Commercial Market Study

Bragg Creek Hamlet & Expansion Lands

Date: April 2025

Prepared for: Rocky View County

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tate research

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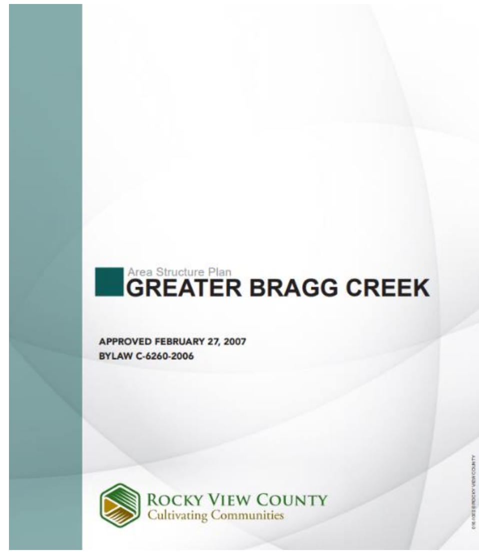
1 Executive Summary

1.1 Background

Rocky View County is updating the Greater Bragg Creek Area Structure Plan ("Bragg Creek ASP"). The Bragg Creek ASP was adopted in 2007. Bragg Creek is located approximately 30 kilometres southwest of the City of Calgary. The Bragg Creek ASP is bound on the west by Kananaskis Country, on the south by the Municipal District of Foothills, on the east by the Tsuut'ina Nation, and on the north by a block of agricultural lands.


Area Structure Plan
GREATER BRAGG CREEK
APPROVED FEBRUARY 27, 2007
BYLAW C-6260-2006
Rocky View County
Cultivating Communities

The Bragg Creek ASP is being updated to explore the potential land use scenarios for the hamlet expansion area in accordance with the Bragg Creek ASP and the Bragg Creek Revitalization Plan. The result will be specific policies to guide the development of the expansion lands. The hamlet expansion area is approximately 86 hectares (214 acres) and consists of approximately 20 parcels ("Expansion Lands").

Tate Research ("TR") has been retained to prepare a Commercial Market Demand Study as a component of the Bragg Creek ASP review. The purpose of this study is to provide effective strategies to assist in the development of the Bragg Creek community, specifically the Hamlet and Expansion Lands and guide future commercial development.

1.2 Summary of Findings

The findings of the background research and analysis are summarized as follows:

1.2.1. Policy Context

Bragg Creek is a rural hamlet characterized by agriculture, nature, estate homes and a commercial core. The commercial core provides retail and service offerings to local residents, as well as visitors, the majority of which are tourists. The

Revitalization Plan envisions the future of Bragg Creek as a growing community centered around a mixed-use village with residential, retail and recreational uses.

Rendering from the Bragg Creek Revitalization Plan

1.2.2. Macro-Economic Analysis

The demand for retail space in Bragg Creek is influenced by local market conditions as well as economic factors occurring at a regional scale. The economic market conditions in the Calgary CMA are influenced by complex factors including the oil industry and other economic factors such as inter-provincial migration. Generally, the Calgary CMA, and Rocky View County specifically, are anticipated to experience population and employment growth.

1.2.3. Retail Trends and Activations

Bragg Creek is already capitalizing on many retail trends with the presence of local restaurants, art galleries, maker spaces, and hand crafted goods. This should be further encouraged through flexible zoning policies and building standards. Some of the trends such as pop-up markets and technology driven ground floors may be solutions for Bragg Creek where demand for goods and services is often seasonal.

1.2.4. Supply Analysis

The Bragg Creek Hamlet includes range of retail and service tenants that serve local residents, as well as visitors. However, many Bragg Creek Hamlet and larger ASP residents conduct their weekly shopping

Suncatcher’s Design Studio, Bragg Creek

needs at major retail nodes in Calgary and Cochrane. There is approximately 120,000 square feet of existing retail commercial space in the Bragg Creek Hamlet. There are three retail commercial developments proposed in the Bragg Creek Hamlet which have the potential to introduce nearly 50,000 square feet of new retail commercial space.

1.2.5. Demand Generators

Demand for commercial space within the Bragg Creek Hamlet and Expansion Lands will be primarily generated by population growth and to a lessor extent, tourism and pass-by traffic.

While the focus of this study is on the commercial demand in the Hamlet and Expansion Lands, TR has accounted for demand generated by population growth in the entire ASP. There is population growth forecast within the Bragg Creek Hamlet and larger ASP and the tourism industry is anticipated to be strong in the face of current geo-political issues. These factors will provide support for commercial space in Bragg Creek.

1.2.6. Market Demand Analysis

Industry standard benchmarks for commercial space required per person, indicate that the Bragg Creek Hamlet and larger ASP is well served with respect to commercial space. Some retail commercial categories such as restaurants exceed the benchmark levels. This reflects the tourism function of the area.

Future population growth will require additional retail commercial space. Depending on the population growth scenario, the market demand analysis indicates that current and future Bragg Creek Hamlet and larger ASP residents can support between 41,800 to 68,900 square feet of new commercial space by 2051.

1.2.7. Strategic Recommendations

TR has identified a low and high population growth scenario for Bragg Creek (Hamlet + Expansion Lands) and the larger ASP. Depending on the scenario, the population of Bragg Creek is expected to grow by an additional 1,170 to 2,100 persons by 2051. In both scenarios, the resulting population is relatively small and therefore, it will be challenging from a retailer viability perspective. From a County planning perspective, the aspiration is to ensure that residents are well served and can achieve daily and weekly shopping within their community.

However, in a Hamlet such as Bragg Creek, retailers will find it difficult to remain viable, especially in the face of seasonal demand.

The following summarizes our strategic recommendations which will enhance the commercial environment of Bragg Creek, increase its competitive advantage, and support its ability to serve residents and visitors over the planning horizon:

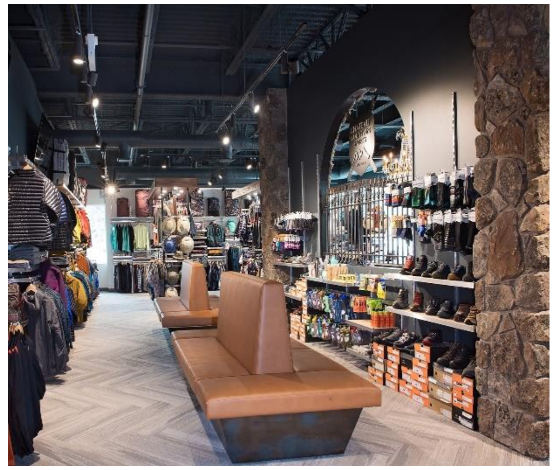
- It is recommended that new retail commercial space be concentrated within the Hamlet Core. Clustering retail commercial space within the Hamlet Core will support its viability by creating synergies between businesses, enhancing its public realm and walkability and creating connections with the Elbow River. There is an opportunity to intensify the north side of Balsam Avenue, capitalizing on the location of the proposed Gateway Village, The Laskin, and Bragg Creek Distillers, as well as the existing Bragg Creek Shopping Centre.

- Temporary Use Strategy: Bragg Creek is a seasonal tourism destination that experiences an inflow of visitor traffic in the summer. Temporary uses, such as a pop-up market or micro retail units, can enhance the retail offering during the summer months making Bragg Creek a more attractive place to live and visit.

SWS Pop-Up, Muskoka

Passion for Glass, Calgary

- Artisanal Uses: The Bragg Creek Hamlet has a strong presence of artisanal uses with art galleries, maker spaces, and hand crafted goods. The County should continue to support these types of uses through flexible Land Use Bylaws typified by artisanal and light manufacturing Bylaws. Land Use Bylaws should permit multi-use spaces that include retail, as well as production. This may include uses such as coffee roasting, alcohol production, glass blowing, and others.



Chateau Mountain Sports, Canmore

- Connecting the Retail Experience to the Outdoors: Bragg Creek is a well known destination for outdoor activities, including hiking, mountain biking, horseback riding, cross country skiing and snowshoeing. There may be an opportunity to actively target sporting goods stores, such as clothing or equipment rentals, or businesses that offer tours, guides, and other experiences.

- Evening Economy: Currently, it would be challenging to develop a viable evening economy in Bragg Creek. There is a lack of overnight accommodation in Bragg Creek which limits tourism to day trips. However, there are two proposed developments that include overnight accommodations, Gateway Village and The Laskin. These developments will generate more overnight trips creating new opportunities to enhance the evening economy in Bragg Creek.

- Management Organization: There is no single entity officially tasked with guiding or assisting with business or property development or with marketing Bragg Creek. Such an organization would be highly advantageous for Bragg Creek, playing a central role in programming and events, guiding property renovations and attracting new tenants, aligning businesses in terms of store hours, and many other factors.

Lilac Festival, 4th Street BIA, Calgary

- Density: Creating a more walkable and compact Hamlet Core can be achieved by increasing density and introducing a mix of uses. Mixed-use development, whether in the form of low-rise buildings with ground floor commercial or live-work units, should be encouraged. This will activate the street edge, create pedestrian connections, and diversify the economy of Bragg Creek.

- Land Use Districts: The Commercial, Local Urban District (C-LUD) is the only commercial Land Use District in the Study Area. It permits a wide range of commercial uses but does not permit residential. A Commercial, Mixed Urban District (C-MIX) designation, with a special provision requiring a non-residential component for new developments, may be more appropriate within the Hamlet Core.

2 Policy Context

This section of the report outlines the existing planning policy context that guides development in Rocky View County and more specifically, within Bragg Creek. This planning framework is being reviewed through the Bragg Greek ASP update and will likely change in order to meet newly defined goals for the area. However, it is currently in effect and therefore has been addressed in this report.

2.1 County Plan

The Rocky View County Plan was adopted in 2013 and amended by Rocky View County Council in 2023 ("County Plan"). The County Plan provides the policy framework for growth, land use planning and service delivery in Rocky View County. The County Plan directs residential growth towards the established Hamlet and Country Residential communities.

Bragg Creek is defined in the County Plan as a Hamlet. Section 5 of the County Plan states that Hamlets are "characterized as having primarily residential development with a main street, crossroads, or central gathering area (section 9). There may be an associated business park with commercial/industrial uses." In order to retain the rural character of Hamlets the total population should be within 5,000 to 10,000 residents. This figure is based on a variety of factors, such as population goals, community input, local commercial service requirements, and infrastructure capacity. The goals of Hamlets are to:

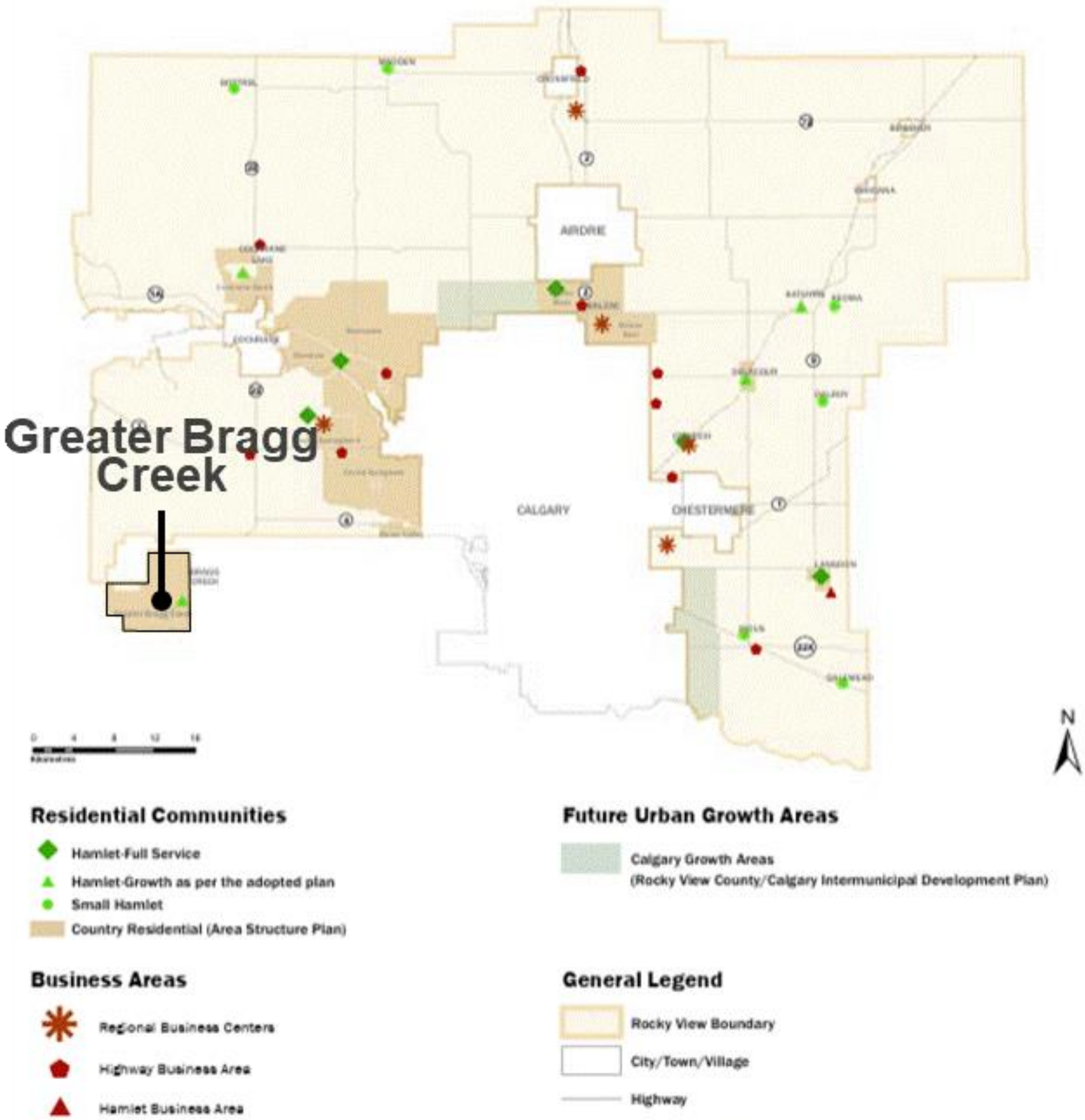
- Maintain and develop a strong sense of community identity and support their role as service hubs for the surrounding agricultural regions; and,
- Maintain and develop attractive, high quality built environments and distinct, safe residential neighbourhoods.

With respect to Bragg Creek, Section 9.2 states the intent to: "Support the development of the Hamlets of Bragg Creek, Cochrane Lake, Kathyrn, Delacour, Dalroy, and Indus as small rural communities with basic services, in accordance with their area structure plan or conceptual scheme." Permitted land uses include residential, local commercial, institutional and community, recreational and cultural, and light industrial. Additionally, the objectives of Hamlets are to encourage a variety of housing forms to provide a range of affordability and lifestyle opportunities, support local employment and small business opportunities, and encourage well-designed public gathering places.

