

Community Profile: Sarnia – Downtown Sarnia

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

The logo for Environics Analytics is displayed within a solid purple rectangular box. The word "ENVIRONICS" is written in a large, bold, white, sans-serif font. Below it, the word "ANALYTICS" is written in a smaller, white, sans-serif font.

ENVIRONICS
ANALYTICS

Confidential

Date: February 16, 2022

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Sarnia - Downtown Sarnia
Main Street Boundary and Trade Area



Demographics, PRIZM Profile, and Psychographics

Demographics | Population & Households

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Trade Area: Sarnia - Downtown Sarnia

POPULATION

10,230

HOUSEHOLDS

5,564

MEDIAN MAINTAINER AGE

55

Index: 102

MARITAL STATUS



42.2%

Index: 73

Married/Common-Law

FAMILY STATUS*

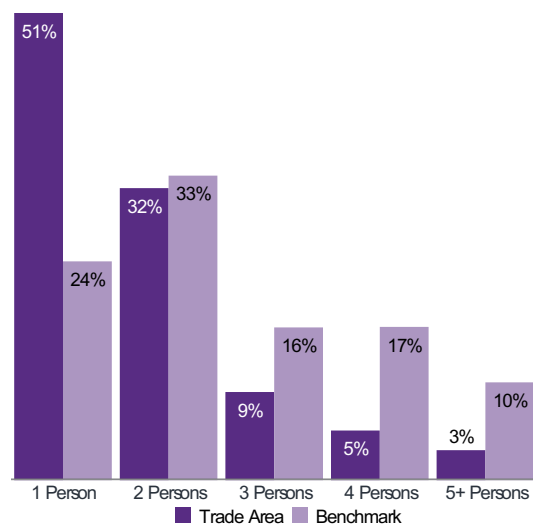


25.2%

Index: 159

Total Lone-Parent Families

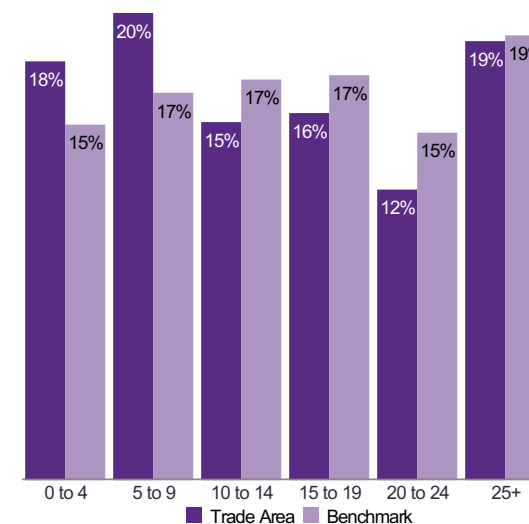
HOUSEHOLD SIZE



POPULATION BY AGE

	Count	%	Index
0 to 4	395	3.9	76
5 to 9	432	4.2	78
10 to 14	368	3.6	63
15 to 19	379	3.7	63
20 to 24	623	6.1	91
25 to 29	983	9.6	137
30 to 34	745	7.3	109
35 to 39	589	5.8	89
40 to 44	525	5.1	83
45 to 49	480	4.7	75
50 to 54	607	5.9	90
55 to 59	786	7.7	106
60 to 64	831	8.1	121
65 to 69	756	7.4	131
70 to 74	565	5.5	115
75 to 79	433	4.2	128
80 to 84	325	3.2	146
85+	405	4.0	179

AGE OF CHILDREN AT HOME



Benchmark: Southern Ontario

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*Chosen from index ranking with minimum 5% composition

Index Colours: <80 80 - 110 110+

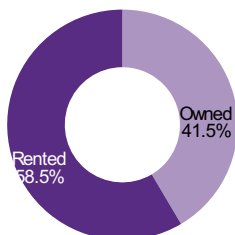
Demographics | Housing & Income

ENVIRONICS
ANALYTICS

Trade Area: Sarnia - Downtown Sarnia

Population: 10,230 | Households: 5,564

TENURE



STRUCTURE TYPE



Houses

43.3%

Index: **56**



Apartments

56.4%

Index: **255**

AGE OF HOUSING*

60+ Years Old

% Comp: **54.1** Index: **262**

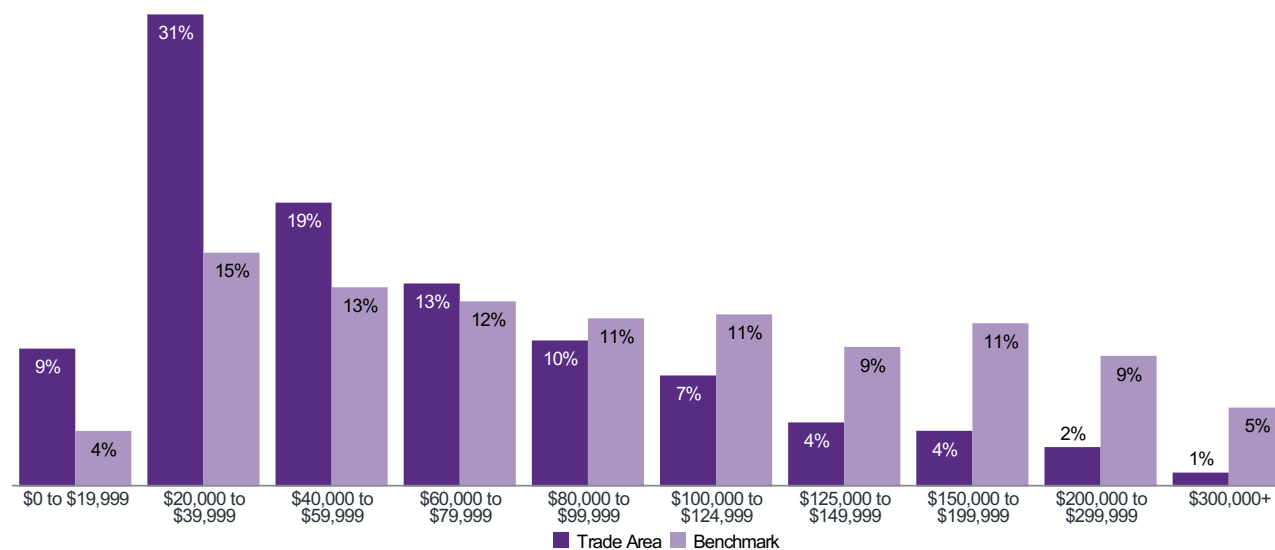
AVERAGE HOUSEHOLD INCOME



\$65,945

Index: **57**

HOUSEHOLD INCOME DISTRIBUTION



Benchmark: Southern Ontario

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Demographics | Education & Employment

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Trade Area: Sarnia - Downtown Sarnia

Population: 10,230 | Households: 5,564

EDUCATION



13.3%

Index:50

University Degree

LABOUR FORCE PARTICIPATION



53.8%

Index:83

Participation Rate

METHOD OF TRAVEL TO WORK: TOP 2*



25.4%

Index:70

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

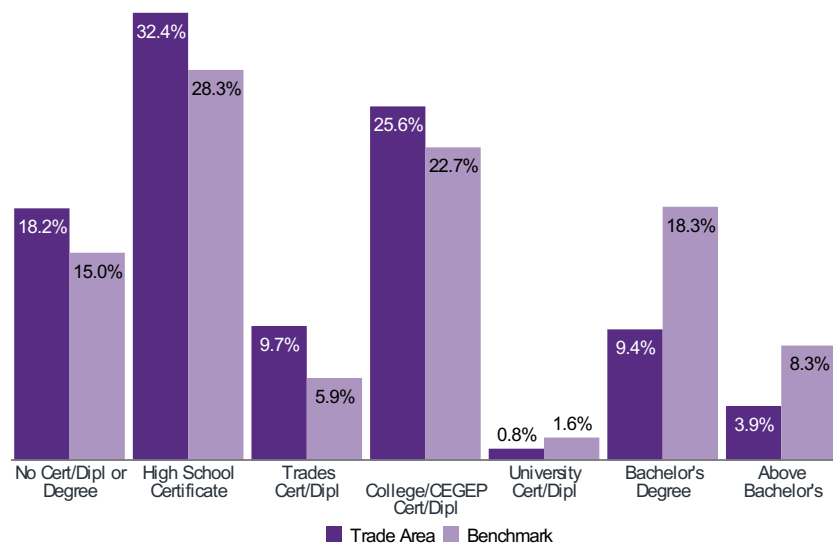


3.1%

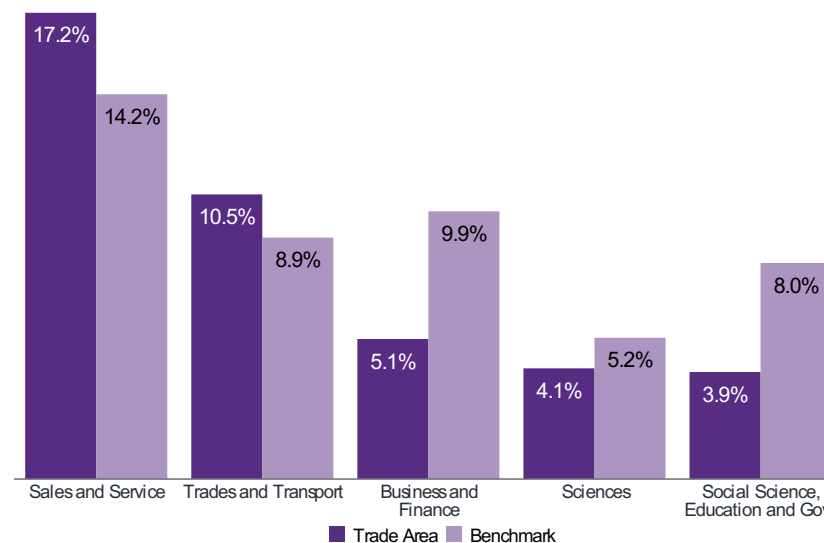
Index:102

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

EDUCATIONAL ATTAINMENT



OCCUPATIONS: TOP 5*



Benchmark: Southern Ontario

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*Ranked by percent composition

