

Grocery Experience National Survey Report

Fall 2018

High-Level Findings

- Average Canadian visits 2.3 grocery stores regularly;
- Average Canadian will visit a grocery store 5.43 times a month, 1.29 times a week, 32 minutes on average;
- 49.4% of Canadians don't intend to purchase food online;
- 66% of Canadians acknowledged to have used self-checkouts;
- Respondents in **Quebec** appear to be more curious than respondents in other regions;
- Younger Canadians prefer to shop at food stores where they know people who work there;
- Respondents from Urban Cores appear to want to know who owns the food store;
- 81.7% of Canadians believe it is important to be able to ask for some assistance if needed when grocery shopping;
- Community engagement important in **British Columbia**.



HOUSIE 18
VERSITY 20

Survey Performance



- **Aim of the study:** To pinpoint what could allow independent grocers to prosper in a new food economy in which consumer demand is becoming more fragmented. As part of this study, opportunities and strategies will be identified for rural and urban independent grocery stores, allowing them to seek ways for differentiation.
- **Survey duration:** 3 days, October 2018;
- **Sample size:** n=1053.

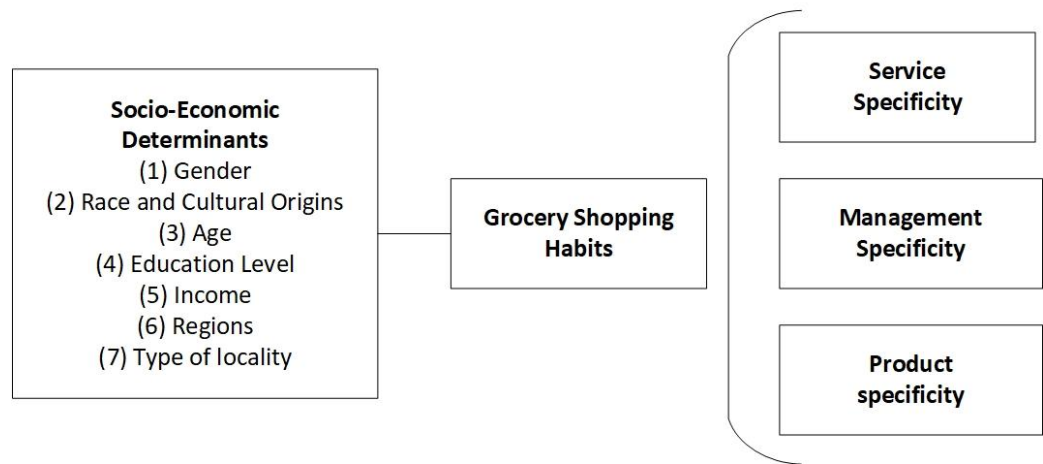
Survey Performance



- **Bilingual survey**, Cross-Canada study (including Québec);
- Respondents were required to be 18 years old and must have been living in Canada for at least the last 12 months;
- **Completion rate**: 98%;
- Average duration of survey: 6.5 minutes;
- Representative sample for Canadian market;
- Estimated margin of error: 3.1%, 19 times out of 20.

Conceptual Framework

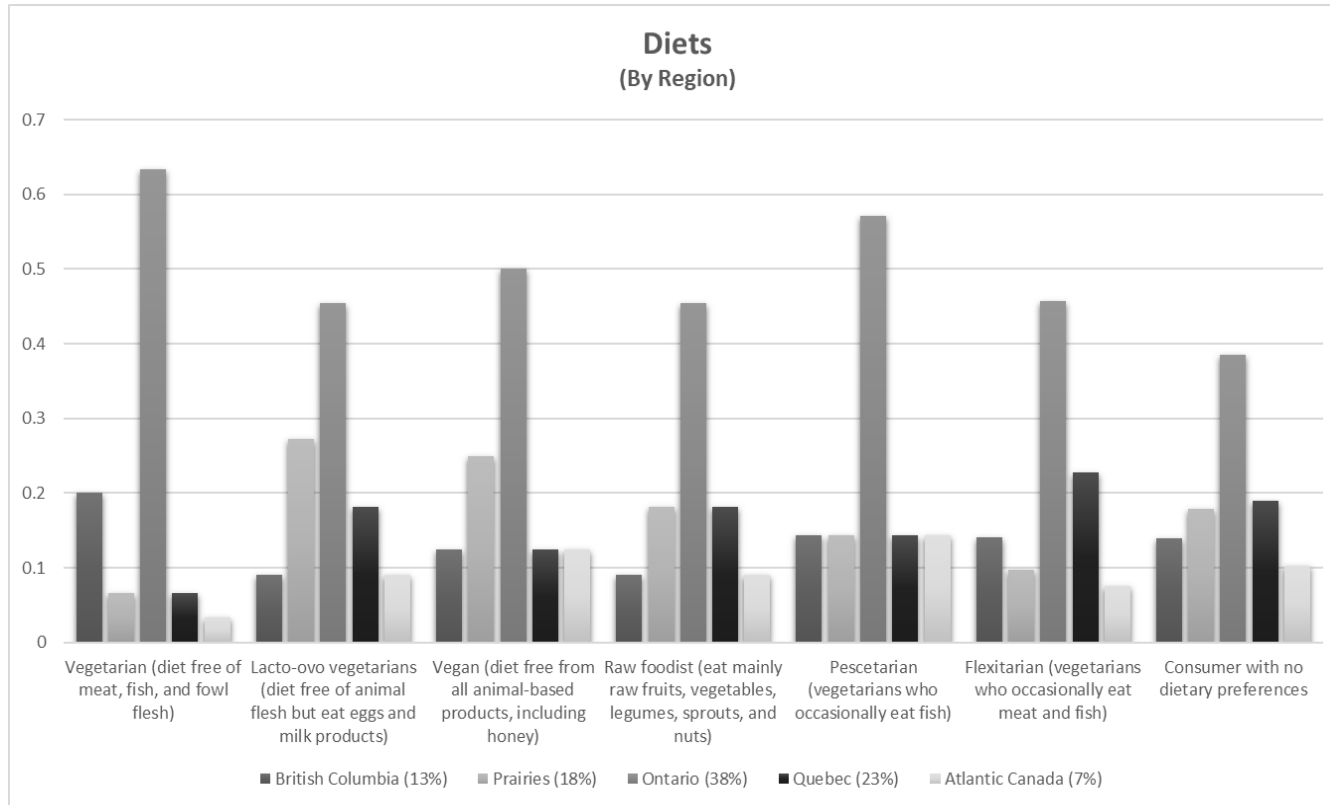
Figure 1
Determinants, Grocery Shopping Habits and Preferences



Dietary Restrictions, Choices and General Grocery Shopping Habits

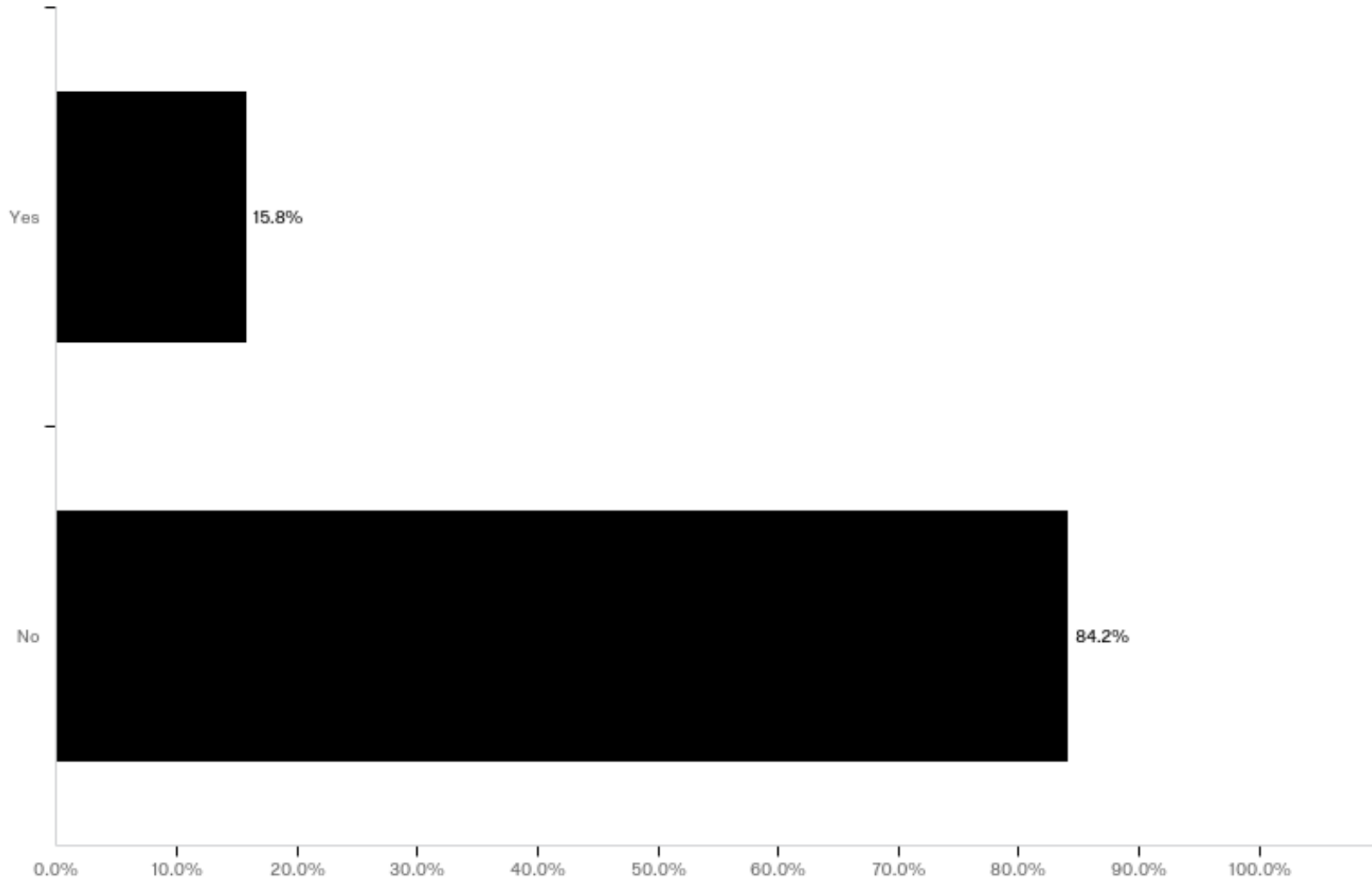


As a consumer, I consider myself a...

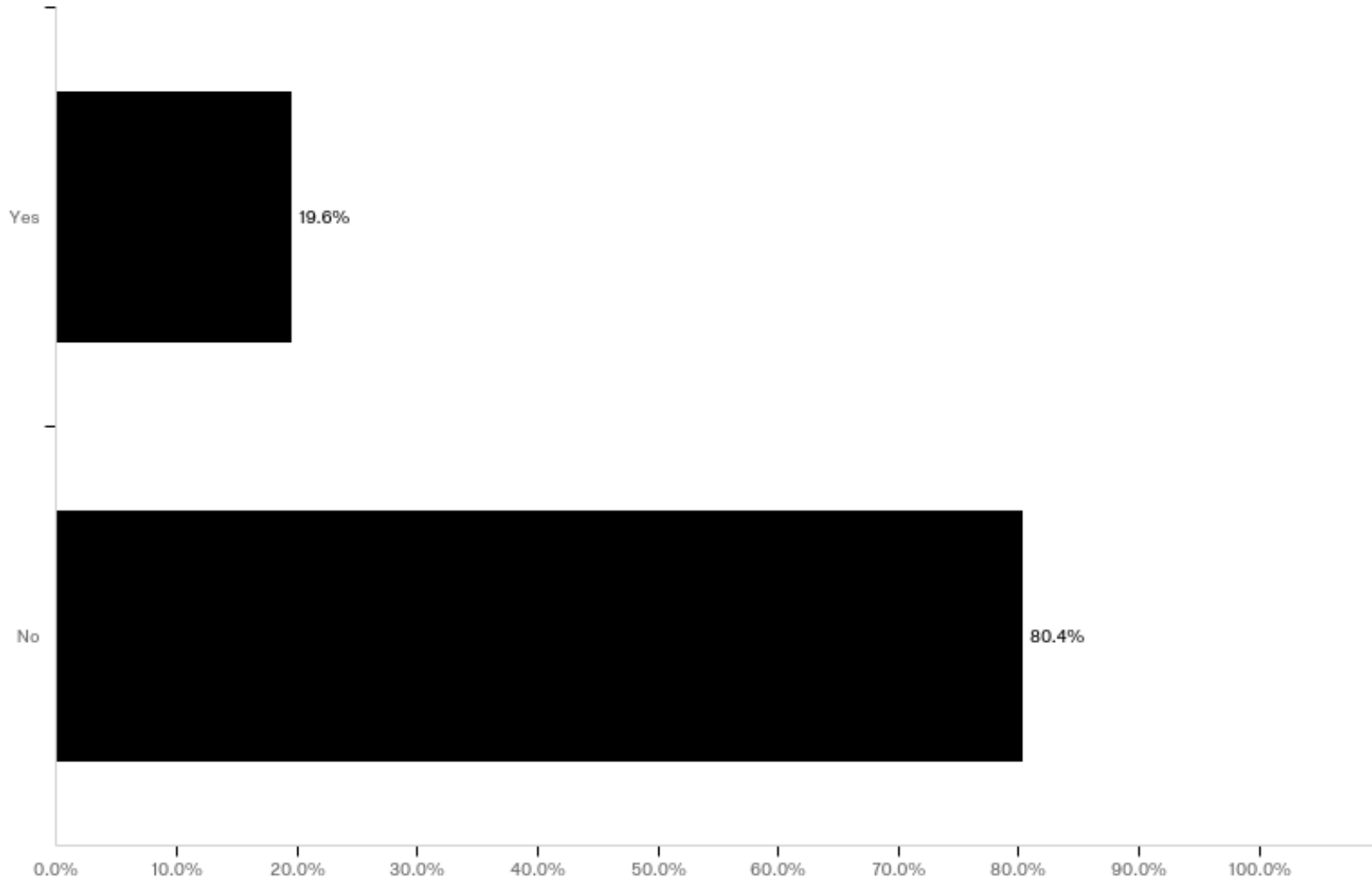


*Almost 20% of respondents have dietary preferences, and respondents from **Ontario** are more likely to have dietary preferences than others*

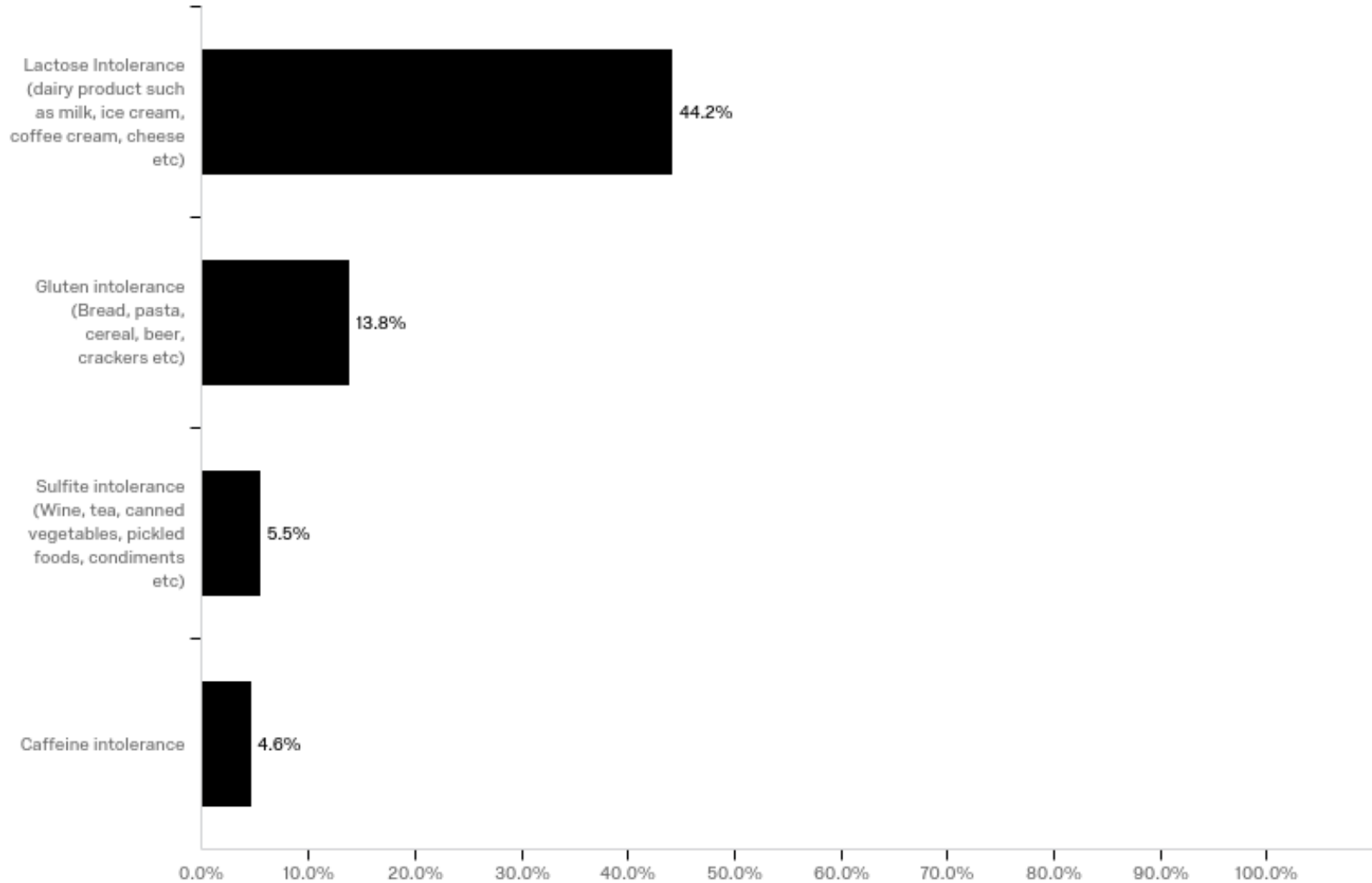
Do you have any food allergies?



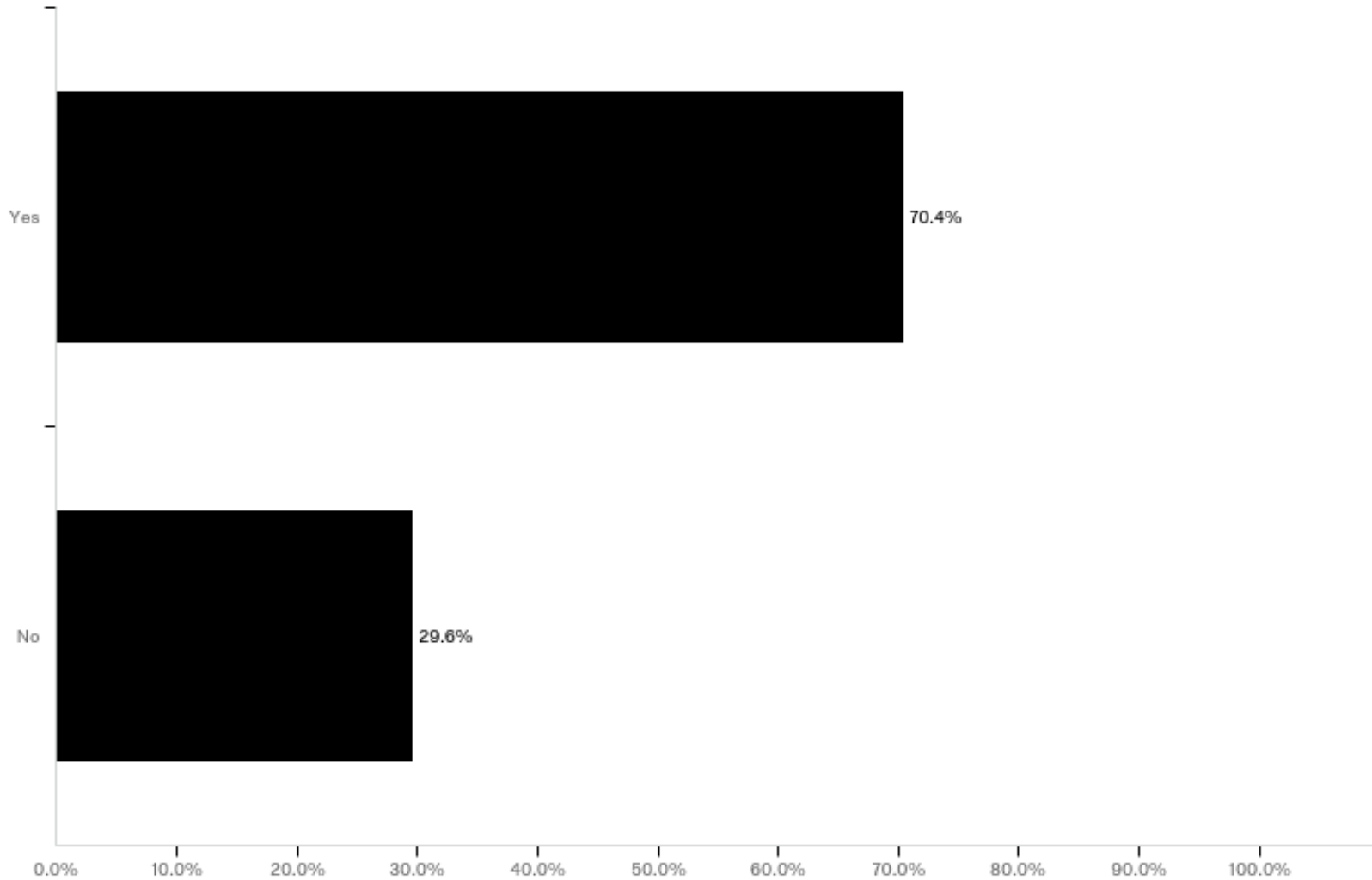
Do you have any food intolerances?



