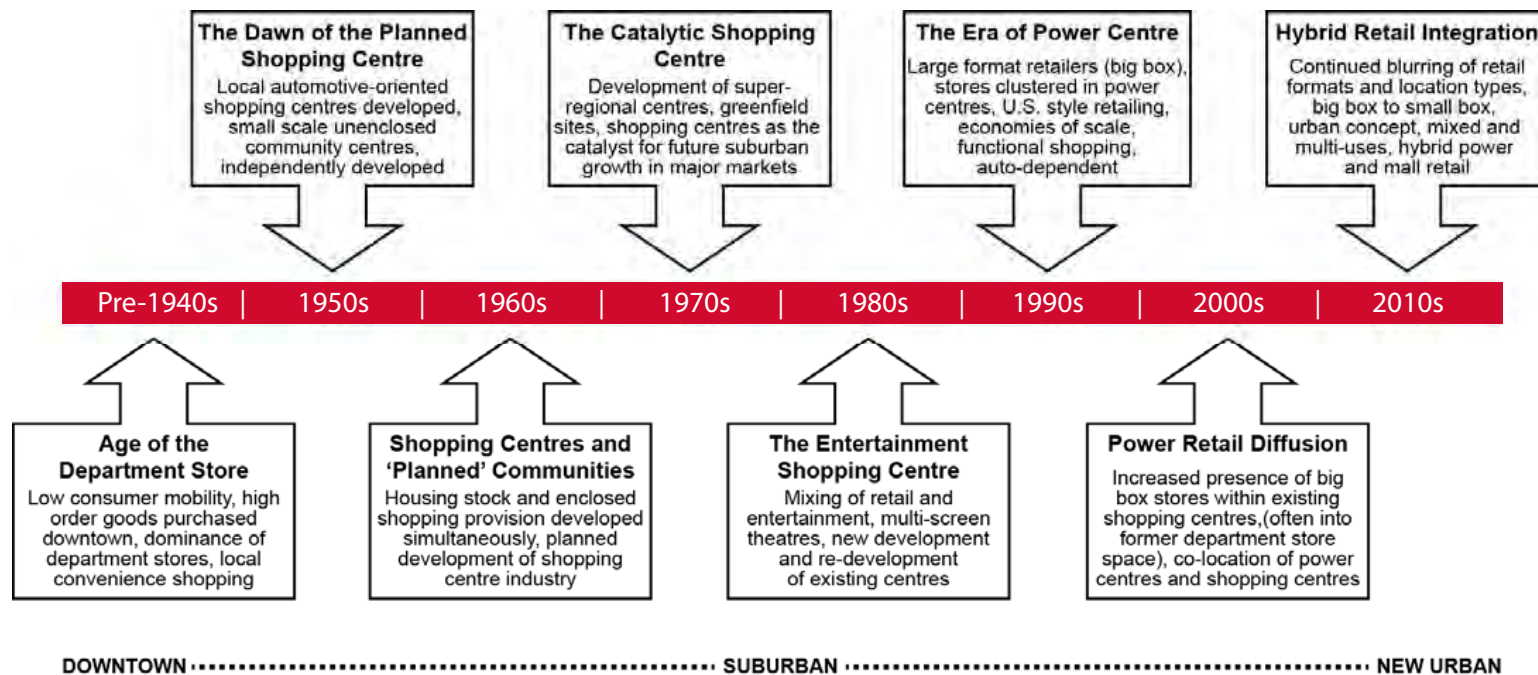
U.S., make it much easier to make purchases. A recent study of Canadian online shoppers indicated that two-thirds of shoppers had made a purchase internationally, with 43% of their purchases coming from the U.S.<sup>2</sup>

Omni-channel retailing is when a retailer employs the coordinated use of all their channels (e.g., store, web, mobile, social) to support customer-centric shopping and sales in a channel agnostic manner. This is seen as

<sup>2</sup> Canada Post, J.C. Williams Group, "Online Shoppers and Buyers." Feb. 2013

the future for store-based retail that must compete with e-commerce websites. According to Forrester Research, 45% of all U.S. retail sales in 2013 were either e-commerce or web-influenced. In addition, retailers that have been exclusively web-based are now opening bricks and mortar stores to create either showrooms or store faces for their online businesses. Even Amazon is opening stores in New York and San Francisco.

▼ Figure 9: Retail Development Timeline



Source: CSCA



At this point, it is unclear the effect on retailers in general. To date, retailers that have digital competition (downloads); e.g., books stores, have closed stores or reduced the amount of space allocated to books. Many have gone out of business. Other retailers such as electronic stores have started to reduce the amount of space in their bricks and mortar stores as they use their websites to stock additional inventory. While this has had some effect on power centres, particularly in the U.S., it has not been a major issue yet in Canada.

There are a number of new space uses that have been spawned by the consumer's need to have access to the retailer in any format. Some of these trends include:

- Amazon lockers – where Amazon leaves purchases in centralized secure lockers for customers who will not be available for delivery.
- Mobile shopping using QR codes – both Well.ca and Walmart.ca have experimented with virtual shelves set up in high traffic areas where consumers can do their shopping with their smart phones and have their products delivered the next day.
- Online retailers setting up stores or showrooms – this allows these retailers to feature their brands in a real environment. E-retailers like Clearly Contacts and Bonobos have set up stores to expand their brands.

These trends have had little impact on retail space in Calgary to date but it is early for this kind of shopping.

### **Reinvestment in Regional Shopping Centres**

While there has not been a significant amount of new regional shopping centre space built in Calgary, major malls have made a substantial investment in upgrading their facilities. Often this upgrade has come with re-tenanting where less productive retailers are moved or dropped to make way for new entrants. Examples of these investments in Calgary include significant redevelopment at both The Core downtown and Chinook Shopping Centre as well as most other shopping centres that must remain competitive to be viable and attractive to tenants.

