

WOW

THE TOP RETAILERS IN ONTARIO

9th Edition | 2019



HOW?

Evaluation of the customer experience at **182 Ontario retailers** via an online survey with over 15,000 Ontarians.

WHO?

Each retailer was assessed by **400 of its recent** customers, 15 years of age or older.

WHEN?

Data collection took place from **September to October 2019**.

WEIGHTING?

Results were weighted according to **gender, age, region and language**, to be representative of each retailer's recent clientele.

The **WOW Index** is based on a store's performance on the **16 dimensions related to the in-store experience**, taking into account the importance of each dimension in the store's line of business. The WOW index is a number **between 0 and 100**.

PRODUCTS

- Product Quality
- Product Variety
- Drive and Innovation

PRICE

- Competitive Prices
- Promotional Activities

SERVICE

- Staff Courtesy
- Staff Competency
- Staff Attentiveness
- Efficiency at Checkout
- Importance Given to Customers

STORE

- Store Ambiance
- Store Layout
- Signage
- Information Displayed

CUSTOMIZATION

- Sense of Belonging
- Building Customer Loyalty

OTHER DIMENSIONS*

- Proximity of the Store
- Customer Recognition
- The Store's Curb Appeal **
- Integration of Contact Points**

* These dimensions are not included in the Wow Index calculation.

** New dimensions.

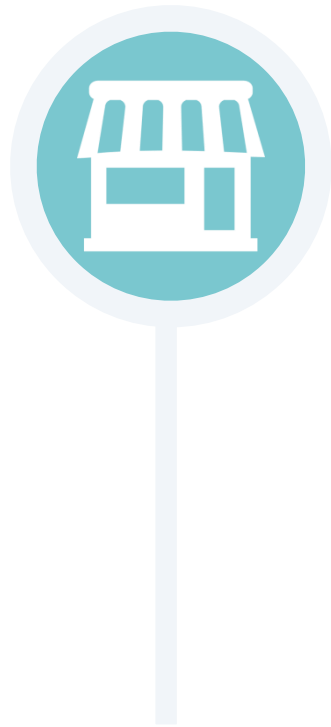


2019	RETAILERS	2019 WOW INDEX
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1	FARM BOY	77.7
2	YOUR INDEPENDENT GROCER	76.8
3	LONGO'S	70.0
4	SOBEYS	68.7
5	WHOLE FOODS	68.3
6	METRO	68.0
7	FORTINOS	67.4
8	NO FRILLS	66.9
9	FOODLAND	65.8
10	ZEHRS	63.8
11	INDEPENDENT CITY MARKET	61.8
12	REAL CANADIAN SUPERSTORE (RCSS)	61.0
13	FOOD BASICS	60.2
14	FRESHCO	59.2
15	WALMART FOOD	61.6
16	VALU-MART	56.8
17	NATIONS	55.0
18	LOBLAWS	54.7
19	T&T	48.6
20	RABBA FINE FOODS	41.0

ONTARIO





2019	RETAILERS	2019 WOW INDEX
1	PETRO CANADA SUPER STOP CONVENIENCE	62.8
2	SHELL SELECT	59.8
3	7-ELEVEN	54.3
4	CIRCLE K	50.6
5	QUIKIE	48.8
6	HASTY MARKET	38.9

2019	RETAILERS	2019 WOW INDEX
1	DOLLAR GIANT / DOLLAR TREE	55.5
2	DOLLARAMA	49.6

2019	RETAILERS	2019 WOW INDEX
1	PHARMASAVE	84.2
2	IDA / GUARDIAN	77.9
3	SHOPPERS DRUG MART	76.9
4	REXALL / PHARMA PLUS	71.5



2019	RETAILERS	2019 WOW INDEX
1	THE WINE SHOP	94.0
2	THE WINE RACK	81.8
3	LCBO	77.6
4	THE BEER STORE	73.7



Note: Shopper satisfaction with the Wine & Beer departments within Grocery is also captured in our Grocery report and reported by retailer.

