Robin Dee & Associates
REAL ESTATE COUNSELORS & ECONOMISTS

# SUPERMARKET DEMAND AND IMPACT EVALUATION

## 1761 WONDERLAND ROAD NORTH
## NORTHWEST LONDON
## ONTARIO

**Prepared for:**
**1830145 Ontario Limited**
**(c/o York Development Group)**

**April 25, 2012**

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*Robin Dee & Associates*
REAL ESTATE COUNSELORS & ECONOMISTS

April 25, 2012

Mr. Ali Soufan
York Development Group
233 Horton Street
London, Ontario
N6B 1L1.

Dear Mr. Soufan:

Re:
Supermarket Demand and Impact Study
1761 Wonderland Road North
London, Ontario

I am pleased to submit my report examining the market support and impact evaluation for the development a major food store (Supermarket) of approximately 40,000 square feet at 1761 Wonderland Road North in the City of London.

Our study included extensive original research in the form of a licence plate survey at the northeast corner of Fanshawe Park Road West and Wonderland Road North to assist in defining an appropriate Study Area for the project, an inventory of existing food oriented retail (FOR) space in the defined Study Area, and a random telephone survey within the Study Area to document the current shopping patterns by major FOR category of Study Area residents.

The approach employed in the study initially is a residual analysis providing estimates of warranted additional supermarket space in the Primary Study Area (PSA) beginning in 2013. Since the amount of supermarket space proposed exceeds the initial estimates of warranted additional supermarket space, the residual analysis is followed by a directional impact analysis in which the impact of the proposed entry of the supermarket at the subject site on each existing supermarket in the PSA is individually evaluated.

Our analysis revealed that the current (2011) performance of the seven existing supermarket operations in the PSA averages some $683 per square foot per annum. Compared with the industry norm of %500 to $550 per square foot, the PSA average performance is

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indicative of a local market that is understored and is lacking in competition.

The directional impact analysis shows that in 2013, the assumed first full year of operation of the proposed supermarket at the subject site, negative impacts on existing supermarkets are at their highest and thereafter decline as the market continues to grow. At no time, however, is the "after impact" performance level of any of the existing supermarkets reduced to a point where, in my professional opinion, there is a risk of closure. With no risk of closures, there is no potential adverse impact on the planned function of the retail structure in the PSA.

In light of the foregoing analysis and the resultant findings we believe it will be in the best interests of the residents of northwest London for the City to approve the OPA and zoning amendments requested for the subject site and thereby pave the way for a more competitive food store market environment in that sector of the City.

Yours truly,

Robin Dee
*Robin Dee & Associates*

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# SECTION 1
## INTRODUCTION

This report, dated April 25, 2012, has been prepared for 1830145 Ontario Limited. It examines the market support and opportunity for the development of a major food store (supermarket) of approximately 40,000 square feet at 1761 Wonderland Road North in the City of London, Ontario.

The site is located on the west side of Wonderland Road North just north of Fanshawe Park Road West. The subject lands are vacant save for an unoccupied single detached dwelling and a detached garage remaining on site.

Commercial development surrounds the site in the form of RWAM Insurance Company and Bell Canada facilities to the north, the former Michael Roberts Furniture Store to the south, the London Toy Shoppe at the rear of the site, and a commercial plaza across Wonderland Road North on the east side containing various stores including Shoppers Drug Mart and a No Frills supermarket.

1830145 Ontario Limited has applied to amend the Official Plan designation of the subject site from "Office Area" to "Neighbourhood Commercial Node" and to change the existing zoning from a "Holding Restricted Office (h-17*RO2) Zone to a "Holding Neighbourhhood Shopping Area Special Provision (h-17*h-103*h-()*NSA5()) Zone to add a "Supermarket" to the list of permitted uses with a maximum total gross floor area of 3,600 m2.

Since the proposed development at 1761 Wonderland Road North will effectively expand the Neighbourhood Commercial Node at Fanshawe Park Road West and Wonderland Road North, Policy 4.3.10 of the Official Plan, which deals with proposed expansions of Commercial Nodes, applies and has to be addressed. Policy 4.3.10 states that major expansions to existing nodes or the creation of new nodes will require an amendment to the Official Plan. Evaluation of such an amendment shall consider amongst other factors:

- Completion of a commercial justification report, which addresses the availability of other designated lands to accommodate the uses proposed, the effect of the change in designation on the supply of commercial lands; and to determine the need for new commercial floor space in this area.

Given that the proposed development represents the opportunity to consolidate an existing commercial node, it is eminently suited to the development of a major food store facility.

## 1.1 METHODOLOGY AND REPORT FORMAT

The approach employed in the study is similar to that used by the consultant in scores of retail studies throughout Ontario over many years. As such, the analysis considers the parameters of Food Oriented Retail (FOR) and Supermarket expenditure potential growth in a defined Study Area, examines the share of the Supermarket potential accruing to the Primary Study Area (PSA) surrounding the site today in 2011 and in the future at selected dates out to the year 2021, makes adjustments for inflow of sales into the PSA from households outside the defined Study Area, and determines the total sales potential in the PSA. This provides the basis for identifying the residual sales potential in the PSA (i.e. the increment in sales above the base year 2011 estimate) and the amount of additional retail space warranted in the PSA in the future without any sales transfers from the existing sales base of current supermarket operators in the PSA. The warranted space estimates provide a measure of the expected ease of entry for a new supermarket into the local northwest London market without resulting in any impact on the sales of existing supermarket operations in the PSA. Where the amount of space proposed for the subject site is equal to or less than the estimated warranted additional space, the conclusion drawn is that there will be no adverse impact on existing retail operations in the PSA. Where the amount of space proposed at the subject site exceeds the estimated warranted additional space, adverse impact on the operations of existing supermarkets can be expected. Whether the impact is judged to be critical (i.e. posing the risk of closure of existing supermarket space) is not measured simply by the percentage drop in sales. Rather it will depend on whether the impact reduces sales performance of existing supermarkets below a viable level and the duration of that impact.

Much of the statistical background material contained in this report is based on federal, provincial, regional and local statistics.

The detailed analysis is presented in a series of tables at the end of the report text (following page 15) and supplemented by further materials in the attached appendices. The report text throughout is referenced, as appropriate, to these analytical tables.

## 1.2 ASSUMPTIONS

In any analysis requiring estimates of future conditions, it is necessary to make certain assumptions. The basic or underlying assumptions in this study are set out below. Other assumptions are noted at appropriate points in the study text and tables.

1. We assume that over the forecast period to the year 2021 a reasonable degree of economic growth and stability will prevail in Canada, Ontario, and specifically the City of London and environs.

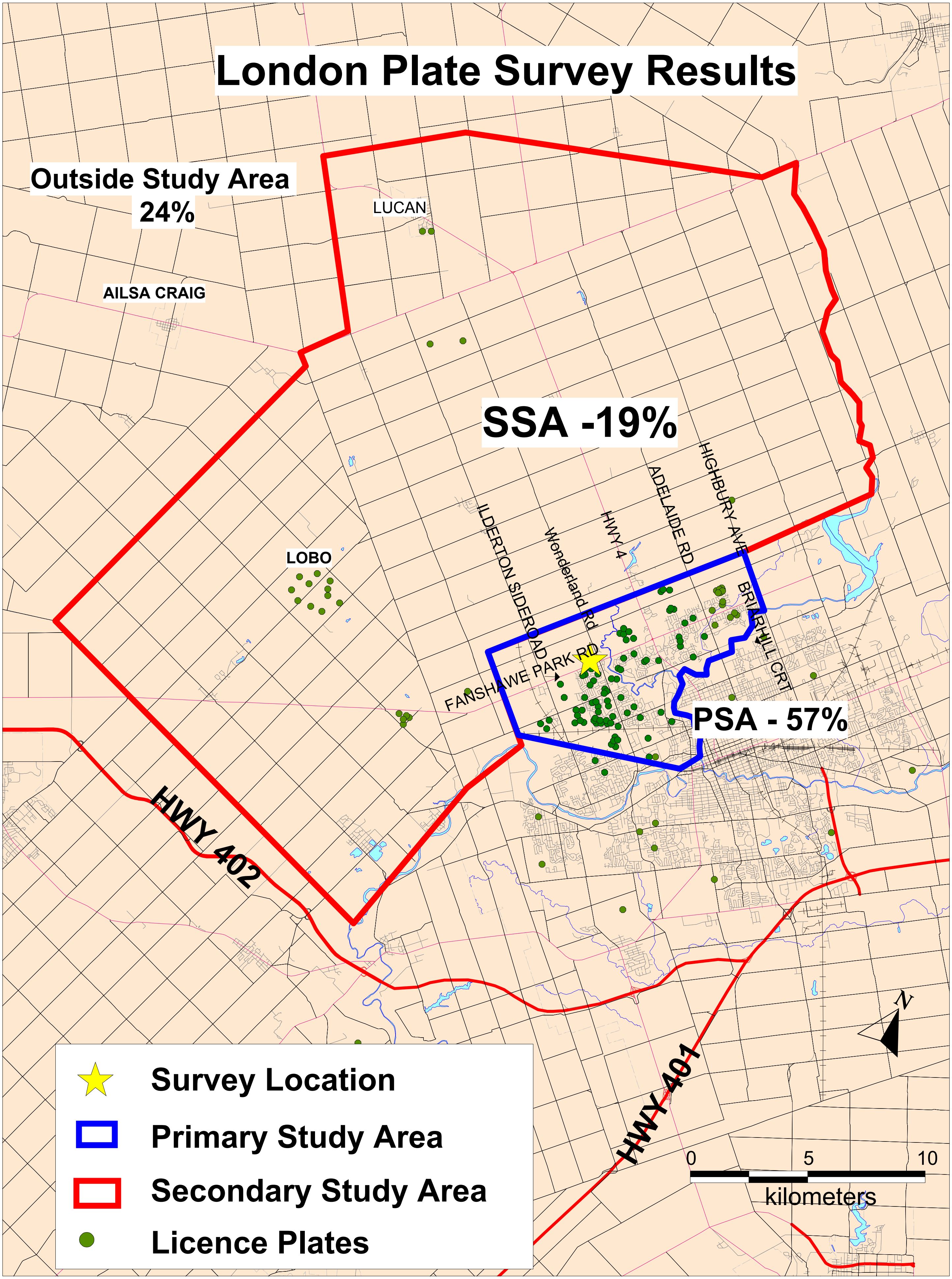
2. The estimates of future population in the defined Study Area are reasonable and will not vary significantly from actual counts recorded in the future.

3. The various data sources employed to develop figures on population, income, FOR per capita expenditures, the base year Study Area supermarket space inventory, and the base year sales performance level for existing supermarket facilities in the PSA, are considered sufficiently reliable for the purposes of this assignment.

4. All dollar references are in terms of the 2011 value of the Canadian dollar. Inflation is factored out of the analysis and only real increases in retail expenditures are recognized.

If for any reason there is a major departure from any of these assumptions, it may be necessary to re-examine the study findings and conclusions.

# London Plate Survey Results



# SECTION 2
## THE STUDY AREA

The geographic area from which a proposed retail/wholesale outlet can be expected to draw the majority of its sales support, typically 75+%, may be defined as the area of influence, the market area, the trade area, or the study area. This area will be determined by such factors as:

1) nature of the retail/wholesale facilities;

2) relative location and nature of any competing facilities in adjacent markets;

3) natural, man-made, and psychological barriers to the movement of goods and shoppers across the landscape; and

4) accessibility and driving times to/from the subject retail/wholesale facilities.

In this report, we have defined a Study Area drawing on the results of a licence plate survey conducted outside the supermarket in the plaza on the northeast corner of Fanshawe Park Road West and Wonderland Road North, across the road from the subject site. The plaza contains a No Frills supermarket of approximately 38,000 square feet. It is, we believe, logical to assume that a major supermarket development on the subject site across the road from the existing development in the northeast corner of Fanshawe Park Road West and Wonderland Road North will have an area of influence or study area similar to that of the existing retail node.

