



Food Inflation: Where are we now?

Trends from July 2022 to July 2023



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



Who We Are



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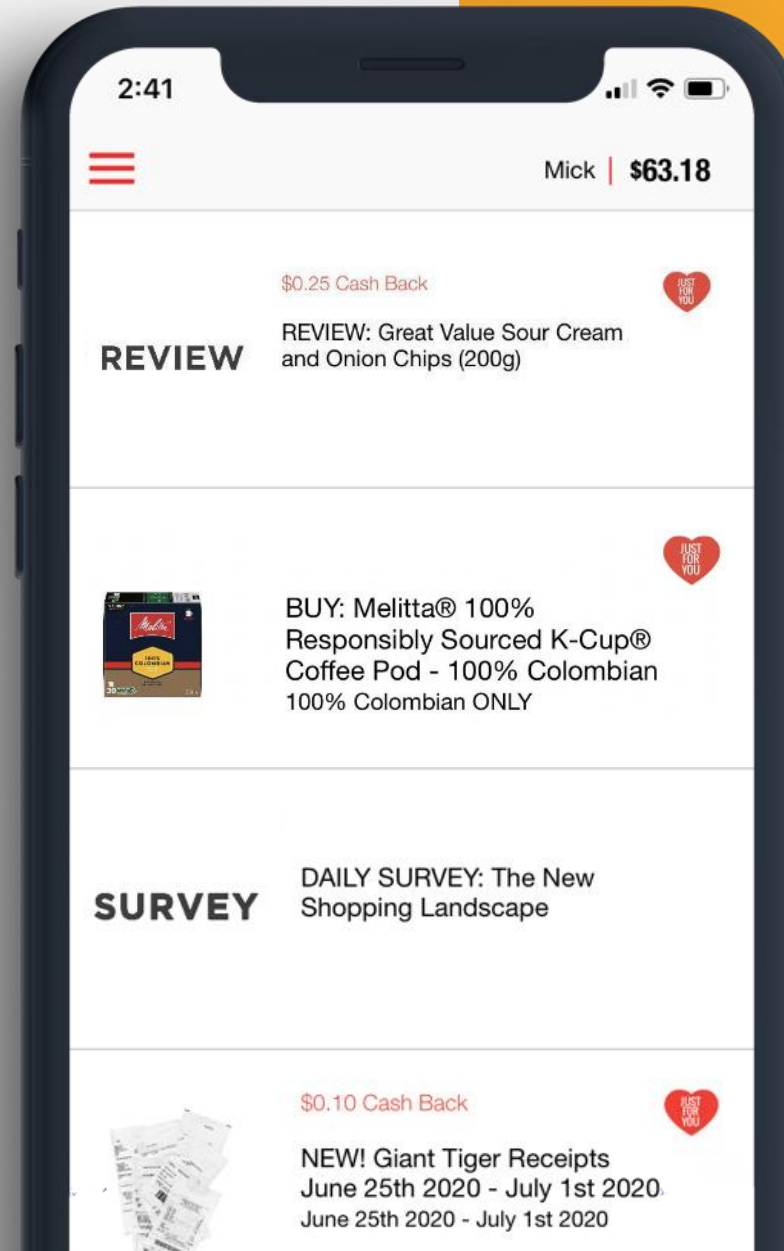
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AskCaddle®

Caddle® is the largest daily and monthly active panel in the Canadian market. Our mobile-first insights platform rewards Canadians for sharing data and engaging with brands.



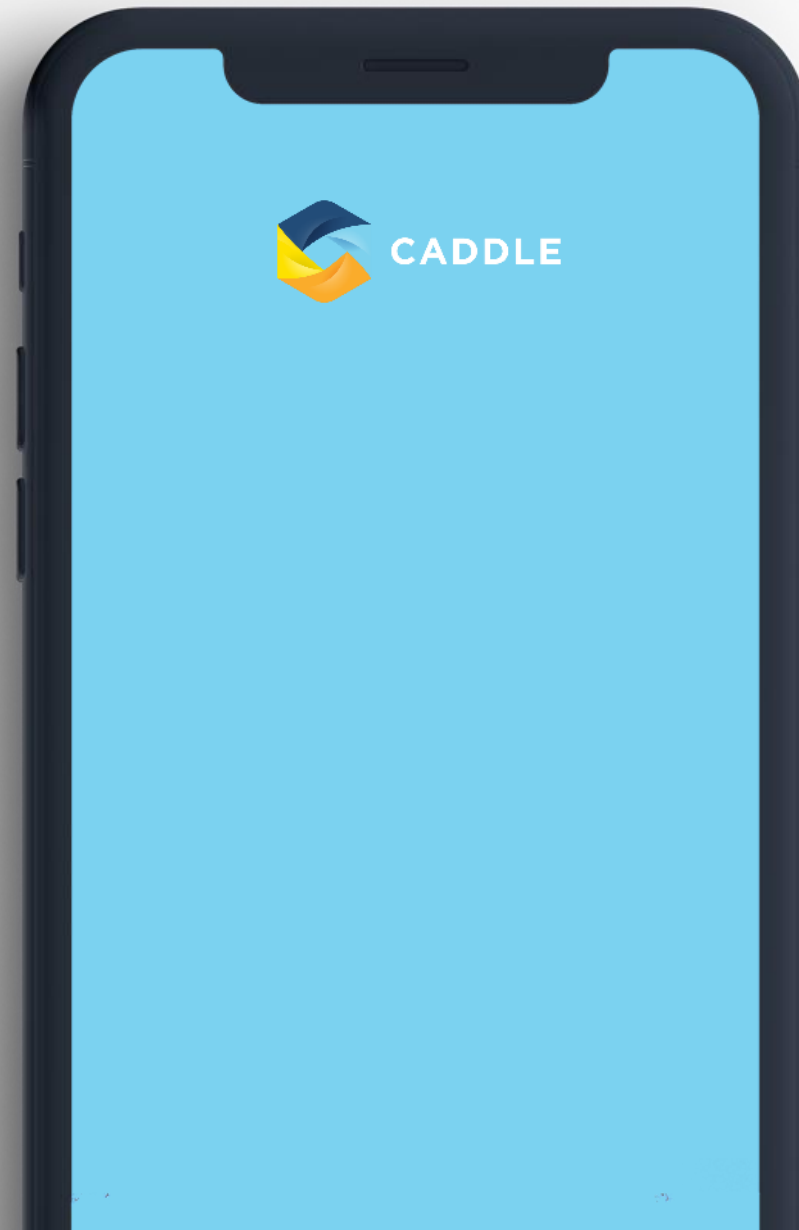
Methodology

A representative survey of Canadians was conducted in July 2022 and July 2023.

Sample sizes were $n=3,129$ and $n=3,087$ Canadians respectively.

Grocery categories were the focus of this study.

All data presented is owned by Caddle and has a Margin of Error of 1% or lower.



Introduction to Food Inflation: Understanding the Current Landscape



Grocery Inflation Headline in 2022

**Grocery prices in Canada
continue meteoric ascent, rising
at fastest pace since 1981**



The Canadian Press
Brett Bundale

National Post, September 20, 2022

Grocery Inflation Headline in 2023

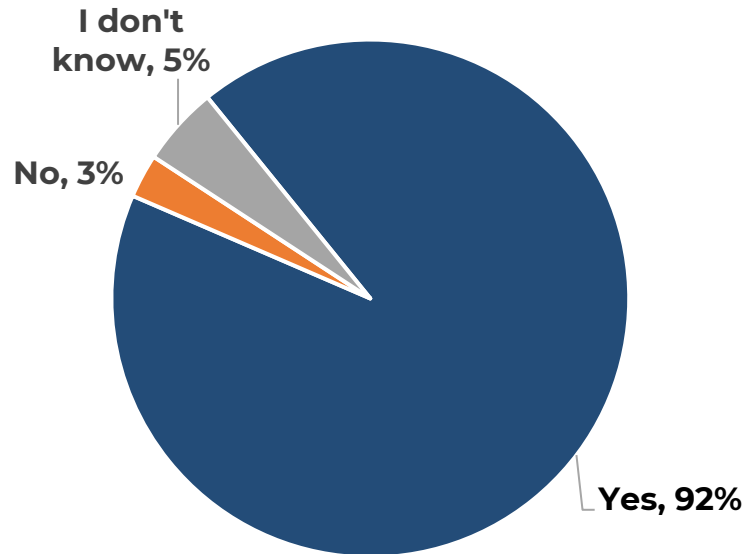
Canada's inflation rate is falling, so why are grocery prices still so expensive?

