North Battleford

Retail Gap Analysis

SUBMITTED BY
FBM Architecture Ltd

May 2025

Land acknowledgement

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

City Disclaimer

This report is intended to inform and inspire but like any business venture, success depends on many factors. While the consultant has done their best to present accurate and useful information, the City of North Battleford cannot guarantee business outcomes or be held responsible for any decisions made based on this report. Starting or expanding a business always involves risk, and we encourage all entrepreneurs and investors to do their own due diligence and seek professional advice.

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FBM

Preface

FBM Architecture Ltd. ("FBM") was commissioned by the City of North Battleford to conduct a Retail Gap Analysis across the city including the downtown. The study was carried out over the period of November 2024 to May 2025. On-the-ground fieldwork in the study community was carried out in November 2024.

The objective of this study is to throughly document the current business inventory and define the Trade Area they serve. The purpose of this research was to identify the existing gaps and opportunities for retail, which would also help the City of North Battleford identify investment and business attraction opportunities in support of local economic development and municipal plans.

Taking a methodical approach, FBM analyzed the business inventory and consumer spending patterns. For the purposes of identifying the business counts by business category, FBM applied its own business classifications for retail and services to provide additional depth to the overall analysis. In doing so, FBM still recognizes and attempts to adhere to the North American Industry Classification System (NAICS) designations as an alternate method of tabulation. However, some deviations exist based on our professional interpretation of the business typology, particularly within the Retail Trade sector.

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

This analysis was conducted by FBM as an objective and independent party. As is customary in an assignment of this type, neither our name nor the material submitted may be included in a prospectus.

FBM 2025

Glossary of Terms & Acronyms

sf - square feet

psf - per square foot

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

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

Department Store Type Merchandise (DSTM) - is an industry term often synonymous with "Comparison Merchandise and includes categories such as Fashion, Home Decor, Appliances and Electronics, Sporting Goods, etc, or categories that are typically found in more traditional "mall" or shopping centre environments, where comparing of products is common.

Quick Service/Limited Service F&B - This represents fast food, grab-and-go, take-out only, or drive through types of restaurants, such as McDonald's, Tim Horton's or other cafe/coffee shops.

Full Service F&B - This represents restaurants or pubs that include table service seating or servers for meals and beverages.

Specialty Retail - This category of retail typically is a "catch-all" for a wide range of store types such as pet foods, arts & crafts, cellular phones, office supplies/ stationery, etc.

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

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

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

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Introduction

The objective of this study is to throughly document the current business inventory and define the Trade Area they serve. The purpose of this research was to identify the existing gaps and opportunities for retail, which would also help the City of North Battleford identify investment and business attraction opportunities in support of local economic development and municipal plans.

Trade Area

The North Battleford retail trade area population for 2024/25 is estimated to be 41,171. Growth forecasts for the next decade suggest that the trade area population could increase to 42,957 (at an annual growth rate of 0.40%).

The trade area has a median age of 41.3, which is higher than the provincial median of 38.8. The proportion of seniors (aged 65 and over) is higher within the trade area (21.34%) than in the province of Saskatchewan as a whole (17.95%).

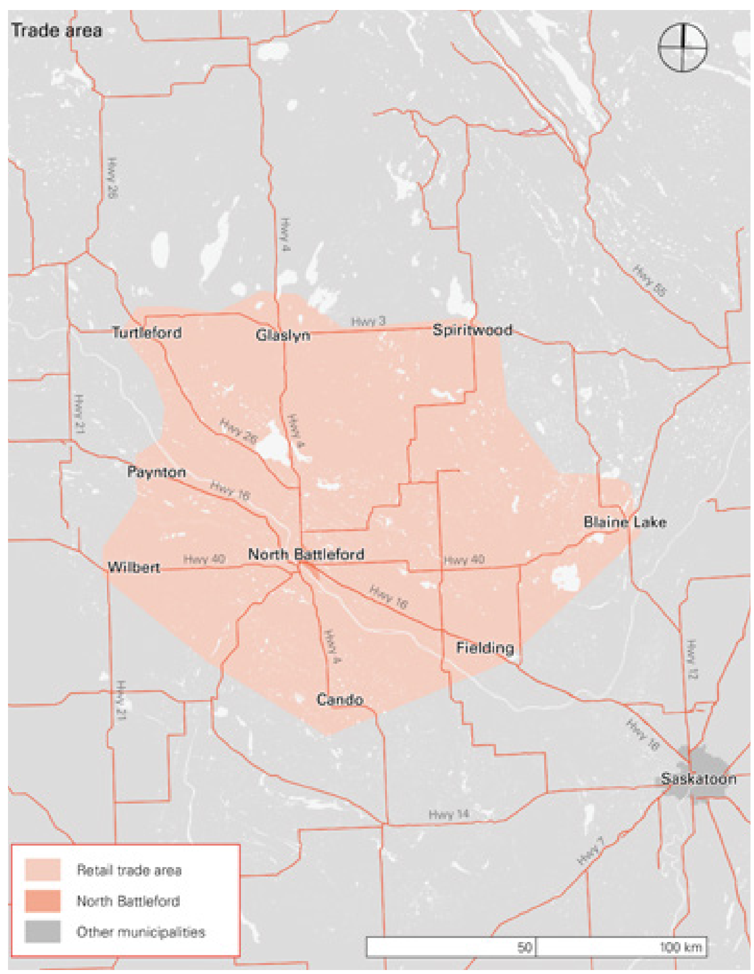
Total retail spending in North Battleford's trade area is estimated at $667.8 million for 2024. This includes spending across a wide variety of retail categories, ranging from grocery to automotive and health care services. Excluding health care services and automotive categories (which include fuel, parts, and vehicles), the total spending amounts to $433.6 million on specific retail merchandise categories.

Total retail miscellaneous inflow spending for 2024 is estimated at a not inconsequential figure of $35 million and is expected to increase to $44 million by 2034. Miscellaneous inflow spending is derived from passing motorists, visitors, or infrequent residents from outside of the normal, everyday trading region for North Battleford.

Excluding auto categories, the top annual retail spending segments include:

1. Grocery & Convenience: $115.5 million
2. Home Improvement & Garden: $45.5 million
3. Restaurants & Pubs: $38.9 million
4. Fashion & Accessories: $31.2 million
5. Quick Service F&B: $29.1 million

The dominant CanaCode Lifestyle Cluster in the North Battleford trade area is "J: Joyful Country", accounting for 28.28% of the trade area households, compared with 5.7% nationally.



Cluster

J Joyful Country

5.7% of Canadian households

AVERAGE HH INCOME
$ 117 K

Average Home Value
$608,475

AGE
55-64

VEHICLE
Chevrolet, Ford, Dodge, GMC, like SUVs and Pick-up trucks

FAVOURITE COFFEE SHOP
Tim Hortons, McCafé, Country Style

FAVOURITE SOCIAL MEDIA
Pinterest

ACTIVE IN: Snowmobiling, fishing, hunting, cross country skiing, power boating

PSYCHOGRAPHICS/HEALTH CONCERNS: **Adventurous/outdoorsy**, less social life, family oriented

SPEND MONEY ON: Giant Tiger, online shopping, Co-op, No Frills, MAXI, IGA/Foodland

INVEST WITH: Credit Union, Mutual Fund

The population in this Lifestyle Cluster includes rural households that spend more than the Canadian average on their homes, gardening, recreation vehicles, boats, motorcycles, gasoline and fuel, medicine, and bingo.

Many in this Joyful Country lifestyle segment work in rural industries such as natural resources, agriculture, trades, transportation, and heavy equipment operations, and they hunt and fish more than average. Their shopping preferences include everyday retailers such as Giant Tiger (which recently closed its North Battleford location in addition to other Saskatchewan locations), as well as online shopping.

Trends in E-Commerce and Online Shopping

According to Statistics Canada, online retail sales accounted for 14.1% of total retail trade in 2022, up from 11.5% in 2020. This percentage is forecast to grow steadily as Canadians become more accustomed to online shopping as part of their day-to-day social media activities.

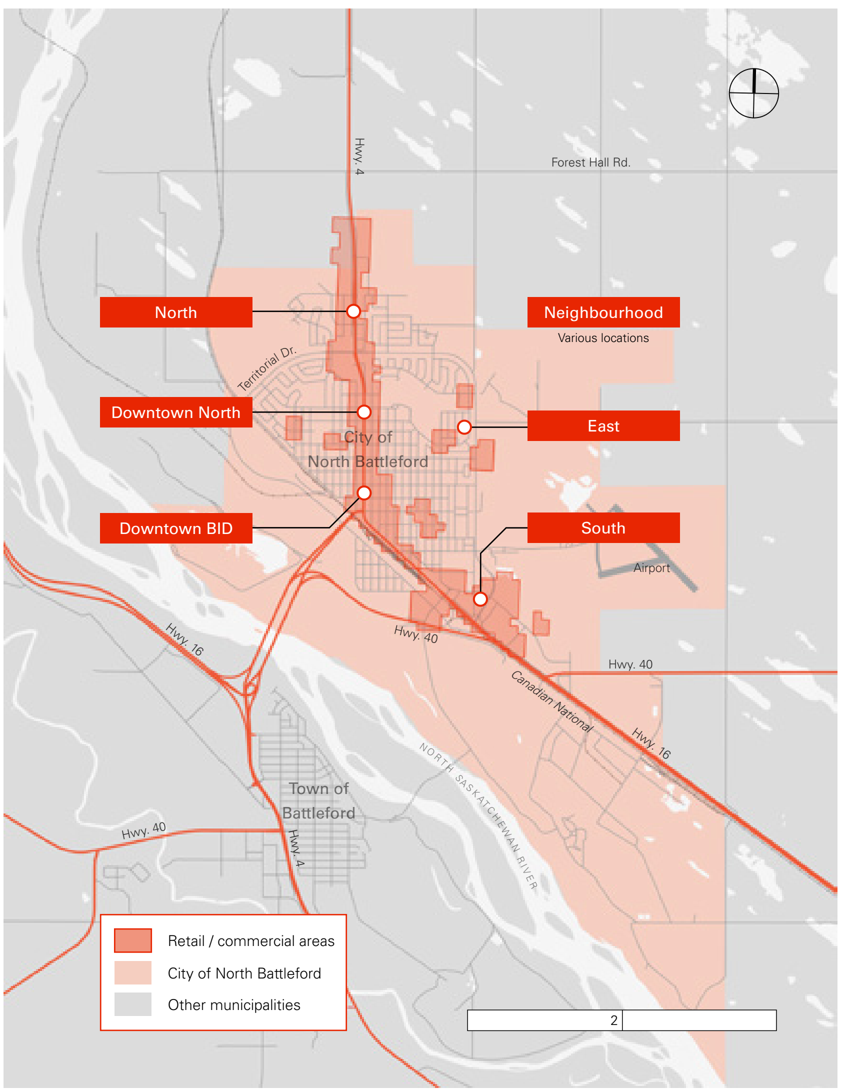
Canadians are increasingly opting for online shopping, with 67% of Canadian consumers reporting that they buy products online at least once a month. This preference is most prominent in major urban areas like Toronto, Vancouver, and Calgary.

The number of e-commerce users in Canada has risen steadily over the past 5 years, from 16.4 million digital buyers in 2020 to 25.16 million buyers in 2024.

Statista reports on a consumer survey that found most shoppers prefer in-person shopping, which supports the idea that when Canadian consumers feel in-person shopping is an option, they will choose this over online shopping.

The two leading retail categories for 2024 e-commerce in Canada are fashion with a 21% market share followed by electronics with an 18% share.

North Battleford retail nodes



Retail Supply Summary

FBM documented the City of North Battleford's existing retail inventory through fieldwork conducted in November 2024, supplemented and validated by subsequent desktop research. Various aspects of North Battleford's retail stock were recorded including business names, addresses, merchandise categories, estimated unit sizes, vacancies, and North American Industry Classification System (NAICS) codes.

Across the entire city, there is an estimated retail inventory of just under 1 million sf (996,175 sf) with a vacancy rate of 9.9%.

For the purposes of this study, FBM grouped the retail inventory into six nodes:

1. Downtown Business Improvement District (BID), which has a retail inventory of 212,640 sf and a vacancy rate of 15.2%.
2. Downtown North (100th St between 14th & 20th Ave), which has a retail inventory of 87,273 sf and a vacancy rate of 9.8%.
3. North (100 St, north of 20th Ave), which has a retail inventory of 243,826 sf and a vacancy rate of 0.3%.
4. South (either side of Hwy 16), which has a retail inventory of 416,840 sf and a vacancy rate of 10.5%.
5. East (primarily near Territorial Drive & 15th Ave), which has a retail inventory of 24,036 sf and a vacancy rate of 41.5% (comprised of mostly new retail now leasing).
6. Neighbourhood (outlying local retail), which has a retail inventory of 11,560 sf and a vacancy rate of 8.5%.

The current overall vacancy rate of all street level commercial is estimated at 9.9% (169,530 sf). At the nodal level, the vacancy rate varies across the city with the most prominent vacancies in the Downtown BID and South Nodes.

Vacancy in North Battleford is higher than what is normally considered acceptable in a healthy retail market, with opportunity to support new demand for retail space.

A driving factor in the higher vacancy rate is the presence of larger vacant spaces at the former Giant Tiger in the downtown (21,872 sf), which closed in 2024, and the soon-to-be vacated Peavey Mart in the South node (27,717 sf). Additionally, the former Gamex Bingo (15,974 sf) located in a semi-industrial area south of the railway tracks is also vacant, but because of its industrial location is excluded from the vacancy figures.

Vacancies in the new Eagles Landing development (17 units each around 1,200 sf plus a pad site near the new Starbucks) will gradually be absorbed and will mitigate the high overall vacancy rate, while Downtown revitalization efforts, including a new tax incentive policy, may help to lower the vacancy rate in the city centre.

In a scenario in which the 2 largest retail vacancies as well as new space under construction at Eagles Landing were not part of the vacancy, the overall vacancy rate would drop to approximately 6.1%. This illustrates the significant impact that larger retailers can have on a community if they do not succeed.

Priority should therefore be placed on trying to backfill the two largest vacancies with retailers compatible in the market such as Value Village, Winners, JYSK, etc. The alternative for spaces like the former Giant Tiger might be to consider non-retail or community uses such as a conversion to indoor pickleball courts or other possible commercial recreation uses like SNAP Fitness, Planet Fitness, or Goodlife Fitness.

The top occupied retail categories by square footage are shown below, excluding non-retail segments and auto service:

- Grocery, convenience and specialty foods (168,937 sf)
- Home improvement & gardening (137,782 sf)
- Auto/RV/motorshops dealerships (112,009 sf)
- Fashion & Accessories (101,931 sf)
- Restaurants & Pubs (93,786 sf)

Retail Demand

North Battleford's Trade Area residents currently garner just over 45% of the available Trade Area spending. This means that almost 55% of the resident Trade Area spending is spent outside of the community in competing regions like Lloydminster or Saskatoon.

The estimated market shares reveal that a category such as Grocery & Specialty Foods is capturing almost 75% of the Trade Area spending, which is very strong and supported by the mix and distribution of retailers such as Co-op, Sobeys, Walmart, and No Frills.

As North Battleford continues to grow at conservative rates, there are opportunities to deepen the market penetration and market capture of trade area spending that emphasizes the beneficial geographic positioning of North Battleford, even in the face of other strong competitive areas like Lloydminster, which benefits from its lack of a provincial sales tax. That said, North Battleford is the centrality to a well-established and recognized retail trade area.

Based on maintaining the current market share of demand, the analysis reveals that by 2034, North Battleford could support approximately 230,000 sf of additional new retail space.

The biggest challenge for North Battleford lies in its higher than average vacancy, which includes two notable approximate 20,000 sf spaces, which should be prioritized for backfilling. When considering the current higher vacancy in the city, estimated at almost 170,000 sf, it is reasonable and realistic to suggest that the net amount of new floorspace in the city may not be 230,000 sf, but rather somewhere in the range of 150,000 sf that takes into account the retenanting of existing vacancies in the market.

The area of most opportunistic growth, with a forecast of almost 97,000 sf, could lie in the Department Store Type Merchandise (DSTM) categories, which could include notable retailers like Winners, Marshalls, Value Village, or Goodwill.

Similarly, leisure and recreation uses could be filled by targeting concepts like Goodlife (and its smaller version Fit4Less), Planet Fitness, or SNAP Fitness.

For the purposes of longer term planning, it could be reasonable to expect 10 to 15 acres of potential retail development over the next decade to meet future retail demand.

This assumes that new floorspace would be allocated across a combination of new development, most likely at Eagles Landing in the East node, in lands behind Frontier Centre in the South node, as well as some in the North node. The Downtown and Downtown North nodes would likely see limited new growth other than in existing vacant redeveloped lots.

If the retained market shares presented previously were to increase by an overall 4% by 2034 (from 45% to 49%), the total demand by the year 2034, based on conservative population growth but with spending growth and increased retention, could result in incremental new space of approximately +/-355,000 sf, or 125,000 sf more than if the current market shares are maintained.

Two Scenarios for 10-yr New Demand

Total 10-yr New Demand by 2034 with CURRENT Market Share & Nodal Allocation (sf / acres)			North Battleford: % Share of Demand	Share of Demand (sf)	Site Coverage Ratio	Net Land Area (acres)
Total	**229,181**	**11.1**	**100%**	**229,181**	**0.48**	**11.1**
		Net demand		149,181	0.5	7.4
		Vacancy Factor		80,000	0.5	3.7
		Downtown BID	5%	7,459	0.8	0.2
		Downtown North	0%	0	0.5	0.0
		North	25%	37,295	0.3	2.9
		South	40%	59,673	0.3	4.6
		East	30%	44,754	0.3	3.4

Total 10-yr New Demand by 2034 with INCREASED Market Share & Nodal Allocation (sf / acres)			North Battleford: % Share of Demand	Share of Demand (sf)	Site Coverage Ratio	Net Land Area (acres)
Total	**355,086**	**16.7**	**100%**	**355,086**	**0.40**	**20.4**
		Net demand		275,086	0.4	16.7
		Vacancy Factor		80,000	0.5	3.7
		Downtown BID	5%	13,754	0.8	0.4
		Downtown North	0%	0	0.5	0.0
		North	25%	68,771	0.3	5.3
		South	40%	110,034	0.3	8.4
		East	30%	82,526	0.3	6.3

Like the previous scenario, however, vacancy absorption would need to be factored into any future demand. Therefore, it would be reasonable to forecast that under an increased market share scenario, future demand could still be in the range of 275,000 sf.

Under either scenario, North Battleford has demand and support for conservatively +/- 150,000 to 275,000 sf if one considered an average of the two scenarios.

Future Land & Floorspace Allocation

With conservative population increases, combined with marginal increase in overall market share of trade area spending, North Battleford could add to its net new retail inventory by anywhere from 150,000 sf to 275,000 sf in specifically targeted categories/business types by 2034, depending upon how the area is marketed by the municipality and businesses-alike.

Prospects of new retail are favourable for being drawn predominantly to Eagles Landing in the East node, north of the Frontier Centre in the South node where other new-to-market brands have recently opened, or are soon-to-open and where land is investment-ready to build.

With respect to land absorption, 7.5 to 17 acres could reasonably be expected, comprised of redevelopment, infill, and greenfield sites.

Target Retail Opportunities

The current retail market is absent of a few immediate opportunities for whom vacancies and/or land exists. Persistence is also critical when many brands may not be "ready at this time" for a rural or secondary market, as opposed to a focus on "larger, more urban" markets.

Retail growth for North Battleford should be premised not on the quantity of retail, but rather the quality of the retail offering so that businesses can succeed. Rather, a mix of brands as shown as well as a strong local business such as another Brewery-type licensed, full-service establishment would respond well to consumer desires and sentiments.

The retail demand forecasts suggest a good opportunity for future retail and there are tenants capable of moving the needle for sales retention and attraction in North Battleford. Most notably, these include. but are not limited to the following near (<5 years) to medium (5 to 10 years) target retail brand or franchise prospects.

Retailer (Brand / Franchise)	Merchandise Category Segment	Time Horizon Near Term 2025 to 2030	Time Horizon Long Term 2030 to 2035 +
VineCo	Alcohol, Tobacco & Cannabis	✓	
Vintners Cellar	Alcohol, Tobacco & Cannabis		✓
Wine Kitz	Alcohol, Tobacco & Cannabis	✓	
Brown's Social House	F&B Restaurant - Full Service		✓
Canadian Brewhouse	F&B Restaurant - Full Service		✓
IHOP	F&B Restaurant - Full Service	✓	
Original Joe's	F&B Restaurant - Full Service	✓	
Ricky's All Day Grill	F&B Restaurant - Full Service	✓	
State & Main Kitchen	F&B Restaurant - Full Service		✓
Swiss Chalet	F&B Restaurant - Full Service	✓	
Carl's Jr	F&B Restaurant - Quick Service		✓
Cora's	F&B Restaurant - Quick Service	✓	
Fatburger	F&B Restaurant - Quick Service	✓	
Firehouse Subs	F&B Restaurant - Quick Service	✓	
Five Guys Burger & Fries	F&B Restaurant - Quick Service		✓
Fresh Slice Pizza	F&B Restaurant - Quick Service	✓	
Good Earth Coffee	F&B Restaurant - Quick Service		✓
Harvest Eats	F&B Restaurant - Quick Service		✓
Jersey Mike's Subs	F&B Restaurant - Quick Service	✓	
Mary Browns	F&B Restaurant - Quick Service	✓	
Mezza Lebanese	F&B Restaurant - Quick Service		✓
Mucho Burrito	F&B Restaurant - Quick Service	✓	
Oodle Noodle	F&B Restaurant - Quick Service	✓	
Opa	F&B Restaurant - Quick Service	✓	
Osmow's	F&B Restaurant - Quick Service	✓	
Popeye's	F&B Restaurant - Quick Service	✓	
Second Cup	F&B Restaurant - Quick Service		✓
Taco Bell	F&B Restaurant - Quick Service	✓	
Wok Box	F&B Restaurant - Quick Service	✓	
Marshall's	Fashion, Footwear & Accessories	✓	
Winners	Fashion, Footwear & Accessories	✓	
Fit4Less Fitness (by Goodlife)	Fitness & Leisure		✓
Planet Fitness	Fitness & Leisure	✓	
SNAP Fitness	Fitness & Leisure	✓	
Goodwill Donation Centre	General Merchandise	✓	
Real Canadian Superstore	General Merchandise		✓
Real Canadian Wholesale	General Merchandise		✓
Value Village	General Merchandise	✓	
Cobs Bread	Grocery & Specialty Foods	✓	
FreshCo	Grocery & Specialty Foods		✓
Save on Foods	Grocery & Specialty Foods		✓
JYSK	Home Furnishings & Décor	✓	
Sleep Country Canada	Home Furnishings & Décor		✓
Martinizing Dry Cleaning	Personal Service	✓	
First Choice Haircutter	Personal Service	✓	
Popeye's Supplements	Specialty Retail	✓	
Supplement King	Specialty Retail	✓	
Global Pet Foods	Specialty Retail	✓	
Petland	Specialty Retail		✓

1.0 introduction

1.0 Introduction

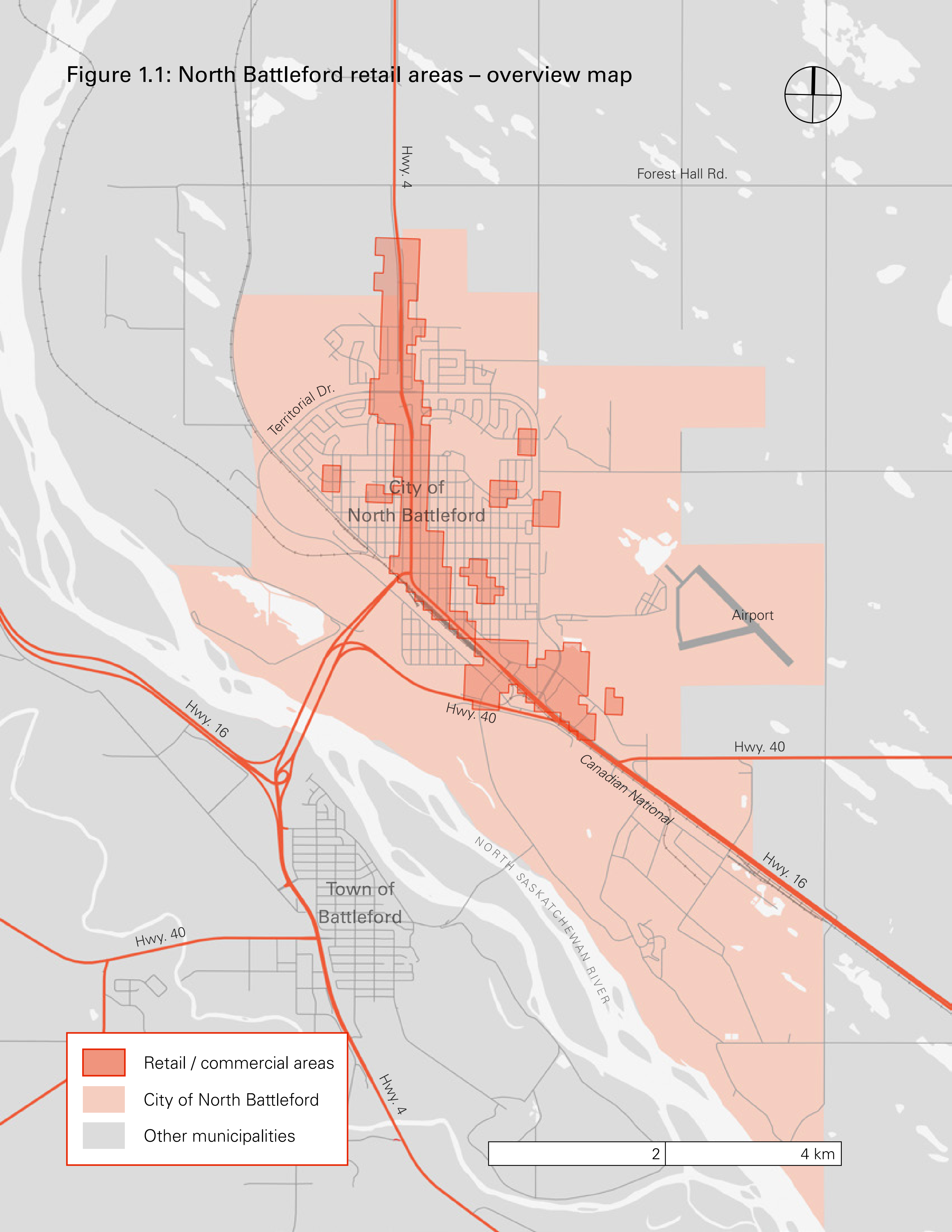
1.1 Scope of study

The purpose of this study is to objectively document and provide a market-driven analysis of the City of North Battleford's ground floor, street-oriented retail environment. The study examines retail nodes throughout the city in detail across a range of retail merchandise categories/store types.

1.2 Report structure

- **Section 1 – Introduction**: Introduces the study process and structure.
- **Section 2 – Regional and local context**: Describes the local and regional context of the City of North Battleford in terms of geographic location, regional access and traffic counts, and relevant plans, studies and initiatives.
- **Section 3 – Trade area & trends**: Identifies and defines North Battleford's retail trade area. Provides demographic information including retail spending along with industry trends shaping consumer spending and purchasing habits.
- **Section 4 – Commercial supply**: Provides a detailed documentation, tabulation and summary of the City of North Battleford's predominantly ground-oriented retail and commercial business mix. This section also assesses the location and characteristics of North Battleford's nodes of retail activity, including developing or planned future retail sites. Fieldwork assessment included the identification and documentation of the City's existing retail inventory by retailer, merchandise category, and NAICS industry classification.
- **Section 5 – Market demand assessment**: Quantifies the estimated future retail demand over the next 10 years. Based on an extensive assessment of the current retail supply and trade area spending, the current demand is then estimated and measured against the market potential.
- **Section 6 – Key findings**: Synthesizes gaps and opportunities for the retail market and identifies strategic actions that could be taken in the short and longer term to strengthen existing businesses, support new businesses, and help attract investment activity.

Figure 1.1: North Battleford retail areas – overview map



2.0
regional & local context

2.0 Regional and local context

2.1 Introduction

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

2.2 Regional and local context

The City of North Battleford had a population of 13,836 during the 2021 census, while the North Battleford Census Agglomeration (CA), which includes the neighbouring Town of Battleford, had a population of 19,374. Collectively known as "The Battlefords", this census metropolitan area (CMA) is strategically located in central-western Saskatchewan at the crossroads of the Yellowhead Highway (Saskatchewan Highway 16) and several other important provincial roads, including Highways 4 and 40. Saskatoon is located some 120 km to the southeast. The current 2024 estimated CMA population for North Battleford is 20,736.

Surrounded by the predominantly agricultural Rural Municipality of North Battleford No. 437, the City of North Battleford is located within a farming region that includes numerous smaller towns that depend on The Battlefords for some goods and services. The area is located within the vast Treaty 6 Territory that covers much of Saskatchewan and Alberta.

North Battleford is a centre for commercial activity, industry, and public administration. Major industries include wholesale trade, construction, and various services catering especially to the agricultural and energy sectors. The provincial government is a major employer, in particular the Saskatchewan Health Authority which operates a 284-bed psychiatric hospital completed in 2018. The city is a centre is home to the North West College campus as well as several smaller institutes and training schools.

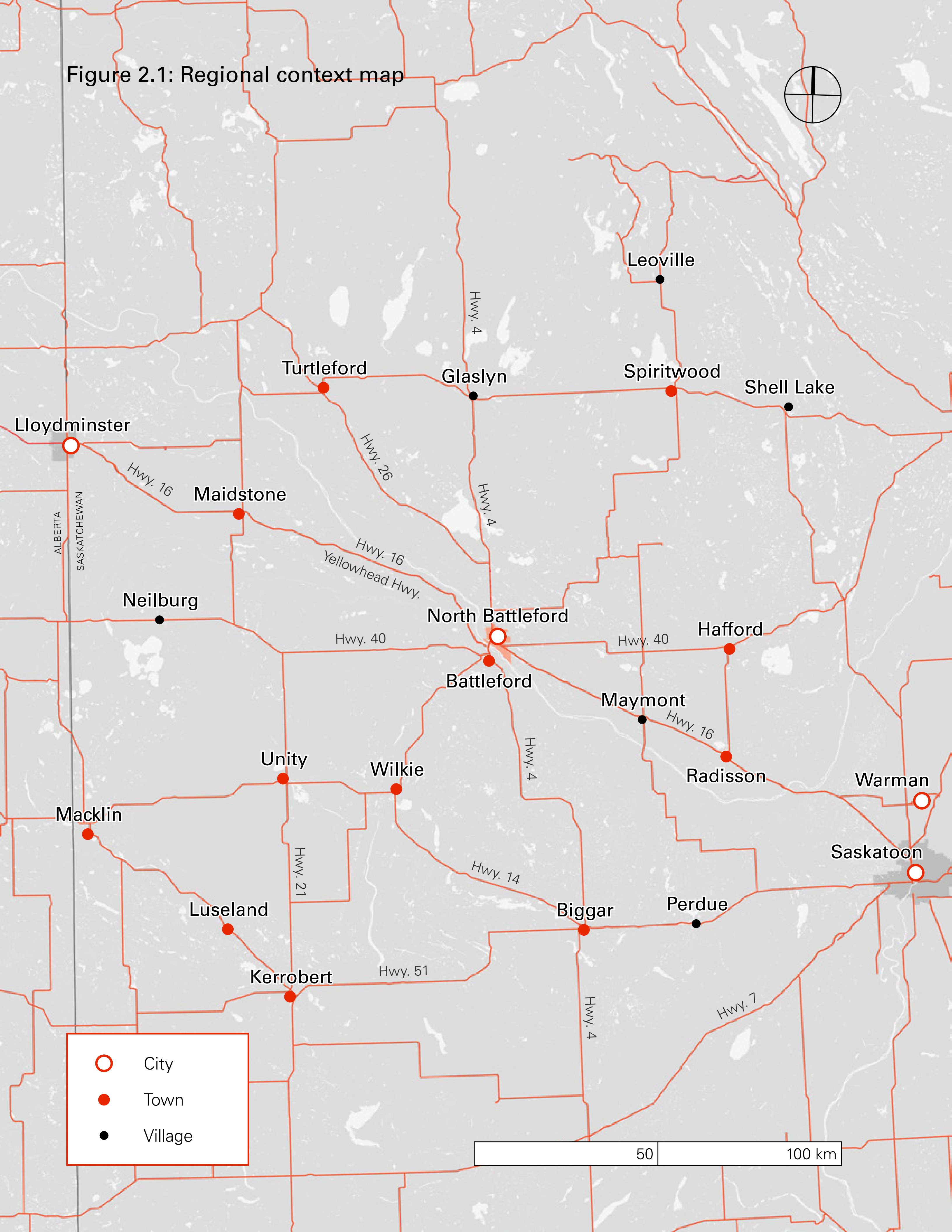
2.3 Relevant plans and studies

Official Community Plan

Adopted in accordance with provincial planning legislation, North Battleford's Official Community Plan (OCP) guides growth and development in the community. It identifies various community planning goals and lays out land use policies to help ensure that development contributes toward those objectives. The OCP also sets out statements of policy on economic development, investment in public works, land management with respect to the natural environment, and various other planning matters. The plan was drafted over a decade ago but has been regularly updated by Council.

Among the various goals of the OCP, some are particularly relevant to commercial and retail development in the city. A few of these are outlined below, along with some discussion of their implications with respect to retail development:

Figure 2.1: Regional context map



- "To promote the redevelopment of lands with existing infrastructure and public services and the maintenance and rehabilitation of existing residential, commercial and industrial properties and structures." Like many other North American cities, North Battleford possesses a historic downtown core with an older building stock, as well as newer retail centres near the edges of the city. It is important to balance new greenfield growth with the need to support downtown revitalization through infill development and prudent use of existing infrastructure assets.
- "To provide for a development climate that will enhance the City's commercial and industrial sectors."
- "To improve the aesthetics of the key entryways into the City and use them to promote the City and its businesses, attractions and culture." North Battleford's three retail clusters are all located at key entry points to the city.
- "To facilitate neighbourhood and commercial development that provides for a high quality of life for residents, by providing for healthy transportation options, mixed-use developments, and consistent standards for development across jurisdictions."

The OCP identifies four types of commercial land use in the city, namely: Neighbourhood Commercial, Downtown Commercial, Regional Commercial, and Arterial Commercial.

Neighbourhood Commercial – This land use designation was applied sparingly to smaller-scale instances of commercial land use in predominantly residential areas. Municipal policy regarding this type of retail is to "encourage the development of small-scale office, retail and other services in appropriate areas within the City's residential neighbourhoods" (Official Community Plan, p. 16).

Downtown Commercial – As the name suggests, the Downtown Commercial land use designation applies to the core of North Battleford and OCP policy is to "support downtown's role as the City's central business, cultural, and entertainment activity core". To do this, the City aims to "promote and encourage the revitalization of the city's downtown commercial area" using a variety of strategies including public realm investment, development incentives and rebates, and infrastructure improvements. The downtown is envisaged as a mixed-use community with higher-density residential development and an increased concentration of amenities to improve liveability – altogether creating "a highly desirable urban community".

Regional Commercial – The OCP notes that Regional Commercial land uses serve a wide regional trade area and include the City's big-box developments in the vicinity of Territorial Drive and Railway Avenue.

The OCP aims to provide sufficient land for the development of Regional Commercial uses and to ensure this development takes place "where access to transportation networks can be optimized", providing easy access to both local and regional customers (Official Community Plan, pp. 19–20).

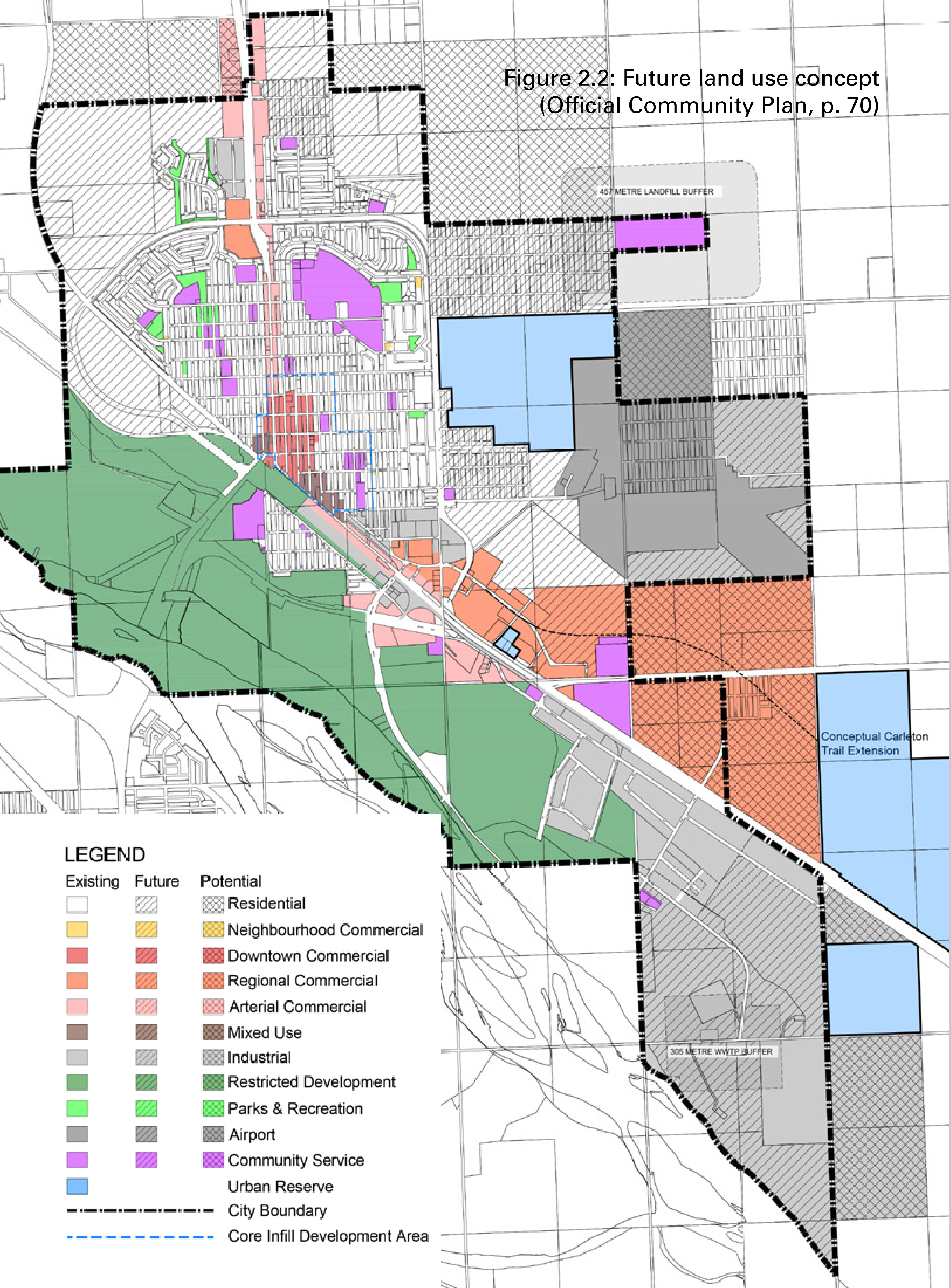


Figure 2.2: Future land use concept (Official Community Plan, p. 70)

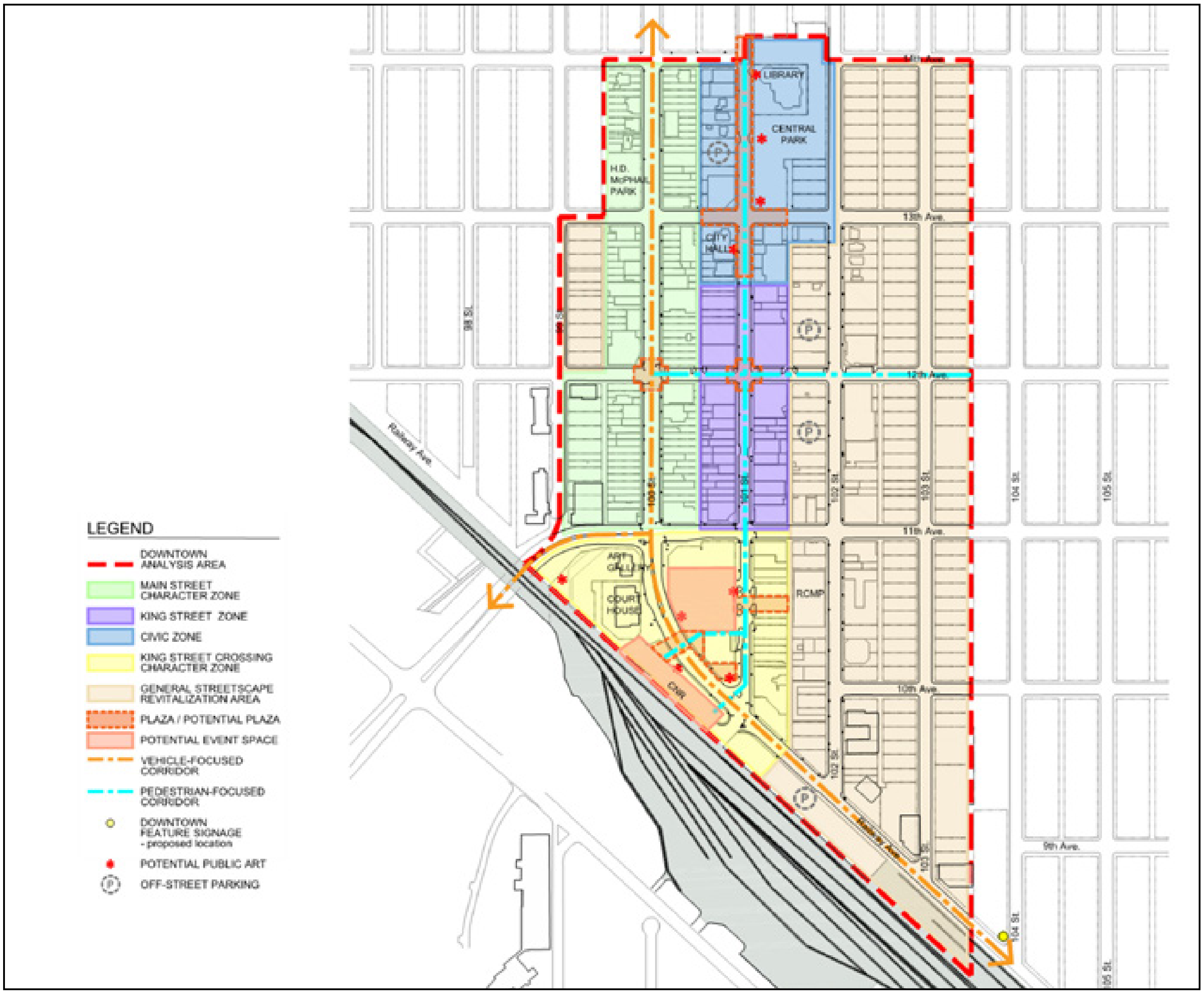


Figure 2.3: Streetscape framework for downtown North Battleford (Downtown Master Plan, p. 26)

Arterial Commercial – Areas designated for Arterial Commercial development include Highway 4 north of downtown (including parts of 99th and 100th streets) as well as lands along Railway Avenue and the Yellowhead Highway in the south-eastern part of the city. These areas are intended to provide for "a wide range of arterial commercial and other compatible uses".