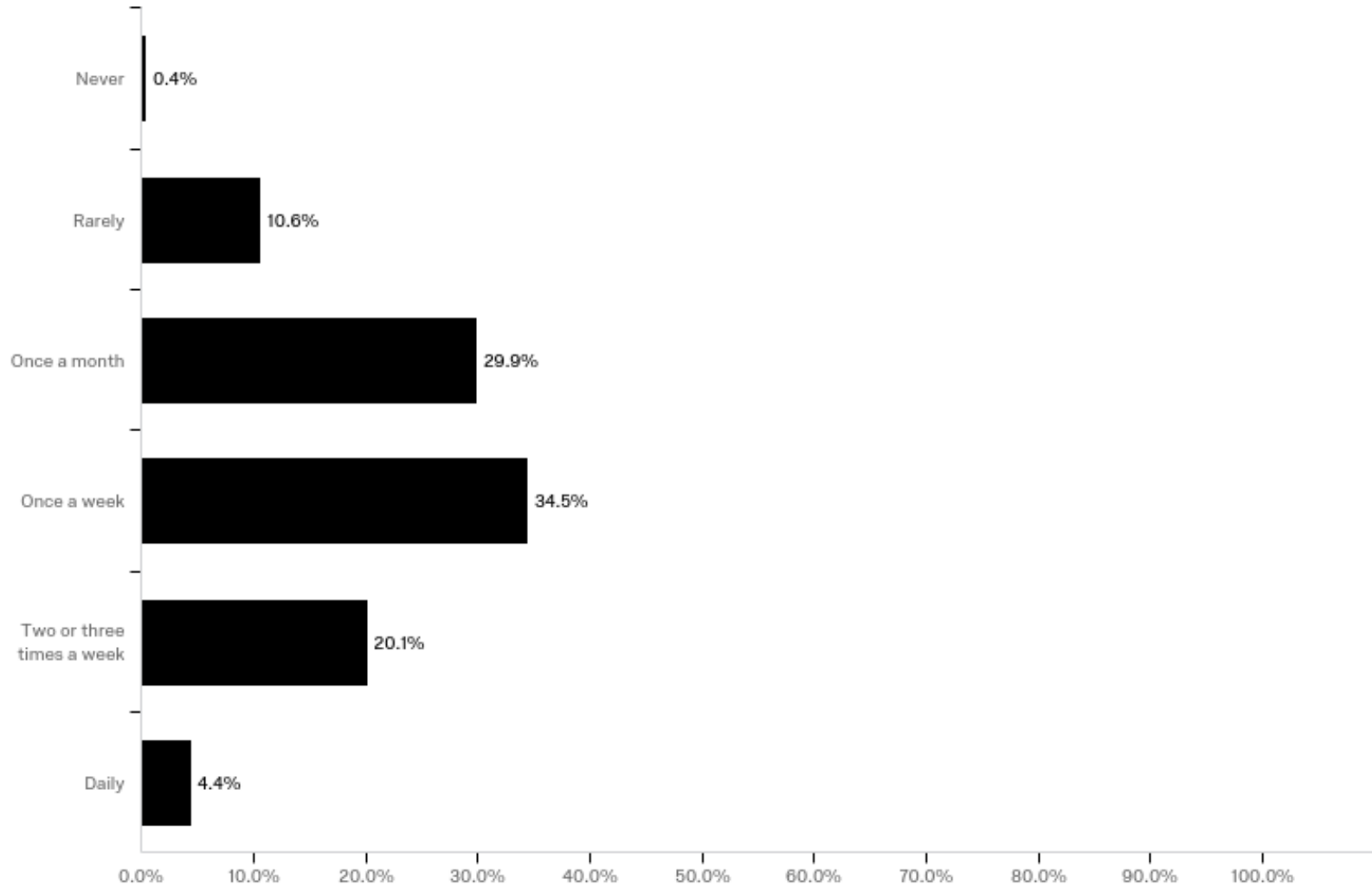
Which food intolerances do you have?



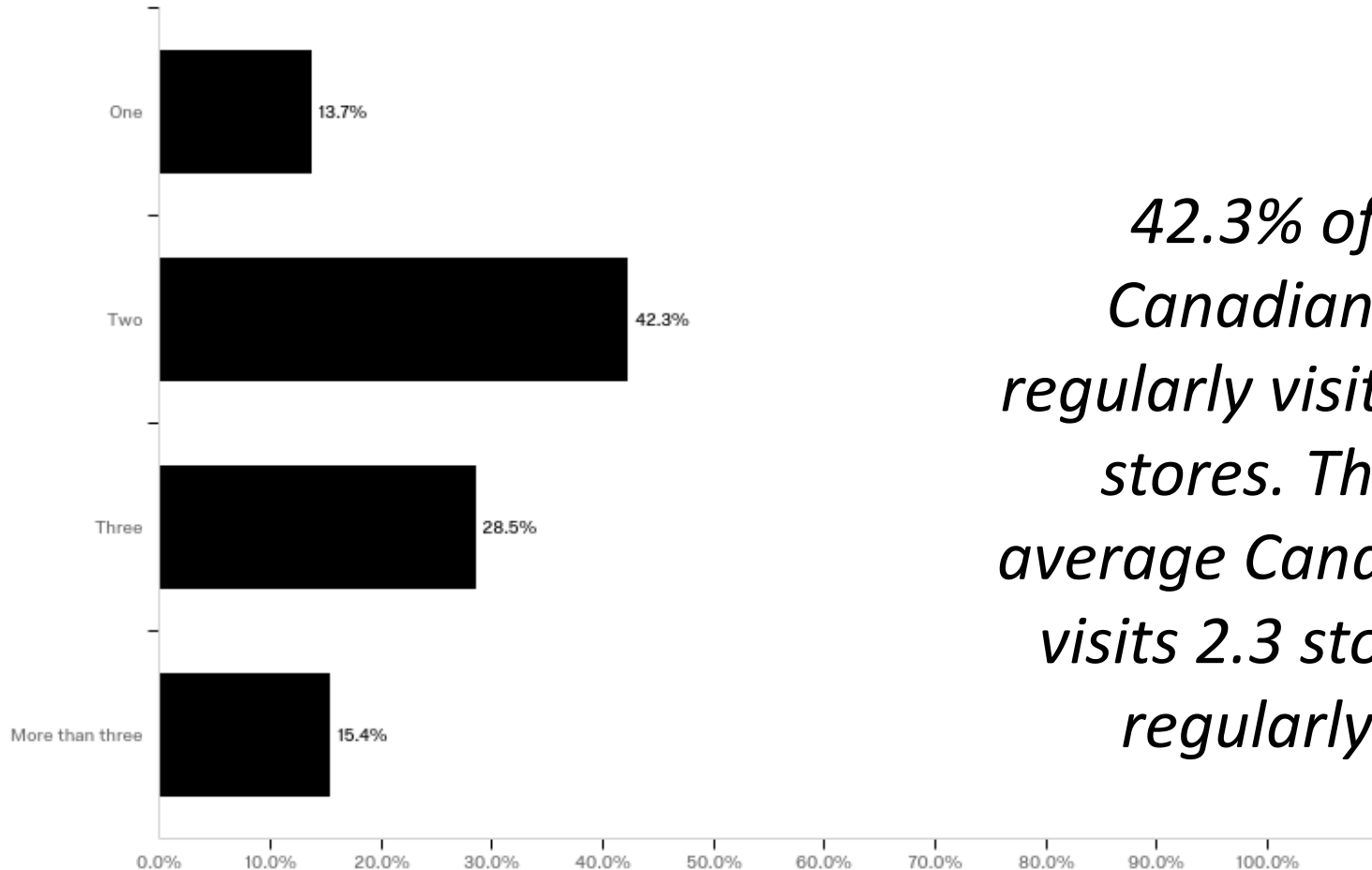
Do you like spicy foods?



How often do you eat spicy food?

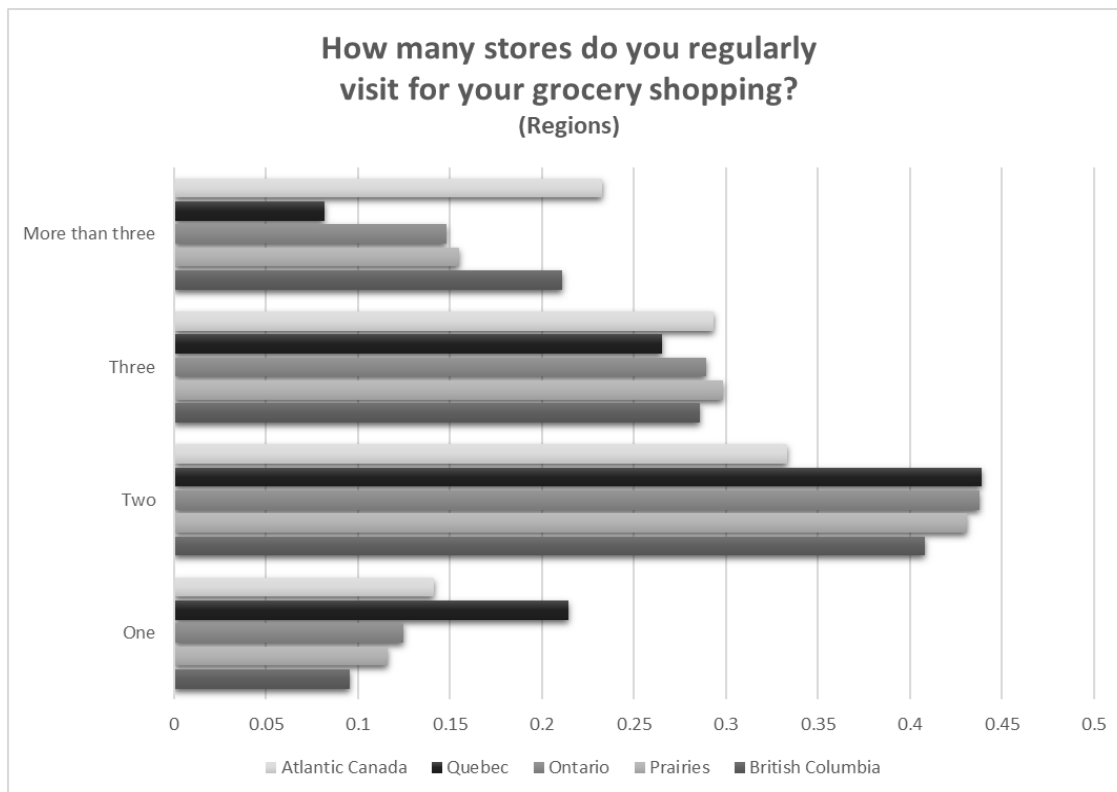


How many stores do you regularly visit for your grocery shopping?



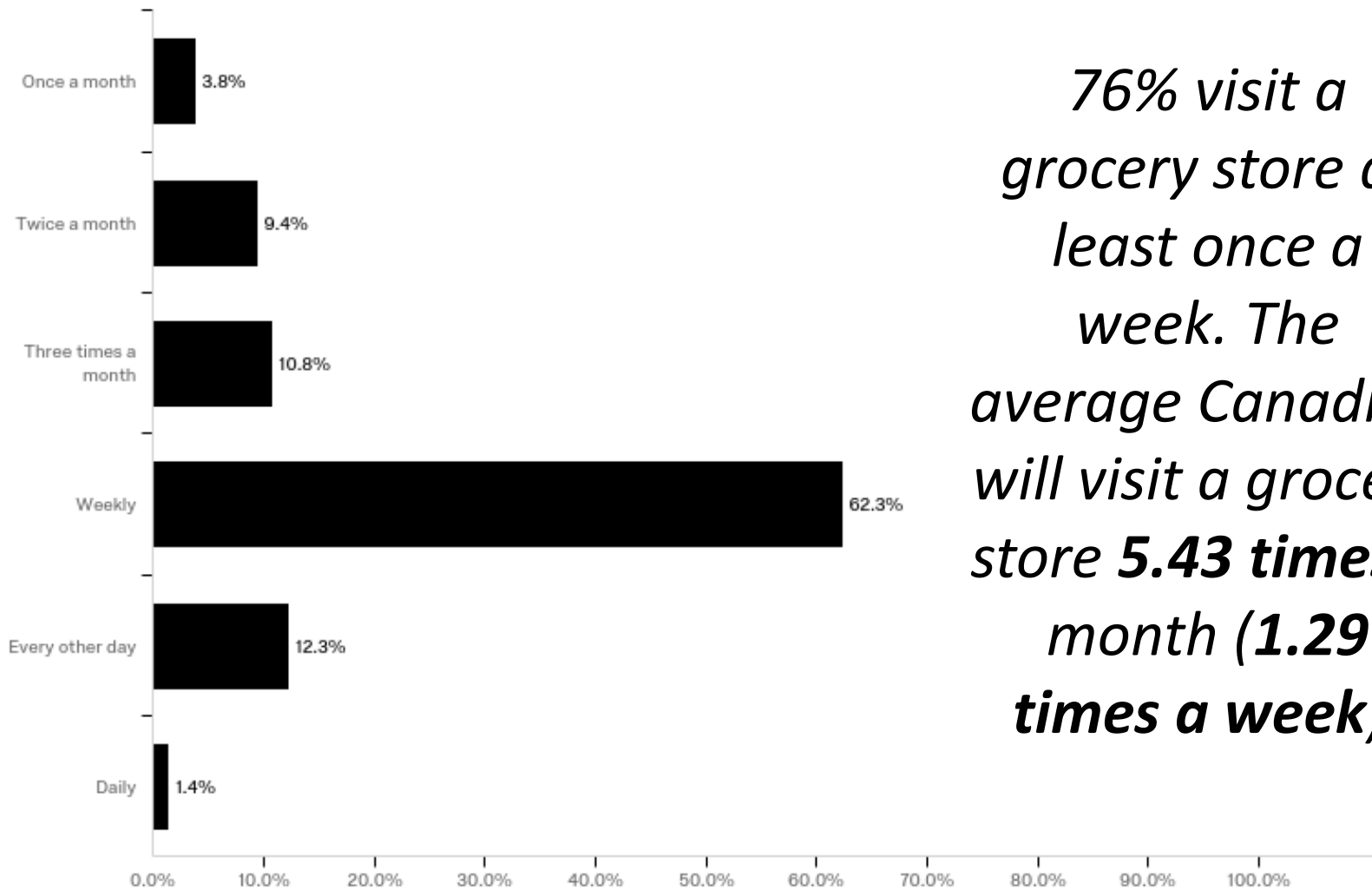
42.3% of Canadians regularly visit two stores. The average Canadian visits 2.3 stores regularly.

How many stores do you regularly visit for your grocery shopping?



More than 20% of Quebecers only visit one grocery store while almost 25% of Atlantic Region respondents visit more than three stores regularly

How often do you visit a store where you purchase food?



*76% visit a grocery store at least once a week. The average Canadian will visit a grocery store **5.43 times a month (1.29 times a week).***

How often do you visit a store where you purchase food?



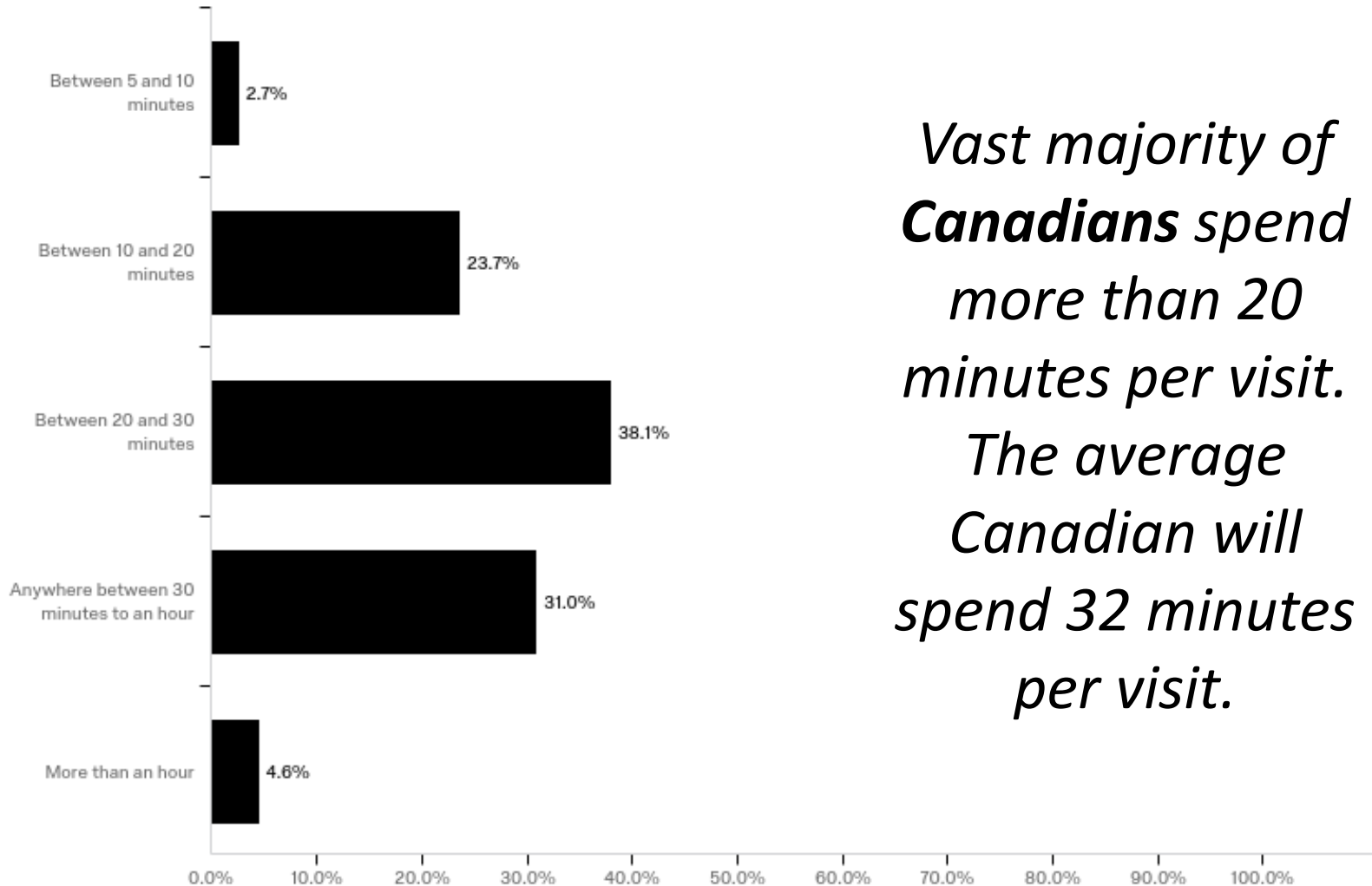
Younger respondents tend to visit grocery stores less frequently

How often do you visit a store where you purchase food?



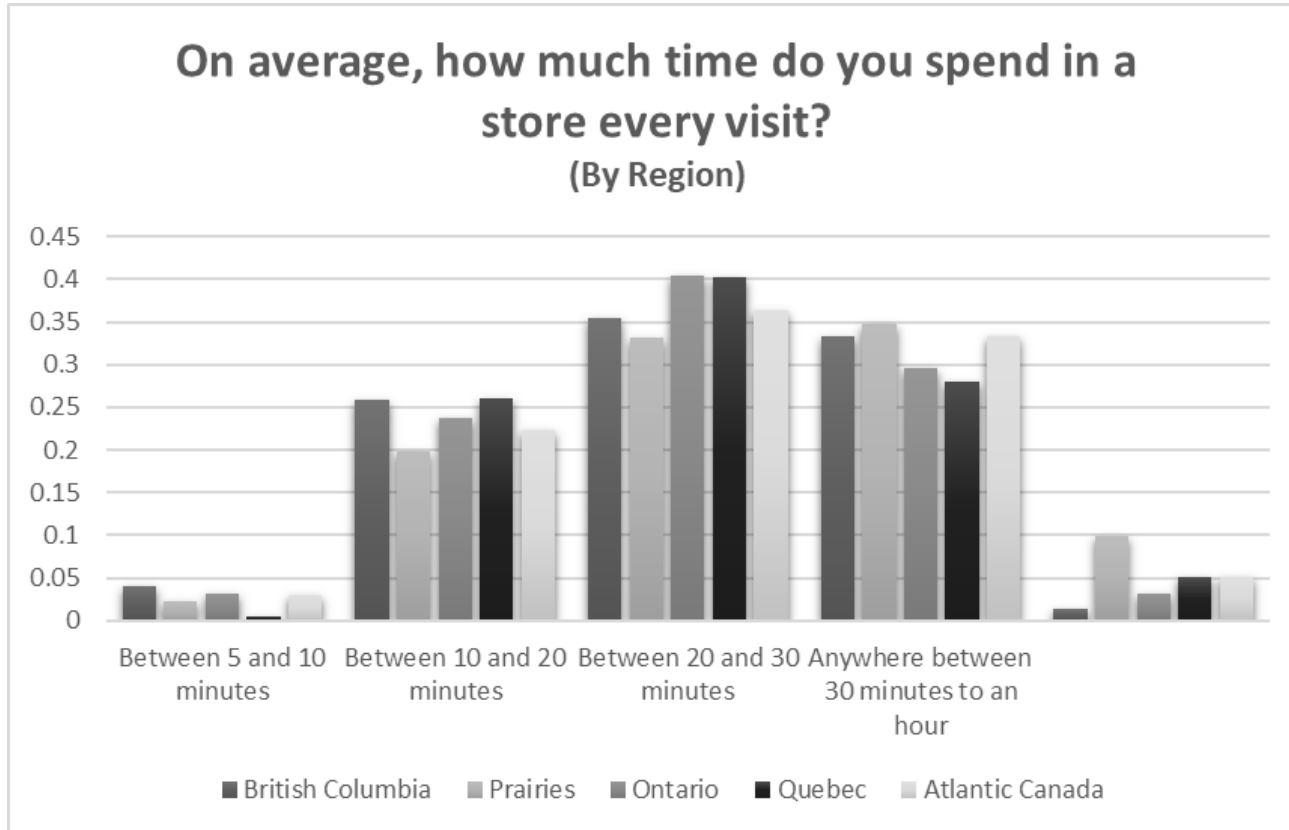
*24% of respondents from **British Columbia** visit a store every other day*

On average, how much time do you spend in a store every visit?



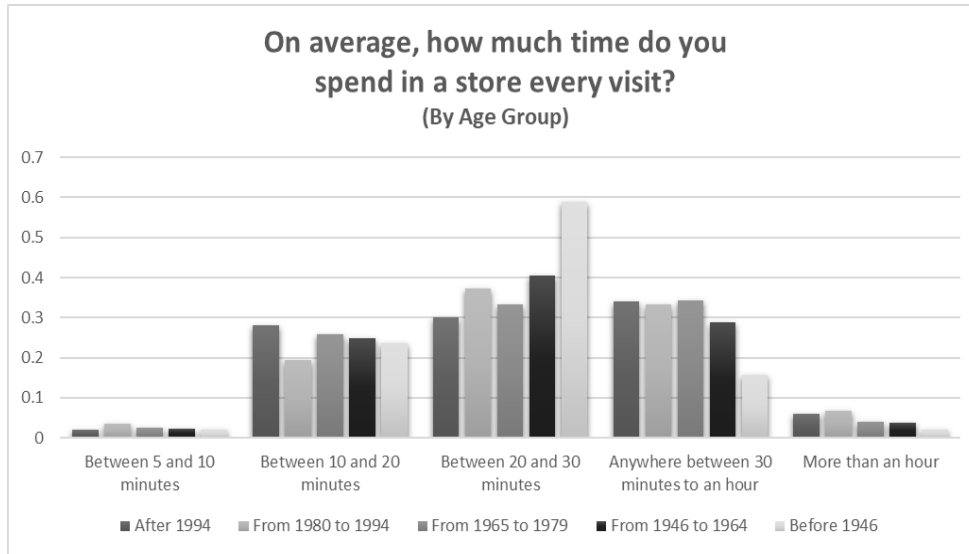
Vast majority of Canadians spend more than 20 minutes per visit. The average Canadian will spend 32 minutes per visit.

On average, how much time do you spend in a store every visit?