In June 2011, approximately 180 licence plate numbers were collected over three days. The results were mapped and used to define a Study Area representing the area from which the proposed supermarket development on the subject site is expected to garner the majority of its sales support. The mapping of the licence plate survey results and the defined Study Area are shown on the map opposite. The Study Area is divided into two sub-areas:

The Primary Study Area (PSA) is the area within which the proposed development will receive the major portion of its sales support. It is the area within which it will therefore exert the greatest influence on the expenditure patterns of local residents and the area within which it has the greatest potential to impact the operations of existing supermarkets. The PSA is essentially bounded on the east by Highbury Avenue and to the south by the Thames River and the CN Railway line. To the north and to the west, the boundaries are formed by the City of London boundary.

The Secondary Study Area (SSA) includes:

- All of Middlesex Centre Township with the exception of the area south of the Thames River in the west,
- All of Lucan Biddulph Township South of McGillivary/Breen Roads,
- Thames Centre Township west of the Thames River.

As noted on the Licence Plate Results map, the defined Study Area accounted for some 76% of the plates surveyed at the Fanshawe Park Road/Wonderland Road North retail node. The conclusion typically drawn from this result is that about a quarter of the sales at that retail node emanate from outside the boundaries of the Study Area. These non-Study Area based sales are defined in this study as "Inflow Sales".

# SECTION 3
# MARKET ANALYSIS

In this section of the report, we examine in detail the current and future FOR sales potential in the Study Area and the additional supermarket space warranted in the Primary Study Area over and above the current inventory.

## 3.1 STUDY AREA EXISTING SUPERMARKET SPACE INVENTORY

Where Study Area residents spend their retail dollars is very much a function of the opportunities available to them. Specifically, the location and mix of retail facilities available within and outside Study Area will be important factors shaping their shopping patterns.

The results of a detailed inventory of food store facilities in the Study Area compiled this past summer are presented in Appendix A. Summaries of the inventory are provided in Tables A1 and A2.

Table A1 provides a summary of Study Area FOR space by Study Area Zone, split between Supermarkets and Specialty Food Stores. Total FOR space in the Study Area amounts to 373,500 square feet with supermarkets accounting for 313,900 square feet (84% of Total FOR space). In the PSA, total FOR space amounts to 346,700 square feet, most of which is occupied by supermarkets (300,400 square feet). Total FOR space in the SSA amounts to 26,800 square feet split almost evenly between supermarkets and specialty food stores.

Table A2 lists the supermarkets in the Study Area by zone. In the PSA, there are 7 supermarkets in operation: 2 Metro supermarkets, and 1 each of No Frills, Sobeys, Loblaws Great Food, Unger's Market and Walmart (the food store component of a Walmart Supercentre). These supermarkets range in size from as low as 6,600 square feet for Unger's Market up to over 80,000 square feet for the Loblaws Great Food store.

## 3.2 VACANT DESIGNATED LANDS IN PSA PERMITTING A SUPERMARKET

There are 8 areas in the PSA with Official Plan designations that permit the development of a supermarket. They are identified in the following Chart compiled in September 2011:

| Commercial Study Analysis (MHBC file 1094'F') | | | | | | |
|---|---|---|---|---|---|---|
| Areas with Official Plan designations which permit "Supermarket" | | | | | | |
| Area ID | Location | Designation | Total Area of Designation | | Total Undeveloped Area | |
| | | | ha. | ac. | ha. | ac. |
| 1 | Fanshawe Park Rd @ Richmond St. (Masonville area) | Enclosed Regional Commercial Node | 39.703 ha. | 98.10 ac. | 0 ha. | 0 ac. |
| 2 | Fanshawe Park Rd. W. @ Hyde Park Rd. | New Format Regional Commercial Node | 50.361 ha. | 124.44 ac. | 8.670 ha. | 21.42 ac. |
| 3 | Richmond St. @ Sunningdale Rd. W. | Community Commercial Node | 9.437 ha. | 23.32 ac. | 9.437 ha. | 23.32 ac. |
| 4 | Fanshawe Park Rd. E. @ Adelaide St. N. | Community Commercial Node | 6.487 ha. | 16.03 ac. | 0 ha. | 0 ac. |
| 5 | Fanshawe Park Rd. E. @ Highbury Ave N. | Community Commercial Node | 10.452 ha. | 25.82 ac. | 10.452 ha. | 25.82 ac. |
| 6 | Wonderland Rd. N. @ Gainsborough Rd. (Sherwood Forest Mall area) | Community Commercial Node | 7.999 ha. | 19.76 ac. | 0 ha. | 0 ac. |
| 7 | Wonderland Rd. N. @ Oxford St. W. | Community Commercial Node | 9.049 ha. | 22.36 ac. | 0.181 ha. | 0.44 ac. |
| 8 | Oxford St. W. @ Cherryhill Blvd. (Cherryhill area) | Community Commercial Node | 5.452 ha. | 13.47 ac. | 0 ha. | 0 ac. |
| Total | | | 138.940 ha. | 343.3 ac. | 28.74 ha. | 71.0 ac. |

There are 3 areas that have undeveloped lands in excess of 20 acres (Areas 2,3 and 5) and 1 with less than .5 acre (Area 7), which would be insufficient to accommodate a supermarket of approximately 40,000 square feet. The vacant lands in Area 2 are part of the New Format Regional Node that contains the Walmart Supercentre with its supermarket component. On the western fringe of the PSA, these lands are unlikely to attract another supermarket to compete head-on with the "Walmart" banner. The vacant lands in Areas 3 and 5 are part of undeveloped Community Commercial Nodes located on the residential fringes of the PSA that have yet to attract sufficient residential development to support development of the designated Community Commercial Nodes. Development of the proposed supermarket on the subject lands on Wonderland Road North will not undermine the development and the planned function of the Community Commercial Nodes in Areas 3 and 5 given the distance removed from the subject lands.

## 3.3 STUDY AREA CURRENT RETAIL SHOPPING PATTERNS

A key task in the determination of future retail space needs and opportunities in the PSA is identifying the current shopping patterns of Study Area residents. "Capture rates" in this study are defined as the share of retail expenditure potential in the hands of Study Area residents, which in fact accrues to or is captured by facilities located within the PSA. The portion of retail potential spent beyond the boundaries of the Study Area is defined as "outflow". The converse of outflow is "inflow", defined as the portion of total sales recorded by facilities located in the PSA that in fact comes from non Study Area residents. Future retail space opportunities in the PSA will be a function not only of population growth and real increases in per capita expenditures within the Study Area but also the extent to which current PSA capture rates within the two sectors of the Study Area can reasonably be expected to increase in future, and the extent to which current inflow rates are expected to also increase in the future.

In order to obtain a measure of current base year FOR capture rates in the PSA and thereby provide a point of departure for evaluating the prospects of increasing future PSA capture, a Study Area wide random telephone survey was conducted in the summer of 2011. Some 200 residents in the PSA and 100 residents in the SSA were randomly selected and surveyed in accordance with standard practice to identify their current FOR shopping patterns. A copy of the survey questionnaire and summary results are included in Appendix B.

### 3.4 STUDY AREA POPULATION FORECAST (TABLE 1)

Table 1 sets out the population forecast for the Study Area from 2006 at selective intervals through to 2021. In 2011, the base year selected for the market analysis, total Study Area population, based on 2011 Census data, is estimated at some 108,354 persons distributed 89,809 in the PSA, and 18,545 in the SSA. In 2013, which is assumed to be the earliest full year of operation for any major food store development on the subject site, population in the Study Area is estimated at 113,200 residents, a growth rate of a little over 2,400 persons per year most of which is projected to occur in the PSA. Beyond 2013, the year 2015 is selected for detailed analysis providing a short-term perspective on the growth of the retail market in the Study Area to support the proposed supermarket at the subject site. At that time, total Study Area population is projected at some 117,723, the growth rate continuing at over 2,200 persons with the majority locating in the PSA. The years 2017 and 2021 provide respectively medium and longer-term perspectives on retail market growth in the Study Area. At the selected horizon year 2021, the total population in the Study Area is forecast to reach just over 129,100 persons, with some 107,529 in the PSA.

### 3.5 PER CAPITA INCOMES AND FOR EXPENDITURES (Tables 2A & 2B)

Expenditure by Study Area residents on FOR merchandise is a function in part of their incomes. To determine the relative income level in the Study Area, reference is made to the 2006 Census from which income data on a census subdivision and enumeration area basis can be extracted. We note in Table 2A that the relative per capita income indexes for the PSA and the SSA residents respectively are 110.6 and 109.0, both above the Ontario provincial average at 100.0. The income index is converted to relative FOR expenditure indexes in Table 2B by way of a regression equation. These expenditure indexes are then applied to the Ontario per capita FOR expenditure for 2011 based on Statistics Canada Retail Trade data to yield 2011 FOR expenditure estimates of $2,219 and $2,215 for PSA and SSA residents respectively.

### 3.6 STUDY AREA FOOD ORIENTED RETAIL (FOR) POTENTIAL (TABLE 3)

FOR potential in the Study Area, which is the simple product of population times per capita FOR expenditure, is presented in Table 3. Per capita expenditure factors have been extracted from Table 2 and projected forward over the forecast interval in constant 2011 dollars and applied to the population projection. In the base year 2011, total Study Area FOR potential amounts to an estimated $240.4 million and is projected to increase to nearly $294 million by 2021. The majority of the FOR potential in the Study Area (over 80%) is found in the PSA reflecting the weighting of PSA population in the Study Area.

## 3.7 PROJECTED PRIMARY STUDY AREA SUPERMARKET SALES AND WARRANTED ADDITIONAL SPACE (TABLE 4)

The projected Primary Study Area supermarket sales and the amount of additional supermarket space warranted in the future at selected forecast dates are presented in Table 4.

The base year Study Area Supermarket shares of FOR potential are based on the consumer telephone results. Beyond the base year, because the current shares at 88.4% and 88.6% in the PSA and SSA respectively are already at high levels, we anticipate only marginal increases in the Supermarket shares. The Supermarket Shares in both the PSA and the SSA are projected at 89% beyond 2011.

How much of the Supermarket potential in the Study Area in the base year is spent in the PSA is calculated by applying a PSA capture rate to the Supermarket potential estimate in each Study Area sector. Base year PSA capture rates for the respective Study Area sectors are derived from the in-home consumer telephone survey and set at 65.5% for the PSA and 73.8% for the SSA. Recognizing the apparent strength of the draw of existing London supermarkets located outside but in proximity to the PSA, we conservatively project modest increases in future PSA capture rates beyond the base year. The PSA Capture Rate is projected at 67.5%; in the SSA it is estimated at 75%.

The sum of the PSA capture in the PSA and the SSA represents total Primary Study Area Supermarket sales derived from Study Area residents only. Study Area based PSA Supermarket sales amount to some $142 million in 2011 and are forecast to reach nearly $180 million by 2021.

To the Study Area based sales we add an "Inflow Sales " factor to account for sales obtained from non Study Area residents. The 'Inflow Sales " factor is an estimate having regard to the results of the Licence Plate survey that was conducted in June 2011 and considering the inflows for individual PSA supermarkets.

Total Primary Study Area supermarket sales, including inflow sales, are estimated in the base year 2011 to amount to $205.2 million. By the end of the forecast period in 2021, total PSA supermarket sales are projected to rise to $256.6 million.

The increases in total PSA sales above the base year level are defined as "Residual Supermarket Sales" and are estimated at $15.4 million in 2013 rising to $51.5 million by 2021. Residual Sales are converted into estimates of warranted additional supermarket space in the PSA at selected forecast dates by dividing the residual sales by appropriate entry sales per square foot planning factors for new space. In Table 4, the highlighted estimated warranted additional Supermarket space in the PSA in 2013 is a little over 28,000 square feet. This figure increases to 45,800 square feet by 2015 and continues rising to 91,600 square feet by 2021.

### 3.8 PROJECTED PRIMARY STUDY AREA SPECIALTY FOOD STORE SALES AND WARRANTED ADDITIONAL SPACE (TABLE 5)

The projected Primary Study Area Specialty Food Store sales and the amount of additional Specialty Food Store space warranted in the future at selected forecast dates are presented in Table 5.

The format of Table 5 mirrors that of Table 4 and the sources of key inputs such as Specialty Food Store shares of FOR potential and PSA capture rates are the same as employed in Table 4.

Additional Specialty Food Store space in the PSA is not warranted until 2015 and then it is a very modest 1,260 square feet. This figure doubles by 2017 and continues rising to 4,600 square feet by 2021.