According to the OCP, it is a municipal objective "to promote the expansion of existing arterial and regional commercial operations and encourage new development in existing arterial and regional commercial areas". Such development is intended to form gateways to the city that are visually appealing, safe, and accessible.

Infill development is encouraged. According to Objective 3.2.2.2, policy (3), the City aims to "identify commercial opportunity zones, within the existing built environment, and encourage infrastructure-supported increases in density through the development of vacant, infill, and underutilised commercial parcels" (Official Community Plan, p. 17).

One of the City's primary economic development goals is to "strengthen and expand the role of North Battleford as a regional centre for shopping, business, health, education, tourism, and services to the resource centre".

Regarding commercial development specifically, municipal policy is to "facilitate the growth of all commercial areas (i.e. core, neighbourhood, arterial and regional) by recognizing the individualized needs of each area while making a coordinated effort to create balanced and distinct commercial nodes throughout the city" (Official Community Plan, p. 30).

Downtown Master Plan

Also known as the Downtown Revitalization Action Plan, the Downtown Master Plan (DMP) was developed in 2017 and establishes a vision for the downtown area as well as a series of strategies to help achieve that vision. The document is intended to guide development in Downtown North Battleford over a period of 25 years.

Background – Downtown North Battleford, one of the City's three retail districts, faces various challenges. It has suffered from a relatively high vacancy rate for many years partially attributable to an older-than-average building stock. Downtown is considered to have an excessive amount of parking, which benefits businesses to an extent by encouraging exploration and window-shopping activity, but can also detract from the streetscape appeal. Public engagement participants also felt that the downtown was neglected in general, suffering from poor upkeep, and perceived safety and comfort issues.

Vision – The Downtown Master Plan establishes the following vision: "Downtown North Battleford is the place to be – an active and inviting boutique shopping destination with a mix of retail, restaurants, and events.

The downtown is a safe and lively environment that encourages walking and rewards exploration. The downtown is the beating heart of North Battleford – the place where its past, present and future converge, and its citizens come together."

The vision for Downtown incorporates a desire among members of the public to support a uniquely urban style of commercial development in the city centre, with sidewalk cafés, "unique boutique shops and restaurants", and more street activity and walkability. The vision aims to strengthen Downtown North Battleford, building upon its historical importance as the heart of the city and a destination for visitors.

Recommendations – The Downtown Master Plan makes numerous recommendations to improve the downtown area in various respects: economy, safety, community amenities, and architecture. Some of the recommendations that pertain to downtown retail and commercial development in particular are outlined in the following:

- The introduction of a tax incentive (tax abatement) program to help offset the cost of development projects and exploration of other potential incentive programs to stimulate development of vacant lots and promote restoration and maintenance of heritage properties.
- Exploring the potential development of "large downtown attractions", such as an arena.

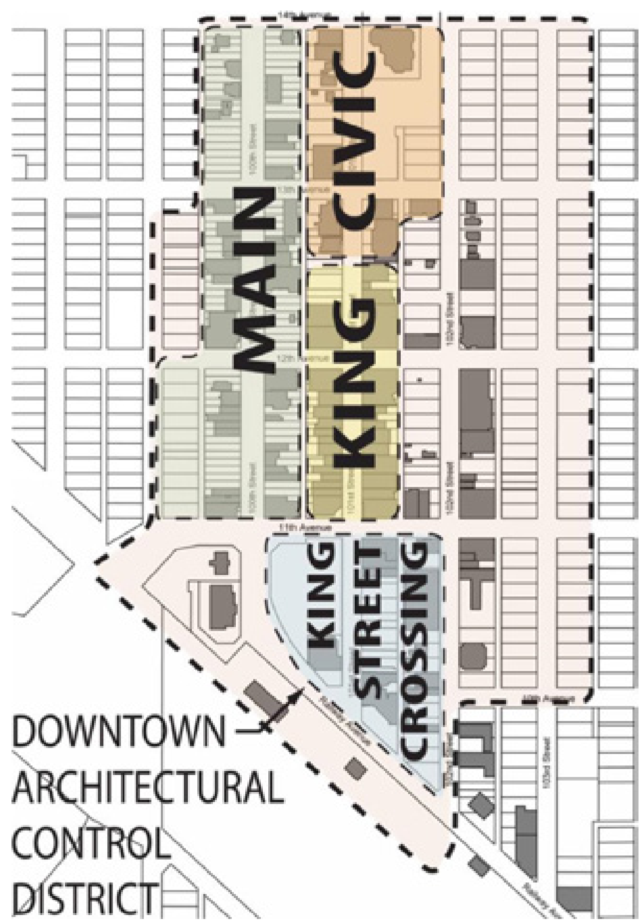


Figure 2.4: Downtown North Battleford character districts (Downtown Master Plan, p. 19)

- Use of a façade improvement grant to enhance street-fronting façades (currently administered by the North Battleford Downtown Business Improvement District [BID]).
- Reduction in parking requirements.
- Strategic planning for a farmer's market, educational institutions, and other features to promote activity and foot traffic.
- Development of new Downtown branding/ theming.
- Prioritizing foot traffic by promoting mixed-use development, supporting walkability, improving parking, enhancing public transit in the downtown area, encouraging cycling, improving road safety, and planting trees.
- Promoting Crime Prevention Through Environmental Design (CPTED).
- Investigating the potential for new downtown hubs for Indigenous business development, building on existing Indigenous business activity in the area.

Yellow Sky Master Plan

The Yellow Sky Master Plan (also known as the South East Quadrant Master Plan), developed in 2018, is a blueprint for the development of a "complete neighbourhood" in the southeastern area of North Battleford (including a portion of "Retail Cluster 3" identified later in this study). The master planning process was initiated by the City of North Battleford and carried out with the assistance of a private consultant.

The master plan area covers roughly 400 acres of land north of Highway 40 and Highway 16, and is bounded by Territorial Drive to the west. Existing land use is mainly Regional Commercial, including the Frontier Centre mall, but most of the area is undeveloped.

According to the OCP, future land uses include regional commercial and residential. The master plan aims to build on the district's existing status as a regional shopping destination, a function that benefits from the area's location at the crossroads of highways of regional and national significance.

The master plan sets aside the area around Carlton Trail, next to Territorial Drive and Highways 16/40, for Regional Commercial use, providing ample land for future expansion of the existing commercial cluster. This includes large areas of vacant land to the southeast of Walmart and the Frontier Centre. The northern portion of the Yellow Sky area, currently farmland, would be set aside for a residential area with a mix of housing typologies (including lower-density, medium-density, and multi-family buildings) and a neighbourhood commercial element.

The remainder of the master planning area is set aside for community uses including open spaces, the InnovationPlex multi-purpose recreation centre, a cemetery, and the grounds of the Agricultural Society.

The generous provision of additional Regional Commercial lands in this area is intended to help North Battleford reduce spending outflow to Saskatoon and Lloydminster by providing a greater variety of offerings locally as the local commercial sector expands.

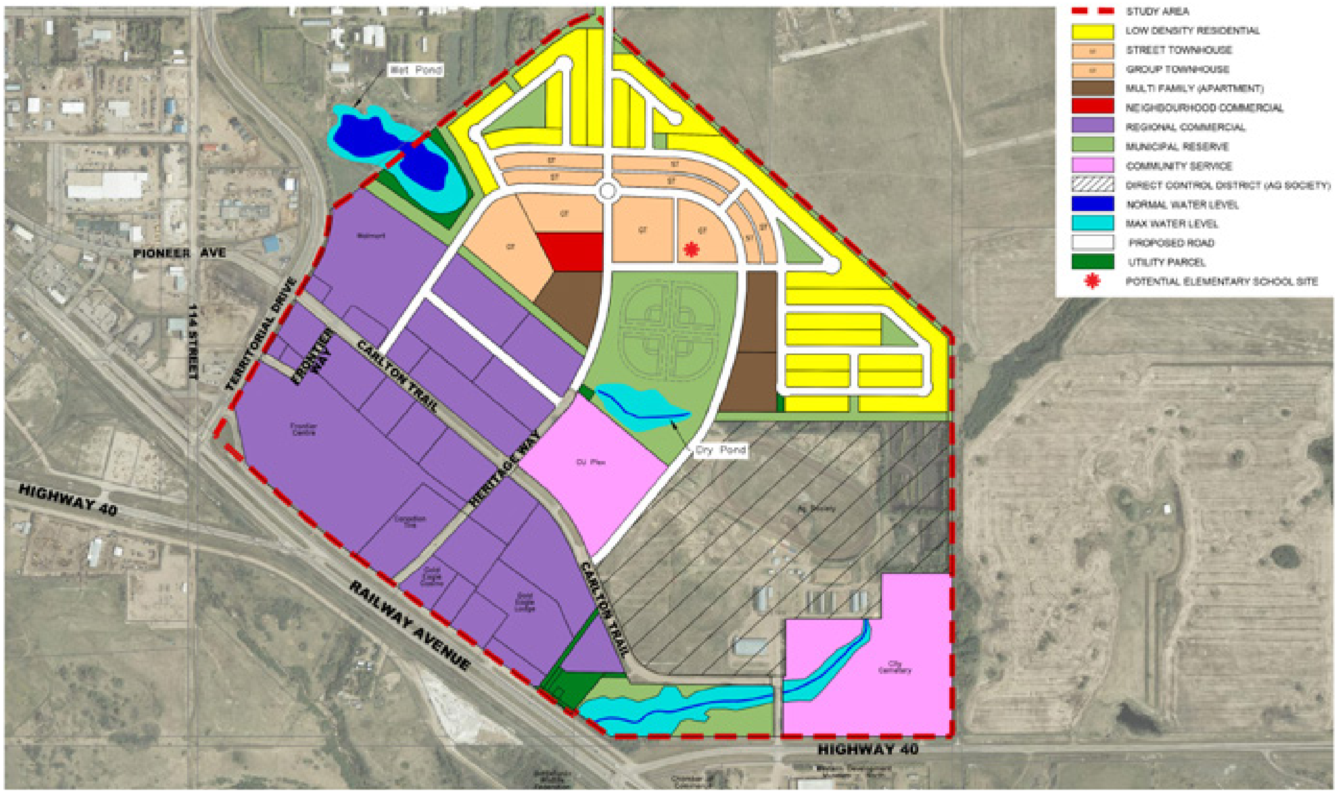


Figure 2.5: Land use master plan (Yellow Sky Master Plan, p. 15)

2.4 Transportation and traffic counts

Transportation infrastructure affects commercial retail demand in any given area. Understanding North Battleford's transportation attributes can assist us in creating the conditions necessary to attract and retain new businesses and residents.

The Battlefords are strategically located at the intersection of five highways including the Yellowhead Highway (part of the Trans-Canada).

Figure 2.6 presents the provincial traffic counts on major highways in the vicinity of the Battlefords as recorded in 2020 and 2023. The busiest road in the area is the Battlefords Bridge, a twinned highway bridge carrying all highway traffic over the North Saskatchewan River, which recorded annual average daily traffic (AADT) of 21,400 vehicles in 2023, an increase over the 19,190 AADT recorded in 2020.

Highway 4, the primary north-south corridor that passes through both Battlefords and the City of North Battleford, was more heavily travelled north of the city (7,600 AADT in 2023) than the portion south of the Town of Battleford (2,550 AADT in 2023), helping to support a linear cluster of arterial and regional retail in the City's north end. The Yellowhead Highway and Highway 40, which together see an AADT approaching 10,000, help support a cluster of arterial and regional retail in the south-east of the city, an area that has ample room for future commercial growth.

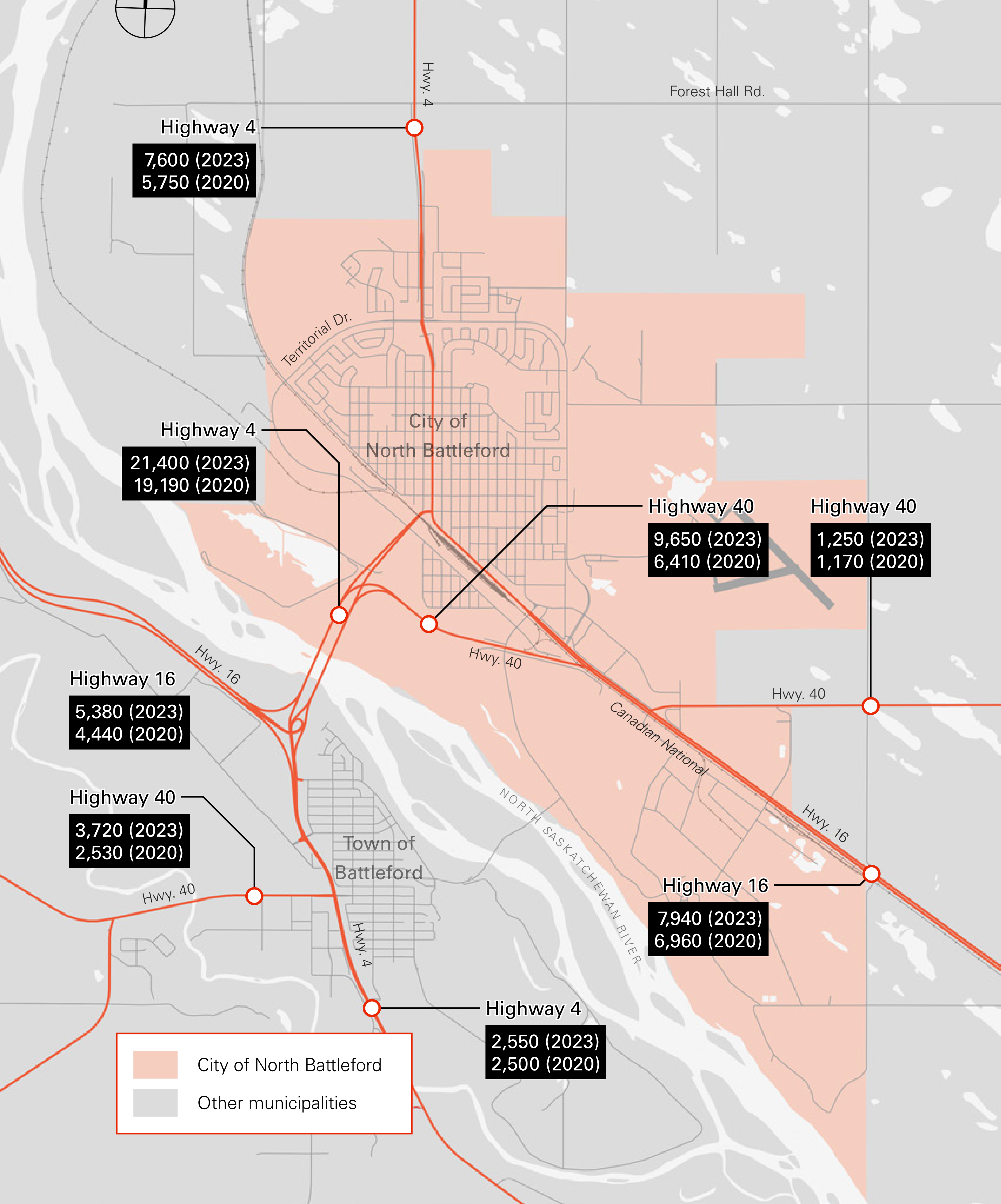
Future transportation plans are outlined in the City of North Battleford's Transportation Master Plan (TMP), drawn up in 2017 in partnership with the provincial government. The TMP was intended to guide transportation planning and development until the region reaches a population of 25,000, which was estimated to occur around 2038. However this target has already been exceeded as of 2024. The TMP notes that regional travel into North Battleford is concentrated in three approaches: "Highways 16 and 40 join to enter from the southeast; Highways 16, 4, 40 and 29 converge on the river crossing to enter from the south; and Highway 4 enters from the north". North Battleford's main commercial districts, outlined in Section 4, are strategically located to capture spending at these entry points.

Figure 14 in the TMP shows a variety of conceptual roadway network extensions which are too numerous to summarize exhaustively here. One notable proposal is to upgrade Highway 16 within the City of North Battleford to grade-separated, twinned expressway standard, with three highway interchanges at Hereford Street, Railway Avenue, and Battleford Road. A portion of Highway 40 would potentially be realigned to intersect Highway 16 at the new Hereford Road interchange. Under the OCP, land in this area is designated for potential Regional Commercial use.

The City of North Battleford operates a public transit service within the city. Accessible transit services are also provided in the region, funded in part by the City of North Battleford.

The city is served by the Canadian National Railway. However, no passenger service currently operates and so the railway is not considered to factor into retail demand.

Figure 2.6: Traffic counts (AADT), 2020 and 2023



North Battleford - a closer look

- *trade area population of 21,471*
- *total trade area spending estimated at $668 million on retail goods & services annually*
- *top trade area retail spending segments include:*
    1. *Grocery & Convenience: $115.5 million*
    2. *Home Improvement & Garden: $45.5 million*
    3. *Restaurants & Pubs: $38.9 million*
    4. *Fashion & Accessories: $31.2 million*
    5. *Quick Service F&B: $29.1 million*
- *miscellaneous "inflow" spending beyond regular trade area estimated at $34 million annually.*
- *67% of Canadian consumers report buying products online at least once a month.*

3.0
trade area & trends

3.0 Trade area & trends

3.1 Introduction

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

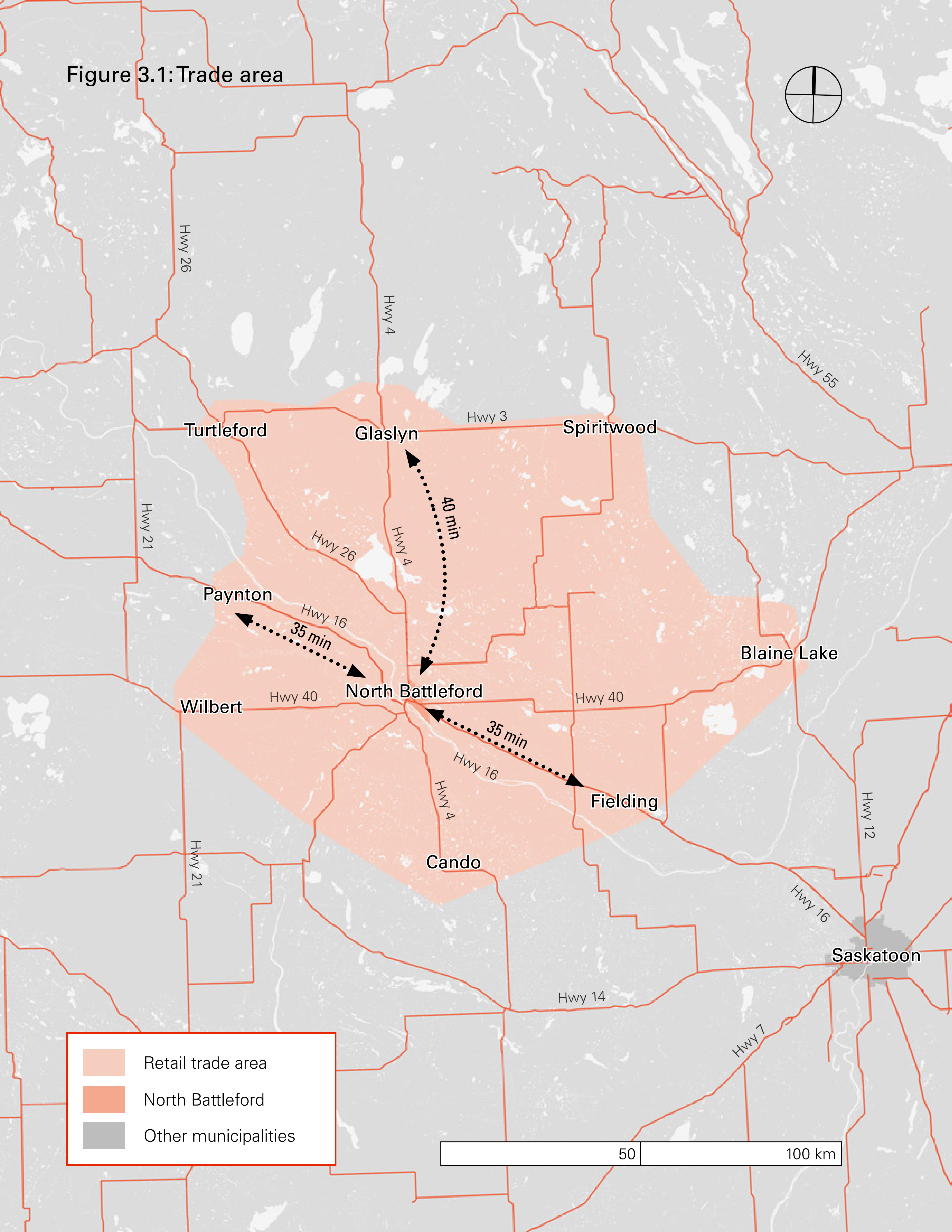
Identification of the trade area is important for understanding the total market potential available to current and future retailers. The local and regional residential population has particular demographic characteristics and spending habits that provide insight as to the types of retail tenants that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

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

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

For this particular study, the retail trade area (**Figure 3.1**) was particularly influenced by a combination of drive times and competitive forces. According to the Official Community Plan, the City of North Battleford focuses on attracting residents within a 40-minute drive of the city. This is roughly reflected in the trade area illustrated here, which includes hamlets, villages, and towns ranging from 35 minutes away (Cando, Fielding, Paynton) to as far as 80 minutes away (Spiritwood). The trade area is defined more conservatively to the south reflecting the strong competitive influence of Saskatoon and the layout of the highway network, which is influenced by the natural barrier of the North Saskatchewan River.

Figure 3.1: Trade area



3.2 Population and projections

The most recent Statistics Canada Census release (2021) as well as information from Manifold Data Mining Inc (2024/25), a leading supplier of demographic and consumer expenditure information, were used to tabulate population estimates and growth forecasts for the identified Trade Areas. These forecasts represent a snapshot based on demographic models and do not account for future planning realities that may influence population growth.

Population (Table 3.1): As mentioned above, the 2021 Canadian census recorded a population of 19,374 for the North Battleford census agglomeration, which includes the neighbouring Town of Battleford. The trade area population for 2024/25 is estimated to be 41,171. Growth forecasts for the next decade suggest that the trade area population could increase to 42,957 (at an annual growth rate of 0.40%).

Age (Table 3.1, Figure 3.2 and Appendix Table 2): The trade area has a median age of 41.3, higher than the provincial median of 38.8. The proportion of seniors (aged 65 and over) is higher within the trade area (21.34%) than in the province of Saskatchewan as a whole (17.95%).

Educational attainment (Table 3.1): Of those over the age of 15 within the trade area, 44.24% hold a post-secondary certificate, diploma, or degree, which is slightly lower than the provincial benchmark of 50.01%.

Household income (Table 3.1, Figure 3.3 and Appendix Table 1): The median household income in the trade area is $82,591, slightly below the provincial median household income of $91,870.

For each of the trade area tables presented in this section, a colour-coded indexing is provided to show how the trade area and North Battleford **Census Metropolitan Area (CMA**) relates to the provincial average.

CanaCode Lifestyle Clusters

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

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

The dominant CanaCode Lifestyle Cluster in the North Battleford trade area is "J: Joyful Country", accounting for 28.28% of trade area households (**Table 3.2**).

While factors such as house values and activities can vary depending on economic and geographic contexts, these descriptions offer a general sense of consumers' spending habits and lifestyle in the trade area.

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

Figure 3.2: Population by age group (North Battleford trade area)

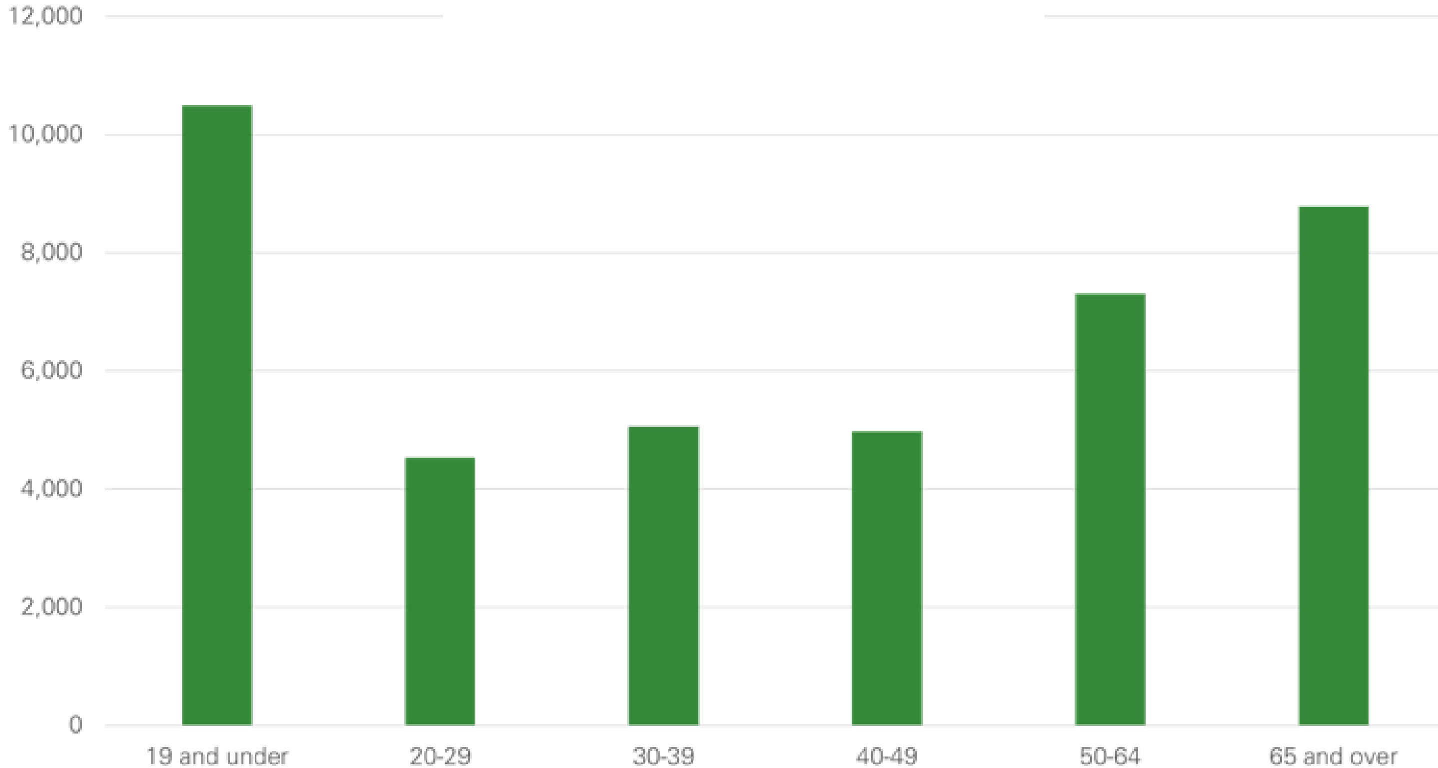


Figure 3.3: Households by income level (North Battleford trade area)

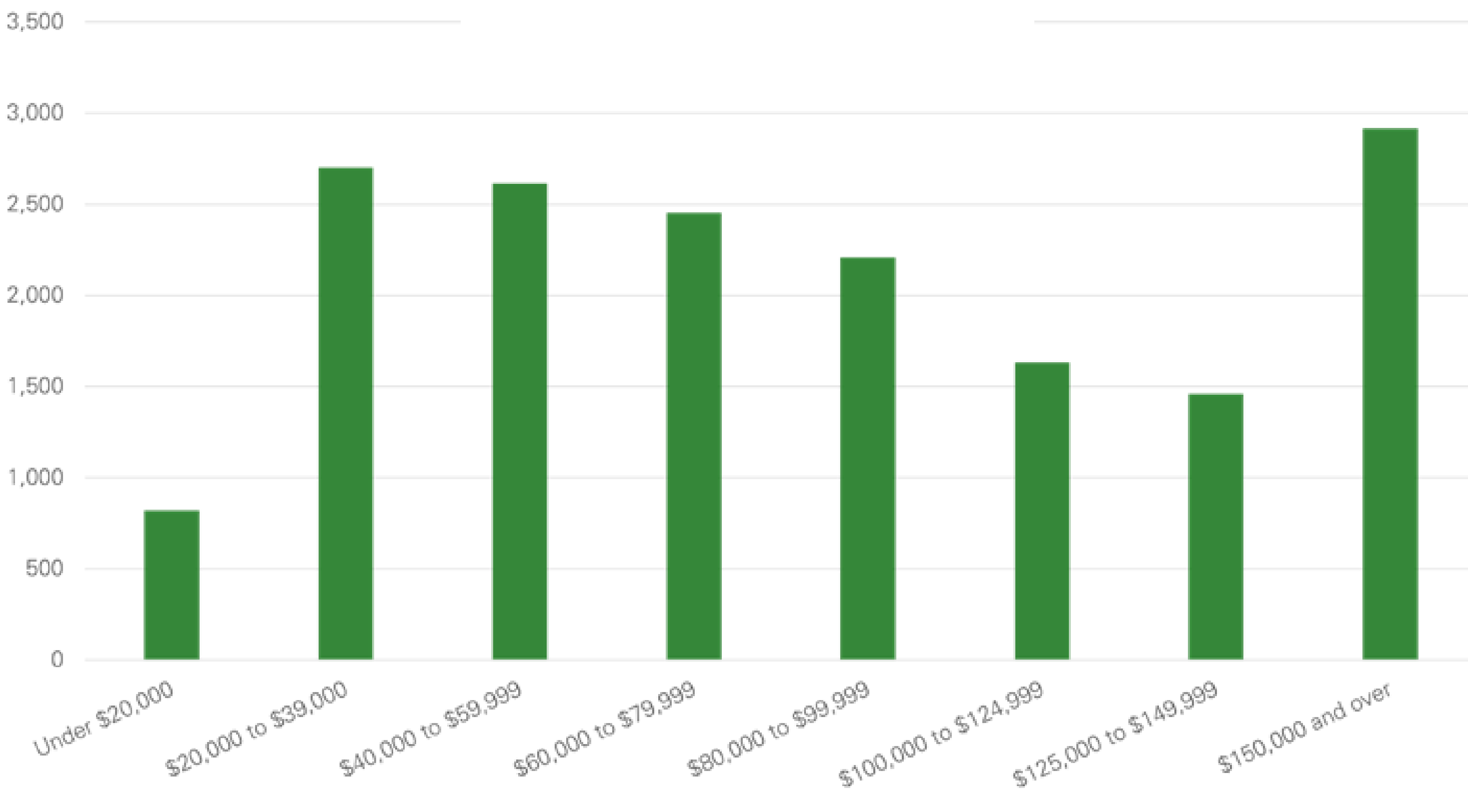


Table 3.1: Trade area summary table

Attribute	Benchmark: SK		North Battleford CMA			Trade area		
	Value	Percent	Value	Percent	Index	Value	Percent	Index
Summary								
Total population	1,256,541		20,736			41,171		
Total population age 15 and over	1,021,118		16,782			33,394		
Total number of private households	498,669		8,436			16,801		
Average number of persons in private households	2.45		2.38		97	2.39		98
Population age								
Population age 0-14	235,423	18.74%	3,953	19.06%	102	7,777	18.89%	101
Population age 15-24	159,595	12.70%	2,656	12.81%	101	5,029	12.21%	96
Population age 25-34	162,315	12.92%	2,485	11.98%	93	4,575	11.11%	86
Population age 35-44	182,967	14.56%	2,901	13.99%	96	5,360	13.02%	89
Population age 45-54	144,893	11.53%	2,307	11.13%	97	4,484	10.89%	94
Population age 55-64	145,797	11.60%	2,319	11.18%	96	5,158	12.53%	108
Population age 65+	225,551	17.95%	4,114	19.84%	111	8,788	21.34%	119
Education								
Total population aged 15 years and over by highest certificate, diploma, or degree	1,021,033		16,791			33,384		
No certificate, diploma, or degree	182,521	17.88%	3,471	20.67%	116	7,842	23.49%	131
High school diploma or equivalent	327,926	32.12%	5,278	31.43%	98	10,772	32.27%	100
Post-secondary certificate, diploma, or degree	510,587	50.01%	8,043	47.90%	96	14,770	44.24%	88
Postsecondary certificate or diploma below bachelor level	296,793	29.07%	5,250	31.27%	108	10,236	30.66%	105
Apprenticeship or trades certificate or diploma	97,153	9.52%	1,652	9.84%	103	3,323	9.95%	105
College, CEGEP or other non-university certificate or diploma	166,464	16.30%	3,020	17.99%	110	5,776	17.30%	106
University certificate or diploma below bachelor level	33,176	3.25%	578	3.44%	106	1,137	3.40%	105
University certificate, diploma, or degree at bachelor level or above	213,794	20.94%	2,793	16.63%	79	4,534	13.58%	65
Bachelor's degree	154,896	15.17%	2,135	12.72%	84	3,655	10.95%	72

(Table continues on following page)

Indexing Legend for Demographic Tables

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

Table 3.1: Trade area summary table (continued)

Attribute	Benchmark: SK		North Battleford CMA			Trade area		
	Value	Percent	Value	Percent	Index	Value	Percent	Index
Projections								
Annual population growth in the period: Next 3 years		0.92%		-0.05%	-5		0.39%	42
Annual household growth in the period: Next 3 years		1.13%		0.11%	10		0.72%	64
Annual population growth in the period: Next 5 years		0.92%		-0.05%	-5		0.44%	48
Annual household growth in the period: Next 5 years		1.12%		0.11%	10		0.76%	68
Annual population growth in the period: 5 to 10 years from current year		0.83%		-0.05%	-6		0.40%	48
Annual household growth in the period: 5 to 10 years from current year		0.98%		0.10%	10		0.69%	70
Population growth								
Current year total population	1,256,541		20,736			41,171		
3-Year Projections - Total population	1,291,466		20,703			41,660		
5-Year Projections - Total population	1,315,287		20,682			42,100		
10-Year Projections - Total population	1,370,502		20,635			42,957		
Household income growth								
Current year average household income	$112,060.00		$100,069.00		89	$96,442.00		86
3-Year Projections - Average household income	$120,844.00		$97,860.00		81	$102,831.00		85
5-Year Projections - Average household income	$133,322.00		$107,734.00		81	$111,989.00		84
10-Year Projections - Average household income	$153,549.00		$123,122.00		80	$125,445.00		82

Indexing Legend for Demographic Tables

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

Table 3.2: Trade area CanaCode Lifestyle Clusters

Attribute	Benchmark: SK		North Battleford CMA			Trade area		
	Value	Percent	Value	Percent	Index	Value	Percent	Index
A: AFFLUENTS	7,238	1.41%	0	0.00%	0	0	0.00%	0
B: ELITE PROFESSIONALS	29,404	5.74%	0	0.00%	0	31	0.18%	3
C: ETHNIC CRUISERS	6,579	1.29%	0	0.00%	0	0	0.00%	0
D: NEST BUILDERS	32,158	6.28%	812	11.91%	190	812	4.83%	77
E: BUY ME A NEW HOME	39,318	7.68%	32	0.47%	6	32	0.19%	2
F: EMPTY NESTERS	25,352	4.95%	60	0.88%	18	1,312	7.81%	158
G: UP THE LADDER	67,487	13.18%	2,578	37.84%	287	2,602	15.49%	118
H: HIGH TRADES	12,903	2.52%	451	6.62%	263	451	2.69%	107
I: URBAN LIFE IN SMALL TOWNS	73,842	14.42%	12	0.17%	1	1,808	10.76%	75
J: JOYFUL COUNTRY	61,223	11.96%	1	0.02%	0	4,751	28.28%	236
K: RURAL HANDYMEN	45,623	8.91%	0	0.00%	0	2,137	12.72%	143
L: COMFORTABLE APARTMENT DWELLERS	48,797	9.53%	905	13.28%	139	905	5.39%	57
M: SINGLES	14,232	2.78%	343	5.04%	181	343	2.04%	73
N: NEW CANADIANS	17,932	3.50%	692	10.16%	290	692	4.12%	118
O: RENTERS	5,190	1.01%	282	4.15%	411	282	1.68%	166
P: ONE PARENT FAMILIES	14,261	2.79%	374	5.49%	197	374	2.23%	80
Q: THRIFTY	10,528	2.06%	270	3.96%	192	270	1.61%	78

Indexing Legend for Demographic Tables

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

Trade area top CanaCode Lifestyle Clusters overview

Cluster J: "Joyful Country"

Accounting for 28.28% of the trade area households, compared with 5.7% nationally, the population in this Lifestyle Cluster includes rural households that spend more than the Canadian average on their homes, gardening, recreation vehicles, boats, motorcycles, gasoline and fuel, medicine, and bingo.