Services in Hamlets are intended to be rural in nature and not necessarily equivalent to those in urban areas.

Bragg Creek is located within Central West Rocky View which includes six area structure plans that encompass a considerable amount of undeveloped land, the majority of which is identified for future homes. Growth pressures within Central West Rocky View include demand for non-traditional country residential

Figure 2-1: Rocky View County Growth Structure



Source: Tate Research based on Rocky View County, County Plan, 2023.

development within area structure plans, commercial growth along highways, and additional residential growth pressure outside of existing planned areas.

Key directions for Central West Rocky View include supporting the viability of the Hamlet of Bragg Creek commercial area through the development of the Hamlet and surrounding area.

2.2 Greater Bragg Creek Area Structure Plan

The Bragg Creek ASP was adopted in 2007. It establishes a land use framework for Bragg Creek and guides future growth and development in the community. Bragg Creek includes three primary residential neighbourhoods and a commercial core that provides goods and services to local residents, visitors, and tourists. The natural landscape of Bragg Creek allows for recreational industries such as the Bragg Creek Provincial Park and the Wintergreen Golf Course.

The build-out population includes the Hamlet Residential Expansion area. The Hamlet Residential Expansion area is intended to accommodate future residential development within Bragg Creek. Development of the Hamlet Residential Expansion can not occur until the completion of a Hamlet Residential Expansion Strategy, which is currently underway, and will determine the appropriate range of residential and institutional land uses. The draft Hamlet Residential Expansion Strategy has been completed; however, the project has been put on hold until the approval of the draft Regional Growth Plan.

Section 7.3 of the Bragg Creek ASP outlines policies for Hamlet Commercial Development. The vision for Hamlet Commercial Development includes maintaining a concentrated commercial core with unique character and small town atmosphere, creating attractive and comfortable public spaces, and providing overnight accommodation which is seen as an integral component of the viability of commercial businesses in the Hamlet.

Section 7.3.2 states that with the exception of bed and breakfasts and home based businesses, commercial, institutional, and mixed-use development should be located in the Hamlet Core. Figure 2-2, on the following page, indicates the Hamlet Core. A wide range of retail and service uses are permitted. Uses that are not supported include the following:

- Amusement and entertainment;
- Auctioneering;

- Automotive services;
- Outdoor storage;
- Drive through restaurant;
- Truck trailer services; and,
- Warehouse stores.

Figure 2-2: Bragg Creek Hamlet Core

Source: Tate Research based on Greater Bragg Creek Area Structure Plan, 2007.

2.3 Rocky View County Land Use Bylaw

The Rocky View County Land Use Bylaw regulates land use and development within Rocky View County. Within the Hamlet Core of Bragg Creek, there are two Land Use Districts that permit commercial uses, which are described below:

C-LUD: Commercial, Local Urban District

- Purpose: "To accommodate small scale business within Hamlets and comprehensively planned area, in a manner sensitive to adjacent uses."

B-REC: Business, Recreational District

- Purpose: "To provide local and regional recreational services, tourism opportunities, and entertainment services."

The Direct Control Land Use District is site specific and can permit commercial uses.

DC: Direct Control

- Purpose: "To provide for development with unique characteristics, unusual site conditions or innovative design that require specific regulations unavailable in other Districts."

2.4 Hamlet of Bragg Creek Revitalization Plan

The Hamlet of Bragg Creek Revitalization Plan ("Revitalization Plan") was prepared in 2015 to invigorate the community and economy for long term health and resilience. The overarching principle is that successful community revitalization is led by public realm improvements and private investment follows. The vision for the Hamlet includes fostering a distinct character, creating a connected and walkable community, sustaining a thriving local economy, and bringing the community together.

The following section summarizes recommendations that relate to commercial development in Bragg Creek. Section 1.3 of the Revitalization Plan provides recommendations for the six character areas in Bragg Creek. There are two character areas that include retail space: Hamlet Core and Hamlet Heritage Mile, which are described below:

> "The **Hamlet Core** is physically compact and the commercial heart of the Hamlet. Future development should aim to enhance this quality, improving

> pedestrian connections and public space to foster a truly vibrant downtown area. The Elbow River is a prominent feature, and new development should embrace its power as a public amenity – strengthening its connection to the downtown core.
>
> **Hamlet Heritage Mile** is a secondary commercial area of historical significance, with a substantial residential component. Connectivity is a major concern, and future improvements should consider streetscape enhancements and how to manage parking effectively, in addition to residential infill."

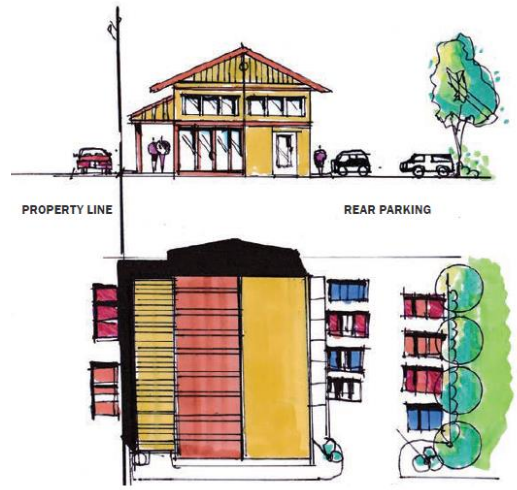
The key visions for the Hamlet Core include creating a compact, mixed-use area, improving connections, creating central open spaces, establishing riverfront access, increasing density and affordability of housing, and celebrating the unique identity of Bragg Creek. Figure 2-3, below, indicates the Bragg Creek Hamlet Core Concept Revitalization Plan which was created during the April 2015 design charrette.

Figure 2-3: Hamlet Core Concept Plan

Source: Tate Research based on Hamlet of Bragg Creek Revitalization Plan, 2015.

2.5 Hamlet of Bragg Creek Design Standards

As recommended in the Revitalization Plan, Rocky View County published the Hamlet of Bragg Creek Design Standards ("Design Standards") in 2016. The purpose of the Design Standards is to provide design direction for development, redevelopment, and enhancement of buildings, streetscapes, public open space, and natural areas in the Hamlet.



Building Placement, Design Standards

Section 3.2 of the Design Standards addresses commercial, institutional, mixed-use, and multi-unit residential development. The following points summarize several key design guidelines with respect to commercial and mixed-use development:

- Placement: Buildings should be situated and oriented to frame the street edge and provide an intimate, comfortable, and visually interesting streetscape.
- Scale: Buildings should be proportioned to reinforce human scale at street level and scaled to respond to existing and future development.
- Style: Buildings should reflect the local context, adopt existing cultural heritage, and fit in with surroundings to create a distinct sense of place.
- Parking: On-site parking should be visually attractive and promote safe and convenient movement for vehicles and pedestrians.
- Signage: Signs should be designed to reinforce the overall character of the Hamlet and enhance the architectural properties of a building.

2.6 Policy Context Summary

Bragg Creek is a rural hamlet characterized by agriculture, nature, estate homes and a commercial core. The commercial core provides retail and service offerings to local residents, as well as visitors and tourists. The Revitalization Plan envisions the future of Bragg Creek as a growing community centered around a mixed-use village with residential, retail and recreational uses.

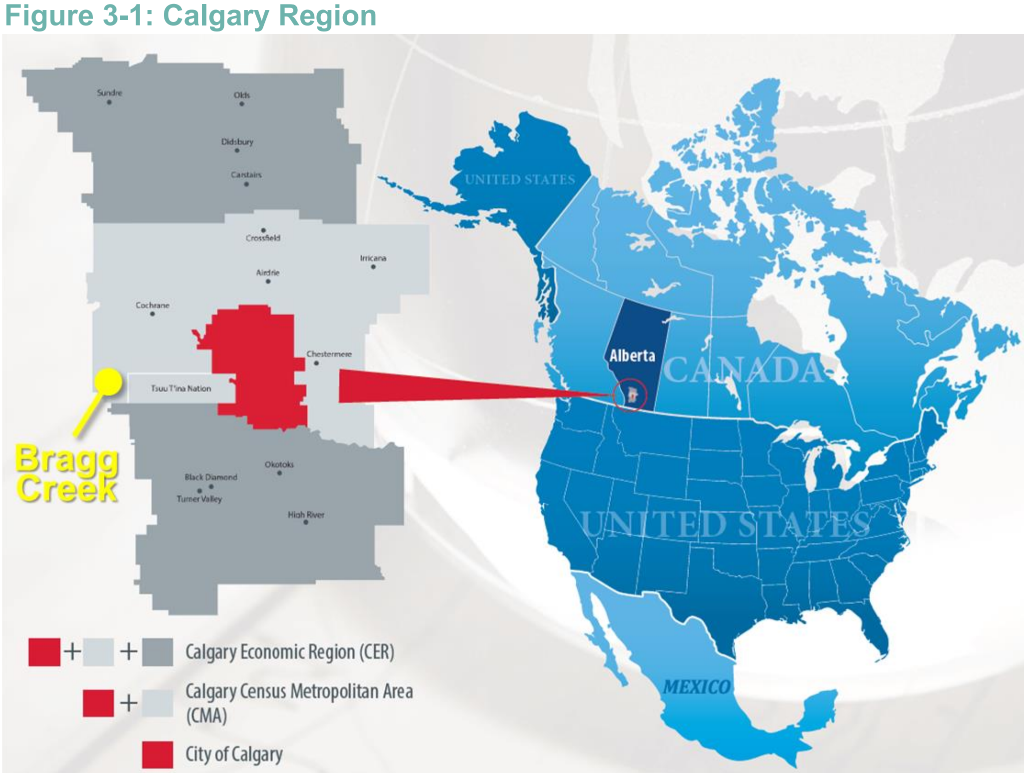
3 Macro-Economic Analysis

The following section of the report provides a high level assessment of factors influencing demand for retail commercial space in Bragg Creek and the broader region. Generally, the demand for retail commercial space is driven by local market conditions. However, it is pertinent to examine trends occurring in the broader region.

3.1 Regional Economic Trends

Rocky View County is located within the Calgary Census Metropolitan Area ("Calgary CMA") which is indicated in Figure 3-1, below. The Calgary CMA includes Calgary, Rocky View County, Airdrie, Chestermere, Cochrane, Crossfield, Irricana, and Tsuu T'ina Nation.

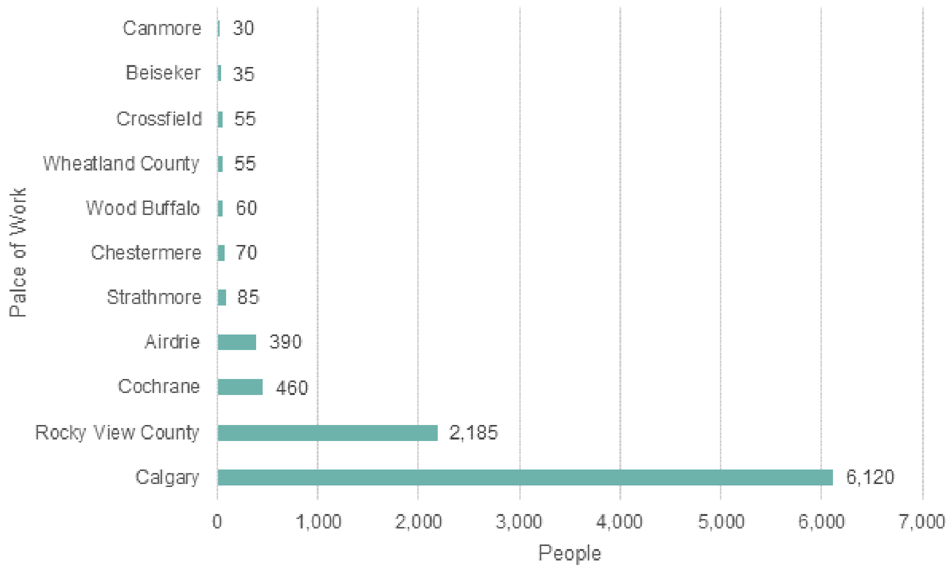
Figure 3-1: Calgary Region



Source: Tate Research; Basemap: Calgary and Region Economic Outlook 2021-2026, Fall 2021.

Rocky View County is integrated into the economy of the Calgary CMA. Figure 3-2, below, indicates the commuting flow from Rocky View County. This data indicates Calgary is the largest place of work for residents of Rocky View County. Other notable places of work include Rocky View County, Cochrane, and Airdrie.

Figure 3-2: Rocky View Commuting Flow



Source: Tate Research, based on Statistics Canada Census of Population, 2021.
* Employed labour force aged 15 years and over having a usual place of work, in private households.

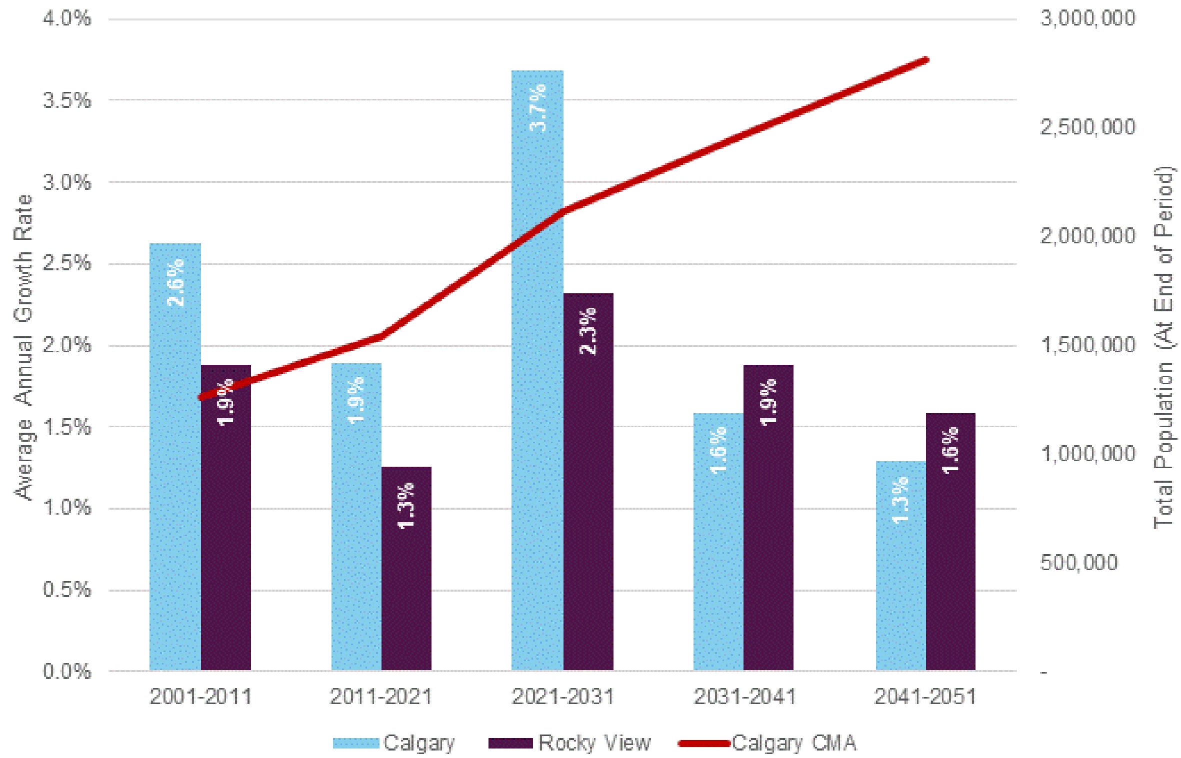
3.2 Population Trends

Typically, demand for retail commercial space is driven by population growth while other factors, such as employment, tourism, and demographics are secondary. The Calgary CMA has experienced significant population growth over the last two decades and is forecast to continue growing for the foreseeable future. Over the period of 2001 to 2021, the population of the Calgary CMA grew by approximately 285,000 people, or 29%. Over the period of 2021 to 2051, the population of the Calgary CMA is forecast to grow by approximately 1,275,000 people, or 83%.

