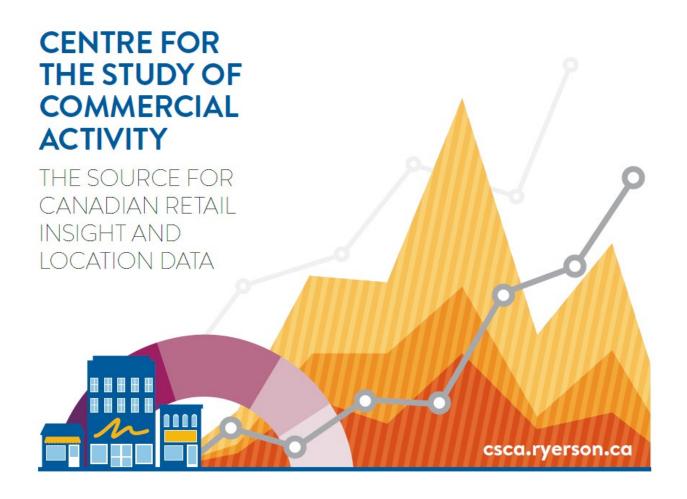
# Annual Report 2021-2022



Prepared by: **Tony Hernandez** Director / Eaton Chair in Retail

> **Cari Bish** CSCA Manager





#### **BACKGROUND**

The CSCA research model was developed by Dr. Ken Jones in Spring 1991 within a business plan that was submitted to the Vice President, Academic. That plan laid out some fundamental principles of the Centre and established a set of research milestones and deliverables that were attained over the first year of operation. The fundamental mission of the CSCA has remained largely unchanged over the years, that is, to provide decision support to those organizations with interest in the Canadian retail and service economy. Dr. Jones led the CSCA from its foundation in 1992 through to 2005, at which time Dr. Hernandez (Research Associate with the CSCA since 1999) was appointed Director of the Centre. Figure 1 provides the summary mission statement, aims and vision for the CSCA – as defined as part of the CSCA's Team Charter.

Figure 1. CSCA Mission Statement, Aims and Vision

# **MISSION**

To enhance the competitiveness of the consumer service sector for the benefit of Canadian society.

## The Centre aims to:

- Generate and share research insights that further knowledge and understanding of the industry
- Create and maintain high quality location-based data and information to support public and private sector decisionmaking activities
- Develop innovative geospatial analytical methods and approaches to leverage location-based data
- Support the education, training and professional development of highly qualified personnel to serve the needs of the location analytics industry
- Enable research-driven connections amongst public and private sector stakeholders to address critical issues related to the industry

# VISION

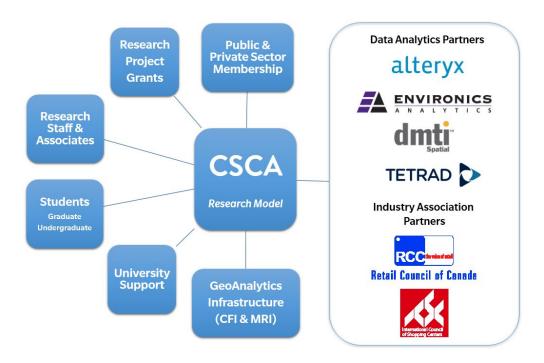
Innovatively applying location-based research, education and outreach within the consumer service sector

## The CSCA Partnership Model

The Centre was established on a partnership model (see Figure 2). The Centre links the research activities of a university-based research unit with the needs of a broad set of private and public sector supporters. The concept is to build, maintain and develop extensive databases that enable Centre researchers to develop a detailed understanding of the changing nature of the supply-side of the Canadian consumer service sector. The research activity of the CSCA has been supported by membership support, grants from provincial and national funding agencies and university support. The underlying business model is based on a mutual fund approach whereby the Centre seeks and benefits from the support of a range of stakeholders, and in turn, members of the CSCA benefit from the Centre's insights and data. Promoting partnerships between the public and private sectors has been a key component of the success of the Centre.

