

Community Profile: Waterloo – University District

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

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

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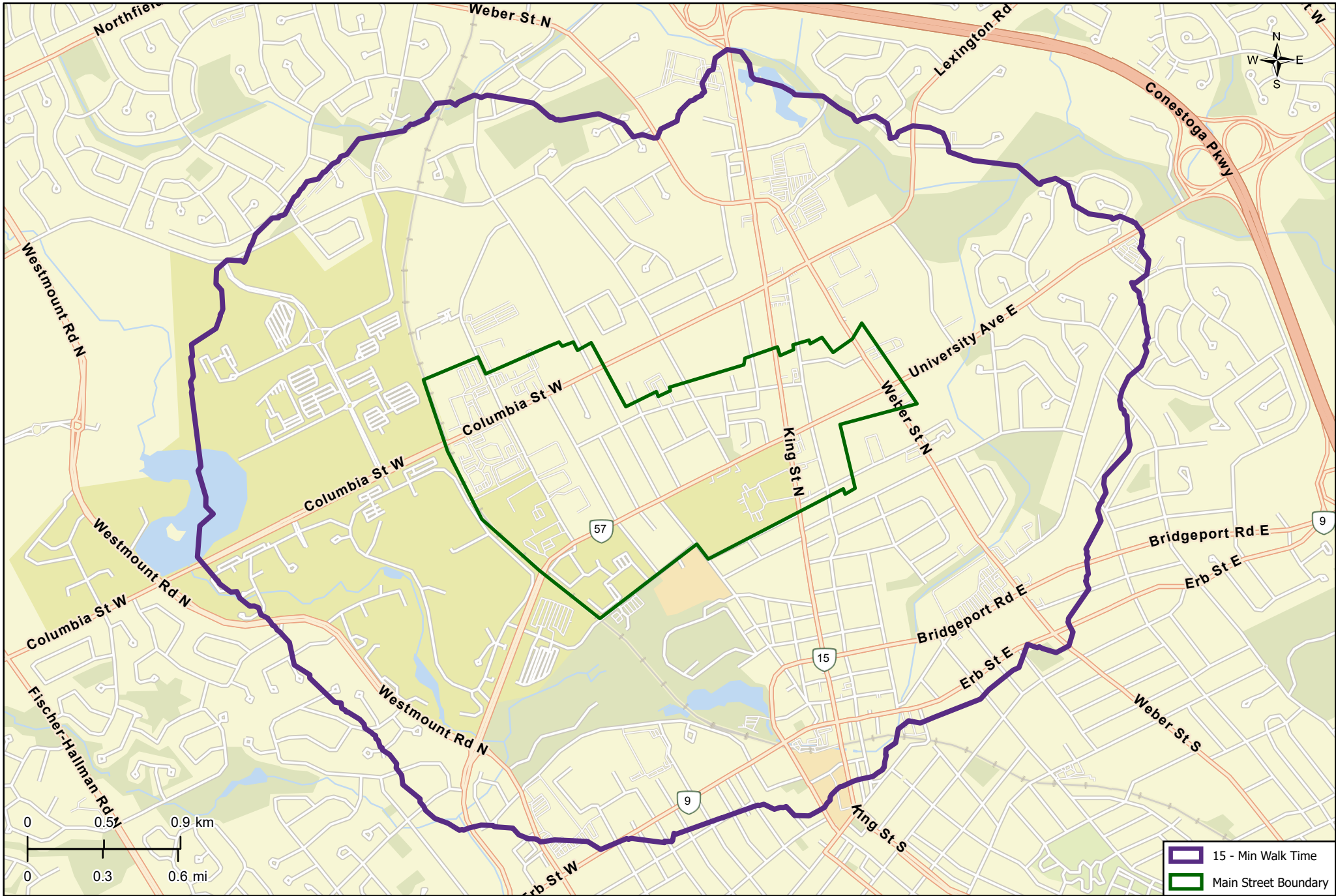
Confidential

Date: February 24, 2022

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Waterloo - University District Main Street Boundary and Trade Area



- 15 - Min Walk Time
- Main Street Boundary

Demographics, PRIZM Profile, and Psychographics

Demographics | Population & Households

Trade Area: Waterloo - University District

POPULATION

20,869

HOUSEHOLDS

9,805

MEDIAN MAINTAINER AGE

33

Index: 60

MARITAL STATUS



32.6%

Index: 56

Married/Common-Law

FAMILY STATUS*

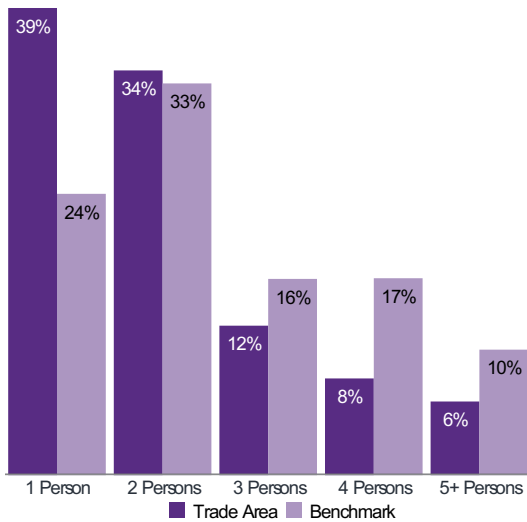


57.2%

Index: 205

Single (Never Legally Married)

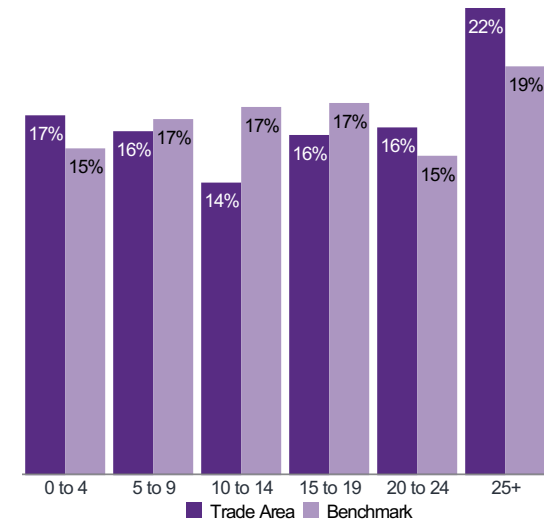
HOUSEHOLD SIZE



POPULATION BY AGE

Age Group	Count	%	Index
0 to 4	554	2.7	53
5 to 9	511	2.4	45
10 to 14	446	2.1	38
15 to 19	1,276	6.1	103
20 to 24	5,447	26.1	391
25 to 29	3,612	17.3	247
30 to 34	1,718	8.2	124
35 to 39	1,037	5.0	77
40 to 44	742	3.6	58
45 to 49	654	3.1	50
50 to 54	690	3.3	50
55 to 59	721	3.5	48
60 to 64	679	3.3	48
65 to 69	686	3.3	58
70 to 74	563	2.7	56
75 to 79	523	2.5	76
80 to 84	425	2.0	93
85+	586	2.8	127

AGE OF CHILDREN AT HOME



Benchmark: Southern Ontario

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*Chosen from index ranking with minimum 5% composition

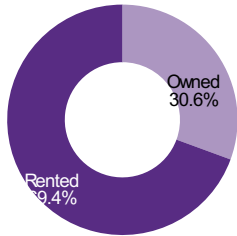
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Demographics | Housing & Income

Trade Area: Waterloo - University District

Population: 20,869 | Households: 9,805

TENURE



STRUCTURE TYPE



30.5%
Index: **39**

Houses



69.5%
Index: **315**

Apartments

AGE OF HOUSING*

Less Than 4 Years Old

% Comp: **15.0** Index: **257**

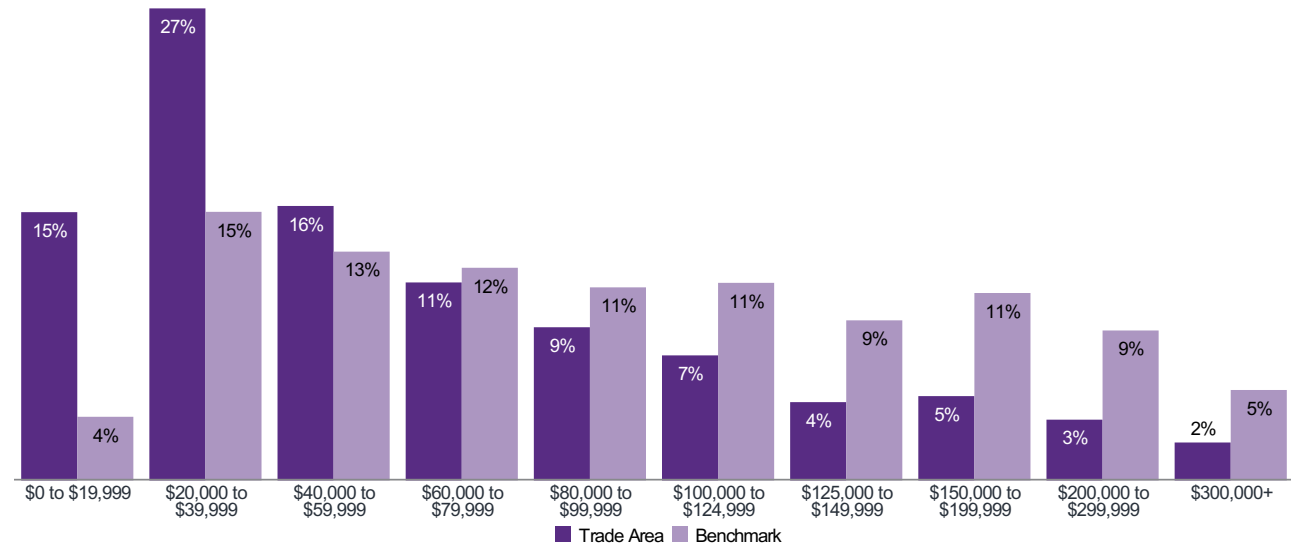
AVERAGE HOUSEHOLD INCOME



\$73,045

Index: **63**

HOUSEHOLD INCOME DISTRIBUTION



Benchmark: Southern Ontario

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Index Colours:	<80	80 - 110	110+
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Demographics | Education & Employment