The City of Calgary represents the largest population base and the majority of growth in the Calgary CMA. The population of Calgary in 2021 was approximately 1,350,000 which represents nearly 90% of the total population of the Calgary CMA. The population of Calgary is forecast to grow by approximately 1,070,000 people by 2051 which represents 84% of the growth forecast in the Calgary CMA.

While Calgary represents the majority of population growth in the region, Rocky View County is experiencing significant population growth, albeit at a different scale. The population of Rocky View County has increased from approximately 31,000 people in 2001 to 41,000 in 2021. This represents growth of 10,000 people or 32%. The population of Rocky View County is forecast to grow by approximately 29,000 people over the period of 2021 to 2051 which represents growth of 71%.

Figure 3-3: Calgary CMA Population Growth



Source: Tate Research, based on rennie intelligence Calgary Metropolitan Region Board Area Projections, 2018 and Statistics Canada Census of Population, 2021.

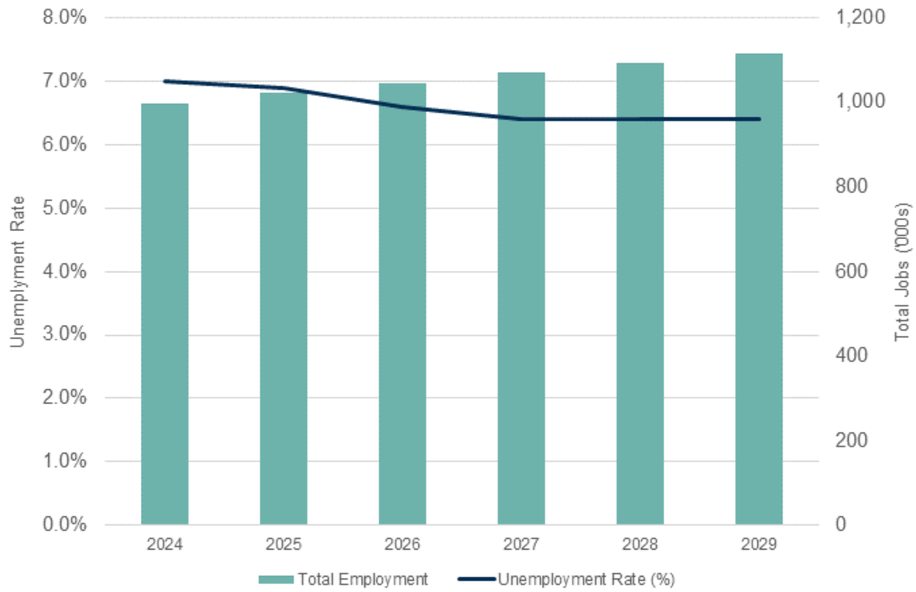
3.3 Employment Trends

Calgary is considered an open economy and is influenced by shifts occurring outside its borders. The growth of Calgary's economy is influenced by international trade and related to the export of crude oil. As such, the volatility of crude oil prices in the world market can have a significant impact on the economic growth and job market conditions in Calgary.

Figure 3-4, on the following page, indicates employment growth in the broader Calgary Economic Region. This analysis indicates that the Calgary Economic

Region is forecast to grow from 995,000 jobs in 2024 to 1,114,000 jobs in 2029 with unemployment decreasing from 7.0% to 6.4%.

Figure 3-4: Calgary Economic Region Employment Growth



Source: Tate Research based on City of Calgary, Calgary and Region Economic Outlook 2024-2029: Fall 2024.

The Calgary office market has been in a state of decline as a result of market shifts, specifically within the oil industry. This trend has been exacerbated by the Covid-19 pandemic. Figure 3-5, below, indicates historic and current downtown office vacancy in Calgary. This data indicates that office vacancy has increased from approximately 17% in 2015 to 29.5% by Q4 of 2024. Office vacancy is anticipated to decline over the next several years as Covid-19 implications are reduced.

Figure 3-5: Calgary Office Vacancy Rate

Source: Tate Research, CBRE Calgary Downtown Office Figures Q4 2024.

3.4 Macro Retail Market Conditions

Typical vacancy rates in a balanced market range between 5.0% to 7.5%. The overall vacancy rate in Calgary is 4.6%, which is the lowest rate it's been since 2017 and is indicative of a healthy market. While the overall vacancy rate seems positive, the vacancy rates vary between types of retail. For example, the vacancy rate of Downtown Streetfront retail at 16.6% which is significantly above balanced market rates and is an indication of the continued effects of Covid-19 and the trend of work from home.

Figure 3-6: Calgary Vacancy Rate by Retail Type

Retail Type	Vacancy Rate
Downtown Streetfront	16.6%
Beltline Streetfront	7.4%
Small Retail	4.8%
Downtown Shopping Centre	13.5%
Streetfront	8.9%
Neighbourhood Shopping Centre	3.1%
Community Shopping Centre	4.0%
Regional Shopping Centre	2.7%
Power Centre	1.8%
Super Regional Shopping Centre	11.9%
Total	**4.6%**

Source: Tate Research; CBRE Calgary Retail Figures H2 2024.

Another indicator of retail health is the amount of retail space in the development pipeline.

Figure 3-7: Calgary Historical Under Construction & New Supply (MSF)

Source: Tate Research; CBRE Calgary Retail Figures H2 2024.

In the City of Calgary, there is significant amount of retail space in the planning process and approximately 600,000 square feet of retail space under construction, as indicated in Figure 3-7, on the previous page. Out of 15 notable completed and under construction retail projects identified by CBRE, 12 (80% and 449,000 square feet) of them are located in west Calgary, providing ease of access to Bragg Creek.

3.5 Macro-Economic Analysis Summary

The demand for retail space in Bragg Creek is influenced by local market conditions as well as economic factors occurring at a regional scale. The economic market conditions in the Calgary CMA are influenced by complex factors including the oil industry and other factors. Generally, the Calgary CMA, and Rocky View County specifically, are anticipated to experience population and employment growth over the forecast period.

4 Retail Trends and Activations

This section of the report contains an overview of potential change agents which are relevant to the retail commercial marketplace within Bragg Creek. The identification of these change agents / trends, in addition to their implications on future requirements for retail commercial space, are valuable input into the recommendations.

In this case, a "change agent" can generally be defined as a new or emerging theme (e.g., changing demographics, new technologies, emerging trends) that may have implications for the future of commercial space in Bragg Creek.

When it comes to the retail market, the only true constant is change. From a demand perspective, technological advancements in e-commerce and multi-channel retailing are providing consumers with new non-traditional retail shopping options and product knowledge. In addition, changing socio-economic conditions, diversifying lifestyle patterns and evolving population and household demographics are just some of the many factors that are influencing Canadian retailing. It is important to recognize the need for an adaptable approach in order to meet these constant market changes.

4.1 E-Commerce and Multi-Channel Retail

- E-commerce Growth: The rise of online shopping has significantly impacted physical retail stores. In a general sense, consumers are still spending the same amount on merchandise, however, the way they make those expenditures has changed from "brick & mortar" stores (traditional retail) to online. E-commerce has meant that many non-discretionary transactional and some discretionary items can now be ordered on-line. The result is the replacement of physical store space and the rationalizing of store networks leading to reduced foot traffic in retail centres and on main streets.

- Multi-channel Strategies: To compete, many brick-and-mortar retailers are adopting multi-channel strategies, integrating their physical stores with their online presence. This includes offering services like "buy online, pick up in-store" (BOPIS), curbside pickup, and easy returns in-store for online purchases.

- For some of these stores, E-commerce has strengthened their physical presence as they are able to reach a wider audience while having a store front which is critical for customers to experience their brand in a physical setting. Their market reach has also been assisted by social media platforms which are more cost effective than traditional advertising media.

- The net result of e-commerce and the diverging retail market is that the amount of ground-oriented retail space required per person is decreasing. In a growing market this does not mean a reduction in retail space but a lesser requirement for retail space, as population growth can offset the lower per capita requirements.

> *"For a long time, retailing was the cornerstone or the foundation for placemaking. But just because you put a retail store in a certain spot doesn't mean that all of a sudden you have a great place. Now, retail continues to struggle, and the millennial generation is demanding a more qualitative experience rather than a quantitative experience: they want places that aren't necessarily about buying and selling, but rather about the experience of exchange between people."* **
>
> **ULI Placemaking

4.2 Experiential Retail

On a more localized level, there is a growing resurgence of local, independent retail and services characterized by craft / maker markets, maker spaces, boutiques and specialty food purveyors. These types of stores understand and capitalize on the power of experience and local presence.

- Focus on Experience: To attract customers, retail stores are increasingly focusing on providing unique in-store experiences that cannot be replicated online. This includes interactive displays, in-store events, personalized services, and experiential concepts like cafes or pop-up shops within stores.

- Community Engagement: Retailers are also engaging with local communities by hosting events, workshops, and collaborations with local artists or brands, creating a more personalized and memorable shopping experience.

4.3 Demographic Shifts

Changing demographics, including the growth of younger, more urban populations, are influencing retail trends. These consumers often prefer unique, independent stores over traditional chain stores, driving a shift towards more niche and personalized retail offerings.

- Millennials and Gen Z: These younger generations prioritize experience over products, value sustainability, and are tech-savvy. They often prefer unique, local, or independent stores that offer personalized experiences . This shift has led to a rise in experiential retail, where shops offer more than just products; they create engaging experiences, such as in-store events, interactive displays, and social media-friendly settings.

- Digital Natives: Gen Z and younger millennials have grown up with technology and expect a seamless integration between online and offline shopping experiences. Retailers are responding by adopting omni-channel strategies, offering services like mobile payments, online ordering with in-store pickup, and integrating technology such as augmented reality (AR) for virtual try-ons.

- Cultural Diversity: As cities become more diverse, there is a growing demand for products that reflect a wider range of cultural backgrounds. Retailers are responding by stocking a broader range of culturally specific goods, from food items to clothing and beauty products. This trend has also led to the emergence of specialty stores that cater specifically to particular ethnic or cultural groups.

- Inclusive Marketing: With more diverse demographics, retailers are increasingly adopting inclusive marketing strategies that resonate with various cultural identities and lifestyles. This includes everything from diverse representation in advertising to offering products that cater to different cultural norms and preferences.

4.4 Tenant Mix Trends

The tenant mix, whether in shopping malls, main streets or strip plazas is constantly evolving. In the points that follow, TR has provided our assessment of the changes currently being experienced within retail nodes.

- Diverse Dining Options: Food and beverage outlets, including cafes, casual dining, and fine dining restaurants, have become anchor tenants on main streets and are important components of retail centres. The demand for unique culinary experiences and the growing trend of social dining have driven an increase in both traditional restaurants and innovative food concepts like food halls and pop-up eateries.

- Specialty Food Shops: There is also growth in specialty food retailers, such as gourmet grocers, bakeries, and delicatessens, especially those that focus on locally sourced or artisanal products. These shops cater to the increasing consumer preference for quality, locally produced goods.

- Convenience and Necessity Retailers: Convenience stores, pharmacies, and other necessity-based retailers remain important tenants, as they provide essential goods and services. The demand for convenience has increased, particularly in urban areas where residents prefer to shop locally for everyday needs.

- Fitness and Wellness Centres: With increasing awareness of health and wellness, there is a growing number of gyms, yoga studios, pilates centres, and wellness clinics (like acupuncture and massage therapy) on main streets. These businesses provide services that are not easily replaced by e-commerce, making them resilient tenants.

- Health-Oriented Stores: Retailers specializing in health foods, organic products, supplements, and wellness-related goods are becoming more prominent, catering to the growing consumer interest in health and well-being.

- Personal Services: There is growth in businesses offering personal services, such as hair salons, nail salons, dry cleaners, and tailor shops, which cater to daily needs and are less affected by the shift to online shopping.

- Entertainment & Recreation: In keeping with the experiential retail trends, entertainment & recreation concepts such as VR, bowling alleys, mini-golf, arcades, game cafes, escape rooms and interactive museums and exhibits are locating on many mains streets. Many of the larger concepts are found in mixed-use developments which have the size and building configuration suitable for such uses.

- Artisanal Uses: The resurgence of maker markets and handcrafted goods has blurred the lines of retail and production. Many tenants now require spaces with two functions, studio and gallery, restaurant and brewery, woodshop and storefront. In many municipalities these types of uses are constrained by zoning policies that prohibit production in retail spaces.

- Technology Driven Retail: Recent technological innovations have created new methods to provide both convenience and destination retail. These innovations mitigate operating costs and seasonal demand.

PizzaForno, University of Calgary

4.5 Meanwhile Uses

There is a broad array of temporary uses commonly referred to as ‘Meanwhile’ Uses. A Meanwhile Use describes a situation where a site is utilised for a duration of time before it is turned into a more permanent end state, taking advantage of a short window of opportunity. These uses can bring community benefits, economic activity, and vibrancy to otherwise empty spaces. Meanwhile Use interventions are tactical and slot into wider strategies of planned change. They can help in shaping positive urban transformation (ARUP, Meanwhile Use London, 2020).