Many in this Joyful Country lifestyle segment work in rural industries such as natural resources, agriculture, trades, transportation, and heavy equipment operations, and they hunt and fish more than average. Their shopping preferences include everyday retailers such as Giant Tiger, as well as online shopping.

Cluster

J Joyful Country

5.7% of Canadian households

AVERAGE HH INCOME
$ 117 K
Average Home Value
$608,475

AGE
55-64

VEHICLE
Chevrolet, Ford, Dodge, GMC, like SUVs and Pick-up trucks

FAVOURITE COFFEE SHOP
Tim Hortons, McCafé, Country Style

FAVOURITE SOCIAL MEDIA
Pinterest

ACTIVE IN: Snowmobiling, fishing, hunting, cross country skiing, power boating

PSYCHOGRAPHICS/HEALTH CONCERNS: Adventurous/outdoorsy, less social life, family oriented

SPEND MONEY ON: Giant Tiger, online shopping, Co-op, No Frills, MAXI, IGA/Foodland

INVEST WITH: Credit Union, Mutual Fund

Cluster

G Up the Ladder

14.65% of Canadian households

AVERAGE HH INCOME
$ 109 K
Average Home Value
$634,349

AGE
35-44

VEHICLE
Toyota, Ford, Kia

FAVOURITE COFFEE SHOP
Tim Hortons

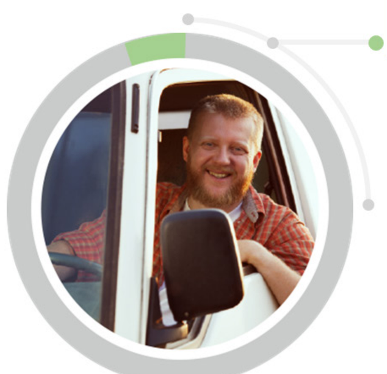
FAVOURITE SOCIAL MEDIA
Reddit, Pinterest, Snapchat

ACTIVE IN: Snowboarding, ski camping, hiking, fishing/hunting

PSYCHOGRAPHICS/HEALTH CONCERNS: Busy social life and entertainment, friends' opinion is important

SPEND MONEY ON: Atmosphere, Sports Experts, Provigo, No Frills, online shopping

INVEST WITH: Credit Union, Mutual Fund, Insurance Co



Cluster

K Rural Handymen

4.33% of Canadian households

AVERAGE HH INCOME
$ 92 K
Average Home Value
$415,756

AGE
55-64

VEHICLE
Chevrolet, Ford, Dodge, GMC, Toyota, like SUVs and Pick-up trucks

FAVOURITE COFFEE SHOP
Tim Hortons, Tea Stores

FAVOURITE SOCIAL MEDIA
Pinterest, Facebook

ACTIVE IN: Snowmobiling, fishing/hunting, cross country skiing, power boating , curling

PSYCHOGRAPHICS/HEALTH CONCERNS: Low-calorie food, busy social life, adventurous/outdoorsy, family oriented

SPEND MONEY ON: Giant Tiger, Atmosphere, Sports Experts, online shopping, IGA/Foodland

INVEST WITH: Credit Union, Mutual Fund, Insurance Co

3.3 Summary of employment and labour

Appendix Tables 3 and 4 provide a summary of the estimated 2023/24 labour force profile for North Battleford's retail trade area compared to the province of Saskatchewan as a whole. The trade area has a total labour force of 21,463, of which 20,182 are employed while 1,281 are unemployed. The unemployment rate is slightly higher (5.9%) than the provincial rate (5.3%). The North Battleford trade area has a somewhat higher proportion of workers who are self-employed (18.4%) compared to 16.0% province-wide.

Within the trade area, motor vehicles are the primary mode of transportation among commuters. Public transit use is low (0.2%) compared to the provincial rate (1.5%), reflecting the low availability of public transit in most of the trade area. However, commuting by walking is slightly higher in the trade area (5.0%) compared to the province (4.0%), reflecting the walkability of the trade area.

Within the total labour force, 54% commute less than 15 minutes, reflecting a higher proportion of short commutes compared to the provincewide rate (40.6%). Another 18.4% commute 15 to 29 minutes.

Referring to **Appendix Tables 3 and 4**, the most prominent industry within the trade area is Health Care and Social Service Providers, accounting for 18.9% of the labour force (or 4,075 workers). It is closely followed by Agriculture, Forestry, Fishing, and Hunting (16.9%, or 3,435 workers) and the Retail Trade (10.6%, or 2,279 workers). The concentration of Health Care and Social Service Providers is higher in the trade area than the provincial average (18.9% vs 14.6%), reflecting the presence of the Saskatchewan Hospital and other health care centres. The share of Education is also higher in the trade area at an index of 113 to the provincial average. The proportion of Agriculture, Forestry, Fishing, and Hunting workers is similarly higher than the provincial rate (16.0% vs 9.1%). The proportion of workers employed in the retail industry is similar to the provincial rate (10.6% vs 11.0%).

By occupation, a significant proportion of the trade area's labour force is employed in the following categories:

- Sales and service occupations (24.5%, 5,271 workers), and
- Trades, transport and equipment operators and related occupations (18.3%, 3,947 workers).

Employment in both of these occupations is comparable to the provincial average. The proportion working in the next highest category, "natural resources, agriculture, and related production occupations" (15%, 3,231 workers), is higher in the trade area than in the province (9.6%).

3.4 Retail spending profile

Detailed information regarding retail spending within each Trade Area was collected from Manifold Data Mining Inc., a leading supplier of demographic and consumer expenditure information, using 2024/2025 data. The data was further consolidated into 22 specific spending categories in order to build a spending profile for the Trade Area.

These spending categories, as shown in **Tables 3.3 to 3.5** include:

- Grocery & Specialty Foods
- Pharmacy
- Alcohol (Off-Premise)
- Tobacco & Cannabis
- Personal Services
- *Health Care & Medical Services**
- Fashion & Accessories
- Jewelry
- Beauty & Personal Care
- Home Furniture & Decor
- Appliances & Electronics
- Home Improvement and Gardening
- Books & Media
- Sporting Goods
- Toys & Hobbies
- Specialty Retail
- Quick Service F&B
- Restaurants & Pubs
- Arts & Entertainment
- Fitness & Leisure
- Auto Parts and Accessories
- Auto / RV / Motorsports Dealership
- *Auto Fuel**

Having established the respective Trade Area boundaries, population, and demographic profile, the size of the retail market and its anticipated growth was projected using the retail spending data.

The task involved developing an understanding of how the Trade Area residents spend their shopping and leisure dollars on a household basis for each of the 22 categories. **Tables 3.3 and 3.4, and Figure 3.3,** illustrate a spending profile for North Battleford's core trade area. Additional miscellaneous inflow is also presented in **Table 3.5,** showing estimated spending by visitors and irregular shopping occurances.

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

Table 3.3: Trade Area Retail Spending 2024

	Retail Spending by Merchandise Category	2024 NORTH BATTLEFORD CMA Per Household Retail Spending	2024 NORTH BATTLEFORD CMA Aggregate Retail Spending	2024 NORTH BATTLEFORD TRADE AREA Per Household Retail Spending	2024 NORTH BATTLEFORD TRADE AREA Aggregate Retail Spending
Convenience & Day-to-Day Goods/Services	Grocery & Convenience	$7,314	$61,683,206	$6,877	$115,532,447
	Pharmacy	$1,771	$14,935,501	$1,692	$28,435,026
	Alcohol (off-premise)	$401	$3,382,793	$381	$6,403,130
	Tobacco & Cannabis	$256	$2,160,369	$222	$3,737,798
	Personal Services	$1,519	$12,814,038	$1,332	$22,375,358
	Health Care & Medical Services	$1,838	$15,498,175	$1,928	$32,394,441
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	$2,109	$17,787,348	$1,857	$31,201,201
	Jewelry	$174	$1,468,334	$153	$2,572,772
	Beauty & Personal Care	$805	$6,789,370	$725	$12,180,725
	Home Furniture & Décor	$1,250	$10,543,521	$1,198	$20,119,708
	Appliances & Electronics	$1,294	$10,915,342	$1,184	$19,888,565
	Home Improvement & Gardening	$2,857	$24,093,905	$2,711	$45,541,368
	Books & Media	$1,192	$10,053,868	$940	$15,792,982
	Sporting Goods	$348	$2,938,262	$277	$4,648,763
	Toys & Hobbies	$62	$525,624	$61	$1,030,245
	Specialty Retail	$1,332	$11,238,103	$1,252	$21,032,116
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	$1,837	$15,495,906	$1,730	$29,070,711
	Restaurants & Pubs	$2,616	$22,064,618	$2,313	$38,853,440
	Arts & Entertainment	$558	$4,705,700	$517	$8,679,852
	Fitness & Leisure	$415	$3,498,642	$388	$6,520,495
Automotive Goods (excluding repair)	Auto Parts & Accessories	$1,635	$13,785,643	$1,534	$25,768,462
	Auto/RV/Motorsports Dealership	$4,965	$41,872,685	$5,064	$85,088,159
	Auto Fuel	$5,513	$46,495,832	$5,409	$90,884,589
	TOTAL CATEGORIES	**$42,062**	**$354,746,784**	**$39,745**	**$667,752,353**
	TOTAL (excluding Health Care & Auto)	**$28,112**	**$237,094,449**	**$25,809**	**$433,616,701**

Table 3.4: Trade Area Retail Spending 2034

		2034		2034	
	Retail Spending by Merchandise Category	**NORTH BATTLEFORD CMA Per Household Retail Spending**	**NORTH BATTLEFORD CMA Aggregate Retail Spending**	**NORTH BATTLEFORD TRADE AREA Per Household Retail Spending**	**NORTH BATTLEFORD TRADE AREA Aggregate Retail Spending**
Convenience & Day-to-Day Goods/Services	Grocery & Convenience	$8,079	$68,855,648	$7,596	$137,319,736
	Pharmacy	$1,956	$16,672,181	$1,870	$33,797,347
	Alcohol (off-premise)	$443	$3,776,140	$421	$7,610,642
	Tobacco & Cannabis	$283	$2,411,574	$246	$4,442,678
	Personal Services	$1,678	$14,304,037	$1,471	$26,594,938
	Health Care & Medical Services	$2,030	$17,300,282	$2,130	$38,503,436
			$0		
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	$2,330	$19,855,638	$2,051	$37,085,172
	Jewelry	$192	$1,639,070	$169	$3,057,949
	Beauty & Personal Care	$889	$7,578,829	$801	$14,477,785
	Home Furniture & Décor	$1,381	$11,769,507	$1,323	$23,913,913
	Appliances & Electronics	$1,430	$12,184,563	$1,308	$23,639,182
	Home Improvement & Gardening	$3,156	$26,895,513	$2,994	$54,129,630
	Books & Media	$1,317	$11,222,918	$1,038	$18,771,248
	Sporting Goods	$385	$3,279,919	$306	$5,525,435
	Toys & Hobbies	$69	$586,743	$68	$1,224,530
	Specialty Retail	$1,472	$12,544,854	$1,383	$24,998,386
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	$2,030	$17,297,750	$1,911	$34,552,911
	Restaurants & Pubs	$2,890	$24,630,262	$2,555	$46,180,482
	Arts & Entertainment	$616	$5,252,872	$571	$10,316,712
	Fitness & Leisure	$458	$3,905,460	$429	$7,750,140
Automotive Goods (excluding repair)	Auto Parts & Accessories	$1,806	$15,388,619	$1,694	$30,627,919
	Auto/RV/Motorsports Dealership	$5,484	$46,741,585	$5,594	$101,134,217
	Auto Fuel	$6,090	$51,902,306	$5,975	$108,023,747
	TOTAL CATEGORIES	**$46,462**	**$395,996,271**	**$43,903**	**$793,678,133**
	TOTAL (excluding Health Care & Auto)	**$31,053**	**$264,663,478**	**$28,509**	**$515,388,815**

Table 3.5: Trade Area Retail Spending - Miscellaneous Inflow

Miscellaneous Inflow Factor		Retail Spending by Merchandise Category	2024 NORTH BATTLEFORD Misc Inflow Spending	2034 NORTH BATTLEFORD Misc Inflow Spending
Convenience & Day-to-Day Goods/Services	10.0%	Grocery & Convenience	$11,553,245	$14,432,442
	10.0%	Pharmacy	$2,843,503	$3,552,135
	10.0%	Alcohol (off-premise)	$640,313	$799,886
	10.0%	Tobacco & Cannabis	$373,780	$466,930
	10.0%	Personal Services	$2,237,536	$2,795,155
	0.0%	Health Care & Medical Services		
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	2.5%	Fashion & Accessories	$780,030	$974,422
	0.5%	Jewelry	$12,864	$16,070
	2.5%	Beauty & Personal Care	$304,518	$380,407
	5.0%	Home Furniture & Décor	$1,005,985	$1,256,688
	5.0%	Appliances & Electronics	$994,428	$1,242,251
	5.0%	Home Improvement & Gardening	$2,277,068	$2,844,539
	0.0%	Books & Media	$0	$0
	2.5%	Sporting Goods	$116,219	$145,182
	2.5%	Toys & Hobbies	$25,756	$32,175
	5.0%	Specialty Retail	$1,051,606	$1,313,678
Leisure, Recreation & Entertainment Goods/Services	10.0%	Quick Service F&B	$2,907,071	$3,631,546
	2.5%	Restaurants & Pubs	$971,336	$1,213,404
	2.5%	Arts & Entertainment	$216,996	$271,074
	0.0%	Fitness & Leisure	$0	$0
Automotive Goods (excluding repair)	2.5%	Auto Parts & Accessories	$644,212	$804,756
	5.0%	Auto/RV/Motorsports Dealership	$4,254,408	$5,314,654
	2.5%	Auto Fuel	$2,272,115	$2,838,351
	5.3%	**TOTAL RETAIL CATEGORIES ONLY**	**$35,482,989**	**$44,325,745**
		TOTAL (excluding Health Care & Auto)	**$28,312,254**	**$35,367,984**

Total Trade Area (including City of North Battleford)

Referring to **Table 3.3**, total retail spending in North Battleford's trade area is estimated at $667.8 million for 2024. This includes spending across a wide variety of retail categories, ranging from grocery to automotive. When excluding health care services and automotive categories (which includes fuel, parts, and vehicles), the total spending amounts to $433.6 million.

Excluding auto categories, the top annual retail spending segments include:

Grocery & Convenience: $115.5 million

Home Improvement & Garden: $45.5 million

Restaurants & Pubs: $38.9 million

Fashion & Accessories: $31.2 million

Quick Service F&B: $29.1 million

Miscellaneous Spending Inflow

Since much of North Battleford's trading region is captured in its core trade area, beyond which are the larger markets of Lloydminster and Saskatoon, miscellaneous inflow spending still accounts for a percentage (5%) of overall Trade Area retail spending.

In broad terms, miscellaneous inflow is derived from passing motorists, visitors, or infrequent residents from outside of the normal, everyday trading region for North Battleford.

Categories where estimated miscellaneous inflow spending is likely to be applicable include Grocery & Convenience, Pharmacy, and Quick Service F&B, as well as home furnishings - of which North Battleford has an above average offering in terms of choice. Entertainment is also a draw given the presence of the Capitol Cinema as well as the Gold Eagle Casino.

Nonetheless, total retail miscellaneous inflow spending for 2024 is estimated at a not inconsequential figure of $35 million and is expected to increase to $44 million by 2034.

3.5 Canadian consumer e-commerce trends

This overview explores the evolving trends in retail and e-commerce that are shaping consumer behaviour and store location preferences. It provides an overview of the key shifts in consumer expectations, purchasing patterns, and retail strategies. The trends highlight the growing significance of e-commerce, the demand for personalized shopping experiences, and the influence of location-based retail strategies in driving consumer engagement and sales.

Value and Convenience

Canadians are increasingly looking for value, convenience, and speed. This is reflected and validated in several consumer behaviour trends.

Canadian consumers are more price-sensitive due to factors like inflation and the rising cost of living. According to a 2023 Ipsos survey, 43% of Canadian shoppers said they prioritize discounts and promotions when making purchasing decisions.

A desire for convenience and time-saving options has driven the popularity of curbside pick-up and delivery services.

About 30% of Canadian consumers prefer same-day or next-day delivery, and this expectation is more difficult to meet the further a community may be from the major distribution centre, which for North Battleford, is Saskatoon.

Sustainability and Ethical Consumption

Demand is growing for sustainable and ethically sourced products, although the consumer survey in this study did not seem to indicate a strong sentiment toward sustainable and ethical consumption.

A joint study in February 2023 by McKinsey and Nielsen IQ titled "Consumers care about sustainability – and back it up with their wallets" found that 73% of Canadian consumers are willing to pay more for sustainable products, with a particular interest in reducing carbon footprints. In general, this aligns with a growing awareness of environmental issues, especially among millennials and Gen Z consumers.

58% of Canadians prefer brands that are accountable and prioritize social and environmental responsibility, and this trend is gaining momentum, where local sourcing and sustainability are increasingly important to consumers. A retailer such as Uniqlo is at the leading edge of promoting their sustainability benefits.

Importance of Experience-Based Retail

Experience-driven shopping is a growing trend in the major urban markets but has yet to find its way to North Battleford. However, the opportunity to accommodate consumers who are not just looking for products, but rather, seeking experiences, was noted by consumer survey respondents as an important element to attracting them to the downtown.

Prominent national retailers are adapting to this trend by integrating experiential elements such as interactive displays, in-store events, and live demonstrations.

Pop-up retail or temporary stores in locations like the Frontier Centre or Discovery Co-op Mall, continue to be attractive locations for incubating local retailers or for larger retailers to test a respective market. This trend allows retailers to leverage short-term leases to test new markets or capitalize on seasonal trends.

Impact of Demographics on Retail Trends

As tech-savvy shoppers, 58% of millennial and Gen Z consumers shop online at least once a week. Further, they prioritize convenience, digital interfaces, and brands that reflect their values — especially sustainability and inclusivity.

Social media, particularly Instagram and TikTok, plays a pivotal role in influencing purchase decisions, hence the emergence of the "influencers". A 2023 survey found that 42% of consumers aged 18-34 make purchases directly through social media platforms.

In general, retail is undergoing a transformation driven by a combination of technological innovation, social media, shifting consumer preferences, and changing demographic dynamics.

Key trends such as the continuing rise of e-commerce, demand for omni-channel experiences, and a focus on sustainability are shaping the future of retail for which the following factors are paramount considerations for retailers and developers.

Enhancing Omni-channel Strategies: Retailers should focus on creating seamless shopping experiences that blend digital and physical touch points, offering features like "Buy Online Pick Up In Store" (BOPIS) and personalized online recommendations.

Investing in Sustainability: Emphasize sustainable products and practices to appeal to the eco-conscious consumer, particularly targeting millennials and Gen Z.

Leveraging Location-Based Marketing: Retailers should use geographic data to optimize store locations, focusing on areas with high foot traffic and convenient access to public transport or major highways.

Offering Personalized Experiences: Given the demand for tailored experiences, invest in data analytics to better understand customer preferences and offer individualized marketing strategies.

By aligning with these trends, businesses in North Battleford could gain a competitive edge and strengthen their market share and positioning, meeting the expectations of modern consumers while capitalizing on new growth opportunities.

The Rise of E-commerce

E-commerce continues to dominate Canadian retail, with a robust upward trajectory. The COVID-19 pandemic accelerated digital shopping habits, and many of these shifts are expected to persist, even though some of the rapid rates of on-line growth have come back to normal trajectories. A market like North Battleford likely has strong patterns of online shopping given the nature of drive times to desirable urban markets and/or lack of targeted retailers.

According to Statistics Canada, online retail sales accounted for 14.1% of total retail trade in 2022, up from 11.5% in 2020. This percentage is forecast to grow steadily as Canadians become more accustomed to online shopping as part of their day-to-day social media activities.

Canadians are increasingly opting for online shopping, with 67% of Canadian consumers reporting that they buy products online at least once a month. This preference is most prominent in major urban areas like Toronto, Vancouver, and Calgary.

Omni-channel Shopping

Consumers in Canada are adopting an omni-channel shopping approach, combining online research with in-store purchases, sometimes referred to as "showrooming". The integration of digital and physical experiences is reshaping how retailers operate.

A 2023 report by McKinsey titled "The State of Fashion 2023" noted that 50% of Canadians engage with retailers through multiple channels before making a purchase. This includes using smartphones to compare prices, read reviews, or check stock availability before going to a brick-and-mortar store.

The popularity of "buy online, pick up in store" (BOPIS) has surged, with 47% of Canadian shoppers indicating that they have used this service in the last year.

Growth in E-Commerce Among Canadians

The number of e-commerce users in Canada has risen steadily over the past 5 years, from 16.4 million digital buyers in 2020 to 25.16 million buyers in 2024[1]. Statista predicts continued growth in the number of e-commerce users, projecting 32.95 million users by 2029.

1 Statista. 2024. Number of users of e-commerce in Canada from 2020 to 2029. https://www.statista.com/forecasts/245143/canada-number-of-online-buyers

Online shopping using a mobile device – called mobile commerce or m-commerce - is on the rise as well[2].

The total annual retail sales in Canada from the beginning of October 2023 until the end of September 2024, according to Statistics Canada, is $795.99 billion, using the most recent unadjusted data available[3]. E-commerce accounts for 5.91% of this annual total, with $47.01 billion dollars in retail e-commerce sales. Monthly sales have at least tripled since 2017: Statista notes that average monthly e-commerce retail sales in 2017 were $1 billion[4], whereas this past year the lowest month was $3.09 billion in February 2024 and the highest $4.94 billion in November 2023.

Statista reports on a consumer survey that found most shoppers prefer in-person shopping[5], which supports the idea that when Canadian consumers feel in-person shopping is an option, they will choose this over online shopping. As shoppers entered the busy Fall season, the e-commerce share rose again in September 2024 to the third highest rate in the last year at 6.26%.

2 International Trade Administration. eCommerce. 2023-11-04. Canada – Country Commercial Guide. https://www.trade.gov/country-commercial-guides/canada-ecommerce
3 Statistics Canada. Table 20-10-0056-01 Monthly retail trade sales by province and territory. https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=2010005601
4 Statista. 2024-07-01. E-commerce in Canada – statistics & facts. https://www.statista.com/topics/2728/e-commerce-in-canada/
5 Statista. 2024-07-01. E-commerce in Canada – statistics & facts. https://www.statista.com/topics/2728/e-commerce-in-canada/

3.3.4 Top Online Retail Categories and Stores

The two leading retail categories for 2024 e-commerce in Canada are fashion with a 21% market share followed by electronics with an 18% share[6]. The top three e-commerce stores in Canada in 2023 were Amazon.ca ($12.5 billion net sales), Walmart.ca ($5.2 billion), and Costco.ca ($2.4 billion)[7].

American Retailers & Canadian E-Commerce

The content below was prepared prior to the current Tariff "Trade War", which has led to a rise in Canadian brand support at the expense of traditional American retailers, which is likely to have an impact, although the duration and impact of which is still yet to be determined.

American-based businesses are an important player in the Canadian online consumer market. Canadian e-consumers are significant enough to the International Trade Administration (ITA) of the United States that the agency published a profile of eCommerce in Canada in November 2023. While Statistics Canada collects data from Canadian-based retailers only, the ITA says, "close to half of Canadian consumers' online purchases are made at foreign retail sites." [8]

Statista found that six of the top ten online stores in Canada were based in the United States in 2023[9].

Two brick-and-mortar retailers and one e-commerce giant are dominating growth in US retail sales. Women's Wear Daily (WWD) reported on the latest Retail Funnel market share report from Morgan Stanley, noting eye-opening findings by stock analysts Simeon Gutman and Brian Nowak[10]. The analysts discovered that in the third quarter, Costco, Walmart and Amazon accounted for about 46% of all incremental retail sales, which are sales attributed to marketing campaigns or sales promotions. *"That means that 46 cents of every dollar of retail growth in the US went to one of those three companies,"* WWD reported.

Amazon represented 24% of incremental sales growth in the third quarter, followed by Walmart at 12.2% and Costco at 9.8%, according to WWD's reporting on the study. Walmart's growth has been so robust, in fact, that the retailer recently lifted its projection for fiscal year 2025 net sales from a range of 3.75% to 4.75% to a range of 4.8% to 5.1%. Walmart's 2025 fiscal year ends Jan. 31, 2025.

6 Statista. 2024-07-01. E-commerce in Canada – statistics & facts. https://www.statista.com/topics/2728/e-commerce-in-canada/

7 Statista. 2024-06-25. Top online stores in Canada in 2023, by e-commerce net sales. https://www.statista.com/forecasts/871090/canada-top-online-stores-canada-ecommercedb

8 International Trade Administration. eCommerce. 2023-11-04. Canada – Country Commercial Guide. https://www.trade.gov/country-commercial-guides/canada-ecommerce

9 Statista. 2024-07-01. E-commerce in Canada – statistics & facts. https://www.statista.com/topics/2728/e-commerce-in-canada/

10 Women's Wear Daily, 2024-11-20, Amazon, Walmart and Costco Are Running Away with 46 Percent of Retail Growth.
https://wwd.com/business-news/financial/amazon-walmart-costco-account-for-46-percent-retail-growth-1236730113/

Restaurant Trends

To lay a foundation for the food and beverage opportunity, a summary of trends in Quick Service (QSR) and Full Service restaurants (FSR) in the Canadian marketplace is provided, which focuses primarily on the evolution of business size and performance metrics. Operational, management, and brand strategies are not included in trends summary.

Limited or Quick Service Restaurants (QSR)

According to data from Statistics Canada and Restaurants Canada (February 2025), year-over-year QSR real sales in SK have grown by 1.1%, while year-to-date growth is 7.0%.

Over the past five plus years, QSRs in Canada have increasingly started adopting smaller footprints. This trend is driven by the growing popularity of digital ordering, delivery, and takeout, reducing the need for large on-premise dining spaces.

Many QSRs are also optimizing for drive-thru and curbside pickup services, often dedicating more space to these areas rather than indoor dining. The rise of ghost kitchens is further contributing to smaller physical restaurant sizes. These facilities cater exclusively to online orders, eliminating the need for customer-facing spaces. Moreover, these ghost kitchens are often located in light industrial spaces and thus are not seen as part of the traditional retail environment.

Digital sales, including mobile orders, delivery, and loyalty programs, are critical metrics for QSRs. Many chains report an increasingly significant percentage of their sales from digital channels, which relates back to their decreased space needs. QSRs focus heavily on labour efficiency, with trends toward automation (e.g., kiosks and robotic food preparation) to reduce labour costs and improve speed of service.

Sales productivity ($ psf) remains a key performance indicator, with smaller QSRs maximizing revenue through efficient operations and higher customer turnover. Sales productivity typically ranges from $400 to $1,000+ per square foot, where the higher range is most commonly found in food courts. Similarly high turnover branded retailers like Starbucks or Tim Horton's, especially where they are located in prime locations with strong digital and drive thru sales, also generate above average sales.

Full-Service Restaurants (FSR)

According to data from Statistics Canada and Restaurants Canada (February 2025), year-over-year FSR real sales in SK is down by 3.2%, while year-to-date has grown by 1.3%.

FSRs are exploring flexible space usage, including multi-purpose areas that can be reconfigured for different functions (e.g., private events or regular dining). Some FSRs are opting for smaller locations in high-traffic urban areas to optimize rent costs while maintaining a strong presence.

The pandemic led to an accelerated trend of utilizing outdoor spaces, leading to creative expansions such as patio dining.

As food costs and menu prices rise, especially for premium or experiential dining, average check size is a critical metric whereby FSRs are focusing on enhancing the dining experience to justify higher prices.

Monitoring occupancy rates and table turnover, particularly during peak hours, is vital. FSRs are more frequently employing digital reservation systems and dynamic pricing to maximize occupancy and revenue. A downside of this digitization, however, has been a rise in the number of reservation no-shows (estimated to be 25%) as the Restaurant Industry does not have cancellation penalties like other industries (such as personal services).

Sales productivities for FSRs generally ranges from $300 to $700 per square foot. Premium or fine dining establishments, particularly in high-traffic urban areas, can reach or exceed $700 per square foot.

Regardless of whether a FSR is local or a recognized brand, those FSRs with strong marketing, a loyal customer base, and higher than average check sizes tend to perform better. Overall market demographics with respect to household incomes, family composition, and discretionary spending play a key role in the FSR sector, particularly when differentiating fine dining from upscale casual and family casual formats.

Pub & Bar Restaurant (PBR)

According to data from Statistics Canada and Restaurants Canada (February 2025), year-over-year PBR real sales in SK have declined by 14.9% with a similar downward trend in year-to-date of 13.6%.

In the PBR sector, there has been an overall shift towards smaller, more specialized pubs and bars that cater to specific tastes or themes, such as craft beer pubs, whiskey bars, or gastro-pubs. These establishments typically have a more intimate atmosphere and offer a curated experience.

Some bars and pubs are incorporating hybrids or blending concepts, such as combining a bar with a restaurant, microbrewery, or entertainment venue (e.g., live music, arcade games). This diversification helps attract a broader audience and keeps patrons engaged longer.

There is a strong preference for craft beers, local wines, and spirits, driving pubs and bars to partner with local breweries and distilleries. This trend is part of a broader movement towards supporting local businesses and sustainable practices.

An increasing number of patrons are looking for healthier drink and food options, including low-alcohol or non-alcoholic beverages, organic ingredients, and plant-based menu items. Pubs and bars are adapting by offering more of these choices.

Consumers are seeking more than just food and drinks; they want a memorable experience. This has led to an increase in themed nights, mixology classes, and other interactive events that enhance the customer experience.

In terms of performance, smaller venues often focus on maximizing revenue per square foot through efficient space utilisation and high-margin offerings (e.g., premium drinks, specialty cocktails, small plates). This metric is crucial as rental costs in prime urban locations continue to rise.

While large franchises continue to dominate in terms of scale, independent pubs and bars are thriving by offering unique, localized experiences that cater to niche markets.

The PBR sector has shown resilience by adapting to changing consumer behaviors, such as the rise in takeout and delivery, even in a traditionally dine-in-focused segment.

Overall Food & Beverage Industry Dynamics

Both QSRs and FSRs are recovering post-pandemic, but with differing strategies. QSRs have largely bounced back due to their focus on delivery and takeout, while FSRs are gradually recovering as dine-in traffic returns. However, the recent repayment requirement of CERB Loans has caused a number of FSRs to close.

There is a growing emphasis on sustainability and health-conscious menus. Both QSRs and FSRs are responding with eco-friendly practices and healthier food options, which can also influence performance metrics like customer retention and average spend.

The overall industry sees ongoing competition and consolidation, with larger chains acquiring smaller brands to expand their market share. This consolidation often leads to more standardized performance metrics across multiple locations.

In summary, the Canadian restaurant industry is seeing shifts towards smaller, more efficient spaces, particularly in the QSR segment, while FSRs focus on optimizing space for varied experiences. Performance metrics are increasingly digital and efficiency-focused, reflecting changes in consumer behavior and operational challenges.

Key Factors Influencing Food & Beverage Industry

Urban versus suburban locations significantly impact both sales productivity and occupancy costs, with urban areas generally driving higher sales per square foot but also higher rent costs. Well-known chains or restaurants with a loyal customer base often perform better in terms of sales productivity and can sometimes negotiate more favorable lease terms.

The ability to maximize sales through digital channels, efficient table turnover, and optimized space utilisation directly impacts the performance metrics of food and beverage operators.

North Battleford - a closer look

- *city-wide occupied retail-only inventory of 996,000 sf*
- *ratio of 64% local to 36% branded retail businesses*
- *24 sf per capita retail space (measured against trade area population, with an optimal target of 25 sf per capita)*
- *city-wide ground floor vacancy of 9.9% (169,530 sf)*
  - ***Prioritize leasing two largest vacancies (21,872 sf and 27,717 sf) with target retailers compatible in the market such as Value Village, Goodwill, Winners, JYSK, Planet Fitness.***
- *retail-only inventory / businesses / vacancy by node:*
  - ***Downtown BID (212,640 sf / 67 businesses / 69,688 sf vacant)***
  - ***Downtown North (82,273 sf / 29 businesses / 18,105 sf vacant)***
  - ***North (243,826 sf / 38 businesses / 1,324 sf vacant)***
  - ***South (416, 845 sf / 52 businesses / 60,171 sf vacant)***
  - ***East (24,036 sf / 9 businesses / 17,024 sf vacant)***
  - ***Neighbourhood (11,560 sf / 4 businesses / 3,218 sf vacant)***

4.0
retail commercial supply

4.0 Retail commercial supply

4.1 Introduction

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

This section will provide a detailed inventory of the retail inventory and business mix that comprises the current commercial market in North Battleford, which serves as the core shopping and service centre for the identified trade area. A detailed inventory is included in **Appendix A**.

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

4.2 Market overview

FBM documented the City of North Battleford's existing retail inventory through fieldwork conducted in November 2024, supplemented and validated by subsequent desktop research. Various aspects of North Battleford's retail stock were recorded, including business names, addresses, merchandise categories, estimated unit sizes, vacancies, and North American Industry Classification System (NAICS) codes.

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

According to the City's OCP, North Battleford has three primary retail areas defined as follows: "Downtown commercial land use in North Battleford is located along 100th to 103rd Street, bordered by 14th and Railway Avenues. Arterial commercial development, continues along 100th Street (and eventually 101st Street) up to the north boundary of the City. The third area is located in the southeast portion of the City along the Yellowhead Highway." (Official Community Plan, p. 13).

However, a deeper on-the-ground analysis identified a more nuanced retail node structure. For the purposes of this study, FBM grouped the retail inventory into six nodes:

1. Downtown Business Improvement District (BID)
2. Downtown North (100th St between 14th & 20th Ave)
3. North (100th St, north of 20th Ave)
4. South (either side of Hwy 16)
5. East (primarily near Territorial Drive & 15th Ave)
6. Neighbourhood (outlying local retail).

Figure 4.1: North Battleford retail nodes

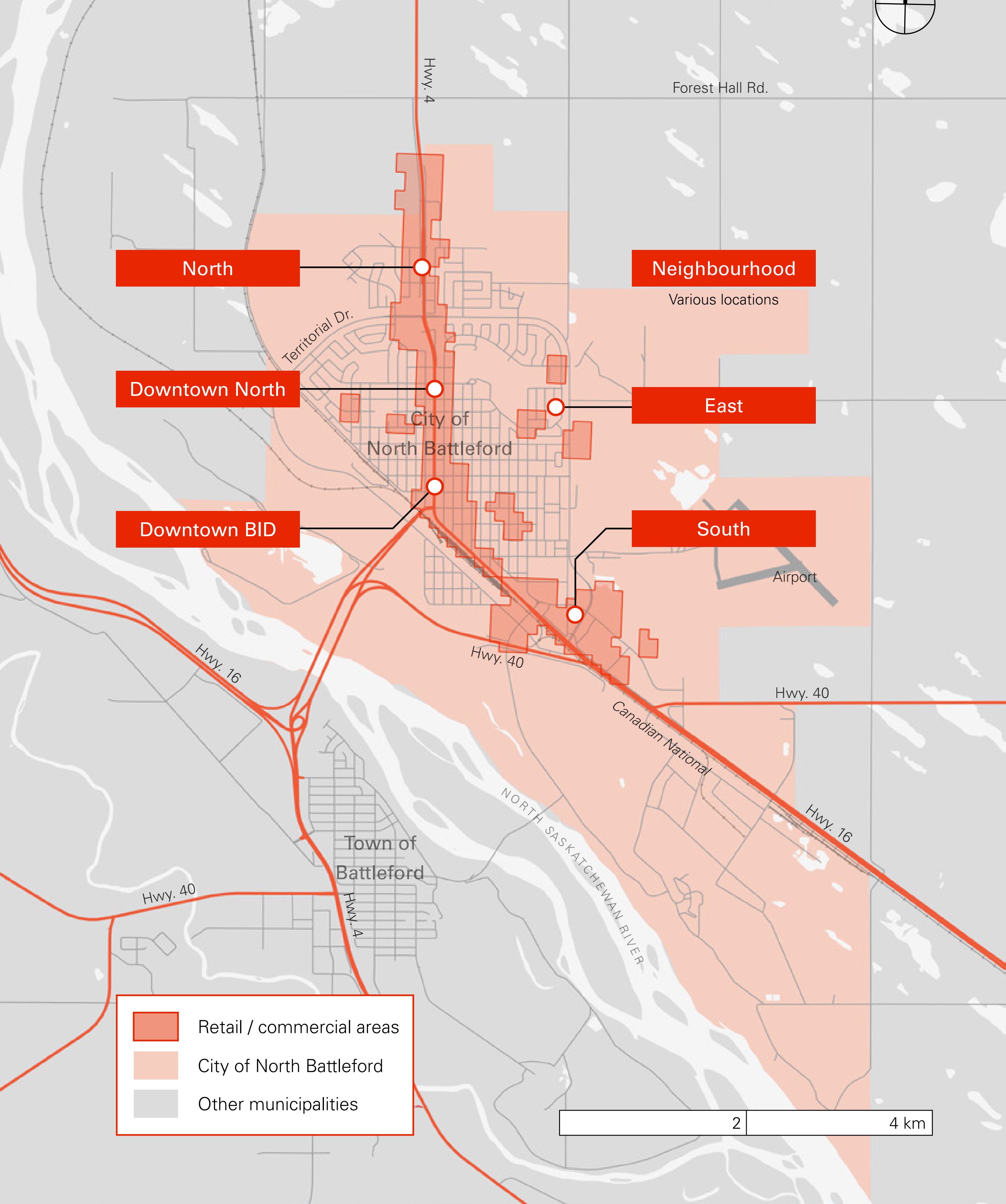


Figure 4.1 provides an overview of the location of commercial land uses in the City of North Battleford, with each of the three specific nodes illustrated in separate figures later in this section.

4.3 Overall retail summary

The retail inventory for the City of North Battleford is summarized in **Table 4.1** and **Figures 4.1 and 4.2**.

When excluding non-retail segments, as well as automotive service and vacant retail space, the "retail-only" occupied inventory in the city amounts to 996,180 sf performing at an estimated productivity of $283 per sf.

The above reflects approximately 68% share of the total ground-floor, streetfront commercial space in the city, which is estimated at approximately 1,714,345 sf. This figure includes non-retail services or quasi-retail uses in retail-type street-level spaces, including community services, professional and financial services, and medical and wellness services.

4.4 Overall retail inventory by category

Table 4.1 and **Figure 4.2** provide a breakdown of the City of North Battleford's retail inventory by category.

The top occupied retail categories are shown below, excluding non-retail segments and auto service:

- Grocery, convenience and specialty foods (168,937 sf)
- Home improvement & gardening (137,782 sf)
- Auto/RV/motorshops dealership (112,009 sf)
- Fashion & Accessories (101,931 sf)
- Restaurants & Pubs (93,786 sf)

The Top 5 are followed closely by Quick Service F&B, Specialty Retail, Home Furnishings, and Home Electronics & Appliances.

From a merchandise category perspective, North Battleford has a healthy offering of day-to-day goods and services, but also has a stronger than average share of Fashion & Accessories, Home Furnishings, and Home Electronics & Appliances.

