

Digging into the data: The impact of COVID-19 on business areas and tourism

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ENVIRONICS
ANALYTICS



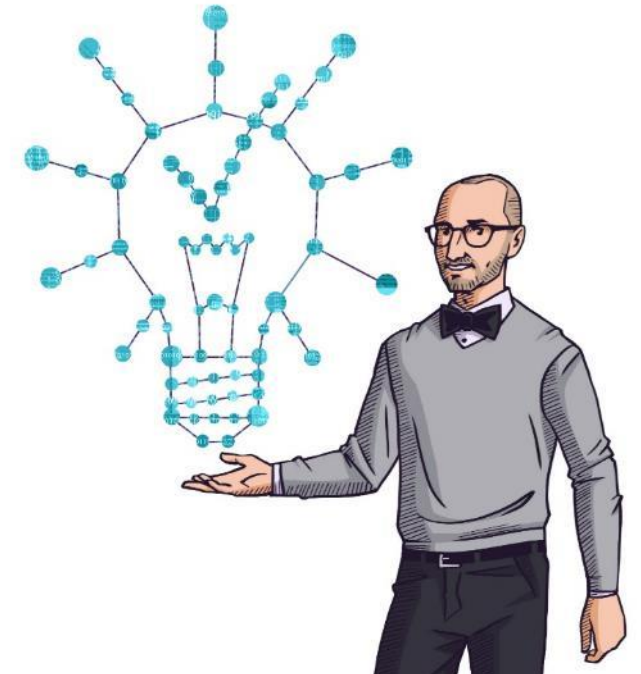
Canadian
Urban
Institute

Institut
Urbain du
Canada

Who We Are

We make peoples' lives better and our clients more successful through transformative data, insights and analytics.

- Founded in 2003
- 2,500+ clients across every industry sector
- 250+ employees: geographers, statisticians, mathematicians, modelers, marketers and business strategists



Data Development

Used by over 1,000 Canadian Organizations

Comprehensive
High Quality
Proprietary
Actionable



30,000 Current Variables at Postal Code Level



Demographic



Behavioural



Segmentation



Financial



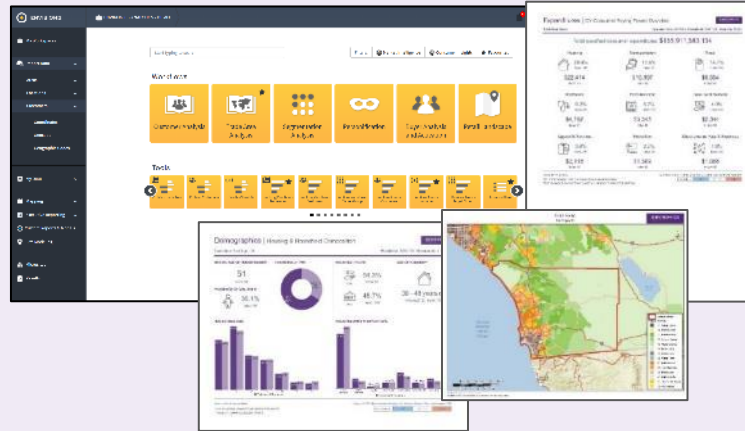
Mobile Analytics



Psychographic

Advanced Analytics

80% in Subscription & Purpose-Built Platform



Segments &
Personas



Target
Marketing



Cross
Selling



Product
Assortment



Media
Planning



Message
Targeting



Site
Selection



Omni-
Channel

Marketing Activation

The “Intel Inside” in All Channels

Traditional Media



BellMedia
corus.

BellMedia
PATTISON

ROGERS
Sports & Media

VISTAR MEDIA

kinetic



Digital, Online, and Social



BellMedia

theTradeDesk

ROGERS
Sports & Media

MiQ

amazon

eyeota

CONNECTED
INTERACTIVE

ENVIRONICS
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Experience with BIA's, Travel and Tourism

BIA's

TOURISM

TRAVEL



Helping BIAs and Tourism groups understand the impact of COVID-19

Benefits for BIA Consortium

- Holistic view of all BIAs in a metro area vs others across the country
- Compare recovery vs other similar markets nationally
- Determine programming that increases traffic to neighbouring BIAs
- Identify BIAs with the most commonalities to understand how placement events can compliment or cannibalize visitors
- Understand visitor preferences to determine total Toronto BIA opportunities
- Understand visitors' digital behaviour to promote and support the larger metro area's events

Benefits for Individual BIAs

- Understand visitor traffic patterns to their BIA's
- Understand visitor profiles, where they are coming from, when they are visiting and the types in interest they have
- Compare event traffic versus full year traffic to determine event success
- Compare their visitors to neighbouring BIAs to determine if they are competing for the same visitor profile

