Canadian Shopper Insights

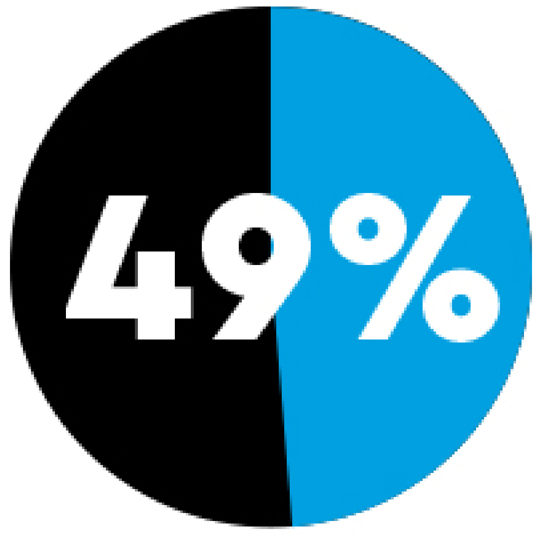
As Canadians grapple with accepting the longevity of COVID-19 restrictions, their attitudes about shopping remain affected by anxiety, but are also showing signs of the different ways in which they are coping with the situation.

Throughout, we've noted week-over-week changes from March 28th data.

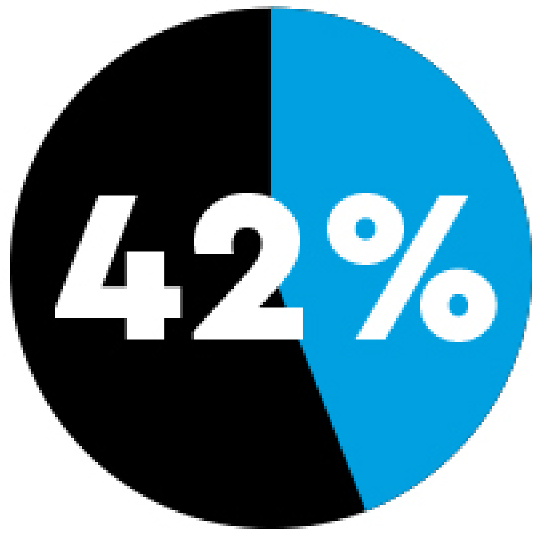
Whether they are shopping in store or online, consumers are actively seeking or passively open to ways brands can help them stretch their budget.

88%	3%	Displays in the store promoting a sale price
79%	5%	Online advertising (social media or websites) providing a special offer (sale price, discount, free delivery)
73%	9%	Online advertising (social media or websites) introducing a new product
70%	8%	Displays in the store introducing a new product
67%	15%	Online advertising (social media or websites) promoting a contest
62%	18%	Displays in the store promoting a contest

Shopping behaviours imply the different ways people are seeking comforts are evolving over time.

