# The Modern Mall’s Smarter Retail Marketing

Salthill Capital's path from gut-feel marketing to visitor and market intelligence



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EA CONNECT 2026

AGENDA

# What We'll Cover Today

01 Meet Salthill Capital

02 Why Understanding Your Market Matters

03 How We Got There

04 What We've Learned

# Who are Salthill Capital

**$3B**
assets under management

**10M+ sq ft**
under management nationally

Salthill Capital is a Canadian, privately held and employee-owned real estate investment and management firm, with a national footprint spanning retail, industrial, office, and mixed-use assets.

A centralized marketing team sets brand and campaign strategy for property-level teams across the retail portfolio — from urban retail like 110 Bloor Street West to shopping centers such as Billings Bridge Centre and The Shops at Pickering City Centre, which draws 5.5M+ visits a year.

*Employee-owned with an ESG strategy embedded across the portfolio — including a GRESB-aligned fund and BOMA BEST certification commitments.*









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# Why Understanding Your Market Matters

*“Understanding a center's profile is what turns a marketing plan into a strategy — aligned to real opportunity, not just what's worked before.”*

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# Marketing Outpaced the Data

01

Every centre had a marketing plan — but few were built on who actually walked through the doors.

02

Rising competition from newer, larger centres made it harder to defend visit share with broad, one-size-fits-all campaigns.

03

Leasing and marketing teams lacked a shared, consistent view of the trade area to plan around.

# Four Questions Every Property Needed Answered

01

Who visits each centre, and when?

02

Where do those visitors come from?

03

Who are the real competitors for those visitors?

04

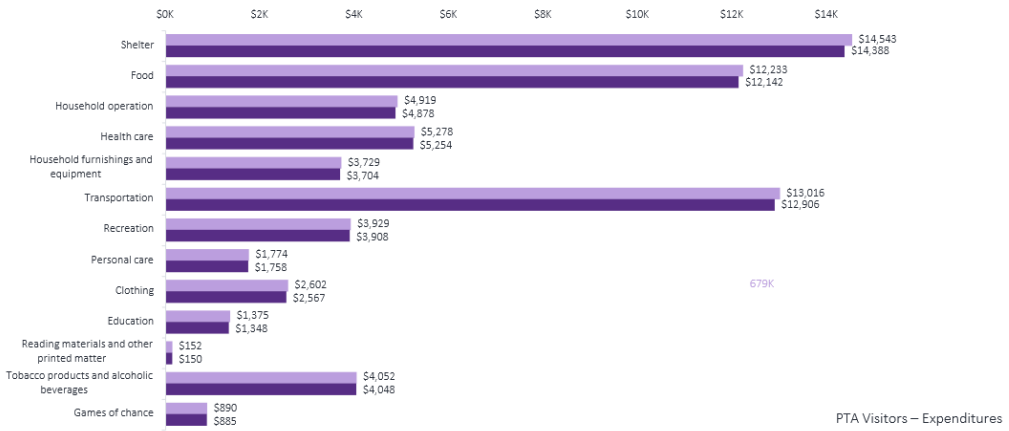
Which loyal visitors are also shopping elsewhere?

# One Dataset, Two Business Functions

Connecting visitation, spending, and lifestyle patterns serves marketing and leasing at once

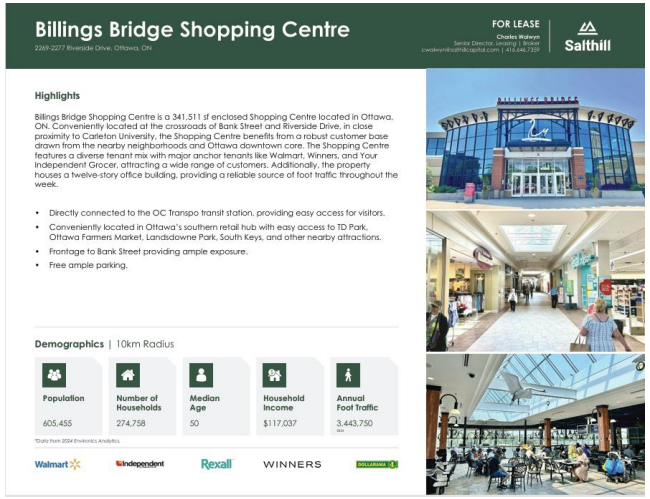
## FOR MARKETING

**Build a stronger view of mall shopper behaviour, spending, and lifestyle characteristics to support broader consumer planning.**




