Get to Know the Changing Shopping Habits of Canadians

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ENVIRONICS
ANALYTICS

Today's Presenters

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OPEN
BUSINESS AS
NEW NORMAL

COVID-19 Behaviours and Norms?

ENVIRONICS
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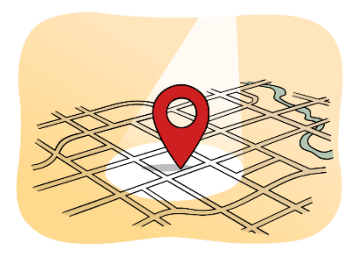
Data Development

Used by over 1,000 Canadian Organizations

Comprehensive
High Quality
Proprietary
Actionable

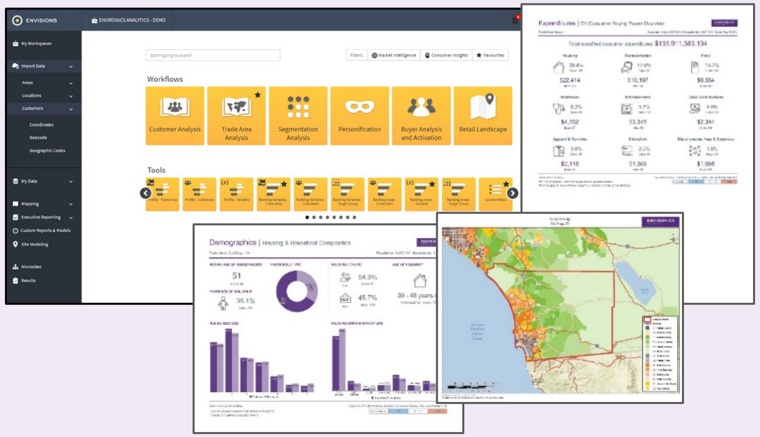


30,000 Current Variables at Postal Code Level

- Demographic
- Behavioural
- Segmentation
- Financial
- Mobile Analytics
- Psychographic

Advanced Analytics

80% in Subscription & Purpose-Built Platform



- Segments & Personas
- Target Marketing
- Cross Selling
- Product Assortment
- Media Planning
- Message Targeting
- Site Selection
- Omni-Channel

Marketing Activation

The “Intel Inside” in All Channels

Traditional Media

Bell Media
corus.
Bell Media
PATTISON
kinetic
ROGERS Sports & Media
VISTAR MEDIA

Online, Mobile and Social

Bell Media
theTradeDesk
ROGERS Sports & Media
MiQ
eyeota
CONNECTED INTERACTIVE

ENVIRONICS ANALYTICS

MobileScapes

Leveraging Mobile Movement Data to Understand Changing Consumer Behaviours

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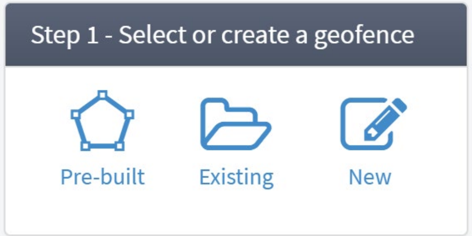
What are Mobile Movement Data?

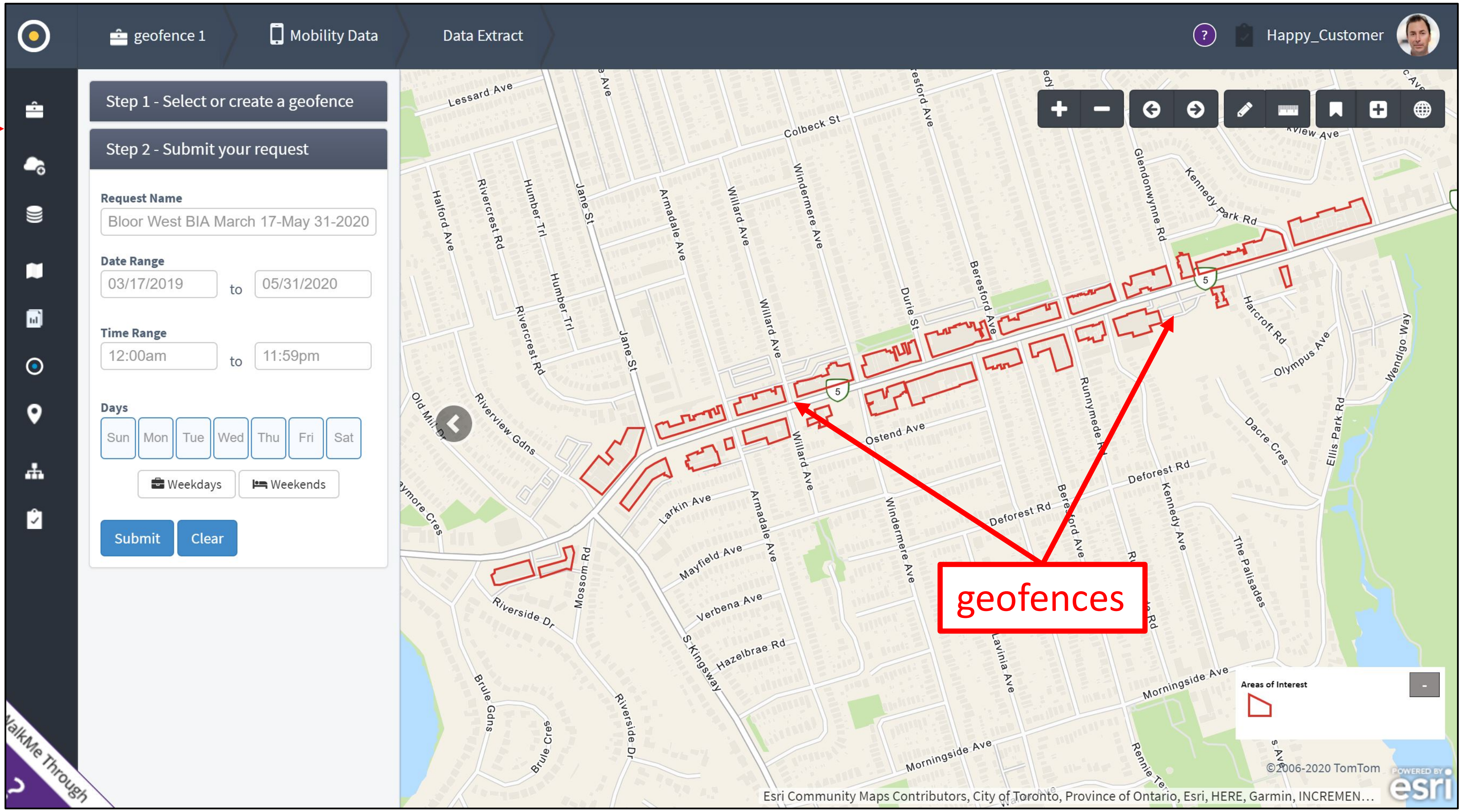
Anonymized, permission-based data collected from location-enabled apps on mobile devices

- Unique, persistent, anonymous device ID, along with a day, time and location for each observation
- All observed latitude and longitude coordinates are moved to the nearest 6-digit postal code
- Researchers can “observe” devices within a defined area such as a store, public square or on a roadway for a given date and time range
- The common evening location (CEL) and common daytime location (CDL) are inferred according to where these devices are most frequently observed during the day and at night

New Geofence Library

MobileScapes ENVISION





100,000
Polygons

- Grocery
- Drug
- Mass Merchandisers
- Category Killers
- Malls
- Greenspaces
- Golf Courses
- Banks
- Credit Unions
- Auto Dealerships
- Coffee Shops
- Restaurants (QSR and Sit Down)
- Retailers

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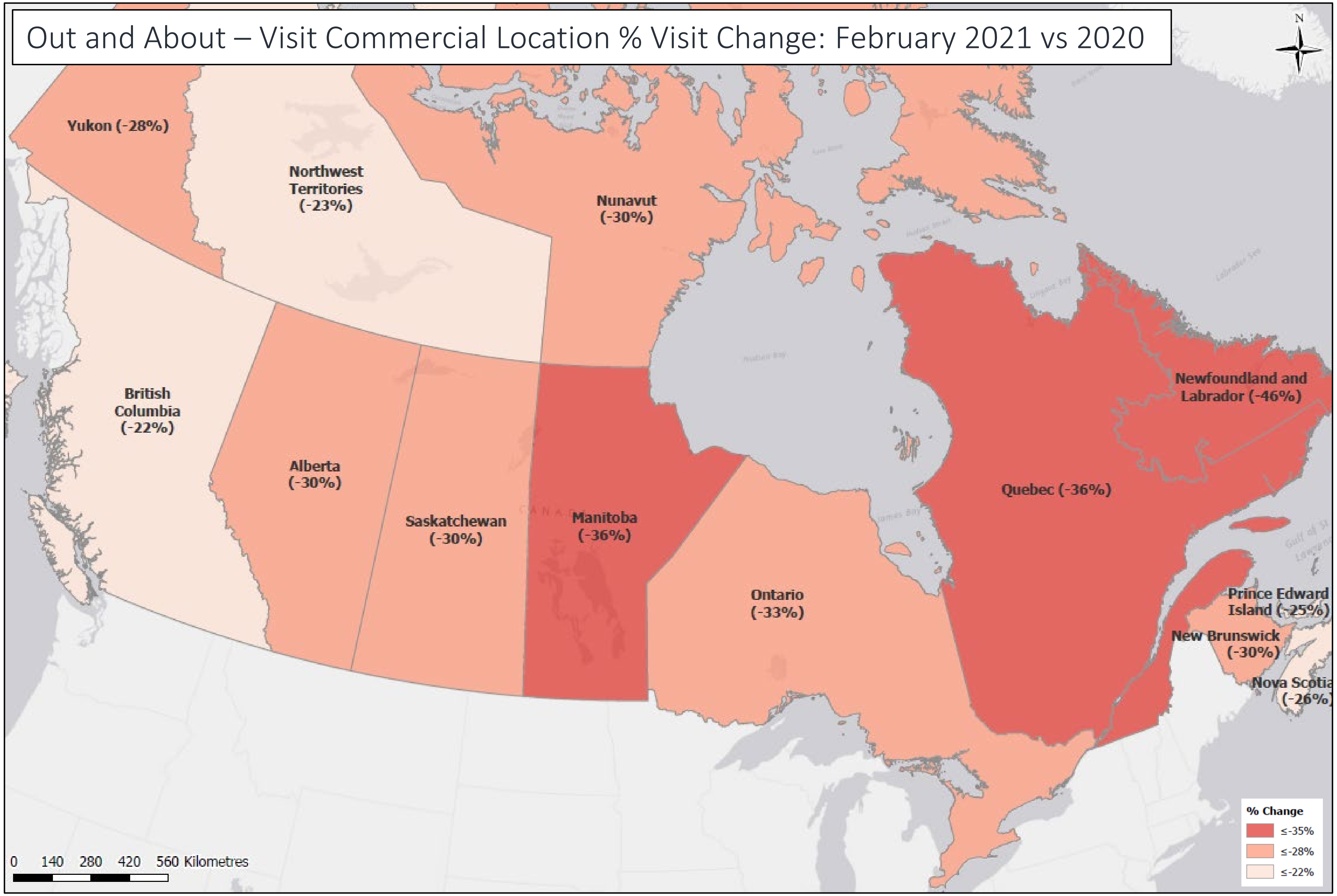
Mobile Movement Applications

1. Is the profile of shoppers different from what it was a year ago?
2. Are my trade areas larger or smaller than they used to be?
3. Are my shoppers coming from work or home when they come to my store?
4. What is the effect of my marketing campaign – is my target consumer responding?
5. How are my stores doing compared to my competitor stores?
6. What is the impact of a new competitor that just opened in my market?
7. Which of my stores are located in areas where consumers are out shopping and am I getting my fair share of that activity?

Out & About – Travel to Commercial Areas

40% in 2021
58% in 2020
63% in 2019



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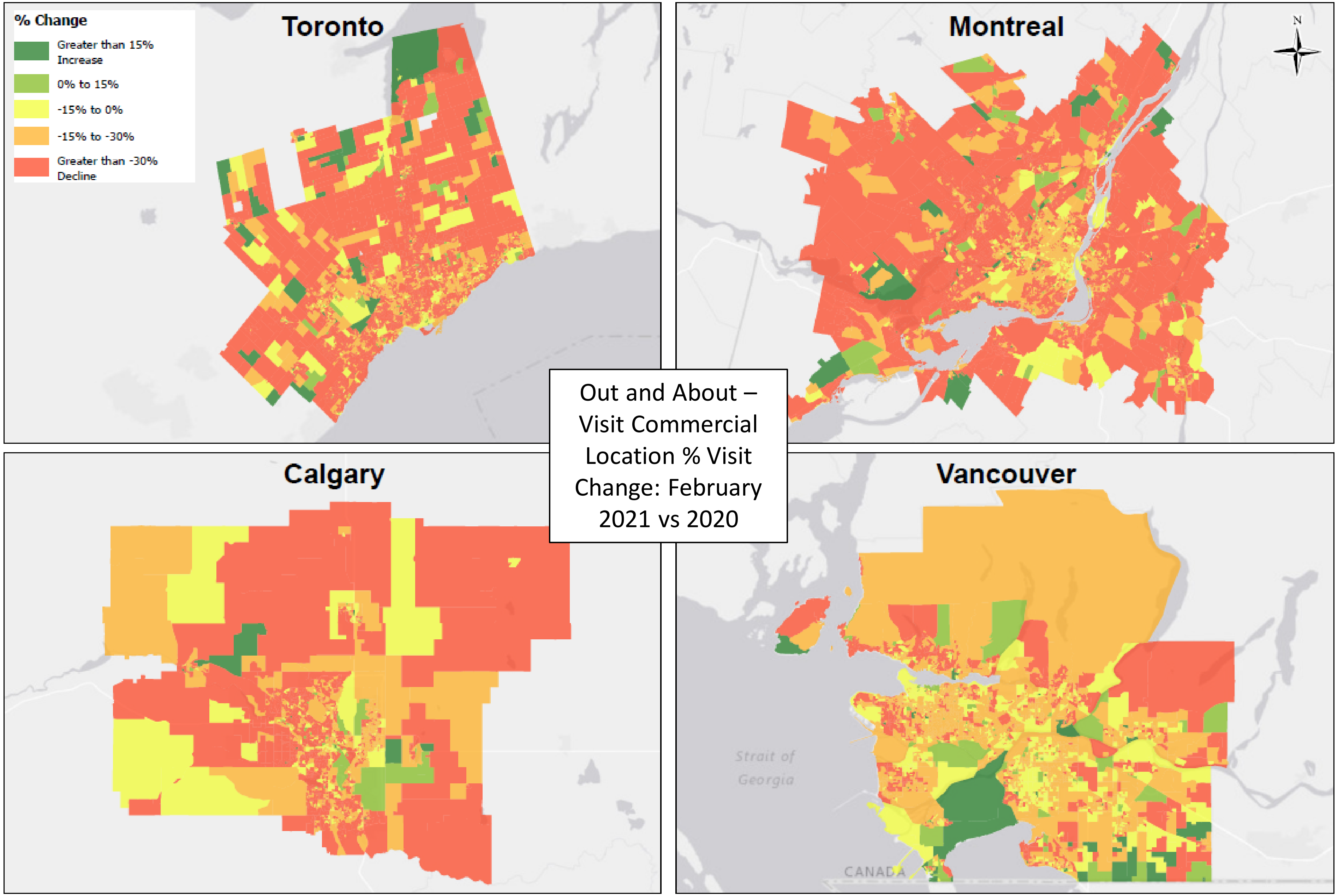
Geography: Province
Source: Out and About, February 2020/2021, Visited Commercial Location