Meanwhile Uses can occupy existing buildings, particularly heritage buildings, and provide transitional urbanism that foreshadows the sustainable urban project that will succeed the temporary experience. In the Bragg Creek context, the County along with its partners, has the opportunity to dictate the value or mission statement of the overall neighbourhood activations and

The rise of temporary urban projects in cities over the past decade is a well documented phenomenon and has increasingly gained visibility in the public discourse and in urban policy circles. Commentators in architecture, urban policy and the arts have used terms such as ‘pop-up’, ‘temporary’, ‘interim’ and ‘meanwhile to capture innovative forms of short-term use of urban spaces. From theatres to community spaces and homes, temporary urban practices have opened the temporary form to the operations of a variety of urban actors, from public institutions to private and third-sector organisations. New and established urban practitioners contributed to the emergence of small-scale projects such as short-term retail outlets, ephemeral art galleries and temporary community gardens, which have rapidly informed, as practices and policies, a ‘new vernacular’ of urban cultures in Europe and North America.

**The Permanence of Temporary Urbanism (Ferreri, 2021) tenancies. In this instance, meanwhile uses would be specifically tied to the future of Bragg Creek.

An example of a successful Meanwhile Use in urban and rural areas are Pump Tracks. Pump Tracks are bike tracks that can be temporary or permanent uses in vacant lots. There are hundreds of examples of Pump Tracks around the world including four in Calgary as well as one in Okotoks, Airdrie, and High River.


Pump Track, South Glenmore, Calgary

4.6 Pop-ups

Pop-up shops, which are temporary uses that take over vacant commercial space, are the most common type of Meanwhile Use. However, there is also the opportunity to have seasonal pop-ups to activate empty spaces and to generate interest in an area. The City of Calgary has recently made it easier to obtain short-term spaces, which include artist studios, retail uses, and events to promote new pop-ups and interim businesses. The City of Calgary has established a list of permitted pop-ups which include an extensive range of businesses and then the associated land use designation that permits each pop-up.

Easy Days Pop-up/ The Mom Market Pop-up (Calgary, AB)

East Village is a 50 acre neighbourhood located between Fort Calgary and the downtown core. In 2007, the Calgary Municipal Land Corporation initiated a $400 million revitalization of East Village, transforming vacant lots and neglected buildings. Riverwalk Plaza in the East Village hosts various events including the Easy Days Pop-up and the Mom Market Pop-up on various weekends in the spring and summer.

Western Market (Muskegon, Michigan)

The City of Muskegon launched the program in 2017 with 12 chalets on an empty lot waiting for development. In 2018, based on its success, 5 more chalets were added. The chalets are wooden buildings between 90-150 square feet and cost $5,000 - $6,000 (USD) to build. Seasonal rentals range from $1,325 to $2,125

(USD). Potential tenants have to apply every season for the next upcoming season. The chalets are meant for small businesses to test the market. To date, several chalet tenants have gone on to rent permanent space in the downtown.

Western Market, Muskegon, Michigan

4.7 Retail Trends Summary

Bragg Creek is already capitalizing on many of these trends with the presence of local restaurants, art galleries, maker spaces, and hand crafted goods. This should be further encouraged through flexible zoning policies and building standards. Some of the trends such as pop-up markets and technology driven ground floors may be solutions for Bragg Creek where demand for goods and services is often seasonal.

5 Supply Analysis

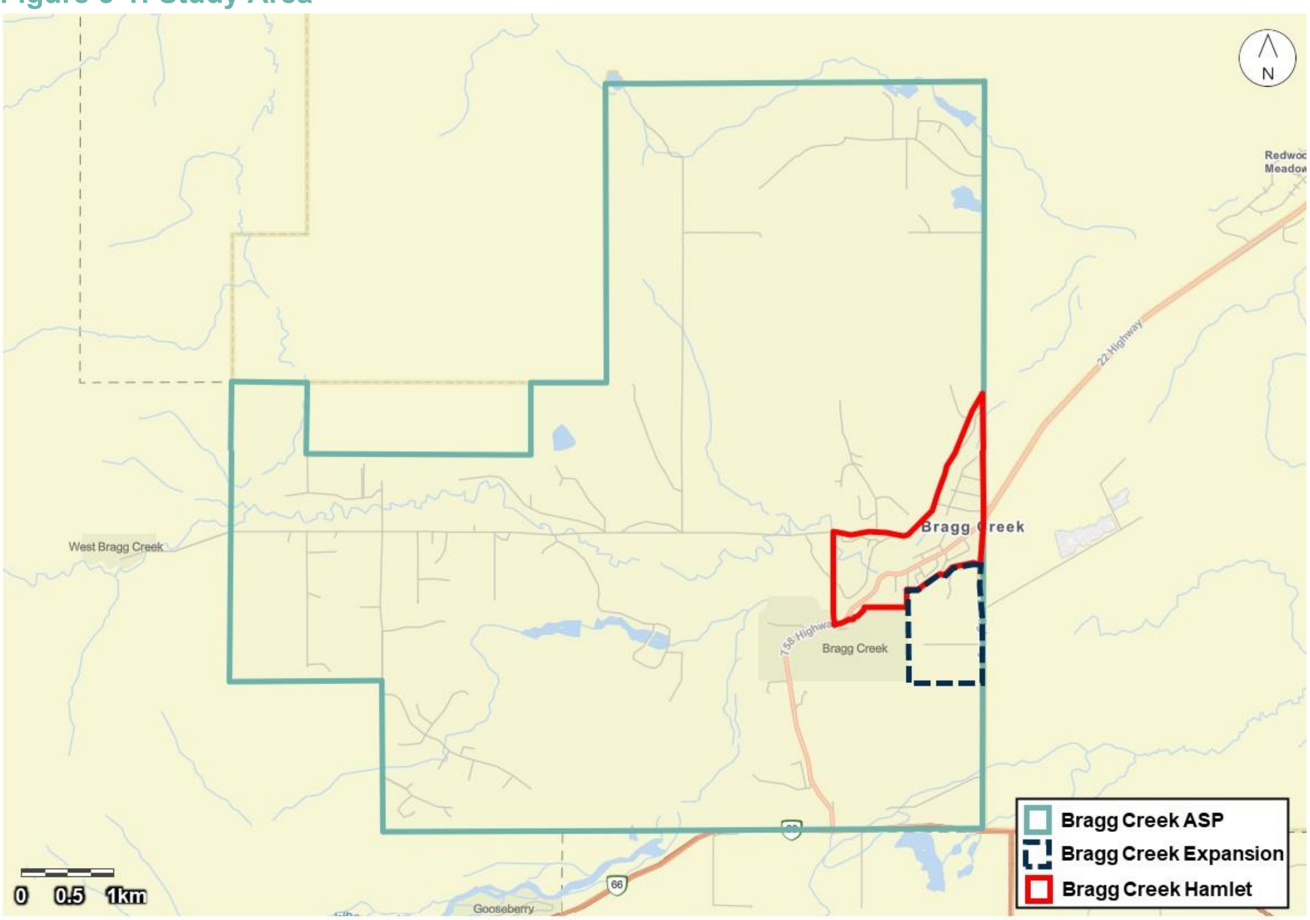
The following section of the report examines the supply dynamics of Bragg Creek.

5.1 Study Area Delineation

When conducting a market demand analysis for a specific retailer or development it is common to use a Trade Area approach. A retail Trade Area is defined as the geographic area from which the majority of sales originate from. Typically, a Trade Area accounts for 70 to 80 percent of a retailer's sales.

Given its rural context and wide customer draw as a tourist destination, delineating a Study Area is more appropriate than a typical Trade Area for a macro level examination of demand and resulting recommendations.

Figure 5-1: Study Area



Source: Tate Research; Basemap: ESRI ArcGIS.

While we recognize that the mandate of this study is to identify the future commercial needs based on the growth within the Expansion Lands, the population within the Hamlet and the larger ASP will continue to contribute to this demand. For the purpose of this report, TR has utilized the Bragg Creek ASP as the Study Area for forecasting market demand. This section of the report summarizes the research and analysis that was conducted as input into this Study Area.

5.2 Commercial Inventory

In February of 2025, TR staff conducted an in-person, on the ground inventory of all retail service, and vacant space in the Bragg Creek Hamet. Retail commercial space in the Bragg Creek ASP is concentrated within the Hamlet of Bragg Creek. The inventory of retail commercial space is summarized in Figure 5-2 on the following page. The following observations are made with respect to the Bragg Creek Hamlet inventory:

- Overall, there is approximately 122,000 square feet of retail commercial space in the Hamlet;
- The majority (53.3% or 65,000 square feet) of retail commercial space in Bragg Creek Hamlet is occupied by service tenants. The largest service categories are Food Services & Drinking Places and Other Services. Other Services includes a variety of business types such as Canada Post, veterinary hospitals and professional services;
- The second largest category is Non-Food & Beverage Retail which represents approximately 37,700 square feet, or 30.9% of retail commercial space in Study Area. This includes a variety of artisan shops such as Suncatchers Design Studio, Archers Antiques, The Painted Moose, Santosha Poetry, Hooked on Bragg, and One of a Kind;
- There is approximately 16,600 square feet of Food & Beverage Retail space in Study Area. This includes the 7,000 square foot Bragg Creek Foods, as well as a number of specialty food stores;
- The vacancy rate in Bragg Creek is 2.0%, which is well below a balanced range of 5.0% - 7.5%;
- The majority of retail commercial space in Bragg Creek Hamlet is locally serving. Despite this, many tenants serve a tourism function, such as restaurants and bars, bike rentals, and art studios;

- The majority of retail commercial space in the Bragg Creek Hamlet is located within the Hamlet Core with a limited amount of space located in Hamlet Heritage Mile; and,
- The average store size in the Bragg Creek Hamlet is 1,800 square feet. This smaller store size is supportive of small businesses which represent 91% of all stores in the Hamlet.

Figure 5-2: Bragg Creek Hamlet Inventory of Retail Commercial Space

122 *Thousand Square Feet of Retail Commercial Space in the Bragg Creek Hamlet*

2% *Vacancy Rate*

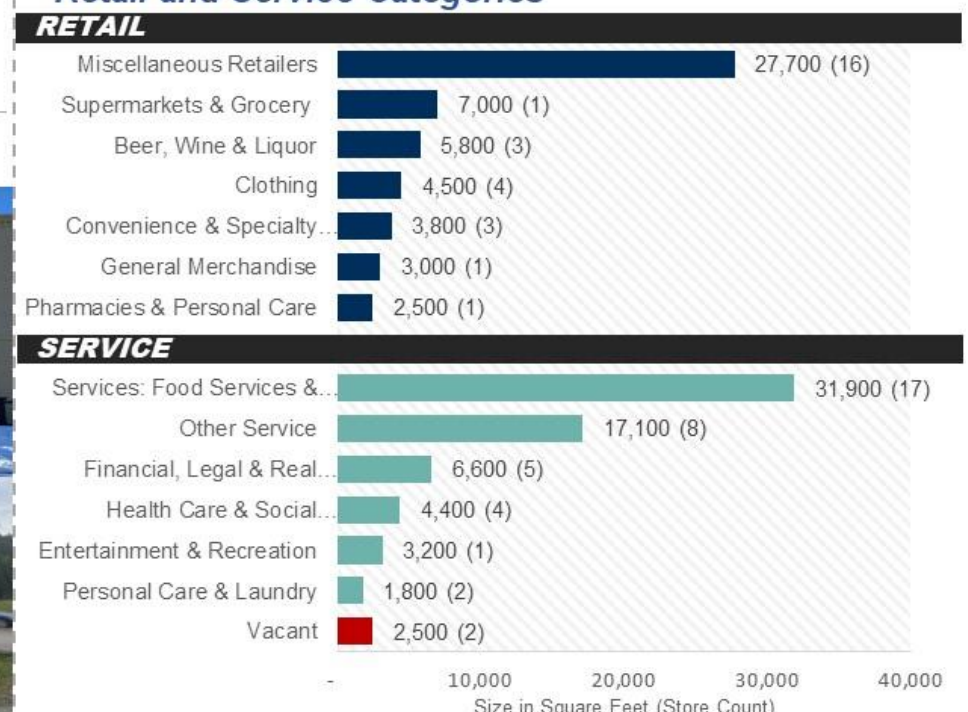
91% *Independent Business*

9% *Chain Business*

Store Size

Store Function

Retail and Service Categories



Spatial Distribution

Hamlet Core | 106,100 sq.ft.

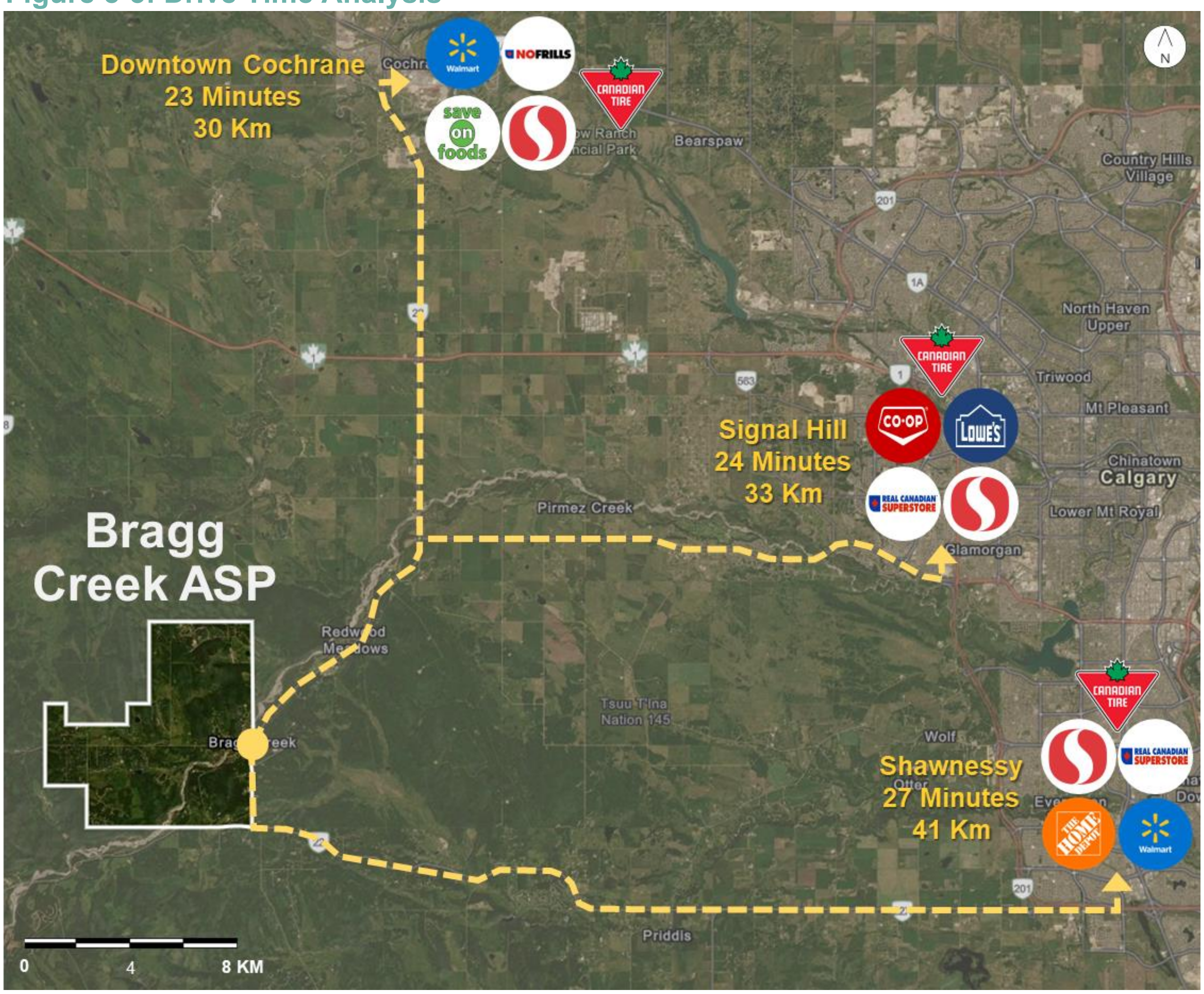
Hamlet Heritage Mile | 15,700 sq.ft.

