

AN ANALYSIS OF MAJOR RETAIL STORE CHANGE IN CANADA: 2013-2018

By

Dylan Connor Oldfield

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Abstract

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Ryerson University

International retail has experienced significant numbers of closures in bricks-and-mortar stores in recent years. Moreover, with substantial reporting's on international closures, there has been a notable absence for reports on Canadian retail as a whole in relation to store closures. Therefore, this research is a location-based analysis on where retail closures are in Canada. The objectives are: (1) to examine the store changes taking place in Canada through analysis of a selected subset of retailers; (2) to assess the influence of omni channel activities on store location strategies; and (3) to discuss the implications of store change with regard to the future of physical 'bricks-and-mortar' retailing in Canada. This major research paper utilizes a store per capita analysis to understand where closures in retail are in relation to population markets of varying sizes. The data utilized is from the Centre for Study of Commercial Activity, consisting of every physical store location between 2013 and 2018 for a set of twelve specifically selected retailers. The results of this paper are compared between the retailers respective retail sectors and supplementary retail quadrants they were assigned to.

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Chapter 1: Introduction

The traditional retail model has been centred on the single channel of physical bricks-and-mortar stores. Over the last two decades, there has been the emergence of online retail. With online retail, the exclusively physical interaction at bricks-and-mortar stores quickly shifted to include both physical (bricks-and-mortar) with digital (online) interactions between the customer and the retailer. It has recently become realized that the traditional retail format of bricks-and-mortar stores, is '*under siege*' from dominant online retailers, with wide spread bricks-and-mortar closures viewed as a sign of a '*retail apocalypse*' (Nickalls, 2018). This trend of retail closures has been reported extensively in the US and Europe. For example, in Scotland in 2017, over 500 stores closed, vacating formerly high occupancy retail strips due to retail location rental costs, and reductions in retail spending due to economic uncertainty (Bradley, 2018). In the US in 2017, it was reported to be well over 2000 store closures for the last half of the year, with more expected to occur in 2018 as well (Rizzo, 2018). Despite these reports there are a plethora of journal articles and retailer reports of international mass retail closures. By contrast, store closures in the Canadian retail market have not been reported on to the same extent.

With the introduction of online retailing decades ago, the understanding and evolution of online capabilities has expanded, and with the inclusion of mobile technology, potential interactions with customers is now limitless. It is from online retail that digital show rooms, online payments, and click-and-collect services, exist, and online retail has redefined the modern age of consumerism. As a result, online retail methods are disrupting retail traditions (Verhoef, 2015). This disruption and the integration of multiple shopping options (e.g., in store, online etc.) within retail strategy is known as omni channel retailing (Galipoglu, 2017). Retail channels have changed over time from exclusively single-channel (bricks-and-mortar or online), to multi-channels (bricks-and-mortar with online), cross-channel (efficient use of bricks-and-mortar with online), and now to omni channel (complete optimized use of all available channels with marketing). Omni channel is currently the most effective retail channel, consisting of a diverse combination of retail channels, which perfectly utilize "*marketing, logistics, supply chain and/or operations, since those areas significantly shape business activities and thus determine the channel structure/strategy of retailers*" (Galipoglu, 2017, p. 366). However, there are widespread concerns about omni channel as it is a difficult and highly expensive retail channel to integrate and maintain. Additionally, it is important to note that while omni channel integrates multiple retail channels together, the reason it is a functional and seamless system is through being "*interactive between customer and*

brand, which requires a focus on involving mobile and social networks and serving different customer needs” (Galipoglu, 2017, p. 368). It is due to these facts that major retailers, with substantial capital can financially afford to transition to incorporating retail channels with social media and use them to promote their respective brand or business. For example, the Bank of America, Walmart, Amazon, Alibaba, Starbucks and Sephora are all prominent users of omni channel. Could it be that due to these changes to traditional retail that the demand for space is shifting and as a result is causing bricks-and-mortar stores to ultimately close locations? The retail sector is reforming itself to better appeal and service the consumer. In other words, the physical locations of bricks-and-mortar stores are being used differently in tandem with online/e-commerce operations. While these drastic changes to retail are perceived to be the death of traditional bricks-and-mortar stores, perhaps through an in-depth examination, a different narrative could be unveiled. Instead of approaching and seeing the change as a negative, the changes to retail are not the end entirely of physical stores, but a disruption to the structure of retail as we know it.

The aim of this paper is to understand the nature of retail closures in Canada, through the examination of store openings and closures in order to gain a better understanding of current day (and potentially future) ‘bricks-and-mortar’ (BM) locations. The twelve retailers selected for this major research paper are: Metro, Loblaw’s, Longo’s, Best Buy, Staples, The Apple Store, Mark’s, Indochino, H&M, Dollarama, Sleep Country Canada, and IKEA.

Research Objectives

The objective of this major research paper are as follows:

1. To examine the store changes taking place in Canada through analysis of a selected subset of retailers.
2. To assess the influence of omni channel activities on store location strategies.
3. To discuss the implications of store change with regard to the future of physical ‘bricks-and-mortar’ retailing in Canada.

Area of Study

The breadth of this major research paper covers the locational footprint of the twelve selected retailers. This essentially means only the provinces that host retail locations will be within the area of study. Some provinces and territories that host few to no retail locations within their boundaries are not included in the area of study. Specifically, Nunavut, Yukon and the North West Territories were not included in this

study. This research will use the following census geographies, as defined by Statistics Canada: Census Metropolitan Area (CMA), Census Agglomeration (CA), and Census Subdivision (CSD). The reasoning behind utilizing these specific geographies was that they can be used to compile demographic data, and for the defining of consumer markets for retailers.

Structure of the Paper

Chapter 2, **Research Context**, provides a review of the literature relating to traditional concepts of retail channels versus modern channels and the changes that have shifted retail focus with their demand for space.

Chapter 3, **Data and Store per Capita Methodology**, provides an overview of the data and methodology utilized in this study, as well as a detailed reasoning for the selection of each retailer and their subsequent conceptual organization for analysis. The conceptual organization of the retailers is for the ease of understanding the where, how, who, and why retailers are failing, individually as well as within their respective sectors and quadrants of retail. Additionally, this chapter provides a complete guideline of how the data was processed for the analysis and visual presentation in the following chapter.

Chapter 4, **Analysis Results and Discussion**. This provides a complete description of results for each defined theme for the retailers being examined, as well as a discussion of the results and their broader implications.

Chapter 5, **Limitations and Conclusions**, details the limitations of the research as well as a summary of the research findings.

Chapter 2: Research Context

Changes to traditional BM retail strategies in Canada have been perceived to be caused from the utilization of the online retail channel, and more specifically, the emergence of omni channel. It is perhaps worth noting that the changes to retail are not necessarily new or ground breaking when compared to the former retail changes and innovations from several decades ago. For today's retail changes, online and digital showrooms and interaction with customers that capitalize on convenience shopping are reigning supreme for the customers' needs and wants. In the past the former Canadian retailer Sears incorporated this similar method with their Sears Catalog in the decades before the internet. Where Sear's catalogs are known as "*traditional direct marketing channels*" (Verhoef, 2015, p. 175), there were perhaps not as attractive for customers close to a Sears BM store, however for customers in rural areas or a far distance away from a Sear's location, the catalog was a very attractive incentive for shopping. Particularly with Sear's once providing pick-up depots for customers that phoned in their orders to these locations before purchasing. This method is perhaps best compared to today's click-and-collect retail strategy, the difference being the medium in which it is conducted.

The uses of BM Stores with Online Retail

For many retailers, the single-channel retail strategies of exclusively BM retail or online retail have been the only channels to utilize. However, with recent retail changes and shifting strategies, the understandable decision for retailers was best to "*have initiated multi-channel strategies*", (Verhoef, 2015, p. 174). Typically, the first transition from single-channel retailing, is the integration of BM stores with online retailing services. For example, Pozzi (2013) with the use of household spend data explains how these two retail channels function together. Pozzi explains and verifies that when BM stores and online services, for a grocery chain retailer, operate to provide services to customers in a timely manner to expand their trade area for customers, revenue and sales will increase. Within her paper Pozzi examines household expenditure data for what households spend on BM and online interactions when shopping. Of course, there are a plethora of factors that affect and change the total expenditures households have on grocery shopping whether it is on BM or online. A major factor that affects the total expenditure of households and the decision making of grocery retailers (or any retailer for that matter) is the presence of competition and their exact use of retail strategies. If there are multiple retailers within a trade area competing for the same customer base, and one of the retailers has BM stores with online retail capability, it can be reasonably expected that when that retailer sees increased online sales, two reactions will occur

(Pozzi, 2013). The first is that the retailer in question will have the “*monopoly in the Internet segment*” (Pozzi, 2013, p. 571), and that the other competing retailers will transition and adapt to having online capability due to the loss in sales. The combination of BM stores with online retailing is also considered multi-channel retailing. Following the transition to multi-channel retailing is the next transition to omni channel retailing. However, before delving into how omni channel functions, there are other retail channels that need context, as they also incorporate the same single-channels that omni channel does, but with varying strategies that focus on capturing customers differently.

Multi-channel as Galipoglu (2017) defines, is the incorporation of several single channels together into a retail system, including BM stores and online showrooms, which sell and distribute products to customers. Through this channel, the ability to capture potential customers and subsequently provide services to them through physical stores and/or online services, is understandably greater than with use of a single-channel. However, in comparison to omni channel, multi-channel lacks in effectively integrating the passage of customers between the channels that it utilizes (Galipoglu, 2017). For example, a retailer that uses multi-channel could have gained a new customer from their interactions at a BM store, however, if this customer wished to purchase at the retailers online showroom, and pick up the item(s) at the store, they would not be able to. Galipoglu explains that for multi-channel retailers, “*individual distribution channels in a multi-channel system operate in a merely parallel but rather uncoordinated manner*” (2017, p. 367). Where multi-channel retailers operate several single-channels for their business but do not connect the channels effectively, cross-channel retailing does. Cross-channel also incorporates several single-channels with the addition of minor integrated interactions that are compatible between the channels, so as to better provide services (such as click and collect) for the customer (Galipoglu, 2017). The difference between multi-channel and cross-channel in comparison to omni channel, is that while the two retail channels may integrate online interaction with BM stores in a way to sell products or smooth interactions differing single-channels, omni channel does both through the seamless integration of services to customers virtually and physically from BM retailing and online retailing (Alexander Hübner, 2016). Within omni channel, there are BM stores and online services however, while these channels are primary locations for sale of products, they are not the primary focus for the retailers and their retail strategy. Whereby BM stores provide the main physical representation of the retailer with the ability to provide services that can be coordinated with online interactions. Conversely, the online segment of omni channel provides ease of use to customers and supplements its services virtually with mobile devices within the physical domain of the stores. For instance, a person who is connected to a retailer’s BM wireless internet, could be directly contacted with pertinent information on sale items and promotions or provided with reward points upon purchasing items. Many retailers have combined the previous two single-channels (BM and online) in order to maintain an online presence with their physical stores.

The Demand for Space in Canada

The demand for space in the realm of retail has always been an integral part of a successful business. It provides physical locations for customers to go and interact with and purchase products from the retailers themselves. The greater amount of space a location has the greater the ability to hold and display products for sale. Depending on the retail sector, the importance of having physical locations vary. For instance, grocery is perhaps the most dependent on physical locations, as the products are everyday items with expiry dates that need to be seen and decided on by customers' in-person. With the emergence of online retailing, the display of products and information on prices, promotions, deals, and other important information to be provided instantly to the customer (e.g. Amazon). Generally, BM stores are expected to hold considerably quantities of products for display and sale at their locations, of which the quantities are dependent on their respective retail sector and the format of each store (Bhatnagar, 2014). Of the products retained at BM locations, there are infrequently sold items that will often stay on the shelves for extended times and can be financial burdens on retailers. While there may be inventory systems that are mitigating this issue, there are other solutions. A solution to this is for retailers that utilize online retail with their BM stores, to transfer the hard to sell items to the digital showroom and house them physically in warehouses solely for online delivery/distribution (Bhatnagar, 2014). With the understanding of the demand for space with retail, this problem of wasted space with products that do not sell quickly in traditional BM stores. Retailing is about competition between similar retailers however, as Leng (2012) describes, once competition for pricing a product is reached, the changes in retail space begin. For a retailer, when facing the decision to close a location, the change to create more space (in existing BM stores) for customers to select and purchase products from, can affect the decision on keeping certain location open. Of course, this is not a fix all solution when other negative factors in closing stores are considered, but when changing the use of space is leveraged correctly, it is quite powerful. In addition to temporary fixes that affect the products within stores, it has been noted with many of the retailers being examined in the paper that changes to the store formats is occurring. While this is explored further in the following chapter, the formats are being changed to accommodate for sale space with providing space to allow customers to interact directly with the brand/retailer (e.g., the latest generation of Best Buy stores).

The Implications of Retail Closure

As mentioned previously, the closure of retail stores indicates important economic change in the location from which it is leaving, no matter the size of the area. As indicated by Cavan (2016), there are four categories for which stores close; *underperformance*, *trade area alignment*, *bankruptcy*, and

opportunity realization. Cavan defines how and why retailers fail or close stores under these four categories with real-world examples and statistics. The category of bankruptcy is the most important as bankruptcy is caused by poor sales, infrastructure, and not closing certain underperforming locations so as to keep the main company running. When retailers do not evaluate their business plan and readjust locations to fit the customer base or move to new locations that do, they typically close in the near future. Trade area alignment is when retailers have their target populations become too small, this commonly affects rural town retailers. Bankruptcy is the most devastating category as it is the end of the retailer with complete store closure and liquidation of assets to settle costs. The final category, opportunity does not relate with the success or failure of a retail, it is simply the opportunity to gain capital on an investment. This investment being the land on which the retailer runs their business, when an offer is given to the retailer that is better than what the location will make, it is sold off, and the location is closed. For instance, a Nordstrom in Vancouver once held a large square footage space and although not confirmed, may have sold a portion of the space to H&M for their Vancouver flagship store (RI Brief, 2019). This additional concept to Cavan's categories of retail failure can be confirmed by Leng's reasoning that changing retail space can benefit a retailer's business model.

With the four patterns of BM store closures being defined, an understanding is needed of the effects that online retailing has on BM stores. Described as "*digital transformation of retailing*", (Editorial, 2017, p. 264), the online and physical retail worlds are being combined together. There has been a measured increase in online sales in recent years and while physical retailing holds the majority in sales, retailers are noticing the importance of utilizing both. For instance, "*online retailers are establishing new physical store concepts as a complement to their online business, and physical stores are often considered a key component in the omni channel concept*" (Editorial, 2017, p. 264). This means that while physical stores will still hold, display, and sell products, they also will be extensions of the online face of the retailer. Using extensions of the online/digital interface to provide services that cannot be replicated online and provision of convenience to the customer. Such as product support and expert repairs, or in-store pick-up and drop-off service, all organized through a mobile phone. Retail stores have traditionally closed due to the four key reasons defined above, however, the new wave of omni channel business models, a fifth reason for BM stores to change has emerged. This new reason is the BM store transition, being that physical stores are being repurposed, to provide more of a showroom and experience service provider, in addition to (albeit potentially reduced capacity) the traditional transactional uses. This new trend will be touched on when discussing the individual retailers for this major research paper, however, Best Buy, Staples, and Marks have been recently updating their BM store formats and even re-inventing and introducing new logos into their business plans.

Chapter 3: Data and Store Per Capita Methodology

Data

The data for this major research paper was provided by the Centre for Study of Commercial Activity (CSCA). The data covers a time frame of 2013 to 2018. Within this data, are the exact locations and all pertinent retail information on every physical BM store for the 12 retailers, specially selected for this major research paper, that exist in Canada. Within the entire data packet from the CSCA, each year has an associated excel file that has for each BM store (for the associated retailer) the address, postal code, NAICS code, shopping centre ID, X and Y coordinate, and CMA and CSD name and code. All of this information provided within the data was pertinent to conducting the analysis that was performed in this major research paper. As mentioned previously, the retailers that were selected for this research are: Metro, Loblaw's, Longo's, Best Buy, Staples, The Apple Store, Mark's, Indochino, H&M, Dollarama, Sleep Country Canada, and IKEA.

Retailers and the Distribution Graph

Figure 1 is the reconstruction of Lionel Binnie's graph from his book; *The Future of Omni-Channel Retail*. This figure is provide for visual guidance for understanding the placement of retailers in figure 2. Figure 2 provides a visualization of the Retailer Distribution Graph (RDG) conceptual model for the relationship between customer engagement and product type (Binnie, 2018). The graph, was created repurposed from Binnie's graph seen in Figure 1 for this major research paper, where it places retailers into 4 specific quadrants along two retail dimensions. The *x*-axis represents the type of retail products, depicting the Homogenous products on the left of the axis and the Heterogeneous products on the right of the axis. This range on the *x*-axis is dependent on the retailer and their retail sector. The retail sectors in the context of this major research paper, consists of three of the selected set of retailers. The *y*-axis is represented by the engagement of consumers based on the products. This is depicted with low engagement at the bottom and high engagement on the top. For the *y*-axis, the bottom of low engagement products for customers are the cost-efficient items that are purchased frequently and intended for functional use. The high engagement products are the more expensive purchases being are made less frequently, involving time and research by the customer before purchasing and are an extension of the consumer's lifestyle. The four resulting quadrants define retailers based on products and engagement. The **Unique** quadrant is High engagement Heterogeneous products, think custom suits and unique furniture. The **Elite** quadrant is the High engagement Homogeneous products, think cars, electronics and fashion

accessories. The **Artisan** quadrant is Low engagement Heterogeneous products, think natural high-grade foods. The final quadrant **Mundane** is Low engagement Homogenous products, think basic home supplies and grocery stores. Through this categorization of the four quadrants (Mundane, Elite, Unique, and Artisan), it has been shown in Binnie's research, that certain quadrants are prone to have retailers that typically close locations when in transition to omni channel retailing, or in direct competition with other retailers that use omni channel retailing. These quadrants being: elite and unique, the reasoning for this is due to the fact that along the y-axis of engagement, the higher the engagement between the customer and the retailer the higher online research is paired with the necessity of in-person interaction and purchasing (Binnie, 2018). The twelve selected retailers provide complete coverage in the four defined quadrants by Binnie and are visualized in the RDG.

The reasoning for selecting retailers within the four sectors was for the purpose of including major retailers in the main retailing sectors seen within Canada. Additionally, the placement of the retailers in their respective quadrants was based off of Binnie's graph in Figure 1. Although it is described why each retailer was chosen further into this chapter, it was through the research and understanding of each retailer and the use of figure 1 as a template, that their placements within the RDG were specific and accurate. The artisan quadrant, consisting of Longo's and Loblaws while similar to one another, **Longo's** possessed more heterogenous or harder-to-find products, with **Loblaws** requiring less engagement from retailer with the customers for understanding the products available. The Unique quadrant, consisting of Indochino, Sleep Country Canada, and Mark's, all being unique and niche Canadian retailers in their respective sectors were similar in respect to the x-axis as they provide heterogenous products. However, they vary in terms of engagement as **Indochino** required engagement with the retailer and a customer in order to have a product that could be purchased. The same can be said for **Sleep Country Canada**, albeit less than Indochino, as engagement can vary by product and customer preferences. **Mark's**, with the lowest engagement in unique, still requires minor engagement, as much of their products are for customers that use their products at work. Therefore, product descriptions and recommendations based off customer needs are given from brand representatives. The Elite quadrant, consisting of Apple, Best Buy, and Ikea, are all products similar to those provided by their respective competitors (not included in this major research paper), while having varying degrees of necessary engagement between the customer and the retailer. **Apple** stores are primarily for the presentation and sale of electronic products; however, they are also for the engagement between the retailer and customers for the products and for services (repair, troubleshooting, product customization). This is the reasoning as to why it is the highest for engagement in the Elite quadrant. **Best Buy** provides the most homogenous products in its respective retail sector and when purchasing many products within the store, a representative must retrieve and accompany the customer to the register. **IKEA** provides products that are homogenous and require minimal engagement,

outside of requiring a representative to assist with retrieving products. The Mundane quadrant, consisting of H&M, Staples, Dollarama, and Metro, are all products that are highly similar one another and generally require little to no engagement between the retailer and the customer. **H&M** in comparison to figure 1, provides basic clothes that generally require minimal engagement between the retailer and the customer. **Staples** provides homogenous electronics goods and office stationary, often with little to no engagement between the retailer and the customer. **Metro** provides the enough homogenous products and minimal engagement in the grocery sector to fall within the mundane quadrant in comparison to the other grocery retailers. **Dollarama** is the most representative retailer for the mundane quadrant with homogenous products with often no engagement required between the retailer and the customer. The graph seen in figure 1 was a guideline to know where it was appropriate to place a retailer in the RDG seen in figure 2.

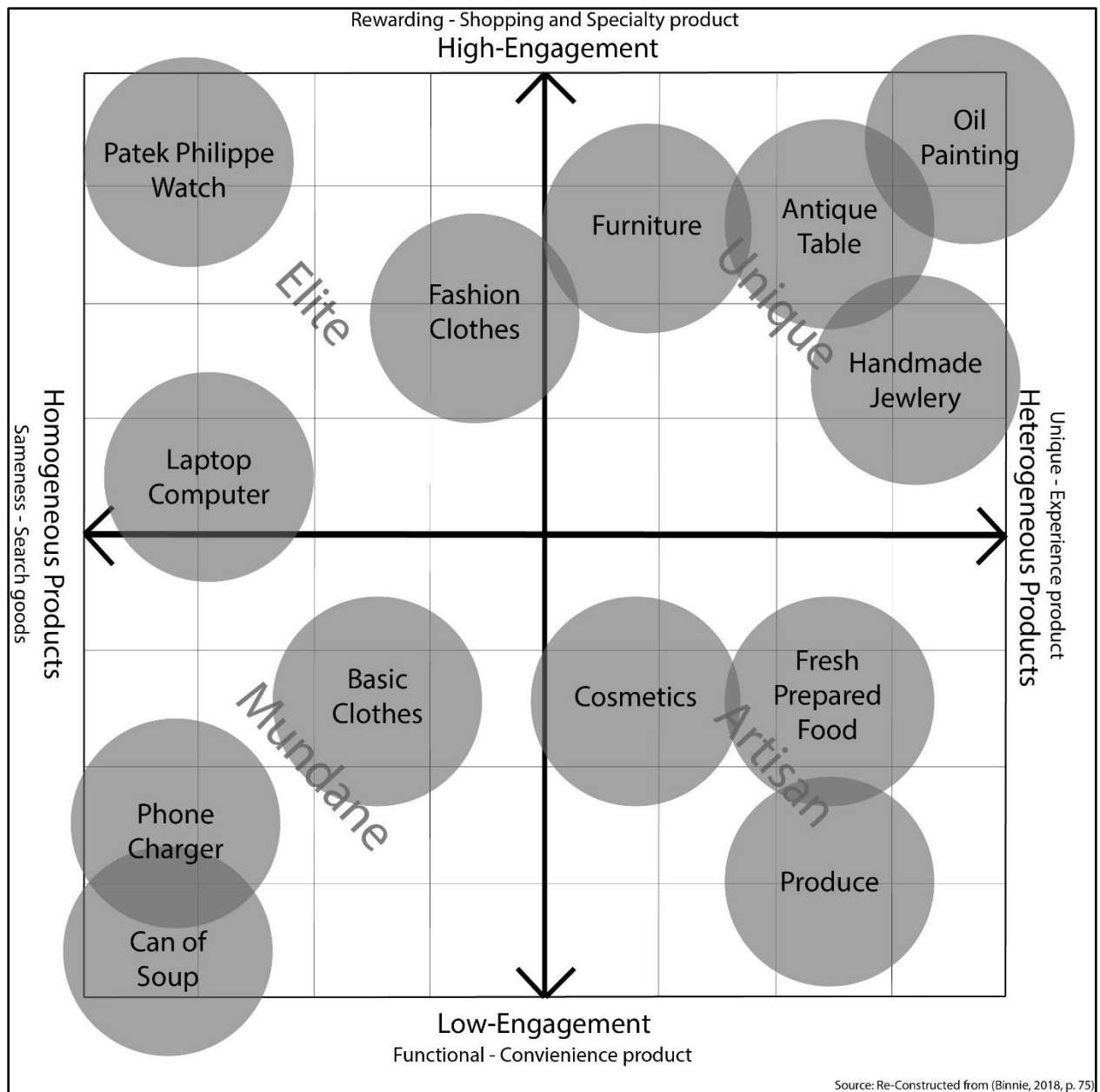


Figure 1. Re-constructed Graph from: *The Future of Omni-Channel Retail* by Lionel Binnie

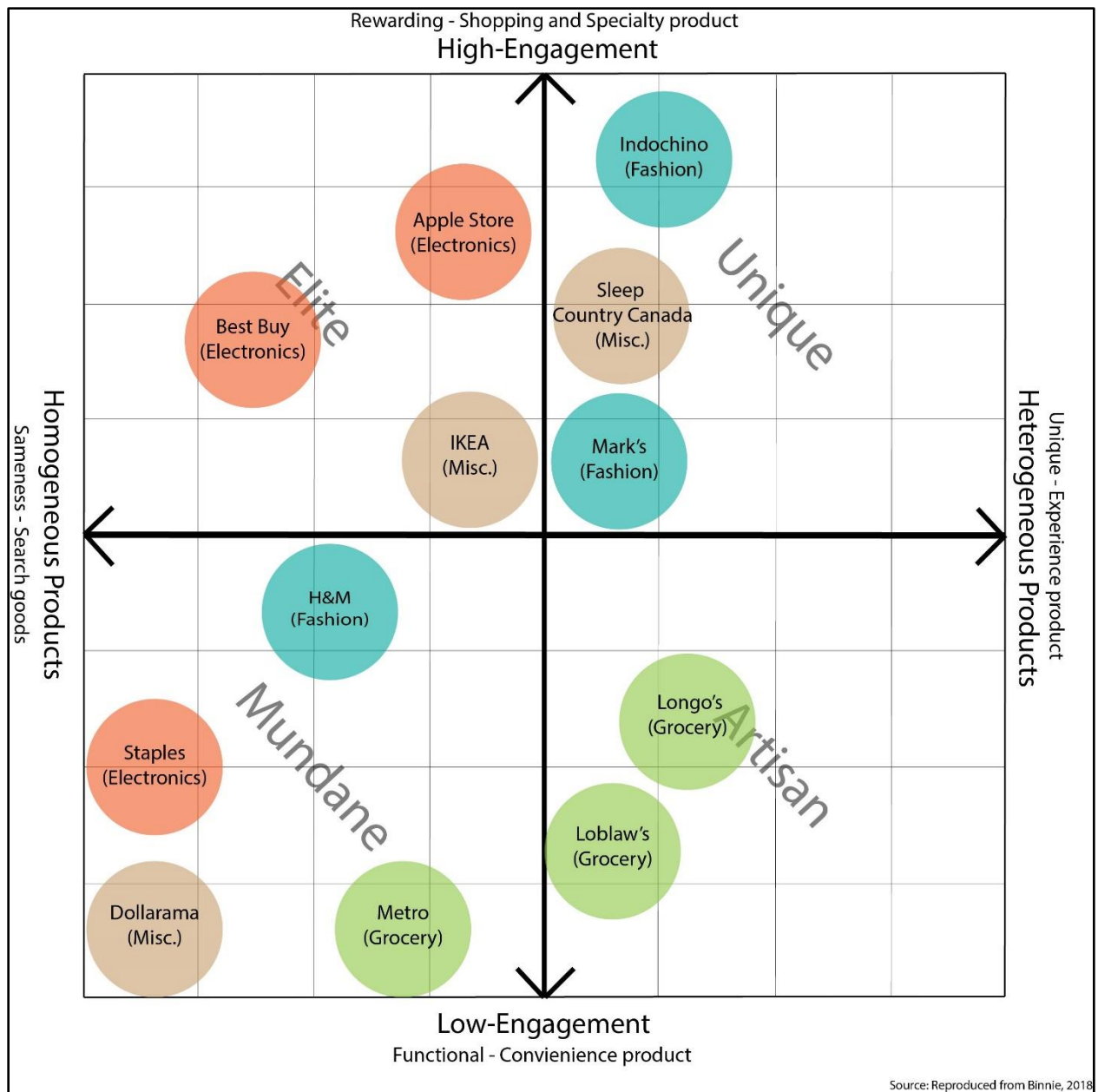


Figure 2. Retailer Distribution Graph

Grocery

The reason grocery and food were chosen as a category is due to its staple importance in retail. The grocery sector is the only sector that can blend the mix of online and BM services, while having a mandatory requirement to have BM stores to provide the products. This is because of the fact that food needs to be physically seen and touched to confirm quality, and the majority of products sold have turn-over rates (food expires/spoils) that do not allow for extended delivery times. The following retailers were selected to represent the Canadian grocery retail sector for this research; Metro, Loblaw's, and Longo's.

