# APPENDIX A

BRAGG CREEK DEMOGRAPHIC, HOUSING AND COMMERCIAL DEMAND ANALYSIS: 2015-2025

REVITALIZE BRAGG CREEK

# Bragg Creek Demographic, Housing and Commercial Demand Analysis: 2015 to 2025.

## FINAL REPORT

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# INTRODUCTION

This report presents the methodology and results of the following analyses performed by G. P. Rollo & Associates (GPRA) concerning the future demographic trends and housing and commercial space needs of the Hamlet of Bragg Creek, AB:

- Demographic Projection 2015 – 2030 (including population and age)
- Housing Demand Projection 2015 – 2030
- Retail Inventory
- Commercial Space Demand Projection 2015 – 2030

It also includes some discussion of housing affordability best practices. The purpose of these analyses and discussions is to inform the forthcoming policy and built-form design processes that will make up the remainder of the Bragg Creek Revitalization Plan. These projections of trends and requirements are also a necessary basis for any financial and pro forma analysis to determine the viability of commercial and residential developments in Bragg Creek in the near future.

In a community of such small size, projecting trends with a high degree of accuracy is difficult. We are confident that the results presented in this report are sound, and that we have employed rigorous and reasonable methods, but any projection is based on assumptions and subject to uncertainty, which we have attempted to state where appropriate. These projections should be treated as "best guesses", and as the basis for further investigation and discussion.

# RESIDENTIAL DEMAND FORECAST

## Population Projection

In order to produce a housing and commercial demand projection for Bragg Creek, GPRA first needed to generate a demographic projection reflecting both the size and age composition of the Hamlet's population for the period under consideration, namely 2015 to 2030. A number of resources and strategies exist for projecting population within a geographic boundary, including linear and exponential regression, shift-share analysis, and inference on the basis of regional location. However, most of these strategies rely on the assumption that future growth will resemble past growth, and all of them are much better suited to large areas with populations in the hundreds of thousands at least. By comparison, Bragg Creek has a current population of about 450 residents, making conventional population projection methods inadequate.

In the case of a highly populated area such as a region of 1,000,000 people, each additional 1% of growth represents 10,000 newcomers. For this reason, the relative growth rate of large areas tends to remain fairly stable over time, since there are economic and logistical barriers to huge fluctuations. For Bragg Creek, however, this same level of relative growth represents about 5 individuals. Consequently, relative growth in Bragg Creek could feasibly vary by huge margins, making any projection method unreliable. Compounding this issue is the matter of Bragg Creek's land use policy environment, which is in a period of transition that could substantially alter the Hamlet's population mix, residential offering, and commercial market. GPRA anticipates that the Hamlet's next 16 years of growth and change could be entirely different from its last 16 years, and since most projection methods derive future trends from past trends, they are not applicable here.

Unable to rely on convention population projection methods, GPRA turned to the community of local realtors for input, since subject matter expertise and personal experience can be just as informative as formal modelling methods. To give these conversations a starting point and basis upon which to build, GPRA first analyzed the last 20 years of growth trends based on the Canadian and Alberta Municipal Censuses as well as the next 10 years of Environics Research population projections for the following areas:

- The Hamlet of Bragg Creek
- Bragg Creek's environs, defined as the area that can be reached within a 20 minute drive from the Hamlet
- Rocky View County
- The Town of Canmore[1]

This research gave GPRA a range of reasonable growth scenarios to which the realtors added nuance and local insight. A number of themes emerged from these conversations, which are discussed later in this report. But on the subject of expected growth, the realtors opine that the Hamlet's growth or decline will depend largely on constructing the right mix of affordable and attractive homes, making sure especially to provide smaller and more affordable options than what are currently available. If the right homes are built, the realtors agree, population growth will occur. Effective flood mitigation policies were also mentioned as a prerequisite for growth. The realtors ventured a number of guesses regarding the Hamlet's population over the next 16 years, with projections ranging from 900 residents in 2030 to as many as 1500. Some realtors even expressed the opinion that the Hamlet's population would be limited only by housing availability, and that saturation of the market would not be a concern.

As the basis of our demographic projection for Bragg Creek, GPRA selected a growth rate falling within the range suggested by the realtors, but still fairly close to the 3% per annum rate observed in Rocky View County between 1996 and 2013. **Our model projects that the population of Bragg Creek will double in the next 15 years, growing from 454 residents is 2014 to a total population of 908 residents in 2030.** This produces an average annual growth rate of 4.4%. However, GPRA also assumes that Bragg Creek will grow more rapidly at first as latent demand is met with new supply, and then more slowly near the end of the projection period as the market normalizes. Therefore, rather than projecting linear growth, our model projects that the growth rate will shift gradually from an initially high rate of 6.6% per year to a more realistic long-term growth rate of 2.2% per year in 2030. It is important to note that although 6.6% annual growth would be exceptionally high for a large area in Alberta, in this context it represents only 30 new residents in the first year. The projected total population of Bragg Creek from 2015 to 2030 is presented in Figure 1.

[1] The Town of Canmore is included because that community was mention on multiple occasions as a role model for Bragg Creek's future development.

Figure 1: Projected population of Bragg Creek, AB

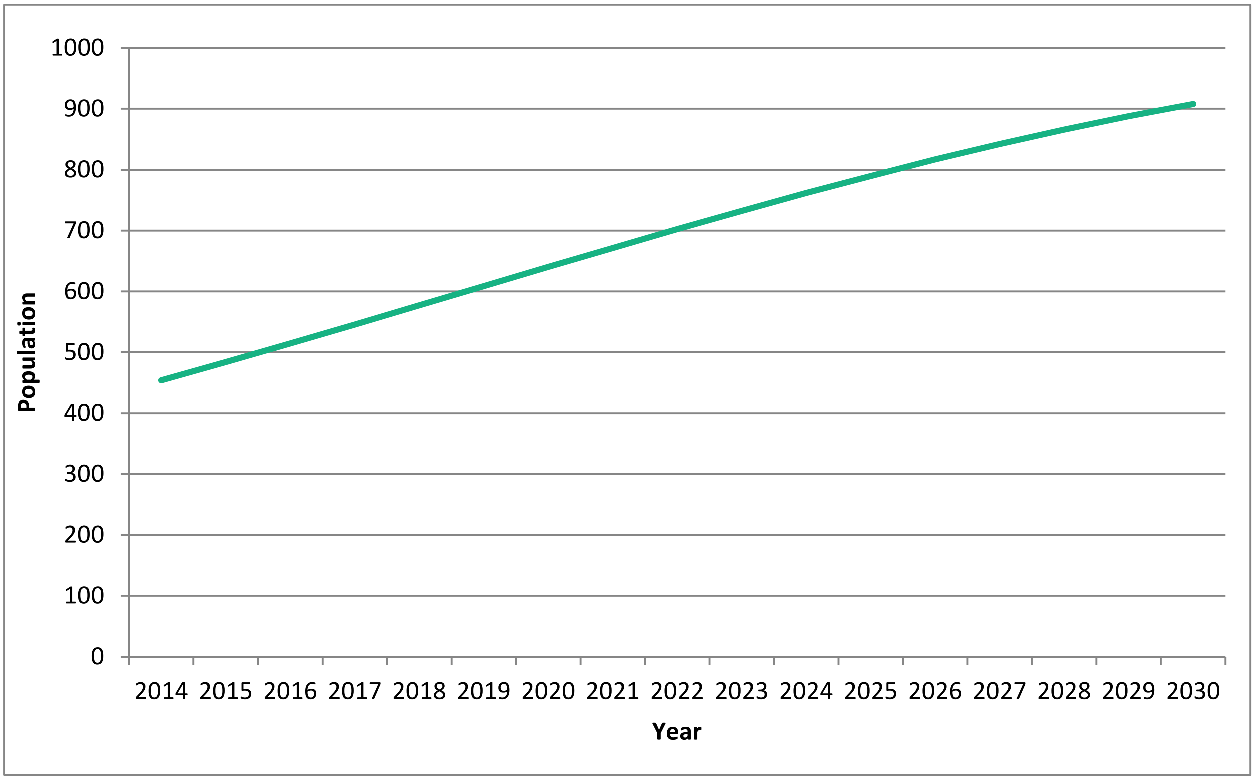



Figure 1 shows that the projected pattern of growth in Bragg Creek is nearly linear, with slightly more growth occurring earlier than later.

## Age Composition Projection

Residents at different life stages tend to inhabit different types of dwelling. It is therefore critical when generating housing models to possess not only a projection of the overall number of newcomers, but also a projection of the age composition of the newcomers. To produce a projection of the age composition of Bragg Creek's newcomers over the next 16 years, GPRA first divides the population into the following discrete age cohorts:

- Aged 24 or younger
- Aged 25 – 34
- Aged 35 – 44
- Aged 45 – 54
- Aged 55 – 64
- Aged 65 – 74
- Aged 74 or older

A projection is then made of how each cohort's share of the pool of newcomers will change between 2015 and 2030. One preferred method for this type of projection is to assume a linear rate of change in the population shares of the age cohorts. For example, if the 25 – 34 cohort makes up 6% of the population in 2001 and 5% in 2006, it is projected that it will make up 4% of the population in 2011, continuing the trend in a linear manner. This method has the advantage of basing its projections on existing trends, and always produces cohort estimates that add up to the projected population total. Note that although each cohort's *share* of the population changes linearly, each cohort's total population does not necessarily change at a linear rate. Rather, the totals for each cohort will depend on the projected population total. In the case of this population model, the total number of newcomers for a given year is determined in the previous section and presented in Figure 1.

GPRA applied the method just described to historical data from the Canadian Census and age composition projections from Environics Research in order to identify trends in the age compositions of the following areas:

- The Hamlet of Bragg Creek
- Bragg Creek's environs, as defined above.
- Rocky View County
- The Calgary Metropolitan Area

An age composition trend was also calculated in which Bragg Creek's age composition changes over the next 16 years to resemble the age composition of Canmore.

It is assumed that most of the newcomers to Bragg Creek during the projected period will come from the Calgary Metropolitan Area or from elsewhere in Rocky View County, so it is reasonable to assume that the age composition of the Hamlet's new residents will resemble the age composition of those areas' residents. It is also assumed that the age composition of Bragg Creek will become more similar to the age composition of Canmore today. Taking the average of the four age composition projections listed above as well as the Canmore-based projection produces a realistic age composition projection for Bragg Creek's newcomers, which is presented in Figure 2 and Table 1.

Figure 2: Projected age composition of Bragg Creek's newcomers

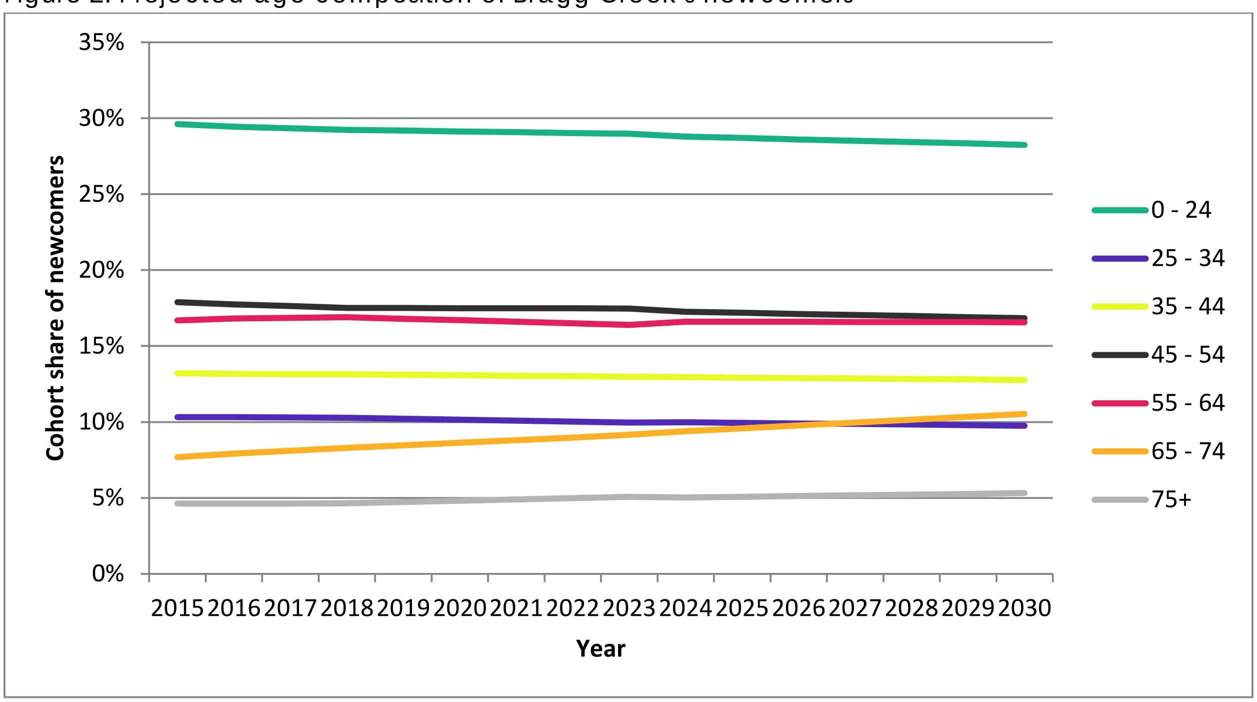


Table 1: Projected age composition of Bragg Creek's newcomers

| | 0 – 24 | 25 – 34 | 35 – 44 | 45 – 54 | 55 – 64 | 65 – 74 | 75+ |
|---|---|---|---|---|---|---|---|
| Share in 2015 | 29.6% | 10.3% | 13.2% | 17.9% | 16.7% | 7.7% | 4.6% |
| Share in 2030 | 28.2% | 9.7% | 12.8% | 16.8% | 16.6% | 10.5% | 5.3% |
| Absolute shift[2] | -1.4% | -0.6% | -0.4% | -1.1% | -0.1% | 2.9% | 0.7% |
| Relative shift[3] | -4.6% | -5.5% | -3.3% | -6.0% | -0.7% | 37.1% | 15.0% |

The projected age composition of newcomers remains fairly constant over the projected period, with most cohorts' shares shifting by less than 1.5%, and the biggest shift in share – namely the increase in newcomers between the ages of 65 and 74 – only coming to 2.85%. However, since this cohort makes up only 7.7% of the newcomers in 2015 and 10.5% of the newcomers in 2030, the proportion of newcomers in this cohort is actually 37.11% larger in 2030 than it is in 2015. This difference between the absolute shift in newcomer share and the relative shift in newcomer share is captured by the bottom two rows of Table 1.

The overall trend in the projected age composition of newcomers is simple: The proportion of newcomers aged 64 or younger decreases, and the proportion of newcomers aged 65 or older increases. This is unsurprising as it reflects current and anticipated trends in Calgary, in Alberta, and throughout Canada.

Having generated a population projection for Bragg Creek from 2015 to 2030 as well as a projection of age composition of the newcomers for the same period, it is now possible to combine these two projections to create a projection of total newcomers by age. Table 2 presents the number of new residents in each of three time periods for each of the previously discussed age cohorts.

Table 2: Projected number of newcomers to Bragg Creek by age cohort and time period

| | 0 – 24 | 25 – 34 | 35 – 44 | 45 – 54 | 55 – 64 | 65 – 74 | 75+ | Total |
|---|---|---|---|---|---|---|---|---|
| 2015 - 2019 | 45 | 16 | 20 | 27 | 26 | 13 | 7 | 155 |
| 2020 - 2024 | 44 | 15 | 20 | 27 | 25 | 14 | 8 | 153 |
| 2025 - 2030 | 42 | 14 | 19 | 25 | 24 | 15 | 8 | 146 |

The population of Bragg Creek is projected to increases by 155 residents between 2015 and 2019, by 153 residents between 2020 and 2024, and by 146 residents between 2025 and 2030. Of this growth in population, less will consist of young people as time goes on, and more of seniors.

## Housing Demand by Structure Type

The next step in this analysis is to use the projected demographic composition of Bragg Creek's new residents (Table 2) to create a projection of demand for new housing for the next 16 years, including not only the number of new housing units required each year, but also the distribution of those units between a number of housing types. GPRA uses the Primary Household Maintainer method to project housing demand based on demographic data.

[2] The difference in this cohort's share of newcomers between 2015 and 2030

[3] The difference in this cohort's share of newcomers between 2015 and 2030, relative to the size of its share in 2015

A *primary household maintainer* is the individual in a household most responsible for paying housing costs. Statistics Canada provides a breakdown of Primary Household Maintainers by age group and structure type of dwelling. This information tells us what housing types are preferred by households with heads of various ages. The most current available housing data categorized by age of household head comes from the 2011 National Housing Survey. By way of example, the 2011 maintainer data for Rocky View County is presented in Table 3.

Table 3: Number of Primary Household Maintainers by age and structure type, Rocky View County, 2011

| | 0 – 24 | 25 – 34 | 35 – 44 | 45 – 54 | 55 – 64 | 65 – 74 | 75+ | Total |
|---|---|---|---|---|---|---|---|---|
| **Single-detached house** | 105 | 675 | 2,285 | 3,775 | 2,780 | 1,150 | 605 | 11,375 |
| **Apartment in 5+ storey building** | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **Movable dwelling** | 0 | 20 | 0 | 75 | 0 | 40 | 0 | 135 |
| **Semi-detached house** | 0 | 20 | 15 | 75 | 105 | 150 | 55 | 420 |
| **Row house** | 0 | 30 | 0 | 0 | 0 | 35 | 35 | 100 |
| **Apartment in duplex** | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **Apartment in 1 – 4 storey building** | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **Other single-attached house** | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total** | 105 | 745 | 2,300 | 3,925 | 2,885 | 1,375 | 695 | **12,030** |

Table 3 shows that nearly all of the dwellings in Rocky View County are single-detached houses, although there are a number of movable dwellings, semi-detached houses, and row houses. Table 3 also shows that many primary household maintainers are between the ages of 35 and 64, with significantly fewer primary household maintainers in the younger and older cohorts.

Dividing the number of people of a specific age cohort who are primary household maintainers by the total number of people in that age cohort produces the *age-specific household maintainer rate*. This number represents that age cohort's propensity to be the primary maintainer of a household. To demonstrate, when the items in Table 3 are divided by the population totals for their age cohorts, the 2011 Age-specific Household Maintainer Rates for each housing structure type are produced. These are presented in Table 4.

Table 4: Age-specific household maintainer rates by structure type, Rocky View County, 2011

| | 0 – 24 | 25 – 34 | 35 – 44 | 45 – 54 | 55 – 64 | 65 – 74 | 75+ |
|---|---|---|---|---|---|---|---|
| **Single-detached house** | 0.86% | 25.71% | 48.98% | 51.68% | 48.86% | 45.01% | 44.00% |
| **Apartment in 5+ storey building** | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| **Movable dwelling** | 0.00% | 0.76% | 0.00% | 1.03% | 0.00% | 1.57% | 0.00% |
| **Semi-detached house** | 0.00% | 0.76% | 0.32% | 1.03% | 1.85% | 5.87% | 4.00% |
| **Row house** | 0.00% | 1.14% | 0.00% | 0.00% | 0.00% | 1.37% | 2.55% |
| **Apartment in duplex** | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| **Apartment in 1 – 4 storey building** | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| **Other single-attached house** | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| **Total** | 0.86% | 28.38% | 49.30% | 53.73% | 50.70% | 53.82% | 50.55% |

Table 4 can be interpreted simply: Each cell is the proportion of that cohort's population who are primary household maintainers in that structure type. For example, 25.71% of individuals between the ages of 25 and 34 are the primary maintainers of households living in single-detached houses. Table 4 shows that in Rocky View County in 2011, roughly half of all residents aged 35 or older were the primary maintainers of their households. Among residents between the ages of 25 and 34, 28.38% performed this role, and of residents aged 24 or younger, less than 1% were primary household maintainers.

Age-specific household maintainer rates such as those presented in Table 4 can be used to directly convert a demographic projection such as the one presented in Table 2 into a projection of housing demand. To generate a projection of age-specific household maintainer rates for newcomers to Bragg Creek for the next 16 years, GPRA used data from the 2006 Canadian Census and the 2011 National Housing Survey to construct tables of maintainer rates for those two years in Rocky View County and the Calgary Metropolitan Area. Table 4 is one of these four tables.

Maintainer rates are not constant over time; the propensity of one age group to maintain a household depends on a number of macro-economic factors such as the price of housing and the level of employment in the area. GPRA charted the five-year trend in fluctuating maintainer rates, and projected annual maintainer rates for Rocky View County and the Calgary Metropolitan Area based on the assumption that change will continue to occur in maintainer rate trends, but that the amount of change between 2011 and 2030 will be the same as the amount of change that occurred between 2006 and 2011. In other words, these projections assume that current trends will continue, but not as rapidly as they have in recent years. This approach is justified because although we cannot assume current trends will stop, it is unreasonable to draw a 20-year linear trend from 6 years of data. This approach is a defensible compromise between linear extrapolation and stasis. GPRA also generated a hypothetical projection of maintainer rates in which it is assumed that Bragg Creek's maintainer rates shift between 2011 and 2030 to become less like those of Rocky View County and more like those of Canmore.

Assuming that most of the newcomers to Bragg Creek in the next 16 years will be moving from the Calgary Metropolitan Area or from elsewhere in Rocky View County, and also assuming that Bragg Creek's maintainer rates will become more similar to those of Canmore, GPRA generated a maintainer rate projection for Bragg Creek's newcomers that is equal to the average of the three maintainer rate projections defined above. It projects a linear change in maintainer rates between 2015 and 2030, shifting gradually from the rates shown in Table 5 to those shown in Table 6.