CTV News, August 7, 2023

Consumers still think food is more expensive

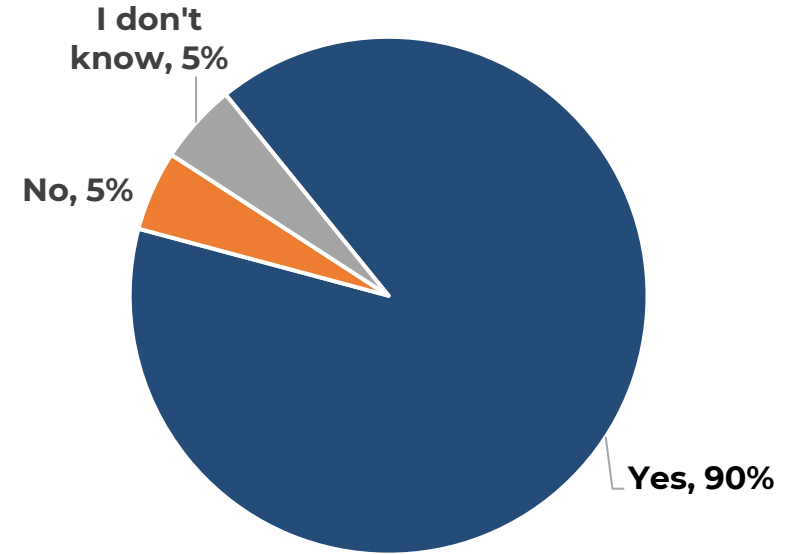
92%

Do you think food is more expensive than it was 3 months ago? July 2022



90%

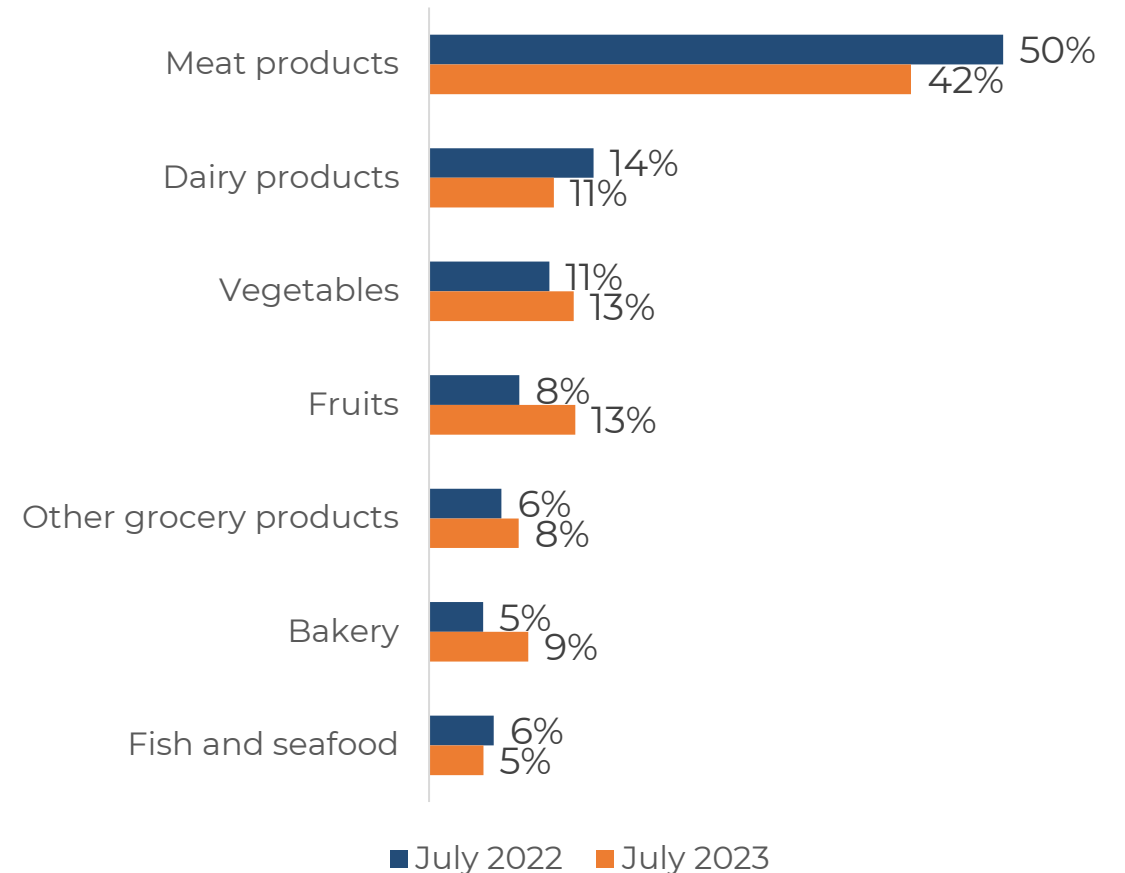
Do you think food is more expensive than it was 3 months ago? July 2023



Meat remains at the most expensive category

- Meat still dominates as the most expensive food category, despite dropping 8% from 2022 (50%) to 2023 (42%). Dairy Products and Fish seafood dropped as well by 3% and 1% respectively.
- The other categories have increased, notably Fruits (5% increase) and Bakery products (4%).

In your view, what food categories are now more expensive than 3 months ago?

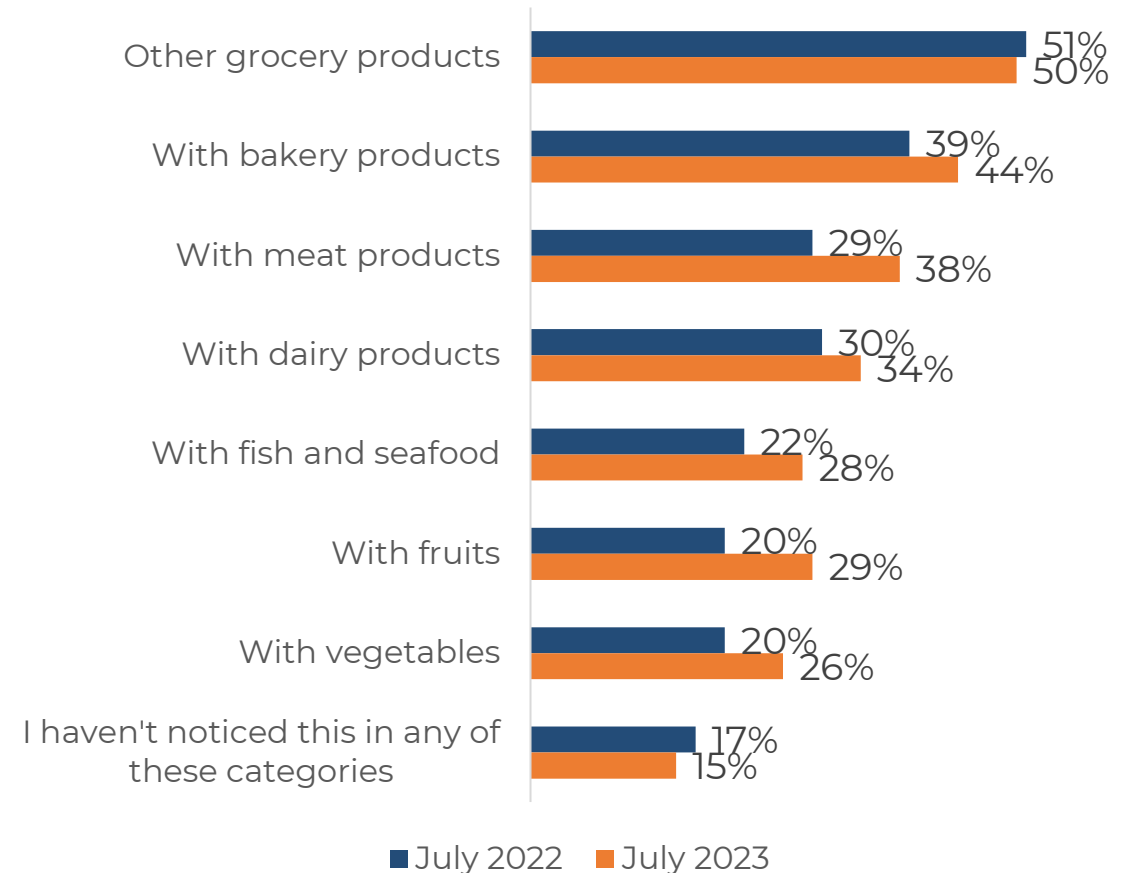


Sorted by total average of July 2022 and July 2023

Consumers are seeing more 'Shrinkflation'

- Across all specific categories there have an increase in reduction of product size with an average change of 6% where there has been an increase in reduction seen.
- Notable categories include other grocery products, bakery products and meat products.
- Meat products and fruits also had the highest change of 9% from 2022 to 2023.

Have you noticed a reduction in product size / volume / quantity for a similar price from 3 months ago in any of the following categories?



Sorted by total average of July 2022 and July 2023

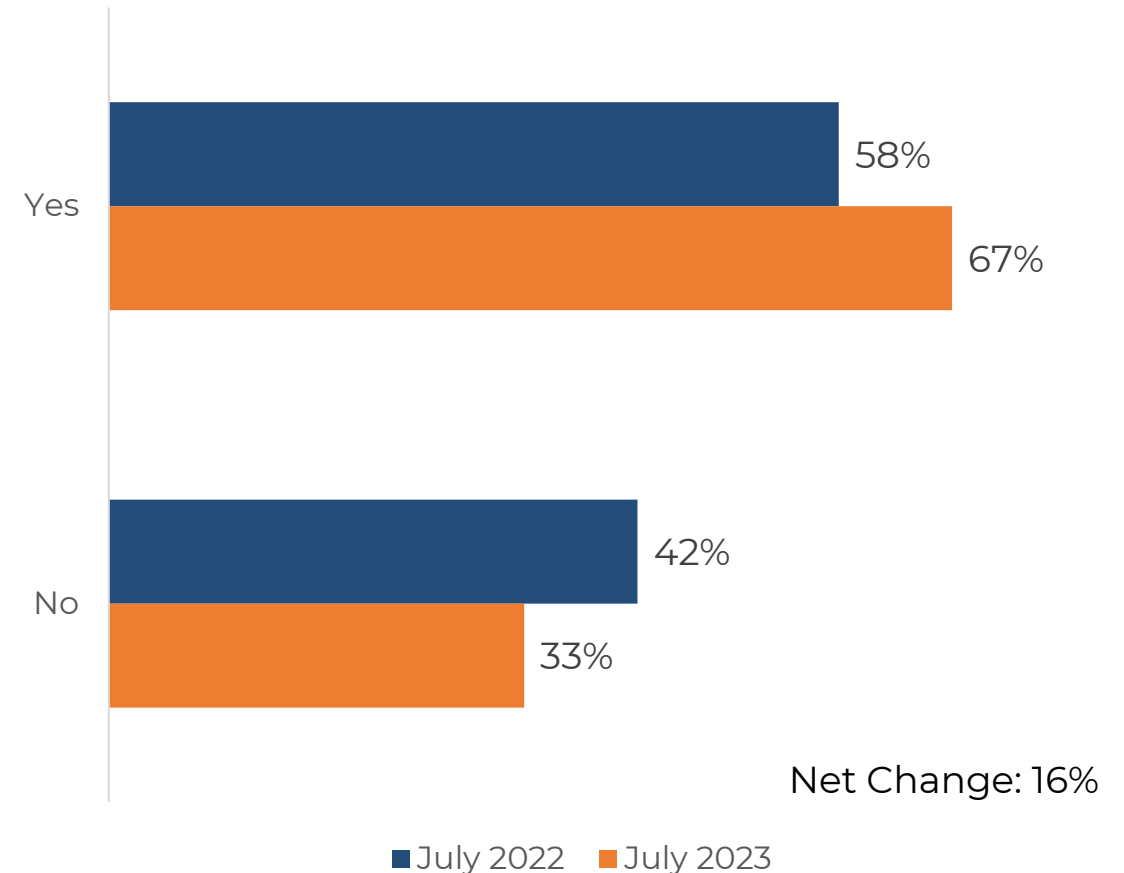
Analyzing Consumer Behavior



Consumers are reducing meat purchases even more than before

- In 2023, both Males (66%) and Females (68%) have reduced meat purchase than in 2022 (Males 57%, Females 60%).
- Amongst Generations, Baby Boomers (71%) have reduced their meat purchases the most in 2023 from 2022 (61%) followed by Millennials (68%) in 2023 from 2022 (61%).
- Topping the metropolitan areas, Calgary stood in 2023 (78%), also experienced the biggest change from 2022 (65%), a 13% difference.

