SCC | STUDY OF THE CANADIAN CONSUMER

Shopper Update

Online | In-Store | Grocery | Pets

Summer 2023

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SCC | SUMMER 2023

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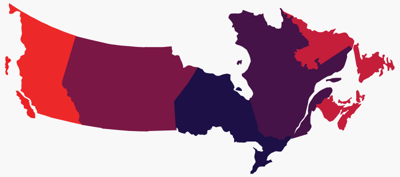
KEY CHARACTERISTICS

40,000+
Annual Respondents

60,000+
Variables

4,000+
Brands

REGIONS AND MARKETS



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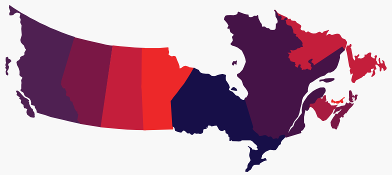

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Online Shopping

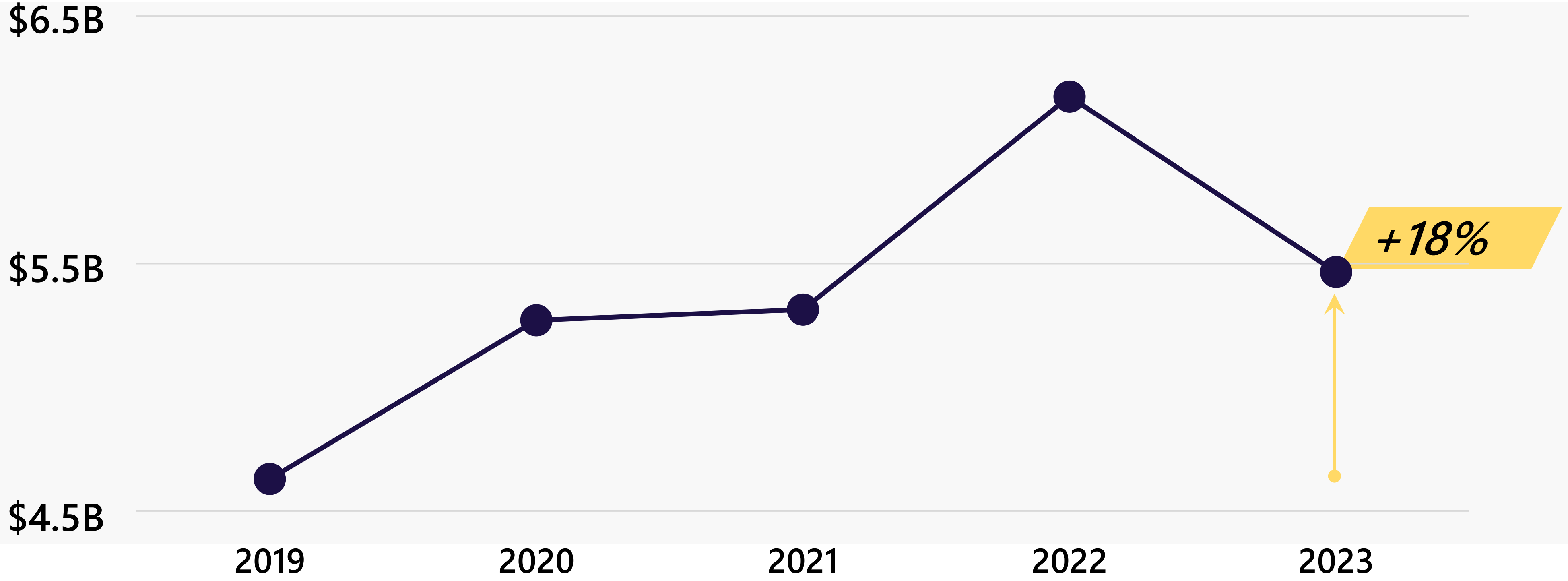
26M

Canadians shop online in an average year, spending $5.5B in an average month.

Source: SCC | Study of the Canadian Consumer Summer 2023
Base: Canadians 18+

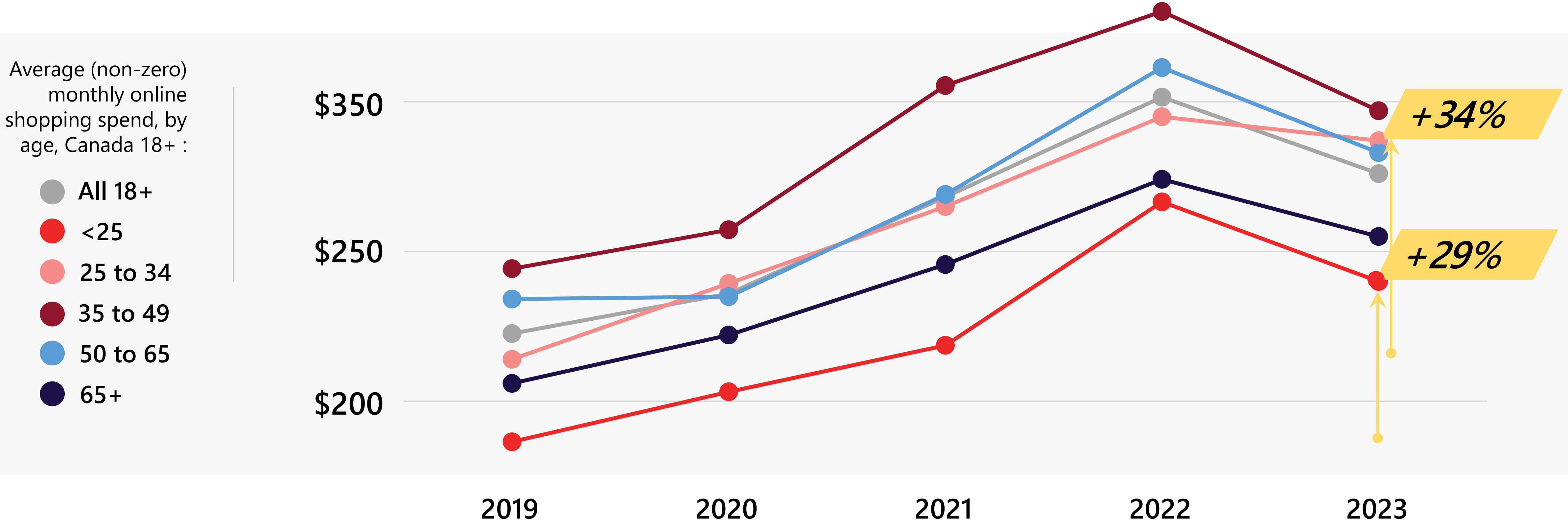
Canadians spend a total of **$5.5 billion** per month on online shopping purchases – **18%** more than in 2019.

Total monthly online shopping spend, Canada 18+:



Source: SCC | Study of the Canadian Consumer Spring 2019, 2020, 2021, 2022, & Summer 2023 – See appendix for in-field dates.
Base: Canadians 18+

Younger Canadians saw the biggest increases in online spend since 2019, with those **25 to 34** seeing the highest increase.



Source: SCC | Study of the Canadian Consumer Spring 2019, 2020, 2021, 2022, & Summer 2023 – See appendix for in-field dates.
Base: Canadians 18+

2 in 3 Canadians 18+ bought from **Amazon** in the past year.

