



# Profile of the Canadian Amazon Prime Shopper

Is Canada a Subscribe & Save Nation?



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

# Agenda

01 About Caddle®

02 Overview of Amazon in Canada

03 Profile of the Prime Member

04 Who are Subscribe & Save Consumers?

05 Profile of the Outsiders (Non Subscribers)

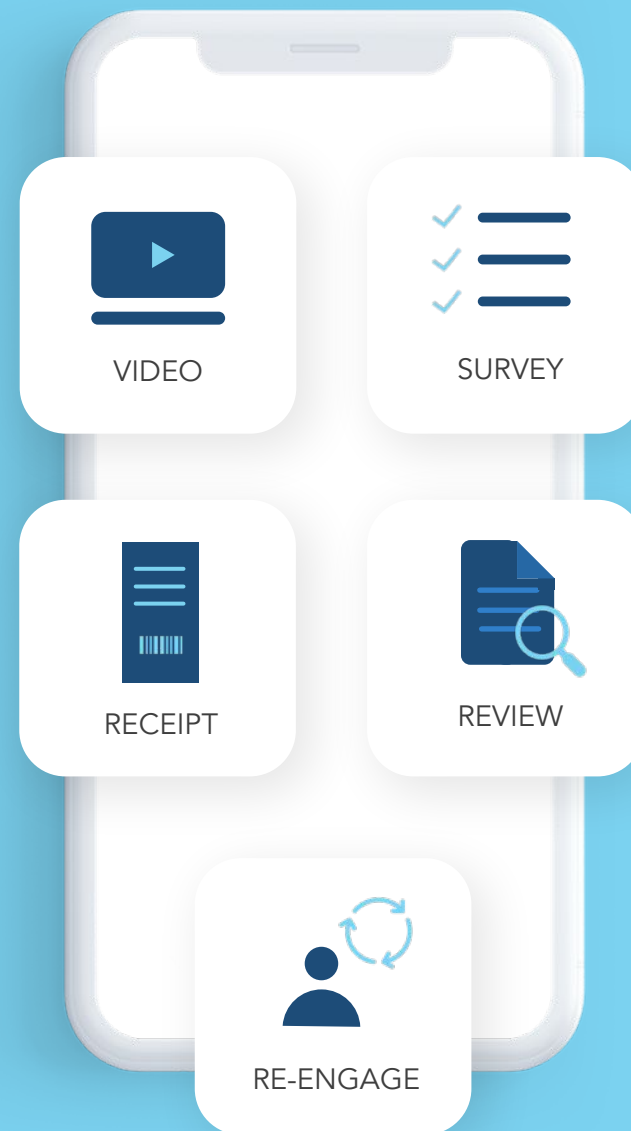
06 Future Predictions

# How It Works

Caddle® is the largest daily and monthly active panel in the Canadian market.

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
- Pop Consumers
- Environmentalists



IMAGE

# Prime-ageddon

How the Prime experience transformed consumer behaviour





If you thought Amazon was important before COVID-19....

150M+

Global Prime Members

\$3.5BN

Global revenue  
on Prime Day

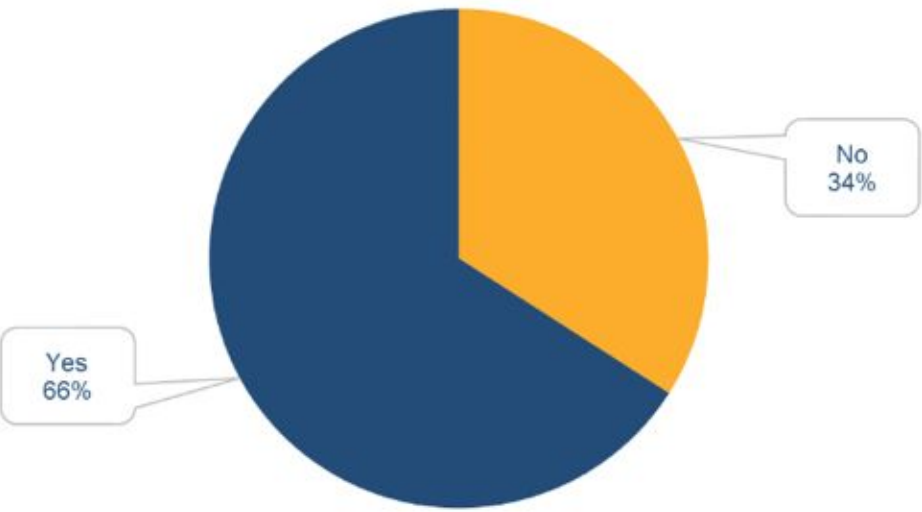
2.4M

Global Sellers

Platforms are offering access to consumers in new and interesting ways, one thing is for sure: Amazon is vital omni-channel success, now more than ever.

