



eCommerce Customer Experience Tracker

CANADIAN GROCERY RETAILERS

Q4 2020 | October 19 - November 17

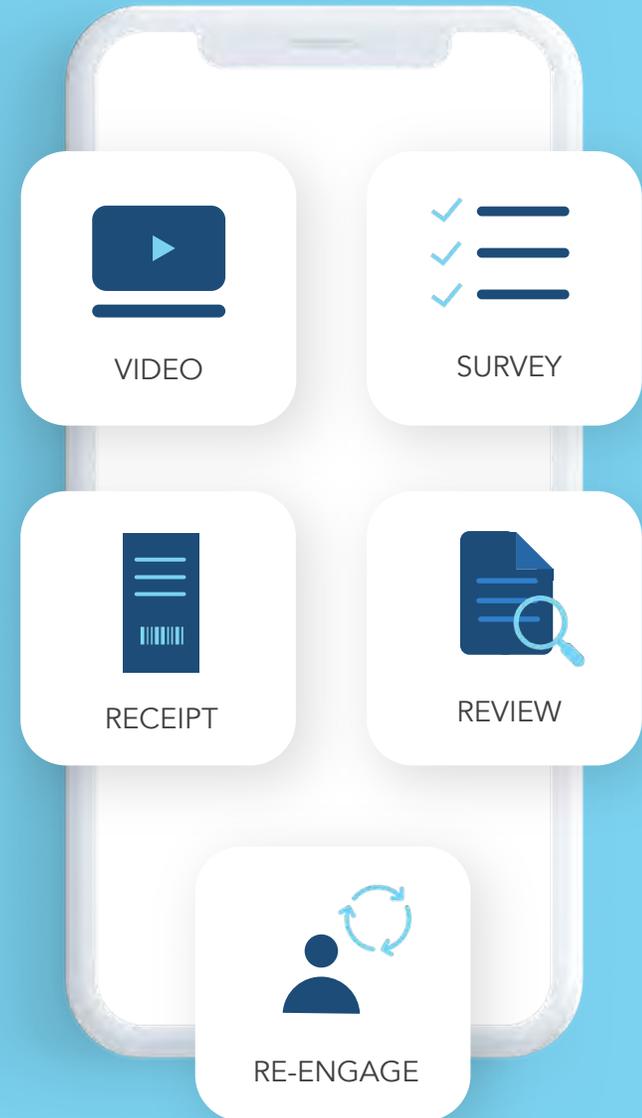


Make better decisions, faster, with access to rapid insights
at **every stage** of the consumer journey

How It Works

Capture relevant insights for any challenge or opportunity. Engage seamlessly with shoppers at every stage of the consumer journey by leveraging the **Caddle suite of tools**.

Caddle rewards panel members for actions ranging from video, survey, receipt capture, reviews, and more.



Largest Canadian Panel In Market

Panel Details



Largest daily active panel in Canada:
10,000+ DAUs and
100,000+ MAUs



Every type of shopper



Canadian representative samples



Holistic understanding across path to purchase



Engaged users rewarded for actions



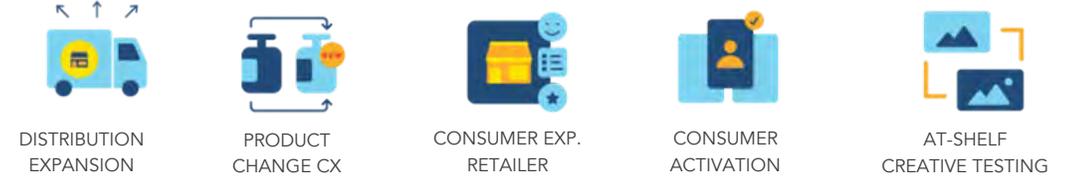
Dynamic, on-demand reporting dashboard

Macro and niche data verticals including:

- New Moms
- Costco Shopper
- Amazon prime members
- Cannabis consumers
- Health professional
- Luxury Shoppers
- Shopper Dad
- Repeat purchasers
- Vegan buyers

Caddle's Suite of Tools Unlock Insights Across Functions

EQUIP **SHOPPER MARKETING**
TO SELL SMARTER



ACCELERATE **INSIGHTS** TO
MAKE DECISIONS FASTER



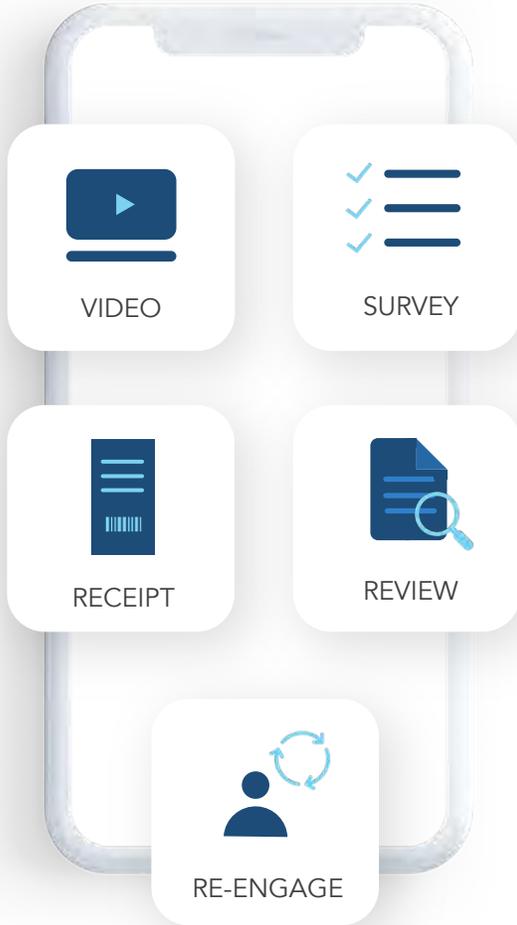
EMPOWER **CATEGORY** WITH
THOUGHT LEADERSHIP



DRIVE **BRAND** GROWTH
WITH REAL-TIME INSIGHTS



ACCELERATE **ECOMM** GROWTH
WITH OMNI-INSIGHTS



GROCERY RETAIL CUSTOMER EXPERIENCE (CX) TRACKER

Caddle launched a first-of-its-kind eCommerce Canadian Grocery Retail Tracker, looking at consumer preference across all of the major online Canadian grocery retailers. The data has been weighted by region, gender, and age, based on the most recent Canadian census figures to ensure that the sample reflects Canada's population. This report summarizes the results for 5 weeks of data collection, which includes 7,209 completed surveys

- Net Promoter Score
- 12 Attributes:

1. Easy to pick up order
2. User-friendly app/site
3. Availability of items
4. Fresh food quality
5. Payment options
6. Keeping you updated
7. Order availability/quick delivery
8. Cleanliness & hygiene
9. Order accuracy
10. Return policy
11. Price online vs. in-person
12. Secure transaction

eCommerce Grocery Retailers We Tracked

Weekly Tracker Results October 19 - November 17

n = 7,209



WINNER

Amazon takes

1st

place in 7 of 12 attributes, and

Top 3

In 11 of 12 attributes

HOME DELIVERY VS. CLICK & COLLECT

50%

of consumers access eCommerce equally (50/50) in *home delivery* and *click & collect*. When excluding Amazon, this shifts marginally (43/57). Both avenues must be optimized and are **critical to winning in eCommerce**

LOW LOYALTY

1 in 2

consumers are *likely to use a different retailer* next time they shop for groceries online. Loyalty is low and consumers are trying different providers. Big opportunity to win (and lose) eCommerce shoppers

TOP 2 ATTRIBUTES

Nailing *User-Friendly App/Site & Availability of Items* are the top key attributes to drive amongst top retailers in order to drive NPS and win in eCommerce

Net Promoter Score by eCommerce Banner

Net Promoter Score (NPS) is a trusted research methodology and provides an index that measures the willingness of customers to recommend a company's products or services to others based on their experience

Net Promoter Score | National

NPS = % Promoters (9-10 ratings) minus % Detractors (0-6 ratings)

eCommerce Banner Rankings	NPS - National
Amazon	66
Costco.ca	52
PCEexpress.ca	51
Walmart.ca	45
Saveonfoods.com	42
Metro.ca	33
Instacart	27
Voila.ca	21
GroceryGateway.com	13
IGA.net	3
Londondrugs.com	-8

