# Appendix B - Detailed Technical Report

October 2, 2014

# Stage 1 Background Research Report
# Abbotsford OCP Update

Abbotsford, B.C.

| PREPARED BY: | PREPARED FOR: |
|---|---|
| Colliers International Consulting | City of Abbotsford |

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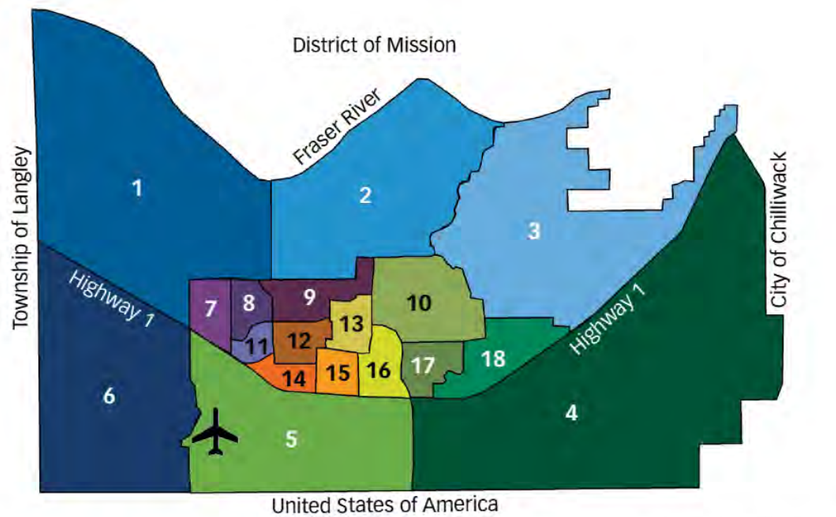
# Demographic Analysis and Forecast

## Community Areas

The City of Abbotsford has defined 18 community boundaries for use in tracking growth, change and activity. Colliers International Consulting (CIC) has run both demographic analyses and retail demand modeling based on these community boundaries, using PCensus software and both Census and demographic estimate data compiled by Environics Analytics for use in PCensus.




1. Bradner - Mt. Lehman
2. Matsqui Prairie
3. Sumas Mountain
4. Sumas Prairie
5. South Poplar
6. Aberdeen
7. West Townline
8. East Townline
9. Fairfield
10. Old Clayburn
11. West Clearbrook
12. Clearbrook Centre
13. Babich
14. South Clearbrook
15. Mill Lake
16. Abbotsford Centre
17. McMillan
18. Whatcom



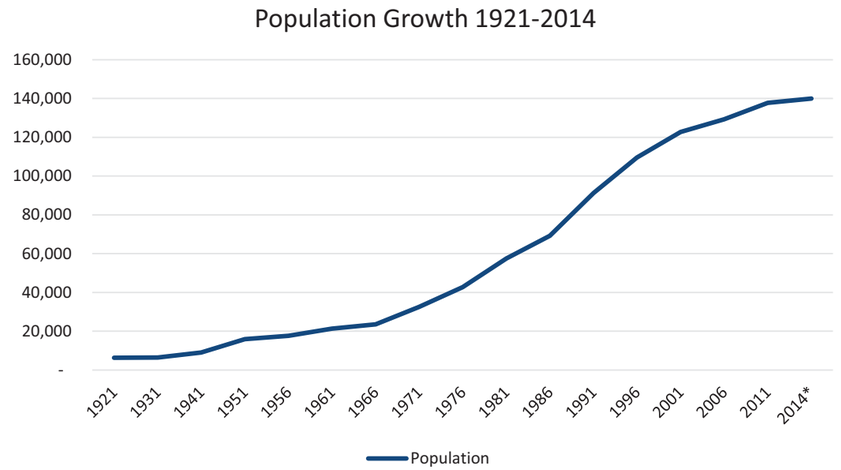
## Population Growth

CIC has examined historical population growth by community, based on adjusted Census population numbers and 2014 data estimates, and has projected population to a point at which the City of Abbotsford is expected to reach a total population of 200,000 residents. These population figures are presented in the table below.

| Neighbourhood/Area | 2006 adjusted | 2011 adjusted | 2014 estimate | Average Annual Population Growth |
|---|---|---|---|---|
| Bradner-Mt. Lehman | 3955 | 3910 | 3950 | -1 |
| Matsqui Prairie | 2156 | 2089 | 2130 | -3 |
| Sumas Mountain | 2395 | 3913 | 4250 | 232 |
| Sumas Prairie | 3358 | 3409 | 3460 | 13 |
| South Poplar | 7010 | 7927 | 8080 | 134 |
| Aberdeen | 5006 | 6203 | 6305 | 162 |
| West Townline | 8744 | 10159 | 10410 | 208 |
| East Townline | 11349 | 11449 | 11465 | 15 |
| Fairfield | 8954 | 8995 | 9075 | 15 |
| Old Clayburn | 15595 | 16868 | 17325 | 216 |
| West Clearbrook | 5854 | 5936 | 6010 | 20 |
| Clearbrook Centre | 12641 | 12738 | 12750 | 14 |
| Babich | 4986 | 5103 | 5230 | 31 |
| South Clearbrook | 7823 | 7738 | 7800 | -3 |
| Mill Lake | 7861 | 8728 | 8750 | 111 |
| Abbotsford Centre | 8213 | 8622 | 8710 | 62 |
| McMillan | 7817 | 7939 | 8040 | 28 |
| Whatcom | 5633 | 6104 | 6260 | 78 |
| Abbotsford Total | 129350 | 137830 | 140000 | 1331 |

## Historical Population Trend

Historic growth in the City of Abbotsford has been steady. The graph below shows City-wide population from 1921 to 2014.




*2014 estimate



## Population Projections

CIC has examined historical population growth by community, based on Census population growth and generalized estimates of future land uses in the current Official Community Plan, and has projected population by community to a point at which the City of Abbotsford is expected to reach a total population of 200,000 residents:

**City of Abbotsford**
**Forecast Community Population Growth Based on Trend***

| | Adjusted Census | | | Current Estimate | Forecast | |
|---|---|---|---|---|---|---|
| Neighbourhood/Area | 2006 | 2011 | Average Annual Growth Rate (2006-11) | 2014 | City Population of 200,000** | Increase From 2014 |
| Abbotsford Centre | 8,213 | 8,622 | 0.98% | 8,710 | 15,200 | 6,490 |
| Aberdeen | 5,006 | 6,203 | 4.38% | 6,305 | 7,900 | 1,595 |
| Babich | 4,986 | 5,103 | 0.46% | 5,230 | 8,000 | 2,770 |
| Bradner-Mt. Lehman | 3,955 | 3,910 | -0.23% | 3,950 | 4,100 | 150 |
| Clearbrook Centre | 12,641 | 12,738 | 0.15% | 12,750 | 23,200 | 10,450 |
| East Townline | 11,349 | 11,449 | 0.18% | 11,465 | 12,100 | 635 |
| Fairfield | 8,954 | 8,995 | 0.09% | 9,075 | 9,700 | 625 |
| Matsqui Prairie | 2,156 | 2,089 | -0.63% | 2,130 | 2,200 | 70 |
| McMillan | 7,817 | 7,939 | 0.31% | 8,040 | 10,900 | 2,860 |
| Mill Lake | 7,861 | 8,728 | 2.11% | 8,750 | 16,200 | 7,450 |
| Old Clayburn | 15,595 | 16,868 | 1.58% | 17,325 | 22,500 | 5,175 |
| South Clearbrook | 7,823 | 7,738 | -0.22% | 7,800 | 10,100 | 2,300 |
| South Poplar | 7,010 | 7,927 | 2.49% | 8,080 | 13,000 | 4,920 |
| Sumas Mountain | 2,395 | 3,913 | 10.32% | 4,250 | 13,600 | 9,350 |
| Sumas Prairie | 3,358 | 3,409 | 0.30% | 3,460 | 3,500 | 40 |
| West Clearbrook | 5,854 | 5,936 | 0.28% | 6,010 | 7,000 | 990 |
| West Townline | 8,744 | 10,159 | 3.05% | 10,410 | 12,800 | 2,390 |
| Whatcom | 5,633 | 6,104 | 1.62% | 6,260 | 8,000 | 1,740 |
| **City of Abbotsford Total** | **129,350** | **137,830** | **1.28%** | **140,000** | **200,000** | |

Source: BC Stats undercount estimates
* To be adjusted following a review of development capacity by community.
** Expected to be reached by 2035 in a medium growth scenario of 1.7% per year.

Based on BC Stats growth trends, CIC would expect the City of Abbotsford to reach a total population of 200,000 residents by the year 2035. This reflects average annual growth of roughly 1.7%.

At a lower assumed growth rate of 1.0% per year, this population threshold would not be reached for 35 years or 2049, while at a higher assumed growth rate of 2.3% per year, a population threshold of 200,00 would be reached within 15 years, or by 2029.

## Community Age Profiles (2014-2035)

Colliers has projected the age profile for each community to a point at which the City of Abbotsford's total population is expected to reach 200,000 residents in order to prcvide a clearer understanding of how each of Abbotsford's communities is expected to evolve based on historical trends. Age profiles by each community are available in Appendix A.

| | 2011 census* | 2035 projection |
|---|---|---|
| 0 to 4 years | 8,595 | 11,313 |
| 5 to 19 years | 26,280 | 31,700 |
| 20 to 24 years | 9,235 | 14,554 |
| 25 to 34 years | 17,990 | 29,017 |
| 35 to 44 years | 17,635 | 24,189 |
| 45 to 54 years | 18,655 | 24,546 |
| 55 to 64 years | 15,645 | 24,272 |
| 65 to 74 years | 10,205 | 19,279 |
| 75 years and over | 9,590 | 21,130 |
| **Total Population** | **133,730** | **200,000** |

**2011 census data was used, without adjustment. Therefore, total population is 133,730 instead of 137,830 as adjusted by BC Stats Data for adjusted age profiles are not available at this time.*



# Demographic Comparison

The following section highlights key demographic changes in the City of Abbotsford from 2001 to 2006 to 2011. Comparisons to neighbouring municipalities of Delta, Surrey, Langley City and Langley Township, and the Metro Vancouver region are also included. Census data from 2001, 2006 and 2011 have been used.

## Community by Change in Median Age

Median age in Abbotsford increased from 35 years old in 2001 to 36.7 years old in 2006 to 37.8 years old in 2011. Median age in individual communities range from 48.1 years old to 32.7 years old.

The table below lists communities from oldest median age to youngest median age in 2011.

| | 2001 | 2006 | 2011 | Change from 2006 to 2011 |
|---|---|---|---|---|
| Mill Lake | 42.3 | 46.4 | 48.1 | 1.7 |
| Clearbrook Centre | 46.7 | 47.3 | 47.8 | 0.5 |
| Whatcom | 38.0 | 40.1 | 41.5 | 1.4 |
| Bradner-Mt.Lehman | 36.3 | 39.3 | 40.9 | 1.6 |
| West Clearbrook | 39.1 | 41.7 | 40.2 | -1.5 |
| McMillan | 34.6 | 36.7 | 39.1 | 2.4 |
| Babich | 36.5 | 37.9 | 38.9 | 1.0 |
| **Abbotsford Total** | **35.1** | **36.7** | **37.8** | **1.1** |
| South Poplar | 34.4 | 36.4 | 37.7 | 1.3 |
| Aberdeen | 36.8 | 37.0 | 37.5 | 0.5 |
| Fairfield | 33.9 | 36.4 | 37.5 | 1.1 |
| South Clearbrook | 31.4 | 33.3 | 37.1 | 3.8 |
| Old Clayburn | 31.8 | 34.9 | 35.8 | 0.9 |
| Sumas Mountain | 34.3 | 32.9 | 35.1 | 2.2 |
| Abbotsford Centre | 35.0 | 36.1 | 34.8 | -1.3 |
| Sumas Prairie | 32.3 | 32.6 | 34.2 | 1.6 |
| East Townline | 30.3 | 32.0 | 33.9 | 1.9 |
| Matsqui Prairie | 29.4 | 32.7 | 33.5 | 0.8 |
| West Townline | 29.9 | 31.0 | 32.7 | 1.7 |
| | | | | |
| **Delta** | 38.1 | 40.4 | 41.8 | 1.4 |
| **Surrey** | 35.5 | 36.5 | 36.8 | 0.3 |
| **Langley City** | 36.5 | 38.7 | 39.1 | 0.4 |
| **Langley Township** | 37.2 | 38.6 | 39.3 | 0.7 |
| **Metro Vancouver** | 37.4 | 38.5 | 39.3 | 0.8 |

## Community by Average Household Income

The average household income in the City of Abbotsford increased by $25,268 from 2001-2011. Within individual communities, average household incomes range from $52,983 in Clearbrook to $125,708 in Bradner-Mt. Lehman in 2011.

The table below lists communities by highest to lowest average household income in 2011.

| | 2001 | 2006 | 2011 |
|---|---|---|---|
| Bradner-Mt.Lehman | $73,518 | $104,095 | $125,708 |
| Sumas Mountain | $70,819 | $96,408 | $115,656 |
| McMillan | $73,319 | $86,730 | $104,174 |
| Whatcom | $78,809 | $85,549 | $103,039 |
| Old Clayburn | $71,184 | $85,114 | $102,720 |
| Aberdeen | $65,974 | $83,637 | $101,547 |
| Matsqui Prairie | $64,318 | $80,428 | $96,637 |
| Sumas Prairie | $61,035 | $76,313 | $93,288 |
| South Poplar | $54,176 | $72,429 | $89,088 |
| Fairfield | $65,368 | $73,102 | $88,769 |
| West Townline | $66,891 | $71,867 | $86,904 |
| East Townline | $63,850 | $69,591 | $86,348 |
| **Abbotsford Total** | **$56,194** | **$66,309** | **$81,462** |
| South Clearbrook | $50,811 | $55,501 | $67,365 |
| West Clearbrook | $45,729 | $52,676 | $65,685 |
| Abbotsford Centre | $46,893 | $53,508 | $65,384 |
| Mill Lake | $37,684 | $44,188 | $55,474 |
| Babich | $41,902 | $45,132 | $55,141 |
| Clearbrook Centre | $39,966 | $42,692 | $52,983 |
| | | | |
| Delta | $74,936 | $89,325 | $100,903 |
| Surrey | $63,197 | $78,602 | $91,939 |
| Langley City | $51,030 | $59,749 | $68,478 |
| Langley Township | $70,481 | $88,977 | $103,103 |
| Metro Vancouver | $63,003 | $77,979 | $89,693 |



## Community by Average Persons per Household

The average number of persons per household has remained constant at 2.8 from 2001 to 2011. In 2011, Clearbrook Centre had the smallest average households at 2.0 persons, while West Townline had the largest average households at 3.7 persons.

The table below lists communities by average persons per household in 2011.

| | 2001 | 2006 | 2011 |
|---|---|---|---|
| Clearbrook Centre | 2.1 | 2.1 | 2.0 |
| Babich | 2.2 | 2.1 | 2.1 |
| Mill Lake | 2.1 | 2.1 | 2.1 |
| Abbotsford Centre | 2.4 | 2.4 | 2.3 |
| West Clearbrook | 2.6 | 2.5 | 2.5 |
| Whatcom | 2.8 | 2.7 | 2.7 |
| **Abbotsford Total** | **2.8** | **2.8** | **2.8** |
| South Poplar | 2.8 | 2.7 | 2.8 |
| South Clearbrook | 3.1 | 2.9 | 2.9 |
| McMillan | 3.1 | 3.0 | 2.9 |
| Old Clayburn | 3.2 | 3.1 | 3.0 |
| Aberdeen | 3.2 | 3.1 | 3.1 |
| Bradner-Mt.Lehman | 3.2 | 3.1 | 3.1 |
| Fairfield | 3.4 | 3.3 | 3.2 |
| Sumas Mountain | 3.2 | 3.3 | 3.3 |
| Sumas Prairie | 3.3 | 3.3 | 3.3 |
| Matsqui Prairie | 3.6 | 3.4 | 3.3 |
| East Townline | 3.7 | 3.7 | 3.7 |
| West Townline | 3.8 | 3.8 | 3.7 |
| | | | |
| Delta | 2.9 | 2.9 | 2.8 |
| Surrey | 3.0 | 3.0 | 3.0 |
| Langley City | 2.3 | 2.2 | 2.2 |
| Langley Township | 2.9 | 2.8 | 2.8 |
| Metro Vancouver | 2.6 | 2.6 | 2.5 |

## Community by Home Ownership Rate

The home ownership rate in the City of Abbotsford has risen from 70% in 2001 to 72% in 2011. Amongst the various communities, home ownership in 2011 today ranged from 91% in McMillan to 46% in Mill Lake.

The table below lists communities by largest percentage of home ownership in 2011.

| | 2001 | 2006 | 2011 |
|---|---|---|---|
| McMillan | 89% | 90% | 91% |
| Sumas Mountain | 81% | 88% | 88% |
| Old Clayburn | 87% | 89% | 88% |
| Whatcom | 87% | 86% | 86% |
| Fairfield | 80% | 85% | 85% |
| Bradner-Mt.Lehman | 86% | 82% | 83% |
| West Townline | 75% | 79% | 78% |
| East Townline | 66% | 76% | 76% |
| Aberdeen | 74% | 75% | 75% |
| Matsqui Prairie | 72% | 72% | 73% |
| South Poplar | 66% | 74% | 73% |
| **Abbotsford Total** | **70%** | **73%** | **72%** |
| West Clearbrook | 74% | 69% | 69% |
| Clearbrook Centre | 66% | 69% | 69% |
| Sumas Prairie | 70% | 68% | 68% |
| South Clearbrook | 63% | 62% | 61% |
| Abbotsford Centre | 56% | 58% | 58% |
| Babich | 54% | 53% | 51% |
| Mill Lake | 45% | 48% | 46% |
| | | | |
| **Delta** | 79% | 81% | 81% |
| **Surrey** | 71% | 75% | 76% |
| **Langley City** | 58% | 61% | 60% |
| **Langley Township** | 84% | 86% | 86% |
| **Metro Vancouver** | 61% | 65% | 66% |



## Community by Immigrant Status

27% of Abbotsford residents are immigrants. The highest concentration of immigrants is in the area made up of East Townline, West Townline and Fairfield.

The table below lists communities by highest percentage of immigrants in 2011.

| | 2001 | 2006 | 2011 |
|---|---|---|---|
| East Townline | 46% | 53% | 53% |
| West Townline | 38% | 42% | 45% |
| Fairfield | 33% | 34% | 37% |
| South Poplar | 21% | 28% | 34% |
| Clearbrook Centre | 22% | 30% | 32% |
| West Clearbrook | 29% | 29% | 29% |
| **Abbotsford Total** | **24%** | **26%** | **27%** |
| Matsqui Prairie | 15% | 22% | 27% |
| South Clearbrook | 29% | 27% | 24% |
| Sumas Mountain | 15% | 18% | 24% |
| Babich | 18% | 21% | 21% |
| Mill Lake | 21% | 22% | 21% |
| Aberdeen | 21% | 22% | 20% |
| Bradner-Mt.Lehman | 18% | 19% | 19% |
| McMillan | 16% | 17% | 19% |
| Whatcom | 19% | 19% | 17% |
| Sumas Prairie | 18% | 15% | 17% |
| Old Clayburn | 16% | 14% | 14% |
| Abbotsford Centre | 12% | 13% | 13% |
| | | | |
| **Delta** | 27% | 28% | 30% |
| **Surrey** | 33% | 38% | 40% |
| **Langley City** | 16% | 18% | 19% |
| **Langley Township** | 15% | 17% | 17% |
| **Metro Vancouver** | 38% | 40% | 41% |

# Housing Analysis and Forecast

## Housing Activity by Type

Using 2014 first and second quarter geocoded development application data from the City of Abbotsford & shopping centres, CIC mapped out residential development activity by community. The table below shows development applications by type for Q1 2014 and Q2 2014. Detailed maps of development applications in each community can be found in Appendix B.

| Q1 2014 | Bradner-Mt.Lehman | Matsqui Prairie | Sumas Mountain | Sumas Prairie | South Poplar | Aberdeen | West Townline | East Townline | Fairfield | Old Clayburn | West Clearbrook | Clearbrook Centre | Babich | South Clearbrook | Mill Lake | Abbotsford Centre | McMillan | Whatcom | **Abbotsford Total** |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Number of Applications | 0 | 0 | 103 | 0 | 186 | 316 | 63 | 1 | 0 | 153 | 2 | 177 | 1 | 3 | 61 | 2 | 117 | 186 | 1371 |
| Percentage of Applications | 0% | 0% | 8% | 0% | 14% | 23% | 5% | 0% | 0% | 11% | 0% | 13% | 0% | 0% | 4% | 0% | 9% | 14% | 100% |
| Apartments Under Review (units) | | | | | 172 | 44 | | | | | | 2 | | | | | 85 | | **303** |
| Apartments Approved (units) | | | | | | | | | | | | 161 | | | 60 | | | 44 | **265** |
| Single Family Under Review (lots) | | | | | 12 | 41 | 63 | | | 74 | 1 | 1 | 1 | | | 1 | 1 | 30 | **225** |
| Single Family Application in Progress (lots) | | | 103 | | 2 | 116 | | 1 | | 19 | 1 | | | 3 | 1 | 1 | 1 | 1 | **249** |
| Townhomes Under Revision (units) | | | | | | 115 | | | | | | 13 | | | | | | 111 | **239** |
| Townhomes Approved (units) | | | | | | | | | | 60 | | | | | | | 30 | | **90** |



| Q2 2014 | Bradner-Mt.Lehman | Matsqui Prairie | Sumas Mountain | Sumas Prairie | South Poplar | Aberdeen | West Townline | East Townline | Fairfield | Old Clayburn | West Clearbrook | Clearbrook Centre | Babich | South Clearbrook | Mill Lake | Abbotsford Centre | McMillan | Whatcom | **Abbotsford Total** |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Number of Applications | 0 | 1 | 109 | 0 | 182 | 317 | 63 | 1 | 0 | 152 | 2 | 140 | 1 | 1 | 107 | 2 | 117 | 204 | 1399 |
| Percentage of Applications | 0% | 0% | 8% | 0% | 13% | 23% | 5% | 0% | 0% | 11% | 0% | 10% | 0% | 0% | 8% | 0% | 8% | 15% | 100% |
| Apartments Under Review (units) | | | | | 172 | 44 | | | | | | | | | | | 85 | | **301** |
| Apartments Approved (units) | | | | | | | | | | | | 126 | | | 60 | | | 44 | **230** |
| Single Family Under Review (lots) | | 1 | 41 | | 9 | 17 | 2 | | | 4 | 1 | 1 | 1 | | | 1 | 1 | | **79** |
| Single Family Application in Progress (lots) | | | 68 | | 1 | 141 | 61 | 1 | | 88 | 1 | | | 1 | 1 | 1 | 1 | 31 | **396** |
| Townhomes Under Revision (units) | | | | | | 115 | | | | | | | | | 46 | | | 129 | **290** |
| Townhomes Approved (units) | | | | | | | | | | 60 | | 13 | | | | | 30 | | **103** |

*Source: Q1 and Q2 2014 geocoded development application data. City of Abbotsford. Pitney Bowes 2013.*

## Development Capacity

In order for CIC to assist in more definitively determining realistic projections of housing unit demand, by type, on a community by community basis, it will be necessary for the City of Abbotsford to better define future development capacity for each of the city's 18 communities. This will entail not only a compilation of available residential land by zoning type and by community (GIS), but also the determination of more definitive parameters (minimum and maximum density) around achievable development densities.

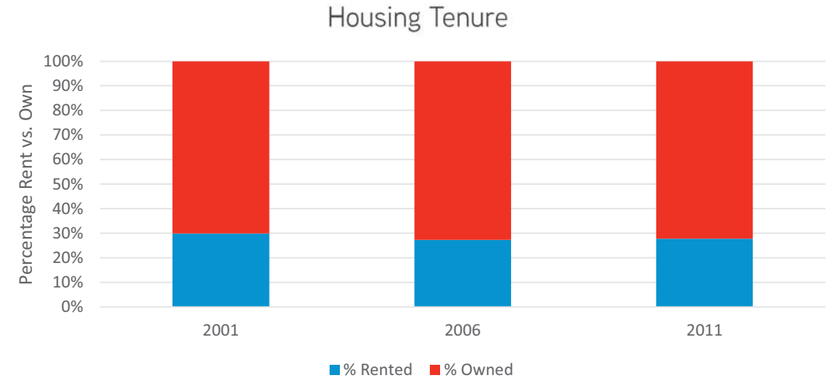
Once residential development capacity is better understood on a community by community basis, CIC can then more effectively make community-driven housing type demand projections based on realistic trends in population growth, age profile, and household maintainer rates. CIC will provide input to City staff in support of this recommended evaluation of development capacity by community as part of the Stage 2 work program of this Abbotsford OCP Update.

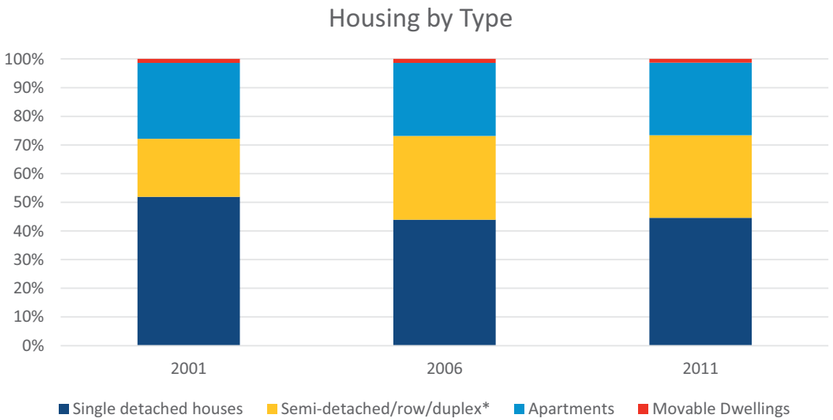
## Housing Mix by Community

The following section is a review of housing tenure, type and housing by period of construction in Abbotsford's 18 communities based on 2001, 2006 and 2011 census data.



City of Abbotsford




*includes single family homes with secondary suites

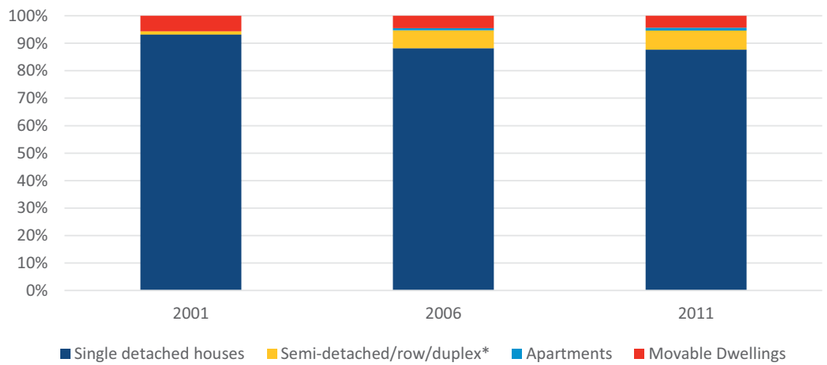
Housing by Period of Construction

| Construction Period | Number of Units | Percentage of Total Units |
|---|---|---|
| Before 1960 | 2,606 | 5% |
| **1961 to 1980** | **13,382** | **27%** |
| 1981 to 1990 | 12,329 | 25% |
| 1991 to 2000 | 11,801 | 24% |
| 2001 to 2005 | 4,010 | 8% |
| 2006 to 2011 | 4,130 | 8% |
| After 2011 | 1,758 | 4% |

## Bradner-Mount Lehman

### Housing Tenure

### Housing by Type




*includes single family homes with secondary suites

### Housing by Period of Construction

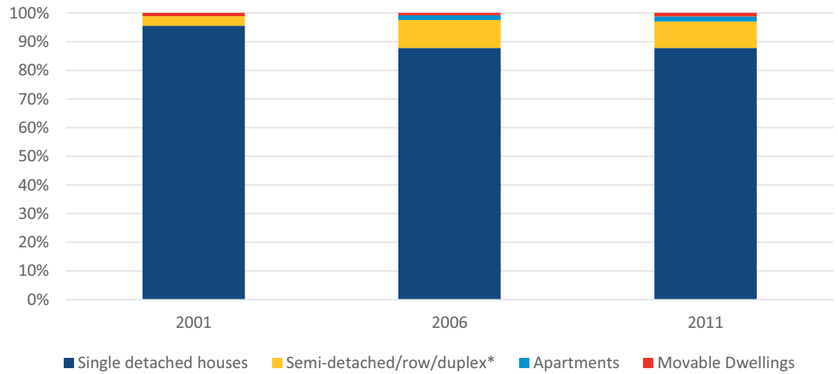
| Construction Period | Number of Units | Percentage of Total Units |
|---|---|---|
| Before 1960 | 232 | 16% |
| **1961 to 1980** | **524** | **37%** |
| 1981 to 1990 | 253 | 18% |
| 1991 to 2000 | 238 | 17% |
| 2001 to 2005 | 32 | 2% |
| 2006 to 2011 | 40 | 3% |
| After 2011 | 114 | 8% |



## Matsqui Prairie

### Housing Tenure

### Housing by Type




*includes single family homes with secondary suites

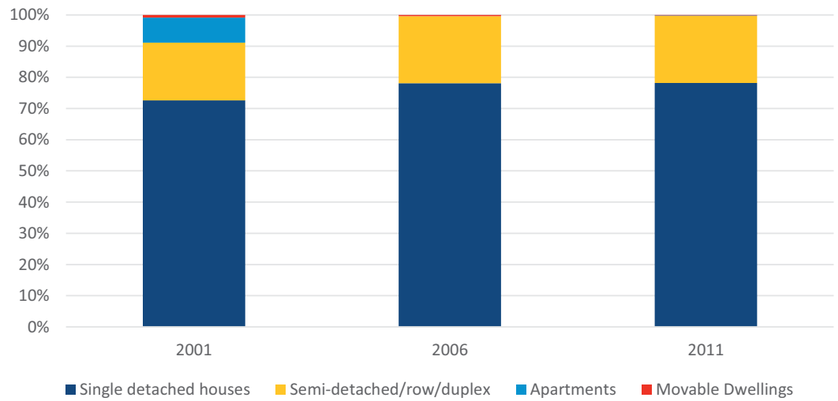
### Housing by Period of Construction

| Construction Period | Number of Units | Percentage of Total Units |
|---|---|---|
| **Before 1960** | **221** | **36%** |
| 1961 to 1980 | 135 | 22% |
| 1981 to 1990 | 74 | 12% |
| 1991 to 2000 | 151 | 24% |
| 2001 to 2005 | 19 | 3% |
| 2006 to 2011 | 12 | 2% |
| After 2011 | 5 | 1% |

## Sumas Mountain

### Housing Tenure

### Housing by Type




*includes single family homes with secondary suites

### Housing by Period of Construction

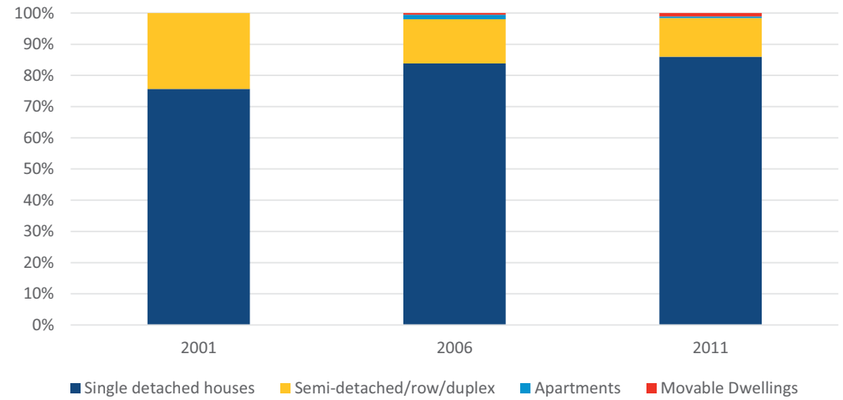
| Construction Period | Number of Units | Percentage of Total Units |
|---|---|---|
| Before 1960 | 58 | 4% |
| 1961 to 1980 | 34 | 3% |
| 1981 to 1990 | 51 | 4% |
| 1991 to 2000 | 319 | 24% |
| 2001 to 2005 | 247 | 18% |
| **2006 to 2011** | **533** | **40%** |
| After 2011 | 104 | 8% |



## Sumas Prairie

### Housing Tenure

### Housing by Type




*includes single family homes with secondary suites

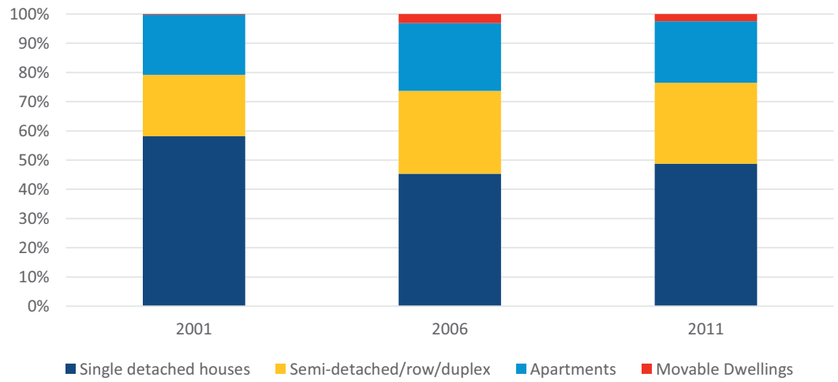
### Housing by Period of Construction

| Construction Period | Number of Units | Percentage of Total Units |
|---|---|---|
| Before 1960 | 240 | 21% |
| **1961 to 1980** | **272** | **24%** |
| 1981 to 1990 | 184 | 16% |
| 1991 to 2000 | 212 | 19% |
| 2001 to 2005 | 116 | 10% |
| 2006 to 2011 | 54 | 5% |
| After 2011 | 53 | 5% |

## South Poplar

### Housing Tenure

### Housing by Type




*includes single family homes with secondary suites

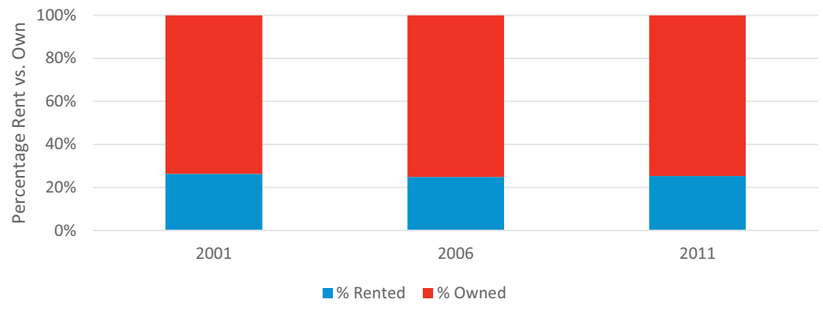
### Housing by Period of Construction

| Construction Period | Number of Units | Percentage of Total Units |
|---|---|---|
| Before 1960 | 327 | 11% |
| **1961 to 1980** | **919** | **31%** |
| 1981 to 1990 | 580 | 20% |
| 1991 to 2000 | 500 | 17% |
| 2001 to 2005 | 161 | 5% |
| 2006 to 2011 | 290 | 10% |
| After 2011 | 193 | 6% |

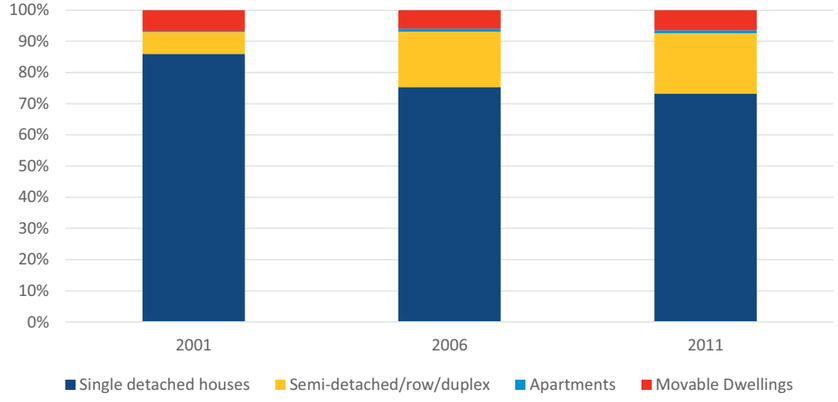


## Aberdeen

### Housing Tenure




### Housing by Type



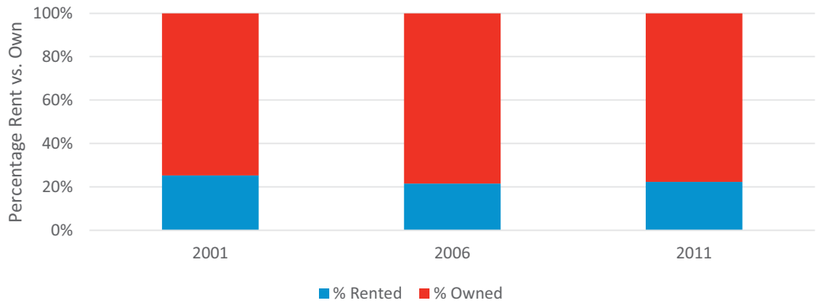

*includes single family homes with secondary suites

### Housing by Period of Construction

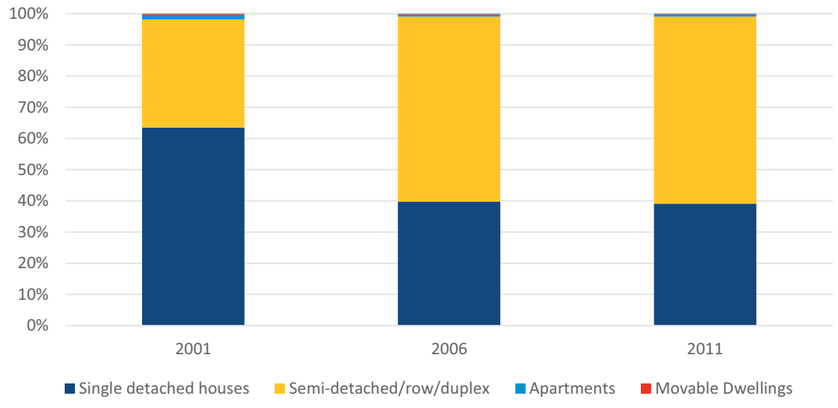
| Construction Period | Number of Units | Percentage of Total Units |
|---|---|---|
| Before 1960 | 228 | 12% |
| **1961 to 1980** | **606** | **31%** |
| 1981 to 1990 | 164 | 8% |
| 1991 to 2000 | 138 | 7% |
| 2001 to 2005 | 421 | 21% |
| 2006 to 2011 | 372 | 19% |
| After 2011 | 45 | 2% |

## West Townline

### Housing Tenure




### Housing by Type




*includes single family homes with secondary suites

### Housing by Period of Construction

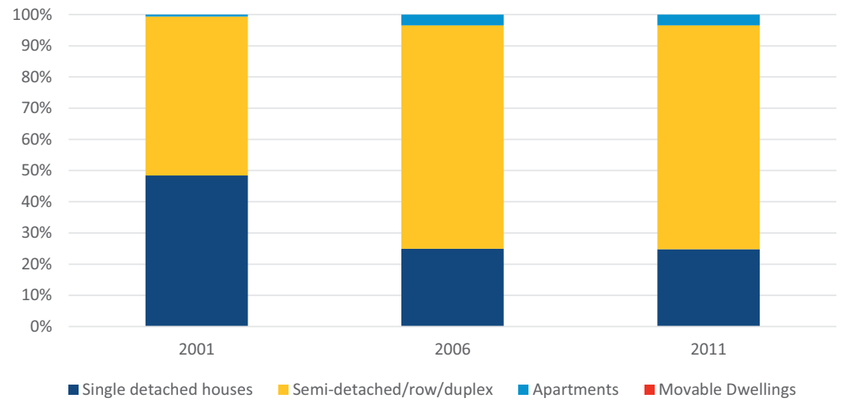
| Construction Period | Number of Units | Percentage of Total Units |
|---|---|---|
| Before 1960 | 7 | 0.2% |
| 1961 to 1980 | 124 | 4% |
| 1981 to 1990 | 603 | 21% |
| **1991 to 2000** | **1260** | **44%** |
| 2001 to 2005 | 388 | 14% |
| 2006 to 2011 | 390 | 14% |
| After 2011 | 87 | 3% |



## East Townline

### Housing Tenure

### Housing by Type




*includes single family homes with secondary suites

### Housing by Period of Construction

| Construction Period | Number of Units | Percentage of Total Units |
|---|---|---|
| Before 1960 | 3 | 0.1% |
| 1961 to 1980 | 183 | 5.7% |
| 1981 to 1990 | 558 | 17.3% |
| **1991 to 2000** | **1827** | **56.5%** |
| 2001 to 2005 | 543 | 16.8% |
| 2006 to 2011 | 81 | 2.5% |
| After 2011 | 36 | 1.1% |

## Fairfield

### Housing Tenure

### Housing by Type

*includes single family homes with secondary suites

### Housing by Period of Construction

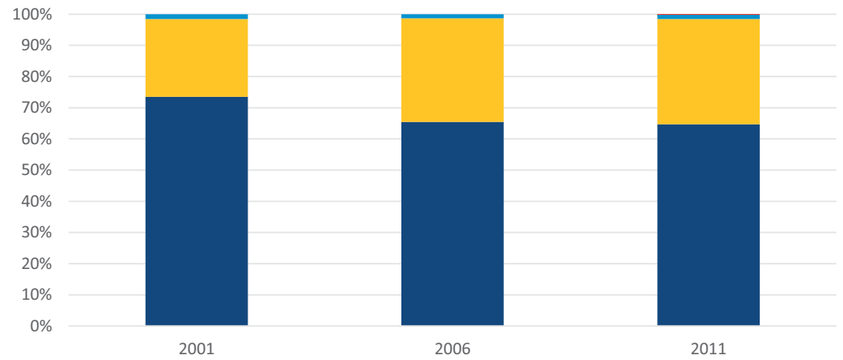
| Construction Period | Number of Units | Percentage of Total Units |
|---|---|---|
| Before 1960 | 2 | 0.1% |
| 1961 to 1980 | 401 | 14% |
| **1981 to 1990** | **1547** | **52%** |
| 1991 to 2000 | 640 | 22% |
| 2001 to 2005 | 142 | 5% |
| 2006 to 2011 | 67 | 2% |
| After 2011 | 152 | 5% |



## Old Clayburn

### Housing Tenure

### Housing by Type




*includes single family homes with secondary suites

### Housing by Period of Construction

| Construction Period | Number of Units | Percentage of Total Units |
|---|---|---|
| Before 1960 | 16 | 0.3% |
| 1961 to 1980 | 1131 | 20% |
| 1981 to 1990 | 1377 | 24% |
| **1991 to 2000** | **1565** | **27%** |
| 2001 to 2005 | 832 | 15% |
| 2006 to 2011 | 577 | 10% |
| After 2011 | 211 | 4% |

## West Clearbrook

### Housing Tenure

### Housing by Type

*includes single family homes with secondary suites

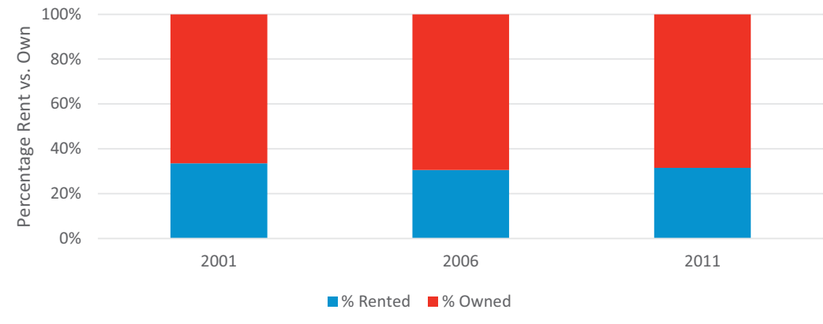
### Housing by Period of Construction

| Construction Period | Number of Units | Percentage of Total Units |
|---|---|---|
| Before 1960 | 53 | 3% |
| **1961 to 1980** | **1151** | **56%** |
| 1981 to 1990 | 503 | 25% |
| 1991 to 2000 | 245 | 12% |
| 2001 to 2005 | 8 | 0% |
| 2006 to 2011 | 19 | 1% |
| After 2011 | 66 | 3% |

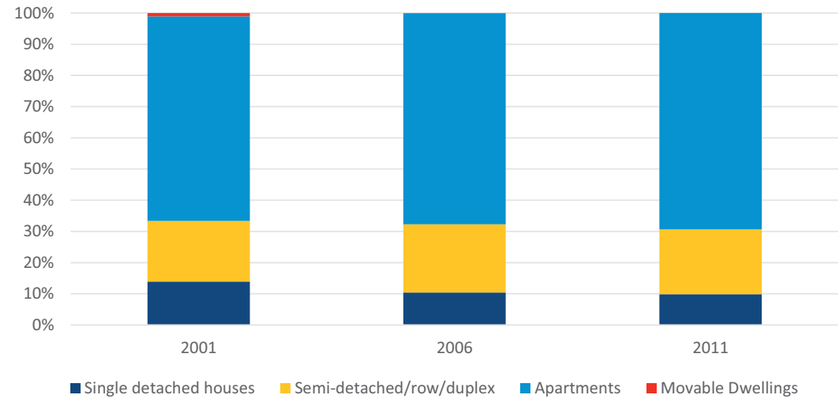


## Clearbrook Centre

### Housing Tenure




### Housing by Type



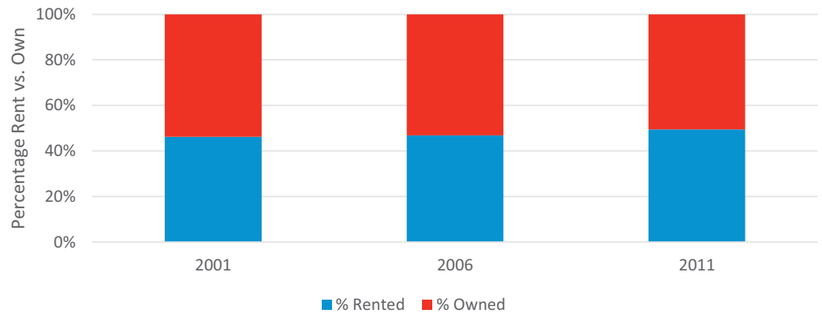

*includes single family homes with secondary suites

### Housing by Period of Construction

| Construction Period | Number of Units | Percentage of Total Units |
|---|---|---|
| Before 1960 | 95 | 2% |
| 1961 to 1980 | 1609 | 27% |
| **1981 to 1990** | **2320** | **39%** |
| 1991 to 2000 | 1379 | 23% |
| 2001 to 2005 | 152 | 3% |
| 2006 to 2011 | 296 | 5% |
| After 2011 | 124 | 2% |

## Babich

### Housing Tenure




### Housing by Type

*includes single family homes with secondary suites

### Housing by Period of Construction

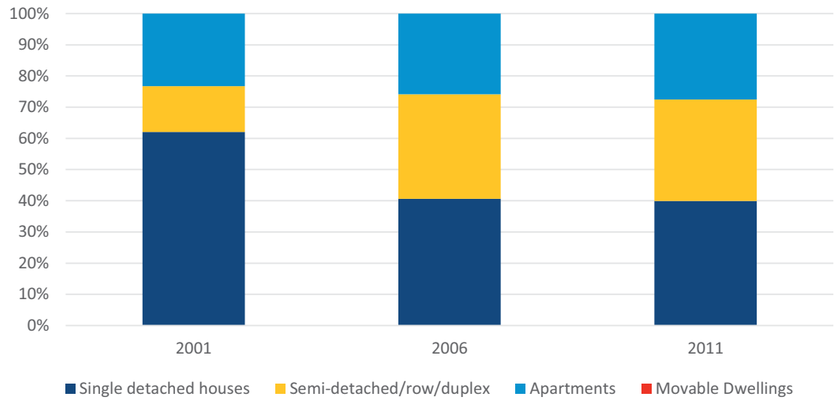
| Construction Period | Number of Units | Percentage of Total Units |
|---|---|---|
| Before 1960 | 128 | 5% |
| 1961 to 1980 | 706 | 28% |
| **1981 to 1990** | **785** | **31%** |
| 1991 to 2000 | 631 | 25% |
| 2001 to 2005 | 103 | 4% |
| 2006 to 2011 | 48 | 2% |
| After 2011 | 101 | 4% |



## South Clearbrook

### Housing Tenure

### Housing by Type




*includes single family homes with secondary suites

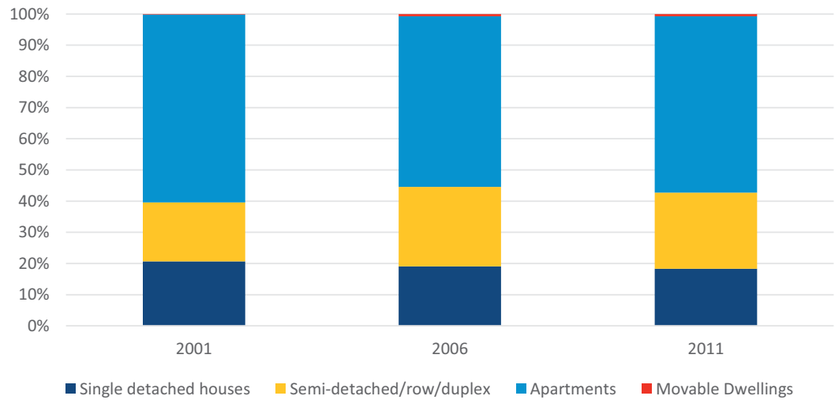
### Housing by Period of Construction

| Construction Period | Number of Units | Percentage of Total Units |
|---|---|---|
| Before 1960 | 172 | 6% |
| **1961 to 1980** | **1715** | **60%** |
| 1981 to 1990 | 493 | 17% |
| 1991 to 2000 | 302 | 11% |
| 2001 to 2005 | 27 | 1% |
| 2006 to 2011 | 52 | 2% |
| After 2011 | 79 | 3% |

## Mill Lake

### Housing Tenure

### Housing by Type




*includes single family homes with secondary suites

### Housing by Period of Construction

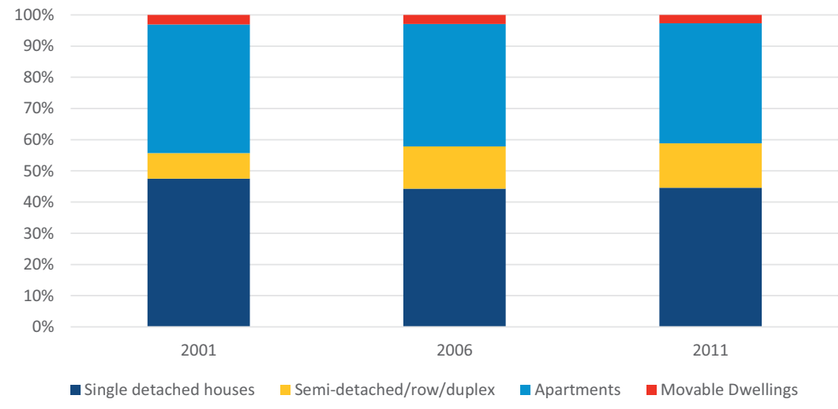
| Construction Period | Number of Units | Percentage of Total Units |
|---|---|---|
| Before 1960 | 161 | 5% |
| **1961 to 1980** | **1,232** | **35%** |
| 1981 to 1990 | 1,037 | 29% |
| 1991 to 2000 | 300 | 8% |
| 2001 to 2005 | 181 | 5% |
| 2006 to 2011 | 545 | 15% |
| After 2011 | 79 | 2% |



## Abbotsford Centre

### Housing Tenure

### Housing by Type




*includes single family homes with secondary suites

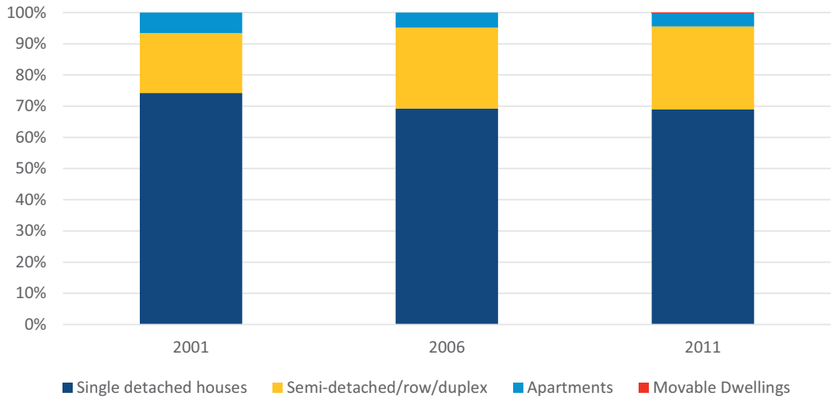
### Housing by Period of Construction

| Construction Period | Number of Units | Percentage of Total Units |
|---|---|---|
| Before 1960 | 635 | 17% |
| **1961 to 1980** | **1650** | **45%** |
| 1981 to 1990 | 462 | 13% |
| 1991 to 2000 | 411 | 11% |
| 2001 to 2005 | 85 | 2% |
| 2006 to 2011 | 314 | 9% |
| After 2011 | 75 | 2% |

## McMillan

### Housing Tenure

### Housing by Type




*includes single family homes with secondary suites

### Housing by Period of Construction

| Construction Period | Number of Units | Percentage of Total Units |
|---|---|---|
| Before 1960 | 27 | 1% |
| 1961 to 1980 | 827 | 29% |
| **1981 to 1990** | **842** | **30%** |
| 1991 to 2000 | 491 | 17% |
| 2001 to 2005 | 287 | 10% |
| 2006 to 2011 | 238 | 8% |
| After 2011 | 107 | 4% |



## Whatcom

### Housing Tenure

### Housing by Type

*includes single family homes with secondary suites

### Housing by Period of Construction

| Construction Period | Number of Units | Percentage of Total Units |
|---|---|---|
| Before 1960 | 1 | 0% |
| 1961 to 1980 | 163 | 7% |
| 1981 to 1990 | 496 | 20% |
| **1991 to 2000** | **1192** | **49%** |
| 2001 to 2005 | 266 | 11% |
| 2006 to 2011 | 202 | 8% |
| After 2011 | 127 | 5% |

# Employment Analysis and Forecast

## Labour Force Makeup

A review of the City of Abbotsford's current labour force makeup shows the majority of workers in the retail trade, construction, health care and manufacturing industries. For further reference, a detailed breakdown of the labour force by occupation and occupations by community is available in Appendix C.

| Industry | Abbotsford Total |
|---|---|
| 11 Agriculture, forestry, fishing and hunting | 5,285 |
| 21 Mining, quarrying, and oil and gas extraction | 220 |
| 22 Utilities | 205 |
| 23 Construction | 6,710 |
| 31-33 Manufacturing | 6,350 |
| 41 Wholesale trade | 2,900 |
| 44-45 Retail trade | 7,635 |
| 48-49 Transportation and warehousing | 4,720 |
| 51 Information and cultural industries | 920 |
| 52 Finance and insurance | 2,025 |
| 53 Real estate and rental and leasing | 1,380 |
| 54 Professional, scientific and technical services | 3,290 |
| 55 Management of companies and enterprises | 25 |
| 56 Administrative and support, waste management and remediation services | 2,890 |
| 61 Educational services | 4,790 |
| 62 Health care and social assistance | 6,565 |
| 71 Arts, entertainment and recreation | 1,015 |
| 72 Accommodation and food services | 4,525 |
| 81 Other services (except public administration) | 3,715 |
| 91 Public administration | 3,750 |
| Industry - not applicable | 1,615 |
| **2011 Labour Force 15 years and over** | **70,530** |

*Source: National Household Survey 2011*



## Net Inflow/Outflow of Workers

Based on the commuting flow data of the 2011 National Household Survey[1], the City of Abbotsford has a net outflow of workers of 1,005. This is minimal compared to the neighbouring communities of Surrey and Chilliwack, indicating a relatively balanced employment picture.

| | Residents Working Elsewhere | Residents of Other Areas Working Here | Net inflow/outflow of Workers |
|---|---|---|---|
| **Abbotsford** | 16,600 | 15,595 | -1,005 |
| **Surrey** | 94,735 | 47,035 | -47,700 |
| **Langley** | 34,360 | 36,845 | 2,485 |
| **Chilliwack** | 9,055 | 4,570 | -4,485 |

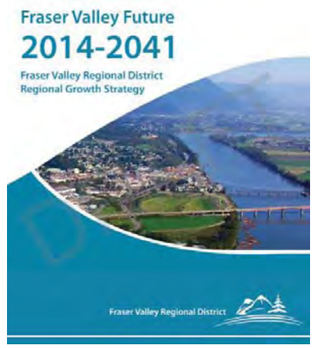
[1] Commuting Flow - Census Subdivisions: Sex (3) for the Employed Labour Force Aged 15 Years and Over Having a Usual Place of Work, for Census Subdivisions, Flows Greater than or Equal to 20, 2011 National Household Survey. http://www12.statcan.gc.ca/nhs-enm/2011/dp-pd/dt-td/Rp-eng.cfm?LANG=E&APATH=5&DETAIL=0&DIM=0&FL=A&FREE=0&GC=5909052&GID=0&GK=3&GRP=0&PID=106036&PRID=0&PTYPE=105277&S=0&SHOWALL=0&SUB=0&Temporal=2013&THEME=96&VID=0&VNAMEE=&VNAMEF=

## Employment growth relative to Regional Growth targets

As the largest community of the FVRD, Abbotsford has a more diversified economy with a larger share of manufacturing, retail trade and construction and often act as suppliers of commercial services to smaller communities. Longer term projections for the FVRD sees continued employment growth which will continue to focus on the three largest centres: Abbotsford, Chilliwack and Mission. Between 2011 and 2041, employment is expected to increase regionally by approximately 91,000, or 70%. 49% of this job growth is slated for Abbotsford.

| Employment Growth Estimates | | | |
|---|---|---|---|
| | 2011 | 2026 | 2041 |
| Abbotsford | 65,489 | 86,887 | 110,572 |
| Chilliwack | 37,278 | 51,586 | 69,729 |
| Mission | 16,983 | 21,700 | 27,085 |
| FVRD | 130,764 | 172,993 | 221,965 |

*Source: Fraser Valley RGS 2014-2041 Draft*




One of the goals of the Fraser Valley Regional Growth Strategy that pertains to the economy is:

**To realize the region's economic potential by providing opportunities in employment and education that will grow the economy by building on the region's strengths.**

Goal 1.1 Create opportunities for employment and education.
Goal 1.2 Promote growth and development in the agricultural sector.
Goal 1.3 Protect Industrial lands
Goal 1.4 Work to attain the Region's full tourism potential

According to Urban Futures[2], Abbotsford received 4,070 net additional jobs between 2006 and 2011, ranking fifth out of all Lower Mainland municipalities. This represents an 8% growth rate, which is higher than both the Metro Vancouver and FVRD overall growth rates of 6%. It was noted that the Lower Mainland's more peripheral communities are experiencing relatively rapid job growth when compared to the historical core of the region.

[2] Urban Futures, *Where have the jobs been going in the Lower Mainland?* http://www.urbanfutures.com/pow-employment Accessed 9/1/2014



## Employer Surveys

A sample of the City of Abbotsford largest employers were interviewed by CIC to gauge their size and expansion plans over the next 5, 10 and 20 years. Responses from three public sector and three private sector organizations have been compiled in Appendix C. Respondents who indicated they would be expanding were the Abbotsford School District, with an expansion of 5-10% in the next 5 years, and Cascade Aerospace Inc., with 15% in the next 5 years. The survey also collected feedback of potential employee complaints regarding 1) housing choice, 2) retail choices, and 3) Transportation. Highlights of the responses are as follows:

<u>Housing Choice</u>

- Limited new developments of single family homes and townhomes
- Housing is more expensive compared to parts of Canada where this company operated

<u>Retail Choice</u>

- Positive outlook on the growth of retail with the opening of High Street
- However, employees are still going to Langley or the United States to shop due to the lack of certain shopping options

<u>Transportation</u>

- Lack of transit cptions and connections to Vancouver and nearby cities
- Living in Abbotsford requires a car

# Retail Analysis and Forecast

## Retail Market Inventory

### Overview

CIC has created an inventory of the City of Abbotsford's current retail supply by community in accordance with the 18 communities defined by the City. This inventory focuses on major centres and streetfront retail in prominent locations for which retail industry-standard sales per SF productivity rates apply – the type of higher quality retail development that Abbotsford will want to attract moving forward. While the majority of retail centres and national standalone tenants throughout the City have been included in the inventory, some independent standalone retail tenants likely achieving sales per SF productivity rates lower than industry standard, are not represented. Similarly, service commercial/non retail tenants such as banks, medical offices, financial services, drycleaners and personal services within retail-primary centres have been included in this inventory, but standalone service commercial is not. As such, this should not be viewed as an exhaustive inventory of all retail uses currently operating within the City of Abbotsford, but as a snapshot of current supply performing at or close to industry-acceptable productivity levels.

This is a general analysis that does not further divide the retail supply into the market it serves. Although the City of Abbotsford has regional, community and neighbourhood serving retail, this analysis looks at the retail supply on an aggregate basis.

### Abbotsford Retail Inventory

**Abbotsford Retail Inventory**
**Major Retail Category**

| | 2014 | |
|---|---|---|
| | sf | $m^2$ |
| Motor vehicle and parts dealers [441] | 447,416 | 41,566 |
| Furniture and home furnishings stores [442] | 156,481 | 14,537 |
| Electronics and appliance stores [443] | 83,290 | 7,738 |
| Building material and garden equipment and supplies dealers [444] | 292,262 | 27,152 |
| Supermarkets and other grocery (except convenience) stores [44511] | 307,988 | 28,613 |
| Convenience stores [44512] | 29,745 | 2,763 |
| Specialty food stores [4452] | 68,161 | 6,332 |
| Beer, wine and liquor stores [4453] | 33,876 | 3,147 |
| Health and personal care stores [446] | 148,779 | 13,822 |
| Clothing and clothing accessories stores [448] | 199,080 | 18,495 |
| Sporting goods, hobby, book and music stores [451] | 84,765 | 7,875 |
| General merchandise stores [452] | 952,161 | 88,458 |
| Miscellaneous store retailers [453] | 158,009 | 14,679 |
| Restaurant Food & Beverage | 420,707 | 39,085 |
| Service Commercial/Non Retail | 453,471 | 42,128 |
| Leisure & Entertainment | 95,279 | 8,852 |
| **Total Retail Supply** | **3,931,469** | **365,242** |

Source: Colliers International Consulting



The table above shows the total retail inventory in the City of Abbotsford organized by North American Industry Classification System (NAICS) category. Including leisure and entertainment and service commercial/non-retail tenants (not included in NAICS), there is more than 3.9 million SF of floor area within the City. With 950,000 SF of floor area, General merchandise stores represent the largest portion of categorical floor area. This includes Walmart, Costco, Target and the other multiple large format general merchandise retailers. The Motor vehicle and parts dealers category accounts for the second largest supply of floor area with approximately 450,000 sf, followed by Restaurant Food & Beverage, Service Commercial/Non Retail and Supermarkets and other grocery stores; all of which represent more than 300,000 sf of floor area.

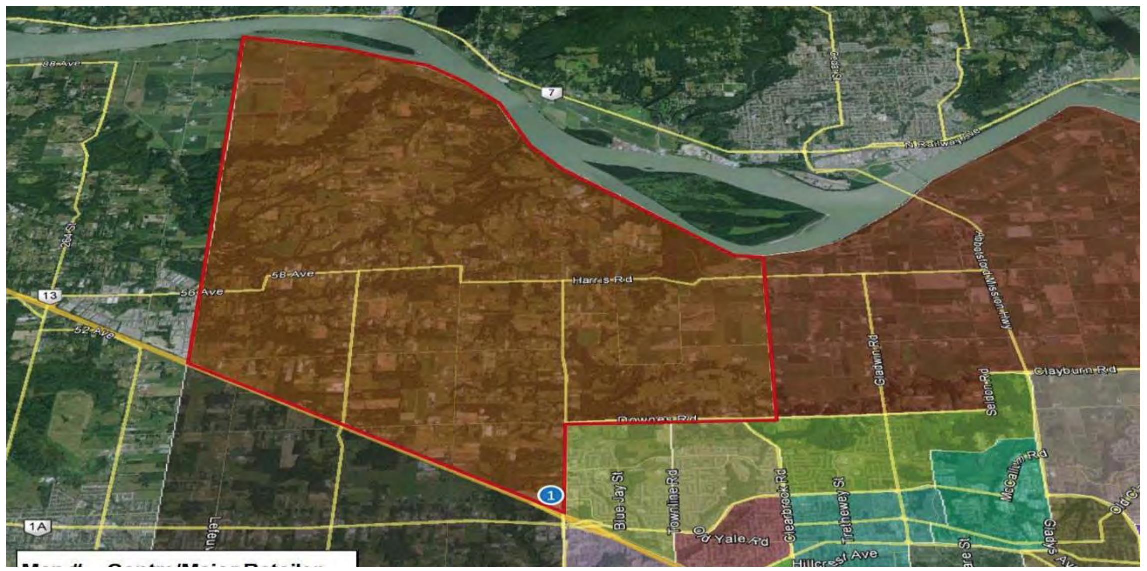
To compile this retail inventory, Colliers used internal leasing data, landlord leasing plans and satellite mapping measurements. All retail businesses have been converted to NAICS categories to enable direct comparison with the demand numbers generated in Colliers retail demand analysis.

