Community Profile: Ottawa – Vanier BIA

Prepared for: Economic Developers Council of Ontario – My Main Street

ENVIRONICS ANALYTICS

Confidential

Date: March 7, 2022

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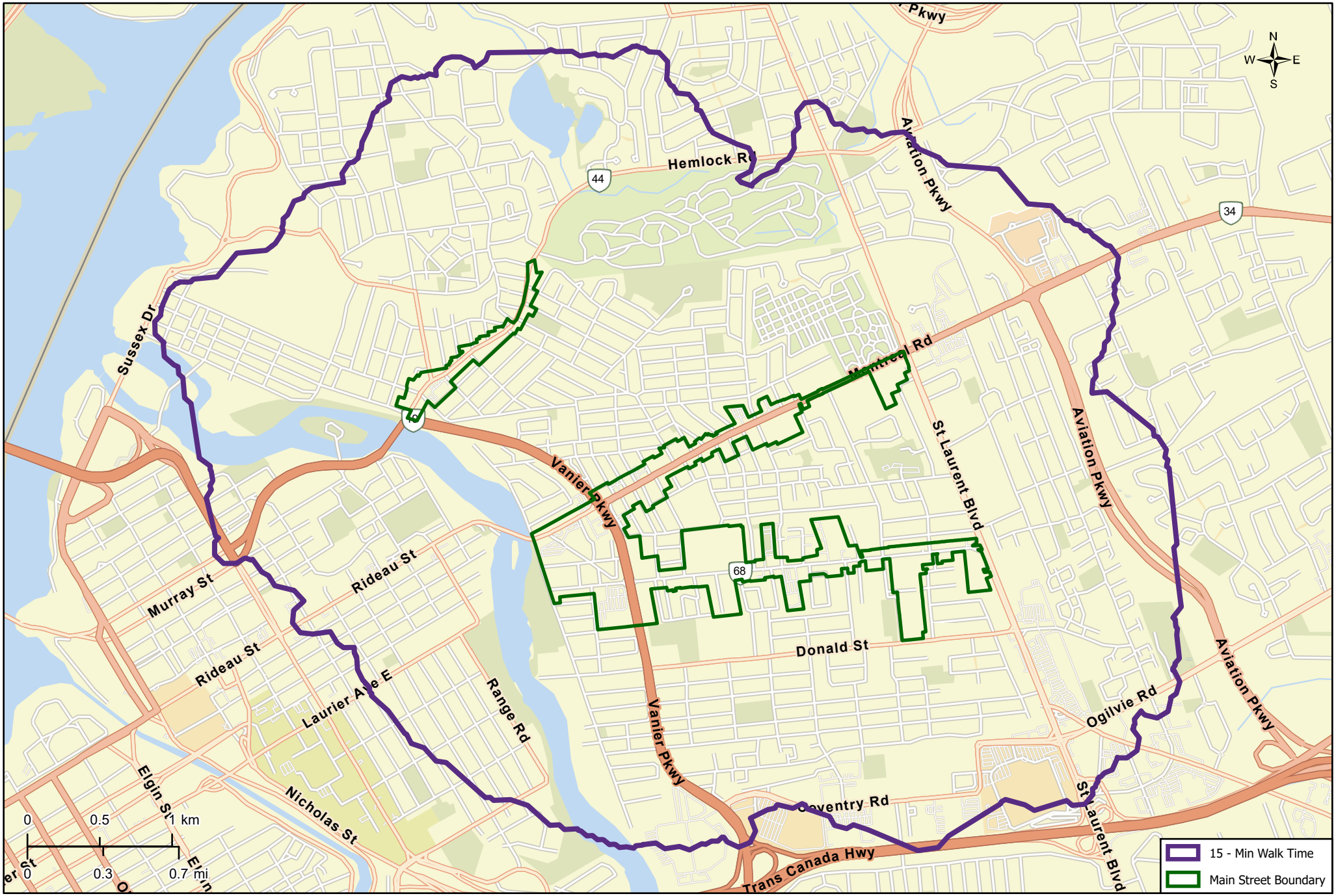
Ottawa - Vanier BIA
Main Street Boundary and Trade Area

ENVIRONICS ANALYTICS



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Demographics, PRIZM Profile, and Psychographics

Demographics | Population & Households

Trade Area: Ottawa - Vanier BIA

POPULATION

64,151

HOUSEHOLDS

31,092

MEDIAN MAINTAINER AGE

51

Index:94

MARITAL STATUS

41.5%

Index: 72

Married/Common-Law

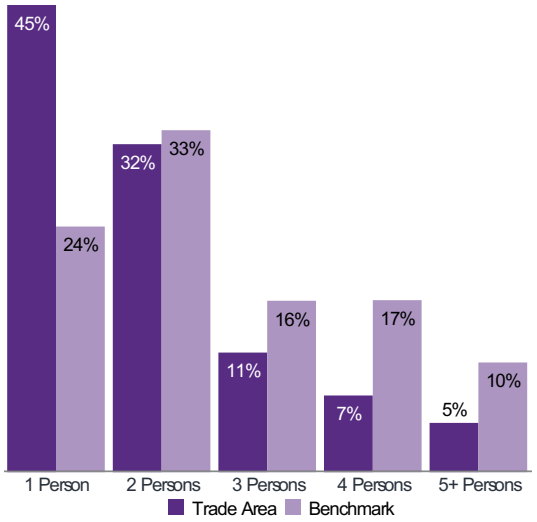
FAMILY STATUS*

23.8%

Index:150

Total Lone-Parent Families

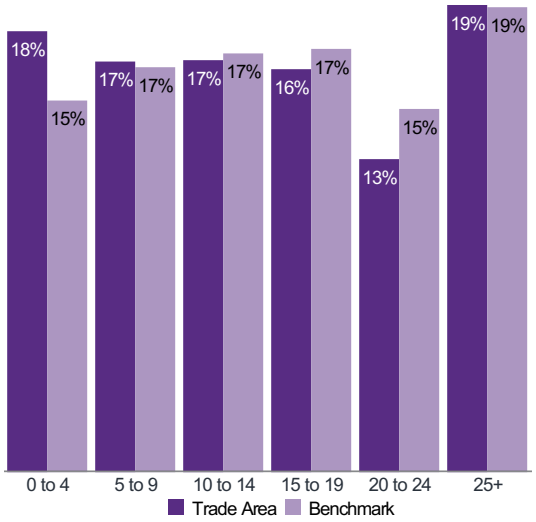
HOUSEHOLD SIZE



POPULATION BY AGE

	Count	%	Index
0 to 4	2,765	4.3	85
5 to 9	2,550	4.0	74
10 to 14	2,546	4.0	70
15 to 19	2,806	4.4	74
20 to 24	4,781	7.5	112
25 to 29	6,090	9.5	135
30 to 34	5,378	8.4	126
35 to 39	4,623	7.2	111
40 to 44	3,787	5.9	95
45 to 49	3,613	5.6	90
50 to 54	3,655	5.7	87
55 to 59	4,455	6.9	96
60 to 64	4,269	6.7	99
65 to 69	3,655	5.7	101
70 to 74	3,326	5.2	108
75 to 79	2,295	3.6	108
80 to 84	1,637	2.6	117
85+	1,919	3.0	135

AGE OF CHILDREN AT HOME



Benchmark: Southern Ontario

**Chosen from index ranking with minimum 5% composition*

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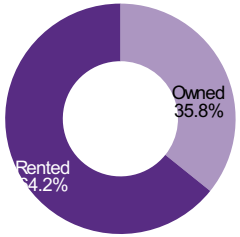
Index Colours:	<80	80 - 110	110+

Demographics | Housing & Income

Trade Area: Ottawa - Vanier BIA

Population: 64,151 | **Households:** 31,092

TENURE



STRUCTURE TYPE

Houses

33.9%

Index:44

Apartments

65.8%

Index:298

AGE OF HOUSING*

60+ Years Old

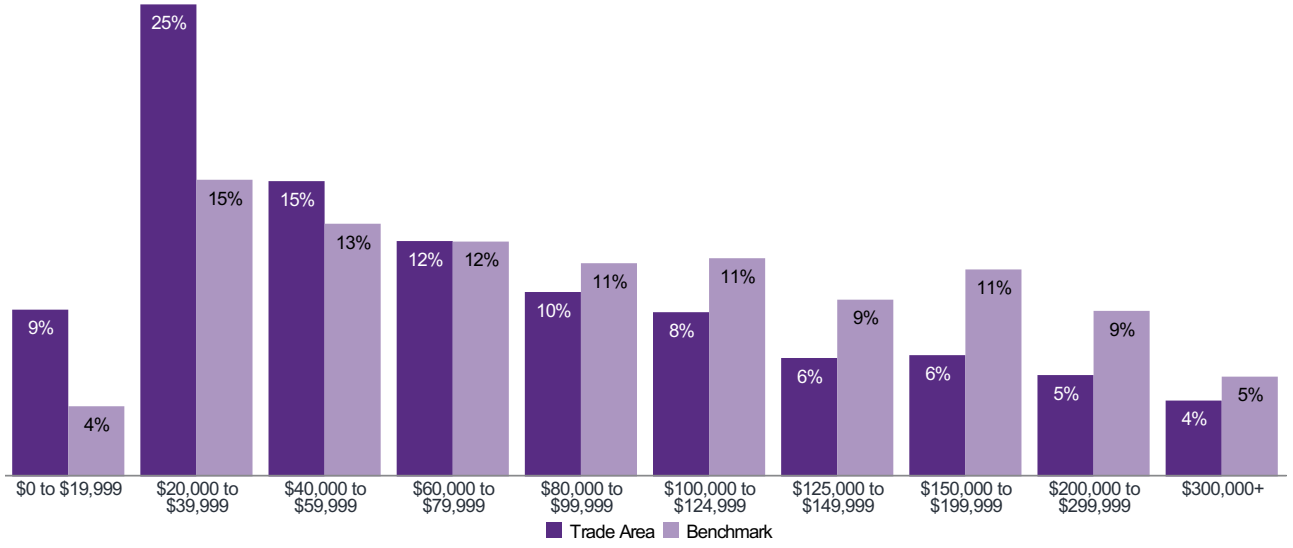
% Comp:36.2 Index: 175

AVERAGE HOUSEHOLD INCOME

$91,607

Index:80

HOUSEHOLD INCOME DISTRIBUTION



Benchmark: Southern Ontario

**Chosen from index ranking with minimum 5% composition*

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Index Colours:	<80	80 - 110	110+

