downtown business association


# THE FUTURE OF RETAIL

IN DOWNTOWN EDMONTON

**DOWNTOWN BUSINESS ASSOCIATION OF EDMONTON**

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*To Support, Connect, and Enrich Edmonton's Downtown Community*

REPORT RESEARCHED AND WRITTEN BY:
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Photo Credit: Jeff Wallace

The Downtown Business Association (DBA) of Edmonton is proud to be providing value to our members and wants to ensure that we continue channelling our efforts to make Downtown more vibrant and inviting. Every year since 2004, the DBA has compiled a report on a topic of relevance to Edmonton's Downtown business community.

In this year's report, we discuss the changes in consumer shopping habits and analyze the preferences of consumers for shopping in Downtown Edmonton. We also discuss the factors that affect consumer shopping and how we can better prepare for the population infill that will be happening Downtown over the next 5-10 years to increase the quality of living in the Downtown neighbourhood.

## ABOUT THE DOWNTOWN BUSINESS ASSOCIATION OF EDMONTON

The Downtown Business Association's primary role is "To Support, Connect, and Enrich Edmonton's Downtown Community." The Downtown Business Association was formed through the establishment of a Business Revitalization Zone for Downtown Edmonton in 1985. This zone includes the area from 95 Street to 111 Street and from 97 Avenue to 105 Avenue.

More information about the DBA can be found at **www.edmontondowntown.com**

## OBJECTIVE

The Future of Retail and a growing Downtown, the theme outlined here is based on an assessment of the current retail landscape in Downtown Edmonton. The objective of the report is to study the Downtown neighbourhood, consumer preferences and shopping habits of the neighbourhood, and its demographics.

The DBA recently conducted an online survey to learn the preferences and habits of shopping by Edmontonians in 2018. An analysis of the psychographics, as well as extensive interviews with the various stakeholders, were completed.

### INTERVIEWS WERE CONDUCTED WITH:

- City of Edmonton
- Edmonton Tourism
- Representatives from major anchor stores
- Local business owners through in store visits
- Real estate professionals
- Retail consultants

## METHODOLOGY

Data was obtained at both the District- and City-Wide levels, including information from Statistics Canada, and the City of Edmonton Census. Employment and worker data was pulled from the City of Edmonton Census for Ward 6 and the Downtown neighbourhood.

Based on the findings from market analysis and feedback from the stakeholders, a framework was developed for strategic recommendations.

Mohammed Siddique, an MBA student, was hired by the Downtown Business Association to work on this year's project. Siddique presented his findings, feedback from the stakeholders and the survey responses were incorporated into the final recommendations and the industry best practises. In August 2018, the Consultant presented his findings and report to the members of the DBA, City Officials and the Edmonton local media.

The DBA ran a survey from June 7th to July 7th, 2018 with the residents of Downtown, employees working in Downtown and the Edmonton residents. For Demographics, the 2016 Municipal Census of Downtown, Municipal Census of Ward 6, Municipal Census of Edmonton and Superdemographics were used.

65% of the respondents were female, 32% of the respondents were male, 3% chose 'prefer not to say'. 16% of the respondents were within the age group of 20-29 years of age. 25% of the respondents were within the age group of 30-39 years of age and 21% were between 40-49 years of age. Together these age groups represent the majority of the survey respondents, around 62%.

**The report is divided into four key areas:**

**01.** BACKGROUND

**02.** DOWNTOWN PROFILE

**03.** SURVEY & ANALYSIS

**04.** STRATEGIES FOR RETAIL

# 01 BACKGROUND

## HISTORY OF SHOPPING

Jasper Avenue emerged as **Edmonton's Downtown main street in the early 1900's.** Popular storefronts on Jasper Avenue were King's Confectionary at 10455 Jasper Avenue, picture framing shops, laundries, a newspaper office, a movie theatre, Liquor, Cigar and Wine stores, among others.[12]

Fancy groceries, biscuits and confectioneries were popular items sold in the Horne and Pitfield Building. On Rice Howard Way, James Ramsey who was given the title Edmonton's **"Merchant Prince"** built Ramsey Department Store.[3] Gibson Block, constructed in 1913, in the characteristic triangular plan shape had ground floor commercial retail shop fronts that were girdled with a continuous wall of glass, and the basement had Turkish baths.[4]

**Norgate** was the first shopping mall in Canada,[5] an L-shaped strip mall built in the year 1949 in the Saint-Laurent borough of Montreal, Quebec. Park Royal Shopping Centre, built in 1950 located in West Vancouver is officially Canada's first covered shopping mall.

**CF Toronto Eaton Centre** put Canadian mall design on the world map, and it is North America's busiest shopping mall[6] and attracts an average of one million visitors every week.[7] In the 70s and 80s the enclosed "mall" had become a centre of social activity, often containing recreational amenities, culminating in the mammoth West Edmonton Mall.[8]

The 90s and early 21st Century saw the opening of **Power centres** – open-air planned clusters of big-box retailers. These suburban and regional shopping centres have had a

### Survey Findings

| | |
|---|---|
| Average survey completion rate | 87% |
| Total responses | 739 |
| Complete responses | 641 |
| Downtown residents | 113 |
| Central Core* excluding downtown | 58 |
| Downtown employees* | 253 |
| Edmonton respondents excluding the central core | 470 |

**Central Core includes the respondents just adjacent to DT includes the neighbourhoods of Oliver, Queen Mary Park, Riverdale and Rossdale, Boyle Street, Central McDougall, McCauley, Cloverdale, Garneau, Strathcona and the University of Alberta area.*

***Downtown Employees have an overlap with residents of Downtown, central core excluding Downtown and Edmonton respondents excluding central core.*

**LEFT:** Gibson Block, constructed in 1913, had ground floor commercial retail shop fronts [Photo Credit: Terry Lawson], **MIDDLE:** CF Toronto Eaton Centre put Canadian mall design on the world map [Photo Credit: Alan English **TOP RIGHT:** Jasper Avenue, 1925 [Library and Archives Canada], **MIDDLE RIGHT:** West Edmonton Mall [Photo Credit: Wikimedia commons] **BOTTOM RIGHT:** James Ramsey Store, Spring window display [Photo Credit: Glenbow Archives]

detrimental impact on downtown commercial areas. The power centres are called Category Killers, a category killer is a retail chain store that is dominant in its product category.[9]

## SHIFTS IN CONSUMER SHOPPING HABITS

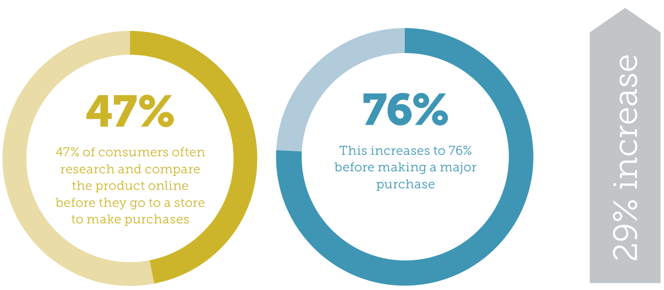
In the last few years, there have been several changes in customer shopping habits including, the growth of Omnichannel Retail, a fully-integrated approach to commerce that provides shoppers with a unified experience across online and offline channels, increase in the number of restaurants and food establishments and the growth of experiential retail. Consumers are seeking convenient and unique shopping experiences.

## EXPANSION OF E-COMMERCE

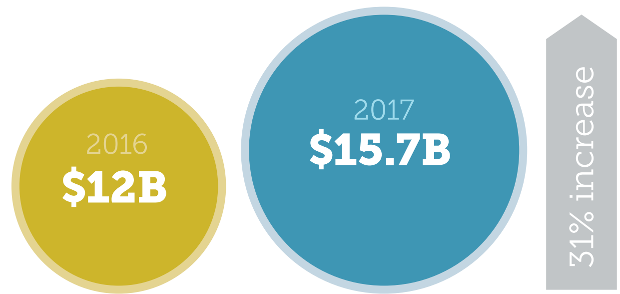
According to Statistics Canada,[10] retail e-commerce sales totalled $15.7 billion in 2017, accounting for 4.26% of the total retail trade. Year on year retail e-commerce increased 31%. This 31% increase from 2016 indicates that people are buying more online. So, what are Canadians buying online? The sales of electronics [32%], clothing and accessories [42%] account for a large portion of e commerce sales.

*In the 70s and 80s the enclosed "mall" had become a centre of social activity, often containing recreational amenities, culminating in the mammoth West Edmonton Mall.*

The rise of the internet is making an impact on retail sales in Canada. According to a survey done by the Canadian Internet Registration Authority (CIRA),[11] 47% of consumers often research and compare the product online before they go to a store to make purchases. This increases to 76% before making a major purchase. On the other hand, only 34% agreed




**ONLINE RESEARCH SMALL VS. LARGE PURCHASES**




**E-COMMERCE SALES IN 2016 VS. 2017**

that they first visit physical stores but then purchase online to get the best deal. The proliferation of mobile devices is leading consumers to combine online and offline shopping experiences.

In an interview with a major retail store Downtown, the general manager revealed that business experienced a spike in visitation after a new product launch and posting on social media. He also indicated that if the size or colour were not available in the store, the staff would direct them to make the purchase online. A new trend is that the brick and mortar locations serve as showrooms and engagement with the customer allows them to try the products or pick-up products.

## CHANGES IN CONSUMER DINING HABITS

The restaurant and food service industry growth rate[12] was a healthy 6.2% in 2016 and 4.9% in 2017. In 2018, the food service industry is expected to grow by 4.3%. Food purchased from restaurants – meals outside homes[13] in 2015 was $2,222 vs $2,303 in 2016 [+3.63%].

In Alberta, spending on meals outside homes is **higher** than the national average by 20.61%.[14] [15] The amount spent on meals was $2,680 in 2016 vs $2,754 in 2015 [-2.7%]. Although Alberta has this decrease of 2.7%, it is higher than the national average by a solid 20.61%.

According to a survey by Capital One Canada and Credit Canada,[16] 72% of Canadians overwhelmingly admit that restaurant food and take out are their most popular indulgence and top **"Guilty Pleasure".** After restaurants and take-out, Canadians treat themselves to daily coffee [50%]. One key reason for this shift in consumer habits is because they prefer not to cook at home and find it convenient to eat outside of the home.

In another survey of economic indicators conducted by the City of Edmonton, from September 2016 to September 2017 restaurants had the highest change of use, at around 25% and the top new use classes in the Downtown Business Improvement Area [BIA].[17] Previously, general retail stores represented the highest change of use at 34%. This does not reflect the existing businesses that didn't change their use.

