

Context Setting Report

HIGHWAY DEVELOPMENT STRATEGY



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This report was prepared by V3 Companies of Canada Ltd, Attract Investment Consulting and Location Strategies, in partnership with the Town of Stony Plain.

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1 CONTEXT SETTING

STONY PLAIN'S HIGHWAY DEVELOPMENT STRATEGY

1.1 The Project

The town of Stony Plain is completing a Highway Development Strategy (herein referred to as “the Strategy” or “HDS”) to guide a targeted investment attraction program for the Highway 16A and Highway 628 corridors. The Strategy will include significant research, analysis, and engagement to contribute to the town’s progressive outlook and foster a more dynamic and prosperous corridor to support Stony Plain’s economy. The HDS falls within the context of regional initiatives in investment attraction with Edmonton Global, along with the creation of Invest Alberta Corporation, and economic diversification. In turn, this work will increase opportunities brought about by social, environmental, and technological dynamics, while identifying how the town will leverage these opportunities in the short, medium, and long term, to enhance Stony Plain’s attributes through targeted investment attraction.

The goals of the HDS are to create a Strategy that is:

- ▶ Relatable and contains a shared vision, with buy-in from decision-makers, strategy implementors, businesses, landowners, and future investors;
- ▶ Forward thinking, matching the Town’s progressive but pragmatic mindset; and,
- ▶ Meaningful, implementable, and actionable.

The HDS is being developed to enhance the competitiveness of the Highway 16A and Highway 628 corridors and is a guide for the municipality to attract commercial and industrial investment to Stony Plain. The strategy is a living document that will be reviewed and updated to reflect changing objectives, priorities, and market conditions. The town will track progress and learning outcomes to inform future implementation activities, thereby optimizing effectiveness in increasing economic benefits for the municipality. As the town of Stony Plain is located within the Edmonton Metropolitan Region and shares municipal borders with the City of Spruce Grove and Parkland County, the importance of adopting an integrated approach with a shared vision and coordinated investment is critical.

The recommendations contained within the HDS form the foundation for additional, focused, and aligned discussions regarding implementation. It will be important to ensure that the Strategy becomes embedded in local decision-making processes. It is only by working collaboratively within the greater context of the region – in an integrated way with a shared agenda – that the full potential of the HDS will be realized.

1.2 The Purpose

The purpose of this Context Setting Report (“the report”) is to summarize the baseline research completed to-date to provide the project team with a frame-of reference for both the town as a whole and the specific study area being addressed by the Strategy. Several data sources were taken into consideration, including existing demographic conditions, economic and population data and forecasts, statutory planning documents and districting, and existing infrastructure. The report was compiled using desktop research and analysis and includes a synopsis of information obtained through public record, previous studies and reports pertaining to the town and adjoining municipalities, information provided by third parties (railway, utilities, etc.), and town administration.

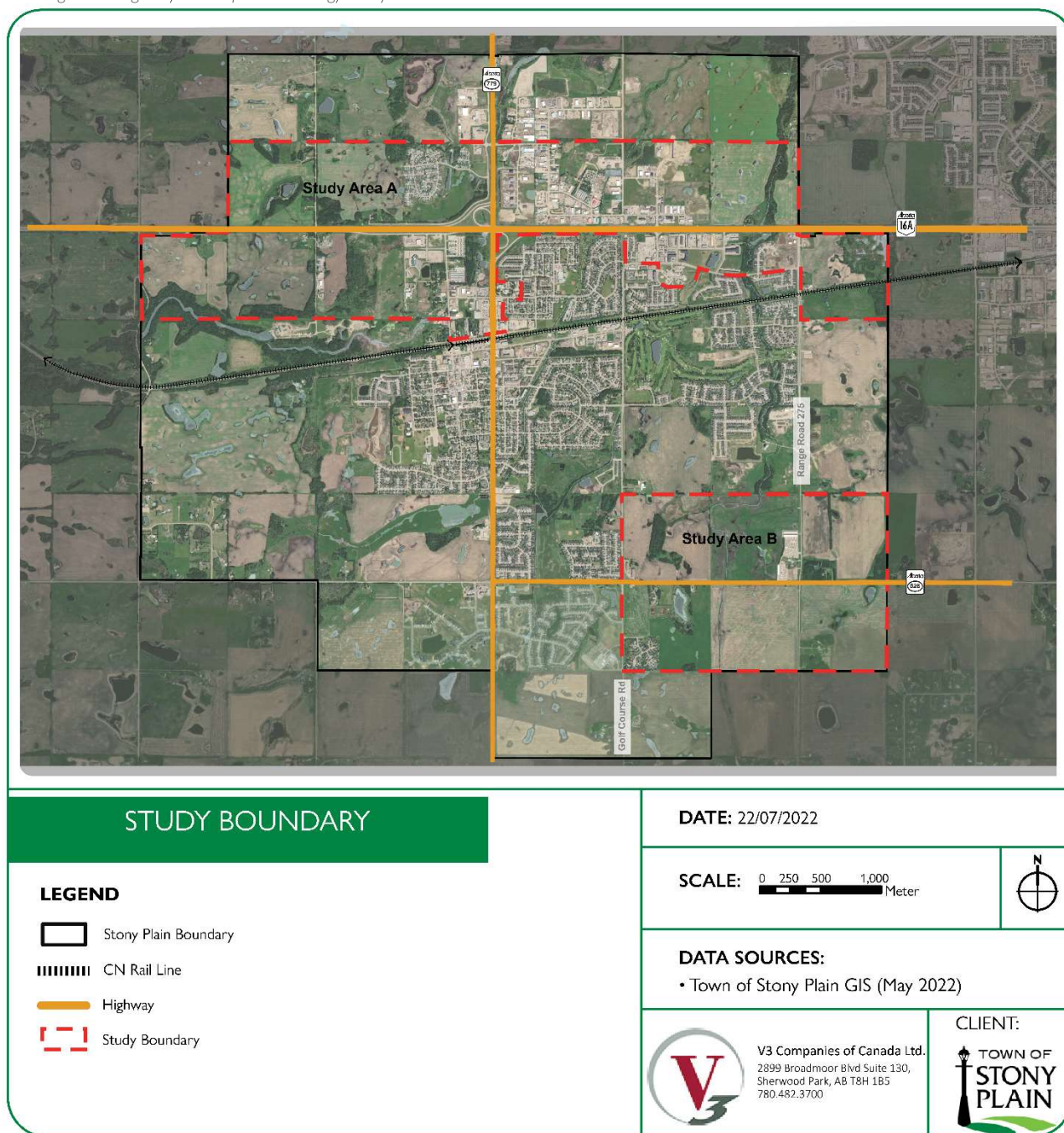
The report is organized into four major parts:

- ▶ **Plans, Policies, and Strategies** – provides a synopsis of Stony Plain’s current plans, policies, and strategies, and how they may influence the recommendations report and the Strategy.
- ▶ **Development Patterns and Taxation** – provides a synopsis of Stony Plain’s development patterns, opportunities, constraints, and their ties to land use utilization, business licenses, and taxation, shown through extensive community mapping.
- ▶ **Economic Base and Retail Trade Area** – provides a synopsis of Stony Plain’s existing demographic profile, economic base, and findings from the cursory review of retail trade area.
- ▶ **The Path Forward** – provides a summary of how findings will direct discussions during engagement, developing the recommendations report, and the creating the Strategy.

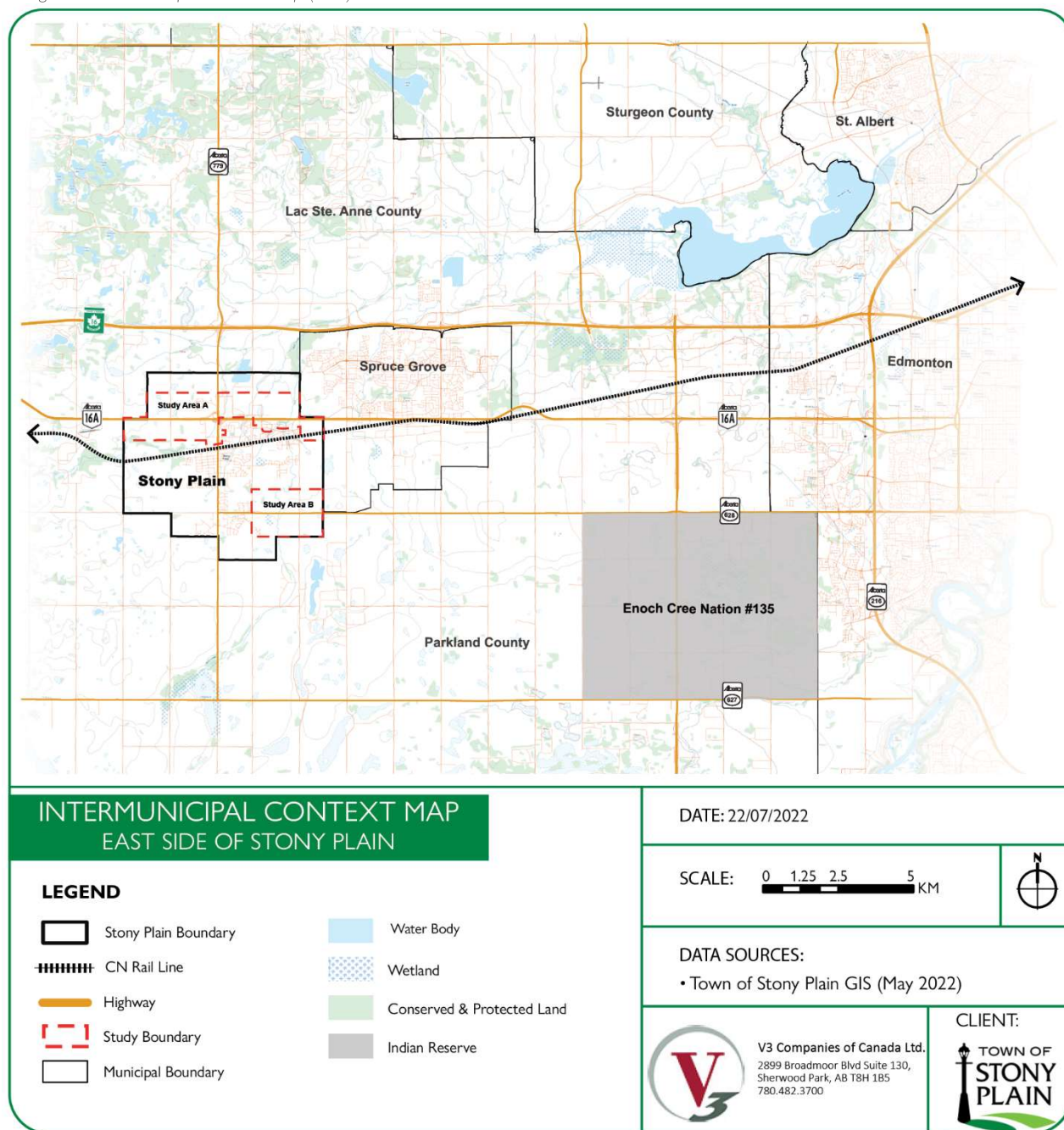
1.3 The Context

The first step in this project was for the project team to set the parameters of the Strategy. Figure 1: Highway Development Strategy Study Area identifies the location and boundary of the study areas within the town of Stony Plain. Figures 2-4 provide intermunicipal and regional context for the study areas. In total, the land area of the study is approximately 1,240 ha in size, covering 33.7% of the total land area of the town of Stony Plain.

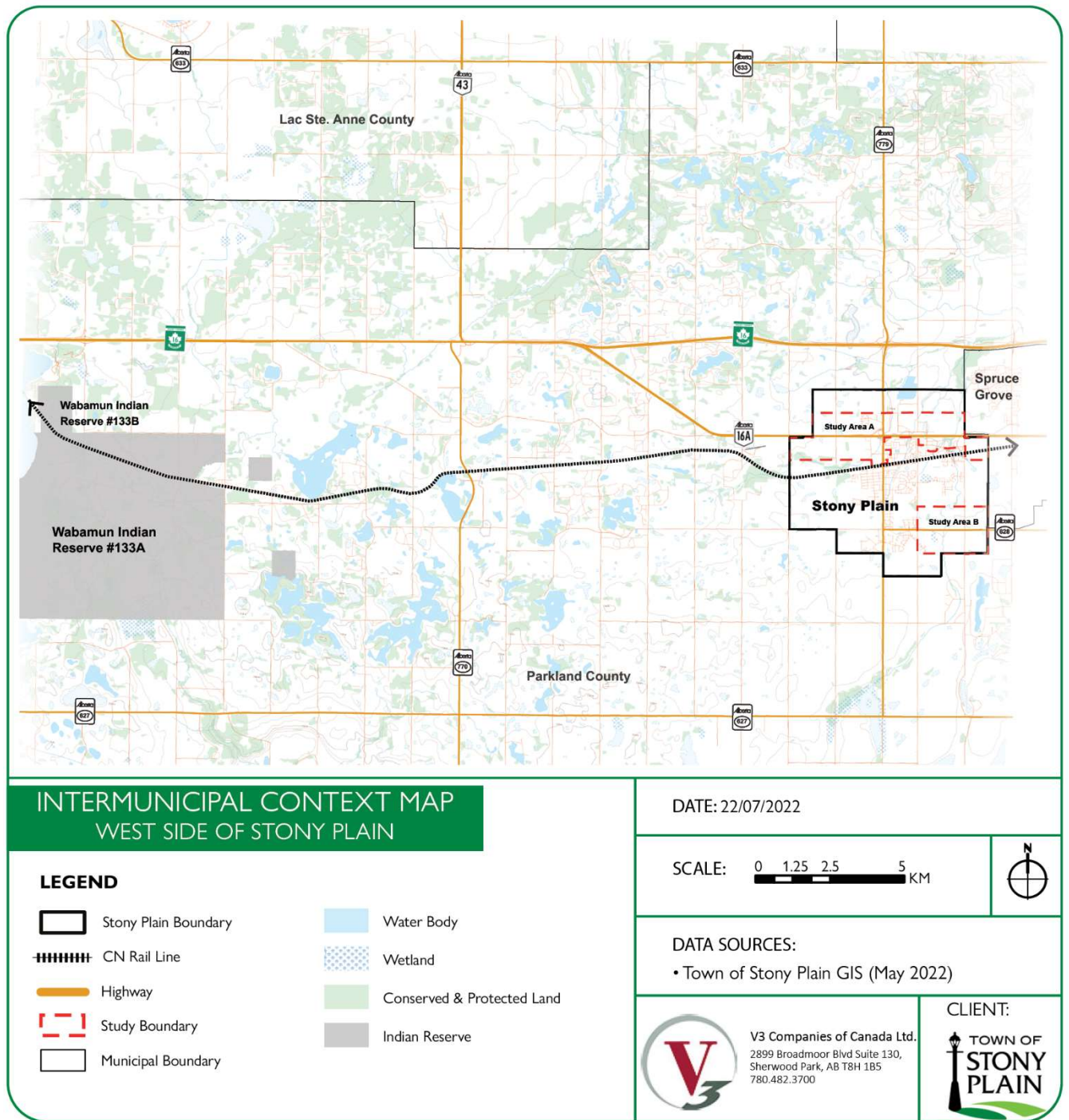
▼ Figure 1: Highway Development Strategy Study Area



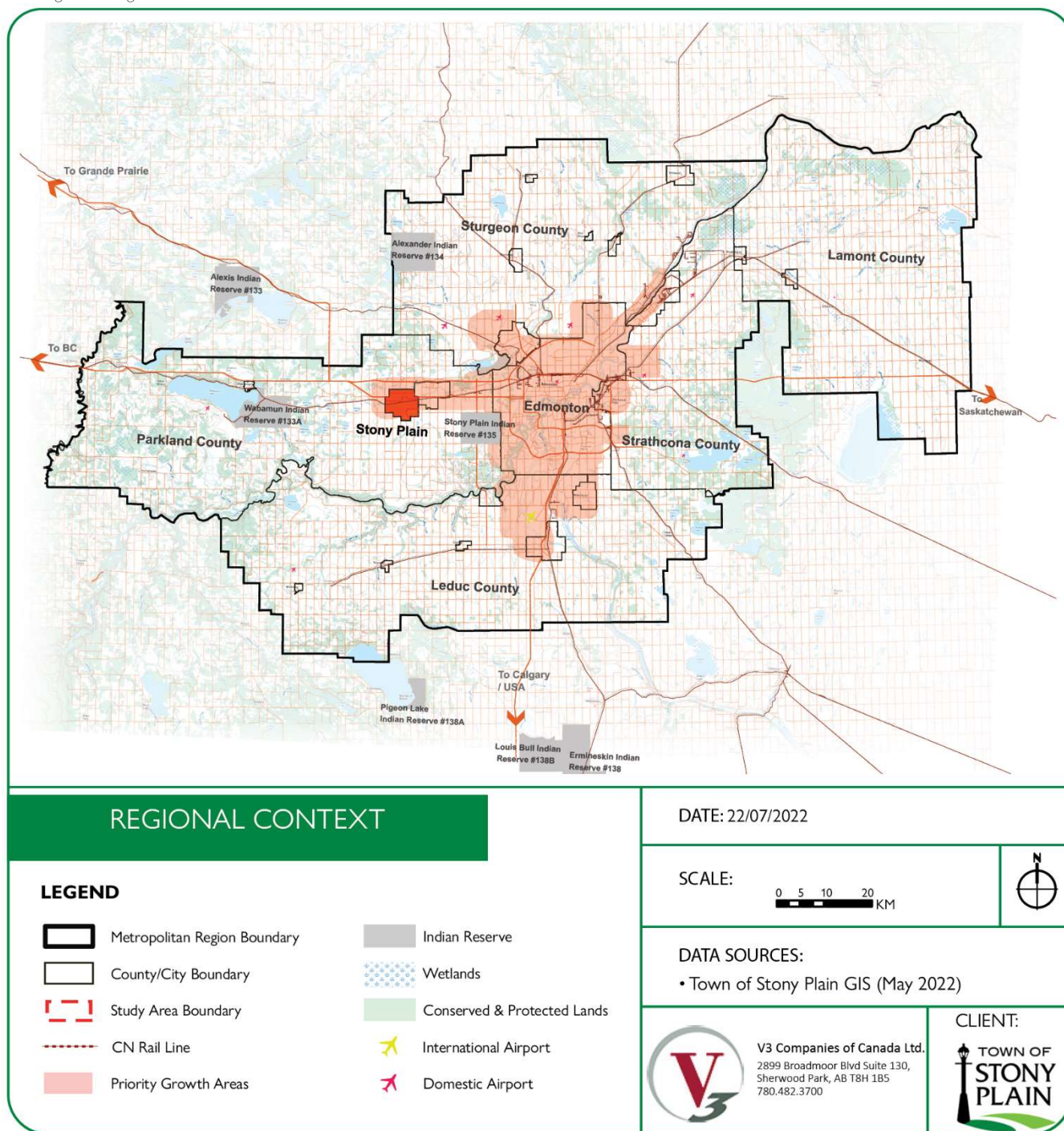
▼ Figure 2: Intermunicipal Context Map (East)



▼ Figure 3: Intermunicipal Context Map (West)



▼ Figure 4: Regional Context



2 PLANS, POLICIES, AND STRATEGIES

UNDERSTANDING THE NOW, CONTEXTUALIZING THE FUTURE

Several town documents, including statutory and non-statutory planning documents, infrastructure studies and master plans, and other strategies were reviewed as part of this report. Most of these documents have influenced how Stony Plain has developed over time, and provide the framework for the future development of the town as a whole. This section outlines the reviewed documents, highlighting key components that may influence the recommendations report and/or the Strategy. Some documents may be studied further as the project progresses and as deliverables are being formulated.

The reviewed documents include:

Planning Documents

- ▶ Edmonton Metropolitan Region Growth Plan
- ▶ The Tri-Municipal Regional Plan
- ▶ The Municipal Development Plan
- ▶ Area Structure Plans (applicable to the study area)
- ▶ Land Use Bylaw

Infrastructure Master Plans

- ▶ Stormwater Management Master Plan
- ▶ Water and Sanitary Master Plan
- ▶ Transportation Master Plan

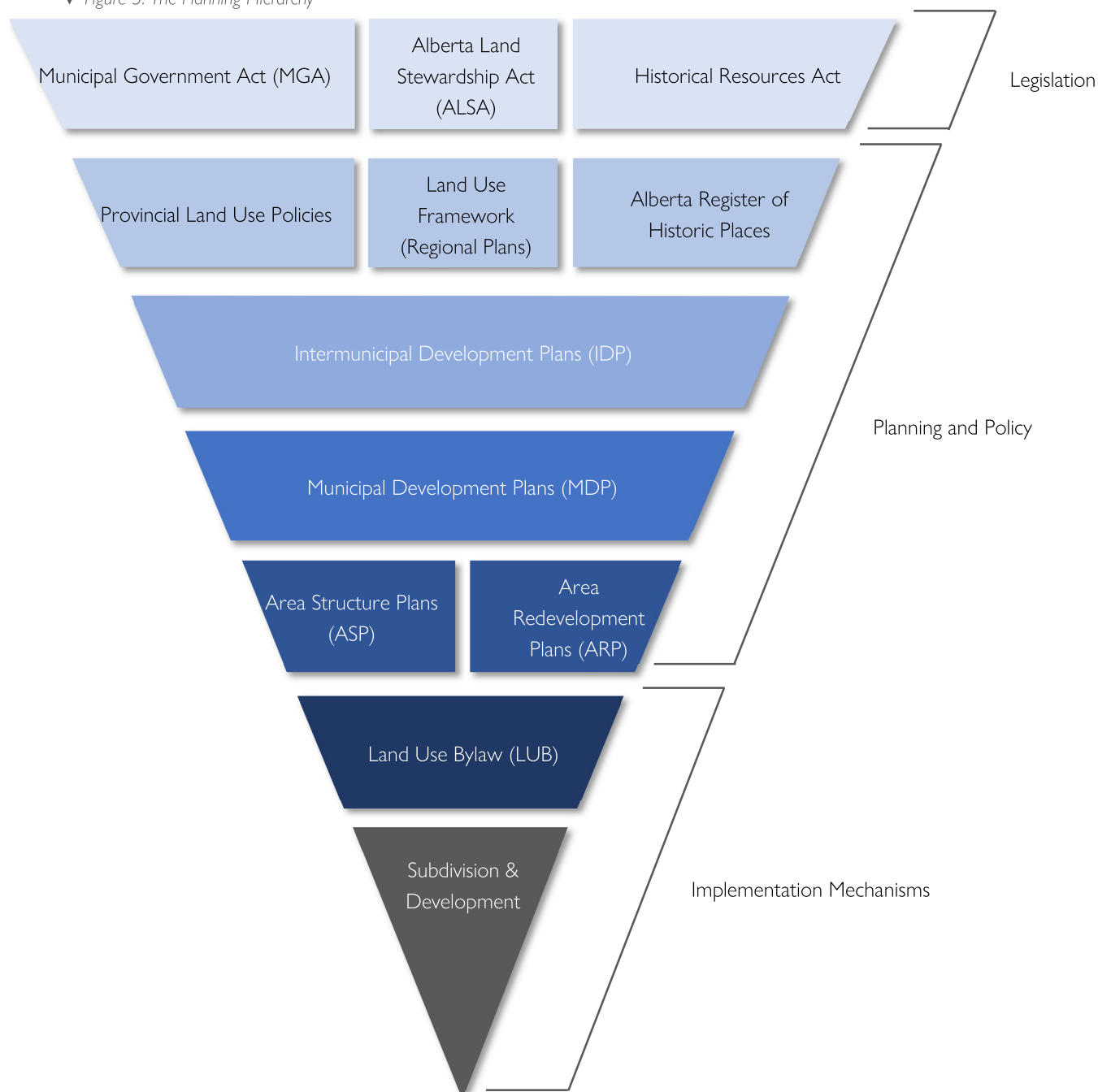
Other Documents

- ▶ Strategic Plan 2022-2025
- ▶ Corporate Plan 2022-2024
- ▶ Economic Development Strategic Plan
- ▶ Environmental Master Plan
- ▶ Tourism Master Plan
- ▶ Housing Strategy
- ▶ Offsite Levy Bylaw (2021)

2.1 Planning Documents

The following is a review of the statutory plans relevant to the HDS study areas. Figure 5 shows the Planning Hierarchy, or the level of each planning document and its interaction with other documents, filtering from the provincial policy level down to development of an individual parcel. These documents, while noted as being planning documents, interact and influence other town plans, policy documents, and strategies (and vice versa). These include documents such as the Stormwater Management, Transportation and Water Sanitary Master Plans.

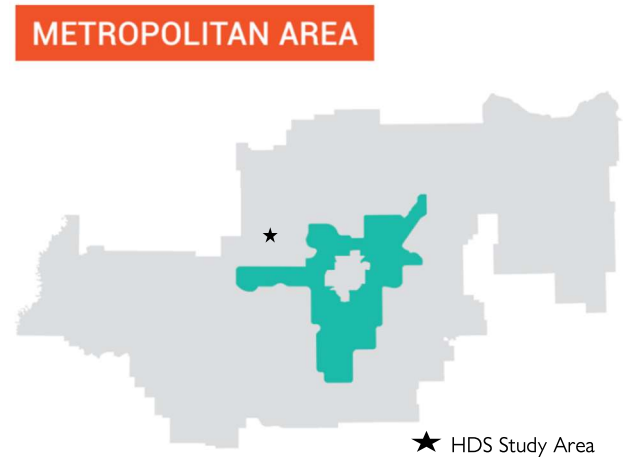
▼ Figure 5: The Planning Hierarchy



2.1.1 Edmonton Metropolitan Region Growth Plan

The Edmonton Metropolitan Region Growth Plan (EMRGP) establishes an innovative path to plan and manage growth across the Edmonton Metropolitan Region, consisting of twenty-four rural and urban municipalities and their associated natural assets, resources, and agricultural lands. The EMRGP sets the path for sustainable growth and development in the Region through organized, evidence-based, and systematic planning. The EMRGP provides a comprehensive and integrated policy framework that plans for population and employment growth to 2044. The plan includes a 50-year vision, guiding principles, and a regional structure consisting of three policy tiers: a rural area, a metropolitan area, and a metropolitan core, which reflect the diverse Edmonton Metropolitan Region Board members. It also includes six interrelated regional policy areas that address the different urban and rural contexts and unique growth challenges in the Region.

▼ Figure 6: Metropolitan Area, from the Edmonton Metropolitan Regional Growth Plan



The HDS study area is within the “Metropolitan Area” policy tier of the EMRGP. This area includes a mix of urban and rural development, major and local employment areas that are socio-economically dependent, with strong ties between industry, housing, and associated infrastructure. The metropolitan area encompasses the highest concentration of existing and future urban development in the Region and reflects the general direction of future urban growth for the Edmonton Metropolitan Region.

The purpose of reviewing the EMRGP is to understand the planning relationship that Stony Plain shares with the Edmonton Metropolitan Region and markets outside of Alberta. As one of the main goals of the EMRGP is to promote global economic competitiveness and regional prosperity, it is important to consider commercial and industrial development in Stony Plain within the context of the town’s regional partners. Competing against other municipalities in the region for a commercial or industrial market that is already well served may provide few benefits for the town or decrease the competitiveness of the region overall. This will influence the development of the HDS by ensuring that the plan works within the established development context of Edmonton Metropolitan Region for the benefit of all.

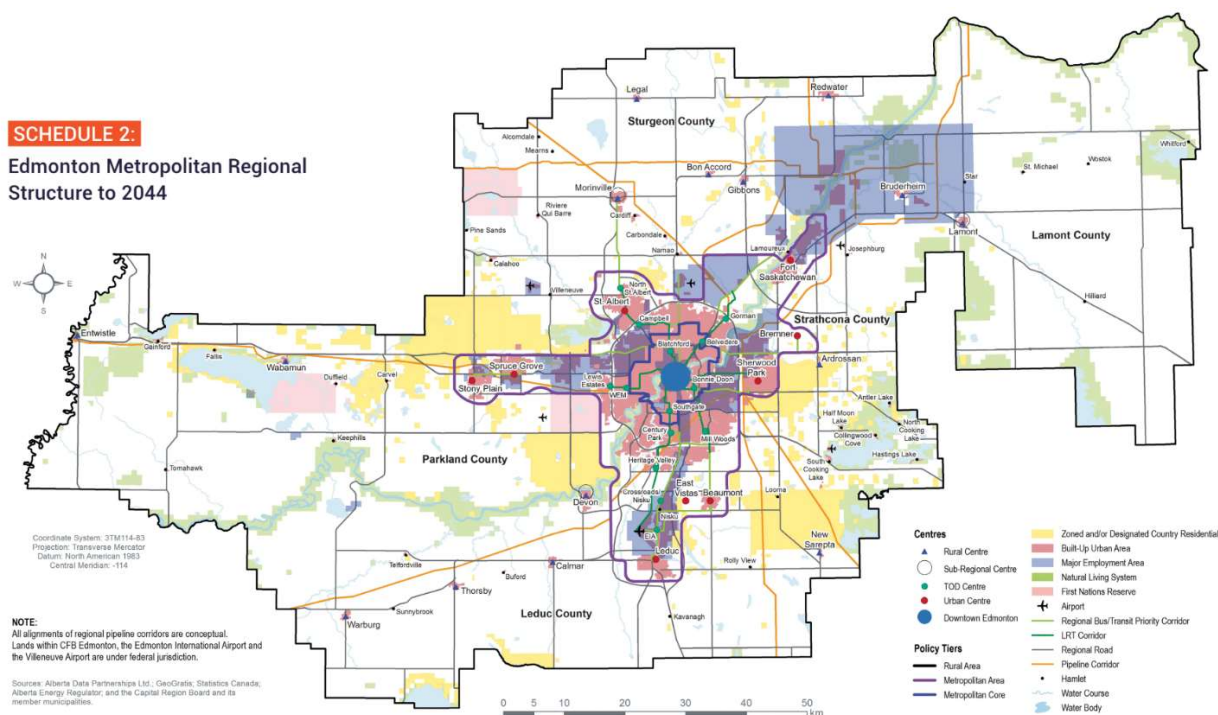
The EMRGP contains six interrelated regional policy areas to support where and how to manage growth, of which three are directly applicable to the HDS. The three relevant policies and their guiding principles relevant to the HDS are found below and must be considered when planning for the attraction and development of commercial and industrial businesses within the Edmonton Metropolitan Region:

REGIONAL POLICY	GUIDING PRINCIPLE
ECONOMIC COMPETITIVENESS & EMPLOYMENT	<ul style="list-style-type: none"> Promote global economic competitiveness and regional prosperity. Foster a diverse and innovative economy that builds upon our existing infrastructure and employment areas to achieve sustained economic growth and prosperity.

REGIONAL POLICY	GUIDING PRINCIPLE
INTEGRATION OF LAND USE & INFRASTRUCTURE	<ul style="list-style-type: none"> Achieve compact growth that optimizes infrastructure investment. We will make the most efficient use of our infrastructure investments by prioritizing growth around existing infrastructure and optimizing use of new and planned infrastructure.
TRANSPORTATION SYSTEMS	<ul style="list-style-type: none"> Ensure effective regional mobility. Recognizing the link between efficient movement of people and goods and regional prosperity, we will work towards a multi-modal and integrated regional transportation system.

Likely the most critical takeaway of reviewing the EMRGP and how it relates specifically to the study boundary is reviewing Schedule 2: Edmonton Metropolitan Regional Structure to 2044 (adapted and shown in Figure 7 of this report). This map designates future land uses from a regional perspective. If the HDS recommends changes to the town's Municipal Development Plan or any of the applicable area structure plans, the EMRGP may also require amending if it does not align, which could be viewed as a challenge. Currently, some of the land within the town is designated as a future major employment area does not appear to include all the areas identified with the HDS.

