

Retail Demand Study

Town of Arnprior

September 17, 2026

Prepared for: Town of Arnprior

Prepared by: Tate Research



Lindsay Wilson
Marketing and Economic Development Officer
Town of Arnprior
105 Elgin Street West
Arnprior, ON K7S 0A8

September 17, 2026

Re: Retail Demand Study

Dear Ms. Wilson:

Tate Research Inc. is pleased to submit this Retail Demand Study for the Town of Arnprior. The Retail Demand Study examines the current retail commercial gaps as well as demand for future retail commercial uses.

The commercial offering is an integral part of any community's fabric. It can serve residents, generate employment opportunities and attract visitors by creating vibrant spaces that animate the Town. We envision this Retail Demand Study as setting the baseline of conditions for the Town to build upon.

We look forward to discussing the results with you.

Yours truly,

TATE RESEARCH INC.

A handwritten signature in black ink, appearing to read "S. Patel", with a stylized flourish at the end.

Sameer Patel
Vice President

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Executive Summary

Tate Economic Research Inc. (“Tate Research” or “TR”) is pleased to submit this Retail Demand Study for the Town of Arnprior. The objectives of the Retail Demand Study are:

- 1) Identify current and future commercial needs.
- 2) Identify future commercial land requirements, identify where growth should occur and provide supporting data to assist with assessing land use conversion requests.
- 3) Identify and collect market data through primary engagement and secondary data sources to assist with business retention and attraction.
- 4) Identify market trends to assist current and future businesses adapt to an evolving and challenging commercial market.
- 5) Deliver a Retail Demand Study outlining short, medium and long term commercial requirements and recommendations to achieve the sustained commercial growth.

Summary of Background Research and Findings

Arnprior Growth

Arnprior is forecast to experience significant growth over the 2026 – 2041 period.

- Based on the most recent projections, Arnprior is forecast to grow from approximately 11,500 residents in 2026 to 16,700 residents by 2041.¹
- This growth will generate additional demand for retail and service space. The nature of the type, timing, and location of future development will be shaped by regional competition, e-commerce, commuting patterns, site availability, and retailer requirements as examined in this report.

¹ Town of Arnprior Water & Wastewater Master Plan Update - November 15, 2024

Arnprior Retail Commercial Context

Arnprior represents an attractive destination for visitors from the surrounding area. The reasons for visiting are diverse:

- There is a significant component of visitors from Ottawa. These visitors are likely to be destination visits to the downtown and pass-by visits of convenience for the highway commercial. In addition, there is a small component of employment in Arnprior that originates from Ottawa.
- The visits from the surrounding rural areas are likely as a result of fulfilling daily and weekly convenience needs as well as purchases as a result of working in Arnprior. One quarter of all employees in Arnprior originate from McNab / Braeside.
- Given that the surrounding rural markets are not expected to develop commercial nodes, this inflow characteristic is assumed to continue.

The retail commercial nodes surrounding Arnprior, provide residents with access to a wider commercial market.

- The presence of nearby higher-order retail destinations, particularly in Kanata, means that some categories – particularly warehouse membership clubs, fashion outlets, and large format retail that require larger trade areas will continue to be better suited to Kanata.
- The attractiveness of Renfrew is based in part on a differentiated set of retailers, including a Walmart which does not exist in Arnprior.

The retail commercial hierarchy in Arnprior represents a spatially well balanced offering.

- The Town contains approximately 806,000 square feet of retail commercial space, including 762,400 square feet of occupied space. Retail and service space are evenly represented in terms of space, although retail is concentrated in fewer, larger premises while services occupy a greater number of smaller units.
- Arnprior's commercial activity is concentrated in two main areas: the Highway Commercial node and Downtown², each accounting for approximately 37% of the Town's total retail commercial inventory. The

² See Section 3 for node descriptions.

Highway Commercial node accommodates large-format, everyday needs retail, including the Town's two supermarkets, general merchandise stores, and national and international chains. Downtown is more service-oriented and contains a concentration of smaller local businesses.

- The overall vacancy rate is 5.4%; however, one building accounts for about 72% of vacant space. Excluding this building, the vacancy rate is approximately 1.6%, indicating limited available commercial space elsewhere in the Town.
- There are several options for new retail development in the Highway Commercial node and limited options for new development in the downtown.

Socio-Economic Characteristics

Arnprior has an older resident base with meaningful local purchasing power, creating potential demand for quality retail, services, leisure, and health-oriented offerings.

- The two largest PRIZM segments – Suburban Recliners (26% of households) and Scenic Retirement (23%) – together account for nearly half of all households and reflect a strong presence of older adults, retirees, and empty-nest households. These groups are generally active in community life, value-oriented in their purchasing decisions, and interested in leisure, recreation, local events, travel, and home-related activities.³
- It should be noted that the Suburban Recliners PRIZM segment is also the dominant segment in Renfrew (45.0% of households), Pembroke (28.3% of households) and Carleton Place (17.5% of households). The implication is that the same dominant household profiles are being served in the surrounding main population centres. This population base makes it harder for Arnprior to differentiate itself from its competitors.
- Household incomes indicate meaningful local purchasing power. At the same time, the relatively small share of lower-income households suggests that Arnprior has the capacity to support an expanded range of retail and service offerings, including quality convenience retail,

³ PRIZM features 67 segments that capture current demographics, lifestyles and values in Canada. Developed using dozens of authoritative data sources.

restaurants, health and wellness services, personal services and specialty goods.

- The age profile reinforces this opportunity as Arnprior has a notable concentration of residents aged 55 to 74.

Engagement Findings

Business-owner discussions and the resident survey indicate that Downtown has a regional draw, while local residents continue to make frequent retail trips outside Arnprior.

- Business owners reported that a big share of Downtown customers originate from outside Arnprior, particularly for independent boutiques, specialty retail, restaurants, and experience oriented businesses.
- Residents most commonly shop outside Arnprior in Kanata, Ottawa, and Renfrew, citing selection, brand availability, price, and convenience.
- Spending leakage is most evident in clothing and accessories, home décor furniture and electronics, entertainment, and grocery shopping.
- Residents identified a better mix of stores, additional events, more restaurants and cafes, and improved parking or access as measures that could encourage more frequent Downtown visits.
- There is strong support for a larger big-box store or power centre. There is strong support for a new grocery store.
- Independent and locally owned businesses remain important to Arnprior's Downtown identity.

Retail Trends

Arnprior's Downtown retail environment is positioned to build on its local character and experience oriented businesses, while the highway area continues to serve convenience and large-format retail needs.

- Consumers increasingly complete transactional purchases online or at large-format retailers and seek physical shopping experiences that provide personal service, unique products, food and beverage, events, and social interaction.

- Downtown Arnprior contains examples of experience-oriented and independent businesses, including boutiques, vintage and specialty retailers, restaurants, bakeries, and shared retail/café spaces.
- The Arnprior Market and retailer-led social media promotion help generate visits and reinforce the role of Downtown as a local and visitor oriented destination.
- Future tenant opportunities may include specialty food, restaurants, personal services, health and wellness, recreation, entertainment, and flexible formats such as pop-ups and shared spaces.

Gap Analysis Findings

The quantitative gap analysis indicates that Arnprior is generally well supplied in most retail and service categories, with identified gaps primarily reflecting expenditures that leave the Town.

- The analysis identifies gaps in the Clothing & Accessories, and Furniture, Home Furnishings & Electronics categories. While there is no gap in the entertainment & recreation categories, there is a gap in the sub category of health and wellness. This gap is partially based on the lack of health and wellness businesses (i.e. boutique fitness) and also based on retail trends.
- These gaps should be interpreted as indicators of expenditure leakage rather than a direct need for full-format stores, since regional destinations such as Kanata provide a broad range of comparison-shopping options.
- The gaps may support opportunities for smaller, specialized, differentiated, or independent businesses that complement the regional offering.
- Supermarkets, pharmacies, general merchandise, food services, personal services, health services, and most other categories are currently balanced under the analysis assumptions.
- It should be noted, if there is no quantitative gap, this also does not mean that those store categories are not warranted. For example, while there appears to be no gap in the supermarket category, there may be an opportunity for a new banner to enter the market that currently does not exist.

Future Commercial Demand

Arnprior's projected population growth will generate demand for additional retail and service space to 2041, and the Town has sufficient designated vacant and underutilized commercial land to accommodate this growth.

- By 2041, Arnprior could support approximately 174,300 square feet of additional retail and service commercial space.
- There is potential for approximately 8,400 square feet of additional commercial space through active development applications, although only part of this supply is likely to proceed in the near term.
- Arnprior has approximately 23.1 acres of vacant commercially designated land, compared with a theoretical requirement of 15.2 acres to accommodate projected demand to 2041. In addition, there is approximately 95 acres of underutilized lands that could accommodate future retail commercial development.

Summary of Current Conditions

This section summarizes the current market conditions in Arnprior.

Overall Health

TR has completed retail studies for rural and urban municipalities across Canada, with a wide range of populations and local contexts. Based on this experience, Arnprior can be characterized as a healthy retail commercial community.

- While many municipalities face high commercial vacancy rates, Arnprior's low vacancy rate, though presenting some challenges, is a strong indicator of a healthy retail commercial hierarchy.
- There are sufficient development opportunities to accommodate future commercial demands in terms of vacant land and intensification opportunities.
- Although broader economic and labour market conditions remain challenging for businesses, Arnprior appears less affected by issues facing many downtowns across Ontario and Canada, including large unhoused populations and petty crime. Consequently, local operators are less exposed to the direct impacts of these conditions.

- The health of the retail commercial offering is underlined by the survey results of business owners. Among surveyed business owners, 67% reported sales growth over the past three years.

Function

One of Arnprior's key commercial strengths is the presence of two established and complementary retail nodes: Downtown Arnprior and the Highway Commercial node, which combined account for 76% of the occupied retail commercial space and 79% of the businesses in Arnprior. Located less than two kilometres apart, these nodes provide residents and visitors with distinct yet interconnected experiences.

- As is common in many successful smaller municipalities, the dual-node retail commercial structure in Arnprior allows commercial functions to be distributed according to their operational needs and customer bases.
- The Highway Commercial node accommodates larger-format retailers, convenience-oriented commercial uses, and businesses that require greater visibility, parking, and accessibility. In contrast, Downtown Arnprior serves as the community's historic and cultural heart, offering a concentration of locally owned businesses, personal services, restaurants, civic uses, and pedestrian-oriented experiences.
- While there is some overlap in the goods and services provided within each node, they largely fulfill different market functions and contribute to a broader range of commercial opportunities than either node could provide independently. Together, they offer residents access to a diverse mix of retail, service, employment, and community destinations, contributing to Arnprior's increasing role as a complete community.
- The complementary relationship between Downtown Arnprior and the Highway Commercial node is an important component of a complete community, ensuring that residents can access a wide range of goods, services, employment opportunities, and community destinations within a short distance of where they live, while supporting both local businesses and larger-format commercial uses.

Form

Downtown Arnprior, is a strongly defined, compact commercial centre shaped by the intersection of Elgin St. W. and John St. N. The Downtown possesses many of the characteristics associated with successful and vibrant downtown main streets.

- A continuous, double-sided retail environment extends for approximately 500 metres, creating a concentrated commercial district that is easily navigated on foot.
- Frequent storefront entrances and narrow door spacing contribute to a highly active pedestrian experience, maintaining visual interest and encouraging walking along the corridor.
- A relatively compact street width fosters strong visual connections between both sides of the street, increasing pedestrian movement and supporting businesses throughout the downtown.
- A diverse mix of building facades, storefront designs, and architectural styles creates a distinctive sense of place and enhances the overall attractiveness of the downtown environment.

Collectively, these attributes contribute to a vibrant, walkable, and human-scaled commercial area that supports local businesses, encourages visitor activity, and reinforces Downtown Arnprior's role as the community's primary civic and cultural destination.

The Highway Commercial and Madawaska Blvd. nodes are characterized by more conventional commercial formats, including strip plazas and single-storey retail buildings. While these areas offer a different experience from Downtown Arnprior, they provide important commercial functions that complement the downtown core.

- These formats are valued for their convenience, visibility, and ease of access. Ample on-site parking, direct vehicular access, and the ability to accommodate larger-format retailers make these nodes well-suited to destination shopping and convenience-oriented commercial uses.
- Their design and accessibility help meet day-to-day shopping needs while accommodating businesses that may not be well suited to the downtown's more compact, pedestrian-oriented environment.

Together, the Downtown, the Highway Commercial and Madawaska Blvd. nodes provide a balanced commercial offering, allowing Arnprior to support both a vibrant main street experience and modern retail formats that serve the needs of residents, visitors, and businesses.

Summary of Current Challenges

While the current conditions point to a healthy commercial hierarchy, there are areas for improvement as informed from our background work including focus groups and on-line survey results.

Outflow of Expenditures

Arnprior experiences measurable retail expenditure outflows to both Kanata and Renfrew.

- Expenditures directed toward Kanata are generally expected given its larger population base and broader selection of retailers, services, and commercial destinations. More notable, however, is the extent of expenditure outflow to Renfrew.
- From a market perspective, Renfrew is located "outboard" of Arnprior, meaning it is situated in the opposite direction of the regional pull exerted by the Ottawa metropolitan area. As a result, it would not typically be expected to capture a significant share of Arnprior residents' spending.
- Survey findings and mobility data indicate that the absence of certain retail offerings within Arnprior, particularly in the supermarket and discount department store sectors, may be contributing to expenditure leakage that extends beyond the initial shopping trip.

Cross-Shopping Between Commercial Nodes

Mobility data indicates relatively limited cross-shopping activity between Downtown Arnprior and the Highway Commercial nodes. As the two major nodes, this suggests that these two areas largely function as distinct commercial destinations serving different trip purposes.

- Among visitors to the Highway Commercial node, only 18% also visited Downtown Arnprior during the same trip pattern, meaning that 82% did not visit the downtown. Conversely, 31% of visitors to Downtown Arnprior also visited the Highway Commercial node.

- These findings suggest that the two commercial nodes are not strongly linked from a consumer behaviour perspective. Rather than functioning as a single integrated shopping district, each node appears to attract visitors for different purposes.
- The Highway Commercial node is primarily associated with convenience-oriented and destination retail trips, while the downtown serves a greater role as a destination for local shopping, services, restaurants, and community activities. Therefore, the spending generated within each node is not fully benefiting the broader Arnprior commercial area.

Downtown Organization

The absence of a downtown-specific organization has been identified as an ongoing challenge by downtown businesses and stakeholders. While the reasons for the former BIA being disbanded are not analyzed or investigated in this report, its absence has created gaps in the coordination and advocacy of downtown-focused initiatives.

- In particular, concerns were raised regarding responsibility for beautification, event programming, business promotion, and the overall stewardship of the downtown. These functions are often coordinated through a BIA or similar organization that provides a dedicated forum for collaboration among businesses and acts as a champion for the downtown.
- The Town has undertaken considerable efforts to support and market the downtown and should be recognized for its commitment in this regard. However, stakeholders noted that the Economic Development Department must balance downtown initiatives with a broad range of community-wide economic development responsibilities. As a result, there is a perception among some businesses that the downtown does not receive the level of dedicated attention, programming, and advocacy that a focused downtown organization could provide.
- While the downtown continues to benefit from municipal support, the absence of a dedicated governance or coordination structure may limit opportunities to undertake collaborative marketing initiatives, organize events, pursue beautification projects, and advocate for the unique needs of downtown businesses. As the downtown evolves, consideration could be given to alternative organizational models that provide a stronger

downtown-specific focus while reflecting local circumstances and stakeholder interest.

Summary of Implementation Action Plan

A detailed implementation action plan is provided in Chapter 9 of this report. The overarching objective of this implementation plan is to strengthen Arnprior's position as both a regional service centre and a destination community. The recommended actions focus on retaining and supporting existing businesses, improving expenditure retention, enhancing visitor attraction, protecting commercial growth opportunities, and ensuring that future population growth is accompanied by a corresponding expansion of retail, service, employment, and tourism activity. By pursuing these actions, Arnprior can continue building upon its existing strengths while positioning itself for sustainable long-term economic growth.

Short-Term Actions (0-2 Years)

1. Strengthen Economic Development Capacity
 - Increase dedicated economic development resources to support business growth, investment attraction, tourism development, stakeholder engagement, and implementation of key economic initiatives.
2. Business Retention and Expansion Program
 - Establish a formal business outreach program to support existing businesses, identify emerging challenges, facilitate investment, and connect employers to available funding opportunities.
3. Business Collaboration and Networking Program
 - Create regular networking and engagement opportunities that strengthen relationships among local businesses, institutions, tourism operators, and major employers while fostering collaboration and local supply chain development.
4. Downtown Marketing Program
 - Implement a coordinated marketing and branding initiative that promotes Downtown Arnprior as a unique shopping, dining, cultural, and visitor destination.

5. Improve Cross-Shopping Between Commercial Nodes

- Encourage stronger connections between Downtown Arnprior and the Highway Commercial area through coordinated promotions, events, and wayfinding that increase local spending retention.

6. Arnprior Market Enhancement Program

- Continue enhancing the Arnprior Market through expanded programming, marketing, and vendor recruitment to increase visitation and strengthen downtown business activity.

7. Tourism Development and Visitor Retention Strategy

- Develop a tourism strategy focused on increasing visitation, visitor spending, and length of stay while leveraging Arnprior's recreational, cultural, and heritage assets.

Medium-Term Actions (3-5 Years)

8. Economic Development Governance Model

- Evaluate governance options and undertake a capacity-building process to establish a sustainable structure that supports business development, tourism promotion, downtown revitalization, and stakeholder collaboration.

9. Review and Modernize the Community Improvement Plan (CIP)

- Update the CIP to improve accessibility, increase participation, and better align incentives with current economic development, downtown revitalization, and tourism objectives.

10. Targeted Tenant Recruitment Strategy

- Implement proactive recruitment efforts focused on priority retail and service sectors that address identified market gaps and strengthen local expenditure retention.

11. Workforce Attraction and Retention Strategy

- Partner with employers and regional stakeholders to attract and retain workers through workforce marketing, training, housing, and newcomer support initiatives.

12. Event and Programming Expansion

- Expand community events and programming to attract visitors, support local businesses, and enhance community vibrancy throughout the year.

Long-Term Actions (5+ Years)

13. Highway Commercial Build-Out

- Support the continued development of the Highway Commercial area as Arnprior's primary location for future large-format retail and commercial growth.

14. Commercial Land Strategy

- Protect sufficient commercial land supplies to accommodate long-term retail and service growth while supporting uses that reduce expenditure leakage to surrounding communities.

15. Strategic Commercial and Employment Growth

- Pursue targeted commercial, employment, tourism, and institutional investments that strengthen Arnprior's role as a regional service centre and increase local employment opportunities.

16. Downtown Intensification Strategy

- Encourage residential intensification and mixed-use development downtown to support local businesses, increase foot traffic, and reinforce Downtown Arnprior as the community's commercial and civic heart.
-

1 Introduction

Tate Economic Research Inc. (“Tate Research” or “TR”) is pleased to submit this Retail Demand Study for the Town of Arnprior.

Figure 1-1: Town of Arnprior



Source: Tate Research base map Esri ArcGIS.

1.1 Mandate

The Town of Arnprior prepared a detailed RFP for a Retail Demand Study. TR submitted a proposal of services, with our understanding of the requirements as follows:

- 1) Identify current and future commercial needs.
- 2) Identify future commercial land requirements, identify where growth should occur and provide supporting data to assist with assessing land use conversion requests.
- 3) Identify and collect market data through primary engagement and secondary data sources to assist with business retention and attraction.

- 4) Identify market trends to assist current and future businesses adapt to an evolving and challenging commercial market.
- 5) Deliver a Retail Demand Study outlining short, medium and long term commercial requirements and recommendations to achieve sustained commercial growth.

1.2 Background – Arnprior Growth Context

The Town of Arnprior is located in Renfrew County, at the confluence of the Madawaska and Ottawa Rivers, approximately 65 kilometres west of Ottawa along Highway 417.

Figure 1-2: Arnprior Population Growth

	2021	2026	2031	2036	2041
Town of Arnprior	9,900	11,500	13,600	15,200	16,700
Period Change		1,600	2,100	1,600	1,500
Average Annual Growth		320	420	320	300
Average Annual Growth		3.2%	3.7%	2.4%	2.0%

Source: Town of Arnprior Water & Wastewater Master Plan Update - November 15, 2024
The 2026, 2031, 2036, and 2041 population estimates were calculated by assuming a straight-line progression between the corresponding known population figures for 2022, 2027, 2031, and 2042 in the W&WWMP Study. This analysis uses the medium growth scenario.

Arnprior has experienced and is forecast to experience steady population growth over the long term. Based on the Town of Arnprior Water & Wastewater Master Plan⁴, Arnprior’s population is expected to increase from approximately 11,500 persons in 2026 to 16,700 persons by 2041.

This projected growth will reinforce Arnprior’s role as a key population and service centre within Renfrew County and the broader Ottawa Valley. As the community expands, there will be a corresponding requirement for additional retail and service commercial space to meet the needs of a larger and more diverse population, to support local employment, and to strengthen Arnprior’s overall commercial structure.

⁴ Town of Arnprior Water & Wastewater Master Plan Update - November 15, 2024 – Table 5-22. The horizon year for this report was 2042.

1.3 Methodology and Work Scope

The Retail Demand Study was completed through a phased work scope that combined primary research, secondary data analysis, field inventory, and stakeholder engagement.

Inventory of Existing and Proposed Retail Commercial Space

A key component of the study was the field inventory of retail commercial space in Arnprior and surrounding competitive area, which was mapped and analysed to understand the distribution, function, and health of the local retail commercial market.

TR conducted an on-ground inventory of existing commercial sectors and retail supply. TR conducted the inventory with in-house staff and physically measured all of the space utilizing a pace methodology where we measure the length and width of each individual building. This information is verified by internet research, as appropriate.

The detailed inventory of the nodes in Arnprior includes the location, size, North American Industrial Classification System (“NAICS”)⁵ code, and function of all retail, service and vacant space.

TR summarized the proposed commercial supply in terms of current development applications and vacant designated commercial lands based on data provided by the Town.

Socio-Economic Characteristics

TR analyzed the relevant socio-economic characteristics of Arnprior residents and the surrounding area based on data from Environics Analytics. The socio-economic characteristics provide an insight into the retail commercial market positioning of Arnprior and also the potential differentiation with surrounding competitive nodes.

⁵ The North American Industry Classification System (NAICS) is an industry classification system developed by the statistical agencies of Canada, Mexico and the United States. Created against the background of the North American Free Trade Agreement, it is designed to provide common definitions of the industrial structure of the three countries and a common statistical framework to facilitate the analysis of the three economies.

Retail Trends and Engagement

Primary engagement, including interviews and an online survey, were used to capture local perspectives from businesses, residents, and other stakeholders. A total of 1,598 resident surveys were completed. Based on Arnprior's 2026 population estimate of approximately 11,500 residents, the survey results have a confidence level exceeding 95% with a margin of error below $\pm 3\%$.

Gap Analysis and Future Demand Analysis

The Gap Analysis and Future Demand Analysis are based on TR's proprietary demand analysis model. This demand analysis model uses a complex set of inputs that accounts for population growth, expenditure growth, the incomes of Arnprior residents, e-commerce impacts, forecast sales per square foot performance levels of existing and future commercial space, as well as capture and inflow rates.

One of the key components of the demand analysis model is understanding where customers come from. TR utilizes mobility location services data from a company known as Azira, utilizing their web-based Vista Location Intelligence Platform. The Vista Location Intelligence Platform connects with third-party apps within a consumer's cellular phone and anonymously records where that phone was seen. TR utilizes the Vista Platform to determine where customers who visit certain retail stores, retail centres or retail nodes are coming from, in order to adjust the gap analysis.

Opportunities, Strategy and Recommendations

The final phase of the study synthesizes the findings into a set of practical recommendations focused on current and future retail and service needs, commercial land requirements, business attraction opportunities, and strategies to support long-term commercial growth in Arnprior.

1.4 Report Structure

This report is structured as follows:

Chapter 1: Introduction

Chapter 2: Regional Retail Context

Chapter 3: Retail Commercial Context

Chapter 4: Socio-Economic Characteristics

Chapter 5: Quantitative Retail Commercial Gap Analysis

Chapter 6: Future Retail Commercial Demand Analysis

Chapter 7: Retail Commercial Trends

Chapter 8: Engagement

Chapter 9: Opportunities, Strategy and Recommendations

1.5 Basic Assumptions

The report and its recommendations should be reviewed in light of certain basic assumptions, which are outlined below:

- This report relies on both primary and secondary data sources. While we take reasonable steps to verify the secondary data used, we cannot independently confirm the methodology behind it and therefore cannot guarantee its accuracy. TR reserves the right to revise the recommendations in this report if new or updated secondary data becomes available.
- The retail market is in a constant state of change and TR has provided the recommendations in this report considering the current retail market conditions as well as an informed and educated opinion on the future of the market. Should the retail market diverge significantly from what we currently understand, the findings and recommendations of this report should be revisited.
- This report has been prepared to assist the Town of Arnprior with strengthening their retail commercial hierarchy and assist with business retention and attraction efforts. This report and its conclusions are not appropriate for use by third parties to support or prevent future retail commercial development applications. Those applications should be considered on their own merit based on market research and conditions specific to that development application.

This report is intended for the uses outlined in the mandate. No parts of this report may be replicated or used for purposes other than that stated in the mandate without the written consent of Tate Research.

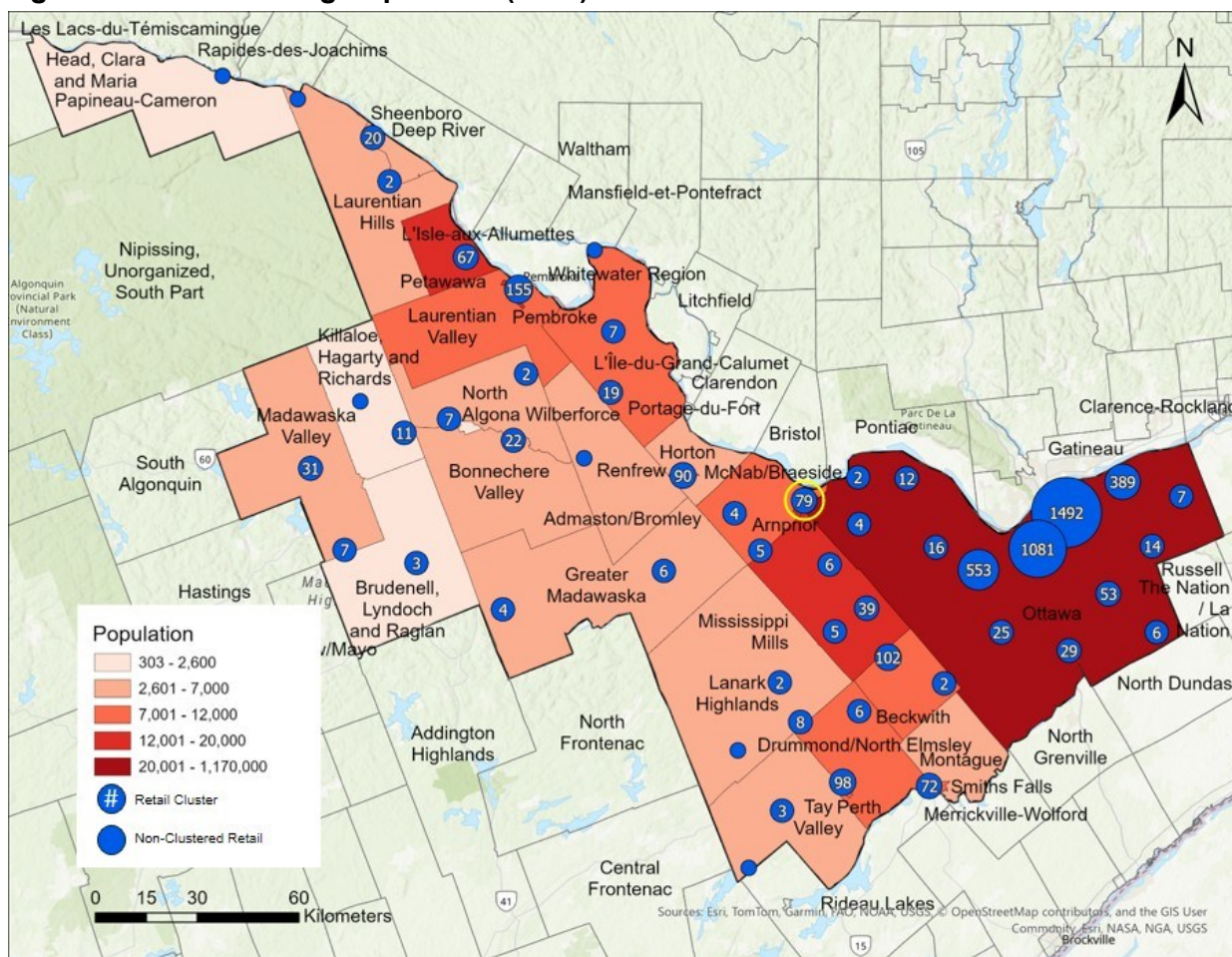
2 Regional Retail Context

Arnprior exists within a regional geographic hierarchy of commercial spaces. This section of the report examines the surrounding context within which Arnprior retail operates.