Index Colours: <80 80 - 110 110+

Demographics | Diversity

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Trade Area: Sarnia - Downtown Sarnia

Population: 10,230 | Households: 5,564

ABORIGINAL IDENTITY



6.4%

Index: 271

VISIBLE MINORITY PRESENCE



5.9%

Index: 20

Belong to a
visible minority group

NON-OFFICIAL LANGUAGE



0.3%

Index: 13

No knowledge of
English or French

IMMIGRATION



10.5%

Index: 40

Born outside Canada

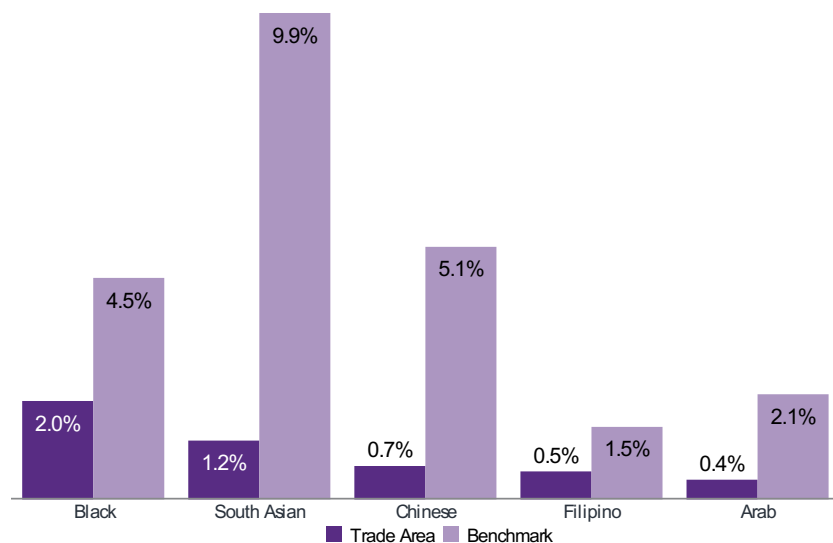
PERIOD OF IMMIGRATION*

Before 2001

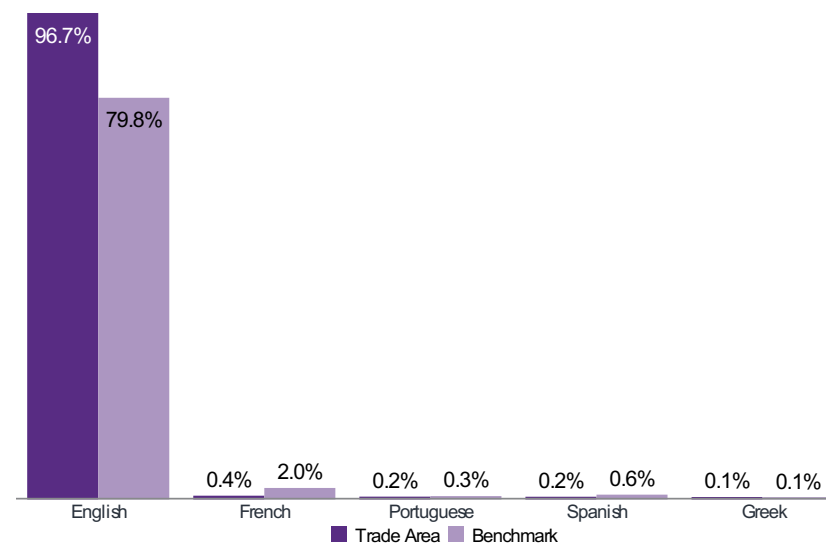
8.1%

Index: 58

VISIBLE MINORITY STATUS: TOP 5**



LANGUAGES SPOKEN AT HOME: TOP 5**



Benchmark: Southern Ontario

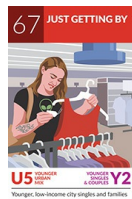
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*Chosen from index ranking with minimum 5% composition

**Ranked by percent composition

Index Colours: <80 80 - 110 110+

Top 5 segments represent **89.4%** of households in Sarnia - Downtown Sarnia



Rank: 1
Hhlds: 1,484
Hhld %: 26.68
% in Benchmark: 3.49
Index: 764

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: 2
Hhlds: 1,220
Hhld %: 21.92
% in Benchmark: 2.72
Index: 805

Value Villagers is a working-class group found typically in the older, industrial neighbourhoods of midsize cities. The households consist of an eclectic mélange of singles, couples and lone-parent families, maintainers of almost any age, and residents with educations ranging from grade 9 to college. In many ways, Value Villagers is a microcosm of Canada, with residents' marital status, household size and mobility rates all reflecting national averages. Even the average ages of adults and children here match national figures. But the Value Villagers version of Canadian life is decidedly modest. Most adults earn lower-middle incomes from blue-collar and service sector jobs, typically in manufacturing, sales or the trades. Over half the housing stock was built before 1960, and residents typically live in single-detached houses that are valued at half the national average. Value Villagers members relish life's simple pleasures, like carnivals, community theatres and parks. And when the mood strikes, they'll play a friendly game of golf, attend an auto race or visit an art gallery. These third-plus-generation Canadians express a belief in the Canadian government and those in positions of power (Obedience to Authority).



Rank: 3
Hhlds: 1,006
Hhld %: 18.09
% in Benchmark: 1.63
Index: 1,107

Silver Flats is the oldest segment, a collection of suburban neighbourhoods found mostly around large and midsize cities. Home to a mix of third- and second-generation Canadians, nearly half the maintainer population is over 65 years old and two-thirds are retired. No segment has a greater concentration of widows and widowers: 15 percent, or three times the national average. While incomes are downscale, many Silver Flats households are financially sound thanks to modest pensions, government transfers and tidy nest eggs. In their apartments and condos, they enjoy quiet hobbies like reading books, bird-watching, knitting, making crafts and collecting coins and stamps. They can afford to go to sporting events to watch professional baseball, football and golf. And many like to keep fit, taking fitness classes, rowing and fitness walking. With their advancing age, many Silver Flats members make an Effort Toward Health so they can enjoy their retirement years. They also score high for the value Propriety, reflected in their courteous and respectful attitude towards others.



Rank: 4
Hhlds: 919
Hhld %: 16.52
% in Benchmark: 3.77
Index: 438

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: 5
Hhlds: 345
Hhld %: 6.21
% in Benchmark: 1.81
Index: 343

Found in mostly small- and medium-size cities, Juggling Acts features a mix of younger singles and young families, with higher-than-average rates for divorced and separated individuals as well as lone-parent families. In their established neighbourhoods, nearly half the householders are renters, typically living in semis, rows, duplexes and low-rise apartments. Thanks to a high percentage of maintainers under the age of 35, a youthful energy pervades this lifestyle. Despite modest educational achievement—a mix of grade 9, high school and college graduates—the adults have decent-paying service sector and blue-collar jobs. But this is a transient group—half the residents have moved in the past five years—and they're always on the lookout for better opportunities. Many rely on their cars for commuting to work and pursuing leisure activities in the city and countryside. In Juggling Acts, residents have high rates for enjoying billiards, martial arts, camping and fishing and hunting. Their idea of a weekend splurge is going to a sporting event, community theatre, craft show or music festival. Members of this group regularly seek ways to save money, and they would not pay more for brand name products (Brand Apathy).

Psychographics | SocialValues Overview

Trade Area: Sarnia - Downtown Sarnia



Strong Values

Values	Index
Financial Concern Regarding the Future	143
Ethical Consumerism	131
Aversion to Complexity	128
Obedience to Authority	122
Confidence in Small Business	120
Flexible Families	120
Utilitarian Consumerism	120
Fear of Violence	118
Primacy of Environmental Protection	118
Rejection of Inequality	117



Descriptions | Top 3 Strong Values

Financial Concern Regarding the Future

The feeling of insecurity about one's financial future, particularly in old age, and of being personally responsible in this area.

Ethical Consumerism

Willingness to base consumer decisions on the perceived ethics of the company making the product (e.g., whether management treats employees fairly, co-operates with governments that do not meet ethical standards, or uses testing methods that involve mistreatment of animals). Desire to see companies be good corporate citizens in terms of these new social concerns.

Aversion to Complexity

Tendency to find it difficult to adapt to the uncertainties of modern life, and to feel threatened by the changes and complexities of society today. A desire to avoid this complexity as a learning experience and a source of opportunity.



Weak Values

Values	Index
Ostentatious Consumption	71
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Need for Status Recognition	77
Enthusiasm for Technology	78
Adaptability to Complexity	79
Effort Toward Health	79
Financial Security	80
Traditional Family	81
Interest in the Unexplained	82



Descriptions | Top 3 Weak Values

Ostentatious Consumption

Desire to impress others and express one's social standing through the display of objects that symbolize affluence.

Vitality

The sense that one has a great deal of energy and is in contact with this energy. It measures an energetic, lively approach to life, a feeling that one has more vigor and initiative than most other people.

Status via Home

Feeling a strong sense that one's home represents an extension of one's image. People strongest on this construct make great efforts to decorate and equip their homes in a manner that will impress others, and pay particular attention to the way they entertain in the home.

Benchmark: Ontario

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Index Colours:	<80	80 - 110	110+
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Financial and Expenditure Overview

Financial | WealthScapes Overview

ENVIRONICS
ANALYTICS

Trade Area: Sarnia - Downtown Sarnia

WealthScapes Households: 5,564

INCOME*

Household Income

\$ 66,201

Index: **57**

Household Disposable Income

\$ 55,272

Index: **60**

Household Discretionary Income

\$ 38,636

Index: **60**

Annual RRSP Contributions

\$ 1,062

Index: **30**

WEALTH*



Net Worth

% Holders

99.3% Index: **100**

Balance

\$275,849

Index: **37**

ASSETS*



Savings

% Holders

94.1% Index: **99**

Balance

\$45,183

Index: **59**



Investments

% Holders

48.3% Index: **80**

Balance

\$207,787

Index: **62**



Unlisted Shares

% Holders

9.9% Index: **80**

Balance

\$167,199

Index: **53**



Real Estate

% Holders

44.9% Index: **59**

Balance

\$321,352

Index: **43**



Liquid Assets

% Holders

96.8% Index: **99**

Balance

\$174,632

Index: **53**

DEBT*



Consumer Debt

% Holders

87.5% Index: **96**

Balance

\$27,400

Index: **41**



Mortgage Debt

% Holders

25.7% Index: **55**

Balance

\$124,599

Index: **42**

FINANCIAL RATIO



Debt:Asset

% Holders

0.17% Index: **80**

Benchmark: Southern Ontario

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% Holders represent where customers are found.

