PATH FORWARD WEBINAR HOST

Steve Levy
Ipsos Canada

- Launched career in sales & brand management
- Since the late 80s involved in the marketing research and information business
- Very involved with the Marketing community via CMA/ACA/CMDC
- Frequent public speaker, conference moderator & facilitator
- Currently craving a juicy burger & fresh fries from Holy Chucks.

TODAY'S SPEAKER

Naumi Haque
Ipsos Canada

- 18 years in research and advisory across numerous industries
- Four years at a think tank literally trying to predict the future
- Two years at Google leading insights for the retail sector
- Shopper lead for Ipsos in Canada
- Living my "best Covid life," cooking, gardening, building, playing with three boys.

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THE PATH FORWARD

Understanding Emerging Consumer Behaviour

Naumi Haque, Ipsos Canada

23 June 2020

GAME CHANGERS

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WHAT'S GOING TO STICK?

SPECIFICALLY, WE'RE GOING TO BE TALKING ABOUT NEW, EMERGING, AND FUTURE SHOPPING BEHAVIOURS

Re-engagement in certain categories

In-store behaviours

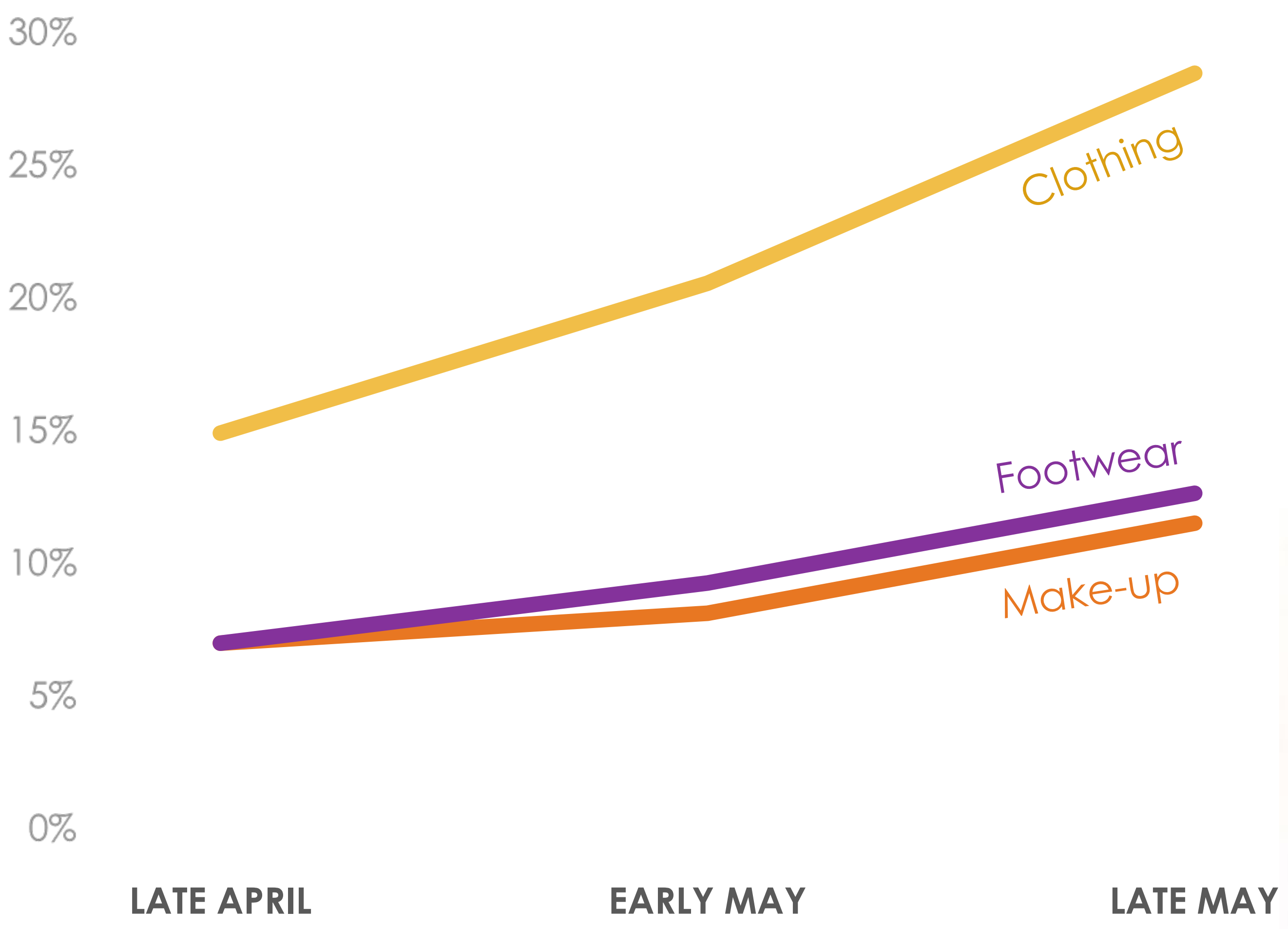
Shopping online

Safety measures taken

Changes in routine

TO HELP BRANDS AND RETAILERS MAKE PLANS FOR TODAY…

Category purchasers (past two weeks)



SOURCE: Context Trends – Knowledge Zones: Coronavirus Canada Tracking, n=1000 each month

… AND TO PLAN FOR THE 2ND HALF OF THE YEAR AND BEYOND

43% of consumers think it will be next winter or later before they resume normal, pre-Covid activities

66% said they would be comfortable visiting a mall within 3 months from easing of social distancing rules

REGARDLESS OF WHICH BEHAVIOURS PREVAIL, HOLIDAY SHOPPING IN 2020 WILL BE MORE OMNI-CHANNEL THAN EVER

49% of shoppers purchased a new brand

77% have said that when they do go to stores, they are spending less time browsing because they want to get in and out quickly

35% of shoppers say they feel shopping online has been a good replacement for shopping they used to do in-store

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ANY PAINS IN YOUR OPERATIONS AND FULFILLMENT TODAY WILL BE AMPLIFIED TOMORROW

1 in 5

shoppers had an issue with their online order

TODAY'S QUESTIONS

- Are shoppers likely to carry out the behaviours that our company cares about?
- What is preventing this behaviour from happening more?
- What are the levers we can pull to try to further encourage these behaviours to continue?

WHAT DRIVES BEHAVIOUR?