Trade Area: Waterloo - University District

Population: 20,869 | Households: 9,805

EDUCATION



39.5%

Index: 148

University Degree

LABOUR FORCE PARTICIPATION



53.8%

Index: 83

Participation Rate

METHOD OF TRAVEL TO WORK: TOP 2*



18.6%

Index: 51

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

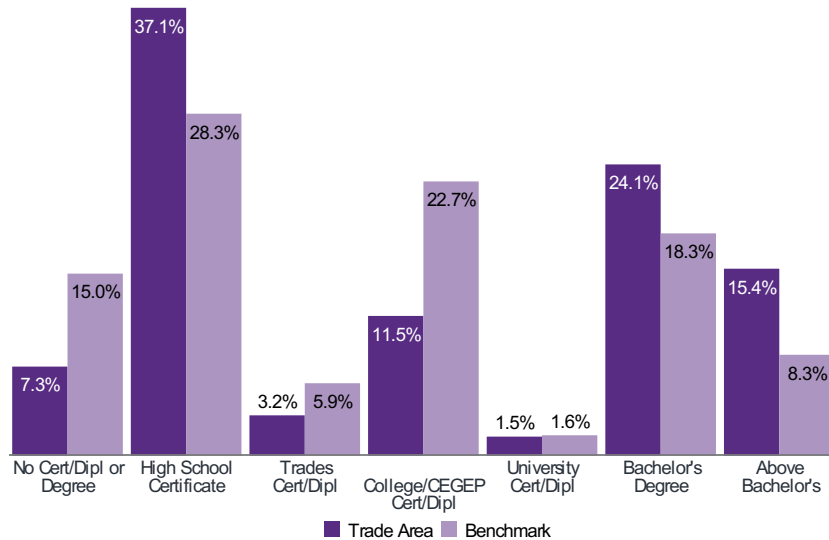


7.4%

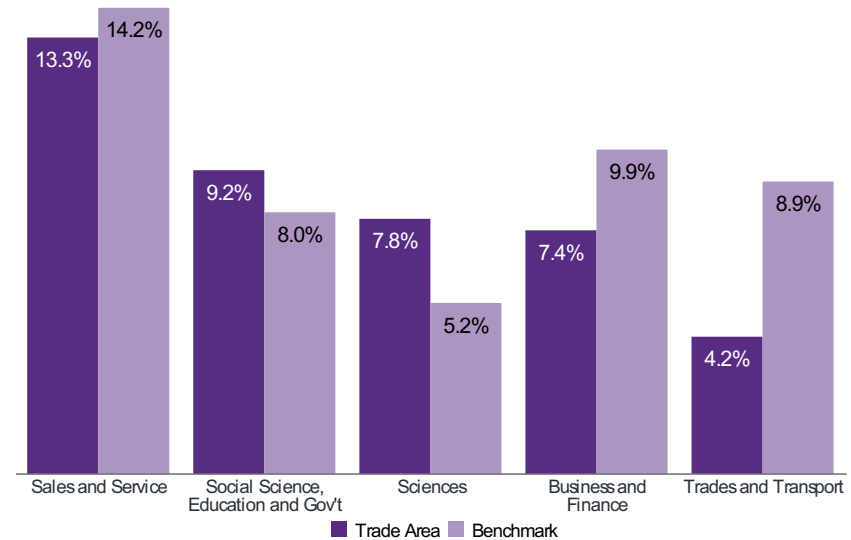
Index: 169

Travel to work by **Public Transit**

EDUCATIONAL ATTAINMENT



OCCUPATIONS: TOP 5*



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*Ranked by percent composition

Index Colours:	<80	80 - 110	110+
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Demographics | Diversity

Trade Area: Waterloo - University District

Population: 20,869 | Households: 9,805

ABORIGINAL IDENTITY



1.4%
Index: **58**

VISIBLE MINORITY PRESENCE



45.2%
Index: **156**

Belong to a visible minority group

NON-OFFICIAL LANGUAGE



1.6%
Index: **79**

No knowledge of English or French

IMMIGRATION



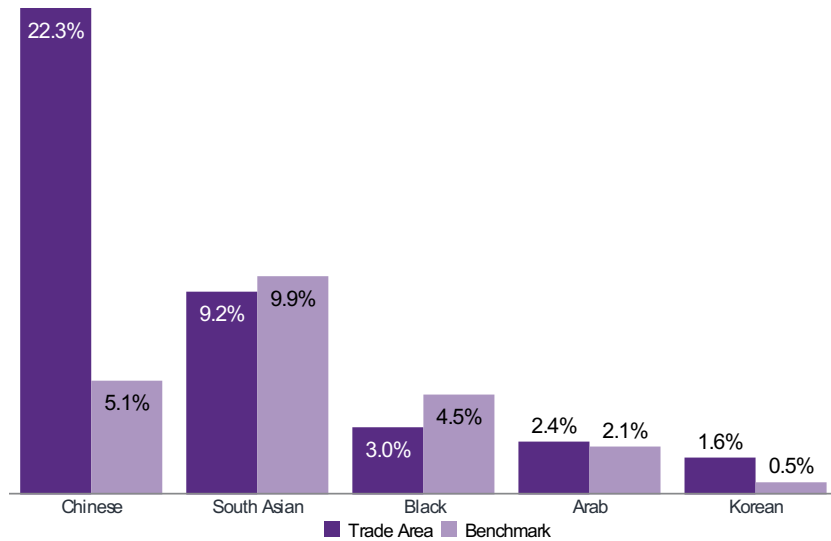
21.9%
Index: **83**

Born outside Canada

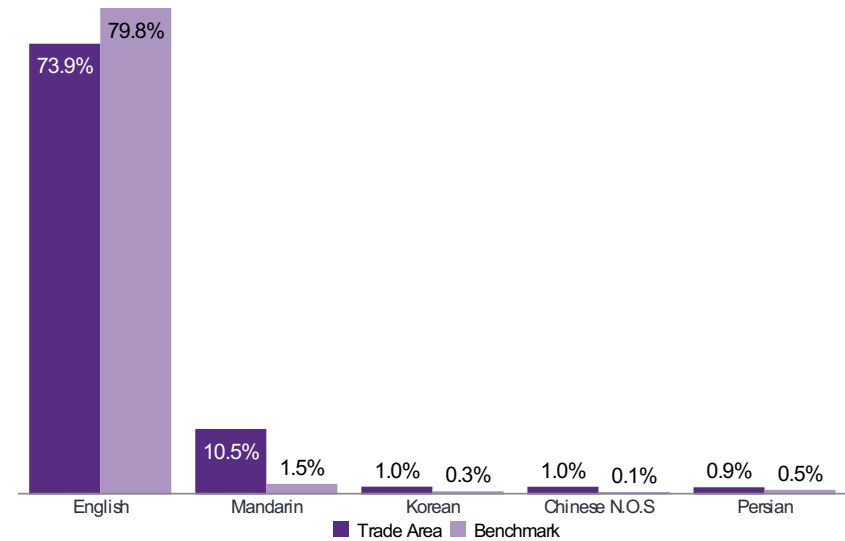
PERIOD OF IMMIGRATION*

2017 To Present
6.5% Index: **144**

VISIBLE MINORITY STATUS: TOP 5**



LANGUAGES SPOKEN AT HOME: TOP 5**



Benchmark: Southern Ontario

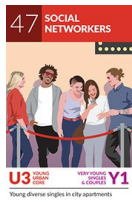
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*Chosen from index ranking with minimum 5% composition

**Ranked by percent composition

Index Colours:	<80	80 - 110	110+
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Top 5 segments represent **79.0%** of households in Waterloo - University District



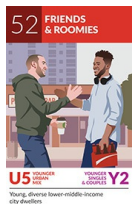
Rank:	1
Hhlds:	3,082
Hhld %:	31.43
% in Benchmark:	1.30
Index:	2,414

The youngest of all the segments, Social Networkers is a transient world of diverse singles living in older or recently built city apartments. With two-thirds of residents unattached, it is also the most single, contributing to the emergence of single-person households as the most common living arrangement in Canada. In these crowded neighbourhoods found in two dozen large cities, more than 45 percent of maintainers are under 35 years old. More than 90 percent live in apartments—typically high-rise buildings. Social Networkers are ethnically diverse, with 50 percent of the population identifying as visible minorities, including Chinese, South Asians, blacks and Filipinos. With their mixed educations—ranging from high school to university—they hold jobs in education, the arts, science and sales. And though household incomes are low, these residents have time and promising careers on their side. For now, however, the above-average cost of downtown real estate keeps this group renting and mobile; two-thirds have moved in the last five years, but you'll usually find them at bars, dance clubs, film festivals and food and wine shows. The marketing messages they respond to reflect their non-stop Pursuit of Intensity.



Rank:	2
Hhlds:	1,657
Hhld %:	16.90
% in Benchmark:	1.14
Index:	1,486

One of four predominantly Asian segments, New Asian Heights reflects the emergence of younger, educated singles and couples living in new high-rise buildings in the urban fringe of Toronto and Vancouver. Nearly three-quarters are foreign-born, most having immigrated since 1990. Almost 40 percent speak a non-official language, with high rates for Mandarin and Cantonese. Still early in their careers, these young adults earn relatively modest salaries from jobs in the sciences, arts and culture, and information and technology. But their parents may be helping with their steep housing costs; the average dwelling value is nearly \$500,000. The increasing popularity of condo living among younger Canadians is evident in New Asian Heights, where nearly 90 percent of households are condo owners or renters. And with relatively few raising children, residents here have enough disposable income to enjoy a lively lifestyle close to downtown amenities. These fitness-conscious households score high for practicing yoga, jogging and working out at a health club. Many also lead busy online lives, logging on to websites for dating, finding jobs and connecting with friends. With their openness to diverse cultures, they respond to marketing messages that support Multiculturalism.



Rank:	3
Hhlds:	1,338
Hhld %:	13.65
% in Benchmark:	2.06
Index:	664

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:	4
Hhlds:	1,149
Hhld %:	11.72
% in Benchmark:	3.77
Index:	311

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 new comers, 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:	524
Hhld %:	5.34
% in Benchmark:	4.40
Index:	121

Mid-City Mellow epitomizes a traditional view of the Canadian Dream: owning a home in an attractive setting while building a comfortable nest egg. In this segment, nearly 90 percent of members own single-detached houses, which typically were built between 1960 and 1990. These older and mature households enjoy upper-middle incomes and well-established neighbourhoods in large cities like Winnipeg, Edmonton, Hamilton and Toronto. With most maintainers over the age of 55, Mid-City Mellow is a mixed group, a collection of both older couples and middle-aged families raising older children. Few segments have a lower five-year mobility rate. Most households contain third-plus-generation Canadians, though there's an above-average concentration of second-generation Canadians and those whose mother tongue is Italian, Portuguese, Polish or Ukrainian. With their high school and college educations, those still in the labour force earn solid paycheques from a mix of white collar, blue collar and service sector jobs. The retirees and soon-to-be retirees here have the time to enjoy sporting events such as horse racing, hockey, baseball and football games. Many book cruises, casino junkets, ski trips and cultural tours as they believe that other cultures have a great deal to teach us (Culture Sampling).

Trade Area: Waterloo - University District

Strong Values

Values	Index
Ecological Concern	130
Culture Sampling	123
Intuition & Impulse	123
Consumptivity	122
Active Government	121
Sexual Permissiveness	121
Rejection of Authority	117
Status via Home	117
Attraction For Crowds	116
Rejection of Orderliness	116

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

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.