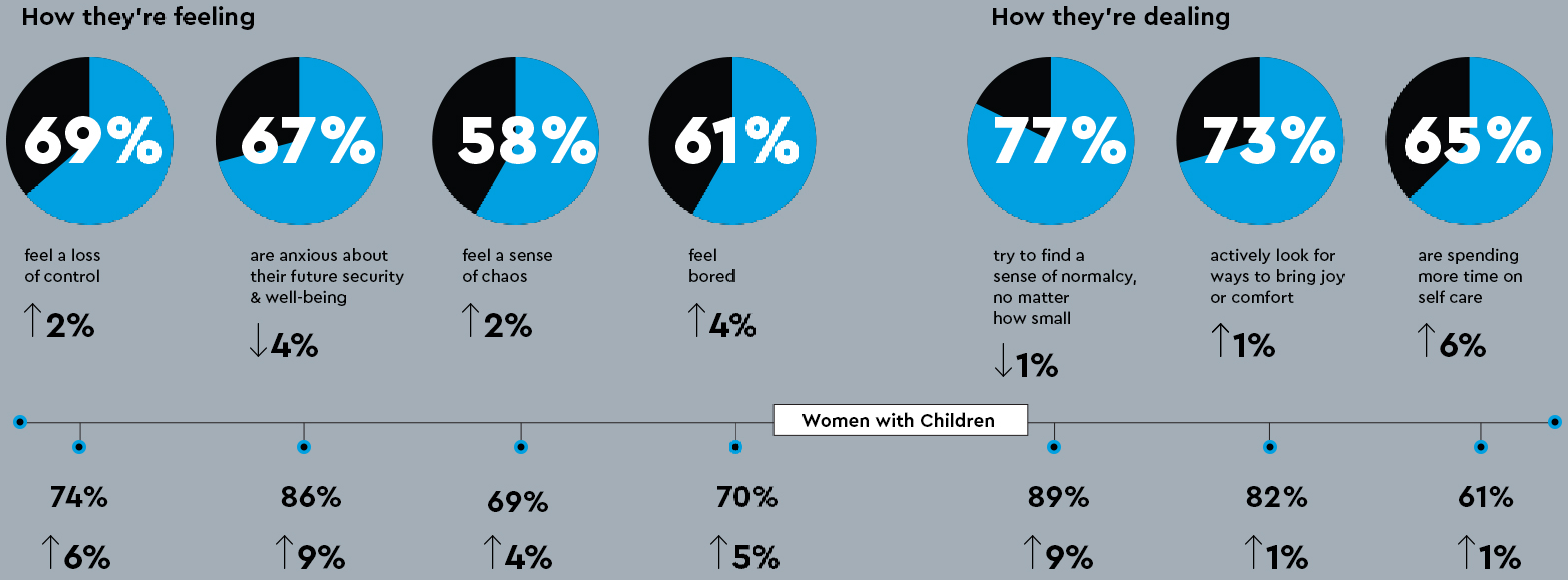


↑ 1%
are turning to small indulgences like sweets & salty snacks

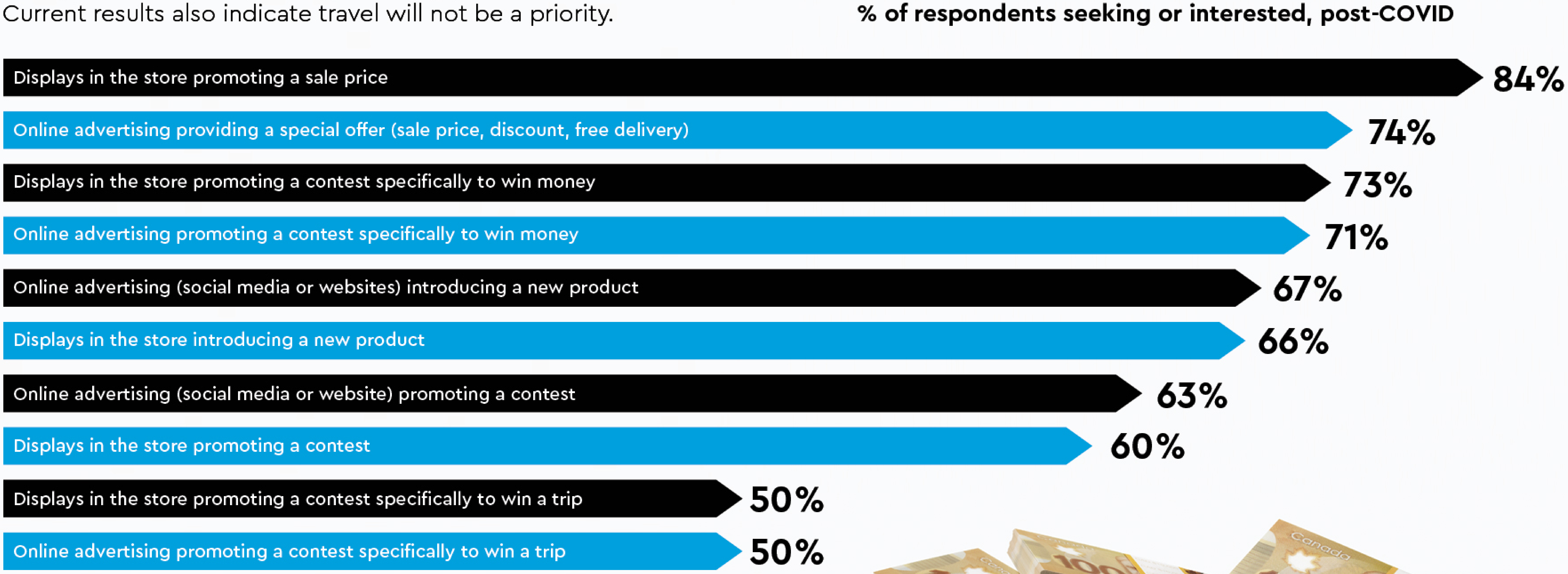


↑ 9%
buying healthier food than normal

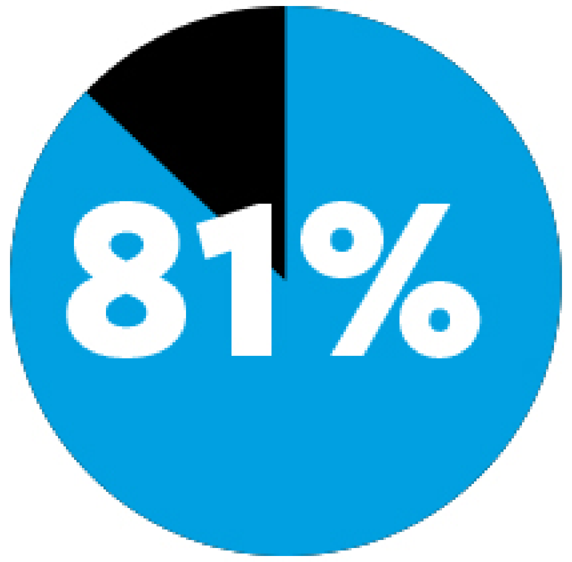
The majority of Canadians are having increasingly negative reactions to COVID-19 and the corresponding restrictions, but they're attempting to answer new challenges with positive efforts to improve their attitude.



As shoppers, they're also beginning to picture what 'back to normal' will be like. When asked what kinds of brand communications will be