These investments show that many regional shopping centres will be adding space in the next few years, often on second and third levels. These expansions often include additions of office space and parking structures as well.

### **Customized Formats**

While some retailers are developing very large formats like supercentres, other retailers are down-scaling their formats so that they can fit into dense urban areas. Virtually all Canadian grocery retailers have an urban format that is considerably smaller and, in most cases, more expensive than their suburban versions. These smaller formats feature smaller serving sizes and larger ranges of pre-prepared foods.

Other countries have led the way in urban formats with stores like Tesco in the U.K. and Walmart in the U.S. experimenting with smaller scale stores. Walmart has developed a Market Pantry and an Express concept testing different sizes. The challenge for retailers that work on low margins and higher volume is to make sure that these stores can deliver their brand and be profitable.

While the small scale formats in Canada, including a 6,500 square foot Canadian Tire Express, are mostly in downtowns, they can also fit well into transit-oriented development where they serve a convenience function.

## Appendix C – Policy and Planning Review

Source: J.C. Williams and IBI Groups, The City of Calgary

### City Planning and Policy Conditions

A range of policies, finance mechanisms and zoning regulations influence the development and redevelopment of retail space in Calgary. The Study evaluates sixteen indicators to assess the ease with which retail development and redevelopment occurs. This work required significant coordination of data sources from various City departments. Some key findings from this review include the following:

### Commercial Development Activity

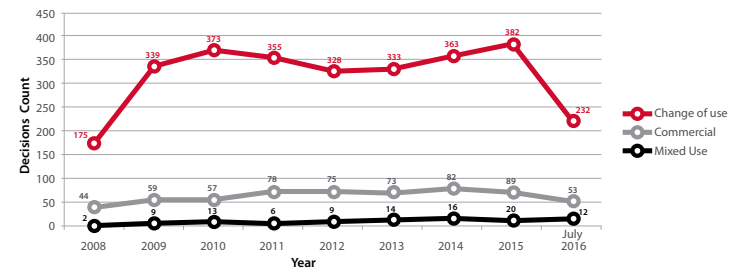
#### Number and Type of Applications

The number of permits processed annually is an indicator of the demand for commercial development and redevelopment. Based on data provided by the City, the study reviews development permit application trends. As shown in figure 10: Development Permit Commercial Decisions 2008-2016, there was a significant drop in applications in 2008 due to a slower economy. The number of applications began to rebound in 2011 (+44%) and has remained steady over the past five year reporting period averaging approximately 83 new build commercial and mixed-use applications annually city wide. While change of use applications (commercial tenancy change with no change to floor area) have remained fairly consistent from 2009 to 2016 averaging about 348 applications annually. When considered together with the application wait times for these specific types of applications, it is evident that The City has maintained and even improved its processing efficiency, an effort that supports all types of retail activities.

### Duration of the Approval Process

The study concludes that commercial applications are a priority for The City. In Calgary, the duration of the approval process has remained relatively stable despite an increase in the number of development applications, which suggests that development permit approval is becoming more and more efficient.

▼ Figure 10: Development Permit Commercial Decisions: 2008-2016 YTD



Source: The City of Calgary

▼ Map 11: Calgary Development Permit Activity

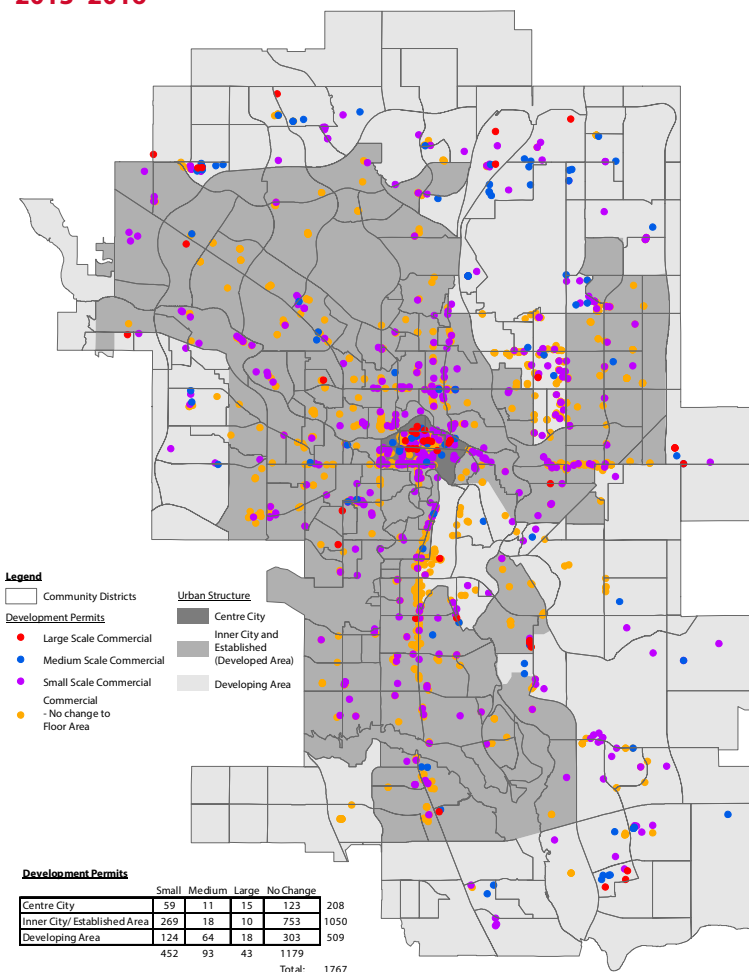
### Location and Type of Commercial Development

As part of the study, general geographic location of the 1767 applications for commercial and mixed-use projects between January 2013 and July 2016 were mapped. As shown in Map 11: Calgary Development Permit Activity 2013–2016, during this time 208 development permits were requested for commercial, mixed use and outdoor cafes in the Centre City and 1050 development permits in surrounding Inner City and Established Area communities, also referred to as the Developed Area in the Municipal Development Plan. During that same period, 509 development permits for commercial, mixed use and outdoor cafes in “outer” or Developing Areas were requested.