## FOR LEASING

**Understand where unmet demand or market gaps exist across the center network, so growth efforts focus on the most promising audiences and locations.**




*Together, this work helps Salthill prioritize the audiences most relevant to each centre and make more data-driven choices about positioning and growth.*

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# How We Got There

*“One , run consistently at every center — turning EA data into knowledge Salthill applies nationally.”*

# Three Data Sources, One National Playbook

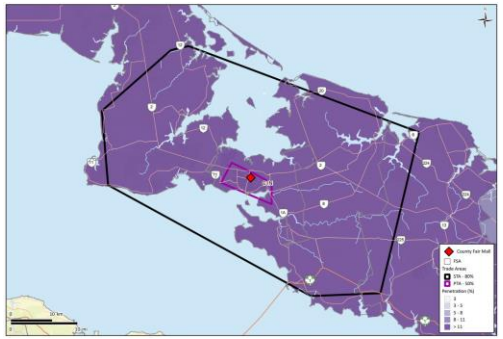
The same three EA data sources run at every Salthill center, coast to coast

VISITATION

## MobileScapes

Anonymized location data shows who visits each center, how often, and when.

**Run at every center, from Ontario to British Columbia**



LIFESTYLE

## PRIZM

Lifestage and lifestyle segments describe who those visitors are.

**A shared segment language across the whole portfolio**

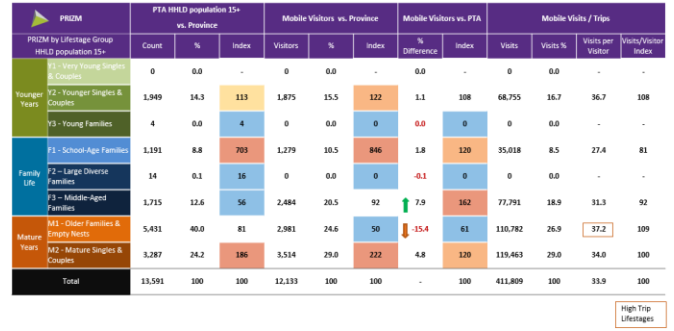



SPENDING

## DemoStats & HouseholdSpend

Trade-area demographics and spending patterns round out the picture.

**Benchmarked consistently, centre to centre**



| PRIZM | | PTA HHLD population 15+ vs. Province | | | Mobile Visitors vs. Province | | | Mobile Visitors vs. PTA | | Mobile Visits / Trips | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| PRIZM by Lifestage Group HHLD population 15+ | | Count | % | index | Visitors | % | index | % Difference | index | Visits | Visits % | Visits per Visitor | Visits/Visitor Index |
| Younger Years | Y1 - Very Young Singles & Couples | 0 | 0.0 | - | 0 | 0.0 | - | 0.0 | - | 0 | 0.0 | - | - |
| | Y2 - Younger Singles & Couples | 1,949 | 14.3 | 113 | 1,875 | 15.5 | 122 | 1.1 | 108 | 68,755 | 16.7 | 36.7 | 108 |
| | Y3 - Young Families | 4 | 0.0 | 4 | 0 | 0.0 | 0 | 0.0 | 0 | 0 | 0.0 | - | - |
| Family Life | F1 - School-Age Families | 1,191 | 8.8 | 703 | 1,279 | 10.5 | 846 | 1.8 | 120 | 35,018 | 8.5 | 27.4 | 81 |
| | F2 – Large Diverse Families | 14 | 0.1 | 16 | 0 | 0.0 | 0 | -0.1 | 0 | 0 | 0.0 | - | - |
| | F3 – Middle-Aged Families | 1,715 | 12.6 | 56 | 2,484 | 20.5 | 92 | 7.9 | 162 | 77,791 | 18.9 | 31.3 | 92 |
| Mature Years | M1 - Older Families & Empty Nests | 5,431 | 40.0 | 81 | 2,981 | 24.6 | 50 | -15.4 | 61 | 110,782 | 26.9 | 37.2 | 109 |
| | M2 - Mature Singles & Couples | 3,287 | 24.2 | 186 | 3,514 | 29.0 | 222 | 4.8 | 120 | 119,463 | 29.0 | 34.0 | 100 |
| Total | | 13,591 | 100 | 100 | 12,133 | 100 | 100 | - | 100 | 411,809 | 100 | 33.9 | 100 |

