the glebe

The Glebe BIA's service area captures a young, upper-middle class population that enjoys going to restaurants, live performing arts and shopping. Those living in this area are very educated with more than 75% holding a college diploma or higher. Their high education levels have led them into white collar and public service occupations where they earn average household incomes of $108K. About half of the households in this region are single earner households meaning they are likely to have a fair amount of discretionary income. Households in the Glebe BIA's service area spend an average of $90K, slightly lower than their average income level and tend to spend more, as a proportion of their annual expenditure, on food purchased from restaurants, books, live performing arts, recreation services such as bowling, and clothing. The Glebe BIA's service area hosts 57,965 people during work hours with above average proportion of the daytime population being at work.

KEY FACTS

POPULATION
59,549

DAYTIME POPULATION
57,965

57%
UNDER THE AGE OF 40

48%
LIVE IN ONE PERSON HOUSEHOLDS

23%
BELONG TO A VISIBLE MINORITY

$108K
AVERAGE HOUSEHOLD INCOME

71%
LIVE IN APARTMENTS

67%
ARE RENTERS

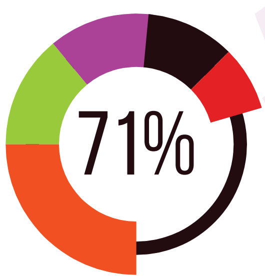
30%
WALK TO WORK
THIS IS MORE THAN THREE TIMES THE AVERAGE*

64%
HOLD A UNIVERISTY EDUCATION

SPEND HIGHLIGHTS

AGGREGATE EXPENDITURE
$2.9 BILLION

$90K
AVERAGE HOUSEHOLD EXPENDITURE



TOP 5 SPEND CATEGORIES
- 25% FOOD
- 14% HOUSEHOLD OPERATION
- 13% RECREATION
- 11% CLOTHING
- 8% HEALTH CARE

$2,890
SPENT ON FOOD FROM RETAURANTS

$2,943
SPENT ON CLOTHING (MENS & WOMENS)

$172
SPENT ON ART, ANTIQUES AND DECORATIVE WARE

$147
SPENT ON LAUNDRY AND DRY-CLEANING SERVICES

$112
SPENT ON LIVE PERFORMING ARTS

$1,275
SPENT ON ALCOHOLIC BEVERAGES

ENVIRONICS ANALYTICS

Notes: Service Area is defined as a 2km radius from the centre of the Glebe BIA Boundary; Dollars quoted reflect yearly average household expenditure unless otherwise stated; Top 5 Spend Categories excludes spend on shelter, transportation and additional expenses; *Compared to the city of Ottawa (CSD). Source: Environics Analytics, DemoStats 2016, DaytimePop 2016, HouseholdSpend 2016

USING THESE SEGMENTS TO GROW YOUR BUSINESS

HOW BUSINESS IMPROVEMENT AREAS CAN BENEFIT

the glebe

Help your local businesses **understand** who their **core customers are,** how they make decisions and **how they can engage them**

Craft more **relevant messaging** and communications, with more insight into mindsets

Anticipate customer needs and capabilities to **create a more enjoyable experience** for them – and you

Understand what **media** your customers use, so you can buy more effective advertising, on **social media or traditional** mass channels

Expand your reach beyond your service area – know the areas for productive marketing opportunities

Tweak your advertising and messaging so it **catches their attention** and shows the value you bring

Identify opportunities for **new events** and programs (such as festivals, concerts, etc.)

Align partnerships and sponsorships for local venues and charity events, so they are more relevant to your target customers

Glebe BIA
2016 Survey of Ottawa Residents
July 28, 2016

Table of contents

Executive summary

- Glebe is **the top-of-mind destination** for shopping, dining and entertainment in Ottawa, on par with Centretown and well ahead of the next most commonly mentioned neighbourhoods, Byward Market, Kanata and Westboro. However, **Westboro is seen as the Glebe's closest competitor**, in terms of the similarity of its offerings.
- Not only is Glebe top-of-mind, it is also a popular destination to visit. **Half (50%) of Ottawa residents report having been there in the past month**, rising to three-quarters of those living in the core (i.e., closest to the Glebe). Among residents who have visited in the past year, there is a substantial group of between one-fifth and one-quarter who shop or dine in the area on a regular basis (at least monthly). These levels are similar for stores and restaurants at Lansdowne and elsewhere in the Glebe, suggesting that both are similarly popular draws.
- **Overall, residents hold largely positive perceptions of the Glebe**. Its strengths are considered to be its variety of unique and trusted stores and restaurants and its lively and vibrant atmosphere, with a strong neighbourhood feel. It receives good ratings for cleanliness/maintenance, indicating that this is not currently an issue.
- **The key barrier to growth for the Glebe is weak perceptions of accessibility**. Residents consider "easy and convenient to get to" among the most important aspects of a shopping/dining destination, and give the Glebe particularly low ratings on this attribute. Lack of parking and congestion are identified by residents as main areas for improvement and are also the main concern for residents who say they are unlikely to visit the Glebe in the next six months.
- Another relatively common perception of the Glebe is that it is expensive and upscale. However, it is unclear whether this represents a barrier or an opportunity, which is likely dependent on each individual and also on how specifically the Glebe is positioned.
- The Glebe is a **bigger draw for core residents who are in close proximity to the Glebe, as well as younger residents (under 40)**. These groups are more likely to be recent visitors and to frequently shop and dine in the neighbourhood, as well as to anticipate that they will visit (again) within the next six months. In turn, both groups also tend to hold more positive perceptions of the Glebe, particularly about convenience (core residents) and vibrancy (younger residents).

Research overview and methodology

Research overview

The objective of this research was to measure Ottawa residents' perceptions of and experiences visiting the Glebe. In particular, the research was designed to provide insight into the Glebe's competitive advantages and disadvantages relative to other city destinations that also offer shopping, dining and entertainment. The information will be used to inform marketing efforts designed to attract people to the area.

Methodology

This report presents the findings of a telephone survey conducted with a representative sample of 501 City of Ottawa residents (aged 18 or older) from July 5 to 13, 2016. Interviews were completed with both landline (80%) and cell phone (20%) sample. The margin of error for a sample of 501 is plus or minus 4.4 percentage points (at the 95% confidence level). Readers are cautioned that margins of error are larger for subsamples of the population (e.g., regions, age groups).

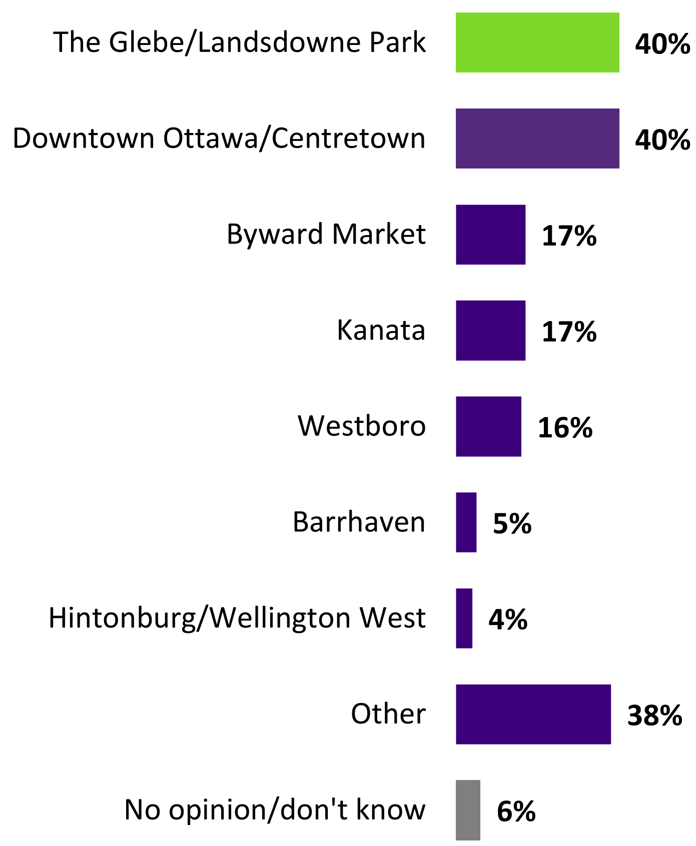
The sampling method was designed to complete 500 interviews within households randomly selected across the City. Quotas were set by gender and location, the latter comprised of three regions based on proximity to the Glebe: core (which includes the Glebe), the inner suburbs and the outer suburbs (definitions are provided in the Profile of respondents). The results are statistically weighted to ensure the final sample reflects the regional and demographic composition of the Ottawa population according to the most recently available Census information (2011).

In this report, results are expressed as percentages unless otherwise noted. Results may not add to 100% due to rounding or multiple responses.

Ottawa destinations

The Glebe/Lansdowne Park and Downtown Ottawa are considered the best neighbourhoods for shopping, restaurants and entertainment

Best neighbourhoods for shopping, restaurants and entertainment



Four in ten name the Glebe/Lansdowne Park as the best neighbourhood for shopping, restaurants and entertainment in Ottawa, tied with mentions of Centretown.

As one would expect, this varies considerably by location. The Glebe is by far the most widely named neighbourhood by core residents (61%), surpassing mentions of Centretown (37%) and Westboro (28%).

In the inner suburbs, Glebe (41%) and Centretown (40%) are essentially tied in popularity. In the outer suburbs, residents are most likely to identify Centretown (41%), followed by Kanata (35%) and the Glebe (30%).

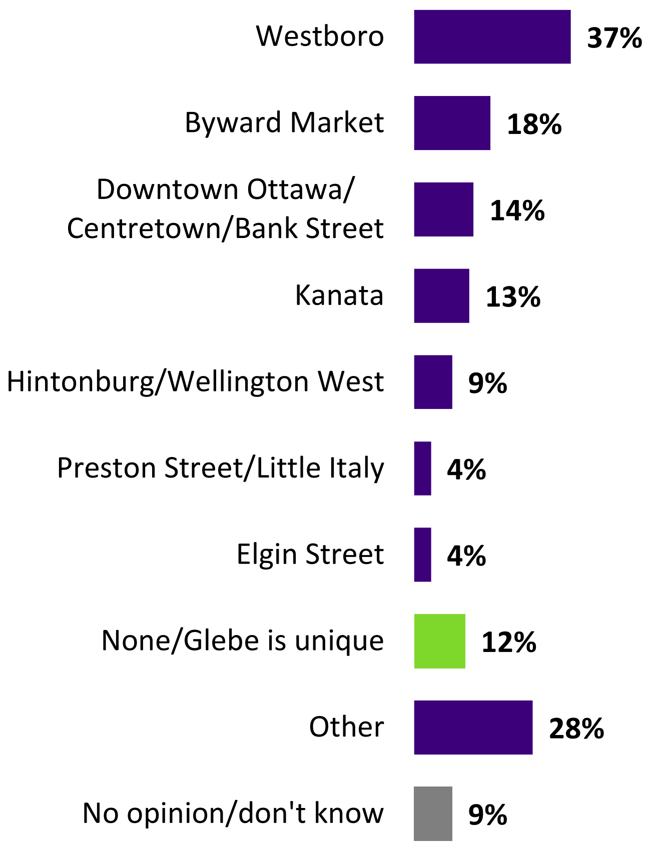
The Glebe is also more widely mentioned by younger residents (49% of those aged 18-39 compared to 35% of those aged 40 and older).

Other destinations each with fewer than 4% of mentions include: Nepean, Old Ottawa South, Orleans, LeBreton Flats, Bayshore, Elgin Street, Preston Street/Little Italy, Canadian Tire Centre, St. Laurent, Sandy Hill, Chinatown, and New Edinburgh/Beechwood.

Q.1 *What neighbourhoods in Ottawa come to mind as the best for shopping, restaurants and entertainment such as sports events, concerts and festivals? (UNPROMPTED)*

Residents feel Westboro is the neighbourhood that offers the most similar experience to the Glebe

Other neighbourhoods for shopping, restaurants and entertainment similar to the Glebe



When asked which neighbourhood in Ottawa offers the shopping, dining and entertainment experience *most similar to* the Glebe, residents are most likely to mention Westboro (37%).

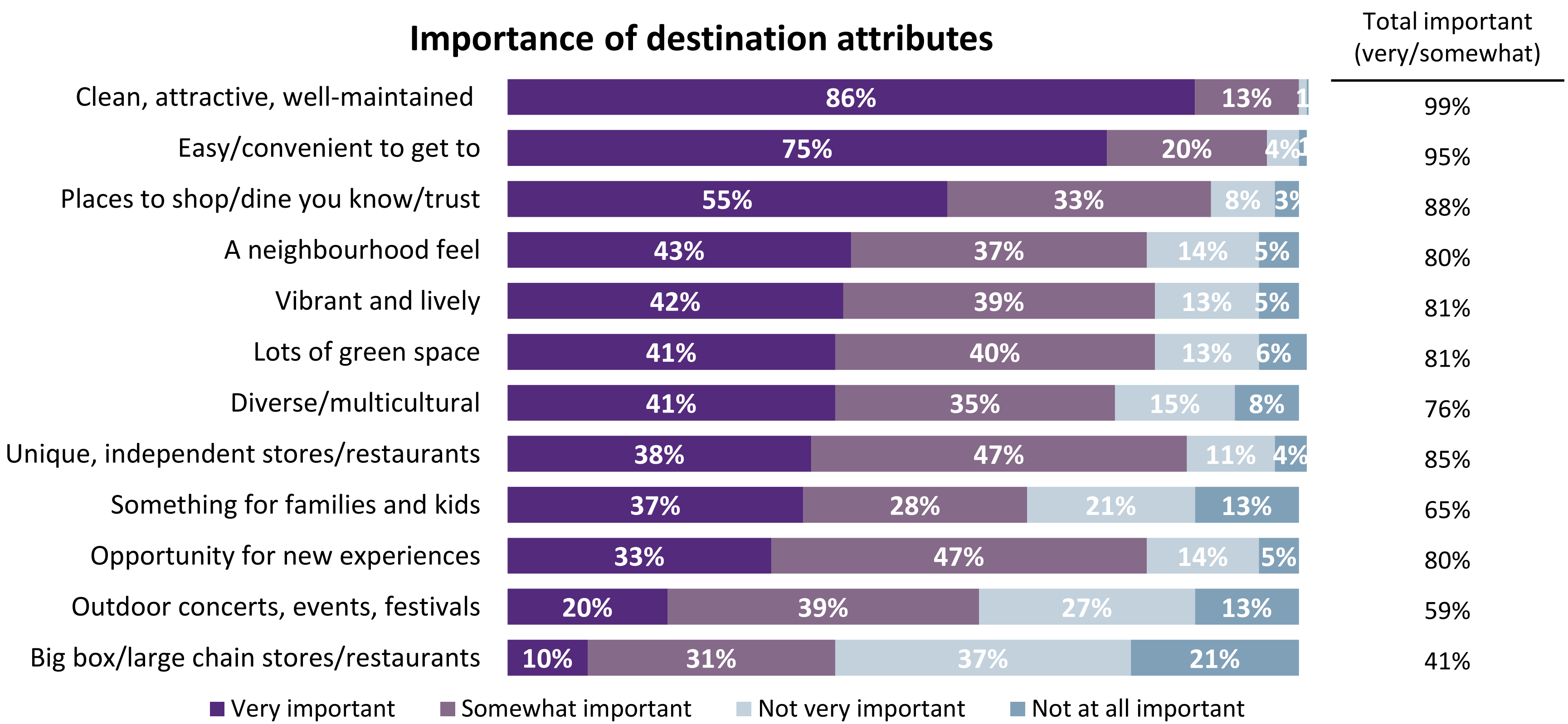
Again, this varies by location. Mentions of Westboro (56%), Byward Market (32%) and Centretown (21%) are particularly high in the core. Suburban residents are more likely than core residents to mention Kanata (16%) or to say that "there is no comparable neighbourhood, because the Glebe is unique" (14%).