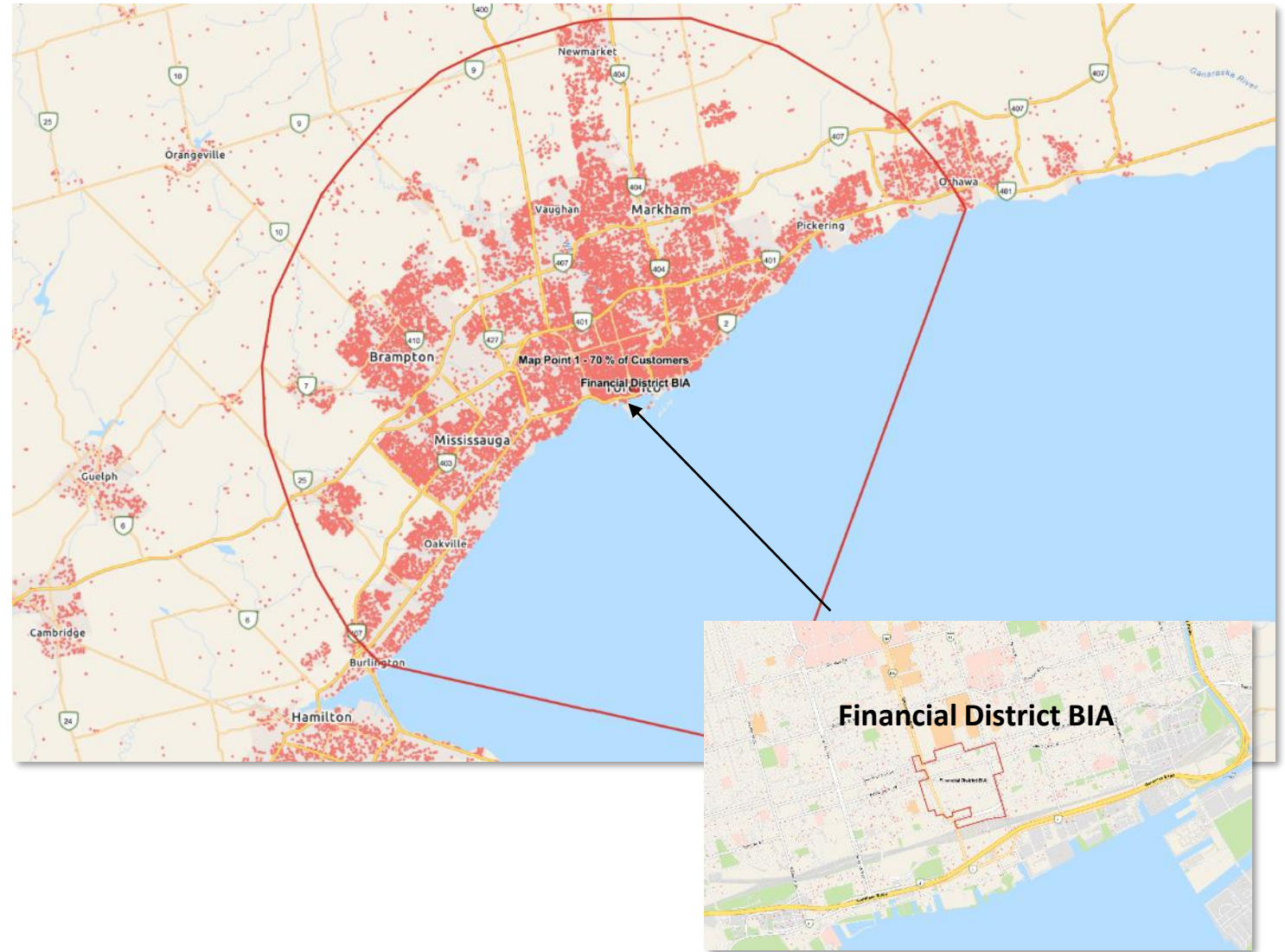


MobileScapes

Leveraging Mobile
Movement Data to
Understand Changing
Canadian Consumer
Behaviours

Privacy compliant, anonymized, permission-based data collected from location-enabled apps on mobile devices

- Unique, persistent, anonymous device ID, along with a day, time and location for each observation
- Researchers can “observe” Canadian devices within a defined area such as a store, public square or on a roadway for a given date and time range



How has COVID-19 Impacted BIAs and surrounding areas? And how does this differ regionally?

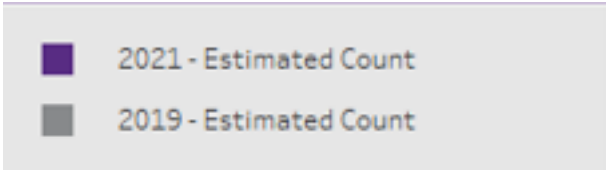
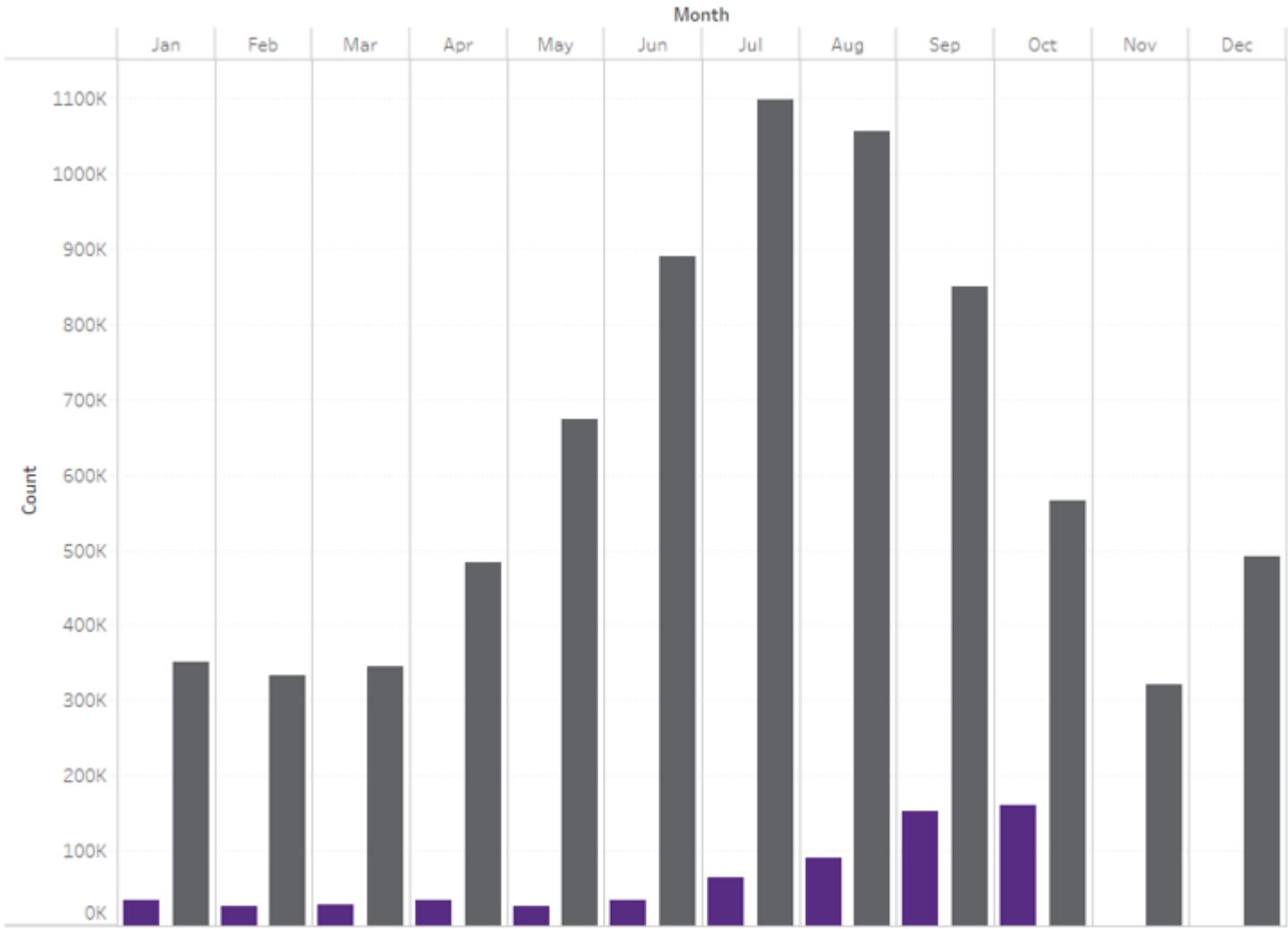
International Visitor Traffic to Canada 2019 vs 2021