Demographics | Education & Employment

Trade Area: Ottawa - Vanier BIA

Population: 64,151 | **Households:** 31,092

EDUCATION

37.8%

Index:142

University Degree

LABOUR FORCE PARTICIPATION

60.5%

Index:93

Participation Rate

METHOD OF TRAVEL TO WORK: TOP 2*

17.9%

Index:49

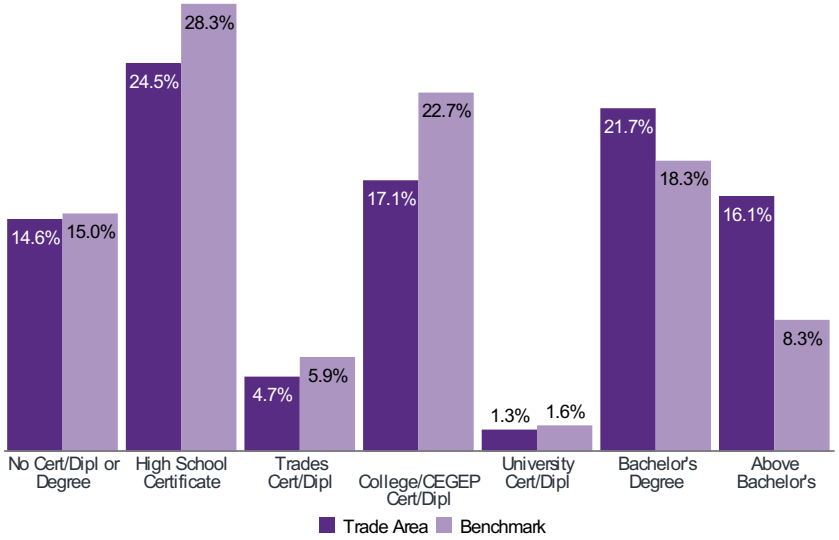
Travel to work by **Car (as Driver)**

11.8%

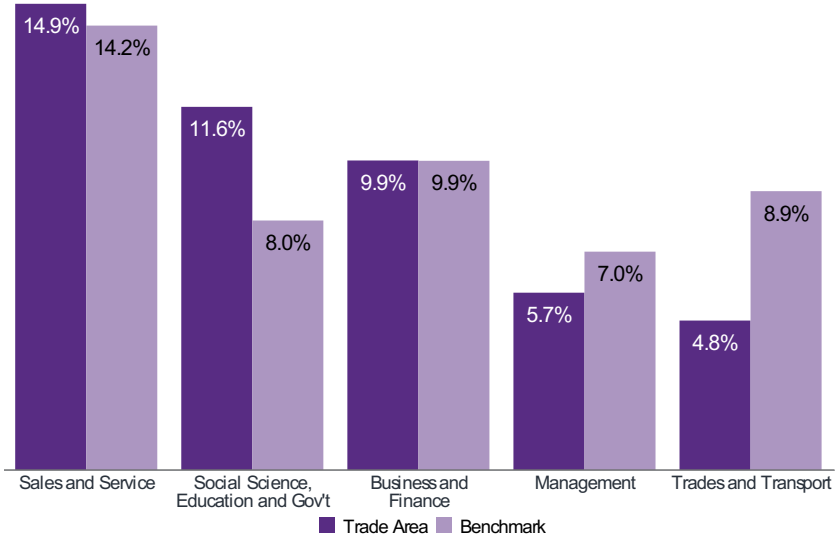
Index:270

Travel to work by **Public Transit**

EDUCATIONAL ATTAINMENT



OCCUPATIONS: TOP 5*



Benchmark: Southern Ontario

**Ranked by percent composition*

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Index Colours:	<80	80 - 110	110+

Demographics | Diversity

Trade Area: Ottawa - Vanier BIA

Population: 64,151 | **Households:** 31,092

ABORIGINAL IDENTITY

4.6%

Index:195

VISIBLE MINORITY PRESENCE

30.2%

Index:104

Belong to a visible minority group

NON-OFFICIAL LANGUAGE

2.2%

Index:108

No knowledge of English or French

IMMIGRATION

24.7%

Index:94

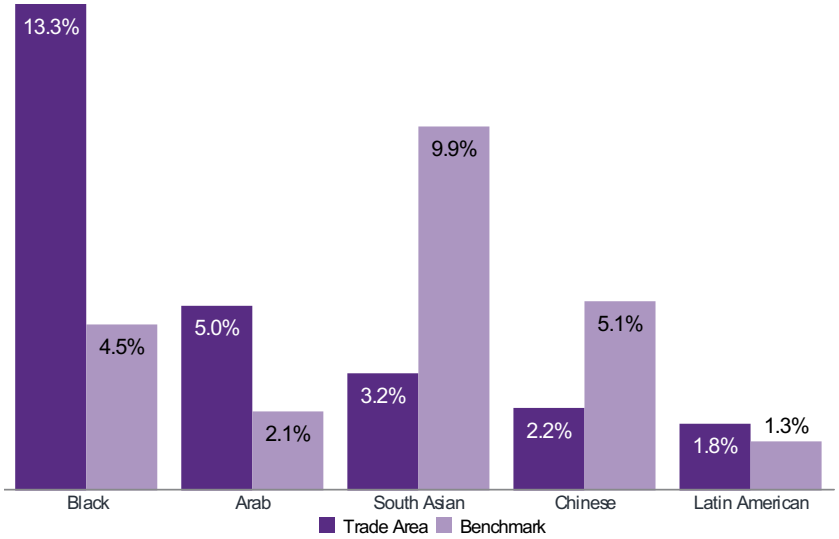
Born outside Canada

PERIOD OF IMMIGRATION*

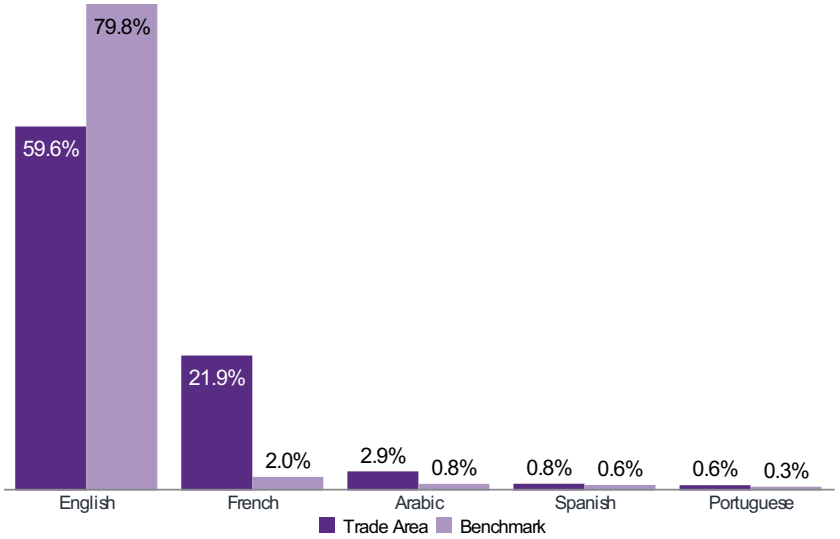
Before 2001

10.8% Index:77

VISIBLE MINORITY STATUS: TOP 5**



LANGUAGES SPOKEN AT HOME: TOP 5**



Benchmark: Southern Ontario

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**Chosen from index ranking with minimum 5% composition*

***Ranked by percent composition*

Index Colours:	<80	80 - 110	110+

PRIZM Profile | Top Segments

Trade Area: Ottawa - Vanier BIA

Households: 31,094

Top 5 segments represent 57.2% of households in Ottawa - Vanier BIA

Rank:	1
Hhlds:	5,780
Hhld %:	18.59
% in Benchmark:	2.06
Index:	905

One of the largest segments, Friends & Roomies attracts mostly young singles and single-parent families to neighbourhoods in cities like Calgary, Edmonton, Winnipeg and Victoria. More than a third of maintainers are younger than 35, more than half under 44. A majority of the households contain single, divorced or separated individuals. With mixed educational achievement—from high school to university degrees—members hold a variety of predominantly service sector and white-collar jobs. Incomes are below average, and over three-quarters are renters, mostly in low-rise units. In this transitional segment, more than 60 percent of Friends & Roomies households moved in the past five years. Today, nearly 40 percent of the population are first-generation Canadians, typically black, Filipino and South Asian immigrants who identify as visible minorities. These young people are able to turn modest incomes into active social lives, enjoying bars, nightclubs and community theatres at high rates. And many like to shop—especially online—for video games, movies and music. In their diverse neighbourhoods, they enjoy Culture Sampling, incorporating the cultural influences of other groups into their lives.

Rank:	2
Hhlds:	4,554
Hhld %:	14.65
% in Benchmark:	3.77
Index:	388

Located in cities across Canada, On Their Own Again consists of older singles living in high-rise apartments. Nearly 60 percent live alone—highest among all segments. And almost 30 percent of residents are over 65, with one in ten a widowed individual. Fewer than half are still in the labour force, but with over 45 percent of adults having attended college or a university, those still working hold white-collar and service sector jobs in sales, administrative support and real estate. Although incomes are downscale, pensions boost household net worth and provide an economic cushion. In On Their Own Again, nearly 80 percent of households rent apartments, and an overwhelming number of them live in older buildings. Many are newcomers, with half having moved in the past five years and a disproportionate number coming from China, the Philippines and the U.K. Nearly 40 percent of residents are first-generation Canadians; almost 20 percent are second-generation. With their unpretentious lifestyle, residents like to escape the routine by going to a casino, community theatre or movie drama. Many respond to marketing messages that appeal to their support for the value Ethical Consumerism.

Rank:	3
Hhlds:	2,959
Hhld %:	9.52
% in Benchmark:	0.42
Index:	2,275

Downtown Verve is a cultural and intellectual hub. Concentrated in a handful of Canada's largest cities, the segment attracts a mix of younger and middle-aged singles, couples and families who prefer the excitement and convenience of downtown living. One of the most educated groups, many residents are first- and second-generation Canadians employed in well-paying management and white-collar positions. They're happy to own or rent in these older urban neighbourhoods, where they're within a few blocks of banks, theatres and dry cleaners. Although their duplexes, row houses, semi-detached houses and low-rise apartments are aging, the average dwelling value is nearly $900,000—double the national average. With their upscale incomes, their spending power appears even greater because of the significant proportion of singles and childless couples. Living close to entertainment districts, this group has high rates for going to bars, restaurants and cinemas. They also maintain a healthy lifestyle, eating organic food, taking fitness classes and playing racquet sports. With their strong Ecological Concern, they believe that the efforts of one person are never too insignificant when it comes to protecting the environment.

Rank:	4
Hhlds:	2,269
Hhld %:	7.30
% in Benchmark:	3.49
Index:	209

The most economically challenged of all segments, Just Getting By is home to younger, low-income singles and single-parent families located in large cities like London, St. Catharines, Windsor and Halifax. In their dense neighbourhoods, nearly 45 percent of maintainers are under 45 years old. More than half are single, divorced or separated, and over a third are lone-parent families, typically with younger children. Residents tend to be third-plus-generation Canadians with low education levels and low-level jobs in sales, the services, trades and manufacturing. Most households can only afford to rent units in older low-rise apartment buildings or own inexpensive single-detached houses. But being young and mobile has its advantages: more than half moved in the past five years with the hope of climbing the socioeconomic ladder. Surveys show a desire to improve their prospects in the popularity of online courses and management training programs. Without deep pockets, they engage in low-cost activities like going to parks, city gardens and auto shows. In this segment, budget-conscious residents score high for the value Importance of Price.