# Rapid Success of Prime Day: From 2015 to Today

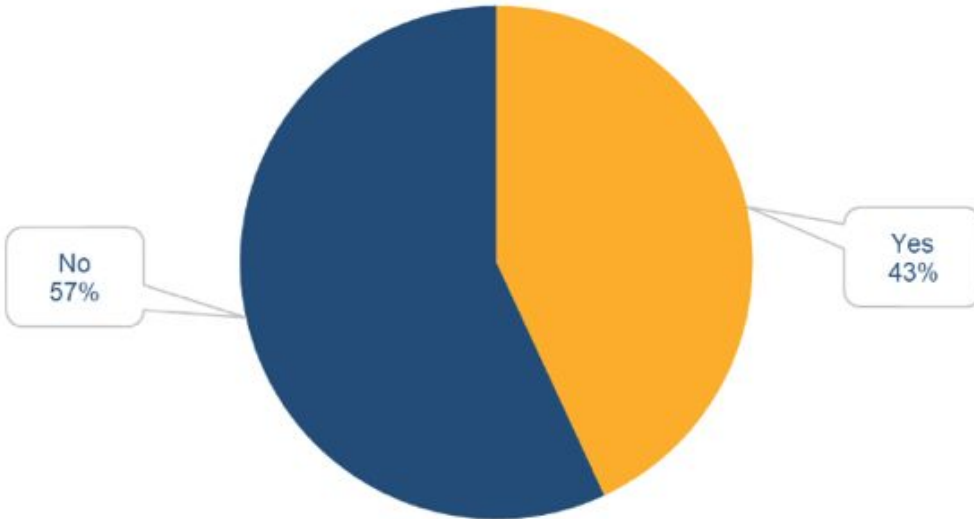
Do you know what Amazon Prime Day is?



Did you actually participate in Amazon Prime Day?



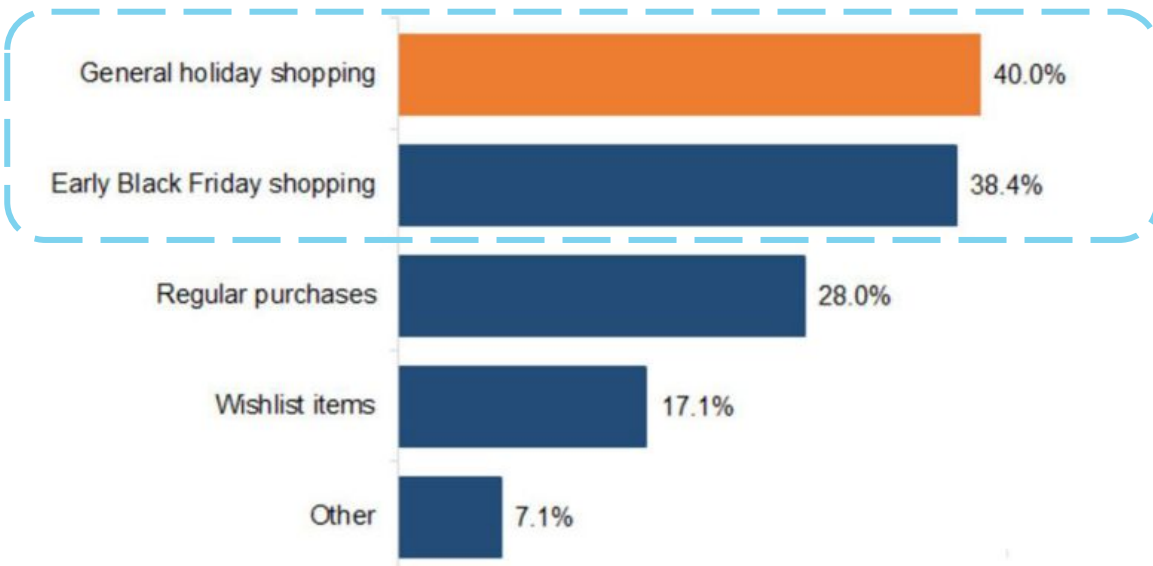
Did you plan on participating in Amazon Prime Day?