The results also vary by household income. Comparing Westboro as most similar in its offerings to the Glebe jumps considerably from just one in ten (9%) of those with incomes under $50K to half (52%) of those over $120K. Mentions of the Byward Market and Centretown are most common among those in the middle income bracket ($50-$120K). Residents in the lowest income bracket (under $50K) are more likely than others to mention Bayshore Shopping Centre (11%) or to have no opinion.

Comparing Westboro to the Glebe is also more common among residents aged 44-59 (44%) and those with a university education (45%).

Q.10 What other Ottawa neighbourhoods, if any, would you consider to offer the same type of shopping, dining and entertainment experience as what you could expect of the Glebe? (UNPROMPTED)

Residents value destinations that are well-maintained and convenient, above other attributes

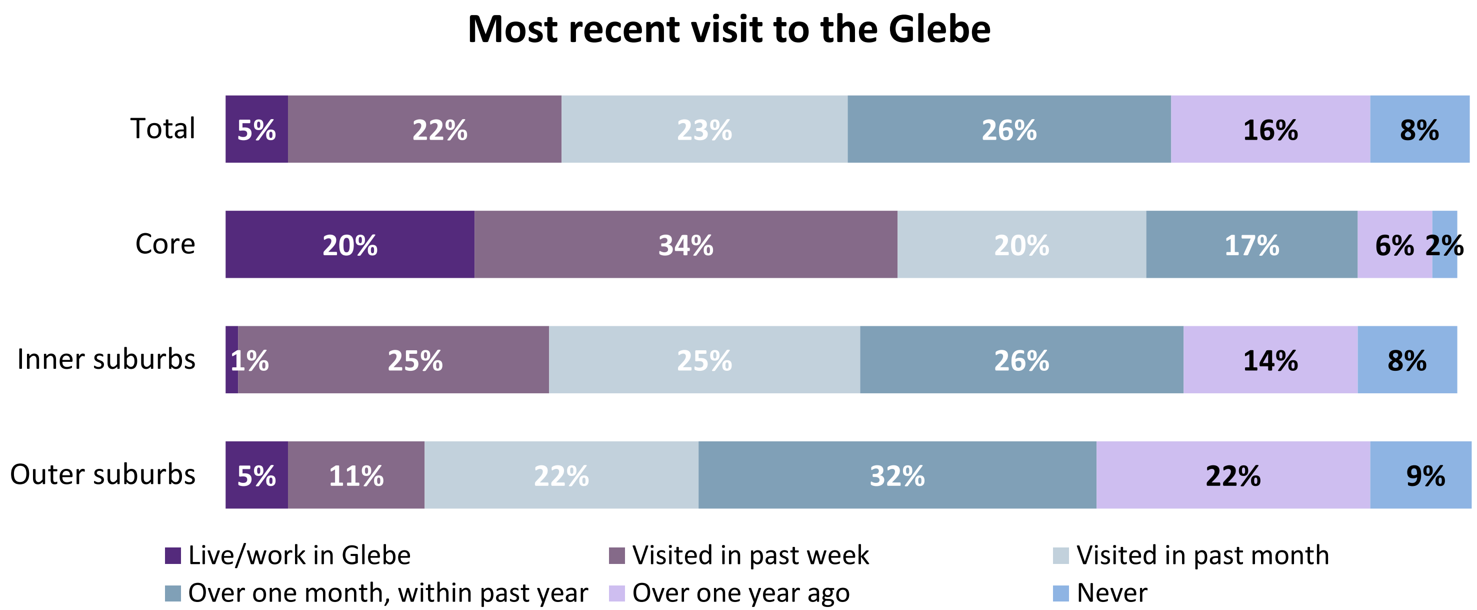


When thinking about where they like to go to shop, dine and for entertainment, residents place the greatest importance on area maintenance (86% very important) and ease of access (75%), followed by a sense of familiarity with or trust in the area's stores and restaurants (55%). The ranking of attributes is largely similar across subgroups, with a few exceptions. Unique, independent shopping and dining options are most highly valued by core residents (47%) and least so by those in the inner suburbs (33%), which is partly reflected in where they choose to live. Younger residents place greater importance on the opportunity for new experiences (44%). Residents in the lowest income bracket are more inclined than others to value a diverse and multicultural destination (60%), while those in the highest income bracket place greater importance on a vibrant/lively destination (52%) with stores they trust (65%).

Q.2 *Thinking of the places that you like to go to shop, dine or for entertainment, how important to you are the following elements? Is it very important, somewhat important, not very important or not at all important to you that the area [FIRST ITEM]? What about [REMAINING ITEMS]?*

Experiences with the Glebe

Glebe is a popular destination, with half of Ottawa residents who claim to have been to the area in the past month

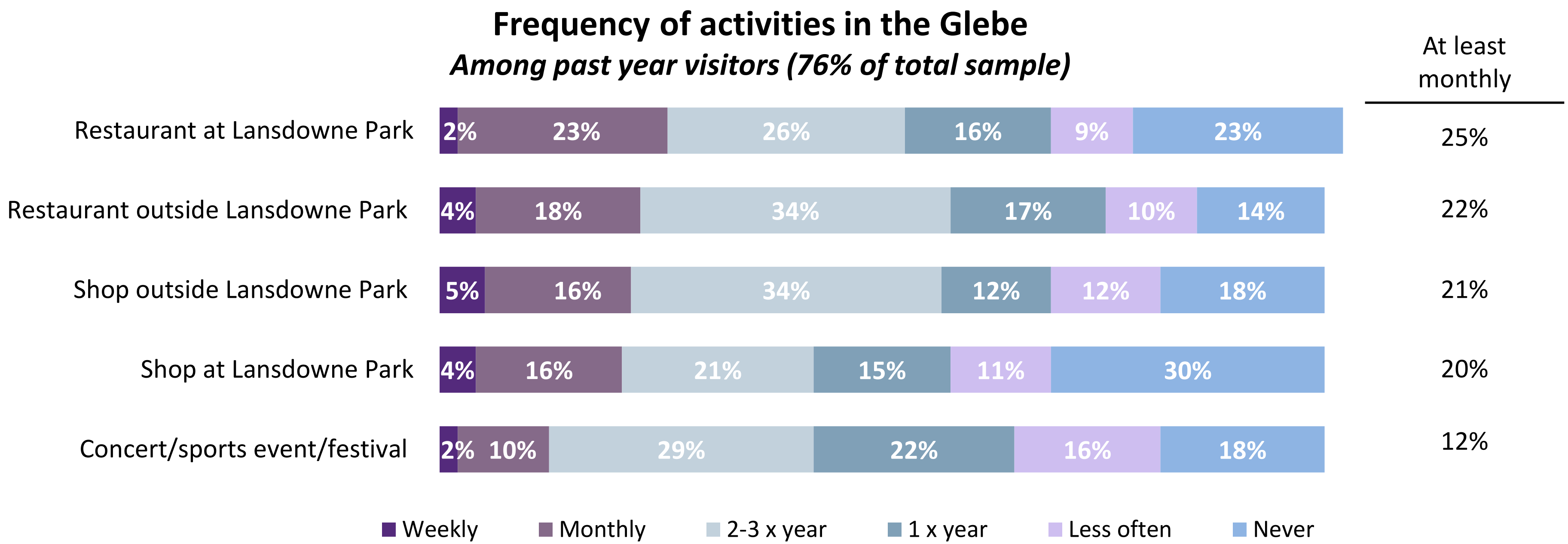


The majority (76%) of Ottawa residents say they have been to the Glebe in the past year, including half (50%) who have been in the past month (five percent of whom live or work in the Glebe). Reported visits are linked to proximity: core residents are most likely to have been to the Glebe in the past month (74%), followed by those living in the inner suburbs (52%), while this is least likely among residents of the outer suburbs (38%).

Recent visits (past month) to the Glebe are higher among younger residents (61% of those aged 18-39) and decline with age (to 35% of those aged 60+). Men (57%) and residents with a university education (58%) are also more likely to say they have visited the Glebe in the past month. Reported visits do not vary significantly by household income.

Q.4 Before I continue, do you currently live or work in the Glebe?
Q.5 (IF NO AT Q.4) When was your most recent visit to the Glebe, for shopping, dining or for entertainment such as a concert, sports event or festival?

Between one-fifth and one-quarter of past year visitors to the Glebe dine or shop there at least monthly



Among Ottawa residents who have been to the Glebe in the past year (76% of the total sample), there is variation in the frequency with which they enjoy shopping and dining in the area. There is a solid core of visitors who report shopping or eating at Landsdowne or in the Glebe at least once a month (ranging between one in five and one in four, depending on the activity); another fifth to a third do so two or three times a year.

Q.8 How often would you say you…?
SUBSAMPLE: (n=359)

Monthly participation in shopping/dining in the Glebe is generally higher among younger residents and those who live in the core

Groups with higher proportions who participate at least monthly in activities in the Glebe *(among past year visitors – 76% of total sample)*

Dine at Lansdowne

18-39 – 37%

Past month Glebe visitors – 34%

Dine elsewhere in Glebe

Core residents – 32%

Past month Glebe visitors – 30%

Shop at Lansdowne

Core residents – 32%

18-39 – 28%

Income <$50K – 41%

Past month Glebe visitors - 28%

Shop elsewhere in Glebe

Core residents – 39%

Past month Glebe visitors – 29%

Attend concerts, events or festivals

Lowest and highest income brackets – 19% each (vs. 8% in $50-120K range)

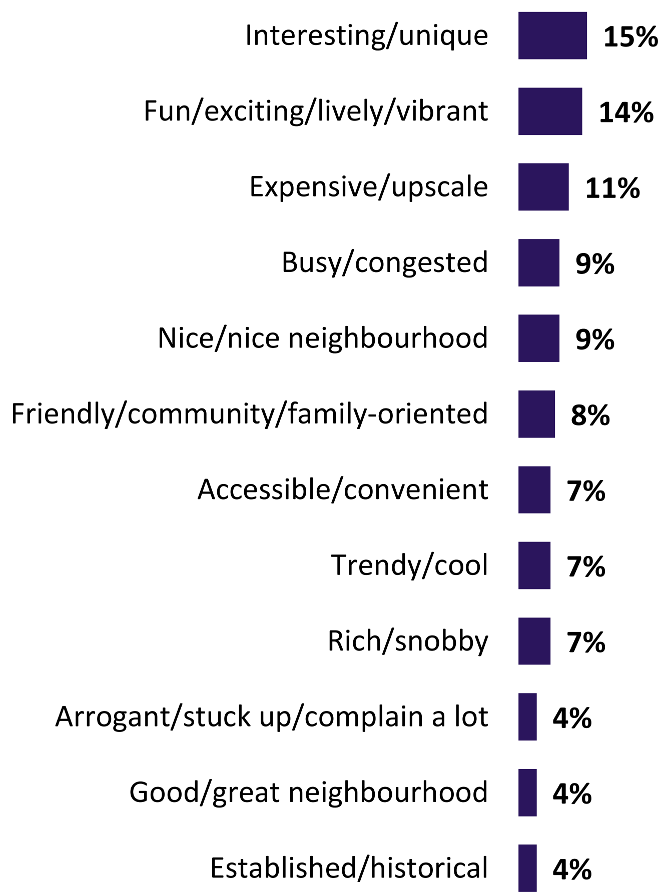
Past month Glebe visitors – 16%

Q.8 How often would you say you…?
SUBSAMPLE: (n=259)

Perceptions of the Glebe

Residents largely describe the Glebe in a positive way, with interesting/unique and fun/exciting/lively among the most common adjectives

Impressions of the Glebe - top mentions (unprompted)



When asked to describe the Glebe in one or two words, Ottawa residents generally use positive adjectives, particularly interesting/unique (15%) and fun/exciting (14%). Less positive impressions (or those that could reflect barriers to visiting) include that the Glebe is expensive/upscale (11%), busy/congested (9%) and rich/snobby (7%).

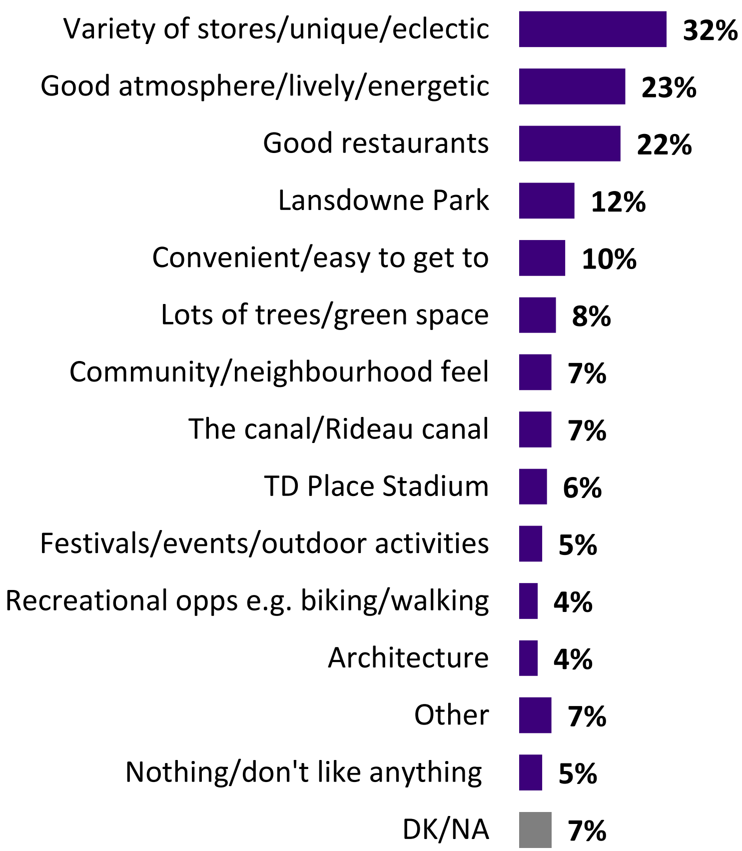
Notably, these impressions do not vary considerably by location or subgroup, with a few exceptions. Core residents are most likely to describe the Glebe as accessible/convenient (15%), as are those in the lowest income bracket (14% with incomes under $50K). In contrast, higher income households (over $50K) are more apt to say the Glebe is expensive/upscale and busy/congested.

Past month and past year visitors are equally likely to describe the Glebe as interesting and fun, and more so than residents who haven't been to the area in the past year. Recent (past month) visitors do stand out from others in describing the Glebe as a nice (12%), trendy (11%) and established (7%) neighbourhood.