Metro Inc., a Canadian grocery retailer based in Montreal and has locations in both Ontario and Quebec. With its Canadian roots, abundance of BM locations in two of Canada's top cities, and having recently undergone changes to their retail structure, Metro was a top choice. For context on what Metro changed to their retail structure, in late 2017 Metro extended their online shopping capabilities to service 60% of Quebec (5 million people) with same-day and next-day delivery services (Powell, 2017).

Loblaws, is a major Canadian grocery retailer based in Brampton Ontario, and with locations in British Columbia, Alberta, Quebec, and Ontario. Similar to Metro, Loblaw's is a Canadian retailer with a foothold in twice as many provinces, it is a well-known and respected grocery retailer. What Loblaw's has done to evolve and prepare for the next generation of grocery retail is using its already existing assets to its benefit. Loblaw's has held its PC Optimum database for many years, with data on 16 million customers. Loblaw's has created a carbon copy of Amazon Prime with discounted prices and deliveries for loyalty customers (Charlebois, 2019). With this paid subscription service, customers receive free deliveries, and Loblaw's gains from introducing itself to omni channel grocery retailing with its own loyalty services (while minimizing the competitive threat of Amazon's Whole Foods acquisition). Additionally, Loblaw's has been seeking to expand both data and analytics operations in order to optimize existing services for click-and-collect and supply chains for deliveries. This is done in-part by increasing the number of self-checkout stations and providing more options to click-and-collect services including cooked meals and last minute online order changes (Laird, 2019). With the use of in-house customer datasets and optimizing current services with data and analytics, Loblaw's has begun to combine the BM stores with their virtual services.

Longo's is based in Vaughan and operating in Toronto and Hamilton, with recent store expansions in Guelph and Ajax. Longo's provides a high-quality range of products at equally high price point. Longo's was introduced to online grocery retail earlier than the other chosen retailers, with the acquisition of Grocery Gateway in 2004 (Retail Insider, 2016). Grocery Gateway is an online service that provides same day deliveries of food and alcohol, meaning that there is a delivery and product partnership between Longo's and the LCBO (Baldinger, 2019). Therefore, with Longo's retaining over a decade of

experience with online grocery services, partnering with similar business to capture customers, and expanding into new markets (in Ontario) in recent years, Longo's has a strong lead in the changing Canadian retail market.

Miscellaneous

The reason the category of miscellaneous retailers was chosen is because of the prevalence of online retailing in this category. This is in part due to the fact that the products in this category are typically nonperishable (i.e., household products and toiletries), come in an array of sizes, and span niche to general needs. The following retailers were selected to represent the Canadian miscellaneous retail sector for this research; IKEA, Dollarama, and Sleep Country Canada.

IKEA was chosen as one of the retailers for the miscellaneous category because of their emerging prevalence in Canada and use of online services despite the products being offered generally needing to be seen and handled by the customer prior to purchase. Ikea, headquartered in the Netherlands, operates fourteen locations throughout Canada. In 2017, IKEA was among some prominent retailers to utilize the retail strategy of populating temporary retail space for pop-up stores to provide brand presence and customer interactions, this was done on Queen Street West in Toronto (Retail Insider, 2017). Ikea has also begun utilizing online retailing methods including click and collect services. Whereby they have a fleet of vehicles for transport for direct delivery of products to customers.

Dollarama was chosen as one of the retailers for the miscellaneous category because of their well-known presence as a retailer of common household products at affordable prices. Dollarama is a Canadian retailer that is headquartered in Quebec and has BM locations in nearly every province in Canada. For several years Dollarama has maintained well over 1000 BM stores throughout Canada in fact, it was because of the announcement in 2014 to open 400 more locations that this hallmark was achieved, and to-date has been maintained. In addition to Dollarama greatly expanding its BM store presence, in early 2019 Dollarama introduced its first online store for bulk purchases. This new online store was perhaps developed due to the competitive pressure from Costco providing products in bulk at affordable prices at flat shipping rates would provide a competitive edge (CTV News, 2019).

Sleep Country Canada was chosen as one of the retailers for the miscellaneous category because they are a well-known retailer of household/bedroom products. Sleep Country Canada is a Canadian retailer that is headquartered in Ontario and has BM retail locations throughout all of Canada. In fact, within the last two years Sleep Country has been acquiring competitors and expanding their business. With the emergence of the niche retail category of 'Mattress-in-a-box', many new and highly successful

businesses have adopted this retail product in direct competition with Sleep Country Canada. In late 2018, the Toronto based company Endy was acquired by Sleep Country for just under 90 million dollars, and Endy retains their logo while under their new ownership (Patterson, 2018). Endy being of course one of the Mattress-in-a-box retailers, in addition to the other well-known emerging retailer Casper. In addition to the acquisition of Endy, in early 2019 Sleep Country also partnered with Walmart to create and launch an online Mattress-in-a-box retail platform that will directly compete with the emerging retailers looking to gain a foothold in the retail of mattress and bedroom products (Siwak, 2019). With these expansions of both BM stores and introducing online retailing (albeit in a limited capacity as a partnership), Sleep Country Canada has shown recent adaptation to the changing retail landscape.

Electronics

The reason the category of electronic retailers was chosen is because electronic consumer goods retain a large portion of consumers when looking at the retail environment as a whole. This is in part due to the fact that the products in this category are high in demand, considered status symbols, and are integral products for the technological consumer. Electronic retail products are commonly purchased online and collected in-store at a later time. The following retailers were selected to represent the Canadian electronics retail sector for this research; Best Buy, Staples, and the Apple Store.

Best Buy is an American multinational retailer of electronic consumer goods that has been in business for over 50 years, and currently has BM locations across Canada. An indication of Best Buy Canada's current business plan is the renovations of major and flagship BM stores across Canada. In 2017, Best Buy renovated a Montreal location into an "*Experience Store*" (Toneguzzi, 2017), to better interact with customers and integrate experience based methods sources from customers themselves. These nation-wide renovations of traditional BM stores into experience stores have been steadily completed through the last few years, this includes the Best Buy in Toronto's Eaton Centre.

Staples is a Canadian office supply retail chain that fits into the electronic retailer category as a significant portion of the products sold by Staples are in fact electronic goods. Furthermore, it is from numerous reported closures that Staples began in 2014 with rebranding and integrating new business initiatives that have been initiated by Staples within the past two years. Specifically, in 2019, Staples opened their flagship new store presenting its new brand logo of Staples Studio. This flagship introduces the affordable space for customers that are entrepreneurs, business professionals, and students, while providing products and an interactive space to work and learn in their respective fields (Patterson, 2019).

Apple or more specifically, the physical BM Apple Store is an American technology company that is amongst the most well-known companies in the world, where they provide technology, services, and online payment methods, products, and interactions that fit perfectly in the electronic retailer category. Apple Store's BM store format is iconic, innovative, highly efficient and productive enough that in 2013, it was trademarked by Apple (Retail Insider, 2013). Therefore, the store experience provided by Apple as a created environment for which customers can see and interact with every product is no longer an option for other retailers to adopt.

Fashion

The reason fashion was chosen as a category is due to its large prominence as a main sector of retail. The fashion sector possesses the ability to exist in retail with a presence of exclusively BM services, exclusively online services, or as a mix of online and BM services, while having moderate success. This is due to the fact that fashion (i.e. clothing), while sometimes needing to be physically touched and fitted to confirm quality before being purchased, the majority of products in fashion can now be purchased remotely. The following retailers were selected to represent the Canadian fashion retail sector for this research; Mark's (formerly Mark's Work Warehouse), Indochino, and H&M.

Indochino is a Canadian high-end fashion retailer for custom men suits that was originally an exclusively online retailer that has recently expanded their business to include BM stores. Indochino has recently been re-introducing new BM store front formats to better enhance customer experiences and interactions when getting tailored for custom suits and outerwear (Patterson, 2019). In fact, following the retail trend of investing in retail pop-ups, Indochino placed temporary showrooms throughout Canada as a form of trial entries into BM stores before implementing permanent BM stores. The first BM store being located in Vancouver in 2014 (Patterson, 2017).

H&M is a Swedish multinational clothing retailer that has been in business for over 70 years. H&M has in the last 5 years been reshaping their BM store formats and introducing flagship stores to capture the largest consumer markets in Canada. The evidence behind this is through the reveal of the Toronto flagship in CF Eaton Centre hosting a corner on Toronto's busiest street in 2016. This flagship hosting over 50,000 square feet on 3 floors, also introduced H&M's new Home Collection of products (Retail Insider, 2016). In addition to the Toronto flagship in 2016, H&M in early 2019 revealed Vancouver's flagship in CF Pacific Centre hosting another large format BM store with over 30,000 square feet (RI Brief, 2019).

Mark's is a Canadian retailer of clothing that is based in Calgary and has been in business for over 40 years and is the leading retailer in men's clothing in Canada. In 2015, Mark's rebranded from Mark's Work Warehouse and opened a prototype BM store that organized its store with dedicated areas representing brands that Mark's sells to customers with interactive displays and kiosks (Retail Insider, 2015). Mark's has also fallen in step with the recent retail trend of utilizing temporary pop-up stores, in Halifax, Toronto, and Calgary as a means of approaching new customers differently that could benefit existing BM stores (Toneguzzi, 2017). Recently in 2019, Mark's revealed a concept store for malls in Calgary that changes the customer experience, by emphasizing on functionality and authenticity of the products that Mark's provides in a new format (Toneguzzi, 2019).

Methodology Overview

The methodology for this research involves examining the changing store footprint for a selected set of major retail chains operating in Canada from 2013 to 2018. The data analysis is organized into 3 distinct themes of organization, first is each of the 12 retailers being examined individually, the second is the quadrants in which the retailers are organized in the RDG, and the third is by retail sectors. The reasoning for organizing the retailers in this manner is to fully uncover what and where the retail changes are taking place across Canada. The retailers individually examined with their openings and closures across Canada will provide the most specific details for who exactly is currently in transition, formerly in transition (based off of the temporal range of 2013 to 2018), whether the transitions are positive or negative. The quadrants that were defined by Binnie (Mundane, Elite, Unique, and Artisan), and visually incorporated in the RDG for this major research paper, categorizes retailers based off of customer interaction and the available products. The final organization of the retailers is the retail sector, based on the specialty or general type of product provided to consumers.

The first and primary indicator is percentage change over time. The importance of percentage change is straightforward but effective and provides information on growth or decline for the Retailers, Quadrants, and Retail Sectors. The second indicator is the store format type. Retail structure in Canada has a plethora of formats however, they can be easily categorized into 4 distinct types. These types being: Power Centre, Regional Mall, Neighbourhood Mall, and Free-Standing buildings. The importance of this indicator is that these types help define the consumer base and to an extent the potential population size of consumers that the retailers are targeting. This could indicate a change in their retail strategy, where as they are trying to capture a smaller niche population of consumers that fit their business plan. The final indicator is the Canadian population centres. Within Canada there are several population groupings that are officially defined by Statistics Canada. The first and primary population centre is a Census

Metropolitan Area (CMA) which hosts 100,000 or more people (Statistics Canada, 2018). Following the CMA is the Census Agglomeration (CA) hosts 10,000 or more people (Statistics Canada, 2018). The final and smallest population centre is a Census Subdivision (CSD), which defines the smallest named locations throughout all of Canada. The CSD's can be considered a part of CMA's or CA's for a number of reasons, however, the main rule is that they are physically located within them. These 3 population centre classifications provide enough detail to describe which consumer markets; individual retailers, quadrants, and retail sectors are currently in or transitioning to or from.

This analysis was conducted in Alteryx, a software that combines data science with analytics. Alteryx workflows were created for the Individual retailers, Quadrants, and Retail sectors, respectively. For further context in what was conducted in Alteryx, the step-by-step process is outlined in Appendix A. The workflow tools, components, and formulas are identical for all other retailers, quadrants, and retail sectors. Figures 2 and 3 show the 2 main parts of a workflow, that when explained together provide a complete overview of the workflows constructed in Alteryx. Figure 2 shows the complete operation of processing the CSCA data from 2013 through to 2018, selection of pertinent fields, implementation of formulas, and the union of all information across all years into the desired table format. Figure 4 is simply the final join of multiple Figure 1 workflows and sortation of the combined information into 4 different excel spreadsheets. The 4 different excel spreadsheets, the first being the full data range of statistics being examined and the following 3 being the indicator breakdowns. The excel spreadsheets being:

1. The full range of information of the three indicators (percentage change, store format, and population markets)
2. Store counts and Percentage changes
3. Store formats as counts and their percentage changes
4. Population markets as counts and population numbers with percentage changes for both.

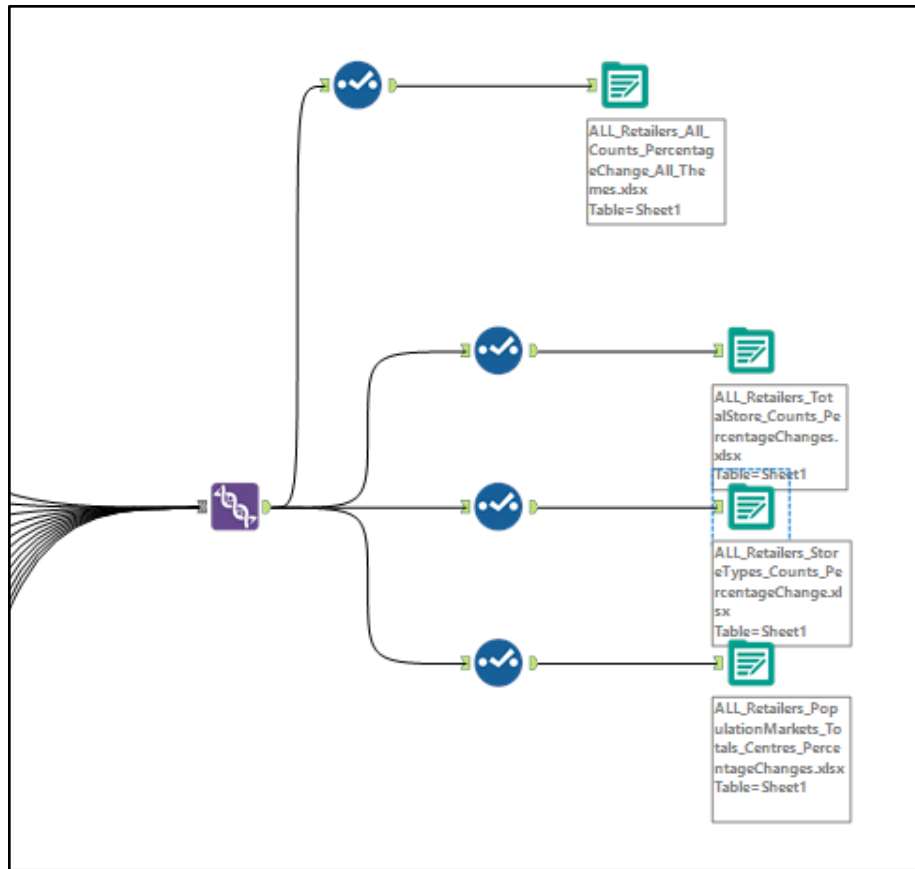


Figure 4. Alteryx Full Workflow (Part 2 of 2) Final Section

Chapter 4: Analysis Results and Discussion

All results in this chapter is organized into the corresponding themes outlined throughout this major research paper. As are numerous tables and figures, the majority of the results that pertain specifically to each retailer, retail sector, and quadrants will be located in Appendix B. This chapter will frequently make reference to Appendix B. It is important to note that for the comparison for each retailer between 2013 and 2018, that the results noted do not account for any chain format changes.

Retail Sectors and their Individual Retailers

Electronics Sector

The Apple Store

The results of the analysis of store per capita is seen comparatively in Table 1, and individually in Appendix B as Table 6 and Figure 8, for a summarization of 2013 to 2018 for the Apple Store retailer. Apple's stores are located in 6 of the 10 provinces included in this research. The primary population market for the Apple Store is Ontario, this is due to the maintained total store count of exactly 11 representing nearly 40% of all stores. These stores also provide service to exactly 42% of the total population of Canada the Apple Store has access to. The secondary population markets include Quebec, Alberta, and British Columbia, where they service a combined 51.9% of the total population of Canada that Apple services, with 53.6% of the total stores from 2013 to 2018. All of Apple's stores are located within a CMA and the percentage change from 2013 to 2018 for total store counts has not changed. This fact is understandable as Apple, for the time frame of this research has maintained a consistent 29 BM stores throughout Canada. As discussed in the methodology for the explanation for selecting each retailer in this major research paper, Apple has a registered patent their BM store design. It is perhaps with this perfected setting for interactions with customers, paired with their ideal BM store placements in Canada that they have neither increased nor decreased the number of stores. Additionally, in figure 8, the exact locations of Apple's BM stores is depicted for both 2013 and 2018. From the results of the Apple Store, it is evident that the retailer has not closed or opened any BM stores in Canada and is a retailer that has not increased or decreased the number of BM stores in its respective sector and quadrant.

Best Buy

The results of the analysis of store per capita is seen comparatively in Table 1, and individually in Appendix B as Table 7 and Figure 9, for a summarization of 2013 to 2018 for the Best Buy retailer. Best Buy's stores are located in all 10 of the provinces of the research study area. The primary population market for the Best Buy is Ontario, this is due to the store count of 33 for 2013 and 53 for 2018 representing 47% and 40% respectively of all stores. These Ontario stores also maintained service to over 40% of the population of Canada that Best Buy had access to. The secondary population markets include Quebec, Alberta, and British Columbia, where they service a combined 47% for the total population of Canada, with the total percentage of stores being 42.8% in 2013 and increased to 48.1% in 2018. Almost all of Best Buy's stores in 2013 were located within a CMA, however in 2018, stores not in CMA's appeared. The percentage change from 2013 to 2018 for total store counts doubled for nearly every province. This fact is understandable as Best Buy, during the time frame of this major research paper, acquired the former Canadian electronic consumer goods retailer Future Shop. A large portion of these BM stores for which Best Buy has grown its business, are from transitioned stores of 'Future Shop', which was acquired by Best Buy in 2001 and defunct (closed) in 2015. While not presented here in the major research paper, through the data processing conducted in Alteryx, between 2014 and 2016, Best Buy experienced an increase in store locations. However, before Future Shop closed officially and transitioned to representing the Best Buy brand, in 2013 Best Buy had closed 15 locations across Canada from both brands. This was outlined by the Financial Post as action by Best Buy in response to "*pressure from online electronics retailers such as Amazon and Apple*" (Shaw, 2013). Despite these closures, Best Buy in 2018 opted not to close the Best Buy Mobile small format stores, which was what the USA Best Buy counterpart decided to do with all of their 250 Mobile stores (Patterson, 2018). This decision was based off of the fact that Best Buy Canada held 56 stores in the Mobile format, which is 20 percent of what Best Buy USA consisted of, while Best Buy Canada held a greater penetration into the population than that of their USA counterpart. What can be gathered from this is that while Best Buy absorbed many of Future Shop's BM stores, not all of them were suitable for the Best Buy business plan. Furthermore, as Best Buy has maintained relative success in relation to international counterparts, it also maintains the presence of its BM stores. Therefore, from the results of Best Buy, it is evident that the retailer has opened more BM stores than it has closed in Canada. This can be seen in the comparison columns of Stores in CMA vs Stores not in CMA, as there are clear increases of stores both in major population markets (over 1,000,000), and in smaller population markets (under 1,000,000). As these store counts in smaller markets are minor at under 8 stores, this perhaps means that Best Buy is opening in more rural areas as a trial to evaluate catering to these markets. As such, Best Buy is a retailer that has been increasing the number of BM stores in its respective sector and quadrant.

Staples

The results of the analysis of store per capita is seen comparatively in Table 1, and individually in Appendix B as Table 17 and Figure 19, for a summarization of 2013 to 2018 for the Staples retailer. Staples stores are located in all 10 provinces included in this research. The primary population markets for Staples is Ontario and Quebec, this is due to the total store count of 198 in 2013 and 174 in 2018 representing nearly 60% of all stores for both years. These stores also provide service to nearly 64% of the total population of Canada that Staples has access to. The secondary population markets include mostly Alberta and British Columbia with all other provinces following behind, covering population markets of less than 1 million people. The majority of Staples stores that are located within a CMA. The percentage change from 2013 to 2018 for total store counts has been primarily negative with the East cost of Canada maintaining a 0% change. This fact is understandable as Staples, has over the past 5 years, been under serious business reform. In particular, in early 2014, Staples announced that by 2015, 225 North American BM stores would be closed (Staples Canada, 2014). This is sign of significant change within Staples to transition to either accommodate for omni channel competition or into omni channel itself. As discussed in the methodology for the explanation for selecting each retailer chosen in this major research paper, Staples has introduced a new brand and has been introduction retail format changes in their existing BM stores. As such, Staples has been closing a considerable number of BM stores in its respective sector and quadrant.

The results of the analysis of store per capita is seen comparatively with retailers in Table 1, and as a whole in Table 18 and Figure 20, for a summarization of 2013 to 2018 with the retailers encompassing the Electronics sector. The electronics retail sector consists of Apple, Best Buy, and Staples. Within figure 20, it can be seen that the electronics sector is present in all 10 provinces included in this research. The primary population market for the retail sector is Ontario, this is due to the maintained total store count of over 170 representing nearly 40% of all stores. These stores also provide service close to 42% of the total population of Canada that electronic retailers have access to. The secondary population markets include Quebec, Alberta, and British Columbia, where they service a combined 48% of the total population of Canada that electronic retailers are servicing, with close to 47% of the total stores from 2013 to 2018. The percentage change from 2013 to 2018 for total store counts had increased across nearly every province. This fact is understandable as with the results from the retailers:

- The Apple Store was a retailer with 0% percentage change.
- Best Buy was a retailer with 70% and greater percentage changes.
- Staples was a retailer with numerous store closures and negative percentage changes for the majority of provinces their BM stores were located in.

The implications of each retailer of the electronics sector is providing; no BM store changes, BM store loses, and BM store growth, means that the sector is either increasing or decreasing BM store counts. For the electronics sector with the retailers being examined, the sector has experienced a 7.96% increase in total BM stores. This indicates that the electronics sector overall, has not been negatively affected in the retail changes across Canada. In comparison to the other retail sectors, electronics ranks third in greatest percentage change.

Table 1. Electronics Retail Sector, Retailers: Retail Store Count by Province & Population Market Size, 2013 to 2018 Comparison

Electronics Retail Sector, Retailers: Retail Store Count by Province & Population Market Size, 2013 to 2018 Comparison																				
Province	Retailer	Population Markets 2013 to 2018 Comparison								Total Store Count		% Change 2013 to 2018	Stores in CMA		Stores not in CMA		% of Total Store Count		% of Total Population	
		>1,000,000		350,000 to 1,000,000		100,000 to 350,000		<100,000												
		2013	2018	2013	2018	2013	2018	2013	2018	2013	2018		2013	2018	2013	2018	2013	2018	2013	2018
Alberta	Apple Store	4	4	0	0	0	0	0	0	4	4	0.0%	4	4	0	0	0.9%	0.9%	4.7%	4.7%
	Best Buy	9	15	0	0	2	4	0	0	11	19	72.7%	9	15	2	4	2.6%	4.1%	4.3%	3.8%
	Staples	26	27	8	8	0	0	4	4	38	39	2.6%	26	27	12	12	8.9%	8.5%	3.8%	3.8%
British Columbia	Apple Store	6	6	0	0	0	0	0	0	6	6	0.0%	6	6	0	0	1.4%	1.3%	4.2%	4.2%
	Best Buy	7	14	0	8	1	0	0	0	8	22	175.0%	7	14	1	8	1.9%	4.8%	4.0%	4.7%
	Staples	23	22	20	20	0	0	0	0	43	42	-2.3%	23	22	20	20	10.1%	9.1%	4.7%	4.7%
Manitoba	Apple Store	0	0	1	1	0	0	0	0	1	1	0.0%	1	1	0	0	0.2%	0.2%	1.3%	1.3%
	Best Buy	0	0	2	3	0	0	0	1	2	4	100.0%	2	3	0	1	0.5%	0.9%	1.1%	1.0%
	Staples	0	0	6	5	0	0	4	4	10	9	-10.0%	6	5	4	4	2.3%	2.0%	1.0%	1.0%
New Brunswick	Best Buy	0	0	0	0	0	3	0	0	0	3	300.0%	0	2	0	1	0.0%	0.7%	0.0%	0.5%
	Staples	0	0	0	0	9	7	1	0	10	7	-30.0%	5	3	5	4	2.3%	1.5%	0.5%	0.5%
Newfoundland	Best Buy	0	0	0	0	1	1	0	0	1	1	100.0%	1	1	0	0	0.2%	0.2%	0.3%	0.3%
	Staples	0	0	0	0	3	3	1	1	4	4	0.0%	3	3	1	1	0.9%	0.9%	0.3%	0.3%
Nova Scotia	Apple Store	0	0	1	1	0	0	0	0	1	1	0.0%	1	1	0	0	0.2%	0.2%	0.7%	0.7%
	Best Buy	0	0	2	2	0	0	0	1	2	3	50.0%	2	2	0	1	0.5%	0.7%	0.6%	0.6%
	Staples	0	0	6	6	4	4	3	3	13	13	0.0%	6	6	7	7	3.0%	2.8%	0.7%	0.7%
Ontario	Apple Store	11	11	0	0	0	0	0	0	11	11	0.0%	11	11	0	0	2.6%	2.4%	14.0%	14.0%
	Best Buy	33	46	0	7	0	0	0	0	33	53	60.6%	33	46	0	7	7.7%	11.5%	14.8%	14.2%
	Staples	100	86	20	20	0	0	7	4	127	110	-13.4%	100	86	27	24	29.7%	23.9%	13.9%	13.9%
Prince Edward Island	Best Buy	0	0	0	0	0	0	0	1	0	1	100.0%	0	0	0	1	0.0%	0.2%	0.0%	0.1%
	Staples	0	0	0	0	0	0	2	2	2	2	0.0%	0	0	2	2	0.5%	0.4%	0.1%	0.1%
Quebec	Apple Store	5	5	0	0	0	0	0	0	5	5	0.0%	5	5	0	0	1.2%	1.1%	8.4%	8.4%
	Best Buy	11	19	0	0	0	3	0	1	11	23	109.1%	11	19	0	4	2.6%	5.0%	7.4%	7.4%
	Staples	55	48	14	14	0	0	2	2	71	64	-9.9%	55	48	16	16	16.6%	13.9%	7.6%	7.6%
Saskatchewan	Best Buy	0	0	2	3	0	0	0	1	2	4	100.0%	2	3	0	1	0.5%	0.9%	0.8%	0.7%
	Staples	0	0	5	5	6	5	0	0	11	10	-9.1%	5	5	6	5	2.6%	2.2%	0.8%	0.8%
TOTALS		290	303	87	103	26	30	24	25	427	461	7.96%	324	338	103	123				

Fashion Sector

H&M

The results of the analysis of store per capita is seen comparatively in Table 2, and individually in Appendix B as Table 9 and Figure 11, for a summarization of 2013 to 2018 for the H&M retailer. H&M's stores are located in 9 of the 10 provinces included in this research. The primary population markets for the H&M is Ontario and Quebec, this is due to the total store count of 42 for 2013 and 62 for 2018, representing 68.8% of all stores in 2013 and 64.3% in 2018. These stores also provide service to nearly

70% of the total population of Canada that H&M had access to for both years. The secondary population markets include all other provinces, with the exception of Saskatchewan, which between 2013 and 2018, closed its singular location. With exception to H&M's primary markets in Ontario and Quebec, the number of stores in CMA's have only increased marginally within the time frame, and stores outside of CMA's have remained for the most part stagnate in terms of growth. This paired with the fact that the majority of stores are located within CMA's, suggests that H&M has found and remained in the population markets that match its business strategy, and that the focus is now on the format of their existing stores. This fact is understandable as H&M, for the time frame of this research has been reintroducing new formats and space expansions in the more prominent stores. As discussed in the methodology for the explanation for selecting each retailer chosen in this major research paper, H&M has been steadily installing renovations and of flagship stores in several provinces. Therefore, with H&M having steadily introduced BM stores throughout Canada in major population areas, particularly in Ontario and Quebec, rural markets are not targets for the retailer. As such, H&M has been marginally increasing the number of BM stores in its respective sector and quadrant.