Table 5: Projected household maintainer rates of newcomers to Bragg Creek, by structure type, 2015

| | 0 – 24 | 25 – 34 | 35 – 44 | 45 – 54 | 55 – 64 | 65 – 74 | 75+ |
|---|---|---|---|---|---|---|---|
| Single-detached house | 0.67% | 13.68% | 25.28% | 29.87% | 28.28% | 24.65% | 23.36% |
| Apartment in 5+ storey building | 0.21% | 1.62% | 0.88% | 1.20% | 1.65% | 1.04% | 1.62% |
| Movable dwelling | 0.00% | 0.23% | 0.04% | 0.35% | 0.11% | 0.58% | 0.13% |
| Semi-detached house | 0.08% | 1.48% | 1.39% | 1.56% | 2.16% | 3.31% | 2.68% |
| Row house | 0.25% | 2.68% | 2.26% | 1.82% | 1.81% | 3.72% | 3.04% |
| Apartment in duplex | 6.02% | 10.97% | 12.58% | 12.35% | 11.48% | 9.47% | 0.56% |
| Apartment in 1 – 4 storey building | 2.20% | 5.43% | 3.31% | 3.03% | 3.47% | 4.67% | 3.88% |
| Other single-attached house | 0.04% | 0.04% | 0.08% | 0.12% | 0.17% | 0.13% | 0.08% |
| Total | 2.09% | 33.95% | 49.32% | 53.26% | 52.05% | 53.06% | 50.67% |

Table 6: Projected household maintainer rates of newcomers to Bragg Creek, by structure type, 2030

| | 0 – 24 | 25 – 34 | 35 – 44 | 45 – 54 | 55 – 64 | 65 – 74 | 75+ |
|---|---|---|---|---|---|---|---|
| Single-detached house | 0.34% | 8.91% | 18.36% | 25.09% | 24.77% | 20.48% | 20.76% |
| Apartment in 5+ storey building | 0.17% | 1.82% | 0.96% | 1.35% | 1.51% | 0.74% | 1.14% |
| Movable dwelling | 0.00% | 0.03% | 0.02% | 0.08% | 0.09% | 0.16% | 0.11% |
| Semi-detached house | 0.07% | 2.36% | 2.66% | 2.67% | 3.48% | 3.66% | 2.56% |
| Row house | 0.52% | 5.76% | 5.19% | 3.61% | 3.33% | 6.59% | 5.45% |
| Apartment in duplex | 5.57% | 11.34% | 12.75% | 12.89% | 12.40% | 9.56% | 0.51% |
| Apartment in 1 – 4 storey building | 2.72% | 9.94% | 5.73% | 5.29% | 5.82% | 6.99% | 4.88% |
| Other single-attached house | 0.03% | 0.02% | 0.08% | 0.09% | 0.17% | 0.11% | 0.07% |
| Total | 2.35% | 37.19% | 50.92% | 54.06% | 55.37% | 51.68% | 48.95% |

As shown in Tables 5 and 6, GPRA projects that maintainer rates among newcomers to Bragg Creek will fluctuate slightly as present economic trends continue, but that no age-specific household maintainer rates shift by more than 4%.

Combining the demographic projection presented in Table 2 and the maintainer rate projection presented in Tables 5 and 6 allows us to project the level of demand in Bragg Creek for new housing of each structure type over the next 16 years. This is presented in Table 7.

Table 7: Projected demand for new housing in Bragg Creek by type and time period

| | Single-detached house | Attached house[4] | Apartment | Total |
|---|---|---|---|---|
| 2015 - 2019 | 25 | 10 | 15 | 50 |
| 2020 - 2024 | 25 | 15 | 15 | 55 |
| 2025 - 2030 | 22 | 13 | 15 | 50 |
| Total | 72 | 38 | 45 | **155** |

As presented in Table 7, GPRA projects that about half of the demand for new housing in Bragg Creek in the next 16 years will be for single-detached houses, of which about 72 will be required.

[4] Includes semi-detached houses, row houses, and all other types of attached houses

About 45 apartments will be required, and about 38 attached houses such as row houses or duplexes. No demand is projected for movable homes or high-rise apartments.

This projection only looks at new residents and newly constructed housing in Bragg Creek. It is assumed that all existing housing in the Hamlet is maintained for the duration of the projection period, or replaced in-kind. At the time of the 2011 Canadian Census, there were 227 single-detached houses in Bragg Creek, 5 row houses, and zero apartments. Combining these numbers with the projected new unit counts produces the overall 2030 housing supply presented in Table 8.

Table 8: Projected total demand for housing in Bragg Creek by type and time period

| | Single-detached house | Attached house[4] | Apartment | Total |
|---|---|---|---|---|
| **Existing** | 227 | 5 | 0 | 232 |
| **Constructed 2015 - 2019** | 25 | 10 | 15 | 50 |
| **Constructed 2020 - 2024** | 25 | 15 | 15 | 55 |
| **Constructed 2025 - 2030** | 22 | 13 | 15 | 50 |
| **Total** | 299 | 43 | 45 | **387** |

This housing demand projection captures only the absolute numbers of residential units needed; to this quantitative estimate, GPRA would add a number of qualitative points:

- The population of senior citizens in Alberta is expected to increase much more rapidly than other demographic groups. To accommodate this portion of the population, Bragg Creek's market should offer supportive housing or retirement home options.
- Apartments and attached houses do not fit the current low-density style of development found in Bragg Creek. However, these more compact forms of housing are often preferred by seniors, and they are also an important element in creating a vibrant commercial district, as they can provide housing to workers who would otherwise be unable to afford living in the Hamlet.
- Generally, offering a mix of housing types and tenures (rental versus ownership) contributes to social mix, which makes a community more vibrant.

# COMMERCIAL DEMAND FORECAST

## Bragg Creek Retail Inventory

In January of 2015, GPRA conducted a driving and walking retail inventory that consisted of all retail and service commercial establishments in the Hamlet of Bragg Creek, as well as a high-level competitive assessment of major regional shopping destinations. The visual data gathering in the Hamlet was then supplemented by assessment data provided by Rocky View County. In cases where data sets could not be reconciled, a reasonable estimate of space was made using desktop mapping tools (i.e. Google Earth, Google Streetview).

Retail in the Hamlet is typified by aging strip centres, with the largest (Bragg Creek Shopping Centre) anchored by a small community grocery store. Vacancy rates are high (9.1% overall and nearly 20% at the main mall), and the overall appearance and tenant mix, and apparent lack of re-investment (particularly in the main mall property) suggests that the centres either suffer from low sales, or lack of growth and change in the area has fostered a complacency amongst some property owners.

Overall the Hamlet has an estimated 153,000 square feet of retail and service commercial space in 2015, including automotive-related space. This estimate does *not* include office space for businesses that act in more of a 'business-to-business' role (e.g. graphic design, architecture, engineering), but does include both personal and professional service commercial businesses. Included within this inventory is an estimated 14,000 square feet of vacant storefront space, much of it located in the Bragg Creek Shopping Centre.

The heart of the Hamlet is comprised of a cluster of 5 mall properties which together account for nearly 100,000 square feet of space (65% of Hamlet total). Following is a breakdown of the estimated size of each of these properties:

| | | |
|---|---|---|
| 1. | **Bragg Creek Shopping Centre:** | **~47,000 sq.ft.** |
| 2. | **Bragg Creek Village Centre:** | **~25,000 sq.ft.** |
| **3.** | **Trading Post Mall:** | **~11,000 sq.ft.** |
| **4.** | **Old West Mall:** | **~8,500 sq.ft.** |
| **5.** | **Front Porch Square:** | **~5,500 sq.ft.** |
| | **TOTAL:** | **~97,000 sq. ft.** |

The balance of retail, service and food & beverage is largely located along Balsam Avenue west to River Drive North, and scattered along White Avenue (Heritage Mile) west to the Elbow River. White Avenue commercial is largely a mix of food & beverage, services and local artisans offering various goods in the jewelry, apparel, accessories and home furnishings/accessories categories. Balsam Avenue contains some stand-alone restaurant space as well as services like Bragg Creek Physiotherapy and Bragg Creek Animal Hospital.

The largest retail category in Bragg Creek is Food & Beverage, accounting for 43,000 square feet or 28% of total. This is followed by Services (both personal and professional) which account for nearly 35,000 square feet (23% of total), and Home Furnishings & Accessories at 19,000 square feet (12% of total).

Grocery-related retail space takes up nearly 7% of total space.

Table 9 presents a breakdown of the Hamlet's commercial inventory, categorized by commercial type.

Table 9: Bragg Creek Commercial Inventory

| Retail Categories | Sq.ft. |
|---|---|
| **Convenience Goods & Services** | **50,535** |
| Grocery & Specialty Food | 10,200 |
| Pharmacy | 1,235 |
| Alcohol & Tobacco | 4,300 |
| Services | 34,800 |
| **Comparison Goods** | **43,700** |
| Apparel, Footwear & Fashion Accessories | 4,900 |
| Cosmetics, Health, Bath & Beauty | 2,200 |
| Jewelry & Accessories | 1,100 |
| Home/Portable Electronics & Appliances | 500 |
| Multimedia, Books & Music | 500 |
| Home Furnishings & Accessories | 19,000 |
| Home Improvement | 5,500 |
| Toys / Hobbies / Pets / Gifts | 4,500 |
| Sporting & Recreational Goods | 5,500 |
| **Food & Beverage** | **43,000** |
| Restaurants | 38,000 |
| Alcohol Sales - Pubs / Lounges / Restaurants | 5,000 |
| **Automotive Goods & Services** | **2,000** |
| **Vacant** | **14,000** |
| **Total** | **153,235** |
| **Vacancy Rate** | **9.1%** |

- Much of the **grocery / specialty foods** inventory in Bragg Creek is located at the nearly 7,000 square foot Bragg Creek Family Foods which anchors the Bragg Creek Shopping Centre. The balance of space in this category includes both basic and niche specialty grocery items at the Moose Mountain General Store, Bragg Creek Health Foods, the Bragg Creek Trading Post, and the Oil & Vinegar Market.
- The **pharmacy** is located at IDA Health Care & Pharmacy in the Village Centre. The total square footage of this location has been subdivided into component categories to

account for the fact that only a portion of the floor area is dedicated to sale of pharmaceuticals.

- The **Alcohol & Tobacco** category consists of two liquor stores: Creekers Liquor (2,000 sq.ft.), and Spirits West Liquor (2,300 sq.ft.).
- The **Services** category is broad, and in Bragg Creek includes the following:
  - Realtor offices
  - Law offices
  - Financial services
  - Chiropractic & physiotherapy clinics
  - Dental clinic
  - Medical clinic
  - Animal hospital
  - Car wash / service station
  - Yoga studio
  - Photography studio

  Most services are located within the core of the Hamlet, with the exception of a few businesses scattered along the Heritage Mile.
- **Apparel, Footwear & Fashion Accessories** is mostly niche and specialty goods, and can be found primarily at the following businesses:
  - The River Dragon Fly
  - Brainface Apparel
  - Bragg Creek Leather Shop
  - Crabapple Cottage Ladies Wear
  - The Creeky Door

  There is limited apparel available in a few other businesses, as well as sporting-related apparel which is classified here under the sporting goods category.
- **Cosmetics, Health, Bath & Beauty** products (i.e. "Personal Care") is found primarily at 4 businesses: Bragg Creek Trading Post, the Moose Mountain General Store, IDA Health Care & Pharmacy, and the main grocery store.
- **Jewelry & Accessories** – primarily at River Dragon Fly and Creeky Door, although limited jewelry is available at other shops.
- **Electronics & Appliances** – limited supply, mostly at Moose Mountain General Store.
- **Multimedia, Books & Music** – scattered at a few of the tourism-oriented businesses, with books primarily at The Best Little Wordhouse in the West.
- **Home Furnishings & Accessories** – this is a broad category that includes many businesses creating and/or selling unique arts and crafts. Altogether, there are 12 businesses in Bragg Creek that sell goods in this category.

- **Home Improvement** – home improvement (including garden) related products are available primarily at the Moose Mountain General Store and Country Hardware.
- **Toys/Hobbies/Pets/Gifts –** this broad category encompasses businesses such as My Favourite Store, Belcourt Pet Spa & Supplies, The Best Little Wordhouse, and others.
- **Sporting & Recreational Goods** – primarily the Hamlet's cycle shops (Bike Bros., Cycle 22x), with some limited goods at the general store.
- **Food & Beverage** – the large amount of space in this category is a somewhat misleading figure given that there are 3 very large establishments that account for nearly 40% of the floor space inventory. These are: Bavarian Inn Restaurant (3,000 sq.ft.), Italian Farmhouse Restaurant (4,100 sq.ft.), and the BBQ Steakpit (nearly 9,000 sq.ft.).
- **Automotive** – accounts for automotive goods available at the Shell Station (Trading Post).
- **Vacant** – the vast majority of vacant space is located at Bragg Creek Shopping Centre, which has a 20% vacancy rate.

## Competitive Retail Locations

Bragg Creek's proximity to the City of Calgary, and the frequency of work-related trips to and from Calgary by Bragg Creek area residents, means that Calgary's extensive retail offerings have the largest draw on local dollars. The following is a list of major regional shopping centres and nodes that are most readily accessible for Bragg Creek-area residents, via either Highway 22 (south & central south Calgary) or Highway 8 (west and central Calgary):

Table 10: Calgary Retail Locations of Influence for Bragg Creek Area

| Area | Centre / Node | GLA (sq. ft.) | Driving Distance to Bragg Creek (km) |
|---|---|---|---|
| South | Shawnessy Town Centre | 1,400,000 | 41 |
| Central South | Deerfoot Trail & Heritage Drive | 1,600,000 | 48 |
| Central South | Southcentre Mall | 950,000 | 51 |
| Central | Chinook Centre | 1,200,000 | 41 |
| West | RioCan Signal Hill / West Hills | 1,180,000 | 33 |
| West | Aspen Landing | 220,000 | 32 |
| West | Westbrook Mall | 400,000 | 40 |

The other areas that have a competitive draw are the Cities of Cochrane to the north and Okotoks to the south. Anecdotally, we understand that many Bragg Creek area residents make shopping trips to Cochrane, or do shopping in the City as part of leisure and recreation-related trips. Cochrane has large grocery and Canadian Tire-anchored mall properties along Fifth Avenue, and a high variety of goods, services and food & beverage establishments in the traditional, walkable town centre. Okotoks' major draws are the Costco and related home and fashion retail clusters in the City's southeast, as well as Centennial Village and related strip commercial along Southridge Drive.

## Trade Area Delineation

Delineation of applicable trade areas is the first step in determining the market potential for new commercial space in a given area. Factors that are considered in delineation of a trade area include:

- Existing and future population bases
- Drive times
- Competitive locations
- Physical and psychological barriers.

A primary trade area (PTA) is the area from which we would expect the largest portion of sales to be drawn. The size of a PTA varies considerably from place to place, based on the above-mentioned variables.

One or more secondary trade areas (STA) are typically areas adjacent to and beyond the PTA from which additional shopping trips to the retail area will originate. The main difference when considering demand potential from the PTA and the STA is that the STA usually has a greater number of competitive influences, and is a longer distance from the subject site, so capture rates tend to be lower.

In addition to the PTA and STA generating expenditures, inflow from other areas (including seasonal tourist inflow) also contributes to the customer base of local retailers. In Bragg Creek, we would expect spending inflow to be primarily associated with weekend recreational trips from the Calgary area, as well as drive-by traffic on Highway 22.

### Drive Times

The map presented in Figure 3 represents the first step in defining the trade areas that will be used for modelling spending potential and associated net new retail and service commercial space supportable in Bragg Creek. Figure 3 shows a 15-minute drive-time from the intersection of Burnside Drive and Balsam Avenue (green), a 20 minute drive-time (blue) and a 25 minute drive-time (red). Table 11 shows summary demographic information relating to these zones from the 2013 Environics Analytics Estimates & Projections database.

Figure 3: 15-minute, 20-minute, and 25-minute driving distances from Bragg Creek

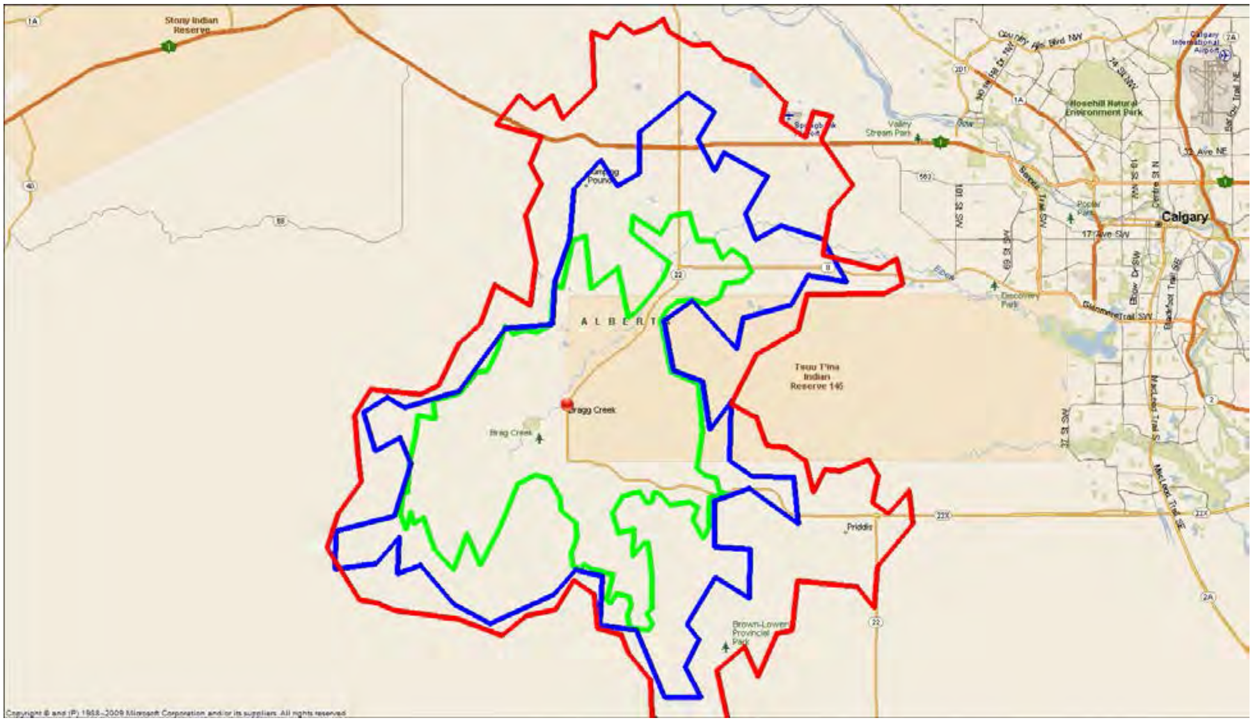



Table 11: 2013 Environics Analytics Demographic Estimates for driving distance areas[5]

| | 15-minute drive | 20-minute drive | 25-minute drive |
|---|---|---|---|
| Total Population | 3,368 | 4,155 | 7,823 |
| Median Age | 44.5 | 45.2 | 45 |
| Occupied Dwellings | 1,196 | 1,489 | 2,723 |
| Population per Household | 2.8 | 2.8 | 2.9 |
| Average Household Income | $ 220,353 | $ 220,643 | $ 289,107 |

As noted in Table 11 above, in 2013 the estimated population within a 15-minute drive of the Hamlet was nearly 3,400. Within the 20- and 25-minute drive time zones the estimated populations were 4,155 and 7,823 respectively.

## Primary Trade Area

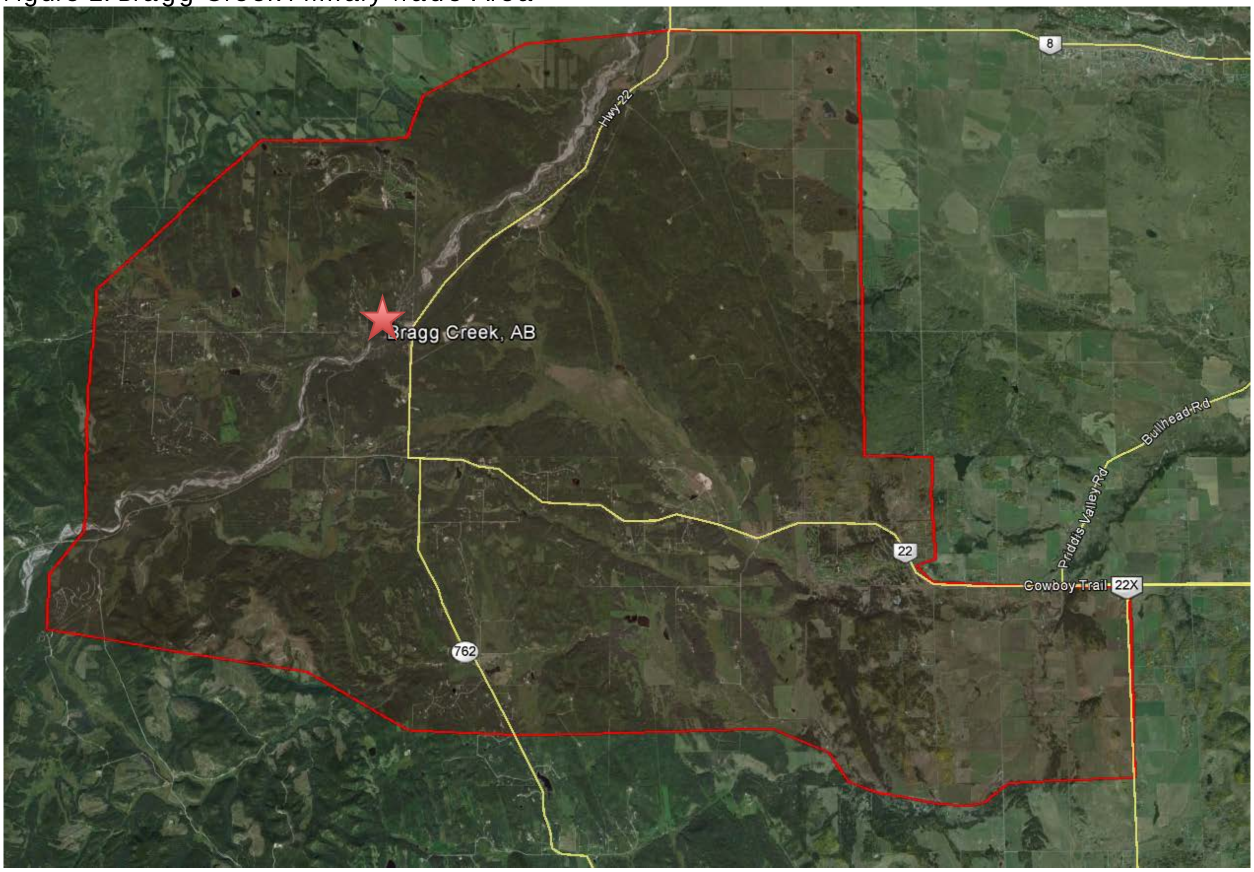
The PTA was delineated using the 15 minute drive-time zone as a starting point, with the boundaries of the zone adjusted based on the locations of competitive retail.