Rank:	5
Hhlds:	2,229
Hhld %:	7.17
% in Benchmark:	1.34
Index:	533

The increase in immigration over the last two decades has transformed many communities. Midtown Movers reflects the arrival of newcomers in established neighbourhoods of large cities beyond Toronto and Vancouver. Some are foreign-born students who've settled in university towns; others arrived as a result of job programs. One-third of Midtown Movers are immigrants, with 45 percent of the population identifying as visible minorities, such as blacks, South Asians, Filipinos, Arabs and Latin Americans. And one-fifth of residents speak a non-official language. Households contain a mix of younger singles and middle-aged families; one in three are lone-parent families. With their modest educations—over half haven't gone beyond high school—most work at jobs in manufacturing, services and the trades. Their lower-middle incomes provide them with housing in older, single-detached houses, low-rise apartments and row houses; nearly 55 percent are renters and half of residents have moved in the last five years. Today many enjoy active social lives: the singles joining friends at nightclubs and dinner theatres, the families heading for zoos and aquariums. But their high score for Penchant for Risk suggests an openness to more extreme activities to get the most out of life.

Benchmark: Southern Ontario

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Psychographics | SocialValues Overview

Trade Area: Ottawa - Vanier BIA

Strong Values

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Flexible Families	114

Weak Values

Values	Index
Attraction to Nature	78
Legacy	86
Obedience to Authority	86
Utilitarian Consumerism	87
Religiosity	88
Social Darwinism	89
Consumption Evangelism	91
Importance of Brand	91
Technology Anxiety	91
Xenophobia	91

Descriptions | Top 3 Strong Values

Ecological Concern

A tendency to believe that today's environmental problems are a result of industrial and personal disregard for the environment. People strong on this construct feel that environmental destruction is unacceptable and reject the notion that job protection or economic advancement should be allowed at the expense of environmental protection. They also reject the idea that any one person is too small to make a contribution to this project

Social Learning

Attraction to, and interest in, diversity. Feeling that there is a great deal to learn through contact and conversation with people different from oneself, who come from other backgrounds and places. Diversity is perceived as a source of personal enrichment, a way to satisfy a hunger for discovery and exploration and to extend a network of contacts. This construct is also associated with a respect for other people and cultures, as well as a heightened social conscience.

Culture Sampling

This construct identifies the view that other cultures have a great deal to teach us, and measures people's inclination to incorporate some of these cultural influences into their own lives.

Descriptions | Top 3 Weak Values

Attraction to Nature

How close people want to be to nature, whether to recharge their spiritual batteries or to enjoy a simpler, healthier or more authentic way of life.

Legacy

Desire to leave behind a legacy after death, either to one's descendants or to society at large. This legacy could be of a financial, cultural, moral or spiritual nature. People strong on this construct tend to plan their bequests well in advance.

Obedience to Authority

A belief in playing by the rules. The belief that persons or organizations in positions of authority should be deferred to at all times. A belief that there are rules in society and everyone should follow them. The feeling that young people in particular should be taught to obey authority rather than question it.

Benchmark: Ontario

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Financial and Expenditure Overview

Financial | WealthScapes Overview

Trade Area: Ottawa - Vanier BIA

WealthScapes Households: 31,031

INCOME*

Household Income	Household Disposable Income	Household Discretionary Income	Annual RRSP Contributions
$ 91,938	$ 71,426	$ 49,292	$ 2,114
Index:79	Index: 78	Index: 77	Index: 59

WEALTH*

Net Worth

% Holders

99.3% Index:100

Balance

$581,538

Index:79

ASSETS*

Savings

% Holders

94.2% Index:99

Balance

$77,048

Index:101

Investments

% Holders

52.5% Index:88

Balance

$378,386

Index:112

Unlisted Shares

% Holders

11.3% Index:91

Balance

$422,801

Index:133

Real Estate

% Holders

39.6% Index:52

Balance

$742,098

Index:99

Liquid Assets

% Holders

97.1% Index:99

Balance

$330,984

Index:100

DEBT*

Consumer Debt

% Holders

88.0% Index:97

Balance

$34,438

Index:52

Mortgage Debt

% Holders

21.3% Index:46

Balance

$258,891

Index:87

FINANCIAL RATIO

Debt:Asset

% Holders

0.13% Index:61

Benchmark: Southern Ontario

% Holders represent where customers are found.

**Average values per holding household as at December 31, 2020.*

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Index Colours:	<80	80 - 110	110+

Financial | WealthScapes - Ratios

Trade Area: Ottawa - Vanier BIA

WealthScapes Households: 31,031

FINANCIAL RATIOS*

Debt: Asset	Debt: Liquid Assets	Consumer Debt - Discr. Income	Savings - Investments
0.13	0.27	0.61	0.62
Index:61	Index: 43	Index:66	Index:103

Pension - Non-Pension Assets	Real Estate Assets - Liq. Assets	Mortgage - Real Estate Assets	Mortgage - Consumer Debt
0.35	0.91	0.19	1.82
Index:161	Index:52	Index:77	Index:79

Benchmark: Southern Ontario

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Index Colours:	<80	80 - 110	110+

Expenditures | HouseholdSpend - Annual Expenditure Overview

Trade Area: Ottawa - Vanier BIA

Households: 31,092

Total Aggregate Current Consumption: $2,012,497,474

Average Current Consumption	Average Household Income	Average Disposable Income
$64,727	$91,301	$70,152
Index 79	Index 79	Index 78

Shelter

Avg. Dollars/Household	Pct. of Total Expenditure
$17,749	27.4%
Index 84	Index 107

Food

Avg. Dollars/Household	Pct. of Total Expenditure
$10,225	15.8%
Index 80	Index 101

Transportation

Avg. Dollars/Household	Pct. of Total Expenditure
$9,130	14.1%
Index 66	Index 84

Health Care

Avg. Dollars/Household	Pct. of Total Expenditure
$4,791	7.4%
Index 88	Index 111

Household Operation

Avg. Dollars/Household	Pct. of Total Expenditure
$4,390	6.8%
Index 77	Index 97

Tobacco and Alcohol

Avg. Dollars/Household	Pct. of Total Expenditure
$3,752	5.8%
Index 105	Index 133

Recreation

Avg. Dollars/Household	Pct. of Total Expenditure
$3,330	5.1%
Index 70	Index 88

Household Furnishings

Avg. Dollars/Household	Pct. of Total Expenditure
$2,957	4.6%
Index 74	Index 94

Clothing

Avg. Dollars/Household	Pct. of Total Expenditure
$2,490	3.8%
Index 75	Index 95

Benchmark: Southern Ontario

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Displaying the top nine HouseholdSpend categories ranked by percent of total expenditure.
Benchmark used for Index calculations.

Index Colours:	<80	80 - 110	110+

Expenditures | Foodspend - Annual Household Expenditure Overview

Trade Area: Ottawa - Vanier BIA

Households: 31,092

Average Household Income	Average Food Expenditure	Average Spend on Food from Restaurants	Average Spend on Food from Stores
$91,301	$10,225	$3,592	$6,633
Index 79	Index 80	Index 89	Index 76

Total Aggregate Food Expenditure: $ 317,929,640

Bakery

Avg. Dollars/Household	Pct. of Total Expenditure
$634	9.6%
Index 73	Index 96

Cereal Products

Avg. Dollars/Household	Pct. of Total Expenditure
$368	5.5%
Index 72	Index 95

Fruit and nuts

Avg. Dollars/Household	Pct. of Total Expenditure
$892	13.4%
Index 81	Index 107

Vegetables

Avg. Dollars/Household	Pct. of Total Expenditure
$701	10.6%
Index 76	Index 100

Dairy products & Eggs

Avg. Dollars/Household	Pct. of Total Expenditure
$983	14.8%
Index 77	Index 101

Meat

Avg. Dollars/Household	Pct. of Total Expenditure
$1,090	16.4%
Index 69	Index 92

Fish & Seafood

Avg. Dollars/Household	Pct. of Total Expenditure
$251	3.8%
Index 85	Index 113

Beverages & Other Food

Avg. Dollars/Household	Pct. of Total Expenditure
$1,715	25.9%
Index 78	Index 103

Benchmark: Southern Ontario

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Displaying the top FoodSpend categories of expenditure on food purchased from stores.
Benchmark used for Index calculations.

Index Colours:	<80	80 - 110	110+

Post COVID-19 Activities

Trade Area: Ottawa - Vanier BIA

Household Population 14+: 55,049

Activities Look Forward To Doing

	%	Base %	Index
Socializing			
Dating	14.3	11.0	130
Going to restaurants, bars or night clubs	55.3	55.1	100
Having physical Contact with family and friends	57.9	57.7	100
Participating in group activities	38.8	38.7	100
Partying	17.2	15.8	109
Seeing family and friends in person	62.5	62.8	99
Entertainment			
Attending events, festivals or concerts	43.7	42.9	102
Attending sports events (excludes professional sports)	17.6	18.2	97
Attending to professional sports events or games	25.7	25.4	101
Going to the movies	47.6	45.7	104
Movement & Travel			
Driving more	14.0	16.1	87
Shopping in-store	41.9	42.9	98
Spending time outdoors	34.3	32.5	105
Travelling outside of Canada/ abroad	51.7	53.2	97
Travelling within Canada	48.6	49.9	97
Using public transit	18.7	13.7	137
Personal			
Getting back to old habits	35.2	36.2	97
Going to a salon, barber shop or spa	32.4	33.7	96
Going to the gym	23.8	22.6	106
Education/Work			
Children going back to school	16.4	20.3	81
Going back to work	18.4	17.6	105
Other			
Not Stated	0.5	0.6	95

Benchmark: Southern Ontario

(Base used for Index calculations)

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Index Colours:	<80	80 - 110	110+

Media and Social Media Overview

Behavioural | Media Overview

Trade Area: Ottawa - Vanier BIA

Household Population 14+: 55,049

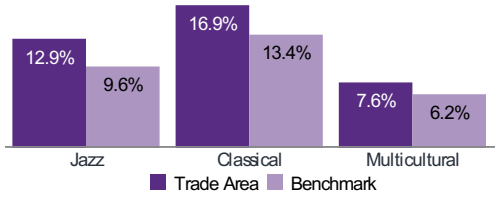
RADIO

Listeners: 72.6%
Index: **90**

6.7 Hours/Week*

Index: **90**

Top Formats**



TELEVISION

Viewers: 95.3%
Index: **100**

21.6 Hours/Week*

Index: **104**

Top Program Types**

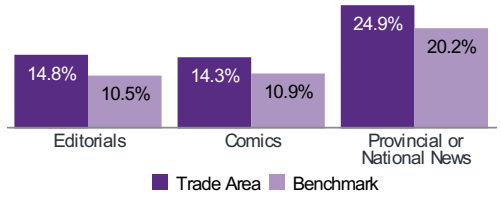
NEWSPAPER

Readers: 32.8%
Index: **100**

0.9 Hours/Week*

Index: **144**

Top Sections Read**



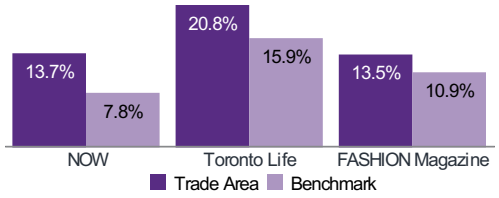
MAGAZINE

Readers: 70.3%
Index: **97**

1.7 Hours/Month*

Index: **123**

Top Titles**



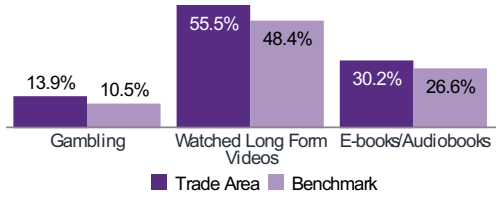
INTERNET

Users: 98.0%
Index: **100**

23.8 Hours online past week*

Index: **109**

Top Activities**

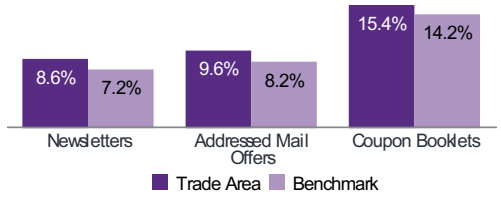


DIRECT/OUTDOOR

5 Times used public transit past week*

Index: **165**

Top DM Formats Used to Plan/Make Purchases**



Benchmark: Southern Ontario

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** Consumption values based to variable's incidence count.*