Top 10 websites or apps purchased from (past 12 months), Canada 18+:

2019		2020		2021		2022		2023	
47%	amazon	56%	amazon	69%	amazon	71%	amazon	67%	amazon
13%	ebay	12%	Walmart	18%	Walmart	20%	Canadian Tire	19%	Walmart
10%	Walmart	11%	ebay	14%	Costco Wholesale	20%	Walmart	13%	Canadian Tire
8%	Indigo	10%	Costco Wholesale	13%	Canadian Tire	17%	Costco Wholesale	12%	Costco Wholesale
6%	Canadian Tire	9%	Indigo	13%	Indigo	13%	Indigo	10%	Indigo
6%	GROUPON	7%	Canadian Tire	11%	ebay	8%	The Home Depot	7%	ebay
4%	wayfair	5%	wayfair	8%	The Home Depot	8%	wayfair	6%	The Home Depot
4%	The Home Depot	4%	GROUPON	7%	wayfair	8%	ebay	6%	HUDSON'S BAY
3%	HUDSON'S BAY	4%	HUDSON'S BAY	4%	HUDSON'S BAY	6%	SPORTCHEK	5%	SPORTCHEK
2%	Well.ca	4%	The Home Depot	4%	GROUPON	6%	HUDSON'S BAY	4%	wayfair

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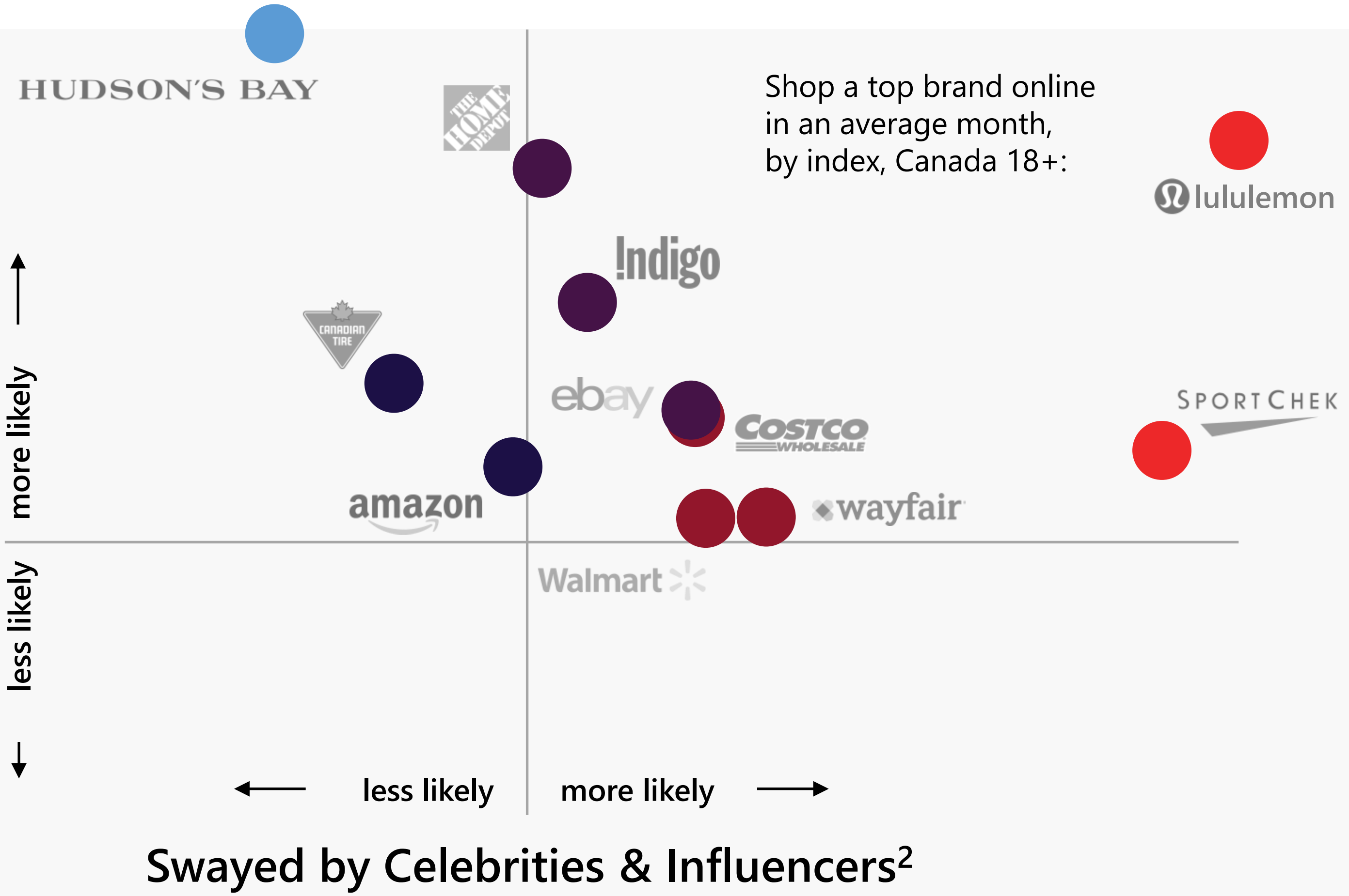
Source: SCC | Study of the Canadian Consumer Spring 2019, 2020, 2021, 2022, & Summer 2023 – See appendix for in-field dates. Base: Canadians 18+

NOTE: costco.ca was not provided as an option in SCC | Spring 2019 and sportchek.ca was not provided in SCC | Spring 2019, 2020, & 2021.

Canadians who have **higher Brand Affinity** tend to shop at **Hudson's Bay**, while those who are **swayed by celebrities and influencers** prefer to shop at **Lululemon and SportChek**.



Source: SCC | Study of the Canadian Consumer Summer 2023
Base: Canadians 18+

[1] Agree with *"Once I find a brand I like I tend to stick to it"* OR disagree with *"Even though I have a favourite brand, if another brand is on special offer I buy it instead"*. [2] Agree with *"I often buy a product recommended by an influencer I follow online"* OR *"Celebrities influence my purchase decisions"* OR *"I carefully consider product recommendations made by influencer follow online"*.

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In-Store Shopping

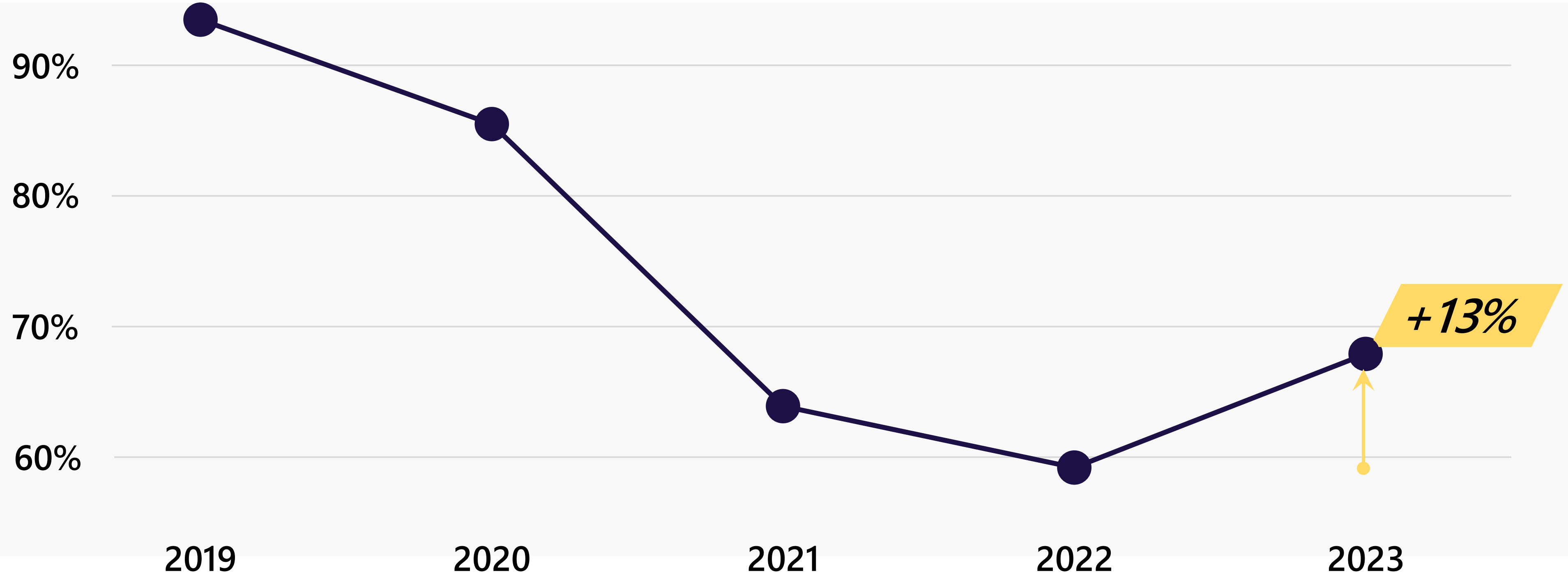
12M

Canadians 18+ visited a **shopping mall, centre, or district** in the past week.

