PRESENTATION

PLAN FOR THE NEXT 20 MINUTES

• Topic: Sponsorship & COVID

• PART 1: A Bit from 2019’s “Glory Days” (what we hope to return to)
  • Canadian Sponsorship Landscape Study, 13th Edition (Pre-COVID)

• PART 2: SPX COVID Studies
  • SponsorshipX Surveys – 4 Rounds: April, May, June, September 2020
  • Industry Expert Input – June 2020
  • Author Experiences/POV
“Glory Days”

13th Annual CSLS
13th ANNUAL

CSLS

CANADIAN SPONSORSHIP LANDSCAPE STUDY

Lead Author: DR. NORM O’REILLY
Results Highlights

13th Annual - Full reports at www.sponsorshiplandscape.ca

Smarter? | Activation, Measurement and Servicing
Balanced? | Rights Fee Spend vs. Activation
Bigger? | The Big Players Assert Themselves, Return of Bias
More Advanced? | Gender, Agencies, Objectives
After going online in 2010, number of respondents continually declined until a survey redesign in 2016.
Among those organizations that use sponsorship, about 1 in 4 marcom $’s are spent on sponsorship.
Historical Canadian Sponsorship Industry Size: Rights Fees

CAGR of 3.78%.

$1.80B
2018 Rights Fee Spend

NOTE

DATA
Historically, activation spend has fluctuated considerably more than rights fee spend, but it has increased more relatively than rights fees. The CAGR of total activation spend is 7.49%.

0.68
Activation to Rights Fee in 2018

Historically, activation spend has fluctuated considerably more than rights fee spend, but it has increased more relatively than rights fees.
Historical Canadian Sponsorship Industry Size: Total

- 2006: $0.48
- 2007: $1.11
- 2008: $1.59
- 2009: $1.59
- 2010: $0.91
- 2011: $1.59
- 2012: $1.11
- 2013: $1.11
- 2014: $0.91
- 2015: $0.48
- 2016: $1.59
- 2017: $1.80

CAGR of rights fees plus activation spend is 5.06%.

$3.02B in Total Industry Spend
### Criteria in Decision-Making: Sponsors

<table>
<thead>
<tr>
<th>Criteria</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consumer Passions</td>
<td>1.8%</td>
<td>9.4%</td>
<td>9.3%</td>
</tr>
<tr>
<td>Industry Trends</td>
<td>9.4%</td>
<td>9.2%</td>
<td>17.9%</td>
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<tr>
<td>Asset Assessment</td>
<td>3.3%</td>
<td>4.4%</td>
<td>13.6%</td>
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<tr>
<td>Internal Data/Analysis</td>
<td>10.3%</td>
<td>9.2%</td>
<td>16.1%</td>
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<tr>
<td>Competitor Activity</td>
<td>4.4%</td>
<td>10.8%</td>
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<tr>
<td>Bias</td>
<td>21.7%</td>
<td>32.9%</td>
<td>20.1%</td>
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</table>

### Criteria in Decision-Making: Agencies on Sponsors Behalf

<table>
<thead>
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<th>2016</th>
<th>2017</th>
<th>2018</th>
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<td>Consumer Passions</td>
<td>1.8%</td>
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<td>9.4%</td>
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<td>14.77%</td>
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<tr>
<td>Asset Assessment</td>
<td>10.8%</td>
<td>13.8%</td>
<td>10.11%</td>
</tr>
<tr>
<td>Internal Data/Analysis</td>
<td>17.9%</td>
<td>14.77%</td>
<td>11.8%</td>
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<tr>
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<td>10.8%</td>
<td>11.8%</td>
<td>17.77%</td>
</tr>
<tr>
<td>Bias</td>
<td>21.1%</td>
<td>17.77%</td>
<td>17.77%</td>
</tr>
<tr>
<td>Other</td>
<td>10.3%</td>
<td>10.8%</td>
<td>31.7%</td>
</tr>
</tbody>
</table>

**DATA**

Majority of decisions are about the right factors.

**NOTE ON 2018**

Sponsors report ‘bias’ bounce back but agencies disagree and report very high “consumer passions”
LARGEST SPONSORSHIP CATEGORY

56% Pro Sport

23% Amateur Sport

22% Arts

DATA

Triple

The size of largest investments in pro sport versus those in amateur sport or the arts

Average Size of Largest Annual Deal: $1.1M

NOTE Pro Sport: $1.9M
**PROPERTY MIX**

**Historical Sponsorship Investment by Property Type**

- **Percentage of Investment**
  - 0%
  - 12%
  - 24%
  - 36%
  - 48%
  - 60%

- **Years**
  - 2006
  - 2007
  - 2008
  - 2009
  - 2010
  - 2011
  - 2012
  - 2013
  - 2014
  - 2015
  - 2016
  - 2017
  - 2018