Source: Tate Research based on in-person inventory conducted in February 2025.

5.3 Drive Time Analysis

The existing 122,000 square feet of retail commercial space in the Bragg Creek Hamlet includes a wide range of tenant types. As such, residents of the Bragg Creek Hamlet and larger ASP have the ability to fulfill their day-to-day shopping needs within the community. However, as a rural community occupied by small scale retail and service tenants, Bragg Creek residents fulfill the majority of their weekly shopping needs outside of the Bragg Creek Hamlet. Figure 5-3 indicates approximate drive times from the Bragg Creek Hamlet to major shopping destinations in the surrounding area. These shopping nodes are within a 30 minute drive of the Bragg Creek Hamlet, which is considered a reasonable distance for rural residents. These types of shopping nodes are driven by market forces and will not locate in rural areas.

Figure 5-3: Drive Time Analysis



Source: Tate Research; Basemap: ESRI ArcGIS.

5.4 Commercial Land Inventory

The Bragg Creek Hamlet includes 34 property parcels, both occupied and vacant, that are zoned for commercial uses. These parcels are either zoned Commercial Local Urban District or Direct Control Districts. Both these Land Use Districts permit retail commercial uses. TR has excluded lands zoned Business Recreational District in this commentary, as these areas are occupied by entertainment / recreational uses that do not serve the retail and service needs of residents, such as a golf course.

In total, there is 39.5 acres of zoned commercial land in the Study Area. There are eight vacant parcels which represent 13.0 acres of commercial land, or 33% of all zoned commercial land. In addition, there are two commercial parcels that are occupied by residential uses, which represent 1.5 acres of land.

5.5 Proposed Retail Commercial Space

There are three developments proposed in the Bragg Creek Hamlet that include a retail commercial component. These are Bragg Creek Distillers, The Laskin, and Gateway Village, which are indicated in Figure 5-4, below. They are located on lands designated Commercial Local Urban District and Direct Control District.

Figure 5-4: Proposed Retail Commercial Space

Source: Tate Research; Basemap: ESRI ArcGIS.

Bragg Creek Distillers – Bragg Creek

Bragg Creek Distillers is proposing a 12,000 square foot facility including a distillation and manufacturing room, malting plant and barrel-aging room, tasting room, and gift shop.

Retail: 12,000 square feet

The Laskin – Bragg Creek

The Laskin is proposed to include a restaurant, craft brewery, coffee roastery, spa and a country inn. The Laskin is proposed to include 21 hotel rooms.

Retail: 11,000 square feet

Gateway Village – Bragg Creek

Gateway Village is a proposed master planned mixed-use development. It is planned to include a residential, hospitality and commercial village. Overall, it will include 26,000 square feet of retail commercial space, 120 hotel rooms, and 140 residential units.

Retail: 26,000 square feet

5.6 Supply Analysis Summary

The Bragg Creek Hamlet includes approximately 122,000 square feet of retail commercial space, comprising a range of retail and service tenants that serve local residents, as well as visitors. However, many Bragg Creek Hamlet and ASP residents conduct their weekly shopping needs at major retail nodes in Calgary and Cochrane. There are three retail commercial developments proposed in the Bragg Creek Hamlet which have the potential to introduce a combined total nearly 50,000 square feet of new retail commercial space.

6 Demand Generators

The demand for commercial space is generated from a variety of sources including the local Bragg Creek Hamlet and larger ASP population, surrounding residents and employment, pass-by traffic, and tourism. The following section of the report examines the components of demand that will support commercial space within the Bragg Creek Hamlet and Expansion Lands.

6.1 Study Years and Limitations

The main determinant of retail commercial demand is population growth. In order to forecast retail commercial demand a horizon year has been established. For the purpose of this analysis, we have used 2051 as the horizon year. A period of 30 years is considered appropriate for a planning exercise. It should be noted that retail trends are constantly evolving and the market demand analysis should be revisited periodically to assess the appropriateness of the recommendations.

6.2 Population Scenarios

As discussed in this report, the Bragg Creek ASP is being updated to explore potential land use scenarios for the hamlet expansion area in accordance with the Bragg Creek ASP and the Bragg Creek Revitalization Plan.

Figure 6-1, which follows, indicates the population forecast for the components of the Bragg Creek Study Area. The projections are based on various inputs including information from the County and Hamlet projections from the Residential Feasibility Study conducted by Zonda Urban.

This forecast includes a low and high population scenario with the difference being the amount of growth that is feasible within the Hamlet Expansion Lands. Both scenarios assumed the same growth rate for the balance of the ASP. It is our understanding, based on conversations with the County that the high scenario is achievable, however, in order to provide a conservative forecast, TR has also included the Low Scenario.

Figure 6-1: Population Scenarios

Low Scenario

	2024 [1]	2031	2041	2051
Bragg Creek (Hamlet + Expansion Lands) [2]	420	820	950	1,105
Periodic Growth		400	130	155
Annual Growth (#)		57	13	16
Annual Growth (%)		13.6%	1.6%	1.6%
Bragg Creek ASP (less Hamlet + Expansion Lands) [3]	945	1,050	1,225	1,430
Periodic Growth		105	175	205
Annual Growth (#)		15	18	21
Annual Growth (%)		1.6%	1.7%	1.7%
Total ASP	**1,365**	**1,870**	**2,175**	**2,535**
Periodic Growth		505	305	360
Annual Growth (#)		72	31	36
Annual Growth (%)		5.3%	1.6%	1.7%

High Scenario

	2024 [1]	2031	2041	2051
Bragg Creek (Hamlet + Expansion Lands) [2]	420	910	1,360	2,035
Periodic Growth		490	450	675
Annual Growth (#)		70	45	68
Annual Growth (%)		16.7%	4.9%	5.0%
Bragg Creek ASP (less Hamlet + Expansion Lands) [3]	945	1,050	1,225	1,430
Periodic Growth		105	175	205
Annual Growth (#)		15	18	21
Annual Growth (%)		1.6%	1.7%	1.7%
Total ASP	**1,365**	**1,960**	**2,585**	**3,465**
Periodic Growth		595	625	880
Annual Growth (#)		85	63	88
Annual Growth (%)		6.2%	3.2%	3.4%

Source: Tate Research.

1) Based on Environics Analytics.

2) From Rocky View County – Residential Feasibility Study. High growth scenario assumes population growth from 2024 at 4.1%. Low growth assumes 1.5%. Both scenarios include Gateway Village (140 units) and proposed retirement residence (20 units).

3) Based on an anticipated future growth rate of 1.5% per annum as per Rocky View County data.

* Populations are rounded to the nearest 5.

Impact on Bragg Creek: The two population scenarios provide different outcomes. In the 2051 horizon year, the population of the High Scenario is 37% higher than the Low Scenario.

6.3 Demographic Profile

The following section examines the socio-economic characteristics of the Bragg Creek ASP using various sources including Statistics Canada and Environics Analytics. Spending and shopping patterns are influenced by socio-economic characteristics that are both complex and interrelated. It is the opinion of TR that using the entire ASP is appropriate as the ASP population (excluding the Hamlet and future Expansion Lands) represents a significant portion of the population.

TR has developed key demographic consumer profiles for Bragg Creek ASP residents using Environics Analytics Prizm5 segmentation tool. Prizm5 classifies Canada's neighbourhoods into 67 unique lifestyle types by integrating geographic, demographic, and psychographic data. This tool creates a comprehensive picture of residents and customers according to their shared demographic, lifestyle, and behavioural traits. Prizm5 segments are ranked from 1 to 67 based on household income and spending habits.

Nearly 85% of Bragg Creek ASP residents fall within three Prizm5 segments: New Country (51% of residents), Agri-Biz (17%), and Kick-Back Country (16%).[1] A summary of these profiles is provided below:

- New Country: Ranked 33 of 67, this segment is found mostly in Alberta and Ontario, New Country is one of the wealthiest rural segments, with nearly two-thirds of residents working in well-paying agricultural and blue-collar occupations. More than 40 percent of households have children, typically of all ages. Most own comfortable, single-family homes, and often fill their driveways with power boats, ATVs and snowmobiles. Their daily routine is not unlike the one their grandparents enjoyed. For leisure, New Country members like to go hunting, fishing and camping, or they'll stay home and do gardening or crafts. Known for their deep roots in the community, three-quarters of residents are third-plus-generation Canadians; fewer than one in ten is foreign born.

[1] The same three Prizm5 profiles also apply to the Hamlet.

- Agri-Biz: Ranked 48 of 67, this segment is primarily scattered across the Prairies and a few farming communities in Ontario and British Columbia, Agri-Biz is one of Canada's most rustic lifestyles. No other segment has a higher proportion of farmers—nearly one-fifth its labour force—and few of them have other home-based businesses. Nearly 60 percent of maintainers are between 45 and 75, and most adults have high school or

Figure 6-2: Consumer Profiles

New Country	Agri-Biz	Kick-Back Country
R1 UPPER-MIDDLE RURAL	R2 LOWER-MIDDLE RURAL	R1 UPPER-MIDDLE RURAL
F3 MIDDLE-AGE FAMILIES	F3 MIDDLE-AGE FAMILIES	F3 MIDDLE-AGE FAMILIES
Population: 615,495 (1.61% of Canada)	**Population:** 382,695 (1.00% of Canada)	**Population:** 553,854 (1.45% of Canada)
Households: 218,590 (1.45% of Canada)	**Households:** 136,698 (0.91% of Canada)	**Households:** 192,103 (1.28% of Canada)
Average Household Income $104,556	**Average Household Income** $92,796	**Average Household Income** $149,823
Average Household Net Worth: $608,210	**Average Household Net Worth:** $507,028	**Average Household Net Worth:** $964,293
House Tenure: Own	**House Tenure:** Own	**House Tenure:** Own
Education: Mixed	**Education:** Grade 9/High School/ Trade School	**Education:** Mixed
Occupation: Primary/Blue Collar	**Occupation:** Primary/Blue Collar	**Occupation:** Blue Collar
Cultural Diversity Index: Low	**Cultural Diversity Index:** Low	**Cultural Diversity Index:** Low
Sample Social Value: *Community Involvement*	**Sample Social Value:** *Skepticism Towards Advertising*	**Sample Social Value:** *Effort Toward Health*

Source: Tate Research

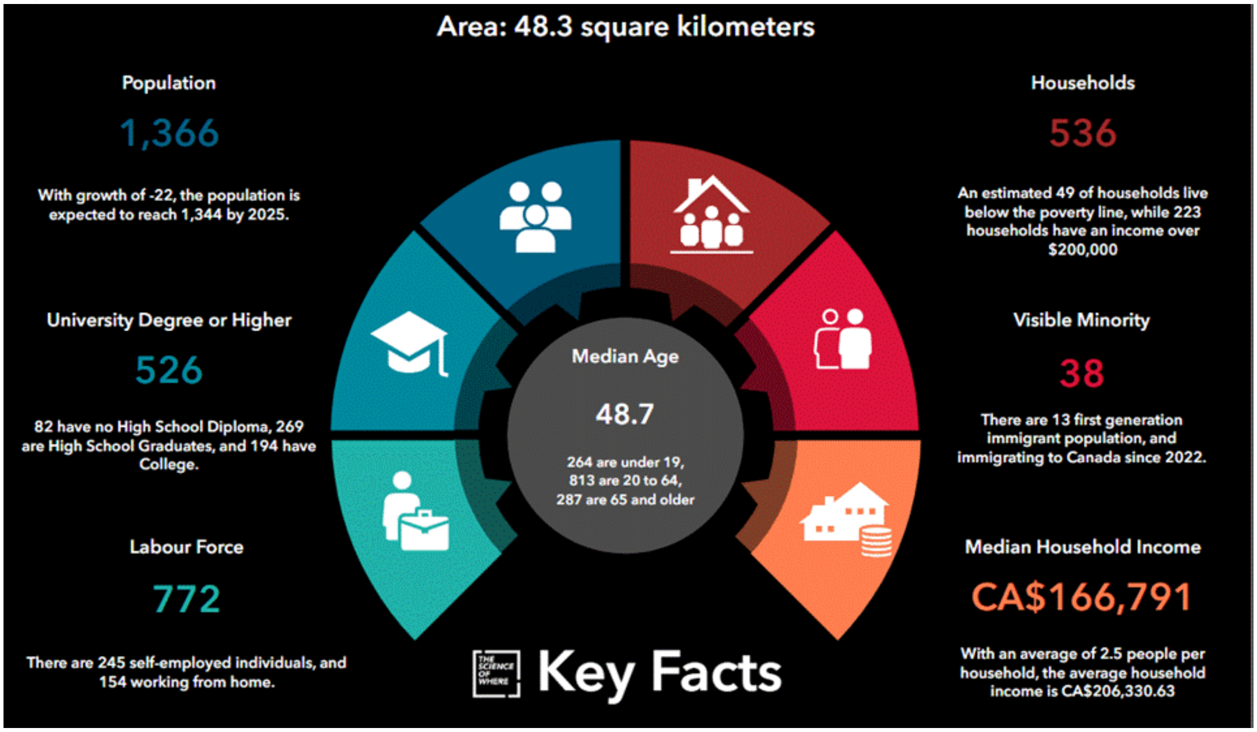
trade school educations. Thanks to dual wage-earners among these couples and families, households earn middle incomes and own single-detached houses. Much like other rural segments, residents enjoy traditional country pursuits like baking, sewing and crafting, as well as fishing, hunting and boating.

- Kick-Back Country: Ranked 14 of 67, this is the wealthiest rural lifestyle, Kick-Back Country consists of middle-aged families and older couples living in rustic areas near large and medium-size cities. The maintainers tend to be between 55 to 64 years old, their children age 10+. Despite mixed educations, they earn impressive incomes from jobs in mining, construction, trades and transportation. Almost 90 percent of households own a home, typically a spacious, single-detached house. Here, beyond the urban sprawl, driveways often contain compact SUVs and large pickups for commuting to work, hauling boats and campers, and travelling to the city for shopping.