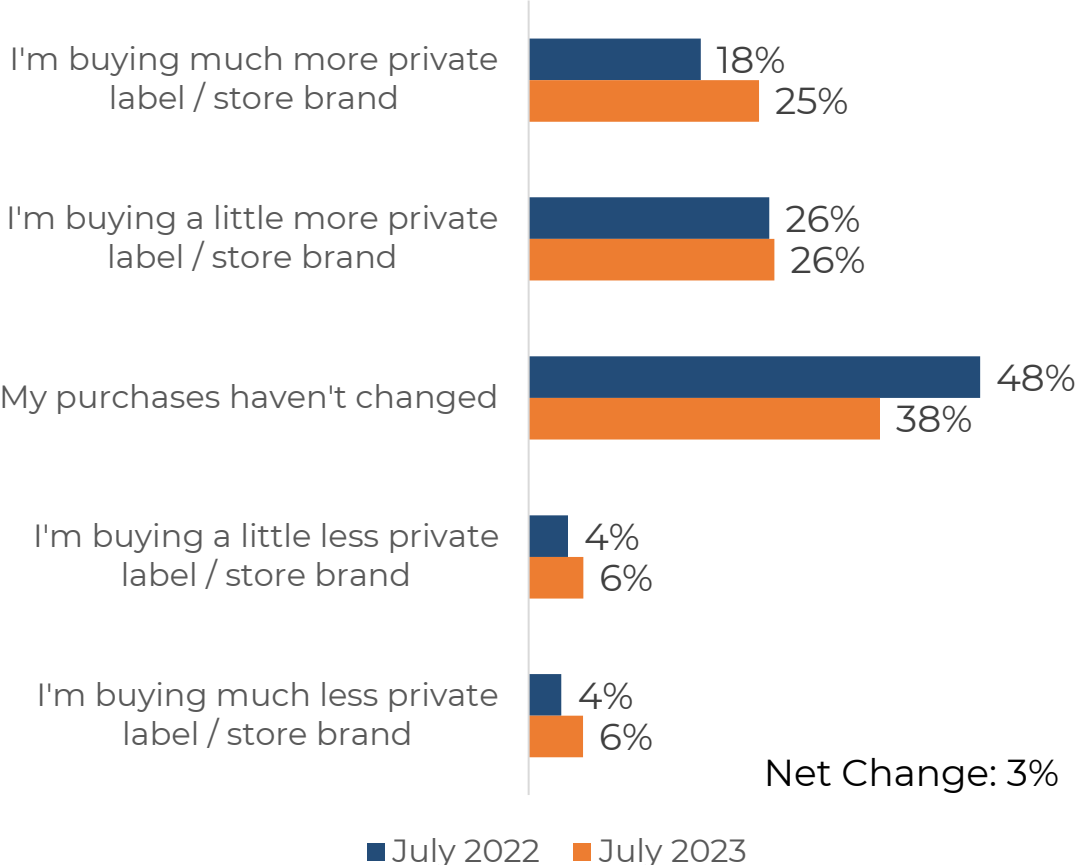
Have you reduced your meat purchases in the last 3 months due to higher prices?



Consumers are increasing the switch to private label brands

- Those who are buying more (much more/a little more) private have increased from 2022 (44%) to 2023 (51%)
- Driving the increase to private label are Millennials (54%) and Generation X (51%). Baby Boomers, however, saw the largest increase of 11% from 2022 (36%) to 2023 (47%).
- Generation Z in contrast saw a 9% reduction in private label brands from 2022 (65%) to 2023 (55%).
- Regionally, the Atlantic saw the biggest move to private label brands, a 17% rise from 2022 (43%) to 2023 (59%).

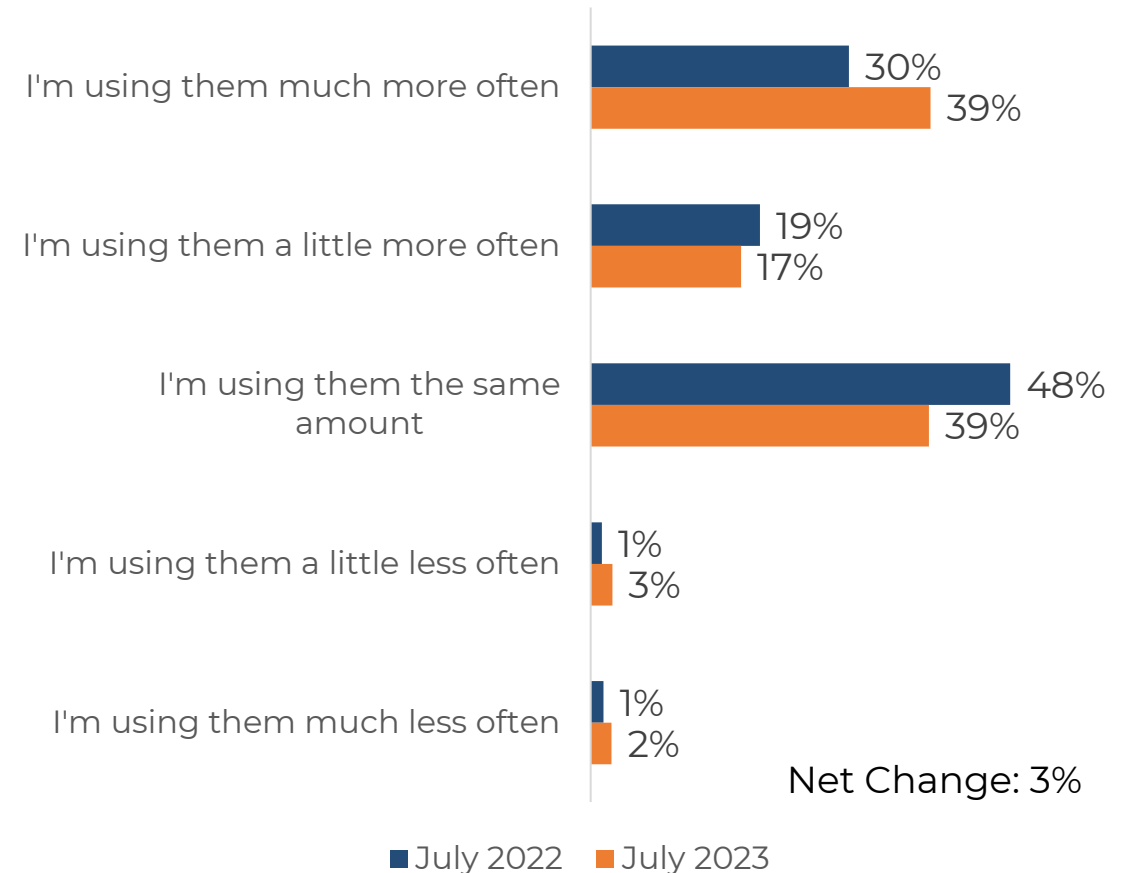
Which best describes your purchases of grocery store brands / private labels (instead of National brands) in the last 3 months?



Consumers are paying more attention to grocery flyers

- Those using flyers (much more/a little more) are now the majority, having increased from 2022 (49%) to 2023 (56%)
- All generational groups saw an increase grocery flyer usage. Millennials are the top users in 2023 (61%), followed by Generation Z (59%). Generation X saw the largest increase of 11% from 2022 (49%) to 2023 (55%).
- Regionally, the highest usage of flyers is in the Atlantic which also experienced the highest increase, a 17% rise from 2022 (46%) to 2023 (63%).

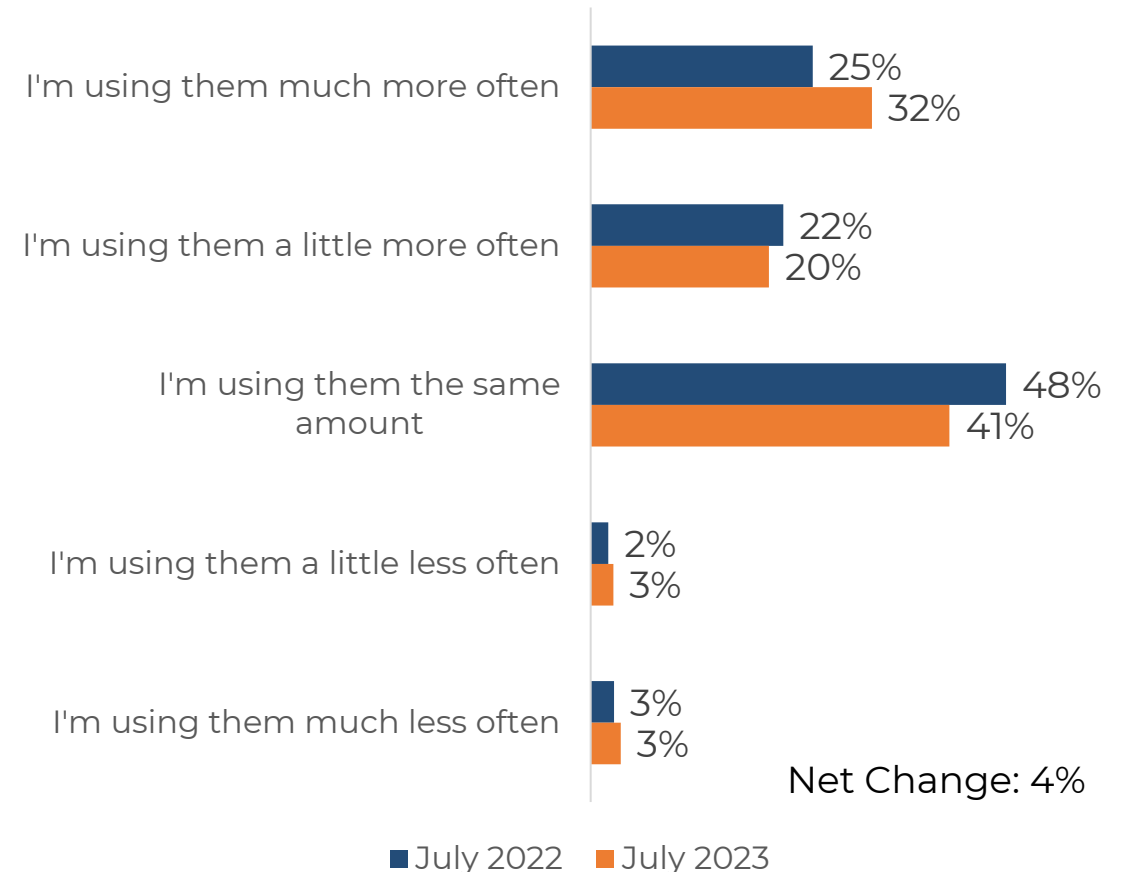
Which best describes your use of weekly grocery flyers for deals and savings in the last 3 months?



Consumers use of coupons have increased in frequency

- The use of coupons or e-coupons (much more/a little more) increased from 2022 (48%) to 2023 (53%), increasing by 5%. However, those consumers using them much more often increase by 7%.
- Millennials overall had the highest increased usage in 2023 (59%), followed by Generation Z (58%). Millennials also saw the largest change of 7% from 2022 (52%) to 2023 (59%). Generation Z (39%) had the highest percentage of those using coupons much more often over Millennials (35%).
- Regionally, Ontario are using coupons more in 2023 (57%) than any other region, with a 7% rise from 2022 (50%).