Indochino

The results of the analysis of store per capita is seen comparatively in Table 2, and individually in Appendix B as Table 11 and Figure 13, for a summarization of 2013 to 2018 for the Indochino retailer. Indochino's stores are located in 5 of the 10 provinces included in this research. The primary population market for Indochino is Ontario, this is due to the total store count of 4 representing 40% of all stores. These stores also provide service to over half of the total population of Canada that Indochino has access to. The secondary population markets include the other 4 provinces. As there is a discrepancy in the data and is discussed in the limitations section of this major research paper, Indochino did not enter Canada's retail market with 10 stores in 2018. They in fact entered initially through online services and physically in pop-ups stores before 2018. All of Indochino's stores are located in CMA's, servicing populations of 350,000 or more people. To continue the discussion in the methodology for the explanation for selecting each retailer chosen in this major research paper, Indochino has consistently been expanding their business in BM stores throughout Canada since 2017 and have been increasing the number of new showroom format stores throughout. In fact, in 2017, they announced that they were to open 3 new stores 2 of which are located in Toronto, and the other in Vancouver. Additionally, they announced the future planned openings of 150 BM stores globally by 2020 (Patterson, 2017). It was also just recently announced in 2019, that Indochino is to open 20 BM stores throughout North America, one of the confirmed locations being in Toronto's TD Centre, for catering to financial occupation businessmen

(Patterson, 2019). With these reports on Indochino's future expansions and consisting of 10 BM stores with no past closures, Indochino has been marginally increasing the number of BM stores in its respective sector and quadrant.

Mark's

The results of the analysis of store per capita is seen comparatively in Table 2, and individually in Appendix B as Table 14 and Figure 16, for a summarization of 2013 to 2018 for the Mark's retailer. Mark's stores are located in all 10 provinces included in this research. The primary population market for Mark's are Ontario, Quebec, Alberta, and British Columbia this is due to the total store count of 311 in 2013 and 335 in 2018, representing over 80% of all stores for both years. These stores also provide service to nearly 90% of the total population of Canada that Mark's has access to. The secondary population markets includes all other provinces, whereby they are located primarily in population markets of less than 1 million people. Almost all of Mark's stores for each province, are close to an equal distribution in CMA's and outside of CMA's. Additionally, will there is a small negative percentage change for the number of stores in New Brunswick, all other provinces experienced either no change or under 20% increase in the number of stores. This evidence of small changes to Mark's total store counts is understandable as discussed in the methodology for the explanation for selecting each retailer chosen in this major research paper, Mark's has been focusing on introducing prototype BM stores. In addition to this point, in 2015 it was noted that Mark's continues to open 5-10 stores annually (Retail Insider, 2015), which is reflected in table 9. As such, Marks's has been marginally increasing (with the exception of store closures in 1 province) the number of BM stores in its respective sector and quadrant.

The results of the analysis of store per capita is seen comparatively with retailers in Table 2, and as a whole in Table 19 and Figure 21, for a summarization of 2013 to 2018 with the retailers encompassing the Fashion sector. The fashion retail sector consists of H&M, Indochino, and Mark's. Within figure 21, it can be seen that the fashion sector is present in all 10 provinces included in this research. The primary population market for the retail sector is Ontario, this is due to the maintained total store count 172 for 2013 and 197 for 2018 representing nearly 40% of all stores. These stores also provide service close to 42% of the total population of Canada that fashion retailers have access to. The secondary population markets include Quebec, Alberta, and British Columbia, where they service a combined 48% of the total population of Canada that fashion retailers are servicing, with close to 45% of the total stores from 2013 to 2018. The percentage change from 2013 to 2018 for total store counts had increased by 10% or greater across nearly every province. This fact is understandable as with the results from the retailers:

- H&M was a retailer with 50% and greater percentage changes.
- Indochino was a retailer marginally increasing BM store count, due to the only having 10 stores.
- Marks's was a retailer with marginal BM store count increases with 0% to 19% percentage changes.

The implications of each retailer of the fashion sector is providing; consistent marginal and substantial BM store growth, meaning that the sector is increasing BM store counts. For the fashion sector with the retailers being examined, the sector has experienced a 15.91% increase in total BM stores. This indicates that the fashion sector overall, has not been negatively affected in the retail changes across Canada. In fact, in comparison to the other retail sectors, miscellaneous ranks second in greatest percentage change.

Table 2. Fashion Retail Sector, Retailers: Retail Store Count by Province & Population Market Size, 2013 to 2018 Comparison

Fashion Retail Sector, Retailers: Retail Store Count by Province & Population Market Size, 2013 to 2018 Comparison																				
Province	Retailer	Population Markets 2013 to 2018 Comparison								Total Store Count		% Change 2013 to 2018	Stores in CMA		Stores not in CMA		% of Total Store Count		% of Total Population	
		>1,000,000		350,000 to 1,000,000		100,000 to 350,000		<100,000												
		2013	2018	2013	2018	2013	2018	2013	2018	2013	2018		2013	2018	2013	2018	2013	2018	2013	2018
Alberta	H&M	7	11	0	0	1	1	0	0	8	12	50.0%	7	11	1	1	1.8%	2.4%	4.5%	3.9%
	Indochino	0	2	0	0	0	0	0	0	0	2	200.0%	0	2	0	0	0.0%	0.4%	0.0%	6.8%
	Mark's	31	36	15	19	0	0	0	17	20	63	75	19.0%	31	36	32	39	14.3%	14.7%	3.9%
British Columbia	H&M	8	12	0	0	0	1	0	0	8	13	62.5%	8	12	0	1	1.8%	2.5%	4.5%	4.2%
	Indochino	0	2	0	0	0	0	0	0	0	2	200.0%	0	2	0	0	0.0%	0.4%	0.0%	6.2%
	Mark's	47	47	0	0	0	0	11	11	58	58	0.0%	24	24	34	34	13.2%	11.4%	4.7%	4.7%
Manitoba	H&M	0	0	0	2	0	0	0	0	0	2	200.0%	0	2	0	0	0.0%	0.4%	0.0%	1.1%
	Indochino	0	0	0	1	0	0	0	0	0	1	100.0%	0	1	0	0	0.0%	0.2%	0.0%	2.0%
	Mark's	0	0	6	7	4	4	3	3	13	14	7.7%	6	7	7	7	3.0%	2.7%	1.0%	1.0%
New Brunswick	H&M	0	0	0	0	2	3	0	0	2	3	50.0%	1	2	1	1	0.5%	0.6%	0.4%	0.5%
	Mark's	0	0	0	0	9	10	5	3	14	13	-7.1%	4	5	10	8	3.2%	2.5%	0.5%	0.5%
Newfoundland	Mark's	0	0	0	0	3	3	4	5	7	8	14.3%	3	3	4	5	1.6%	1.6%	0.3%	0.3%
Nova Scotia	H&M	0	0	1	2	0	0	0	0	1	2	100.0%	1	2	0	0	0.2%	0.4%	0.6%	0.6%
	Indochino	0	0	0	1	0	0	0	0	0	1	100.0%	0	1	0	0	0.0%	0.2%	0.0%	1.0%
	Mark's	0	0	7	7	4	4	6	6	17	17	0.0%	7	7	10	10	3.9%	3.3%	0.7%	0.7%
Ontario	H&M	28	39	0	0	0	2	1	0	29	41	41.4%	28	39	1	2	6.6%	8.0%	15.1%	14.7%
	Indochino	0	4	0	0	0	0	0	0	0	4	400.0%	0	4	0	0	0.0%	0.8%	0.0%	17.4%
	Mark's	95	100	22	26	0	0	26	26	143	152	6.3%	95	100	48	52	32.5%	29.8%	13.9%	13.9%
Prince Edward Island	H&M	0	0	0	0	0	0	0	1	0	1	100.0%	0	0	0	1	0.0%	0.2%	0.0%	0.1%
	Mark's	0	0	0	0	0	0	2	2	2	2	0.0%	0	0	2	2	0.5%	0.4%	0.1%	0.1%
Quebec	H&M	12	20	0	0	0	0	1	1	13	21	61.5%	12	20	1	1	3.0%	4.1%	8.2%	8.0%
	Mark's	30	33	13	13	0	0	4	4	47	50	6.4%	30	33	17	17	10.7%	9.8%	7.5%	7.4%
Saskatchewan	H&M	0	0	0	0	0	1	0	0	0	1	100.0%	0	1	0	0	0.0%	0.2%	0.0%	0.3%
	Mark's	0	0	6	7	6	5	3	3	15	15	0.0%	6	7	9	8	3.4%	2.9%	0.8%	0.8%
TOTALS		258	306	70	85	29	34	83	85	440	510	15.91%	263	321	177	189				

Miscellaneous Sector

Dollarama

The results of the analysis of store per capita is seen comparatively in Table 3, and individually in Appendix B as Table 8 and Figure 10, for a summarization of 2013 to 2018 for the Dollarama retailer. Dollarama's stores are located in all 10 provinces included in this research. The primary population markets for Dollarama are Ontario and Quebec, this is due to the store count of 588 for 2013 and 785 for 2018 representing a nearly 70% of all stores for both years. These Ontario and Quebec stores also

maintained service to over 70% of the population of Canada that Dollarama had access to. The secondary population markets encompass the other 8 provinces. Of which, these provinces have stores located in population areas of less than 1 million people. While the majority of stores are located in CMA's, there are still many stores located outside of CMA's for every province. The percentage change from 2013 to 2018 for total store counts, while all increasing by 25%-45%, it cannot be understated that nearly every province has over 10 Dollarama stores. Meaning these percentage changes over time are in fact significant changes. This fact is understandable as Dollarama, for the time frame of this research has consistently been increasing store counts every year. As discussed in the methodology for the explanation for selecting each retailer chosen in this major research paper, Dollarama has maintained well over 1000 BM stores throughout Canada. It was noted in Retail Insider that Dollarama planned a massive expansion in a multi-year plan with 70-80 stores added each consecutive year, most of them being in Ontario and British Columbia (Retail Insider, 2014). Therefore, with Dollarama having steadily produced BM stores throughout Canada, particularly in Ontario and Quebec, in addition to the creation of their online store and delivery, it is evident that the retailer has opened significantly more BM stores than it has closed in Canada. This can be seen in the comparison columns of Stores in CMA vs Stores not in CMA, as there are significant increases of stores in major population markets (over 1,000,000), and in smaller population markets (under 1,000,000). As the literature suggests in addition to the evidence shown in the tables, Dollarama is opening BM stores in both urban and rural areas. As such, Dollarama is a retailer that has been increasing the number of BM stores in its respective sector and quadrant.

IKEA

The results of the analysis of store per capita is seen comparatively in Table 3, and individually in Appendix B as Table 10 and Figure 12, for a summarization of 2013 to 2018 for the IKEA retailer. IKEA's stores are located in 6 of the 10 provinces included in this research. The primary population markets for IKEA are Ontario, Quebec, Alberta, and British Columbia. This is due to the maintained total store count of exactly 11 representing nearly 90% of all stores. These stores also provide service to over 42% of the total population of Canada that IKEA has access to. The secondary population markets include Manitoba and Nova Scotia, which are located in population areas of under 1 million people. All of IKEA's stores that are located within a CMA and the percentage change from 2013 to 2018 for total store counts have not changed apart from the introduction of Nova Scotia's first IKEA store. This fact is understandable as IKEA, is a foreign retailer that has a retail format that requires vast amounts of space in order to present, sell, and distribute their products. As discussed in the methodology for the explanation for selecting each retailer chosen in this major research paper, IKEA has begun representing their brand in

new ways that are not reliant on large spaces. In fact as they were utilizing pop-up stores, they were also expanding their capabilities of existing BM stores to include click-and-collect, with in-house same day deliveries from select BM locations. Additionally, in the last 6 years Ikea has been on the steady expansion and increase of building stores across Canada with their 14th BM store having been built in Quebec City (Montreal Gazette, 2018). While discussed in limitations, this 14th store was announced after the creation of the data used in this major research paper. As such, IKEA has been marginally increasing the number of BM stores in its respective sector and quadrant.

Sleep Country Canada

The results of the analysis of store per capita is seen comparatively in Table 3, and individually in Appendix B as Table 16 and Figure 18, for a summarization of 2013 to 2018 for the Sleep Country Canada retailer. Sleep Country Canada's stores are located in 9 of the 10 provinces included in this research. The primary population markets for Sleep Country Canada is Ontario, Alberta and British Columbia. This is due to the total store count of 140 stores in 2013 and 178 in 2018 representing nearly 88% of all stores for both years. These stores also provide service for close to 88% of the total population of Canada that Sleep Country Canada has access to. The secondary population markets include all other provinces, which are entirely located in population markets of under 1 million people. The majority of Sleep Country's stores are located in CMA's and Ontario has seen the greatest number of store openings in comparison to the rest of the country. The only notable closure is that of Quebec, where Sleep Country removed its presence entirely within the research time frame. However, while Quebec lost exactly 1 store, Sleep country introduced its presence into Prince Edward Island and New Brunswick with 4 stores. This fact is understandable as Sleep Country Canada, for the time frame of this research has been expanding and acquiring similar business competitors and retaining the stores of said retailers. As this is discussed in the methodology for the explanation for selecting each retailer chosen in this major research paper, Sleep Country Canada acquired Endy in 2018. As such, Sleep Country Canada is a retailer that has been increasing the number of BM stores in its respective sector and quadrant.

The results of the analysis of store per capita is seen comparatively with retailers in Table 3, and as a whole in Table 20 and Figure 22, for a summarization of 2013 to 2018 with the retailers encompassing the Miscellaneous sector. The miscellaneous retail sector consists of Dollarama, Ikea, and Sleep Country Canada. Within figure 22, it can be seen that the miscellaneous sector is present in all 10 provinces included in this research. The primary population markets for the retail sector is Ontario and Quebec, this is due to the maintained total store count of 676 for 2013 and 896 for 2018 representing nearly 68% of all stores. These stores also provide service close to 75% of the total population of Canada that

miscellaneous retailers have access to. The secondary population markets include Alberta and British Columbia, where they service a combined 19% of the total population of Canada that miscellaneous retailers are servicing, with close to 18% of the total stores from 2013 to 2018. The percentage change from 2013 to 2018 for total store counts had increased by at least 30% across nearly every province. This fact is understandable as with the results from the retailers:

- Dollarama was a retailer that had significantly and consistently increased the number of BM stores.
- IKEA was a retailer with a singular BM store count increase.
- Sleep Country Canada was a retailer with numerous BM store count increases in nearly all provinces.

The implications of each retailer of the miscellaneous sector providing BM store growth, means that the sector is either increasing BM store counts. For the miscellaneous sector with the retailers being examined, the sector has experienced a 35.82% increase in total BM stores. This indicates that the miscellaneous sector overall, has not been negatively affected in the retail changes across Canada. In fact, in comparison to the other retail sectors, miscellaneous has the greatest percentage change when compared to the other sectors.

Table 3. Miscellaneous Retail Sector, Retailers: Retail Store Count by Province & Population Market Size, 2013 to 2018
Comparison

Miscellaneous Retail Sector, Retailers: Retail Store Count by Province & Population Market Size, 2013 to 2018 Comparison																					
Province	Retailer	Population Markets 2013 to 2018 Comparison								Total Store Count		% Change 2013 to 2018	Stores in CMA		Stores not in CMA		% of Total Store Count		% of Total Population		
		>1,000,000		350,000 to 1,000,000		100,000 to 350,000		<100,000													
		2013	2018	2013	2018	2013	2018	2013	2018	2013	2018	2013	2018	2013	2018	2013	2018	2013	2018	2013	2018
Alberta	Dollarama	46	74	11	16	0	0	0	8	9	65	99	52.3%	46	74	19	25	6.6%	7.4%	2.8%	2.8%
	IKEA	2	2	0	0	0	0	0	0	0	2	2	0.0%	2	2	0	0	0.2%	0.1%	5.1%	5.0%
	Sleep Country Canada	22	26	0	0	3	5	0	0	0	25	31	24.0%	22	26	3	5	2.5%	2.3%	5.3%	5.2%
British Columbia	Dollarama	28	91	22	0	0	0	0	3	5	53	96	81.1%	28	54	25	42	5.3%	7.1%	3.4%	3.5%
	IKEA	2	2	0	0	0	0	0	0	0	2	2	0.0%	2	2	0	0	0.2%	0.1%	4.6%	4.5%
	Sleep Country Canada	27	33	8	10	0	0	0	0	0	35	43	22.9%	27	33	8	10	3.5%	3.2%	6.4%	6.3%
Manitoba	Dollarama	0	0	19	27	0	0	5	7	24	34	41.7%	19	27	5	7	2.4%	2.5%	0.7%	0.7%	
	IKEA	0	0	1	1	0	0	0	0	0	1	1	0.0%	1	1	0	0	0.1%	0.1%	1.5%	1.4%
	Sleep Country Canada	0	0	6	7	0	0	1	1	7	8	14.3%	6	7	1	1	0.7%	0.6%	1.4%	1.4%	
New Brunswick	Dollarama	0	0	0	0	18	25	9	9	27	34	25.9%	7	13	20	21	2.7%	2.5%	0.4%	0.4%	
	Sleep Country Canada	0	0	0	0	0	3	0	0	0	3	300.0%	0	2	0	1	0.0%	0.2%	0.0%	0.6%	
Newfoundland	Dollarama	0	0	0	0	5	7	9	8	14	15	7.1%	5	7	9	8	1.4%	1.1%	0.2%	0.2%	
Nova Scotia	Dollarama	0	0	11	18	8	8	8	9	27	35	29.6%	11	18	16	17	2.7%	2.6%	0.5%	0.5%	
	IKEA	0	0	0	1	0	0	0	0	0	1	100.0%	0	1	0	0	0.0%	0.1%	0.0%	0.7%	
	Sleep Country Canada	0	0	3	5	0	0	1	1	4	6	50.0%	3	5	1	1	0.4%	0.4%	0.7%	0.7%	
Ontario	Dollarama	277	431	42	0	0	0	23	31	342	462	35.1%	277	376	65	86	34.5%	34.3%	15.4%	15.4%	
	IKEA	5	5	0	0	0	0	0	0	0	5	5	0.0%	5	5	0	0	0.5%	0.4%	14.4%	14.1%
	Sleep Country Canada	79	97	0	7	0	0	0	1	0	80	104	30.0%	79	97	1	7	8.1%	7.7%	18.0%	18.1%
Prince Edward Island	Dollarama	0	0	0	0	0	0	3	5	3	5	66.7%	0	0	3	5	0.3%	0.4%	0.1%	0.1%	
	Sleep Country Canada	0	0	0	0	0	0	0	1	0	1	100.0%	0	0	0	1	0.0%	0.1%	0.0%	0.1%	
Quebec	Dollarama	168	227	35	44	0	0	43	52	246	323	31.3%	168	227	78	96	24.8%	24.0%	9.2%	9.2%	
	IKEA	2	2	0	0	0	0	0	0	0	2	2	0.0%	2	2	0	0	0.2%	0.1%	7.7%	7.5%
	Sleep Country Canada	0	0	0	0	1	0	0	0	1	0	-100.0%	1	0	0	0	0.1%	0.0%	0.6%	0.0%	
Saskatchewan	Dollarama	0	0	12	19	7	8	1	1	20	28	40.0%	12	19	8	9	2.0%	2.1%	0.6%	0.6%	
	Sleep Country Canada	0	0	6	6	0	0	0	0	0	6	6	0.0%	6	6	0	0	0.6%	0.4%	0.9%	0.9%
TOTALS		658	990	176	161	42	56	115	139	991	1346	35.82%	729	1004	262	342					

Grocery Sector

Loblaws

The results of the analysis of store per capita is seen comparatively in Table 4, and individually in Appendix B as Table 12 and Figure 14, for a summarization of 2013 to 2018 for the Loblaws retailer. Loblaws stores are located in 3 of the 10 provinces included in this research. The primary population market for Loblaws is Ontario, this is due to the maintained total store count of 41 stores in 2013 and 45 stores in 2018 representing nearly 57.7% of all stores in 2013, and 100% in 2018. These stores also provided service to exactly 49% of the total population of Canada that Loblaws had access to, which drastically changed to 100% in 2018. The former secondary population markets included Quebec and British Columbia, where they serviced a combined 51% of the total population of Canada, with 42% of the total stores in 2013. All of Loblaws' stores that were located outside of Ontario closed between 2013 and 2018. This indicates significant loss of BM stores and brand presence elsewhere in Canada. Furthermore, these massive closures for Loblaws were not openly reported or investigated. Loblaws has only been reported to have been integrating smoother customer interactions within their BM stores, and

linking compatible online services to their BM stores. As such, Loblaws has been closing a considerable number of BM stores in its respective sector and quadrant.

Longo's

The results of the analysis of store per capita is seen comparatively in Table 4, and individually in Appendix B as Table 13 and Figure 15, for a summarization of 2013 to 2018 for the Longo's retailer. Longo's stores are located exclusively in Ontario. Therefore, this is only market Longo's services with 25 stores in 2013 and 27 in 2018. All of Longo's stores are within CMA's. This fact is understandable as Longo's, has always maintained their business inside of Ontario. As discussed in the methodology for the explanation for selecting each retailer chosen in this major research paper, while Longo's has maintained a small number of BM stores, they were among the first grocery retailers to incorporate online capabilities into a multi-channel business strategy. As such, Longo's has been marginally increasing the number of BM stores in its respective sector and quadrant.

Metro

The results of the analysis of store per capita is seen comparatively in Table 4, and individually in Appendix B as Table 15 and Figure 17, for a summarization of 2013 to 2018 for the Metro retailer. Metro's stores are located in 2 of the 10 provinces included in this research. Metro's stores are located exclusively in Ontario and Quebec. These 2 provinces that Metro services consist of 355 stores in 2013 and 219 in 2018. In 2013 Quebec held the majority of BM stores, however between 2013 and 2018, the majority changed to Ontario. Despite this drastic change, the consistent pattern for Metro's BM stores is the maintained their presence in populations of under 100,000 and above 1,000,000 throughout the research timeline. However, it is evident that Metro has experienced major closures of BM stores in Ontario and Quebec, with 114 in Quebec alone. Through the research of Metro, reports and announcements of this large of a scale of BM closures was not discovered. In fact, it was only in 2013, that Metro announced it was to close 15 Ontario locations and to turn focus to Metro pharmacies in Quebec (Metro, 2013). This information was the only indication that Metro was closing BM stores, as discussed in the methodology, Metro has been reported to be expanding its online services capabilities to supplement its BM locations. Following this in mid-2018, Metro acquisitioned the drug store chain Jean Coutu Group, further extending its market and increasing its BM locations (The Canadian Press, 2019). With the use of in-house click-and-collect services, Metro incorporated Uber Eats in early 2019 as a

Montreal pilot project for delivery of prepared meals across twenty-four BM stores (Redman, 2019). As such, Metro has been closing a considerable number of BM stores in its respective sector and quadrant.

The results of the analysis of store per capita is seen comparatively with retailers in Table 4, and as a whole in Table 22 and Figure 23, for a summarization of 2013 to 2018 with the retailers encompassing the Grocery sector. The grocery retail sector consists of Loblaw's, Longo's, and Metro. Within figure 23, it can be seen that the grocery sector is present only 2 of the 10 provinces included in this research. Therefore, the primary population markets for the retail sector is Ontario and Quebec. The percentage change from 2013 to 2018 for total store counts experienced major retail closures. This fact is understandable as with the results from the retailers:

- Loblaw's was a retailer with major closures of BM stores.
- Longo's was a retailer with marginal BM store count increases.
- Metro was a retailer with major closures of BM stores.

The implications of each retailer of the grocery sector providing BM store closures, means that the sector is either decreasing BM store counts. For the grocery sector with the retailers being examined, the sector has experienced a nearly -35.48% decrease in total BM stores. This indicates that the grocery sector overall, has most certainly been negatively affected by the retail changes across Canada. In fact, this sector and its accompanying retails have sustained the greatest percentage change loss in comparison to the other sectors. This indicates that the retail of grocery is currently in a state of transition, changing their retailing strategies to better accommodate their customers.