Figure 6-3, on the following page, summarizes key demographic characteristics for the Bragg Creek ASP. Generally, it indicates that residents of the Bragg Creek ASP are older, educated, high earning individuals. However, from the perspective of demographic trends, the median household income has been increasing at the same rate as the Province. This indicates that the Bragg Creek ASP is not necessarily becoming wealthier. It is also important to note that there is a large income disparity in the Bragg Creek ASP. Approximately 42% of households earn less than the Provincial average ($134,000), meanwhile approximately 42% of households earn over $200,000 per year. This can result in diverging retail and service needs.

Impact on Bragg Creek: While the Bragg Creek ASP has a high average income, a significant portion of households maintain a rural lifestyle. Their interests are in outdoor activities and spending is not driven by discretionary shopping. However, there is also a segment of the population with very different interests. The wealthy suburban segment prioritizes food and beverage, health and wellness, and experiential retail.

Figure 6-3: Demographic Characteristics



Source: Tate Research; Environics Analytics.

6.4 Traffic Volume

Pass-by traffic from residents, workers, and visitors can generate demand for commercial space. From an automobile perspective, the Bragg Creek Hamlet is well connected to the surrounding area via Highway 22 which runs along the eastern border of the Bragg Creek ASP.

TR has examined highway traffic volume in the vicinity of Bragg Creek. Highway 22, south and east of the main road in Bragg Creek (White Avenue), had an average of approximately 4,900 vehicles per day in 2014 and 4,650 vehicles per day in 2023. Comparing these highway traffic volumes to those of Highway 22 at the intersections of both the Trans-Canada Highway and Highway 1A, these points have averaged approximately 16,250 and 13,000 vehicles per day, respectively, in 2014 then averaging 18,600 and 16,950 vehicles per day, respectively, in 2023. This data indicates not only that Highway 22 receives higher traffic volumes north of Bragg Creek at these intersections, but also that these intersections have increased traffic volumes over the past decade while Highway 22 at Bragg Creek has decreased in traffic volume.

It should be noted that the main trail head parking is located approximately 3 km south west of the main commercial core in Bragg Creek. Furthermore, it is possible to access the trail head parking without entering the main commercial core.

Impact on Bragg Creek: Given the low level of pass-by traffic, it is unlikely that a significant amount of commercial demand will be supported by pass-by traffic.

6.5 Tourism

Bragg Creek is a tourist destination that attracts visitors from throughout Alberta and beyond. It is known for its outdoor recreational opportunities; it is a trailhead community with the TransCanada Trail passing directly through it and is a gateway to Kananaskis Country. Tourism provides critical support to the unique retail and service businesses in the Hamlet.

At a Provincial level, tourism generated $12.7 billion in expenditures from 37.7 million visits in 2023[2]. The majority of expenditures (77%) and visits (94%) originate from within Canada. These numbers surpass pre-pandemic levels and set a new record for annual expenditure and visitation.

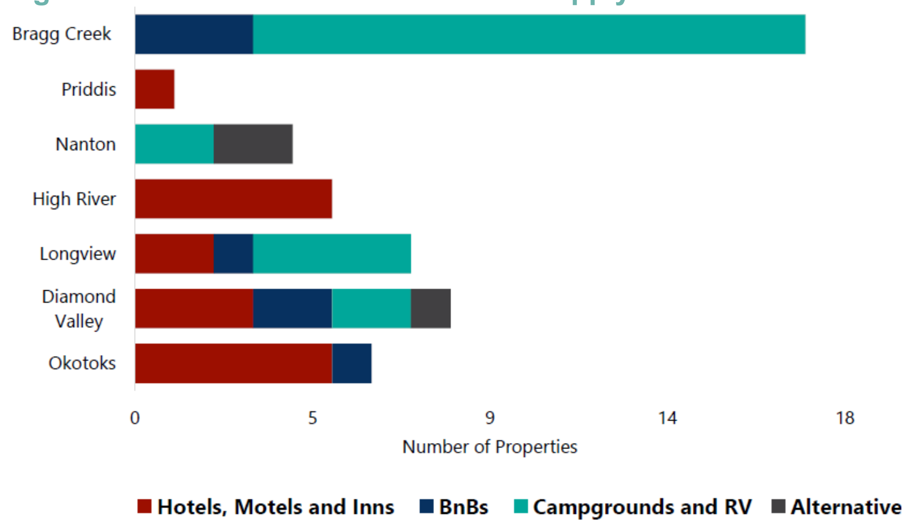
Bragg Creek is one of the key communities located in the Foothills Tourism Development Zone. The Foothills Tourism Development Zone Discovery Report (2023) ("Foothills TDZ Report") outlines strategies to prioritize and increase tourism in Bragg Creek and its surrounding area. The following points summarize important findings from the Foothills TDZ Report:

Accommodation Mix

- The need to prioritize hotel development in the upper-upscale category is critical to meet the expectations of visitors. Figure 6-4, below, indicates the accommodation supply in the Foothills;
- Some of the new accommodation developments that are in the development process that can meet these expectations include: The Laskin and Gateway Village, both of which are in Bragg Creek.

[2] Travel Alberta Tourism Indicators https://industry.travelalberta.com/research/tourism-indicators

Figure 6-4: Foothills Accommodation Supply



Source: Tate Research; Foothills Tourism Development Zone Discovery Report 2023, pg 20.

Focus Areas

- Bragg Creek offers a lot to tourists, however, in order to balance tourism growth, the Foothills TDZ Report recommends that Bragg Creek focus on:
    - “hiking, cross-country skiing, natural sites, overall soft adventure, and accommodations”.

Impact on Bragg Creek: Tourism expenditures support retail and service tenants that otherwise may not exist in Bragg Creek. The seasonality of Bragg Creek makes it challenging to maintain demand from tourism year round and the lack of overnight accommodation may also limit opportunity.

6.6 Demand Generators Summary

Demand for commercial space within the Bragg Creek Hamlet and Expansion Lands will be primarily generated by population growth and tourism, and to a lesser extent, pass-by traffic. There is population growth forecast within the Bragg Creek ASP and the tourism industry remains consistent and could potentially increase given the current geo political climate. These factors will provide support for commercial space in the Bragg Creek Hamlet and Expansion Lands.

7 Market Demand Analysis

This section of the report presents the market demand analysis for the Bragg Creek Hamlet and Expansion Lands.

7.1 Market Demand Analysis Methodology

TR used an expenditure and per capita based market demand analysis to quantify the demand for retail and service space within the Bragg Creek Hamlet and Expansion Lands. The following graphic summarizes the methodology used for the market demand analysis and the conclusions are presented in Section 7.3. A more detailed explanation of the methodology is provided in Appendix A.

Market Demand Analysis

TR conducted a market demand analysis to provide a guideline of how much space could be supported within the Bragg Creek ASP. The Market Demand Analysis estimates the total demand generated by residents and visitors and the outflow of dollars to other markets. It indicates the amount of retail and service space warranted in the Bragg Creek ASP over the forecast period.

Forecast Population

Forecast population growth in the Study Area over the planning horizon.

Adjusted Per Capita Expenditure

Calculating Study Area per capita expenditures by adjusting the average per capita spending for the Province to account for the demographics of Study Area residents and e-commerce.

Estimate Inflow and Outflow

$ $

Estimate inflow and outflow of expenditures based on drive times, mobility data, professional experience, and other factors.

Convert Expenditure Potential to Square Feet

SF

Determine warranted demand by converting Study Area expenditure potential into square feet using appropriate sales per square foot levels.

Service Space Required Per Capita

Calculate demand for service space by applying appropriate space per capita to population growth.

Retail and Service Categories

Food & Beverage Retail	Non-Food & Beverage Retail	Services
Supermarkets	Pharmacy & Personal Care	Eating & Drinking
Convenience & Specialty Food	Other Non-Food & Beverage Retail	Personal
Beer, Wine and Liquor		Financial, Real Estate, Legal
		Medical, Dental, Health
		Entertainment & Recreation
		Other Services

7.2 Mobility Data Analysis

TR has utilized mobility location data to quantify the customer draw of existing retail commercial space in the Bragg Creek Hamlet. The mobility location data is anonymized, permission-based data collected from location enabled mobile devices. Using this data, TR can examine a sample of shoppers for a particular location and identify where they live and work. This data was collected for the Bragg Creek Shopping Centre from February 23, 2024 to February 23, 2025. Figure 7-1 summarizes the results of the mobility data analysis and Figure 7-2 illustrates the customer draw of Bragg Creek.

Figure 7-1: Bragg Creek Visitor Patterns Summary

	Capture Percent		Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	
Calgary	44%		16%	12%	9%	8%	12%	22%	20%	100%
Rocky View County	19%		8%	17%	20%	13%	13%	20%	8%	100%
Foothills County	15%		13%	16%	17%	16%	17%	15%	5%	100%
Tsuu T'ina Nation	6%		11%	11%	8%	17%	27%	18%	8%	100%
Cochrane	3%		19%	8%	21%	12%	19%	8%	13%	100%
Okotoks	2%		23%	11%	4%	5%	28%	12%	18%	100%
Airdrie	2%		1%	3%	16%	6%	7%	45%	22%	100%
Edmonton	1%		6%	7%	11%	5%	19%	38%	13%	100%
Red Deer	1%		11%	1%	14%	0%	42%	7%	26%	100%
All Other	9%									
Total	**100%**	**Average**	**12%**	**10%**	**13%**	**9%**	**20%**	**21%**	**15%**	**100%**

Source: Tate Research; Azira Mobility Data from February 2024 to February 2025.

The following observations are made with respect to Figure 7-1 and 7-2:

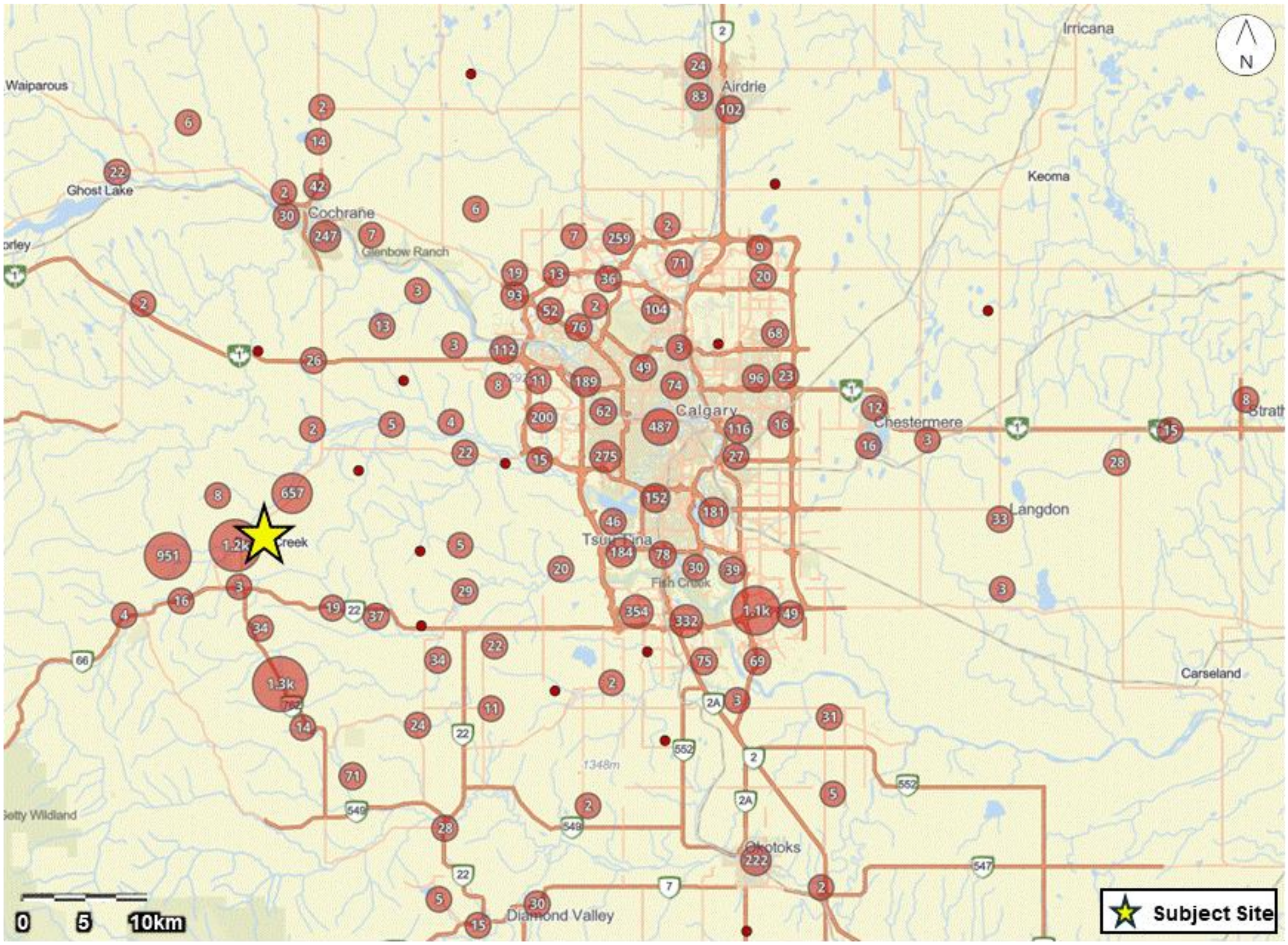
- Overall, approximately 19% of Bragg Creek Shopping Centre customers originate from within Rocky View County. This indicates that existing retail commercial space in the Bragg Creek Hamlet may have a low capture rate and relies on inflow from other areas.

- The City of Calgary represents the largest concentration of customers. Approximately 44% of Bragg Creek Shopping Centre customers come from Calgary. The function of the Bragg Creek Hamlet as a regional tourist destination is reinforced by the cellphone data, which indicates that approximately 95% of customers come from within the Province of Alberta.

- The highest percentage of visitors come to Bragg Creek on Friday (20%), Saturday (21%), and Sunday (15%);

- The fewest percentage of visitors come to Bragg Creek on Thursday (9%); and,
- The highest percentage of visitors come from Calgary (44%), Rocky View County (19%), and Foothills County (15%).

Figure 7-2: Bragg Creek Shopping Centre Mobility Data



Source: Tate Research; Basemap: ESRI ArcGIS. Azira Mobility data from February 2024 to February 2025.

This data has been integrated into the market demand analysis by providing insight into capture rates and inflow for the Bragg Creek Hamlet and Expansion Lands.