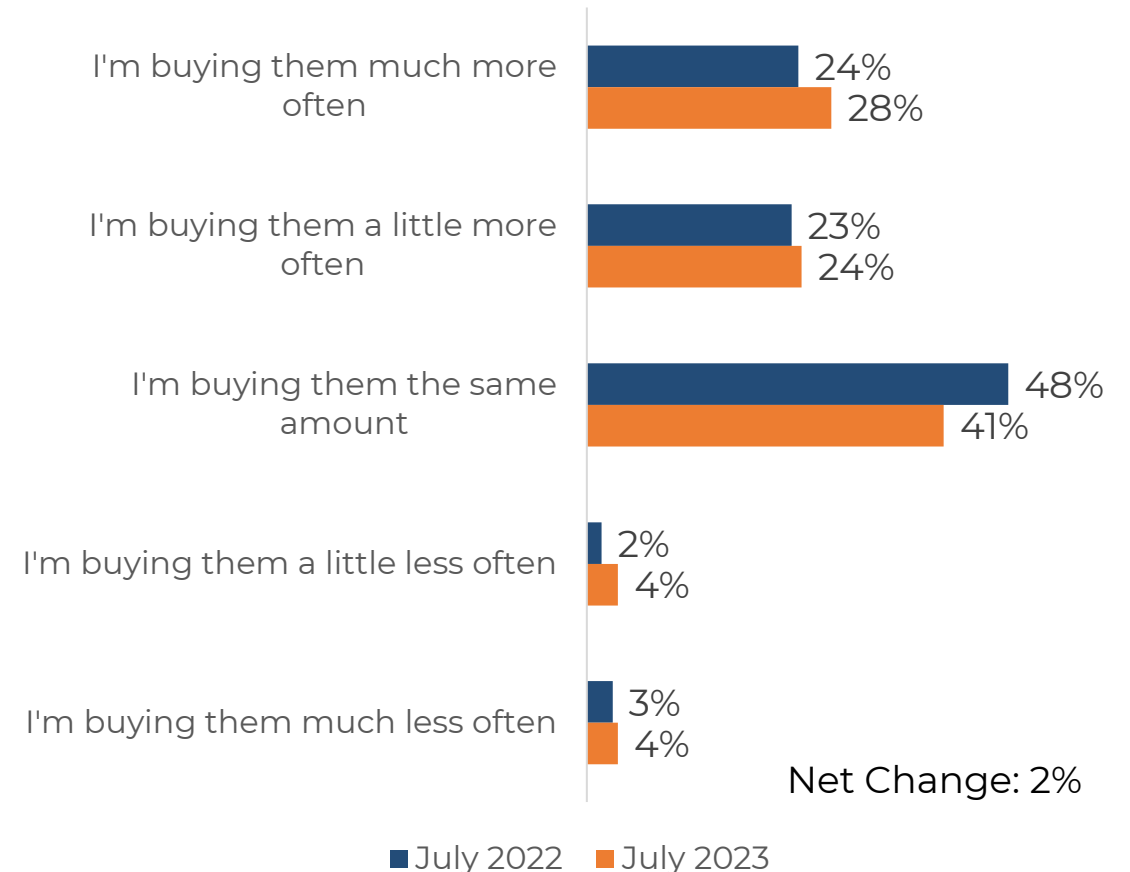
Which best describes your use of coupons or e-coupons for groceries in the last 3 months?



Consumers are buying more discounted products

- Overall, there is a 5% increase in Consumers buying more (much more/a little more) products near expiry/best before dates in 2023 (52%) vs 2022 (47%). The increase is greater for much often at (4%).
- There is a generational contrast. Millennials and Generation X are buying more for 2023 (55%) vs 2022 (51% and 47% respectively). More Generation Z are buying less for 2023 (12%) than they did in 2022 (3%).
- Regionally, there is a contrast as well. The Atlantic went up in 2023 (66%) vs 2022 (50%) vs the West which started buying less often in 2023 (9%) vs 2022 (3%).

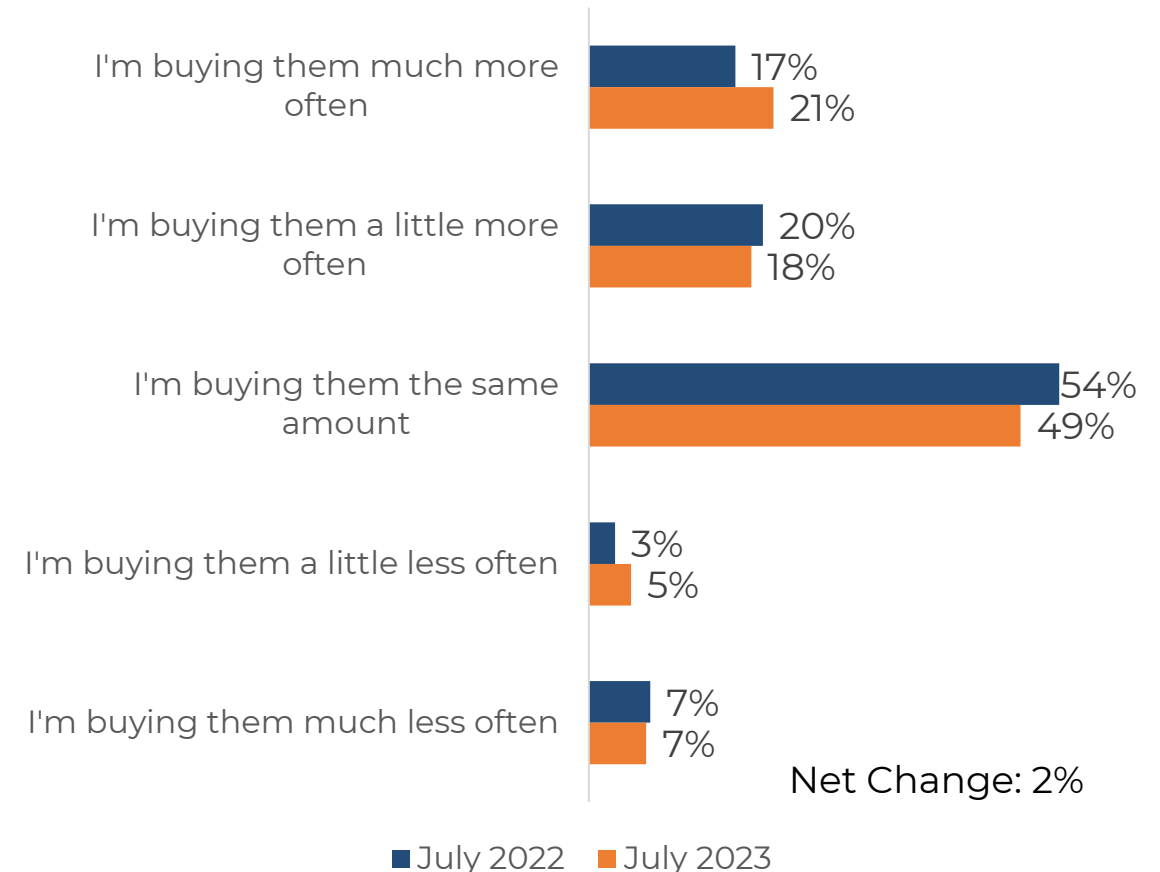
Which best describes your purchases of discounted products with expiry / best before dates within a few days of purchase in the last 3 months?



Consumers are buying more of 'Enjoy Tonight' products

- Similar to discounted products, there is a 4% increase in Consumers buying more (much more) 'Enjoy Tonight' products in 2023 (21%) vs 2022 (17%). However, those buying a little more have decreased.
- Millennials and Generation Z are buying the most for 2023 (44%). However, for Millennials, it is an increase from 2022 (42%) versus a drop for Gen Z from 20023 (46%).
- Regionally, there is a contrast as well. The Atlantic went up in 2023 (54%) vs 2022 (46%) vs the West which started buying less often in 2023 (15%) vs 2022 (8%).

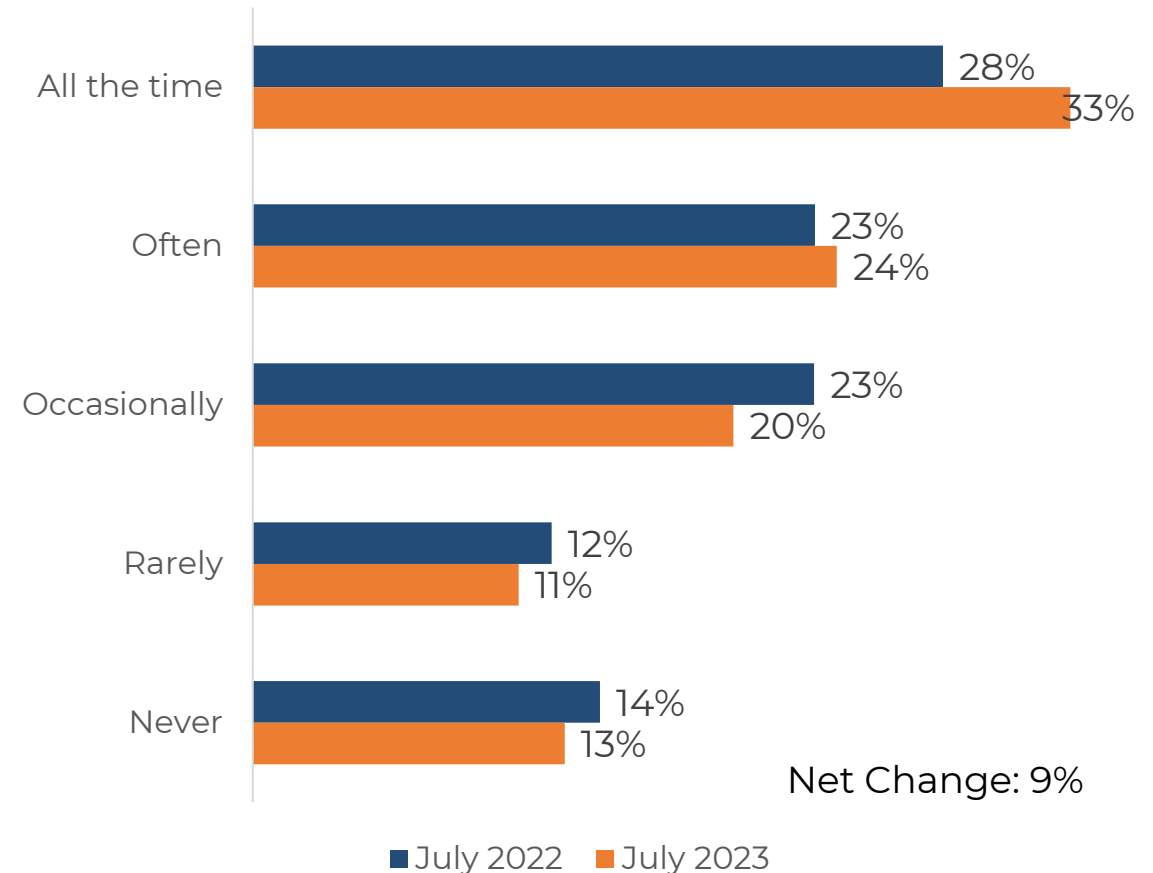
Which best describes your purchases of products labeled 'Enjoy Tonight' in the last 3 months?



Consumers are more than ever using their phone to check prices

- More consumers are using their phone to check prices (All the time/Often) in 2023 (57%) up from 2022 (51%) with one third using it all the time. In addition, those only using their phone rarely or never have dropped from 26% to 23%.
- The younger generations, Generation Z (72%) and Millennials (67%) are most likely in 2023 on a regular basis, up from 2022 (62% for both) with Generation Z having a 10% increase. Baby Boomers trail behind at (44%) but it still a notable jump of 7% from 2022 (37%).
- Ontario is the region with highest usage in 2023 (62%), up 7% from 2022 (55%).

Do you use your phone while in a store to check prices of similar products at other stores?