A breakdown of the commercial permits based on four size categories: change of uses with zero floor area change, small scale (up to 1900 square metres), medium scale (1901–9300 square metres) and large scale (9300 square metres and larger) is provided. Findings indicate that there is considerable interest in centrally located development, which, by nature, is smaller in scale than in outer suburban locations. This interest in initiating central city retail and commercial activity suggests that there are already a number of incentives (from both the City and market) and market value to locate centrally.

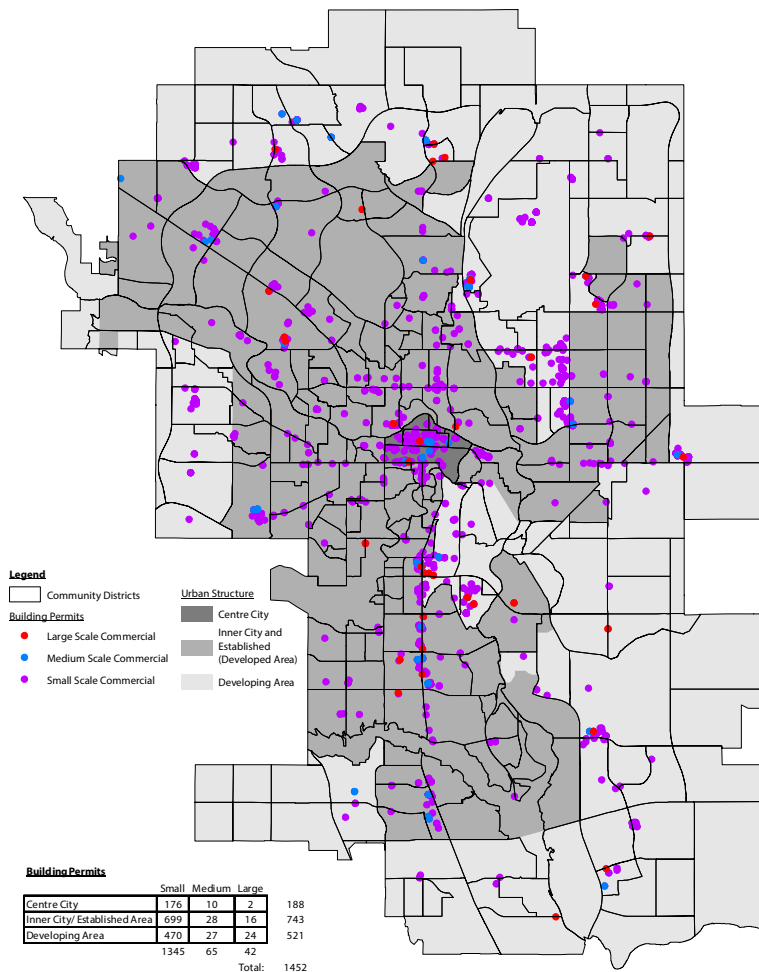
Building Permit data was also analysed. As shown in Map 12: Calgary Building Permit Activity 2013–2016, large concentrations of development activity and new commercial businesses are concentrated within the Centre City, Inner City and Established Community areas and within or in close proximity to centres or corridors and the Primary Transit Network.

2013–2016



▼ Map 12: Calgary Building Permit Activity

2013–2016



## Independent Business Alliances and Business Revitalization Zones (BRZ).

Calgary is home to a range of independent business alliances, some representing a diversity of businesses, such as the Calgary Business Professionals Group, to more specific business types, such as the Canadian Association of Petroleum Producers. These organizations play an important role in advocating on behalf of Calgary's many businesses, creating different retail and commercial incentives depending on the scope and focus of their advocacy.

In total, Calgary's 10 Business Revitalization Zones represent 5,240 businesses, or 20% of all Calgary businesses, contribute \$59 Million in annual business taxes and account for more than \$660 Million in assessed value. BRZs play a valuable role in not only supporting local retail, but in establishing a strong connection between community building and economic growth. BRZs align with areas prioritized for development by The City which is a strong incentive for local retailers to grow within, or move to, a BRZ (or to support the generation of new BRZs in priority areas that currently don't have one).

## Appendix D – Good Practices and Support Tools

The study incorporates research on Canadian best practices and innovative approaches to managing commercial districts. Many of the tools and resources identified that are needed for Calgary to meet strategy goals for retail development and redevelopment are already in place.

A Community Revitalization Levy (CRL) in Calgary. The first city in Canada to enact a mechanism like the US Tax Increment Financing (TIF), the city spurred East Village development that has garnered more than \$1.5 billion in planned investment in 5 years. This helped the area attract its first new developer interest in over a decade.

Planner at Your Service in Winnipeg. The tool incentivizes businesses and developers to align their aims with the strategic priorities outlined in Winnipeg's Complete Communities Checklist. Projects that achieve this are given a "concierge" who guides them through the entire process, including interdepartmental committees.

### Public support tools – how to use them

The study details ten public support tools that could be used by The City of Calgary to help incentivize the kind of development outlined in the Calgary Municipal Development Plan. Table 9 lists the tools and describes when these tools will be most effective to use.