Table 4. Grocery Retail Sector, Retailers: Retail Store Count by Province & Population Market Size, 2013 to 2018 Comparison

Grocery Retail Sector, Retailers: Retail Store Count by Province & Population Market Size, 2013 to 2018 Comparison																				
Province	Retailer	Population Markets 2013 to 2018 Comparison								Total Store Count		% Change 2013 to 2018	Stores in CMA		Stores not in CMA		% of Total Store Count		% of Total Population	
		>1,000,000		350,000 to 1,000,000		100,000 to 350,000		<100,000												
		2013	2018	2013	2018	2013	2018	2013	2018	2013	2018		2013	2018	2013	2018	2013	2018	2013	2018
British Columbia	Loblaws	1	0	0	0	0	0	0	0	1	0	-100.0%	1	0	0	0	0.2%	0.0%	5.0%	0.0%
Ontario	Loblaws	39	43	0	0	0	0	2	2	41	45	9.8%	39	43	2	2	9.1%	15.5%	16.3%	33.3%
	Longo's	25	27	0	0	0	0	0	0	25	27	8.0%	25	27	0	0	5.5%	9.3%	33.3%	33.3%
	Metro	117	107	17	16	0	0	11	10	145	133	-8.3%	117	107	28	26	32.2%	45.7%	21.4%	21.6%
Quebec	Loblaws	21	0	7	0	0	0	1	0	29	0	-100.0%	21	0	8	0	6.4%	0.0%	12.0%	0.0%
	Metro	130	38	21	0	0	8	59	40	210	86	-59.0%	130	38	80	48	46.6%	29.6%	11.9%	11.7%
TOTALS		333	215	45	16	0	8	73	52	451	291	-35.48%	333	215	118	76				

Quadrants

Artisan

The results of the analysis of store per capita is seen comparatively with retailers in Table 5, and as a whole in Table 22 and Figure 24, for a summarization of 2013 to 2018 with the retailers encompassing the Artisan quadrant. The artisan quadrant consists of Loblaw's and Longo's. Within figure 24, it can be seen that the artisan quadrant is present in 1 of the 10 provinces included in this research. The only population market for the quadrant is Ontario, this is due to the maintained total store count of 64 in 2013 and 70 in 2018 representing eventually 100% of all stores. The percentage change from 2013 to 2018 for total store counts had increased only in Ontario, with the artisan retailers closing completely in British Columbia and Quebec. This fact is understandable as with the results from the retailers:

- Loblaw's was a retailer with major closures of BM stores.
- Longo's was a retailer with marginal BM store count increases.

Elite

The results of the analysis of store per capita is seen comparatively with retailers in Table 5, and as a whole in Table 23 and Figure 25, for a summarization of 2013 to 2018 with the retailers encompassing the Elite quadrant. The elite quadrant consists of the Apple Store, Best Buy, and IKEA. Within figure 25, it can be seen that the elite quadrant is present in all 10 provinces included in this research. The primary population market for the quadrant is Ontario, this is due to the maintained total store count 49 in 2013 and 69 in 2018 representing over 40% of all stores. These stores also provide service close to 43% of the total population of Canada that artisan retailers have access to. The secondary population markets include Quebec, Alberta, and British Columbia, where they service a combined 47% of the total population of Canada that artisan retailers are servicing, with close to 47% of the total stores from 2013 to 2018. The percentage change from 2013 to 2018 for total store counts had increased across nearly every province. This fact is understandable as with the results from the retailers:

- The Apple Store was a retailer with 0% percentage change.
- Best Buy was a retailer with 70% and greater percentage changes.
- IKEA was a retailer with a singular BM store count increase

Mundane

The results of the analysis of store per capita is seen comparatively with retailers in Table 5, and as a whole in Table 24 and Figure 26, for a summarization of 2013 to 2018 with the retailers encompassing the Mundane quadrant. The mundane quadrant consists of Dollarama, H&M, Metro, and Staples. Within figure 26, it can be seen that the mundane quadrant is present in all 10 provinces included in this research. The primary population markets for the quadrant is Ontario, Quebec, Alberta and British Columbia. This is due to the total store count of 1398 stores in 2013 and 1551 in 2018 representing nearly 90% of all stores the research time frame. These stores also provide service close to 94% of the total population of Canada that mundane retailers have access to. The secondary population markets include all other provinces, where they service the remaining 10% of Canada that mundane retailers are servicing, in population areas of less than 1 million people. The percentage change from 2013 to 2018 for total store counts had increased across nearly every province, except for Quebec with 46 closed stores. This fact is understandable as with the results from the retailers:

- Dollarama was a retailer that had significantly and consistently increased the number of BM stores.
- H&M was a retailer with 50% and greater percentage changes.
- Metro was a retailer with major closures of BM stores.
- Staples was a retailer with numerous store closures and negative percentage changes for the majority of provinces their BM stores were located in.

Unique

The results of the analysis of store per capita is seen comparatively with retailers in Table 5, and as a whole in Table 25 and Figure 27, for a summarization of 2013 to 2018 with the retailers encompassing the Unique quadrant. The unique quadrant consists of Indochino, Mark's, and Sleep Country Canada. Within figure 27, it can be seen that the unique quadrant is present in all 10 provinces included in this research. The only population market for the quadrant is Ontario, this is due to the total store count of 223 in 2013 and 260 in 2018, representing over 40% of all stores. These stores also provide service close to 42% of the total population of Canada that unique retailers have access to. The secondary population markets include Quebec, Alberta, and British Columbia, where they service a combined 48% of the total population of Canada that unique retailers are servicing, with close to 47% of the total stores from 2013 to 2018. The percentage change from 2013 to 2018 for total store counts had increased across nearly every province. This fact is understandable as with the results from the retailers:

- Indochino was a retailer marginally increasing BM store count, due to the only having 10 stores.
- Marks's was a retailer with marginal BM store count increases with 0% to 19% percentage changes.
- Sleep Country Canada was a retailer with numerous BM store count increases in nearly all provinces.

Table 5. Quadrants: Retail Store Count by Province & Population Market Size, 2013 to 2018 Comparison

Quadrants: Retail Store Count by Province & Population Market Size, 2013 to 2018 Comparison																				
Province	Retailer	Population Markets 2013 to 2018 Comparison								Total Store Count		% Change 2013 to 2018	Stores in CMA		Stores not in CMA		% of Total Store Count		% of Total Population	
		>1,000,000		350,000 to 1,000,000		100,000 to 350,000		<100,000												
		2013	2018	2013	2018	2013	2018	2013	2018	2013	2018		2013	2018	2013	2018	2013	2018	2013	2018
Alberta	Elite	15	21	0	0	2	4	0	0	17	25	47.1%	15	21	2	4	0.7%	1.0%	3.2%	2.9%
	Mundane	79	112	20	25	0	0	12	13	111	150	35.1%	79	112	32	38	4.8%	5.8%	1.7%	1.7%
	Unique	53	64	18	24	0	0	17	20	88	108	22.7%	53	64	35	44	3.8%	4.1%	2.9%	2.9%
British Columbia	Artisan	1	0	0	0	0	0	0	0	1	0	-100.0%	1	0	0	0	0.0%	0.0%	3.6%	0.0%
	Elite	15	22	0	8	1	0	0	0	16	30	87.5%	15	22	1	8	0.7%	1.2%	3.0%	3.5%
	Mundane	101	146	0	0	0	0	3	5	104	151	45.2%	59	88	45	63	4.5%	5.8%	2.1%	2.1%
Manitoba	Unique	82	92	0	0	0	0	11	11	93	103	10.8%	51	59	42	44	4.0%	3.9%	3.6%	3.6%
	Elite	0	0	4	5	0	0	0	1	4	6	50.0%	4	5	0	1	0.2%	0.2%	0.8%	0.8%
	Mundane	0	0	25	34	0	0	9	11	34	45	32.4%	25	34	9	11	1.5%	1.7%	0.4%	0.4%
New Brunswick	Unique	0	0	12	15	5	5	3	3	20	23	15.0%	12	15	8	8	0.9%	0.9%	0.8%	0.8%
	Elite	0	0	0	0	0	3	0	0	0	3	300.0%	0	2	0	1	0.0%	0.1%	0.0%	0.3%
	Mundane	0	0	0	0	29	35	10	9	39	44	12.8%	13	18	26	26	1.7%	1.7%	0.2%	0.2%
Newfoundland	Unique	0	0	0	0	9	13	5	3	14	16	14.3%	4	7	10	9	0.6%	0.6%	0.4%	0.4%
	Elite	0	0	0	0	1	1	0	0	1	1	0.0%	1	1	0	0	0.0%	0.0%	0.2%	0.2%
	Mundane	0	0	0	0	8	10	10	9	18	19	5.6%	8	10	10	9	0.8%	0.7%	0.1%	0.1%
Nova Scotia	Unique	0	0	0	0	3	3	4	5	7	8	14.3%	3	3	4	5	0.3%	0.3%	0.2%	0.2%
	Elite	0	0	3	4	0	0	0	1	3	5	66.7%	3	4	0	1	0.1%	0.2%	0.4%	0.5%
	Mundane	0	0	18	26	12	12	11	12	41	50	22.0%	18	26	23	24	1.8%	1.9%	0.3%	0.3%
Ontario	Unique	0	0	10	13	5	5	6	6	21	24	14.3%	10	13	11	11	0.9%	0.9%	0.5%	0.5%
	Artisan	64	70	0	0	0	0	2	2	66	72	9.1%	64	70	2	2	2.9%	2.8%	12.8%	25.0%
	Elite	49	62	0	7	0	0	0	0	49	69	40.8%	49	62	0	7	2.1%	2.6%	11.1%	10.6%
Prince Edward Island	Mundane	522	701	80	0	0	0	41	45	643	746	16.0%	522	608	121	138	27.8%	28.6%	12.2%	12.2%
	Unique	174	201	23	33	0	0	26	26	223	260	16.6%	174	201	49	59	9.7%	10.0%	10.4%	10.5%
	Elite	0	0	0	0	0	0	0	1	0	1	100.0%	0	0	0	1	0.0%	0.0%	0.0%	0.1%
Quebec	Mundane	0	0	0	0	0	0	5	8	5	8	60.0%	0	0	5	8	0.2%	0.3%	0.0%	0.0%
	Unique	0	0	0	0	0	0	2	3	2	3	50.0%	0	0	2	3	0.1%	0.1%	0.1%	0.1%
	Artisan	21	0	7	0	0	0	1	0	29	0	-100.0%	21	0	8	0	1.3%	0.0%	8.6%	0.0%
Saskatchewan	Elite	18	26	0	0	0	3	0	1	18	30	66.7%	18	26	0	4	0.8%	1.2%	5.6%	5.6%
	Mundane	365	333	71	67	0	0	104	94	540	494	-8.5%	365	333	175	161	23.4%	18.9%	7.6%	7.6%
	Unique	31	33	13	13	0	0	4	4	48	50	4.2%	31	33	17	17	2.1%	1.9%	5.6%	5.5%
TOTALS	Elite	0	0	2	3	0	0	0	1	2	4	100.0%	2	3	0	1	0.1%	0.2%	0.6%	0.5%
	Mundane	0	0	17	25	13	13	1	1	31	39	25.8%	17	25	14	14	1.3%	1.5%	0.3%	0.3%
	Unique	0	0	12	13	6	5	3	3	21	21	0.0%	12	13	9	8	0.9%	0.8%	0.6%	0.6%

Chapter 5: Conclusion and Limitations

Conclusion

The analysis in this major research paper has provided a glimpse into Canadian retail. Several retailers that have experienced varying degrees of loss in BM presence. The retailers that experienced noticeable BM closures were: Staples, Loblaws, Metro, and Mark's, with closures primarily in Quebec and New Brunswick, with Ontario and British Columbia having smaller but notable closures as well. The population markets in which these closures occurred, were in high population areas of over 1 million people and in areas with populations of 100,000 people and less. The population markets that consisted of populations between 100,000 to 1 million, experienced very infrequent BM closures both amongst the retailers with closures and the other 8 retailers that showed BM store growth. As the retailers were organized into quadrants and retail sectors, it was noticeable that the quadrants experience greater BM store loss or very little percentage change over time when compared to the retail sectors. In particular, the Artisan quadrant experienced the greatest BM store loss, which was contrary to Binnie's research where Elite and Unique were the most likely to fail to omni channel retailers. It should be noted however, while Elite did not close BM stores, it held a limited BM presence throughout Canada in comparison to the other quadrants. The notable differences in Binnie's research and findings, is likely attributed to the individual retailers within the quadrants themselves. Artisan held the fewest retailers (2) and Loblaws experienced major BM closures, while Longo's was essentially stagnant in terms of BM closures and openings.

With the influx of omni channel usage and its influence on many retailers to seemingly cause retail to change and retailers to close locations, the demand for space in Canada has most certainly experienced change. This change, however, is not a negative occurrence. BM stores are no longer exclusively for the sale and presentation of products. Stores typically used for sale have been exchanged in part for purposes that physically represent their brand and the products they sell with interactive technology that captures current and new customers. Whether the interaction is purely digital as a notification of sale items, or a kiosk that showcases new technological products, retail space has changed. This can further explain the spatial aspect of the demand for space in Canada. The reason for closure of BM stores in highly populated areas (urban) and in sparsely populated areas (rural) is that the online aspect of retail bridges the gap between customer and BM store, revealing less of a need for BM stores in these areas. In urban areas, a singular large grocery store could service a large population that physically visit it. With online services, such as click-and-collect and food/grocery/product delivery services, the area and population that that store can service, will expand. The same can be said in rural areas, as long as

the retailer has the infrastructure to accommodate for delivery services and their online services are compatible with BM stores. The populations that are in between the urban and rural, known as suburban/ex-urban still utilize the same services, however, the majority of these people in suburban settings are commuters. As commuters (through private vehicle or public transit) they have already incorporated travel to and from most retailers at the start or end of their day of work. This is a possible explanation why there is little to no BM closures in populations between 100,000 and 1 million people.

Limitations

There were several minor discrepancies in the data for the CSCA. The first discrepancy in the data is that from 2013 to 2017, there are 11 of the 12 retailers that encompass the data. It is in 2018 where all 12 retailers are included, this is due to the fact that Indochino only appeared in the data for the 2018 timeframe with physical stores. The reason this is a discrepancy is that, although Indochino only consists of a total of 10 BM stores within Canada during the research time frame, Indochino located its first BM in 2014 followed by the other 9 throughout the research time frame. This means that the fashion sector and unique quadrant, of which Indochino is attached to, will have missing information from the retailer. The second discrepancy in the data involves the date at which the information all retailer locations were gathered and submitted. With these data varying on the retailer, these dates are understandably done before the end of a calendar year, the majority of data submissions happening in September or October. With this being noted, there are some retailers that have opened and/or closed locations after the date in which the information provided by the CSCA was made. Therefore, there are some discrepancies on the final store counts for some retailers in the analysis.

It is important to note that all of the results in this major research paper do not account for any of the retailers changing their chain format through rebranding or closure/opening of franchise stores. Any and all BM store changes over time for the retailers are understood to be corporate actions of each respective retailer as a whole. Additionally, while the store per capita analysis was utilized in this major research paper, there were several other spatial analysis techniques that could be utilized in the future for similar. While these would have been supplementary to the results; Kernel Density, Spatial Autocorrelation, and Point Pattern Analysis would have provided further depth into the spatial aspect of the results for this major research paper.

Appendix A: Alteryx Workflows Overview

Workflow Section 1

As a full and comprehensive explanation of how the workflows were constructed is required, the following figures are simple breakdowns of Figure 3. It is important to note that the data originally received from the CSCA was supplemented with additional information from another CSCA data request and information on Population centre population counts from Statistics Canada. The additional CSCA data request was for clarification of the Store Format code designations. This was for understanding the proper definitions of all possible store formats and for the subsequent organization of said formats into 4 different general overarching formats for categorization. This can be seen properly in the Formula Tool (1) explanation. For clarification on what to look at in the workflow sections, each line in figure 2 are the exact same apart from the input data year they are processing. I.e. the top line is 2013, and following chronologically downwards the last line is the 2018 data year. Additionally, in figures 5 through 8 each tool explained follows in order from left to right for the respective image of the section.

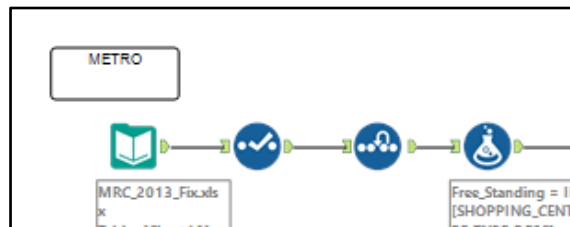


Figure 5. Main Body
(Section 1 of 4)

1. Input Data Tool:
 - a. Datasets from the CSCA of the retailers combined with the aforementioned supplementary information, each input tool is a respective year, starting from 2013 and ending on 2018.
2. Select Tool (1):
 - a. Selection of all pertinent data from the respective input data year.
3. Imputation Tool:
 - a. Changes null values to values of zero. Used for CMA and CA population centres, as some retail locations are not located in all three population market options (CMA, CA, and CSD).
4. Formula Tool (1):
 - a. First Formula tool that processes string fields into new integer fields of binary 1 or 0. Which is essentially the counts of the indicators.

- i. Free Standing
 - 1. ***IF [SHOPPING_CENTRE_TYPE_DESC] = "Free Standing" THEN
"1" ELSE "" ENDIF***
- ii. Power Centres
 - 1. ***IF [SHOPPING_CENTRE_TYPE_DESC] = "Power Centre" THEN
"1" ELSE "" ENDIF***
- iii. Regional Malls
 - 1. ***IF [SHOPPING_CENTRE_TYPE_DESC] = "Regional"
OR
[SHOPPING_CENTRE_TYPE_DESC] = "Super Regional"
THEN "1" ELSE "" ENDIF***
- iv. Neighbourhood Malls
 - 1. ***IF [SHOPPING_CENTRE_TYPE_DESC] = "Neighbourhood"
OR [SHOPPING_CENTRE_TYPE_DESC] = "Community"
OR [SHOPPING_CENTRE_TYPE_DESC] = "Mixed-use"
OR [SHOPPING_CENTRE_TYPE_DESC] = "Convenience"
OR [SHOPPING_CENTRE_TYPE_DESC] = "Factory Outlet"
OR [SHOPPING_CENTRE_TYPE_DESC] = "Hybrid"
OR [SHOPPING_CENTRE_TYPE_DESC] = "Lifestyle Centre"
THEN "1" ELSE "" ENDIF***
- v. CMA Pop Centres
 - 1. ***IF [CMA_YES] = "YES" THEN "1" ELSE "" ENDIF***
- vi. CA Pop Centres
 - 1. ***IF [CA_YES] = "YES" THEN "1" ELSE "" ENDIF***
- vii. CSD Pop Centres
 - 1. ***IF [CSD_YES] = "YES" THEN "1" ELSE "" ENDIF***

Workflow Section 2

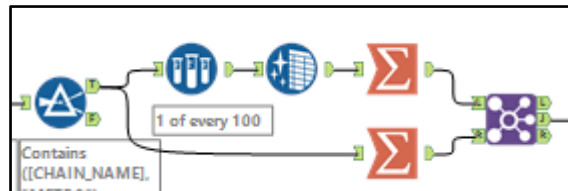


Figure 6. Main Body
(Section 2 of 4)

1. Contains Tool:
 - a. The retailer selection tool that filters for the retailer required for the specific workflow. For the individual retailer workflow, each of the following statement would be for a singular retailer. Whereby, the Quadrant and Retail Sector workflows would select multiple retailers with the statement below: (Artisan selection for Quadrant Workflow)
 - i. *Contains ([CHAIN_NAME], "LONGO'S")*
OR
Contains ([CHAIN_NAME], "LOBLAWS")
2. Sample Tool:
 - a. During the creation of the workflow and summarizing (counting the populations of CMA's and CA's) there were many instances of double counting populations. This was due to the fact that the tables are organized by Provinces, therefore several CMAs and CA's would be double counted and provide incorrect numerical population values. This tool essentially selects 1 of each CMA and CA that is associated with the retailer selection in the associated province.
 - i. Selection was of the CMA and CA populations
3. Data Cleansing Tool (1):
 - a. Essentially cleans the output of the Sample Tool, with replacing any nulls with zeros.
4. Summarization Tool (1) (top):
 - a. Selects the population data that was processed and groups them by province.
5. Summarization Tool (2) (bottom):
 - a. This is the summarization tool for the other indicators. Being grouped by province.
6. Join Tool:
 - a. The reason the workflow temporarily splits is due to the aforementioned issues with the population values being double counted, therefore requiring that issue to be addressed directly with other tools and then being re integrated with the other indicators with this Join Tool.

Workflow Section 3

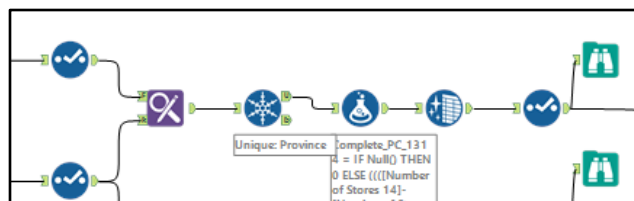


Figure 7. Main Body (Section 3 of 4)

1. Select Tool (2):
 - a. Final selection of indicator Counts before combination with the following year of data. If required, this would be the full data range (for counts) for each individual year. There are 2 select tools, the top tool is the older year (i.e. 2013) and the bottom tool is the younger year (i.e. 2014).
2. Append Tool:
 - a. The beginning of the percentage change section of the workflow, the append tool essentially joins 2 separate years together based off of their provinces. Based off of the nature of the data, between years locations could expand to provinces that were not included in the previous year. This is why for some of the Append arrows are switched, so as to account for this. The placement does not affect the output of the data (tools further on correct for this) it just means that nulls will appear for some provinces (as no store existed there for either the previous year or the following year).
3. Unique Tool:
 - a. Simple tool that was optional, but its purpose is to select unique instances or all instances of provinces (all provinces included in the 2 now connected years). The reason for this is because all data is being organized by the province.
4. Formula Tool (2):
 - a. This is the second formula tool in the workflow, it contains all of the formulas that calculate the percentage change across all indicators between the 2 consecutive years.
 - i. All formulas are the same, the only thing that changes are the years of the data, i.e. 2013-2014, 2014-2015, 2015-2016, etc. All follow the following format:
 1. ***IF Null() THEN 0 ELSE ((([Indicator Count YOUNGEST Year]-[Indicator Count OLDEST Year])/[Indicator Count OLDEST Year])*100) ENDIF***
 2. The indicators being:
 - a. Total store counts Percentage Changes
 - b. Store Format Percentage Changes
 - i. Free Standing
 - ii. Power Centre
 - iii. Regional malls
 - iv. Neighbourhood Malls
 - c. Population Markets Percentage Changes
 - i. CMA centres

- ii. CMA population
 - iii. CA centres
 - iv. CA population
 - v. CSD centres
- 5. Data Cleansing Tool (2):
 - a. Simple data cleansing tool converting nulls to zeros.
- 6. Selection Tool 3 and Browse Tool:
 - a. Selection of complete counts and percentage changes of the indicators. The browse tool was optional as a quick means of visualizing the data at this stage of the workflow.

Workflow Section 4

- 1. Summarize Tool (3):
 - a. Simple organization of data following the format of Grouping by the provinces and summing of all indicators (counts and percentage changes).
- 2. Join Multiple Tool:
 - a. Complete join of the data for each year and consecutive years combined for calculation of percentage change, into a single table.
- 3. Formula Tool (3):
 - a. The final formula tool, which is just used to create a new field for organizational purposes. There are 3 different versions for this formula:
 - i. **Quadrant = (respective quadrant the data is associated with)**
 - ii. **Retail Sector = (respective retail sector the data is associated with)**
 - iii. **Retailer = (respective retailer the data is associated with)**
- 4. Summarize Tool (4):
 - a. Simple organization of all pertinent data for the workflow following the format of Grouping by the Quadrant, Retailer, or Retail Sector (depending on the workflow) and provinces, with the summing of all indicators (counts and percentage changes).
- 5. Select Tool (4):
 - a. Simple organization of the full data into indicator groups that are chronologically listed by the year of the data.