# SECTION 4

# PROPOSED DEVELOPMENT CONCEPT

# AND

# IMPACT EVALUATION

## 4.1 PROPOSED DEVELOPMENT CONCEPT

The method of analysis employed in this study is a residual analysis, that is to say, the warranted additional space estimates are based only on the sales in excess of the base year sales currently enjoyed by existing retailers in the PSA. By definition, therefore, if the amount of supermarket space introduced into the local PSA market is less than or equal to the estimated warranted additional supermarket space, there should be no concerns about impact on the sales, and hence viability, of existing PSA supermarkets. However, if the amount of supermarket introduced into the local PSA market exceeds the estimated warranted additional supermarket space, impact on the operations of existing supermarket operators will result.

The proposed development at the subject site is a supermarket with the total size of development according to the zoning requested set at 3,600 m2 or just over 38,000 square feet. A development of that order will exceed the warranted additional supermarket space in the PSA in 2013, the assumed first full year of operation of any such development at the subject site. As such, impacts on existing supermarket operations in the PSA can be expected. The magnitude and duration of any such impacts should be evaluated.

## 4.2 PRIMARY STUDY AREA CURRENT SUPERMARKET PERFORMANCE (TABLE 6)

The impact of a new entrant into a market is measured by comparing the sales performances of existing retail operators in the market before and after the entry takes place. In this study, the estimated current 2011 sales performance is adopted as the before entry benchmark against which impact is measured.

In Table 6, under Current Performance 2011, the analysis sets out for each PSA existing supermarket its size in square feet and the share that represents of total supermarket space in the PSA. For each supermarket, the share it captures of total PSA Study Area based supermarket sales is shown in percentage and dollar terms. These market shares of Study Area based supermarket sales are derived from the Study Area in-home consumer survey results. Inflow Sales are added to the Study Area based supermarket sales to yield estimates of total sales from all sources. The Inflow Sales factors are derived from consideration of the Licence Plate survey results combined with a regard for the location of each supermarket relative to the Study Area boundaries and the supermarket competition outside the Study Area. In my experience, the closer a supermarket is located to the Study Area boundary, the greater the reliance on sales from outside the Study Area and the higher the inflow sales factor.

Total sales estimated for each supermarket are divided by the size of each store to provide a measure of supermarket performance in the form of sales per square foot. As noted in Table 6, the estimated sales per square foot performance ranges from a low of $506 for the Metro supermarket on Oxford Street West at Cherryhill Blvd. to a high of $1,638 for the No Frills supermarket across the street from the subject site.

The current average sales performance of the existing supermarkets in the PSA is estimated at $683 per square foot. This is significantly higher than the industry norm of $500 to $550 per square foot. When the average performance level in the market is significantly higher than the industry norm, that is an indication of an excess of demand over supply, or a lack of competition. This is particularly evident in the estimated current sales performance of the No Frills discount supermarket across the street from the subject site. At an estimated $1,638 per square foot, the No Frills current performance is approximately 3 times higher than the industry norm and about 2.4 times higher than the PSA current average performance level. This very high current performance of the No Frills is traced to the market dominance it enjoys within the Study Area. The Study Area in-home consumer survey indicated that the No Frills captures some 34% of Study Area supermarket expenditures although it only occupies less than 13% of the total supermarket space in the PSA. No other supermarket in the PSA shows such a difference in market share of Study Area supermarket expenditures and share of total PSA supermarket space. The greatest need in the PSA retail structure is for additional discount supermarket competition.

## 4.3 PRIMARY STUDY AREA IMPACT EVALUATION (TABLE 6)

Impact occurs where the sales of existing retailers are reduced below base year levels upon entry of new facilities in the local market. As noted earlier, if the amount of new entry space is less than or equal to the warranted additional space based on residual sales over and above base year levels, there will be no impact concerns. Where there are impacts, their magnitudes and durations have to be considered before a determination can be made whether they are critical and therefore are likely to pose a risk of closure of existing retail operations and impair the planned function of the retail structure embodied in the Official Plan. In my professional experience, the magnitude of the impact has to exceed –10% and last more than two years before there is a concern raised as to whether the estimated impact is to be judged as critical.

Having regard to the mix of existing supermarket banners in the PSA and their respective current or base year performance levels prior to any entry of new competition on the subject site (as revealed in Table 6 and discussed above), in my professional judgement the type of new supermarket operation that will likely exert the greatest impact on any existing operator in the PSA will be a discount supermarket to go head to head with the No Frills discount supermarket operation across the street on the east side of Wonderland Road North. The estimated base year performance level for the No Frills at some $1638 per square foot we noted is far in excess of the industry norm of $500 to $550 per square foot and is a clear indication of a lack of competing discount supermarket facilities in the PSA. For analytical purposes, we conservatively assume a discount supermarket of some 40,000 square feet opens on the subject site with a first full year of operation occurring as early as 2013.

The details of a directional impact analysis for each existing supermarket in the PSA are presented in Table 6. In Table 6, the analysis for the forecast year 2013 includes the entry of a 40,000 square foot discount supermarket operation at the subject site. The format of the analysis is similar to the base year analysis with the addition of a line showing the resultant impact on base year sales performance of the new discount supermarket entry. Having regard to the sizes of the existing Sobeys at Fanshawe/Richmond and the Metro at Wonderland/Sherwood, both in the 40,000 square foot range, and their current market shares, given the similar size of the new supermarket but with a discount orientation, we estimate it could capture some 15% of total Study Area based supermarket sales. Two thirds of that market share we estimate will be at the expense of the No Frills supermarket across the street. The balance of the shift in market share to the new entrant will be borne by the Walmart supermarket component, the Loblaws Great Food store, and the Metro supermarket at Sherwood Forest Mall. While there may be impact on the market shares of the remaining supermarkets, it will, we believe, be too small to measure. As in the base year analysis, there is an addition of Inflow Sales to yield estimated Total Sales from all sources. Comparing Total Sales in 2013 with Total Sales in 2011 provides a measure of the impact, positive or negative, that the new supermarket entrant is expected to have on existing operators.

In 2013, the greatest adverse impact is projected to fall on the No Frills operation across the street and measures -23.5%. Adverse impacts are also shown for the Walmart, the Loblaws Great Food store, and the Metro supermarket in Sherwood Forest Mall, all of which are less than -5.5%. For the remaining PSA supermarkets, Total Sales show positive increases reflecting overall total supermarket sales growth in the PSA.

It was noted earlier that where the impact exceeds -10% and endures for more than 2 years, it typically raises a concern that the impact may be critical leading to store closures and thereby impairing the planned function of the retail structure. In Table 6, it is noted that the only existing supermarket in the PSA projected to incur a negative impact much beyond 2013 is the No Frills store. In fact the negative impact on the No Frills operation is projected to prevail beyond 2021. However, before concluding that the impact by virtue of its magnitude and duration is critical, we have to look at the absolute sales per square foot performance projected for the No Frills store after impact. In 2013, when the impact is greatest, the "after impact" performance of the No Frills is over $1,250 per square foot, nearly twice the sales performance of the projected new discount supermarket entrant at the subject site and more than twice as high as the supermarket norm of around $500 to $550 per square foot. At such a level of "after impact" sales performance there is no risk of the No Frills supermarket closing due to the emergence of a competing discount supermarket across the street.

## SECTION 5

## CONCLUSION

We have examined the market demand for additional supermarket space in the PSA and found that, due to a lack of competition, the existing No Frills discount supermarket at Fanshawe Park Road West and Wonderland Road North is at present enjoying a sales per square foot performance level that is nearly 3 times the industry norm. We have tested the expected impact of introducing a 40,000 square foot discount supermarket operation on the site at 1761 Wonderland Road North across the street from the No Frills supermarket. A supermarket of that size and type is likely to impose the highest impact of any type of supermarket on existing supermarkets in the local market area (a worst case scenario). Specifically, impact on the No Frills discount supermarket across the street from the 1761 Wonderland Road North site is estimated to exceed -20% and remain negative beyond 2021. However, because the No Frills store currently enjoys far above average sales per square foot performance, it can absorb a -20% impact and still achieve a sales performance level that is well above average. Accordingly, the No Frills at Fanshawe/Wonderland is not at risk of closing due to increased competition.

As noted in the Specialty Food Store analysis in Table 5, the projected entry of a major supermarket into the local PSA FOR market is not expected to have any material impacts on PSA total Specialty Food Store sales and hence no risk of closures.

Viewed in the context of all the designated retail commercial land in the Study Area, the subject site will represent a very small fraction.

In light of the foregoing analysis and the resultant findings we believe it will be in the best interests of the residents of northwest London for the City to approve the OPA and zoning amendments requested for the subject site and thereby pave the way for a more competitive food store market environment in that sector of the City.

**TABLE 1: STUDY AREA POPULATION PROJECTION**

| | 2006 | 2011 | 2013 | 2015 | 2017 | 2021 |
|---|---|---|---|---|---|---|
| Primary Study Area | 74,837 | 89,809 | 94,104 | 98,075 | 102,047 | 107,529 |
| Interval Increase | | 14,972 | 4,295 | 3,971 | 3,972 | 5,482 |
| Per Year | | 2,994 | 2,148 | 1,986 | 1,986 | 1,371 |
| Secondary Study Area | 17,367 | 18,545 | 19,096 | 19,648 | 20,258 | 21,593 |
| Interval Increase | | 1,178 | 551 | 552 | 610 | 1,335 |
| Per Year | | 236 | 276 | 276 | 305 | 334 |
| **Total Study Area** | **92,204** | **108,354** | **113,200** | **117,723** | **122,305** | **129,122** |
| **Interval Increase** | | **16,150** | **4,846** | **4,523** | **4,582** | **6,817** |
| **Per Year** | | **3,230** | **2,423** | **2,262** | **2,291** | **1,704** |

Sources: AMB Research

- 2011 Census of Canada, adjusted for undercount at 2.9%
- Building Activity: Low Medium, High density units by Planning District, provided by John Paul Sousa
- City of London Recommended Growth Management Implementation Strategy- Approach, Principle and Proposed Works, City of London Planning Division, June 4 2008.
- 2006 Official Plan Review - Land Needs Background Study, City of London Planning Division, May 14, 2007.
- Citywide Projections based on Clayton Research (Sept. 2006). Employment, Population, Housing and Non-Residential Construction Projections, City of London, Ontario,2006 Update and Altus Clayton (August 2007). Update.
- Allocations to Planning Districts by City of London Planning Division, Policy Section based on the June 1, 2007 Residential Vacant Land Inventory and Assumptions used in the Official Plan Review, Land Needs Background Study (2007).
- Municipality of Middlesex Centre Amendment re Comprehensive Review of Settlement Area Designations and Komoka-Kilworth Secondary Plane, June 1, 2011.
- Municipality of Middlesex Official Plan, June, 2010.

## TABLE 2A: STUDY AREA PER CAPITA INCOME INDEXES

| | Average Household Income 2006 Census | Average Persons Per Unit | Average Per Capita Income | Per Capita Income Index |
|---|---|---|---|---|
| Ontario | $77,967 | 2.6 | $29,987 | 100.0 |
| Primary Study Area | $79,604 | 2.4 | $33,168 | 110.6 |
| Secondary Study Area | $94,810 | 2.9 | $32,693 | 109.0 |

Source: Census of Canada 2006.

## TABLE 2B: STUDY AREA PER CAPITA FOOD STORE RELATED (FOR) EXPENDITURE

| | Income | FOR | |
|---|---|---|---|
| 2011 | Index | Index | Expenditure |
| Ontario | 100.0 | 100.0 | $2,187.00 |
| Primary Study Area | 110.6 | 101.5 | $2,219.46 |
| Secondary Study Area | 109.0 | 101.3 | $2,214.56 |

Notes: Ontario per capita expenditures based on Statistics Canada Cat.#63005X Retail Trade December 2009. Expenditure indexes based on regression analysis of relevant components of the Stats Canada 2008 Households Spending Survey for Ontario: FOR Index = (0.14 x Income Index) + 86.