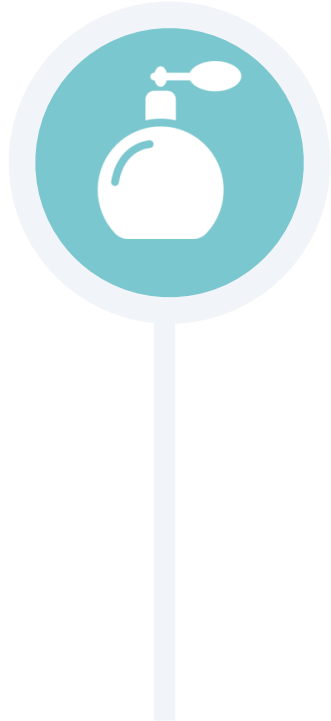


2019	RETAILERS	2019 WOW INDEX
1	LEE VALLEY TOOLS	92.2
2	LOWE'S	72.0
3	HOME HARDWARE	64.3
4	HOME DEPOT	63.3
5	CANADIAN TIRE	60.7
6	RONA	58.9

2019	RETAILERS	2019 WOW INDEX
1	BENJAMIN MOORE	81.8
2	DULUX PAINTS	80.8
3	SHERWIN-WILLIAMS	68.9

2019	RETAILERS	2019 WOW INDEX
1	COSTCO	71.3
2	SIMONS	70.2
3	HUDSON'S BAY / HBC	69.7
4	HOLT RENFREW	69.1
5	GIANT TIGER	67.9
6	MARSHALLS	65.9
7	WALMART	62.1
8	WINNERS	58.0
9	NORDSTROM	57.3
10	SAKS FIFTH AVENUE	48.5





2019	RETAILERS	2019 WOW INDEX
1	LUSH	91.1
2	THE FACE SHOP	89.6
3	BATH & BODY WORKS	85.6
4	MAC COSMETICS	85.4
5	THE BODY SHOP	84.6
6	YVES ROCHER	83.5
7	KIEHL'S	78.3
8	SEPHORA	77.9
9	NYX	72.9

Note: Results for the Beauty departments within other retailers is also available via our full report, including: Shoppers Drug Mart Beauty Boutique, Hudson’s Bay, Holt Renfrew, Nordstrom, Rexall and Walmart.

2019	RETAILERS	2019 WOW INDEX
1	CHARM DIAMOND CENTRES	83.0
2	BIRKS	81.6
3	TIFFANY & CO.	81.0
4	MICHAEL HILL	77.8
5	PANDORA	73.2
6	SWAROVSKI	70.2
7	MAPPINS	68.7
8	PEOPLES	68.0





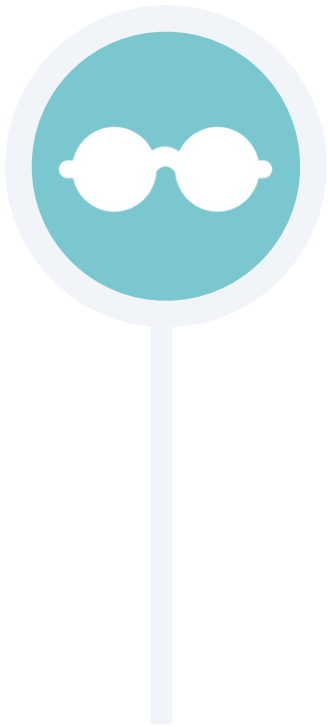
2019	RETAILERS	2019 WOW INDEX
1	SAJE NATURAL WELLNESS	96.2
2	DAVID'S TEA	94.4
3	M&M FOOD MARKET	93.6
4	NESPRESSO	91.7
5	PETSMART	83.6
6	PET VALU	80.4
7	BULK BARN	72.0

2019	RETAILERS	2019 WOW INDEX
1	LINDT MAÎTRE CHOCOLATIER	93.8
2	PURDYS CHOCOLATIER	87.5
3	CHOCOLATS FAVORIS	82.5
4	ROCKY MOUNTAIN CHOCOLATE FACTORY	75.0
5	LAURA SECORD	72.1
6	DAIRY QUEEN	59.9

2019	RETAILERS	2019 WOW INDEX
1	LEGO	86.2
2	CHAPTERS INDIGO	85.5
3	DISNEY STORE	82.1
4	MASTERMIND TOYS	79.2
5	TOYS "R" US	62.5