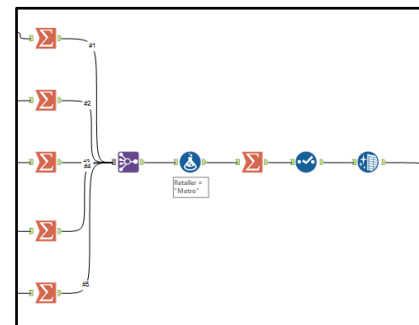


Figure 8. Main Body (Section 4 of 4)

Appendix B: Results Tables and Figures

Individual Retailers

The Apple Store

Table 6. The Apple Store: Retailer Store Count by Province & Population Market Size, 2013 to 2018 Comparison

The Apple Store: Retailer Store Count by Province & Population Market Size, 2013 to 2018 Comparison																			
Province	Population Markets 2013 to 2018 Comparison								Total Store Count		% Change 2013 to	Stores in CMA		Stores not in CMA		% of Total Store Count		% of Total Population	
	>1,000,000		350,000 to 1,000,000		100,000 to 350,000		<100,000												
	2013	2018	2013	2018	2013	2018	2013	2018	2013	2018	2018	2013	2018	2013	2018	2013	2018	2013	2018
Alberta	4	4	0	0	0	0	0	0	4.0	4.0	0%	4	4	0	0	14.3%	14.3%	14.0%	14.0%
British Columbia	6	6	0	0	0	0	0	0	6.0	6.0	0%	6	6	0	0	21.4%	21.4%	12.7%	12.7%
Manitoba	0	0	1	1	0	0	0	0	1.0	1.0	0%	1	1	0	0	3.6%	3.6%	4.0%	4.0%
Nova Scotia	0	0	1	1	0	0	0	0	1.0	1.0	0%	1	1	0	0	3.6%	3.6%	2.1%	2.1%
Ontario	11	11	0	0	0	0	0	0	11.0	11.0	0%	11	11	0	0	39.3%	39.3%	42.0%	42.0%
Quebec	5	5	0	0	0	0	0	0	5.0	5.0	0%	5	5	0	0	17.9%	17.9%	25.2%	25.2%
TOTALS	26	26	2	2	0	0	0	0	28.0	28.0	0%	28	28	0	0				

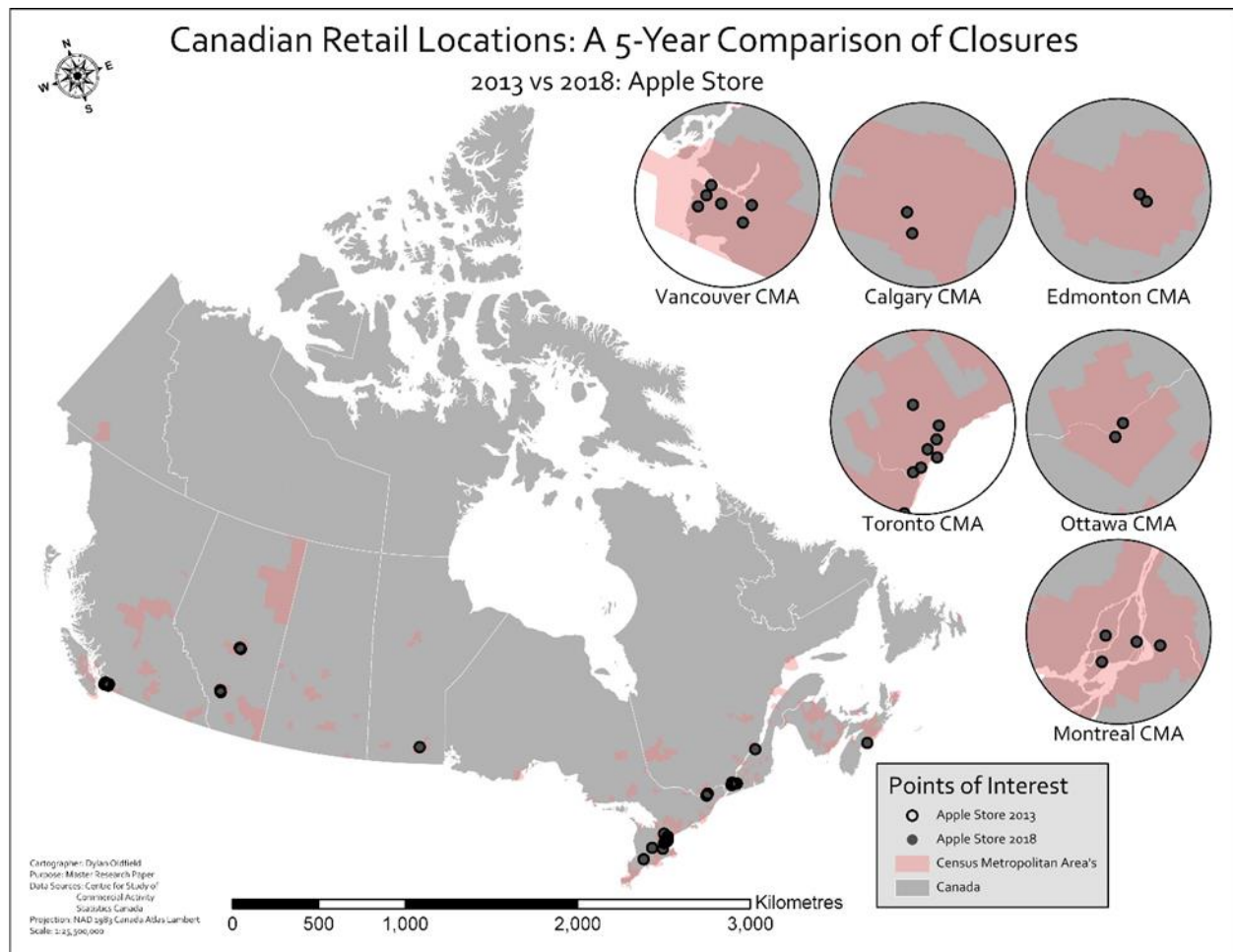


Figure 9. Map of Apple Store's BM Stores of 2013 to 2018

Best Buy

Table 7. Best Buy: Retailer Store Count by Province & Population Market Size, 2013 to 2018 Comparison

Best Buy: Retailer Store Count by Province & Population Market Size, 2013 to 2018 Comparison																			
Province	Population Markets 2013 to 2018 Comparison								Total Store Count		% Change 2013 to	Stores in CMA		Stores not in CMA		% of Total Store Count		% of Total Population	
	>1,000,000		350,000 to 1,000,000		100,000 to 350,000		<100,000												
	2013	2018	2013	2018	2013	2018	2013	2018	2013	2018		2018	2013	2018	2013	2018	2013	2018	2013
Alberta	9	15	0	0	2	4	0	0	11	19	72.7%	9	15	2	4	15.7%	14.3%	12.8%	11.5%
British Columbia	7	14	0	8	1	0	0	0	8	22	175.0%	7	14	1	8	11.4%	16.5%	12.1%	14.0%
Manitoba	0	0	2	3	0	0	0	1	2	4	100.0%	2	3	0	1	2.9%	3.0%	3.3%	3.1%
New Brunswick	0	0	0	0	0	3	0	0	0	3	300.0%	0	2	0	1	0.0%	2.3%	0.0%	1.4%
Newfoundland	0	0	0	0	1	1	0	0	1	1	100.0%	1	1	0	0	1.4%	0.8%	0.9%	0.8%
Nova Scotia	0	0	2	2	0	0	0	1	2	3	50.0%	2	2	0	1	2.9%	2.3%	1.7%	1.9%
Ontario	33	46	0	7	0	0	0	0	33	53	60.6%	33	46	0	7	47.1%	39.8%	44.5%	42.6%
Prince Edward Island	0	0	0	0	0	0	0	1	0	1	100.0%	0	0	0	1	0.0%	0.8%	0.0%	0.3%
Quebec	11	19	0	0	0	3	0	1	11	23	109.1%	11	19	0	4	15.7%	17.3%	22.3%	22.3%
Saskatchewan	0	0	2	3	0	0	0	1	2	4	100.0%	2	3	0	1	2.9%	3.0%	2.3%	2.1%
TOTALS	60	94	6	23	4	11	0	5	70	133	90%	67	105	3	28				

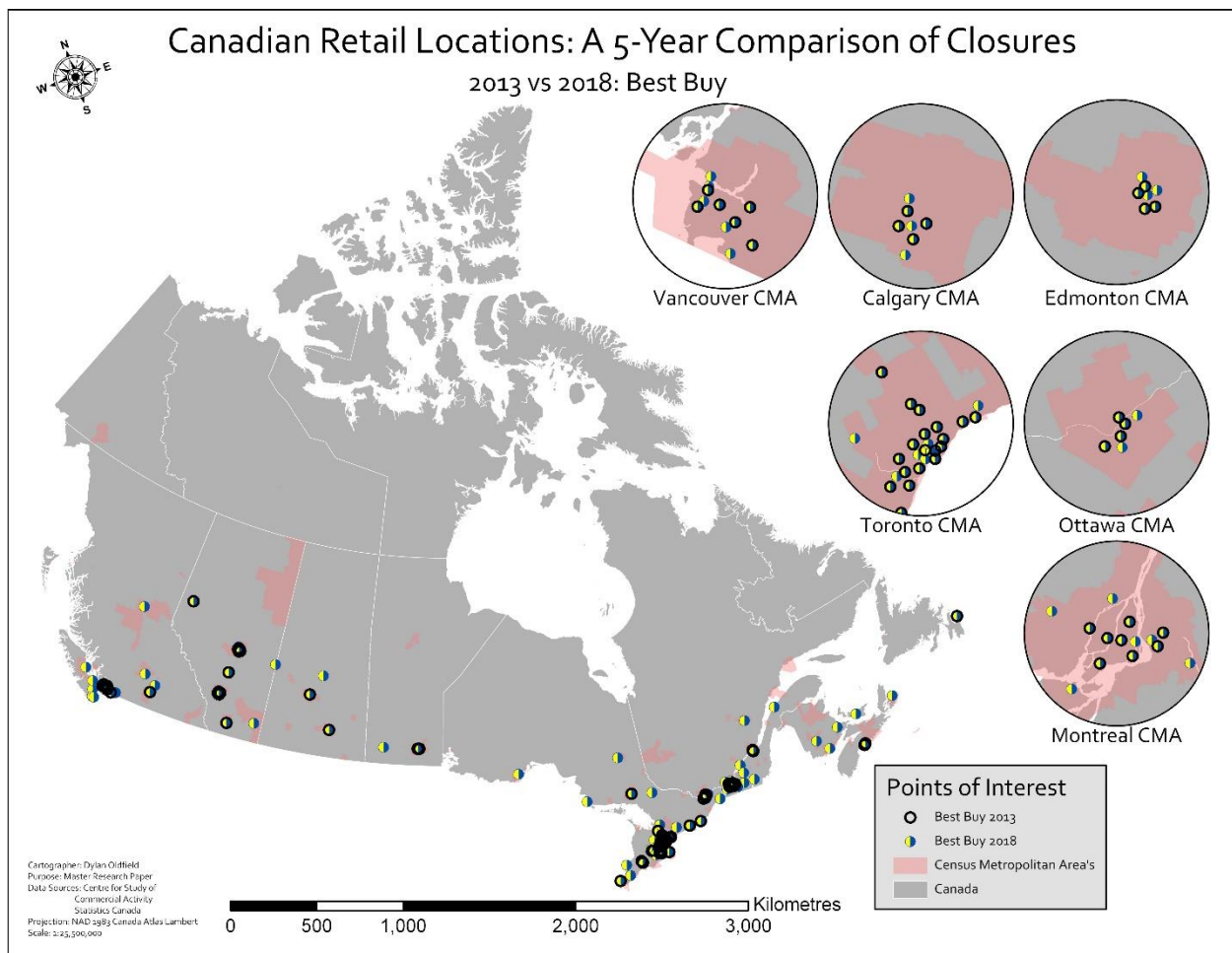


Figure 10. Map of Best Buy's BM Stores of 2013 to 2018

Dollarama

Table 8. Dollarama: Retailer Store Count by Province & Population Market Size, 2013 to 2018 Comparison

Dollarama: Retailer Store Count by Province & Population Market Size, 2013 to 2018 Comparison																			
Province	Population Markets 2013 to 2018 Comparison								Total Store Count		% Change 2013 to	Stores in CMA		Stores not in CMA		% of Total Store Count		% of Total Population	
	>1,000,000		350,000 to 1,000,000		100,000 to 350,000		<100,000												
	2013	2018	2013	2018	2013	2018	2013	2018	2013	2018	2018	2013	2018	2013	2018	2013	2018	2013	2018
Alberta	46	74	11	16	0	0	8	9	65	99	52.3%	46	74	19	25	7.9%	8.8%	8.3%	8.3%
British Columbia	28	91	22	0	0	0	3	5	53	96	81.1%	28	54	25	42	6.5%	8.5%	10.2%	10.5%
Manitoba	0	0	19	27	0	0	5	7	24	34	41.7%	19	27	5	7	2.9%	3.0%	2.2%	2.2%
New Brunswick	0	0	0	0	18	25	9	9	27	34	25.9%	7	13	20	21	3.3%	3.0%	1.2%	1.2%
Newfoundland	0	0	0	0	5	7	9	8	14	15	7.1%	5	7	9	8	1.7%	1.3%	0.7%	0.7%
Nova Scotia	0	0	11	18	8	8	8	9	27	35	29.6%	11	18	16	17	3.3%	3.1%	1.6%	1.6%
Ontario	277	431	42	0	0	0	23	31	342	462	35.1%	277	376	65	86	41.7%	40.8%	46.2%	46.1%
Prince Edward Island	0	0	0	0	0	0	3	5	3	5	66.7%	0	0	3	5	0.4%	0.4%	0.2%	0.2%
Quebec	168	227	35	44	0	0	43	52	246	323	31.3%	168	227	78	96	30.0%	28.6%	27.7%	27.6%
Saskatchewan	0	0	12	19	7	8	1	1	20	28	40.0%	12	19	8	9	2.4%	2.5%	1.7%	1.7%
TOTALS	519	823	152	124	38	48	112	136	821	1131	38%	573	815	248	316				

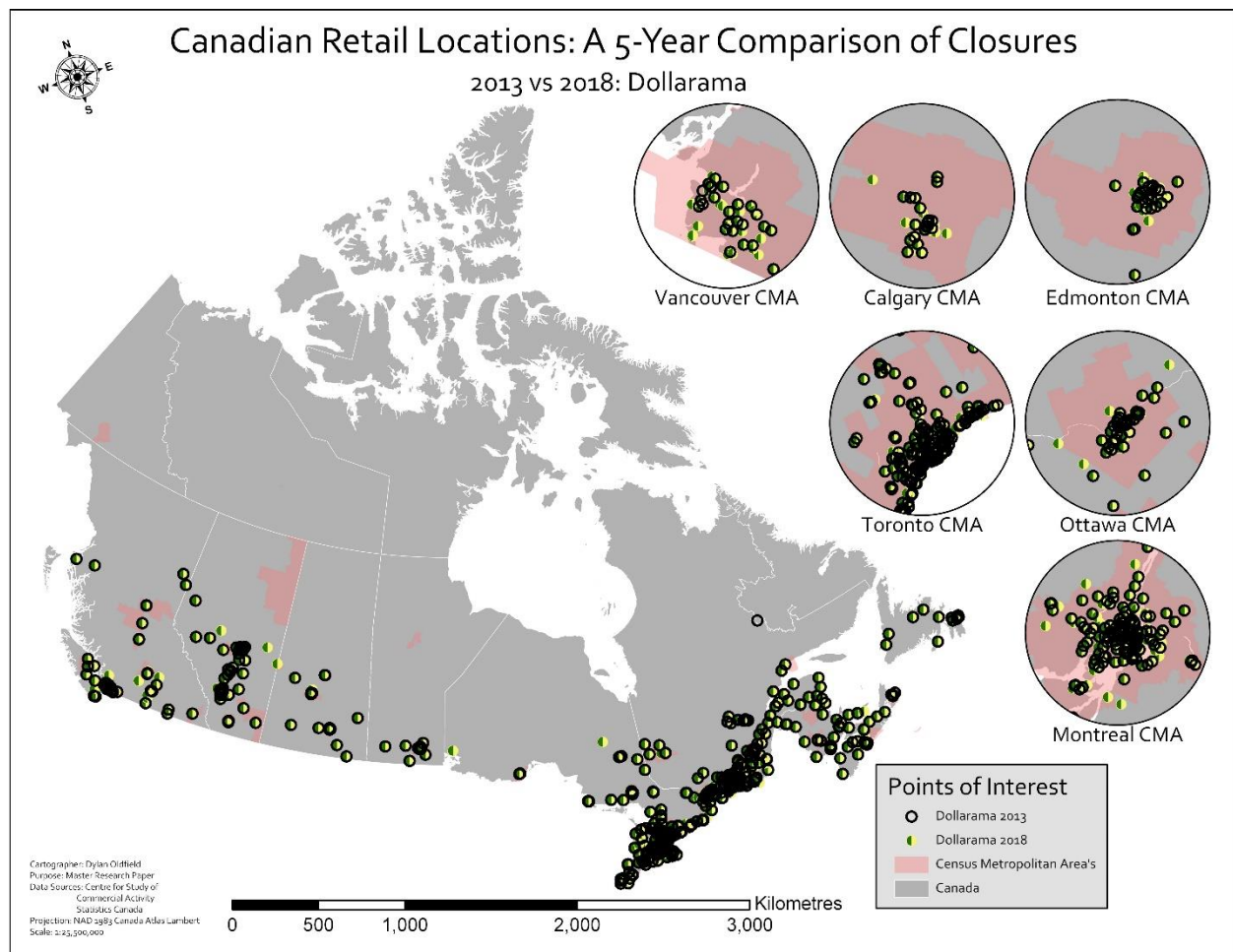


Figure 11. Map of Dollarama's BM Stores of 2013 to 2018

H&M

Table 9. H&M: Retailer Store Count by Province & Population Market Size, 2013 to 2018 Comparison

H&M: Retailer Store Count by Province & Population Market Size, 2013 to 2018 Comparison																			
Province	Population Markets 2013 to 2018 Comparison								Total Store Count		% Change 2013 to 2018	Stores in CMA		Stores not in CMA		% of Total Store Count		% of Total Population	
	>1,000,000		350,000 to 1,000,000		100,000 to 350,000		<100,000												
	2013	2018	2013	2018	2013	2018	2013	2018	2013	2018	2018	2013	2018	2013	2018	2013	2018	2013	2018
Alberta	7	11	0	0	1	1	0	0	8.0	12.0	50.0%	7	11	1	1	13.1%	12.5%	13.4%	11.7%
British Columbia	8	12	0	0	0	1	0	0	8.0	13.0	62.5%	8	12	0	1	13.1%	13.5%	13.5%	12.5%
Manitoba	0	0	0	2	0	0	0	0	0.0	2.0	200.0%	0	2	0	0	0.0%	2.1%	0.0%	3.2%
New Brunswick	0	0	0	0	2	3	0	0	2.0	3.0	50.0%	1	2	1	1	3.3%	3.1%	1.2%	1.5%
Nova Scotia	0	0	1	2	0	0	0	0	1.0	2.0	100.0%	1	2	0	0	1.6%	2.1%	1.9%	1.7%
Ontario	28	39	0	0	0	2	1	0	29.0	41.0	41.4%	28	39	1	2	47.5%	42.7%	45.4%	44.0%
Prince Edward Island	0	0	0	0	0	0	0	1	0.0	1.0	100.0%	0	0	0	1	0.0%	1.0%	0.0%	0.3%
Quebec	12	20	0	0	0	0	1	1	13.0	21.0	61.5%	12	20	1	1	21.3%	21.9%	24.6%	24.1%
Saskatchewan	0	0	0	0	0	1	0	0	0.0	1.0	100.0%	0	1	0	0	0.0%	1.0%	0.0%	1.0%
TOTALS	55	82	1	4	3	8	2	2	61.0	96.0	57%	57	89	4	7				

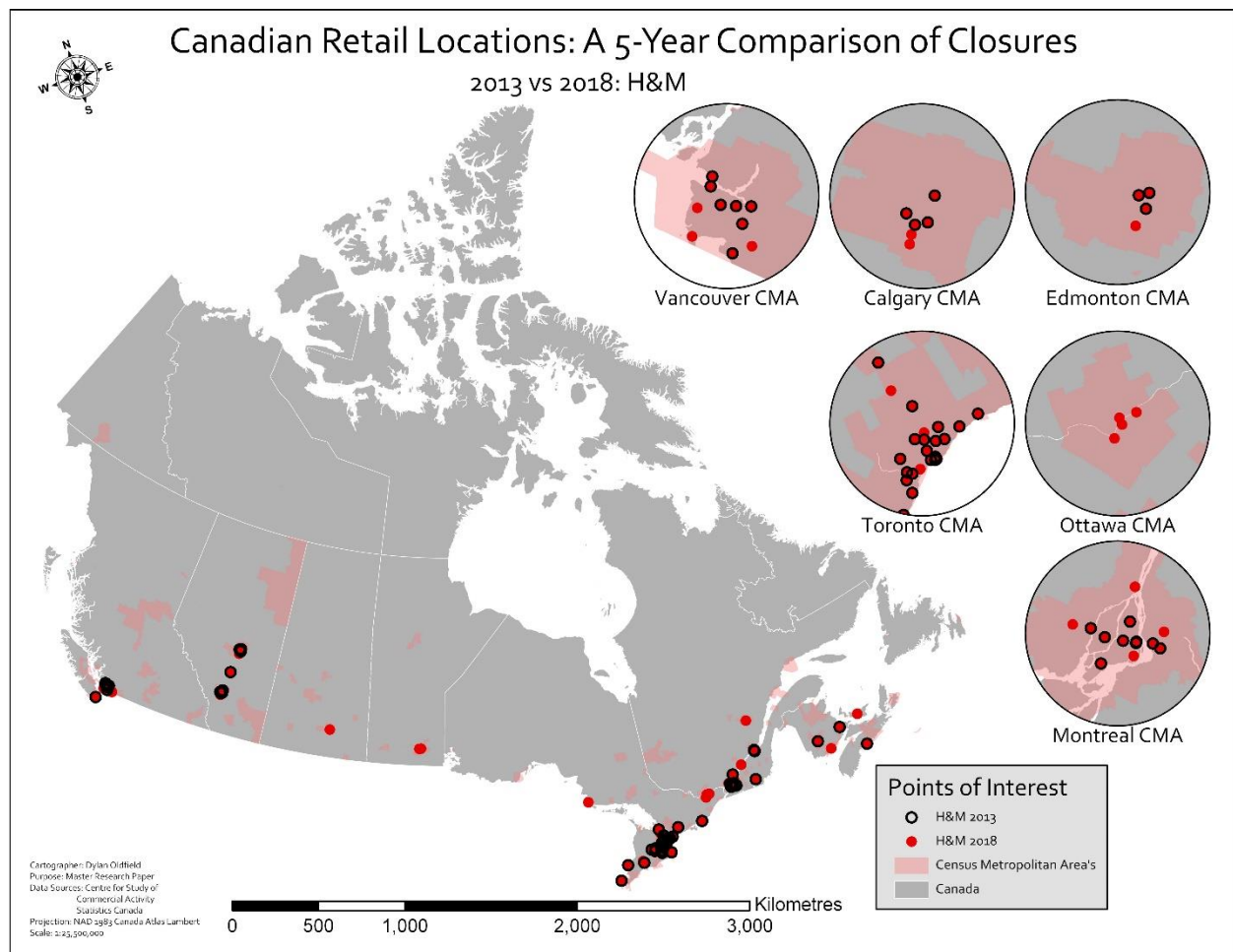


Figure 12. Map of H&M's BM Stores of 2013 to 2018

IKEA

Table 10. IKEA: Retailer Store Count by Province & Population Market Size, 2013 to 2018 Comparison

IKEA: Retailer Store Count by Province & Population Market Size, 2013 to 2018 Comparison																			
Province	Population Markets 2013 to 2018 Comparison								Total Store Count		% Change 2013 to	Stores in CMA		Stores not in CMA		% of Total Store Count		% of Total Population	
	>1,000,000		350,000 to 1,000,000		100,000 to 350,000		<100,000												
	2013	2018	2013	2018	2013	2018	2013	2018	2013	2018	2018	2013	2018	2013	2018	2013	2018	2013	2018
Alberta	2	2	0	0	0	0	0	0	2.0	2.0	0.0%	2	2	0	0	16.7%	15.4%	15.3%	15.0%
British Columbia	2	2	0	0	0	0	0	0	2.0	2.0	0.0%	2	2	0	0	16.7%	15.4%	13.9%	13.6%
Manitoba	0	0	1	1	0	0	0	0	1.0	1.0	0.0%	1	1	0	0	8.3%	7.7%	4.4%	4.3%
Nova Scotia	0	0	0	1	0	0	0	0	0.0	1.0	100.0%	0	1	0	0	0.0%	7.7%	0.0%	2.2%
Ontario	5	5	0	0	0	0	0	0	5.0	5.0	0.0%	5	5	0	0	41.7%	38.5%	43.3%	42.3%
Quebec	2	2	0	0	0	0	0	0	2.0	2.0	0.0%	2	2	0	0	16.7%	15.4%	23.1%	22.6%
TOTALS	11	11	1	2	0	0	0	0	12.0	13.0	8%	12	13	0	0				

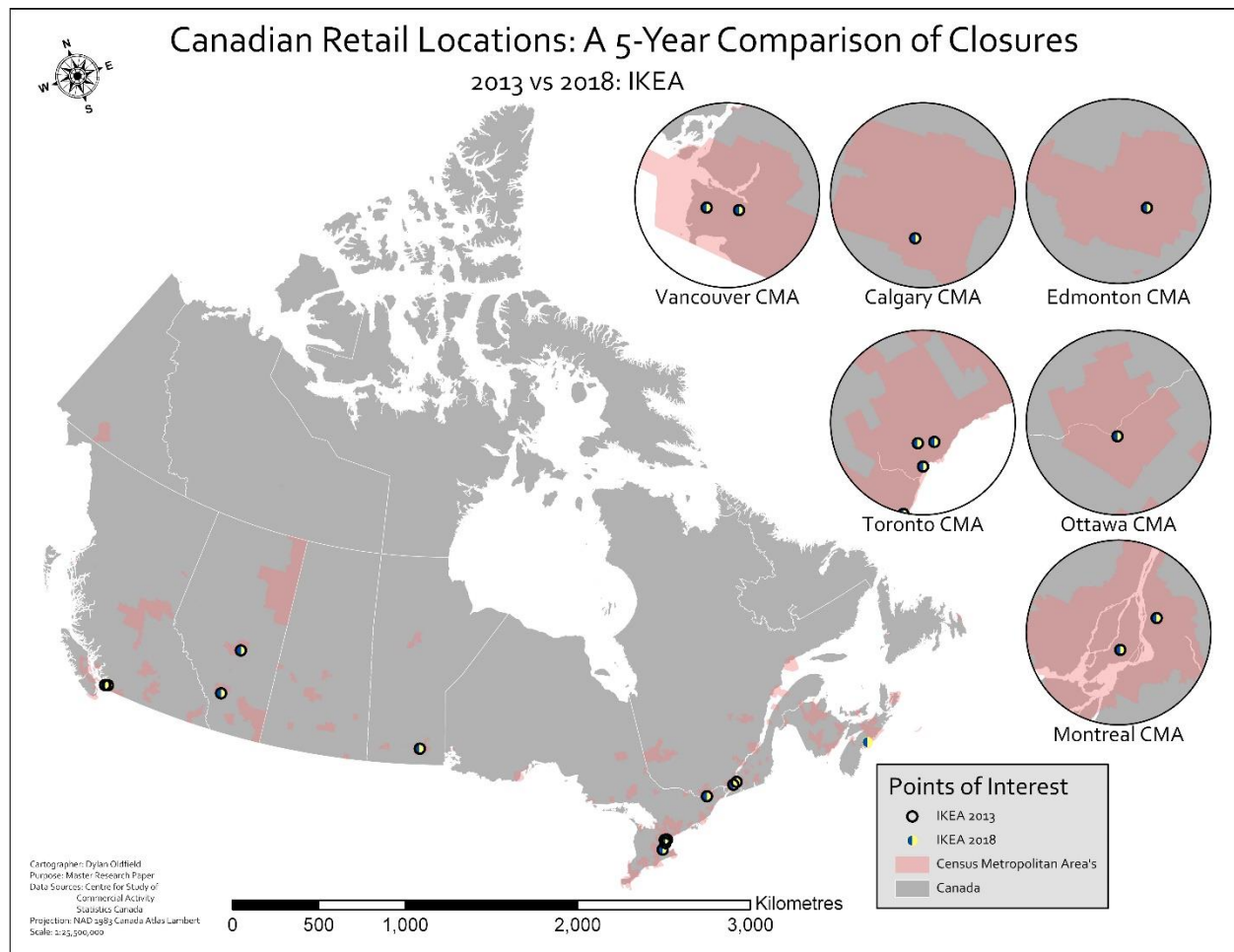


Figure 13. Map of IKEA's BM Stores of 2013 to 2018

Indochino

Table 11. Indochino: Retailer Store Count by Province & Population Market Size, 2013 to 2018 Comparison

Indochino: Retailer Store Count by Province & Population Market Size, 2013 to 2018 Comparison																			
Province	Population Markets 2013 to 2018 Comparison								Total Store Count		% Change 2013 to 2018	Stores in CMA		Stores not in CMA		% of Total Store Count		% of Total Population	
	>1,000,000		350,000 to 1,000,000		100,000 to 350,000		<100,000												
	2013	2018	2013	2018	2013	2018	2013	2018	2013	2018	2018	2013	2018	2013	2018	2013	2018	2013	2018
Alberta	0	2	0	0	0	0	0	0	0.0	2.0	200.0%	0	2	0	0	0.0%	20.0%	0.0%	20.4%
British Columbia	0	2	0	0	0	0	0	0	0.0	2.0	200.0%	0	2	0	0	0.0%	20.0%	0.0%	18.6%
Manitoba	0	0	0	1	0	0	0	0	0.0	1.0	100.0%	0	1	0	0	0.0%	10.0%	0.0%	5.9%
Nova Scotia	0	0	0	1	0	0	0	0	0.0	1.0	100.0%	0	1	0	0	0.0%	10.0%	0.0%	3.0%
Ontario	0	4	0	0	0	0	0	0	0.0	4.0	400.0%	0	4	0	0	0.0%	40.0%	0.0%	52.1%
TOTALS	0	8	0	2	0	0	0	0	0.0	10.0	1000%	0	10	0	0				