**Pro Sport**
- 2018: 55.1%
- Significant shift in 2018 over previous years

**DATA**
- 55.1% of Investment is in Pro Sport

**NOTE**
- Significant shift in 2018 over previous years
SPONSOR INVESTMENT: PROPERTY REACH

13-YR AVG | 2018 DATA

“Go Big or Stay Local”

9.6% | 11.8%
International

17.2% | 7.5%
Provincial

33.8% | 36.2%
National

16.2% | 10.4%
Regional

10.3% | 20.4%
Multi-Provincial

11.9% | 13.7%
Local

13-YR AVG | 2018 DATA

“Go Big or Stay Local”

9.6% | 11.8%
International

17.2% | 7.5%
Provincial

33.8% | 36.2%
National

16.2% | 10.4%
Regional

10.3% | 20.4%
Multi-Provincial

11.9% | 13.7%
Local
**ACTIVATION: RATIO**

**Historical Activation Ratio: Canada**

The highest recorded number since 2012.

0.68

Activation to Rights Fee in Canada.
Historical Activation Ratio: Canada & US

Although improved in 2018, the activation ratio in the US in more than 3X higher than in Canada.
**ACTIVATION: DRIVERS OF ROI - SPONSOR VIEW**

1. Hosting/Hospitality
2. Product Sampling
3. Advertising
4. Athletes
5. Social Media
6. Branded Content
7. Public Relations
8. Sales/Consumer Promotions

**DATA**

Shift

Changing of views in 2018 over 2017
**MEASUREMENT IS COSTING US SLEEP**

<table>
<thead>
<tr>
<th>Year</th>
<th>Meeting Targets</th>
<th>Demonstrating ROI</th>
<th>Demonstrating ROI</th>
<th>Other</th>
<th>Demonstrating ROI</th>
<th>Demonstrating ROI</th>
<th>Meeting Targets Evaluation/Measure</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>2013</td>
<td>2014</td>
<td>2015</td>
<td>2016</td>
<td>2017</td>
<td>2018</td>
<td></td>
</tr>
</tbody>
</table>

- Sponsor
  - “How to measure ROI on my sponsorship investments.”
  - “Determining the value of social and digital benefits.”

- Property
  - “Delivering on the promised benefits”

- Agency
  - “How to measure its effectiveness.”
  - “Demonstrating sufficient ROI to prospects and clients.”

*Demonstrating ROI #2
**Demonstrating ROI #3
SponsorshipX C-19

INSIGHTS FROM SPONSORSHIPX SURVEYS
SPONSORSHIP IS STILL HURTING BUT IMPROVING
ONGOING INSIGHTS FROM EXPERTS

Four versions of the survey

- 627 responses total in April (n=289), May (n=201), June (n=76), and September (n=57)
- Reflective commentary from 10 global executives (May)
SPONSORSHIP IS DOWN BUT NOT OUT
ROUND #1: APRIL 24TH

ROUND #2: MAY 28TH
ROUND #3: JUNE 25TH

ROUND #4: SEPT 10TH
KEY LEARNINGS
FROM ROUNDS 1, 2 & 3

From the Survey Data

• April and May: shifting their focus to COVID-19 relief, front line workers, food insecurity and mental health.

• June: added focus of social injustice and growing concern for economy.

• Major reduction in their sponsorship investments, revenues and billings.

• Return to normalcy progressively later with segmented views.

• Esports an alternative only (for the most part) for those already in esports.

• Caution advised around pivoting. Build virtual events/exhibitions where possible.

• For small properties, best approach is to plan, prepare, save and invest.

• Rights fees will do down 50%+ without fans in venue.
KEY LEARNINGS FROM ROUND 2

From the Sponsorship Industry Executives

- “Sponsorship will be back before fans will be back in venues”
- “Expect a big return when sport comes back” and, for some, there is already a “Silver lining”
- “Avoid choosing a theme of the season”, “Don’t try to be clever”, and “Only pivot if it makes sense long term”
- “Properties need to pivot as well” and “Agencies must be true partners”
- “Thoughtful non-endemic sponsorship in esports can work”
- “Brand KPI’s should be the focus of sponsorship efforts”

A Misnomer to Clean Up

“To say that sport with no fans on site is ‘fanless’, we’ve got a misnomer. To say there are no fans is not accurate. It should be no fans on site. For some properties, partners will have access to thousands, if not millions, of fans via liner and digital channels.”