2.1 Arnprior Surrounding Context

Figure 2-1 illustrates the 2026 population by Census Subdivision in the surrounding area. It also includes an estimate of retail businesses in the surrounding municipalities.

Figure 2-1: Surrounding Population (2026) and Retail Context



Source: Tate Research. The estimate of retail businesses is based on North American Industrial Classification System (NAICS) codes 44 and 45 which are defined as Retail Trade. These numbers exclude various services that have been incorporated in the TR inventory. These are not meant to be a comprehensive listing of retail stores. The purpose is to show the relative retail levels of the surrounding municipalities. 2026 population from EnviroNics Analytics.

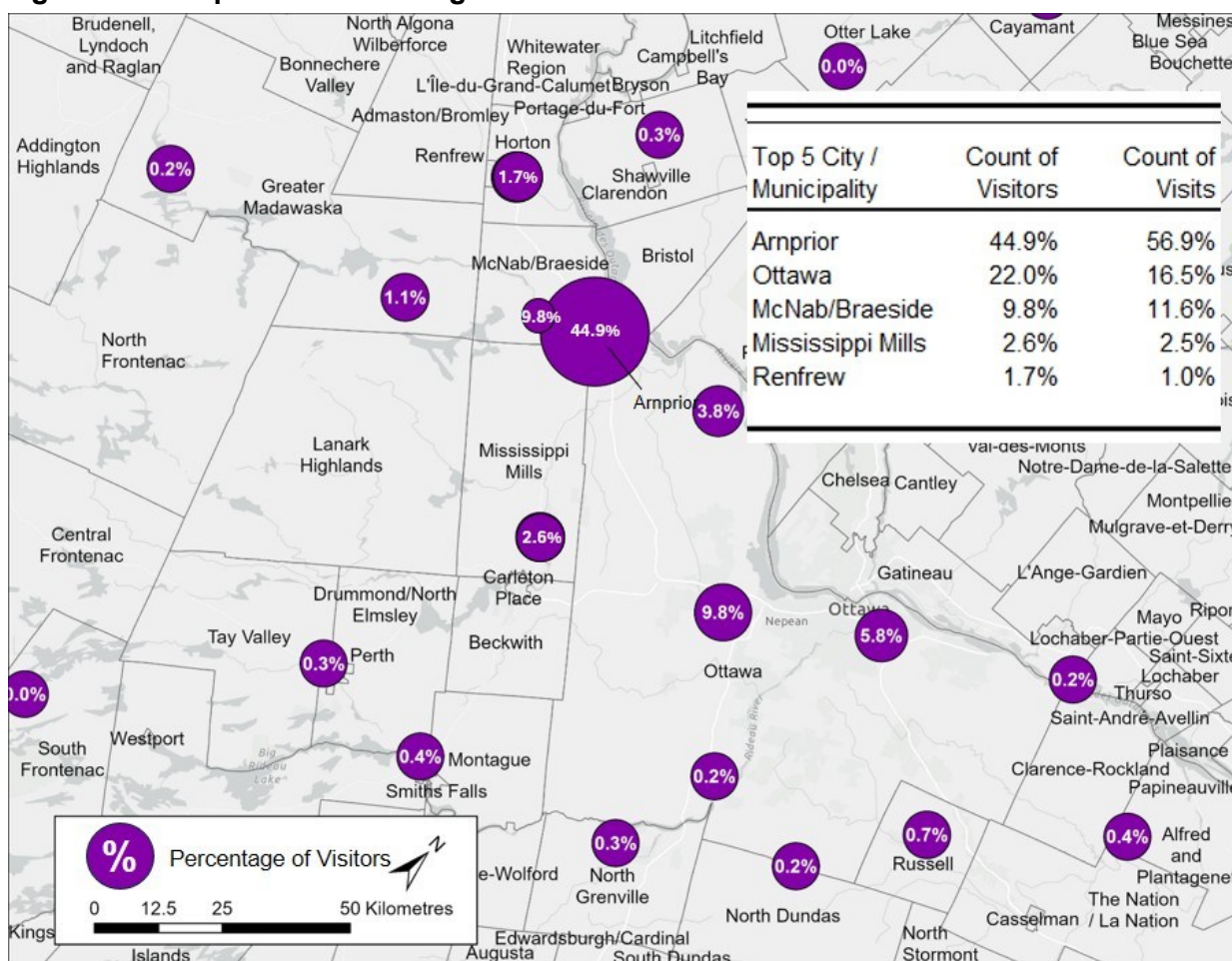
The following observations are made with respect to Figure 2-1:

- Both Arnprior and Renfrew have the largest concentration of retail businesses along Hwy. 417 / 17 between Ottawa and Pembroke.
- The implication is that smaller rural communities rely on Arnprior and Renfrew for their convenience goods and services while these smaller communities and Arnprior look to the larger centres, in this case, Ottawa, for more destination goods and services.

2.2 Arnprior “Inflow” Regional Retail Context

Inflow in this market context refers to the expenditures spent at retail commercial business in Arnprior by persons who do not live in Arnprior. To assess Arnprior’s inflow context and its role as a regional hub, TR examined the customer draw of the Downtown and Highway Commercial (Daniel Street South / White Lake Road) commercial nodes using mobility data. Figure 2-2 illustrates the retail commercial draw from the surrounding area.

Figure 2-2: Arnprior “Inflow” Regional Retail Context



Source: Tate Research based on Downtown and Highway Commercial nodes customer draw from August 1st 2025 to August 1st 2026.

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

- More than half of the visitors to these combined nodes originate from beyond Arnprior.
- Ottawa is the largest external source at 22.0% of visitors, but only 16.5% of visits, pointing to occasional or destination-based trips rather than routine shopping.
- McNab/Braeside residents visit at an above-average frequency here (9.8% of visitors but 11.6% of visits). Arnprior functions as their regular, rather than occasional, shopping destination.

Arnprior represents an attractive destination for visitors from the surrounding area.

2.3 Arnprior “Outflow” Regional Retail Context

Outflow / leakage refers to Arnprior residents’ expenditures that are spent at retail commercial businesses outside of Arnprior. Arnprior is situated within a broader retail macro context that includes several significant commercial concentrations in the Ottawa Valley and western Ottawa.

To assess Arnprior’s inflow context and its role as a regional hub, TR examined the customer draw of Kanata, Renfrew and Carleton Place commercial nodes using mobility data. Figure 2-3 illustrates the retail commercial draw from the surrounding area.

Figure 2-3: Arnprior “Outflow” Regional Retail Context

City/Municipality	Count of Visitors	Rank	Count of Visits	Rank
Walmart Renfrew	7.8%	3	5.9%	3
Downtown Renfrew	3.1%	4	2.0%	6
Kanata Costco	1.5%	5	1.2%	5
Kanata Centrum	1.3%	3	1.0%	4
Carleton Place	1.0%	14	0.7%	14

Source: Tate Research based on customer draw from August 1st 2025 to August 1st 2026.

The following observations are made with respect to Figure 2-3:

- The data in the table should be read as: “of all the visitors to the Walmart in Renfrew over the August 2025 to August 2026 period, 7.8% came from Arnprior”. If we assume that a Walmart supercentre such as the Renfrew one would draw approximately 70,000 visitors a year, this would equate to approximately 5,500 visitors from Arnprior.⁶ Based on these assumptions, almost half of Arnprior’s population would have visited the Walmart in the year from August 2025 to August 2026.
- The “rank” in the table represents where Arnprior residents rank in terms of the geographic distribution of that node’s visitors.
- Arnprior residents’ frequent stores outside of Arnprior to fulfill their shopping needs specifically in Renfrew and Kanata and to a lesser extent in Carleton Place.

Taken together, these surrounding nodes provide Arnprior residents with access to a wider commercial market.

2.4 Retail Commercial Demand Context

In addition to the mobility data, commuter flow patterns provide an indication of the reach of Arnprior’s retail commercial market. As illustrated in Figure 2-4, Arnprior attracts a daytime working population from surrounding municipalities, while also sending a share of its resident workforce to jobs outside the Town.

Figure 2-4: Labour Force Commuter Flow – Arnprior (2021)

	Works in Araprior	Works Outside Araprior	Total
Live in Arnprior	1,240	1,220	2,460
	Lives in Araprior	Lives Outside Araprior	Total
Work in Arnprior	1,240	1,850	3,090

Source: Statistics Canada. Table 98-10-0459-01 Commuting flow labour force 15 years and over having a usual place of work 2021 Census of Canada.

⁶ Visitors that would conduct multiple visits per year.

The following observations are made with respect to the 2021 Census of Canada commuter flow data:

- Of the 2,460 labour force participants with a usual place of work who live in Arnprior, approximately half commute to jobs outside of Arnprior. The most common places of employment were Ottawa and Renfrew. Economic development studies refer to the number of people working within a municipality as a percentage of the total employed labour force as the “Employment Self-Containment Rate”. A rate of 50% as experienced in Arnprior, represented a moderate dependence on external employment. Typically, a percentage of less than 30% represents a bedroom community.
- Conversely of the 3,090 labour force participants with a usual place of work in Arnprior, approximately 60% commuted into Arnprior from other municipalities. The largest inflows originate from McNab / Braeside, Ottawa, Renfrew, and Horton.
- This pattern is significant because residents who commute outside Arnprior are likely to complete a portion of their shopping and service needs outside of Arnprior, particularly where there are greater retail choice and convenience.

For retail commercial demand purposes, these commuting patterns suggest both inflow and outflow effects. Daytime workers from surrounding municipalities help support local spending in food services, convenience retail, and personal services, while outbound commuting to Ottawa and Renfrew contributes to demand leakage.

2.5 Arnprior Regional Retail Context Summary

In addition to serving the local Arnprior population, the retail hierarchy in Arnprior is influenced by factors beyond the municipal boundaries. Demand from the surrounding rural municipalities plays an important role in supporting the existing retail. Conversely, the larger population concentration in Ottawa supports a broader range of retail uses and formats which serve Arnprior residents.

Arnprior represents an attractive destination for visitors from the surrounding area. The reasons for visiting are diverse:

- The Ottawa visitors are likely to be destination visits to the Downtown and pass-by visits of convenience for the Highway Commercial node. In

addition, there is a component of employment in Arnprior that originates from Ottawa.

- The visits from the surrounding rural areas are likely as a result of fulfilling daily and weekly convenience needs as well as purchases as a result of working in Arnprior. One quarter of all employees in Arnprior originate from McNab / Braeside.
- Given that the Ottawa / Kanata retail market is mature and the surrounding rural markets are not expected to develop commercial nodes, this inflow characteristic is assumed to continue, however, there is opportunity to reduce this outflow, as discussed later in this report.

The retail commercial nodes surrounding Arnprior, provide residents with access to a wider commercial market.

- The presence of nearby higher-order retail destinations, particularly in Kanata, means that some categories – particularly warehouse membership clubs, fashion outlets, and large format retail that require larger trade areas will continue to be better suited to Kanata.
- The attractiveness of Renfrew is based in part on a differentiated set of retailers, including supermarket banners that do not exist in Arnprior.

3 Retail Commercial Context

This section examines the current Arnprior retail commercial hierarchy. The existing retail commercial hierarchy is the foundation of the Retail Demand Study.

3.1 Retail Commercial Definitions

TR conducted a complete inventory of the retail commercial space in Arnprior in July 2026. For reference purposes, the term “retail commercial” refers to all retail, service and vacant space. The following retail and service categories fall under the term retail commercial:

Food & Beverage Retail (FBR):

- 1) Supermarkets & Grocery Stores
- 2) Convenience & Specialty Food Stores and
- 3) Beer, Wine & Liquor Stores.

Non-Food & Beverage Retail (NFBR):

- 1) Clothing, Shoes & Accessories
- 2) Furniture, Home Furnishings & Electronics
- 3) General Merchandise
- 4) Miscellaneous Retail
- 5) Building & Outdoor Home Supply
- 6) Pharmacies & Personal Care
- 7) Department Stores and
- 8) Automotive

Services:

- 1) Food Services & Drinking Places
- 2) Financial, Insurance, Legal & Real Estate
- 3) Health Care & Social Assistance
- 4) Entertainment & Recreation
- 5) Personal Care & Laundry and
- 6) Other

The function of a commercial area can be defined in various ways. From a retail market perspective, function is typically defined through the amount and type of tenants and their position within the retail hierarchy.

Typically, the retail function of an area may evolve over time as the surrounding residential areas gentrify or new retail space is developed. The evolution of main streets is continuous. Recent evolution trends can generally be characterized as a shift to entertainment, services and convenience retail.

With respect to retail function, retail developments, main streets or nodes typically contain two types of tenants:

- 1) Specialty / Destination retailers; and,
- 2) Convenience / Local retailers.

Each type of tenant and the goods and services it provides can have a different function within the market. This function is described below.

Specialty / Destination Retailers and Service Providers

- Destination retailers provide “higher order” goods and services. These goods and services are purchased infrequently. These retailers draw shoppers from a larger trade area or, conversely, shoppers are willing to travel longer distances to shop at these stores. Specialty / destination retailers are in regional centres, which are smaller in number and spaced further apart.
- Generally, destination retailers sell comparison goods, which are products that consumers often compare on the basis of price and other attributes before deciding which purchase to make (i.e. appliances, cars and clothing). Typically, retailers of comparison goods tend to locate near one another such as shopping malls for clothing or automotive parks for cars; and,
- Destination services such as some doctors, travel agents, etc. are similar in function to destination retailers. Restaurants, depending on the type, can also act as destination services and attract customers from a wide area.

Convenience / Local Retailers and Service Providers

- Convenience retailers provide “lower order” goods and services. These goods and services are purchased frequently and are more common in nature. Generally, from a retail supply perspective, convenience / local retailers are in neighbourhood and community shopping centres, are more common in number and are near residential population for ease of access; and,
- Supermarkets and pharmacies are typically considered convenience retailers. There are several services, such as fast food or sit-down restaurants, hairdressers and banks, which are also considered

convenience services. These retailers and services typically have localized trade areas and serve the local population on a frequent basis.

3.2 Town of Arnprior Retail Commercial Space

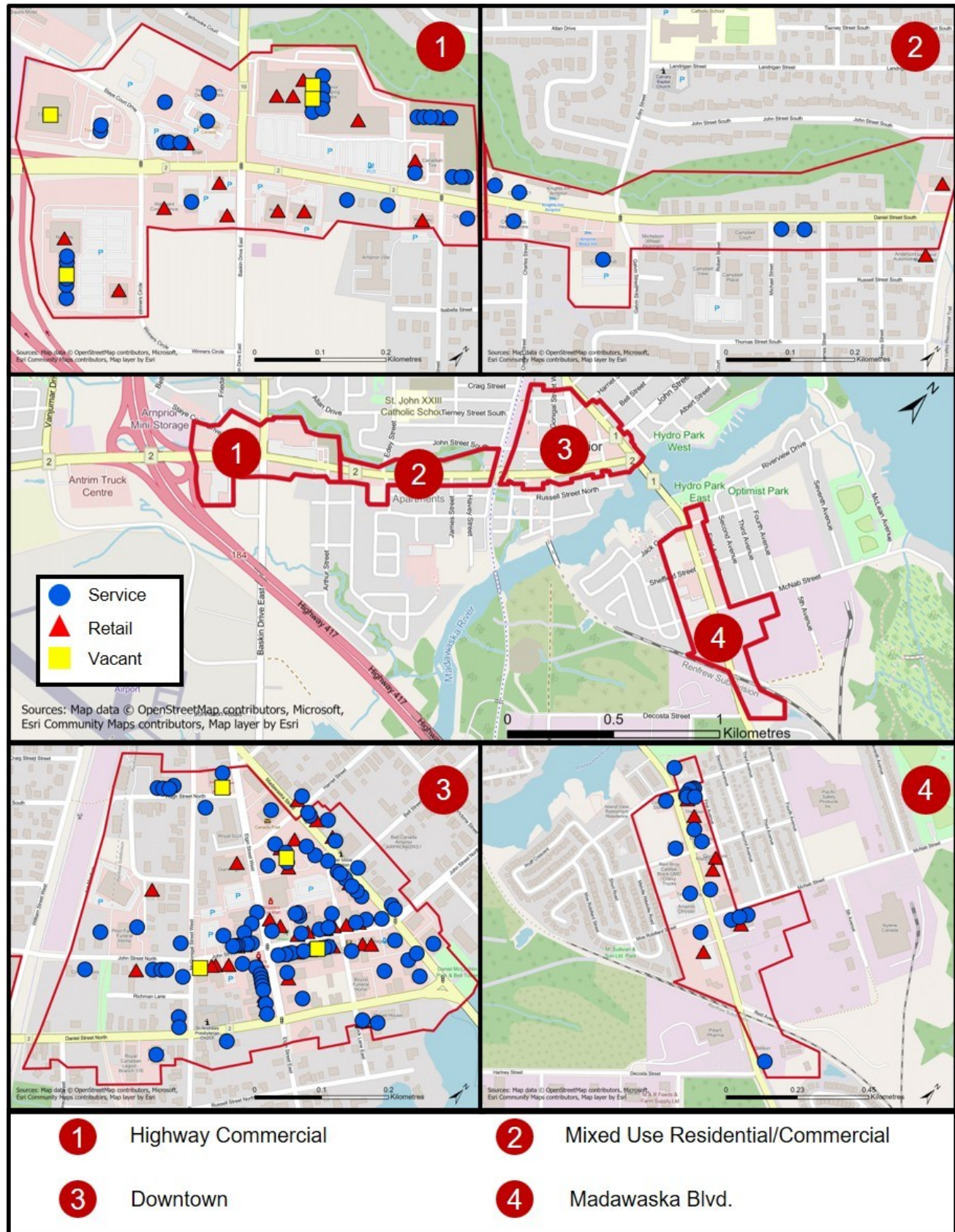
Figures 3-1 and 3-2 provide a summary of the inventory of retail commercial space and the location of the space. The inventory was categorized into five nodes using the Town's Official Plan Land Use Designations as a reference.

Figure 3-1: Town of Arnprior Inventory of Retail Commercial Space

	Nodes	Highway Commercial (1)	Mixed Use Residential / Commercial (2)	Downtown (3)	Madawaska Blvd. (4)	Other (5)	Total	Percent Distribution
Food & Beverage Retail (FBR)								
Supermarkets & Grocery Stores		57,800	0	0	0	0	57,800	7.2%
Convenience & Specialty Food Stores		6,500	0	7,500	6,000	0	20,000	2.5%
Beer, Wine & Liquor		7,900	0	0	4,300	0	12,200	1.5%
Food & Beverage Retail (FBR)		72,200	0	7,500	10,300	0	90,000	11.2%
Non-Food & Beverage Retail (NFBR)								
General Merchandise		92,400	0	23,000	0	0	115,400	14.3%
Clothing, Shoes & Accessories		8,000	0	6,400	0	0	14,400	1.8%
Furniture, Home Furnishings & Electronics		0	0	8,600	0	0	8,600	1.1%
Pharmacies & Personal Care		14,000	0	26,300	0	0	40,300	5.0%
Building & Outdoor Home Supply		9,400	0	0	24,000	4,200	37,600	4.7%
Miscellaneous Retailers		7,700	6,100	34,700	2,500	11,100	62,100	7.7%
Automotive		2,300	2,100	0	7,600	0	12,000	1.5%
Subtotal Non-Food & Beverage Retail (NFBR)		133,800	8,200	99,000	34,100	15,300	290,400	36.0%
Service Space								
Food Services & Drinking Places		35,300	0	23,100	22,400	10,800	91,600	11.4%
Personal Care & Laundry Services		6,800	0	47,100	2,200	0	56,100	7.0%
Financial, Insurance, Legal & Real Estate Services		4,400	3,200	31,800	5,100	0	44,500	5.5%
Health Care & Social Assistance Services		10,700	8,700	33,000	1,100	24,100	77,600	9.6%
Entertainment & Recreation Services		4,200	15,200	11,100	0	16,700	47,200	5.9%
Other Services		2,300	0	43,100	5,000	14,600	65,000	8.1%
Subtotal Service Space		63,700	27,100	189,200	35,800	66,200	382,000	47.4%
Total Occupied Retail & Service Space		269,700	35,300	295,700	80,200	81,500	762,400	94.6%
Vacant		34,700	0	8,900	0	0	43,600	5.4%
Vacancy Rate (%)		11.4%	0.0%	2.9%	0.0%	0.0%	5.4%	
Total Retail & Service Space		304,400	35,300	304,600	80,200	81,500	806,000	100.0%
Percent Distribution		37.8%	4.4%	37.8%	10.0%	10.1%	100.0%	

Source: Tate Research, Based on inventory and site inspections completed by TR in July 2026. Rounded to the nearest 100 square feet.

Figure 3-2: Town of Arnprior's Commercial Nodes



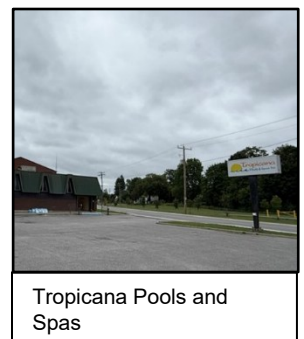
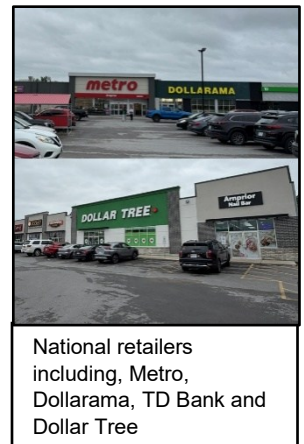
Source: Tate Research. Node #5 "other" is dispersed retail commercial in various locations.

The following observations are made with respect to the inventory of retail commercial space in Arnprior:

- The Town of Arnprior has a total of 806,000 square feet of vacant and occupied retail-commercial space. This space is comprised of:
 - 1) 90,000 square feet of food and beverage retail (FBR).
 - 2) 290,400 square feet of non-food and beverage retail (NFBR)
 - 3) 382,000 square feet of Service space.
 - 4) 43,600 square feet of vacant space meaning a vacancy rate of 5.4%.

- The **Highway Commercial** node is located east of the 417, White Lake Rd and Daniel St interchange. It contains a total of 304,400 square feet of retail commercial space representing 37.7% of space Town-wide. This space is comprised of:
 - 1) 72,200 square feet of FBR, making it the only node in the Town with supermarkets .
 - 2) 133,800 square feet of NFBR.
 - 3) 63,700 square feet of service space.
 - 4) 34,700 square feet of vacant space. The majority of this space is due to the former TSC/Peavey Mart building (31,400 square feet), which is currently for lease / sale.

- **Mixed Use Residential/Commercial** is located east of the Highway Commercial node and west of Downtown along Daniel St S. It contains a total of 35,300 square feet of retail commercial space representing 4.3% of space Town-wide. This space is comprised of:
 - 1) 8,200 square feet of NFBR.
 - 2) 27,100 square feet of service space.
 - 3) There are two vacant buildings on Daniel St S, however likely due to their derelict nature, the Town in providing information to us, also included this parcel as, “underutilized land”. Therefore, it is the



professional opinion of TR to exclude these buildings from the inventory.

- **Downtown Arnprior** is located east of the Mixed Use / Residential Commercial node. It has two main streets, Elgin St W and John St N, which meet perpendicularly to one another. It contains 304,600 square feet of retail commercial space representing 37.8% of space Town-wide. The space is comprised of:

- 1) 7,500 square feet of FBR.
- 2) 99,000 square feet of NFBR.
- 3) 189,200 square feet of service.
- 4) 8,900 square feet of vacant space resulting in a vacancy rate of 2.9%



Downtown Arnprior along John St North

- The **Madawaska Blvd.** node is located south of the Downtown across Madawaska River along Madawaska Blvd. It contains a total of 80,200 square feet of retail commercial space representing 10.0% of space Town-wide. The space is comprised of:

- 1) 10,300 square feet of FBR.
- 2) 34,100 square feet of NFBR.
- 3) 35,800 square feet of service space.



Retail plaza along Madawaska Blvd including Subway, Valley Roots Butcher, Cold Bear Brewing

- **Other** is the rest of the Town's retail and service space outside of areas with any large-scale retail concentration. These areas contain 79,600 square feet of retail commercial space representing 10.2% of space Town-wide. This space is comprised of:

- 1) 15,300 square feet of NFBR.
- 2) 66,200 square feet of Service space.

