



Back To School 2023 Shopping in Canada Survey | National Consumer Research – Caddle & RCC

Almost two – thirds of Canadians (66%) make a dedicated trip to buy Back to School items



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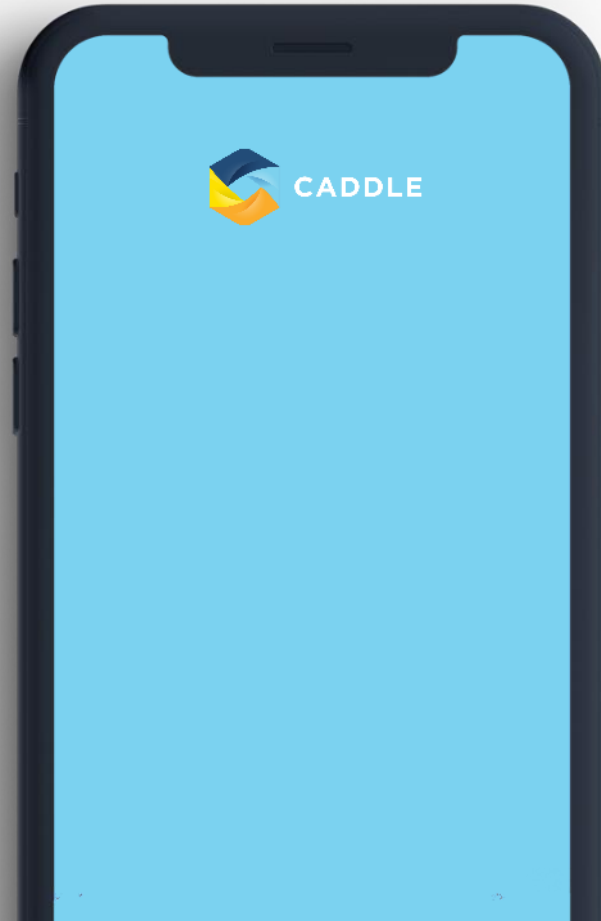


Methodology

Caddle, in partnership with the Retail Council of Canada (RCC), surveyed Canadians from coast to coast to better understand consumers' shopping intentions around the Canada Day holiday.

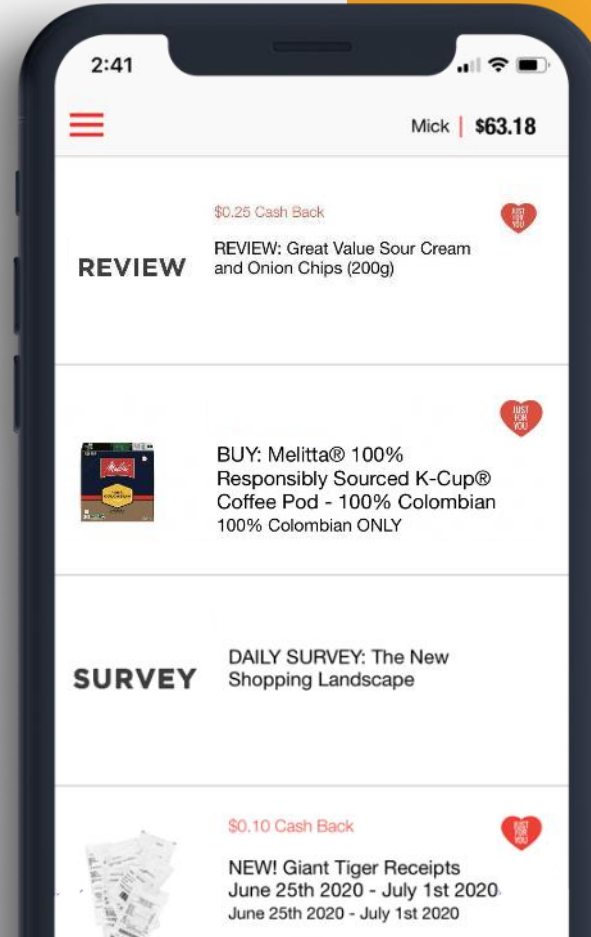
Surveys were conducted in July 2023 using Caddle's mobile platform and online panel amongst a representative randomized sample of $n=9,165$ and $n=9,848$ Canadian adults.