# Retail Inventory by Community

The following section details the retail supply within each of the 18 communities.

## Bradner-Mt. Lehman

The entirety of Bradner-Mt. Lehman's retail inventory is located within the Fraser Valley Auto Mall. The nine dealerships and ancillary Restaurant food and beverage supply comprises approximately 390,000 sf.

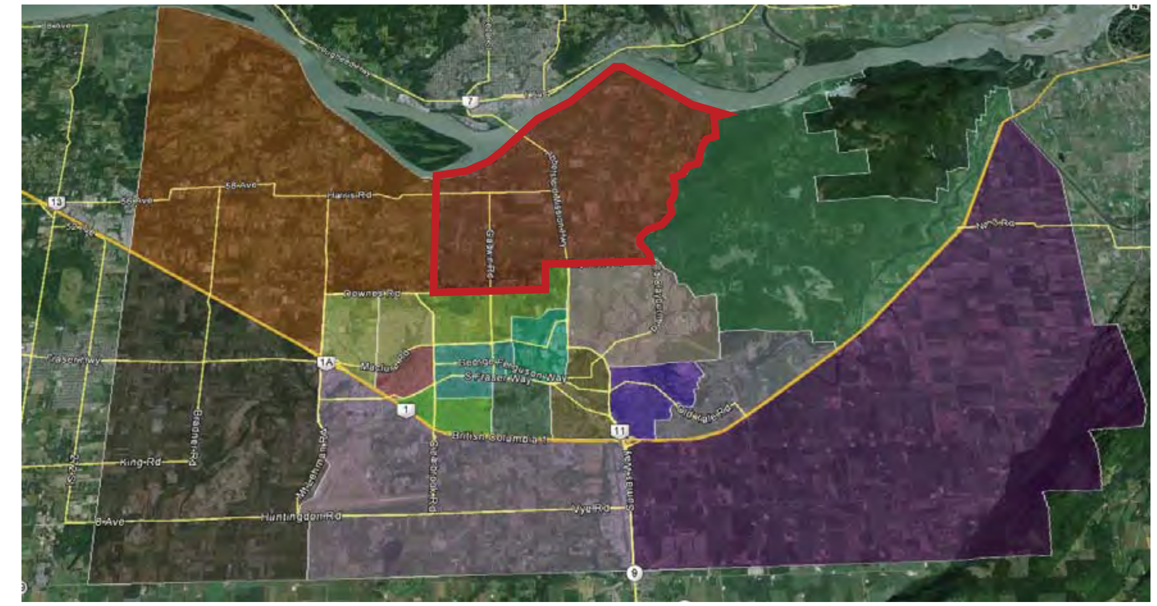



| Bradner-Mt. Lehman<br>Major Retail Category | 2014 | |
|---|---|---|
| | sf | $m^2$ |
| Motor vehicle and parts dealers [441] | 374,986 | 34,837 |
| Furniture and home furnishings stores [442] | - | - |
| Electronics and appliance stores [443] | - | - |
| Building material and garden equipment and supplies dealers [444] | - | - |
| Supermarkets and other grocery (except convenience) stores [44511] | - | - |
| Convenience stores [44512] | - | - |
| Specialty food stores [4452] | - | - |
| Beer, wine and liquor stores [4453] | - | - |
| Health and personal care stores [446] | - | - |
| Clothing and clothing accessories stores [448] | - | - |
| Sporting goods, hobby, book and music stores [451] | - | - |
| General merchandise stores [452] | - | - |
| Miscellaneous store retailers [453] | - | - |
| Restaurant Food & Beverage | 5,832 | 542 |
| Service Commercial/Non Retail | 10,000 | 929 |
| Leisure & Entertainment | - | - |
| **Total Retail Supply** | **390,818** | **36,308** |
| Source: Colliers International Consulting | | |



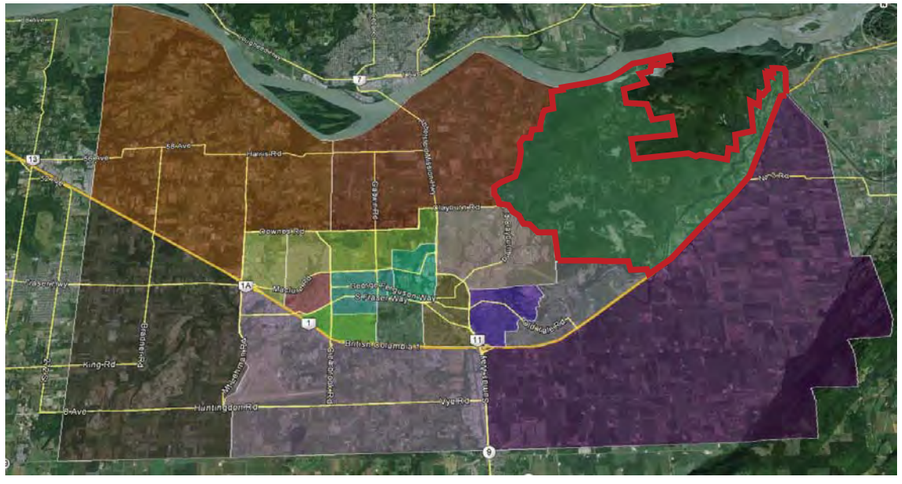
## Matsqui Prairie

There is no retail supply within the primarily rural Matsqui Prairie community.



## Sumas Mountain

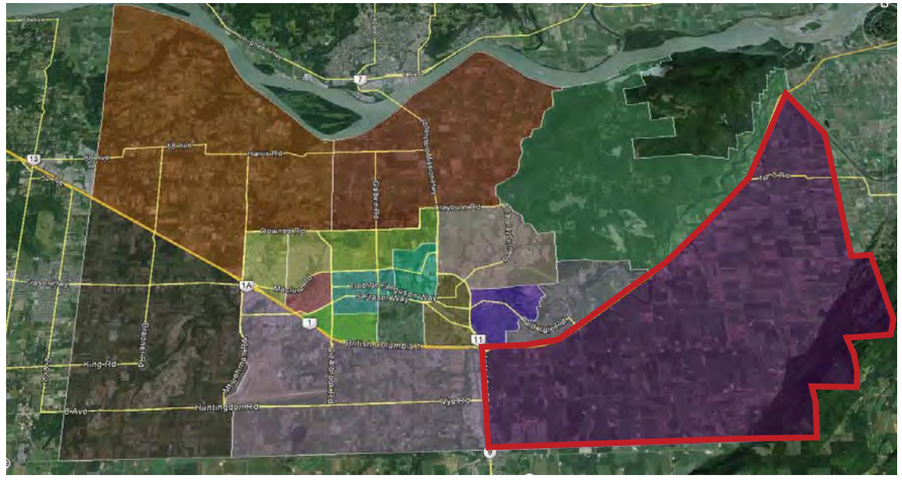
There is no retail supply within Sumas Mountain.





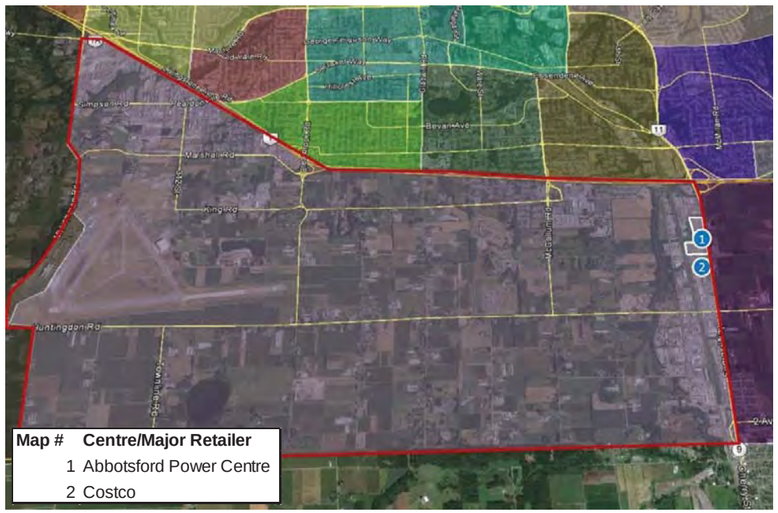

## Sumas Prairie

The primarily rural Sumas Prairie community does not contain any retail supply.



## South Poplar

Major centres and anchor tenants within the South Poplar community are the Abbotsford Power Centre, Rona and Costco. These retailers form a large format node on the west side of Sumas Way south of the Trans-Canada Highway which comprises approximately 360,000 SF of retail supply. General merchandise anchors Target and Costco account for almost 250,000 SF.




| Map # | Centre/Major Retailer |
|---|---|
| 1 | Abbotsford Power Centre |
| 2 | Costco |

**South Poplar**
**Major Retail Category**

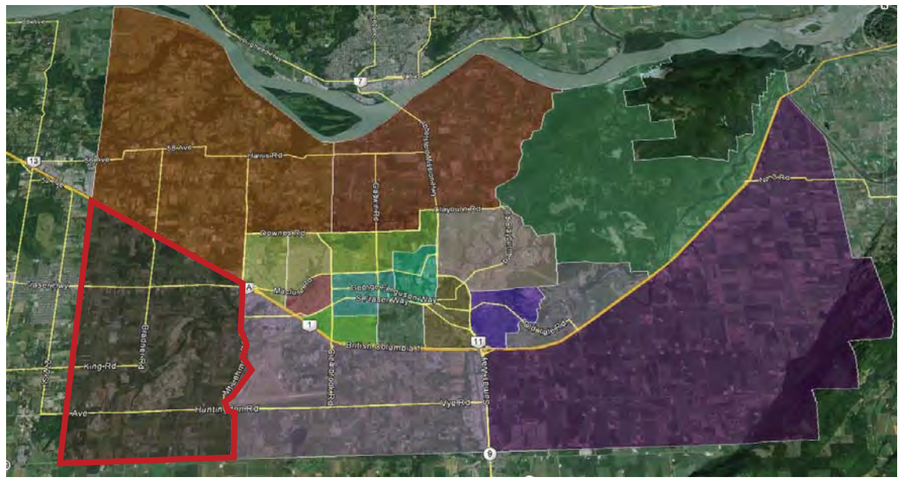
| | 2014 | |
|---|---|---|
| | sf | $m^2$ |
| Motor vehicle and parts dealers [441] | 13,214 | 1,228 |
| Furniture and home furnishings stores [442] | 25,991 | 2,415 |
| Electronics and appliance stores [443] | - | - |
| Building material and garden equipment and supplies dealers [444] | - | - |
| Supermarkets and other grocery (except convenience) stores [44511] | - | - |
| Convenience stores [44512] | - | - |
| Specialty food stores [4452] | - | - |
| Beer, wine and liquor stores [4453] | - | - |
| Health and personal care stores [446] | 2,000 | 186 |
| Clothing and clothing accessories stores [448] | 33,924 | 3,152 |
| Sporting goods, hobby, book and music stores [451] | - | - |
| General merchandise stores [452] | 246,407 | 22,892 |
| Miscellaneous store retailers [453] | 22,583 | 2,098 |
| Restaurant Food & Beverage | 10,769 | 1,000 |
| Service Commercial/Non Retail | 4,424 | 411 |
| Leisure & Entertainment | - | - |
| | | - |
| Total Retail Supply | 359,312 | 33,381 |

Source: Colliers International Consulting



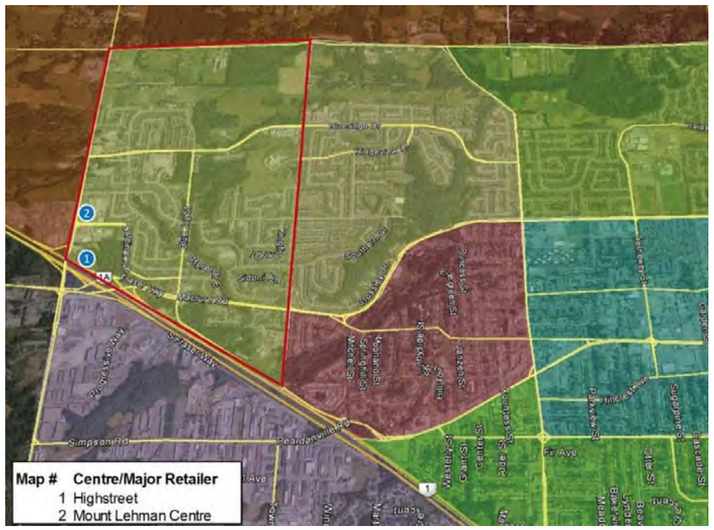
## Aberdeen

The Aberdeen community does not have any retail supply.



## West Townline

The retail inventory within West Townline is contained within two centres: Highstreet and Mount Lehman Centre. Not including current vacancies within these centres, there is approximately 600,000 sf of retail in West Townline categorically distributed in accordance with the above table. The Cineplex cinema is the largest Leisure and entertainment tenant in the City.




**West Townline**
**Major Retail Category**

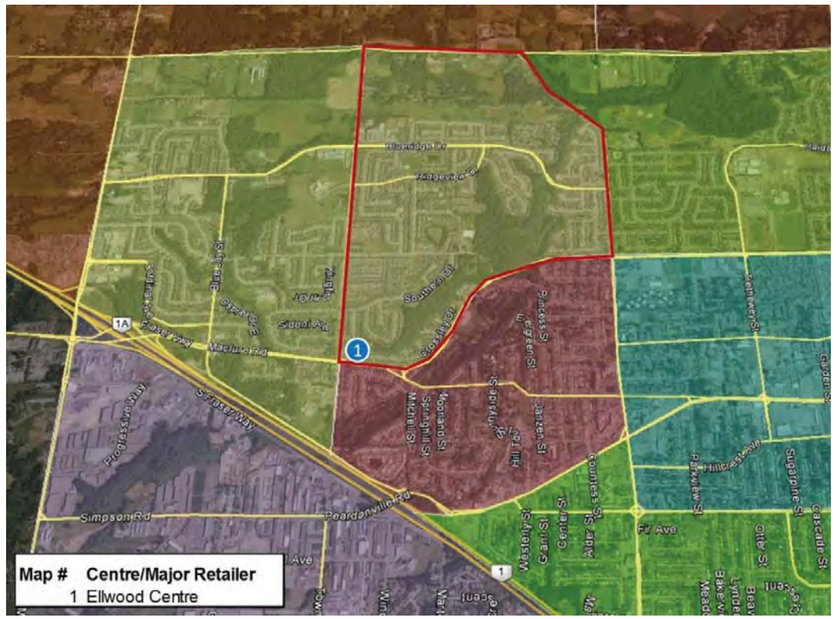
| | 2014 | |
|---|---|---|
| | sf | $m^2$ |
| Motor vehicle and parts dealers [441] | - | |
| Furniture and home furnishings stores [442] | 26,400 | 2,453 |
| Electronics and appliance stores [443] | - | - |
| Building material and garden equipment and supplies dealers [444] | - | - |
| Supermarkets and other grocery (except convenience) stores [44511] | - | - |
| Convenience stores [44512] | 2,000 | 186 |
| Specialty food stores [4452] | 5,000 | 465 |
| Beer, wine and liquor stores [4453] | 5,000 | 465 |
| Health and personal care stores [446] | 38,000 | 3,530 |
| Clothing and clothing accessories stores [448] | 76,100 | 7,070 |
| Sporting goods, hobby, book and music stores [451] | 10,000 | 929 |
| General merchandise stores [452] | 160,000 | 14,864 |
| Miscellaneous store retailers [453] | 15,000 | 1,394 |
| Restaurant Food & Beverage | 109,335 | 10,157 |
| Service Commercial | 99,000 | 9,197 |
| Leisure & Entertainment | 58,000 | 5,388 |
| Total Retail Supply | 603,835 | 56,098 |

Source: Colliers International Consulting



## East Townline

The entirety of the East Townline community's retail supply is contained within the Ellwood Centre at the corner of Maclure Road and Townline Road. This small neighbourhood centre comprises approximately 35,000 sf of retail supply.



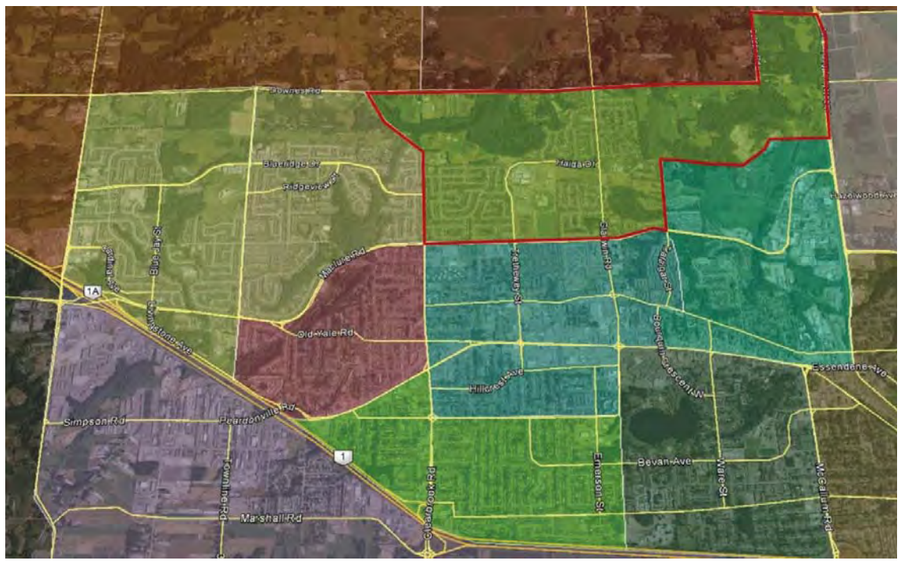

**East Townline**
**Major Retail Category**

| | 2014 | |
|---|---|---|
| | sf | $m^2$ |
| Motor vehicle and parts dealers [441] | - | - |
| Furniture and home furnishings stores [442] | - | - |
| Electronics and appliance stores [443] | - | - |
| Building material and garden equipment and supplies dealers [444] | - | - |
| Supermarkets and other grocery (except convenience) stores [44511] | - | - |
| Convenience stores [44512] | 1,750 | 163 |
| Specialty food stores [4452] | 7,000 | 650 |
| Beer, wine and liquor stores [4453] | - | - |
| Health and personal care stores [446] | 1,750 | 163 |
| Clothing and clothing accessories stores [448] | - | - |
| Sporting goods, hobby, book and music stores [451] | - | - |
| General merchandise stores [452] | 3,500 | 325 |
| Miscellaneous store retailers [453] | - | - |
| Restaurant Food & Beverage | 7,000 | 650 |
| Service Commercial | 14,000 | 1,301 |
| Leisure & Entertainment | - | - |
| Total Retail Supply | 35,000 | 3,252 |

Source: Colliers International Consulting

## Fairfield

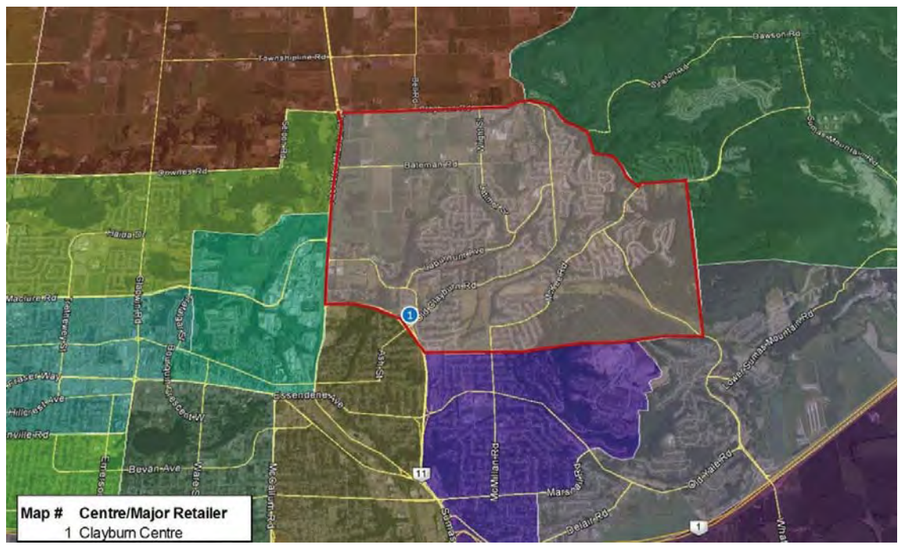
The Fairfield community does not contain any retail supply.






## Old Clayburn

Old Clayburn contains one retail centre – Clayburn Centre – accounting for just under 60,000 sf of retail supply, not including vacancies. The 18,000 SF IGA Marketplace is the single largest tenant in the community.



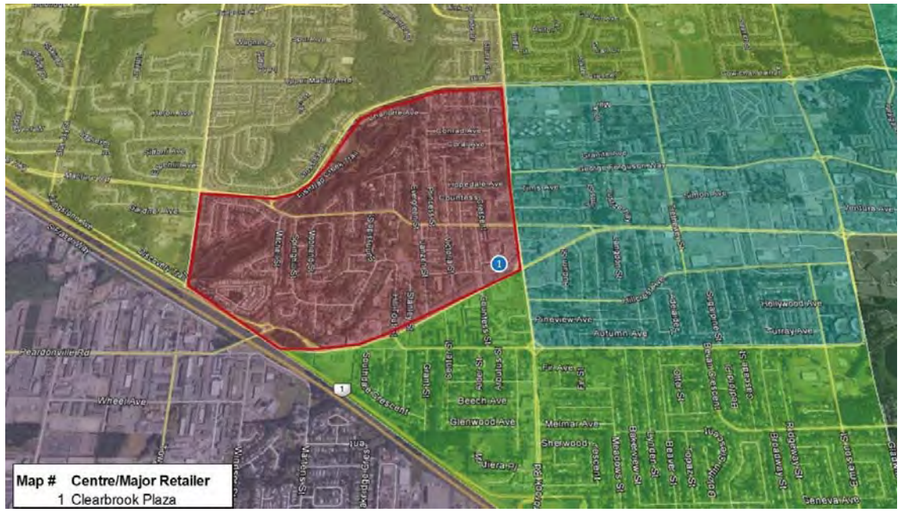

**Old Clayburn**
**Major Retail Category**

| | 2014 | |
|---|---|---|
| | sf | $m^2$ |
| Motor vehicle and parts dealers [441] | - | - |
| Furniture and home furnishings stores [442] | - | - |
| Electronics and appliance stores [443] | - | - |
| Building material and garden equipment and supplies dealers [444] | - | - |
| Supermarkets and other grocery (except convenience) stores [44511] | 18,000 | 1,672 |
| Convenience stores [44512] | 5,451 | 506 |
| Specialty food stores [4452] | 2,000 | 186 |
| Beer, wine and liquor stores [4453] | - | - |
| Health and personal care stores [446] | 6,000 | 557 |
| Clothing and clothing accessories stores [448] | - | - |
| Sporting goods, hobby, book and music stores [451] | - | - |
| General merchandise stores [452] | - | - |
| Miscellaneous store retailers [453] | 2,000 | 186 |
| Restaurant Food & Beverage | 10,500 | 975 |
| Service Commercial/Non Retail | 15,070 | 1,400 |
| Leisure & Entertainment | - | - |
| **Total Retail Supply** | **59,021** | **5,483** |

Source: Colliers International Consulting

## West Clearbrook

Clearbrook Plaza at the corner of Clearbrook Road and South Fraser Way comprises the majority of retail in the community. In addition, there are several standalone retail tenants located along the north side of South Fraser Way including Cloverdale Paint, Valley Furniture and Dairy Queen.




**West Clearbrook**
**Major Retail Category**

| | 2014 | |
|---|---|---|
| | sf | $m^2$ |
| Motor vehicle and parts dealers [441] | - | - |
| Furniture and home furnishings stores [442] | 21,407 | 1,989 |
| Electronics and appliance stores [443] | - | - |
| Building material and garden equipment and supplies dealers [444] | 4,400 | 409 |
| Supermarkets and other grocery (except convenience) stores [44511] | - | - |
| Convenience stores [44512] | - | - |
| Specialty food stores [4452] | 4,074 | 378 |
| Beer, wine and liquor stores [4453] | - | - |
| Health and personal care stores [446] | 4,074 | 378 |
| Clothing and clothing accessories stores [448] | - | - |
| Sporting goods, hobby, book and music stores [451] | - | - |
| General merchandise stores [452] | - | - |
| Miscellaneous store retailers [453] | 4,074 | 378 |
| Restaurant Food & Beverage | 11,510 | 1,069 |
| Service Commercial/Non Retail | 44,813 | 4,163 |
| Leisure & Entertainment | 8,148 | 757 |
| **Total Retail Supply** | **102,500** | **9,522** |

Source: Colliers International Consulting



## Clearbrook Centre

With two major large format grocery-anchored centres (Clearbrook Town Centre and West Oaks Shopping Centre), two major standalone large format anchors (Canadian Tire and Real Canadian Superstore) and several smaller retail centres, the Clearbrook community has the largest retail inventory in the City of Abbotsford. The 900,000 SF of supply includes almost 240,000 sf of General Merchandise floor area and just under 130,000 sf of Supermarket/grocery store floor area. The majority of the retail supply is concentrated along South Fraser Way between Trethewey Street and Gladwin Road.

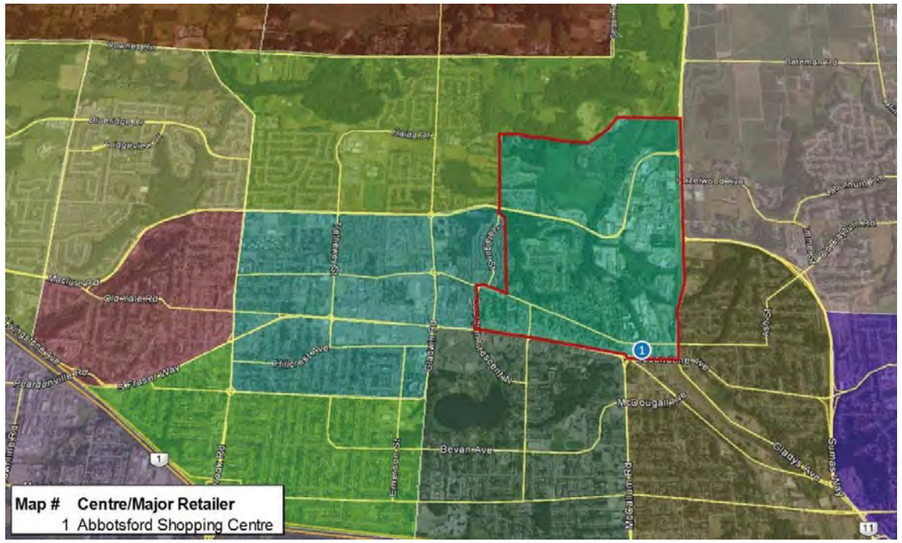
**Clearbrook Centre**
**Major Retail Category**

| | 2014 | |
|---|---|---|
| | sf | $m^2$ |
| Motor vehicle and parts dealers [441] | 45,936 | 4,268 |
| Furniture and home furnishings stores [442] | 37,819 | 3,513 |
| Electronics and appliance stores [443] | 28,974 | 2,692 |
| Building material and garden equipment and supplies dealers [444] | 25,596 | 2,378 |
| Supermarkets and other grocery (except convenience) stores [44511] | 125,964 | 11,702 |
| Convenience stores [44512] | 9,000 | 836 |
| Specialty food stores [4452] | 12,155 | 1,129 |
| Beer, wine and liquor stores [4453] | 10,103 | 939 |
| Health and personal care stores [446] | 52,773 | 4,903 |
| Clothing and clothing accessories stores [448] | 25,914 | 2,407 |
| Sporting goods, hobby, book and music stores [451] | 18,511 | 1,720 |
| General merchandise stores [452] | 237,535 | 22,068 |
| Miscellaneous store retailers [453] | 59,478 | 5,526 |
| Restaurant Food & Beverage | 98,797 | 9,178 |
| Service Commercial/Non Retail | 85,995 | 7,989 |
| Leisure & Entertainment | 23,359 | 2,170 |
| **Total Retail Supply** | **897,909** | **83,418** |

Source: Colliers International Consulting

## Babich

Babich contains one small retail centre – Abbotsford Shopping Centre – anchored by Dollar Tree. Additional retail inventory is comprised by independent tenants north of Essendene Avenue and west of West Railway Street.




**Babich**
**Major Retail Category**

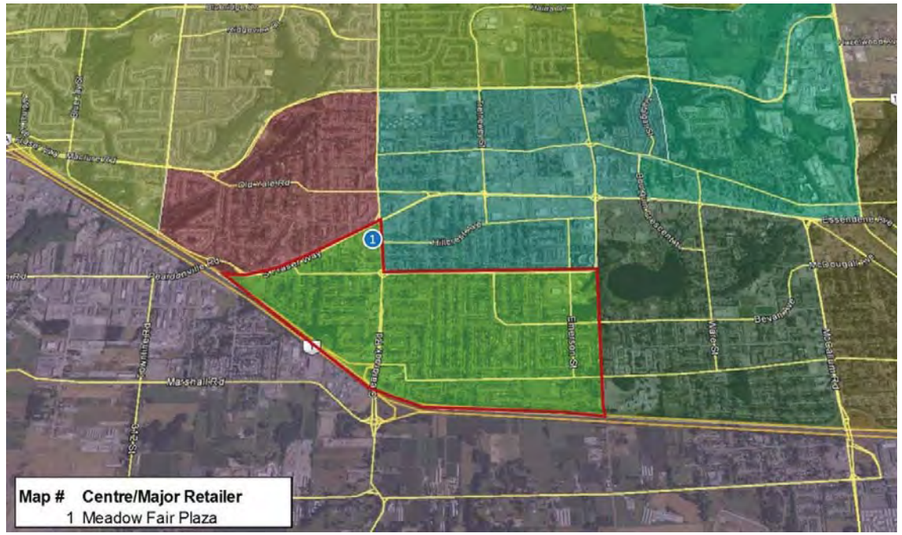
| | 2014 | |
|---|---|---|
| | sf | $m^2$ |
| Motor vehicle and parts dealers [441] | - | - |
| Furniture and home furnishings stores [442] | - | - |
| Electronics and appliance stores [443] | 2,772 | 258 |
| Building material and garden equipment and supplies dealers [444] | 2,772 | 258 |
| Supermarkets and other grocery (except convenience) stores [44511] | - | - |
| Convenience stores [44512] | - | - |
| Specialty food stores [4452] | 13,266 | 1,232 |
| Beer, wine and liquor stores [4453] | - | - |
| Health and personal care stores [446] | 2,682 | 249 |
| Clothing and clothing accessories stores [448] | 2,206 | 205 |
| Sporting goods, hobby, book and music stores [451] | 21,425 | 1,990 |
| General merchandise stores [452] | 18,000 | 1,672 |
| Miscellaneous store retailers [453] | 10,251 | 952 |
| Restaurant Food & Beverage | 22,508 | 2,091 |
| Service Commercial/Non Retail | 29,684 | 2,758 |
| Leisure & Entertainment | 2,772 | 258 |
| **Total Retail Supply** | **128,337** | **11,923** |

Source: Colliers International Consulting



## South Clearbrook

The majority of South Clearbrook's retail inventory is contained within Meadow Fair Plaza on the southwest corner of Clearbrook Road and South Fraser Way.




**South Clearbrook**
**Major Retail Category**

| | 2014 | |
|---|---|---|
| | sf | $m^2$ |
| Motor vehicle and parts dealers [441] | - | - |
| Furniture and home furnishings stores [442] | - | - |
| Electronics and appliance stores [443] | - | - |
| Building material and garden equipment and supplies dealers [444] | - | - |
| Supermarkets and other grocery (except convenience) stores [44511] | - | - |
| Convenience stores [44512] | - | - |
| Specialty food stores [4452] | 2,000 | 186 |
| Beer, wine and liquor stores [4453] | 3,638 | 338 |
| Health and personal care stores [446] | - | - |
| Clothing and clothing accessories stores [448] | - | - |
| Sporting goods, hobby, book and music stores [451] | - | - |
| General merchandise stores [452] | 7,500 | 697 |
| Miscellaneous store retailers [453] | 15,000 | 1,394 |
| Restaurant Food & Beverage | 12,298 | 1,143 |
| Service Commercial/Non Retail | 8,000 | 743 |
| Leisure & Entertainment | - | - |
| **Total Retail Supply** | **48,436** | **4,500** |

Source: Colliers International Consulting

## Mill Lake

Mill Lake contains approximately 710,000 SF of retail inventory, the second largest in Abbotsford. Sevenoaks Shopping Centre comprises the majority; approximately 550,000 sf not including vacancies.

**Mill Lake**
**Major Retail Category**

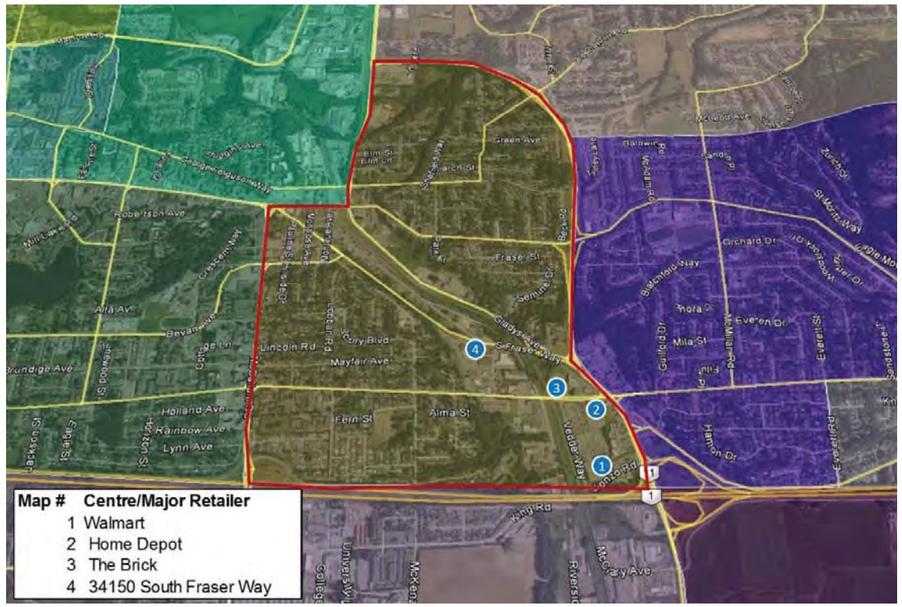
| | 2014 | |
|---|---|---|
| | sf | $m^2$ |
| Motor vehicle and parts dealers [441] | 13,280 | 1,234 |
| Furniture and home furnishings stores [442] | 5,000 | 465 |
| Electronics and appliance stores [443] | 51,544 | 4,789 |
| Building material and garden equipment and supplies dealers [444] | 27,494 | 2,554 |
| Supermarkets and other grocery (except convenience) stores [44511] | 48,483 | 4,504 |
| Convenience stores [44512] | 11,544 | 1,072 |
| Specialty food stores [4452] | 16,466 | 1,530 |
| Beer, wine and liquor stores [4453] | - | - |
| Health and personal care stores [446] | 20,000 | 1,858 |
| Clothing and clothing accessories stores [448] | 60,936 | 5,661 |
| Sporting goods, hobby, book and music stores [451] | 26,830 | 2,493 |
| General merchandise stores [452] | 279,219 | 25,940 |
| Miscellaneous store retailers [453] | 14,352 | 1,333 |
| Restaurant Food & Beverage | 58,502 | 5,435 |
| Service Commercial/Non Retail | 81,211 | 7,545 |
| Leisure & Entertainment | - | - |
| **Total Retail Supply** | **714,861** | **66,412** |

Source: Colliers International Consulting



## Abbotsford Centre

Abbotsford Centre contains approximately 310,000 sf of retail inventory, the majority of which is comprised of large format anchors Walmart and Home Depot.




**Abbotsford Centre**
**Major Retail Category**

| | 2014 | |
|---|---|---|
| | sf | $m^2$ |
| Motor vehicle and parts dealers [441] | - | - |
| Furniture and home furnishings stores [442] | 39,864 | 3,703 |
| Electronics and appliance stores [443] | - | - |
| Building material and garden equipment and supplies dealers [444] | 232,000 | 21,553 |
| Supermarkets and other grocery (except convenience) stores [44511] | - | - |
| Convenience stores [44512] | - | - |
| Specialty food stores [4452] | - | - |
| Beer, wine and liquor stores [4453] | - | - |
| Health and personal care stores [446] | - | - |
| Clothing and clothing accessories stores [448] | - | - |
| Sporting goods, hobby, book and music stores [451] | 3,000 | 279 |
| General merchandise stores [452] | - | - |
| Miscellaneous store retailers [453] | 10,000 | 929 |
| Restaurant Food & Beverage | 17,944 | 1,667 |
| Service Commercial/Non Retail | 5,000 | 465 |
| Leisure & Entertainment | 3,000 | 279 |
| **Total Retail Supply** | **310,808** | **28,875** |

Source: Colliers International Consulting

## McMillan

The McMillan Community contains approximately 140,000 sf of retail supply. Abbotsford Village comprises the majority, approximately 100,000 sf. The remainder of the supply includes standalone restaurant pads fronting Sumas Way and Glenn Mountain Village Shopping Centre.

**McMillan**
**Major Retail Category**

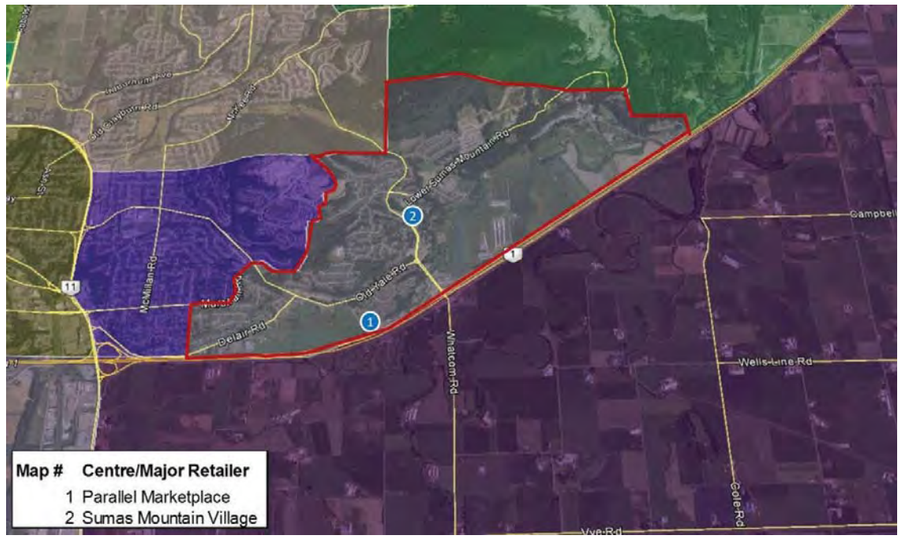
| | 2014 | |
|---|---|---|
| | sf | $m^2$ |
| Motor vehicle and parts dealers [441] | - | - |
| Furniture and home furnishings stores [442] | - | - |
| Electronics and appliance stores [443] | - | - |
| Building material and garden equipment and supplies dealers [444] | - | - |
| Supermarkets and other grocery (except convenience) stores [44511] | 35,541 | 3,302 |
| Convenience stores [44512] | - | - |
| Specialty food stores [4452] | 6,200 | 576 |
| Beer, wine and liquor stores [4453] | 10,000 | 929 |
| Health and personal care stores [446] | 2,000 | 186 |
| Clothing and clothing accessories stores [448] | - | - |
| Sporting goods, hobby, book and music stores [451] | 5,000 | 465 |
| General merchandise stores [452] | - | - |
| Miscellaneous store retailers [453] | 2,000 | 186 |
| Restaurant Food & Beverage | 52,712 | 4,897 |
| Service Commercial/Non Retail | 24,573 | 2,283 |
| Leisure & Entertainment | - | - |
| **Total Retail Supply** | **138,026** | **12,823** |

Source: Colliers International Consulting



## Whatcom

The Whatcom community contains two retail centres – Parallel Marketplace and Sumas Mountain Village, both of which are anchored by major supermarkets; a 40,000 SF Coopers Foods and a 40,000 sf Safeway respectively.




**Whatcom**
**Major Retail Category**

| | 2014 | |
|---|---|---|
| | sf | $m^2$ |
| Motor vehicle and parts dealers [441] | - | - |
| Furniture and home furnishings stores [442] | - | - |
| Electronics and appliance stores [443] | - | - |
| Building material and garden equipment and supplies dealers [444] | - | - |
| Supermarkets and other grocery (except convenience) stores [44511] | 80,000 | 7,432 |
| Convenience stores [44512] | - | - |
| Specialty food stores [4452] | - | - |
| Beer, wine and liquor stores [4453] | 5,135 | 477 |
| Health and personal care stores [446] | 19,500 | 1,812 |
| Clothing and clothing accessories stores [448] | - | - |
| Sporting goods, hobby, book and music stores [451] | - | - |
| General merchandise stores [452] | - | - |
| Miscellaneous store retailers [453] | 3,271 | 304 |
| Restaurant Food & Beverage | 3,000 | 279 |
| Service Commercial/Non Retail | 31,700 | 2,945 |
| Leisure & Entertainment | - | - |
| **Total Retail Supply** | **142,606** | **13,248** |

Source: Colliers International Consulting

## Summary

This subsection serves as an overview detailing the majority of retail supply in the City of Abbotsford. In order to fully understand the current retail over or under supply in each community, a detailed gap analysis will be required. This will be critical for the City in identifying the commercial floor area necessary for neighbourhood planning areas; however, to conduct an analysis at this level of detail is beyond the scope of this project and will require an expanded scope and corresponding budget.



# Retail Demand Analysis

Key inputs for CIC's Abbotsford-wide retail demand analysis are derived in part from CIC's detailed community demographic profiles, as well as estimates of personal disposable income which form a key step in the retail demand modeling.

## Approach to Trade Area Retail Demand Analysis

Given the City of Abbotsford's ongoing tracking of activity and demographic statistics (profiles) on a community by community basis, as well as Colliers International Consulting's more detailed demographic profiles by community covering historical change over the 2001 to 2014 period, a community growth based approach to (and model for) projecting retail demand (and support for associated floor area) was established. The growth projections are based on historical trends as well as generalized estimates of future land uses in the current OCP.

This retail model examines anticipated change within each of the City of Abbotsford's 18 defined communities and forecasts demand based on anticipated incremental growth beyond 2014 to about 2035, when the City's total population is expected to reach 200,000 residents.

CIC's approach to retail demand analysis involves the following steps:

1. Define geographic areas under review, in this case the 18 Abbotsford communities as defined by the City. Based on these City-provided community boundaries, CIC undertook detailed demographic trend analysis which provides a useful base of information for understanding community growth and change and which offers key inputs to CIC's retail demand model.
2. Isolate key trade area demographic inputs for community-driven retail demand modeling, including population growth (to a point at which the City's total population reaches a total of 200,000 residents), average household size, and forecast personal disposable income). For the Abbotsford OCP Update retail model, CIC has isolated the following particularly important variables:
    i. Anticipated population growth over the 2014-2035 period (at about which point the City of Abbotsford's total population is expected to reach 200,000 residents
    ii. Current and anticipated personal disposable income figures over the 2014-2035 period
    iii. Current and anticipated annual retail and restaurant food & beverage expenditure volume, in order to calculate incremental growth over the 2014-2035 period
3. For each community under review, calculate annual trade area expenditure potential across a broad range of retail trade categories based on retail trade data by store type (as tracked by Statistics Canada and related NAICS[3] codes) and for restaurant food & beverage uses (based on household spending survey data estimates for 2014 (as derived by Environics Analytics algorithms). Account

[3] North American Industry Classification System.

for trade area daytime employment impact on food & beverage spending where appropriate. In the case of the subject site, local employment and potential on-site employment are both likely to be significant contributors to on-site support for convenience-driven goods and services, including food & beverage.

4. Once incremental growth in annual expenditures by community are tabulated, convert these expected sales volumes into market-supportable floor area assuming a theoretical 100% local capture and industry/market-appropriate sales per SF productivity rates.

5. Quantify local (i.e. City of Abbotsford) capture of this incremental growth by applying realistic local capture rates, which tend to be lower for comparison goods retail categories (e.g. fashion/clothing) – where regional residents will travel much greater distances for specific clusters and centres (i.e. Pacific Centre, Oakridge, Metrotown) and much higher for convenience goods (e.g. retail food/supermarket) where proximity to one's place of residence is much more of a determining factor.

6. Based on net market-supportable floor area (SF) estimates for retail, restaurant food & beverage and service-commercial (i.e. local-serving office uses) categories over the 2014-2035 period, estimate likely development formats based on recent development trends and factors deemed important/critical by a variety of business types for expansion in the Abbotsford market.

7. Based on anticipated retail-commercial building needs by type, estimate approximate land use needs (SF and acres) by applying reasonable blended average floor area ratios to warranted floor area estimates by development format.



## Community by Community Demand Analysis

The demand analysis in this section is an industry-standard approach and the Colliers model is used regularly for developer, investor, retailer, and local government clients. The model calculates the retail expenditure potential from a given population based on socio-economic variables, Provincial data, and retail industry benchmarks. Expenditures are then split amongst the retail categories using the most recent Provincial profile of retail sales data from Statistics Canada.

For the City of Abbotsford OCP Update, and given important differences in demographic and income profiles across the city, CIC has investigated retail spending growth over the 2014-2035 period for each defined community. A brief explanation of CIC's approach follows, using the Mill Lake community as an example.

Given the extent of tables generated by CIC's retail demand modeling, this single community example is followed by a discussion of CIC's restaurant food & beverage spending analysis and finally a summary of overall opportunity across all of the City of Abbotsford's various communities. Detailed tables outlining CIC's retail demand analysis for each community is provided as Appendix E at the end of this report.

### Community Income (Personal Disposable Income) Levels

CIC's retail demand model is driven by estimates of personal disposable income (hereafter PDI).

Colliers' retail demand model uses Personal Disposable Income (PDI) as a basis to calculate the total retail expenditure potential within a given area. PDI is defined as the amount of money that households or individuals have available for spending after income taxes have been deducted.

**Personal Disposable Income Per Capita**
Illlustrative Community Calculation of PDI

| Factor | BC | 15. Mill Lake |
|---|---|---|
| Average Per Capita Income (2014) | $ 33,635 | $ 25,934 |
| BC PDI Per Capita (2014) | $ 31,159 | n/a |
| Income Differential | 100.00% | 77.10% |
| PDI Per Capita | $ 31,159 | $ 24,025 |

Source: Conference Board of Canada, Environics 2014 data.

The first key metric is per capita income, which in the above community case shows Mill Lake's average per capita income for 2014 at $25,934, or 77% of the B.C. figure of $33,635. Using this differential, Colliers is able to calculate the Mill Lake community's PDI per capita by adjusting the Provincial PDI (derived directly from Conference Board of Canada data) by the degree of difference between the Provincial per capita income and the community's per capita income. Multiplying the Provincial PDI per capita of $31,159 by 77.1% equals Mill Lake's estimated PDI of $24,025. This methodology allows for a local PDI but does not rely on specific income data, which can be prone to large degrees of error.

## Explanation of Retail Expenditure to Personal Disposable Income (PDI) Ratio

| 15. Mill Lake<br>Growth in Annual Resident Expenditure Potential (2014-2035) | | | | |
|---|---|---|---|---|
| | | 2014 | | 2035 |
| POPULATION | | 8,750 | | 16,200 |
| INCOME (PDI) | $ | 24,025 | $ | 29,608 |
| | | | | |
| TOTAL INCOME POTENTIAL | | $210,216,570 | | $479,648,120 |
| RETAIL SALES / INCOME | | 46.0% | | 46.0% |
| TOTAL RETAIL POTENTIAL | | **$96,628,800** | | **$220,476,600** |

Since not all disposable income is spent on retail goods, CIC reduces the PDI by a retail expenditure to PDI ratio which is also an adjusted Provincial rate from the Conference Board of Canada. The BC average retail sales to PDI ratio is 43.7%. Using an algorithm which factors in the reality that higher income does not bring about proportionately higher retail spending, CIC then calculates a retail to PDI rate for each specific community under review – in this case Mill Lake:

## Community Specific Retail Expenditure Calculations

| 15. Mill Lake<br>Growth in Annual Resident Expenditure Potential (2014-2035) | | | | |
|---|---|---|---|---|
| | | 2014 | | 2035 |
| POPULATION | | 8,750 | | 16,200 |
| INCOME (PDI) | $ | 24,025 | $ | 29,608 |
| | | | | |
| TOTAL INCOME POTENTIAL | | $210,216,570 | | $479,648,120 |
| RETAIL SALES / INCOME | | 46.0% | | 46.0% |
| TOTAL RETAIL POTENTIAL | | **$96,628,800** | | **$220,476,600** |
| | | | | |
| Motor vehicle and parts dealers [441] | $ | 30,218,024 | $ | 68,948,048 |
| Furniture and home furnishings stores [442] | $ | 3,489,676 | $ | 7,962,347 |
| Electronics and appliance stores [443] | $ | 3,742,389 | $ | 8,538,958 |
| Building material and garden equipment and supplies dealers [444] | $ | 5,438,413 | $ | 12,408,753 |
| Food and beverage stores [445] | $ | 19,865,851 | $ | 45,327,638 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ | 14,667,028 | $ | 33,465,554 |
| Convenience stores [44512] | $ | 1,096,934 | $ | 2,502,859 |
| Specialty food stores [4452] | $ | 748,617 | $ | 1,708,109 |
| Beer, wine and liquor stores [4453] | $ | 3,353,274 | $ | 7,651,119 |
| Health and personal care stores [446] | $ | 4,425,246 | $ | 10,097,023 |
| Gasoline stations [447] | $ | 14,155,790 | $ | 32,299,070 |
| Clothing and clothing accessories stores [448] | $ | 6,038,579 | $ | 13,778,142 |
| Sporting goods, hobby, book and music stores [451] | $ | 2,651,821 | $ | 6,050,624 |
| General merchandise stores [452] | $ | 13,206,618 | $ | 30,133,357 |
| Miscellaneous store retailers [453] | $ | 2,424,608 | $ | 5,532,194 |
| TOTAL - MAJOR RETAIL CATEGORIES (3-Digit NAICS Codes, Some 4-Digit C | $ | **105,657,000** | $ | **241,076,000** |
| Source: Colliers International Consulting | | | | |



The residential population (in this case over the 2014-2035 period), along with category-specific spending estimates derived from Statistics Canada retail trade data determine Colliers' projection of retail expenditure potential. The chart above depicts the total expenditure potential for the Mill Lake community by major retail category. The aggregate annual retail expenditure generated by this community's residential population is projected to grow from about $106 million currently (2014) to roughly $241 million by 2035. It is important to mention that this is not the amount spent locally. It is the amount spent by residents, wherever they make retail purchases in stores, including on trips, during lunch breaks at work (often in other nearby municipalities), and regular trips to the supermarket.

## Projected Growth In Retail Expenditure Potential By Community

CIC then calculates growth in each community's total annual retail expenditure potential, as shown below for the Mill Lake community:

| 15. Mill Lake<br>Projected Resident Sales Capture by Relevant Category | | | | | | |
|---|---|---|---|---|---|---|
| Major Retail Category | | 2014 | | 2035 | | Incremental Demand |
| | | | | | | |
| Motor vehicle and parts dealers [441] | $ | 30,218,024 | $ | 68,948,048 | $ | 38,730,024 |
| Furniture and home furnishings stores [442] | $ | 3,490,000 | $ | 7,962,000 | $ | 4,472,000 |
| Electronics and appliance stores [443] | $ | 3,742,000 | $ | 8,539,000 | $ | 4,797,000 |
| Building material and garden equipment and supplies dealers [444] | $ | 5,438,000 | $ | 12,409,000 | $ | 6,971,000 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ | 14,667,000 | $ | 33,466,000 | $ | 18,799,000 |
| Convenience stores [44512] | $ | 1,097,000 | $ | 2,503,000 | $ | 1,406,000 |
| Specialty food stores [4452] | $ | 749,000 | $ | 1,708,000 | $ | 959,000 |
| Beer, wine and liquor stores [4453] | $ | 3,353,000 | $ | 7,651,000 | $ | 4,298,000 |
| Health and personal care stores [446] | $ | 4,425,000 | $ | 10,097,000 | $ | 5,672,000 |
| Gasoline stations [447] | $ | 14,156,000 | $ | 32,299,000 | $ | 18,143,000 |
| Clothing and clothing accessories stores [448] | $ | 6,039,000 | $ | 13,778,000 | $ | 7,739,000 |
| Sporting goods, hobby, book and music stores [451] | $ | 2,652,000 | $ | 6,051,000 | $ | 3,399,000 |
| General merchandise stores [452] | $ | 13,207,000 | $ | 30,133,000 | $ | 16,926,000 |
| Miscellaneous store retailers [453] | $ | 2,425,000 | $ | 5,532,000 | $ | 3,107,000 |
| TOTAL, NET RETAIL EXPENDITURES - Above Categories | **$** | **105,658,000** | **$** | **241,076,000** | **$** | **135,418,000** |
| Source: Colliers International Consulting - Rounded to nearest $1,000. | | | | | | |

This shows that growth in this community, combined with evolving demographic and spending characteristics is projected to generate an increase in annual retail expenditure potential of roughly $135 million by 2035.

From these figures, market supportable floor area (SF) can be estimated based on a theoretical 100% market capture of this incremental growth and by dividing this incremental sales volume growth by an appropriate target sales per SF productivity rate. These calculations are shown in the following Mill Lake community example:

It is important to note that, as this floor area support estimate assumes 100% market capture, CIC must then make an adjustment based on realistic local market capture on a category by category basis.

Given that future retail-commercial facilities in the City of Abbotsford could locate anywhere in the city that offers the right mix of critical success factors (i.e. accessibility, exposure, complementary surrounding land uses, etc.), CIC has taken the following approach to determining city-wide potential based on anticipated growth to a population of 200,000 residents:

- Project total supportable floor area based on theoretical 100% market capture for each community under review and sum for city-wide potential
- Project realistic City of Abbotsford capture rates by category, based on an understanding of outflow spending rates by category. Local (i.e. City of Abbotsford) capture of future spending will be highest in convenience retail categories such as Supermarkets and other grocery stores, Health and personal care stores, and Beer, wine and liquor stores. These rates will be much lower in comparison to retail goods categories such as Clothing and clothing accessories stores.
- Undertake a similar analysis for each community's restaurant food & beverage spending, using Environics' 2014 data estimates derived from historical Census spending surveys.
- Calculate total City of Abbotsford potential for retail, restaurant and service-commercial uses by summing the projected net support for each reviewed community.
- Allocated projected market-supportable floor area (SF) by recommended development format (i.e. stand-alone/specialty cluster, mixed-use/street district, neighbourhood and community shopping centre).
- Review projected floor area (SF) totals by anticipated development format and estimate general land use needs based on format-applicable floor area ratios.



## Community-By-Community Restaurant Food & Beverage Analysis

Estimates of trade area household and per capita spending on restaurant food and beverage for an illustrative list of Abbotsford communities is summarized in the following table:

**City of Abbotsford**
**Resident Food & Beverage Spending By Community - Household & Per Capita Estimates (2014)**

| | Avg. Household Spending | | | | |
|---|---|---|---|---|---|
| Spending Category | 1. Bradner-Mt. Lehman | 2. Matsqui Prairie | 3. Sumas Mountain | 4. Sumas Prairie | 5. South Poplar |
| Food purchased from restaurants | $2,868 | $1,964 | $2,604 | $1,730 | $2,358 |
| Alcohol purchased at licensed establishments | $711 | $236 | $504 | $258 | $423 |
| ***Average household size*** | ***2.98*** | ***3.63*** | ***3.29*** | ***3.23*** | ***2.91*** |
| | **Average Per Capita Spending** | | | | |
| **Spending Category** | **1. Bradner-Mt. Lehman** | **2. Matsqui Prairie** | **3. Sumas Mountain** | **4. Sumas Prairie** | **5. South Poplar** |
| Food purchased from restaurants | $962 | $541 | $791 | $536 | $810 |
| Alcohol purchased at licensed establishments | $239 | $65 | $153 | $80 | $145 |
| **Sub-Total: Food/Drink** | **$1,201** | **$606** | **$945** | **$615** | **$956** |

Source: Colliers PCensus areas, Environics 2013 Household Spending Survey data.

Using these figures, and applying projected population growth figures to 2035 (total City of Abbotsford population of 200,000 residents), yields the following incremental growth calculations for these and the remaining City of Abbotsford communities:

**City of Abbotsford**
**Restaurant Food & Beverage Expenditure Potential**
**Incremental Growth (2014-2030)**

| | Per Cap F&B Spending | | Population | | F&B Spending Potential ($000s) | | | |
|---|---|---|---|---|---|---|---|---|
| Community | 2014 | 2035 | 2014 | 2035 | 2014 | 2035 | Incremental Growth | Supportable Floor Area (SF) |
| 1. Bradner-Mt. Lehman | $1,201 | $1,480 | 3,950 | 4,100 | $4,744,000 | $6,068,000 | $1,324,000 | 1,800 |
| 2. Matsqui Prairie | $606 | $747 | 2,130 | 2,200 | $1,291,000 | $1,643,000 | $352,000 | 500 |
| 3. Sumas Mountain | $945 | $1,164 | 4,250 | 13,600 | $4,015,000 | $15,833,000 | $11,818,000 | 16,300 |
| 4. Sumas Prairie | $615 | $759 | 3,460 | 3,500 | $2,130,000 | $2,655,000 | $525,000 | 700 |
| 5. South Poplar | $956 | $1,178 | 8,080 | 13,000 | $7,722,000 | $15,311,000 | $7,589,000 | 10,500 |
| 6. Aberdeen | $710 | $875 | 6,305 | 7,900 | $4,475,000 | $6,909,000 | $2,434,000 | 3,400 |
| 7. West Townline | $659 | $813 | 10,410 | 12,800 | $6,864,000 | $10,401,000 | $3,537,000 | 4,900 |
| 8. East Townline | $644 | $794 | 11,465 | 12,100 | $7,383,000 | $9,603,000 | $2,220,000 | 3,100 |
| 9. Fairfield | $771 | $950 | 9,075 | 9,700 | $6,998,000 | $9,219,000 | $2,221,000 | 3,100 |
| 10. Old Clayburn | $838 | $1,033 | 17,325 | 22,500 | $14,517,000 | $23,234,000 | $8,717,000 | 12,000 |
| 11. West Clearbrook | $712 | $878 | 6,010 | 7,000 | $4,279,000 | $6,143,000 | $1,864,000 | 2,600 |
| 12. Clearbrook Centre | $738 | $910 | 12,750 | 23,200 | $9,415,000 | $21,113,000 | $11,698,000 | 16,100 |
| 13. Babich | $858 | $1,057 | 5,230 | 8,000 | $4,487,000 | $8,458,000 | $3,971,000 | 5,500 |
| 14. South Clearbrook | $706 | $870 | 7,800 | 10,100 | $5,508,000 | $8,789,000 | $3,281,000 | 4,500 |
| 15. Mill Lake | $818 | $1,008 | 8,750 | 16,200 | $7,156,000 | $16,329,000 | $9,173,000 | 12,700 |
| 16. Abbotsford Centre | $868 | $1,070 | 8,710 | 15,200 | $7,564,000 | $16,267,000 | $8,703,000 | 12,000 |
| 17. McMillan | $981 | $1,209 | 8,040 | 10,900 | $7,890,000 | $13,183,000 | $5,293,000 | 7,300 |
| 18. Whatcom | $1,066 | $1,313 | 6,260 | 8,000 | $6,670,000 | $10,505,000 | $3,835,000 | 5,300 |
| **Total - City of Abbotsford** | | | **140,000** | **200,000** | **$113,108,000** | **$201,663,000** | **$88,555,000** | **122,100** |

Note: Supportable floor area based on 100% capture, sales productivity per sf of: $ 725
Source: City-supplied community boundary files, Environics 2014 data estimates for household spending on food and beverage, Colliers calculations.