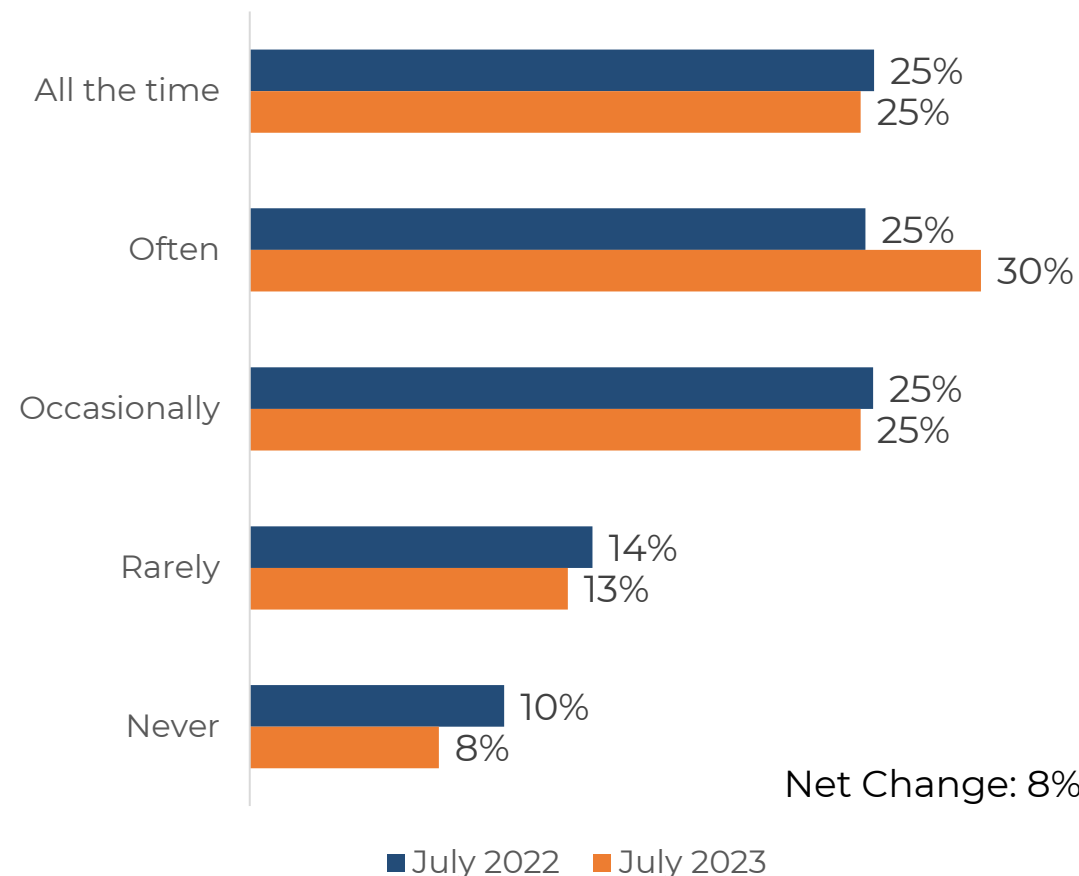
How Food Inflation Affects Spending Habits



More Consumers are following a budget than before

- Consumers who follow a budget when grocery shopping (all the time/often) has increased from 2022 (50%) to 2023 (55%). At the same time, those who don't budget (rarely/never) dropped from 2022 (24%) to 2023 (21%).
- Among the generations, Millennials are the most likely to follow a budget in 2023 (62%), an increase of 7% from 2022 (55%). The least budget conscious are the Baby Boomers, with the percentage minimal changed from 2022 (47%) to 2023 (48%).
- All regions in Canada saw an increase in budget following consumers with the highest in Ontario in 2023 (58%), a 7% increase from 2022 (51%).

Do you follow a budget when grocery shopping?



Unravelling the Impact of Food Prices



How Canadian consumers are perceiving and responding to food prices

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1	Food prices are still on the rise	»»	Despite a slight overall drop from 2022 and a deep drop in many categories, 90% of consumers still perceive food prices are on the rise overall.	
2	More Canadians are noticing shrinkflation	»»	Consumers are conscious of 'shrinkflation' more than ever, with increase as much as 9% for some categories compared to 2022.	
3	Consumers are taking action to increase value of \$ spent	»»	Moving to Private label brand purchases, Coupon Usage, "Enjoy Tonight" products and Price checking on their phone have all increased in 2023.	
4	Consumers are more budget conscious than before.	»»	Bringing a calculator, more consumers are on a budget, putting limits on their grocery spend.	

How Canadian consumers are perceiving and responding to food prices

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5	Buying more Private Label Brands	More consumers are buying private labels brands in 2023.	
6	Meat purchases continue to drop	More consumers than ever are reducing their meat purchases.	
7	Millennials have responded to the most to Inflation	Overall, Millennials have adjusted their consumer behaviour and spending habits more than any other group.	
8	Baby Boomers responded the least to Inflation	Baby Boomers aside from reducing their meat purchasing the most, are adjusted the least compared to other generations but in terms of change from 2022 to 2023 for behaviour (not spend) it is among the highest.	

Q&A Session: Addressing Your Queries and Insights



Want to dig into the data? Let's talk insights.



Contact Colleen.Martin@caddle.ca for details

Appendix

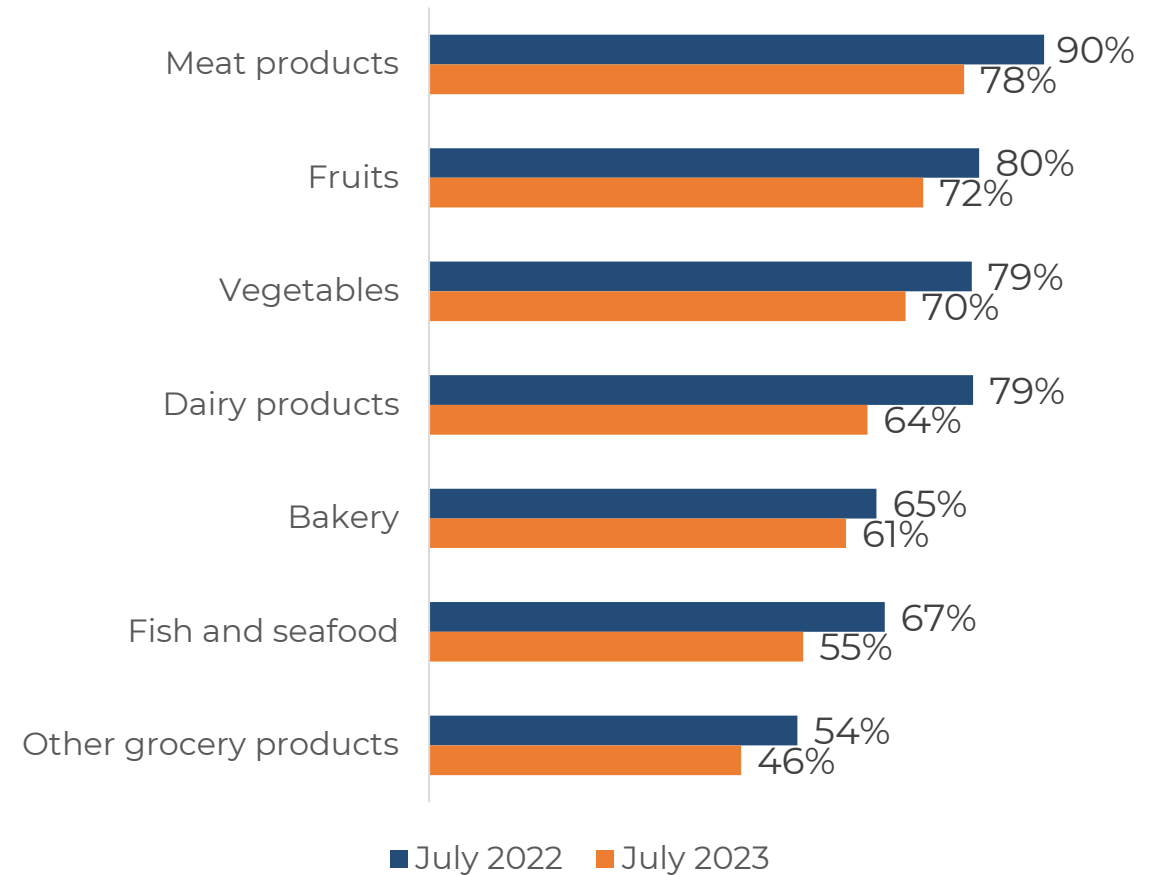
Introduction to Food Inflation: Understanding the Current Landscape



All categories dropped as being more expensive in the past 3 months

- There was a general reduction across categories when compared to 2022 with an average reduction of 10%
- More than half of consumers generally still think each category is higher priced. The most notable is meat, fruit and vegetables, with this trend carrying over since 2022.

In your view, what food categories are now more expensive than 3 months ago?



Sorted by total average of July 2022 and July 2023

Analyzing Consumer Behavior



How we analyzed Consumer Behavior and Spending Habits

To analyze the changes, we did a straightforward delta calculation looking at the difference between July 2023 vs July 2022.

Change % = July 2023 % – July 2022 %

For 5 pt scales, we also viewed the top 2 box and bottom 2 box scores to overall positive and negative scores. Example below:

I'm buying much more	21%	} Top 2 Box 47%
I'm buying a little	26%	
My purchases haven't changed	43%	
I'm buying a little less	5%	} Bottom 2 Box 10%
I'm buying much less	5%	

In addition, we looked at the Net Change % comparing the change % in Top 2 Box versus the change % in the Bottom 2 Box.

Net Change % = Overall Top 2 Box Change % – Overall Bottom 2 Box Change%

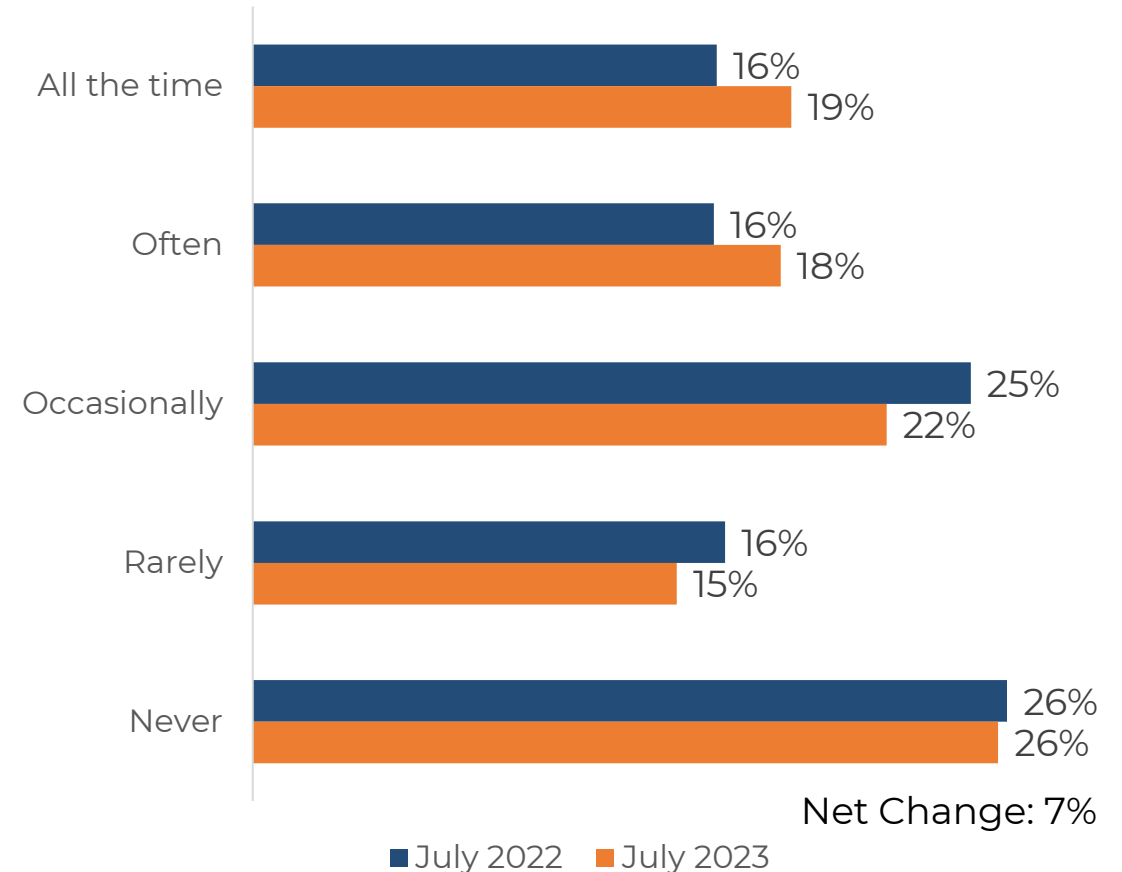
How Food Inflation Affects Spending Habits



Consumers have shifted to using a calculator more often

- Consumer who used their calculators regularly (all the time/often) when grocery shopping have increased in 2023 (37%) from 2022 (32%) while those who use a calculator less frequently have dropped.
- Generation Z (48%) and Millennials (46%) are most likely in 2023 on a regular basis. Baby Boomers at the least likely generation at (26%) but it still a significant increase of 7% from 2022 (19%).
- The Atlantic saw the highest regular usage (all the time/often) in 2023 (40%) with also the highest jump of 15% from 2022 (25%).