Stacey Allaster
Chief Executive, Professional Tennis, USTA
KEY LEARNINGS
FROM ROUNDS 1, 2 & 3

From our Research

- Mindsets Matter - from physical well-being of ourselves to that of others to emotional well-being to the return of the virus to fear of economic ruin.
- Mindsets Differ - people segment up and have differing views.
- Pandemics and who they work.
- Pivoting - working for hotels, restaurants, digital retailers, but not for everyone.
- What is working?
  - Live Unique Online Viewing/Interactive Experiences
  - Professional Sport Bubbles (but with reduced sponsorship)
  - Focused Entrepreneurship
“NORMALCY”
NORMALCY

Ongoing Pessimistic/Realistic Shift

R1: April Sept 2020
R2: May Sept 2020
R3: June Jan 2021
R4: September Sept 2021

R4: 2ND MOST POPULAR - APRIL 2021, THEN JUNE 2021
WHY SEPTEMBER 2021?

Most Common Theme: Live Event Return

“This is when I feel spectators / attendees will be returning to sporting events, festivals, etc.”

“So long as physical gatherings are limited in scope or size, or people continue to perceive them as dangerous, the ripple effects of spending will be felt in all aspects of business, including sponsorship.”

“There still has not been a vaccine in place that is widely available. Dr. Fauci has said that he is hopeful for a vaccine in early 2021. But once that vaccine is available - how hard will it be to get it?”

#2 Theme: Vaccine

#3 Theme: 2nd Wave Certainty

“Malgré les efforts de tous, on se prépare pour une deuxième vague qui peut durer encore une paire de mois.”

n=57
SPONSORSHIP
BUDGETS
SLASHED
FORECASTS FOR REDUCTION IN RIGHTS FEES INVESTMENT, REVENUES OR BILLINGS EXPECTED FOR 2020

Shifts Since June

Sponsors - Significant drop
Properties - Significant drop
Agencies - Modest improvement

Note: Red Font are Results from Rounds #1, #2, and #3
FORECASTS FOR REDUCTION IN PLANNED ACTIVATION SPEND BY SPONSOR EXPECTED FOR 2020

Shifts Since June

Sponsors - Modest improvement
Properties - Modest drop
Agencies - Drop

Note: Red Font are Results from Rounds #1, #2, and #3
“Look at the world through a different lens. Think of new, innovative ways to reach fans and deploy resources. Use this moment to take risks, and try new ways to connect.”

“Moving activation/hospitality $’s to net new assets, notably digital programs or branded content.”

“Re-opening conversations; high level planning on new assets for sponsor involvement.”

“Understand pivots from physical to virtual…Re-define consumer interactions in a COVID environment - what are key KPIs and how to we re-look at ROI?”

#2 Theme: Replace Hospitality Based Sponsorship Activities

#3 Theme: Complete Paradigm Shift

#4 Theme: Re-Define Exclusivity Windows and ROI

Most Common Theme: Build Creative Sponsorship Assets

RECOMMENDATIONS FOR A REBOOT

n=57
BEST PROPERTY PIVOT
WHO HAS DONE IT WELL?

Only Two Identified More Than Once:

- NHL/NBA Bubbles (n=47).
- PGA/golf (n=5).
BEST SPONSOR PIVOT
WHO HAS DONE IT WELL?

Top Answer: Nike

“Nike created timely content (COVID, BLM), empowered athletes/ambassadors to use their platforms for good. Taken a leadership role (that reflects their market position).”

“Nike (and other sports apparel companies) have managed this well by shifting their messaging.”

“Nike: focusing on community.”

“They have used the pandemic as a means of extending their brand purpose story.”
HOW SHOULD PROPERTIES REBOOT?
IN YOUR OPINION, WHAT SHOULD PROPERTIES DO IN RESPONSE TO COVID-19?

Most Common Theme: A Long-Term Collaborative Stakeholder Approach

“Work in partnership with sponsors, rather than looking out for their bottom line. Deliver value that's mutually beneficial.”

“Maintain relationships with their sponsors, work to find alternatives, understand that budgets and being cut and sponsors and trying to find new and cost effective ways to connect with their target audience safely.”

#2 Theme: Direct Communication

#3 Theme: Build Innovative New Ways to Reach your Fans, Participants and Followers

“Find creative ways to bring replacement value to partners in the short-term while thinking about how over-delivering on value and objectives in 2021.”

#4 Theme: Don’t Go Back to Old Habits

“Don't fall back to standard digital, social, or broadcasts assets that you have leftover on the shelf. Work with your sponsors and their agencies to create unique content, content, and experiences.”

n=57
SPONSORSHIP ASSETS
POST-COVID
CAN YOU THINK OF ANY ASSETS AND/OR ASSET PLATFORMS ADDED DURING COVID-19 THAT WILL STILL BE RELEVANT AFTER COVID-19 PASSES?

“TikTok. More personable assets vs. Mass approach.”

“Enhance online presence capabilities e.g. Drive Ins for film and live music; broader access to entertainment through digital platforms.”

“All of the virtual and ship swag to folks’ homes stuff.”

“Virtual signage - whole new source of revenue stream that's only just scratching the surface.”