Intuition & Impulse

A way of understanding and transacting with the world that largely leaves aside controlled and critical, rational thought. A tendency to be guided less by reason and logic than by one's emotions and feelings. Also, tendencies to be impulsive and spontaneous, able to change one's opinions easily.

Weak Values

Values	Index
Attraction to Nature	68
Cultural Assimilation	77
Religiosity	77
Legacy	80
Primacy of the Family	83
Technology Anxiety	87
Parochialism	88
Utilitarian Consumerism	88
Xenophobia	88
Confidence in Small Business	89

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.

Cultural Assimilation

Lack of openness toward the diverse cultures, ethnic communities and immigrants that make up Canada. A belief that ethnic groups should be encouraged to give up their cultural identities and blend in to the dominant culture.

Religiosity

Placing great importance on religion as a construct which guides one's life. Also, placing great significance on having an affiliation with an organized religious faith. Tendency to consider that religion represents the essential values and education that should be transmitted to the next generation. (Note: Lower scores on this construct should be construed not as anti-religious, but as "Apathetic").

Financial and Expenditure Overview

Financial | WealthScapes Overview

Trade Area: Waterloo - University District

WealthScapes Households: 9,473

INCOME*

Household Income

\$ 73,869

Index: **64**

Household Disposable Income

\$ 60,006

Index: **66**

Household Discretionary Income

\$ 40,158

Index: **62**

Annual RRSP Contributions

\$ 1,934

Index: **54**

WEALTH*



Net Worth

% Holders

99.5% Index: **100**

Balance

\$402,977

Index: **55**

ASSETS*



Savings

% Holders

94.5% Index: **99**

Balance

\$61,864

Index: **81**



Investments

% Holders

49.5% Index: **82**

Balance

\$271,561

Index: **80**



Unlisted Shares

% Holders

11.6% Index: **94**

Balance

\$307,041

Index: **97**



Real Estate

% Holders

33.7% Index: **44**

Balance

\$626,363

Index: **84**



Liquid Assets

% Holders

97.6% Index: **100**

Balance

\$231,720

Index: **70**

DEBT*



Consumer Debt

% Holders

86.4% Index: **95**

Balance

\$29,549

Index: **45**



Mortgage Debt

% Holders

17.8% Index: **38**

Balance

\$260,498

Index: **87**

FINANCIAL RATIO



Debt:Asset

% Holders

0.15% Index: **72**

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: Waterloo - University District

WealthScapes Households: 9,473

FINANCIAL RATIOS*



Debt: Asset

0.15

Index: **72**



Debt: Liquid Assets

0.32

Index: **52**



Consumer Debt - Discr. Income

0.64

Index: **68**



Savings - Investments

0.68

Index: **113**



Pension - Non-Pension Assets

0.24

Index: **109**



Real Estate Assets - Liq. Assets

0.93

Index: **53**



Mortgage - Real Estate Assets

0.22

Index: **91**



Mortgage - Consumer Debt

1.82

Index: **79**

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Index Colours:	<80	80 - 110	110+
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Expenditures | HouseholdSpend - Annual Expenditure Overview

Trade Area: Waterloo - University District

Households: 9,805

Total Aggregate Current Consumption: \$541,519,244

Average Current Consumption

\$55,229

Index **68**

Average Household Income










\$72,416

Index **63**

Average Disposable Income

\$58,414

Index **65**

 <p>Shelter</p> <p>Avg. Dollars/Household: \$15,587 Index 74</p> <p>Pct. of Total Expenditure: 28.2% Index 110</p>	 <p>Food</p> <p>Avg. Dollars/Household: \$8,574 Index 67</p> <p>Pct. of Total Expenditure: 15.5% Index 99</p>	 <p>Transportation</p> <p>Avg. Dollars/Household: \$7,443 Index 54</p> <p>Pct. of Total Expenditure: 13.5% Index 80</p>
 <p>Household Operation</p> <p>Avg. Dollars/Household: \$3,833 Index 67</p> <p>Pct. of Total Expenditure: 6.9% Index 99</p>	 <p>Health Care</p> <p>Avg. Dollars/Household: \$3,412 Index 62</p> <p>Pct. of Total Expenditure: 6.2% Index 92</p>	 <p>Recreation</p> <p>Avg. Dollars/Household: \$3,043 Index 64</p> <p>Pct. of Total Expenditure: 5.5% Index 94</p>
 <p>Tobacco and Alcohol</p> <p>Avg. Dollars/Household: \$2,947 Index 83</p> <p>Pct. of Total Expenditure: 5.3% Index 123</p>	 <p>Education</p> <p>Avg. Dollars/Household: \$2,376 Index 111</p> <p>Pct. of Total Expenditure: 4.3% Index 164</p>	 <p>Clothing</p> <p>Avg. Dollars/Household: \$2,240 Index 68</p> <p>Pct. of Total Expenditure: 4.1% Index 100</p>

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+
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Expenditures | Foodspend - Annual Household Expenditure Overview

Trade Area: Waterloo - University District

Households: 9,805

Average Household Income	Average Food Expenditure	Average Spend on Food from Restaurants	Average Spend on Food from Stores
\$72,416 Index 63	\$8,574 Index 67	\$3,140 Index 78	\$5,433 Index 62

Total Aggregate Food Expenditure: \$ 84,064,578

 <p>Bakery</p> <p>Avg. Dollars/Household: \$553 Index 63</p> <p>Pct. of Total Expenditure: 10.2% Index 102</p>	 <p>Cereal Products</p> <p>Avg. Dollars/Household: \$329 Index 64</p> <p>Pct. of Total Expenditure: 6.1% Index 104</p>	 <p>Fruit and nuts</p> <p>Avg. Dollars/Household: \$668 Index 61</p> <p>Pct. of Total Expenditure: 12.3% Index 98</p>
 <p>Vegetables</p> <p>Avg. Dollars/Household: \$605 Index 65</p> <p>Pct. of Total Expenditure: 11.1% Index 105</p>	 <p>Dairy products & Eggs</p> <p>Avg. Dollars/Household: \$819 Index 64</p> <p>Pct. of Total Expenditure: 15.1% Index 103</p>	 <p>Meat</p> <p>Avg. Dollars/Household: \$832 Index 53</p> <p>Pct. of Total Expenditure: 15.3% Index 85</p>
 <p>Fish & Seafood</p> <p>Avg. Dollars/Household: \$157 Index 53</p> <p>Pct. of Total Expenditure: 2.9% Index 86</p>	 <p>Beverages & Other Food</p> <p>Avg. Dollars/Household: \$1,470 Index 67</p> <p>Pct. of Total Expenditure: 27.1% Index 107</p>	

Benchmark: Southern Ontario

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Displaying the top FoodSpends 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

Activities Look Forward To Doing

	%	Base %	Index
Socializing			
Dating	24.8	11.0	225
Going to restaurants, bars or night clubs	58.4	55.1	106
Having physical Contact with family and friends	59.2	57.7	103
Participating in group activities	43.1	38.7	111
Partying	24.9	15.8	158
Seeing family and friends in person	60.3	62.8	96
Entertainment			
Attending events, festivals or concerts	40.5	42.9	95
Attending sports events (excludes professional sports)	14.0	18.2	77
Attending to professional sports events or games	23.9	25.4	94
Going to the movies	50.2	45.7	110
Movement & Travel			
Driving more	12.7	16.1	79
Shopping in-store	41.1	42.9	96
Spending time outdoors	35.2	32.5	108
Travelling outside of Canada/ abroad	50.0	53.2	94
Travelling within Canada	45.8	49.9	92
Using public transit	19.1	13.7	139
Personal			
Getting back to old habits	35.0	36.2	97
Going to a salon, barber shop or spa	34.6	33.7	103
Going to the gym	26.2	22.6	116
Education/Work			
Children going back to school	10.8	20.3	53
Going back to work	19.2	17.6	109
Other			
Not Stated	0.2	0.6	41

Benchmark: Southern Ontario

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(Base used for Index calculations)