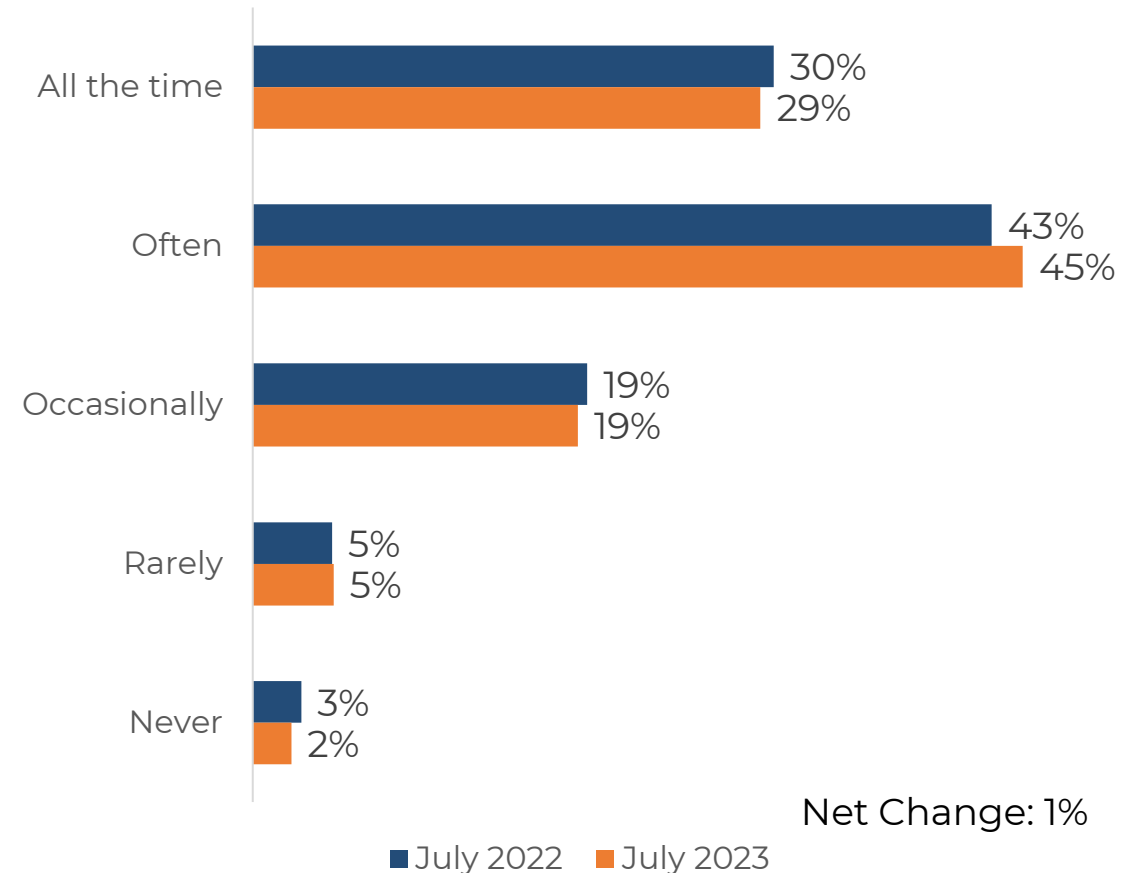
Do you use a calculator when grocery shopping?



Majority of Consumers still know how much they should be paying

- Overall, the majority of consumer still know how they should be paying (all the time/often) before visiting the grocery store in 2023 (74%) with a slight uptake from 2022 (73%)
- Generationally, the most aware are Baby Boomers (78%) and the least aware are Generation Z (69%) which experience a 7% drop from 2022 (76%). Millennials and Generation X were right on the average for 2023 (74%)

Do you typically know how much you should be paying for any food product before you visit the grocery store?



Unravelling the Impact of Food Prices



What is the Difference after a Year?

Cost Perception

- Although the perception of increasing prices have dampened from July 2022 to July 2023 marginally, 90% of consumers are still of the view that food prices are higher than 3 months ago.
- While less consumers have perceived increasing prices for individual grocery categories, more consumers have noticed Shrinkflation, a reduction in the size or quantity of products while the price remains the same, in every category. They understand they are getting less for the same price.
- Meat is still view as the category that is most increased in price the most (42%) despite an 8% difference from 2022 (50%), but Bakery items and Fruit however both moved up from 2022 by 4% points.
- It is important to remember that we are measuring the perception of increasing prices and it does not mean that consumers find grocery finding it less expensive.

What is the Difference after a Year?

Consumer Behavior and Purchasing Decisions

- In 2023, more consumers than before have changed their behaviour in response to high prices. There is higher awareness of price changes, increased reading of flyers and checking on their phone to compare prices to find the best deals.
- They are changing on what they spend, shifting over to private label brands, making use of coupons and discount offers. Expensive items such as meat, saw more consumers in 2023 (67%) reducing their purchases in the last 3 months compared to 2022 (58%). In contrast, consumer buying more private label brands, increased from 44% to 51% in the past year.
- More consumers are definitely taking action to get the most value of their grocery dollar.

What is the Difference after a Year?

Consumer Spending Habits and Budgeting

- What remains largely unchanged is the consumer's awareness of their shopping costs, with a significant majority (90%) indicating they are well aware of their spending.
- More consumers are also adjusting their spending habits, using a calculator and adhering to a budget in 2023 than 2022, marking a 5% increase. Majority of consumers know what they should be paying.
- In the face of less buying power, consumers are making some decisions on what they spend and being more careful on how much they spend. The impact been seen in the increased reduction of meat purchases and the increased drive toward private label brands.

Consumer Inflation Perception

Q1. Do you think food is more expensive than it was 3 months ago? (Yes)

Total		Male		Female		Gen Z (1997-2005)		Millennials (1981-1996)		Gen X (1965-1980)		Baby Boomers (1946-1964)	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
92%	90%	90%	87%	95%	93%	84%	86%	88%	89%	95%	92%	97%	90%

West + Territories		Ontario		Quebec		Atlantic	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
92%	91%	92%	89%	92%	87%	97%	98%

Greater Vancouver Area		Greater Edmonton Area		Greater Calgary Area		Greater Toronto Area		Greater Ottawa Area		Greater Montreal Area		Greater Halifax Area	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
87%	87%	95%	95%	97%	93%	89%	80%	95%	82%	92%	82%	98%	97%

Consumer Inflation Perception

Q2. In your view, what food categories are now more expensive than 3 months ago? (Please select all that apply)

	Total		Male		Female		Gen Z (1997-2005)		Millennials (1981-1996)		Gen X (1965-1980)		Baby Boomers (1946-1964)	
	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
Bakery	65%	61%	67%	59%	64%	63%	64%	52%	69%	62%	65%	63%	66%	61%
Fish and seafood	67%	55%	69%	52%	64%	57%	65%	49%	67%	55%	66%	58%	67%	54%
Meat products	90%	78%	90%	75%	90%	82%	82%	72%	88%	74%	91%	82%	93%	81%
Fruits	80%	72%	77%	67%	83%	77%	75%	57%	80%	72%	80%	75%	84%	74%
Vegetables	79%	70%	76%	64%	82%	75%	76%	64%	80%	68%	78%	72%	81%	70%
Dairy products	79%	64%	79%	60%	80%	68%	76%	56%	78%	62%	79%	66%	83%	66%
Other grocery products	54%	46%	53%	41%	55%	50%	50%	30%	55%	41%	54%	50%	55%	50%

Consumer Inflation Perception

Q2. In your view, what food categories are now more expensive than 3 months ago? (Please select all that apply)

	West + Territories		Ontario		Quebec		Atlantic	
	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
Bakery	68%	62%	63%	61%	64%	57%	73%	69%
Fish and seafood	65%	55%	68%	55%	63%	50%	78%	71%
Meat products	91%	83%	89%	77%	90%	71%	95%	90%
Fruits	82%	79%	82%	69%	74%	67%	87%	79%
Vegetables	81%	78%	81%	67%	71%	63%	87%	74%
Dairy products	79%	64%	82%	66%	75%	59%	80%	73%
Other grocery products	56%	47%	54%	46%	47%	39%	64%	61%

Consumer Inflation Perception

Q2. In your view, what food categories are now more expensive than 3 months ago? (Please select all that apply)

	Greater Vancouver Area		Greater Edmonton Area		Greater Calgary Area		Greater Toronto Area		Greater Ottawa Area		Greater Montreal Area		Greater Halifax Area	
	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
Bakery	64%	57%	67%	59%	67%	65%	63%	52%	72%	55%	64%	58%	63%	54%
Fish and seafood	60%	55%	62%	60%	64%	52%	66%	52%	76%	54%	67%	49%	79%	69%
Meat products	86%	79%	85%	91%	94%	80%	92%	66%	93%	74%	91%	71%	88%	78%
Fruits	75%	71%	80%	76%	88%	81%	79%	57%	91%	71%	77%	62%	77%	56%
Vegetables	69%	71%	90%	82%	83%	79%	76%	59%	85%	61%	75%	60%	76%	56%
Dairy products	74%	60%	75%	67%	80%	67%	78%	55%	85%	60%	79%	57%	66%	69%
Other grocery products	42%	42%	64%	51%	53%	52%	50%	33%	59%	50%	52%	39%	78%	68%

Consumer Inflation Perception

Q3. In your view, what is the ONE food category which has increased the MOST in the last 3 months?