“Online conferences/webinar series will stay. Much cheaper to run.”

Note: many answers like this

“Streaming. Video conferencing. Delivery services.”

“Touchless registration, synchronous live streaming of events, with exclusivity heightened for the in person participants - you can charge a LOT more for those precious seats.”

n=57
RECOMMENDATIONS TO SPONSORS FOR Q4 2020 FOCUS
TOP SPONSOR PRIORITY FOR Q4 2020

All respondents (n=57) provided a response, which grouped into the following themes.

- Planning for 2021
- Work collaboratively with properties on new assets, creative activations and safety
- Focus content on important topics: social injustice, US election, mental health
- Build social and digital inventory
SAFETY IN Q4
AS YOU CONSIDER OUTDOOR/ONSITE ACTIVATIONS THIS FALL, HOW CONCERNED ARE YOU ABOUT THE SAFETY OF YOUR ATTENDEES?

All respondents (n=57) provided a response, which grouped into the following themes.

- Extreme Concern Related to Safety
- Not Relevant in Jurisdiction as Not Allowed
- Extreme Concern Related to Brand Risk
EXPERT COMMENTARY
EXPERT COMMENTARY

Sponsorship Normalcy can Happen before Fans are Back in Venues

Robert Zitzmann
Managing Partner, Jung von Matt/SPORTS
EXPERT COMMENTARY

Expecting a Big Return

Steve Tseng
Executive Vice President, Pac-12 Networks
EXPERT COMMENTARY

Choosing a “Theme of the Season” is Not Good Marketing

Matthew Leopold
Head of Brand, PR and Content Marketing, LexisNexis UK
EXPERT COMMENTARY

Properties Need to Pivot

Stacey Allaster
Chief Executive, Professional Tennis, USTA
EXPERT COMMENTARY

Silver Lining

Giulia Zecchini
Commercial Business Intelligence Manager, Formula 1
EXPERT COMMENTARY

Agencies must Pivot with Agility and as True Partners

Ian Malcolm
President & CEO, Lumency
EXPERT COMMENTARY

Thoughtful Non-Endemic Sponsorship in Esports Can Work

John Pierce
Partner, Player 2 Studios
EXPERT COMMENTARY

Don’t Force Something to be Clever

Bruce Bundrant
CEO & Founder, Riviera Sports Marketing
EXPERT COMMENTARY

No such thing as fanless sport

Stacey Allaster
Chief Executive, Professional Tennis, USTA
EXPERT COMMENTARY

Major Professional Team Sport will be Back Soon but at What Cost?

Luxury boxes, club seats, in-stadium advertising and sponsorship fare are premium.

Robert Boland
Athletics Integrity Officer, Penn State University
EXPERT COMMENTARY

Pivot with your partners and your assets

‘We Are All #Team Canada’

Jacquie Ryan
CMO, Canadian Olympic Committee
Summary
FINAL THOUGHTS
1. Sponsorship has been hit hard. It is not getting better. It will be a while…

2. Sponsorship is not tied to live events having fans.

3. We have learned a lot about what to do. Invest in that.

4. Take a “re-boot” philosophy. Don’t go back.

5. There are opportunities and great examples to adopt and/or follow.
THIS WILL END...

Thank you.
How the Sponsorship Industry Can Build Brands and Engage Audiences from a Distance
Some Questions We Can Help Answer

- Which Personas are most relevant within my trade area or market?
- Who are my best target customers/donors?
- How has the PRIZM profile of my customers/donors changed pre versus post-COVID-19? And does that change my partnerships?
- What are the best channels to reach my different Personas?
- Where do I have new and emerging sponsorship opportunities?
About Environics Analytics

**ACTIONABLE DATABASES**
- High-quality databases
  - Over 30,000 data points
  - Postal Code Level data
  - National coverage
  - 360-degree view of customers
  - Privacy compliant

**ANALYTICS EXPERTISE**
- Experience and expertise
  - Customer profiling
  - Segmentation
  - Data mining
  - Site modeling
  - Predictive and
  - Custom analytics

**ACCESSIBLE OPTIONS**
- Flexible delivery options
  - Data licensing
  - Cloud-based analytics platforms
  - Project work
  - Analytics consulting and custom services
How We Make Data Usable

120+ data sources
83 in Canada and 44 in the US

Demographic
Psychographic
Behavioural
Segmentation
Financial
Health
Mobile Analytics

Our data is privacy compliant and is created with over 100 data sources and partners at the postal/zip code level across North America.