The City of Calgary can employ a series of public support tools to incentivize retail and commercial activities. The chart lists the tools, as well as their sources, beneficiaries and objectives.

### Public support tools – when to use them

Different tools are most effective under different conditions. The table below indicates the economic conditions in which the public support tools should be used.

Strong economic conditions are suited for private support of public initiatives. "Carrots" are less useful, but private resources can fund shared benefits.

A combination of rewards and disincentives can be employed in medium economic conditions. Coordination of efforts can foster growth in these conditions.

During weak economic conditions, rewards and incentives tend to be necessary to achieve policy results. "Carrots" are best-suited for these conditions.

## Public Outreach

Recognizing the importance of public outreach as part of a comprehensive and effective strategy, a series of interviews were conducted with industry and community stakeholder and business interest groups early on in the study. Further, targeted engagement, as detailed below, tied to local area plan work and initiatives is recommended:

- Outreach is key to successful retail area improvement. It should follow the City's Engage! policy, identify stakeholders and use the right tools, tailored to specific groups.
- Stakeholders are typically context specific. They can centrally include local and chain retailers, new entrepreneurs, property owners, City units and retail-supportive organizations.
- Physical, one-to-one activities with two-way communication is best for reaching primary retail stakeholders. Open houses, workshops and roundtables are useful to reach stakeholders and can be supported with information through traditional and new media.
- Identify, inform, understand, explore, propose and act. A typical process involves these six stages of engagement.



▼ Table 9: Support Tools–Beneficiaries and Providers

Tool	Source					Beneficiary					Objective							
	Municipality	Developer	Commercial Property Owner	Local Businesses	Chain Businesses	Local Businesses	Chain Businesses	New Entrepreneurs	Developers	Commercial Property Owner	Public	Municipality	Revitalize existing local retail	Attract new development	Foster new business	Neighbourhood Attraction	Retain Existing Businesses	Reduce Barriers to Development
Direct Public Funding																		
Tax Abatements or Reductions	●					●	●			●			●				●	●
Reduced or Waived Fees	●					●		●	●	●			●	●	●			
Lease of Public Property	●							●	●		●		●	●	●			
Land Acquisition and Preparation	●								●				●	●	●			●
Catalyst Project Grants	●	●				●		●		●	●		●			●		
Public Utility Rate Break	●					●	●	●		●			●	●				
Private Funding Through Use of Public Authority																		
Tax Increment Financing			●			●	●	●	●	●	●	●	●	●	●	●	●	●
District Branding	●	●	●	●	●	●				●		●	●	●	●	●	●	●
Public Improvement Fees		●			●			●		●	●	●		●	●	●		
Small Business Programs/Business Incubator	●		●	●	●	●		●			●	●	●		●		●	
Exercise of Public Authority																		
Expedited Permitting	●					●		●	●	●			●	●			●	●
Business Revitalization Zones	●		●	●		●				●	●		●	●	●	●	●	●
Small Scale Strategic Infrastructure Investment	●	●	●	●	●	●	●			●	●	●	●		●		●	
Incentive-based Zoning	●								●	●			●					●
Planner as Concierge	●					●							●	●				●
Technical Assistance	●					●	●	●		●	●		●	●				●
Pop-up Shops in Empty Retail Space			●	●		●		●		●	●	●	●		●	●		
Preferential Purchasing	●					●					●				●		●	
Parking Incentives	●					●	●	●	●	●			●	●	●		●	●
Pedestrian and Bicycle Infrastructure Investment	●	●	●			●		●		●	●	●	●		●	●	●	●

Source: IBI Group

▼ Table 10: Support Tools – Type of Market

	Direct Public Funding						Private Funding Through Use of Public Authority						Exercise of Public Authority						
	Tax Abatements or Reductions	Reduced or Waived Fees	Lease of Public Property	Land Acquisition and Preparation	Catalyst Project Grants	Public Utility Rate Break	Tax Increment Financing	District Branding	Public Improvement Fees	Small Business Programs/Business Incubator	Expedited Permitting	Business Revitalization Zones	Small Scale Strategic Infrastructure Investment	Incentive-based Zoning	Planner as Conderge	Technical Assistance	Pop-up Shops in Empty Retail Space	Parking Incentives	Pedestrian and Bicycle Infrastructure Investment
Strong							●	●	●	●	●	●	●					●	●
					●		●	●	●	●	●	●	●					●	●
Medium		●	●	●	●		●	●	●	●	●	●	●	●	●			●	●
	●	●	●	●	●	●	●	●		●	●	●	●	●	●	●	●	●	●
Weak	●	●	●	●	●	●	●	●		●	●	●	●	●	●	●	●	●	●
Real Estate Market																			

Source: IBI Group

The “source” provides funding to utilize a specific tool. Different sources have the ability to support different tools.

The “beneficiary” is the group expected to benefit from the utilization of the tool. Various groups may benefit from the utilization of the same tool.

The “objective” is what utilization of the tool is expected to achieve. Multiple objectives can be achieved through the use of one tool.

## Appendix E – Universal Principles

Source: J.C. Williams Group

Before retail will thrive, the area must work for day-time activities and night-time activities, including residential and cultural activities. The most basic characteristics include:

### Universal Characteristics

#### Safety

Retail health depends on the comfort level of customers who will come to the area. The longer a customer spends in an area, the more money they are likely to spend. Both the reality and the perception of safety issues are critical to this comfort level. Illegal activities such as drug dealing or even less offensive activities like graffiti can give the area a bad reputation and discourage customers from coming. The negative psychological effects can be long lasting even when crime in an area is reduced.