2019

Total Trips	Total Nights
7,456,351	118,287,116

2021

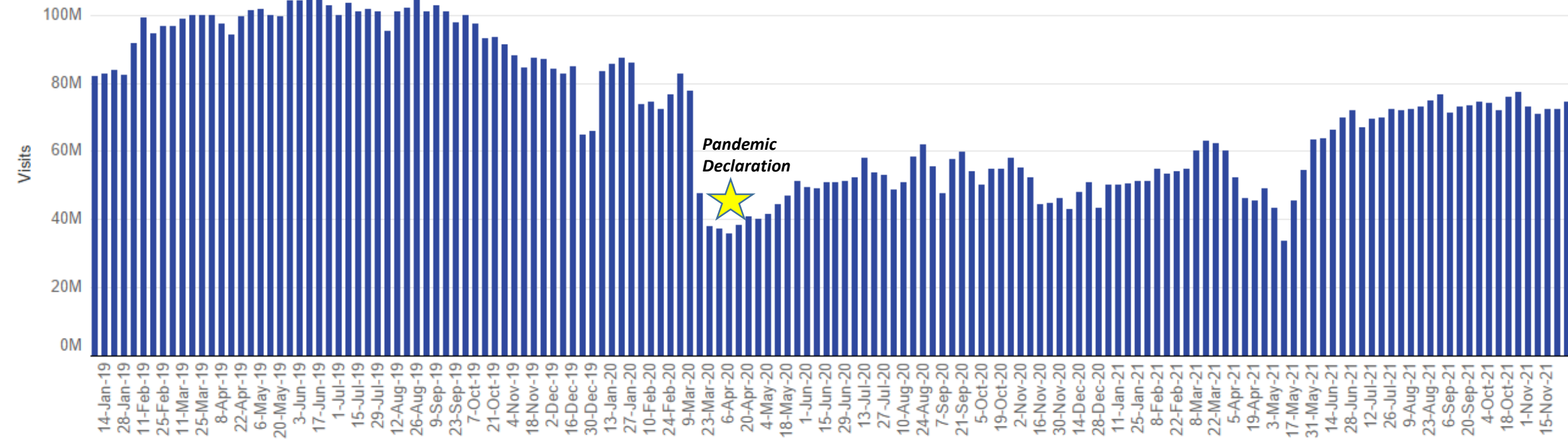
Total Trips	Total Nights
651,174	12,277,670



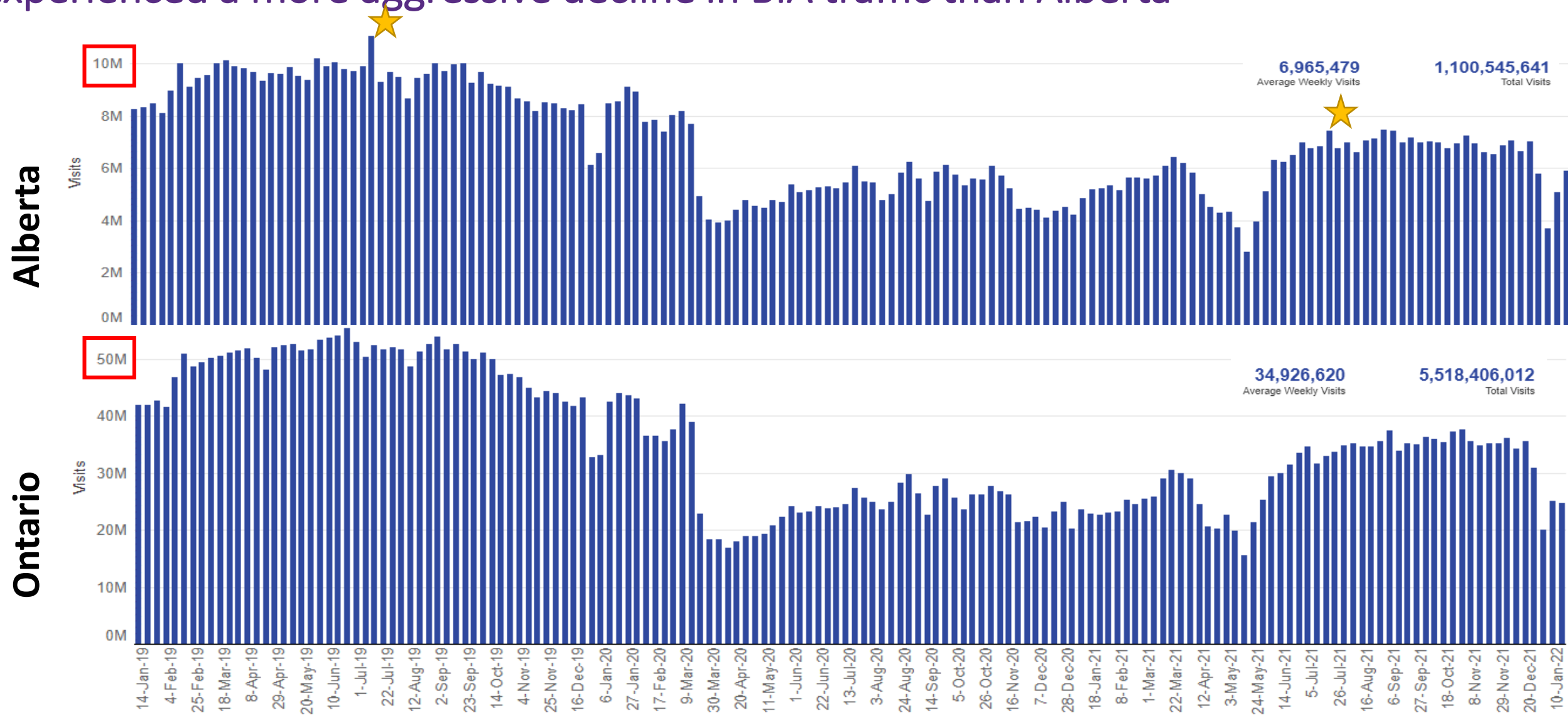
Visits to BIAs decreased by 42% in 2020 and 35% in 2021 when compared to 2019

71,280,064
Average Weekly Visits

10,834,569,684
Total Visits



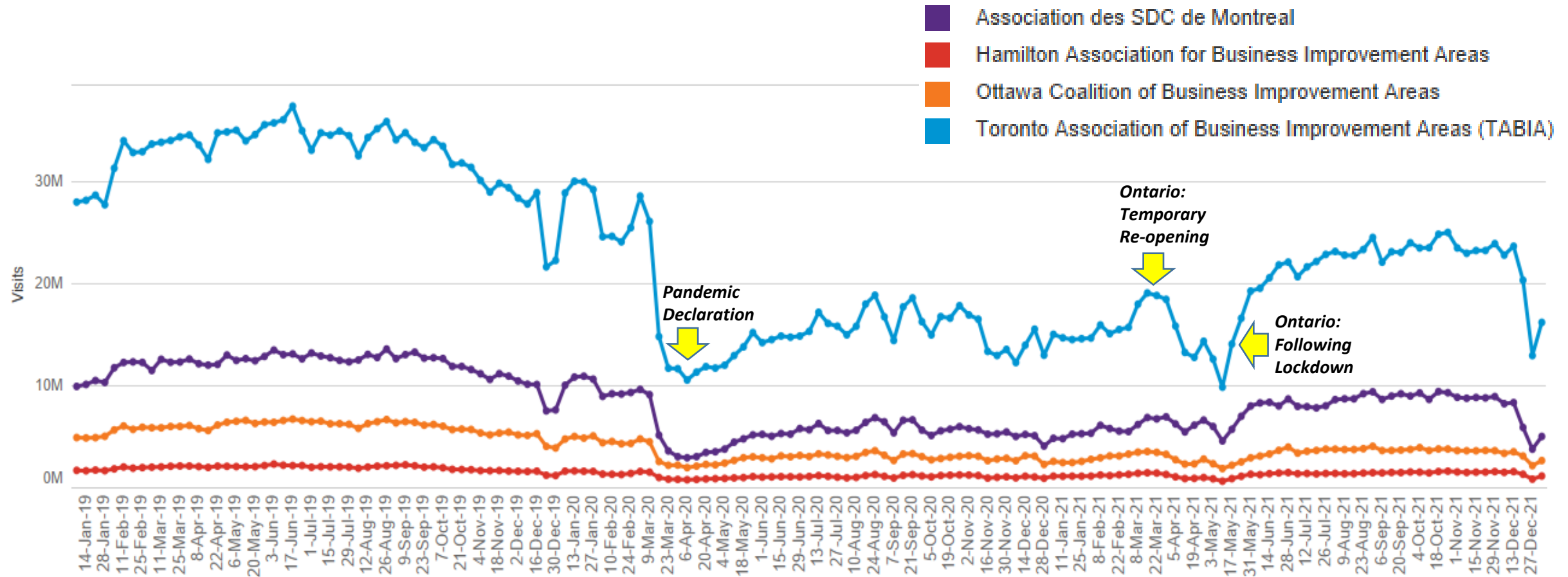
Both Alberta and Ontario follow a similar trend to Canada, however, Ontario experienced a more aggressive decline in BIA traffic than Alberta