## PREFERENCE OF EXPERIENTIAL RETAIL

In 2017 and early 2018, two major big-box stores filed for bankruptcy - Toys 'R' Us in the US and Sears. One of the main reasons for this retail apocalypse is that Canadian retailers are **not** keeping pace with changing consumer shopping habits. **Consumers are preferring curated retail concepts.**


**FAR LEFT:** Rise of the internet is making an impact on retail sales format in Canada [Photo Credit: Negative Space], **LEFT:** Sears filed for Bankruptcy in 2017 [Photo Credit: Mike Kalasnik], **RIGHT:** Rise of experiential retail- Millennial consumers want to shop for experiences as well as products [Photo Credit: Oxford Properties Group]

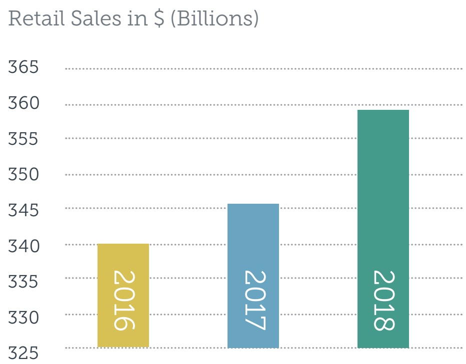
## *Consumers need to see the value of a physical store*

According to McKinsey,[18] Millennial consumers want to shop for experiences as well as products, and there is a rising demand for cooking classes, health and wellness sessions, makeup tutorials – this suggests that retailers should rethink the physical space as an experiential and entertaining setting. Consumers need to see the value of a physical store and stores, in turn, need to reimagine the brick and mortar locations and reassess their e-commerce strategy.

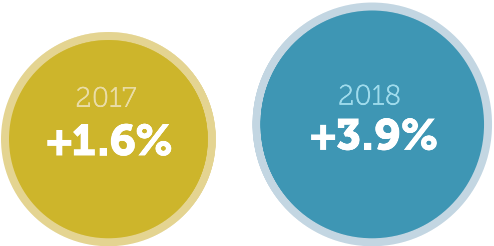
# Retail Statistics – Where we are Today

Total Retail Sales Growth in 2017 was a 1.67% increase from 2016. Investment in Retail for 2017 was at $692M, a 10.9 % increase from 2016. A major contributor to the increased demand was the stronger than anticipated economic recovery, which spurred retail growth. In the Downtown core, high-profile mixed use developments and densification efforts along corridors such as Jasper Avenue, which are likely to become very attractive for retailers.[19] However, investment in the second half of 2017 decreased, in both dollar volume and number of sales.

Total retail sales in Canada in 2017 were at $345 Billion, a 1.76% increase YOY. Year over year (YOY) is a method of evaluating the results at one time period with those of a comparable time period on an annualized basis. The Sears bankruptcy put much vacant space on the Edmonton market. As a result, the vacancy rate spiked to 5.5% in the second half of 2017 from 4.9% in the first half. Sears added 645K sq. ft. to the vacancy marketplace. New grocers such as Freson Bros. and US based Korean themed H Mart are scheduled to enter the Edmonton market in 2019.




**RETAIL SALES TREND**




**RETAIL SALES YEAR OVER YEAR SALES INCREASE**

# 02 DOWNTOWN PROFILE

## DEMOGRAPHICS:

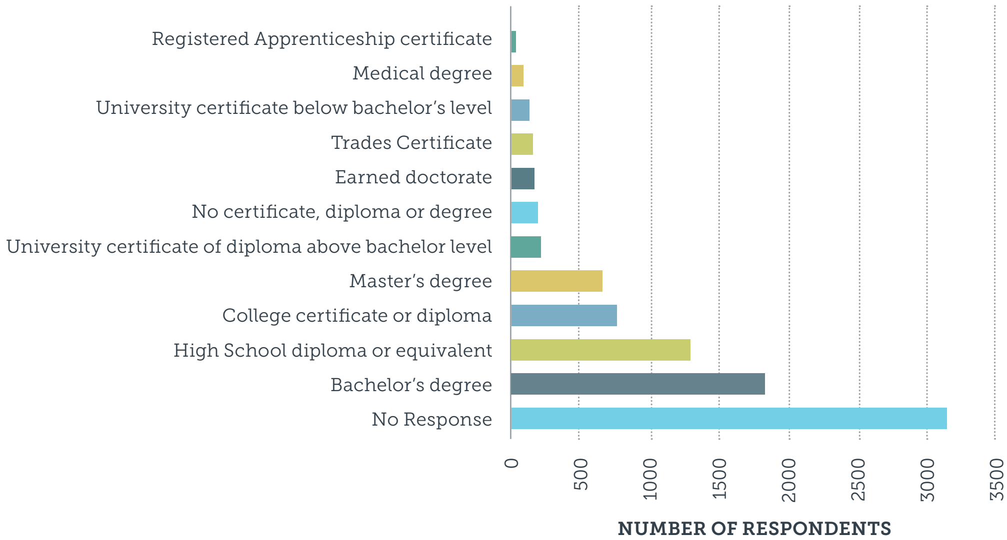
According to the 2016 Municipal Census,[20] the largest represented age group is between 20 and 39, where we have 5,011 residents, they represent 39.3% of the Downtown population. 25.97% of the residents are unmarried and are the maximum represented distribution.

Edmonton's population between age group [20-39] is 212,420 or 23.3%.The population in Downtown is **younger** [16%] compared to entire Edmonton for the age group between 20 and 39. **Millennials** make up the greatest proportion of the residential population. The age profile of the Downtown neighbourhood has a high distribution of 20–29 and 30–39 of 16% respectively. Age groups between 40–49 and 50–59 are evenly distributed at 6% each. Age groups above 60 and less than 85 represent 8% of the population.

## POPULATION PROJECTIONS:

Based on the City of Edmonton 2016 census data, the population of Downtown Edmonton has grown by 8% between 2012 and 2014, with a slight 3% decline from 2014 to 2016. The overall City of Edmonton population has increased by 2% from 2014 to 2016. Population is projected to grow due to a high density of housing. Details on the residential developments can be found at the end of the report.

### LEVEL OF EDUCATION OF RESPONDENTS

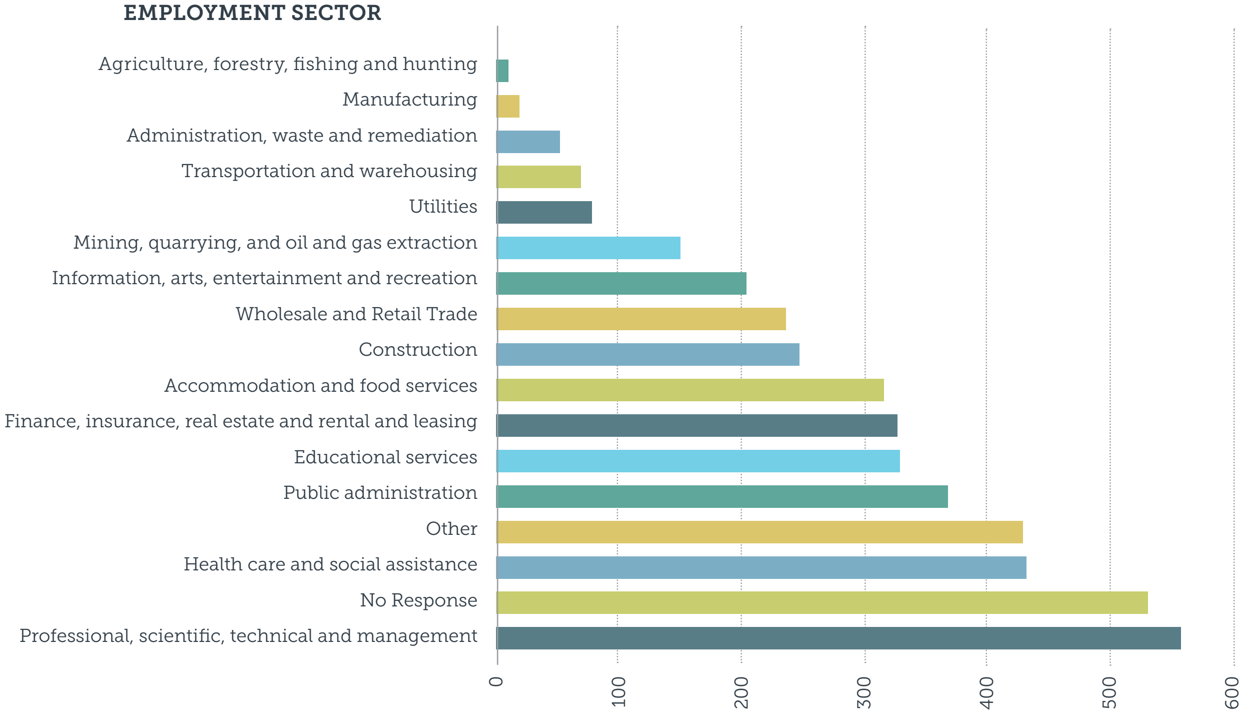


## EMPLOYMENT PROFILE:

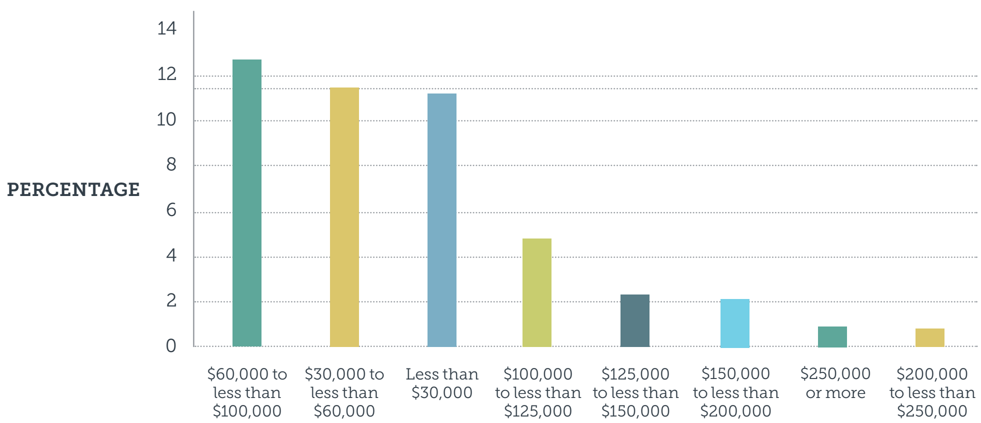
Downtown is a major employment centre, and its **working professionals are an important customer base.** The majority of professionals are employed at jobs exceeding 30 hours per week. According to the City's neighbourhood profiles, 21% of the residents hold a bachelor's degree above the city average of 18% and this is the highest bracket. Around 8% hold a master's degree around twice the city average of 4%.