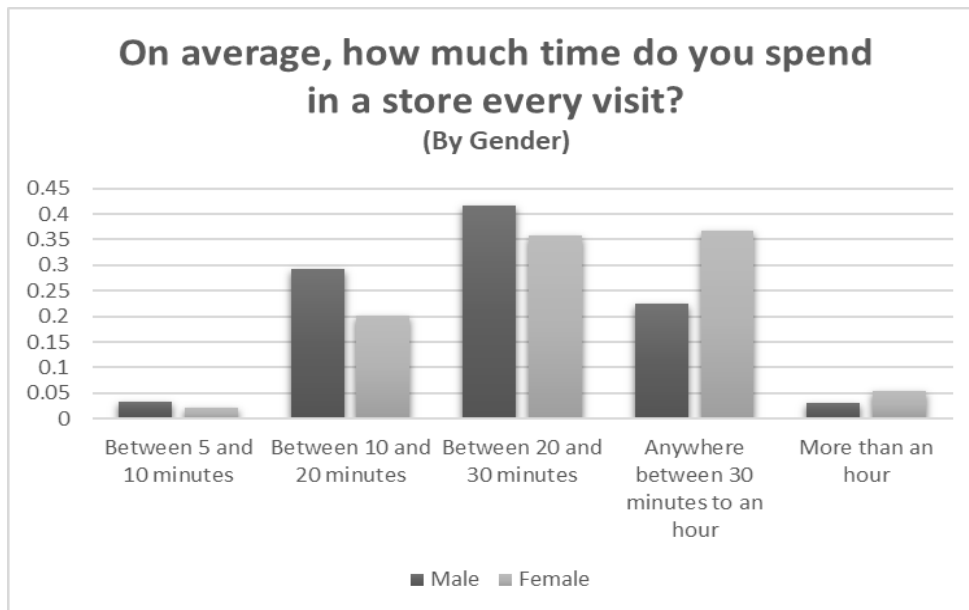


British Columbians appear to spend less time per visit, while respondents in the **Prairies** spend more time

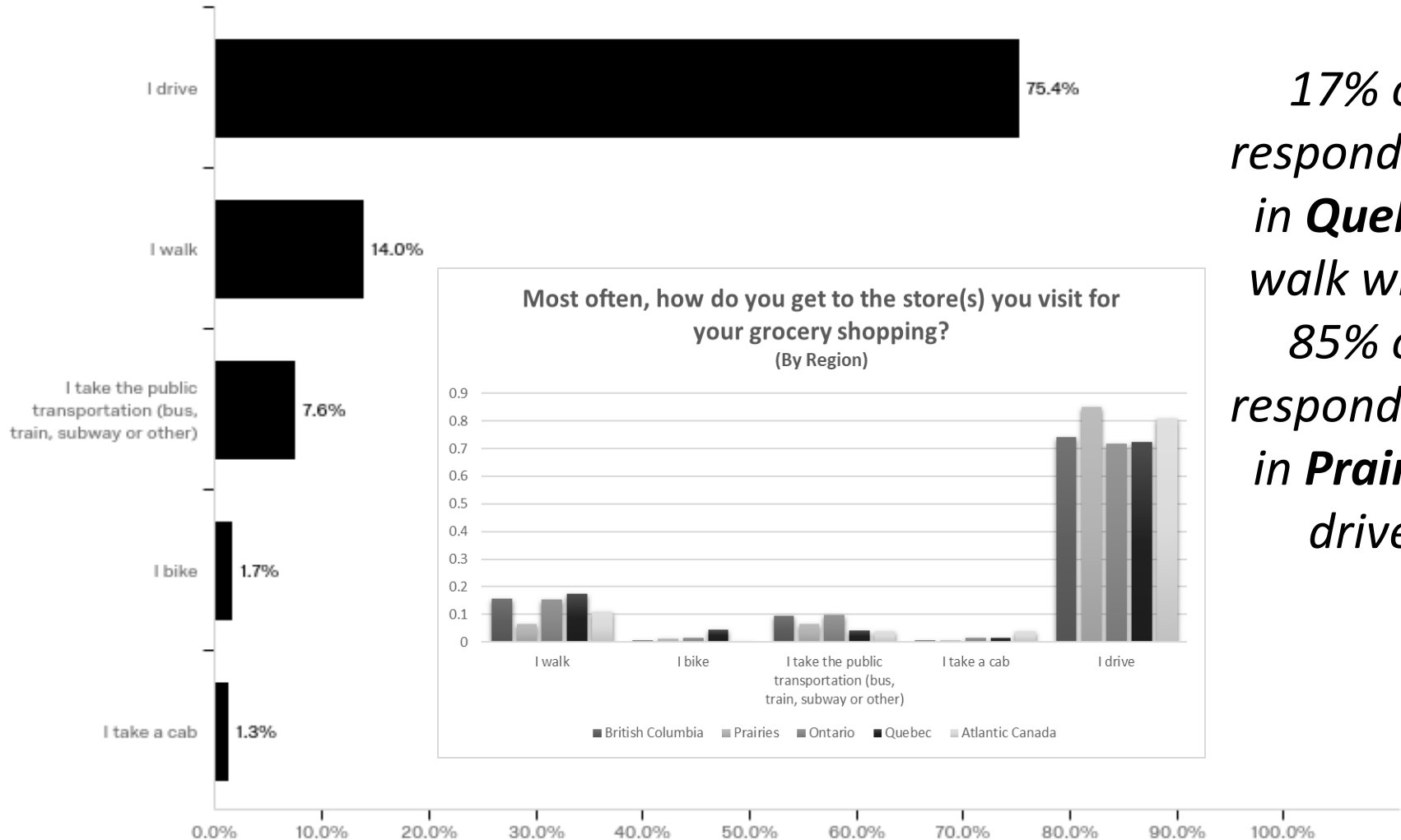
On average, how much time do you spend in a store every visit?



*Almost 60% of respondents born **before 1946** spend between **20 to 30 minutes** per visit. **Women** tend to spend more time per visit.*



Most often, how do you get to the store(s) you visit for your grocery shopping?



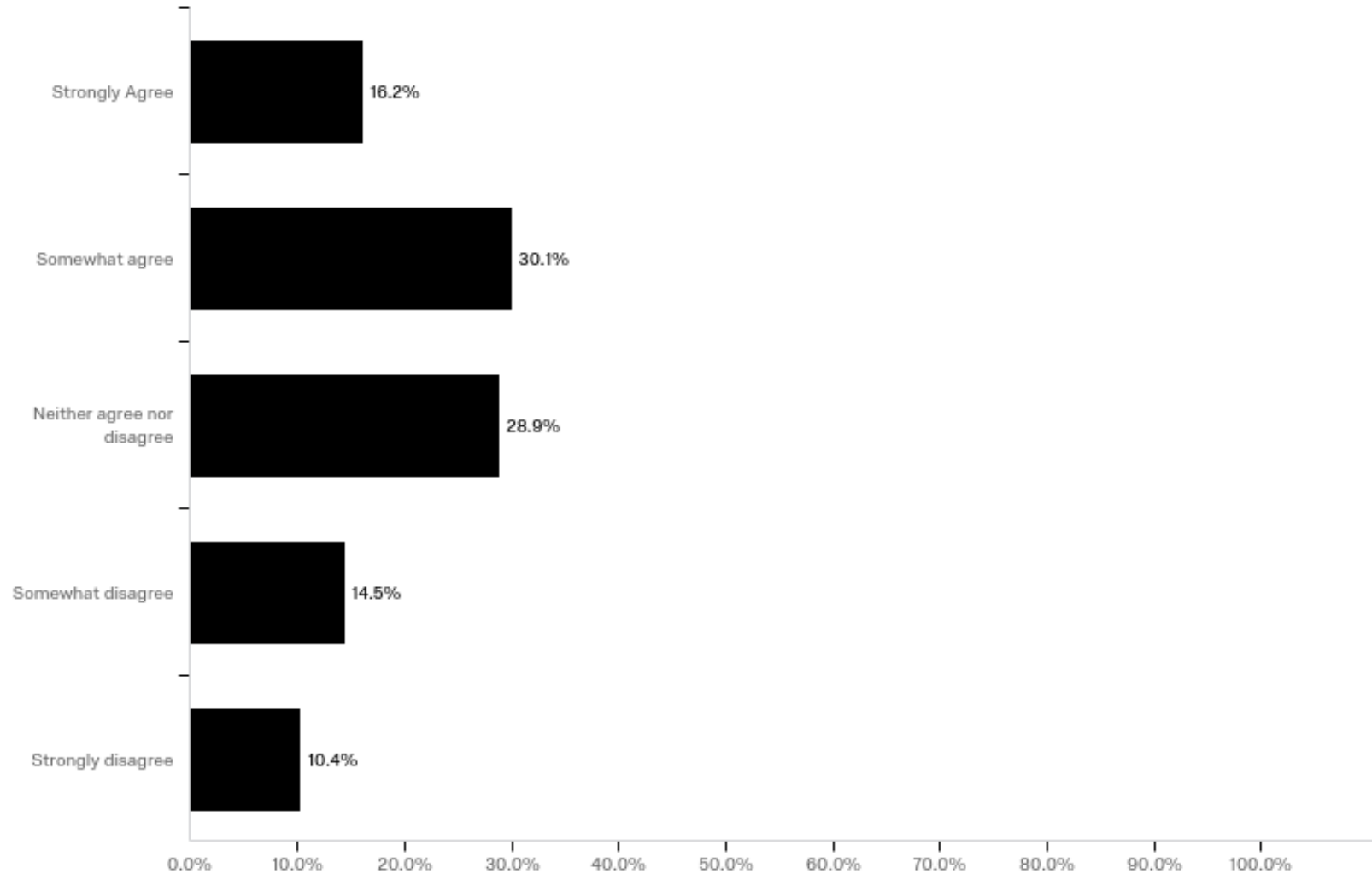
17% of respondents in Quebec walk while 85% of respondents in Prairies drive



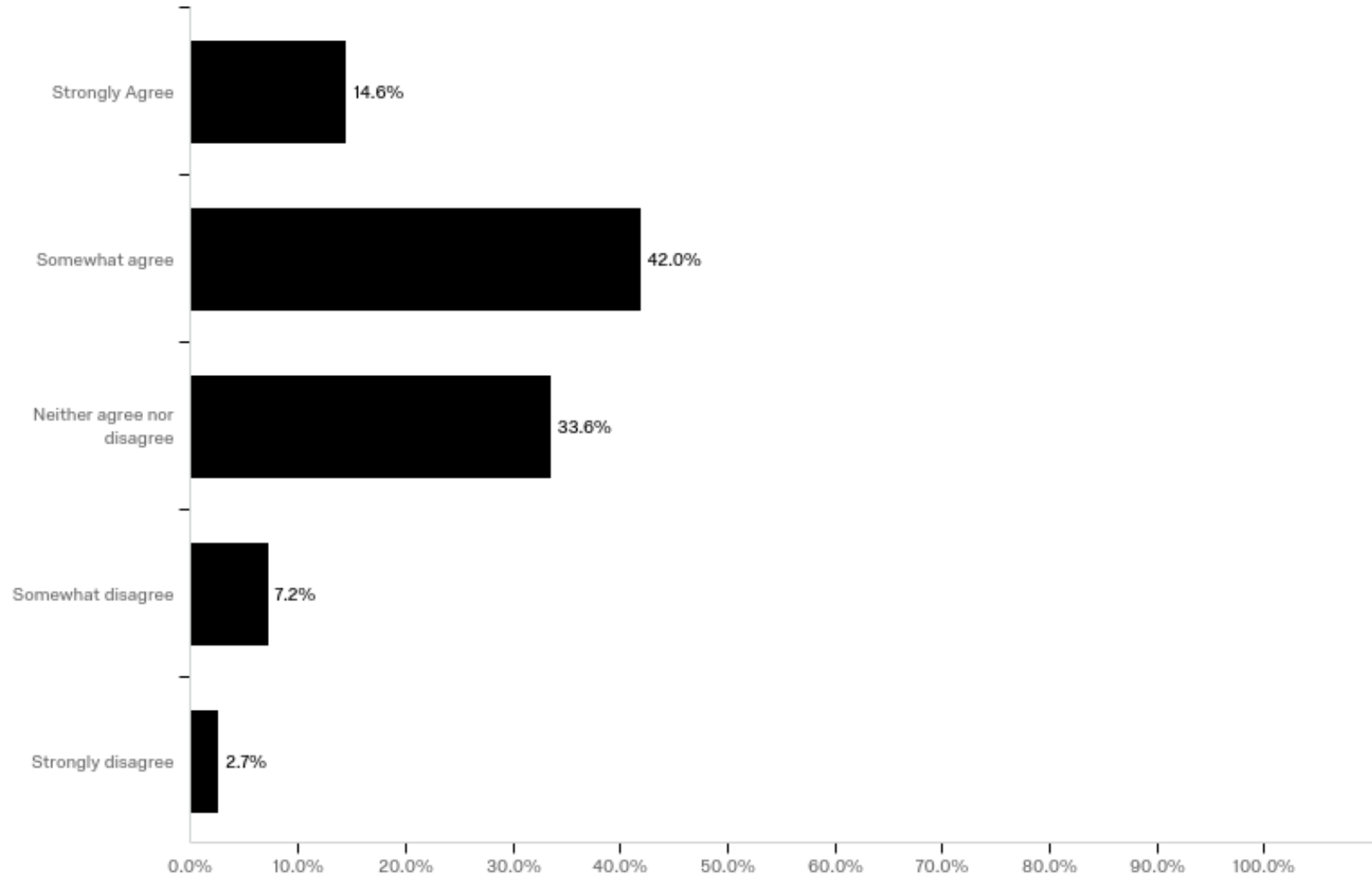
Service Specificity

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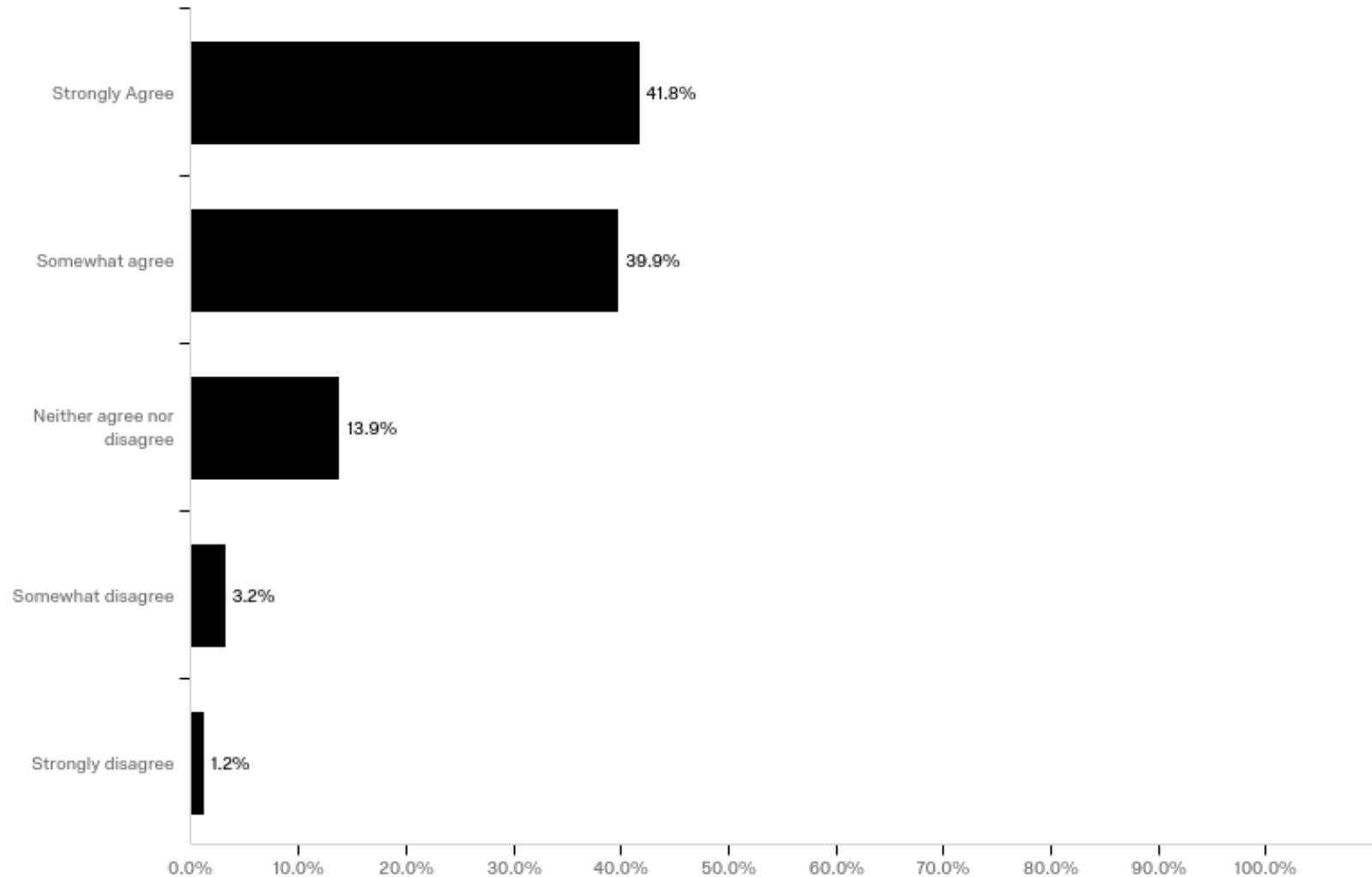
I enjoy talking and meeting people I know while grocery shopping



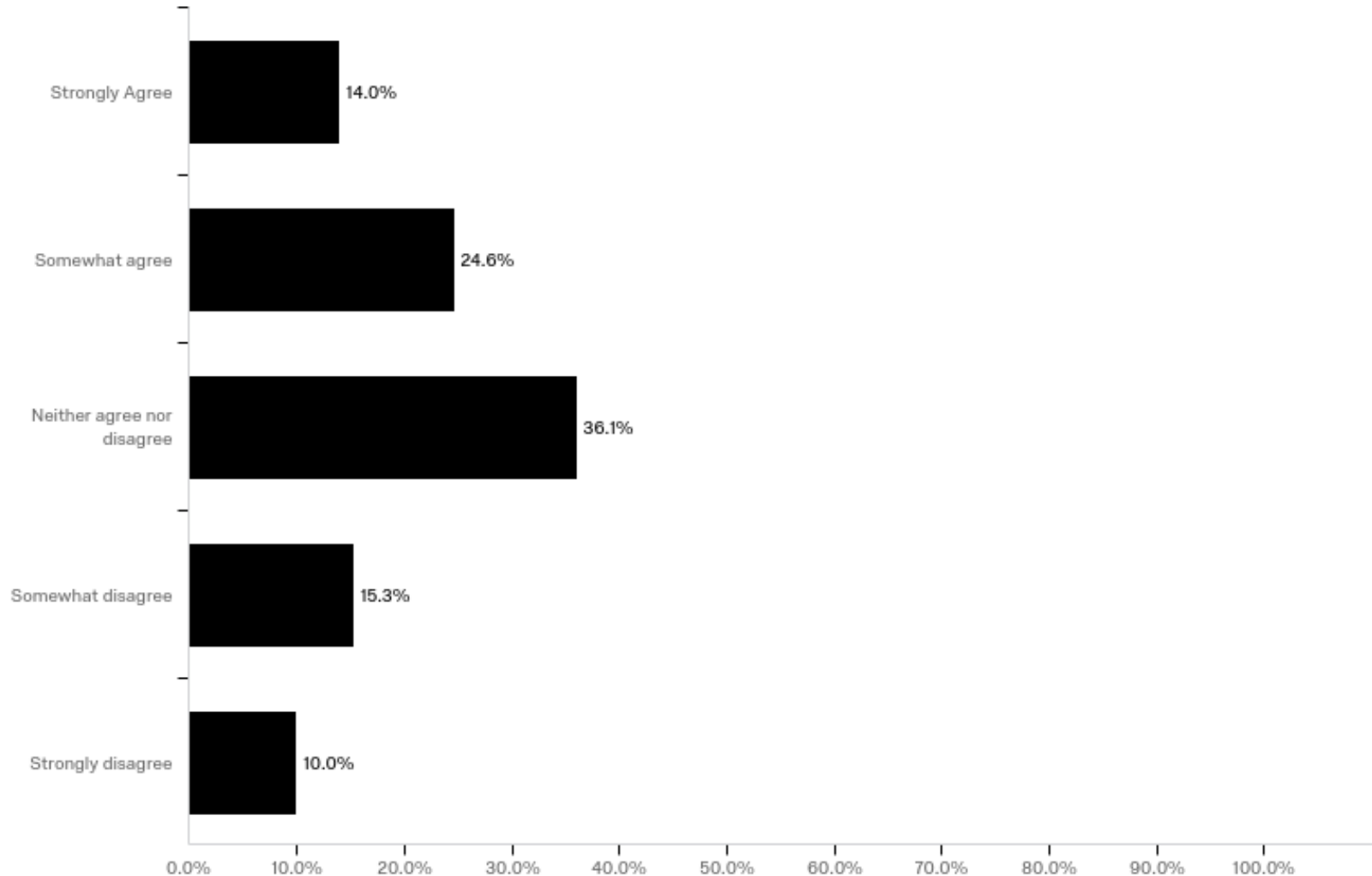
The inner store experience, and the design of the store is very important to me



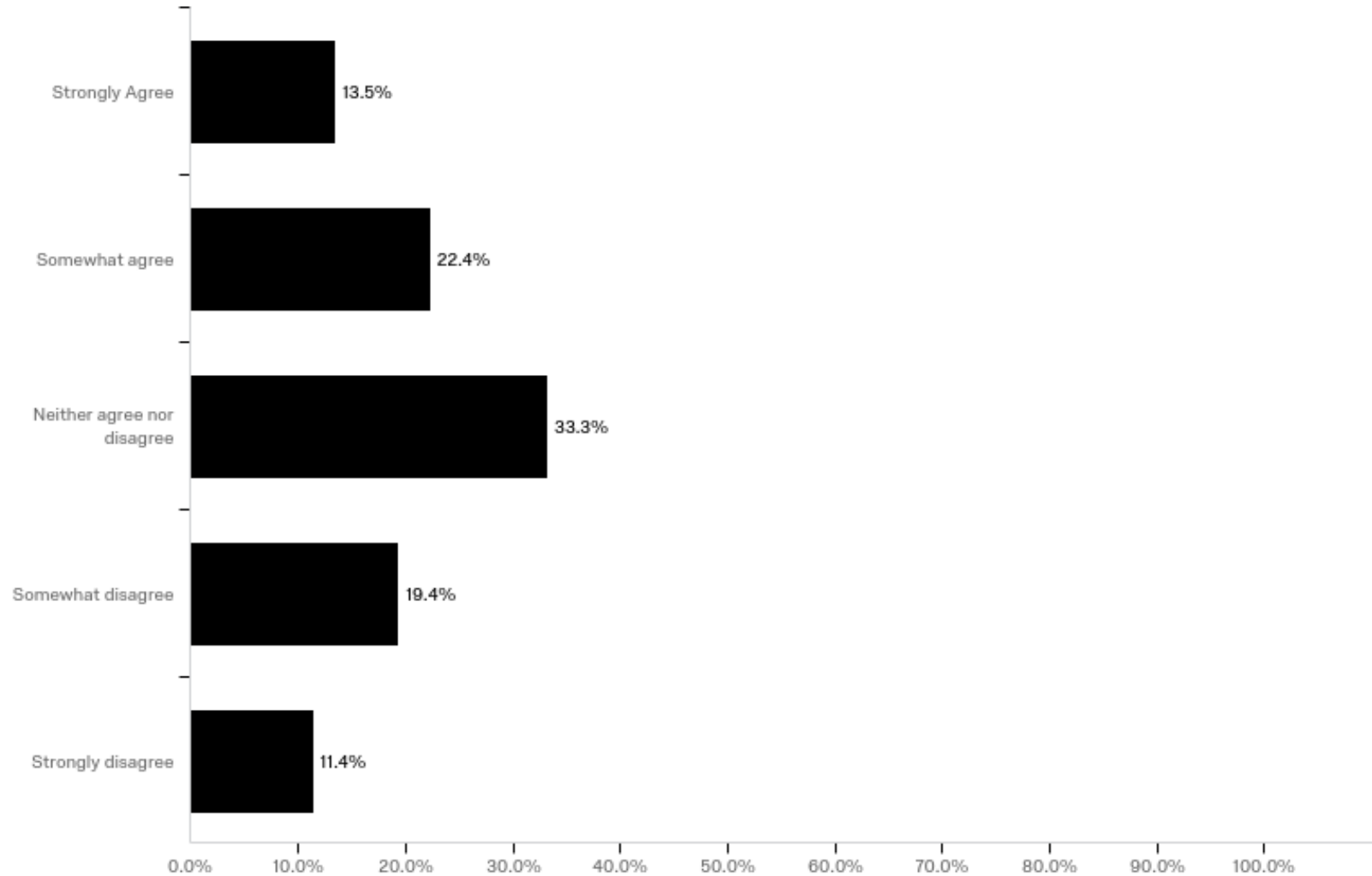
It is important for me to be able to ask for some assistance if I need it when I grocery shop