Net Promoter Score | Regional

NPS = % Promoters (9-10 ratings) minus % Detractors (0-6 ratings)



Rank 1st



Rank 2nd



Rank 3rd

eCommerce Banner Rankings	BC	Prairies	Ontario	Quebec	Atlantic
Amazon	57	69	61	75	74
Costco.ca	59	51	47	59	52
PCExpress.ca	39	47	53	42	81
Walmart.ca	22	55	39	54	54
Saveonfoods.com	60	16	-	-	-
Metro.ca	-	-	3	66	-
Instacart	-17	37	40	-	-
Voila.ca	-	-	21	-	-
GroceryGateway.com	-	-	13	-	-
IGA.net	-29	-	-12	13	-
Londondrugs.com	8	-	-	-	-

Overall Online Shopping Experience Across 12 Factors

1. Easy to pick up order
2. User-friendly app/site
3. Availability of items
4. Fresh food quality
5. Payment options
6. Keeping you updated
7. Order availability/quick delivery
8. Cleanliness & hygiene
9. Order accuracy
10. Return policy
11. Price online vs. in-person
12. Secure transaction

Overall Online Shopping Experience | National

NET SCORE = % 9-10 ratings minus % 0-6 ratings

eCommerce Banner Rankings	Net Score - National
Amazon	65
Costco.ca	53
PCExpress.ca	46
Walmart.ca	40
Metro.ca	37
Saveonfoods.com	36
Instacart	33
Voila.ca	29
GroceryGateway.com	19
IGA.net	17
Londondrugs.com	-12

Overall Online Shopping Experience | Regional



Rank 1st



Rank 2nd



Rank 3rd

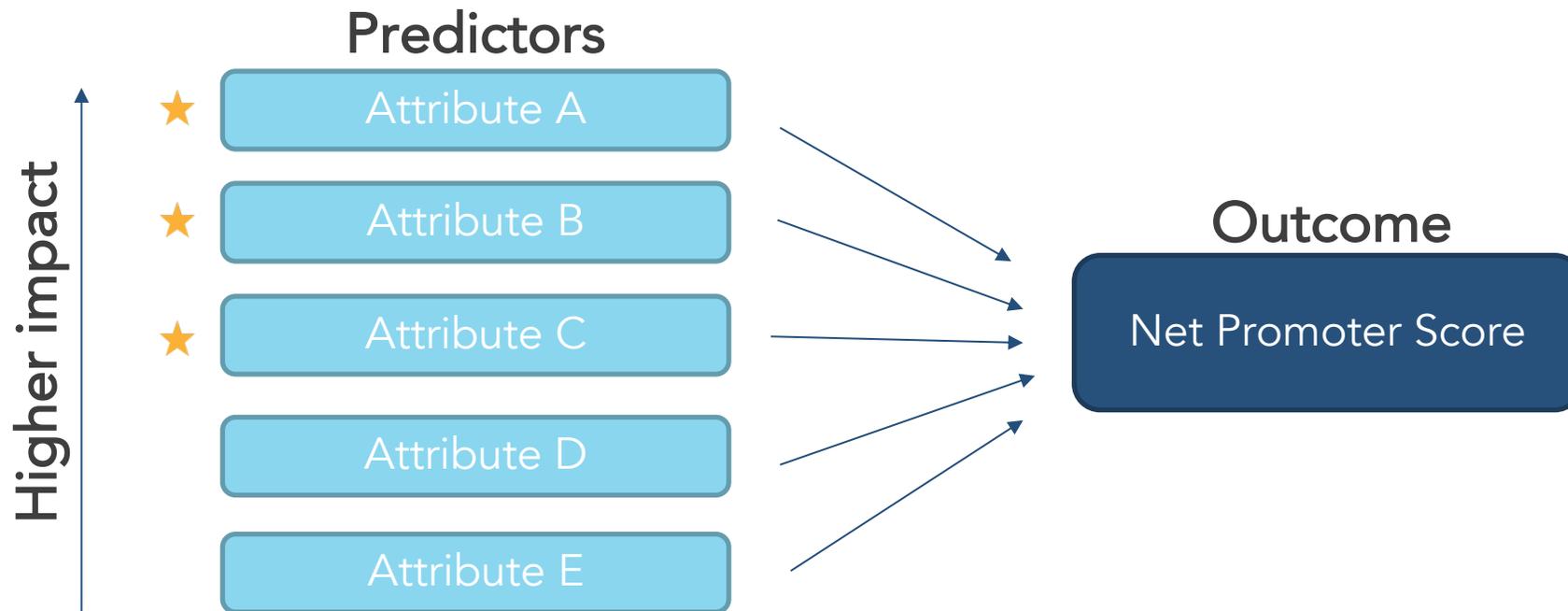
NET SCORE = % 9-10 ratings minus % 0-6 ratings

	BC	Prairies	Ontario	Quebec	Atlantic
Amazon	59	64	62	71	68
Costco.ca	56	49	49	60	60
PCExpress.ca	37	48	47	30	74
Walmart.ca	21	47	34	55	51
Metro.ca	-	-	21	62	-
Saveonfoods.com	51	15	-	-	-
Instacart	15	32	40	-	-
Voila.ca	-	-	29	-	-
GroceryGateway.com	-	-	19	-	-
IGA.net	8	-	8	20	-
Londondrugs.com	-13	-	-	-	-

Key Driver Analysis by Banner

Key Driver Analysis was conducted separately for each banner to identify attributes with the most impact on Net Promoter Score using a stepwise multilinear regression analysis

- Consumers rated satisfaction among 12 attributes, used to measure the impact of each attribute in the overall NPS for each banner
- Key Drivers are used to prioritize areas to focus on, but do not need to match the banners' highest/lowest performance metrics.
- The Top 3 Drivers (predictors) from this analysis have been identified in the following slides





★ Top 3 NPS Key Drivers
Based on a stepwise linear regression analysis

REGION, NPS (RANK)

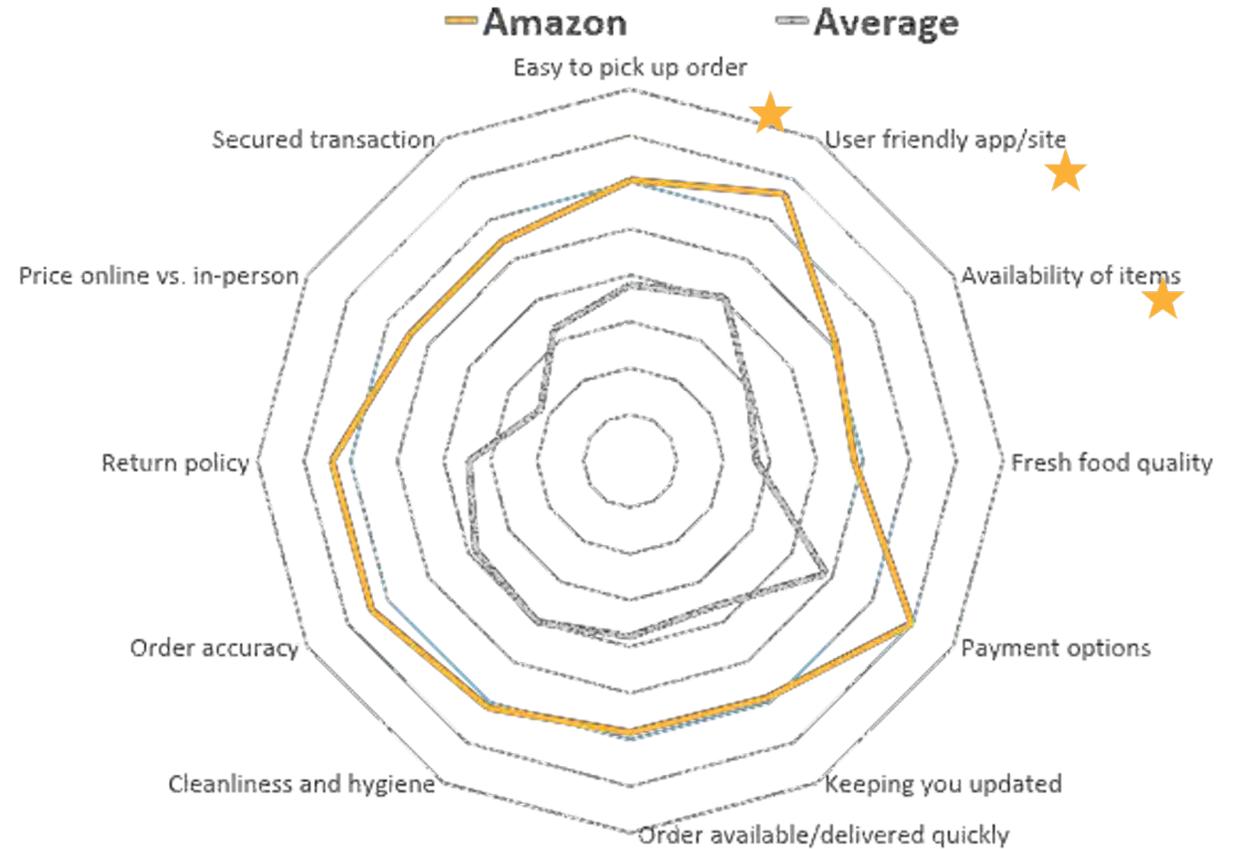
National 66 (1)
BC 57 (3)
Prairies 69 (1)
Ontario 61 (1)
Quebec 75 (1)
Atlantic 74 (2)