relevant post-COVID, cash prizes and money-saving offers topped the list. Current results also indicate travel will not be a priority.

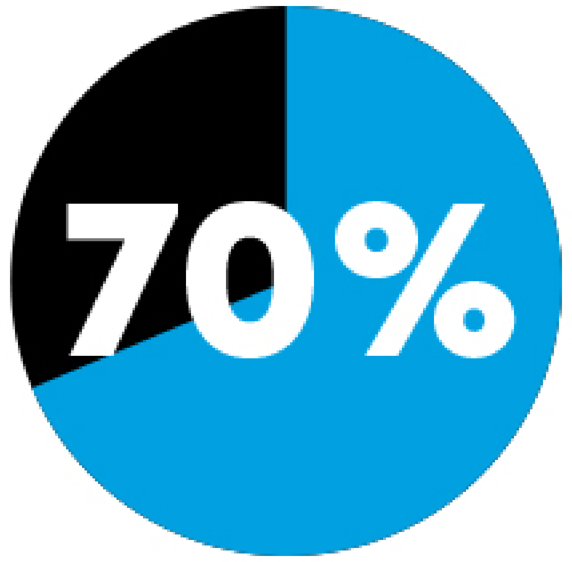


With additional government restrictions and wider public adoption of Stay at Home behaviour this week, we see a continued increase in discomfort with shopping in physical stores. Drug stores have taken the most dramatic hit over the past weeks, indicating that consumers are more committed to a single-destination shop. In this case, we've noted week-over-week changes from the first wave, March 21st data.



