



Staying ahead of Canadian online shopping behaviours

Presented by



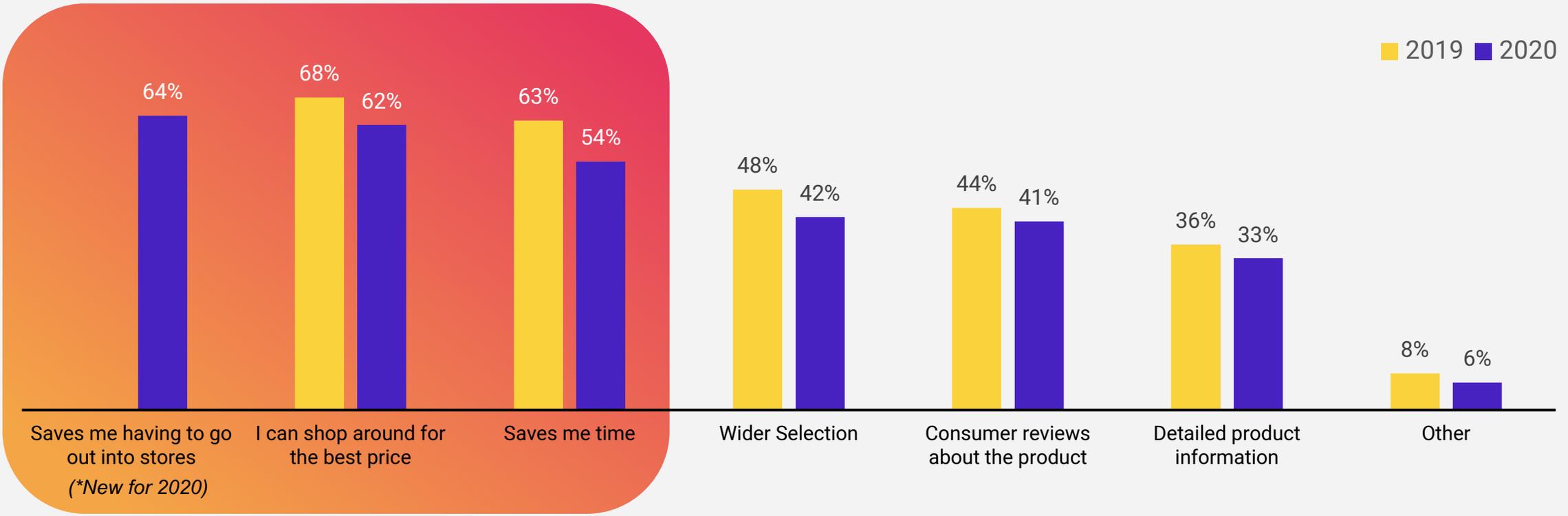
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Online consumption behaviors have been constantly evolving along the past years and without question, the year 2020 has set an unprecedented mark. The acceleration of eCommerce and its effects on the consumers decision journey are more noticeable than ever before. In Canada, for brands to remain successful in this new reality it is fundamental to have an understanding of these behaviours from a local perspective and more importantly, be able to assess how these can translate into actionable & strategic interventions along what should be the growth key pillars to grow customer flow in eCommerce: Experience, Content, Media & eRetail.

Key findings

- Convenience is the primary factor affecting online shopping with consumers citing that not having to go out into stores (64%), being able to shop around for the best price (62%) and saving them time (54%) as the top three advantages.
- 63% of Canadians browse on Amazon to discover products, but Amazon was not the #1 online purchase platform in the top 6 categories where they were ranked highest for product discoverability including Clothing, Shoes and Accessories (71%), Consumer Electronics (51%), Health & Beauty (47%), and Books (43%). This suggests that shoppers are researching and browsing in these categories on Amazon before making their final purchase decision elsewhere.
- 89% of consumers intend to use eCommerce Pure Play Retailers (primarily Amazon) in the future (consideration +6% over past 6 months usage), but Big Box Specialty and General Merchandise eRetail platforms are showing the strongest signs of future growth (+18% and 16% over past 6 months usage respectively). Brands should adopt best content practices across all relevant retailer platforms to provide their consumers with consistent brand messaging regardless of where they shop.
- eCommerce platforms are the #1 source of influence for shoppers at each stage of their decision journey - Discovery (33%), Research (21%), Purchase (25%). This reflects a convergence of the online funnel as multiple touchpoints can lead consumers to be one click away from purchase, and traditional campaigns focusing only on upper funnel considerations may no longer be as effective in the digital space.
- Advertising influence accelerating in importance with 33% of shoppers influenced to purchase online based on an ad compared to 23% in the prior year, particularly with aspirational categories including Clothing, Shoes, and Accessories, Consumer Electronics, and Health & Beauty which over indexed compared to the category average.