To the north, the 15-minute drive time zone was used as the basis of the boundary, as Highway 8 appeared to be a logical northern bound given distances from that point south to Bragg Creek and north to Cochrane. To the south and southeast the 25-minute drive time was used as the main guide for boundary delineation given the relative distance between residences in this area and retail nodes further to the east and southeast (i.e. Okotoks, High River, and Shawnessy Town Centre in south Calgary). And to the west, there was little variation between the bounds of the

[5] Source: Environics Analytics Estimates & Projections, 2013

15-, 20- and 25-minute drive times; notable residential clusters in areas to the west of the Hamlet were taken into the PTA.

Figure 1: Bragg Creek Primary Trade Area

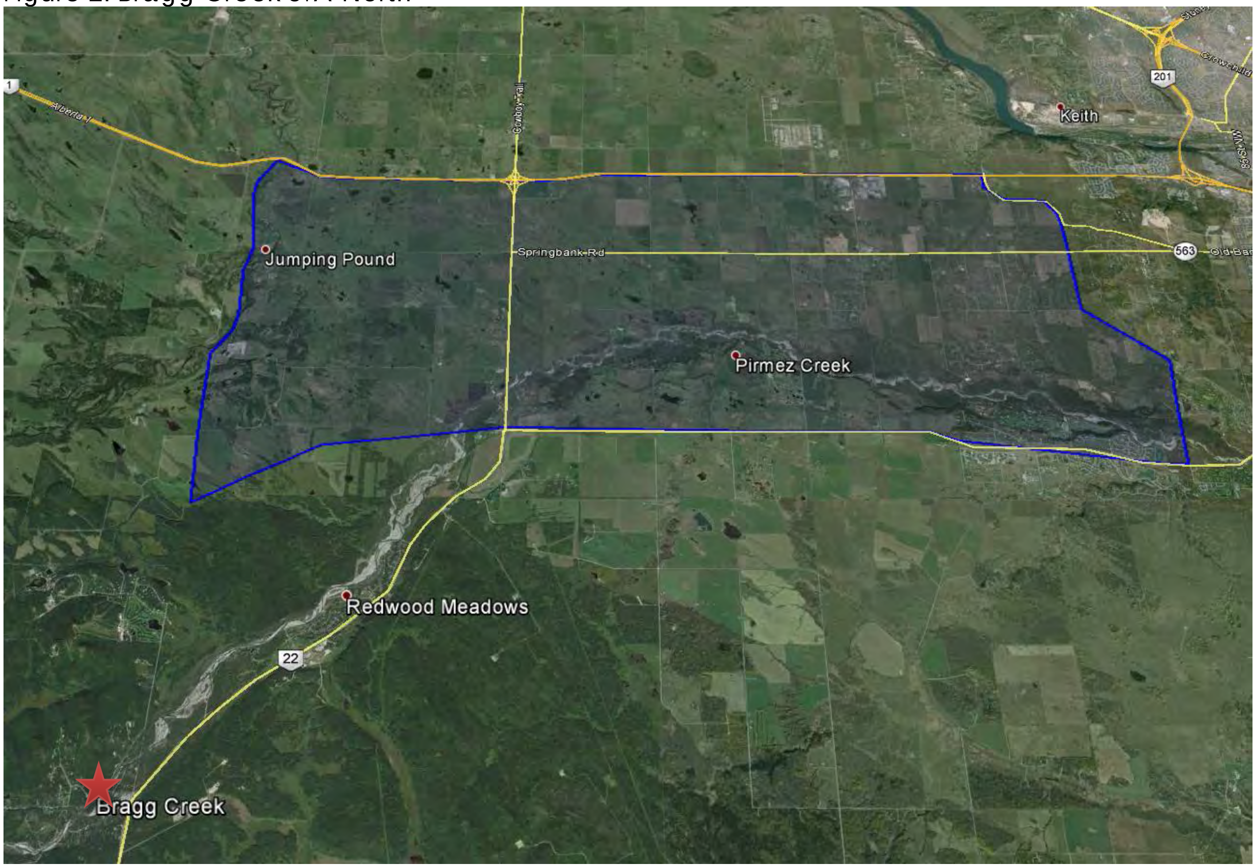



## Secondary Trade Areas

The STAs were delineated partly on the basis of the 20- and 25-minute drive time zones, with significant extensions beyond those areas for the southern boundaries.

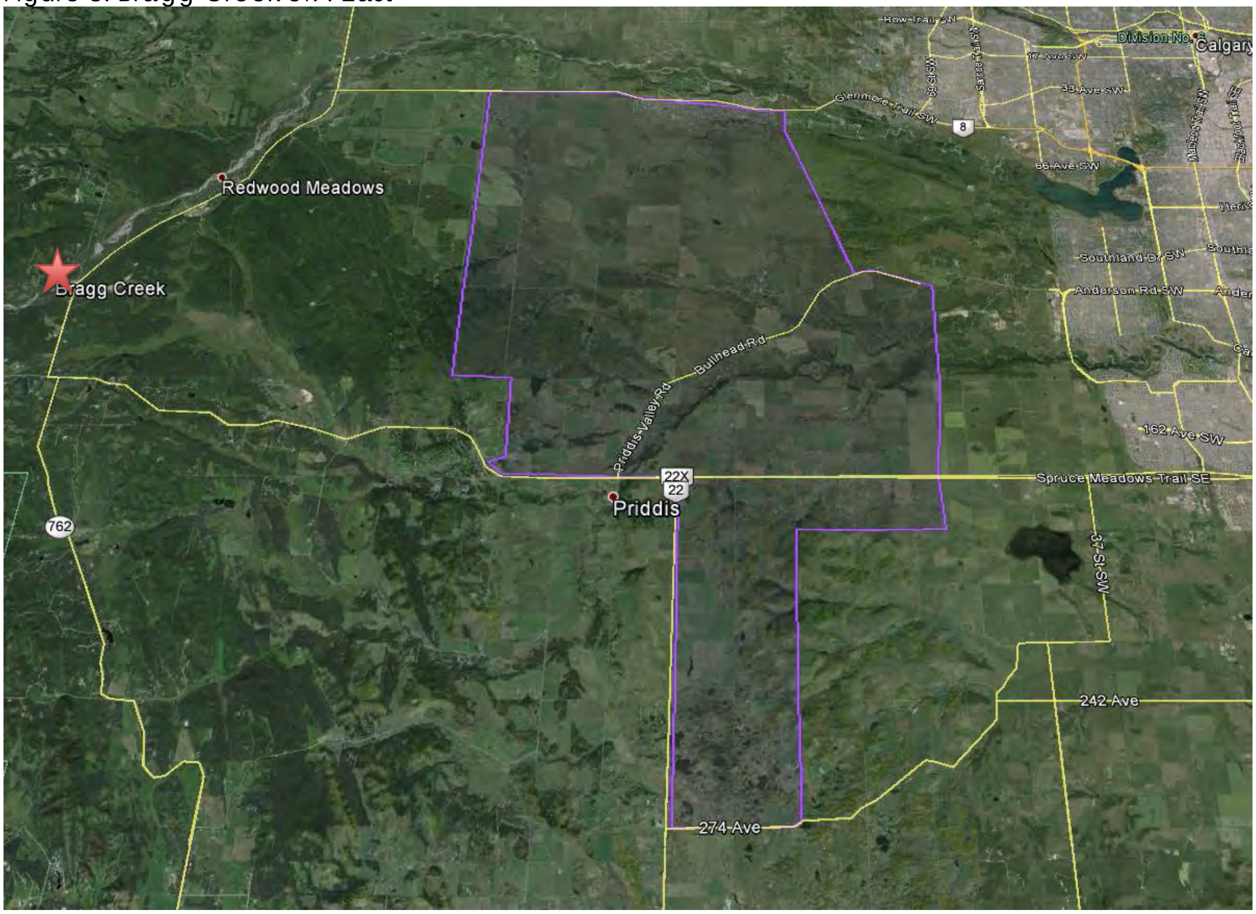
The north STA (STA-N) has been delineated using Highway 8 as a southern boundary, Highway 1 as a northern boundary, the approximate course of the Elbow River west of Jumping Pound as the western boundary, and the Clearwater Drive alignment / Highway 25 / Horizon View Road as the eastern boundary. This area encompasses the Pirmez Creek area as well as residential subdivisions north of Highway 8 around the Glencoe Golf & Country Club.

Figure 2: Bragg Creek STA-North




The east STA (STA-E) has been delineated using Highway 8 as the northern boundary, the eastern extent of the PTA as the western boundary, 274 Avenue as the southern boundary, and an eastern boundary delineated on the basis of roadway presence/absence, extending as far east as Otter on Tsuu T'ina Indian Reserve 145.

Figure 3: Bragg Creek STA-East




Finally, the south STA (STA-S) uses highway 549 as an approximate southern boundary, the north-south roadway of Highways 50, 51, 52, 53, and 54 as the western boundary, Highway 22 as the eastern boundary, and the southern boundary of the PTA as the northern boundary.

Figure 4: Bragg Creek STA-South

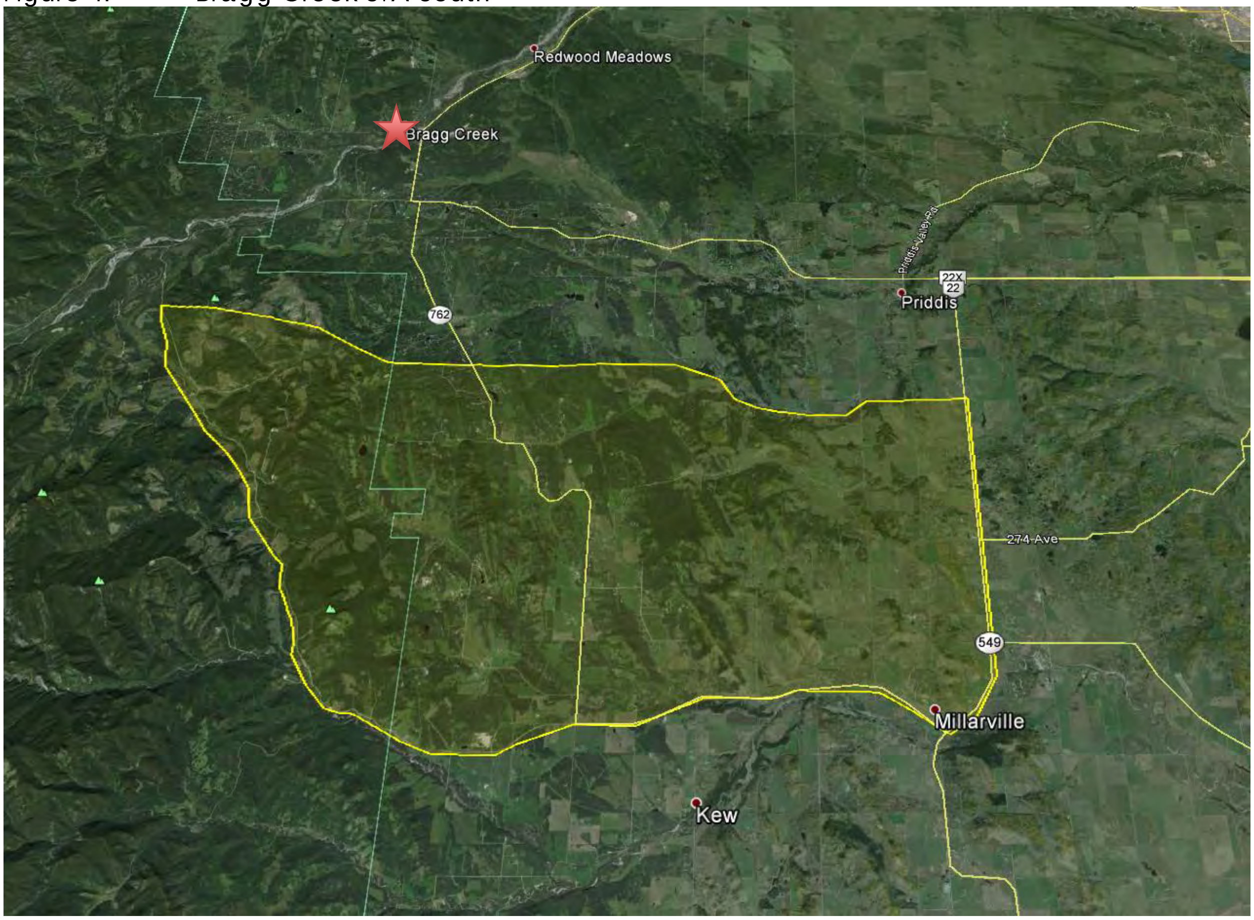
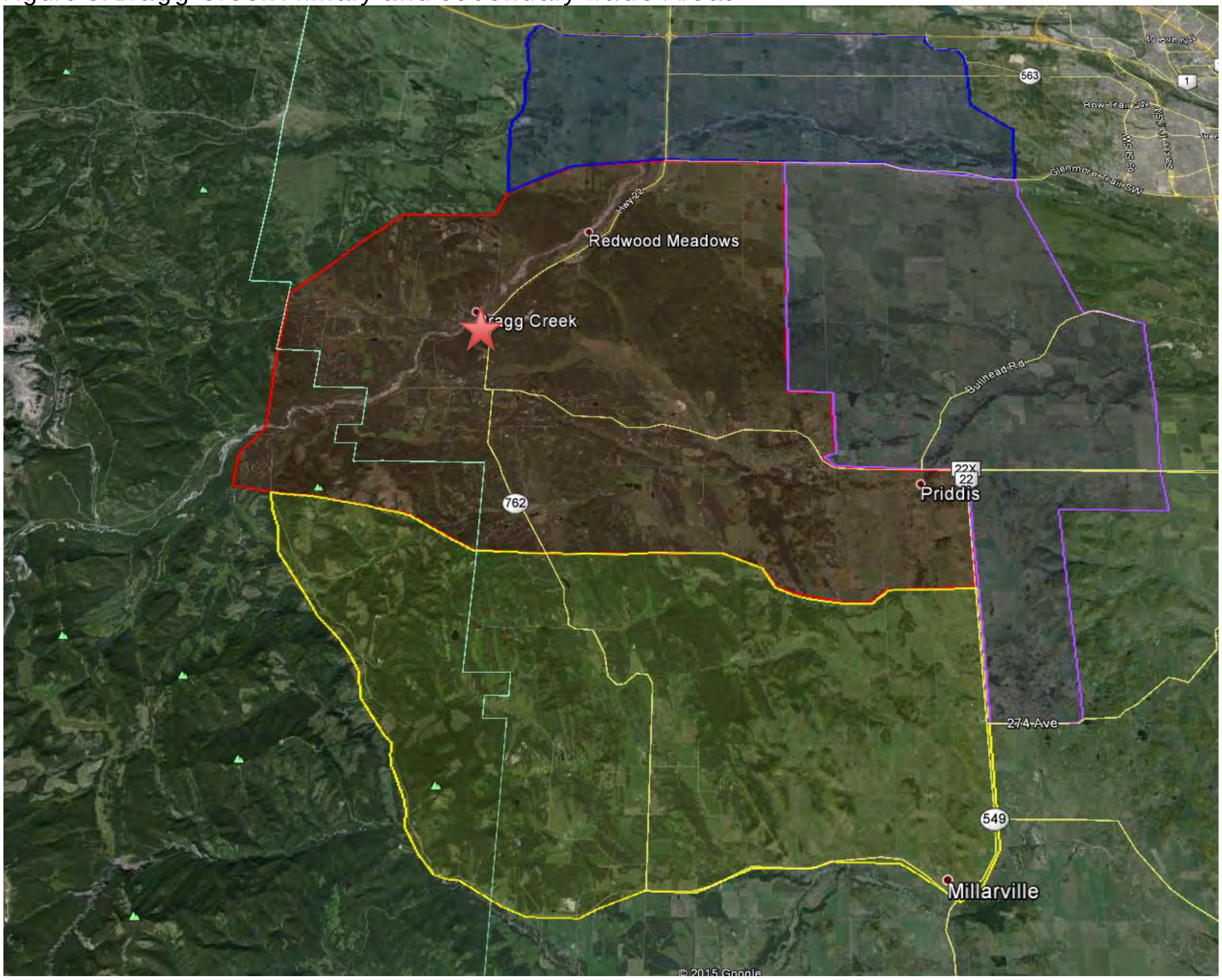



Figure 8 shows all delineated Bragg Creek trade areas.

Figure 5: Bragg Creek Primary and Secondary Trade Areas




## Trade Area Demographics

The demographic characters of the trade areas are examined in this section, using the 2013 Environics Analytics Estimates & Projections database. Each trade area is also compared with the City of Calgary.

### Primary Trade Area (PTA)

- Population: 5,091
- The PTA has a much older demographic than the City of Calgary, with a median age of 45 compared to Calgary at 36.2. However, at the same time the PTA has a higher proportion of residents age 5 to 19 (20.5%) than the City of Calgary (16.8%)
- It is in the prime household formation and child rearing age cohorts where the PTA shows a significant dearth compared to Calgary:
    - 20-24: 5.4% vs. 7.2%
    - 25-34: 6.5% vs. 17.6%
    - 35-44: 12.8% vs. 15.9%

- The PTA also shows a greater overall proportion of older age cohorts than the City of Calgary:
  - 45-54: 19.8% vs. 14.7%
  - 55-64: 18.5% vs. 11.1%
  - 65-74: 8.5% vs. 5.7%
- The estimated average household income in 2013 in the PTA was 82% higher than the City of Calgary ($215,000 vs. $121,000)
- 76% of occupied dwellings were owned in the PTA, vs. 71% in the City of Calgary
- 36% of the PTA's population has a university certificate or diploma, vs. 29.3% in the City of Calgary

**Secondary Trade Area North (STA-N)**

- Population: 3,941
- Like the PTA, the STA-N has an older demographic than the City of Calgary with a median age of 43.3 (vs. 36.2). At the same time, nearly 29% of the population is under the age of 19 and 35% of the population is under the age of 24 (vs. 22% and 27% for the City of Calgary respectively)
- The estimated average household income in 2013 in the STA-N was nearly 2.7 times that of Calgary at $442,000
- Nearly 50% of the population has a bachelor degree or higher

Secondary Trade Area East (STA-E)

- Population: 2,455
- The STA-E is much like the STA-N in terms of demographic profile and income. The median age is 45.4, with over 26% of the population under the age of 19
- The estimated average household incomes in 2013 in the STA-E were 2.4x that of Calgary at $411,000
- 47% of the population has a bachelor degree or higher

**Secondary Trade Area South (STA-S)**

- Population: 1,181
- The population of the STA-S is older than the other STAs, with a median age of 48.2. There are fewer young people (20% under 19, which is lower than Calgary), and nearly 34% of the population is over 55
- The estimated average household income in 2013 in the STA-S was $199,400, which is 64% above that of the City of Calgary
- 36% of the population has a bachelor degree or higher

Table 12: Bragg Creek Trade Area + City of Calgary Demographic Snapshot, 2013

| 2013 Demographic Snapshot | PTA | | STA N | | STA E | | STA S | | Calgary (CY), AB | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | % | | % | | % | | % | | % |
| **Total Population** | | | | | | | | | | |
| 2013 estimated | 5,091 | | 3,941 | | 2,455 | | 1,181 | | 1,175,230 | |
| % Pop. Change (2008-2013) | 5.00% | | 13.20% | | 0.80% | | 3.40% | | 8.70% | |
| **2013 Total Population by Age** | **5,091** | | **3,941** | | **2,455** | | **1,181** | | **1,175,230** | |
| 0 to 4 years | 235 | 5% | 144 | 4% | 96 | 4% | 48 | 4% | 75,623 | 6% |
| 5 to 19 years | 1,045 | 21% | 967 | 25% | 550 | 22% | 191 | 16% | 197,052 | 17% |
| 20 to 24 years | 275 | 5% | 285 | 7% | 152 | 6% | 55 | 5% | 84,792 | 7% |
| 25 to 34 years | 333 | 7% | 217 | 6% | 128 | 5% | 73 | 6% | 206,820 | 18% |
| 35 to 44 years | 654 | 13% | 455 | 12% | 282 | 12% | 150 | 13% | 186,925 | 16% |
| 45 to 54 years | 1,008 | 20% | 801 | 20% | 513 | 21% | 257 | 22% | 172,929 | 15% |
| 55 to 64 years | 942 | 19% | 675 | 17% | 453 | 19% | 250 | 21% | 130,248 | 11% |
| 65 to 74 years | 433 | 9% | 286 | 7% | 202 | 8% | 125 | 11% | 67,205 | 6% |
| 75 years & over | 166 | 3% | 112 | 3% | 78 | 3% | 32 | 3% | 53,636 | 5% |
| **Median Age** | 45 | | 43.3 | | 45.4 | | 48.2 | | 36.2 | |
| **2013 Total Census Families** | **1,538** | | **1,126** | | **729** | | **382** | | **300,177** | |
| Average Persons Per Family | 3 | | 3.2 | | 3.1 | | 2.8 | | 3.1 | |
| Total Couples | 1,413 | 92% | 1,059 | 94% | 695 | 95% | 355 | 93% | 256,665 | 86% |
| Without children at home | 695 | 45% | 419 | 37% | 312 | 43% | 203 | 53% | 98,602 | 33% |
| With children at home | 718 | 47% | 639 | 57% | 383 | 53% | 152 | 40% | 158,063 | 53% |
| Lone-parent families | 124 | 8% | 67 | 6% | 34 | 5% | 27 | 7% | 43,512 | 15% |
| Children Per Census Family | 1 | | 1.2 | | 1.1 | | 0.8 | | 1.2 | |
| **2013 Educational Attainment (15 years+)** | **4,149** | | **3,162** | | **2,027** | | **1,020** | | **955,314** | |
| Less than a bachelor degree | 2,639 | 64% | 1,598 | 51% | 1,069 | 53% | 657 | 64% | 675,477 | 71% |
| Bachelor degree & higher | 1,510 | 36% | 1,564 | 50% | 958 | 47% | 363 | 36% | 279,837 | 29% |
| **2013 Households** | **1,817** | | **1,237** | | **838** | | **467** | | **452,951** | |
| Persons per household | 2.78 | | 3.16 | | 2.94 | | 2.55 | | 2.56 | |
| Average household income | $214,995 | | $442,168 | | $410,841 | | $199,415 | | $121,238 | |
| **2013 Occupied Dwellings** | **1,817** | | **1,237** | | **838** | | **467** | | **452,951** | |
| Owned dwellings | 1,379 | 76% | 1,158 | 94% | 789 | 94% | 425 | 91% | 339,165 | 75% |
| Rented dwellings | 125 | 7% | 79 | 6% | 46 | 6% | 42 | 9% | 113,786 | 25% |
| Dominant building type | Houses | | Houses | | Houses | | Houses | | Houses | |
| Dominant period of construction | 1991-1995 | | 2001-2006 | | 2001-2006 | | 1991-1995 | | 1971-1980 | |
| **Dominant Demographics** | | | | | | | | | | |
| Official Home Language | English | | English | | English | | English | | English | |
| Non-official Home Language | German | | German | | German | | German | | Other Languages | |
| Top 3 visible minorities | Chinese<br>Japanese<br>Filipino | | Chinese<br>South Asian<br>Latin American | | Chinese<br>South Asian<br>Southeast Asian | | Japanese<br>Filipino<br>Visible minority, n.i.e. | | Chinese<br>South Asian<br>Filipino | |

# Retail Demand Analysis

## Introduction

This section examines retail market demand, including retail expenditure potential, warranted floor area, and its distribution among commercial category. This analysis is conducted in order to assess what the market in the Hamlet may be able to support in terms of net additional space in the coming 15 years. This section proceeds according to the following steps:

- Population profiles and projections for each trade area
- Analysis of retail expenditure potential of each trade area, projected to 2030
- Estimated market capture and inflow expenditures
- Commercial floor area warranted by the amount of expenditure within the trade areas, plus inflow expenditures.