Q.3 *The Glebe is a neighbourhood just south of downtown Ottawa. It is bounded by the Queensway to the north, the Rideau Canal to the south and east, and Dows Lake and Preston Street to the west. The Glebe is home to Lansdowne Park and the TD Place Stadium. If you could use one or two words to describe the Glebe, what would they be? (UNPROMPTED)*

Ottawa residents like the Glebe for its range of stores and restaurants and its atmosphere

What like most about the Glebe (unprompted)



When asked what they like most about the Glebe, residents say they appreciate the stores (32%) and restaurants (22%) in the area, as well as the atmosphere (23%). Smaller proportions mention specific destinations including Lansdowne Park, the Rideau Canal, TD Place Stadium and festivals/events. Ten percent or fewer say they like that the Glebe is convenient/easy to get to, has lots of green space and a neighbourhood feel.

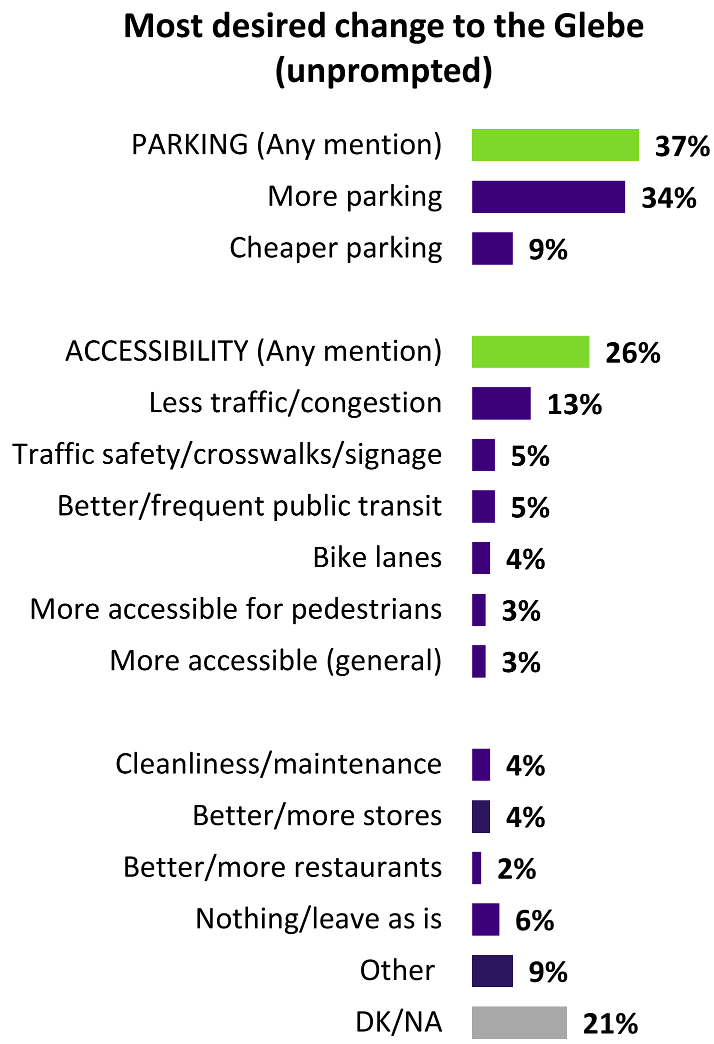
The same attributes (restaurants, stores, atmosphere) fall in the top three regardless of location or demographic subgroup. Not surprisingly, residents from the core (one-fifth of whom live or work in the Glebe) are most likely to point to the Glebe's convenience (29%) and its neighbourhood feel (15%).

The Glebe's restaurants are more widely cited by residents in the middle income bracket (29% of those earning $50-$120K), while mentions of Lansdowne Park are more common among those with lower incomes levels (26% under $50K). Lansdowne Park is also more widely mentioned by those from the inner suburbs (16%) and younger residents (16% aged 18-39).

Recent visitors (past month) are more likely than others to say they like the convenience (15%) and green space (15%) of the Glebe. Visitors in the past year are also more inclined to appreciate Lansdowne Park (15% vs. 1% who have not visited in the past year).

Q.6 What do you like most about [NON-RESIDENTS: n=463 visiting] the Glebe? (UNPROMPTED)

The most desired change to the Glebe is better accessibility, in terms of parking, congestion and other modes of transportation



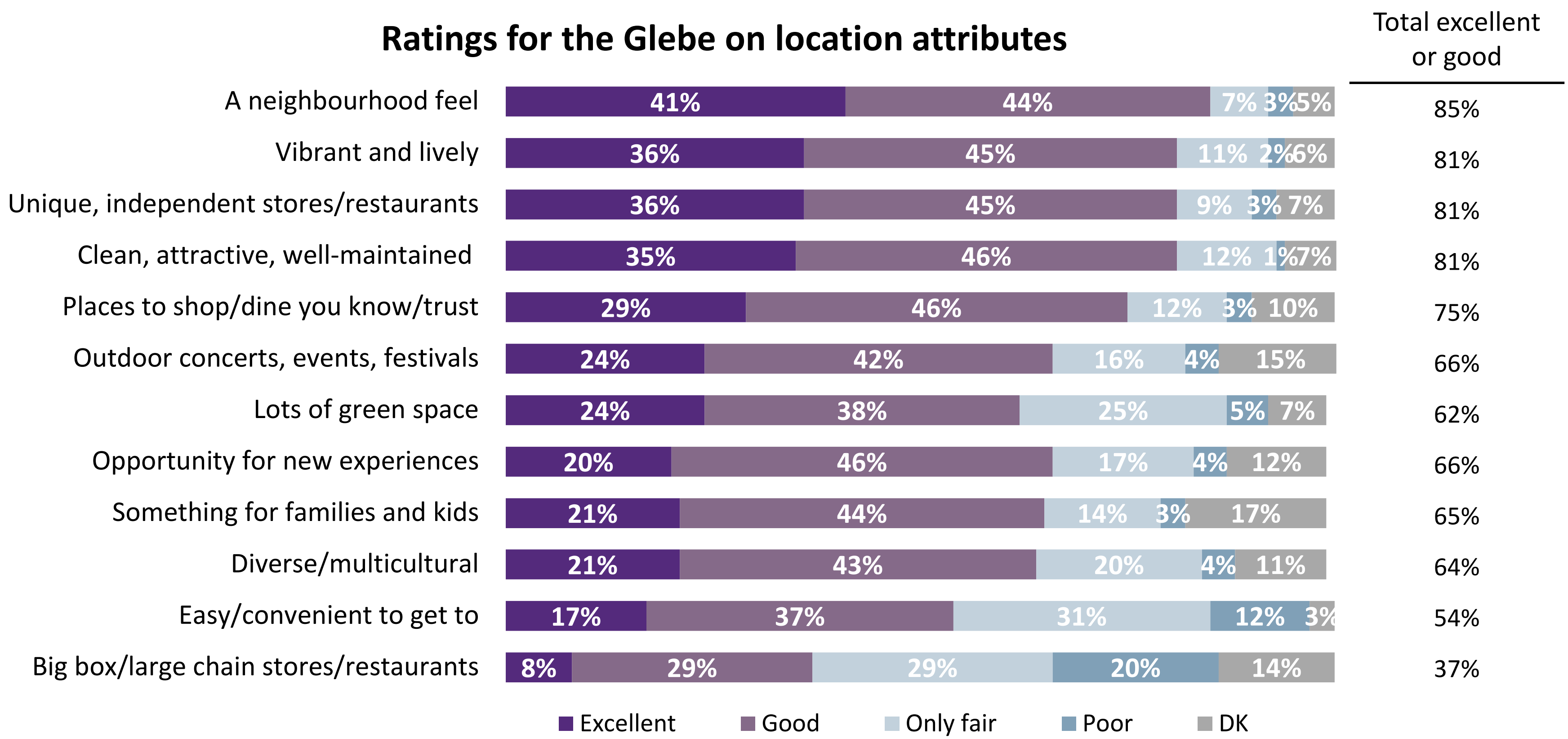
When asked what they would most like to see changed or improved about the Glebe, residents are most likely to cite changes that would improve accessibility to the area. This includes more parking and reducing congestion by supporting other forms of transportation including public transit, biking and walking.

These concerns are largely similar across locations and demographic segments. Parking is more widely mentioned by women (46%) and those in the upper income brackets (40% with incomes of $50K and over vs. 24% earning less than $50K). Core residents are most likely to mention better traffic safety (13%).

Notably, less recent visitors (past year or over a year ago) identify the same concerns are recent (past month) visitors. That is, the areas they would like to see changed or improved are not significantly different from those who are more recently acquainted with the Glebe.

Q.7 What would you most like to see changed or improved about the Glebe? (UNPROMPTED)

Glebe is rated most highly for its neighbourhood feel, followed by being vibrant, unique and well-maintained

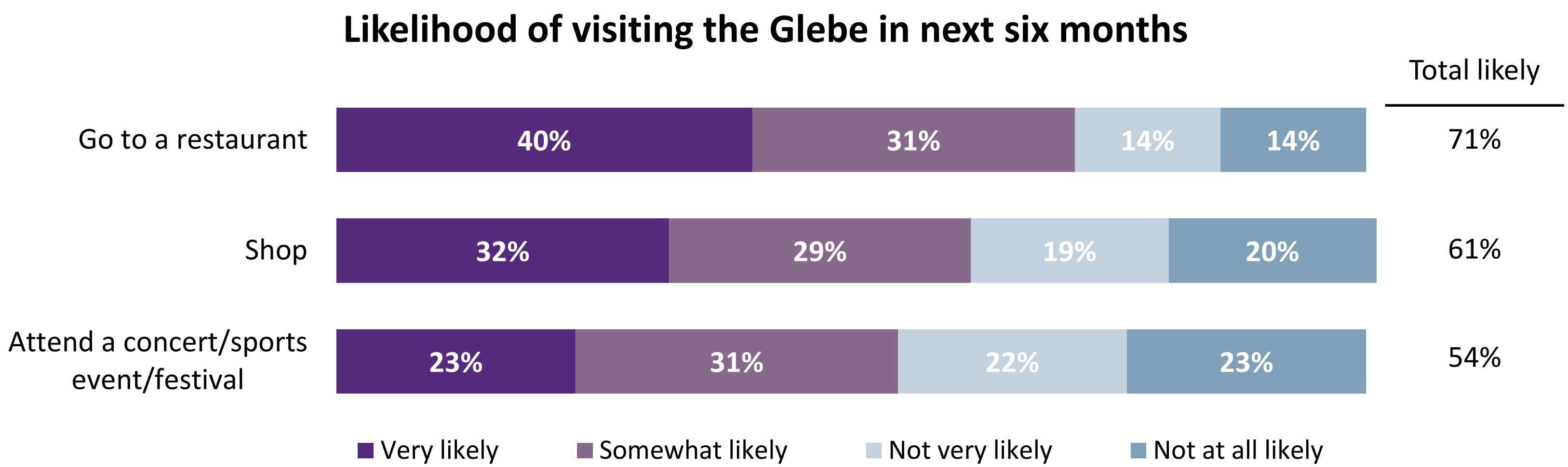


Ottawa residents rate the Glebe most highly for having a neighbourhood feel (41% excellent), followed by being vibrant/lively (36%) having unique, independent stores and restaurants (36%) and being well-maintained (35%). It receives its lowest scores for convenience (17%) and having large chain stores and restaurants (8%).

Having recently visited the Glebe (past month) is linked to more positive ratings across all attributes. Younger residents (18-39) also rate the Glebe more highly for most attributes, particularly for being vibrant and lively (52%). Core residents give the highest ratings for accessibility and convenience (32% excellent, vs. 17% in the inner suburbs and 11% in the outer suburbs).

Q.9 Based on what you know or have heard, does the Glebe do an excellent, good, only fair or poor job in each of the following areas?

Four in ten residents are very likely to go to a restaurant in the Glebe in the next six months, with somewhat fewer likely to shop or attend an event



Significant minorities of Ottawa residents say they are *very likely* to visit the Glebe in the next six months (the most accurate indicator of true intent to visit), either to go to a restaurant (40%), shop (32%) or attend a concert or other special event (23%). In total, one in five (20%) residents say they are not very or not at all likely to visit the Glebe for any of these three reasons in the next six months.

Strong likelihood to visit the Glebe varies primarily by location and age. Core residents are more likely than others to say they will likely go to a restaurant (61%) or shop (52%) in the Glebe. The likelihood to shop (38%) or go to a concert (26%) skews to those under age 60, while intent to go to a restaurant skews to younger residents (52% of those aged 18-34).

Q.11 Would you say you are very likely, somewhat likely, not very likely or not at all likely to do each of the following in the Glebe in the next six months?

Strong likelihood to visit the Glebe is highest among recent (past month) visitors.

Very likely to visit the Glebe in next six months

By most recent visit to the Glebe

	Visited in past month	Visited over one month to within past year	Visited over one year ago/ never
Restaurant	58%	29%	10%
Shop	46%	19%	12%
Concert/special event	31%	17%	9%

Upcoming visits to the Glebe are most likely to draw from recent (past month) visitors.

Among individuals who have been to the Glebe in the past year but not recently, three in ten (29%) say they are very likely to visit a restaurant, while close to two in ten will shop (19%) or go to a special event (17%).

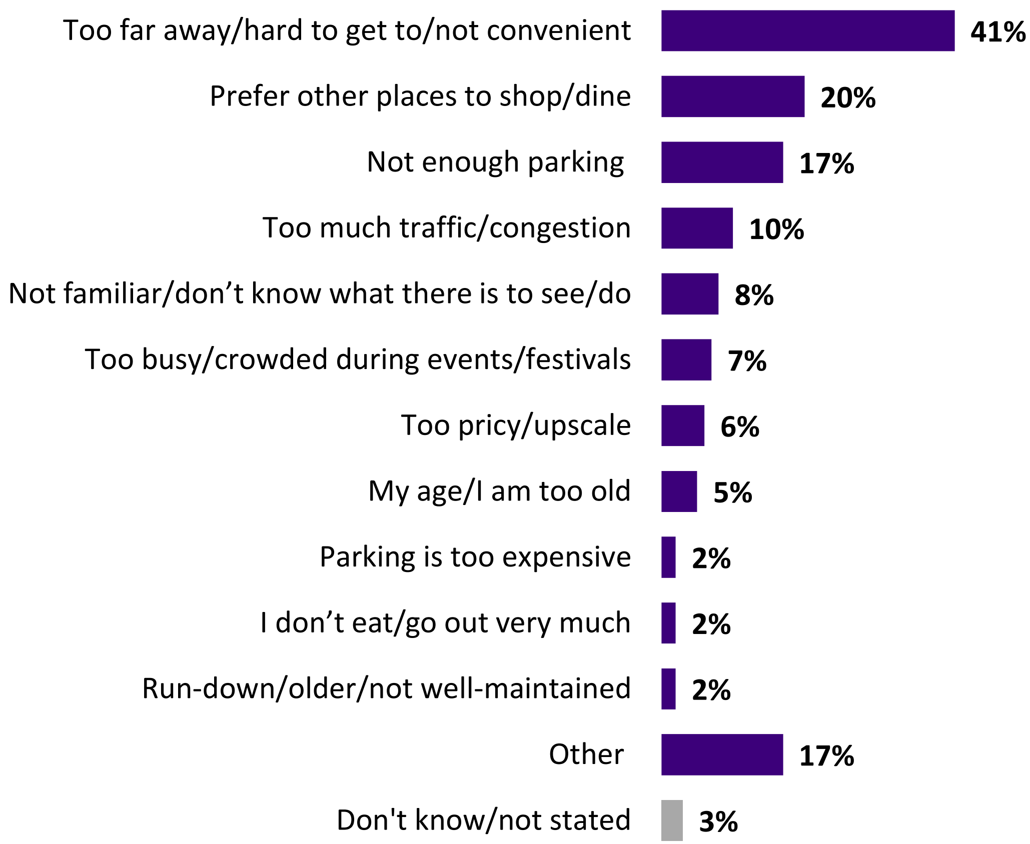
Strong likelihood to visit the Glebe is lowest among those who have not been in the past year, with about one in ten each who are very likely to shop (12%), dine (10%) or go to a special event (9%) in the next six months.