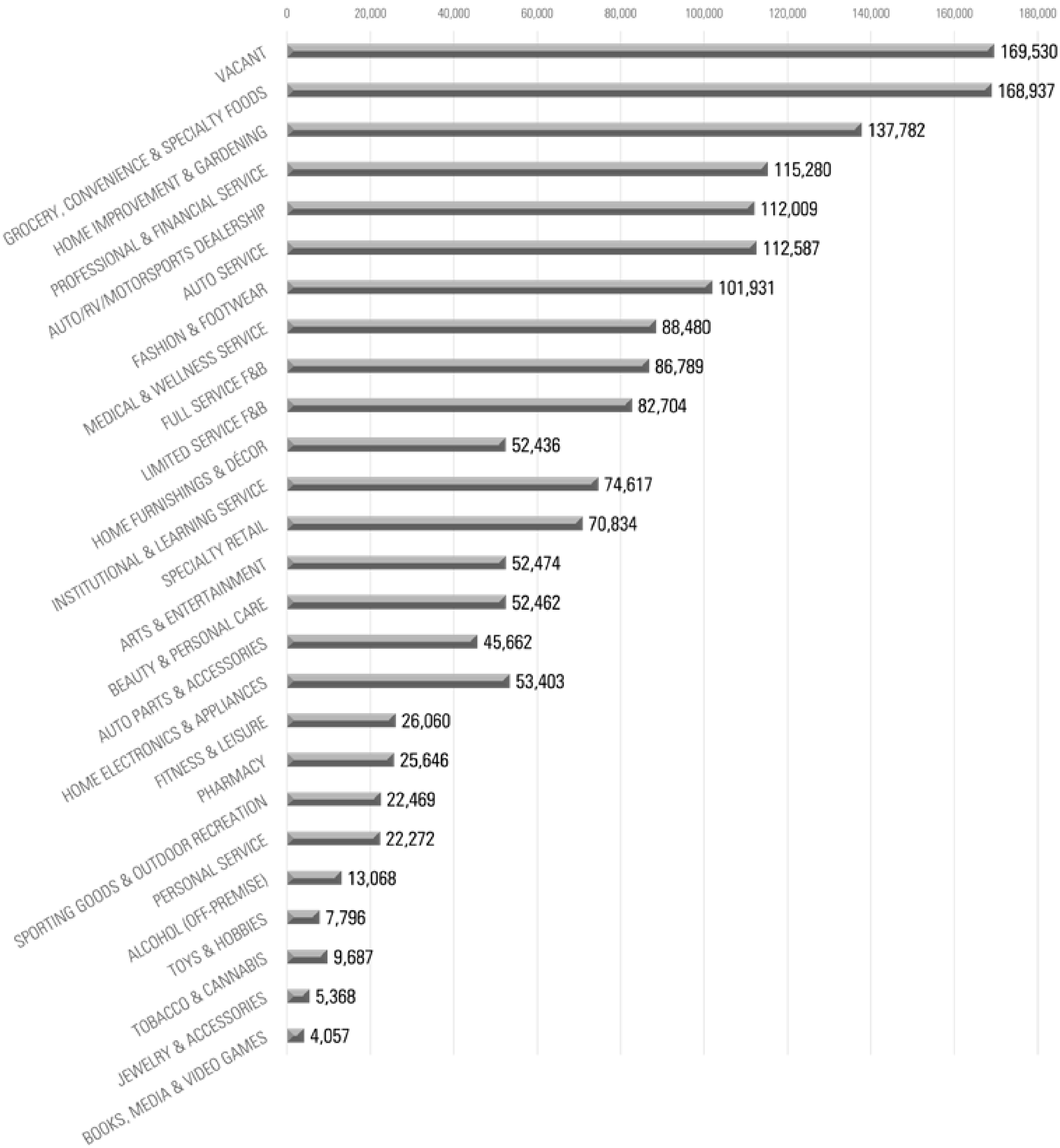
While much of these may not be singular retailers, they are represented in the merchandise offerings of general merchandisers and well-represented brands, such as Walmart, City Furniture, Staples, The Brick, Canadian Tire, and Marks. However, there are still opportunities for strategic fits in the local market that could include brands like Winners, Marshalls, Value Village, and Visions Electronics, as examples.

Table 4.1: Total streetfront commercial business inventory

North Battleford
Treaty Six Territory | Heartland of the Métis | Saskatchewan | Canada

RETAIL MERCHANDISE or BUSINESS CATEGORY	General Classification	ALL NODES FLOORSPACE (sq. ft.)	ALL NODES FLOORSPACE MIX (%)
VACANT	N/A	169,530	9.9%
GROCERY, CONVENIENCE & SPECIALTY FOODS	Retail	168,937	9.9%
HOME IMPROVEMENT & GARDENING	Retail	137,782	8.0%
PROFESSIONAL & FINANCIAL SERVICE	Non-Retail	115,280	6.7%
AUTO SERVICE	Auto	112,587	6.6%
AUTO/RV/MOTORSPORTS DEALERSHIP	Auto	112,009	6.5%
FASHION & ACCESSORIES	Retail	101,931	5.9%
RESTAURANTS & PUBS	Retail	93,786	5.5%
MEDICAL & WELLNESS SERVICE	Non-Retail	88,480	5.2%
QUICK SERVICE F&B	Retail	75,707	4.4%
INSTITUTIONAL & LEARNING SERVICE	Non-Retail	74,617	4.4%
SPECIALTY RETAIL	Retail	67,415	3.9%
HOME FURNISHINGS & DÉCOR	Retail	57,689	3.4%
HOME ELECTRONICS & APPLIANCES	Retail	53,403	3.1%
ARTS & ENTERTAINMENT	Retail	52,474	3.1%
BEAUTY & PERSONAL CARE	Retail	52,462	3.1%
AUTO PARTS & ACCESSORIES	Auto	45,662	2.7%
FITNESS & LEISURE	Retail	26,060	1.5%
PHARMACY	Retail	25,786	1.5%
SPORTING GOODS & OUTDOOR RECREATION	Retail	22,469	1.3%
PERSONAL SERVICE	Retail	22,272	1.3%
ALCOHOL (OFF-PREMISE)	Retail	13,068	0.8%
TOBACCO & CANNABIS	Retail	9,687	0.6%
TOYS & HOBBIES	Retail	5,827	0.3%
JEWELRY	Retail	5,368	0.3%
BOOKS, MEDIA & VIDEO GAMES	Retail	4,057	0.2%
UNKNOWN	Non-Retail	0	0.0%
TOTAL - all streetfront inventory		**1,714,345**	
Retail ONLY Floorspace (excluding Medical & Wellness, Professional, Auto & Vacant)		**996,180**	
Total Estimated Retail Sales (excluding Medical & Wellness, Professional, Auto & Vacant)		**$281,591,725**	
Estimated Retail Sales Productivity ($/sf)		**CA$283**	
total above reflect GENERAL MERCHANDISE categories broken down into respective categories	*Retail*	*282,339*	

Figure 4.2: Total streetfront commercial business inventory



4.5 Overall retail vacancy

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

The current overall vacancy rate of all street level commercial is estimated at 9.9% (169,530 sf). At the nodal level, the vacancy rate varies across the city with the most prominent vacancies in Downtown BID and South Nodes (refer to **Figures 4.3 and 4.4)**. Vacancy in North Battleford is higher than what is normally considered acceptable in a healthy retail market, with opportunity to support new demand for retail space.

As an industry-accepted comparable standard, 4-5% vacancy is considered a healthy retail environment. The likely implication of this higher vacancy will be reduced demand for new space, except where older vacancies may be considered obsolete and not compatible for retailers. This latter statement will be most applicable to vacancies in the Downtown BID, where the building stock is older and in some cases, more expensive to retrofit.

A driving factor in the higher vacancy rate is the presence of larger vacant spaces at the former Giant Tiger in the downtown (21,872 sf), and the now-vacated Peavey Mart in the South node (27,717 sf). Additionally, the former Gamex Bingo (15,974 sf), located in a semi-industrial area south of the railway tracks, is also vacant but because of its industrial location is excluded from the vacancy figures in this study.

Vacancies in the new Eagles Landing development (17 units each around 1,200 sf plus a pad site near the new Starbucks) will gradually be absorbed and will mitigate the high overall vacancy rate, while Downtown revitalization efforts - including a new tax incentive policy - may help to improve the vacancy rate in the city centre.

In a scenario in which the 2 largest retail vacancies as well as new space under construction at Eagles Landing were not part of the vacancy rate, the overall vacancy rate would drop to approximately 6.1%. This illustrates the significant impact that larger retailers can have on a community if they do not succeed.

Priorities should therefore be placed on trying to backfill the two largest vacancies with retailers compatible in the market such as Value Village, Winners, JYSK, etc. The alternative, for spaces like the former Giant Tiger, might be to consider non-retail or community uses such as a conversion to indoor pickleball courts or other possible commercial recreation uses like SNAP Fitness, Planet Fitness, or Goodlife Fitness.


Figure 4.3: Vacancies
(Downtown and Downtown North)
18 Ave.
17 Ave.
16 Ave.
15 Ave.
14 Ave.
13 Ave.
12 Ave.
97 St.
98 St.
99 St.
100 St.
101 St.
102 St.
103 St.
104 St.
Library
Central
Park
Formerly Giant Tiger
Retail spaces
Vacant/Available spaces

Figure 4.4: Vacancies (South retail node)

4.6 Ratio of Local Independent vs Chain/Franchise Stores

The retail commercial mix is reflected in a unique retail environment across the community in various nodes and formats. North Battleford's commercial business landscape is diversified across several categories, store sizes, and mix of local independent retailers versus chain store/franchise brands (i.e. those with multiple locations). In the larger nodes like the South with highway-oriented commercial at the Frontier Centre, a concentration of the commercial business mix is oriented towards recognized and larger brand retailers with larger store sizes.

Overall, North Battleford offers a balance of specialty retail and day-to-day shops and services, as well as Community Services and Personal Services, and localized presence in sectors such as Auto/RV/Motorsports Dealerships, Home Improvement & Gardening, and Auto Service, with a slant towards familiar North American brands.

As shown in **Table 4.2** and **Figure 4.5,** North Battleford's retail market has a mix of 64% local retail businesses to 36% chain/franchise businesses in terms of the overall store count, and a mix of 40% local to 60% chain/franchise in terms of the floorspace. Not unexpectedly, the local businesses are typically smaller in size, while the recognized branded businesses are larger and reflect the higher number of junior to mid sized box retailers present across the city. Consequently, the average chain/franchise store size is 8,466 sf compared to the average local independent store size of 3,199 sf.

Given the competitive regional market includes Lloydminster and Saskatoon, the current ratio of branded to local seems adequate, but could potentially be expanded with some strategic new additions.

That said, with North Battleford's modest historic and forecasted growth, the likelihood of increasing local independent retailers may be a challenge if the quality of spaces, particularly in the Downtown BID, are not improved to adequate levels for businesses.

Industry Benchmark Ratios

In urban areas, chains often dominate high-traffic shopping malls, commercial streets, and retail centres. Chain/franchise stores typically make up about 30-50% of total businesses in many developed retail environments. In smaller towns or less developed areas, this percentage may be lower, around 15-30%, as chains are less prevalent.

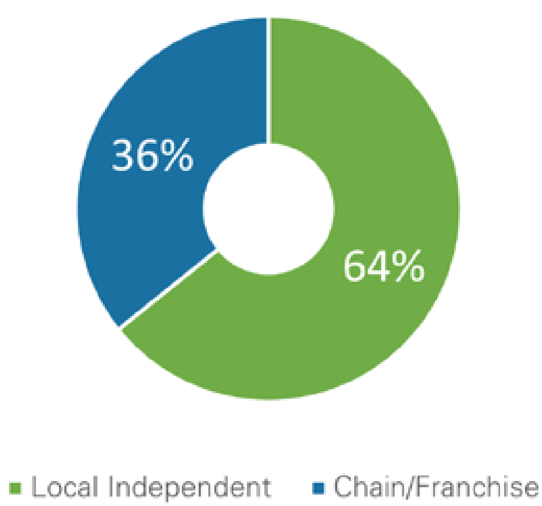
Local independent stores usually make up the remaining 50-70% of businesses. These stores are often concentrated in areas with a strong emphasis on local culture or limited chain penetration.

In terms of typical floorspace ratios, chain/franchise stores tend to occupy larger individual units, such as anchor stores in malls, supermarkets, and big-box retailers. Chains/franchises may account for 60-80% of total retail floorspace in high-density shopping areas, despite their lower number of individual businesses.

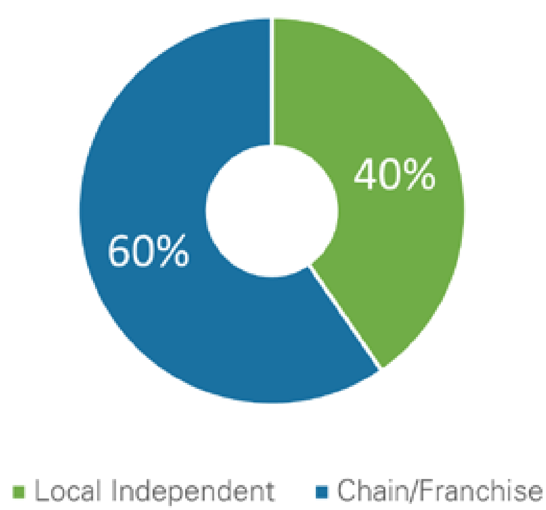
Table 4.2: Total ratio of local to chain/franchise retailers

Total RETAIL only - CITYWIDE **(excluding Auto, Medical, Professional, Community)**			
	Local Independent	131	204
	Chain/Franchise	73	
business count	Local Independent	64%	
business count	Chain/Franchise	36%	
floorspace	Local Independent	419,010	1,037,010
floorspace	Chain/Franchise	618,000	
floorspace	Local Independent	40%	
floorspace	Chain/Franchise	60%	
	Average Store Size	5,083	
	Avg Local Independent Size	3,199	
	Avg Chain/Franchise Size	8,466	

Figure 4.5: Total ratio of local to chain/franchise retailers by business count and by floorspace



business count



floorspace

Conversely, independent businesses often occupy smaller spaces and may cluster in districts with lower rents. Their share of total floorspace is typically 20-40%, even though they make up the majority of businesses.

Generally, chains/franchises are growing their share of floorspace as they expand into smaller cities and towns while independent stores thrive in niche markets, artisan offerings, and areas emphasizing local identity typically in smaller footprints where their lease rates and overall occupancy costs can be better managed.

4.7 Retail space per capita

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

As a starting point, **Figure 4.6** depicts the Target Retail Space Per Capita, which provides a baseline for determining how much retail per capita is best suited to a community, according to its population size.

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

The current retail space per capita, as calculated by FBM, takes into account a trade area beyond simply North Battleford's geopolitical boundary.

Figure 4.6 is meant to illustrate a general indication of retail opportunity and representation for communities, with an understanding that some variations do exist. Many location specific factors contribute to an area's overall retail market, and cannot be addressed in a general chart or graph. Such locational factors can include specialized demands of a community, or unique characteristics that warrant certain retail traits.

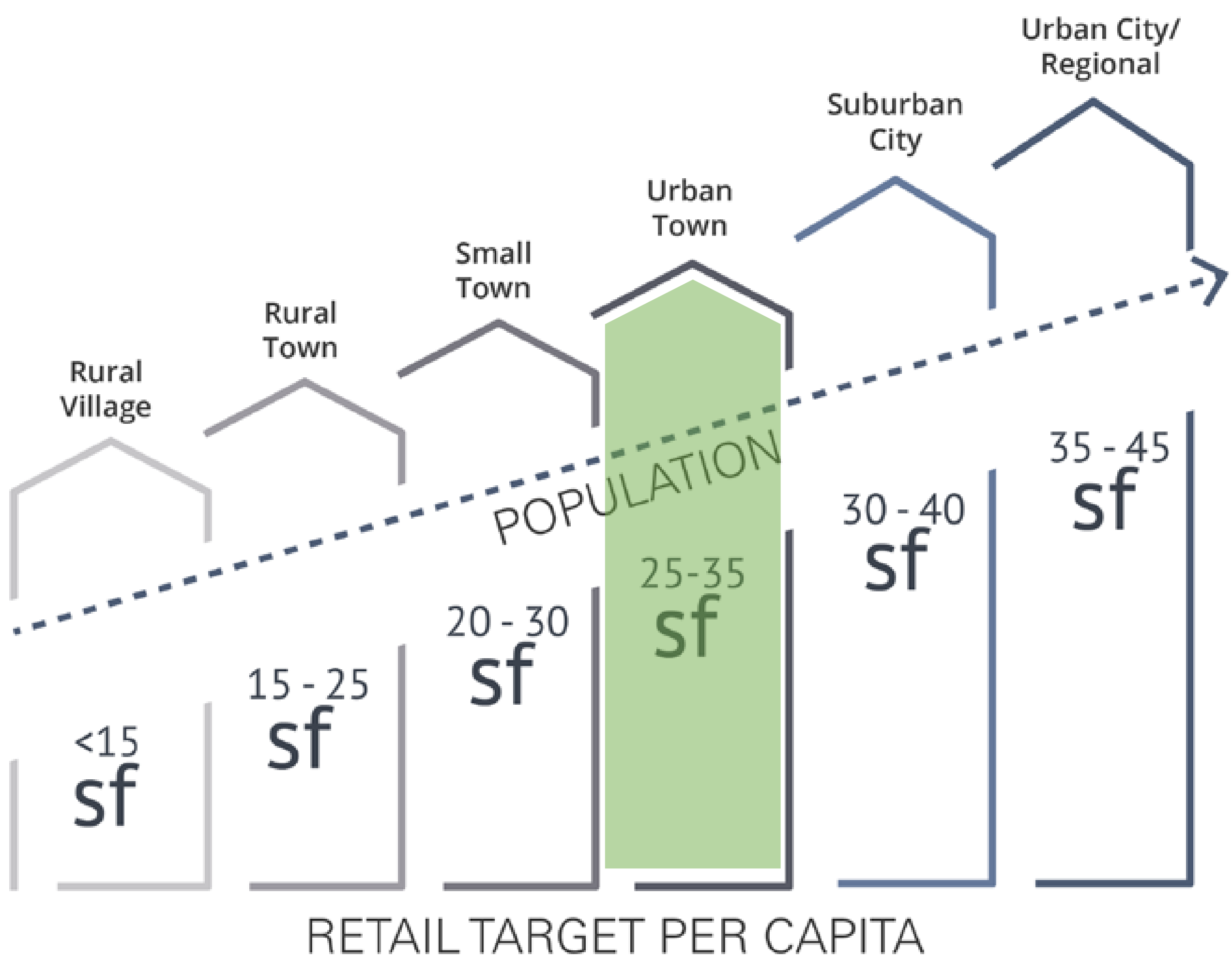
In most urban markets in Canada, a typical benchmark for retail space per capita is in the range of 30 - 40 sf.

Using **Figure 4.6** as a benchmark for retail space in North Battleford, a smaller city with a noticeable rural draw beyond its city boundary, the retail target should fall in the 25 -35 sf range.

Applying the city's current retail-specific, occupied floor area (996,180 sf) against North Battleford's 2024 estimated trade area population (41,171) reveals a ratio of **24 sf per capita,** which is reasonable and provides a validation of the draw that North Battleford's retail possesses in the broader rural market.

Given North Battleford's location at the crossroads of numerous major highways and existing retail draw, but being cognizant of the city's slower rate of population growth, the City should strive to maintain an overall retail space ratio in the range of 25 sf per capita relative to the trade area utilized in this study.

Figure 4.6: North Battleford retail space per capita



4.8 Retail inventory by node

Retail node (1) – Downtown BID

Retail Node 1 includes all retail uses in Downtown North Battleford, the area consistent with the boundaries of the Downtown Business Improvement District (BID). The inventory is documented in **Figures 4.7 and 4.8,** and **Table 4.3**.

North Battleford's traditional commercial centre is the downtown area highlighted in **Figure 4.7**, which was originally concentrated next to the rail line and gradually expanded northward. Downtown commercial uses are largely located along 100th to 103rd streets, stretching from Railway Avenue in the south up to 14th Avenue in the north.

Downtown North Battleford offers a distinctive, urban-style business mix and a strong concentration of independent restaurants, beauty salons, and specialty retail shops. There are also several prominent entertainment and leisure offerings, including the Capitol Cinemas and a bowling centre. Retail spaces tend to have a smaller footprint in the downtown area compared with other commercial areas, and typically sit directly on the street with no setback.

Referring to **Figure 4.8**, the mix of downtown retail is heavily weighted towards local/ independent businesses as opposed to chains/ franchises. In the Downtown BID, the ratio of businesses is 94% local to 6% brands with a similar ratio in terms of floorspace, particularly since the closure of Giant Tiger.

With such a strong local retail offering, which is higher than comparable downtowns, and a generally dated physical storefront ambiance, the resulting sales productivity for the Downtown BID is seen to be low at $147 per sf, whereas a potential target should be in the range of $175 per sf.

The Downtown BID node has a total streetfront floor area of 459,418 sf. Existing retail amounts to 212,640 sf (i.e. excluding health care and medical services, professional and financial services, community services, auto service, vacant space, and other non-retail uses).

The top retail categories by floor area are:

1. Arts & entertainment (41,333 sf)
2. Specialty retail (32,443 sf)
3. Restaurants & pubs (32,270 sf)
4. Beauty & personal care (25,543 sf)
5. Fashion & accessories (20,795 sf).

Referring to **Table 4.3,** vacancy in the area is estimated at 15.2%, which is a high figure requiring attention as part of the overall preservation and repositioning of the Downtown core. The largest vacancy is the former Giant Tiger store at approximately 21,872 sf, while overall there are an estimated 21 vacant/available spaces ranging in quality, compatibility, and size with an overall average size of 2,391 sf (excluding the Giant Tiger space).

Downtown has a relatively higher concentration of vacant retail space than other commercial areas in North Battleford. Efforts to promote revitalization and reinvestment in the downtown are ongoing and should continue to be prioritized. Most recently, in March 2025, City Council approved and updated a 5-year tax incentive program in support of renovation or new construction in the downtown core area.

Figure 4.7: Retail node (1) – Downtown BID

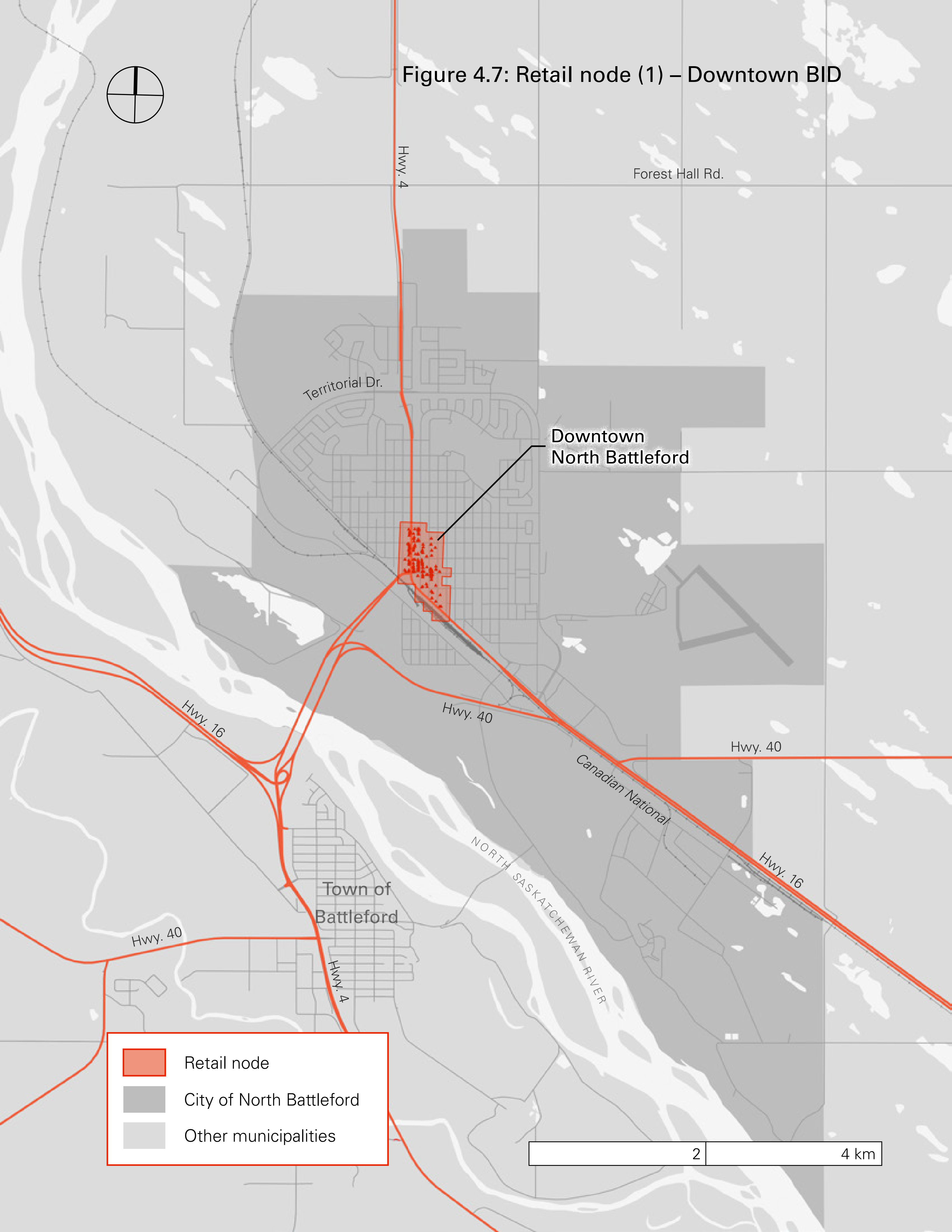
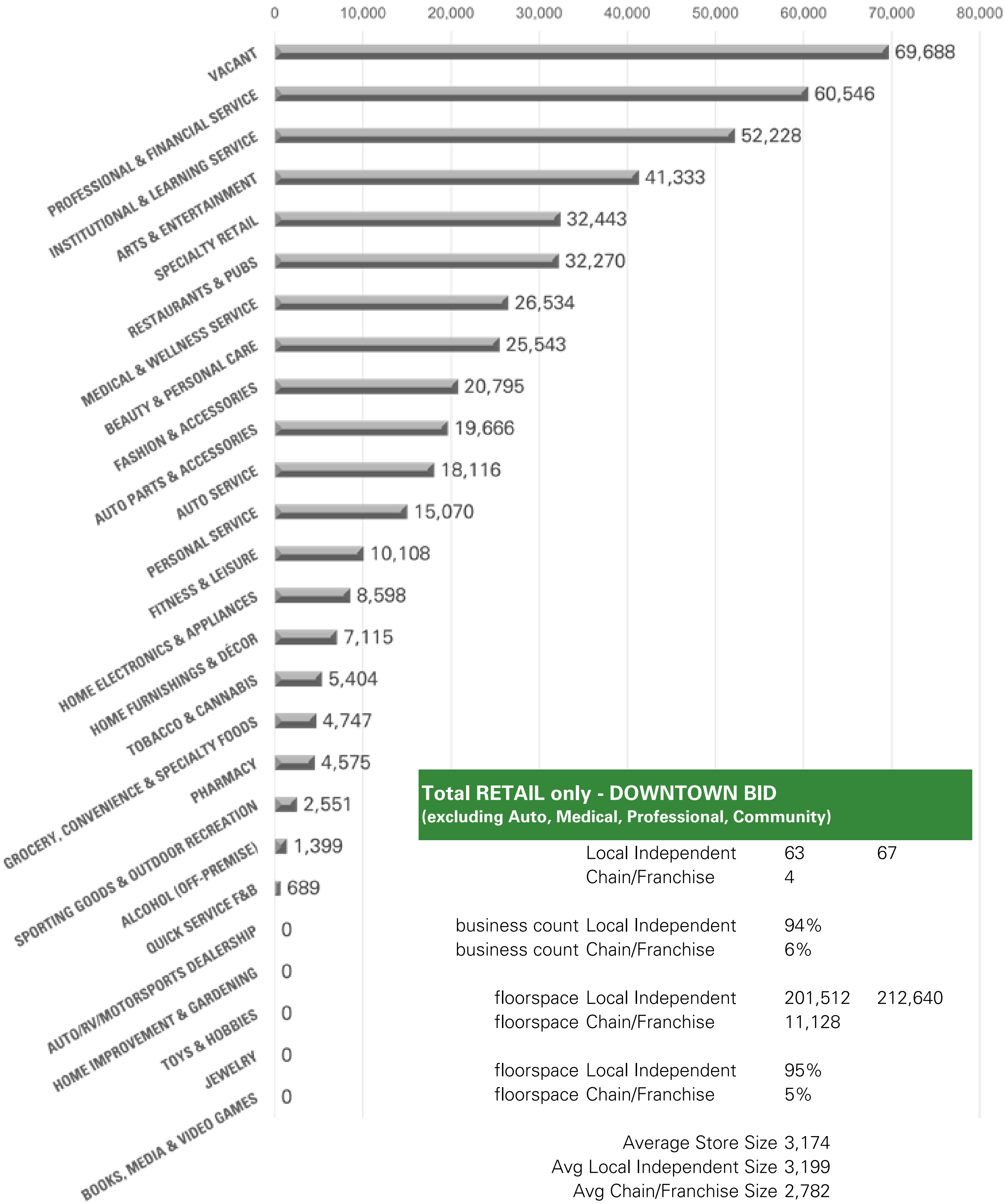


Table 4.3: Downtown BID streetfront business inventory

MERCHANDISE CATEGORY	DOWNTOWN BID FLOORSPACE (sq. ft.)	DOWNTOWN BID MIX (%)	DOWNTOWN BID BUSINESS COUNT
VACANT	**69,688**	**15.2%**	**21**
PROFESSIONAL & FINANCIAL SERVICE	60,546	13.2%	20
INSTITUTIONAL & LEARNING SERVICE	52,228	11.4%	13
ARTS & ENTERTAINMENT	41,333	9.0%	4
SPECIALTY RETAIL	32,443	7.1%	6
RESTAURANTS & PUBS	32,270	7.0%	12
MEDICAL & WELLNESS SERVICE	26,534	5.8%	13
BEAUTY & PERSONAL CARE	25,543	5.6%	15
FASHION & ACCESSORIES	20,795	4.5%	7
AUTO PARTS & ACCESSORIES	19,666	4.3%	2
AUTO SERVICE	18,116	3.9%	4
PERSONAL SERVICE	15,070	3.3%	4
FITNESS & LEISURE	10,108	2.2%	3
HOME ELECTRONICS & APPLIANCES	8,598	1.9%	4
HOME FURNISHINGS & DÉCOR	7,115	1.5%	2
TOBACCO & CANNABIS	5,404	1.2%	2
GROCERY, CONVENIENCE & SPECIALTY FOODS	4,747	1.0%	2
PHARMACY	4,575	1.0%	3
SPORTING GOODS & OUTDOOR RECREATION	2,551	0.6%	1
ALCOHOL (OFF-PREMISE)	1,399	0.3%	1
QUICK SERVICE F&B	689	0.1%	1
AUTO/RV/MOTORSPORTS DEALERSHIP	0	0.0%	0
HOME IMPROVEMENT & GARDENING	0	0.0%	0
TOYS & HOBBIES	0	0.0%	0
JEWELRY	0	0.0%	0
BOOKS, MEDIA & VIDEO GAMES	0	0.0%	0
General Merchandise			*0*
TOTAL	**459,418**		**140**
Retail ONLY Floorspace (excl Medical & Wellness, Professional, Auto Service & Vacant)	212,640	**46%**	67
Total Estimated Retail Sales (excl Medical & Wellness, Professional, Auto Service & Vacant)	**$31,276,256**		
Estimated Retail Sales Productivity ($/sf)	**$147**		

Figure 4.8: Downtown BID streetfront business inventory



Total RETAIL only - DOWNTOWN BID
(excluding Auto, Medical, Professional, Community)

	Local Independent	63	67
	Chain/Franchise	4	
business count	Local Independent	94%	
business count	Chain/Franchise	6%	
floorspace	Local Independent	201,512	212,640
floorspace	Chain/Franchise	11,128	
floorspace	Local Independent	95%	
floorspace	Chain/Franchise	5%	

Average Store Size	3,174
Avg Local Independent Size	3,199
Avg Chain/Franchise Size	2,782

Retail node (2) – Downtown North

Retail node 2 includes retail space on Highway 4, which runs along 100th Street northward out of the downtown core, between 14th Ave and 20 th Ave. The inventory is documented in **Figures 4.9 and 4.10** and **Table 4.4**.

The character of retail land use highlighted in **Figure 4.9** includes a combination of traditional mainstreet shops, converted residential buildings, and arterial-commercial building typologies, such as small strip malls set back from the street.

The majority of streetfront businesses in this area are in the Professional & Financial Services or Medical & Wellness sectors.

Referring to **Figure 4.10**, the mix of downtown retail is similar to Downtown and weighted towards local/independent businesses as opposed to chains/franchises. In the Downtown North node, the ratio of businesses is 86% local to 14% brands with a similar ratio in terms of floorspace as this area tends to have less land available for larger branded retailers, who tend to gravitate to the nearby North node or South nodes of the city.

With a stronger branded retail offering that does allow for drive through Quick Service F&B, including KFC, Dairy Queen, and Subway, the retail sales productivity of the Downtown North node is higher than the adjacent Downtown BID node, estimated at $216 per sf.

The Downtown North node has a total streetfront floor area of 185,484 sf. Existing retail amounts to 87,273 sf or 47% of the space (i.e. excluding health care and medical services, professional and financial services, community services, auto service, vacant space, and other non-retail uses).

The top retail categories by floor area are:

1. Quick Service F&B (17,491sf)
2. Home Electronics & Appliances (11,538 sf)
3. Restaurants & pubs (9,860sf)
4. Fashion & Accessories (8,138 sf)
5. Home Furnishings & Decor (8,019 sf)

Referring to **Table 4.4** vacancy in the area is estimated at 9.8% (18,105 sf), though a portion of this retail space was undergoing renovations at the time of fieldwork suggesting improvements that may be appealling for retailers. Overall there are an estimated 9 vacant/available spaces ranging in quality, compatibility, and size with an overall average of 1,811 sf.

The challenge of the Downtown North area is its location between Downtown and the more prominent North node. Over time, it could be expected that infill and redevelopment could become more attractive in this corridor which could provide more residential and perhaps alter the retail. It may be a consideration for longer term planning to reconsider retail in this area so that future opportunities could be re-directed back towards a revitalized Downtown core. The Downtown North may have a better future as mixed-business or continued professional services.

Figure 4.9: Retail node (2) – Downtown North

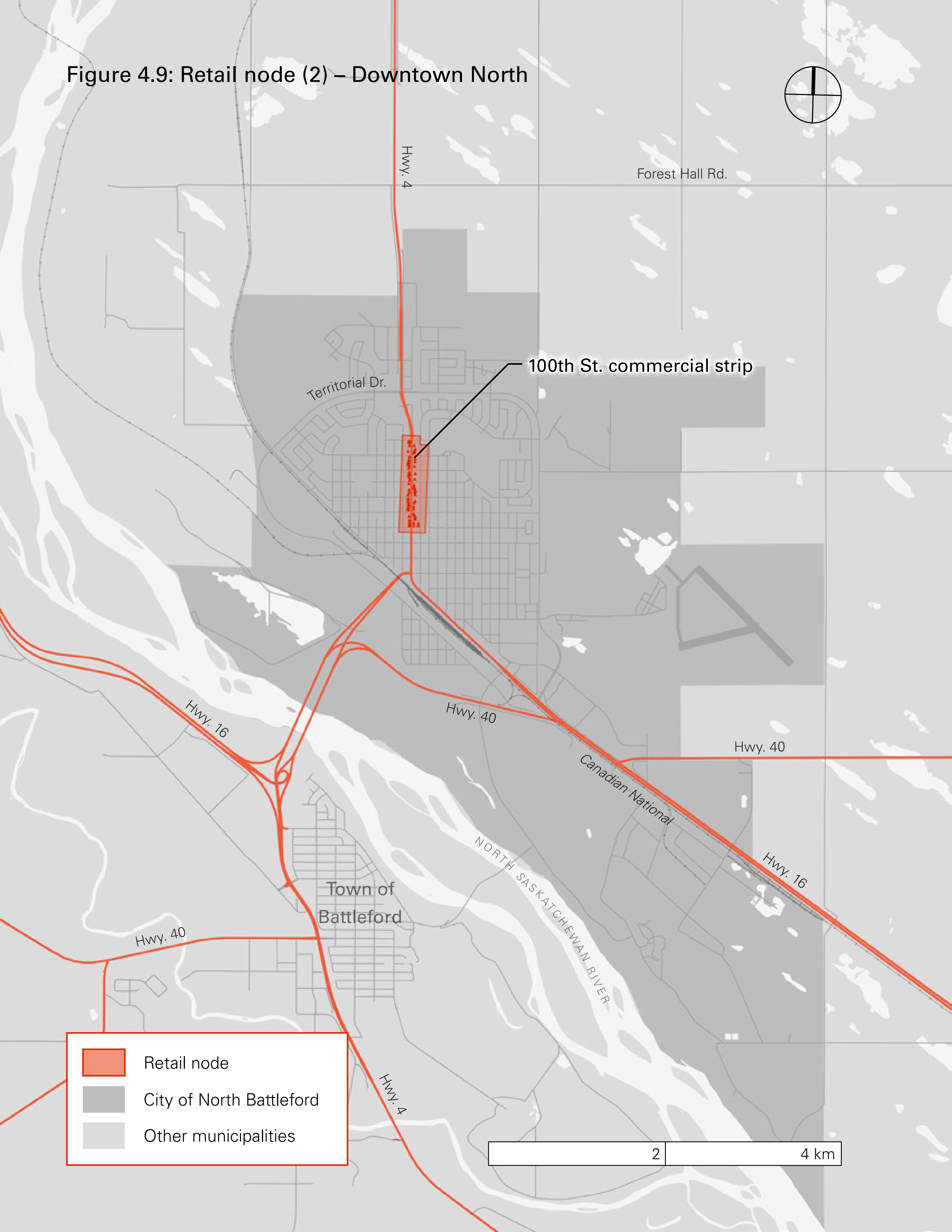
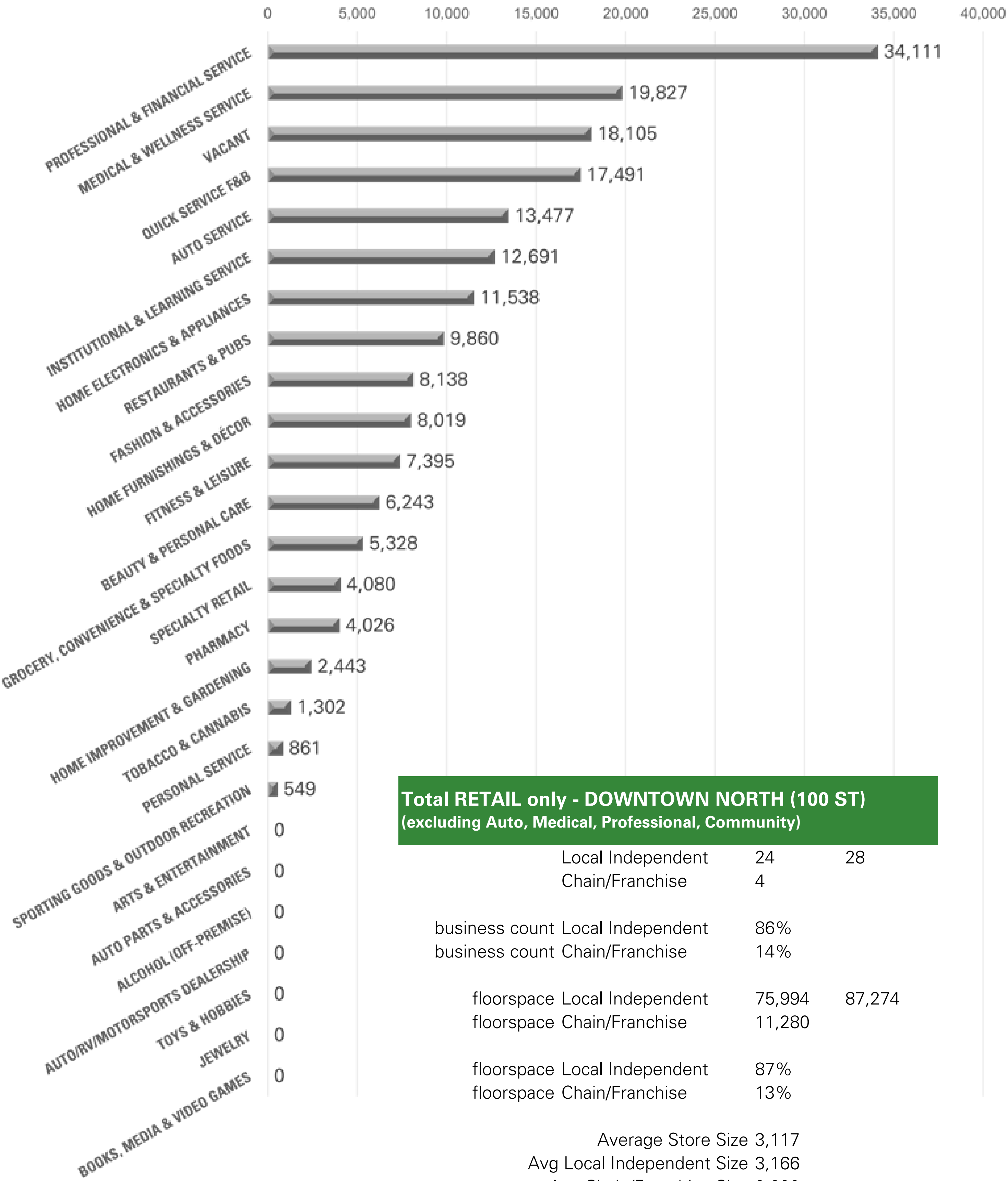


Table 4.4: Downtown North streetfront business inventory

MERCHANDISE CATEGORY	DOWNTOWN NORTH/100 St FLOORSPACE (sq. ft.)	DOWNTOWN NORTH/100 St SUB-NODE MIX (%)	DOWNTOWN NORTH/100 St BUSINESS COUNT
PROFESSIONAL & FINANCIAL SERVICE	34,111	18.4%	14
MEDICAL & WELLNESS SERVICE	19,827	10.7%	7
VACANT	**18,105**	9.8%	10
QUICK SERVICE F&B	17,491	9.4%	7
AUTO SERVICE	13,477	7.3%	3
INSTITUTIONAL & LEARNING SERVICE	12,691	6.8%	4
HOME ELECTRONICS & APPLIANCES	11,538	6.2%	1
RESTAURANTS & PUBS	9,860	5.3%	2
FASHION & ACCESSORIES	8,138	4.4%	2
HOME FURNISHINGS & DÉCOR	8,019	4.3%	1
FITNESS & LEISURE	7,395	4.0%	2
BEAUTY & PERSONAL CARE	6,243	3.4%	3
GROCERY, CONVENIENCE & SPECIALTY FOODS	5,328	2.9%	3
SPECIALTY RETAIL	4,080	2.2%	2
PHARMACY	4,026	2.2%	1
HOME IMPROVEMENT & GARDENING	2,443	1.3%	1
TOBACCO & CANNABIS	1,302	0.7%	1
PERSONAL SERVICE	861	0.5%	1
SPORTING GOODS & OUTDOOR RECREATION	549	0.3%	1
ARTS & ENTERTAINMENT	0	0.0%	0
AUTO PARTS & ACCESSORIES	0	0.0%	0
ALCOHOL (OFF-PREMISE)	0	0.0%	0
AUTO/RV/MOTORSPORTS DEALERSHIP	0	0.0%	0
TOYS & HOBBIES	0	0.0%	0
JEWELRY	0	0.0%	0
BOOKS, MEDIA & VIDEO GAMES	0	0.0%	0
General Merchandise			*1*
TOTAL	**185,484**		**67**
Retail ONLY Floorspace (excl Medical & Wellness, Professional, Auto Service & Vacant)	87,273	**47%**	29
Total Estimated Retail Sales (excl Medical & Wellness, Professional, Auto Service & Vacant)	**$18,830,283**		
Estimated Retail Sales Productivity ($/sf)	**$216**		

Figure 4.10: Downtown North streetfront business inventory



Total RETAIL only - DOWNTOWN NORTH (100 ST)
(excluding Auto, Medical, Professional, Community)

	Local Independent	24	28
	Chain/Franchise	4	
business count	Local Independent	86%	
business count	Chain/Franchise	14%	
floorspace	Local Independent	75,994	87,274
floorspace	Chain/Franchise	11,280	
floorspace	Local Independent	87%	
floorspace	Chain/Franchise	13%	
	Average Store Size	3,117	
	Avg Local Independent Size	3,166	
	Avg Chain/Franchise Size	2,820	

Retail node (3) – North

This node includes all retail uses north of 20th Avenue, which represents a point of transition from the more urban, mainstreet character of the "Downtown North" area to arterial retail and light industrial uses (not accounted for in this study). The inventory is documented in **Figures 4.11 and 4.12** and **Table 4.5**.