# Prime Day Stole Black Friday's Thunder

If you participated in Amazon Prime Day, what was the reason?  
(select all)



12/20/2020  
n = 2,480



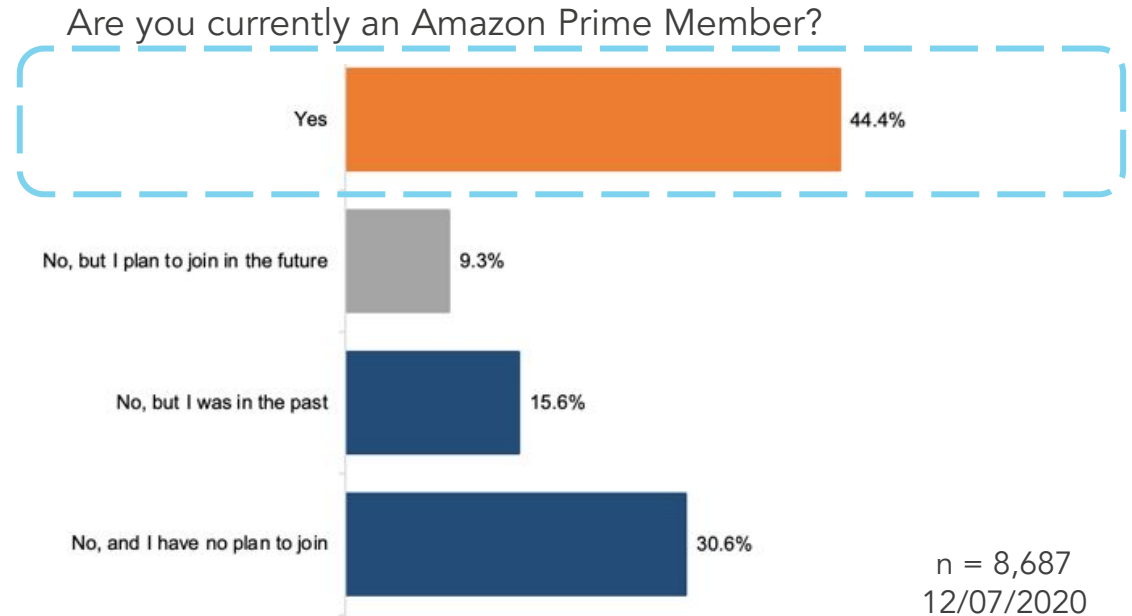


Consumer Profile

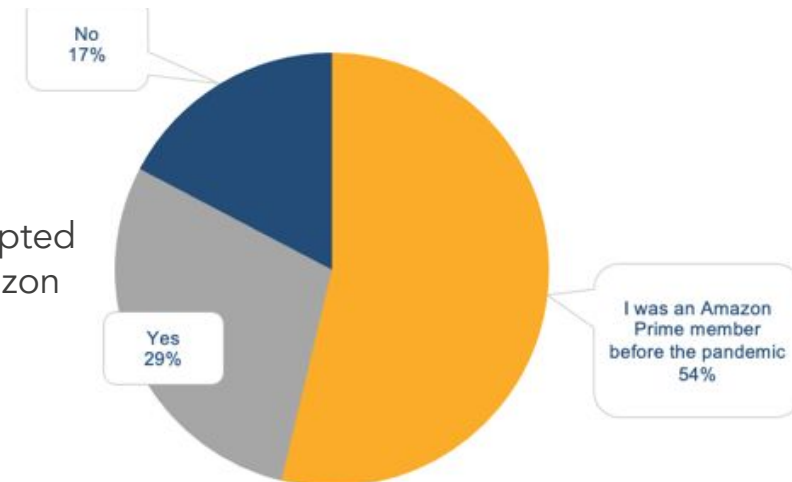
# Amazon Prime Members

# 44% of Canadians are currently Prime Members, and nearly 1 in 10 non-members plan to join

- Still 30% of consumers have no plans to join... yet
- 29% of members joined/re-joined in the past 12 months driven by COVID-19