## Projected Total Floor Area (SF) Support By Community – Theoretical 100% Market Capture of Incremental Growth

Total projected (incremental) floor area potential (100% capture) for all retail categories, as well as restaurant food and beverage uses, is outlined below:

**City of Abbotsford**
**Retail Floor Area Support By Community (100% Capture of Incremental Spending Growth - 2014-35)**

| Retail Trade Category | | 1. Bradner-Mt. Lehman | 2. Matsqui Prairie | 3. Sumas Mountain | 4. Sumas Prairie | 5. South Poplar | 6. Aberdeen | 7. West Townline | 8. East Townline | 9. Fairfield |
|---|---|---|---|---|---|---|---|---|---|---|
| Motor vehicle and parts dealers [441] | | 6,500 | 2,300 | 70,700 | 3,800 | 36,800 | 14,700 | 17,700 | 11,600 | 11,300 |
| Furniture and home furnishings stores [442] | | 1,500 | 500 | 16,500 | 900 | 8,600 | 3,400 | 4,100 | 2,700 | 2,700 |
| Electronics and appliance stores [443] | | 700 | 300 | 7,800 | 400 | 4,100 | 1,600 | 2,000 | 1,300 | 1,300 |
| Building material and garden equipment and supplies dealers [444] | | 2,400 | 800 | 25,700 | 1,400 | 13,400 | 5,400 | 6,400 | 4,200 | 4,100 |
| Supermarkets and other grocery (except convenience) stores [44511] | | 13,900 | 5,100 | 14,400 | 9,200 | 22,400 | 16,200 | 20,600 | 23,100 | 21,500 |
| Convenience stores [44512] | | 200 | 100 | 2,600 | 100 | 1,300 | 500 | 600 | 400 | 400 |
| Specialty food stores [4452] | | 200 | 100 | 2,300 | 100 | 1,200 | 500 | 600 | 400 | 400 |
| Beer, wine and liquor stores [4453] | | 700 | 200 | 7,400 | 400 | 3,900 | 1,500 | 1,900 | 1,200 | 1,200 |
| Health and personal care stores [446] | | 900 | 300 | 10,300 | 600 | 5,400 | 2,200 | 2,600 | 1,700 | 1,700 |
| Clothing and clothing accessories stores [448] | | 2,100 | 700 | 22,400 | 1,200 | 11,700 | 4,700 | 5,600 | 3,700 | 3,600 |
| Sporting goods, hobby, book and music stores [451] | | 1,000 | 400 | 11,000 | 600 | 5,700 | 2,300 | 2,800 | 1,800 | 1,800 |
| General merchandise stores [452] | | 5,000 | 1,800 | 55,000 | 2,900 | 28,600 | 11,500 | 13,800 | 9,000 | 8,800 |
| Miscellaneous store retailers [453] | | 800 | 300 | 9,000 | 500 | 4,700 | 1,900 | 2,300 | 1,500 | 1,400 |
| **Supportable Floor Area - Above Retail Trade Categories** | | **35,900** | **12,900** | **255,100** | **22,100** | **147,800** | **66,400** | **81,000** | **62,600** | **60,200** |
| *Restaurant Food & Beverage Support* | | ***1,800*** | ***500*** | ***16,300*** | ***700*** | ***10,500*** | ***3,400*** | ***4,900*** | ***3,100*** | ***3,100*** |

Source: Colliers International Consulting

**City of Abbotsford**
**Retail Floor Area Support By Community (100% Capture of Incremental Spending Growth - 2014-35)**

| Retail Trade Category | 10. Old Clayburn | 11. West Clearbrook | 12. Clearbrook Centre | 13. Babich | 14. South Clearbrook | 15. Mill Lake | 16. Abbotsford Centre | 17. McMillan | 18. Whatcom | City of Abbotsford Totals |
|---|---|---|---|---|---|---|---|---|---|---|
| Motor vehicle and parts dealers [441] | 53,100 | 9,500 | 62,800 | 17,500 | 15,900 | 43,500 | 42,100 | 28,800 | 20,000 | 468,600 |
| Furniture and home furnishings stores [442] | 12,400 | 2,200 | 14,700 | 4,100 | 3,700 | 10,200 | 9,800 | 6,700 | 4,700 | 109,400 |
| Electronics and appliance stores [443] | 5,900 | 1,000 | 6,900 | 1,900 | 1,700 | 4,800 | 4,600 | 3,200 | 2,200 | 51,700 |
| Building material and garden equipment and supplies dealers [444] | 19,300 | 3,400 | 22,900 | 6,400 | 5,800 | 15,800 | 15,300 | 10,500 | 7,300 | 170,500 |
| Supermarkets and other grocery (except convenience) stores [44511] | 53,000 | 13,000 | 30,300 | 11,800 | 16,000 | 20,400 | 22,000 | 25,700 | 20,900 | 359,500 |
| Convenience stores [44512] | 1,900 | 300 | 2,300 | 600 | 600 | 1,600 | 1,500 | 1,000 | 700 | 16,700 |
| Specialty food stores [4452] | 1,700 | 300 | 2,100 | 600 | 500 | 1,400 | 1,400 | 900 | 700 | 15,400 |
| Beer, wine and liquor stores [4453] | 5,600 | 1,000 | 6,600 | 1,800 | 1,700 | 4,600 | 4,400 | 3,000 | 2,100 | 49,200 |
| Health and personal care stores [446] | 7,800 | 1,400 | 9,200 | 2,600 | 2,300 | 6,400 | 6,200 | 4,200 | 2,900 | 68,700 |
| Clothing and clothing accessories stores [448] | 16,900 | 3,000 | 19,900 | 5,500 | 5,000 | 13,800 | 13,400 | 9,100 | 6,400 | 148,700 |
| Sporting goods, hobby, book and music stores [451] | 8,300 | 1,500 | 9,800 | 2,700 | 2,500 | 6,800 | 6,600 | 4,500 | 3,100 | 73,200 |
| General merchandise stores [452] | 41,300 | 7,400 | 48,800 | 13,600 | 12,300 | 33,900 | 32,800 | 22,400 | 15,600 | 364,500 |
| Miscellaneous store retailers [453] | 6,800 | 1,200 | 8,000 | 2,200 | 2,000 | 5,500 | 5,400 | 3,700 | 2,600 | 59,800 |
| **Supportable Floor Area - Above Retail Trade Categories** | **234,000** | **45,200** | **244,300** | **71,300** | **70,000** | **168,700** | **165,500** | **123,700** | **89,200** | **1,955,900** |
| *Restaurant Food & Beverage Support* | ***12,000*** | ***2,600*** | ***16,100*** | ***5,500*** | ***4,500*** | ***12,700*** | ***12,000*** | ***7,300*** | ***5,300*** | ***122,300*** |

Source: Colliers International Consulting



## Projected Total Floor Area (SF) Support By Community – Net Local (City of Abbotsford) Support Based on Realistic Local Capture Rates

Total net projected (incremental) floor area support by community (based on realistic local capture rates) is outlined in the following two tables:

**City of Abbotsford**
**Retail Floor Area Support By Community (Realistic Local Capture of Incremental Spending Growth - 2014-35)**

| Retail Trade Category | Target Market Share (Abbotsford) | 1. Bradner-Mt. Lehman | 2. Matsqui Prairie | 3. Sumas Mountain | 4. Sumas Prairie | 5. South Poplar | 6. Aberdeen | 7. West Townline | 8. East Townline | 9. Fairfield |
|---|---|---|---|---|---|---|---|---|---|---|
| Motor vehicle and parts dealers [441] | 40% | 2,600 | 900 | 28,300 | 1,500 | 14,700 | 5,900 | 7,100 | 4,600 | 4,500 |
| Furniture and home furnishings stores [442] | 40% | 600 | 200 | 6,600 | 400 | 3,400 | 1,400 | 1,600 | 1,100 | 1,100 |
| Electronics and appliance stores [443] | 50% | 400 | 200 | 3,900 | 200 | 2,100 | 800 | 1,000 | 700 | 700 |
| Building material and garden equipment and supplies dealers [444] | 50% | 1,200 | 400 | 12,900 | 700 | 6,700 | 2,700 | 3,200 | 2,100 | 2,100 |
| Supermarkets and other grocery (except convenience) stores [44511] | 75% | 10,400 | 3,800 | 10,800 | 6,900 | 16,800 | 12,200 | 15,500 | 17,300 | 16,100 |
| Convenience stores [44512] | 75% | 200 | 100 | 2,000 | 100 | 1,000 | 400 | 500 | 300 | 300 |
| Specialty food stores [4452] | 65% | 100 | 100 | 1,500 | 100 | 800 | 300 | 400 | 300 | 300 |
| Beer, wine and liquor stores [4453] | 75% | 500 | 200 | 5,600 | 300 | 2,900 | 1,100 | 1,400 | 900 | 900 |
| Health and personal care stores [446] | 75% | 700 | 200 | 7,700 | 500 | 4,100 | 1,700 | 2,000 | 1,300 | 1,300 |
| Clothing and clothing accessories stores [448] | 40% | 800 | 300 | 9,000 | 500 | 4,700 | 1,900 | 2,200 | 1,500 | 1,400 |
| Sporting goods, hobby, book and music stores [451] | 50% | 500 | 200 | 5,500 | 300 | 2,900 | 1,200 | 1,400 | 900 | 900 |
| General merchandise stores [452] | 60% | 3,000 | 1,100 | 33,000 | 1,700 | 17,200 | 6,900 | 8,300 | 5,400 | 5,300 |
| Miscellaneous store retailers [453] | 50% | 400 | 200 | 4,500 | 300 | 2,400 | 1,000 | 1,200 | 800 | 700 |
| **Supportable Floor Area - Above Retail Trade Categories** | | **21,400** | **7,900** | **131,300** | **13,500** | **79,700** | **37,500** | **45,800** | **37,200** | **35,600** |
| Restaurant Food & Beverage Support | 50% | 900 | 250 | 8,150 | 350 | 5,250 | 1,700 | 2,450 | 1,550 | 1,550 |
| ***Sub-Total - Retail and Restaurant Food & Beverage Support*** | | ***22,300*** | ***8,150*** | ***139,450*** | ***13,850*** | ***84,950*** | ***39,200*** | ***48,250*** | ***38,750*** | ***37,150*** |
| Service-Commercial / Locally-Serving Office Support (% of above) | 30% | 6,700 | 2,400 | 41,800 | 4,200 | 25,500 | 11,800 | 14,500 | 11,600 | 11,100 |
| **TOTAL - ABOVE RETAIL-COMMERCIAL CATEGORIES (000s SF)** | | **29,000** | **11,000** | **181,000** | **18,000** | **110,000** | **51,000** | **63,000** | **50,000** | **48,000** |

Source: Colliers International Consulting

In reality, the actual regional spending habits of the city's residents will vary by community, reflecting differences in demographic profiles, income levels, place of work, and relative proximity to competitive retail facilities and centres.

For the purpose of this background research report and the extent of the study period, a city-wide capture rate by category is deemed appropriate. Higher capture rates are appropriate for the more convenience-oriented categories (i.e. day to day needs), while lower capture rates are more realistic for comparison retail goods categories such as clothing and accessories, motor vehicles, and furniture and home furnishings stores. This is a direct result of the extent and quality of major super-regional centres and clusters available throughout the Lower Mainland.

Market support for the remaining communities is outlined in the second part of this table, outlined on the following page:

**City of Abbotsford**
**Retail Floor Area Support By Community (Realistic Local Capture of Incremental Spending Growth - 2014-35)**

| Retail Trade Category | Target Market Share (Abbotsford) | 10. Old Clayburn | 11. West Clearbrook | 12. Clearbrook Centre | 13. Babich | 14. South Clearbrook | 15. Mill Lake | 16. Abbotsford Centre | 17. McMillan | 18. Whatcom | City of Abbotsford Totals |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Motor vehicle and parts dealers [441] | 40% | 21,200 | 3,800 | 25,100 | 7,000 | 6,400 | 17,400 | 16,800 | 11,500 | 8,000 | 187,300 |
| Furniture and home furnishings stores [442] | 40% | 5,000 | 900 | 5,900 | 1,600 | 1,500 | 4,100 | 3,900 | 2,700 | 1,900 | 43,900 |
| Electronics and appliance stores [443] | 50% | 3,000 | 500 | 3,500 | 1,000 | 900 | 2,400 | 2,300 | 1,600 | 1,100 | 26,300 |
| Building material and garden equipment and supplies dealers [444] | 50% | 9,700 | 1,700 | 11,500 | 3,200 | 2,900 | 7,900 | 7,700 | 5,300 | 3,700 | 85,600 |
| Supermarkets and other grocery (except convenience) stores [44511] | 75% | 39,800 | 9,800 | 22,700 | 8,900 | 12,000 | 15,300 | 16,500 | 19,300 | 15,700 | 269,800 |
| Convenience stores [44512] | 75% | 1,400 | 200 | 1,700 | 500 | 500 | 1,200 | 1,100 | 800 | 500 | 12,800 |
| Specialty food stores [4452] | 65% | 1,100 | 200 | 1,400 | 400 | 300 | 900 | 900 | 600 | 500 | 10,200 |
| Beer, wine and liquor stores [4453] | 75% | 4,200 | 800 | 5,000 | 1,400 | 1,300 | 3,500 | 3,300 | 2,300 | 1,600 | 37,200 |
| Health and personal care stores [446] | 75% | 5,900 | 1,100 | 6,900 | 2,000 | 1,700 | 4,800 | 4,700 | 3,200 | 2,200 | 52,000 |
| Clothing and clothing accessories stores [448] | 40% | 6,800 | 1,200 | 8,000 | 2,200 | 2,000 | 5,500 | 5,400 | 3,600 | 2,600 | 59,600 |
| Sporting goods, hobby, book and music stores [451] | 50% | 4,200 | 800 | 4,900 | 1,400 | 1,300 | 3,400 | 3,300 | 2,300 | 1,600 | 37,000 |
| General merchandise stores [452] | 60% | 24,800 | 4,400 | 29,300 | 8,200 | 7,400 | 20,300 | 19,700 | 13,400 | 9,400 | 218,800 |
| Miscellaneous store retailers [453] | 50% | 3,400 | 600 | 4,000 | 1,100 | 1,000 | 2,800 | 2,700 | 1,900 | 1,300 | 30,300 |
| **Supportable Floor Area - Above Retail Trade Categories** | | **130,500** | **26,000** | **129,900** | **38,900** | **39,200** | **89,500** | **88,300** | **68,500** | **50,100** | **1,070,800** |
| Restaurant Food & Beverage Support | 50% | 6,000 | 1,300 | 8,050 | 2,750 | 2,250 | 6,350 | 6,000 | 3,650 | 2,650 | 61,150 |
| ***Sub-Total - Retail and Restaurant Food & Beverage Support*** | | ***136,500*** | ***27,300*** | ***137,950*** | ***41,650*** | ***41,450*** | ***95,850*** | ***94,300*** | ***72,150*** | ***52,750*** | ***1,131,950*** |
| Service-Commercial / Locally-Serving Office Support (% of above) | 30% | 41,000 | 8,200 | 41,400 | 12,500 | 12,400 | 28,800 | 28,300 | 21,600 | 15,800 | 339,600 |
| **TOTAL - ABOVE RETAIL-COMMERCIAL CATEGORIES (000s SF)** | | **178,000** | **36,000** | **179,000** | **54,000** | **54,000** | **125,000** | **123,000** | **94,000** | **69,000** | **1,471,550** |

Source: Colliers International Consulting

CIC projects service-commercial demand as a proportion of total retail and restaurant floor area as this serves as a good approximation not only of population growth which drives need for local personal and professional services, but also of the mix observed in retail-commercial projects across a variety of development formats.



## Market Supportable Floor Area by Recommended Development Format & Category

CIC projects the following development format proportions to meet anticipated market need:

**City of Abbotsford**
**Market-Supportable Floor Space By Recommended Product Type**

| | % of Opportunity By Recommended Development Format | | | |
|---|---|---|---|---|
| Retail-Commercial Category | Stand-Alone or Specialty Cluster | Mixed-Use / Street District | Neighbourhood Shopping Centre | Community Shopping Centre |
| Motor vehicle and parts dealers [441] | 80% | 20% | 0% | 0% |
| Furniture and home furnishings stores [442] | 10% | 30% | 30% | 30% |
| Electronics and appliance stores [443] | 10% | 20% | 30% | 40% |
| Building material and garden equipment and supplies dealers [444] | 30% | 10% | 10% | 50% |
| Supermarkets and other grocery (except convenience) stores [44511] | 10% | 20% | 50% | 20% |
| Convenience stores [44512] | 10% | 50% | 20% | 20% |
| Specialty food stores [4452] | 10% | 50% | 30% | 10% |
| Beer, wine and liquor stores [4453] | 10% | 40% | 30% | 20% |
| Health and personal care stores [446] | 20% | 20% | 30% | 30% |
| Clothing and clothing accessories stores [448] | 0% | 40% | 20% | 40% |
| Sporting goods, hobby, book and music stores [451] | 10% | 25% | 25% | 40% |
| General merchandise stores [452] | 20% | 10% | 10% | 60% |
| Miscellaneous store retailers [453] | 10% | 30% | 30% | 30% |
| Restaurant Food & Beverage Support | 20% | 40% | 20% | 20% |
| Service-Commercial / Locally-Serving Office Support (% of above) | 20% | 20% | 30% | 30% |

**Source: Colliers International Consulting.**

These figures then yield net floor area by development format and associated land needs as follows:

**City of Abbotsford**
**Market-Supportable Floor Space By Recommended Product Type**

| | Total Floor Area Support By Development Format (SF) | | | | |
|---|---|---|---|---|---|
| Retail-Commercial Category | Stand-Alone or Specialty Cluster | Mixed-Use / Street District | Neighbourhood Shopping Centre | Community Shopping Centre | Total By Category |
| Motor vehicle and parts dealers [441] | 149,840 | 37,460 | 0 | 0 | 187,300 |
| Furniture and home furnishings stores [442] | 4,390 | 13,170 | 13,170 | 13,170 | 43,900 |
| Electronics and appliance stores [443] | 2,630 | 5,260 | 7,890 | 10,520 | 26,300 |
| Building material and garden equipment and supplies dealers [444] | 25,680 | 8,560 | 8,560 | 42,800 | 85,600 |
| Supermarkets and other grocery (except convenience) stores [44511] | 26,980 | 53,960 | 134,900 | 53,960 | 269,800 |
| Convenience stores [44512] | 1,280 | 6,400 | 2,560 | 2,560 | 12,800 |
| Specialty food stores [4452] | 1,020 | 5,100 | 3,060 | 1,020 | 10,200 |
| Beer, wine and liquor stores [4453] | 3,720 | 14,880 | 11,160 | 7,440 | 37,200 |
| Health and personal care stores [446] | 10,400 | 10,400 | 15,600 | 15,600 | 52,000 |
| Clothing and clothing accessories stores [448] | 0 | 23,840 | 11,920 | 23,840 | 59,600 |
| Sporting goods, hobby, book and music stores [451] | 3,700 | 9,250 | 9,250 | 14,800 | 37,000 |
| General merchandise stores [452] | 43,760 | 21,880 | 21,880 | 131,280 | 218,800 |
| Miscellaneous store retailers [453] | 3,030 | 9,090 | 9,090 | 9,090 | 30,300 |
| Restaurant Food & Beverage Support | 12,230 | 24,460 | 12,230 | 12,230 | 61,150 |
| Service-Commercial / Locally-Serving Office Support (% of above) | 67,920 | 67,920 | 101,880 | 101,880 | 339,600 |
| **Floor Area Totals By Development Format** | **357,000** | **312,000** | **363,000** | **440,000** | |
| Blended Average FSR by Development Format | 0.25 | 0.40 | 0.28 | 0.28 | |
| Estimated Site Area Requirement (to nearest 1,000 SF) | 1,428,000 | 780,000 | 1,296,000 | 1,571,000 | |
| ***Estimated Site Area Requirement (hectares)*** | ***13*** | ***7*** | ***12*** | ***15*** | ***47*** |
| ***Estimated Site Area Requirement (acres)*** | ***33*** | ***18*** | ***30*** | ***36*** | ***116*** |

**Source: Colliers International Consulting.**

This total potential by recommended product type is also summarized in terms of sq. metres of floor area as follows:

**City of Abbotsford**
**Market-Supportable Floor Space By Recommended Product Type**

| | Total Floor Area Support By Development Format (Sq. M.) | | | | |
|---|---|---|---|---|---|
| Retail-Commercial Category | Stand-Alone or Specialty Cluster | Mixed-Use / Street District | Neighbourhood Shopping Centre | Community Shopping Centre | Total By Category |
| Motor vehicle and parts dealers [441] | 13,921 | 3,480 | 0 | 0 | 17,401 |
| Furniture and home furnishings stores [442] | 408 | 1,224 | 1,224 | 1,224 | 4,078 |
| Electronics and appliance stores [443] | 244 | 489 | 733 | 977 | 2,443 |
| Building material and garden equipment and supplies dealers [444] | 2,386 | 795 | 795 | 3,976 | 7,953 |
| Supermarkets and other grocery (except convenience) stores [44511] | 2,507 | 5,013 | 12,533 | 5,013 | 25,065 |
| Convenience stores [44512] | 119 | 595 | 238 | 238 | 1,189 |
| Specialty food stores [4452] | 95 | 474 | 284 | 95 | 948 |
| Beer, wine and liquor stores [4453] | 346 | 1,382 | 1,037 | 691 | 3,456 |
| Health and personal care stores [446] | 966 | 966 | 1,449 | 1,449 | 4,831 |
| Clothing and clothing accessories stores [448] | 0 | 2,215 | 1,107 | 2,215 | 5,537 |
| Sporting goods, hobby, book and music stores [451] | 344 | 859 | 859 | 1,375 | 3,437 |
| General merchandise stores [452] | 4,065 | 2,033 | 2,033 | 12,196 | 20,327 |
| Miscellaneous store retailers [453] | 281 | 844 | 844 | 844 | 2,815 |
| Restaurant Food & Beverage Support | 1,136 | 2,272 | 1,136 | 1,136 | 5,681 |
| Service-Commercial / Locally-Serving Office Support (% of above) | 6,310 | 6,310 | 9,465 | 9,465 | 31,550 |
| **Floor Area Totals By Development Format** | **33,000** | **29,000** | **34,000** | **41,000** | |
| Blended Average FSR by Development Format | 0.25 | 0.40 | 0.28 | 0.28 | |
| Estimated Site Area Requirement (to nearest 1,000 sq. metres) | 133,000 | 72,000 | 120,000 | 146,000 | |
| ***Estimated Site Area Requirement (hectares)*** | ***13*** | ***7*** | ***12*** | ***15*** | ***47*** |
| ***Estimated Site Area Requirement (acres)*** | ***33*** | ***18*** | ***30*** | ***36*** | ***116*** |

**Source: Colliers International Consulting.**



# Industrial Analysis and Forecast

## Historical Trends and Context

Abbotsford's industrial market has experienced volatility in absorption, construction and vacancy rates over the past decade. Absorption volatility could be attributed to a few large users and tenants entering and exiting this smaller market. However, construction activity has decreased significantly since 2010. The last large speculative development, located on the 2200 block of Queen Street, was delivered in 2008, with only smaller developments at Maclure Business Park and mid-sized built-to-suit developments constructed since.

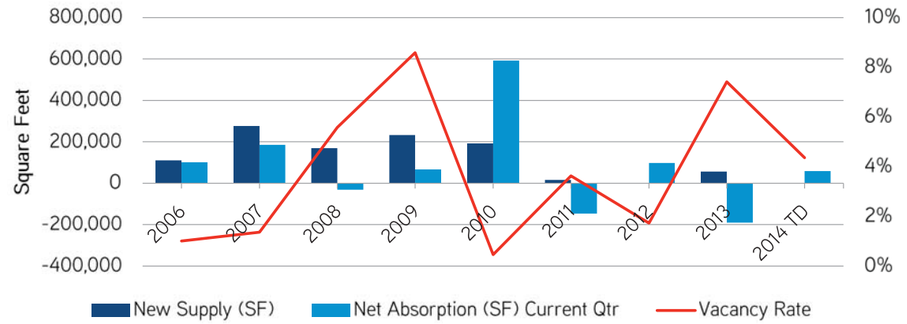



**Figure 1** Abbotsford Market Statistics[4]

Abbotsford's industrial building inventory growth, although slow since 2010, has mirrored other major markets in the Fraser Valley, which also saw a lull in construction due to economic uncertainty. As shown in Figure 3, industrial floor space in almost all markets across the Lower Mainland has not kept up with population growth.

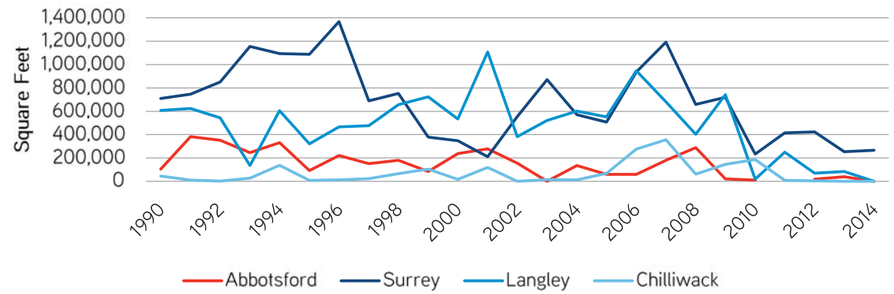



**Figure 2** Industrial Building Inventory Constructed by Year[5]

[4] Colliers International

| | 2006 | | | 2014 | | | 2006 - 2014 Change | | |
|---|---|---|---|---|---|---|---|---|---|
| | Population | Floor Space Sq. ft. | Floor Space/ Capita | Population (2014 Estimates) | Floor space Sq. ft. | Floor Space/ Capita | Population | Floor Space Sq. ft. | Floor Space/ Capita |
| Burnaby/New Westminster | 261,348 | 23,914,104 | 92 | 320,977 | 28,095,935 | 88 | 59,629 | 4,181,831 | (4) |
| Delta | 96,723 | 23,755,454 | 246 | 107,186 | 25,887,202 | 242 | 10,463 | 2,131,748 | (4) |
| Langley | 117,332 | 15,973,385 | 136 | 143,139 | 18,575,647 | 130 | 25,807 | 2,602,262 | (6) |
| North Shore | 169,858 | 4,240,604 | 25 | 180,416 | 4,716,763 | 26 | 10,558 | 476,159 | 1 |
| Tri-Cities | 194,764 | 13403972 | 69 | 239,619 | 14,628,854 | 61 | 44,855 | 1,224,882 | (8) |
| Richmond | 174,461 | 28,262,663 | 162 | 211,570 | 33,951,699 | 160 | 37,109 | 5,689,036 | (2) |
| Ridge-Meadows | 84,572 | 2,149,470 | 25 | 102,520 | 2,679,936 | 26 | 17,948 | 530,466 | 1 |
| Surrey | 394,976 | 26,927,782 | 68 | 519,984 | 31,947,196 | 61 | 125,008 | 5,019,414 | (7) |
| Vancouver | 578,041 | 19,110,169 | 33 | 650,600 | 19,844,228 | 31 | 72,559 | 734,059 | (3) |
| Abbotsford | 129,350 | 6,610,188 | 51 | 140,000 | 7,481,460 | 53 | 10,650 | 871,272 | 2 |
| Chilliwack | 69,217 | 2077674 | 30 | 83,869 | 3108825 | 37 | 14,652 | 1,031,151 | 7 |
| Lower Mainland | 2,270,642 | 166,425,465 | 73 | 2,699,880 | 190,917,745 | 71 | 429,238 | 24,492,280 | (3) |

**Figure 3** Industrial Floor Space per Capita Estimates 2006-2014

At the time of writing, Surrey and Langley have more than 1,000,000 square feet and 770,000 square feet of industrial spaced scheduled to complete construction by year end 2015, respectively. Despite an uptick in development permits in 2014, only 125,000 square feet of space is scheduled to complete in Abbotsford during the same time period.

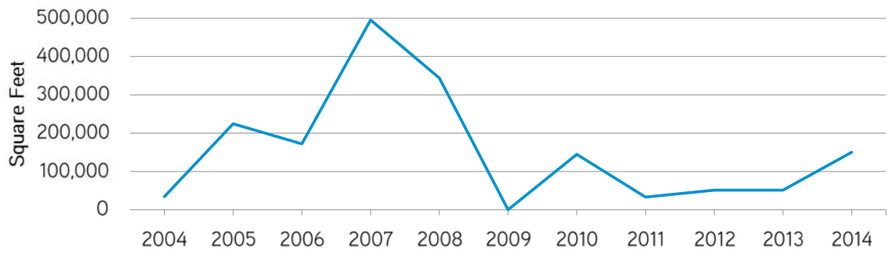



**Figure 4** Abbotsford Issued Warehouse & Manufacturing Building Permits (Total Square Feet)[6]

Studies such as Metro Vancouver's 2012 "Market Readiness of Vacant Industrial Land Report" and NAIOP's 2013 analysis of it have concluded that the Lower Mainland is facing a critical shortage of industrial land supply. NAIOP estimates that the current inventory represents only a 10 to 12 year supply from 2013[7]. Given that vacancy rates have remained stable despite new additions to building inventory over the past several years, it's reasonable to

[5] Colliers International, BC Assessment
[6] City of Abbotsford
[7] NAIOP, Analysis of Metro Vancouver's 2012 Market Readiness of Vacant Industrial Lands Report, June 2013



assume that land availability is driving absorption in the Lower Mainland. In response to this shortage, average floor space ratios in the majority of Lower Mainland markets, including Abbotsford, have increased substantially since last measured in 1997. However, a critical shortage of land suitable to attract and retain larger logistics tenants is a competitive disadvantage of the region. As we will demonstrate in the following section, Abbotsford also has a dwindling supply of parcel options available to developers and larger users in the short-term.

| | Average Floor Space Ratios | | |
|---|---|---|---|
| City | 1997[8] | 2014[9] | Change |
| Vancouver | 65% | 83% | 18% |
| North Vancouver | NA | 75% | NA |
| Port Moody | 54% | 64% | 10% |
| Richmond | 43% | 58% | 15% |
| Burnaby | 39% | 50% | 11% |
| Surrey | 23% | 47% | 24% |
| Port Coquitlam | 33% | 44% | 11% |
| New Westminster | 46% | 40% | -6% |
| Delta | 30% | 40% | 10% |
| Coquitlam | 29% | 39% | 10% |
| Langley | 22% | 37% | 15% |
| Pitt Meadows | NA | 34% | NA |
| Abbotsford | 17% | 33% | 16% |
| Maple Ridge | NA | 33% | NA |
| Chilliwack | NA | 26% | NA |
| Metro Vancouver | 36% | 47% | 10% |

**Figure 5** Average Floor Space Ratios

[8] 2004 Abbotsford City in the Country Plan
[9] Colliers International

# Current Industrial Inventory

## Industrial Building Inventory

The industrial real estate market in the City of Abbotsford contains approximately 7,481,460 square feet of industrial buildings[10]. The Abbotsford market is smaller than both Surrey (31,947,196 square feet) and Langley (18,575,647 square feet) but larger than neighbouring Chilliwack (3,108,825 square feet). Abbotsford's industrial building inventory also has a larger proportion of older buildings but smaller proportion of manufacturing buildings than other municipalities in the Fraser Valley.

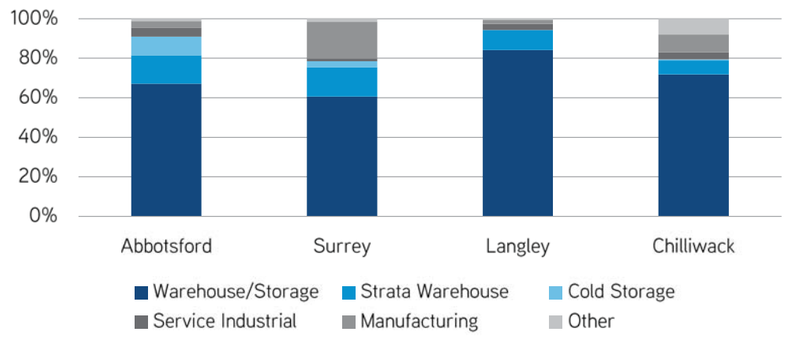



**Figure 6** Industrial Building Inventory Distribution by Use[11]

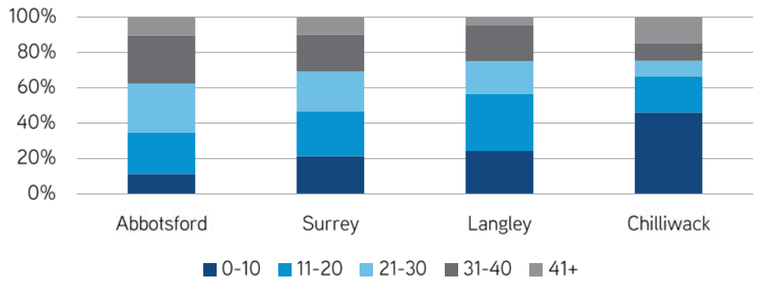



**Figure 7** Age (Years) Distribution of Industrial Building Inventory[12]

[10] Excludes airports, airplane hangars, auto salvage facilities, car dealerships, cement/gravel plants, chemical/oil refineries, contractor storage yards, landfills, lumberyards, railroad yards, self-storage, shipyards, utility sub-stations, vacant lots, and water treatment facilities.

[11] Colliers International, BC Assessment

[12] See previous.



## Industrial Land Inventory

The City of Abbotsford contains approximately 1,240 acres of industrial-zoned land, and another additional 620 acres designated as 'industrial' in the City's 2005 Official Community Plan[13]. The largest proportion of the City's industrial-zoned land is improved with warehousing, industrial strata, cold storage, and manufacturing buildings. However, 172 acres currently have non-industrial improvements such as single family dwellings or primarily office-use buildings. An additional 155 acres is vacant, zoned and available for future development, this presents an increase over the 29 acres identified as zoned and vacant in the City's 2004 City in the Country Plan.

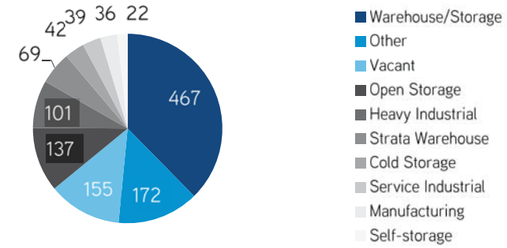



**Figure 8** Industrial-Zoned Land Inventory by Use (Acres)[14]

Of approximately 1,863 acres of industrial land, both zoned and OCP-designated, 905 acres are either vacant or currently being utilized for non-industrial or low-intensity uses. Although this presents long-term development potential, most of these sites are not yet zoned and serviced or suffer from configuration problems making them unsuitable for industrial development. In the near term, 155 acres are vacant, zoned, and available for development. However only four parcels larger than 10 acres are available for developers and uses such as larger cold storage facilities, manufacturers and transportation companies. The industrial lands can be further subdivided into six submarkets (excluding the Airport). A discussion of each submarket is provided in the following pages.

| | Land Inventory[15] | | |
|---|---|---|---|
| Submarket | Zoned Industrial | OCP not Zoned | Total |
| Fraser Highway | 16.3 | 29.0 | 45.3 |
| Mt. Lehman | 43.7 | 181.5 | 225.2 |
| Peardonville | 380.9 | 172.8 | 553.7 |
| Clearbrook | 79.8 | 163.68 | 243.48 |
| McCallum | 196.7 | 30.9 | 227.6 |
| Sumas | 304.0 | 42.4 | 346.4 |
| Other | 221.2 | 0 | 252.1 |
| Total | 1242.6 | 620.3 | 1862.9 |

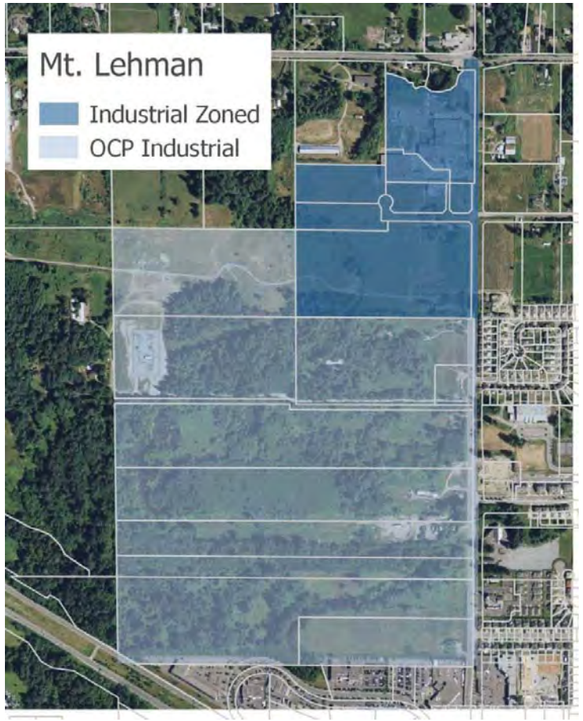
| | Count of Vacant Parcels[16] |
|---|---|
| <1 acre | 103 |
| 1-5 acres | 20 |
| 5-10 accres | 4 |
| 10-15 acres | 3 |
| 15+ acres | 1 |

[13] Excludes lands designated as 'Industrial Reserve'.

[14] Colliers International, BC Assessment

[15] Excludes airport lands and OCP 'Industrial Reserve' designation.

[16] Of the 155 zoned and vacant acres.




**Land Inventory:** 225 acres
**Vacant/Outdoor Storage:** 211 acres
**Building Inventory:** 114,970 square feet
**Average Building Age:** 40 years
**Average FSR:** 0.27

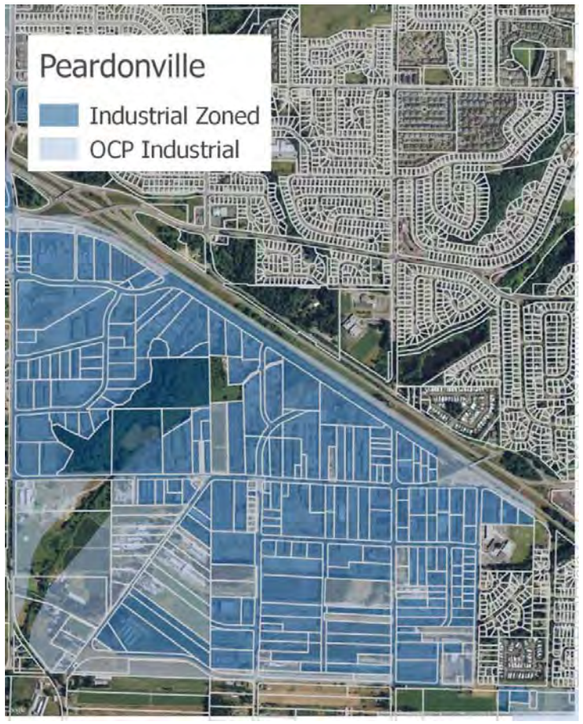
## Mt. Lehman

After a successful application for removal from the Agricultural Land Reserve in 2005, the Mt. Lehman contains few existing industrial buildings but offers approximately 211 acres of undeveloped OCP-industrial land. However, this figure can be misleading as topographical issues and environmentally sensitive areas in the middle of this submarket substantially restrict development potential.

**Land Inventory:** 225 acres
**Vacant/Outdoor Storage:** 211 acres
**Building Inventory:** 114,970 square feet
**Average Building Age:** 40 years
**Average FSR:** 0.27

## Fraser Highway

Out of the 45 acres of land in the Fraser Highway submarket, 34 acres are either vacant or being utilized for low-intensity uses such as open storage. This area has significant potential for more development in the future.




**Land Inventory:** 554 acres
**Vacant/Outdoor Storage:** 248 acres
**Building Inventory:** 3,645,792 square feet
**Average Building Age:** 22 years
**Average FSR:** 0.40

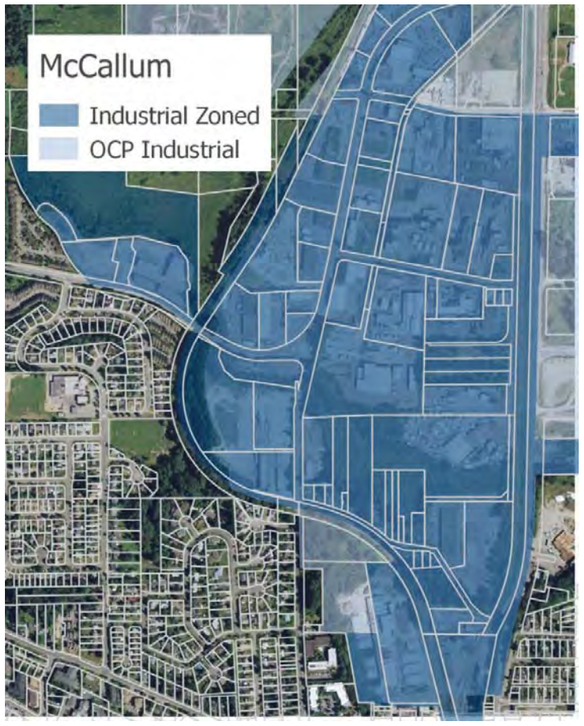
## Peardonville

As Abbotsford's largest submarket, Peardonville contains the region's largest and newest building inventory by square footage. The typical properties in this area also feature a much higher floor space ratio, indicating that land in this market is being used most intensively. Peardonville also contains more than 248 acres of vacant or low-intensity use land which can be available for future development. However, many of these parcels suffer from configuration issues as they tend to be long and narrow.

**Land Inventory:** 243 acres
**Vacant/Outdoor Storage:** 166 acres
**Building Inventory:** 625,945 square feet
**Average Building Age:** 33 years
**Average FSR:** 0.41

## Clearbrook

Of the 243 acres in this submarket, approximately 166 acres are either vacant, being utilized for outdoor storage, or non-industrial uses.




**Land Inventory:** 227 acres
**Vacant/Outdoor Storage:** 101 acres
**Building Inventory:** 724,889 square feet
**Average Building Age:** 30 years
**Average FSR:** 0.24

## McCallum

Of 227 acres of land in McCallum, 101 acres are vacant or low-intensity use parcels. The parcels with significant improvements also contain a lower FSR on average than more developed markets such as Peardonville. This could represent potential for intensifying the use of parcels in this submarket, however, parcels with access to rail can also be efficiently used for open storage due to a limited supply of rail access in the Lower Mainland.

**Land Inventory:** 346 acres
**Vacant/Outdoor Storage:** 144 acres
**Building Inventory:** 1,546,771 square feet
**Average Building Age:** 26 years
**Average FSR:** 0.21

## Sumas

Abbotsford's second largest submarket contains approximately 144 acres of vacant or low-intensity use parcels. Additionally, of the parcels containing significant improvements, the average floor space ratio is approximately half that of Peardonville. As with McCallum, this lower FSR is expected given the areas access to two railway lines.

## West Abbotsford Business Park

An application to exclude a further 225.53 acres from the ALR is currently being reviewed. This exclusion could allow for the development of West Abbotsford Business Park, a master-planned development designed to attract logistics facility ranging from 100,000 to 500,000 square feet on 30 to 40 acre parcels. As discussed previously. Lots of this size are scarce in Abbotsford and the Lower Mainland in general. West Abbotsford Business Park would be located just east of Langley's Gloucester Industrial Estates, a mature but highly sought-after 6.7 million square-foot industrial park. As of the second quarter of 2014, Gloucester's vacancy rate was the lowest in the Fraser Valley, only 1.2 percent. Only a few parcels owned by The Beedie Group remain, and the park is expected to be fully built out by 2017. The West Abbotsford Business Park project is well-positioned to take advantage of high user and tenant demand for the Gloucester area. It also represents a unique opportunity for attracting large users that would otherwise opt out of the Lower Mainland for less restrictive markets such as Calgary.





## Demand Drivers and Forecast

In Abbotsford's 2004 City in the Country plan, the City projected its floor space needs over a 20 year forecast horizon into 2023. Based on strong, positive commercial real estate market conditions at the time, the City estimated a 6 percent per annum growth rate of industrial inventory. Abbotsford's industrial inventory was forecasted to surpass 12 million square feet by 2013. However, due to a combination of lack of land supply, a slower economic environment, and competition from markets with more availability and ease of access, such as Surrey, 2013's actual inventory reached only 7,481,460 square feet.

**Figure 27 Historical Industrial Floor Space Estimates**

| | Inventory | | % |
|---|---|---|---|
| | Sq. m. | Sq. ft | Increase |
| 1987 | 221,958 | 2,389,485 | -- |
| 1988 | 230,760 | 2,484,230 | 3.97% |
| 1989 | 251,339 | 2,705,743 | 8.92% |
| 1990 | 267,116 | 2,875,567 | 6.28% |
| 1991 | 292,079 | 3,144,269 | 9.34% |
| 1992 | 315,948 | 3,401,195 | 8.17% |
| 1993 | 337,919 | 3,637,691 | 6.95% |
| 1994 | 354,536 | 3,816,556 | 4.92% |
| 1995 | 363,849 | 3,916,801 | 2.63% |
| 1996 | 399,585 | 4,301,243 | 9.82% |
| 1997 | 419,506 | 4,515,678 | 4.99% |
| 1998 | 441,736 | 4,754,967 | 5.30% |
| 1999 | 476,914 | 5,133,636 | 7.96% |
| 2000 | 531,921 | 5,725,732 | 11.53% |
| 2001 | 561,628 | 6,045,504 | 5.58% |
| 2002 | 590,039 | 6,351,330 | 5.06% |
| 2003 | 616,693 | 6,638,242 | 4.52% |

*Based on 1996 BC Assessment Authority data and building permit statistics*
*Figures prior to 1995 may not include all former District of Abbotsford Industrial Areas or Data*

**Figure 28 Projected Floor Space Increase 2003 to 2023 – based on 15 yr historical average**

| | Sq. m. | Sq. ft |
|---|---|---|
| 2003 | 616,693 | 6,638,242 |
| 2008 | 829,175 | 8,925,452 |
| 2013 | 1,114,866 | 12,000,716 |
| 2018 | 1,498,994 | 16,135,561 |
| 2023 | 2,015,472 | 21,695,066 |

| | |
|---|---|
| 6% | 15 year average % increase |
| 15,056,824 | Additional Floorspace – 2003 to 2023 |

**Figure 9** Excerpt from the 2004 City in the Country Plan

Colliers re-projected industrial inventory and land needs based on employment growth expectations estimated in the Fraser Valley Regional District's 2014 Regional Growth Strategy plan. A more conservative estimate based on historical construction and absorption is also provided.

Assumptions included in the forecast based on employment growth were:

- 2011 total employed labour force with Abbotsford as place of work[17] 47,075
- Employment growth in 2014-2025, and 2026-2034[18] 2.18%, 1.82%
- Percentage of labour force employed in industrial industries[19] 30%
- Average gross Floor Space Ratio for new industrial development[20] 0.33

| | Projected Building Inventory (SF) | |
|---|---|---|
| | Based on Employment Growth | Based on 10 Year Historical Average |
| 2014 | 7,606,362 | 7,606,362 |
| 2015 | 7,960,036 | 7,728,064 |
| 2016 | 8,083,788 | 7,851,713 |
| 2017 | 8,221,886 | 7,977,340 |
| 2018 | 8,391,213 | 8,104,978 |
| 2019 | 8,585,980 | 8,234,657 |
| 2020 | 8,796,363 | 8,366,412 |
| 2021 | 8,973,824 | 8,500,274 |
| 2022 | 9,163,249 | 8,636,279 |
| 2023 | 9,364,080 | 8,774,459 |
| 2024 | 9,571,786 | 8,914,851 |
| 2025 | 9,782,133 | 9,057,488 |
| 2026 | 9,956,863 | 9,202,408 |
| 2027 | 10,137,291 | 9,349,647 |
| 2028 | 10,322,245 | 9,499,241 |
| 2029 | 10,510,447 | 9,651,229 |
| 2030 | 10,701,371 | 9,805,648 |
| 2031 | 10,895,336 | 9,962,539 |
| 2032 | 11,093,389 | 10,121,939 |
| 2033 | 11,295,168 | 10,283,890 |
| 2034 | 11,500,491 | 10,448,433 |
| | Land Requirements 2014-2034 (based on regional average 0.33 FSR): | |
| | 263 acres | 198 acres |

[17] 2011 National Household Survey
[18] Fraser Valley Regional District 2014 Regional Growth Strategy Employment Growth Estimates
[19] 2011 National Household Survey
[20] Colliers International



## Conclusion

| City in the Country Plan[21] | | Colliers Analysis[22] | |
|---|---|---|---|
| Vacant, Zoned Land | Land Needed | Vacant, Zoned Land | Land Needed |
| 29 acres | 1,300 acres | 155 acres | 198 - 263 acres |

**Figure 10** Vacant, Zoned Lands and Future Requirements

Even by the more conservative estimate which assumes demand going forward in the next 20 years will be similar to the past 10 years containing a recessionary period, Abbotsford's short and mid-term industrial land supply is not sufficient for accommodating expected growth. However, several opportunities remain for meeting the region's industrial growth needs:

- Rezoning and servicing land that has been excluded from the ALR and included in the City's OCP as industrial could provice an additional 620 acres.
- Incentivizing more intensive uses of parcels with a low floor space ratio could also supplement growth needs once availability of vacant potential parcels becomes scarce.
- Considering the exclusion of more land from the ALR if it has potential for significant strategic gain for the region, such as the West Abbotsford Business Park proposal.

[21] Based on a population of 195,000 upon residential build-out within current Urban Development Boundary
[22] Based on target population of 200,000, expected to be achieved in 2034

# Agri-Industrial Land Use

## Importance of a Coordinated Agri-Industrial Strategy

The City of Abbotsford Agriculture Strategy rightly identifies a need to retain and attract agri-industrial investment within the city limits, as a healthy and growing agri-industrial sector is critical to the growth and ongoing economic viability of Abbotsford's primary agricultural production sector. On-farm agri-industrial activity continues to grow in the City of Abbotsford, a trend which reflects farmers' need to remain competitive in an increasingly global market. This increased activity is encroaching on prime productive farmland and creating spillover costs to the City[23].

Historically, applications for exemptions from the ALC to permit more intensive farm-related industrial uses than are typically allowed under ALC regulations have been submitted and reviewed on a case-by-case basis. One of the primary objectives emerging from the Agriculture Strategy is to pursue a more strategic and collaborative approach with the ALC that promotes agri-industrial development while minimizing negative impacts on prime farmland.

In December 2012, a Rural Agri-Industrial Study was submitted to the City by Zbeetnoff Agro-Environmental Consulting, which suggested a more proactive approach to attracting and retaining agri-industrial activity and which recommended that a clustered rural agri-industrial development in a prime location away from prime agricultural land would be an effective strategy not only in protecting the productive farmland base, but also in mitigating or preventing the further erosion of agri-industrial businesses relocating to other municipalities. This study also recommended that the Fraser Highway Corridor for such a cluster due to its history of non-agricultural uses, degraded condition, and limited agricultural capability.

## Fraser Highway Corridor Agri-Industrial Study

Recognizing the importance of agriculture to the local economy, and in response to the Agricultural Land Commission's (ALC's) request that the City of Abbotsford develop a comprehensive land use planning strategy for agri-industrial uses specifically, Colliers International Consulting (hereafter CIC) was engaged by the City, in the Spring of 2014, to evaluate the economic viability of creating an agri-industrial zone along the Fraser Highway Corridor between Abbotsford and Aldergrove. In order to address the need for a more coordinated and efficient approach to actively accommodating agri-industrial land uses, CIC was asked specifically to investigate the viability of establishing an A-5 agri-industrial zone within the Fraser Highway Corridor study area, which consists of 93 land parcels totaling 231 hectares (roughly 572 acres) located between Mt. Lehman Road to the east and Lefeuvre Road to the west.

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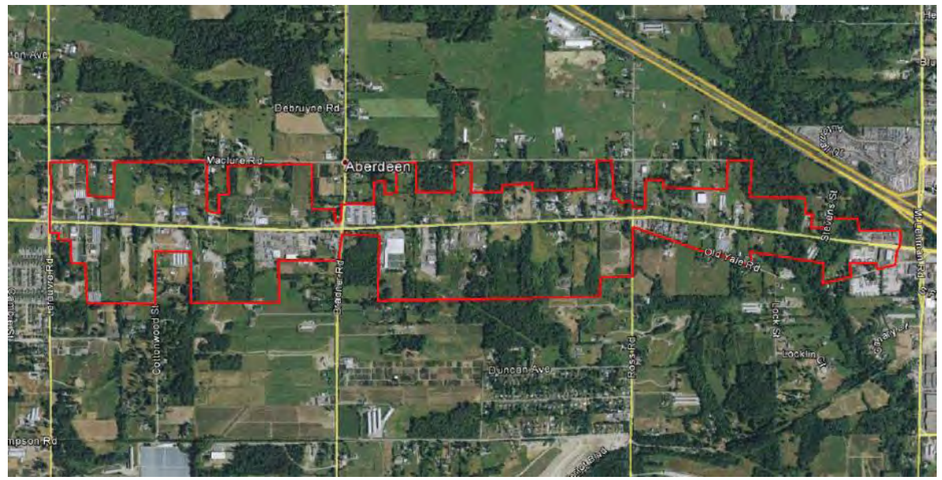
[23] Over the 2004-2013 period, A5 rezoning applications in the City of Abbotsford totaled 30 hectares (73 acres), or about 3.0 hectares (7.3 acres) per year.






CIC's investigation into the viability of establishing a dedicated A5 zone included the following components and considerations:

- Industrial market analysis, with a focus on Abbotsford industrial market activity and conditions relative other key competitive regional sub-markets such as Chilliwack and Maple Ridge-Pitt Meadows
- Review of historical A5 rezoning applications, both closed and approved since 2004
- Analysis of potential property tax generation based on actual Fraser Highway Corridor A5 rezoning applications and illustrative examples for other potential property conversions
- Review and market implications of Chilliwack's Kerr Avenue Business Park, an agri-industrial development example focused specifically on food processing and distribution

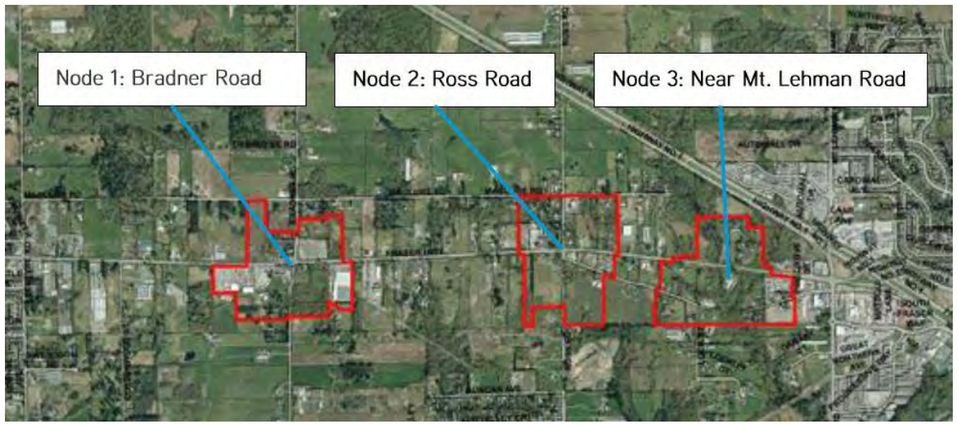
The results of CIC's analysis were presented in a June 12, 2014 report titled *Abbotsford Agri-Industrial – Market Viability Analysis* and are summarized below for ease of reference:

- There is not a justifiable business case, from either a market or fiscal perspective, for the City of Abbotsford to invest (roughly $32 million) in a major capacity and servicing improvement project along the length of the Fraser Highway Corridor study area for the purposes of providing a dedicated A5 cluster due to the following:
    - Low annual absorption forecast – Between 2004 and 2013, roughly 30 hectares (73 acres) of land in the City of Abbotsford was successfully rezoned to the A5 classification. This translates into about 3 hectares (7.3 acres) of related absorption per year. Even if both successful and closed A5 rezoning applications were assumed to represent total potential demand, this annual absorption figure would increase to only 5.5 hectares (13.6 acres). At this rate, the study area would require 40 to 75+ years to absorb.

- Not all potential future A5 user groups are likely to be optimal in terms of property tax generation. The implications of this are that relatively low intensity uses are likely to perpetuate, significantly limiting the potential to finance desired roadway improvements with incremental property tax generation.
- The wide variety of parcel sizes and configurations within the Fraser Highway Corridor study area (particularly with respect to site depths north and south of the Fraser Highway) makes a comprehensive A5 agri-business cluster a challenging proposition. These challenges are compounded by existing traffic capacity issues, as further redevelopment would only exacerbate the problem.
- Competitive supply of affordable industrial land, which offers more market liquidity due to its wide variety of potential, will tend to attract interest from higher intensity agri-industrial user groups concerned about investing in A5 land with a narrower audience.

- Despite the lack of a justifiable business case for pursuing a comprehensive A5 cluster within the Fraser Highway Corridor study area, CIC nevertheless sees significant economic value in pursuing a more modestly-scaled dedicated A5 cluster of about 35 to 40 hectares (90 to 100 acres), which could potentially be absorbed in a more reasonable time frame of 10 to 15 years, depending on market conditions.

Based upon CIC's recommendation that the potential for a smaller A5 cluster be explored, City planning and engineering staff then investigated three potential areas within the larger Fraser Highway Corridor study area in order to gauge general A5 viability and to determine associated servicing cost implications. It was concluded that the three areas presented challenges relating to servicing costs, traffic impacts, environmental and topographical constraints, and land use compatibility.






## Next Steps

Following receipt and review of CIC's June 2014 *Abbotsford Agri-Industrial Market Viability Analysis* report, it was decided by Council not to pursue exploration of a potential A5 agri-industrial cluster within the defined Fraser Highway Corridor study area. It was also decided that an alternative location or locations be explored and assessed (for market and financial viability) by CIC as part of the ongoing Abbotsford OCP Update process – with a focus on Colliers' recommended A5 cluster size of between 50 and 100 acres. Colliers International Consulting will be working with the City in exploring this agri-industrial cluster potential as the OCP Update process evolves. Key criteria to be considered in evaluating the potential for a more modest agri-industrial cluster representing perhaps 10 to 15 years' worth of supply include:

- Agricultural capability/quality
- Servicing costs
- Land use compatibility
- Lot configuration
- Environmental and topographical constraints
- Traffic impacts
- Market demand

# Institutional Analysis and Forecast

## Institutional Land Uses

Healthy, balanced city growth, measured in large part by the well-being of its residents, requires the availability of a diverse range of quality community services and facilities. Beyond addressing basic social needs, these services and facilities help a city's residents to take pride and ownership of their respective communities.

With a population expected to grow from an estimated 140,000 residents in 2014 to 200,000 residents by 2035 (based on a medium growth assumption of 1.7% per year), the City of Abbotsford can now, through the OCP Update process, consider how best to meet the ongoing needs of both its built-out and growing communities.

**City of Abbotsford**
**Forecast Community Population Growth Based on Trend***

| | Current Estimate | Forecast | |
|---|---|---|---|
| **Neighbourhood/Area** | **2014** | **City Population of 200,000**** | **Increase From 2014** |
| Abbotsford Centre | 8,710 | 15,200 | 6,490 |
| Aberdeen | 6,305 | 7,900 | 1,595 |
| Babich | 5,230 | 8,000 | 2,770 |
| Bradner-Mt. Lehman | 3,950 | 4,100 | 150 |
| Clearbrook Centre | 12,750 | 23,200 | 10,450 |
| East Townline | 11,465 | 12,100 | 635 |
| Fairfield | 9,075 | 9,700 | 625 |
| Matsqui Prairie | 2,130 | 2,200 | 70 |
| McMillan | 8,040 | 10,900 | 2,860 |
| Mill Lake | 8,750 | 16,200 | 7,450 |
| Old Clayburn | 17,325 | 22,500 | 5,175 |
| South Clearbrook | 7,800 | 10,100 | 2,300 |
| South Poplar | 8,080 | 13,000 | 4,920 |
| Sumas Mountain | 4,250 | 13,600 | 9,350 |
| Sumas Prairie | 3,460 | 3,500 | 40 |
| West Clearbrook | 6,010 | 7,000 | 990 |
| West Townline | 10,410 | 12,800 | 2,390 |
| Whatcom | 6,260 | 8,000 | 1,740 |
| **City of Abbotsford Total** | **140,000** | **200,000** | |

Source: BC Stats undercount estimates
* To be adjusted following a review of development capacity by community.
** Expected to be reached by 2035 in a medium growth scenario of 1.7% per year.



With a clearer understanding of anticipated growth by community, which will require a more in-depth review of current development capacity on a community by community basis, the City of Abbotsford can effectively plan how to best to meet increased demand for:

- Fire Protection (i.e. fire halls and training centres)
- Police and Public Safety (current Abbotsford Police Headquarters at 2838 Justice Way, Community Policing Office at 34194 Marshall Road)
- Recreation and Cultural Facilities, including
    - Neighbourhood and Community Facilities (i.e. playing fields, tennis courts, youth centres, fitness circuits, playgrounds, indoor program facilities)
    - City and Regional Facilities (i.e. larger parks and facilities intended to serve the City of Abbotsford – opportunities to tie OCP Update to the city's Parks and Recreation Master Plan)
- Public School Facilities (i.e. Abbotsford School District – School District 34)
- Library Services (Fraser Valley Regional Library, Abbotsford Community Library)
- Health Services (e.g. Abbotsford Regional Hospital and Cancer Centre)
- Religious Facilities (various)

Planning for increased demand in these community service and facility categories is a function of population growth, land use patterns and accessibility, and an evaluation of current operational/service capacity. There are, for example, currently 8 Fire Halls servicing the City of Abbotsford from the communities of Clearbrook (No. 1), Sumas Prairie (No. 2), Aberdeen (No. 3), Matsqui Village (No. 4), Mt. Lehman (No. 5), Abbotsford (No. 6), Sandy Hill (No. 7) and a new Fire Hall No. 8 on Blueridge Drive. Though a population threshold of 200,000 residents equates to 42% growth over the current 2014 population, a thorough examination of current fire hall service capacity will be required to determine the extent to which new fire hall facilities will be required, and in what locations they will best meet anticipated demand.

Often, as in the case of a school district's long range facilities planning process, determination of future facility demand requires a detailed analysis of enrolment, capacity and condition by school, review of operational finances, and a clear understanding of population growth by community, demographic trends (particularly age profile) and a benchmarking review of school design precedents. CIC worked directly with Richmond School District 38 on its Long Range Facilities Plan in 2012, a process which included a detailed school by school forecast of enrolment over a roughly 30-year time horizon and made strategic recommendations re: optimizing current capacity, eliminating under-performing facilities, and forecasting need for new facilities.

# Appendix A - Abbotsford Community Profiles

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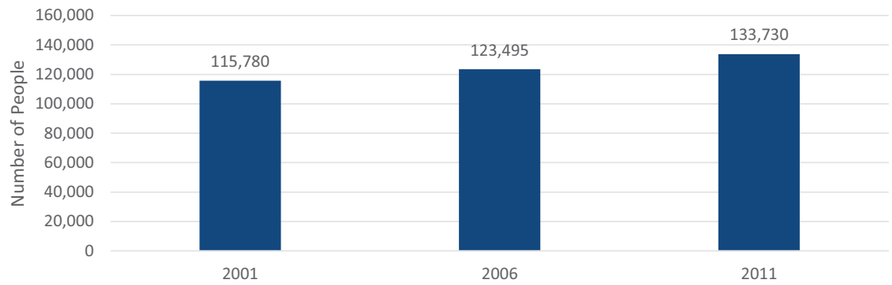
City of Abbotsford Profile

## City of Abbotsford

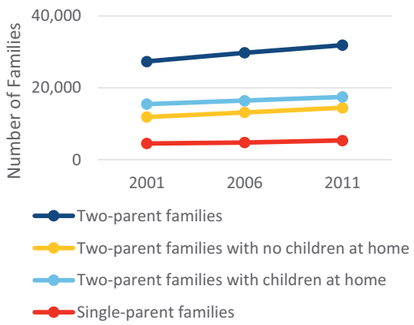
### Population Growth 2001-2011



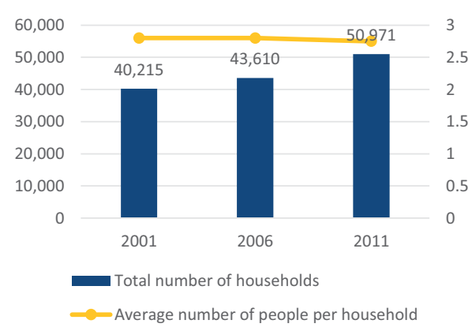

### Age Profile

| | 2011 census | 2035 projection |
|---|---|---|
| 0 to 4 years | 8,595 | 11,313 |
| 5 to 19 years | 26,280 | 31,700 |
| 20 to 24 years | 9,235 | 14,554 |
| 25 to 34 years | 17,990 | 29,017 |
| 35 to 44 years | 17,635 | 24,189 |
| 45 to 54 years | 18,655 | 24,546 |
| 55 to 64 years | 15,645 | 24,272 |
| 65 to 74 years | 10,205 | 19,279 |
| 75 years and over | 9,590 | 21,130 |
| **Total Population** | **133,730** | **200,000** |

### Family Structure

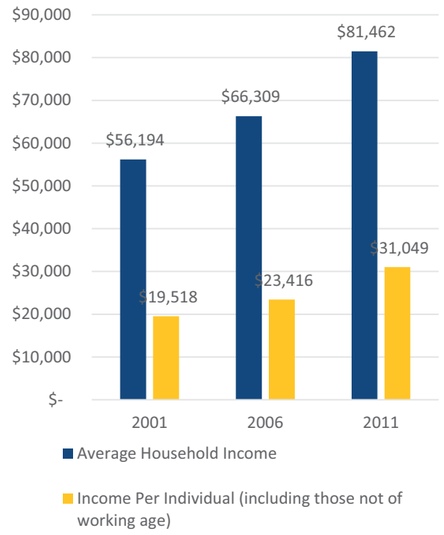



### Household Profile

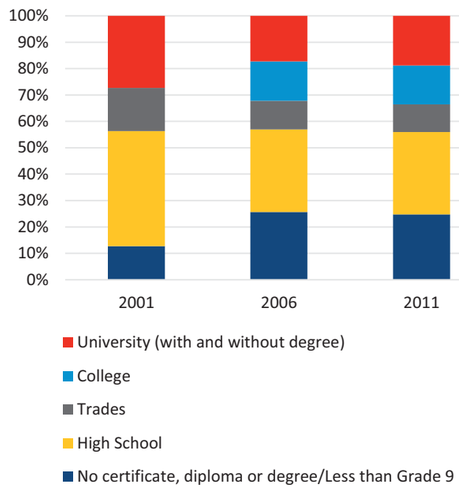



Dominant Household Type was 2 person from 2001-2011.

