

[November 16. 2005]

Consumer Trends- Presentation to International Council of Shopping Centres



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➤ Increase in Sustainable Developments

- New urban design based on sustainable principles
- Increased density and mixed uses
- Retail and services accessible by foot or public transit
- Consumers encouraged to reduce use of vehicles for shopping



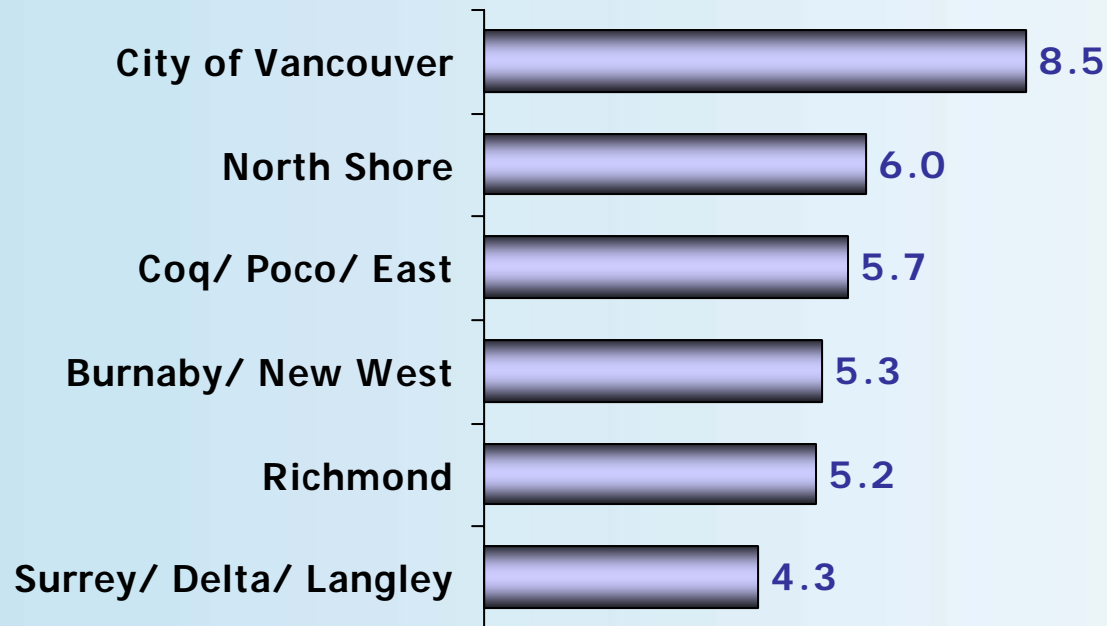
➤ Average Number of Visits Per Month





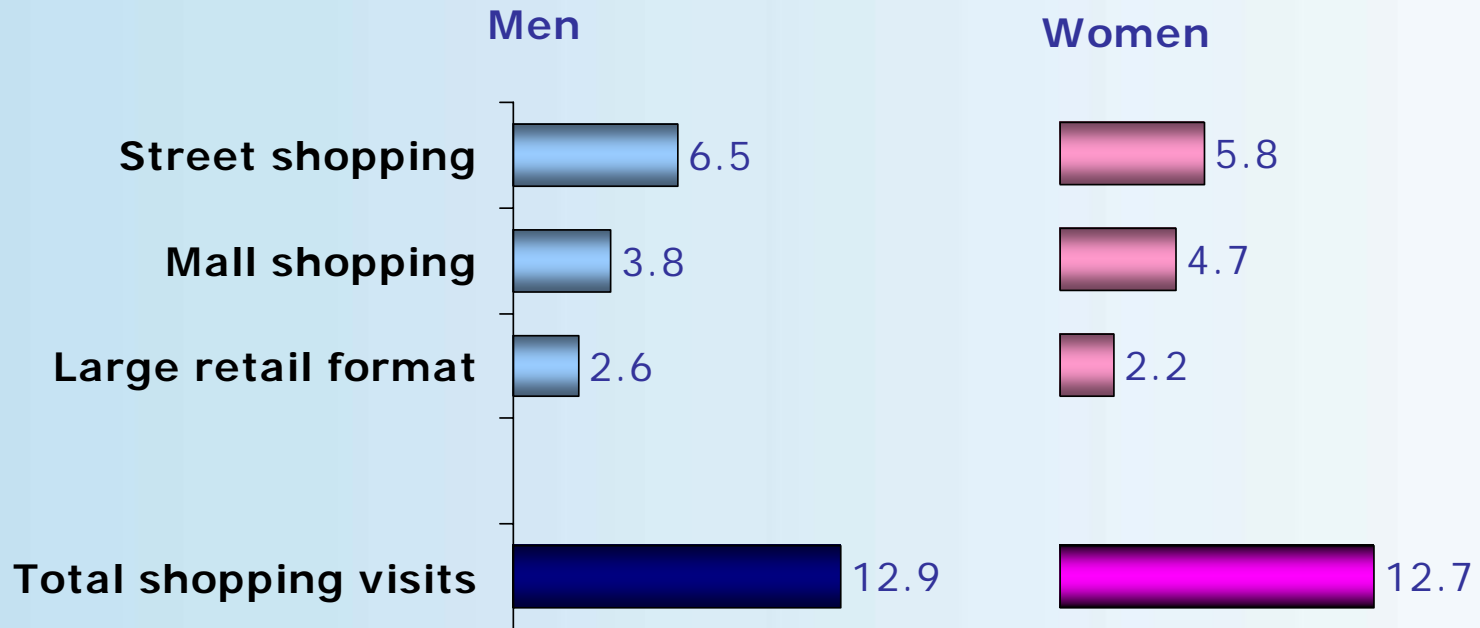
➤ Who is Street Shopping

(Average # of Visits/ Month)