are nervous about shopping in **grocery** stores

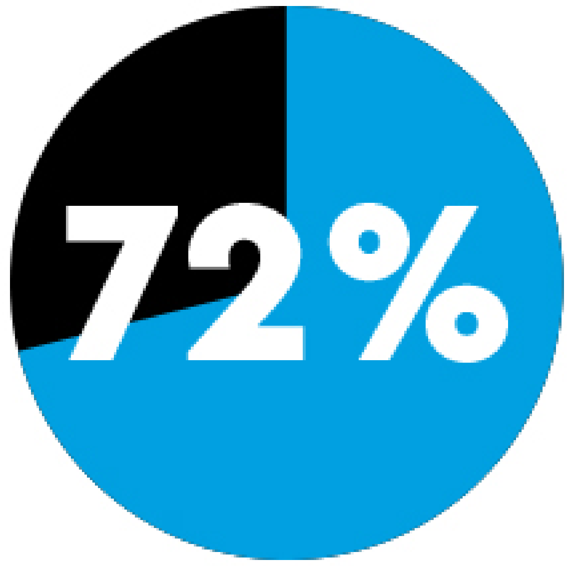
↑7%



are nervous about shopping in **drug** stores

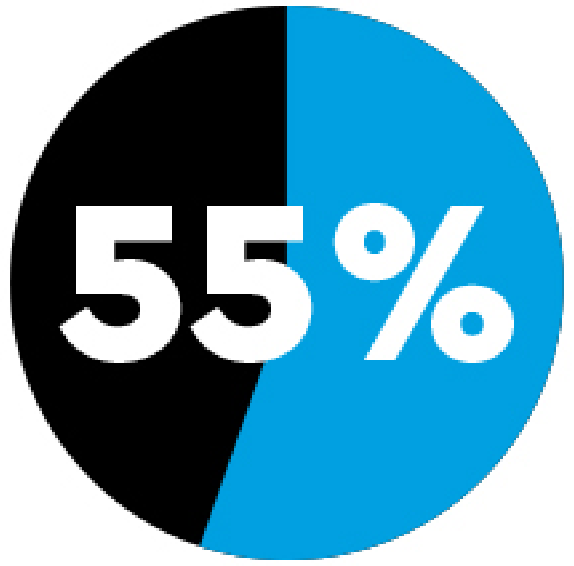
↑3%

Nervousness is translating more and more to avoiding these destinations.