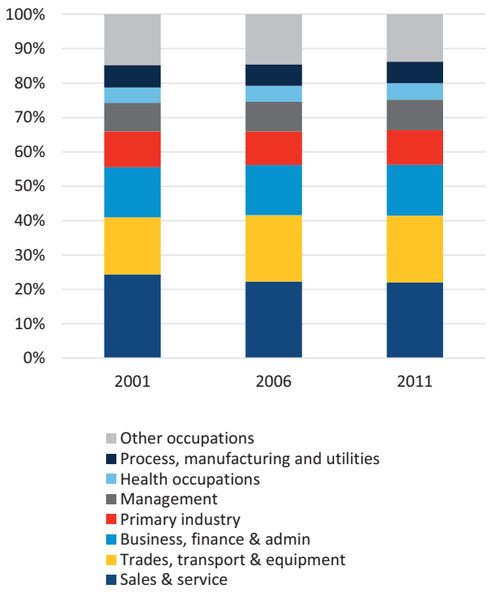
## Income Profile



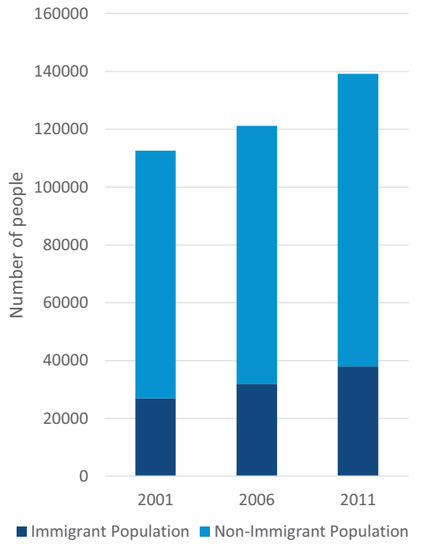

## Highest Level of Educational Attainment




## Labour Force by Occupation




## Immigrant Population

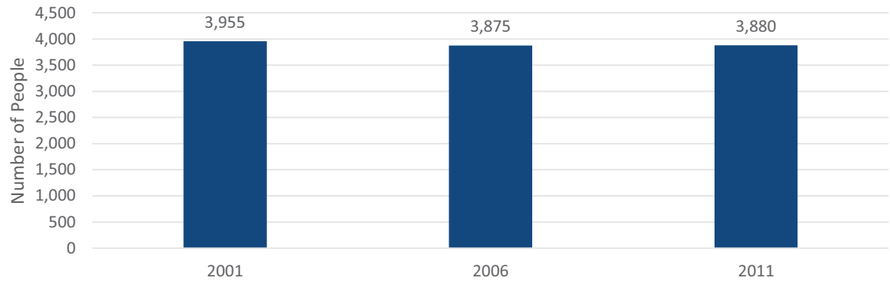







# 1. Bradner-Mt. Lehman

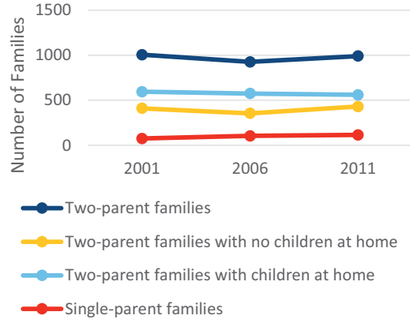
## Population Growth 2001-2011



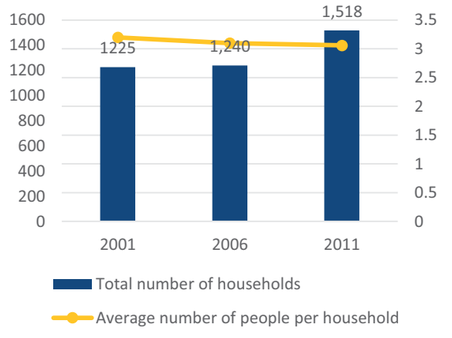

## Age Profile

| | 2011 census | 2035 projection |
|---|---|---|
| 0 to 4 years | 220 | 226 |
| 5 to 19 years | 855 | 807 |
| 20 to 24 years | 250 | 332 |
| 25 to 34 years | 340 | 479 |
| 35 to 44 years | 495 | 485 |
| 45 to 54 years | 615 | 601 |
| 55 to 64 years | 530 | 575 |
| 65 to 74 years | 360 | 392 |
| 75 years and over | 180 | 203 |
| **Total Population** | 3,880 | 4,100 |

## Family Structure

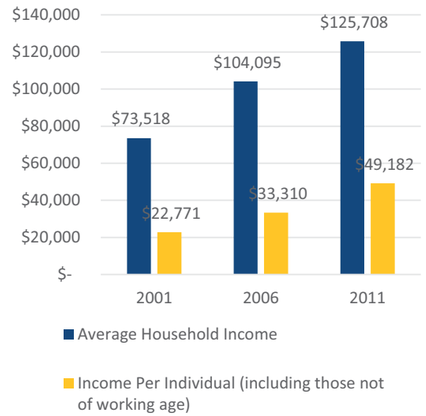



## Household Profile

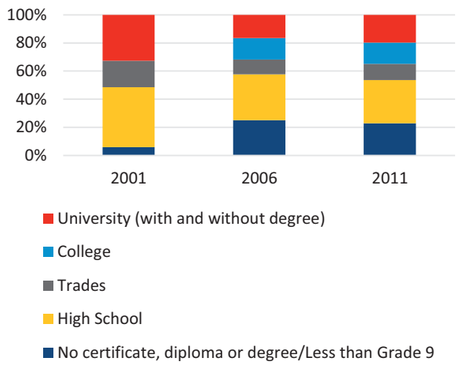



Dominant Household Type was 2 person from 2001-2011.

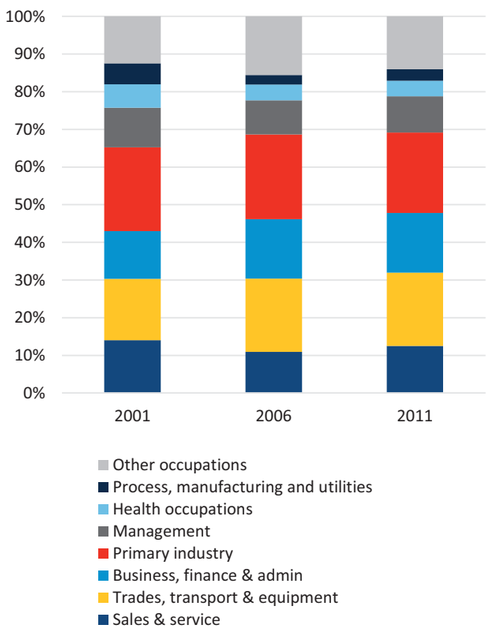
## Income Profile



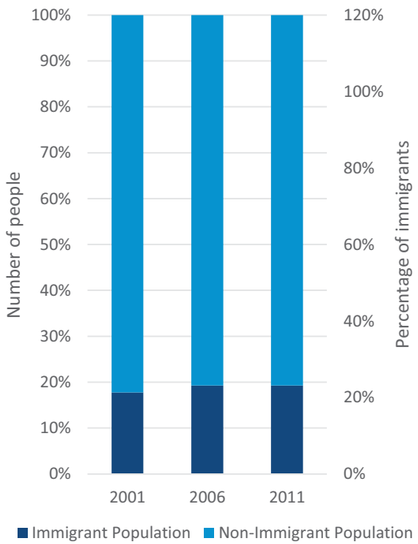

## Highest Level of Educational Attainment




## Labour Force by Occupation




## Immigrant Population

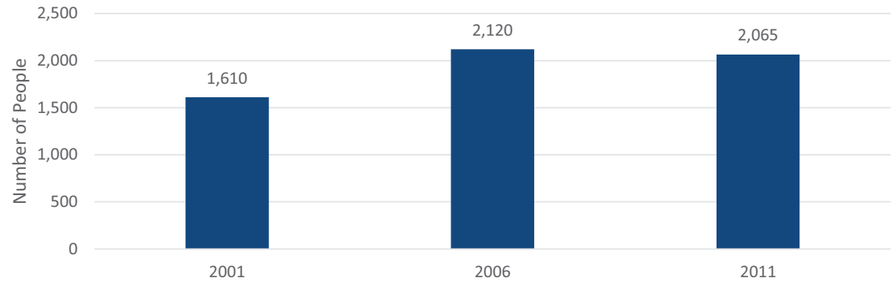







# 2. Matsqui Prairie

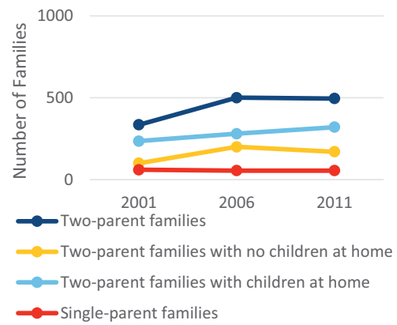
## Population Growth 2001-2011



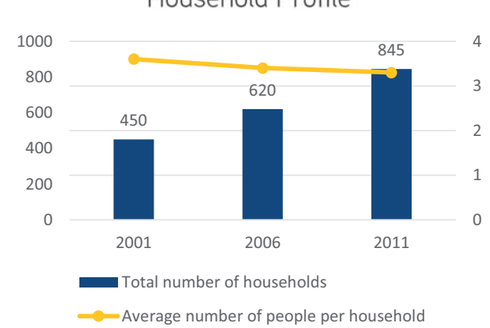

## Age Profile

| | 2011 census | 2035 projection |
|---|---|---|
| 0 to 4 years | 145 | 143 |
| 5 to 19 years | 515 | 489 |
| 20 to 24 years | 175 | 216 |
| 25 to 34 years | 235 | 313 |
| 35 to 44 years | 265 | 263 |
| 45 to 54 years | 330 | 330 |
| 55 to 64 years | 225 | 242 |
| 65 to 74 years | 105 | 125 |
| 75 years and over | 70 | 80 |
| **Total Population** | **2,065** | **2,200** |

## Family Structure

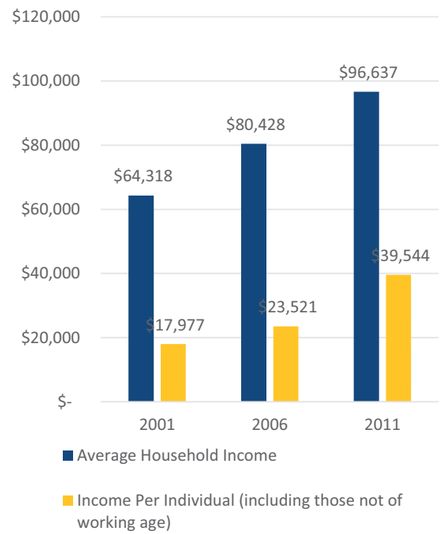



## Household Profile

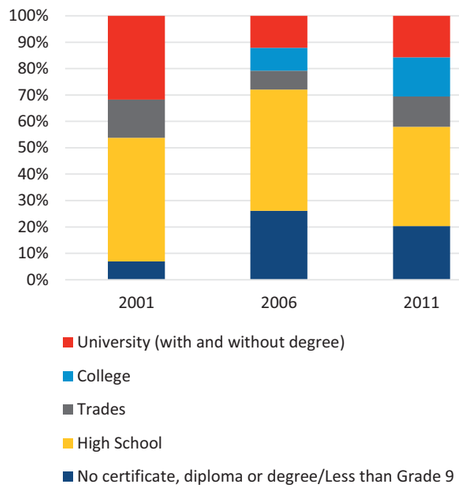



Dominant Household Type was 4 or 5 person from 2001-2011.

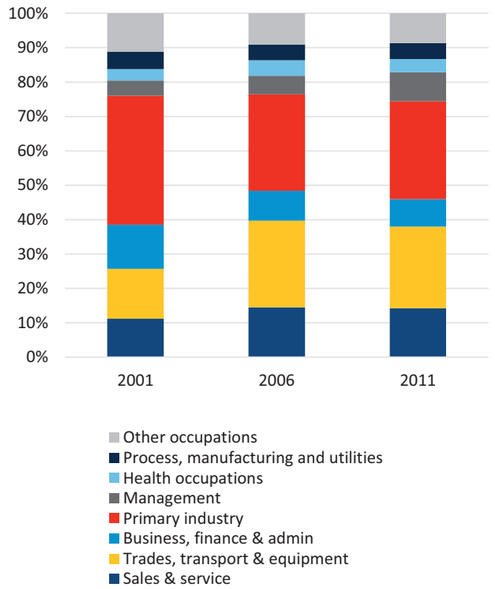
## Income Profile



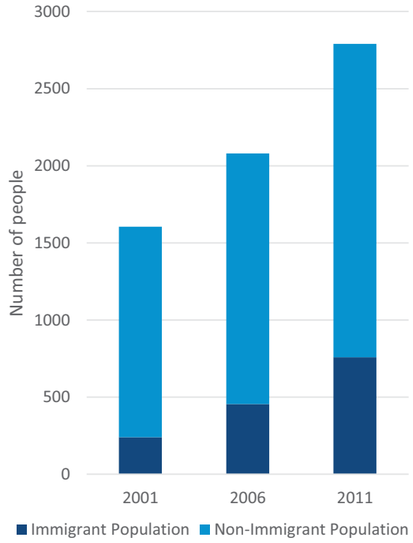

## Highest Level of Educational Attainment




## Labour Force by Occupation




## Immigrant Population

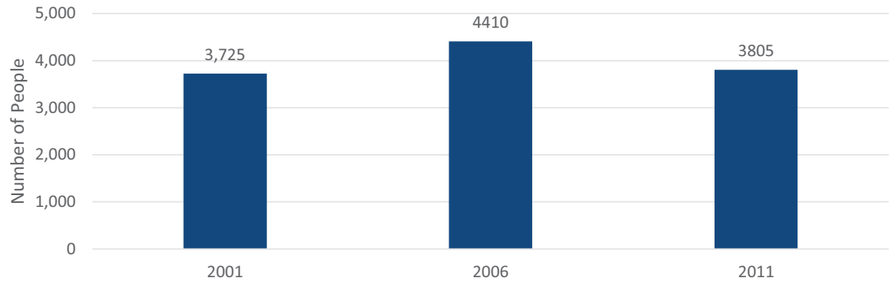







# 3. Sumas Mountain

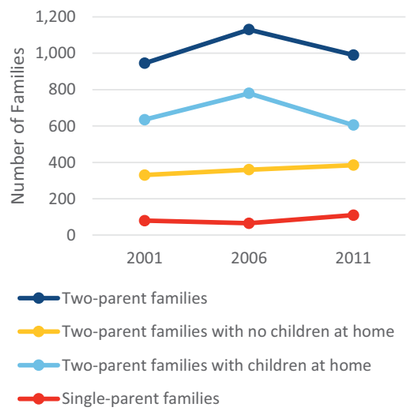
## Population Growth 2001-2011



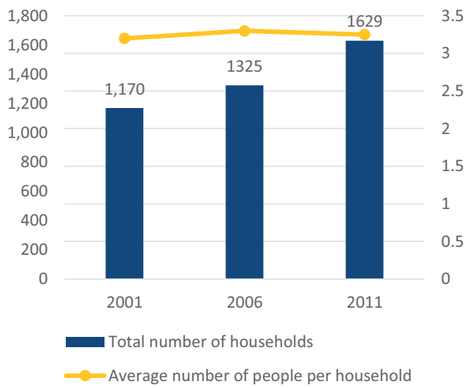

## Age Profile

| | 2011 census | 2035 projection |
|---|---|---|
| 0 to 4 years | 285 | 696 |
| 5 to 19 years | 1,025 | 1,873 |
| 20 to 24 years | 200 | 915 |
| 25 to 34 years | 385 | 1,815 |
| 35 to 44 years | 705 | 1,618 |
| 45 to 54 years | 555 | 1,590 |
| 55 to 64 years | 405 | 1,695 |
| 65 to 74 years | 165 | 1,476 |
| 75 years and over | 75 | 1,922 |
| **Total Population** | **3,805** | **13,600** |

## Family Structure

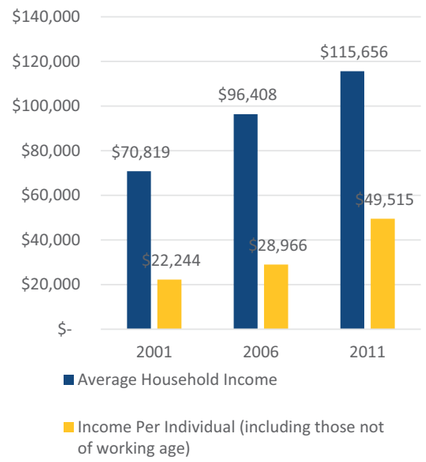



## Household Profile

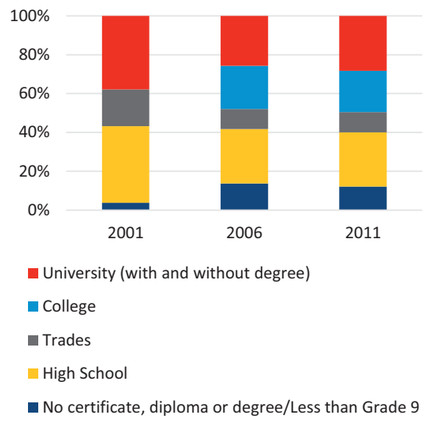



Dominant Household Type was 4 or 5 person from 2001-2011.

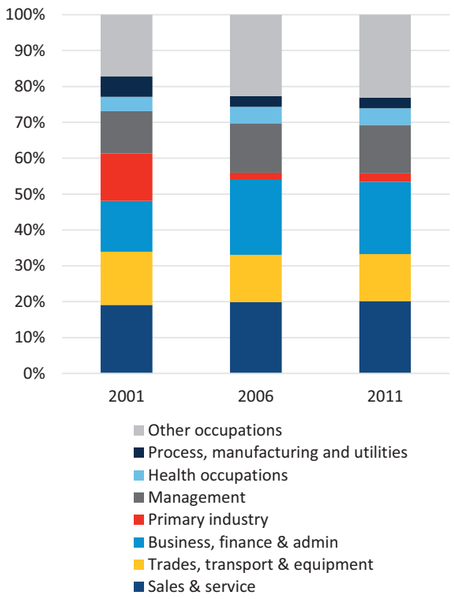
## Income Profile



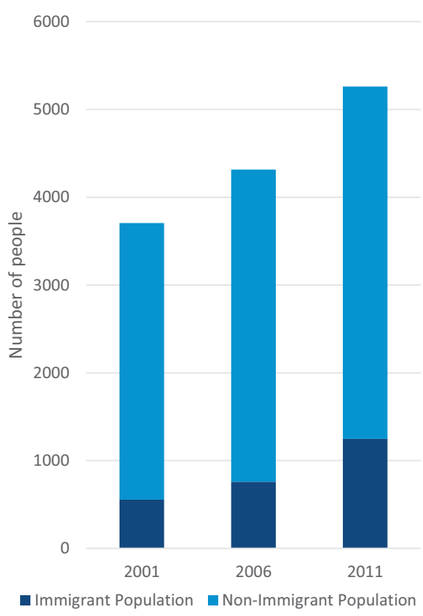

## Highest Level of Educational Attainment




## Labour Force by Occupation




## Immigrant Population

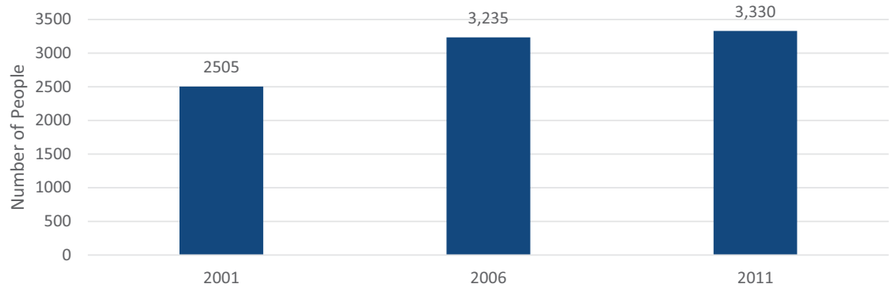







# 4. Sumas Prairie

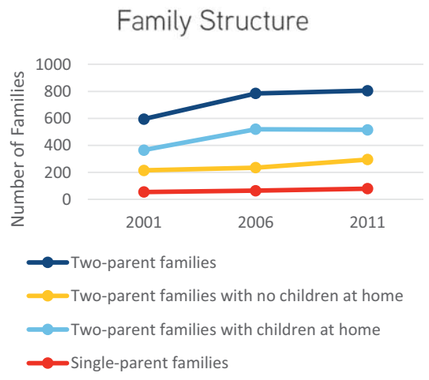
## Population Growth 2001-2011



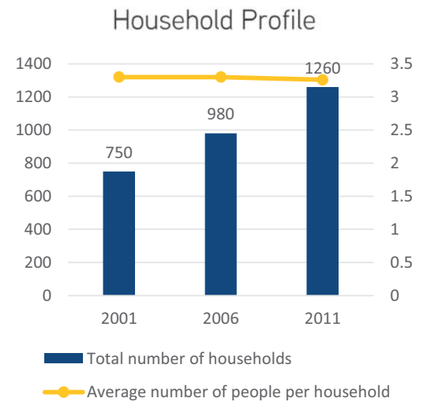

## Age Profile

| | 2011 census | 2035 projection |
|---|---|---|
| 0 to 4 years | 240 | 241 |
| 5 to 19 years | 805 | 781 |
| 20 to 24 years | 260 | 321 |
| 25 to 34 years | 365 | 480 |
| 35 to 44 years | 430 | 408 |
| 45 to 54 years | 560 | 545 |
| 55 to 64 years | 315 | 387 |
| 65 to 74 years | 210 | 209 |
| 75 years and over | 110 | 129 |
| **Total Population** | **3,330** | **3,500** |

## Family Structure

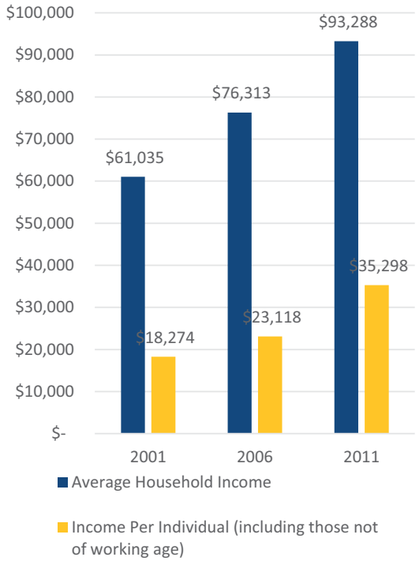



## Household Profile

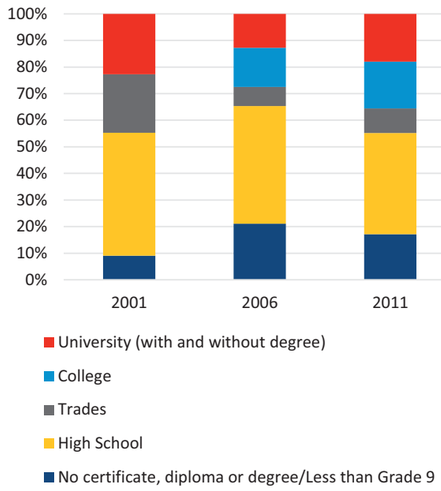



Dominant Household Type was 4 or 5 person from 2001-2011.

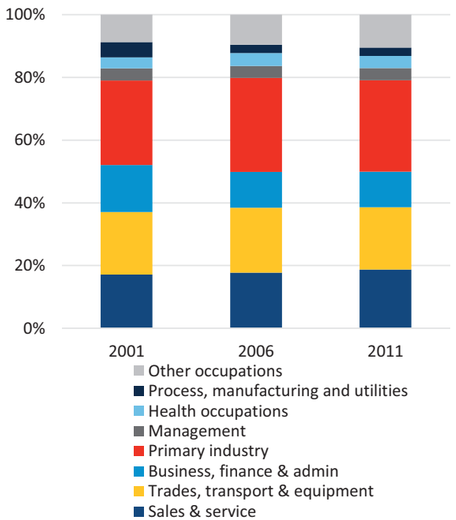
## Income Profile



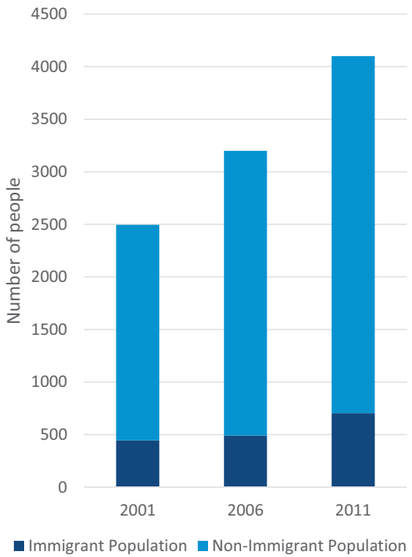

## Highest Level of Educational Attainment




## Labour Force by Occupation




## Immigrant Population

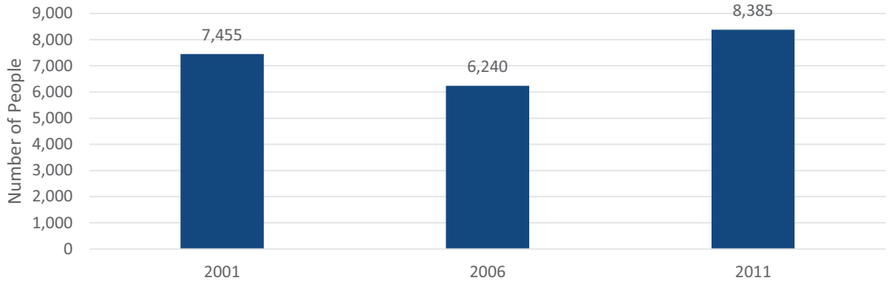







# 5. South Poplar

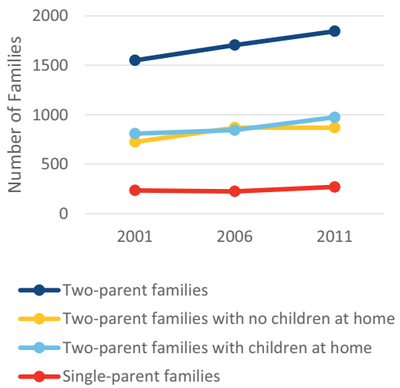
## Population Growth 2001-2011



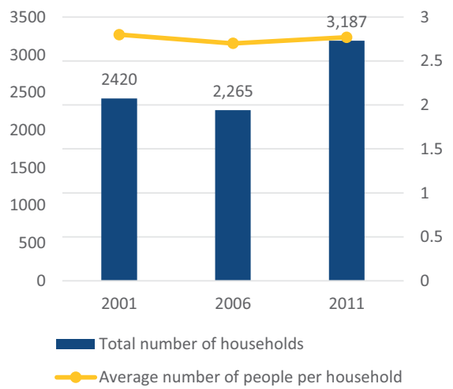

## Age Profile

| | 2011 census | 2035 projection |
|---|---|---|
| 0 to 4 years | 435 | 671 |
| 5 to 19 years | 1,400 | 1,851 |
| 20 to 24 years | 690 | 968 |
| 25 to 34 years | 1335 | 2,138 |
| 35 to 44 years | 1180 | 1,714 |
| 45 to 54 years | 1180 | 1,630 |
| 55 to 64 years | 905 | 1,507 |
| 65 to 74 years | 675 | 1,226 |
| 75 years and over | 565 | 1,296 |
| **Total Population** | **8,385** | **13,000** |

## Family Structure

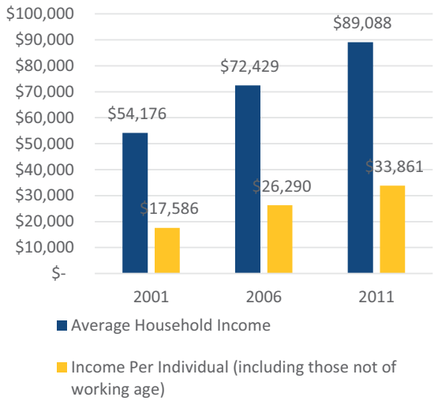



## Household Profile

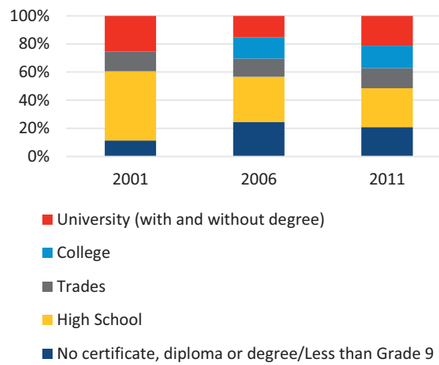



Dominant Household Type was 2 person from 2001-2011.

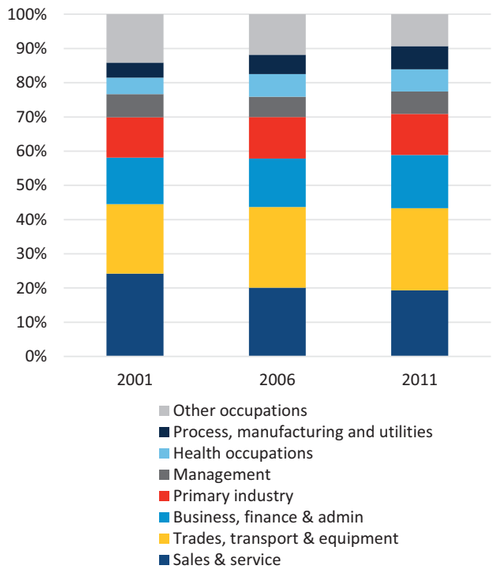
## Income Profile



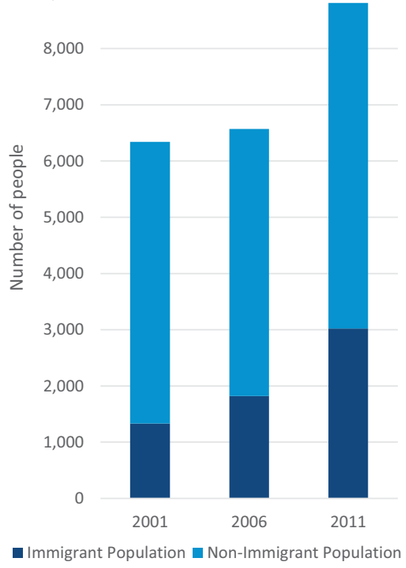

## Highest Level of Educational Attainment




## Labour Force by Occupation




## Immigrant Population

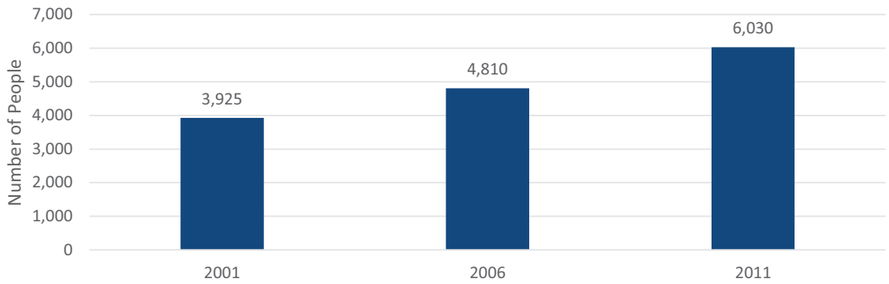







# 6. Aberdeen

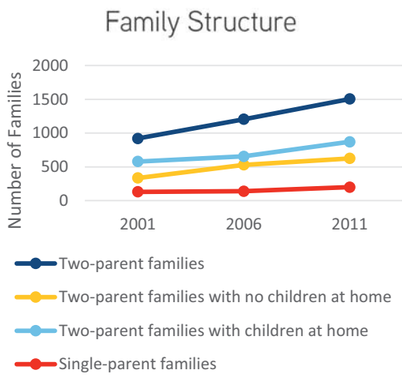
## Population Growth 2001-2011



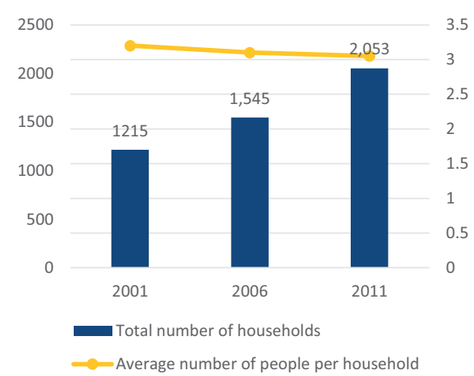

## Age Profile

| | 2011 census | 2035 projection |
|---|---|---|
| 0 to 4 years | 380 | 459 |
| 5 to 19 years | 1,295 | 1,440 |
| 20 to 24 years | 400 | 607 |
| 25 to 34 years | 715 | 1,072 |
| 35 to 44 years | 840 | 1,008 |
| 45 to 54 years | 960 | 1,099 |
| 55 to 64 years | 700 | 975 |
| 65 to 74 years | 445 | 693 |
| 75 years and over | 265 | 546 |
| **Total Population** | **6,030** | **7,900** |

## Family Structure

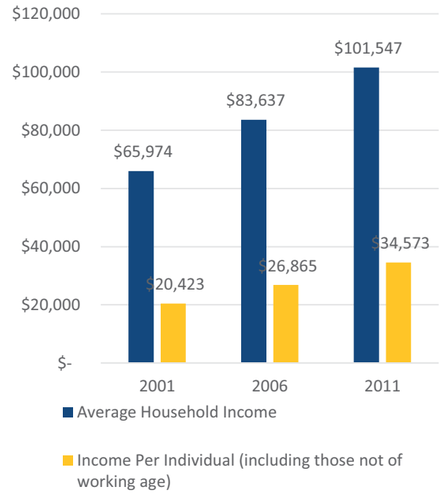



## Household Profile

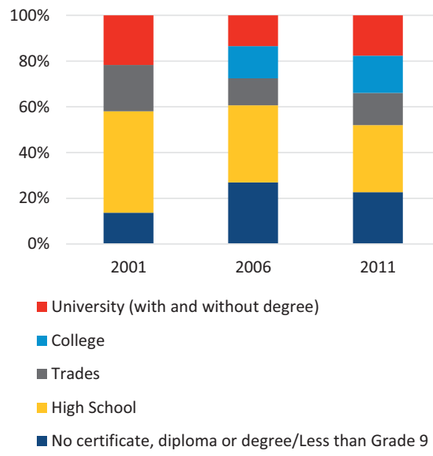



Dominant Household Type was 2 person from 2001-2011.

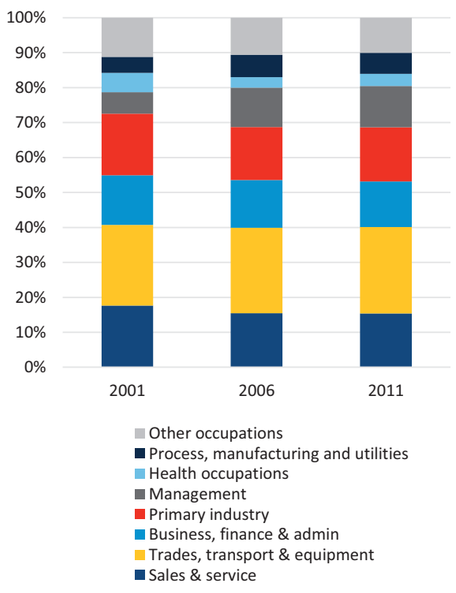
## Income Profile



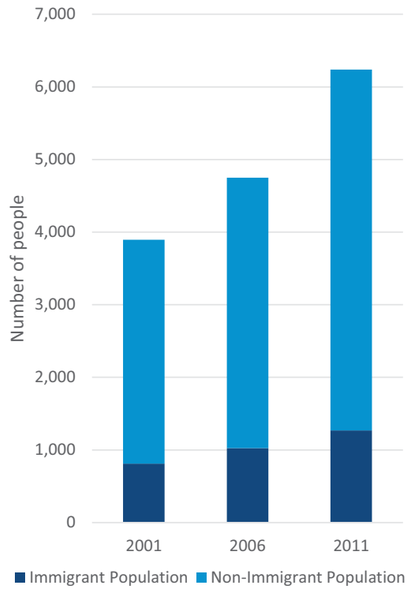

## Highest Level of Educational Attainment




## Labour Force by Occupation




## Immigrant Population

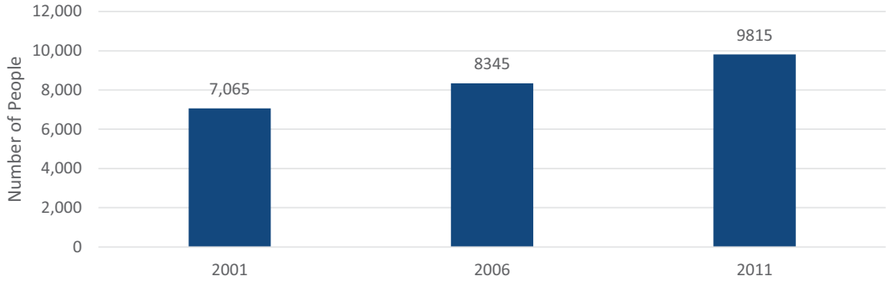







# 7. West Townline

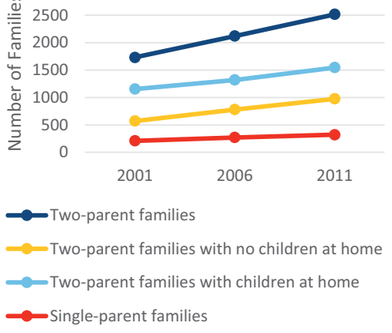
## Population Growth 2001-2011



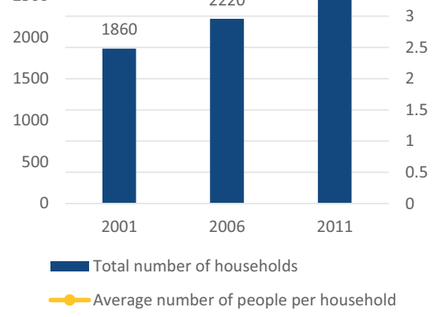

## Age Profile

| | 2011 census | 2035 projection |
|---|---|---|
| 0 to 4 years | 805 | 955 |
| 5 to 19 years | 2,080 | 2,477 |
| 20 to 24 years | 645 | 899 |
| 25 to 34 years | 1,790 | 2,163 |
| 35 to 44 years | 1,330 | 1,832 |
| 45 to 54 years | 1,025 | 1,339 |
| 55 to 64 years | 1,120 | 1,350 |
| 65 to 74 years | 650 | 1,047 |
| 75 years and over | 360 | 738 |
| **Total Population** | **9,815** | **12,800** |

## Family Structure

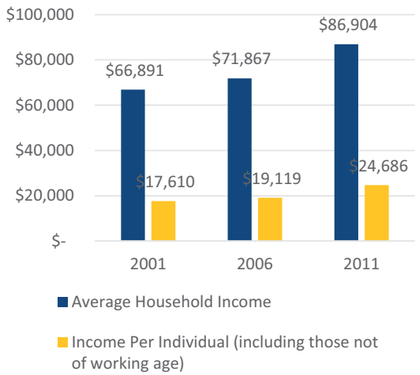



## Household Profile

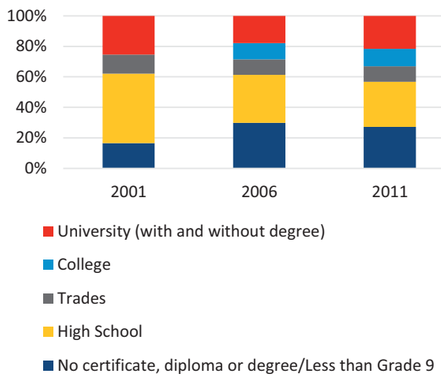



Dominant Household Type was 2 person from 2001-2014.

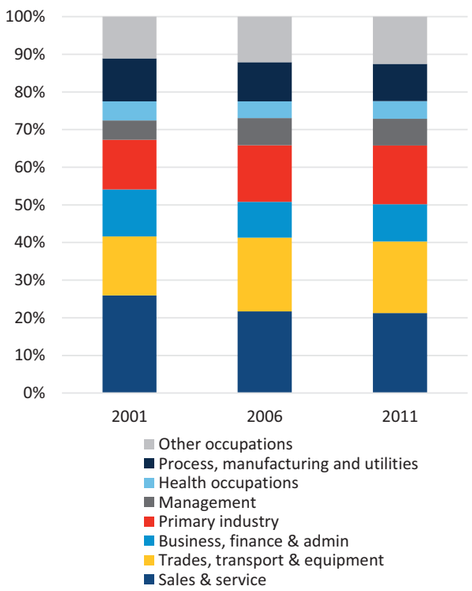
## Income Profile



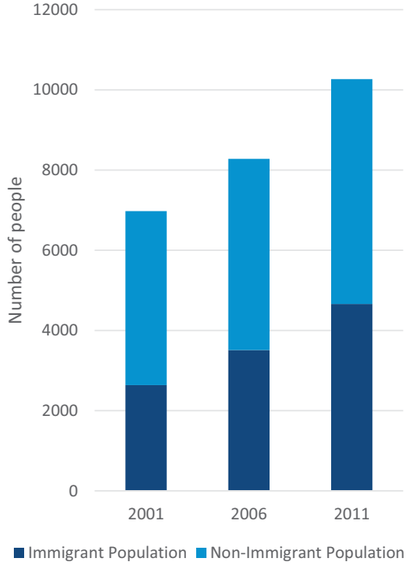

## Highest Level of Educational Attainment




## Labour Force by Occupation




## Immigrant Population

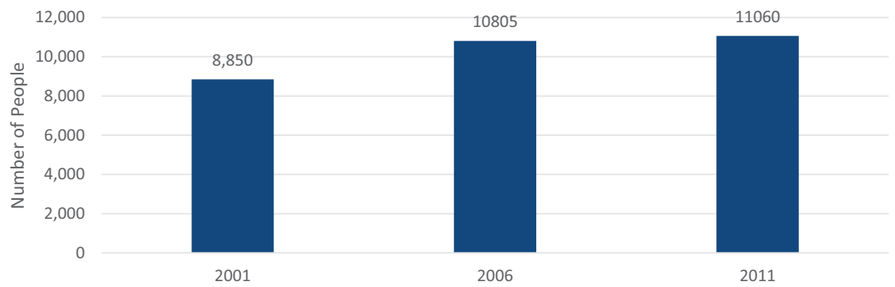







# 8. East Townline

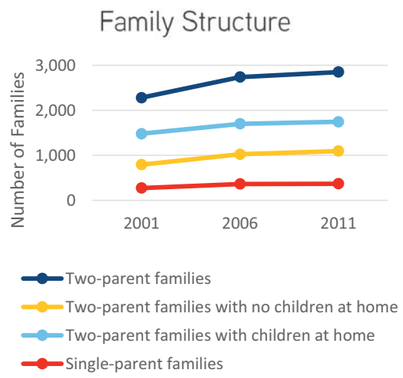
## Population Growth 2001-2011



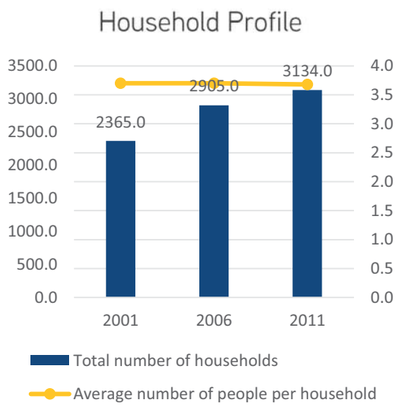

## Age Profile

| | 2011 census | 2035 projection |
|---|---|---|
| 0 to 4 years | 835 | 896 |
| 5 to 19 years | 2,375 | 2,533 |
| 20 to 24 years | 700 | 879 |
| 25 to 34 years | 1,815 | 1,966 |
| 35 to 44 years | 1,505 | 1,742 |
| 45 to 54 years | 1,210 | 1,306 |
| 55 to 64 years | 1,195 | 1,206 |
| 65 to 74 years | 905 | 996 |
| 75 years and over | 490 | 576 |
| **Total Population** | **11,060** | **12,100** |

## Family Structure

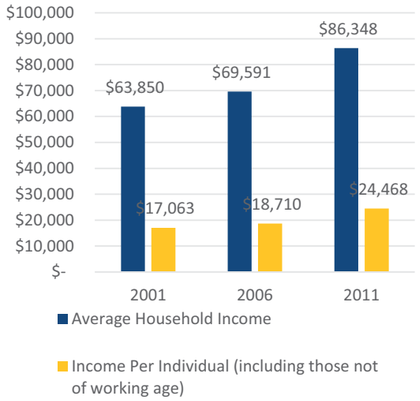



## Household Profile

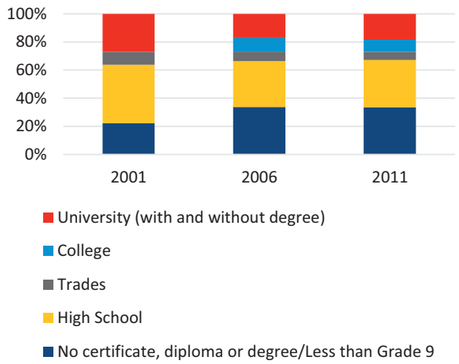



Dominant Household Type was 2 person in 2001, 4 or 5 person from 2006-2011.

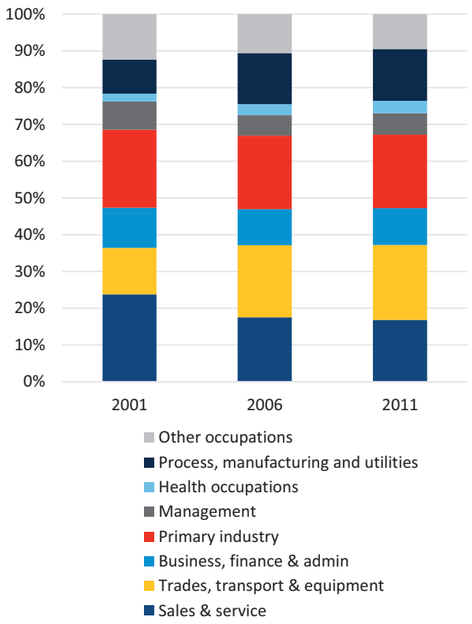
## Income Profile



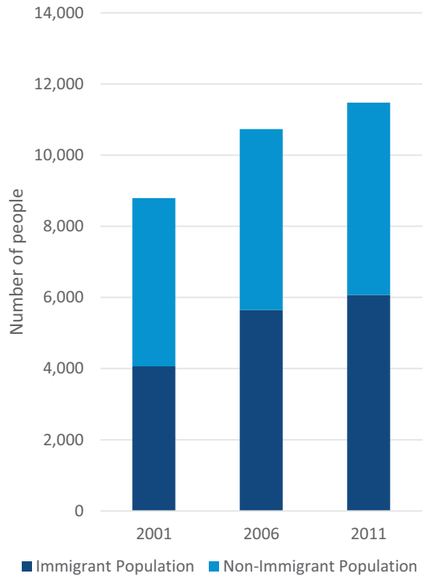

## Highest Level of Educational Attainment




## Labour Force by Occupation




## Immigrant Population

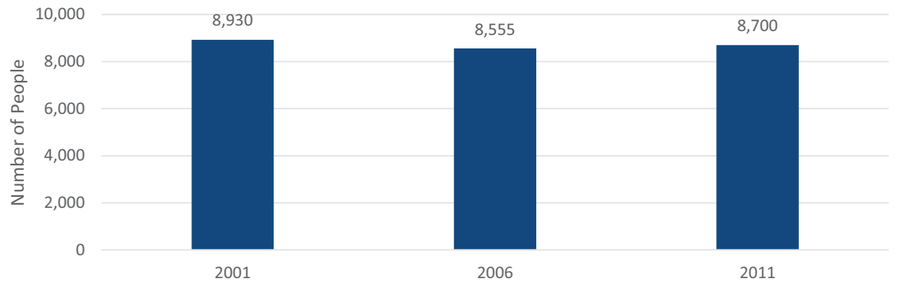







# 9. Fairfield

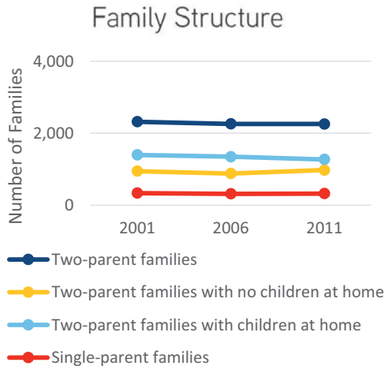
## Population Growth 2001-2011



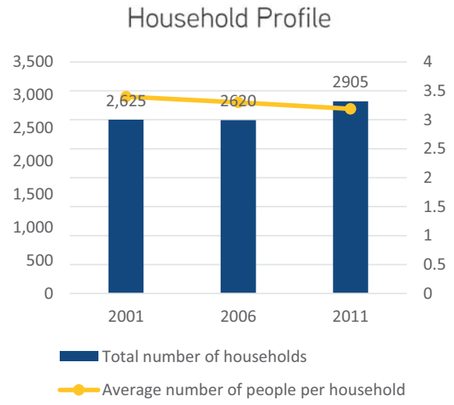

## Age Profile

| | 2011 census | 2035 projection |
|---|---|---|
| 0 to 4 years | 565 | 621 |
| 5 to 19 years | 1,840 | 1,900 |
| 20 to 24 years | 550 | 714 |
| 25 to 34 years | 1,150 | 1,366 |
| 35 to 44 years | 1,040 | 1,157 |
| 45 to 54 years | 1,245 | 1,242 |
| 55 to 64 years | 1,100 | 1,218 |
| 65 to 74 years | 765 | 883 |
| 75 years and over | 470 | 600 |
| **Total Population** | 8,700 | 9,700 |

## Family Structure

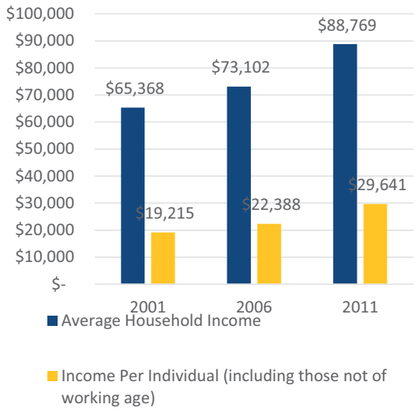



## Household Profile

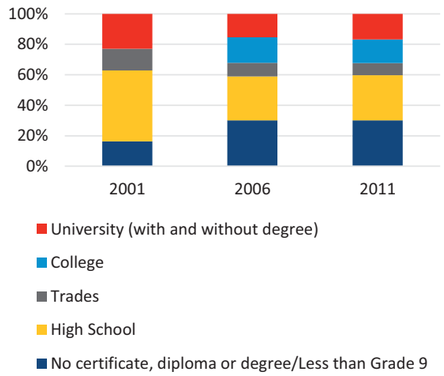



Dominant Household Type was 2 person from 2001-2011.

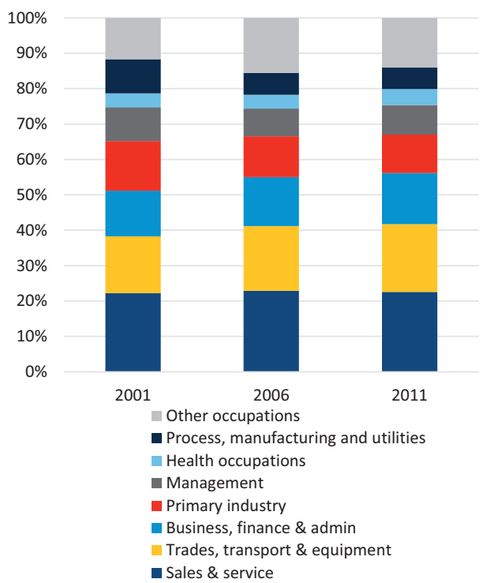
## Income Profile



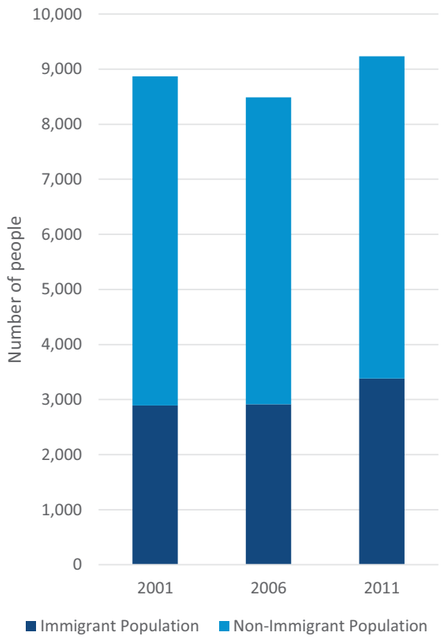

## Highest Level of Educational Attainment




## Labour Force by Occupation




## Immigrant Population

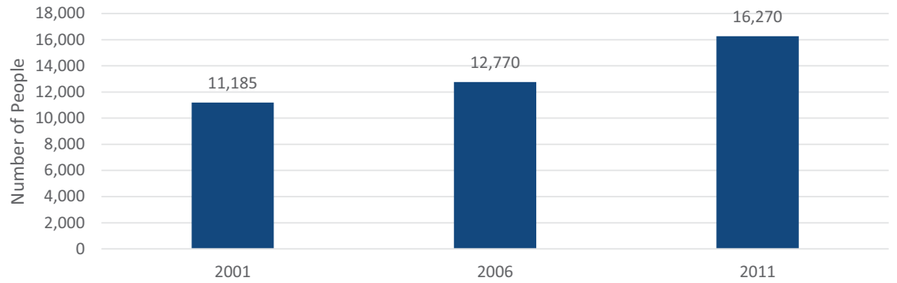







# 10. Old Clayburn

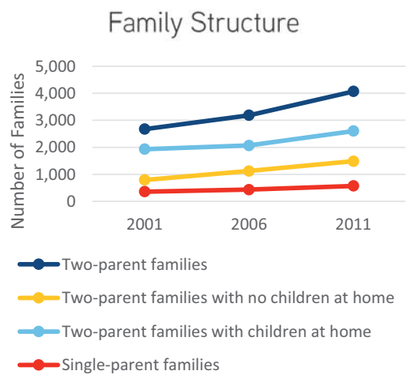
## Population Growth 2001-2011



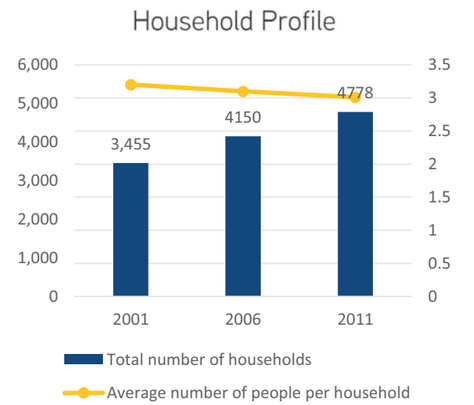

## Age Profile

| | 2011 census | 2035 projection |
|---|---|---|
| 0 to 4 years | 1,065 | 1,304 |
| 5 to 19 years | 4,015 | 4,279 |
| 20 to 24 years | 1,090 | 1,808 |
| 25 to 34 years | 1,790 | 2,939 |
| 35 to 44 years | 2,460 | 2,811 |
| 45 to 54 years | 2,770 | 3,260 |
| 55 to 64 years | 1,790 | 2,772 |
| 65 to 74 years | 785 | 1,727 |
| 75 years and over | 515 | 1,598 |
| **Total Population** | **16,270** | **22,500** |

## Family Structure

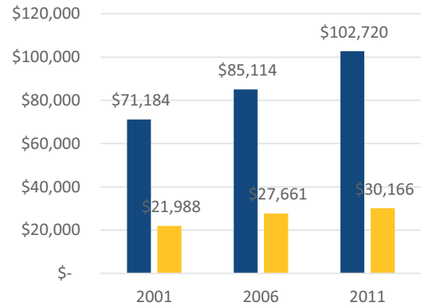



## Household Profile

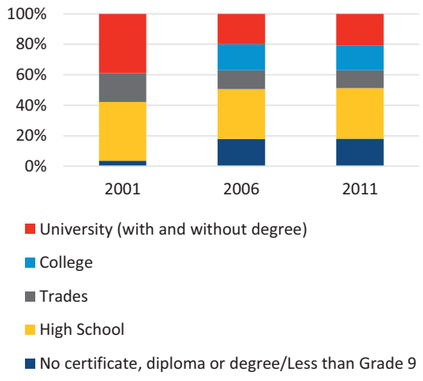



Dominant Household Type was 4 or 5 person from 2001-2011.

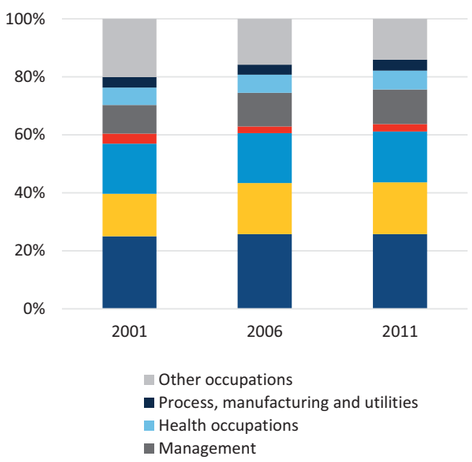
## Income Profile



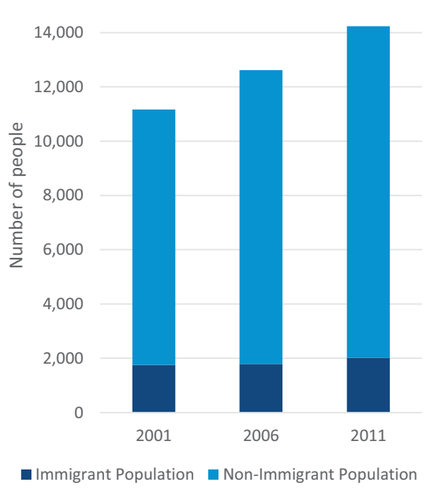

## Highest Level of Educational Attainment




## Labour Force by Occupation




## Immigrant Population

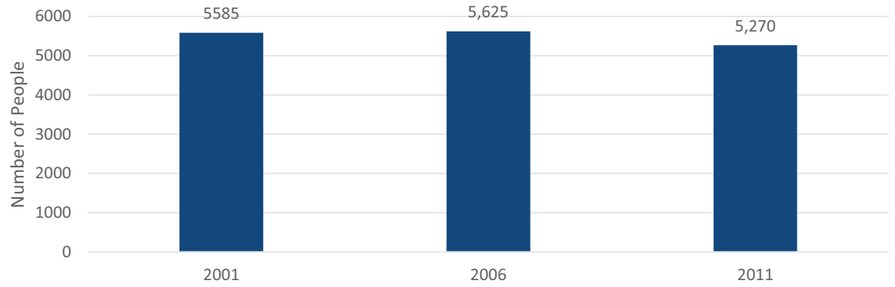







# 11. West Clearbrook

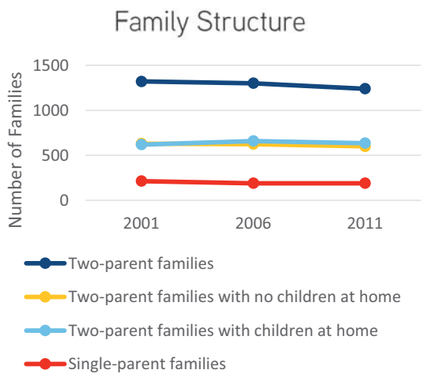
## Population Growth 2001-2011



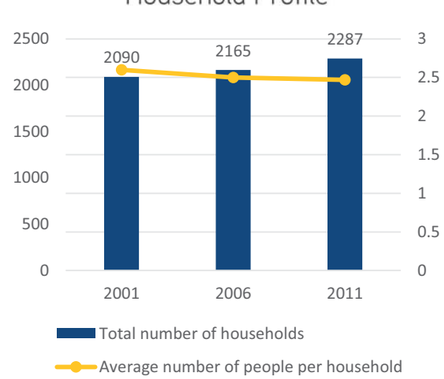

## Age Profile

| | 2011 census | 2035 projection |
|---|---|---|
| 0 to 4 years | 360 | 422 |
| 5 to 19 years | 925 | 1,112 |
| 20 to 24 years | 330 | 479 |
| 25 to 34 years | 715 | 999 |
| 35 to 44 years | 615 | 806 |
| 45 to 54 years | 635 | 809 |
| 55 to 64 years | 585 | 793 |
| 65 to 74 years | 465 | 688 |
| 75 years and over | 610 | 892 |
| **Total Population** | **5,270** | **7,000** |

## Family Structure

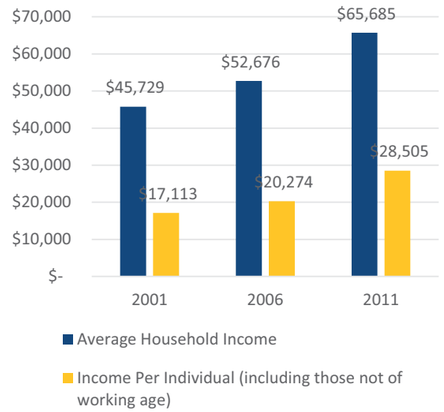



## Household Profile

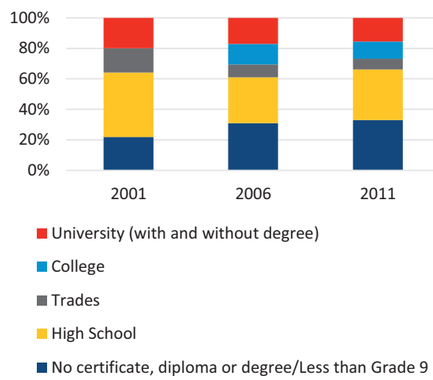



Dominant Household Type was 2 person from 2001-2011.

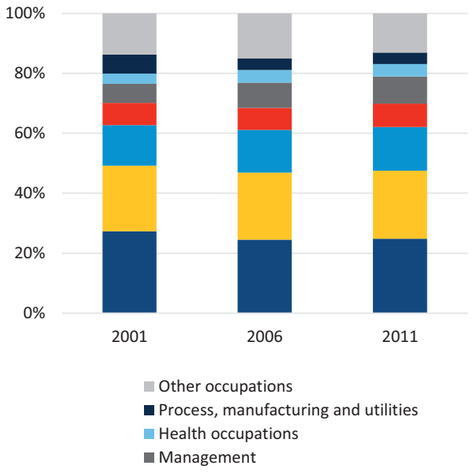
## Income Profile



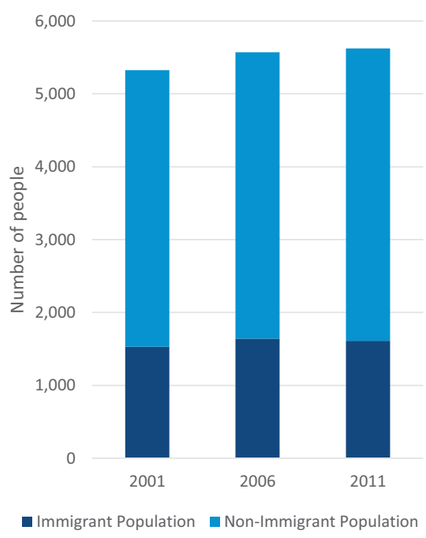

## Highest Level of Educational Attainment




## Labour Force by Occupation




## Immigrant Population

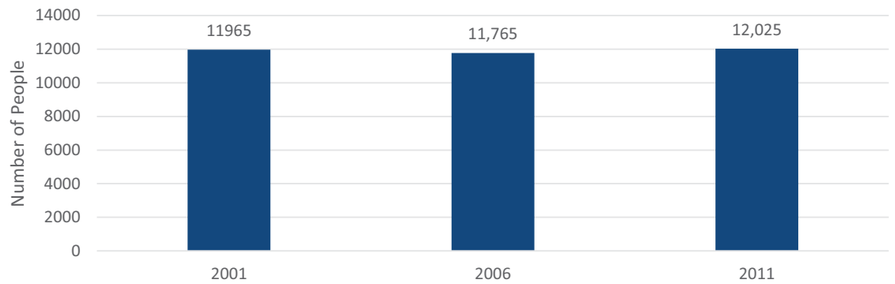







# 12. Clearbrook Centre

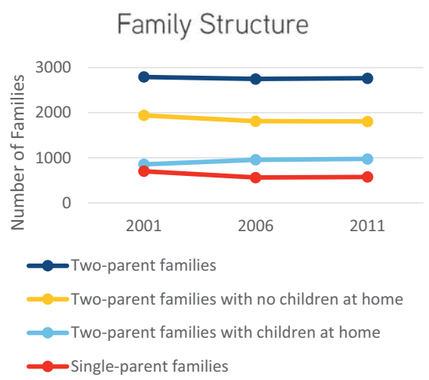
## Population Growth 2001-2011



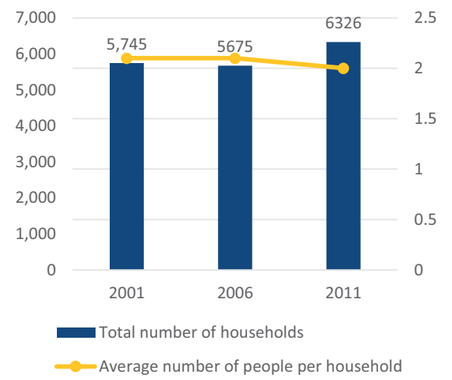

## Age Profile

| | 2011 census | 2035 projection |
|---|---|---|
| 0 to 4 years | 595 | 1,034 |
| 5 to 19 years | 1,575 | 2,554 |
| 20 to 24 years | 710 | 1,446 |
| 25 to 34 years | 1,525 | 3,227 |
| 35 to 44 years | 1,280 | 2,456 |
| 45 to 54 years | 1,260 | 2,393 |
| 55 to 64 years | 1,510 | 2,890 |
| 65 to 74 years | 1,475 | 2,965 |
| 75 years and over | 2,120 | 4,234 |
| **Total Population** | **12,025** | **23,200** |

## Family Structure

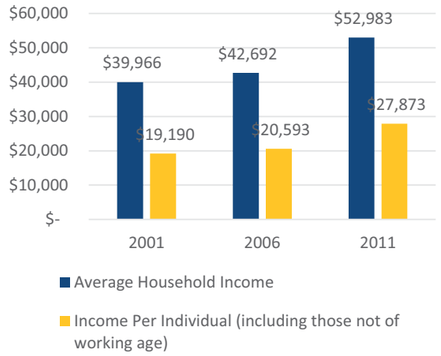



## Household Profile

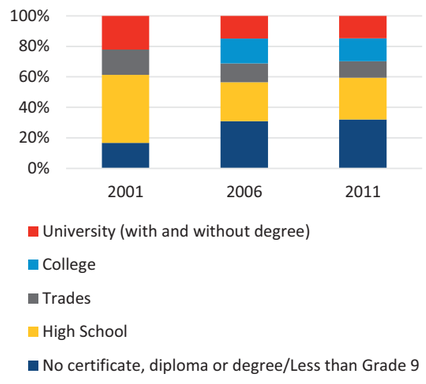



Dominant Household Type was 2 person in 2001, 1 person from 2006-2011.