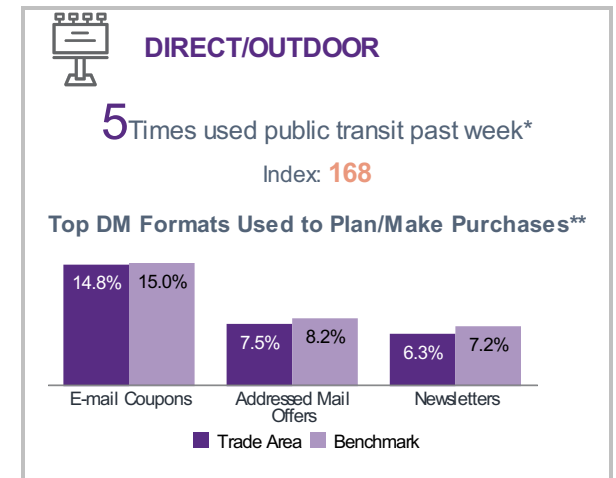
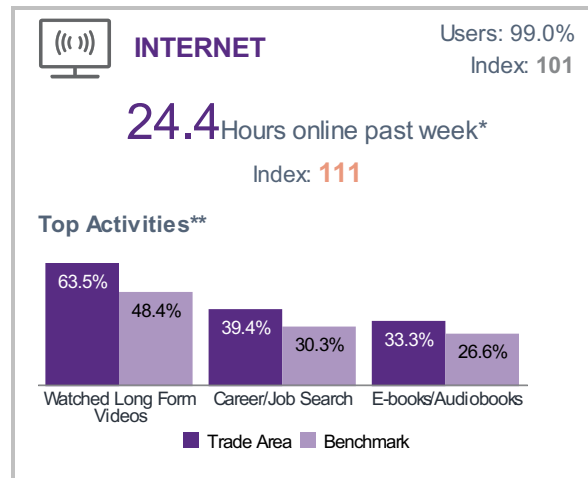
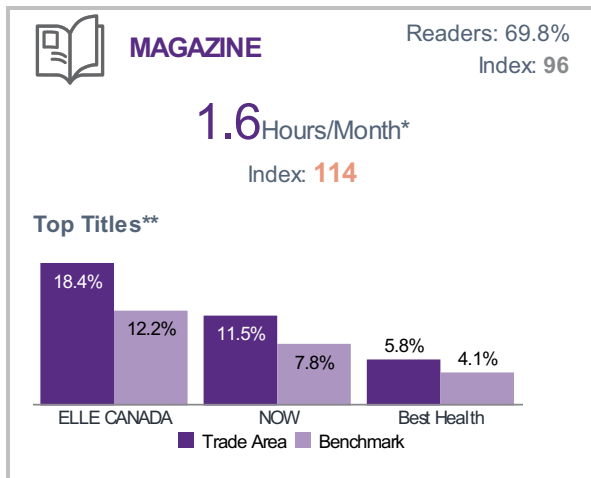
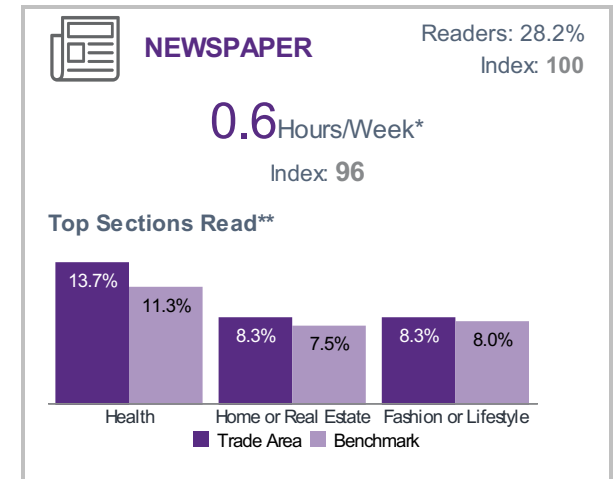
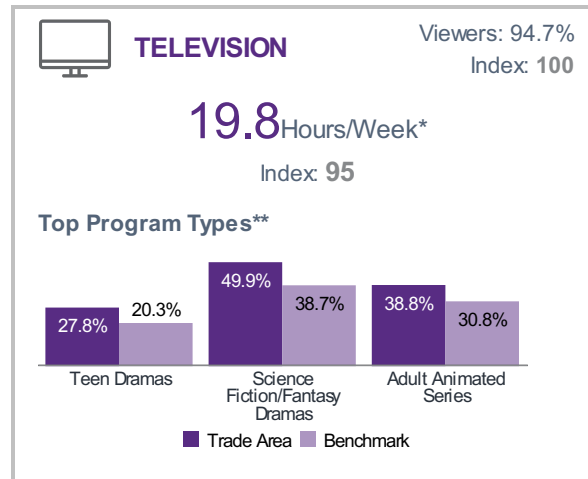
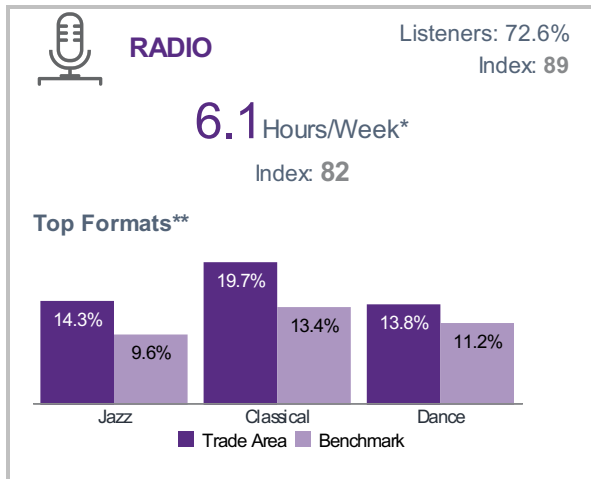
Index Colours:	<80	80 - 110	110+
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Media and Social Media Overview

Behavioural | Media Overview

Trade Area: Waterloo - University District

Household Population 14+: 18,958



Benchmark: Southern Ontario

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* Consumption values based to variable's incidence count.

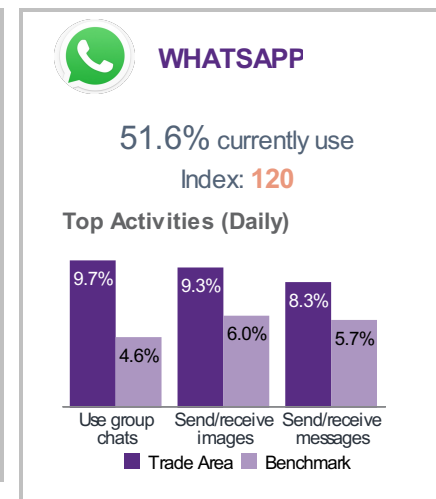
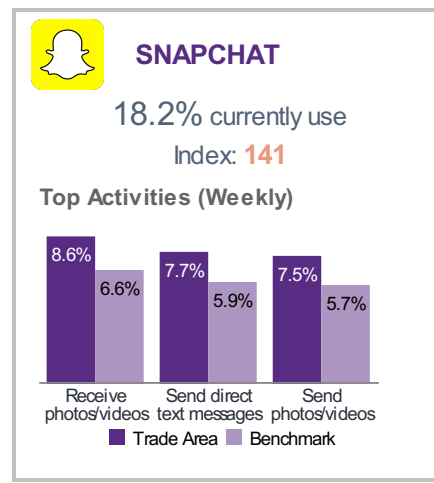
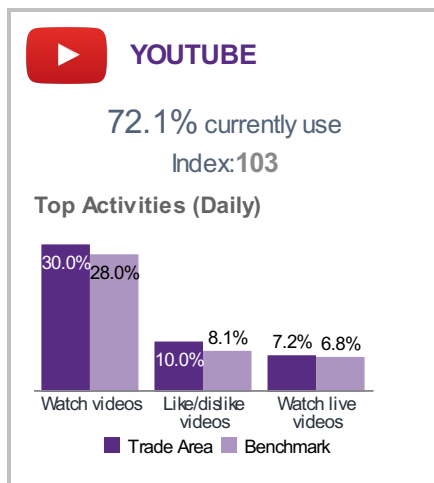
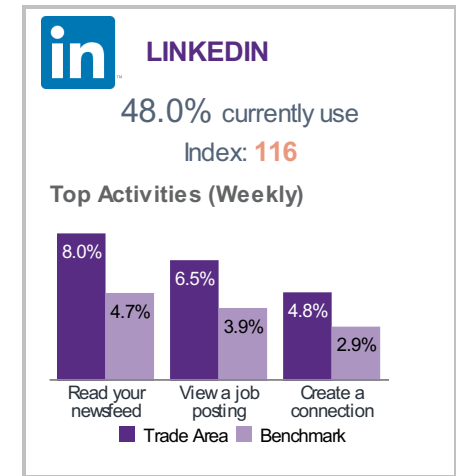
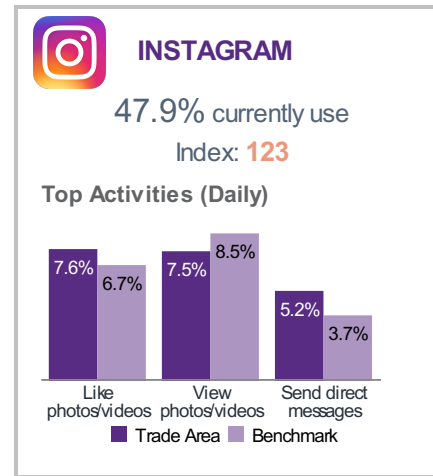
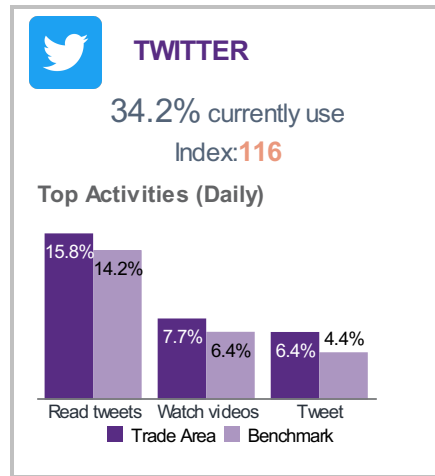
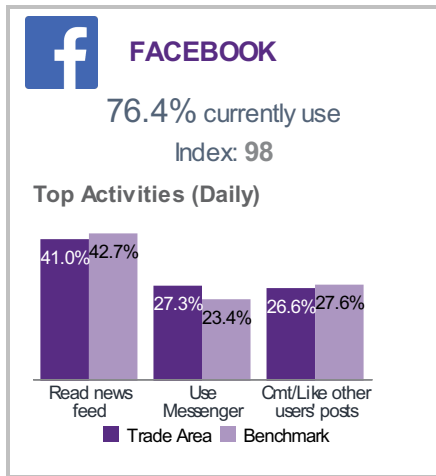
** Chosen from index ranking with minimum 5% composition.



Opticks Social | Social Media Activities

Trade Area: Waterloo - University District

Household Population 18+: 18,120



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+
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Opticks Social | Social Media Usage

Trade Area: Waterloo - University District

Household Population 18+: 18,120

FRIENDS IN ALL SM NETWORKS



28.3%

Index:80

0-49 friends

FREQUENCY OF USE (DAILY)



53.3%

Index:95

Facebook

BRAND INTERACTION



36.0%

Index:105

Like brand on Facebook

NO. OF BRANDS INTERACTED

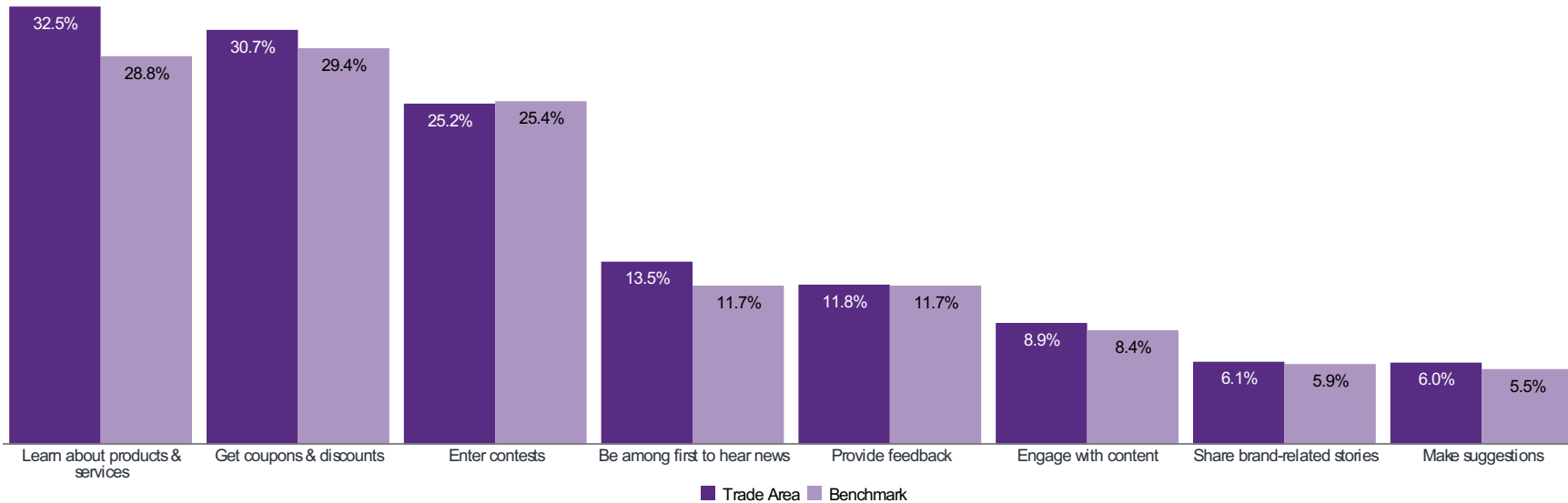


33.3%

Index:109

2-5 brands

REASONS TO FOLLOW BRANDS USING SOCIAL MEDIA



Benchmark: Southern Ontario

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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

Trade Area: Waterloo - University District

Total Household Population 18+:18,120



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

% Comp 81.1 Index 92



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

% Comp 53.4 Index 110



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

% Comp 80.0 Index 95



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

% Comp 40.9 Index 99



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

% Comp 61.2 Index 108



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

% Comp 30.0 Index 100

Benchmark: Southern Ontario

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Ranked by percent composition.