There is a less than average of High School Diploma and equivalent at 14% compared to the City's 21%. The main employment categories which majority of the residents fall are professional, scientific, technical and management, public administration, finance, insurance, real estate and rental and leasing, educational services and health care.

### EMPLOYMENT SECTOR

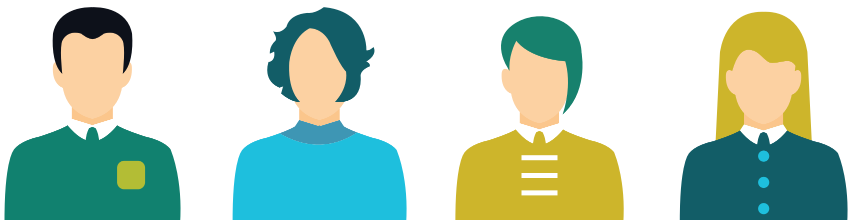



### HOUSEHOLD INCOME OF RESPONDENTS



## PSYCHOGRAPHICS:

A psychographic analysis was conducted to identify the different consumer groups in Downtown Edmonton to describe the characteristics of the residents. It helps to divide the market based on a variety of personality traits such as hobbies, values, personalities, and lifestyles and finds out who the buyer is and why they buy.



| Household Income | $70,000 | $100,000 | $60,000 | $60,000 |
|---|---|---|---|---|
| Ownership | Rent | Own/Rent | Rent | Rent |
| Education and Marital Status | Well-educated, Single/married | University educated and single | University educated and single | University/High School – single or married |
| Employment | White collar professionals/ service sector | White collar, middle income jobs | White collar or service sector, entry level jobs | Service sector |
| Interests | Active lifestyles- jogging, biking, and fitness centers | Socially very active, high disposable incomes | Active lifestyles- yoga and backpacking | Outdoor Sports |
| Shopping | Eat organic foods, sustainably sourced groceries. Brand-name apparel and latest trends | Independent boutiques. Shop latest trends | Image/ style-conscious | Image/ style-conscious |
| Social Habits | Frequent bars, nightclubs, art galleries | Frequent bars, coffee shops, and restaurants | Nightclubs, concerts, art galleries and festivals. | Frequent concerts and nightclubs |

Photo Credit: IQRemix

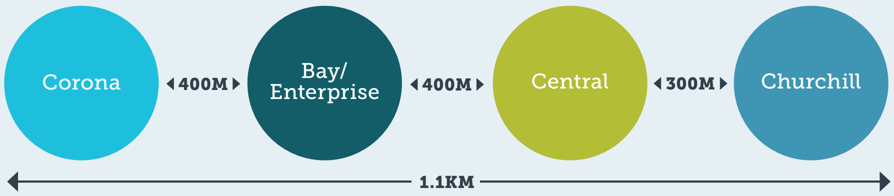
## WALK SCORE

- Walk Score
- Walkable Neighbourhood Rank
- Transit Score
- Walk Score of 75 or less and Transit Score of 60 or less

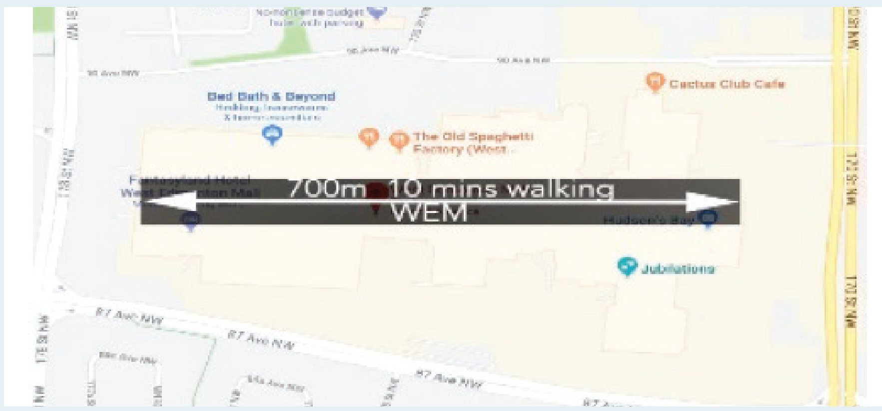
| Neighbourhood | Walk Score | Walkable Neighbourhood Rank | Transit Score |
|---|---|---|---|
| Downtown | 91 | 1 | 75 |
| Oliver | 82 | 7 | 60 |
| Westmount | 75 | 20 | 50 |
| Glenora | 57 | 89 | 49 |
| Garneau | 89 | 2 | 57 |
| Strathcona | 83 | 5 | 51 |
| Rossdale | 87 | 3 | 73 |
| Queen Mary Park | 75 | 22 | 55 |

Walk Score's mission is to promote walkable neighborhoods. Walkable neighborhoods are one of the simplest and best solutions for the environment, our health, and our economy.

Distance between downtown's LRT stations.




750m is the shortest distance that takes 9 mins to walk from one end to the other end – Hudson's Bay to the Aligra Liquor Store in West Edmonton Mall.




## RETAIL IN DOWNTOWN:

**Jasper Avenue is Downtown's main street.** Edmonton's oldest independent bookstore, Audrey's Books Ltd., is a place for local and visiting writers to meet readers and book lovers. The Shops at Commerce Place are also located along Jasper Avenue. Shopping here includes retail stores specializing in luxury timepieces and jewelry. Shop custom clothing or visit the Sunterra market for affordable, fresh, wholesome food within Commerce Place.

**4th Street Promenade:** Here you will find some of Downtown 's favourite hangouts, restaurants and shops that include unique boutiques, premium men's wear and many more.

**Edmonton City Centre:** Downtown's largest shopping destination. Here you will find over 100 shops and services spread out over four floors. Major tenants include Hudson's Bay, SportChek, Winners, and Landmark Cinemas. Additionally, a brand new, modern food court has opened on the top floor.

## UPCOMING:

**ICE District:** The retail in ICE District is located within five minute walk of 8,700 total residents and within ten minute walk of over 13,300 total residents. It will have a total of 300,000 sq. ft. of premium retail spaces that will make this a **retail destination.**

**Proposed stores** are Rexall Drug Store, a grocery store, a fitness centre and potential high end movie theatre. It is within 10 minutes walk from three LRT stations [Corona, Bay/ Enterprise square, Churchill ] and just opposite the MacEwan station. The retail podium section of the development is expected to be completed in 2019/2020.

**City Centre Mall–New Development:** City Centre Mall underwent a renovation at a cost of $41.3M that added a new foodcourt and new parking. The next proposed plans pending approvals are to make the exterior of mall more interactive with the streets, aiming to be a **top destination** in Downtown.[22]

**Expansion of the cannabis industry:** Aurora Cannabis recently signed a deal with Liquor Stores NA, the deal would provide both companies to establish retail footprint in Edmonton. A number of other applicants have shown interest in setting up retail space Downtown on Jasper Avenue and other Downtown areas. The cannabis industry ramps up for the legalization date of October 17, 2018.[23]

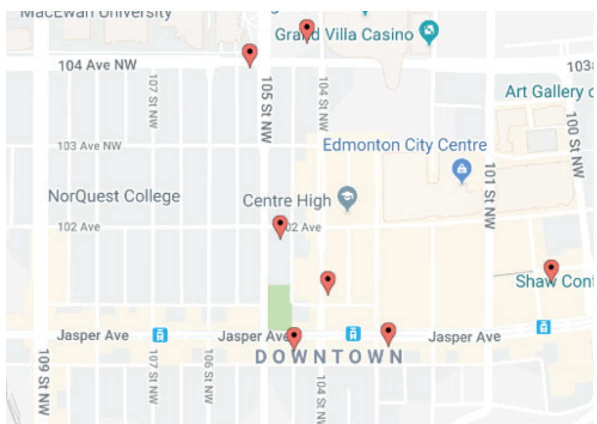
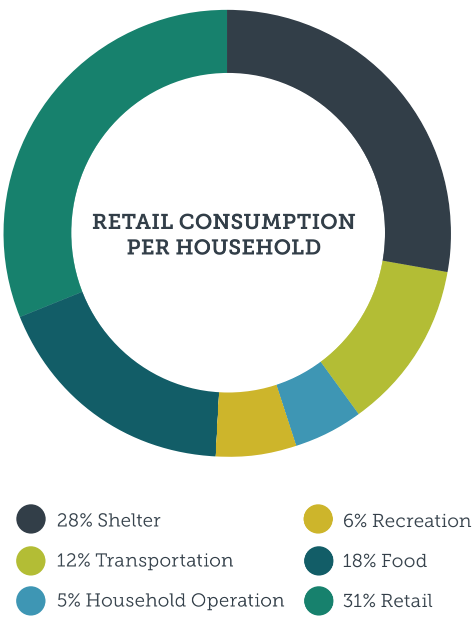



Figure: Map showing the proposed location of Cannabis retailers in the Downtown Area


ICE District will have premium retail spaces and will be a retail destination. [Photo Credit: Jeff Wallace]




[Source: Environics]

## POPULAR SHOPPING DISTRICTS IN EDMONTON

**1. West Edmonton Mall** – The largest shopping mall in North America, a destination shopping venue, with over 800 stores, nine attractions, two hotels and over 100 dining venues.

**2. Southgate Centre** – Connected by LRT from Downtown, ranks fifth in the country in sales per square foot.

**3. Kingsway Mall** – Connected by LRT from Downtown, it is the second largest mall in Edmonton, behind West Edmonton Mall. The mall contains over 200 stores.

**4. South Edmonton Common** – Retail power centre spread over 320 acres and is the largest open-air retail development in North America.

**5. Oliver Square/Village and Brewery District** – located just west of Downtown.

**6. 124 Street** – Popular shopping district, has local independent restaurants, coffee shops, and boutiques.

**7. Whyte Avenue** – Popular shopping district, has local independent restaurants, coffee shops, and boutiques.

### POPULAR NEARBY SHOPPING DISTRICTS

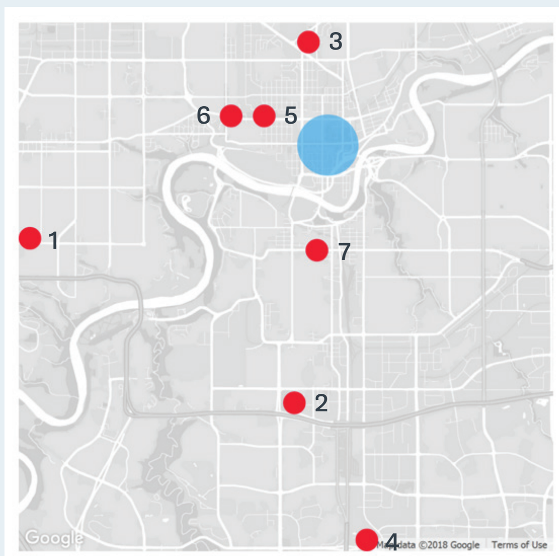



Figure: Map showing the popular nearby shopping districts.