- 33% in Toronto & Montreal, - 32% in Calgary, - 21% in Vancouver

Out and About – Visit Commercial Location % Visit Change: February 2021 vs 2020

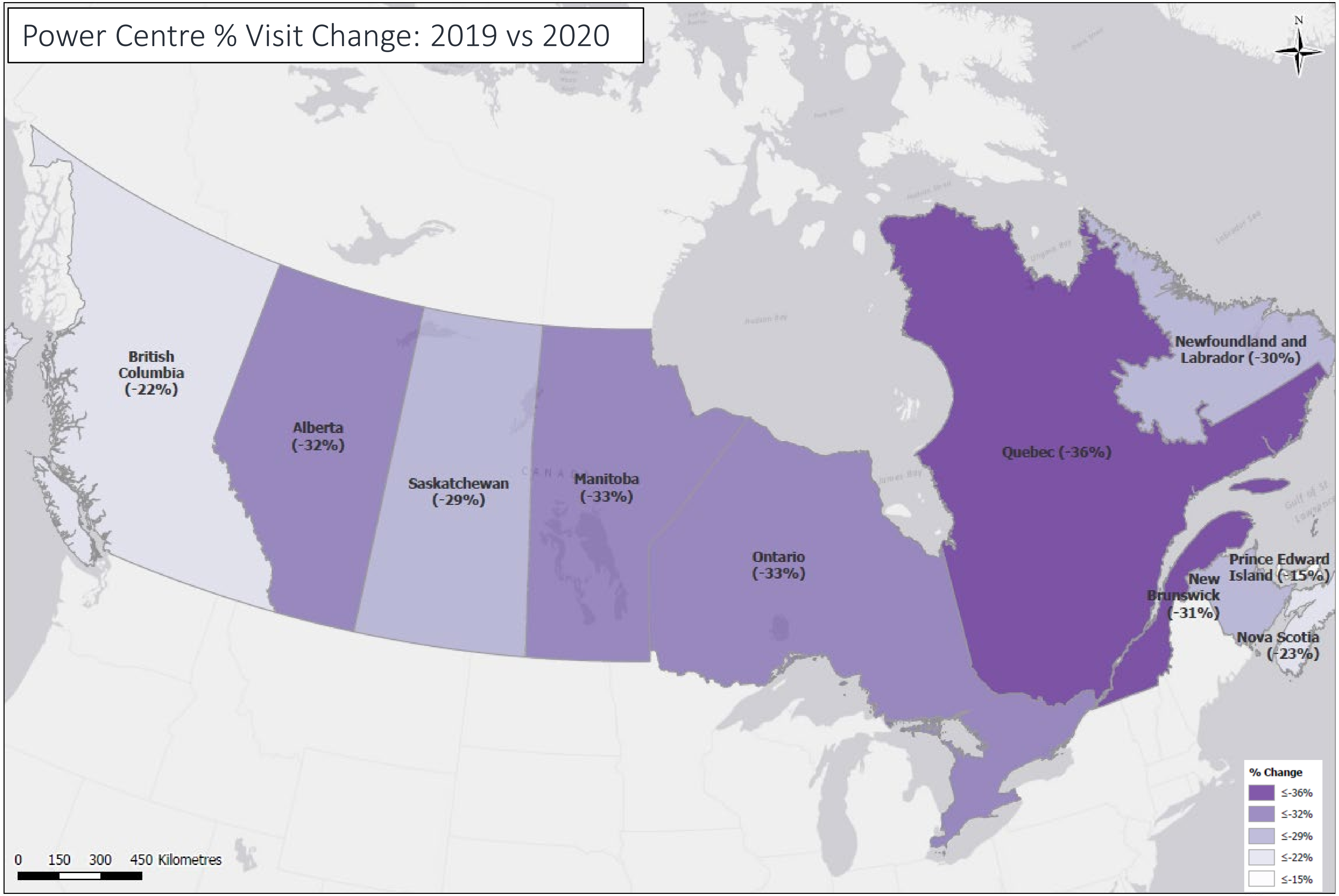


ENVIRONICS ANALYTICS

Geography: Census Metropolitan Area (CMA) by DA
Source: Out and About, February 2020/2021, Visited Commercial Location

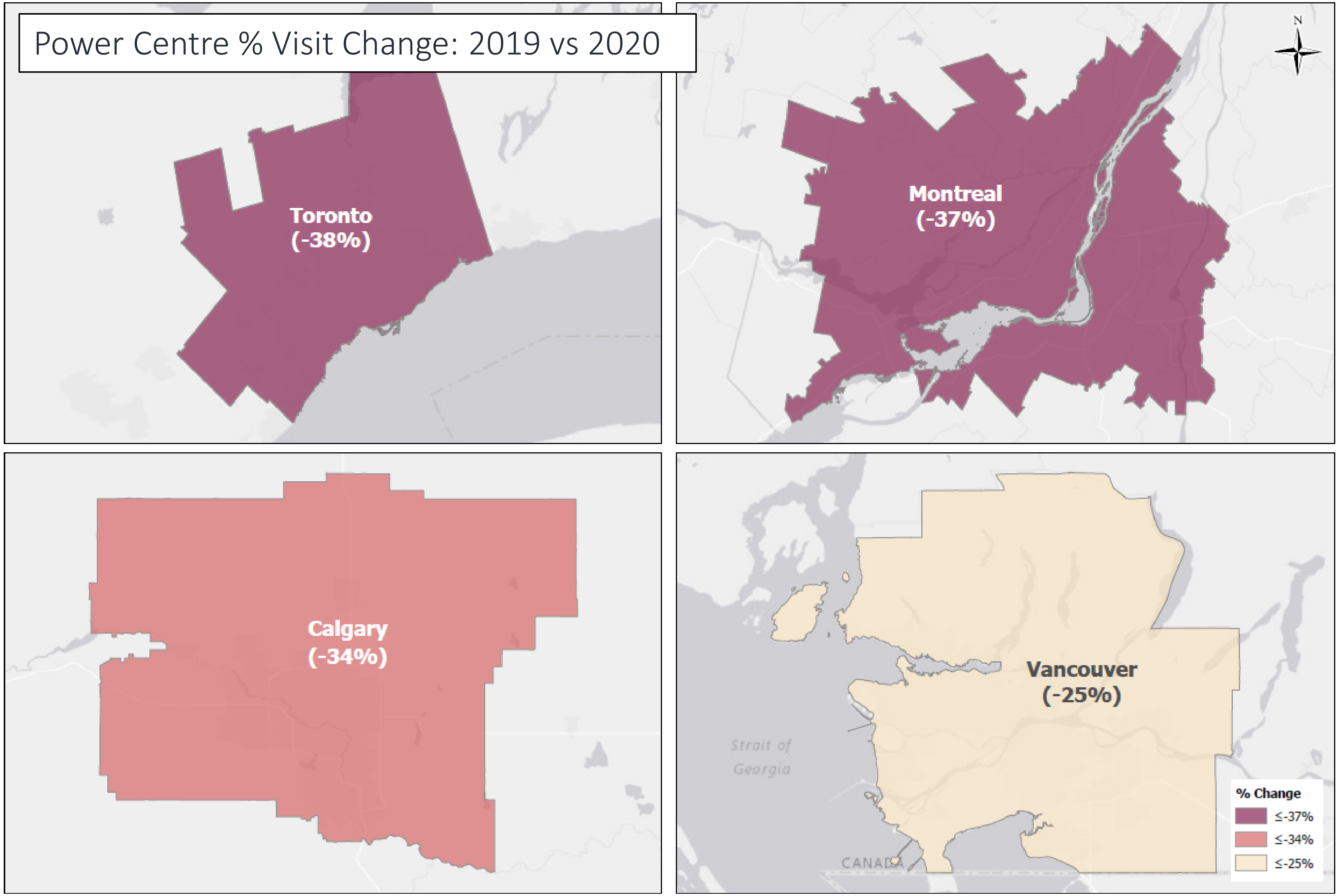
Power Centres are Changing

Quebec Hardest Hit with 36% Fewer Visits to Power Centres



Geography: Province
Source: MobileScapes, January 2019 – December 2020, Retail Power Centres

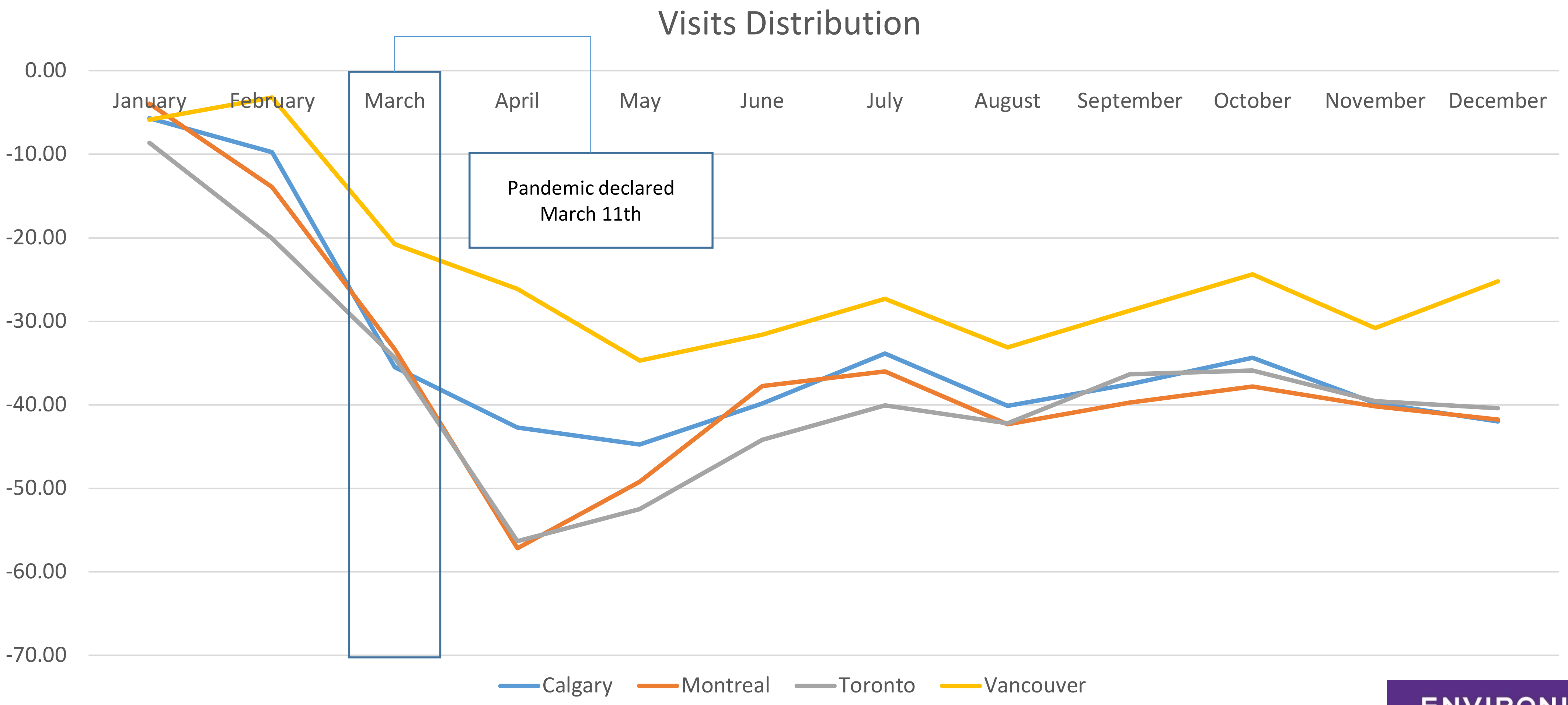
Power Centres in Toronto and Montreal Experienced - 35% in Visitation



Geography: Census Metropolitan Area (CMA)
Source: MobileScapes, January 2019 – December 2020, Retail Power Centres