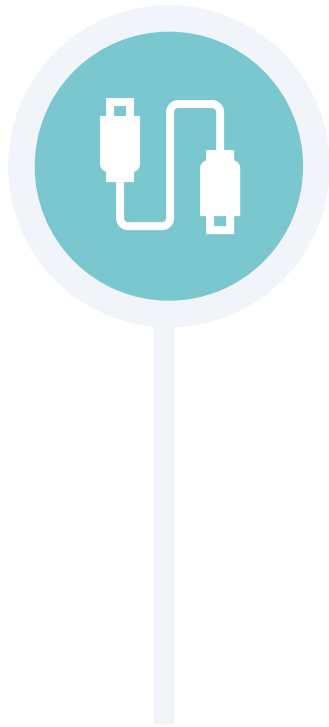


2019	RETAILERS	2019 WOW INDEX
1	SUNGLASS HUT	76.2
2	NEW LOOK EYEWEAR	75.7
3	COSTCO OPTICAL	73.6
4	LENSCRAFTERS	73.5
5	FYIDOCTORS	72.8
6	WALMART VISION CENTRE	70.1
7	HAKIM OPTICAL	67.5



HOUSEHOLD DECORATION, FURNITURE & ELECTRONICS

2019	RETAILERS	2019 WOW INDEX
1	MICROSOFT STORE	91.2
2	SAMSUNG	80.8
3	APPLE STORE	77.0
4	KITCHEN STUFF PLUS	74.6
5	STOKES	72.8
6	SLEEP COUNTRY CANADA	72.3
7	IKEA	71.5
8	EQ3	71.1
9	BEST BUY	66.8
9	STAPLES	66.5
11	THE SOURCE	66.1
12	HOMESENSE	65.3
13	LEON'S	58.3
14	URBAN BARN	57.6
15	THE BRICK	57.3
16	STRUCTUBE	54.8





2019	RETAILERS	2019 WOW INDEX
1	PENNINGTONS	91.0
2	ADDITION ELLE	81.1
3	LAURA	77.4
4	REITMANS	75.0
5	GARAGE	71.3
6	MELANIE LYNE	68.4
7	DYNAMITE	67.6
8	SUZY	61.8
9	ARDÈNE	60.2

2019	RETAILERS	2019 WOW INDEX
1	AERIE (BY AMERICAN EAGLE)	86.5
2	VICTORIA'S SECRET	81.5
3	LA SENZA	73.8
4	LA VIE EN ROSE	72.1

2019	RETAILERS	2019 WOW INDEX
1	INDOCHINO	89.9
2	TIP TOP TAILORS	79.4
3	HARRY ROSEN	78.4
4	MOORES	76.0
5	JACK&JONES	75.5



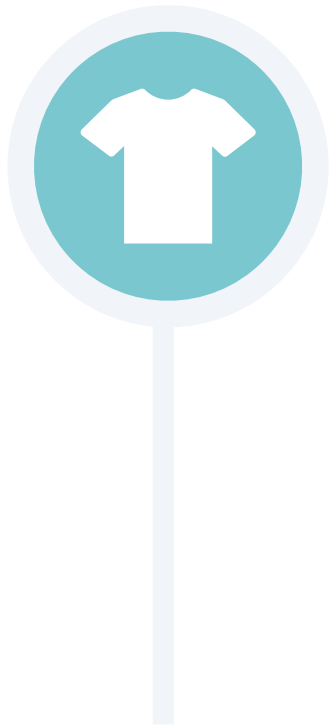
Note: Results also available for the men's department stores within Nordstrom, Holt Renfrew, and Saks Fifth Avenue in the full report.

2019

RETAILERS

2019
WOW INDEX

1	MARK'S WORK WEARHOUSE	79.3
2	BANANA REPUBLIC	75.4
3	UNIQLO	74.6
4	AMERICAN EAGLE OUTFITTERS	70.4
5	URBAN PLANET	69.8
6	FRANK AND OAK	68.8
7	ROOTS	67.9
8	CLUB MONACO	66.8
9	GAP	66.1
10	RW & CO	65.2
11	ANTHROPOLOGIE	63.4
12	OLD NAVY	62.3
13	ABERCROMBIE&FITCH	61.5
14	H&M	58.5
15	URBAN OUTFITTERS	56.7
16	J.CREW	56.2
17	ZARA	54.5
18	STITCHES	54.0
19	LE CHÂTEAU	52.5
20	TOP SHOP	51.1
21	FOREVER 21	48.2