Most retail space in this cluster is located along Highway 4 as depicted in **Figure 4.11**, which runs along 100th Street northward out of the downtown core. The character of retail land use is predominantly arterial/highway commercial and big-box development. The intersection of Territorial Drive and Highway 4 is home to an enclosed shopping centre, the Discovery Co-op Mall.

Continuing even further north, approaching the city limit, some commercial land use can be found intermixed with industrial uses along Highway 4. There are also a number of car dealerships located along the highway service road.

Referring to **Figure 4.12**, the mix of the North node's retail shows a noticeable shift in the ratio of local to branded retailers, driven most likely by higher asking lease rates. In the North node, the ratio of businesses is 55% local to 45% brands while the ratio in terms of floorspace is 32% to 68%, driven by the larger anchor tenants in the area, most notably Co-op (Grocery and Home Centre), Sobeys, the Brick, and City Furniture, as well as car dealerships.

With a much stronger branded retail offering and mix that has high performing grocery retailers as well as high volume quick service food retailers, the retail sales productivity of the North node is estimated at just under $300 per sf ($291), which itself could be understating the productivity.

The North node has a total streetfront floor area of 416,683 sf. Existing retail amounts to 243,826 sf or 59% of the space (i.e. excluding health care and medical services, professional and financial services, community services, auto service, vacant space, and other non-retail uses).

The top retail categories by floor area are:

1. Auto/RV/Motorsports (112,009 sf)
2. Grocery, Convenience & Specialty Foods (61,817 sf)
3. Home Improvement & Gardening (56,662 sf)
4. Home Furnishings & Decor (27,977 sf)
5. Home Electronics & Appliances (22,130 sf).

The above leading mix is also supplemented by a strong supportive mix of Quick Service F&B (19,386 sf), which is represented by some very strong, recognized retailers (i.e., McDonald's, A&W, Tim Horton's).

Referring to **Table 4.5,** vacancy in the area is less than 1% (1,324 sf), comprising 2 smaller retail spaces in the Discovery Co-op Mall. The strength of the North node is evidenced by its mix of merchandise offering as well as brands. The favourable location provides justification for the stronger regional rural draw of North Battleford to communities further afar to the north on Highway 4. Another favourable attribute of this node is the fact that the Discovery Co-op Mall provides an enclosed environment, which is condusive to year round shopping with abundant parking.

Figure 4.11: Retail node (3) – North

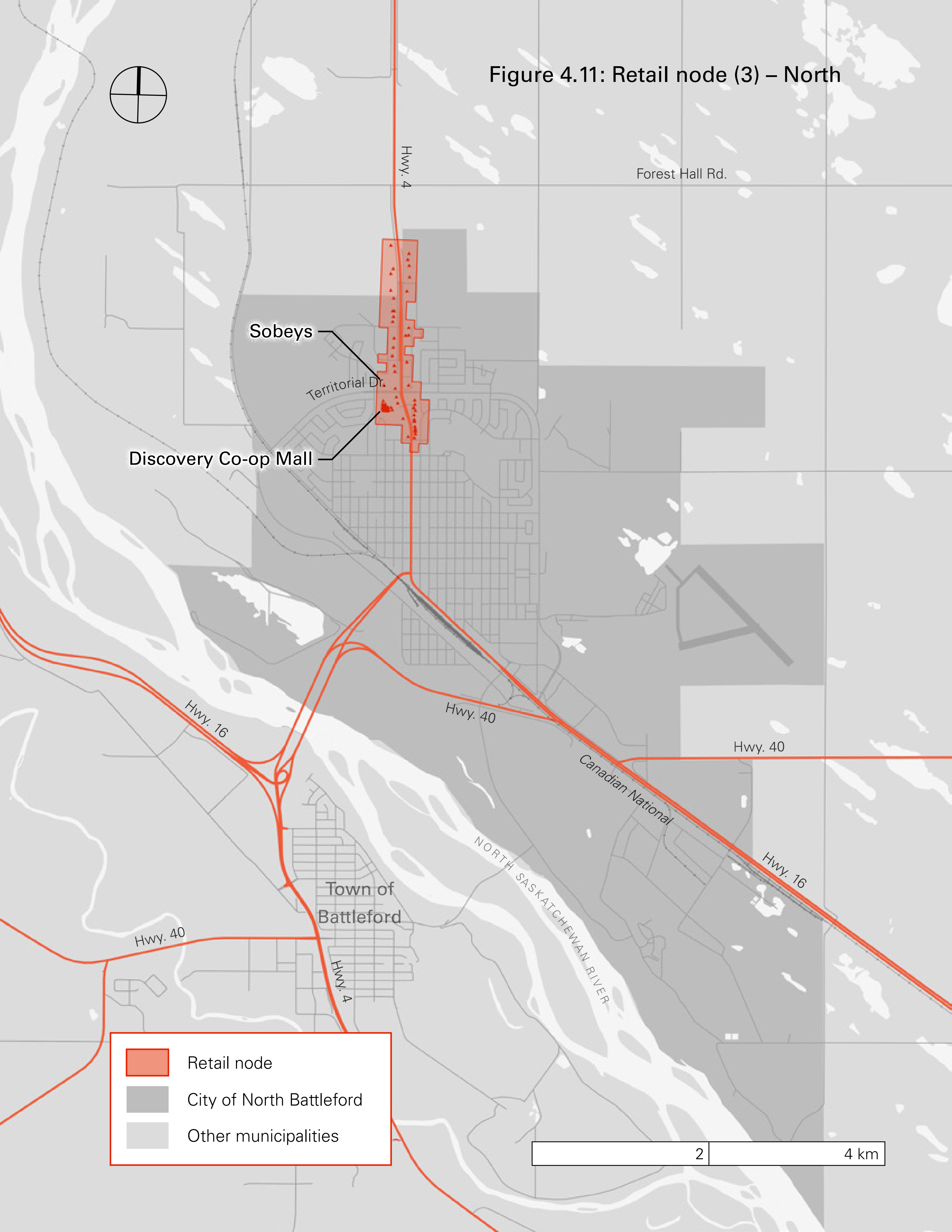
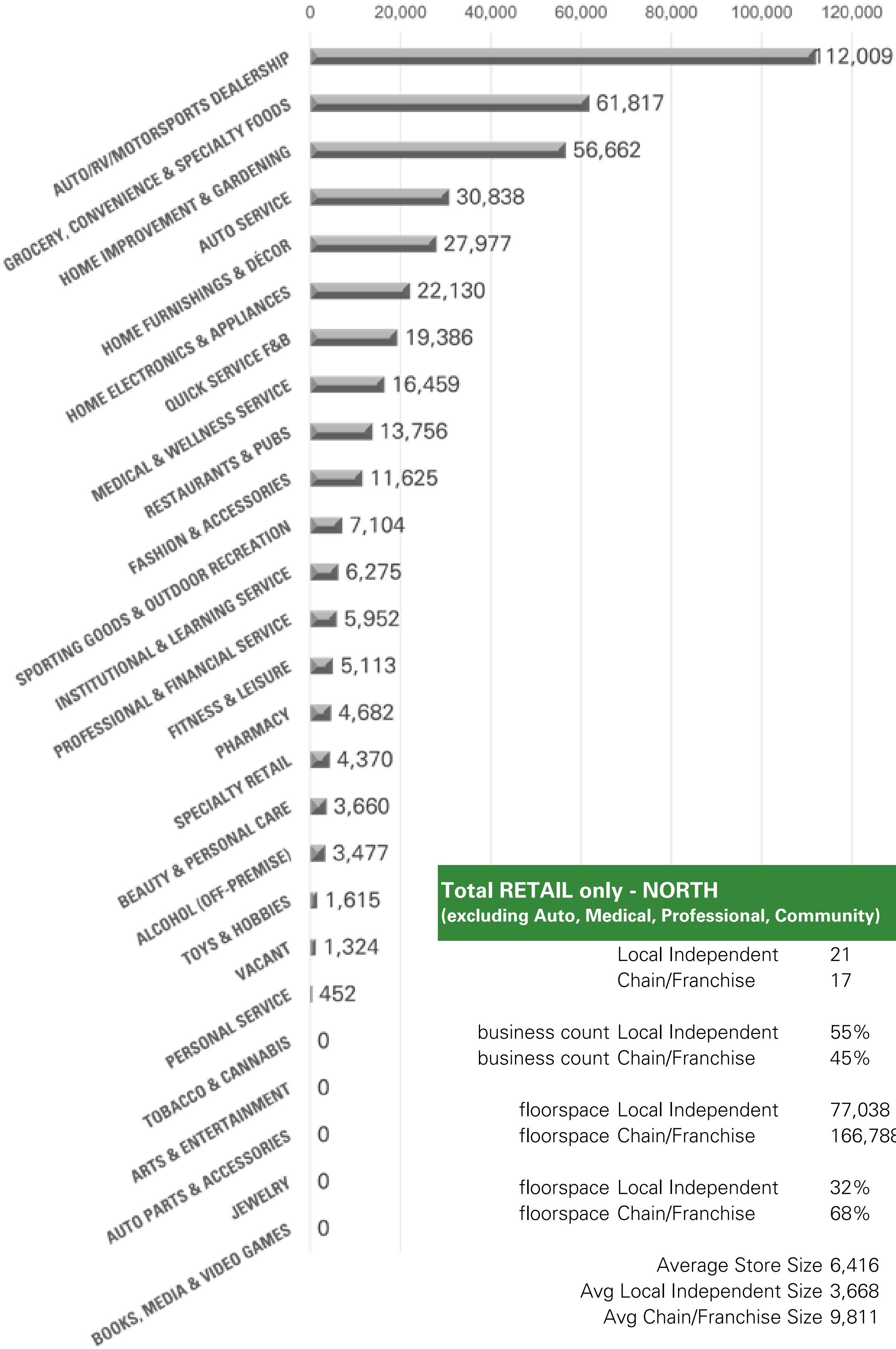


Table 4.5: North streetfront business inventory

MERCHANDISE CATEGORY	NORTH FLOORSPACE (sq. ft.)	NORTH MIX (%)	NORTH BUSINESS COUNT
AUTO/RV/MOTORSPORTS DEALERSHIP	112,009	26.9%	7
GROCERY, CONVENIENCE & SPECIALTY FOODS	61,817	14.8%	4
HOME IMPROVEMENT & GARDENING	56,662	13.6%	5
AUTO SERVICE	30,838	7.4%	3
HOME FURNISHINGS & DÉCOR	27,977	6.7%	2
HOME ELECTRONICS & APPLIANCES	22,130	5.3%	1
QUICK SERVICE F&B	19,386	4.7%	7
MEDICAL & WELLNESS SERVICE	16,459	4.0%	6
RESTAURANTS & PUBS	13,756	3.3%	3
FASHION & ACCESSORIES	11,625	2.8%	2
SPORTING GOODS & OUTDOOR RECREATION	7,104	1.7%	1
INSTITUTIONAL & LEARNING SERVICE	6,275	1.5%	2
PROFESSIONAL & FINANCIAL SERVICE	5,952	1.4%	4
FITNESS & LEISURE	5,113	1.2%	2
PHARMACY	4,682	1.1%	1
SPECIALTY RETAIL	4,370	1.0%	1
BEAUTY & PERSONAL CARE	3,660	0.9%	4
ALCOHOL (OFF-PREMISE)	3,477	0.8%	1
TOYS & HOBBIES	1,615	0.4%	1
VACANT	**1,324**	**0.3%**	2
PERSONAL SERVICE	452	0.1%	1
AUTO PARTS & ACCESSORIES	0	0.0%	0
ARTS & ENTERTAINMENT	0	0.0%	0
JEWELRY	0	0.0%	0
BOOKS, MEDIA & VIDEO GAMES	0	0.0%	0
TOBACCO & CANNABIS	0	0.0%	0
General Merchandise			*2*
TOTAL	**416,683**		**62**
Retail ONLY Floorspace (excl Medical & Wellness, Professional, Auto Service & Vacant)	243,826	**59%**	38
Total Estimated Retail Sales (excl Medical & Wellness, Professional, Auto Service & Vacant)	**$70,953,523**		
Estimated Retail Sales Productivity ($/sf)	**$291**		

Figure 4.12: North streetfront business inventory



Total RETAIL only - NORTH (excluding Auto, Medical, Professional, Community)			
	Local Independent	21	38
	Chain/Franchise	17	
business count	Local Independent	55%	
business count	Chain/Franchise	45%	
floorspace	Local Independent	77,038	243,826
floorspace	Chain/Franchise	166,788	
floorspace	Local Independent	32%	
floorspace	Chain/Franchise	68%	
	Average Store Size	6,416	
	Avg Local Independent Size	3,668	
	Avg Chain/Franchise Size	9,811	

Retail node (4) – South

This cluster of retail includes the concentration of arterial retail uses centred on the southeastern end of Territorial Drive around where it meets Railway Avenue. This cluster sits roughly equidistance between Downtown North Battleford and the Parsons Industrial Park, drawing from a wide regional trade area by way of Territorial Drive, Highway 40, and Highway 16 (Yellowhead Highway). The inventory is documented in **Figures 4.13 and 4.14,** and **Table 4.6**.

Commercial uses within this node, as illustrated in **Figure 4.13**, take the form of highway-commercial-style building typologies including strip malls and freestanding buildings with expansive parking setbacks. In addition, this cluster includes the Frontier Centre, one of North Battleford's two enclosed malls. Adjacent to the Frontier Centre is a hotel and freestanding Canadian Tire store. The largest single commercial use in this cluster is Walmart, accounting for approximately 135,000 sf.

Referring to **Figure 4.14**, the mix of the South node's retail shows the most prominent share of branded retailers, driven by the highest asking lease rates in the market. In the South node, the ratio of businesses is 23% local to 77% brands while the ratio in terms of floorspace is 8% to 92%. This breakdown is driven by the larger anchor tenants in the area, most notably Walmart, Canadian Tire, Sport Chek, Shoppers Drug Mart, Dollarama, Dollar Tree, Staples, and No Frills, among others.

With a very strong branded retail offering and mix that has convenient and highly visible access, as well as direct adjacencies to multiple hotels, the retail sales productivity of the South node is unsurprisingly the best performing retail node at almost $350 per sf ($341).

The South node has a total streetfront floor area of 416,683 sf. Existing retail amounts to 243,826 sf or 59% of the space (i.e. excluding health care and medical services, professional and financial services, community services, auto service, vacant space, and other non-retail uses).

The top retail categories by floor area are:

1. Grocery, Convenience & Specialty Foods (87,594 sf)
2. Home Improvement & Gardening (69,162 sf)
3. Fashion & Accessories (59,672 sf)
4. Restaurants & Pubs (36,684 sf)
5. Quick Service F&B (32,748 sf)

The above mix is also supplemented by a strong contingent of many comparison or Department Style Merchandise such as Home Furnishings, Beauty & Personal Care, Pharmacy, and Sporting Goods.

Referring to **Table 4.6,** vacancy in the area is estimated at 10.5%, comprising 12 vacancies in a variety of formats and locations (8 of which are in the Frontier Centre mall). The current vacancy includes the former Peavey Mart store (27,717 sf), which would be an ideal location for either a Value Village or Winners/Marshalls concept. If excluding Peavey Mart from the vacancy estimates, the vacancy rate would drop to 5.9% which would be relatively healthy for the node. The former Gamex Bingo building, located on the south side of Railway Avenue away from the principal concentration of businesses, has been excluded from the vacancy estimates for the South node as it is seen to be more of a light industrial use than retail.

Figure 4.13: Retail node (4) – South

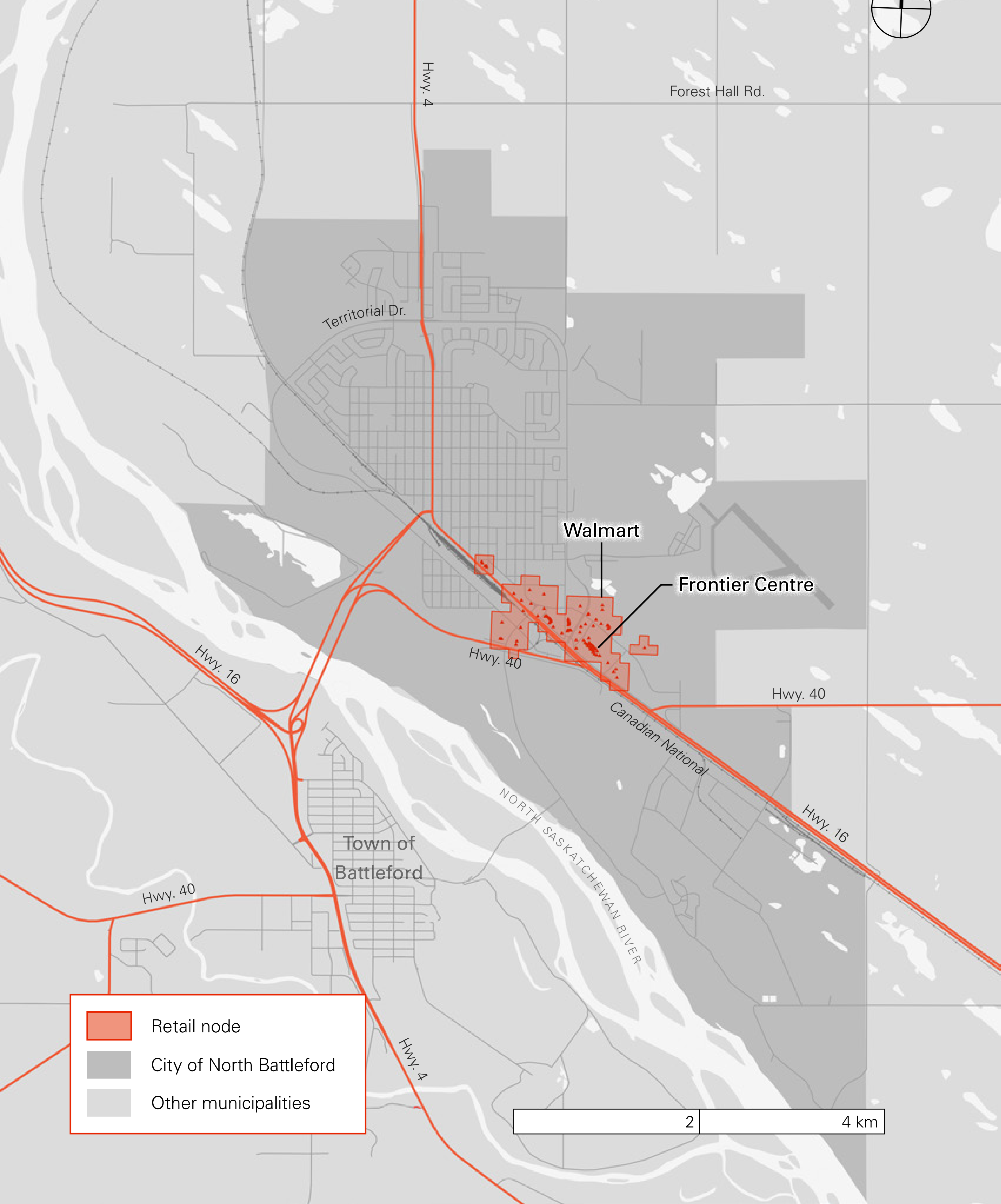
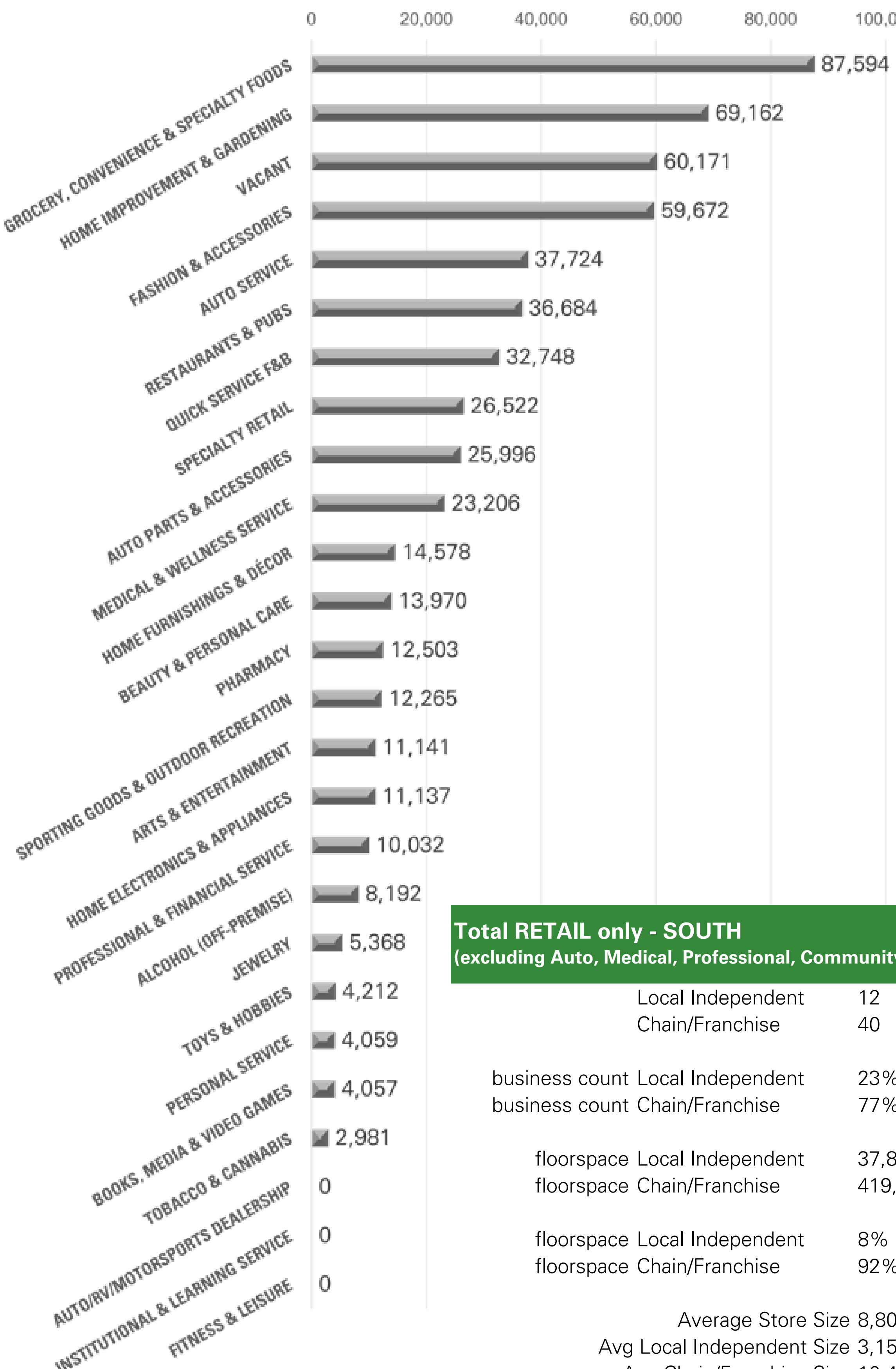


Table 4.6: South streetfront business inventory

MERCHANDISE CATEGORY	SOUTH FLOORSPACE (sq. ft.)	SOUTH MIX (%)	SOUTH BUSINESS COUNT
GROCERY, CONVENIENCE & SPECIALTY FOODS	87,594	15.3%	4
HOME IMPROVEMENT & GARDENING	69,162	12.0%	1
VACANT	**60,171**	**10.5%**	12
FASHION & ACCESSORIES	59,672	10.4%	5
AUTO SERVICE	37,724	6.6%	2
RESTAURANTS & PUBS	36,684	6.4%	11
QUICK SERVICE F&B	32,748	5.7%	14
SPECIALTY RETAIL	26,522	4.6%	2
AUTO PARTS & ACCESSORIES	25,996	4.5%	1
MEDICAL & WELLNESS SERVICE	23,206	4.0%	4
HOME FURNISHINGS & DÉCOR	14,578	2.5%	0
BEAUTY & PERSONAL CARE	13,970	2.4%	2
PHARMACY	12,503	2.2%	0
SPORTING GOODS & OUTDOOR RECREATION	12,265	2.1%	0
ARTS & ENTERTAINMENT	11,141	1.9%	1
HOME ELECTRONICS & APPLIANCES	11,137	1.9%	0
PROFESSIONAL & FINANCIAL SERVICE	10,032	1.7%	5
ALCOHOL (OFF-PREMISE)	8,192	1.4%	2
JEWELRY	5,368	0.9%	1
TOYS & HOBBIES	4,212	0.7%	0
PERSONAL SERVICE	4,059	0.7%	0
BOOKS, MEDIA & VIDEO GAMES	4,057	0.7%	0
TOBACCO & CANNABIS	2,981	0.5%	2
AUTO/RV/MOTORSPORTS DEALERSHIP	0	0.0%	0
INSTITUTIONAL & LEARNING SERVICE	0	0.0%	0
FITNESS & LEISURE	0	0.0%	0
General Merchandise			*7*
TOTAL	**573,974**		**76**
Retail ONLY Floorspace (excl Medical & Wellness, Professional, Auto Service & Vacant)	416,845	**73%**	52
Total Estimated Retail Sales (excl Medical & Wellness, Professional, Auto Service & Vacant)	**$142,277,540**		
Estimated Retail Sales Productivity ($/sf)	**$341**		

Figure 4.14: South streetfront business inventory



Total RETAIL only - SOUTH
(excluding Auto, Medical, Professional, Community)

	Local Independent	12	52
	Chain/Franchise	40	
business count	Local Independent	23%	
business count	Chain/Franchise	77%	
floorspace	Local Independent	37,858	457,674
floorspace	Chain/Franchise	419,816	
floorspace	Local Independent	8%	
floorspace	Chain/Franchise	92%	
	Average Store Size	8,801	
	Avg Local Independent Size	3,155	
	Avg Chain/Franchise Size	10,495	

Retail node (5) – East

Retail node 5, illustrated in **Figure 4.15**, includes retail near the eastern portion of Territorial Drive. This includes an older strip mall on St. Laurent Dr (at Douglas Ave) and a new urban reserve commercial node under development by Red Pheasant Cree Nation at the corner of Territorial Dr and 15th Ave, which includes the Eagles Landing development. Eagles Landing began leasing in 2024. The inventory is documented in **Figures 4.15 and 4.16,** and **Table 4.7**.

Referring to **Figure 4.16**, the mix of the East node's retail is less applicable as the node is in the early stages of development and only has 24 retail units, 14 of which are new and actively being leased (at the time of project fieldwork). Early indications are that Eagles Landing will have a notable branded contingent based on the presence of Starbucks and Tommy Gun's Barbershop, combined with what will likely be lease rates suitable for new construction.

The newness of the node and attraction of higher profile new-to-market retailers bodes well for the retail sales productivity of the growing East node, for which estimates currently average $200 per sf, but will likely increase to approximately $275 to $300 per sf as the project leases to new and attractive retailers.

The East node has a current total streetfront floor area of 41,060 sf. Existing retail amounts to 24,036 sf. As the larger Eagles Landing phases are introduced, the East node will gain in prominence as a new retail node, particularly if and as new residential development comes on line in the area.

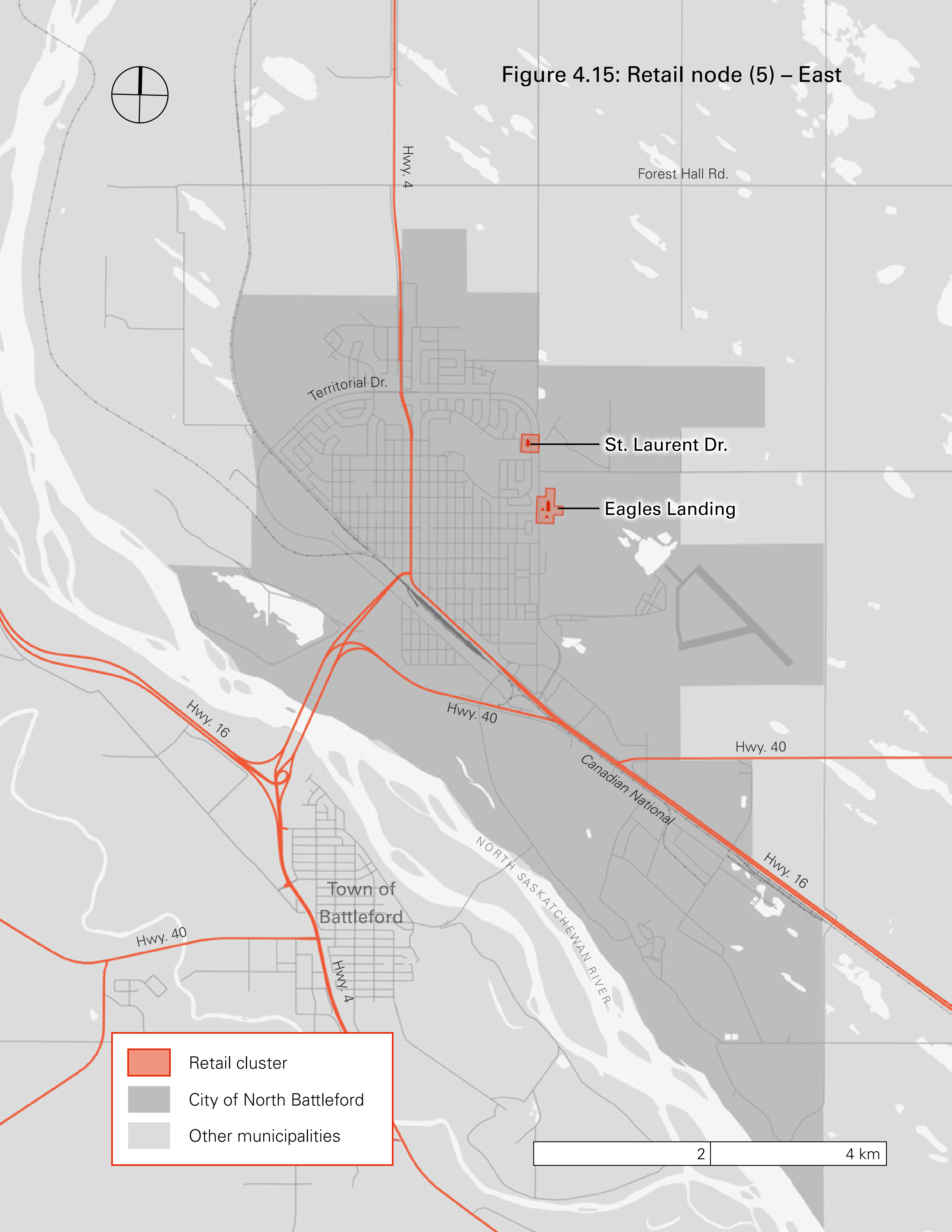
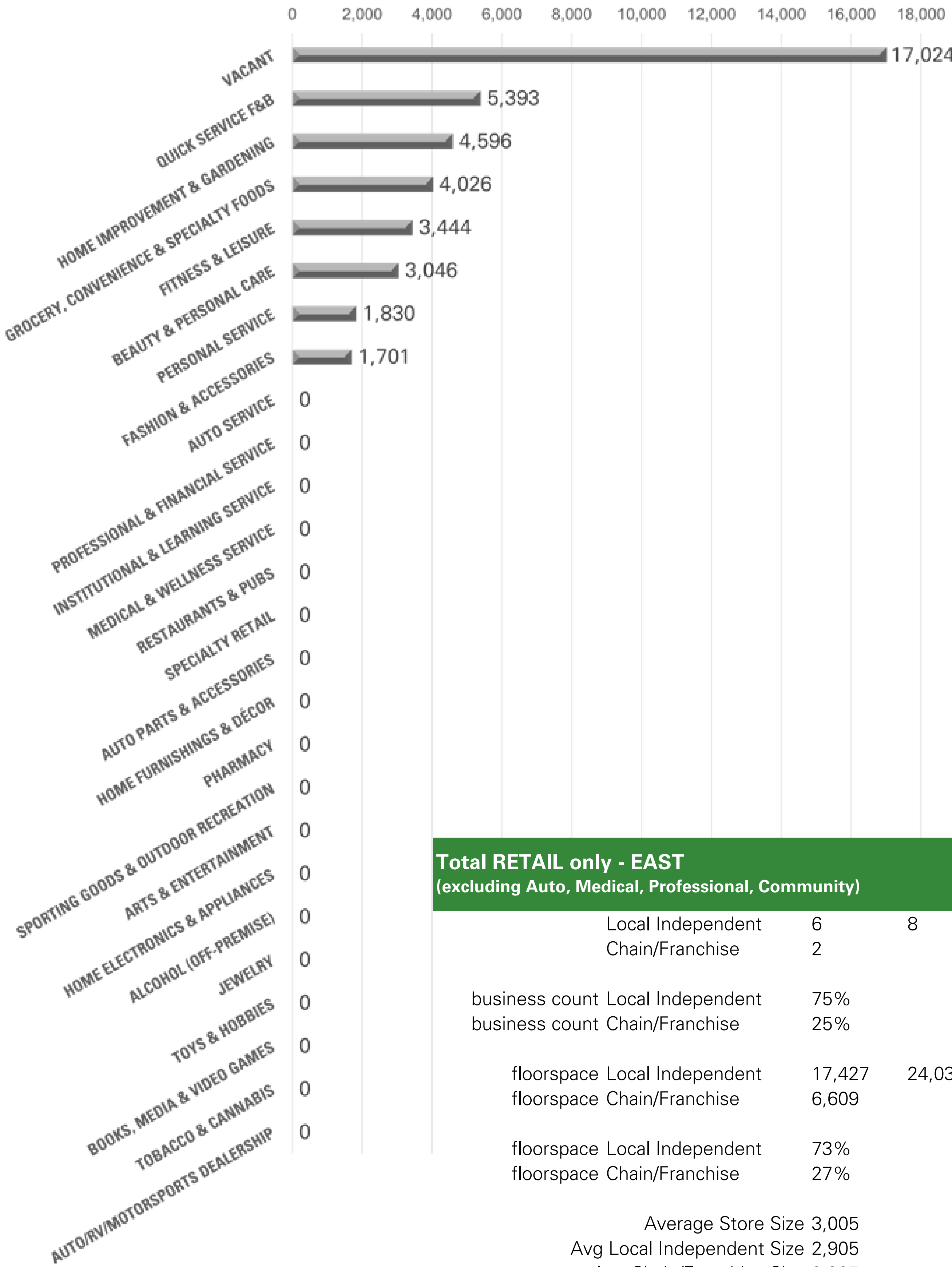


Figure 4.15: Retail node (5) – East
Forest Hall Rd.
Hwy. 4
Territorial Dr.
St. Laurent Dr.
Eagles Landing
Hwy. 16
Hwy. 40
Hwy. 40
Canadian National
Hwy. 16
NORTH SASKATCHEWAN RIVER
Town of Battleford
Hwy. 40
Hwy. 4
Retail cluster
City of North Battleford
Other municipalities
2
4 km

Table 4.7: East streetfront business inventory

MERCHANDISE CATEGORY	EAST FLOORSPACE (sq. ft.)	EAST MIX (%)	EAST BUSINESS COUNT
VACANT	**17,024**	**41.5%**	14
QUICK SERVICE F&B	5,393	13.1%	1
HOME IMPROVEMENT & GARDENING	4,596	11.2%	1
GROCERY, CONVENIENCE & SPECIALTY FOODS	4,026	9.8%	2
FITNESS & LEISURE	3,444	8.4%	1
BEAUTY & PERSONAL CARE	3,046	7.4%	2
PERSONAL SERVICE	1,830	4.5%	1
FASHION & ACCESSORIES	1,701	4.1%	1
AUTO/RV/MOTORSPORTS DEALERSHIP	0	0.0%	0
AUTO SERVICE	0	0.0%	0
HOME FURNISHINGS & DÉCOR	0	0.0%	0
HOME ELECTRONICS & APPLIANCES	0	0.0%	0
MEDICAL & WELLNESS SERVICE	0	0.0%	0
RESTAURANTS & PUBS	0	0.0%	0
SPORTING GOODS & OUTDOOR RECREATION	0	0.0%	0
INSTITUTIONAL & LEARNING SERVICE	0	0.0%	0
PROFESSIONAL & FINANCIAL SERVICE	0	0.0%	0
PHARMACY	0	0.0%	0
SPECIALTY RETAIL	0	0.0%	0
ALCOHOL (OFF-PREMISE)	0	0.0%	0
TOYS & HOBBIES	0	0.0%	0
AUTO PARTS & ACCESSORIES	0	0.0%	0
ARTS & ENTERTAINMENT	0	0.0%	0
JEWELRY	0	0.0%	0
BOOKS, MEDIA & VIDEO GAMES	0	0.0%	0
TOBACCO & CANNABIS	0	0.0%	0
General Merchandise			*0*
TOTAL	**41,060**		**23**
Retail ONLY Floorspace (excl Medical & Wellness, Professional, Auto Service & Vacant)	24,036	**59%**	9
Total Estimated Retail Sales (excl Medical & Wellness, Professional, Auto Service & Vacant)	**$4,831,547**		
Estimated Retail Sales Productivity ($/sf)	**$201**		

Figure 4.16: East streetfront business inventory



Total RETAIL only - EAST
(excluding Auto, Medical, Professional, Community)

	Local Independent	6	8
	Chain/Franchise	2	
business count	Local Independent	75%	
business count	Chain/Franchise	25%	
floorspace	Local Independent	17,427	24,036
floorspace	Chain/Franchise	6,609	
floorspace	Local Independent	73%	
floorspace	Chain/Franchise	27%	
	Average Store Size	3,005	
	Avg Local Independent Size	2,905	
	Avg Chain/Franchise Size	3,305	

Retail node (6) – Neighbourhood

Retail node 6, shown in **Figure 4.17,** includes neighbourhood retail – smaller-scale shops and plazas – located in predominantly residential neighbourhoods to the east and west of Downtown North Battleford. This includes single buildings on 10th and 11th Aves, several shops on 110th St (opposite North Battleford Comprehensive High School), and commercial units on 16th Ave and 91st St.