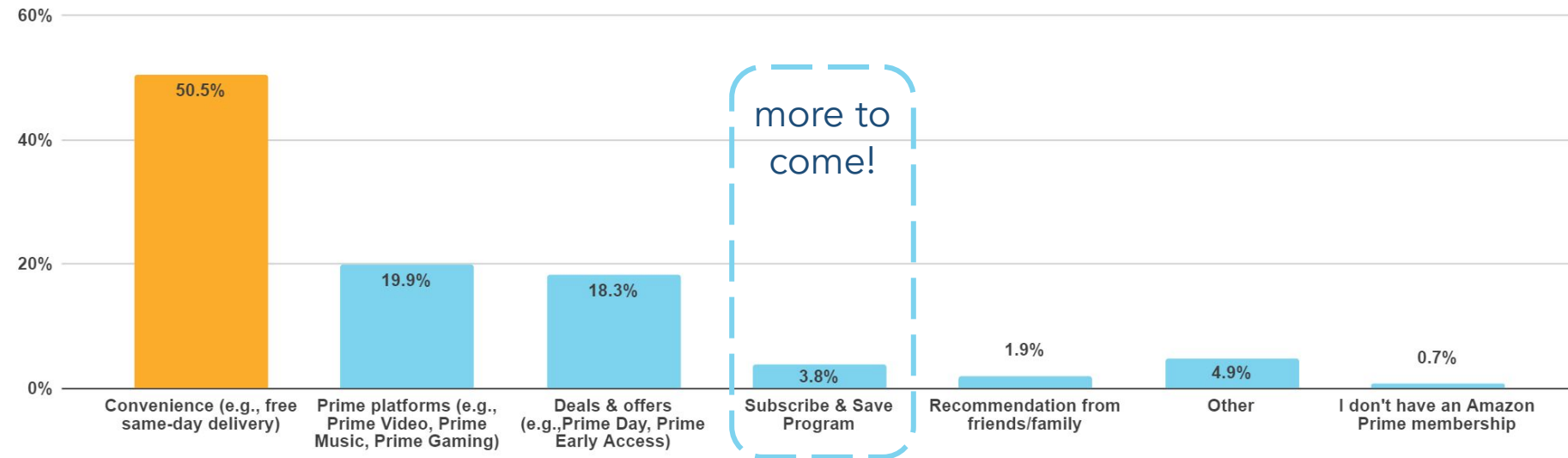


Has the pandemic prompted you to become an Amazon Prime Member?