## Trade Area Population Growth

Population growth projections have been made for the trade areas using Environics Analytics estimates and projections to 2023, with linear extrapolation for growth from 2023 to 2030.[6]

For areas of the PTA outside of the Hamlet, population growth is projected at an average annual rate of 0.8%. Amongst the STAs, the north is projected to see the fastest growth at an average annual rate of nearly 3%. STA-E is projected to grow at an average annual rate of 1.1%, and STA-S is projected to grow at an average annual rate of 1%.

Table 13: Hamlet and Trade Area Population Forecasts

| | 2013 | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|---|
| **Hamlet Population** | 454 | 484 | 640 | 790 | 908 |
| **PTA, excluding Hamlet** | 4,637 | 4,709 | 4,873 | 5,068 | 5,273 |
| **STA-N** | 3,483 | 3,920 | 4,515 | 5,130 | 5,697 |
| **STA-E** | 2,434 | 2,467 | 2,594 | 2,752 | 2,924 |
| **STA-S** | 1,143 | 1,180 | 1,234 | 1,292 | 1,348 |
| **TOTAL** | 12,151 | 12,760 | 13,856 | 15,032 | 16,149 |

## Trade Areas' Retail Expenditure Potential

The retail expenditure potential has been calculated for each trade area using the Canada Expenditure Potential database, which is a tool developed using Statistics Canada's Survey of Household Spending and proprietary data collected by Pitney Bowes. This database allows for spending estimates at the DA level of residence. We assume an escalation of the average annual real expenditure growth of 1% per year.

Tables 14 and 15 show the estimated gross expenditure potential of the residents of each trade area in 2015 and 2030. Today, the combined pool of retail spending for the PTA and STAs is estimated at $336 million.

[6] This excludes the growth rate for the Hamlet itself, for which population is projected to grow at the rates detailed in the above residential section of this report.

Table 14: Combined Retail & Service Commercial Spending Potential Estimate, 2015

| | PTA | STA N | STA E | STA S | Total |
|---|---|---|---|---|---|
| Population | 5,204 | 4,709 | 3,920 | 2,467 | 16,300 |
| **Retail Categories** | | | | | |
| **Convenience Goods & Services** | **$34,050,473** | **$37,469,119** | **$32,512,061** | **$19,629,861** | **$123,661,514** |
| Grocery & Specialty Food | $18,699,549 | $19,415,110 | $16,853,334 | $10,171,467 | $65,139,460 |
| Pharmacy | $1,292,882 | $1,592,920 | $1,391,925 | $834,522 | $5,112,249 |
| Alcohol & Tobacco | $3,543,505 | $2,663,650 | $2,311,497 | $1,395,471 | $9,914,124 |
| Services | $10,514,537 | $13,797,439 | $11,955,305 | $7,228,401 | $43,495,681 |
| **Comparison Goods** | **$34,992,981** | **$40,825,797** | **$35,389,826** | **$21,388,405** | **$132,597,008** |
| Apparel | $7,460,014 | $8,353,551 | $7,236,394 | $4,376,379 | $27,426,338 |
| Footwear & Fashion Accessories | $2,293,191 | $2,479,074 | $2,147,747 | $1,298,773 | $8,218,784 |
| Cosmetics, Health, Bath & Beauty | $2,132,633 | $2,309,830 | $2,003,489 | $1,210,107 | $7,656,059 |
| jewelry & Accessories | $972,800 | $2,474,238 | $2,152,468 | $1,296,239 | $6,895,745 |
| Home/Portable Electronics & Appliances | $7,398,264 | $8,355,140 | $7,251,247 | $4,377,211 | $27,381,860 |
| Multimedia, Books & Music | $2,072,026 | $1,754,100 | $1,520,583 | $918,963 | $6,265,673 |
| Home Furnishings & Accessories | $3,878,776 | $6,026,624 | $5,223,856 | $3,157,315 | $18,286,571 |
| Home Improvement | $5,457,179 | $6,403,864 | $5,547,228 | $3,354,948 | $20,763,220 |
| Toys / Hobbies / Pets | $2,308,218 | $1,622,439 | $1,399,060 | $849,987 | $6,179,704 |
| Sporting & Recreational Goods | $1,019,880 | $1,046,936 | $907,752 | $548,484 | $3,523,053 |
| **Food & Beverage** | **$6,877,370** | **$7,718,208** | **$6,680,689** | **$4,043,526** | **$25,319,792** |
| Restaurants | $5,989,178 | $6,946,035 | $6,012,522 | $3,638,989 | $22,586,723 |
| Alcohol Sales - Pubs / Lounges / Restaurants | $888,192 | $772,173 | $668,167 | $404,537 | $2,733,069 |
| **Automotive Goods & Services** | **$3,823,170** | **$27,709,754** | **$8,410,003** | **$14,516,984** | **$54,459,911** |
| **Total Retail Spending** | **$79,743,994** | **$113,722,878** | **$82,992,577** | **$59,578,776** | **$336,038,225** |

By 2030, the pool of spending for the trade areas is estimated to $433 million.

Table 15: Combined Retail & Service Commercial Spending Potential Estimate, 2030

| | PTA | STA N | STA E | STA S | Total |
|---|---|---|---|---|---|
| Population | 6,208 | 5,273 | 5,697 | 2,924 | 20,102 |
| **Retail Categories** | | | | | |
| **Convenience Goods & Services** | **$42,570,993** | **$46,845,095** | **$40,647,621** | **$24,541,881** | **$154,605,590** |
| Grocery & Specialty Food | $23,378,776 | $24,273,393 | $21,070,579 | $12,716,694 | $81,439,442 |
| Pharmacy | $1,616,403 | $1,991,520 | $1,740,229 | $1,043,346 | $6,391,498 |
| Alcohol & Tobacco | $4,430,204 | $3,330,181 | $2,889,908 | $1,744,663 | $12,394,955 |
| Services | $13,145,611 | $17,250,000 | $14,946,905 | $9,037,178 | $54,379,695 |
| **Comparison Goods** | **$43,749,346** | **$51,041,720** | **$44,245,495** | **$26,740,470** | **$165,777,031** |
| Apparel | $9,326,749 | $10,443,878 | $9,047,172 | $5,471,489 | $34,289,288 |
| Footwear & Fashion Accessories | $2,867,021 | $3,099,417 | $2,685,182 | $1,623,767 | $10,275,387 |
| Cosmetics, Health, Bath & Beauty | $2,666,286 | $2,887,824 | $2,504,826 | $1,512,915 | $9,571,851 |
| jewelry & Accessories | $1,216,226 | $3,093,371 | $2,691,085 | $1,620,600 | $8,621,281 |
| Home/Portable Electronics & Appliances | $9,249,546 | $10,445,863 | $9,065,741 | $5,472,529 | $34,233,680 |
| Multimedia, Books & Music | $2,590,514 | $2,193,032 | $1,901,082 | $1,148,917 | $7,833,546 |
| Home Furnishings & Accessories | $4,849,370 | $7,534,679 | $6,531,033 | $3,947,376 | $22,862,458 |
| Home Improvement | $6,822,740 | $8,006,316 | $6,935,323 | $4,194,464 | $25,958,843 |
| Toys / Hobbies / Pets | $2,885,809 | $2,028,425 | $1,749,150 | $1,062,680 | $7,726,064 |
| Sporting & Recreational Goods | $1,275,086 | $1,308,913 | $1,134,901 | $685,732 | $4,404,633 |
| **Food & Beverage** | **$8,598,308** | **$9,649,551** | **$8,352,411** | **$5,055,346** | **$31,655,616** |
| Restaurants | $7,487,862 | $8,684,156 | $7,517,048 | $4,549,580 | $28,238,646 |
| Alcohol Sales - Pubs / Lounges / Restaurants | $1,110,446 | $965,395 | $835,363 | $505,765 | $3,416,970 |
| **Automotive Goods & Services** | **$5,702,166** | **$38,787,154** | **$15,281,795** | **$21,513,302** | **$81,284,416** |
| **Total Retail Spending** | **$100,620,814** | **$146,323,520** | **$108,527,321** | **$77,850,998** | **$433,322,653** |

## Estimated Market Capture

Market capture rates estimate the percentage of overall retail spending within the designated trade areas that is likely to flow to retailers within the Hamlet. Population segments that live in relatively close proximity to, or within, the Hamlet will have a higher market capture rate than those groups further afield. Other factors that impact capture rates are market positioning of retailers (i.e. stores that target certain ethnic groups or buyer segments), retail competition, and physical barriers.

In setting reasonable market capture rates for the Hamlet, the following factors were taken into account:

- The majority of area residents commute out of the Hamlet to work, mostly to Calgary. Given the variety of shops and services available in Calgary (17+ million square feet of retail, with another 9.5 million square feet proposed), we would expect that this is where the majority of household purchases will be made.
- Cochrane is located 32 driving kilometres due north of Bragg Creek and 15km north of the Highway 1 & Highway 8 interchange. Many families in the greater Bragg Creek area make regular trips to Cochrane for non-shopping reasons such as taking their children to the Big Hill Leisure Pool or other indoor recreational and cultural activities. These trips are often paired with shopping, given the presence of large grocery-anchored shopping centres along Fifth Avenue.
- The current mix of goods and services in Bragg Creek is not conducive to attracting residents to do more than basic convenience or targeted niche destination shopping. This, in combination with the unpredictable and uncoordinated operating hours of the major mall and the lack of shops/services open into the evening hours, acts as a deterrent to local shopping. With that said, the capture rates attempt to provide a blend of what is likely happening today and what could be possible in the future.

Table 16: Bragg Creek Trade Areas Estimated Market Capture Rates

| Retail Categories | PTA | STA-N | STA-E | STA-S |
|---|---|---|---|---|
| **Convenience Goods & Services** | | | | |
| Grocery & Specialty Food | 20% | 5% | 5% | 10% |
| Pharmacy | 20% | 5% | 5% | 10% |
| Alcohol & Tobacco | 30% | 15% | 15% | 15% |
| Services | 25% | 15% | 15% | 10% |
| **Comparison Goods** | | | | |
| Apparel | 8% | 3% | 3% | 3% |
| Footwear & Fashion Accessories | 8% | 3% | 3% | 3% |
| Cosmetics, Health, Bath & Beauty | 20% | 5% | 5% | 5% |
| Jewelry & Accessories | 10% | 5% | 5% | 5% |
| Home/Portable Electronics & Appliances | 5% | 2% | 2% | 2% |
| Multimedia, Books & Music | 10% | 5% | 5% | 5% |
| Home Furnishings & Accessories | 25% | 8% | 8% | 10% |
| Home Improvement | 15% | 2% | 2% | 5% |
| Toys / Hobbies / Pets | 25% | 5% | 5% | 10% |
| Sporting & Recreational Goods | 25% | 10% | 10% | 10% |
| **Food & Beverage** | | | | |
| Restaurants | 35% | 15% | 15% | 15% |
| Alcohol Sales - Pubs / Lounges / Restaurants | 35% | 15% | 15% | 15% |
| **Automotive Goods & Services** | 5% | 2% | 2% | 2% |

## Net Local Expenditure Estimate

By applying the capture rates presented in Table 16 to the gross expenditure potential by trade area (Tables 14 and 15), an estimate of net expenditures in the Hamlet is created. In 2015, total retail and service commercial sales are estimated at $40 million.

Table 17: Combined Retail and Service Commercial Spending Potential Estimate, 2015

| | Inflow | PTA | STA N | STA E | STA S | Total |
|---|---|---|---|---|---|---|
| Population | | 5,204 | 4,709 | 3,920 | 2,467 | 16,300 |
| **Retail Categories** | | | | | | |
| **Convenience Goods & Services** | **$814,739** | **$7,690,172** | **$3,519,565** | **$3,052,283** | **$2,032,760** | **$16,294,780** |
| Grocery & Specialty Food | $328,524 | $3,739,910 | $970,756 | $842,667 | $1,017,147 | $6,899,003 |
| Pharmacy | $24,564 | $258,576 | $79,646 | $69,596 | $83,452 | $515,834 |
| Alcohol & Tobacco | $100,932 | $1,063,052 | $399,548 | $346,725 | $209,321 | $2,119,577 |
| Services | $360,719 | $2,628,634 | $2,069,616 | $1,793,296 | $722,840 | $7,575,105 |
| **Comparison Goods** | **$2,848,891** | **$4,501,474** | **$1,615,013** | **$1,399,958** | **$1,052,390** | **$11,417,726** |
| Apparel | $179,369 | $596,801 | $250,607 | $217,092 | $131,291 | $1,375,159 |
| Footwear & Fashion Accessories | $36,122 | $183,455 | $74,372 | $64,432 | $38,963 | $397,345 |
| Cosmetics, Health, Bath & Beauty | $70,270 | $426,527 | $115,492 | $100,174 | $60,505 | $772,968 |
| jewelry & Accessories | $39,343 | $97,280 | $123,712 | $107,623 | $64,812 | $432,770 |
| Home/Portable Electronics & Appliances | $0 | $369,913 | $167,103 | $145,025 | $87,544 | $769,585 |
| Multimedia, Books & Music | $20,844 | $207,203 | $87,705 | $76,029 | $45,948 | $437,729 |
| Home Furnishings & Accessories | $1,529,825 | $969,694 | $482,130 | $417,909 | $315,731 | $3,715,289 |
| Home Improvement | $61,267 | $818,577 | $128,077 | $110,945 | $167,747 | $1,286,613 |
| Toys / Hobbies / Pets | $406,564 | $577,055 | $81,122 | $69,953 | $84,999 | $1,219,692 |
| Sporting & Recreational Goods | $505,287 | $254,970 | $104,694 | $90,775 | $54,848 | $1,010,574 |
| **Food & Beverage** | **$5,173,443** | **$2,407,079** | **$1,157,731** | **$1,002,103** | **$606,529** | **$10,346,886** |
| Restaurants | $4,585,844 | $2,096,212 | $1,041,905 | $901,878 | $545,848 | $9,171,688 |
| Alcohol Sales - Pubs / Lounges / Restaurants | $587,599 | $310,867 | $115,826 | $100,225 | $60,681 | $1,175,197 |
| **Automotive Goods & Services** | **$60,195** | **$191,159** | **$554,195** | **$168,200** | **$290,340** | **$1,264,088** |
| **Total Retail Spending** | **$8,897,267** | **$14,789,884** | **$6,846,504** | **$5,622,544** | **$3,982,018** | **$40,138,218** |

The inflow factor is added to the expenditures from the delineated trade areas to account for expenditure that is likely to flow in from beyond those areas as a result of tourism. We have deliberately set the inflow rates at conservative levels. Business owners have indicated that tourism-related spending has fallen in recent years, partially attributable to the closure in 03/04 of the Wintergreen ski hill, and compounded by the drying up of many international travel groups in the years following the 2008 financial crisis.

However, tourism-related spending – and particularly day-trip local tourism – is likely to increase in the coming years, particularly if the Hamlet core can offer a more enticing and inviting location for shopping and leisure. The variety and associated popularity of Bragg Creek mountain bike trails are increasing rapidly, with West Bragg Creek and Moose Mountain quickly becoming one of the top mountain biking destination for greater Calgary residents and others beyond. Combined with other expanding recreational opportunities in and around the Hamlet such as hiking, cross-country skiing and horseback riding, it should be possible to draw an increasing number of day-trippers from Calgary over the coming years. If higher quality overnight accommodations can be provided in the future, there is also potential in Bragg Creek to attract more overnight tourists.

## Floor Area Demand Projection

The combined forecast retail sales are divided by the estimated annual sales performance by retail category ($/sf/year) to calculate supportable floor space.

### Floor Area Demand, 2015

In 2015, it is estimated that just less than 132,000 square feet of total retail and service commercial space (including automotive) is supportable within Bragg Creek. This compares to an estimated 139,000 square feet of occupied floor area and 153,000 square feet of total supply. On the whole, this could be classified as a fairly balanced market with an indication of oversupply.

Table 18 breaks down estimated floor area demand by source and by category, and compares it to existing floor area supply.

Table 18: Net Supportable Floor Area, 2015

| | Sales Performance | Inflow | PTA | STA N | STA E | STA S | Total | Total Est. Floor Space | Net Additional? |
|---|---|---|---|---|---|---|---|---|---|
| Population | $/sf/yr | | 5,204 | 4,709 | 3,920 | 2,467 | **16,300** | | |
| **Retail Categories** | | | | | | | | | |
| **Convenience Goods & Services** | | **2,356** | **20,081** | **11,586** | **10,044** | **5,416** | **49,483** | **50,400** | |
| Grocery & Specialty Food | $600 | 548 | 6,233 | 1,618 | 1,404 | 1,695 | **11,498** | 10,200 | 1,000 |
| Pharmacy | $400 | 61 | 646 | 199 | 174 | 209 | **1,290** | 1,200 | - |
| Alcohol & Tobacco | $700 | 144 | 1,519 | 571 | 495 | 299 | **3,028** | 4,300 | - |
| Services | $225 | 1,603 | 11,683 | 9,198 | 7,970 | 3,213 | **33,667** | 34,700 | - |
| **Comparison Goods** | | **11,519** | **14,128** | **4,873** | **5,004** | **3,415** | **38,938** | **43,700** | |
| Apparel, Footwear & Fashion Accessories | $325 | 663 | 1,177 | 276 | 1,019 | 167 | **3,302** | 4,900 | - |
| Cosmetics, Health, Bath & Beauty | $400 | 176 | 1,066 | 289 | 250 | 151 | **1,932** | 2,200 | - |
| jewelry & Accessories | $325 | 121 | 299 | 381 | 331 | 199 | **1,332** | 1,100 | - |
| Home/Portable Electronics & Appliances | $750 | - | 493 | 223 | 193 | 117 | **1,026** | 500 | 500 |
| Multimedia, Books & Music | $350 | 60 | 592 | 251 | 217 | 131 | **1,251** | 500 | 1,000 |
| Home Furnishings & Accessories | $200 | 7,649 | 4,848 | 2,411 | 2,090 | 1,579 | **18,576** | 19,000 | - |
| Home Improvement | $250 | 245 | 3,274 | 512 | 444 | 671 | **5,146** | 5,500 | - |
| Toys / Hobbies / Pets / Gifts | $350 | 1,162 | 1,649 | 232 | 200 | 243 | **3,485** | 4,500 | - |
| Sporting & Recreational Goods | $350 | 1,444 | 728 | 299 | 259 | 157 | **2,887** | 5,500 | - |
| **Food & Beverage** | | **20,694** | **9,628** | **4,631** | **4,008** | **2,426** | **41,388** | **43,000** | |
| Restaurants | $250 | 18,343 | 8,385 | 4,168 | 3,608 | 2,183 | **36,687** | 38,000 | - |
| Alcohol Sales - Pubs / Lounges / Restaurants | $250 | 2,350 | 1,243 | 463 | 401 | 243 | **4,701** | 5,000 | - |
| **Automotive Goods & Services** | **$600** | **100** | **319** | **924** | **280** | **484** | **2,107** | **2,000** | - |
| **Vacant** | | | | | | | | **14,000** | |
| **Total Floor Area Supportable** | | **34,669** | **44,156** | **22,013** | **19,337** | **11,740** | **131,916** | | |
| **Total Occupied Floor Area** | | | | | | | | **139,100** | |

Looking at the demand vs. supply on a category-by-category basis, we find that in most of the convenience-type goods and services categories, Bragg Creek is relatively balanced. Within the Grocery & Specialty Food category, there is an indication that some additional space could be warranted.

Within the Comparison Goods category there are indicators of existing latent demand in the categories of Home/Portable Electronics & Appliances and Multimedia, Books & Music. Within the Food & Beverage category, the figures show relative balance however this is premised on the assumption that nearly 50% of the floor area in this category is supported by 'inflow' dollars beyond the trade areas.

## Floor Area Demand, 2020

Looking forward five years, we find that by 2020 the net floor area demand increases by over 15,000 square feet, to 147,000 square feet. This would be a net increase of 8,000 square feet over the amount of occupied floor area in 2015.

On a category-by-category basis, we find net additional demand for **11,000 square feet** in 8 commercial categories while conditions of balance or slight oversupply persist in the others.

If 11,000 square feet of new commercial business were to enter the market by way of existing vacant space (i.e. no new space were constructed), this would leave the Hamlet with a vacancy rate of 2%. To maintain a healthy frictional market vacancy rate of 5-7%, there would need to be an **additional 7,000 to 10,000 square feet** of commercial space added to the market.[7]

[7] Frictional Vacancy is the excess supply that allows the market to work efficiently. It allows for easy movement of space users from one place or space to another.