	Total		Male		Female		Gen Z (1997-2005)		Millennials (1981-1996)		Gen X (1965-1980)		Baby Boomers (1946-1964)	
	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
Bakery	5%	9%	5%	11%	4%	7%	8%	9%	5%	9%	5%	8%	3%	9%
Fish and seafood	6%	5%	6%	5%	5%	4%	7%	8%	6%	5%	5%	4%	6%	4%
Meat products	50%	42%	51%	41%	49%	44%	45%	45%	43%	40%	53%	42%	56%	43%
Fruits	8%	13%	8%	12%	8%	14%	7%	15%	12%	14%	9%	11%	4%	13%
Vegetables	11%	13%	11%	12%	10%	13%	11%	9%	11%	13%	9%	16%	12%	11%
Dairy products	14%	11%	14%	12%	15%	10%	20%	6%	15%	11%	13%	10%	12%	13%
Other grocery products	6%	8%	5%	7%	8%	9%	2%	8%	8%	8%	7%	8%	6%	7%

Consumer Inflation Perception

Q3. In your view, what is the ONE food category which has increased the MOST in the last 3 months?

	West + Territories		Ontario		Quebec		Atlantic	
	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
Bakery	6%	8%	4%	7%	6%	13%	3%	7%
Fish and seafood	4%	3%	6%	5%	5%	5%	13%	8%
Meat products	52%	46%	48%	42%	51%	40%	54%	36%
Fruits	11%	15%	7%	11%	7%	14%	3%	11%
Vegetables	12%	15%	11%	12%	8%	11%	7%	13%
Dairy products	10%	7%	18%	15%	16%	9%	6%	8%
Other grocery products	5%	7%	6%	7%	5%	7%	14%	17%

Consumer Inflation Perception

Q3. In your view, what is the ONE food category which has increased the MOST in the last 3 months?

	Greater Vancouver Area		Greater Edmonton Area		Greater Calgary Area		Greater Toronto Area		Greater Ottawa Area		Greater Montreal Area		Greater Halifax Area	
	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
Bakery	9%	6%	2%	6%	9%	10%	5%	12%	5%	5%	6%	13%	2%	2%
Fish and seafood	5%	6%	10%	2%	4%	1%	4%	5%	10%	6%	3%	2%	18%	17%
Meat products	54%	44%	47%	65%	53%	43%	53%	39%	55%	39%	53%	42%	41%	27%
Fruits	9%	16%	5%	9%	20%	14%	8%	12%	5%	17%	6%	12%	6%	8%
Vegetables	10%	14%	22%	6%	10%	20%	10%	10%	10%	16%	11%	8%	20%	10%
Dairy products	10%	6%	8%	8%	2%	6%	16%	11%	6%	12%	16%	15%	1%	15%
Other grocery products	3%	7%	5%	4%	2%	6%	4%	10%	9%	5%	5%	7%	12%	21%

Consumer Behavior

Q4. Have you reduced your meat purchases in the last 3 months due to higher prices? (Yes)

Total		Male		Female		Gen Z (1997-2005)		Millennials (1981-1996)		Gen X (1965-1980)		Baby Boomers (1946-1964)	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
58%	67%	57%	66%	60%	68%	51%	63%	61%	66%	59%	65%	61%	71%

West + Territories		Ontario		Quebec		Atlantic	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
64%	69%	58%	68%	52%	61%	58%	68%

Greater Vancouver Area		Greater Edmonton Area		Greater Calgary Area		Greater Toronto Area		Greater Ottawa Area		Greater Montreal Area		Greater Halifax Area	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
66%	65%	65%	71%	65%	78%	53%	62%	66%	72%	48%	55%	55%	52%

Consumer Behavior

Q5. Which best describes your purchases of grocery store brands / private labels (instead of National brands) in the last 3 months? (T2B)

Total		Male		Female		Gen Z (1997-2005)		Millennials (1981-1996)		Gen X (1965-1980)		Baby Boomers (1946-1964)	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
44%	51%	44%	51%	44%	51%	63%	55%	49%	54%	44%	51%	36%	47%

West + Territories		Ontario		Quebec		Atlantic	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
50%	50%	44%	52%	37%	48%	43%	59%

Greater Vancouver Area		Greater Edmonton Area		Greater Calgary Area		Greater Toronto Area		Greater Ottawa Area		Greater Montreal Area		Greater Halifax Area	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
64%	44%	48%	50%	40%	57%	46%	49%	49%	49%	30%	51%	52%	57%

Consumer Behavior

Q6. Which best describes your use of weekly grocery flyers for deals and savings in the last 3 months? (T2B)

Total		Male		Female		Gen Z (1997-2005)		Millennials (1981-1996)		Gen X (1965-1980)		Baby Boomers (1946-1964)	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
49%	56%	50%	55%	49%	58%	58%	59%	54%	61%	49%	55%	44%	53%

West + Territories		Ontario		Quebec		Atlantic	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
54%	54%	51%	60%	40%	51%	46%	63%

Greater Vancouver Area		Greater Edmonton Area		Greater Calgary Area		Greater Toronto Area		Greater Ottawa Area		Greater Montreal Area		Greater Halifax Area	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
63%	46%	54%	55%	52%	67%	43%	54%	57%	58%	36%	52%	44%	65%

Consumer Behavior

Q7. Which best describes your use of coupons or e-coupons for groceries in the last 3 months? (T2B)

Total		Male		Female		Gen Z (1997-2005)		Millennials (1981-1996)		Gen X (1965-1980)		Baby Boomers (1946-1964)	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
48%	53%	47%	53%	49%	52%	58%	58%	52%	59%	45%	50%	44%	48%

West + Territories		Ontario		Quebec		Atlantic	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
50%	51%	50%	57%	43%	48%	38%	53%

Greater Vancouver Area		Greater Edmonton Area		Greater Calgary Area		Greater Toronto Area		Greater Ottawa Area		Greater Montreal Area		Greater Halifax Area	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
62%	51%	51%	48%	47%	59%	43%	57%	52%	54%	36%	49%	41%	60%

Consumer Behavior

Q8. Which best describes your purchases of discounted products with expiry / best before dates within a few days of purchase in the last 3 months? (T2B)

Total		Male		Female		Gen Z (1997-2005)		Millennials (1981-1996)		Gen X (1965-1980)		Baby Boomers (1946-1964)	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
47%	52%	48%	53%	47%	52%	56%	51%	51%	55%	47%	55%	43%	48%

West + Territories		Ontario		Quebec		Atlantic	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
51%	47%	47%	56%	43%	49%	50%	66%

Greater Vancouver Area		Greater Edmonton Area		Greater Calgary Area		Greater Toronto Area		Greater Ottawa Area		Greater Montreal Area		Greater Halifax Area	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
56%	40%	53%	45%	43%	61%	47%	49%	57%	56%	38%	46%	44%	71%

Consumer Behavior

Q9. Which best describes your purchases of products labeled 'Enjoy Tonight' in the last 3 months? (T2B)

Total		Male		Female		Gen Z (1997-2005)		Millennials (1981-1996)		Gen X (1965-1980)		Baby Boomers (1946-1964)	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
36%	40%	37%	41%	36%	38%	46%	44%	42%	44%	37%	42%	30%	33%

West + Territories		Ontario		Quebec		Atlantic	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
36%	34%	38%	44%	31%	35%	46%	54%

Greater Vancouver Area		Greater Edmonton Area		Greater Calgary Area		Greater Toronto Area		Greater Ottawa Area		Greater Montreal Area		Greater Halifax Area	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
45%	34%	29%	37%	32%	39%	43%	44%	51%	48%	28%	29%	42%	55%

Consumer Behavior

Q10. Do you use your phone while in a store to check prices of similar products at other stores? (T2B)

Total		Male		Female		Gen Z (1997-2005)		Millennials (1981-1996)		Gen X (1965-1980)		Baby Boomers (1946-1964)	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
51%	57%	52%	56%	50%	58%	62%	72%	62%	67%	53%	56%	37%	44%

West + Territories		Ontario		Quebec		Atlantic	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
48%	52%	55%	62%	47%	54%	45%	59%

Greater Vancouver Area		Greater Edmonton Area		Greater Calgary Area		Greater Toronto Area		Greater Ottawa Area		Greater Montreal Area		Greater Halifax Area	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
52%	50%	60%	54%	32%	56%	52%	59%	50%	67%	41%	51%	42%	66%

Consumer Spending Habits

Q11. Do you use a calculator when grocery shopping? (TB)

Total		Male		Female		Gen Z (1997-2005)		Millennials (1981-1996)		Gen X (1965-1980)		Baby Boomers (1946-1964)	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
16%	19%	18%	19%	15%	19%	29%	22%	23%	26%	15%	20%	7%	10%

West + Territories		Ontario		Quebec		Atlantic	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
19%	18%	16%	22%	15%	15%	10%	18%

Greater Vancouver Area		Greater Edmonton Area		Greater Calgary Area		Greater Toronto Area		Greater Ottawa Area		Greater Montreal Area		Greater Halifax Area	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
26%	19%	12%	18%	12%	20%	19%	27%	20%	22%	11%	16%	1%	10%

Consumer Spending Habits

Q11. Do you use a calculator when grocery shopping? (T2B)

Total		Male		Female		Gen Z (1997-2005)		Millennials (1981-1996)		Gen X (1965-1980)		Baby Boomers (1946-1964)	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
32%	37%	34%	39%	31%	36%	48%	48%	41%	46%	33%	36%	19%	26%

West + Territories		Ontario		Quebec		Atlantic	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
37%	38%	32%	39%	29%	31%	25%	40%

Greater Vancouver Area		Greater Edmonton Area		Greater Calgary Area		Greater Toronto Area		Greater Ottawa Area		Greater Montreal Area		Greater Halifax Area	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
44%	40%	48%	44%	31%	40%	32%	43%	36%	35%	23%	32%	10%	30%

Consumer Spending Habits

Q11. Do you use a calculator when grocery shopping? (T3B)

Total		Male		Female		Gen Z (1997-2005)		Millennials (1981-1996)		Gen X (1965-1980)		Baby Boomers (1946-1964)	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
57%	59%	59%	61%	56%	58%	86%	72%	66%	70%	57%	56%	41%	48%

West + Territories		Ontario		Quebec		Atlantic	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
62%	60%	59%	62%	51%	53%	49%	60%

Greater Vancouver Area		Greater Edmonton Area		Greater Calgary Area		Greater Toronto Area		Greater Ottawa Area		Greater Montreal Area		Greater Halifax Area	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
78%	65%	67%	71%	62%	63%	67%	68%	54%	63%	45%	49%	51%	53%

Consumer Spending Habits

Q11. Do you use a calculator when grocery shopping?

	Total		Male		Female		Gen Z (1997-2005)		Millennials (1981-1996)		Gen X (1965-1980)		Baby Boomers (1946-1964)	
	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
Top Box	16%	19%	18%	19%	15%	19%	29%	22%	23%	26%	15%	20%	7%	10%
Top 2 Box	32%	37%	34%	39%	31%	36%	48%	48%	41%	46%	33%	36%	19%	26%
Top 3 Box	57%	59%	59%	61%	56%	58%	86%	72%	66%	70%	57%	56%	41%	48%

Consumer Spending Habits

Q11. Do you use a calculator when grocery shopping?

	West + Territories		Ontario		Quebec		Atlantic	
	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
Top Box	19%	18%	16%	22%	15%	15%	10%	18%
Top 2 Box	37%	38%	32%	39%	29%	31%	25%	40%
Top 3 Box	62%	60%	59%	62%	51%	53%	49%	60%

Consumer Spending Habits

Q11. Do you use a calculator when grocery shopping?