▼ Figure 7: Schedule 2 – Edmonton Metropolitan Regional Structure 2044, from the Edmonton Metropolitan Regional Growth Plan



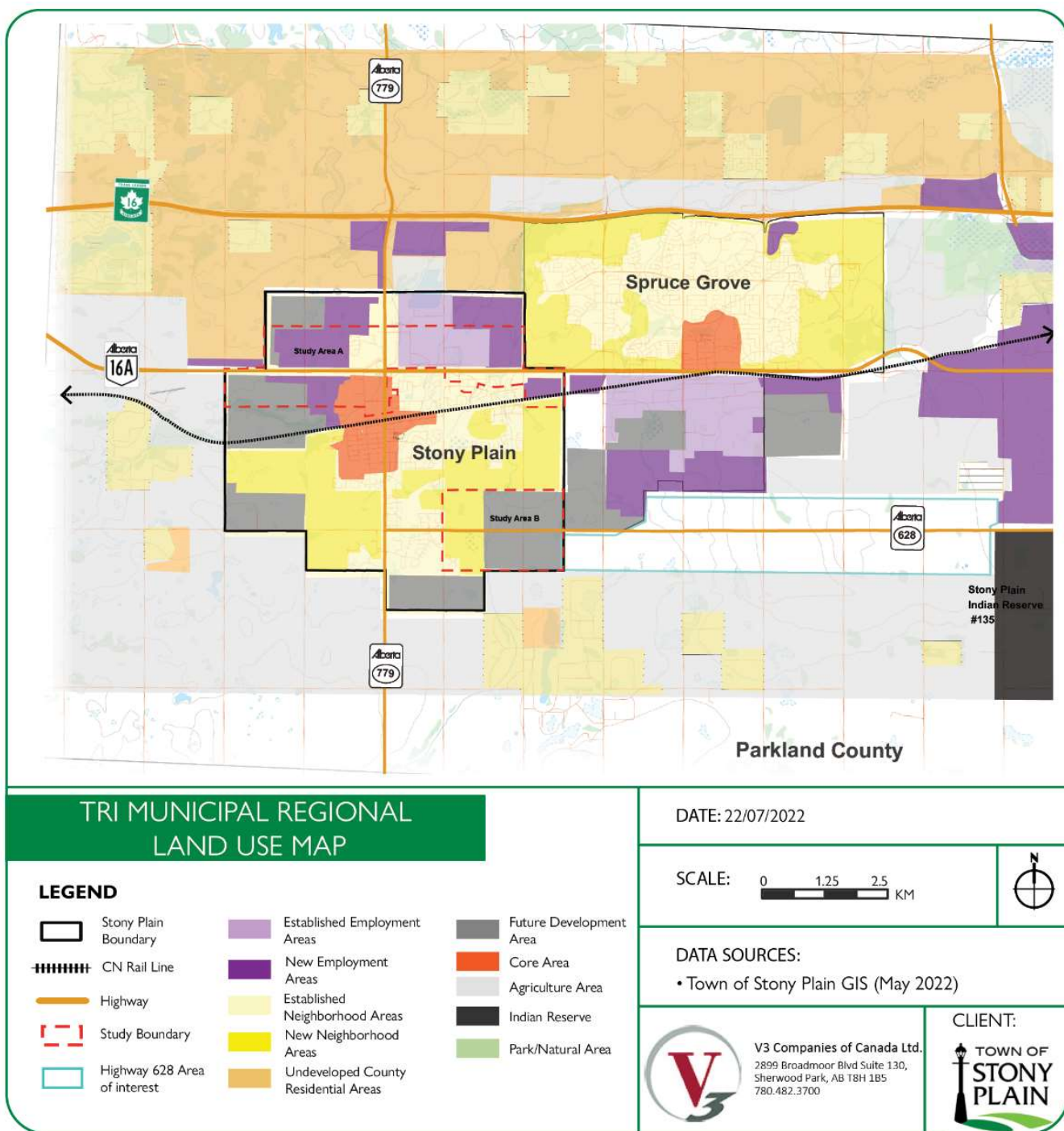
2.1.2 Tri-Municipal Regional Plan

The Tri-Municipal Regional Plan (TMRP) is a partnership between the town of Stony Plain, the City of Spruce Grove, and Parkland County that seeks to improve governance, service delivery, fiscal capacity, and economic prosperity for the benefit of the citizens of the Tri-Municipal Region. It enables the Tri-Municipal Region partners to strategically align planning for growth and service delivery to achieve mutual benefit for the entire area. The TMRP provides recommendations that may be implemented over the next 40 years. In essence, the TMRP is an Intermunicipal Development Plan (IDP). An IDP is intended to guide and assist development in and around shared boundaries of municipalities, taking place in an environmentally responsible and sustainable manner without significant unnecessary costs and unacceptable negative impacts on any municipality. Ultimately, an IDP is a broad, long-range planning tool to manage decision-making for an area of land in close proximity to a shared boundary.

The purpose of reviewing the TRMP is to understand the planning relationship that Stony Plain shares with its immediate neighbours. As one of the main goals of the TMRP is to strategically plan for economic growth, it is important to understand how Stony Plain approaches the attraction and development of commercial and industrial partners in relation to its context within the sub-region. This will influence the development of the HDS by ensuring the plan works within the established development context of the sub-region to improve economic prosperity for all.

In accordance with Figure 8: Tri Municipal Regional Land Use Map, the town has a number of lands designated as “new employment areas” falling adjacent to Highway 16A and within the study boundary; there are also lands designated as being appropriate for “future development” (with less definition of what future development is envisaged in these areas). Interestingly, beyond those areas already experiencing development within the town (identified as being “established neighbourhood areas” or “core areas”), the study boundary adjacent to Highway 628 has approximately two quarter sections designated as “new neighbourhood areas”, meaning the intention is for these land areas to be developed for residential purposes.

▼ Figure 8: Tri-Municipal Regional Land Use Map



From a regional perspective, there are areas both within Parkland County and the City of Spruce Grove that are designated as future employment areas, notably the lands immediately north of the town in the County (along Highway 779 and Highway 16A) and immediately east of the town in the City (along both Highway 16A and Highway 628). Given the close proximity to these areas, it will be important that the HDS considers the regional areas designated for growth when looking at specific commercial or industrial industries to target.

Apart from reviewing the Tri-Municipal Regional Land Use Map, the following objectives and policies have been identified as being relevant for the HDS and should be considered when planning for the attraction and development of commercial and industrial businesses within the context of the Tri-Municipal area:

OBJECTIVES	POLICIES
ENERGIZING MUNICIPAL PROGRAMS	<ul style="list-style-type: none"> • Advance a long-term supply of investment ready sites in locations that support the Tri-Region's target sectors • Work with the federal and provincial governments and other funding partners to support infrastructure construction that brings new industrial land online and enhances existing business and industrial parks to meet target sector needs • Streamline and expedite development approvals
ENHANCING CAPACITY IN OUR REGION	<ul style="list-style-type: none"> • Leverage existing rail system • Leverage proposed new over-dimensional, overweight corridor • Leverage access to Highway 16A • Increase the number of grade-separated rail crossings
SUPPORTING GROWTH AND RESILIENCE	<ul style="list-style-type: none"> • Plan for active transportation redundancy • Develop an approach to encourage and facilitate urban infill development • Facilitate active transportation infrastructure at Provincial highways • Develop areas with mixed land use and a tighter transportation grid
INNOVATING REGIONAL SERVICE DELIVERY	<ul style="list-style-type: none"> • Plan for developer funded infrastructure • Plan for the development of the Highway 628 Corridor • Provide utility right-of-way to adjacent municipalities for cost effective servicing
COMPETITIVENESS REVIEW	<ul style="list-style-type: none"> • Lower cost option within Edmonton Metropolitan Region • Reputation of business-friendly environment, including taxes • Having strong access and infrastructure linkages including rail, road and telecommunications • Home to a young and growing population base with affordable living and good quality of life • Having an existing network of businesses seen as mutually reinforcing and creating a supporting ecosystem • Historically being more diversified, with representation across a variety of sectors and not overly 'energy dependent'
ECONOMIC DEVELOPMENT STRATEGY	<ul style="list-style-type: none"> • The communities of the TMRP through economic diversification into agri-food, engineering and construction, and industrial fabrication. • Commercial growth in retail, professional and medical services has been enabled by the rapid population growth in the Region.

	<ul style="list-style-type: none"> • Transportation, warehousing and logistics, value-added agriculture, and energy services are three predominant sectors where regional strengths align with those of the EMR and the investment attraction efforts of Edmonton Global. • The strategy identifies four high-level strategic priorities considered essential to advancing the Region's growth and sustainability over the long term. <ul style="list-style-type: none"> ○ Investment Readiness ○ Innovation and Entrepreneurship ○ Investment Attraction ○ Business Retention and Expansion
PREFERRED LAND USE CONCEPT	<ul style="list-style-type: none"> • Employment growth designation encompasses both industrial and large format commercial development. • Three evaluation scenarios included: <ul style="list-style-type: none"> ○ Equitable Distribution of residential, commercial, and industrial growth in the best suited locations within each municipality, with the allocation of residential, commercial, and industrial development in each municipality being proportionally driven by current population growth for each respective municipality; ○ Best Location which allocated residential, commercial, and industrial in the best suited locations regardless of municipal jurisdiction and distribution equity; and ○ Highway 628 centered around the premise of catalyzing commercial, industrial, and residential growth along the Highway 628 Corridor by leveraging the future anticipated investment in expanding and upgrading the corridor. • Best Location Land Use Scenario was selected <ul style="list-style-type: none"> ○ the Tri-Municipal Region will grow in a manner best utilizing land and achieving the best result from a market perspective regardless of municipal jurisdiction • The majority of lands identified for development over the course of the Tri-Municipal Region Plan have already been planned through adopted statutory plans, including various area structure plans (ASPs) and municipal development plans (MDPs). As a result, these previously approved plans have placed limitations on the development concept recommended as a result of this project as any deviations to previously approved plans would require amendments to them. • Financial Analysis shows that across the Tri-Municipal region as a whole, the overall infrastructure needs that have been reported by the municipalities and the land use plan can be met by the forecasted growth in the Preferred Land Use Concept plan.

2.1.3 Municipal Development Plan

A municipal development plan (MDP) is a key policy plan that communicates the long-term desired land use for the community. It is a high-level blueprint that shows how your community is expected to change over time and the shape it will take in the future. This document must be consistent with the Tri-Municipal Regional Plan and the Edmonton Metropolitan Regional Growth Plan.

Much like a blueprint that guides the construction of a house, a MDP helps many decision makers collectively build their shared and desired physical setting. This land base is typically limited and is expected to accommodate many activities and

functions. This means that choices must be made. Creating an MDP involves a process to help make these decisions and serves as a record of the choices that have been made for the community's benefit. The MDP provides a vision to ensure sustainable growth while balancing land use priorities with environmental, social, economic, infrastructure, and governance considerations. It is an important decision-making tool for residents, property owners, administration, and Council.

The purpose of reviewing the MDP is to understand the goals of the community in guiding development over the next 20-30 years. Understanding the long-term vision for Stony Plain is important to ensure the HDS is a realistic document that accurately reflects the commercial and industrial future of the town. While there are several directions and correlating policies that have been identified as being relevant to future commercial and industrial development, those key directions are noted below (Appendix A contains the associated key policies).

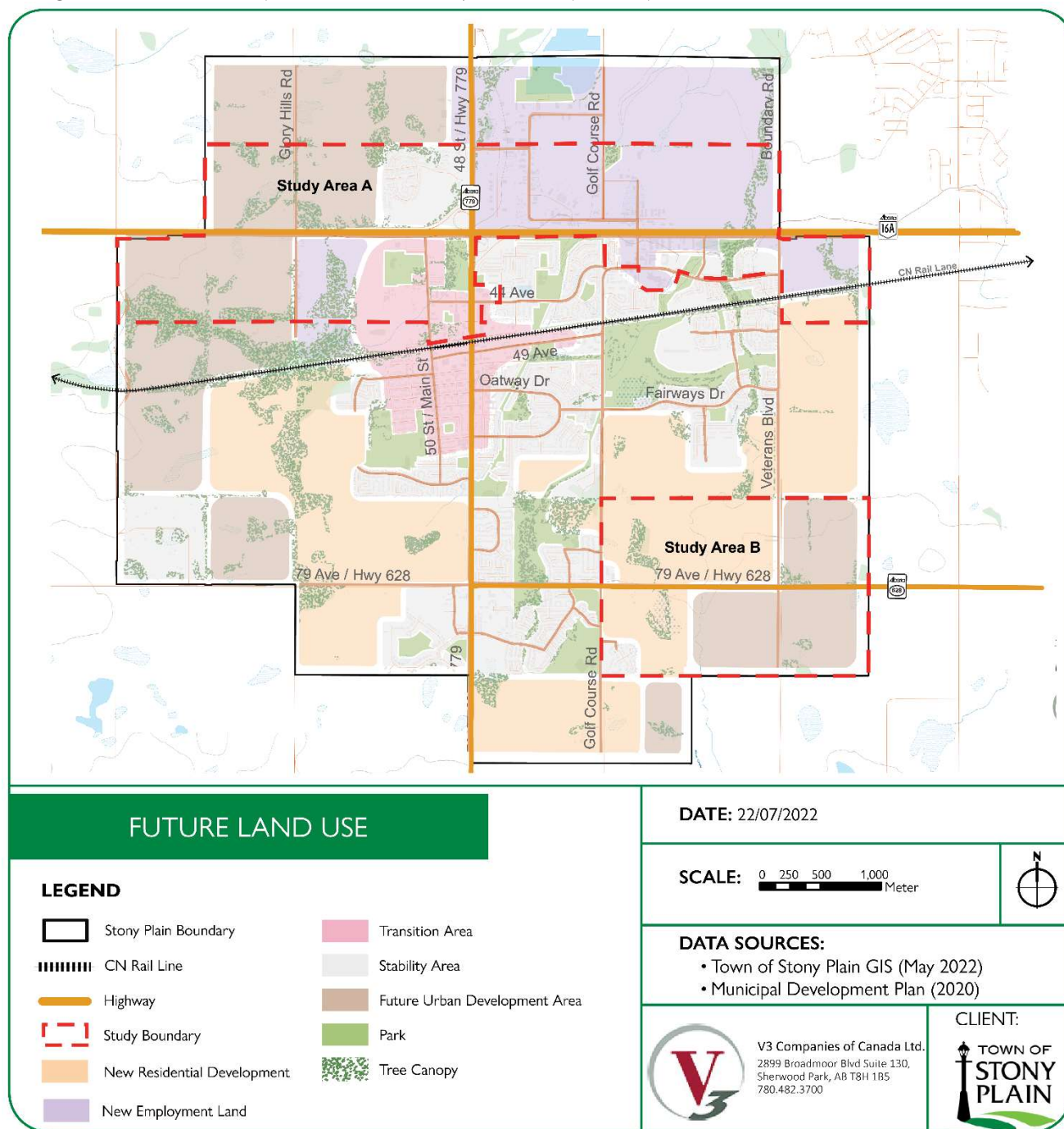
OBJECTIVES	KEY DIRECTIONS
ENVIRONMENTAL RESPONSIBILITY	DIRECTION 1.4: Avoid noise impacts and unwanted light
COMMUNITY DEVELOPMENT	DIRECTION 2.1: Encourage a diversity of non-market affordable housing options
ECONOMIC OPPORTUNITY	DIRECTION 3.1: Expand and diversify the town's economic base DIRECTION 3.2: Implement marketing strategies
SUPPORTIVE INFRASTRUCTURE	DIRECTION 4.5: Provide services and utilities in newly developing areas
RESPONSIBLE GOVERNANCE	DIRECTION 5.4: Working with neighbours and stakeholders DIRECTION 5.5: Regional partnerships

Reviewing the urban growth pattern identified in the MDP, the study boundary contains all four of the different areas, as indicated in Figure 9: Future Land Use from the Municipal Development Plan:

- ▶ Area of Transition
- ▶ Area of New Residential Development
- ▶ Area of Employment Land
- ▶ Area of Future Urban Development

Each of these areas have specific policies related to future land use development; those identified as having the greatest impact on future commercial and industrial development are contained in Appendix A, in addition to general land use policies that pertain to all future development. The study areas developed at the time that this report was prepared contains lands that are not designated for future highway commercial or industrial development; instead, they are designated for new residential development or are within the stability areas. Should the HDS be solely related to commercial or industrial development, it would be prudent to amend the study boundary to apply only to those areas that are designated to enable such development to focus the HDS to only applicable areas. In some cases, residential developments have already been developed in the study area. Alternatively, the MDP could be amended to reflect the desire for additional opportunities for commercial and industrial development.

▼ Figure 9: Future Land Use, adapted from the Town of Stony Plain's Municipal Development Plan



2.1.4 Area Structure Plans

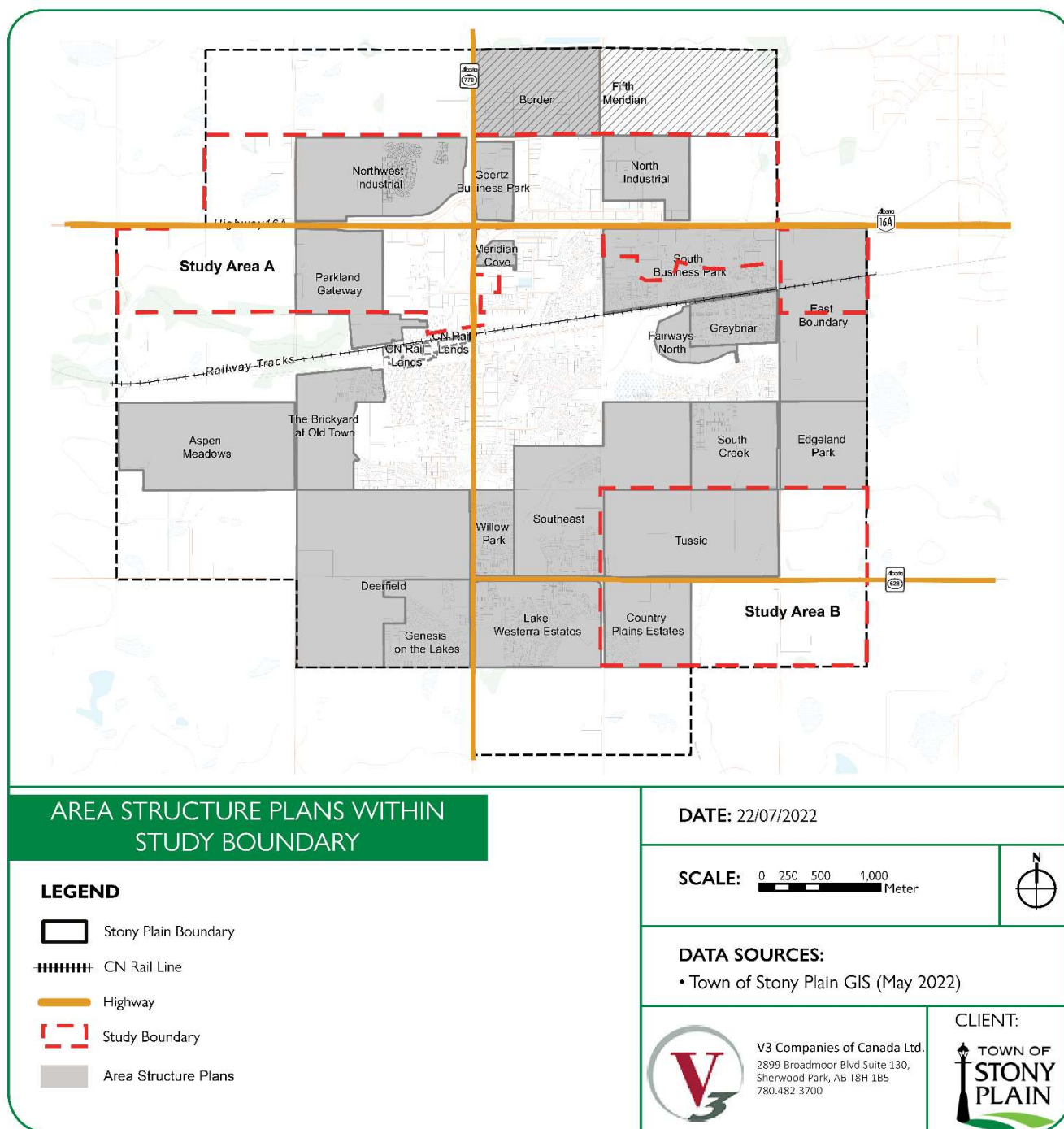
An area structure plan (ASP) is a long-range planning document that provides the framework for developing and servicing new areas of the town. They are approved as bylaws by Council and are a key component in guiding the development of the community.

ASPs refine and implement the broad planning objectives and policies of higher-order plans by promoting logical, compatible, and sustainable development. ASPs guide and direct the specific land use, subdivision, and development decisions that collectively determine the form the plan area will take. This includes making decisions on land uses, transportation systems, population and jobs, intensity, the sequence of development, and the provision of essential services and facilities. Administration from various departments work with stakeholders like community residents, business owners, landowners, and developers to create these long-range documents.

The purpose of reviewing the ASPs is to understand the overall development plan for the specific areas identified for inclusion within the HDS. If these plans do not align with the development intent of the HDS, they would need to be amended in alignment with the higher order statutory document.

The following ASPs of the town of Stony Plain pertain to areas located within the HDS boundary, as indicated in Figure 10: Relevant Area Structure Plans. These ASPs were reviewed for key findings relevant to the development of the HDS.

▼ Figure 10: Relevant Area Structure Plans



2.1.5 Land Use Bylaw

The town of Stony Plain Land Use Bylaw (2654/LUO/22) establishes rules and regulations for land development for the municipality. A land use bylaw (LUB) includes land use districts to separate residential, commercial, and industrial land development and regulate specific land uses and buildings. Each land use district has certain land uses that are permitted outright, others are conditional upon approval, and some are prohibited. Examples of land uses include a single detached dwelling (residential), a restaurant (commercial), or manufacturing (industrial).

The purpose of reviewing the LUB is to understand whether commercial and industrial uses would be permitted within the area, and if so, the applicable regulations and depth of uses that would be permitted in the various districts. In summary, this cursory review allows for the project team to have an understanding of the LUB, so that when it is time to develop the HDS, we can comment on whether or not the appropriate districts exist to facilitate the type of commercial and industrial development that is being targeted for attraction to Stony Plain, or identify potential barriers to future development (both from a regulatory perspective and from a physical perspective).

Our cursory review identified that there are three commercial and industrial districts in the LUB relevant to future commercial and industrial development within the study boundary, and a number of general provisions that will influence future development. These regulations have been transcribed in Appendix B.

2.2 Infrastructure Master Plans

2.2.1 Stormwater Management Master Plan

In 2018, Stony Plain engaged Sameng Inc to carry out a stormwater analysis and subsequent Stormwater Master Plan for the entirety of the town. This document was reviewed at a high-level to understand existing conditions and infrastructure capacities within the town, stormwater infrastructure constraints, and future considerations related to stormwater management that future development will need to address, particularly in context to the HDS project area. Additionally, given the relationship between this Master Plan and the MDP, any changes to the MDP in regard to land use designations may trigger the need for this Master Plan to be updated.

In summary, our findings were as follows:

- The study identified seven areas of having flood risk, four of which fall within the study area. These four areas are identified as the following in the Stormwater Master Plan:

▼ Table A: List of Floor Risk Areas for Improvement (Table 7-1 from the Stormwater Master Plan).

Area ID	Location	Reason For Flooding	Improvement
A	Boulder Blvd and Granite Dr.	Major drainage overflows towards depressions, especially on southwest corner of Boulder Blvd. The area has a poor major drainage system.	Improve ditch through private property
C	44 Ave. between St Andrews St. and St. Andrews Dr.	Water level increases in the creek raises water level in the sewer pipe and therefore cause ponding on the road.	Develop dry pond storage
E	41 Ave and 43 St.	A number of surface depressions causing water to pool. The area has a poor major drainage system.	Improve surface drainage towards Whispering Waters Creek
G	Golf Course Rd. N and Crystal Dr.	Not enough culvert capacity and downstream the creek.	Upgrade culvert WWC-C-100. Identify downstream creek upgrade scope.

- The Stormwater Master Plan offers specific approaches to mitigate the flood risk for 1:100-year storm events.
- There are several existing stormwater management facilities within the study area; capacities will need to be reviewed when/if new development occurs.
- Within the project boundary, there are several proposed stormwater management facilities, storm trunks, and storm channels, particularly in those areas identified through area structure plans and/or districting as areas for

future development. The Stormwater Master Plan identifies the need for future, and more micro, location specific studies to be completed to determine exact locations and capacities to accommodate 1:100-year storm events. Future development within the study area will need to ensure compliancy with the Stormwater Master Plan.

- ▶ The Stormwater Management Master Plan indicates that the town should prepare an environmental sensitive areas assessment of undeveloped lands to help refine the locations of future stormwater facilities and their integrations within existing environmentally significant areas (or wetlands). This recommendation could be advantageous and aide with future development within the Highway Development Strategy study area, as the proactive work by the town could reduce the red tape for future development in relation to approval requirements for wetland inventory and potential compensation. Dually, this could benefit future development as well by optimizing land use if stormwater management facilities are integrated with identified wetlands and/or environmentally sensitive areas.

2.2.2 Water and Sanitary Master Plan (2019)

In 2018, the town of Stony Plain engaged Associated Engineering to prepare an update to the Water and Sanitary Master Plan. The Master Plan studies the existing water and sanitary system and future demands based off of growth projections, the key items noted that will have a particular influence on development in the study area are:

- ▶ The developed areas (those subdivided and with existing urban residential, commercial, industrial, or institutional uses) within the study boundary have existing water and sanitary service.
- ▶ The plan indicates proposed water distribution and sanitary line expansion to provide services to areas not currently serviced by water and/or sanitary infrastructure, realized in 4 phases (stages 1 through 3, and the ultimate development).
- ▶ While much of the already developed areas have sufficient fire flow capacities and fire hydrant coverage, there are some noted areas within the study boundary that will require upgrades, including meeting the 50 m radius coverage for fire hydrants. It is unclear what the funding mechanism is for putting in additional fire hydrants to meet the coverage requirements.
- ▶ Future commercial and industrial development will likely have to adhere to the recommendations and long-term staging outlined in the plan, particularly related to fire flows/ safety requirements.

Additionally, given the relationship between this Master Plan and the MDP, any changes to the MDP in regard to land use designations may trigger the need for this Master Plan to be updated.

2.2.3 Transportation Master Plan

Access from Highways 16A and 628 are a critical component to attracting development to the study area. In 2020, the town of Stony Plain engaged McElhanney to prepare a Transportation Master Plan, outlining the strategic transportation investments for the next 20 years. The Transportation Master Plan recommends targeted areas for improvement and/or service expansion that, if realized, would benefit those areas within the study boundary to continue to meet adequate service levels based off forecasted growth. A key component highlighted in the Transportation Master Plan, that supports the 2020-2023 Strategic Plan, is for the town to work towards transferring the development authority for Highways 779 and 628 from the Province to the town. This is viewed as a critical component in reducing red tape for future development within the study areas adjacent to these two corridors as it reduces the number of cumbersome approvals and processes needed for development. If absorbed by the town, there is also the added benefit of being able to more strongly regulate

the urban design and landscaping components, influencing more attractive commercial and industrial development. Additionally, given the relationship between this Master Plan and the MDP, any changes to the MDP in regards to land use designations may trigger the need for this Master Plan to be updated.

2.3 Other Documents

2.3.1 Strategic Plan 2022-2025 and Corporate Plan 2022-2024

The Strategic Plan provides a framework for outlining the priorities of Council and to assist in the decision-making process. It includes the five foundations of the town of Stony Plain's planning considerations: Governance and Partners; Economic Opportunity; Supportive Infrastructure; Community Development; and Environmental Responsibility.

The Corporate Plan is the implementation document that facilitates the services, processes and capital projects identified in the Strategic Plan. It includes data that supports the progress of the town towards its goals and provides details on new strategies and initiatives that are necessary for the effective continuation and development of services provided by the town.

A summary of the key goals of the Strategic Plan and Corporate Plan relevant to the HDS is found below:

- ▶ Establish an agreement with the Government of Alberta to transfer development authority of Hwy 779 and Hwy 628 to Stony Plain
- ▶ Foster a more prosperous business climate and increase job creation
- ▶ Create more prominent marketing strategies with the business community and regional partners
- ▶ Identify opportunities for growth by monitoring key business sectors
- ▶ Contribute to and support the region to attract investment and generate new business
- ▶ Prepare a highway development strategy to support the North Business Park and highway commercial areas
- ▶ Pursue strategic investment to support economic growth and diversification
- ▶ Advocate for construction of an additional vehicle overpass across the CNR mainline

2.3.2 Economic Development Strategic Plan

The Economic Development Strategic Plan identifies four common themes for the economic development and economic future of the town of Stony Plain:

- ▶ Importance of diversifying the economy and business base;
- ▶ Support for knowledge-based economic growth;
- ▶ Importance of downtown as a destination; and
- ▶ Telling the world about Stony Plain.

The main finding of the Economic Development Strategic Plan is that there are more legitimate economic development opportunities that can be pursued than existing municipal resources allow. As such, the action plan speaks to using existing resources to attract mid-size professional, health care, and destination shopping businesses, while developing additional resources to attract large format commercial retail and services in the future.

The HDS will consider the advantages and disadvantages identified by the Economic Development Strategic Plan to create a realistic plan that targets commercial and industrial sectors that have a high probability of locating within Stony Plain. Knowing the main targets for the town's existing resources – and the goals of developing additional resources – will help to create the HDS as a targeted, realistic plan for attracting commercial and industrial investment to Stony Plain in both the immediate future and long-term.

2.3.3 Environmental Master Plan

The Environmental Master Plan (EMP) sets the direction for Stony Plain to become a leader in environmental stewardship and take actions for the benefit of future generations with the goals of establishing standards for Stony Plain to monitor and reduce environmental impacts, and support the achievements of residents, the land development industry, and the business community. The EMP builds upon the Municipal Development Plan to direct long-term planning decisions. As Stony Plain continues to grow, consideration for the environment is necessary for all aspects of planning to promote sustainable growth patterns.

The EMP identifies five areas of environmental action:

- ▶ Energy - Improve efficiency and explore renewable options
- ▶ Land - Land use planning to sustain and enhance ecosystems
- ▶ Air - Proactively reduce pollution in the atmosphere
- ▶ Water - Conserve drinking water and protect aquatic ecosystems
- ▶ Waste - Minimize waste production and associated impacts

2.3.4 Tourism Master Plan

The Tourism Master Plan targets four overarching focus areas and accompanying goals to develop a strategy to attract tourists and tourism development to the town of Stony Plain. While this plan was created with attracting business and investment from a cultural and recreational point-of-view, the key findings and outcomes of the plan can be retooled to consider the attraction and retention of commercial and industrial development. The four focus areas include:

FOCUS AREAS	GOALS
<ul style="list-style-type: none"> Organizational development 	<ul style="list-style-type: none"> Build organizational capacity to support tourism development in Stony Plain.
<ul style="list-style-type: none"> Product development 	<ul style="list-style-type: none"> Build upon existing assets to development compelling tourism experiences with broader appeal that will attract visitors to Stony Plain
<ul style="list-style-type: none"> Marketing and Promotional development 	<ul style="list-style-type: none"> Focus the destination's tourism brand and entice travelers to visit by effectively promoting experiences to receptive target markets.
<ul style="list-style-type: none"> Destination development 	<ul style="list-style-type: none"> Enhance the capacity of local businesses and tourism stakeholders to transform Stony Plain into a high performing destination that is poised for future growth.

The strategies for attracting cultural and recreational development of the Tourism Master Plan synergize with the strategies of the Economic Development Strategic Plan for attracting commercial and industrial development. Both support building organizational capacity, expanding existing assets, effective marketing to highlight the benefits of Stony Plain to target markets, and ensuring the sector is prepared for future growth. Therefore, the HDS will use the findings of the Tourism Master Plan to assist in identifying key focus areas for growth, building upon the lessons learned to jumpstart plan development and avoid duplication of work.

2.3.5 Housing Strategy

The Housing Strategy speaks to building an inclusive community that offers residents of Stony Plain a variety of housing choices to meet their needs at all stages of life. The Housing Strategy is intended to be a guiding document that describes the town's approach to meeting its housing goals and is used to inform decisions on land use and development. Key ideas within the plan include providing adequate and suitable affordable housing and working appropriately with other levels of government to access funding resources. The strategy focuses on three main goals:

- ▶ Increase the supply and diversity of affordable and supportive housing options;
- ▶ Improve access to and choice of market housing; and,
- ▶ Building partnerships, knowledge, and capacity within the community.

The Housing Strategy identifies that population growth is expected to remain strong over the long-term and the need for affordable housing will increase at a similar rate. While strong population growth is an important force for encouraging commercial and industrial development, a lack of adequate living accommodations for the accompanying employees is not. Additionally, a low vacancy rate, lack of rental unit supply and high-density housing forms, and dominance of large single

detached homes in the town indicates that independent adults may experience above-average difficulty in finding appropriate housing compared to other municipalities in the region.