Q.11 Would you say you are very likely, somewhat likely, not very likely or not at all likely to do each of the following in the Glebe in the next six months?

The main reason for not visiting the Glebe in the next six months is that it is too far away or is not convenient to get to

Why not likely to visit the Glebe in next six months

Among those not very/not at all likely to visit the Glebe in next six months (20% of total sample)



Among the one in five Ottawa residents who are unlikely to visit the Glebe in the next six months, the main reasons are related to difficulties getting to, from and around the area: too far away/not convenient (41%), not enough parking (17%), too much traffic/congestion (10%) and expensive parking (2%).

Other reasons reflect a perceived lack of relevant options available: a preference for other places to shop/dine (20%), lack of familiarity with the Glebe (8%), or that the Glebe is too pricey/upscale (6%), too young (5%) or too old (2%).

(Note: subsample sizes are too small to analyze the results by location or demographics).

Q.12 Why are you not likely to visit the Glebe in the next six months?
SUBSAMPLE: Those not very or t all likely to visit the Glebe to attend a concert/sports event/festival, go to a restaurant or shop in the next six months (N=98)

Performance matrix

How to read the Performance Matrix

Performance Matrix – How to Read:

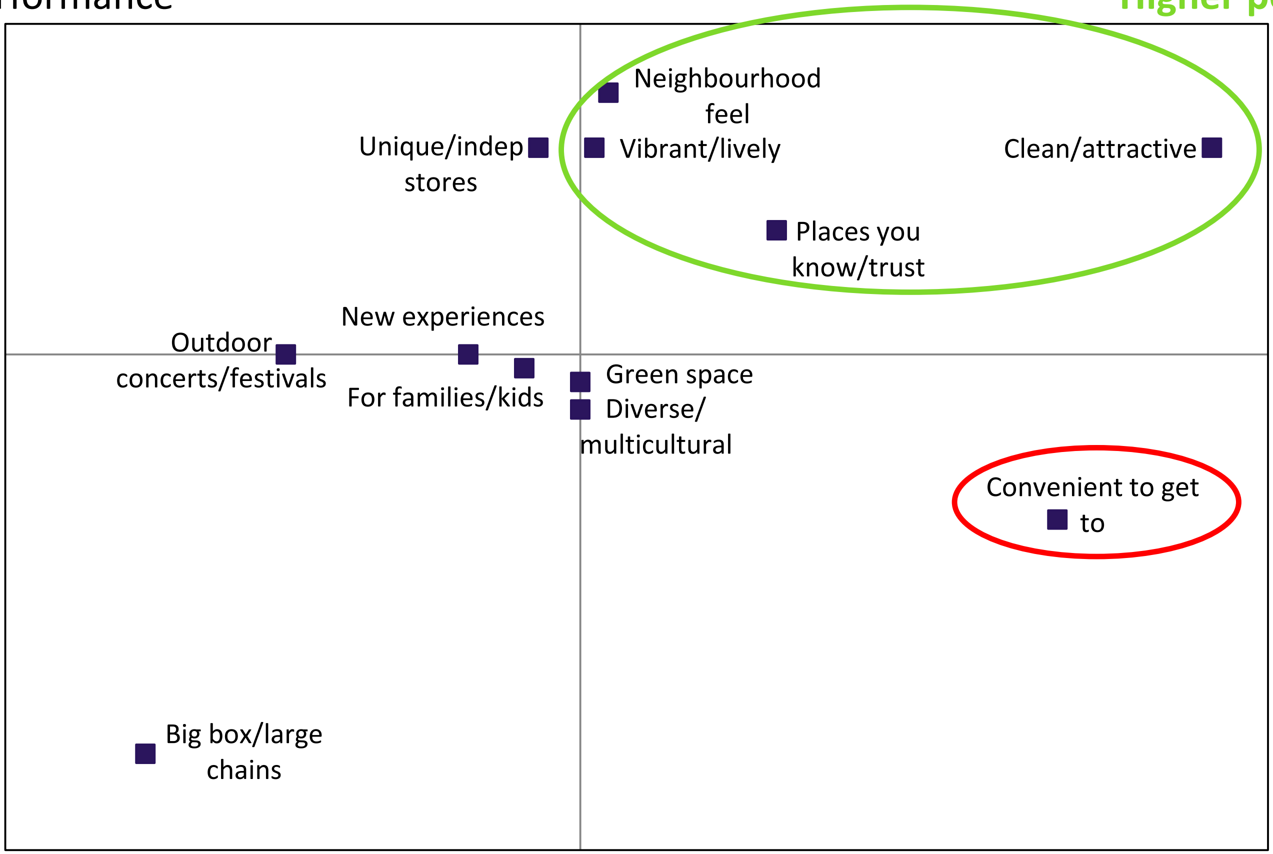
- In conducting importance and performance assessments, factors or services with the lowest levels of performance or lowest importance ratings may not necessarily be the areas where improvement is most desired or needed. For example, if residents don't associate the Glebe with a specific attribute but this attribute is judged unimportant, then focusing on improving this attribute will probably have limited impact on their overall views of the Glebe. (See page xx for the importance ratings and page xx for the raw performance scores).
- The following two-dimensional graph maps out residents' level of importance for a specific factor and how they rate the Glebe's performance on that factor, thereby identifying strengths and areas for improvement.

Secondary Strengths Lower importance and higher performance. Less critically perceived areas of importance and the Glebe is doing well in these areas.	**Primary Strengths** Higher importance and higher performance. Areas viewed as main strengths of the Glebe and critical to residents' assessment of the area.
Secondary Improvements Lower importance and lower performance. Factors perceived as needing improvements but viewed as a lower priority (at this time and in comparison to only those factors measured)	**Primary Improvements** Higher importance and lower performance. Factors perceived as needing improvements and should be considered as the primary focus of future efforts.

Convenience/access to the Glebe is the main barrier to be addressed

Lower importance
Higher performance

Higher importance
Higher performance



Lower importance
Lower performance

Higher importance
Lower performance

Q.2 Thinking of the places that you like to go to shop, dine or for entertainment, how important to you are the following elements? Is it very important, somewhat important, not very important or not at all important to you that the area [FIRST ITEM]? What about [REMAINING ITEMS]?
Q.9 Based on what you know or have heard, does the Glebe do an excellent, good, only fair or poor job in each of the following areas?

Conclusions

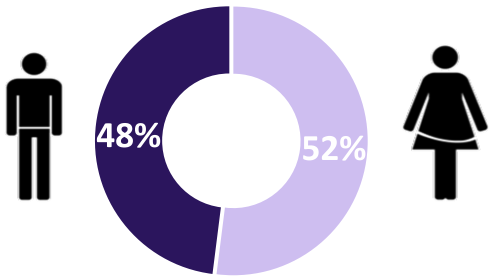
Conclusions and recommendations

- Future efforts to promote the Glebe will be starting from a position of strength. The Glebe is a well-known and well-regarded brand, with many residents who have experienced it and view it in a positive light. It is best known as an attractive, vibrant area with a neighbourhood feel, that offers an appealing mix of stores and restaurants.
  - As a whole, the results suggests an opportunity to build on the “lifestyle” angle of the Glebe, as an upscale and trendy destination situated in a friendly and intimate environment.
- Going forward, there is a need to address the perceptions that the Glebe is not easy or convenient to get to/from or around. This is particularly necessary to broaden the area’s appeal beyond younger residents and those who live downtown. It is unclear the extent to which Lansdowne has contributed to this perception, but it has the potential to erode existing perceptions of the Glebe as having a neighbourhood feel.
  - The solution likely involves some combination of concrete actions to reduce congestion and parking issues (depending on feasibility) and communications about improvements that are being put in place (e.g., public transit options, traffic calming measures, bike lane availability).

Profile of respondents

Weighted profile of respondents

GENDER



AGE

18-39	40-59	60+
39%	**38%**	**23%**

EDUCATION

20% High school diploma or less
30% College
30% Undergraduate university
19% Post-graduate degree

HOUSEHOLD INCOME

16% Under $50,000
18% $50K –$80K
24% $80K-$120K
26% $120K+
17% Refused

Geographic stratification

Environics used the Forward Sortation Area or FSA (the first three digits of a postal code) to stratify Ottawa into three geographic areas based on proximity to the Glebe: core, inner suburbs and outer suburbs. The following table details the FSAs assigned to each of the three regions, as well as the total number of completed interviews and the proportion of the final sample represented by the regions (weighted to Census data).

Area	Number of interviews (unweighted)	% of final sample (weighted)	Example neighbourhoods	FSA
Core	140	15%	Centretown, Glebe, Sandy Hill, Hintonburg, Alta Vista	K1N, K1P, K1R, K1S, K1Y, K2P, K1H
Inner suburbs	195	49%	Vanier, Beacon Hill, Hunt Club, Westboro, Nepean	K1L, K1M, K1B, K1G*, K1J, K1K, K1T, K1V, K1Z, K2A, K2B, K2C, K2E, K2G*, K2H
Outer suburbs	166	36%	Orleans, Barrhaven, Kanata, Stittsville	K1C, K1E, K1W, K1X, K2J, K2K, K2L, K2M, K24, K2S, K2T, K2V, K2W, K4A, K4B, K4C, K4M, K4P

** These two FSAs were divided, with the areas bordering the Glebe categorized as core and the remaining areas categorized as inner suburbs. For K1G, postal codes north of Smyth Road were included in the core; the remainder were categorized as inner suburbs. For K2C, postal codes north of Heron Rd and east of Fisher were included in the core; the remainder were categorized as inner suburbs.*

Appendix: Questionnaire

Environics Research
July 7, 2016

Glebe BIA
Survey Questionnaire

Introduction

Good morning/afternoon/evening. My name is ______________ and I am calling from Environics Research here in Ottawa. Today we are conducting a survey with Ottawa residents about our community. Please be assured that we are not selling or soliciting anything.

[IF ASKED: The survey will take about 10 minutes to complete]

[IF ASKED: I can tell you at the end who sponsored this survey]

IF LANDLINE SAMPLE:
We choose telephone numbers at random and then select one person from each household to be interviewed. To do this, we would like to speak to the person in your household, 18 years of age or older, who has had the most recent birthday. Would that be you?

IF PERSON SELECTED IS NOT AVAILABLE, ARRANGE FOR CALL-BACK

1. What neighbourhoods in Ottawa come to mind as the best for shopping, restaurants and entertainment such as sports events, concerts and festivals?
DO NOT READ LIST – CODE ALL THAT APPLY
PROBE: Any others?
IF RESPONDENT SAYS "MY NEIGHBOURHOOD", ASK TO SPECIFY WHICH ONE THAT IS
IF RESPONDENT SAYS "BANK STREET", CLARIFY: Which part of Bank Street are you thinking of? Bank Street north of the Queensway, south of the Queensway to Lansdowne Park at the canal, or south of the canal? IF NORTH=CODE 03, IF SOUTH TO CANAL=CODE 05, SOUTH OF CANAL=CODE 08

01 – Byward Market
02 – Chinatown
03 – Downtown Ottawa/Centretown
04 – Elgin Street
05 – The Glebe
06 – Hintonburg/Wellington West
07 – New Edinburgh/Beechwood
08 – Old Ottawa South
09 – Preston Street/Little Italy
10 – Sandy Hill
11 – Westboro
12 – Vanier
98 – Other mention (SPECIFY)
99 – DK/NA

2. Thinking of the places that you like to go to shop, dine or for entertainment, how important to you are the following elements? Is it very important, somewhat important, not very important or not at all important to you that the area [FIRST ITEM]? What about [REMAINING ITEMS]?
RANDOMIZE

a. Has big box or large chain stores and restaurants
b. Has unique, independent stores and restaurants
c. Is easy and convenient to get to
d. Is clean, attractive and well-maintained
e. Has lots of green space
f. Has something for families and kids
g. Is vibrant and lively
h. Has a neighbourhood feel
i. Is diverse and multicultural
j. Has outdoor concerts, events and festivals
k. Provides the opportunity for new experiences
l. Has places to shop and dine that you know and trust

01 – Very important
02 – Somewhat important
03 – Not very important
04 – Not at all important
VOLUNTEERED
99 – Don't know/No answer

The Glebe is a neighbourhood just south of downtown Ottawa. It is bounded by the Queensway to the north, the Rideau Canal to the south and east, and Dows Lake and Preston Street to the west. The Glebe is home to Lansdowne Park and the TD Place Stadium.

3. If you could use one or two words to describe the Glebe, what would they be?
RECORD VERBATIM – DO NOT CODE

99 – Nothing/DK/NA

4. Before I continue, do you currently live or work in the Glebe?

01 – Yes	RESIDENT – SKIP TO Q.6
02 – No	NON-RESIDENT

5. [NON-RESIDENTS ONLY] When was your most recent visit to the Glebe, for shopping, dining or for entertainment such as a concert, sports event or festival?
DO NOT READ EXCEPT TO CLARIFY

01 – In the past week
02 – In the past month
03 – In the past two to three months
04 – In the past six months
05 – In the past year
06 – Over a year ago
07 – Never SKIP TO Q.9
VOLUNTEERED
99 – DK/NA

6. What do you like most about [NON-RESIDENTS: visiting] the Glebe?
DO NOT READ LIST – CODE ALL THAT APPLY

01 – Variety of stores/unique/eclectic
02 – Good restaurants
03 – Good atmosphere/lively/energetic
04 – Lots of festivals/special events/outdoor activities
05 – Community/neighbourhood feel
06 – Lots of trees/green space
07 – Convenient/easy to get to
08 – Recreational opportunities/biking/walking/skating
09 – Lansdowne Park
10 – TD Place Stadium
11 – Aberdeen Pavilion
12 – The canal/Rideau canal
98 – Other mention (SPECIFY)
99 – DK/NA

7. What would you most like to see changed or improved about the Glebe?
DO NOT READ LIST – CODE ALL THAT APPLY

01 – More parking
02 – Cheaper parking
03 – Less traffic/reduce congestion
04 – Improved traffic safety/crosswalks/signage
05 – Better/more frequent public transit
06 – Cleaner/better maintained/updated/beautified
07 – Better/wider selection of stores
08 – Better/wider selection of restaurants
09 – Bike lanes
98 – Other mention (SPECIFY)
99 – DK/NA

ASK Q8 OF ALL RESIDENTS AND OF NON-RESIDENTS WHO HAVE VISITED IN THE PAST YEAR (Q.5 CODES 1-5)

8. How often would you say you…?
READ IN ORDER SHOWN.

a. Go to a concert, sports event or festival in the Glebe

b. Go to a restaurant at Lansdowne Park

c. Go to a restaurant in the Glebe other than at Lansdowne Park

d. Shop at a store at Lansdowne Park

e. Shop at a store in the Glebe other than at Lansdowne Park

01 – Daily (DO NOT READ FOR ITEM 8a)
02 – Weekly
03 – Monthly
04 – Two or three times a year
05 – Once a year
06 – Less often than once a year
07 – Never
VOLUNTEERED
99 – DK/NA

9. Based on what you know or have heard, does the Glebe do an excellent, good, only fair or poor job in each of the following areas?
RANDOMIZE

a. Having big box or large chain stores and restaurants
b. Having unique, independent stores and restaurants
c. Being easy and convenient to get to
d. Being clean, attractive and well-maintained
e. Having lots of green space
f. Has something for families and kids
g. Being vibrant and lively
h. Having a neighbourhood feel
i. Being diverse and multicultural
j. Having outdoor concerts, events and festivals
k. Providing the opportunity for new experiences
l. Having places to shop and dine that you know and trust

01 – Excellent
02 – Good
03 – Only fair
04 – Poor
VOLUNTEERED
99 – Don't know/No answer

10. What other Ottawa neighbourhoods, if any, would you consider to offer the same type of shopping, dining and entertainment experience as what you could expect of the Glebe?
DO NOT READ LIST – CODE ALL THAT APPLY – USE SAME CODEFRAME AS Q1
PROBE: Any others?