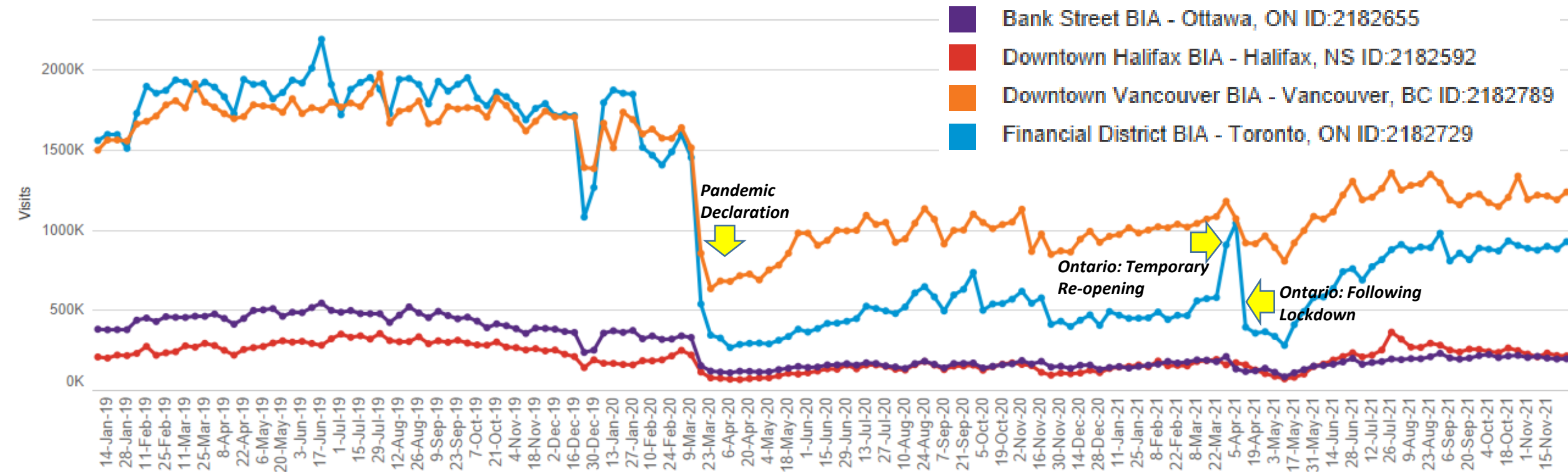
Ontario BIA visitation represents 50% of total BIA visits nationally. In 2021, Both Alberta and Ontario are showing signs of rebounding with more visits than despite continued restrictions.

		Avg Weekly Visits	Total Visits	% Change Total Visits vs. 2019
Canada	2019	94.1 M	4.9 B	
	2020	54.7 M	2.8 B	-42%
	2021	62.4 M	3.2 B	-35%
Alberta	2019	9.2 M	479 M	
	2020	5.6 M	294 M	-39%
	2021	6.1 M	316 M	-34%
Ontario	2019	48.6 M	2.5 B	
	2020	26.7 M	1.4 B	-45%
	2021	29.9 M	1.6 B	-36%

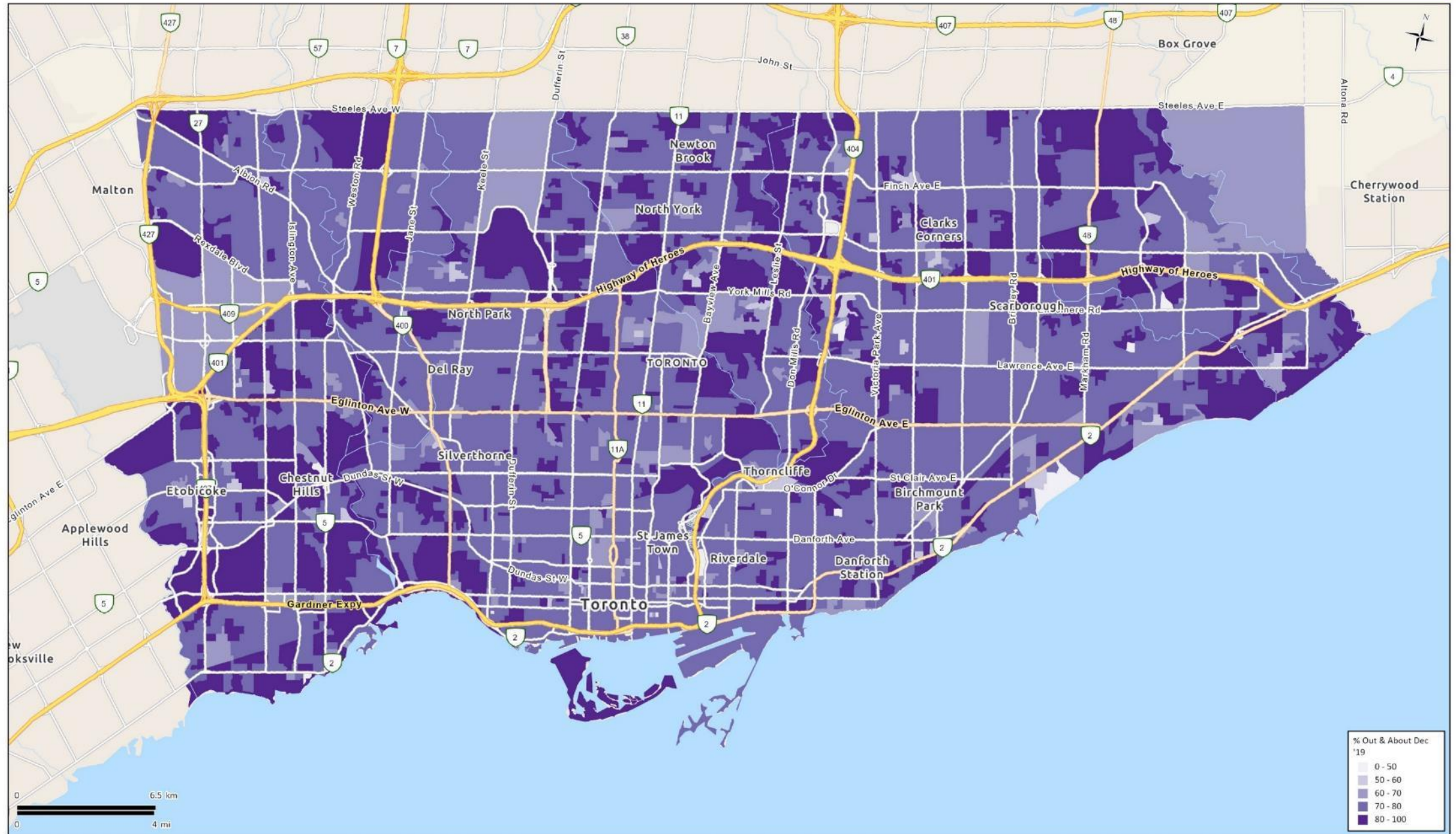
When looking at specific BIA associations, not all are rebounding to 2019 traffic at the same rate.