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

Index Colours: <80 80 - 110 110+

Trade Area: Sarnia - Downtown Sarnia

WealthScapes Households: 5,564

FINANCIAL RATIOS*



Debt: Asset

0.17

Index: 80



Debt: Liquid Assets

0.33

Index: 54



Consumer Debt - Discr. Income

0.62

Index: 66



Savings - Investments

0.69

Index: 114



Pension - Non-Pension Assets

0.53

Index: 244



Real Estate Assets - Liq. Assets

0.85

Index: 49



Mortgage - Real Estate Assets

0.22

Index: 91



Mortgage - Consumer Debt

1.34

Index: 58

Benchmark: Southern Ontario

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Index Colours: <80 80 - 110 110+

Expenditures | HouseholdSpend - Annual Expenditure Overview

ENVIRONICS
ANALYTICS

Trade Area: Samia - Downtown Samia

Households: 5,564

Total Aggregate Current Consumption: \$250,520,213

Average Current Consumption

\$45,025

Index 55

Average Household Income

\$65,508

Index 57

Average Disposable Income

\$54,298

Index 60



Shelter

Avg. Dollars/Household

\$12,505

Index 59

Pct. of Total Expenditure

27.8%

Index 108



Food

Avg. Dollars/Household

\$7,887

Index 62

Pct. of Total Expenditure

17.5%

Index 112



Transportation

Avg. Dollars/Household

\$6,476

Index 47

Pct. of Total Expenditure

14.4%

Index 85



Household Operation

Avg. Dollars/Household

\$3,117

Index 54

Pct. of Total Expenditure

6.9%

Index 99



Health Care

Avg. Dollars/Household

\$2,813

Index 51

Pct. of Total Expenditure

6.2%

Index 93



Tobacco and Alcohol

Avg. Dollars/Household

\$2,652

Index 75

Pct. of Total Expenditure

5.9%

Index 135



Recreation

Avg. Dollars/Household

\$1,891

Index 40

Pct. of Total Expenditure

4.2%

Index 72



Clothing

Avg. Dollars/Household

\$1,830

Index 55

Pct. of Total Expenditure

4.1%

Index 100



Household Furnishings

Avg. Dollars/Household

\$1,696

Index 43

Pct. of Total Expenditure

3.8%

Index 77

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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









ENVIRONICS
ANALYTICS

Trade Area: Samia - Downtown Samia

Households: 5,564

Average Household Income	Average Food Expenditure	Average Spend on Food from Restaurants	Average Spend on Food from Stores
\$65,508	\$7,887	\$2,824	\$5,063
Index 57	Index 62	Index 70	Index 58

Total Aggregate Food Expenditure: \$ 43,883,446

 Bakery Avg. Dollars/Household \$551 Index 63 Pct. of Total Expenditure 10.9% Index 109	 Cereal Products Avg. Dollars/Household \$289 Index 57 Pct. of Total Expenditure 5.7% Index 98	 Fruit and nuts Avg. Dollars/Household \$555 Index 51 Pct. of Total Expenditure 11.0% Index 88
 Vegetables Avg. Dollars/Household \$503 Index 54 Pct. of Total Expenditure 9.9% Index 94	 Dairy products & Eggs Avg. Dollars/Household \$670 Index 52 Pct. of Total Expenditure 13.2% Index 91	 Meat Avg. Dollars/Household \$917 Index 58 Pct. of Total Expenditure 18.1% Index 101
 Fish & Seafood Avg. Dollars/Household \$134 Index 46 Pct. of Total Expenditure 2.7% Index 79	 Beverages & Other Food Avg. Dollars/Household \$1,444 Index 65 Pct. of Total Expenditure 28.5% Index 113	

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+
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Post COVID-19 Activities

Trade Area: Sarnia - Downtown Sarnia

Household Population 14+: 8,859

Activities Look Forward To Doing

	%	Base %	Index
Socializing			
Dating	13.2	11.0	120
Going to restaurants, bars or night clubs	53.2	55.1	97
Having physical Contact with family and friends	58.6	57.7	101
Participating in group activities	35.5	38.7	92
Partying	14.1	15.8	89
Seeing family and friends in person	65.5	62.8	104
Entertainment			
Attending events, festivals or concerts	39.3	42.9	92
Attending sports events (excludes professional sports)	17.5	18.2	96
Attending to professional sports events or games	23.8	25.4	94
Going to the movies	42.7	45.7	93
Movement & Travel			
Driving more	15.3	16.1	95
Shopping in-store	40.3	42.9	94
Spending time outdoors	31.7	32.5	98
Travelling outside of Canada/ abroad	44.0	53.2	83
Travelling within Canada	47.8	49.9	96
Using public transit	8.7	13.7	63
Personal			
Getting back to old habits	35.6	36.2	98
Going to a salon, barber shop or spa	31.7	33.7	94
Going to the gym	15.3	22.6	68
Education/Work			
Children going back to school	17.4	20.3	86
Going back to work	15.7	17.6	89
Other			
Not Stated	0.2	0.6	32

Benchmark: Southern Ontario

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(Base used for Index calculations)

Index Colours:	<80	80 - 110	110+
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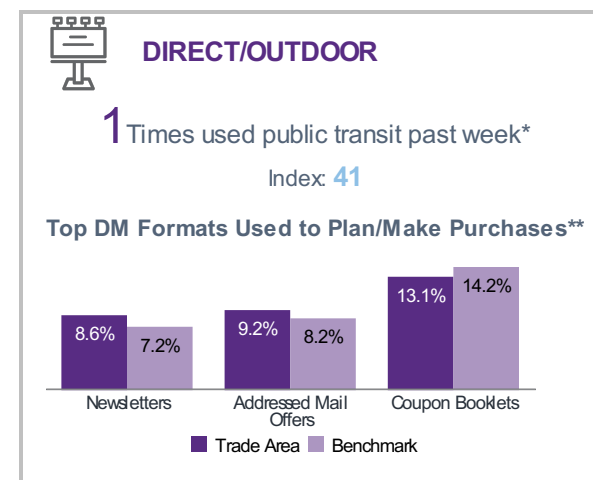
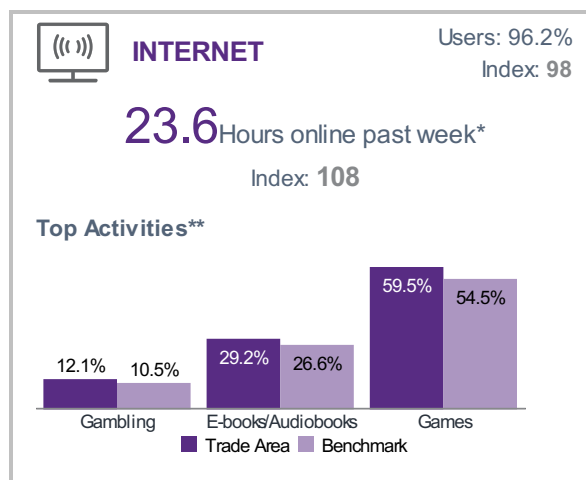
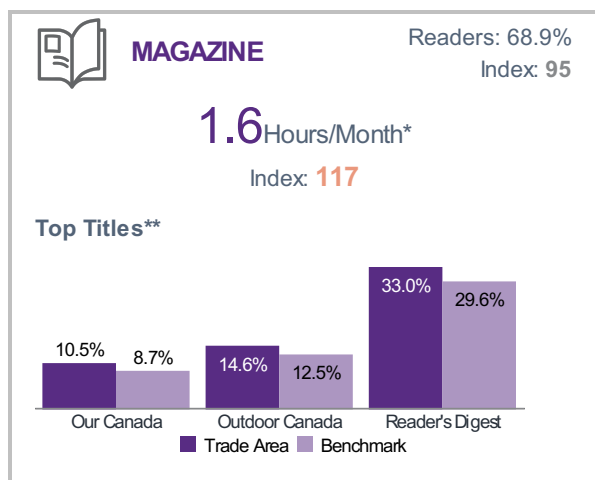
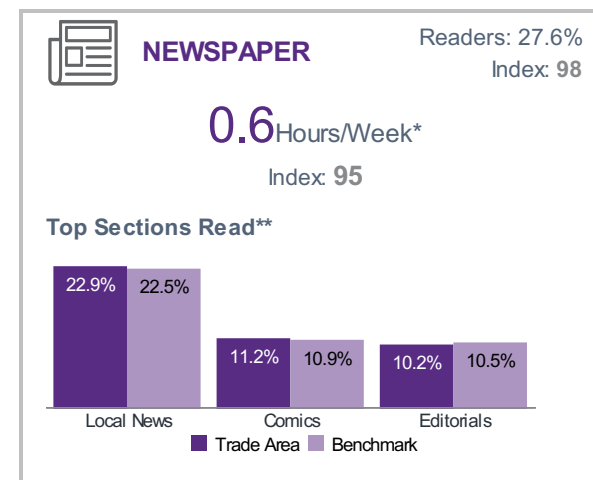
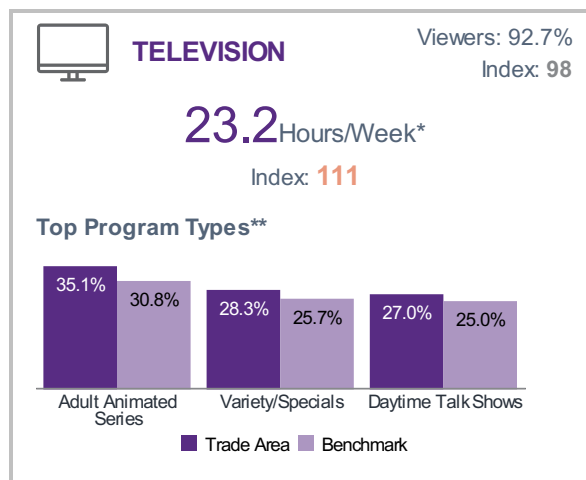
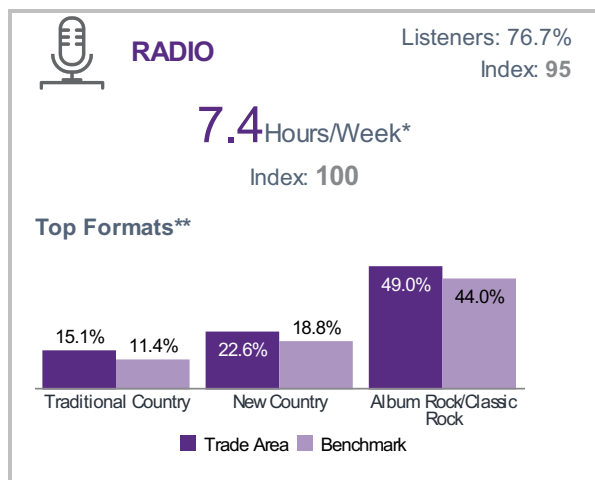
Media and Social Media Overview

Behavioural | Media Overview

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Trade Area: Sarnia - Downtown Sarnia

Household Population 14+: 8,859



Benchmark: Southern Ontario

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* Consumption values based to variable's incidence count.