**TABLE 3**
**STUDY AREA FOOD ORIENTED RETAIL (FOR) POTENTIAL**

| 2011$ | 2011 | 2013 | 2015 | 2017 | 2021 |
|---|---|---|---|---|---|
| **Primary Study Area** | | | | | |
| Per Capita FOR Expenditures* | $2,219.46 | $2,230.57 | $2,241.73 | $2,252.96 | $2,275.57 |
| Population** | 89,809 | 94,104 | 98,075 | 102,047 | 107,529 |
| FOR Potential ($ Millions) | $199.327 | $209.905 | $219.858 | $229.907 | $244.690 |
| | | | | | |
| **Secondary Study Area** | | | | | |
| Per Capita FOR Expenditures* | $2,214.56 | $2,225.64 | $2,236.78 | $2,247.98 | $2,270.55 |
| Population** | 18,545 | 19,096 | 19,648 | 20,258 | 21,593 |
| FOR Potential ($ Millions) | $41.069 | $42.501 | $43.948 | $45.540 | $49.028 |
| **TOTAL STUDY AREA FOR POTENTIAL ($ Millions)** | **$240.396** | **$252.406** | **$263.806** | **$275.447** | **$293.718** |

Source: RDA estimates
* See Table 2. Beyond 2011, per capita expenditure real increase is 0.25% per annum compounded.
** See Table 1

**TABLE 4**
**PROJECTED PRIMARY STUDY AREA SUPERMARKET SALES AND WARRANTED ADDITIONAL SPACE**

| 2011 $ | | | 2011 | 2013 | 2015 | 2017 | 2021 |
|---|---|---|---|---|---|---|---|
| **Primary Study Area** | | | | | | | |
| FOR Expenditure Potential* | | | $199.327 | $209.905 | $219.858 | $229.907 | $244.690 |
| Supermarket Share: | | | | | | | |
| | @ | 88.4% ** | $176.205 | | | | |
| | @ | 89.0% | | $186.816 | $195.674 | $204.618 | $217.774 |
| Primary Study Area Capture | | | | | | | |
| | @ | 65.5% *** | $115.414 | | | | |
| | @ | 67.5% | | $126.101 | $132.080 | $138.117 | $146.997 |
| **Secondary Study Area** | | | | | | | |
| FOR Expenditure Potential* | | | $41.069 | $42.501 | $43.948 | $45.540 | $49.028 |
| Supermarket Share: | | | | | | | |
| | @ | 88.6% ** | $36.387 | | | | |
| | @ | 89.0% | | $37.826 | $39.114 | $40.530 | $43.635 |
| Primary Study Area Capture | | | | | | | |
| | @ | 73.8% *** | $26.854 | | | | |
| | @ | 75.0% | | $28.369 | $29.336 | $30.398 | $32.726 |
| **Primary Study Area Sales Without Inflow** | | | **$142.268** | **$154.470** | **$161.415** | **$168.515** | **$179.724** |
| **Plus Inflow Sales:** | | | | | | | |
| | @ | 30.7% **** | $62.888 | | | | |
| | @ | 30.0% | | $66.115 | $69.087 | $72.126 | $76.923 |
| **TOTAL PRIMARY STUDY AREA SUPERMARKET SALES** | | | **$205.156** | **$220.585** | **$230.502** | **$240.640** | **$256.647** |
| **RESIDUAL SUPERMARKET SALES** | | | **$0.000** | **$15.428** | **$25.346** | **$35.484** | **$51.490** |
| **WARRANTED ADDITIONAL SUPERMARKET SPACE:** | | | | | | | |
| | @ | **$550 Per Sq.ft.** | | **28,051** | **46,084** | **64,516** | **93,619** |
| | @ | **$553 Per Sq.ft.** | | **27,899** | **45,834** | **64,166** | **93,111** |
| | @ | **$555 Per Sq.ft.** | | **27,798** | **45,669** | **63,935** | **92,776** |
| | @ | **$562 Per Sq.ft.** | | **27,452** | **45,100** | **63,139** | **91,620** |

Source: RDA estimates

* See Table 3

** Base year supermarket share derived from Study Area consumer telephone survey. Beyond 2011, supermarket shares are RDA estimates.

*** Base year capture rate derived from Study Area consumer telephone survey. Beyond 2011, capture rates are RDA estimates.

**** Derived from Licence Plate survey and estimated inflows for individual supermarkets in Study Area having regard to supermarket competition outside Study Area.

**TABLE 6: PRIMARY STUDY AREA: CURRENT SUPERMARKET PERFORMANCE AND IMPACT ANALYSIS**

| 2011 $ | | Metro Oxford St./ Platt's Lane | No Frills Fanshawe/ Wonderland | Ungers Mkt. Hyde Park Road | Loblaws Fanshawe/ Richmond | Sobeys Fanshawe/ Adelaide | Metro Wonderland/ Sherwood | Walmart Fanshawe/ Stanton | Proposed Fanshawe/ Wonderland | TOTAL PRIMARY STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| **CURRENT PERFORMANCE :** | **2011** | | | | | | | | | |
| Supermarket Space | Square Feet | 30,000 | 38,000 | 6,600 | 82,000 | 43,800 | 40,000 | 60,000 | N/A | 300,400 |
| | Distribution | 10.0% | 12.6% | 2.2% | 27.3% | 14.6% | 13.3% | 20.0% | N/A | 100.0% |
| Study Area Based Sales* | Mkt. Share | 3.2% | 33.9% | 3.4% | 22.0% | 14.3% | 5.9% | 17.3% | N/A | 100.0% |
| | ($ Millions) | $4.553 | $48.229 | $4.837 | $31.299 | $20.344 | $8.394 | $24.612 | N/A | $142.268 |
| Inflow Sales** | % | 70.0% | 22.5% | 5.0% | 25.0% | 25.0% | 60.0% | 25.0% | N/A | 30.7% |
| | ($ Millions) | $10.623 | $14.002 | $0.255 | $10.433 | $6.781 | $12.591 | $8.204 | N/A | $62.888 |
| **Total Sales** | **($Millions)** | **$15.175** | **$62.231** | **$5.092** | **$41.732** | **$27.126** | **$20.985** | **$32.816** | **N/A** | **$205.156** |
| **Performance** | **$/Sq.Ft** | **$506** | **$1,638** | **$771** | **$509** | **$619** | **$525** | **$547** | **N/A** | **$683** |
| **2013** | | | | | | | | | | |
| Supermarket Space | Square Feet | 30,000 | 38,000 | 6,600 | 82,000 | 43,800 | 40,000 | 60,000 | 40,000 | 340,400 |
| | Distribution | 8.8% | 11.2% | 1.9% | 24.1% | 12.9% | 11.8% | 17.6% | 11.8% | 100.0% |
| Study Area Based Sales* | Mkt.Share | 3.2% | 23.9% | 3.4% | 19.7% | 14.3% | 5.4% | 15.1% | 15.0% | 100.0% |
| | ($Millions) | $4.943 | $36.918 | $5.252 | $30.431 | $22.089 | $8.341 | $23.325 | $23.170 | $154.470 |
| Inflow Sales** | % | 70.0% | 22.5% | 5.0% | 25.0% | 25.0% | 60.0% | 25.0% | 20.0% | 30.0% |
| | ($Millions) | $11.534 | $10.718 | $0.276 | $10.144 | $7.363 | $12.512 | $7.775 | $5.793 | $66.115 |
| **Total Sales** | **($Millions)** | **$16.477** | **$47.637** | **$5.528** | **$40.574** | **$29.452** | **$20.853** | **$31.100** | **$28.963** | **$220.585** |
| **Performance** | **$/Sq.Ft** | **$549** | **$1,254** | **$838** | **$495** | **$672** | **$521** | **$518** | **$724** | **$648** |
| **Impact on Base Year Sales** | | **8.6%** | **-23.5%** | **8.6%** | **-2.8%** | **8.6%** | **-0.6%** | **-5.2%** | **N/A** | **7.5%** |
| **2015** | | | | | | | | | | |
| Supermarket Space | Square Feet | 30,000 | 38,000 | 6,600 | 82,000 | 43,800 | 40,000 | 60,000 | 40,000 | 340,400 |
| | Distribution | 8.8% | 11.2% | 1.9% | 24.1% | 12.9% | 11.8% | 17.6% | 11.8% | 100.0% |
| Study Area Based Sales* | Mkt.Share | 3.2% | 23.9% | 3.4% | 19.7% | 14.3% | 5.4% | 15.1% | 15.0% | 100.0% |
| | ($Millions) | $5.165 | $38.578 | $5.488 | $31.799 | $23.082 | $8.716 | $24.374 | $24.212 | $161.415 |
| Inflow Sales** | % | 70.0% | 22.5% | 5.0% | 25.0% | 25.0% | 60.0% | 25.0% | 20.0% | 30.0% |
| | ($Millions) | $12.052 | $11.200 | $0.289 | $10.600 | $7.694 | $13.075 | $8.125 | $6.053 | $69.087 |
| **Total Sales** | **($Millions)** | **$17.218** | **$49.778** | **$5.777** | **$42.398** | **$30.776** | **$21.791** | **$32.498** | **$30.265** | **$230.502** |
| **Performance** | **$/Sq.Ft** | **$574** | **$1,310** | **$875** | **$517** | **$703** | **$545** | **$542** | **$757** | **$677** |
| **Impact on Base Year Sales** | | **13.5%** | **-20.0%** | **13.5%** | **1.6%** | **13.5%** | **3.8%** | **-1.0%** | **N/A** | **12.4%** |
| **2017** | | | | | | | | | | |
| Supermarket Space | Square Feet | 30,000 | 38,000 | 6,600 | 82,000 | 43,800 | 40,000 | 60,000 | 40,000 | 340,400 |
| | Distribution | 8.8% | 11.2% | 1.9% | 24.1% | 12.9% | 11.8% | 17.6% | 11.8% | 100.0% |
| Study Area Based Sales* | Mkt.Share | 3.2% | 23.9% | 3.4% | 19.7% | 14.3% | 5.4% | 15.1% | 15.0% | 100.0% |
| | ($Millions) | $5.392 | $40.275 | $5.729 | $33.197 | $24.098 | $9.100 | $25.446 | $25.277 | $168.515 |
| Inflow Sales** | % | 70.0% | 22.5% | 5.0% | 25.0% | 25.0% | 60.0% | 25.0% | 20.0% | 30.0% |
| | ($Millions) | $12.582 | $11.693 | $0.302 | $11.066 | $8.033 | $13.650 | $8.482 | $6.319 | $72.126 |
| **Total Sales** | **($Millions)** | **$17.975** | **$51.968** | **$6.031** | **$44.263** | **$32.130** | **$22.749** | **$33.928** | **$31.596** | **$240.640** |
| **Performance** | **$/Sq.Ft** | **$599** | **$1,368** | **$914** | **$540** | **$734** | **$569** | **$565** | **$790** | **$707** |
| **Impact on Base Year Sales** | | **18.4%** | **-16.5%** | **18.4%** | **6.1%** | **18.4%** | **8.4%** | **3.4%** | **N/A** | **17.3%** |
| **2021** | | | | | | | | | | |
| Supermarket Space | Square Feet | 30,000 | 38,000 | 6,600 | 82,000 | 43,800 | 40,000 | 60,000 | 40,000 | 340,400 |
| | Distribution | 8.8% | 11.2% | 1.9% | 24.1% | 12.9% | 11.8% | 17.6% | 11.8% | 100.0% |
| Study Area Based Sales* | Mkt.Share | 3.2% | 23.9% | 3.4% | 19.7% | 14.3% | 5.4% | 15.1% | 15.0% | 100.0% |
| | ($Millions) | $5.751 | $42.954 | $6.111 | $35.406 | $25.700 | $9.705 | $27.138 | $26.959 | $179.724 |
| Inflow Sales** | % | 70.0% | 22.5% | 5.0% | 25.0% | 25.0% | 60.0% | 25.0% | 20.0% | 30.0% |
| | ($Millions) | $13.419 | $12.470 | $0.322 | $11.802 | $8.567 | $14.558 | $9.046 | $6.740 | $76.923 |
| **Total Sales** | **($Millions)** | **$19.171** | **$55.424** | **$6.432** | **$47.207** | **$34.267** | **$24.263** | **$36.184** | **$33.698** | **$256.647** |
| **Performance** | **$/Sq.Ft** | **$639** | **$1,459** | **$975** | **$576** | **$782** | **$607** | **$603** | **$842** | **$754** |
| **Impact on Base Year Sales** | | **26.3%** | **-10.9%** | **26.3%** | **13.1%** | **26.3%** | **15.6%** | **10.3%** | **N/A** | **25.1%** |

Source: RDA estimates

* Base year market shares based on Study Area Consumer survey. Beyond 2011, estimates by RDA.