36
activities

30
attitudes
about each activity

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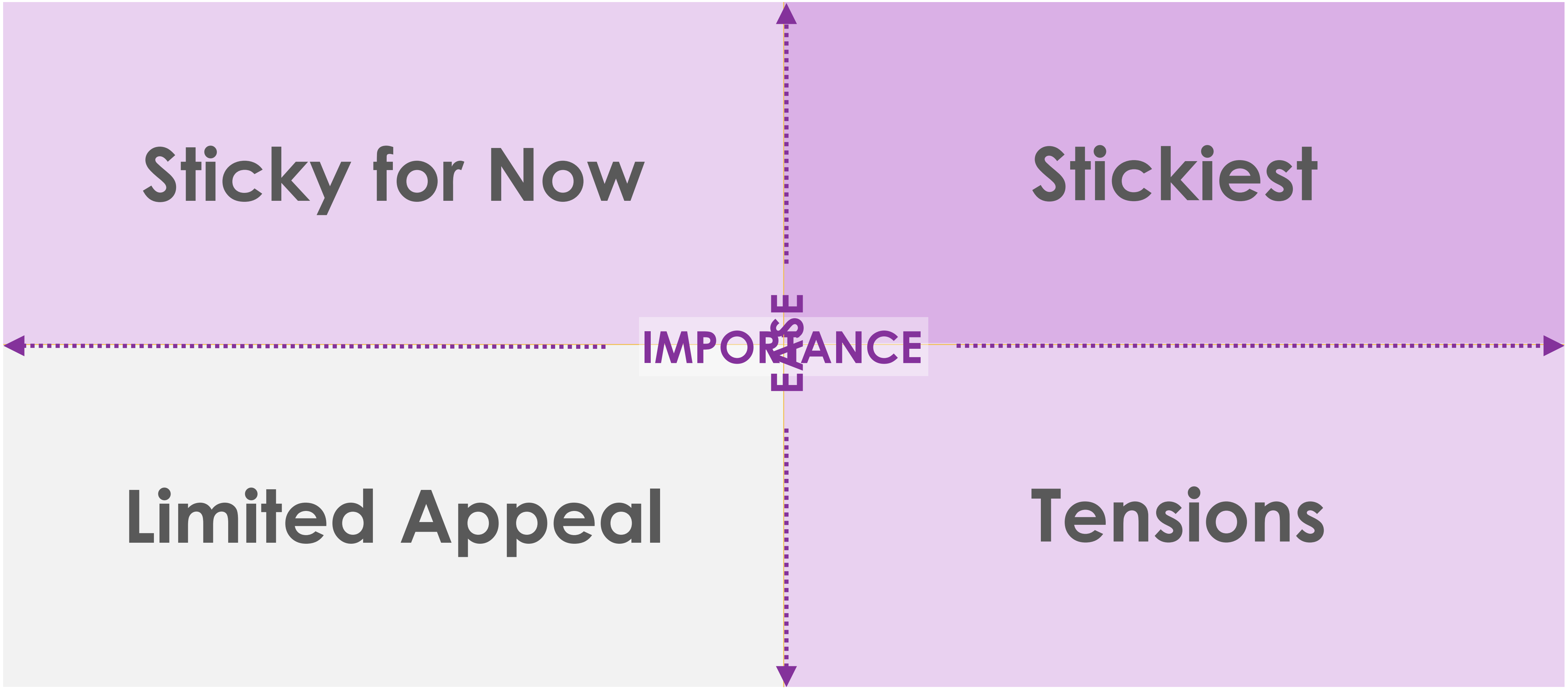
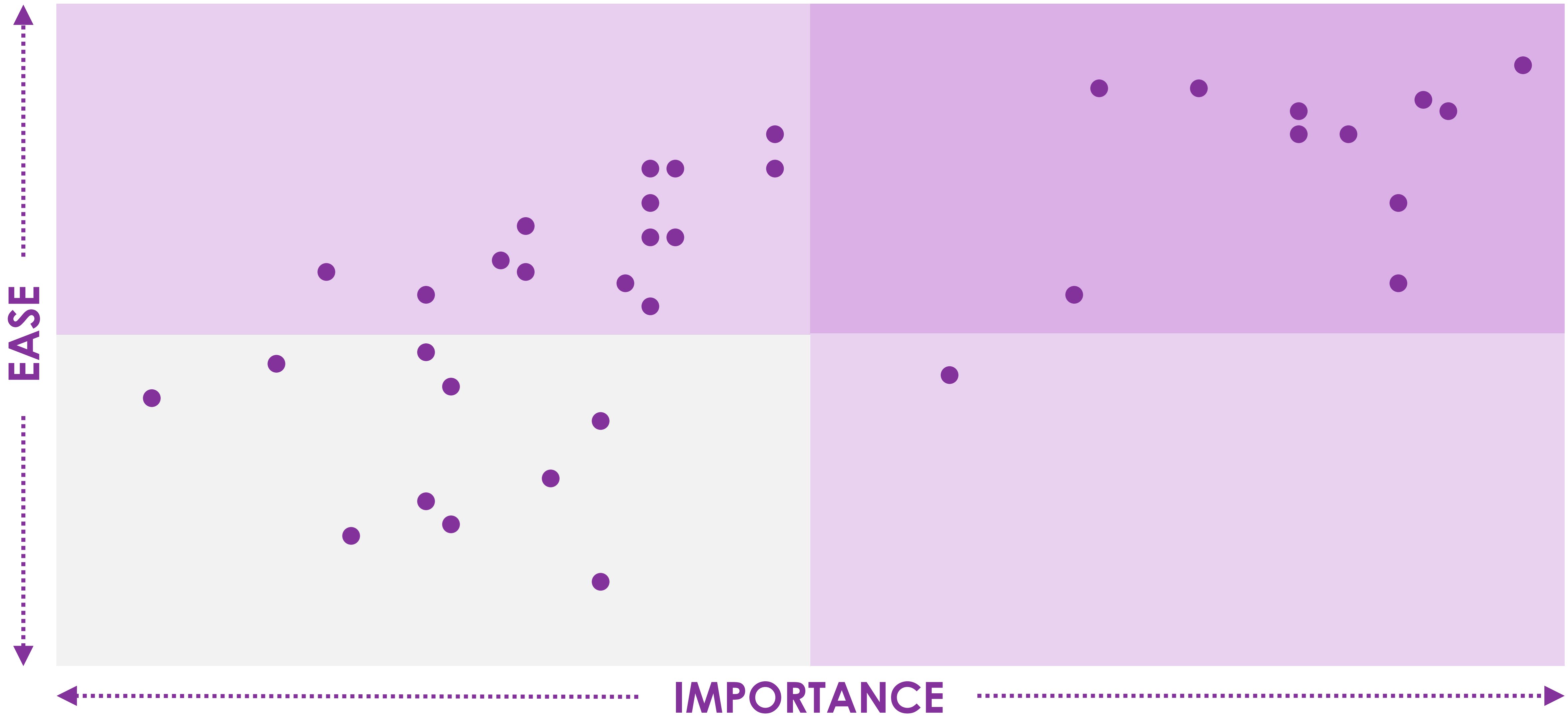
DRIVERS OF BEHAVIOUR ARE CONSISTENT ACROSS CATEGORIES

