



Discovery + Disruption

The future of food shopping in Canada



Agri-Food
Analytics Lab

Make better decisions, faster, with access to rapid insights at every stage of the consumer journey

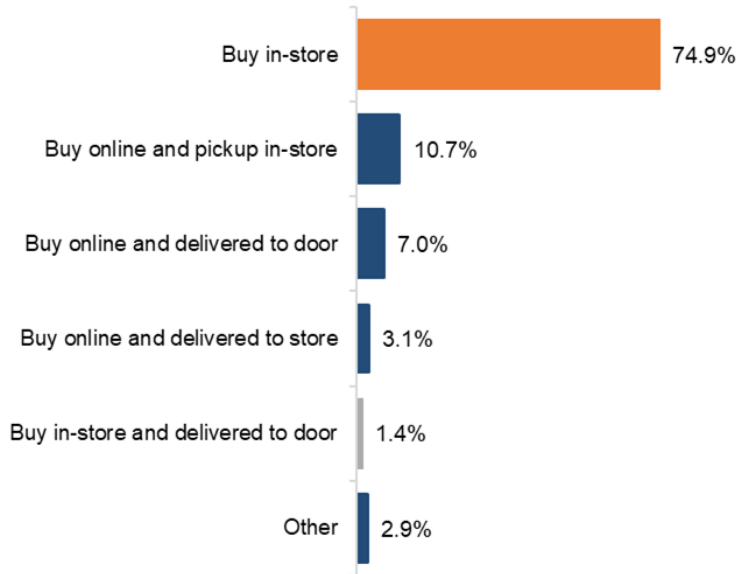
Methodology

A representative survey of Canadians was conducted in May 2021, in partnership with Dalhousie University. 10,000 Canadians participated in this survey.

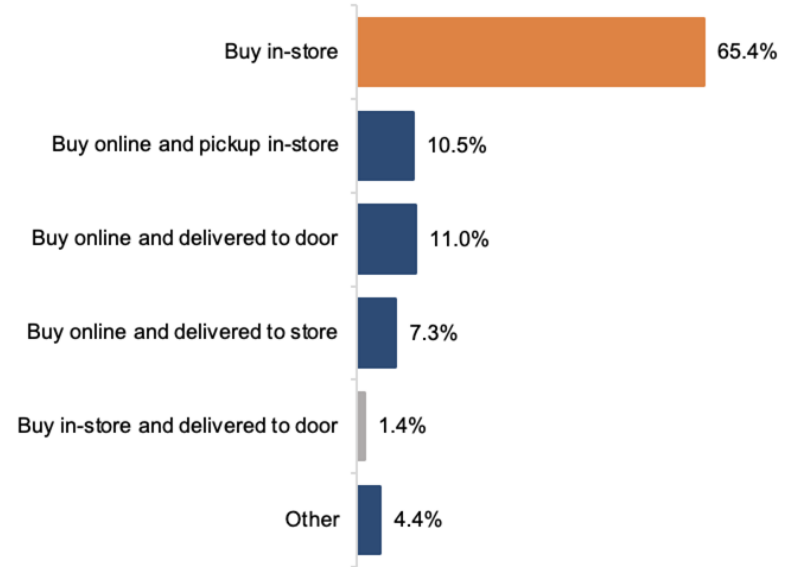
Margin of Error: +/- 1.2%, 19 times out of 20. Any discrepancies in or between totals are due to rounding.

In-store is here to stay, but Canadians are exploring

Which method do you plan to use to purchase your groceries in the next 6 months the most?