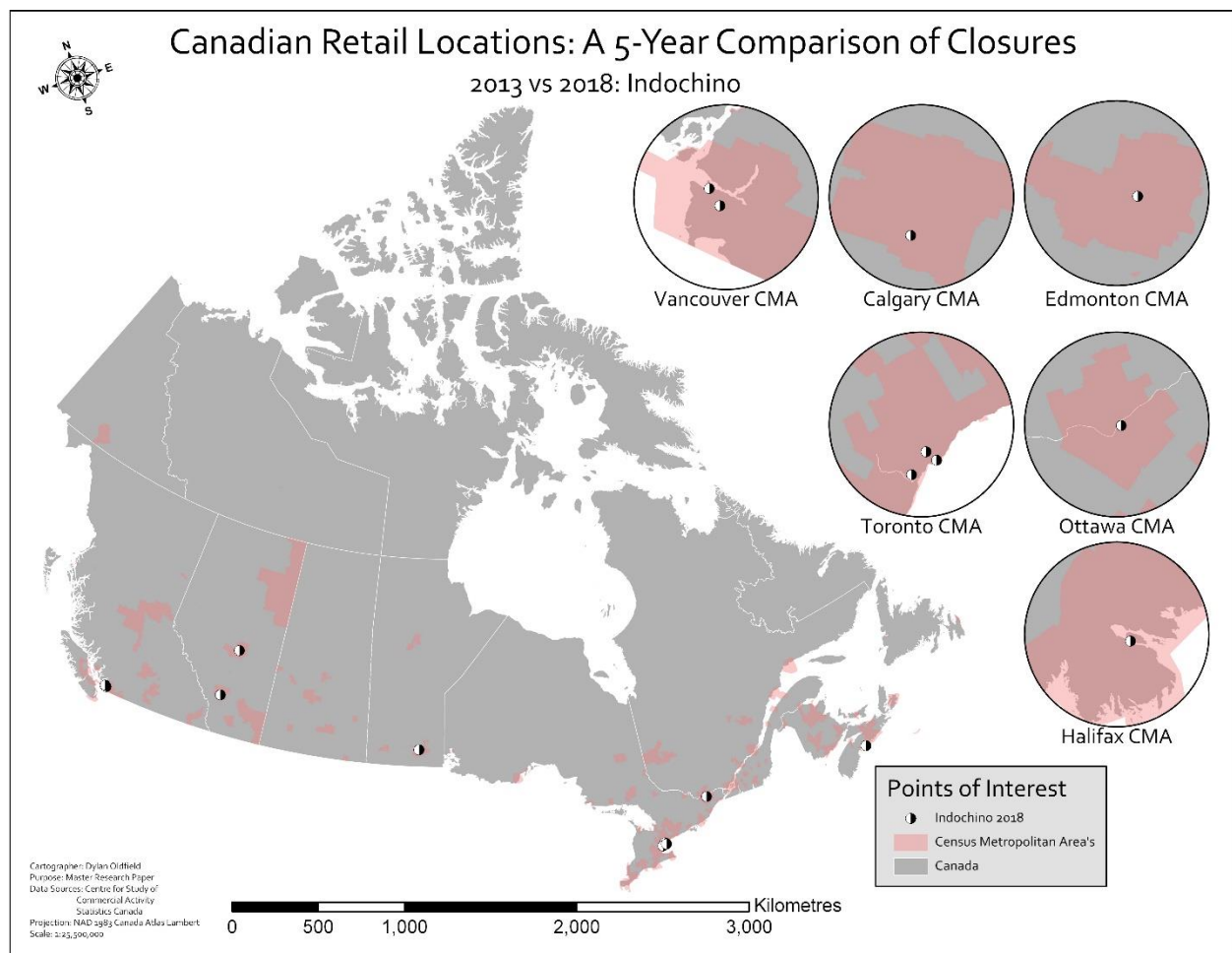


Figure 14. Map of Indochino's BM Stores of 2018

Loblaws

Table 12. Loblaws: Retailer Store Count by Province & Population Market Size, 2013 to 2018 Comparison

Loblaws: Retailer Store Count by Province & Population Market Size, 2013 to 2018 Comparison																			
Province	Population Markets 2013 to 2018 Comparison								Total Store Count		% Change 2013 to 2018	Stores in CMA		Stores not in CMA		% of Total Store Count		% of Total Population	
	>1,000,000		350,000 to 1,000,000		100,000 to 350,000		<100,000												
	2013	2018	2013	2018	2013	2018	2013	2018	2013	2018		2018	2013	2018	2013	2018	2013	2018	2013
British Columbia	1	0	0	0	0	0	0	0	1.0	0.0	-100.0%	1	0	0	0	1.4%	0.0%	15.0%	0.0%
Ontario	39	43	0	0	0	0	2	2	41.0	45.0	9.8%	39	43	2	2	57.7%	100.0%	49.0%	100.0%
Quebec	21	0	7	0	0	0	1	0	29.0	0.0	-100.0%	21	0	8	0	40.8%	0.0%	36.1%	0.0%
TOTALS	61	43	7	0	0	0	3	2	71.0	45.0	-37%	61	43	10	2				

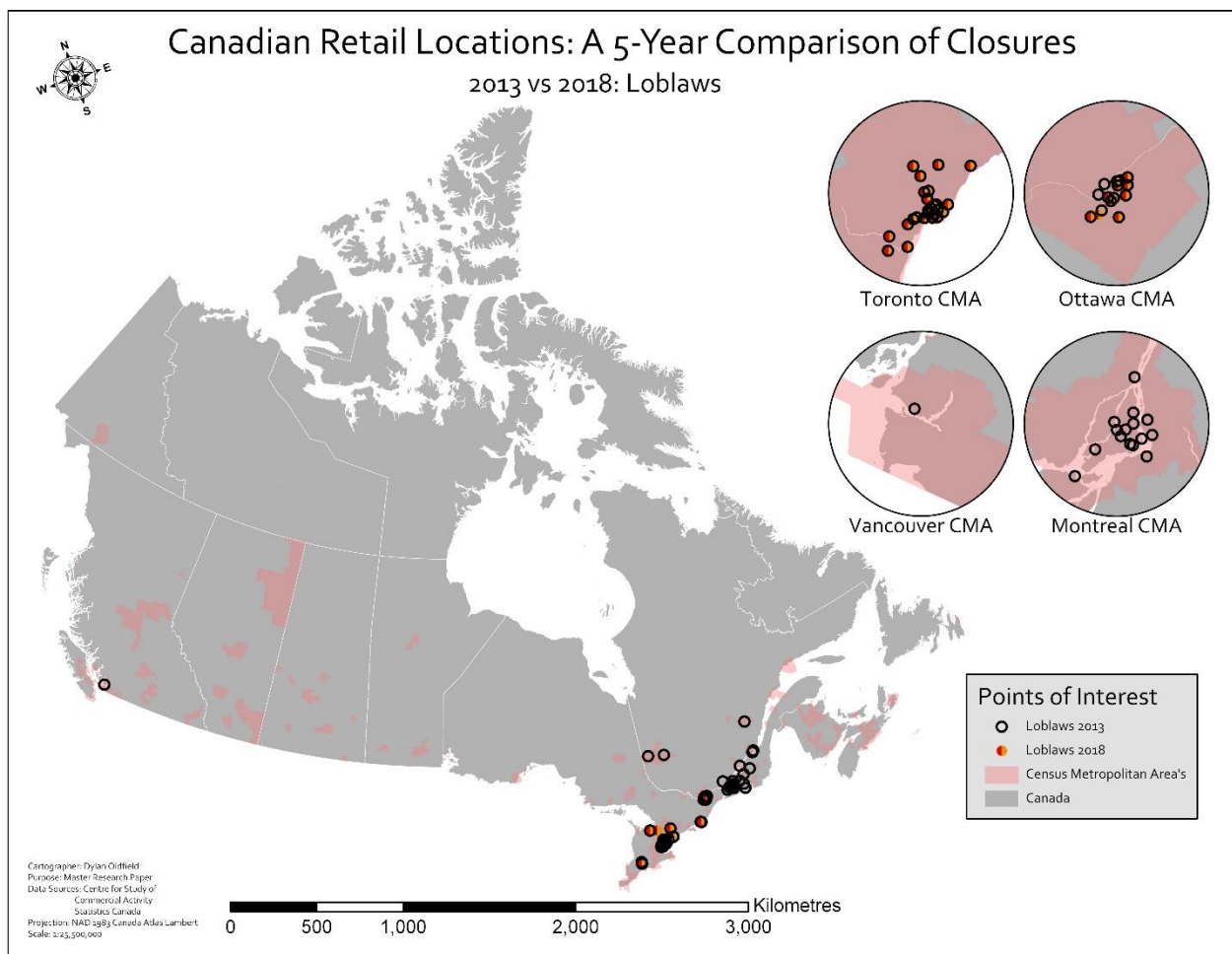


Figure 15. Map of Loblaws' BM Stores of 2013 to 2018

Longo's

Table 13. Longo's: Retailer Store Count by Province & Population Market Size, 2013 to 2018 Comparison

Longo's: Retailer Store Count by Province & Population Market Size, 2013 to 2018 Comparison																			
Province	Population Markets 2013 to 2018 Comparison								Total Store Count		% Change 2013 to 2018	Stores in CMA		Stores not in CMA		% of Total Store Count		% of Total Population	
	>1,000,000		350,000 to 1,000,000		100,000 to 350,000		<100,000					2013	2018	2013	2018	2013	2018	2013	2018
	2013	2018	2013	2018	2013	2018	2013	2018	2013	2018									
Ontario	25	27	0	0	0	0	0	0	25.0	27.0	8.0%	25	27	0	0	100.0%	100.0%	100.0%	100.0%

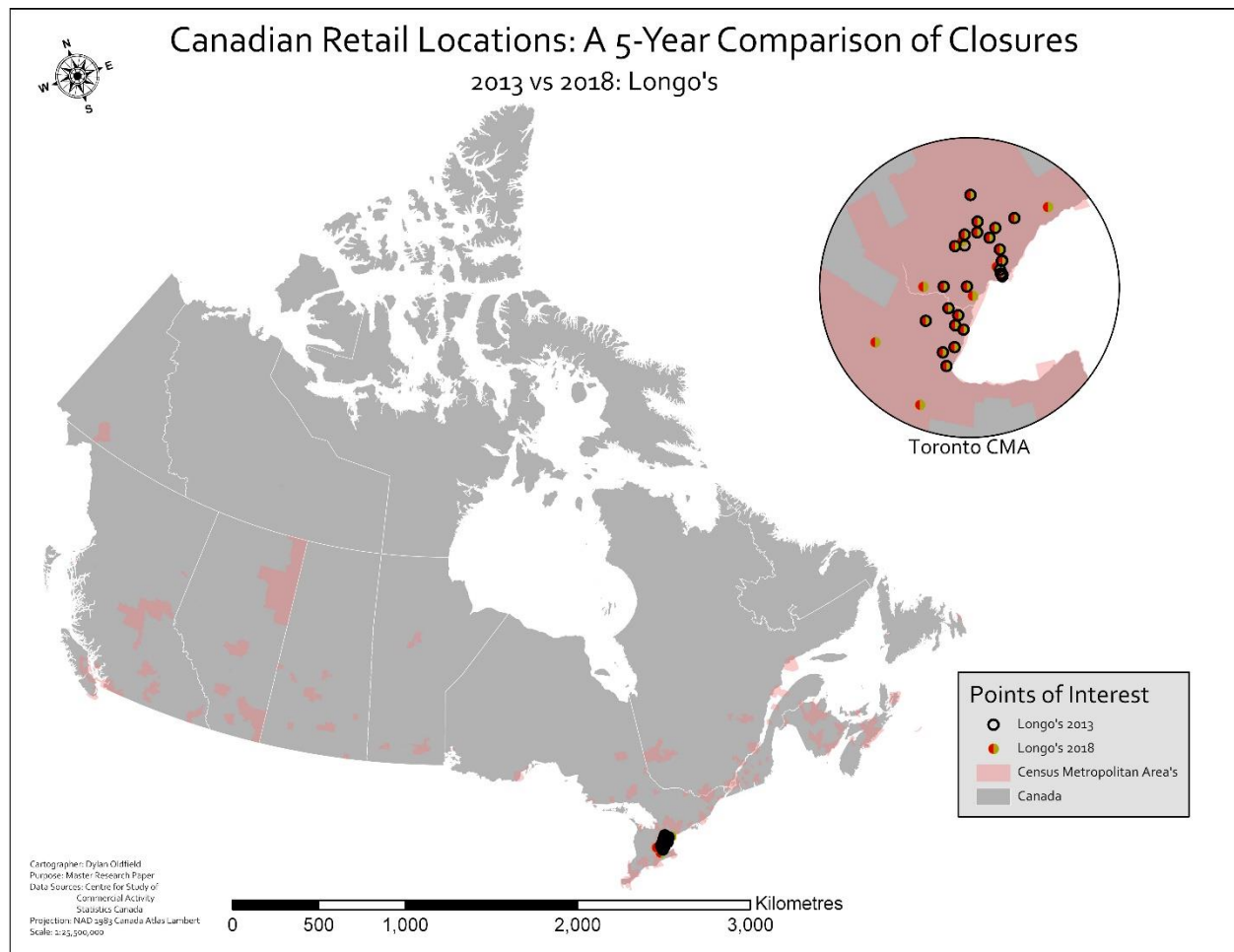


Figure 16. Map of Longo's BM Stores of 2013 to 2018

Mark's

Table 14. Mark's: Retailer Store Count by Province & Population Market Size, 2013 to 2018 Comparison

Mark's: Retailer Store Count by Province & Population Market Size, 2013 to 2018 Comparison																			
Province	Population Markets 2013 to 2018 Comparison								Total Store Count		% Change 2013 to 2018	Stores in CMA		Stores not in CMA		% of Total Store Count		% of Total Population	
	>1,000,000		350,000 to 1,000,000		100,000 to 350,000		<100,000												
	2013	2018	2013	2018	2013	2018	2013	2018	2013	2018	2018	2013	2018	2013	2018	2013	2018	2013	2018
Alberta	31	36	15	19	0	0	17	20	63.0	75.0	19.0%	31	36	32	39	16.6%	18.6%	11.6%	11.6%
British Columbia	47	47	0	0	0	0	11	11	58.0	58.0	0.0%	24	24	34	34	15.3%	14.4%	14.2%	14.2%
Manitoba	0	0	6	7	4	4	3	3	13.0	14.0	7.7%	6	7	7	7	3.4%	3.5%	3.1%	3.1%
New Brunswick	0	0	0	0	9	10	5	3	14.0	13.0	-7.1%	4	5	10	8	3.7%	3.2%	1.6%	1.6%
Newfoundland	0	0	0	0	3	3	4	5	7.0	8.0	14.3%	3	3	4	5	1.8%	2.0%	0.8%	0.8%
Nova Scotia	0	0	7	7	4	4	6	6	17.0	17.0	0.0%	7	7	10	10	4.5%	4.2%	2.1%	2.1%
Ontario	95	100	22	26	0	0	26	26	143.0	152.0	6.3%	95	100	48	52	37.7%	37.6%	41.6%	41.8%
Prince Edward Island	0	0	0	0	0	0	2	2	2.0	2.0	0.0%	0	0	2	2	0.5%	0.5%	0.3%	0.3%
Quebec	30	33	13	13	0	0	4	4	47.0	50.0	6.4%	30	33	17	17	12.4%	12.4%	22.4%	22.1%
Saskatchewan	0	0	6	7	6	5	3	3	15.0	15.0	0.0%	6	7	9	8	4.0%	3.7%	2.3%	2.3%
TOTALS	203	216	69	79	26	26	81	83	379.0	404.0	7%	206	222	173	182				

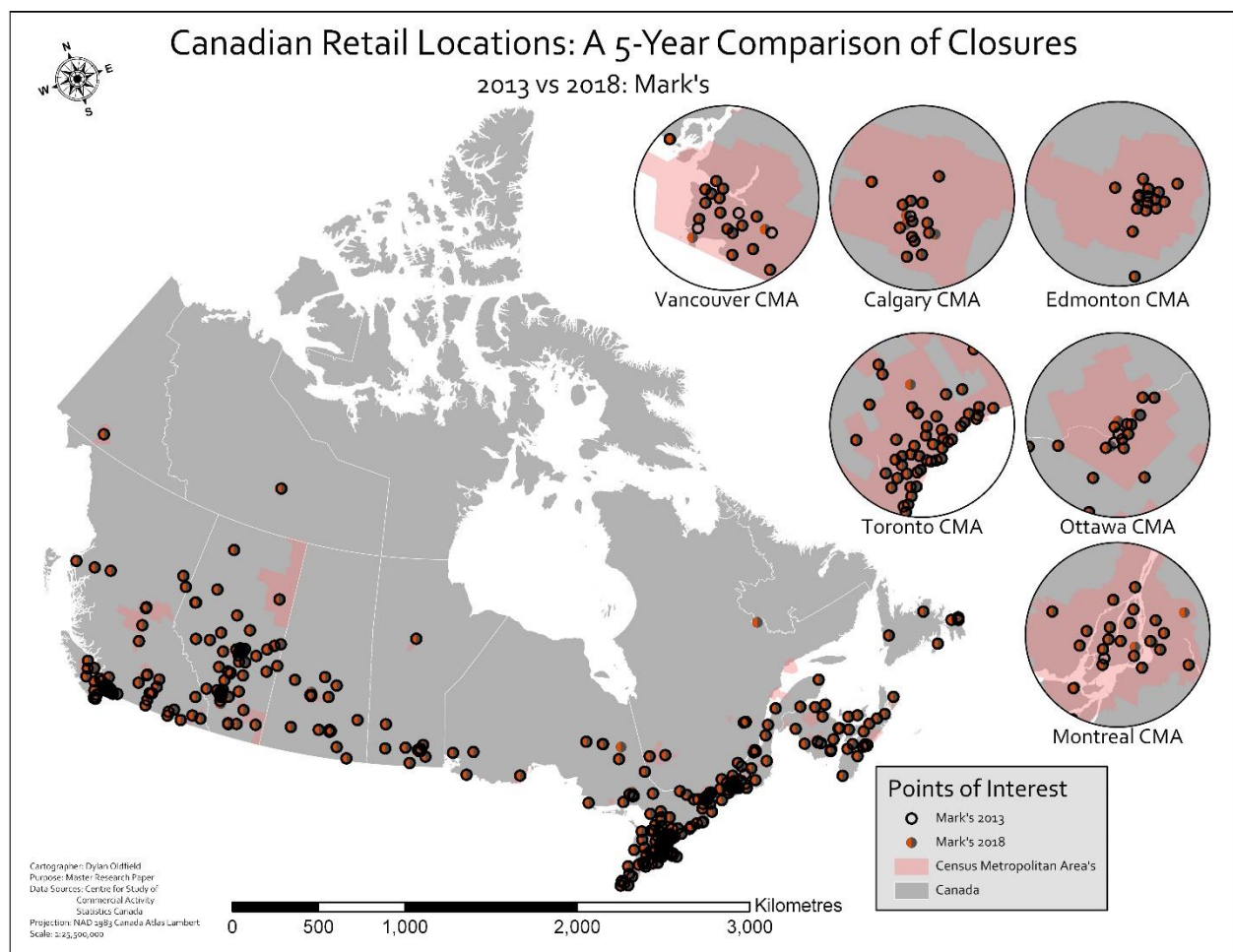


Figure 17. Map of Mark's BM Stores of 2013 to 2018

Metro

Table 15. Metro: Retailer Store Count by Province & Population Market Size, 2013 to 2018 Comparison

Metro: Retailer Store Count by Province & Population Market Size, 2013 to 2018 Comparison																			
Province	Population Markets 2013 to 2018 Comparison								Total Store Count		% Change 2013 to 2018	Stores in CMA		Stores not in CMA		% of Total Store Count		% of Total Population	
	>1,000,000		350,000 to 1,000,000		100,000 to 350,000		<100,000												
	2013	2018	2013	2018	2013	2018	2013	2018	2013	2018	2018	2013	2018	2013	2018	2013	2018	2013	2018
Ontario	117	107	17	16	0	0	11	10	145.0	133.0	-8.3%	117	107	28	26	40.8%	60.7%	64.2%	64.8%
Quebec	130	38	21	0	0	8	59	40	210.0	86.0	-59.0%	130	38	80	48	59.2%	39.3%	35.8%	35.2%
TOTALS	247	145	38	16	0	8	70	50	355.0	219.0	-38%	247	145	108	74				

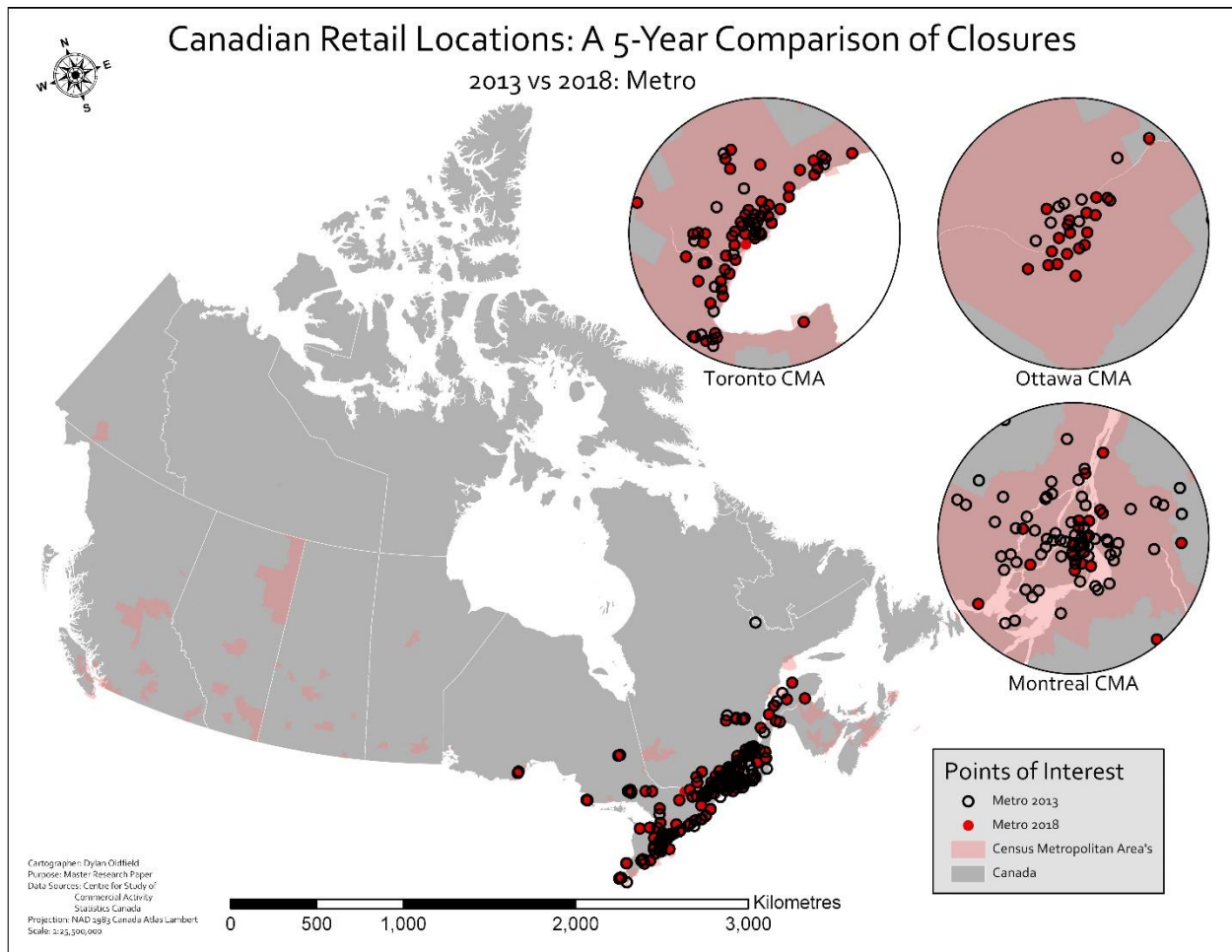


Figure 18. Map of Metro's BM Stores of 2013 to 2018

Sleep Country Canada

Table 16. Sleep Country Canada: Retailer Store Count by Province & Population Market Size, 2013 to 2018 Comparison

Sleep Country Canada: Retailer Store Count by Province & Population Market Size, 2013 to 2018 Comparison																			
Province	Population Markets 2013 to 2018 Comparison								Total Store Count		% Change 2013 to 2018	Stores in CMA		Stores not in CMA		% of Total Store Count		% of Total Population	
	>1,000,000		350,000 to 1,000,000		100,000 to 350,000		<100,000												
	2013	2018	2013	2018	2013	2018	2013	2018	2013	2018	2018	2013	2018	2013	2018	2013	2018	2013	2018
Alberta	22	26	0	0	3	5	0	0	25.0	31.0	24.0%	22	26	3	5	15.8%	15.3%	15.8%	15.5%
British Columbia	27	33	8	10	0	0	0	0	35.0	43.0	22.9%	27	33	8	10	22.2%	21.3%	19.3%	19.0%
Manitoba	0	0	6	7	0	0	1	1	7.0	8.0	14.3%	6	7	1	1	4.4%	4.0%	4.3%	4.2%
New Brunswick	0	0	0	0	0	0	3	0	0.0	3.0	300.0%	0	2	0	1	0.0%	1.5%	0.0%	1.9%
Nova Scotia	0	0	3	5	0	0	1	1	4.0	6.0	50.0%	3	5	1	1	2.5%	3.0%	2.2%	2.1%
Ontario	79	97	0	7	0	0	1	0	80.0	104.0	30.0%	79	97	1	7	50.6%	51.5%	53.9%	54.3%
Prince Edward Island	0	0	0	0	0	0	0	1	0.0	1.0	100.0%	0	0	0	1	0.0%	0.5%	0.0%	0.3%
Quebec	0	0	0	0	1	0	0	0	1.0	0.0	-100.0%	1	0	0	0	0.6%	0.0%	1.7%	0.0%
Saskatchewan	0	0	6	6	0	0	0	0	6.0	6.0	0.0%	6	6	0	0	3.8%	3.0%	2.8%	2.6%
TOTALS	128	156	23	35	4	8	3	3	158.0	202.0	28%	144	176	14	26				