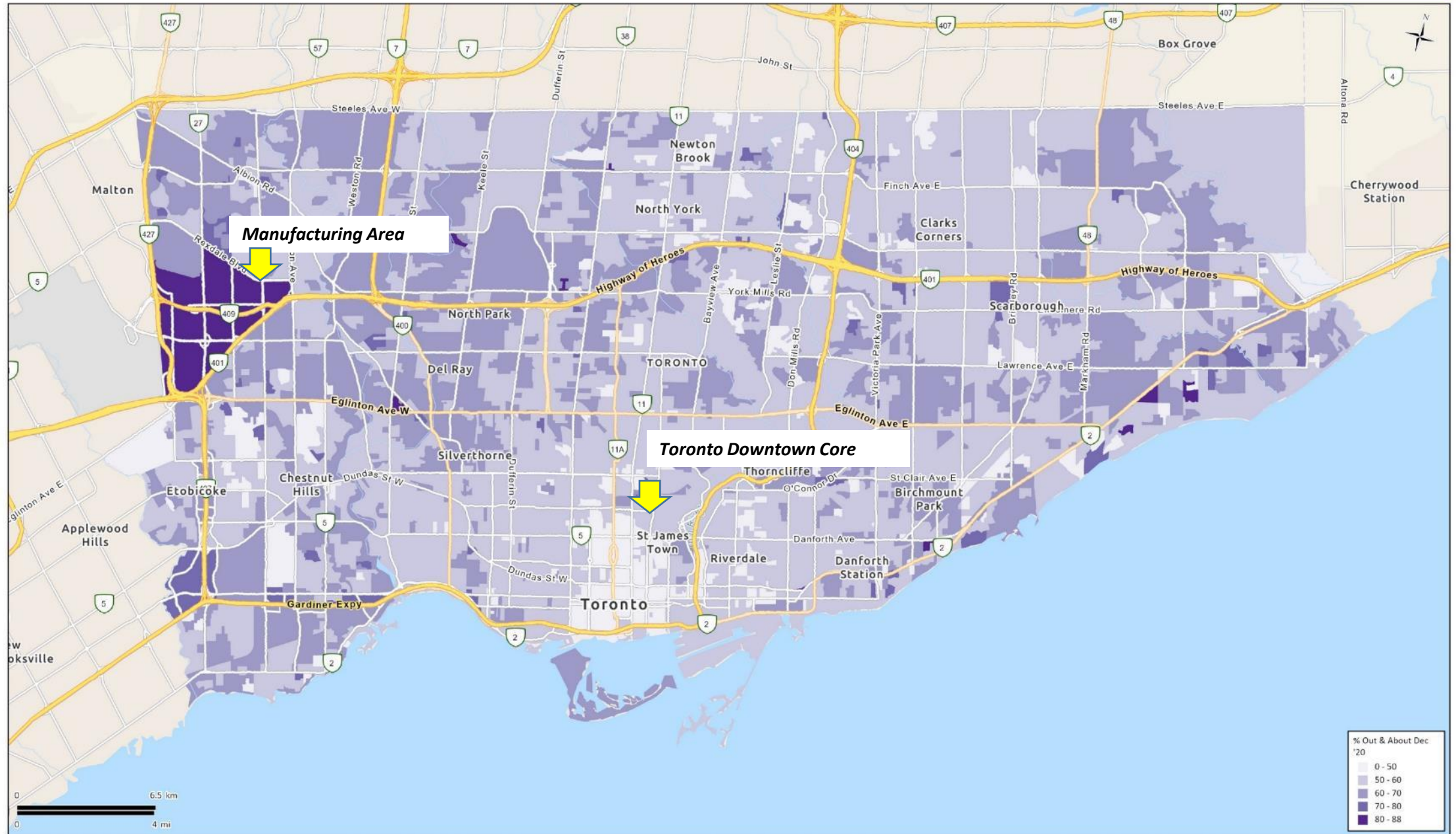
These BIAs experienced a larger decrease than the national average. Downtown Halifax and Downtown Vancouver BIAs experienced more visits in 2021 than 2020.



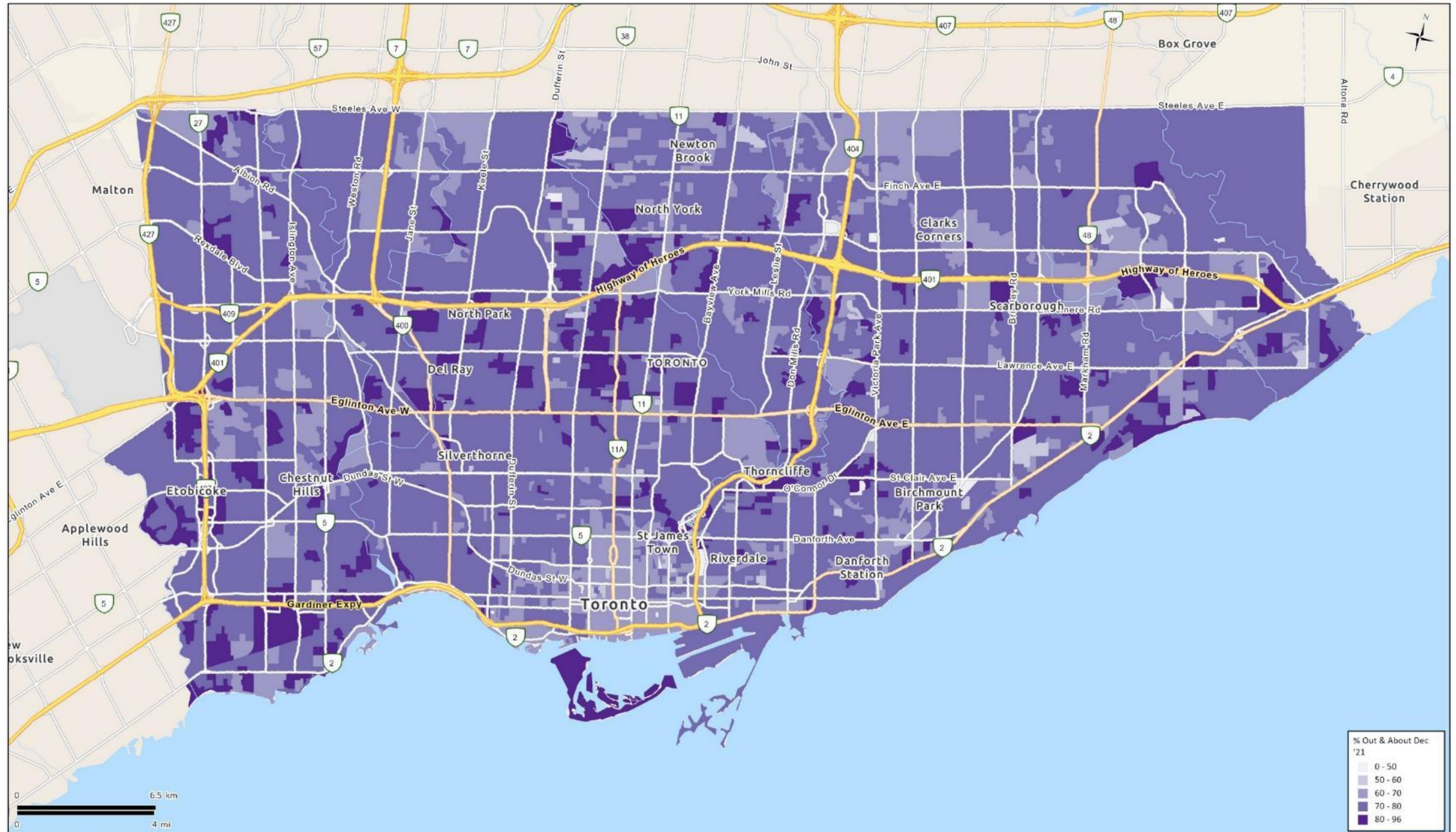
Toronto - % of Population Out & About – Dec 2019