# 03 SURVEY & ANALYSIS

Last year, Dining, Festivals and Live Performances were the top three reasons people came Downtown. This year Dining retains the top spot at 70%, a 6% increase from last year. Shopping was at just 17% last year; this has increased to 45%, a solid 28% increase. With a recovery of the economy, the retail sector is expected to grow.

**WHAT IS THE TYPICAL PURPOSE OF YOUR VISIT TO DOWNTOWN OTHER THAN WORK?**

| Answer Choices | Responses |
|---|---|
| Dining | 70.00% |
| Festivals | 45.63% |
| Shopping | 44.69% |
| Live Performances/ Concerts | 38.91% |
| Sporting events | 26.09% |
| Other (please specify) | 21.72% |
| Bars/ Clubs | 19.38% |
| Visit a Gallery/ Museum | 18.13% |
| Visit Family/ Friends | 15.31% |
| Conferences/ Seminars | 11.09% |
| Education | 4.38% |

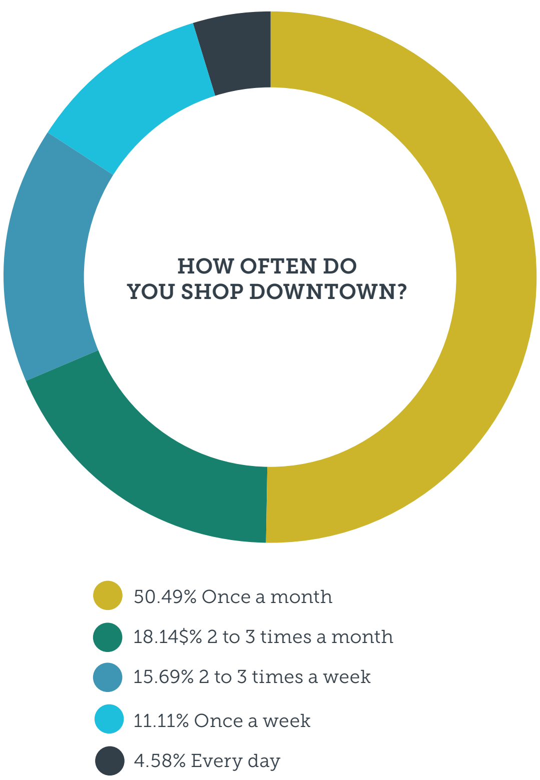
Table: Shows all respondents*chart for percentages

**RESPONDENTS BY LOCATION:**

| Area | Count | Percent |
|---|---|---|
| Southside | 161 | 25.1% |
| Northside | 101 | 15.8% |
| Westside | 87 | 13.6% |
| East | 29 | 4.5% |
| Greater Edmonton | 92 | 14.4% |
| Central core excluding Downtown | 58 | 9.0% |
| Downtown | 113 | 17.6% |
| Total | 641 | 100.0% |

**EMPLOYEES:** Of respondents who work Downtown, 26% said they shop two to three times a week, 15% percent said they would shop once a week, and around 23% said they would shop two to three times a month. Excluding the males, the results show a variation of 1–2%. This shows both genders who work Downtown have similar shopping patterns.

**RESIDENTS:** 37% of them shop two to three times a week. Dining is popular with residents at 86% as their main reason to visit Downtown apart from work and 64% choose shopping [ranks 2nd].



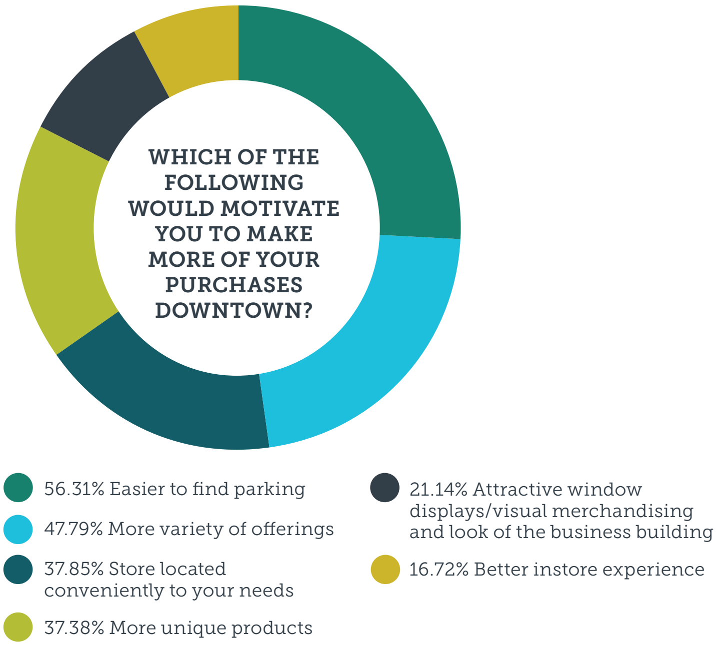

**CENTRAL CORE excluding Downtown:** Shopping is even more pronounced for the residents of the Central Core [Includes the areas of Oliver, Queen Mary Park, Riverdale and Rossdale, Boyle Street, Central McDougall, McCauley, Cloverdale, Garneau, Strathcona and the University of Alberta], 67% of the respondents say that their main purpose of visiting Downtown is to shop; 30% of them shop two to three times per week Downtown. Dining is more pronounced for these residents as they are in proximity to Downtown and explore the various Downtown restaurants is at 83%.

**EDMONTON excluding Central Core:** 60% said they shop once a month, 19% said they would shop two to three times a month, and around 10% said they would shop once a week. The ratio of male to female respondent is 3:7. Females are more than twice the male respondents.

**In all other categories again, the ratio of male to female respondents is 4:5.**


## MOTIVATION FOR SHOPPING DOWNTOWN

When asked about the reason that would motivate the respondents to shop Downtown, around 56% voted that **easier to find parking would be the top motivator.** More variety of offerings followed by more unique products and conveniently located stores. These factors are important as the respondents want variety, products that are unique and conveniently located. In another survey conducted by the City of Edmonton, when asked about the variety of shopping or retailers, 52% agreed. The respondents suggest that the parking in Downtown needs to be accessible. Metered Parking is comparable with Downtown Calgary and Vancouver, where metered parking is significantly more expensive.




**Attractive Window Display:** Retail window display is one of the most powerful tools in a retailer's arsenal of tools to stand out, whether a pop up store or an independent retailer. A compelling window display differentiates you from your competitor and draws in more traffic. It is one of the main points of contact and will get your attention. The right window design will engage the shoppers, stop them, and compel them to walk into the store where employees can complete the sale. The idea is to visually talk about your brand and offerings to the shopper, what the store stands for and why they should walk in.

### MOTIVATIONS ACROSS CATEGORIES

| | Residents | % | Employees | % | Central Core ex. Downtown | % | Edmonton excluding Central core | % |
|---|---|---|---|---|---|---|---|---|
| Top Motivation | More variety of offerings | 67 | More variety of offerings | 66 | More variety of offerings | 62 | Easier to find parking | 65 |
| 2nd Top Motivation | Store located conveniently to your needs | 64 | Store located conveniently to your needs | 45 | More unique products | 45 | More variety of offerings | 42 |
| 3rd top Motivation | More unique products | 37 | More unique products | 43 | Store located conveniently to your needs | 34 | More unique products | 37 |

*Retail window display is one of the most powerful tools in a retailer's arsenal of tools to stand out, whether a pop up store or an independent retailer. A compelling window display differentiates you from your competitor and draws in more traffic.*

**Parking:** Navigation is available through GPS or mobile devices. In addition to this, a larger wayfinding system that incorporates signage alerting motorists to the availability of off-street parking. Parking is critical for consumers and retailers.

Parking is arguably the most important requirement; the survey respondents chose easier to find parking as the top motivations - around 55% - to make more of their purchases Downtown.

- It is difficult to replicate the free parking that is available in suburban shopping centres, if done would have solved the greatest dilemmas of urban locations. Parking prices are set to control the flow of traffic and revenue generation optimally.
- It is a challenge to squeeze large parking lots right opposite the stores, as we move towards improving the pedestrian environment.
- **Urban shoppers** usually arrive by transit, bike or foot as seen through the table for motivations across categories
- The City is moving towards **automated parking** where there is no need for a physical attendant to write tickets.

There are multiple parking options available in Downtown with daily and monthly options – surface lots and undergound parking facilities. Impark lists around 50 parking locations in the Downtown area. They also have amenities such as Electric chargers, valet parking and on-site attendants at some locations. They also show nearby transit locations if they would like to park and take public transit. Other popular parking options are available through Parking Panda, Diamond Parking, Advanced Parking, Shaw Conference Centre, EPark and the City of Edmonton Parkades, to name just a few. On street parking is essential for the street front retailers. The parking spaces should be clean. Dirty and poorly lit parking garages with confusing signage give the impression that the nearby services and goods are low-value and poor quality. A staffed station provides an additional welcoming feeling of safety to the shops.

## Did you know?

On-street parking machines: Parking is free on Sundays and Statutory Holidays and $1/Hr on Saturdays.

**The on-street parking is free from 6pm to 9am, except event nights.**

On Weekends, in city parkades at Canada Place and Library Parkade, the parking is only "One Dollar for the first 3 hours," and in the City Hall's parkade it is "Fifty Cents per hour." The parking at the city parkades is free on all Statutory Holidays.

Manulife Place charges reduced rates for Saturday parking $1 for every 90 mins, and parking is extended for three hours for free, between [6am – 5:30pm]. Also, you can purchase 24-hour parking at Manulife Place for just $6.

City Centre Mall parking, operated by Advanced Parking Systems has reduced parking rated for evenings [until 6am next day] and weekends at a flat rate of $5, from [6am to 6pm].

Price ranges from $2.50 to $6 per hour for the various locations and reduced rates on weekends.

### WHAT TYPE OF STORES WOULD YOU LIKE TO SEE IN DOWNTOWN?

**Grocery was ranked first,** 55% of the respondents say that they would like to see another grocery store Downtown, followed by women's clothing and pop-up stores.