#### Cleanliness

The overall cleanliness of an area tends to be an indicator of how much people in the area care about their places. In many customers' minds, lack of cleanliness can indicate lack of safety.

#### Retail Sales Growth

Retailers and developers/investors are attracted to areas that are growing. Retail sales growth attracts increased investment from both competitive and complementary retailers.

#### Favourable Socio-economic Characteristics

Retailers and developers/investors want to see positive changes in a local trade area that demonstrate the area is increasing in size, or that household incomes are growing, or that there is some combination of positive socio-economic attributes that they can capitalize upon.

### Main Street Area Characteristics

The following characteristics relate to the overall main street area. While many of these factors can have quantifiable measurements attached to them, the combination of these factors creates an overall sense of retail viability and vitality.

#### Area Retail Management

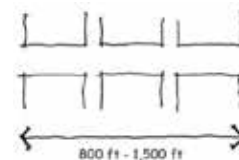


A private sector-led organization or property management team dedicated to supporting property owners, retailers and office tenants can bring about positive change through the introduction of safety and security measures,

beautification, marketing and events, and, at times, retail recruitment.

Research has indicated that retail leadership is one of the key independent variables contributing to the overall health of a main street.

#### Length of the Main Street Area

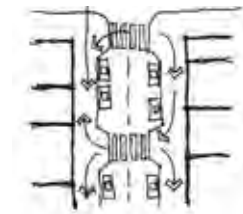


Retail commercial streets should not be too long or too short. Many of Calgary's Main Streets could be divided into more pedestrian-oriented retail commercial blocks/areas. For example, 17 Ave SW/SE currently comprises at least five sub-areas. A general rule of thumb is that an

800 metre doubleloaded retail street can accommodate a good retail mix/composition. However, beyond 1,500 metres it becomes difficult for many consumers to walk comfortably the length of the entire district. If the shopping street is too short, then there may not be enough critical mass of retail to support significant shopping. Consideration should be given, as well, to the creation of nodes at intersections to encourage

retail offerings “just around the corner” – hideaway “gems” that lead logically into the community and begin to promote retail depth to the retail corridor. In addition, the blocks should be relatively short in length. This has numerous benefits including more corner locations and higher visibility and accessibility. It allows for greater flow of target markets into an area through increased vehicular and walking/biking movement. In addition, the consumer is being constantly encouraged to walk further as the blocks are short and therefore more interesting.

## Double Loaded Streets/Width of the Roadway



The width of the roadway, in combination with whether there is double loaded retail, contributes to consumers’ sense of intimacy and comfort, and creates a positive perception of the street. Being able to easily and safely cross the street encourages consumers to do so and to expand their shopping experience.

Cross-shopping ability is important for local neighbourhood streets and very important for comparison shopping streets. The Complete Streets movement is part of the assessment of the overall health and vitality of main streets. The presence of retail on both sides of the street creates increased synergy opportunities for cross shopping. Narrower street widths, known as “compression,” are more likely to produce more intimate retail conditions.

## Parking Availability and Management



**On-street Parking:** Calgary retail businesses are very dependent on vehicular travel as noted in the Phase I surveys. The presence of on street parking for easy access is an important locational consideration. Merchants generally prefer curb parking – known as “teaser” parking – directly in front of their store as a lure to shoppers hoping to “get the perfect parking spot.”



**Private Parking:** One of the positive attributes of new urbanism and its contribution to the regeneration of our cities is the observations that storefronts should be as close as possible to the sidewalk, with off-street parking either behind, over or under the retail facility. The prior suburban model of parking between the sidewalk and the storefront, for the convenience of the auto, should be discouraged.

**Public Parking:** Similar to on-street parking, the availability of nearby public parking can be a boost to retail areas. Easily accessible or designated parking is an important consideration for many retailers who consider a main street location. Some retailers have indicated they would lower their parking requirements in some urban instances if there was ample public parking nearby. However, destination retailers would want to provide their own parking in many instances.

## Public Realm: Streetscape, Signage, and Urban Plazas



**Streetscape:** Good streetscape design is critically important to the success of a retail district, as it creates an environment in which the pedestrian (shopper) feels comfortable and safe.

- A wide, high quality, walking surface with attractive treatments is important for pedestrians, both to prevent crowding and to improve the visibility and accessibility of shops.
- Seating should be placed along the street to provide places to rest and linger.
- Street trees provide interest and shade, for while sun exposure is important, too much sun can create an uncomfortable environment dissuading shoppers from continuing.
- Flowers and shrubs can be used to soften hard surfaces and decorative street lighting and banners can help create a positive, festive environment.



**Signage:** Retail precincts generally benefit from coordinated streetscape signage/identification programs that serve to “brand” an area as distinctive. Entry signs, branded logos on banners, wayfinding systems, and street furniture

tend to reinforce the notion of a retail/shopping precinct of quality and interest. This is part of the specialized retail focus for the area in terms of their vision and brand.

- Individual storefronts should have sufficient signage to inform shoppers of their name and services, but should not “over sign” to the detriment of the streetscape. The use of blade signs, as done with grace and purpose in cities such as Santa Fe, NM, should be considered to benefit navigation for pedestrians up-and-down a street. What should be discouraged is the use of sandwich boards and mobile signage devices.



**Urban Plazas:** Small urban plazas encourage people to linger in a shopping district. These smaller spaces present an area of respite with a human scale, making them feel comfortable while increasing the opportunity for socializing. They also frame the retail spaces surrounding them better increasing visibility and accessibility.

- These areas can be used for events.
- Smaller plazas and parks may also appear busier and therefore feel safer than larger, emptier spaces, thus encouraging their use.