Toronto - % of Population Out & About – Dec 2020

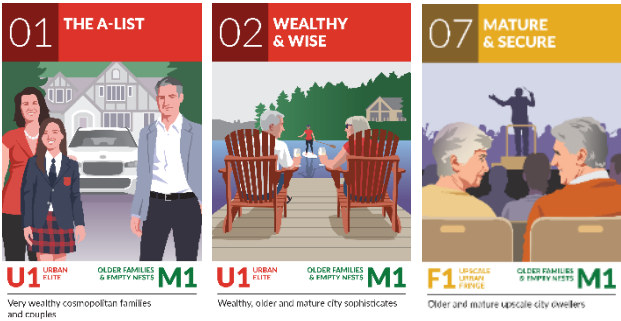


Toronto - % of Population Out & About – Dec 2021

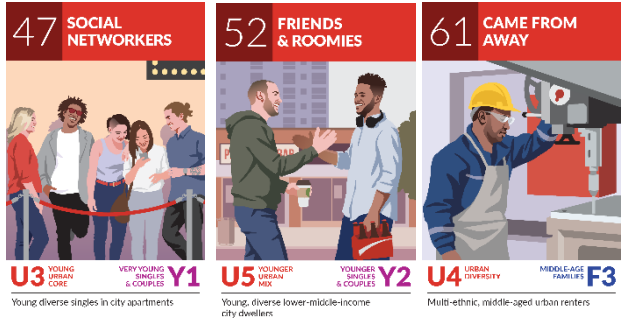


Wealthy Mature Families, Downtown Urban Singles and Couples, and Midscale Diverse Families are most likely to be leaving their homes in 2021.