All data presented is owned by Caddle and has a Margin of Error of 1% or lower. The survey was self-commissioned and paid for by Caddle, Inc.



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.



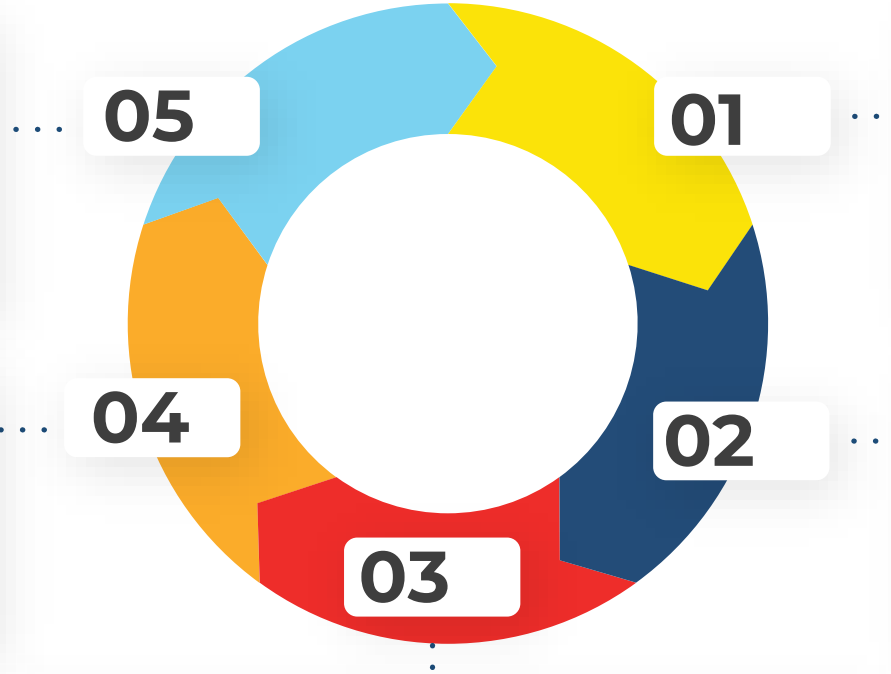
Key Findings on Back to School

Where Are Canadians Shopping for Back to School?

Big Box retailers (62.3%) take the biggest share of Canadian's wallets for Back to School shopping.

What Are Canadians Buying for Back to School?

Stationery (60.8%) and clothing (54.2%) are the top spending category for Back to School.



Participates in Back to School shopping?

Almost 2/3rds (66%) of Canadians make a dedicated trip to purchase Back to School items, whereas in 2022 only 32.7% did.

Shopping locally instead of online this year?

81% of Canadians intend to shop at a brick-and-mortar retailer in their neighborhood instead of purchasing their Back to School items online.

How Much Are Canadians Spending for Back to School?

About 73% of Canadians who plan to make Back to School purchases plan to spend more than \$50.

Key Takeaway 1 for Back to School

People are spending carefully

3.4%

The number of people planning to spend less than \$50 has gone up by 3.4% compared to 2022. They are planning to spend more proportionately on lower priced items – like supplies and stationery – and defer on higher priced items like furniture.