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

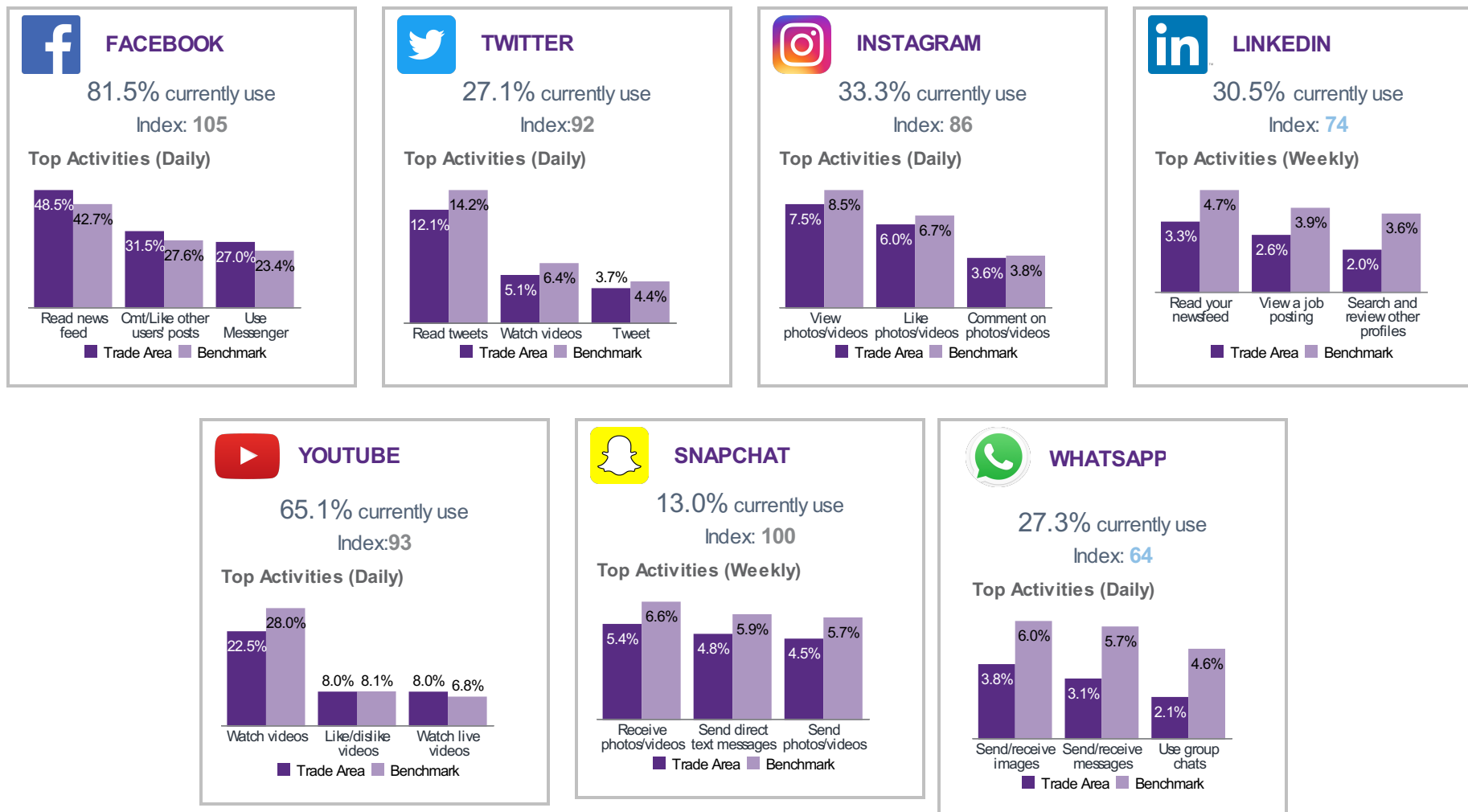
Index Colours: <80 80 - 110 110+

Opticks Social | Social Media Activities

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Trade Area: Sarnia - Downtown Sarnia

Household Population 18+: 8,553



Benchmark: Southern Ontario

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(<https://en.environicsanalytics.ca/Envision/About/1/2021>)

Chosen and ranked by percent composition

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

Index Colours:	<80	80 - 110	110+
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Opticks Social | Social Media Usage

ENVIRONICS
ANALYTICS

Trade Area: Sarnia - Downtown Sarnia

Household Population 18+: 8,553

FRIENDS IN ALL SM NETWORKS



41.4%

Index: 117

0-49 friends

FREQUENCY OF USE (DAILY)



62.1%

Index: 111

Facebook

BRAND INTERACTION



35.2%

Index: 102

Like brand on Facebook

NO. OF BRANDS INTERACTED

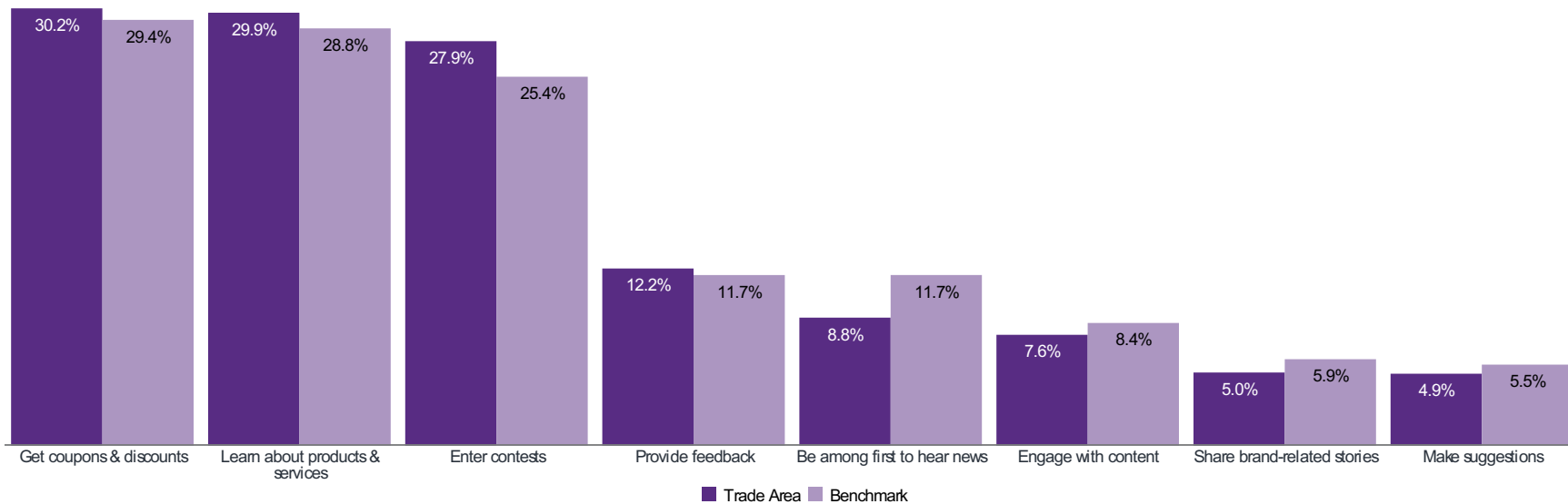


30.6%

Index: 100

2-5 brands

REASONS TO FOLLOW BRANDS USING SOCIAL MEDIA



Benchmark: Southern Ontario

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(<https://en.environicsanalytics.ca/Envision/About/1/2021>)

Chosen and ranked by percent composition

Index Colours:	<80	80 - 110	110+
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Online Shopping Attitudes and Behaviours

Opticks eShopper | Online Shopping Attitudes

ENVIRONICS
ANALYTICS

Trade Area: Sarnia - Downtown Sarnia

Total Household Population 18+:8,553



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

% Comp 91.5 Index 104



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

% Comp 46.1 Index 95



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

% Comp 85.6 Index 102



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

% Comp 37.2 Index 90



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

% Comp 54.7 Index 96



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

% Comp 28.6 Index 95

Benchmark: Southern Ontario

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Ranked by percent composition.