The HDS will consider the effect of increased commercial and industrial development on the supply of housing in Stony Plain, especially as it relates to the ease of finding adequate and affordable accommodations for the employment force.

2.3.6 Off-site Levy Bylaw

Off-site levies can have a significant influence on growth as both a deterrent and an attraction to the commercial and industrial sectors based on how the municipality structures them and the amounts that are imposed on the development community. The Off-site Levy Bylaw (2021) sets the framework for the town to collect funds for the construction of infrastructure that is required to facilitate future growth that benefits multiple parties and/or the overall community. Having an established, transparent Off-site Levy Bylaw (including both its current form and future iterations) can be a benefit for the overall future development within Stony Plain as it clearly indicates the financial contribution a developer will have to make, which is an influencing factor when considering future investments.

Where they become beneficial to encouraging development is when the municipality fronts key infrastructure needed for a wider area of development and creates an off-site levy to recapture the costs. The levy is updated every year to adjust for changes in costs and as development moves forward the town reclaims the costs related to the investment.

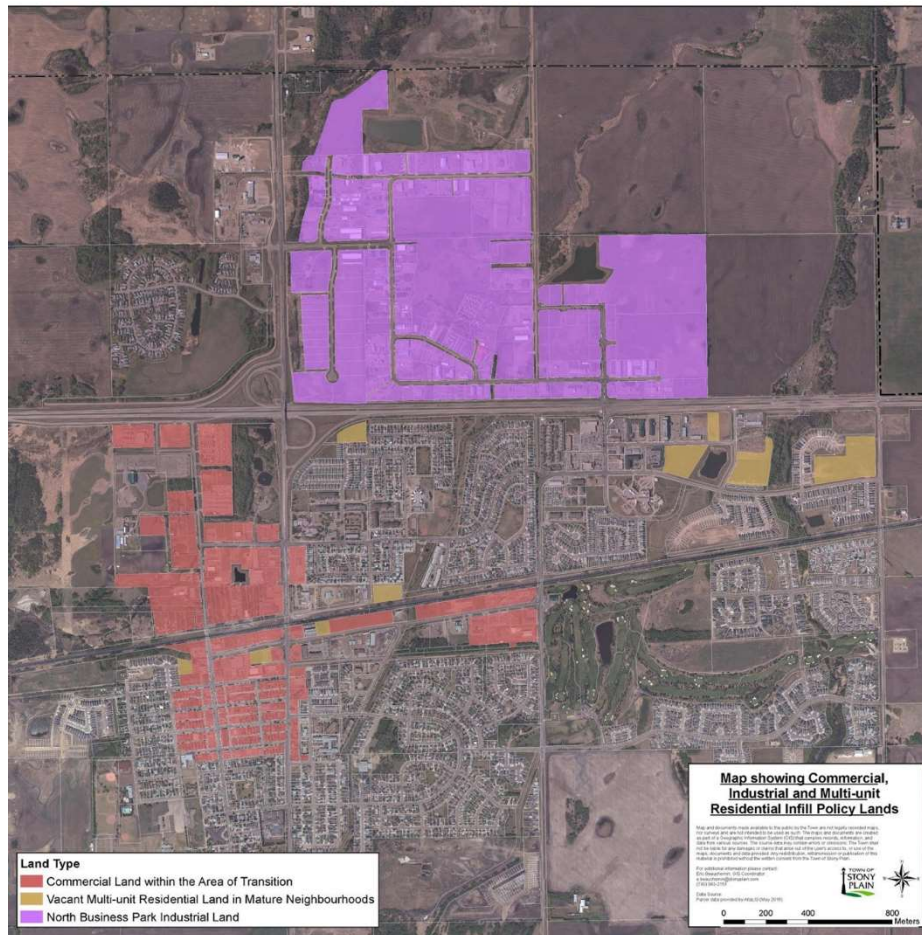
2.3.7 Infill Incentive Policy

The town of Stony Plain adopted an Infill Incentive Policy C-CAO-052 in August 16 2021 with the purpose of encouraging development investments within the commercial, industrial and multi-residential areas within the town. In the context of evaluating incentives this was reviewed and the following comments provided. These incentives included:

- ▶ Rebate of development permit fee;
- ▶ Considering adjustments to parking requirements;
- ▶ Considering variance to setback requirements;
- ▶ Considering alteration to servicing requirements; and/or
- ▶ Expediate consulting and processing times with clients.

The areas subject to this policy are identified in the following image:

▼ Figure 11: Town of Stony Plain Infill Policy Lands (Source: Schedule A, Infill Incentive Policy, Town of Stony Plain)



While there is good intent behind the policy, the initiative is very small to result in any major investment in the designated areas and raises more questions than providing actual incentives. For example, reference to parking and setback requirements is effectively a standard variance application process enabled under Section 1.2.4 of the town's Land Use Bylaw and should be assessed on what, if any, impact is generated. If there is no impact, or the impact is insignificant, it should be approved. As a result, the question then becomes as to whether the current land use bylaw regulations are warranted and should be changed overall. Similarly with servicing requirements, if altered why would it not apply to all other forms of development. Expediting the processing time for permits does contribute as an incentive, but there is no commitment of what the expedited timeframe would be. The rebate incentive may be attractive to a small to mid-size developer or for developments on existing sites where expansions are sought, however, for a larger investor it is unlikely the this would be viewed as a significant incentive. Creating incentives needs to be looked at in context to all other initiatives provided by the town to support an ecosystem of investment attraction.

2.4 Urban Design and Landscaping Standards

As part of the Highway Development Strategy, it is important to identify and understand the opportunities and risks for developing and implementing Urban Design and Landscaping Standards. Urban design relates to the physical space and design between the exterior of buildings and their interface with both the private and public realms. When approached appropriately, Urban Design and Landscaping Standards contribute to an attractive built-environment supported by the development community; when approached inappropriately they can result in unnecessary red-tape that does not ultimately support development. There are a range of design principles and elements associated with Urban Design and Landscape Standards which include:

Universal Accessibility principle relates to design in both the public and private realm that enables people with mobility challenges, such as the elderly, visually impaired, those who use mobility devices, etc. to access and enjoy a place, product or service, and to do so freely and independently. The principles of universal accessibility result in guiding what a sidewalk width is, the gradient of a ramp, and the implementation of various controls to assist a range of people with mobility challenges. In context to highway commercial and industrial development, the key is to provide a functional trail network with adequate width and placement between the public and private realm that incorporates universal accessibility design elements. Slowly these design elements are becoming more common within highway commercial developments but a less likely to be incorporated into industrial developments.

Active Transportation is creating a safe transportation network that promotes healthy modes of transportation, such as cycling, canoeing, roller blading, walking, running etc. Similar to universal accessibility, adopting an active transportation approach into urban design has an impact on the allocation of right of way space and its integration with private lands. For example, instead of a typical 1.8 m sidewalk you may look to install a minimum 3.0m – 4.0m shared use path. In addition, the location of a such a trail network needs to be at least 2 m away from a main road in order to attract users (this is known as the stress factor). Other forms of design can vary from creating a shared use path to providing designated bike trails that are separated by landscaping or physical barriers through to simple concepts of painted lines on the road defining the bicycle space. Each design form has an impact on the usage of patrons and cost.

Crime Prevention Through Environmental Design (CPTED) is based on designing public spaces that create clear visibility and reduce confined spaces while creating an attractive environment that attracts people where clear natural surveillance is provided to discourage crime. Design elements include careful placement and planting of landscape elements to limit their height or in the case of trees pruning to remove the lower canopy to enable visual surveillance. The use of lighting is also an important element to both welcome people into public spaces through creating clear visibility in dark areas. Camera surveillance is also often incorporated into the design to provide greater security or the installation of emergency booths.

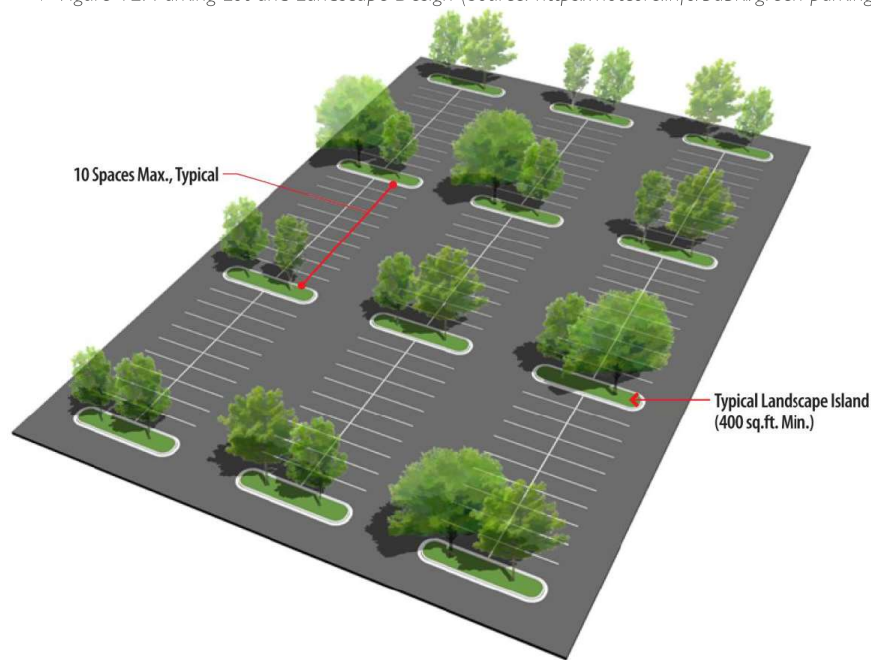
Dark Skies Certified is a growing trend within communities who seek to reduce light pollution that can impact migratory birds while also lose visual sight of the natural planetary system. Achieving this requires avoiding light directed towards the sky and installing light standards that are dark skies certified.

Building Architectural Standards are often used in communities that are tourist orientated, trying to attract tourists and creating an enjoyable community where people want to live, work and play. Architectural standards related to highway commercial development can be challenging to implement for the reasons outlined in the challenges below and are often very limiting on their requirements. Typically, the regulations will require any utility equipment located on the roof of a

building to be screened and to ensure the elevation of the building has some degree of variation versus being a large blank wall with only an entrance. This is often achieved through using different paneling, colour or other design elements to avoid creating a blank canvas frontage. In relation to industrial development, it is very rare to see the implementation of architectural standards unless it is part of a light industrial business park.

Landscaping Standards are more common within highway commercial developments where they seek to require landscaping along the frontages of the road and within islands used to disperse among the parking areas. Typical regulations used for breaking up the parking spaces is the requirement for a landscape island for every twenty parking spaces. Where enabled, the islands and swales are often being used for Low Impact Design to assist with stormwater management vs more traditional engineering design elements. See example below.

▼ Figure 12: Parking Lot and Landscape Design (Source: <https://hotcore.info/babki/green-parking-lot-landscape-design.htm>)



Access Standards relate to managing vehicular access from a property on to a road to avoid adversely affecting the flow of traffic. Highway commercial or industrial development has historically not imposed regulations or planned access appropriately. This has often resulted in creating traffic congestion and greater risks of accidents (e.g. Yellow Head or Calgary Trail). Today, most municipalities that enable development along a highway or arterial and collector roads to develop an access management plan to avoid disrupting the functional movement of traffic and reducing potential conflict points. The management of access is often established through policy and road layout or in the development of an Area Structure Plan, Neighborhood Area Structure Plan, Area Redevelopment Plan or other such planning documents. Should there also be a focus on providing pedestrian or a shared use path for multiple forms of transportation should also be considered through the planning process and how it may integrate with the road network. This may result in needing to also update the town's General Municipal Design Standards.

2.4.1 Economic Challenges with Landscaping and Urban Design Standards

Outlined above is a high-level description and breakdown of the elements associated with Urban Design and Landscaping Standards. Like most municipal authorities there are many challenges associated with implementing them within highway commercial and industrial developments. A key aspect relates to cost, both capital and operational, and the land area often needed to incorporate such design elements. Further, these two economic sectors are viewed as being car orientated developments compared to a town's core. It comes down to how significant the desire is to attract development into the community and how do you compare with other municipalities. In relation to the town of Stony Plain and Highway 16A, the Town effectively adjoins the City of Spruce Grove that has established a strong corridor of highway commercial that sets the precedent for the urban form. Therefore, it is important to look at the regulations they impose on the development along the corridor to stay competitive.

In reviewing the City of Spruce Grove, they do require non-residential buildings (Section 30 Land Use Bylaw) that are greater than 25 m in length to incorporate elements to reduce the mass which may include:

- ▶ Multiple colours,
- ▶ Differing, but complementary finishes and textures,
- ▶ Landscaping
- ▶ Recessing proportions of the visible Frontage,
- ▶ Awnings and
- ▶ Varying roof lines.

They also require all mechanical equipment to be screened in a manner compatible with the architectural character of the building. Landscape plans are also required to be prepared by a registered landscape architect that generally covers landscaping within the setbacks. However, where twenty-five or more parking stalls are provided landscape islands are to also be incorporated. It is noted that the city may require additional landscaping requirements than those set out in their Land Use Bylaw for sites that abut Highway 16A or 16. These types of design standards, as reference earlier, are typical, however, they do not truly meet full requirements of Urban Design and Landscape Standards referenced above.

In relation to attracting Industrial development, the town should be comparing itself to the regulations imposed in places such as the Acheson Industrial Park. In this context the architectural regulations are very broad and subjective (Section 11.2 Land Use Bylaw) with a main focus on durability of material and screening projections such as mechanical and electrical equipment. Landscape plans may be required in both industrial or commercial developments (Section 13.1-13.3 Land Use Bylaw) and are fairly standardized.

Based on both commercial and industrial development providing a significant tax input into a municipality there is less pressure to impose either landscaping or urban design standards. It is our recommendation that any such standards imposed should be guided by those who you are competing to attract business – the city of Spruce Grove and Parkland County. It is a fine balance between the costs and community needs and exceeding the design standards of your neighbouring municipalities may deter attracting development.

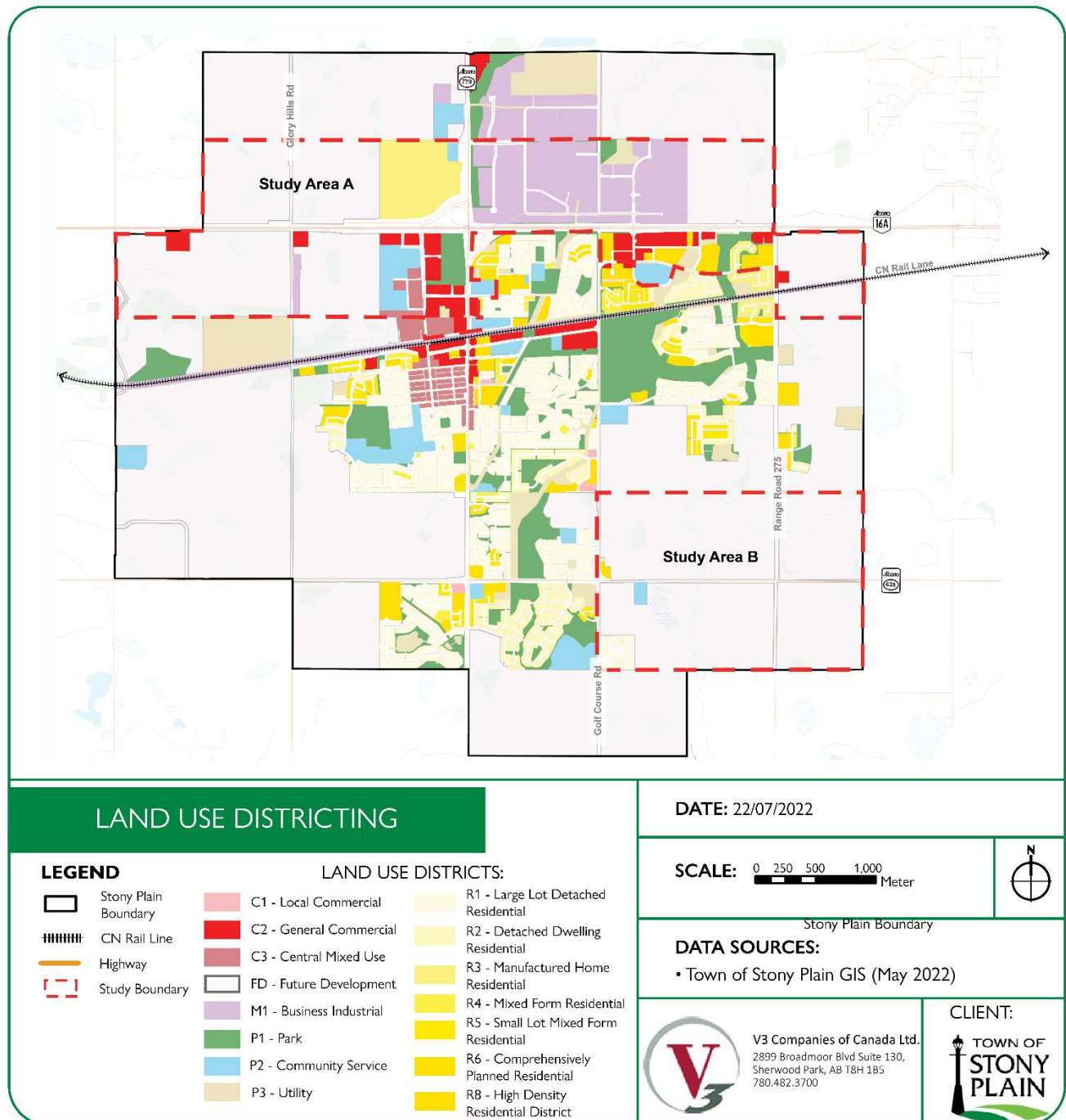
3 DEVELOPMENT PATTERNS AND TAXATION

A SPATIAL ANALYSIS

A series of mapping studies were completed to better understand development patterns within and around the town of Stony Plain. The purpose of this study is to understand the spatial distribution of land uses, both current and future, community infrastructure, and to visually represent the geographic distribution of tax allocation within the town. As several maps were created, only those that yielded the most applicable information to the HDS are summarized in this section; the remainder of the maps are located in Appendix D.

3.1 Existing Land Uses

▼ Figure 13: Land Use Districting map

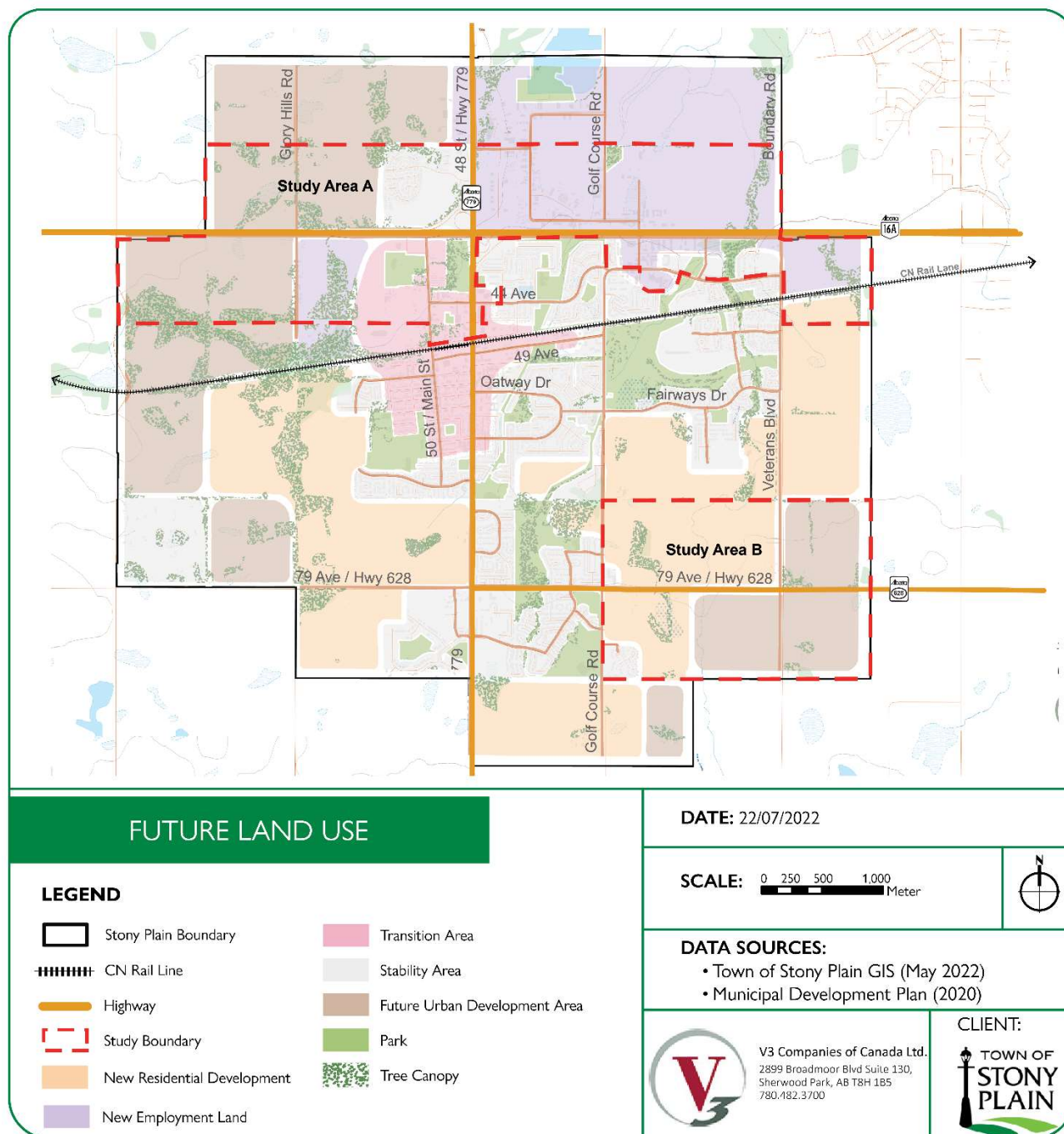


Key Findings

- ▶ There are fifteen (15) active land use districts in Stony Plain; an additional district, R7 – Multi-Unit Building Residential District, does not currently apply to any parcel, totaling sixteen 16 land use districts
- ▶ Three (3) land use districts pertain to commercial uses; one (1) land use district pertains to industrial uses
- ▶ Industrial uses are found almost exclusively north of Hwy 16A and east of Hwy 779; other industrial locations include a few parcels in the west along Glory Hills Rd and the entire extent of the CNR mainline
- ▶ Mixed-use commercial dominates in the downtown area; local and general commercial uses are found north of the downtown area, in proximity to the CNR mainline, and adjacent to Hwy 16A
- ▶ Low-density residential or park uses dominate developed land in the south of the town; medium and high-density residential uses are found sporadically with higher concentrations in proximity to Hwy 16A

3.2 Future Land Uses

▼ Figure 14: Future Land Use map

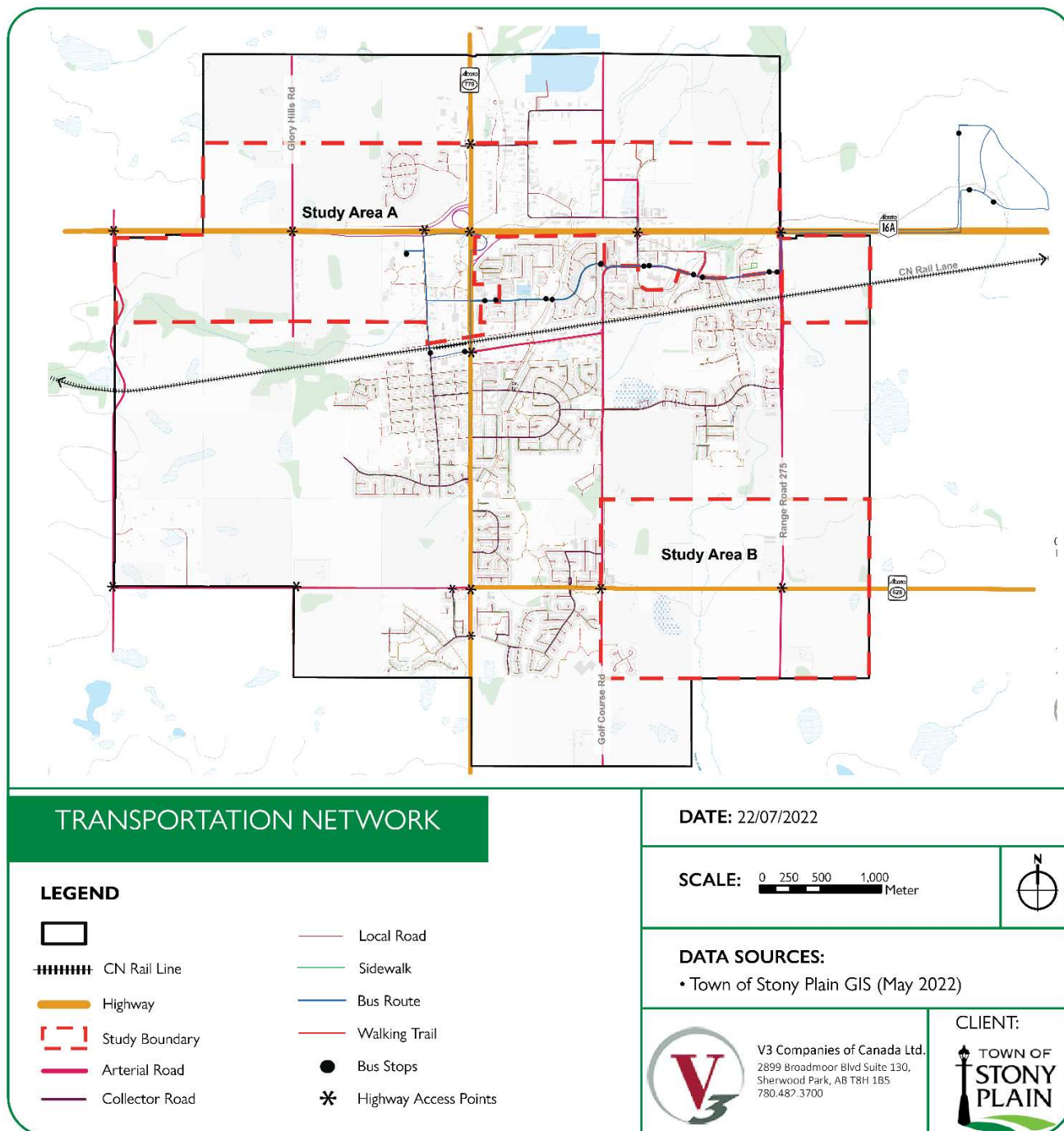


KEY FINDINGS

- ▶ Future land uses align closely with established development patterns within the town
- ▶ New employment lands are found exclusively north of the CNR mainline and in close proximity to Hwy 16A; the majority of these lands are located in the northeast adjacent to the bulk of the existing industrial development, while a new employment land area is identified to the west of the downtown along Hwy 16A
- ▶ Transition areas are identified for locations including – and in close proximity to – the existing downtown
- ▶ New residential development areas are found exclusively south of the CNR mainline and in close proximity to stability areas
- ▶ Future urban development areas are located in the northwest, west, and southeast of the town, adjacent to the current municipal limits of the town

3.3 Transportation Infrastructure

▼ Figure 15: Transportation Network map



KEY FINDINGS

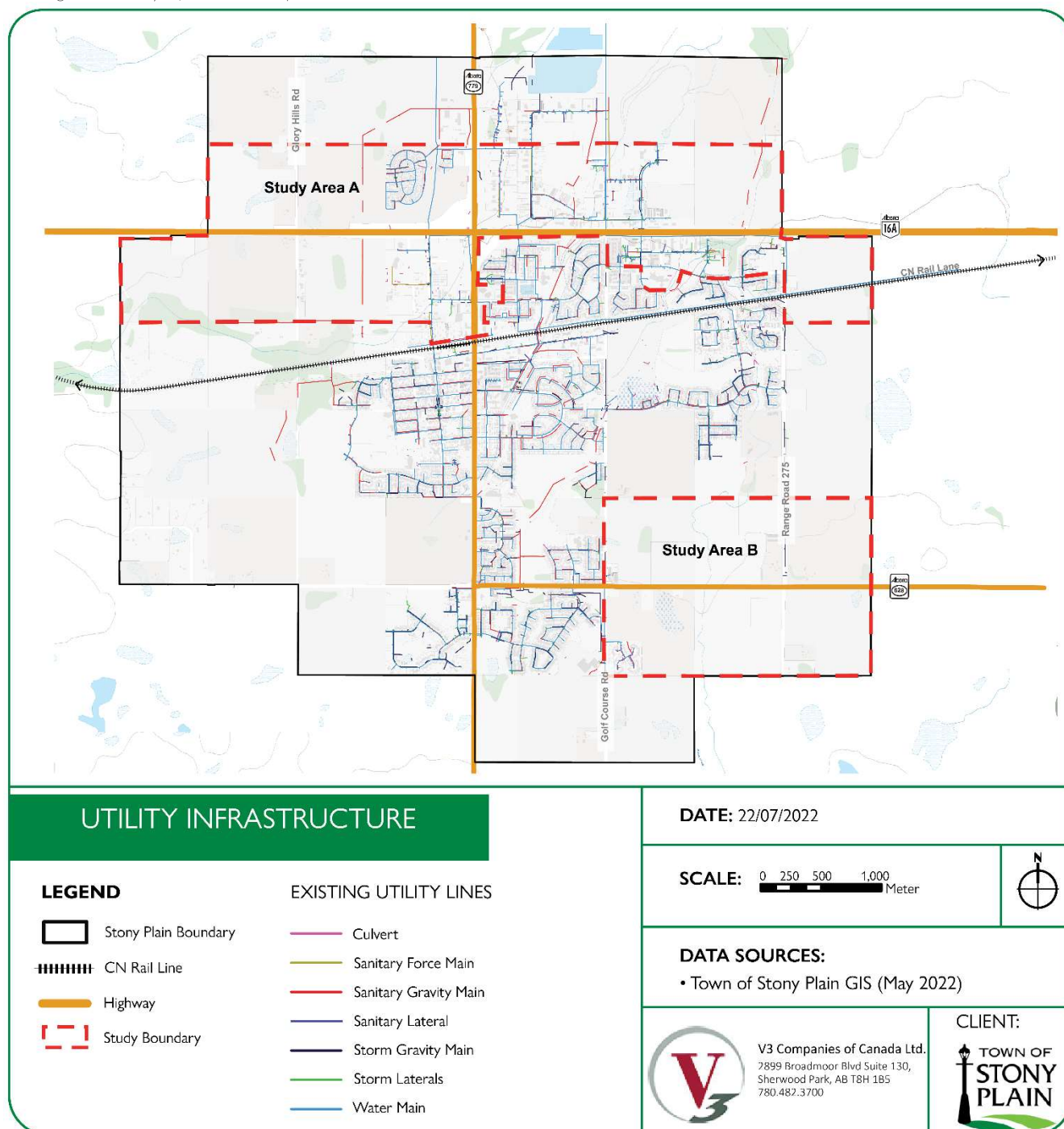
- ▶ There are six (6) access points from an existing road on to Hwy 16A in proximity to the study boundary
- ▶ Hwy 16A is classified as a “highway” through the entire extent of the study boundary
- ▶ An interchange between Hwy 16A and Hwy 779 provides grade separation between the two highways
- ▶ Signalized intersections are found along Hwy 16A in the eastern portion of the study boundary; the speed limit along this portion between Park Dr and the eastern study boundary is 80 km/h
- ▶ Unsignalized intersections are found along Hwy 16A in the western portion of the study boundary; the speed limit along this portion between Park Drive and the western study boundary is 100 km/h
- ▶ There are two (2) access points from an existing road on to Hwy 628 in proximity to the study boundary
- ▶ Hwy 628 is classified as a “highway” as it enters the town from the east until the intersection with Hwy 779; the road continues as “arterial road” Twp Rd 524 as it leaves the town to the west
- ▶ The speed limit of Hwy 628 is 80 km/h through the study area
- ▶ A bus route with associated bus stops runs through parts of the study area parallel to Hwy 16A within the developed areas of the town
- ▶ Council's Corporate Plan (2022 – 2025) identifies a key action for the town to take as being “*Establish an agreement with the Government of Alberta to transfer development authority of Highway 779 and 628 to Stony Plain*”

3.3.1 Highway 628

Highway 628 is located towards the south of the town of Stony Plain and will eventually be upgraded with the future development of Whitemud Drive west that will expose more traffic travelling through the town. This eventually presents an opportunity for three quarter sections within the defined boundary of Study Area B. The lands are currently designated as Future Urban Development Area and in reviewing the policies of the Municipal Development Plan they infer the lands will predominantly be used for residential development. Currently, the area of priority for development opportunities from the analysis completed relates to Highway 16A and the lands to the north. However, with the eventual construction of the Whitemud Drive would present opportunities for future development of commercial and possibly light industrial activities on the lands to the south of Highway 628. While these lands could eventually present a significant opportunity for highway commercial development, the nature of this development when combined with the future development along Highway 16A could have a significant impact on the commercial activities within the town's core that should be evaluated closer to the time the lands present an opportunity for development purposes.