01 – Byward Market
02 – Chinatown
03 – Downtown Ottawa/Centretown/Bank Street
04 – Elgin Street
05 – The Glebe
06 – Hintonburg/Wellington West
07 – New Edinburgh/Beechwood
08 – Old Ottawa South
09 – Preston Street/Little Italy
10 – Sandy Hill
11 – Westboro
12 – Vanier
98 – Other mention (SPECIFY)
97 – None/Glebe is unique
99 – DK/NA

11. Would you say you are very likely, somewhat likely, not very likely or not at all likely to do each of the following in the Glebe in the next six months?
RANDOMIZE

a. Attend a concert, sports event or festival

b. Go to a restaurant

c. Shop

01 – Very likely
02 – Somewhat likely
03 – Not very likely
04 – Not at all likely
VOLUNTEERED
99 – Don't know/No answer

12. [IF NOT VERY OR NOT AT ALL LIKELY TO ALL Q.11] Why are you <u>not</u> likely to visit the Glebe in the next six months?
DO NOT READ LIST – CODE ALL THAT APPLY

01 – Too far away/hard to get to/not convenient
02 – Too much traffic/congestion
03 – Too busy/crowded during sports events/festivals
04 – Not enough parking
05 – Parking is too expensive
06 – Doesn't have the kinds of stores I like/want
07 – I don't eat/go out very much
08 – Run-down/older/not well-maintained
09 – Prefer other parts of Ottawa/other places to shop/dine
10 – Too pricy/upscale
11 – Not familiar with it/don't know what there is to see/do
98 – Other mention (SPECIFY)
99 – DK/NA

DEMOGRAPHICS

To finish up, I would like to ask you a few final questions about you and your household for statistical purposes only. Please be assured that your answers will remain completely confidential.

D1. What is the highest level of education that you have <u>completed</u>?
DO NOT READ – CODE ONE ONLY

01 – Grade school or some high school
02 – Completed high school
03 – Some university or college
04 – Completed college diploma
05 – Completed university degree
06 – Post graduate/professional school (Master's Degree or PhD)
07 – No schooling
99 – DK/NA

D2. In what year were you born?

___________ Year
99 – DK/NA

D3. For statistical purposes only, we need information about your income. All individual responses will be kept confidential. Which of the following categories best corresponds to the <u>total annual</u> income, <u>before taxes</u>, of <u>all</u> members of your household, <u>for 2015</u>?
READ

01 – Under $50,000
02 – $50,000 to less than $80,000
04 – $80,000 to less than $120,000
05 – $120,000 to less than $150,000
06 – $150,000 and over
99 – REFUSE/DK/NA

D4. And to better understand how results vary by neighbourhoods of different sizes, may I please have your 6-digit postal code?
IF RESPONDENT REFUSES, ASK FOR FIRST THREE DIGITS ONLY

___ ___ ___ ___ ___ ___
999-999 – DK/NA

This completes the survey. In case my supervisor would like to verify that I conducted this interview, may I please have your first name?

First Name: __________________

On behalf of the Glebe BIA, thank you very much for your time and assistance.

Thank and End Interview

RECORD

D5. Gender

01 – Male
02 – Female

D6. Sample

01 – Landline
02 – Cell phone

THE GLEBE BIA

JUNE 30, 2016

PERSONIFICATION

ENVIRONICS
ANALYTICS

the glebe

BACKGROUND & OBJECTIVES

BACKGROUND

- The Glebe BIA wants to develop a marketing campaign geared to encourage local and regional residents to visit The Glebe more often, stay longer and spend more at locations within the area

OBJECTIVES

- To help The Glebe BIA develop a strong and effective marketing campaign based on a clear understanding of its target audience within its local and nearby market area, in additional to other Ottawa-area residents likely to visit the major attractions hosted at Lansdowne Park
- Develop custom target groups representing key opportunity segments, and provide a rich description of priority target groups to support its marketing initiatives

DELIVERABLES

✓ The Glebe BIA Service Area Maps

✓ Full persona – Urban Young

✓ Mini persona – Upscale Elite*

✓ Infographic of The Glebe BIA*

*Accompanied material

WHERE WE ARE

the glebe

JUNE

PREPARE DATA

The Glebe BIA Data

Environics Analytics Data

PROPOSE TARGET GROUPS & SERVICE AREA DEFINITION

WE ARE HERE

PERSONIFY & INFOGRAPHIC

MAP WITH CUSTOM VARIABLE

ENVIRONICS ANALYTICS

THE GLEBE BIA TARGET GROUPS

THE GLEBE BIA TARGET GROUPS

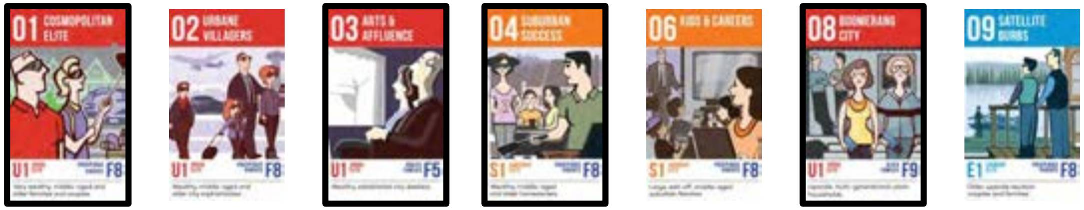
THE GLEBE BIA TARGET GROUPS

the glebe

COUNT OF POPULATION

UPSCALE FAMILIES

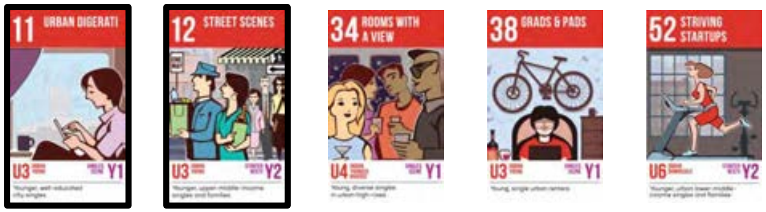
Service Area: 10,520 (18%)
*Ottawa CMA: 279,070 (30%)
Avg Hhld Income: $167,253



MINI PERSONA

URBAN YOUNG

Service Area: 41,078 (69%)
*Ottawa CMA: 89,860 (10%)
Avg Hhld Income: $95,476



FULL PERSONA

YOUNGER FAMILIES

Service Area: 318 (1%)
*Ottawa CMA: 207,981 (22%)
Avg Hhld Income: $134,037

NON-TARGET

Non-Target is comprised of the remaining 52 PRIZM5 segments

Segments with above average presence of The Glebe BIA Visitors

Source: PRIZM5, DemoStats

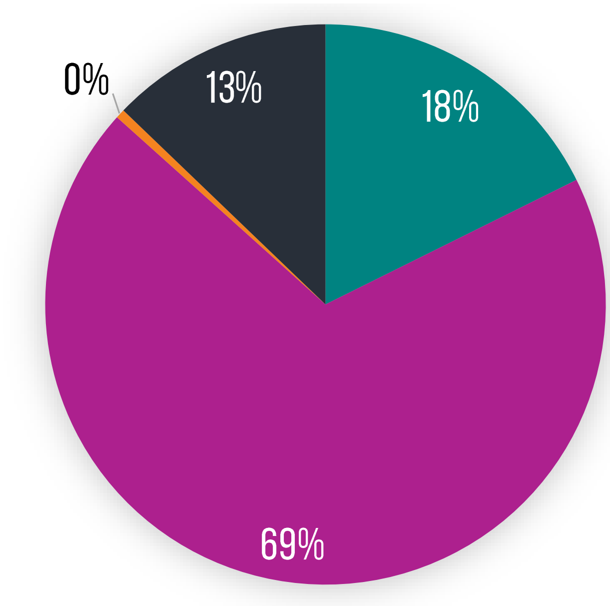
*Ottawa CMA = Ottawa CMA (ON side) excluding population in Service Area

MARKET SIZING

THE GLEBE BIA TARGET GROUPS

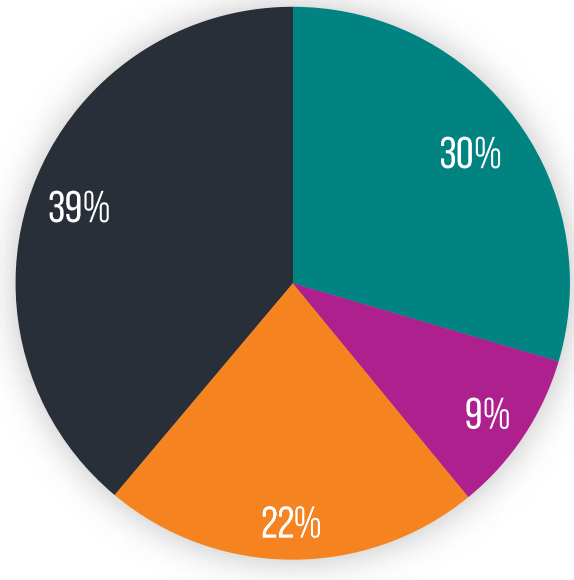
the glebe

THE GLEBE BIA SERVICE AREA



TARGET POPULATION = 87%
(51,916 OF 59,547)

OTTAWA CMA (ONTARIO SIDE) EXCLUDING SERVICE AREA



TARGET POPULATION = 61%
(576,911 OF 943,978)

UPSCALE FAMILIES | URBAN YOUNG | YOUNGER FAMILIES | NON-TARGET

Source: PRIZM5, DemoStats

TARGET GROUP BY ACTIVITIES

THE GLEBE BIA TARGET GROUPS

the glebe

	BIA ACTIVITIES				LANSDOWNE ACTIVITIES		
	High spend on food from restaurants	Shopped at Stand-alone boutique shops	Confidence in small business	Community Involvement	Parks/City Gardens	Concerts at Auditoriums/ Stadiums	Live Professional Football Events
UPSCALE FAMILIES	✓			✓			
URBAN YOUNG		✓		✓	✓	✓	
YOUNGER FAMILIES	✓			✗			✓

✓ Represents above average rates of participating in activity
✗ Represents below average rates of participating in activity

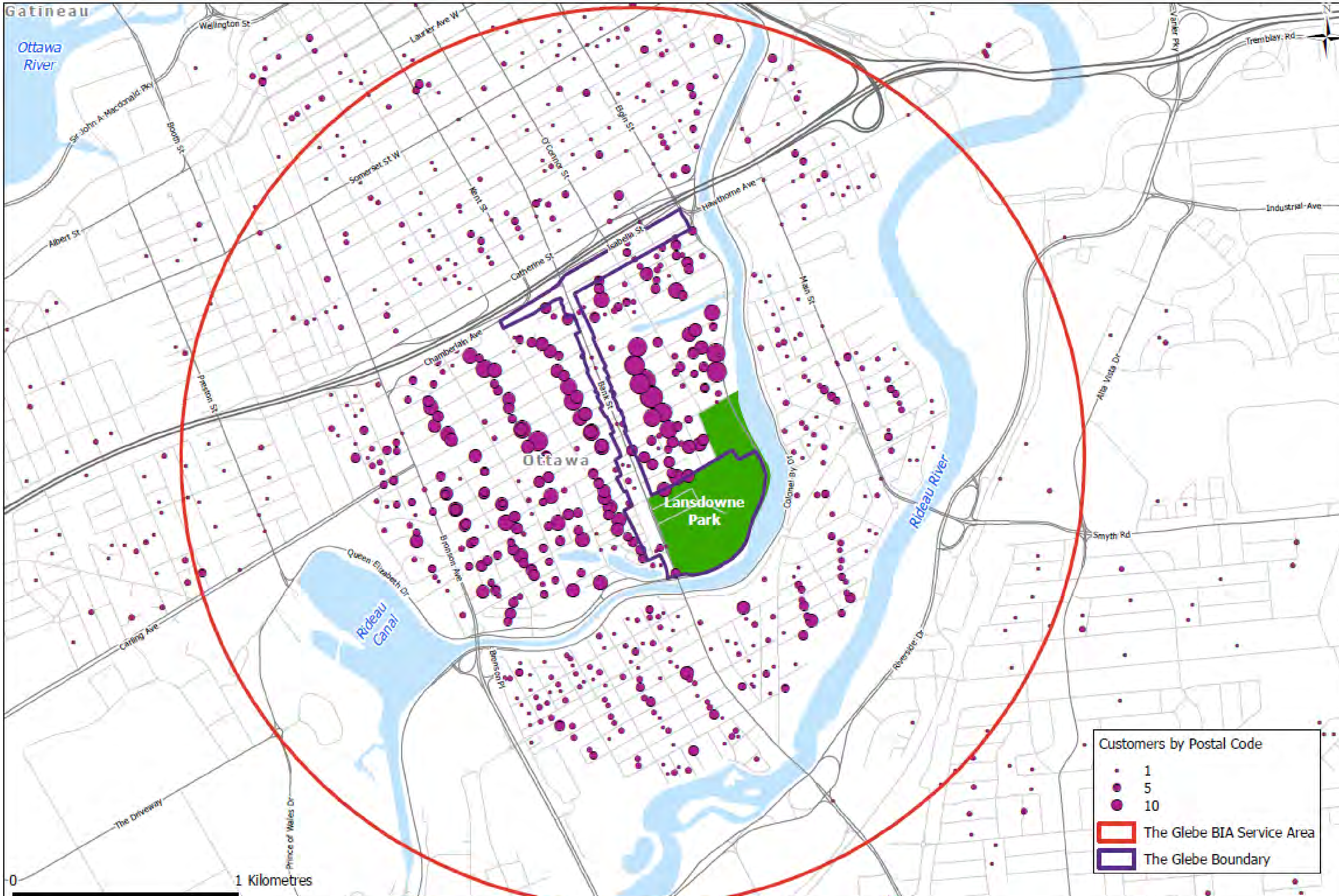
Source: Household Spend, Opticks Powered by Numeris, SocialValues, PRIZM5