**Sunlight:** People naturally seek out the sun. They prefer to walk in it, relax in it and dine in it. Sunlight has a positive effect on people’s attitudes, which encourages them to remain active, to continue to explore an area, and potentially to shop more.

## Vehicles Per Household



Rather than assess the number of vehicles on the street or nearby street, a metric that assesses the number of vehicles per household in the local 10 minute walk time area is important. For local retail, the lower the ratio the better. If vehicular traffic is too high compared to the local density, then local neighbourhood retail will not want to locate there. The density of the local area has to be in proportion to the traffic volumes to create a more intimate walking street that local households will want to walk to, bike to, take public transit to, and drive to for shopping and socializing.

## Main Street Area Composition

### Specialized Focus



The main differentiation for focus is whether the corridor has a local neighbourhood shopping focus or is a destination for more comparison goods. Within these categories can be specialization such as destination/ethnicity or destination/food services and entertainment vs local/food services. The more highly focused the vision is for a retail main street the better the street is serving customers as well as the better it is at competing with nearby large format retail developments.

### Retail Mix

There are three different retail mix categories that reflect how the customer shops.



**Retail Merchandise:** For those main streets that have a stronger comparison or destination component to them, the higher the retail merchandise proportion the better. Twenty per cent is acceptable for local neighbourhood retail but 30% and higher is preferred for comparison and destination districts.



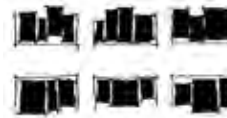
**Food Services:** Similar to retail merchandise, a higher proportion, greater than 20%, reinforces the specialized focus nature of the street for food service and entertainment. This is often a retail mix strength for urban main streets. Some districts may have 50% of the retail mix as food service, entertainment areas and restaurant rows. The food service retail mix is a vital component to any main street area that is trying to develop more nighttime activities such as theatre, arts, cinema, etc. environments.



**Convenience Retail:** For local serving corridors, a higher proportion of convenience retail (grocery, supermarkets, specialized food, pharmacies/drug stores, optical, etc.) is ideal.

Generally, retail merchandise requires more of a selection process and therefore a longer shopping visit while convenience retail is shopped more frequently but shopping visits are shorter. Food services are either eat-in or take-out businesses that prepare food for immediate consumption.

### Total Amount of Retail Space



The amount of retail on the Main Street relates to a combination of factors mentioned including the length of the area, the critical mass of retailers, and the specialization, which all relate to the ability for a main street to attract consumers. Some smaller main streets may have one or two destination stores but there is no critical mass. While the length of the main street is related to the total amount of retail space, some main streets can attain higher critical mass and total retail space through vertical retailing.

In addition, lower vacancy rates demonstrate the strength of a corridor and desirability for retailers to locate there.

### Quality of Retail

The quality of retail is evaluated on the basis of the professionalism of the operations and merchandise rather than the price of the merchandise sold. Retailers with low prices can be considered quality operations. It is their ability to be competitive within their segment and to draw customers that leads to better quality ratings.



## Additional Anchors



Other anchors on the main street or nearby, including employment, schools, libraries, theatres, arts and cultural facilities, hotels, and sporting/recreation venues, which draw potential consumers, are very important for local neighbourhood retail. These day-time and night-time activity generators help to create additional sales volumes during non-peak times. These may include family-oriented activities with a retail spin off that contribute to the creation of complete communities. Activities associated with arts and cultural venues can help support destination restaurants.

## Walkability and Transit Access

Walkability and transit usage potential are affected by a whole range of factors including many of the ones previously mentioned. The Walk Score and Transit Score programs are often used to assess a main street's conditions based on proximity factors. It does not assess the conditions of the sidewalks, grade of the sidewalk, whether they are short blocks or double loaded, nor the overall cleanliness and safety. The walkability and transit access scores are related to the retail mix and other anchor composition of the main street.

According to the site's creators, The Walk Score algorithm awards points based on the distance to the closest amenity in each category. If the closest amenity in a category is within .4 km, it is assigned the maximum number of points. The number of points declines as the distance approaches 1.6 km—no points are awarded for amenities further than 1.6 km. Each category is weighted equally and the points are summed and normalized to yield a score from 0–100. The number of nearby amenities is the leading predictor of whether people walk. Relevant amenities include “businesses, parks, theatres, schools, and other common destinations”.

Transit Score is developed using a similar methodology.

Walk and Transit Score properties are more important for local neighbourhood retail than some destination retail.

## Retail Rents



Rents are an indicator of the desirability of a main street and the ability for retailers to succeed. Generally if retailers can pay higher rents in an area their sales are higher. This is very important for comparison shopping and destination shopping areas. Rents are relatively stable throughout most of Calgary's main streets with the exception of high demand areas such as 17 Ave SW and the major regional malls. While higher rents may displace some retailers because of their inability to pay, they also have the option of downsizing their space to become more efficient. In some very high traffic areas, retailers will also consider second level space or a mix of main floor and second level (which is always much lower) in order to ensure that rent is affordable overall. Rents are also indicative of the redevelopment potential on a main street. If rents are too low, the redevelopment will not want to include retail on the ground level as it will not contribute to a positive return on investment.

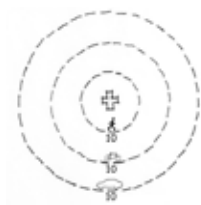
## Location of Competitive and Supportive Retailers

The existence of retailers that are both competitive and supportive in an area helps to build the strength of an area. For example, an area that has a range of clothing stores is likely to attract more shoppers because they know that if one store does not have what they want, there will be more choices for them.