7.3 Market Demand Analysis Results

Figure 7-3, below, and 7-4, on the following page presents the results of the market demand analysis for the Low and High Scenarios, respectively. It indicates the warranted new space for each retail and service category to 2051. This represents the amount of retail and service space that could be supported within the Bragg Creek Hamlet and Expansion Lands over the forecast period, but not necessarily the amount of space that is recommended. The amount of recommended space is discussed in the following section of the report and takes into account other factors, such as population distribution, locational requirements for local and national stores, the priorities of Bragg Creek ASP residents, and a variety of other factors.

Overall, this analysis indicates that, in the Low Scenario, there is demand for an additional 21,300 square feet of retail commercial space by 2031, growing to 31,200 square feet by 2041, and further to 41,800 square feet by 2051.

If the High Scenario were to be achieved, there would be demand for approximately 68,900 square feet of retail commercial space by 2051.

Figure 7-3: Low Scenario Study Area Total Warranted New Space (Sq. Ft.) [1

	Low Scenario			
	2024	2031	2041	2051
Population [2)	1,365	1,870	2,175	2,535
Food & Beverage Retail				
Supermarkets		2,100	4,000	5,100
Convenience & Specialty Food		800	1,200	1,700
Beer, Wine and Liquor		1,000	1,700	2,300
Non-Food & Bevearge Retail				
All Non-Food & Beverage Retail		8,400	10,100	12,100
TOTAL RETAIL		**12,300**	**17,000**	**21,200**
Services				
Eating & Drinking		2,300	3,600	5,300
Personal		1,200	1,900	2,800
Financial, Real Estate, Legal		600	1,000	1,400
Medical, Dental, Health		1,500	2,300	3,400
Entertainment & Recreation		1,200	1,900	2,700
Other Services		2,200	3,500	5,000
TOTAL SERVICE		**9,000**	**14,200**	**20,600**
TOTAL RETAIL & SERVICE		**21,300**	**31,200**	**41,800**

Source: Tate Research

[1)] Based on an expenditure and per capita based market demand analysis conducted by TR.

[2)] Based on Figure 6-1.

Figure 7-4: High Scenario Study Area Total Warranted New Space (Sq. Ft.) (1

	High Scenario			
	2024	2031	2041	2051
Population [2)]	1,365	1,960	2,585	3,465
Food & Beverage Retail				
Supermarkets		2,500	5,700	8,800
Convenience & Specialty Food		800	1,700	3,000
Beer, Wine and Liquor		1,000	2,400	4,000
Non-Food & Bevearge Retail				
All Non-Food & Beverage Retail		9,900	17,100	16,200
TOTAL RETAIL		**14,200**	**26,900**	**32,000**
Services				
Eating & Drinking		2,700	5,500	9,500
Personal		1,400	2,900	5,000
Financial, Real Estate, Legal		700	1,500	2,500
Medical, Dental, Health		1,700	3,500	6,100
Entertainment & Recreation		1,400	2,800	4,800
Other Services		2,600	5,200	9,000
TOTAL SERVICE		**10,500**	**21,400**	**36,900**
TOTAL RETAIL & SERVICE		**24,700**	**48,300**	**68,900**

Source: Tate Research
[1)] Based on an expenditure and per capita based market demand analysis conducted by TR.
[2)] Based on Figure 6-1.

It should be noted that for the purposes of this analysis the 'total' number is more relevant than the individual categories. Demand within individual categories will change along with retail trends and development concepts.

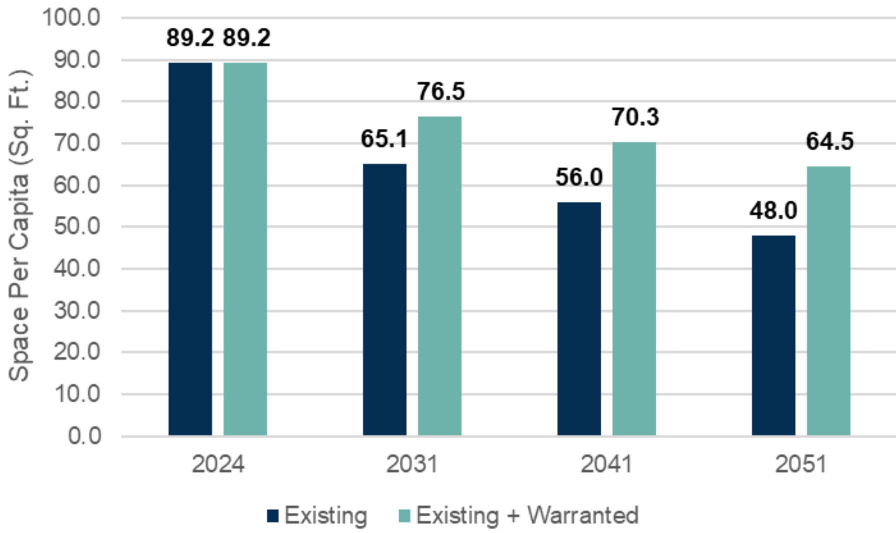
7.4 Service Level Assessment

The inventory in Section 5.2 indicates there is 121,800 square feet of retail commercial space in the Bragg Creek Hamlet. Based on the existing population of 1,365 persons, there is 89.2 square feet of retail commercial space per capita in the Bragg Creek ASP.

Low Population Scenario Assessment

Theoretically, if the existing amount of retail commercial space was maintained over the next 30 years the amount of retail commercial space per capita would decrease to 48.0 square feet. Alternatively, if the total amount of warranted new retail commercial space was built it would result in 163,600 square feet of retail commercial space in the Bragg Creek Hamlet and Expansion Lands. Accordingly, the amount of retail commercial space per capita would decrease from 89.2 square feet per capita in 2024 to 64.5 square feet per capita in 2051, which is

Figure 7-5: Study Area Retail Commercial Space Per Capita



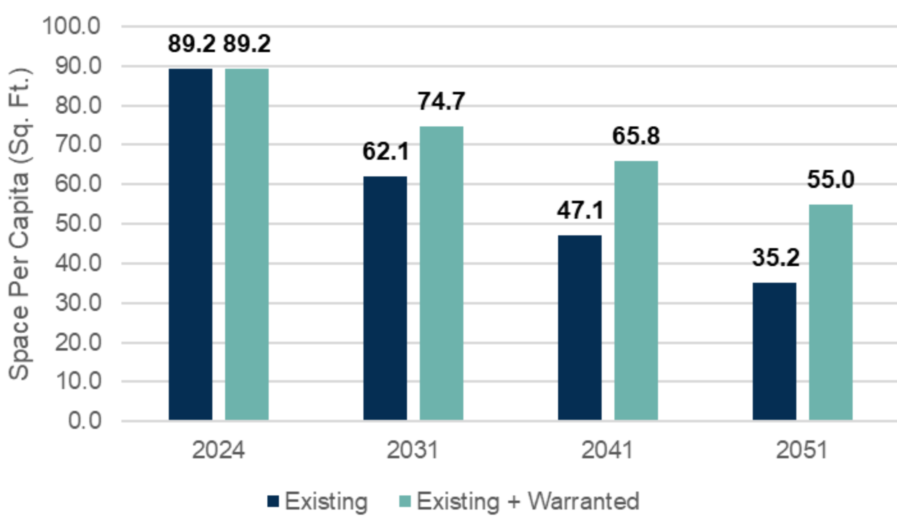
Source: Tate Research.

indicated in Figure 7-5.

High Population Scenario Assessment

Based on the existing population of 1,365 persons, the High Scenario indicates there is 89.2 square feet of retail commercial space per capita in the Bragg Creek ASP. Theoretically, if the existing amount of retail commercial space was

Figure 7-6: Study Area Retail Commercial Space Per Capita



Source: Tate Research.

maintained over the next 30 years the amount of retail commercial space per capita would decrease to 35.2 square feet. Alternatively, if the total amount of warranted new retail commercial space was built, it would result in 190,700 square feet of retail commercial space in the Bragg Creek Hamlet and Expansion Lands. Accordingly, the amount of retail commercial space per capita would decrease from 89.2 square feet per capita in 2024 to 55.0 square feet per capita in 2051, which is indicated in Figure 7-6.

In both of these scenarios, there will be a decline in the amount of retail commercial space per capita in the Bragg Creek ASP. This is expected, given trends occurring in the industry which are resulting in a decline in the amount of retail commercial space required per capita.

Typically, a ratio of 30 to 40 square feet of retail commercial space per capita is considered healthy and indicative of a well served market. The Calgary City Wide Retail and Commercial Study, conducted in 2016, indicates there is 31 square feet of retail commercial space per capita in Calgary. As such, the Bragg Creek ASP is currently over served by retail commercial space. This is likely a result of the tourism function of the Bragg Creek. Based on this assessment, the full amount of warranted retail commercial space is not required to adequately serve Bragg Creek ASP residents.

To better understand the needs and opportunities for retail commercial space in the Bragg Creek ASP, TR has provided recommendations that address resident and visitor needs separately.

7.5 Market Opportunity Assessment

The amount of warranted retail commercial space in Figure 7-3 and 7-4 is the total amount that can be supported in the Bragg Creek Hamlet and Expansion Lands. However, this does not always equate with what is required to adequately serve residents, as we saw in Section 7.4, or with market opportunity. The following points summarize our assessment of strategic opportunities in the Bragg Creek Hamlet and Expansion Lands for the Low and High Scenarios:

- Supermarket: There is insufficient demand to support a full size or national supermarket. There is demand (5,100 square feet in Low Scenario and 8,800 square feet in High Scenario) for a smaller grocery store, however, it would have to compete with the existing Bragg Creek Foods with a similar sized store which may prove challenging. An expansion of the existing Bragg Creek Foods may be warranted in the future.

- Convenience & Specialty Food: There is likely not enough demand to support a national convenience or specialty food tenant in this category. The warranted demand (1,700 square feet in Low Scenario and 3,000 square feet in High Scenario) is enough to support approximately two to three new operators to compliment the existing stores in the category (i.e. Frontier Candy, Mabel & Maries Modern Comfort Food, Whisky & Woodsmoke Mercantile).

- Beer, Wine & Liquor: The Bragg Creek ASP is currently served by three Beer, Wine & Liquor stores. The warranted demand (2,300 square feet in Low Scenario and 4,000 square feet in High Scenario) does not provide sufficient market opportunity for a new business to open in the market, given it would have to compete with the two existing stores. However, the expansion of one of the existing operators may be warranted.

- All Non-Food & Beverage Retail: The warranted demand (12,100 square feet in Low Scenario and 16,200 square feet in High Scenario) provides an opportunity for additional independent retailers to open in the Bragg Creek Hamlet and Expansion Lands. Specifically, there may be an opportunity for a clothing store, potentially within the high end or sports category which can focus on the tourism segment or a dollar store which will benefit local residents. Additionally, given the changing demographics of the Bragg Creek ASP and the proposed seniors housing, there may be an opportunity for a new pharmacy or an optician.

- Eating & Drinking: There is demand for an additional 5,300 square feet (Low Scenario) and 9,500 square feet (High Scenario) of restaurant space in the Bragg Creek Hamlet and Expansion Lands. Based on the average size of restaurants in the Bragg Creek (1,900 square feet) this would represent three to five additional businesses. In addition, there may be potential for a national or chain business, such as Tim Hortons.

- However, it is important to note that additional Eating & Drinking space is not required to serve existing residents. On a per capita basis, Bragg Creek is over served by the existing Eating & Drinking space. Overall, a quarter of all Bragg Creek Hamlet retail commercial space is composed of restaurants.

- Personal Services: There is sufficient demand to support a new store in the personal service category (2,800 square feet in Low Scenario and 5,000 square feet in High Scenario). Specifically, there may be an opportunity for a nail salon, which does not currently exist in the Bragg Creek ASP.

- Financial, Real Estate, Legal Services: There is insufficient demand to support a national bank (1,400 square feet in Low Scenario and 2,500 square feet in High Scenario). There is limited opportunity for other professional office space, such a legal office.

- Medical, Dental, Health: There is market opportunity to support a limited amount of new Medical, Dental, Health space in the Bragg Creek Hamlet and Expansion Lands (3,400 square feet in Low Scenario and 6,100 square feet in High Scenario). These types of uses would benefit local residents, especially given the proposed seniors housing units.

- Entertainment & Recreation: Fitness and recreation within the Bragg Creek is primarily focussed on outdoor activity. However, as the tourism market grows, there may be an opportunity for entertainment oriented uses (2,700 square feet in Low Scenario and 4,800 square feet in High Scenario), specifically within the proposed Gateway Village development.

- Other Services: There is demand for additional Other Service space in the Bragg Creek Hamlet and Expansion Lands (5,000 square feet in Low Scenario and 9,000 square feet in High Scenario). This type of space may not be required to locate within the Hamlet Core.

7.6 Potential Commercial Land Requirement

Overall, there is demand for 21,300 to 24,700 square feet of new retail commercial space in the Bragg Creek Hamlet and Expansion Lands by 2031. The proposed Gateway Village development will introduce approximately 26,000 square feet of new retail commercial space in Bragg Creek. As such, the retail component of Gateway Village will fulfill the warranted retail commercial demand for the next 10 years.

By 2041 there will be warranted demand to support additional retail commercial space beyond that proposed at Gateway Village in the Low Scenario. In 2041 there is demand for 31,200 square feet of retail commercial space, growing to 41,800 by 2051. Accounting for Gateway Village, there is residual demand for 15,800 square feet of retail commercial space in the Bragg Creek Hamlet and Expansion Lands by 2051. Using a standard coverage ratio of 25%, this equates to 1.5 acres of commercial land required in the Bragg Creek Hamlet and Expansion Lands. This development could be accommodated on vacant sites and the redevelopment or intensification of existing occupied sites. Currently, the Bragg Creek Hamlet has a coverage ratio of approximately 15% which is significantly lower than a standard ratio of 25%. This indicates an opportunity for intensification of existing commercial sites.

By 2041 there will be warranted demand to support additional retail commercial space beyond that proposed at Gateway Village in the High Scenario. In 2041 there is demand for 48,300 square feet of retail commercial space, growing to 68,900 by 2051. Accounting for Gateway Village, there is residual demand for 42,900 square feet of retail commercial space in the Bragg Creek Hamlet and Expansion Lands by 2051. Using a standard coverage ratio of 25%, this equates to 3.9 acres of commercial land required in the Bragg Creek Hamlet and Expansion Lands. This development could be accommodated on vacant sites and the redevelopment or intensification of existing occupied sites.

As discussed in Section 5.4 of this report, there is currently 13.0 acres of vacant commercial land in the Bragg Creek Hamlet. However, the majority of this land (82%) is on the proposed Gateway Village site. The only other significant parcel of vacant commercial land is a 2.1 acre site on White Avenue, which is proposed to be developed as a seniors residence. As such, there is no vacant commercial land available for development and new retail commercial space would have to be accommodated on existing occupied sites, or newly designated lands potentially within the Expansion Lands.

