



Grocery Disruptors

Innovation in the Retail Aisle

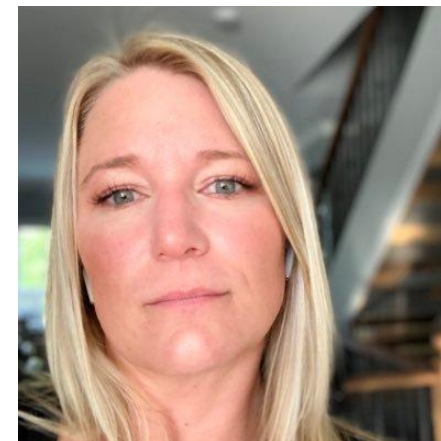


Agri-Food
Analytics Lab

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



Who We Are



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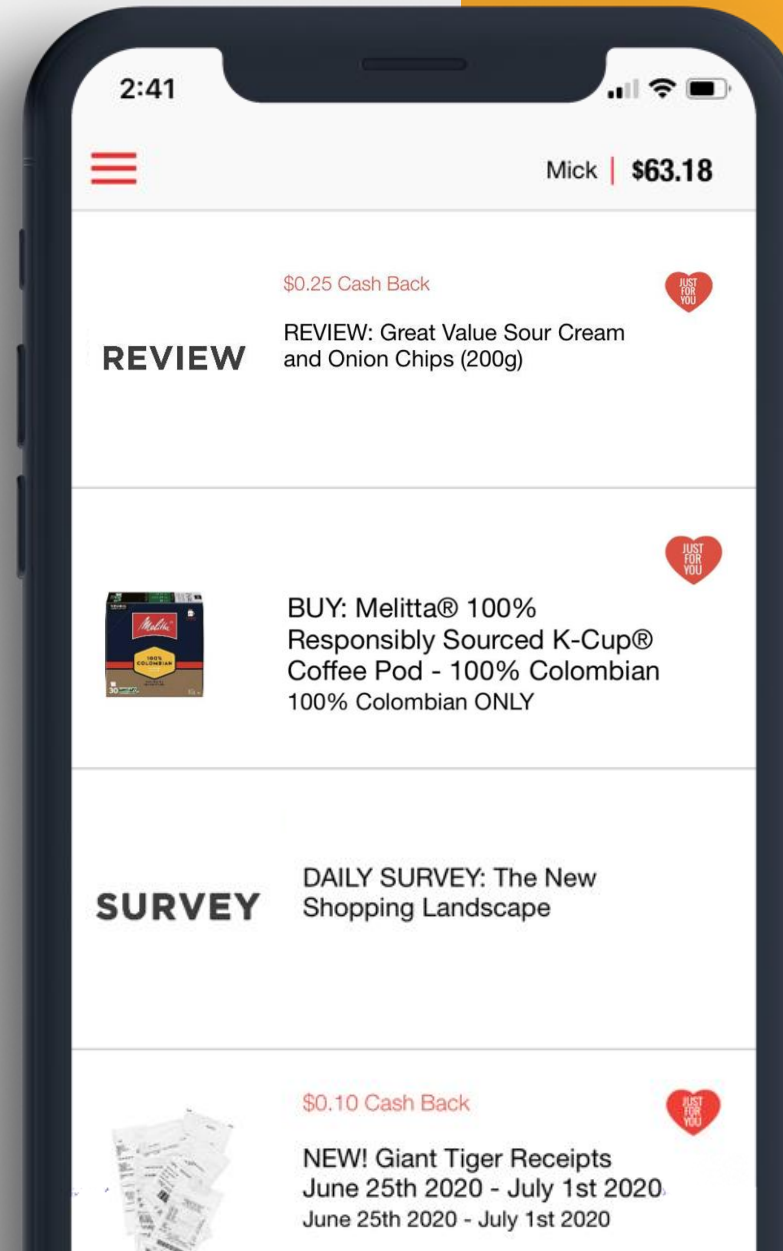


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AskCaddle®

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.