3.4 Servicing Infrastructure

▼ Figure 16: Utility Infrastructure map

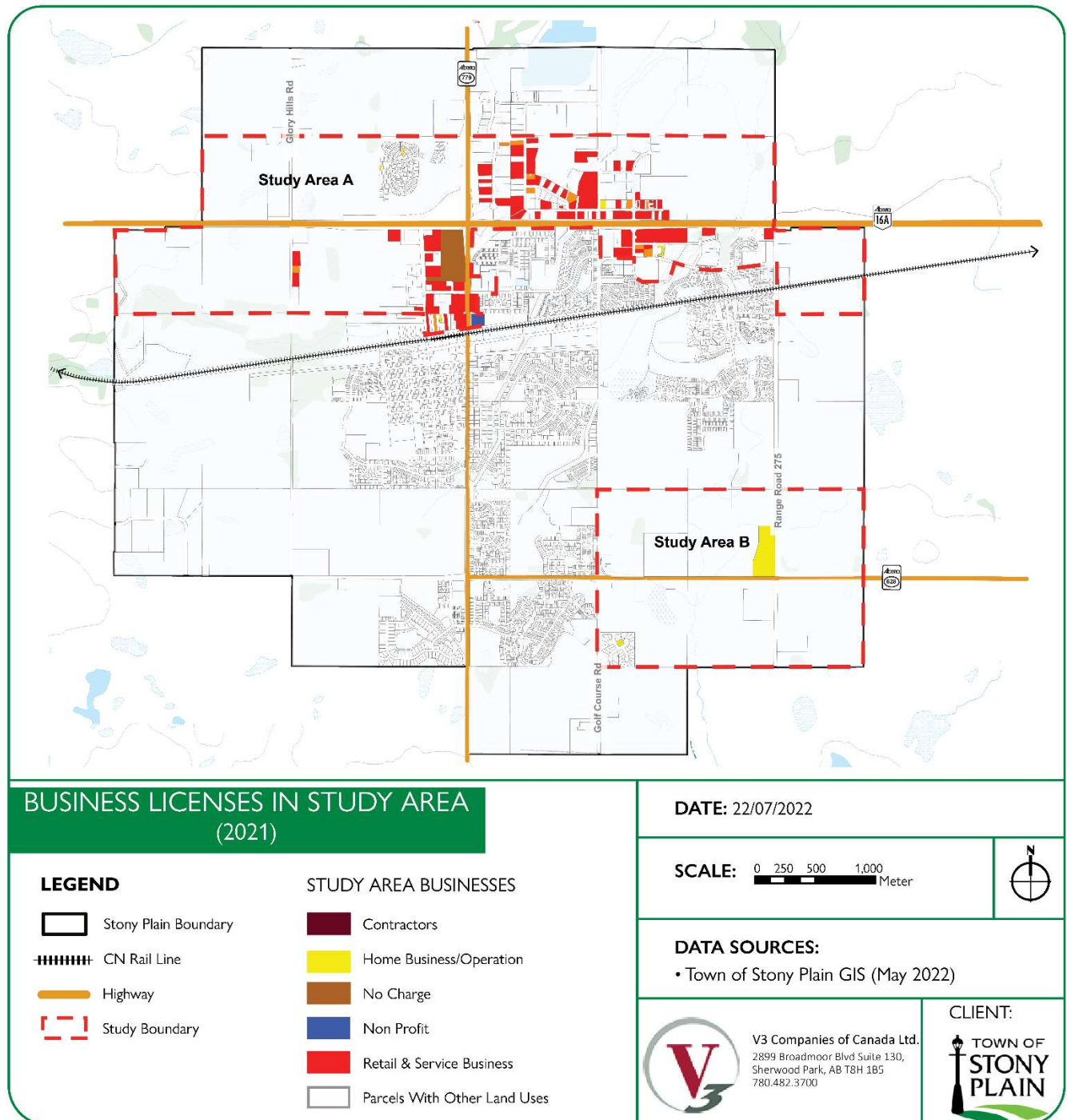


KEY FINDINGS

- ▶ Utility infrastructure is located within the study boundary only where residential, commercial, or industrial development has already occurred
- ▶ The majority of existing utility infrastructure within the study boundary is located north of Hwy 16A servicing the existing industrial development in the area
- ▶ Utility infrastructure within the study boundary exists west of Hwy 779 in proximity to Hwy 16A, but quickly ends towards the western extent of the study boundary
- ▶ Utility infrastructure is not present where development has not yet occurred along Hwy 16A at the eastern extent of the study boundary
- ▶ Parcels along Hwy 628 within the study boundary do not have any significant existing utility infrastructure

3.5 Business Licenses

▼ Figure 17: 2021 Business Licenses in Study Area (2021) map

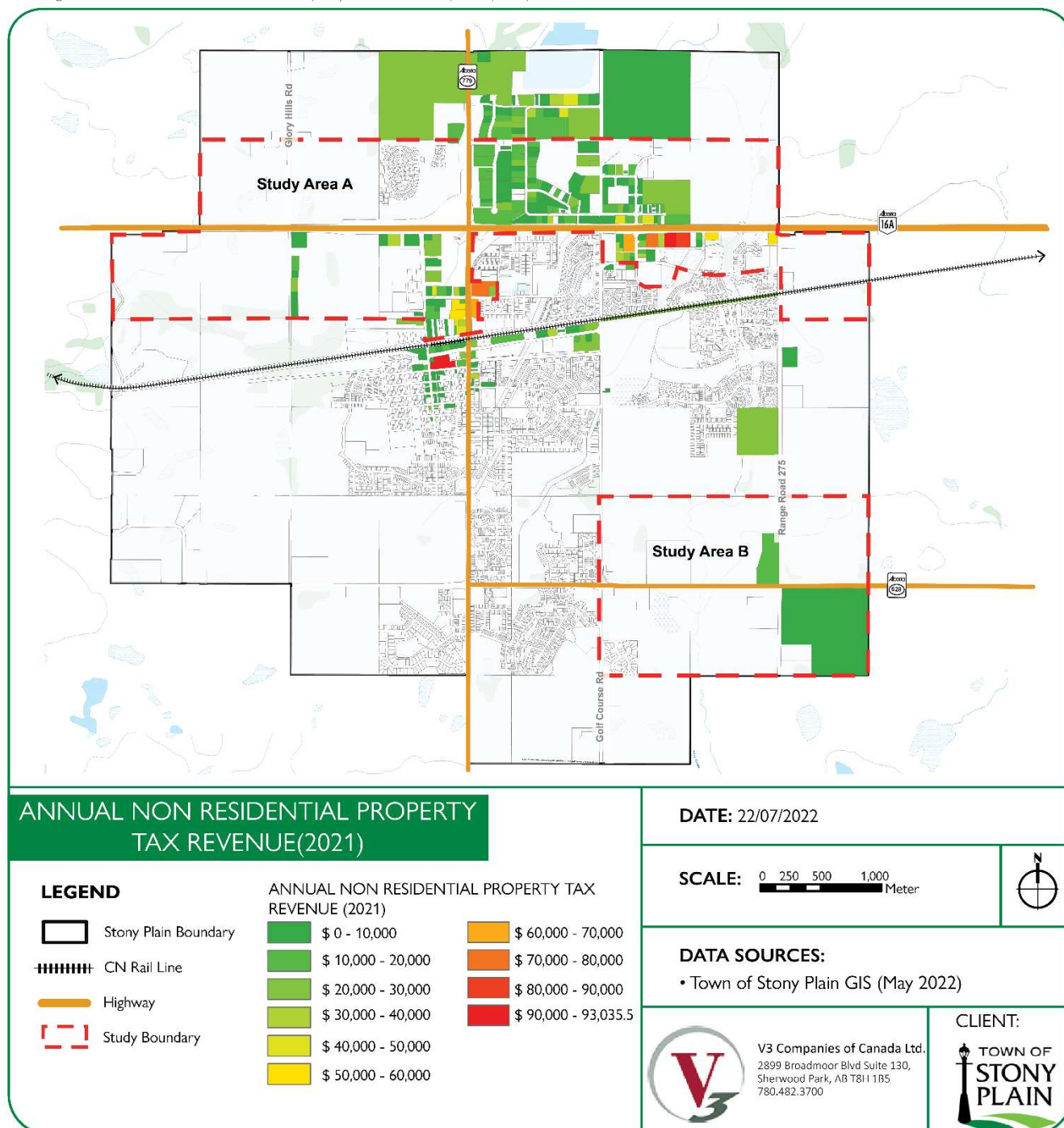


KEY FINDINGS

- ▶ Business licenses within the study area are almost exclusively found in north of the downtown and in proximity to Hwy 16A as it enters the town from the east
- ▶ A relatively small number of business licenses are found in the western extent of the study boundary adjacent to Hwy 16A along Glory Hills Rd
- ▶ Only “home business/operation” business licenses are found in proximity to Hwy 628

3.6 2021 Non-Residential Property Tax Revenue

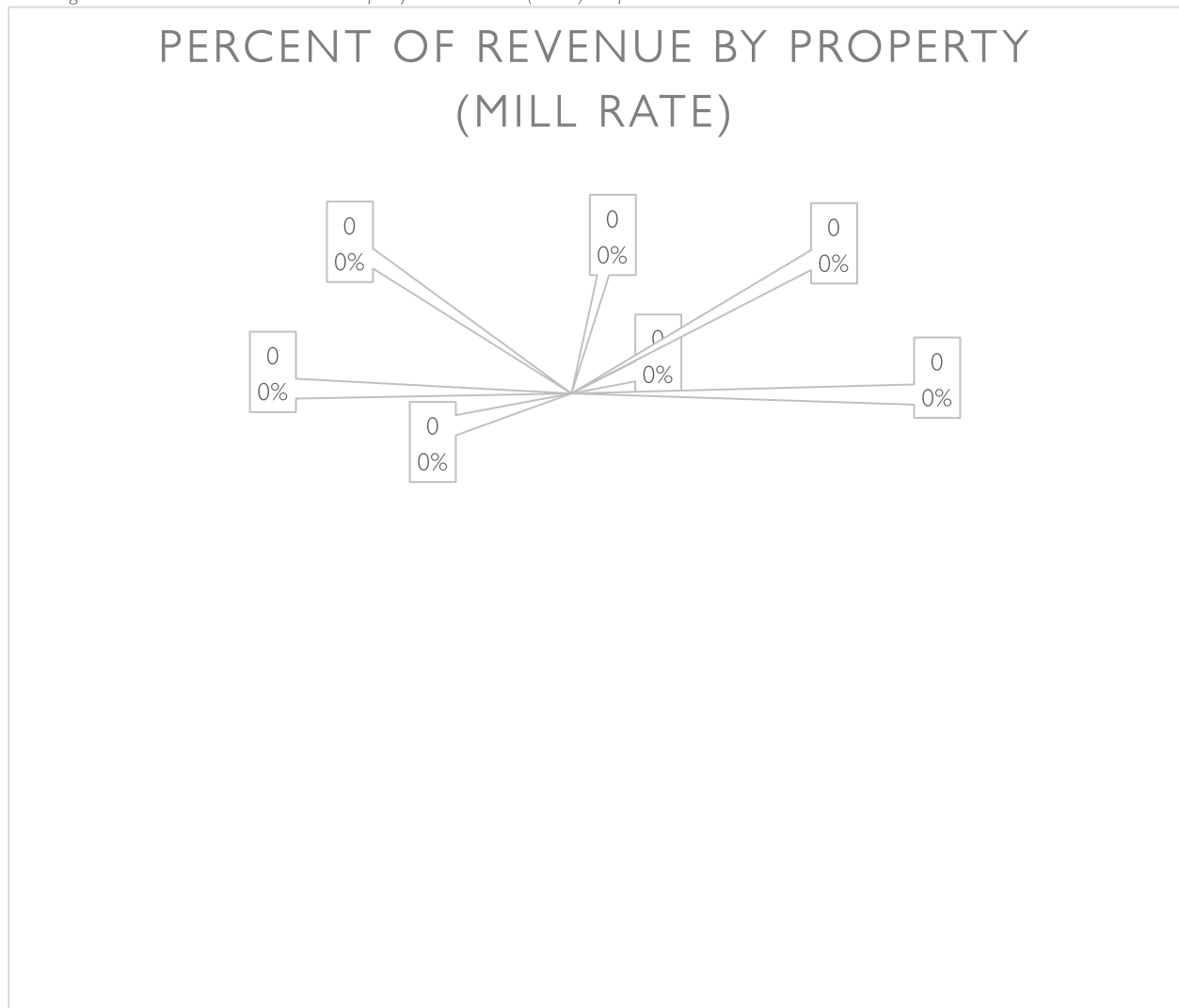
▼ Figure 18: Annual Non-Residential Property Tax Revenue (2021) map



KEY FINDINGS

- ▶ Non-residential properties paying property tax are found throughout the study boundary but are concentrated north of downtown and in close proximity to Hwy 16A
- ▶ The majority of property tax revenues within the study boundary are between \$10,000 and \$40,000 per annum
- ▶ Relatively few non-residential properties within the study boundary pay property taxes approaching \$50,000 to \$90,000 per annum, and these are concentrated north of the downtown and to the immediate south of Hwy 16A in the eastern extent of the study boundary
- ▶ Existing non-residential properties along Hwy 628 pay between \$0 and \$20,000 in property taxes per annum

▼ Figure 19: Annual Non-Residential Property Tax Revenue (2021) map



KEY FINDINGS

- ▶ 77% of the town's tax revenue is raised from its residential/farmland tax base
- ▶ 21% of the town's tax revenue is raised from its non-residential tax base
- ▶ The residential/farmland and non-residential together make 98% of the town's total tax revenue
- ▶ The remaining 2% of the town's tax revenue is raised from a combination of 2006 Annexed Properties, Machinery and Equipment, Meridian Foundation, Tri Municipal Leisure Centre, and Designated Industrial Property.

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4 ECONOMIC BASE AND RETAIL TRADE AREA

UNDERSTANDING THE BASE

4.1 Environmental Scan

4.1.1 Economic Base Analysis

4.1.1.1 Regional and Micro Economic Trends

The following illustrates the main trends observed by the regional economy, businesses, and workforce. It also highlights the state of Stony Plain and Census Division 11 and how the region and the workforce are changing.

Census Division 11 is the census division surrounding the City of Edmonton and consists of the Edmonton Metropolitan Region (EMR). This is an important geographic area from which Stony Plain can draw talent, residents, and consumers.

Economy Overview

▼ Figure 20 - Economy Overview Stony Plain & Census Division 11

Category	Value
Population (2021) – Stony Plain	17,993
Population (2021) – Census Division 11	1,522,897
Jobs (2021) – Census Division 11	680,289
Average Wages (2021) – Census Division 11	\$60,831
Education Completions (2019) – Census Division 11	18,089
Exports (2019) – Census Division 11	\$90,387,342,008
Imports (2019) – Census Division 11	\$97,871,632,302

Source: EMSI 2022 and Statistics Canada 2022

[illegible]

Regional Trends

Year	Germany (%)	France (%)	UK (%)
2001	0	0	0
2002	4	3	2
2003	7	6	4
2004	10	8	6
2005	14	12	8
2006	20	18	10
2007	27	24	13
2008	29	27	15
2009	25	23	13
2010	28	25	14
2011	32	29	16
2012	39	36	18
2013	43	40	19
2014	49	45	20
2015	48	44	21
2016	43	39	22
2017	46	40	25
2018	47	42	28
2019	48	43	30
2020	32	29	20
2021	39	34	26
2022	39	35	28
2023	40	36	29
2024	40	36	30
2025	40	37	31
2026	41	37	32
2027	41	38	33

Source: Emsi 2022

The region (Census Division 11) is recovering from the pandemic, with the number of jobs forecasted to grow over the next 5 years.

Jobs and Wages Overview

▼ Figure 23 - Overview of Jobs and Wages, Census Division 11, 2021

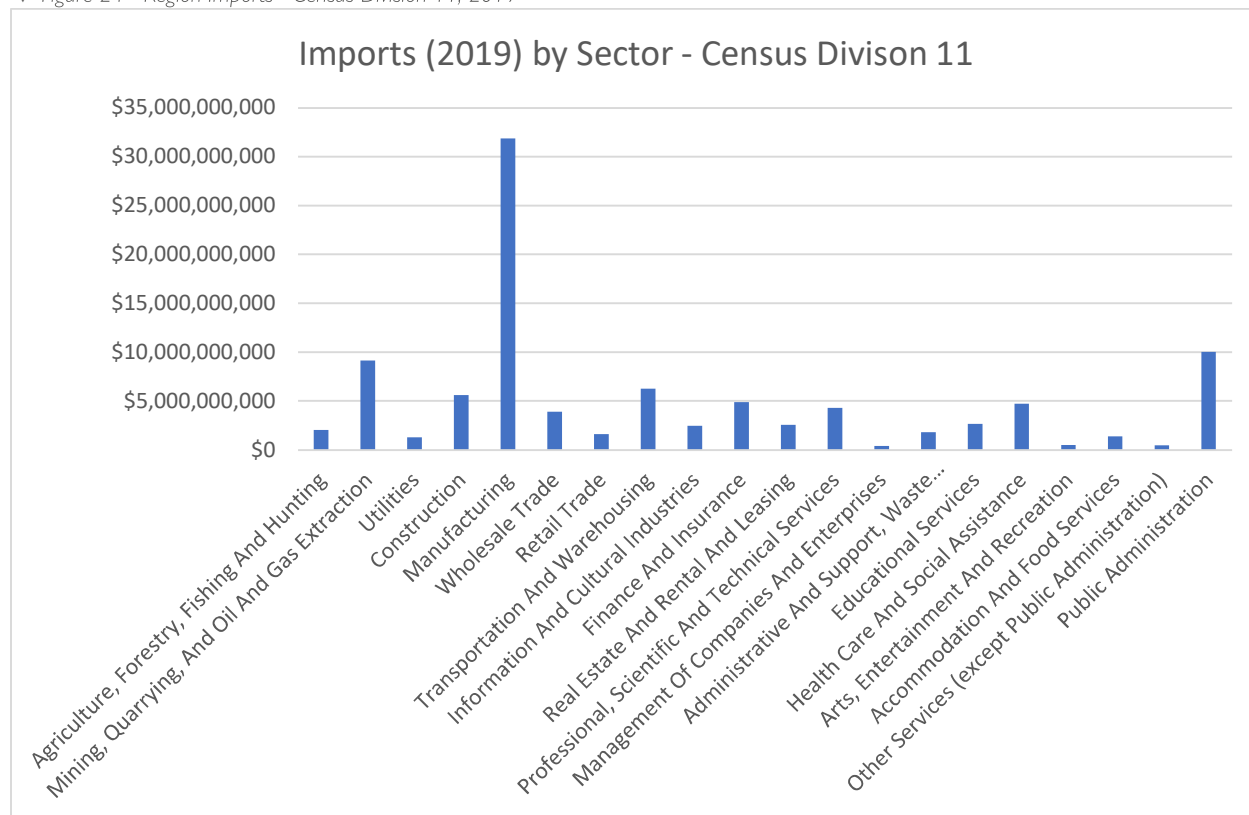


Source:
Emsi

2022

Region Imports

▼ Figure 24 - Region Imports - Census Division 11, 2019

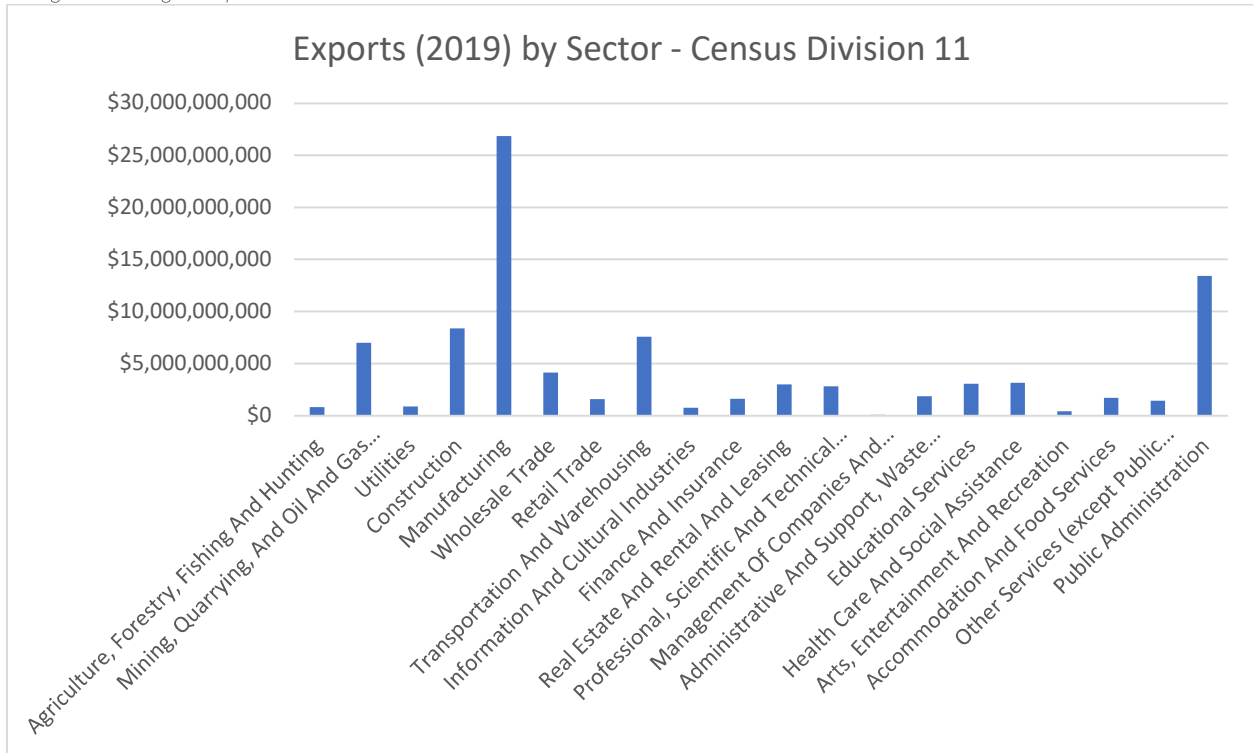


Source: Emsi 2022

The leading import in 2019 was Manufacturing, valued at \$31.8 billion. The top 5 imports were Manufacturing, Public Administration, Mining, Quarrying, Oil and Gas Extraction, Transportation and Warehousing, and Construction, with a combined value of \$62.9 billion, representing 64% of imports by value.

Region Exports

▼ Figure 25 - Region Exports - Census Division 11, 2019



Source: Emsi 2022

The leading export in 2019 was Manufacturing, valued at \$26.8 billion. The top 5 exports were Manufacturing, Public Administration, Construction, Transportation and Warehousing, and Mining, Quarrying, And Oil and Gas Extraction, with a combined value of \$63.2 billion, representing 69.9% of all exports by value.

▼ Figure 26 - Top 20 Jobs by % of Total Jobs in Industry Group

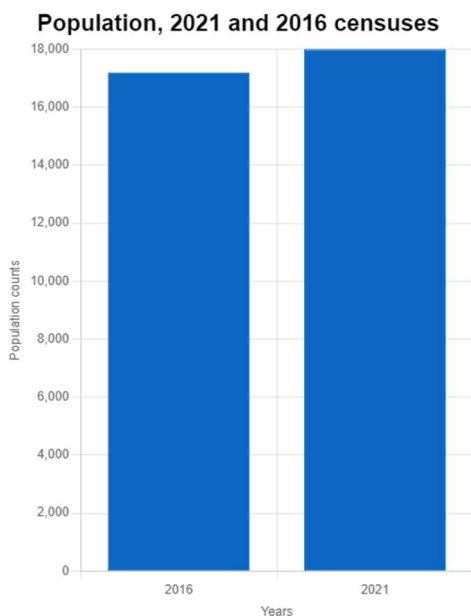
Description	Employed in Industry Group (2020)	Employed in Industry Group (2021)	% Change (2020 - 2021)	% of Total Jobs in Industry Group (2021)	Median Hourly Wages
Retail salespersons	23,151	24,834	7%	3.7%	\$16.23
Registered nurses and registered psychiatric nurses	14,861	15,694	6%	2.3%	\$45.20
Food counter attendants, kitchen helpers and related support occupations	12,849	13,263	3%	1.9%	\$15.17
Cashiers	11,498	12,091	5%	1.8%	\$14.87
Unclassified	9,820	11,370	16%	1.7%	\$0.00
Retail sales supervisors	9,119	11,108	22%	1.6%	\$22.83
Transport truck drivers	9,832	9,725	(1%)	1.4%	\$26.86
General office support workers	8,787	9,125	4%	1.3%	\$24.99
Nurse aides, orderlies and patient service associates	8,701	9,075	4%	1.3%	\$21.85
Store shelf stockers, clerks and order fillers	8,516	8,997	6%	1.3%	\$16.22
Financial auditors and accountants	8,189	8,940	9%	1.3%	\$43.77
Sales and account representatives - wholesale trade (non-technical)	8,568	8,798	3%	1.3%	\$31.36
Administrative officers	8,371	8,596	3%	1.3%	\$29.41
Secondary and elementary school teachers and educational counsellors, n.e.c.	8,198	8,525	4%	1.3%	\$39.27
Administrative assistants	7,377	7,770	5%	1.1%	\$26.01
Material handlers	7,147	7,520	5%	1.1%	\$19.97
Receptionists	7,124	7,291	2%	1.1%	\$18.80
Elementary school and kindergarten teachers	6,756	7,176	6%	1.1%	\$43.89
Shippers and receivers	6,548	6,828	4%	1.0%	\$18.92
Construction trades helpers and labourers	6,605	6,794	3%	1.0%	\$18.74

Source: Emsi 2022

The top 5 leading jobs in employment growth were, Retail sales supervisors (22%), Financial auditors and accountants (9%), Retail salespersons (7%), Elementary school and kindergarten teachers (6%), and Store shelf stockers, clerks, and order fillers (6%). Note, Unclassified jobs (occupations)¹ saw a 16% growth in employment from 2020 to 2021.

4.1.1.2 Demographics & Attributes of Stony Plain

▼ Figure 27 Population Size of Stony Plain 2016 and 2021



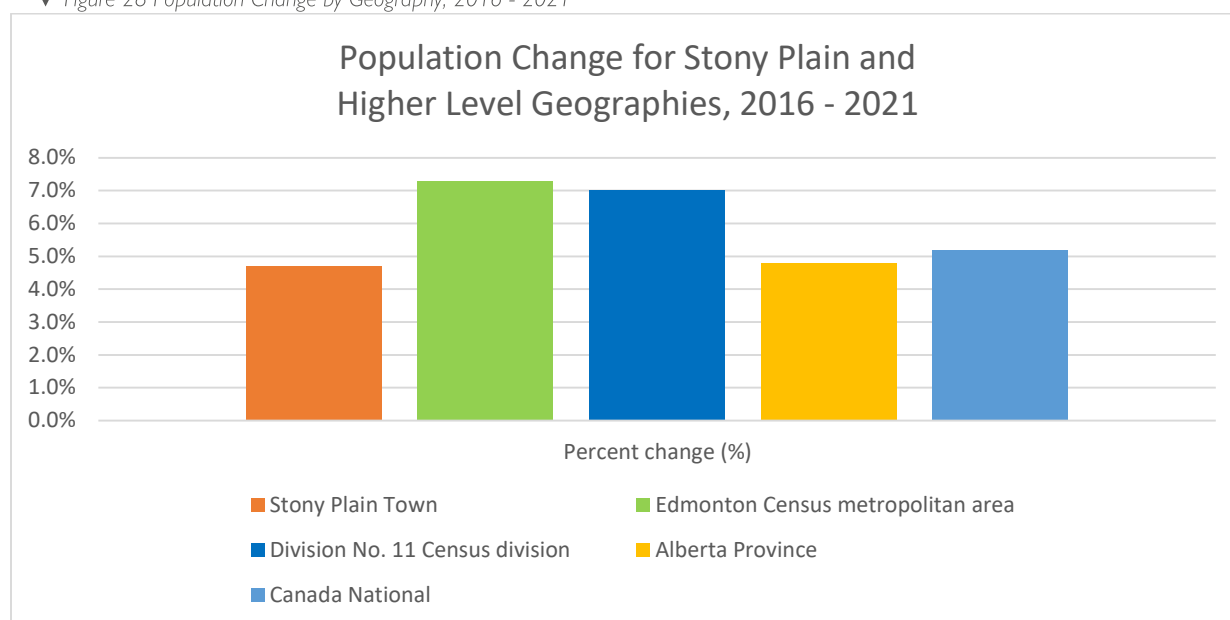
Source: Statistics Canada 2022

In 2021, the population of the town of Stony Plain was 17,993, increasing by 4.7% from 2016.

Figure 26 below compares the population growth of Stony Plain to Census Division 11, Edmonton CMA, the Province, and the nation.

¹ The Unclassified occupation (X000) is used as an occupational bucket for the Unclassified industry, which does not have a known staffing pattern. Without a staffing pattern, it's not possible to translate industry employment to occupation employment. Therefore Emsi uses an Unclassified SOC code to hold occupational information where an industry classification was not provided. (Source: EMSI 2022)

▼ Figure 28 Population Change by Geography, 2016 - 2021

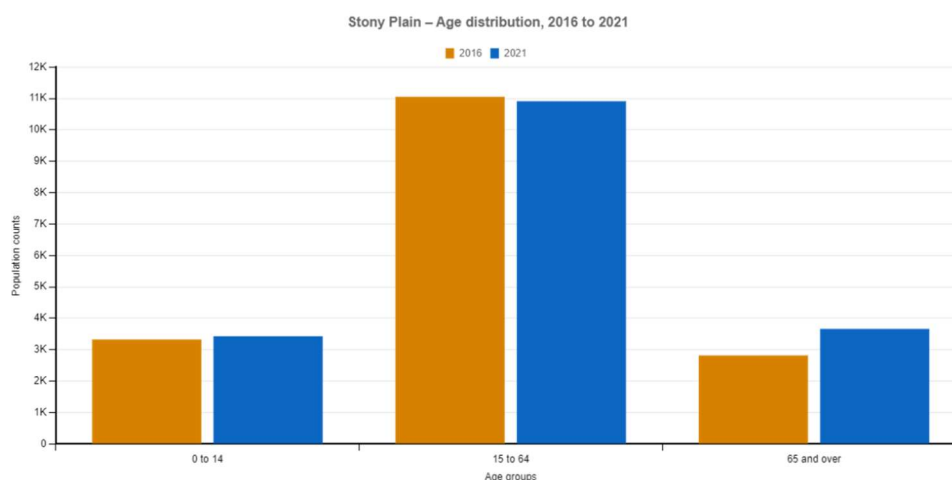


Source: Statistics Canada 2022

From 2016 to 2021, the town of Stony Plain saw much slower population growth than Edmonton CMA, 4.7% vs 7.35% respectively. However, it was relatively on par in terms of growth with the province, which grew 4.8% over the same period.