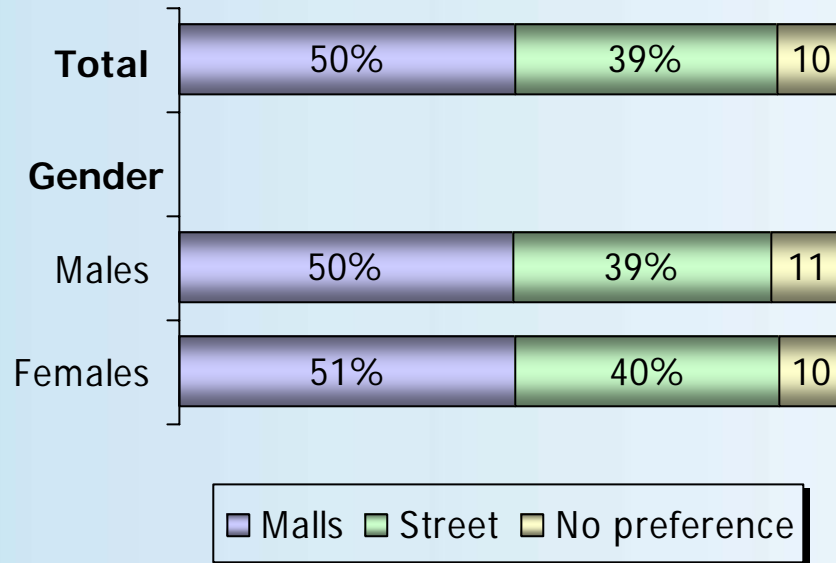


➤ Average Monthly Shopping Visits by Men vs. Women



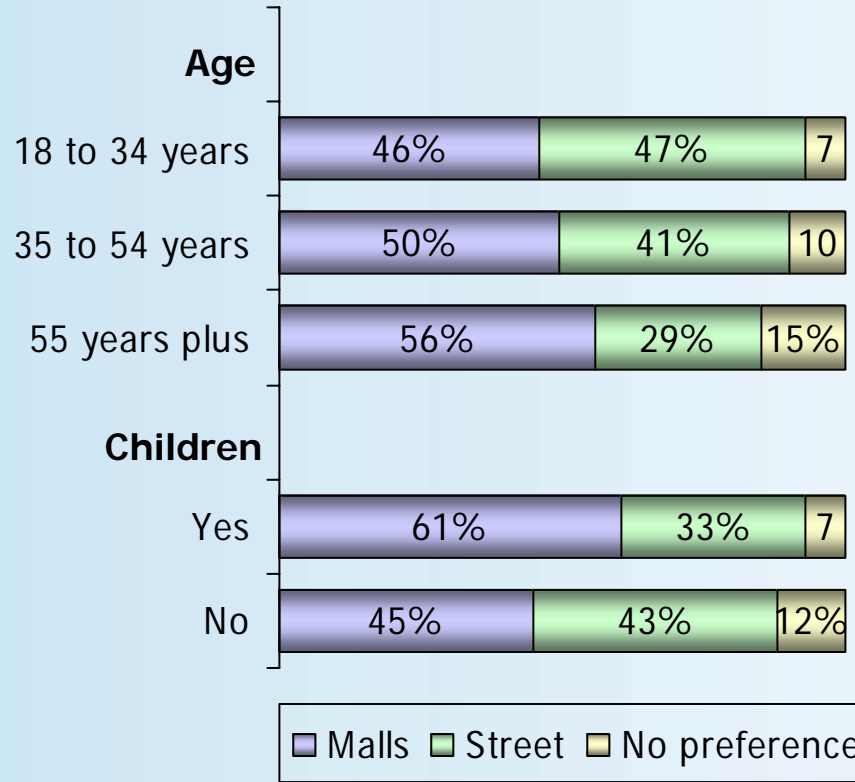