ENVIRONICS ANALYTICS

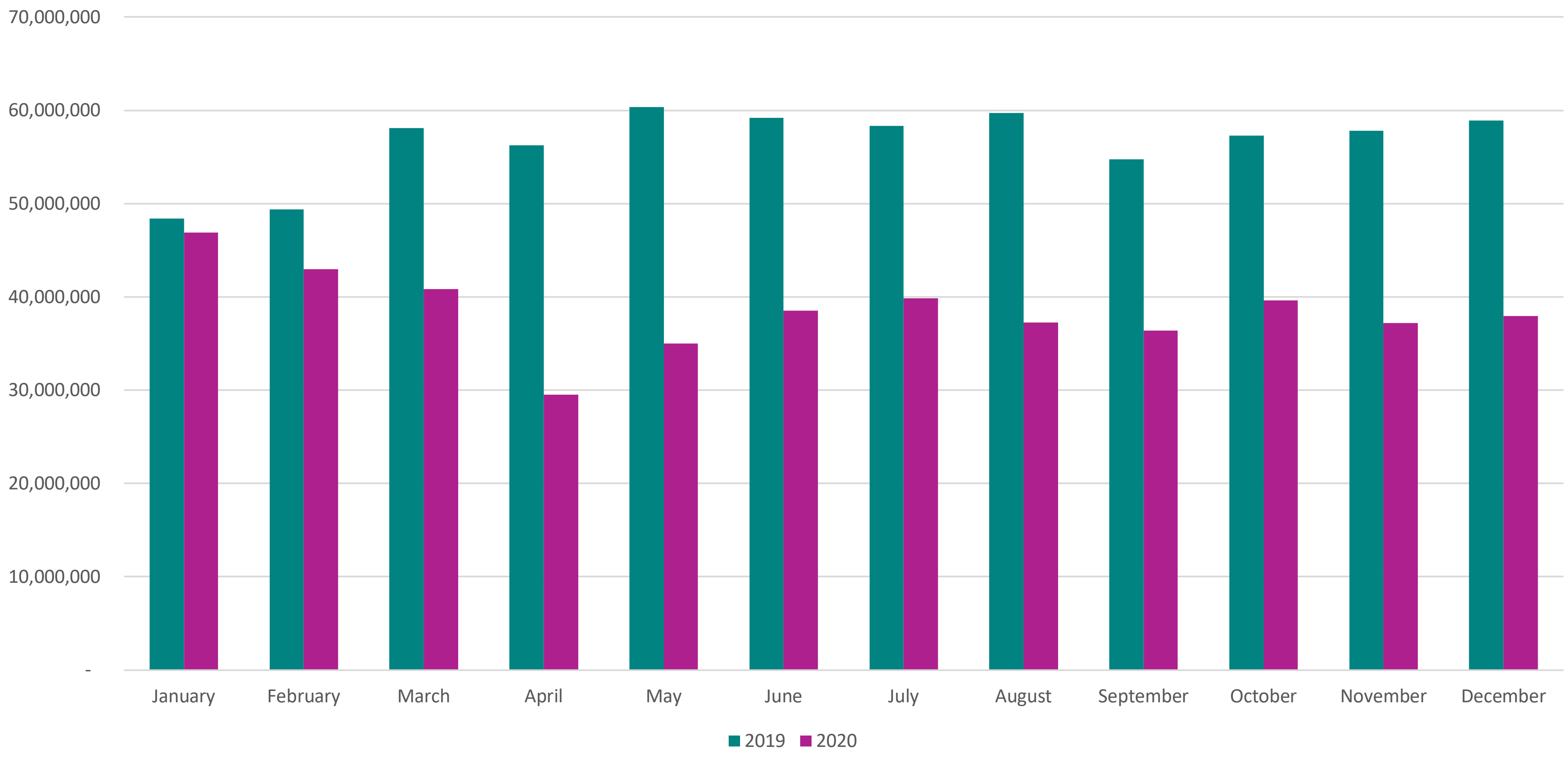
Toronto Power Centres saw Visitor Drop from 143M to 88M; Vancouver 37M to 28M (YOY)



Geography: Census Metropolitan Area (CMA)
Source: MobileScapes, January 2019 – December 2020, Retail Power Centres

ENVIRONICS ANALYTICS

Total Power Centre Visits in 2020 were 217M Less than in 2019



Geography: Canada
Source: MobileScapes, January 2019 – December 2020, Retail Power Centres

ENVIRONICS ANALYTICS

Initial Lockdown: -48% Power Centre Visits

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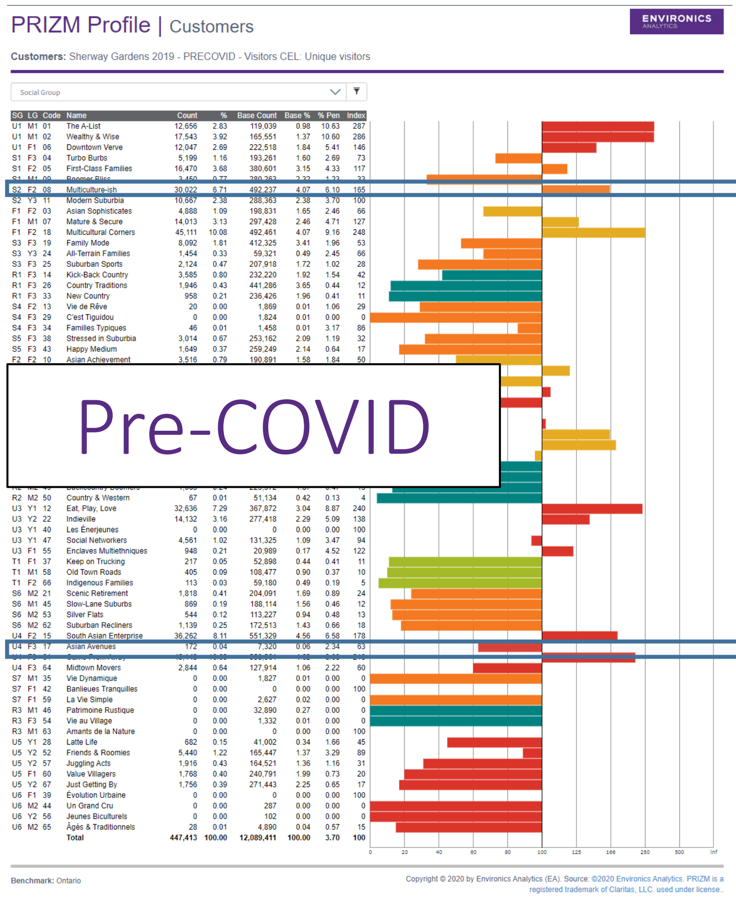
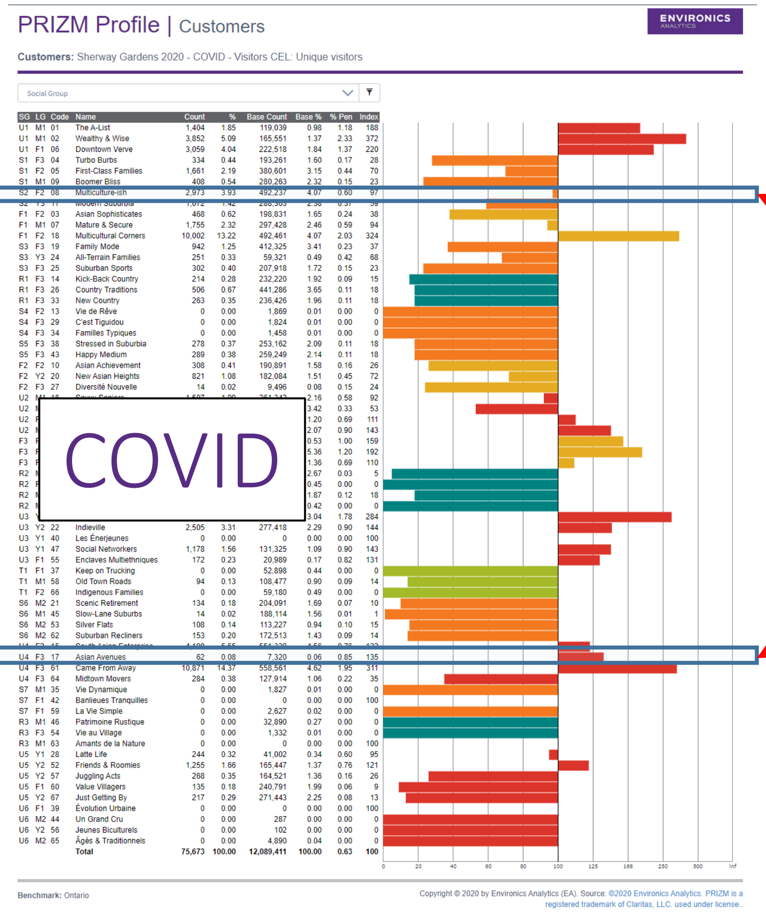
Geography: Canada
Source: MobileScapes, January 2019 – December 2020, Retail Power Centres

Become Proactive Through Consumer Insight as Shopper Habits Change

PRIZM Can Help You Understand Shopper Profile Changes





How are your visitors changing over time?

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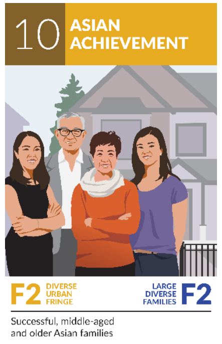
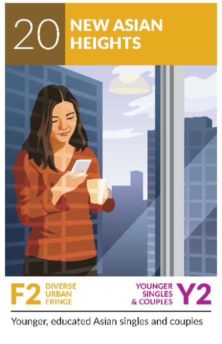
Are the Types of Shoppers Coming Back Similar or Different Than the Past?

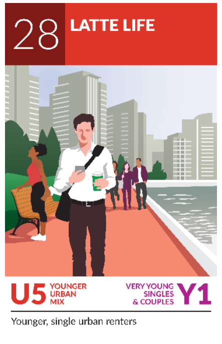
				Estimated Visitors					
				August 2020		August 2019			
SG	LG	Code	Name	Count	%	Count	%	Index	Visitor change (%)
U3	Y1	12	Eat, Play, Love	2,894	19	4,369	24	79	-33.75
U4	F3	17	Asian Avenues	1,980	13	2,185	12	108	-9.35
F2	F2	10	Asian Achievement	1,584	10	1,456	8	130	8.78
F2	Y2	20	New Asian Heights	1,371	9	1,274	7	129	7.59
U5	Y1	28	Latte Life	990	7	910	5	130	8.78
F3	F2	30	South Asian Society	716	5	670	4	128	6.87
F1	F2	03	Asian Sophisticates	646	4	728	4	106	-11.30
F3	F1	32	Diverse & Determined	533	4	1,092	6	58	-51.19
U3	Y1	47	Social Networkers	466	3	606	3	92	-23.10
U1	F1	06	Downtown Verve	376	2	572	3	79	-34.18
Top 10 Segments - Total Estimated Visitors				15,234	76	18,205	76	100	-16.32

Pinpoint opportunity segments based on your shifting visitor profile.

Home in on key visitor segments to engage with and refine your target audience definition.







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Understand Who They Are by Banner, Location and Target Group for Marketing Communication

Demographics

Average Income
$99,045

Occupation
Service Sector

Vis Min Presence
High

Spending

Food
$12,164/household

Personal Care
$2,182/household

Clothing
$4,883/household

30 SOUTH ASIAN SOCIETY

F3 MIDSCALE URBAN FRINGE

LARGE DIVERSE FAMILIES F2

Middle-aged, middle-income
South Asian families

Behavioural

Enjoy Visiting
Historic Sites

Media Channel
Online

Favourite Attraction
Dinner Theatre

Psychographics

Traditional
Families

North American
Dream

Joy of
Consumption

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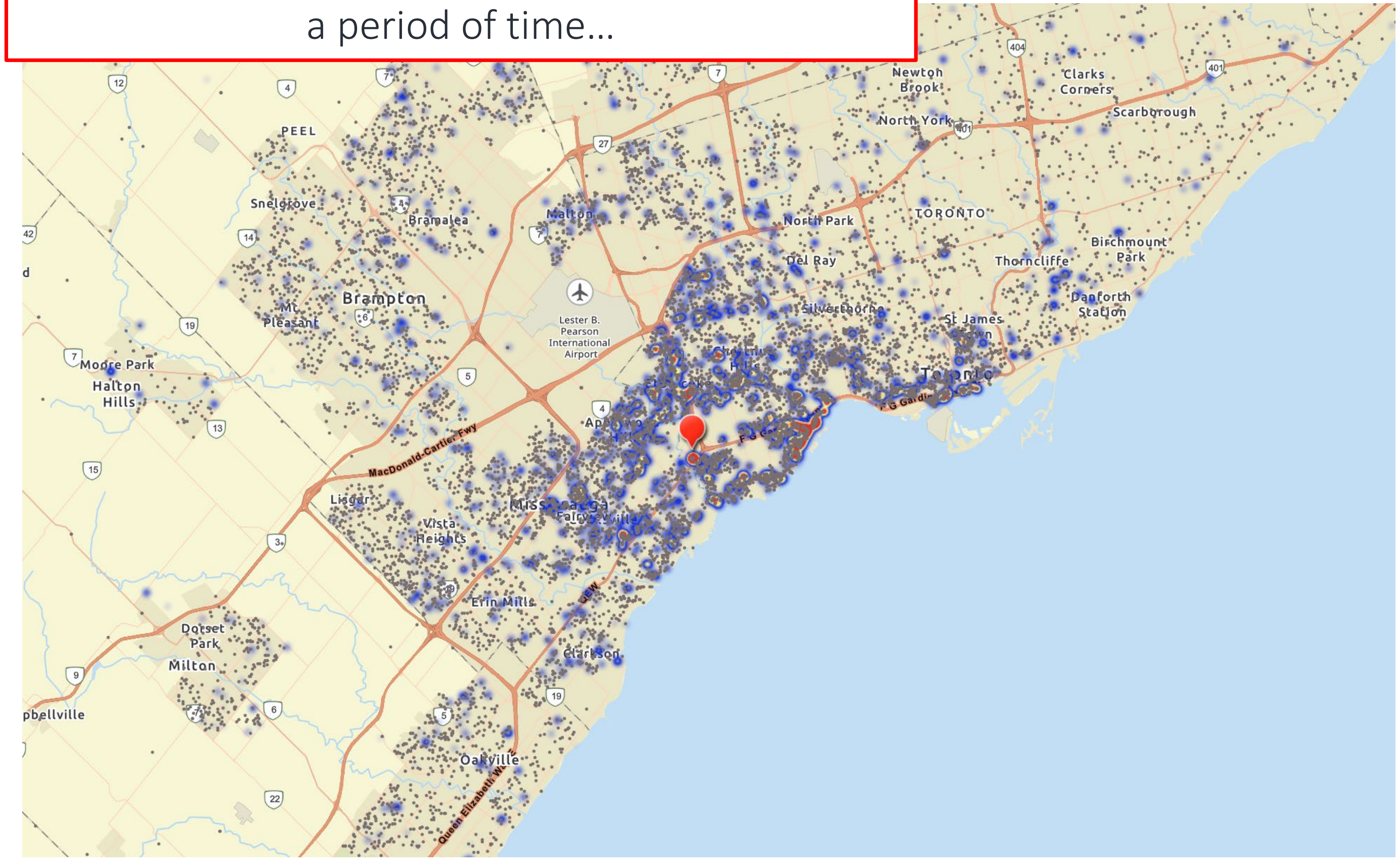
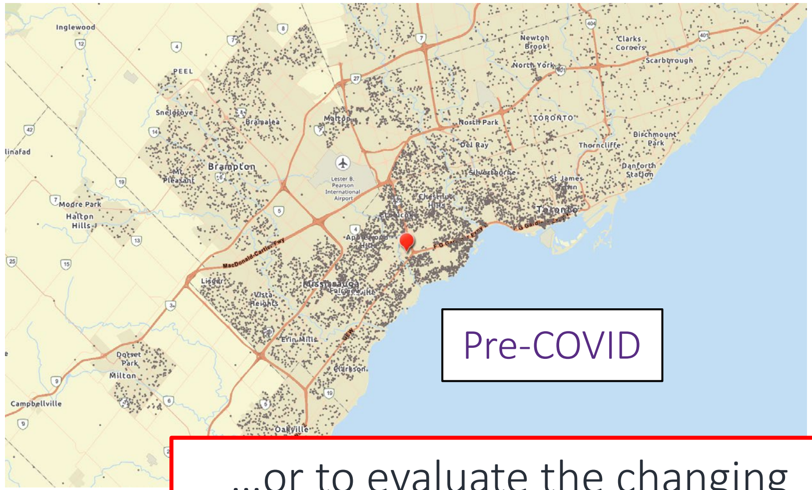
Trade Area Sizes Have Also Changed