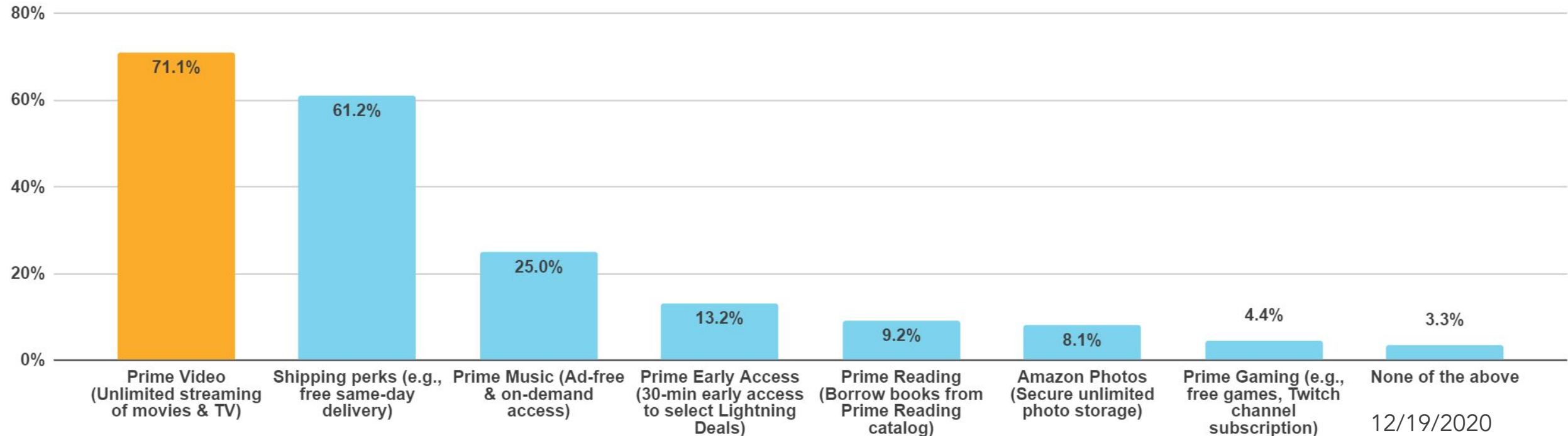


# Winning the Attention Economy

What is the main reason you have an Amazon Prime membership?



What Amazon Prime membership benefit(s) do you use? (select all)



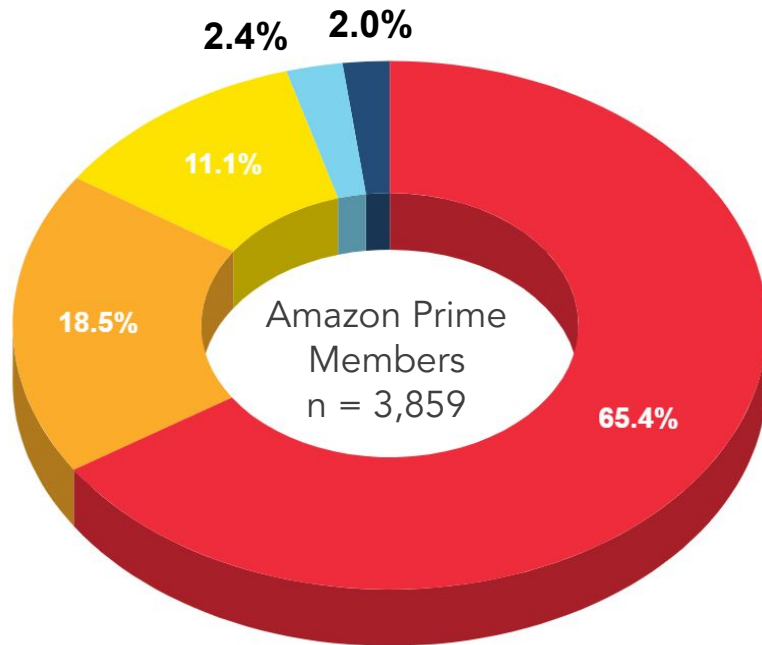
12/19/2020  
n = 8,807

# Who is Stickier?

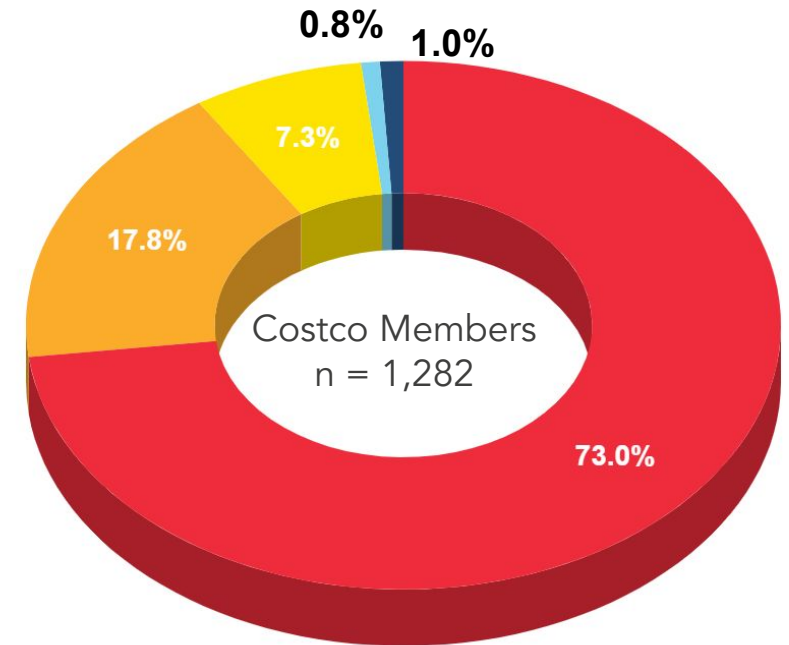


# 84% of Prime Members Committed to Renew and Costco pushing more than 90% (T2B)

How likely are you to renew your membership?