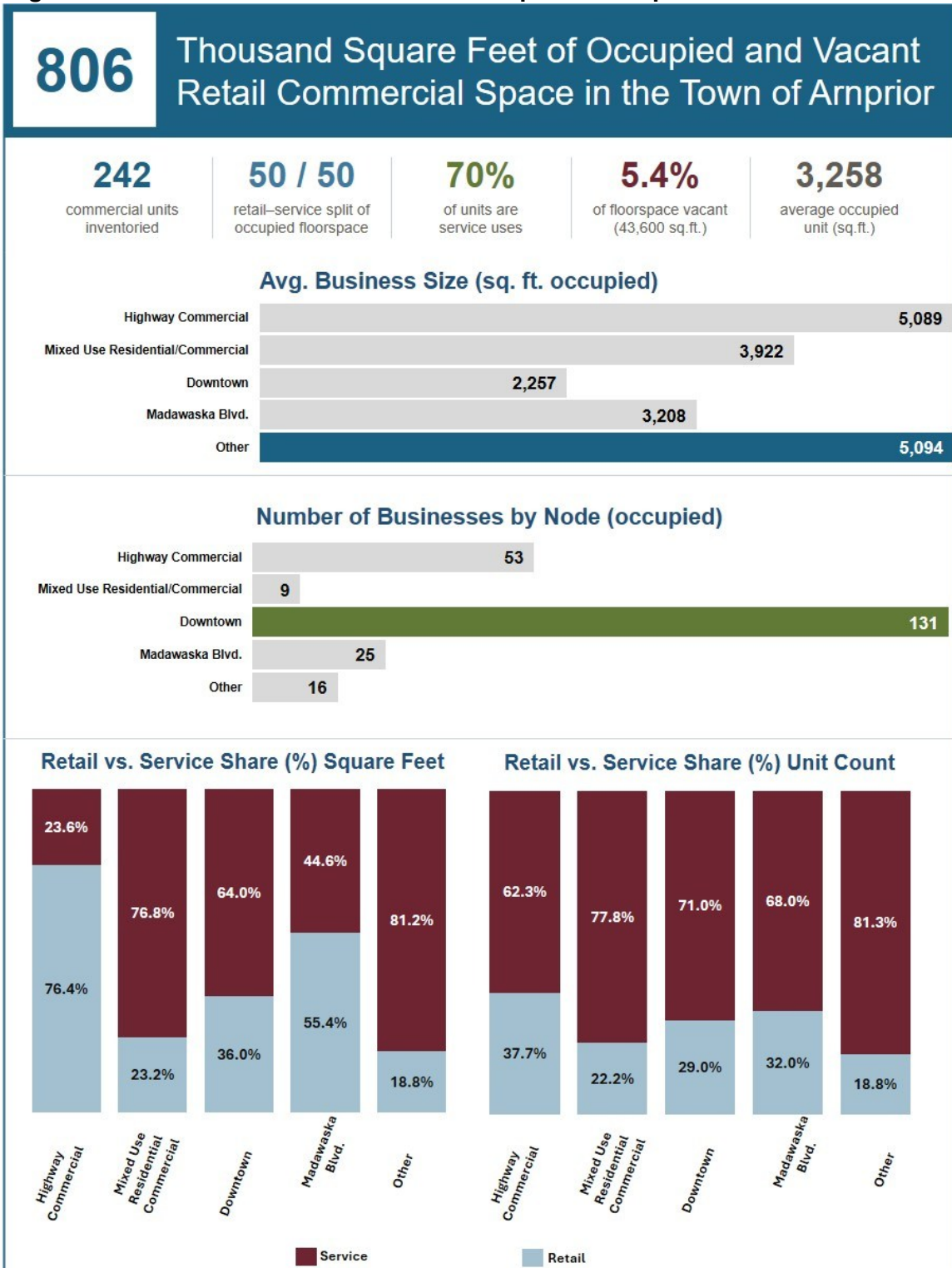


Iron and Woods Indoor Golf and the Arnprior water tower

3.3 Arnprior Retail Commercial Context Analysis

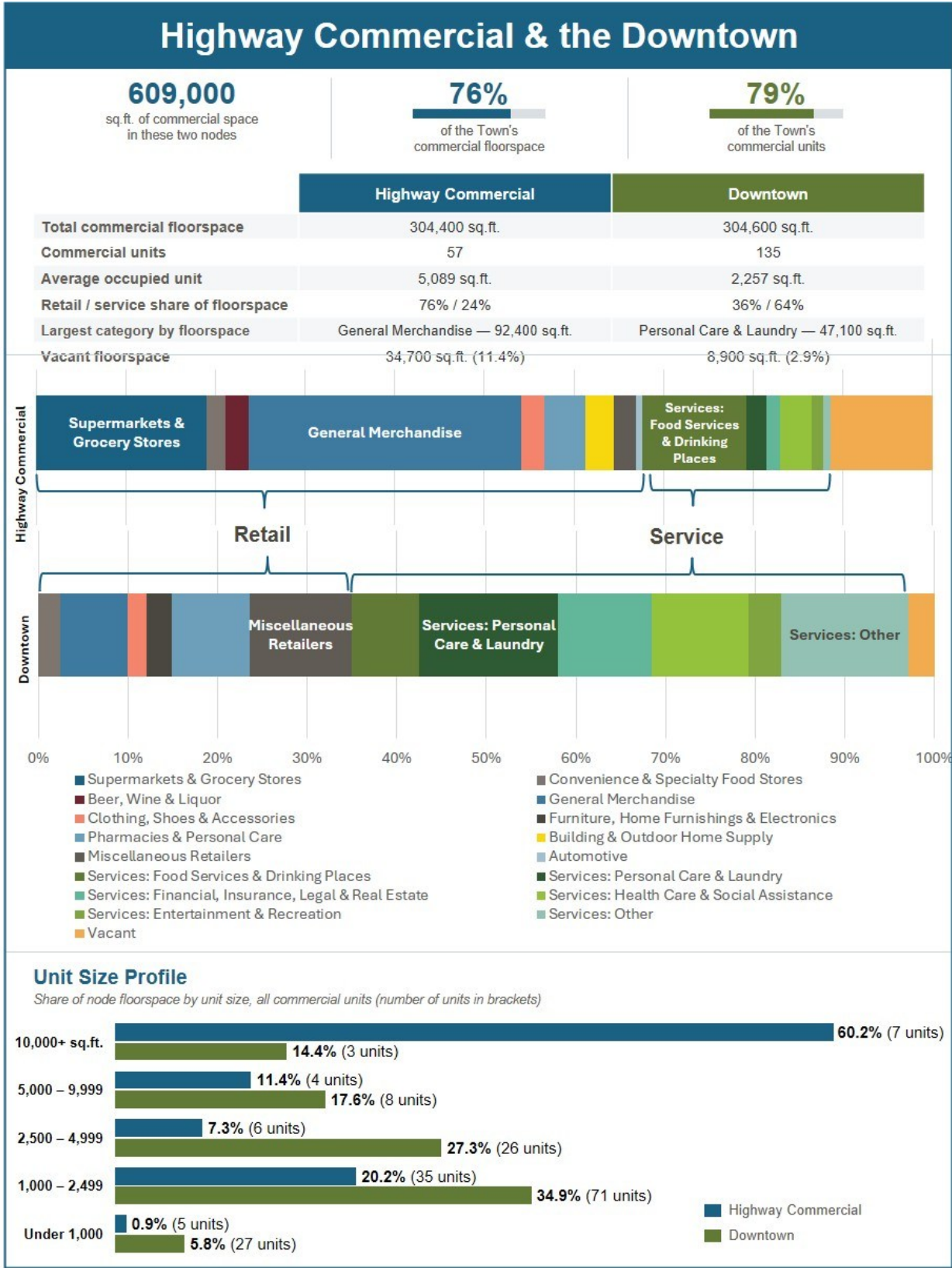
Figures 3-3 to 3-5 provide an in-depth assessment of the retail commercial inventory.

Figure 3-3: Structure of Retail Commercial Space in Arnprior



Source: Tate Research

Figure 3-4: Structure of Retail Commercial Space in the Main Nodes



Source: Tate Research

Figure 3-5: Arnprior Per Capita Retail Commercial Space Comparison

66.3 Retail Commercial Per Capita Ratio

	Arnprior	North Perth	Bolton	Alliston	Blue Mountains	Typical Ratio
<i>Square feet per capita</i>						
Food & Beverage Retail (FBR)						
Supermarkets & Grocery Stores	5.0	4.1	3.3	4.3	5.1	3.2
Convenience & Specialty Food Stores	1.7	1.0	0.8	1.2	2.7	0.8
Beer, Wine & Liquor	1.1	0.4	0.5	1.3	1.0	0.4
Food & Beverage Retail (FBR)	7.8	5.6	4.6	6.8	8.8	4.4
Non-Food & Beverage Retail (NFBR)						
General Merchandise	10.0	8.5	8.9	11.1	-	7.8
Clothing, Shoes & Accessories	1.3	2.0	1.0	1.2	1.3	0.9
Furniture, Home Furnishings & Electronics	0.7	1.7	0.9	1.3	1.5	0.8
Pharmacies & Personal Care Stores	3.5	0.9	1.1	1.0	1.2	1.0
Building & Outdoor Home Supplies	3.3	2.6	3.9	4.3	6.1	3.6
Miscellaneous Retailers	5.4	2.8	2.0	4.2	5.4	1.9
Automotive	1.0	1.1	0.7	0.7	-	0.6
Subtotal Non-Food & Beverage Retail (NFBR)	25.3	19.6	18.5	23.8	15.5	16.6
Service Space						
Food Services & Drinking Places	8.0	3.0	5.1	4.6	5.8	5.1
Personal Care & Laundry Services	4.9	1.1	2.5	2.4	1.1	2.5
Financial, Insurance, Legal & Real Estate Services	3.9	5.4	2.3	3.2	1.5	2.3
Health Care & Social Assistance Services	6.7	2.4	3.3	3.9	2.9	3.3
Entertainment & Recreation Services	4.1	3.9	1.8	4.8	1.7	1.8
Other Services	5.7	2.6	2.5	3.0	5.6	2.5
Subtotal Service Space	33.2	18.4	17.5	21.9	18.6	17.5
Total Occupied Retail & Service Space	66.3	43.5	40.6	52.5	42.9	38.5
Populations When Inventory was Conducted	11,500	18,500	34,600	23,900	7,800	
Lowest to Highest Per Capita by Category						

The sample municipalities are municipalities in which TR has conducted retail commercial inventories and is therefore confident in the per capita comparison. The intent is to provide context for Arnprior's per capita ratio not to directly compare Arnprior with the other municipalities.

Source: Tate Research

The following observations are made with respect to Figures 3-2 to 3-5:

- Overall, Arnprior's square feet per capita of retail commercial space is very high compared to typical ratios and other markets. One of the reasons for this is that Arnprior serves a larger Trade Area that includes the surrounding rural municipalities including McNab / Braeside and portions of Mississippi Mills.
- Typically, a balanced retail to service ratio is 60 / 40. In Arnprior, the retail to service ratio is 50 / 50. This generally indicates a more localized retail commercial offering. This is verified by the high per capita ratios specifically in the service categories.
- Retail space is concentrated in a smaller number of larger-format premises, while services occupy a greater number of generally smaller units.
- Overall commercial vacancy is 5.4% or approximately 43,600 square feet. However, this is largely attributable to the former TSC/Peavy Mart building, which represents about 31,400 square feet, or 72% of all vacant space. Excluding this single large vacancy, the Town-wide vacancy rate is approximately 1.6%, indicating a relatively limited supply of available commercial space. Typical vacancy rates are between 5.0% – 7.5%.
- The Highway Commercial node and Downtown are Arnprior's two principal commercial nodes, each containing about 300,000 square feet of retail commercial space. Together, they account for approximately three quarters of the Town's commercial inventory.
- The Highway Commercial node is Arnprior's principal large-format and everyday needs retail node. It contains the Town's supermarkets, general merchandise retailers, and large-format stores, including Canadian Tire, Metro, and No Frills. Retail uses account for most of its occupied space, while the relatively smaller service businesses make up most individual units.
- Downtown has a distinctly different role. It is composed primarily of smaller commercial units and contains more than half of Arnprior's commercial establishments. Its mix is more service-oriented, with a concentration of personal care, professional, health care, and other services, alongside independent retailers, specialty shops, restaurants, and food services.

- The remaining commercial nodes serve more specialized functions. The Madawaska Blvd. node is anchored by building and outdoor home supply retail and automotive-related uses, while the Mixed Use Residential/Commercial and Other areas are smaller and more service-oriented.

3.4 Proposed and Potential Retail Commercial Supply

As part of this Retail Demand Study, TR also examined the proposed and planned future commercial supply. This section and the next indicate the amount of future proposed and potential space that could potentially accommodate the future demand quantified in Section 6 of this report.

Figure 3-6: Arnprior Proposed Retail Commercial Developments

Project Name / Address	File Number	Retail Commercial Potential (sq. ft.)	Summary of Development	Status
375 Daniel St. S.	SPC 2-22	2,038	New non-residential building with drive-through on the existing mall property (2038 sq. ft.)	Site plan agreement drafted - waiting on applicant to sign since December 4, 2023. Application still open. No recent indications of plans to move ahead.
449 Hartney St	SPC 5-24	6,400	Two 595 sq. m (6,400 sq. ft.) mixed non-residential uses buildings (total 12,800 sq. ft.)	Site Plan agreement signed April 22, 2025 – Partial occupancy granted
TOTAL		8,438		

Source: Tate Research based on data provided by the Town of Arnprior. Parcel sizes are based County of Renfrew Property Parcels (June 16, 2026 update). Where a discrepancy exists in the parcel boundary between the Town Zoning layer and the County parcel layer, the County parcel layer was used.

Figure 3-6 summarizes the potential retail commercial developments that are within the planning application process or under construction.

The following observations are made with respect to the proposed space:

- There are two active development applications that could accommodate future retail commercial space in Arnprior. Combined, these applications represent approximately 8,400 square feet of potential retail commercial space.
- The development at 375 Daniel Street South remains in the application stage. Although a site plan agreement has been drafted, the applicant has not signed the agreement since December 4, 2023, and there have been no recent indications that the project is moving forward.

- The application at 449 Hartney Street is further advanced. The site plan agreement was signed on April 22, 2025, and part of the development has already been delivered.
- Given the status of the two applications, the full 8,400 square feet should be viewed as potential future supply rather than confirmed near-term retail space. The space associated with 449 Hartney Street is more likely to be realized in the near term, while the 375 Daniel Street South proposal remains uncertain in the short term.

3.5 Vacant Retail Commercial

In addition to the proposed retail commercial space, the Town of Arnprior also includes vacant commercial designated lands that could accommodate future demand. Figure 3-7 illustrates the vacant retail commercial lands in Arnprior. The following observations are made with respect to Figure 3-7:

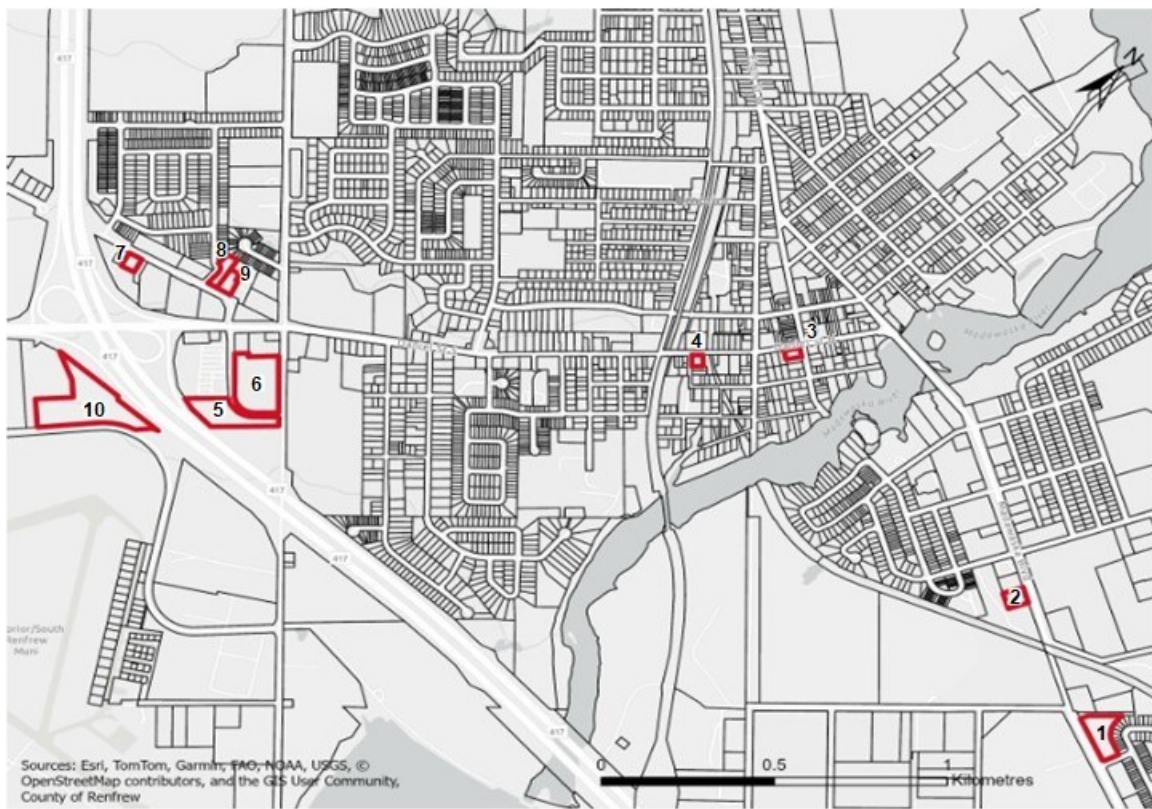
- There are 10 vacant land parcels that can accommodate future commercial demand. These 10 parcels total 23.07 acres.
- Five of these parcels are located in the Highway Commercial node and one is located on the west side of Highway 417. Combined these 6 parcels account for 19.35 acres or 84% of the total vacant parcels.
- There are two vacant parcels in the Downtown (Map Key #3 and #4). One of these parcels, Map Key 3, is known to have contamination issues.
- Overall, the average size of the vacant parcels is 2.31 acres. At 25% coverage the average retail commercial development per site would be approximately 25,000 square feet. The largest vacant commercial parcel could accommodate approximately 90,000 square feet (Map Key #10).
- It should be noted that despite the lack of vacant commercial land around the Madawaska Boulevard node, there could be future opportunities to provide commercial space through ground floor commercial in mixed-use developments.

In addition, to vacant commercial designated parcels, there are approximately 14 parcels that have various existing uses on them but have been identified by the Town as “underutilized”. These 14 parcels total approximately 96 gross acres (i.e. including the existing uses). These 14 parcels are identified in Figure 3-8.

While TR has not conducted a precise analysis of retail commercial potential on these lands (i.e. whether development would occur in addition to the uses on the site or would the sites be fully redeveloped), it is apparent that development potential exists on both Daniel Street South / White Lake Road and Madawaska Boulevard. In addition, should larger uses be attracted to Arnprior there are lands available to accommodate them.

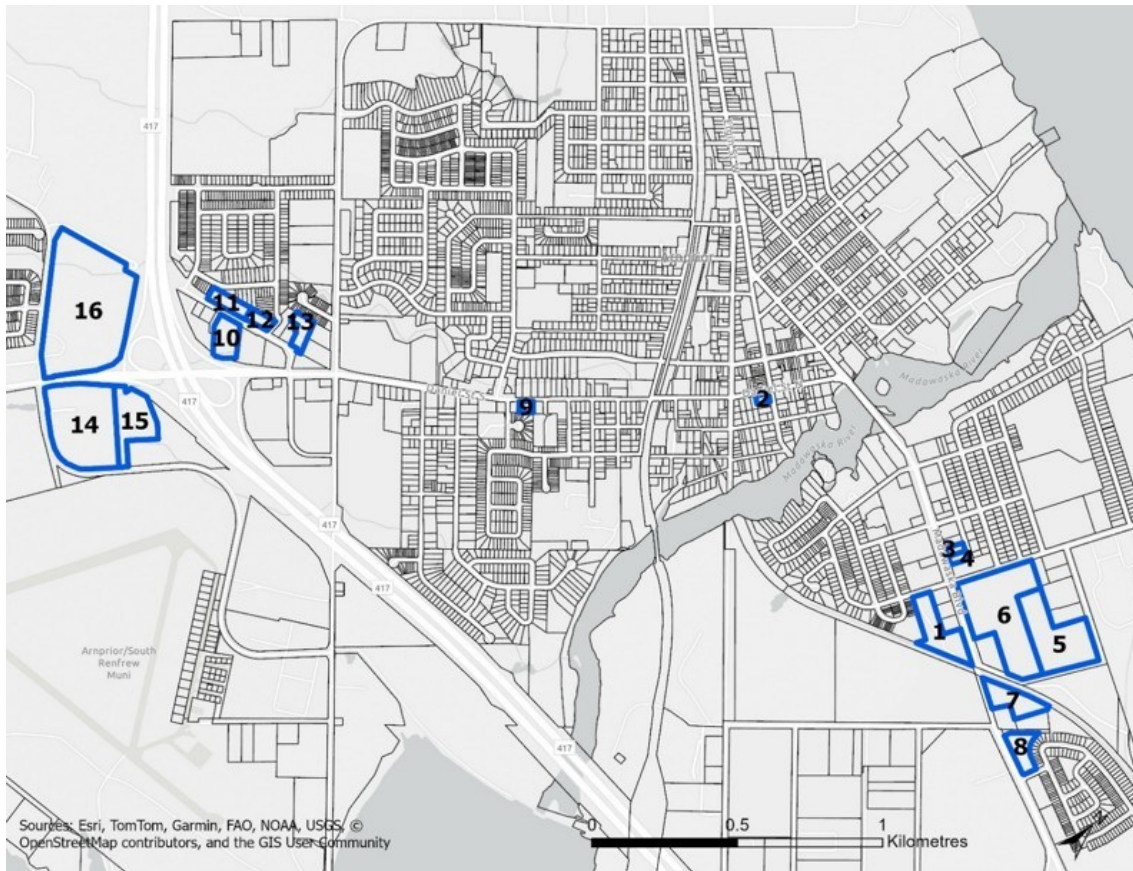
Figure 3-7: Arnprior Vacant Retail Commercial Designated Lands

Map Key	Street #	Street Name	Existing Use	Acres
1		Madawaska Blvd. & Decosta St.	Vacant	2.32
2	96	Madawaska Blvd.	Vacant	0.78
3	95	Daniel St. N.	Vacant	0.32
4	25	Daniel St. N.	Vacant	0.30
5		Winners Circle & Baskin Dr. E.	Vacant	3.39
6		Winners Circle & Baskin Dr. E.	Vacant	5.57
7		Staye Court Dr.	Vacant	0.49
8	39	Staye Court Dr.	Vacant	0.79
9	39	Staye Court Dr.	Vacant	0.68
10		417 & Whitelake Rd.	Vacant	8.42
Total				23.07



Source: Tate Research based on data provided by the Town of Arnprior. Parcel sizes are based County of Renfrew Property Parcels (June 16, 2026 update). Where a discrepancy exists in the parcel boundary between the Town Zoning layer and the County parcel layer, the County parcel layer was used.

Figure 3-8: Arnprior Underutilized Commercial Lands



Source: Tate Research based on data provided by the Town of Arnprior.

3.6 Arnprior Commercial Context Summary

The retail commercial hierarchy in Arnprior represents a spatially well balanced offering.

- The Town contains approximately 816,500 square feet of retail commercial space, including 771,500 square feet of occupied space. Retail and service space are evenly represented in terms of square footage, although retail is concentrated in fewer, larger premises while services occupy a greater number of smaller units.
- Arnprior's commercial activity is concentrated in two main areas: the Highway Commercial node and Downtown, each accounting for approximately 37% of the Town's total retail commercial inventory. The Highway Commercial node accommodates large-format, everyday needs retail, including the Town's two supermarkets, general merchandise stores, and national and international chains. Downtown is more service-oriented and contains a concentration of smaller local businesses.

- Based the inventory of vacant commercial lands and under utilized lands, There are several options for new retail development along both Daniel Street South / White Lake Road and Madawaska Boulevard. There are limited options for new development in the downtown.

4 Socio-Economic Characteristics

This section of the report examines the socio-economic characteristics of Arnprior residents. The purpose of examining these characteristics is to inform recommendations on future commercial targets.

4.1 Segmentation Profile

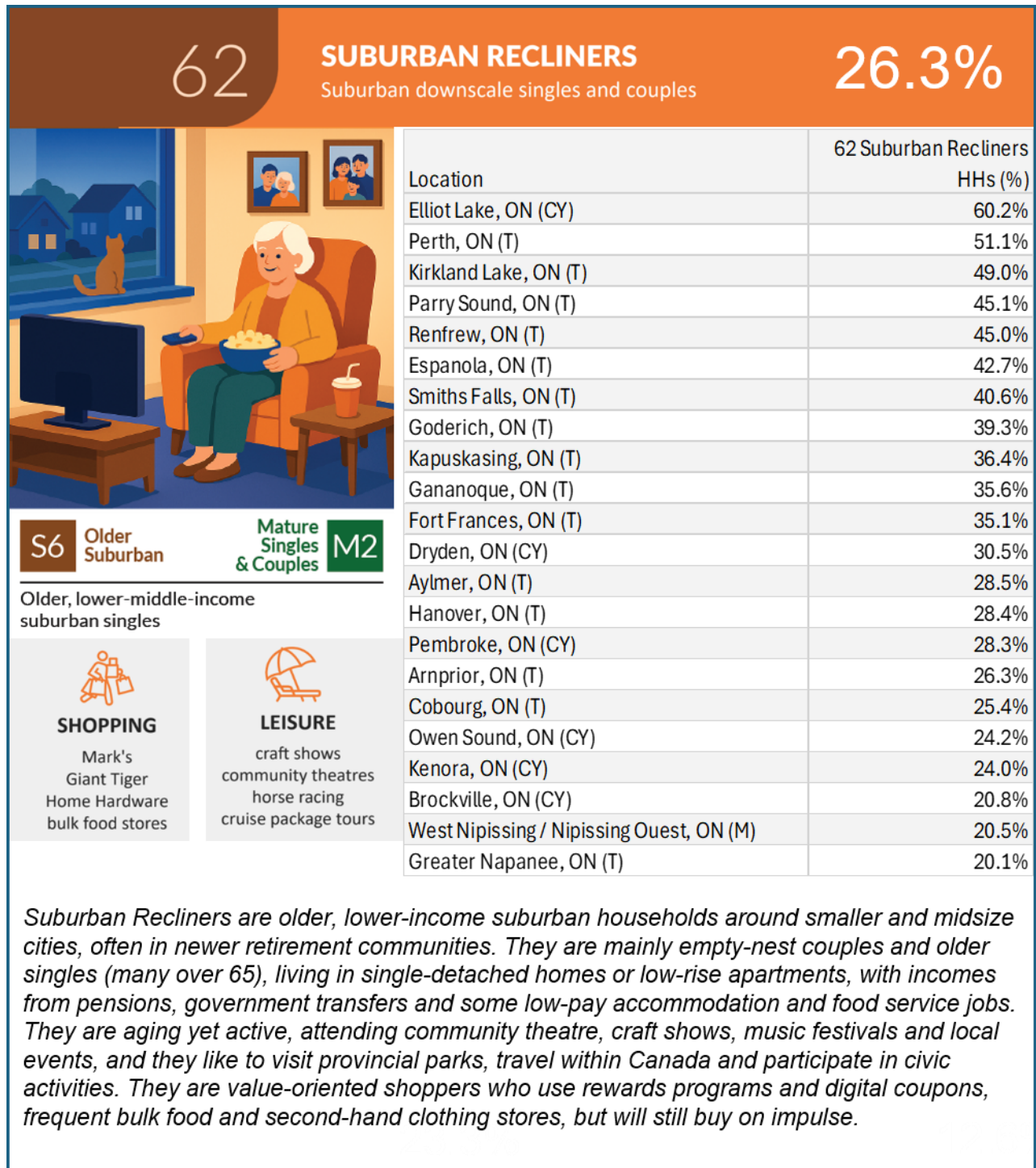
In order to assess opportunities for additional retail commercial uses, market segmentation can provide unique insights into demand characteristics. PRIZM is a consumer segmentation system developed by Environics Analytics, which classifies Canada's neighborhoods into 67 distinct lifestyle segments. It integrates demographic, geographic, and psychographic data from various sources to identify unique lifestyle types, allowing businesses, non-profits, and governments to understand and analyze their customers and markets.

There are two dominant PRIZM profiles in Arnprior which combined represent approximately half of all households in Arnprior:

- 26.3% of all households are categorized as “Suburban Recliners”.
- 23.4% of all households are categorized as “Scenic Retirement”.