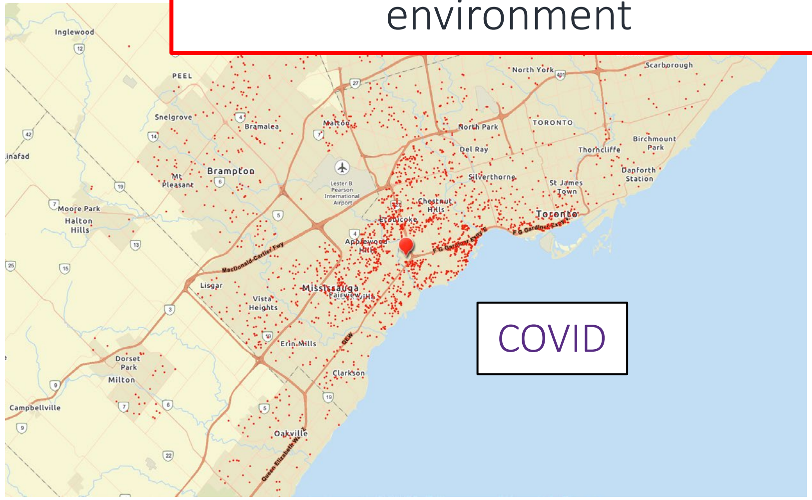
Understand Change in Trade Area Size

MobileScapes helps you map your visitors during a period of time…





…or to evaluate the changing environment



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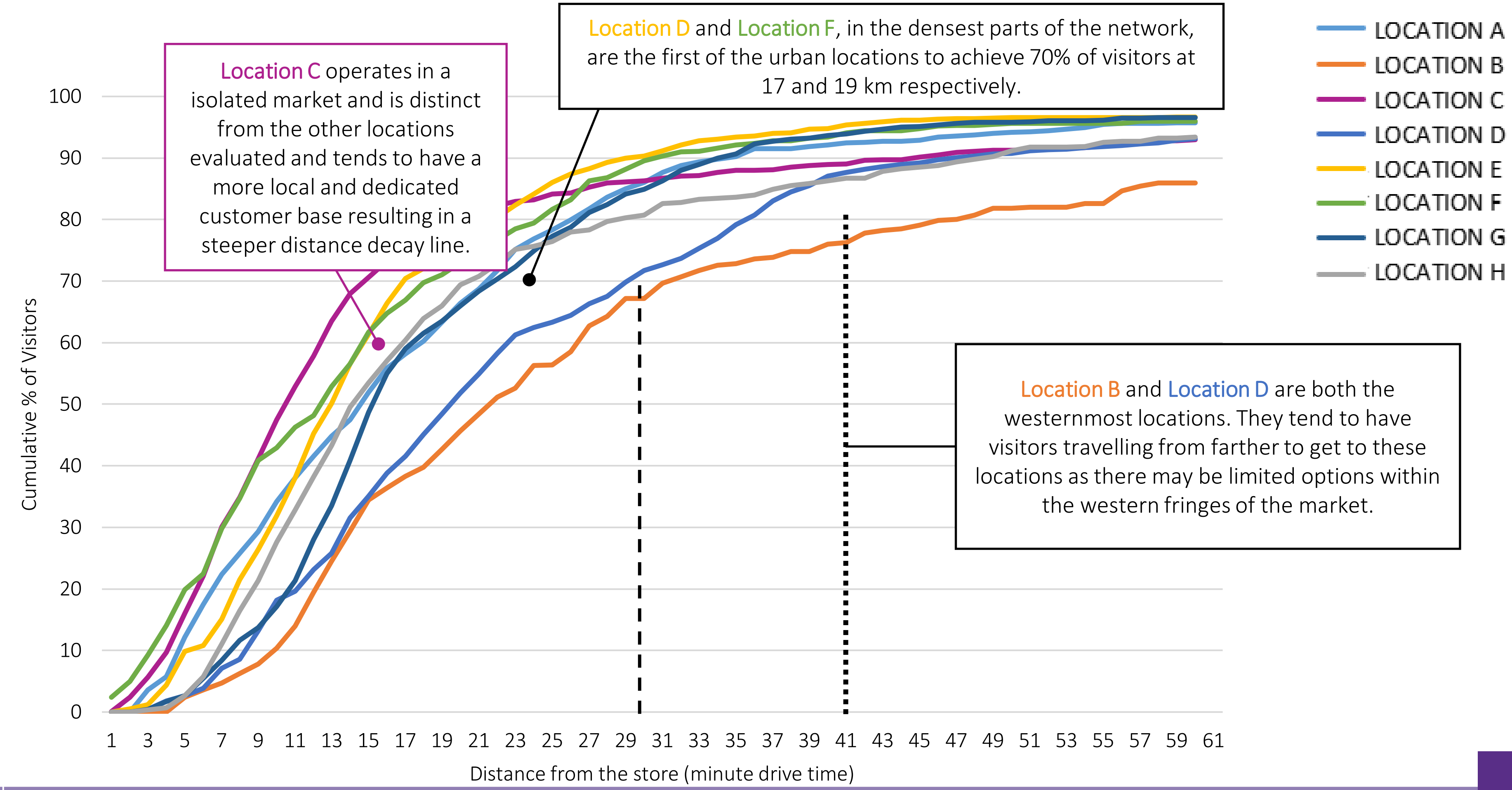
Understand Change in Travel Patterns by Store

Among this set of stores, three distinct ‘types’ of trade areas can be observed: isolated market, dense urban core and highway influence. Each trade area type has its own characteristics.



Cross-Shop in Own Network or Across Competitors

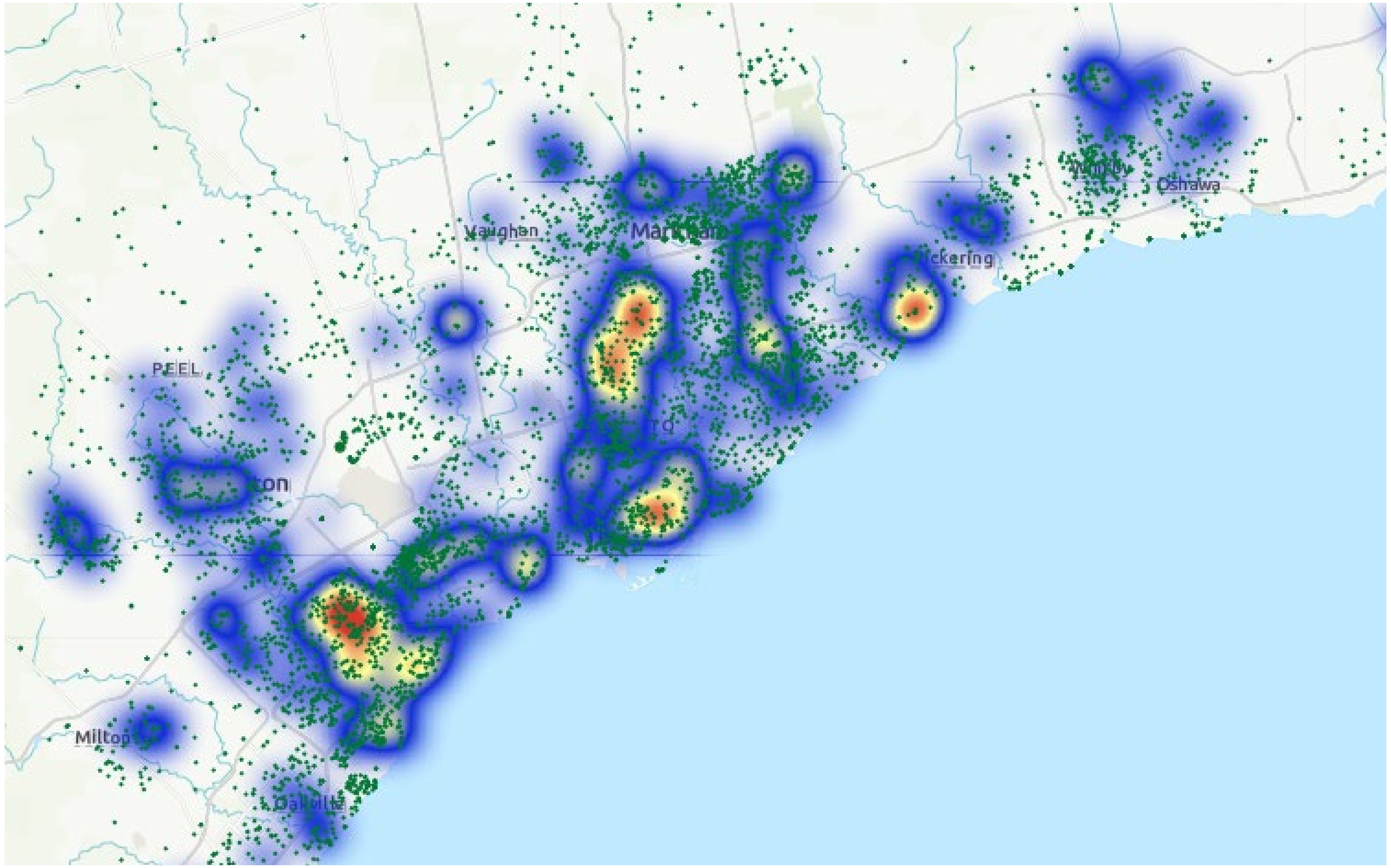
Own network for insight on:

- Ability to add stores
- Impact of relocations
- Conversion of store format

Competitors for insight on:

- Loyalists
- At risk consumer segments
- Identification of emerging shopper segments

Where is Cross-Shop Greatest?