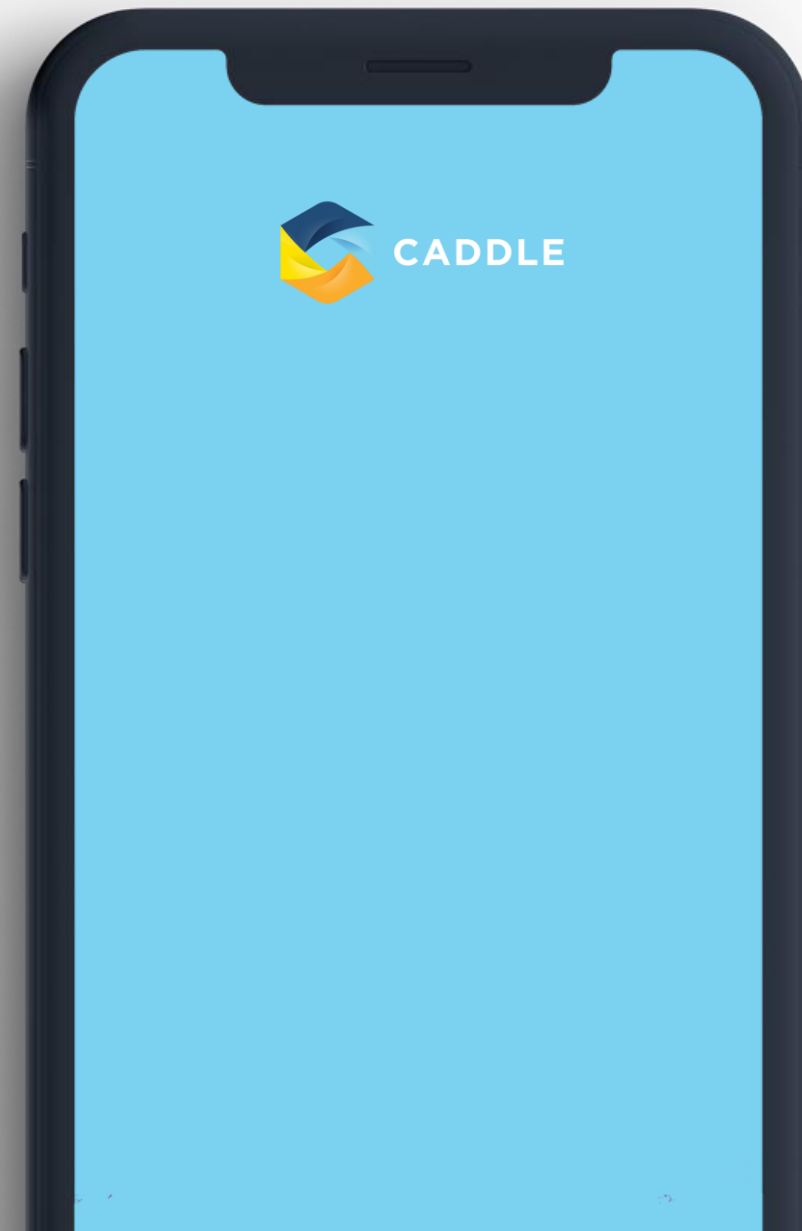
Methodology

A representative survey of Canadians was conducted in April, 2022, in partnership with Dalhousie Agri-Food Analytics Lab.

2 custom studies conducted with over 10,000 Canadians per study.

Additional data presented from studies conducted in September 2021, January 2022, and Caddle's Grocery CX Tracker 2021