➤ Prefer Street Shopping or Enclosed Malls





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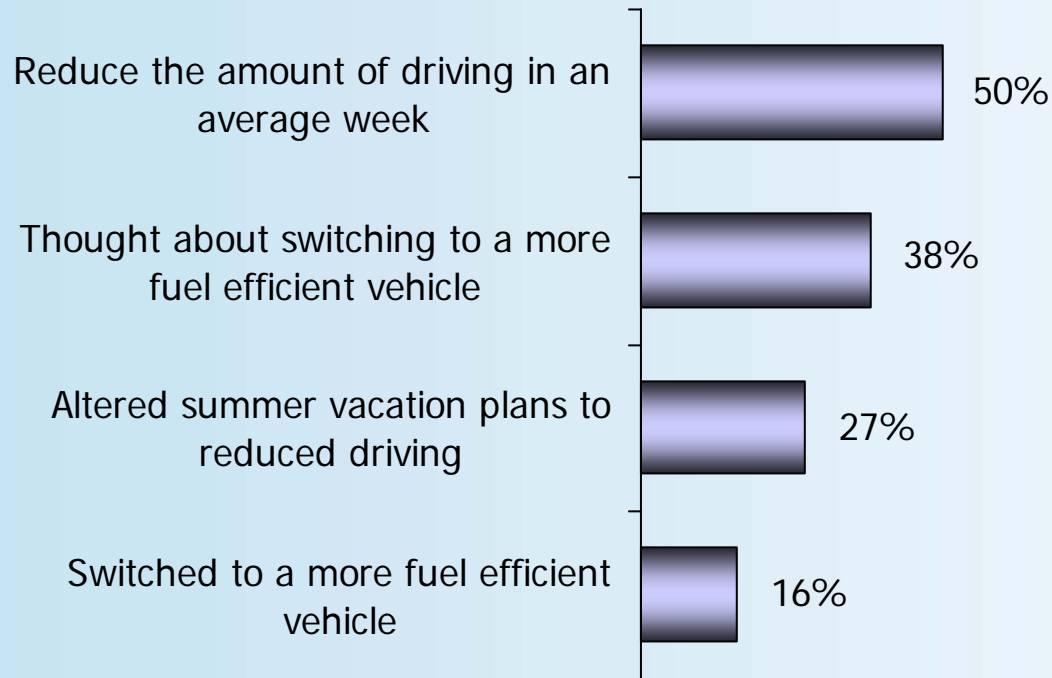
➤ Consumers Reducing Usage of Vehicles