Referring to **Figure 4.18**, the mix of the neighbourhood nodes, as expected, is largely premised on local independent businesses with lower sales productivities averaging $162 per sf.

The East node has a current total streetfront floor area of 37,726 sf. Existing retail amounts to 11,560 sf.

Figure 4.17: Retail node (6) – Neighbourhood

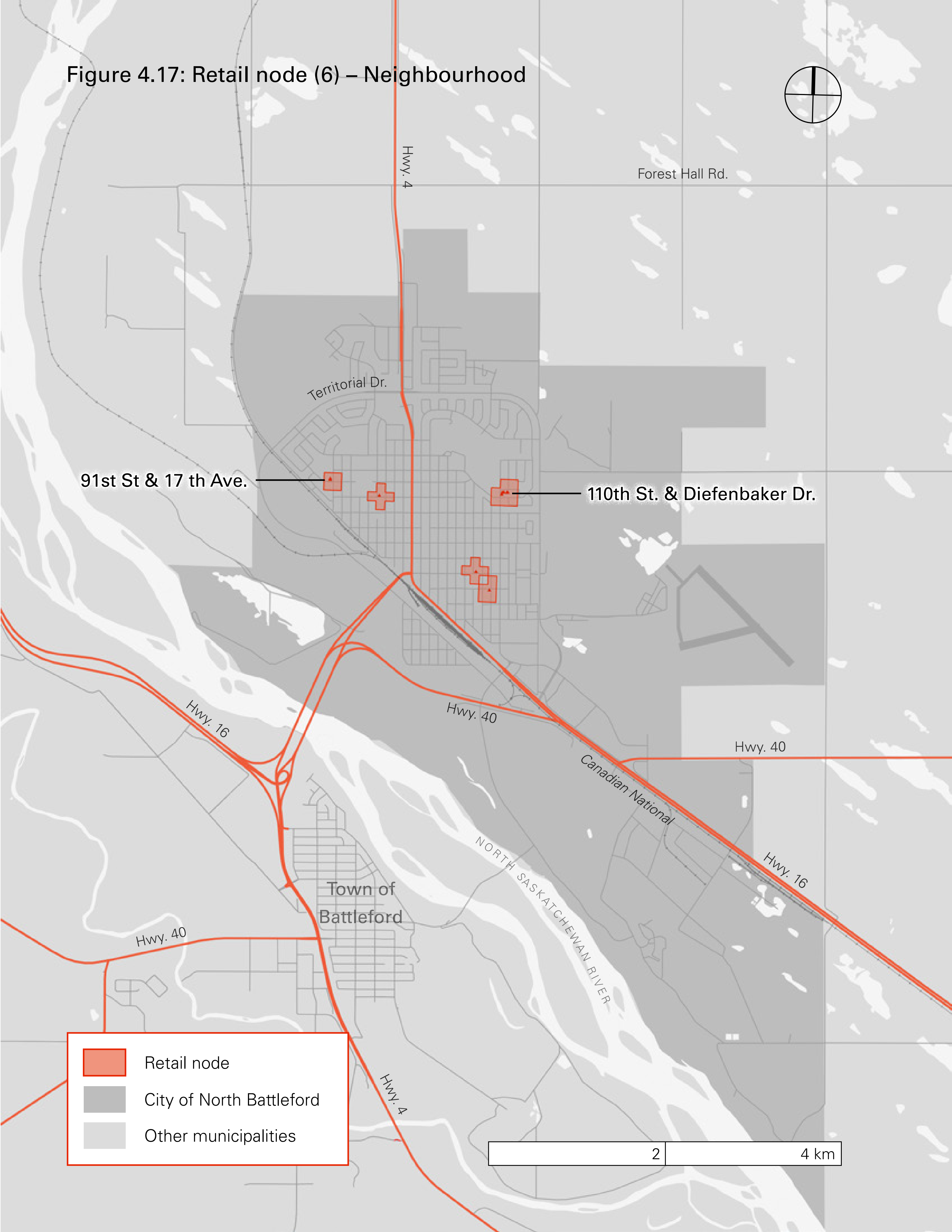
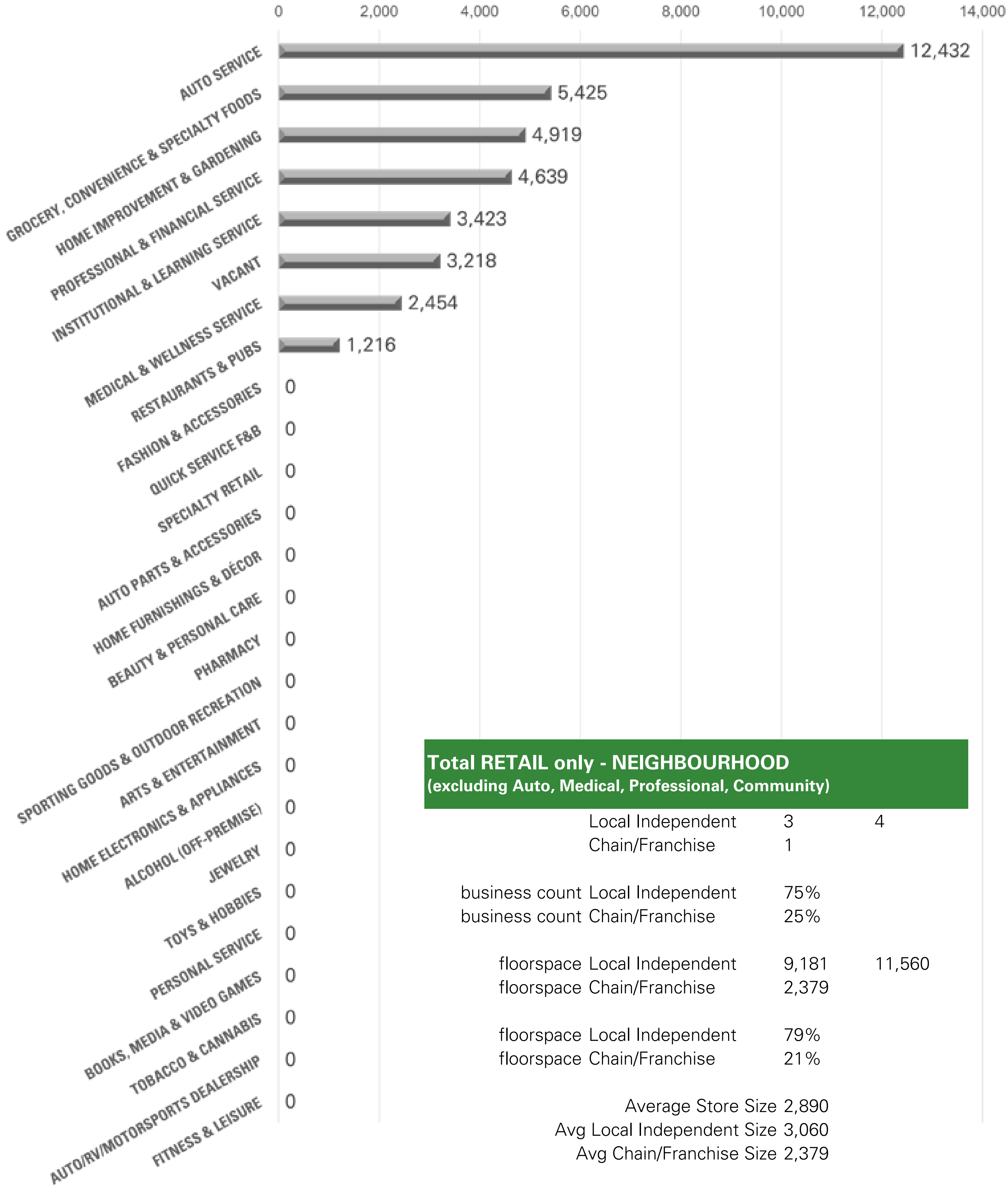


Table 4.8: Neighbourhood streetfront business inventory

MERCHANDISE CATEGORY	N'HOOD FLOORSPACE (sq. ft.)	N'HOOD MIX (%)	N'HOOD BUSINESS COUNT
AUTO SERVICE	12,432	33.0%	1
GROCERY, CONVENIENCE & SPECIALTY FOODS	5,425	14.4%	2
HOME IMPROVEMENT & GARDENING	4,919	13.0%	1
PROFESSIONAL & FINANCIAL SERVICE	4,639	12.3%	1
INSTITUTIONAL & LEARNING SERVICE	3,423	9.1%	1
VACANT	**3,218**	**8.5%**	1
MEDICAL & WELLNESS SERVICE	2,454	6.5%	1
RESTAURANTS & PUBS	1,216	3.2%	1
QUICK SERVICE F&B	0	0.0%	0
FITNESS & LEISURE	0	0.0%	0
BEAUTY & PERSONAL CARE	0	0.0%	0
PERSONAL SERVICE	0	0.0%	0
FASHION & ACCESSORIES	0	0.0%	0
AUTO/RV/MOTORSPORTS DEALERSHIP	0	0.0%	0
HOME FURNISHINGS & DÉCOR	0	0.0%	0
HOME ELECTRONICS & APPLIANCES	0	0.0%	0
SPORTING GOODS & OUTDOOR RECREATION	0	0.0%	0
PHARMACY	0	0.0%	0
SPECIALTY RETAIL	0	0.0%	0
ALCOHOL (OFF-PREMISE)	0	0.0%	0
TOYS & HOBBIES	0	0.0%	0
AUTO PARTS & ACCESSORIES	0	0.0%	0
ARTS & ENTERTAINMENT	0	0.0%	0
JEWELRY	0	0.0%	0
BOOKS, MEDIA & VIDEO GAMES	0	0.0%	0
TOBACCO & CANNABIS	0	0.0%	0
General Merchandise			0
TOTAL	**37,726**		**9**
Retail ONLY Floorspace (excl Medical & Wellness, Professional, Auto Service & Vacant)	11,560	**31%**	4
Total Estimated Retail Sales (excl Medical & Wellness, Professional, Auto Service & Vacant)	**$1,875,066**		
Estimated Retail Sales Productivity ($/sf)	**$162**		

Figure 4.18: Neighbourhood streetfront business inventory



Total RETAIL only - NEIGHBOURHOOD
(excluding Auto, Medical, Professional, Community)

	Local Independent	3	4
	Chain/Franchise	1	
business count	Local Independent	75%	
business count	Chain/Franchise	25%	
floorspace	Local Independent	9,181	11,560
floorspace	Chain/Franchise	2,379	
floorspace	Local Independent	79%	
floorspace	Chain/Franchise	21%	
	Average Store Size	2,890	
	Avg Local Independent Size	3,060	
	Avg Chain/Franchise Size	2,379	

North Battleford - a closer look

- *city currently retains just over 45% of the available trade area spending*
- *grocery & specialty foods captures almost 75% of the trade area spending*
- *future demand based on maintaining or increasing overall market share or retail spending could result in 230,000 sf to 350,000 sf of new retail space over next decade.*
- *factoring current vacancies, net new demand should be in range of 150,000 sf to 275,000 sf over next decade with possible land absorption in range of 7.5 to 17 acres comprising mix of redevelopment, infill and greenfield sites.*

5.0 market demand analysis

5.0 Market demand analysis

5.1 Introduction

The following section will assess the amount of supportable retail floorspace in the City of North Battleford premised on estimates of the current market share of total available retail spending by the existing trade area as well as miscellaneous spending. This process will forecast demand in terms of both floorspace (square footage) and land (acres) to provide a basis for future land-use planning in North Battleford.

5.2 Methodology

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

However, in secondary or rural markets - and since population growth in North Battleford is expected to take place at a modest rate - an alternative approach to demand forecasting is applied. Demand forecasts are predicated on past population projections that did not show significant population growth, and therefore can be considered conservative in their outlook.

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

A sounding board for retail productivities are the lease rates which are estimated to be in the range of $10 - $15 per sf in the Downtown node, $25 - $30 at Eagles Landing in the East node, and in the range of $20 - $35 in the South node, particularly where the newer retail has been established as the prime retail destination for new-to-market retailers.

On this basis, it is estimated that retail sales productivities in the community would average in the $175 to $300 per sf range with the possible exception of day-to-day conveniences which could be in the range of $400 to $600 per sf.

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

5.3 Demand based on existing market shares

The results of this approach are shown in **Tables 5.1, 5.2 and 5.3,** which quantify the total estimated market share of retail spending in North Battleford's Trade Area. **Table 5.2** reveals that the city currently retains just over 45% of the available Trade Area spending. This means that almost 55% of the resident Trade Area spending is spent outside of the community in competing regions like Lloydminster or Saskatoon. As a comparison, similar sized communities elsewhere in the prairies typically see a retention rate range of 40% to 45% where a trade area is around the 50,000 person benchmark.

The estimated market shares reveal that a category such as Grocery & Specialty Foods is capturing almost 75% of the Trade Area spending, which is very strong and supported by the mix and distribution of retailers such as Co-op, Sobeys, Walmart, and No Frills.

As North Battleford continues to grow at conservative rates, there are opportunities to deepen the market penetration and market capture of trade area spending that emphasizes the beneficial geographic positioning of North Battleford, even in the face of other strong competitive areas like Lloydminster, which benefits from its lack of a provincial sales tax. That said, North Battleford is the centrality to a well-established and recognized retail trade area.

To illustrate the impact on future demand in North Battleford, **Tables 5.2 and 5.3** illustrate the amount of future demand that could be possible simply based on maintaining the *current* market shares and sales productivity.

The results of this forecast are summarized in **Table 5.1** and reveal that by 2034, North Battleford could support approximately 230,000 sf of additional new retail space.

The biggest challenge for North Battleford lies in its higher than average vacancy, which includes two notable approximate 20,000 sf spaces, which should be prioritized for backfilling. When considering the current higher vacancy in the city, estimated at almost 170,000 sf, it is reasonable and realistic to suggest that the net amount of new floorspace in the city may not be 230,000 sf, but rather somewhere in the range of 150,000 sf that takes into account the retenanting of existing vacancies in the market.

Because North Battleford already performs well in the conveniences and day-to-day goods/services segment, future demand is not as robust as in other areas, whereby 45,000 sf of future new space could be supported.

Within this latter figure, specific demand for grocery could be 32,000 sf which could be filled by a grocery concept like FreshCo, which would work well with the current Sobeys location and give them a foot-in-the-door with their value price point format.

This would be an ideal target for Eagles Landing as it looks to develop its next phases.

Home furnishings as well as appliances are well-represented in North Battleford but could potentially be further enhanced by attracting a retailer like JYSK who recently opened a new-to-market store in Wetaskiwin, Alberta.

Table 5.1: Estimated Retail Demand Summary 2024 to 2034 (Based on Maintaining *Current* Market Share)

(Source: FBM & Manifold Data Mining Inc.)

EXISTING MARKET SHARE SCENARIO

	2034 to 2034	
Retail Merchandise Category	**Current Retail Inventory (sf)**	**Total Future NEW Demand (sf)**
Convenience & Day-to-Day Goods/Services	239,611	46,507
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	508,538	97,083
Leisure, Recreation & Entertainment Goods/Services	248,027	47,435
Automotive Goods (excluding repair)	157,671	38,156
Total (sf)	**1,153,846**	**229,181**

Table 5.2: Estimated Market Share Retention of Retail Spending in North Battleford, 2024

(Source: FBM & Manifold Data Mining Inc.)

Retail Spending by Merchandise Category		2024 NORTH BATTLEFORD Est Sales Productivity ($psf)	TRADE AREA Estimated Market Share	Market Share Sales $	Current Retail Floorspace (sf)
Convenience & Day-to-Day Goods/Services	Grocery & Specialty Foods	$553	74%	$93,426,514	168,937
	Pharmacy	$620	51%	$15,911,010	25,646
	Alcohol (off-premise)	$414	77%	$5,409,975	13,068
	Tobacco & Cannabis	$333	78%	$3,227,325	9,687
	Personal Services	$128	12%	$2,855,701	22,272
	Health Care & Medical (not applicable)				
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	$212	68%	$21,606,760	101,931
	Jewelry	$320	67%	$1,719,648	5,368
	Beauty & Personal Care	$147	62%	$7,698,797	52,462
	Home Furniture & Décor	$203	50%	$10,647,259	52,436
	Appliances & Electronics	$315	81%	$16,843,351	53,403
	Home Improvement & Gardening	$201	58%	$27,672,857	137,782
	Books & Media	$176	5%	$715,696	4,057
	Sporting Goods	$157	74%	$3,534,719	22,469
	Toys & Hobbies	$126	93%	$981,803	7,796
	Specialty Retail	$150	48%	$10,617,585	70,834
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	$327	85%	$27,078,909	82,704
	Restaurants & Pubs	$259	56%	$22,440,994	86,789
	Arts & Entertainment	$126	75%	$6,637,542	52,474
	Fitness & Leisure	$98	39%	$2,565,281	26,060
Automotive Goods (excluding repair)	Auto Parts & Accessories	$114	20%	$5,199,145	45,662
	Auto/RV/Motorsports Dealerships	$300	39%	$33,602,700	112,009
	Auto Fuel (not applicable)				
	TOTAL RETAIL CATEGORIES ONLY	**$278**	**45.6%**	**$320,393,570**	**1,153,846**
	TOTAL (excluding Health Care & Auto)	**$283**	**61.0%**	**$281,591,725**	**996,175**

Table 5.3: Estimated Retail Demand by 2034 (Based on Maintaining *Current* Market Share)

(Source: FBM & Manifold Data Mining Inc.)

		2034			
	Retail Spending by Merchandise Category	**NORTH BATTLEFORD Est Sales Productivity ($psf)**	**NORTH BATTLEFORD Estimated Market Share**	**Market Share Sales $**	**Total New Retail Floorspace (sf)**
Convenience & Day-to-Day Goods/Services	Grocery & Specialty Foods	$553	74%	$111,559,978	32,790
	Pharmacy	$620	51%	$18,999,231	4,978
	Alcohol (off-premise)	$414	77%	$6,460,015	2,536
	Tobacco & Cannabis	$333	78%	$3,853,727	1,880
	Personal Services	$128	12%	$3,409,973	4,323
	Health Care & Medical (not applicable)				
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	$212	68%	$25,713,348	19,373
	Jewelry	$320	67%	$2,044,461	1,014
	Beauty & Personal Care	$147	62%	$9,162,033	9,971
	Home Furniture & Décor	$203	50%	$12,685,876	10,040
	Appliances & Electronics	$315	81%	$20,068,325	10,225
	Home Improvement & Gardening	$201	58%	$32,971,342	26,381
	Books & Media	$176	5%	$850,663	765
	Sporting Goods	$157	74%	$4,206,528	4,270
	Toys & Hobbies	$126	93%	$1,168,404	1,482
	Specialty Retail	$150	48%	$12,650,520	13,562
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	$327	85%	$32,334,745	16,052
	Restaurants & Pubs	$259	56%	$26,706,136	16,495
	Arts & Entertainment	$126	75%	$7,899,076	9,973
	Fitness & Leisure	$98	39%	$3,049,046	4,914
Automotive Goods (excluding repair)	Auto Parts & Accessories	$114	20%	$6,341,979	10,037
	Auto/RV/Motorsports Dealerships	$300	39%	$42,038,393	28,119
	Auto Fuel (not applicable)				
	TOTAL RETAIL CATEGORIES ONLY	**$278**	**45.8%**	**$384,173,801**	**229,181**
	TOTAL (excluding Health Care & Auto)	**$230**	**52.9%**	**$272,613,823**	**191,025**

The area of most opportunistic growth, with a forecast of almost 97,000 sf, could lie in the comparison or Department Store Type Merchandise (DSTM) categories which could include notable retailers like Winners, Marshalls, Value Village, or Goodwill.

Similarly, leisure and recreation uses could be filled by targeting concepts like Goodlife (and its smaller version Fit4Less), Planet Fitness, or SNAP Fitness.

For the Restaurant sector, which is still somewhat in flux as it continues to recover from the COVID-19 pandemic, is nonetheless illustrative of future growth, most likely to be in the form of new-to-market branded or franchise food & beverage formats, such as Original Joe's, IHOP, and Carl's Jr.

For the purposes of longer term planning, it could be reasonable to expect 10 to 15 acres of potential retail development over the next decade to meet future retail demand. This assumes that new floorspace would be allocated across a combination of new development, most likely at Eagles Landing in the East node and in lands behind the Frontier Centre in the South node, as well as some in the North node. The Downtown and Downtown North nodes would likely see limited new growth other than in existing vacant redeveloped lots.

5.4 Demand based on increased market shares

Looking at *current* market shares is only one possible approach to projecting demand. There is an alternative direction for North Battleford's retail opportunity that lies in incrementally increasing the overall market share of sales, while still being cognizant of the fact that drive times to larger markets like Lloydminster and Saskatoon will still prevail for many bigger ticket items.

Tables 5.4 and 5.5 provide a forecast of future demand in terms of floorspace and land based on applying an *increase* of approximately 4% to 5% market share across all categories. While reality may dictate that some categories may not necessarily need to increase their market share, others may seek to increase more than 5%; the overall impact of the increase is that which is considered important in this analysis.

If the retained market shares presented previously in **Table 5.2** were to *increase* by an overall 4% by 2034 (to 49%), the total demand by the year 2034 - based on conservative population growth but with spending growth and increased retention - could result in incremental growth in new space of approximately +/-355,000 sf, or 125,000 sf more than if the current market shares are maintained.

Like the previous scenario, however, vacancy absorption would need to be factored into any future demand. Therefore, it would be reasonable to forecast that under an *increased* market share scenario, future demand could still be in the range of 275,000 sf.

Under either scenario, North Battleford has demand and support for conservatively +/-150,000 to 275,000 sf if one considered an average of the two scenarios.

If a 4% increase in market share demand was achieved, convenience and day-to-day goods and services would be almost 60,000 sf. Within those categories, a sub-category like Grocery could be 37,500 sf, which would still be more than enough for a freestanding larger grocery anchor (e.g. Save-on-Foods or Canadian Wholesale).

Another goal should also be to ensure that existing businesses are in a strong position to increase their market share and resulting sales and profitability. This is particularly important for local independent retailers in areas like the Downtown because the entry of new, more recognized retailers can have a short term impact on local businesses that sell similar products or services. Strong retailers, however, are able to raise their bar to meet competition and can benefit from the bigger draw that new retailers can have for a community like North Battleford.

It may be worth considering that the City establish a 'shop local' program as has been done in other communities, where concerns over Downtown health and vitality must be balanced against the needs and expressed desires of new-to-market tenants who may looking to growth into or near to new nodes like Eagles Landing. In 2021, the Battlefords Chamber of Commerce commissioned a study by Praxis to understand the impact of a 10% shift in shopping local, which can be viewed here: *https://battlefordschamber.com/chamber_news/economic_impact_study.html.*

Retail growth is not always about adding new retail, but rather creating an environment for stronger retention and performance of existing businesses. North Battleford, like many similar markets across the prairies, is a market that has a stable and strong trade area, with room for growth.

The retail demand forecasts suggest a good opportunity for future retail for which there are tenants capable of further enhancing North Battleford's retail presence in the region as a strong secondary market to the two larger nearby markets. While the geographic location of North Battleford has enabled the City to be a self-sufficient secondary regional market with an established retail trade area, the nature of competition with Lloydminster and Saskatoon means that North Battleford should continue to market itself within its existing trade area, while emphasizing the importance of re-establishing, re-tooling, and re-defining its Downtown vibrancy.

Table 5.4: Estimated Retail Demand Summary 2024 to 2034 (Based on *Increasing Current* Market Share)

(Source: FBM & Manifold Data Mining Inc.)

FUTURE MARKET SHARE SCENARIO		2034 to 2034
Retail Merchandise Category	**Current City Retail Inventory (sf)**	**Total Future NEW Demand (sf)**
Convenience & Day-to-Day Goods/Services	239,611	59,978
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	508,538	159,160
Leisure, Recreation & Entertainment Goods/Services	248,027	77,720
Automotive Goods (excluding repair)	157,671	58,228
Total (sf)	**1,153,846**	**355,086**

Table 5.5: Estimated Retail Demand by 2034 (Based on *Increasing Current* Market Share)

(Source: FBM & Manifold Data Mining Inc.)

Retail Spending by Merchandise Category		2034 NORTH BATTLEFORD Est Sales Productivity ($psf)	NORTH BATTLEFORD Estimated Market Share	Market Share Sales $	Total New Retail Floorspace (sf)
Convenience & Day-to-Day Goods/Services	Grocery & Specialty Foods	$553	81%	$114,176,406	37,521
	Pharmacy	$620	56%	$19,403,113	5,629
	Alcohol (off-premise)	$414	85%	$6,840,214	3,455
	Tobacco & Cannabis	$333	87%	$6,263,561	9,113
	Personal Services	$128	13%	$3,401,947	4,260
	Health Care & Medical (not applicable)				
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	$212	74%	$28,348,967	31,807
	Jewelry	$320	73%	$2,254,018	1,668
	Beauty & Personal Care	$147	68%	$10,101,141	16,370
	Home Furniture & Décor	$203	56%	$13,986,178	16,444
	Appliances & Electronics	$315	89%	$22,125,328	16,747
	Home Improvement & Gardening	$201	64%	$36,350,905	43,208
	Books & Media	$176	5%	$937,856	1,259
	Sporting Goods	$157	82%	$4,637,698	7,011
	Toys & Hobbies	$126	103%	$1,288,166	2,433
	Specialty Retail	$150	53%	$13,947,198	22,213
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	$327	93%	$35,649,056	26,175
	Restaurants & Pubs	$259	62%	$29,443,515	27,082
	Arts & Entertainment	$126	82%	$8,708,731	16,374
	Fitness & Leisure	$98	43%	$3,361,573	8,089
Automotive Goods (excluding repair)	Auto Parts & Accessories	$114	22%	$6,992,032	15,746
	Auto/RV/Motorsports Dealerships	$300	44%	$46,347,328	42,482
	Auto Fuel (not applicable)				
	TOTAL RETAIL CATEGORIES ONLY	**$275**	**49.5%**	**$414,564,932**	**355,086**
	TOTAL (excluding Health Care & Auto)	**$279**	**65.6%**	**$361,225,571**	**296,857**

5.5 Future Land Needs & Allocation

The demand figures shown in **Tables 5.1 and 5.4** provide guidance for retail growth in North Battleford over the next 10 years, with an eye to how future development could or should proceed over the longer term and as planning and economic development strategies evolve.

Table 5.4: North Battleford Retail Demand Allocation Estimates by Node to 2034

(Source: FBM & Manifold Data Mining Inc.)

Total 10-yr New Demand by 2034 with CURRENT Market Share & Nodal Allocation (sf / acres)			North Battleford % Share of Demand	Share of Demand (sf)	Site Coverage Ratio	Net Land Area (acres)
Total	**229,181**	**11.1**	**100%**	**229,181**	**0.48**	**11.1**
		Net demand		149,181	0.5	7.4
		Vacancy Factor		80,000	0.5	3.7
		Downtown BID	5%	7,459	0.8	0.2
		Downtown North	0%	0	0.5	0.0
		North	25%	37,295	0.3	2.9
		South	40%	59,673	0.3	4.6
		East	30%	44,754	0.3	3.4

Total 10-yr New Demand by 2034 with INCREASED Market Share & Nodal Allocation (sf / acres)			North Battleford % Share of Demand	Share of Demand (sf)	Site Coverage Ratio	Net Land Area (acres)
Total	**355,086**	**16.7**	**100%**	**355,086**	**0.40**	**20.4**
		Net demand		275,086	0.4	16.7
		Vacancy Factor		80,000	0.5	3.7
		Downtown BID	5%	13,754	0.8	0.4
		Downtown North	0%	0	0.5	0.0
		North	25%	68,771	0.3	5.3
		South	40%	110,034	0.3	8.4
		East	30%	82,526	0.3	6.3

With conservative population increases, combined with marginal increase in overall market share of trade area spending, North Battleford could add to its net new retail inventory by anywhere from 150,000 sf to 275,000 sf in specifically targeted categories or business types by 2034, depending upon how the area is marketed by the municipality and businesses-alike. Combined with new-to-market retailers, this could still leave sufficient demand and opportunities for a continued mix of locally curated retail concepts.

That being said, sometimes competition is necessary to ensure that spending is retained in the community and in many cases a new competitor can increase overall spending and retention.

In the case of North Battleford, the current market share rate of 45% may seem low but in fact the strong rural regional draw that the city exhibits suggests that the market is capable of increasing its market penetration by adding compatible new-to-market retailers.

The prospects of new retail are favourable for being drawn predominantly to Eagles Landing in the East node. Conditions are also favourable north of the Frontier Centre in the South node, where other new-to-market brands have recently opened (or are soon-to-open) and where land is investment-ready to build.

With respect to land needs, the range of 7.5 to 17 acres could be viewed as most aggressive and as not all needing to be new greenfield development. It would be expected that development would also be comprised of redevelopment and infill as well as greenfield sites.

North Battleford - a closer look

- *retail demand forecasts suggest opportunity for future retail and tenants capable of moving the needle for sales retention and attraction.*
- *sampling of priority near-term target retail opportunities include Winners, Mary Brown's, Value Village, Planet Fitness, Supplement King, Global Pet Foods VineCo, Original Joe's, JYSK, IHOP*
- *retail growth for North Battleford should be premised not on the quantity of retail, but rather the quality of the retail offering so that businesses can succeed.*
- *housing mix must be prioritized within and near Downtown to ensure retail is supported and economically viable for building owners and tenants.*

6.0
key findings

6.0 Key findings

6.1 Introduction

North Battleford, while struggling with some vacancy challenges, nonetheless offers an opportune retail environment underpinned by its strategic location and rural regional influence. With modest consumer demand and a supportive community framework, the city is well-positioned for targeted retail growth, making it an attractive destination for targetted retailers and investors alike.

North Battleford's trade area extends beyond its immediate CMA population, drawing consumers from an estimated trade area catchment of over 40,000 people. This catchment extends to smaller, underserved outlying communities like Spiritwood, Blaine Lake, Fielding, Cando, Wilbert, Paynton, and Turtleford. Residents from these areas, and many local indigenous communities, rely on North Battleford for many goods and services.

This latter statement is validated by the significant amount of retail in the community (996,000 sf) compared to the CMA's population base (20,736). When figures like this exist, it clearly shows a broader opportunity and resulting drivers necessary for success.

6.2 Developing Successful Retail

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

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

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

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

To help build this statistical foundation, North Battleford was analyzed in detail to illustrate and document the following statistical facts:

- Geographic delineation of the retail trade area that reflects a realistic drive time or market penetration;
- Demographic and economic profiles of the trade area population;

- Growth projections for the trade area population;
- Annual retail spending;
- Sales performance of key retail categories;
- Current estimated retained market share of trade area spending; and
- Current and future 10-year supportable retail space.

Retail Development Fundamentals

Retail development, including that in smaller secondary communities such as those found throughout the prairies, is driven by critical business fundamentals that must be acknowledged and considered when identifying retail opportunities.

By way of a checklist, these include:

- Population characteristics of the consumer base;
- The reality that retail follows consumers;
- Consistent and high shopper traffic is a prerequisite for most retailers;
- The consumer base must demonstrate sufficient buying power to be of interest to retailers;
- Chain retailers have a limited number of prototypical store formats that they are willing to operate. Deviating from these established formats is done only as a last resort in circumstances where demand for a location by a retailer or developer is high;
- Most retailers require sites with convenient access, high visibility, and ample parking;
- Most retailers expand in well-defined geographic areas that coincide with their distribution networks and their familiarity with consumer preferences;
- Most retailers have established criteria for site selection as far as population thresholds for new market or multi-store locations. For example, Bulk Barn tends to look at local markets with a minimum of 25,000 people, usually within an urban setting or reasonable drive time. This, however, typically applies to a local segment for whom regular and frequent patronage is expected, particularly for day-to-day types of convenience goods and services. In a general sense for a more remote or secondary market, this benchmark would apply to a 15-30 minute drive time and would be dependent upon the level of competition in a respective market.
- Clustering of compatible retailers is a norm;
- Retailers cannot generally survive rent-to-sales ratios in excess of 15%. Retailers have a threshold level of sales they know they must achieve to be profitable; and
- Retailers attempt to maximize profitability by operating the fewest number of stores possible in any market to avoid sales transference.

6.3 Importance of a Balanced Retail Hierarchy to Community Economic Health

A well-planned retail hierarchy as presented in **Figures 7.1 and 7.2** ensures that businesses of all sizes, especially local, independent ones, can thrive. Main streets and downtowns, like that in North Battleford, are critical for incubating and supporting small businesses, while larger retail nodes or corridors accommodate the broader desired and necessary branded national chains and larger format retailers. This balance helps keep local dollars circulating within the community and provides diverse shopping options for residents.

Figure 7.2 illustrates an overall healthy retail hierarchy that takes into account multiple attributes that further speak to the magnitude of retail opportunity. In the context of North Battleford, the diagram highlights where the community currently sits in this hierarchy, in which there is an essential and central role for the Downtown around which all other retail emanates.

North Battleford's Downtown is critical for fostering community cohesion, social interaction, and civic engagement by creating public spaces where residents gather. Events, public spaces, and a mix of retail, dining, and entertainment can help strengthen community ties.

Downtown is the "heart" of the community, where people come together for shared experiences.

Importantly, a thoughtful retail hierarchy helps prevent sprawl, as best as possible. Main streets, mixed-use developments, and traditional downtowns encourage walkability and reduce car dependency. As shown in **Figure 7.2,** relative to each retail format, walkability becomes even stronger when more housing is developed within, adjacent to, or in direct proximity of these types of essential community centres. This leads to more sustainable, eco-friendly growth that can rediscover and redefine North Battleford's character while accommodating expansion or intensification of retail in strategic and compatible areas, and could include possible institutional or community spaces in the Downtown as well.

A healthy retail environment is essential to ensure that North Battleford is attractive to existing and particularly new residents and businesses. Main streets and vibrant downtowns, with their unique shops and public spaces, appeal to people looking for a sense of community.

Meanwhile, larger and emerging nodes provide the convenience and variety that businesses and residents seek, making the town an attractive place to live and invest.

6.4 Benefits of Housing Diversity for Retail Ecosystem

Across the retail industry, the adage "retail follows rooftops" has proven to be true. In the case of North Battleford's growth as a city, this adage also rings true. However, over time, as retail became more prominent across the city and in the broader region (specifically in Lloydminster), the influence of nearby residential support for the Downtown has declined because the amount of adjacent residential and overall housing mix still reflects a time when Downtown was the core retail location.

This is why the amount and type of housing mix must continue to be prioritized within and near to the Downtown to ensure that the current amount of retail floorspace and retail opportunity can be supported and economically viable for the business owners and operators.

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

A diverse housing stock can lead to increased overall spending in local businesses as different groups of people have different consumption habits and preferences.