Table 19: Net Supportable Floor Area, 2020

| | Sales Performance | Inflow | PTA | STA N | STA E | STA S | Total | Total Est. Floor Space | Net Additional? |
|---|---|---|---|---|---|---|---|---|---|
| Population | $/sf/yr | | 5,510 | 4,873 | 4,515 | 2,594 | **17,492** | | |
| **Retail Categories** | | | | | | | | | |
| **Convenience Goods & Services** | | **2,589** | **21,795** | **12,288** | **11,859** | **5,836** | **54,367** | **50,400** | |
| Grocery & Specialty Food | $631 | 598 | 6,765 | 1,716 | 1,658 | 1,827 | **12,565** | 10,200 | 2,000 |
| Pharmacy | $420 | 67 | 702 | 211 | 205 | 225 | **1,410** | 1,200 | - |
| Alcohol & Tobacco | $736 | 158 | 1,648 | 605 | 585 | 322 | **3,319** | 4,300 | - |
| Services | $236 | 1,765 | 12,680 | 9,755 | 9,410 | 3,462 | **37,073** | 34,700 | 2,000 |
| **Comparison Goods** | | **12,626** | **16,662** | **5,935** | **5,727** | **4,065** | **45,016** | **43,700** | |
| Apparel, Footwear & Fashion Accessories | $342 | 727 | 2,606 | 1,060 | 1,023 | 565 | **5,981** | 4,900 | 1,000 |
| Cosmetics, Health, Bath & Beauty | $420 | 192 | 1,157 | 306 | 296 | 163 | **2,114** | 2,200 | - |
| jewelry & Accessories | $342 | 133 | 325 | 404 | 391 | 215 | **1,468** | 1,100 | - |
| Home/Portable Electronics & Appliances | $788 | - | 535 | 236 | 228 | 126 | **1,126** | 500 | 1,000 |
| Multimedia, Books & Music | $368 | 65 | 643 | 266 | 256 | 141 | **1,372** | 500 | 1,000 |
| Home Furnishings & Accessories | $210 | 8,391 | 5,262 | 2,557 | 2,467 | 1,701 | **20,378** | 19,000 | 1,000 |
| Home Improvement | $263 | 267 | 3,554 | 543 | 524 | 723 | **5,611** | 5,500 | - |
| Toys / Hobbies / Pets / Gifts | $368 | 1,266 | 1,789 | 246 | 236 | 262 | **3,799** | 4,500 | - |
| Sporting & Recreational Goods | $368 | 1,583 | 791 | 317 | 306 | 169 | **3,166** | 5,500 | - |
| **Food & Beverage** | | **22,709** | **10,450** | **4,911** | **4,733** | **2,615** | **45,417** | **43,000** | |
| Restaurants | $263 | 20,133 | 9,100 | 4,420 | 4,259 | 2,353 | **40,266** | 38,000 | 2,000 |
| Alcohol Sales - Pubs / Lounges / Restaurants | $263 | 2,576 | 1,350 | 491 | 473 | 262 | **5,152** | 5,000 | - |
| **Automotive Goods & Services** | **$615** | **112** | **355** | **1,004** | **339** | **535** | **2,345** | **2,000** | **1,000** |
| **Vacant** | | | | | | | | **14,000** | |
| **Total Floor Area Supportable** | | **38,035** | **49,262** | **24,139** | **22,658** | **13,051** | **147,144** | | |

## Floor Area Demand, 2030

In the decade from 2020 to 2030 we can expect to see demand increase by an additional 25,000 square feet, to 171,500 square feet. This would be a net increase of 18,500 square feet over the amount of occupied floor area in 2015. In order to absorb 18,500 square feet of new commercial business into the market while maintaining a healthy frictional vacancy rate of 5-8%, Bragg Creek would require between 165,000 and 172,000 of total commercial floor area, which is a net increase of 13,000 to 19,000 square feet.

Looking at specific commercial categories we find net additional demand for **33,000 square feet,** most prominently in the Service, Grocery and Home Furnishings categories. If all of this demand were added to the market and a target vacancy rate of 5-7% were maintained, Bragg Creek would require a **net addition of 28,000 to 31,000 square feet** of new space.

Table 20: Net Supportable Floor Area, 2030

| | Sales Performance | Inflow | PTA | STA N | STA E | STA S | Total | Total Est. Floor Space | Net Additional? |
|---|---|---|---|---|---|---|---|---|---|
| Population | $/sf/yr | | 6,208 | 5,273 | 5,697 | 2,924 | **20,102** | | |
| **Retail Categories** | | | | | | | | | |
| **Convenience Goods & Services** | | **3,120** | **25,798** | **13,969** | **15,720** | **6,913** | **65,520** | **50,400** | |
| Grocery & Specialty Food | $697 | 716 | 8,008 | 1,951 | 2,198 | 2,164 | **15,036** | 10,200 | 5,000 |
| Pharmacy | $464 | 80 | 830 | 240 | 272 | 266 | **1,690** | 1,200 | - |
| Alcohol & Tobacco | $813 | 190 | 1,951 | 688 | 775 | 382 | **3,986** | 4,300 | - |
| Services | $261 | 2,134 | 15,009 | 11,090 | 12,475 | 4,101 | **44,808** | 34,700 | 10,000 |
| **Comparison Goods** | | **15,170** | **19,722** | **6,748** | **7,592** | **4,815** | **54,047** | **43,700** | |
| Apparel, Footwear & Fashion Accessories | $377 | 874 | 3,084 | 1,206 | 1,356 | 669 | **7,188** | 4,900 | 2,000 |
| Cosmetics, Health, Bath & Beauty | $464 | 230 | 1,370 | 348 | 392 | 193 | **2,533** | 2,200 | - |
| jewelry & Accessories | $377 | 162 | 385 | 459 | 518 | 255 | **1,778** | 1,100 | 1,000 |
| Home/Portable Electronics & Appliances | $871 | - | 634 | 269 | 303 | 149 | **1,354** | 500 | 1,000 |
| Multimedia, Books & Music | $406 | 79 | 761 | 302 | 340 | 168 | **1,649** | 500 | 1,000 |
| Home Furnishings & Accessories | $232 | 10,095 | 6,229 | 2,906 | 3,270 | 2,015 | **24,515** | 19,000 | 6,000 |
| Home Improvement | $290 | 319 | 4,206 | 618 | 695 | 856 | **6,694** | 5,500 | 1,000 |
| Toys / Hobbies / Pets / Gifts | $406 | 1,510 | 2,118 | 279 | 313 | 310 | **4,531** | 4,500 | - |
| Sporting & Recreational Goods | $406 | 1,902 | 936 | 361 | 406 | 200 | **3,805** | 5,500 | - |
| **Food & Beverage** | | **27,323** | **279** | **12,384** | **313** | **6,113** | **46,413** | **43,000** | |
| Restaurants | $290 | 24,230 | 129 | 11,303 | 145 | 5,579 | **41,386** | 38,000 | 3,000 |
| Alcohol Sales - Pubs / Lounges / Restaurants | $290 | 3,093 | 150 | 1,082 | 168 | 534 | **5,027** | 5,000 | - |
| **Automotive Goods & Services** | **$647** | **441** | **1,199** | **472** | **665** | **2,777** | **5,554** | **2,000** | **3,500** |
| **Vacant** | | | | | | | | **14,000** | |
| **Total Floor Area Supportable** | | **46,054** | **46,998** | **33,574** | **24,291** | **20,618** | **171,535** | **153,100** | |

## Demand Summary

- *Today:*
  - Overall this analysis indicates of oversupply of commercial floor space due to an imbalance between total demand, total occupied space, and high vacancy. However, latent demand for more space is apparent in a few categories.

- *By 2020:*
  - On a category-by-category basis, there is anticipated to be demand for 11,000 square feet of commercial floor space.
  - 7-10,000 square feet of net new space could be warranted.

- By 2030:
  - On a category-by-category basis, there is anticipated to be demand for 33,000 square feet of commercial floor space.
  - 28-31,000 square feet of net new space could be warranted.

## Implications of the Floor Area Demand Projection

One key question that needs to be considered as the planning process for the Hamlet moves forward is whether the existing vacant space in the marketplace is suitable for future space users; how one answers this question, and what alternate plans may be put in place for some of the existing older commercial properties, will affect the amount of assumed additional space that could be supported in the market in the coming years.

- If existing vacant space were ignored entirely and we were to assume that all new floor area demand for the next 15 years required newly constructed space, then +/-35,000 square feet of new retail space could be warranted.[8]
- If however we assume that existing vacant space will be filled in (up to a point) before new space construction is warranted, then net new space demand will be lower, but still 28-31,000 square feet.
- Further, if we believe that there is likely to be downsizing or outright closures in some of the commercial categories showing oversupply, or if some of the ground floor space currently taken up by non-service commercial offices (e.g. engineering and others) is freed up for use by future retailers and service providers (e.g. at the Old West Mall), then the amount of vacant space available for the retail market to grow into will increase, lessening still the demand for new space.
- *On the whole, it is reasonable to expect that the Bragg Creek Hamlet could see demand for the net addition of somewhere between 25,000 and 35,000 square feet of new space in the next 15 years.*

The question around vacant space and how the existing mall properties are treated ties back into the larger question of Bragg Creek's vision and future. What does Bragg Creek want to become? And is the existing commercial space (even fully leased) of the quality and design

[8] Assuming the new demand were treated as a market unto itself, with its own need for a healthy market vacancy level.

that is conducive to making Bragg Creek a vibrant, thriving Hamlet for locals and visitors alike? If the decision is made to reorient the Hamlet's epicentre to a new commercial Village core, then there needs to be a plan in place for how best to rehabilitate, re-use, or redevelop some of the existing commercial properties which are likely to face further vacancy and disinvestment. As a new Hamlet core becomes the epicentre of life in the community, the commercial space in this core will attract both new tenants and some of the stronger current tenants of the Hamlet who are able to pay higher rents and want to be where they will benefit from both local and visitor foot traffic. The loss of stronger tenants at existing properties will accelerate their decline.

# APPENDIX B

FIRST ROUND PUBLIC ENGAGEMENT:
WHAT WE HEARD REPORT

REVITALIZE
BRAGG CREEK

# WHAT WE'VE HEARD...

## FIRST ROUND PUBLIC ENGAGEMENT REPORT

APRIL 22, 2015

## PHYSICAL
### IMPROVEMENTS

Land Use Plan,Streetscape Improvements,
Infill Opportunities, Wayfinding, Trails,
Flood Mitigation

## ECONOMIC
### IMPROVEMENTS

Grant Funding, New Investment,
Tourism and Business

## COMMUNITY
### CULTURE

Community Spirit, Implementation,
Social Infrastructure

## POLICY
### AMENDMENTS

ASP Amendments, Land Use Bylaw Amendments,
Future Land Use Plan

# PROJECT TIMELINE

## JAN

**PHASE 1**
- Review of current policy
- Project Initiation Meeting
- Site Visits / Analysis
- Coffee meetings with stakeholder groups
- Public Engagement Plan

## FEB

**PHASE 1**
- Coffee meetings with stakeholder groups
- Project Website / Community Mail-out
- Project Background Report

## MAR

**PHASE 2**
- Online Interactive Map / Community Sounding Boards
- Public Meet & Greet
- Stakeholder Workshop

## APR

**PHASE 3**
- Summary / Analysis of feedback
- Interactive Community Design Workshop
- Economic / Housing Analysis

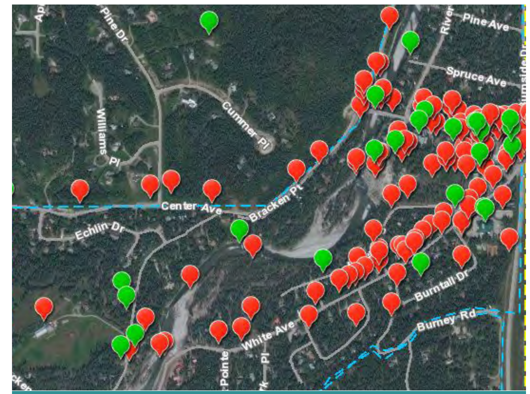
## MAY

**PHASE 3**
- Community Affirmations & Directions Workshop
- Establish methods of Implementation

# WHAT WE'VE HEARD...

COFFEE CHATS


COMMUNITY SOUNDING BOARDS




ONLINE FEEDBACK MAP

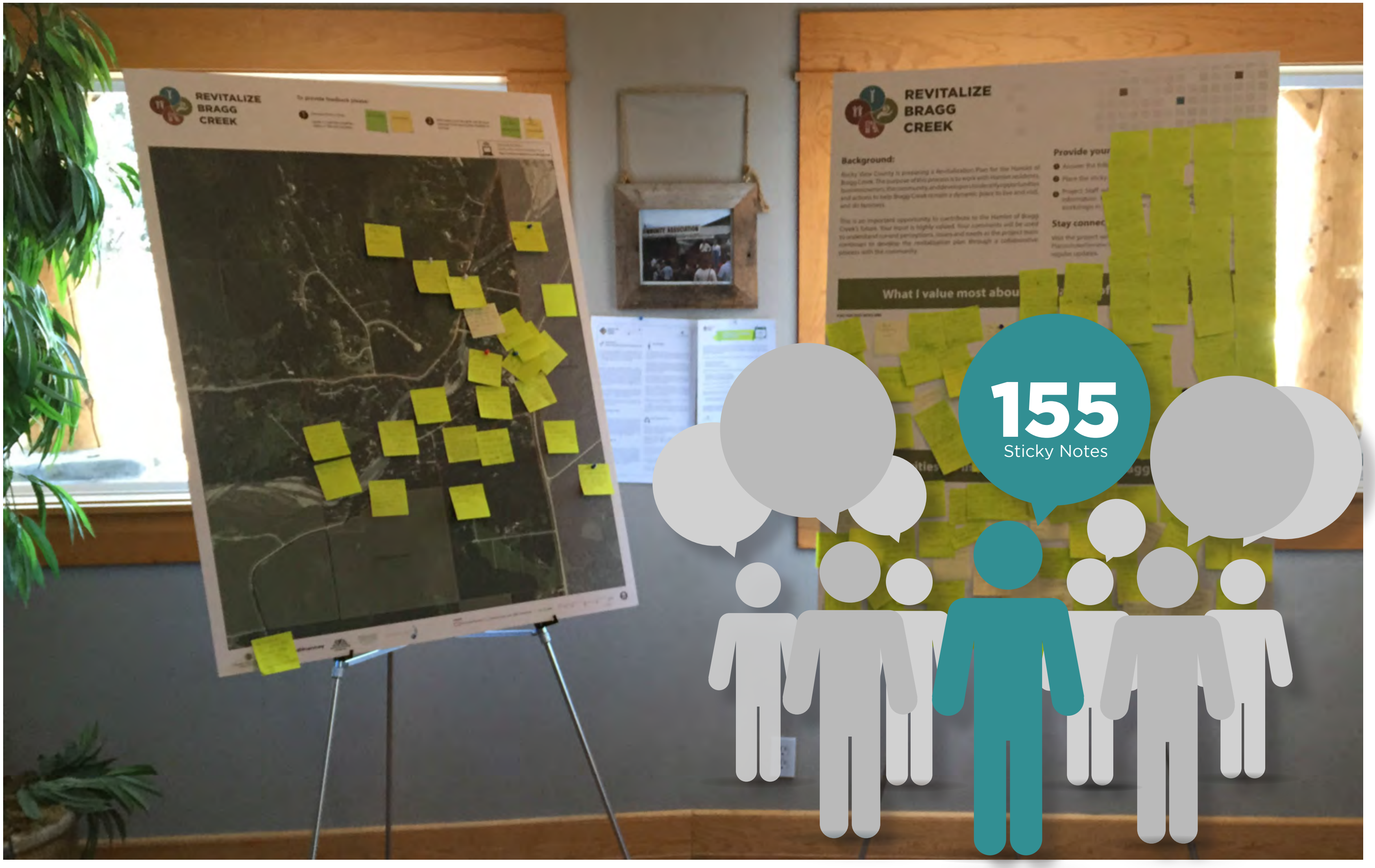
TEAM MEET & GREET

STAKEHOLDER WORKSHOP

STORE-FRONT HOURS

# COMMUNITY SOUNDING BOARDS

March 9 - April 9



# COMMUNITY SOUNDING BOARDS

March 9 - April 9

## What I value most about the Hamlet of Bragg Creek is...

- Small-town community feel
- Opportunities for healthy outdoor recreation
- Proximity to the mountains
- Trees!
- Community Spirit and community working together
- Wildlife and the community's natural setting
- Seasonal Festivals
- Trails Association - Great work so far!
- Well maintained properties that fit with the community character
- Dark skies
- Compact Community
- New Hamlet Servicing

WHAT WE'VE HEARD...

# COMMUNITY SOUNDING BOARDS

March 9 - April 9

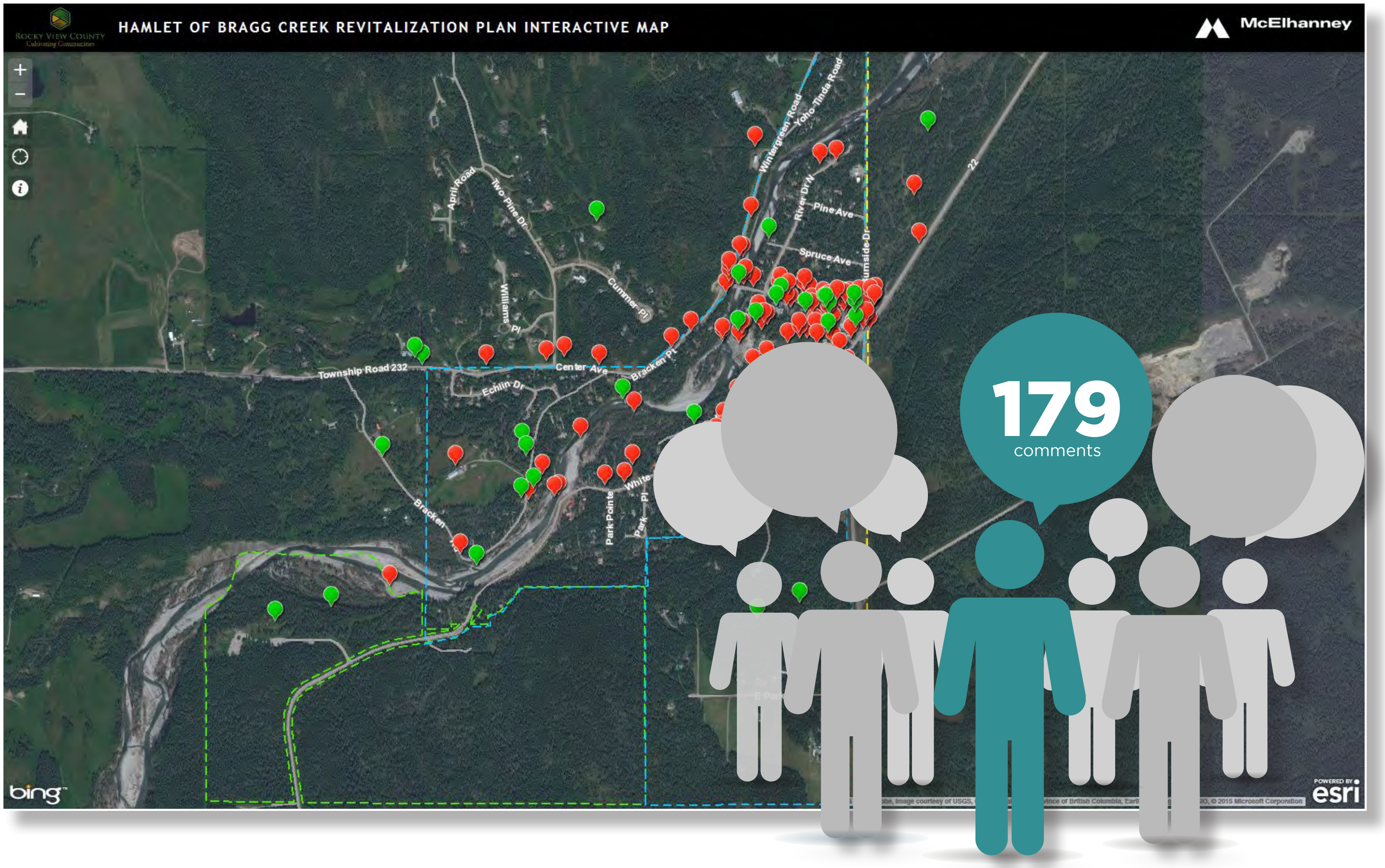
## My priorities for improving the Hamlet of Bragg Creek are...

- Outdoor Community Hub (picnic area / town square / amphitheater)
- Riverfront public area / better river access
- Improve HWY intersection triangle (safety / appearance)
- Housing Diversity / Affordability
- General Hamlet tidiness and property upkeep
- Speeding / Noise Enforcement in the Hamlet
- Recreational activities for all age groups (skatepark / Splash Park / YMCA)
- Overnight accommodation
- Screening & beautification in targeted areas
- Promotion as "gateway to Kananaskis"
- Accessible and user friendly sidewalks / pathways with proper wayfinding
- Parking controls / Enforcement
- Celebrate and recognize Bragg Creek's history
- Basic Infrastructure Repair (roads / paths)
- Consistent design character & guidelines (signage / fencing / buildings)

WHAT WE'VE HEARD...