** Derived from Licence Plate survey and estimated inflows for individual supermarkerts in Study Area having regard to supermarket competition outside Study Area.

# APPENDIX A

## STUDY AREA DETAILED FOOD ORIENTED RETAIL INVENTORY

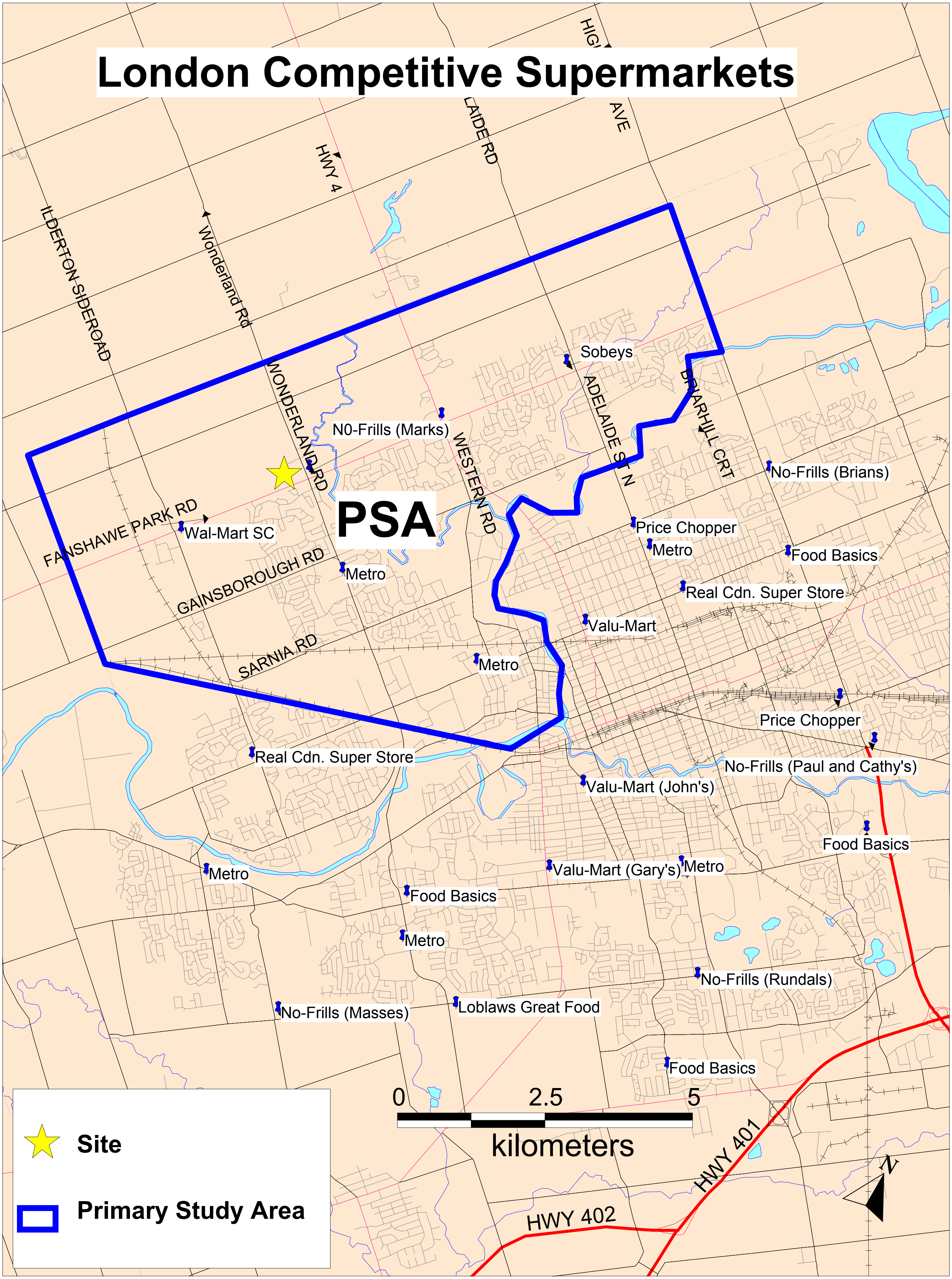

London Competitive Supermarkets
HWY 4
ILDERTON SIDEROAD
Wonderland Rd
WONDERLAND RD
WESTERN RD
ADELAIDE ST N
BRIARHILL CRT
FANSHAWE PARK RD
GAINSBOROUGH RD
SARNIA RD
PSA
Sobeys
N0-Frills (Marks)
No-Frills (Brians)
Wal-Mart SC
Price Chopper
Metro
Food Basics
Metro
Real Cdn. Super Store
Valu-Mart
Metro
Price Chopper
Real Cdn. Super Store
No-Frills (Paul and Cathy's)
Valu-Mart (John's)
Food Basics
Metro
Valu-Mart (Gary's)
Metro
Food Basics
Metro
No-Frills (Rundals)
No-Frills (Masses)
Loblaws Great Food
Food Basics
0
2.5
5
kilometers
HWY 401
HWY 402
N
Site
Primary Study Area

**TABLE A1: STUDY AREA FOOD ORIENTED RETAIL (FOR) SPACE**

| Retail Category | Primary Study Area | Secondary Study Area | Total Study Area |
|---|---|---|---|
| | (GLA - Square Feet) | | |
| Supermarkets | 300,400 | 13,500 | 313,900 |
| Specialty Food Stores | 46,300 | 13,300 | 59,600 |
| Total FOR | 346,700 | 26,800 | 373,500 |

Source: The Dalvay Group. See Appendix A for detailed inventory.

**TABLE A2: STUDY AREA SUPERMARKET INVENTORY**

| **Primary Study Area** | | **Square Feet** |
|---|---|---|
| Metro | N/W Cnr. Oxford St.W./Cherryhill Blvd. | 30,000 |
| No Frills | N/E Cnr. Fanshawe Park Rd./Wonderland Rd.N. | 38,000 |
| Unger's Market | Hyde Park Rd. (Between Gainsborough/Sarnia) | 6,600 |
| Loblaws Great Food | N/E Cnr. Fanshawe Park Rd.E./Richmond St. | 82,000 |
| Sobeys | N/W Cnr. Fanshawe Park Rd. W/Adelaide St.N. | 43,800 |
| Metro | N/W Cnr. Wonderland Rd.N./Sherwood Forest | 40,000 |
| Walmart | S/E Cnr. Fanshawe Park Rd./Stanton Dr. | 60,000 |
| | Total | 300,400 |
| **Secondary Study Area** | | |
| Foodland | Komoka | 6,000 |
| Foodland | Lucan | 7,500 |
| | Total | 13,500 |

Source: The Dalvay Group

**Food Inventory- North West London June 2011(2)**

| No | Store Name | Store Type | Street No. | Street Name | Relative Location | Study Area | Size |
|---|---|---|---|---|---|---|---|
| 1 | Metro | Supermarket & Other Grocery | 301 | Oxford St W | North Side Oxford Between Platt & Columbia | PTA | 30,000 |
| 2 | No-Frills | Supermarket & Other Grocery | 599 | Fanshawe | NE Fanshawe & Wonderland | PTA | 38,000 |
| **3** | **Unger's Market** | **Supermarket & Other Grocery** | **1086** | **Gainsborough** | **East Side Hyde Park Between Gainsborough & Sarnia Rd** | PTA | **6,600** |
| 4 | Loblaw's | Supermarket & Other Grocery | 95 | Fanshawe Park E | North Side of Fanshawe Between Richmond & North Center Rd | PTA | 82,000 |
| 5 | Sobeys | Supermarket & Other Grocery | 600 | Fanshawe Park E | North West Corner Fanshawe & Adelaide | PTA | 43,800 |
| 6 | Metro | Supermarket & Other Grocery | 1225 | Wonderland Rd | South West Corner Sherwood Forest & Wonderland | PTA | 40,000 |
| **7** | **Costco** | **Warehouse Clubs and Superstores** | | **Wonderland Rd** | **East Side Wonderland Between Donahue& Beaverbrook** | PTA | **138,000** |
| 8 | Wal-Mart | Department Stores with a Large food component (i.e. Wal-Mart Supercentres) | 1280 | Fanshawe Park W | South East Corner Fanshawe & Stanton | PTA | 196,000 |
| | | | | | | | 574,400 |
| 9 | West Town Variety | Convenience Stores | 301 | Oxford St W | North Side Oxford Between Platt & Columbia | PTA | 3,000 |
| 10 | Oxford Variety | Convenience Stores | 205 | Oxford W | South Side of Oxford West of Richmond | PTA | 1,600 |
| 11 | Aladdin Food | Convenience Stores | 611 | Wonderland Rd | South East Corner Wonderland & Oxford | PTA | 1,300 |
| 12 | Ray's Variety | Convenience Stores | 243 | Wharncliffe Rd. N | East Wharncliffe Rd. N South of Oxford St. | PTA | 600 |
| 13 | Westside Variety | Convenience Stores | | Wharncliffe Rd. N | West Wharncliffe Rd. N South of Charles St. | PTA | 1,100 |
| 14 | Fanshawe Minimart | Convenience Stores | 109 | Fanshawe Park E | South East Corner Fanshawe Park & North Center | PTA | 3,100 |
| 15 | Hyland Convenience | Convenience Stores | 1735 | Richmond St N | North West Corner Fanshawe Park & Richmond | PTA | 1,800 |
| 16 | Finest Foods | Convenience Stores | 2115 | Wonderland Rd | South West Corner Fanshawe Wonderland | PTA | 2,100 |
| 17 | Wonderland Convenience | Convenience Stores | 666 | Wonderland Rd | North West Corner Wonderland & Oxford | PTA | 1,600 |
| **18** | **Farah Foods** | **Convenience Stores** | **260** | **Blue Forest Dr** | **North West Corner Wonderland & Sarnia** | PTA | 2,500 |
| 19 | Mac's Milk | Convenience Stores | 735 | Wonderland Rd | South East Corner Wonderland & Beaverbrook | PTA | 2,400 |
| 20 | Tiger Express | Convenience Stores | 600 | Fanshawe Park E | North West Corner Fanshawe & Adelaide | PTA | 500 |
| 21 | Seven - Eleven | Convenience Stores | 72 | Wharncliffe Rd. N | West Wharncliffe Rd. N South of Mt. Pleasant Av. | PTA | 2,900 |
| 22 | M&M Meats | Meat Markets | 1673 | Richmond St N | South West Corner Fanshawe Park & Richmond | PTA | 2,000 |
| 23 | M&M Meats | Meat Markets | 735 | Wonderland Rd | South East Corner Wonderland & Beaverbrook | PTA | 1,800 |
| 24 | Pasquali's Meat | Meat Markets | 735 | Wonderland Rd | South East Corner Wonderland & Beaverbrook | PTA | 1,800 |
| 25 | Bulk Barn | Other Specialty Food | 1280 | Fanshawe Park W | South East Corner Fanshawe & Stanton | PTA | 4,500 |
| 26 | Bulk Barn | Other Specialty Food | 1680 | Richmond St N | Southeast Corner Richmond & Fanshawe | PTA | 4,600 |
| 27 | Bulk Barrel | Other Specialty Food | 1225 | Wonderland Rd | South West Corner Sherwood Forest & Wonderland | PTA | 4,000 |
| 28 | Happy Days Conveneince | Convenience Stores | 1438 | Aldersbrook Rd | Aldersbrook & Gainsborough | PTA | 3,600 |
| | | | | | | | 46,800 |
| 29 | Legg's General Store | Convenience Stores | | Hwy 4 | Hwy 4 @ 13th Side Rd | STA | 1,500 |
| 30 | Clark Variety | Convenience Stores | 33406 | Richmond St, Lucan | Lucan | STA | 1,500 |
| 31 | Esso Convenience | Convenience Stores | | Richmond St, Lucan | Lucan | STA | 1,800 |
| 32 | Hillside Variety | Convenience Stores | | Komoka | Komoka | STA | 1,500 |
| 33 | Larkin Variety | Convenience Stores | | Richmond St, Lucan | Lucan | STA | 1,000 |
| 34 | Ilderton Foodmart | Convenience Stores | | Ilderton | Ilderton | STA | 1,800 |
| 35 | Sunni"s Convenience | Convenience Stores | | Ilderton | Ilderton | STA | 1,200 |
| 36 | Poplar Hill Variety | Convenience Stores | | Poplar Hill | Poplar Hill | STA | 1,500 |
| 37 | Little Beaver Variety | Convenience Stores | | Komoka | Komoka | STA | 1,500 |
| 38 | Foodland | Supermarket & Other Grocery | | Komoka | Komoka | STA | 6,000 |
| 39 | Lucan Foodland | Supermarket & Other Grocery | | Lucan | Lucan | STA | 7,500 |
| 40 | Denfield Variety | Convenience Stores | | Denfield Rd | Denfield | STA | 1,500 |
| | | | | | | | 28,300 |

# APPENDIX B

## STUDY AREA CONSUMER TELEPHONE SURVEY

## a) QUESTIONNAIRE

# LONDON
# TELEPHONE CONSUMER SURVEY

Interviewer: ____________________ Verified by: ______________

Date of Interview: For Office Use

Good ______________. My name is __________________ of Network Research, a market research company. We are conducting a survey of people's shopping habits and I would like to ask you a few questions. I assure you we are not selling anything.