Benchmark: Ottawa CMA (ON Side)

THE GLEBE BIA SERVICE AREA - MAPS

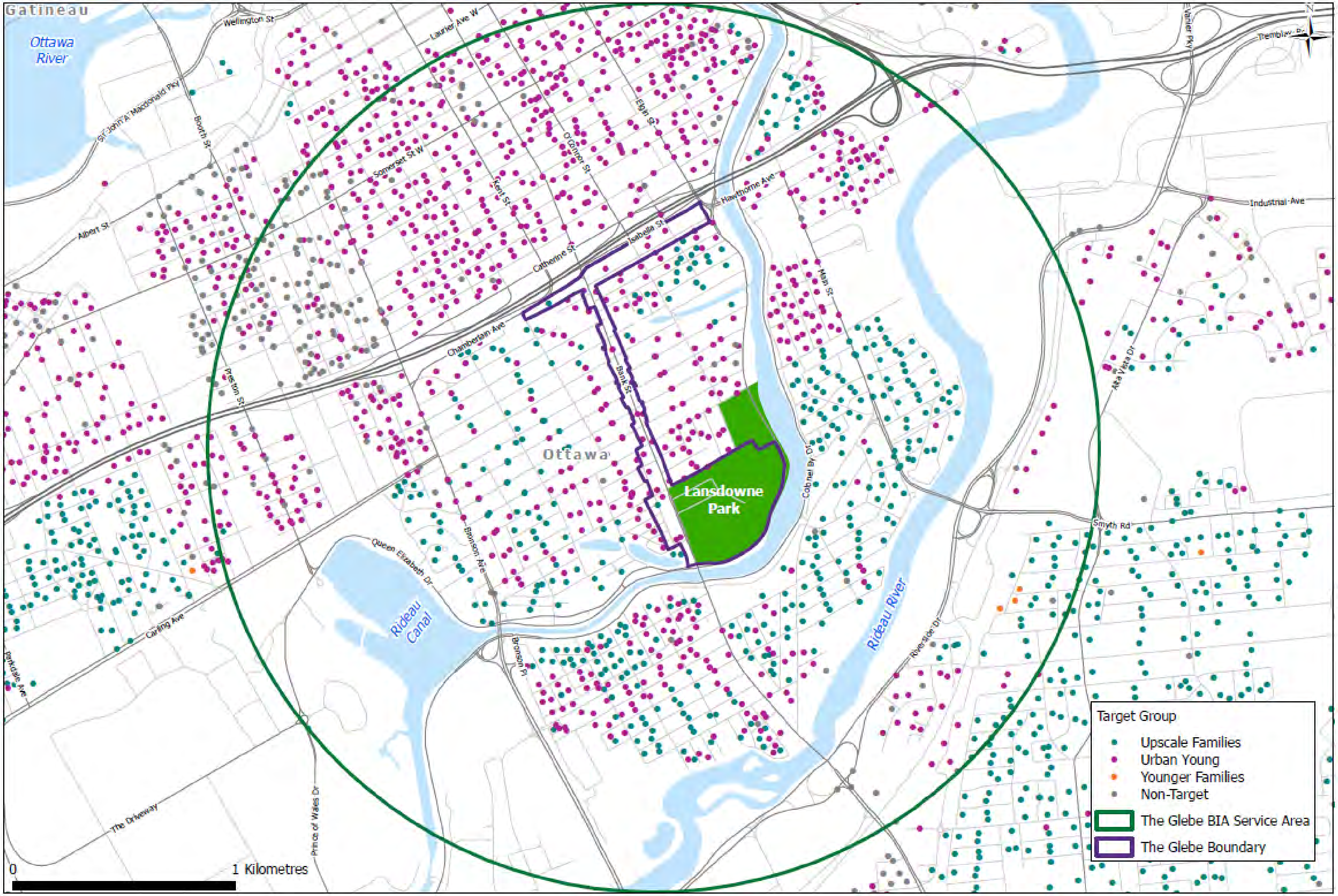
CUSTOMER MAP

THE GLEBE BIA SERVICE AREA



TARGET GROUP DISTRIBUTION

THE GLEBE BIA SERVICE AREA



URBAN YOUNG – FULL PERSONA

MEET THE URBAN YOUNG

VISITOR SEGMENTATION

PRIZM5 SEGMENTS

OVERVIEW

	THE GLEBE SERVICE AREA	OTTAWA CMA - ON SIDE EXCLUDING SERVICE AREA	OTTAWA CMA - ON SIDE
Population	41,079	89,862	130,941
%	68%	10%	13%

FAST FACTS

- Young singles and couples renting homes in older urban communities
- City dwellers who earn an average household income of $95k; likely to be single income earners who hold university degrees and work in white collar occupations such as education, law, government, arts, culture and recreation
- Open-minded and progressive thinkers who believe in the importance of personal expression; they embrace cultural differences in the community, have a desire to be original, and are involved in their community
- These likely urbanites are socially active and enjoy attending local venues such as historical sites, art galleries, museums and city gardens
- Exploring festivals (film, beer/wine, or music) or attending shows and exhibitions (electronic, sportsman, food/wine or fan) are common activities for this group
- Internet and newspapers are used at heavy rates; this group prefers content related to fashion and news that will keep them up-to-date with the latest trends, and news from around the world

Source: PRIZM5, DemoStats 2016, SocialValues 2016, Opticks powered by Numeris 2016

Benchmark: Ottawa CMA (ON Side)

DEMOGRAPHICS

VISITOR SEGMENTATION

URBAN YOUNG

Young, educated singles living in the city centre who work in white collar occupations

LIFE STAGE

Young singles and couples

EDUCATION

University Educated

CAREER

White Collar

HH INCOME

$95K

(Index = 81)

IMMIGRATION

21%

identify as immigrants born outside Canada *(Index = 91)*

DIVERSITY

23%

belong to a visible minority group *(Index = 97)*; Top three visible minority groups by size: Black *(6%; Index = 99)*, Chinese *(4%; Index = 99)*, South Asian *(3%; Index = 87)*

POPULATION AGE

		Index
Preschool (<5)	4%	75
Elementrary School (5-14)	7%	60
Highschool (15-19)	4%	66
Young (20-29)	24%	153
Younger (30-39)	19%	140
Middle-aged (40-54)	19%	88
Older (55-74)	18%	85
Mature (75+)	6%	93

HOUSING CHARACTERISTICS

70%

live in apartments *(Index = 228)*; 40% live in high rise *(Index = 218)*, 26% low rise *(Index = 247)* typically in older urban communities

HOUSEHOLD TENURE

36% own *(Index = 53)*

64% rent *(Index = 199)*

EMPLOYMENT

71%

are in the labour force *(Index = 104)*; in occupations such as education, law, government, arts, culture and recreation

CHILDREN AT HOME

21%

have children living at home *(Index = 51)*

SIZE OF HOUSEHOLD

47% 1 Person *(Index = 170)*

33% 2 Persons *(Index = 100)*

10% 3 Persons *(Index = 65)*

9% 4+ Persons *(Index = 41)*

COMMUTING METHOD

25%

commute by walking *(Index = 309)*; 30% commute by public transit *(Index = 122)*, 6% cycle *(Index = 248)*

Source: PRIZM5, DemoStats 2016

Benchmark: Ottawa CMA (ON Side)

SOCIAL VALUES

VISITOR SEGMENTATION

the glebe

URBAN YOUNG

Open-minded and progressive thinkers who believe in the importance of personal expression

Members of this young singles and couples group are progressive thinkers and are liberal in their views on family, cultures and government; they no longer hold the traditional views that their parents may have and still hold. They embrace the rapidly changing world and have adapted to the complexities of society, especially when it comes to technology. This worldly group are globally-minded and embrace the multicultural make-up of their communities. Questioning authority and discussing local issues among their peers let them feel involved. In their pursuit to be original, they can be seen purchasing beautiful objects as a way of personal expression. They believe that they are in control of their lives and recognize the need to de-stress from everyday responsibilities, which is reflective of their active social lives.

TOP SOCIAL VALUES

Ranked by Index

SOCIAL VALUES TRENDS	INDEX
Flexible Families	152
Adaptability to Complexity	145
Social Learning	137
Equal Relationship with Youth	134
Rejection of Authority	133
Culture Sampling	132
Global Consciousness	132
Pursuit of Originality	129
Consumptivity	126
Personal Control	125
Importance of Aesthetics	123
Need for Escape	123
Personal Creativity	123
Enthusiasm for Technology	122
Penchant for Risk	122

BOTTOM SOCIAL VALUES

Ranked by Index

SOCIAL VALUES TRENDS	INDEX
Cultural Assimilation	65
Attraction to Nature	68
Traditional Family	69
Parochialism	71
Primacy of the Family	71
Aversion to Complexity	76
Brand Apathy	83
Utilitarian Consumerism	83
Religiosity	85
Financial Concern Regarding the Future	88
Buying on Impulse	90
Social Intimacy	90
Civic Apathy	91
Technology Anxiety	92
Importance of Price	92

Index Colouration:	Less than 80	80-110	110-120	120-150	Greater than 150

"I often discuss the problems in my neighbourhood or municipality with people"
(Index = 129)

"Canada would be a much better place if ethnic and racial groups maintained their cultural identities"
(Index = 126)

"I like being in a large crowd"
(Index = 122)

Source: PRIZM5, SocialValues 2016

Base: Population 15+

Benchmark: Ottawa CMA (ON Side)

ENVIRONICS ANALYTICS

LIFESTYLE

VISITOR SEGMENTATION

URBAN YOUNG

Active social urbanites who immerse themselves in the local community

KEY LEISURE & SPORTS INSIGHTS

- Members of this segment have busy lifestyles and can be found enjoying a number of activities that range from attending professional sports events to visiting local attractions
- These young urbanities embrace the local scene and can be found visiting historical sites, art galleries, parks, zoos and fairs
- This adventurous group might explore different festivals (especially ones that feature film, beer/wine or music) or attend various shows and exhibitions (electronic, sportsman, food & wine or fan shows)
- A night out for this lively group may include attending the ballet or going to a comedy club
- Professional tennis, soccer, and auto racing events are the most popular for this group which they attend at above average rates
- To keep active, members of this group participate in physically demanding sports such as snowboarding, inline skating, or adventure sports

TOP LOCAL VENUES

Attended in past year
Ranked by index

Historical Sites	Art gallery/museum	Park/City Gardens	Zoos/aquariums	Fairs/Markets
30%	46%	45%	23%	38%
(Index = 135)	*(Index = 119)*	*(Index = 112)*	*(Index = 107)*	*(Index = 105)*

TOP EVENTS

Attended in past year
Ranked by index

Film Festivals	Ballet/opera	Comedy Clubs	Beer/Wine Festivals	Music Festivals
6%	14%	14%	16%	13%
(Index = 185)	*(Index = 158)*	*(Index = 141)*	*(Index = 134)*	*(Index = 127)*

TOP CONCERT VENUE

Attended in past year
Ranked by index

Night Club	Outdoor Stage/Parks	Theatres/Halls	Auditoriums/Stadiums	Casino
24%	19%	25%	40%	13%
(Index = 162)	*(Index = 136)*	*(Index = 122)*	*(Index = 113)*	*(Index = 97)*

TOP SHOWS & EXHIBITIONS*

Attended in past year
Ranked by index

Electronic/Video	Sportsman	Food/Wine	Fan	Travel
3%	5%	5%	6%	3%
(Index = 263)	*(Index = 223)*	*(Index = 158)*	*(Index = 153)*	*(Index = 152)*

TOP PROFESSIONAL SPORTS

Attended in past year; ranked by index

Tennis	Soccer	Auto Racing
5%	15%	8%
(Index = 137)	*(Index = 125)*	*(Index = 111)*

TOP INDIVIDUAL SPORTS

Occas./ regularly participate in; ranked by index

Snowboarding	Inline Skating	Yoga/Pilates
8%	8%	25%
(Index = 127)	*(Index = 118)*	*(Index = 115)*

TOP TEAM SPORTS

Occas./regularly participate in; ranked by index

Baseball	Soccer	Curling
18%	20%	8%
(Index = 108)	*(Index = 106)*	*(Index = 102)*

*Minimum 2% comp used when selecting top shows and exhibitions
Source: PRIZM5, Opticks Powered by Numeris 2016

Base: Population 12+
Benchmark: Ottawa CMA (ON Side)

MEDIA HIGHLIGHTS

VISITOR SEGMENTATION

the glebe

SOCIAL MEDIA USAGE Within the past month

Facebook	Google+	LinkedIn	Twitter
61% | *Index = 103*	22% | *Index = 87*	23% | *Index = 131*	20% | *Index = 108*
Tumblr	**Instagram**	**Pinterest**	**ONLINE DATING**
5% | *Index = 96*	19% | *Index = 108*	14% | *Index = 88*	4% | *Index = 165*

URBAN YOUNG

Heavy internet and newspaper media users who enjoy news and fashion content

INTERNET
Based on daily usage

92%
use the internet
(index = 101)

Heavy Users

- **Access:** restaurant reviews, TV station websites, home furnishing and travel content
- **Top Activities:** read online newspapers and magazines, share links to friends, listen to online music or podcasts

RADIO
Based on Weekly Usage

84%
listen to the radio
(index = 96)

Light Users

- **Listen to:** jazz, urban, classical, ethnic/multicultural, variety and news/talk programs
- This group values the radio as a channel for discussion on news and public affairs

NEWSPAPER
Based on weekly usage

40%
read the daily newspaper
(index = 110)

Heavy Users

- **Sections Read:** computer/high tech, fashion/lifestyle, travel, and movies & entertainment
- Print editions of national papers such as The Globe and Mail and National Post are read at above average rates on all days

MAGAZINES
Based on daily usage

28%
read magazines
(index = 108)

Medium Heavy Users

- **Genres Read:** alternative, arts & antiques, men's, photography, news & current affairs and fashion
- **Titles Read:** Canadian Health & Lifestyle, National Geographic, Maclean's, and Cineplex magazine

TELEVISION
Based on Weekly Usage

85%
watch television
(index = 93)

Medium Light Users

- **Programs Watched:** sports programs such as tennis and soccer, as well as documentaries and sitcoms
- **Stations Watched:** The Shopping Channel, Turner Classic Movies, Entertainment Television, W Network and AMC

DIRECT

Medium Light Users

- **Preferred Types:** Frequently use online Yellow Pages, general information on the internet and direct mail offers at above average rates

Base: Population 12+

Source: PRIZM5, Opticks Powered by Numeris 2016 Note: Usage is based on quintile distribution; mixed usage indicates strong usage in multiple quintiles

Benchmark: Ottawa CMA (ON Side)

THE GLEBE BIA

VISITOR SEGMENTATION

Upscale Families

June 30, 2016

MEET THE UPSCALE FAMILIES

OTTAWA CMA (ONTARIO SIDE)