Index Colours:	<80	80 - 110	110+
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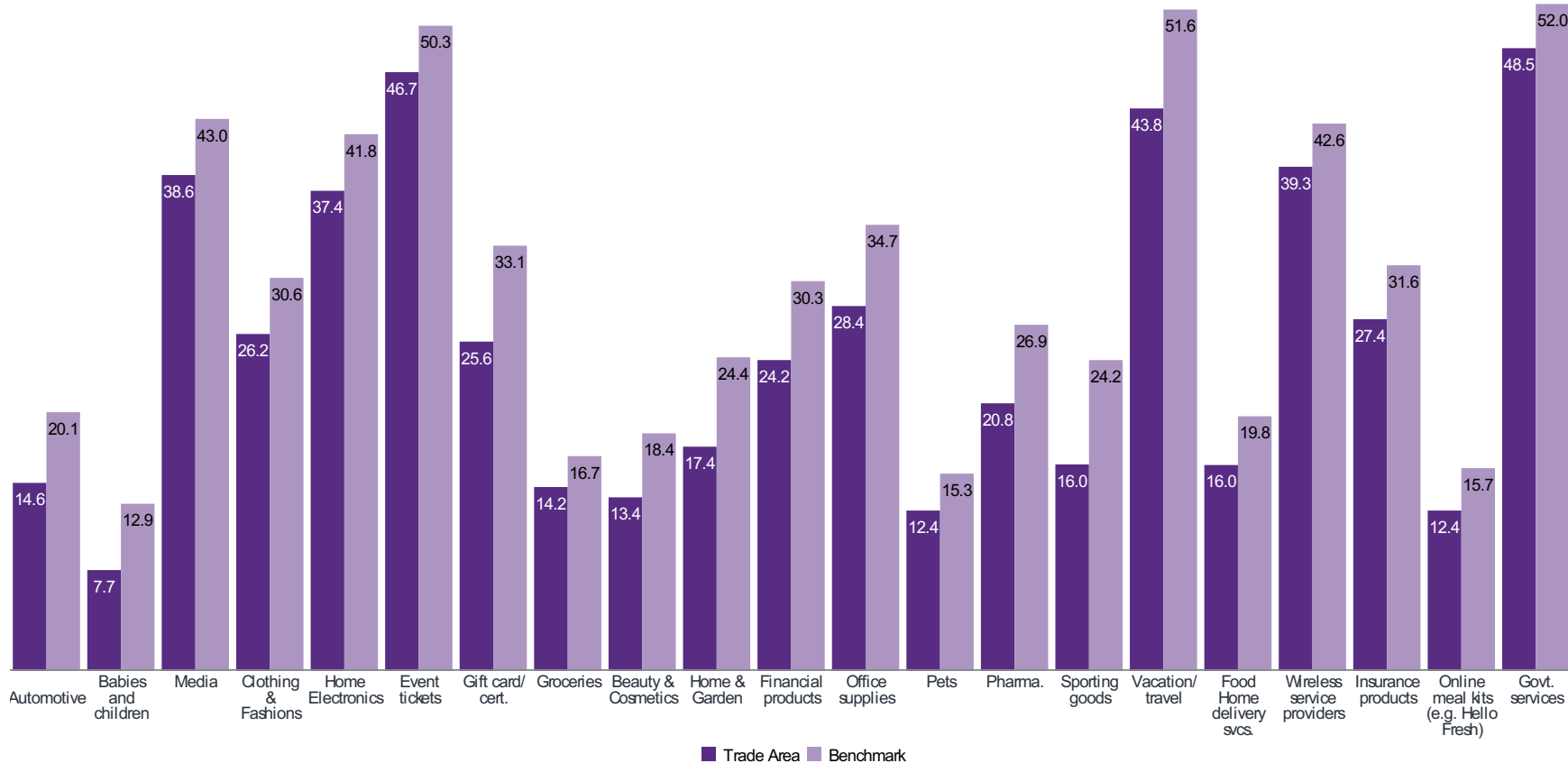
Opticks eShopper | Purchase Preference by Category

ENVIRONICS
ANALYTICS

Trade Area: Sarnia - Downtown Sarnia

Total Household Population 18+:8,553

ONLINE PURCHASE PREFERENCE BY CATEGORY - VIA COMPUTER (%)



Benchmark: Southern Ontario

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Index Colours:	<80	80 - 110	110+
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Opticks eShopper | Clothing & Fashions Deep Dive

ENVIRONICS
ANALYTICS

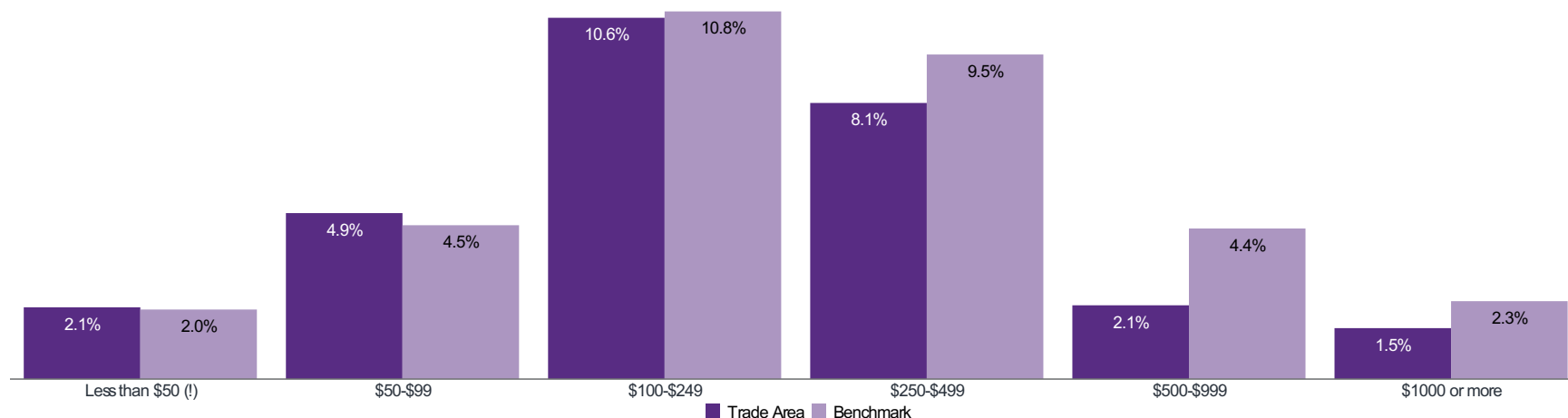
Trade Area: Sarnia - Downtown Sarnia

Total Household Population 18+: 8,553

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	65.8% Index:107	30.2% Index:82	11.3% Index:92	1.5% Index:48
Purchase preference	80.0% Index:106	26.2% Index:86	9.0% Index:91	2.3% Index:89
Customer Service	68.8% Index:111	15.1% Index:84	4.4% Index:76	18.6% Index:86

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 | Home Electronics & Computers Deep Dive

ENVIRONICS
ANALYTICS

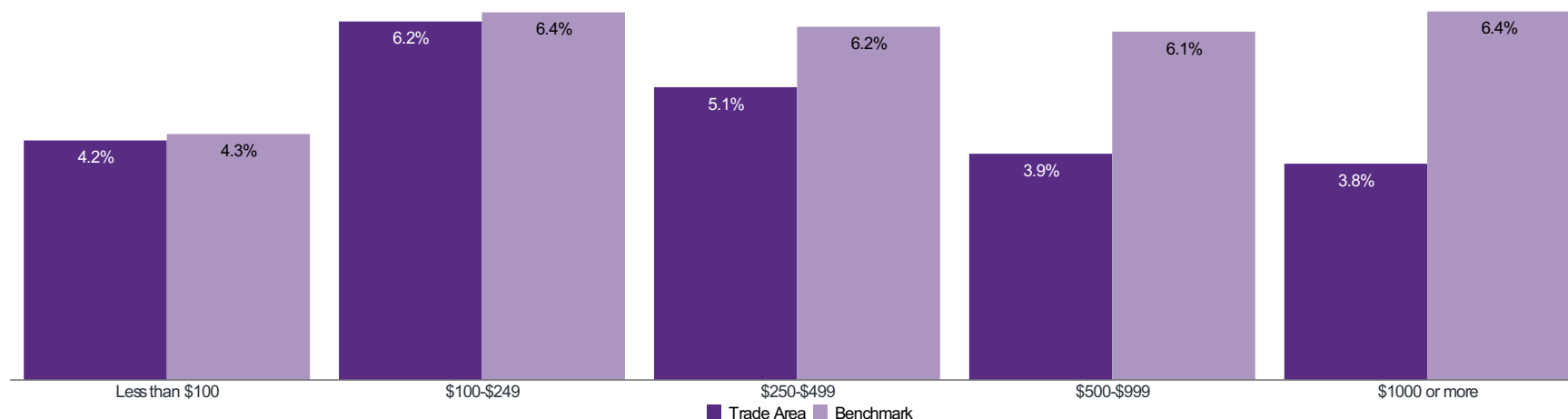
Trade Area: Sarnia - Downtown Sarnia

Total Household Population 18+: 8,553

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	55.0% Index: 109	49.2% Index: 90	13.1% Index: 84	8.6% Index: 105
Purchase preference	72.4% Index: 106	37.4% Index: 89	9.9% Index: 90	6.5% Index: 101
Customer Service	61.0% Index: 108	23.5% Index: 94	7.3% Index: 99	36.4% Index: 99

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

ENVIRONICS
ANALYTICS

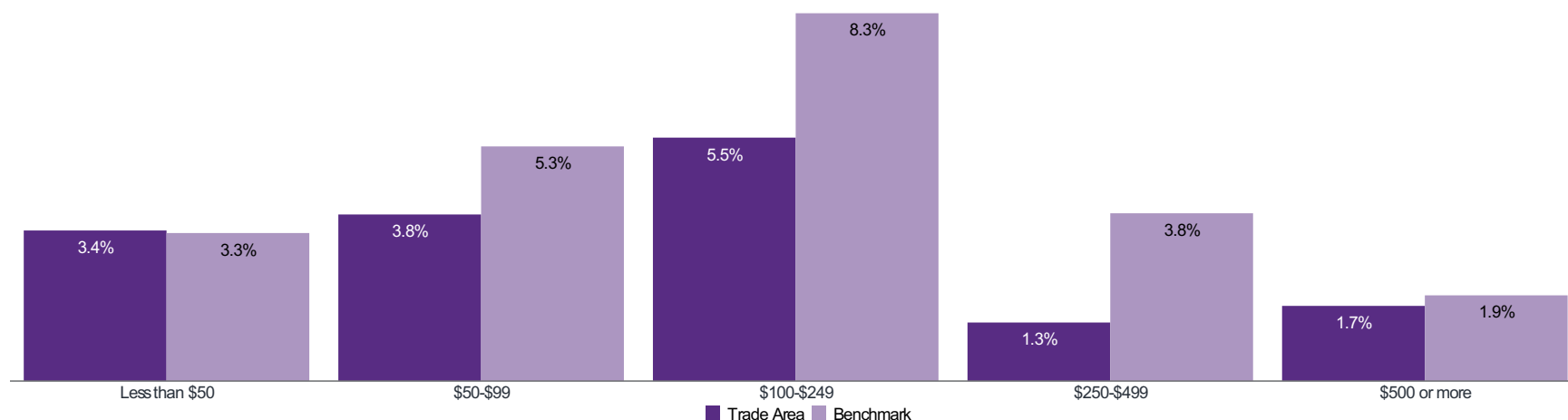
Trade Area: Sarnia - Downtown Sarnia

Total Household Population 18+: 8,553

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	56.5% Index: 118	27.1% Index: 77	8.0% Index: 72	2.9% Index: 81
Purchase preference	68.1% Index: 113	25.6% Index: 77	6.5% Index: 74	3.6% Index: 117
Customer Service	50.9% Index: 120	17.9% Index: 87	5.2% Index: 85	25.6% Index: 92