2019

RETAILERS

2019 WOW INDEX

2019	RETAILERS	2019 WOW INDEX
1	MEC	86.1
2	SAIL	78.4
3	THE RUNNING ROOM	77.0
4	FOOT LOCKER	70.3
5	ATMOSPHERE	68.0
6	NATIONAL SPORTS	66.9
7	SOURCE FOR SPORTS	66.5
8	GOLF TOWN	66.0
9	SPORTING LIFE	64.8
10	SPORT CHEK	61.9

2019

RETAILERS

2019 WOW INDEX

2019	RETAILERS	2019 WOW INDEX
1	LULULEMON ATHLETICA	79.6
2	LOLÉ	73.6
3	UNDER ARMOUR	70.7
4	PUMA	68.7
5	CHAMPS SPORTS	67.4
6	REEBOK	66.3
7	ADIDAS	65.2
8	NIKE / NIKE FACTORY	61.5



2019

RETAILERS

2019
WOW INDEX

2019	RETAILERS	2019 WOW INDEX
1	NATURALIZER SHOES	77.6
2	COLE HAAN	75.3
3	GLOBO	71.4
4	STEVE MADDEN	70.3
5	WALKING ON A CLOUD	69.1
6	BROWNS	65.9
7	ALDO	65.5
8	CROCS	65.2
9	SPRING / CALL IT SPRING	64.3
10	SHOE COMPANY	63.6
11	ECCO	63.5
12	SOFTMOC	58.7





**IN-STORE
EXPERIENCE**

THIS YEAR'S
WINNERS

THE RETAILERS OFFERING CUSTOMERS THE BEST IN-STORE EXPERIENCE IN 2019*

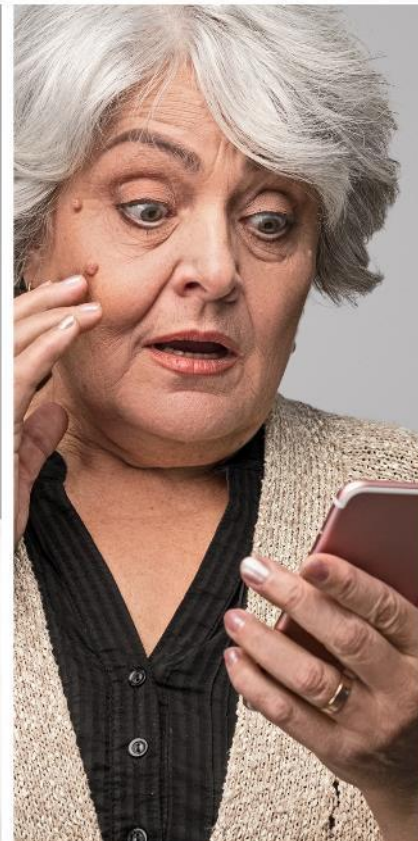


* Wow Index of 90 and over.

WOW

RANKING OF THE BEST ONLINE CUSTOMER EXPERIENCE
2019 Edition

D I G I T A L



HOW?

Online customer experience assessment of **112 Web sites or mobile apps** via a **Web survey** of more than 12,000 Canadians.

WHO?

Each site was evaluated by **400 of its visitors**, 15 years of age and over.