Often coffee shops and cafes will be supportive to other kinds of retail because shoppers can extend the shopping experience beyond simply shopping, thus making the shopping trip more interesting and making a longer trip to the area worthwhile. This increases the trade area for a particular shopping street.

## Trade Area Soci-Economics

### 10-minute Walk Population/10-minute Drive Population



The local trade area population within a 10 minute walk (<1km) of the main intersection of the Main Street is an important factor, especially for local neighbourhood retail. Achieving a local population threshold of 7,000 is important for local retailers and higher than that means retail can be very successful. Retailers should understand that pedestrians have

ancillary needs to be provided, such as tie up hooks for dogs, lock-up requirements for strollers, etc.

For a regional destination, the population within a 10-minute drive time is important to support comparison and destination-type shopping on a regular day-to-day basis.

#### 10-minute Bike Population and 10-minute Public Transit Population

The two extremes of 10-minute walk and 10-minute drive include a whole range of other modes of transportation within them. There is a 10-minute bike, 10-minute public transit, as well as combinations of two or more methods. Care and consideration should be given to lock-up facilities for bicycles and transitoriented development as they can impact potential retail development opportunities.

### Population Growth



It is important to understand the general population growth direction and whether there is fast or slow paced change. For many areas, gentrification is a key factor for urban revitalization because it means that consumers will have more money to spend on retail products.

## Household Income



Another key factor is household income. Higher household income areas and areas that are gentrifying towards increased income are more desirable. However, if there is a high density of residents and incomes are moderate to lower, then certain kinds of retailers that serve these

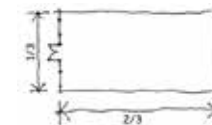
segments will be attracted to those areas as well. The retail should match the area's income profile.

## Individual Site Principles

### Space Configuration



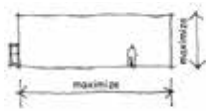
**Length of frontage:** Although this changes by the type of retailer and the amount of space being used, generally a food service may prefer a wider frontage, which allows greater visibility into the space whereas a retail merchandiser would prefer a narrower entrance allowing longer walls to place merchandise upon.



#### Frontage to depth of space relationship:

Except in the case of very small spaces, the best configuration of space for a retailer is a one third/ two third ratio, with the frontage being one third. This allows for good open frontage but also provides walls for merchandising and back-of-house space. Main street retail units should not be too deep. Often 30 m is sufficient. Some municipalities limit the depth of retail units to ensure they are fit in. The exception would be for larger retailers such as supermarkets, pharmacies, etc. However, often main streets prefer a fine grain street frontage with more smaller to medium sized retail units. A good mix of different retail sizes are preferred including 100 m<sup>2</sup>, 150 m<sup>2</sup>, 300 m<sup>2</sup>, 500 m<sup>2</sup>, etc.

## Internal Characteristics



**Column spacing:** Fewer columns in retail space are more desirable as it makes the space more flexible. This can be an issue in redeveloped buildings but also new buildings that have residential or

commercial above. In both these cases, the other uses do not require the open space thus burdening the retail space with columns that make selling space more difficult to merchandise. Columns should not be placed near the front of the retail unit as they block the views into the store by pass-by traffic.

**Ceiling heights:** The minimum height is 2.5m but most retail should be developed with 4.5m or higher. This is because it allows for more light and an open feeling even in small spaces.

## Useable Outdoor Space



Patios are particularly desirable for food service, even in a climate like Calgary's where creative business owners can cater to the customers' desire to be outside.

## Storefront Presentation



**Second floor retail** – dense, high rent precincts are reintroducing the two-story retail typology. Second floor retail configurations are not without their problems, garnering a much smaller number of shoppers than their first floor counterparts. Second floor retail can also 'syphon' activity from the street, creating a negative impact on shops located there and making the street feel less lively.

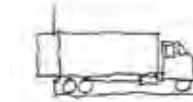
**Showcase windows** – retailers are often mandated to provide a minimum of 60% to 70% of their storefront façade as window wall, allowing pedestrians to see merchandise, window displays and public service announcements rather than blank walls that are more subject to graffiti and general disrepair. That said, retailers must undertake regular and rigorous maintenance.

## Amount and Location of Parking



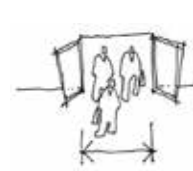
Generally, all retailers will want as much parking as possible and parking that is dedicated to their store. Grocery stores have very specific needs for close, dedicated parking and will refuse space that does not meet their criteria, as convenience is critical to their success. Other kinds of retailers may have more flexibility, especially if their products can be carried easily. Regardless, any Calgary retailer will need accessible parking within walking distance.

## Site Characteristics



**Loading access** – this is more important for retailers of large-scale merchandise or that have larger stores. National brand retailers are likely to use transport trucks for distribution and accommodating this size of delivery vehicle can be problematic in tighter urban spaces. Loading areas, especially those associated with restaurants, are prone to messy or nuisance refuse and should be regularly maintained.

**Garbage collection** – the provision of sufficiently sized garbage/recycling storage is a must in the promotion of retail streets. They must be maintained on a regular basis because they will show wear and tear from frequent use. For food services, the location of a cold waste room is very important unless there is constant waste pickup.