**A. May I speak with the person in your household who does most of the shopping?**

YES. GO TO QUESTION B.
NO: TERMINATE INTERVIEW. THIS IS NOT A COMPLETED SURVEY.
None ......PROBE TO SPEAK WITH FEMALE/MALE HEAD OF HOUSEHOLD AND IF NEITHER ARE AVAILABLE, TERMINATE INTERVIEW AND RECORD.

**B. In the last <u>THREE MONTHS</u>, have you done any shopping whatsoever?**

YES: GO TO QUESTION C.
NO: TERMINATE INTERVIEW. THIS IS NOT A COMPLETED SURVEY.

**C. INTERVIEWER: Ask the appropriate question below from the list for the SAMPLE AREA you are calling:**

**Do you live in...**

**Interviewer: Please Watch Quota**

***Circle Sample Area***

Primary Study Area

| | |
|---|---|
| **Area 1** | **Does your postal code start with N6H and do you live north of Oakridges** |
| **Area 2** | **Does your postal code start with N6G** |
| **Area 3** | **Does your postal code start with N5X** |
| | |
| **Area 4** | **Does your postal code start with N0M and do you live in Middlesex Centre North of the Thames River in the West** |
| **Area 5** | **Does your postal code start with Nom and do you live in Lucan Biddulph** |
| **Area 6** | **Does you postal code start with N0M and do you live north of Thorndale Road and W** |

**D. What community is your residence in?**

City/Township/Community. ______________________________

**E. Could you please tell me your 6 digit postal code at this residence?**

____ ____ ____ ____ ____ ____

| | circle |
|---|---|
| No / Refused: | 1 |

***INTERVIEWER: Please record data below and continue with survey***

Phone Number. ______________________________

Address. ______________________________ City/Township/Community: ____________________

Time Started. __________ am / pm Time Finished. __________ am / pm

***INTERVIEWER: Please ensure that information is complete, then proceed to Question 1a.***

1 a) In just the past <u>THREE MONTHS</u>, have you shopped at a WAREHOUSE MEMBERSHIP CLUB, such as Costco?

| | *Circle* | | |
|---|---|---|---|
| Yes .... | 1 | *[GO TO QUESTION* | *1 b)]* |
| No.. .. | 2 | *[SKIP TO QUESTION* | *2 a)]* |

***FOR EACH "YES" RESPONSE, ASK THE FOLLOWING QUESTIONS TOGETHER***

1 b) What is the name of the club and where is it located?

1 c) About how much did you spend during the past <u>THREE MONTHS</u> at this club in TOTAL?

1 d) And how much of this was spent on items that you would normally find in a supermarket, such as food and groceries, health and beauty aids and cleaning supplies?

| 1 b) Name of Store | 1 b) Location *Community/Shopping Centre/Street Location* | CIRCLE LOCATION CODE(S) | 1 c) Amount Spent in Total | 1 d) Supermarket Items |
|---|---|---|---|---|
| Costco | London North - 693 Wonderland Road North and Oxford | 1 | $ .00 | $ .00 |
| Costco | London South - 4313 Wellington Road South and Roxburgh | 2 | $ .00 | $ .00 |
| Costco | Kitchener - 4438 King Street East and Sportsworld | 3 | $ .00 | $ .00 |
| Costco | Ancaster - 100 Legend Court | 4 | $ .00 | $ .00 |
| Costco | Burlington - 1225 Brant Street | 5 | $ .00 | $ .00 |

| *OTHER (SPECIFY)* | *Community/Shopping Centre/Street Location* | | | |
|---|---|---|---|---|
| Costco | | 6 | $ .00 | $ .00 |
| Costco | | 7 | $ .00 | $ .00 |
| Other | | 8 | $ .00 | $ .00 |

**Have you shopped at any other WAREHOUSE CLUBS in the past THREE MONTHS?**

***IF YES, REPEAT QUESTION 1 b) to 1c) above as often as necessary. If NO, GO TO 2 a)***

**_INTERVIEWER: THE FOLLOWING QUESTIONS ARE FOR SHOPPING HABITS IN THE PAST MONTH_**

2 a) In just the past MONTH, have you shopped in a DISCOUNT or FULL SERVICE SUPERMARKET or GROCERY STORE?

| | | | |
|---|---|---|---|
| Yes | ............ 1 | *[GO TO QUESTION* | *2 b)]* |
| No | ............ 2 | *[SKIP TO QUESTION* | *3 a)]* |

2 b) What is the name of the supermarket and where is it located?

2 c) About how much did you spend during the past MONTH at this store?

**_FOR EACH "YES" RESPONSE, ASK THE FOLLOWING QUESTIONS TOGETHER_**

3 a) In just the past MONTH, have you purchased food in a Wal-Mart Superstore?

| | | | |
|---|---|---|---|
| Yes | ............ 1 | *[GO TO QUESTION* | *3 b)]* |
| No | ............ 2 | *[SKIP TO QUESTION* | *4 a)]* |

3 b) Where is it located [PLEASE NOTE: THE WALMARTS ARE LISTED AT THE BOTTOM OF THE SUPERMARET LIST]

3 c) How much did you spend on items that you would normally find in a supermarket such as food, groceries, health and beauty aids and cleaning supplies?

**_FOR EACH "YES" RESPONSE, ASK THE FOLLOWING QUESTIONS TOGETHER_**

| 2, 3 b)<br>Name of Store | 2, 3 b)<br>Location<br>*Community/Shopping Contro/Street Location* | CIRCLE LOCATION CODE(S) | | 2,3 c)<br>Amount Spent | |
|---|---|---|---|---|---|
| Food Basics | London - 1299 Oxford Street and Sanitorium | 1 | $ | | .00 |
| Food Basics | London - 509 Commissioners Road and Wonderland | 2 | $ | | .00 |
| Food Basics | London - 1200 Commissioners Road and Highbury | 3 | $ | | .00 |
| Food Basics | London - 1401 Earnest Avenue and Bradley | 4 | $ | | .00 |
| Food Basics (Other) | | 5 | $ | | .00 |
| Loblaws Great Food | London - 3040 Wonderland Road and Southdale | 6 | $ | | .00 |
| Loblaws Great Food | London - 1740 Richmond Street and Fanshawe | 7 | $ | | .00 |
| Loblaws Great Food (Other) | | 8 | $ | | .00 |
| Metro | London - 785 Wonderland South and Commissioners | 9 | $ | | .00 |
| Metro | London - 1225 Wonderland Road and Gainsburough | 10 | $ | | .00 |
| Metro | London - 395 Wellington Road and Commissioners | 11 | $ | | .00 |
| Metro | London - 1030 Adelaide Street and Cheapside | 12 | $ | | .00 |
| Metro | London - 1244 Commissioners Road and Boler | 13 | $ | | .00 |
| Metro | London - 155 Clark Road and Trafalgar | 14 | $ | | .00 |
| Metro | London - 301 Oxford Street and Platts Lane | 15 | $ | | .00 |
| Metro (Other) | | 16 | $ | | .00 |
| No-Frills (Rundals) | London - 635 Southdale Rd. E | 17 | | | |
| No-Frills (Paul and Cathy's) | London - 960 Hamilton Road | 18 | | | |
| No-Frills (Adrians) | London - 1925 Dundas Street East | 19 | | | |
| NO-Frills (Marks) | London - 599 Fanshawe Park Road | 20 | | | |
| No-Frills (Masses) | London - 925 Southdale Road West | 21 | | | |
| No-Frills (Brians) | London - 1275 Highbury | 22 | | | |
| No-Frills (Other) | | 23 | $ | | .00 |
| Price Chopper | London - 1298 Trafalgar Street and Highbury | 24 | $ | | .00 |
| Price Chopper | London - 1080 Adelaide Street and Regent | 25 | $ | | .00 |
| Price Chopper | London - 645 Commissioners Road and Wellington | 26 | $ | | .00 |
| Price Chopper (Other) | | 27 | $ | | .00 |
| Real Cdn. Super Store | London - 1201 Oxford Street and Hyde Park | 28 | $ | | .00 |
| Real Cdn. Super Store | London - 825 Oxford Street East and Sterling | 29 | $ | | .00 |
| Real Cdn. Super Store (Other) | | 30 | $ | | .00 |
| Sobeys | London - 1595 Adelaide Street and Fanshawe | 31 | $ | | .00 |
| Sobeys (Other) | | 32 | $ | | .00 |
| Valu-Mart | London - 234 Oxford Street and Richmond | 33 | $ | | .00 |
| Valu-Mart (Gary's) | London - 7 Baseline Road East | 34 | | | |
| Valu-Mart (John's) | London - 179 Wortley Road (Wortley Village) | 35 | $ | | .00 |
| Valu-Mart (Others) | | 36 | $ | | .00 |
| Wal-Mart SC | London - Power Centre - Fanshawe and Hyde Park | 37 | $ | | .00 |
| Wal-Mart SC (Other) | | 38 | $ | | .00 |

***OTHERS [ SPECIFY]***

| *Name of Store* | *Community/Shopping Contro/Street Location* | | | | |
|---|---|---|---|---|---|
| Other | | 39 | $ | | .00 |
| Other | | 40 | $ | | .00 |

Have you shopped at any other SUPERMARKETS OR GROCERY STORES or in the past MONTH?

**_IF YES, REPEAT QUESTION 2 AND 3 b to 2 AND 3 c) above as often as necessary. If NO, GO TO 4 a)_**

4 a) In just the past <u>MONTH</u>, have you shopped at any of the following SPECIALTY FOOD STORES?

| | | | Circle | | | | Circle | |
|---|---|---|---|---|---|---|---|---|
| (i) | A convenience store or jug milk store? | Yes | 1 | GO TO 4 | b) | No | 2 | [SKIP TO (ii)] |
| (ii) | A fish, meat or seafood market or deli? | Yes | 1 | GO TO 4 | b) | No | 2 | [SKIP TO (iii)] |
| (iii) | A green grocer or fruit & vegetable market? | Yes | 1 | GO TO 4 | b) | No | 2 | [SKIP TO (iv)] |
| (iv) | A candy or nut store? | Yes | 1 | GO TO 4 | b) | No | 2 | [SKIP TO (v)] |
| (v) | A bulk food or cheese store? | Yes | 1 | GO TO 4 | b) | No | 2 | [SKIP TO 5 a)] |

*FOR EACH "YES" RESPONSE, ASK THE FOLLOWING QUESTIONS TOGETHER*

4 b) What is the name of the specialty food store and where is it located?

4 c) About how much did you spend during the past MONTH at this store?

| 4 b) Name of Store | 4 b) Location *Community/Shopping Centre/Street Location* | NODE CODE(S) | | 4 c) Amount Spent | |
|---|---|---|---|---|---|
| | | | $ | | .00 |
| | | | $ | | .00 |
| | | | $ | | .00 |
| | | | $ | | .00 |
| | | | $ | | .00 |
| | | | $ | | .00 |
| | | | $ | | .00 |
| | | | $ | | .00 |
| | | | $ | | .00 |

Have you shopped at any other SPECIALTY FOOD STORES in the past MONTH?