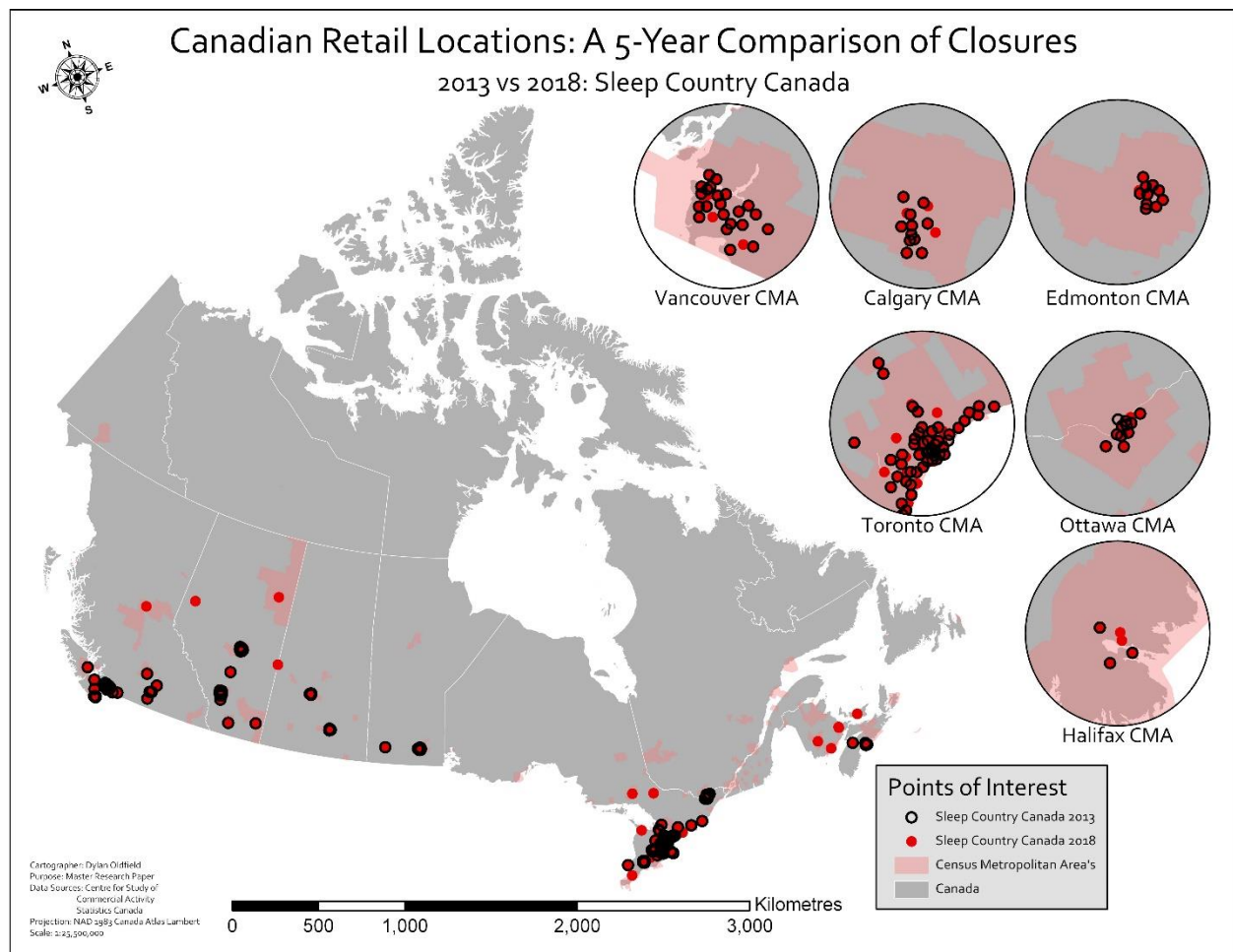


Figure 19. Map of Sleep Country Canada's BM Stores of 2013 to 2018

Staples

Table 17. Staples: Retailer Store Count by Province & Population Market Size, 2013 to 2018 Comparison

Staples: Retailer Store Count by Province & Population Market Size, 2013 to 2018 Comparison																			
Province	Population Markets 2013 to 2018 Comparison								Total Store Count		% Change 2013 to 2018	Stores in CMA		Stores not in CMA		% of Total Store Count		% of Total Population	
	>1,000,000		350,000 to 1,000,000		100,000 to 350,000		<100,000												
	2013	2018	2013	2018	2013	2018	2013	2018	2013	2018	2018	2013	2018	2013	2018	2013	2018	2013	2018
Alberta	26	27	8	8	0	0	4	4	38.0	39.0	2.6%	26	27	12	12	11.6%	13.0%	11.3%	11.3%
British Columbia	23	22	20	20	0	0	0	0	43.0	42.0	-2.3%	23	22	20	20	13.1%	14.0%	14.1%	14.1%
Manitoba	0	0	6	5	0	0	4	4	10.0	9.0	-10.0%	6	5	4	4	3.0%	3.0%	3.0%	3.0%
New Brunswick	0	0	0	0	9	7	1	0	10.0	7.0	-30.0%	5	3	5	4	3.0%	2.3%	1.6%	1.6%
Newfoundland	0	0	0	0	3	3	1	1	4.0	4.0	0.0%	3	3	1	1	1.2%	1.3%	0.8%	0.8%
Nova Scotia	0	0	6	6	4	4	3	3	13.0	13.0	0.0%	6	6	7	7	4.0%	4.3%	2.1%	2.1%
Ontario	100	86	20	20	0	0	7	4	127.0	110.0	-13.4%	100	86	27	24	38.6%	36.7%	41.7%	41.8%
Prince Edward Island	0	0	0	0	0	0	2	2	2.0	2.0	0.0%	0	0	2	2	0.6%	0.7%	0.3%	0.3%
Quebec	55	48	14	14	0	0	2	2	71.0	64.0	-9.9%	55	48	16	16	21.6%	21.3%	22.7%	22.7%
Saskatchewan	0	0	5	5	6	5	0	0	11.0	10.0	-9.1%	5	5	6	5	3.3%	3.3%	2.3%	2.3%
TOTALS	204	183	79	78	22	19	24	20	329.0	300.0	-9%	229	205	100	95				

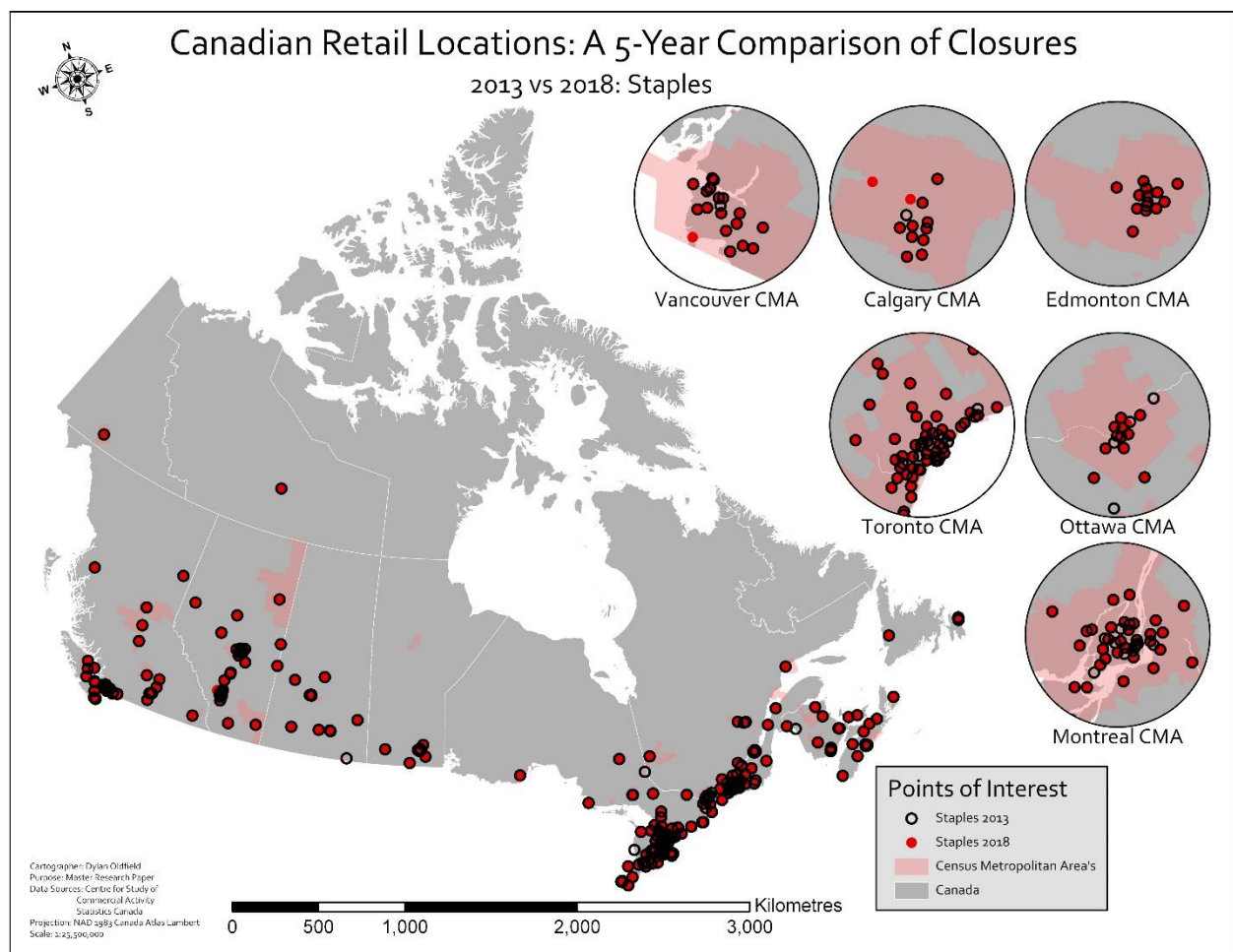


Figure 20. Map of Staples BM Stores of 2013 to 2018

Retail Sectors

Electronics

Table 18. Electronics Retail Sector: Retail Store Count by Province & Population Market Size, 2013 to 2018 Comparison

Electronics Retail Sector: Retail Store Count by Province & Population Market Size, 2013 to 2018 Comparison																			
Province	Population Markets 2013 to 2018 Comparison								Total Store Count		% Change 2013 to 2018	Stores in CMA		Stores not in CMA		% of Total Store Count		% of Total Population	
	>1,000,000		350,000 to 1,000,000		100,000 to 350,000		<100,000												
	2013	2018	2013	2018	2013	2018	2013	2018	2013	2018		2013	2018	2013	2018	2013	2018	2013	2018
Alberta	39	46	10	12	0	0	4	4	53	62	17.0%	39	46	14	16	12.4%	13.4%	11.3%	11.3%
British Columbia	36	42	21	28	0	0	0	0	57	70	22.8%	36	42	21	28	13.3%	15.2%	14.1%	14.1%
Manitoba	0	0	9	9	0	0	4	5	13	14	7.7%	9	9	4	5	3.0%	3.0%	3.0%	3.0%
New Brunswick	0	0	0	0	9	10	1	0	10	10	0.0%	5	5	5	5	2.3%	2.2%	1.6%	1.6%
Newfoundland	0	0	0	0	4	4	1	1	5	5	0.0%	4	4	1	1	1.2%	1.1%	0.8%	0.8%
Nova Scotia	0	0	9	9	4	5	3	3	16	17	6.3%	9	9	7	8	3.7%	3.7%	2.1%	2.1%
Ontario	144	143	20	27	0	0	7	4	171	174	1.8%	144	143	27	31	40.0%	37.7%	41.7%	41.8%
Prince Edward Island	0	0	0	0	0	0	2	3	2	3	50.0%	0	0	2	3	0.5%	0.7%	0.3%	0.3%
Quebec	71	72	14	17	0	0	2	3	87	92	5.7%	71	72	16	20	20.4%	20.0%	22.7%	22.7%
Saskatchewan	0	0	7	8	6	6	0	0	13	14	7.7%	7	8	6	6	3.0%	3.0%	2.3%	2.3%
TOTALS	290	303	90	110	23	25	24	23	427.0	461.0	8%	324	338	103	123				

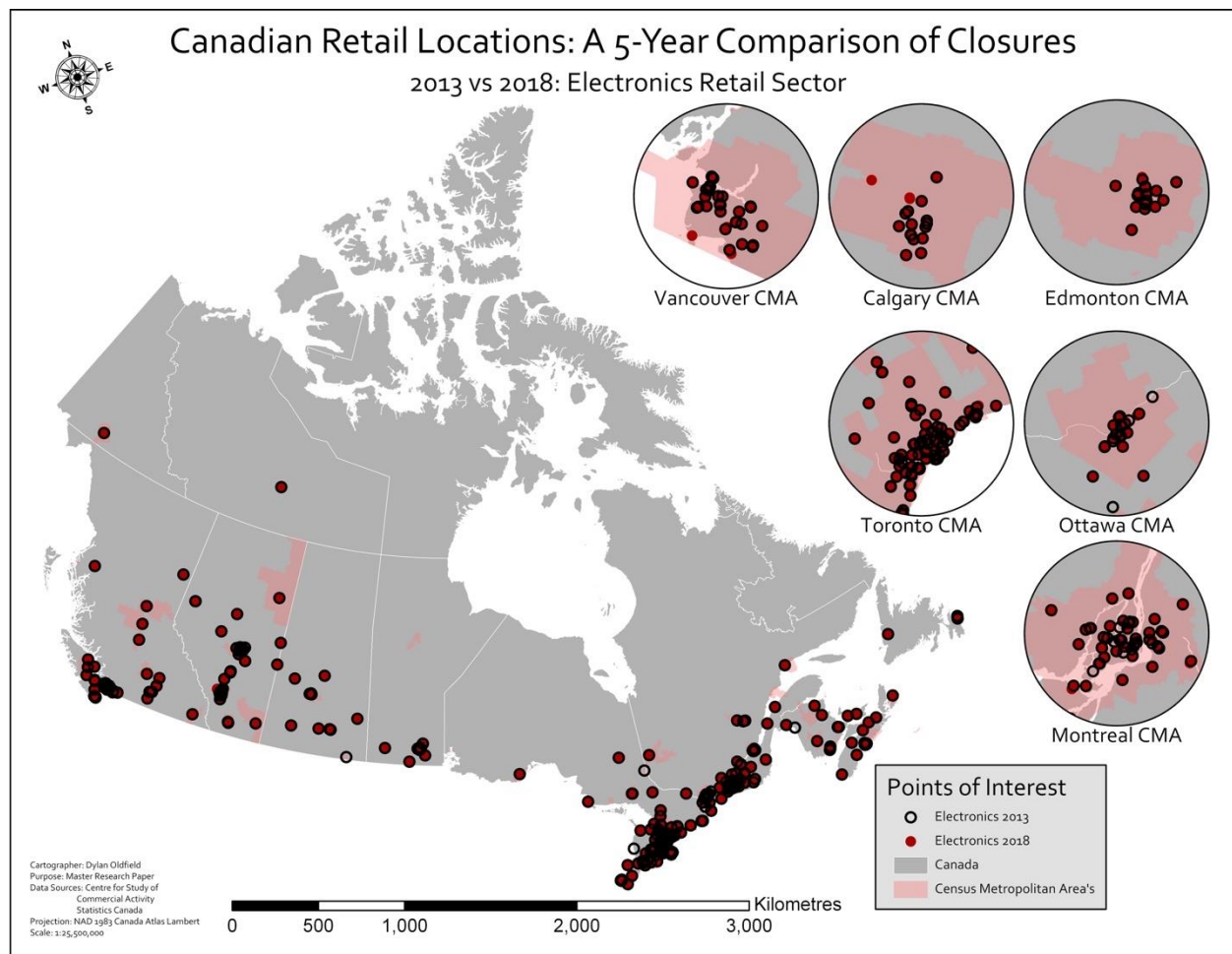


Figure 21. Map of Electronics Sector BM Stores of 2013 to 2018

Fashion

Table 19. Fashion Retail Sector: Retail Store Count by Province & Population Market Size, 2013 to 2018 Comparison

Fashion Retail Sector: Retail Store Count by Province & Population Market Size, 2013 to 2018 Comparison																			
Province	Population Markets 2013 to 2018 Comparison								Total Store Count		% Change 2013 to 2018	Stores in CMA		Stores not in CMA		% of Total Store Count		% of Total Population	
	>1,000,000		350,000 to 1,000,000		100,000 to 350,000		<100,000					2013	2018	2013	2018	2013	2018	2013	2018
	2013	2018	2013	2018	2013	2018	2013	2018	2013	2018									
Alberta	38	49	16	20	0	0	17	20	71	89	25.4%	38	49	33	40	16.1%	17.5%	11.6%	11.6%
British Columbia	55	62	0	0	0	0	11	11	66	73	10.6%	32	38	34	35	15.0%	14.3%	14.2%	14.2%
Manitoba	0	0	6	10	4	4	3	3	13	17	30.8%	6	10	7	7	3.0%	3.3%	3.1%	3.1%
New Brunswick	0	0	0	0	11	13	5	3	16	16	0.0%	5	7	11	9	3.6%	3.1%	1.6%	1.6%
Newfoundland	0	0	0	0	3	3	4	5	7	8	14.3%	3	3	4	5	1.6%	1.6%	0.8%	0.8%
Nova Scotia	0	0	8	10	4	4	6	6	18	20	11.1%	8	10	10	10	4.1%	3.9%	2.1%	2.1%
Ontario	123	143	23	28	0	0	26	26	172	197	14.5%	123	143	49	54	39.1%	38.6%	41.6%	41.8%
Prince Edward Island	0	0	0	0	0	0	2	3	2	3	50.0%	0	0	2	3	0.5%	0.6%	0.3%	0.3%
Quebec	42	53	14	14	0	0	4	4	60	71	18.3%	42	53	18	18	13.6%	13.9%	22.4%	22.1%
Saskatchewan	0	0	6	8	6	5	3	3	15	16	6.7%	6	8	9	8	3.4%	3.1%	2.3%	2.3%
TOTALS	258	307	73	90	28	29	81	84	440.0	510.0	16%	263	321	177	189				

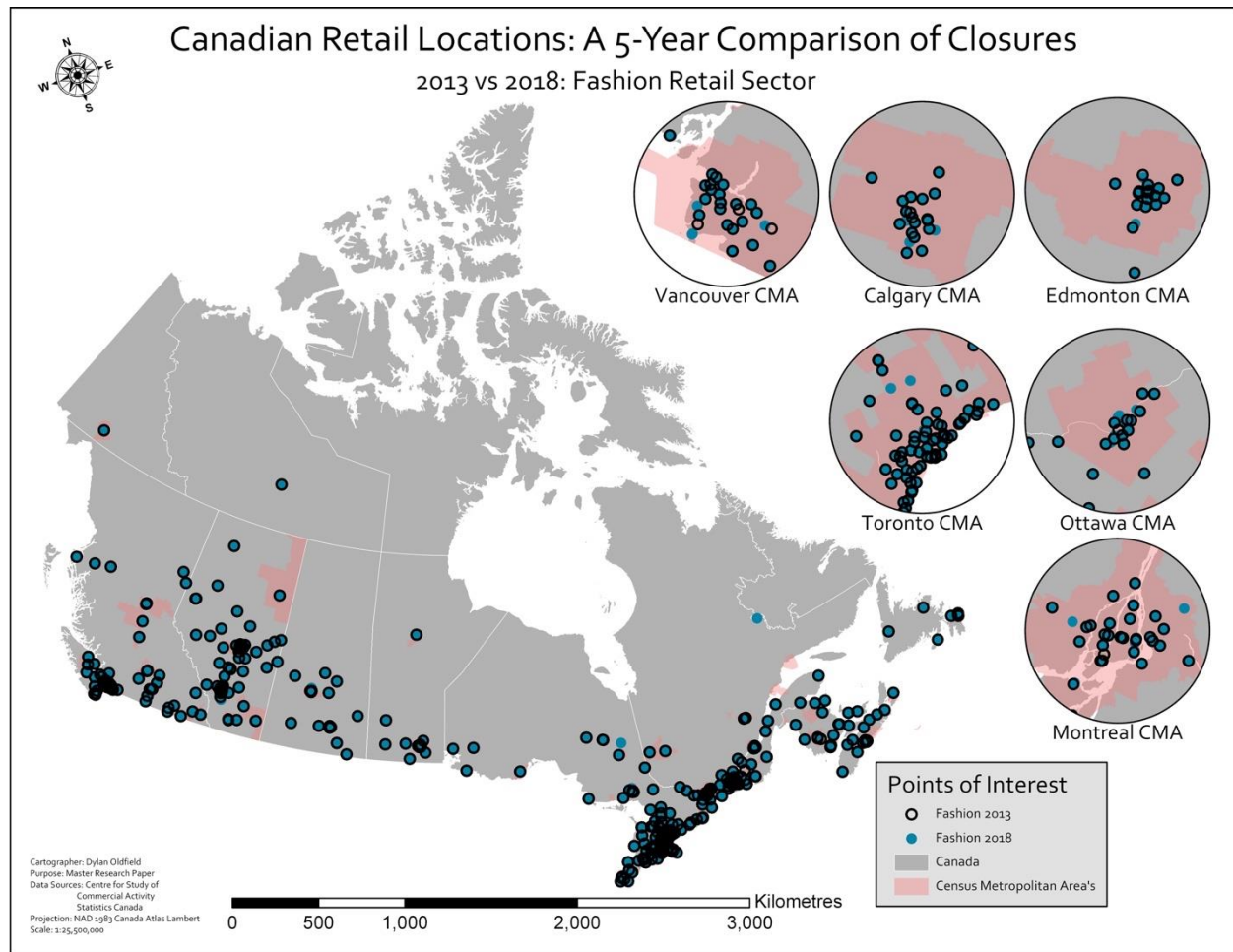


Figure 22. Map of Fashion Sector BM Stores of 2013 to 2018

Miscellaneous

Table 20. Miscellaneous Retail Sector: Retail Store Count by Province & Population Market Size, 2013 to 2018 Comparison

Miscellaneous Retail Sector: Retail Store Count by Province & Population Market Size, 2013 to 2018 Comparison																			
Province	Population Markets 2013 to 2018 Comparison								Total Store Count		% Change 2013 to 2018	Stores in CMA		Stores not in CMA		% of Total Store Count		% of Total Population	
	>1,000,000		350,000 to 1,000,000		100,000 to 350,000		<100,000					2013	2018	2013	2018	2013	2018	2013	2018
	2013	2018	2013	2018	2013	2018	2013	2018											
Alberta	70	102	14	21	0	0	8	9	92	132	43.5%	70	102	22	30	9.3%	9.8%	8.3%	7.3%
British Columbia	57	136	30	0	0	0	3	5	90	141	56.7%	57	89	33	52	9.1%	10.5%	10.4%	9.1%
Manitoba	0	0	26	35	0	0	6	8	32	43	34.4%	26	35	6	8	3.2%	3.2%	2.2%	1.9%
New Brunswick	0	0	0	0	18	28	9	9	27	37	37.0%	7	15	20	22	2.7%	2.7%	1.2%	1.0%
Newfoundland	0	0	0	0	5	7	9	8	14	15	7.1%	5	7	9	8	1.4%	1.1%	0.7%	0.6%
Nova Scotia	0	0	14	24	9	9	8	9	31	42	35.5%	14	24	17	18	3.1%	3.1%	1.6%	1.4%
Ontario	361	540	43	0	0	0	23	31	427	571	33.7%	361	478	66	93	43.1%	42.4%	46.1%	53.1%
Prince Edward Island	0	0	0	0	0	0	3	6	3	6	100.0%	0	0	3	6	0.3%	0.4%	0.2%	0.2%
Quebec	171	229	35	44	0	0	43	52	249	325	30.5%	171	229	78	96	25.1%	24.1%	27.6%	23.9%
Saskatchewan	0	0	18	25	7	8	1	1	26	34	30.8%	18	25	8	9	2.6%	2.5%	1.7%	1.5%
TOTALS	659	1007	180	149	39	52	113	138	991.0	1346.0	36%	729	1004	262	342				

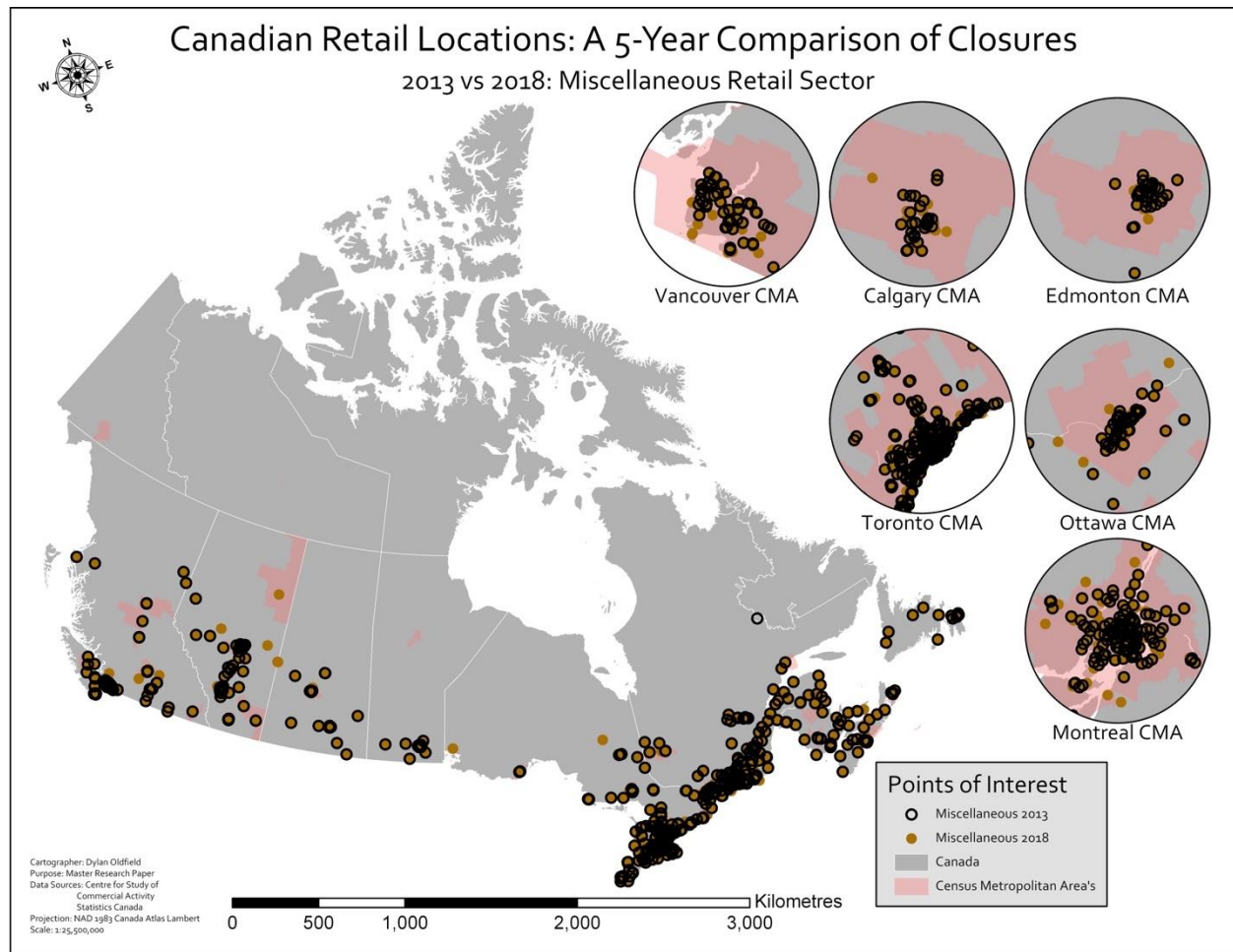


Figure 23. Map of Miscellaneous Sector BM Stores of 2013 to 2018

Grocery

Table 21. Grocery Retail Sector: Retail Store Count by Province & Population Market Size, 2013 to 2018 Comparison

Grocery Retail Sector: Retail Store Count by Province & Population Market Size, 2013 to 2018 Comparison																				
Province	Population Markets 2013 to 2018 Comparison								Total Store Count		% Change 2013 to 2018	Stores in CMA		Stores not in CMA		% of Total Store Count		% of Total Population		
	>1,000,000		350,000 to 1,000,000		100,000 to 350,000		<100,000													
	2013	2018	2013	2018	2013	2018	2013	2018	2013	2018	2018	2013	2018	2013	2018	2013	2018	2013	2018	
British Columbia	1	0	0	0	0	0	0	0	1	0	-100.0%	1	0	0	0	0.2%	0.0%	9.3%	0.0%	
Ontario	181	177	19	18	0	0	0	11	10	211	205	-2.8%	181	177	30	28	46.8%	70.4%	66.1%	65.0%
Quebec	151	38	28	0	0	8	60	40	239	86	-64.0%	151	38	88	48	53.0%	29.6%	24.6%	35.0%	
TOTALS	333	215	47	18	0	8	71	50	451.0	291.0	-35%	333	215	118	76					