Table 7.1: Relationship of Retail Formats to Population and Trade Area Size
(Source: FBM)

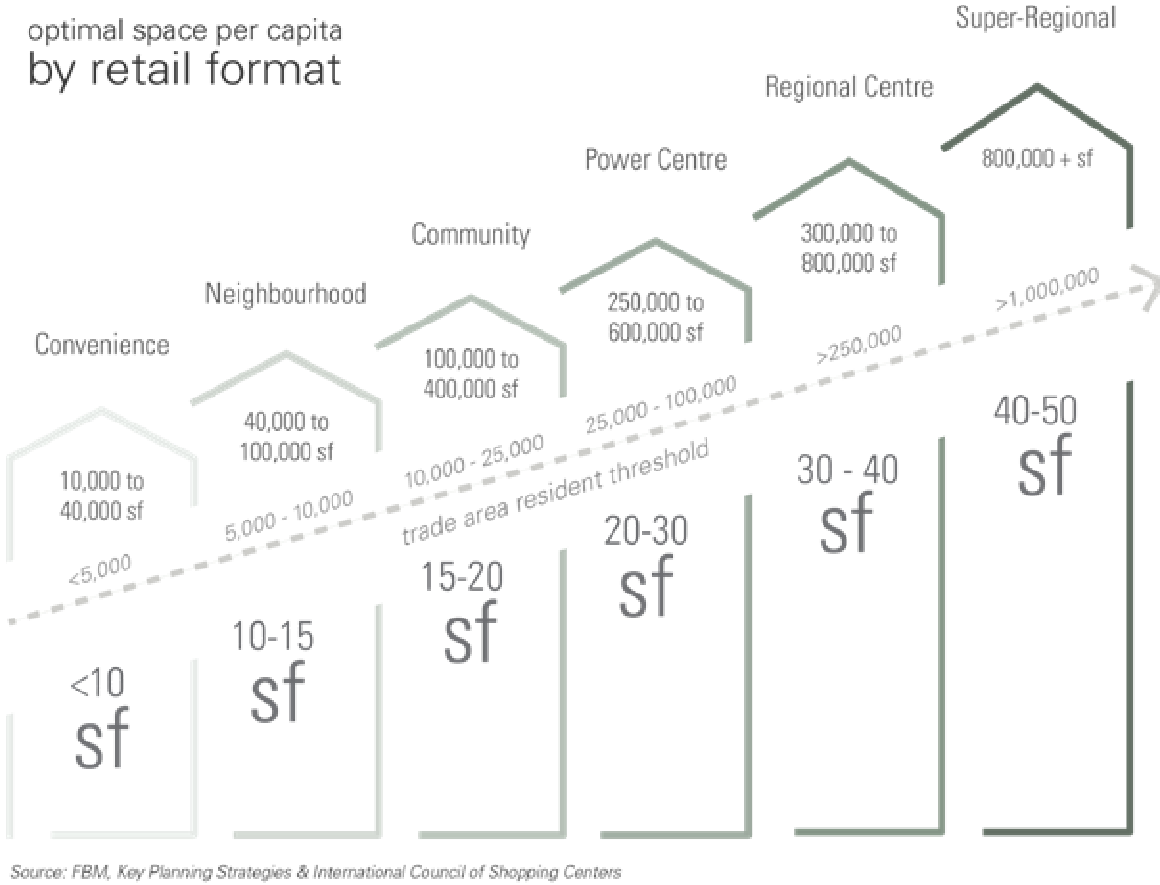
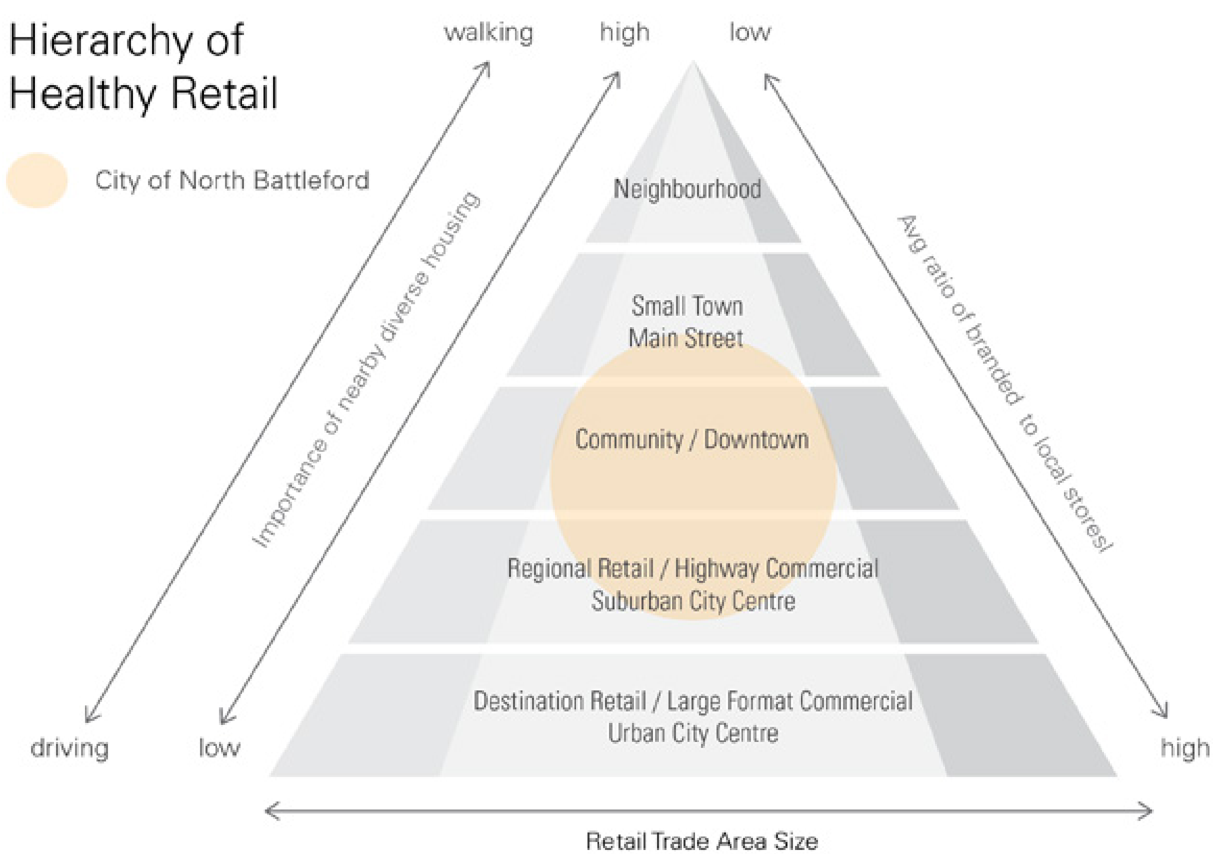


Table 7.2: Hierarchical Relationship of a Healthy Retail Community
(Source: FBM)



This blending of consumer segments also creates a wider and more varied customer base, supporting local retail by ensuring a steady and diverse stream of consumers. Retailers benefit from having customers with different needs and purchasing capacities, helping to stabilize sales across economic cycles.

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

Overall, the retail hierarchy as presented in **Figure 7.2** with the presence of a downtown like North Battleford's, must be considered one of its most valuable assets, and essential to the economic, social, and cultural health of the community. New businesses often prefer to set up shop in vibrant, diverse communities where a mix of people live and work. A healthy Downtown provides a framework for orderly development, supports the local economy, and fosters strong community ties, contributing to the City's overall economic vitality and sustainability.

7.6 Target Retail Opportunities

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

While there is no guarantee, the current retail market is absent of a few immediate opportunities for whom vacancies and/or land exists. The marketing message needs to be clear and real in terms of the market opportunity.

Persistence is also critical when many brands may not be "ready at this time" for a rural or secondary market, as opposed to a focus on "larger, more urban" markets.

Retail growth for North Battleford should be premised not on the quantity of retail, but rather the quality of the retail offering so that businesses can succeed. A mix of brands as shown here as well as a new strong local business such as another Brewery-type licensed, full-service establishment would respond well to consumer desires and sentiments.

The retail demand forecasts suggest a good opportunity for future retail and there are tenants capable of moving the needle for sales retention and attraction in North Battleford. Most notably, these include, but are not limited to the retailers identified in **Table 7.3** representing near (<5 years) to medium (5 to 10 years) target retail brand or franchise prospects. The retailers identified in the table does not mean that all of those in respective merchandise category segments could be accommodated, but rather, they represent retailers for whom the market is a fit. It is most likely that if one or two of the retailers are first to the opportunity, others may choose to pursue other locations. An example of this could be Mary Brown's versus Popeye's Louisana Chicken, or Planet Fitness versus SNAP Fitness.

Similarly, there are tenants and formats more often generated by local independent entrepreneurs also capable of moving the needle for sales retention and attraction in North Battleford. A broader compatibility perspective is presented in **Table 7.4,** showing possible merchandise category segments to which local or other brand/franchises may be applicable. While some categories like Home Furnishings may show as "low" given the current inventory, there still may be specifcally targeted retailers that could further solidify the North Battleford market as the go-to for home decor. Overall, though, those categories with "moderate" or "high" represent the more prominent opportunities over time.

Table 7.3: Target Retail Brand/Franchise Opportunities and Timeline

(Source: FBM)

Retailer (Brand / Franchise)	Merchandise Category Segment	Time Horizon Near Term 2025 to 2030	Time Horizon Long Term 2030 to 2035 +
VineCo	Alcohol, Tobacco & Cannabis	✓	
Vintners Cellar	Alcohol, Tobacco & Cannabis		✓
Wine Kitz	Alcohol, Tobacco & Cannabis	✓	
Brown's Social House	F&B Restaurant - Full Service		✓
Canadian Brewhouse	F&B Restaurant - Full Service		✓
IHOP	F&B Restaurant - Full Service	✓	
Original Joe's	F&B Restaurant - Full Service	✓	
Ricky's All Day Grill	F&B Restaurant - Full Service	✓	
State & Main Kitchen	F&B Restaurant - Full Service		✓
Swiss Chalet	F&B Restaurant - Full Service	✓	
Carl's Jr	F&B Restaurant - Quick Service		✓
Cora's	F&B Restaurant - Quick Service	✓	
Fatburger	F&B Restaurant - Quick Service	✓	
Firehouse Subs	F&B Restaurant - Quick Service	✓	
Five Guys Burger & Fries	F&B Restaurant - Quick Service		✓
Fresh Slice Pizza	F&B Restaurant - Quick Service	✓	
Good Earth Coffee	F&B Restaurant - Quick Service		✓
Harvest Eats	F&B Restaurant - Quick Service		✓
Jersey Mike's Subs	F&B Restaurant - Quick Service	✓	
Mary Browns	F&B Restaurant - Quick Service	✓	
Mezza Lebanese	F&B Restaurant - Quick Service		✓
Mucho Burrito	F&B Restaurant - Quick Service	✓	
Oodle Noodle	F&B Restaurant - Quick Service	✓	
Opa	F&B Restaurant - Quick Service	✓	
Osmow's	F&B Restaurant - Quick Service	✓	
Popeye's	F&B Restaurant - Quick Service	✓	
Second Cup	F&B Restaurant - Quick Service		✓
Taco Bell	F&B Restaurant - Quick Service	✓	
Wok Box	F&B Restaurant - Quick Service	✓	
Marshall's	Fashion, Footwear & Accessories	✓	
Winners	Fashion, Footwear & Accessories	✓	
Fit4Less Fitness (by Goodlife)	Fitness & Leisure		✓
Planet Fitness	Fitness & Leisure	✓	
SNAP Fitness	Fitness & Leisure	✓	
Goodwill Donation Centre	General Merchandise	✓	
Real Canadian Superstore	General Merchandise		✓
Real Canadian Wholesale	General Merchandise		✓
Value Village	General Merchandise	✓	
Cobs Bread	Grocery & Specialty Foods	✓	
FreshCo	Grocery & Specialty Foods		✓
Save on Foods	Grocery & Specialty Foods		✓
JYSK	Home Furnishings & Décor	✓	
Sleep Country Canada	Home Furnishings & Décor		✓
Martinizing Dry Cleaning	Personal Service	✓	
First Choice Haircutter	Personal Service	✓	
Popeye's Supplements	Specialty Retail	✓	
Supplement King	Specialty Retail	✓	
Global Pet Foods	Specialty Retail	✓	
Petland	Specialty Retail		✓

Table 7.4: Merchandise Category Target Opportunities in North Battleford

(Source: FBM)

Store/Merchandise Category	Description	Range of Store Sizes (sf)	Target Consumer Segment	Overall Opportunity Based on Existing Inventory (Low / Moderate / High)	Target Node	Timing < 5 yrs 5 to 10 yrs
Boutique Clothing Stores	Independent fashion retailers offering unique, high-quality apparel for men, women, or children.	800 - 2,500	Style-conscious consumers, families, young professionals	Moderate	Downtown South East	5 to 10 yrs
Specialty Food Stores and Coop type Grocery	Local grocers or gourmet food shops offering organic, ethnic, or artisanal products.	1,000 - 3,000	Food enthusiasts, health-conscious individuals, ethical consumers, families, seniors	Low	Downtown East	5 to 10 yrs
Health & Wellness Stores	Focused on natural health products, vitamins, supplements, and wellness services.	1,000 - 2,000	Fitness enthusiasts, health-conscious individuals	High	Downtown South East	< 5 yrs
Home Décor & Furniture	Stores featuring unique furniture, home accents, and seasonal décor.	1,500 - 5,000	Homeowners, interior design enthusiasts	Low	South	5 to 10 yrs
Outdoor Recreation Stores	Retailers offering gear and apparel for camping, hiking, cycling, and outdoor activities.	2,000 - 4,000	Outdoor enthusiasts, families, adventure seekers	Moderate	South	< 5 yrs
Specialty Sports Stores	Retailers specializing in sports equipment and apparel for niche markets (e.g., hockey, soccer) including used or consignment product	2,000 - 4,000	Athletes, families, sports enthusiasts	Moderate	Downtown North	5 to 10 yrs
Pet Supply Stores	Specialty stores providing high-quality pet food, toys, and grooming services.	1,000 - 3,000	Pet owners, families	Moderate	South East	< 5 yrs
Books & Hobbies	Bookshops or stores catering to hobbies such as crafting, model building, or board games.	1,000 - 2,500	Students, hobbyists, families	Moderate	Downtown	5 to 10 yrs
Craft Breweries/Cideries/ Distilleries	Local craft beer, cider, or spirits producers with retail and tasting options.	2,000 - 4,000	Young adults, professionals, food & beverage enthusiasts	High	Downtown East	< 5 yrs
Art Galleries/Studios	Spaces selling local artwork or offering art classes and workshops.	1,000 - 2,500	Art enthusiasts, families, tourists, home-based businesses	Low	Downtown	5 to 10 yrs
Fitness Studios	Specialized fitness facilities offering yoga, pilates, spin, or martial arts classes.	1,500 - 3,000	Fitness enthusiasts, families, young professionals	Moderate	Downtown South East	< 5 yrs
Child Enrichment Centers	Businesses focusing on educational toys, books, and extracurricular activities for kids.	1,000 - 3,000	Parents, families	Moderate	North East	5 to 10 yrs
Technology/Gadget Stores	Stores offering electronics, smart devices, and accessories.	1,000 - 2,500	Tech-savvy individuals, students, professionals	Low	Downtown	5 to 10 yrs
Local Cafés & Bakeries	Unique coffee shops and bakeries offering local flavors and community space.	800 - 2,000	Coffee lovers, professionals, students, families	Moderate	Downtown Neighbourhood	< 5 yrs
Ethnic Fare Restaurants & Bistros		1,250 - 2,000	Foodies, families, seniors, students, home-based businesses	High	Downtown South East	< 5 yrs
Vintage/Thrift Stores	Second-hand shops with curated vintage or gently used items.	1,500 - 3,000	Bargain hunters, eco-conscious shoppers, students	High	Downtown North	< 5 yrs

North Battleford

Retail Gap Analysis

Appendices

APPENDIX A: Detailed Retail Inventory

TENANT NAME	UNIT #	CIVIC STREET #	STREET ADDRESS	NODE	SUB-NODE (if applicable)	RETAIL MERCHANDISE or BUSINESS CATEGORY	SIZE (sq. ft.)
Access Communications Co-operative		1192	99 St	Downtown BID		Institutional & learning service	5,630
Alfa Cell Phone and Computer Repair		1102	102 St	Downtown BID		Home Electronics & Appliances	1,216
Aurora Boutique		1011	103 St	Downtown BID		Beauty & Personal Care	1,604
Autumn and Ash		1132	100 St	Downtown BID		Home Furnishings & Décor	1,862
Battlefords Dental		1251	100 St	Downtown BID		Medical & wellness service	3,025
Battlefords District Food and Resource Centre Food Bank		1171	101 St	Downtown BID		Institutional & learning service	3,724
Battlefords Family Health Centre		1192	101 St	Downtown BID		Medical & wellness service	2,153
Battlefords Immigration Resource Centre		761	106 St	Downtown BID		Institutional & learning service	3,014
Battlefords Medical Centre		1121	103 St	Downtown BID		Medical & wellness service	786
Battlefords Pediatric Clinic		1241	100 St	Downtown BID		Medical & wellness service	2,874
Battlefords Prescription Centre		1121	103 St	Downtown BID		Pharmacy	743
Beaver Beverage Room		1102	100 St	Downtown BID		Full Service F&B	3,186
BeePlus Workplace Solutions		901	103 St	Downtown BID		Specialty Retail	13,799
Bill & Don's		1232	101 St	Downtown BID		Fashion & Footwear	2,745
Blade and Brush Barbers		1270	100 St	Downtown BID		Beauty & Personal Care	2,562
BMO Bank of Montreal		1152	101 St	Downtown BID		Professional & financial service	4,575
Boutique Noir		1361	100 St	Downtown BID		Fashion & Footwear	2,260
Bumper to Bumper (Sutherland Automotive)		1242	102 St	Downtown BID		Auto Parts & Accessories	12,099
Cafe 4 U		1141	101 St	Downtown BID		Full Service F&B	2,045
Canada Post		1242	100 St	Downtown BID		Institutional & learning service	4,101
Capitol Theatre		1091	100 St	Downtown BID		Arts & Entertainment	13,767
Capitol Theatre		1101	100 St	Downtown BID		Arts & Entertainment	5,909
Careica Health	A	1225	100 St	Downtown BID		Medical & wellness service	1,130
Carousel Bingo	101	1191	101 St	Downtown BID		Arts & Entertainment	8,234
Cash N Go Check Cashers		1091	102 St	Downtown BID		Professional & financial service	1,227
Catholic Family Services		1272	101 St	Downtown BID		Institutional & learning service	12,648
Cell Phone and Computer Repair		1242	101 St	Downtown BID		Specialty Retail	689
Cherry Insurance		1392	100 St	Downtown BID		Professional & financial service	2,454
CIBC Banking Centre		1262	101 St	Downtown BID		Professional & financial service	5,705
Craig's Boutique	C	1291	100 St	Downtown BID		Fashion & Footwear	1,227
CUPE Local 5430	A	1291	100 St	Downtown BID		Institutional & learning service	1,066
Cuts R Us		10206	11 Ave	Downtown BID		Beauty & Personal Care	2,250
Danish Home Bakery		1155	101 St	Downtown BID		Grocery, Convenience & Specialty Foods	2,400
Dejma's Curry House		1183	101 St	Downtown BID		Full Service F&B	1,389
Dental on Main		1341	100 St	Downtown BID		Medical & wellness service	1,593
Ditto		1117	101 St	Downtown BID		Personal Service	3,165
Dr. M.C. Khurana		1265	100 St	Downtown BID		Medical & wellness service	1,485
Dragon Palace		1292	101 St	Downtown BID		Full Service F&B	5,511
Eternal Memories Funeral Service and Crematorium		1332	100 St	Downtown BID		Personal Service	6,189
Fabricland		872	103 St	Downtown BID		Specialty Retail	5,296
First Financial		10020	14 Ave	Downtown BID		Professional & financial service	1,485
Flavours of Punjab		1102	102 St	Downtown BID		Full Service F&B	3,089
Fountain Tire		11101	110 St	Downtown BID		Auto Parts & Accessories	7,567
Four50 Grill		1102	99 St	Downtown BID		Full Service F&B	1,991
Free Spirit Salon Studio		10101	11 Ave	Downtown BID		Beauty & Personal Care	2,465
Freedom Skateboards and Snowboards		1318	100 St	Downtown BID		Sporting Goods & Outdoor Recreation	2,551
FT Second Hand		1072	102 St	Downtown BID		Specialty Retail	5,996
FYidoctors Parkview		1301	100 St	Downtown BID		Medical & wellness service	2,896
Great Wall Express		1082	102 St	Downtown BID		Full Service F&B	1,873
Gutters Bowling and Game Centre		1102	99 St	Downtown BID		Arts & Entertainment	13,423
H&R Block		1091	102 St	Downtown BID		Professional & financial service	1,485
HRO Chartered Professional Accountants		1321	100 St	Downtown BID		Professional & financial service	5,102
Hudec Law Office	101	1292	100 St	Downtown BID		Professional & financial service	2,433
Husky		792	105 St	Downtown BID		Auto Fuel	2,497
Husky (car wash)		792	105 St	Downtown BID		Auto Service	1,324
IDA Pharmacy		1192	101 St	Downtown BID		Pharmacy	2,282
Innovation Credit Union		1202	102 St	Downtown BID		Professional & financial service	9,106

TENANT NAME	UNIT #	CIVIC STREET #	STREET ADDRESS	NODE	SUB-NODE (if applicable)	RETAIL MERCHANDISE or BUSINESS CATEGORY	SIZE (sq. ft.)
Jasmine's Nails & Spa		1236	101 St	Downtown BID		Beauty & Personal Care	2,530
Jeans n Joggers		1165	101 St	Downtown BID		Fashion & Footwear	2,809
Kelly's Computer Works		1281	100 St	Downtown BID		Home Electronics & Appliances	3,854
KidsFirst Battlefords		1192	101 St	Downtown BID		Institutional & learning service	2,282
Kim's Barbershop		1291	100 St	Downtown BID		Personal Service	366
Klassy Kutts		1091	102 St	Downtown BID		Beauty & Personal Care	1,270
Lakeland Library Region		1302	100 St	Downtown BID		Institutional & learning service	4,058
Lifetime Fitness		982	102 St	Downtown BID		Fitness & Leisure	5,156
Linda's Northern Pawn		1080	100 St	Downtown BID		Specialty Retail	6,189
Liquor Store		992	101 St	Downtown BID		Alcohol (Off-Premise)	1,399
Medical Clinic	B	1225	100 St	Downtown BID		Medical & wellness service	1,335
Mennonite Community Closet		1252	100 St	Downtown BID		Fashion & Footwear	6,448
Miami Tanning and Clothing		1122	102 St	Downtown BID		Beauty & Personal Care	1,356
Midwest Food Resources		10202	11 Ave	Downtown BID		Institutional & learning service	1,604
Milbankes		1111	100 St	Downtown BID		Specialty Retail	5,253
Minute Muffler		80	Railway Ave E	Downtown BID		Auto Service	4,198
Moon's Kitchen		1126	100 St	Downtown BID		Full Service F&B	1,227
Moose Kebab and Shawarma		1202	100 St	Downtown BID		Limited Service F&B	689
NB Enviro Janitorial Supplies		1122	102 St	Downtown BID		Specialty Retail	474
NB Phone Depot	C	1225	100 St	Downtown BID		Home Electronics & Appliances	1,528
Nora's Store	A	1171	100 St	Downtown BID		Fashion & Footwear	947
North Battleford Taekwondo Academy		1106	101 St	Downtown BID		Fitness & Leisure	2,476
Northside Auto Service		972	103 St	Downtown BID		Auto Service	6,340
Northwest Optical		1245	100 St	Downtown BID		Medical & wellness service	2,863
Northwest Professional Services		1201	102 St	Downtown BID		Institutional & learning service	5,780
OK Tire		1001	102 St	Downtown BID		Auto Service	3,864
Pharmasave North Battleford		1271	100 St	Downtown BID		Pharmacy	1,550
Phill Asian Filipino Food Store		1157	100 St	Downtown BID		Grocery, Convenience & Specialty Foods	2,347
Platinum Salon and Spa		1141	103 St	Downtown BID		Beauty & Personal Care	1,938
Prairie Employment Program	B	1371	100 St	Downtown BID		Institutional & learning service	958
Profile Tax Services		1166	101 St	Downtown BID		Professional & financial service	1,798
RBC Royal Bank		1101	101 St	Downtown BID		Professional & financial service	3,832
RE/MAX of the Battlefords		1391	100 St	Downtown BID		Professional & financial service	1,711
Realty Executives		1371	100 St	Downtown BID		Professional & financial service	1,033
Reis Wealth Management		1125	101 St	Downtown BID		Professional & financial service	1,733
REX Spa and Studio		1102	102 St	Downtown BID		Beauty & Personal Care	1,625
Roche Beauty Company	202	872	103 St	Downtown BID		Beauty & Personal Care	3,326
Rockshop Cannabis	A	1221	101 St	Downtown BID		Tobacco & Cannabis	4,564
Royal Canadian Legion		1352	100 St	Downtown BID		Institutional & learning service	4,758
Sallows and McDonald		1271	103 St	Downtown BID		Personal Service	5,350
SaskTel Store (total building area is est 13,315 sf, but retail-only ie est at 2,000 sf)		1201	100 St	Downtown BID		Home Electronics & Appliances	2,000
Scotiabank		1102	101 St	Downtown BID		Professional & financial service	2,303
Shear Perfection	A	1371	100 St	Downtown BID		Beauty & Personal Care	667
Sidra Beauty Zone		1261	100 St	Downtown BID		Beauty & Personal Care	1,421
SIIT Career Centre		1301	100 St	Downtown BID		Institutional & learning service	2,605
Smith's Radiator Service		1021	102 St	Downtown BID		Auto Service	2,390
South Vietnam		1076	100 St	Downtown BID		Full Service F&B	3,703
Speedy Cash Payroll Advances		1185	101 St	Downtown BID		Professional & financial service	1,281
Stil		1221	101 St	Downtown BID		Fashion & Footwear	4,359
Studio B	B	1291	100 St	Downtown BID		Beauty & Personal Care	1,001
Styles By Gail	103B	1102	102 St	Downtown BID		Beauty & Personal Care	893
Svenkeson Allison and Associates		761	106 St	Downtown BID		Professional & financial service	1,862

TENANT NAME	UNIT #	CIVIC STREET #	STREET ADDRESS	NODE	SUB-NODE (if applicable)	RETAIL MERCHANDISE or BUSINESS CATEGORY	SIZE (sq. ft.)
Swanson Gryba and Company		1292	100 St	Downtown BID		Professional & financial service	4,187
Taste of Battleford		1102	100 St	Downtown BID		Full Service F&B	1,593
TD Canada Trust		1147	101 St	Downtown BID		Professional & financial service	3,305
The Keg Room		992	101 St	Downtown BID		Limited Service F&B	3,477
The Smith's Makeup Artistry and Photography		1122	102 St	Downtown BID		Beauty & Personal Care	635
Trifon's Pizza		1102	102 St	Downtown BID		Full Service F&B	3,186
Twin City Dental Clinic		1092	102 St	Downtown BID		Medical & wellness service	1,733
Twin City Medical Clinic		1102	103 St	Downtown BID		Medical & wellness service	3,154
Vacant		1102	100 St	Downtown BID		Vacant	1,055
Vacant		1142	100 St	Downtown BID		Vacant	1,916
Vacant		1152	100 St	Downtown BID		Vacant	2,056
Vacant		1165	100 St	Downtown BID		Vacant	2,820
Vacant		1191	100 St	Downtown BID		Vacant	2,056
Vacant		1322	100 St	Downtown BID		Vacant	1,819
Vacant		1121	101 St	Downtown BID		Vacant	2,562
Vacant		1131	101 St	Downtown BID		Vacant	2,648
Vacant		1132	101 St	Downtown BID		Vacant	3,735
Vacant		1132	101 St	Downtown BID		Vacant	3,305
Vacant		1072	102 St	Downtown BID		Vacant	1,701
Vacant		1292	102 St	Downtown BID		Vacant	1,130
Vacant		10040	12 Ave	Downtown BID		Vacant	2,067
Vacant (for lease)		1086	102 St	Downtown BID		Vacant	3,348
Vacant (for rent)		10030	12 Ave	Downtown BID		Vacant	2,164
Vacant (for sale)		1092	100 St	Downtown BID		Vacant	5,716
Vacant **(former B&D Meats)**	B	1181	100 St	Downtown BID		Vacant	3,003
Vacant **(former Ditto Beauty & Lash Bar - relocated to 1117 101 St)**		1166	100 St	Downtown BID		Vacant	1,163
Vacant **(former Giant Tiger)**		1121	102 St	Downtown BID		Vacant	21,872
Vacant building		1156	101 St	Downtown BID		Vacant	2,174
Vacant space		1187	101 St	Downtown BID		Vacant	1,378
Vapor's Choice		1171	100 St	Downtown BID		Tobacco & Cannabis	840
Venture Rehabilitation Sciences Group		982	102 St	Downtown BID		Medical & wellness service	1,507
Warrior Spirit Martial Arts Academy		1151	101 St	Downtown BID		Fitness & Leisure	2,476
Western Financial Group		1192	100 St	Downtown BID		Professional & financial service	3,929

TENANT NAME	UNIT #	CIVIC STREET #	STREET ADDRESS	NODE	SUB-NODE (if applicable)	RETAIL MERCHANDISE or BUSINESS CATEGORY	SIZE (sq. ft.)
306 Paint and Shades		1561	100 St	Downtown North (100 St)		Home Improvement & Gardening	2,443
7-Eleven		1752	100 St	Downtown North (100 St)		Grocery, Convenience & Specialty Foods	2,766
Assante Financial Management		1421	100 St	Downtown North (100 St)		Professional & financial service	1,259
Aurora Orthodontics	1	1472	100 St	Downtown North (100 St)		Medical & wellness service	1,389
BattleCity Health Club	102	1591	100 St	Downtown North (100 St)		Fitness & Leisure	5,038
Battleford's Pizza		1821	100 St	Downtown North (100 St)		Limited Service F&B	2,949
Big Brothers Big Sisters		1361	101 St	Downtown North (100 St)		Institutional & learning service	1,346
Birdies Golf Lounge		1462	100 St	Downtown North (100 St)		Fitness & Leisure	2,357
Blend Kitchen and Bar		1602	100 St	Downtown North (100 St)		Full Service F&B	6,189
Bliss and Bubs		1641	100 St	Downtown North (100 St)		Fashion & Footwear	6,297
BMB Asian Mart		1839	100 St	Downtown North (100 St)		Grocery, Convenience & Specialty Foods	1,679
Century 21 Prairie Elite		1401	100 St	Downtown North (100 St)		Professional & financial service	1,195
CJNB Radio		1711	100 St	Downtown North (100 St)		Institutional & learning service	5,457
Crackmasters		1861	100 St	Downtown North (100 St)		Auto Service	1,701
Crystal Rose Wellness		1482	100 St	Downtown North (100 St)		Specialty Retail	1,959
Dairy Queen		1691	100 St	Downtown North (100 St)		Limited Service F&B	3,498
David Conroy Law Office		1351	101 St	Downtown North (100 St)		Professional & financial service	904
Dream Realty SK		1541	100 St	Downtown North (100 St)		Professional & financial service	1,938
Esso		1892	100 St	Downtown North (100 St)		Auto Fuel	4,639
Family Pizza	C	1642	100 St	Downtown North (100 St)		Limited Service F&B	3,046
Feist Flanagan Law		1381	101 St	Downtown North (100 St)		Professional & financial service	2,142
Fisher's Drug Store		1501	100 St	Downtown North (100 St)		Pharmacy	4,026
Four K Auto Service		1761	100 St	Downtown North (100 St)		Auto Service	3,983
Gas Plus		1901	100 St	Downtown North (100 St)		Auto Fuel	1,894
Guy's Furniture and Appliances **(est 50% furniture & 50% app/elec)**		1822	100 St	Downtown North (100 St)		General Merchandise	13,412
Guy's Furniture Merchandise Category		1823	101 St	Downtown North (100 St)		Home Furnishings & Décor	6,706
Guy's Furniture Merchandise Category		1824	102 St	Downtown North (100 St)		Home Electronics & Appliances	6,705
HEAL Holistic Counselling		1391	101 St	Downtown North (100 St)		Medical & wellness service	1,055
Jeremy Cockrill, MLA		1991	100 St	Downtown North (100 St)		Institutional & learning service	1,206
Kardynal and Associates		1731	100 St	Downtown North (100 St)		Professional & financial service	1,647
KFC		1702	100 St	Downtown North (100 St)		Limited Service F&B	3,509
Logan's Day Spa		1532	100 St	Downtown North (100 St)		Beauty & Personal Care	3,003
Lux Salon		1662	100 St	Downtown North (100 St)		Beauty & Personal Care	990
Main Diner		1902	100 St	Downtown North (100 St)		Full Service F&B	3,671
Mainstreet Auto Body Ltd		1871	100 St	Downtown North (100 St)		Auto Service	3,520
Matrix Law Group		1421	101 St	Downtown North (100 St)		Professional & financial service	4,435
Migneault Law Office		1391	101 St	Downtown North (100 St)		Professional & financial service	1,324
Phase 4 Hair and Esthetics		1381	101 St	Downtown North (100 St)		Beauty & Personal Care	2,250
Pizza Depot	1	1462	100 St	Downtown North (100 St)		Limited Service F&B	1,518
Precision Denture Clinic		1492	100 St	Downtown North (100 St)		Medical & wellness service	3,175
Premium Vape	2	1472	100 St	Downtown North (100 St)		Tobacco & Cannabis	1,302
Rangers Skate Shop		1572	100 St	Downtown North (100 St)		Sporting Goods & Outdoor Recreation	549
Rayburn Dental Studio		1701	100 St	Downtown North (100 St)		Medical & wellness service	3,541
Recreated Interiors and Designs	A	1922	100 St	Downtown North (100 St)		Home Furnishings & Décor	1,313
Red Swan Pizza	100	1591	100 St	Downtown North (100 St)		Limited Service F&B	1,464
River Valley Eye Care		1471	100 St	Downtown North (100 St)		Medical & wellness service	5,113
Riverbend Dental Centre		1531	100 St	Downtown North (100 St)		Medical & wellness service	3,111
Service Canada		1401	101 St	Downtown North (100 St)		Institutional & learning service	4,682
Shiloff and Associates		1682	100 St	Downtown North (100 St)		Professional & financial service	1,528
Sigstads Prairie Catering		1642	100 St	Downtown North (100 St)		Grocery, Convenience & Specialty Foods	883
Sound City		1731	100 St	Downtown North (100 St)		Home Electronics & Appliances	4,833
Styles Plus		100	100 St	Downtown North (100 St)		Fashion & Footwear	1,841
Subway	103	1591	100 St	Downtown North (100 St)		Limited Service F&B	1,507
Synergy Prints		1545	100 St	Downtown North (100 St)		Specialty Retail	2,121
Toshiba Business Solutions		1411	100 St	Downtown North (100 St)		Professional & financial service	2,174
True North Financial Services		1512	100 St	Downtown North (100 St)		Professional & financial service	883

TENANT NAME	UNIT #	CIVIC STREET #	STREET ADDRESS	NODE	SUB-NODE (if applicable)	RETAIL MERCHANDISE or BUSINESS CATEGORY	SIZE (sq. ft.)
Ultra Print		1981	100 St	Downtown North (100 St)		Professional & financial service	6,157
Ultra Print		1981	100 St	Downtown North (100 St)		Professional & financial service	3,100
Vacant	103	1501	100 St	Downtown North (100 St)		Vacant	2,099
Vacant		1501	100 St	Downtown North (100 St)		Vacant	2,196
Vacant		1551	100 St	Downtown North (100 St)		Vacant	2,196
Vacant		1662	100 St	Downtown North (100 St)		Vacant	969
Vacant		1839	100 St	Downtown North (100 St)		Vacant	1,733
Vacant		1843	100 St	Downtown North (100 St)		Vacant	1,636
Vacant		1845	100 St	Downtown North (100 St)		Vacant	1,679
Vacant		1845	100 St	Downtown North (100 St)		Vacant	2,077
Vacant space		1837	100 St	Downtown North (100 St)		Vacant	1,507
Vacant space	C	1922	100 St	Downtown North (100 St)		Vacant	2,013
Vitality Acupuncture and Massage		1322	102 St	Downtown North (100 St)		Personal Service	861
Wand Wash		1892	100 St	Downtown North (100 St)		Auto Service	4,273
Western Appraisals		1652	100 St	Downtown North (100 St)		Professional & financial service	1,023
Westland Insurance		1891	100 St	Downtown North (100 St)		Professional & financial service	4,402
Williams Dental		1562	100 St	Downtown North (100 St)		Medical & wellness service	2,443
Aligned Holistic Health and Wellness		1943	St Laurent Dr	East		Fitness & Leisure	3,444
Battlefords Supermarket		1951	St Laurent Dr	East		Grocery, Convenience & Specialty Foods	2,067
Centex (Red Pheasant)		11402	15 Ave	East	Eagles Landing	Auto Fuel	2,217
Don Jerry's		1941	St Laurent Dr	East		Home Improvement & Gardening	4,596
Foodland Laundromat		1601	St Laurent Dr	East		Personal Service	1,830
Fran's Beauty Salon		1945	St Laurent Dr	East		Beauty & Personal Care	1,830
Lucky Dollar Foods		1951	St Laurent Dr	East		Grocery, Convenience & Specialty Foods	1,959
Round 2 Clothing		1949	St Laurent Dr	East		Fashion & Footwear	1,701
Starbucks		11441	15 Ave	East	Eagles Landing	Limited Service F&B	5,393
Tommy Gun's Original Barbershop		11441	15 Ave	East	Eagles Landing	Beauty & Personal Care	1,216
Vacant **(Eagles Landing Leasing Ongoing)**		11441	15 Ave	East	Eagles Landing	Vacant	1,216
Vacant **(Eagles Landing Leasing Ongoing)**		11441	15 Ave	East	Eagles Landing	Vacant	1,216
Vacant **(Eagles Landing Leasing Ongoing)**		11441	15 Ave	East	Eagles Landing	Vacant	1,216
Vacant **(Eagles Landing Leasing Ongoing)**		11441	15 Ave	East	Eagles Landing	Vacant	1,216
Vacant **(Eagles Landing Leasing Ongoing)**		11441	15 Ave	East	Eagles Landing	Vacant	1,216
Vacant **(Eagles Landing Leasing Ongoing)**		11441	15 Ave	East	Eagles Landing	Vacant	1,216
Vacant **(Eagles Landing Leasing Ongoing)**		11441	15 Ave	East	Eagles Landing	Vacant	1,216
Vacant **(Eagles Landing Leasing Ongoing)**		11441	15 Ave	East	Eagles Landing	Vacant	1,216
Vacant **(Eagles Landing Leasing Ongoing)**		11441	15 Ave	East	Eagles Landing	Vacant	1,216
Vacant **(Eagles Landing Leasing Ongoing)**		11441	15 Ave	East	Eagles Landing	Vacant	1,216
Vacant **(Eagles Landing Leasing Ongoing)**		11441	15 Ave	East	Eagles Landing	Vacant	1,216
Vacant **(Eagles Landing Leasing Ongoing)**		11441	15 Ave	East	Eagles Landing	Vacant	1,216
Vacant **(Eagles Landing Leasing Ongoing)**		11441	15 Ave	East	Eagles Landing	Vacant	1,216
Vacant **(Eagles Landing Leasing Ongoing)**		11441	15 Ave	East	Eagles Landing	Vacant	1,216
CJV The Carpet People	101	2741	104 St	Neighbourhood		Home Improvement & Gardening	4,919
Farm Credit Canada		2492	103 St	Neighbourhood		Professional & financial service	4,639
Marhaba Restaurant		1708	Thompson Crescent	Neighbourhood		Full Service F&B	1,216
Northside Shine Ur Ride		2902	103 St	Neighbourhood		Auto Service	12,432
Potter's House Christian Fellowship Church		1701	91 St	Neighbourhood		Institutional & learning service	3,423
Stacie Churchill & Meagan Gratton, Drs		1711	91 St	Neighbourhood		Medical & wellness service	2,454
Tags Foodland		1702	Thompson Crescent	Neighbourhood		Grocery, Convenience & Specialty Foods	2,379
Vacant **(former Sambo's)**		991	109 St	Neighbourhood		Vacant	3,218
Wally's Food Basket		1102	107 St	Neighbourhood		Grocery, Convenience & Specialty Foods	3,046