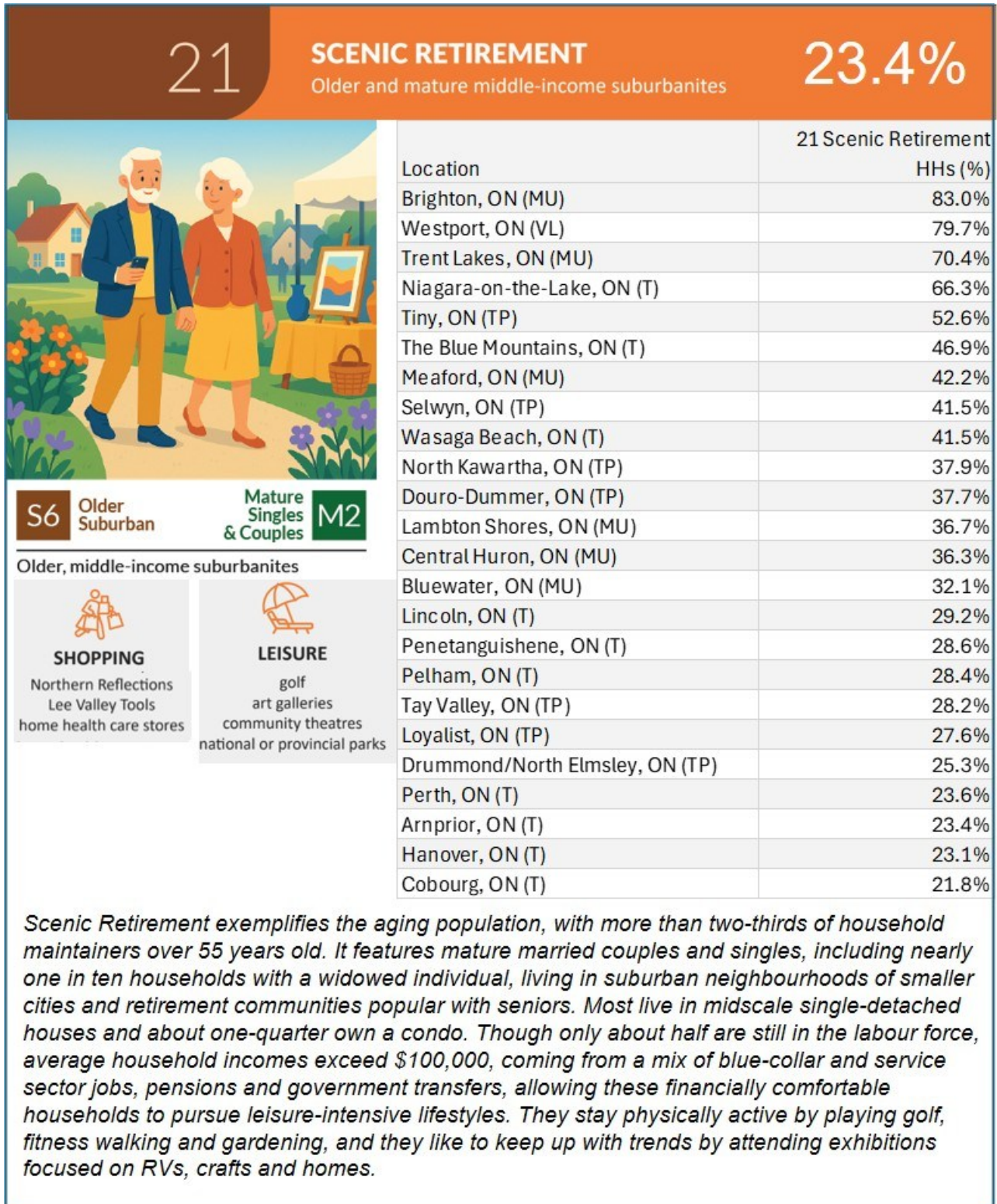
These profiles are illustrated on the following pages.

Figure 4-1: Arnprior PRIZM Segmentation – Suburban Recliners



Source: Tate Research. ArcGIS Business Analyst, Environics Analytics PRIZM Profile.

Figure 4-2: Arnprior PRIZM Segmentation – Scenic Retirement

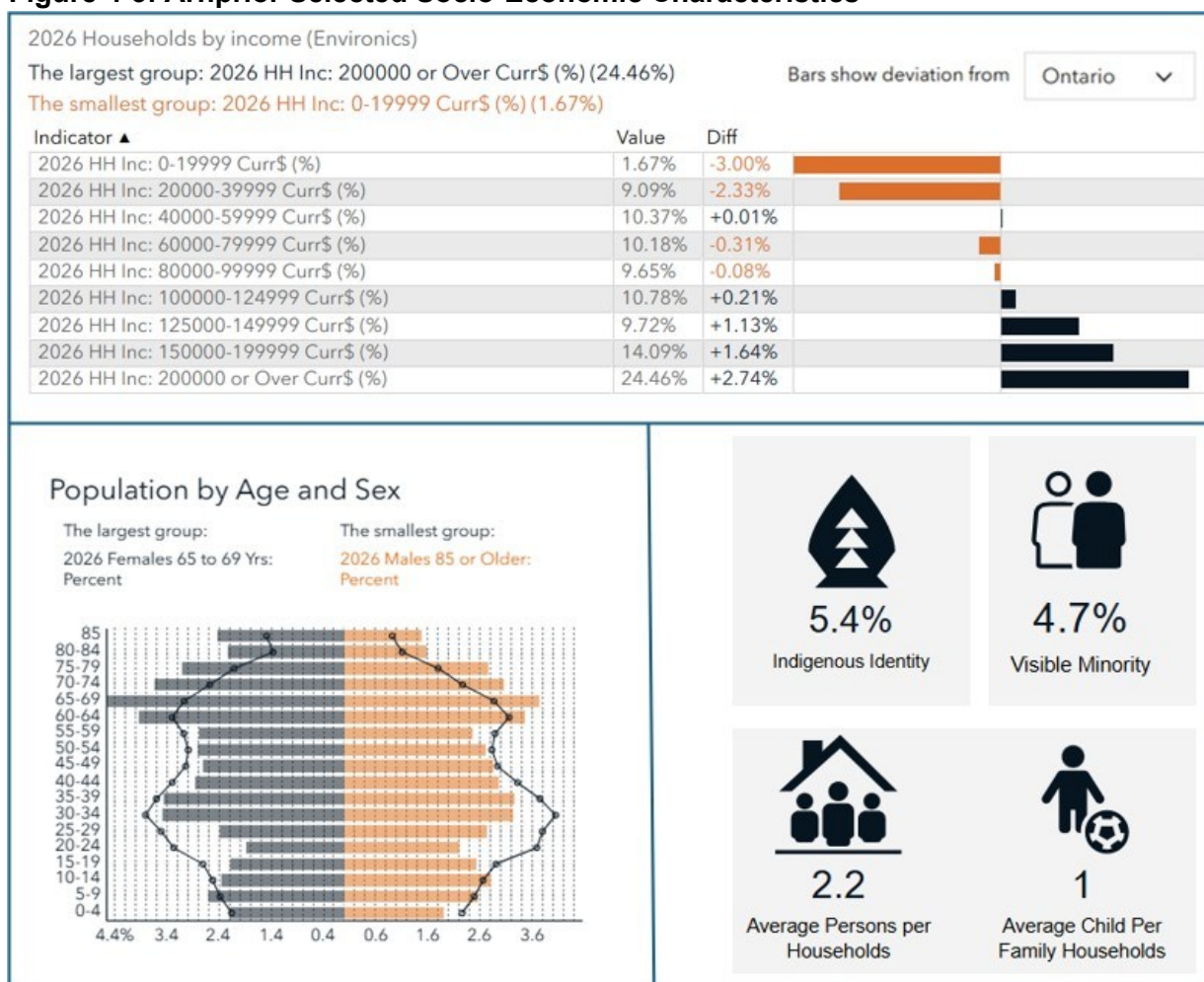


4.2 Selected Socio-Economic Characteristics

Figure 4-3 illustrates Arnprior's household income, age profile, population and household profiles which together provide an indication of local purchasing power and the demographic groups that are likely to influence retail and service demand.

- Arnprior has a relatively strong household-income profile, with 24% of households' earnings more than \$200,000 and further 14% earning between \$150,000 and \$199,999.
- Overall, approximately 38% of households earn \$150,000 or more, indicating substantial purchasing power.
- Low-income households represent a smaller share of the market, with only 2% earning less than \$20,000 and 9% earning between \$20,000 and \$39,999.

Figure 4-3: Arnprior Selected Socio-Economic Characteristics



Source: Tate Research. ArcGIS Business Analyst, Envionics Analytics.

- The largest age cohort is females aged 65 to 69, indicating a significant older-adult population and potential demand. The population profile also shows a substantial concentration of residents in the 55-to-74 age groups.
- The average persons per household and children per household are both consistent with an older population.
- Compared with Ontario, Arnprior's income distribution and age profile indicate a market with both high purchasing power and an important older consumer base.

4.3 Socio-Economic Characteristics Summary

Arnprior's socio-economic profile is characterized by an older resident base.

- The two largest PRIZM segments – Suburban Recliners (26% of households) and Scenic Retirement (23%) – together account for nearly half of all households and reflect a strong presence of older adults, retirees, and empty-nest households. These groups are generally active in community life, value-oriented in their purchasing decisions, and interested in leisure, recreation, local events, travel, and home-related activities.
- It should be noted that the Suburban Recliners PRIZM segment is also the dominant segment in Renfrew (45.0% of households), Pembroke (28.3% of households) and Carlton Place (17.5% of households). The implication is that the same dominant household profiles are being served in the surrounding main population centres. This makes it harder for Arnprior to differentiate itself from its competitors.
- Household incomes indicate meaningful local purchasing power. At the same time, the relatively small share of lower-income households suggests that Arnprior has the capacity to support an expanded range of retail and service offerings, including quality convenience retail, restaurants, health and wellness services, personal services and specialty goods.
- The age profile reinforces this opportunity as Arnprior has a notable concentration of residents aged 55 to 74.

5 Quantitative Retail Commercial Gap Analysis

This section of the report examines the commercial gap analysis from a quantitative perspective. The results of this analysis, along with the findings in the balance of the report, will inform our recommendations.

5.1 Background Methodology and Assumptions

To quantify the commercial gap in a marketplace, the expenditure potential is balanced against the supply of space. To conduct this analysis, the following methodology was utilized:

- TR calculated the 2026 Arnprior population by assuming a straight-line progression between the corresponding known population figures for 2022 and 2027 in the Water & Wastewater Master Plan Update Study.⁷
- TR calculated the per capita expenditures for various retail categories based on Statistics Canada Retail Trade data. Specifically:
 - 1) Statistics Canada provides Retail Trade data for the Province as a whole. TR converts this data to per capita expenditures for various retail categories.
 - 2) In order to translate these Provincial figures to Arnprior figures, TR uses regression equations to account for the differential in income between the Province and Arnprior.
 - 3) TR then adjusts the per capita incomes to account for expenditures that are made online. The result is a set of per capita expenditures for Arnprior residents that are made at “brick and mortar” stores.

⁷ Town of Arnprior Water & Wastewater Master Plan Update - November 15, 2024. 2022 population: 10,038; 2027 population: 11,989.

- The per capita expenditures are multiplied by the population of Arnprior resulting in the expenditure potential for the various retail categories.
- The expenditure potential is then converted to square feet using industry-accepted sales per square foot standards. The result is the amount of the retail space that can be supported by Arnprior residents.
- The amount of supported space is then measured against the existing supply of retail commercial space to assess whether there are gaps in the marketplace from a quantitative perspective; and,
- TR also conducted a service space gap analysis using per capita ratios calculated by TR through an examination of hundreds of inventories conducted across the Province. For this analysis, TR calculated the per capita ratio of the existing service space and then compared that to the target amount based on the industry standards.

There are a number of assumptions that are made with respect to the gap analysis. Specifically, we made the simple assumption of inflow=outflow.⁸

5.2 Retail Gap Analysis

Figure 5-1, on the following page, illustrates the results of the gap analysis.

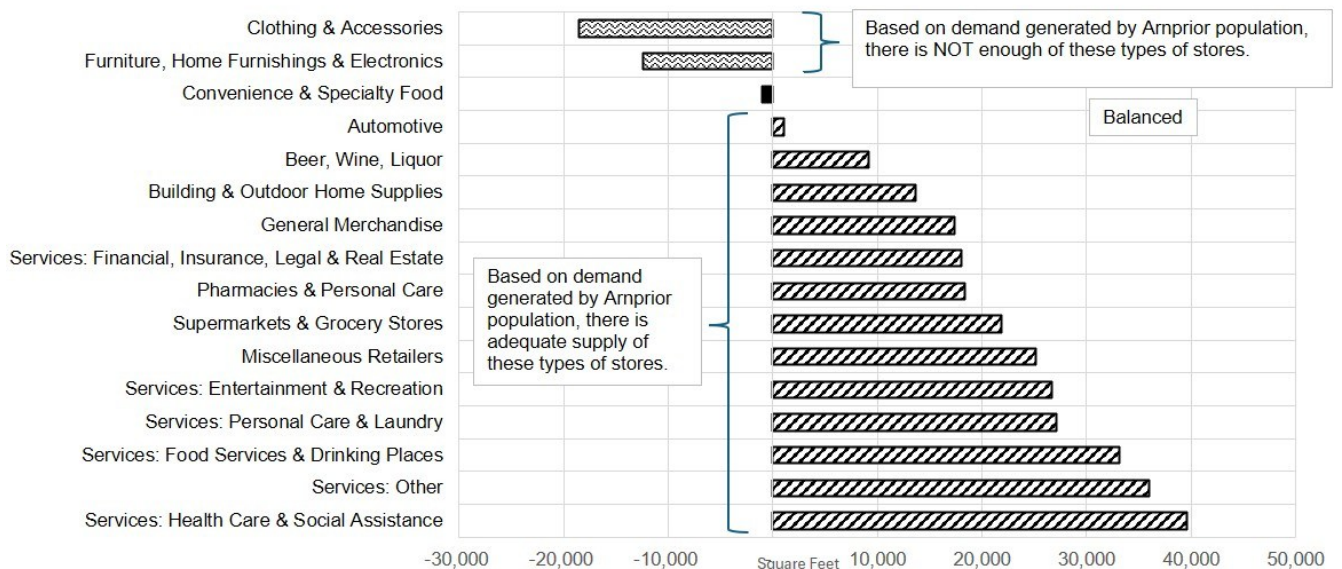
The gap analysis represents an economic development tool which points to which categories should be targeted. There are several caveats associated with the gap analysis:

- If a quantitative gap is present, that does not necessarily mean that those store categories are appropriate for Arnprior. There may be a market reason for the gap. For example, there may not be sufficient population thresholds, or there may be a dominant operator in that category that is keeping businesses out.

⁸ Generally, this implies that all of the expenditures made by Arnprior residents are spent at retailers and service providers in Arnprior. Conversely, it also means that nobody who resides outside of Arnprior spends any of their retail and service expenditures in Arnprior. In practice we know that this is not true. We have anecdotal, as well as mobility data evidence, which indicates that Arnprior residents' shop in other areas as well as people who live in other areas shop in Arnprior. Without conducting an expenditure survey, it is difficult to establish whether there is a net inflow or outflow of dollars into / from Arnprior. For these reasons, TR has made the simplifying assumption that inflow=outflow.

- Conversely, if there is no quantitative gap, this also does not mean that those store categories are not warranted. For example, while there appears to be no gap in the supermarket category, there may be an opportunity for a new banner to enter the market that currently does not exist.
- The final recommendations in this report consider the inventory function, socio-economic character and TR professional judgement.

Figure 5-1: Arnprior Quantitative Gap Analysis (sq. ft.)



Source: Tate Research

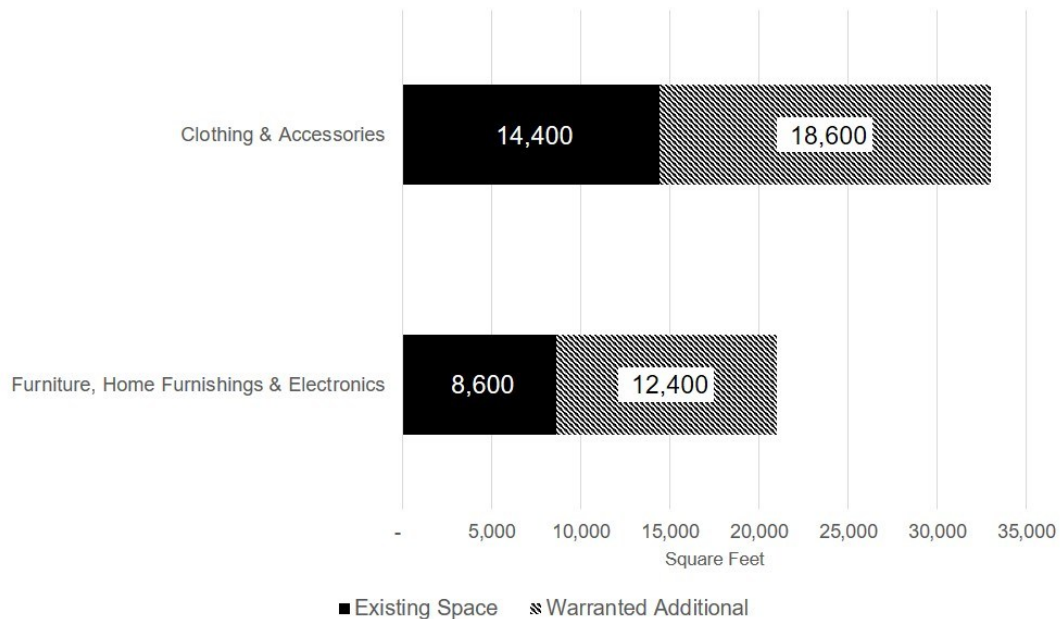
The following observations are made with respect to the gap analysis:

- The horizontal waved bars, in the upper portion of Figure 5-1, represent categories where a deficit of space exists in Arnprior. This indicates that demand exceeds supply and is defined as a gap in the market
- The solid bar, in the mid portion of Figure 5-1, represents the category where there is currently no gap under the analysis assumption of inflow=outflow.
- The upward striped bars, in the lower portion of Figure 5-1, represent categories where a surplus of space exists in Arnprior. This indicates that supply exceeds demand.

5.2.1 Categories with Gaps

- There are 2 categories of retail and service space in which demand exceeds supply. In other words, there is a gap in the following categories:
 - 1) Clothing & Accessories – 18,600 square feet
 - 2) Furniture, Home Furnishings & Electronics – 12,400 square feet
- If addressed, the gaps represent a significant increase over the existing space, as illustrated in Figure 5-2.

Figure 5-2: Quantum of Gap Analysis Space versus Existing Space



Source: Tate Research

5.2.2 Balanced Categories and Categories with No Gaps

Figure 5-1 also illustrates the categories that are balanced or do not have gaps.

Balanced Categories

- Convenience & Specialty Food
- Automotive
- Beer, Wine, Liquor

- Building & Outdoor Home Supplies
- General Merchandise
- Services: Financial, Insurance, Legal & Real Estate
- Pharmacies & Personal Care
- Supermarkets & Grocery Stores
- Miscellaneous Retailers
- Services: Entertainment & Recreation
- Services: Personal Care & Laundry
- Services: Food Services & Drinking Places
- Services: other
- Services: Health Care & Social Assistance

These categories have a sufficient amount of space from an expenditure and per capita perspective. However, as stated previously, this does not mean there is no demand for businesses in these categories.

5.3 Retail Gap Analysis Summary

The largest gaps exist in Clothing & Accessories (particularly in men's clothing), and Furniture, Home Furnishings & Electronics. These categories are commonly purchased online or at larger regional retail destinations. The identified gap reflects expenditure leakage and may be addressed through smaller differentiated, or specialty retail opportunities.

6 Future Retail Commercial Demand Analysis

The previous section examined the gap analysis based on the current population and inventory of retail commercial space in Arnprior. This section of the report examines the future demand for retail commercial space based on the future population of Arnprior.

Municipal Retail Demand Studies have become increasingly complex. In the past, demand for retail space would be quantified and balanced against the amount of greenfield land. The demand and supply sides have become more complicated. On the demand side, e-commerce, changing demographics and shopping habits, as well as new store network requirements have meant re-thinking and segmenting commercial demand into components that are store based, and components that can be fulfilled through other means, including e-commerce, click & collect, and 'buy online pick up in store'.

This section of the report assesses the quantum of retail commercial space that could potentially be supported in Arnprior.

6.1 Commercial Needs Methodology

From a retailer perspective, the industry is moving towards the understanding that "a sale is a sale" regardless of where that sale occurs, whether physically in a store or online and delivered or bought online and picked up in store. The intent is to provide the customer with a seamless interchangeable experience whether in store or online.

For an analysis such as this, one of the issues to be addressed is how much physical commercial space should be planned for and what types of economic development policies can be formulated and implemented to support the introduction of this space into Arnprior.

Therefore, for this analysis, we have made assumptions of how much of future retail commercial space will be served through "ground oriented" retail

commercial space accounting for the fact a portion of demand will be served through e-commerce.

We have conducted an expenditure analysis for the FBR and the NFBR categories. Combined, these categories represent the “retail” categories, and include physical locations where goods are purchased.

We have utilized a per capita approach to quantify the future service space needs of Arnprior residents. The service category represents physical locations where services are purchased or rendered such as bank branches, restaurants, hair salons, etc.

6.2 Population Growth

The primary factor driving any retail expenditure and per capita analysis is population. Population growth was discussed in Section 1.2. To summarize, Arnprior population is forecast to increase from 11,500 persons in 2026 to 16,700 persons in 2041.

Figure 6-1: Arnprior Population Growth

	2021	2026	2031	2036	2041
Town of Arnprior	9,900	11,500	13,600	15,200	16,700
Period Change		1,600	2,100	2,100	1,600
Average Annual Growth		320	420	420	320
Average Annual Growth		3.2%	3.7%	3.1%	2.1%

Source: Town of Arnprior Water & Wastewater Master Plan Update - November 15, 2024
The 2026, 2031, 2036, and 2041 population estimates were calculated by assuming a straight-line progression between the corresponding known population figures for 2022, 2027, 2031, and 2042 in the W&WWMP Study.

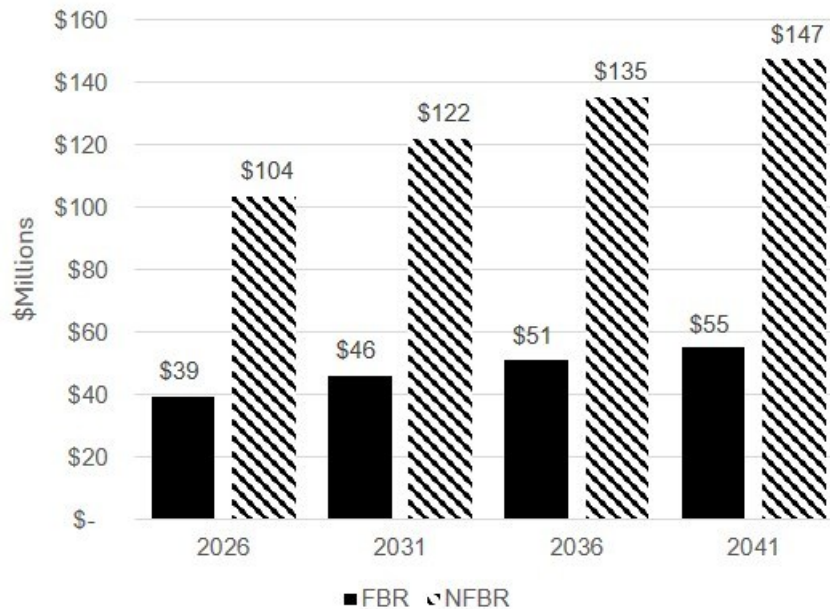
6.3 Commercial Expenditure Growth

Figure 6-2 illustrates Arnprior’s retail expenditure for the 2026 – 2041 period.⁹

- Food & Beverage Retail expenditures are forecast to increase from \$39 million annually in 2026 to \$55 million annually by 2041. This represents an increase of \$16 million in annual expenditure by 2041.

⁹ Retail expenditures are calculated for the FBR – Food Oriented Retail and NFBR – Non-Food Oriented Retail categories.

Figure 6-2: Arnprior FBR and NFBR Expenditure Forecast



Source: Tate Research

- Non-Food & Beverage expenditures are forecasted to increase from the current level of \$104 million annually to \$147 million annually by 2041. This represents an increase of \$43 million in annual expenditures by 2041.
- The expenditure potential in Figure 6-2 represents the estimated amount that Arnprior residents currently spend, and are forecast to spend, at physical retail stores, excluding e-commerce purchases. These purchases may occur at stores in Arnprior or beyond.
- For the future years, from the land use planning perspective, the implication of the increase in expenditure potential is the requirement for an increase in retail commercial space to serve this demand.

6.4 Commercial Needs Analysis 2026 – 2041

Figure 6-3 illustrates the additional retail commercial space required by 5-year increments based on population growth and TR adjustments.

Figure 6-3: Arnprior 2041 Retail Commercial Needs (square feet)

	2031	2036	2041
	Square Feet		
Food & Beverage Retail (FBR)			
Supermarket	6,700	10,400	13,300
Specialty Food	4,400	6,000	7,000
Beer, Wine & Liquor	-	600	1,100
Sub-total FBR	11,100	17,000	21,400
Non Food & Beverage Retail			
Automotive	3,100	4,800	5,100
Furniture, Home Furnishings & Electronics	2,000	3,000	3,700
Building & Outdoor Home Supplies Stores	5,100	7,500	9,200
Pharmacies & Personal Care Stores	5,700	9,300	11,900
Clothing & Accessories Stores	3,800	6,000	7,300
General Merchandise Stores	17,400	26,700	33,000
Miscellaneous Retailers	5,800	9,000	10,900
Sub-total NFBR	42,900	66,300	81,100
Total Retail (FBR + NFBR)	54,000	83,300	102,500
Service Space			
Food Services & Drinking Places	9,700	15,200	19,200
Personal Care & Laundry Services	4,800	7,800	9,900
Financial, Insurance, Legal & Real Estate Services	4,400	7,000	8,800
Health Care & Social Assistance Services	6,900	12,200	17,200
Entertainment & Recreation Services	3,400	5,200	6,800
Other Services	4,800	7,800	9,900
Total Service	34,000	55,200	71,800
Total Retail & Service (sq. ft.)	88,000	138,500	174,300

Source: Tate Research

The following notes relate to the findings summarized in Figure 6-3:

- The commercial needs analysis represents a point in time. The resulting 2041 warranted demand is highly dependent on population forecast being achieved as well as market conditions that, in many cases, are independent of demand. Despite these limitations, the warranted demand can serve as valuable benchmark when assessing development applications as well as formulating Official Plan goals and policies.
- It is impractical to assume retail demand can be accurately forecast to a narrow range beyond a 5 to 10 year period given the rapid pace in which

innovation is occurring with respect to the delivery of retail goods and services. While the analysis examines demand for individual categories, TR would caution against literal interpretations of the demand by category beyond 2031. This is based on the constant evolution of retail trends and changes in the macro economic climate.

- The identified gaps in Clothing & Accessories and Furniture, Home Furnishings & Electronics, as noted previously in this report, should be interpreted primarily as an indication of spending that is leaving Arnprior, rather than as a direct requirement for new stores in these categories. These categories are readily available in larger nearby retail destinations, including Kanata; however, the gaps may support opportunities for smaller, differentiated, or specialty businesses that complement – not replicate – the regional offering.
- Categories such as supermarkets and pharmacies are generally more consistent indicators of future demand because they serve frequent, day-to-day needs. Population growth to 2041 is expected to generate additional warranted space of approximately 11,900 square feet of pharmacies and 13,300 square feet of supermarkets.¹⁰
- Over the longer term, the individual categories mean less than the overall quantum of space warranted. By 2041, there will be an estimated demand for 174,300 square feet of retail commercial space.