Key Takeaway 2 for Back to School

Planned purchases (2-4 weeks in advance) are being deferred

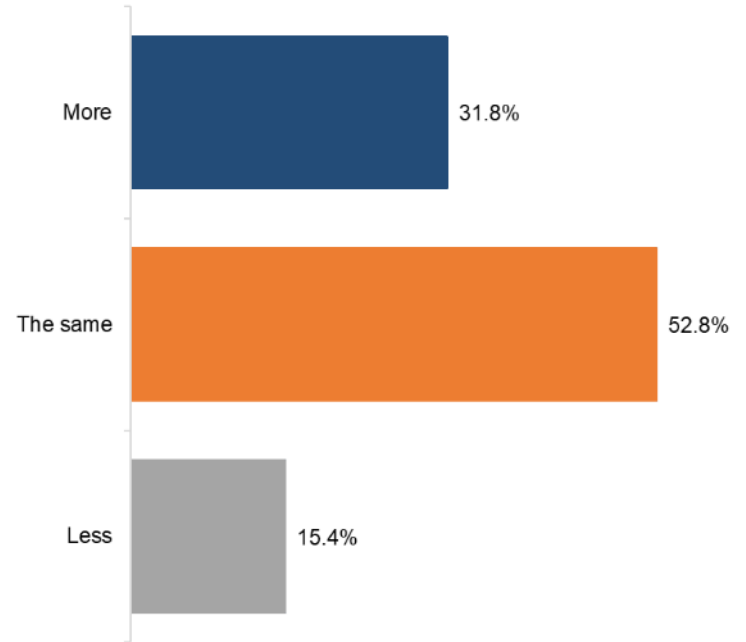
29.5%

While consumers still definitely plan their Back to School purchases, in 2023, they will buy closer to the beginning of school, 29.5% will buy 2-4 weeks before vs 42.9% in 2022. The impact on spending for Back to School from COVID – that was likely still experienced last year (more on clothing, planning to buy earlier due to out of stocks, crowding concerns) – has likely normalized.

About 1 in 2 Canadians expect to spend the same this year as they did in 2022 for Back to School-related purchases

- 84.6% of Canadians expect to spend the same or more amount of money on Back to School as they did last year.
- The percentage of people willing to spend more (31.8%) has decreased by 4.4% compared to 2022 (36.2%). Similarly, the percentage of people spending less has increased by 1.7% in 2023.

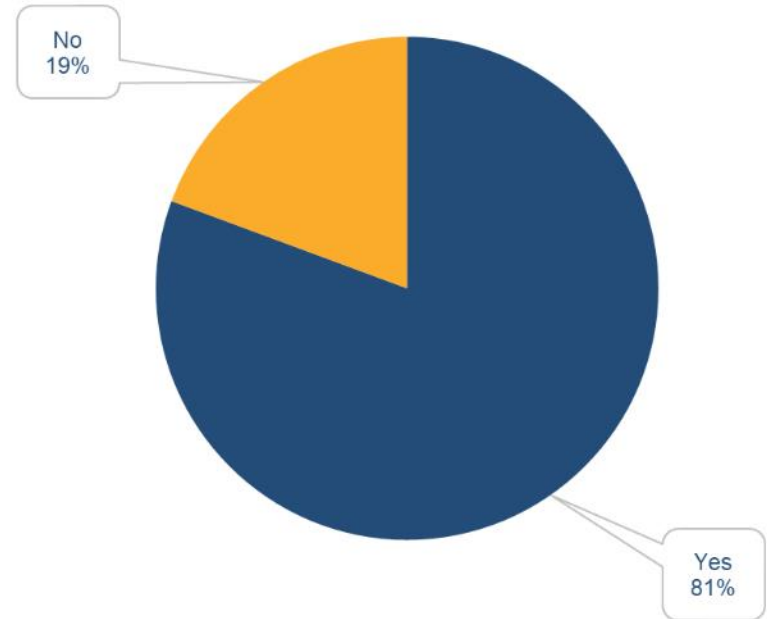
Would you expect to spend more or less for Back to School this year compared to last year?



An overwhelming majority (81%) are preferring to shop in person at a brick-and-mortar store instead of online for their Back to School purchases

- This year only 19% of Canadians will shop online for Back to School.
- Canadians are more willing to shop in person because the threat of COVID-19 has significantly decreased.
- Double the amount of Canadians plan to shop in-person in 2023, compared to 2022 with only 41%.