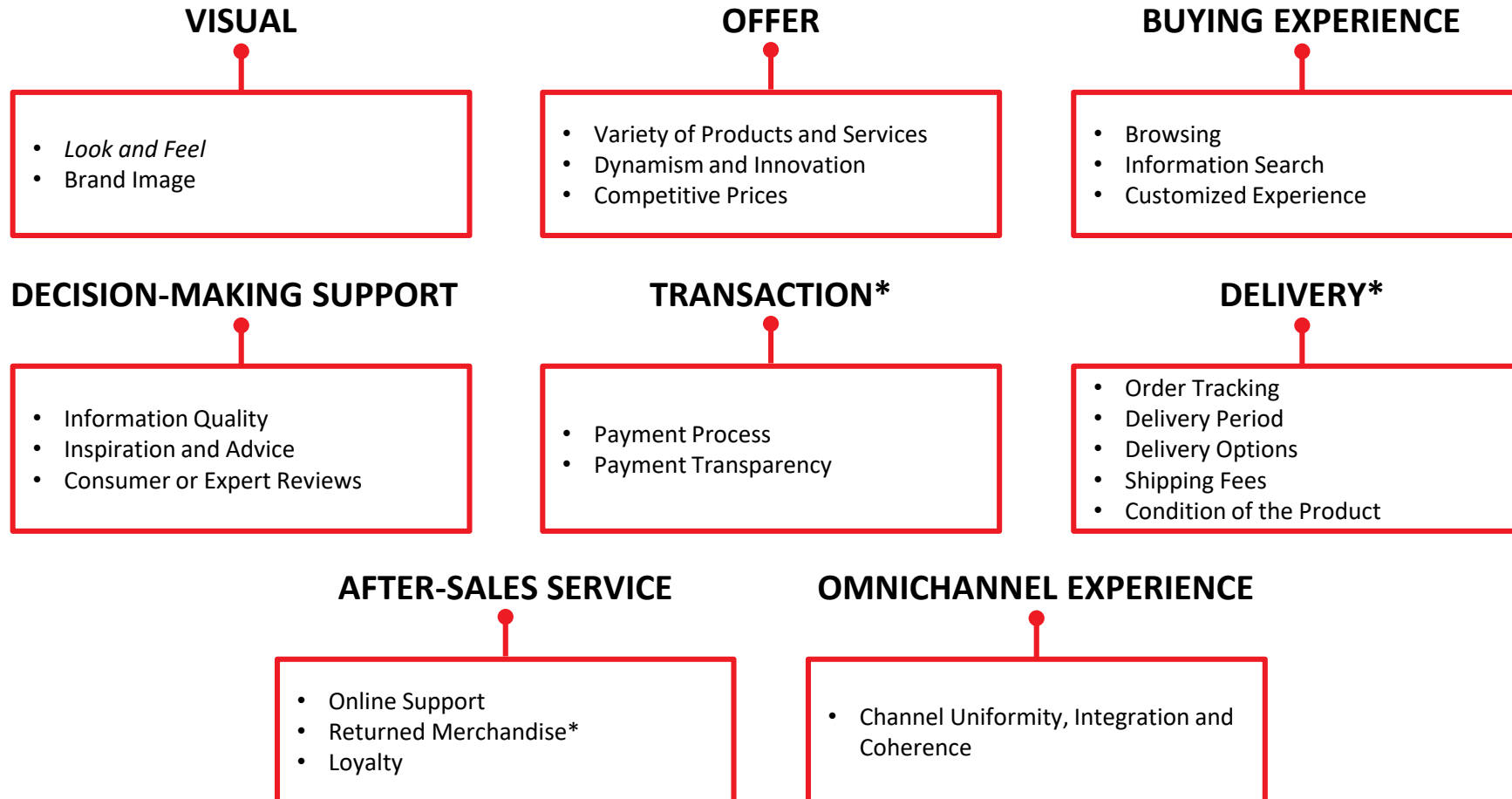
WHEN?

Data collection took place from **September to October 2019**.

WEIGHTING?

Results were weighted according to **gender, age, region and language** to be representative of visitors to each Web site or mobile app evaluated.

WOW's Digital Index is derived from the performance of a Web site or mobile app on **14 dimensions of the customer's non-transactional online experience** and takes into account their respective importance within this sector. The WOW Index ranges from **0 to 100**.



* These dimensions are not included in the Digital WOW index.