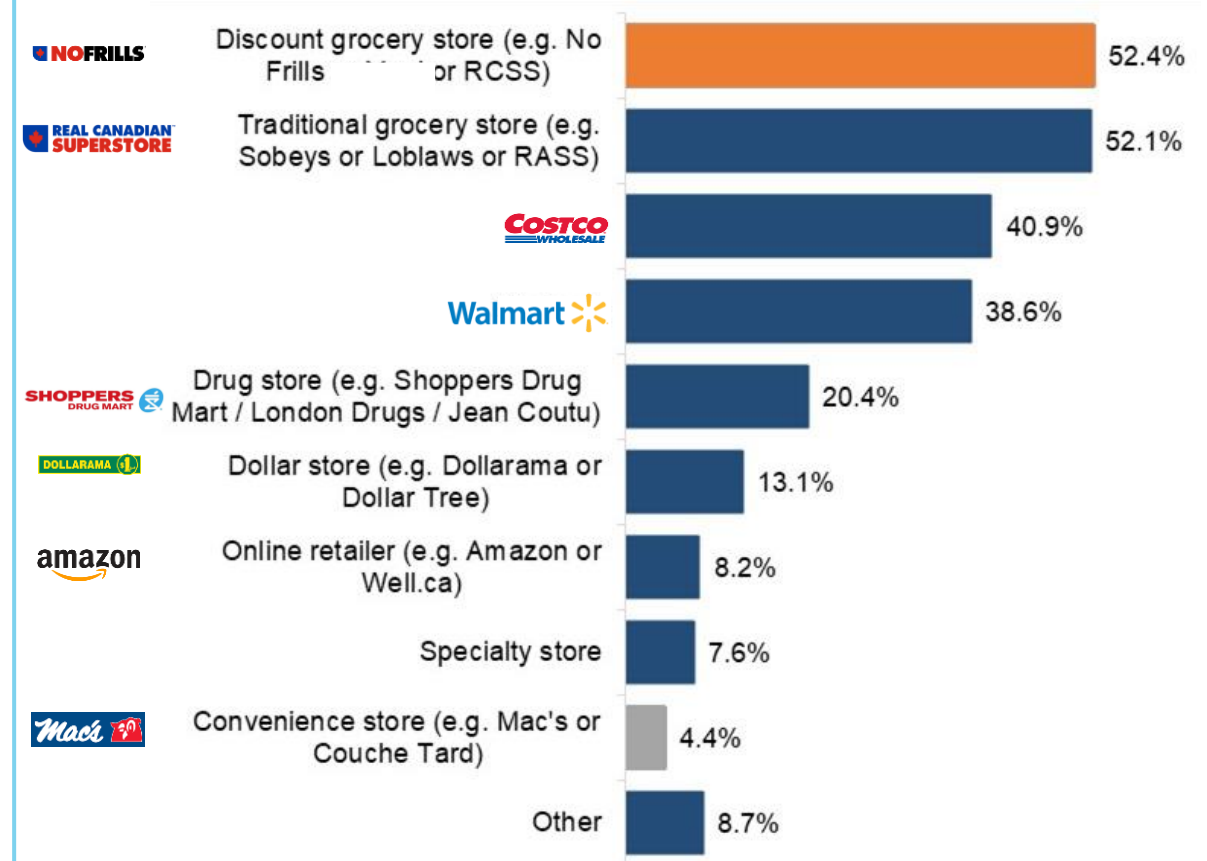
All data presented is owned by Caddle and has a Margin of Error of 1% or lower.



Current State of the Canadian Grocery Shopper

- Nearly 9 out of 10 Canadians (88%) like to get a flyer from their grocery store in one form or another.
- The grocery store app is most preferred (41%) followed by paper version mailed to the house (37%).
- Millennials (52%) prefer app flyer and Boomer's (48%) prefer mail flyers.

Where do you typically shop for groceries? (Select all)



More Canadians are Feeling the Impact of Food Inflation in Canada

Do you think food is more expensive than it was 6 months ago?

*Those who answered 'Yes'

	Baby Boomers (1946-1964)	Gen X (1965-1980)	Millennials (1981-1996)	Gen Z (1997-2005)
Jan 2022	93.5%	91.9%	85.1%	79.0%
vs. Sept 2021 Net Change	+0.4%	+2.8%	+4.7%	+10.2%

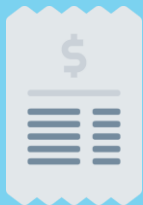
90% of all Canadians believe food prices are higher than 6 months ago,
up 4 basis points from September, 2021 across all generations

Key Insights

In-Store Grocery CX Tracker 2021



Costco has the highest NPS score among all brick-and-mortar retailers at the national level, followed by Giant Tiger and No Frills/Maxi



“Cleanliness and hygiene”, “quick shop & check-out” and “good value for price” are the top NPS drivers for brick-and-mortar retailers



There are some regional differences. Costco has the highest NPS score in Prairies and Quebec
No Frills has the highest NPS score in BC and Atlantic
Giant Tiger has the highest NPS in Ontario

Key Insights

Online Grocery CX Tracker 2021



Amazon has the highest NPS score among all online retailers at the national level, followed by Saveonfoods.com and PCExpress.ca

57%

of the consumers choose “home delivery” and 43% choose “click and collect” when shopping online

52%

of the consumers indicate that they are very/somewhat likely to use a different retailer next time they shop for groceries online