- Who is your audience?
- What defines them by demographics?
- Where are they and where can we find more likeminded people?
- What do they do in their spare time, aside from attending your events?
- How much disposable income do they spend and on which categories ie. Healthcare, automobile, fitness, telco.
- What kind of media do they consume and how can I reach them and other potential new fans/donors?
- What media channels will produce the greatest ROI in new fan/donor acquisition?
- How does your audience use social media?
- +30,000 more

800,000 postal codes
67,000,000 Zip+4
30,000 data points
Privacy Compliant Data Products

Demographic
- CensusPlus
- DemoStats
- DaytimePop
- CrimeStats
- AccultuRates

Segmentation
- PRIZM NEW
- PRIZM QC
- DELTA
- PRIZM5 Spectra

Mobile Analytics
- Mobile Movement NEW

Psychographic
- SocialValues

Mobile
- WealthCare
- WealthCare New
- Vulnerability Index NEW

Financial
- HouseholdSpend
- FoodSpend
- WealthSapes
- WealthScapes Lite
- WealthTrends NEW
- WealthTransfer NEW
- AgeByIncome
- LiquidAssets
- MoneyMatters
- Neighbourhood View™

Behavioural
- Opticks Vividata
- Opticks Numeris
- Community Life
- Giving Back
- Homescan® Profiles
- Opticks Automotive
- CannabisInsights
- GreenLiving
- Opticks Social
- Opticks Mobile
- Opticks eShopper (online)

Location
- Businesses
- Financial Institutions
- Spectra Trade Areas
- Shopping Centres
- Retail Locations
- TrafficCounts
- Points of Interest

Contact
- ResponseCanada Consumer
- ResponseCanada Movers
- ResponseCanada Pre-Movers

Business
- BusinessProfiles
- ResponseCanada Business

Health
- CommunityHealth
- Frailty Index NEW
- Social Index NEW

Geographic
- Enhanced PCCF
- Streets & Boundaries
- Postal Code Boundaries

Privacy Compliant Data Products

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PRIZM

Canada’s leading segmentation system for understanding fans, donors and markets
PRIZM: A Lifestage Segmentation Perspective
PRIZM Overview

The PRIZM segmentation system classifies Canada’s neighbourhoods at a postal code-level into actionable, lifestyle segments.

PRIZM Captures:

- Aging population
- Increased cultural diversity
- More urban lifestyles; Emerging urban Fringe
- Emergence of Millennial lifestyles
- Evolving household types
- Uniqueness of each 6-digit postal code

- Best in class methodologies and multiple recent data sources combine for a granular view that confirms the big picture from the ground up
- Assigns neighborhoods to a lifestyle segment at a postal code level based on demographics, psychographics, and other behaviours

Source: PRIZM 2020

https://prizm.environicsanalytics.com/

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Understanding PRIZM Segment Descriptions

The PRIZM segment of a customer or prospect can provide a wealth of information about them.

**SES I** (the lower the SESI number, the greater the affluence)
- Income & Education
- Low-Income Indicator
- Dwelling Value
- Net Worth
- Discretionary Income
- Household Size

**Social Group** (the lower the social group number, the greater the affluence)

<table>
<thead>
<tr>
<th>Social Group</th>
<th>Code</th>
<th>Description</th>
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<tbody>
<tr>
<td>Urban</td>
<td>U1–U6</td>
<td>Urban, Y1–Y3</td>
</tr>
<tr>
<td>Urban Fringe</td>
<td>F1–F3</td>
<td>Urban Fringe, F1–F3</td>
</tr>
<tr>
<td>Suburban</td>
<td>S1–S7</td>
<td>Suburban, S1–S7</td>
</tr>
<tr>
<td>Town</td>
<td>T1</td>
<td>Suburban, T1</td>
</tr>
<tr>
<td>Rural</td>
<td>R1–R3</td>
<td>Rural, R1–R3</td>
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**Lifestage Group** (the higher the Lifestage Group Number, the further the segment is along in their life stage)

<table>
<thead>
<tr>
<th>Lifestage Group</th>
<th>Code</th>
<th>Description</th>
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<tbody>
<tr>
<td>Youth</td>
<td>Y1–Y3</td>
<td>Younger, well-educated urban singles</td>
</tr>
<tr>
<td>Families</td>
<td>F1–F3</td>
<td>Families</td>
</tr>
<tr>
<td>Mature</td>
<td>M1–M2</td>
<td>Mature</td>
</tr>
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</table>

**Segment Name**

- **U1–U6** Younger, well-educated urban singles
- **F1–F3** Urban Fringe
- **S1–S7** Suburban
- **T1** Urban
- **R1–R3** Rural

**Segment Icon**

- ** SESI** (the lower the SESI number, the greater the affluence)
- **Lifestage Group** (the higher the Lifestage Group Number, the further the segment is along in their life stage)

Source: PRIZM 2020

©2020 Environics Analytics
Urbanity

Urban

Urban Fringe

Suburban

Town & Rural

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Translating data insights into action

Taking a deeper dive into data driven partnerships
To build a strategy, it would help to know...