Population by Age

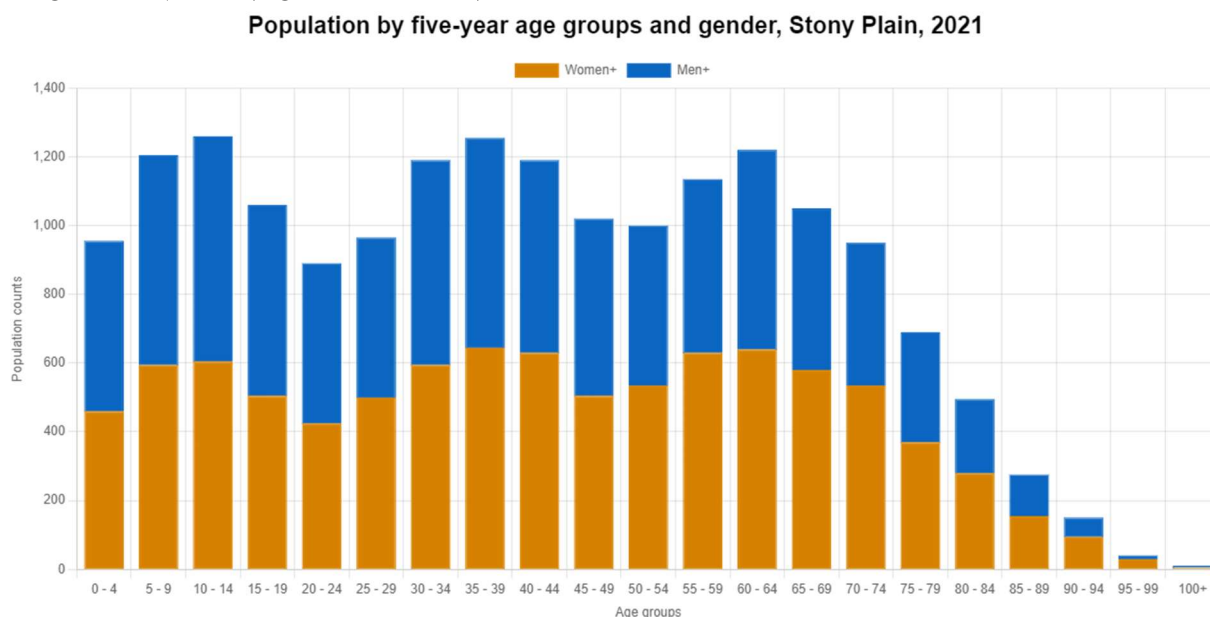
▼ Figure 29 - Population of Stony Plain by Broad Age Groups, 2016 to 2021



Source: Statistics Canada 2022

The working-age population (16 – 64) in Stony Plain represents 60% of its population, roughly 4.8% below the percentage share for the group at the national level.

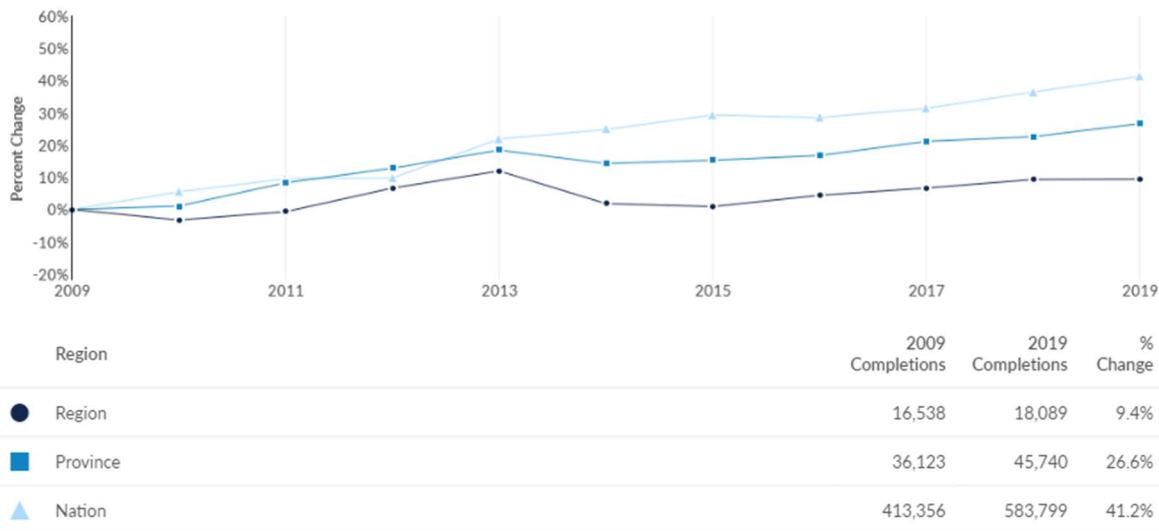
▼ Figure 30 – Population by Age and Gender in Stony Plain, 2021



Source: Statistics Canada 2022

Regional Education Completion Trends 2009 - 2019

▼ Figure 31 - Education Completion Trends for Census Division 11, Province and Nation

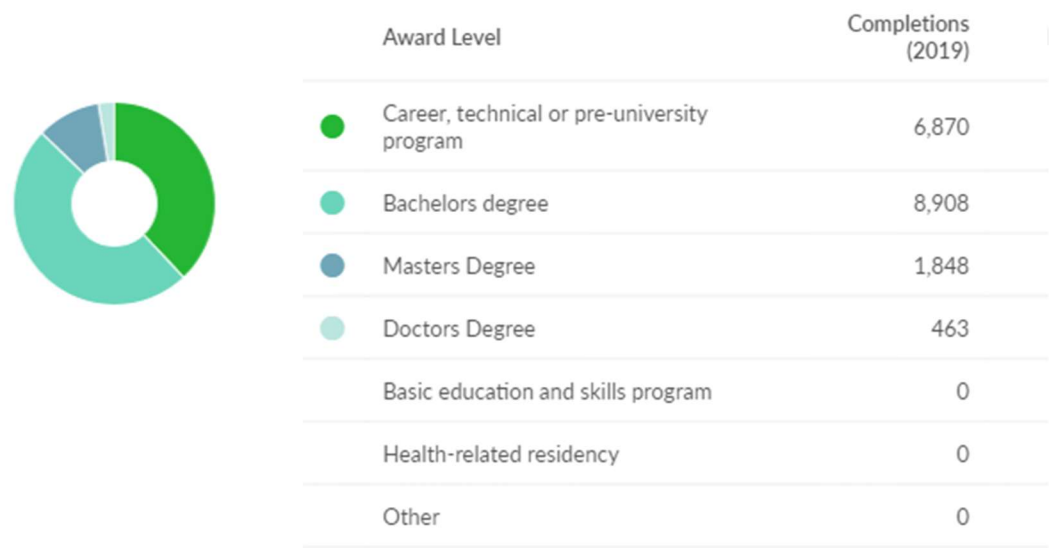


Source: Emsi 2022

Between 2009 to 2019, education completion rates in Census Division 11 increased by 9.4%. While these are growing, it is only so at nearly 1/3 the pace of the province. Regionally (Census Division 11), there is a pool of 18,089 talent with post-secondary qualifications and 2,311 holding advanced degrees.

Regional Education Completions by Award Level 2019

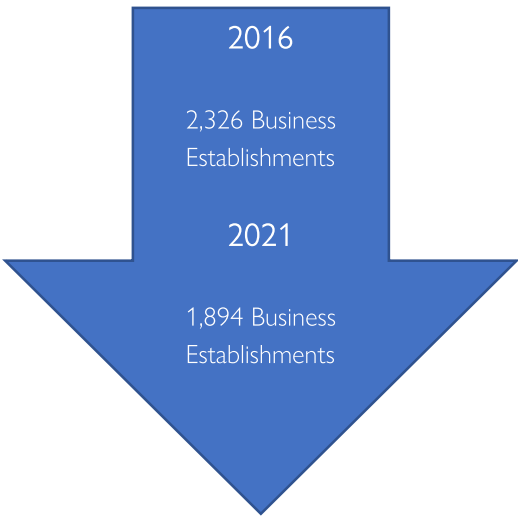
▼ Figure 32 - Education Completions by Award Level - Census Division 11, 2019



Source: Emsi 2022

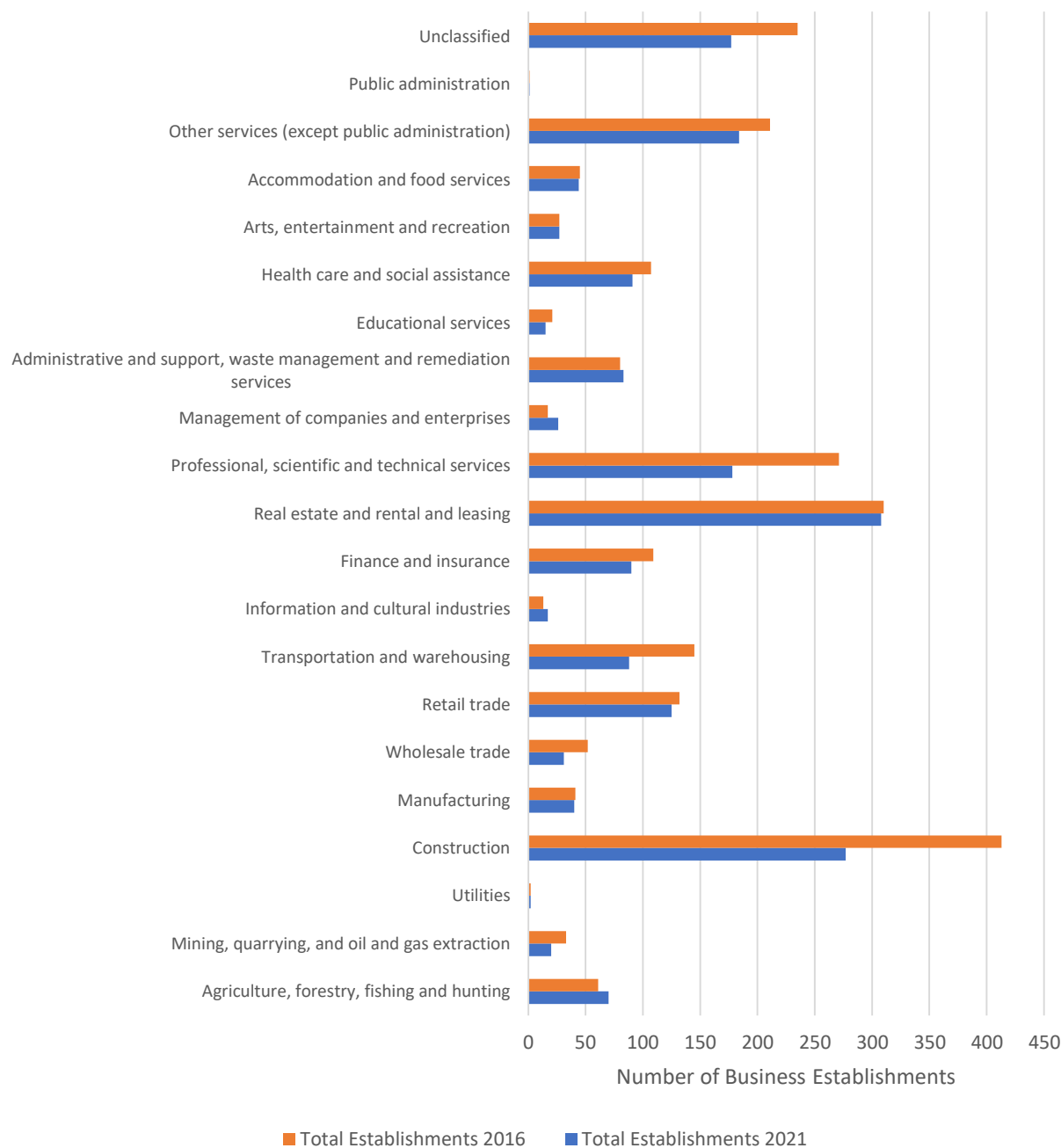
4.1.1.3 Business Activity

▼ Figure 33 - Number of Business Establishments by Sector in Stony Plain, 2021



Between 2016 and 2021, the total number of business establishments in Stony Plain declined by nearly one quarter (22.8%). The breakdown of business establishments by sector below during the same period discusses possible causes.

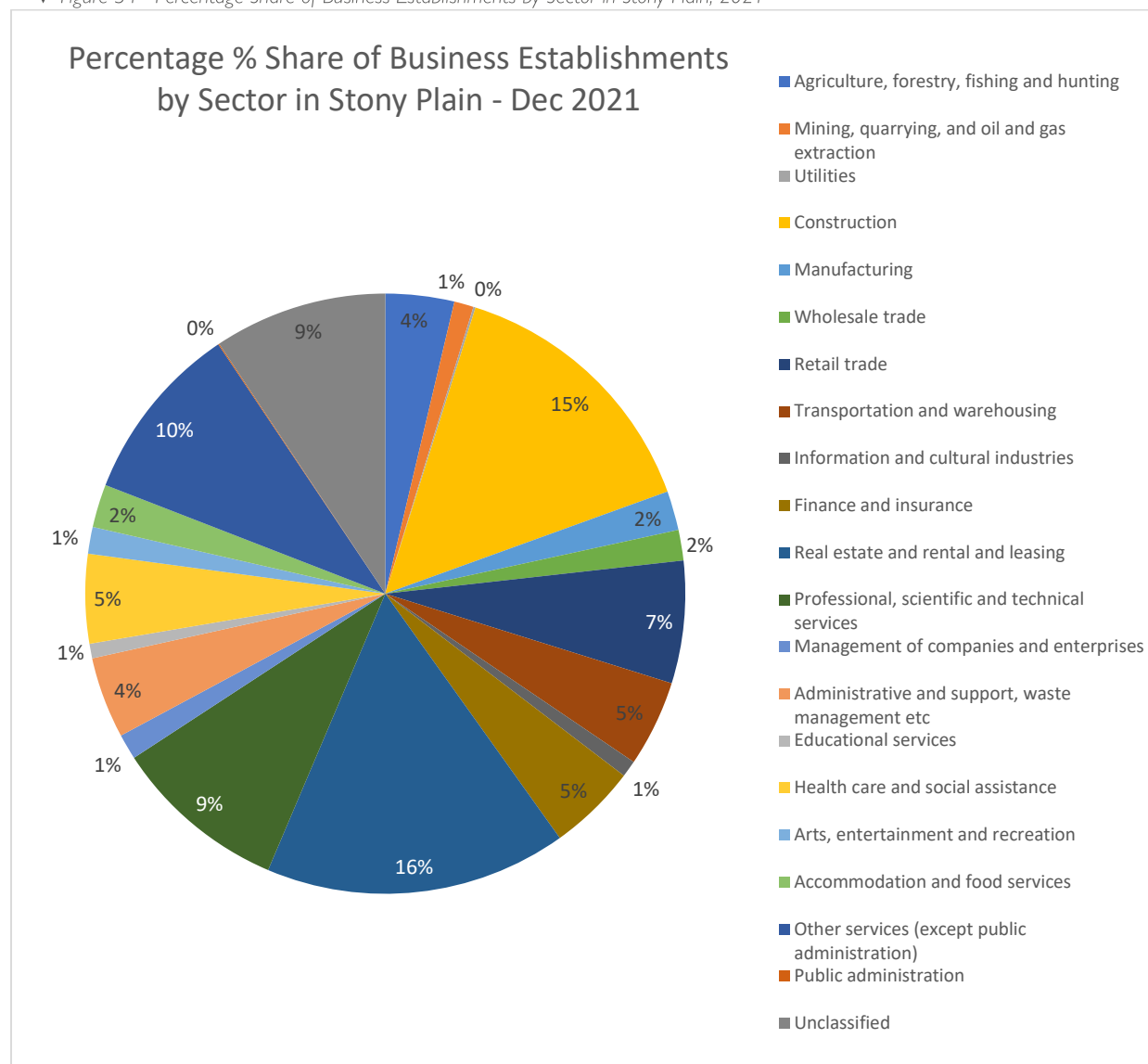
Business Establishments by Sector in Stony Plain - 2016-2021



Source: Emsi 2022

The top 5 Sectors, excluding Unclassified establishments², with the highest number of business establishments include Real estate and rental and leasing, Construction, Other services (except public administration), Professional, scientific and technical services, and Retail Trade, with 1,072 establishments in 2019 representing 57% of the business establishments in Stony Plain. Of these Construction, Professional, Scientific and Technical services, as well as Transportation and Warehousing and Unclassified, suffered the heaviest losses in establishments between 2016 and 2021. The downturn in oil and gas and the highly cyclical nature of construction are possible factors for the decline. The retail sector and accommodation and food services demonstrated robust performance with only modest declines.

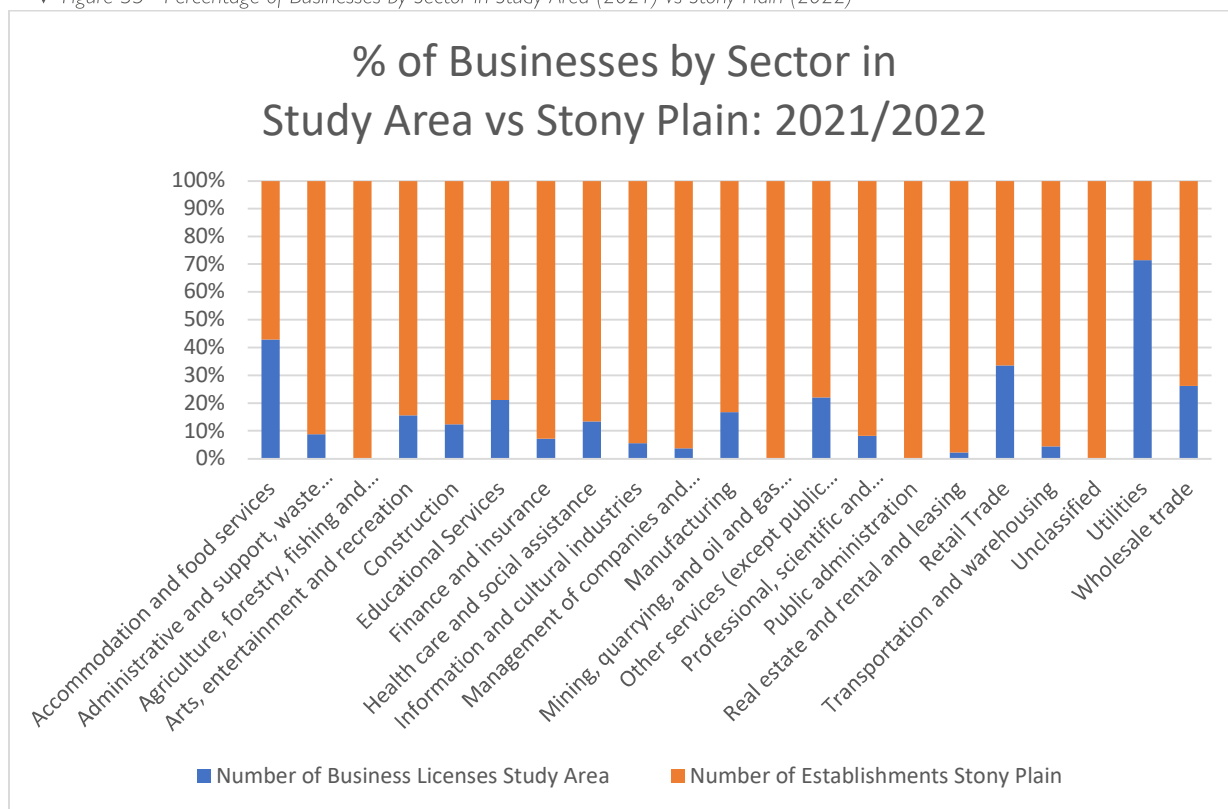
▼ Figure 34 - Percentage Share of Business Establishments by Sector in Stony Plain, 2021



Source: Emsi 2022

² Unclassified is a new category for businesses which have not received a NAICS code. (Statistics Canada, 2020)

▼ Figure 35 - Percentage of Businesses by Sector in Study Area (2021) vs Stony Plain (2022)



Source: Emsi 2022

Figure 33 above compares the percentage of business licenses with business establishments in Stony Plain to estimate the sector's relative prominence in the study area. The most significant sectors in the study area are utilities, accommodation and food services, and the retail trade. While small in number, utilities are worth noting due to their evolution with new technologies and processes.

▼ Figure 36 Composition of Business Establishments by Size, Stony Plain, 2021

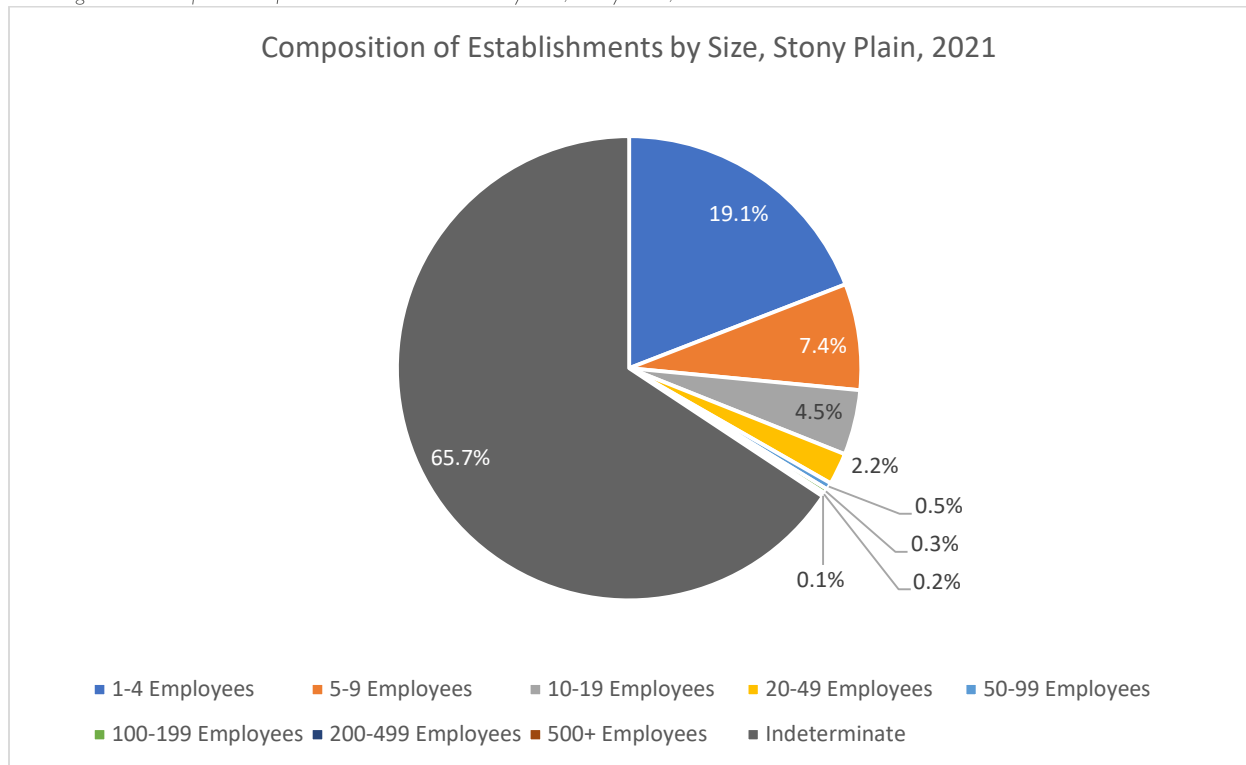


Figure 34 above shows the establishment size distribution by employment in Stony Plain. The data collection in Canadian Business Counts includes all businesses that:

- Have a minimum of \$30,000 in annual revenue; or
- Are incorporated under a federal or provincial act and have filed a federal corporate income tax form within the past three years.

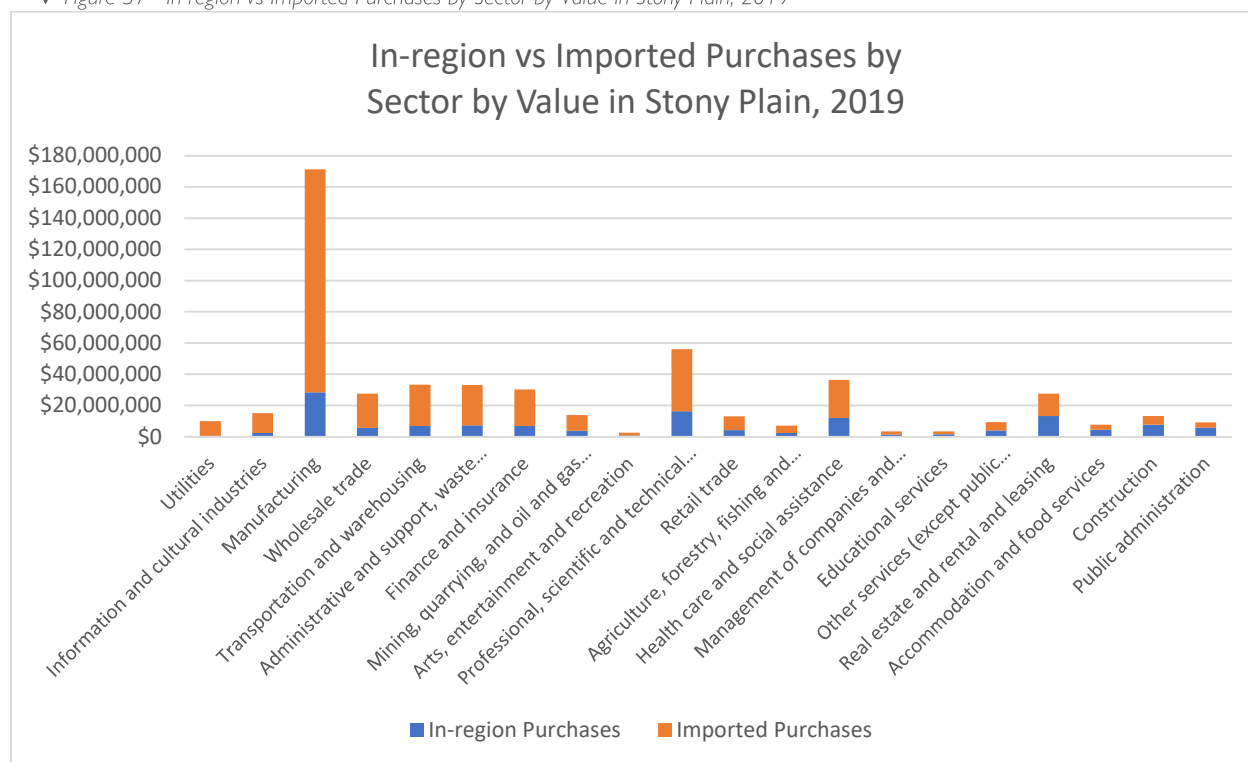
Statistics Canada defines has two categories of businesses - employer businesses and indeterminate:

- Employer businesses are defined as having an employee workforce for which they submit payroll remittances to the Canadian Revenue Agency (CRA)
- Indeterminate businesses are defined as having no employees so far as they do not submit payroll remittances to CRA. These businesses may still have a workforce of contracted workers, family members or business owners, and can include solopreneurs and gig economy workers, a growing category of workers

The importance of small businesses is demonstrated by 1,606 of the 1,894 establishments, or 85% of the businesses are indeterminate (no employees) or have 1-4 employees, followed by 5-9 employees. Very few businesses employ over 100 employees, with only 11 establishments representing 0.58% of the total.

Industry Supply Chain Activity

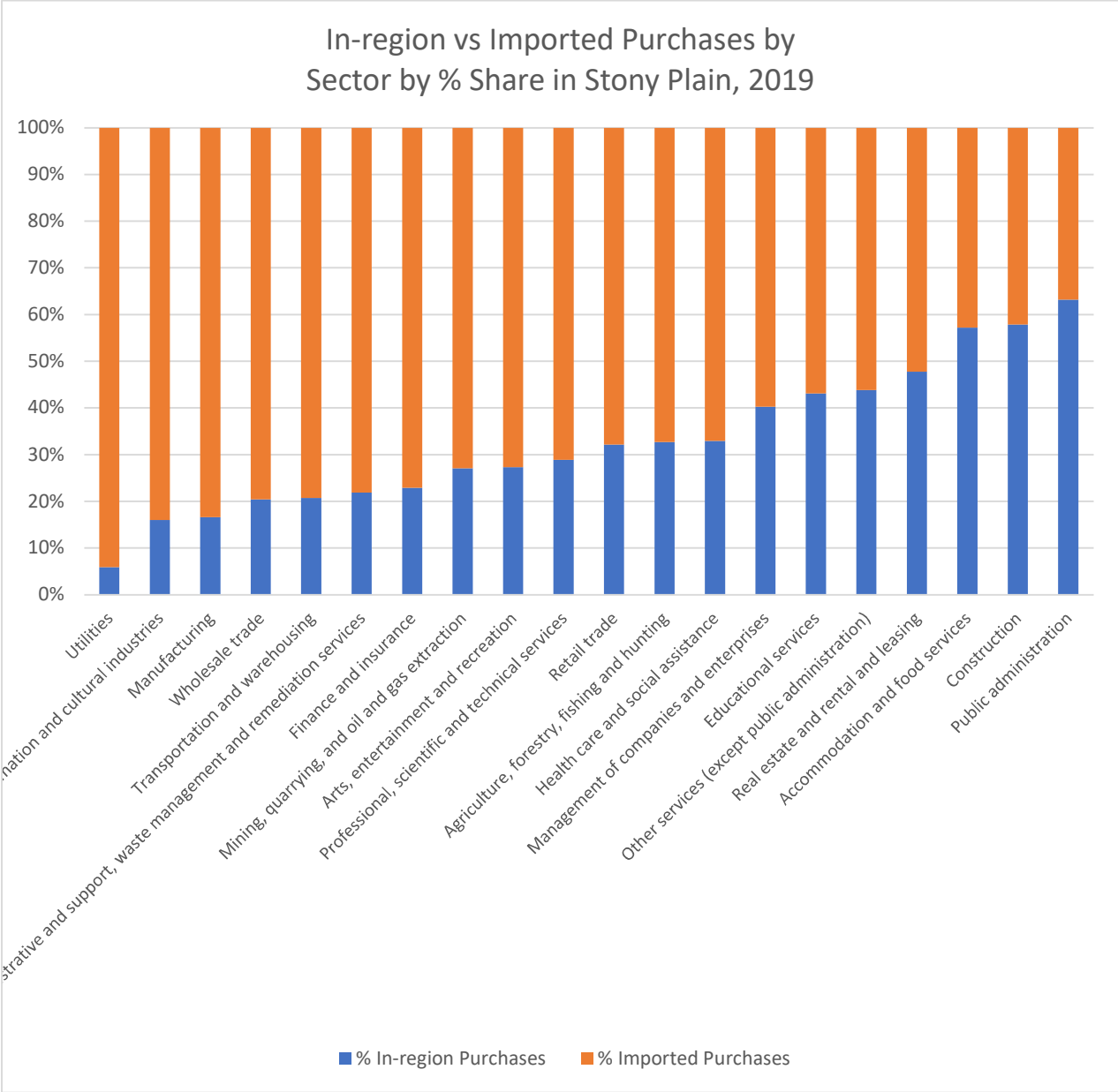
▼ Figure 37 - In-region vs Imported Purchases by Sector by Value in Stony Plain, 2019



Source: Emsi 2022

The Manufacturing sector had the most significant value of in-region purchases in Stony Plain in 2022 at \$28.4 million. The second and third largest in-region purchases by value were made up of the Professional, scientific and technical services and the Real estate and rental and leasing at \$16.2 and \$13.1 million respectively. In terms of imported purchases, the leading sectors were Manufacturing, by far at \$142.8 million, followed by Professional, scientific and technical services and Transportation and warehousing at \$39.9 and \$26.4 million, respectively, suggesting significant local supply chain gaps. The construction sector had the highest percentage of in-region purchases. The regional data for Stony Plain also indicate significant regional supply chain gaps along with the construction sector, which had the highest percentage of in-region purchases.