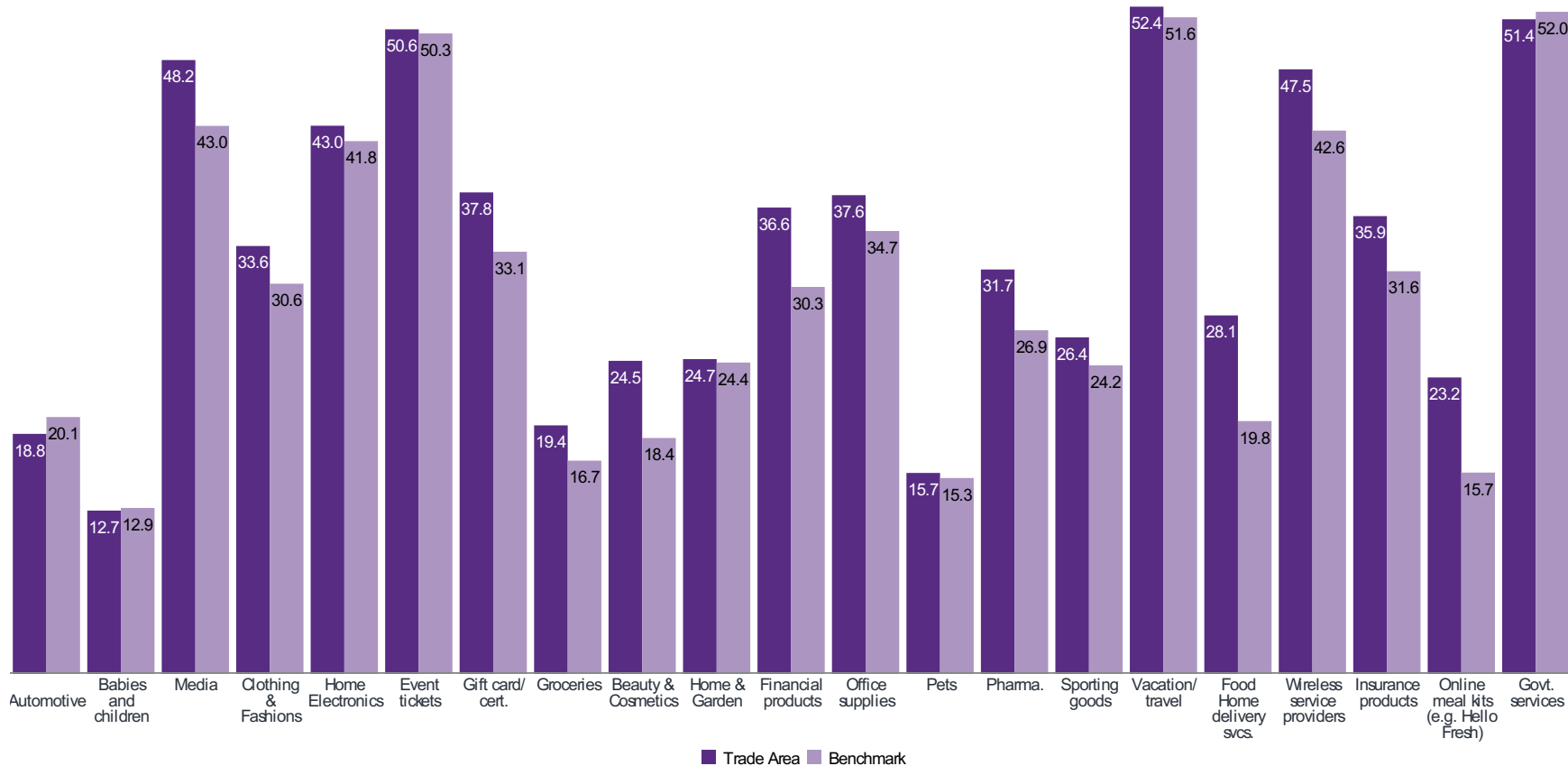
Index Colours:	<80	80 - 110	110+
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Opticks eShopper | Purchase Preference by Category

Trade Area: Waterloo - University District

Total Household Population 18+: 18,120

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

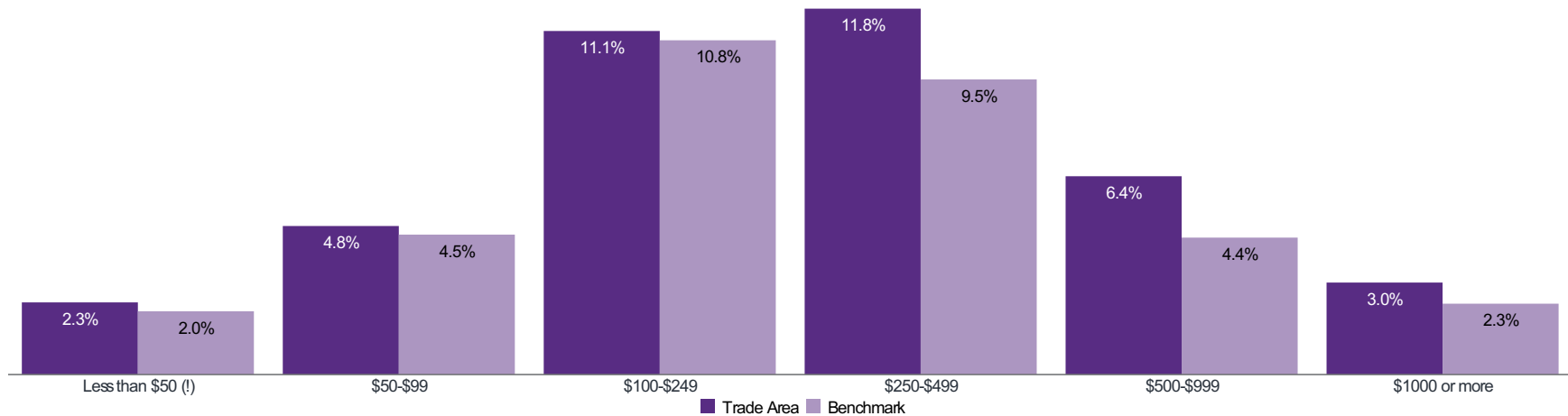
Trade Area: Waterloo - University District

Total Household Population 18+: 18,120

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	56.3% Index:92	43.1% Index:117	16.7% Index:136	5.1% Index:159
Purchase preference	71.4% Index:95	33.6% Index:110	12.8% Index:131	3.3% Index:130
Customer Service	52.4% Index:85	22.0% Index:123	11.6% Index:201	24.2% Index:112

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+
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Opticks eShopper | Home Electronics & Computers Deep Dive

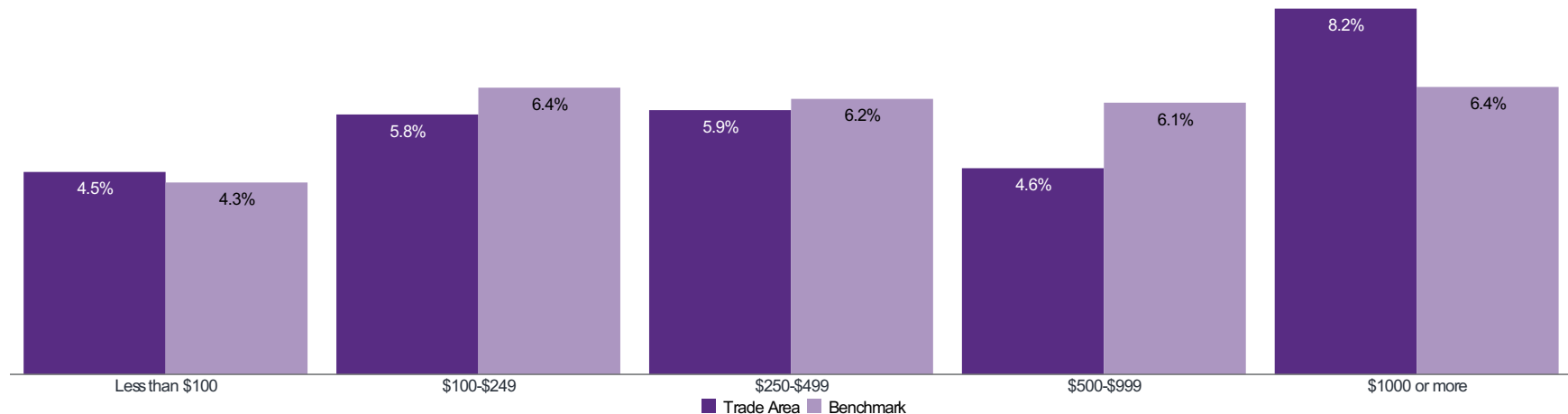
Trade Area: Waterloo - University District

Total Household Population 18+: 18,120

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	44.1% Index:88	56.1% Index:103	19.0% Index: 122
Purchase preference	57.2% Index: 84	43.0% Index:103	14.0% Index:127	5.3% Index: 82
Customer Service	44.9% Index:80	30.6% Index:123	11.7% Index: 159	35.0% Index: 95

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+
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Opticks eShopper | Gift Cards Deep Dive