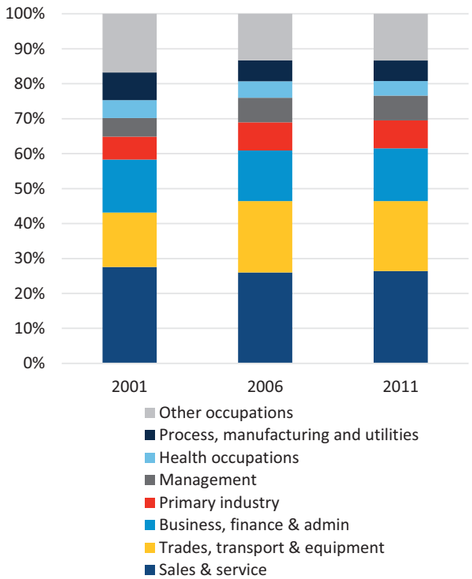
## Income Profile



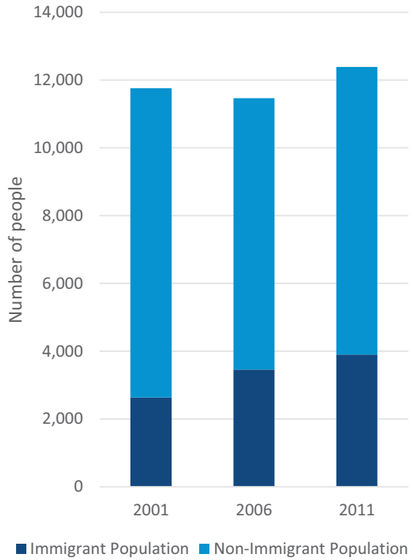

## Highest Level of Educational Attainment




## Labour Force by Occupation




## Immigrant Population

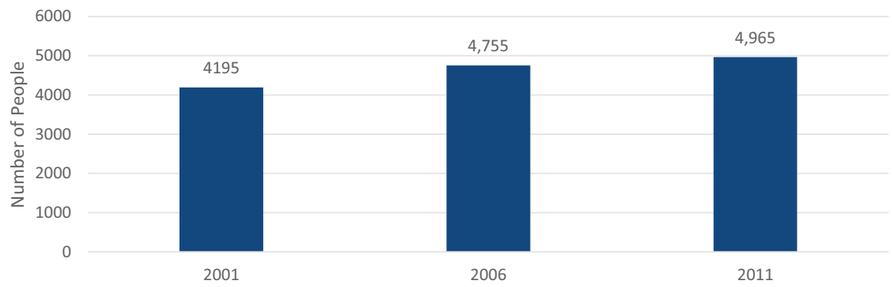







# 13. Babich

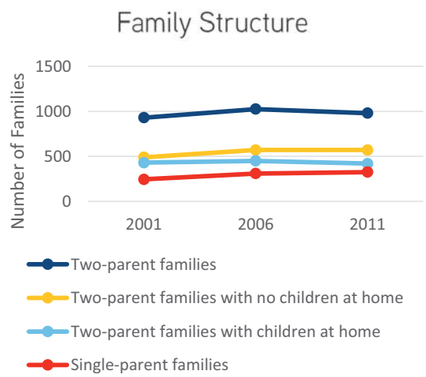
## Population Growth 2001-2011



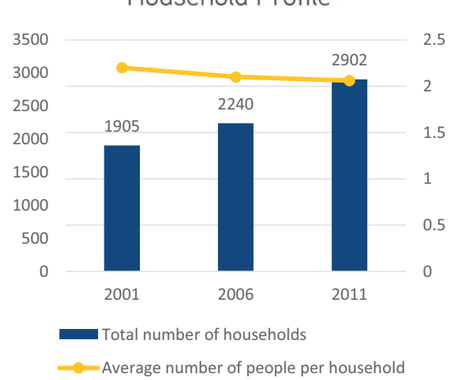

## Age Profile

| | 2011 census | 2035 projection |
|---|---|---|
| 0 to 4 years | 320 | 439 |
| 5 to 19 years | 735 | 1,007 |
| 20 to 24 years | 400 | 574 |
| 25 to 34 years | 815 | 1,302 |
| 35 to 44 years | 675 | 969 |
| 45 to 54 years | 725 | 971 |
| 55 to 64 years | 640 | 1,023 |
| 65 to 74 years | 380 | 811 |
| 75 years and over | 345 | 904 |
| **Total Population** | **4,965** | **8,000** |

## Family Structure

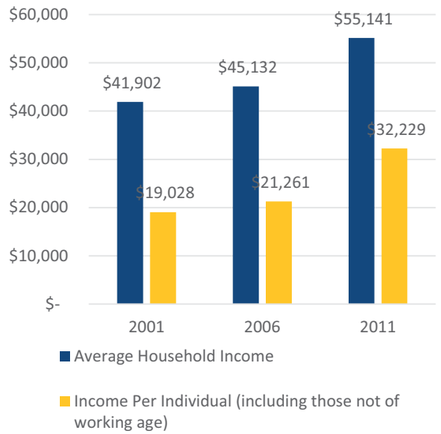



## Household Profile

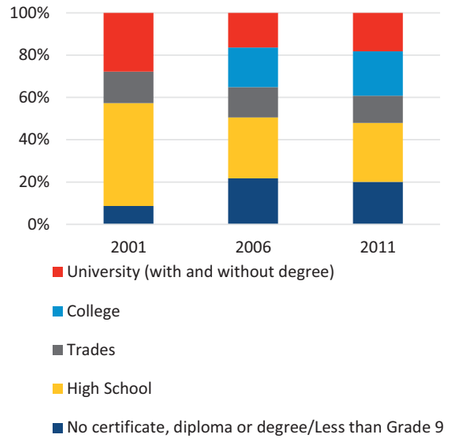



Dominant Household Type was 2 person in 2001, 1 person in 2006, 2 person in 2011.

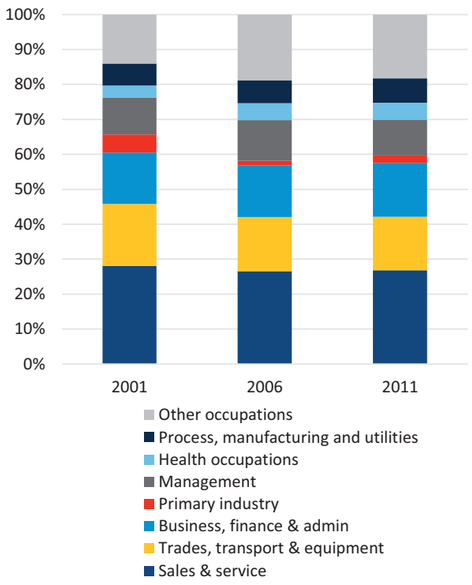
## Income Profile



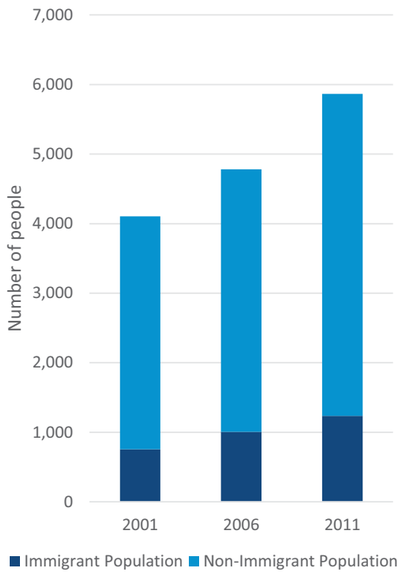

## Highest Level of Educational Attainment




## Labour Force by Occupation




## Immigrant Population

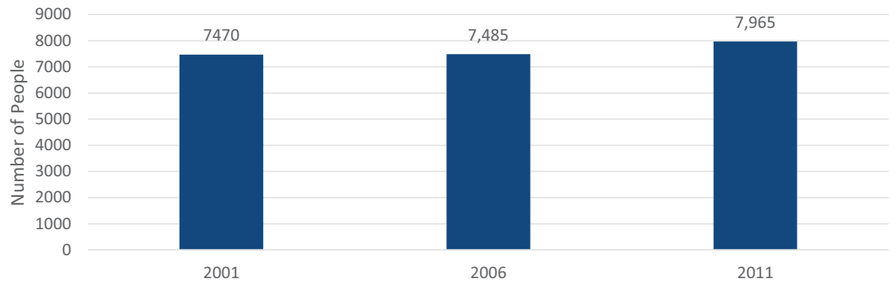







# 14. South Clearbrook

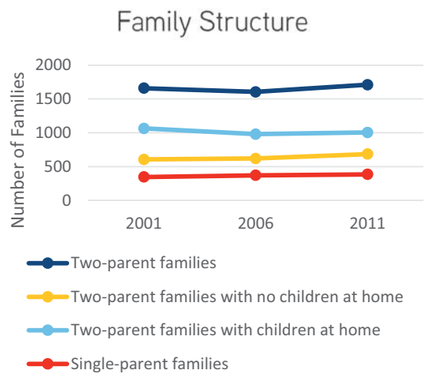
## Population Growth 2001-2011



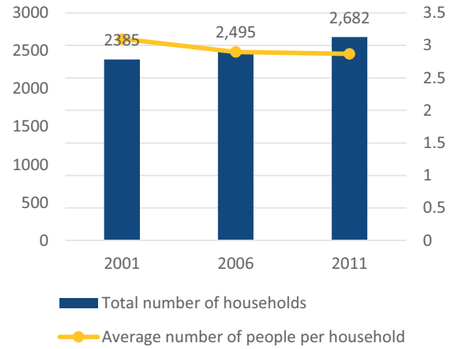

## Age Profile

| | 2011 census | 2035 projection |
|---|---|---|
| 0 to 4 years | 575 | 659 |
| 5 to 19 years | 1,550 | 1,748 |
| 20 to 24 years | 555 | 750 |
| 25 to 34 years | 1,090 | 1,449 |
| 35 to 44 years | 1,125 | 1,315 |
| 45 to 54 years | 1,040 | 1,240 |
| 55 to 64 years | 705 | 1,033 |
| 65 to 74 years | 590 | 818 |
| 75 years and over | 780 | 1,088 |
| **Total Population** | **7,965** | **10,100** |

## Family Structure

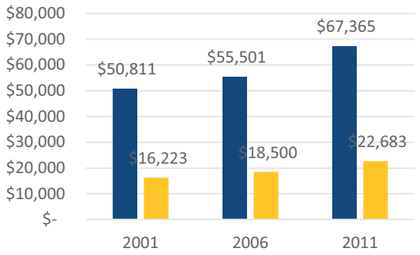



## Household Profile

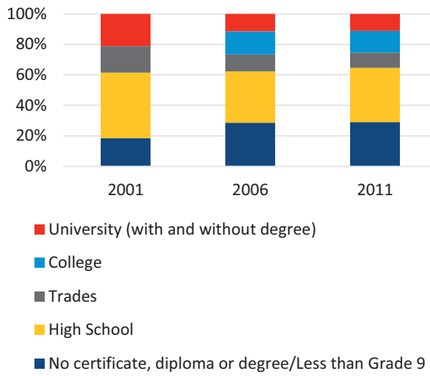



Dominant Household Type was 4 or 5 person in 2001, 2 person from 2006-2011.

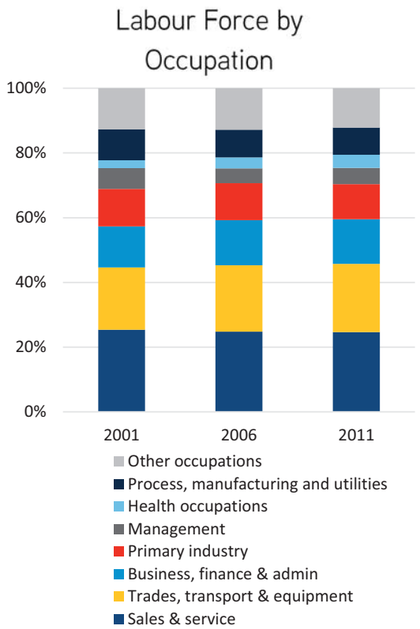
## Income Profile



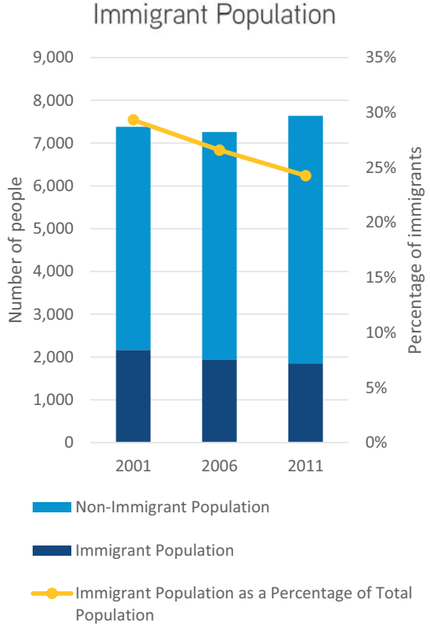

## Highest Level of Educational Attainment




## Labour Force by Occupation




## Immigrant Population

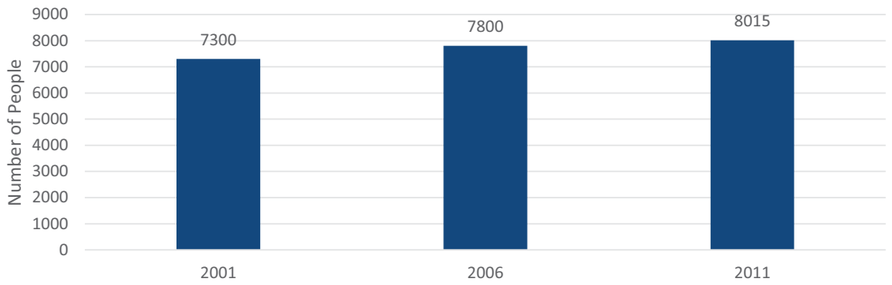







# 15. Mill Lake

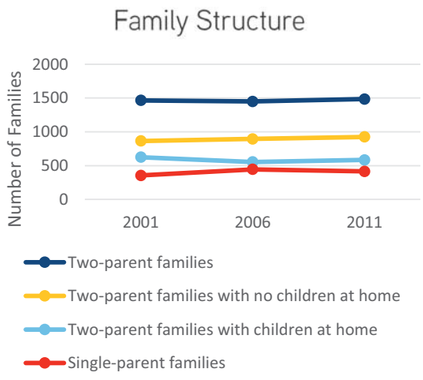
## Population Growth 2001-2011



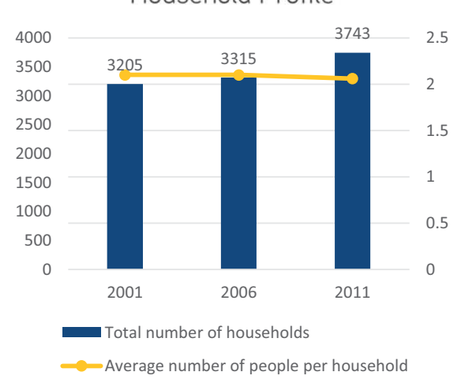

## Age Profile

| | 2011 census | 2035 projection |
|---|---|---|
| 0 to 4 years | 405 | 737 |
| 5 to 19 years | 1,065 | 1,815 |
| 20 to 24 years | 545 | 1,049 |
| 25 to 34 years | 925 | 2,246 |
| 35 to 44 years | 790 | 1,637 |
| 45 to 54 years | 930 | 1,718 |
| 55 to 64 years | 895 | 1,990 |
| 65 to 74 years | 810 | 1,905 |
| 75 years and over | 1,700 | 3,102 |
| **Total Population** | **8,015** | **16,200** |

## Family Structure

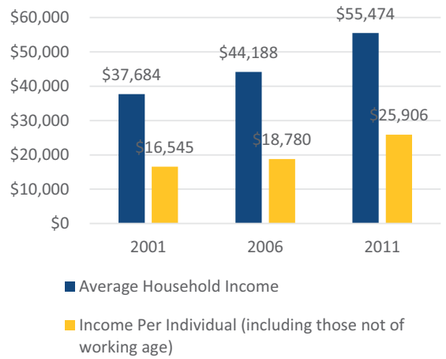



## Household Profile

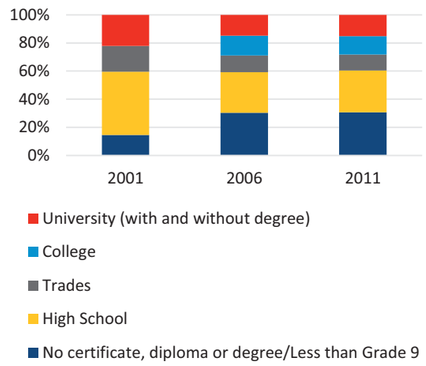



Dominant Household Type was 1 person from 2001-2011.

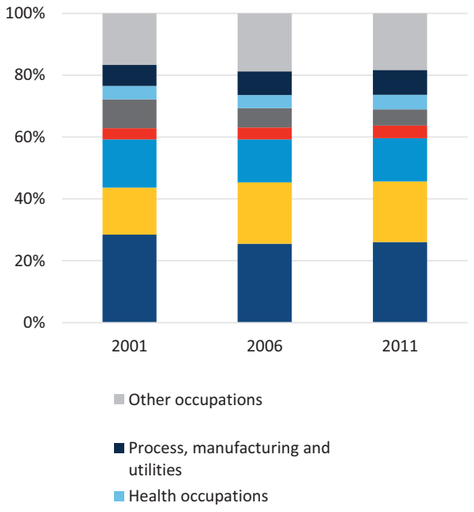
## Income Profile



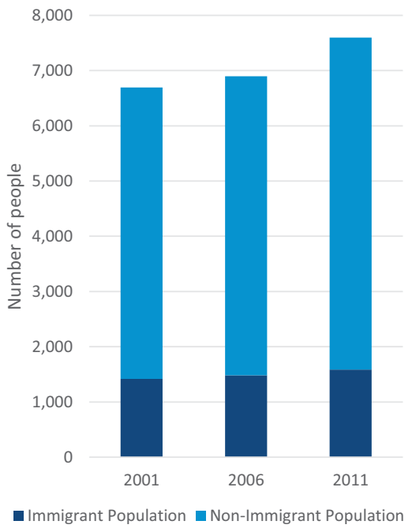

## Highest Level of Educational Attainment




## Labour Force by Occupation




## Immigrant Population

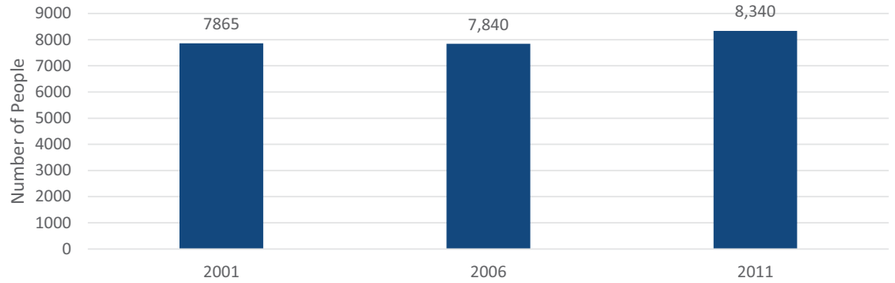







# 16. Abbotsford Centre

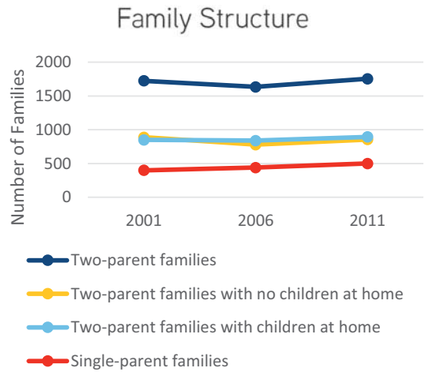
## Population Growth 2001-2011



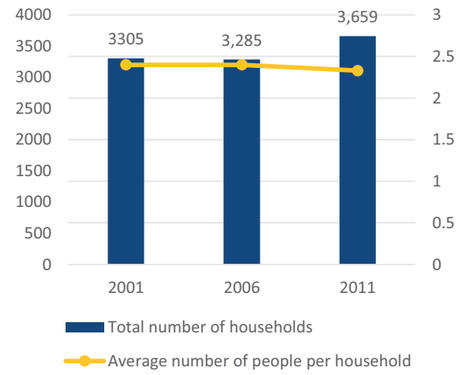

## Age Profile

| | 2011 census | 2035 projection |
|---|---|---|
| 0 to 4 years | 620 | 865 |
| 5 to 19 years | 1,380 | 1,980 |
| 20 to 24 years | 770 | 1,157 |
| 25 to 34 years | 1,445 | 2,509 |
| 35 to 44 years | 1,105 | 1,805 |
| 45 to 54 years | 1,315 | 1,864 |
| 55 to 64 years | 960 | 1,916 |
| 65 to 74 years | 450 | 1,454 |
| 75 years and over | 330 | 1,650 |
| **Total Population** | **8,340** | **15,200** |

## Family Structure

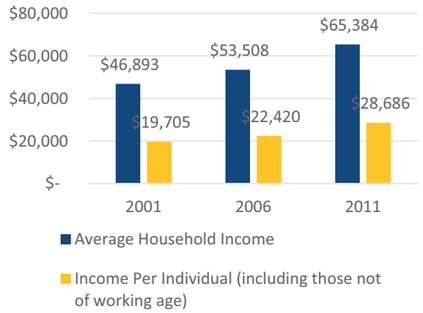



## Household Profile

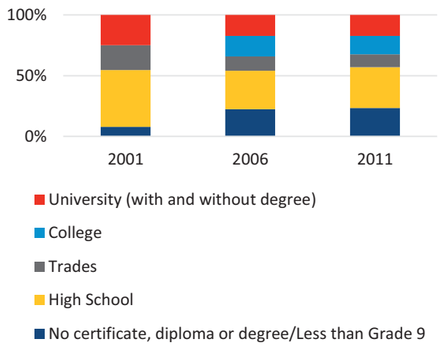



Dominant Household Type was 2 person from 2001-2011.

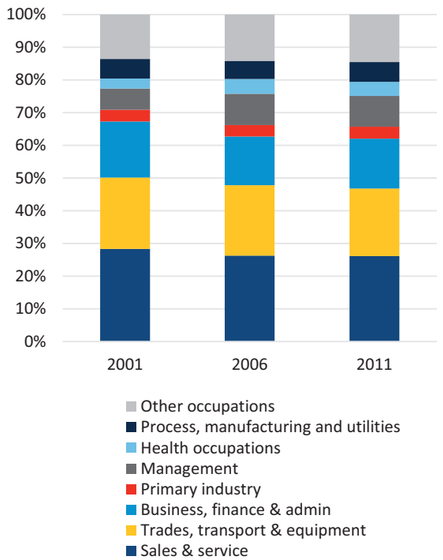
## Income Profile



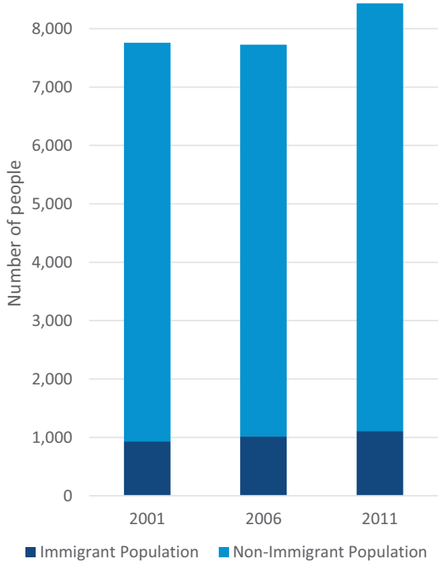

## Highest Level of Educational Attainment




## Labour Force by Occupation




## Immigrant Population

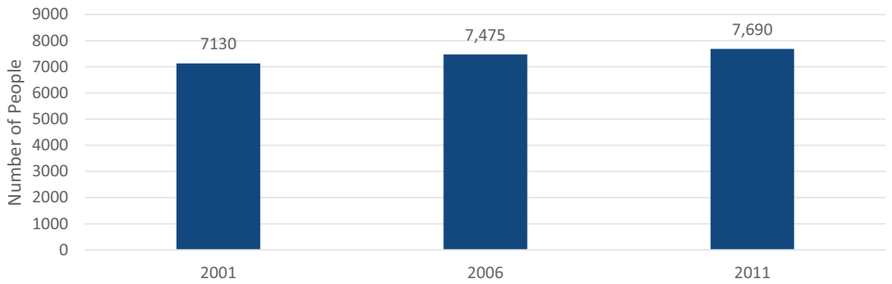







# 17. McMillan

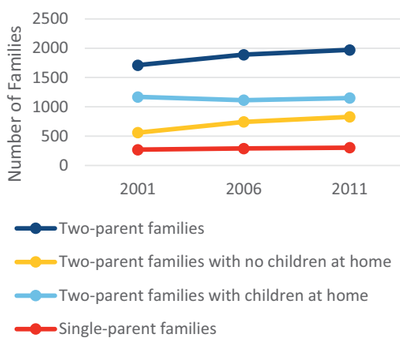
## Population Growth 2001-2011



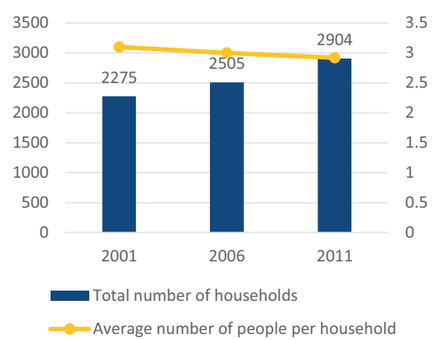

## Age Profile

| | 2011 census | 2035 projection |
|---|---|---|
| 0 to 4 years | 445 | 565 |
| 5 to 19 years | 1,660 | 1,791 |
| 20 to 24 years | 535 | 837 |
| 25 to 34 years | 835 | 1,443 |
| 35 to 44 years | 1,065 | 1,276 |
| 45 to 54 years | 1,320 | 1,539 |
| 55 to 64 years | 1,115 | 1,544 |
| 65 to 74 years | 470 | 1,037 |
| 75 years and over | 255 | 868 |
| **Total Population** | **7,690** | **10,900** |

## Family Structure

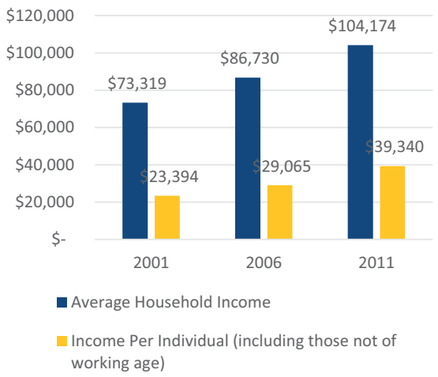



## Household Profile

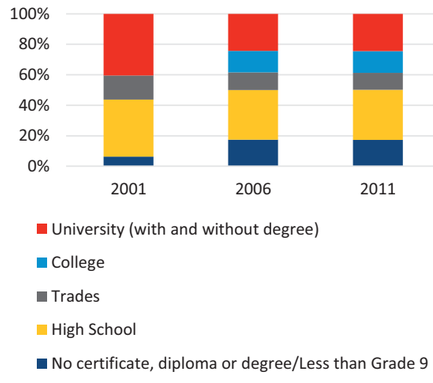



Dominant Household Type was 4 or 5 person in 2001, 2 person from 2006-

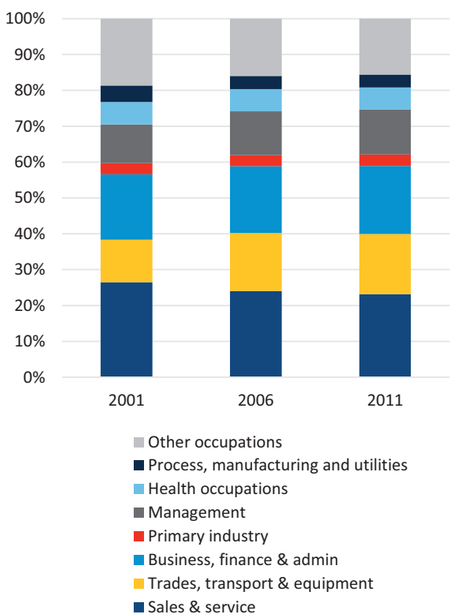
## Income Profile



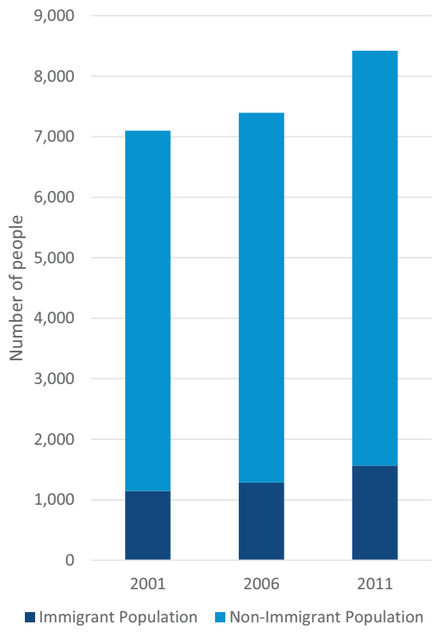

## Highest Level of Educational Attainment




## Labour Force by Occupation




## Immigrant Population

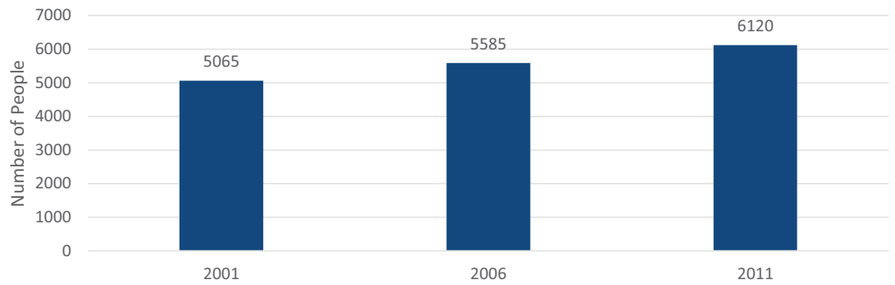







# 18. Whatcom

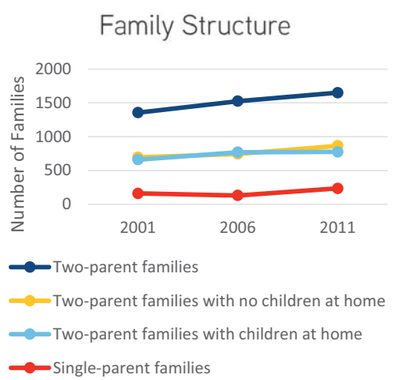
## Population Growth 2001-2011



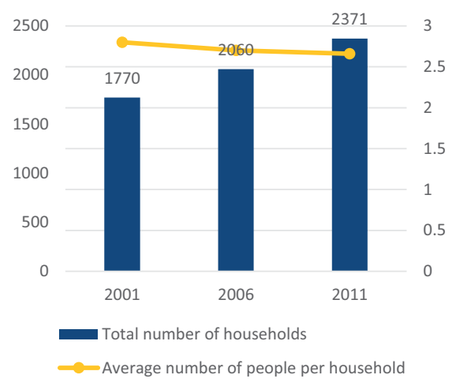

## Age Profile

| | 2011 census | 2035 projection |
|---|---|---|
| 0 to 4 years | 300 | 379 |
| 5 to 19 years | 1,185 | 1,262 |
| 20 to 24 years | 430 | 603 |
| 25 to 34 years | 720 | 1,111 |
| 35 to 44 years | 730 | 886 |
| 45 to 54 years | 980 | 1,071 |
| 55 to 64 years | 950 | 1,158 |
| 65 to 74 years | 500 | 827 |
| 75 years and over | 350 | 702 |
| **Total Population** | **6120** | **8,000** |

## Family Structure

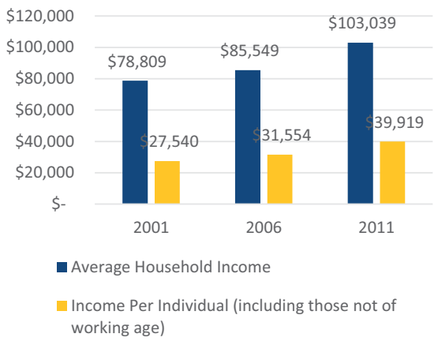



## Household Profile

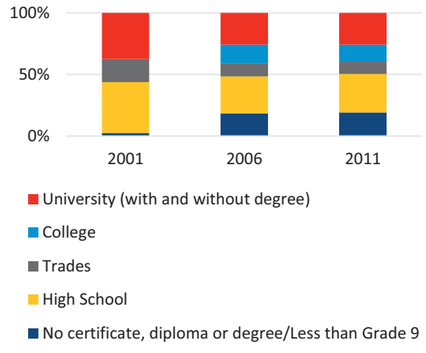



Dominant Household Type was 2 person from 2001-2011.