“User-friendly app/site”, “payment options” and “cleanliness and hygiene” are the top NPS drivers for online retailers

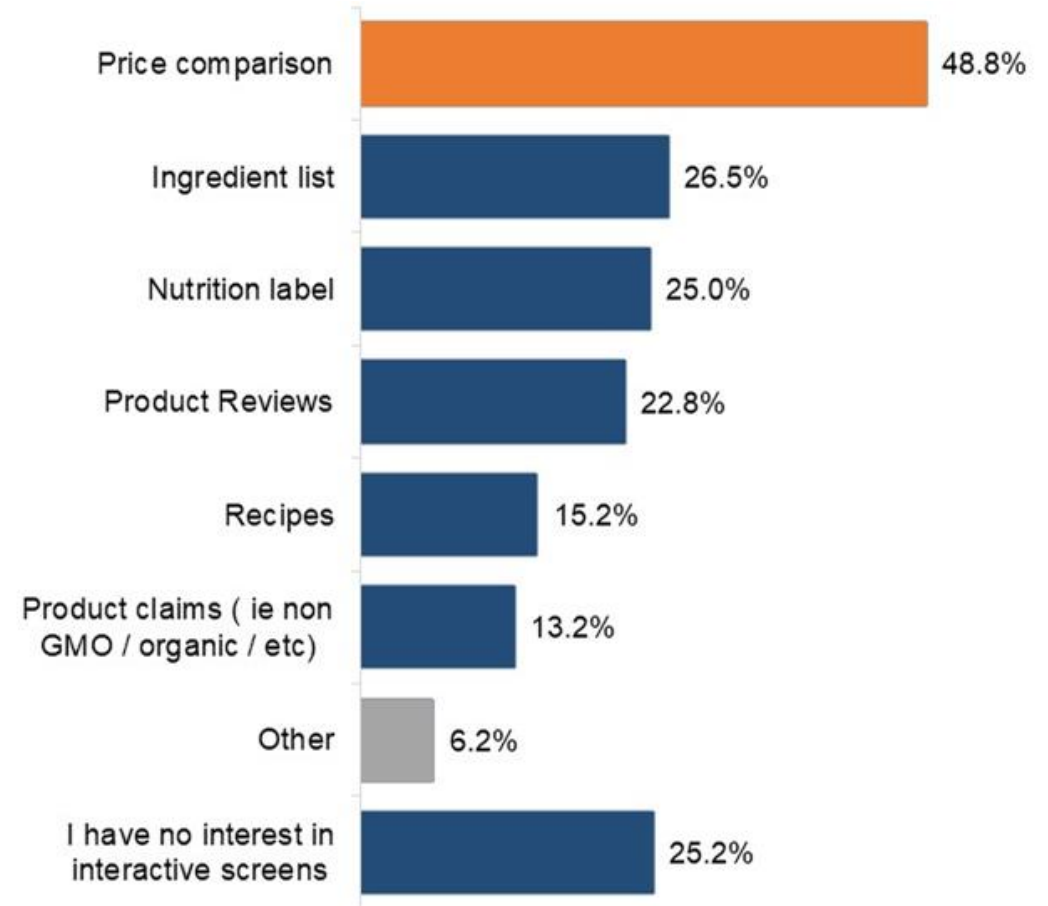
What's Next for the Canadian Consumer?



Shopping Innovation in the Aisle

- Nearly 3 out of 4 Canadians have an interest in interactive screens.
- The ability to see price comparisons is the most desired feature by nearly half of Canadians.
- Price comparison is top of the list for Boomers (55%), Gen X (51%), and Millennials (53%) whereas for Gen Z it is only 35%.
- Gen Z's are most interested in Ingredients (38%).

If interactive screens were available at your local grocery store, what would you like to see on the screen? (Select all)



Have digital price tags been adopted?

Millennials are the most likely to have noticed them with 31% saying “Yes” as well as residents of Quebec at 29%

21.5%

Of Canadians have noticed digital price tags at their local grocery store in the past 6 months.