Source: SCC | Study of the Canadian Consumer Summer 2023
Base: Canadians 18+

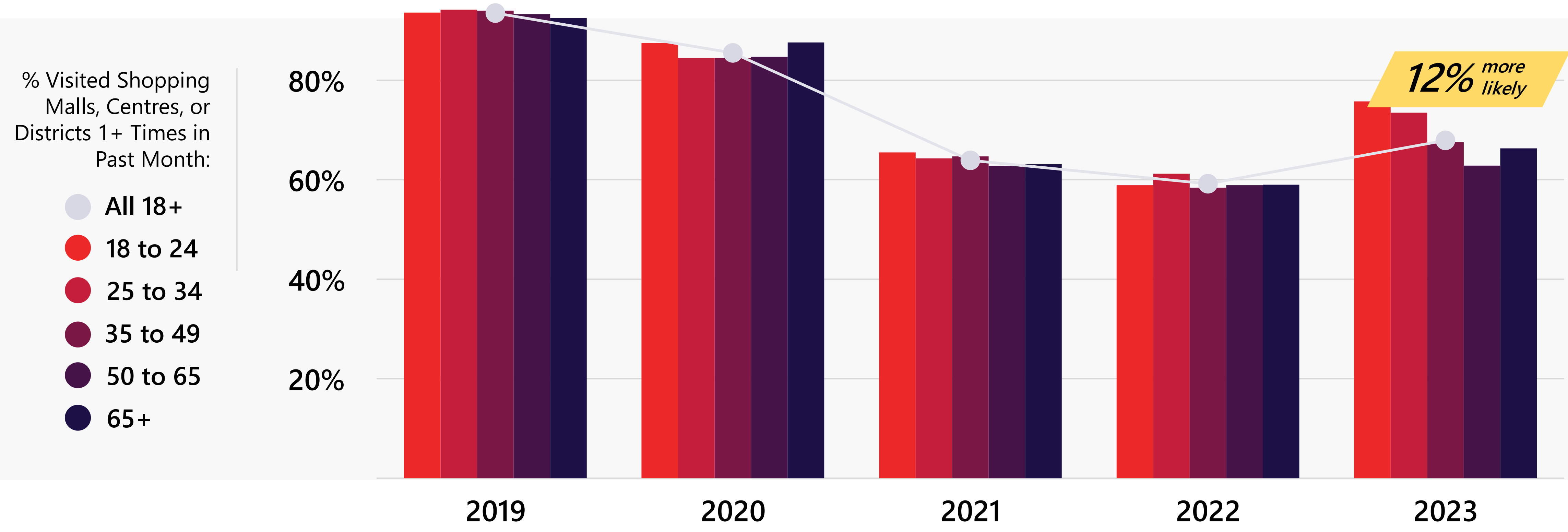
In-store shopping is on a post-COVID rebound, with **68%** of Canadians having **shopped in-store 1+ times** in an average month.

% Visited Shopping Malls, Centres, or Districts 1+ Times in Past Month, Canada 18+:



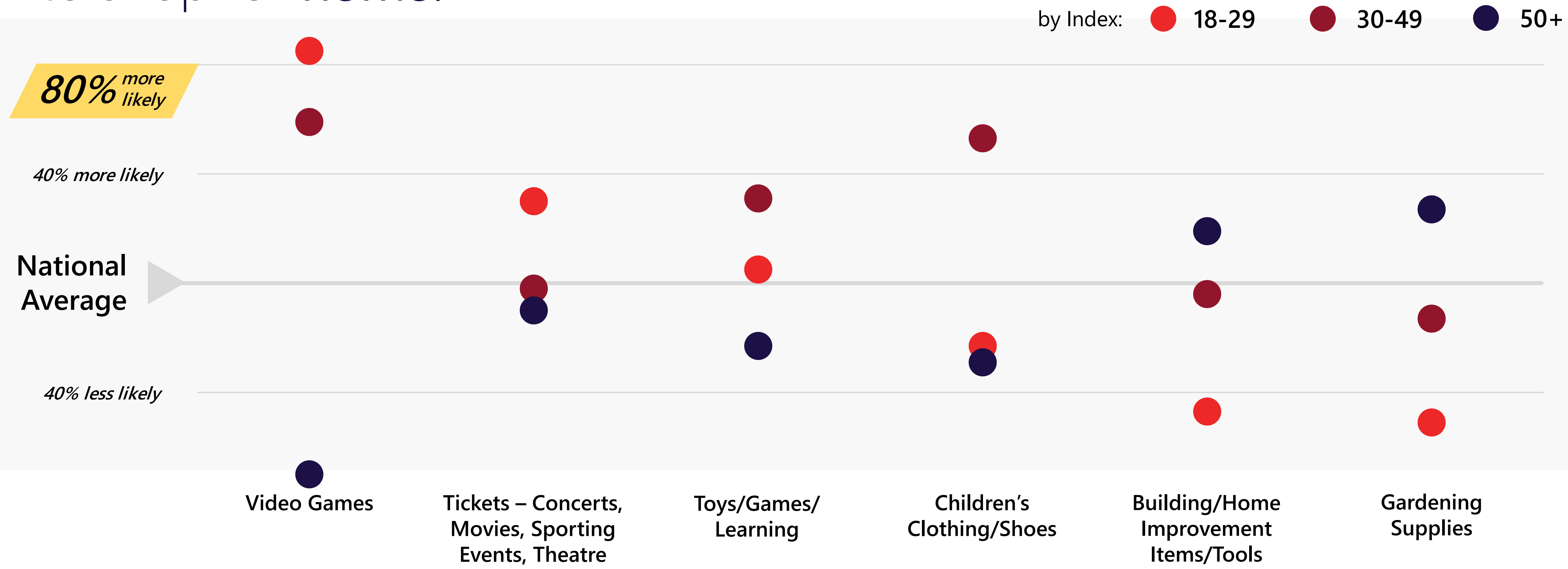
Source: SCC | Study of the Canadian Consumer Spring 2019, 2020, 2021, 2022, & Summer 2023 – See appendix for in-field dates.
Base: Canadians 18+

Younger Canadians are now more likely to visit a **shopping mall, centre, or district** in an average month.



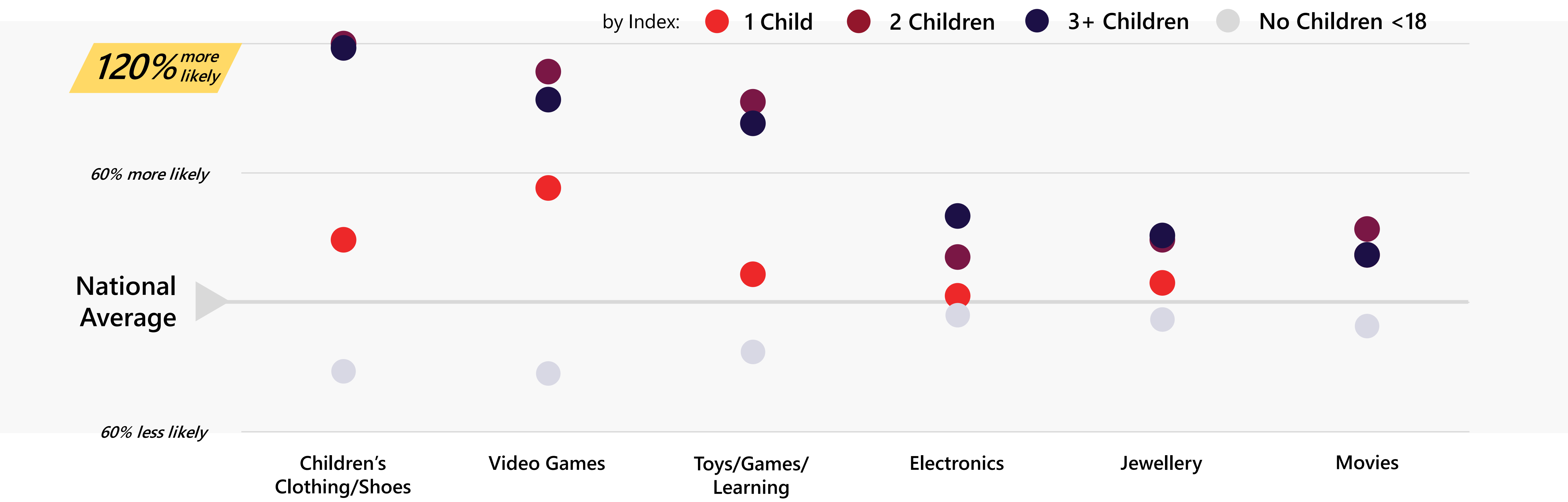
Source: SCC | Study of the Canadian Consumer Spring 2019, 2020, 2021, 2022, & Summer 2023 – See appendix for in-field dates.
Base: Canadians 18+

Canadians 18 to 29 are **85% more likely** to shop in-store for **entertainment**, while those 50+ are **27%** more likely to shop for **home.**



Source: SCC | Study of the Canadian Consumer Summer 2023
Base: Canadians 18+

Canadians with children are up to **2x more likely** to shop in-store for key **apparel** and **entertainment** items.