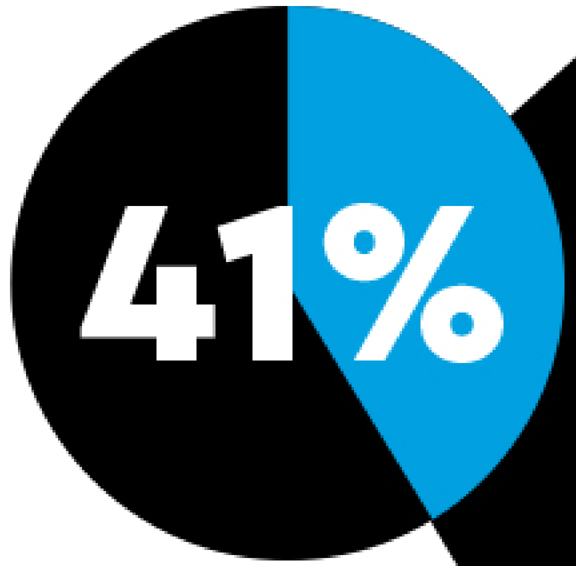
Going into grocery less often

↑4%



Going into drug stores less often

↑20%



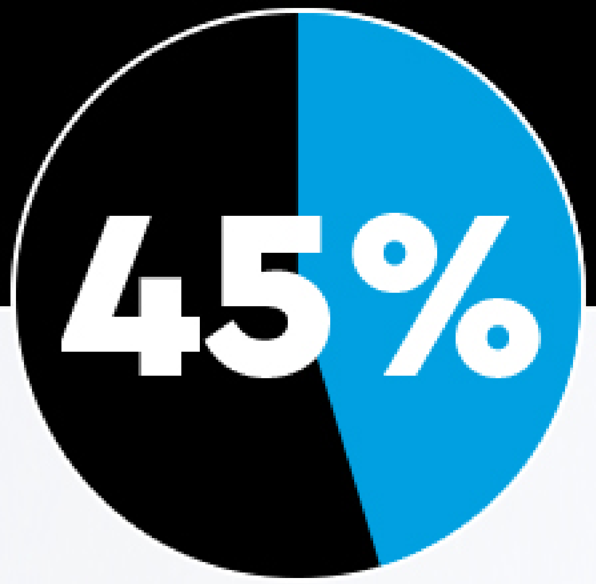
Going into convenience less often

↑6%

Shoppers also continue to try online options to avoid physical stores.
And in both cases, they are accepting alternate products and brands as a result.

are having to make substitutions from normal purchases	+5%	63%
care more about getting the product than the brand	+1%	66%

Shopping behaviour has changed significantly over the past 3 weeks and continues to evolve. When COVID-19 first took hold, shoppers were positive about their first-time experiences with newer fulfillment methods. Now, the romance is softening, particularly for click & collect. This loss of enthusiasm could be attributed to long delivery times, necessary brand substitutions and products not being available. On the flipside, some shoppers say they will continue to frequent brick + mortar stores less often post COVID-19.

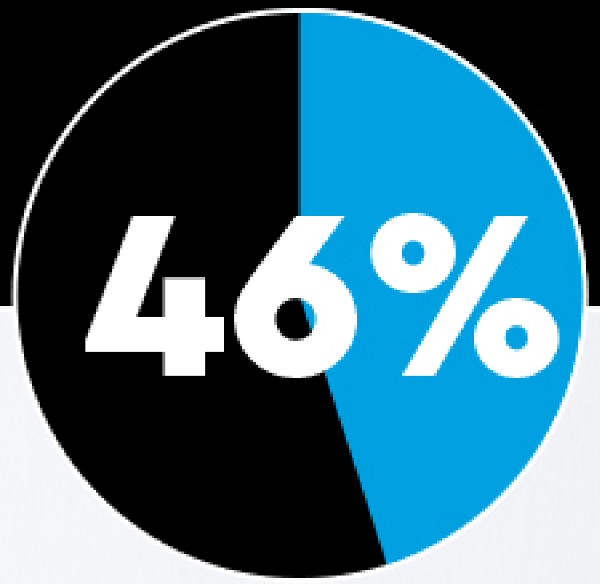


first-time "click & collect" shoppers think they'll continue **post COVID-19**

↓17%

first-time online merchant (Amazon) shoppers think they'll to continue **post COVID-19**