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

ENVIRONICS
ANALYTICS

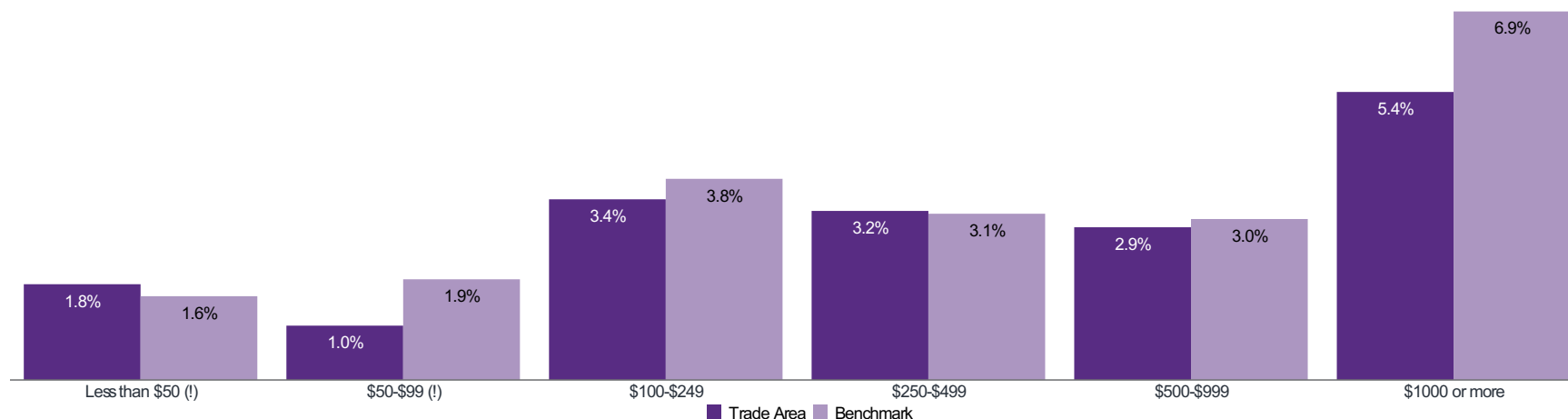
Trade Area: Sarnia - Downtown Sarnia

Total Household Population 18+: 8,553

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	74.2% Index:103	22.8% Index:92	10.2% Index:92	2.7% Index:98
Purchase preference	85.5% Index:102	14.2% Index:85	5.3% Index:84	2.3% Index:92
Customer Service	75.9% Index:109	8.3% Index:72	2.9% Index:74	17.4% Index:93

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 | Beauty & Cosmetics Deep Dive

ENVIRONICS
ANALYTICS

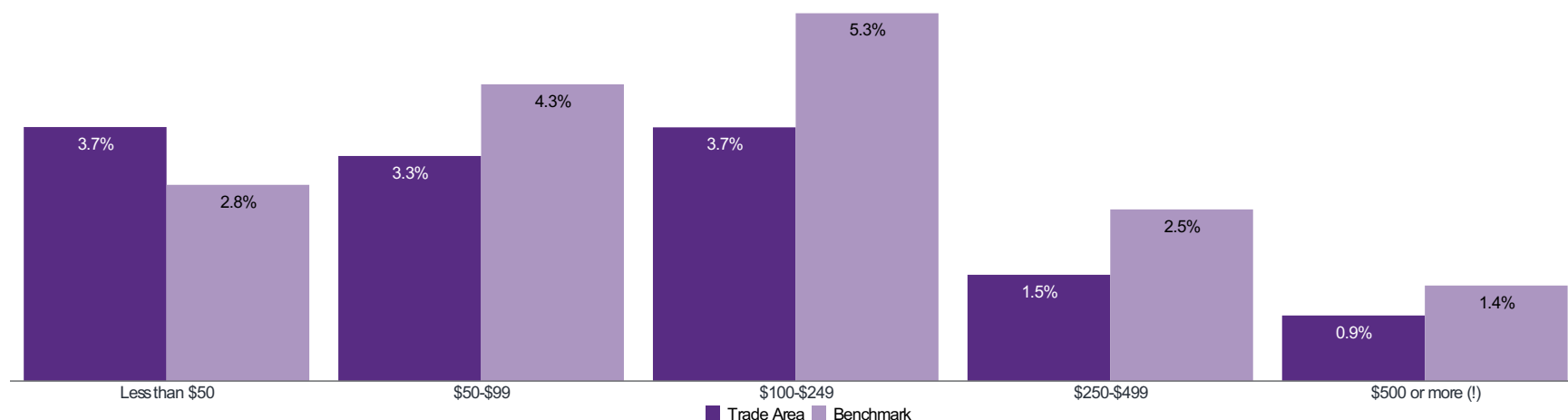
Trade Area: Sarnia - Downtown Sarnia

Total Household Population 18+: 8,553

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	38.2% Index:108	18.9% Index:85	6.9% Index:85	1.8% Index:65
Purchase preference	49.0% Index:106	13.4% Index:73	4.7% Index:74	1.9% Index:84
Customer Service	41.5% Index:114	9.3% Index:74	2.6% Index:61	12.2% Index:83

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

ENVIRONICS
ANALYTICS

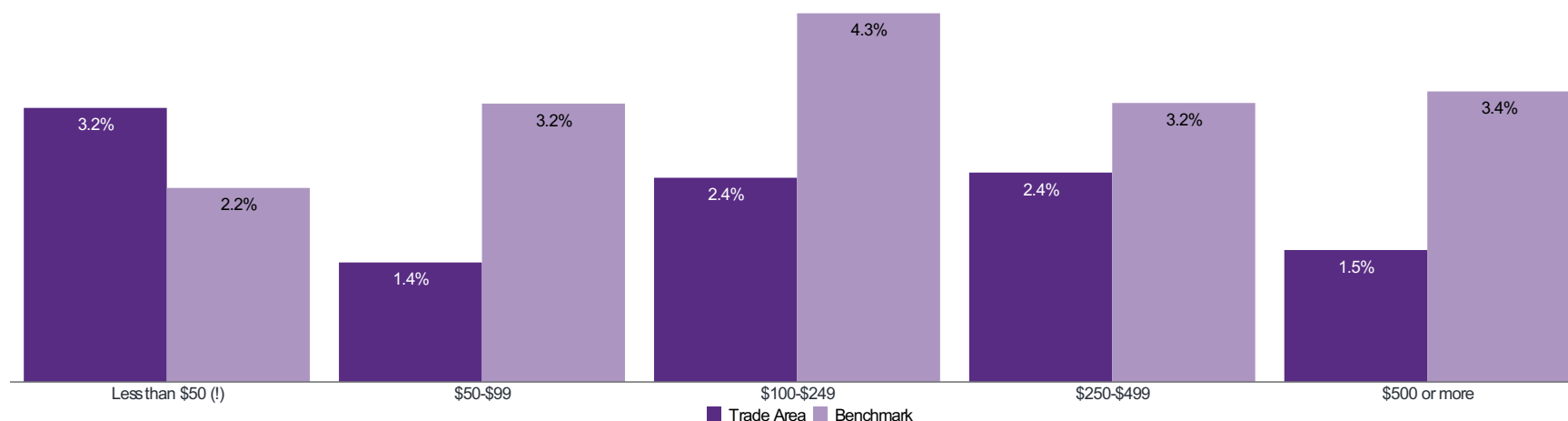
Trade Area: Sarnia - Downtown Sarnia

Total Household Population 18+: 8,553

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	47.8% Index:92	33.3% Index:88	8.0% Index:70	5.0% Index:86
Purchase preference	61.6% Index:90	17.4% Index:71	5.1% Index:72	2.3% Index:64
Customer Service	52.4% Index:97	12.4% Index:77	3.3% Index:69	17.8% Index:78