High Trip Lifestages

*Because every centre runs the same , findings build into shared knowledge Salthill can apply the next time it enters a new market.*

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# What Each Centre Analysis Delivers

The standard package run for every centre in the portfolio

01

### Executive dashboards

A PTA-level summary view for quick, centre-by-centre comparison.

02

### PRIZM segment analysis

Lifestage and top-8 segment breakdowns of who visits, and how often.

03

### Trade area mapping

Visitor heat maps and penetration maps across the PTA and STA.

04

### Demographic trends

Five-year projections for population, income, and diversity.

05

### Cross-shop analysis

Which competing centres share the most visitors, and how often.

06

### Year-over-year comparison

Visitor volume and expenditure shifts tracked release to release.

# Know Your Visitor, Not Just Your Neighbourhood

Every strategic decision starts with the same four questions about who actually shows up

**WHO**

Lifestage and lifestyle, not just age and income

**WHEN**

Day-part and seasonal visit patterns

**HOW OFTEN**

Frequency and loyalty, beyond one-time reach

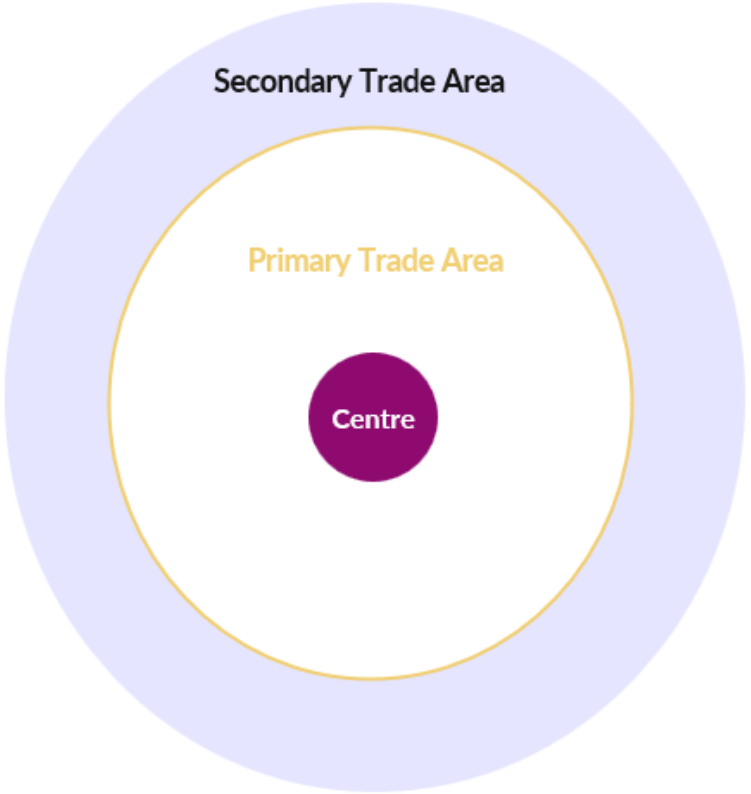
**WHERE FROM**

The catchment that actually drives visits

**A centre's visitor profile rarely mirrors its surrounding neighbourhood — and that gap is where marketing and leasing strategy begins.**

# Defining Who Counts as “Local”

Every centre gets its own trade area, built from where its actual visitors come from — not a fixed radius.