Credit card tap tops the list of ways Canadians pay at the grocery store

Baby Boomers are most likely to still use cash

59.2%

Of Canadians use credit card tap-to-pay at grocery stores

Payment Innovation at Retail

Self-Checkout is Here to Stay, while Checkoutless Shopping Remains Murky

75%

Of Canadians have used self-checkout for their main grocery shop in the last 6 months

85.1%

Of Canadians who use self-checkout are satisfied with the experience

47%

Of Canadians are likely to use checkoutless shopping if offered

34% of Canadians are unsure about checkoutless shopping, with older generations less likely to adopt the service

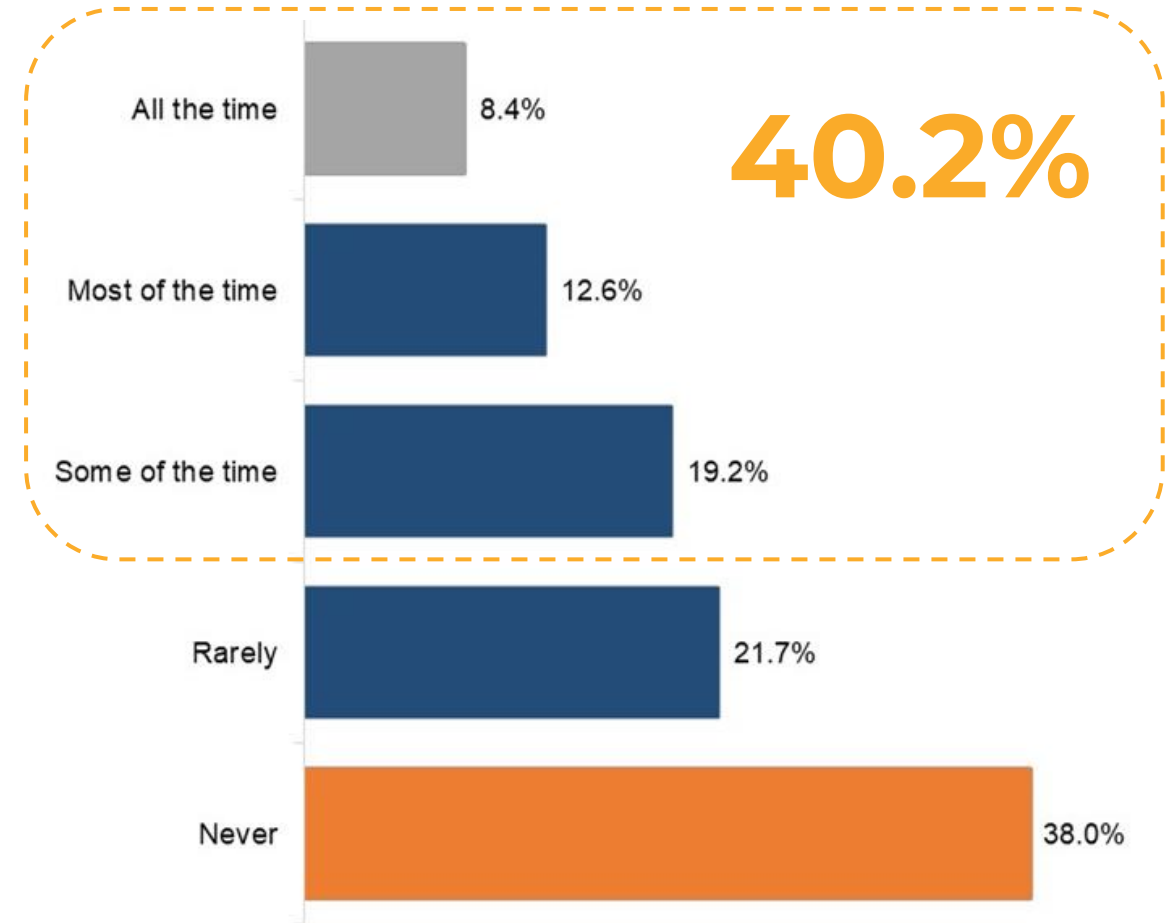
Source: Caddle Custom Survey | April, 2022 | n = 10,544

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The Last Mile innovation

- 40.2% of Canadians are interested in drone / robot delivery
- Gen Z's have the most interest with 36% saying 'all' or 'most of the time' whereas 78% of Boomers say 'Rarely or Never'

If drone / robot delivery were widely available, how often would you use it?



Free 2021 CX Report Valued at \$15,000

Canadian shoppers' Customer Experience ratings with their most recent trip to one of the top national retailers.



Contact Colleen.Martin@caddle.ca for details

Ratings & Reviews, Custom & Syndicated Research