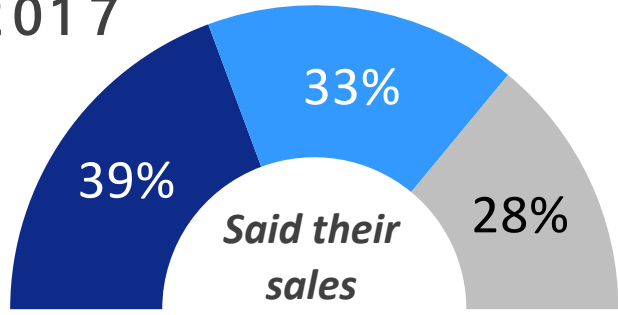


# Shop Insights™

## Retail Council of Canada 2018 PULSE CHECK

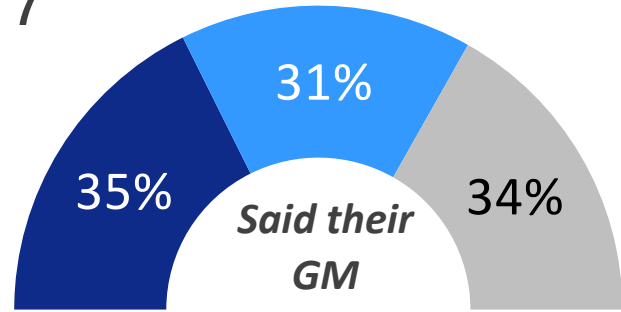
Sales Q1 2018 Vs. Q1 2017



■ Increased ■ Decreased ■ Remained the same

By **15%** **13%** ON AVERAGE

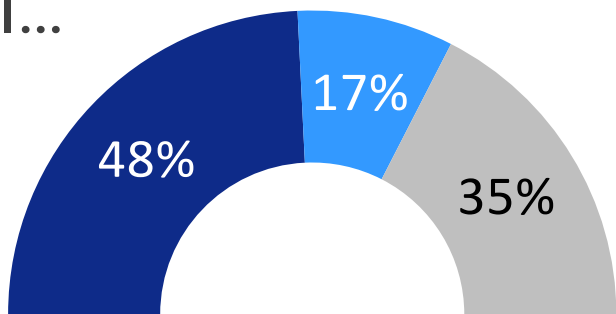
Gross Margin Q1 2018 Vs. Q1 2017



■ Increased ■ Decreased ■ Remained the same

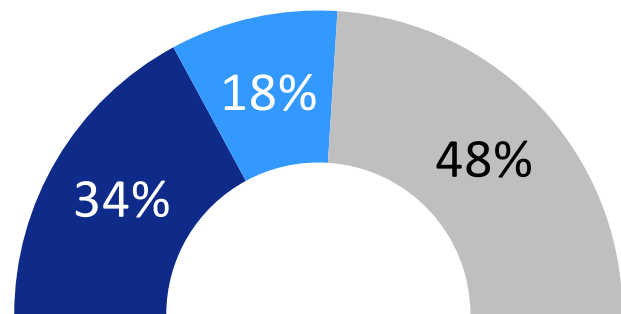
By **7%** **9%** ON AVERAGE

In the remainder of 2018 SALES will...



■ Increase ■ Decrease ■ Remain the same

GROSS MARGIN will...



■ Increase ■ Decrease ■ Remain the same

### INCREASE

### DECREASE

Because of changes in... Because of changes in...



**53%**  
MARKETING STRATEGY



**61%**  
LOCAL/REGIONAL ECONOMY



**47%**  
STORE OPERATIONS



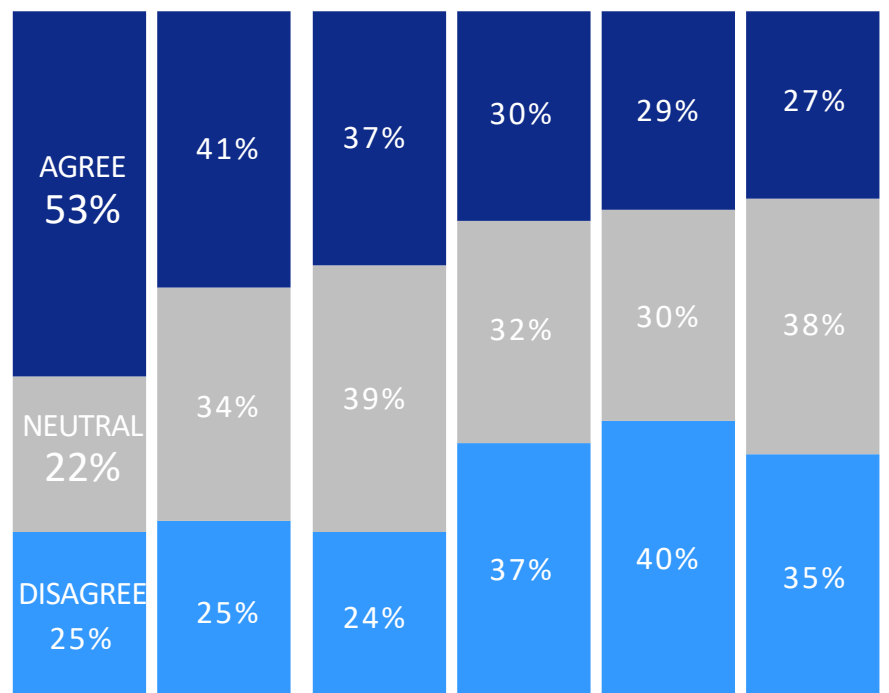
**46%**  
COMPETITION FROM OTHER RETAILERS