It is recommended that new retail commercial space be concentrated within the **Hamlet Core**. Clustering retail commercial space within the Hamlet Core will support its viability by creating synergies between businesses, enhancing its public realm and walkability and creating connections with the Elbow River. In addition, given the low level of pass-by traffic, it is unlikely that a significant amount of commercial demand will be supported by pass-by traffic. As such, there is not requirement for retail commercial space to be located on the highway. Figure 7-5, on the following page, indicates that existing and future land uses within the Hamlet Core and potential locations for new retail space.

Figure 7-5: Potential Future Retail Commercial Locations

Source: Tate Research; Basemap: ESRI ArcGIS.

Given the location of the proposed Gateway Village, The Laskin, and Bragg Creek Distillers, as well as the existing Bragg Creek Shopping Centre and the connection to the Elbow River, the ideal location for retail commercial development is on the north side of Balsam Avenue. This will capitalize on existing and proposed developments and create a concentration of activity within the Hamlet Core. In addition, concentrating retail space on Balsam Avenue will help draw traffic from Highway 22 into the Hamlet Core. The north side of Balsam Avenue is approximately 6.3 acres and comprises two occupied residential lots, five commercial lots occupied with single use retail and service businesses, and a Telus utility building.

There may also be an opportunity to intensify existing commercial sites within the Bragg Creek Hamlet. Existing shopping centres, such as Bragg Creek Shopping Centre, Banded Peak Mall, and Front Porch Square have the potential to add new retail space due to their site size. Redeveloping existing shopping centres would be challenging as it would take existing businesses offline during the construction process. The ability for businesses to relocate during the construction process would be challenging due to the low vacancy rate of the Bragg Creek Hamlet. However, there may be an opportunity in the future to relocate existing businesses to newly constructed spaces, such as Gateway Village, thereby allowing an existing shopping centre to redevelop without losing the small businesses which make Bragg Creek unique.

Finally, there may be an opportunity for new retail commercial space along White Avenue, also referred to as Heritage Mile. However, due to the character of Heritage Mile this opportunity is limited, and new business growth will likely be more organic in nature.

8 Strategic Recommendations

The previous section of the report provided our analysis of market demand, required commercial land, and recommendations related to the location of new development. This section of the report provides strategic recommendations that will enhance the commercial environment of the Bragg Creek Hamlet.

Overall, the Bragg Creek Hamlet has a vibrant retail offering with unique local stores and a low vacancy rate. It has a complete retail and service offering that fulfills the day-to-day shopping needs of residents and tourists. The recommendations in this section of the report are intended to support future growth, as well as build resiliency in the retail environment through a diversification of offerings.

8.1 Temporary Uses

Bragg Creek is a seasonal tourism destination that experiences an inflow of visitor traffic in the summer. This seasonality can make it challenging to maintain a balanced retail offering, often resulting in under supply in the summer or over supply in the winter. Temporary uses, such as a pop-up market or micro retail units, can enhance the retail offering during the summer months making Bragg Creek a more attractive place to live and visit.

A pop-up market can provide a unique shopping experience in the summer months, introducing new retailers and providing affordable space for local artisans to open their first physical store or test new concepts. There are many examples of pop-up markets being successful in locations that are both rural and seasonal. A great example of this is SWS Boatworks in Muskoka, Ontario. SWS Boatworks is a marina located in cottage country in Ontario. In the summer months, the marina hosts a pop-up market that includes a variety of retail and service tenants in shipping containers. Over the years, the market has featured local and national brands, such as Lululemon, Waxon Wax Bar, Saje Natural Wellness, E-Foil Sports and Roots. Throughout the summer, the market hosts a variety of events including live entertainment, waterski shows, yoga, and others.

SWS Boatworks, Muskoka

8.2 Artisanal Uses

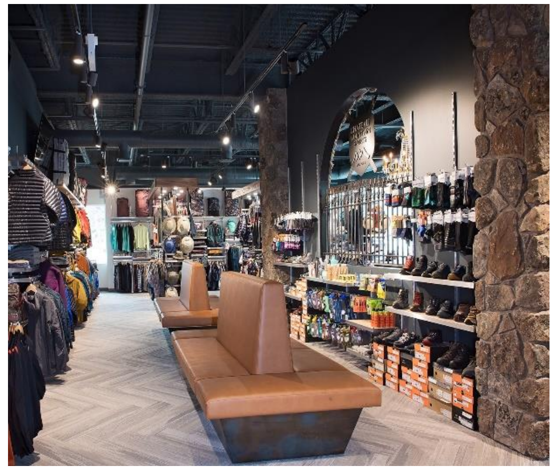
As discussed in this report, the Bragg Creek Hamlet has a strong presence of artisanal uses with art galleries, maker spaces, and hand crafted goods. In addition, there are two developments proposed to include breweries and a coffee roaster.

The County should continue to support these types of uses through flexible Land Use Bylaws. Land Use Bylaws should permit multi-use spaces that include retail, as well as production. This may include uses such as coffee roasting, alcohol production, glass blowing, and others.

The County should also encourage and implement public events that support local artisans while enhancing Bragg Creek's tourist function. This may include public markets, art shows, buskers, and beer or alcohol festivals, among others. Examples include the Canmore Festival of Art and Creativity, a three day community celebration that includes free drop-in workshops, demonstrations, hands-on activities, and live performances, as well as a Mountain Made artisan market and Bike Shorts Film Festival.

8.3 Connecting the Retail Experience to the Outdoors

Bragg Creek is a well known destination for outdoor activities, including hiking, mountain biking, cross country skiing, snowshoeing, and horseback riding. Outdoor recreation oriented businesses in the Bragg Creek Hamlet are mostly limited to Cycle 22x and Handle-Bar. There may be an opportunity to actively target sporting goods stores, such as clothing or equipment rentals, or businesses that offer tours, guides, and other experiences.



Chateau Mountain Sports, Canmore

8.4 Evening Economy

Bragg Creek is largely a daytime economy. The Visitor Friendly Implementation Report found that stores in Bragg Creek have a wide range of opening and closing hours. Opening hours range from 8AM to 1PM and closing hours range from 5PM to 9PM. In addition, store hours change on a seasonal basis.

The majority of retailer stores in Bragg Creek close between 5PM and 6PM with restaurants staying open later, typically between 7PM and 8PM. The evening economy can provide many benefits: Stores that close before 6PM represent a significant infrastructure that can contribute to the vitality, attractiveness, and overall economic viability of the Hamlet Core; it can support restaurants that may find it difficult to attract visitors during the week; and it can increase the attractiveness of the Hamlet Core to visitors.

Currently, it would be challenging to develop a viable evening economy in Bragg Creek. Overall, there is a lack of overnight accommodation in Bragg Creek which limits tourism to day trips. However, there are two proposed developments that include overnight accommodations, Gateway Village and The Laskin. These developments will generate more overnight trips creating new opportunities to enhance the evening economy in Bragg Creek.

8.5 Management Organization

There is no single entity officially tasked with guiding or assisting with business or property development or with marketing Bragg Creek. It is the opinion of TR that such an organization would be highly advantageous for Bragg Creek, playing a central role in programming and events, guiding property renovations and attracting new tenants, aligning businesses in terms of store hours, and many other factors.

A Business Improvement Area (BIA) might be a logical organizational model. While a BIA is the most common type of downtown management entity in Canada, it is not the only downtown management option. In the US, the Main Street Programme is the most popular downtown management model, with nearly 2,000 towns and cities participating.

The Main Street Programme has been brought to Canada at various times over the past 40 years by the National Trust for Canada, which offered a similar program – Rue Principale – in the 1980s and now offers Regeneration Works, and by the Ontario Ministry of Agriculture, Food, and Rural Affairs (OMAFRA), whose Downtown Revitalization Program advocates creation of a volunteer Management Committee, representing a broad range of downtown stakeholders, and several working groups, each focusing on one of the four areas of work advocated by the Main Street Programme (design, organization, promotion/marketing, and economic development). But a community need not be part of an umbrella organization like the National Trust or OMAFRA to launch an independent Main Street Programme; any community can choose this organizational model. Some key characteristics:

- The organization should be guided by a volunteer board of directors representing a broad range of district and community stakeholders.

- It should have several strong working committees, one for each of the district's major strategic imperatives, and access to specialist volunteers who can provide guidance on architectural design, urban design,

Lilac Festival, 4th Street BIA, Calgary

marketing, visual merchandising, public relations and other necessary subjects.

- It should have full-time professional staff to manage the day-to-day activities needed and to help ensure that the committees and specialist volunteers are on track and moving forward in carrying out the organization's strategies.
- It should be financially supported by both the public and private sectors, with fund raising the responsibility of the board of directors (not the staff).

Its work should be guided by strategic plans of 3-5 years in scope, with the plan adjusted annually to reflect activities completed and emerging opportunities. The strategic plan should serve as a litmus test for deciding which activities the organization should pursue, with a tight focus on activities that most directly advance the strategic imperatives.

8.6 Density

A key recommendation of the Bragg Creek Revitalization Plan is to create a compact, walkable, mixed-use Hamlet Core. Achieving this vision does not necessarily require traditional mixed-use development with ground floor retail and residential units above. Introducing development that is more compact, whether it be residential or commercial, can help create a more walkable, pedestrian oriented environment. This can be done in a way that activates the street edge and creates pedestrian connections between existing commercial centres. For examples, townhouses, multi-tenant commercial buildings, or live-work units can be designed to activate the street.

While not required to achieve this vision, there may be opportunities for mixed-use development within the Hamlet Core in the future. The proposed Gateway Village has the potential to initiate the transition towards mixed-use development within the Hamlet Core. Gateway Village is proposed to include a Commercial Village with 26,000 square feet of ground floor retail space in a mixed-use format.

Gateway Village Mixed-use Rendering

While a more recent trend, there are examples of mixed-use developments within smaller rural towns:

- 514 Victoria: Mixed-use project under construction in Nelson, British Columbia. Nelson has a population of 11,100 persons;
- Mackenzie Village: Mixed-use master planned community under construction in Revelstoke, British Columbia. Revelstoke has a population of 8,300 persons; and,
- 35 St. David Street: Mixed-use development recently completed in downtown Goderich, Ontario. Goderich has a population of 7,900 persons.

514 Victoria, Nelson

Mackenzie Village, Revelstoke

35 St. David Street, Goderich

There may also be an opportunity for live-work development. This type of development can encourage development and intensification in the short term while preserving the ability to provide commercial uses over the long term, as demand materializes. In addition, live-work units can accommodate traditional retail and service uses, or office space, capitalizing on the growing trend towards remote work. This can be an opportunity to attract a move diverse economic employment base.

Metro Plateau, Jackson Hole

Despite this, mixed-use development is challenging in suburban and rural environments. Access to ground level parking, loading zones, noise, smell, vermin, security, visibility, signage, and floorplates are all factors that make mixed-use development challenging from the perspective of potential retailers and residents. Even in the Country's largest urban centres, there are failed mixed-use developments where the ground floor remains vacant, which has a negative affect on the pedestrian environment.

8.7 Land Use Districts

There is one commercial Land Use District in the Bragg Creek ASP. The Commercial, Local Urban District (C-LUD) is intended to "…accommodate small scale business within Hamlets and comprehensively planned area, in a manner sensitive to adjacent uses." The C-LUD designation permits a full range of retail, service and office uses. Non traditional commercial uses include agriculture, alcohol production, automotive services, communications facilities, outdoor storage, and recreation.

To encourage mixed-use development within the Hamlet Core, a more appropriate Land Use District may be Commercial, Mixed Urban District (C-MIX). The purpose of the C-MIX designation is to "…provide for small scale business needs in support of comprehensive communities, where mixed use building may accommodate a variety of business types and scale. Development is intended to serve small to moderate sized residential communities and provide opportunities for local employment." The C-MIX designation permits a wide range of retail and service uses, as well as multiple unit residential and hotel / motel.

However, the C-MIX designation does not have a requirement to provide non-residential space within developments. It may be appropriate to implement a special provision requiring a non-residential component for new developments within the Hamlet Core. This is often necessary to ensure that commercial land is not developed for residential uses, thereby reducing the available commercial land supply. However, not all sites within the Hamlet Core will be well located for commercial development. As such, there should be planning mechanisms to amend the policies in areas where retail is not appropriate, due to its locational characteristics.

Appendix A

The following points summarize the methodology used in the market demand analysis:

- The average per capita expenditure of Alberta residents for Non-Food & Beverage Retail and Food & Beverage Retail was calculated based on Statistics Canada Retail Trade data. This includes per capita spending for each individual retail category, as well as the distribution between in-store spending and e-commerce;

- The average per capita spending for the Province was adjusted to account for the demographic profile of Bragg Creek ASP residents. The average income of Bragg Creek ASP residents was indexed to the Province and input into a regression analysis which accounts for the income elasticity of Non-Food & Beverage Retail and Food & Beverage Retail spending;

- After accounting for e-commerce and the income of Bragg Creek ASP residents, per capita expenditures were multiplied by the Bragg Creek ASP population to arrive at the total Bragg Creek ASP expenditure potential for each retail category;

- A portion of Bragg Creek ASP expenditures will be spent at stores outside of the Bragg Creek Hamlet, such as in Calgary and Cochrane. For each retail category, TR estimated the proportion of expenditures spent within the Bragg Creek ASP. This capture rate is based on a number of factors, including population distribution, drive times, cellular location data, and the professional experience of TR;

- Similarly, there will be expenditures that originate from residents beyond the Bragg Creek ASP, also referred to as inflow. Inflow can originate from residents living in the area surrounding the Bragg Creek ASP, as well as visitors and tourists from throughout the Province and beyond. For each retail category, TR estimated the inflow of dollars from outside of the Bragg Creek ASP, based on the factors outlined above, as well as tourism data examined in the previous section of the report;

- The resulting figure represents existing Bragg Creek Hamlet store sales. TR forecast an increase in sales at existing Bragg Creek Hamlet stores over the forecast period;

- The residual demand was calculated by subtracting existing Bragg Creek Hamlet store sales from the total Bragg Creek ASP expenditures. Residual demand represents the amount of dollars available to support new retail space within the Bragg Creek Hamlet and Expansion Lands;

- Using industry standard sales per square foot levels the residual demand was converted into warranted additional retail space for each category; and,

- The market demand for service space has been calculated using a different methodology than that of retail space. Statistics Canada does not publish sales data for service businesses and as such, an expenditure based approach is not possible. TR has utilized a per capita methodology to quantify Bragg Creek ASP demand for service space. This approach consists of identify the amount of space required per capita for each service category and applying it to the population growth. This results in the amount of service space required to serve new Bragg Creek ASP residents.