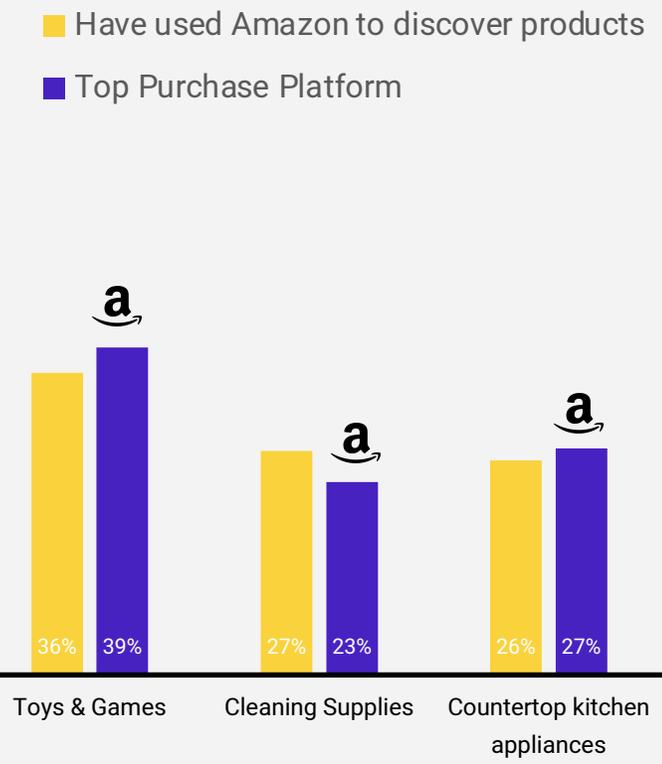
Convenience key advantage of online shopping for consumers



Convenience #1

Q3. What do you perceive as the advantages of online shopping? Total Base n = 1500;