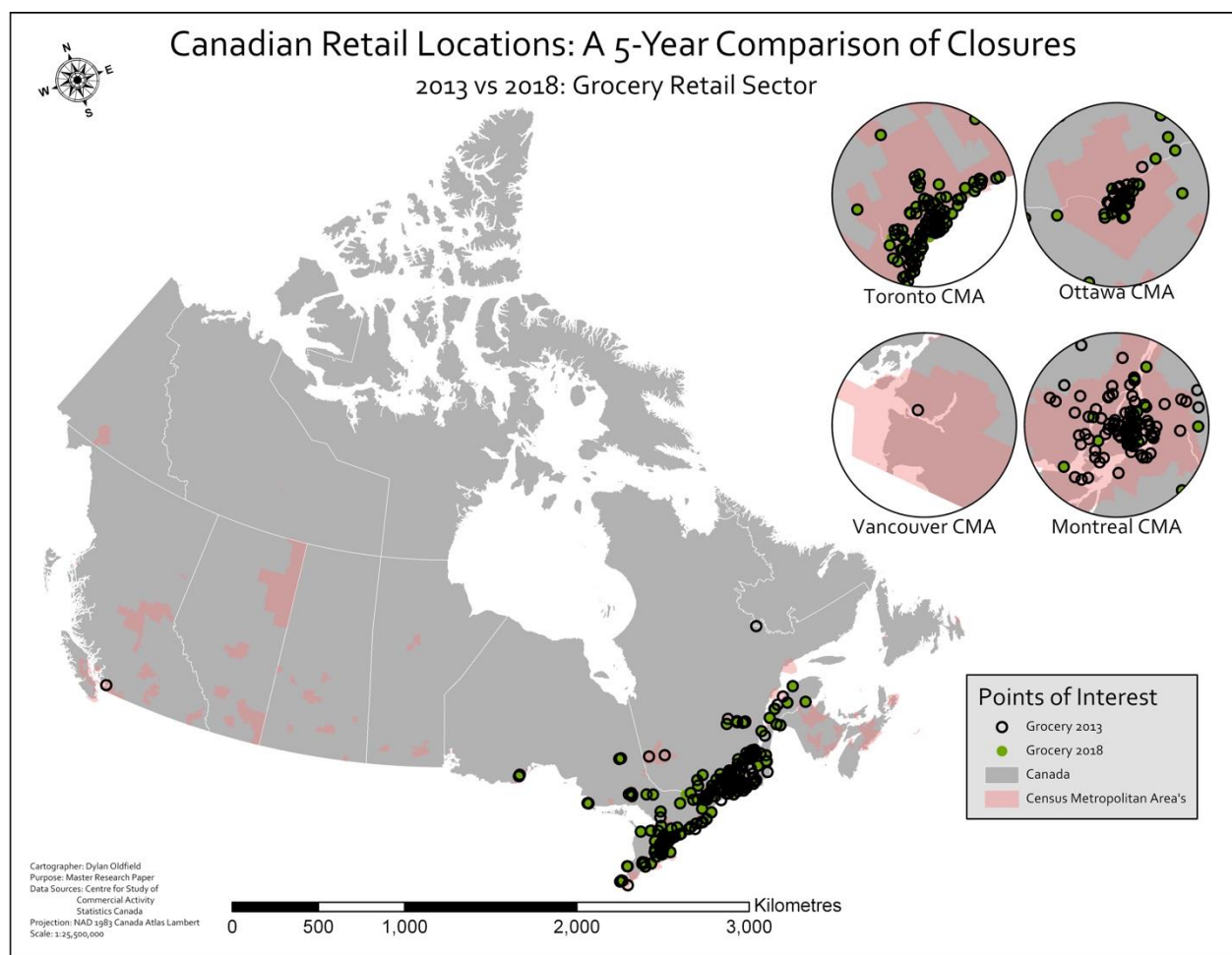


Figure 24. Map of Grocery Sector BM Stores of 2013 to 2018

Quadrants

Artisan

Table 22. Artisan Quadrant: Retail Store Count by Province & Population Market Size, 2013 to 2018 Comparison

Artisan Quadrant: Retail Store Count by Province & Population Market Size, 2013 to 2018 Comparison																				
Province	Population Markets 2013 to 2018 Comparison								Total Store Count		% Change 2013 to 2018	Stores in CMA		Stores not in CMA		% of Total Store Count		% of Total Population		
	>1,000,000		350,000 to 1,000,000		100,000 to 350,000		<100,000													
	2013	2018	2013	2018	2013	2018	2013	2018	2013	2018	2018	2013	2018	2013	2018	2013	2018	2013	2018	
British Columbia	1	0	0	0	0	0	0	0	1	0	-100.0%	1	0	0	0	1.0%	0.0%	14.3%	0.0%	
Ontario	64	70	0	0	0	0	2	2	66	72	9.1%	64	70	2	2	68.8%	100.0%	51.2%	100.0%	
Quebec	21	0	7	0	0	0	0	1	0	29	0	-100.0%	21	0	8	0	30.2%	0.0%	34.5%	0.0%
TOTALS	86	70	7	0	0	0	3	2	96.0	72.0	-25%	86	70	10	2					

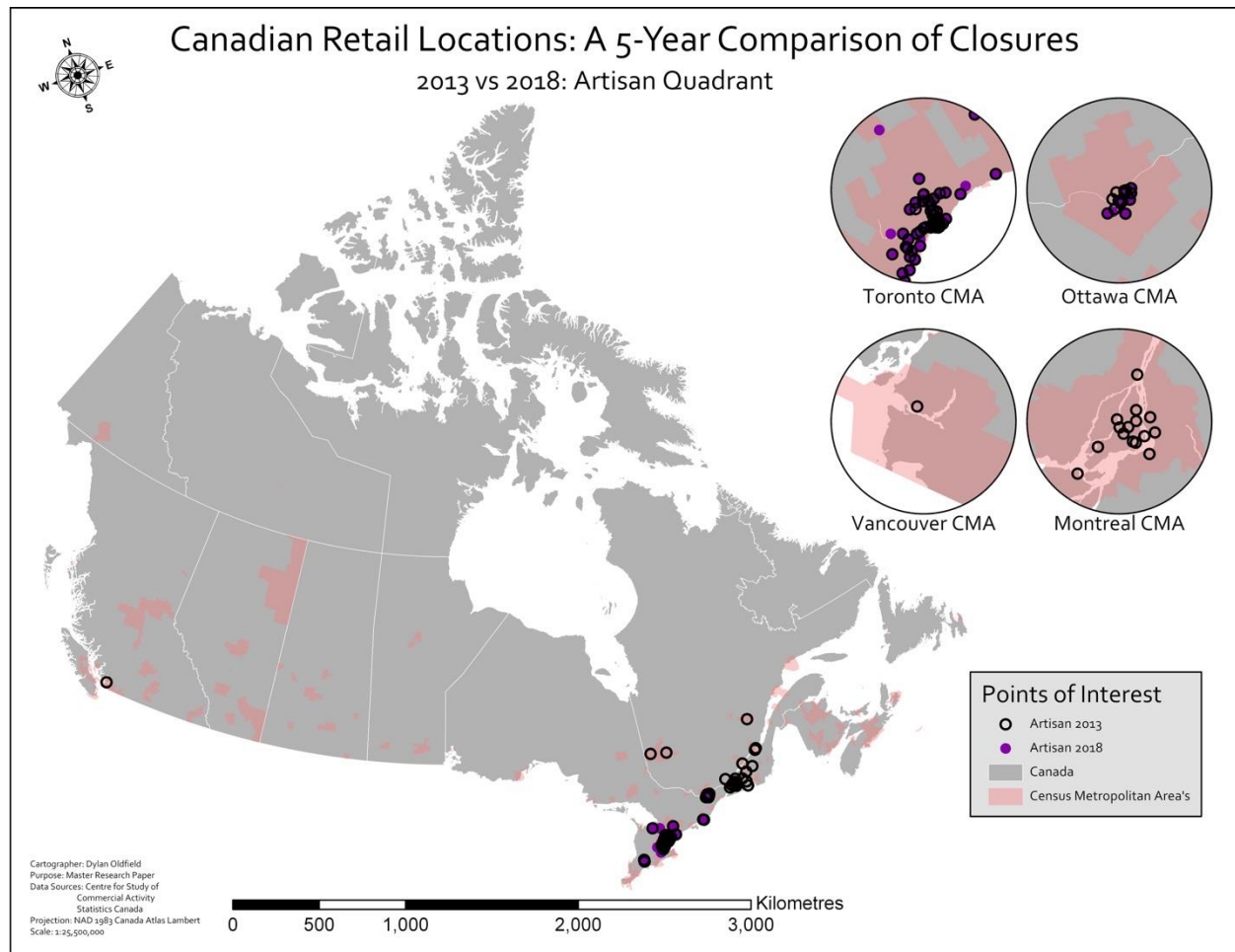


Figure 25. Map of Artisan Quadrant BM Stores of 2013 to 2018

Elite

Table 23. Elite Quadrant: Retail Store Count by Province & Population Market Size, 2013 to 2018 Comparison

Elite Quadrant: Retail Store Count by Province & Population Market Size, 2013 to 2018 Comparison																			
Province	Population Markets 2013 to 2018 Comparison								Total Store Count		% Change 2013 to 2018	Stores in CMA		Stores not in CMA		% of Total Store Count		% of Total Population	
	>1,000,000		350,000 to 1,000,000		100,000 to 350,000		<100,000					2013	2018	2013	2018	2013	2018	2013	2018
	2013	2018	2013	2018	2013	2018	2013	2018											
Alberta	15	21	0	0	2	4	0	0	17	25	47.1%	15	21	2	4	15.5%	14.4%	12.8%	11.5%
British Columbia	15	22	0	8	1	0	0	0	16	30	87.5%	15	22	1	8	14.5%	17.2%	12.1%	14.0%
Manitoba	0	0	4	5	0	0	0	1	4	6	50.0%	4	5	0	1	3.6%	3.4%	3.3%	3.1%
New Brunswick	0	0	0	0	0	3	0	0	0	3	300.0%	0	2	0	1	0.0%	1.7%	0.0%	1.4%
Newfoundland	0	0	0	0	1	1	0	0	1	1	0.0%	1	1	0	0	0.9%	0.6%	0.9%	0.8%
Nova Scotia	0	0	3	4	0	0	0	1	3	5	66.7%	3	4	0	1	2.7%	2.9%	1.7%	1.9%
Ontario	49	62	0	7	0	0	0	0	49	69	40.8%	49	62	0	7	44.5%	39.7%	44.5%	42.6%
Prince Edward Island	0	0	0	0	0	0	0	1	0	1	100.0%	0	0	0	1	0.0%	0.6%	0.0%	0.3%
Quebec	18	26	0	0	0	3	0	1	18	30	66.7%	18	26	0	4	16.4%	17.2%	22.3%	22.3%
Saskatchewan	0	0	2	3	0	0	0	1	2	4	100.0%	2	3	0	1	1.8%	2.3%	2.3%	2.1%
TOTALS	97	131	9	27	4	11	0	5	110.0	174.0	58%	107	146	3	28				

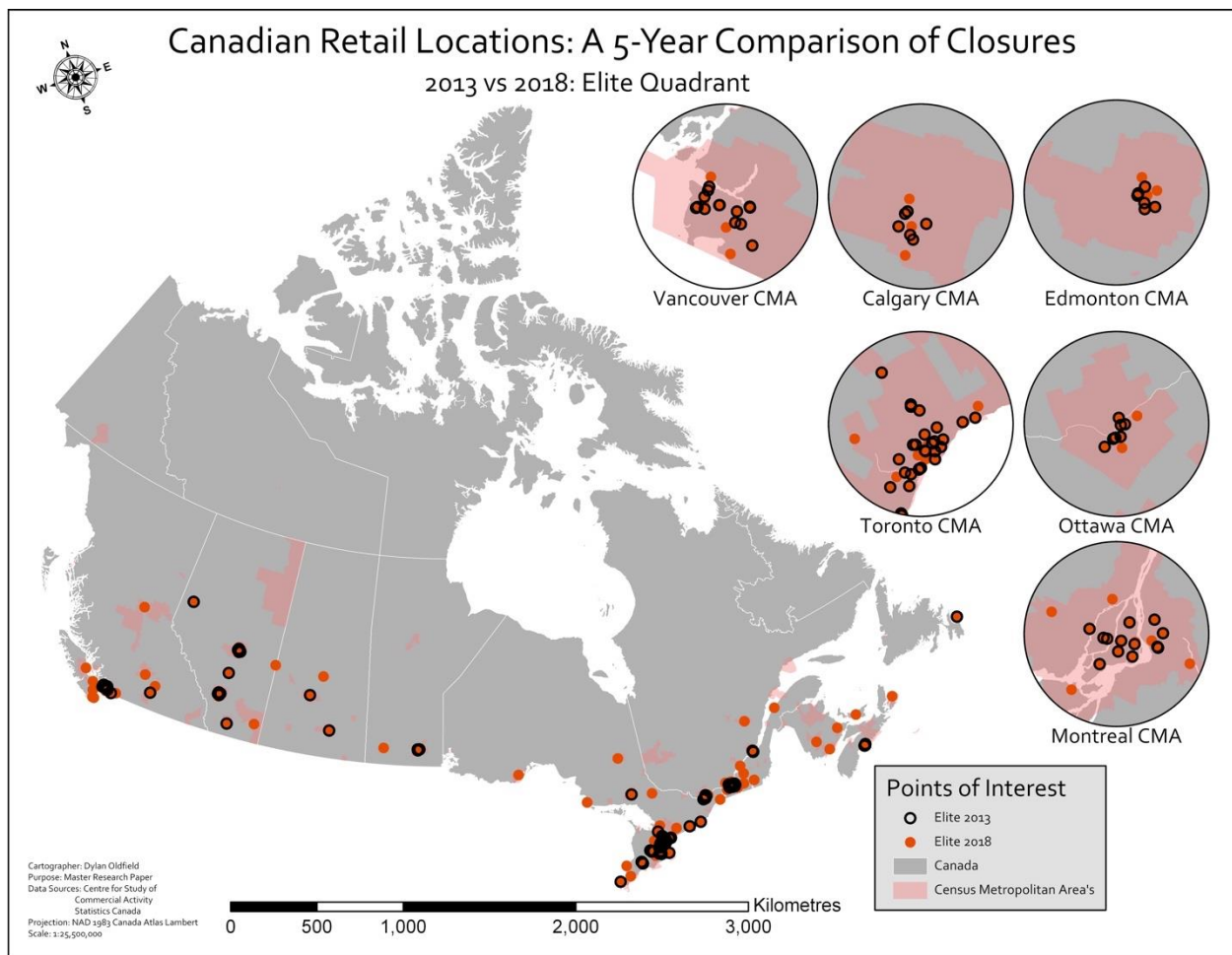


Figure 26. Map of Elite Quadrant BM Stores of 2013 to 2018

Mundane

Table 24. Mundane Quadrant: Retail Store Count by Province & Population Market Size, 2013 to 2018 Comparison

Mundane Quadrant: Retail Store Count by Province & Population Market Size, 2013 to 2018 Comparison																			
Province	Population Markets 2013 to 2018 Comparison								Total Store Count		% Change 2013 to 2018	Stores in CMA		Stores not in CMA		% of Total Store Count		% of Total Population	
	>1,000,000		350,000 to 1,000,000		100,000 to 350,000		<100,000												
	2013	2018	2013	2018	2013	2018	2013	2018	2013	2018	2018	2013	2018	2013	2018	2013	2018	2013	2018
Alberta	79	112	20	25	0	0	12	13	111	150	35.1%	79	112	32	38	7.1%	8.6%	6.8%	6.8%
British Columbia	101	146	0	0	0	0	3	5	104	151	45.2%	59	88	45	63	6.6%	8.6%	8.3%	8.3%
Manitoba	0	0	25	34	0	0	9	11	34	45	32.4%	25	34	9	11	2.2%	2.6%	1.8%	1.8%
New Brunswick	0	0	0	0	29	35	10	9	39	44	12.8%	13	18	26	26	2.5%	2.5%	1.0%	1.0%
Newfoundland	0	0	0	0	8	10	10	9	18	19	5.6%	8	10	10	9	1.1%	1.1%	0.5%	0.5%
Nova Scotia	0	0	18	26	12	12	11	12	41	50	22.0%	18	26	23	24	2.6%	2.9%	1.2%	1.2%
Ontario	522	701	80	0	0	0	41	45	643	746	16.0%	522	608	121	138	41.1%	42.7%	48.7%	48.7%
Prince Edward Island	0	0	0	0	0	0	5	8	5	8	60.0%	0	0	5	8	0.3%	0.5%	0.2%	0.2%
Quebec	365	333	71	67	0	0	104	94	540	494	-8.5%	365	333	175	161	34.5%	28.3%	30.3%	30.2%
Saskatchewan	0	0	17	25	13	13	1	1	31	39	25.8%	17	25	14	14	2.0%	2.2%	1.4%	1.4%
TOTALS	1067	1292	231	177	62	70	206	207	1566.0	1746.0	11%	1106	1254	460	492				

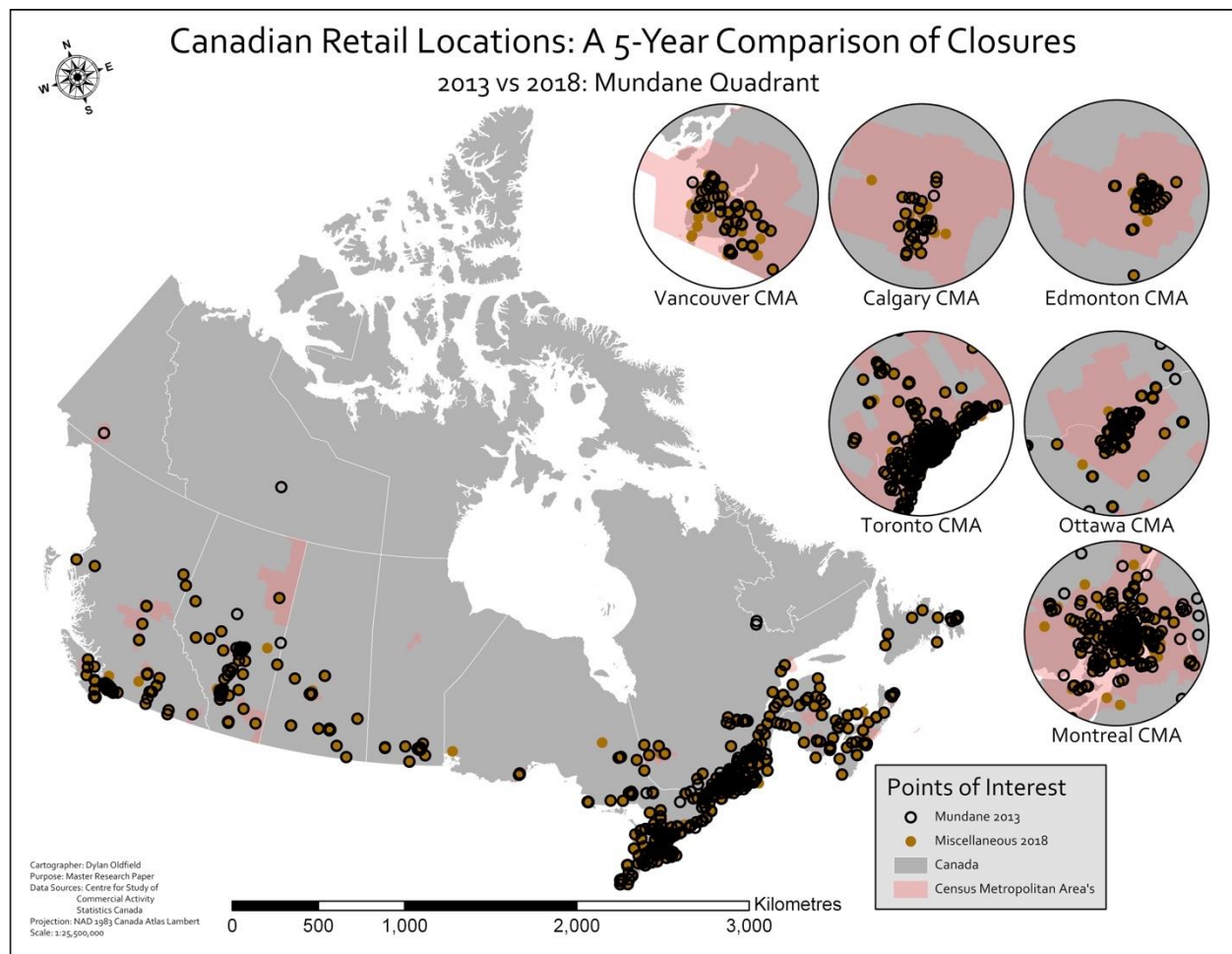


Figure 27. Map of Mundane Quadrant BM Stores of 2013 to 2018

Unique

Table 25. Unique Quadrant: Retail Store Count by Province & Population Market Size, 2013 to 2018 Comparison

Unique Quadrant: Retail Store Count by Province & Population Market Size, 2013 to 2018 Comparison																			
Province	Population Markets 2013 to 2018 Comparison								Total Store Count		% Change 2013 to 2018	Stores in CMA		Stores not in CMA		% of Total Store Count		% of Total Population	
	>1,000,000		350,000 to 1,000,000		100,000 to 350,000		<100,000												
	2013	2018	2013	2018	2013	2018	2013	2018	2013	2018	2018	2013	2018	2013	2018	2013	2018	2013	2018
Alberta	53	64	18	24	0	0	17	20	88	108	22.7%	53	64	35	44	16.4%	17.5%	11.6%	11.6%
British Columbia	82	92	0	0	0	0	11	11	93	103	10.8%	51	59	42	44	17.3%	16.7%	14.2%	14.2%
Manitoba	0	0	12	15	5	5	3	3	20	23	15.0%	12	15	8	8	3.7%	3.7%	3.1%	3.1%
New Brunswick	0	0	0	0	9	13	5	3	14	16	14.3%	4	7	10	9	2.6%	2.6%	1.6%	1.6%
Newfoundland	0	0	0	0	3	3	4	5	7	8	14.3%	3	3	4	5	1.3%	1.3%	0.8%	0.8%
Nova Scotia	0	0	10	13	5	5	6	6	21	24	14.3%	10	13	11	11	3.9%	3.9%	2.1%	2.1%
Ontario	174	201	23	33	0	0	26	26	223	260	16.6%	174	201	49	59	41.5%	42.2%	41.6%	41.8%
Prince Edward Island	0	0	0	0	0	0	2	3	2	3	50.0%	0	0	2	3	0.4%	0.5%	0.3%	0.3%
Quebec	31	33	13	13	0	0	4	4	48	50	4.2%	31	33	17	17	8.9%	8.1%	22.4%	22.1%
Saskatchewan	0	0	12	13	6	5	3	3	21	21	0.0%	12	13	9	8	3.9%	3.4%	2.3%	2.3%
TOTALS	340	390	88	111	28	31	81	84	537.0	616.0	15%	350	408	187	208				

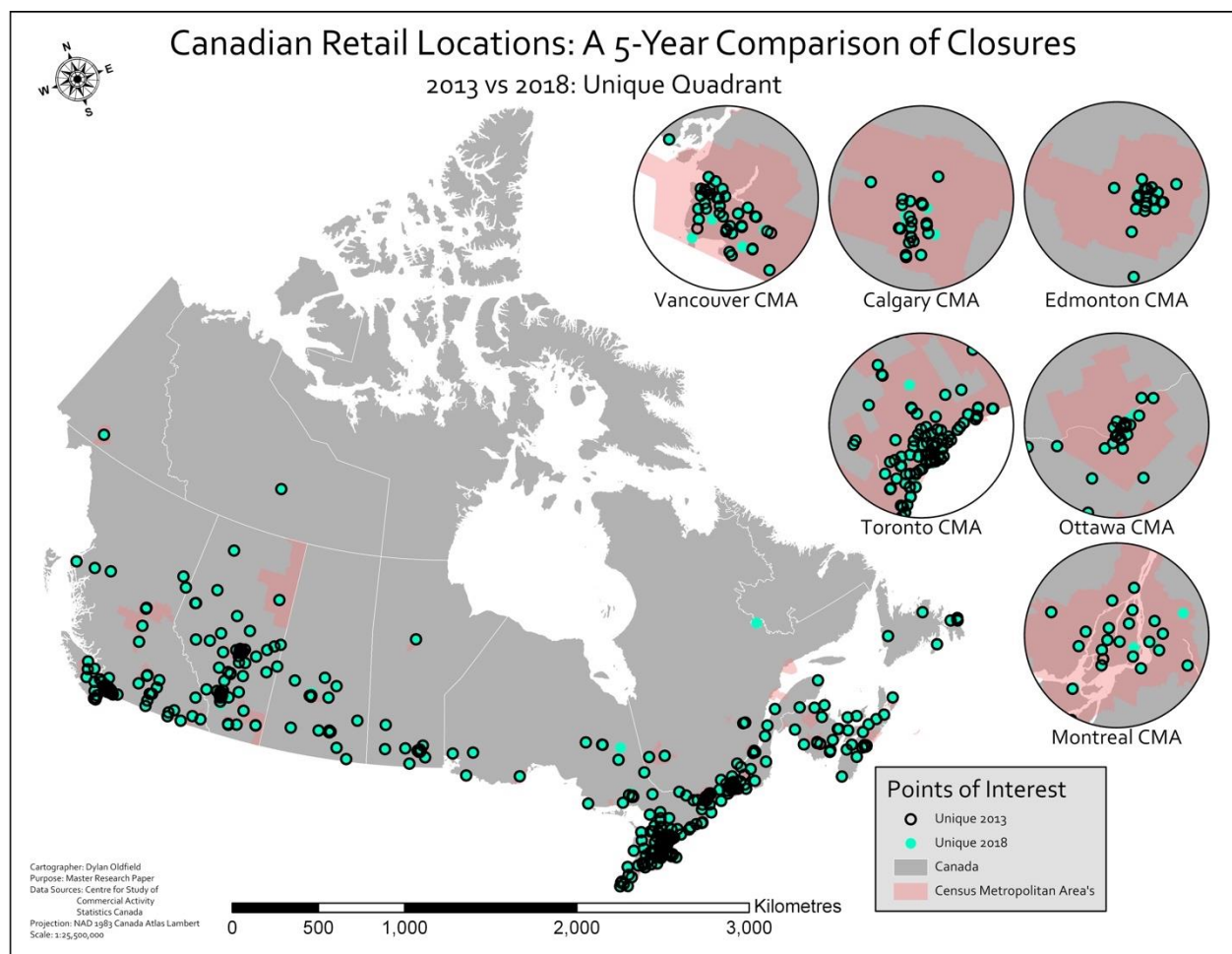


Figure 28. Map of Unique Quadrant BM Stores of 2013 to 2018

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