HIGHEST NPS SUB-GROUPS

Women Gen Z	76
Men Gen Z	76
Men Boomers	76
>150K	75
Women Gen X	74
75K to <100K	70
<50K	69

LOWEST NPS SUB-GROUPS

Women Millennials	65
Women Boomers	63
100K to <150K	63
Men Gen X	60
Men Millennials	59
50K to <75K	57
Women Millennials	65





★ Top 3 NPS Key Drivers
Based on a stepwise linear regression analysis

REGION, NPS (RANK)

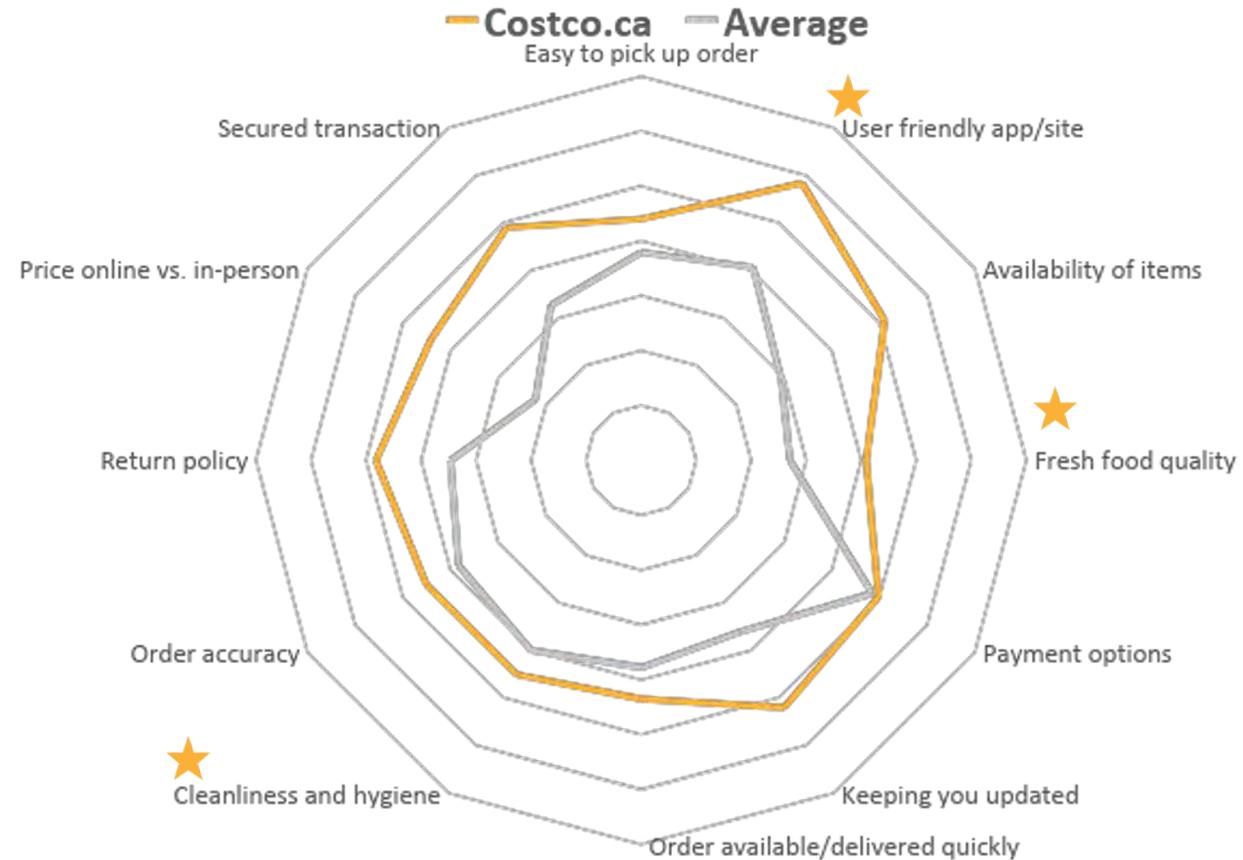
National 52 (2)
BC 59 (2)
Prairies 51 (3)
Ontario 47 (3)
Quebec 59 (3)
Atlantic 52 (4)

HIGHEST NPS SUB-GROUPS

Men Boomers	63
Women Boomers	61
>150K	60
Women Gen X	58
100K to <150K	58
75K to <100K	57
50K to <75K	56

LOWEST NPS SUB-GROUPS

Women Millennials	53
Men Millennials	53
Men Gen X	49
<50K	49
Women Gen Z	41
Men Gen Z	40





★ Top 3 NPS Key Drivers
Based on a stepwise linear regression analysis

REGION, NPS (RANK)

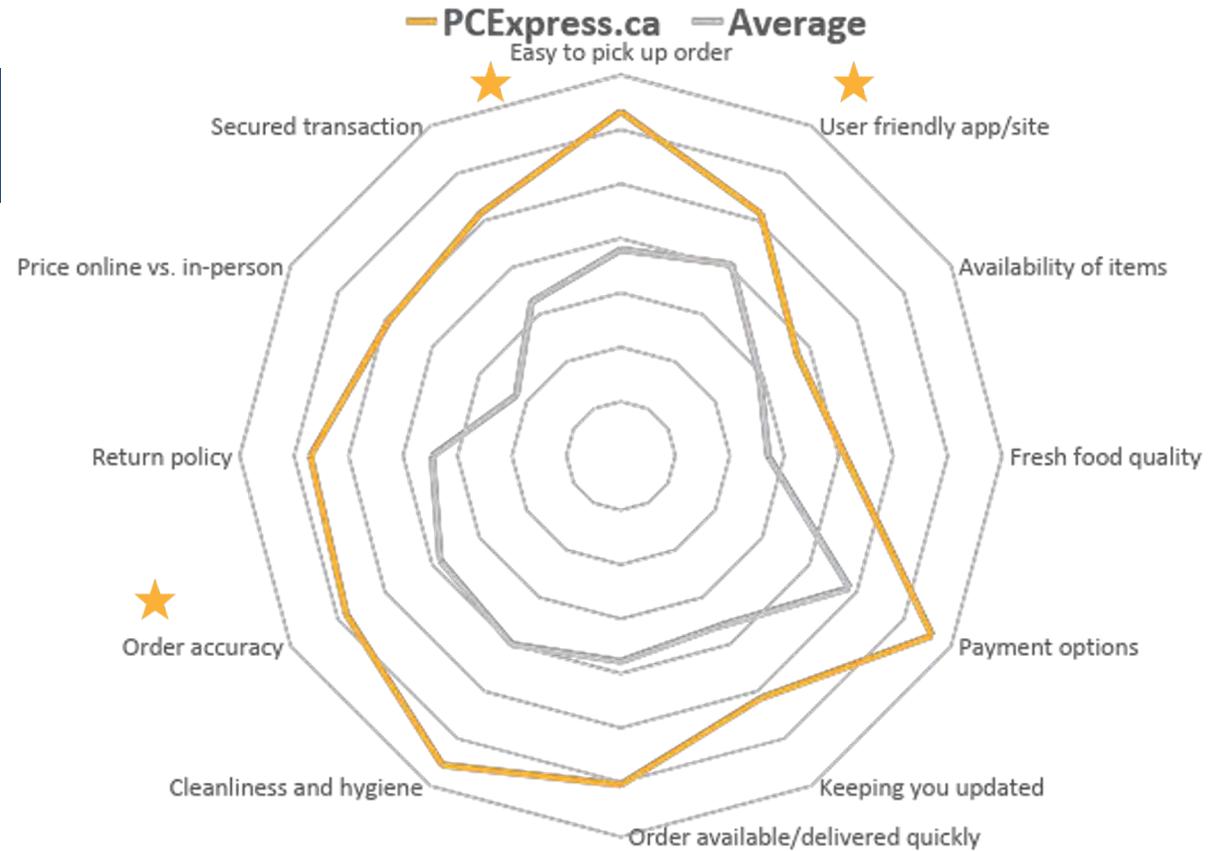
National 51 (3)
BC 39 (4)
Prairies 47 (4)
Ontario 53 (2)
Quebec 42 (5)
Atlantic 81 (1)