**46%**  
LOCAL/REGIONAL ECONOMY



**36%**  
GOVERNMENT REGULATIONS



Overall, I feel more optimistic in 2018

Customers appear to be purchasing more in each transaction on average

Customers seem more optimistic in 2018

I am seeing a larger number of customers in my store in 2018

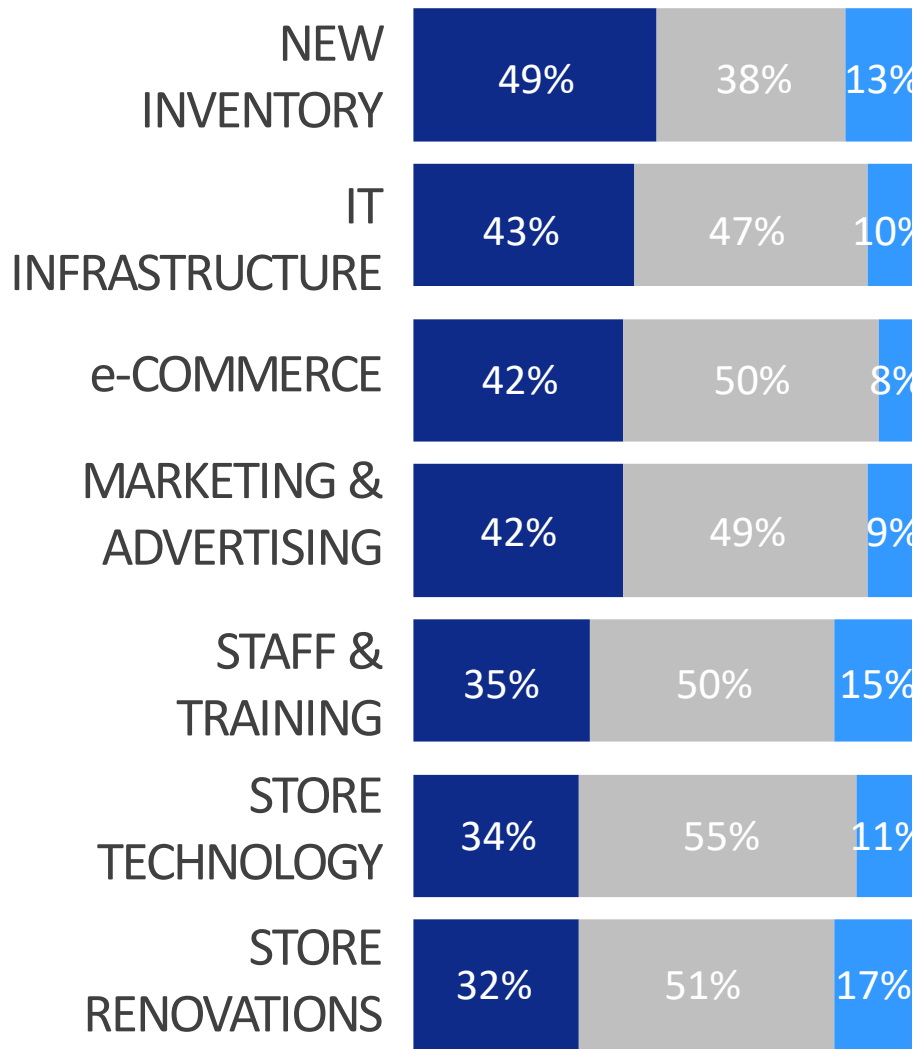
Customers appear to be spending more freely in 2018

Customers appear to be purchasing more frequently

# 2018 PULSE

## EXPECTED CHANGES IN INVESTMENT

INCREASE IN INVESTMENT | DECREASE



## CONCERNED | NOT CONCERNED



# 96%

ARE PRESENT ON AT LEAST ONE OF THE FOLLOWING...



AVERAGE INTENDED INVESTMENT ON A SCALE OF 1-5



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