Multiple convenience stores are present in Downtown, such as 7-Eleven and others. Save-On-Foods on 109 Street, is on the west border of Downtown. **There is a need for another full-size grocery store.** Sobeys Urban Fresh was a grocery store in Downtown that shut down in July 2014.[24] United Grocers is another popular grocery store. Shoppers Drug Mart has three locations Downtown; selling such basic essentials as milk, eggs, frozen pizza, herbal teas and specialty bread.

**The proximity of Stores:** According to a survey by Neilson,[25] in North America, the primary reason for respondents [55%] to shop is to stock up on the household essentials and grocery. Around 34% say that they would buy a few essential items or buy something they have run out of and make a quick trip, and to buy a prepared meal for the day. Without the presence of another large grocery store, the shoppers and residents will be left with limited options either to buy at small convenience stores [7 Eleven or similar] or buy essentials at a combined drugstore [Shoppers Drug Mart]. This revenue will be lost to competitors such as Safeway in Oliver Square or grocery stores in the surrounding areas.

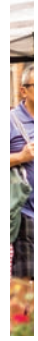
**Farmers Market:** The City Market has fresh and quality products from local farmers and artisans. It is operational year-round every Saturday from 9am to 3pm, outdoors in the spring and summer and moves indoors during the winter months. The market has been operating in Edmonton for more than 100 years, since 1903. The vendors stock the best products: available here are products that are organic, sustainable, and free range.

**Key success factors:** The Vendor selection process for the market is key to its success, they choose primary producers (those who produce the majority of their product directly from the land) and they regulate the vendors chosen to create a sustainable Market Mix (selection of product) to promote diversity of vendors and vendors that compliment to create a vibrant market.

According to Andrew Evans, National Geographic's digital nomad who spends the majority of his time travelling the world, in his list – **"Andrew's List: BEST of 2013"** recognised Edmonton's City Market as the best Farmers' Market in the world.[26]

*Ad agency Moosylvania[27] analyzed 15,000 responses from millennials and compiled a list of 100 top brands collected over five years, the top brands are Best Buy, Apple, H&M, Gap, Michael Kors, Sephora, Coach and Nordstrom.*

*Other popular brands are MAC, Sephora, Victoria's Secret, Gap, Urban Outfitters, J. CREW, Zara, H&M. These brands also offer menswear.*




- 54.56% Groceries/Food
- 44.50% Clothing stores for women
- 37.11% Pop-up stores
- 35.53% Department Stores
- 24.37% Clothing stores for men
- 22.96% Hardware/Home Improvement/Furniture
- 17.30% Books
- 12.26% Sporting Goods
- 7.39% Home Appliances/ Electronics
- 6.60% Drugstore items


From left to right: City Market on 104 Street [Photo Credit: Siddique], Holt Renfrew [Photo Credit: Siddique], The Curated Shop Pop-Up store, Edmonton City Centre [Photo Credit: Oxford Properties Group

### CHOICES ACROSS CATEGORIES

| | Residents | % | Employees | % | Central Core ex. DT | % | Edmonton excluding Central Core | % |
|---|---|---|---|---|---|---|---|---|
| 1st Choice | Groceries/Food | 86 | Groceries/ Food | 70 | Groceries/ Food | 62 | Groceries/ Food | 47 |
| 2nd Choice | Hardware/Home Improvement/ Furniture | 43 | Clothing Stores for Women | 42 | Clothing Stores for Women | 43 | Clothing Stores for Women | 46 |
| 3rd Choice | Clothing Stores for Women | 39 | Pop-up stores | 36 | Clothing Stores for Men | 36 | Pop-up stores | 41 |

**Examples of independent stores operating on 104 Street:**

**Evoolution** – specializes in premium olive oil and aged balsamic vinegar.

**Jacek Chocolate Couture** – Hand-crafted chocolate made using fine French chocolate.

**The Helm Clothing** – An upscale menswear boutique, focused on premium made to measure, bespoke and ready-to-wear tailored clothing for men

**habitat etc** – Is a friendly lifestyle store specializing in home goods, accessories, paper goods and gifts. They specialize in unique, local, handmade, high quality and artisanal products.

**Clothing:** A variety of Women's clothing options are available in Downtown. Multiple options are available for women's clothing at Hudson's Bay and stores such as Ardene, Cleo, Talbots, LeChateau, Suzy Shier, Blu's. Holt Renfrew at Manulife Place has premium women's clothing featuring brands such as GUCCI, Armani, Chanel and Louis Vuitton. It is a destination retail store, and their only store in Edmonton. Winners is a perfect place for the fashion conscious on a budget.

Ad agency Moosylvania[27] analyzed 15,000 responses from millennials and compiled a list of 100 top brands collected over five years, the top brands are Best Buy, Apple, H&M, Gap, Michael Kors, Sephora, Coach and Nordstrom.

Other popular brands are MAC, Sephora, Victoria's Secret, Gap, Urban Outfitters, J. CREW, Zara, H&M. These brands also offer menswear.

**POPULAR BRANDS AND THEIR LOCATIONS IN EDMONTON**

| Brands | Kingsway | Southgate | Whyte Avenue | Oliver Square/ Village & Brewery District | West Edmonton Mall | South Common |
|---|---|---|---|---|---|---|
| H&M | ● | | | | ● | ● |
| FOREVER 21 | ● | | | | ● | |
| ZARA | | ● | | | ● | |
| lululemon athletica | ● | ● | ● | | ● | |
| MK MICHAEL KORS | | ● | | | ● | |
| SEPHORA | ● | ● | | | ● | ● |
| TIFFANY & CO. | | | | | ● | |
| Apple | | ● | | | ● | |
| COACH | | ● | | | ● | |
| town shoes for the love of shoes | ● | ● | | | ● | ● |
| BED BATH & BEYOND | | | | | ● | ● |
| MEC | | | | ● | | ● |

*According to a study done by Ready Cloud, 88% of shoppers are "webrooming" regularly browsing online before purchasing in a store.*

One of the metrics used to access the health of a retail store is to examine its sales per square foot to determine the viability of the business. Usually, the stores operating in malls share their sales data with the developers. This metric is also available through market research companies. The expenses of the company are dependent on many internal factors and can be used to refine the selection further. CSCA, The Centre for the Study of Commercial Activity, at Ryerson University compiles Retail 100[28], a list of the top 100 retail conglomerates operating in Canada as ranked by total estimated retail sales on a yearly basis.

Based on the shopping habits of the represented demographics and reviewing their habits through psychographic analysis, the following brands are suggested as an option, and their locations in neighbourhood shopping locations is listed, as many respondents suggest the rents in Downtown are high, along with sales per square foot, Sales per stores metric are included. Apple and Lululemon both have high sales per square foot, in fact, both are in the top 10 and have very high sales per store.

Lululemon is a cult favourite active brand wear and a favourite among yoga lovers. Whether is the morning jog or the brunch, thanks to its fashionable styles.

H&M and Zara are some of the popular fast fashion stores, breaking ground in bringing new fashion, new design, and new ideas quickly to its stores.[29]

Where do women on the hunt for a good dress or some office attire go?

**Pop-Up Stores:** Manulife Place is giving out two units in their retail space. The winners of the Pop-Up contest can set up their stores and no rent charged for three months. At the end of three months, the stores can extend their lease or decide to vacate. Previous pop-up stores at Manulife Place were Poppy Barley and So Pretty Cara Cotter. City Centre Mall also

*39% of the shoppers patronize pop-ups as their products are new and unique and 61% said they prefer pop-ups as they offer seasonal products.*

has units that they are willing to lease to new upcoming brands by setting up their pop--up stores and have put up an advertisement.

Tie up spaces with pop-up stores during the Holiday season, or a store sale. According to a survey by PopUp Republic,[30] 39% of the shoppers patronize pop-ups as their products are new and unique and 61% said they prefer pop-ups as they offer seasonal products. Not just upcoming store owners, but seasoned retailers can use a pop-up to test an emerging market, to reduce surplus inventory and increase branding opportunities.

**Low commitment** – By selecting the demographics that match with your product, and you can start in a vacant storefront, as landlords are willing to let the pop-up store concept fill the gaps until they find a suitable long-term tenant. Popular brands such as Indochino, which offers bespoke men's wear, started testing their product with the pop-up concept.

According to a study done by Ready Cloud,[31] **88% of shoppers are "webrooming" regularly browsing online before purchasing in a store.** This creates a sense of scarcity, because people need to take action, i.e. buy, during the time the pop-up is present. Because a pop-up store is temporary by nature, shoppers are less likely to delay purchases. This works even better when the product in the pop-up is unique

**Customer Insights** – One other benefit of pop-up stores is that they get valuable customer feedback. As the store is usually small, it gives a chance to ask the customer feedback about the offering. This principle becomes even more important if the product is a new offering. Testing whether the product will get consumer acceptance and ways to improve it.

*Street appeal is key to developing a successful storefront. In another survey by Morpace Omnibus, consumers said they decide whether or not they will shop at your store based on its presentation from the street.*




TOP: Clean Streets, entrances utilizing natural light, clear signage and a clean/crisp overall design are key to lure customer from Pathway to Doorway [Photo Credit: Monocle], MIDDLE: Bright colors and a large storefront window, maximize the visibility of the store [Photo Credit: CC0 no attribution] BOTTOM: Figure: Interactive dynamic map of Downtown Cleveland, Ohio that shows the attractions, hotels and restaurants, each as a separate layer. The layers can be toggled on and off.[Photo Credit: Destination Cleveland]

## AGREEMENT WITH STATEMENTS THAT WOULD ENCOURAGE SHOPPING DOWNTOWN

Respondents were offered a list of statements and requested the level of agreement that would encourage them to shop Downtown.

### Storefronts on the main street need to be clean and presentable.

93.42% agreed, and 3.13% disagreed

According to a study by Harris Interactive, 86% of consumers said that dirty floors negatively impact the perception of a retail store. By pressure washing the exterior of your building, you can create a storefront that invites your customers. Lure the consumers from Pathway to Doorway. **Street appeal is key to developing a successful storefront.** Keep your windows, doors, and pathways clean.[33] **In another survey by Morpace Omnibus, consumers said they decide whether or not they will shop at your store based on its presentation from the street.**[34]

### More Information is needed about the Pedway routes.

77.08% agreed, and 13.66% disagreed

### Signage/wayfinding helps navigate stores in Downtown

83.07% agreed, and 10.66% disagreed

The city is working towards updating the signage/wayfinding at multiple locations Downtown. A GIS map that has multiple layers that can be toggled on and off to view the desired information would be a helpful tool. The pedway is useful especially during winter when the temperatures are very cold. The city allows pedways to be constructed between private properties. The private property owners decide the hours the pedway remains open. **A video would be helpful showing some of the popular routes and other less known routes.** This is also beneficial when customers decide to park at a location that has lower parking rates and walk to shops.