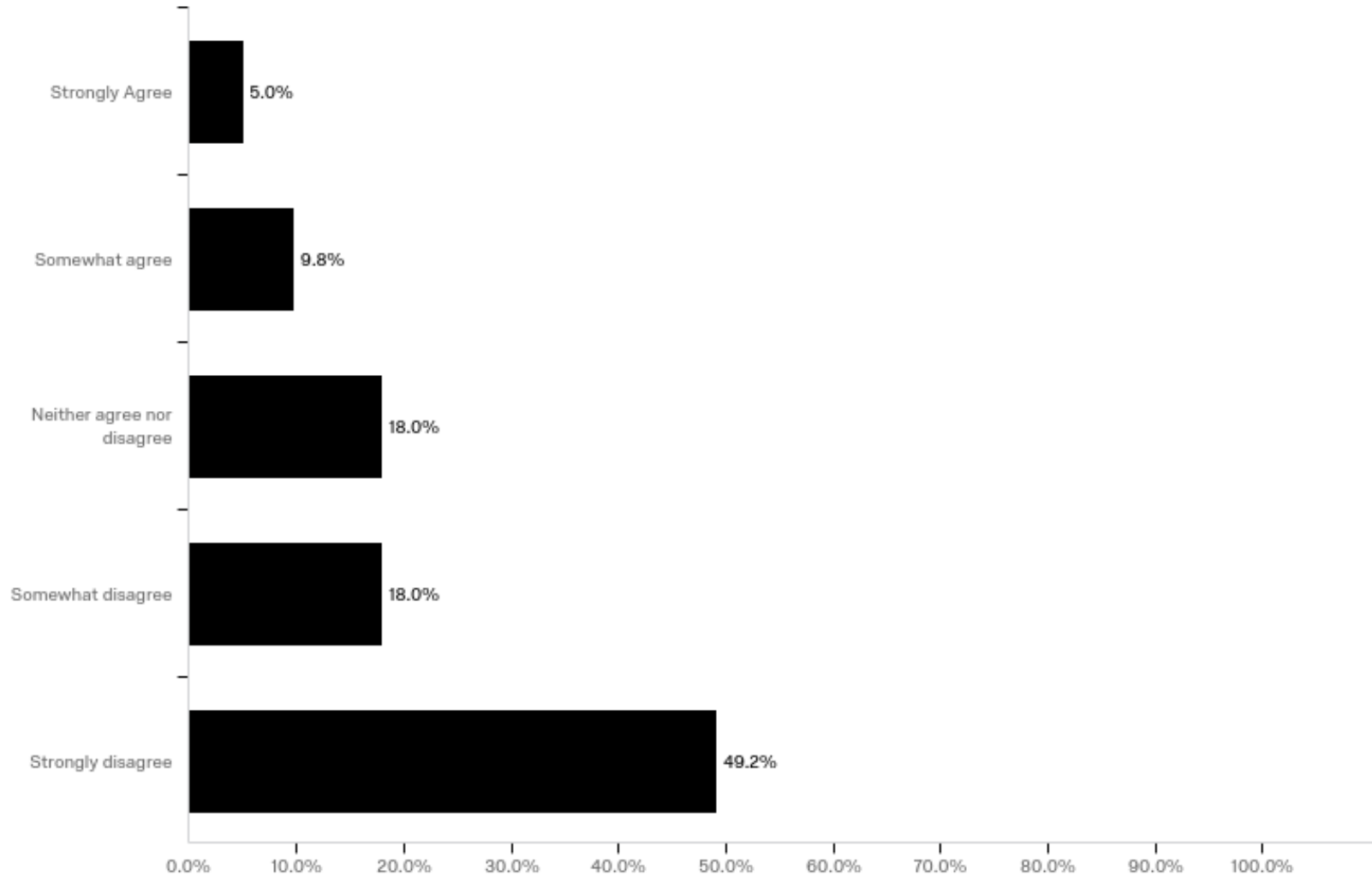
It is important for me to know I can talk to the owner or the manager at any time during my visits to the grocery store



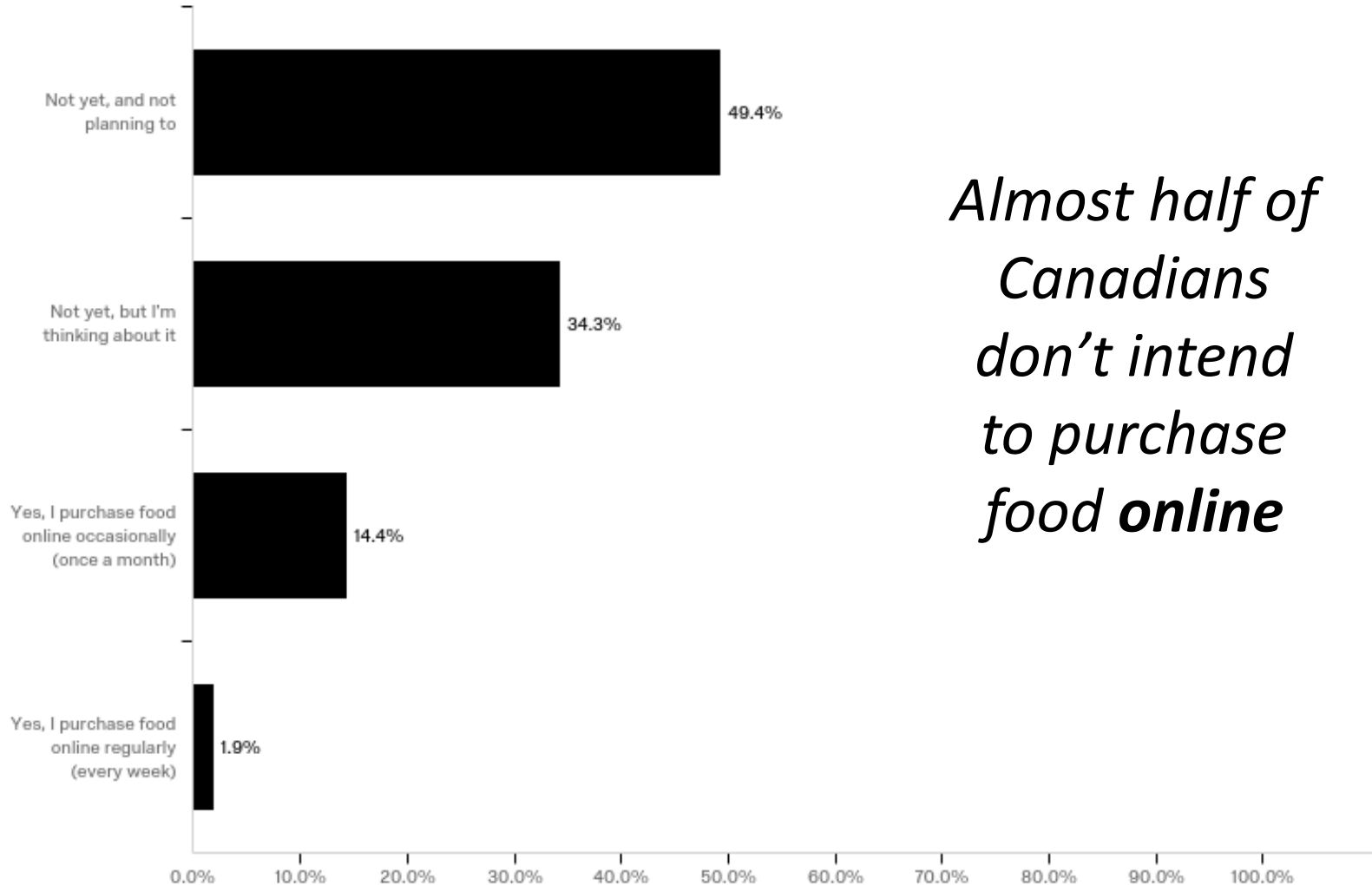
I prefer not to talk to anyone when visiting a grocery store



I subscribe to a meal kit service or I am thinking of using a meal kits service eventually



Have you purchased groceries online?



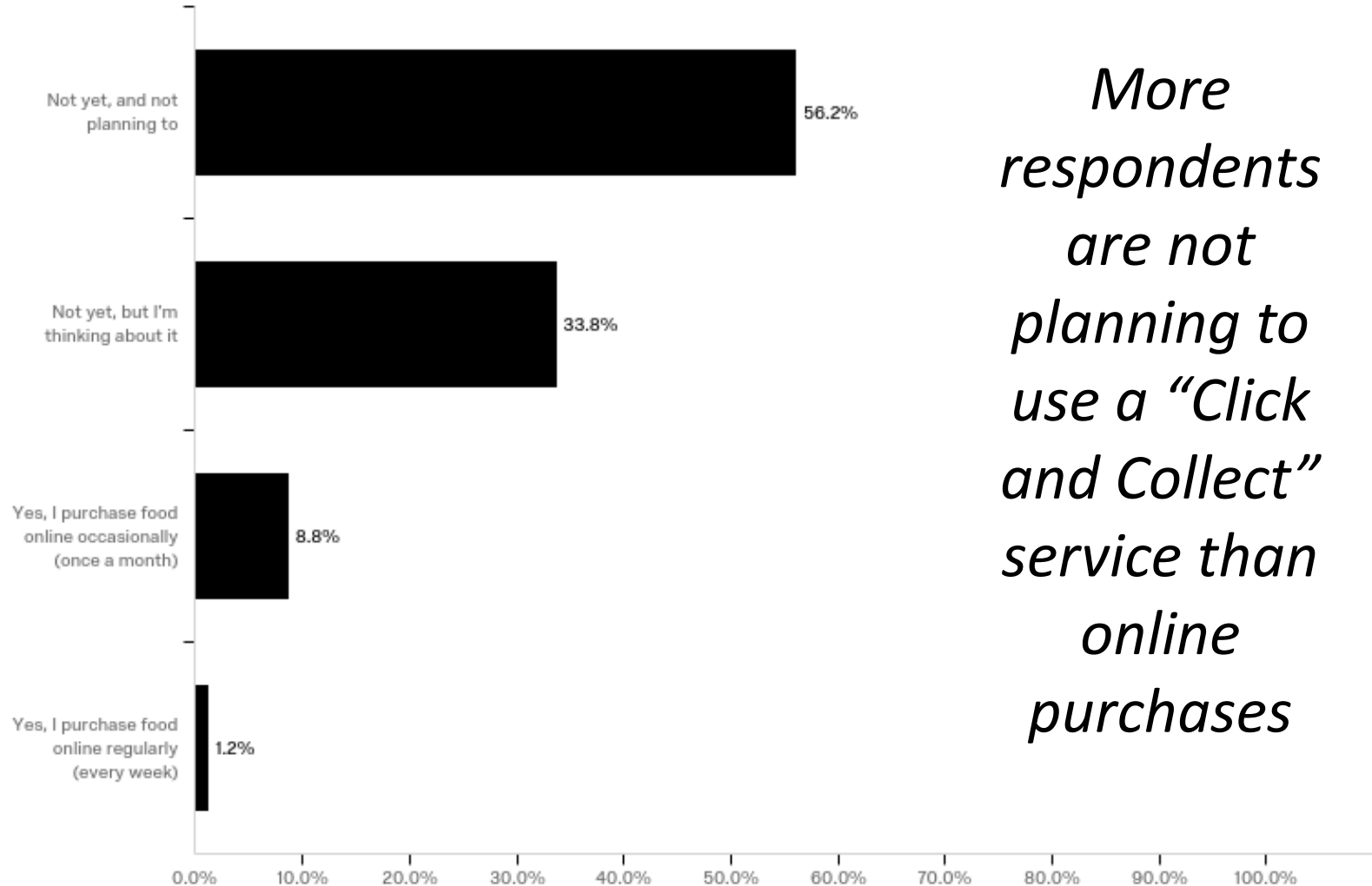
*Almost half of Canadians don't intend to purchase food **online***

Have you purchased groceries online?



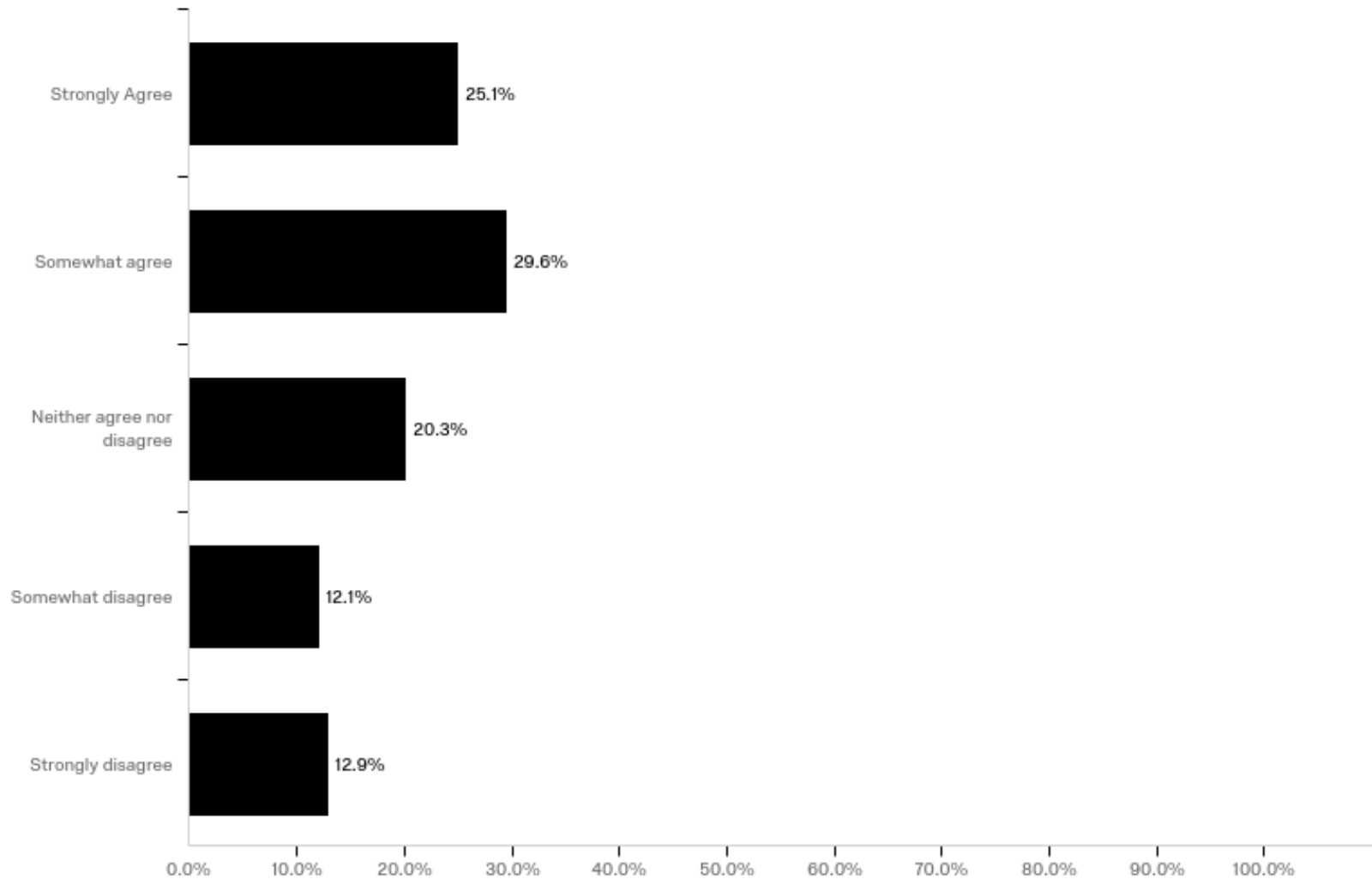
*More than
20% of
respondents
with a
university
degree have
purchased
food online*

Have you used a “click and collect” service before?

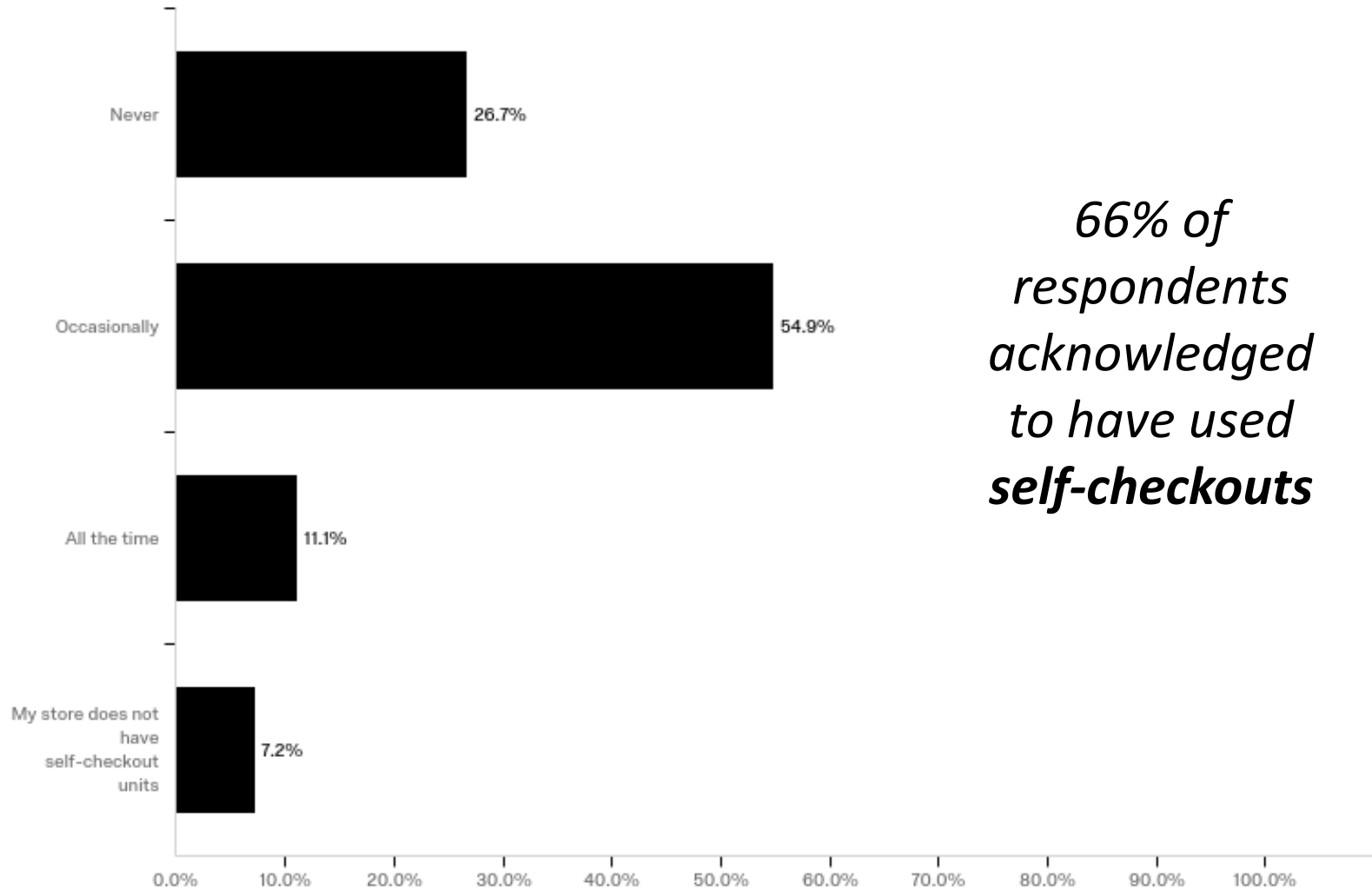


More respondents are not planning to use a “Click and Collect” service than online purchases

I think self-checkout lanes are a good idea

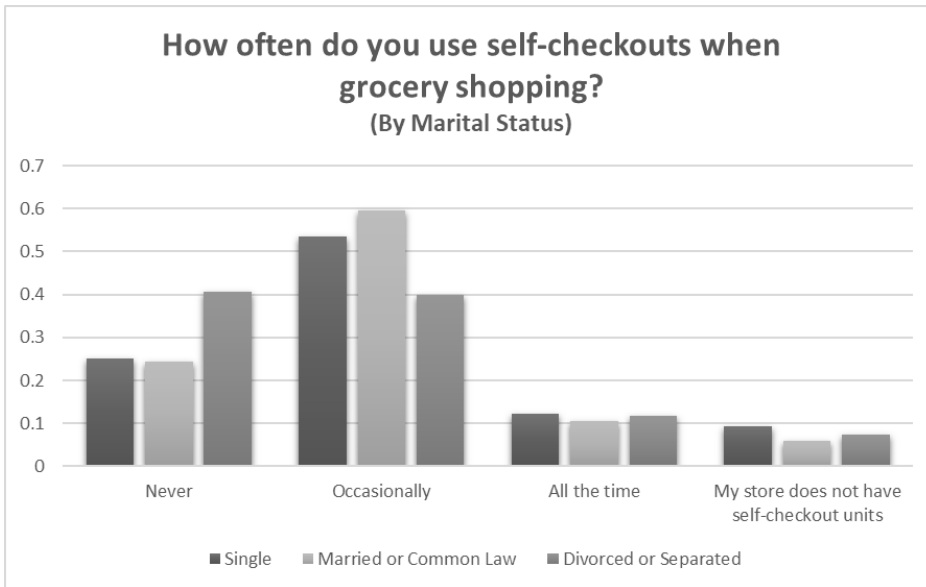


How often do you use self-checkouts when grocery shopping?

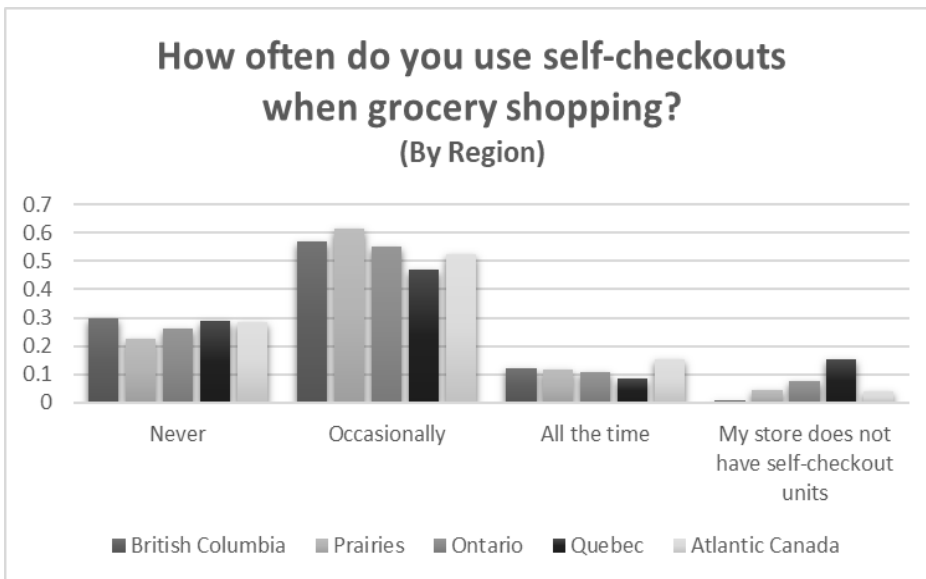


66% of respondents acknowledged to have used self-checkouts

How often do you use self-checkouts when grocery shopping?