HIGHEST NPS SUB-GROUPS

75K to <100K	59
Women Boomers	58
Women Gen X	56
Men Boomers	56
<50K	56
Men Gen X	52
100K to <150K	51

LOWEST NPS SUB-GROUPS

Women Gen Z	50
50K to <75K	50
Women Millennials	48
Men Millennials	42
>150K	34





★ Top 3 NPS Key Drivers
Based on a stepwise linear regression analysis

REGION, NPS (RANK)

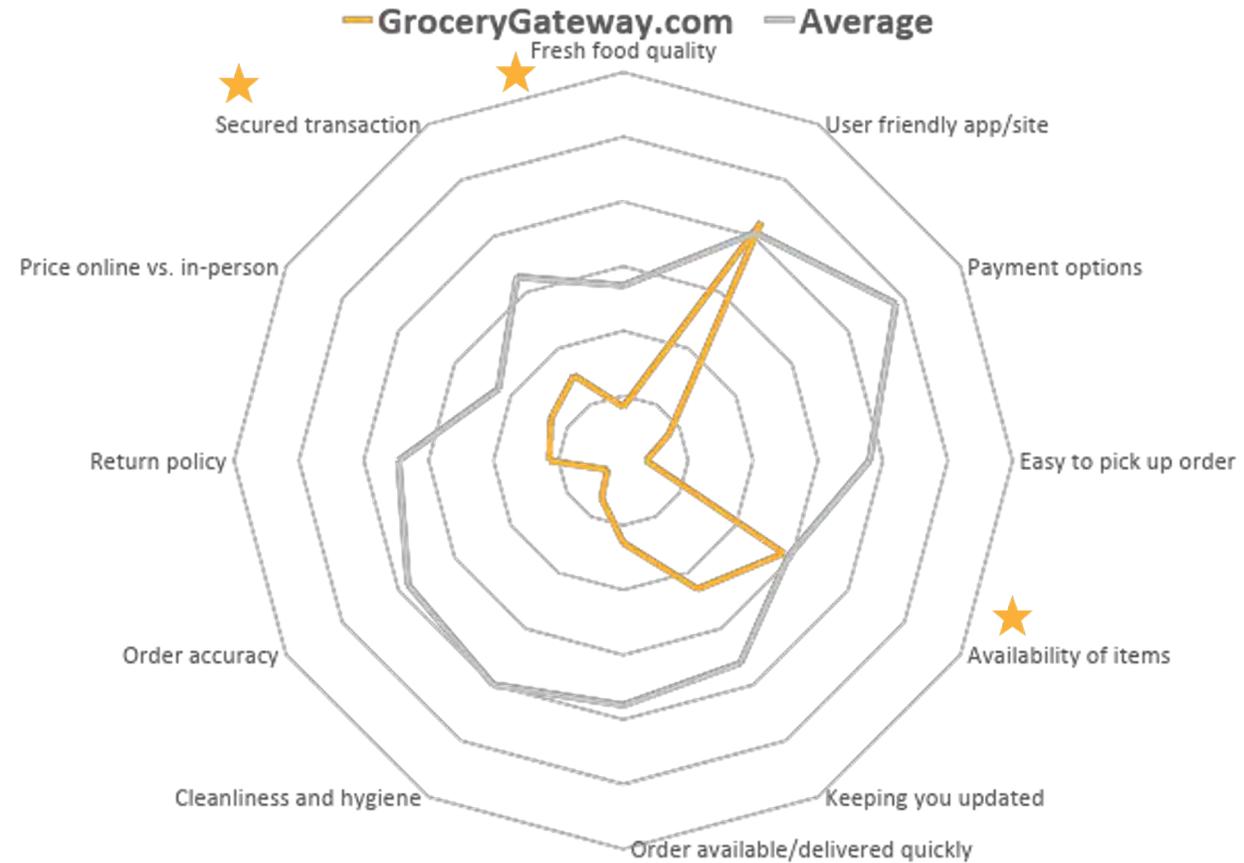
National 13 (9)
BC -
Prairies -
Ontario 13 (7)
Quebec -
Atlantic -

HIGHEST NPS SUB-GROUPS

>150K	50
Men Gen Z	35
Women Gen X	26
75K to <100K	26
Women Boomers	18
100K to <150K	17

LOWEST NPS SUB-GROUPS

Women Millennials	11
Men Millennials	7
Men Gen X	5
<50K	0
50K to <75K	0
Women Gen Z	-8





★ Top 3 NPS Key Drivers
Based on a stepwise linear regression analysis

REGION, NPS (RANK)

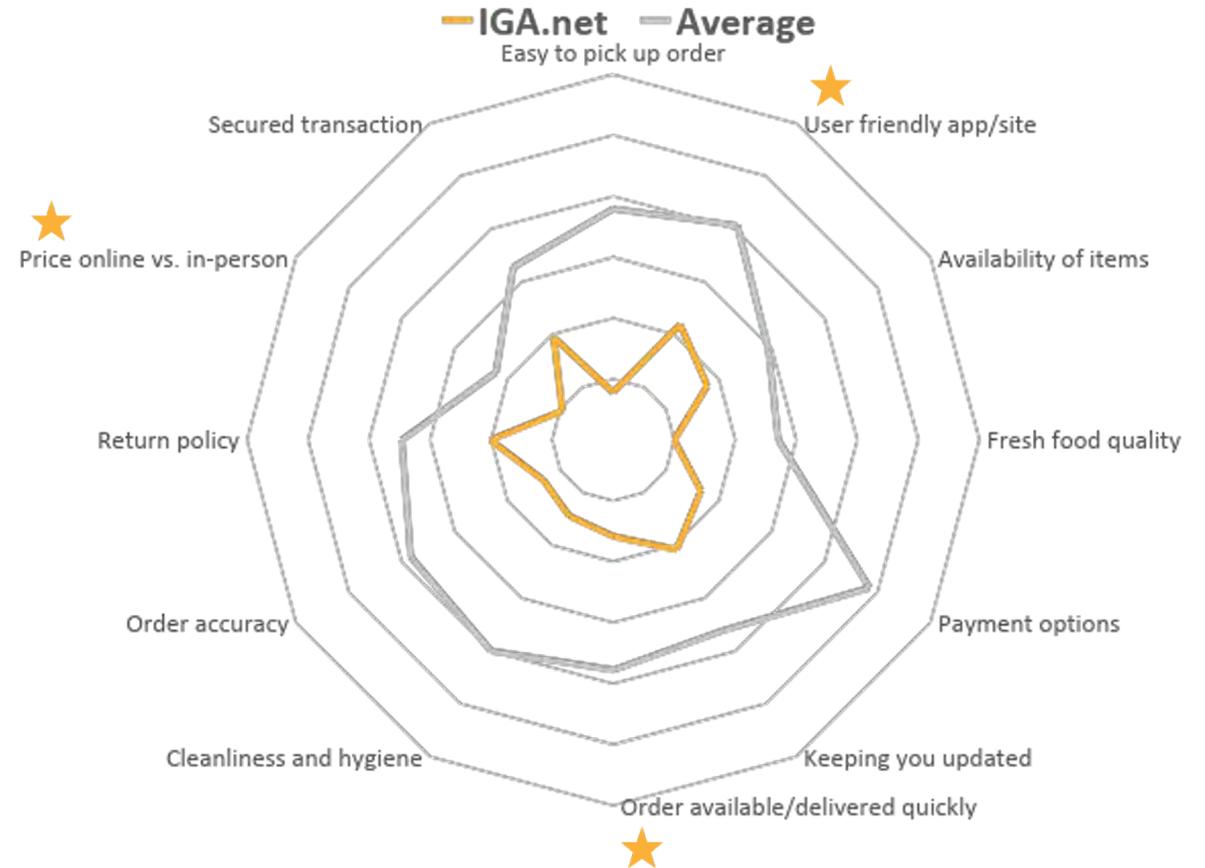
National 3 (10)
BC -29 (8)
Prairies -
Ontario -12 (9)
Quebec 13 (6)
Atlantic -