Corporate Sponsorship

Brand significance

Local vs National Market

Other opportunities to reach your target and cross shop potential

Disposable income and potential basket size

Social Media Engagement

Event Participants

Drivers and motivations

Our goal is to give our clients a 360 view of your constituents
How to get started
Understand your Audience through segmentation

- Audience segments, both developed and potential, are created from clustering of PRIZM segments based on similarities in program behaviours, demographics and psychographics.

- Additional data is overlaid onto constituent segments and interpreted.

- Actionable Target Groups

- Detailed view into core groups
- Actionable insights and observations generated in this phase.
Baby Boomers

Demographics

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avg. Household Income</td>
<td>$254K</td>
<td>248</td>
</tr>
<tr>
<td>Visible Minority Pop.</td>
<td>22%</td>
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<tr>
<td>Total Immigrants</td>
<td>26%</td>
<td>113</td>
</tr>
<tr>
<td>English Only</td>
<td>77%</td>
<td>112</td>
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<tr>
<td>Household Size</td>
<td>11%</td>
<td>127</td>
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<td>Household Size</td>
<td>11%</td>
<td>127</td>
</tr>
<tr>
<td>Highest Education Level</td>
<td>Management</td>
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<tr>
<td>Total Immigrants</td>
<td>26%</td>
<td>113</td>
</tr>
<tr>
<td>English Only</td>
<td>77%</td>
<td>112</td>
</tr>
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<td>Have Internet Access</td>
<td>91%</td>
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<td>Have Internet Access</td>
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<tr>
<td>Households with children</td>
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<tr>
<td>Occupational Category</td>
<td>Management</td>
<td>159</td>
</tr>
<tr>
<td>Social Values</td>
<td>Brand Apathy</td>
<td>96</td>
</tr>
<tr>
<td>Confidence in big business</td>
<td>88%</td>
<td>91</td>
</tr>
<tr>
<td>Skepticism towards advertising</td>
<td>89%</td>
<td>91</td>
</tr>
<tr>
<td>Personal Optimism</td>
<td>89%</td>
<td>112</td>
</tr>
<tr>
<td>Social Responsibility</td>
<td>99%</td>
<td>109</td>
</tr>
<tr>
<td>Pursuit of Intensity</td>
<td>85%</td>
<td>85</td>
</tr>
</tbody>
</table>

Brands & Consumption

<table>
<thead>
<tr>
<th>Top Dealerships</th>
<th>%</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Toyota/Lexus</td>
<td>10.2</td>
<td>110</td>
</tr>
<tr>
<td>Honda</td>
<td>8.4</td>
<td>100</td>
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<tr>
<td>Buick/Cadillac/Chevrolet/GMC</td>
<td>8.4</td>
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<table>
<thead>
<tr>
<th>Top Banks</th>
<th>%</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>TD Canada Trust</td>
<td>19.6</td>
<td>134</td>
</tr>
<tr>
<td>RBC Royal Bank</td>
<td>16.8</td>
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<tr>
<td>CIBC</td>
<td>11.1</td>
<td>115</td>
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<table>
<thead>
<tr>
<th>Restaurants</th>
<th>%</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tim Hortons'</td>
<td>64.1</td>
<td>99</td>
</tr>
<tr>
<td>McDonald's</td>
<td>50.6</td>
<td>93</td>
</tr>
<tr>
<td>Swiss Chalet</td>
<td>32.6</td>
<td>124</td>
</tr>
</tbody>
</table>

| Best Buy                         | 48.8 | 115   |
| Staples                          | 39.8 | 108   |

| Average Per Household Clothing Expenditure | $8,487 | 246 |
| Average Per Household Recreation Expenditure | $12,230 | 257 |
| Average Per Household Transportation Expenditure | $29,276 | 204 |

Social Values

<table>
<thead>
<tr>
<th>Social Values</th>
<th>Importance of Brand</th>
<th>%</th>
<th>Joy of Consumption</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand Apathy</td>
<td>96</td>
<td>94</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Importance of Brand</td>
<td>94</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Confidence in big business</td>
<td>88</td>
<td>91</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Skepticism towards advertising</td>
<td>89</td>
<td>112</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal Optimism</td>
<td>109</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social Responsibility</td>
<td>99</td>
<td>109</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pursuit of Intensity</td>
<td>85</td>
<td>85</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Obedience to Authority</td>
<td>109</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pursuit of Novelty</td>
<td>85</td>
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Media