*More than 40% of respondents who are **divorced or separated** have never used self-checkouts while respondents from **Quebec** appear to be using self-checkouts less frequently*

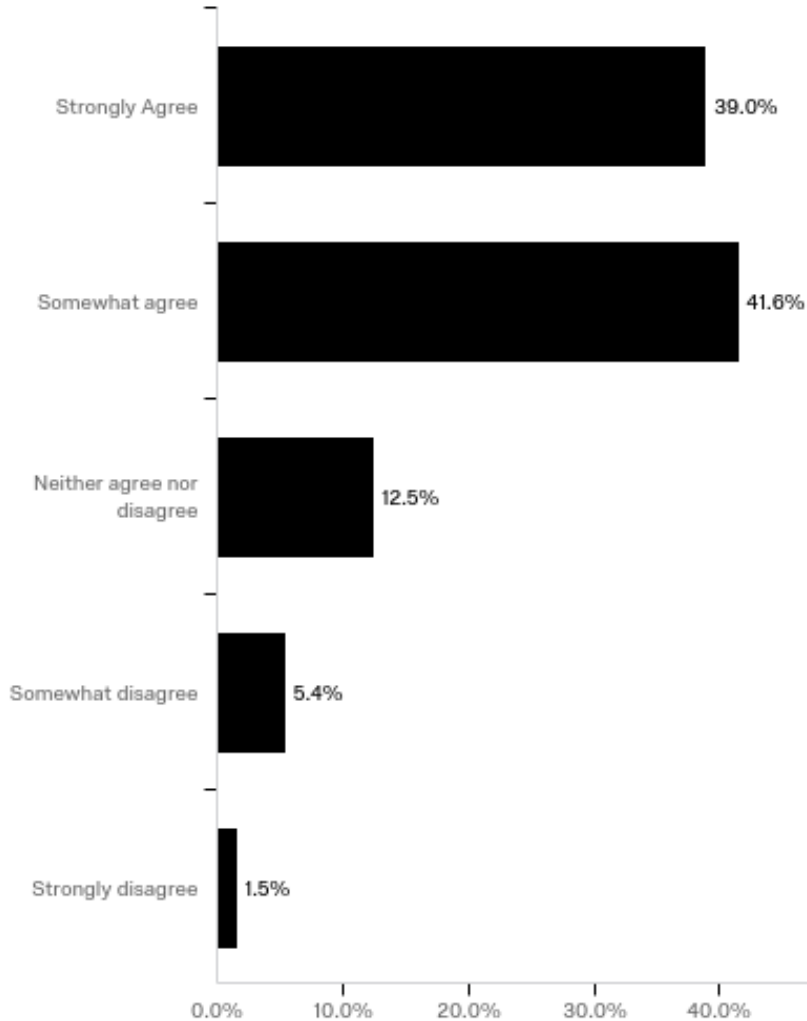




Ownership, Management and Asset

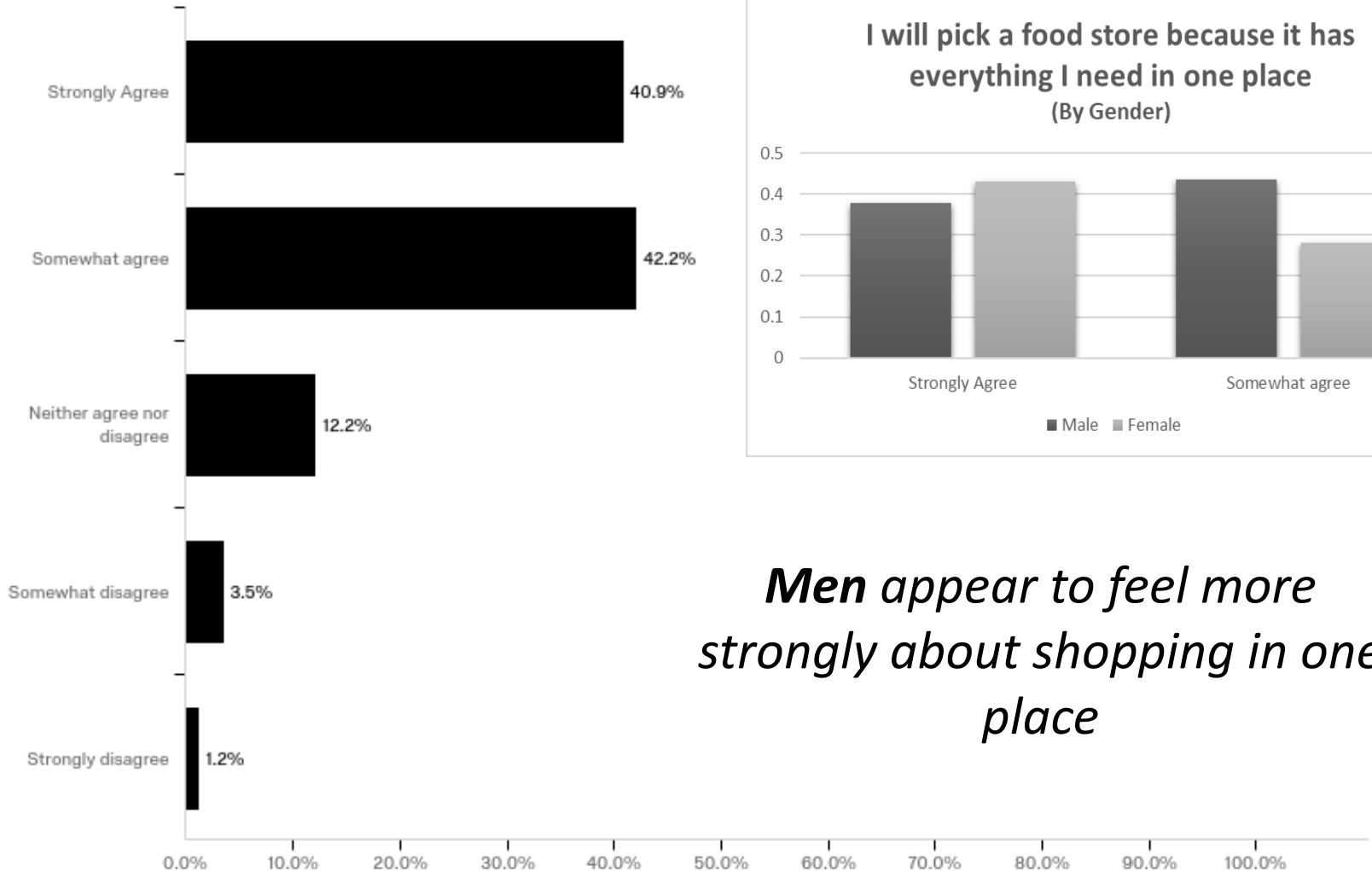
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I will pick a food store based on where it is located



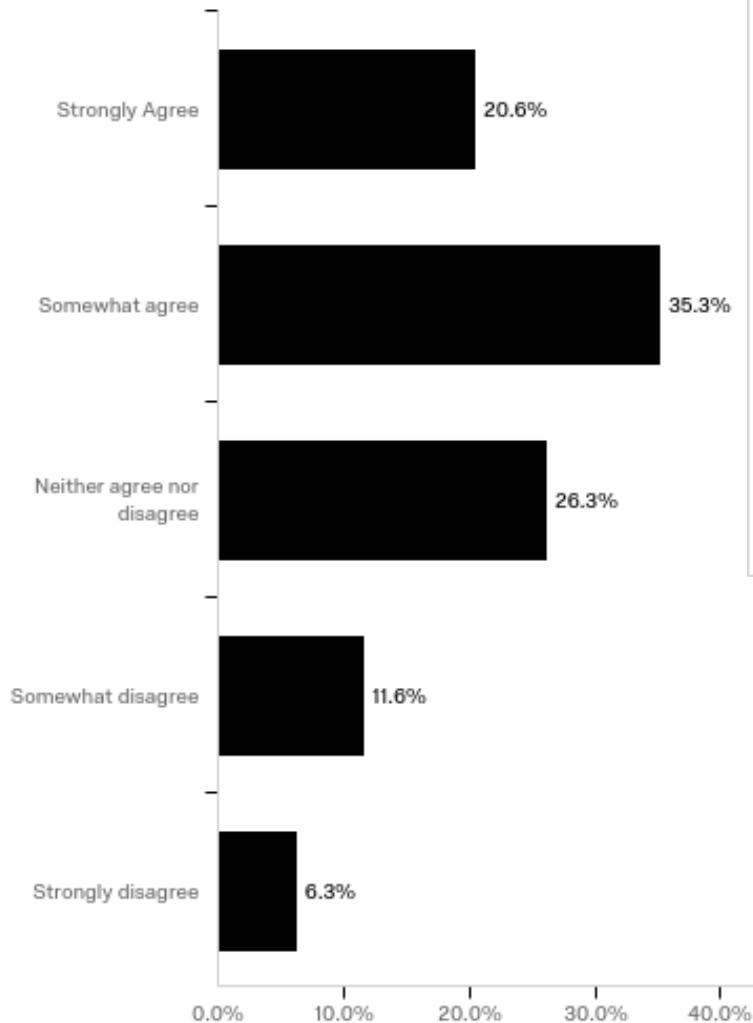
*Slight trend: **Higher income earners** appear to prioritize location, more so than lower income earners*

I will pick a food store because it has everything I need in one place



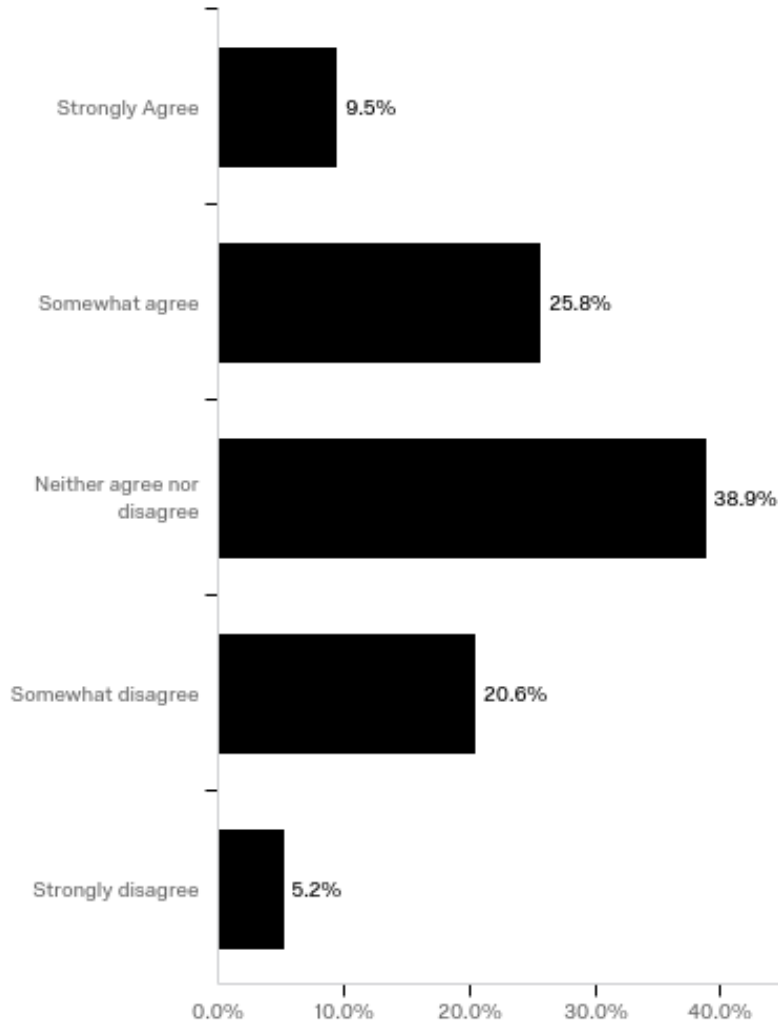
Men appear to feel more strongly about shopping in one place

I really enjoy walking in very large food stores



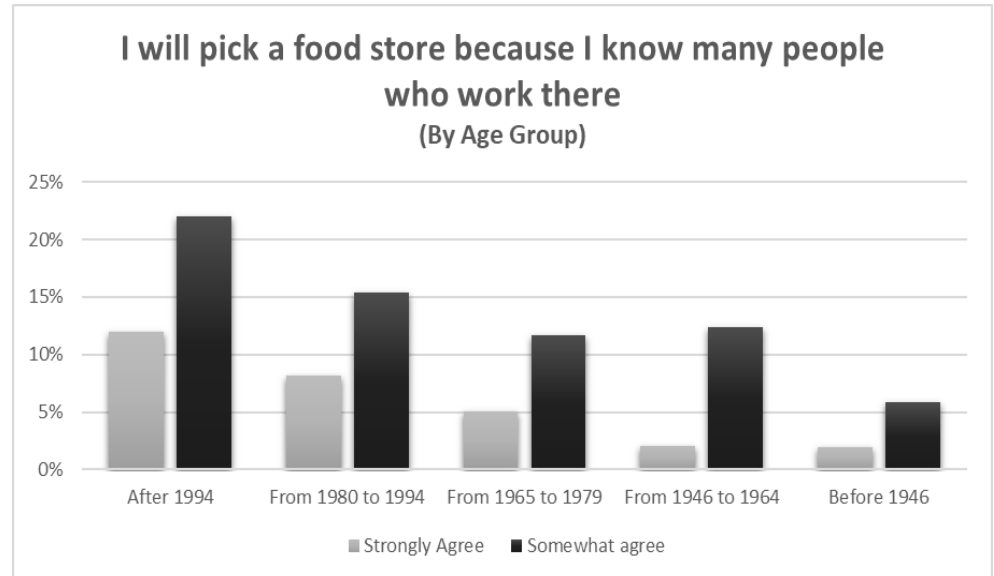
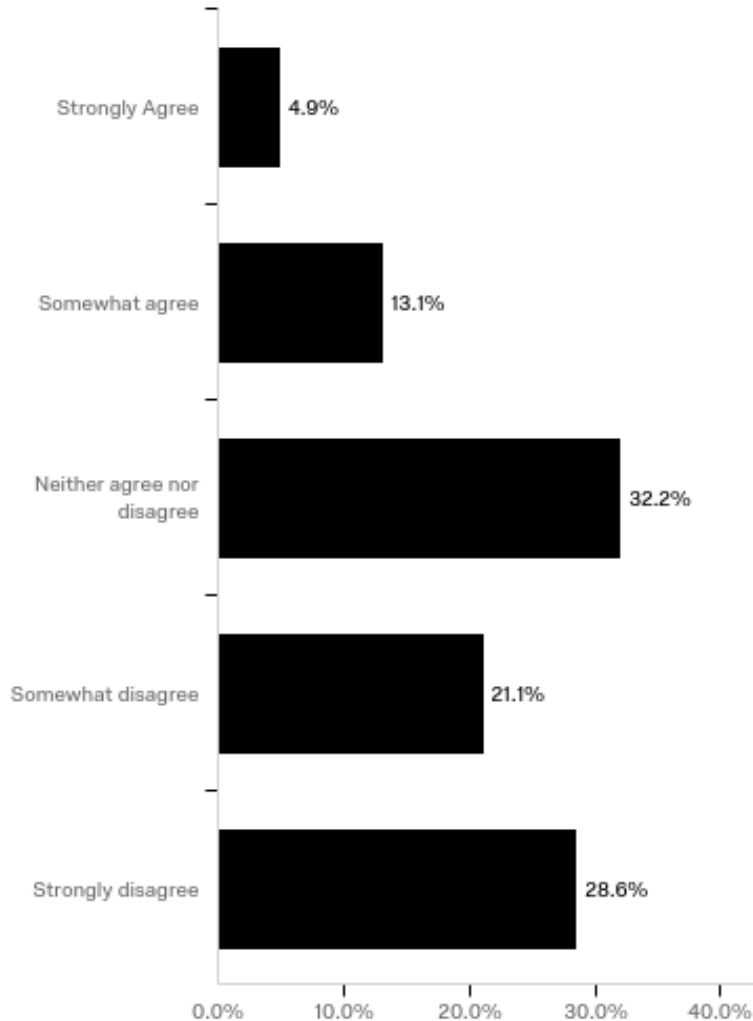
*Respondents **with no children** less likely to enjoy large food stores*

I prefer visiting smaller stores where I can quickly see everything the store has to offer



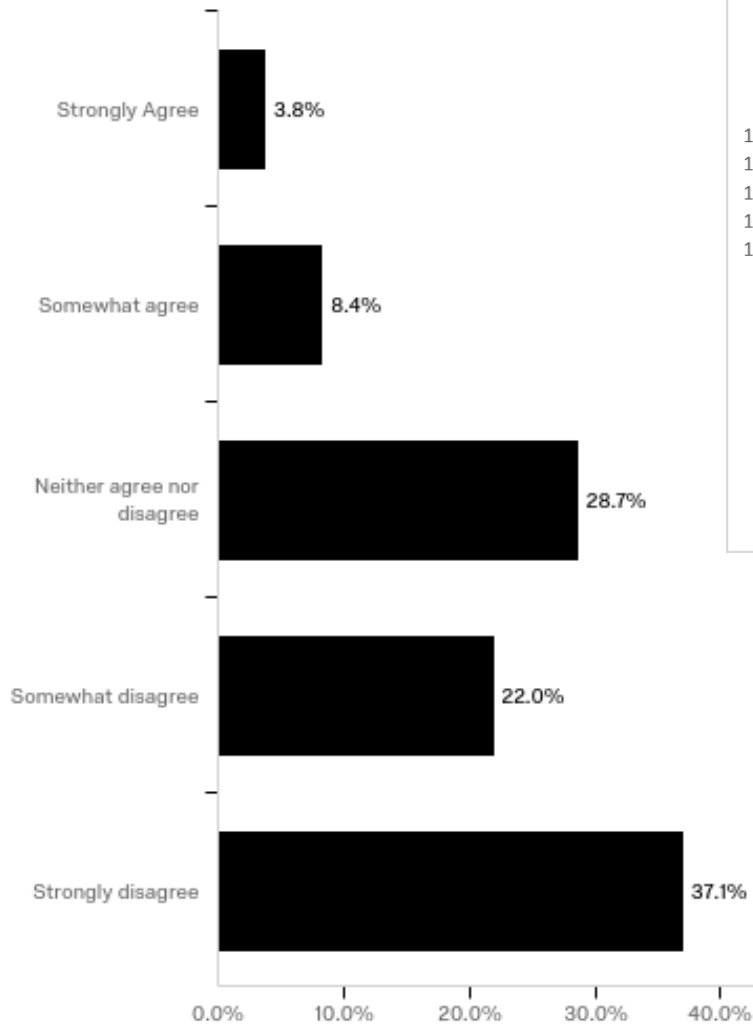
*Slightly more interest in stores where everything can be seen quickly in both **Ontario** and **Quebec***

I will pick a food store because I know many people who work there



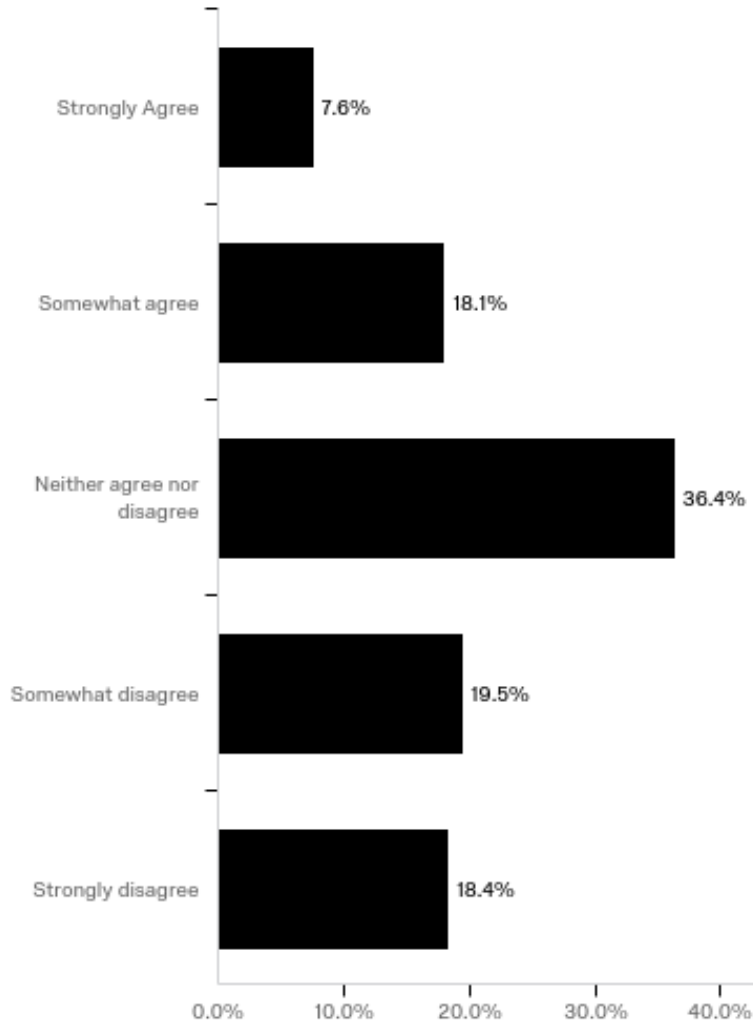
Strong correlation between age group and knowing people who work in food store