*** Chosen from index ranking with minimum 5% composition.*

Index Colours:	<80	80 - 110	110+

Opticks Social | Social Media Activities

Trade Area: Ottawa - Vanier BIA

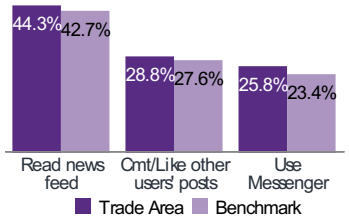
Household Population 18+: 52,988

FACEBOOK

78.7% currently use

Index: **101**

Top Activities (Daily)

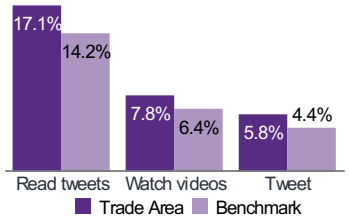


TWITTER

35.3% currently use

Index:**120**

Top Activities (Daily)

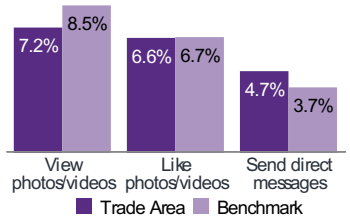


INSTAGRAM

42.8% currently use

Index: **110**

Top Activities (Daily)

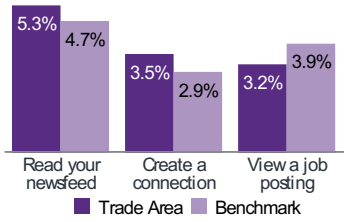


LINKEDIN

45.1% currently use

Index: **109**

Top Activities (Weekly)

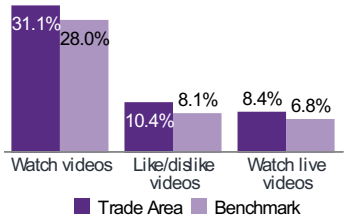


YOUTUBE

72.4% currently use

Index:**103**

Top Activities (Daily)

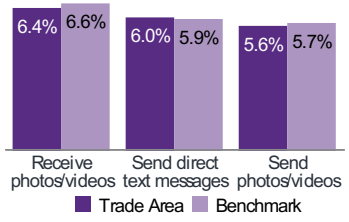


SNAPCHAT

14.5% currently use

Index: **112**

Top Activities (Weekly)

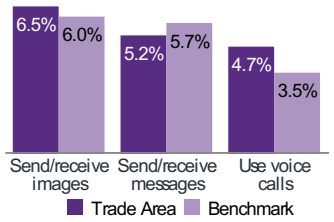


WHATSAPP

47.2% currently use

Index: **110**

Top Activities (Daily)



Benchmark: Southern Ontario

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Chosen and ranked by percent composition

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

Index Colours:	<80	80 - 110	110+

Opticks Social | Social Media Usage

Trade Area: Ottawa - Vanier BIA

Household Population 18+: 52,988

FRIENDS IN ALL SM NETWORKS

32.1%

Index:**91**

0-49 friends

FREQUENCY OF USE (DAILY)

57.0%

Index:**102**

Facebook

BRAND INTERACTION

35.8%

Index:**104**

Like brand on Facebook

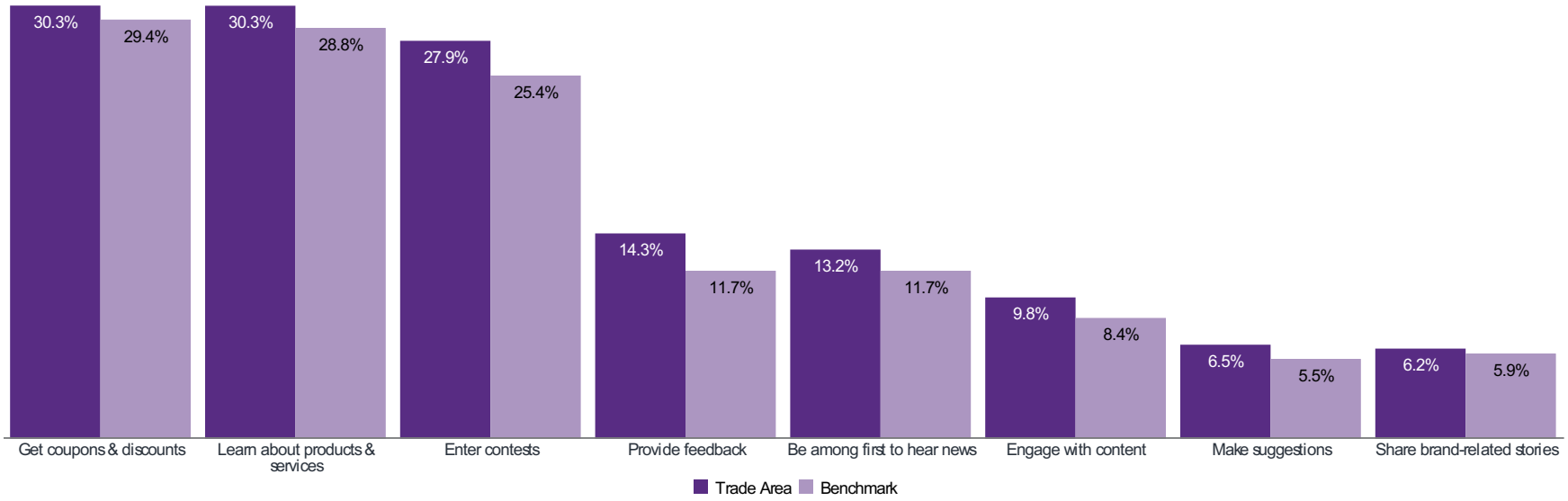
NO. OF BRANDS INTERACTED

29.0%

Index:**95**

2-5 brands

REASONS TO FOLLOW BRANDS USING SOCIAL MEDIA



Benchmark: Southern Ontario

Chosen and ranked by percent composition

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Index Colours:	<80	80 - 110	110+

Online Shopping Attitudes and Behaviours

Opticks eShopper | Online Shopping Attitudes

Trade Area: Ottawa - Vanier BIA

Total Household Population 18+: 52,988

Retail companies should not be allowed to own or share my personal info

% Comp 86.1 Index 98

I am likely to shop online via my mobile device, provided the process is easy

% Comp 47.4 Index 98

I am concerned about sharing my personal info with retail companies due to privacy issues, such as using it for marketing purposes

% Comp 82.2 Index 98

I am likely to download a mobile shopping "app" if it somehow makes my shopping experience easier

% Comp 39.3 Index 96

I use my mobile device to find retail locations that sell products I am looking to buy

% Comp 55.9 Index 99

I am open to receiving relevant marketing messages on my mobile device from retailers I trust

% Comp 29.2 Index 97

Benchmark: Southern Ontario

Ranked by percent composition.

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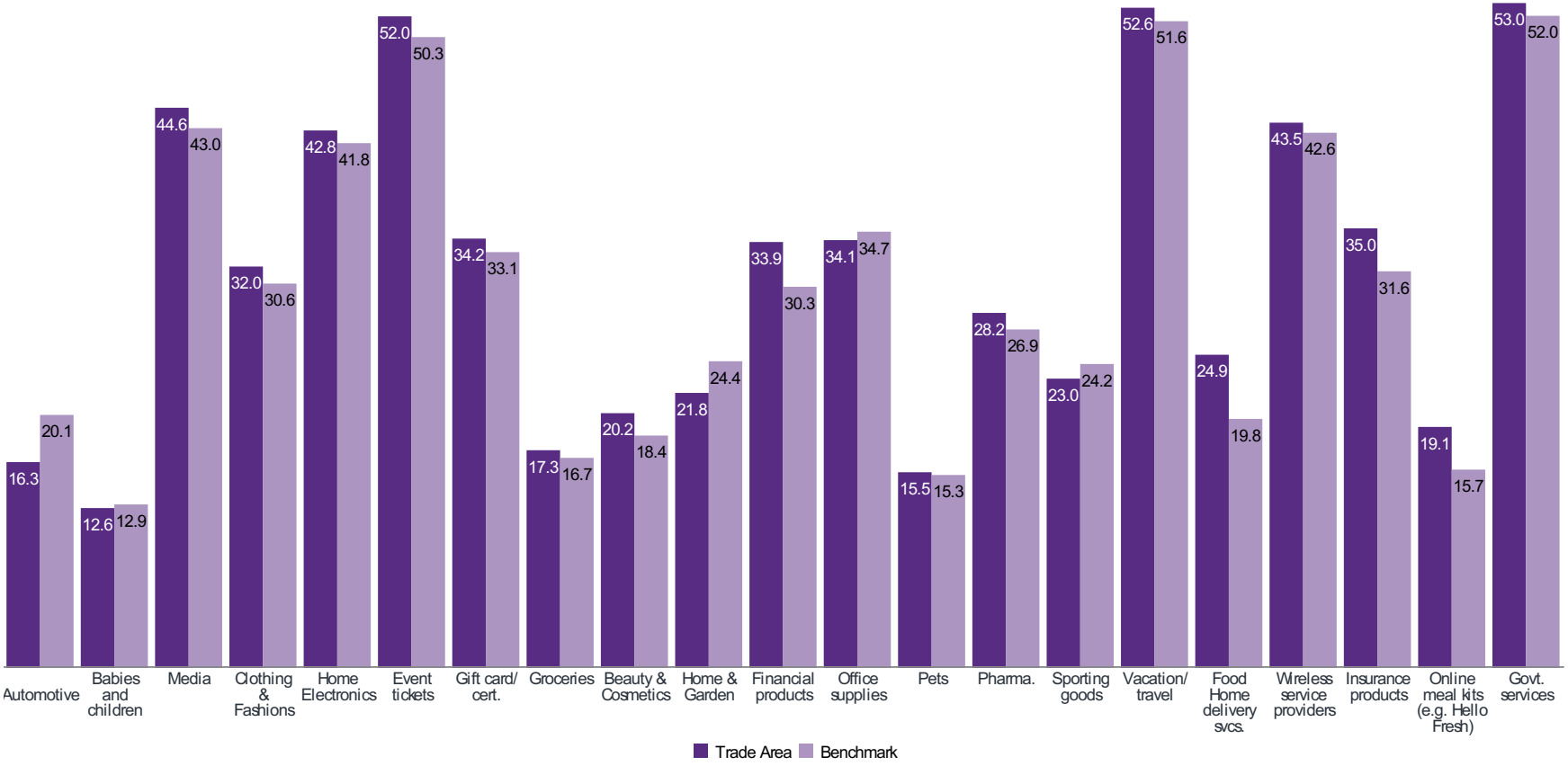
Index Colours:	<80	80 - 110	110+