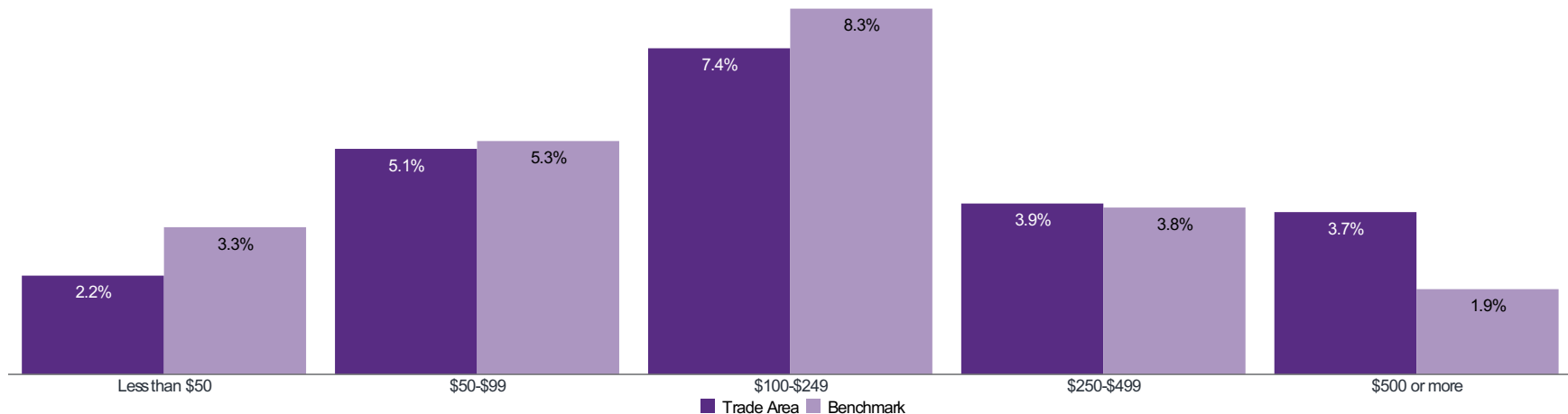
Trade Area: Waterloo - University District

Total Household Population 18+: 18,120

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	39.5% Index:83	39.6% Index:113	15.3% Index:139	3.7% Index:104
Purchase preference	51.1% Index:85	37.8% Index:114	11.6% Index:132	3.9% Index:125
Customer Service	34.9% Index:82	24.4% Index:119	11.2% Index:184	26.8% Index:97

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+
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Opticks eShopper | Groceries Deep Dive

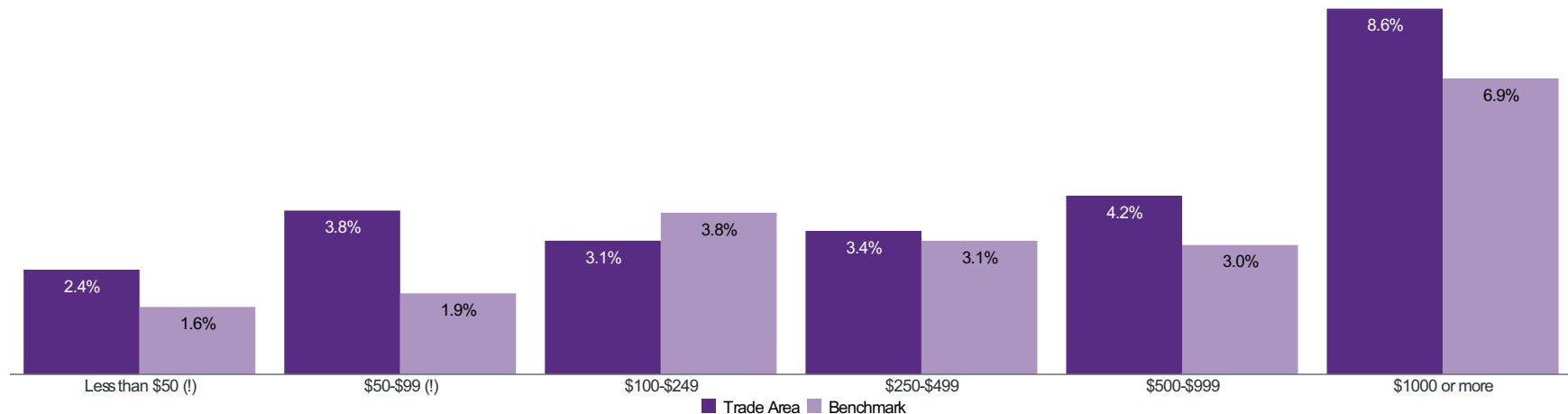
Trade Area: Waterloo - University District

Total Household Population 18+: 18,120

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	66.3% Index:92	30.3% Index:123	13.7% Index:124	4.7% Index:174
Purchase preference	78.0% Index:93	19.4% Index:117	8.7% Index:140	3.9% Index:159
Customer Service	57.1% Index:82	17.1% Index:148	7.3% Index:183	23.4% Index:125

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+
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Opticks eShopper | Beauty & Cosmetics Deep Dive

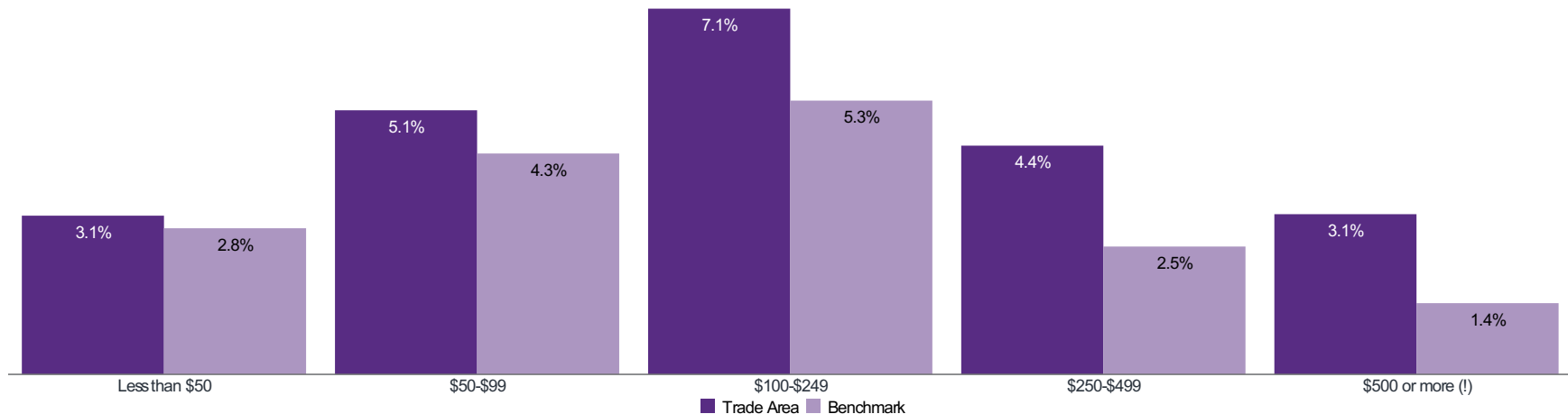
Trade Area: Waterloo - University District

Total Household Population 18+: 18,120

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	36.0% Index:101	28.5% Index:129	12.4% Index:153	3.9% Index:137
Purchase preference	46.9% Index:101	24.5% Index:133	9.0% Index:141	4.2% Index:182
Customer Service	35.9% Index:99	17.1% Index:136	8.0% Index:184	19.3% Index:131

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+
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Opticks eShopper | Home & Garden Deep Dive

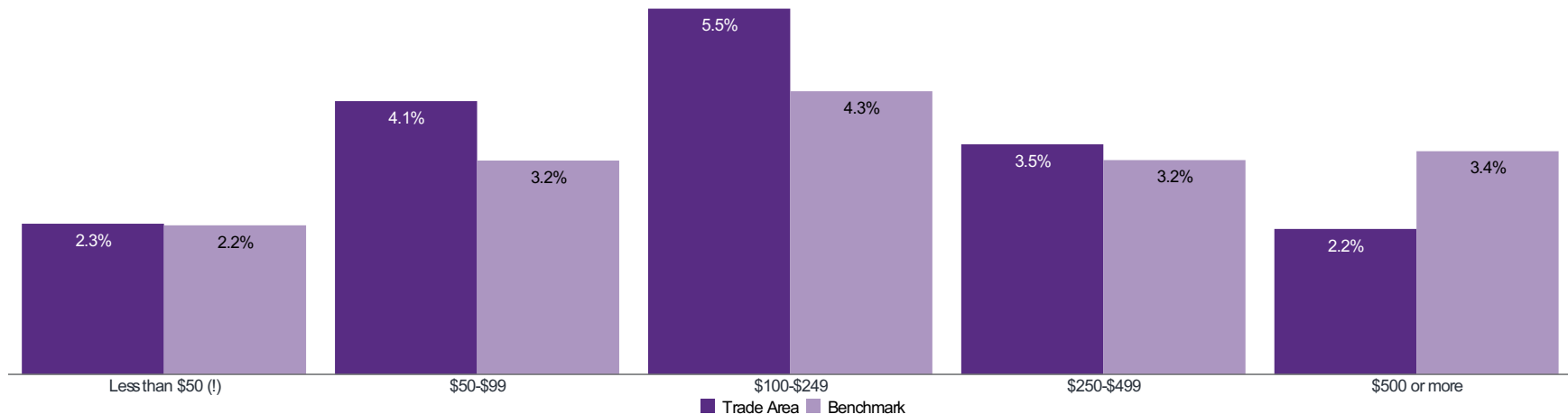
Trade Area: Waterloo - University District

Total Household Population 18+: 18,120

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	41.7% Index:81	33.3% Index:88	13.4% Index:117	5.6% Index:97
Purchase preference	53.7% Index:79	24.7% Index:101	9.1% Index:130	3.7% Index:102
Customer Service	38.7% Index:72	21.3% Index:133	6.0% Index:125	20.8% 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+
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Opticks eShopper | Sporting Goods Deep Dive

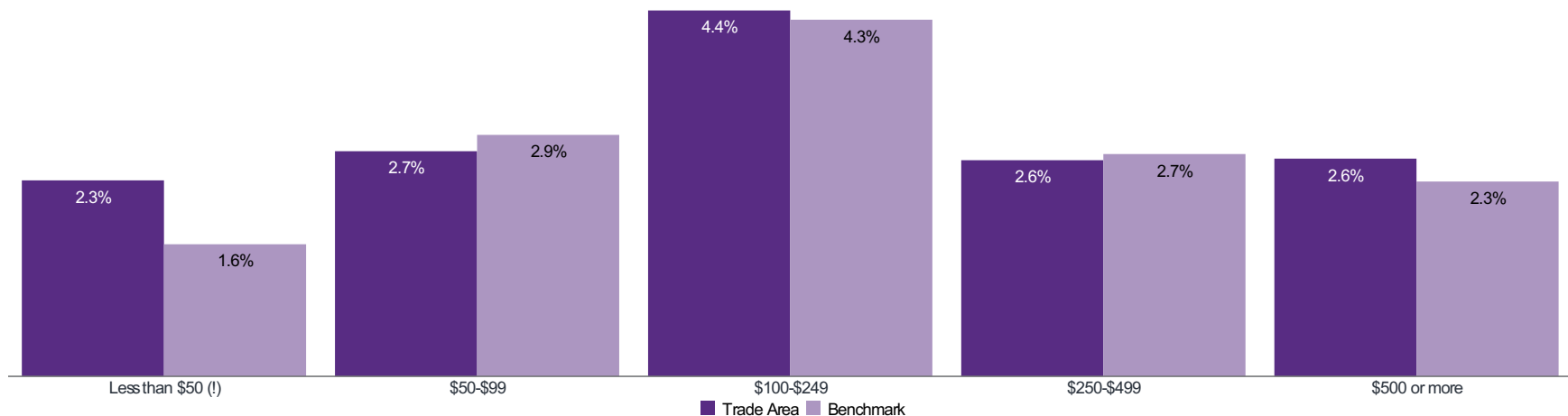
Trade Area: Waterloo - University District