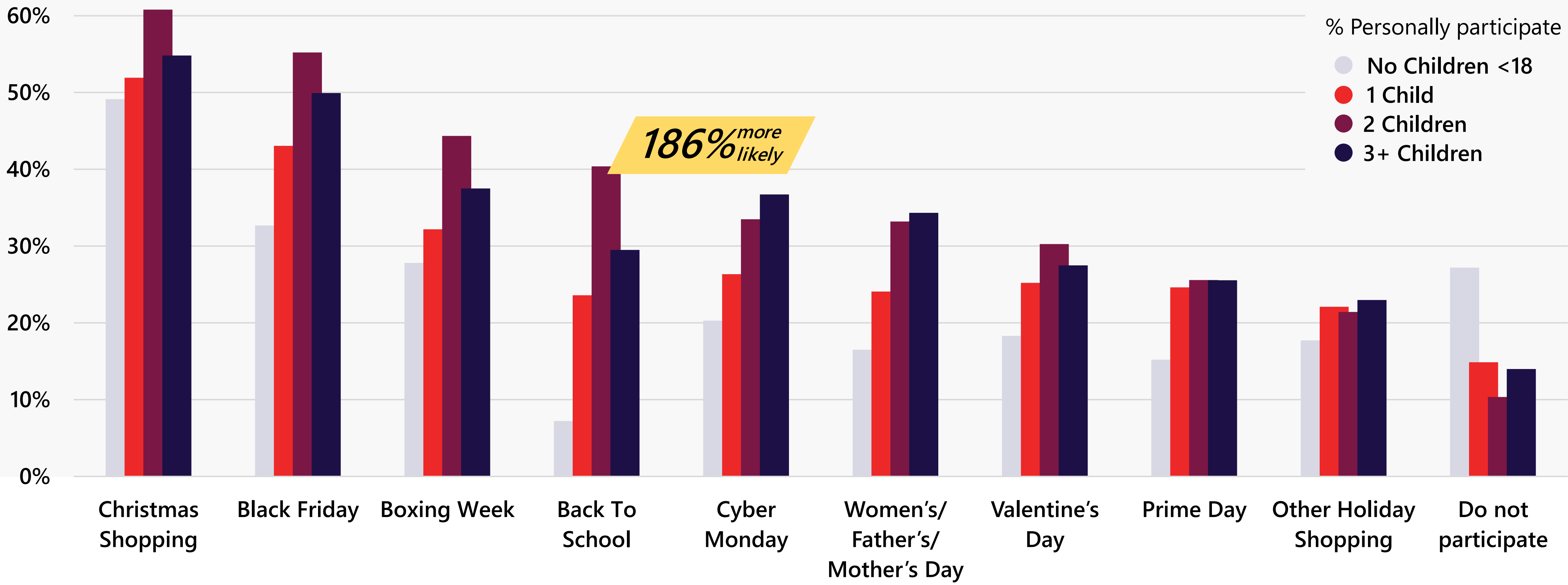


Source: SCC | Study of the Canadian Consumer Summer 2023
Base: Canadians 18+

24M

Canadians 18+ personally participate in **shopping events** of any kind.

Households with two children are the most likely to shop during **Christmas**, **Black Friday**, **Boxing Week**, and **Back to School**.



Source: SCC | Study of the Canadian Consumer Summer 2023
Base: Canadians 18+

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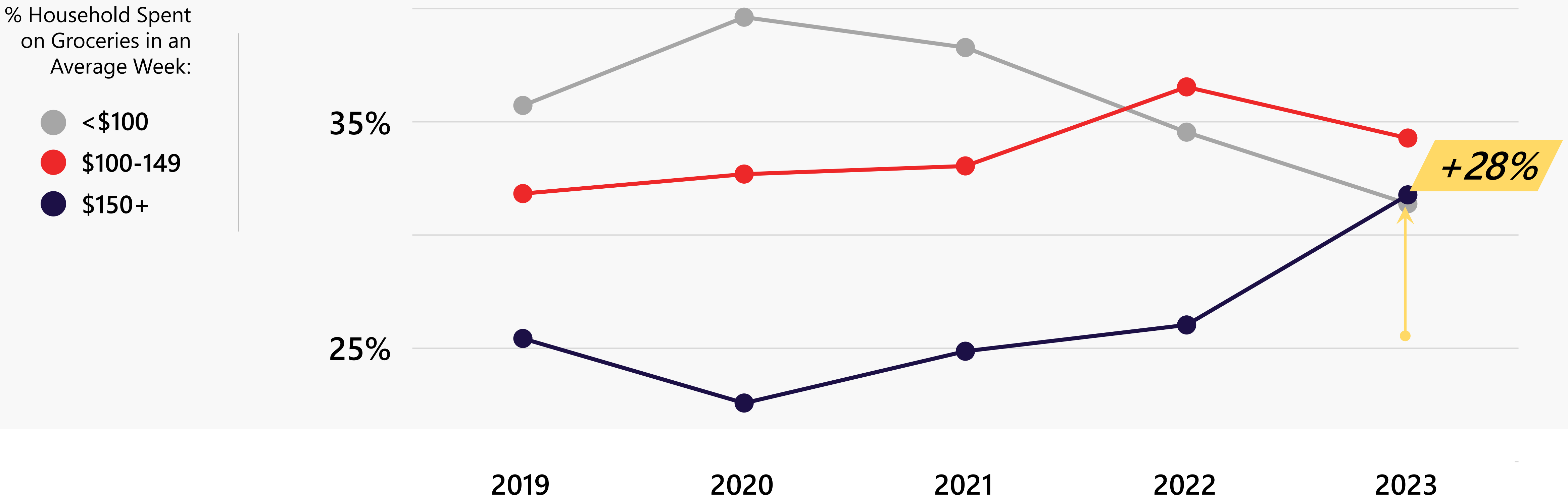
Grocery Shopping

35%

– the increase in the average Canadian's **weekly grocery spend** from 2019 to 2023

Source: SCC | Study of the Canadian Consumer Summer 2023
Base: Canadians 18+

Compared to 2019, **28% more** Canadians are spending **$150+ on groceries** in an average week.