Opticks eShopper | Purchase Preference by Category

Trade Area: Ottawa - Vanier BIA

Total Household Population 18+:52,988

ONLINE PURCHASE PREFERENCE BY CATEGORY - VIA COMPUTER (%)



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Index Colours:	<80	80 - 110	110+

Opticks eShopper | Clothing & Fashions Deep Dive

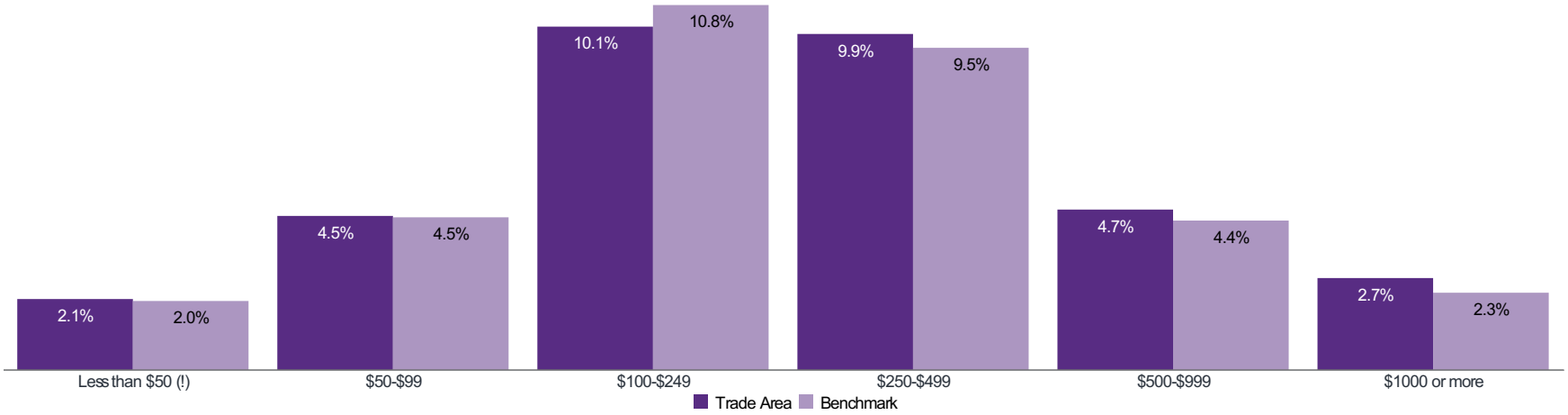
Trade Area: Ottawa - Vanier BIA

Total Household Population 18+: 52,988

BEHAVIOURAL PREFERENCES BY CHANNEL

CLOTHING & FASHIONS	In person, at store, branch or office	Online/Website via computer	Online/Website via mobile device	By talking to someone on phone
Gather information	62.0% Index:101	40.3% Index:109	13.7% Index:111	2.4% Index:76
Purchase preference	75.7% Index:100	32.0% Index:104	9.3% Index:94	3.0% Index:118
Customer Service	61.5% Index:100	20.2% Index:113	6.4% Index:111	20.6% Index:95

AMOUNT SPENT [PST 12 MTHS]



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

Index Colours:	<80	80 - 110	110+

Opticks eShopper | Home Electronics & Computers Deep Dive

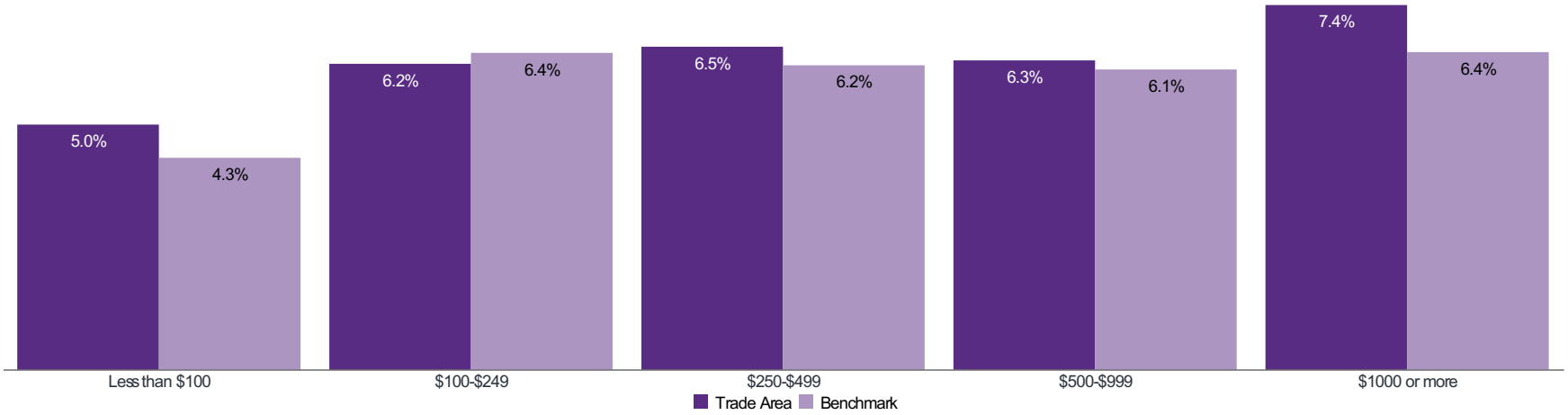
Trade Area: Ottawa - Vanier BIA

Total Household Population 18+: 52,988

BEHAVIOURAL PREFERENCES BY CHANNEL

HOME ELECTRONICS & COMPUTERS	In person, at store, branch or office	Online/Website via computer	Online/Website via mobile device	By talking to someone on phone
Gather information	50.4% Index:100	55.6% Index:102	15.8% Index: 101	8.3% Index: 101
Purchase preference	65.2% Index: 95	42.8% Index:102	12.2% Index:111	6.5% Index: 101
Customer Service	54.2% Index:96	29.1% Index:117	9.0% Index: 121	36.1% Index: 98

AMOUNT SPENT [PST 12 MTHS]



Benchmark: Southern Ontario

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

Index Colours:	<80	80 - 110	110+

Opticks eShopper | Gift Cards Deep Dive

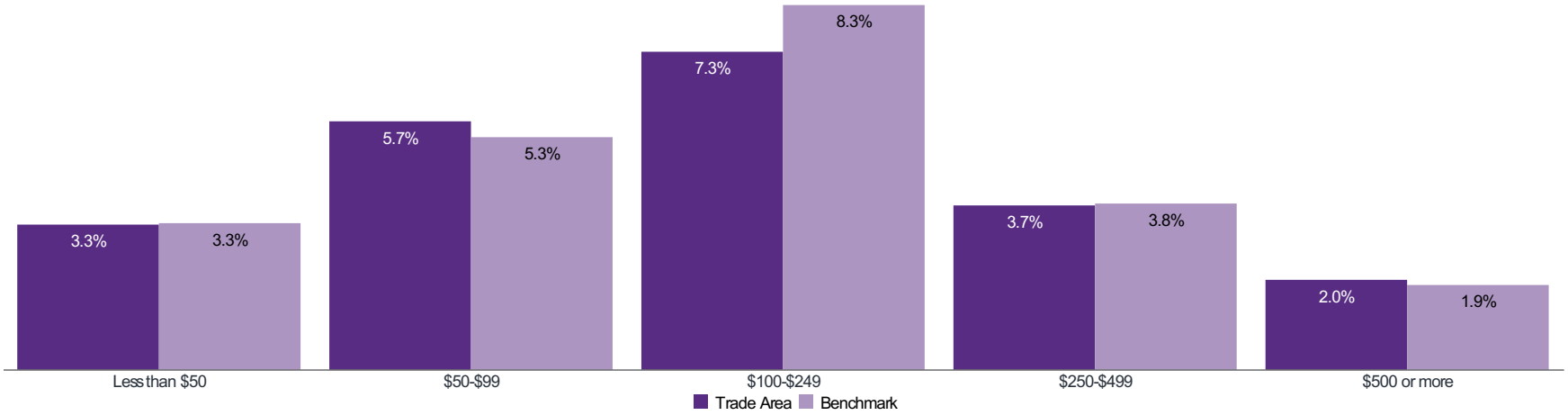
Trade Area: Ottawa - Vanier BIA

Total Household Population 18+: 52,988

BEHAVIOURAL PREFERENCES BY CHANNEL

GIFT CARDS	In person, at store, branch or office	Online/Website via computer	Online/Website via mobile device	By talking to someone on phone
Gather information	44.3% Index:93	37.0% Index:105	10.9% Index:99	3.4% Index:95
Purchase preference	54.8% Index:91	34.2% Index:103	8.8% Index:101	3.1% Index:102
Customer Service	38.2% Index:90	23.2% Index:113	7.1% Index:116	25.7% Index:93

AMOUNT SPENT [PST 12 MTHS]



Benchmark: Southern Ontario

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

Index Colours:	<80	80 - 110	110+

Opticks eShopper | Groceries Deep Dive

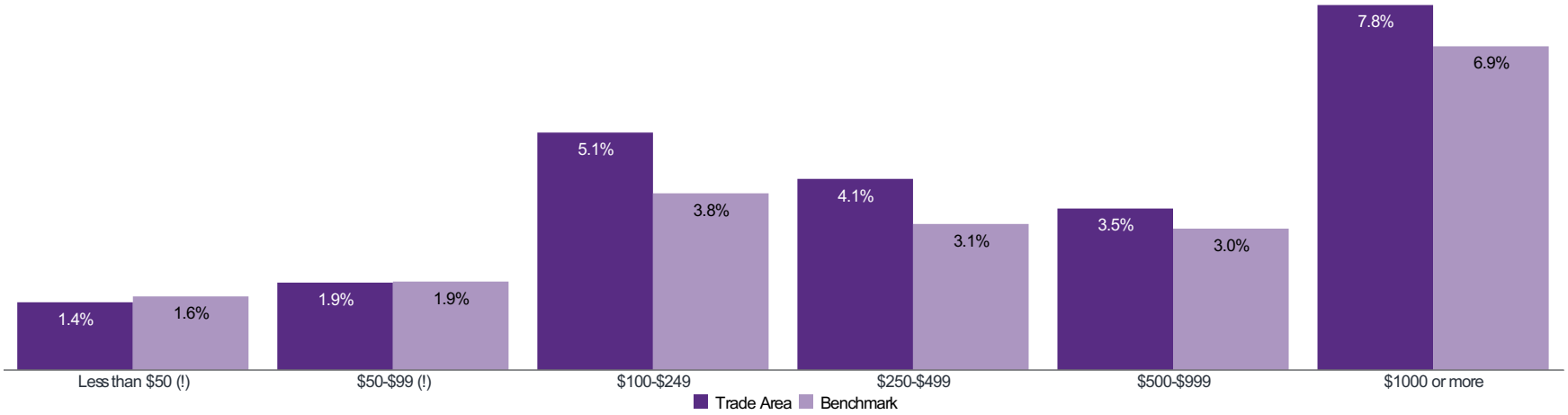
Trade Area: Ottawa - Vanier BIA

Total Household Population 18+: 52,988

BEHAVIOURAL PREFERENCES BY CHANNEL

GROCERIES	In person, at store, branch or office	Online/Website via computer	Online/Website via mobile device	By talking to someone on phone
Gather information	72.6% Index:101	26.9% Index:109	10.6% Index:95	3.0% Index:110
Purchase preference	82.9% Index:99	17.3% Index:104	6.5% Index:105	2.4% Index:97
Customer Service	68.4% Index:98	13.5% Index:118	4.3% Index:109	18.9% Index:101