TENANT NAME	UNIT #	CIVIC STREET #	STREET ADDRESS	NODE	SUB-NODE (if applicable)	RETAIL MERCHANDISE or BUSINESS CATEGORY	SIZE (sq. ft.)
A&W Canada		2142	100 St	North		Limited Service F&B	5,038
Aaron's Rent To Own		2092	100 St	North		Home Electronics & Appliances	6,394
Affordable Mattress and Furniture		2701	99 St	North		Home Furnishings & Décor	10,441
Artrageous Framing and Gallery		2062	100 St	North		Home Furnishings & Décor	1,798
Battlefords Denture Care	1702	9800	Territorial Dr	North	Territorial Place Mall	Medical & wellness service	1,561
Battlefords Flooring Centre			Hwy 4	North		Home Improvement & Gardening	11,378
Battlefords Landscape Supply		2671	99 St	North		Home Improvement & Gardening	2,433
Betty Bubbs Ltd	2	2652	102 St	North		Auto Service	8,600
Bistro Bliss Restaurant		2001	101 St	North		Full Service F&B	6,437
Bralin Technology Solutions	104	2062	100 St	North		Professional & financial service	2,088
Bridges **Chevrolet Buick GMC**		2501	99 St	North		Auto/RV/Motorsports Dealership	18,632
CAA Saskatchewan		2002	100 St	North		Professional & financial service	1,442
Cafe Al Fresco		2062	100 St	North		Limited Service F&B	2,131
CBI Health	1601	9800	Territorial Dr	North	Territorial Place Mall	Medical & wellness service	3,574
City Furniture and Appliances **(est 50% furniture & 50% app/elec)**		2702	100 St	North		General Merchandise	21,087
City Furniture Merchandise Category		2703	101 St	North		Home Furnishings & Décor	10,544
City Furniture Merchandise Category		2704	102 St	North		Home Electronics & Appliances	10,543
Co-op Gas Bar		9800	Territorial Dr	North	Territorial Place Mall	Auto Fuel	3,617
Co-op Touchless Car Wash		9800	Territorial Dr	North	Territorial Place Mall	Auto Service	2,325
Country Cuisine		2401	99 St	North		Full Service F&B	3,283
Culligan Water		2192	100 St	North		Home Improvement & Gardening	6,146
Denise's Massage	1302	9800	Territorial Dr	North	Territorial Place Mall	Personal Service	452
Direct Travel	1602	9800	Territorial Dr	North	Territorial Place Mall	Professional & financial service	861
Discovery Co-op Cafe	401	9800	Territorial Dr	North	Territorial Place Mall	Limited Service F&B	3,412
Discovery Co-op Food Store	702	9800	Territorial Dr	North	Territorial Place Mall	Grocery, Convenience & Specialty Foods	32,292
Discovery Co-op Home Centre and Lumber	1901	9800	Territorial Dr	North	Territorial Place Mall	Home Improvement & Gardening	31,248
Discovery Co-op Liquor Store	101	9800	Territorial Dr	North	Territorial Place Mall	Alcohol (Off-Premise)	3,477
Discovery Co-op Pharmacy	705	9800	Territorial Dr	North	Territorial Place Mall	Pharmacy	4,682
Dragon Heart Tattoo and Piercing		2112	102 St	North		Beauty & Personal Care	980
Empress Flooring		3041	99 St	North		Home Improvement & Gardening	5,457
FF2	1903	9800	Territorial Dr	North	Territorial Place Mall	Fashion & Footwear	6,329
FFUN **Dodge** North Battleford		3042	101 St	North		Auto/RV/Motorsports Dealership	20,441
Freedom RV and Marine		3052	100 St	North		Auto/RV/Motorsports Dealership	11,044
Green Dojo		2202	100 St	North		Fitness & Leisure	1,873
Hustle House		9902	20 Ave	North		Fitness & Leisure	3,240
Krazzee Kones		2042	102 St	North		Limited Service F&B	409
Learning Adventures Toys and Games	502	9800	Territorial Dr	North	Territorial Place Mall	Toys & Hobbies	1,615
Leisure Time Sports Excellence	1902	9800	Territorial Dr	North	Territorial Place Mall	Sporting Goods & Outdoor Recreation	7,104
McDonald's		9801	Territorial Dr	North		Limited Service F&B	4,553
North Battleford **Hyundai**		3102	99 St	North		Auto/RV/Motorsports Dealership	9,655
North Battleford **Toyota**		3022	102 St	North		Auto/RV/Motorsports Dealership	21,571
Northwest Parts and Service		2891	99 St	North		Auto Service	3,272
Oil Can Charlie's Ltd		2652	101 St	North		Auto Service	1,485
Parkland Farm Equipment			Hwy 4	North		Auto/RV/Motorsports Dealership	15,683
Pureific Water		101	101 St	North		Grocery, Convenience & Specialty Foods	753
QQ Nails and Spa	504	9800	Territorial Dr	North	Territorial Place Mall	Beauty & Personal Care	1,087
SaskJobs Career and Employment Services	1501	9800	Territorial Dr	North	Territorial Place Mall	Institutional & learning service	5,823
Second Debut Discount Clothing		2741	99 St	North		Fashion & Footwear	5,296
Sobeys		9801	Territorial Dr	North		Grocery, Convenience & Specialty Foods	27,868
SpesMed Specialist Medical Centre		2591	99 St	North		Medical & wellness service	7,104
Superior Water	4	2112	101 St	North		Grocery, Convenience & Specialty Foods	904
Territorial Dental Clinic	1304	9800	Territorial Dr	North	Territorial Place Mall	Medical & wellness service	2,594
The Brick **(est 50% furniture & 50% app/elec)**		2731	Hwy 4	North		General Merchandise	10,387
The Brick Furniture Merchandise Category		2732	Hwy 5	North		Home Furnishings & Décor	5,194
The Brick Furniture Merchandise Category		2733	Hwy 6	North		Home Electronics & Appliances	5,193

TENANT NAME	UNIT #	CIVIC STREET #	STREET ADDRESS	NODE	SUB-NODE (if applicable)	RETAIL MERCHANDISE or BUSINESS CATEGORY	SIZE (sq. ft.)
The Co-operators	1202	9800	Territorial Dr	North	Territorial Place Mall	Professional & financial service	1,561
The Flats Eatery and Drink		2491	99 St	North		Full Service F&B	4,036
The Hair Loft	1203	9800	Territorial Dr	North	Territorial Place Mall	Beauty & Personal Care	710
The Yellow Submarine	501	9800	Territorial Dr	North	Territorial Place Mall	Limited Service F&B	861
Tim Horton's		9803	Territorial Dr	North		Limited Service F&B	2,982
Vacant **(Discovery Coop Centre)**	1303B	9800	Territorial Dr	North	Territorial Place Mall	Vacant	463
Vacant **(Discovery Coop Centre)**	202	9800	Territorial Dr	North	Territorial Place Mall	Vacant	861
Valley **Ford** Sales		2222	100 St	North		Auto/RV/Motorsports Dealership	14,983
Valley Ford Service		2222	100 St	North		Auto Service	15,156
Visual Eyes Optical	201	9800	Territorial Dr	North	Territorial Place Mall	Medical & wellness service	883
Your Dollar Store With More	1204	9800	Territorial Dr	North	Territorial Place Mall	Specialty Retail	4,370
You're Next Barbershop	301	9800	Territorial Dr	North	Territorial Place Mall	Beauty & Personal Care	883
ZEL Safety Services	1303A	9800	Territorial Dr	North	Territorial Place Mall	Institutional & learning service	452
ZEL Safety Services Occupational Health Services	1305	9800	Territorial Dr	North	Territorial Place Mall	Medical & wellness service	743
5Buds	104	312	Territorial Dr	South		Tobacco & Cannabis	1,399
A&W Canada		11401	Railway Ave E	South		Limited Service F&B	2,809
Adora Diamonds		11422	Railway Ave E	South	Frontier Centre	Jewelry & Accessories	2,260
Aurora Nail Spa		11402	Railway Ave E	South		Beauty & Personal Care	926
Austin's Saddlery		1005	Battleford Rd	South		Fashion & Footwear	3,520
Battlefords Animal Hospital		11204	Railway Ave E	South		Professional & financial service	3,649
Battlefords Hearing Center	2	11204	Railway Ave E	South		Medical & wellness service	1,507
Beaver Grill Express		623	Carlton Trail	South		Full Service F&B	1,572
Bennigan's		1001	Hwy 16 Bypass	South		Limited Service F&B	2,024
Big Barrel Tavern		609	Carlton Trail	South		Limited Service F&B	1,496
Big D's Food Kiosk		11429	Railway Ave E	South	Frontier Centre	Limited Service F&B	205
Bootlegger	13–15	11413	Railway Ave E	South	Frontier Centre	Fashion & Footwear	4,209
Boston Pizza	34	11434	Railway Ave E	South	Frontier Centre	Full Service F&B	4,747
Bulk Barn	101	312	Territorial Dr	South		Grocery, Convenience & Specialty Foods	4,790
Burger King		11400	Railway Ave E	South	Frontier Centre	Limited Service F&B	3,498
Canadian Tire General Merchandiser		11802	Railway Ave E	South		General Merchandise	37,835
Canadian Tire Merchandise Category		11802	Railway Ave E	South		Arts & Entertainment	0
Canadian Tire Merchandise Category		11802	Railway Ave E	South		Auto Parts & Accessories	11,351
Canadian Tire Merchandise Category		11802	Railway Ave E	South		Auto Service	11,351
Canadian Tire Merchandise Category		11802	Railway Ave E	South		Beauty & Personal Care	0
Canadian Tire Merchandise Category		11802	Railway Ave E	South		Books, Media & Video Games	0
Canadian Tire Merchandise Category		11802	Railway Ave E	South		Fashion & Footwear	378
Canadian Tire Merchandise Category		11802	Railway Ave E	South		Full Service F&B	0
Canadian Tire Merchandise Category		11802	Railway Ave E	South		Grocery, Convenience & Specialty Foods	0
Canadian Tire Merchandise Category		11802	Railway Ave E	South		Home Electronics & Appliances	757
Canadian Tire Merchandise Category		11802	Railway Ave E	South		Home Furnishings & Décor	757
Canadian Tire Merchandise Category		11802	Railway Ave E	South		Home Improvement & Gardening	9,459
Canadian Tire Merchandise Category		11802	Railway Ave E	South		Jewelry & Accessories	0
Canadian Tire Merchandise Category		11802	Railway Ave E	South		Limited Service F&B	0
Canadian Tire Merchandise Category		11802	Railway Ave E	South		Personal Service	0
Canadian Tire Merchandise Category		11802	Railway Ave E	South		Pharmacy	0
Canadian Tire Merchandise Category		11802	Railway Ave E	South		Specialty Retail	1,135
Canadian Tire Merchandise Category		11802	Railway Ave E	South		Sporting Goods & Outdoor Recreation	1,892
Canadian Tire Merchandise Category		11802	Railway Ave E	South		Tobacco & Cannabis	0
Canadian Tire Merchandise Category		11802	Railway Ave E	South		Toys & Hobbies	757
Cashco Loans	102	312	Territorial Dr	South		Professional & financial service	1,744
Co-op Gas Bar		601	Carlton Trail	South		Auto Fuel	2,497
Co-op Touchless Car Wash		601	Carlton Trail	South		Auto Service	1,249
Co-op Wine Spirits Beer	C	609	Carlton Trail	South		Alcohol (Off-Premise)	5,038
Co-op Wine Spirits Beer		11204	Railway Ave E	South		Alcohol (Off-Premise)	3,154
Deja Vu Kreations Studio	4A	11204	Railway Ave E	South		Beauty & Personal Care	1,593

TENANT NAME	UNIT #	CIVIC STREET #	STREET ADDRESS	NODE	SUB-NODE (if applicable)	RETAIL MERCHANDISE or BUSINESS CATEGORY	SIZE (sq. ft.)
Dollar Tree General Merchandiser	109	312	Territorial Dr	South		General Merchandise	8,568
Dollar Tree Merchandise Category	109	312	Territorial Dr	South		Arts & Entertainment	0
Dollar Tree Merchandise Category	109	312	Territorial Dr	South		Auto Parts & Accessories	428
Dollar Tree Merchandise Category	109	312	Territorial Dr	South		Auto Service	
Dollar Tree Merchandise Category	109	312	Territorial Dr	South		Beauty & Personal Care	171
Dollar Tree Merchandise Category	109	312	Territorial Dr	South		Books, Media & Video Games	43
Dollar Tree Merchandise Category	109	312	Territorial Dr	South		Fashion & Footwear	428
Dollar Tree Merchandise Category	109	312	Territorial Dr	South		Full Service F&B	0
Dollar Tree Merchandise Category	109	312	Territorial Dr	South		Grocery, Convenience & Specialty Foods	1,714
Dollar Tree Merchandise Category	109	312	Territorial Dr	South		Home Electronics & Appliances	171
Dollar Tree Merchandise Category	109	312	Territorial Dr	South		Home Furnishings & Décor	1,285
Dollar Tree Merchandise Category	109	312	Territorial Dr	South		Home Improvement & Gardening	428
Dollar Tree Merchandise Category	109	312	Territorial Dr	South		Jewelry & Accessories	43
Dollar Tree Merchandise Category	109	312	Territorial Dr	South		Limited Service F&B	0
Dollar Tree Merchandise Category	109	312	Territorial Dr	South		Personal Service	0
Dollar Tree Merchandise Category	109	312	Territorial Dr	South		Pharmacy	0
Dollar Tree Merchandise Category	109	312	Territorial Dr	South		Specialty Retail	2,570
Dollar Tree Merchandise Category	109	312	Territorial Dr	South		Sporting Goods & Outdoor Recreation	428
Dollar Tree Merchandise Category	109	312	Territorial Dr	South		Tobacco & Cannabis	0
Dollar Tree Merchandise Category	109	312	Territorial Dr	South		Toys & Hobbies	857
Dollarama General Merchanidiser		11407	Railway Ave E	South	Frontier Centre	General Merchandise	15,812
Dollarama Merchandise Category		11407	Railway Ave E	South	Frontier Centre	Arts & Entertainment	0
Dollarama Merchandise Category		11407	Railway Ave E	South	Frontier Centre	Auto Parts & Accessories	791
Dollarama Merchandise Category		11407	Railway Ave E	South	Frontier Centre	Auto Service	
Dollarama Merchandise Category		11407	Railway Ave E	South	Frontier Centre	Beauty & Personal Care	316
Dollarama Merchandise Category		11407	Railway Ave E	South	Frontier Centre	Books, Media & Video Games	79
Dollarama Merchandise Category		11407	Railway Ave E	South	Frontier Centre	Fashion & Footwear	791
Dollarama Merchandise Category		11407	Railway Ave E	South	Frontier Centre	Full Service F&B	0
Dollarama Merchandise Category		11407	Railway Ave E	South	Frontier Centre	Grocery, Convenience & Specialty Foods	3,162
Dollarama Merchandise Category		11407	Railway Ave E	South	Frontier Centre	Home Electronics & Appliances	316
Dollarama Merchandise Category		11407	Railway Ave E	South	Frontier Centre	Home Furnishings & Décor	2,372
Dollarama Merchandise Category		11407	Railway Ave E	South	Frontier Centre	Home Improvement & Gardening	791
Dollarama Merchandise Category		11407	Railway Ave E	South	Frontier Centre	Jewelry & Accessories	79
Dollarama Merchandise Category		11407	Railway Ave E	South	Frontier Centre	Limited Service F&B	0
Dollarama Merchandise Category		11407	Railway Ave E	South	Frontier Centre	Personal Service	0
Dollarama Merchandise Category		11407	Railway Ave E	South	Frontier Centre	Pharmacy	0
Dollarama Merchandise Category		11407	Railway Ave E	South	Frontier Centre	Specialty Retail	4,744
Dollarama Merchandise Category		11407	Railway Ave E	South	Frontier Centre	Sporting Goods & Outdoor Recreation	791
Dollarama Merchandise Category		11407	Railway Ave E	South	Frontier Centre	Tobacco & Cannabis	0
Dollarama Merchandise Category		11407	Railway Ave E	South	Frontier Centre	Toys & Hobbies	1,581
Domino's		302	114 St	South		Limited Service F&B	1,475
Easyfinancial	2	603	Carlton Trail	South		Professional & financial service	1,313
Edo Japan	103	312	Territorial Dr	South		Limited Service F&B	1,475
Fas Gas		391	Railway Ave E	South		Auto Fuel	1,163
Fire and Flower Cannabis	2	302	114 St	South		Tobacco & Cannabis	1,582
Freshii		11424	Railway Ave E	South	Frontier Centre	Limited Service F&B	2,239
Fuji Sushi		302	114 St	South		Full Service F&B	1,507
Gold Eagle Casino		11902	Railway Ave E	South		Arts & Entertainment	11,141
Gold Eagle Gas Bar		520	Heritage Way	South		Auto Fuel	1,001
Great Canadian Oil Change		502	Frontier Way	South		Auto Service	1,378
Hailey's		11212	Railway Ave E	South		Full Service F&B	6,308
Home Hardware		11301	6 Ave	South		Home Improvement & Gardening	50,365
Humpty's			Hwy 16 Bypass	South		Full Service F&B	3,574
K5 Insurance		603	Carlton Trail	South		Professional & financial service	1,313
Kal Tire		592	110 St	South		Auto Parts & Accessories	10,043
Kihiw Restaurant		11902	Railway Ave E	South		Full Service F&B	4,650
Little Caesars	107	312	Territorial Dr	South		Limited Service F&B	1,356

TENANT NAME	UNIT #	CIVIC STREET #	STREET ADDRESS	NODE	SUB-NODE (if applicable)	RETAIL MERCHANDISE or BUSINESS CATEGORY	SIZE (sq. ft.)
M&M Food Market		11204	Railway Ave E	South		Grocery, Convenience & Specialty Foods	2,433
Mark's		602	Carlton Trail	South		Fashion & Footwear	12,131
McDonald's		601	Carlton Trail	South		Limited Service F&B	2,594
McDonald's		11102	Railway Ave E	South		Limited Service F&B	5,877
Mike's Club Wear		11410	Railway Ave E	South	Frontier Centre	Fashion & Footwear	2,207
Mobil		11404	Railway Ave E	South	Frontier Centre	Auto Fuel	753
Money Mart	3	11204	Railway Ave E	South		Professional & financial service	2,013
Montana's		604	Carlton Trail	South		Full Service F&B	4,036
No Frills		11430	Railway Ave E	South	Frontier Centre	Grocery, Convenience & Specialty Foods	34,961
North Battleford Medical Imaging		11429	Railway Ave E	South	Frontier Centre	Medical & wellness service	2,357
Nutters Everyday Naturals		11204	Railway Ave E	South		Grocery, Convenience & Specialty Foods	3,907
Pet Valu	108	312	Territorial Dr	South		Specialty Retail	3,197
Petro-Canada			Hwy 16 Bypass	South		Auto Fuel	1,959
Pizza Hut		11204	Railway Ave E	South		Full Service F&B	4,101
Primary Health Centre		11427	Railway Ave E	South		Medical & wellness service	17,265
Quesada	106	312	Territorial Dr	South		Limited Service F&B	1,173
Rob's Denture Studio		11432	Railway Ave E	South		Medical & wellness service	2,077
Shoppers Drug Mart General Merchandiser		11412	Railway Ave E	South	Frontier Centre	General Merchandise	13,993
Shoppers Drug Mart Merchandise Category		11412	Railway Ave E	South	Frontier Centre	Arts & Entertainment	0
Shoppers Drug Mart Merchandise Category		11412	Railway Ave E	South	Frontier Centre	Auto Parts & Accessories	0
Shoppers Drug Mart Merchandise Category		11412	Railway Ave E	South	Frontier Centre	Auto Service	
Shoppers Drug Mart Merchandise Category		11412	Railway Ave E	South	Frontier Centre	Beauty & Personal Care	4,198
Shoppers Drug Mart Merchandise Category		11412	Railway Ave E	South	Frontier Centre	Books, Media & Video Games	280
Shoppers Drug Mart Merchandise Category		11412	Railway Ave E	South	Frontier Centre	Fashion & Footwear	0
Shoppers Drug Mart Merchandise Category		11412	Railway Ave E	South	Frontier Centre	Full Service F&B	0
Shoppers Drug Mart Merchandise Category		11412	Railway Ave E	South	Frontier Centre	Grocery, Convenience & Specialty Foods	2,799
Shoppers Drug Mart Merchandise Category		11412	Railway Ave E	South	Frontier Centre	Home Electronics & Appliances	0
Shoppers Drug Mart Merchandise Category		11412	Railway Ave E	South	Frontier Centre	Home Furnishings & Décor	0
Shoppers Drug Mart Merchandise Category		11412	Railway Ave E	South	Frontier Centre	Home Improvement & Gardening	0
Shoppers Drug Mart Merchandise Category		11412	Railway Ave E	South	Frontier Centre	Jewelry & Accessories	280
Shoppers Drug Mart Merchandise Category		11412	Railway Ave E	South	Frontier Centre	Limited Service F&B	0
Shoppers Drug Mart Merchandise Category		11412	Railway Ave E	South	Frontier Centre	Personal Service	0
Shoppers Drug Mart Merchandise Category		11412	Railway Ave E	South	Frontier Centre	Pharmacy	5,597
Shoppers Drug Mart Merchandise Category		11412	Railway Ave E	South	Frontier Centre	Specialty Retail	280
Shoppers Drug Mart Merchandise Category		11412	Railway Ave E	South	Frontier Centre	Sporting Goods & Outdoor Recreation	280
Shoppers Drug Mart Merchandise Category		11412	Railway Ave E	South	Frontier Centre	Tobacco & Cannabis	0
Shoppers Drug Mart Merchandise Category		11412	Railway Ave E	South	Frontier Centre	Toys & Hobbies	280
Smitty's		1001	Hwy 16 Bypass	South		Full Service F&B	2,669
Splish Splash Auto Wash		521	Pioneer Ave	South		Auto Service	10,215

TENANT NAME	UNIT #	CIVIC STREET #	STREET ADDRESS	NODE	SUB-NODE (if applicable)	RETAIL MERCHANDISE or BUSINESS CATEGORY	SIZE (sq. ft.)
Sport Chek General Merchandiser		11402	Railway Ave E	South	Frontier Centre	General Merchandise	12,336
Sport Chek Merchandise Category				South	Frontier Centre	Arts & Entertainment	0
Sport Chek Merchandise Category				South	Frontier Centre	Auto Parts & Accessories	0
Sport Chek Merchandise Category				South	Frontier Centre	Auto Service	
Sport Chek Merchandise Category				South	Frontier Centre	Beauty & Personal Care	0
Sport Chek Merchandise Category				South	Frontier Centre	Books, Media & Video Games	0
Sport Chek Merchandise Category				South	Frontier Centre	Fashion & Footwear	6,168
Sport Chek Merchandise Category				South	Frontier Centre	Full Service F&B	0
Sport Chek Merchandise Category				South	Frontier Centre	Grocery, Convenience & Specialty Foods	0
Sport Chek Merchandise Category				South	Frontier Centre	Home Electronics & Appliances	0
Sport Chek Merchandise Category				South	Frontier Centre	Home Furnishings & Décor	0
Sport Chek Merchandise Category				South	Frontier Centre	Home Improvement & Gardening	0
Sport Chek Merchandise Category				South	Frontier Centre	Jewelry & Accessories	0
Sport Chek Merchandise Category				South	Frontier Centre	Limited Service F&B	0
Sport Chek Merchandise Category				South	Frontier Centre	Personal Service	0
Sport Chek Merchandise Category				South	Frontier Centre	Pharmacy	0
Sport Chek Merchandise Category				South	Frontier Centre	Specialty Retail	0
Sport Chek Merchandise Category				South	Frontier Centre	Sporting Goods & Outdoor Recreation	6,168
Sport Chek Merchandise Category				South	Frontier Centre	Tobacco & Cannabis	0
Sport Chek Merchandise Category				South	Frontier Centre	Toys & Hobbies	0
Staples General Merchandiser		11437	Railway Ave E	South	Frontier Centre	General Merchandise	13,595
Staples Merchandise Category				South	Frontier Centre	Arts & Entertainment	0
Staples Merchandise Category				South	Frontier Centre	Auto Parts & Accessories	0
Staples Merchandise Category				South	Frontier Centre	Auto Service	0
Staples Merchandise Category				South	Frontier Centre	Beauty & Personal Care	0
Staples Merchandise Category				South	Frontier Centre	Books, Media & Video Games	272
Staples Merchandise Category				South	Frontier Centre	Fashion & Footwear	0
Staples Merchandise Category				South	Frontier Centre	Full Service F&B	0
Staples Merchandise Category				South	Frontier Centre	Grocery, Convenience & Specialty Foods	0
Staples Merchandise Category				South	Frontier Centre	Home Electronics & Appliances	3,127
Staples Merchandise Category				South	Frontier Centre	Home Furnishings & Décor	3,399
Staples Merchandise Category				South	Frontier Centre	Home Improvement & Gardening	0
Staples Merchandise Category				South	Frontier Centre	Jewelry & Accessories	0
Staples Merchandise Category				South	Frontier Centre	Limited Service F&B	0
Staples Merchandise Category				South	Frontier Centre	Personal Service	0
Staples Merchandise Category				South	Frontier Centre	Pharmacy	0
Staples Merchandise Category				South	Frontier Centre	Specialty Retail	6,798
Staples Merchandise Category				South	Frontier Centre	Sporting Goods & Outdoor Recreation	0
Staples Merchandise Category				South	Frontier Centre	Tobacco & Cannabis	0
Staples Merchandise Category				South	Frontier Centre	Toys & Hobbies	0
Subway	105	312	Territorial Dr	South		Limited Service F&B	1,421
Supplement World	104	609	Carlton Trail	South		Specialty Retail	1,905
TacoTime		302	114 St	South		Limited Service F&B	1,744
The Yellow Submarine	B	609	Carlton Trail	South		Limited Service F&B	1,582
Tim Horton's		11402	Railway Ave E	South	Frontier Centre	Limited Service F&B	2,594

TENANT NAME	UNIT #	CIVIC STREET #	STREET ADDRESS	NODE	SUB-NODE (if applicable)	RETAIL MERCHANDISE or BUSINESS CATEGORY	SIZE (sq. ft.)
Vacant (for lease, **former Mettaxxas Tavern**)		302	114 St	South		Vacant	1,432
Vacant (in Frontier Centre - former Ardene)	30	11423	Railway Ave E	South	Frontier Centre	Vacant	4,467
Vacant (in Frontier Centre - former Easyhome)	7A	11411	Railway Ave E	South	Frontier Centre	Vacant	4,280
Vacant (in Frontier Centre)	28	11411	Railway Ave E	South	Frontier Centre	Vacant	9,860
Vacant (in Frontier Centre)	23	11429	Railway Ave E	South	Frontier Centre	Vacant	3,309
Vacant (in Frontier Centre)	17	11429	Railway Ave E	South	Frontier Centre	Vacant	1,283
Vacant (in Frontier Centre)	6	11429	Railway Ave E	South	Frontier Centre	Vacant	2,125
Vacant (in Frontier Centre)	26	11429	Railway Ave E	South	Frontier Centre	Vacant	1,259
Vacant (in Frontier Centre)	18	11429	Railway Ave E	South	Frontier Centre	Vacant	800
Vacant **(new build)**		609	Carlton Trail	South		Vacant	1,658
Vacant (strip centre)		11204	Railway Ave E	South		Vacant	1,981
Vacant building **(Peavey Mart - CLOSING)**		11442	Railway Ave E	South	Frontier Centre	Vacant	27,717
Walmart General Merchandiser		601	Carlton Trail	South		General Merchandise	135,314
Walmart Merchandise Category		601	Carlton Trail	South		Arts & Entertainment	0
Walmart Merchandise Category		601	Carlton Trail	South		Auto Parts & Accessories	3,383
Walmart Merchandise Category		601	Carlton Trail	South		Auto Service	13,531
Walmart Merchandise Category		601	Carlton Trail	South		Beauty & Personal Care	6,766
Walmart Merchandise Category		601	Carlton Trail	South		Books, Media & Video Games	3,383
Walmart Merchandise Category		601	Carlton Trail	South		Fashion & Footwear	27,063
Walmart Merchandise Category		601	Carlton Trail	South		Full Service F&B	0
Walmart Merchandise Category		601	Carlton Trail	South		Grocery, Convenience & Specialty Foods	33,829
Walmart Merchandise Category		601	Carlton Trail	South		Home Electronics & Appliances	6,766
Walmart Merchandise Category		601	Carlton Trail	South		Home Furnishings & Décor	6,766
Walmart Merchandise Category		601	Carlton Trail	South		Home Improvement & Gardening	8,119
Walmart Merchandise Category		601	Carlton Trail	South		Jewelry & Accessories	2,706
Walmart Merchandise Category		601	Carlton Trail	South		Limited Service F&B	2,706
Walmart Merchandise Category		601	Carlton Trail	South		Personal Service	4,059
Walmart Merchandise Category		601	Carlton Trail	South		Pharmacy	6,766
Walmart Merchandise Category		601	Carlton Trail	South		Specialty Retail	4,059
Walmart Merchandise Category		601	Carlton Trail	South		Sporting Goods & Outdoor Recreation	2,706
Walmart Merchandise Category		601	Carlton Trail	South		Tobacco & Cannabis	0
Walmart Merchandise Category		601	Carlton Trail	South		Toys & Hobbies	2,706
Warehouse One	21	11421	Railway Ave E	South	Frontier Centre	Fashion & Footwear	2,777

APPENDIX B: Trade Area Demographic Tables

Appendix Table 1: Household income breakdown

Attribute	Benchmark: SK		North Battleford CMA			Trade area		
	Value	Percent	Value	Percent	Index	Value	Percent	Index
Household income								
Total number of households	498,669		8,436			16,801		
Average household income $	$112,060.00		$100,069.00		89	$96,443.00		86
Median household income $	$91,870.00		$93,671.00		102	$82,591.00		90
Household with income under $5,000	3,285	0.66%	41	0.49%	74	137	0.82%	124
Household with income $5,000 to $9,999	2,966	0.60%	39	0.46%	77	138	0.82%	137
Household with income $10,000 to $14,999	4,350	0.87%	83	0.98%	113	175	1.04%	120
Household with income $15,000 to $19,999	8,120	1.63%	161	1.91%	117	368	2.19%	134
Household with income $20,000 to $24,999	16,477	3.30%	338	4.01%	122	739	4.40%	133
Household with income $25,000 to $29,999	16,514	3.31%	292	3.46%	105	650	3.87%	117
Household with income $30,000 to $34,999	16,104	3.23%	313	3.71%	115	642	3.82%	118
Household with income $35,000 to $39,999	17,612	3.53%	317	3.76%	107	670	3.99%	113
Household with income $40,000 to $44,999	18,702	3.75%	338	4.01%	107	695	4.14%	110
Household with income $45,000 to $49,999	19,980	4.01%	380	4.51%	112	761	4.53%	113
Household with income $50,000 to $59,999	32,170	6.45%	590	6.99%	108	1,159	6.90%	107
Household with income $60,000 to $69,999	34,808	6.98%	590	6.99%	100	1,259	7.49%	107
Household with income $70,000 to $79,999	34,427	6.90%	596	7.07%	102	1,192	7.10%	103
Household with income $80,000 to $89,999	32,610	6.54%	567	6.72%	103	1,121	6.67%	102
Household with income $90,000 to $99,999	31,565	6.33%	544	6.45%	102	1,088	6.48%	102
Household with income $100,000 and over	208,979	41.91%	3,248	38.50%	92	6,007	35.75%	85
Household with income $100,000 to $124,999	51,742	10.38%	865	10.25%	99	1,633	9.72%	94
Household with income $125,000 to $149,999	47,531	9.53%	775	9.19%	96	1,460	8.69%	91
Household with income $150,000 to $199,999	51,240	10.28%	806	9.55%	93	1,450	8.63%	84
Household with income $200,000 and over	58,466	11.72%	802	9.51%	81	1,465	8.72%	74
Household with income $200,000 to $249,999	31,732	6.36%	438	5.19%	82	736	4.38%	69
Household with income $250,000 to $299,999	10,215	2.05%	141	1.67%	81	295	1.76%	86
Household with income $300,000 and over	16,504	3.31%	222	2.63%	79	429	2.55%	77

Appendix Table 2: Trade area age breakdown

Attribute	Benchmark: SK		North Battleford CMA			Trade area		
	Value	Percent	Value	Percent	Index	Value	Percent	Index
Population age group								
Total population by age groups	1,256,541		20,736			41,171		
0-14	235,423	18.74%	3,953	19.06%	102	7,777	18.89%	101
0-4	71,090	5.66%	1,209	5.83%	103	2,370	5.76%	102
5-9	80,855	6.44%	1,358	6.55%	102	2,663	6.47%	100
10-14	83,478	6.64%	1,386	6.68%	101	2,744	6.66%	100
15-64	795,566	63.31%	12,668	61.09%	96	24,606	59.77%	94
15-19	80,181	6.38%	1,388	6.69%	105	2,715	6.60%	103
20-24	79,414	6.32%	1,268	6.12%	97	2,314	5.62%	89
25-29	79,442	6.32%	1,211	5.84%	92	2,225	5.40%	85
30-34	82,873	6.60%	1,274	6.14%	93	2,350	5.71%	87
35-39	93,472	7.44%	1,467	7.08%	95	2,715	6.59%	89
40-44	89,495	7.12%	1,434	6.92%	97	2,645	6.42%	90
45-49	76,312	6.07%	1,234	5.95%	98	2,333	5.67%	93
50-54	68,581	5.46%	1,073	5.18%	95	2,152	5.23%	96
55-59	67,686	5.39%	1,038	5.01%	93	2,236	5.43%	101
60-64	78,111	6.22%	1,281	6.18%	99	2,922	7.10%	114
65 and over	225,551	17.95%	4,114	19.84%	111	8,788	21.34%	119
65-69	71,893	5.72%	1,234	5.95%	104	2,814	6.83%	119
70-74	56,633	4.51%	1,001	4.83%	107	2,233	5.42%	120
75-79	40,834	3.25%	745	3.59%	110	1,617	3.93%	121
80-84	26,330	2.10%	501	2.42%	115	1,007	2.45%	117
85 and over	29,861	2.38%	633	3.05%	128	1,118	2.71%	114
85-89	18,394	1.46%	387	1.87%	128	717	1.74%	119
90-94	8,957	0.71%	192	0.93%	131	312	0.76%	107
95-99	2,188	0.17%	46	0.22%	129	70	0.17%	100
100 and over	323	0.03%	8	0.04%	133	19	0.05%	167
Average age of total population	39.90		40.50		102	41.50		104
Median age of total population	38.80		39.30		101	41.30		106

Indexing Legend for Demographic Tables

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>=90 and <110	Similar
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<50	Extremely Low

Appendix Table 3: Labour force and commute

Attribute	Benchmark: SK		North Battleford CMA			Trade area		
	Value	Percent	Value	Percent	Index	Value	Percent	Index
Class of worker								
Total labour force 15 years and over by class of worker	690,430		11,397			21,463		
Class of worker - Not applicable	15,073	2.18%	315	2.76%	127	497	2.32%	106
All classes of worker	675,357	97.82%	11,082	97.24%	99	20,966	97.68%	100
Employees	564,693	81.79%	9,745	85.51%	105	17,009	79.25%	97
Permanent position	462,011	66.92%	7,702	67.58%	101	13,116	61.11%	91
Temporary position	102,683	14.87%	2,043	17.93%	121	3,894	18.14%	122
Fixed term (1 year or more)	26,999	3.91%	505	4.43%	113	790	3.68%	94
Casual, seasonal or short-term position (less than 1 year)	75,684	10.96%	1,538	13.50%	123	3,104	14.46%	132
Self-employed	110,664	16.03%	1,337	11.73%	73	3,956	18.43%	115
Place of work								
Total employed labour force 15 years and over by place of work status	653,866		10,761			20,182		
At home	53,695	7.78%	432	3.79%	49	1,433	6.68%	86
Outside Canada	820	0.12%	2	0.02%	17	7	0.03%	25
No fixed workplace address	98,228	14.23%	1,465	12.85%	90	3,008	14.01%	98
Usual place of work	501,122	72.58%	8,862	77.76%	107	15,735	73.31%	101
Commuting destination								
Total employed labour force 15 years and over with a usual place of work commuting destination	501,122		8,862			15,735		
Commute within census subdivision (CSD) of residence	339,146	49.12%	5,523	48.46%	99	7,843	36.54%	74
Commute to a different census subdivision (CSD) within census division (CD) of residence	115,298	16.70%	529	4.64%	28	3,555	16.57%	99
Commute to a different census subdivision (CSD) and census division (CD) within province or territory of residence	36,311	5.26%	2,599	22.80%	433	4,031	18.78%	357
Commute to a different province or territory	10,367	1.50%	212	1.86%	124	305	1.42%	95

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>=90 and <110	Similar
>=50 and <90	Low
<50	Extremely Low

Appendix Table 3: Labour force and commute (continued)

Attribute	Benchmark: SK		North Battleford CMA			Trade area		
	Value	Percent	Value	Percent	Index	Value	Percent	Index
Mode of transportation								
Total employed labour force 15 years and over who commute to work by mode of transportation	599,350		10,327			18,742		
Car, truck or van	548,451	79.44%	9,818	86.15%	108	17,420	81.16%	102
Car, truck, van, as driver	516,397	74.79%	9,140	80.20%	107	16,522	76.98%	103
Car, truck, van, as passenger	32,054	4.64%	678	5.95%	128	897	4.18%	90
Public transit	10,311	1.49%	26	0.23%	15	45	0.21%	14
Walked	27,770	4.02%	354	3.11%	77	1,078	5.02%	125
Bicycle	3,210	0.47%	1	0.01%	2	1	0.01%	2
Other method	9,608	1.39%	129	1.13%	81	199	0.93%	67
Commuting duration								
Total employed population aged 15 years and over with a usual place of work	599,350		10,327			18,742		
Less than 15 minutes	280,597	40.64%	7,260	63.70%	157	11,590	54.00%	133
15 to 29 minutes	217,765	31.54%	2,081	18.26%	58	3,949	18.40%	58
30 to 44 minutes	58,998	8.55%	472	4.14%	48	1,746	8.14%	95
45 to 59 minutes	18,549	2.69%	175	1.54%	57	624	2.91%	108
60 minutes and over	23,442	3.40%	340	2.98%	88	833	3.88%	114

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>=90 and <110	Similar
>=50 and <90	Low
<50	Extremely Low

Appendix Table 4: Labour force industry and occupation

Attribute	Benchmark: SK		North Battleford CMA			Trade area		
	Value	Percent	Value	Percent	Index	Value	Percent	Index
Labour force industry								
Total labour force population aged 15+ years - North American Industry Classification System (NAICS) 2017	690,430		11,397			21,463		
Industry - not applicable	15,073	2.18%	315	2.76%	127	497	2.32%	106
All industries	675,357	97.82%	11,082	97.24%	99	20,966	97.68%	100
11 Agriculture, forestry, fishing, and hunting	63,341	9.17%	547	4.80%	52	3,435	16.01%	175
21 Mining, quarrying, and oil and gas extraction	21,408	3.10%	176	1.54%	50	540	2.51%	81
22 Utilities	5,558	0.81%	124	1.09%	135	164	0.76%	94
23 Construction	54,355	7.87%	876	7.69%	98	1,687	7.86%	100
31-33 Manufacturing	30,823	4.46%	240	2.11%	47	356	1.66%	37
41 Wholesale trade	22,783	3.30%	245	2.15%	65	515	2.40%	73
44-45 Retail trade	75,933	11.00%	1,558	13.67%	124	2,279	10.62%	97
48-49 Transportation and warehousing	28,133	4.08%	371	3.26%	80	731	3.41%	84
51 Information and cultural industries	8,339	1.21%	106	0.93%	77	117	0.55%	45
52 Finance and insurance	21,985	3.18%	393	3.45%	108	517	2.41%	76
53 Real estate and rental and leasing	7,175	1.04%	183	1.61%	155	274	1.28%	123
54 Professional, scientific, and technical services	31,047	4.50%	326	2.86%	64	589	2.74%	61
55 Management of companies and enterprises	554	0.08%	0	0.00%	0	0	0.00%	0
56 Administrative and support, waste management and remediation services	19,300	2.80%	262	2.30%	82	440	2.05%	73
61 Educational services	56,654	8.21%	928	8.14%	99	1,994	9.29%	113
62 Health care and social assistance	100,675	14.58%	2,584	22.67%	155	4,075	18.98%	130
71 Arts, entertainment, and recreation	10,690	1.55%	299	2.62%	169	365	1.70%	110
72 Accommodation and food services	38,747	5.61%	848	7.44%	133	1,094	5.10%	91
81 Other services (except public administration)	30,363	4.40%	368	3.23%	73	579	2.70%	61
91 Public administration	47,494	6.88%	646	5.67%	82	1,214	5.65%	82

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Appendix Table 4: Labour force industry and occupation (continued)

Attribute	Benchmark: SK		North Battleford CMA			Trade area		
	Value	Percent	Value	Percent	Index	Value	Percent	Index
Occupation								
Total labour force 15 years and over by occupation	690,430		11,397			21,537		
Occupation - not applicable	15,073	2.18%	315	2.76%	127	500	2.32%	106
All occupations	675,357	97.82%	11,082	97.24%	99	21,036	97.68%	100
0 Management occupations	4,807	0.70%	24	0.21%	30	54	0.25%	36
1 Business, finance, and administration occupations	99,678	14.44%	1,386	12.16%	84	2,474	11.49%	80
2 Natural and applied sciences and related occupations	35,468	5.14%	194	1.70%	33	280	1.30%	25
3 Health occupations	59,914	8.68%	1,463	12.84%	148	2,318	10.76%	124
4 Occupations in education, law and social, community and government services	86,182	12.48%	1,476	12.95%	104	2,734	12.70%	102
5 Occupations in art, culture, recreation, and sport	11,520	1.67%	160	1.40%	84	204	0.95%	57
6 Sales and service occupations	162,488	23.53%	3,466	30.41%	129	5,271	24.48%	104
7 Trades, transport and equipment operators and related occupations	127,939	18.53%	1,991	17.47%	94	3,947	18.33%	99
8 Natural resources, agriculture, and related production occupations	66,182	9.59%	625	5.48%	57	3,231	15.00%	156
9 Occupations in manufacturing and utilities	21,179	3.07%	295	2.59%	84	523	2.43%	79

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>=110 and <180	High
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