Since 1992, the CSCA has generated more than \$11 million in external funds, published and disseminated over 215 research monographs, contributed over 300 qualified personnel to the economy with expertise in business geospatial analytics, and formed partnerships with over 150 private and public sector organizations, written the Ontario Retail Sector Strategy, successfully competed for and renewed a national NSERC/SSHRC Research Chair (for the maximum of two five year terms), been directly awarded two (and co-applicant on a third successful) Canadian Foundation for Innovations grants (with matching Ontario Ministry of Research and Innovation / Ontario Research Development Challenge Fund), has been a major player in the GEOIDE Network of Centres of Excellence and has received continual SSHRC grants to present day.

Figure 2. CSCA Research Partnership Model



#### KNOWLEDGE DISSEMINATION - SCHOLARLY AND APPLIED RESEARCH

The research output of the CSCA and knowledge dissemination is divided into two areas: data and research publications/presentations. In terms of data, the CSCA releases three major datasets each year: a quarterly release of the *Major Retail Chain Database*, a quarterly release of the *Major Food Services Chain Database* and a quarterly release of the *National Shopping Centre Database*. We are releasing 12 major data outputs annually.

Maintaining, updating and managing these data sets is both a long-standing and major undertaking for the Centre and a core element of our membership support model. The other area of research output for the CSCA is the publication of our research insights and reports that are in constant demand by the members of the Centre. These reports tend to be current and applied in nature and are available for download from our website (<a href="csca.ryerson.ca">csca.ryerson.ca</a>). As presented in Table 1, the CSCA has maintained its data and publication schedule. A complete listing of these publications is listed in Appendix I. In addition to these publications, the work of CSCA researchers is also published in various academic journals or in book form. Table 2 provides a list of these other outputs.

Table 1. CSCA Data Releases and Research Reports: 2021-2022

	Research Reports	Data Releases	Total
2021	4	12	16
2022*	4(8)	6(6)	10)14)
Total	8(8)	18(6)	26(14)

Table 2. CSCA-based Academic Output: 2021-2022

	Book/ Chapters	Journal Articles	Technical Papers	Proceedings Presentations	Total
2021	-	1	4	3	8
2022*	(1)	2(2)	4(2)	9	15(5)
Total	-(1)	3(2)	8(2)	12	23(5)

<sup>\*</sup> includes in-progress reports in brackets. Due to COVID, a number of 2021 publications were moved to a 2022 publication date.

Centre researchers are also asked by various university departments, academic, private and public sector organizations to present our research findings on various aspects of the retail economy in Canada (see Table 2). This outreach is an important part of our research program and profile within the industry. It allows the CSCA to engage with the broader community – an important aspect of the work and responsibility of a university research unit. Dr. Hernandez has been invited to give numerous professional presentations to a variety of audiences that included private businesses, government agencies and departments and business associations.

The CSCA also partners on a number of projects with Toronto Metropolitan University Faculty, including, for example, working with Dr. Lu Wang (Faculty of Arts) on an RBC Diversity Grant focusing on South Asian and Chinese grocery retail behaviours and healthy eating; Dr. Shuguang Wang (Faculty of Arts) on ethnic retail and shopping centres; Dr. Jenna Jacobson and Dr. Frances Gunn (TRSM) on the retail sector response to COVID-19; Dr. Joseph Aversa and Dr. Ravi Vatrapu (TRSM) and on big data analytics in Canada and cross-border big data issues; Dr. Cleave (Faculty of Arts) and Dr. Joseph Aversa and Dr. Jenna Jacobson (TRSM) on the impact of the legalization and emerging geography of cannabis retail in Canada — with an emphasis on the Ontario marketplace; Dr. Joseph Aversa (TRSM) on contemporary corporate location decision-making in the Canadian retail and service sectors; and, Dr. Tirtiroglu (TRSM) on the Canadian commercial real estate investment market.

The CSCA has been able to establish both a national and increasingly international reputation as a leader in retail research and business geospatial analytics. In effect, it has established a 'brand' and has provided the University with a profile in academia, business, government and the media. CSCA research is often referenced in major Canadian newspapers and trade magazines.