# ONLINE INTERACTIVE MAP

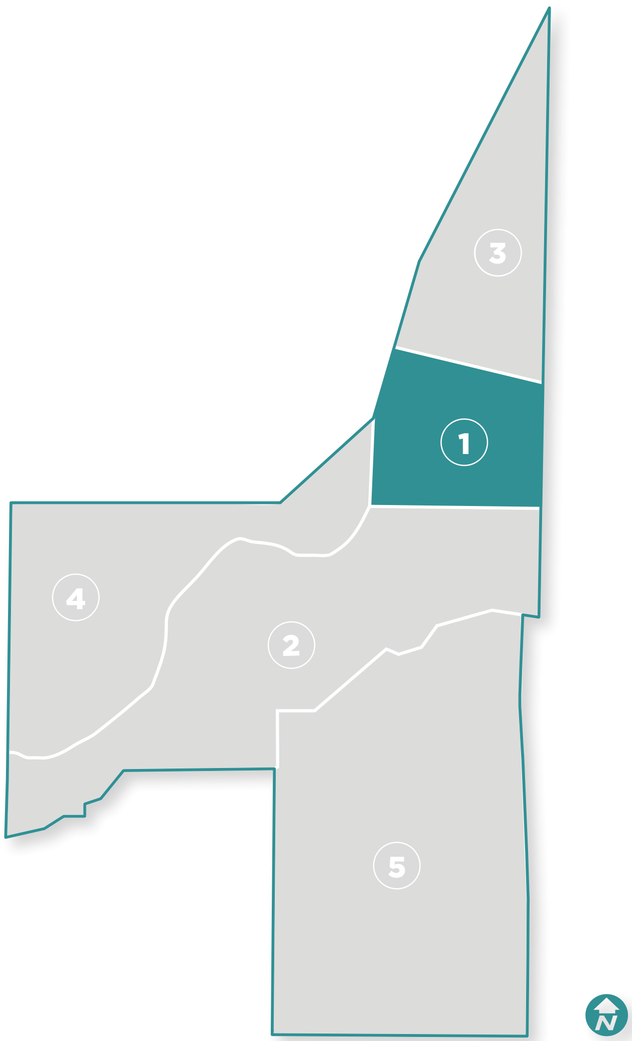
March 9 - April 9



WHAT WE'VE HEARD...

# ONLINE INTERACTIVE MAP

March 9 - April 9




## AREA 1 GENERAL THEMES

### I wish this could be...

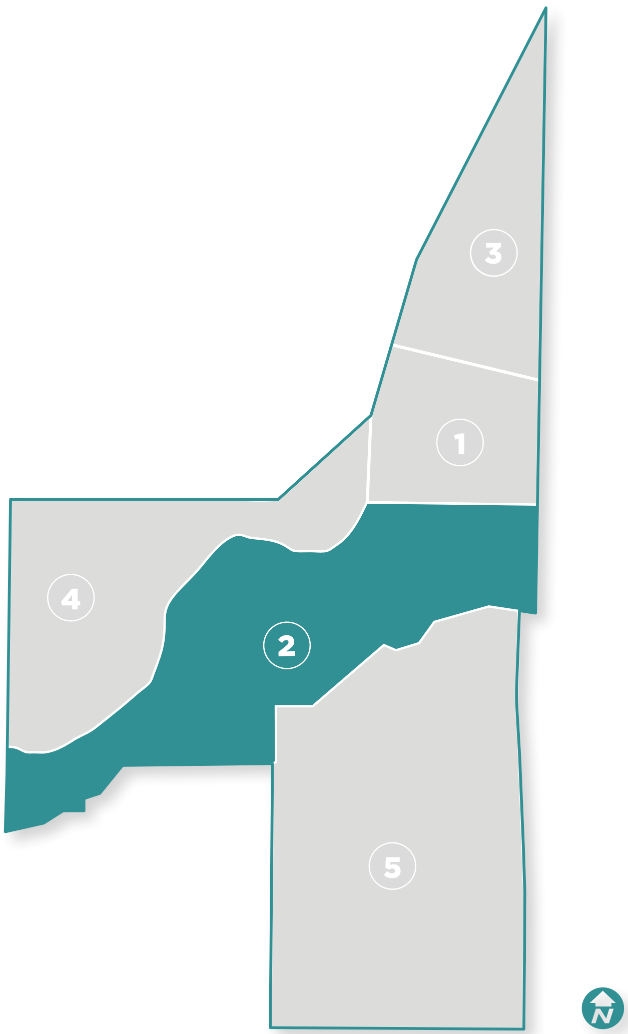
- Wayfinding / Community info at the T-intersection of Balsam Ave and Wintergreen Rd with better pedestrian access
- Served with more than one egress point
- A publicly accessible river recreation area west of the Herron property linked by a network of paths
- A natural park/picnic/event space on the Herron property
- Beautified connections between the malls with potential for public open space
- Tidied and wildlife proof garbage areas
- Less business vacancies at Bragg Creek Mall and a cleaned-up/improved appearance
- Consistent design standards that reflect the Hamlet's rustic/country identity
- A fully connected system of pathways that are rehabilitated to not hold water
- Focused streetscape improvements and curb appeal along Balsam Ave
- Consistent and professional business signage (remove sandwich boards)
- Special attention paid to the problem intersection as an entrance to the hamlet

### I like this because...

- The walking routes and river view from Balsam Ave bridge
- The rustic appeal of some of the hamlet core's commercial buildings
- Motorcylists have their own designated parking at Bragg Creek Mall

# ONLINE INTERACTIVE MAP

March 9 - April 9




## AREA 2 GENERAL THEMES

### I wish this could be...

- A safer controlled intersection leading onto White Ave
- Improved streetscaping and pedestrian friendly White Ave including:
  - Indented on-street parking areas
  - Street-lights
  - Proper curbs / physical separation of sidewalks
  - Street-lights
  - Wayfinding signage
  - Maintenance and clearing year-round
  - Proper drainage
- Address messy areas of individual property owners like run-down fencing
- Transform White Ave into a commercial district
- Smaller lot sizes along White Ave to create a more interesting pedestrian experience
- Pave all residential roads
- Pedestrian bridge linking West Bragg at the terminus of White Ave
- Connected pathway system linking important community nodes
- Recreational use on County-owned land

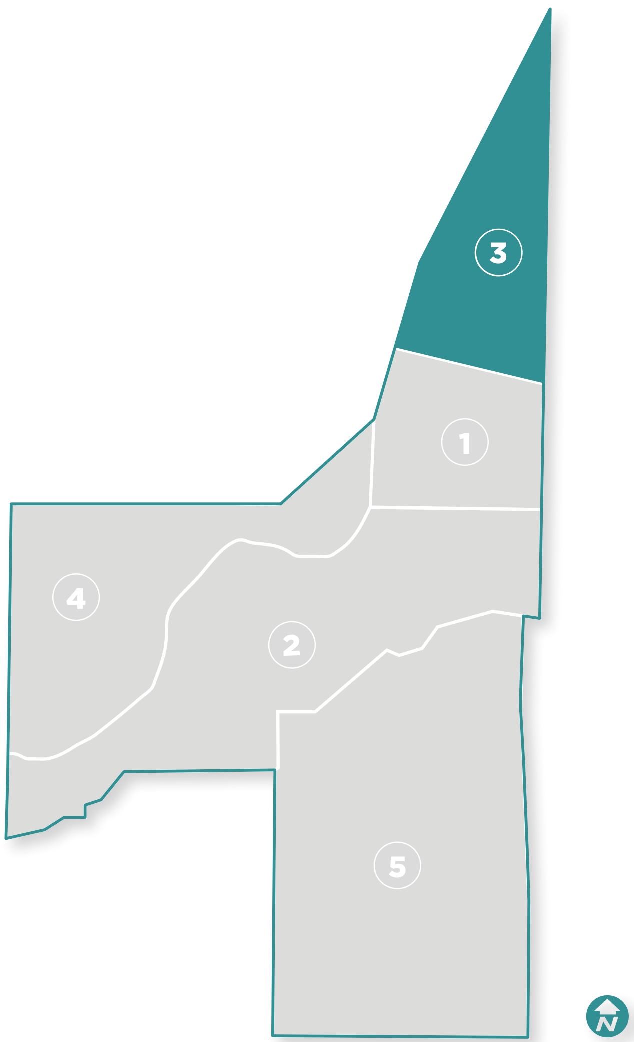
### I like this because...

- The businesses and services at Front Porch Square
- The Bragg Creek Centre is a community hub
- Small-town community character

WHAT WE'VE HEARD...

# ONLINE INTERACTIVE MAP

March 9 - April 9




## AREA 3 GENERAL THEMES

### I wish this could be...

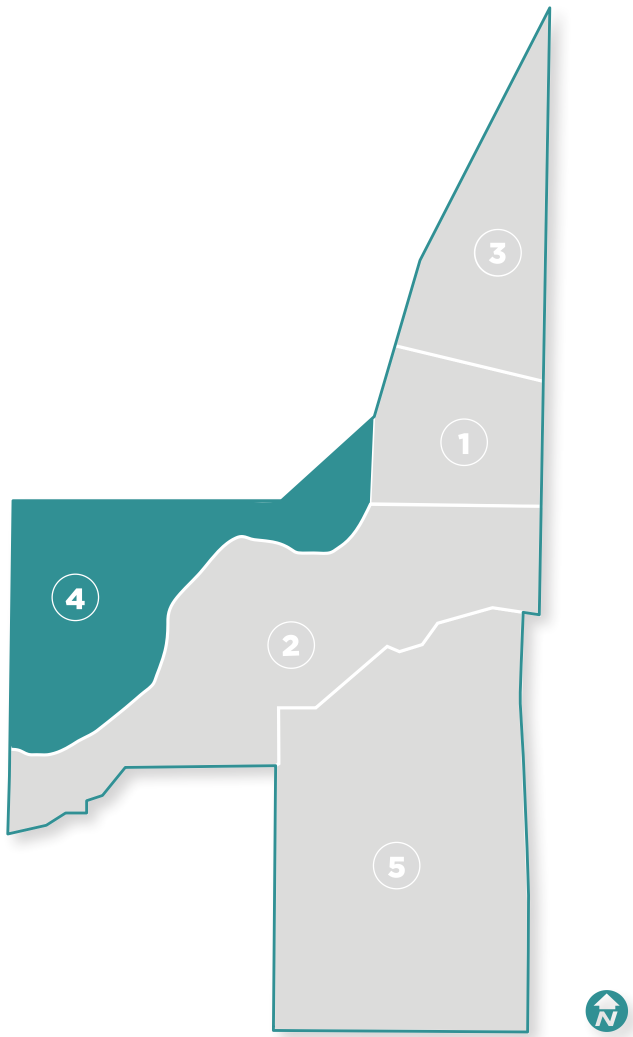
- Safer driving speeds along Wintergreen Rd and HWY 22 entering the hamlet
- Greater distinction between local roads and grassed areas to avoid damage caused by automobiles
- Safer pedestrian paths along Wintergreen Rd
- A pathway system connecting Redwood Meadows to the Hamlet
- Designated parking to address problem of those looking for River access

### I like this because...

- The Tsuu T'ina Nation are great neighbours
- Access to the river

# ONLINE INTERACTIVE MAP

March 9 - April 9




## AREA 4 GENERAL THEMES

### I wish this could be...

- A paved, maintained (year-round) path from West Bragg to Town along Centre Ave
- Improved signage along Centre Ave
- Centre Ave was safer for cycling
- The Elkana property was used for housing and incorporated nature trails
- Berms along the Elbow River to protect homes from flooding and incorporated walking trails so people can enjoy the river again
- More of a focus along the edge of Bragg Creek - namesake of the community
- Designated River access

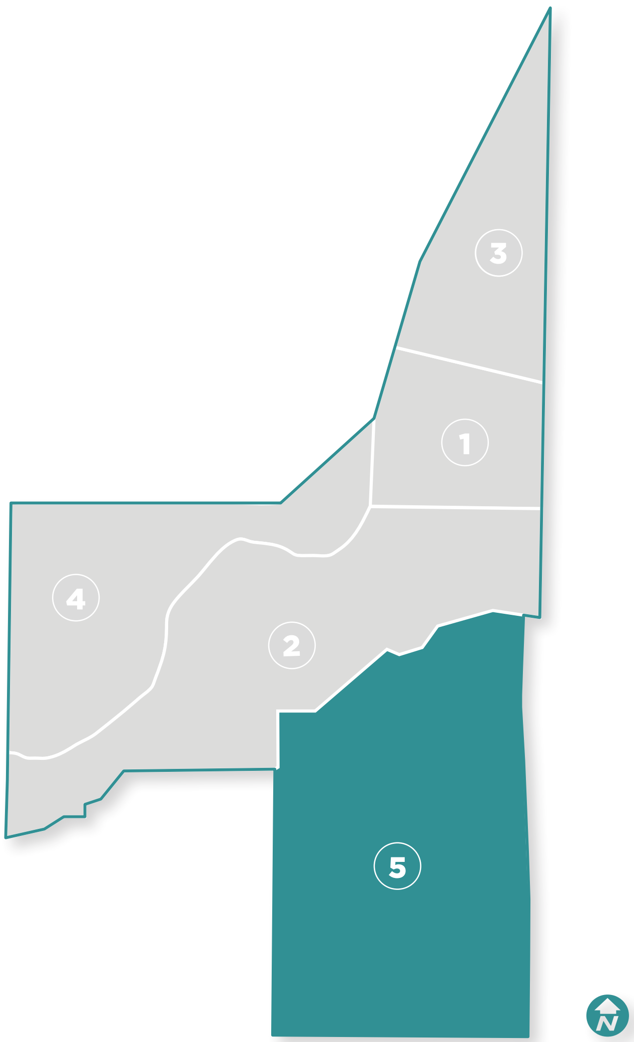
### I like this because...

- West Bragg Creek Transcanada trail will provide a safe opportunity for cyclists and pedestrian traffic to and from the Hamlet
- There are opportunities to enjoy the river and play!
- The Elkana Pump House supplies many families with safer water
- Historic preservation of the old dance hall
- Proximity to the Provincial Park

WHAT WE'VE HEARD...

# ONLINE INTERACTIVE MAP

March 9 - April 9




## AREA 5 GENERAL THEMES

### I like this because...

- This is proposed land for future development and a logical growth area
- Larger scale development could attract visitors on HWY 22
- Opportunities for Rec-center near Banded Peak School

WHAT
WE'VE
HEARD...

# STAKEHOLDER WORKSHOP
March 25th

## 5 actions that should be the top priority for the Revitalization Plan:

### TABLE GROUP 1

- Connection to Servicing
- Address sidewalk repair / maintenance
- Central Town Centre / Park Space
- Hamlet Amenities: public toilet / outdoor fitness area / tourism services
- Business appearance

### TABLE GROUP 2

- Community Charter / Vision
- Economic Modelling
- Diversity of Housing
- Trailhead Community
- Mixed-Use Town Centre

### TABLE GROUP 3

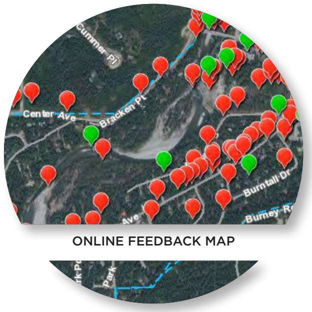
- Beautification
- Connectivity
- Diversity of Housing
- Design Guidelines
- Accommodating Commercial Growth

### TABLE GROUP 4

- Community Services
- Community Enhancement
- Engage Mall Owners
- Housing: Affordability / Seniors / Density
- Stakeholder Group Connectivity

# WHAT WE'VE HEARD...


COMMUNITY SOUNDING BOARDS


ONLINE FEEDBACK MAP


STAKEHOLDER WORKSHOP


STORE FRONT CHATS


COFFEE CHATS

## TOP FIVE PRIORITIES HEARD FROM THE COMMUNITY:

Improved Pathways / Connections

Housing Diversity

Business / Economic Development

Beautification / Community Enhancement

Infrastructure / Safety

# APPENDIX C

SECOND ROUND PUBLIC ENGAGEMENT:
WHAT WE HEARD REPORT

REVITALIZE
BRAGG CREEK

## ENGAGEMENT OVERVIEW

The project team held its final community consultation event on the Bragg Creek Revitalization plan on Wednesday, September 30th. The Open House and presentation was held to present the First Draft of the Revitalization Plan, gather feedback, and gain further insights as to whether the public is in support of the Plan. For those who weren't able to attend the Open House, an online feedback form was posted from October 1st to October 9th to allow citizens to review the Draft Plan and provide input and feedback.

## WHAT WE ASKED

- Participants were provided with a copy of the First Draft of the Revitalization Plan and asked to review a series of panels which highlighted the key recommendations proposed in the Plan. Participants were then asked to indicate whether they supported the recommendations

○ **Strongly Support** ○ **Somewhat Support** ○ **Non-Support**

Participants were also asked for any additional comments regarding each recommendation.

- Participants were asked what they liked about the Plan, what could be improved and for any additional comments

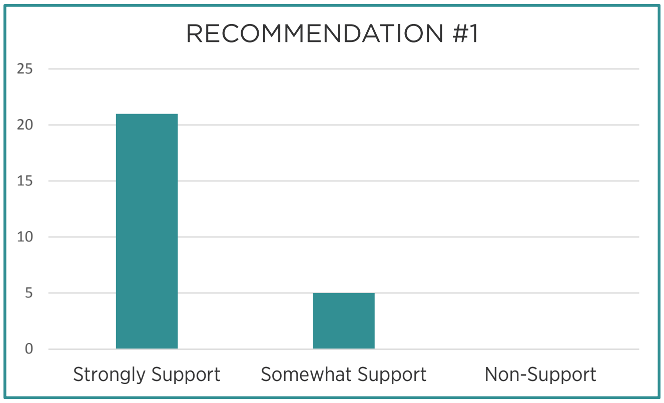
## RESPONSE SUMMARY

The following graphs summarize all of the input that was received at the public open house on September 3oth as well as from online feedback between October 1st to October 9th.

# 01

### HAMLET WIDE: PREPARE HAMLET DESIGN GUIDELINES

Strengthen existing design guidelines in order to achieve a sense of visual consistency & character that makes the Hamlet of Bragg Creek a truly special place to live and visit.



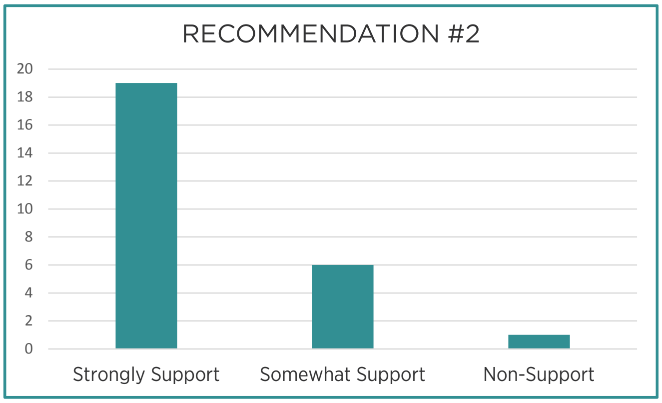

### ADDITIONAL COMMENTS

- Building height from raised foundation? See new Esso Station.
- Any chance we can fix some of the design mistakes that exist (i.e. gas station).
- Strongly support (recommended action) (x4)
- Guidelines like for the "new" gas station??
- Strengthening the uniformity of the buildings, housing, the stores and restaurants would be beneficial in harmonizing the core and drawing in visitors to enjoy the space and spend more time there.
- Does that mean the new service station could have been avoided?
- Be very stylish with the guidelines.
- Include budget to retrofit.
- Penalties for non-compliance
- Flood Resilient Design for site planning. Building materials, building height and architecture.
- Passover to local governance from RVC if Bragg becomes a proper Hamlet.
- Definitely ENFORCEABLE.
- Unless you have design committee with teeth, you end up with eyesores that don't fit in to the character of the community like the new service station.
- I support this for the commercial core but feel people should have design freedom on their residential lots. (x2)

# 02

## HAMLET WIDE: CONNECT THE COMMUNITY

Improve the pedestrian experience in the Hamlet through pathway and trail upgrades, seating areas, making it easier to get around via wayfinding, and better connections to the abundance of trails in the area.



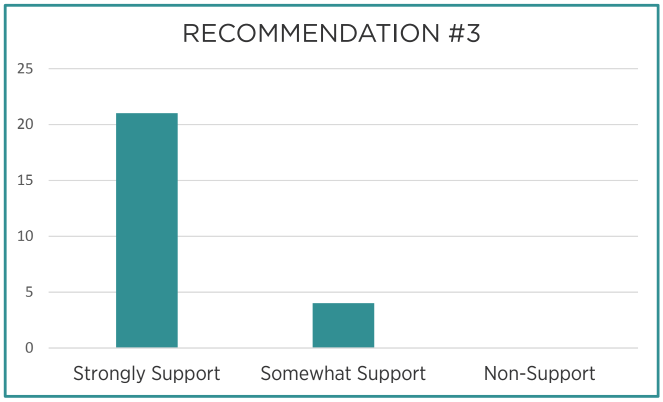

### ADDITIONAL COMMENTS

- Almost on a higher priority!
- Circulation and Connectivity is key. Like looped pathways and trailheads.
- My only concern is how to handle the volume of traffic through and into the hamlet.
- East side of the river up from Balsam (to Redwood Meadows) doesn't really allow for pathways. Would have to be on the otherside – Wintergreen Rd. side.
- Make this an example of a walkable community – bike racks please.
- Connect to Redwood.
- LED solar powered lighting to allow trail walking after dark. Lights could also "brand" each of the 5 trails.
- Connect to Tsuu T'ina business development plans.
- Attention to residential areas you are traveling through.
- We don't need or want tramping through our residential areas. Keep tourists in the commercial area to support businesses rather than leave their garbage and remove privacy and peace and quiet.
- I don't support the bridge to the West zone across the Elbow River—too expensive and of minimal benefit. Additionally the pathways in the West zone should be built along RVC Public lands where possible.
- I support the concept of an Entry Gateway but don't support realigning White Avenue to funnel it through the Gate on Balsam Avenue.

# 03

## HAMLET WIDE: MANAGE FLOOD HAZARD

Identify flood prone areas and minimize the risks and costs associated with flooding. Provide guidelines for the use/non-use of flood prone areas.