**ONLINE
EXPERIENCE:**

THIS YEAR'S
WINNERS

THE 9 BEST ONLINE EXPERIENCES IN 2019

#1

Simons

#2

Nespresso

#3

**Toronto-Dominion Bank
(TD)**

#4

SAQ

#5

Tangerine

#6

RBC Royal Bank

#7

Lee Valley

#8

Yves Rocher

#9

Amazon Canada

RANKING BY SECTOR

ALCOHOL

SAQ

LCBO

BEAUTY

YVES ROCHER

SEPHORA

MAC

KIEHL'S

ONLINE

AMAZON CANADA

WELL.CA

WAYFAIR

EBAY

FURNITURE

IKEA

LINEN CHEST

KITCHEN STUFF PLUS

THE BRICK

SPECIALTY

NESPRESSO

DAVID'S TEA

CHOCOLATS FAVORIS

KEURIG

CULTURE

CHAPTERS INDIGO

ARCHAMBAULT

RENAUD-BRAY

DESERRES

MICHAEL'S

PETS

MONDOU

PET SMART

PET VALUE

SHOES

COLE HAAN

ALDO

BROWNS SHOES

SHOE COMPANY

STEVE MADDEN

ELECTRO

APPLE

STAPLES

BEST BUY

INSURANCE

INDUSTRIAL ALLIANCE

SUN LIFE FINANCIAL

SSQ INSURANCE

ALLSTATE INSURANCE

BELAIRDIRECT

RANKING BY SECTOR

FOOD

AMAZON / FOOD

- COSTCO
- METRO
- MAXI
- LOBLAWS
- PROVIGO
- SOBEYS
- GROCERY GATEWAY
- REAL CANADIAN SUPERSTORE
- WALMART / FOOD

FINANCE

TD BANK

- TANGERINE
- RBC ROYAL BANK
- BMO BANK
- CIBC BANK
- SCOTIA BANK
- DESJARDINS
- NATIONAL BANK
- BLC BANK

DEPARTMENT

SIMONS

STORE

- CANADIAN TIRE
- WALMART
- HUDSON'S BAY

FOOD

COOK IT

DELIVERY

- GOODFOOD MARKET
- MISS FRESH

GAMING

LOTO-QUÉBEC

- ONTARIO LOTTERY AND GAMING CORPORATION

EYEWEAR

BON LOOK

- GREISHE & SCAFF
- IRIS
- NEW LOOK

PHARMACY

JEAN COUTU

- BRUNET
- FAMILIPRIX
- PROXIM
- SHOPPERS DRUG MART
- UNIPRIX
- IDA & GUARDIAN
- REXALL

HARDWARE

LEE VALLEY

- CANAC
- LOWE'S
- PATRICK MORIN
- HOME DEPOT
- RONA
- RÉNO-DÉPÔT
- BMR

RANKING BY SECTOR

SPORTS

MEC

LA CORDÉE
SPORTS EXPERTS /
ATMOSPHERE

TELCO

FIZZ

VIDÉOTRON
VIRGIN MOBILE
KODOO
EBOX
FIDO
TELUS
ROGERS
BELL

TRANSPORT

STM

VIA RAIL

CLOTHING

PENNINGTONS

DYNAMITE
ADDITION ELLE
REITMANS
BANANA REPUBLIC
H&M
LE CHÂTEAU
RW&CO
GARAGE
FRANK AND OAK
ZARA
HARRY ROSEN
FOREVER 21
MOORES

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WOW

THE TOP RETAILERS IN ONTARIO

9th Edition 2019

EVENT GUEST SPEAKER



ERIC MATUSIAK

Partner, National Retail
Group Leader, BDO

BDO

BDO CANADA

125+ \$640M

OFFICES ACROSS CANADA

IN REVENUE

MID MARKET FOCUSED

475 Partners | 3,600 + Personnel | 98 Years Experience



AUDIT & ASSURANCE



ASSURANCE



ACCOUNTING



BOOKKEEPING



PAYROLL/CFO SERVICES

ADVISORY SERVICES



CONSULTING



FINANCIAL RECOVERY



FINANCIAL ADVISORY



OUTSOURCING



SRED

TAX



CORPORATE



PERSONAL

RETAIL 2020

The Path Forward



**Market
Polarization**



**Real Estate
Re-Think**



**The Next Digital
Disruptors**



**Omnichannel
is Dead**



**CEX:
Invest for
Success**

MARKET POLARIZATION

Time to Pick a Side?

LUXURY

In 2017, almost 40% of international entrants to the Canadian retail market were luxury brands.



VALUE

39% of respondents in the RCC Survey named finding a great deal as the shopping activity they enjoyed the most.