AMOUNT SPENT [PST 12 MTHS]



Benchmark: Southern Ontario

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

Index Colours:	<80	80 - 110	110+

Opticks eShopper | Beauty & Cosmetics Deep Dive

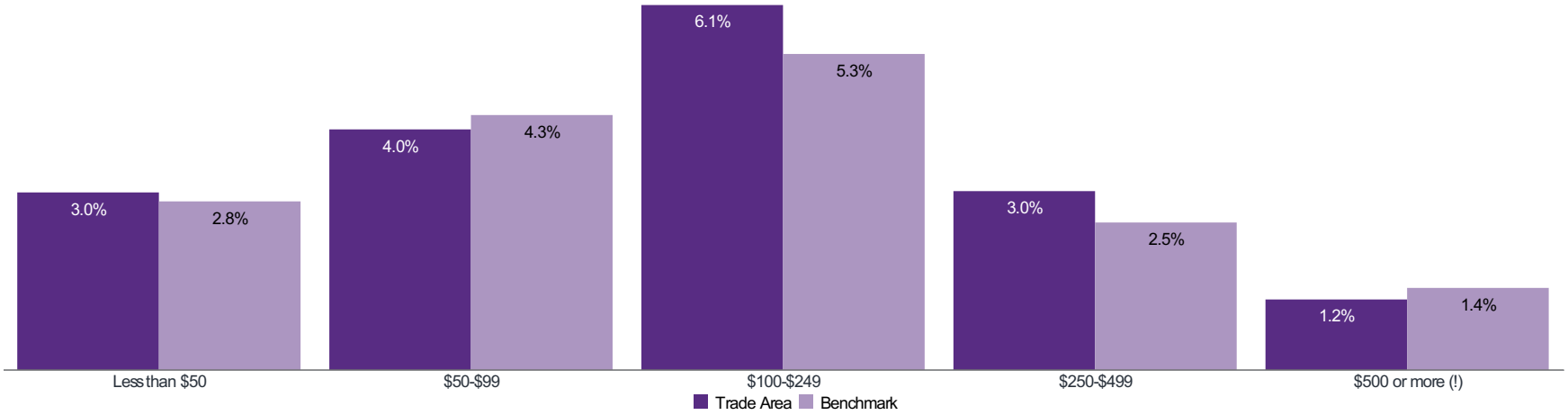
Trade Area: Ottawa - Vanier BIA

Total Household Population 18+: 52,988

BEHAVIOURAL PREFERENCES BY CHANNEL

BEAUTY & COSMETICS	In person, at store, branch or office	Online/Website via computer	Online/Website via mobile device	By talking to someone on phone
Gather information	39.8% Index:112	25.5% Index:116	8.9% Index:110	3.2% Index:112
Purchase preference	50.1% Index:108	20.2% Index:110	6.8% Index:107	2.6% Index:115
Customer Service	38.7% Index:107	14.8% Index:118	4.7% Index:109	14.8% Index:101

AMOUNT SPENT [PST 12 MTHS]



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

Index Colours:	<80	80 - 110	110+

Opticks eShopper | Home & Garden Deep Dive

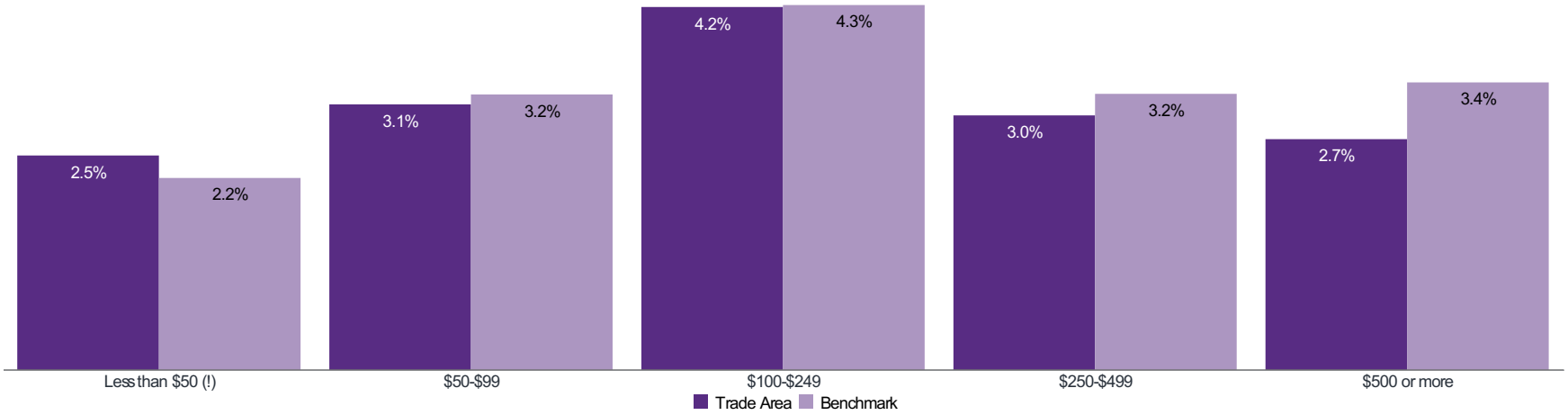
Trade Area: Ottawa - Vanier BIA

Total Household Population 18+: 52,988

BEHAVIOURAL PREFERENCES BY CHANNEL

HOME & GARDEN	In person, at store, branch or office	Online/Website via computer	Online/Website via mobile device	By talking to someone on phone
Gather information	47.1% Index:91	35.2% Index:93	10.5% Index:92	4.2% Index:73
Purchase preference	61.1% Index:90	21.8% Index:90	7.0% Index:100	3.2% Index:90
Customer Service	48.1% Index:89	17.4% Index:109	4.9% Index:102	18.7% Index:82

AMOUNT SPENT [PST 12 MTHS]



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

Index Colours:	<80	80 - 110	110+

Opticks eShopper | Sporting Goods Deep Dive

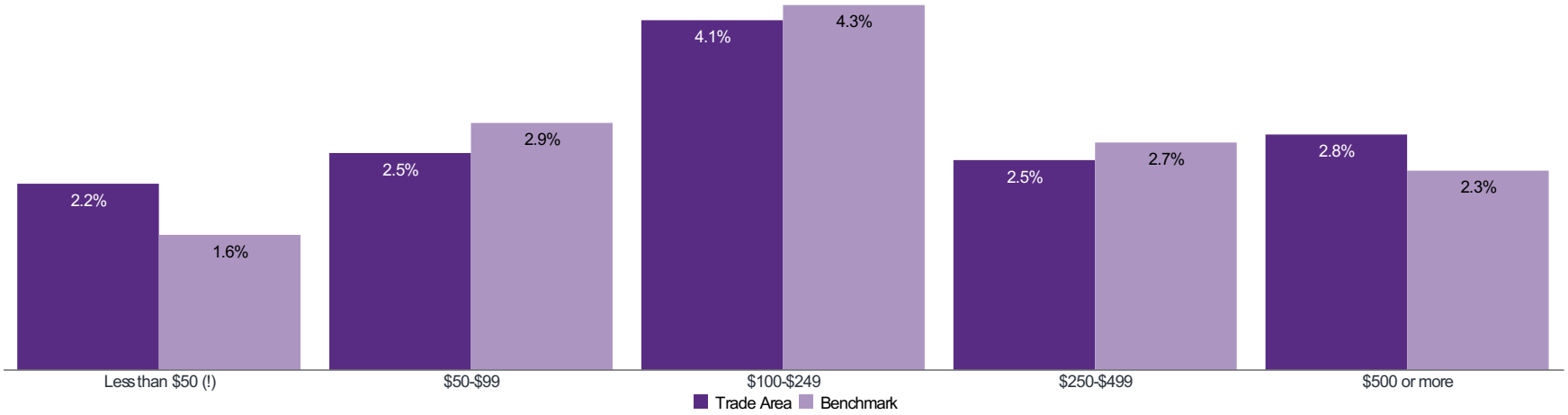
Trade Area: Ottawa - Vanier BIA

Total Household Population 18+: 52,988

BEHAVIOURAL PREFERENCES BY CHANNEL

SPORTING GOODS	In person, at store, branch or office	Online/Website via computer	Online/Website via mobile device	By talking to someone on phone
Gather information	36.4% Index:93	32.4% Index:101	10.1% Index:96	4.0% Index:101
Purchase preference	47.6% Index:92	23.0% Index:95	7.3% Index:97	3.1% Index:101
Customer Service	40.0% Index:96	17.1% Index:113	5.7% Index:112	17.3% Index:84

AMOUNT SPENT [PST 12 MTHS]



Benchmark: Southern Ontario

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

Index Colours:	<80	80 - 110	110+

Opticks eShopper | Vacation/Travel Deep Dive

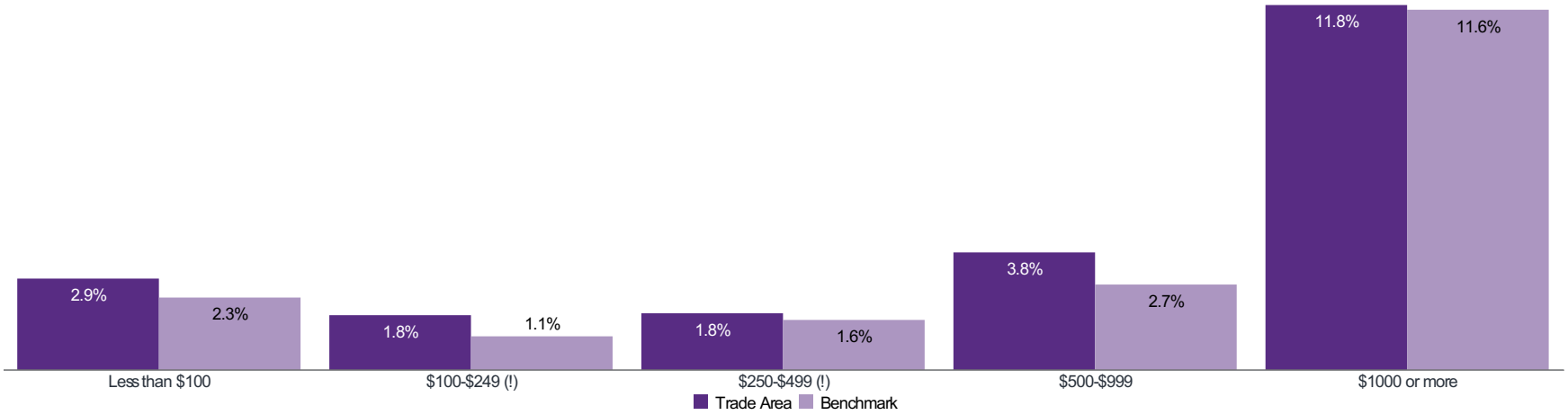
Trade Area: Ottawa - Vanier BIA

Total Household Population 18+: 52,988

BEHAVIOURAL PREFERENCES BY CHANNEL

VACATION/ TRAVEL	In person, at store, branch or office	Online/Website via computer	Online/Website via mobile device	By talking to someone on phone
Gather information	18.4% Index:90	59.4% Index:103	17.2% Index:115	13.4% Index:83
Purchase preference	26.0% Index:90	52.6% Index:102	7.0% Index:116	14.6% Index:82
Customer Service	27.5% Index:94	31.4% Index:114	8.0% Index:115	42.0% Index:96

AMOUNT SPENT [PST 12 MTHS]



Benchmark: Southern Ontario

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

Index Colours:	<80	80 - 110	110+

Store Loyalty

ShopperChoice | Store Loyalty - Assortment / Product Quality

Trade Area: Ottawa - Vanier BIA

Households:31,092

STORE LOYALTY INFLUENCES - HIGHLY INFLUENTIAL

ASSORTMENT / PRODUCT QUALITY

Has products I want/regularly in stock

68.8%
Index:101

Has high quality fresh produce

59.5%
Index:100

Carries food/non-food items I need

43.3%
Index:105

Has high quality meat department

41.1%
Index:98

Carries variety of items and services

37.4%
Index:104

Only store that carries what I want

32.2%
Index:106

Carries wide variety of ethnic prod.