*IF YES, REPEAT QUESTION 3 b) to 3c) above as often as necessary. If NO, GO TO 5 a)*

5 a) In just the past <u>MONTH</u>, have you shopped at any of the following PHARMACIES & PERSONAL CARE stores?

| | | | Circle | | | | | Circle |
|---|---|---|---|---|---|---|---|---|
| (i) | A pharmacy or drug store? | Yes | 1 | GO TO | 5 b) | No | 2 | [SKIP TO (ii)] |
| (ii) | A cosmetic store? | Yes | 1 | GO TO | 5 b) | No | 2 | [SKIP TO (iii)] |
| (iii) | An optical store? | Yes | 1 | GO TO | 5 b) | No | 2 | [SKIP TO (iv)] |
| (iv) | A health food or nutritional supplement store? | Yes | 1 | GO TO | 5 b) | No | 2 | [SKIP TO 6) |

*FOR EACH "YES" RESPONSE, ASK THE FOLLOWING QUESTIONS TOGETHER*

5 b) What is the name of the store and where is it located?

5 c) About how much did you spend during the past MONTH at this store?

| 5 b) Name of Store | 5 b) Location *Community/Shopping Centre/Street Location* | STORE TYPE | NODE CODE | | 5 c) Amount Spent | |
|---|---|---|---|---|---|---|
| IDA Pharmacy | | | | $ | | .00 |
| Pharma Plus | | | | $ | | .00 |
| Rexall | | | | $ | | .00 |
| Shoppers Drug Mart | | | | $ | | .00 |
| Shoppers Drug Mart | | | | $ | | .00 |
| Shoppers Drug Mart | | | | $ | | .00 |
| Shoppers Drug Mart | | | | $ | | .00 |
| Shoppers Drug Mart | | | | $ | | .00 |
| Shoppers Drug Mart | | | | $ | | .00 |
| Shoppers Drug Mart (Other) | | | | $ | | .00 |
| Other (Please specify) | | | | $ | | .00 |
| | | | | $ | | .00 |
| | | | | $ | | .00 |
| | | | | $ | | .00 |
| | | | | $ | | .00 |
| | | | | $ | | .00 |

Have you shopped at any other PHARMACIES & PERSONAL CARE stores in the PAST MONTH?

*IF YES, REPEAT QUESTION 4 b) to 4c) above as often as necessary. If NO, GO TO 6*

5 **How many persons live in your household?**

Enter the number of people

| |
|---|
| |

6 **Are you ....?**

| | CIRCLE |
|---|---|
| Employed outside the Home Full-Time | 1 |
| Employed outside the Home Part-Time | 2 |
| Employed full time and working out of your home? | 3 |
| Employed part time and working out of your home? | 4 |
| Unemployed | 5 |
| Retired | 6 |
| Student | 7 |
| Homemaker | 8 |
| Other (*SPECIFY:*) | 9 |

8 **In which of the following age groups are you?**
***[READ LIST]***

| | CIRCLE |
|---|---|
| Under 25 | 1 |
| 25-34 | 2 |
| 35-44 | 3 |
| 45-54 | 4 |
| 55-64 | 5 |
| 65 and over | 6 |
| Refused | 7 |

***INTERVIEWER: PLEASE RECORD***

***INTERVIEW COMPLETED WITH:***

| | |
|---|---|
| **Male primary shopper** | 1 |
| **Female primary shopper** | 2 |

**THANK YOU FOR YOUR TIME AND CO-OPERATION !**

## b) SUMMARY RESULTS

## SAMPLE AREA

| | TOTAL | N6H | N6G | N5X | TOTAL PRIMARY | MIDDLESEX CENTRE | LUCAN BIDDULPH | THAMES CENTRE | TOTAL SECONDARY |
|---|---|---|---|---|---|---|---|---|---|
| **PRIMARY SAMPLE AREA** | 66.8% | 100.0% | 100.0% | 100.0% | 100.0% | - | - | - | - |
| N6H | 15.0% | 100.0% | - | - | 22.4% | - | - | - | - |
| N6G | 29.2% | - | 100.0% | - | 43.8% | - | - | - | - |
| N5X | 22.6% | - | - | 100.0% | 33.8% | - | - | - | - |
| **SECONDARY SAMPLE AREA** | 33.2% | - | - | - | - | 100.0% | 100.0% | 100.0% | 100.0% |
| N0M, Middlesex Centre | 25.2% | - | - | - | - | 100.0% | - | - | 76.0% |
| N0M, Lucan Biddulph | 7.6% | - | - | - | - | - | 100.0% | - | 23.0% |
| N0M, Thames Centre | 0.3% | - | - | - | - | - | - | 100.0% | 1.0% |
| **TOTAL RESPONDENTS** | **301** | **45** | **88** | **68** | **201** | **76** | **23** | **1** | **100** |

## POSTAL CODE

| | TOTAL | N6H | N6G | N5X | TOTAL PRIMARY | MIDDLESEX CENTRE | LUCAN BIDDULPH | THAMES CENTRE | TOTAL SECONDARY |
|---|---|---|---|---|---|---|---|---|---|
| N6H | 15.0% | 100.0% | - | - | 22.4% | - | - | - | - |
| N6G | 29.2% | - | 100.0% | - | 43.8% | - | - | - | - |
| N5X | 22.6% | - | - | 100.0% | 33.8% | - | - | - | - |
| N0M | 2.0% | - | - | - | - | 6.6% | 4.3% | - | 6.0% |
| N0M 1C0 | 3.3% | - | - | - | - | 13.2% | - | - | 10.0% |
| N0M 1P0 | 4.3% | - | - | - | - | 17.1% | - | - | 13.0% |
| N0M 1V0 | 2.3% | - | - | - | - | - | 30.4% | - | 7.0% |
| N0M 2A0 | 13.6% | - | - | - | - | 53.9% | - | - | 41.0% |
| N0M 2J0 | 7.3% | - | - | - | - | 9.2% | 65.2% | - | 22.0% |
| N0M 2P0 | 0.3% | - | - | - | - | - | - | 100.0% | 1.0% |
| TOTAL RESPONDENTS | 301 | 45 | 88 | 68 | 201 | 76 | 23 | 1 | 100 |

## WAREHOUSE MEMBERSHIP CLUB TOTAL EXPENDITURE

| | TOTAL | N6H | N6G | N5X | TOTAL PRIMARY | MIDDLESEX CENTRE | LUCAN BIDDULPH | THAMES CENTRE | TOTAL SECONDARY |
|---|---|---|---|---|---|---|---|---|---|
| **Primary Trade Area** | | | | | | | | | |
| Costco - London/693 Wonderland Rd N | 96.9% | 97.4% | 97.4% | 97.0% | 97.3% | 94.4% | 100.0% | - | 95.8% |
| **Outside Trade Area** | | | | | | | | | |
| Costco - London/4313 Wellington Rd S | 3.1% | 2.6% | 2.6% | 3.0% | 2.7% | 5.6% | - | - | 4.2% |
| **TOTAL EXPENDITURE** | $71,935 | $11,465 | $27,295 | $16,470 | $55,230 | $12,585 | $4,120 | - | $16,705 |
| **TOTAL RESPONDENTS** | 161 | 31 | 57 | 28 | 116 | 35 | 10 | - | 45 |

## WAREHOUSE MEMBERSHIP CLUB SUPERMARKET EXPENDITURE

| | TOTAL | N6H | N6G | N5X | TOTAL PRIMARY | MIDDLESEX CENTRE | LUCAN BIDDULPH | THAMES CENTRE | TOTAL SECONDARY |
|---|---|---|---|---|---|---|---|---|---|
| **Primary Trade Area** | | | | | | | | | |
| Costco - London/693 Wonderland Rd N | 97.9% | 97.5% | 99.4% | 96.4% | 98.4% | 95.3% | 100.0% | - | 96.3% |
| **Outside Trade Area** | | | | | | | | | |
| Costco - London/4313 Wellington Rd S | 2.1% | 2.5% | 0.6% | 3.6% | 1.6% | 4.7% | - | - | 3.7% |
| **TOTAL EXPENDITURE** | $39,906 | $5,970 | $17,550 | $6,856 | $30,376 | $7,430 | $2,100 | - | $9,530 |
| **TOTAL RESPONDENTS** | 152 | 29 | 51 | 28 | 108 | 35 | 9 | - | 44 |

## WAREHOUSE MEMBERSHIP CLUB TOTAL EXPENDITURE

| | TOTAL | N6H | N6G | N5X | TOTAL PRIMARY | MIDDLESEX CENTRE | LUCAN BIDDULPH | THAMES CENTRE | TOTAL SECONDARY |
|---|---|---|---|---|---|---|---|---|---|
| Primary Trade Area | 96.9% | 97.4% | 97.4% | 97.0% | 97.3% | 94.4% | 100.0% | - | 95.8% |
| Outside Trade Area | 3.1% | 2.6% | 2.6% | 3.0% | 2.7% | 5.6% | - | - | 4.2% |
| TOTAL EXPENDITURE | $71,935 | $11,465 | $27,295 | $16,470 | $55,230 | $12,585 | $4,120 | - | $16,705 |
| TOTAL RESPONDENTS | 161 | 31 | 57 | 28 | 116 | 35 | 10 | - | 45 |

## WAREHOUSE MEMBERSHIP CLUB SUPERMARKET EXPENDITURE

| | TOTAL | N6H | N6G | N5X | TOTAL PRIMARY | MIDDLESEX CENTRE | LUCAN BIDDULPH | THAMES CENTRE | TOTAL SECONDARY |
|---|---|---|---|---|---|---|---|---|---|
| Primary Trade Area | 97.9% | 97.5% | 99.4% | 96.4% | 98.4% | 95.3% | 100.0% | - | 96.3% |
| Outside Trade Area | 2.1% | 2.5% | 0.6% | 3.6% | 1.6% | 4.7% | - | - | 3.7% |
| TOTAL EXPENDITURE | $39,906 | $5,970 | $17,550 | $6,856 | $30,376 | $7,430 | $2,100 | - | $9,530 |
| TOTAL RESPONDENTS | 152 | 29 | 51 | 28 | 108 | 35 | 9 | - | 44 |