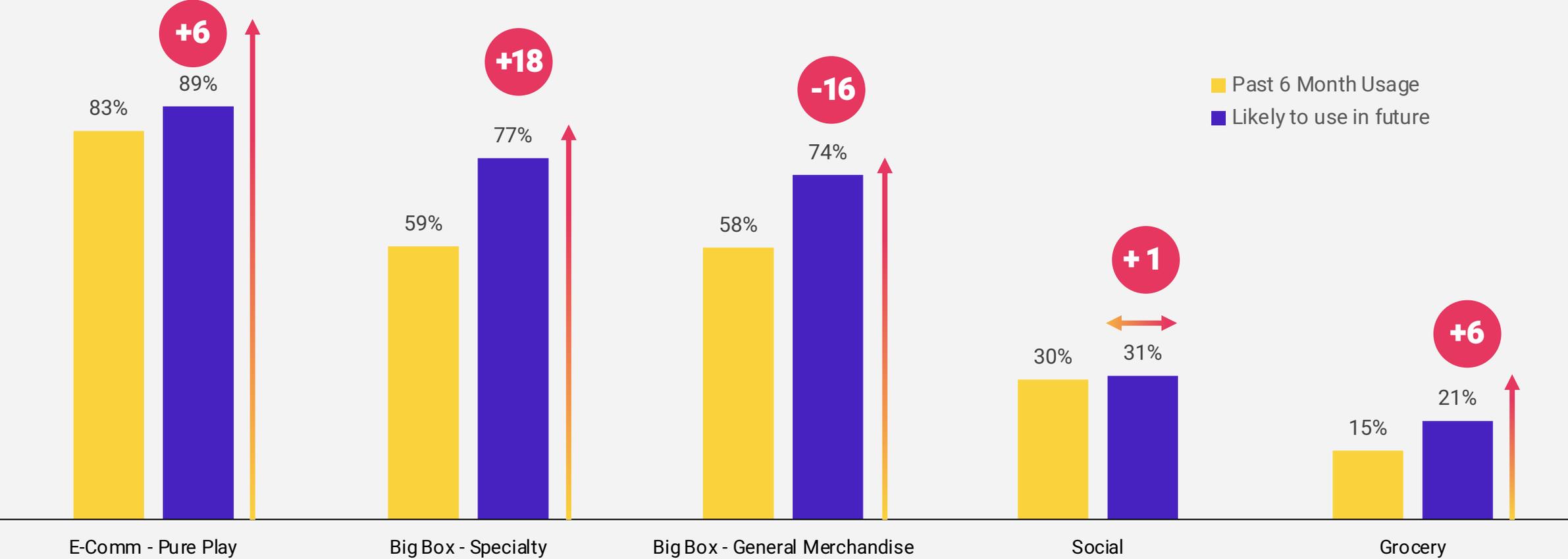
Canadians browse on Amazon to discover products, but tend to prefer purchasing from Specialty retailers



Q5. Which of the following product categories have you shopped online for in the past year. Total Sample Base n = 1500; Have used Amazon to discover new products base n = 945

Q17. Which of the categories are you most likely to shop on Amazon.ca? Base n = 151 to 1478
Q15. Where are you most likely to purchase these products online? Pick one for each category.

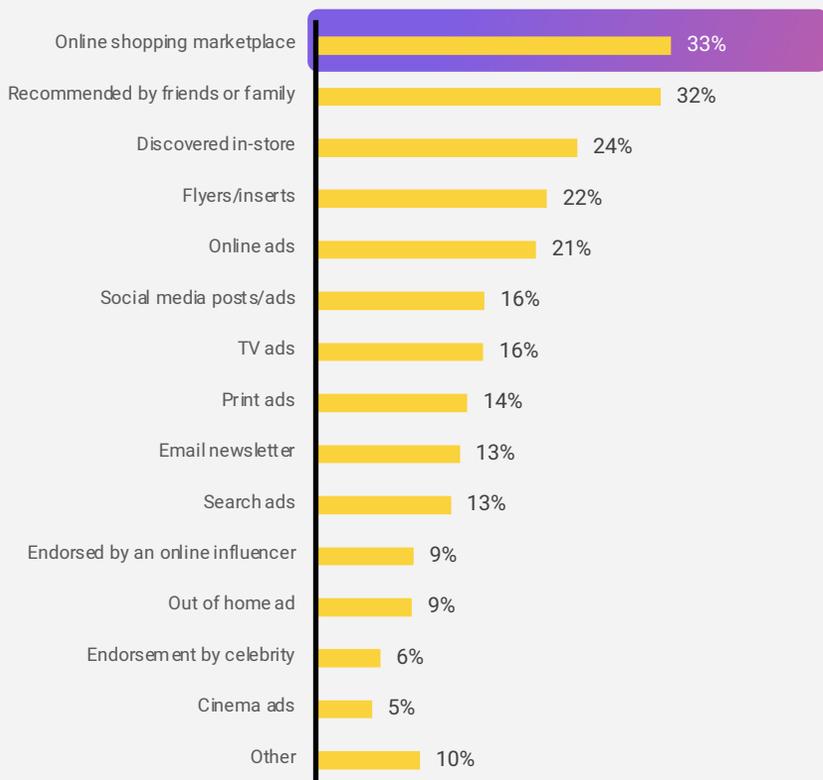
eCommerce Pure Play platforms continues to lead but Big Box Specialty and General Merchandise stores display strong signs of future growth