### Employees need to have specialized knowledge of the products in the store.

77% agreed, and 9% disagreed

Showrooming is a practice of examining merchandise or products in a store and then buying it online for a lower price.[35]

**Employee Knowledge: Apart from price comparison,** one of the main reasons the customer is using the phone is to find more information about the product. For example, let's say the customer is deciding between two products and the employee can clearly explain the pros and cons and the difference between the products, they are in a better position to persuade the customer to purchase at the store. Through specialized product knowledge employees can convince a customer who appreciates great customer service and personal touch, to purchase at the store.

If the employee is not able to explain all the above details, then the customer will search for the information online and may buy it online at a lower price.

If the product is available elsewhere, then showrooming is a challenge for retailers. **According to a study by JiWire, 61.5% of the shoppers use the in-store wi-fi for price comparison.[36] The same study also found that 44% say that the availability of in-store wi-fi influences where they shop.**

### Stores should combine complimentary workshops/ classes in store for customers.

47% agreed, and 22% disagreed

## Case Study: DAVIDsTEA


DAVIDsTEA offers free samples of a feature teas, without pushing to purchase it. Whether it's the in-store employees or social media, the staff is trained to answer all the questions and the 150 varieties of stocked teas. The staff attend a nine-hour tea training session and receive on-the-job apprenticeship-style learning to enhance their knowledge of tea further.[37]

According to an article by the B2B news, DAVIDsTEA responds to almost every criticism or question via its Twitter account, answering queries within 20 minutes at times. This kind of customer service gets noticed.[38]

**Price matching:** In another strategy that can tackle showrooming. Best Buy matches the price if you find an identical product available at a local retail competitor store, even Amazon.

*Through specialized product knowledge employees can convince a customer who appreciates great customer service and personal touch, to purchase at the store.*

**TOP:** Jessica Hische shares her perspective and techniques during a Live Art session, part of "Today at Apple". [Photo Credit: Apple Newsroom] **BOTTOM:** Enhance Your Backyard Living Space, Do It Yourself free workshops by Home Depot. [Photo Credit: Home Depot]

*Keeping a customer is very important; they are more knowledgeable than ever, more likely to switch for a better deal, more personalized service, or superior products.*

## **Case Study:** Apple

Apple offers programs **every day in-store.** Some of the program categories that Apple has are **business, music and photography.** These are hands-on sessions called "Today at Apple". Lessons range from how-to guides to professional level programs. The retailer is trying to create an environment where people can test, talk and learn all things Apple. Apple's goal is to increase sales, as sales for the past quarters have dipped and they want to strengthen the bottom line.[39]

## **Case Study:** Home Depot

Home Depot also has DIY classes for females called Do-It-Herself and Kids Workshops; examples include teaching kids how to build their own bookends. **At Home Depot, do-it-yourselfers made up more than 60% of the building supply industry's sales volume,[40]** but the majority of the buyers didn't have the knowledge or expertise to accomplish their home repair/ improvement projects.

The workshops increased customer knowledge and they returned to buy additional products for complex projects. From a sales perspective, products with better reviews have increased sales. Home Depot has a dedicated YouTube channel that has had over 81M views, a channel that acts as a destination for home improvement products and DIY project how-to videos.

### Stores need to offer tailored offerings to the customer.

65% agreed 16% disagreed

Big Data analytics is now being applied at every stage of the retail process – predicting popular products analyzing trends, forecasting product demand, optimizing pricing for a competitive edge, identifying the customer's segments and working out the best way to approach them, and lastly finding out what is the next thing they will need.

Keeping a customer is very important; they are more knowledgeable than ever, more likely to switch for a better deal, more personalized service, or superior products.[41]

Turn data into insights that generate revenue


Photo Credit: Cognizant


### I feel safe in Downtown in the day.

82% agreed with the statement that it would encourage them to shop in Downtown

### I feel safe in Downtown in the evening.

53% agreed that the statement would encourage them to shop Downtown, as the respondents perceive that Downtown is not as safe as it could be.

### Downtown has pedestrian-friendly traffic signal timing.

68% agreed that the statement would encourage them to shop Downtown.

Some of the respondents suggested that the pedestrian crossing wait times are long. At some locations Downtown, the button needs to be pressed to cross and if the pedestrians miss pressing the button the signal is not activated. This is one of the reasons for long wait times for pedestrians. The signals are timed to optimally control traffic flow at peak and off-peak times.

### There is effective communication of what's happening in Downtown.

72% agreed vs 31% in 2017, an increase over 2X 25% disagreed, a drop from 45% in 2017.

## Regarding perceived safety in Downtown, is there any issue you would like to highlight?

### Homelessness in Edmonton:

There has been a 43% decrease in the number of people identified as experiencing homelessness from 2008 to 2016.[42]

**DOWNTOWN RESIDENTS**

| | |
|---|---|
| Panhandling | 57% |
| Homelessness | 51% |
| Drug usage | 40% |

**EMPLOYEES**

| | |
|---|---|
| Panhandling | 57% |
| Homelessness | 51% |
| Drug usage | 35% |

**CENTRAL CORE EX DT**

| | |
|---|---|
| Panhandling | 47% |
| Homelessness | 40% |
| Drug usage | 20% |

**EDMONTON EX CENTRAL CORE**

| | |
|---|---|
| Panhandling | 53% |
| Homelessness | 53% |
| Drug usage | 32% |

**ALL RESPONDENTS**

| | |
|---|---|
| Panhandling | 54% |
| Homelessness | 51% |
| Drug usage | 34% |
| Visibility of EPS | 28% |
| Harassment | 19% |
| Vandalism | 15% |

### INITIATIVES TO END HOMELESSNESS:

**Homeward Trust:** Homeward Trust has been instrumental in providing leadership in how we address homelessness in our city. Since 2009, around **7,937 housings**[43] have been provided through the Housing First program.

**The Capital Region Interfaith Housing Initiative (CRIHI):** Started in 2011 with a commitment from 24 religious and spiritual community leaders[44] to end homelessness.

**Bissell Centre:** offers several housing services including Homeless to Homes, Community Bridge and Outreach Housing Team. Through the Homeless to Homes program, they provide Intensive Case Management services to 170 adults and children and 80 people in the Housing First program.

**Reaching Home:** Canada's redesigned Homelessness Strategy, has the Government of Canada committing increased resources toward the goal of ending homelessness and supporting the National Housing Strategy. A 10-year, $40-billion plan to lift hundreds and thousands of Canadians out of housing need, resulting in up to 100,000 new housing units and 300,000 repaired or renewed housing units.[45]

When asked about perceived safety in the Downtown, panhandling was the highest at 54% followed by homelessness at 51%. Drug usage was at 34%. Visibility of Edmonton Police Service was at 28%.

**EPS has many programs for Downtown such as the Downtown Beat Police that regularly patrol on foot and bikes.**

*"$230 million over six years is needed to house 4,000 homeless people"*
*- Homeward Trust*

### How do you normally commute to Downtown?

Walking is the first choice for Downtown residents, at 60%.

26% of Central Core residents excluding Downtown choose to walk. Bike ridership is high among Employees and Downtown residents and the central core. 70% of the employees use their vehicle and 42% use LRT to commute to Downtown.

| | Residents | % | Employees | % | Central Core ex. Downtown | % | Edmonton excluding Central core | % |
|---|---|---|---|---|---|---|---|---|
| 1st Choice | Walk | 60 | Personal Vehicle | 70 | Personal Vehicle | 34 | Personal Vehicle | 57 |
| 2st Choice | Personal Vehicle | 26 | LRT | 42 | Walk | 26 | LRT | 17 |
| 3st Choice | Bus | 5 | Bus | 36 | Bus | 24 | Bus | 14 |
| Bike | | 5 | | 6 | | 9 | | 3 |
| Car Pool | | 1 | | 4 | | 3 | | 3 |

### When asked do you think the City should offer incentives to attract new businesses/retailers to the Downtown area?

69% of the respondents said yes. 15% of the respondents said no. 18 % had no opinion

**Façade Improvement Program:** The program encourages commercial building owners to invest in façade renovations and storefront improvements. It matches grants to cover a portion of renovation costs. Grants cover up to 50% of renovation costs, to a maximum of $30,000 per building façade. Corner buildings may be eligible for up to $60,000.[46]

Benefits of the program include increased business exposure, more attractive streets, more inviting places to walk and shop, better first impressions for businesses, enhanced property values, and improved marketability of the local business area.

Development Incentive Program [DIP]: It has three programs – New Commercial Business Interior Improvement Grants, Commercial Development and Multi-unit Residential Development Reinvestment Program Grants. It encourages property owners in Business Improvement Areas to invest in higher density residential and/or commercial development. The programs provide grants to cover a portion of building or renovation costs. Grants may be provided to property owners who invest in new development, redevelopment, and/or conversion of their properties for mixed-use, multi-unit residential, and/or eligible storefront retail and commercial uses.[47]

Benefits include revitalization of main street areas with more places to live and shop, and enhanced property values.

# 04 STRATEGIES FOR RETAIL

## GET ONLINE

In a study, GoDaddy and Redshift surveyed 4,009 small businesses; 59% of Canadian respondents reported that they don't have a website, and only a third of those plan on building one.[48] Purely offline is a risky strategy as customers are spending more of their time online.

Purely offline is a risky strategy as customers are spending more of their time online. The web can play a huge part in measuring success by building offline relationships. In a recent study by CIRA, **63%** of consumers believe that having a website makes a business look more credible, and **26%** don't trust businesses without a website.[49]

Website builders are a perfect solution for individuals and small businesses to start a website without the expense of hiring a developer. A good custom website could easily cost $2,000.[50] Website building packages start from $10/month and changes can be easily made by uploading images or adding new pages. Wix, Weebly, Squarespace and WordPress are few of the popular website builders.

E-commerce platforms have higher prices than website builders, because they have added security and application add-ons such as inventory management for helping businesses build an online store. Shopify is a Canadian based e-commerce platform. For **$9 a month,** the businesses can integrate Shopify directly with your Facebook account and make it an e-commerce store.[51] Bigcommerce, Volusion and Magento are other popular e-commerce platforms.

### OMNICHANNEL

retailing is a fully-integrated approach to commerce that provides shoppers a unified experience across online and offline channels (e.g., touchpoints). True omni-channel shopping extends from brick-and-mortar locations to mobile-browsing, e-commerce marketplaces, onsite storefronts, social media, retargeting, and everything in between.[52]

A study by the Harvard Business Review[53] of 46,000 shoppers reveals Omnichannel retailing **increases revenue.**

An instore catalogue, a price checker, a tablet each count as a separate point. The omnichannel experience propels engagement with the retail brand and drives consumers to the store.