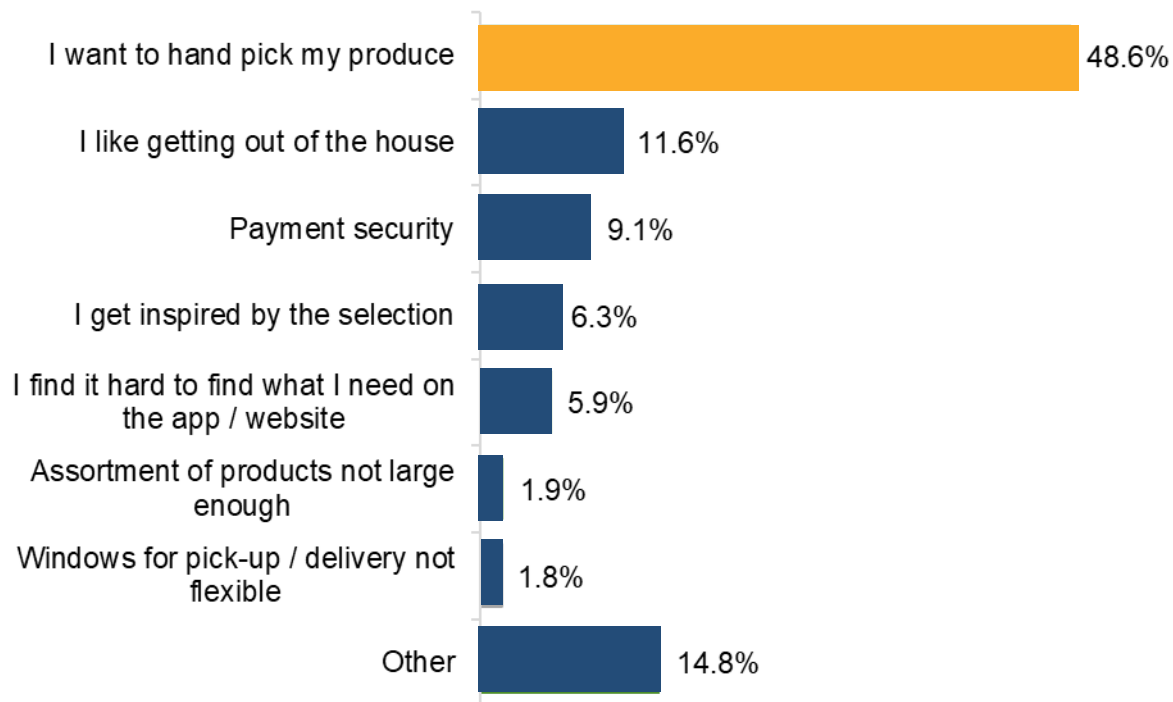
General Population



Generation Z

The Role of Produce: Gen Z and Urban consumers care the most about hand picking produce

If you do not shop for groceries online, what is stopping you? (n=1033)



The Type of Store Canadians are Choosing

Top grocery store formats
Canadians plan to shop at in
the next 6 months

60%

Club/Mass



58%

Traditional
grocery stores



54%

Discount
grocery stores









24%

Drug stores





is the pandemic winner with a 73 Net Promoter Score

	General Population	Millennials
2nd place	 	 
3rd place		
Top factors	Value is a key driver when ranking net promoter scores for grocery retailers	Convenience, Self Checkout & Product Assortment

25%

have changed where they
grocery shop during
COVID-19

73%

of Canadians are influenced
by loyalty programs when
purchasing food products

70%

actively look for
promotions and
discounted food products

Fate of the Big 3 Grocery Retailers

The influence of the three major food retailers, Loblaw, Sobeys, and Metro, appears to be eroding.

24%

are likely to visit a drug store for food

17%

frequent a dollar store

10%

shop on Amazon for food products

What's more: 70% of Amazon Subscribe & Save users are likely to use Amazon Fresh Grocery when available

Caddle Survey | March, 2021 |

n = 577

Caddle Survey | May, 2021 |

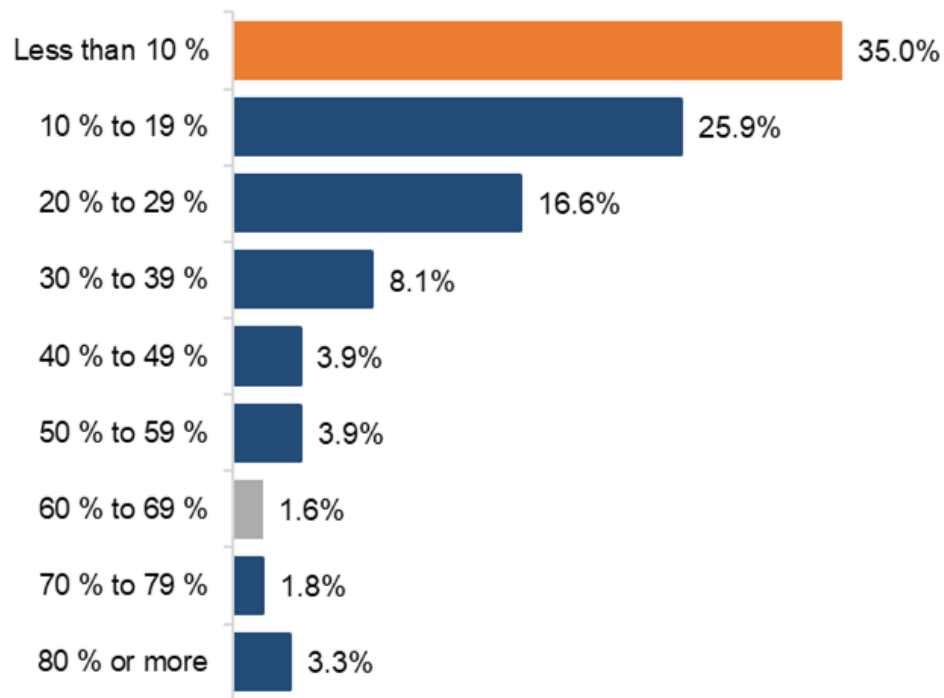
n = 10,024

Caddle® Inc. Confidential

Fate of Independent Grocers

Independent retailers are popular: 60.9 % of Canadians want to spend up to 19% of their food budget at independently owned and operated stores.

What percentage of your total grocery purchases do you think will be to local businesses in the next 6 months?



Store of the future

76%

want grocers to carry more local products, but only 47% intend to buy

~40%

intend to use self-checkouts most of the time in the next 6 months

55%

think a redesigned store allowing for physical distancing will increase UX

69%

are typically willing to travel <9km to a grocery store



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