- Increase in gas prices
- Increase in traffic congestion
- Expansion of public transit and community pass programs
- Concern about environment



➤ Impact of Gas Prices on Habits

Have you done any of the following in the last few months due to the increased cost of gasoline and diesel:



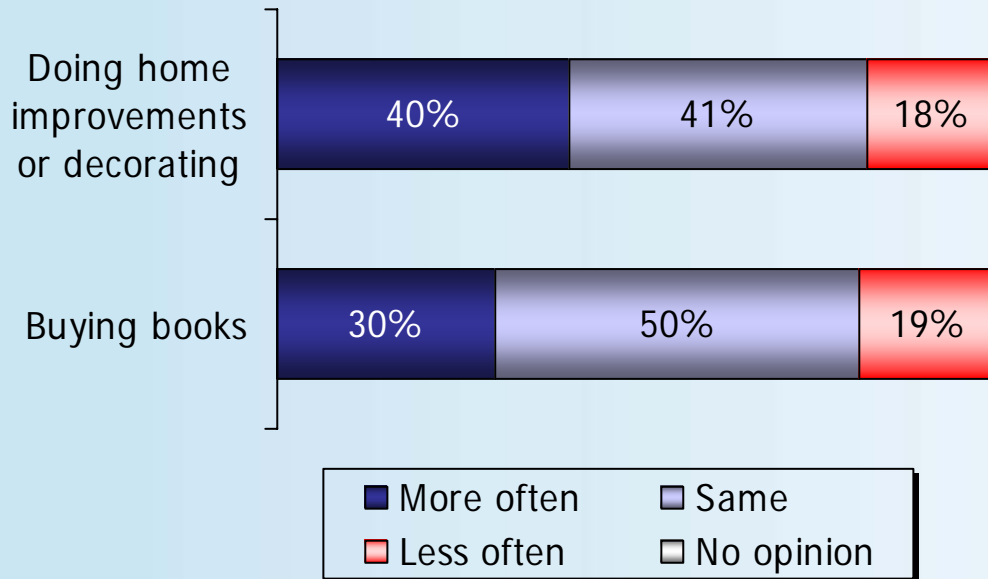


➤ Community Activism High

- Impacting type of retail development
- Distrust in developers, planners and politicians
- Evident in cities and communities throughout BC