### **Selected Committee Outreach:**

- Member, Real Property Association of Canada (RealPAC) Research Advisory Committee (2011-)
- Member, Toronto Board of Trade, Trade and Commercialization Committee (2019-)
- Member (& past-Chair), International Council of Shopping Centres (ICSC) Canadian Retail Group (1999-)
- Treasurer (and past-President), Canadian Retail Education Association (2021-)
- Board Member (past-Chair) of the Business Geography Speciality Group of the American Association of Geographers (2001-)
- Board Member of Applied Geography Conference Board (2004-)

# TRAINING HIGHLY QUALIFIED PERSONNEL

CSCA is closely integrated into the academic and teaching activities of the University. The Centre continues as a partner in the Masters of Spatial Analysis (MSA) program. The MSA graduate program was originally implemented in 2000 as a joint program with the Department of Geography (Ryerson University), the Department of Geography (University of Toronto) and the CSCA (Ryerson University). CSCA research staff and infrastructure continue to play a significant role in the teaching and support of graduate studies and research in the areas of business applications of various spatial technologies. In 2007/2008, the MSA program underwent its first OCGS seven-year review. The OCGS-appointed external reviewers noted that the CSCA is a 'world-class' research facility and is at the lead edge in the area of business geomatics. Following the 2007/2008 review, the University of Toronto withdrew from the program. The MSA program underwent a second review in 2019, and the CSCA provided the external review team with insight into the role of the CSCA and its staff (see Table 3) in supporting graduate students within the program. Researchers at the CSCA have undertaken and supported MSA graduate teaching, provided data for graduate research and directly supervised a large number of graduate thesis and major research papers (Dr. Hernandez has supervised the research of over 50 MSA graduates).

Since 1992, the Centre has hired/funded over 300 students in various capacities. The CSCA employed and/or supported 17 graduate students and 21 undergraduate students between 2021 and 2022 (see Table 4). These include three current Ph.D. students and one that has completed his Ph.D. and joined the CSCA in a Post-Doctoral position. This support represents a considerable contribution to the advancement of Highly Qualified Personnel, a benchmark that is used by national and provincial granting councils and agencies to evaluate the success of various research grants.

## Table 3. CSCA Research Staff, 2021-2022

Director: Dr. Tony Hernandez

Manager: Cari Bish

Distinguished Researcher: Dr. Maurice Yeates (Dean Emeritus)

Data Analysts: Jennifer Nhieu

**Eric Lawton** 

Ph.D. Researcher: Christopher Daniel

Sedat Ogeturk
Muhammad Alum

Industry Advisors: Dr. Tony Lea, VP, Research, Environics Analytics

Dr. Chuck Chakrapani, EVP, Leger Marketing

Table 4. Student Research Support (HQP Training) 2021-2022

	<b>Graduate Student</b>	Undergraduates	Total
2021	9	10	19
2022	8	11	19
Totals	17	21	38

#### RESEARCH FUNDING

CSCA is supported primarily with funds from four sources. These are:

- Research Grants
- The Eaton Chair in Retail
- Collaborative Research Partnerships Membership Support
- Ryerson Base Budget (salary off-set)

The Centre has been successful in obtaining major research grants from the national granting councils, the province and federal government and various associations. It should be stressed that the key to obtaining these grants has been our ability to demonstrate commitment from the industry to our research agenda (either in terms of cash contributions, in-kind support, or more generally, advocacy and support of our research mandate within the industry).

## **Research Grants**

2022	MITACS – Shopping Centre Modeling (Dr. Hernandez, Co-PI)
2022	MITACS – Spatial Smartphone Data (Dr. Hernandez, Co-PI)
2021	TRSM Post-Doctoral Award (Dr. Hernandez, PI)
2021	TRSM Research Development Grant Cross-Border Shopping: The Effect of COVID-19 on Border Town Retail (Dr. Hernandez, Co-App, with Dr. Joseph Aversa and Dr. Ravi Vatrapu)

2018-2023 Social Sciences and Humanities Research Council (SSHRC)

Transformation of Shopping Centre in Canada

(Dr. Hernandez, PI)

2019-2021 RBC Diversity Research

Ethnic Grocery Retailing and Healthy Food Provision in Marginalized

Ethno-Cultural Neighbourhoods in Toronto

(Dr. Hernandez, Co-App)