## SUPERMARKET & GROCERY STORE EXPENDITURE

| | TOTAL | N6H | N6G | N5X | TOTAL PRIMARY | MIDDLESEX CENTRE | LUCAN BIDDULPH | THAMES CENTRE | TOTAL SECONDARY |
|---|---|---|---|---|---|---|---|---|---|
| **Primary Trade Area** | | | | | | | | | |
| Loblaws - London/1740 Richmond St | 15.3% | - | 15.7% | 22.4% | 14.2% | 17.7% | 16.2% | - | 17.3% |
| Metro - London/Cherryhill Village Mall | 1.7% | 8.1% | 1.5% | 0.2% | 2.6% | - | - | - | - |
| Metro - London/Sherwood Forest Mall | 3.3% | 1.0% | 9.0% | - | 4.6% | 1.2% | 0.3% | - | 1.0% |
| No Frills - London/599 Fanshawe Park Rd W | 24.9% | 7.8% | 35.0% | 5.4% | 20.2% | 36.4% | 24.6% | - | 33.7% |
| Sobeys - London/1595 Adelaide St N | 8.9% | - | 1.7% | 32.6% | 10.4% | 6.3% | 5.9% | - | 6.2% |
| Ungers - London/1010 Gainsborough Rd | 1.8% | 0.3% | 0.8% | 8.0% | 2.8% | - | - | - | - |
| Walmart - London/Smartcentres London North | 12.5% | 11.0% | 12.3% | 8.1% | 10.7% | 16.2% | 13.8% | - | 15.6% |
| **Secondary Trade Area** | | | | | | | | | |
| Foodland - Lucan | 2.1% | - | - | - | - | 1.4% | 23.3% | - | 6.0% |
| **Outside Trade Area** | | | | | | | | | |
| Food Basics - London/Commissioners Court Plaza | 2.1% | 3.9% | 3.5% | 2.4% | 3.2% | - | - | - | - |
| Food Basics - London/1200 Commissioners Rd E | 0.6% | - | 0.3% | 0.2% | 0.2% | 1.4% | - | 28.6% | 1.2% |
| Food Basics - London/1401 Earnest Ave | 0.4% | 2.1% | 0.5% | - | 0.7% | - | - | - | - |
| Food Basics - London/1299 Oxford St E | 0.3% | 0.2% | - | 0.8% | 0.3% | - | 2.0% | - | 0.4% |
| Food Basics - Strathroy | 0.0% | - | - | - | - | 0.1% | - | - | 0.1% |
| Foodland - St Mary's | 0.1% | - | - | - | - | - | 2.0% | - | 0.4% |
| Freshco - London/645 Commissioners Rd E | 0.1% | - | 0.2% | - | 0.1% | 0.1% | - | - | 0.1% |
| Freshco - London/1298 Trafalgar St | 0.2% | - | 0.2% | - | 0.1% | 0.5% | - | - | 0.4% |
| Loblaws - London/3040 Wonderland Rd S | 0.4% | - | 0.6% | - | 0.3% | 0.5% | 0.3% | - | 0.5% |
| Metro - London/Adelaide Centre | 2.3% | - | 0.2% | 11.2% | 3.4% | - | 1.5% | - | 0.3% |
| Metro - London/Riocan Centre London South | 0.0% | - | - | - | - | 0.1% | - | - | 0.1% |
| Metro - London/Westmount S.C. | 0.0% | - | 0.1% | - | 0.1% | - | - | - | - |
| Metro - London/1244 Commissioners Rd W | 0.4% | 3.1% | - | - | 0.7% | - | - | - | - |
| No Frills - London/7 Baseline Rd E | 0.1% | 1.0% | - | - | 0.2% | - | - | - | - |
| No Frills - London/1925 Dundas St E | 0.7% | 3.6% | - | - | 0.8% | - | 2.0% | - | 0.4% |
| No Frills - London/960 Hamilton Rd | 0.1% | - | - | 0.4% | 0.1% | - | - | - | - |
| No Frills - London/1275 Highbury Ave | 0.9% | 0.3% | - | 4.0% | 1.2% | - | - | 42.9% | 0.2% |
| No Frills - London/635 Southdale Rd E | 0.4% | 2.3% | 0.1% | 0.2% | 0.6% | - | - | - | - |
| No Frills - London/925 Southdale Rd W | 1.2% | 2.1% | 1.1% | - | 1.0% | 2.2% | - | - | 1.7% |
| Price Chopper - London/1080 Adelaide St N | 0.4% | 0.2% | 0.2% | 1.3% | 0.5% | 0.4% | - | - | 0.3% |
| RCSS - London/Oakridge Centre | 15.1% | 53.2% | 13.4% | 1.3% | 18.8% | 10.7% | - | - | 8.4% |
| RCSS - London/825 Oxford St E | 1.0% | - | 1.2% | 1.2% | 0.9% | 0.1% | 5.1% | 28.6% | 1.2% |
| RCSS - Strathroy | 1.2% | - | - | - | - | 4.3% | - | - | 3.3% |
| United Supermarket - London/1062 Adelaide St N | 0.7% | - | 2.2% | - | 1.1% | - | - | - | - |
| Valu Mart - London/234 Oxford St E | 0.1% | - | - | 0.4% | 0.1% | - | - | - | - |
| YIG - Exeter | 0.2% | - | - | - | - | 0.5% | 1.2% | - | 0.7% |
| YIG - St. Mary's | 0.1% | - | - | - | - | - | 2.0% | - | 0.4% |
| **TOTAL EXPENDITURE** | $133,577 | $19,425 | $41,815 | $25,460 | $86,700 | $36,812 | $9,890 | $175 | $46,877 |
| **TOTAL RESPONDENTS** | 295 | 45 | 87 | 63 | 195 | 76 | 23 | 1 | 100 |

## SUPERMARKET & GROCERY STORE EXPENDITURE

| | TOTAL | N6H | N6G | N5X | TOTAL PRIMARY | MIDDLESEX CENTRE | LUCAN BIDDULPH | THAMES CENTRE | TOTAL SECONDARY |
|---|---|---|---|---|---|---|---|---|---|
| Primary Trade Area | 68.4% | 28.2% | 75.9% | 76.7% | 65.5% | 77.7% | 60.6% | - | 73.8% |
| Secondary Trade Area | 2.1% | - | - | - | - | 1.4% | 23.3% | - | 6.0% |
| Outside Trade Area | 29.5% | 71.8% | 24.1% | 23.3% | 34.5% | 21.0% | 16.1% | 100.0% | 20.3% |
| **TOTAL EXPENDITURE** | **$133,577** | **$19,425** | **$41,815** | **$25,460** | **$86,700** | **$36,812** | **$9,890** | **$175** | **$46,877** |
| **TOTAL RESPONDENTS** | **295** | **45** | **87** | **63** | **195** | **76** | **23** | **1** | **100** |

## SPECIALTY FOOD STORE EXPENDITURE

| | TOTAL | N6H | N6G | N5X | TOTAL PRIMARY | MIDDLESEX CENTRE | LUCAN BIDDULPH | THAMES CENTRE | TOTAL SECONDARY |
|---|---|---|---|---|---|---|---|---|---|
| Primary Trade Area | 23.6% | 13.7% | 30.6% | 22.8% | 24.0% | 26.2% | 9.5% | - | 22.8% |
| Secondary Trade Area | 4.6% | 0.9% | - | 1.0% | 0.5% | 8.6% | 28.0% | - | 12.3% |
| Outside Trade Area | 71.8% | 85.4% | 69.4% | 76.2% | 75.5% | 65.2% | 62.5% | 100.0% | 64.9% |
| TOTAL EXPENDITURE | $17,426 | $3,295 | $5,625 | $2,450 | $11,370 | $4,856 | $1,160 | $40 | $6,056 |
| TOTAL RESPONDENTS | 181 | 28 | 57 | 38 | 123 | 47 | 10 | 1 | 58 |

## PHARMACIES & PERSONAL CARE STORE EXPENDITURE

| | TOTAL | N6H | N6G | N5X | TOTAL PRIMARY | MIDDLESEX CENTRE | LUCAN BIDDULPH | THAMES CENTRE | TOTAL SECONDARY |
|---|---|---|---|---|---|---|---|---|---|
| Primary Trade Area | 52.4% | 19.4% | 70.4% | 59.3% | 57.2% | 52.6% | 26.9% | - | 42.6% |
| Secondary Trade Area | 6.3% | - | - | - | - | 21.9% | 15.6% | - | 19.4% |
| Outside Trade Area | 41.3% | 80.6% | 29.6% | 40.7% | 42.8% | 25.5% | 57.5% | 100.0% | 38.0% |
| TOTAL EXPENDITURE | $29,917 | $3,860 | $9,928 | $6,472 | $20,260 | $5,912 | $3,720 | $25 | $9,657 |
| TOTAL RESPONDENTS | 264 | 40 | 73 | 60 | 173 | 71 | 19 | 1 | 91 |

## HOUSEHOLD SIZE

| | TOTAL | N6H | N6G | N5X | TOTAL PRIMARY | MIDDLESEX CENTRE | LUCAN BIDDULPH | THAMES CENTRE | TOTAL SECONDARY |
|---|---|---|---|---|---|---|---|---|---|
| One | 12.6% | 20.0% | 10.2% | 8.8% | 11.9% | 13.2% | 17.4% | - | 14.0% |
| Two | 44.2% | 44.4% | 37.5% | 58.8% | 46.3% | 40.8% | 34.8% | 100.0% | 40.0% |
| Three | 8.3% | 4.4% | 12.5% | 7.4% | 9.0% | 5.3% | 13.0% | - | 7.0% |
| Four | 23.6% | 22.2% | 27.3% | 17.6% | 22.9% | 27.6% | 17.4% | - | 25.0% |
| Five or more | 5.6% | 6.7% | 5.7% | 2.9% | 5.0% | 7.9% | 4.3% | - | 7.0% |
| MEAN | 2.9 | 2.6 | 3.1 | 2.6 | 2.8 | 3.0 | 3.0 | 2.0 | 3.0 |
| TOTAL RESPONDENTS | 301 | 45 | 88 | 68 | 201 | 76 | 23 | 1 | 100 |

## OCCUPATION

| | TOTAL | N6H | N6G | N5X | TOTAL PRIMARY | MIDDLESEX CENTRE | LUCAN BIDDULPH | THAMES CENTRE | TOTAL SECONDARY |
|---|---|---|---|---|---|---|---|---|---|
| **EMPLOYED** | 54.2% | 46.7% | 60.2% | 51.5% | 54.2% | 53.9% | 56.5% | - | 54.0% |
| Employed outside the home full time | 38.2% | 37.8% | 42.0% | 36.8% | 39.3% | 35.5% | 39.1% | - | 36.0% |
| Employed outside the home part time | 11.6% | 8.9% | 10.2% | 11.8% | 10.4% | 15.8% | 8.7% | - | 14.0% |
| Employed full time and working out of your home | 3.0% | - | 3.4% | 2.9% | 2.5% | 2.6% | 8.7% | - | 4.0% |
| Employed part time and working out of your home | 1.3% | - | 4.5% | - | 2.0% | - | - | - | - |
| Unemployed | 0.7% | - | 2.3% | - | 1.0% | - | - | - | - |
| Retired | 35.2% | 48.9% | 26.1% | 42.6% | 36.8% | 31.6% | 30.4% | 100.0% | 32.0% |
| Student | 2.3% | - | 4.5% | 2.9% | 3.0% | 1.3% | - | - | 1.0% |
| Homemaker | 4.3% | - | 4.5% | 2.9% | 3.0% | 7.9% | 4.3% | - | 7.0% |
| On disability | 1.0% | 2.2% | 2.3% | - | 1.5% | - | - | - | - |
| Self employed | 2.0% | - | - | - | - | 5.3% | 8.7% | - | 6.0% |
| Refused | 0.3% | 2.2% | - | - | 0.5% | - | - | - | - |
| **TOTAL RESPONDENTS** | 301 | 45 | 88 | 68 | 201 | 76 | 23 | 1 | 100 |

## AGE

| | TOTAL | N6H | N6G | N5X | TOTAL PRIMARY | MIDDLESEX CENTRE | LUCAN BIDDULPH | THAMES CENTRE | TOTAL SECONDARY |
|---|---|---|---|---|---|---|---|---|---|
| Under 25 | 4.3% | - | 6.8% | 5.9% | 5.0% | 3.9% | - | - | 3.0% |
| 25-34 | 6.6% | 6.7% | 6.8% | 7.4% | 7.0% | 2.6% | 17.4% | - | 6.0% |
| 35-44 | 18.9% | 11.1% | 19.3% | 8.8% | 13.9% | 30.3% | 26.1% | - | 29.0% |
| 45-54 | 16.3% | 13.3% | 21.6% | 14.7% | 17.4% | 14.5% | 13.0% | - | 14.0% |
| 55-64 | 23.3% | 26.7% | 25.0% | 30.9% | 27.4% | 15.8% | 13.0% | - | 15.0% |
| 65 and over | 30.2% | 42.2% | 19.3% | 32.4% | 28.9% | 32.9% | 30.4% | 100.0% | 33.0% |
| Refused | 0.3% | - | 1.1% | - | 0.5% | - | - | - | - |
| TOTAL RESPONDENTS | 301 | 45 | 88 | 68 | 201 | 76 | 23 | 1 | 100 |

## GENDER

| | TOTAL | N6H | N6G | N5X | TOTAL PRIMARY | MIDDLESEX CENTRE | LUCAN BIDDULPH | THAMES CENTRE | TOTAL SECONDARY |
|---|---|---|---|---|---|---|---|---|---|
| Male | 29.6% | 28.9% | 31.8% | 29.4% | 30.3% | 26.3% | 34.8% | - | 28.0% |
| Female | 70.4% | 71.1% | 68.2% | 70.6% | 69.7% | 73.7% | 65.2% | 100.0% | 72.0% |
| TOTAL RESPONDENTS | 301 | 45 | 88 | 68 | 201 | 76 | 23 | 1 | 100 |