Likelihood to do something = Ease of doing it x Importance of the activity

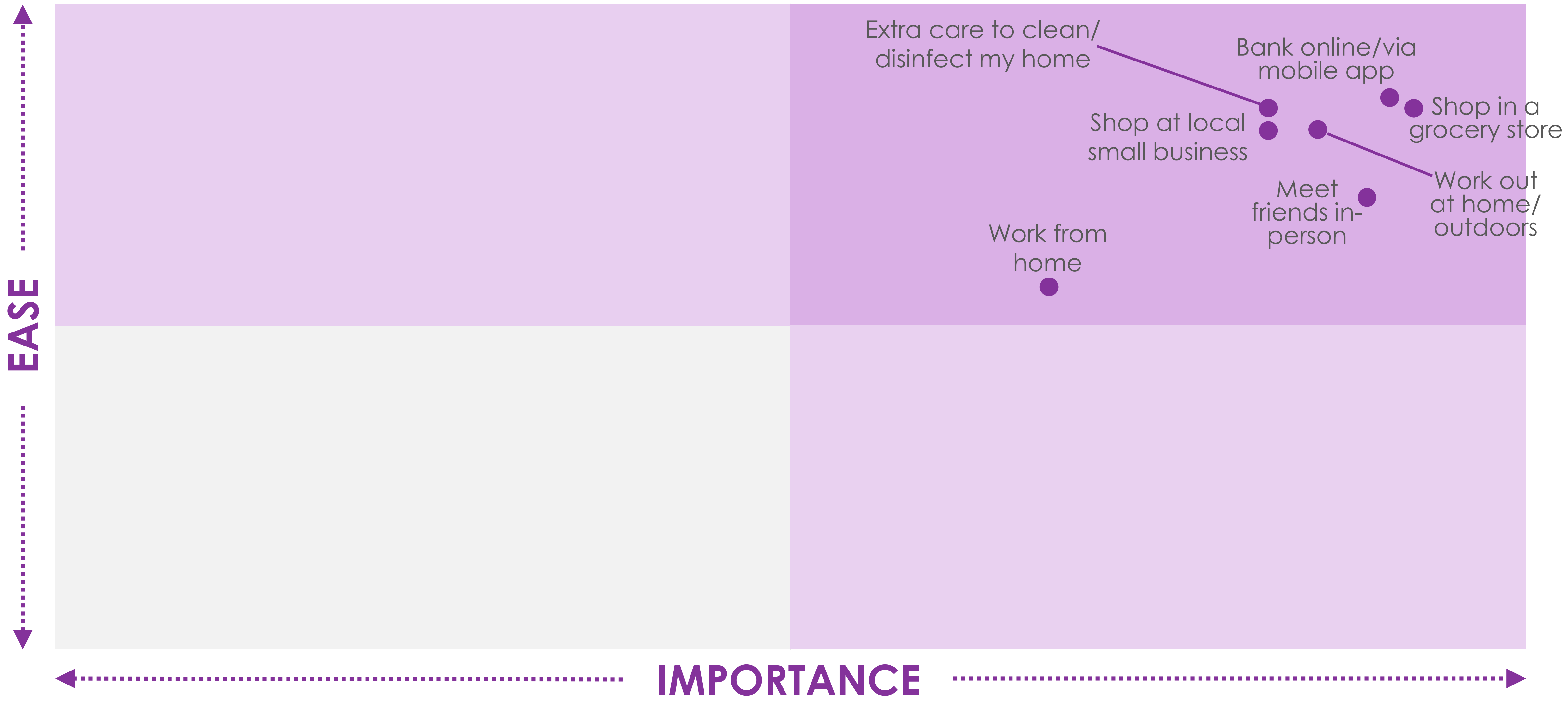
BEHAVIOURAL STICKINESS – NEXT 12-18 MONTHS