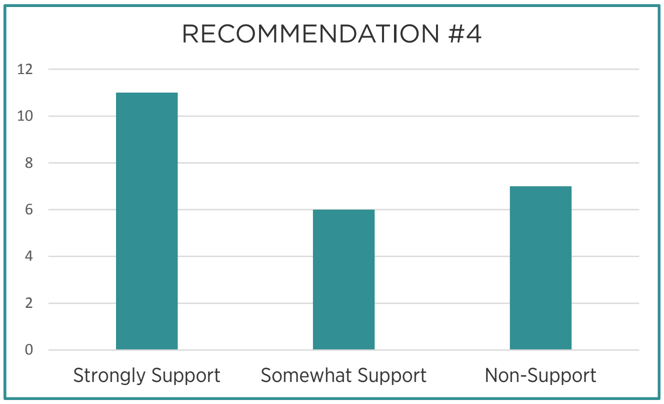

### ADDITIONAL COMMENTS

- Is there room to create enough dry creek beds to handle the possibility of a major berm compromise?
- Elevate buildings: no need for dams or dry dams. No further high density development, more floods – even bigger – will come.
- Landscaping design before building
- Having a plan in place without the provincial and federal government regarding any future flooding and having a say as a resident on what these plans of action are would encourage better understanding in any future buildings.
- Doesn't help those whose homes are already there. Only helps those who are new builds.
- This is conditional on an adequate amelioration of the extreme risk that the current flood plain presents to everyone in the GBCASP zone. Residential. Ideally all development should be discouraged on the flood plain.
- The flood mitigation project that has been engineered for RVC but not implemented needs to go through a proper public consultation. If implemented, the project and Revitalize Bragg Creek need to be coordinated.
- The province is currently updating flood hazard mapping—need to integrate and address in all aspects of the revitalization plan.
- I like the flood resilient design for housing. Allow room for the river—structural dykes should be placed as far back as possible.

# 04

## HAMLET NORTH: ENCOURAGE RESIDENTIAL INFILL

A diversity of housing types can be achieved through implementing several residential infill strategies. The illustrations below highlight potential infill options for laned parcels that are common to Hamlet North.



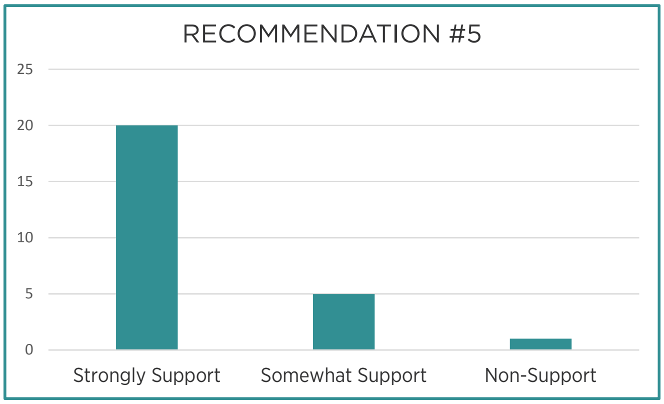

### ADDITIONAL COMMENTS

- Is there the possibility to create multi-unit density homes where one lot could support more than 2 units?
- Means just more tax payer funded rescue & relief when the next flood hits.
- How will infill subdivision benefit the existing lot holder?
- Bragg Creek's rural character is lost when the density is too high.
- This is why people come to live in Bragg Creek – larger lots, dark skies, privacy and quiet. By reducing lot sizes, you remove these attractions and turn Bragg Creek into just another overcrowded area at the expense of nature.
- The problem is that it remains focused on single family residential housing only. What is needed is some sites for conventional multi family in the Hamlet. Options are row housing, small blocks of apartments etc. Without these options housing will always remain unaffordable. Auxiliary housing units need to be carefully regulated so that they don't become houses that are bigger than the original one.
- Strongly support provided these lands or the new buildings are flood proofed.
- Would depend on additional bridge/emergency egress.
- Area North of the Elbow River is on higher ground—better option for increased housing diversity

# 05

## HAMLET NORTH: IMPROVE TRAILS, WAYFINDING & RIVER ACCESS

Connect the un-connected in Hamlet North and incorporate wayfinding signage, and riverfront access—taking advantage of the untapped potential of the river as a public resource and ability to invite further tourism.



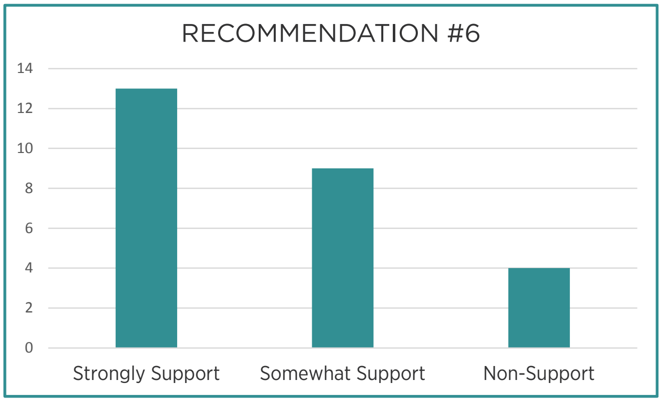

### ADDITIONAL COMMENTS

- Very nice plan
- If the "Adventure Centre" was simply a board walk and sitting area, this would be a great start.
- Ensure "No Trespassing" and people (visitors) not making their own paths.
- No opinion really. All you guys talked about was the adventure centre (which I think is a great idea) and didn't mention all the other development. I suspect this is by design. Condo's, hotels – I do not support too much of this.
- As it stands right now we personally find it somewhat difficult to find some of the trails/access the river in a safe way without injuring ourselves. Trails and accessibility since the 2013 flood are slowly being repaired but still needs work.
- Solar powered lighting for evening walks
- No place to have events (i.e. Outdoor Concerts)?
- This will concentrate the tourists in the commercial core where they belong and can make businesses more viable.
- The Report seems to totally ignore the Yo Ho Tinda and North West zone. Keep ion mind that this is a major access to the Elbow to tourists and locals.
- Pedestrian & bicycle safety is a priority on Wintergreen Rd.
- If the Greater Bragg Creek Trails Association agrees to help, someone from that organization will need to provide leadership.
- Agree with designated parking and river access and safer walking on Wintergreen Rd.

# 06

## HAMLET CORE: INCREASE DENSITY and HOUSING DIVERSITY

Improve housing diversity, increase density, and cater to a variety of specific housing needs, through the addition of live/work units, row housing, commercial/residential mixed-use developments, independent seniors living units, and overnight accommodation.



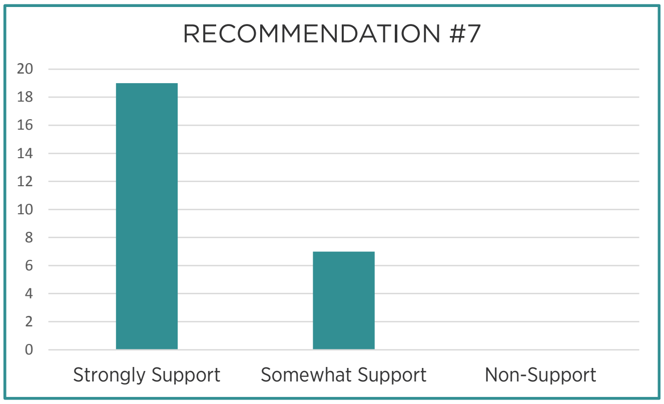

### ADDITIONAL COMMENTS

- Careful-don't want it too dense as that would detract from the quaintness of the Creek...
- Very important in the community to have all ages interacting with each other. Strongly believe we need all ages to live and work with each other to instill and create a strong community.
- How do you avoid real estate owners who are absent? In Canmore this is a problem.
- Accommodations not more than 10 units to keep character + uniqueness of the hamlet.
- Limit infill to 2 storeys. Limit overnight accommodations to 10-30 units
- But not any of photos showed suitable design.
- The north boundary of the Hamlet Core is the south side of Spruce Ave. I suggest that it should be the north edge of the lots along Balsam Avenue. There is a "lane" on that boundary. The benefit is that more land is available for residential properties.
- No one in their right mind would want to live above businesses in the commercial core with the incessant noise of traffic, particularly motorcycle and noisy cars.
- Agree with second stories on existing buildings, disagree with increasing housing diversity in the core.
- It is very hard to imagine the increases of density and building height suggested by your photos not destroying the character of our community.
- I do not support new development that could be flooded or the Adventure Centre (x2).
- Commercial development should go to the expansion lands. Core should be local traffic only. Seniors' residences should be close to commercial core.

# 07

## HAMLET CORE: DEVELOP RECREATION & PUBLIC SPACE

Increase the amount and quality of "places for staying"— inviting space that people want to use— and strengthen the sense of community as well as economic, social and environmental value within the Hamlet.



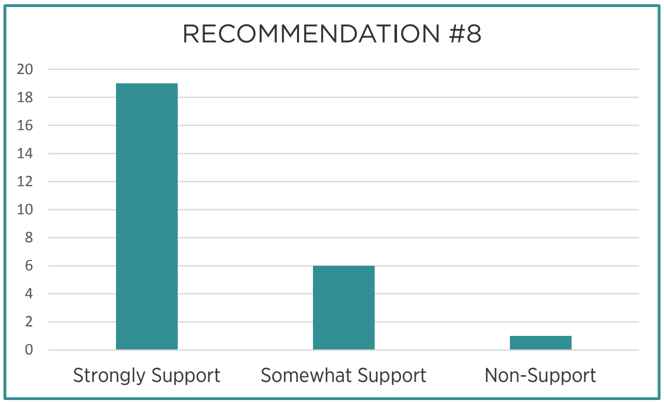

### ADDITIONAL COMMENTS

- This is the most important first step
- Love this!
- In order to bring in visitors we need to have some place of accommodations to provide demand and supply.
- Most locals avoid the town centre like the plague on weekends to avoid the crowds.
- Ensure there is a place for live music. Think of the gazebo in Revelstoke.
- Can it be covered during winter months to keep pedestrian shopping year round?
- If nothing else, the washrooms are needed.
- I like the town square/plaza concept. Not so keen on the staging area + adventure centre—concern over increased traffic volume
- I do not support the Adventure Centre, however 24 hr washrooms and parking are a very good idea.
- Like: town square & public plaza, aesthetic improvements, recreation opportunities, trailhead staging, open green spaces, water recreation.
- White Avenue is the perfect designation for hotels. Direct access to White has to stay open.

# 08

## HAMLET CORE: ENHANCE PUBLIC REALM

Focus on improving the image and quality of the public realm, enhancing local and tourist perceptions and attracting private sector investments.



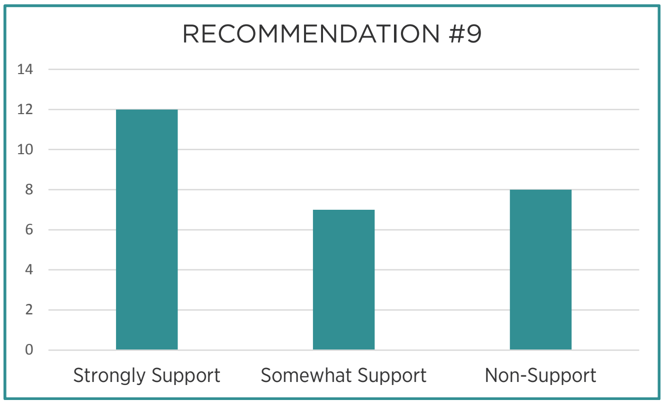

### ADDITIONAL COMMENTS

- I am concerned on traffic flow but love the idea of a feature gateway signage.
- Good idea, but entrance/exit needs careful consideration and planning.
- Gateway arch over the road is not supported.
- Avoid hardscaped pathways to prevent water build-up and allow waters to soak back into the soil.
- I don't support the elimination of on street parking by the wetland ditches adjacent to the road ways on Balsam and White Avenue. Customers in large vehicles or patrons for shops need a place to park.
- Like: gateway structure, streetscape enhancements, pedestrian connections.

# 09

## HERITAGE MILE: ENCOURAGE RESIDENTIAL INFILL

Heritage Mile presents unique opportunities to introduce a variety of housing types and infill strategies that respects the existing character of the area, while supplementing the growing needs of the community.



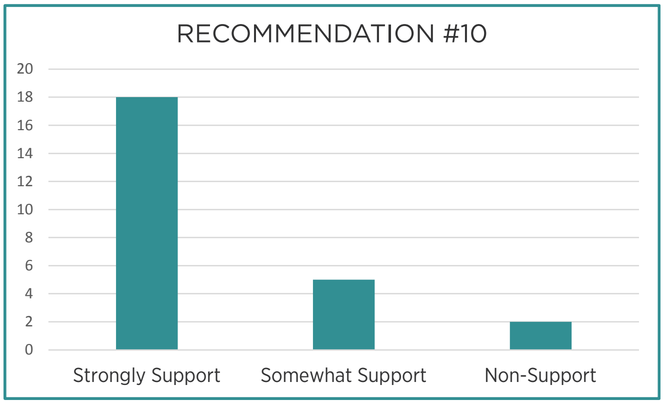

### ADDITIONAL COMMENTS

- It would be nice to encourage both restaurant and small hotels, B&B's and even higher density housing
- Great idea
- Unless you build high enough above the flood risk.
- Careful attention to type of housing.
- We've reached the carrying capacity and any more will destroy the environment that we all love.
- Strongly support provided these lands or the new buildings are flood proofed.
- Commercial/retail OK South of the River and South of White Ave—out of flood hazard area. Housing diversity only if not in the flood plain.

# 10

### HERITAGE MILE: DEVELOP TRAILHEAD & PARK

Develop a staging point with appropriate parking areas, and amenities for trail users along White Avenue and incorporate parks and open space in the design.



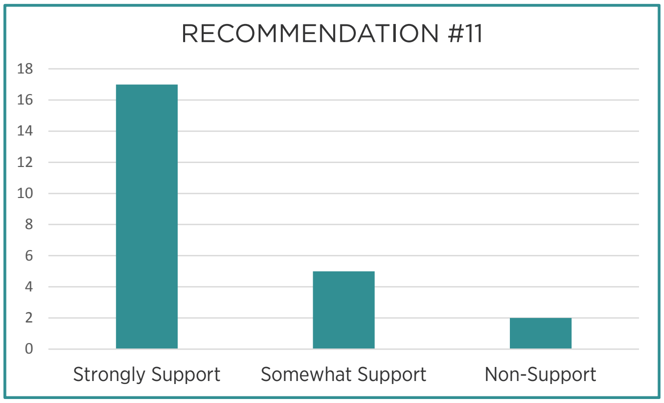

### ADDITIONAL COMMENTS

- Yes – create a bike park/skate board park
- Very nice
- Parking to draw in visitors to access the trail heads would be beneficial to make it a cohesive meeting centre.
- Keep the tourists out of the residential areas and close to businesses that we want to support.
- An ideal use of flood prone Municipal and Crown lands.
- The trail one could access from the new trailhead and needs to be built next.
- Current walking trail use is very limited due to poor design—mostly under water or snow covered.
- Like: enhanced pedestrian experience, development of trailhead park.

# 11

### HERITAGE MILE: ENHANCE WHITE AVENUE

White Avenue is a main commercial corridor and important pedestrian connection in the Hamlet. Future development should work towards solutions that increase overnight accommodation opportunities and improve its comfort and safety as a walking route for visitors and locals alike, acknowledging its potential to invite economic prosperity to the area as well as improve stormwater management in the process.



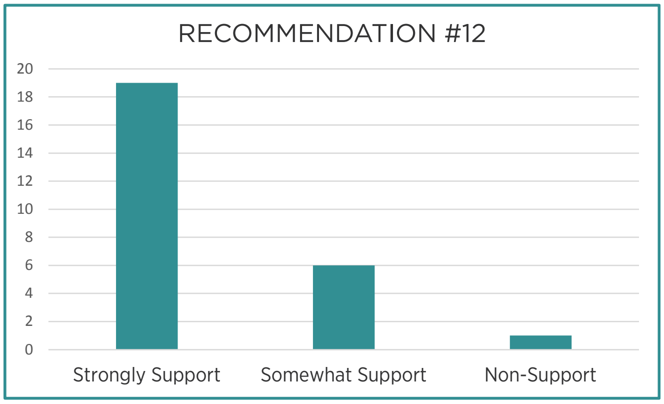

### ADDITIONAL COMMENTS

- Concerned that the walkway won't have proper drainage during winter months
- Love the beautification + the removal of current parking spaces in the road (especially as they aren't supposed to be there in the 1st place).
- Overnight accommodation is a loose-end. How many is really the question. We do not support large scale hotels or party houses.
- This is a good idea but one wonders where these pedestrians will park as we do not have enough parking, especially on the weekends.
- White Avenue needs on street parking period.
- Undecided.
- Who pays for sidewalk/path maintenance
- Alberta Transportation needs to be on-board as well.
- I like the streetscape improvements, however, I am not supportive of overnight accommodations in or near residential neighbourhoods.
- RVC needs to take over legal responsibility from AB Transportation for White Ave, including the pathway, so it can be upgraded or replaced.
- Needs to be flood proofed first!
- Like: improved comfort and safety, improved stormwater management.
- Disagree with overnight accommodation in this area unless it is flood proofed.

# 12

## HAMLET WEST: IMPROVE CONNECTIVITY

Link Hamlet West with Environmental Reserves (access to areas that offer interpretive and natural experiences) and the Hamlet Core (via a trail link system and the development of a pedestrian bridge crossing).



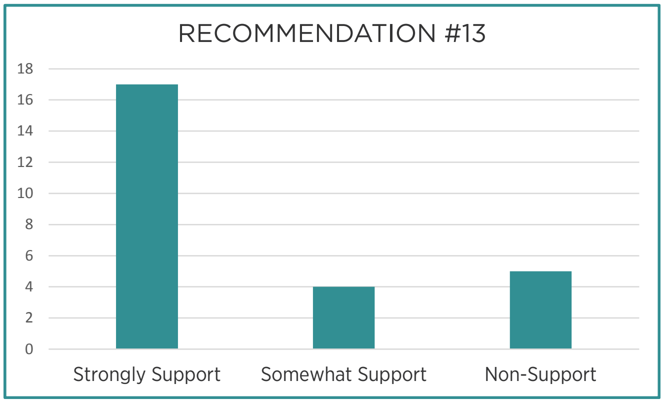

### ADDITIONAL COMMENTS

- Not first priority
- Great idea.
- Another bridge would help significantly as the only bridge carries a heavy traffic flow. Pedestrians would benefit.
- Hamlet-West needs to be serviced with water & sewer first. That is a priority. Not a pedestrian bridge.
- Needs to be emergency egress. Not just pedestrian bridges.
- I don't support the pedestrian bridge because of costs and maintenance and minimal benefit
- I do support trails enhancements on Municipal lands. People can also use the area safely.
- That will be a very expensive pedestrian bridge.
- Like: improved connectivity, pedestrian emergency egress
- There is potential for housing diversity and accommodations in this area (outside of the flood plain).
- Trail maintenance!

# 13

## HAMLET EXPANSION: DETERMINE FUTURE STEPS FOR DEVELOPMENT

Provide clear direction on the requirements for future development, including a new Area Structure Plan which addresses land use, transportation and open space — supported by technical and servicing studies — or a comprehensive amendment to the Greater Bragg Greek (ASP) which addresses these development concerns.)




### ADDITIONAL COMMENTS

- Nice.
- We have never supported the present Area Structure Plan for the expansion lands. The whole plan for the expansion lands needs to reviewed/changed until full acceptance has been achieved.
- Well done – let's get it started! Where is the $ coming from?
- Could this be a chance to develop micro-homes reflecting a different approach to living in nature and natural resource consumption? Perhaps all homes are solar/geo-thermal/wind powered.
- This land is non flood plain and the best place for future residential development. Current owners need to be considered carefully.
- Some of the ideas sound too good to be true. I am not sure that RVC would enforce the ideas. The development appeal board has the powers to relax all the rules, bylaws and developers get away with their plans.
- Should be up to the landowners there whether they support it or not.
- At least this area is not flood prone. The roads (access/ egress) needs to be addressed with AB Transportation before proceeding.
- Opportunities for residential, commercial, institutional, seniors housing, cluster housing, infills. Not sure about light industrial in this area, might be better near transfer station.

## 1 WHAT DO YOU LIKE ABOUT THE DRAFT REVITALIZATION PLAN?

- Great longer term (i.e >1yr) vision
- That it exists and gathers momentum
- Lead by professionals
- One other thought would be to ensure that residential row housing has retail services built into the development reducing the need for vehicle access for local residents.
- Conformity – a unified idea on how to make the Hamlet look similar, balance, cohesive unlike Cochrane which all new development is out of character completely with their main street.
- Good intentions, but you lack understanding of the power of Mother Nature. The 2013 flood was the 3rd of its size in 120 years. It wasn't even a 100 year flood! Over developing Bragg Creek is a recipe for disaster.
- Love the connectivity, walkability and vision for a community that I want to be proud of to live in!
- Almost everything.
- I like the park and placement of housing sites (except on seniors parcel).
- Entrance to Hamlet – this shows the exact entrance pre 1960's. But how do we get out and across the highway with free flowing traffic at speeds up to 110-120km/hr?
- Focus on walkability, community cohesion, and integrating nature.
- Revitalizing business community in the commercial core.
- Trails to the West to Kananaskis and pedestrian loop by Provincial Park, White Avenue and Balsam Loop.
- A white water park would work best with a dam at McLean Creek.
- Yes. This plan is started
- I like the plan, everything is in walking distance. One central parking area.
- Streetscaping, connectivity designs, parks and open space.
- Trails & Hamlet Design Guidelines.
- Good process!
- That it exists, has been professionally handled, and the fact that there has been opportunity for public input.