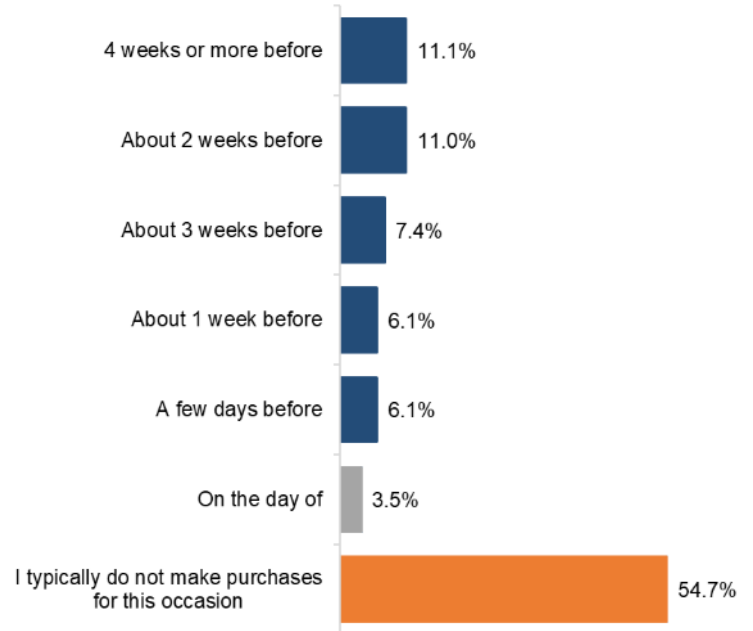
Would you like to shop locally in-person instead of online this year for Back to School?



Back to School is a planned purchase

- In 2023, 29.5% - the largest group – plan to purchase 2-4 weeks before schools begin vs 42.9% in 2022. This could be due to out of stocks and supply chain issues, which prevailed last year, are no longer a significant concern.
- 15.7% of Canadians will start purchasing Back to School products about 1 week or less before school begins.

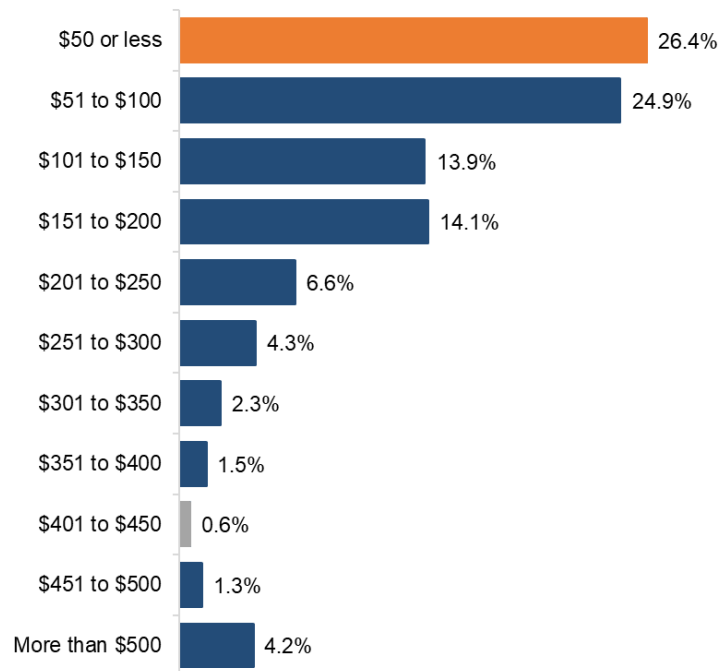
How far in advance do you start making your purchases related to Back to School?



About three – fourths of Canadians (73.6%) plan to spend more than \$50 on Back to School

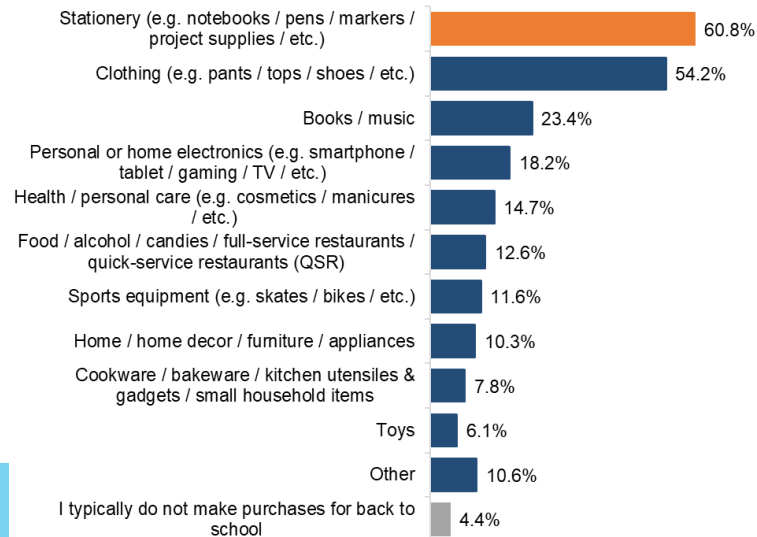
- 26.4% of Canadians spend \$50 or less on Back to School.
- The number of people planning to spend less than \$50 has gone up by 3.4% compared to 2022. This indicates the tightening of purse strings due to the prevailing economic conditions.