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Cross-Shop Patterns

Store 3 is most at risk of losing customers to competitors at stores 5 – 8

	Banner Store 1	Banner Store 2	Banner Store 3	Competitor Location 4	Competitor Location 5	Competitor Location 6	Competitor Location 7	Competitor Location 8
Banner Store 1		4%	2%	5%	2%	4%	0%	2%
Banner Store 2	1%		0%	2%	1%	0%	0%	1%
Banner Store 3	3%	2%		1%	7%	5%	4%	6%
Competitor Location 4	7%	6%	1%		2%	2%	1%	2%
Competitor Location 5	1%	1%	3%	1%				
Competitor Location 6			1%	1%	1%			
Competitor Location 7			0%	1%	0%	0%		0%
Competitor Location 8	1%	1%	2%	1%	3%	1%	0%	
Total Exclusive Shoppers (only one location)	89%	90%	94%	92%	90%	89%	95%	90%
Total Non-Exclusive Shoppers (cross-shoppers)	11%	10%	6%	8%	10%	11%	5%	10%
Total Shoppers	100%	100%	100%	100%	100%	100%	100%	100%

Competitor Location 4 is stealing share from **Banner Store 1** and **Banner Store 2**

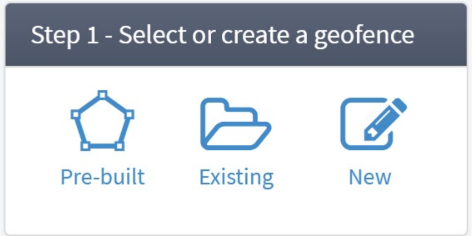
Banner Store 3 tends to have high cross shop with **Competitor Store 5, Competitor Store 6, AND Competitor Store 7**

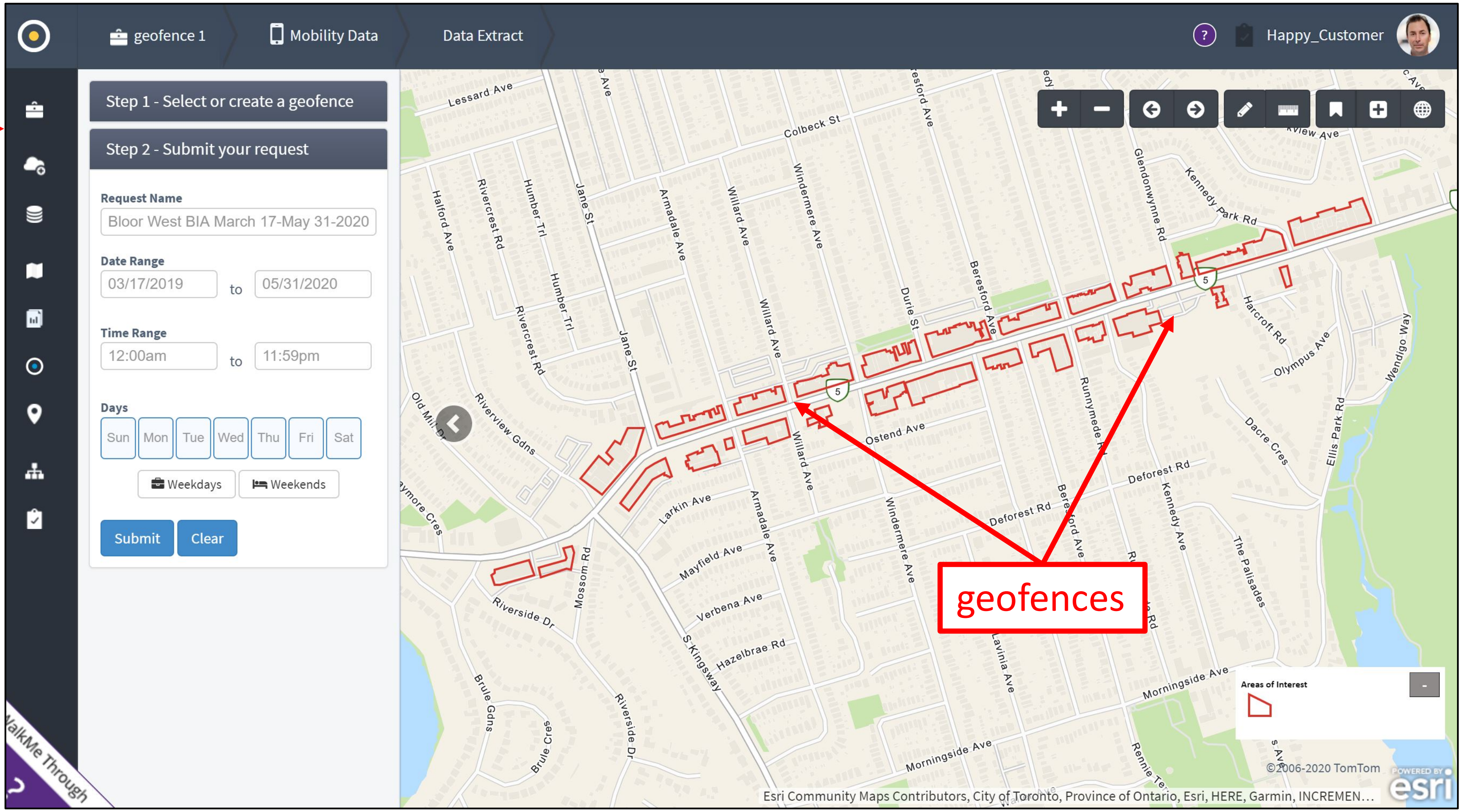
Source: MobileScapes 2020

Banner Level Analysis

Banners can evaluate changing shoppers habits and lifestyle types by time of day and day of week for operational and marketing efficiency

Geofence Library





100,000
Polygons

- Grocery
- Drug
- Mass Merchandisers
- Category Killers
- Malls
- Greenspaces
- Golf Courses
- Banks
- Credit Unions
- Auto Dealerships
- Coffee Shops
- Restaurants (QSR and Sit Down)
- Retailers

Non-Essential Businesses Experienced Significant Drop In Visits

	Essential: In Store Shopping	Essential: Curbside pick-up	Non-essential: closed & curbside pick-up (free-standing)
Calgary	- 37%	- 23%	- 69%
Toronto	- 37%	- 30%	- 88%

Geography: Calgary and Toronto Census Metropolitan Area (CMA)
Source: MobileScapes, Dec 2019/2020, Walmart, Home Depot, Lululemon

Note: All Walmart and Home Depot locations in CMA were aggregated, as were free-standing Lululemon stores

Weekend vs Weekday Change

	Walmart Weekday	Walmart Weekend	Home Depot Weekday	Home Depot Weekend	lululemon Weekday	lululemon Weekend
Calgary						
2019	68%	32%	71%	29%	69%	31%
2020	71%	29%	73%	27%	67%	33%
Toronto						
2019	68%	32%	71%	29%	67%	33%
2020	71%	29%	74%	26%	84%	16%

Geography: Calgary and Toronto Census Metropolitan Area (CMA)
Source: MobileScapes, Dec 2019/2020, Walmart, Home Depot, Lululemon

Note: All Walmart and Home Depot locations in CMA were aggregated, as were free-standing Lululemon stores

Market Potential – Online vs Offline Spend

Know your market potential – offline and online to understand performance to your category

ClickSpend™

ClickSpend™ *Powered by J.C. Williams Group* identifies which products consumers prefer to buy online vs offline.

- Allows comparisons of online market share to your own share in the same product category
- Identifies where to adjust merchandising mix for items that consumers prefer to buy in-store

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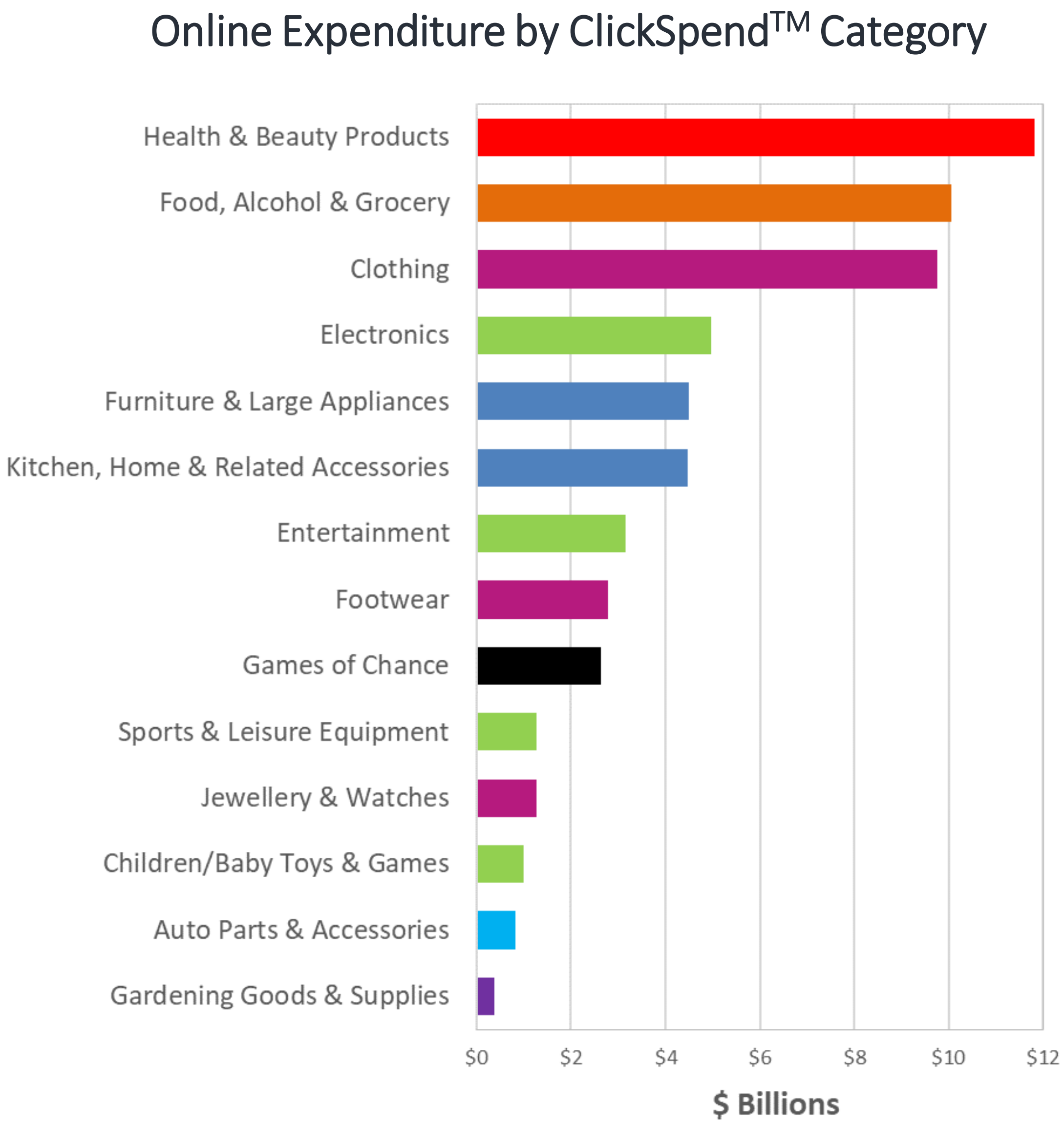
14 Major Categories

- Total expenditure is broken into 14 major consumption categories

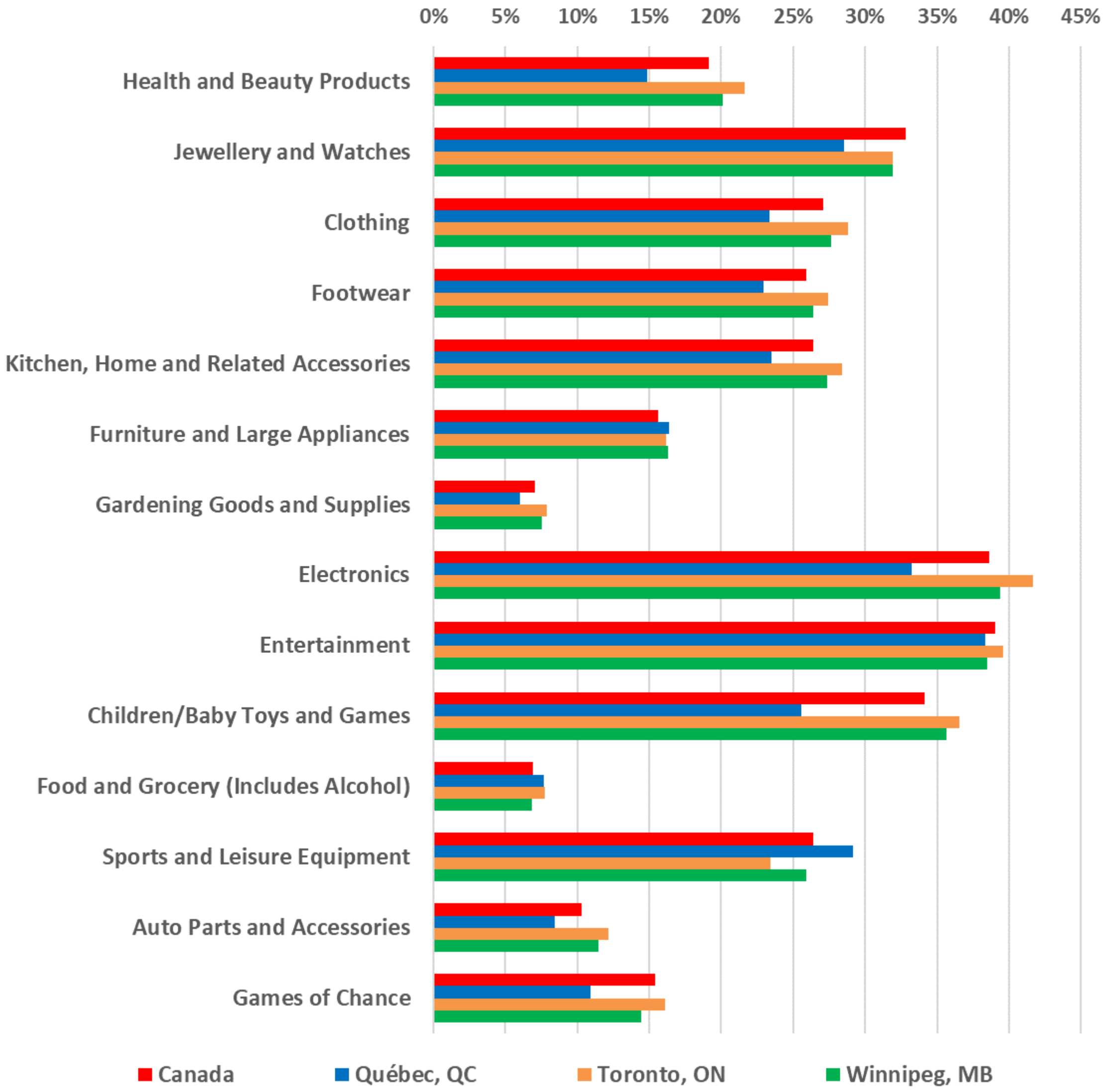
- Three estimates for each category:
  - Total expenditure
  - Online expenditure
  - Offline expenditure

- All estimates are for the "current year" (2020) and estimated at the postal code level