### SOCIAL MEDIA UPDATES

It is important for the new customer to get the brand's attention. Through Instagram, the business can provide updates when a new item comes in, or a popular item is back in stock. Businesses don't need to spend hundreds of dollars on social media marketing on Facebook. A study done by Scott Ayres, where $20 spent on a boosted post in Facebook, generated $2,400 in sales.[54]

**OMNICHANNEL**

| Parameter | Result |
|---|---|
| Spending | Spent 4% more in store |
| Spending after research online | 13% more in store |
| Spending | Spent 10% more online after visiting the store |
| Increased Loyalty | Logged in 23% repeat shopping trips. |
| Likeliness to recommend | Greater than compared to a single channel |

### CARE FOR YOUR LOYAL CUSTOMERS

One way of rewarding customers is by hosting giveaways and offers through your social media pages. For example with Facebook comments or through share and Twitter retweets. If a customer makes a purchase and posts a picture with the item on social media and tags your business, offer them a discount on the next purchase. Loyalty programs can generate as much as 20% of a company's profits.[55]

### PROMOTIONS WITH EXTENDED STORE HOURS AND BUNDLING

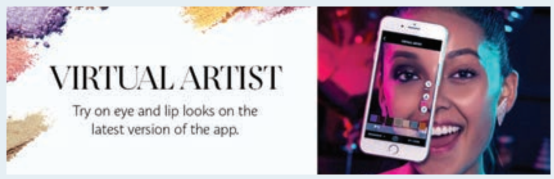
Several respondents have mentioned the hours of shopping need to be extended. Promotions intended to encourage more evening shopping by respondents and combine several evening downtown activities. This can be done by combining activities, such as dinner discount with proof of downtown shopping or a shopping discount combined with a meal at a Downtown restaurant.

To effectively build these promotions they need to be tested, ideally launched in summer and extended into the fall. Stores, restaurants and theatres can distribute flyers and the discount vouchers to generate awareness for the promotion.

## **Case Study:** Starbucks


The loyalty program engages with the customer and changes to the card can be viewed in real time across all channels – phone, website, store and the app.[56] Each time the customer checks the app they are greeted with a limited bonus offer to offer loyal customers with even more rewards. This keeps the customer engaged. The program makes up around 22% of the US franchise sales. The gold card program[57] makes the customer feel exclusive and important. The **gold card** gives the customer the physical representation of special status that acts as a strong motivator.

## **Case Study:** Sephora




Sephora's strategy is to put the video where shoppers need it most, whether the customer is looking for **inspiration** or looking to buy – on YouTube, Sephora.

websites, in stores or on mobile.[58] Currently, Sephora has more than one million subscribers on YouTube. In the store, Sephora has the **Color IQ**[59 60] program that uses digital devices to scan someone's skin to find the right shade for foundation, concealer, lip and powder product recommendations. For the app, Sephora has **Virtual ARTIST**[61] where a customer can take a picture and try the eye, lip and cheek makeup. If the customer is bored and needs inspiration, the app has created looks for daytime, nighttime, popular trends and events. The app shows which products are required to get the desired look. To top it up they have exclusive app offers. A study was done to measure the offline impact of Sephora's online strategy[62] - **3X increase in conversion rates and 13% uplift on average in-store order value.**

Figure: Bloor Street ©Eric Mutrie under CC 2.0

Figure: Stephen Avenue, Calgary ©Bernard Spragg under CC 2.0 © under CC 2.0

Figure: Queen St. West, Toronto ©Wyliepoon under CC 2.0

## POPULAR RETAIL STREETS IN CANADA

**Bloor Street, Toronto:** In 1970 Bloor Street was not the Bloor Street we know today. When the mall revolution began on the outskirts of Toronto, many businesses closed on Bloor Street The businesses formed an association [BIA], and they added lighted trees that sparkled, colourful flower boxes and benches that made shopping inviting.[63] The Downtown portion of the east-west artery has in just a few decades gone from a low-rise commercial district to the home of Holt Renfrew, and Chanel.[64] In the 80s and the 90s a few designer clothing retailers such as Armani, Dior, Versace and Valentino started selling on Bloor Street followed by Prada, Louis Vuitton and Chanel. According to Greg Menzies, Executive Vice-President of First Capital Realty, **"Chanel was a game changer for Bloor Street."** Mr. Menzies says that after Chanel entered Bloor Street, it changed the neighbourhood, and they got a lot of calls from fashion houses.[65] In 2008 Bloor Street underwent a transformation that included widened granite sidewalks, public art, new lighting and street furnishings, and continuous planting areas with mature trees, shrubs and flowers in raised beds. Since completion, the segment of Bloor Street has experienced a near **0% retail vacancy rate** and a significant increase in retail sales.[66]

*Greg Menzies, Executive Vice-President of First Capital Realty, "Chanel was a game changer for Bloor Street."*

**Stephen Avenue, Calgary:** Stephen Avenue in Downtown Calgary has major shopping centres/department stores, and a mix of boutiques and high-end retail[67] and was declared a historic site in 2002, a large concentration of heritage buildings contributes to the heritage character.[68] The walk is closed to vehicles from 6am to 6pm on weekdays. During this time it serves as a pedestrian walkway, encouraging a pedestrian-friendly environment and retail continuity that draws focus to retailers.[69] Stephen Avenue has the Galleria Trees sculptures located outside Bankers Hall between 2nd and 3rd Street SW. The sculptures are outfitted with state-of-the-art LED lighting systems. The lights add to the street level vibrancy and are programmed for special events and occasions and are equipped with an audio system.[70]

**Queen Street West, Toronto:** Queen Street West has several local and international retailers and is home to the Eaton Centre.[71] The change has happened over a period of 30 years. In the 1980s, it offered reasonable rates for students and designers, with a residential rate peaking in the 90s due to millennial migration. The street has multiple heritage


Figure: Mount Royal Avenue ©Wikimedia Commons


Figure: Shopping on Robson Street.
©GoToVan under CC 2.0

buildings that are mainly two to three floors that contribute to the heritage character. Retail on Queen Street is dynamic with common elements such as recessed entrances and single storey height for ground floor retail.[72] It has multiple art galleries and independent boutiques. In 2014, Queen Street West was named one of the 15 coolest neighbourhoods by Vogue.[73]

*In 2014, Queen Street West was named one of the 15 coolest neighbourhoods by Vogue.*

**Mont Royale Avenue, Montreal:** The avenue boasts one of the most creative neighbourhoods in North America. It has a selection of boutiques, bookstores, food stores, patios, vintage shops and restaurants.[74] The independent boutiques and stores are quite popular among its customer base. 32% of primary clientele visit Mont-Royal Avenue two to five times a week, 86% of primary clientele say they “feel at home” on Mont-Royal Avenue and each visit by a client results in an average expenditure of about $40.[75]

*86% of primary clientele say they “feel at home” on Mont-Royal Avenue and each visit by a client results in an average expenditure of about $40.*

**Robson Street, Vancouver:** One of the oldest commercial districts, it is Vancouver’s primary commercial high street, Robson Street is located in the heart of the Downtown core. The street starts with the Nordstrom store, luxury brands and various fashion labels such as J.Crew, Aldo, Zara, Banana Republic, Jaeger-LeCoultre Boutique, Gucci and Louis Vuitton. The tenant mix in Robson Street is mid-priced to aspirational luxury. The stores present options for both affordable to high-end **shopping.** Many hotels are located on or just across Robson Street such as Sutton Place, Fairmont, and Shangri-La Hotel, making it the exclusive **“stay and shop spot.”**[76]

*The tenant mix in Robson Street is mid-priced to aspirational luxury. The stores present options for both affordable to high-end shopping.*

## KEY TAKEAWAYS

### 1 City of Edmonton

Safety is important especially for women shoppers, around 19% of the survey respondents said harassment is an issue. For the same question, in the "other" option, many women have mentioned harassment as one of the deterrents for shopping Downtown. This is key for retail as shoppers need to feel safe. The city has many plans to end homelessness like affordable housing, and there is a perception problem about homelessness in Downtown, this is absolutely not true. Through marketing, these negative perceptions can be addressed.

Façade Improvement Program is quite popular, as evidenced by the fact that it is currently capped out. The funding for the Façade Improvement Program can be increased to allow more retailers to benefit from the program. The Development Incentive Program applies to the interior of a development. Other alternatives that can be explored are tax incentives or financial incentives tied to revitalizing retail.

*Increased connectivity when the Valley line is completed will certainly benefit retail in Downtown.*

*Retailers need to give employees a reason to linger during their lunch break, rather than the same cookie-cutter chains that they can visit during the weekend in other locations that also provide free parking.*

### 2 Retailers

Do the Downtown workforce, residents and shoppers know about the current shopping options we have in Downtown?

Strategies mentioned earlier such as social media presence and marketing are very important for the store to get the word out and create awareness of the brand and its location. Customers will not turn loyal over night. The relationship between the brand and the customer needs to be nurtured through loyalty programs, Omni-channel experience and/or exceptional customer service.

Are retailers addressing the large daytime employee population projected at 68945 in 2019?[77]

Retailers need to give employees a reason to linger during their lunch break, rather than the same cookie-cutter chains that they can visit during the weekend in other locations that also provide free parking. As paid parking will always be a challenge for shoppers in Downtown, from both last year's and this year's survey, the top deterrent for shopping Downtown. On street parking is free from 6pm to 9am, excluding event nights, and free on Sunday and Statutory holidays. On street, free parking can be extended to include Saturday after evaluating parking revenues. Free parking on Saturday will further benefit shopping and allow the retailers in Downtown to compete with the other shopping locations.

## 3 Developers

Developers need to rethink the long-term covenant attached to leases and the changing store format of retail. Retailers are re-evaluating the store size. While some retailers are closing down stores, others are moving to small store format in urban areas where rents are high and limited space availability. This is also an advantage for Downtown residents as they can have convenient store locations, it is also the 3rd popular choice in the survey that would encourage respondents to shop Downtown. Companies such as Target and Best Buy are opening a large number of small format stores.

Independent stores need to be carefully selected; their business model needs to be evaluated to check if they sustainable in the long run and also see what is that something unique that they are offering in Downtown that is not available elsewhere.

Popular national stores like density and large foot traffic, as increased foot traffic also lead to greater opportunities. Each store benefits from the traffic generated by neighbouring businesses. Foot traffic in the area is usually higher when businesses cluster together. Large national stores value return on investment and customer footfall.

Local independent retailers provide a personalized, authentic experience and identity to the Downtown retail scene. They add value to the neighbourhood by offering great items unlike what can be found at big-box retailers and also add appeal to the community itself. Customers value the improved customer service and product knowledge that independent stores can offer, one tailored to their wants and needs as a client. Developers need to adjust the rents to accommodate independent retailers.