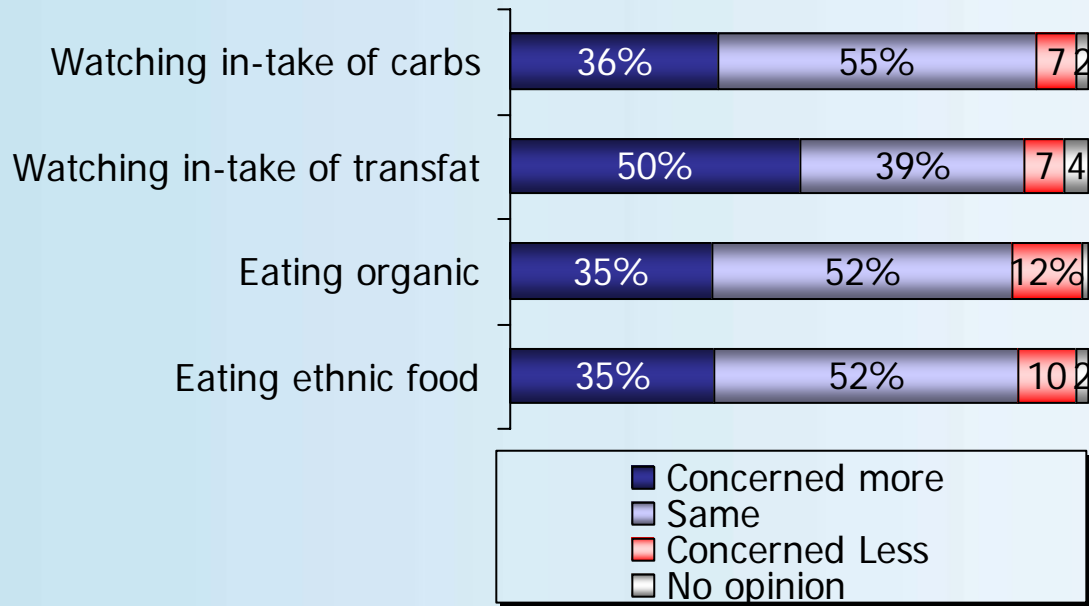


➤ “Taking Care of Me”



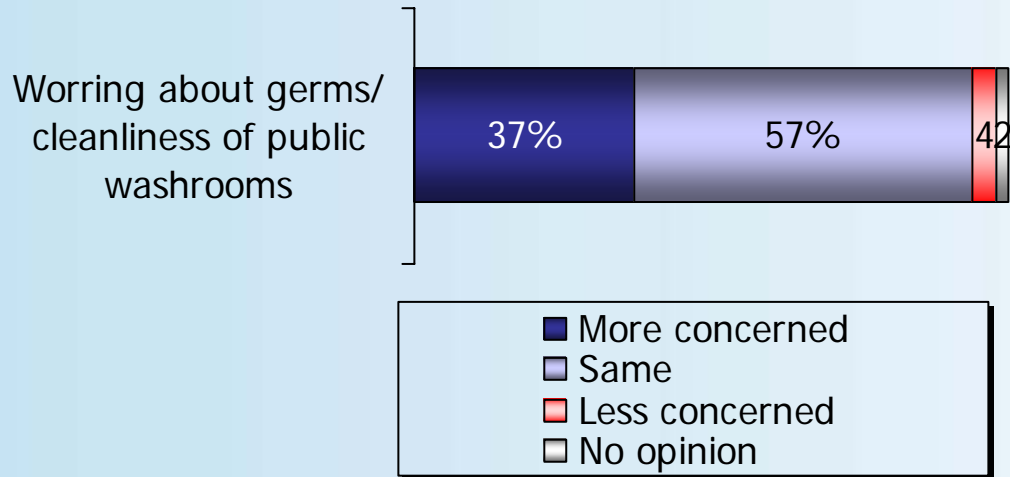


Changes in Diet/Health Concerns Compared to 5 Years Ago





Changes in Health Concerns Compared to 5 Years Ago-cont'd



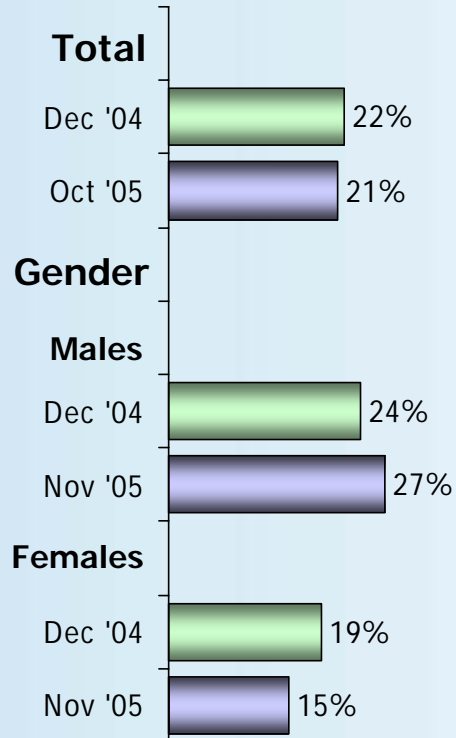


➤ Internet Shopping Overstated

- On-line purchases still small proportion of retail sales
- Use Internet for research, not to buy in most categories