HIGHEST NPS SUB-GROUPS

>150K	43
100K to <150K	42
Women Boomers	40
Women Gen X	26
Men Millennials	10

LOWEST NPS SUB-GROUPS

50K to <75K	5
75K to <100K	4
Women Millennials	-4
<50K	-7
Men Gen X	-7
Women Gen Z	-8
Men Gen Z	-60





★ Top 3 NPS Key Drivers
Based on a stepwise linear regression analysis

REGION, NPS (RANK)

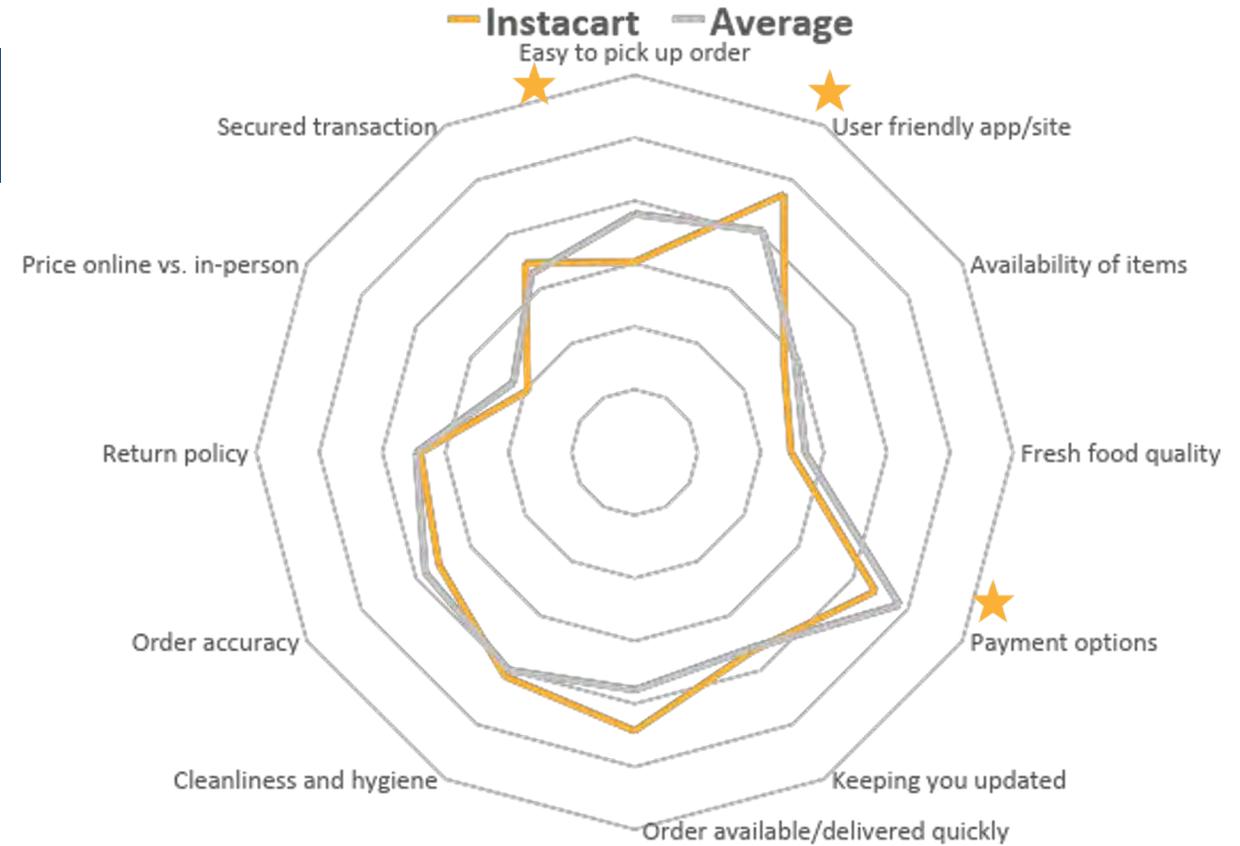
National 27 (7)
BC -17(7)
Prairies 37 (5)
Ontario 40 (4)
Quebec -
Atlantic -

HIGHEST NPS SUB-GROUPS

Men Boomers	100
Women Boomers	86
50K to <75K	37
Women Gen X	36
>150K	34
Women Millennials	29

LOWEST NPS SUB-GROUPS

<50K	27
Men Millennials	27
75K to <100K	27
100K to <150K	20
Men Gen X	1
Women Gen Z	-6
Men Gen Z	-54





★ Top 3 NPS Key Drivers
Based on a stepwise linear regression analysis

REGION, NPS (RANK)

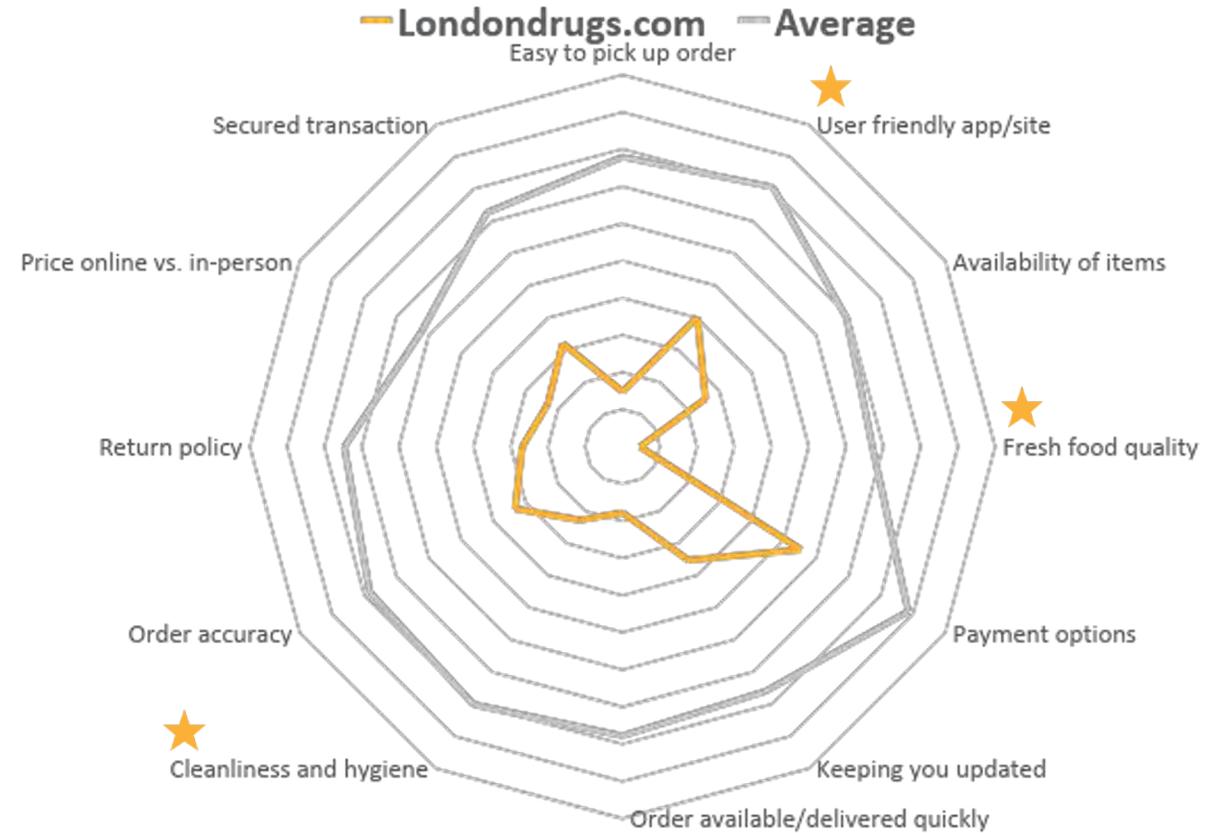
National -8 (11)
BC 8 (6)
Prairies -
Ontario -
Quebec -
Atlantic -