#### The Eaton Chair in Retail

The Eaton Chair in Retailing is a \$2.1 million endowed Chair that was established at Ryerson University in 1994 to help celebrate the 125<sup>th</sup> anniversary of the T. Eaton Company. In total, 50 organizations and individuals, led by the Eaton Foundation, supported the initiative. In 1995, two joint chairholders were confirmed: Dr. Ken Jones, Centre for the Study of Commercial Activity, Ryerson University and Dr. Michael Pearce, Richard Ivey School of Business, University of Western Ontario. The fundamental objective of the Chair was to foster retail research excellence in Canada through the dissemination of results-oriented research and information that would profile the strategic significance of the Canadian retail economy. The Chair's activities were also directed toward developing research partnerships that would help strengthen the competitive position of retailers in Canada. In 1996, the activities of the Chair were enhanced with the establishment by the Natural Science and Engineering Research Council (NSERC) and the Social Sciences and Humanities Research Council (SSHRC) of a Chair in the Management of Technological Change in Retailing. Two of the principal outcomes of the Eaton/SSHRC/NSERC Chair's research program were, at that time, the creation of the Eaton Chair website and the organization of the International IBM/Eaton Chair Retail Thought Leaders Conference.

In 2001, the Eaton/SSHRC/NSERC Chair was renewed to 2006, and Dr. Ken Jones was appointed as the Eaton Chair and Dr. Hernandez appointed as Associate Chair. The SSHRC/NSERC component of the Chair finished in 2006 having been in place for the maximum allowable tenyear period. In 2006, Dr. Hernandez was appointed as the Eaton Chair in Retail at Ryerson University. Most recently, the University renewed Dr. Hernandez as the Eaton Chair in Retail through to the end of 2022.

In June 2022, a search committee was formed at TRSM for the appointment of the Eaton Chair (2023-).

#### COLLABORATIVE RESEARCH PARTNERSHIPS - MEMBERSHIP SUPPORT

The Centre has been able to maintain its support from the retail sector through continuing support from various organizations with interest in the Canadian consumer service sector. The dynamics of the membership require constant attention to maintain support and research currency. With the vast majority of CSCA members being drawn from the private sector, the Centre is subject to economic cycles and competitive pressures in the industry. Member management and administration are undertaken on a day-to-day basis by the CSCA Manager, Cari Bish. The CSCA Director and CSCA Manager work in tandem on maintaining and attracting members to the Centre, and while this represents a significant time commitment, it is a defining element of the CSCA member support model.

## **CSCA Membership Support Model**

The CSCA membership support model has been adapted over the years to reflect the ways in which our constituents want to receive research and access to data. Currently, the CSCA provides an interactive website — www.csca.ryerson.ca where our members can sign up for an online account, and interested individuals can become subscribers to receive our marketing and outreach efforts by email to keep track of our data and research releases. (see Appendix I (a) and (b) for a selected list of current members, website outreach and our member transactions with respect to data and research downloads).

The current CSCA membership support model is two-tiered. The base membership provides access to all our publications and insights for free download through the CSCA website. Data members are charged a fee for data and custom data services. The need to continually evolve our member model is reflected in the priority areas for the next year (see the section on 'CSCA Transition 2021-2022).

The CSCA has also established a number of key industry partnerships with leading companies in the geoanalytics industry, namely, Environics Analytics, Alteryx, DMTI and Tetrad. The CSCA has also established partnerships with two of the largest retail-related associations that operate in Canada, namely: the Retail Council of Canada; and the International Council of Shopping Centers (ICSC). Collectively, these partnerships serve to strengthen the CSCA's research reputation and exposure within the Canadian consumer service sector. The partners have provided substantial in-kind support through access to their data, software and services (exceeding \$250,000 of commercial value). It should be noted that this is support in terms of access to software, data and services that allow the CSCA to undertake the research it does.

