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

Stephanie McIsaac
SVP & Practice Leader - Retail, Real Estate and Travel
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

Digital, Online, and Social

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Experience with BIA’s, Travel and Tourism

BIAs

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

<table>
<thead>
<tr>
<th>Month</th>
<th>2019 Total Trips</th>
<th>2019 Total Nights</th>
<th>2021 Total Trips</th>
<th>2021 Total Nights</th>
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<td>Jan</td>
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Visits to BIAs decreased by 42% in 2020 and 35% in 2021 when compared to 2019
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.

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

Manufacturing Area

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

- **Parks or Greenspace**
  - 28% of population
  - 25% of population
  - 27% of population

- **Commercial**
  - 48% of Population
  - 57% of Population
  - 47% of population
Ottawa - % of Population Out & About – Dec 2019
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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