Comparing Contrasting Markets

% of Spend That is Online by Category



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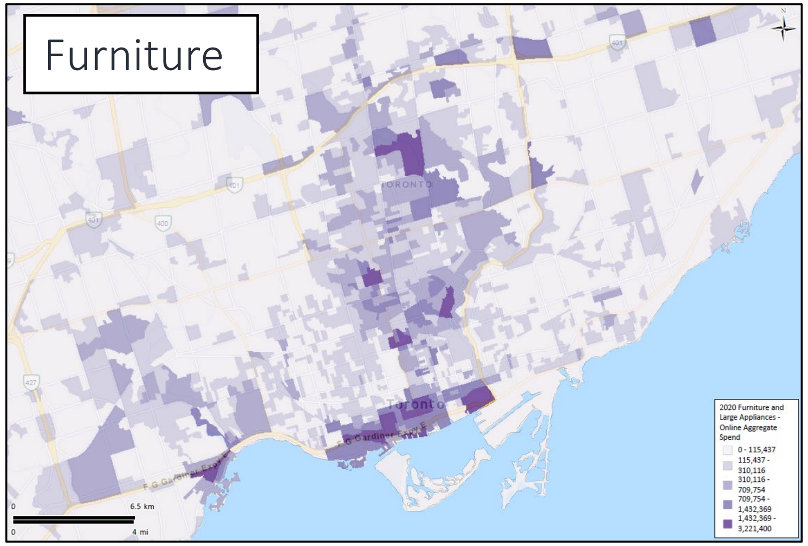
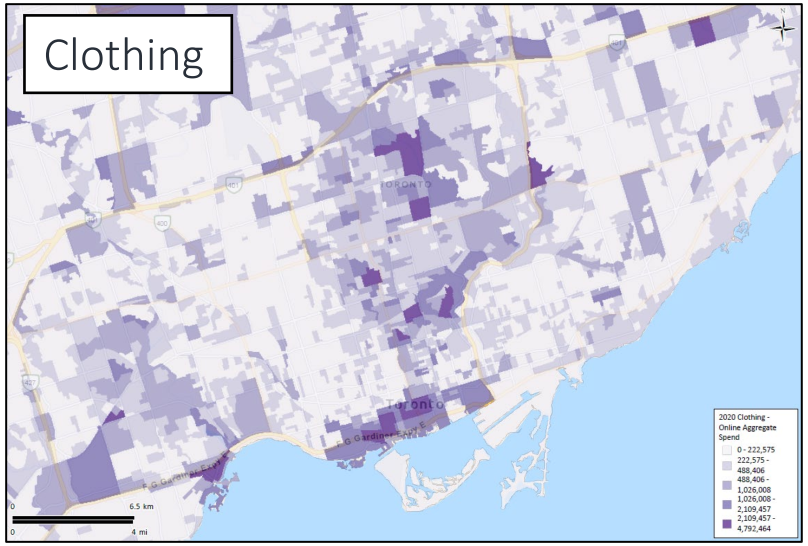
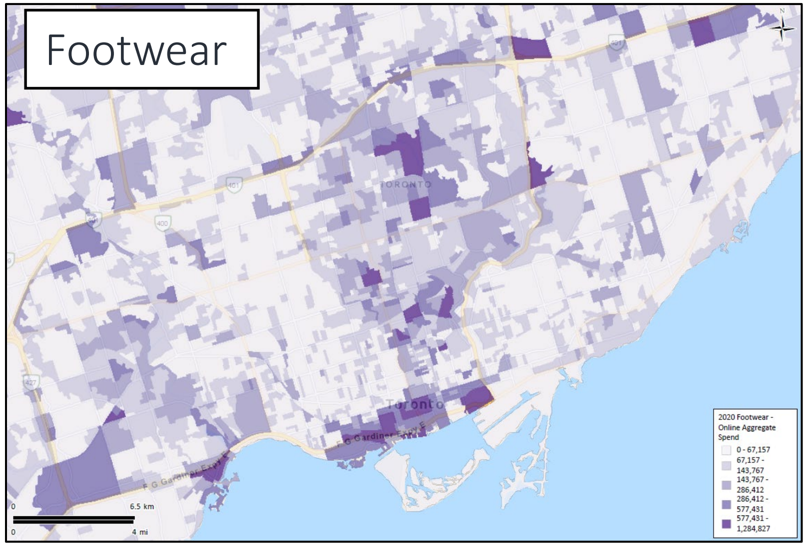
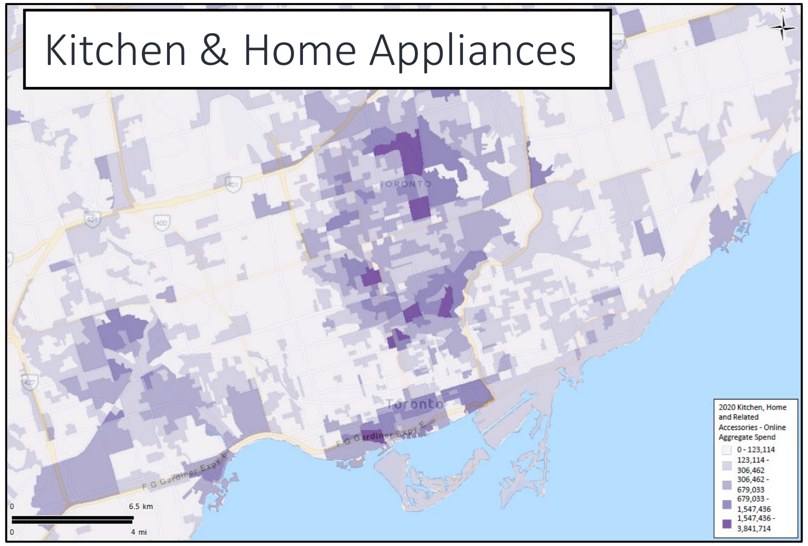
See Variation Across Categories Within a City









Aggregate spend online 2020 – for Toronto

ENVIRONICS ANALYTICS

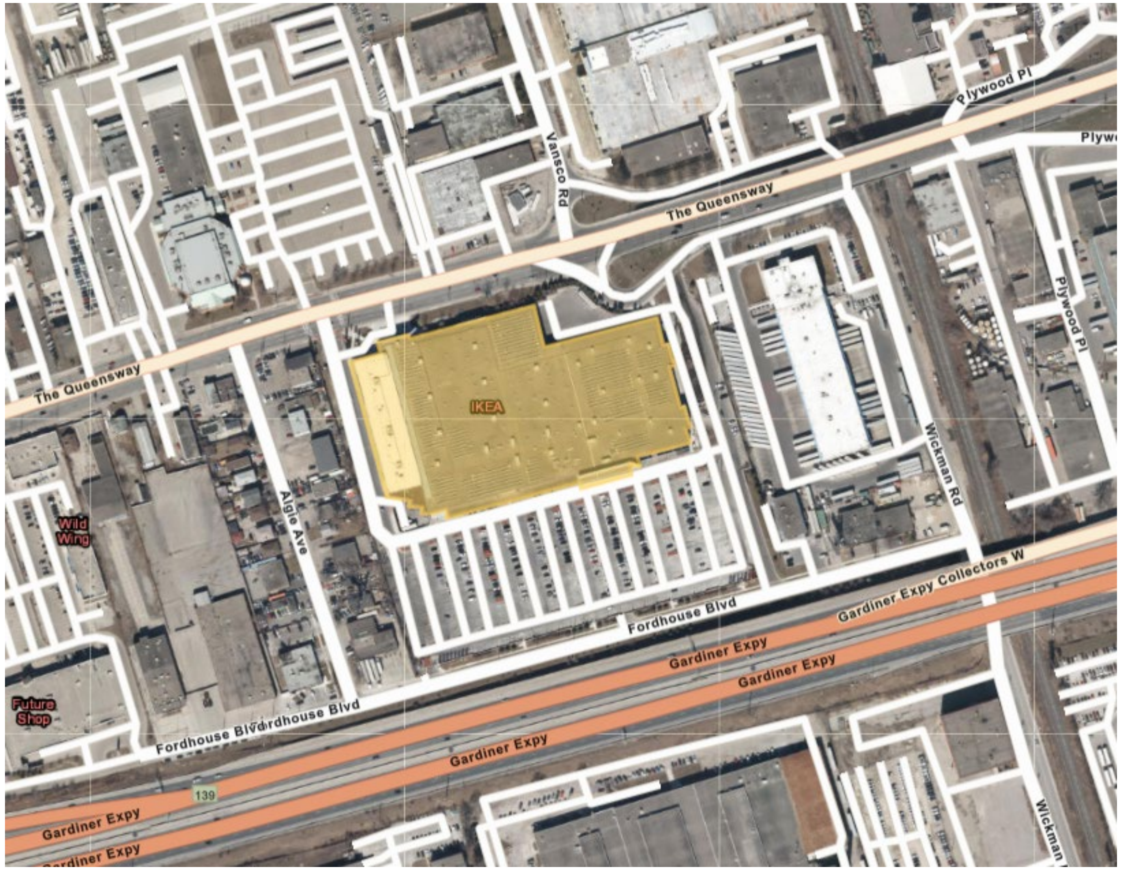
Local Market Evaluation – Toronto

Two banners, two different impacts

Store Level: Home Depot and IKEA

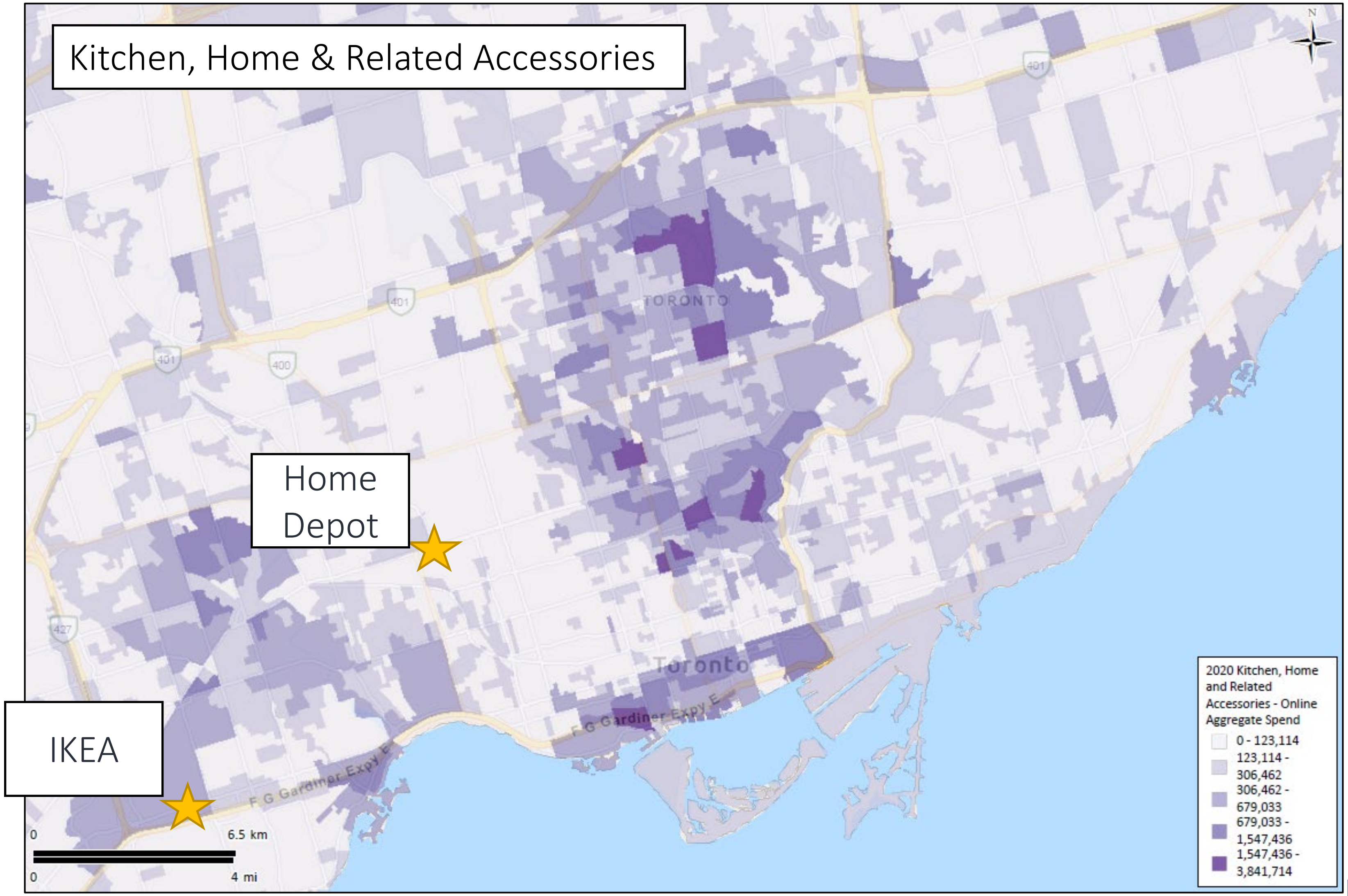
Home Depot

IKEA



ENVIRONICS ANALYTICS

Total Expenditure Online 2020 On Kitchen, Home



ENVIRONICS ANALYTICS

IKEA Experienced -88% Change in December

		Essential: Curbside pick-up		Non-essential: Curbside pick-up	
Total Change		- 30%		- 88%	
Weekday vs Weekend		Weekday	Weekend	Weekday	Weekend
	2019	71%	29%	61%	39%
	2020	78%	22%	80%	20%

Geography: Toronto Census Metropolitan Area (CMA)
Source: MobileScapes, Dec 2019/2020, Home Depot, IKEA

Home Depot: StockYards
IKEA: Etobicoke

ENVIRONICS ANALYTICS

Hours of Operation Should Be Considered

	Essential: Curbside pick-up 2019	Essential: Curbside pick-up 2020	Non-essential: Curbside pick-up 2019	Non-essential: Curbside pick-up 2020
Morning commute	7%	7%	3%	18%
Late morning	23%	24%	21%	20%
Midday	27%	24%	32%	24%
Evening commute	25%	22%	28%	16%
Evening	15%	21%	15%	14%

Geography: Toronto Census Metropolitan Area (CMA)
Source: MobileScapes, Dec 2019/2020, Home Depot, IKEA

Home Depot: StockYards
IKEA: Etobicoke

Trade Areas Increased in Size

	Essential: Curbside pick-up	Non-essential: Curbside pick-up
2019	20 mins	25 mins
2020	23 mins	29 mins

Geography: Toronto Census Metropolitan Area (CMA)
Source: MobileScapes, Dec 2019/2020, Home Depot, IKEA

Home Depot: StockYards
IKEA: Etobicoke

How Do You Capture Market Potential? Use Omnichannel Approach

Indieville is a classic urban hodgepodge: a mix of younger and middle-aged maintainers, singles and couples, and first- and second-generation Canadians. Drawn to the vibrant, urban core of the nation's big cities, a significant portion of these residents live in Toronto and nearly half are single, divorced or separated. This is a smart group: nearly 40 percent are university educated and members are twice as likely as average Canadians to hold master's degrees. But their average incomes—mostly from white-collar and service sector jobs in the arts, education and science—indicate that they're on the lower rungs of the career ladder. Half of all households are headed by maintainers under 45 years old, and residents typically live in older, low-rise apartments, duplexes and semi-detached dwellings. For many, Indieville is just the latest stop on an upwardly mobile journey; nearly 45 percent have moved in the last five years. Residents have a penchant for the latest technology and enjoy shopping online for books, music, fashion and groceries, all of which is not surprising given their age, education and high scores for Pursuit of Novelty.