HIGHEST NPS SUB-GROUPS

Men Boomers	50
Men Gen X	25
Women Millennials	8
100K to <150K	7
<50K	-7

LOWEST NPS SUB-GROUPS

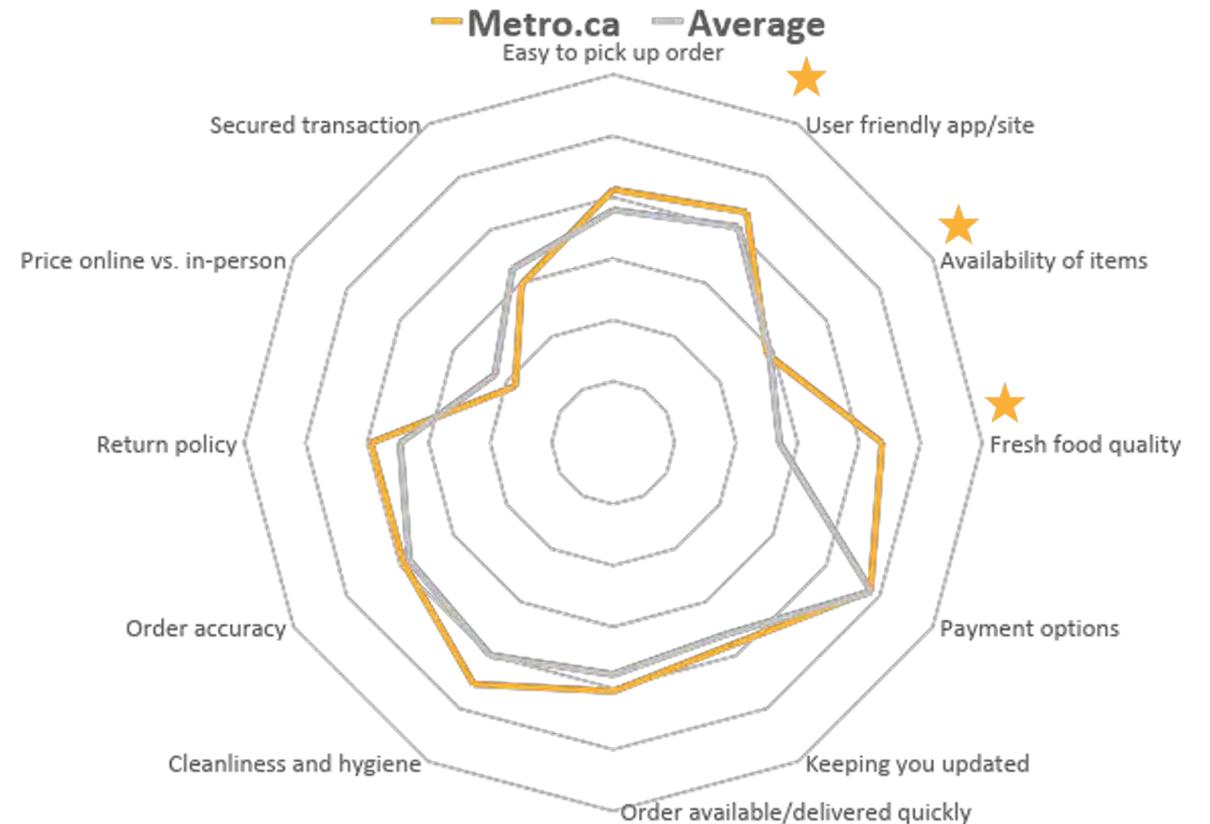
Women Gen X	-29
Women Gen Z	-39
Men Millennials	-48
50K to <75K	-61





★ Top 3 NPS Key Drivers
Based on a stepwise linear regression analysis

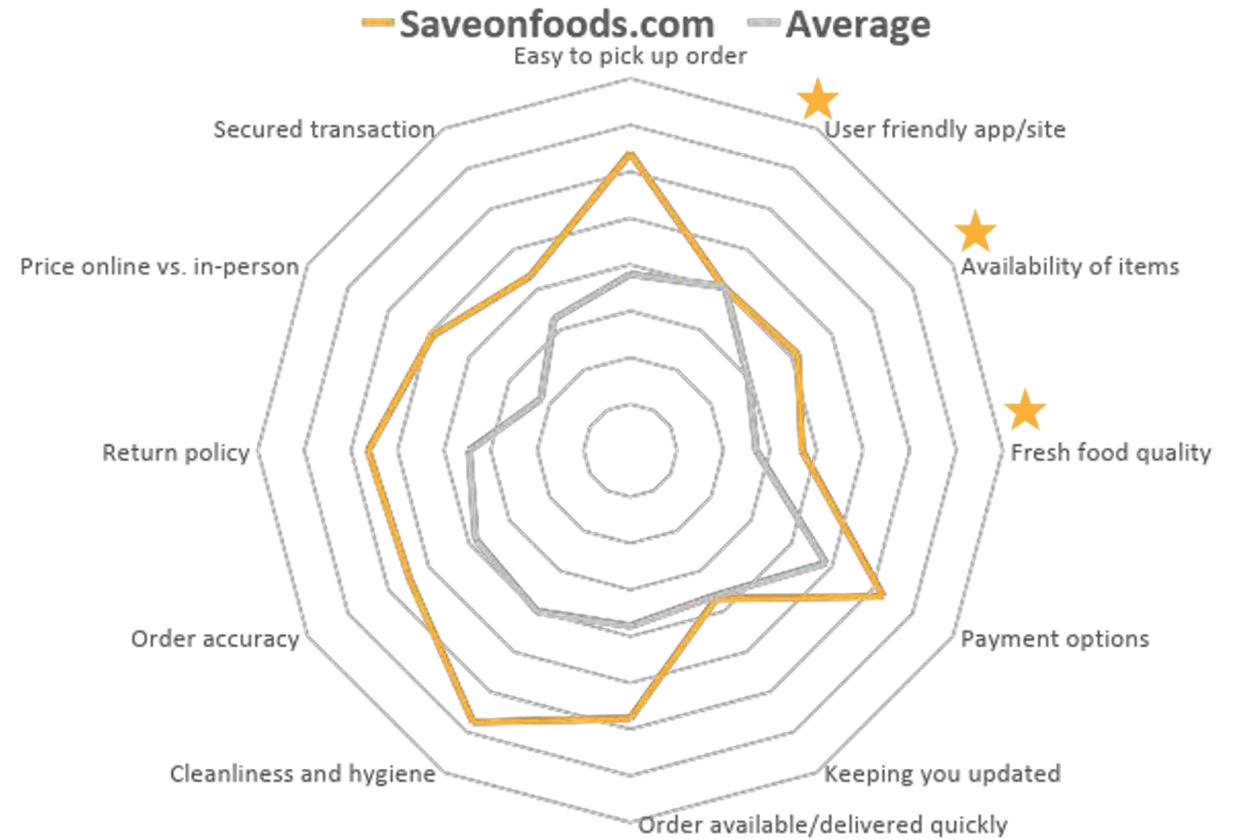
REGION, NPS (RANK)	HIGHEST NPS SUB-GROUPS	LOWEST NPS SUB-GROUPS
National 33 (6)	Men Boomers 90	Women Millennials 36
BC -	Women Gen Z 84	Men Millennials 34
Prairies -	50K to < 75K 67	> 150K 32
Ontario 3 (8)	Women - Gen X 58	100K to < 150K 21
Quebec 66 (2)	< 50K 49	75K to < 100K 15
Atlantic -	Women - Boomers 41	Men Gen X 8
		Men Gen Z -57