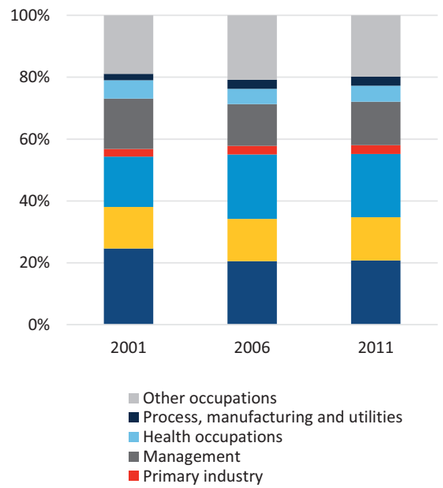
## Income Profile



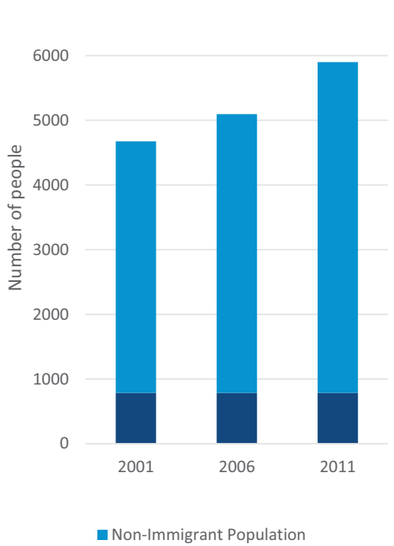

## Highest Level of Educational Attainment




## Labour Force by Occupation

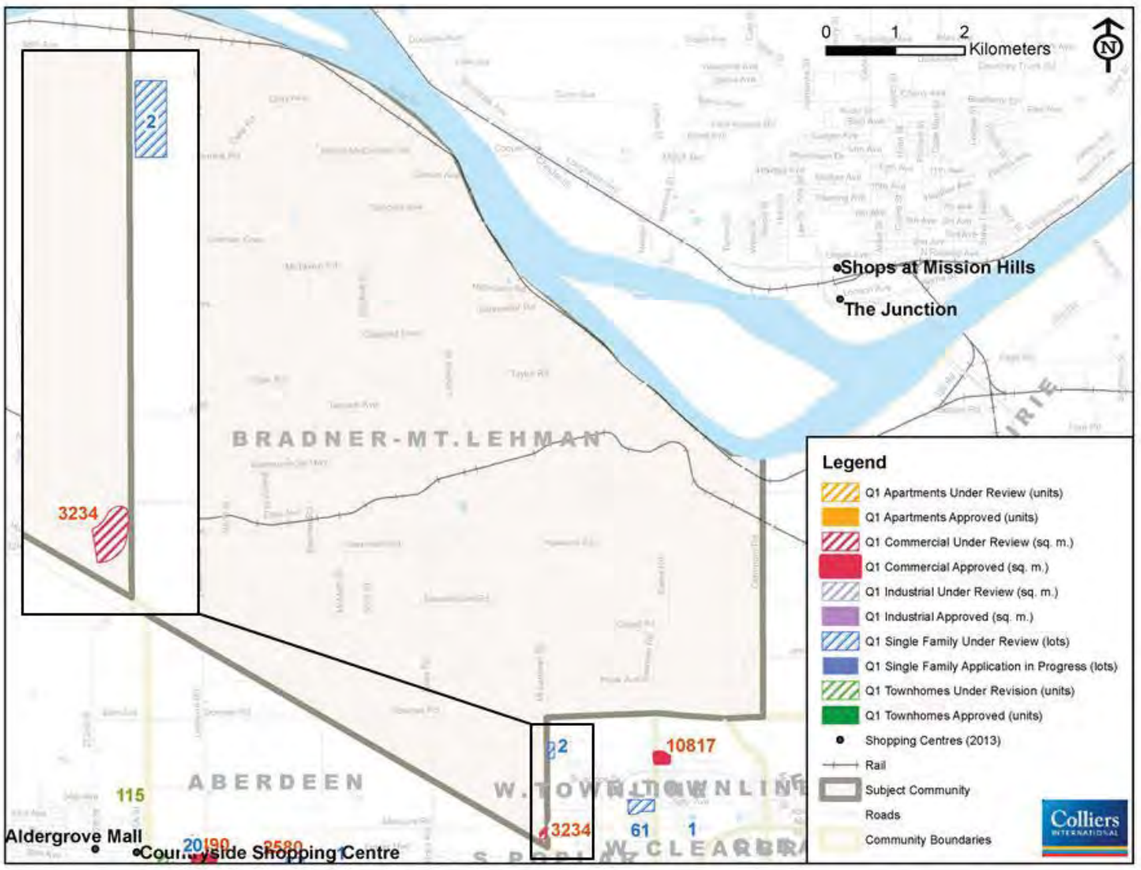



## Immigrant Population

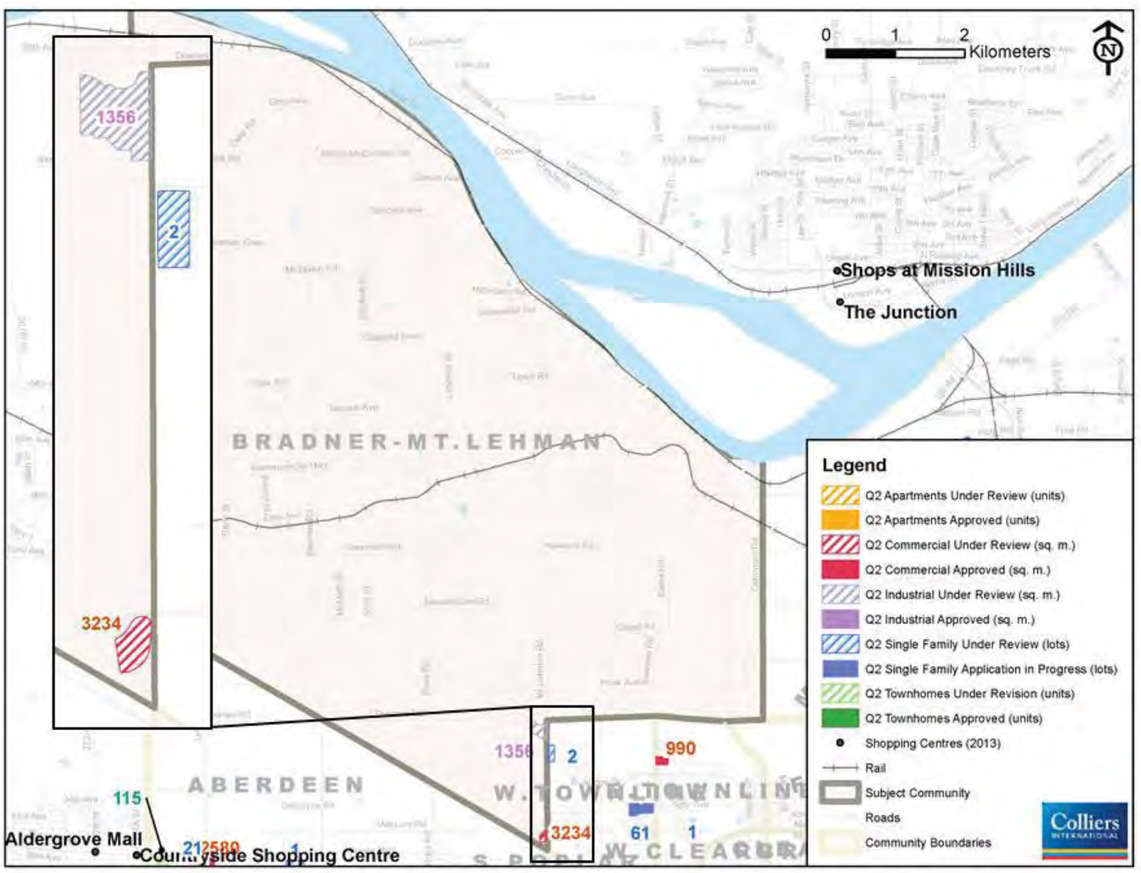



Appendix B – Housing Development Permit Maps

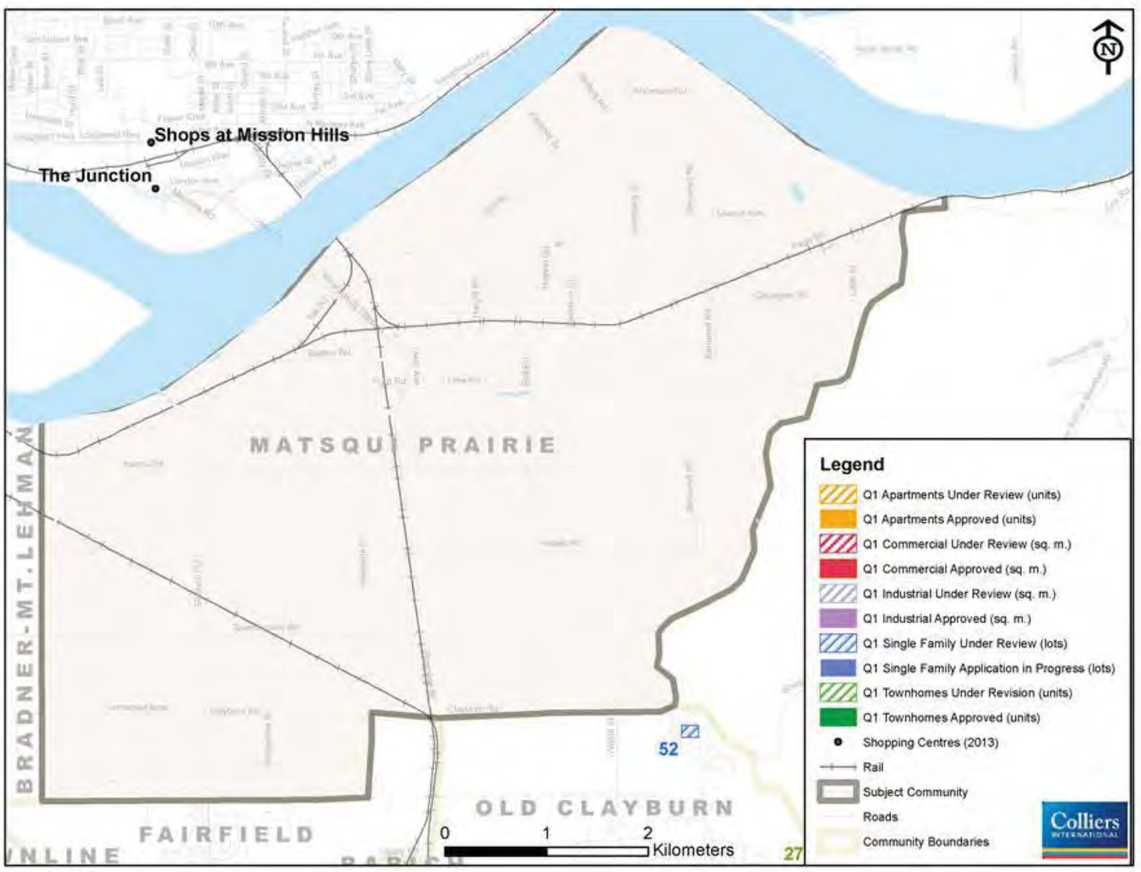
## Bradner – Mt. Lehman Q1




## Bradner – Mt. Lehman Q2

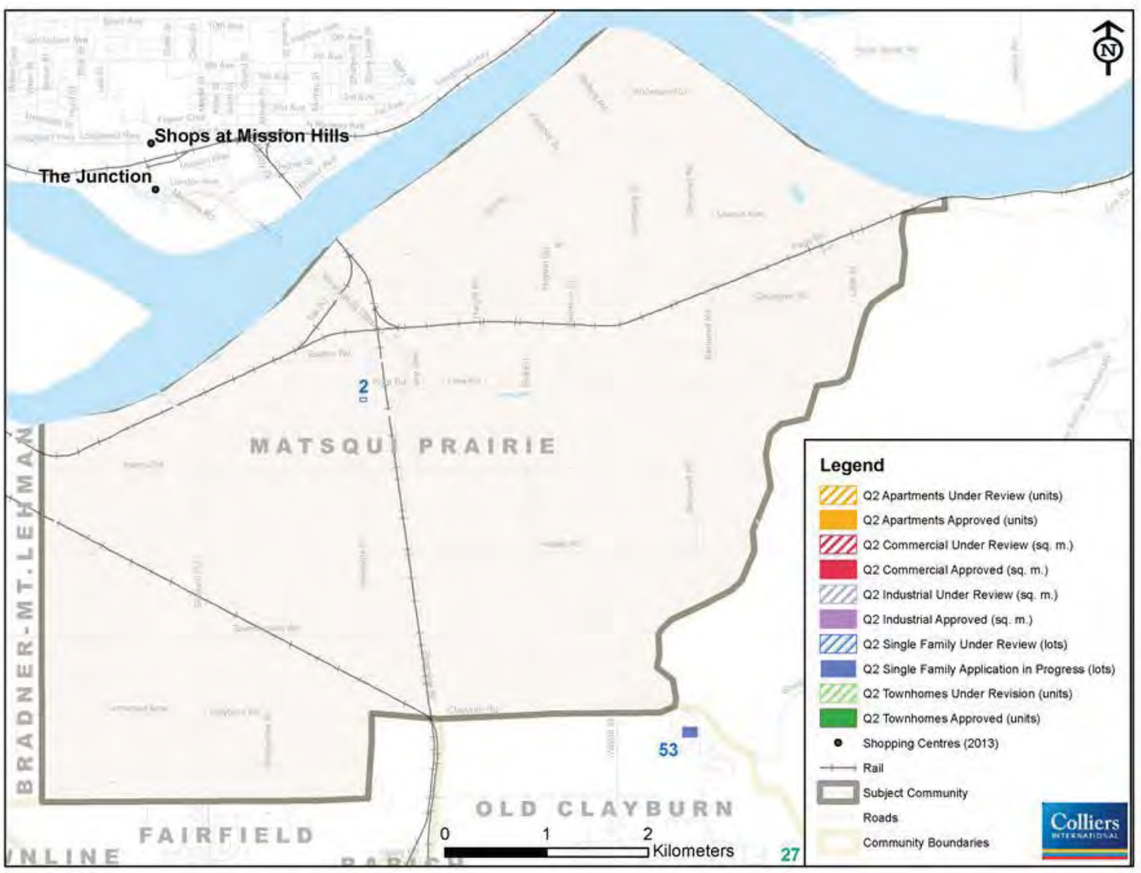


## Matsqui Prairie Q1

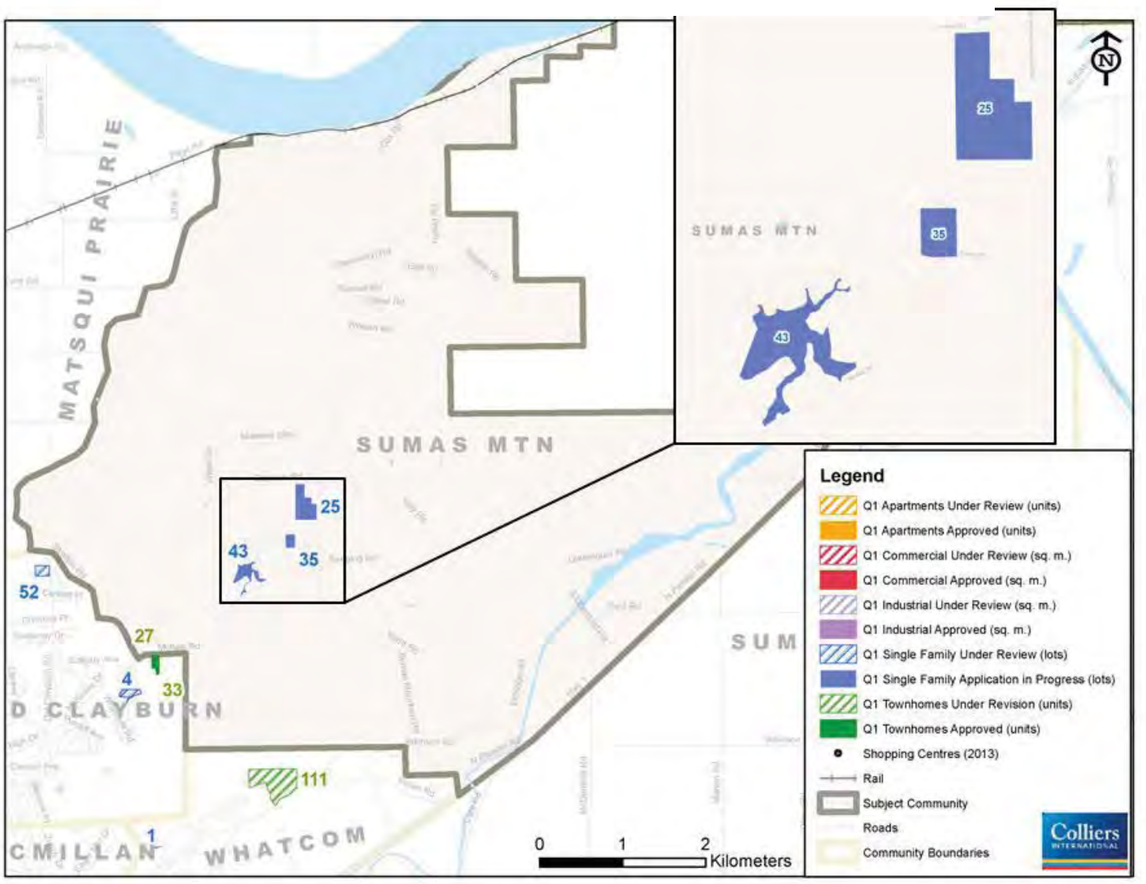





## Matsqui Prairie Q2

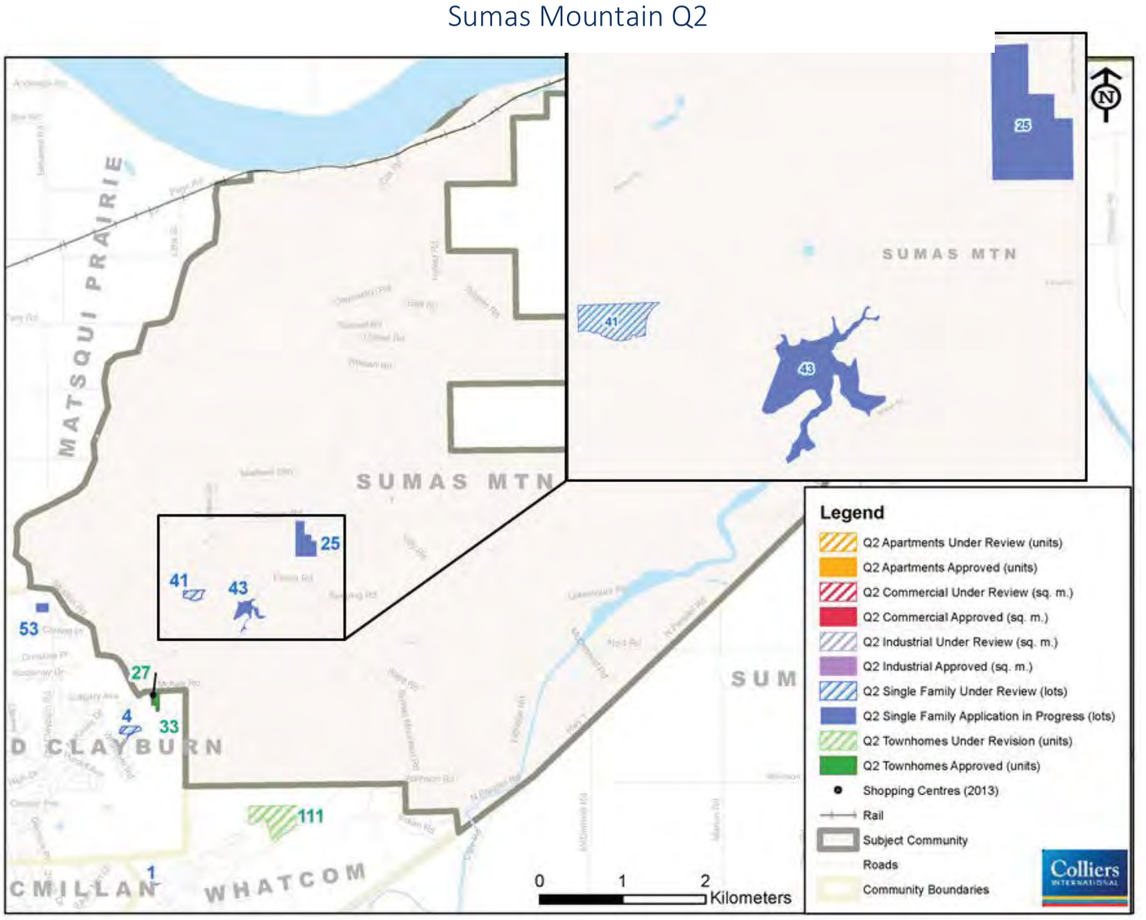


## Sumas Mountain Q1

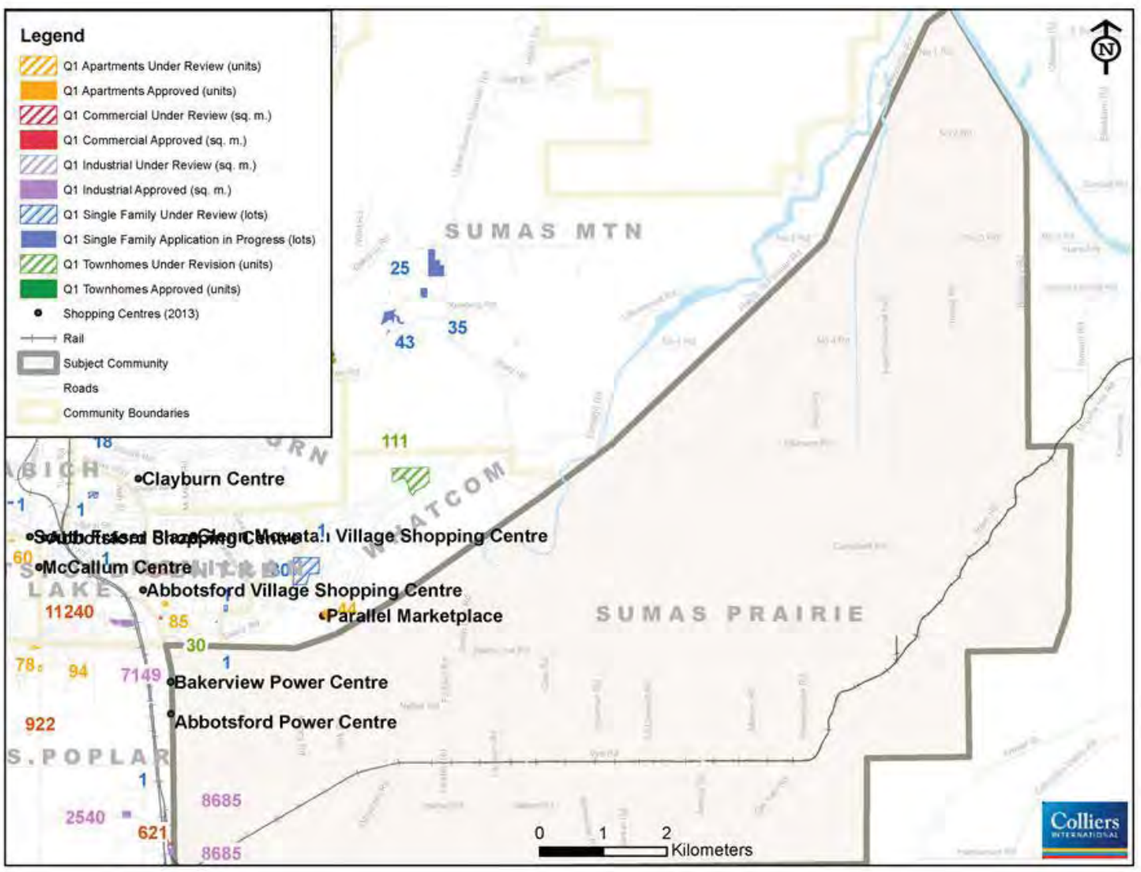





## Sumas Mountain Q2

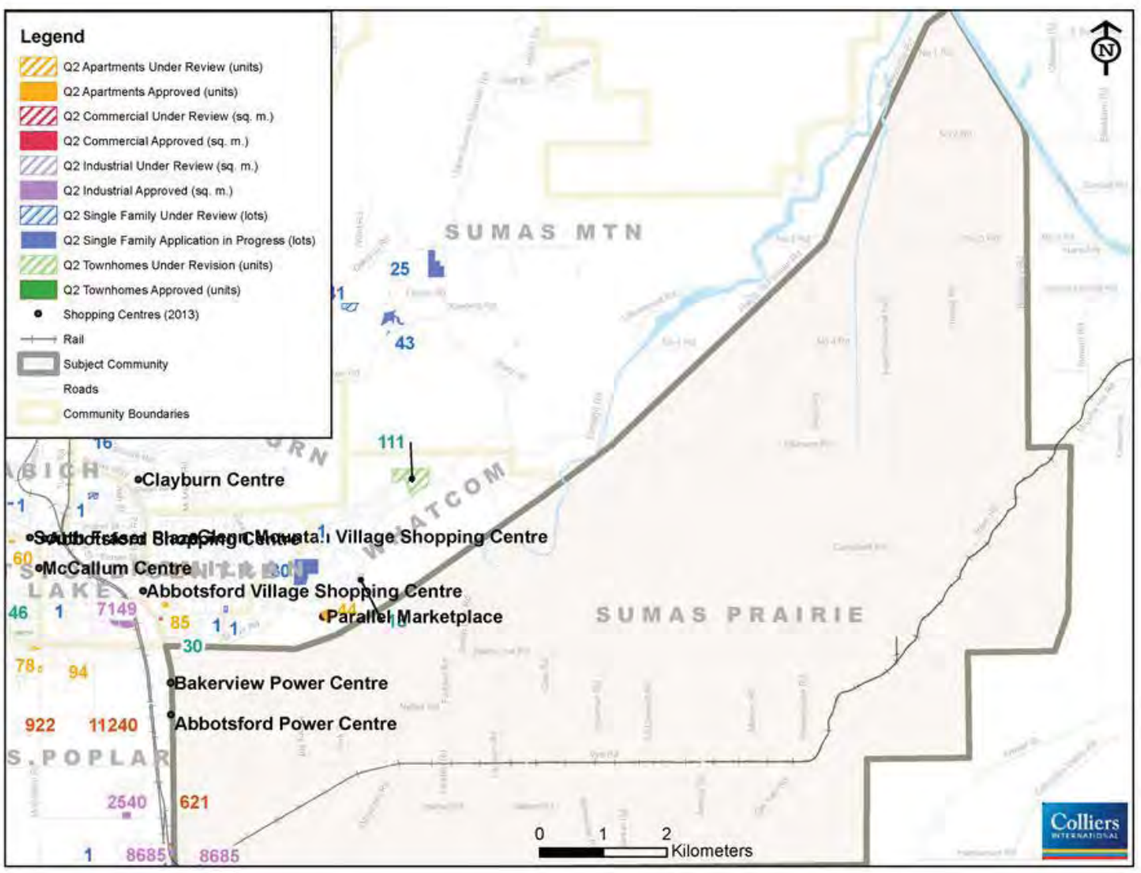


## Sumas Prairie Q1

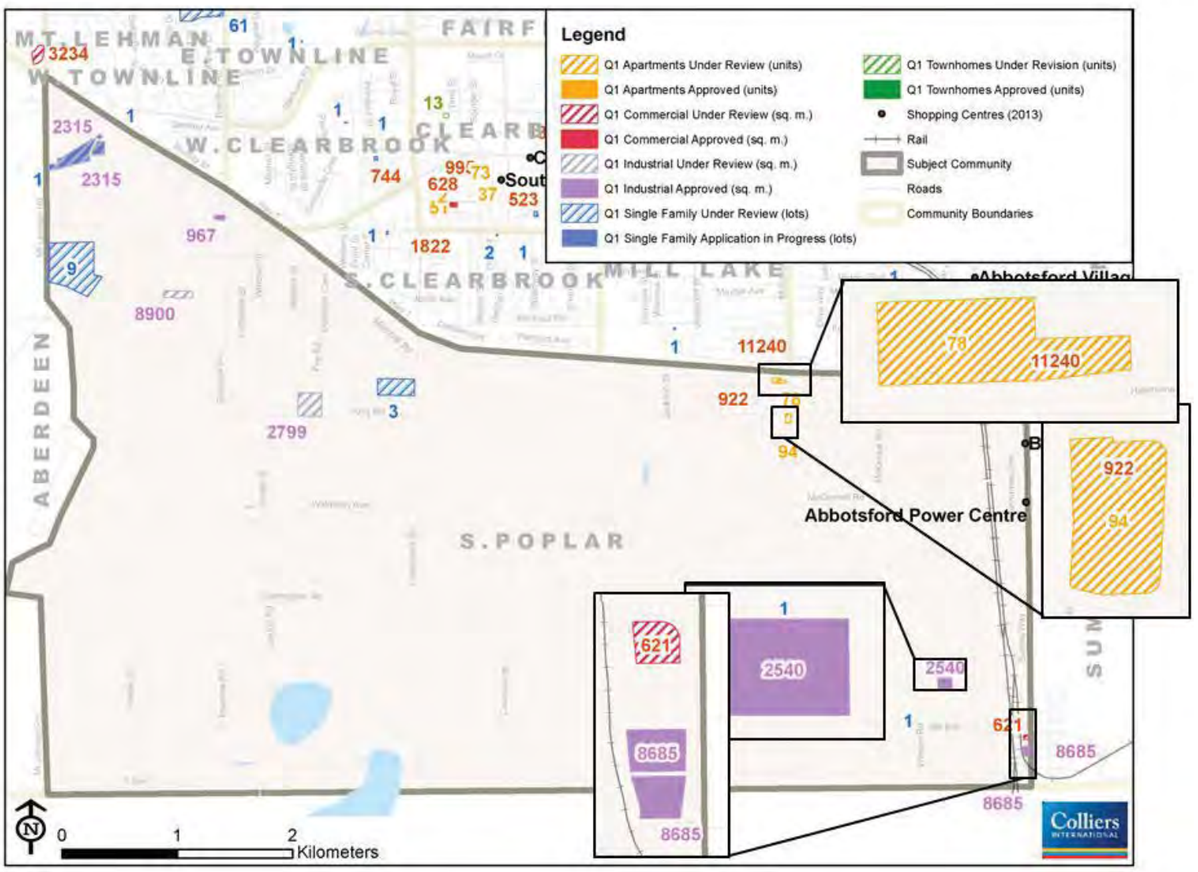





## Sumas Prairie Q2

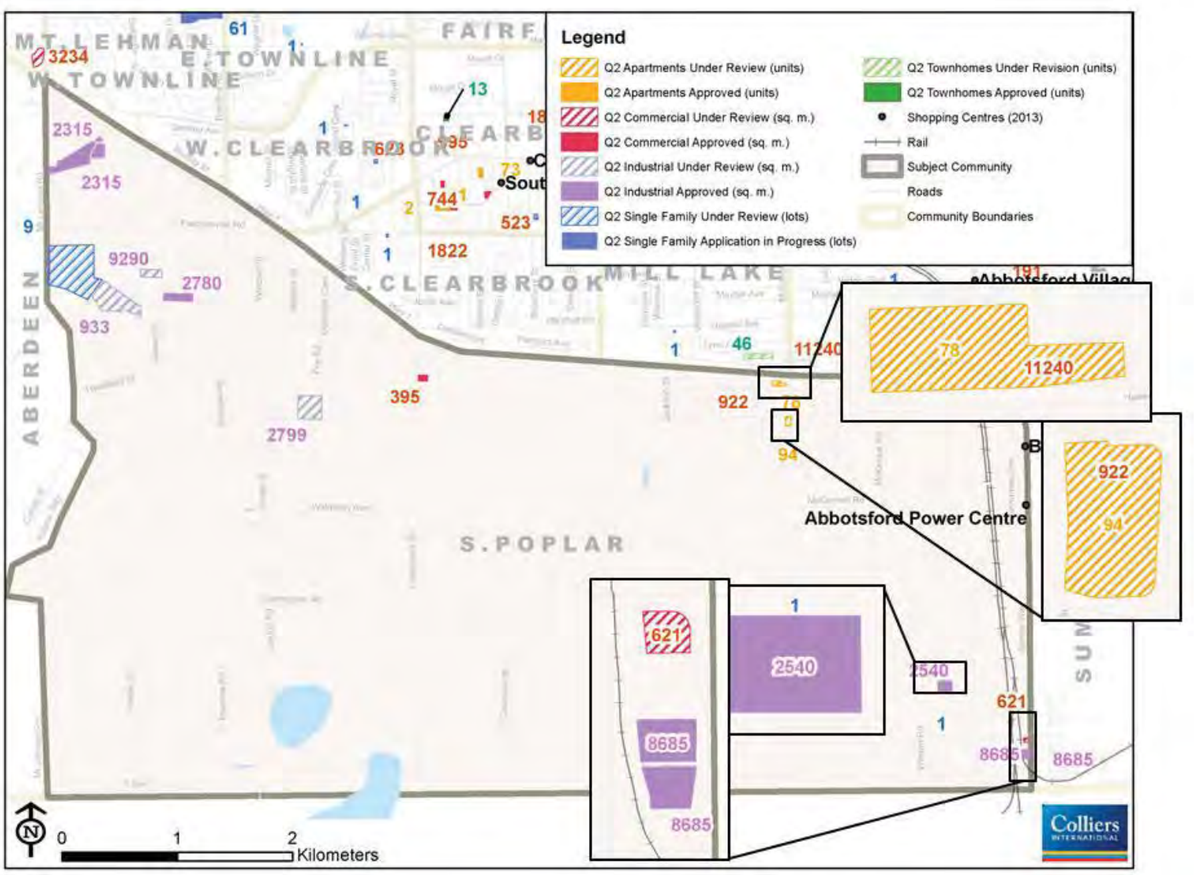


## South Poplar Q1

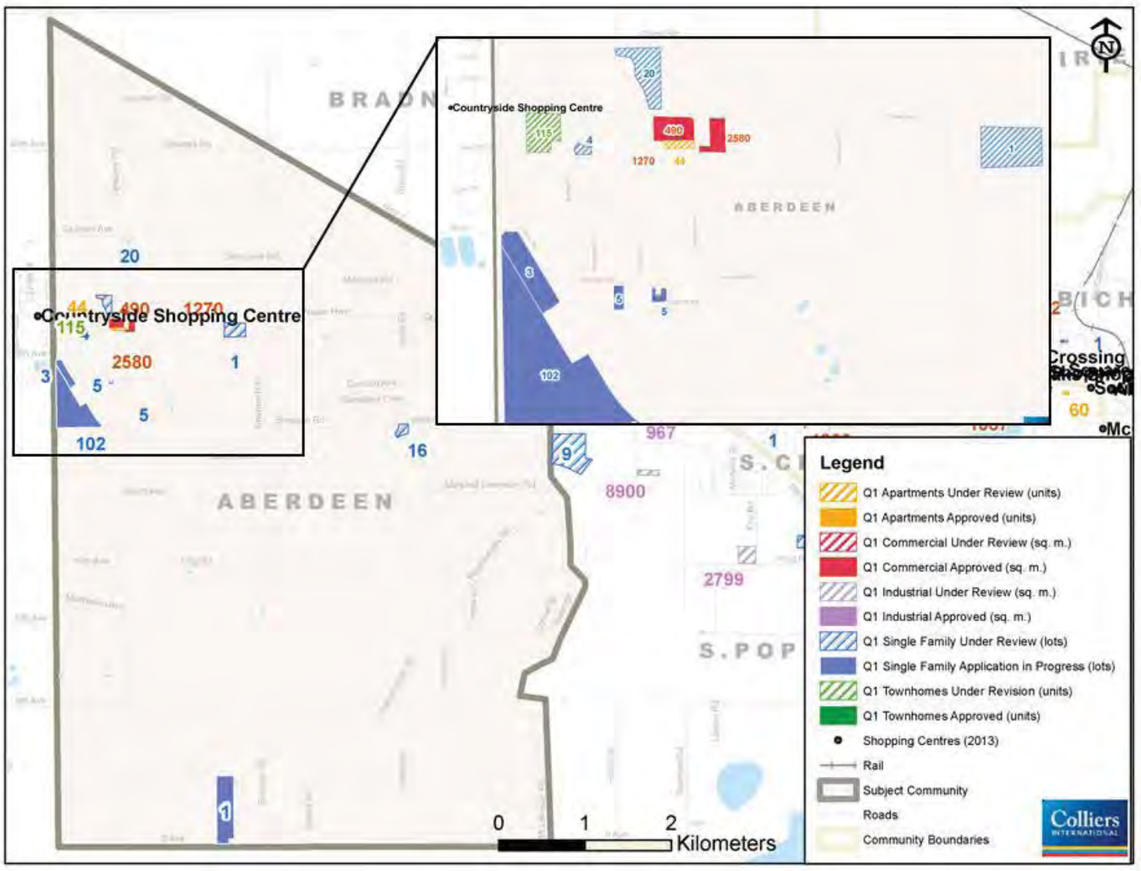





## South Poplar Q2

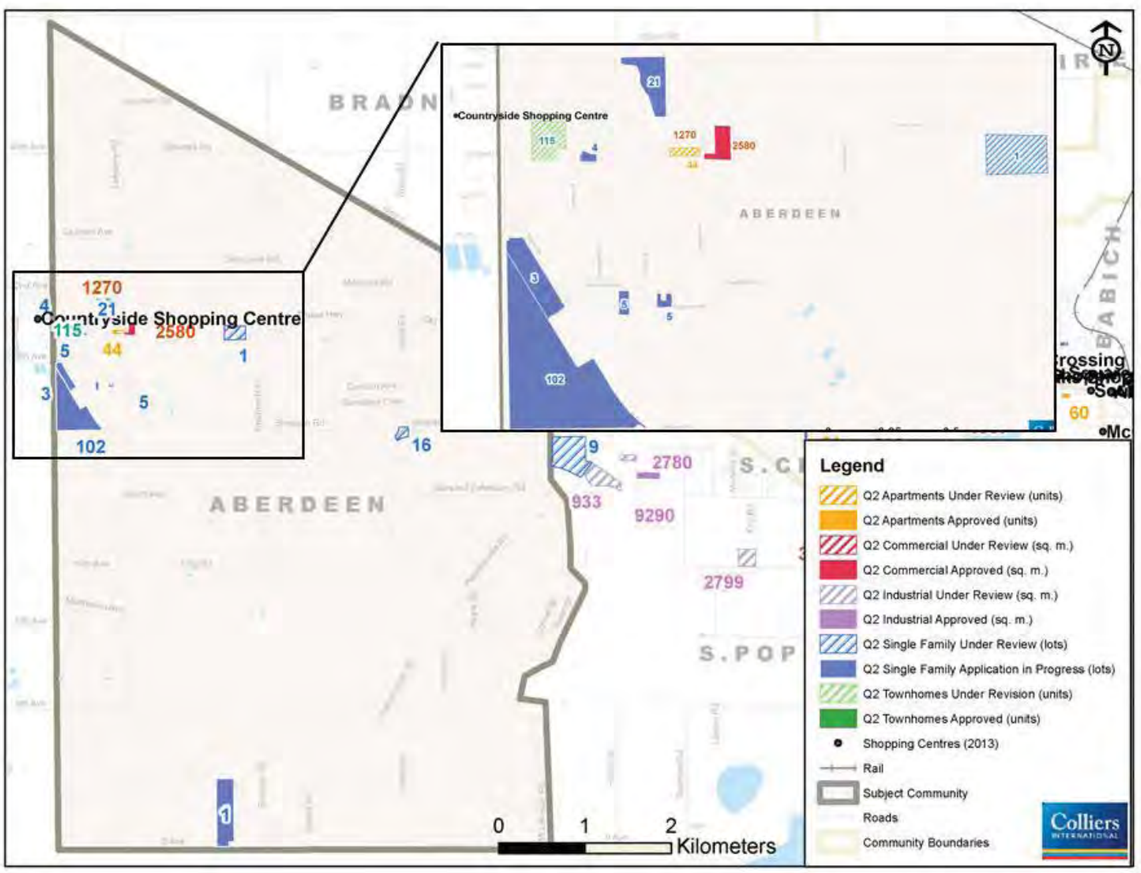


## Aberdeen Q1

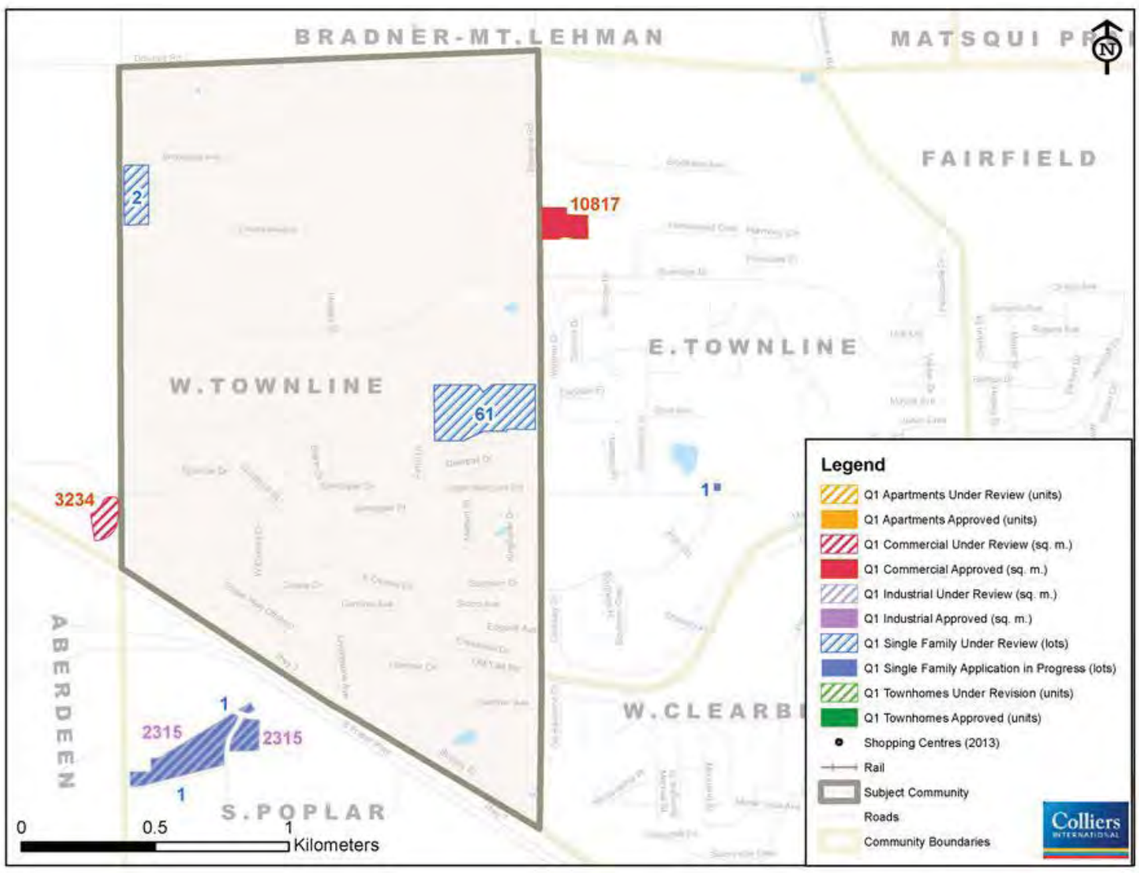





## Aberdeen Q2

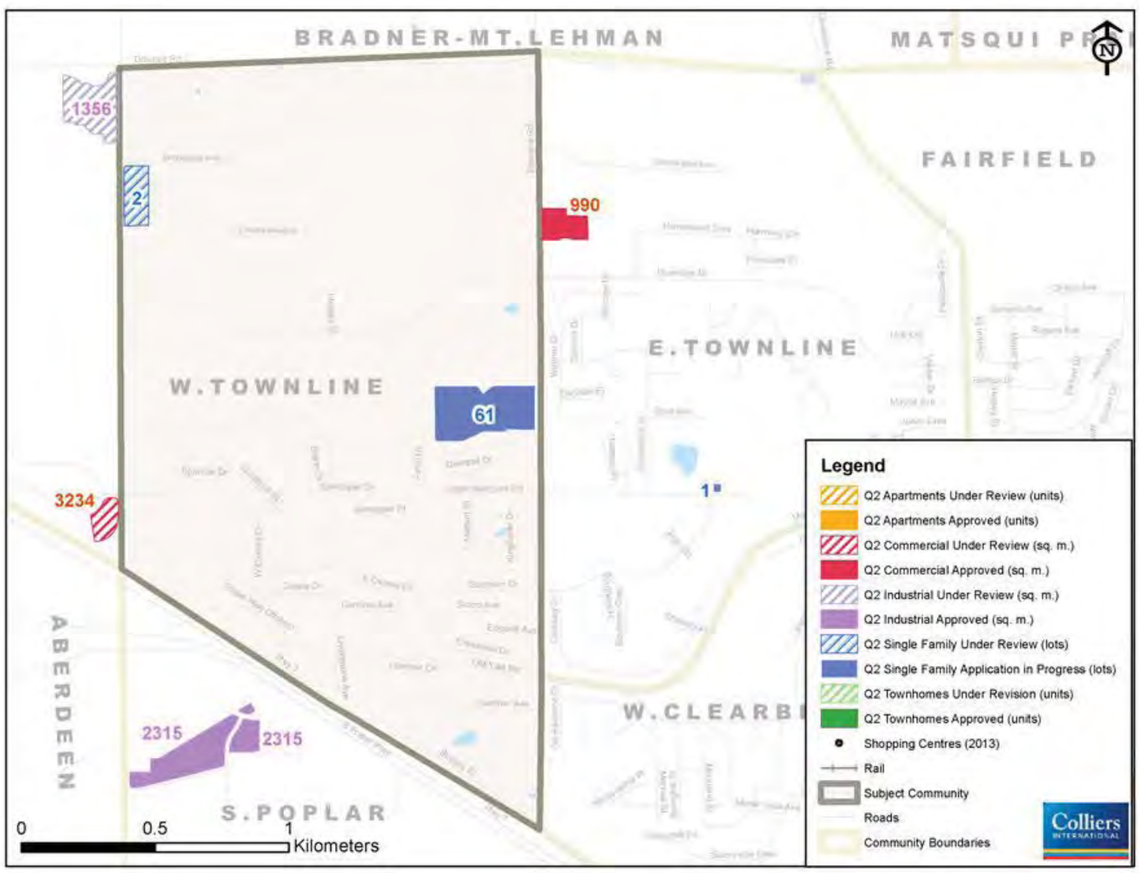


## West Townline Q1

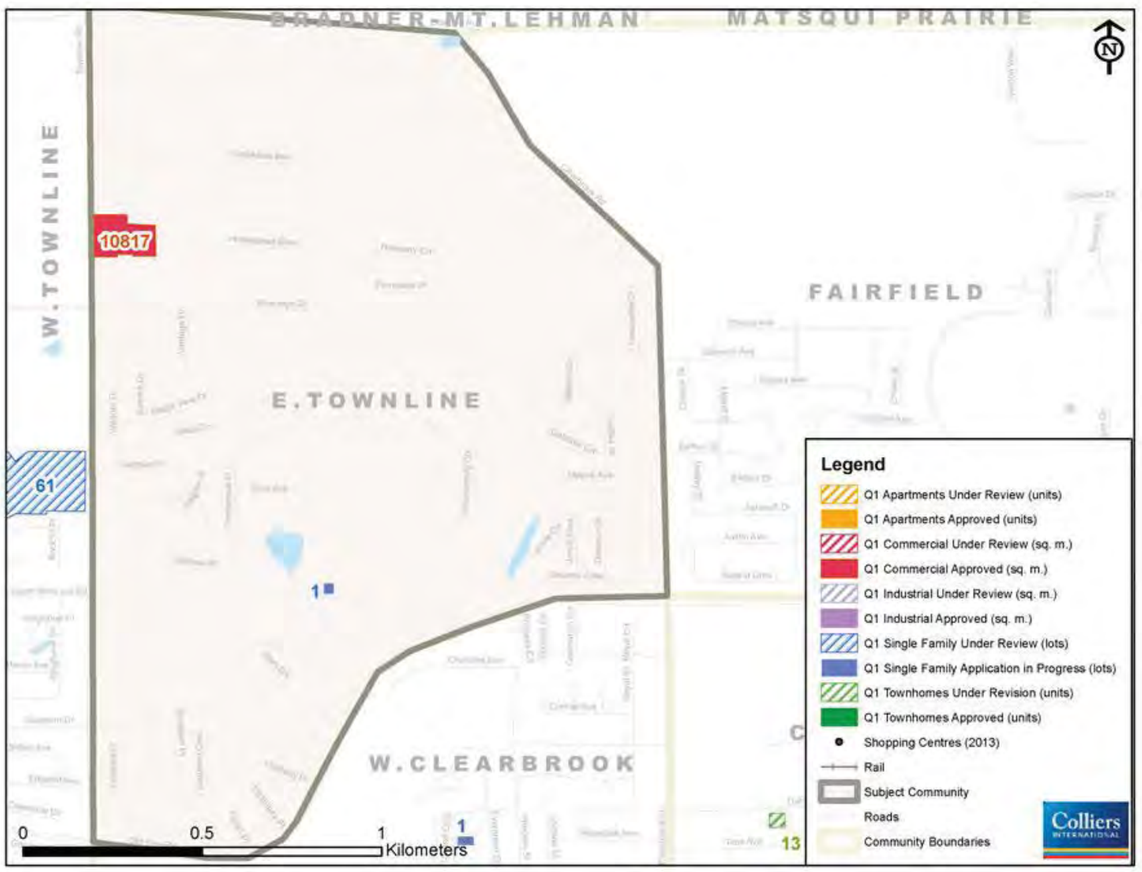





## West Townline Q2

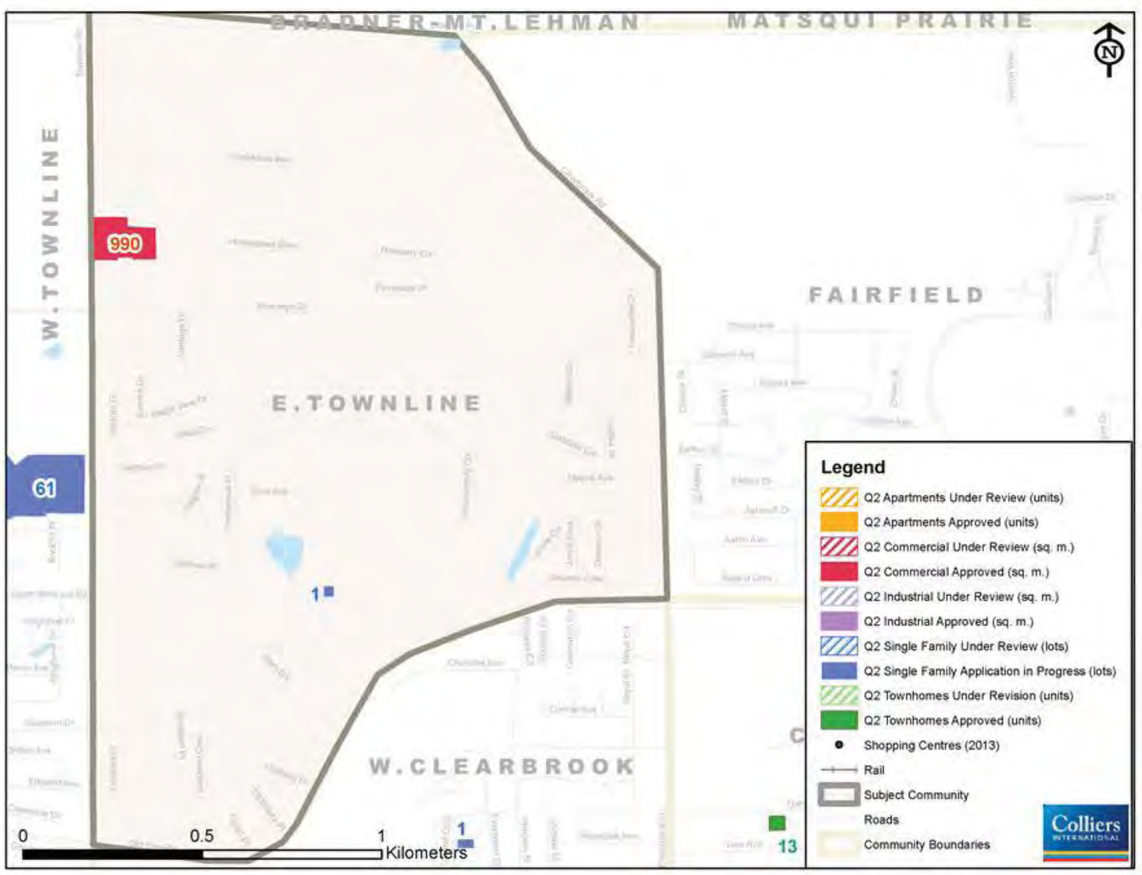


## East Townline Q1

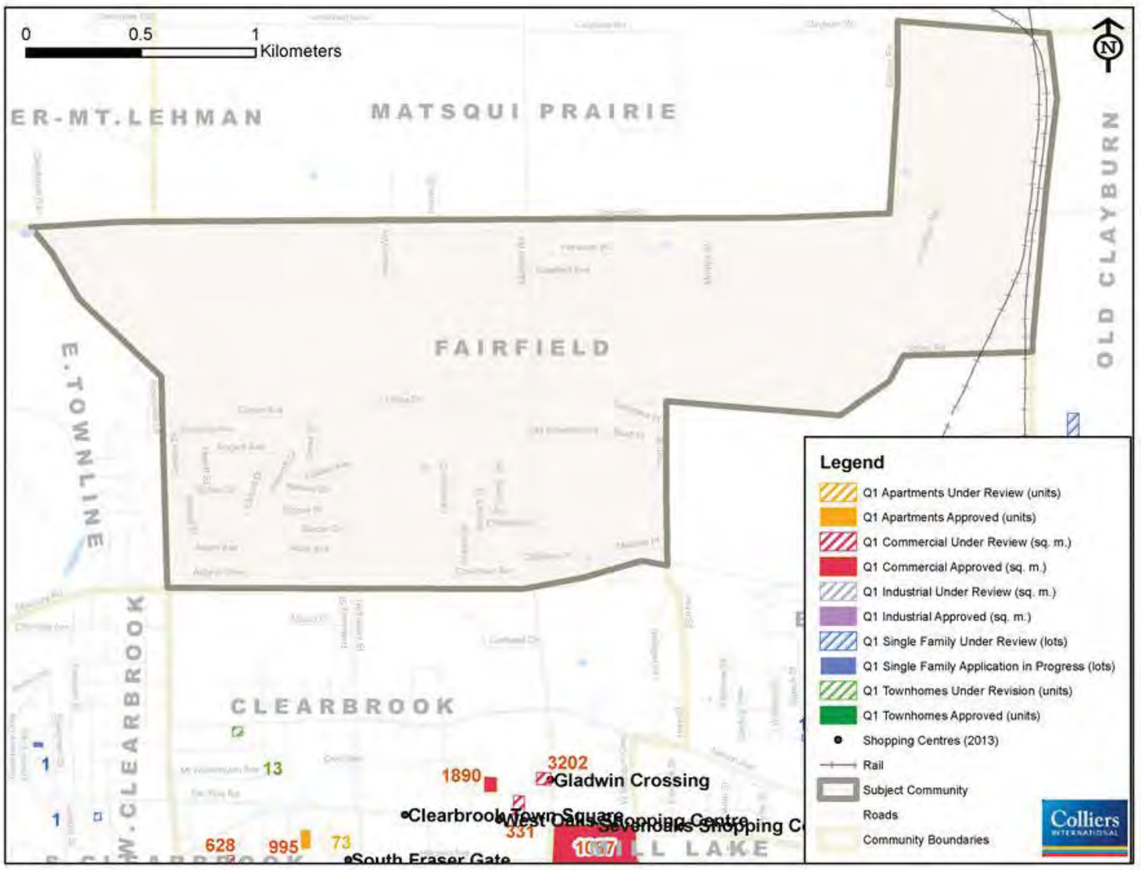





## East Townline Q2

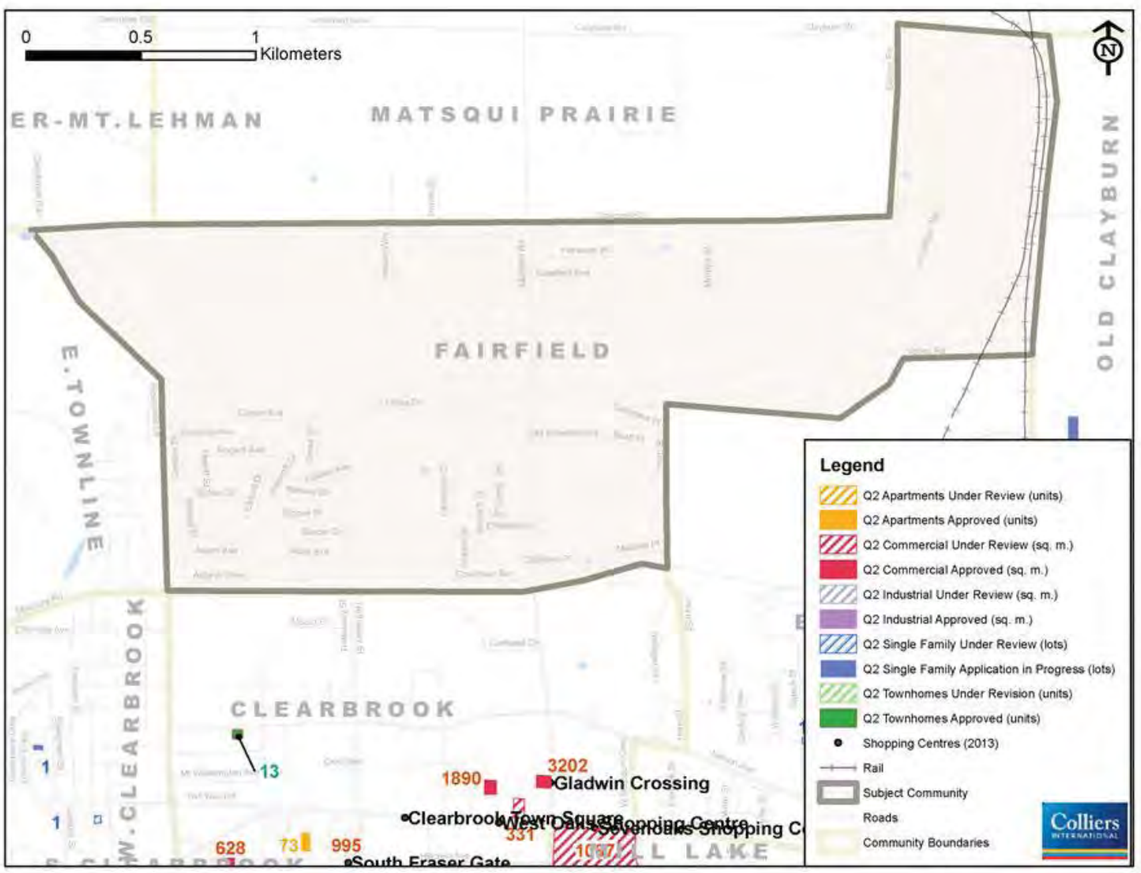


## Fairfield Q1

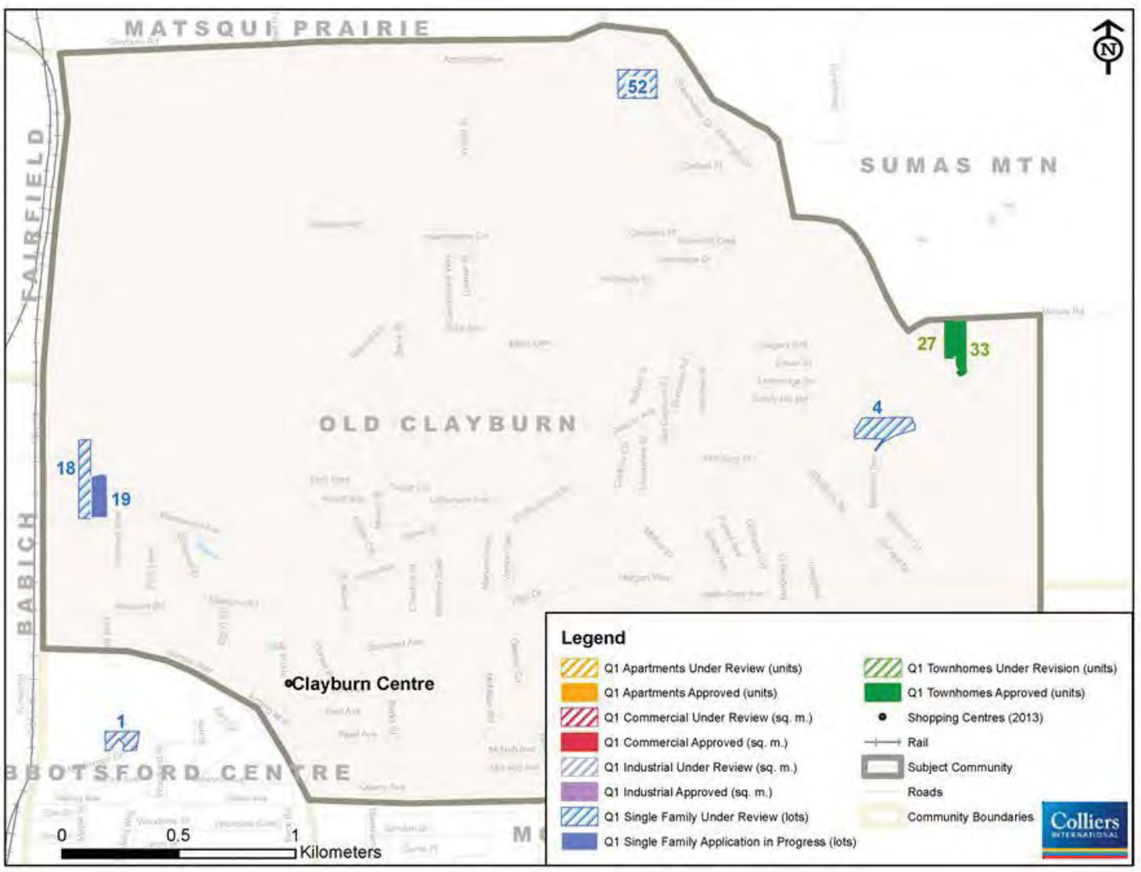





## Fairfield Q2

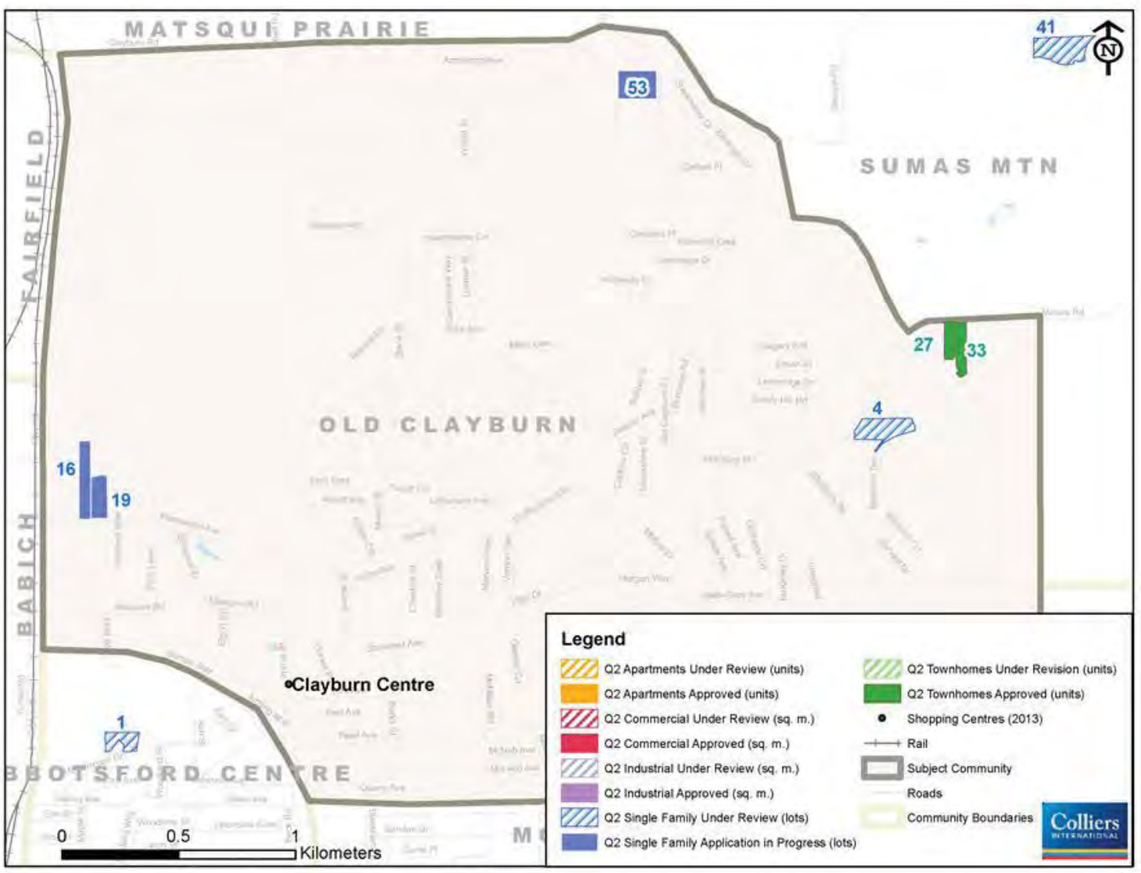


## Old Clayburn Q1

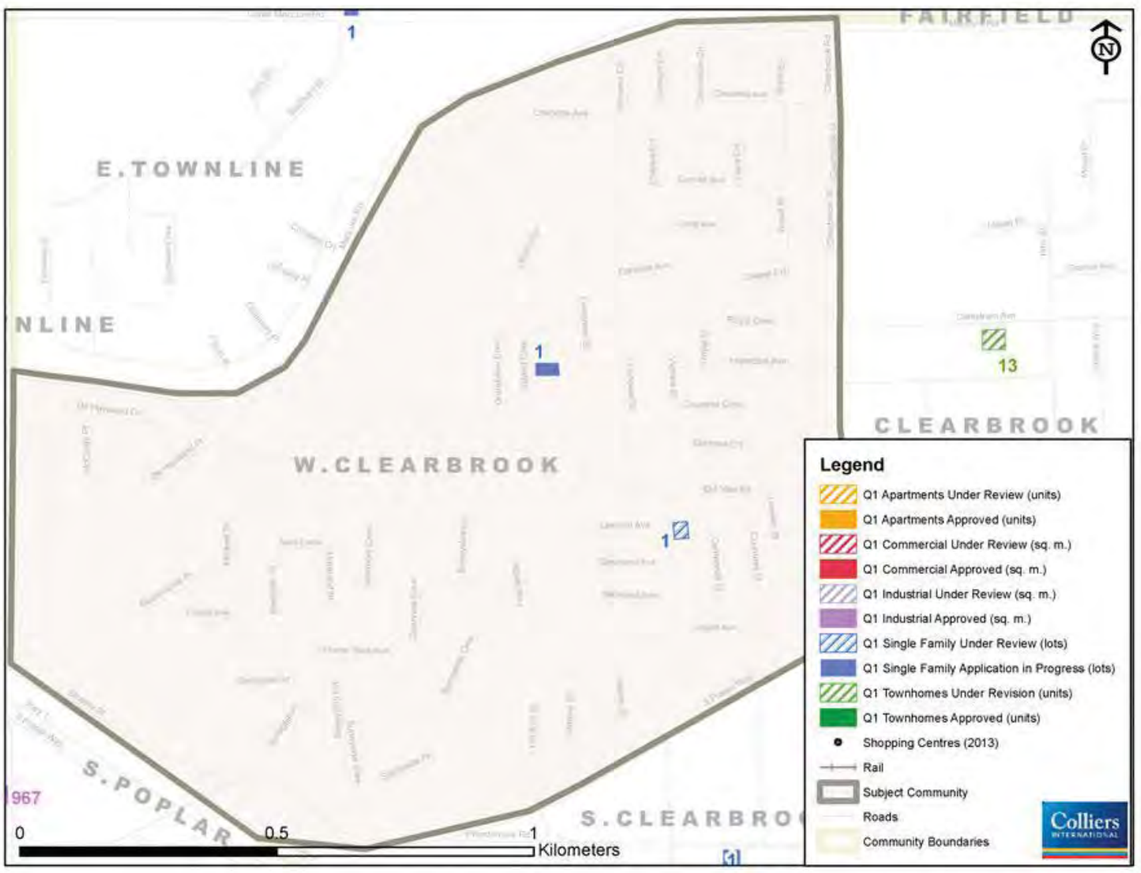





## Old Clayburn Q2

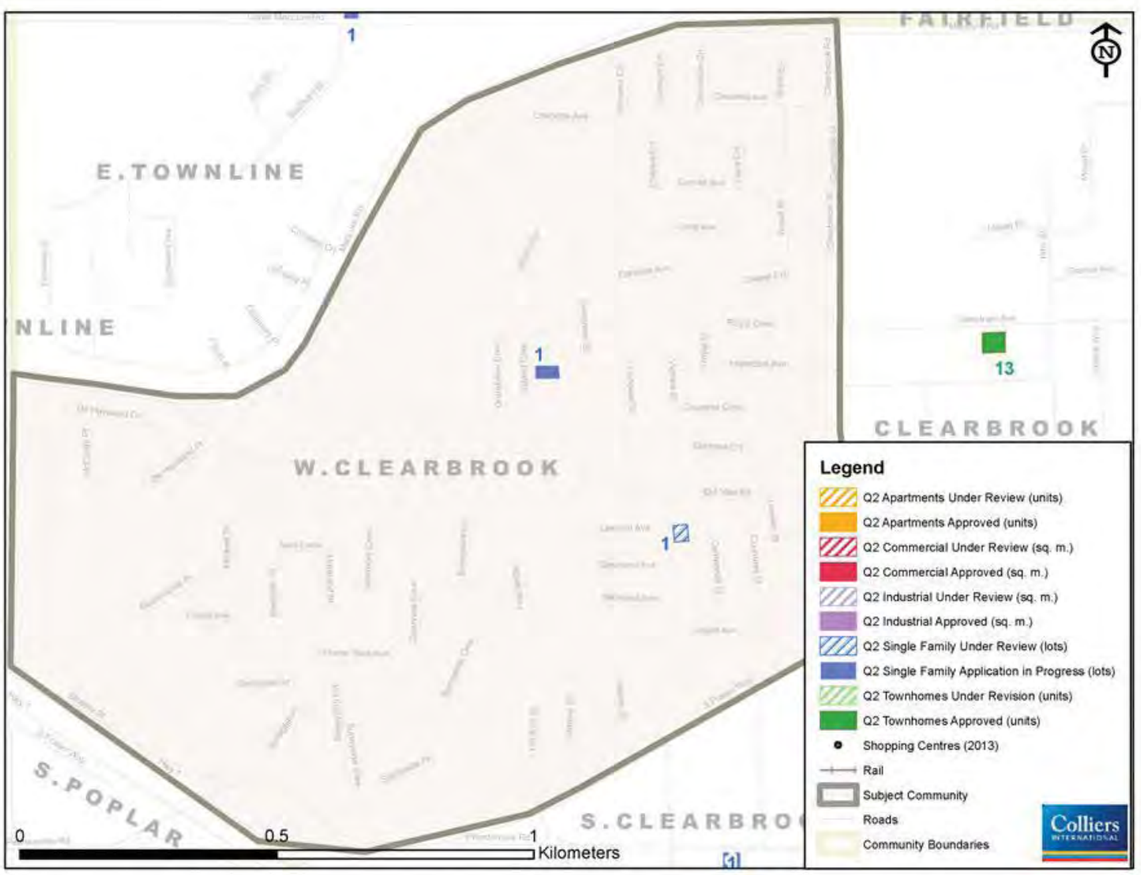


## West Clearbrook Q1

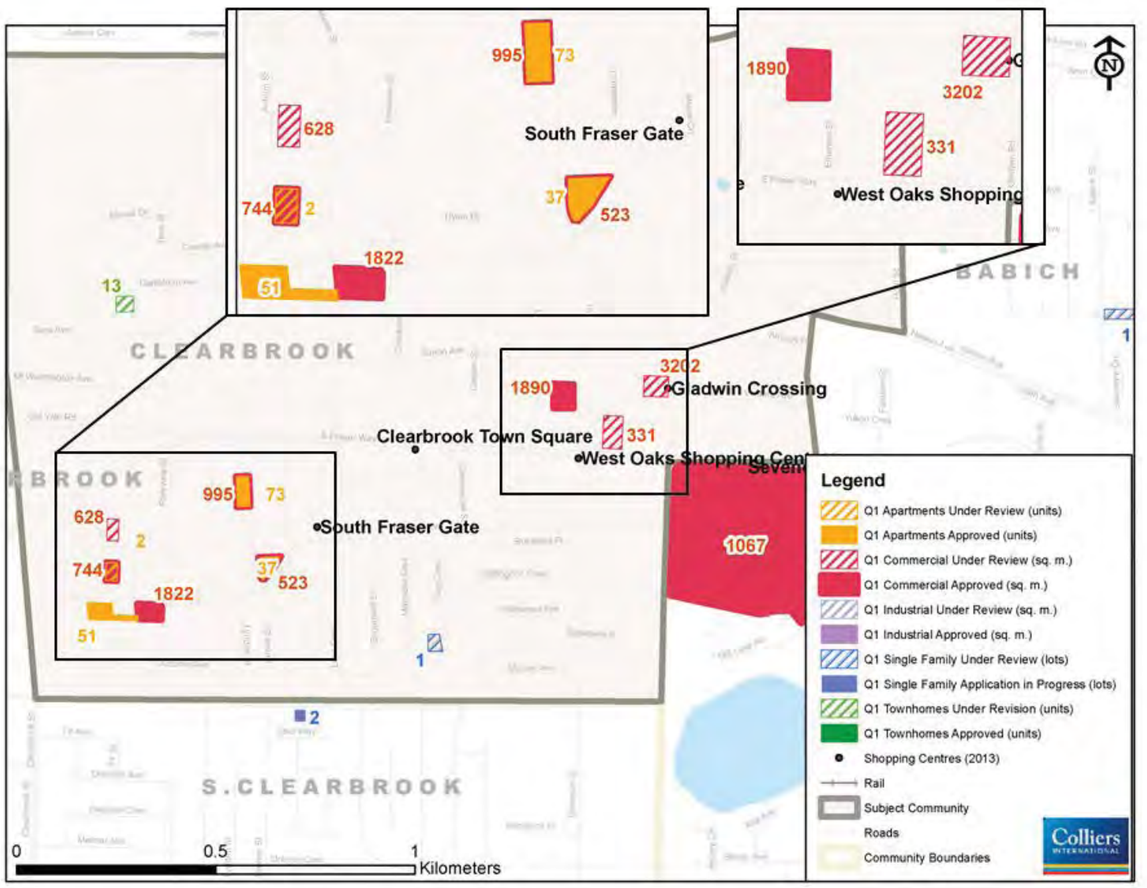





## West Clearbrook Q2

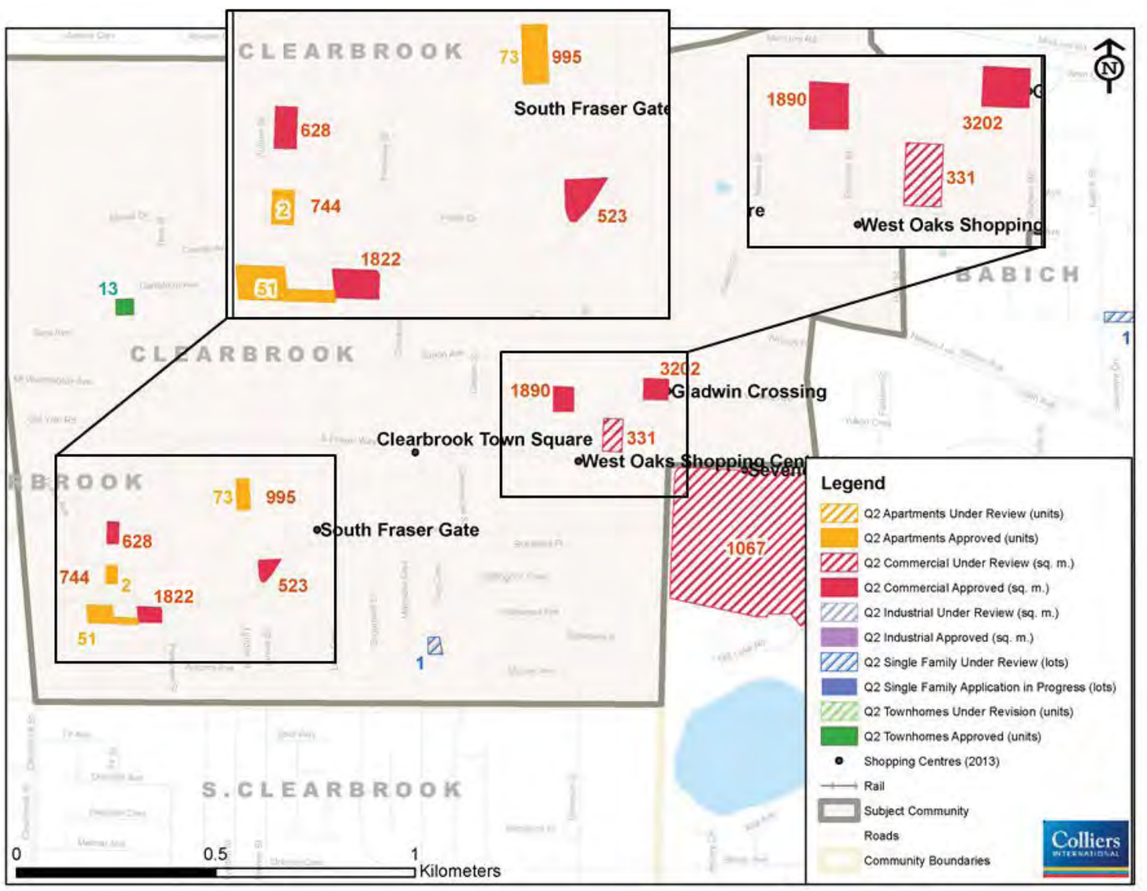


## Clearbrook Centre Q1

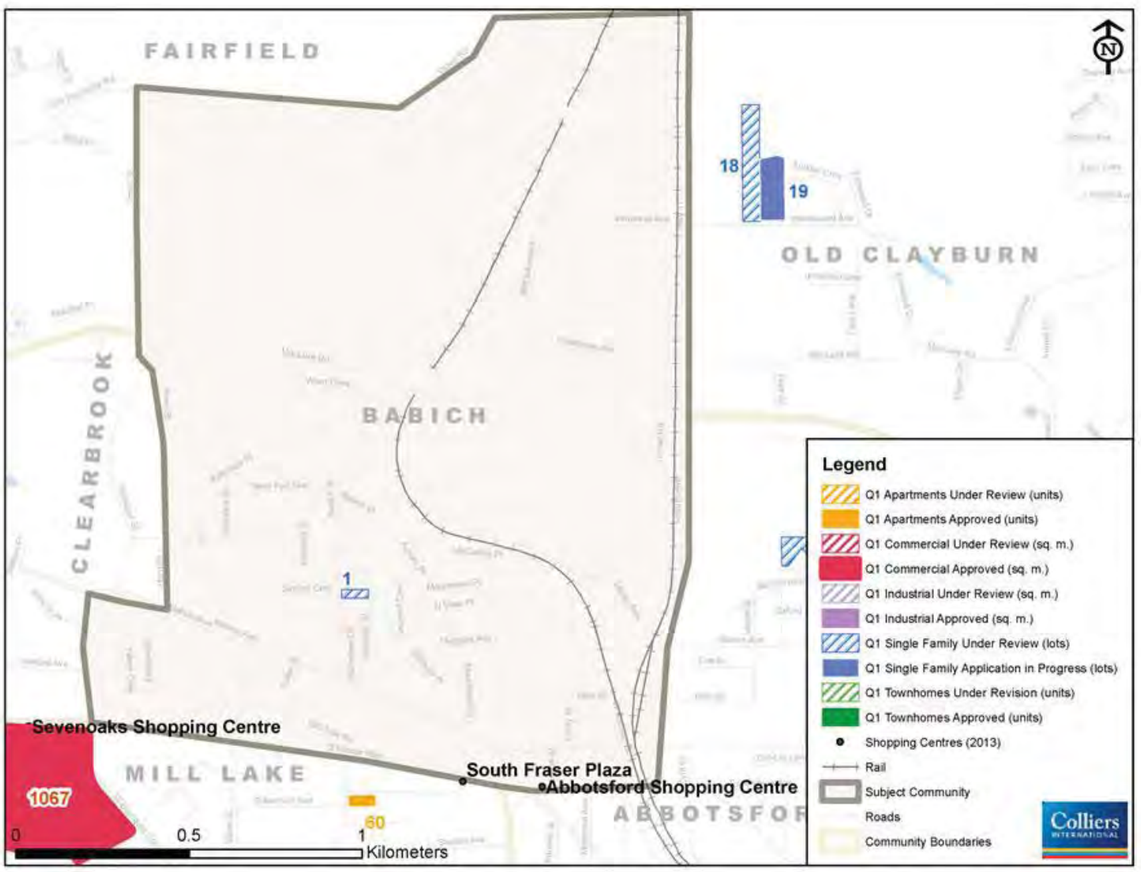





## Clearbrook Centre Q2

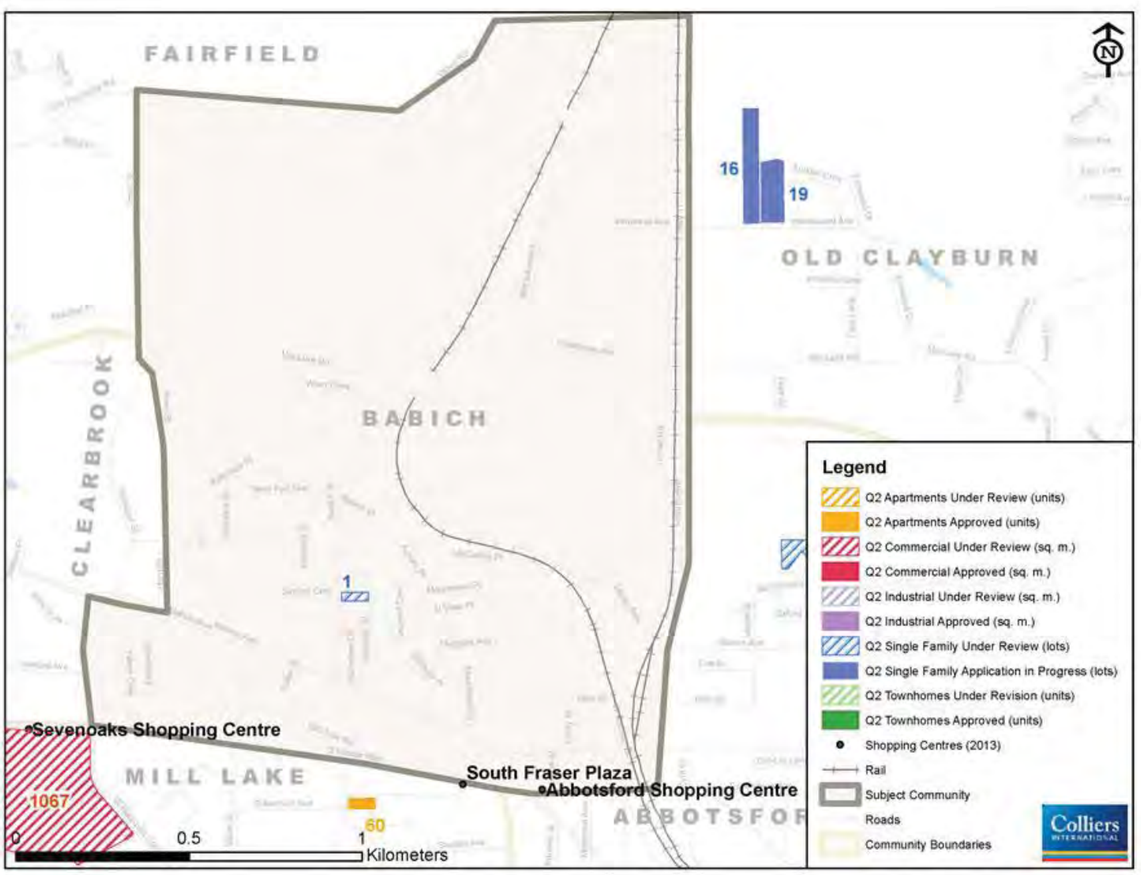


## Babich Q1

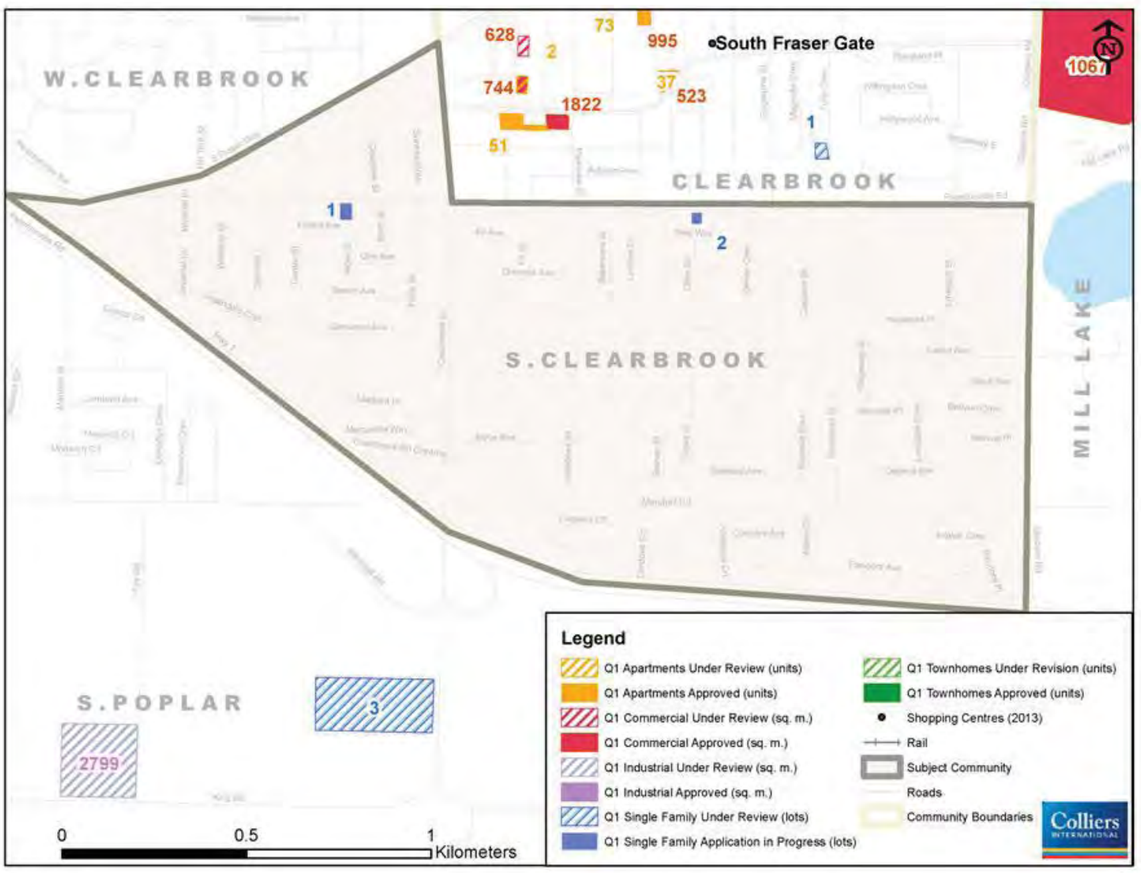





## Babich Q2

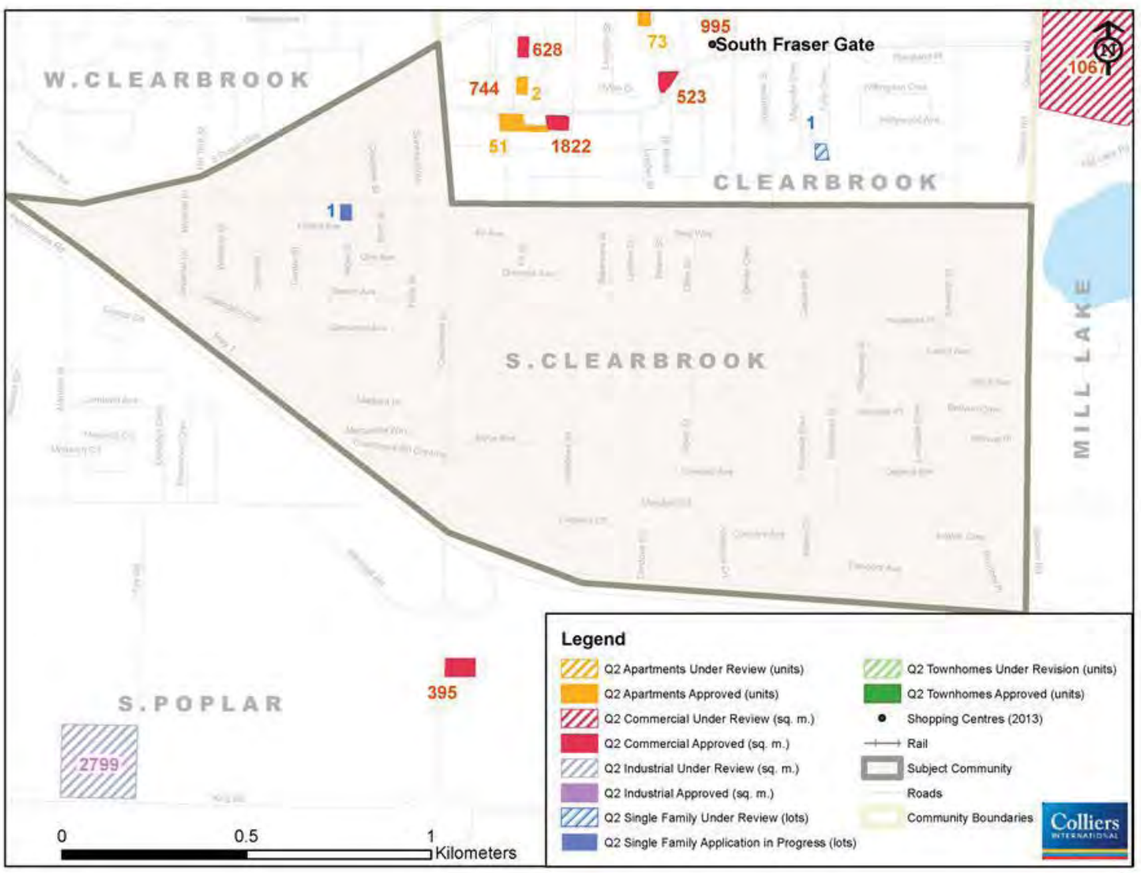


## South Clearbrook Q1

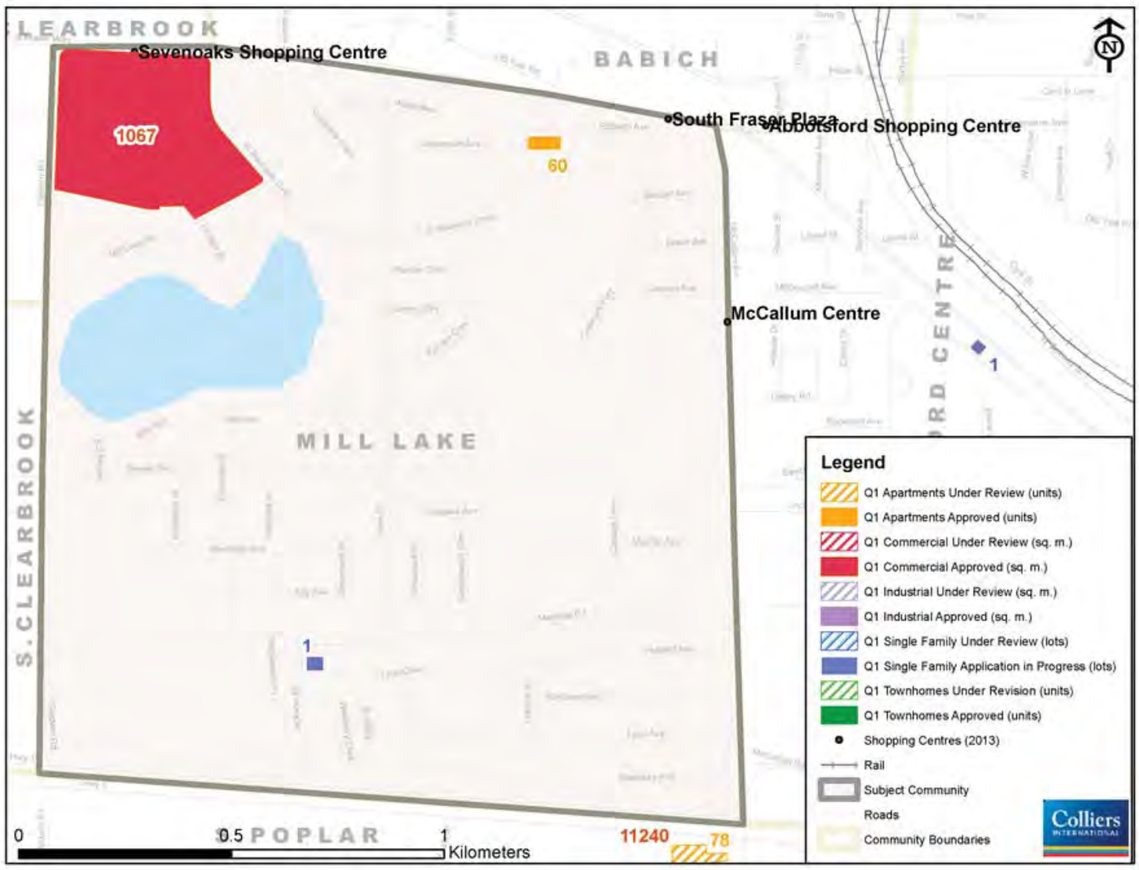





## South Clearbrook Q2

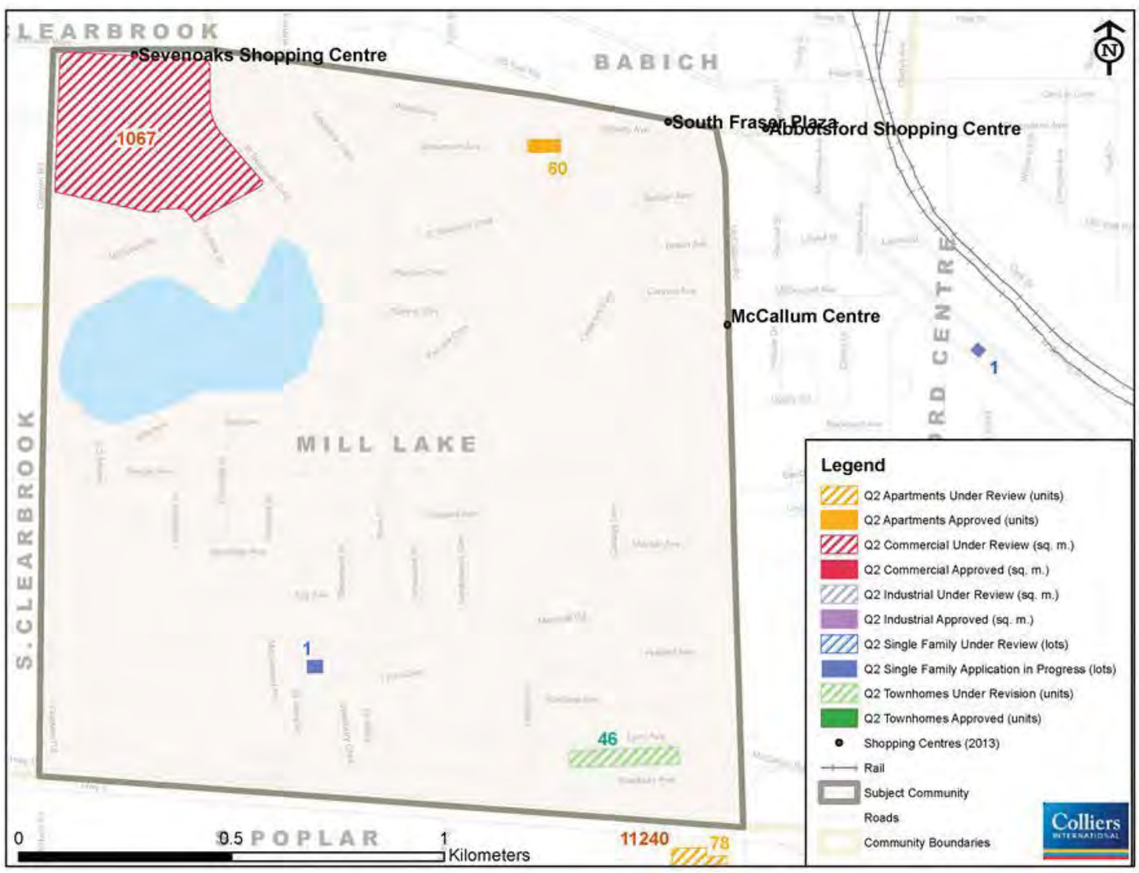


## Mill Lake Q1

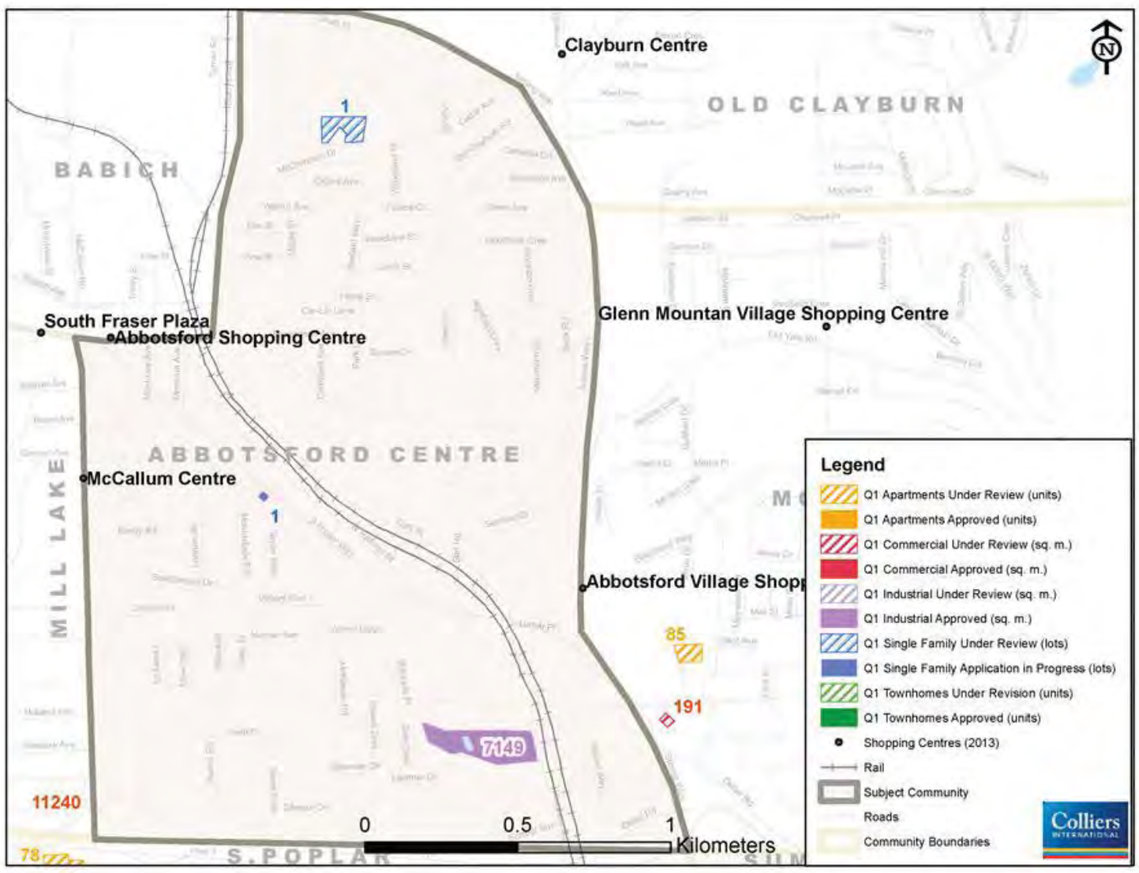





## Mill Lake Q2

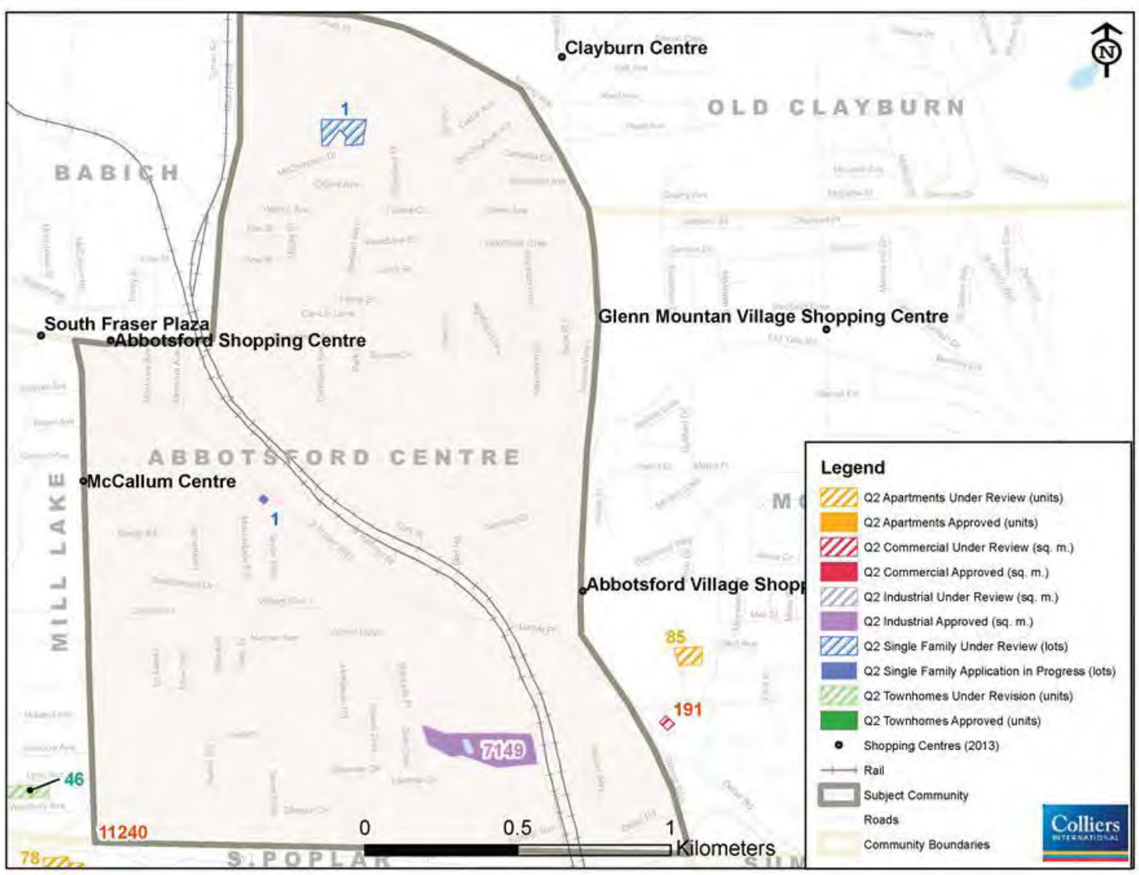


## Abbotsford Centre Q1

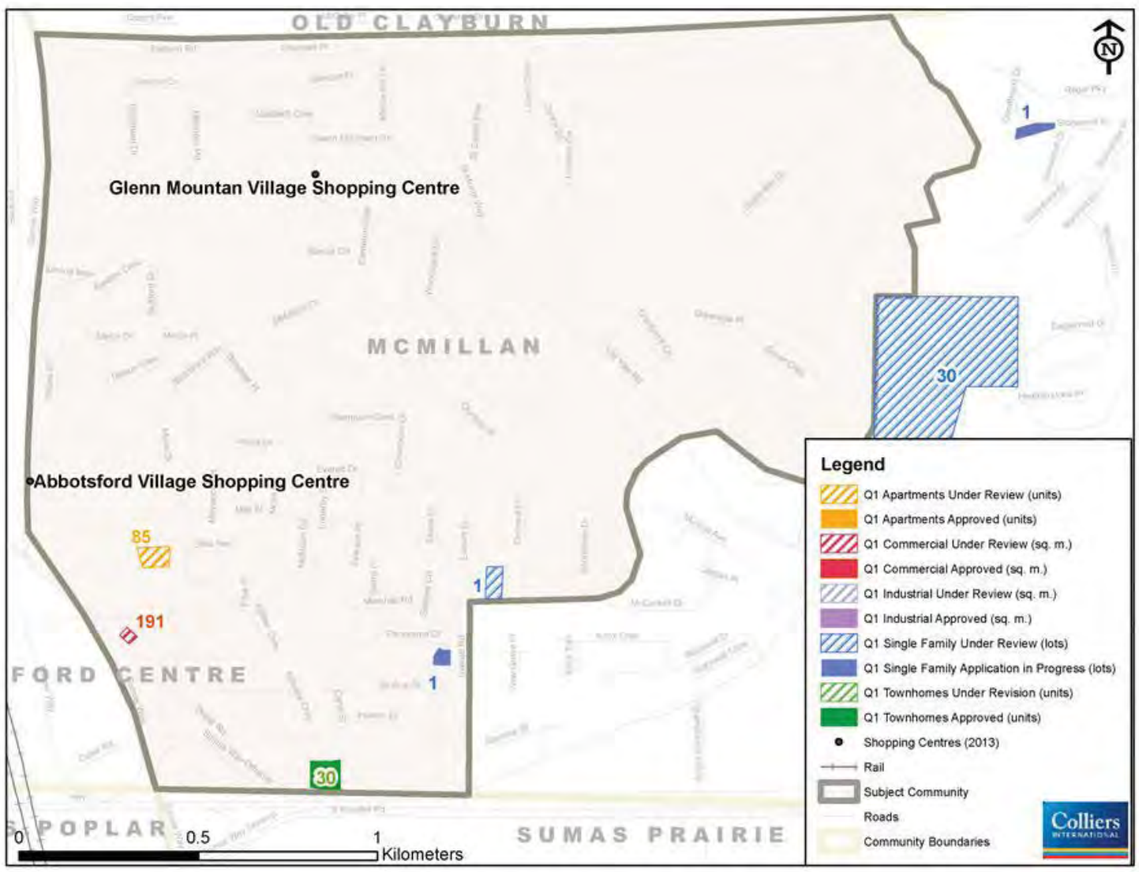





## Abbotsford Centre Q2

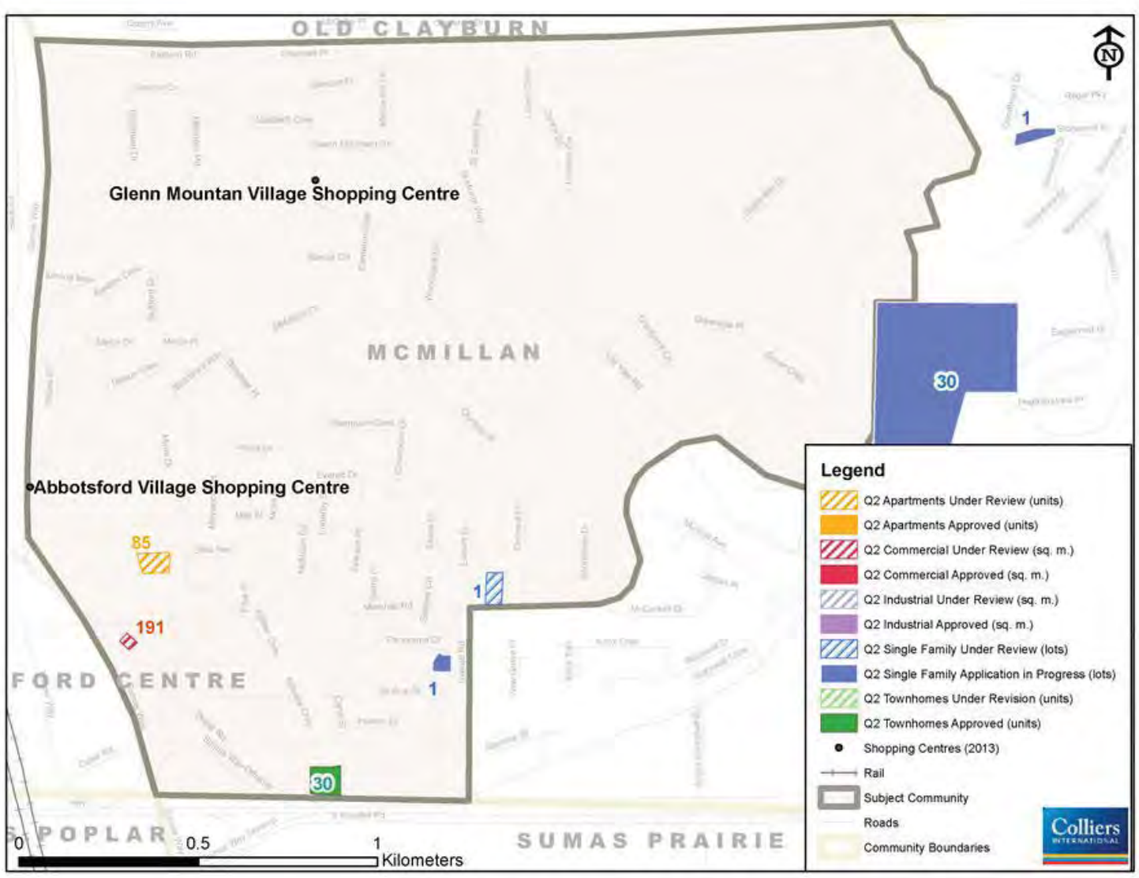


## McMillan Q1

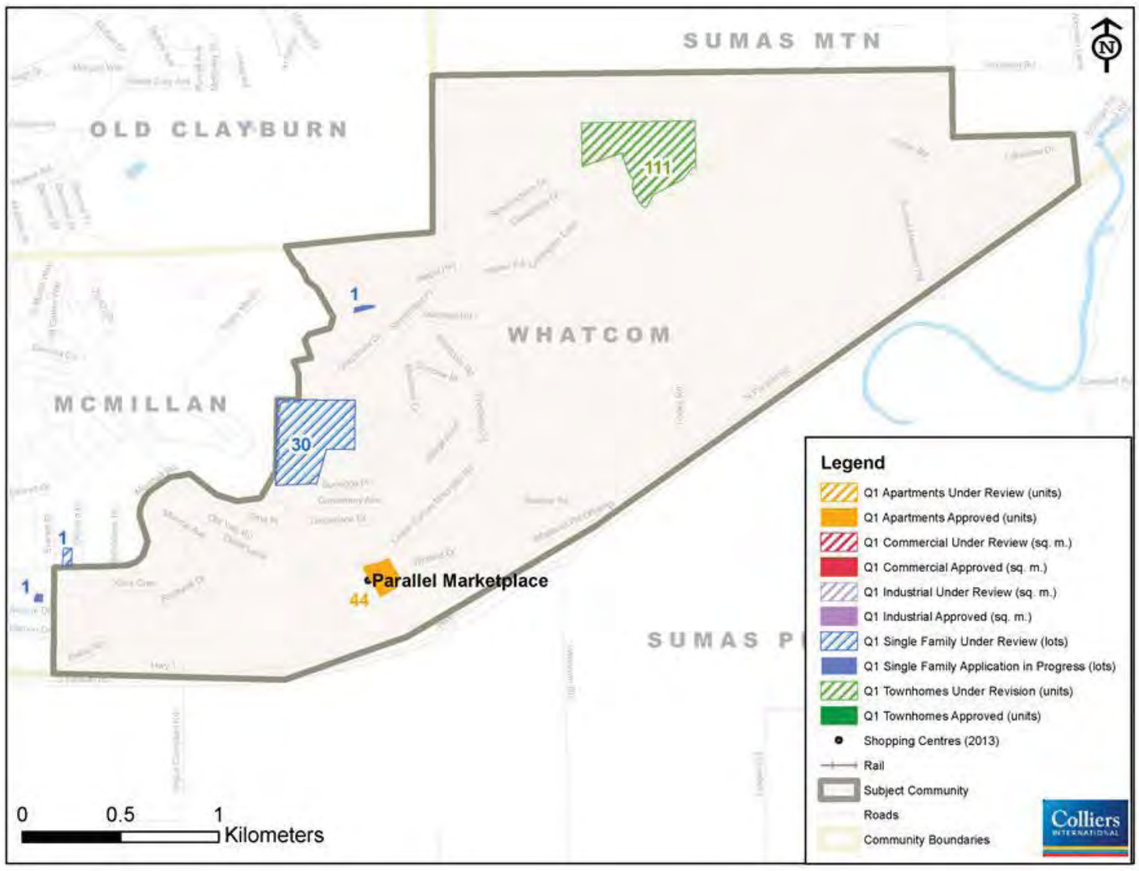





## McMillan Q2

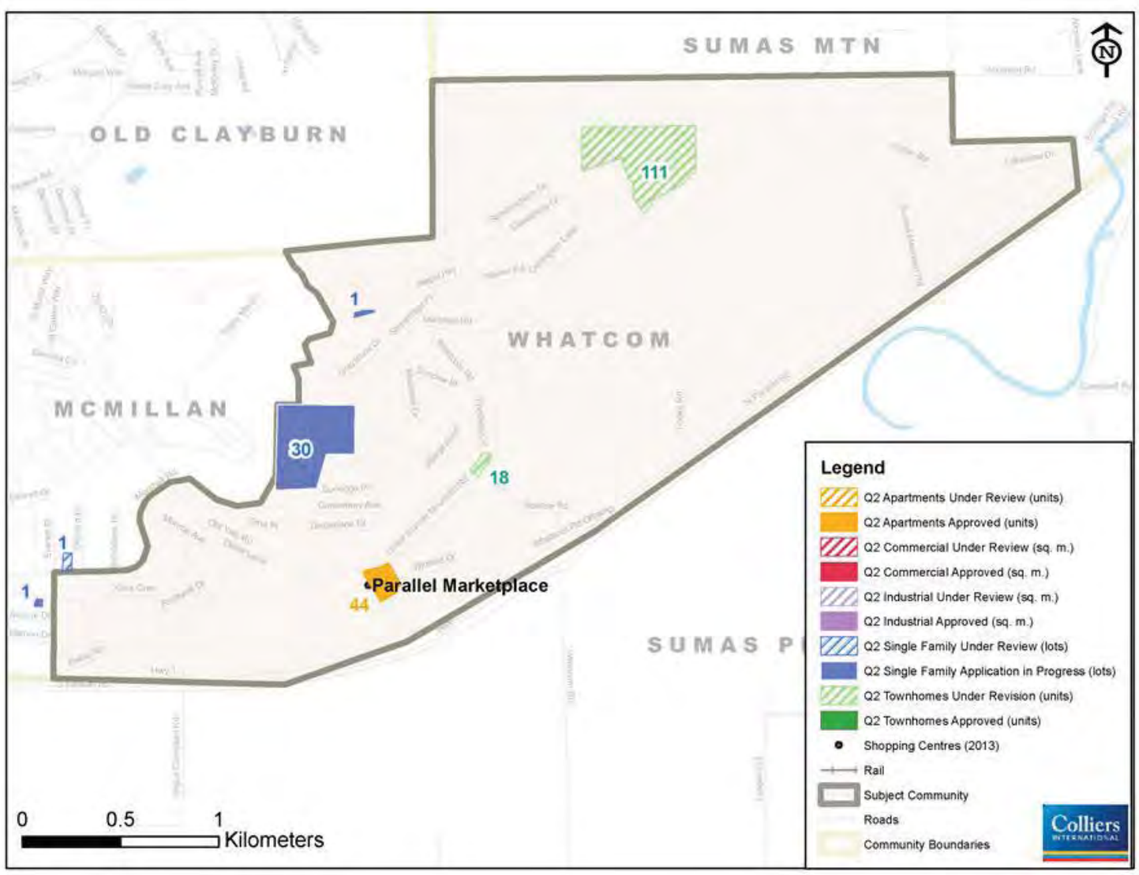


## Whatcom Q1






## Whatcom Q2



# Appendix C – Labour Force by Occupation

| Occupation | Abbotsford Total |
|---|---|
| Sales And Service | 16,880 |
| Trades, transport and equipment operators and related | 14,896 |
| Business, finance and administration | 11,347 |
| Occupations unique to primary industry | 7,672 |
| Management | 6,838 |
| Health occupations | 3,659 |
| Occupations unique to processing, manufacturing and utilities | 4,803 |
| Other occupations | 10,566 |
| **2011 Labour Force 15 years and over** | **76,661** |
| Not in the labour force | 37,365 |

*Source: National Household Survey 2011*



| Occupation | Bradner-Mt.Lehman | Matsqui Prairie | Sumas Mountain | Sumas Prairie | Aberdeen | Old Clayburn | Fairfield | West Townline | East Townline |
|---|---|---|---|---|---|---|---|---|---|
| Sales And Service | 340 | 237 | 578 | 462 | 608 | 2,223 | 1,164 | 1,163 | 1,049 |
| Trades, transport and equipment operators and related | 530 | 396 | 378 | 489 | 972 | 1,539 | 986 | 1,041 | 1,272 |
| Business, finance and administration | 433 | 133 | 578 | 280 | 515 | 1,515 | 742 | 542 | 622 |
| Occupations unique to primary industry | 581 | 475 | 68 | 718 | 612 | 227 | 561 | 855 | 1,248 |
| Management | 263 | 141 | 387 | 96 | 464 | 1,027 | 431 | 386 | 362 |
| Health occupations | 112 | 63 | 134 | 95 | 138 | 563 | 231 | 257 | 210 |
| Occupations unique to processing, manufacturing and utilities | 83 | 78 | 84 | 66 | 236 | 324 | 316 | 541 | 880 |
| Other occupations | 382 | 144 | 665 | 258 | 397 | 1,221 | 722 | 688 | 590 |
| | | | | | | | | | |
| **2011 Labour Force 15 years and over by Occupation** | **2,724** | **1,667** | **2,872** | **2,464** | **3,942** | **8,639** | **5,153** | **5,473** | **6,233** |
| Not in the labour force | 1,182 | 579 | 1,146 | 726 | 1,169 | 3,021 | 2,355 | 2,255 | 2,679 |

| Occupation | Babich | Whatcom | Clearbrook | West Clearbrook | Abbotsford Centre | South Poplar | McMillan | Mill Lake | South Clearbrook |
|---|---|---|---|---|---|---|---|---|---|
| Sales And Service | 861 | 748 | 1,410 | 638 | 1,270 | 944 | 1,202 | 938 | 1,045 |
| Trades, transport and equipment operators and related | 491 | 502 | 1,070 | 583 | 1,008 | 1,170 | 869 | 707 | 893 |
| Business, finance and administration | 497 | 736 | 807 | 374 | 741 | 760 | 983 | 503 | 586 |
| Occupations unique to primary industry | 68 | 102 | 425 | 199 | 177 | 584 | 166 | 148 | 458 |
| Management | 329 | 506 | 380 | 234 | 459 | 320 | 653 | 187 | 213 |
| Health occupations | 155 | 184 | 225 | 105 | 209 | 317 | 318 | 171 | 172 |
| Occupations unique to processing, manufacturing and utilities | 223 | 106 | 312 | 98 | 294 | 332 | 185 | 288 | 357 |
| Other occupations | 587 | 714 | 715 | 337 | 708 | 454 | 808 | 661 | 515 |
| | | | | | | | | | |
| **2011 Labour Force 15 years and over by Occupation** | **3,211** | **3,598** | **5,344** | **2,568** | **4,866** | **4,881** | **5,184** | **3,603** | **4,239** |
| Not in the labour force | 1,820 | 1,658 | 5,571 | 2,048 | 2,155 | 2,388 | 1,883 | 2,819 | 1,911 |



# Appendix D – Employer Surveys

| Name of Organization | Established in | Employees | Expansion plans | Employee complaints regarding Housing Choices | Employee complaints regarding Retail Choices | Employee complaints regarding Transportation |
|---|---|---|---|---|---|---|
| Abbotsford School District | 1946 | 2000 full time, 400-500 part-time | Will likely expand 5-10% of local Abbotsford workforce in the next 5 years. Will likely expand over next 20 years as well. | n/a | Not enough good shopping options, high street was promising, but it doesn't have many stores. People still go to Langley or the US | n/a |
| Correctional Services of Canada | 1960s | 1405 full time, 55 part-time | No expansion plans | Not known | Not known | Not known |
| University of the Fraser Valley | 1974 | 1185 total, 734 full time, 451 part time (other campus location not included) | No expansion per se but projected retirements of employees may lead to employment opportunities. Expansion plans are based on government funding and enrolment. | Limited new developments of single family homes (townhomes and detached), especially executive townhomes. | No complaints, especially with new High Street shopping complex. | Lack of a connected, reliable bus system or alternate transport within Abbotsford that would be comparable to other nearby cities (eg. Tricities, Surrey, Burnaby) |
| Cascade Aerospace | 2000, 14 years in | Approx 630 | Will likely expand | Good selection, | Good shopping with | Biggest complaint |

| | | | |
|---|---|---|---|
| Inc. | operation | 374 | is that there are no connections to Vancouver from Abbotsford. Living in Abbotsford requires a car if you wish to attend anything in Langley, Burnaby or Vancouver, or to get to work. |
| Overwaitea Food Group (Save-On-Foods & Coopers's Foods) | Since 1933 | n/a | n/a |
| Prospera Credit Union | 65 years | 340 full time, 90 part time | No definite plans for expansion. Planning horizon is only 3 years out. |
| | | n/a | Employees are positive about the growth of retail in Abbotsford and the new mall. |
| | | n/a | Have not heard any complaints from employees. |
| 15% in next 5 years, 5% in 5-10 years, 5% in 10-15 years | | n/a | Staff are unhappy with the state the city keeps Auburn Street in – there is garbage and a perceived safety issue. Many employees have to park on Auburn. |



# Appendix E – Detailed Retail Demand Tables

1. Bradner-Mt. Lehman

| 1. Bradner-Mt. Lehman Community<br>Growth in Annual Resident Expenditure Potential (2014-2035) | | | | |
|---|---|---|---|---|
| | | 2014 | | 2035 |
| POPULATION | | 3,950 | | 4,100 |
| INCOME (PDI) | $ | 41,173 | $ | 50,741 |
| TOTAL INCOME POTENTIAL | | $162,631,840 | | $208,037,290 |
| RETAIL SALES / INCOME | | 40.5% | | 40.5% |
| TOTAL RETAIL POTENTIAL | | **$65,805,700** | | **$84,178,100** |
| Motor vehicle and parts dealers [441] | $ | 20,578,939 | $ | 26,324,407 |
| Furniture and home furnishings stores [442] | $ | 2,376,523 | $ | 3,040,029 |
| Electronics and appliance stores [443] | $ | 2,548,625 | $ | 3,260,179 |
| Building material and garden equipment and supplies dealers [444] | $ | 3,703,643 | $ | 4,737,669 |
| Food and beverage stores [445] | $ | 13,528,950 | $ | 17,306,120 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ | 9,988,471 | $ | 12,777,169 |
| Convenience stores [44512] | $ | 747,029 | $ | 955,593 |
| Specialty food stores [4452] | $ | 509,820 | $ | 652,157 |
| Beer, wine and liquor stores [4453] | $ | 2,283,631 | $ | 2,921,202 |
| Health and personal care stores [446] | $ | 3,013,661 | $ | 3,855,050 |
| Gasoline stations [447] | $ | 9,640,311 | $ | 12,331,805 |
| Clothing and clothing accessories stores [448] | $ | 4,112,365 | $ | 5,260,503 |
| Sporting goods, hobby, book and music stores [451] | $ | 1,805,931 | $ | 2,310,132 |
| General merchandise stores [452] | $ | 8,993,910 | $ | 11,504,934 |
| Miscellaneous store retailers [453] | $ | 1,651,195 | $ | 2,112,195 |
| TOTAL - MAJOR RETAIL CATEGORIES (3-Digit NAICS Codes, Some 4-Digit Codes) | **$** | **71,954,000** | **$** | **92,043,000** |
| Source: Colliers International Consulting | | | | |

## 1. Bradner-Mt. Lehman Community
### Projected Resident Sales Capture by Relevant Category

| Major Retail Category | 2014 | 2035 | Incremental Demand |
|---|---|---|---|
| Motor vehicle and parts dealers [441] | $ 20,578,939 | $ 26,324,407 | $ 5,745,467 |
| Furniture and home furnishings stores [442] | $ 2,377,000 | $ 3,040,000 | $ 663,000 |
| Electronics and appliance stores [443] | $ 2,549,000 | $ 3,260,000 | $ 711,000 |
| Building material and garden equipment and supplies dealers [444] | $ 3,704,000 | $ 4,738,000 | $ 1,034,000 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 9,988,000 | $ 12,777,000 | $ 2,789,000 |
| Convenience stores [44512] | $ 747,000 | $ 956,000 | $ 209,000 |
| Specialty food stores [4452] | $ 510,000 | $ 652,000 | $ 142,000 |
| Beer, wine and liquor stores [4453] | $ 2,284,000 | $ 2,921,000 | $ 637,000 |
| Health and personal care stores [446] | $ 3,014,000 | $ 3,855,000 | $ 841,000 |
| Gasoline stations [447] | $ 9,640,000 | $ 12,332,000 | $ 2,692,000 |
| Clothing and clothing accessories stores [448] | $ 4,112,000 | $ 5,261,000 | $ 1,149,000 |
| Sporting goods, hobby, book and music stores [451] | $ 1,806,000 | $ 2,310,000 | $ 504,000 |
| General merchandise stores [452] | $ 8,994,000 | $ 11,505,000 | $ 2,511,000 |
| Miscellaneous store retailers [453] | $ 1,651,000 | $ 2,112,000 | $ 461,000 |
| TOTAL, NET RETAIL EXPENDITURES - Above Categories | **$ 71,955,000** | **$ 92,043,000** | **$ 20,088,000** |

Source: Colliers International Consulting - Rounded to nearest $1,000.

## 1. Bradner-Mt. Lehman Community
### Projected Resident Floor Area Support (nearest 1,000 SF)

| Major Retail Category | Reqm't ($/Sq. Ft.) | Incremental (2014-35) Area Support (sf) |
|---|---|---|
| Motor vehicle and parts dealers [441] | $890 | 6,500 |
| Furniture and home furnishings stores [442] | $440 | 1,500 |
| Electronics and appliance stores [443] | $1,000 | 700 |
| Building material and garden equipment and supplies dealers [444] | $440 | 2,400 |
| Supermarkets and other grocery (except convenience) stores [44511] | $720 | 13,900 |
| Convenience stores [44512] | $890 | 200 |
| Specialty food stores [4452] | $670 | 200 |
| Beer, wine and liquor stores [4453] | $940 | 700 |
| Health and personal care stores [446] | $890 | 900 |
| Clothing and clothing accessories stores [448] | $560 | 2,100 |
| Sporting goods, hobby, book and music stores [451] | $500 | 1,000 |
| General merchandise stores [452] | $500 | 5,000 |
| Miscellaneous store retailers [453] | $560 | 800 |
| NET WARRANTED RETAIL FLOOR AREA - Above Categories (Nearest 100 sf) | | **35,900** |

Source: Colliers International Consulting





## 2. Matsqui Prairie
### Growth in Annual Resident Expenditure Potential (2014-2035)

| | 2014 | 2035 |
|---|---|---|
| POPULATION | 2,130 | 2,200 |
| INCOME (PDI) | $ 24,767 | $ 30,522 |
| TOTAL INCOME POTENTIAL | $52,753,050 | $67,148,990 |
| RETAIL SALES / INCOME | 45.7% | 45.7% |
| TOTAL RETAIL POTENTIAL | **$24,123,000** | **$30,706,000** |
| Motor vehicle and parts dealers [441] | $ 7,543,811 | $ 9,602,465 |
| Furniture and home furnishings stores [442] | $ 871,184 | $ 1,108,924 |
| Electronics and appliance stores [443] | $ 934,273 | $ 1,189,229 |
| Building material and garden equipment and supplies dealers [444] | $ 1,357,679 | $ 1,728,180 |
| Food and beverage stores [445] | $ 4,959,432 | $ 6,312,826 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 3,661,566 | $ 4,660,782 |
| Convenience stores [44512] | $ 273,845 | $ 348,576 |
| Specialty food stores [4452] | $ 186,889 | $ 237,890 |
| Beer, wine and liquor stores [4453] | $ 837,132 | $ 1,065,579 |
| Health and personal care stores [446] | $ 1,104,745 | $ 1,406,223 |
| Gasoline stations [447] | $ 3,533,937 | $ 4,498,324 |
| Clothing and clothing accessories stores [448] | $ 1,507,507 | $ 1,918,896 |
| Sporting goods, hobby, book and music stores [451] | $ 662,017 | $ 842,677 |
| General merchandise stores [452] | $ 3,296,980 | $ 4,196,703 |
| Miscellaneous store retailers [453] | $ 605,294 | $ 770,474 |
| TOTAL - MAJOR RETAIL CATEGORIES (3-Digit NAICS Codes, Some 4-Digit C | **$ 26,377,000** | **$ 33,575,000** |

Source: Colliers International Consulting

## 2. Matsqui Prairie
### Projected Resident Sales Capture by Relevant Category

| Major Retail Category | 2014 | 2035 | Incremental Demand |
|---|---|---|---|
| Motor vehicle and parts dealers [441] | $ 7,543,811 | $ 9,602,465 | $ 2,058,654 |
| Furniture and home furnishings stores [442] | $ 871,000 | $ 1,109,000 | $ 238,000 |
| Electronics and appliance stores [443] | $ 934,000 | $ 1,189,000 | $ 255,000 |
| Building material and garden equipment and supplies dealers [444] | $ 1,358,000 | $ 1,728,000 | $ 370,000 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 3,662,000 | $ 4,661,000 | $ 999,000 |
| Convenience stores [44512] | $ 274,000 | $ 349,000 | $ 75,000 |
| Specialty food stores [4452] | $ 187,000 | $ 238,000 | $ 51,000 |
| Beer, wine and liquor stores [4453] | $ 837,000 | $ 1,066,000 | $ 229,000 |
| Health and personal care stores [446] | $ 1,105,000 | $ 1,406,000 | $ 301,000 |
| Gasoline stations [447] | $ 3,534,000 | $ 4,498,000 | $ 964,000 |
| Clothing and clothing accessories stores [448] | $ 1,508,000 | $ 1,919,000 | $ 411,000 |
| Sporting goods, hobby, book and music stores [451] | $ 662,000 | $ 843,000 | $ 181,000 |
| General merchandise stores [452] | $ 3,297,000 | $ 4,197,000 | $ 900,000 |
| Miscellaneous store retailers [453] | $ 605,000 | $ 770,000 | $ 165,000 |
| TOTAL, NET RETAIL EXPENDITURES - Above Categories | **$ 26,378,000** | **$ 33,575,000** | **$ 7,198,000** |

Source: Colliers International Consulting - Rounded to nearest $1,000.

## 2. Matsqui Prairie
### Projected Resident Floor Area Support (nearest 1,000 SF)

| Major Retail Category | Reqm't ($/Sq. Ft.) | Incremental (2014-35) Area Support (sf) |
|---|---|---|
| Motor vehicle and parts dealers [441] | $890 | 2,300 |
| Furniture and home furnishings stores [442] | $440 | 500 |
| Electronics and appliance stores [443] | $1,000 | 300 |
| Building material and garden equipment and supplies dealers [444] | $440 | 800 |
| Supermarkets and other grocery (except convenience) stores [44511] | $720 | 5,100 |
| Convenience stores [44512] | $890 | 100 |
| Specialty food stores [4452] | $670 | 100 |
| Beer, wine and liquor stores [4453] | $940 | 200 |
| Health and personal care stores [446] | $890 | 300 |
| Clothing and clothing accessories stores [448] | $560 | 700 |
| Sporting goods, hobby, book and music stores [451] | $500 | 400 |
| General merchandise stores [452] | $500 | 1,800 |
| Miscellaneous store retailers [453] | $560 | 300 |
| NET WARRANTED RETAIL FLOOR AREA - Above Categories (Nearest 100 sf) | | **12,900** |

Source: Colliers International Consulting





## 3. Sumas Mountain
### Growth in Annual Resident Expenditure Potential (2014-2035)

| | 2014 | 2035 |
|---|---|---|
| POPULATION | 4,250 | 13,600 |
| INCOME (PDI) | $ 39,081 | $ 48,164 |
| TOTAL INCOME POTENTIAL | $166,096,050 | $655,025,390 |
| RETAIL SALES / INCOME | 41.1% | 41.1% |
| TOTAL RETAIL POTENTIAL | **$68,322,200** | **$269,439,000** |
| Motor vehicle and parts dealers [441] | $ 21,365,906 | $ 84,259,704 |
| Furniture and home furnishings stores [442] | $ 2,467,405 | $ 9,730,587 |
| Electronics and appliance stores [443] | $ 2,646,087 | $ 10,435,249 |
| Building material and garden equipment and supplies dealers [444] | $ 3,845,276 | $ 15,164,430 |
| Food and beverage stores [445] | $ 14,046,316 | $ 55,393,785 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 10,370,444 | $ 40,897,426 |
| Convenience stores [44512] | $ 775,596 | $ 3,058,682 |
| Specialty food stores [4452] | $ 529,316 | $ 2,087,437 |
| Beer, wine and liquor stores [4453] | $ 2,370,960 | $ 9,350,243 |
| Health and personal care stores [446] | $ 3,128,907 | $ 12,339,323 |
| Gasoline stations [447] | $ 10,008,969 | $ 39,471,895 |
| Clothing and clothing accessories stores [448] | $ 4,269,628 | $ 16,837,927 |
| Sporting goods, hobby, book and music stores [451] | $ 1,874,992 | $ 7,394,318 |
| General merchandise stores [452] | $ 9,337,849 | $ 36,825,231 |
| Miscellaneous store retailers [453] | $ 1,714,339 | $ 6,760,758 |
| TOTAL - MAJOR RETAIL CATEGORIES (3-Digit NAICS Codes, Some 4-Digit Co | **$ 74,706,000** | **$ 294,613,000** |

Source: Colliers International Consulting

## 3. Sumas Mountain
### Projected Resident Sales Capture by Relevant Category

| Major Retail Category | 2014 | 2035 | Incremental Demand |
|---|---|---|---|
| Motor vehicle and parts dealers [441] | $ 21,365,906 | $ 84,259,704 | $ 62,893,798 |
| Furniture and home furnishings stores [442] | $ 2,467,000 | $ 9,731,000 | $ 7,264,000 |
| Electronics and appliance stores [443] | $ 2,646,000 | $ 10,435,000 | $ 7,789,000 |
| Building material and garden equipment and supplies dealers [444] | $ 3,845,000 | $ 15,164,000 | $ 11,319,000 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 10,370,000 | $ 40,897,000 | $ 30,527,000 |
| Convenience stores [44512] | $ 776,000 | $ 3,059,000 | $ 2,283,000 |
| Specialty food stores [4452] | $ 529,000 | $ 2,087,000 | $ 1,558,000 |
| Beer, wine and liquor stores [4453] | $ 2,371,000 | $ 9,350,000 | $ 6,979,000 |
| Health and personal care stores [446] | $ 3,129,000 | $ 12,339,000 | $ 9,210,000 |
| Gasoline stations [447] | $ 10,009,000 | $ 39,472,000 | $ 29,463,000 |
| Clothing and clothing accessories stores [448] | $ 4,270,000 | $ 16,838,000 | $ 12,568,000 |
| Sporting goods, hobby, book and music stores [451] | $ 1,875,000 | $ 7,394,000 | $ 5,519,000 |
| General merchandise stores [452] | $ 9,338,000 | $ 36,825,000 | $ 27,487,000 |
| Miscellaneous store retailers [453] | $ 1,714,000 | $ 6,761,000 | $ 5,047,000 |
| TOTAL, NET RETAIL EXPENDITURES - Above Categories | **$ 74,705,000** | **$ 294,612,000** | **$ 219,907,000** |

Source: Colliers International Consulting - Rounded to nearest $1,000.

## 3. Sumas Mountain
### Projected Resident Floor Area Support (nearest 1,000 SF)

| Major Retail Category | Reqm't ($/Sq. Ft.) | Incremental (2014-35) Area Support (sf) |
|---|---|---|
| Motor vehicle and parts dealers [441] | $890 | 70,700 |
| Furniture and home furnishings stores [442] | $440 | 16,500 |
| Electronics and appliance stores [443] | $1,000 | 7,800 |
| Building material and garden equipment and supplies dealers [444] | $440 | 25,700 |
| Supermarkets and other grocery (except convenience) stores [44511] | $720 | 14,400 |
| Convenience stores [44512] | $890 | 2,600 |
| Specialty food stores [4452] | $670 | 2,300 |
| Beer, wine and liquor stores [4453] | $940 | 7,400 |
| Health and personal care stores [446] | $890 | 10,300 |