Total Household Population 18+: 18,120

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	35.9% Index:92	32.1% Index:99	13.2% Index:126	6.1% Index:156
Purchase preference	46.8% Index:90	26.4% Index:109	9.0% Index:119	3.6% Index:118
Customer Service	35.7% Index:85	20.4% Index:135	8.2% Index:160	19.9% Index:97

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+
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Opticks eShopper | Vacation/Travel Deep Dive

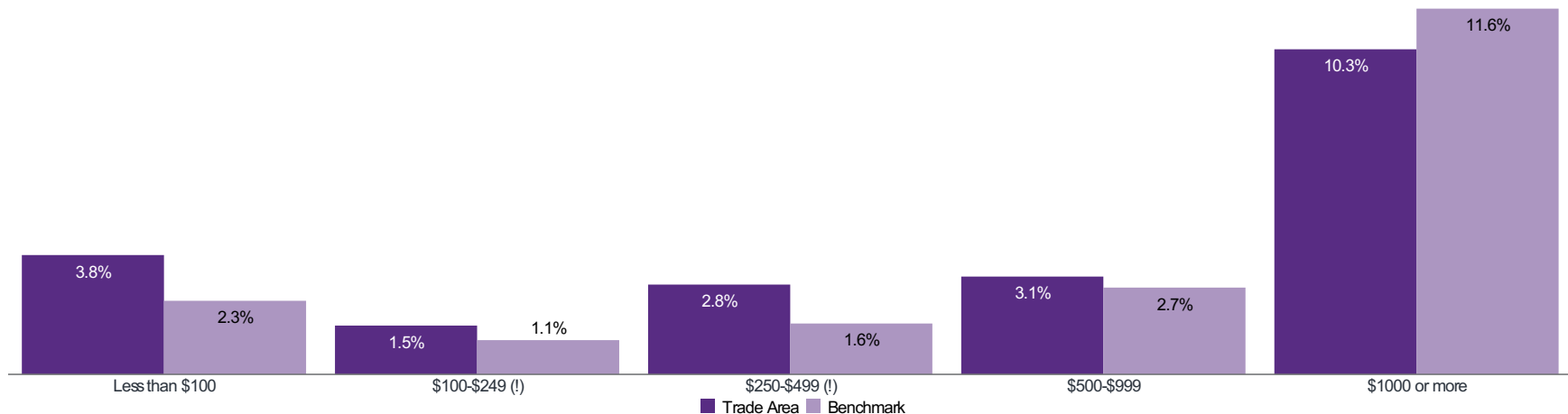
Trade Area: Waterloo - University District

Total Household Population 18+: 18,120

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	16.6% Index:81	58.8% Index:101	19.6% Index:131	15.3% Index:95
Purchase preference	22.4% Index:78	52.4% Index:102	9.1% Index:105	15.1% Index:84
Customer Service	25.3% Index:87	29.7% Index:108	10.1% Index:146	40.6% 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+
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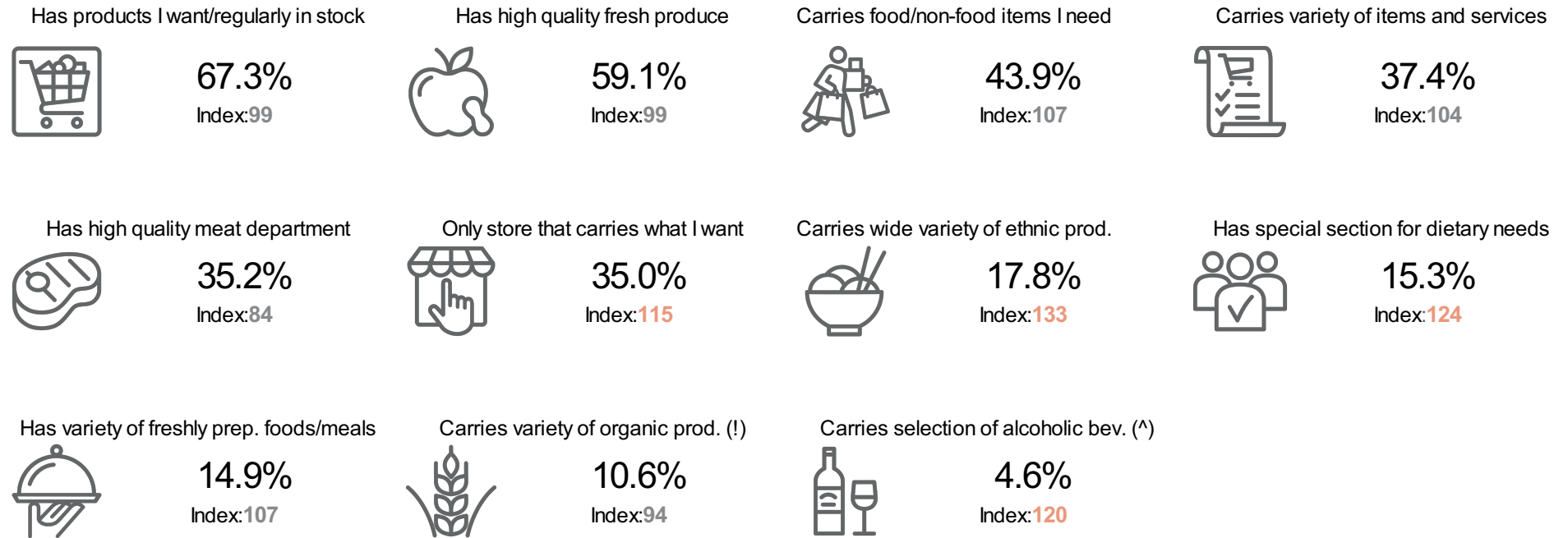
Store Loyalty

ShopperChoice | Store Loyalty - Assortment / Product Quality

Trade Area: Waterloo - University District

Households: 9,805

STORE LOYALTY INFLUENCES - HIGHLY INFLUENTIAL ASSORTMENT / PRODUCT QUALITY



Benchmark: Southern Ontario

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

(^) Represents extremely 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+

Trade Area: Waterloo - University District

Households: 9,805

STORE LOYALTY INFLUENCES - HIGHLY INFLUENTIAL CONVENIENCE / SHOPPING EXPERIENCE

Convenient location for me



71.1%
Index: 119

Easy to get in and get out quickly



48.9%
Index: 114

Organized layout makes it easy to shop



38.5%
Index: 92

Short checkout lines/fast checkout



33.6%
Index: 94

Has extended hours



29.7%
Index: 108

Staff are friendly and knowledgeable



27.4%
Index: 81

I like the store ambiance



24.3%
Index: 122

Has self-checkout



19.7%
Index: 144

Offers an online shopping option (!)



9.8%
Index: 111

Benchmark: Southern Ontario

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

(^) Represents extremely 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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Trade Area: Waterloo - University District

Households: 9,805

STORE LOYALTY INFLUENCES - HIGHLY INFLUENTIAL PRICE AND PROMO

Discover good value when shopping



71.3%
Index: 108

Store has the lowest prices overall



65.2%
Index: 112

Store has great sales and promotions



65.0%
Index: 96

Store has a customer loyalty card program



48.0%
Index: 97

Has loyalty prog. app and offers pers. promos



36.9%
Index: 126

I'm loyal to their store brands



23.9%
Index: 104

OUT OF STOCK ITEM

	% Base	% Pen	Index
Psychographics - Shopping Preferences			
Postpone the purchase	39.8	40.2	99
Leave the store and buy it elsewhere	29.2	30.9	95
Purchase another brand	22.2	21.2	104
Purchase another size or variety of the same brand (!)	8.7	7.7	113

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 Waterloo - University District 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%	466,118	100%	2.41%	100	475,666	100%	2.46%	100	405,016	100%	2.10%	100	415,459	100%	2.15%	100	704,076	100%	3.65%	100
3530013	Kitchener, ON (CY)	212,928	1.10%	112,805	24.20%	52.98%	2194	109,559	23.03%	51.45%	2088	99,848	24.65%	46.89%	2235	99,937	24.05%	46.93%	2181	136,575	19.40%	64.14%	1758
3530016	Waterloo, ON (CY)	99,847	0.52%	78,997	16.95%	79.12%	3276	73,071	15.36%	73.18%	2970	77,586	19.16%	77.70%	3703	70,945	17.08%	71.05%	3301	88,816	12.61%	88.95%	2439
3520005	Toronto, ON (C)	2,568,898	13.31%	32,982	7.08%	1.28%	53	34,261	7.20%	1.33%	54	29,632	7.32%	1.15%	55	28,109	6.77%	1.09%	51	61,230	8.70%	2.38%	65
3530010	Cambridge, ON (CY)	114,129	0.59%	27,670	5.94%	24.24%	1004	27,261	5.73%	23.89%	969	23,496	5.80%	20.59%	981	24,084	5.80%	21.10%	980	42,155	5.99%	36.94%	1013
3521005	Mississauga, ON (CY)	642,951	3.33%	16,088	3.45%	2.50%	104	17,613	3.70%	2.74%	111	12,711	3.14%	1.98%	94	14,022	3.38%	2.18%	101	28,246	4.01%	4.39%	120
3523008	Guelph, ON (CY)	121,691	0.63%	14,521	3.12%	11.93%	494	15,964	3.36%	13.12%	532	13,997	3.46%	11.50%	548	14,477	3.48%	11.90%	553	25,435	3.61%	20.90%	573
3521010	Brampton, ON (CY)	596,084	3.09%	12,539	2.69%	2.10%	87	15,729	3.31%	2.64%	107	9,424	2.33%	1.58%	75	11,669	2.81%	1.96%	91	24,359	3.46%	4.09%	112
3525005	Hamilton, ON (C)	483,265	2.50%	10,029	2.15%	2.08%	86	12,088	2.54%	2.50%	102	8,206	2.03%	1.70%	81	10,026	2.41%	2.07%	96	20,949	2.98%	4.33%	119
3539036	London, ON (CY)	349,526	1.81%	8,110	1.74%	2.32%	96	8,263	1.74%	2.36%	96	6,670	1.65%	1.91%	91	7,995	1.92%	2.29%	106	16,379	2.33%	4.69%	128
3519036	Markham, ON (CY)	301,247	1.56%	8,361	1.79%	2.78%	115	9,304	1.96%	3.09%	125	6,008	1.48%	1.99%	95	6,776	1.63%	2.25%	105	14,006	1.99%	4.65%	127