How much do you typically spend in total for Back to School?



Stationery is the No.1 spending category for going Back to School

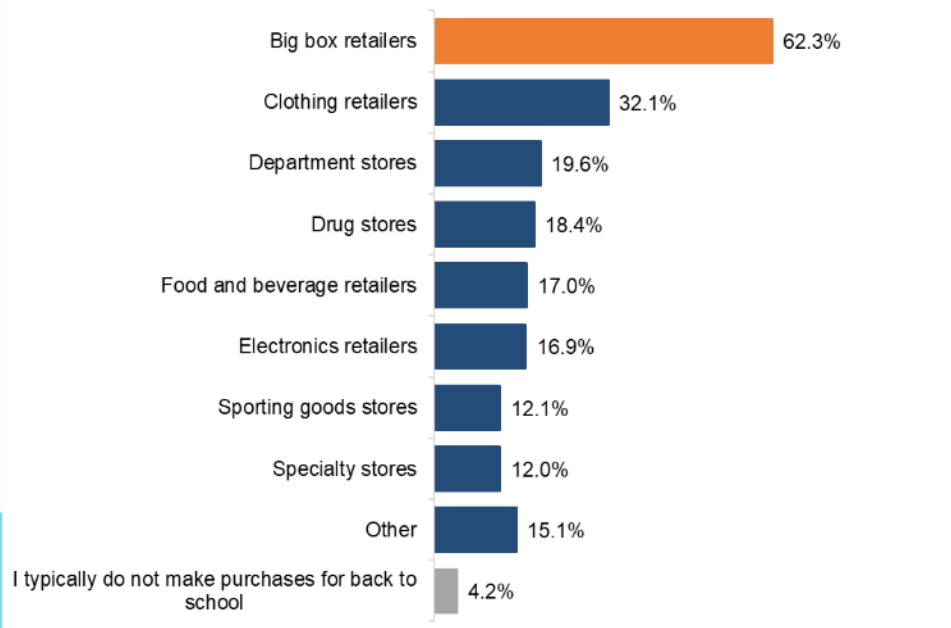
Which of the following do you spend money on as gifts or as items specifically associated with Back to School?



During going Back to School, Stationery (eg. notebooks/pens/markers/project supplies) is the top spending category (60.8%), then come Clothing (54.2%), and Books/Music (23.4%). In 2022, the top categories were clothing, books/music, and other.

Big Box retailers and Clothing retailers take the biggest share of Canadian's wallets during Back to School

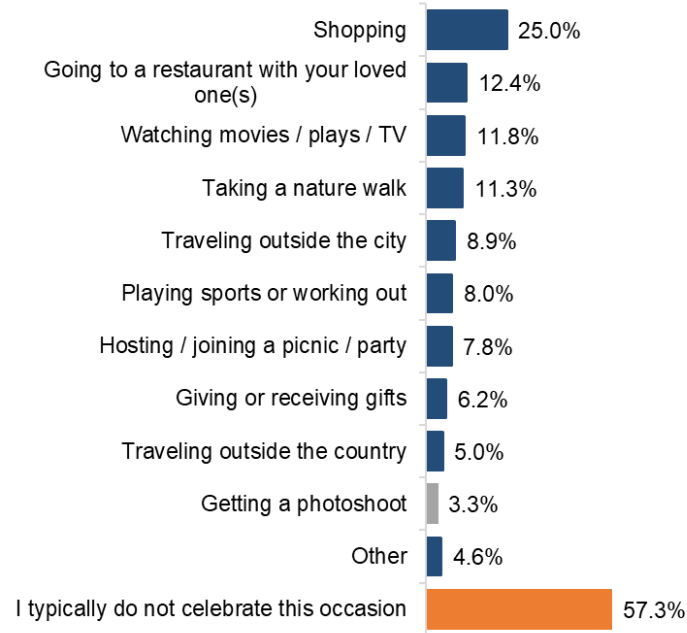
Which of the following stores do you normally make purchase related to Back to School?