## Appendix. I CSCA Data Release and Research Reports 2021-2022

## **Major Data Releases**

- Quarterly Release of the Major Retail Chain Database (four releases each year)
- Quarterly Release of the Major Food Services Database (four releases each year)
- Annual Release of National Shopping Centre Database (four releases each year)

## **Research Reports**

Hernandez, T. and Nhieu, J. CSCA Retail 100, Centre for the Study of Commercial Activity, Ryerson University, Toronto, Canada (forthcoming)

Hernandez, T., Nhieu, J. and Azmy, A. The Evolution of the Shopping Mall: 1996-2022, Centre for the Study of Commercial Activity, Ryerson University, Toronto, Canada (forthcoming)

Nhieu, J. and Hernandez, T. Value Village: Leveraging the Circular Economy. Centre for the Study of Commercial Activity, Ryerson University, Toronto, Canada (forthcoming)

Ogeturk, S., Hernandez, T., Yeates, M. and D. Tirtiroglu. Canadian REITs and Retail: Positioning for Future Growth? Centre for the Study of Commercial Activity, Ryerson University, Toronto, Canada (forthcoming)

Lawton, E. and Hernandez, T. The Impact of COVID on Home Improvement Retailing in Canada, Centre for the Study of Commercial Activity, Ryerson University, Toronto, Canada (forthcoming)

Hernandez, T., Lawton, E. and Aversa, J. What's in a Trade Area, 2<sup>nd</sup> Edition, CSCA Monograph, Centre for the Study of Commercial Activity, Ryerson University, Toronto, Canada (forthcoming)

Hernandez, T., Nhieu, J and Bish, C. The Department Store Aftermath: The Real Estate Legacy of Sears Canada and Target Canada, CSCA Research Insight, Centre for the Study of Commercial Activity, Ryerson University, Toronto, Canada (forthcoming)

Hernandez, T., Nhieu, J. and Bender, S. Opening and Closures of Major Retail Chains in Canada: 2013-2021. CSCA Research Insight, Centre for the Study of Commercial Activity, Ryerson University, Toronto, Canada (forthcoming)

Nhieu, J, and Hernandez, T. IKEA Extends Market Reach Through Omnichannel Innovation. CSCA Research Insight, Centre for the Study of Commercial Activity, Ryerson University, Toronto, Canada, 2022

Yeates, M. and Hernandez, T., Retail is Distribution: Trade, Gateways and Warehousing. CSCA Research Insight, Centre for the Study of Commercial Activity, Ryerson University, Toronto, Canada, 2022

Nhieu, J, and Hernandez, T. Starbucks in Canada: Navigating the Pandemic, CSCA Research Insight, Centre for the Study of Commercial Activity, Ryerson University, Toronto, Canada, 2022.

Lawton, E. and Hernandez, T. Dollar Store Dominance: The Market Reach of Dollarama, CSCA Research Insight, Centre for the Study of Commercial Activity, Ryerson University, Toronto, Canada, 2022

Yeates, M. and Hernandez, T. CSCA Retail 100, Centre for the Study of Commercial Activity, Ryerson University, Toronto, Canada, 2021.

Yeates, M. and Hernandez, T. Retail Concentration in Canada and the Competition Bureau, CSCA Research Insight, Centre for the Study of Commercial Activity, Ryerson University, Toronto, Canada, 2021

Hernandez, T. and Sivaskandarajah, S. Market Threshold of Major Retail Chains in Canada: 2014-2019, CSCA Research Insight, Centre for the Study of Commercial Activity, Ryerson University, Toronto, Canada, 2021

Yeates, M. and Hernandez, T. Limited-Service Eating Places in Canada: a Locational Sketch, CSCA Research Insight, Centre for the Study of Commercial Activity, Ryerson University, Toronto, Canada, 2021

## Appendix II. CSCA Academic-Output: 2021-2022

## **Book Chapters**

Daniel, C. and Hernandez, T (in press) Impact of E-Commerce in Kickert, C. and Talen, E (eds.) <u>Streetlife: The Future of Urban Retail</u>. University of Toronto Press.