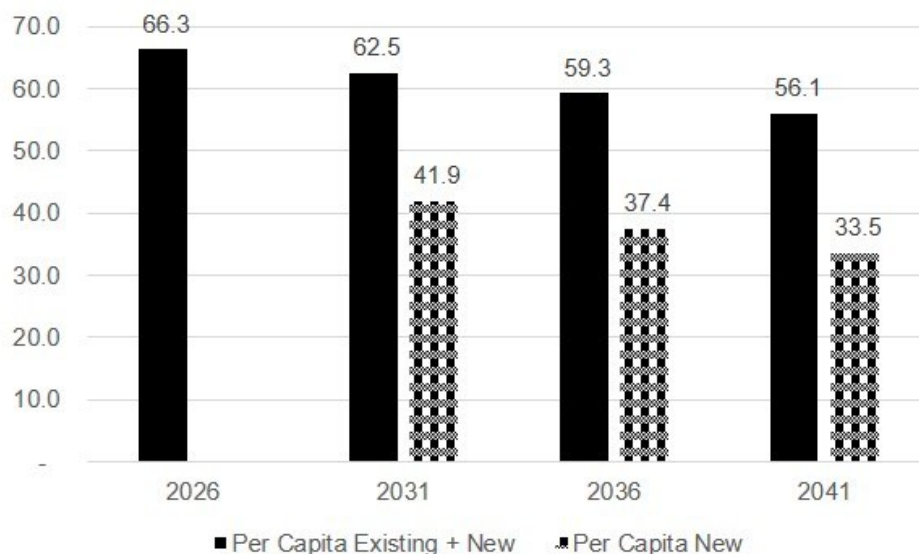
It should be noted that TR has assumed that the future population will require less retail and service space, on a per capita basis, due to the impacts of e-commerce and other market related factors as illustrated in Figure 6-4. The following observations are made with respect to Figure 6-4:

- Currently, there is approximately 66.3 square feet per capita of occupied retail commercial space.
- By 2041, the retail and commercial space per capita is forecast to be 56.1.

¹⁰ It should be noted that the demand analysis assumes no transfers from existing retailers. Therefore, the actual square foot demand number could be higher. Furthermore, the analysis assumes a consistent capture rate across the time horizon. Should a major retailer choose to locate in Arnprior, the capture rate of Arnprior residents' would increase therefore supporting additional space.

- The decrease is a function of the new space which is introduced at a more typical per capita ratio and continues to decrease as a result of e-commerce impacts.

Figure 6-4: Arnprior Retail Commercial Space per Capita (square feet)



Source: Tate Research

Figure 6-5 illustrates the land needs required to accommodate future demand.

Figure 6-5: Arnprior Retail Commercial Future Land Requirements

	2031	2036	2041
<i>Square Feet</i>			
Total Retail & Service	88,000	138,500	174,300
LESS: Development Applications	8,400	8,400	8,400
Total Warranted Demand (net of Dev. Apps)	79,600	130,100	165,900
<i>Acres</i>			
Land Requirements to Accommodate Future Demand			
Land Requirements @20% Coverage (acres)	9.1	14.9	19.0
Land Requirements @25% Coverage (acres)	7.3	12.0	15.2
Land Requirements @30% Coverage (acres)	6.1	10.0	12.7
Vacant Commercially Designated Land	23.1	23.1	23.1
Surplus Vacant Lands to Accommodate Future Demand Post 2041			
Land Requirements @20% Coverage (acres)	14.0	8.2	4.1
Land Requirements @25% Coverage (acres)	15.8	11.1	7.8
Land Requirements @30% Coverage (acres)	17.0	13.1	10.4

Source: Tate Research

The following observations are made with respect to Figure 6-5:

- As summarized in Figure 3-7 there is potential for an additional 8,400 square feet of retail commercial space under construction and in the municipal development process. These lands will serve a portion of future demand.
- Arnprior has approximately 23.1 acres of vacant commercially designated land, which exceeds the theoretical demand for 15.2 acres of commercial land projected to 2041 using the mid point of 25% land coverage. This indicates that there is sufficient vacant commercial land to accommodate future retail and service growth over the planning horizon, assuming appropriate conditions, access, and market interest to build commercial space.
- As noted earlier, while the land needs are sufficient, there may be a requirement for additional lands or redesignations based on individual development applications.

6.5 Future Demand Analysis Summary

Arnprior is forecast to experience population growth to 2041. This growth will be accompanied by demand for additional retail commercial space. In theory, Arnprior should not have any limitation in accommodating future growth due to the availability of commercially designated land both vacant and under utilized for development. The only potential issue would be parcel size for larger developments.

However, there may be challenges associated with ensuring retail commercial space is built due to the current nature of the development environment and the reduced financial returns generated by retail commercial development vis-a-vis other asset classes, such as residential.

7 Retail Commercial Trends

This section of the report contains an overview of potential change agents which are relevant to the retail commercial marketplace within the Town of Arnprior. The identification of these change agents / trends, in addition to their implications on future requirements for retail commercial space, is critical in forming recommendations for the future of retailing in Arnprior.

In this study, a “change agent” can generally be defined as a new or emerging theme (e.g., changing demographics, new technologies, emerging trends) that may have implications for the future of commercial land use planning in Arnprior.

- **Focus on Experience:** Transactional shopping purchases are being made online when it is convenient to the shopper. Therefore, when a consumer goes shopping in a physical store, the expectation is for an “experience” that cannot be replicated online. To attract customers, retail stores are increasingly focusing on providing unique in-store experiences that cannot be replicated online. This includes interactive displays, in-store events, personalized services, and experiential concepts like cafes or pop-up shops within existing stores. The emergence of experiential retail is further bolstered by advances in technology which allow for stores to provide interactive experiences linked to social media platforms such as Instagram and TikTok. In addition, the experience may be fulfilled through unique or constantly changing offerings at retailers and interesting window displays. Good examples of businesses in Arnprior focusing on experiences include The Vintage Crate, and White Pine Books/Café Tilda. Fashion boutiques such as Audrey’s Fashions and A Dash of Fab emphasize curated, personalized styling and a boutique atmosphere that differs from online or big-box shopping.



- **Community Engagement:** Retailers are also engaging with local communities by hosting events, workshops, and collaborations with local artists or brands, creating a more personalized and memorable shopping experience. In Arnprior, key community-oriented events include the Arnprior Market (Sunday Market) on John Street North, which brings together dozens of vendors and supports Downtown businesses, as well as seasonal initiatives led by individual retailers. Many fashion and lifestyle boutiques actively use social media and local influencers to promote new arrivals, events, and in-store experiences.
- On a more localized level, there is a growing resurgence of local, independent retail and services characterized by craft / maker markets, maker spaces, boutiques and specialty food purveyors. These types of stores understand and capitalize on the power of experience and local presence.

7.1 Demographic Shifts

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

- **Older Generations (Baby Boomers and Seniors):** While younger consumers are driving demand for experiential and digitally integrated retail, older generations continue to represent a significant and growing segment of the market. Baby Boomers (born between 1946 and 1964) and seniors typically place a high value on convenience, service, accessibility, and trust in established retailers. Many prefer in-person shopping experiences where they can interact with knowledgeable staff, assess products firsthand, and receive personalized customer service. As Canada's population ages, retailers are adapting by providing more accessible store layouts, convenient parking, comfortable shopping environments, and services such as home delivery and curbside pickup. In communities such as Arnprior, this demographic supports a range of everyday goods and services, including pharmacies, grocery stores, health and wellness retailers, and specialty shops that offer a strong customer-service focus and foster long-term customer relationships.
- **Millennials and Gen Z:** These are younger generations (with Millennials born from 1981 to 1996 and Gen Z from 1997 to 2012) who prioritize experience over products, value sustainability, and are tech-savvy. They

often prefer unique, local, or independent stores that offer personalized experiences. This shift has led to a rise in experiential retail, where shops offer more than just products; they create engaging experiences, such as in-store events, interactive displays, and social media-friendly settings. In Arnprior, this is partially reflected in the success of multi-use, experience-focused spaces and boutiques that emphasize curation, service, and atmosphere.

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

7.2 Tenant Mix Trends

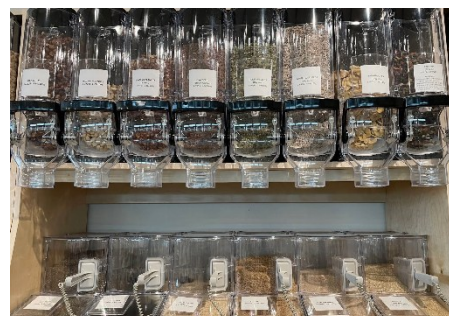
The tenant mix, whether in main streets or strip plazas, is constantly evolving. In the points that follow, TR has provided our assessment of the changes currently being experienced within retail nodes around Ontario.

- **Diverse Dining Options:** Food and beverage outlets, including cafes, casual dining, and fine dining restaurants, have become anchor tenants on main streets and are important components of retail centres. The demand for unique culinary experiences and the growing trend of social dining have driven an increase in both traditional restaurants and innovative food concepts like food halls and pop-up eateries. Arnprior has a notable concentration of high-quality local restaurants and bakeries, which contribute to the Downtown experience and support extended visitation.



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

- **Convenience and Necessity Retailers:** Convenience stores, pharmacies, and other necessity-based retailers remain important tenants, as they provide essential goods and services.
- **Fitness and Wellness Centres:** With increasing awareness of health and wellness, there is a growing number of gyms, yoga studios, pilates centres, and wellness clinics (like acupuncture and massage therapy) on or near main streets. These businesses provide services that are not easily replaced by e-commerce, making them resilient tenants. Arnprior lacks sufficient offerings in these categories.
- **Personal Services:** There is growth in businesses offering personal services, such as hair salons, nail salons, dry cleaners, and tailor shops, which cater to daily needs and are less affected by the shift to online shopping.
- **Health-Oriented Stores:** Retailers specializing in health foods, organic products, supplements, and wellness-related goods are becoming more prominent as they cater to the growing consumer interest in health and well-being. In Arnprior, a store such as Green Bean Natural Foods aligns with this trend, responding to demand for natural and specialty health products.
- **Entertainment & Recreation:** In keeping with the experiential retail trends, entertainment & recreation concepts such as VR, bowling alleys, mini-golf, arcades, game cafes, escape rooms and interactive museums and exhibits are locating on many main streets. Many of the larger concepts are found in retail centres and mixed-use developments which have the size and building configuration suitable for such uses.



7.3 Retail Trends Summary

Many of the tenant mix trends focus on local goods and services. This is primarily based on a need for a more experience-based commercial environment as opposed to transactional.

A broad array of designations permitting retail in various formats and locations to cater to a wide range of retailers is required. In addition, alternative forms of retail (i.e. pop-ups) may require a more permissive policy environment.

Arnprior's current pattern of experience-focused, independent retail in Downtown and convenience / national-chain retail in the highway area, suggests that the Town should support a diversity of retail formats, including multi-use spaces, shared venues, and temporary or pop-up concepts that enhance the Downtown experience.

8 Engagement

This section of the report provides a high-level summary of the engagement conducted for the Arnprior Retail Demand Study. The perspectives presented reflect participants' experiences and do not necessarily reflect the needs of the gap analysis or represent the views of TR or other Arnprior businesses and residents. Detailed findings, full survey tables, and business-owner input are provided in the appendices.

8.1 Engagement Process Overview

The engagement process combined qualitative and quantitative methods to capture perspectives from business owners, residents and visitors. These methods included:

- Business interviews and focus groups: Structured discussions with business owners to understand performance, operating conditions, and perceptions of the commercial environment.
- Online survey: A Town-wide survey distributed via SurveyMonkey, promoted online, through physical cards, and in person at the Arnprior Market. The survey examined where residents and visitors shop, why they travel outside Arnprior, satisfaction with local offerings, and preferences for future businesses. A total of 1,598 resident surveys were completed. Based on Arnprior's 2026 population estimate of approximately 11,500 residents, the survey results have a confidence level exceeding 95% with a margin of error below $\pm 3\%$.

Together, these methods provide a broad view of how Arnprior's commercial areas are used, perceived and where opportunities or constraints exist.

8.2 Business Owners Perspectives

Business owners reported mixed performance. Some businesses have experienced steady growth, often supported by e-commerce strategies developed during the pandemic, while others have seen declining foot traffic and sales in recent years.

Seasonal patterns are pronounced, with the Christmas period and summer tourist season being the strongest, and spring consistently challenging.

A consistent theme was that a high proportion of Downtown customers come from outside Arnprior, with estimates from business owners reaching 70% to 80% in some cases. Many local residents, including long-time Arnprior households, were described as rarely visiting Downtown or being unaware of what it offers.

Key challenges identified by business owners included limited available space in Downtown, tenant mix concerns, competition from highway retail, infrastructure and accessibility, events and evening economy.

8.3 Resident Survey Results

The resident survey provided insight into how Arnprior households use local and regional retail and services. Some main conclusions from the survey included:

- Arnprior retains spending well in essential and service-oriented categories such as pharmacies and medical services.
- Spending leakage is greatest in clothing and accessories, home décor, furniture & electronics and entertainment.
- Residents most commonly shop outside Arnprior in Kanata, Ottawa, and Renfrew, primarily because of better selection and variety, unavailable stores or brands, lower prices and greater convenience.
- Grocery shopping is a notable source of out-of-town trips, mainly for better selection of products, preferred stores, better value, and one-stop shopping.
- Residents would be more likely to visit Downtown if it offered a greater mix of shops, additional events, and improved parking or access.
- There is strong support for a larger big-box store or power centre. There is strong support for a new grocery store.
- Independent and locally owned businesses remain important to Arnprior's Downtown identity.

8.4 Engagement Summary

There is a clear pattern from the engagement process:

- Downtown Arnprior functions as a regional, experience-oriented destination that attracts a majority of its customers from outside the Town,

supported by independent boutiques, specialty retailers, restaurants, and community events such as the Arnprior Market.

- Many residents routinely shop outside Arnprior, particularly for clothing, home furnishings, electronics, and groceries, driven by selection, brand availability, price, and convenience.
- Business owners face a combination of opportunities and constraints, including strong draw from non-local customers, but also challenges related to space availability, tenant mix, competition from highway retail, accessibility, communication with the Town, and the cost of operating and improving properties.
- There is broad interest in enhanced Town-led marketing, events, and coordination, as well as in a more curated mix of uses that supports Downtown as a cohesive, destination retail environment while accommodating growth in the highway commercial node.

9 Implementation Action Plan

The overarching objective of this implementation plan is to strengthen Arnprior's position as both a regional service centre and a destination community. The recommended actions focus on retaining and supporting existing businesses, improving expenditure retention, enhancing visitor attraction, protecting commercial growth opportunities, and ensuring that future population growth is accompanied by a corresponding expansion of retail, service, employment, and tourism activity. By pursuing these actions, Arnprior can continue building upon its existing strengths while positioning itself for sustainable long-term economic growth.

9.1 Short-Term Actions (0-2 Years)

9.1.1 Strengthen Economic Development Capacity

Successful implementation of the recommendations contained in this report will require dedicated leadership and sustained engagement with businesses, developers, property owners, and community stakeholders. The Town should explore opportunities to increase dedicated economic development capacity to support business retention, business attraction, tourism development, stakeholder engagement, and implementation of strategic initiatives. This may include reviewing existing staff responsibilities and identifying opportunities to strengthen the Town's economic development function.

9.1.2 Business Retention and Expansion Program

Existing businesses are the foundation of Arnprior's economy and represent the greatest source of future employment growth. The Town should establish a formal business retention and expansion program consisting of annual business visits, regular business outreach, issue resolution, business intelligence gathering, and connections to provincial and federal funding opportunities. The program should identify emerging business needs before they become barriers to investment while strengthening communication between the Town and the local business community.

9.1.3 Business Collaboration and Networking Program

A consistent finding of the BR+E study was the desire for greater business collaboration and networking between retailers, manufacturers, institutions, tourism operators, and other employers. The Town should support regular networking opportunities including annual Mayor's Business Breakfasts, sector-specific business roundtables, business tours, and employer showcases. These initiatives will strengthen local relationships, encourage partnerships, improve local supply chains, and foster a stronger business community.

9.1.4 Downtown Marketing Program

Downtown Arnprior serves an important role as the Town's primary destination-oriented commercial district. The Town should work with businesses to develop a coordinated marketing program promoting Downtown Arnprior as a unique shopping, dining, cultural, and visitor destination. Activities should include social media campaigns, business profiles, event promotion, visitor guides, newcomer information packages, and coordinated branding that highlights the character and uniqueness of downtown businesses.

9.1.5 Improve Cross-Shopping Between Commercial Nodes

The retail commercial structure of Arnprior benefits from two complementary commercial nodes: Downtown Arnprior and the Highway Commercial node. Mobility analysis indicates that relatively little cross-shopping currently occurs between these nodes. The Town should support initiatives that encourage visitors to experience both commercial areas during a single trip through wayfinding signage, coordinated promotions, shared events, and cross-marketing initiatives. Increasing cross-shopping will strengthen local expenditure retention and expand the benefits of visitor spending across a broader range of businesses.

9.1.6 Arnprior Market Enhancement Program

The Arnprior Market already serves as one of the Town's most successful visitor-generating activities and contributes significantly to Downtown vitality. Continued investment in programming, marketing, vendor recruitment, and operational improvements should be pursued. Future enhancements should focus on increasing visitor attendance, improving integration with nearby businesses, and positioning the market as a regional attraction that complements Downtown retail activity.

9.1.7 Tourism Development and Visitor Retention Strategy

Tourism represents a significant opportunity for commercial growth. Arnprior possesses numerous tourism assets including its historic downtown, waterfront, trails, beaches, events, airport, museum, and recreational facilities. The Town should prepare a tourism development strategy that builds upon these strengths while increasing visitor frequency, length of stay, and visitor expenditures. Particular emphasis should be placed on attracting day-trip visitors from Ottawa and encouraging stronger connections between tourism activities and local businesses.

9.2 Medium-Term Actions (3-5 Years)

9.2.1 Economic Development Governance Model

The BR+E Study identified the need for stronger economic development leadership, improved communication, greater networking opportunities, and enhanced collaboration between local businesses, major employers, tourism operators, and the Town. These themes were reinforced through this Retail Demand Study's business focus groups and resident survey, which highlighted a desire for stronger downtown coordination, business promotion, tourism development, and economic development leadership.

Over the medium term, the Town should evaluate governance models that can effectively support business development, downtown revitalization, tourism promotion, stakeholder coordination, and economic development implementation. Any future governance structure should be developed through a collaborative process that reflects the needs and priorities of the local business community.

Importantly, approximately two-thirds of the businesses that responded to the on-line survey established operations after the former Business Improvement Area (BIA) became dormant in 2014. As a result, many current business owners have limited familiarity with the role, responsibilities, benefits, and challenges associated with organizations such as a BIA, Downtown Association, or similar governance structures.

Prior to considering the establishment of any formal organization, the Town should commission a Capacity Building Study to educate and engage businesses regarding the various governance options available. The study should examine successful examples from comparable communities, identify the advantages and

disadvantages of alternative governance structures, evaluate local capacity and willingness to participate, and establish a roadmap for implementation should there be sufficient support from the business community.

Any future governance model should focus on:

- Business attraction and investment promotion;
- Business retention and expansion;
- Tourism marketing and destination development;
- Downtown revitalization and beautification;
- Business networking and stakeholder collaboration;
- Event programming and promotion; and,
- Implementation of economic development initiatives and strategic priorities.

The ultimate objective should be to establish a sustainable governance structure that provides dedicated leadership and coordination, while complementing the Town's economic development efforts and supporting the long-term vitality of Arnprior's business community.

9.2.2 Review and Modernize the Community Improvement Plan (CIP):

Undertake a comprehensive review of the CIP to improve program effectiveness and business uptake. Priority should be placed on simplifying application requirements, reducing administrative burden, improving program awareness, and aligning incentives with current investment and economic development priorities. In addition, new incentives such as patio fee refunds should be considered. Consider reallocating resources toward initiatives that support business attraction, downtown revitalization, tourism development, and broader community-building objectives where traditional grant programs have demonstrated limited uptake.

9.2.3 Targeted Tenant Recruitment Strategy

The quantitative gap analysis identified opportunities in Clothing & Accessories and Furniture, Home Furnishings & Electronics. Future recruitment efforts by the Economic Development department should focus on retail and service categories that complement the existing commercial offering rather than duplicate businesses already present. Priority should be given to specialty retailers, restaurants, experiential retail concepts, recreation uses, wellness providers, and destination-oriented businesses that strengthen Arnprior's identity and improve expenditure retention. It should be noted that the recruitment strategies for

national chain retailers and local independent retailers differ. For national chain retailers the focus should be on data. Appendix D includes resources for what national chains look for when making a location decision. The data includes Trade Area expenditures, mobility data and site selection attributes. The Economic Development department should create a dashboard with the relevant information.

For downtown local businesses, the process is more involved and requires identification of the specific operator for example in a neighbouring municipality and have a package ready ideally in cooperation with landlord looking to lease vacant space. Consideration should also be given to creating a process in which landlords can confidentially let the Economic Development department know when a lease is not being renewed.

It is important to note that tenant recruitment is generally difficult. Unless the Town and developers / land lords are in alignment, the Town generally cannot directly control private tenant selection where proposed uses comply with zoning.

9.2.4 Workforce Attraction and Retention Strategy

Employers consistently identified workforce recruitment and retention as an emerging challenge. The Town should work with employers, employment agencies, educational institutions, housing providers, and regional partners to support labour force attraction and retention. Areas of focus should include workforce marketing, new employee welcome programs, housing affordability, workforce training, and improved awareness of employment opportunities within Arnprior.

9.2.5 Event and Programming Expansion

Events were repeatedly identified as a key factor supporting visitor attraction, community vibrancy, and business success. The Town should continue expanding and diversifying its calendar of events including markets, cultural programming, festivals, recreational events, tourism activities, and evening programming. Event planning should be coordinated to maximize commercial benefits and encourage visitor spending throughout the community.

9.3 Long-Term Actions (5+ Years)

9.3.1 Highway Commercial Node Build-Out

The Highway Commercial node and to a lesser extent the Madawaska Blvd. node represents Arnprior's primary opportunity for accommodating future large-format commercial development. Future growth should reinforce the area's role as the Town's principal convenience and destination retail node while maintaining its complementary relationship with Downtown Arnprior. Development should emphasize quality design, connectivity, accessibility, and opportunities for future retail and service growth.

9.3.2 Commercial Land Strategy

The commercial land analysis determined that Arnprior has sufficient commercially designated lands to accommodate future retail and service growth through 2041. Commercial land conversion requests should be evaluated in consideration of the long-term commercial land needs identified through this study. Consideration should be given to land extensive uses that may require land use conversions such as grocery and discount department as these uses would serve to stem the outflow of expenditures to other communities.

9.3.3 Strategic Commercial and Employment Growth

Over the longer term, the Town should continue pursuing strategic opportunities to attract retail, office, industrial, institutional, tourism, and employment-generating investments. Particular focus should be placed on opportunities that strengthen Arnprior's role as a regional service centre while supporting local employment growth, increasing daytime population, and improving expenditure retention. Potential opportunities include tourism-related development, office-based employment, technology industries, healthcare-related growth, and strategic commercial investments. These uses will ultimately continue to support Arnprior's local retail commercial hierarchy.

9.3.4 Downtown Intensification Strategy

Long-term downtown vitality will depend upon a growing residential population living within walking distance of local businesses and services. The Town should continue supporting mixed-use development, residential intensification, adaptive reuse, upper-floor residential conversions, and redevelopment opportunities within the downtown area. Additional residential density will strengthen demand for local businesses, support extended business hours, and reinforce Downtown Arnprior's role as the civic and commercial heart of the community.

Appendix A – Customer Draw & Cross Shopping

This Appendix details the mobility data used as input into parts of the analysis.

Mobility Data is anonymized location data sourced from Azira, a third party platform which aggregates signals from opted-in third party smartphone apps. For each device recorded at the location, the program identifies its Common Evening Location (CEL), the area where the device is most frequently observed during evening hours. CEL data Serves as a proxy for place of residence allowing us to understand where customers travel from. All devices are represented by an anonymized ID; no personal information is collected or used. The resulting dataset was then mapped to delineate the customer trade areas to understand the draw of each location.

The data used was from a one-year period, from August 1, 2025 - August 1, 2026. In this report, TR examined two areas in Arnprior to establish their customer draw:

- Several blocks in Arnprior's Downtown.
- Several locations within the Highway Commercial node including the plaza with No Frills and LCBO, and the Arnprior Shopping Centre.

TR also examined the cross shopping between the two nodes over the same time period:

- Of the visitors to the Highway Commercial node, 18% of those visitors also visited the Downtown. That means that 82% of visitors to the Highway Commercial node did not go to the Downtown.
- Of the visitors to the Downtown, 31% of those visitors also visited the Highway Commercial node.

Appendix B – Online Survey Summary

An Arnprior Retail Survey was conducted by TR using an online SurveyMonkey questionnaire. The survey was promoted by the Town on its website, through its social media channels and in Town facilities. In addition, physical cards with QR codes were distributed in Arnprior while conducting the inventory. TR also attended the Arnprior Market on August 9, 2026 to promote the survey and provide paper copies to those that did not want to complete the survey on-line.

The survey examined residents, visitor and businesses' use of and perception of Arnprior's commercial offering, including where and why respondents shop outside the Town, the share of spending retained locally, grocery and non-food shopping behaviour, downtown visitation, support for larger-format retail, and the types of retailers and services respondents would like to see added.



The survey received close to 1,600 responses, including a separate business-focused component, with approximately 90 local business owners responding to questions about business performance, sustainability, and future needs.

The following summarizes the main conclusions that can be drawn from the Arnprior Retail Survey:

- **Spending locally:** Residents report the lowest share of local spending in Clothing & Accessories, Home Décor, Furniture & Electronics and Entertainment where only about 4-9% of respondents spend more than 75% of their monthly expenditure in Arnprior. By contrast, Pharmacy and Grocery show much higher local retention, with 56% and 41% of respondents, respectively, spending more than 75% of their monthly expenditure locally. For services, Medical and Personal Care have the highest local retention with about 35% of respondents spending more than 75% locally.

- **Where people shop outside Arnprior:** The most frequently cited destinations for non-local shopping are Kanata (88%), Renfrew (58%) and Ottawa (48%).
- **Why residents shop outside Arnprior (non food):** The dominant reasons are better selection or variety (78%), the specific store or brand I want is not available in Arnprior (69%), and better prices (47%). Convenience factors such as I combine with other trips or errands (40%) and longer or more convenient opening hours (36%) also play a significant role.
- **Grocery shopping outside Arnprior:** About 50% of respondents report regularly travelling outside Arnprior for groceries. Among those who do, the main drivers are better selection / variety (75%), specific store (Walmart, Food Basics, etc.) (58%), better prices / value (51%) or the appeal of one large store for everything (38%). Only about 13% of respondents feel that their grocery needs are currently met very well within Arnprior, with 12% reporting they are met poorly.
- **Attitude toward big-box or power centre development:** A clear majority of respondents are supportive of a larger big-box store or power centre locating in Arnprior, with about 58% strongly supporting and 19% somewhat supporting such development. Around 9% are neutral, while roughly 15% are somewhat or strongly opposed.
- **Downtown visitation and desired improvements:** The most frequently cited improvements that would bring people Downtown more often are more shops or a better mix of stores (56%), later or more consistent opening hours (44%), more things to do in the evening (33%), better parking or easier access (28%) and more events, markets or festivals (27%).