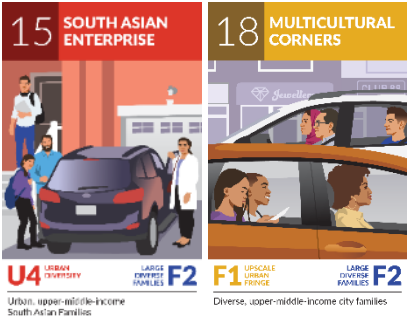
Wealthy Mature Families & Empty Nesters



Downscale Young Urban Singles & Couples



Midscale Diverse Large Families

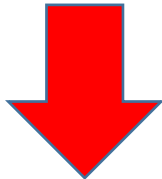


Parks or Greenspace

28% of population



25% of Population

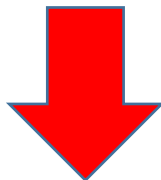


27% of population



Commercial

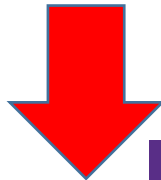
48% of Population



57% of Population



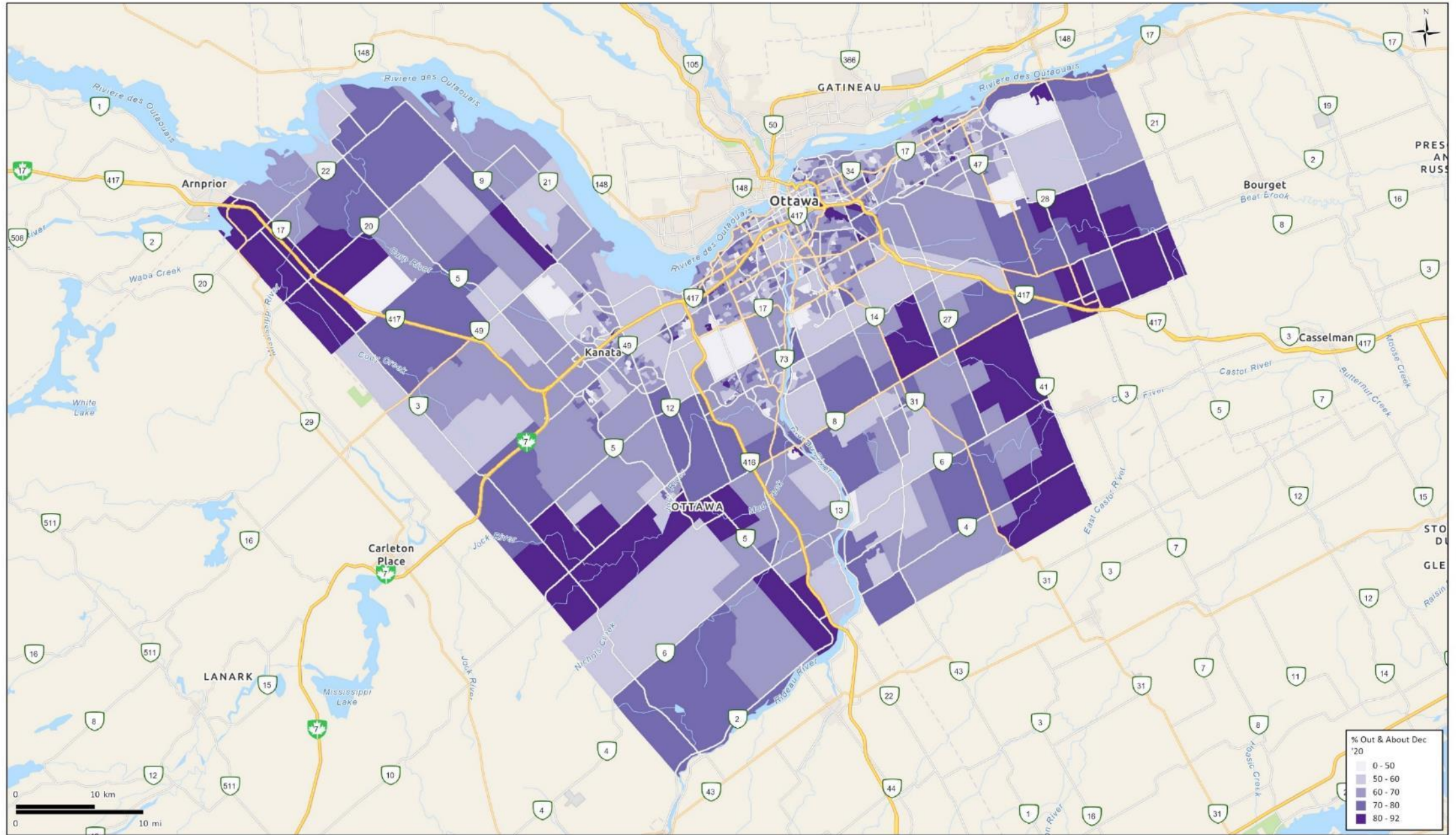
47% of population



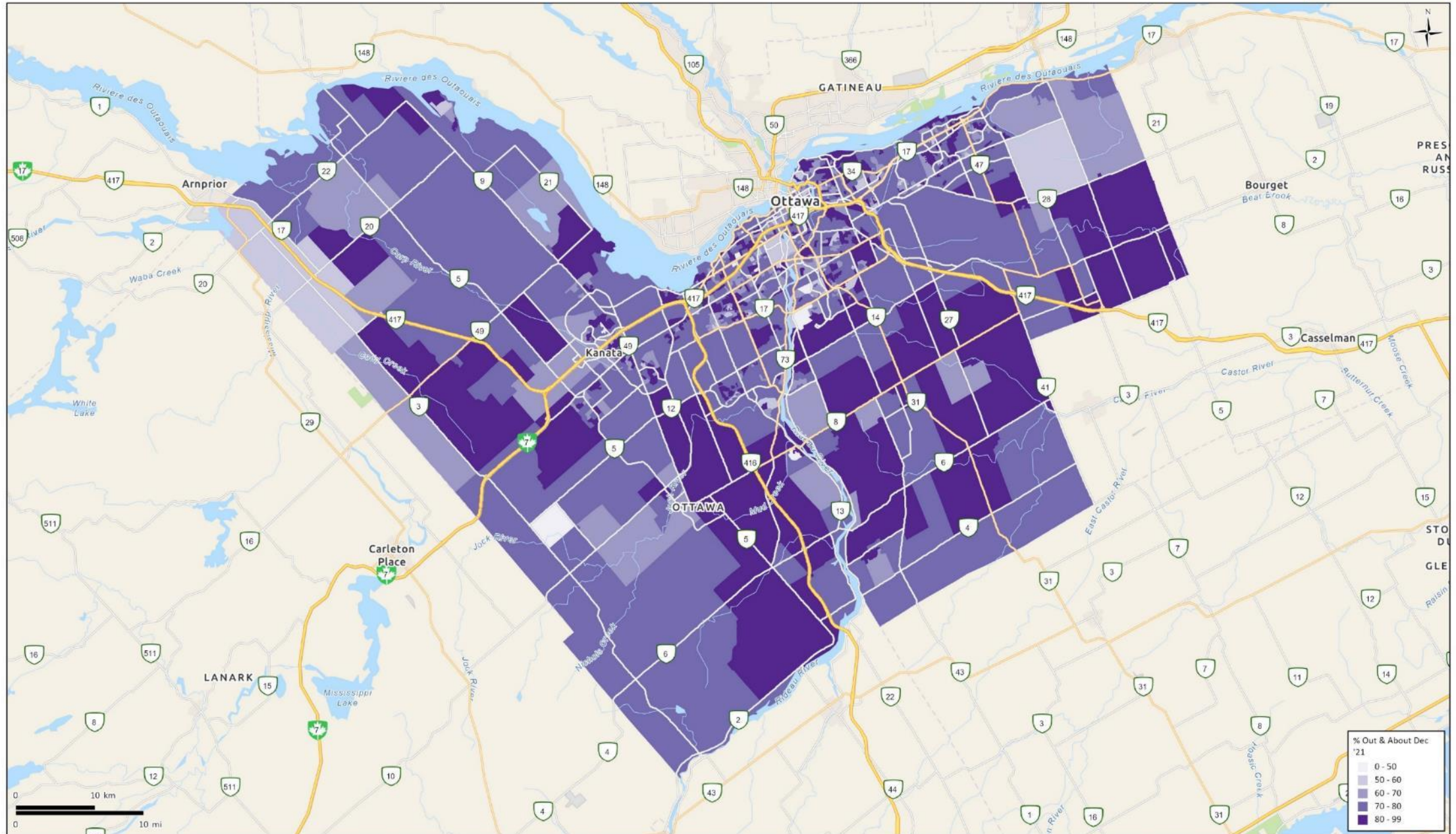
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Ottawa - % of Population Out & About – Dec 2020