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

ENVIRONICS
ANALYTICS

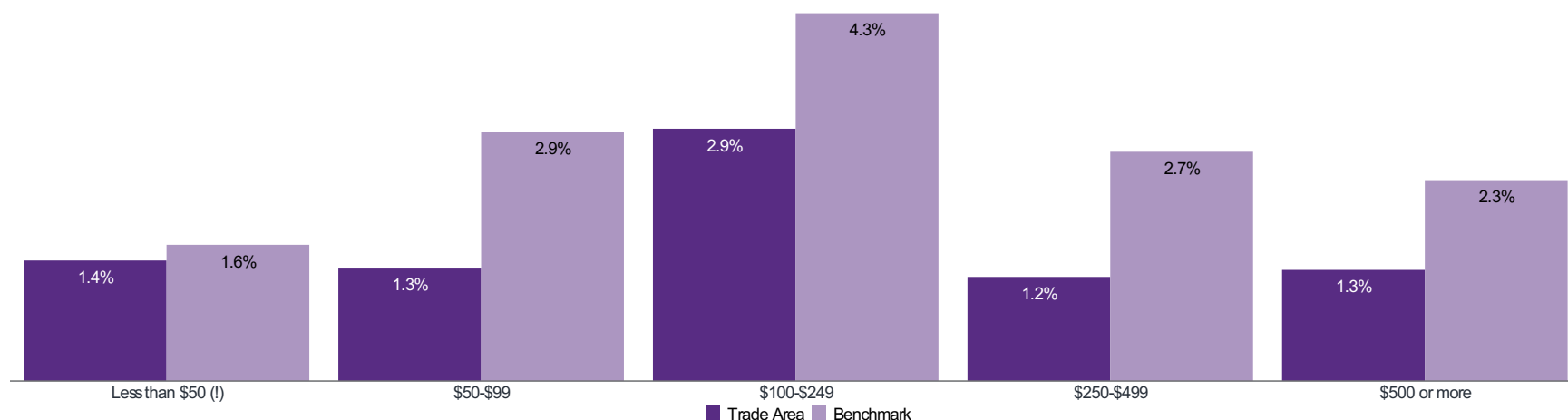
Trade Area: Sarnia - Downtown Sarnia

Total Household Population 18+: 8,553

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:94	24.3% Index:76	7.2% Index:68	3.8% Index:96
Purchase preference	47.9% Index:92	16.0% Index:66	6.2% Index:82	2.6% Index:87
Customer Service	39.8% Index:95	10.8% Index:71	3.5% Index:68	16.3% Index:80

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

ENVIRONICS
ANALYTICS

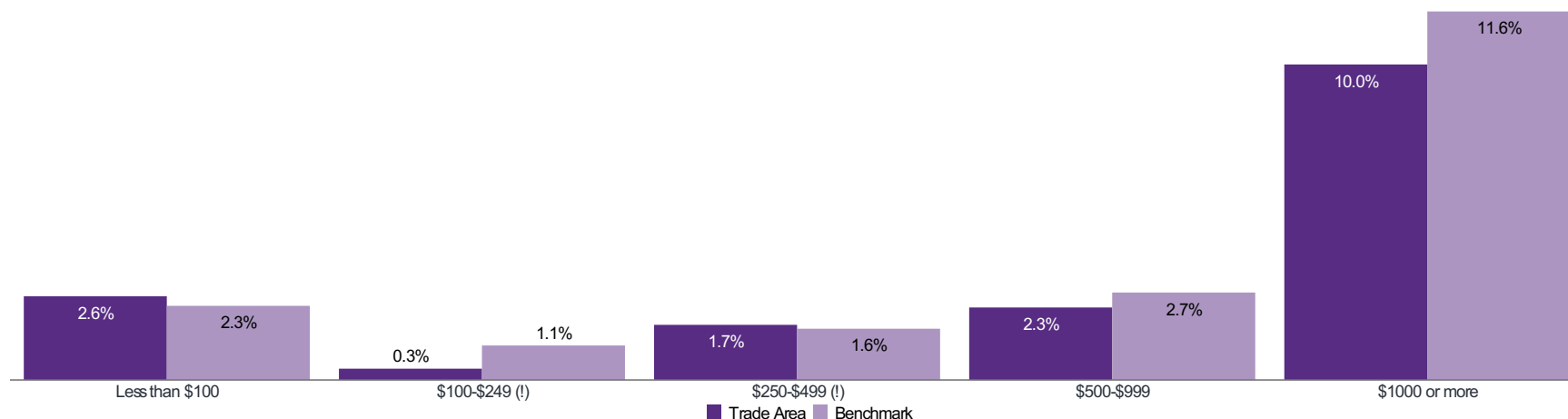
Trade Area: Sarnia - Downtown Sarnia

Total Household Population 18+: 8,553

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	23.5% Index: 115	51.0% Index: 88	11.6% Index: 77	16.6% Index: 103
Purchase preference	33.0% Index: 115	43.8% Index: 85	5.1% Index: 75	15.8% Index: 88
Customer Service	35.7% Index: 123	23.6% Index: 86	4.1% Index: 59	40.1% Index: 91

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

ENVIRONICS
ANALYTICS

Trade Area: Sarnia - Downtown Sarnia

Households: 5,564

STORE LOYALTY INFLUENCES - HIGHLY INFLUENTIAL ASSORTMENT / PRODUCT QUALITY



Benchmark: Southern Ontario

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

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Index Colours:	<80	80 - 110	110+
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ShopperChoice | Store Loyalty - Shopping Experience

ENVIRONICS
ANALYTICS

Trade Area: Sarnia - Downtown Sarnia

Households: 5,564

STORE LOYALTY INFLUENCES - HIGHLY INFLUENTIAL CONVENIENCE / SHOPPING EXPERIENCE

Convenient location for me



56.6%

Index: 95

Organized layout makes it easy to shop



44.2%

Index: 106

Easy to get in and get out quickly



40.1%

Index: 93

Staff are friendly and knowledgeable



39.6%

Index: 117

Short checkout lines/fast checkout



32.8%

Index: 92

Has extended hours



25.5%

Index: 93

I like the store ambiance



21.3%

Index: 107

Has self-checkout



11.7%

Index: 85

Offers an online shopping option (!)



6.2%

Index: 70

Benchmark: Southern Ontario

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

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(<https://en.environicsanalytics.ca/Envision/About/1/2021>)

Index Colours:	<80	80 - 110	110+
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ShopperChoice | Store Loyalty - Price and Promo

ENVIRONICS
ANALYTICS

Trade Area: Sarnia - Downtown Sarnia

Households: 5,564

STORE LOYALTY INFLUENCES - HIGHLY INFLUENTIAL PRICE AND PROMO

Store has great sales and promotions



64.4%

Index: 95

Discover good value when shopping



61.9%

Index: 94

Store has the lowest prices overall



59.3%

Index: 102

Store has a customer loyalty card program



49.2%

Index: 99

Has loyalty prog. app and offers pers. promos



29.2%

Index: 100

I'm loyal to their store brands



26.1%

Index: 114

OUT OF STOCK ITEM

	% Base	% Pen	Index
Psychographics - Shopping Preferences			
Postpone the purchase	43.9	40.2	0.1 109
Leave the store and buy it elsewhere	25.6	30.9	0.1 83
Purchase another brand	20.6	21.2	0.1 97
Purchase another size or variety of the same brand (!)	10.0	7.7	0.2 129

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+
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Main Street Visitors

2019 Sarnia - Downtown Sarnia 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%	104,111	100%	0.54%	100	109,985	100%	0.57%	100	83,698	100%	0.43%	100	90,570	100%	0.47%	100	149,887	100%	0.78%	100
3538030	Sarnia, ON (CY)	62,178	0.32%	43,064	41.36%	69.26%	12841	42,161	38.33%	67.81%	11900	37,921	45.31%	60.99%	14065	39,787	43.93%	63.99%	13638	47,297	31.55%	76.07%	9796
3536020	Chatham-Kent, ON (MU)	86,702	0.45%	7,280	6.99%	8.40%	1557	8,259	7.51%	9.53%	1672	5,491	6.56%	6.33%	1461	6,062	6.69%	6.99%	1490	12,885	8.60%	14.86%	1914
3539036	London, ON (CY)	349,526	1.81%	6,632	6.37%	1.90%	352	7,468	6.79%	2.14%	375	4,776	5.71%	1.37%	315	5,075	5.60%	1.45%	309	12,352	8.24%	3.53%	455
3538003	St. Clair, ON (TP)	12,532	0.06%	8,157	7.84%	65.09%	12068	8,274	7.52%	66.02%	11587	6,590	7.87%	52.59%	12128	7,770	8.58%	62.00%	13214	9,334	6.23%	74.48%	9592
3538035	Plympton-Wyoming, ON (T)	7,076	0.04%	4,617	4.43%	65.24%	12097	4,502	4.09%	63.62%	11166	3,382	4.04%	47.80%	11023	4,405	4.86%	62.25%	13266	5,198	3.47%	73.46%	9461
3520005	Toronto, ON (C)	2,568,898	13.31%	2,667	2.56%	0.10%	19	2,490	2.26%	0.10%	17	1,594	1.90%	0.06%	14	1,098	1.21%	0.04%	9	4,833	3.22%	0.19%	24
3538019	Petrolia, ON (T)	4,835	0.03%	2,895	2.78%	59.87%	11100	2,948	2.68%	60.97%	10700	2,363	2.82%	48.86%	11269	2,272	2.51%	47.00%	10017	3,364	2.24%	69.58%	8961
3537039	Windsor, ON (CY)	191,749	0.99%	1,340	1.29%	0.70%	130	2,010	1.83%	1.05%	184	747	0.89%	0.39%	90	1,165	1.29%	0.61%	129	3,138	2.09%	1.64%	211
3538040	Lambton Shores, ON (MU)	9,615	0.05%	2,080	2.00%	21.63%	4011	1,771	1.61%	18.42%	3233	1,306	1.56%	13.58%	3132	1,733	1.91%	18.02%	3841	2,833	1.89%	29.47%	3795
3525005	Hamilton, ON (C)	483,265	2.50%	1,007	0.97%	0.21%	39	1,390	1.26%	0.29%	50	840	1.00%	0.17%	40	593	0.65%	0.12%	26	2,411	1.61%	0.50%	64

Index Legend	Under 80	110 to 119	120 to 149	Over 150
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2019 Sarnia - Downtown Sarnia 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
8,779	5,733	65.3	6,236	71.0	5,654	64.4	5,365	61.1	6,556	74.7