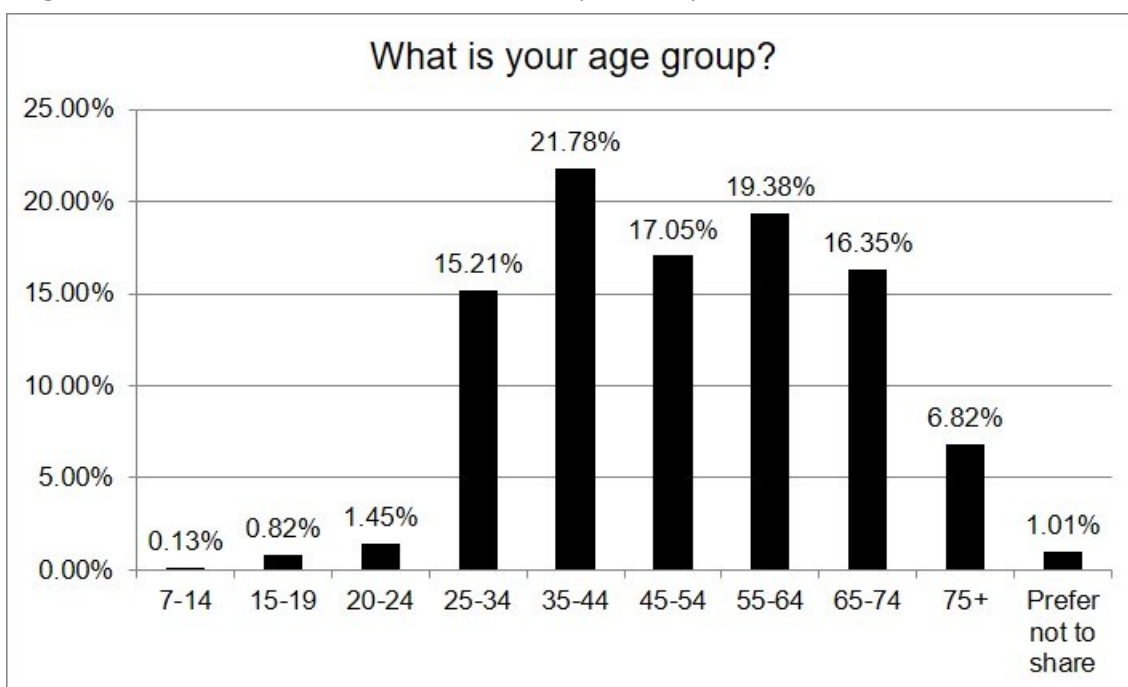
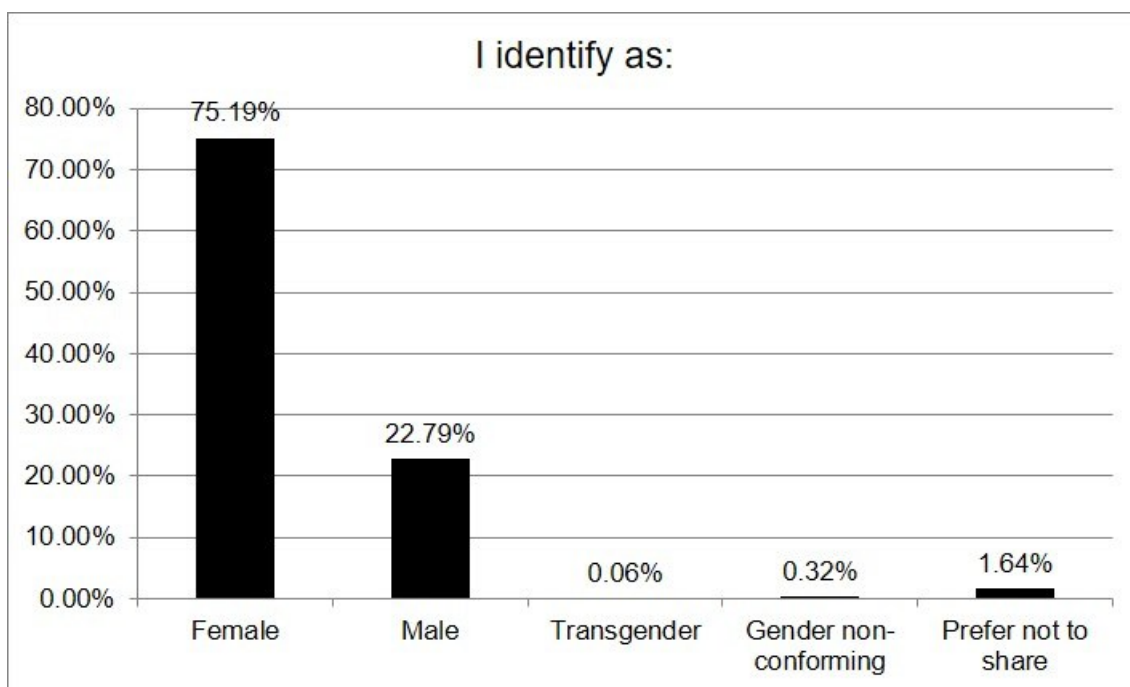
Figure B-1: Respondent Characteristics (n=1,584)**Figure B-2: Respondent Characteristics (n=1,584)**

Figure B-3: Respondent Characteristics (n=1,584)

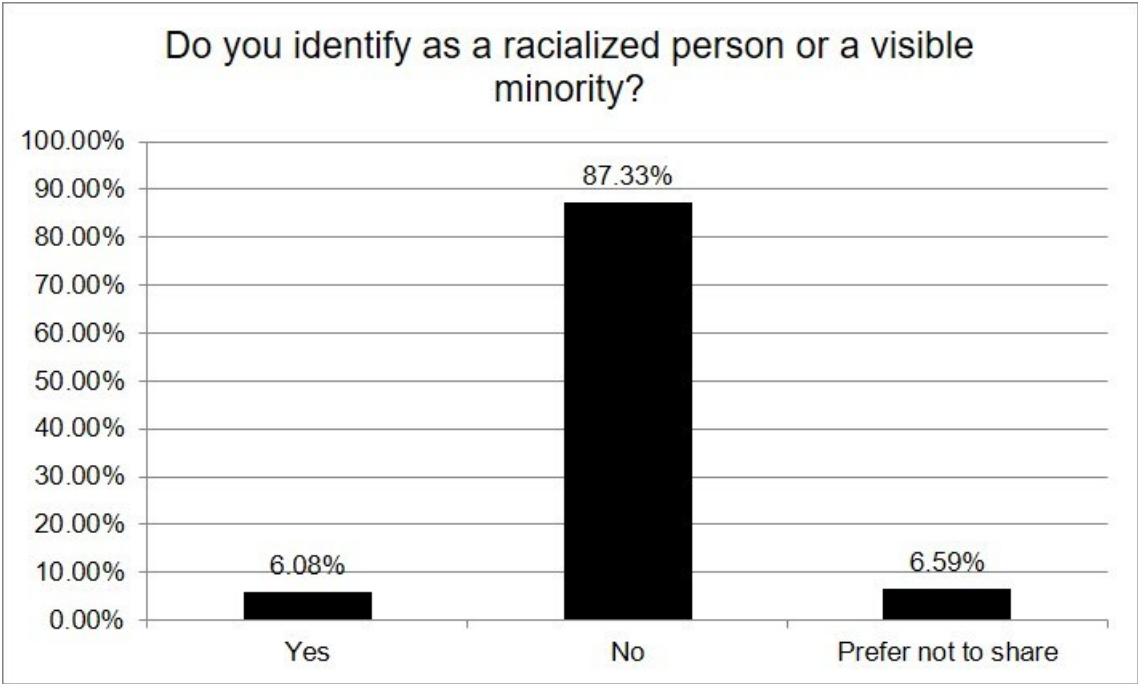


Figure B-4: Respondent Characteristics (n= 1,578)

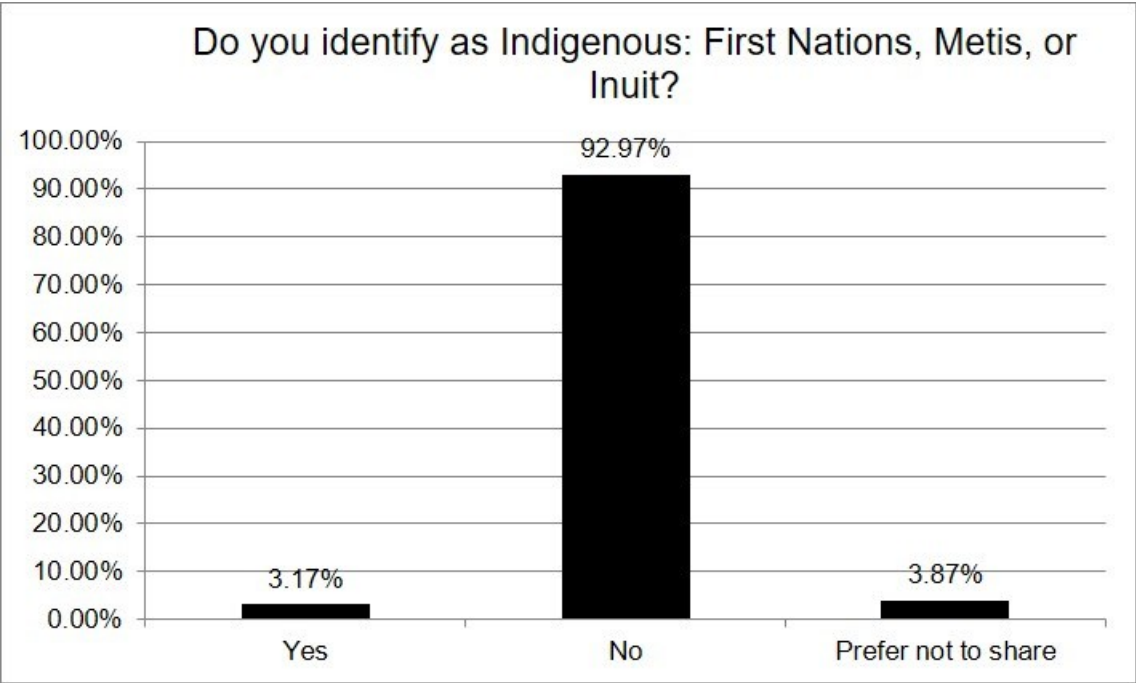


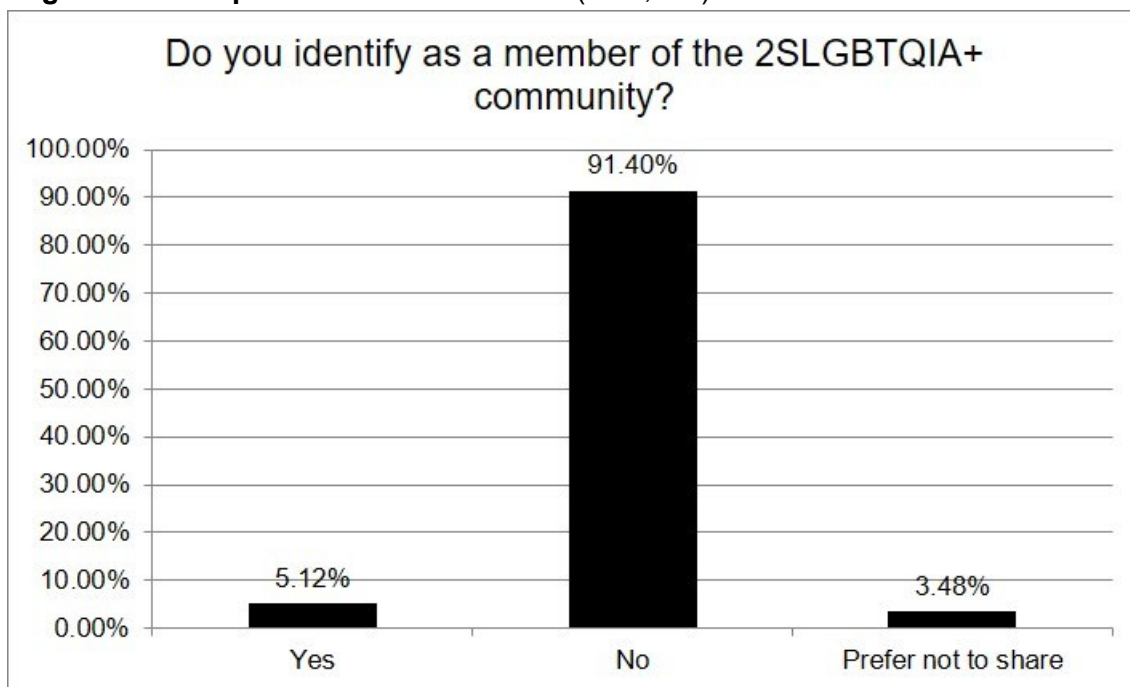
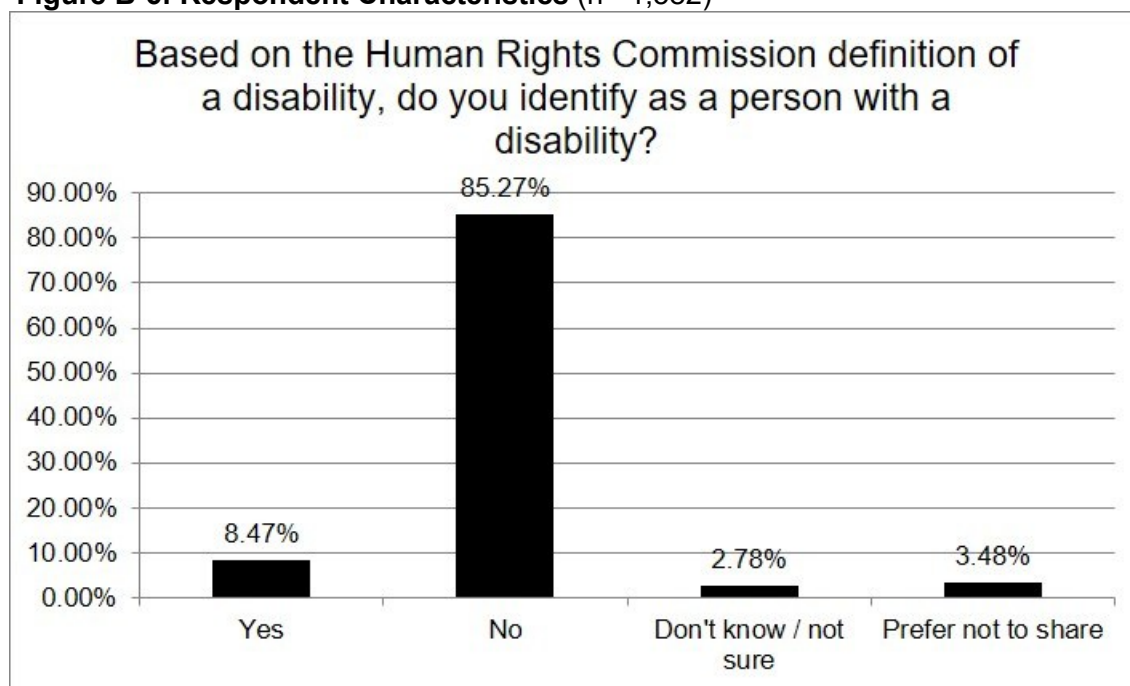
Figure B-5: Respondent Characteristics (n= 1,581)**Figure B-6: Respondent Characteristics (n= 1,582)**

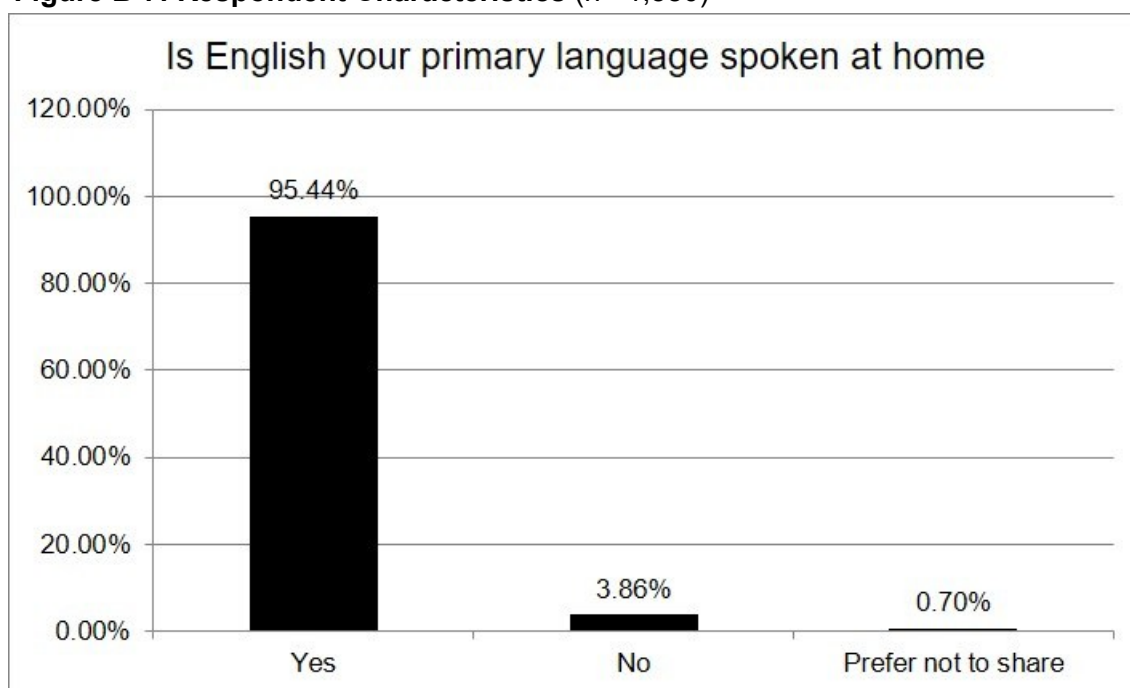
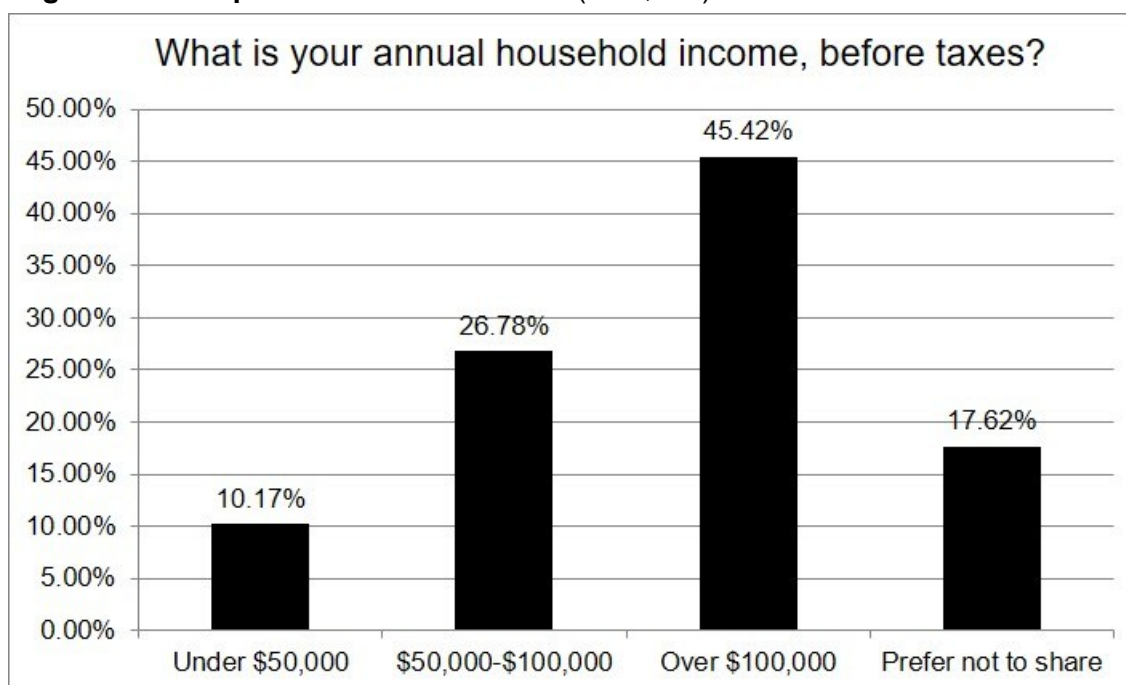
Figure B-7: Respondent Characteristics (n= 1,580)**Figure B-8: Respondent Characteristics (n= 1,583)**

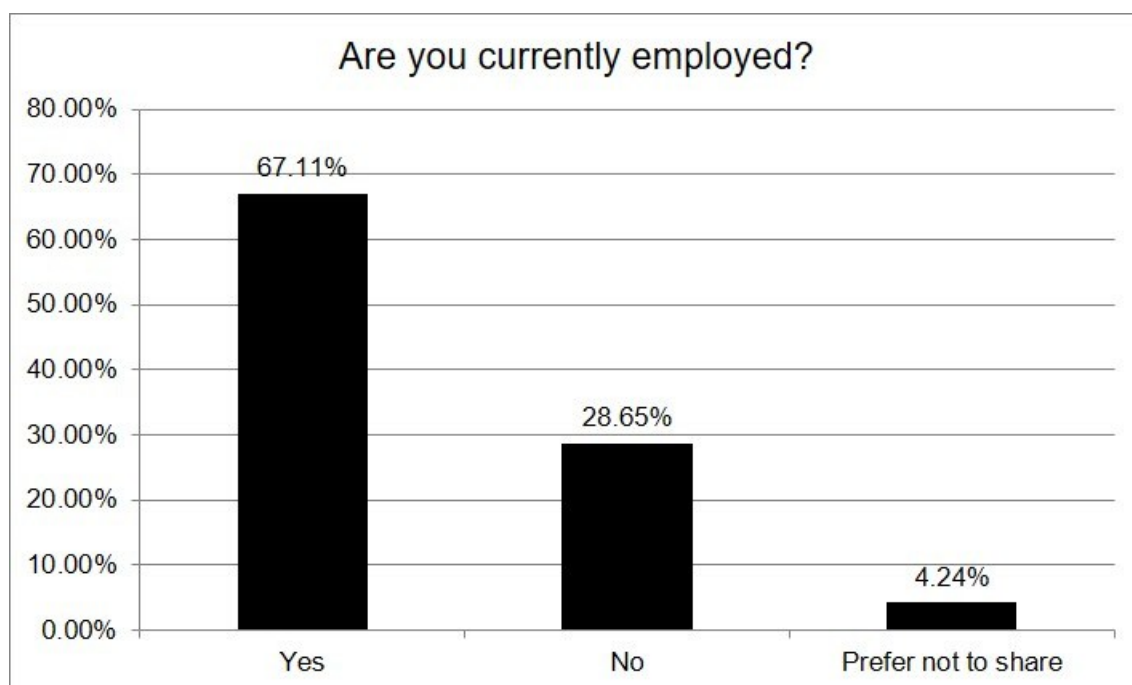
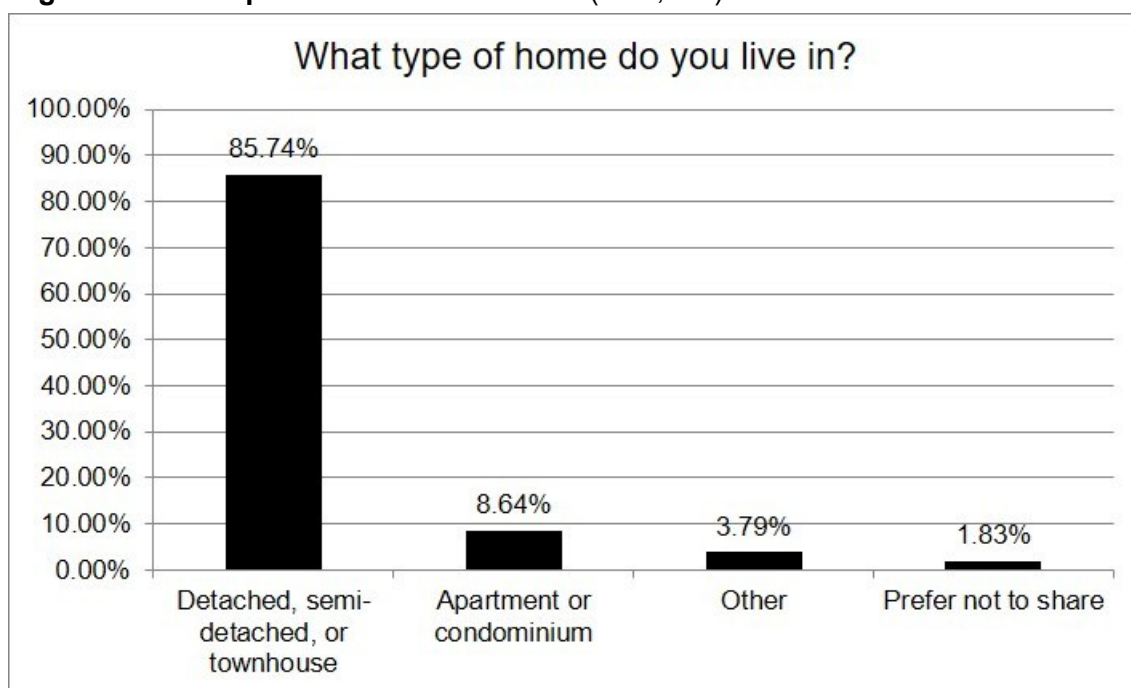
Figure B-9: Respondent Characteristics (n= 1,581)**Figure B-10: Respondent Characteristics (n= 1,585)**

Figure B-11: Respondent Characteristics (n=168)

Please enter any other information you would like us to know about your identity.		
Theme	Approx. Frequency	Key Details
Retired / Seniors	~50	Retired, senior, fixed income, retired professionals
Family Status	~25	Married, single, parents, young families, stay-at-home parents
Occupation / Business Owner	~15	Retail owners, teachers, self-employed, volunteers
Long-time Arnprior Resident	~12	Born and raised, lifelong resident, hometown connections
Ethnicity / Religion / Nationality	~12	Brazilian, South Asian, Jewish, Christian, Francophone, etc.
Objections to Identity Questions	~10-12	Privacy concerns, relevance questioned
Rural / Surrounding Area Residents	~10	McNab-Braeside, Horton, White Lake, Pakenham
Disability / Accessibility	~8	Veterans, mobility issues, disabilities
Newcomers	~6	New residents and those moving to Arnprior
Financial Challenges	~5	Fixed income, affordability concerns

Key Takeaway: Respondents most commonly identified themselves by age/life stage (retired/senior), family situation, local roots, or occupation. A noticeable minority objected to identity-related questions altogether.