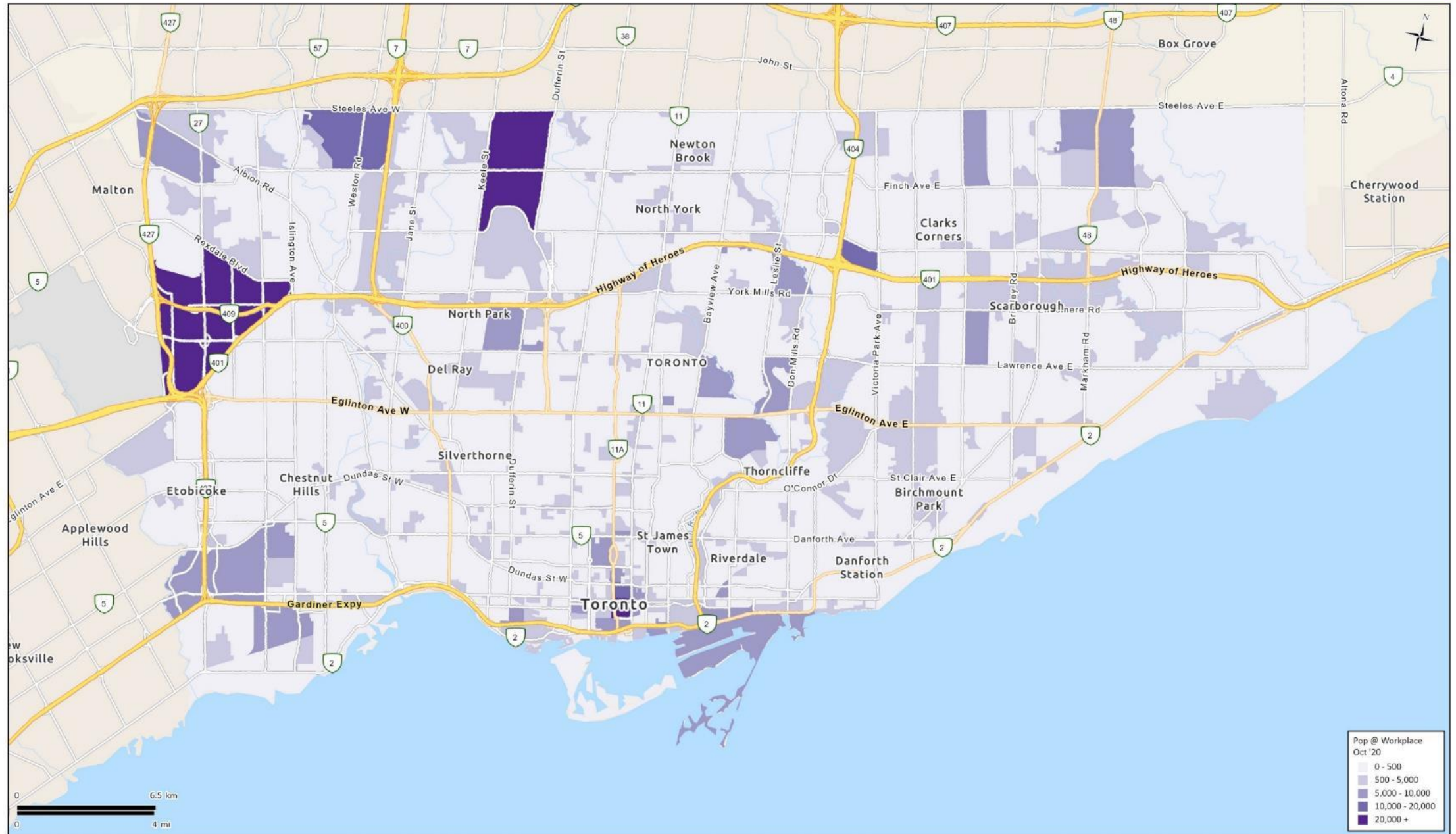
Ottawa - % of Population Out & About – Dec 2021



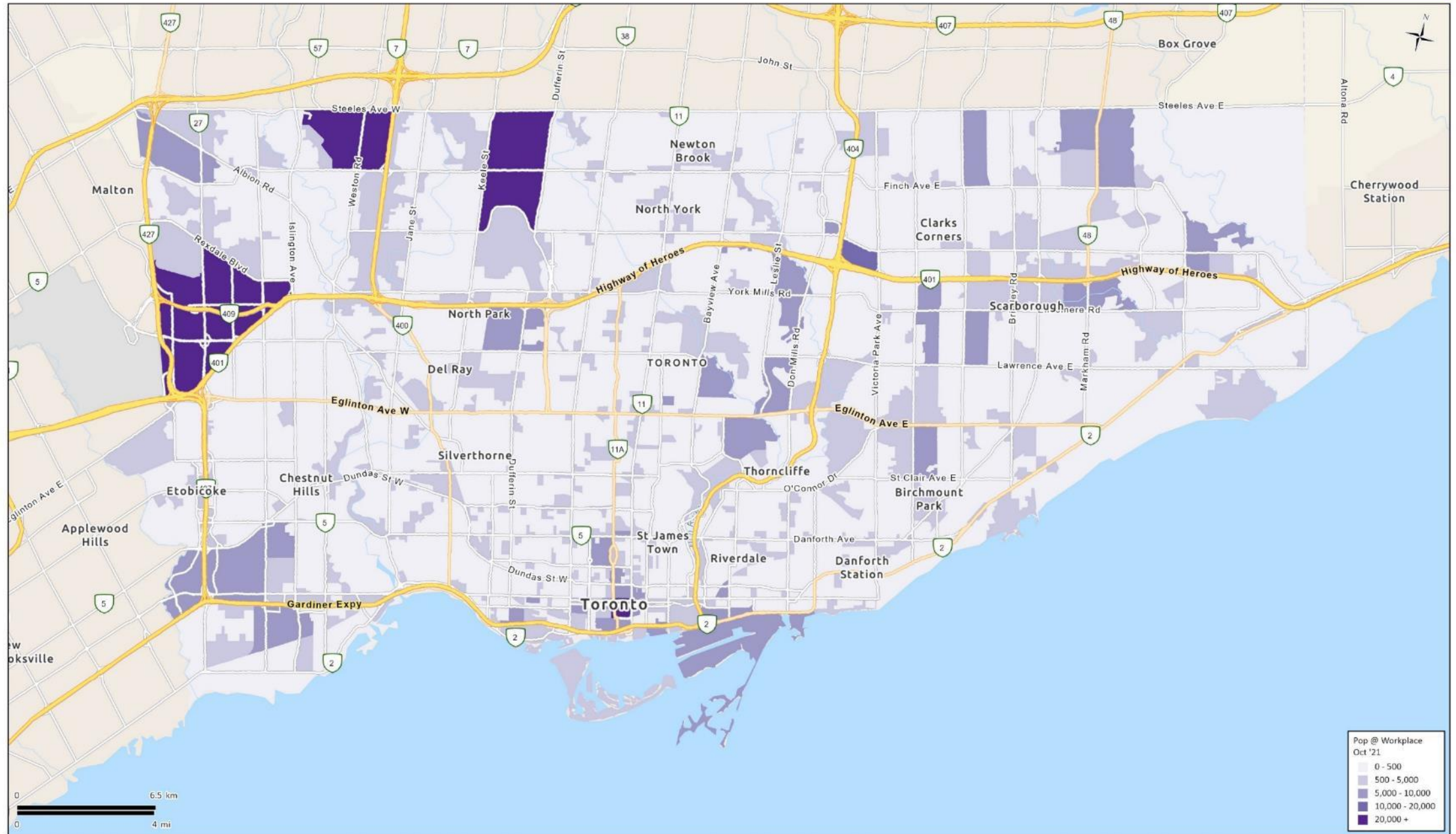
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Toronto – Population at Workplace – Oct 2020



Toronto – Population at Workplace – Oct 2021



Summary & Applications

Summary

- Significant decline in local & tourist traffic affecting BIAs in 2020 with mixed recovery story in 2021 across Canada.
- In particular, Toronto's Financial District and Ottawa's Bank St did not see the recovery seen elsewhere – ie: Halifax and Vancouver downtowns and across Toronto as a whole (TABIA)
- 2021 saw a resurgence in willingness of people leaving their homes compared to the drop seen in 2020. But this recovery still not at 2019 levels.
- In Toronto, the reasons for leaving home vary by lifestyle/lifestage, with wealthier mature families visiting parks and greenspaces, and downscale young urban singles and couples visiting commercial centres at higher rates than other household types.
- Similar story for workplace bound traffic with 2021 levels still not back to 2019 magnitude – with ensuing affects on BIAs

Applications

- Navigate changing the visitor/consumer landscape through unprecedented change and monitor who is visiting your BIA at higher rates to focus outreach on these populations
- Evaluate location performance and build market share
- Evaluate real estate decisions: relocations, expansions, competitive impacts
- Evaluate marketing decisions: media preferences by lifestyle to market effectively

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Questions?



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