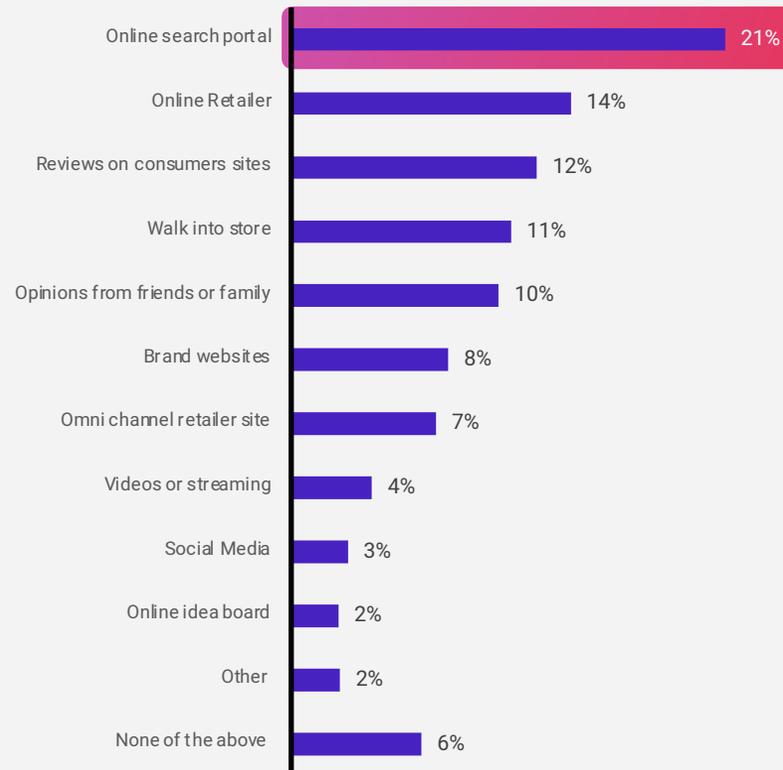
Q5. Which of the following product categories have you shopped online for in the past year. Total Sample Base n = 1500; Have used Amazon to discover new products base n = 945