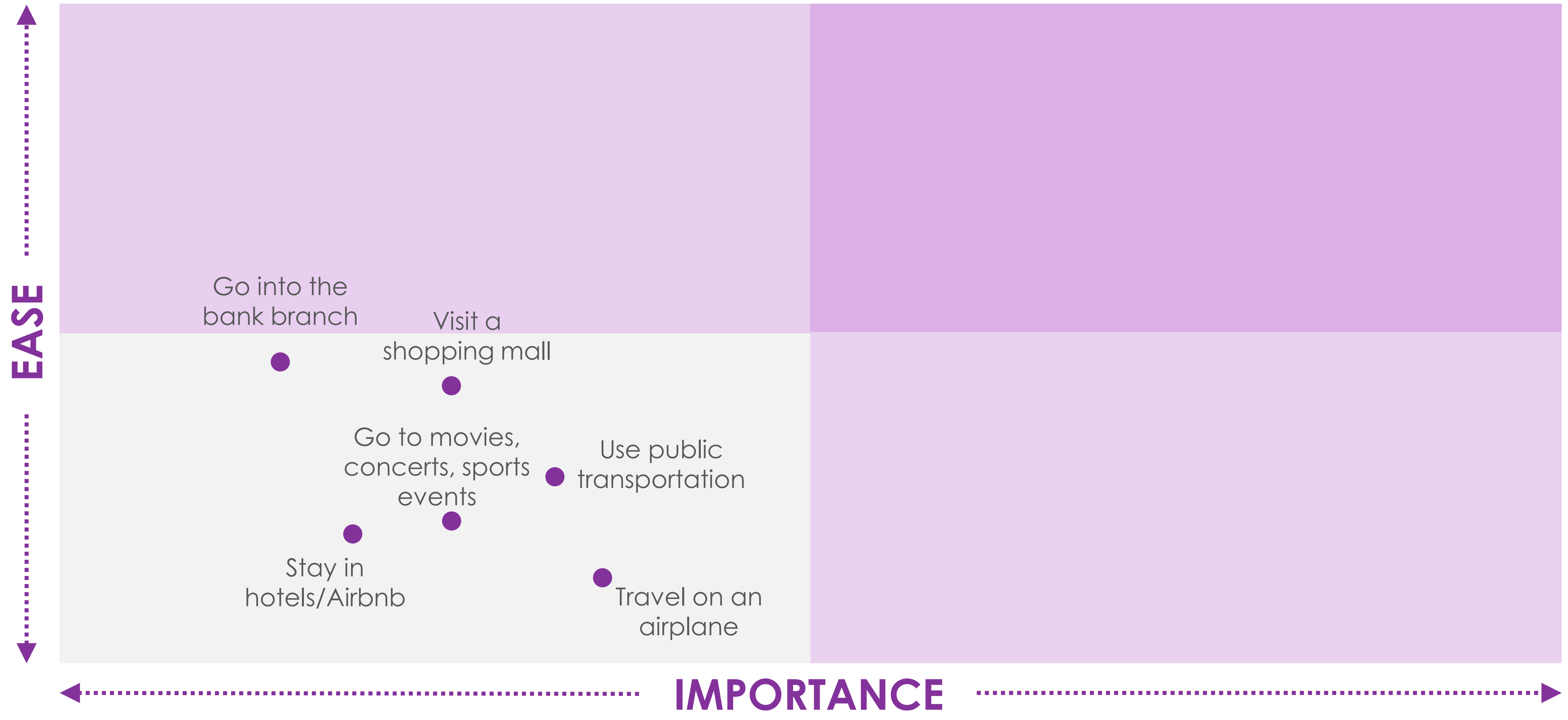
PLOTTING ALL 36 ACTIVITIES



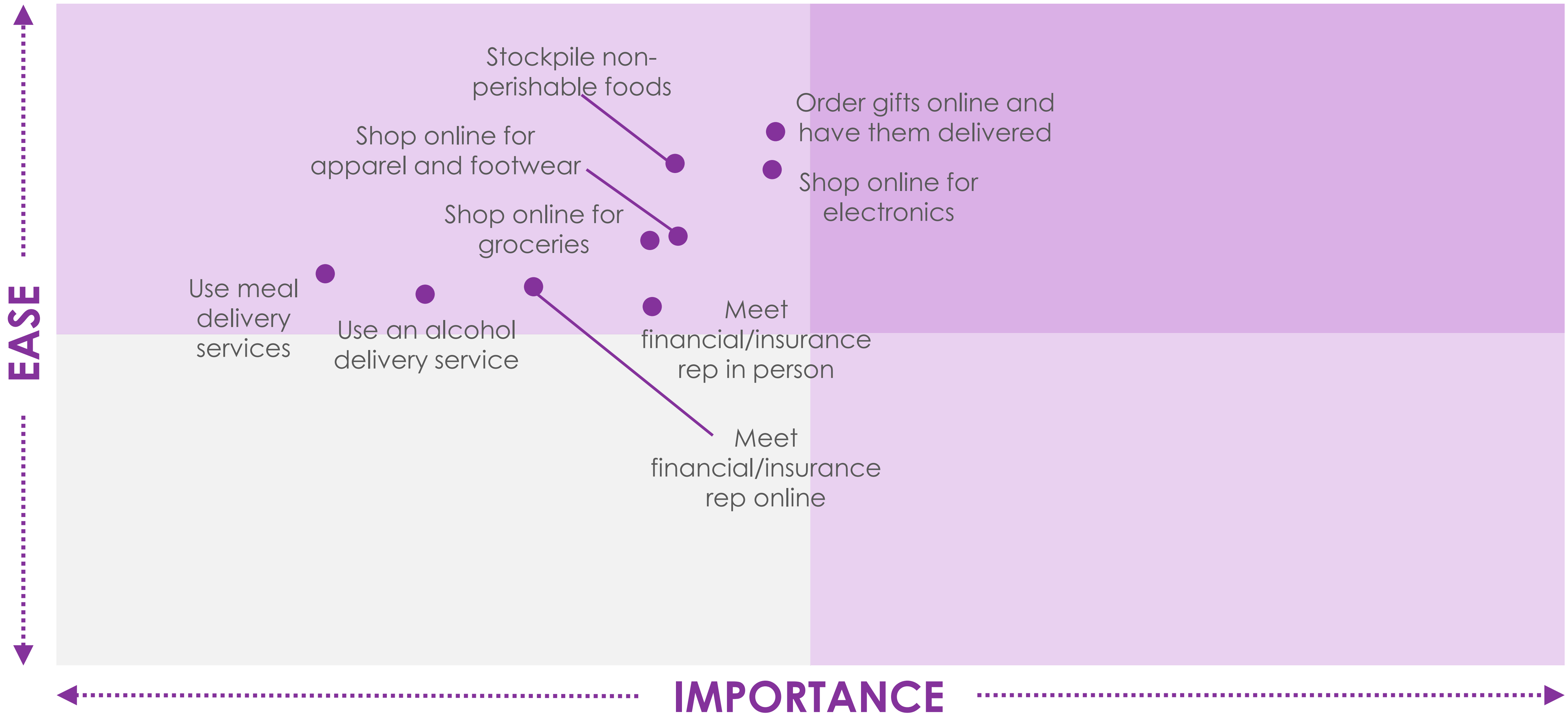
HIGHLY STICKY ACTIVITIES



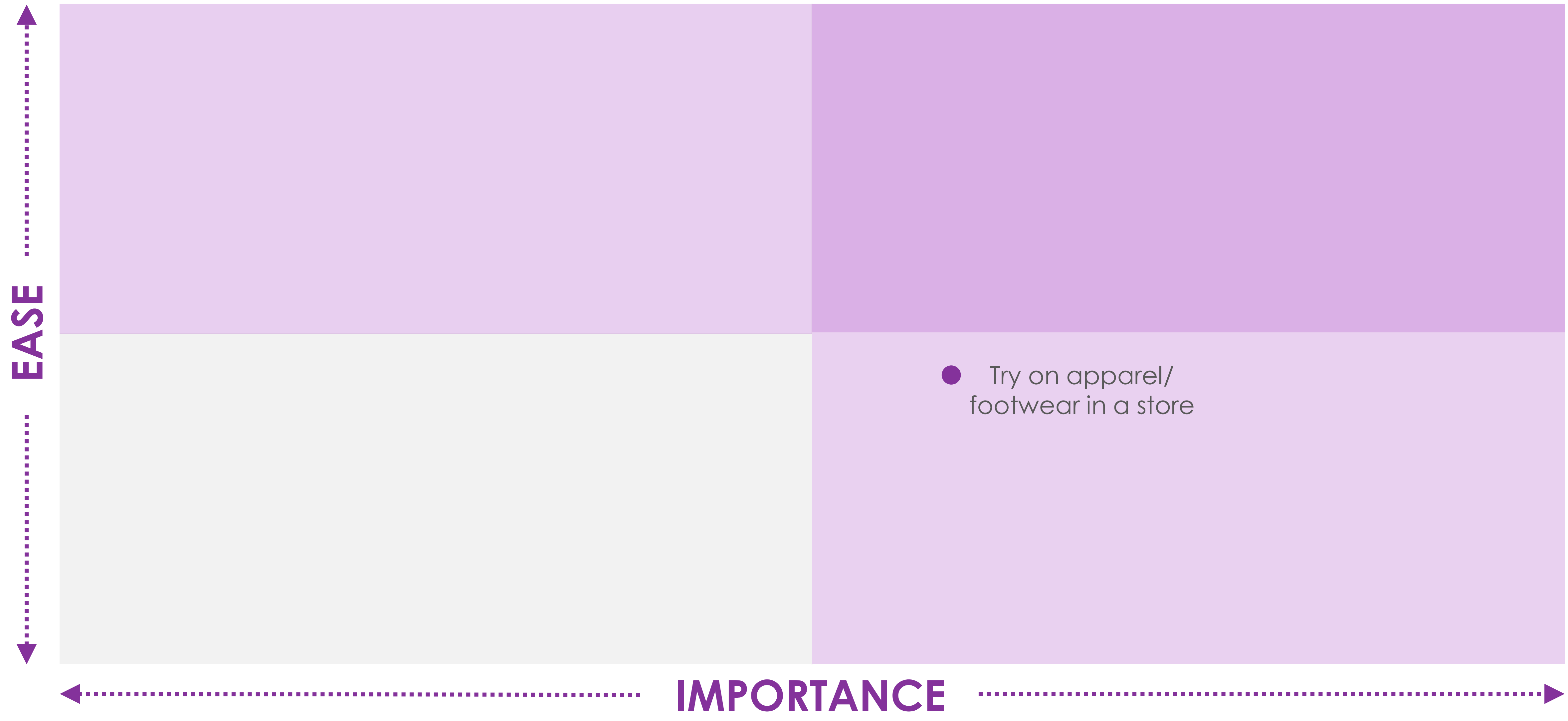
ACTIVITIES WITH LIMITED APPEAL



ACTIVITIES THAT ARE STICKY… FOR NOW



ACTIVITIES WITH CONSUMER TENSION



SHOPPING LOCAL AND SMALL

30%

say they will shop more at local small businesses even after the pandemic is over

ONLINE, MALL, OR FROM AN INDEPENDENT BUSINESS?

ONLINE vs. MALL vs. INDEPENDENT

Attitudes towards shopping options

- T2B ON 5PT AGREEMENT SCALE -

Mall Independent Online

100%
80%
60%
40%
20%
0%

WHAT'S GOING ON WITH GROCERY?

Why do people go grocery shopping: Acquire, Explore, Socialize

Use of online grocery (past month)

	Have been using for more than a month	Started using within the past months	Total
Grocery pick-up service	17%	13%	30%
Grocery delivery service	15%	11%	27%

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GROCERY ONLINE vs. IN-STORE

ONLINE GROCERY IS PRIMARILY DRIVEN BY SAFETY

Attitudes towards shopping options – grocery

- T2B ON 5PT AGREEMENT SCALE -

Store Online

100%

80%

60%

40%

20%

0%

PPE IS LIKELY HERE TO STAY

Activities where half or more Canadians feel PPE will be necessary

- Travel on an airplane
- Visit movie theaters, concerts, sports arenas, etc.
- Visit a bank branch
- Use public transportation
- Use ride sharing services
- Visit a shopping center or mall
- Shop at a local small business

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MOVING FORWARD

- Holidays will be more omnichannel than ever before
- The model for behaviour change is universal; accelerators and inhibitors differ by activity
- Many things will snap back

5/36 = 14%

Let's talk

Q&A