▼ Figure 38 - In-region vs Imported Purchases by Sector by Percentage Share in Stony Plain, 2019



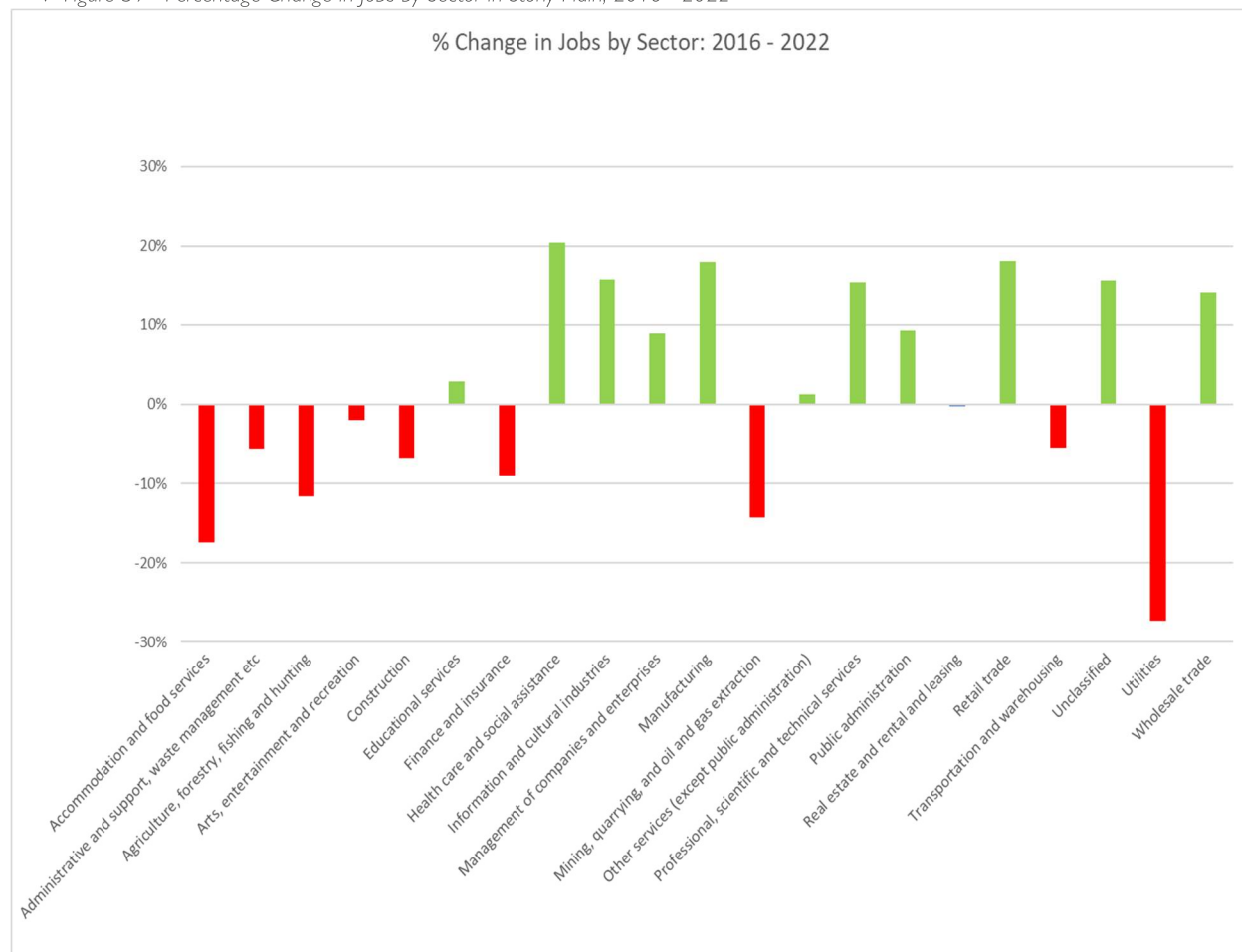
Source: Emsi 2022

Public administration had the leading percentage of purchases by a sector in-region at 63.2%, followed by Construction and the Accommodation and food services sectors, which were nearly tied at 57.8% at 57.2%, respectively. The leading purchasing sector by percentage of purchases imported was Utilities at 94.1%, while the second and third leading purchasing sectors were Information and cultural industries and Manufacturing, at 84% and 83.4%, respectively.

4.1.1.4 Employment / Talent

Employment

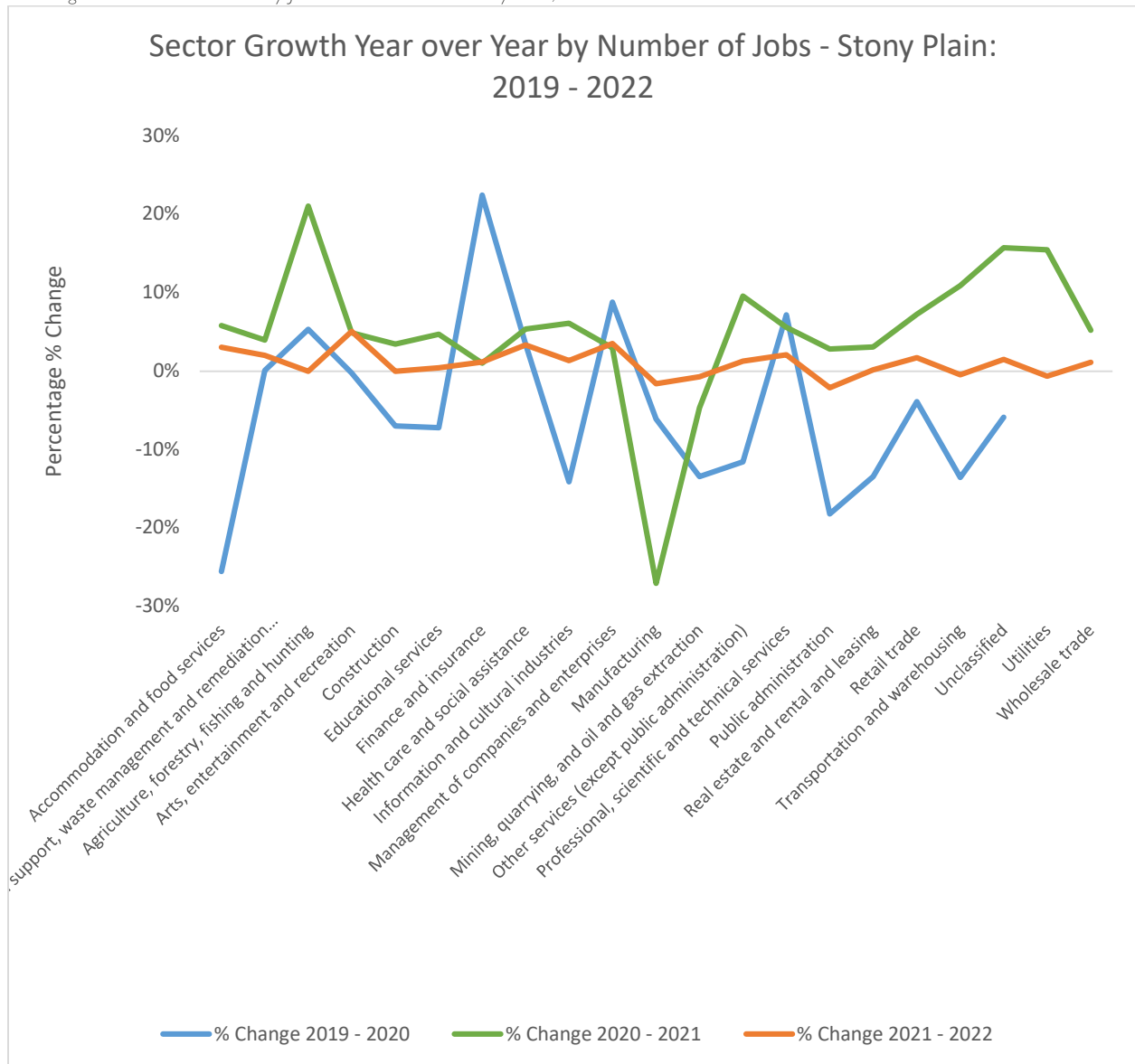
▼ Figure 39 - Percentage Change in Jobs by Sector in Stony Plain, 2016 - 2022



Source: Emsi 2022

Over the period of 2016 – 2022, the top-performing sectors in terms of growth percentage were Health care and social assistance at 20.4 % share, Retail trade at 18.14%, which was virtually tied with Manufacturing at 18.02%. The next top 3 sectors in terms of growth were Information and cultural industries at 15.78%, Professional, scientific and technical services at 15.5%, and Wholesale trade at 14.08% of jobs. While the worst-performing sectors (i.e., those with declines of more than -10%) included Utilities at – 27.27%, Accommodation and food services at -17.45, Mining, quarrying, and oil and gas extraction at – 14.34% and Agriculture, forestry, fishing and hunting at – 11.61%

▼ Figure 40 - Sector Growth by Jobs Year over Year in Stony Plain, 2019 - 2022

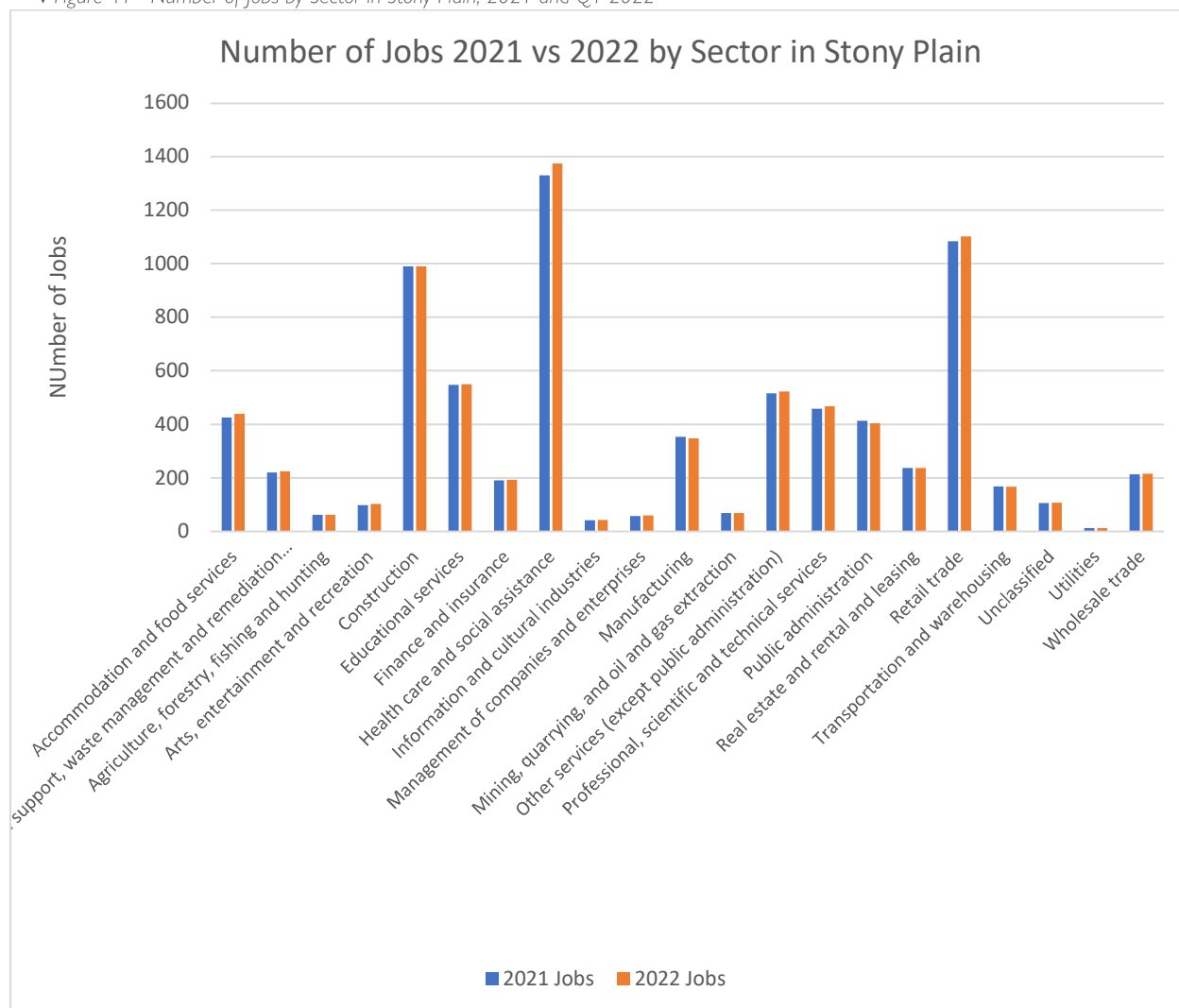


Source: Emsi 2022

Increases and decreases in the number of jobs between 2019 – 2021 were relatively volatile, with the pandemic undoubtedly a factor. However, from 2021 to 2022, the sectors stabilized. Job growth was small for the most part, and any decreases were minimal.

Arts, entertainment and recreation saw the largest percentage growth at 5.10% from 2021 to 2022. However, Health care and social assistance possessed the highest number of jobs in 2022 at 1,374, followed by Retail Trade and Construction, which had the second and third largest number of jobs in 2022 at 1,102 and 990, respectively.

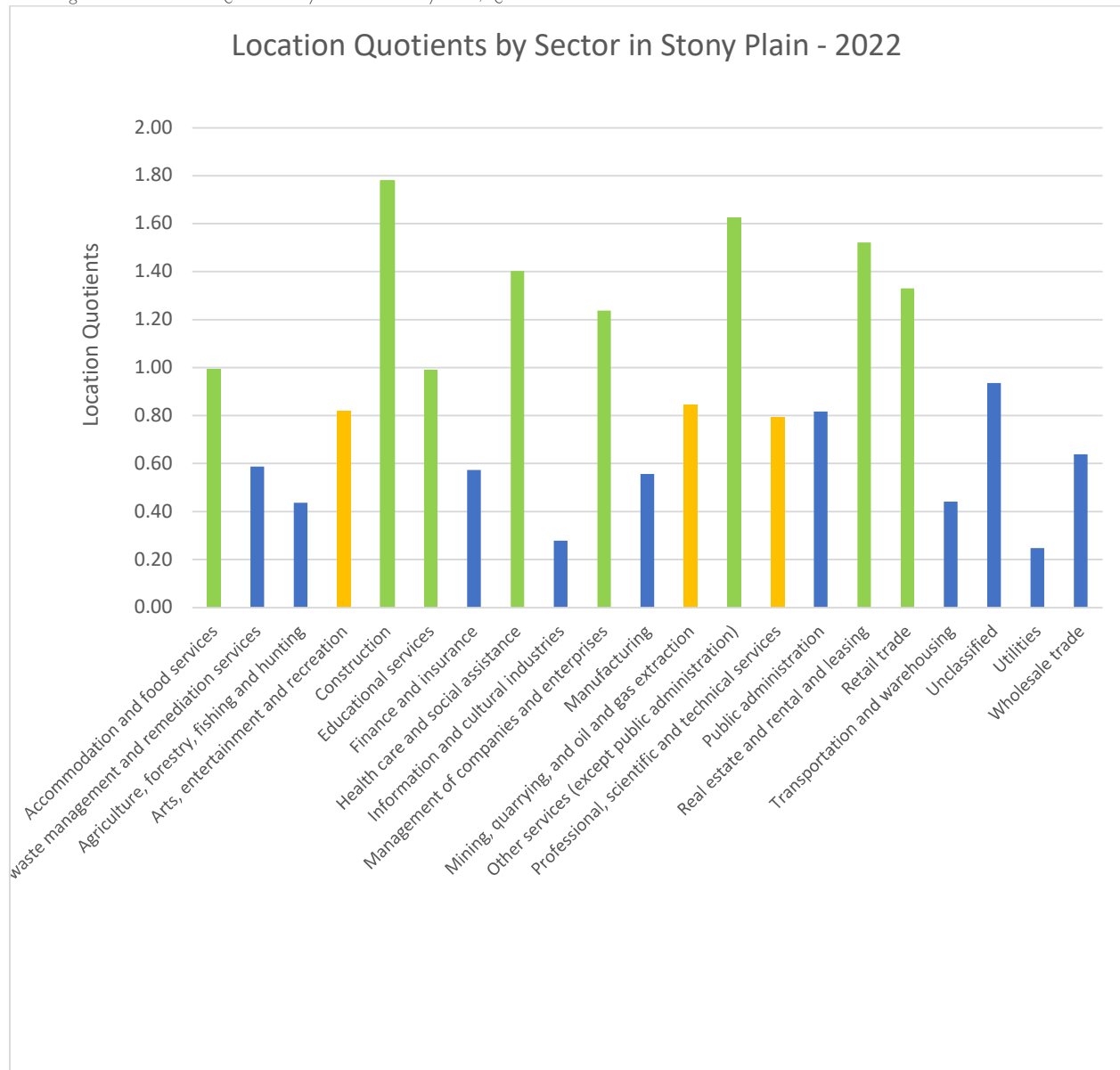
▼ Figure 41 - Number of Jobs by Sector in Stony Plain, 2021 and Q1 2022



Source: Emsi 2022

The biggest jobs producers in Stony Plain over the last two years have been in Health care and social assistance with moderate growth of 3.34% over the previous year, Construction, which was virtually flat, followed by Retail Trade which grew slightly by 1.71% in 2022 from 2021.

▼ Figure 42 - Location Quotients by Sector in Stony Plain, Q1 2022



Source: Emsi 2022

Location quotient (LQ) is calculated by comparing the share of regional employment of an industry or occupation with its share of national employment. This metric helps identify industries that are specialized in any given economic region as compared to the national average. For example, if an industry in a region accounts for 2.5% of jobs but only 1% of jobs nationally, then this industry has an LQ of 2.5, which means that it is 2.5x more concentrated in the region than the typical region. LQs are helpful in determining local or regional specialization and industries that stand out because of their higher-than-average per capita employment. However, an overly high LQ can denote dependence on one particular industry, when combined with a lack of diversity in the local economy.

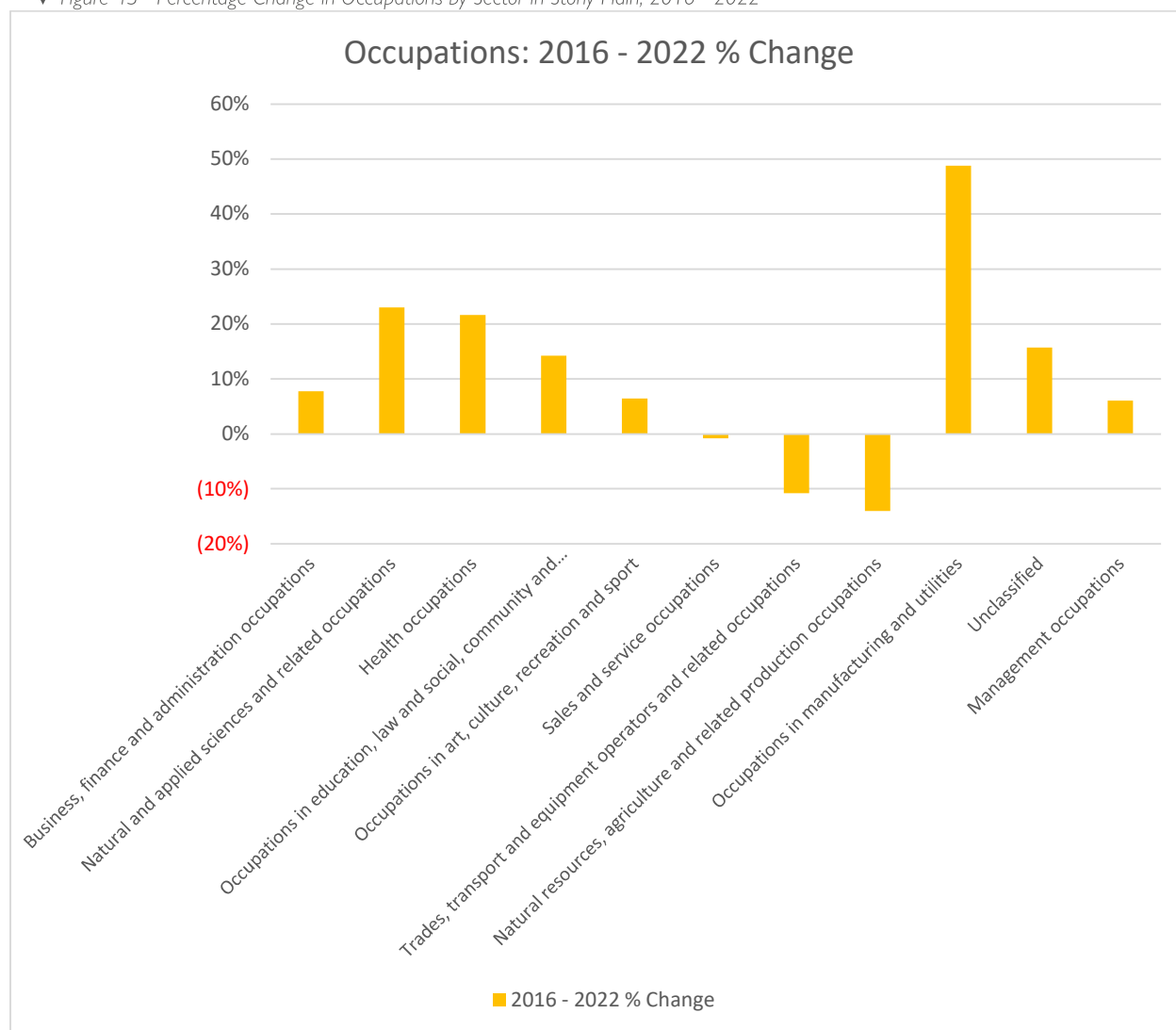
The sectors with the highest employment concentration (i.e., those with highest Location Quotients) were Construction (1.77), Other services (except public administration) (1.62), Real estate and rental and leasing (1.52), Health care and social

assistance (1.4), Retail trade (1.33) and Management of companies and enterprises (1.23). Relatively on par from a competitive perspective were the Accommodation and food services (.99) and Educational Services (.99) sectors.

While there is relatively low employment density on a provincial or national scale, Mining, quarrying, and oil and gas extraction (0.84) and Arts, entertainment and recreation (0.81), as well as Professional, scientific and technical services (0.79) and Information and cultural industries are worth a watching brief. Note, Public administration is excluded as it is not a potential target for investment attraction.

Occupations

▼ Figure 43 - Percentage Change in Occupations by Sector in Stony Plain, 2016 - 2022

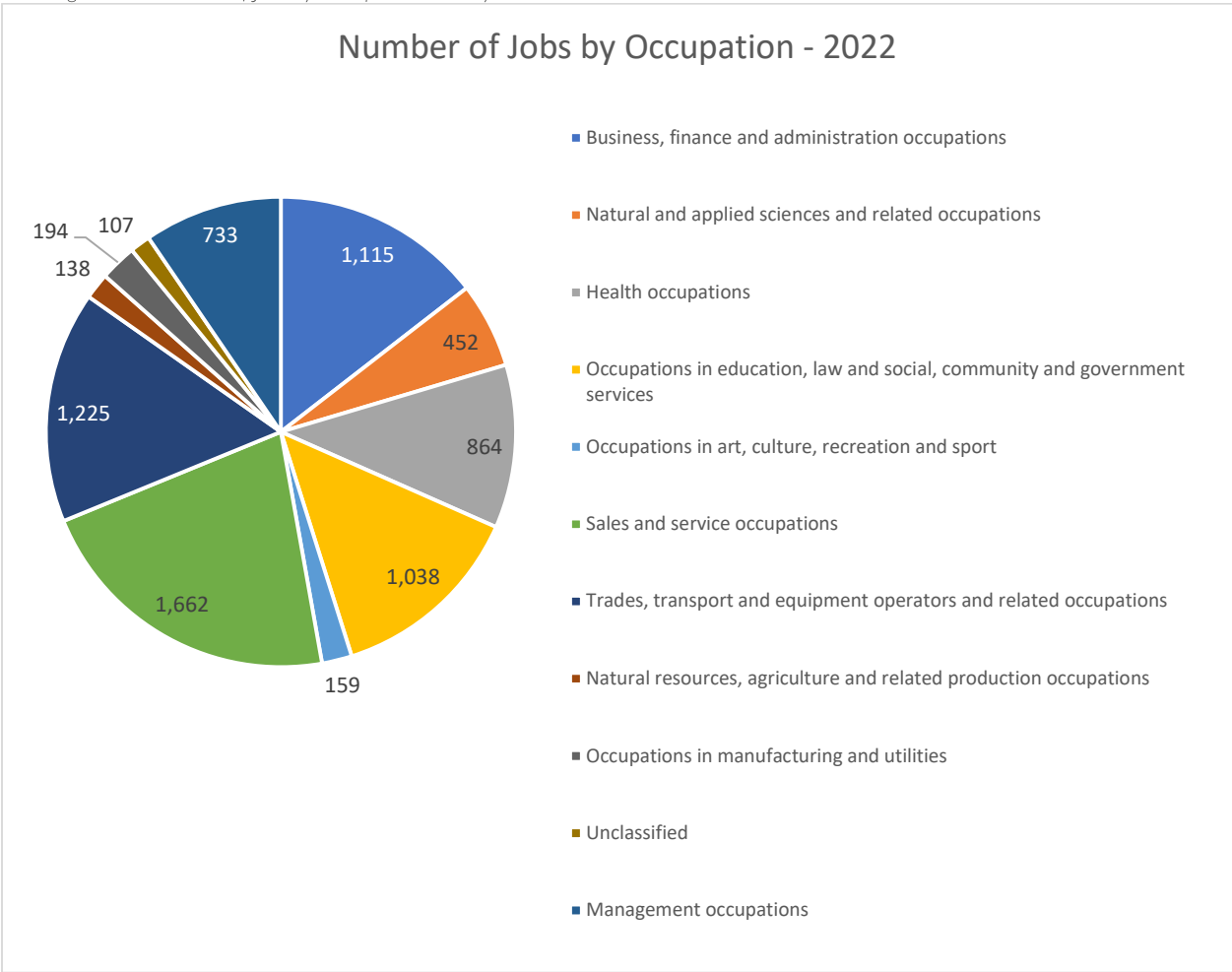


Source: Emsi 2022

Between 2016 – 2022, 80% of occupations observed growth, but only half of the top occupations in terms of the numbers of jobs grew. The largest growth was seen in Occupations in manufacturing and utilities (49%), followed by Natural and

applied sciences and related occupations (23%), Health occupations (22%) and Occupations in education, law and social, community and government services (14%). Note that Unclassified occupations accounted for 16% growth.

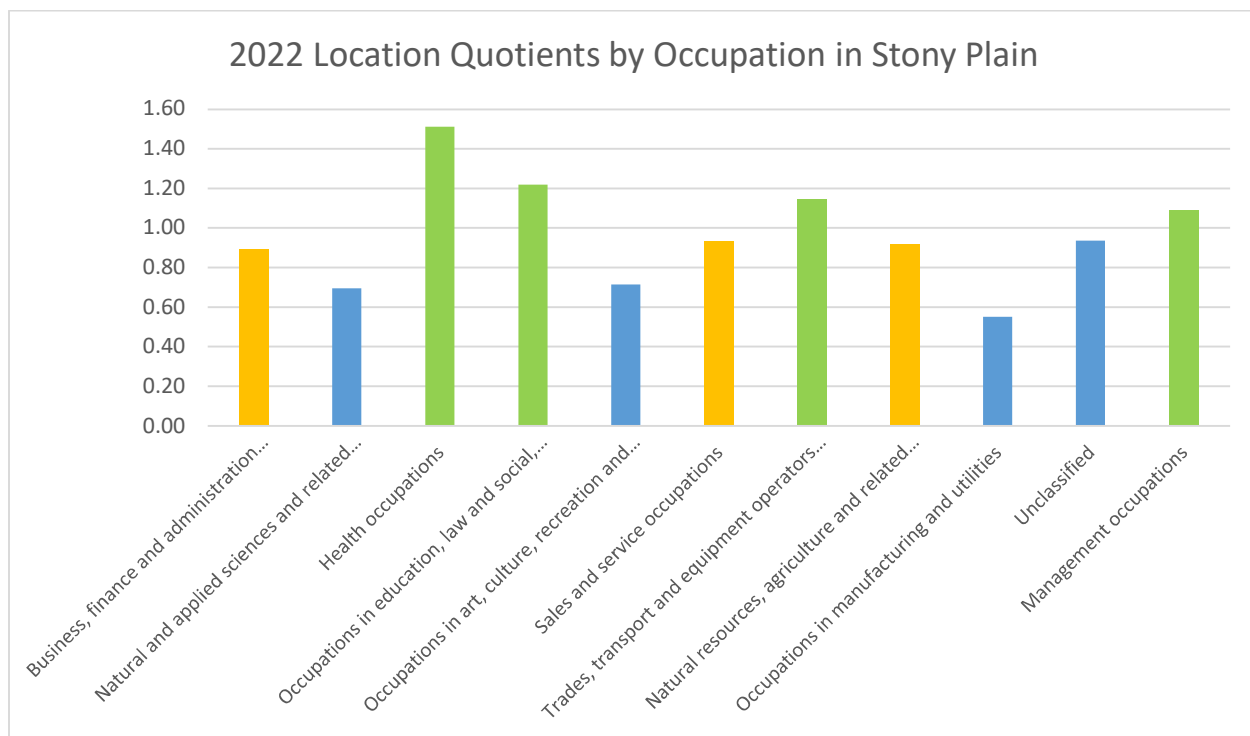
▼ Figure 44 - Number of Jobs by Occupation in Stony Plain, 2022



Source: Emsi 2022

The top leading occupations in Stony Plain in 2022 are Sales and service occupations (1,662 jobs), Trades, transport and equipment operators and related occupations (1,225 jobs), Business, finance and administration occupations (1,115 jobs), and Occupations in education, law and social, community and government services (1,038 jobs). Combined, these occupations account for 65.6 % of all jobs in Stony Plain.

▼ Figure 45 - Location Quotients by Occupation in Stony Plain, 2022



Source: Emsi 2022

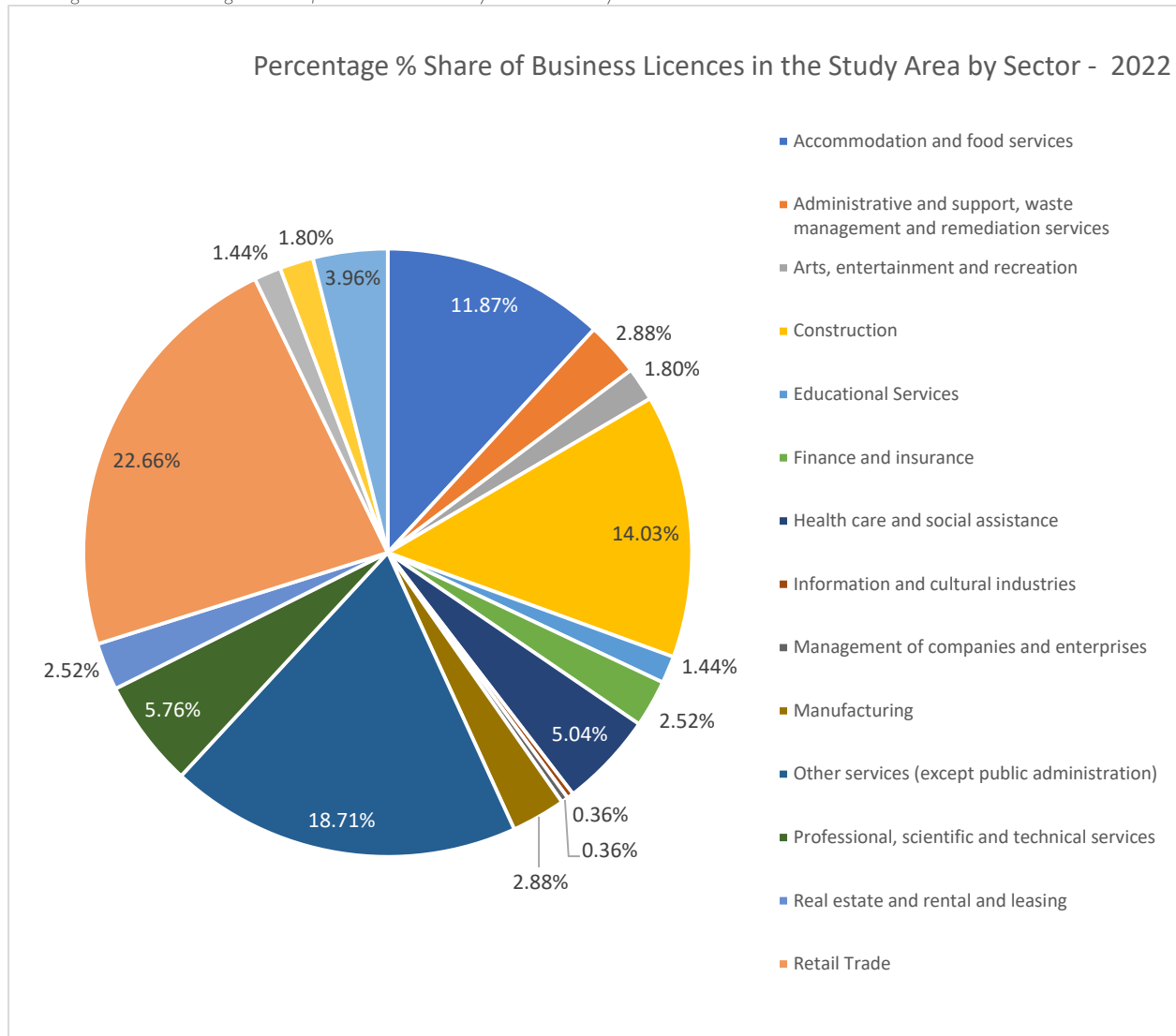
The occupations with the highest Location Quotient (LQ) in Stony Plain were Health occupations at an LQ of 1.51, Occupations in education, law and social, community and government services with an LQ of 1.22, Trades, transport and equipment operators and related occupations at 1.14 and Management occupations with an LQ of 1.09.