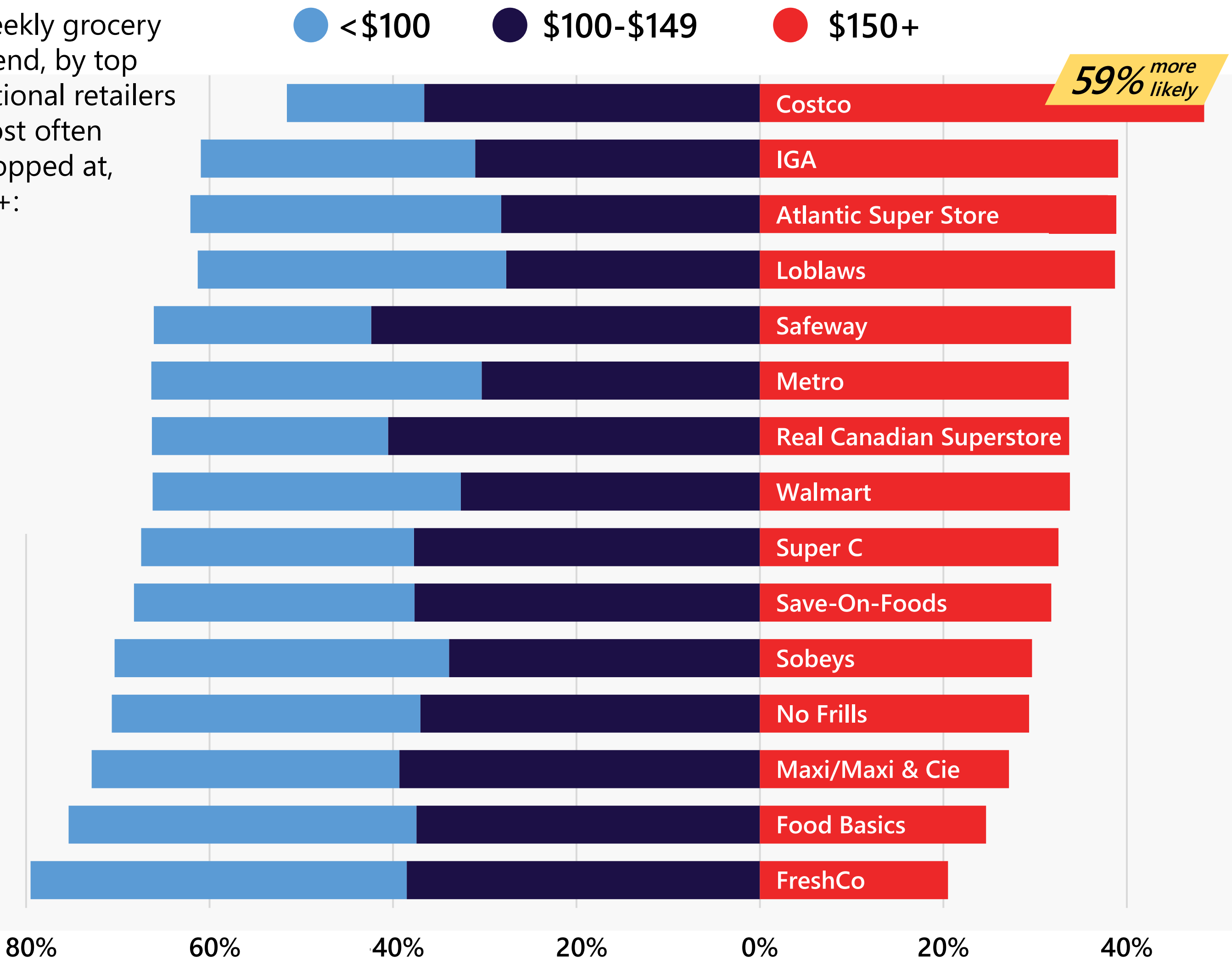


Source: SCC | Study of the Canadian Consumer Spring 2019, 2020, 2021, 2022, & Summer 2023 – See appendix for in-field dates.
Base: Canadians 18+ AND Principal Grocery Shopper is Yourself

SCC | SUMMER 2023 | GROCERY SHOPPING

Canadians that spend $150+/week on groceries are up to **59% more likely** to shop at **Costco** or **IGA**, while those that spend less are more likely to shop at **FreshCo** or **Food Basics**.

Weekly grocery spend, by top national retailers most often shopped at, 18+:



Source: SCC | Study of the Canadian Consumer Summer 2023
Base: Spend any amount on groceries weekly, Canadians 18+

54%

of Canadians are looking to reduce spending on groceries – the most of any category.

% of Canadians 18+ looking to reduce spending by category:

47%	**38%**	**33%**	**32%**	**31%**
Clothing/ Footwear	Travel	Personal Care/ Cosmetics	Utilities	Electronics/ Tech

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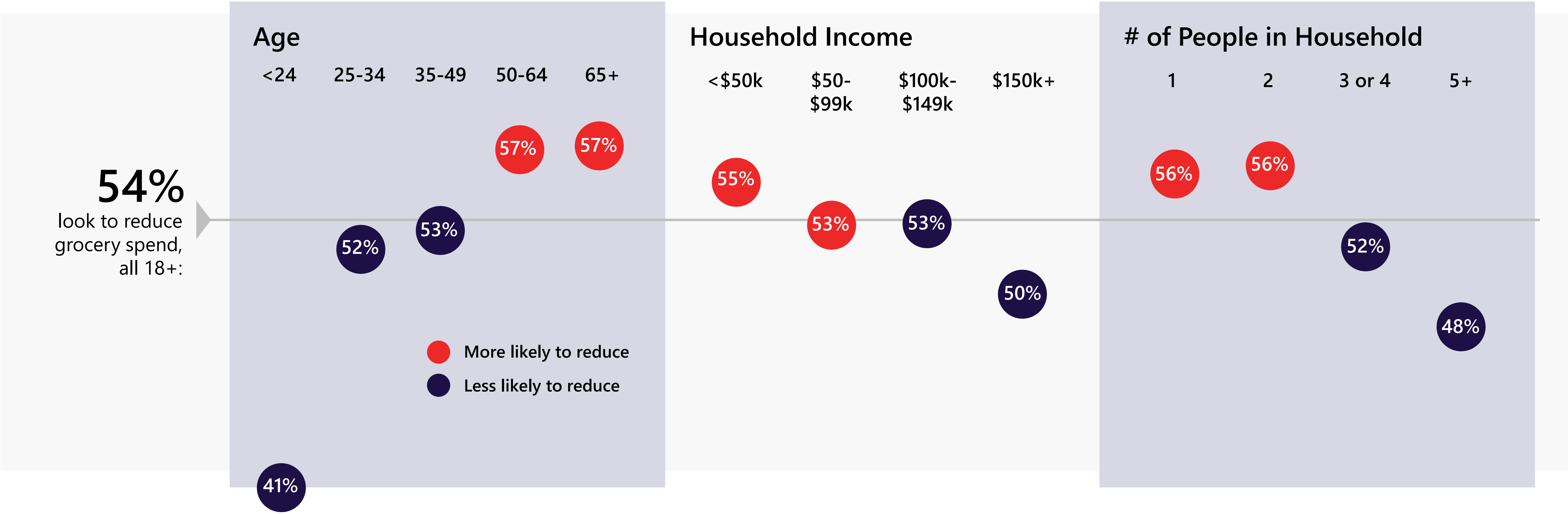
Source: SCC | Study of the Canadian Consumer Summer 2023
Base: Canadians 18+

Canadians who are **older,** live in **smaller households**, or are **lower income** are the most likely to want to reduce **grocery spend**.



Source: SCC | Study of the Canadian Consumer Spring 2023
Base: Canadians 18+

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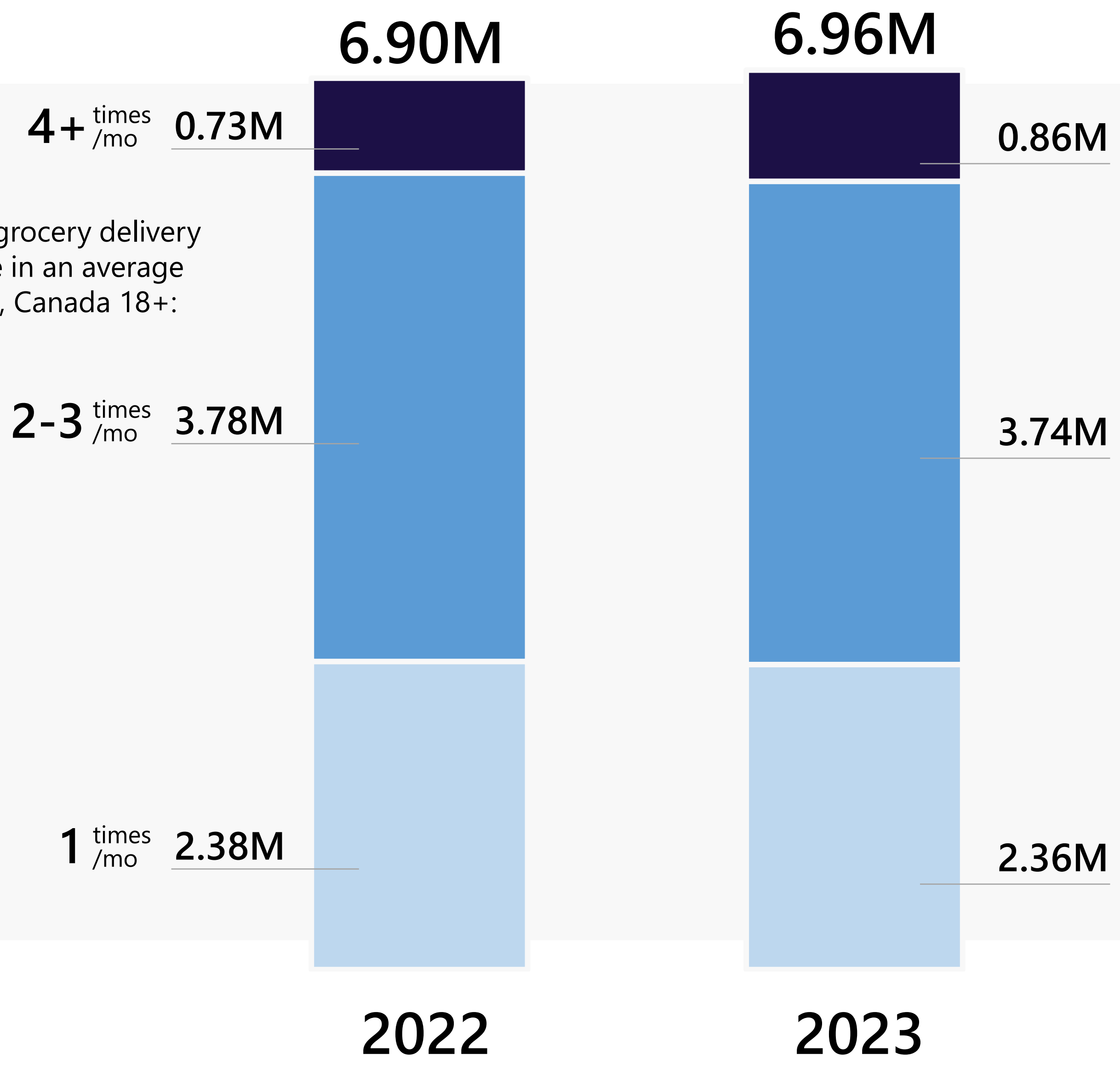
GROCERY DELIVERY

Grocery delivery saw little change compared to 2022, however over **22%** of Canadians use the service in an average month.