I will pick a food store because I personally know the manager



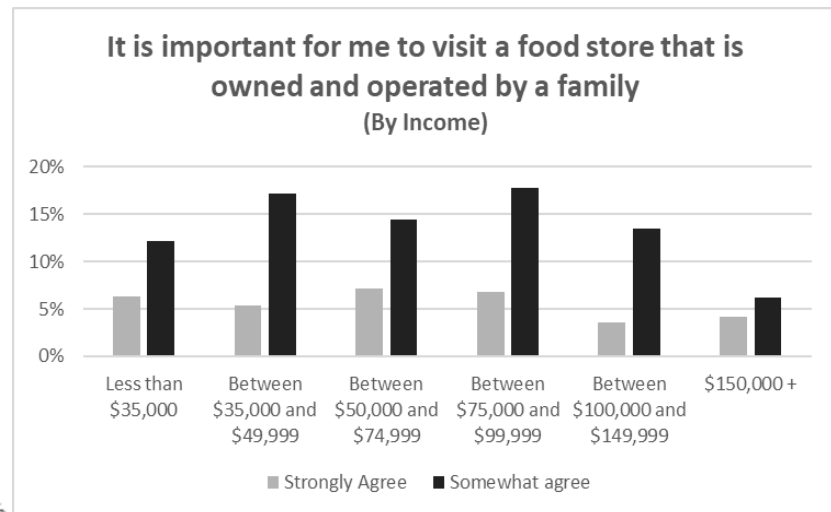
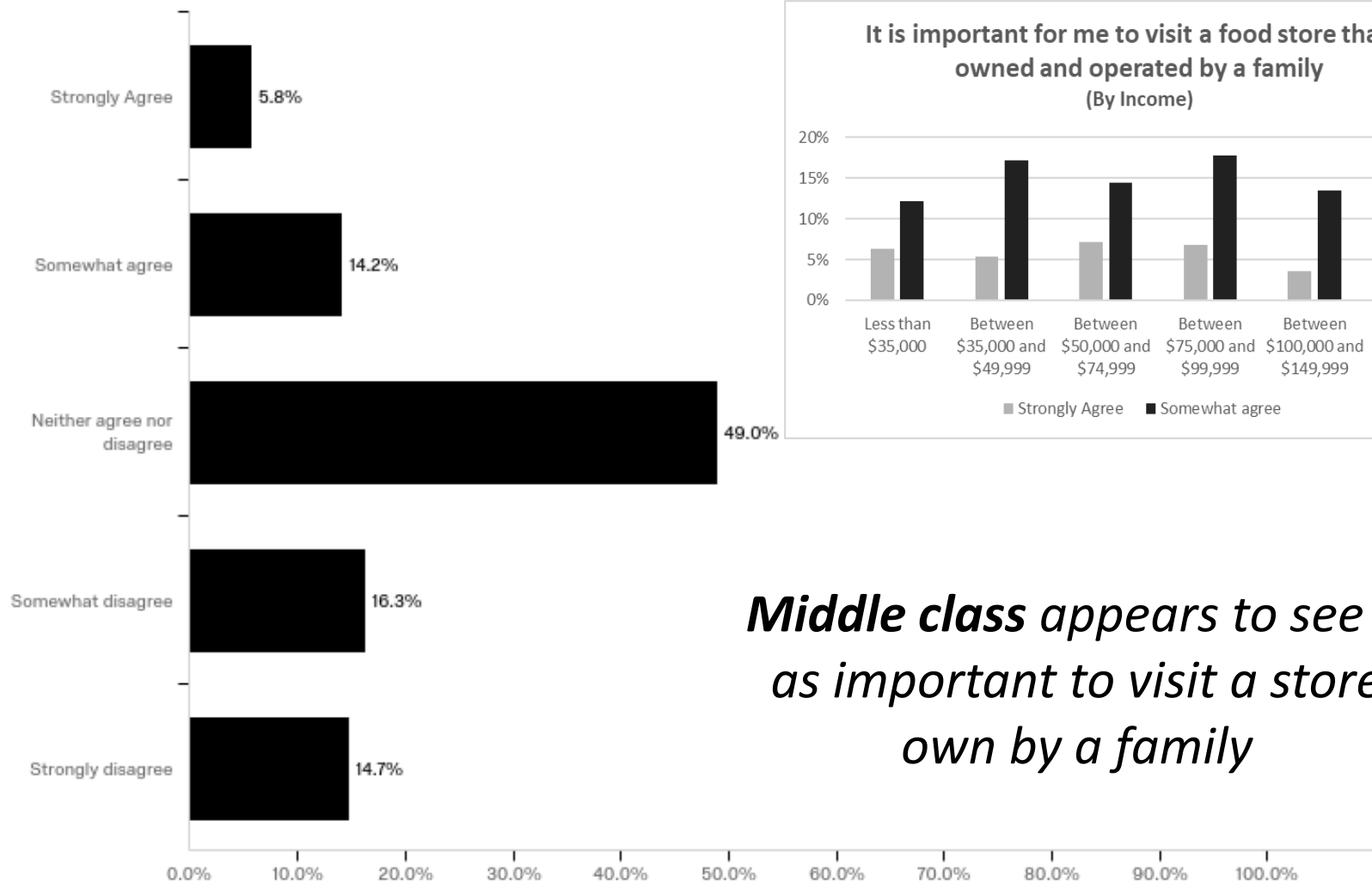
Respondents earning \$75k to \$99,999 are more likely to appreciate knowing the manager

Knowing who owns the food store I visit regularly is important to me



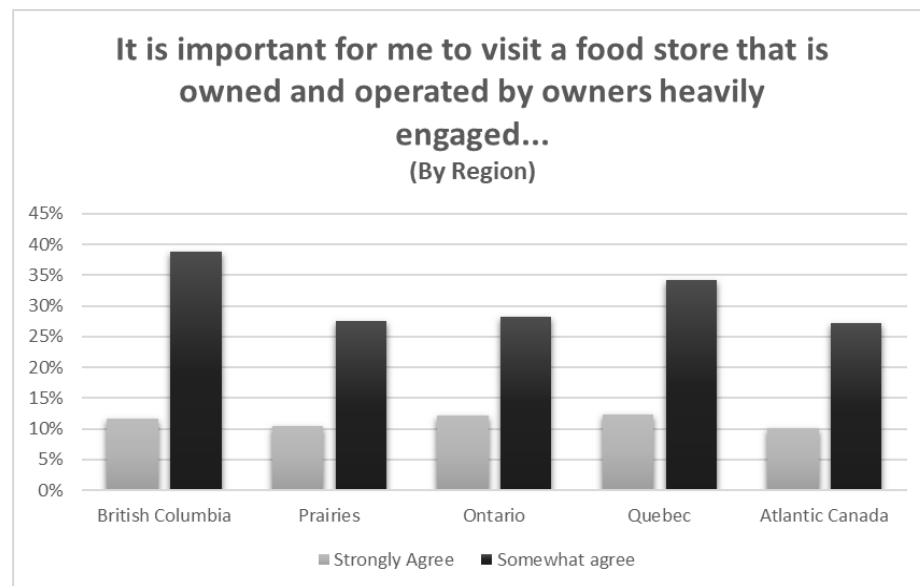
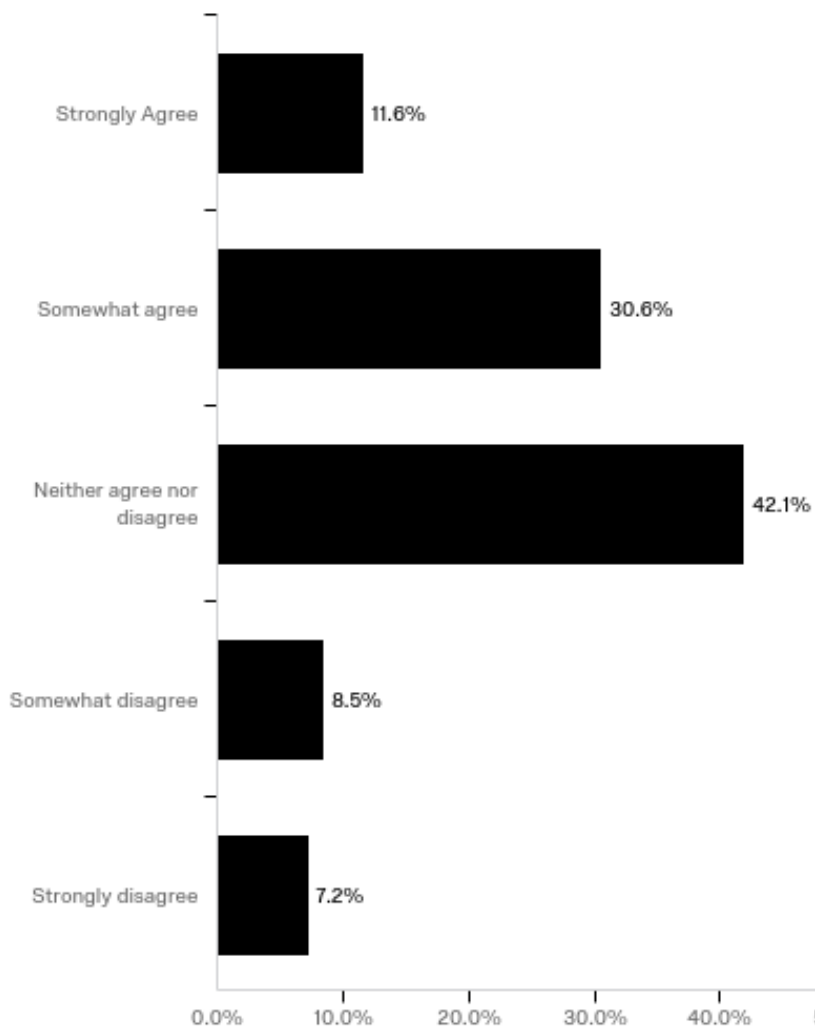
*Respondents from **Urban Cores** appear to want to know who owns the food store*

It is important for me to visit a food store that is owned and operated by a family



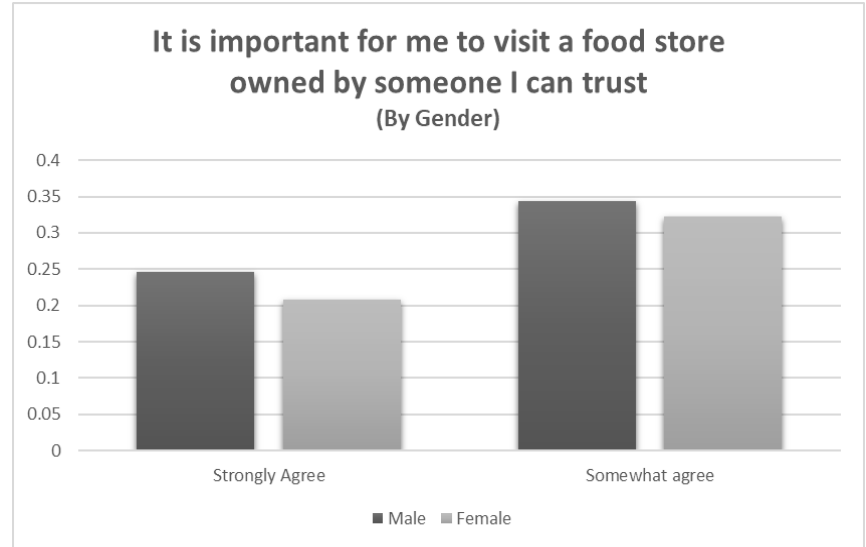
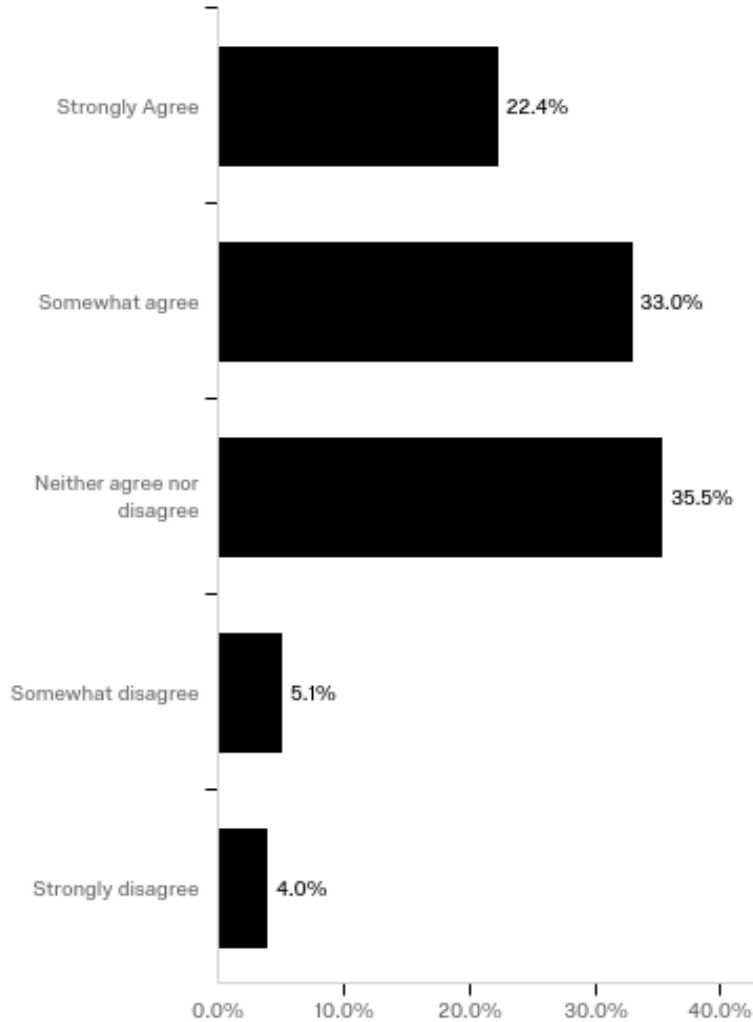
Middle class appears to see it as important to visit a store own by a family

It is important for me to visit a food store that is owned and operated by owners heavily engaged with the community



*Respondents from **British Columbia** appear to value community engagement, slightly more than other respondents*

It is important for me to visit a food store owned by someone I can trust



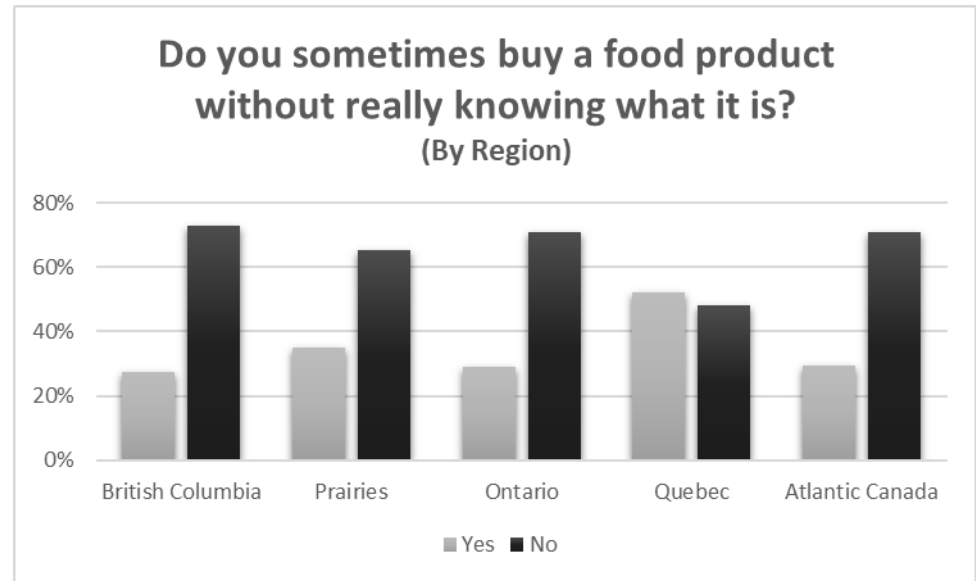
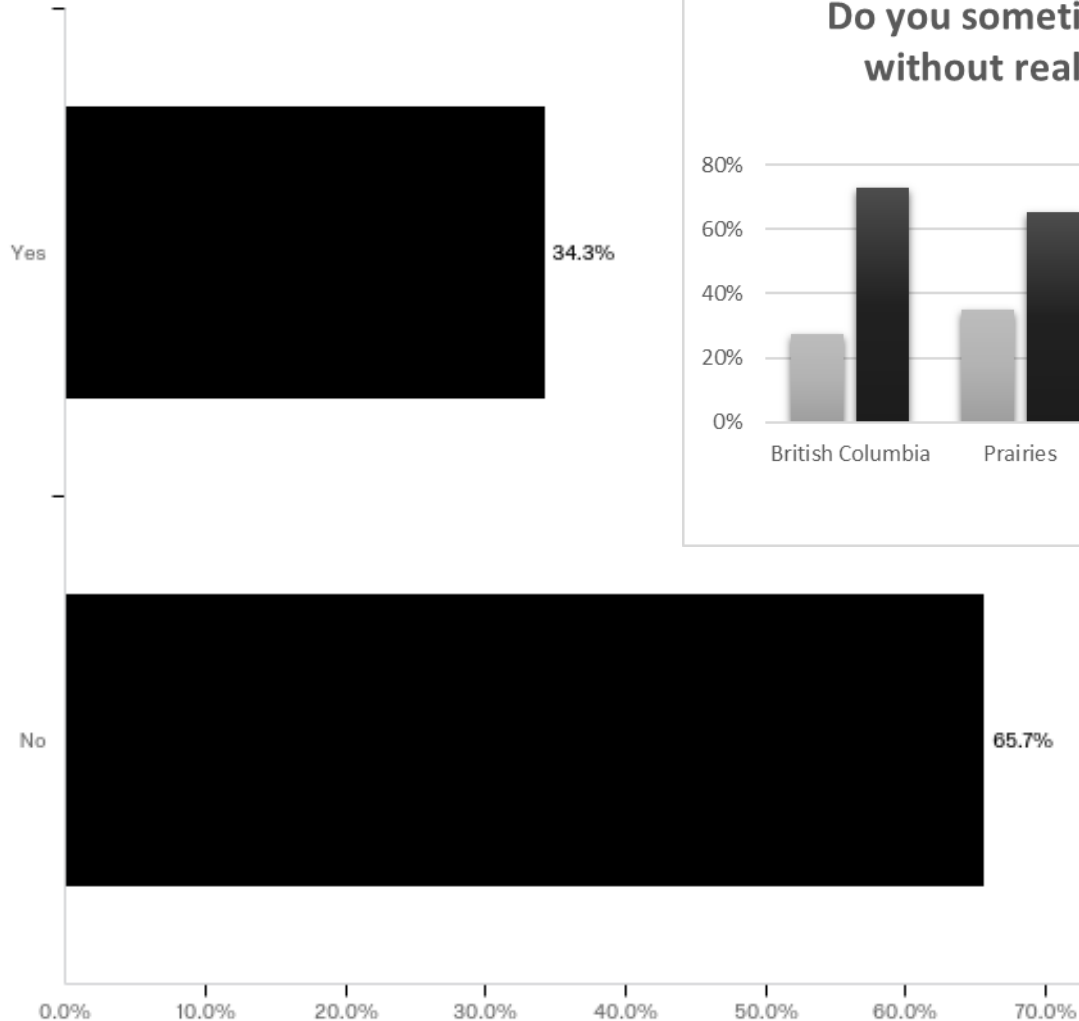
Men appear to value trust in ownership more so than women



Products Specificity

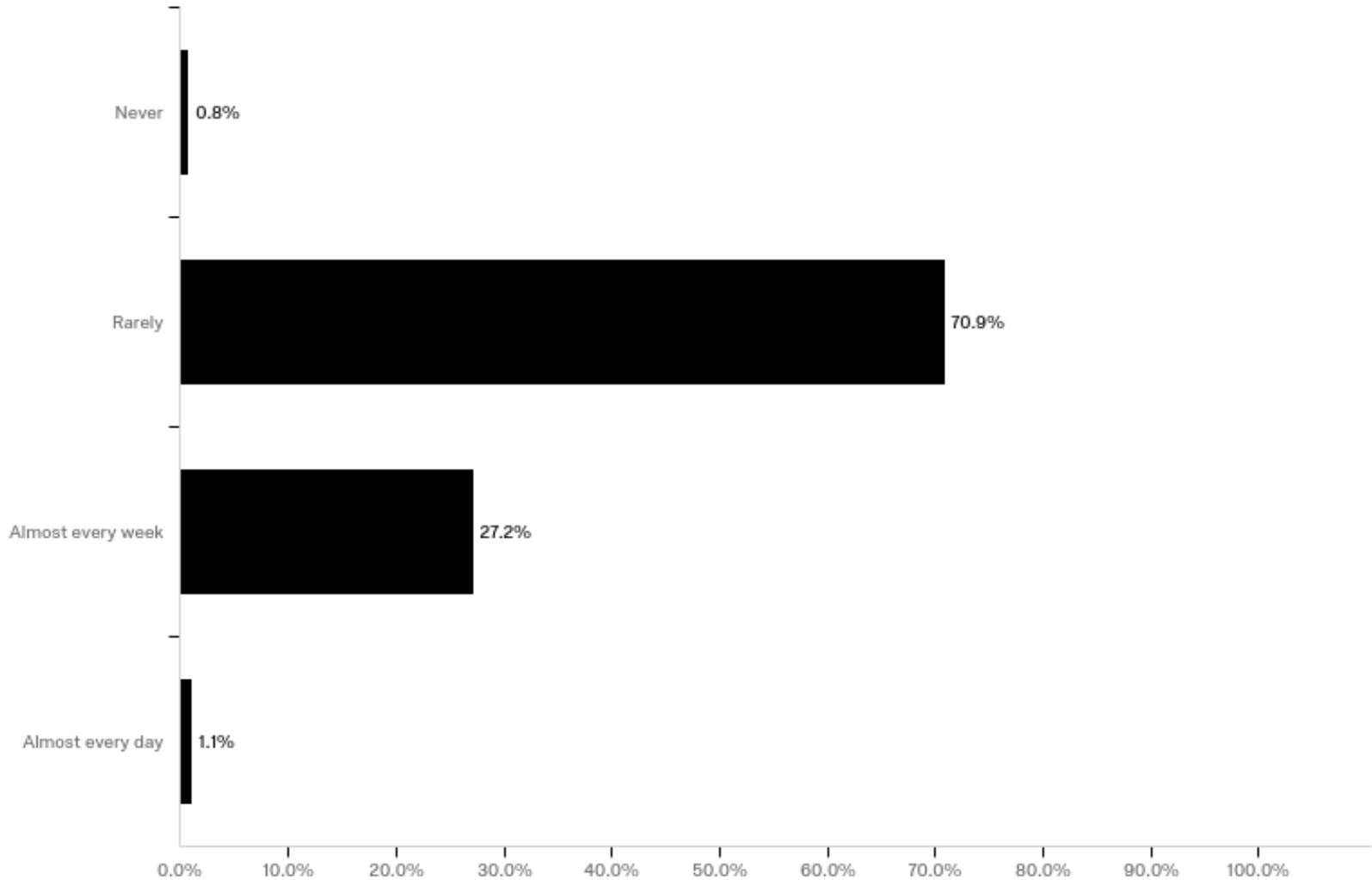
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Do you sometimes buy a food product without really knowing what it is?