<table>
<thead>
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<td>Direct/Outdoor</td>
<td>11 Minutes/Day</td>
<td>96</td>
</tr>
<tr>
<td>Top Activities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sports Content</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Restaurant Guides</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Real Estate Listings</td>
<td></td>
<td></td>
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<tr>
<td>Magazines</td>
<td>11 Minutes/Day</td>
<td>93</td>
</tr>
<tr>
<td>Genres</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business &amp; Finance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>News</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gardening</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Newspapers</td>
<td>1.5 Hours/Week</td>
<td>130</td>
</tr>
<tr>
<td>Top Sections Read</td>
<td></td>
<td></td>
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<tr>
<td>New Homes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Radio</td>
<td>14 Hours/Week</td>
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</tr>
<tr>
<td>Top Formats</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Classical/Fine Arts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>All News</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Modern/Alternative Rock</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Facebook</td>
<td>73%</td>
<td>92</td>
</tr>
<tr>
<td>Twitter</td>
<td>30%</td>
<td>112</td>
</tr>
<tr>
<td>Instagram</td>
<td>35%</td>
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</tr>
<tr>
<td>Snapchat</td>
<td>11%</td>
<td>82</td>
</tr>
<tr>
<td>Facebook</td>
<td>17%</td>
<td>131</td>
</tr>
<tr>
<td>YouTube</td>
<td>73%</td>
<td>103</td>
</tr>
<tr>
<td>Snapchat</td>
<td>11%</td>
<td>82</td>
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<tr>
<td>Whatsapp</td>
<td>37%</td>
<td>122</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>54%</td>
<td>129</td>
</tr>
<tr>
<td>Blogles</td>
<td>17%</td>
<td>131</td>
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</table>

Management

| Management                      | 159 |
| University Degree               | 191 |

©2020 Environics Analytics
## Demographics

<table>
<thead>
<tr>
<th>Category</th>
<th>Value</th>
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<tbody>
<tr>
<td>Avg. Household Income</td>
<td>$93K</td>
</tr>
<tr>
<td>Visible Minority Pop.</td>
<td>17%</td>
</tr>
<tr>
<td>Total Immigrants</td>
<td>23%</td>
</tr>
<tr>
<td>English Only</td>
<td>83%</td>
</tr>
<tr>
<td>Have Internet Access</td>
<td>87%</td>
</tr>
<tr>
<td>Households with Children</td>
<td>23%</td>
</tr>
<tr>
<td>Household Size</td>
<td>4%</td>
</tr>
<tr>
<td>Highest Education Level</td>
<td>Management 85%</td>
</tr>
<tr>
<td>Occupation Category</td>
<td>Total Immigrants 110%</td>
</tr>
</tbody>
</table>

## Social Values

<table>
<thead>
<tr>
<th>Category</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand Apathy</td>
<td>88</td>
</tr>
<tr>
<td>Confidence in Big Business</td>
<td>96</td>
</tr>
<tr>
<td>Skepticism Towards Ads</td>
<td>111</td>
</tr>
<tr>
<td>Personal Optimism</td>
<td>97</td>
</tr>
<tr>
<td>Social Responsibility</td>
<td>105</td>
</tr>
<tr>
<td>Pursuit of Intensity</td>
<td>81</td>
</tr>
<tr>
<td>Importance of Brand</td>
<td>107</td>
</tr>
<tr>
<td>Joy of Consumption</td>
<td>79</td>
</tr>
<tr>
<td>Confidence in Advertising</td>
<td>88</td>
</tr>
<tr>
<td>Efforts Towards Health</td>
<td>123</td>
</tr>
<tr>
<td>Obedience to Authority</td>
<td>83</td>
</tr>
<tr>
<td>Pursuit of Novelty</td>
<td>79</td>
</tr>
</tbody>
</table>

## Brands & Consumption

<table>
<thead>
<tr>
<th>Top Dealerships</th>
<th>%</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Toyota/Lexus</td>
<td>8.9</td>
<td>96</td>
</tr>
<tr>
<td>Honda</td>
<td>8.3</td>
<td>98</td>
</tr>
<tr>
<td>Buick/Cadillac/Chevrolet/GMC</td>
<td>7.8</td>
<td>91</td>
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<table>
<thead>
<tr>
<th>Top Banks</th>
<th>%</th>
<th>Index</th>
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<tbody>
<tr>
<td>RBC Royal Bank</td>
<td>18.2</td>
<td>110</td>
</tr>
<tr>
<td>TD Canada Trust</td>
<td>17.1</td>
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<td>CIBC</td>
<td>11.1</td>
<td>114</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Restaurants</th>
<th>%</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tim Horton's</td>
<td>64.9</td>
<td>100</td>
</tr>
<tr>
<td>McDonald's</td>
<td>49.6</td>
<td>92</td>
</tr>
<tr>
<td>A&amp;W</td>
<td>33.9</td>
<td>107</td>
</tr>
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</table>

## Social Values

<table>
<thead>
<tr>
<th>Category</th>
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</tr>
</thead>
<tbody>
<tr>
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<td>Pursuit of Novelty</td>
<td>79</td>
</tr>
</tbody>
</table>