THINK OUTSIDE THE (BIG) BOX

New Formats: New Opportunities



THINK OUTSIDE THE (BIG) BOX



DIGITAL: NO LONGER THE NICE TO HAVE

The Next Big Disruptors

- Voice
- Robotics
- Artificial Intelligence
- Blockchain
- 5G



OMNICHANNEL IS DEAD ... LONG LIVE OMNICHANNEL

Frictionless integration is the
new standard

- Customer facing aspects must integrate with back-office processes
- Engage customers both online and off
- Align e-commerce with in-store experience

Brooks Brothers

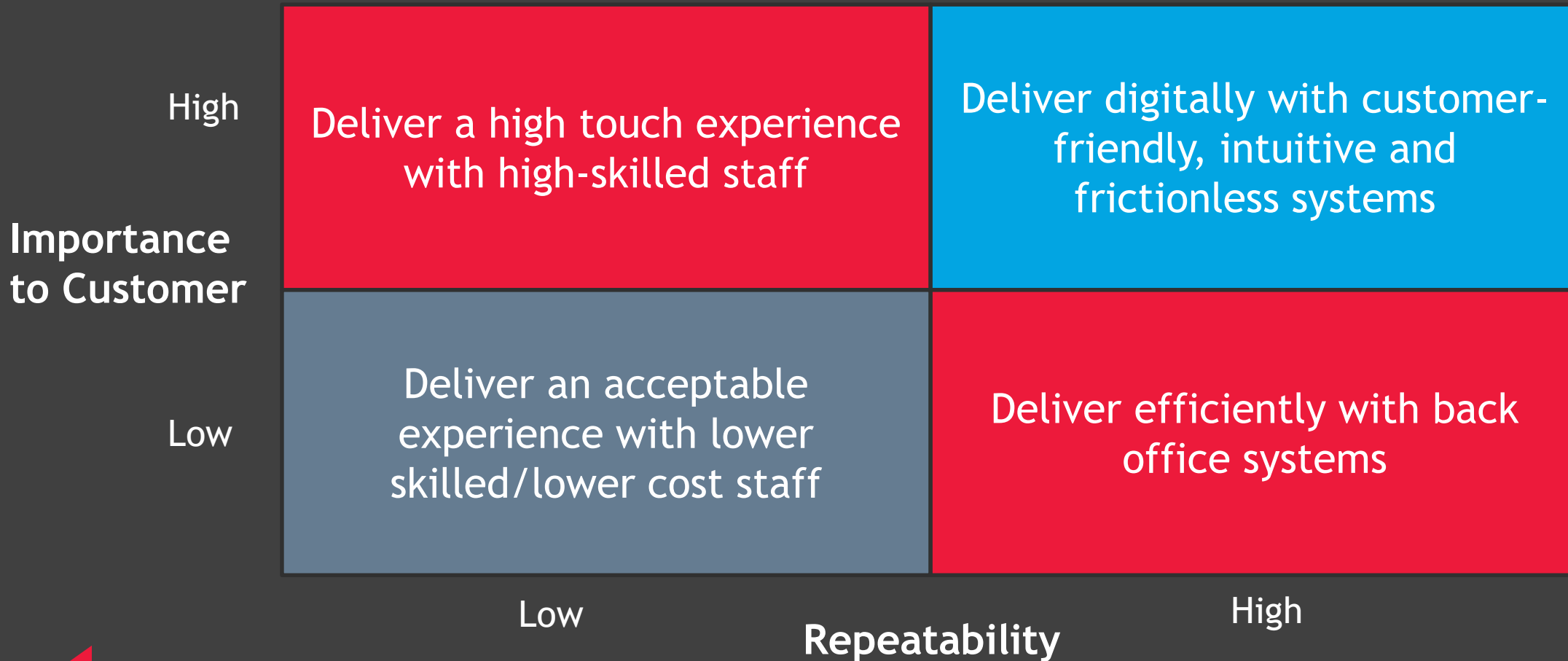


Walmart 

 MOUNTAIN
EQUIPMENT
CO-OP®

BDO

CEX: WHERE TO INVEST?





WHAT'S NEXT?

- Take a hard look at your value drivers - why do consumers pick you?
- Make every square foot count - traffic, basket, experience, loyalty
- Invest in the next wave of technologies
- Be relentlessly frictionless
- Get ROI from your CEX investments

CONTACT

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Leader

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DOWNLOAD

RETAIL TRENDS 2020

<https://insights.bdo.ca/retail-trends>