↓ 3%

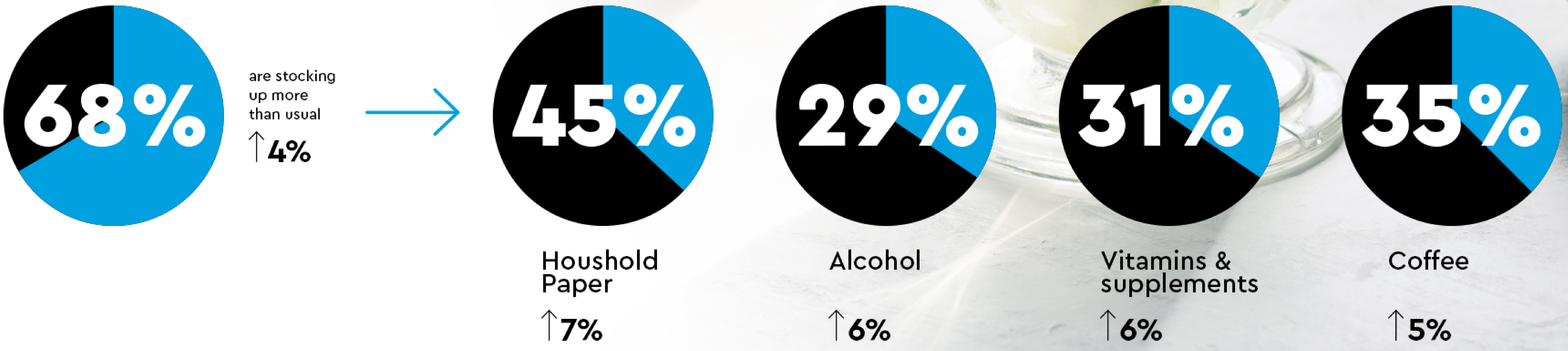


first-time grocery delivery shoppers think they'll continue **post COVID-19**

↑4%

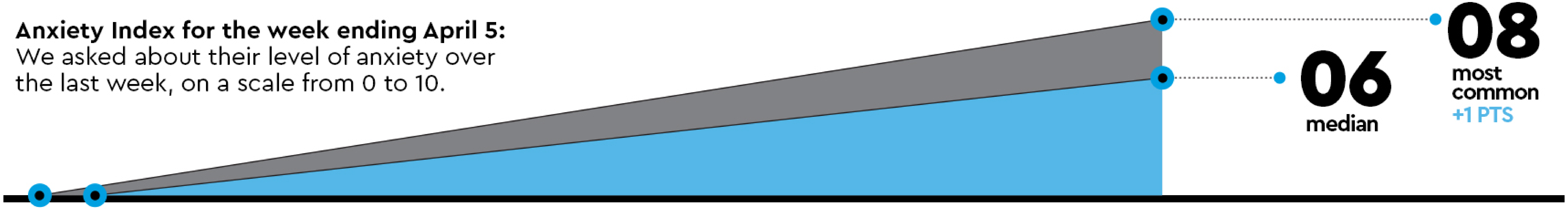
shoppers think they'll shop less in physical grocery stores **post COVID-19**

Stocking up behaviour persists, with different categories taking the lead this week. Household paper and coffee remain in demand, reflecting persistent scarcity fears and consumption realities of working from home. And newer products that are considered less essential – **alcohol and vitamins – are also now seeing a surge.**

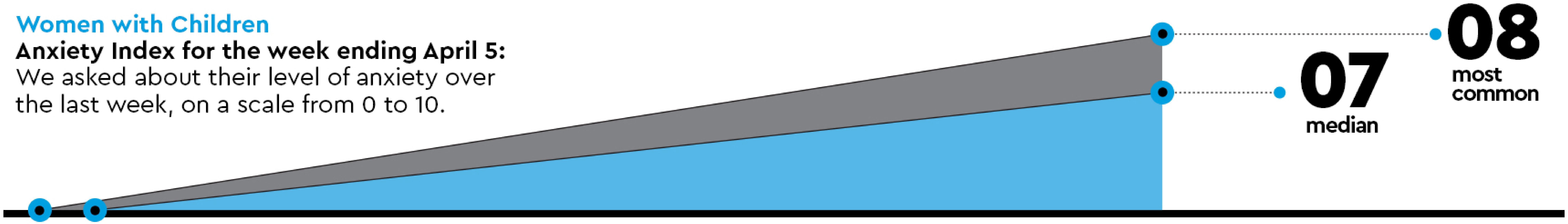


Overall, the anxiety index remains similar to last week. However, there's been a slight pull downward of those with the highest levels of anxiety in previous weeks (those who indicated levels of 9 or 10) suggesting the general feeling of personal anxiety among Canadian shoppers is beginning to level off.

Anxiety Index for the week ending April 5:
We asked about their level of anxiety over the last week, on a scale from 0 to 10.



Women with Children
Anxiety Index for the week ending April 5:
We asked about their level of anxiety over the last week, on a scale from 0 to 10.



Methodology: Surveyed 500 National English-Speaking Canadians on April 4, 2020. Week-over-week data compared to results from survey deployed on March 28, 2020, unless noted otherwise.