Use a grocery delivery service in an average month, Canada 18+:



Source: SCC | Study of the Canadian Consumer Spring 2022 and Summer 2023
Base: Canadians 18+

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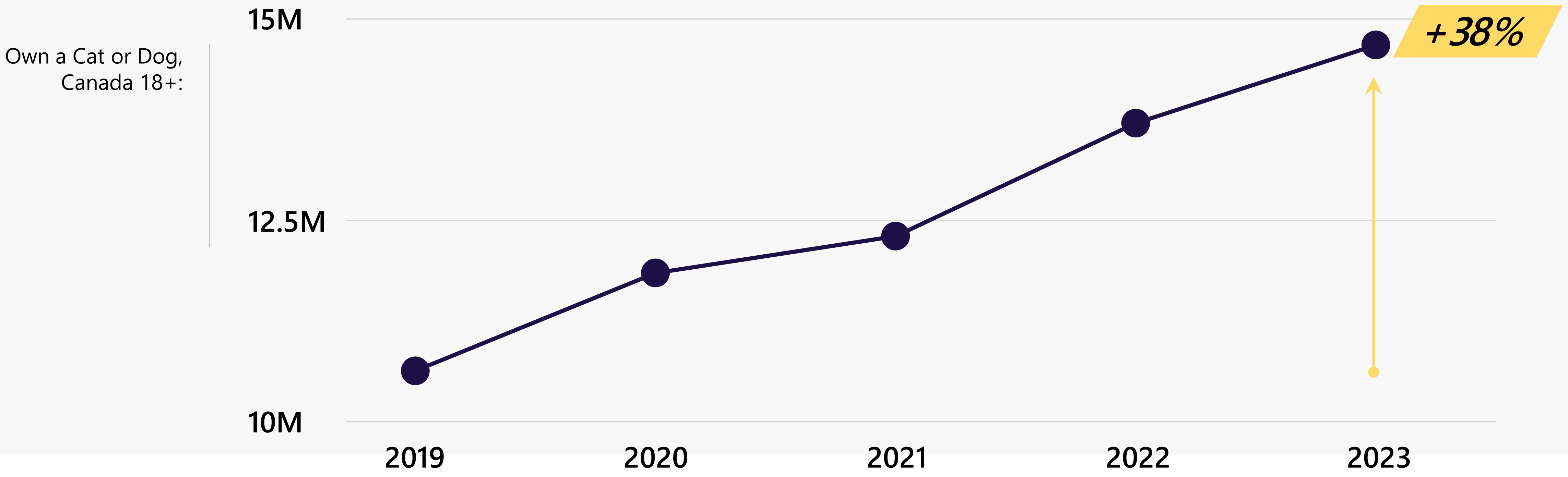
Pets

3.8M

more Canadians 18+
own a pet in 2023,
compared to 2019.

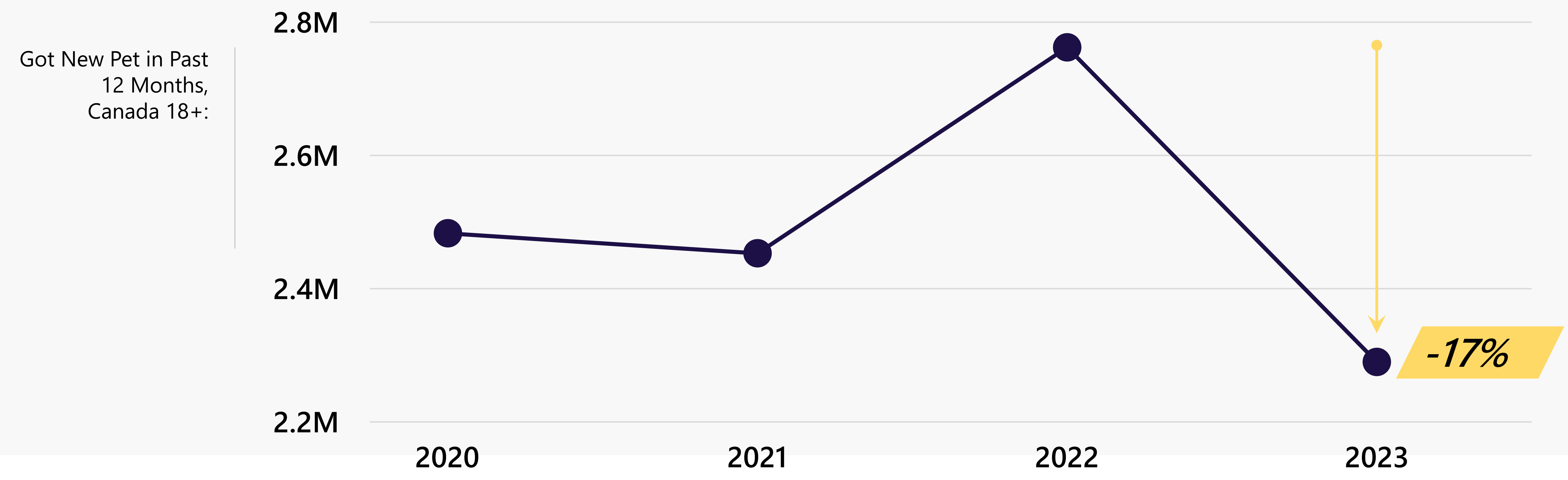
Source: SCC | Study of the Canadian Consumer Summer 2023
Base: Canadians 18+

14.7 Million Canadians now own a pet – a **38% increase** from the number of Canadians who owned pets in 2019.



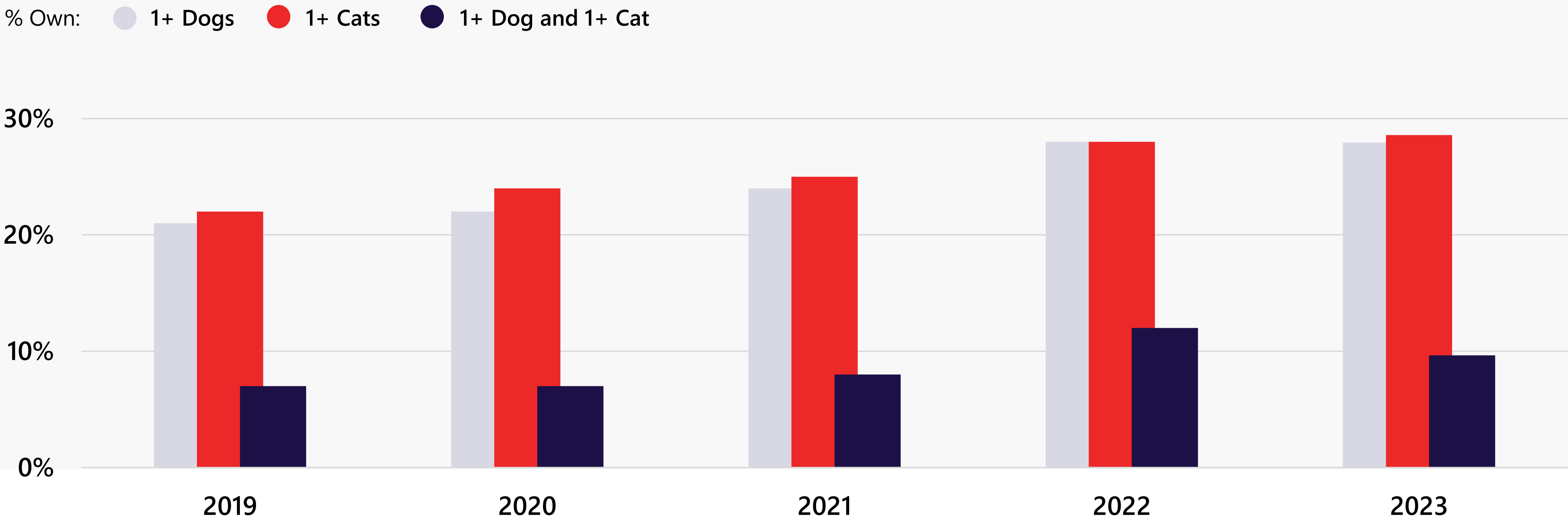
Source: SCC | Study of the Canadian Consumer Spring 2019, 2020, 2021, 2022, & Summer 2023 – See appendix for in-field dates.
Base: Canadians 18+

17% fewer Canadians got a new pet in the past 12 months, compared to the **2.76M** Canadians who got new pets in **2022**.