| Clothing and clothing accessories stores [448] | $560 | 22,400 |
| Sporting goods, hobby, book and music stores [451] | $500 | 11,000 |
| General merchandise stores [452] | $500 | 55,000 |
| Miscellaneous store retailers [453] | $560 | 9,000 |
| NET WARRANTED RETAIL FLOOR AREA - Above Categories (Nearest 100 sf) | | **255,100** |

Source: Colliers International Consulting





## 4. Sumas Prairie
### Growth in Annual Resident Expenditure Potential (2014-2035)

| | 2014 | 2035 |
|---|---|---|
| POPULATION | 3,460 | 3,500 |
| INCOME (PDI) | $ 28,306 | $ 34,884 |
| TOTAL INCOME POTENTIAL | $97,937,270 | $122,092,440 |
| RETAIL SALES / INCOME | 44.6% | 44.6% |
| TOTAL RETAIL POTENTIAL | **$43,672,600** | **$54,444,000** |
| Motor vehicle and parts dealers [441] | $ 13,657,415 | $ 17,025,877 |
| Furniture and home furnishings stores [442] | $ 1,577,203 | $ 1,966,204 |
| Electronics and appliance stores [443] | $ 1,691,420 | $ 2,108,591 |
| Building material and garden equipment and supplies dealers [444] | $ 2,457,959 | $ 3,064,190 |
| Food and beverage stores [445] | $ 8,978,621 | $ 11,193,106 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 6,628,947 | $ 8,263,909 |
| Convenience stores [44512] | $ 495,773 | $ 618,050 |
| Specialty food stores [4452] | $ 338,347 | $ 421,797 |
| Beer, wine and liquor stores [4453] | $ 1,515,554 | $ 1,889,350 |
| Health and personal care stores [446] | $ 2,000,046 | $ 2,493,336 |
| Gasoline stations [447] | $ 6,397,887 | $ 7,975,860 |
| Clothing and clothing accessories stores [448] | $ 2,729,212 | $ 3,402,344 |
| Sporting goods, hobby, book and music stores [451] | $ 1,198,524 | $ 1,494,128 |
| General merchandise stores [452] | $ 5,968,897 | $ 7,441,064 |
| Miscellaneous store retailers [453] | $ 1,095,832 | $ 1,366,108 |
| TOTAL - MAJOR RETAIL CATEGORIES (3-Digit NAICS Codes, Some 4-Digit Codes) | **$ 47,753,000** | **$ 59,531,000** |

Source: Colliers International Consulting

## 4. Sumas Prairie
### Projected Resident Sales Capture by Relevant Category

| Major Retail Category | 2014 | 2035 | Incremental Demand |
|---|---|---|---|
| Motor vehicle and parts dealers [441] | $ 13,657,415 | $ 17,025,877 | $ 3,368,462 |
| Furniture and home furnishings stores [442] | $ 1,577,000 | $ 1,966,000 | $ 389,000 |
| Electronics and appliance stores [443] | $ 1,691,000 | $ 2,109,000 | $ 418,000 |
| Building material and garden equipment and supplies dealers [444] | $ 2,458,000 | $ 3,064,000 | $ 606,000 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 6,629,000 | $ 8,264,000 | $ 1,635,000 |
| Convenience stores [44512] | $ 496,000 | $ 618,000 | $ 122,000 |
| Specialty food stores [4452] | $ 338,000 | $ 422,000 | $ 84,000 |
| Beer, wine and liquor stores [4453] | $ 1,516,000 | $ 1,889,000 | $ 373,000 |
| Health and personal care stores [446] | $ 2,000,000 | $ 2,493,000 | $ 493,000 |
| Gasoline stations [447] | $ 6,398,000 | $ 7,976,000 | $ 1,578,000 |
| Clothing and clothing accessories stores [448] | $ 2,729,000 | $ 3,402,000 | $ 673,000 |
| Sporting goods, hobby, book and music stores [451] | $ 1,199,000 | $ 1,494,000 | $ 295,000 |
| General merchandise stores [452] | $ 5,969,000 | $ 7,441,000 | $ 1,472,000 |
| Miscellaneous store retailers [453] | $ 1,096,000 | $ 1,366,000 | $ 270,000 |
| TOTAL, NET RETAIL EXPENDITURES - Above Categories | **$ 47,753,000** | **$ 59,530,000** | **$ 11,776,000** |

Source: Colliers International Consulting - Rounded to nearest $1,000.

## 4. Sumas Prairie
### Projected Resident Floor Area Support (nearest 1,000 SF)

| Major Retail Category | Reqm't ($/Sq. Ft.) | Incremental (2014-35) Area Support (sf) |
|---|---|---|
| Motor vehicle and parts dealers [441] | $890 | 3,800 |
| Furniture and home furnishings stores [442] | $440 | 900 |
| Electronics and appliance stores [443] | $1,000 | 400 |
| Building material and garden equipment and supplies dealers [444] | $440 | 1,400 |
| Supermarkets and other grocery (except convenience) stores [44511] | $720 | 9,200 |
| Convenience stores [44512] | $890 | 100 |
| Specialty food stores [4452] | $670 | 100 |
| Beer, wine and liquor stores [4453] | $940 | 400 |
| Health and personal care stores [446] | $890 | 600 |
| Clothing and clothing accessories stores [448] | $560 | 1,200 |
| Sporting goods, hobby, book and music stores [451] | $500 | 600 |
| General merchandise stores [452] | $500 | 2,900 |
| Miscellaneous store retailers [453] | $560 | 500 |
| NET WARRANTED RETAIL FLOOR AREA - Above Categories (Nearest 100 sf) | | **22,100** |

Source: Colliers International Consulting





## 5. South Poplar
### Growth in Annual Resident Expenditure Potential (2014-2035)

| | 2014 | 2035 |
|---|---|---|
| POPULATION | 8,080 | 13,000 |
| INCOME (PDI) | $ 29,881 | $ 36,825 |
| TOTAL INCOME POTENTIAL | $241,437,790 | $478,724,990 |
| RETAIL SALES / INCOME | 44.1% | 44.1% |
| TOTAL RETAIL POTENTIAL | **$106,442,400** | **$211,054,900** |
| Motor vehicle and parts dealers [441] | $ 33,286,960 | $ 66,001,668 |
| Furniture and home furnishings stores [442] | $ 3,844,087 | $ 7,622,089 |
| Electronics and appliance stores [443] | $ 4,122,465 | $ 8,174,059 |
| Building material and garden equipment and supplies dealers [444] | $ 5,990,737 | $ 11,878,485 |
| Food and beverage stores [445] | $ 21,883,422 | $ 43,390,637 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 16,156,608 | $ 32,035,460 |
| Convenience stores [44512] | $ 1,208,338 | $ 2,395,904 |
| Specialty food stores [4452] | $ 824,646 | $ 1,635,116 |
| Beer, wine and liquor stores [4453] | $ 3,693,832 | $ 7,324,161 |
| Health and personal care stores [446] | $ 4,874,673 | $ 9,665,544 |
| Gasoline stations [447] | $ 15,593,449 | $ 30,918,823 |
| Clothing and clothing accessories stores [448] | $ 6,651,856 | $ 13,189,356 |
| Sporting goods, hobby, book and music stores [451] | $ 2,921,140 | $ 5,792,061 |
| General merchandise stores [452] | $ 14,547,879 | $ 28,845,658 |
| Miscellaneous store retailers [453] | $ 2,670,850 | $ 5,295,785 |
| TOTAL - MAJOR RETAIL CATEGORIES (3-Digit NAICS Codes, Some 4-Digit C | **$ 116,388,000** | **$ 230,774,000** |

Source: Colliers International Consulting

## 5. South Poplar
### Projected Resident Sales Capture by Relevant Category

| Major Retail Category | 2014 | 2035 | Incremental Demand |
|---|---|---|---|
| Motor vehicle and parts dealers [441] | $ 33,286,960 | $ 66,001,668 | $ 32,714,708 |
| Furniture and home furnishings stores [442] | $ 3,844,000 | $ 7,622,000 | $ 3,778,000 |
| Electronics and appliance stores [443] | $ 4,122,000 | $ 8,174,000 | $ 4,052,000 |
| Building material and garden equipment and supplies dealers [444] | $ 5,991,000 | $ 11,878,000 | $ 5,887,000 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 16,157,000 | $ 32,035,000 | $ 15,878,000 |
| Convenience stores [44512] | $ 1,208,000 | $ 2,396,000 | $ 1,188,000 |
| Specialty food stores [4452] | $ 825,000 | $ 1,635,000 | $ 810,000 |
| Beer, wine and liquor stores [4453] | $ 3,694,000 | $ 7,324,000 | $ 3,630,000 |
| Health and personal care stores [446] | $ 4,875,000 | $ 9,666,000 | $ 4,791,000 |
| Gasoline stations [447] | $ 15,593,000 | $ 30,919,000 | $ 15,326,000 |
| Clothing and clothing accessories stores [448] | $ 6,652,000 | $ 13,189,000 | $ 6,537,000 |
| Sporting goods, hobby, book and music stores [451] | $ 2,921,000 | $ 5,792,000 | $ 2,871,000 |
| General merchandise stores [452] | $ 14,548,000 | $ 28,846,000 | $ 14,298,000 |
| Miscellaneous store retailers [453] | $ 2,671,000 | $ 5,296,000 | $ 2,625,000 |
| **TOTAL, NET RETAIL EXPENDITURES - Above Categories** | **$ 116,388,000** | **$ 230,774,000** | **$ 114,386,000** |

Source: Colliers International Consulting - Rounded to nearest $1,000.

## 5. South Poplar
### Projected Resident Floor Area Support (nearest 1,000 SF)

| Major Retail Category | Reqm't ($/Sq. Ft.) | Incremental (2014-35) Area Support (sf) |
|---|---|---|
| Motor vehicle and parts dealers [441] | $890 | 36,800 |
| Furniture and home furnishings stores [442] | $440 | 8,600 |
| Electronics and appliance stores [443] | $1,000 | 4,100 |
| Building material and garden equipment and supplies dealers [444] | $440 | 13,400 |
| Supermarkets and other grocery (except convenience) stores [44511] | $720 | 22,400 |
| Convenience stores [44512] | $890 | 1,300 |
| Specialty food stores [4452] | $670 | 1,200 |
| Beer, wine and liquor stores [4453] | $940 | 3,900 |
| Health and personal care stores [446] | $890 | 5,400 |
| Clothing and clothing accessories stores [448] | $560 | 11,700 |
| Sporting goods, hobby, book and music stores [451] | $500 | 5,700 |
| General merchandise stores [452] | $500 | 28,600 |
| Miscellaneous store retailers [453] | $560 | 4,700 |
| **NET WARRANTED RETAIL FLOOR AREA - Above Categories (Nearest 100 sf)** | | **147,800** |

Source: Colliers International Consulting





## 6. Aberdeen
### Growth in Annual Resident Expenditure Potential (2014-2035)

| | 2014 | 2035 |
|---|---|---|
| POPULATION | 6,305 | 7,900 |
| INCOME (PDI) | $ 27,195 | $ 33,515 |
| TOTAL INCOME POTENTIAL | $171,466,360 | $264,770,610 |
| RETAIL SALES / INCOME | 44.9% | 44.9% |
| **TOTAL RETAIL POTENTIAL** | **$77,072,100** | **$119,011,200** |
| Motor vehicle and parts dealers [441] | $ 24,102,199 | $ 37,217,510 |
| Furniture and home furnishings stores [442] | $ 2,783,401 | $ 4,298,000 |
| Electronics and appliance stores [443] | $ 2,984,967 | $ 4,609,249 |
| Building material and garden equipment and supplies dealers [444] | $ 4,337,733 | $ 6,698,128 |
| Food and beverage stores [445] | $ 15,845,202 | $ 24,467,433 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 11,698,568 | $ 18,064,392 |
| Convenience stores [44512] | $ 874,926 | $ 1,351,020 |
| Specialty food stores [4452] | $ 597,104 | $ 922,021 |
| Beer, wine and liquor stores [4453] | $ 2,674,605 | $ 4,130,002 |
| Health and personal care stores [446] | $ 3,529,621 | $ 5,450,278 |
| Gasoline stations [447] | $ 11,290,800 | $ 17,434,735 |
| Clothing and clothing accessories stores [448] | $ 4,816,431 | $ 7,437,312 |
| Sporting goods, hobby, book and music stores [451] | $ 2,115,119 | $ 3,266,070 |
| General merchandise stores [452] | $ 10,533,731 | $ 16,265,704 |
| Miscellaneous store retailers [453] | $ 1,933,891 | $ 2,986,226 |
| **TOTAL - MAJOR RETAIL CATEGORIES (3-Digit NAICS Codes, Some 4-Digit Co** | **$ 84,273,000** | **$ 130,131,000** |

Source: Colliers International Consulting

## 6. Aberdeen
### Projected Resident Sales Capture by Relevant Category

| Major Retail Category | 2014 | 2035 | Incremental Demand |
|---|---|---|---|
| Motor vehicle and parts dealers [441] | $ 24,102,199 | $ 37,217,510 | $ 13,115,311 |
| Furniture and home furnishings stores [442] | $ 2,783,000 | $ 4,298,000 | $ 1,515,000 |
| Electronics and appliance stores [443] | $ 2,985,000 | $ 4,609,000 | $ 1,624,000 |
| Building material and garden equipment and supplies dealers [444] | $ 4,338,000 | $ 6,698,000 | $ 2,360,000 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 11,699,000 | $ 18,064,000 | $ 6,365,000 |
| Convenience stores [44512] | $ 875,000 | $ 1,351,000 | $ 476,000 |
| Specialty food stores [4452] | $ 597,000 | $ 922,000 | $ 325,000 |
| Beer, wine and liquor stores [4453] | $ 2,675,000 | $ 4,130,000 | $ 1,455,000 |
| Health and personal care stores [446] | $ 3,530,000 | $ 5,450,000 | $ 1,920,000 |
| Gasoline stations [447] | $ 11,291,000 | $ 17,435,000 | $ 6,144,000 |
| Clothing and clothing accessories stores [448] | $ 4,816,000 | $ 7,437,000 | $ 2,621,000 |
| Sporting goods, hobby, book and music stores [451] | $ 2,115,000 | $ 3,266,000 | $ 1,151,000 |
| General merchandise stores [452] | $ 10,534,000 | $ 16,266,000 | $ 5,732,000 |
| Miscellaneous store retailers [453] | $ 1,934,000 | $ 2,986,000 | $ 1,052,000 |
| TOTAL, NET RETAIL EXPENDITURES - Above Categories | **$ 84,274,000** | **$ 130,130,000** | **$ 45,855,000** |

Source: Colliers International Consulting - Rounded to nearest $1,000.

## 6. Aberdeen
### Projected Resident Floor Area Support (nearest 1,000 SF)

| Major Retail Category | Reqm't ($/Sq. Ft.) | Incremental (2014-35) Area Support (sf) |
|---|---|---|
| Motor vehicle and parts dealers [441] | $890 | 14,700 |
| Furniture and home furnishings stores [442] | $440 | 3,400 |
| Electronics and appliance stores [443] | $1,000 | 1,600 |
| Building material and garden equipment and supplies dealers [444] | $440 | 5,400 |
| Supermarkets and other grocery (except convenience) stores [44511] | $720 | 16,200 |
| Convenience stores [44512] | $890 | 500 |
| Specialty food stores [4452] | $670 | 500 |
| Beer, wine and liquor stores [4453] | $940 | 1,500 |
| Health and personal care stores [446] | $890 | 2,200 |
| Clothing and clothing accessories stores [448] | $560 | 4,700 |
| Sporting goods, hobby, book and music stores [451] | $500 | 2,300 |
| General merchandise stores [452] | $500 | 11,500 |
| Miscellaneous store retailers [453] | $560 | 1,900 |
| NET WARRANTED RETAIL FLOOR AREA - Above Categories (Nearest 100 sf) | | **66,400** |

Source: Colliers International Consulting





## 7. West Townline
### Growth in Annual Resident Expenditure Potential (2014-2035)

| | 2014 | 2035 |
|---|---|---|
| POPULATION | 10,410 | 12,800 |
| INCOME (PDI) | $ 19,845 | $ 24,457 |
| TOTAL INCOME POTENTIAL | $206,591,090 | $313,054,300 |
| RETAIL SALES / INCOME | 47.3% | 47.3% |
| TOTAL RETAIL POTENTIAL | **$97,733,300** | **$148,098,500** |
| Motor vehicle and parts dealers [441] | $ 30,563,426 | $ 46,313,770 |
| Furniture and home furnishings stores [442] | $ 3,529,565 | $ 5,348,466 |
| Electronics and appliance stores [443] | $ 3,785,166 | $ 5,735,787 |
| Building material and garden equipment and supplies dealers [444] | $ 5,500,576 | $ 8,335,205 |
| Food and beverage stores [445] | $ 20,092,924 | $ 30,447,472 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 14,834,677 | $ 22,479,476 |
| Convenience stores [44512] | $ 1,109,472 | $ 1,681,220 |
| Specialty food stores [4452] | $ 757,174 | $ 1,147,370 |
| Beer, wine and liquor stores [4453] | $ 3,391,603 | $ 5,139,408 |
| Health and personal care stores [446] | $ 4,475,828 | $ 6,782,371 |
| Gasoline stations [447] | $ 14,317,595 | $ 21,695,925 |
| Clothing and clothing accessories stores [448] | $ 6,107,602 | $ 9,255,051 |
| Sporting goods, hobby, book and music stores [451] | $ 2,682,132 | $ 4,064,324 |
| General merchandise stores [452] | $ 13,357,574 | $ 20,241,173 |
| Miscellaneous store retailers [453] | $ 2,452,322 | $ 3,716,084 |
| TOTAL - MAJOR RETAIL CATEGORIES (3-Digit NAICS Codes, Some 4-Digit Codes) | **$ 106,865,000** | **$ 161,936,000** |

Source: Colliers International Consulting

## 7. West Townline
### Projected Resident Sales Capture by Relevant Category

| Major Retail Category | 2014 | 2035 | Incremental Demand |
|---|---|---|---|
| Motor vehicle and parts dealers [441] | $ 30,563,426 | $ 46,313,770 | $ 15,750,344 |
| Furniture and home furnishings stores [442] | $ 3,530,000 | $ 5,348,000 | $ 1,818,000 |
| Electronics and appliance stores [443] | $ 3,785,000 | $ 5,736,000 | $ 1,951,000 |
| Building material and garden equipment and supplies dealers [444] | $ 5,501,000 | $ 8,335,000 | $ 2,834,000 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 14,835,000 | $ 22,479,000 | $ 7,644,000 |
| Convenience stores [44512] | $ 1,109,000 | $ 1,681,000 | $ 572,000 |
| Specialty food stores [4452] | $ 757,000 | $ 1,147,000 | $ 390,000 |
| Beer, wine and liquor stores [4453] | $ 3,392,000 | $ 5,139,000 | $ 1,747,000 |
| Health and personal care stores [446] | $ 4,476,000 | $ 6,782,000 | $ 2,306,000 |
| Gasoline stations [447] | $ 14,318,000 | $ 21,696,000 | $ 7,378,000 |
| Clothing and clothing accessories stores [448] | $ 6,108,000 | $ 9,255,000 | $ 3,147,000 |
| Sporting goods, hobby, book and music stores [451] | $ 2,682,000 | $ 4,064,000 | $ 1,382,000 |
| General merchandise stores [452] | $ 13,358,000 | $ 20,241,000 | $ 6,883,000 |
| Miscellaneous store retailers [453] | $ 2,452,000 | $ 3,716,000 | $ 1,264,000 |
| TOTAL, NET RETAIL EXPENDITURES - Above Categories | **$ 106,866,000** | **$ 161,933,000** | **$ 55,066,000** |

Source: Colliers International Consulting - Rounded to nearest $1,000.

## 7. West Townline
### Projected Resident Floor Area Support (nearest 1,000 SF)

| Major Retail Category | Reqm't ($/Sq. Ft.) | Incremental (2014-35) Area Support (sf) |
|---|---|---|
| Motor vehicle and parts dealers [441] | $890 | 17,700 |
| Furniture and home furnishings stores [442] | $440 | 4,100 |
| Electronics and appliance stores [443] | $1,000 | 2,000 |
| Building material and garden equipment and supplies dealers [444] | $440 | 6,400 |
| Supermarkets and other grocery (except convenience) stores [44511] | $720 | 20,600 |
| Convenience stores [44512] | $890 | 600 |
| Specialty food stores [4452] | $670 | 600 |
| Beer, wine and liquor stores [4453] | $940 | 1,900 |
| Health and personal care stores [446] | $890 | 2,600 |
| Clothing and clothing accessories stores [448] | $560 | 5,600 |
| Sporting goods, hobby, book and music stores [451] | $500 | 2,800 |
| General merchandise stores [452] | $500 | 13,800 |
| Miscellaneous store retailers [453] | $560 | 2,300 |
| NET WARRANTED RETAIL FLOOR AREA - Above Categories (Nearest 100 sf) | | **81,000** |

Source: Colliers International Consulting





## 8. East Townline
### Growth in Annual Resident Expenditure Potential (2014-2035)

| | 2014 | 2035 |
|---|---|---|
| POPULATION | 11,465 | 12,100 |
| INCOME (PDI) | $ 20,264 | $ 24,973 |
| TOTAL INCOME POTENTIAL | $232,322,000 | $302,169,410 |
| RETAIL SALES / INCOME | 47.2% | 47.2% |
| TOTAL RETAIL POTENTIAL | **$109,594,200** | **$142,543,600** |
| Motor vehicle and parts dealers [441] | $ 34,272,599 | $ 44,576,626 |
| Furniture and home furnishings stores [442] | $ 3,957,912 | $ 5,147,855 |
| Electronics and appliance stores [443] | $ 4,244,533 | $ 5,520,648 |
| Building material and garden equipment and supplies dealers [444] | $ 6,168,125 | $ 8,022,567 |
| Food and beverage stores [445] | $ 22,531,399 | $ 29,305,444 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 16,635,011 | $ 21,636,312 |
| Convenience stores [44512] | $ 1,244,118 | $ 1,618,161 |
| Specialty food stores [4452] | $ 849,064 | $ 1,104,335 |
| Beer, wine and liquor stores [4453] | $ 3,803,207 | $ 4,946,638 |
| Health and personal care stores [446] | $ 5,019,014 | $ 6,527,976 |
| Gasoline stations [447] | $ 16,055,177 | $ 20,882,151 |
| Clothing and clothing accessories stores [448] | $ 6,848,820 | $ 8,907,911 |
| Sporting goods, hobby, book and music stores [451] | $ 3,007,636 | $ 3,911,879 |
| General merchandise stores [452] | $ 14,978,647 | $ 19,481,964 |
| Miscellaneous store retailers [453] | $ 2,749,935 | $ 3,576,701 |
| TOTAL - MAJOR RETAIL CATEGORIES (3-Digit NAICS Codes, Some 4-Digit C | **$ 119,834,000** | **$ 155,862,000** |

Source: Colliers International Consulting

## 8. East Townline
### Projected Resident Sales Capture by Relevant Category

| Major Retail Category | 2014 | 2035 | Incremental Demand |
|---|---|---|---|
| Motor vehicle and parts dealers [441] | $ 34,272,599 | $ 44,576,626 | $ 10,304,027 |
| Furniture and home furnishings stores [442] | $ 3,958,000 | $ 5,148,000 | $ 1,190,000 |
| Electronics and appliance stores [443] | $ 4,245,000 | $ 5,521,000 | $ 1,276,000 |
| Building material and garden equipment and supplies dealers [444] | $ 6,168,000 | $ 8,023,000 | $ 1,855,000 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 16,635,000 | $ 21,636,000 | $ 5,001,000 |
| Convenience stores [44512] | $ 1,244,000 | $ 1,618,000 | $ 374,000 |
| Specialty food stores [4452] | $ 849,000 | $ 1,104,000 | $ 255,000 |
| Beer, wine and liquor stores [4453] | $ 3,803,000 | $ 4,947,000 | $ 1,144,000 |
| Health and personal care stores [446] | $ 5,019,000 | $ 6,528,000 | $ 1,509,000 |
| Gasoline stations [447] | $ 16,055,000 | $ 20,882,000 | $ 4,827,000 |
| Clothing and clothing accessories stores [448] | $ 6,849,000 | $ 8,908,000 | $ 2,059,000 |
| Sporting goods, hobby, book and music stores [451] | $ 3,008,000 | $ 3,912,000 | $ 904,000 |
| General merchandise stores [452] | $ 14,979,000 | $ 19,482,000 | $ 4,503,000 |
| Miscellaneous store retailers [453] | $ 2,750,000 | $ 3,577,000 | $ 827,000 |
| TOTAL, NET RETAIL EXPENDITURES - Above Categories | **$ 119,835,000** | **$ 155,863,000** | **$ 36,028,000** |

Source: Colliers International Consulting - Rounded to nearest $1,000.