Online platforms #1 source of influence across the consumer journey

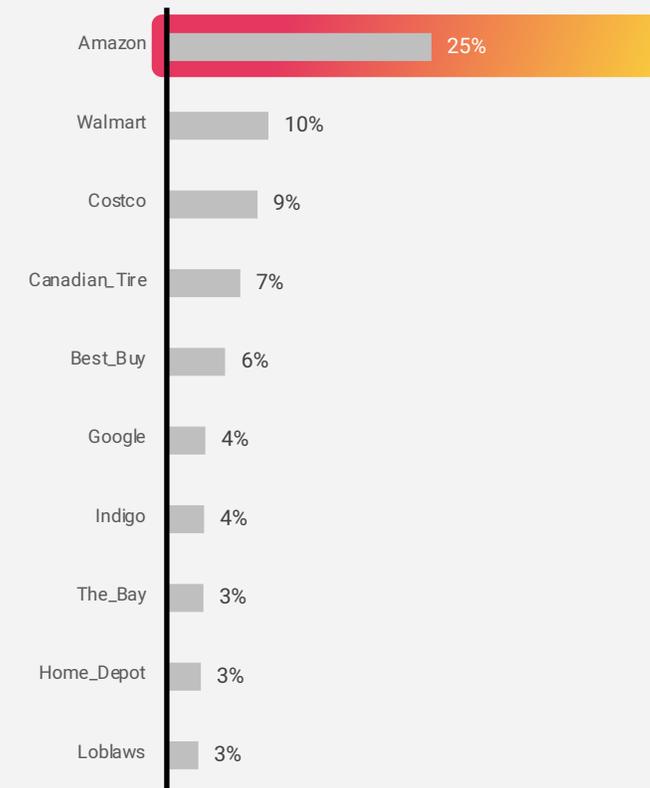
Discovery



Research



Purchase



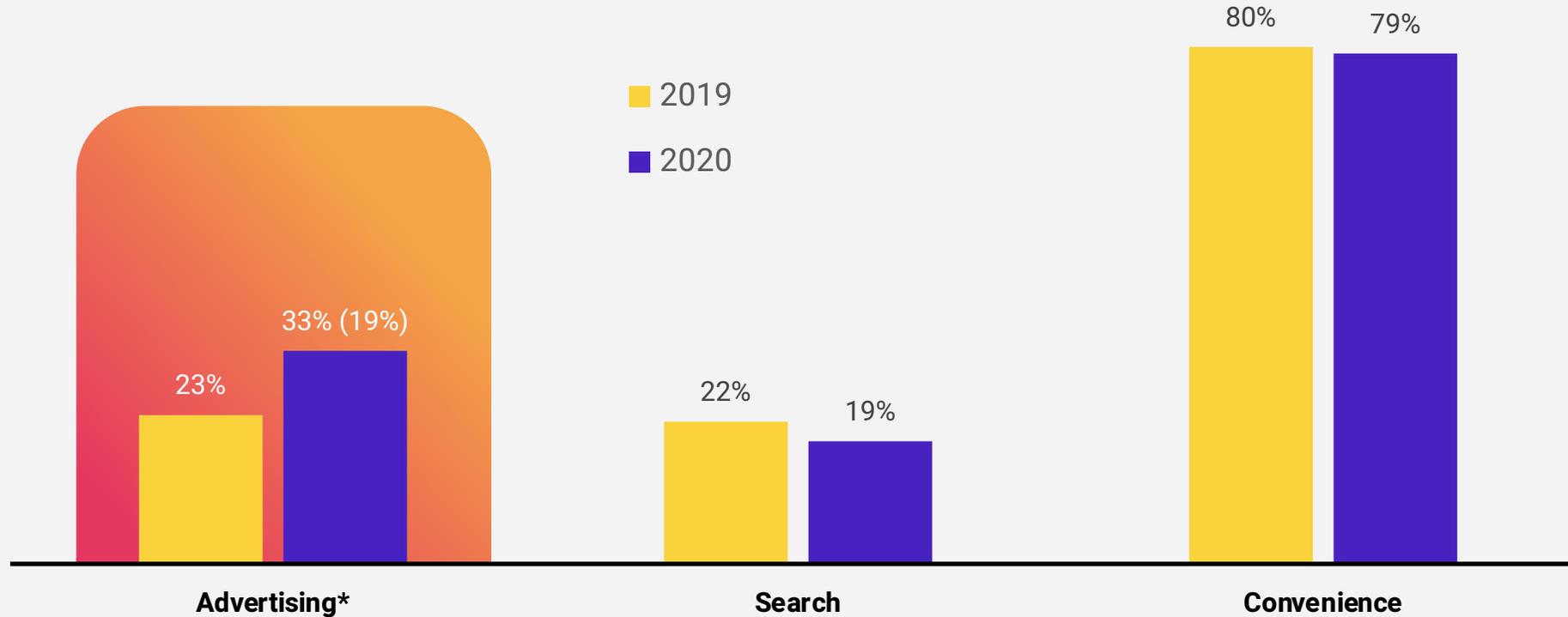
Q12. When you are thinking of buying a new product, which of the following sources are the most useful in discovering new products? Base n = 1500

Q13. What is usually your first point of research when you are considering buying a product online? Base n = 1500

Q14. Which other sources do you use to research before purchasing these category products online? Base n = 1500

Q15. Where are you most likely to purchase these products online? Pick one for each category. Base n = 1500

Convenience primary factor affecting online shopping, but advertising accelerating in importance



Q7. Thinking about the last time you shopped online for these categories, how did you make your decision to shop online? Total Base n = 1500

Advertising bucket: "I clicked on an ad of product while browsing online"; "Saw an ad online"; "It was endorsed by a social media personality I follow."; ****Saw a deal online" added 2020**

Search bucket: "Web browser search (e.g. Google, Bing)"

Convenience bucket: "It was not available in-store near me"; "Convenient for me instead of going into physical store"; "The product is only sold online"