## Primary Trade Area

The area generating 50% of a center's total visits.

## Secondary Trade Area

The wider area generating 80% of visits, excluding the PTA to isolate its unique reach.

*Diagram illustrates the methodology using an anonymized example property; figures are not specific to any Salthill center.*

# A Local Core and a Broader Reach Play Different Roles

*The primary and secondary trade areas point to two different strategies*

**PRIMARY TRADE AREA**

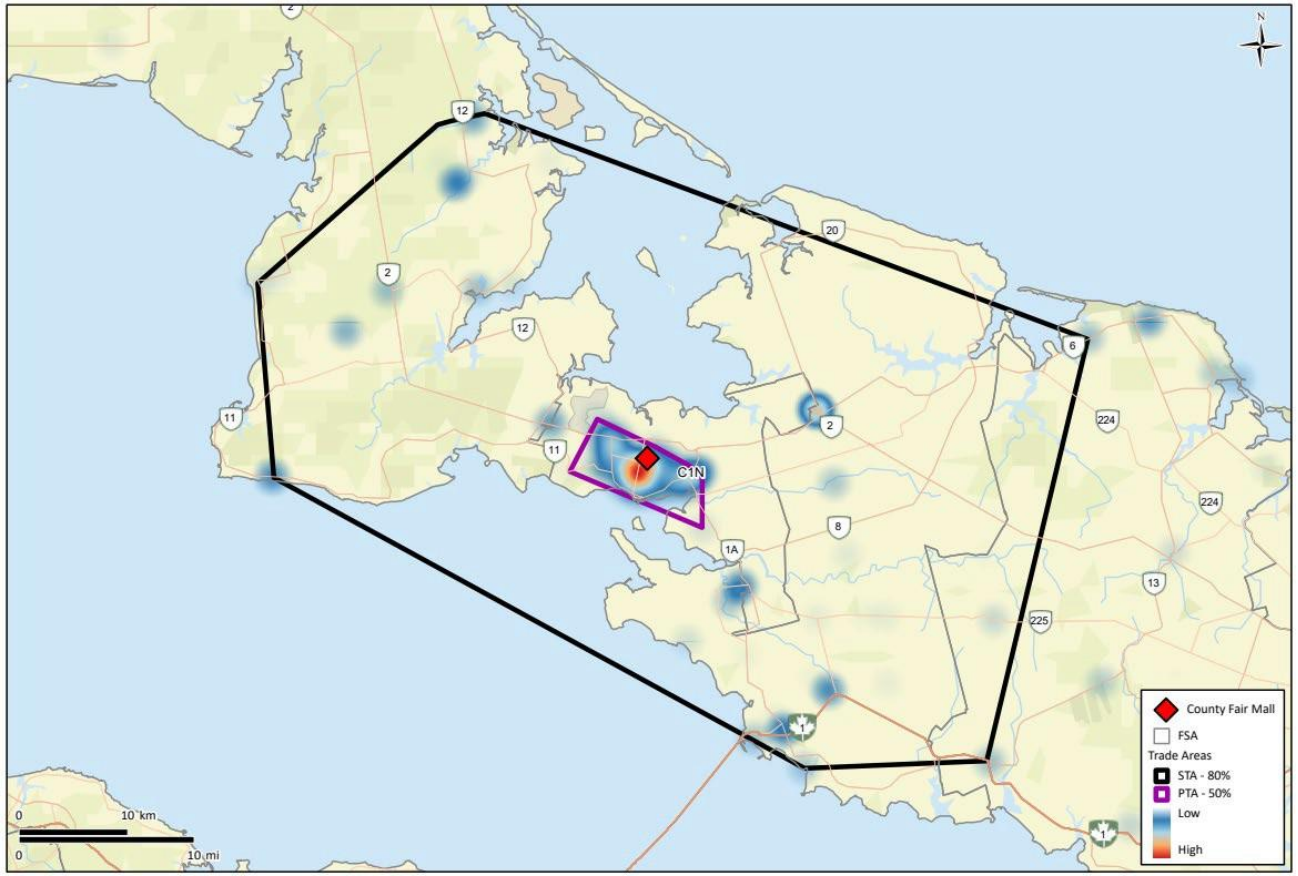
## The loyal core

Where the center already earns most of its visits. The priority here is retention — deepen frequency and share of wallet.