Eat, Play, Love earned its name for its younger, mobile singles who patronize ethnic restaurants, participate in numerous sports and support the value Sexual Permissiveness. Concentrated in the urban core of Toronto, Montreal and Vancouver, this diverse segment reflects two important demographic trends—increasing urbanization and the growth of high-rise housing. Eat, Play, Love is a vertical world where almost 90 percent of residents live in apartment and condo buildings taller than five stories. It is also the most educated of all the segments: nearly 60 percent have a university degree, and one in five hold an advanced degree—more than double the national average. With their upper-middle incomes, they're earning good money for their age, typically from white-collar jobs in business, science, education and management. Two-thirds commute to work by public transit, biking or walking. Young and unencumbered—half of households contain single or divorced individuals—they travel widely and enjoy urban nightlife, going dancing and bar-hopping, hitting jazz concerts and attending food and wine shows. They're also into health and fitness, scoring high for aerobics, yoga and Pilates, as well as buying organic fruit and vegetables.

	% of Visits to Home Depot in Dec 2020	% of Visits to IKEA in Dec 2020	% Online Spend for Kitchen, Home & Related Accessories
Indieville	25%	6%	5%
Eat, Play, Love	12%	10%	9%

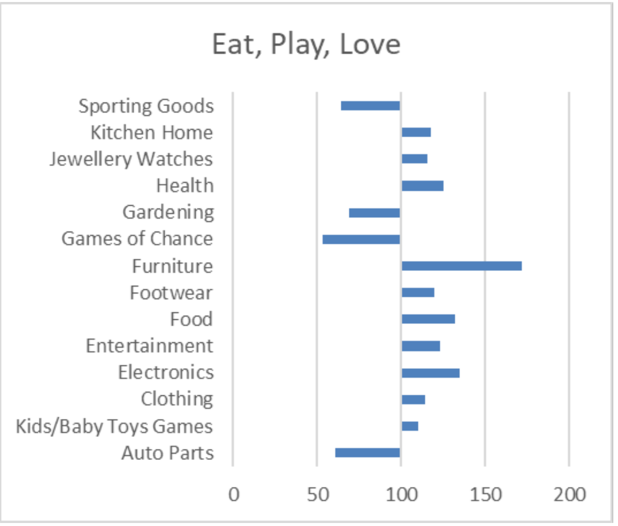
Geography: Toronto Census Metropolitan Area (CMA)
Source: MobileScapes, Dec 2020, Home Depot, IKEA

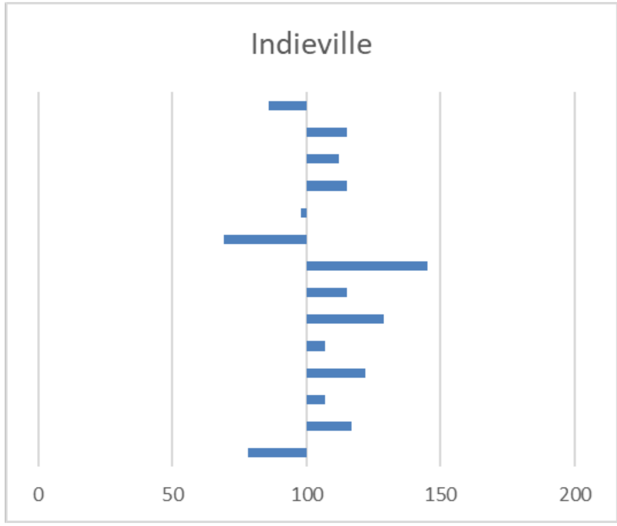
Home Depot: StockYards
IKEA: Etobicoke

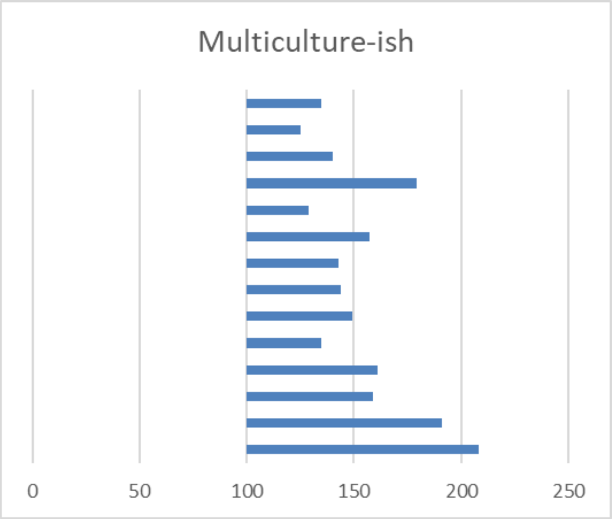
ENVIRONICS ANALYTICS

The Greatest Variance Is At Category Level

Avg Spend/ Household	$4,797	$4,541	$6,144







ENVIRONICS ANALYTICS

12 EAT, PLAY, LOVE

U3 YOUNG URBAN CORE

VERY YOUNG SINGLES & COUPLES Y1

Younger, well-educated urban singles

Demographics | Population & Households

ENVIRONICS ANALYTICS

Target Group: Eat, Play, Love (12)

POPULATION

633,707

HOUSEHOLDS

388,225

MEDIAN MAINTAINER AGE

41

Index: 76

MARITAL STATUS

45.6%

Index: 80

Married/Common-Law

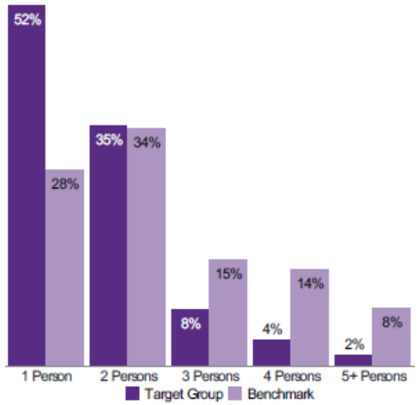
FAMILY STATUS*

63.0%

Index: 155

Couples Without Children At Home

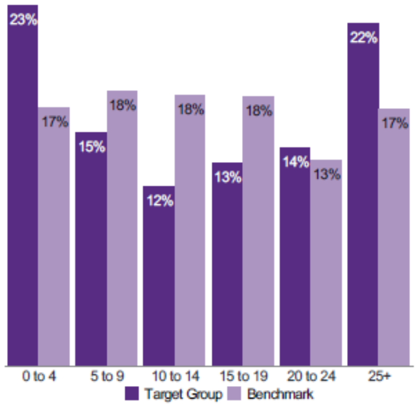
HOUSEHOLD SIZE



POPULATION BY AGE

	Count	%	Index
0 to 4	20,390	3.2	62
5 to 9	13,873	2.2	41
10 to 14	10,691	1.7	31
15 to 19	16,873	2.7	46
20 to 24	44,594	7.0	115
25 to 29	88,333	13.9	204
30 to 34	96,254	15.2	217
35 to 39	69,924	11.0	162
40 to 44	47,489	7.5	114
45 to 49	34,633	5.5	86
50 to 54	31,849	5.0	77
55 to 59	32,553	5.1	71
60 to 64	30,438	4.8	71
65 to 69	27,118	4.3	75
70 to 74	24,839	3.9	83
75 to 79	16,768	2.6	83
80 to 84	12,207	1.9	90
85+	14,882	2.3	105

AGE OF CHILDREN AT HOME



Benchmark: Canada

*Chosen from index ranking with minimum 5% composition

Index Colours:	<80	80 - 110	110+

12 EAT, PLAY, LOVE

U3 YOUNG URBAN CORE

VERY YOUNG SINGLES & COUPLES Y1

Younger, well-educated urban singles

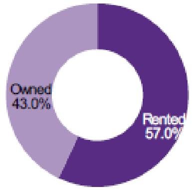
Demographics | Housing & Income

ENVIRONICS ANALYTICS

Target Group: Eat, Play, Love (12)

Population: 633,707 | **Households:** 388,225

TENURE



STRUCTURE TYPE

Houses

4.5%

Index: 7

Apartments

95.4%

Index: 280

AGE OF HOUSING*

4 - 9 Years Old

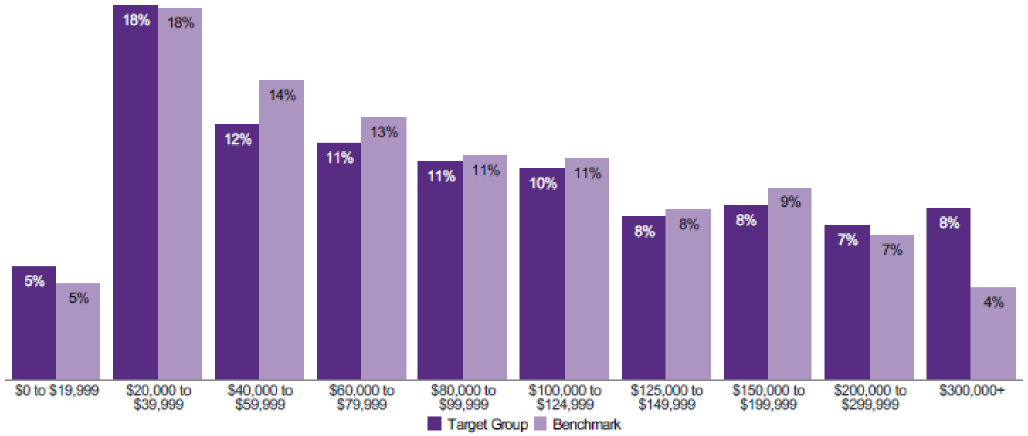
% Comp: 16.4 Index: 247

AVERAGE HOUSEHOLD INCOME

$120,866

Index: 116

HOUSEHOLD INCOME DISTRIBUTION



Benchmark: Canada

*Chosen from index ranking with minimum 5% composition

Index Colours:	<80	80 - 110	110+

ENVIRONICS ANALYTICS

12 EAT, PLAY, LOVE

U3 YOUNG URBAN CORE

VERY YOUNG SINGLES & COUPLES Y1

Younger, well-educated urban singles

Behavioural | Media Overview

ENVIRONICS ANALYTICS

Target Group: Eat, Play, Love (12)

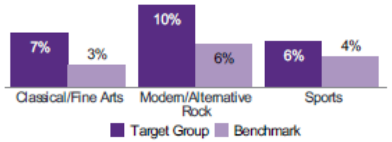
Household Population 12+: 581,519

RADIO

Listeners: 81.4%
Index: 96

12 Hours/Week*
Index: 86

Top Formats**

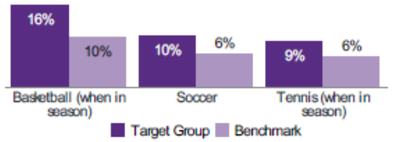


TELEVISION

Viewers: 85.0%
Index: 97

184 Minutes/Day*
Index: 95

Top Program Types**

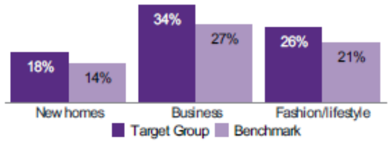


NEWSPAPER

Readers: 32.6%
Index: 117

1.5 Hours/Week*
Index: 150

Top Sections Read**

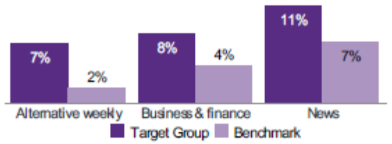


MAGAZINE

Readers: 20.6%
Index: 114

10 Minutes/Day*
Index: 112

Top Genres**

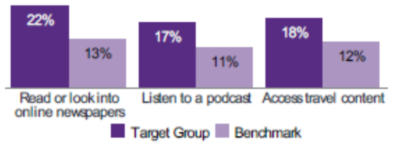


INTERNET

Users: 91.5%
Index: 105

245 Minutes/Day*
Index: 110

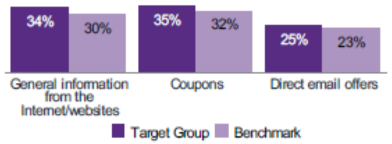
Top Activities**



DIRECT/OUTDOOR

12 Min/Day commuting one-way by car*
Index: 97

Top DM Formats Used**



Benchmark: Canada

*Consumption values based to Household Population 12+
**Chosen from index ranking with minimum 5% composition

Index Colours:	<80	80 - 110	110+

ENVIRONICS ANALYTICS

12 **EAT, PLAY, LOVE**

U3 YOUNG URBAN CORE | VERY YOUNG SINGLES & COUPLES Y1

Younger, well-educated urban singles

Opticks Social | Social Media Activities

ENVIRONICS ANALYTICS

Target Group : Eat, Play, Love (12)

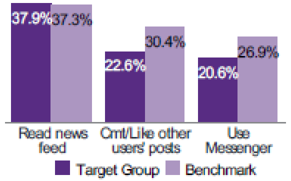
Household Population 18+: 566,138

FACEBOOK

76.6% currently use

Index: 95

Top Activities (Daily)

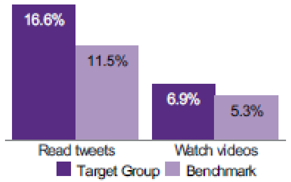


TWITTER

36.6% currently use

Index:138

Top Activities (Daily)

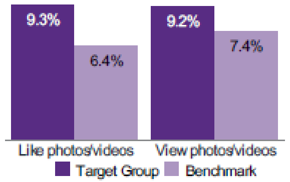


INSTAGRAM

50.4% currently use

Index: 143

Top Activities (Daily)

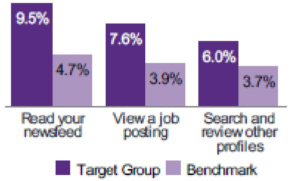


LINKEDIN

59.3% currently use

Index: 150

Top Activities (Weekly)

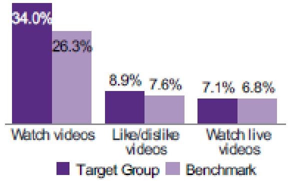


YOUTUBE

77.4% currently use

Index:112

Top Activities (Daily)

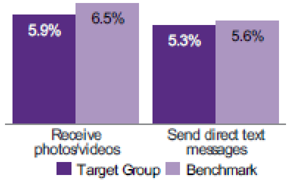


SNAPCHAT

14.1% currently use

Index: 109

Top Activities (Weekly)

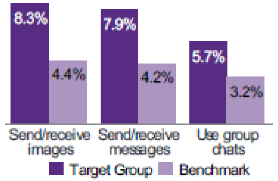


WHATSAPP

60.5% currently use

Index: 175

Top Activities (Daily)



Benchmark: Canada

Chosen and ranked by percent composition

(!)Indicates variables with low sample size. Please analyze with discretion

Index Colours:	<80	80 - 110	110+

ENVIRONICS ANALYTICS

12 EAT, PLAY, LOVE

U3 YOUNG URBAN CORE

VERY YOUNG SINGLES & COUPLES Y1

Younger, well-educated urban singles

Opticks Social | Social Media Attitudes

ENVIRONICS ANALYTICS

Target Group: Eat, Play, Love (12)

Household Population 18+: 566,138

DESCRIBES ME*...