Index Legend	Under 80	110 to 119	120 to 149	Over 150
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**2019 Waterloo - University District 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
18,842	18,469	98.0	14,650	77.8	19,135	101.6	13,691	72.7	23,715	125.9

**2019 Waterloo - University District Visitors Within vs Outside Trade Area
Benchmark: Canada**

Year	Total Visitors In Main Street Polyzon	# Visitors Within 15 min TA	% Visitors Within 15 min TA	# Visitors Outside 15 min TA	% Visitors Outside 15 min TA
Full Year 2019	716,452	23,715	3.3	692,737	96.7

**2020 Waterloo - University District 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%	242,538	100%	1.26%	100	354,111	100%	1.83%	100	320,216	100%	1.66%	100	345,763	100%	1.79%	100	529,275	100%	2.74%	100
3530013	Kitchener, ON (CY)	212,928	1.10%	68,778	28.36%	32.30%	2571	87,926	24.83%	41.29%	2251	87,301	27.26%	41.00%	2472	85,337	24.68%	40.08%	2237	116,750	22.06%	54.83%	2000
3530016	Waterloo, ON (CY)	99,847	0.52%	61,110	25.20%	61.20%	4871	67,329	19.01%	67.43%	3676	70,312	21.96%	70.42%	4245	75,514	21.84%	75.63%	4222	82,168	15.52%	82.29%	3001
3520005	Toronto, ON (C)	2,568,898	13.31%	12,428	5.12%	0.48%	39	25,922	7.32%	1.01%	55	20,664	6.45%	0.80%	48	22,230	6.43%	0.87%	48	42,794	8.09%	1.67%	61
3530010	Cambridge, ON (CY)	114,129	0.59%	12,671	5.22%	11.10%	884	18,229	5.15%	15.97%	871	19,190	5.99%	16.81%	1014	17,722	5.13%	15.53%	867	31,305	5.91%	27.43%	1000
3521005	Mississauga, ON (CY)	642,951	3.33%	6,481	2.67%	1.01%	80	10,736	3.03%	1.67%	91	8,157	2.55%	1.27%	76	10,332	2.99%	1.61%	90	18,769	3.55%	2.92%	106
3523008	Guelph, ON (CY)	121,691	0.63%	6,827	2.81%	5.61%	446	11,008	3.11%	9.05%	493	9,660	3.02%	7.94%	479	10,565	3.06%	8.68%	485	18,268	3.45%	15.01%	547
3521010	Brampton, ON (CY)	596,084	3.09%	4,214	1.74%	0.71%	56	8,378	2.37%	1.41%	77	6,373	1.99%	1.07%	64	6,714	1.94%	1.13%	63	14,123	2.67%	2.37%	86
3525005	Hamilton, ON (C)	483,265	2.50%	3,973	1.64%	0.82%	65	7,074	2.00%	1.46%	80	5,949	1.86%	1.23%	74	7,104	2.05%	1.47%	82	13,282	2.51%	2.75%	100
3530035	Woolwich, ON (TP)	22,045	0.11%	7,923	3.27%	35.94%	2860	8,974	2.53%	40.71%	2219	8,979	2.80%	40.73%	2455	10,476	3.03%	47.52%	2653	12,516	2.36%	56.77%	2071
3539036	London, ON (CY)	349,526	1.81%	3,233	1.33%	0.92%	74	5,140	1.45%	1.47%	80	5,403	1.69%	1.55%	93	5,100	1.48%	1.46%	81	10,156	1.92%	2.91%	106

Index Legend	Under 80	110 to 119	120 to 149	Over 150
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**2020 Waterloo - University District 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
18,842	12,102	64.2	12,053	64.0	16,452	87.3	19,502	103.5	21,026	111.6

**2020 Waterloo - University District Visitors Within vs Outside Trade Area
Benchmark: Canada**

Year	Total Visitors In Main Street Polvzon	# Visitors Within 15 min TA	% Visitors Within 15 min TA	# Visitors Outside 15 min TA	% Visitors Outside 15 min TA
Full Year 2020	534,053	21,026	3.9	513,026	96.1

**2021 Waterloo - University District 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%	251,620	100%	1.30%	100	470,232	100%	2.44%	100	459,812	100%	2.38%	100	320,971	100%	1.66%	100	619,595	100%	3.21%	100
3530013	Kitchener, ON (CY)	212,928	1.10%	69,245	27.52%	32.52%	2495	97,021	20.63%	45.57%	1870	94,217	20.49%	44.25%	1858	86,263	26.88%	40.51%	2436	117,752	19.00%	55.30%	1723
3530016	Waterloo, ON (CY)	99,847	0.52%	55,088	21.89%	55.17%	4232	66,160	14.07%	66.26%	2720	81,052	17.63%	81.18%	3408	70,761	22.05%	70.87%	4262	85,558	13.81%	85.69%	2670
3520005	Toronto, ON (C)	2,568,898	13.31%	16,544	6.58%	0.64%	49	40,918	8.70%	1.59%	65	32,848	7.14%	1.28%	54	21,056	6.56%	0.82%	49	56,181	9.07%	2.19%	68
3530010	Cambridge, ON (CY)	114,129	0.59%	12,253	4.87%	10.74%	824	30,349	6.45%	26.59%	1092	24,538	5.34%	21.50%	903	17,536	5.46%	15.36%	924	37,199	6.00%	32.59%	1015
3521005	Mississauga, ON (CY)	642,951	3.33%	7,096	2.82%	1.10%	85	22,291	4.74%	3.47%	142	18,783	4.08%	2.92%	123	9,624	3.00%	1.50%	90	28,901	4.66%	4.50%	140
3523008	Guelph, ON (CY)	121,691	0.63%	6,897	2.74%	5.67%	435	12,187	2.59%	10.01%	411	15,069	3.28%	12.38%	520	8,912	2.78%	7.32%	440	21,354	3.45%	17.55%	547
3521010	Brampton, ON (CY)	596,084	3.09%	7,027	2.79%	1.18%	90	14,071	2.99%	2.36%	97	13,208	2.87%	2.22%	93	7,990	2.49%	1.34%	81	21,306	3.44%	3.57%	111
3525005	Hamilton, ON (C)	483,265	2.50%	4,101	1.63%	0.85%	65	9,680	2.06%	2.00%	82	10,718	2.33%	2.22%	93	4,534	1.41%	0.94%	56	14,472	2.34%	2.99%	93
3519036	Markham, ON (CY)	301,247	1.56%	2,840	1.13%	0.94%	72	13,106	2.79%	4.35%	179	10,440	2.27%	3.47%	145	2,869	0.89%	0.95%	57	13,014	2.10%	4.32%	135
3539036	London, ON (CY)	349,526	1.81%	2,590	1.03%	0.74%	57	6,180	1.31%	1.77%	73	7,879	1.71%	2.25%	95	4,458	1.39%	1.28%	77	11,670	1.88%	3.34%	104

Index Legend	Under 80	110 to 119	120 to 149	Over 150
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**2021 Waterloo - University District 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
18,842	11,447	60.8	13,997	74.3	29,249	155.2	17,147	91.0	28,957	153.7

**2021 Waterloo - University District Visitors Within vs Outside Trade Area
Benchmark: Canada**

Year	Total Visitors In Main Street Polvzon	# Visitors Within 15 min TA	% Visitors Within 15 min TA	# Visitors Outside 15 min TA	% Visitors Outside 15 min TA
Full Year 2021	631,819	28,957	4.6	602,862	95.4

Top 5 segments represent **30.9%** of customers in Southern Ontario



Rank: 1
 Customers: 36,556
 Customers %: 6.86
 % in Benchmark: 5.19
 Index: 132

One of the wealthier suburban lifestyles, Multiculture-ish is an ethnically diverse segment of middle-aged Asian and South Asian households. Located in and around major cities like Toronto, Calgary and Edmonton, many of these neighbourhoods emerged 20 years ago as new suburban subdivisions. Today, they're slowly being overtaken by urban sprawl and infill developments. More than 40 percent of residents are immigrants, and the rest are typically second-generation Canadians who've settled in houses built since 1990. A quarter speak a non-official language, the most common being Mandarin, Cantonese and Punjabi, but residents also disproportionately speak Arabic, Urdu and Russian at home. Multiculture-ish households tend to be large—double the national average for four or more people—and the significant presence of children over the age of 5 influences their preference for family-friendly outings to theme parks, zoos and aquariums. Having completed university and college educations, these adults enjoy upscale incomes—earned from jobs in management, business and the sciences—that are 50 percent higher than the national average and that allow them to exercise Ostentatious Consumption by purchasing items that symbolize affluence.



Rank: 2
 Customers: 35,606
 Customers %: 6.68
 % in Benchmark: 4.68
 Index: 143

Comprising more than a million people, Family Mode is one of the largest segments—and growing. Home to large, suburban families living in recently built houses, this lifestyle is rooted in midsize cities surrounding large metro areas. Its neighbourhoods are filled with maintainers between 35 and 54, and children over the age of 10. These middle-aged adults have used their mostly high school and college educations to land a variety of decent-paying jobs—from blue-collar to management level—in industries like retail, public administration, education and utilities. Thanks to dual-income households, their upscale incomes allow them to purchase single-detached houses valued at nearly \$450,000—close to the national average. As in other suburban family segments, sports are central to the Family Mode lifestyle, with many garages filled with skiing, golfing and hockey equipment, as well as trailers and boats. Family Mode members make an Effort Toward Health, often working out at fitness clubs and enrolling their kids in soccer, swimming and ice skating.



Rank: 3
 Customers: 33,941
 Customers %: 6.37
 % in Benchmark: 4.63
 Index: 138

Mid-City Mellow epitomizes a traditional view of the Canadian Dream: owning a home in an attractive setting while building a comfortable nest egg. In this segment, nearly 90 percent of members own single-detached houses, which typically were built between 1960 and 1990. These older and mature households enjoy upper-middle incomes and well-established neighbourhoods in large cities like Winnipeg, Edmonton, Hamilton and Toronto. With most maintainers over the age of 55, Mid-City Mellow is a mixed group, a collection of both older couples and middle-aged families raising older children. Few segments have a lower five-year mobility rate. Most households contain third-plus-generation Canadians, though there's an above-average concentration of second-generation Canadians and those whose mother tongue is Italian, Portuguese, Polish or Ukrainian. With their high school and college educations, those still in the labour force earn solid paycheques from a mix of white collar, blue collar and service sector jobs. The retirees and soon-to-be retirees here have the time to enjoy sporting events such as horse racing, hockey, baseball and football games. Many book cruises, casino junkets, ski trips and cultural tours as they believe that other cultures have a great deal to teach us (Culture Sampling).



Rank: 4
 Customers: 31,965
 Customers %: 6.00
 % in Benchmark: 4.16
 Index: 144

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: 26,862
 Customers %: 5.04
 % in Benchmark: 3.30
 Index: 153

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.

Benchmark:Southern Ontario

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