## Media

<table>
<thead>
<tr>
<th>Source</th>
<th>Minutes/Day</th>
<th>%</th>
</tr>
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<tbody>
<tr>
<td>Internet</td>
<td>202</td>
<td>95</td>
</tr>
<tr>
<td>Magazine</td>
<td>12</td>
<td>144</td>
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<tr>
<td>Newspaper</td>
<td>1.8</td>
<td>102</td>
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<tr>
<td>TV</td>
<td>207</td>
<td>111</td>
</tr>
<tr>
<td>Radio</td>
<td>15</td>
<td>102</td>
</tr>
</tbody>
</table>

## Top Sections Read

- Classifieds
- New Homes
- Editorials

## Top Formats

- Today's Country
- Adult Contemporary

## Top Programs

- Figure Skating
- Golf
- Curling

## Top Activities

- Use Discount Coupons
- Real Estate Listings
- Restaurant Guides/Reviews

## Top DM Formats

- Newspaper Flyers
- Yellow Pages

## Technology

<table>
<thead>
<tr>
<th>Source</th>
<th>%</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>78</td>
<td>98</td>
</tr>
<tr>
<td>Twitter</td>
<td>26</td>
<td>95</td>
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<td>Snapchat</td>
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<td>79</td>
</tr>
<tr>
<td>Instagram</td>
<td>32</td>
<td>96</td>
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<tr>
<td>WhatsApp</td>
<td>27</td>
<td>88</td>
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<tr>
<td>LinkedIn</td>
<td>40</td>
<td>96</td>
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<td>83</td>
</tr>
<tr>
<td>Pursuit of Novelty</td>
<td>79</td>
</tr>
</tbody>
</table>
### Demographics

- **Average Household Income:** $99K
- **Visible Minority Population:** 35%
  - Top Vis Min: 9% Chinese, 6% South Asian, 5% Black
- **Total Immigrants:** 29%
- **Have Internet Access:** 90%
- **Households with Children:** 18%
  - Children living at home
- **Occupation Category:** Management
- **Highest Education Level:** University Degree

### Social Values

- **Brand Apathy:** 99
- **Importance of Brand:** 110
- **Confidence in Big Business:** 85
- **Skepticism in Advertising:** 117
- **Personal Optimism:** 114
- **Confidence in Advertising:** 97
- **Social Responsibility:** 96
- **Pursuit of Intensity:** 113

### Brands & Consumption

#### Top Dealerships

- **Toyota/Lexus:** 9.0 %
- **Honda:** 7.1 %
- **Hyundai:** 6.3 %

#### Top Banks

- **TD Canada Trust:** 18.7 %
- **RBC Royal Bank:** 16.2 %
- **CIBC:** 11.7 %

#### Restaurants

- **Tim Hortons:** 59.4 %
- **McDonald’s:** 49.3 %
- **Starbucks:** 35.7 %

### Media

#### Internet

- **Minutes/Day:** 244
  - Top Activities:
    - Listen to a Podcast
    - Restaurant Guides/Reviews
    - Read Online Newspapers
- **Direct/Outdoor**
  - Minutes/Day: 11
  - Top DM Formats:
    - Info from Websites
    - Direct Email Offers
  - Top Programs:
    - Basketball
    - Sci-Fi/Fantasy
    - Cartoons

#### Magazine

- **Minutes/Day:** 9
- **Top Formats:**
  - Modern/Alt Rock
  - Multi/Variety
  - News/Talk
  - Technology
  - Business
  - Editorials

#### Newspaper

- **Hours/Week:** 1.5
- **Top Sections Read:**
  - Technology
  - Business
  - Editorials

#### Radio

- **Hours/Week:** 12
- **Top Formats:**
  - Modern/Alt Rock
  - Multi/Variety
  - News/Talk

#### Social Media

- **Facebook:** 80 %
- **Twitter:** 36 %
- **Instagram:** 44 %
- **LinkedIn:** 55 %
- **YouTube:** 76 %
- **Snapchat:** 16 %
- **WhatsApp:** 47 %
- **Blogs:** 18 %

### Other Data Points

- **Environics Analytics:** ©2020
Takeaways
• Due to ongoing economic impact of this pandemic across all business industry sectors, organizations are continually searching to find new and innovative ways to engage and retain customers and help their brands stand out from the ever-growing noise in the market and communities they serve.

• Drive your business and partnerships forward using data, numbers and facts. Now is not the time for “gut feel”.

• Now, more than ever before, there is an abundance of data being collected by and shared on and about the general population. Ensure you have the right systems and partners in place to best utilize this data and integrate it into your decision-making process.

• Customers values don’t change, the manner with which you engage them do!

• When engaging with your partners, ensure that you drive the relationship by providing valuable data on who your audience is, what the market potential is for their brand and offering and use data driven strategies to optimize your engagement and create the greatest ROI for everyone.
QUESTIONS