It is, however, worth noting that Sales and service occupations at an LQ of 0.93, and Natural resources, agriculture, and related production occupations at 0.92 and Business, finance, and administration occupations with an LQ of 0.89 are still relatively strong, albeit with slightly less density.

4.1.1.5 Target Sector Identification / Validation

Top Sectors 2022

▼ Figure 46 - Percentage Share of Business Licences by Sector in Study Area 2022



Source: Town of Stony Plain GIS Data 2022

Based on 2022 business license data, the top sectors in the Study Area are:

1. Retail Trade
2. Other services (except public administration)³

³ This sector comprises establishments, not classified to any other sector, primarily engaged in repairing, or performing general or routine maintenance, on motor vehicles, machinery, equipment and other products to ensure that they work efficiently; providing personal care services, funeral services, laundry services and other services to individuals, such as pet care services and photo finishing services; organizing and promoting religious activities; supporting various causes through grant-making, advocating (promoting) various social and political causes, and promoting and defending the interests of their members. Private households are also included. <https://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getVD&TVD=118464&CVD=118465&CPV=81&CST=01012012&CLV=1&MLV=5#:~:text=This%20sector%20comprises%20establishments%2C%20not,services%2C%20funeral%20services%2C%20laundry%20services>

- 3. Construction
- 4. Accommodation and food services
- 5. Professional, scientific and technical services
- 6. Health care and social assistance

The secondary sectors with lower concentrations of licenses (i.e., less than 5%) include:

- 7. Wholesale trade
- 8. Administrative and support, waste management and remediation services + Manufacturing
- 9. Finance and insurance + Real estate and rental and leasing

While Health care and social assistance are observed as top sectors due to their concentration of business licenses in the study area, they are not typically target sectors for investment attraction because they are typically public sector driven services as opposed to private sector and as such will not be included as one of the focus sectors for targeting.

Based on the preceding analysis, the following subsectors are suggested for further investigation.

▼ Figure 47 - List of Subsectors for Targeting Consideration

Sector/Subsector	Description	# of Licenses
Sector	Accommodation and food services	33
Sub-sector	Limited-service eating places	18
Sector	Arts, entertainment and recreation	5
Sub-sector	Fitness and recreational sports centres	4
Sector	Construction	39
Sub-sector	Construction of Buildings	6
Sub-sector	Highway, street and bridge construction	5
Sub-sector	Plumbing, heating and air-conditioning contractors	11
Sector	Finance and insurance	7
Sub-sector	Insurance agencies and brokerages	3
Sector	Health care and social assistance	14
Sub-sector	Child Day Care Services	5
Sub-sector	Offices of physical, occupational, and speech therapists and audiologists	6
Sector	Manufacturing	8
Sub-sector	Asphalt paving, roofing and saturated materials manufacturing	1
Sub-sector	Breweries	1
Sub-sector	Furniture and related product manufacturing	1
Sub-sector	Other basic organic chemical manufacturing	1
Sub-sector	Pesticide and other agricultural chemical manufacturing	1
Sub-sector	Plate work and fabricated structural product manufacturing	1
Sub-sector	Sporting and athletic goods manufacturing	1
Sub-sector	Wood kitchen cabinet and counter top manufacturing	1
Sector	Other services (except public administration)	52
Sub-sector	General automotive repair	12
Sub-sector	Personal care services	14
Sub-sector	Pet care (except veterinary) services	4
Sector	Professional, scientific and technical services	16
Sub-sector	Accounting, tax preparation, bookkeeping and payroll services	3
Sub-sector	Testing laboratories	2
Sub-sector	Veterinary services	2
Sector	Retail	63
Sub-sector	Food and beverage stores	9
Sub-sector	Miscellaneous store retailers	14
Sub-sector	Motor vehicle and parts dealers	11
Sub-sector	Pharmacies and drug stores	4
Sector	Transportation and warehousing	4
Sub-sector	Bulk liquids trucking, local	1
Sub-sector	General freight trucking, local	1
Sub-sector	Motor vehicle towing	1

Alignment with Retail Trade area	
Lower concentration but relevant or support activities to existing sectors	
Relatively high concentration	

Source: Town of Stony Plain GIS Data 2022

Sectors/subsectors in orange have an alignment with the Retail Trade area, which is a significant component of the Stony Plain economy.

Some sectors/subsectors highlighted in green provide support activities for Energy and Extraction - businesses, including the Tervita field offices (environmental and waste management services to the oil and gas sector). While other subsectors highlighted in green could be a potential fit for further development through investment attraction in which supply chain gaps are evident at both a regional and local level in professional and technical services and manufacturing. A talent pool

in transport, trades and equipment, and related occupations bodes well for the expansion of manufacturing, transportation, and warehousing activities.

Finally, sectors/subsectors highlighted in yellow show potential due to their moderate to a high concentration of business licenses.

When we combine the percentage share of business licenses by sector in the study area with the most competitive sectors by Location Quotient in Stony Plain (i.e., Construction (1.77), Other services (except public administration) (1.62), Real estate and rental and leasing (1.52), Retail trade (1.33) and Management of companies and enterprises (1.23) and while not as highly competitive but relevant Accommodation and food services (.99)) the ideal target sectors for prioritization are as follows:

1. Retail Trade
2. Other services (except public administration)
3. Construction
4. Accommodation and food services
5. Professional, scientific and technical services

The secondary sectors to target and prioritize:

6. Administrative and support, waste management and remediation services
7. Manufacturing

Note, Health care and social assistance was excluded as it is not a viable target sector for investment attraction due to the fact that the sector is predominantly funded by government/public institutions and are therefore not active in terms of investment by private companies. For example, subsectors in the sector include hospitals, nursing and residential care facilities and social assistance.

Other services (except public administration), as per this sector⁴ comprises establishments, not classified to any other sector, primarily engaged in repairing, or performing general or routine maintenance, on motor vehicles, machinery, equipment and other products to ensure that they work efficiently; providing personal care services, funeral services, laundry services and other services to individuals, such as pet care services and photo finishing services; organizing and promoting religious activities; supporting various causes through grant-making, advocating (promoting) various social and political causes, and promoting and defending the interests of their members. Private households are also included.

Real estate and rental and leasing was also excluded as it is not a typical focus sector for investment attraction. However, we do note that this sector has several linkages to the construction sector, and commercial/industrial real estate is of importance to site selectors, as such it remains relevant but is not a priority for targeting at this point.

⁴ NAICS 2012 - 81 - Other services (except public administration) - Sector
<https://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getVD&TVD=118464&CVD=118465&CPV=81&CST=01012012&CLV=1&MLV=5>:

4.2 Evaluation of Retail Trade and Influence on Businesses

4.2.1 Approach and Methodology

GIS mapping identified business licenses in the study area. EMSI Analyst was utilized to provide data on establishments, employment, and expenditure in Stony Plain, indicating the nature of retailing in the retail trade area compared to the whole of Stony Plain. This approach ensures that gaps identified reflect the whole town to enable complementary industries instead of drawing away from other retail employment areas. As the data sources differ between the GIS mapping and the business establishments, data comparisons between the two are estimates. Detailed tables to support this analysis are presented in Appendix E.

4.2.2 Evaluation of Retail Trade Area

The retail trade area (RTA) consists of businesses involved in retailing goods (retail trade) and retail services, in which businesses provide services, as opposed to products, to consumers. The area sits on Highway 16A corridor and secondary Highway 628 and is easily accessible by a regular public transportation service and road links to the surrounding regions. Retail area traffic volumes declined between 2015 and 2021 due to changes in the Alberta economy and the pandemic.

Retailing is a critical component of the study area and the Stony Plain economy. Retail and retail services sector highlights include:

- ▶ Businesses licenses comprise 171 or 61.3% of the 279 identified in the study area
- ▶ An examination of the business licenses suggests a predominance of local and regional businesses
- ▶ Business establishments and employment in Stony Plain declined modestly between 2016-2021, reflecting a robust sector in the face of Covid-19
- ▶ Combined, retail and retail services employ 2,646 in Stony Plain, representing an increase of 8% between 2016 and 2021
- ▶ 257 of the 388 (or 66%) of the retail and retail service establishments in Stony Plain are either indeterminate⁵ (no employees) or have 1-4 employees
- ▶ The total expenditure in retail trade is \$12,963,344 with 32% or \$4,168,043 of expenditure remaining in Stony Plain with retail services at \$31,640,161 or with 41% or \$12,894,821 expenditure in Stony Plain⁶
- ▶ Retail Trade employment has a high concentration (location quotient:1.33) in Stony Plain, being the fifth highest, behind construction, other services – except public administration, real estate/rental/leasing, and health care & social assistance
- ▶ The Retail Trade (NAICs 44-45) is the 2nd highest employer by sector (2-digit NAICs) in Stony Plain (2021), with the 2nd highest employment growth (18%) between 2016-2022, health care & social assistance

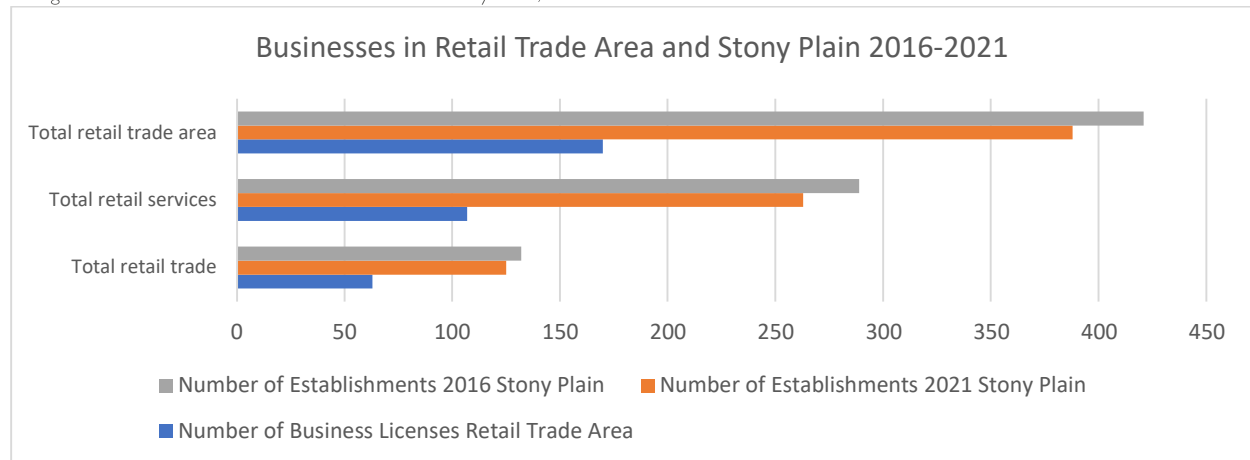
4.2.2.1 Number of Businesses Licenses and Business Establishments

⁵ Defined as having no employees in so far as they do not submit payroll remittances to CRA. These businesses may still have a workforce of contracted workers – including gig economy and solopreneurs, family members or business owners

⁶ Some retail services are excluded due to lack of data

NAICs codes for all business licenses were identified and mapped to retail trade categories at 3-digit level and 4-digit level for retail services categories to provide sufficient detail. ▼ Figure 48 Businesses in Retail Trade Area and Stony Plain below shows the number of retail and retail services business licenses and establishments, with trends between 2016-2021. The study's retail trade area comprises approximately 41% of retail and retail service businesses in Stony Plain. Retail services stores are an important component of the retail trade area outnumbering retail business licenses by nearly two to one. These businesses include hotels, restaurants, childcare, gyms, and insurance agents. (Table 1.1 in Appendix E)

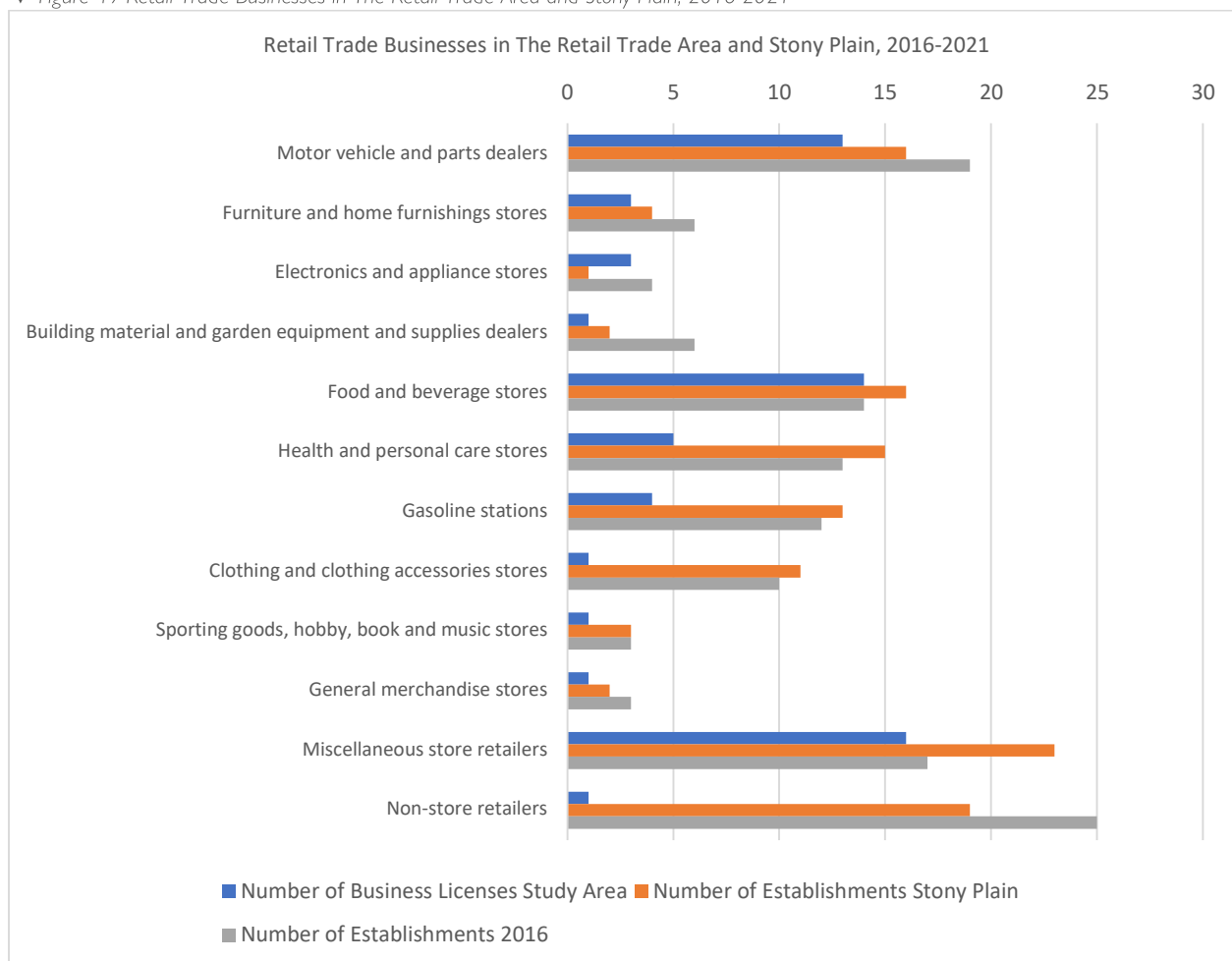
▼ Figure 48 Businesses in Retail Trade Area and Stony Plain, 2016-2021



Source: EMSI Analyst, 2021, GIS, 2022

▼ Figure 497 and ▼ Figure 508 below show retail trade and retail services compared in terms of the number of business licenses and the number of establishments in Stony Plain to indicate each category's concentration in the retail trade area. Trends in the number of establishments between 2021 and 2016 are also shown.

▼ Figure 49 Retail Trade Businesses in The Retail Trade Area and Stony Plain, 2016-2021



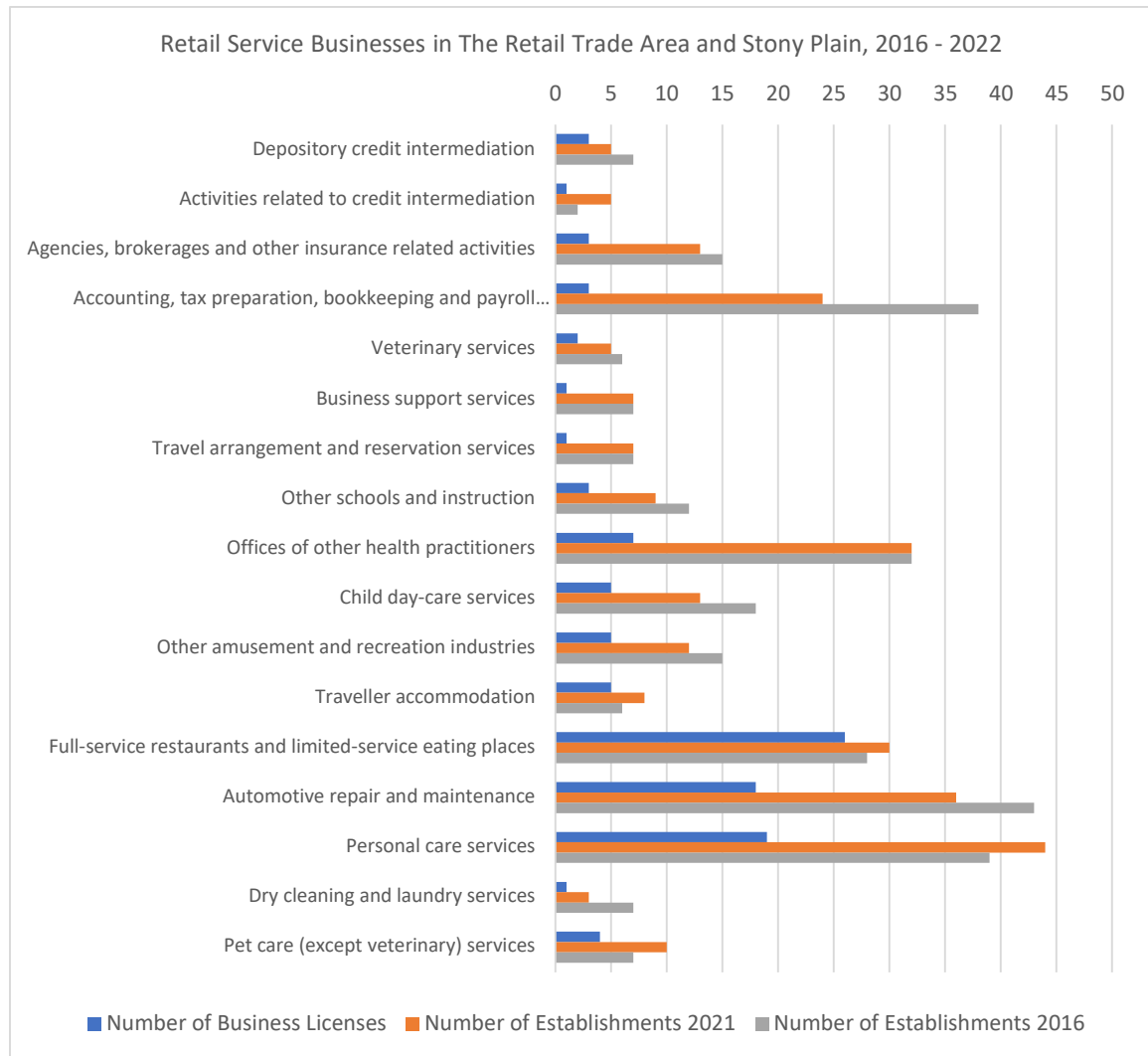
Source: EMSI Analyst, 2021, GIS, 2022

The most significant retail categories in number and prominence in the study's retail trade area as compared to the remainder of Stony Plain, experienced the following trends:

- ▶ Miscellaneous stores (including fast-growing pet stores and used merchandise, along with florists, office supplies stores, stationery stores, gift, novelty, and souvenir stores) experienced strong growth at 35% in the number of establishments in Stony Plain
- ▶ Motor vehicle and parts dealers with a decline of 16%, losing three establishments
- ▶ Food and beverage stores, with the number of establishments, increased by 14% between 2016-2021
- ▶ Furniture and home furnishings stores, but small in number and the loss of two establishments represent a decline of 33% (Table 1.2 in Appendix E)

4.2.2.2 Retail Service Businesses in The Retail Trade Area and Stony Plain

▼ Figure 50 Retail Services Businesses in The Retail Trade Area and Stony Plain, 2016-2022



Source: EMSI Analyst, 2021, GIS, 2022

The most significant retail services categories in terms of numbers and presence in Stony Plain experienced the following trends:

- ▶ Food service and drinking places, with most of the major fast-food chains adding two restaurants, equating to 7% growth between 2016-2021
- ▶ General automotive repair/car washes with a 16% decline in establishments (2016-2021), losing seven shops
- ▶ Personal care services facilities are significant in the retail trade area, but over 50% can be found elsewhere in Stony Plain with the addition of 5 outlets equating to a 13% between 2016-2021
- ▶ Pet care added three facilities, equating to a 43% increase, a possible reflection of Covid impacts (Table 1.3 in Appendix E)

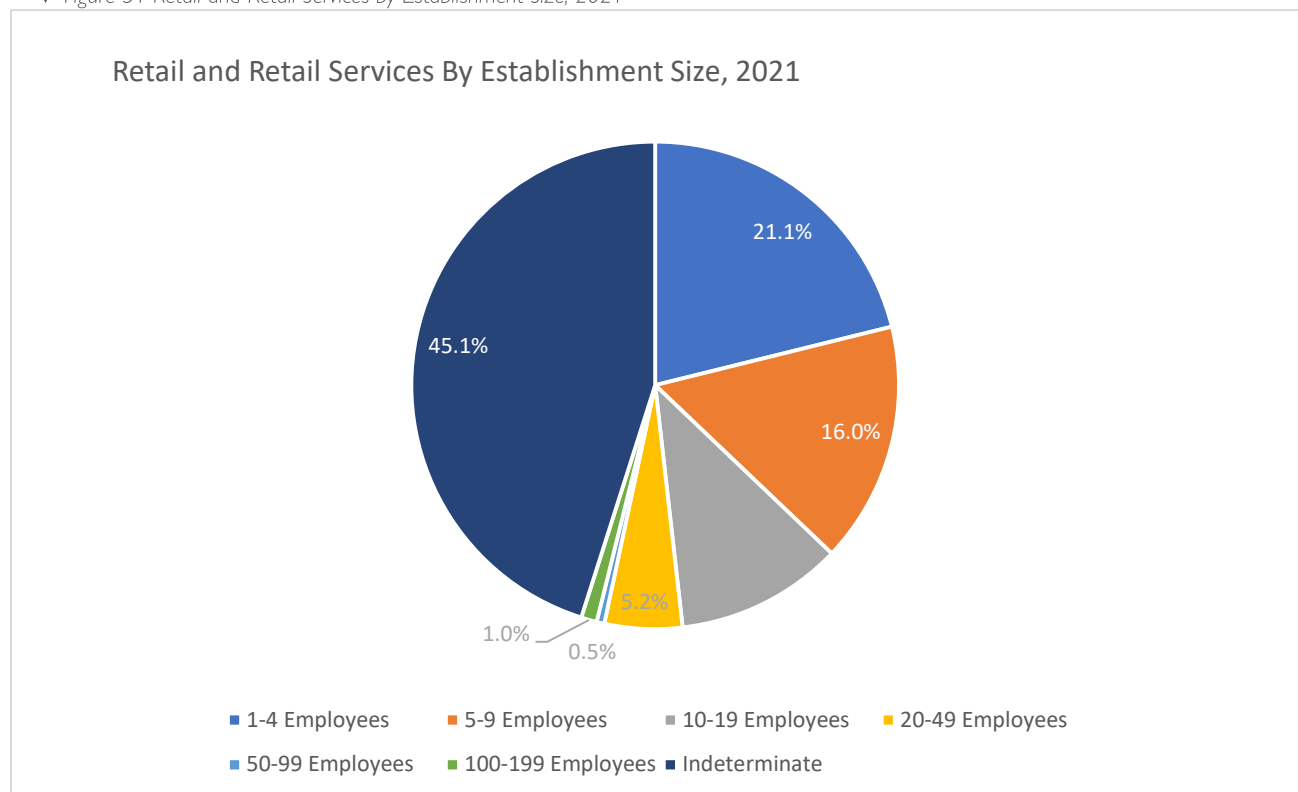
Otherwise, categories experiencing a fall in the number of establishments between 2016-2021 included depository credit intermediation (personal banking) declining by 29%, or the loss of two institutions, child day care services falling by 28% with the loss of 5 facilities (Table 1.3 in Appendix E).

The retail service area has important amenities for investment attraction to the area in light of its proximity to the employment lands and employee needs.

- ▶ Day to day services such as pet care, child daycare and to a lesser extent, personal banking with three of the five banks, automotive repair, and optometrists have a significant presence in the area
- ▶ Also of note are the number of hotels, with five of the eight in Stony Plain within the retail trade area. These include international chains, which is beneficial for investors for on-site visits

▼ Figure 51 below shows the distribution of retail and retail service employment in Stony Plain. The importance of small businesses is demonstrated by 257 of the 388 or 66% of the retail and retail service businesses have 1-4 employees, with 5-9 the next largest employee range or are indeterminate. The latter category are businesses that have no employees in so far as they do not submit a payroll account to the CRA. They include businesses utilizing contractors, which are growing in number as are 'gig' economy workers, and family members who could be prevalent in the retail and retail services space. An examination of the businesses in the retail trade area suggests the majority are local or regional businesses rather than national or multinational chains. Notably, two food and beverage stores employ between 100-199 people. (Table 1.4 in Appendix E)

▼ Figure 51 Retail and Retail Services by Establishment Size, 2021



Source: EMSI Analyst, 2021

Retail Expenditure

This retail expenditure analysis is based on data from the Statistics Canada National Symmetric Input-Output table; National Household Survey commuting flows, Canadian Business Patterns, and several EMSI in-house data sets. The data in Figure 50 shows retail expenditure in Stony Plain in-region purchases and imported purchases, with the total expenditure indicating market size. This builds a picture of potentially underserved retail categories in Stony Plain.

Retail Trade

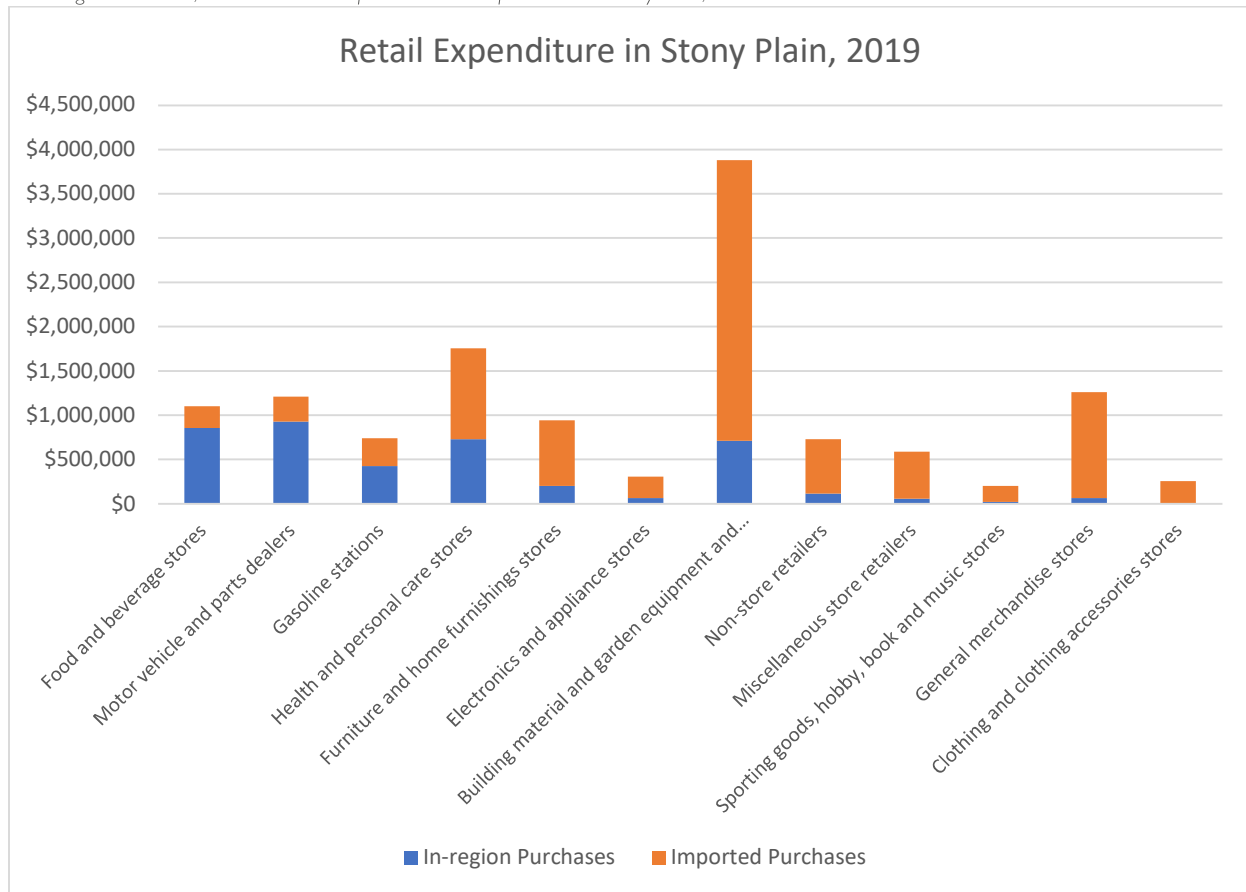
The categories demonstrating the highest value in-region expenditures are:

- ▶ Motor vehicle and parts with 77% of purchases remaining in-region
- ▶ Food and beverage stores with 78% spent in-region, and
- ▶ Health and personal care stores, but only 41.5% of spend remains in-region, with the second-highest total expenditure

The categories where there is the most leakage and reflect their minuscule presence in Stony Plain are:

- ▶ Building materials and garden equipment and supplies dealers fourth-ranked by in-region expenditure, but only 18% of it is spent in the region with the highest overall expenditure at just under \$4 million
- ▶ General merchandise stores, which include dollar stores, generated the third-highest expenditure overall, with 95% expenditure outside the region
- ▶ Sporting goods, hobby, book and music stores, miscellaneous store retailers, and clothing and clothing accessories stores have room for new retail businesses in the retail trade area, but the overall expenditure is minimal
- ▶ Note there are data anomalies concerning activities related to clothing and accessories, which has a presence in the study area but registered no in-region expenditure (Table 1.5 in Appendix E)

▼ Figure 52 Total, in-Market and Imported Retail Expenditure in Stony Plain, 2019

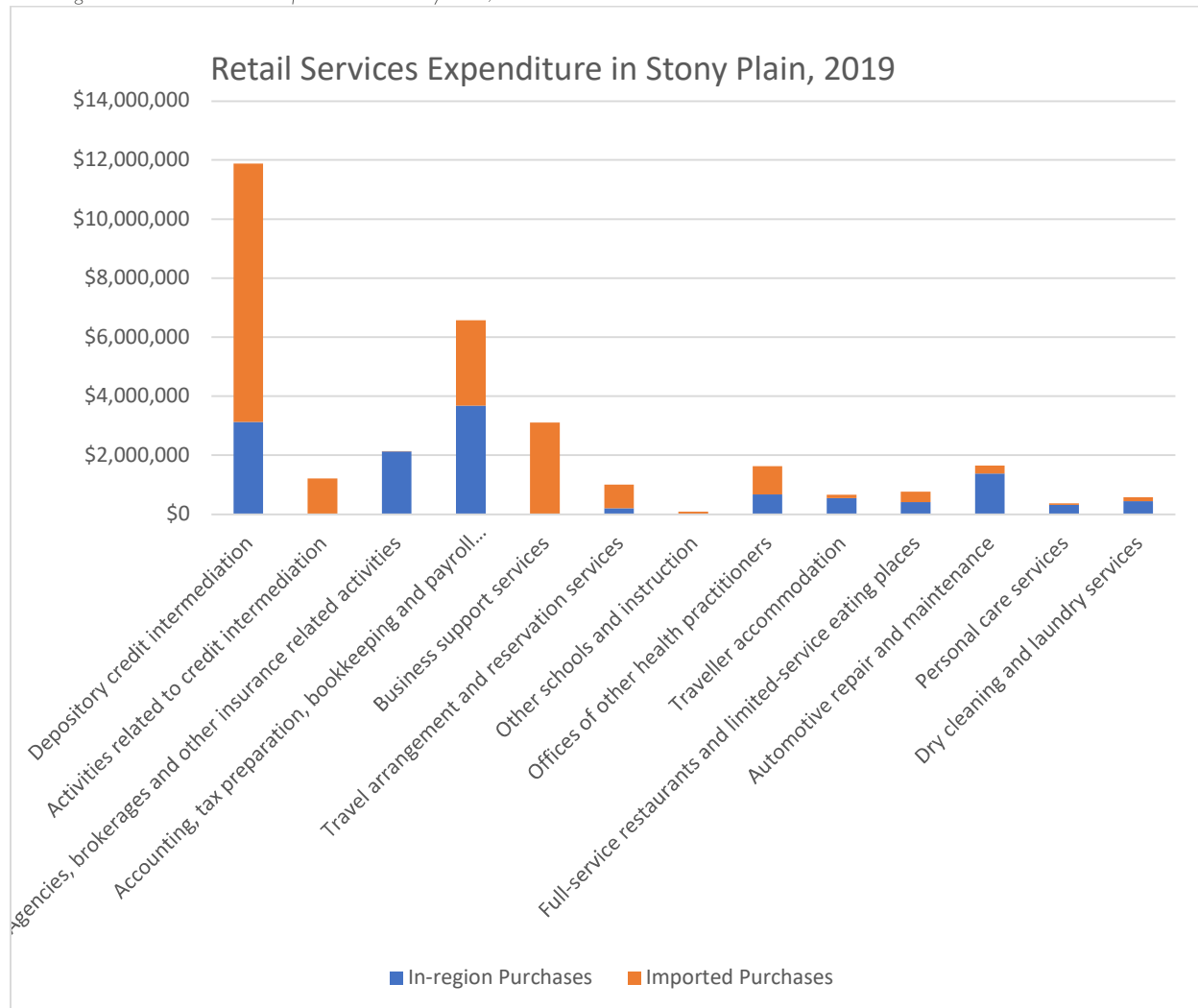


Source: EMSI Analyst, 2019

Retail Services

- ▶ A significant amount of retail services expenditure is in-region with over 75% for agencies, brokerages and other insurance-related activities, traveler accommodation, automotive repair and maintenance, personal care services, and dry cleaning and laundry services
- ▶ Over 50% of expenditure at full-service restaurants and limited-service eating places leaves the town resulting in the expenditure being spent outside of Stony Plain.
- ▶ The most significant in-region expenditure has a substantial financial services component with depository credit intermediation, followed by accounting, tax preparation, bookkeeping and payroll services, agencies, brokerages, and other insurance-related activities, as well as automotive repair and maintenance
- ▶ The high levels of in-region expenditure in these activities are also reflected in the overall expenditure
- ▶ Note there are data anomalies concerning activities related to credit intermediation and business support activities, both of which have a presence in the study area but registered no in-region expenditure
- ▶ Data is unavailable for pet care (except veterinary) services or veterinary services and childcare (Table 1.6 in Appendix E)

▼ Figure 53 Retail Services Expenditure in Stony Plain, 2019



Source: EMSI Analyst, 2019

4.2.3 Employment Trends

▼ Figure 542 and ▼ Figure 553 show changes in employment between 2016 and 2021 in the retail trade and retail services by category.