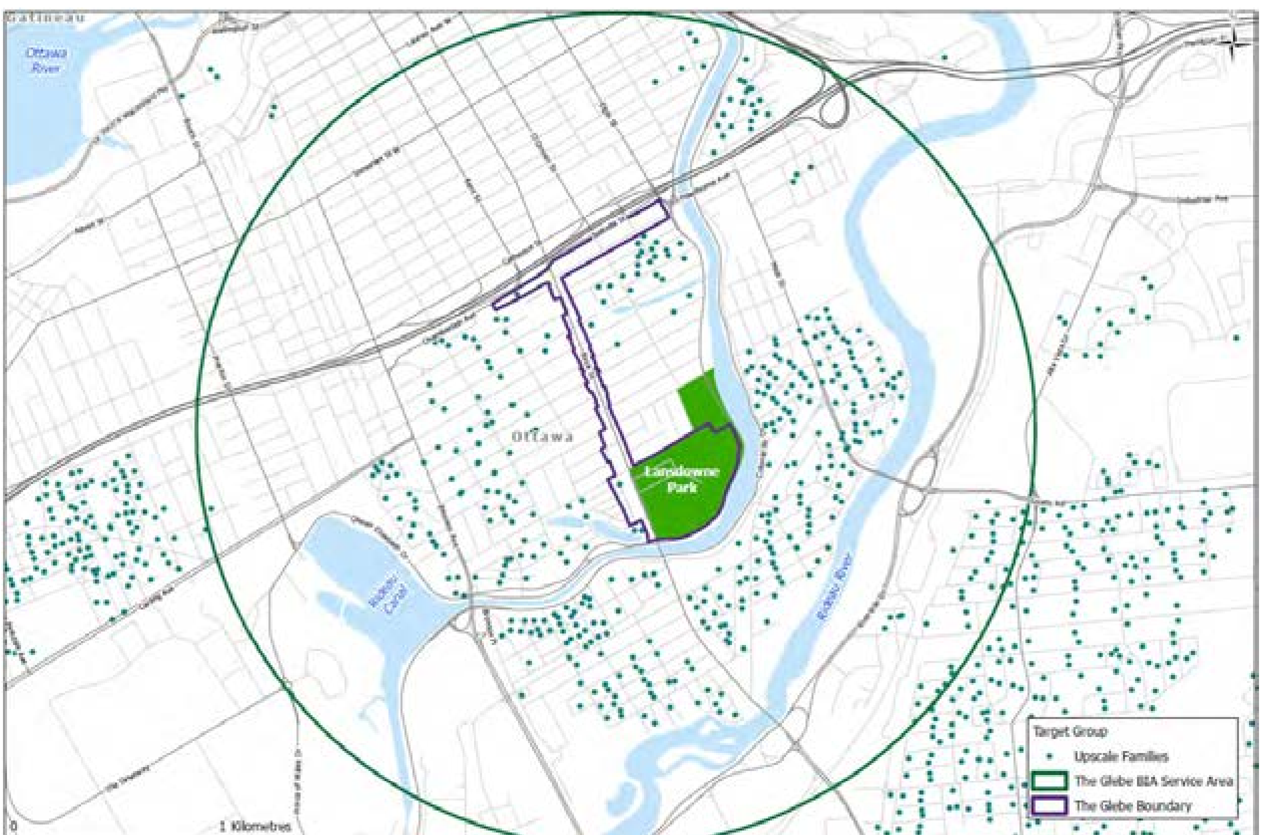
UPSCALE FAMILIES

The *Upscale Families* group living within the Ottawa CMA (Ontario side) is comprised of middle-aged and older maintainers over the age of 55, with older children at home. They are well educated with half holding a university degree or higher; many work in white collar occupations such as management, science, recreation, and public sector. These upscale professionals earn an income of 167K annually, 41% higher than average residents living within the area.

As members of *Upscale Families* enter their later life stages they are beginning to think about their lasting impact on society and about the legacy they want to leave behind, whether financial, cultural or moral. Having accomplished much in their lives, they have a strong work ethic and believe everyone has the ability to shape their own future. *Upscale Families* know what brands they like and have no particular desire to show off to their peers.

Members of this group enjoy less physically demanding evenings out and can be found attending dinner or community theatres. A popular outing for these *Upscale Families* include spectating professional figure skating or golf event. Less strenuous activities such as cross-country skiing, golfing and gardening are common pastimes for this active group as they enter their upper years.

Although *Upscale Families* use the internet at medium light rates, 92% use it daily. Their online behaviour does not differ much from average residents, with many using it as a means to access news, food, and health related content. Facebook is still, by far, the most widely used social media platform for this group. This group read the newspaper at medium light rates and prefer automotive, new homes, travel, fashion and sports sections. They listen to the radio at medium rates and tune in to today's country, sports, mainstream rock and classic hits programs at above average rates.



Source: PRIZM5, DemoStats 2016, Opticks Powered by Numeris 2016, Environics Research Group Social Values 2016

UPSCALE FAMILIES

OTTAWA CMA (ONTARIO SIDE)

289,590
TOTAL POPULATION

101,397
TOTAL HOUSEHOLDS

$167,254
AVG. HHLD INCOME

MAINTAINER AGE
MIDDLE-AGE OR OLDER
32% are over the age of 55; With older children at home

EDUCATION
University Degree

CAREER
White Collar

DIVERSITY
LOW
16% belonging to a visible minority group (Index = 70)

MEDIA HIGHLIGHTS

RADIO	90% listen	Medium
NEWSPAPER	37% read	Medium Light
MAGAZINES	26% read	Medium
TELEVISION	93% watch	Medium Heavy
INTERNET	92% use	Medium Light
DIRECT		Medium Light

- Preferred types of radio stations: today's country, sports, mainstream rock, classic hits
- Preferred newspaper sections: automotive, new homes, travel, fashion, and sports
- Preferred Magazines: photography, gardening, health & fitness, entertainment, and senior citizens
- Like to watch sport programs such as curling, figure skating, golf, CFL, soccer, and tennis
- Like direct mail in forms of mail order and flyers
- Access paid, news and travel content, use online directory, and download discount coupons on the internet

TOP SOCIAL MEDIA USAGE
Ranked by Index

5%	18%	16%	60%	25%	18%
Tumblr	Instagram	Pintrest	Facebook	Google+	Twitter

TOP EVENTS ATTENDED / VISITED
Ranked by Index

4%	5%	13%	7%	21%	28%
Dinner Theatres	Figure Skating	Community Theatre	Golf	Theme Parks	Stadium Concerts

TOP SPORTS/ACTIVITIES PARTICIPATED
Ranked by Index

14%	30%	62%	27%	19%	55%
Cross Country Skiing	Golfing	Gardening	Fishing/Hunting	Downhill Skiing	Volunteering

SOCIAL VALUES*

COMMUNITY	Weak	Community Involvement	Strong
SMALL BUSINESS	Skeptical	Confidence in Small Business	Confident
CONSUMPTION	Weak	Joy of Consumption	Strong
BRAND	Weak	Importance of Brand	Strong
PRICE	Weak	Importance of Price	Strong

TOP SOCIAL VALUES - ATTITUDES
Ranked by Index

"To have a home as well equipped and furnished as that of other people I know is important" – *Index = 125*

"I often discuss problems in my neighbourhood or municipality with people" – *Index = 111*

"I am willing to pay more for brand-name products" – *Index = 111*

Benchmark: Ottawa CMA (Ontario Side)
* Environics Research Group Social Values 2016 Benchmark: Canada
Source: PRIZM5, DemoStats 2016, Opticks Powered by Numeris 2016, Environics Research Group Social Values 2016

DemoStats 2016 Base: Population
Opticks Powered by Numeris 2016 Base: Population 12+
Environics Research Group Social Values 2016 Base: Population 15+

APPENDIX

ENVIRONICS
ANALYTICS

TERMINOLOGY

The Glebe BIA Boundary: The defined Glebe Business Improvement Area

Service Area: 2 km radius from the centroid of The Glebe BIA boundary (75% of customers lie within this area)

Ottawa Market/ Ottawa CMA: The Ottawa census metropolitan area (CMA) consists of one or more neighbouring municipalities situated around a major urban core. For this analysis we are only evaluating the Ontario part of the Ottawa CMA

% Comp: distribution of the variable between the groups or category being analyzed

Penetration Rate or % Pen: Number of members divided by the benchmark count

Index: The percentage of members/people within a target group/trade area/variable compared to the benchmark's percent composition of the same. The result is a score that can be used to determine how this target group compares to it's geographical benchmark (or member base benchmark). For example: an index score of 150 means that this member segment is 50% above or 1.5x the average for that specific variable

METHODOLOGY

APPENDIX

THE GLEBE BIA SERVICE AREA

- The Glebe BIA Service Area was defined by evaluating the distance from customer postal codes to the centroid of The Glebe BIA boundary area
- A 2km radius was determined to the Service Area as it captures 75% of postal codes

TARGET GROUP SELECTION

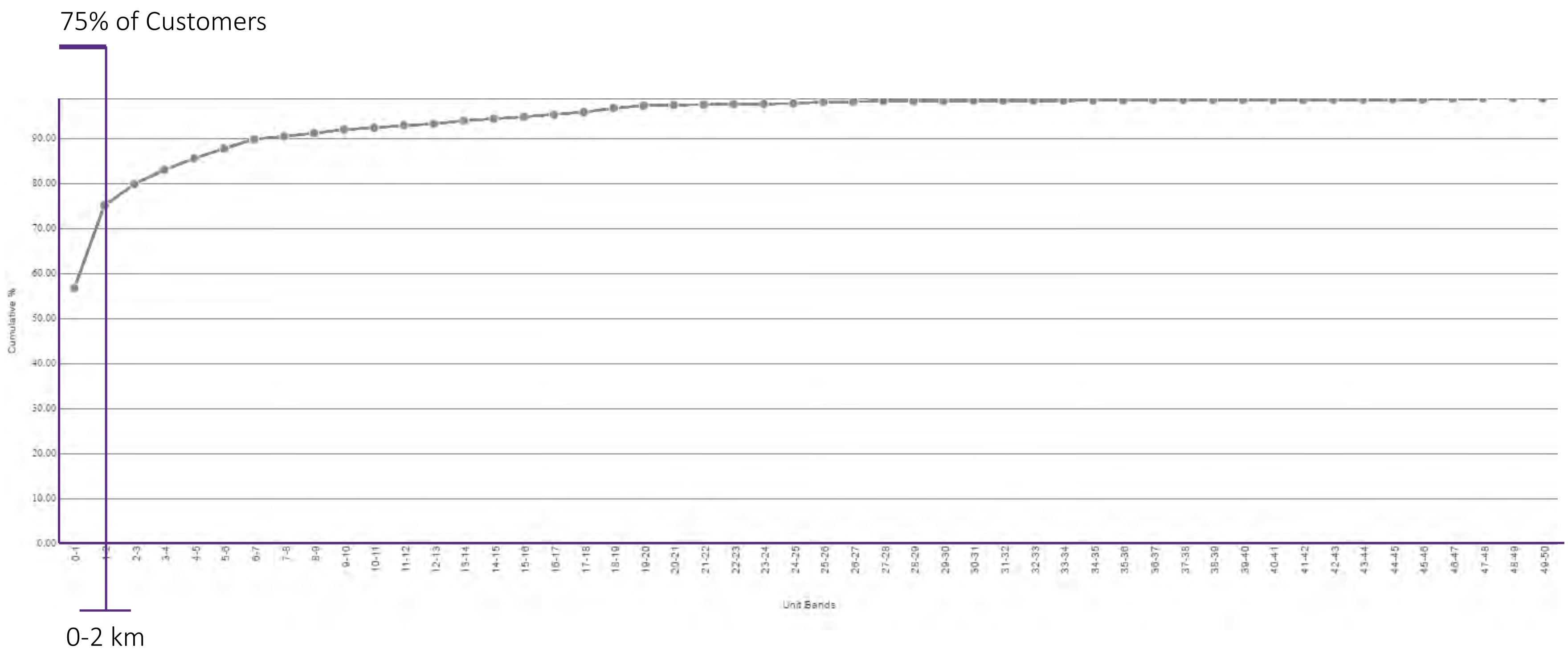
- By looking at the population in the Ottawa market, The Glebe BIA customer records and key driver variables EA assigned each of the 68 PRIZM5 segments into 3 target groups
- Segments deemed 'Target' are present in the Ottawa CMA (greater than 1%) and displayed the desired traits of a Glebe customer (determined by EA driver variables listed below). Target was further split by life stage into 3 groups.
    1. Upscale Families
    2. Urban Young
    3. Younger Families

EA DRIVER VARIABLES:

Variables Indicating Interest in BIA	Variables Indicating Interest in Lansdowne Park
Average Household Income (Current Year $)	Attended/Visited [Pst Yr] - Concerts -- Auditoriums/arenas/stadiums (any)
Food purchased from restaurants	Frequency of attendance - Live Professional Sports Events -- Football -- Occas./Reg.
Store Types -- Shopped [Pst Mth]-- Stand-alone boutique shops	Attended/Visited [Pst Yr] - Local Attractions -- Exhibitions/carnivals/fairs/markets
Community Involvement	Attended/Visited [Pst Yr] - Local Attractions -- Parks/city gardens
Confidence in Small Business	

DEFINING THE SERVICE AREA
APPENDIX

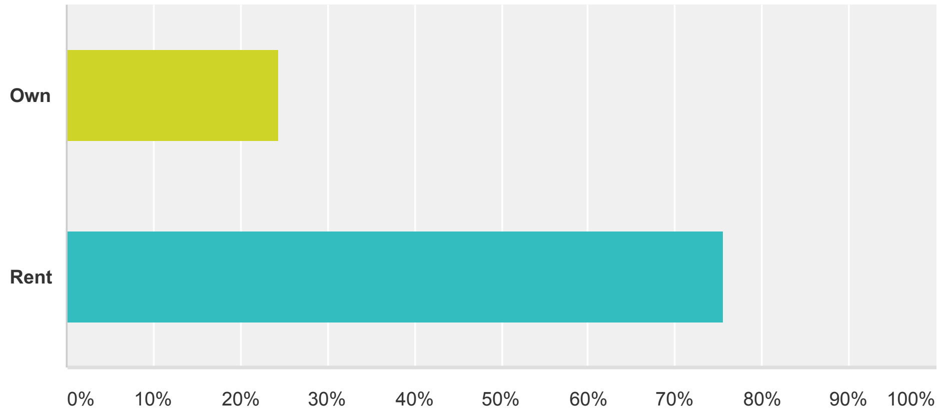
- The Glebe BIA provided a file of 13,645 customer intercept postal codes (4,448 records after deduping), captured during the holiday season from November 15 to December 31 of 2015 through the Glebe Spree ballot contest
- EA conducted a distance decay analysis which measures the distance in 1km intervals from customer postal codes to the centroid of The Glebe BIA Boundary
- A 2km radius is suggested as The Glebe BIA Service Area which covers 75% of customers, to guide trade area development and aligns to best practice used by Toronto area BIAs



Source: ‘Glebe – Spree Data entry Final 2015-2016’ provided on June 1, 2016

Q1 As a business, do you rent or own?