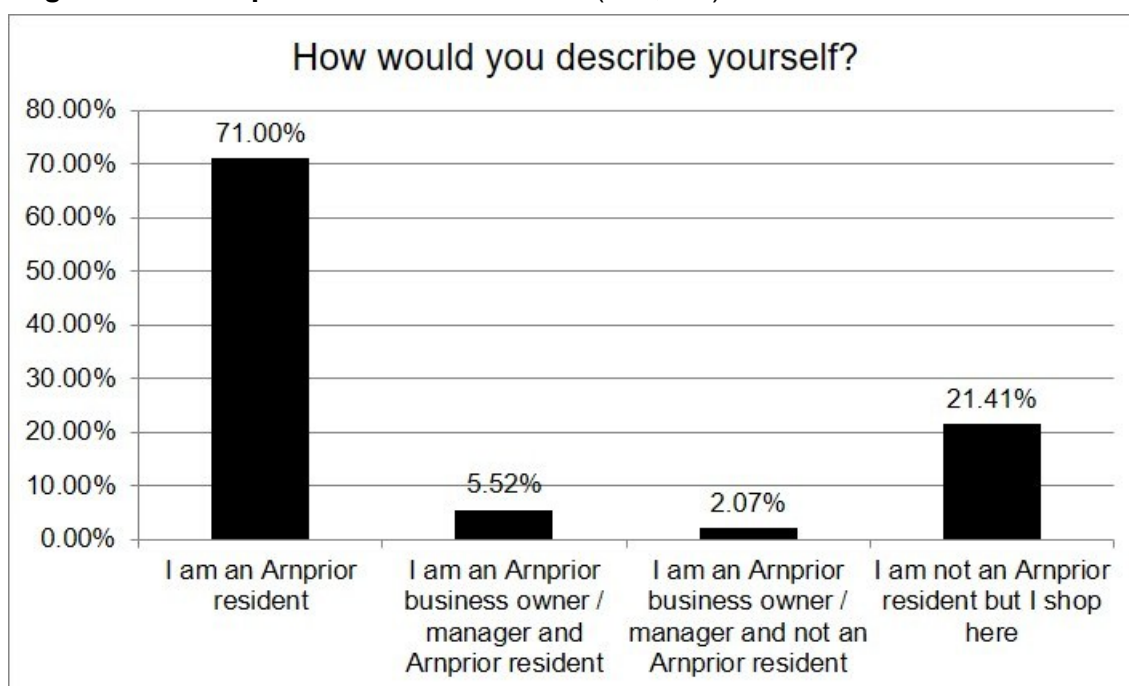
Figure B-12: Respondent Characteristics (n=1,593)

Figure B-13: Business Owner Responses (n=89)

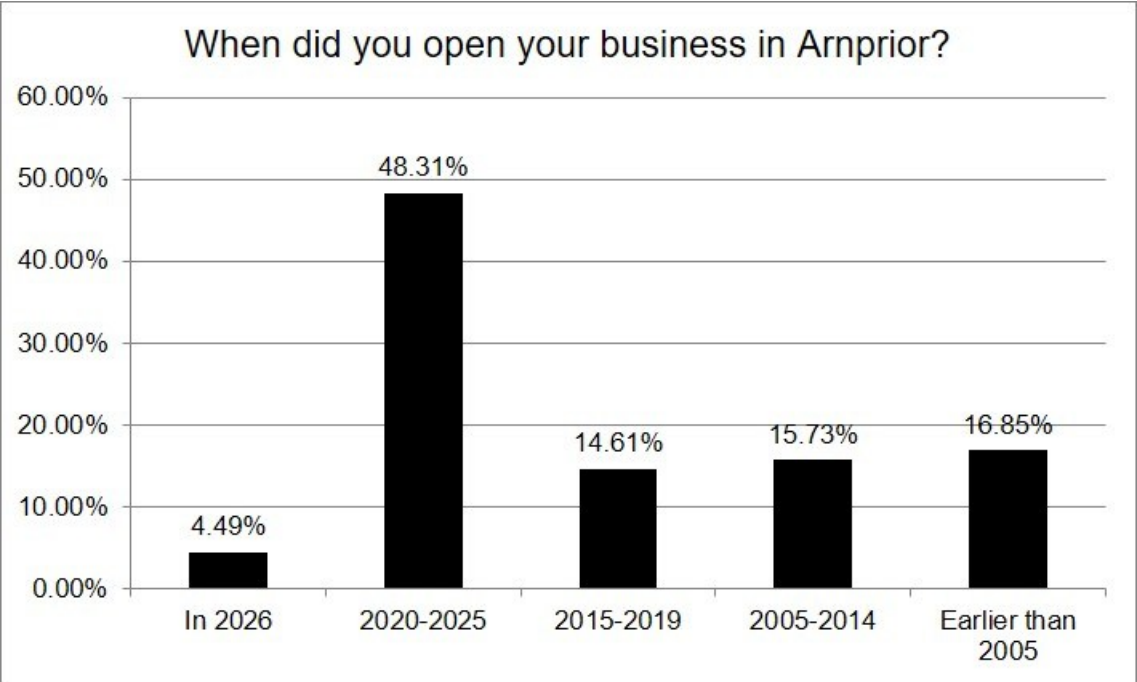


Figure B-14: Business Owner Responses (n=89)

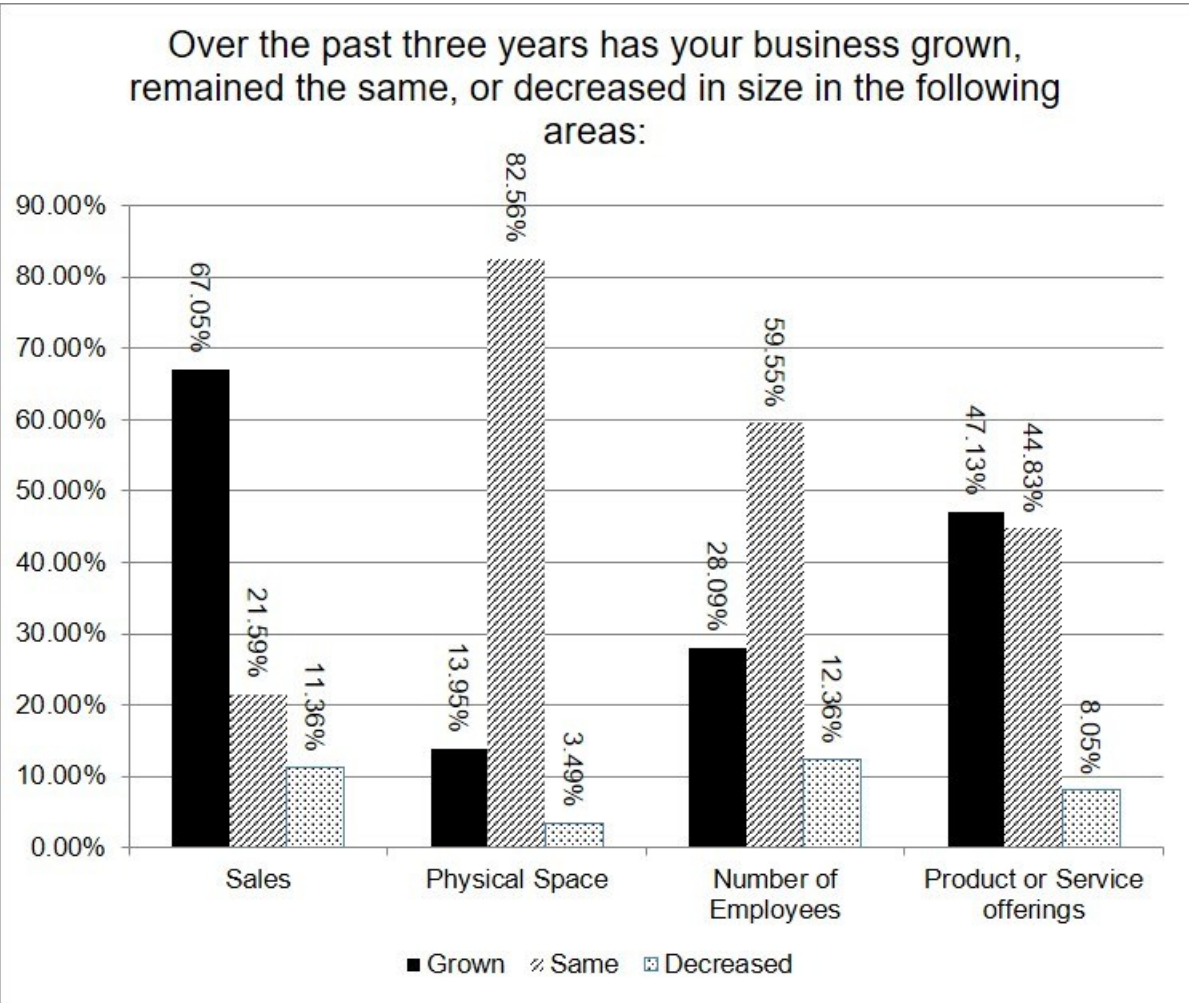


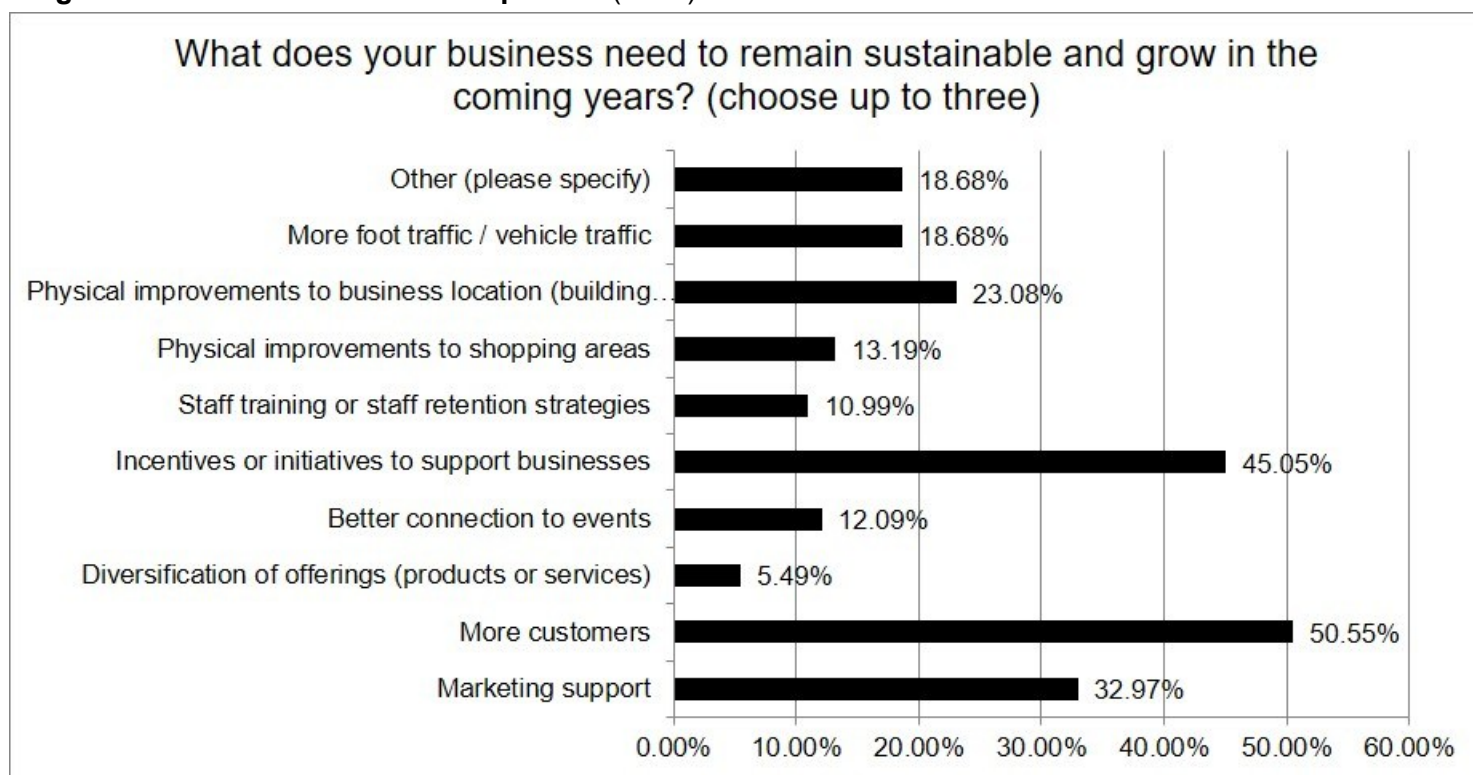
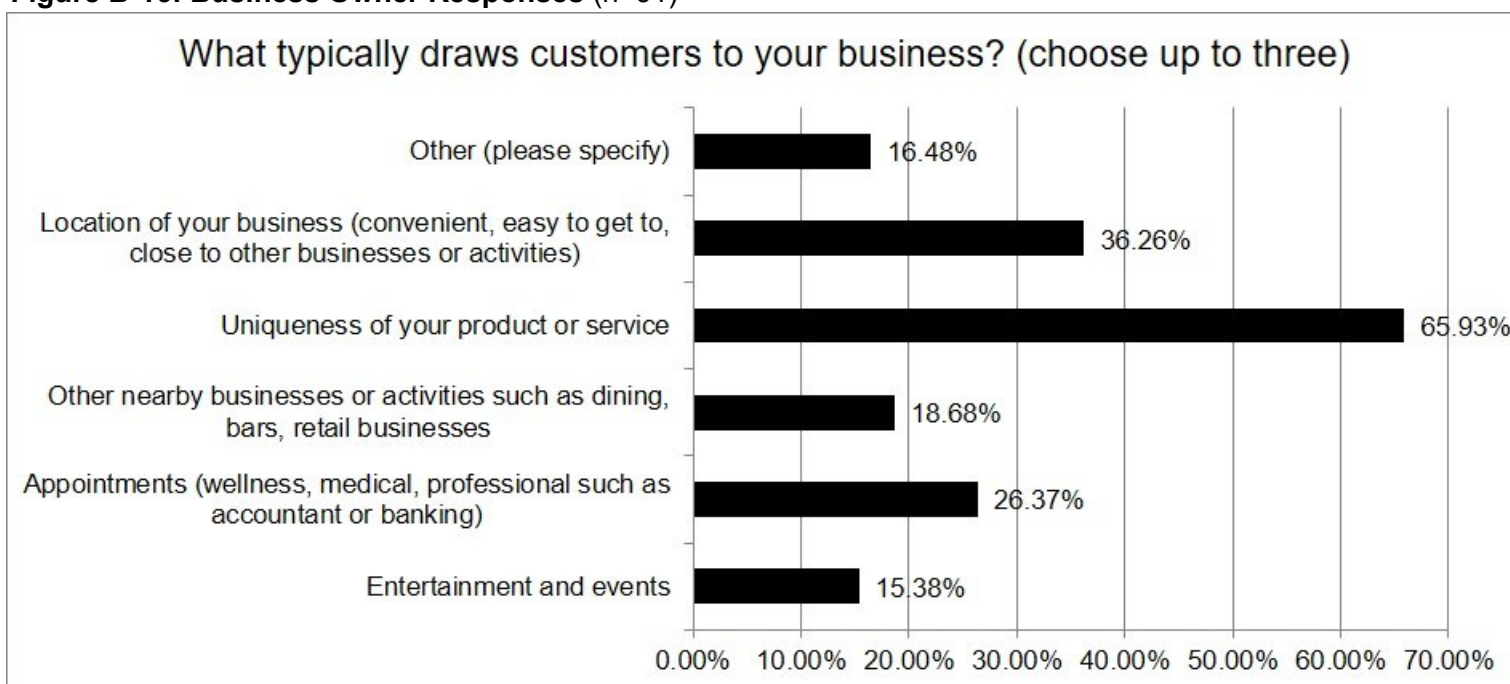
Figure B-15: Business Owner Responses (n=91)**Figure B-16: Business Owner Responses (n=91)**

Figure B-17: Business Owners Responses (n=49)

What attributes or investments would ensure your business remains viable?		
Theme	Approx. Frequency	Key Details
Growth & Infrastructure	~13	New commercial space, infrastructure upgrades, more homes
Marketing & Tourism Promotion	~11	Tourism marketing, ads, events, downtown promotion
Lower Costs / Taxes / Rent	~9	Property taxes, rent control, incentives, grants
Parking Improvements	~5	More parking, improved access, remove levy
Business-Friendly Policies	~5	Reduced bureaucracy, flexible zoning
Downtown Revitalization	~3	Better storefronts, cleaner downtown
Community Support	~2	Local shopping and community support

Key Takeaway: Business owners primarily want stronger economic growth, tourism promotion, lower costs, and additional commercial development.

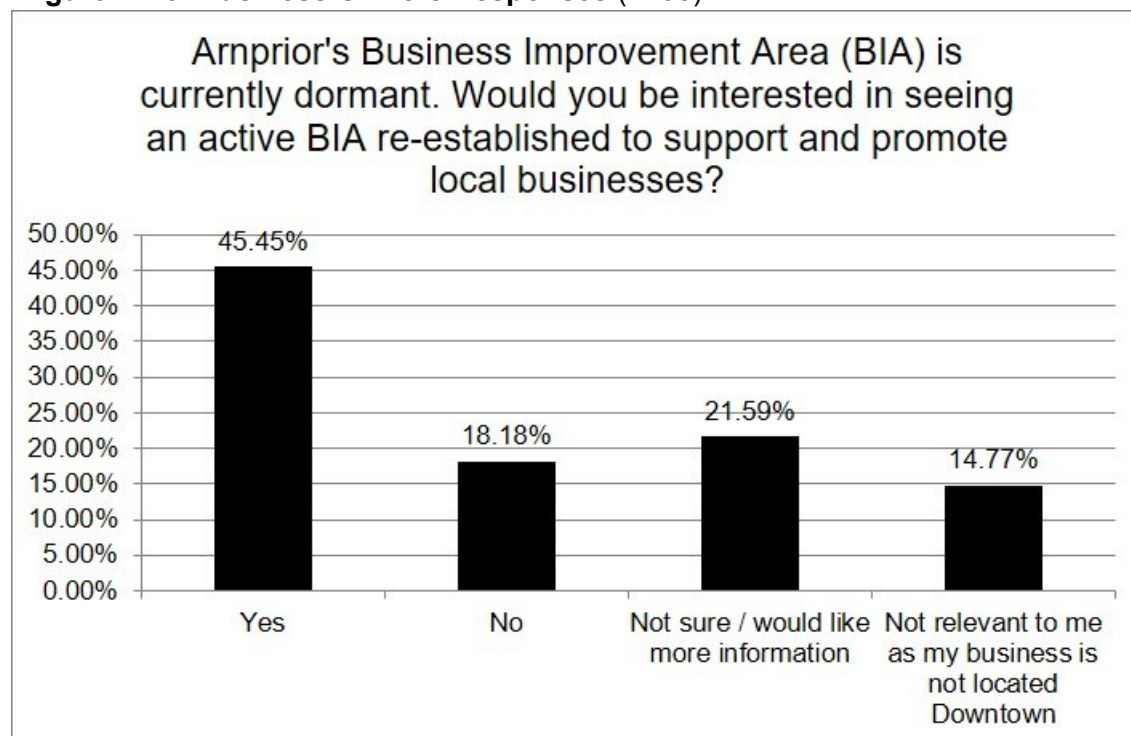
Figure B-18: Business Owners Responses (n=88)

Figure B-19: Shopping Characteristics

For the following categories of retail businesses please estimate how much of your monthly expenditures occurs within Arnprior (n= 1,450)

	Less than 25%	25% - 49%	50% - 75%	Greater than 75%
Grocery	13.81%	19.71%	25.61%	40.87%
Home Improvement	35.61%	21.89%	20.34%	22.17%
Clothing & Accessories	66.50%	17.73%	9.77%	6.00%
Home Decor, Furniture and Electronics	75.89%	13.49%	7.06%	3.56%
General Merchandise (i.e. Dollarama, Giant Tiger, Canadian Tire)	19.33%	25.92%	27.10%	27.65%
Pharmacy	20.40%	11.63%	11.84%	56.13%

For the following categories of service businesses please estimate how much of your annual expenditures occurs within Arnprior (n=1,451)

	Less than 25%	25% - 49%	50% - 75%	Greater than 75%
Personal Care (i.e. hair, nails etc.)	35.88%	13.91%	14.67%	35.54%
Medical (Doctors, Dentist, Physiotherapist)	34.82%	14.66%	15.36%	35.16%
Restaurants: Dine in / Sit down restaurants	25.54%	25.68%	29.42%	19.36%
Restaurants: Fast food	31.35%	18.86%	25.53%	24.26%
Entertainment (i.e. Family entertainment, bowling, sports, movies)	57.72%	20.55%	12.37%	9.36%

What percentage of your monthly food and non-food expenditures are made online and delivered to your home? (Grocery, Amazon, Meal Delivery) (n= 1,441)

	Less than 25%	25-49%	50-75%	Greater than 75%
Food (Grocery, Meal Delivery)	78.73%	10.28%	6.48%	4.51%
Non-food Items	37.19%	28.64%	22.68%	11.49%

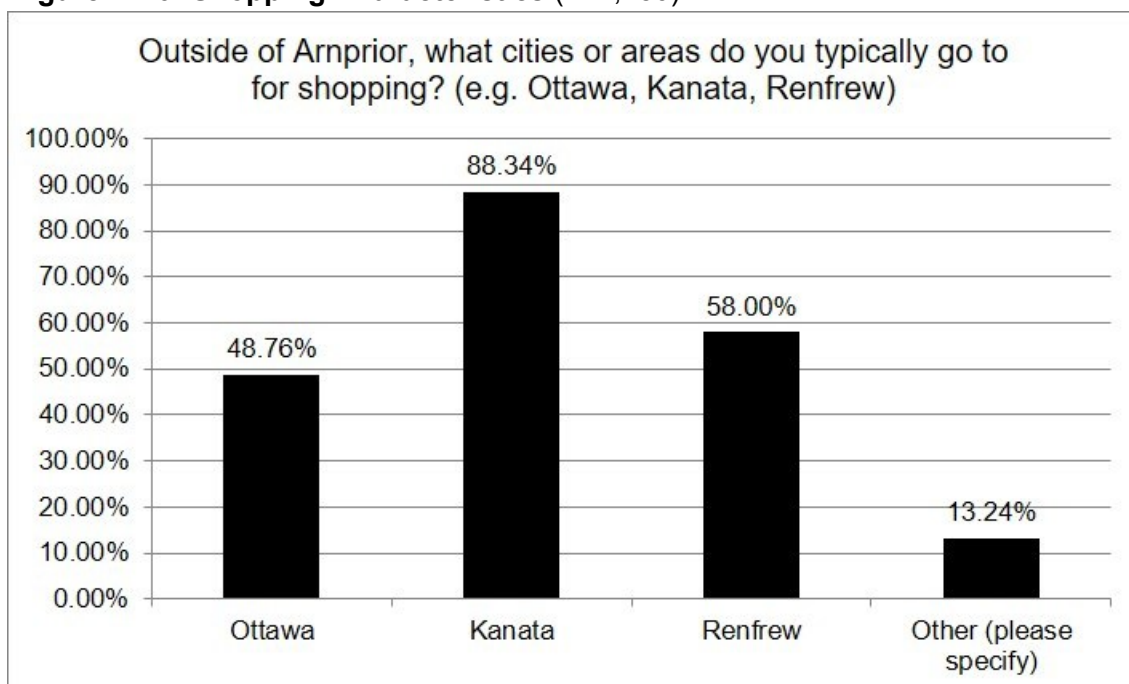
Figure B-20: Shopping Characteristics (n=1,450)

Figure B-21: Shopping Characteristics (n=1,235)

What goods and services do you purchase outside Arnprior?		
Theme	Approx. Frequency	Key Details
Clothing & Footwear	Very High	Family clothing, shoes, specialty sizes
Groceries & Food	Very High	Produce, meat, specialty foods, ethnic foods
Costco / Bulk Purchases	High	Household goods, bulk food, consumables
Home Goods & Décor	High	Furniture, housewares, décor
Home Improvement	High	Lumber, hardware, renovation supplies
Restaurants & Entertainment	Moderate	Dining, movies, concerts
Electronics	Moderate	Computers, electronics, gaming
Medical & Personal Services	Moderate	Doctors, optometrists, specialists
Children's Items	Moderate	Toys, baby products, kids clothing
Sporting / Hobby Goods	Moderate	Sports equipment, crafts, books

Key Takeaway: Retail leakage is driven overwhelmingly by clothing, groceries, home products, and large-format retailers such as Costco and Walmart.

Figure B-22: Shopping Characteristics (n=1,442)

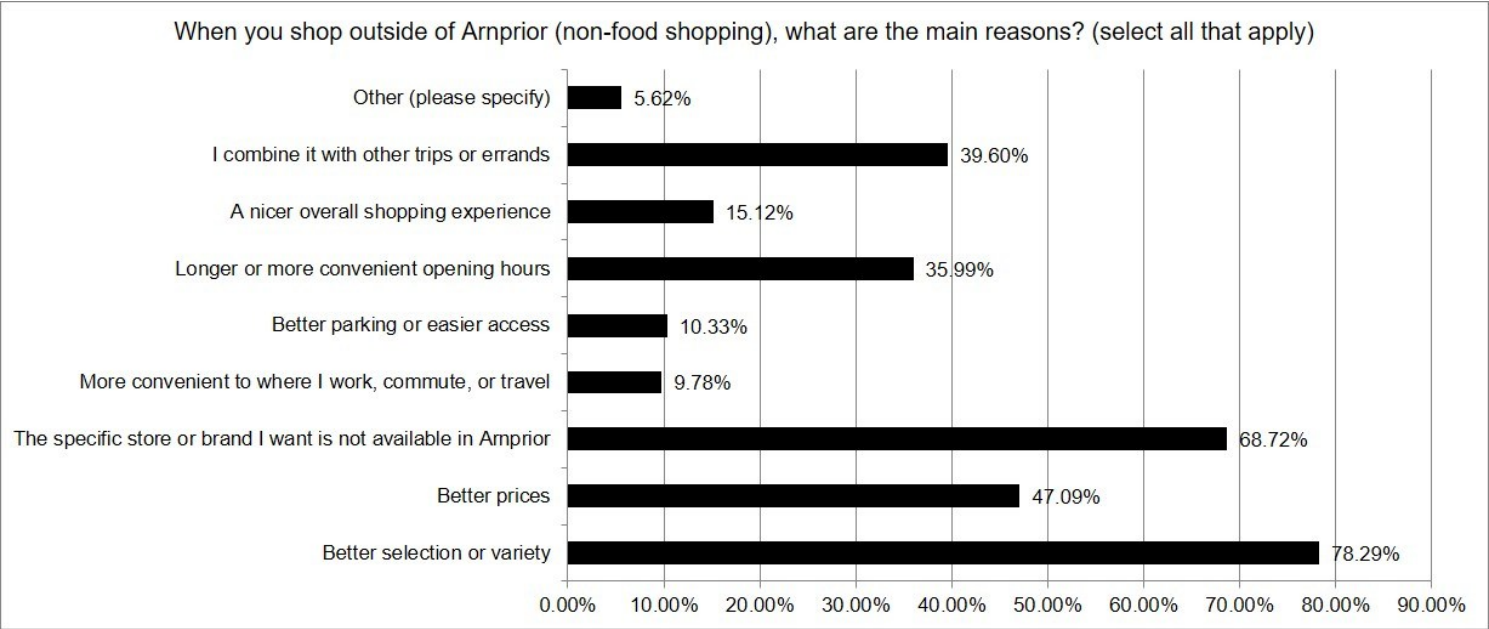


Figure B-23: Shopping Characteristics (n=1,431)

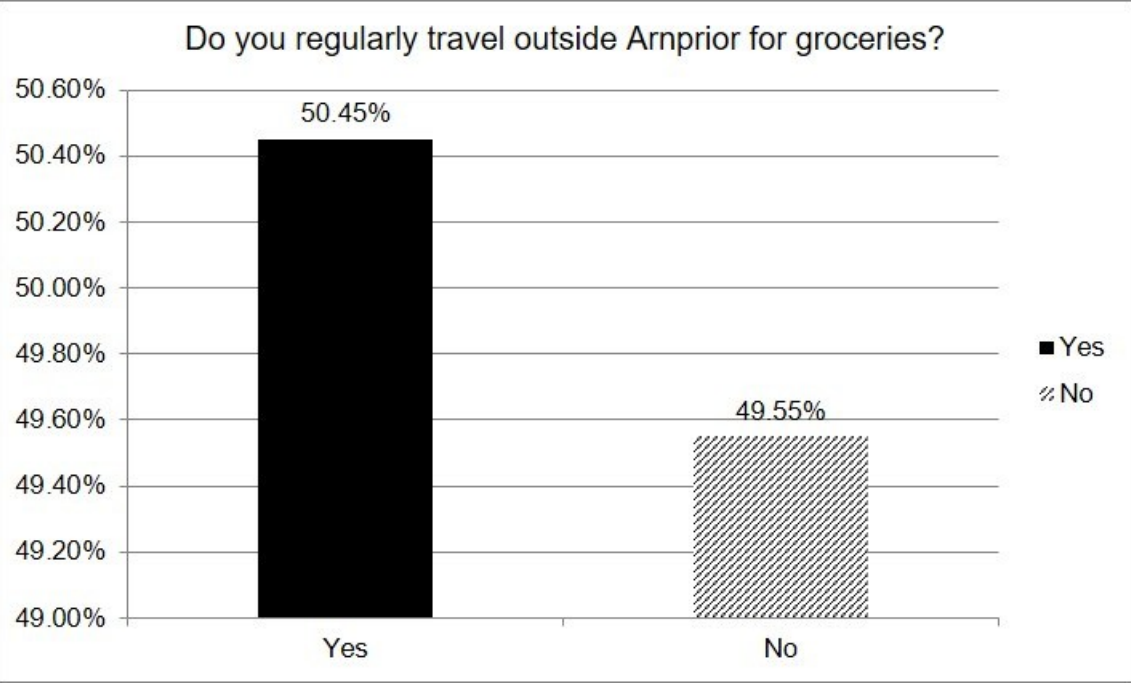


Figure B-24: Shopping Characteristics (n=1,430)

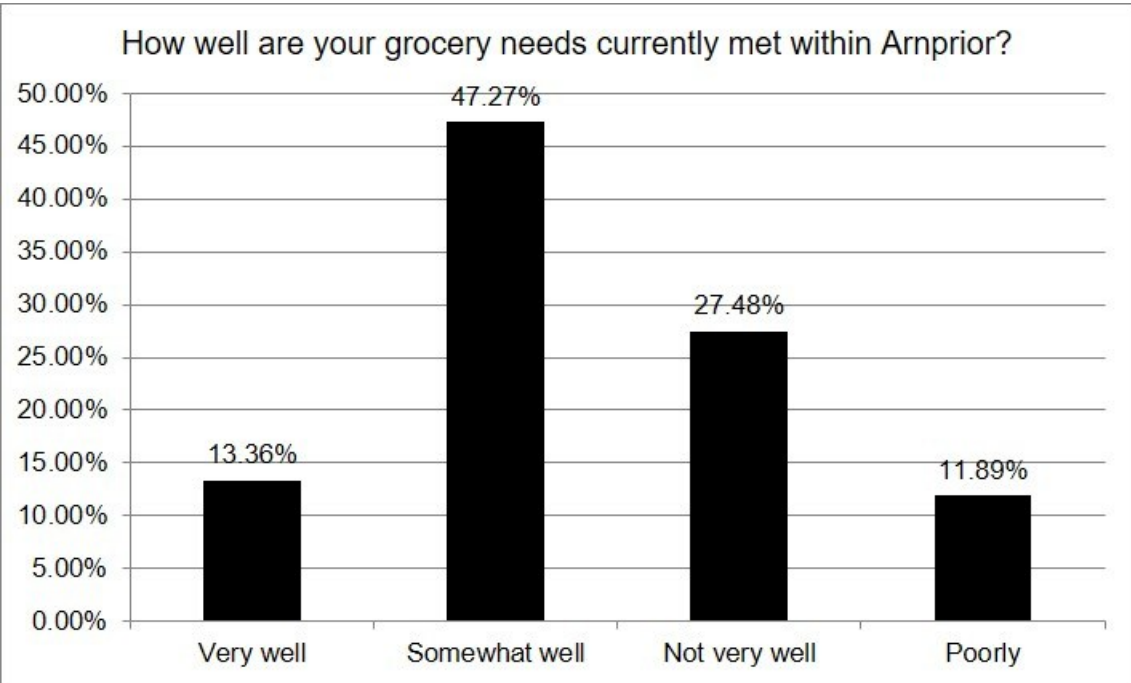


Figure B-25: Shopping Patterns (n=1,250)

Where do you usually go for groceries outside Arnprior?	
Destination	Relative Frequency
Kanata	Very High
Renfrew	Very High
Costco (Kanata)	Very High
Ottawa	High
Stittsville	Moderate
Farm Boy	Moderate
Walmart (Renfrew/Kanata)	Moderate
Carleton Place	Lower
Almonte	Lower
Major Driver	Description
Better Selection	Larger stores and more variety
Better Prices	Lower grocery costs
Better Stock Levels	Fewer out-of-stock items
Specialty Foods	Ethnic, health, gluten-free, international foods
Bulk Purchases	Costco shopping
Key Takeaway: Grocery spending is flowing primarily to Kanata and Renfrew, especially Costco, Walmart, Farm Boy, and larger No Frills locations.	