## 2 WHAT IMPROVEMENTS WOULD YOU MAKE TO THE DRAFT REVITALIZATION PLAN?

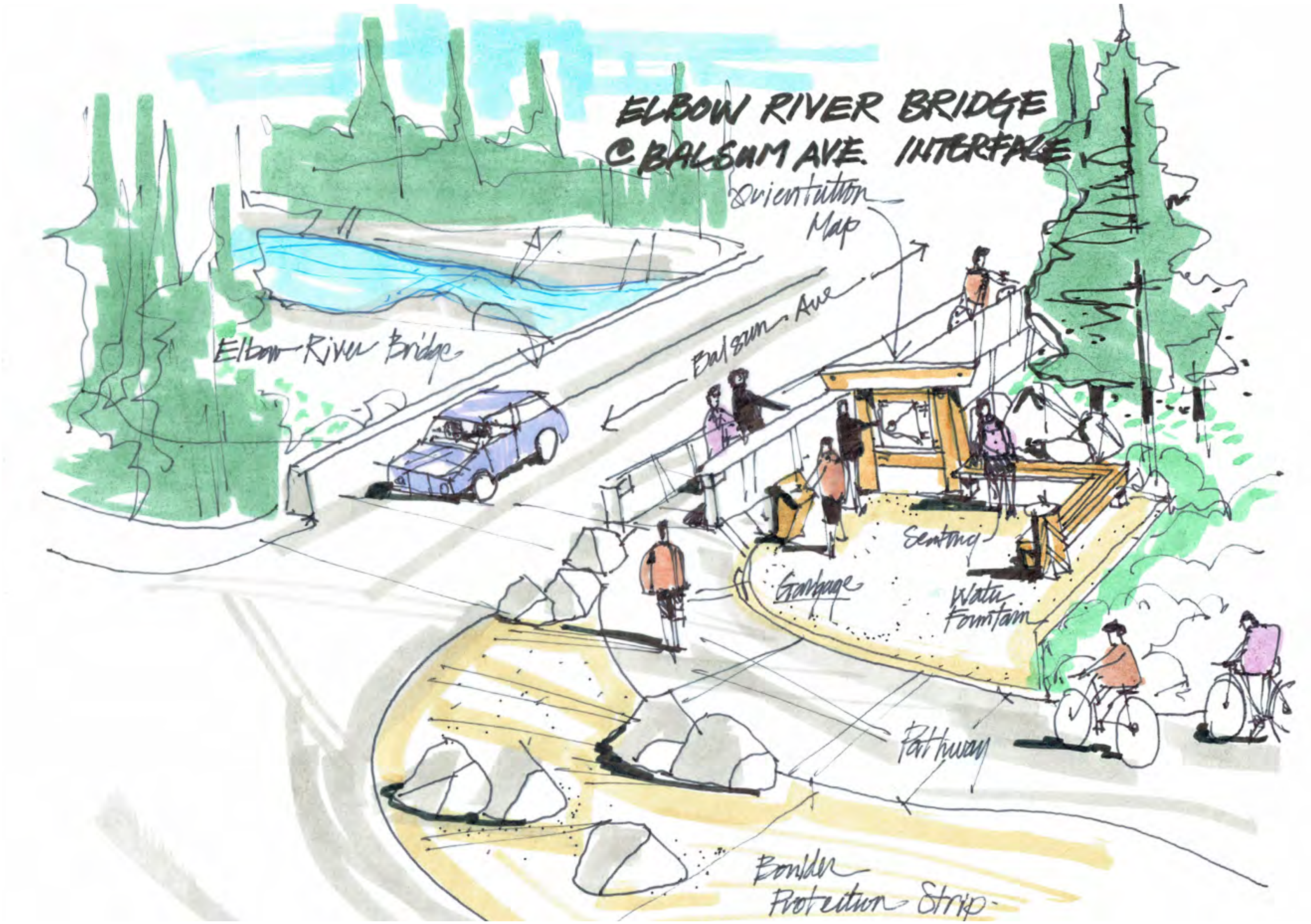
- Need to include some very short-term (i.e. 2015) action items for beautification that extend into the longer term vision
- Need/MUST find a solution to the horrible gas station.
- NONE. Dream come true
- There is no mention of light industrial. The closest industrial area is either in the North of Cochrane or East Calgary. There is no industrial synergy servicing the greater Bragg Creek, Redwood or Priddis area.
- Recommendation #13 (Expansion Lands) sucks. Redo/Re-think, starting with forced –through bulldozed area structure plan.
- Manage the shopping center (Bragg Creek Mall) to get in the game! Deal with the 4-way stop! We have incredible congestion on the weekends out here, so figure out how to fix that problem as the congestion will stop visitors from coming out here.
- How can adventure tourism not have a local campground (or glamp-ground)?
- Is the Hostel under emphasized as a historical element and future draw for international travelers?
- Anything for motorcyclists? Parking? Place to "show-off" bikes?
- What about a "city-hall" assuming Bragg Creek becomes a town in the future?
- This plan is entirely too urban. We are not a city nor do we want to be.
- Coordination with Wintergreen development and Tsuu T'ina.
- Design: logs & rock, frame. No taller than 2 stories.
- It sounds like Wintergreen is a done deal at this time. Development spending will not outweigh the problems. How do we get on and off the road when the average speed is 110-120 km/hr now?
- While it's important to have a revitalized commercial core, the plan fails to recognize that the more development you bring to an area, the less attractive and more destructive to the natural world it becomes.
- Address current traffic volumes & parking.
- Entrance to the hamlet core has to be revised as White Avenue can't be blocked. The current intersection is a disaster. We need to work with Tsuu T'ina on a deal to improve the entrance to the hamlet.
- Consider development plans in Wintergreen.
- Until there is flood mitigation in the Hamlet, much of the contemplated development is unwise. The Revitalization Plan needs to have some content coordinating/connecting it to a flood mitigation project for the Hamlet of Bragg Creek.
- Incorporate greater Bragg Area potential developments (Wintergreen, Elkana, Redwood Meadows) into planning.
- Incorporate new flood hazard mapping (Provincial) when available. Development should be discouraged in the flood plain.

## 3 ANY OTHER COMMENTS?

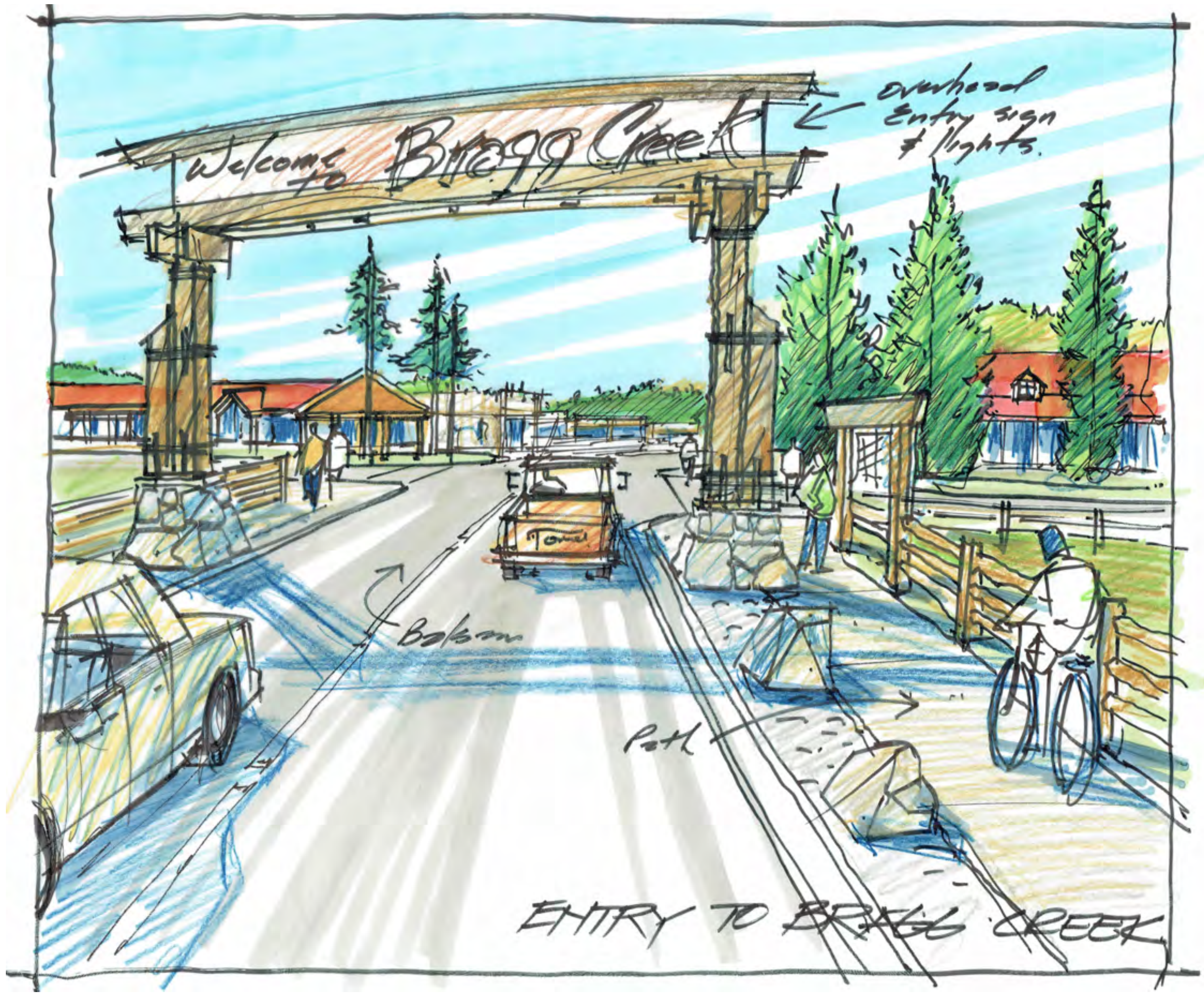
- There is currently no provision or strategy for staging the development. Currently development & improvement has had a negative aesthetic impact. The extensive development needs to be kept clean so that we continue to attract visitors.
- Biggest concern is the ability to handle traffic if the population of the area were to double/triple as well as the increased tourist traffic.
- Please don't let those people who don't want change make this another "paper project"! Bragg Creek needs a new vision in order to stay alive!
- Industrial development on the expansion lands plus the proposed/allowed high density will never have our support.
- Address the traffic, gridlock in the community. Important Issue and is becoming a safety hazard. Sidewalks need to be addressed as well.
- This is a beautiful area – keep it about outdoors, environment, physical activity + lifestyles conducive to outdoor sports. Keep the character and build a culture around it.
- Find resources to encourage programs that support the development of an active outdoor gateway to K-Country.
- Don't embrace the river. Respect it and back-off. I want to see the Area Structure Plan kept to-not modified.
- There are multiple demographics that could be primary in the economic plans going forward (e.g. adventure tourists). Have other demographics (e.g. motorcyclists, weddings) been evaluated for potential economic impact?
- I don't think this report will protect the community from unnecessary development. The basic thing missing is a rational for such aggressive redevelopment. Our Councillor asserts that Bragg Creek Is dying. I don't believe this is the case. No amount of development will fix the problems of local business which stem from competition from Calgary and a seasonal tourist customer base.
- Health Centre?
- Overall the plan looks good except your oversized overnight and multi-housing photos (we're not Banff). More rustic and less commercial looking.
- With all the river activity upstream from water intake for Hamlet, what impact could this have on the water quality?
- An agreement with the Tsuu T'ina is critical for the "triangle" at the entry point or the rest of the plan will suffer.
- What are the considerations for a second emergency access route for vehicular traffic?
- It is important to start with some smaller fundamental projects first, such as upgrading the Balsam and White Ave pathways.
- The County has to come up with a plan to make this project investment friendly. Can RVC have a support officer for screening an application before it is submitted.

# APPENDIX D

FULL SIZE SKETCHES




**BALSAM BRIDGE TRAILHEAD**

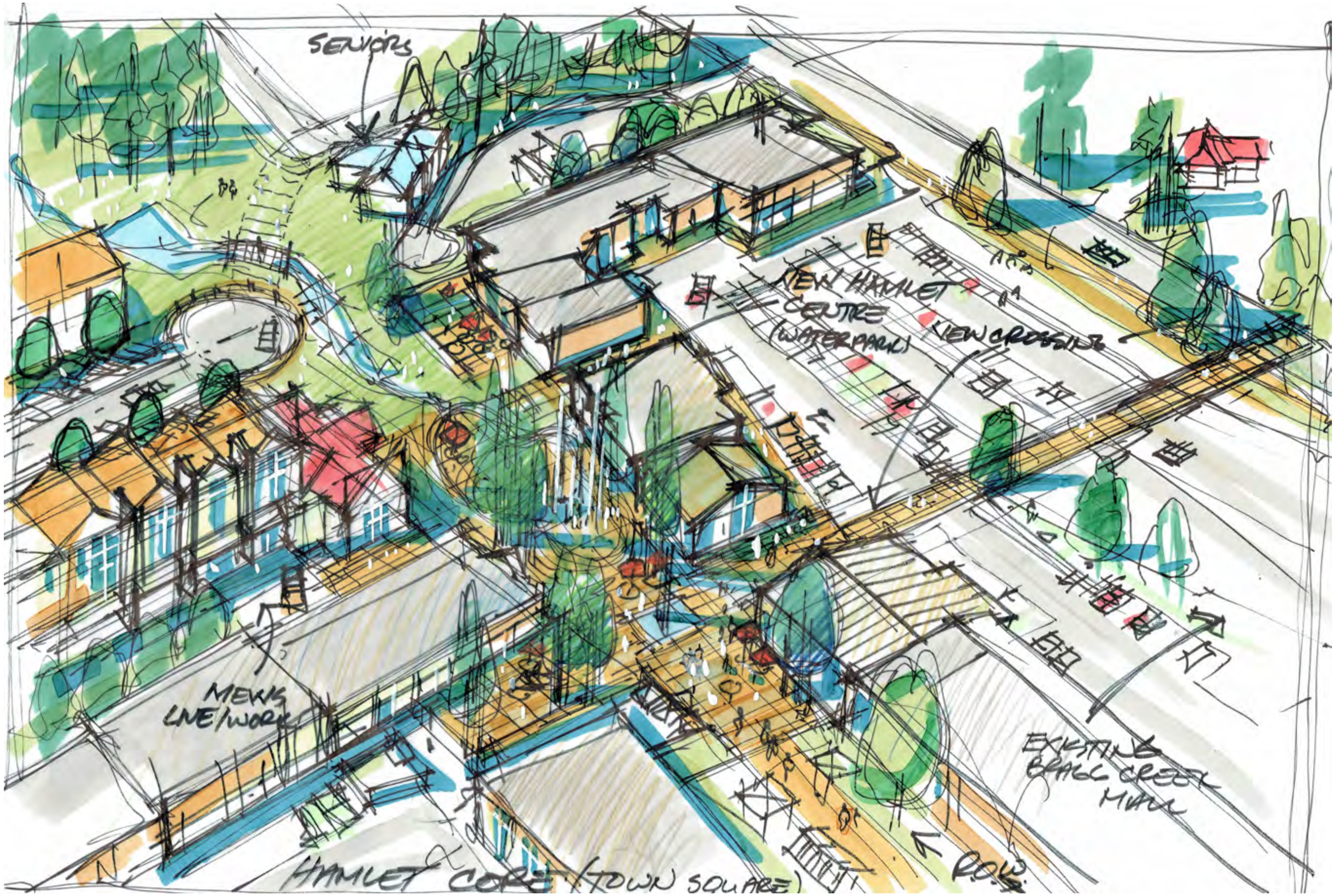



**GATEWAY TRAILHEAD**

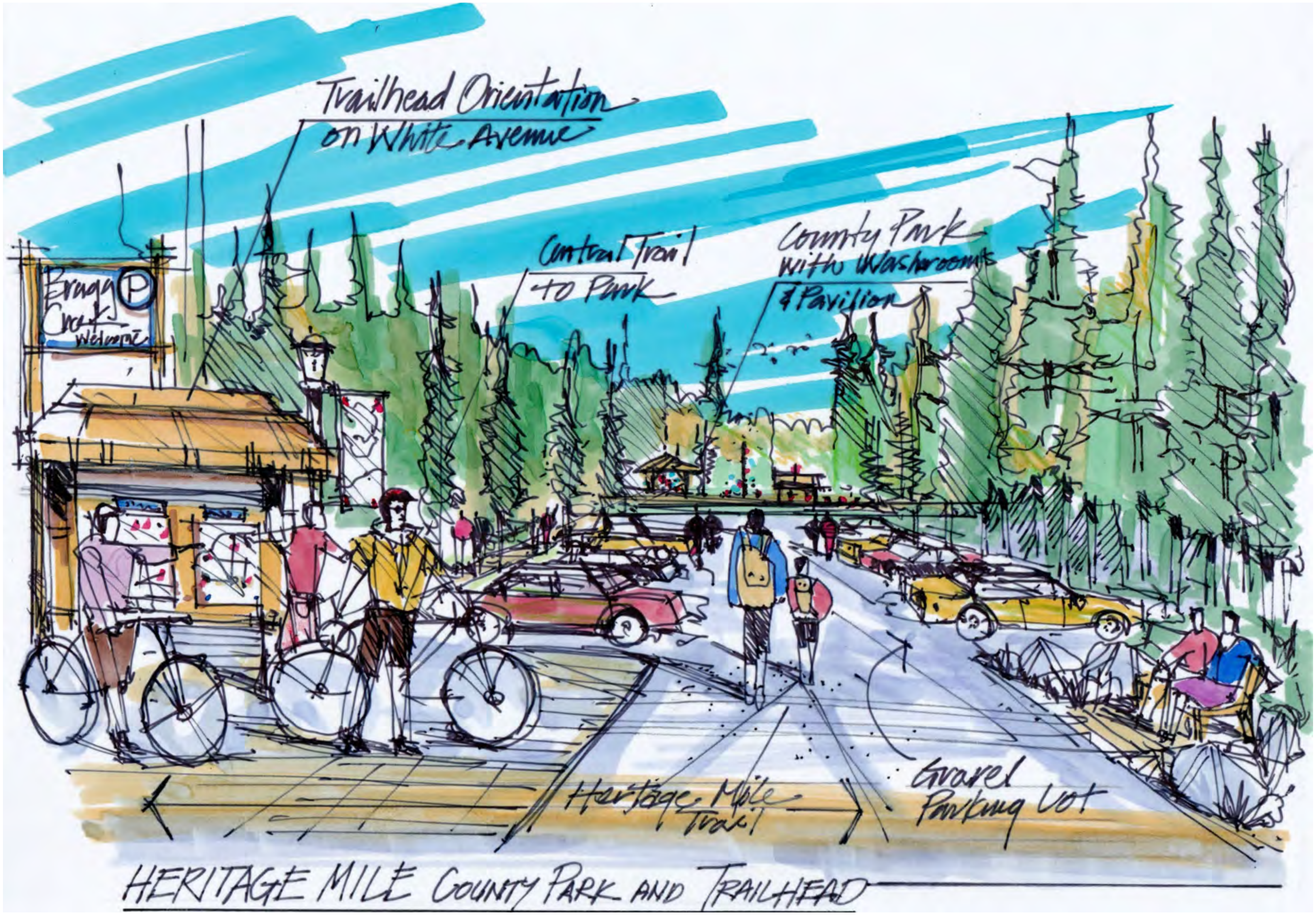

WHITE AVE TRANSITION
PATHWAY @ ELBOW RIVER
Orientation Map.
Elbow River
Garbage
Pathway
Bragg Creek
Seating
Water Fountain
Jersey Barrier
Highway Cycle Path


TOWN SQUARE / PLAZA

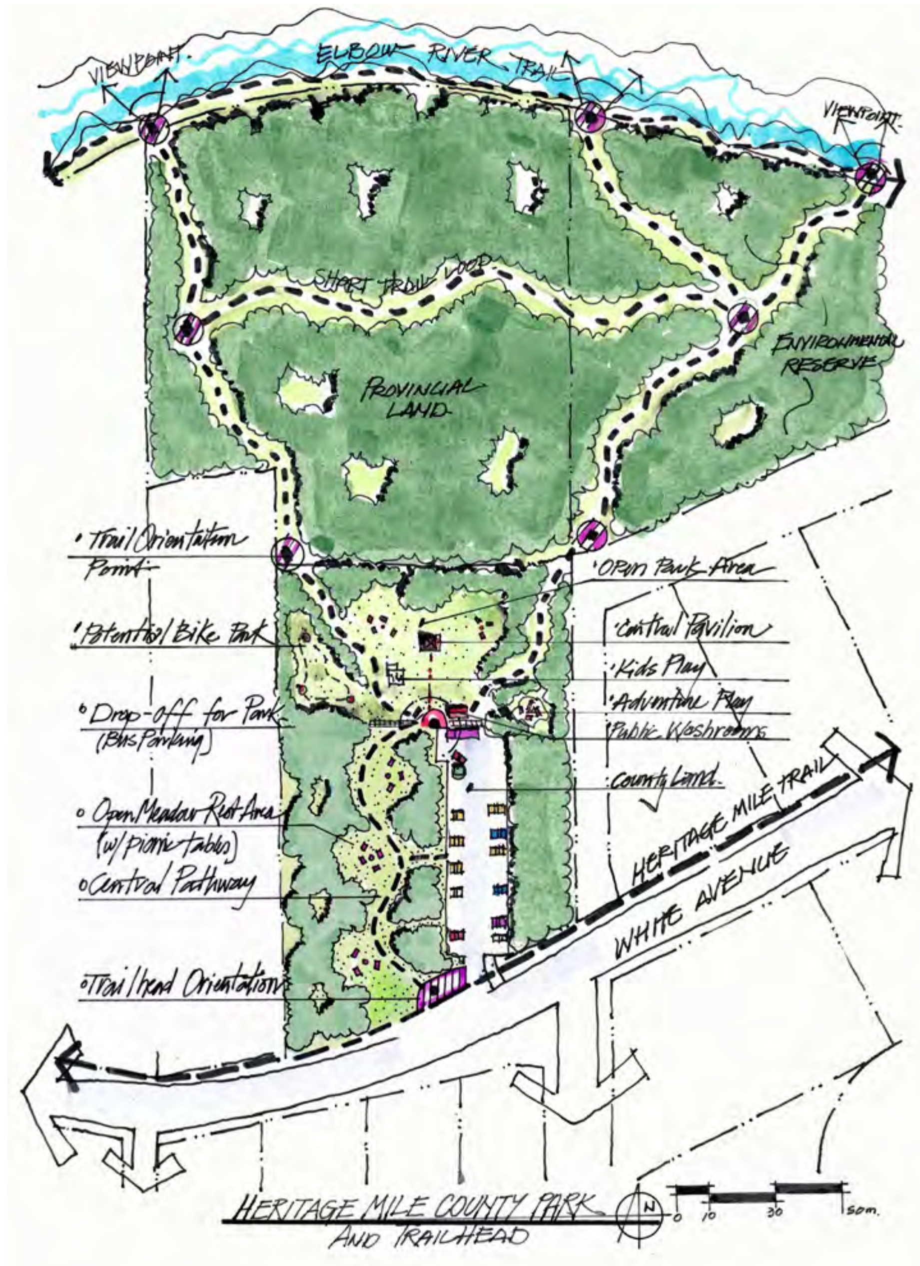

**BALSAM AVENUE IMPROVEMENTS**




**TOWN SQUARE / PLAZA**




**TRAILHEAD & PARK AREA - PERSPECTIVE**




**TRAILHEAD & PARK AREA - PLAN VIEW**