**SECONDARY TRADE AREA**

## The growth opportunity

A wider catchment the center doesn't yet fully capture. The priority here is conversion — targeted marketing and the right tenant mix to pull them in.




***Treating both areas the same way leaves growth on the table — each calls for a different marketing and leasing response.***

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# Gaps Become the Growth Plan

Where visitor spending and demand outpace what a center currently captures

01

### Identify the gap

Compare what trade-area residents spend against what the centre's visitors actually capture, category by category.

02

### Size the opportunity

Weigh each gap against segment demand and competing centres already capturing that spend.

03

### Act on it

Feed the gap into leasing conversations for the right tenant mix, and into marketing to reach the segments most likely to close it.

*The same gap analysis serves both teams at once — a leasing lead for the property team, a targeting cue for marketing.*

# What We've Learned

# From Insight → Leasing & Marketing Decisions

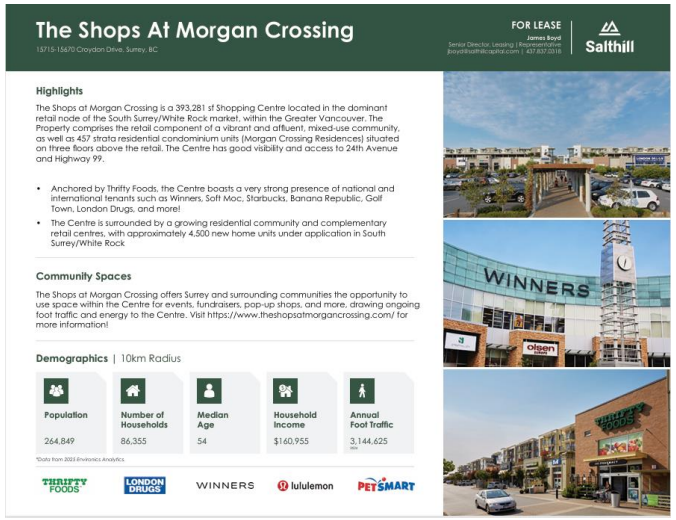
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Campaigns re-targeted to the segments driving the most frequent visits, not just the most visitors.



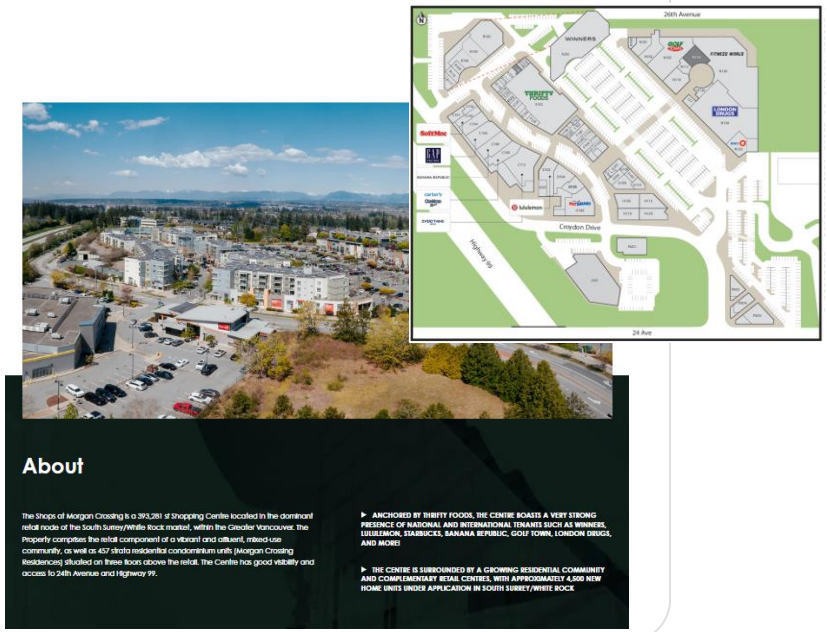

## PORTFOLIO

A repeatable trade-area  rolled out across the portfolio, replacing one-off studies.