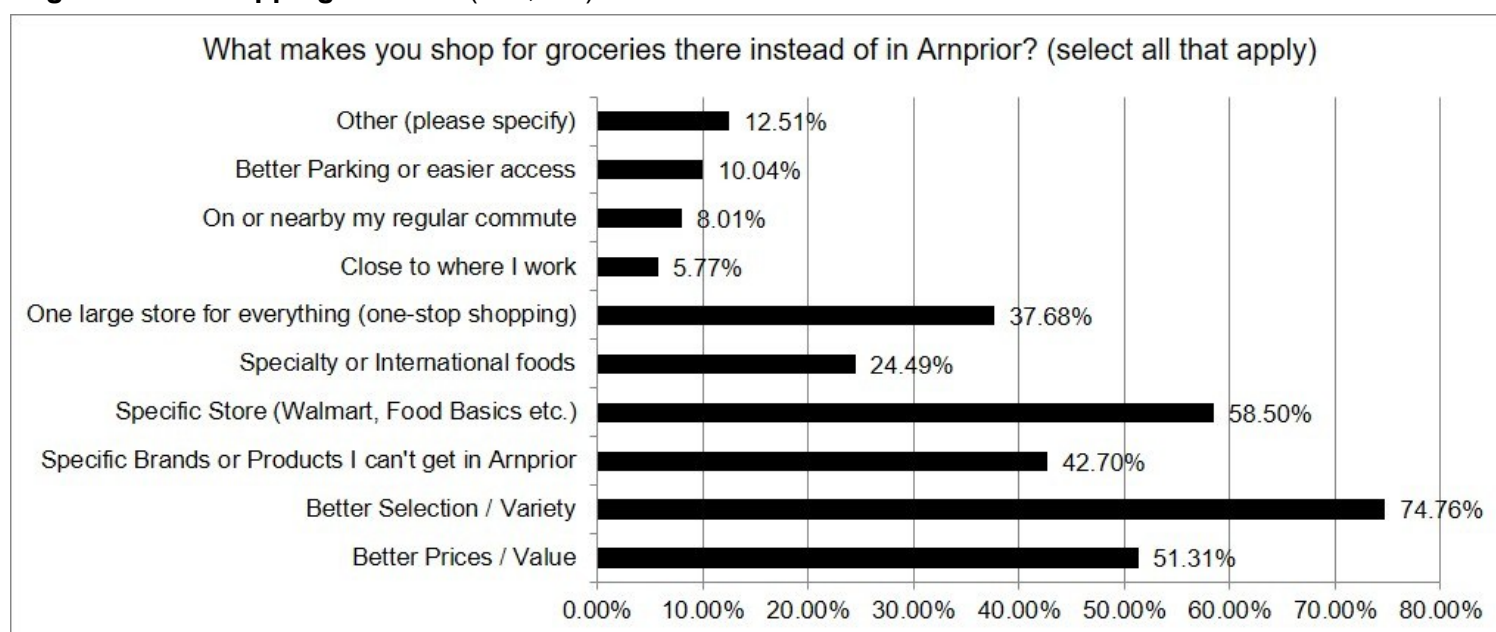
Figure B-26: Shopping Patterns (n=1,335)

Figure B-27: Shopping Patterns (n=1,399)

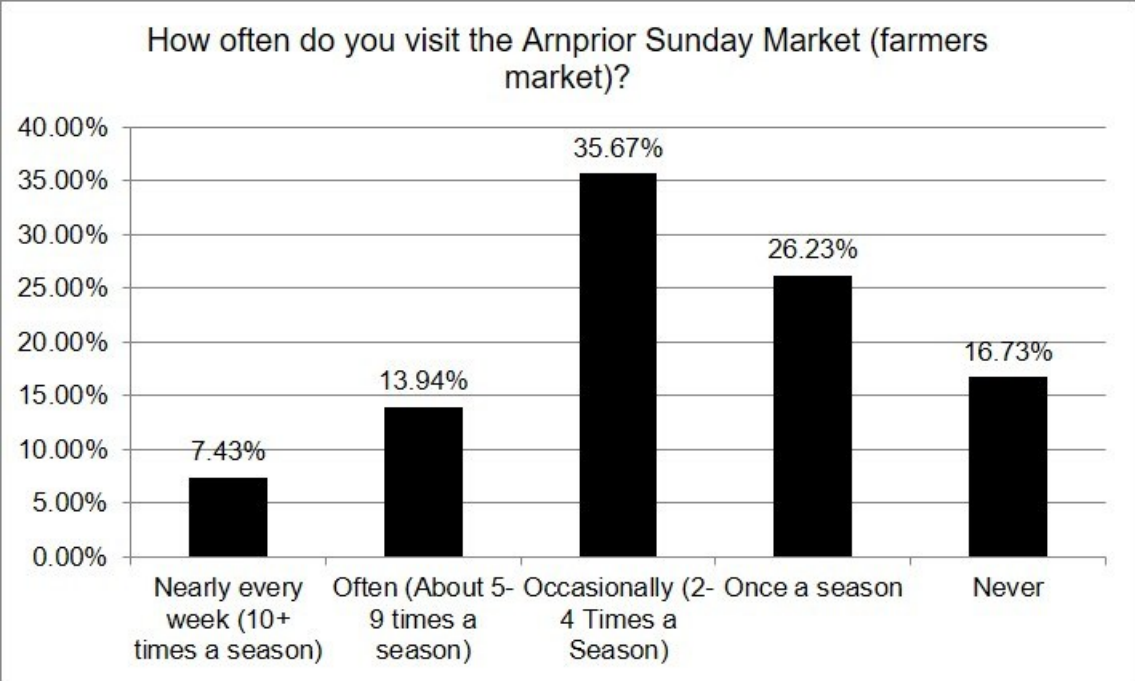


Figure B-28: Shopping Patterns (n=1,391)

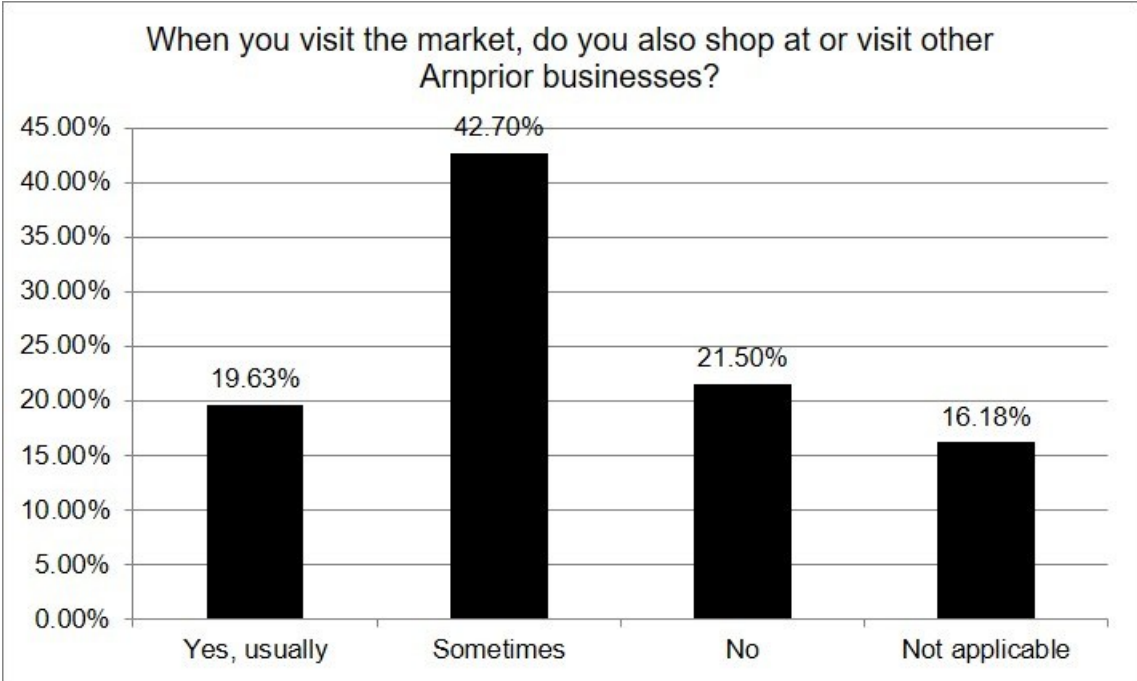


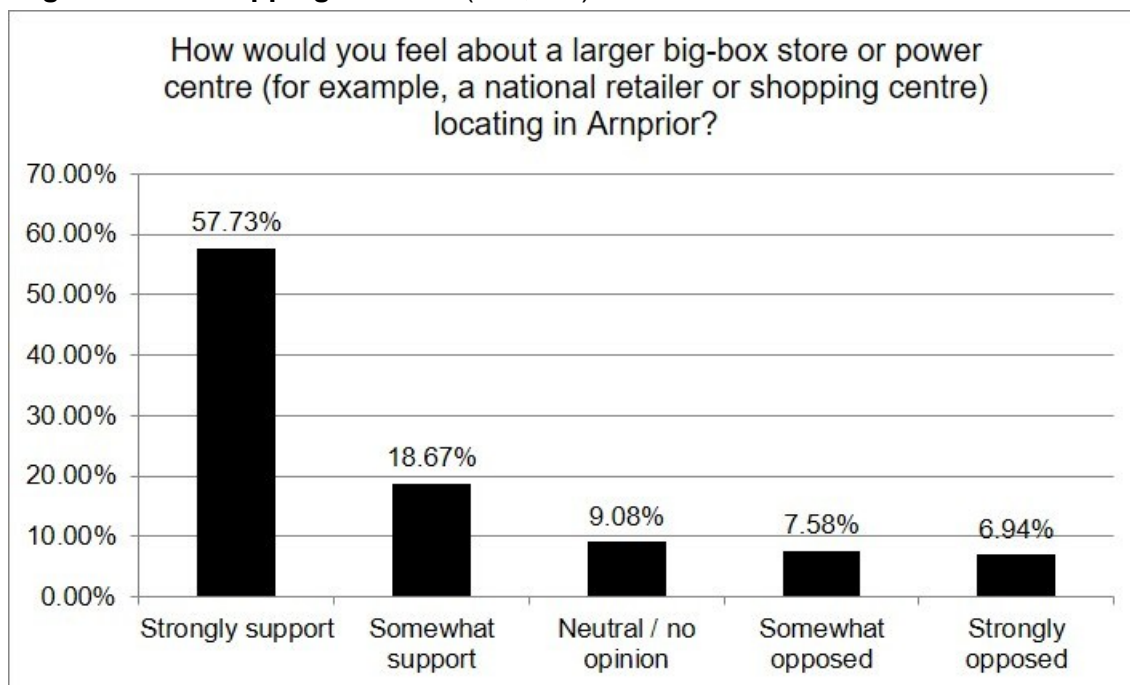
Figure B-29: Shopping Patterns (n=1,390)**Figure B-30: Shopping Patterns (n=1,398)**

Figure B-31: Shopping Patterns (n=1,193)

What retailers and services would you like to see more of in Arnprior?	
Requested Retailer / Service	Demand Level
Additional Grocery Store	Very High
Walmart / Supercentre	Very High
Farm Boy	Very High
Clothing & Shoe Stores	High
Winners / HomeSense / Marshalls	High
Costco	Moderate-High
Home Depot / Hardware Store	Moderate
Food Basics / FreshCo / Superstore	Moderate
Restaurants & Ethnic Food	Moderate
Bulk Barn	Moderate
Gym / Fitness Centre	Moderate
Entertainment & Family Activities	Moderate
Healthcare Services	Lower-Moderate
Location-Specific Requests	Frequent
Grocery store on east side / across bridge	Very Common
Better shopping selection overall	Very Common
Preserve downtown/local business character	Recurring minority
Key Takeaway: The strongest demand is for another grocery store (especially east of the bridge), Walmart-type one-stop shopping, Farm Boy, affordable clothing retailers, and better food, fitness, and entertainment options.	

Figure B-32: Shopping Patterns (n=617)

Additional Comments on Arnprior Commercial Offerings		
Theme	Frequency	Summary
Need for Additional Grocery Stores	Very High	Strong demand for a third grocery store, particularly on the east side of town. Concerns included stock shortages, variety, quality and affordability.
Demand for Big-Box / One-Stop Shopping	Very High	Requests for Walmart, Winners, Home Depot, Homesense, Bulk Barn and other large retailers.
Protecting Small Businesses	High	Many respondents opposed big-box development and wanted to preserve downtown character.
Lack of Variety and Affordability	High	Need for affordable clothing, children's items, household goods and broader retail choice.
Parking Challenges	High	Downtown, mall and Metro parking were frequently identified as concerns.
Traffic and Infrastructure Pressures	High	Growth-related congestion on Daniel Street and other corridors.
Store Hours and Accessibility	High	Businesses close too early for commuters; requests for longer and consistent hours.
Fitness, Recreation and Entertainment	Moderate-High	Demand for gyms, entertainment venues and family activities.
Restaurant and Food Preferences	Moderate	Requests for more diverse dining and fewer duplicate fast-food offerings.
Tourism and Waterfront Development	Moderate	Interest in marina, waterfront and destination-development opportunities.
Support for Existing Businesses	Moderate	Marketing, zoning and business-support improvements requested.
Transit, Walkability and Cycling	Moderate	Need for bus service, pedestrian improvements and cycling infrastructure.
Accessibility Concerns	Moderate	Improved accessibility for seniors, mobility-impaired residents and non-drivers.
Positive Feedback	Moderate	Appreciation for downtown, events, bookstore, theatre and small-town vibe.
Survey Process Comments	Low	Some concerns regarding demographic survey questions.
Key Takeaway: Residents' top priority is a new grocery store, especially on the east side of town. Responses also highlighted a divide between attracting big-box retailers and protecting local businesses, alongside calls for more shopping options, better parking and traffic flow, longer business hours, and improved recreation and tourism amenities. Overall, residents feel commercial growth is not keeping pace with population growth.		

Appendix C – Business Focus Groups Summary

The following summarizes feedback from focus group discussions with Arnprior business owners regarding business conditions, customer patterns, challenges, and opportunities to strengthen the local commercial environment. The perspectives presented reflect participants' experiences and do not necessarily reflect the needs of the gap analysis or represent the views of TR or other Arnprior businesses and residents. In addition, some of the focus group suggestions are not feasible from a legal / policy perspective, however for the sake of completeness they have been included.

1. Business Performance

Performance across businesses is mixed. Some reported steady year-over-year growth, driven largely by a strong e-commerce strategy built during the COVID-19 pandemic. Others reported being at maximum capacity with a need to expand but no available adjacent space. Lack of available space in the Downtown was identified as a constraint on growth. Newer businesses are still building their customer base. Businesses are primarily attracting visitors from outside Arnprior through social media.

However, some businesses reported declining foot traffic and sales over the past two years. Staffing has been reduced in some cases. These declines are not isolated to one type of business – closures and relocations across multiple categories (home goods, décor, clothing, specialty retail...) have occurred in recent years.

Seasonal patterns were discussed: the Christmas period (gifts) and summer (tourist traffic) are the strongest periods, while spring is consistently challenging.

A consistent observation was that a high percentage of Downtown customers come from outside Arnprior. Estimates ranged from 70% to 80% of clientele being visitors. Local residents, including those who have lived in Arnprior for many years, often do not visit Downtown or are unaware of what it offers.

2. Downtown Challenges

2.1. Community and resident engagement

Arnprior functions primarily as a bedroom community. Residents commute to Ottawa, return via the highway, and frequent highway-adjacent businesses for daily needs. There is little incentive or reason for residents to visit Downtown.

It was noted that long-time residents do not know where Downtown is or have not visited in years, and that Arnprior was “fractured” as a community.

2.2. Vacancy and Tenant Mix

In previous years, storefronts were filled immediately when they became available. Now, multiple vacancies persist, and some businesses have relocated out of Arnprior to communities like Stittsville and Renfrew.

A specific concern was raised about tenant mix: non-retail uses (e.g., martial arts studios) are occupying prime main-street retail spaces that were formerly destination stores. These uses do not contribute to the Downtown shopping experience. There was concern that without active curation of the tenant mix, the Downtown will lose its draw as a destination.

2.3. Highway Retail

Highway-adjacent big-box and chain development continues to expand, capturing transient and commuter traffic. There is no signage directing highway travellers to the historic Downtown, which is approximately 2 km from the highway exits. It was noted that travellers exiting the highway see chain restaurants and coffee shops, satisfy their needs, and leave without knowing a Downtown exists.

Some concerns were raised about the potential relocation of key Downtown anchors (Shoppers, Giant Tiger, banks...) to the highway node, which would further erode Downtown foot traffic. It was also noted that grocery offerings in Arnprior are perceived as inadequate for a growing population, with residents routinely travelling to Ottawa for grocery shopping.

2.4. Infrastructure and Accessibility

The Downtown physical infrastructure is generally praised – wide sidewalks, well-maintained roads, planters, and benches. However, several businesses operate in heritage buildings that are not wheelchair accessible, and street renovations

did not address building-level accessibility barriers. Specific improvements were recommended, including ramps and electrically activated doors for disabled access.

Parking was identified as both a strength (free, available) and a challenge (parallel parking deters some visitors; angled parking was removed). Not enough parking in the Downtown was also raised as a concern.

3. Events and Activation

There was consensus that the Town must be involved in organizing and funding events. Currently, some events are organized by businesses themselves, but this approach is unsustainable – it relies on the same small group of engaged business owners and lacks the coordination, marketing reach, and budget that the Town could provide.

4. Arnprior Market

The Arnprior Market is seen as a positive initiative and one of the few Town-organized activities that measurably increases Downtown traffic. However, several issues were identified:

- Lack of curation: the market was described as a “cattle call” with no active vendor selection. Quality varies significantly among artisans.
- Direct competition: some market vendors sell the same products as year-round Downtown businesses, creating unfair competition with businesses paying property taxes.
- Physical layout: market stalls block access to storefronts.

Recommendations include proactive vendor recruitment (including offering first-season discounts), curating vendors to complement rather than compete with existing businesses, improving layout to maintain storefront access, and hiring experienced marketing professionals rather than students.

5. Town Governance and Bureaucracy

The BIA was dissolved. Discussions about reinstatement were typically prefaced about perceived issues of how funds were being used. An alternative was proposed: a Town-funded economic development position with dedicated budget and authority, combining Town-wide and Downtown specific mandates (outreach,

tenant curation, events, marketing). There was openness to participating financially in a structure that would organize events and improve Downtown, provided the Town also contributes.

Town administration's risk aversion can limit initiatives: street closures, sandwich boards, vendor activities in parking lots, patios denied. Other municipalities manage similar issues successfully.

Participants reported limited regular communication between the Town and businesses. No councillors or staff routinely visit businesses.

The commercial-to-residential tax ratio is 2.2:1, well above the provincial range of approximately 1.2:1 to 1.4:1. Businesses pay above-average taxes without proportionate services; existing revenue should cover Downtown beautification and marketing.

6. Marketing and Promotion

No Town-led marketing exists for the Downtown. Comparable municipalities fund ongoing digital campaigns; Arnprior does not. Marketing was emphasized as a big priority. Key gaps: no highway signage directing travellers to the historic Downtown, no signage at the arena or Town facilities, no outreach to new residents, and no inserts in property tax mailings. A rotating weekly social campaign by business category was proposed.

7. Costs and Resources

Operating Costs: Key pressures are wages, property taxes, e-commerce.

Grant Programs: The Digital Main Street program was transformative for those who accessed it – providing grants and professional consultants for websites, graphics, and strategy. Awareness is low; business owners were unaware during critical growth periods. There is willingness to pay for professional support if accessible.

Community Improvement Plan (CIP): Existing grants are insufficient – the \$500 signage grant and façade grants do not offset actual costs. It was recommended to review grant amounts and introducing new forms of support (patio fee refunds, partial tax refunds, winter wage subsidies).

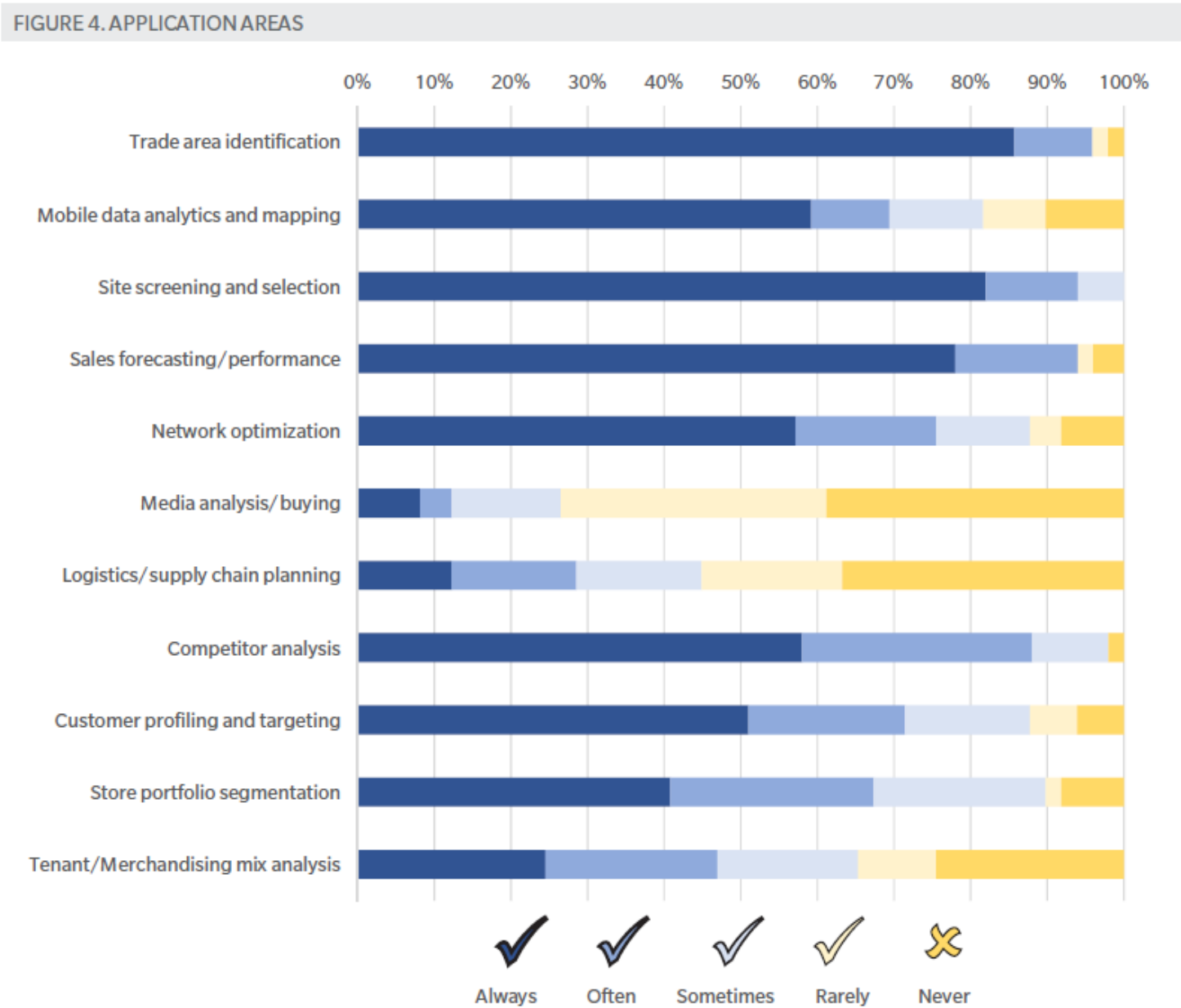
8. Evening Economy and Hours

Extended evening hours with festive lighting were proposed to attract working parents. Established owners tried late hours individually with mixed results. Participants generally agreed that a coordinated effort (one or two evenings per week) with Town event support and consistent execution could build customer habits. Individual efforts failed due to inconsistent hours.

Appendix D – Resources

The following is an excerpt from a publication titled “Corporate Location Planning in Canada: 2022.” This is a study produced by the Centre for the Study of Commercial Activity at Toronto Metropolitan University.

The following figure illustrates what factors corporate store location decision makers look at when determining locations for new stores.



The following figure illustrates what types of data corporate store location decision makers look at when determining locations for new stores.

FIGURE 5. DATA SOURCES