★ Top 3 NPS Key Drivers
Based on a stepwise linear regression analysis

REGION, NPS (RANK)	HIGHEST NPS SUB-GROUPS	LOWEST NPS SUB-GROUPS
National 42 (5)	Women Boomers 94 >150K 58	Men Gen X 1 50K to <75K -15
BC 60 (1)	Women Gen X 55 <50K 46	Men Millennials -21
Prairies 16 (6)	100K to <150K 41	Men Boomers -100
Ontario -	Women Gen Z 33 75K to <100K 29	
Quebec -	Women Millennials 27	
Atlantic -		





★ Top 3 NPS Key Drivers
Based on a stepwise linear regression analysis

REGION, NPS (RANK)

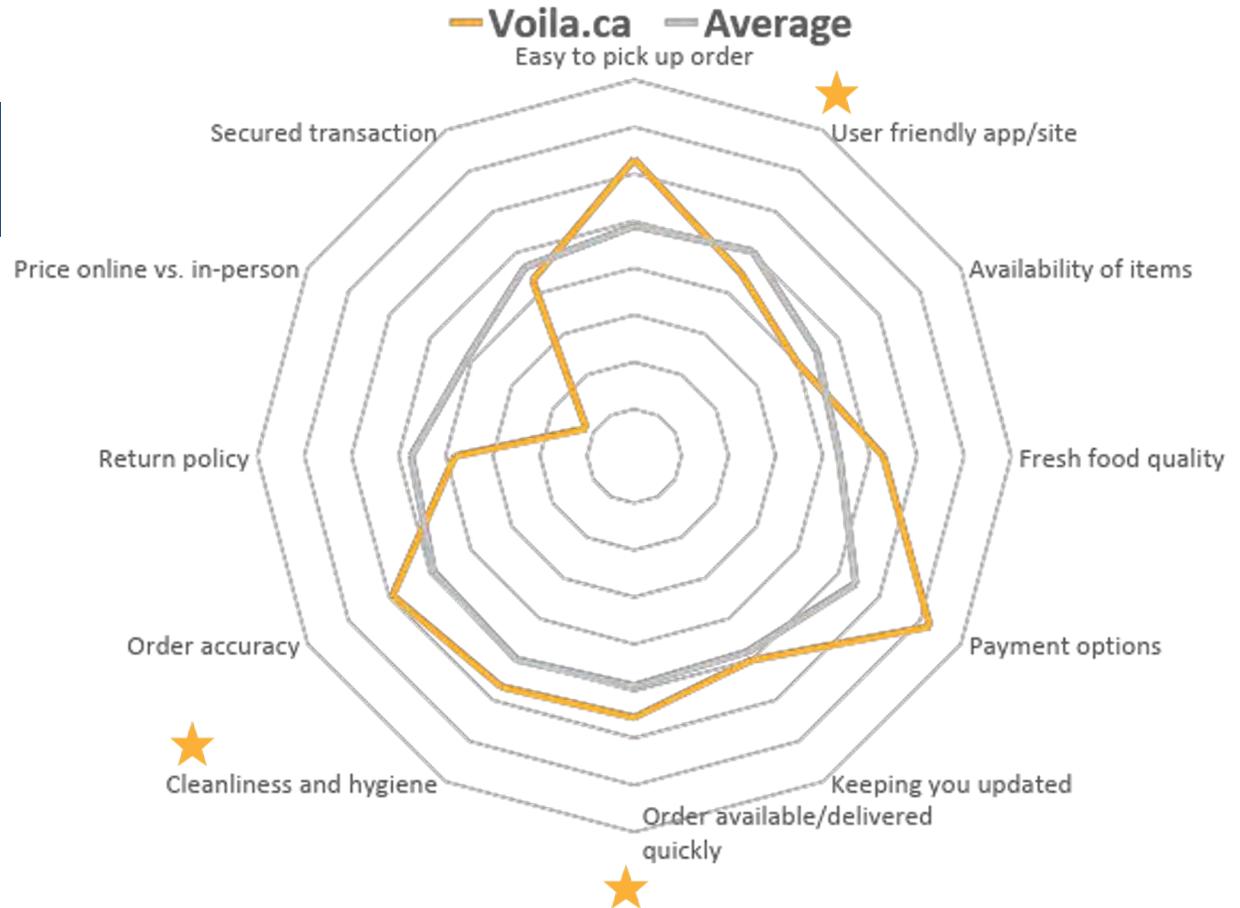
National 21 (8)
BC -
Prairies -
Ontario 21 (6)
Quebec -
Atlantic -

HIGHEST NPS SUB-GROUPS

Women Gen X	71
75K to <100K	38
100K to <150K	38
Women Millennials	29

LOWEST NPS SUB-GROUPS

<50K	12
50K to <75K	-2
Men Millennials	-25





★ Top 3 NPS Key Drivers
Based on a stepwise linear regression analysis

REGION, NPS (RANK)

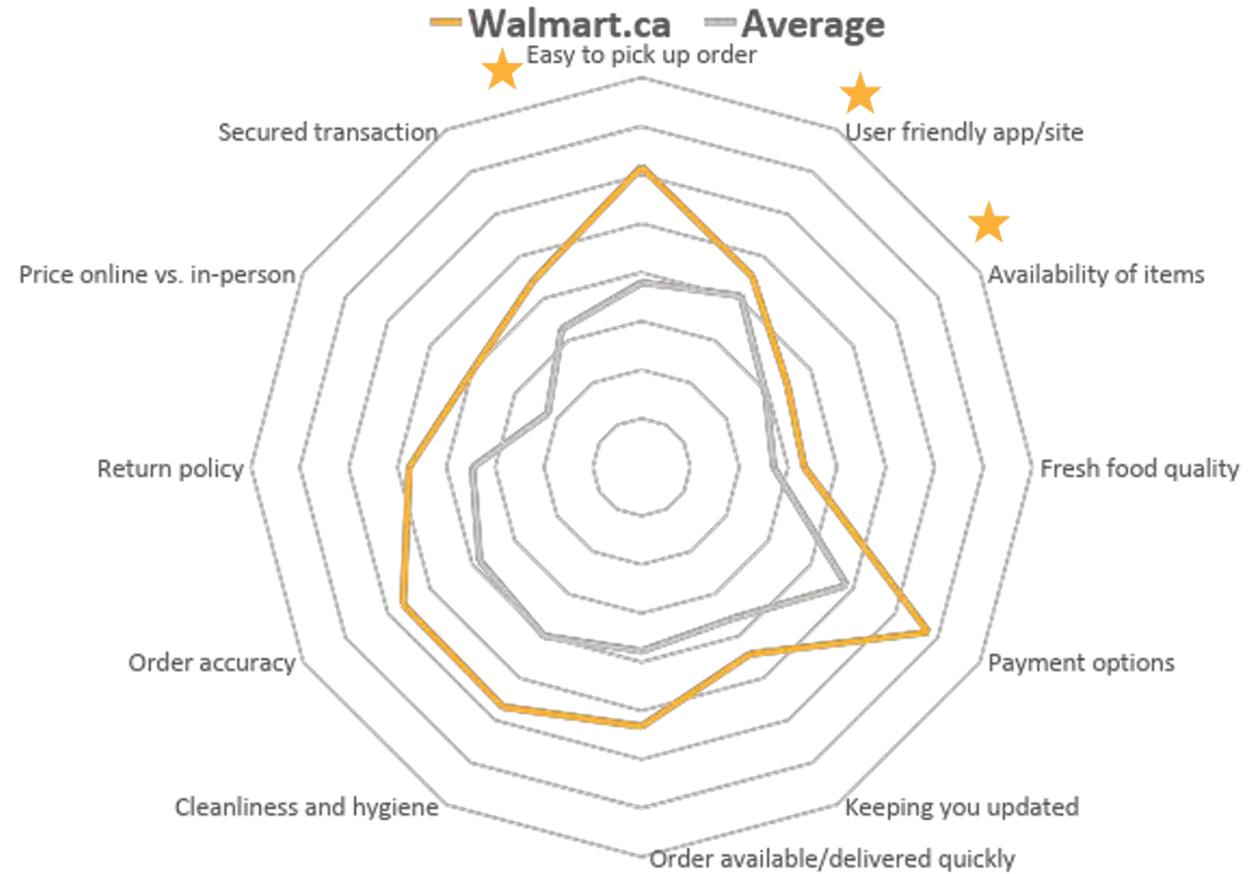
National 45 (4)
BC 22 (5)
Prairies 55 (2)
Ontario 39 (5)
Quebec 54 (4)
Atlantic 54 (3)