## LEASING

Spending-gap findings shared with leasing teams to inform tenant mix conversations.




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PICKERING
CITY·CENTRE

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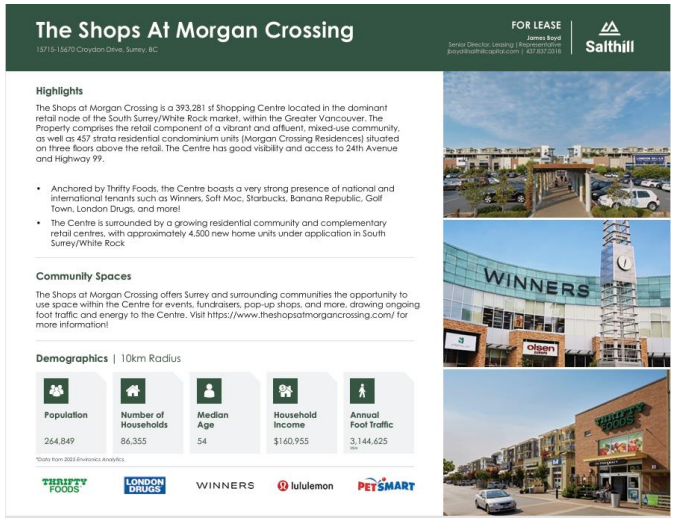
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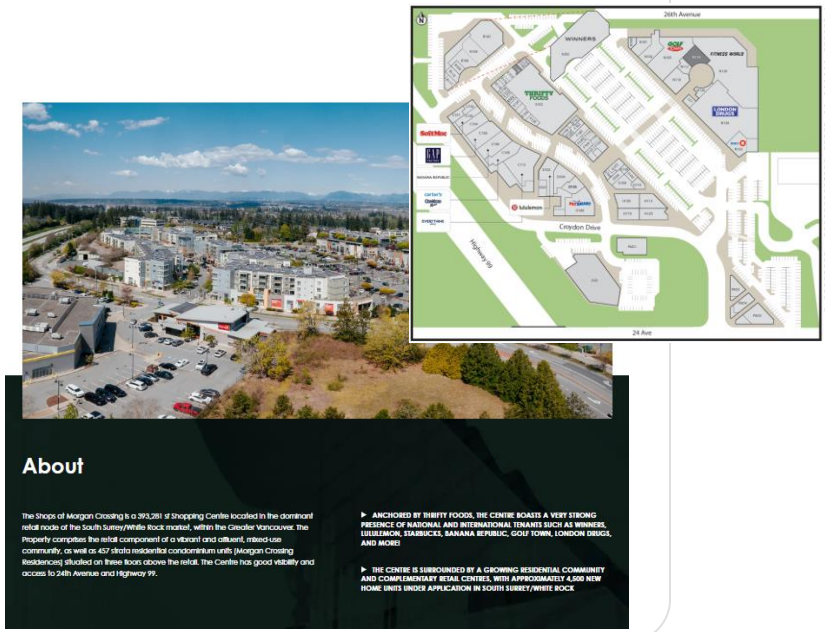

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# What Other Retail Marketers Can Take Away

01 Mall demographics and visitor demographics are rarely the same — measure who actually shows up.

02 Loyalty is a spectrum. Track where else your visitors shop, not just whether they visit you.

03 Frequency matters as much as reach — the highest-visiting segment isn't always the most loyal one.

04 Spending gaps are leasing signals as much as marketing ones — share findings across teams.

05 A repeatable  across a portfolio beats a one-off study at a single center.

# Thank you.



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