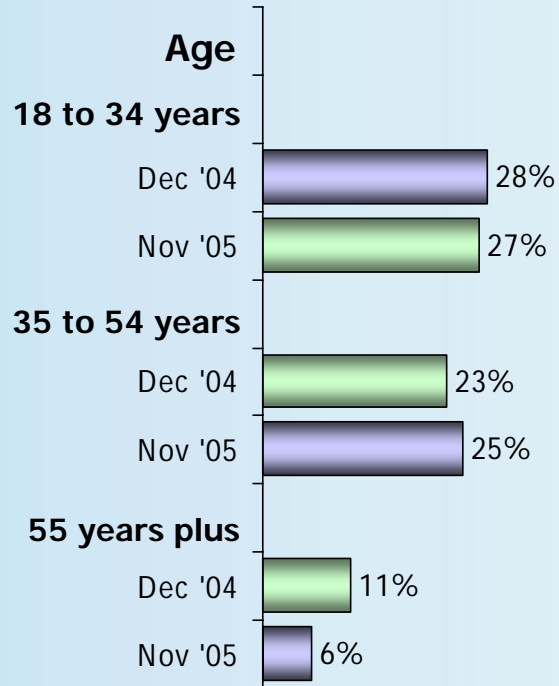


➤ Percentage On-Line Shopping





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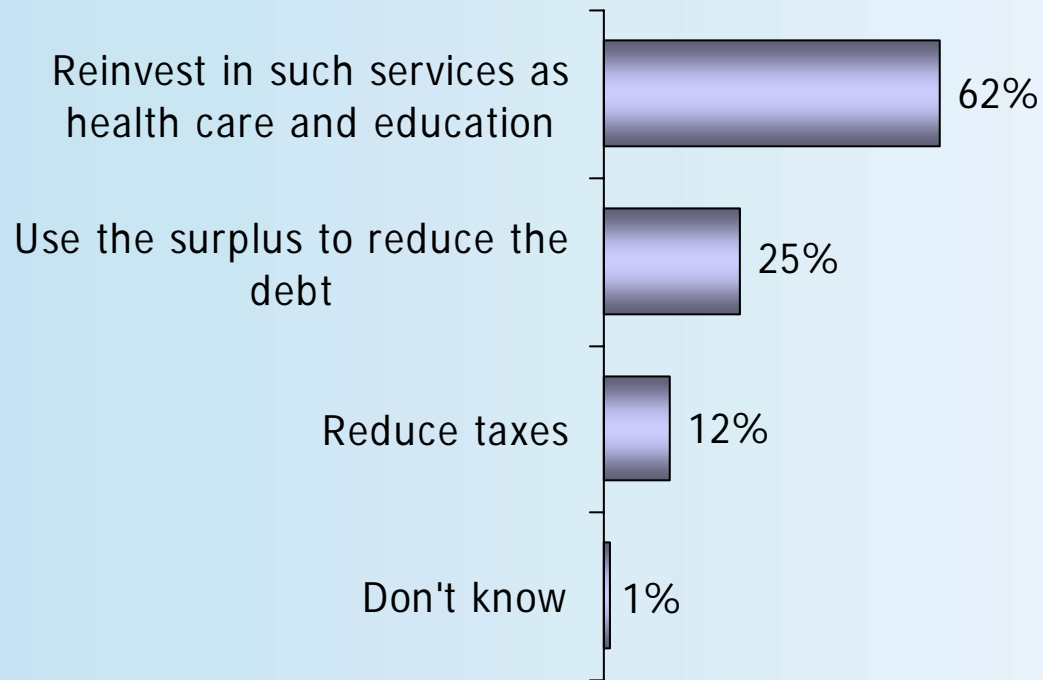


➤ Political Mood/Trends

- Voter ADD
- Less concerned about tax reduction



► Use of Budget Surpluses





Thanks. Any questions?



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