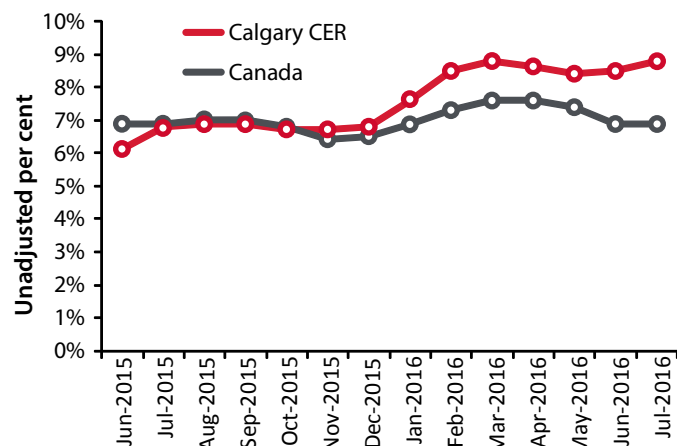


**Access/egress** – entries should be generous and well situated in order to allow easy access and egress. A well-sized, prominently located entry is also more visible and inviting to shoppers.

**Attractiveness** – shop fronts must be attractive and well designed. Materials should be durable and easily maintained, requiring minimal maintenance.

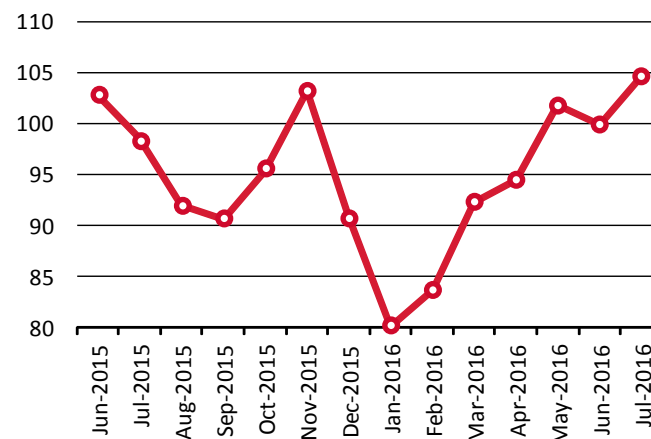
## Appendix F – Socio-Economic Factors and Data Updates

▼ Figure 11: Calgary Unemployment Rates



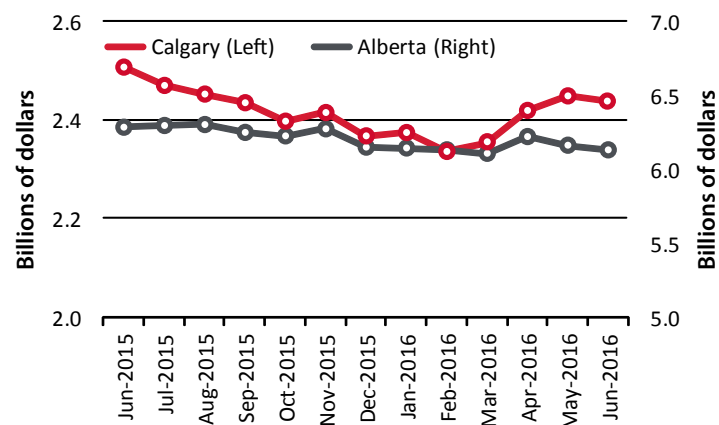
Source: The City of Calgary, Corporate Economics

▼ Figure 13: Canada: Index of Consumer Confidence (2014 = 100)



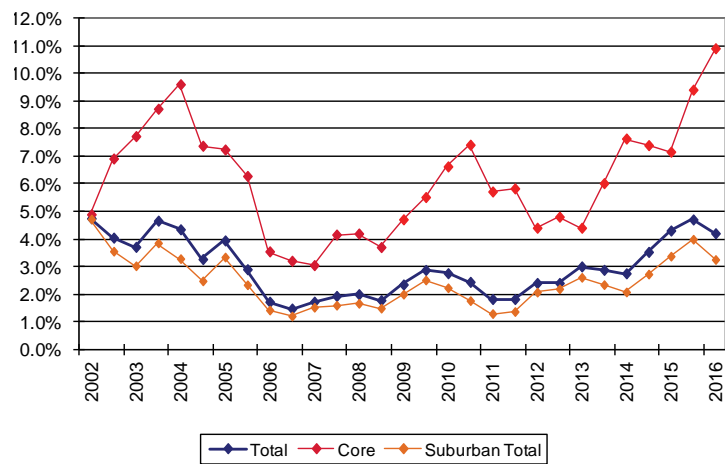
Source: The City of Calgary, Corporate Economics

▼ Figure 12: Calgary and Alberta Retail Sales



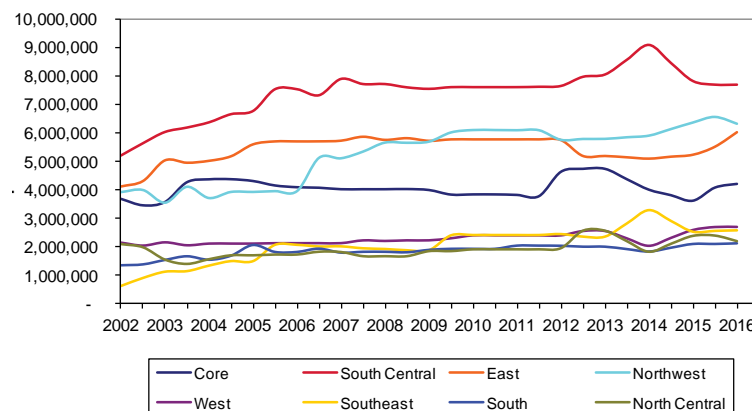
Source: The City of Calgary, Corporate Economics

▼ Figure 14: Calgary Retail Vacancy Rates



Source: CBRE Marketview

▼ Figure 15: Calgary Retail Floorspace by District



Source: CBRE Marketview

**Note:** As an alternative source for data was used, the sectors above do not correspond to those in this report.



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