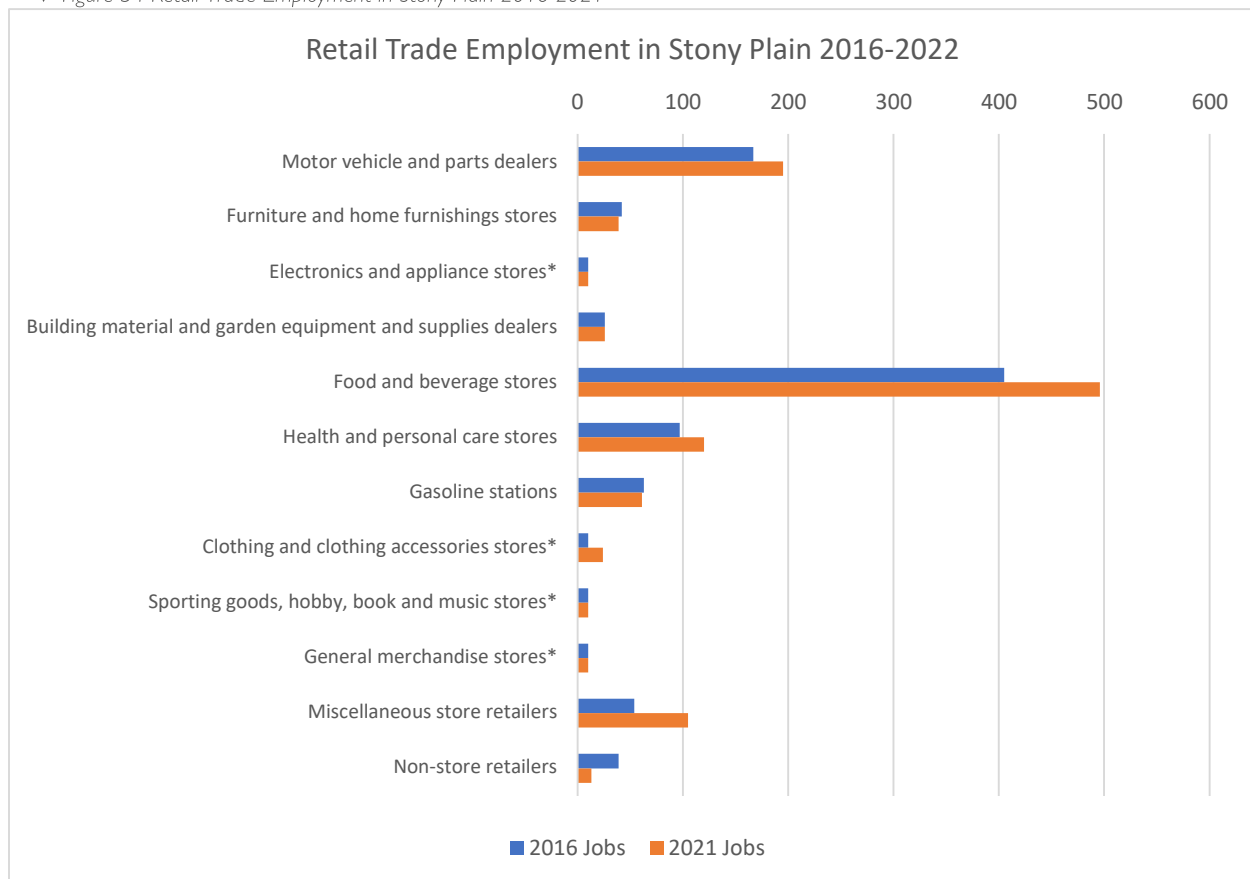
Retail Trade

The following are key highlights in employment trends in the retail trade between 2016 and 2021 (Table 1.7).

- ▶ Overall retail trade employment increased by 18% to 1,102 between 2016 and 2021, reflecting a robust sector in light of challenges posed by Covid-19
- ▶ In 2021 food and beverage stores employed the highest number of people, with 496 representing 43% of retail trade employment in Stony Plain. As noted earlier, two establishments employ between 100-199 people
- ▶ The following most significant categories, by a distant margin, are motor vehicle and parts dealers (195; 17.6%), health and personal care (120; 10.8%) and miscellaneous store retailers (105; 9.5%)

- ▶ These categories have a significant presence in the study area as compared to the remainder of Stony Plain and are important contributors to employment in Stony Plain
- ▶ Categories showing the most substantial employment growth during 2016-2021 are prominent in the retail trade area - miscellaneous stores at 94%, which includes fast-growing segments such as pet stores and secondhand items, food and beverage (23%), motor vehicle and parts dealers (17%) and personal care stores (22%)
- ▶ The steepest declines between 2016-2021 were seen in non-store retailers where goods are sold by non-store retail methods, such as catalogues, marketing but this category has no presence in the study area
- ▶ Otherwise, most categories experienced a minimal decline. It is harder to establish trends due to insufficient data⁷ in some categories, as indicated in the table (Table 1.7 in Appendix E)

▼ Figure 54 Retail Trade Employment in Stony Plain 2016-2021



*Estimates due to Insufficient data availability

Source: EMSI Analyst, 2022

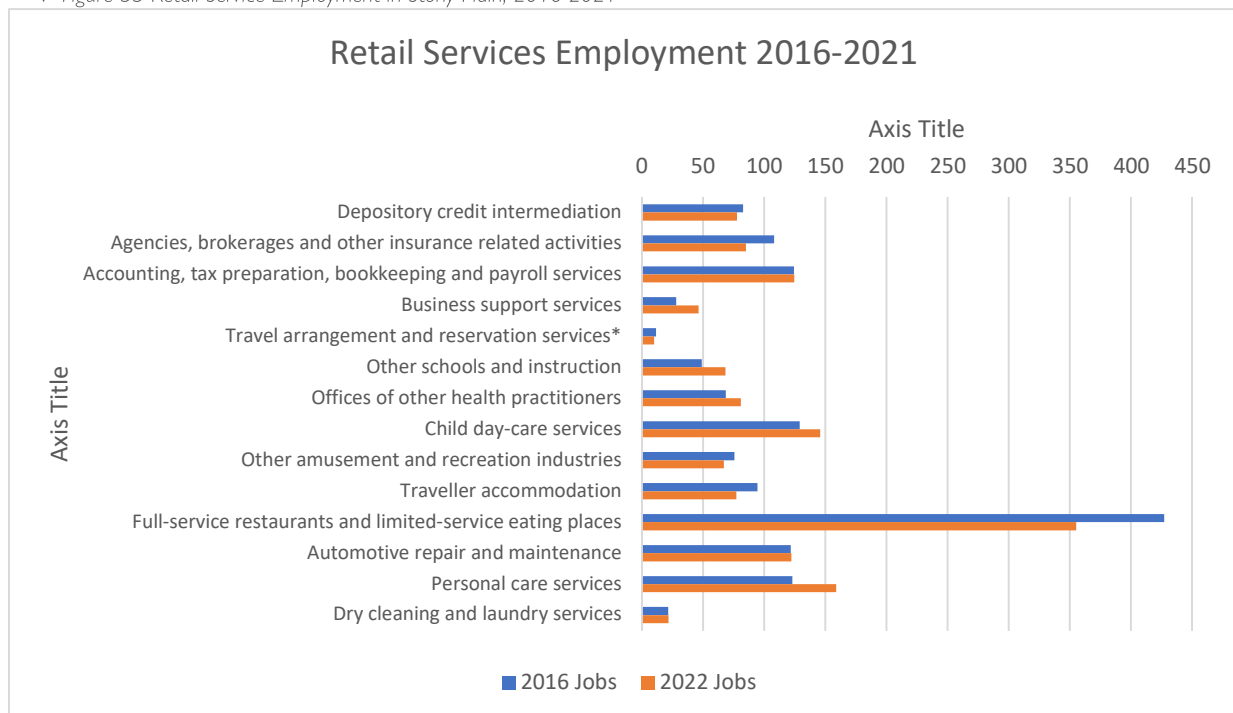
⁷ For industries with less than 10 jobs in any given region, 'Insufficient Data' occurs when the small number of jobs makes it impossible to calculate meaningful data for a given metric in EMSI Analyst

Retail Services

▼ Figure 553 below shows employment trends between 2016 and 2021 in retail services categories (Table 1.8).

- ▶ Overall, retail services employment was 1,544, with a minimal decline of 2% between 2016 – 2022, suggesting the sector weathered Covid-19.
- ▶ Employment declines might be explained by challenges in staff recruitment and vacant positions as much as job losses
- ▶ Full-service restaurants and limited-service eating places employ the most by far in retail services with 355 jobs in 2022, however, there was a 17% decline from 427 jobs in 2016
- ▶ Five categories employ between 90 and 130 people. Of these, traveler accommodation, child day care services, personal care services, and automotive repair and maintenance have a significant presence in the retail trade area
- ▶ Combined with full-service restaurants and limited-service eating places, these categories represent 28% of retail services employment in Stony Plain
- ▶ Traveler accommodation employment declined by 18% between 2016 and 2022, and other amusement and recreation industries (11%) reflecting Covid-19 impacts and possible challenges in staff recruitment
- ▶ Employment increases were seen in child day care (13%), other schools and instruction which caters to children and youth (39%) and offices of other health practitioners (18%), which includes demographic demand-led hearing and ophthalmic services
- ▶ The most substantial employment gains were in business services (65%), but this category has a minimal presence in the retail trade area (Table 1.8 in Appendix E)

▼ Figure 55 Retail Service Employment in Stony Plain, 2016-2021



*Estimates due to Insufficient data availability

Source: EMSI Analyst, 2022

Employment Concentration

▼ Figure 564 and ▼ Figure 575 below show employment concentration by category in Stony Plain and describes the extent of the category's presence in the retail trade area.

Retail Trade

The retail trade (NAICS 44-45) overall has a high location quotient or industry employment concentration (1.33) compared to Canada⁸.

▼ Figure 56 Retail Trade Employment Concentration, 2022

NAICS	Very High > 2.0	Location Quotient	Presence in Retail Trade Area
441	Motor vehicle and parts dealers	2.27	Significant
445	Food and beverage stores	2.23	Significant
	High > 1.0 – 2.0		
442	Furniture and home furnishings stores	1.29	Significant
446	Health and personal care stores	1.48	Significant
447	Gasoline stations	1.88	Not significant
453	Miscellaneous store retailers	1.91	Not significant
	Very Low < 0.5		
444	Building material and garden equipment and supplies dealers	0.43	Not significant
443	Electronics and appliance stores	0.38	Not significant
446	Clothing and clothing accessories stores	0.33	Not significant
451	Sporting goods, hobby, book and music stores	0.19	Not significant
452	General merchandise stores	0.10	Not significant
454	Non-store retailers	0.39	Not significant

Source: EMSI Analyst, 2022

- High or very high employment concentration in retail and retail services occurs in 17 out of the 22 categories with either a high or medium presence in the retail trade area, underlining its importance as an employment area
- Careful consideration should be given to attraction in these categories to maintain a balanced retail and retail services portfolio

⁸ EMSI does not provide location quotient as measured against the province

- Low or very low employment concentration occurs in 8 of the 9 categories with a low presence in the retail trade area, suggesting potential attraction opportunities in these categories without conflicting with the existing retail base outside this area (Tables 1.9, 2.0)

▼ Figure 57 Retail Services Employment Concentration, 2022

NAICS	Description	2022 Location Quotient	Presence in Retail Trade Area
Very High > 2.0			
8111	Automotive repair and maintenance	2.06	Significant
8121	Personal care services	2.53	Significant
8123	Dry cleaning and laundry services	2.64	Low
High > 1.0 – 2.0			
5242	Agencies, brokerages and other insurance-related activities	1.88	Medium
5412	Accounting, tax preparation, bookkeeping and payroll services	1.66	Low
5614	Business support services	1.25	Low
6116	Other schools and instruction	1.29	Medium
6213	Offices of other health practitioners	1.10	Low
6244	Child daycare services	1.83	Medium
7139	Other amusement and recreation industries	1.12	Medium
7211	Traveler accommodation	1.53	Significant
7225	Full-service restaurants and limited-service eating places	1.01	Significant
Low 0.5-1.00			
5221	Depository credit intermediation	0.62	Significant
5615	Travel arrangement and reservation services	0.61	Low

Source: EMSI Analyst, 2022

4.2.4 Retail and Retail Services Occupational Pool

▼ Figure 586 shows the number of retail and retail services occupations in Stony Plain. The retail trade area can draw on just over 1,000 people in applicable occupations, a total that has remained largely flat since 2016, declining by just 2%. However, this masks some mixed performance in different types of occupations:

- ▶ The number of retail trade related occupations increased by 11% from 373 to 415 people
- ▶ Declines were seen in Financial, Insurance and Related Retail Services Occupations (6%), Other Health Practitioner Occupations (2%), with the heaviest seen in Food Service and Accommodation Occupations with a 16% decline, reflecting the impact of Covid-19 (Table 2.4)

▼ Figure 58 Retail Trade and Retail Services Jobs in Stony Plain



Source: EMSI Analyst, 2022

4.2.5 Retail Assessment Summary and Conclusion

The preceding information and data were agglomerated to arrive at a synopsis of the current state of the retail trade area (tables 2.5 and 2.6 in Appendix E).

As a result, the retail trade and retail service categories in the retail trade area (RTA) were categorized in terms of growth potential, which was determined in consideration of the number of business licenses in relation to establishments, employment concentration or location quotient, the proportion of in-region expenditure, and the amount of overall expenditure. Categories that do not have a strong presence in the retail trade but are well established elsewhere in Stony Plain are also highlighted to encourage complimentary recruitment activity in retail initiatives.

Current State	Categories
Established in RTA with some growth potential High concentration and in-market expenditure could reflect potential saturation	Food and beverage stores Motor vehicle /parts dealers Traveler accommodation Depository credit intermediation Automotive repair/ maintenance Personal care services
Established in RTA with growth potential High overall expenditure with leakage out of the region	Miscellaneous store retailers Health/personal care stores Furniture/home furnishings stores Full & limited-service restaurants Pet care (except veterinary) services Activities related to credit intermediation
Not established in RTA with growth potential Low concentration in the RTA and Stony Plain High leakage and overall expenditure	Electronics/appliance stores Building material/garden equipment General merchandise stores Clothing/clothing accessories stores Sporting goods, hobby, books, music stores
Not established in RTA Established elsewhere in Stony Plain High in-market expenditure High concentration Limited/no presence in the retail trade area	Non-store retailers Agencies, brokerages and other insurance-related activities Accounting, tax preparation, bookkeeping and payroll services Veterinary services Travel arrangement and reservation services Other schools and instruction Offices of other health practitioners Child daycare services Other amusement and recreation industries Dry cleaning and laundry services

The retail trade area can capitalize on current retail trends as elaborated on in the External Trends Analysis section:

- ▶ There is a strong representation of local and regional businesses. Many Canadians are buying local or made-in-Canada products
- ▶ Categories such as selling used or discounted products have a presence with strong growth in this segment forecasted
- ▶ The physical configuration lends itself to showrooming, flexible purchase options, easy returns, and solutions for supply chain issues

- ▶ Digitally native brands expand into brick-and-mortar with flexible market test options – short leases, events, pop-ups

The retail trade area can position itself as an asset to potential investors and in talent attraction:

- ▶ There are important amenities in proximity to the employment lands to serve employee needs
- ▶ Day to day services such as pet care, child daycare and to a lesser extent, personal banking with three of the five banks, automotive repair, and optometrists have a significant presence in the area
- ▶ Also of note are the number of hotels, with five of the eight in Stony Plain within the retail trade area. These include international chains, which is beneficial for investors for on-site visits

In conclusion, the retail trade area is a significant component in the study area economy, with business licenses comprising 171 or 61.3% of the 279 identified. Retail trade and services in Stony Plain have proven to be robust in the face of Covid-19, with Retail Trade being the 2nd highest employer and the 2nd highest in employment growth between 2016-2022 (2-digit NAICS) with over 1,000 individuals in relevant occupations in Stony Plain. While it was not possible to obtain retail expenditure in the retail trade area due to availability through EMSI Analyst, the \$17.1 million retail trade and retail services expenditure in Stony Plain indicates the retail sector's economic importance.

4.3 Data & Material Review – Summary of Findings

4.3.1 Materials Reviewed:

- | | |
|--|--|
| ▶ Support Local Video (Feb 10, 2022) | ▶ Tourism Master Plan |
| ▶ Carousel Ads | ▶ Tri Region Municipal Plan |
| ▶ LoKnow Proposal (ZAG CREATIVE) | ▶ Stony Plain Population and Employment Forecasts |
| ▶ Stony Plain Presentation (Investment Attraction + Shop Local Campaign) | ▶ Municipal Census Report 2019 |
| ▶ Stony Plain Grow Booklet 2021 | ▶ Fiscal Sustain Framework |
| ▶ Stop LA Magazine Ad | ▶ Environmental Stewardship Strategy |
| ▶ Target Sector Study & Marketing Plan | ▶ Environmental Master Plan |
| ▶ Strategic Plan 2022-2025 | ▶ Corporate Plan |
| ▶ Economic Development Strategic Plan (2019 Update) | ▶ Sector Brochure – Energy & Extraction |
| ▶ V2 STOPLA Shop Local | ▶ Sector Brochure – Healthcare & Related Services |
| ▶ Community Profile Guide | ▶ Sector Brochure - Shopping, Dining, Arts & Culture |
| ▶ Business Insight Program | |

4.3.2 Summary of Findings

- ▶ Marketing materials indicated above are well designed and visually appealing, with a suitable length and format along with notable benefits to businesses and residents. However, some of the messaging and/or the combining of value propositions was not entirely clear, for example:
 - Lower cost for housing, land and lease space should not be combined as they target different audiences and examples must be provided to validate/authenticate the claims
 - It is mentioned that the labour force is 26% - does this mean that the labour force 26% or has it grown by 26%, as the former is not strong while the latter is compelling
 - It is a stretch to call \$100K average household income support for local business, however, this does make sense as a consumer base Shopping, Dining, Arts & Culture
 - 725K jobs will not grow your business. Jobs are for job-seekers or residents, this should be labelled as 725K skilled workforce to draw on for companies
 - Low housing costs do not necessarily equate to a growing population, however it can support population growth
 - In general, there is a lack of empirical evidence or fresh data to support claims (e.g., when mentioning lower land costs, it must be stated in comparison to who/where and examples of those lower land costs should be provided)
- ▶ Mixed approach for investment attraction and shop local, but undetermined to what extent this approach has been successful for investment attraction while successful for shop local especially amongst the 25 – 34-year-old demographics. Key sectors identified to target are:
 - Business & Professional Services;
 - Energy & Extraction;
 - Healthcare & Related Services;
 - Local Food & Food Processing;
 - Shopping, Dining, Arts & Culture.
- ▶ It was noted in one study that the majority of new business starts are found within the Professional Services sectors, and as such should be considered in Stony Plain's approach to developing this opportunity
- ▶ Local Food & Food Processing, niches include: locally-grown and processed foods, artisanal or craft foods, nutraceuticals and functional foods, dietary food products, and pet foods as well as non-GMO and organic. However, the value proposition and specific evidence to support this is unavailable or unclear, aside from the locally grown food.
- ▶ Strategic Pillars identified:
 - Governance & Partners
 - Economic Opportunity
 - Supportive Infrastructure
 - Community Development

- Environmental Responsibility
- ▶ Stony Plain is projected to see annual employment growth ranging from 1.9 percent to 2.5 percent through 2044. This will bring total employment in the community from a current estimate of 5,800 jobs, to a range of 10,300 to 12,700 jobs
- ▶ This workforce is shared with Spruce Grove, and the two communities really represent a single pool of workers
- ▶ Mix of assets that align with creative entrepreneurs, however it is not explicitly clear which assets those are; for example, class A office space, coworking spaces, innovation spaces, makerspaces, etc.
- ▶ A claim is made that knowledge workers and entrepreneurs want to live and work in places that have interesting civic spaces and opportunities to explore new cultures etc. that is not backed by any evidence
- ▶ Strategy stresses a cross-sectoral approach
- ▶ Action Plan Summary – Existing Resources relevant to this body of work:
 - Foster Entrepreneurial ecosystem
 - Prioritize Main Street Streetscape Plan Implementation
 - Fibre Optic Network Improvement
 - Create Comparable ‘Infill Lands’ Policies for Industrial and Multiple Unit Residential Properties
 - Market and Promote Opportunities for Small and Medium-Sized Businesses
 - Business Retention and Expansion activities
- ▶ Action Plan Summary – Additional Resources relevant to this body of work:
 - Retail Market Analysis
 - Market the Readiness of Industrial and Highway Commercial Lands
 - Develop Lead Generation Network Connections for Stony Plain
- ▶ Transition to a knowledge economy
- ▶ Common theme/focus areas:
- ▶ Common Theme # 1 Importance of Diversifying the Economy and Business Base
 - There will be increasing demand for quality and stable employment for new and incoming residents.
 - Common Theme #2: Support for Knowledge-Based Economic Growth
 - Common Theme #3: Importance of Downtown as a Destination
 - Common Theme #4: Telling the World about Stony Plain
- ▶ Community/Stakeholder surveys – general findings:
 - One-third are considering expanding their current business operations in the next two years
 - Overall, most business owners agree that Stony Plain is a great place to own/operate a business
 - Dissatisfaction is mainly driven by lower than desired results in business attraction and downtown revitalization

- Expressed concerns about downtown improvement and investment attraction efforts
- Residents and business owners place the most importance on supporting the existing business community, creating more jobs and increasing local spending
- Residents and business owners believe that the health and wellness and retail sector have the strongest opportunity for economic advancement in the community
- ▶ Strengths according to both residents and business owners:
 - Significant sense of community and community support of local business; proximity to larger urban centres
 - Engaged local business community
 - Culture and creativity that exists in town + growing population
 - Availability of land and room to grow
- ▶ Challenges according to both residents and business owners:
 - State of the downtown/Main Street business area
 - Lack of investment in infrastructure
 - Better transportation options
 - Provincial economy
 - Increasing competition from big box stores
 - Business costs (e.g., land and rent costs)
- ▶ What challenges or barriers exist today:
 - Provincial control of highways and main road infrastructure
 - High speed internet connectivity
 - Speed at which the town moves on development applications
 - Spruce Grove is the first choice of national chains
 - Perception that Stony Plain is a small town that is not ready for larger companies
 - Permitted uses (zoning) within business parks is too wide-ranging
- ▶ Priorities of the Economic Development Strategy:
 - Increase amount of non-residential tax assessment
 - Create a 'business-to-business' mindset between town administration and the business community
 - Investment attraction, especially for the North Business Park
 - Look at possible greenfield developments along Highway 16A
 - More incentives for small businesses starting up in the community
 - Reach out to post-secondary institutions and develop partnerships/emerging technologies in partnership
- ▶ Strengths, Opportunities, Aspirations, Results (SOAR):

- Strengths - has good access to east-west highway infrastructure, particularly Highway 16A
- Strengths - Community has land for expansion
- Strengths - Economic Development Office provides good ongoing outreach to local businesses
- Opportunities – Explore outreach opportunities with post-secondary institutions
- Opportunities - Market Stony Plain as a retail destination for residents in EMR
- Opportunities – North Business Park has a proactive developer and available land
- Aspirations – Balanced commercial growth between greenfield/highway commercial areas and downtown revitalization
- Aspirations - Improved broadband infrastructure
- Aspirations - town gains control over highway infrastructure from Province
- Results - The town sees higher occupation of the North Business Park
- ▶ Competitive Advantages:
 - Western gateway to the Edmonton Metro Region
 - Housing costs compared to other regional communities
 - Available supply of serviced land within the industrial park with proactive developer
 - Adjacent rural/regional population within trade area
 - Thriving culture and arts sectors within the community
- ▶ Competitive Disadvantages:
 - Levels of education are less than the region's benchmarks
 - Lack of public transportation
 - Has not undertaken a broadband-type strategy
 - Commercial sector is less developed than other urban communities
 - The location of Spruce Grove between Stony Plain perceived as a barrier to investment

4.3.2.1 Town of Stony Plain – 2021 Shop Local Campaign

- ▶ Slogan 'Shop Hard' underpinned by town's "small-town appeal"
- ▶ Suggested lack of awareness on what kinds of businesses exist in Stony Plain
- ▶ Big box and chains draw away from local businesses
- ▶ Tactics – dedicated website, organic social media: sharing, recruiting businesses and public, user generated content, #hashtags, videos, grassroots, digital marketing (ads), swag, contests, radio
- ▶ Only results reported were 'Support Local video' was the town's top performing video in Q1 with 744 Engagements on Facebook, 225 'Likes' on Instagram, and 50 'Likes' and 8 shares on LinkedIn – (Town of Stony Plain Quarterly Report, March 2022)

4.3.2.2 Destination Shopping, Dining, Arts and Culture (2 pages)

- ▶ **Misleading title** – suggests it is targeting visitors, but statistics support small business attraction/development
- ▶ Statistics from 2016 Census
- ▶ Easy to eyeball stats presentation, attractive photos

4.3.2.3 Tourism Master Plan, May 2021

Assets overview

- ▶ Stony Plain's competitive advantage: combination of compelling culture, art and heritage offerings in an authentic small town, rural atmosphere with attractive complementary offerings close by
- ▶ Tourism asset inventory: Complementary attractions in nearby Spruce Grove and Parkland County. Home to compelling events, heritage assets, historic main street, unique shops, and an active community of artists and artisans.
- ▶ Lack of visitor and market ready experiences, not reached potential, underutilized downtown

Strategy & Tactics:

- ▶ **Four overarching focus areas:** Develop organizational capacity, Product development, Marketing & promotional development, Destination development
- ▶ Alberta-based visitors were responsible for majority of person-visits; but only responsible for 54% of total tourism expenditures. Highly seasonal 88% of visits are in spring and summer. Significant decline in visitation in 2020 due to the COVID-19 pandemic.
- ▶ Proximity to a large market of 1.3 million people. Target markets day-trippers from Edmonton, overnight visitors from Alberta, British Columbia, and other parts of Canada, event goers from Alberta, other parts of Canada, and international destinations, visiting friends & relatives - The VFR market accounts for 43% of all in-province trips by Albertans
- ▶ **Output so far:** Developed an implementation framework with organizational structure

4.3.2.4 Town of Stony Plain Population and Employment Forecast, 2018

Population projections

- ▶ 2027: Low – 1.0%, Medium 1.6%, High – 2%: 19,699, 20,476, 21,353
- ▶ 2037: Low – 1.0%, Medium 1.6%, High – 2%: 21,541, 23,971 26,845
- ▶ Employment-induced migration in high growth scenario - relatively more prime age workers migrate to Stony Plain

Employment Projections

- ▶ From a base of 7,445 in 2017, in medium growth scenario, total employment in Stony Plain is projected to reach 9,111 by 2027, and to 11,147 by 2037 representing an average annual growth rate of 2.0% over the forecast period
- ▶ Industries expected to post the greatest number of additional jobs through the forecast include Construction (599 jobs), Health care and social assistance (482 jobs), and Retail trade (458 jobs)
- ▶ Industries recording the highest rates of growth in this scenario include Agriculture, forestry, fishing and hunting (4.9%), Arts, entertainment and recreation (4.0%), and Wholesale trade (3.1%)

Community Profile (n.d.)

- ▶ **Transportation Links:** sets out comprehensive links across road, rail, air, ports – positioned well as strategic location ‘Gateway to the West’
- ▶ Tri-Municipal Labour Market Profile, 2017-Data from 2016 census: top occupations, young population: average age 39 in 2016
- ▶ Quality of life datasets: high level housing, recreation
- ▶ Lack of data evidence to back up ‘The spirit of innovation thrives’
- ▶ Why Choose Stony attributes block does not have links
- ▶ Easy to eyeball presentation and data; this piece could translate into a one-page version

5 THE PATHFORWARD

WHERE DO WE GO FROM HERE?

This context setting report has been prepared using available information from the town of Stony Plain, GIS Open data, Emsi Data, and Statistics Canada Census data. In short, there is a lot of information summarized here - so with all of this information it begs the question, where do we go from here?

The summarized information sets the context for understanding Stony Plain, including:

- ▶ Its historic and future projected urban development patterns;
- ▶ The policy and regulatory framework that is influencing commercial and industrial development;
- ▶ The demographics and future growth projections of the town;
- ▶ Existing businesses and places of employment; and
- ▶ The tax revenue generated by the mix of land uses, ultimately contributing to the financial sustainability of the town and the services it can offer its citizens.

Moving forward, this context setting report is what the project team will refer to when engaging with stakeholders, creating the Strength – Weaknesses – Opportunities – Threats analysis, recommendations report, and Highway Development Strategy. While this is a standalone document now, it will supplement the Highway Development Strategy by providing necessary background information for future readers to understand for the initial framework shaped the final strategy.