18.0%
Index:135

Has variety of freshly prep. foods/meals

15.8%
Index:114

Carries variety of organic prod. (!)

11.9%
Index:106

Has special section for dietary needs

11.0%
Index:89

Carries selection of alcoholic bev. (^)

5.6%
Index:148

Benchmark: Southern Ontario

(!) Represents low sample size. Please analyze with discretion.

(^) Represents extremely low sample size. Please analyze with discretion.

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Index Colours:	<80	80 - 110	110+

ShopperChoice | Store Loyalty - Shopping Experience

Trade Area: Ottawa - Vanier BIA

Households:31,092

STORE LOYALTY INFLUENCES - HIGHLY INFLUENTIAL

CONVENIENCE / SHOPPING EXPERIENCE

Convenient location for me

66.8%
Index:112

Easy to get in and get out quickly

44.5%
Index:103

Organized layout makes it easy to shop

43.6%
Index:105

Staff are friendly and knowledgeable

35.3%
Index:104

Short checkout lines/fast checkout

34.0%
Index:95

Has extended hours

26.7%
Index:97

I like the store ambiance

23.2%
Index:116

Has self-checkout

13.5%
Index:98

Offers an online shopping option (!)

9.0%
Index:102

Benchmark: Southern Ontario

(!) Represents low sample size. Please analyze with discretion.

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Index Colours:	<80	80 - 110	110+

ShopperChoice | Store Loyalty - Price and Promo

Trade Area: Ottawa - Vanier BIA

Households:31,092

STORE LOYALTY INFLUENCES - HIGHLY INFLUENTIAL

PRICE AND PROMO

Discover good value when shopping

66.4%

Index:100

Store has great sales and promotions

64.8%

Index:96

Store has the lowest prices overall

59.7%

Index:103

Store has a customer loyalty card program

45.9%

Index:93

Has loyalty prog. app and offers pers. promos

27.3%

Index:93

I'm loyal to their store brands

22.6%

Index:98

OUT OF STOCK ITEM

	% Base	% Pen	Index
Psychographics - Shopping Preferences			
Postpone the purchase	45.0	40.2	0.9	112
Leave the store and buy it elsewhere	29.4	30.9	0.7	95
Purchase another brand	18.3	21.2	0.7	86
Purchase another size or variety of the same brand (!)	7.3	7.7	0.7	94

Benchmark: Southern Ontario

(!) Represents low sample size. Please analyze with discretion.

(^) Represents extremely low sample size. Please analyze with discretion.

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Index Colours:	<80	80 - 110	110+

Main Street Visitors

2019 Ottawa - Vanier BIA Visitors by Top 10 Census Subdivisions

Compared to Total Household Population 15+

Benchmark: Ontario and Quebec

CSD Code	Census Subdivision Name	Total Household Population 15+		Spring 2019				Summer 2019				Fall 2019				Winter 2019				Full Year 2019			
		#	% of Total	#	% of Total	% Pen	Index	#	% of Total	% Pen	Index	#	% of Total	% Pen	Index	#	% of Total	% Pen	Index	#	% of Total	% Pen	Index
Total		**19,302,713**	**100%**	**591,562**	**100%**	**3.06%**	**100**	**605,646**	**100%**	**3.14%**	**100**	**483,886**	**100%**	**2.51%**	**100**	**512,039**	**100%**	**2.65%**	**100**	**853,057**	**100%**	**4.42%**	**100**
3506008	Ottawa, ON (CV)	873,210	4.52%	329,060	55.63%	37.68%	1230	324,664	53.61%	37.18%	1185	280,577	57.98%	32.13%	1282	296,717	57.95%	33.98%	1281	425,766	49.91%	48.76%	1103
2481017	Gatineau, QC (V)	237,634	1.23%	92,790	15.69%	39.05%	1274	88,947	14.69%	37.43%	1193	83,682	17.29%	35.21%	1405	81,288	15.88%	34.21%	1290	120,845	14.17%	50.85%	1151
2466023	Montréal, QC (V)	1,493,156	7.74%	15,932	2.69%	1.07%	35	18,032	2.98%	1.21%	38	10,695	2.21%	0.72%	29	11,568	2.26%	0.77%	29	30,614	3.59%	2.05%	46
3520005	Toronto, ON (C)	2,568,898	13.31%	10,890	1.84%	0.42%	14	13,037	2.15%	0.51%	16	7,544	1.56%	0.29%	12	7,641	1.49%	0.30%	11	23,635	2.77%	0.92%	21
3502036	Clarence-Rockland, ON (C)	21,875	0.11%	8,736	1.48%	39.94%	1303	9,222	1.52%	42.16%	1344	7,503	1.55%	34.30%	1368	8,319	1.62%	38.03%	1434	11,119	1.30%	50.83%	1150
3502048	Russell, ON (TP)	14,736	0.08%	6,212	1.05%	42.15%	1375	5,621	0.93%	38.15%	1216	4,479	0.93%	30.39%	1212	5,232	1.02%	35.50%	1338	7,713	0.90%	52.34%	1184
3521005	Mississauga, ON (CY)	642,951	3.33%	3,172	0.54%	0.49%	16	3,894	0.64%	0.61%	19	1,791	0.37%	0.28%	11	1,873	0.37%	0.29%	11	6,641	0.78%	1.03%	23
2465005	Laval, QC (V)	358,900	1.86%	3,070	0.52%	0.86%	28	3,450	0.57%	0.96%	31	1,787	0.37%	0.50%	20	2,475	0.48%	0.69%	26	6,146	0.72%	1.71%	39
3501012	Cornwall, ON (CY)	38,346	0.20%	3,229	0.55%	8.42%	275	3,490	0.58%	9.10%	290	2,203	0.46%	5.75%	229	2,168	0.42%	5.65%	213	5,748	0.67%	14.99%	339
3502025	The Nation / La Nation, ON (M)	10,967	0.06%	3,818	0.65%	34.82%	1136	4,081	0.67%	37.21%	1186	3,339	0.69%	30.45%	1215	3,865	0.75%	35.24%	1328	5,702	0.67%	51.99%	1176

Index Legend	Under 80	110 to 119	120 to 149	Over 150

2019 Ottawa - Vanier BIA Visitors Within Trade Area

Compared to Total Household Population 15+

Benchmark: 15 min trade area

Total Household Population 15+	Spring 2019 Visitors		Summer 2019 Visitors		Fall 2019 Visitors		Winter 2019 Visitors		Full Year 2019 Visitors	
	#	% Pen	#	% Pen	#	% Pen	#	% Pen	#	% Pen
54,512	40,904	75.0	39,747	72.9	40,772	74.8	39,234	72.0	45,743	83.9

2019 Ottawa - Vanier BIA Visitors Within vs Outside Trade Area

Benchmark: Canada

Year	Total Visitors in Main Street Polygon	# Visitors Within 15 min TA	% Visitors Within 15 min TA	# Visitors Outside 15 min TA	% Visitors Outside 15 min TA
Full Year 2019	877,087	45,743	5.2	831,344	94.8

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2020 Ottawa - Vanier BIA Visitors by Top 10 Census Subdivisions

Compared to Total Household Population 15+

Benchmark: Ontario and Quebec

CSD Code	Census Subdivision Name	Total Household Population 15+		Spring 2020				Summer 2020				Fall 2020				Winter 2020				Full Year 2020			
		#	% of Total	#	% of Total	% Pen	Index	#	% of Total	% Pen	Index	#	% of Total	% Pen	Index	#	% of Total	% Pen	Index	#	% of Total	% Pen	Index
Total		**19,302,713**	**100%**	**318,675**	**100%**	**1.65%**	**100**	**421,912**	**100%**	**2.19%**	**100**	**350,342**	**100%**	**1.81%**	**100**	**414,822**	**100%**	**2.15%**	**100**	**612,590**	**100%**	**3.17%**	**100**
3506008	Ottawa, ON (CV)	873,210	4.52%	206,855	64.91%	23.69%	1435	239,357	56.73%	27.41%	1254	211,301	60.31%	24.20%	1333	248,101	59.81%	28.41%	1322	338,086	55.19%	38.72%	1220
2481017	Gatineau, QC (V)	237,634	1.23%	52,462	16.46%	22.08%	1337	74,023	17.54%	31.15%	1425	65,721	18.76%	27.66%	1524	70,661	17.03%	29.74%	1384	100,908	16.47%	42.46%	1338
2466023	Montréal, QC (V)	1,493,156	7.74%	3,363	1.06%	0.23%	14	9,621	2.28%	0.64%	29	4,463	1.27%	0.30%	16	7,014	1.69%	0.47%	22	14,836	2.42%	0.99%	31
3520005	Toronto, ON (C)	2,568,898	13.31%	2,746	0.86%	0.11%	6	6,611	1.57%	0.26%	12	4,051	1.16%	0.16%	9	5,596	1.35%	0.22%	10	11,153	1.82%	0.43%	14
3502036	Clarence-Rockland, ON (C)	21,875	0.11%	5,721	1.80%	26.15%	1584	6,419	1.52%	29.35%	1343	6,111	1.74%	27.94%	1539	7,014	1.69%	32.06%	1492	9,644	1.57%	44.09%	1389
3502048	Russell, ON (TP)	14,736	0.08%	3,611	1.13%	24.50%	1484	3,781	0.90%	25.65%	1174	3,112	0.89%	21.12%	1164	4,142	1.00%	28.11%	1308	5,670	0.93%	38.48%	1213
2482015	Val-des-Monts, QC (MÉ)	10,617	0.06%	2,130	0.67%	20.06%	1215	3,377	0.80%	31.81%	1455	2,839	0.81%	26.74%	1473	2,929	0.71%	27.58%	1284	4,754	0.78%	44.78%	1411
3502025	The Nation / La Nation, ON (M)	10,967	0.06%	2,229	0.70%	20.32%	1231	2,844	0.67%	25.93%	1186	2,122	0.61%	19.35%	1066	3,079	0.74%	28.08%	1306	4,319	0.70%	39.38%	1241
2482020	Cantley, QC (MÉ)	9,277	0.05%	1,293	0.41%	13.94%	844	2,568	0.61%	27.68%	1266	2,346	0.67%	25.28%	1393	2,675	0.64%	28.83%	1342	4,062	0.66%	43.79%	1380
2482025	Chelsea, QC (MÉ)	5,948	0.03%	1,754	0.55%	29.49%	1786	2,970	0.70%	49.94%	2285	2,668	0.76%	44.85%	2471	2,474	0.60%	41.59%	1935	3,505	0.57%	58.93%	1857