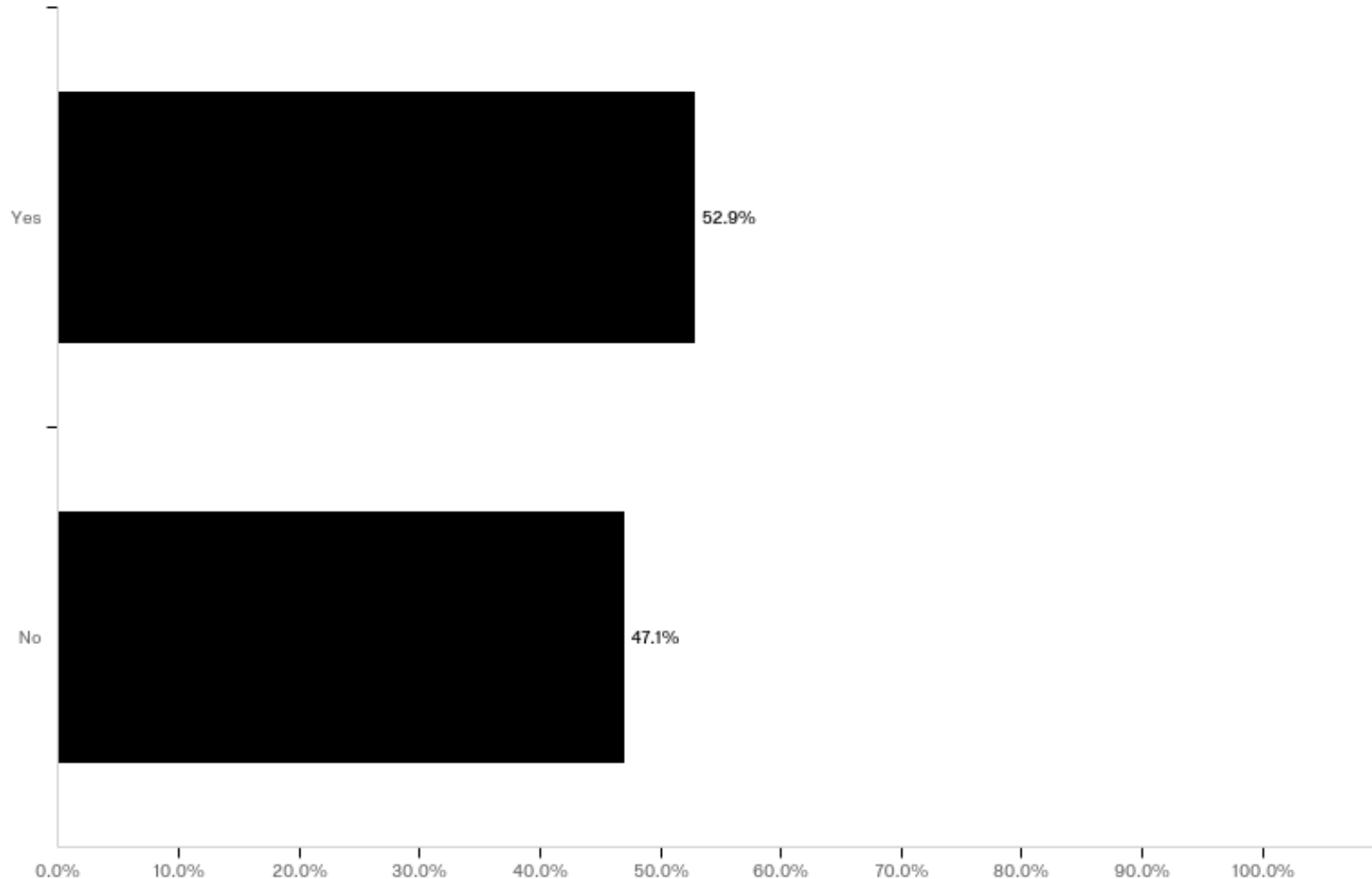


Respondents in Quebec appear to be more curious than respondents in other regions

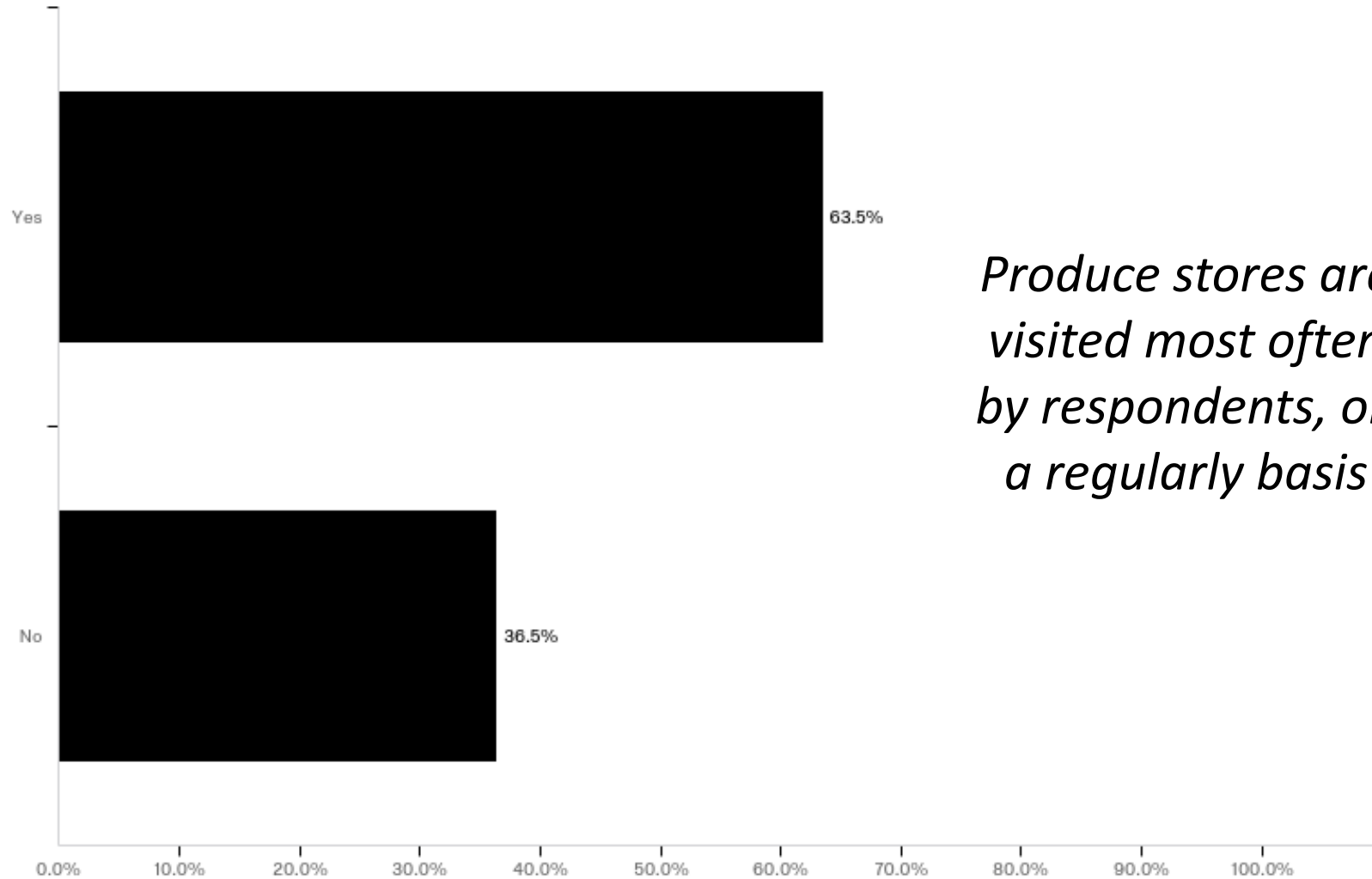
On average how often do you buy ingredients or food products for the very first time?



Do you regularly visit (at least once a month) a store where meat is primarily sold?

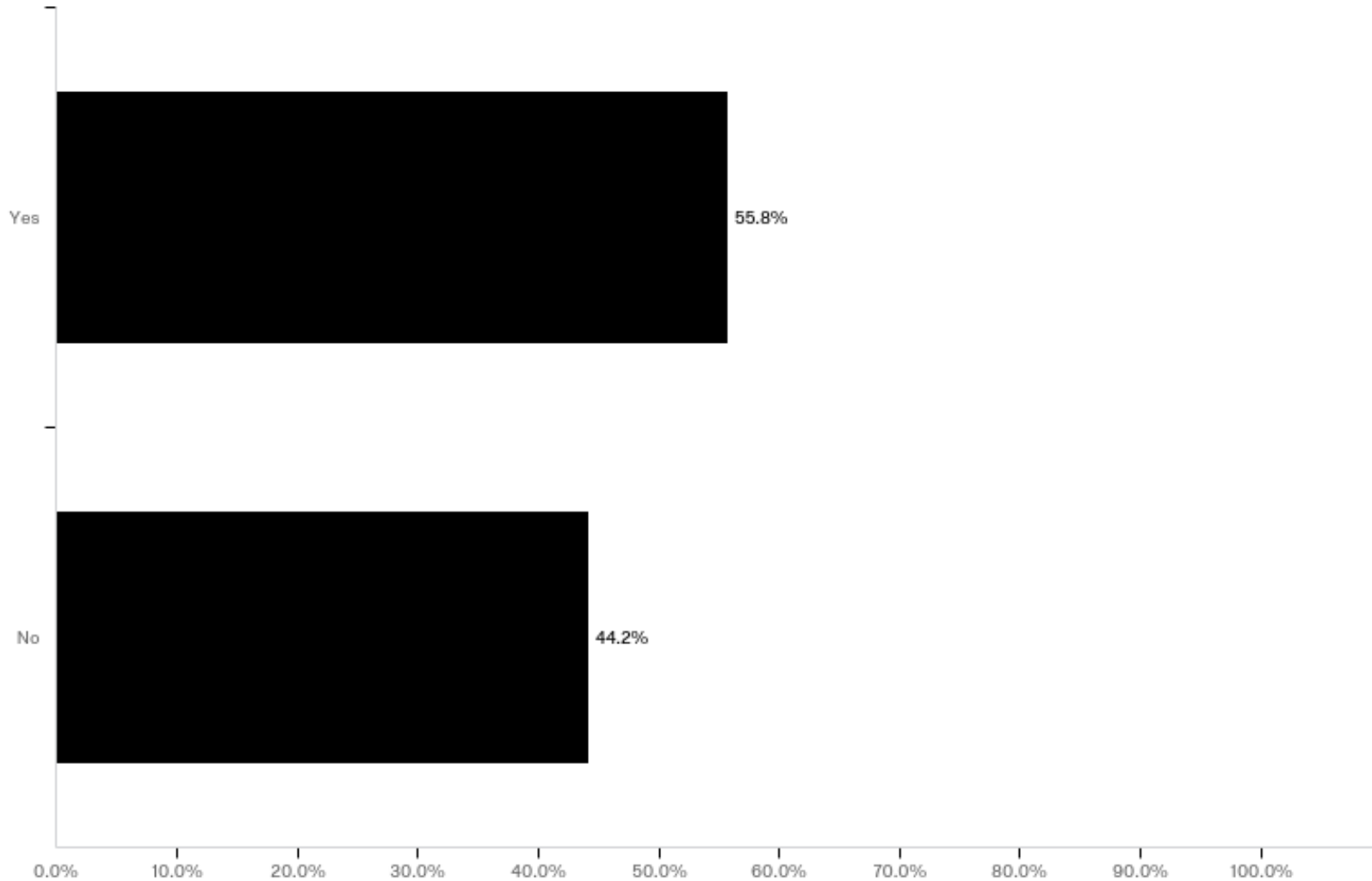


Do you regularly visit (at least once a month) a store where produce is primarily sold?

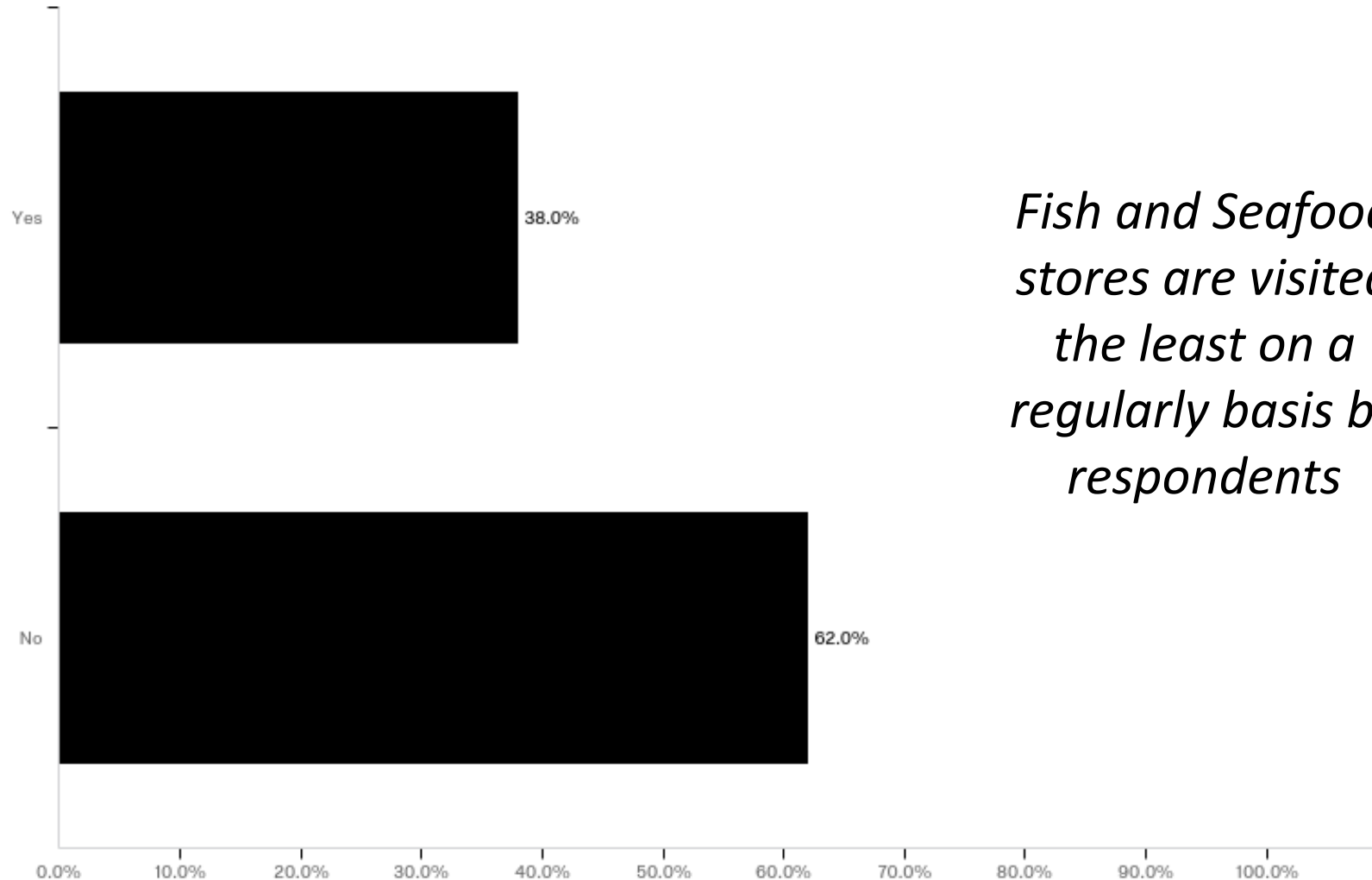


Produce stores are visited most often by respondents, on a regularly basis

Do you regularly visit (at least once a month) a store where bakery products are primarily sold?

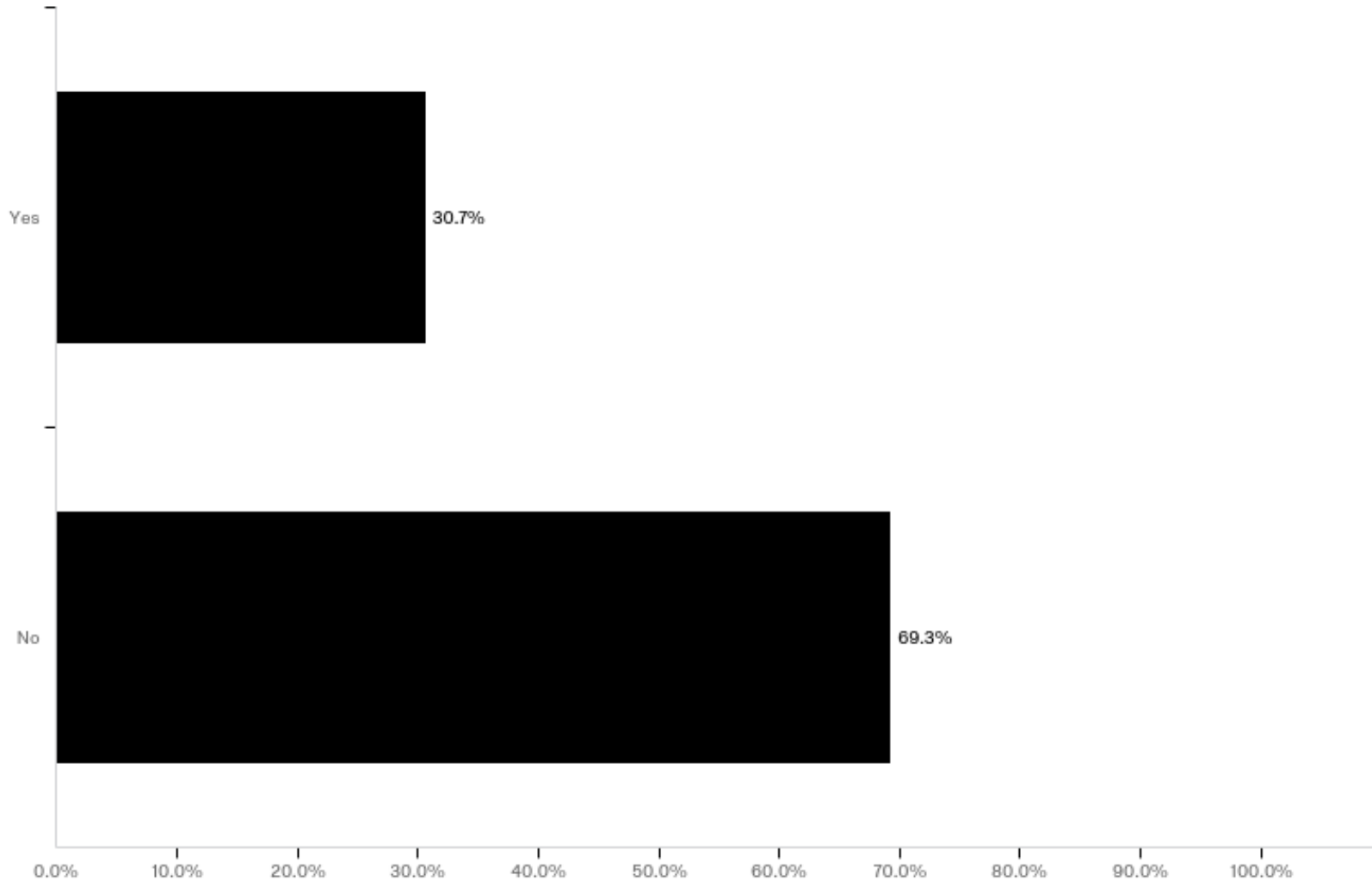


Do you regularly visit (at least once a month) a store where fish and seafood are primarily sold?

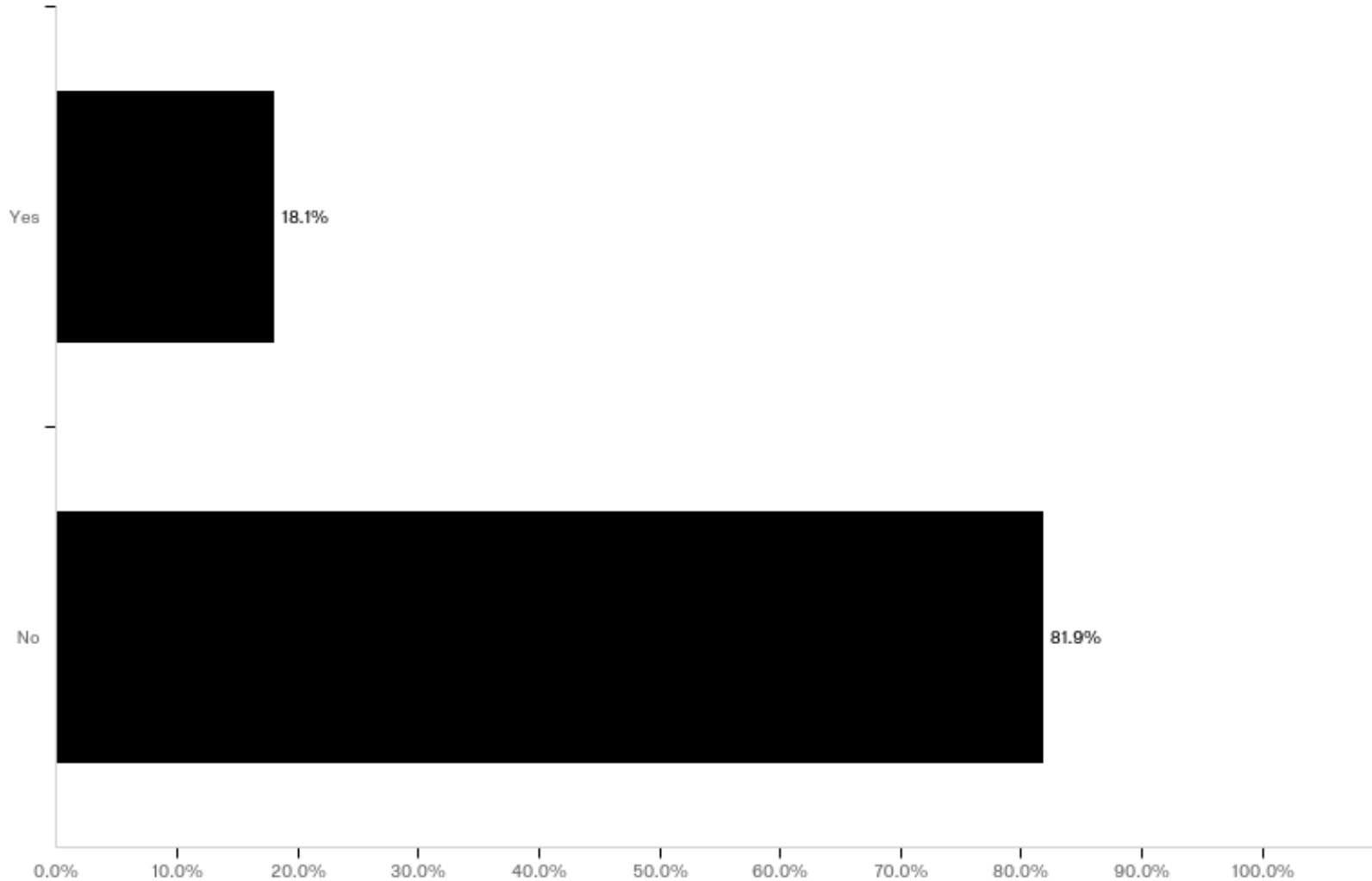


Fish and Seafood stores are visited the least on a regularly basis by respondents

Do you regularly visit (at least once a month) a farmers' market?

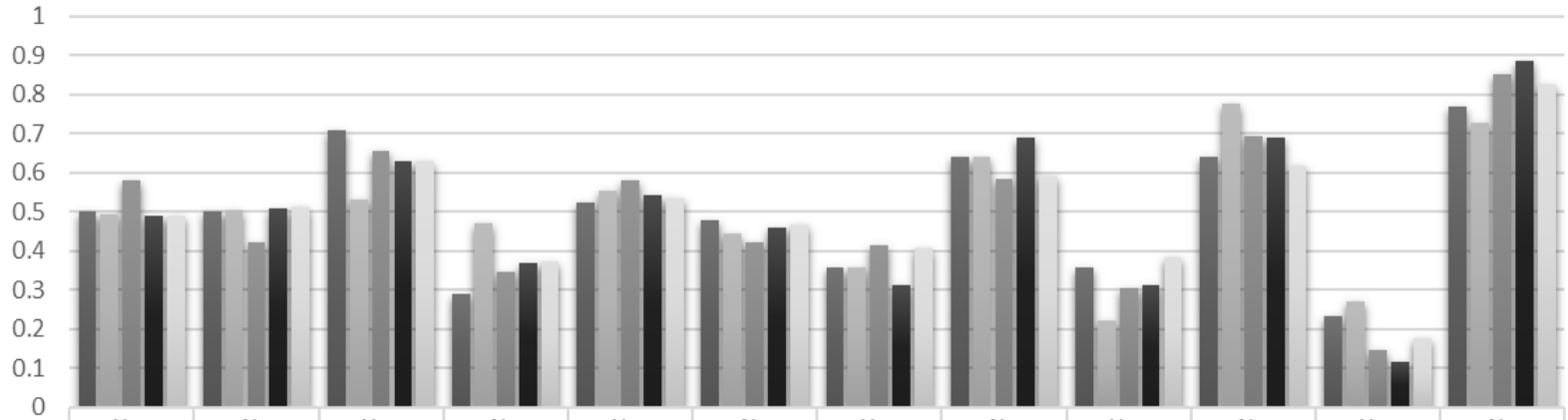


Do you regularly visit (at least once a month) a social enterprise (coop, non-for-profit, etc...) which sells food?