2019 Sarnia - Downtown Sarnia 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	154,589	6,556	4.2	148,033	95.8

2020 Sarnia - Downtown Sarnia 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%	62,197	100%	0.32%	100	78,991	100%	0.41%	100	73,370	100%	0.38%	100	74,609	100%	0.39%	100	114,567	100%	0.59%	100
3538030	Sarnia, ON (CY)	62,178	0.32%	32,863	52.84%	52.85%	16403	34,308	43.43%	55.18%	13484	34,484	47.00%	55.46%	14591	36,064	48.34%	58.00%	15006	43,116	37.63%	69.34%	11683
3536020	Chatham-Kent, ON (MU)	86,702	0.45%	3,264	5.25%	3.76%	1168	4,947	6.26%	5.71%	1394	4,827	6.58%	5.57%	1465	4,361	5.85%	5.03%	1301	9,182	8.01%	10.59%	1784
3538003	St. Clair, ON (TP)	12,532	0.06%	6,285	10.11%	50.16%	15565	6,942	8.79%	55.40%	13537	7,320	9.98%	58.41%	15367	7,605	10.19%	60.68%	15700	8,932	7.80%	71.27%	12009
3539036	London, ON (CY)	349,526	1.81%	2,963	4.76%	0.85%	263	4,606	5.83%	1.32%	322	4,197	5.72%	1.20%	316	3,140	4.21%	0.90%	232	8,480	7.40%	2.43%	409
3538035	Plympton-Wyoming, ON (T)	7,076	0.04%	3,229	5.19%	45.63%	14163	4,571	5.79%	64.59%	15784	4,435	6.04%	62.67%	16488	4,146	5.56%	58.60%	15160	5,629	4.91%	79.56%	13404
3538040	Lambton Shores, ON (MU)	9,615	0.05%	1,062	1.71%	11.04%	3427	1,485	1.88%	15.45%	3774	1,594	2.17%	16.57%	4360	1,325	1.78%	13.78%	3564	2,366	2.07%	24.61%	4146
3520005	Toronto, ON (C)	2,568,898	13.31%	334	0.54%	0.01%	4	1,647	2.09%	0.06%	16	766	1.04%	0.03%	8	799	1.07%	0.03%	8	2,293	2.00%	0.09%	15
3538019	Petrolia, ON (T)	4,835	0.03%	1,218	1.96%	25.20%	7819	1,529	1.94%	31.61%	7725	1,489	2.03%	30.79%	8100	1,498	2.01%	30.98%	8015	2,179	1.90%	45.07%	7593
3537039	Windsor, ON (CY)	191,749	0.99%	696	1.12%	0.36%	113	1,208	1.53%	0.63%	154	788	1.07%	0.41%	108	570	0.76%	0.30%	77	2,045	1.78%	1.07%	180
3525005	Hamilton, ON (C)	483,265	2.50%	466	0.75%	0.10%	30	764	0.97%	0.16%	39	598	0.82%	0.12%	33	485	0.65%	0.10%	26	1,477	1.29%	0.31%	51

Index Legend	Under 80	110 to 119	120 to 149	Over 150
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2020 Sarnia - Downtown Sarnia 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
8,779	5,885	67.0	5,636	64.2	5,420	61.7	5,763	65.6	6,786	77.3

2020 Sarnia - Downtown Sarnia 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	116,621	6,786	5.8	109,836	94.2

2021 Sarnia - Downtown Sarnia 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%	56,499	100%	0.29%	100	100,322	100%	0.52%	100	83,739	100%	0.43%	100	64,207	100%	0.33%	100	119,440	100%	0.62%	100
3538030	Sarnia, ON (CY)	62,178	0.32%	26,670	47.20%	42.89%	14654	35,958	35.84%	57.83%	11127	36,715	43.85%	59.05%	13611	30,174	47.00%	48.53%	14589	39,250	32.86%	63.12%	10202
3538003	St. Clair, ON (TP)	12,532	0.06%	6,451	11.42%	51.47%	17585	9,471	9.44%	75.57%	14541	9,172	10.95%	73.19%	16871	7,992	12.45%	63.77%	19172	9,991	8.36%	79.72%	12884
3536020	Chatham-Kent, ON (MU)	86,702	0.45%	3,316	5.87%	3.82%	1307	7,123	7.10%	8.22%	1581	5,992	7.16%	6.91%	1593	3,101	4.83%	3.58%	1075	9,717	8.14%	11.21%	1811
3539036	London, ON (CY)	349,526	1.81%	2,308	4.09%	0.66%	226	5,701	5.68%	1.63%	314	4,920	5.88%	1.41%	324	3,596	5.60%	1.03%	309	9,580	8.02%	2.74%	443
3538035	Plympton-Wyoming, ON (T)	7,076	0.04%	3,201	5.67%	45.24%	15456	5,194	5.18%	73.40%	14123	4,593	5.49%	64.92%	14964	4,535	7.06%	64.09%	19267	5,207	4.36%	73.59%	11892
3520005	Toronto, ON (C)	2,568,898	13.31%	1,019	1.80%	0.04%	14	4,840	4.82%	0.19%	36	1,411	1.69%	0.05%	13	167	0.26%	0.01%	2	4,755	3.98%	0.19%	30
3538040	Lambton Shores, ON (MU)	9,615	0.05%	1,019	1.80%	10.60%	3621	2,515	2.51%	26.16%	5033	2,402	2.87%	24.98%	5758	1,433	2.23%	14.91%	4482	2,548	2.13%	26.50%	4282
3537039	Windsor, ON (CY)	191,749	0.99%	741	1.31%	0.39%	132	1,902	1.90%	0.99%	191	954	1.14%	0.50%	115	512	0.80%	0.27%	80	2,338	1.96%	1.22%	197
3538019	Petrolia, ON (T)	4,835	0.03%	1,237	2.19%	25.59%	8742	1,555	1.55%	32.17%	6189	1,521	1.82%	31.46%	7252	1,248	1.94%	25.81%	7759	2,171	1.82%	44.89%	7255
3539015	Strathroy-Caradoc, ON (MU)	19,358	0.10%	577	1.02%	2.98%	1018	1,657	1.65%	8.56%	1647	842	1.01%	4.35%	1003	819	1.28%	4.23%	1272	2,068	1.73%	10.68%	1726

Index Legend	Under 80	110 to 119	120 to 149	Over 150
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2021 Sarnia - Downtown Sarnia 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
8,779	4,675	53.3	5,854	66.7	6,086	69.3	5,063	57.7	6,429	73.2

2021 Sarnia - Downtown Sarnia 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	121,692	6,429	5.3	115,263	94.7

Top 5 segments represent **40.2%** of customers in Southern Ontario



Rank: 1
Customers: 11,663
Customers %: 10.80
% in Benchmark: 2.74
Index: 394

Found mostly in Alberta and Ontario, New Country is one of the wealthiest rural segments, with nearly two-thirds of residents working in well-paying jobs in agriculture, mining, natural industries and other blue-collar occupations. Scoring high for self-employment, a significant percentage of residents work as farmers and independent contractors in related industries. Their six-figure incomes provide comfortable, single-detached houses and enviable lifestyles. Forty percent of the maintainers are between 45 and 64 years old, and nearly 45 percent of households have children, typically of all ages. Like generations of rural households before them, New Country members are known for their deep roots in the community. Three-quarters of residents are third-plus-generation Canadians; fewer than one in ten are foreign-born. In these rural settings, people get attached to their pickups and drive them for decades. For leisure, they like to go hunting, fishing and boating, or they'll stay home and do some gardening. With their traditional views on politics and religion, they support family values and oppose government involvement in people's private lives; they score very low on Active Government.



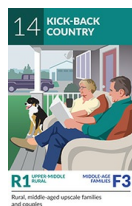
Rank: 2
Customers: 8,699
Customers %: 8.06
% in Benchmark: 2.82
Index: 286

Boomer Bliss consists of older couples and families found in suburban neighbourhoods throughout the country surrounding large cities like Vancouver, Hamilton, St. Catharines and Victoria. Nearly two-thirds of maintainers are over 55 years old, and households include both retirees and those still in the labour force. With their university and college educations, those still employed hold white-collar positions in management, education, health and government services. Their upper-middle-class incomes—about 35 percent above average—allow them to own comfortable single-detached houses built between 1960 and 2000. Many of the adults are longtime residents who have paid off their mortgages and show little interest in leaving their now-empty nests. Like other suburbanites, they score high for owning an SUV, though in this segment it's more likely to be an imported luxury model. Boomer Bliss members take advantage of their proximity to both city centres and small towns, enjoying the arts—including theatre productions, art galleries and rock and country music concerts—and outdoor activities like golfing and fishing. Financially comfortable, they feel secure in their suburban communities filled with like-minded second- and third-generation Canadians, and they score low for Penchant for Risk.



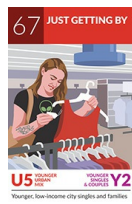
Rank: 3
Customers: 8,325
Customers %: 7.71
% in Benchmark: 1.67
Index: 461

Slow-Lane Suburbs consists of a mix of older and mature singles and couples living in the suburbs of midsize cities like Thunder Bay, Cape Breton, St. John's and Sault Ste. Marie. Most maintainers are over 55, and those still in the labour force typically hold service sector and white-collar jobs in health, food services, sales or retail. With their high school and college educations yielding middle incomes, nearly three-quarters of adults are owners of relatively inexpensive homes. Many are aging in place in a single, semi or duplex in an older neighbourhood. In Slow-Lane Suburbs, two-thirds of households consist of only one or two people. Content in their established communities, more than three-quarters of residents are third-plus-generation Canadians, and they enjoy time-honoured outdoor activities like fishing, hunting and camping. And many have time on their hands to travel to Atlantic Canada and snow bird destinations in Florida. For excitement, they like attending an auto race or golf event. Marketers can reach them with a message that aligns with their belief in Saving on Principle, emphasizing products and services for the frugal minded.



Rank: 4
Customers: 8,239
Customers %: 7.63
% in Benchmark: 2.60
Index: 293

The wealthiest rural lifestyle, Kick-Back Country is a collection of middle-aged families and older couples living in rustic areas near large and medium-size cities. For some, their communities are a weekend getaway from their busy life in the city. The maintainers tend to be between 45 and 64 years old, and children range in age from 10 to 24. Despite mixed educations—mostly high school and college—residents earn impressive incomes averaging about \$150,000 from well-paying jobs in management as well as mining, construction, trades and transportation. The lower cost of living in their rural areas means nearly nine out of ten households own a home. Many are second- and third-generation Canadians drawn to spacious, single-family houses built beyond the urban sprawl; the average dwelling value is over \$570,000—29 percent above average. Their driveways often contain domestic compact SUVs and large pickups for commuting to work, hauling camping and boating equipment and travelling to the city for shopping. With their conservative social views, these households score high for the value Traditional Families.



Rank: 5
Customers: 6,420
Customers %: 5.95
% in Benchmark: 2.60
Index: 229

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.