During Back to School, the top three retail categories shopped are Big Box retailers (62.3%), Clothing (32.1%), and Department stores (19.6%). 2022 had the same top three retail categories.

This year, 1 in 4 Canadians will go shopping for Back to School

Which of the following Back to School activities do you typically participate in?

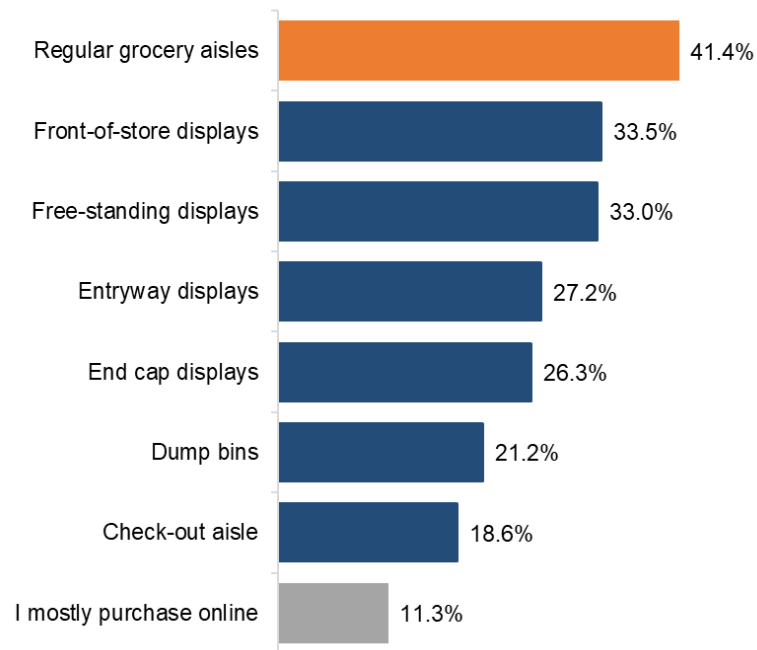


The top three activities Canadians normally do during Back to School include shopping, going to a restaurant, and watching movies/TV.

Almost half of Canadians search for Back to School products in the grocery aisles

- 41.4% of Canadians purchase Back to School products in the regular grocery aisles compared to 19.9% in 2022.
- This is followed by front-of-store displays with 33.5%.
- 33% of Canadians purchase something from free-standing displays.

Where in the store do you normally purchase the items related to Back to School?





Let's talk insights.



Anuj Punni

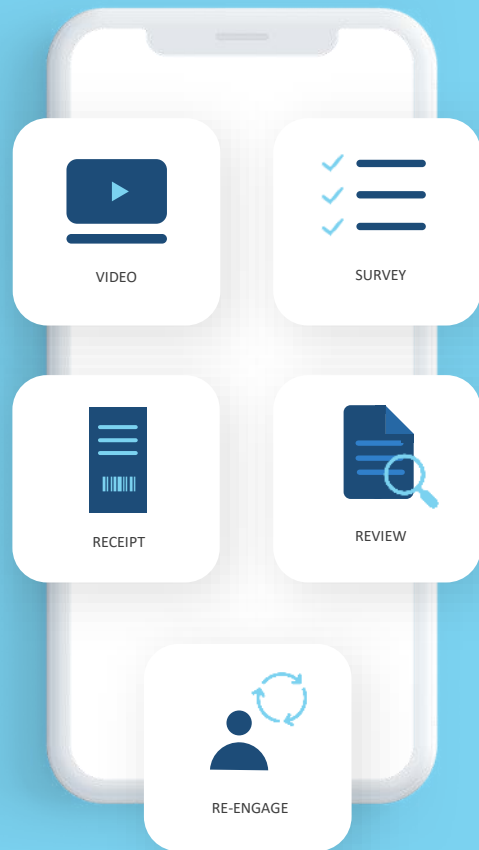
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How It Works

Capture relevant insights for any challenge or opportunity. Engage seamlessly with shoppers at every stage of the consumer journey by leveraging the **Caddle suite of tools**.

Caddle rewards panel members for actions ranging from video, survey, receipt capture, reviews, and more.





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Purchase & Declared Panel Data