## 8. East Townline
### Projected Resident Floor Area Support (nearest 1,000 SF)

| Major Retail Category | Reqm't ($/Sq. Ft.) | Incremental (2014-35) Area Support (sf) |
|---|---|---|
| Motor vehicle and parts dealers [441] | $890 | 11,600 |
| Furniture and home furnishings stores [442] | $440 | 2,700 |
| Electronics and appliance stores [443] | $1,000 | 1,300 |
| Building material and garden equipment and supplies dealers [444] | $440 | 4,200 |
| Supermarkets and other grocery (except convenience) stores [44511] | $720 | 23,100 |
| Convenience stores [44512] | $890 | 400 |
| Specialty food stores [4452] | $670 | 400 |
| Beer, wine and liquor stores [4453] | $940 | 1,200 |
| Health and personal care stores [446] | $890 | 1,700 |
| Clothing and clothing accessories stores [448] | $560 | 3,700 |
| Sporting goods, hobby, book and music stores [451] | $500 | 1,800 |
| General merchandise stores [452] | $500 | 9,000 |
| Miscellaneous store retailers [453] | $560 | 1,500 |
| NET WARRANTED RETAIL FLOOR AREA - Above Categories (Nearest 100 sf) | | **62,600** |

Source: Colliers International Consulting





## 9. Fairfield
### Growth in Annual Resident Expenditure Potential (2014-2035)

| | 2014 | 2035 |
|---|---|---|
| POPULATION | 9,075 | 9,700 |
| INCOME (PDI) | $ 24,483 | $ 30,172 |
| TOTAL INCOME POTENTIAL | $222,181,050 | $292,671,860 |
| RETAIL SALES / INCOME | 45.8% | 45.8% |
| TOTAL RETAIL POTENTIAL | **$101,801,900** | **$134,100,300** |
| Motor vehicle and parts dealers [441] | $ 31,835,770 | $ 41,936,214 |
| Furniture and home furnishings stores [442] | $ 3,676,499 | $ 4,842,932 |
| Electronics and appliance stores [443] | $ 3,942,741 | $ 5,193,643 |
| Building material and garden equipment and supplies dealers [444] | $ 5,729,563 | $ 7,547,365 |
| Food and beverage stores [445] | $ 20,929,385 | $ 27,569,592 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 15,452,239 | $ 20,354,726 |
| Convenience stores [44512] | $ 1,155,659 | $ 1,522,312 |
| Specialty food stores [4452] | $ 788,695 | $ 1,038,922 |
| Beer, wine and liquor stores [4453] | $ 3,532,794 | $ 4,653,634 |
| Health and personal care stores [446] | $ 4,662,155 | $ 6,141,304 |
| Gasoline stations [447] | $ 14,913,631 | $ 19,645,237 |
| Clothing and clothing accessories stores [448] | $ 6,361,859 | $ 8,380,268 |
| Sporting goods, hobby, book and music stores [451] | $ 2,793,789 | $ 3,680,166 |
| General merchandise stores [452] | $ 13,913,644 | $ 18,327,987 |
| Miscellaneous store retailers [453] | $ 2,554,411 | $ 3,364,842 |
| TOTAL - MAJOR RETAIL CATEGORIES (3-Digit NAICS Codes, Some 4-Digit C | **$ 111,313,000** | **$ 146,630,000** |

Source: Colliers International Consulting

## 9. Fairfield
### Projected Resident Sales Capture by Relevant Category

| Major Retail Category | 2014 | 2035 | Incremental Demand |
|---|---|---|---|
| Motor vehicle and parts dealers [441] | $ 31,835,770 | $ 41,936,214 | $ 10,100,444 |
| Furniture and home furnishings stores [442] | $ 3,676,000 | $ 4,843,000 | $ 1,167,000 |
| Electronics and appliance stores [443] | $ 3,943,000 | $ 5,194,000 | $ 1,251,000 |
| Building material and garden equipment and supplies dealers [444] | $ 5,730,000 | $ 7,547,000 | $ 1,817,000 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 15,452,000 | $ 20,355,000 | $ 4,903,000 |
| Convenience stores [44512] | $ 1,156,000 | $ 1,522,000 | $ 366,000 |
| Specialty food stores [4452] | $ 789,000 | $ 1,039,000 | $ 250,000 |
| Beer, wine and liquor stores [4453] | $ 3,533,000 | $ 4,654,000 | $ 1,121,000 |
| Health and personal care stores [446] | $ 4,662,000 | $ 6,141,000 | $ 1,479,000 |
| Gasoline stations [447] | $ 14,914,000 | $ 19,645,000 | $ 4,731,000 |
| Clothing and clothing accessories stores [448] | $ 6,362,000 | $ 8,380,000 | $ 2,018,000 |
| Sporting goods, hobby, book and music stores [451] | $ 2,794,000 | $ 3,680,000 | $ 886,000 |
| General merchandise stores [452] | $ 13,914,000 | $ 18,328,000 | $ 4,414,000 |
| Miscellaneous store retailers [453] | $ 2,554,000 | $ 3,365,000 | $ 811,000 |
| TOTAL, NET RETAIL EXPENDITURES - Above Categories | **$ 111,315,000** | **$ 146,629,000** | **$ 35,314,000** |

Source: Colliers International Consulting - Rounded to nearest $1,000.

## 9. Fairfield
### Projected Resident Floor Area Support (nearest 1,000 SF)

| Major Retail Category | Reqm't ($/Sq. Ft.) | Incremental (2014-35) Area Support (sf) |
|---|---|---|
| Motor vehicle and parts dealers [441] | $890 | 11,300 |
| Furniture and home furnishings stores [442] | $440 | 2,700 |
| Electronics and appliance stores [443] | $1,000 | 1,300 |
| Building material and garden equipment and supplies dealers [444] | $440 | 4,100 |
| Supermarkets and other grocery (except convenience) stores [44511] | $720 | 21,500 |
| Convenience stores [44512] | $890 | 400 |
| Specialty food stores [4452] | $670 | 400 |
| Beer, wine and liquor stores [4453] | $940 | 1,200 |
| Health and personal care stores [446] | $890 | 1,700 |
| Clothing and clothing accessories stores [448] | $560 | 3,600 |
| Sporting goods, hobby, book and music stores [451] | $500 | 1,800 |
| General merchandise stores [452] | $500 | 8,800 |
| Miscellaneous store retailers [453] | $560 | 1,400 |
| NET WARRANTED RETAIL FLOOR AREA - Above Categories (Nearest 100 sf) | | 60,200 |

Source: Colliers International Consulting





## 10. Old Clayburn
### Growth in Annual Resident Expenditure Potential (2014-2035)

| | 2014 | 2035 |
|---|---|---|
| POPULATION | 17,325 | 22,500 |
| INCOME (PDI) | $ 33,941 | $ 41,829 |
| TOTAL INCOME POTENTIAL | $588,036,270 | $941,157,350 |
| RETAIL SALES / INCOME | 42.8% | 42.8% |
| TOTAL RETAIL POTENTIAL | **$251,583,700** | **$402,662,000** |
| Motor vehicle and parts dealers [441] | $ 78,675,946 | $ 125,921,567 |
| Furniture and home furnishings stores [442] | $ 9,085,756 | $ 14,541,835 |
| Electronics and appliance stores [443] | $ 9,743,721 | $ 15,594,914 |
| Building material and garden equipment and supplies dealers [444] | $ 14,159,507 | $ 22,662,420 |
| Food and beverage stores [445] | $ 51,722,926 | $ 82,783,013 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 38,187,218 | $ 61,118,990 |
| Convenience stores [44512] | $ 2,855,988 | $ 4,571,035 |
| Specialty food stores [4452] | $ 1,949,106 | $ 3,119,562 |
| Beer, wine and liquor stores [4453] | $ 8,730,617 | $ 13,973,432 |
| Health and personal care stores [446] | $ 11,521,615 | $ 18,440,450 |
| Gasoline stations [447] | $ 36,856,154 | $ 58,988,610 |
| Clothing and clothing accessories stores [448] | $ 15,722,104 | $ 25,163,370 |
| Sporting goods, hobby, book and music stores [451] | $ 6,904,308 | $ 11,050,408 |
| General merchandise stores [452] | $ 34,384,880 | $ 55,033,314 |
| Miscellaneous store retailers [453] | $ 6,312,733 | $ 10,103,586 |
| TOTAL - MAJOR RETAIL CATEGORIES (3-Digit NAICS Codes, Some 4-Digit C | **$ 275,090,000** | **$ 440,283,000** |

Source: Colliers International Consulting

## 10. Old Clayburn
### Projected Resident Sales Capture by Relevant Category

| Major Retail Category | 2014 | 2035 | Incremental Demand |
|---|---|---|---|
| Motor vehicle and parts dealers [441] | $ 78,675,946 | $ 125,921,567 | $ 47,245,621 |
| Furniture and home furnishings stores [442] | $ 9,086,000 | $ 14,542,000 | $ 5,456,000 |
| Electronics and appliance stores [443] | $ 9,744,000 | $ 15,595,000 | $ 5,851,000 |
| Building material and garden equipment and supplies dealers [444] | $ 14,160,000 | $ 22,662,000 | $ 8,502,000 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 38,187,000 | $ 61,119,000 | $ 22,932,000 |
| Convenience stores [44512] | $ 2,856,000 | $ 4,571,000 | $ 1,715,000 |
| Specialty food stores [4452] | $ 1,949,000 | $ 3,120,000 | $ 1,171,000 |
| Beer, wine and liquor stores [4453] | $ 8,731,000 | $ 13,973,000 | $ 5,242,000 |
| Health and personal care stores [446] | $ 11,522,000 | $ 18,440,000 | $ 6,918,000 |
| Gasoline stations [447] | $ 36,856,000 | $ 58,989,000 | $ 22,133,000 |
| Clothing and clothing accessories stores [448] | $ 15,722,000 | $ 25,163,000 | $ 9,441,000 |
| Sporting goods, hobby, book and music stores [451] | $ 6,904,000 | $ 11,050,000 | $ 4,146,000 |
| General merchandise stores [452] | $ 34,385,000 | $ 55,033,000 | $ 20,648,000 |
| Miscellaneous store retailers [453] | $ 6,313,000 | $ 10,104,000 | $ 3,791,000 |
| TOTAL, NET RETAIL EXPENDITURES - Above Categories | **$ 275,091,000** | **$ 440,283,000** | **$ 165,192,000** |

Source: Colliers International Consulting - Rounded to nearest $1,000.

## 10. Old Clayburn
### Projected Resident Floor Area Support (nearest 1,000 SF)

| Major Retail Category | Reqm't ($/Sq. Ft.) | Incremental (2014-35) Area Support (sf) |
|---|---|---|
| Motor vehicle and parts dealers [441] | $890 | 53,100 |
| Furniture and home furnishings stores [442] | $440 | 12,400 |
| Electronics and appliance stores [443] | $1,000 | 5,900 |
| Building material and garden equipment and supplies dealers [444] | $440 | 19,300 |
| Supermarkets and other grocery (except convenience) stores [44511] | $720 | 53,000 |
| Convenience stores [44512] | $890 | 1,900 |
| Specialty food stores [4452] | $670 | 1,700 |
| Beer, wine and liquor stores [4453] | $940 | 5,600 |
| Health and personal care stores [446] | $890 | 7,800 |
| Clothing and clothing accessories stores [448] | $560 | 16,900 |
| Sporting goods, hobby, book and music stores [451] | $500 | 8,300 |
| General merchandise stores [452] | $500 | 41,300 |
| Miscellaneous store retailers [453] | $560 | 6,800 |
| NET WARRANTED RETAIL FLOOR AREA - Above Categories (Nearest 100 sf) | | 234,000 |

Source: Colliers International Consulting





## 11. West Clearbrook
### Growth in Annual Resident Expenditure Potential (2014-2035)

| | 2014 | 2035 |
|---|---|---|
| POPULATION | 6,010 | 7,000 |
| INCOME (PDI) | $ 22,063 | $ 27,191 |
| TOTAL INCOME POTENTIAL | $132,600,640 | $190,334,730 |
| RETAIL SALES / INCOME | 46.6% | 46.6% |
| TOTAL RETAIL POTENTIAL | **$61,786,300** | **$88,688,000** |
| Motor vehicle and parts dealers [441] | $ 19,321,982 | $ 27,734,755 |
| Furniture and home furnishings stores [442] | $ 2,231,366 | $ 3,202,900 |
| Electronics and appliance stores [443] | $ 2,392,955 | $ 3,434,846 |
| Building material and garden equipment and supplies dealers [444] | $ 3,477,425 | $ 4,991,493 |
| Food and beverage stores [445] | $ 12,702,604 | $ 18,233,307 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 9,378,377 | $ 13,461,715 |
| Convenience stores [44512] | $ 701,401 | $ 1,006,790 |
| Specialty food stores [4452] | $ 478,680 | $ 687,097 |
| Beer, wine and liquor stores [4453] | $ 2,144,147 | $ 3,077,707 |
| Health and personal care stores [446] | $ 2,829,587 | $ 4,061,587 |
| Gasoline stations [447] | $ 9,051,482 | $ 12,992,490 |
| Clothing and clothing accessories stores [448] | $ 3,861,183 | $ 5,542,338 |
| Sporting goods, hobby, book and music stores [451] | $ 1,695,625 | $ 2,433,899 |
| General merchandise stores [452] | $ 8,444,564 | $ 12,121,319 |
| Miscellaneous store retailers [453] | $ 1,550,340 | $ 2,225,357 |
| TOTAL - MAJOR RETAIL CATEGORIES (3-Digit NAICS Codes, Some 4-Digit C | **$ 67,559,000** | **$ 96,974,000** |

Source: Colliers International Consulting

## 11. West Clearbrook
### Projected Resident Sales Capture by Relevant Category

| Major Retail Category | 2014 | 2035 | Incremental Demand |
|---|---|---|---|
| Motor vehicle and parts dealers [441] | $ 19,321,982 | $ 27,734,755 | $ 8,412,774 |
| Furniture and home furnishings stores [442] | $ 2,231,000 | $ 3,203,000 | $ 972,000 |
| Electronics and appliance stores [443] | $ 2,393,000 | $ 3,435,000 | $ 1,042,000 |
| Building material and garden equipment and supplies dealers [444] | $ 3,477,000 | $ 4,991,000 | $ 1,514,000 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 9,378,000 | $ 13,462,000 | $ 4,084,000 |
| Convenience stores [44512] | $ 701,000 | $ 1,007,000 | $ 306,000 |
| Specialty food stores [4452] | $ 479,000 | $ 687,000 | $ 208,000 |
| Beer, wine and liquor stores [4453] | $ 2,144,000 | $ 3,078,000 | $ 934,000 |
| Health and personal care stores [446] | $ 2,830,000 | $ 4,062,000 | $ 1,232,000 |
| Gasoline stations [447] | $ 9,051,000 | $ 12,992,000 | $ 3,941,000 |
| Clothing and clothing accessories stores [448] | $ 3,861,000 | $ 5,542,000 | $ 1,681,000 |
| Sporting goods, hobby, book and music stores [451] | $ 1,696,000 | $ 2,434,000 | $ 738,000 |
| General merchandise stores [452] | $ 8,445,000 | $ 12,121,000 | $ 3,676,000 |
| Miscellaneous store retailers [453] | $ 1,550,000 | $ 2,225,000 | $ 675,000 |
| TOTAL, NET RETAIL EXPENDITURES - Above Categories | **$ 67,558,000** | **$ 96,974,000** | **$ 29,416,000** |

Source: Colliers International Consulting - Rounded to nearest $1,000.

## 11. West Clearbrook
### Projected Resident Floor Area Support (nearest 1,000 SF)

| Major Retail Category | Reqm't ($/Sq. Ft.) | Incremental (2014-35) Area Support (sf) |
|---|---|---|
| Motor vehicle and parts dealers [441] | $890 | 9,500 |
| Furniture and home furnishings stores [442] | $440 | 2,200 |
| Electronics and appliance stores [443] | $1,000 | 1,000 |
| Building material and garden equipment and supplies dealers [444] | $440 | 3,400 |
| Supermarkets and other grocery (except convenience) stores [44511] | $720 | 13,000 |
| Convenience stores [44512] | $890 | 300 |
| Specialty food stores [4452] | $670 | 300 |
| Beer, wine and liquor stores [4453] | $940 | 1,000 |
| Health and personal care stores [446] | $890 | 1,400 |
| Clothing and clothing accessories stores [448] | $560 | 3,000 |
| Sporting goods, hobby, book and music stores [451] | $500 | 1,500 |
| General merchandise stores [452] | $500 | 7,400 |
| Miscellaneous store retailers [453] | $560 | 1,200 |
| NET WARRANTED RETAIL FLOOR AREA - Above Categories (Nearest 100 sf) | | **45,200** |

Source: Colliers International Consulting





## 12. Clearbrook Centre
### Growth in Annual Resident Expenditure Potential (2014-2035)

| | 2014 | 2035 |
|---|---|---|
| POPULATION | 12,750 | 23,200 |
| INCOME (PDI) | $ 24,643 | $ 30,370 |
| TOTAL INCOME POTENTIAL | $314,195,790 | $704,574,640 |
| RETAIL SALES / INCOME | 45.8% | 45.8% |
| TOTAL RETAIL POTENTIAL | **$143,801,000** | **$322,469,500** |
| Motor vehicle and parts dealers [441] | $ 44,969,844 | $ 100,843,548 |
| Furniture and home furnishings stores [442] | $ 5,193,265 | $ 11,645,744 |
| Electronics and appliance stores [443] | $ 5,569,347 | $ 12,489,096 |
| Building material and garden equipment and supplies dealers [444] | $ 8,093,335 | $ 18,149,066 |
| Food and beverage stores [445] | $ 29,563,952 | $ 66,296,290 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 21,827,170 | $ 48,946,784 |
| Convenience stores [44512] | $ 1,632,435 | $ 3,660,687 |
| Specialty food stores [4452] | $ 1,114,076 | $ 2,498,283 |
| Beer, wine and liquor stores [4453] | $ 4,990,273 | $ 11,190,541 |
| Health and personal care stores [446] | $ 6,585,561 | $ 14,767,926 |
| Gasoline stations [447] | $ 21,066,356 | $ 47,240,682 |
| Clothing and clothing accessories stores [448] | $ 8,986,489 | $ 20,151,937 |
| Sporting goods, hobby, book and music stores [451] | $ 3,946,386 | $ 8,849,654 |
| General merchandise stores [452] | $ 19,653,818 | $ 44,073,106 |
| Miscellaneous store retailers [453] | $ 3,608,252 | $ 8,091,398 |
| TOTAL - MAJOR RETAIL CATEGORIES (3-Digit NAICS Codes, Some 4-Digit C | **$ 157,237,000** | **$ 352,598,000** |

Source: Colliers International Consulting

## 12. Clearbrook Centre
### Projected Resident Sales Capture by Relevant Category

| Major Retail Category | 2014 | 2035 | Incremental Demand |
|---|---|---|---|
| Motor vehicle and parts dealers [441] | $ 44,969,844 | $ 100,843,548 | $ 55,873,704 |
| Furniture and home furnishings stores [442] | $ 5,193,000 | $ 11,646,000 | $ 6,453,000 |
| Electronics and appliance stores [443] | $ 5,569,000 | $ 12,489,000 | $ 6,920,000 |
| Building material and garden equipment and supplies dealers [444] | $ 8,093,000 | $ 18,149,000 | $ 10,056,000 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 21,827,000 | $ 48,947,000 | $ 27,120,000 |
| Convenience stores [44512] | $ 1,632,000 | $ 3,661,000 | $ 2,029,000 |
| Specialty food stores [4452] | $ 1,114,000 | $ 2,498,000 | $ 1,384,000 |
| Beer, wine and liquor stores [4453] | $ 4,990,000 | $ 11,191,000 | $ 6,201,000 |
| Health and personal care stores [446] | $ 6,586,000 | $ 14,768,000 | $ 8,182,000 |
| Gasoline stations [447] | $ 21,066,000 | $ 47,241,000 | $ 26,175,000 |
| Clothing and clothing accessories stores [448] | $ 8,986,000 | $ 20,152,000 | $ 11,166,000 |
| Sporting goods, hobby, book and music stores [451] | $ 3,946,000 | $ 8,850,000 | $ 4,904,000 |
| General merchandise stores [452] | $ 19,654,000 | $ 44,073,000 | $ 24,419,000 |
| Miscellaneous store retailers [453] | $ 3,608,000 | $ 8,091,000 | $ 4,483,000 |
| TOTAL, NET RETAIL EXPENDITURES - Above Categories | **$ 157,234,000** | **$ 352,600,000** | **$ 195,366,000** |

Source: Colliers International Consulting - Rounded to nearest $1,000.

## 12. Clearbrook Centre
### Projected Resident Floor Area Support (nearest 1,000 SF)

| Major Retail Category | Reqm't ($/Sq. Ft.) | Incremental (2014-35) Area Support (sf) |
|---|---|---|
| Motor vehicle and parts dealers [441] | $890 | 62,800 |
| Furniture and home furnishings stores [442] | $440 | 14,700 |
| Electronics and appliance stores [443] | $1,000 | 6,900 |
| Building material and garden equipment and supplies dealers [444] | $440 | 22,900 |
| Supermarkets and other grocery (except convenience) stores [44511] | $720 | 30,300 |
| Convenience stores [44512] | $890 | 2,300 |
| Specialty food stores [4452] | $670 | 2,100 |
| Beer, wine and liquor stores [4453] | $940 | 6,600 |
| Health and personal care stores [446] | $890 | 9,200 |
| Clothing and clothing accessories stores [448] | $560 | 19,900 |
| Sporting goods, hobby, book and music stores [451] | $500 | 9,800 |
| General merchandise stores [452] | $500 | 48,800 |
| Miscellaneous store retailers [453] | $560 | 8,000 |
| NET WARRANTED RETAIL FLOOR AREA - Above Categories (Nearest 100 sf) | | **244,300** |

Source: Colliers International Consulting





## 13. Babich
### Growth in Annual Resident Expenditure Potential (2014-2035)

| | 2014 | 2035 |
|---|---|---|
| POPULATION | 5,230 | 8,000 |
| INCOME (PDI) | $ 23,211 | $ 28,605 |
| TOTAL INCOME POTENTIAL | $121,394,010 | $228,841,300 |
| RETAIL SALES / INCOME | 46.2% | 46.2% |
| TOTAL RETAIL POTENTIAL | **$56,117,400** | **$105,787,500** |
| Motor vehicle and parts dealers [441] | $ 17,549,188 | $ 33,082,158 |
| Furniture and home furnishings stores [442] | $ 2,026,638 | $ 3,820,436 |
| Electronics and appliance stores [443] | $ 2,173,401 | $ 4,097,101 |
| Building material and garden equipment and supplies dealers [444] | $ 3,158,371 | $ 5,953,879 |
| Food and beverage stores [445] | $ 11,537,139 | $ 21,748,782 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 8,517,910 | $ 16,057,202 |
| Convenience stores [44512] | $ 637,047 | $ 1,200,904 |
| Specialty food stores [4452] | $ 434,761 | $ 819,572 |
| Beer, wine and liquor stores [4453] | $ 1,947,422 | $ 3,671,105 |
| Health and personal care stores [446] | $ 2,569,972 | $ 4,844,681 |
| Gasoline stations [447] | $ 8,221,008 | $ 15,497,508 |
| Clothing and clothing accessories stores [448] | $ 3,506,919 | $ 6,610,929 |
| Sporting goods, hobby, book and music stores [451] | $ 1,540,051 | $ 2,903,167 |
| General merchandise stores [452] | $ 7,669,774 | $ 14,458,371 |
| Miscellaneous store retailers [453] | $ 1,408,097 | $ 2,654,418 |
| TOTAL - MAJOR RETAIL CATEGORIES (3-Digit NAICS Codes, Some 4-Digit C | **$ 61,361,000** | **$ 115,671,000** |

Source: Colliers International Consulting

## 13. Babich
### Projected Resident Sales Capture by Relevant Category

| Major Retail Category | 2014 | 2035 | Incremental Demand |
|---|---|---|---|
| Motor vehicle and parts dealers [441] | $ 17,549,188 | $ 33,082,158 | $ 15,532,970 |
| Furniture and home furnishings stores [442] | $ 2,027,000 | $ 3,820,000 | $ 1,793,000 |
| Electronics and appliance stores [443] | $ 2,173,000 | $ 4,097,000 | $ 1,924,000 |
| Building material and garden equipment and supplies dealers [444] | $ 3,158,000 | $ 5,954,000 | $ 2,796,000 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 8,518,000 | $ 16,057,000 | $ 7,539,000 |
| Convenience stores [44512] | $ 637,000 | $ 1,201,000 | $ 564,000 |
| Specialty food stores [4452] | $ 435,000 | $ 820,000 | $ 385,000 |
| Beer, wine and liquor stores [4453] | $ 1,947,000 | $ 3,671,000 | $ 1,724,000 |
| Health and personal care stores [446] | $ 2,570,000 | $ 4,845,000 | $ 2,275,000 |
| Gasoline stations [447] | $ 8,221,000 | $ 15,498,000 | $ 7,277,000 |
| Clothing and clothing accessories stores [448] | $ 3,507,000 | $ 6,611,000 | $ 3,104,000 |
| Sporting goods, hobby, book and music stores [451] | $ 1,540,000 | $ 2,903,000 | $ 1,363,000 |
| General merchandise stores [452] | $ 7,670,000 | $ 14,458,000 | $ 6,788,000 |
| Miscellaneous store retailers [453] | $ 1,408,000 | $ 2,654,000 | $ 1,246,000 |
| TOTAL, NET RETAIL EXPENDITURES - Above Categories | **$ 61,360,000** | **$ 115,671,000** | **$ 54,311,000** |

Source: Colliers International Consulting - Rounded to nearest $1,000.

## 13. Babich
### Projected Resident Floor Area Support (nearest 1,000 SF)

| Major Retail Category | Reqm't ($/Sq. Ft.) | Incremental (2014-35) Area Support (sf) |
|---|---|---|
| Motor vehicle and parts dealers [441] | $890 | 17,500 |
| Furniture and home furnishings stores [442] | $440 | 4,100 |
| Electronics and appliance stores [443] | $1,000 | 1,900 |
| Building material and garden equipment and supplies dealers [444] | $440 | 6,400 |
| Supermarkets and other grocery (except convenience) stores [44511] | $720 | 11,800 |
| Convenience stores [44512] | $890 | 600 |
| Specialty food stores [4452] | $670 | 600 |
| Beer, wine and liquor stores [4453] | $940 | 1,800 |
| Health and personal care stores [446] | $890 | 2,600 |
| Clothing and clothing accessories stores [448] | $560 | 5,500 |
| Sporting goods, hobby, book and music stores [451] | $500 | 2,700 |
| General merchandise stores [452] | $500 | 13,600 |
| Miscellaneous store retailers [453] | $560 | 2,200 |
| NET WARRANTED RETAIL FLOOR AREA - Above Categories (Nearest 100 sf) | | **71,300** |

Source: Colliers International Consulting





## 14. South Clearbrook
### Growth in Annual Resident Expenditure Potential (2014-2035)

| | 2014 | 2035 |
|---|---|---|
| POPULATION | 7,800 | 10,100 |
| INCOME (PDI) | $ 20,658 | $ 25,459 |
| TOTAL INCOME POTENTIAL | $161,130,860 | $257,130,940 |
| RETAIL SALES / INCOME | 47.0% | 47.0% |
| TOTAL RETAIL POTENTIAL | **$75,807,100** | **$120,972,100** |
| Motor vehicle and parts dealers [441] | $ 23,706,605 | $ 37,830,728 |
| Furniture and home furnishings stores [442] | $ 2,737,716 | $ 4,368,816 |
| Electronics and appliance stores [443] | $ 2,935,974 | $ 4,685,194 |
| Building material and garden equipment and supplies dealers [444] | $ 4,266,537 | $ 6,808,491 |
| Food and beverage stores [445] | $ 15,585,131 | $ 24,870,574 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 11,506,557 | $ 18,362,032 |
| Convenience stores [44512] | $ 860,565 | $ 1,373,280 |
| Specialty food stores [4452] | $ 587,304 | $ 937,213 |
| Beer, wine and liquor stores [4453] | $ 2,630,706 | $ 4,198,050 |
| Health and personal care stores [446] | $ 3,471,688 | $ 5,540,081 |
| Gasoline stations [447] | $ 11,105,482 | $ 17,722,000 |
| Clothing and clothing accessories stores [448] | $ 4,737,378 | $ 7,559,854 |
| Sporting goods, hobby, book and music stores [451] | $ 2,080,403 | $ 3,319,884 |
| General merchandise stores [452] | $ 10,360,838 | $ 16,533,707 |
| Miscellaneous store retailers [453] | $ 1,902,150 | $ 3,035,429 |
| TOTAL - MAJOR RETAIL CATEGORIES (3-Digit NAICS Codes, Some 4-Digit C | **$ 82,890,000** | **$ 132,275,000** |

Source: Colliers International Consulting

## 14. South Clearbrook
### Projected Resident Sales Capture by Relevant Category

| Major Retail Category | 2014 | 2035 | Incremental Demand |
|---|---|---|---|
| Motor vehicle and parts dealers [441] | $ 23,706,605 | $ 37,830,728 | $ 14,124,123 |
| Furniture and home furnishings stores [442] | $ 2,738,000 | $ 4,369,000 | $ 1,631,000 |
| Electronics and appliance stores [443] | $ 2,936,000 | $ 4,685,000 | $ 1,749,000 |
| Building material and garden equipment and supplies dealers [444] | $ 4,267,000 | $ 6,808,000 | $ 2,541,000 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 11,507,000 | $ 18,362,000 | $ 6,855,000 |
| Convenience stores [44512] | $ 861,000 | $ 1,373,000 | $ 512,000 |
| Specialty food stores [4452] | $ 587,000 | $ 937,000 | $ 350,000 |
| Beer, wine and liquor stores [4453] | $ 2,631,000 | $ 4,198,000 | $ 1,567,000 |
| Health and personal care stores [446] | $ 3,472,000 | $ 5,540,000 | $ 2,068,000 |
| Gasoline stations [447] | $ 11,105,000 | $ 17,722,000 | $ 6,617,000 |
| Clothing and clothing accessories stores [448] | $ 4,737,000 | $ 7,560,000 | $ 2,823,000 |
| Sporting goods, hobby, book and music stores [451] | $ 2,080,000 | $ 3,320,000 | $ 1,240,000 |
| General merchandise stores [452] | $ 10,361,000 | $ 16,534,000 | $ 6,173,000 |
| Miscellaneous store retailers [453] | $ 1,902,000 | $ 3,035,000 | $ 1,133,000 |
| **TOTAL, NET RETAIL EXPENDITURES - Above Categories** | **$ 82,891,000** | **$ 132,274,000** | **$ 49,383,000** |

Source: Colliers International Consulting - Rounded to nearest $1,000.

## 14. South Clearbrook
### Projected Resident Floor Area Support (nearest 1,000 SF)

| Major Retail Category | Reqm't ($/Sq. Ft.) | Incremental (2014-35) Area Support (sf) |
|---|---|---|
| Motor vehicle and parts dealers [441] | $890 | 15,900 |
| Furniture and home furnishings stores [442] | $440 | 3,700 |
| Electronics and appliance stores [443] | $1,000 | 1,700 |
| Building material and garden equipment and supplies dealers [444] | $440 | 5,800 |
| Supermarkets and other grocery (except convenience) stores [44511] | $720 | 16,000 |
| Convenience stores [44512] | $890 | 600 |
| Specialty food stores [4452] | $670 | 500 |
| Beer, wine and liquor stores [4453] | $940 | 1,700 |
| Health and personal care stores [446] | $890 | 2,300 |
| Clothing and clothing accessories stores [448] | $560 | 5,000 |
| Sporting goods, hobby, book and music stores [451] | $500 | 2,500 |
| General merchandise stores [452] | $500 | 12,300 |
| Miscellaneous store retailers [453] | $560 | 2,000 |
| **NET WARRANTED RETAIL FLOOR AREA - Above Categories (Nearest 100 sf)** | | **70,000** |

Source: Colliers International Consulting





## 15. Mill Lake
### Growth in Annual Resident Expenditure Potential (2014-2035)

| | 2014 | 2035 |
|---|---|---|
| POPULATION | 8,750 | 16,200 |
| INCOME (PDI) | $ 24,025 | $ 29,608 |
| TOTAL INCOME POTENTIAL | $210,216,570 | $479,648,120 |
| RETAIL SALES / INCOME | 46.0% | 46.0% |
| **TOTAL RETAIL POTENTIAL** | **$96,628,800** | **$220,476,600** |
| Motor vehicle and parts dealers [441] | $ 30,218,024 | $ 68,948,048 |
| Furniture and home furnishings stores [442] | $ 3,489,676 | $ 7,962,347 |
| Electronics and appliance stores [443] | $ 3,742,389 | $ 8,538,958 |
| Building material and garden equipment and supplies dealers [444] | $ 5,438,413 | $ 12,408,753 |
| Food and beverage stores [445] | $ 19,865,851 | $ 45,327,638 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 14,667,028 | $ 33,465,554 |
| Convenience stores [44512] | $ 1,096,934 | $ 2,502,859 |
| Specialty food stores [4452] | $ 748,617 | $ 1,708,109 |
| Beer, wine and liquor stores [4453] | $ 3,353,274 | $ 7,651,119 |
| Health and personal care stores [446] | $ 4,425,246 | $ 10,097,023 |
| Gasoline stations [447] | $ 14,155,790 | $ 32,299,070 |
| Clothing and clothing accessories stores [448] | $ 6,038,579 | $ 13,778,142 |
| Sporting goods, hobby, book and music stores [451] | $ 2,651,821 | $ 6,050,624 |
| General merchandise stores [452] | $ 13,206,618 | $ 30,133,357 |
| Miscellaneous store retailers [453] | $ 2,424,608 | $ 5,532,194 |
| **TOTAL - MAJOR RETAIL CATEGORIES (3-Digit NAICS Codes, Some 4-Digit C** | **$ 105,657,000** | **$ 241,076,000** |

Source: Colliers International Consulting

## 15. Mill Lake
### Projected Resident Sales Capture by Relevant Category

| Major Retail Category | 2014 | 2035 | Incremental Demand |
|---|---|---|---|
| Motor vehicle and parts dealers [441] | $ 30,218,024 | $ 68,948,048 | $ 38,730,024 |
| Furniture and home furnishings stores [442] | $ 3,490,000 | $ 7,962,000 | $ 4,472,000 |
| Electronics and appliance stores [443] | $ 3,742,000 | $ 8,539,000 | $ 4,797,000 |
| Building material and garden equipment and supplies dealers [444] | $ 5,438,000 | $ 12,409,000 | $ 6,971,000 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 14,667,000 | $ 33,466,000 | $ 18,799,000 |
| Convenience stores [44512] | $ 1,097,000 | $ 2,503,000 | $ 1,406,000 |
| Specialty food stores [4452] | $ 749,000 | $ 1,708,000 | $ 959,000 |
| Beer, wine and liquor stores [4453] | $ 3,353,000 | $ 7,651,000 | $ 4,298,000 |
| Health and personal care stores [446] | $ 4,425,000 | $ 10,097,000 | $ 5,672,000 |
| Gasoline stations [447] | $ 14,156,000 | $ 32,299,000 | $ 18,143,000 |
| Clothing and clothing accessories stores [448] | $ 6,039,000 | $ 13,778,000 | $ 7,739,000 |
| Sporting goods, hobby, book and music stores [451] | $ 2,652,000 | $ 6,051,000 | $ 3,399,000 |
| General merchandise stores [452] | $ 13,207,000 | $ 30,133,000 | $ 16,926,000 |
| Miscellaneous store retailers [453] | $ 2,425,000 | $ 5,532,000 | $ 3,107,000 |
| TOTAL, NET RETAIL EXPENDITURES - Above Categories | **$ 105,658,000** | **$ 241,076,000** | **$ 135,418,000** |

Source: Colliers International Consulting - Rounded to nearest $1,000.

## 15. Mill Lake
### Projected Resident Floor Area Support (nearest 1,000 SF)

| Major Retail Category | Reqm't ($/Sq. Ft.) | Incremental (2014-35) Area Support (sf) |
|---|---|---|
| Motor vehicle and parts dealers [441] | $890 | 43,500 |
| Furniture and home furnishings stores [442] | $440 | 10,200 |
| Electronics and appliance stores [443] | $1,000 | 4,800 |
| Building material and garden equipment and supplies dealers [444] | $440 | 15,800 |
| Supermarkets and other grocery (except convenience) stores [44511] | $720 | 20,400 |
| Convenience stores [44512] | $890 | 1,600 |
| Specialty food stores [4452] | $670 | 1,400 |
| Beer, wine and liquor stores [4453] | $940 | 4,600 |
| Health and personal care stores [446] | $890 | 6,400 |
| Clothing and clothing accessories stores [448] | $560 | 13,800 |
| Sporting goods, hobby, book and music stores [451] | $500 | 6,800 |
| General merchandise stores [452] | $500 | 33,900 |
| Miscellaneous store retailers [453] | $560 | 5,500 |
| NET WARRANTED RETAIL FLOOR AREA - Above Categories (Nearest 100 sf) | | **168,700** |

Source: Colliers International Consulting





## 16. Abbotsford Centre
### Growth in Annual Resident Expenditure Potential (2014-2035)

| | 2014 | 2035 |
|---|---|---|
| POPULATION | 8,710 | 15,200 |
| INCOME (PDI) | $ 26,465 | $ 32,616 |
| TOTAL INCOME POTENTIAL | $230,513,570 | $495,759,200 |
| RETAIL SALES / INCOME | 45.2% | 45.2% |
| TOTAL RETAIL POTENTIAL | **$104,153,000** | **$223,999,100** |
| Motor vehicle and parts dealers [441] | $ 32,571,012 | $ 70,049,614 |
| Furniture and home furnishings stores [442] | $ 3,761,407 | $ 8,089,559 |
| Electronics and appliance stores [443] | $ 4,033,798 | $ 8,675,382 |
| Building material and garden equipment and supplies dealers [444] | $ 5,861,887 | $ 12,607,004 |
| Food and beverage stores [445] | $ 21,412,746 | $ 46,051,826 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 15,809,106 | $ 34,000,225 |
| Convenience stores [44512] | $ 1,182,349 | $ 2,542,847 |
| Specialty food stores [4452] | $ 806,909 | $ 1,735,399 |
| Beer, wine and liquor stores [4453] | $ 3,614,383 | $ 7,773,359 |
| Health and personal care stores [446] | $ 4,769,827 | $ 10,258,341 |
| Gasoline stations [447] | $ 15,258,059 | $ 32,815,104 |
| Clothing and clothing accessories stores [448] | $ 6,508,785 | $ 13,998,272 |
| Sporting goods, hobby, book and music stores [451] | $ 2,858,311 | $ 6,147,293 |
| General merchandise stores [452] | $ 14,234,978 | $ 30,614,790 |
| Miscellaneous store retailers [453] | $ 2,613,405 | $ 5,620,581 |
| TOTAL - MAJOR RETAIL CATEGORIES (3-Digit NAICS Codes, Some 4-Digit C | **$ 113,884,000** | **$ 244,928,000** |

Source: Colliers International Consulting

## 16. Abbotsford Centre
### Projected Resident Sales Capture by Relevant Category

| Major Retail Category | 2014 | 2035 | Incremental Demand |
|---|---|---|---|
| Motor vehicle and parts dealers [441] | $ 32,571,012 | $ 70,049,614 | $ 37,478,602 |
| Furniture and home furnishings stores [442] | $ 3,761,000 | $ 8,090,000 | $ 4,329,000 |
| Electronics and appliance stores [443] | $ 4,034,000 | $ 8,675,000 | $ 4,641,000 |
| Building material and garden equipment and supplies dealers [444] | $ 5,862,000 | $ 12,607,000 | $ 6,745,000 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 15,809,000 | $ 34,000,000 | $ 18,191,000 |
| Convenience stores [44512] | $ 1,182,000 | $ 2,543,000 | $ 1,361,000 |
| Specialty food stores [4452] | $ 807,000 | $ 1,735,000 | $ 928,000 |
| Beer, wine and liquor stores [4453] | $ 3,614,000 | $ 7,773,000 | $ 4,159,000 |
| Health and personal care stores [446] | $ 4,770,000 | $ 10,258,000 | $ 5,488,000 |
| Gasoline stations [447] | $ 15,258,000 | $ 32,815,000 | $ 17,557,000 |
| Clothing and clothing accessories stores [448] | $ 6,509,000 | $ 13,998,000 | $ 7,489,000 |
| Sporting goods, hobby, book and music stores [451] | $ 2,858,000 | $ 6,147,000 | $ 3,289,000 |
| General merchandise stores [452] | $ 14,235,000 | $ 30,615,000 | $ 16,380,000 |
| Miscellaneous store retailers [453] | $ 2,613,000 | $ 5,621,000 | $ 3,008,000 |
| TOTAL, NET RETAIL EXPENDITURES - Above Categories | **$ 113,883,000** | **$ 244,927,000** | **$ 131,044,000** |

Source: Colliers International Consulting - Rounded to nearest $1,000.

## 16. Abbotsford Centre
### Projected Resident Floor Area Support (nearest 1,000 SF)

| Major Retail Category | Reqm't ($/Sq. Ft.) | Incremental (2014-35) Area Support (sf) |
|---|---|---|
| Motor vehicle and parts dealers [441] | $890 | 42,100 |
| Furniture and home furnishings stores [442] | $440 | 9,800 |
| Electronics and appliance stores [443] | $1,000 | 4,600 |
| Building material and garden equipment and supplies dealers [444] | $440 | 15,300 |
| Supermarkets and other grocery (except convenience) stores [44511] | $720 | 22,000 |
| Convenience stores [44512] | $890 | 1,500 |
| Specialty food stores [4452] | $670 | 1,400 |
| Beer, wine and liquor stores [4453] | $940 | 4,400 |
| Health and personal care stores [446] | $890 | 6,200 |
| Clothing and clothing accessories stores [448] | $560 | 13,400 |
| Sporting goods, hobby, book and music stores [451] | $500 | 6,600 |
| General merchandise stores [452] | $500 | 32,800 |
| Miscellaneous store retailers [453] | $560 | 5,400 |
| NET WARRANTED RETAIL FLOOR AREA - Above Categories (Nearest 100 sf) | | **165,500** |

Source: Colliers International Consulting





## 17. McMillan
### Growth in Annual Resident Expenditure Potential (2014-2035)

| | 2014 | 2035 |
|---|---|---|
| POPULATION | 8,040 | 10,900 |
| INCOME (PDI) | $ 36,082 | $ 44,468 |
| TOTAL INCOME POTENTIAL | $290,101,580 | $484,695,950 |
| RETAIL SALES / INCOME | 42.1% | 42.1% |
| TOTAL RETAIL POTENTIAL | **$122,123,100** | **$204,040,800** |
| Motor vehicle and parts dealers [441] | $ 38,190,671 | $ 63,808,200 |
| Furniture and home furnishings stores [442] | $ 4,410,384 | $ 7,368,780 |
| Electronics and appliance stores [443] | $ 4,729,772 | $ 7,902,407 |
| Building material and garden equipment and supplies dealers [444] | $ 6,873,271 | $ 11,483,721 |
| Food and beverage stores [445] | $ 25,107,207 | $ 41,948,612 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 18,536,739 | $ 30,970,808 |
| Convenience stores [44512] | $ 1,386,346 | $ 2,316,279 |
| Specialty food stores [4452] | $ 946,130 | $ 1,580,775 |
| Beer, wine and liquor stores [4453] | $ 4,237,993 | $ 7,080,753 |
| Health and personal care stores [446] | $ 5,592,792 | $ 9,344,324 |
| Gasoline stations [447] | $ 17,890,618 | $ 29,891,281 |
| Clothing and clothing accessories stores [448] | $ 7,631,782 | $ 12,751,027 |
| Sporting goods, hobby, book and music stores [451] | $ 3,351,471 | $ 5,599,570 |
| General merchandise stores [452] | $ 16,691,018 | $ 27,887,015 |
| Miscellaneous store retailers [453] | $ 3,064,310 | $ 5,119,787 |
| TOTAL - MAJOR RETAIL CATEGORIES (3-Digit NAICS Codes, Some 4-Digit C | **$ 133,533,000** | **$ 223,105,000** |

Source: Colliers International Consulting

## 17. McMillan
### Projected Resident Sales Capture by Relevant Category

| Major Retail Category | 2014 | 2035 | Incremental Demand |
|---|---|---|---|
| Motor vehicle and parts dealers [441] | $ 38,190,671 | $ 63,808,200 | $ 25,617,528 |
| Furniture and home furnishings stores [442] | $ 4,410,000 | $ 7,369,000 | $ 2,959,000 |
| Electronics and appliance stores [443] | $ 4,730,000 | $ 7,902,000 | $ 3,172,000 |
| Building material and garden equipment and supplies dealers [444] | $ 6,873,000 | $ 11,484,000 | $ 4,611,000 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 18,537,000 | $ 30,971,000 | $ 12,434,000 |
| Convenience stores [44512] | $ 1,386,000 | $ 2,316,000 | $ 930,000 |
| Specialty food stores [4452] | $ 946,000 | $ 1,581,000 | $ 635,000 |
| Beer, wine and liquor stores [4453] | $ 4,238,000 | $ 7,081,000 | $ 2,843,000 |
| Health and personal care stores [446] | $ 5,593,000 | $ 9,344,000 | $ 3,751,000 |
| Gasoline stations [447] | $ 17,891,000 | $ 29,891,000 | $ 12,000,000 |
| Clothing and clothing accessories stores [448] | $ 7,632,000 | $ 12,751,000 | $ 5,119,000 |
| Sporting goods, hobby, book and music stores [451] | $ 3,351,000 | $ 5,600,000 | $ 2,249,000 |
| General merchandise stores [452] | $ 16,691,000 | $ 27,887,000 | $ 11,196,000 |
| Miscellaneous store retailers [453] | $ 3,064,000 | $ 5,120,000 | $ 2,056,000 |
| TOTAL, NET RETAIL EXPENDITURES - Above Categories | **$ 133,533,000** | **$ 223,105,000** | **$ 89,573,000** |

Source: Colliers International Consulting - Rounded to nearest $1,000.

## 17. McMillan
### Projected Resident Floor Area Support (nearest 1,000 SF)

| Major Retail Category | Reqm't ($/Sq. Ft.) | Incremental (2014-35) Area Support (sf) |
|---|---|---|
| Motor vehicle and parts dealers [441] | $890 | 28,800 |
| Furniture and home furnishings stores [442] | $440 | 6,700 |
| Electronics and appliance stores [443] | $1,000 | 3,200 |
| Building material and garden equipment and supplies dealers [444] | $440 | 10,500 |
| Supermarkets and other grocery (except convenience) stores [44511] | $720 | 25,700 |
| Convenience stores [44512] | $890 | 1,000 |
| Specialty food stores [4452] | $670 | 900 |
| Beer, wine and liquor stores [4453] | $940 | 3,000 |
| Health and personal care stores [446] | $890 | 4,200 |
| Clothing and clothing accessories stores [448] | $560 | 9,100 |
| Sporting goods, hobby, book and music stores [451] | $500 | 4,500 |
| General merchandise stores [452] | $500 | 22,400 |
| Miscellaneous store retailers [453] | $560 | 3,700 |
| NET WARRANTED RETAIL FLOOR AREA - Above Categories (Nearest 100 sf) | | **123,700** |

Source: Colliers International Consulting





## 18. Whatcom
### Growth in Annual Resident Expenditure Potential (2014-2035)

| | 2014 | 2035 |
|---|---|---|
| POPULATION | 6,260 | 8,000 |
| INCOME (PDI) | $ 38,217 | $ 47,098 |
| TOTAL INCOME POTENTIAL | $239,239,090 | $376,787,640 |
| RETAIL SALES / INCOME | 41.4% | 41.4% |
| TOTAL RETAIL POTENTIAL | **$99,072,500** | **$156,033,500** |
| Motor vehicle and parts dealers [441] | $ 30,982,224 | $ 48,795,225 |
| Furniture and home furnishings stores [442] | $ 3,577,929 | $ 5,635,033 |
| Electronics and appliance stores [443] | $ 3,837,032 | $ 6,043,106 |
| Building material and garden equipment and supplies dealers [444] | $ 5,575,948 | $ 8,781,799 |
| Food and beverage stores [445] | $ 20,368,249 | $ 32,078,824 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 15,037,950 | $ 23,683,908 |
| Convenience stores [44512] | $ 1,124,675 | $ 1,771,299 |
| Specialty food stores [4452] | $ 767,549 | $ 1,208,846 |
| Beer, wine and liquor stores [4453] | $ 3,438,077 | $ 5,414,773 |
| Health and personal care stores [446] | $ 4,537,159 | $ 7,145,765 |
| Gasoline stations [447] | $ 14,513,783 | $ 22,858,376 |
| Clothing and clothing accessories stores [448] | $ 6,191,292 | $ 9,750,929 |
| Sporting goods, hobby, book and music stores [451] | $ 2,718,885 | $ 4,282,087 |
| General merchandise stores [452] | $ 13,540,607 | $ 21,325,679 |
| Miscellaneous store retailers [453] | $ 2,485,925 | $ 3,915,189 |
| TOTAL - MAJOR RETAIL CATEGORIES (3-Digit NAICS Codes, Some 4-Digit C | **$ 108,329,000** | **$ 170,612,000** |

Source: Colliers International Consulting

## 18. Whatcom
### Projected Resident Sales Capture by Relevant Category

| Major Retail Category | 2014 | 2035 | Incremental Demand |
|---|---|---|---|
| Motor vehicle and parts dealers [441] | $ 30,982,224 | $ 48,795,225 | $ 17,813,000 |
| Furniture and home furnishings stores [442] | $ 3,578,000 | $ 5,635,000 | $ 2,057,000 |
| Electronics and appliance stores [443] | $ 3,837,000 | $ 6,043,000 | $ 2,206,000 |
| Building material and garden equipment and supplies dealers [444] | $ 5,576,000 | $ 8,782,000 | $ 3,206,000 |
| Supermarkets and other grocery (except convenience) stores [44511] | $ 15,038,000 | $ 23,684,000 | $ 8,646,000 |
| Convenience stores [44512] | $ 1,125,000 | $ 1,771,000 | $ 646,000 |
| Specialty food stores [4452] | $ 768,000 | $ 1,209,000 | $ 441,000 |
| Beer, wine and liquor stores [4453] | $ 3,438,000 | $ 5,415,000 | $ 1,977,000 |
| Health and personal care stores [446] | $ 4,537,000 | $ 7,146,000 | $ 2,609,000 |
| Gasoline stations [447] | $ 14,514,000 | $ 22,858,000 | $ 8,344,000 |
| Clothing and clothing accessories stores [448] | $ 6,191,000 | $ 9,751,000 | $ 3,560,000 |
| Sporting goods, hobby, book and music stores [451] | $ 2,719,000 | $ 4,282,000 | $ 1,563,000 |
| General merchandise stores [452] | $ 13,541,000 | $ 21,326,000 | $ 7,785,000 |
| Miscellaneous store retailers [453] | $ 2,486,000 | $ 3,915,000 | $ 1,429,000 |
| **TOTAL, NET RETAIL EXPENDITURES - Above Categories** | **$ 108,330,000** | **$ 170,612,000** | **$ 62,282,000** |

Source: Colliers International Consulting - Rounded to nearest $1,000.

## 18. Whatcom
### Projected Resident Floor Area Support (nearest 1,000 SF)

| Major Retail Category | Reqm't ($/Sq. Ft.) | Incremental (2014-35) Area Support (sf) |
|---|---|---|
| Motor vehicle and parts dealers [441] | $890 | 20,000 |
| Furniture and home furnishings stores [442] | $440 | 4,700 |
| Electronics and appliance stores [443] | $1,000 | 2,200 |
| Building material and garden equipment and supplies dealers [444] | $440 | 7,300 |
| Supermarkets and other grocery (except convenience) stores [44511] | $720 | 20,900 |
| Convenience stores [44512] | $890 | 700 |
| Specialty food stores [4452] | $670 | 700 |
| Beer, wine and liquor stores [4453] | $940 | 2,100 |
| Health and personal care stores [446] | $890 | 2,900 |
| Clothing and clothing accessories stores [448] | $560 | 6,400 |
| Sporting goods, hobby, book and music stores [451] | $500 | 3,100 |
| General merchandise stores [452] | $500 | 15,600 |
| Miscellaneous store retailers [453] | $560 | 2,600 |
| **NET WARRANTED RETAIL FLOOR AREA - Above Categories (Nearest 100 sf)** | | **89,200** |

Source: Colliers International Consulting





## City of Abbotsford
### Restaurant Food & Beverage Expenditure Potential
### Incremental Growth (2014-2030)

| Community | Per Cap F&B Spending 2014 | Per Cap F&B Spending 2035 | Population 2014 | Population 2035 | F&B Spending Potential ($000s) 2014 | F&B Spending Potential ($000s) 2035 | Incremental Growth | Supportable Floor Area (SF) |
|---|---|---|---|---|---|---|---|---|
| 1. Bradner-Mt. Lehman | $1,201 | $1,480 | 3,950 | 4,100 | $4,744,000 | $6,068,000 | $1,324,000 | 1,800 |
| 2. Matsqui Prairie | $606 | $747 | 2,130 | 2,200 | $1,291,000 | $1,643,000 | $352,000 | 500 |
| 3. Sumas Mountain | $945 | $1,164 | 4,250 | 13,600 | $4,015,000 | $15,833,000 | $11,818,000 | 16,300 |
| 4. Sumas Prairie | $615 | $759 | 3,460 | 3,500 | $2,130,000 | $2,655,000 | $525,000 | 700 |
| 5. South Poplar | $956 | $1,178 | 8,080 | 13,000 | $7,722,000 | $15,311,000 | $7,589,000 | 10,500 |
| 6. Aberdeen | $710 | $875 | 6,305 | 7,900 | $4,475,000 | $6,909,000 | $2,434,000 | 3,400 |
| 7. West Townline | $659 | $813 | 10,410 | 12,800 | $6,864,000 | $10,401,000 | $3,537,000 | 4,900 |
| 8. East Townline | $644 | $794 | 11,465 | 12,100 | $7,383,000 | $9,603,000 | $2,220,000 | 3,100 |
| 9. Fairfield | $771 | $950 | 9,075 | 9,700 | $6,998,000 | $9,219,000 | $2,221,000 | 3,100 |
| 10. Old Clayburn | $838 | $1,033 | 17,325 | 22,500 | $14,517,000 | $23,234,000 | $8,717,000 | 12,000 |
| 11. West Clearbrook | $712 | $878 | 6,010 | 7,000 | $4,279,000 | $6,143,000 | $1,864,000 | 2,600 |
| 12. Clearbrook Centre | $738 | $910 | 12,750 | 23,200 | $9,415,000 | $21,113,000 | $11,698,000 | 16,100 |
| 13. Babich | $858 | $1,057 | 5,230 | 8,000 | $4,487,000 | $8,458,000 | $3,971,000 | 5,500 |
| 14. South Clearbrook | $706 | $870 | 7,800 | 10,100 | $5,508,000 | $8,789,000 | $3,281,000 | 4,500 |
| 15. Mill Lake | $818 | $1,008 | 8,750 | 16,200 | $7,156,000 | $16,329,000 | $9,173,000 | 12,700 |
| 16. Abbotsford Centre | $868 | $1,070 | 8,710 | 15,200 | $7,564,000 | $16,267,000 | $8,703,000 | 12,000 |
| 17. McMillan | $981 | $1,209 | 8,040 | 10,900 | $7,890,000 | $13,183,000 | $5,293,000 | 7,300 |
| 18. Whatcom | $1,066 | $1,313 | 6,260 | 8,000 | $6,670,000 | $10,505,000 | $3,835,000 | 5,300 |
| **Total - City of Abbotsford** | | | **140,000** | **200,000** | **$113,108,000** | **$201,663,000** | **$88,555,000** | **122,100** |

Note: Supportable floor area based on 100% capture, sales productivity per sf of: $ 725
Source: City-supplied community boundary files, Environics 2014 data estimates for household spending on food and beverage, Colliers calculations.

## Total Market Supportable Floor Area By Recommended Product Type

**City of Abbotsford**
**Market-Supportable Floor Space By Recommended Product Type**

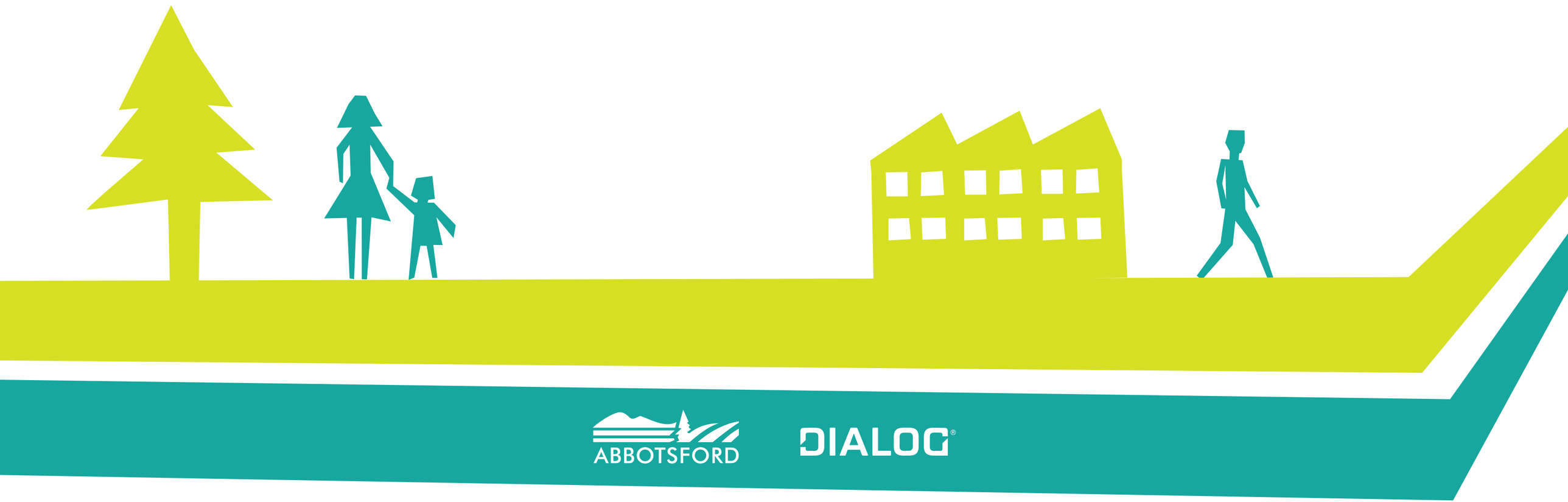
| Retail-Commercial Category | Total Floor Area Support By Development Format (SF): Stand-Alone or Specialty Cluster | Mixed-Use / Street District | Neighbourhood Shopping Centre | Community Shopping Centre | Total By Category |
|---|---|---|---|---|---|
| Motor vehicle and parts dealers [441] | 149,840 | 37,460 | 0 | 0 | 187,300 |
| Furniture and home furnishings stores [442] | 4,390 | 13,170 | 13,170 | 13,170 | 43,900 |
| Electronics and appliance stores [443] | 2,630 | 5,260 | 7,890 | 10,520 | 26,300 |
| Building material and garden equipment and supplies dealers [444] | 25,680 | 8,560 | 8,560 | 42,800 | 85,600 |
| Supermarkets and other grocery (except convenience) stores [44511] | 26,980 | 53,960 | 134,900 | 53,960 | 269,800 |
| Convenience stores [44512] | 1,280 | 6,400 | 2,560 | 2,560 | 12,800 |
| Specialty food stores [4452] | 1,020 | 5,100 | 3,060 | 1,020 | 10,200 |
| Beer, wine and liquor stores [4453] | 3,720 | 14,880 | 11,160 | 7,440 | 37,200 |
| Health and personal care stores [446] | 10,400 | 10,400 | 15,600 | 15,600 | 52,000 |
| Clothing and clothing accessories stores [448] | 0 | 23,840 | 11,920 | 23,840 | 59,600 |
| Sporting goods, hobby, book and music stores [451] | 3,700 | 9,250 | 9,250 | 14,800 | 37,000 |
| General merchandise stores [452] | 43,760 | 21,880 | 21,880 | 131,280 | 218,800 |
| Miscellaneous store retailers [453] | 3,030 | 9,090 | 9,090 | 9,090 | 30,300 |
| Restaurant Food & Beverage Support | 12,230 | 24,460 | 12,230 | 12,230 | 61,150 |
| Service-Commercial / Locally-Serving Office Support (% of above) | 67,920 | 67,920 | 101,880 | 101,880 | 339,600 |
| **Floor Area Totals By Development Format** | **357,000** | **312,000** | **363,000** | **440,000** | |
| Blended Average FSR by Development Format | 0.25 | 0.40 | 0.28 | 0.28 | |
| Estimated Site Area Requirement (to nearest 1,000 SF) | 1,428,000 | 780,000 | 1,296,000 | 1,571,000 | |
| ***Estimated Site Area Requirement (hectares)*** | ***13*** | ***7*** | ***12*** | ***15*** | ***47*** |
| ***Estimated Site Area Requirement (acres)*** | ***33*** | ***18*** | ***30*** | ***36*** | ***116*** |

**Source: Colliers International Consulting.**

**City of Abbotsford**
**Market-Supportable Floor Space By Recommended Product Type**

| Retail-Commercial Category | Total Floor Area Support By Development Format (Sq. M.): Stand-Alone or Specialty Cluster | Mixed-Use / Street District | Neighbourhood Shopping Centre | Community Shopping Centre | Total By Category |
|---|---|---|---|---|---|
| Motor vehicle and parts dealers [441] | 13,921 | 3,480 | 0 | 0 | 17,401 |
| Furniture and home furnishings stores [442] | 408 | 1,224 | 1,224 | 1,224 | 4,078 |
| Electronics and appliance stores [443] | 244 | 489 | 733 | 977 | 2,443 |
| Building material and garden equipment and supplies dealers [444] | 2,386 | 795 | 795 | 3,976 | 7,953 |
| Supermarkets and other grocery (except convenience) stores [44511] | 2,507 | 5,013 | 12,533 | 5,013 | 25,065 |
| Convenience stores [44512] | 119 | 595 | 238 | 238 | 1,189 |
| Specialty food stores [4452] | 95 | 474 | 284 | 95 | 948 |
| Beer, wine and liquor stores [4453] | 346 | 1,382 | 1,037 | 691 | 3,456 |
| Health and personal care stores [446] | 966 | 966 | 1,449 | 1,449 | 4,831 |
| Clothing and clothing accessories stores [448] | 0 | 2,215 | 1,107 | 2,215 | 5,537 |
| Sporting goods, hobby, book and music stores [451] | 344 | 859 | 859 | 1,375 | 3,437 |
| General merchandise stores [452] | 4,065 | 2,033 | 2,033 | 12,196 | 20,327 |
| Miscellaneous store retailers [453] | 281 | 844 | 844 | 844 | 2,815 |
| Restaurant Food & Beverage Support | 1,136 | 2,272 | 1,136 | 1,136 | 5,681 |
| Service-Commercial / Locally-Serving Office Support (% of above) | 6,310 | 6,310 | 9,465 | 9,465 | 31,550 |
| **Floor Area Totals By Development Format** | **33,000** | **29,000** | **34,000** | **41,000** | |
| Blended Average FSR by Development Format | 0.25 | 0.40 | 0.28 | 0.28 | |
| Estimated Site Area Requirement (to nearest 1,000 sq. metres) | 133,000 | 72,000 | 120,000 | 146,000 | |
| ***Estimated Site Area Requirement (hectares)*** | ***13*** | ***7*** | ***12*** | ***15*** | ***47*** |
| ***Estimated Site Area Requirement (acres)*** | ***33*** | ***18*** | ***30*** | ***36*** | ***116*** |

**Source: Colliers International Consulting.**



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