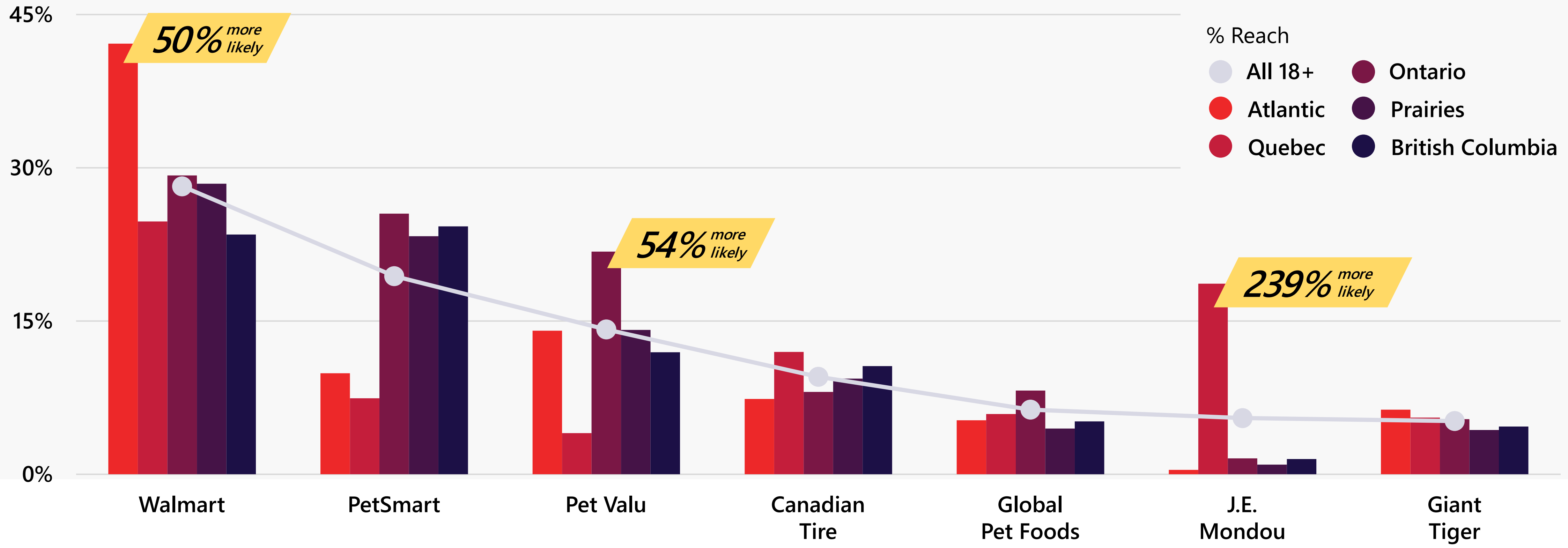
Source: SCC | Study of the Canadian Consumer Spring 2020, 2021, 2022, & Summer 2023 – See appendix for in-field dates.
Base: Canadians 18+

Mixed species pet ownership peaked in 2022 with 12% of Canadians owning at least **one dog and one cat**.



Source: SCC | Study of the Canadian Consumer Summer 2023
Base: Canadians 18+

Most Canadian pet owners buy pet food at **Walmart**, however **Pet Smart** and **Pet Valu** show strongly in Ontario while **J.E. Mondou** performs well with pet owners in Quebec.



Source: SCC | Study of the Canadian Consumer Summer 2023
Base: Canadians 18+ AND HH Owns a Cat, Dog, or Other Pet

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New For Summer

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New to the SCC | Study of the Canadian Consumer

NEW **variables**:

- New statements to describe **household structure**
- Time spent on **Traditional/Linear TV** in a typical day
- Amount spent monthly on **TV services**, **streaming services**, and **audio content services**
- New statements describing reasons to use **streaming services**
- Brands of TV device **owned** and **intend to purchase**
- Use of **QR Codes** related to marketing, advertising, or promotional offers in the past month

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New to the SCC | Study of the Canadian Consumer

NEW variables:

- 6 additional companies captured in **homeowners/property insurance** vendors
- Reasons for doing or planning to do **home modifications**
- Amount spent or intend to spend on **home modifications**
- Likelihood to **stay in current residence or move elsewhere** in relation to ageing
- Preferred **locations to age**
- **New brands** added to 8 consumer categories, including chocolate/candy bars, beer, frozen pizza, and more.

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Quintiles & Terciles

Magazine Quintiles

		All		English		French	
PRINT Issues per Month, All 18+	Light	<= 0.00	**39.1%**	<= 0.000	**39.2%**	<= 0.000	**38.3%**
	Medium-Light	0.001 – 0.314	**15.3%**	0.001 – 0.311	**15.2%**	0.001 – 0.341	**15.2%**
	Medium	0.315 – 0.720	**15.1%**	0.312 – 0.687	**15.1%**	0.342 – 0.911	**16.0%**
	Medium-Heavy	0.721 – 1.866	**15.0%**	0.688 – 1.852	**15.0%**	0.912 – 1.898	**15.0%**
	Heavy	1.867+	**15.5%**	1.853+	**15.5%**	1.899+	**15.5%**
PRINT Issues per Month, Users Only, 18+	Light	<= 0.287	**20.3%**	<= 0.274	**20.5%**	<= 0.314	**20.8%**
	Medium-Light	0.288 – 0.529	**20.2%**	0.275 – 0.495	**20.0%**	0.315 – 0.685	**20.6%**
	Medium	0.530 – 1.074	**20.0%**	0.496 – 1.043	**20.0%**	0.686 – 1.237	**20.1%**
	Medium-Heavy	1.075 – 2.453	**20.0%**	1.044 – 2.468	**20.0%**	1.238 – 2.522	**20.0%**
	Heavy	2.454+	**19.5%**	2.469+	**19.5%**	2.523+	**18.5%**
DIGITAL # of Times Accessed per Month, All 14+	Light	<= 0.00	**49.3%**	<= 0.00	**50.2%**	<= 0.00	**45.4%**
	Medium-Light	0.01 - 1.00	**12.2%**	0.01 – 1.00	**12.5%**	0.01 – 1.50	**13.1%**
	Medium	1.01 – 4.00	**12.6%**	1.01 – 4.00	**12.8%**	1.51 – 5.00	**13.9%**
	Medium-Heavy	4.01 – 16.50	**13.3%**	4.01 – 16.50	**12.2%**	5.01 – 16.50	**14.1%**
	Heavy	16.51+	**12.6%**	16.51+	**12.3%**	16.51+	**13.5%**
DIGITAL # of Times Accessed per Month, Users Only, 14+	Light	<= 1.00	**24.0%**	<= 1.00	**25.0%**	<= 1.00	**19.7%**
	Medium-Light	1.01 – 3.50	**21.2%**	1.01 – 3.00	**18.8%**	1.01 – 3.50	**19.6%**
	Medium	3.51 – 8.50	**17.3%**	3.01 – 8.50	**19.2%**	3.51 – 8.00	**20.4%**
	Medium-Heavy	8.51 – 24.50	**18.3%**	8.51 – 24.50	**17.6%**	8.01 – 22.50	**20.1%**
	Heavy	24.51+	**19.2%**	24.51+	**19.4%**	22.51+	**20.2%**

Source: Vividata's SCC | Study of the Canadian Consumer Summer 2023
Base: Total Canada 14+ & 18+