Specialty Stores (By Region)

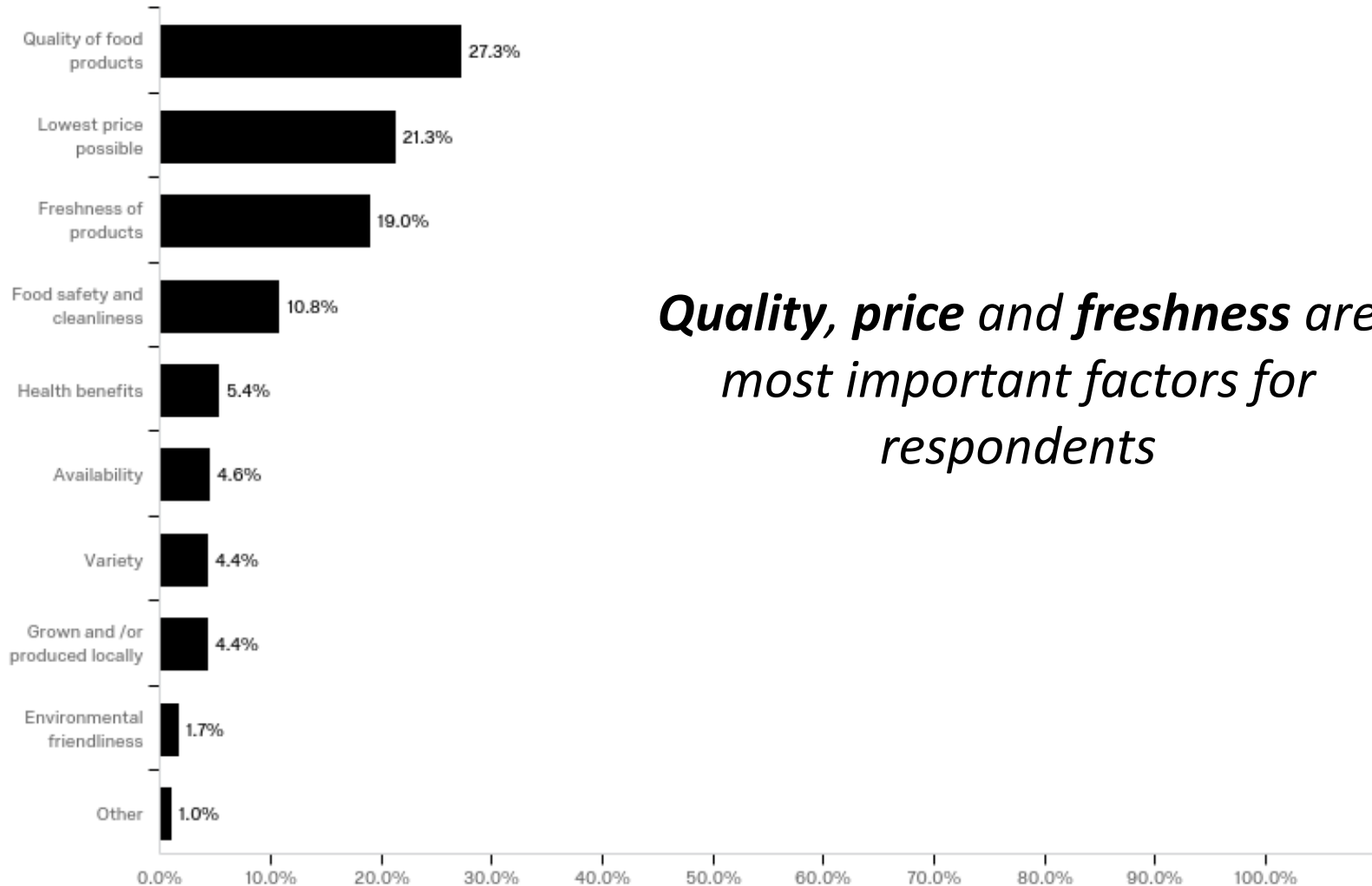
Specialty Stores (By Region)



	Meat		Produce		Bakery		Fish and Seafood		Farmers' market		Social Enterprise (Coop)	
	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
■ British Columbia	50%	50%	71%	29%	52%	48%	36%	64%	36%	64%	23%	77%
■ Prairies	49%	51%	53%	47%	56%	44%	36%	64%	22%	78%	27%	73%
■ Ontario	58%	42%	66%	34%	58%	42%	41%	59%	30%	70%	15%	85%
■ Quebec	49%	51%	63%	37%	54%	46%	31%	69%	31%	69%	11%	89%
■ Atlantic Canada	49%	51%	63%	37%	53%	47%	41%	59%	38%	62%	17%	83%

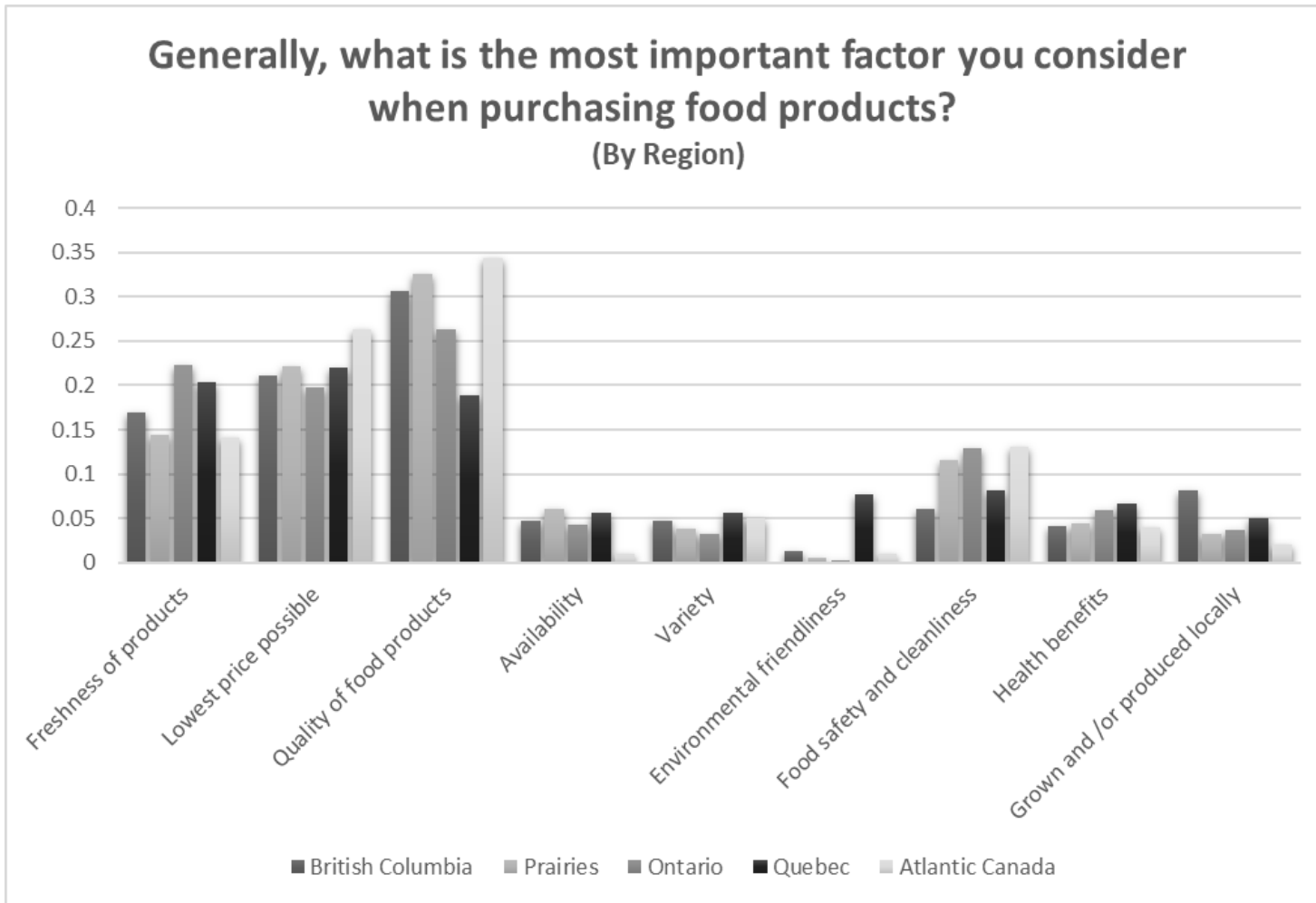
■ British Columbia ■ Prairies ■ Ontario ■ Quebec ■ Atlantic Canada

Generally, what is the most important factor you consider when purchasing food products?



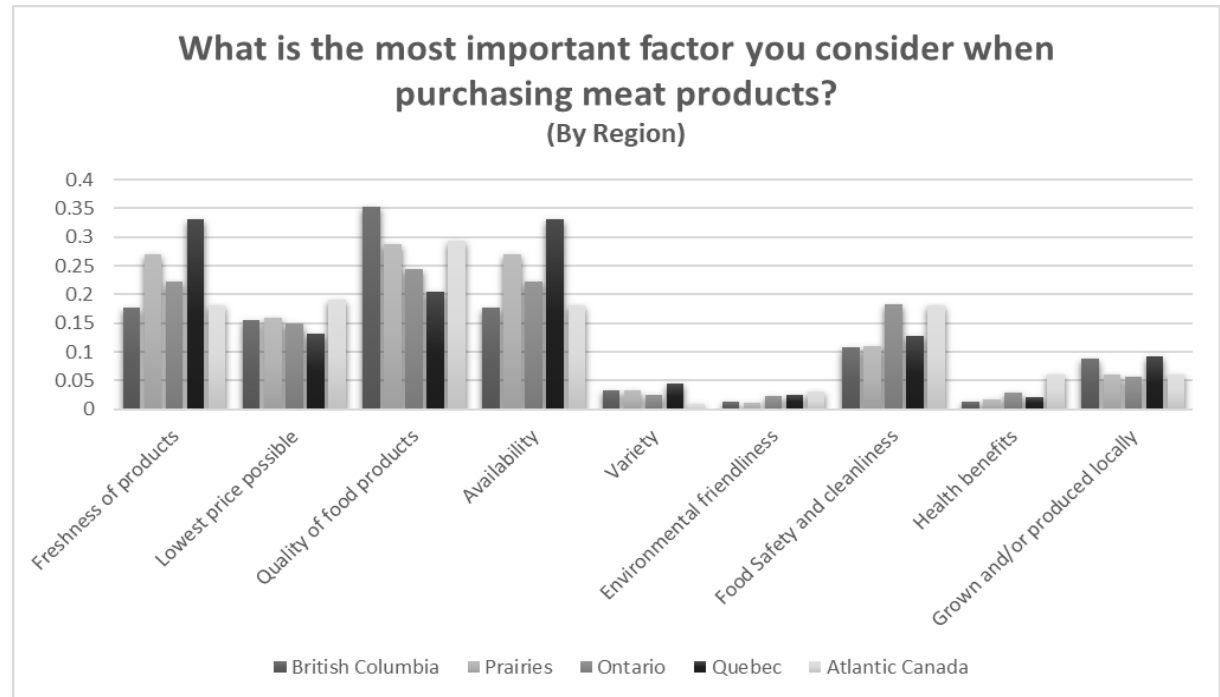
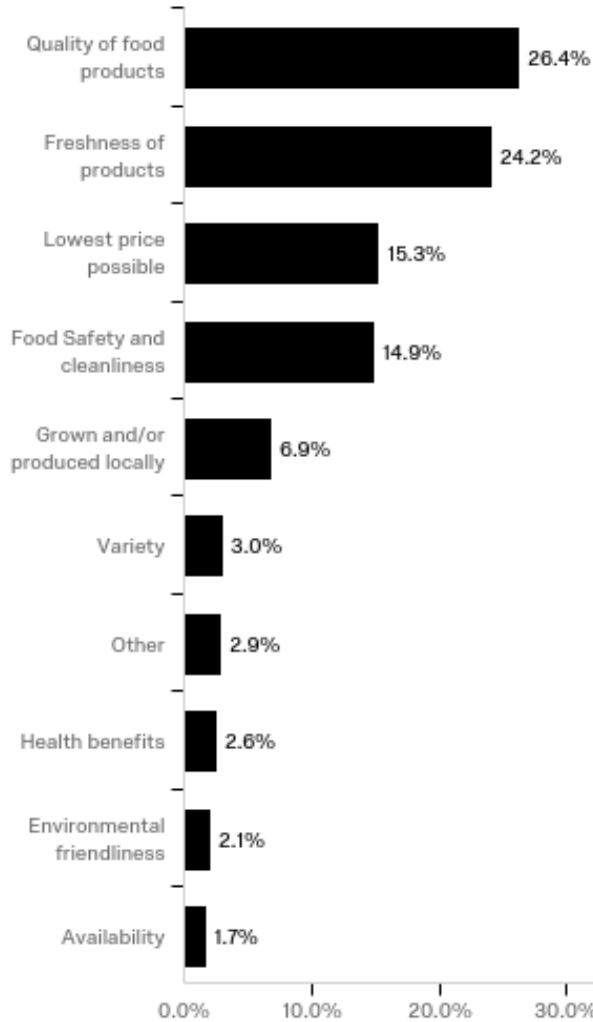
Quality, price and freshness are most important factors for respondents

Generally, what is the most important factor you consider when purchasing food products?



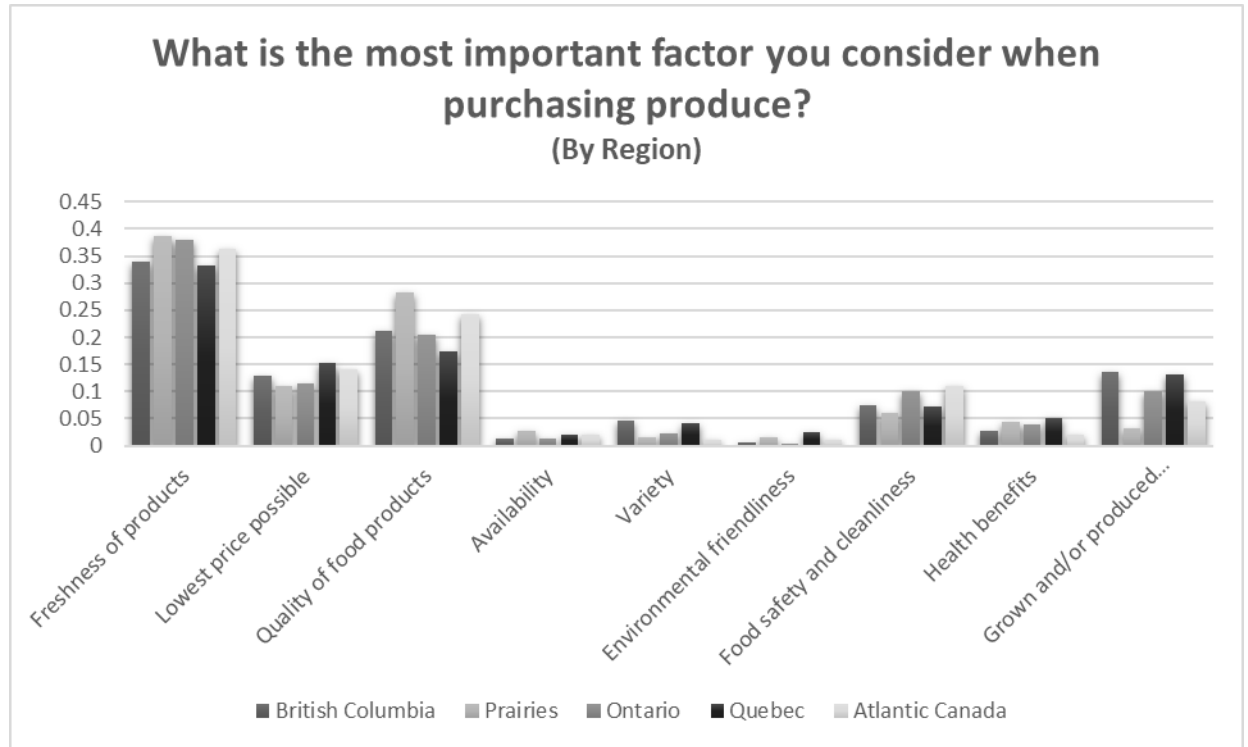
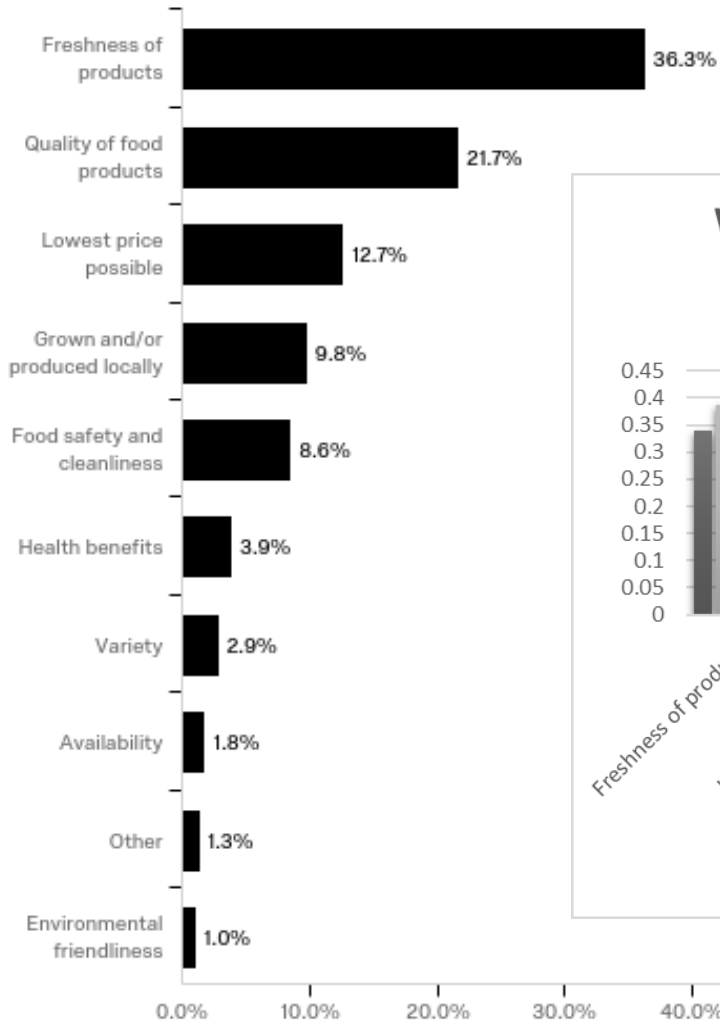
Respondents in Atlantic Region appear to value Price and Quality, while Quebec respondents value environmental friendliness

What is the most important factor you consider when purchasing meat products?

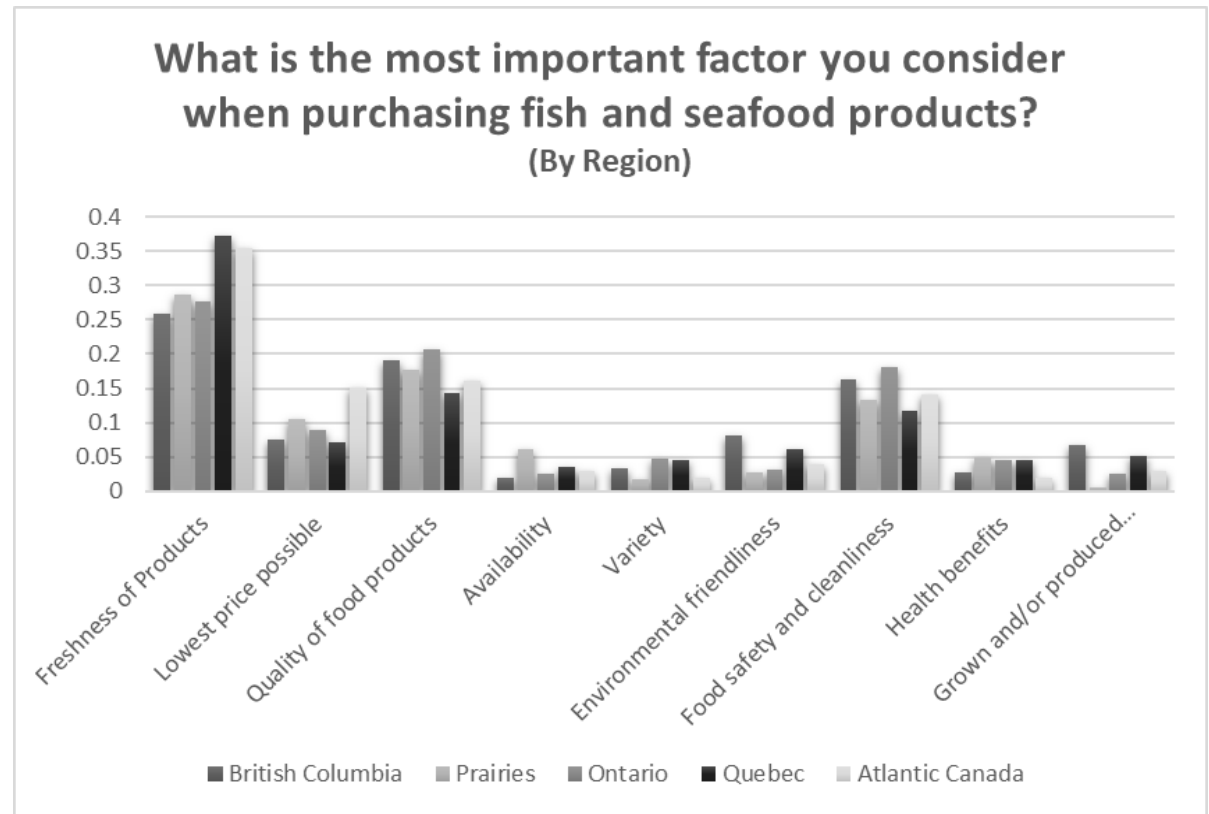
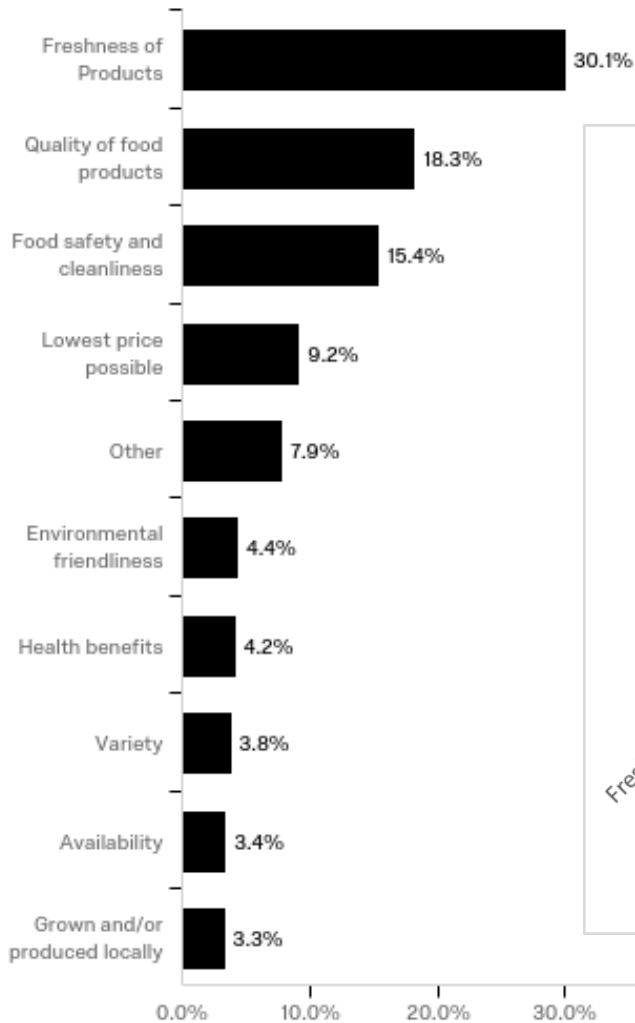


Quebec, most sensitive to meat freshness, Atlantic Region most sensitive to price while British Columbia most sensitive to quality

What is the most important factor you consider when purchasing produce?



What is the most important factor you consider when purchasing fish and seafood products?



Overview of Framework



- **Service specificity**
 - Assistance is key
 - Online potential
 - Self-Checkouts to grow
- **Management specificity**
 - Management does not matter
 - Location important
 - Everything in one location is key
 - Community Engagement and Trust are key
- **Product specificity**
 - Produce, bakery, meat (in order) most popular specialty stores
 - Quality, price and freshness (in order) are most important factors for respondents
 - Environmental friendliness and locally grown important factors in Quebec
 - Curiosity potential driver

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