Index Legend	Under 80	110 to 119	120 to 149	Over 150

2020 Ottawa - Vanier BIA Visitors Within Trade Area

Compared to Total Household Population 15+

Benchmark: 15 min trade area

Total Household Population 15+	Spring 2020 Visitors		Summer 2020 Visitors		Fall 2020 Visitors		Winter 2020 Visitors		Full Year 2020 Visitors	
	#	% Pen	#	% Pen	#	% Pen	#	% Pen	#	% Pen
54,512	38,420	70.5	36,369	66.7	33,765	61.9	37,925	69.6	41,795	76.7

2020 Ottawa - Vanier BIA Visitors Within vs Outside Trade Area

Benchmark: Canada

Year	Total Visitors in Main Street Polygon	# Visitors Within 15 min TA	% Visitors Within 15 min TA	# Visitors Outside 15 min TA	% Visitors Outside 15 min TA
Full Year 2020	620,788	41,795	6.7	578,993	93.3

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2021 Ottawa - Vanier BIA Visitors by Top 10 Census Subdivisions

Compared to Total Household Population 15+

Benchmark: Ontario and Quebec

CSD Code	Census Subdivision Name	Total Household Population 15+		Spring 2021				Summer 2021				Fall 2021				Winter 2021				Full Year 2021			
		#	% of Total	#	% of Total	% Pen	Index	#	% of Total	% Pen	Index	#	% of Total	% Pen	Index	#	% of Total	% Pen	Index	#	% of Total	% Pen	Index
Total		**19,302,713**	**100%**	**286,030**	**100%**	**1.48%**	**100**	**508,819**	**100%**	**2.64%**	**100**	**464,778**	**100%**	**2.41%**	**100**	**361,476**	**100%**	**1.87%**	**100**	**677,020**	**100%**	**3.51%**	**100**
3506008	Ottawa, ON (CV)	873,210	4.52%	184,389	64.46%	21.12%	1425	253,684	49.86%	29.05%	1102	246,949	53.13%	28.28%	1175	221,474	61.27%	25.36%	1354	339,233	50.11%	38.85%	1108
2481017	Gatineau, QC (V)	237,634	1.23%	45,192	15.80%	19.02%	1283	84,100	16.53%	35.39%	1343	85,662	18.43%	36.05%	1497	67,995	18.81%	28.61%	1528	105,048	15.52%	44.21%	1260
2466023	Montréal, QC (V)	1,493,156	7.74%	2,948	1.03%	0.20%	13	13,163	2.59%	0.88%	33	11,191	2.41%	0.75%	31	4,211	1.16%	0.28%	15	20,530	3.03%	1.37%	39
3520005	Toronto, ON (C)	2,568,898	13.31%	4,080	1.43%	0.16%	11	14,911	2.93%	0.58%	22	7,471	1.61%	0.29%	12	3,790	1.05%	0.15%	8	17,841	2.64%	0.69%	20
3502036	Clarence-Rockland, ON (C)	21,875	0.11%	4,954	1.73%	22.65%	1528	7,984	1.57%	36.50%	1385	8,708	1.87%	39.81%	1653	5,633	1.56%	25.75%	1375	10,701	1.58%	48.92%	1395
3502048	Russell, ON (TP)	14,736	0.08%	2,744	0.96%	18.62%	1257	4,490	0.88%	30.47%	1156	4,432	0.95%	30.08%	1249	2,670	0.74%	18.12%	967	5,809	0.86%	39.42%	1124
2465005	Laval, QC (V)	358,900	1.86%	639	0.22%	0.18%	12	4,084	0.80%	1.14%	43	2,636	0.57%	0.73%	31	1,363	0.38%	0.38%	20	5,791	0.86%	1.61%	46
2482015	Val-des-Monts, QC (MÉ)	10,617	0.06%	2,634	0.92%	24.80%	1674	3,973	0.78%	37.42%	1419	3,726	0.80%	35.10%	1458	3,594	0.99%	33.85%	1807	5,715	0.84%	53.83%	1535
3521005	Mississauga, ON (CY)	642,951	3.33%	963	0.34%	0.15%	10	3,844	0.76%	0.60%	23	2,667	0.57%	0.41%	17	1,109	0.31%	0.17%	9	5,212	0.77%	0.81%	23
2482020	Cantley, QC (MÉ)	9,277	0.05%	1,729	0.60%	18.64%	1258	3,751	0.74%	40.43%	1534	3,796	0.82%	40.92%	1699	2,149	0.59%	23.16%	1237	4,470	0.66%	48.18%	1374

Index Legend	Under 80	110 to 119	120 to 149	Over 150

2021 Ottawa - Vanier BIA Visitors Within Trade Area

Compared to Total Household Population 15+

Benchmark: 15 min trade area

Total Household Population 15+	Spring 2021 Visitors		Summer 2021 Visitors		Fall 2021 Visitors		Winter 2021 Visitors		Full Year 2021 Visitors	
	#	% Pen	#	% Pen	#	% Pen	#	% Pen	#	% Pen
54,512	26,359	48.4	33,717	61.9	37,255	68.3	33,488	61.4	38,219	70.1

2021 Ottawa - Vanier BIA Visitors Within vs Outside Trade Area

Benchmark: Canada

Year	Total Visitors in Main Street Polygon	# Visitors Within 15 min TA	% Visitors Within 15 min TA	# Visitors Outside 15 min TA	% Visitors Outside 15 min TA
Full Year 2021	690,660	38,219	5.5	652,441	94.5

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PRIZM Profile | Top Segments

Customers: Ottawa Vanier BIA - FY2021: Sum_Unique_Visitors

Total Customers: 426,640

Top 5 segments represent 30.5% of customers in Southern Ontario

Rank:	1
Customers:	30,526
Customers %:	7.16
% in Benchmark:	3.76
Index:	190

The middle-aged families of Multicultural Corners create an exceptionally diverse portrait. More than a third of households contain foreign-born residents—from the Caribbean, Central America, Europe and Asia—though no one culture dominates. About a fifth of the population speak a non-official language and more than 40 percent identify as visible minorities—including black, Latin American, Arabic and South Asian. Having immigrated to Canada before 2000, these first and second generation Canadians have moved beyond gateway communities to the urban fringe areas of cities like Toronto, Calgary, Ottawa and Edmonton. They've turned their moderate educations into upper-middle-class incomes earned from service sector and white-collar jobs. They typically own single-detached and row houses suitable for their relatively large families with older children; more than a third of households contain four or more people. In these neighbourhoods where one of the stronger values is Financial Security, residents have been more mindful of their spending due to the economic uncertainty caused by COVID-19. With that said, in normal times they enjoy travelling and tend to stay at all-inclusive resorts and book cultural trips and eco-tours.

Rank:	2
Customers:	28,254
Customers %:	6.62
% in Benchmark:	3.30
Index:	201

With one of the highest percentages of suburban households, Modern Suburbia is a magnet for younger and middle-aged, diverse families with young children. Many of these acculturated households contain first- and second-generation Canadians from Asia and South Asia who arrived in their 20s and 30s and have recently moved to new suburbs near large cities like Toronto, Edmonton, Calgary, Ottawa and Vancouver. More than half the population identify as visible minorities: More than twice the national average identify as Asian, and nearly three times the average identify as South Asian. With their university and college educations, they earn upper-middle-class incomes from a wide range of jobs that afford them new single-family, semi-detached or row houses. And few segments are more mobile: the number of residents who have moved in the last five years is nearly 70 percent above average. Modern Suburbia members have crafted active lifestyles for their relatively large families and participate in many team sports, including basketball and hockey. For a splurge, they head to kid-friendly venues such as amusement parks, zoos and aquariums, admitting that Attraction for Crowds is among their strongest values.

Rank:	3
Customers:	24,636
Customers %:	5.77
% in Benchmark:	2.51
Index:	230

Emblematic of Canadian's aging society, Mature & Secure consists of older and mature couples and families aging in place in urban fringe neighbourhoods. Nearly 60 percent of the maintainers are over 55 years old. About 80 percent of this segment's households are found in Canada's largest markets: Toronto, Montreal, Vancouver, Calgary, Ottawa and Edmonton. Many contain first- and second-generation Canadians, the immigrants having arrived between 1990 and 2010. And one in eight residents is Jewish, the highest percentage among all segments and more than 11 times the national average. Well educated with university degrees, those still in the workforce earn upscale incomes from management and white-collar positions in business, finance, science and education. Longtime homeowners, they live in stylish houses and duplexes built between 1960 and 1990 and valued at over $800,000. With a high level of financial security, Mature & Secure residents tend to own investments, real estate and imported luxury cars. Yet they also express a desire to provide a secure future for their children and grandchildren (Legacy).

Rank:	4
Customers:	24,283
Customers %:	5.69
% in Benchmark:	4.16
Index:	137

An upscale suburban lifestyle, First-Class Families is characterized by sprawling families—more than 40 percent of households contain four or more people—living in close-in suburbs. More than half the households are located in established neighbourhoods in Toronto, Calgary, Ottawa and Vancouver. In First-Class Families, the parents are middle-aged, the children are 5-24 and nearly 90 percent of households live in pricey, single-family houses. With their solid educations, the adults hold white-collar jobs in management, education and government, and earn incomes that are nearly twice the national average. One quarter of households contain second-generation Canadians; the segment scores high for members for whom Italian, Polish, Greek or Mandarin is their mother tongue. These families enjoy many team sports—baseball, basketball, football, hockey, volleyball—as both participants and spectators. And many families look forward to weekends when they can shop, go out to eat or relax with their tablet to watch Netflix or indulge in e-commerce. Committed to living a healthy and wholesome lifestyle, this group scores high for the value Effort Toward Health.

Rank:	5
Customers:	22,380
Customers %:	5.25
% in Benchmark:	2.75
Index:	191

An aging lifestyle, Savvy Seniors is home to older singles, couples and divorced or widowed individuals found mostly in cities throughout Ontario, British Columbia and Alberta. Many of these seniors are financially comfortable: With a mix of high school, college and university educations, they enjoy upper-middle-incomes and homes valued at nearly a half-million dollars. Nearly 40 percent of the maintainers are over 65 years old, and they gravitate to easy-to-maintain high-rise apartment buildings, condos and row houses, typically built between 1980 and 2000. More than half of the households consist of third-plus-generation Canadians, and many are empty-nesters; any children at home are typically in their twenties. About 58 percent of the adults are still in the labour force, holding upper-level positions in the sciences, education, the arts and public administration. Still fit and active, these residents have the time and money for travel, golf and fitness activities. And they still believe in the value of Community Involvement, staying active in social issues and political campaigns.

Benchmark: Southern Ontario

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Index Colours:	<80	80 - 110	110+