Use SM to stay connected with personal contacts

% Comp 49.3 **Index** 103

I AM OPEN TO RECEIVING RELEVANT MARKETING MESSAGES THROUGH SOCIAL MEDIA CHANNELS

% Comp 26.4 **Index** 119

I WOULD BE MORE INCLINED TO PARTICIPATE IN SM IF I KNEW MY PERSONAL INFORMATION WOULD NOT BE OWNED/SHARED BY COMPANY

% Comp 70.0 **Index** 98

I AM VERY COMFORTABLE SHARING MY PERSONAL INFORMATION WITH SOCIAL MEDIA SITES

% Comp 13.1 **Index** 153

SOCIAL MEDIA COMPANIES SHOULD NOT BE ALLOWED TO OWN OR SHARE MY PERSONAL INFORMATION

% Comp 80.8 **Index** 96

SHARING MY PERSONAL INFO WITH FRIENDS/ACQUAINT. IN SM ENVIRONMENTS DOES NOT CONCERN ME

% Comp 24.0 **Index** 117

Benchmark: Canada

**Chosen and ranked by percent composition with a minimum of 5%*

Index Colours:	<80	80 - 110	110+

22 INDIEVILLE

U3 YOUNG URBAN CORE — YOUNGER SINGLES & COUPLES Y2

Younger and middle-aged urban singles and couples

Opticks Social | Social Media Activities

ENVIRONICS ANALYTICS

Target Group : Indieville (22)

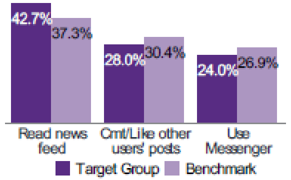
Household Population 18+: 438,155

FACEBOOK

76.9% currently use

Index: 96

Top Activities (Daily)

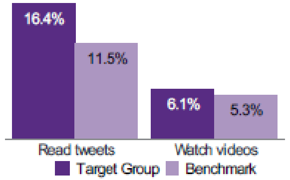


TWITTER

33.5% currently use

Index:126

Top Activities (Daily)

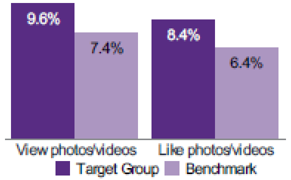


INSTAGRAM

42.5% currently use

Index: 121

Top Activities (Daily)

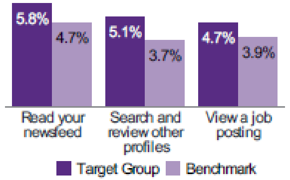


LINKEDIN

48.6% currently use

Index: 123

Top Activities (Weekly)

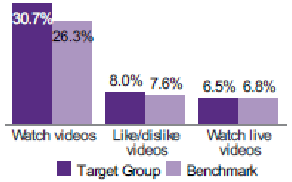


YOUTUBE

74.3% currently use

Index:108

Top Activities (Daily)

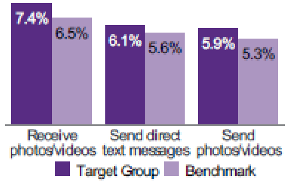


SNAPCHAT

14.3% currently use

Index: 110

Top Activities (Weekly)

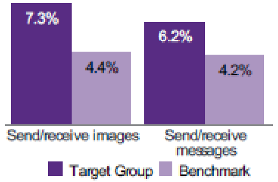


WHATSAPP

48.1% currently use

Index: 139

Top Activities (Daily)



Benchmark: Canada

Index Colours:	<80	80 - 110	110+

Chosen and ranked by percent composition

(!)Indicates variables with low sample size. Please analyze with discretion

Cross-Shop

How do you use cross-shopping to maximize opportunity?

ENVIRONICS ANALYTICS

Hudson's Bay at CF Sherway and Oshawa Centre

CF Sherway Gardens

Oshawa Centre

ENVIRONICS ANALYTICS

Unsurprisingly, the Extent of Lockdown by Region Impacts Stores Unevenly

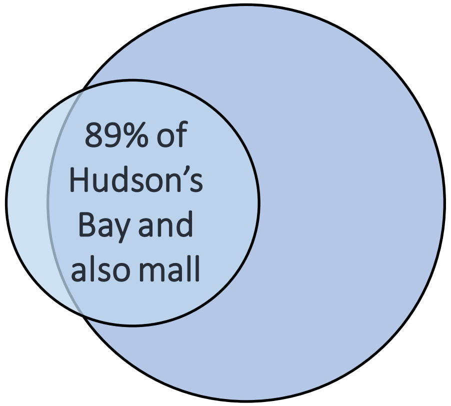
	HUDSON'S BAY CF Sherway Gardens (Toronto)	HUDSON'S BAY Oshawa Centre (Oshawa)
2020	68K visits	37K visits
2021	1K visits	10K visits
	-98%	-74%

Source: MobileScapes, Dec 2019/2020, Hudson's Bay at Sherway Gardens and Oshawa Centre

Cross-Shop Implications for Shopper Journey

February 2020

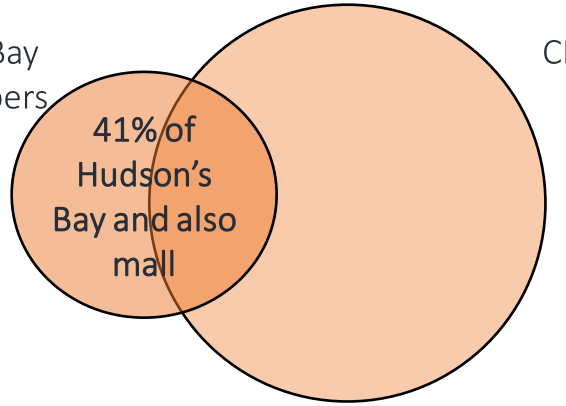
Hudson's Bay Only Shoppers (11%)



CF Sherway Gardens Only Shoppers (83%)

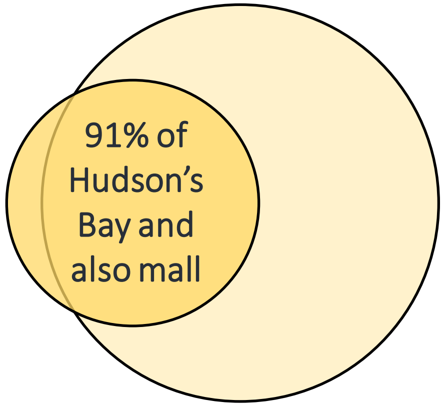
February 2021

Hudson's Bay Only Shoppers (59%)



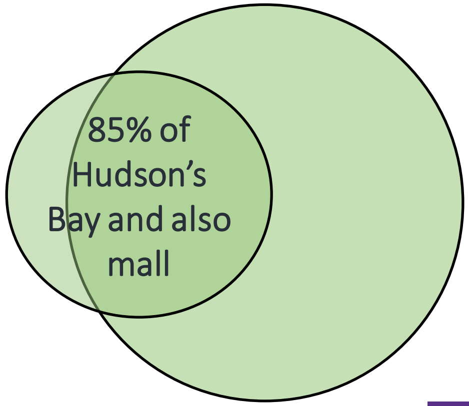
CF Sherway Gardens Only Shoppers (99%)

Hudson's Bay Only Shoppers (9%)



Oshawa Centre Only Shoppers (86%)

Hudson's Bay Only Shoppers (15%)



Oshawa Centre Only Shoppers (92%)

Source: MobileScapes, Feb 2020/2021, Hudson's Bay at Sherway Gardens and Oshawa Centre

ENVIRONICS ANALYTICS

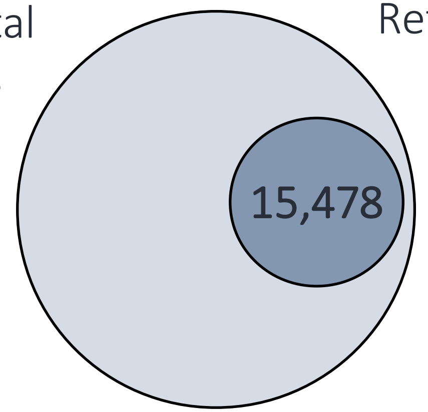
Relocation

When does relocation help you maximize your revenue?

How can you measure in advance?

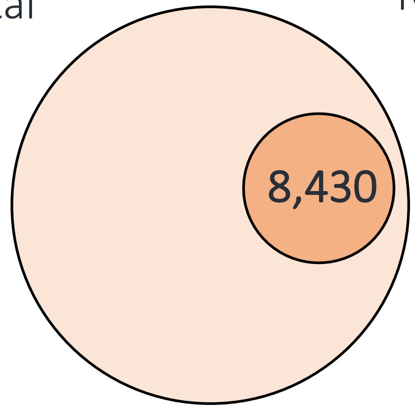
Estimated % of Total Mall Visitor Traffic From Each Location:

Mall 1 Total
105,988



Retailer in Mall 1 – Previous Location
15,478
(15%)

Mall 2 Total
48,897



Retailer in Mall 2 – New Location
8,430
(17%)

Transfer from Former to New Location:

Retailer in Mall 1 – Previous Location
15,478 total visitors

Retailer in Mall 2 – New Location
1,724 visitors (or 11%) with same device ID were also seen in 2020 at new location

ENVIRONICS ANALYTICS

Compare Lifestyle Types by Trade Area

Mall 1

Trade Area Households: **2,475,022**

PRIZM Segment		Trade Area Households	%	Index vs Toronto CMA
F1 03	Asian Sophisticates	167,604	6.8	189
F1 07	Mature & Secure	125,564	5.1	153
F2 10	Asian Achievement	186,664	7.5	219
F2 20	New Asian Heights	159,285	6.4	197
F3 31	Metro Melting Pot	326,174	13.2	112
U3 12	Eat, Play, Love	302,505	12.2	189
U3 22	Indieville	168,957	6.8	156
U4 61	Came From Away	263,201	10.6	113
	High Trade Area Segments	**1,699,954**	**68.7**	

Mall 2

Trade Area Households: **1,561,874**

PRIZM Segment		Trade Area Households	%	Index vs Toronto CMA
F1 03	Asian Sophisticates	189,220	12.1	339
F1 07	Mature & Secure	97,390	6.2	188
F2 10	Asian Achievement	187,517	12.0	348
F2 20	New Asian Heights	155,391	10.0	304
F3 31	Metro Melting Pot	225,078	14.4	123
U4 61	Came From Away	170,078	10.9	115
	High Trade Area Segments	**1,024,674**	**65.6**	

Evaluate Market Potential Trade-offs

	Average $/ Hhd in Trade Area		
	Mall 1	**Mall 2**	**Toronto CMA**
Boys (aged 4 to 14): Athletic footwear	$30	$26	$31
Boys (aged 4 to 14): Clothing	$92	$80	$98
Girls (aged 4 to 14): Athletic footwear	$21	$19	$21
Girls (aged 4 to 14): Clothing	$119	$106	$123
Men (aged 15 and over): Athletic footwear	$114	$114	$120
Men (aged 15 and over): Clothing	$749	$803	$810
Women (aged 15 and over): Athletic footwear	$100	$102	$103
Women (aged 15 and over): Clothing	$1,246	$1,278	$1,259

With a few noted exceptions, both trade areas score below the Toronto CMA *on average spend per household.*

ENVIRONICS ANALYTICS

Mobile Analytics and Data Analytics Drive Growth

Assess competitor impacts

Identify high opportunity neighbourhoods

Measure marketing performance

Overlay PRIZM – identify shopper profile

Optimize marketing displays to known audience

Size the prize - identify market potential

Tailor messaging and creative to relevant audiences

Analyze commute/travel patterns – home or work

Identify gaps and opportunities in customer profile

Compare performance to market

Assess employment/daytime populations

ENVIRONICS ANALYTICS

Summary and Questions?

- Navigate changing consumer through unprecedented change
- Evaluate store performance and build market share
- Evaluate real estate decisions: relocations, expansions, competitive impacts
- Evaluate marketing decisions: media preferences by lifestyle to market effectively

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Stephanie.McIsaac@environicsanalytics.com

ENVIRONICS ANALYTICS