Answered: 49 Skipped: 0



Answer Choices	Responses	
Own	**24.49%**	12
Rent	**75.51%**	37
Total		**49**

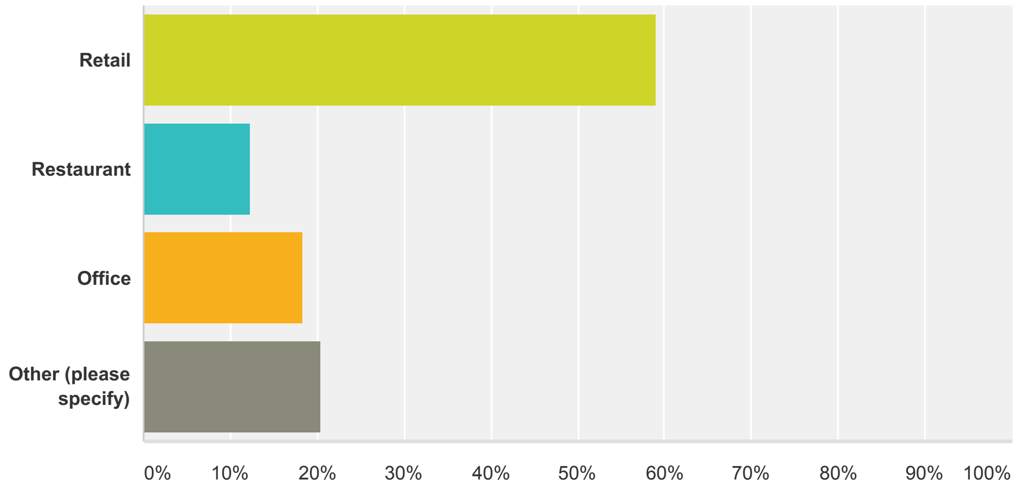
Q2 What is the total square footage used byyour operation?

Answered: 45 Skipped: 4

Average square footage used (by respondents): 2042.36 sqft

Q3 What category best describes your business?

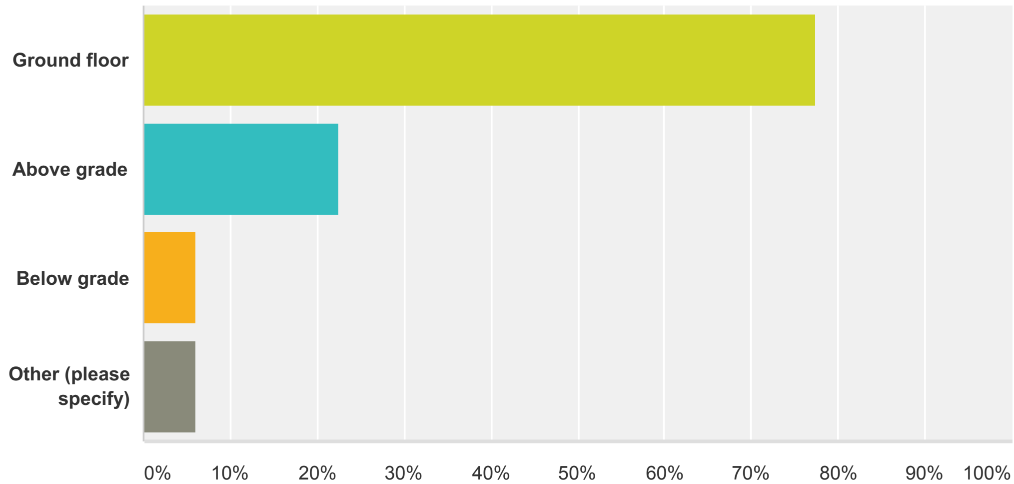
Answered: 49 Skipped: 0



Answer Choices	Responses	
Retail	59.18%	29
Restaurant	12.24%	6
Office	18.37%	9
Other (please specify)	20.41%	10
Total Respondents: 49		

Q4 What category best describes the type of space you use?

Answered: 49 Skipped: 0



Answer Choices	Responses	
Ground floor	**77.55%**	38
Above grade	**22.45%**	11
Below grade	**6.12%**	3
Other (please specify)	**6.12%**	3
Total Respondents: 49		

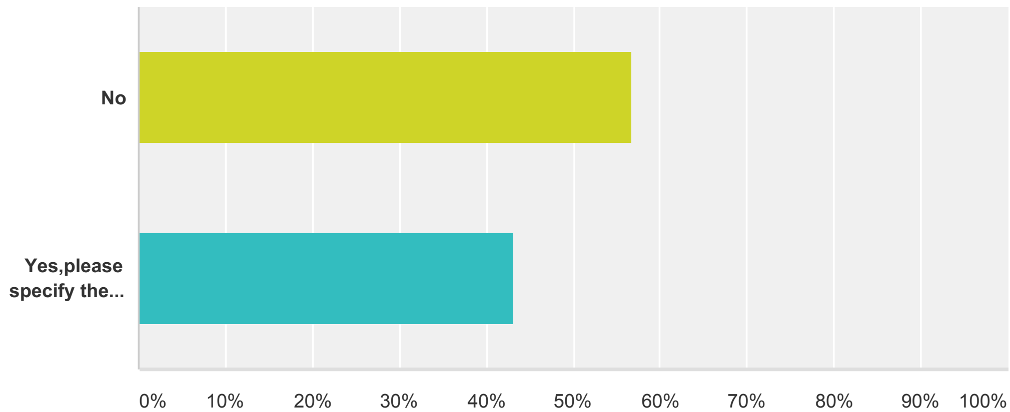
Q5 What is your base rent (cost) per square foot? (Annual lease amount (net of HST) divided by the total number of square feet leased – eg. $60,000 divided by 1,500 square feet = $40 per square foot.)

Answered: 32 Skipped: 17

Average base rent (cost) per square foot (as declared by respondents): $36.61

Q6 In addition to thebase amount indicated above, do you pay your landlord for extraoperating costs?

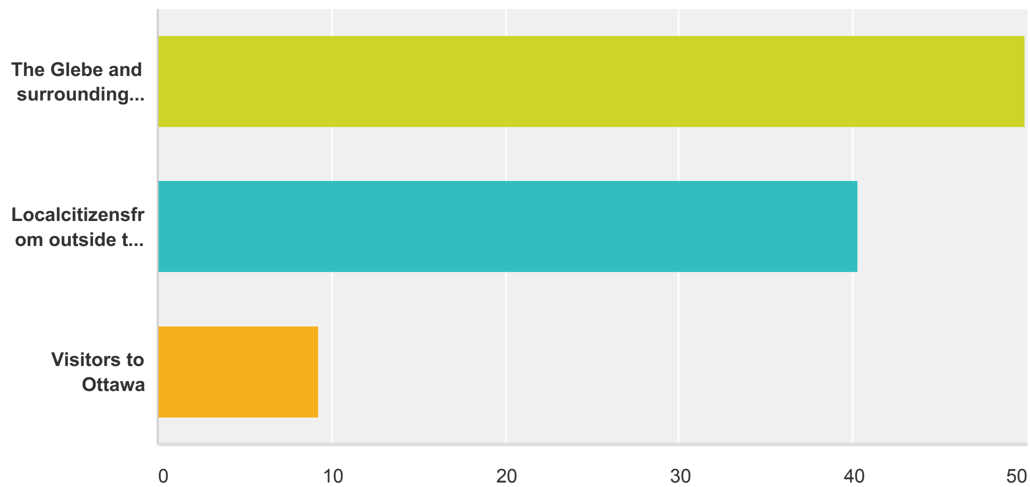
Answered: 37 Skipped: 12



Answer Choices	Responses	
No	**56.76%**	21
Yes,please specify the additional amount paid per square foot.	**43.24%**	16
Total		**37**

Q7 Approximately what percentage of your customers come from each of the following three categories?

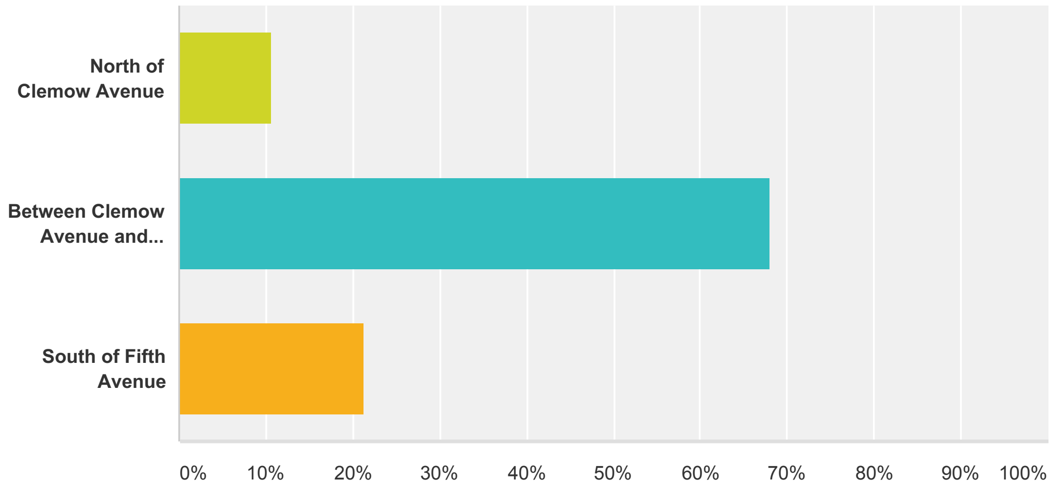
Answered: 42 Skipped: 7



Answer Choices	Average Number	Total Number	Responses
The Glebe and surrounding neighbourhoods	50	2,096	42
Localcitizensfrom outside the immediate area	40	1,694	42
Visitors to Ottawa	9	343	37
Total Respondents: 42			

Q8 Where is your business located within the Glebe?

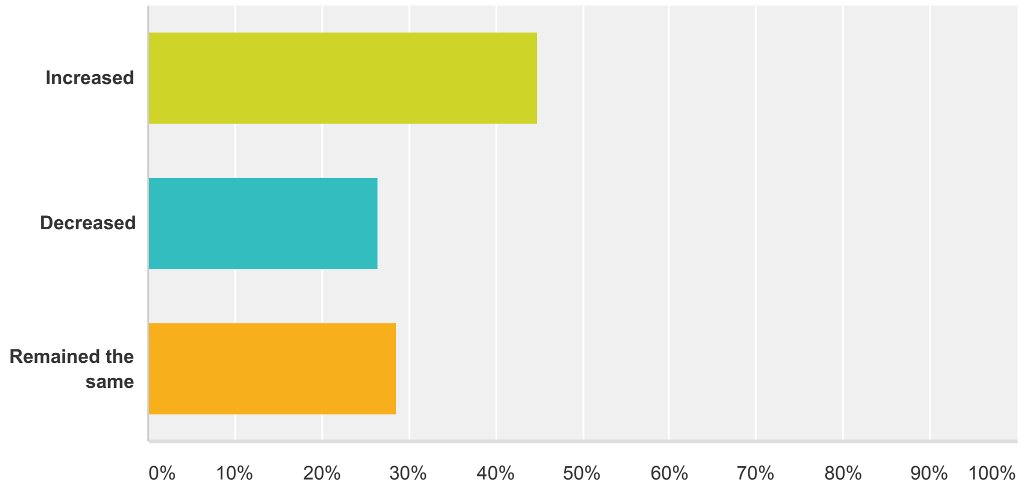
Answered: 47 Skipped: 2



Answer Choices	Responses	
North of Clemow Avenue	**10.64%**	5
Between Clemow Avenue and Fifth Avenue	**68.09%**	32
South of Fifth Avenue	**21.28%**	10
Total		**47**

Q9 In your experience, how has foot traffic changed over the past year?

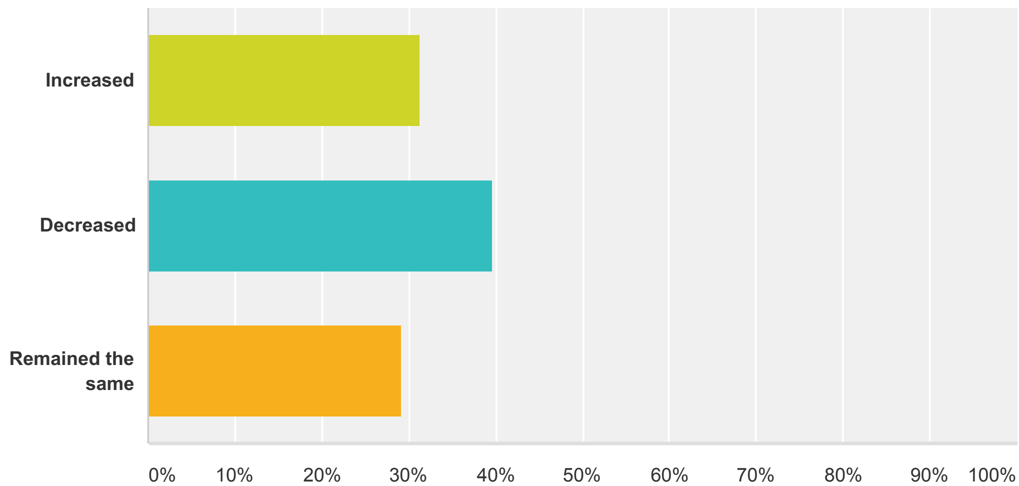
Answered: 49 Skipped: 0



Answer Choices	Responses	
Increased	**44.90%**	22
Decreased	**26.53%**	13
Remained the same	**28.57%**	14
Total		**49**

Q10 In your experience, how have your sales changed over the past year?

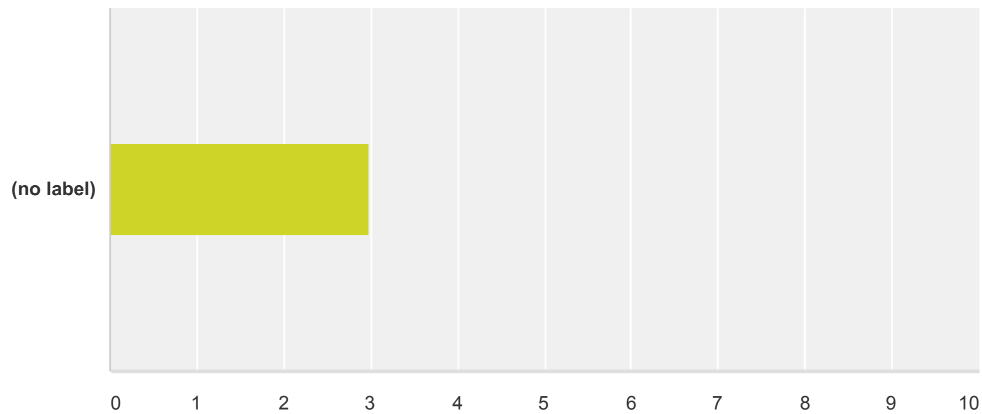
Answered: 48 Skipped: 1



Answer Choices	Responses	
Increased	**31.25%**	15
Decreased	**39.58%**	19
Remained the same	**29.17%**	14
Total		**48**

Q11 How would you rate the Glebe's current level ofcachet or positive standing?

Answered: 49 Skipped: 0



	Poor	Fair	Good	Very Good	Excellent	Total	Weighted Average
(no label)	**6.12%** 3	**24.49%** 12	**40.82%** 20	**22.45%** 11	**6.12%** 3	49	2.98