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Newspaper Quintiles

		All		English		French	
PRINT Days per Week, All 18+	Light	<= 0.000	**69.0%**	<= 0.000	**70.9%**	<= 0.000	**61.1%**
	Medium-Light	0.001 – 1.125	**7.65**	0.001 – 1.125	**6.3%**	0.001 – 0.875	**9.0%**
	Medium	1.126 – 2.625	**8.4%**	1.126 – 2.625	**8.1%**	0.876 – 1.875	**10.0%**
	Medium-Heavy	2.626 – 5.125	**8.0%**	2.626 – 4.875	**7.1%**	1.876 – 4.625	**10.0%**
	Heavy	5.126+	**7.0%**	4.876+	**7.6%**	4.626+	**9.9%**
PRINT Days per Week, Users Only, 18+	Light	<= 1.000	**23.7%**	<= 1.000	**20.7%**	<= 0.750	**21.8%**
	Medium-Light	1.001 – 2.000	**21.4%**	1.001 – 2.000	**21.8%**	0.751 – 1.375	**19.0%**
	Medium	2.001 – 3.500	**17.5%**	2.001 – 3.500	**18.9%**	1.376 – 2.675	**18.9%**
	Medium-Heavy	3.501 – 5.500	**19.0%**	3.501 – 5.500	**19.8%**	2.676 – 5.375	**19.8%**
	Heavy	5.501+	**18.4%**	5.501+	**18.8%**	5.376+	**20.5%**
DIGITAL # of Times Accessed per Month, All 14+	Light	<= 0.00	**37.2%**	<= 0.00	**38.0%**	<= 0.00	**34.0%**
	Medium-Light	0.01 – 2.50	**15.6%**	0.01 – 2.50	**15.9%**	0.01 – 3.50	**16.5%**
	Medium	2.51 – 10.00	**17.2%**	2.51 – 10.00	**17.4%**	3.51 – 11.00	**15.9%**
	Medium-Heavy	10.01 – 34.50	**15.1%**	10.01 – 34.50	**14.9%**	11.01 – 35.00	**16.8%**
	Heavy	34.51+	**14.9%**	34.51+	**13.8%**	35.01+	**16.8%**
DIGITAL # of Times Accessed per Month, Users Only, 14+	Light	<= 2.50	**24.8%**	<= 2.00	**20.0%**	<= 2.50	**21.3%**
	Medium-Light	2.51 – 7.00	**16.7%**	2.01 – 5.50	**19.8%**	2.51 – 9.50	**18.8%**
	Medium	7.01 – 15.50	**19.9%**	5.51 – 13.00	**19.9%**	9.51 – 19.50	**19.4%**
	Medium-Heavy	15.51 – 35.00	**18.0%**	13.01 – 35.00	**21.0%**	19.51 – 39.00	**20.2%**
	Heavy	35.01+	**20.6%**	35.01+	**19.3%**	39.01+	**20.3%**

Source: Vividata's SCC | Study of the Canadian Consumer Summer 2023
Base: Total Canada 14+ & 18+

Media Terciles

		All		English		French	
TELEVISION Live or Streaming, Hours per Week, All 18+	Light	<= 10.50	**48.8%**	<= 10.50	**50.2%**	<= 10.50	**42.7%**
	Medium	10.51 – 21.00	**30.6%**	10.51 – 21.00	**30.0%**	10.51 – 21.00	**33.4%**
	Heavy	21.01+	**20.6%**	21.01+	**19.8%**	21.01+	**23.9%**
RADIO Live or Streaming, Hours per Week, All 18+	Light	<= 0.00	**23.1%**	<= 0.00	**21.6%**	<= 0.00	**29.6%**
	Medium	0.01 – 3.50	**30.4%**	0.01 – 3.50	**30.5%**	0.01 – 3.50	**30.1%**
	Heavy	3.51+	**46.5%**	3.51+	**47.9%**	3.51+	**40.3%**
INTERNET Any online activity on any device, Hours per Week, All 18+	Light	<= 10.50	**28.1%**	<= 10.50	**26.4%**	<= 10.50	**35.4%**
	Medium	10.51 – 21.00	**34.3%**	10.51 – 21.00	**33.8%**	10.51 – 21.00	**36.2%**
	Heavy	21.01+	**37.6%**	21.01+	**39.8%**	21.01+	**28.4%**
MOBILE INTERNET Online activity on a mobile device, Hours per Week, All 18+	Light	<= 3.50	**32.4%**	<= 3.50	**30.9%**	<= 3.50	**38.9%**
	Medium	3.51 – 10.50	**28.7%**	3.51 – 10.50	**28.3%**	3.51 – 10.50	**30.3%**
	Heavy	10.51+	**38.9%**	10.51+	**40.8%**	10.51+	**30.8%**

Source: Vividata's SCC | Study of the Canadian Consumer Summer 2023
Base: Total Canada 18+

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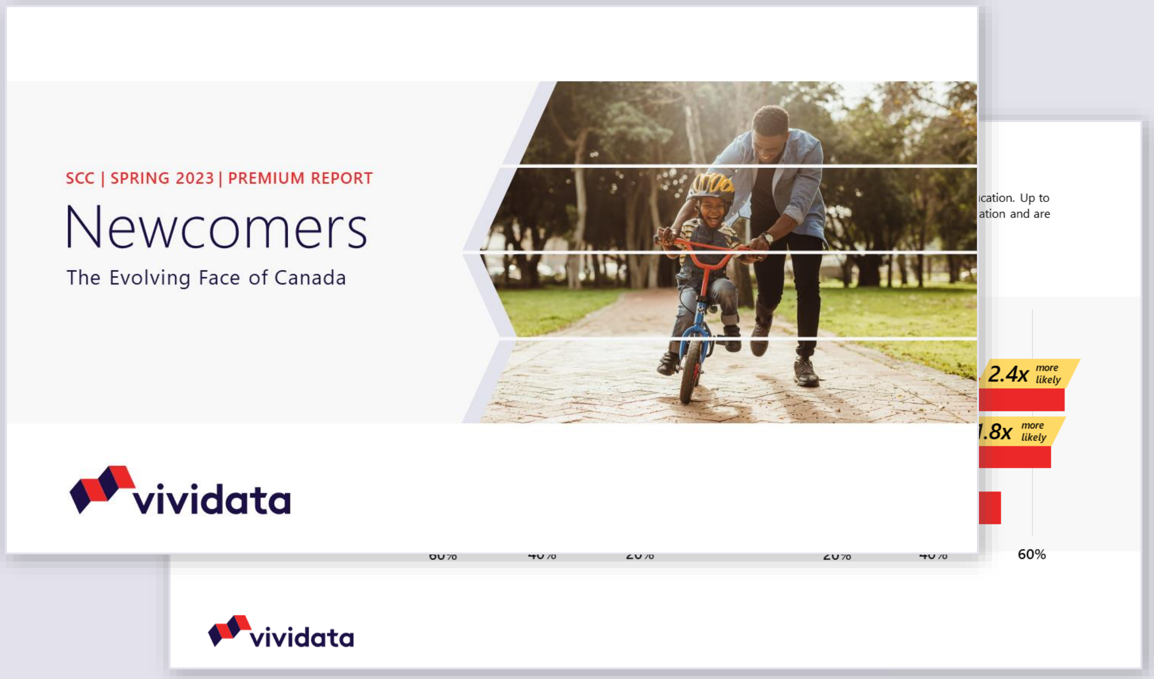
Appendix

In-Field Dates

SCC | Spring 2019	Major Markets	January 2018 to December 2018
	Local Markets	January 2017 to December 2018
SCC | Spring 2020	Major Markets	October to December 2018, April to December 2019
	Local Markets	October 2017 to December 2018, April to December 2019
SCC | Spring 2021	Major Markets	January 2020 to December 2020
	Local Markets	October 2018 to December 2020
SCC | Spring 2022	Major Markets	January 2021 to December 2021
	Local Markets	January 2020 to December 2021
SCC | Summer 2023	Major Markets	April 2022 to March 2023
	Local Markets	April 2021 to March 2023



NEW REPORT

Discover What Motivates Canadian Newcomers

Understanding the unique needs and wants of new Canadians – and more established immigrants – is key to creating content and media strategies that resonate and connect in meaningful ways.

That’s why in this latest report, we’ve delved into Vividata’s SCC and SCC/Multicultural databases, and shared some of the key demographics, consumer voices, and topline media behaviours that marketers can use to help these diverse communities feel right at home.

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