Aversa, J., Hernandez, T. and Doherty, S. (2020) Spatial Big Data and Business Location Decision Making: Opportunities and Challenges, in Vaz, E. (ed.) <u>Regional Intelligence: Spatial Analysis and Anthropogenic Regional Challenges in the Digital Age: Advances in Spatial Science Series, Springer.</u>

## **Papers in Refereed Journals**

Aversa, J., Cleave, E., Jacobson, J., Hernandez, T., Dizonno, S. and Macdonald, M. (submitted) Rollin' papers: Newspaper coverage of cannabis legalization in Canada, <u>Newspaper Research Journal</u>.

O'Reilly, N., Hernandez, T., Seguin, B., Warwick, L. and Hasani, T. (accepted) Barriers to Youth Sport Participation in Dense Urban Centres, <u>International Journal of Sport Management and Marketing</u>.

Jacobson, J., Gunn, F. and Hernandez, T. Stepping up as an essential service: Grocery retailing and the COVID-19 pandemic in Canada, <u>The International Review of Retail</u>, <u>Distribution and Consumer Research</u>., 2022.

Aversa, J., Jacobson, J., Hernandez, T., Cleave, E., Macdonald, M. and Dizonno, S. The social media response to the rollout of legalized cannabis retail in Ontario, Canada, <u>Journal of Retailing and Consumer Services</u>, 61, 2021.

Aversa, J., Hernandez, T. and Doherty, S. Incorporating Big Data Within Retail Location Organizations: A Case Study Approach, <u>Journal of Retailing and Consumer Services</u>, 60, 2021.

## Abstracts and/or Papers Read:

Rudkowski, J., Gunn, F., Hernandez, T., Fares, O., Dagg, L., van Acquoij, L and Kirrane, T. (2022) Shopify' Enhancing Entrepreneurial Learning through Industry Partnership: the Shopify Challenge', 2022 Learning & Teaching Conference, Toronto Metropolitan University, May 19<sup>th</sup>

Hernandez, T., The Great Pivot: the reinvention of the spatial analysis of commercial activity, MSA Spatial Coffee Series, March 23<sup>rd</sup>, 2022.

# **Appendix II. CSCA Academic-Output: (continued)**

Hernandez, T. The Great Retail Reset and Commercial Real Estate, REIC Chapter Toronto, March 10<sup>th</sup>, 2022.

Gunn, F., Rudkowski, J., Hernandez, T., Fares. O.H., Kirrane, T., Dagg, L. and van Acquiij, V. Workshop: Shopify Store Hacker Challenge: Using International Charrettes in Retail Education, ACRA Conference, New Orleans, March 3<sup>rd,</sup> 2022.

Gunn, F., Hernandez, Fares, O.H. and Rudkowski, J. Retail Student Perceptions of Benefit and Challenges of Peer e-Mentoring Program, ACRA Conference, New Orleans, March 3<sup>rd</sup>, 2022.

Hernandez, T. and Lawton, E. The Rise of Dollar Stores in Canada, American Association of Geographers Conference, Virtual, February 25<sup>th</sup>- March 1<sup>st</sup>, 2022.

Aversa, J., Hernandez, T., Vatrapu, R. and Macdonald, M. Cross-border Shopping: the effect of COVID-19 on border town retail, American Association of Geographers Conference, Virtual, February 25<sup>th</sup>- March 1<sup>st</sup>, 2022.

Aversa, J., Cleave, E., Jacobson, J., Hernandez, T., Dizonno, S. and Macdonald, M. Newspaper Coverage of the Retail Cannabis Rollout in Canada: A Content Analysis, Applied Geography Conference, October 14<sup>th</sup> -16<sup>th</sup>, 2022.

Hernandez, T., Nhieu, J. and Bender, S. The impact of COVID on the location strategies of major retail chains in Canada, Applied Geography Conference, October 14<sup>th</sup> -16<sup>th</sup>, 2022.

Hernandez, T, Death of the Mall, American Association of Geographers Conference, Virtual, April 9th, 2021.

Aversa, J. and Hernandez, T., Mobile Location Data: a Geographic Response to Understanding Consumer Behavior, American Association of Geographers Conference, Virtual, April 9th, 2021.

Hernandez, T. How Has the Pandemic Accelerated Change in Canada's Retail Sector? C.D. Howe Special Policy Seminar: The Digitization of Canada's Economy, February 23<sup>rd</sup>, 2021.