	Greater Vancouver Area		Greater Edmonton Area		Greater Calgary Area		Greater Toronto Area		Greater Ottawa Area		Greater Montreal Area		Greater Halifax Area	
	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
Top Box	26%	19%	12%	18%	12%	20%	19%	27%	20%	22%	11%	16%	1%	10%
Top 2 Box	44%	40%	48%	44%	31%	40%	32%	43%	36%	35%	23%	32%	10%	30%
Top 3 Box	78%	65%	67%	71%	62%	63%	67%	68%	54%	63%	45%	49%	51%	53%

Consumer Spending Habits

Q12. Do you typically know how much you should be paying for any food product before you visit the grocery store?
(TB)

Total		Male		Female		Gen Z (1997-2005)		Millennials (1981-1996)		Gen X (1965-1980)		Baby Boomers (1946-1964)	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
30%	29%	30%	30%	30%	29%	35%	27%	29%	30%	28%	31%	32%	29%

West + Territories		Ontario		Quebec		Atlantic	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
26%	26%	34%	31%	30%	30%	29%	34%

Greater Vancouver Area		Greater Edmonton Area		Greater Calgary Area		Greater Toronto Area		Greater Ottawa Area		Greater Montreal Area		Greater Halifax Area	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
23%	26%	23%	28%	20%	23%	28%	27%	37%	26%	27%	31%	29%	21%

Consumer Spending Habits

Q12. Do you typically know how much you should be paying for any food product before you visit the grocery store?
(T2B)

Total		Male		Female		Gen Z (1997-2005)		Millennials (1981-1996)		Gen X (1965-1980)		Baby Boomers (1946-1964)	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
73%	74%	73%	74%	73%	74%	76%	69%	69%	74%	71%	74%	78%	78%

West + Territories		Ontario		Quebec		Atlantic	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
73%	73%	73%	74%	74%	74%	75%	79%

Greater Vancouver Area		Greater Edmonton Area		Greater Calgary Area		Greater Toronto Area		Greater Ottawa Area		Greater Montreal Area		Greater Halifax Area	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
78%	70%	70%	76%	55%	79%	70%	69%	83%	72%	70%	76%	71%	77%

Consumer Spending Habits

Q12. Do you typically know how much you should be paying for any food product before you visit the grocery store?
(T3B)

Total		Male		Female		Gen Z (1997-2005)		Millennials (1981-1996)		Gen X (1965-1980)		Baby Boomers (1946-1964)	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
93%	93%	91%	93%	94%	93%	90%	92%	92%	93%	92%	92%	94%	95%

West + Territories		Ontario		Quebec		Atlantic	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
93%	92%	92%	93%	93%	94%	95%	92%

Greater Vancouver Area		Greater Edmonton Area		Greater Calgary Area		Greater Toronto Area		Greater Ottawa Area		Greater Montreal Area		Greater Halifax Area	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
92%	89%	95%	92%	85%	93%	94%	91%	94%	93%	91%	93%	98%	85%

Consumer Spending Habits

Q12. Do you typically know how much you should be paying for any food product before you visit the grocery store?

	Total		Male		Female		Gen Z (1997-2005)		Millennials (1981-1996)		Gen X (1965-1980)		Baby Boomers (1946-1964)	
	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
Top Box	30%	29%	30%	30%	30%	29%	35%	27%	29%	30%	28%	31%	32%	29%
Top 2 Box	73%	74%	73%	74%	73%	74%	76%	69%	69%	74%	71%	74%	78%	78%
Top 3 Box	93%	93%	91%	93%	94%	93%	90%	92%	92%	93%	92%	92%	94%	95%



Consumer Spending Habits

Q12. Do you typically know how much you should be paying for any food product before you visit the grocery store?

	West + Territories		Ontario		Quebec		Atlantic	
	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
Top Box	26%	26%	34%	31%	30%	30%	29%	34%
Top 2 Box	73%	73%	73%	74%	74%	74%	75%	79%
Top 3 Box	93%	92%	92%	93%	93%	94%	95%	92%

Consumer Spending Habits

Q13. Do you follow a budget when grocery shopping? (TB)

Total		Male		Female		Gen Z (1997-2005)		Millennials (1981-1996)		Gen X (1965-1980)		Baby Boomers (1946-1964)	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
25%	25%	25%	25%	25%	25%	35%	28%	26%	28%	21%	25%	26%	21%

West + Territories		Ontario		Quebec		Atlantic	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
24%	21%	26%	27%	26%	26%	25%	27%

Greater Vancouver Area		Greater Edmonton Area		Greater Calgary Area		Greater Toronto Area		Greater Ottawa Area		Greater Montreal Area		Greater Halifax Area	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
26%	19%	29%	27%	20%	17%	25%	25%	23%	27%	22%	22%	8%	16%

Consumer Spending Habits

Q13. Do you follow a budget when grocery shopping? (T2B)

Total		Male		Female		Gen Z (1997-2005)		Millennials (1981-1996)		Gen X (1965-1980)		Baby Boomers (1946-1964)	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
50%	55%	50%	54%	51%	55%	59%	55%	55%	62%	49%	55%	47%	48%

West + Territories		Ontario		Quebec		Atlantic	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
53%	55%	51%	58%	45%	48%	52%	54%

Greater Vancouver Area		Greater Edmonton Area		Greater Calgary Area		Greater Toronto Area		Greater Ottawa Area		Greater Montreal Area		Greater Halifax Area	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
57%	52%	63%	72%	41%	59%	46%	55%	57%	54%	36%	43%	36%	34%

Consumer Spending Habits

Q13. Do you follow a budget when grocery shopping? (T3B)

Total		Male		Female		Gen Z (1997-2005)		Millennials (1981-1996)		Gen X (1965-1980)		Baby Boomers (1946-1964)	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
76%	79%	73%	79%	78%	80%	83%	82%	79%	85%	76%	80%	72%	75%

West + Territories		Ontario		Quebec		Atlantic	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
80%	83%	76%	80%	69%	72%	76%	84%

Greater Vancouver Area		Greater Edmonton Area		Greater Calgary Area		Greater Toronto Area		Greater Ottawa Area		Greater Montreal Area		Greater Halifax Area	
July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
85%	79%	83%	87%	75%	92%	79%	76%	75%	79%	65%	65%	58%	70%

Consumer Spending Habits

Q13. Do you follow a budget when grocery shopping?

	Total		Male		Female		Gen Z (1997-2005)		Millennials (1981-1996)		Gen X (1965-1980)		Baby Boomers (1946-1964)	
	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
Top Box	25%	25%	25%	25%	25%	25%	35%	28%	26%	28%	21%	25%	26%	21%
Top 2 Box	50%	55%	50%	54%	51%	55%	59%	55%	55%	62%	49%	55%	47%	48%
Top 3 Box	76%	79%	73%	79%	78%	80%	83%	82%	79%	85%	76%	80%	72%	75%

Consumer Spending Habits

Q13. Do you follow a budget when grocery shopping?

	West + Territories		Ontario		Quebec		Atlantic	
	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
Top Box	24%	21%	26%	27%	26%	26%	25%	27%
Top 2 Box	53%	55%	51%	58%	45%	48%	52%	54%
Top 3 Box	80%	83%	76%	80%	69%	72%	76%	84%

Consumer Spending Habits

Q13. Do you follow a budget when grocery shopping?

	Greater Vancouver Area		Greater Edmonton Area		Greater Calgary Area		Greater Toronto Area		Greater Ottawa Area		Greater Montreal Area		Greater Halifax Area	
	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
Top Box	26%	19%	29%	27%	20%	17%	25%	25%	23%	27%	22%	22%	8%	16%
Top 2 Box	57%	52%	63%	72%	41%	59%	46%	55%	57%	54%	36%	43%	36%	34%
Top 3 Box	85%	79%	83%	87%	75%	92%	79%	76%	75%	79%	65%	65%	58%	70%

Consumer Inflation Perception

Q14. Have you noticed a reduction in product size / volume / quantity for a similar price from 3 months ago in any of the following categories?

	Total		Male		Female		Gen Z (1997-2005)		Millennials (1981-1996)		Gen X (1965-1980)		Baby Boomers (1946-1964)	
	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
With bakery products	39%	44%	40%	40%	37%	48%	39%	36%	41%	47%	36%	46%	39%	43%
With fish and seafood	22%	28%	24%	30%	20%	27%	23%	29%	26%	30%	19%	28%	21%	28%
With meat products	29%	38%	24%	38%	34%	39%	28%	42%	31%	38%	29%	38%	27%	38%
With fruits	20%	29%	19%	27%	21%	31%	19%	23%	24%	29%	19%	28%	19%	33%
With vegetables	20%	26%	19%	23%	21%	29%	16%	23%	23%	27%	19%	25%	19%	29%
With dairy products	30%	34%	30%	30%	30%	37%	17%	24%	28%	32%	29%	35%	37%	38%
Other grocery products	51%	50%	48%	46%	55%	54%	45%	30%	43%	45%	50%	54%	62%	58%
I haven't noticed this in any of these categories	17%	15%	19%	15%	15%	15%	11%	18%	18%	14%	18%	15%	16%	15%

Consumer Inflation Perception

Q14. Have you noticed a reduction in product size / volume / quantity for a similar price from 3 months ago in any of the following categories?

	West + Territories		Ontario		Quebec		Atlantic	
	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
With bakery products	41%	45%	41%	49%	32%	36%	34%	37%
With fish and seafood	25%	34%	22%	29%	18%	21%	17%	27%
With meat products	30%	44%	32%	38%	22%	32%	32%	38%
With fruits	23%	33%	20%	28%	14%	24%	24%	32%
With vegetables	20%	31%	21%	27%	17%	20%	22%	22%
With dairy products	27%	36%	33%	34%	27%	29%	31%	37%
Other grocery products	50%	55%	54%	50%	44%	41%	65%	62%
I haven't noticed this in any of these categories	17%	14%	15%	14%	21%	19%	14%	13%

Consumer Inflation Perception

Q14. Have you noticed a reduction in product size / volume / quantity for a similar price from 3 months ago in any of the following categories?

	Greater Vancouver Area		Greater Edmonton Area		Greater Calgary Area		Greater Toronto Area		Greater Ottawa Area		Greater Montreal Area		Greater Halifax Area	
	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023	July 2022	July 2023
With bakery products	46%	38%	27%	42%	33%	51%	35%	46%	54%	40%	29%	33%	12%	37%
With fish and seafood	31%	34%	19%	30%	19%	38%	15%	33%	47%	25%	13%	22%	8%	26%
With meat products	24%	35%	32%	53%	36%	44%	31%	37%	37%	26%	20%	32%	23%	13%
With fruits	23%	25%	19%	32%	22%	38%	15%	24%	12%	24%	11%	17%	12%	17%
With vegetables	19%	27%	20%	37%	22%	32%	12%	23%	22%	22%	15%	13%	13%	15%
With dairy products	21%	29%	26%	38%	25%	42%	23%	30%	45%	29%	27%	25%	21%	40%
Other grocery products	43%	50%	52%	49%	51%	59%	40%	44%	55%	50%	45%	44%	69%	67%
I haven't noticed this in any of these categories	13%	15%	25%	10%	8%	11%	21%	11%	14%	20%	24%	17%	15%	8%