HIGHEST NPS SUB-GROUPS

75K to <100K	57
100K to <150K	55
Men Boomers	55
Men Gen X	52
Women Gen X	49
50K to <75K	49
Women Boomers	46

LOWEST NPS SUB-GROUPS

Women Gen Z	41
Women Millennials	41
Men Millennials	38
<50K	35
Men Gen Z	29
>150K	29



Attribute Ratings

1. Easy to pick up order
2. User-friendly app/site
3. Availability of items
4. Fresh food quality
5. Payment options
6. Keeping you updated
7. Order availability/quick delivery
8. Cleanliness & hygiene
9. Order accuracy
10. Return policy
11. Price online vs. in-person
12. Secure transaction

Attribute Ratings | National

NET SCORE = % 9-10 ratings minus % 0-6 ratings



Rank 1st



Rank 2nd



Rank 3rd

	Easy to pick up order	User friendly app/site	Availability of items	Fresh food quality	Payment options	Keeping you updated	Order available/delivered quickly	Cleanliness and hygiene	Order accuracy	Return policy	Price online vs. in-person	Secured transaction
Amazon	60	66	51	48	70	59	58	61	64	64	55	55
Costco.ca	44	58	51	41	50	52	44	45	45	48	44	49
PCExpress.ca	63	51	37	41	66	51	60	66	58	57	49	52
Walmart.ca	62	45	34	33	68	44	53	57	56	48	40	44
Saveonfoods.com	64	40	42	37	63	37	58	68	55	56	49	43
Metro.ca	41	43	29	44	48	38	41	45	39	39	18	30
Instacart	30	47	27	25	44	37	44	41	36	34	20	35
Voila.ca	66	30	20	46	85	40	51	53	58	16	-37	26
GroceryGateway.com	-1	36	27	9	13	23	14	7	10	4	7	17
IGA.net	8	22	18	10	17	21	16	14	13	20	10	20
Londondrugs.com	-25	0	-14	-35	15	-5	-22	-17	-7	-13	-17	-8

Attribute Ratings | B.C.

NET SCORE = % 9-10 ratings minus % 0-6 ratings



Rank 1st



Rank 2nd



Rank 3rd

	Easy to pick up order	User friendly app/site	Availability of items	Fresh food quality	Payment options	Keeping you updated	Order available/delivered quickly	Cleanliness and hygiene	Order accuracy	Return policy	Price online vs. in-person	Secured transaction
Amazon	53	63	41	45	68	53	44	49	58	60	56	49
Costco.ca	42	52	52	41	41	54	48	39	51	55	48	41
PCExpress.ca	50	48	32	29	55	51	51	47	52	53	58	54
Walmart.ca	26	18	10	16	37	23	38	15	51	23	17	18
Saveonfoods.com	65	55	49	47	77	52	64	69	56	63	57	54
Instacart	18	27	22	-4	20	32	22	12	23	16	10	28
IGA.net	-37	2	-11	-32	-19	-39	-33	-37	-37	-29	-39	-20
Londondrugs.com	-22	-5	-35	-33	39	17	-17	-3	-1	-5	-9	-11

Attribute Ratings | Prairies

NET SCORE = % 9-10 ratings minus % 0-6 ratings



Rank 1st



Rank 2nd



Rank 3rd

	Easy to pick up order	User friendly app/site	Availability of items	Fresh food quality	Payment options	Keeping you updated	Order available/delivered quickly	Cleanliness and hygiene	Order accuracy	Return policy	Price online vs. in-person	Secured transaction
Amazon	68	65	54	53	72	58	58	63	63	71	59	59
Costco.ca	50	57	56	54	62	54	49	58	56	62	46	58
PCExpress.ca	58	48	37	42	62	55	58	63	56	64	53	49
Walmart.ca	69	53	38	41	76	50	58	62	66	56	52	52
Saveonfoods.com	68	20	34	24	44	21	51	69	57	48	41	30
Instacart	27	33	0	43	46	27	49	52	47	36	8	44

Attribute Ratings | Ontario

NET SCORE = % 9-10 ratings minus % 0-6 ratings



Rank 1st



Rank 2nd



Rank 3rd

	Easy to pick up order	User friendly app/site	Availability of items	Fresh food quality	Payment options	Keeping you updated	Order available/delivered quickly	Cleanliness and hygiene	Order accuracy	Return policy	Price online vs. in-person	Secured transaction
Amazon	59	63	46	42	68	58	58	62	63	59	47	50
Costco.ca	40	57	47	36	47	48	39	40	39	42	38	46
PCExpress.ca	65	53	38	41	67	48	62	69	61	51	39	50
Walmart.ca	62	41	33	30	66	42	49	54	51	44	35	43
Metro.ca	38	24	10	31	49	15	31	38	21	18	8	-4
Instacart	35	56	33	32	53	41	53	51	38	42	26	34
Voila.ca	66	30	20	46	47	40	51	53	58	16	-37	26
GroceryGateway.com	-1	36	27	9	13	23	14	7	10	4	7	17
IGA.net	-15	28	10	5	0	16	2	-7	1	8	3	10

Attribute Ratings | Quebec

NET SCORE = % 9-10 ratings minus % 0-6 ratings



Rank 1st



Rank 2nd



Rank 3rd

	Easy to pick up order	User friendly app/site	Availability of items	Fresh food quality	Payment options	Keeping you updated	Order available/delivered quickly	Cleanliness and hygiene	Order accuracy	Return policy	Price online vs. in-person	Secured transaction
Amazon	63	73	61	56	70	67	66	64	69	70	63	61
Costco.ca	44	68	55	42	54	57	45	52	43	45	50	55
PCExpress.ca	62	37	22	27	66	39	54	62	47	55	49	44
Walmart.ca	60	57	48	42	72	57	71	72	66	63	51	54
Metro.ca	63	57	52	64	64	70	61	66	67	79	37	64
IGA.net	24	20	24	17	29	29	28	31	24	33	19	28

Attribute Ratings | Atlantic

NET SCORE = % 9-10 ratings minus % 0-6 ratings



Rank 1st



Rank 2nd



Rank 3rd

	Easy to pick up order	User friendly app/site	Availability of items	Fresh food quality	Payment options	Keeping you updated	Order available/delivered quickly	Cleanliness and hygiene	Order accuracy	Return policy	Price online vs. in-person	Secured transaction
Amazon	57	67	59	50	79	50	56	70	73	63	55	64
Costco.ca	62	68	62	54	66	61	55	50	65	67	65	67
PCExpress.ca	84	77	63	72	87	77	82	87	73	75	72	73
Walmart.ca	67	54	25	34	72	36	50	64	54	38	36	35

Annual Subscription

eCommerce Grocery CX Tracker Annual Subscription

Subscribe now to receive this report in an interactive dashboard with filters for demographic, retailer, provincial, gender and more!

Prefer raw data? We can do that too!

Monthly
Reports
\$1500/Month

Quarterly
Reports
\$1000/Month

Bi-Annual
Reports
\$800/Month

Annual
Report
\$500/month

WHY CHOOSE US

- Largest and most active panel in Canada
- Get rapid insights in 72 hours
- Trusted by fortune 500 brands and major research firms
- Short and long term studies
- Rich, in depth customer data, including purchase
- Mass to specific niche audiences
- Flexible options customized to suit your brand



Get Started Now

in 4 easy steps



Identify
Business Challenge



Design
Solution



Launch
Insights Solution



Access
Insights

In as little as 72 hours



Let's talk insights.

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CEO

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Colleen Martin

Vice President | Insights Solutions

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