"The relationships created between customers and those that work in independent business frequently go beyond just purchases — it becomes familial."[79] Rembert Browne from New York Magazine

*"Most independent businesses are run by people - not by boards, not by stockholders, not by algorithms. And so, you get a different kind of care and quality in their product because their work is a reflection of themselves. Instead of focusing on the next market they're expanding into or the next round of funding they're raising, they're focusing on the details and being the best they can be."*[80] Erica Cerulo and Claire Mazur, co-founders - Of a Kind, the store introduces exciting new designers by selling their pieces and sharing their stories, and since 2010, they have featured over 350 of America's most promising new makers.

### LOOKING AHEAD:

We can plan to great detail based on the demographics and spending pattern of the shoppers, but sometimes it comes down to creating something unique for Downtown and eventually people will come. The quote – **"If you build it and they will come," is the way forward.**

The next page has the residential development under construction or proposed, this will definitely add to the resident population. Increased connectivity when the Valley line is completed will certainly benefit retail in Downtown.

Explore options to revitalize retail and address the shoppers' and residents' concerns. A retail district plan can be created to be consistent with the overall goals of the community. It is important to understand and establish the community baseline to understand expectations and create a realistic plan for retail development. An open house will allow the residents to express their concerns.

A vision is very important for strategic direction:

**A sample vision statement** *"The vision for Downtown Edmonton is to have a diverse retail mix by supporting local, independent stores to add flavour and allowing national retailers to enhance the quality of living for our vibrant community."*

## THINK RESIDENTIAL

Successful retail needs a large residential population that is continually growing; where there is the revitalization and population growth, the retailers follow. This is key for retailers as they need a strong residential market. Usually, Startup & home-grown businesses move into low-cost locations, followed by the national retailers.

As residential development occurs, the retail scene will continue to improve. This is decisive for some of the store formats such as grocery stores and daily amenity items.

Around 11,660 residential units either proposed or under construction in the next five to ten years.

**New Supply Study:** Floor Area Ratio (FAR) is calculated by dividing the total Gross Floor Area (GFA) of all buildings on a lot by the area of that lot.[81]

According to a study by Altus Group it is estimated that greater than 400,000 square feet of land has been purchased or is pending sale within the downtown core (including some parts of Oliver).

Currently a FAR of 6.0 is used as average, the total buildable area would be 2.4 million square feet. Based on the average unit size for new projects, that represents about 3,400 units [~700 sq. ft] or 2,400 [~1,000 sq. ft]. Also, in recent years the FAR used is greater than 6, this could translate to around 4,000 units [~700 sq. ft and 7 FAR]

**RESIDENTIAL PROJECTS IN DOWNTOWN**

| No. | Project | Status | Approximate Units to be added |
|---|---|---|---|
| 1 | SKY Residences at ICE District | Under construction | 481 |
| 2 | The Legends Private Residences- JW Marriott Hotel | Under construction | 261 |
| 3 | Future Residences (Tower B) - | Under construction | 550 |
| 4 | Augustana | Under construction | 240 |
| 5 | ENCORE Tower | Under construction | 179 |
| 6 | Symphony Tower | Under Construction | 143 |
| 7 | Jasper House Condominiums On The Park | On hold | 240 |
| 8 | Great Gulf 100St. | Proposed | 450 |
| 9 | North | Proposed | 350 |
| 10 | Sedona 1 and 2 | Proposed | 106 |
| 11 | Jasper and 108 Street | Proposed | 1100 |
| 12 | Quarters – Corners Site | Under Construction | 200 |
| 13 | Healy Towers | Proposed | 1300 |
| 14 | ICE District Phase 2 | Proposed | 3000 |
| 15 | Alldritt Tower | Proposed | 800 |
| 16 | Westrich Pacific 106 St | Proposed | 600-700 |
| 17 | Edgar Developments 106 St | Proposed | 600-700 |
| 18 | Arlington | Rumoured | 300 |
| 19 | Regency BMO | Rumoured | N/A |
| 20 | Artist Quarters | Proposed | 60 |
| 21 | Wexford 104 St | Rumoured | N/A |
| 22 | Procura 109 St | Rumoured | N/A |
| 23 | Falcon Towers 104 St | Proposed | 700 |

**Total : 11,660**

**What we Heard:** In the last question when asked about suggestions to improve shopping in Downtown in one sentence.

*Encourage locally owned boutiques etc. to be in central core without exorbitant lease rates!!!!*

*Add more lighting and have the hours of operation of the coffee shops should be longer to make it and enticing place to spend your evenings.*

*Need stores that are well known and popular like Zara, H & M Sephora, and even novelty shops that create a unique experience for the customer. Downtown should have a more upscale feel to shopping than it does now. Only luxury is Holt Renfrew. Mall needs to create a better incentive and environment for more top retailers to come Downtown.*

*More family friendly shops and restaurants*

*Improve walkability, bikability, and attractiveness of the streets so I want to spend time around many parts of downtown.*

*Find a way to put businesses into the many vacant storefronts (esp along Jasper Ave), it makes the downtown look empty, rundown, and like there's nothing here.*

*Unique offerings that you can't find elsewhere might be good. More reasons to keep business downtown after hours might help generate business.*

*More selection...basically have the Bay, Winners.*

*Simon's would be an awesome addition to downtown*

*Make rent/lease rates more reasonable for small business, e.g. 104th St.*

*A grocery store in the core and a home improvement store that sells things like light bulbs, screws, etc.*

*Consider creating a gourmet market hall food experience like they have in Rotterdam to attract foodies. More home decor shops like West Elm and Pottery Barn on street level would attract me.*

*Encouraging a non-driving mindset between numerous downtown destinations*

*Please concentrate on unique, carefully curated shops with qualified, specialized staff to bring shoppers to downtown.*

*There really isn't much shopping available right now. we are the opposite of almost every other major city in the world. we have to leave to the west end or south side to shop. such limited selection downtown its almost a waste of time looking*

*I think a lot of low hanging fruit opportunities to enhance the downtown shopping experience, and downtown in general, would be beautification projects: adding more planters, trees, flowers, cleaning dirty sidewalks, making storefronts more visible, patios, etc. The area around City Centre Mall needs the most attention; it's quite barren and gross.*

*Needs complete activated street walls and shopping streets. Disconnected nodes and streets will have people driving instead of walking and going elsewhere to shop. Downtown is usually dusty, dirty, empty, and poorly lit at night.*

*More store selection and less harassment/cat-calling (etc.) outside of store entrances*

*Unique offerings that you can't find elsewhere might be good. More reasons to keep business downtown after hours might help generate business.*

*Feature shop of the week allowing for various retailers to be known with some engaging blog from a patron perspective or kids perspective*

*More selection that is different from what is available in malls.*

*More shops with on street entrances. Permanent market building...why not in pedestal of high rise condo?*

*Highlight the parking and pedway systems on tv and or radio to invite people downtown*

*Good lighting and lots of cameras outside might make it feel more safe. Businesses or restaurants that are open late!*

*With malls in every neighbourhood there needs to be something unique and affordable to bring people back downtown.*

*Facelift needed and renovations; no one likes shopping in areas that feel run down when the downtown is meant to represent heritage and modern lifestyle coming together.*

*Make downtown an interesting place to be - like SoHo, in NYC...Small, interesting shops that have exciting window displays and even better product. Shopping downtown* *should feel as easy as shopping on Whyte, but more urban, trendy, and modern.*

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*More stores for all sizes and genders. More special shops not found elsewhere.*

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*More active street frontages with mix of retail, restaurant*

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*A mix of chain and independent stores with different price points would be good. There are good dining options now we need shopping!*

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*It is all about options - there are not enough attractive shopping options for me - young, male, well-to-do, urban professional. I can think of one store - the Helm. That's not going to cut it*

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*More friendly workers in stores greeting customers. with more knowledge of good products.prices.. Restaurants are ones who need this especially. ...*

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*Jasper Avenue and the general area needs a facelift in the worst way; this would help attract residents and visitors staying in all the nearby hotels to mingle and shop.*

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*It's downtown for God's sake, their is hardly a thing that "down town people would want or wear, it seems like being in a very large clearance centre, it's actually embarrassing compared to other cities like Calgary, Vancouver, Toronto, Montreal, Ottawa, etc.*

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*Free parking*

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*Knowing what stores are available and having clusters help in terms of travelling. Its a hassle to move from one area to the other by vehicle or transit. One stop shopping would help.*

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*Open up the shops to the streets. It feels like a total desert for several blocks. There are lots of places I'd stop In casually and make a purchase but they all feel like they're locked away. More life on the streets makes me want to stay awhile and spend some money. Greatest example being the farmers market where I spend $60 a week just wandering the sips on the street.*

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*Lower commercial property taxes for accessibility to small businesses opening up. Streets need more walkability.*

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*More clothes stores*

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*Bring in a full-service grocery store (opening/ expanding Shoppers Drug Marts does not cut it).*

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*More choices please, do not make people shop in suburban power centres.*

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*More selection and availability of products/ services to attract the desired demographic*

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*Need better stores that rival wem and southgate*

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*More stores and more walkability*

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*Attract new business that people downtown will actually want to shop at. Youngers millenial type stores or unique local stores.*

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*Need a Grocery store in the core to replace the Sobeys that was taken out on 104 street. One in the mall would be excellent. Also, better stores for City Centre Mall to model after Southgate and Kingsway would make it a more attractive shopping destination.*

---

*More fun, interesting shops like on White Ave*

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*A mix of chain and independent stores with different price points would be good. There are good dining options now we need shopping!*

---

*Vary the focus and include a broad range of age groups with fewer chain stores and more variety.*

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*Make downtown more vibrant and shoppings should be family safe .... longer than 5pm.*

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*Lower the rent for small and unique business to afford to come downtown and make it more inviting for families to come and spend the day there not just 25 minutes. Thank you.*

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*it is very difficult for seniors and handicapped to park and navigate in the downtown area we can go to malls with free parking and same stores are available*

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*Places such as Commerce Place, Manual Life as well as shops on Rice Howard Way are not being highlighted as unique high end retailers. You can pass right by Commerce Place and never realize what is offered inside. It needs more than posters in windows.*

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*It is essential to have trained retail employees that engage customers and are familiar with the downtown shopping experience so they are equipped to recommend / cross promote to other businesses.*

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*Knowing I'll find a reasonably close parking spot, within safe walking distance.*

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*We need more retail on the street, at sidewalk level, to differentiate downtown from malls in suburbs.*

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# THE FUTURE OF RETAIL

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