12/07/2020



03/12/2021 - 03/14/2021



# Price of Membership Leads Barriers to Join... a Barrier that Continues to be Eroded by Amazon



Non-Members  
n = 2,160

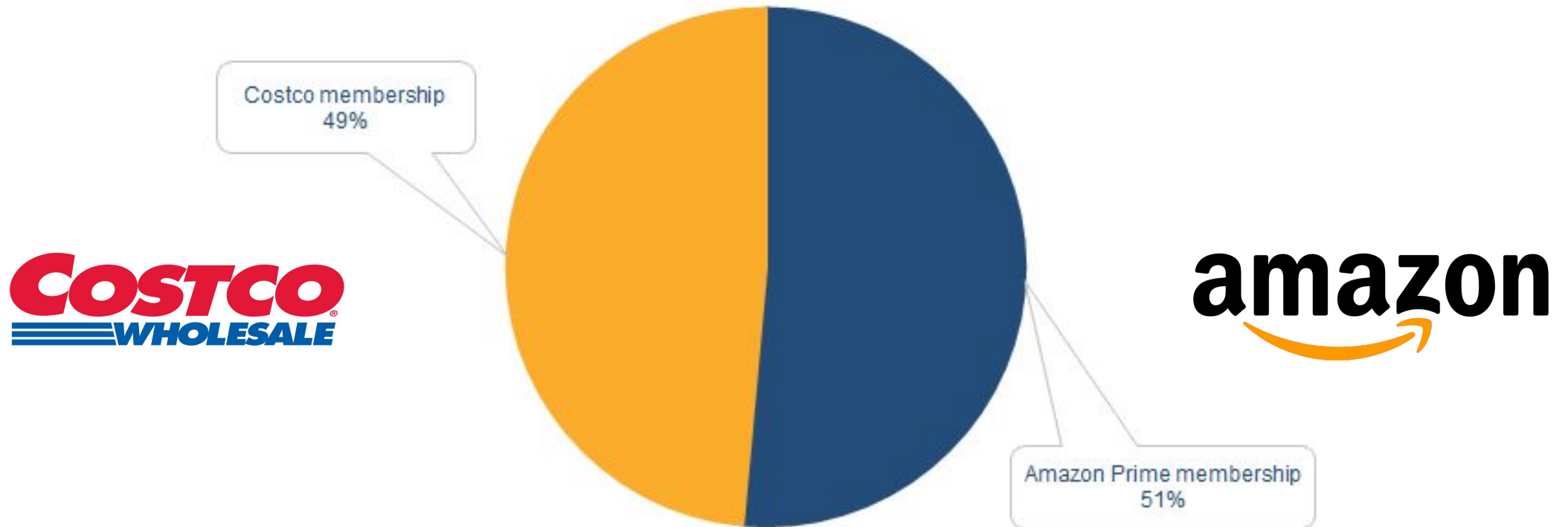
What's stopping you from joining? (Select all)



Non-Members  
n = 736



# If You Had to Choose...



Amazon Prime Members & Costco Members  
n = 553

# Key Takeaways on Amazon Consumers






1. Canadian Penetration is High & Growing | 44% of consumers are Amazon Prime Members and nearly 1 in 10 intend to join.
2. Strong Loyalty to Prime | ~85% expect to renew their Prime Membership
3. Stickier Than Costco | Amazon Prime's growing list of value-add products (Video, Music, Photos) rival Costco's stickiness.

Consumer Profile




Subscribe & Save

# Subscribe & Save Consumers: Mobile-Savvy and Shopping for Many

14% of Canadians are Amazon Subscribe & Savers

Which Devices Do They Use?		
		
32%	31%	22%
Mobile app	Desktop website	Mobile website

n = 3,132  
02/07/2021

Who Are They Shopping For?		
		
47%	34%	16%
The shopper themselves	The shopper's partner/spouse	The shopper's children

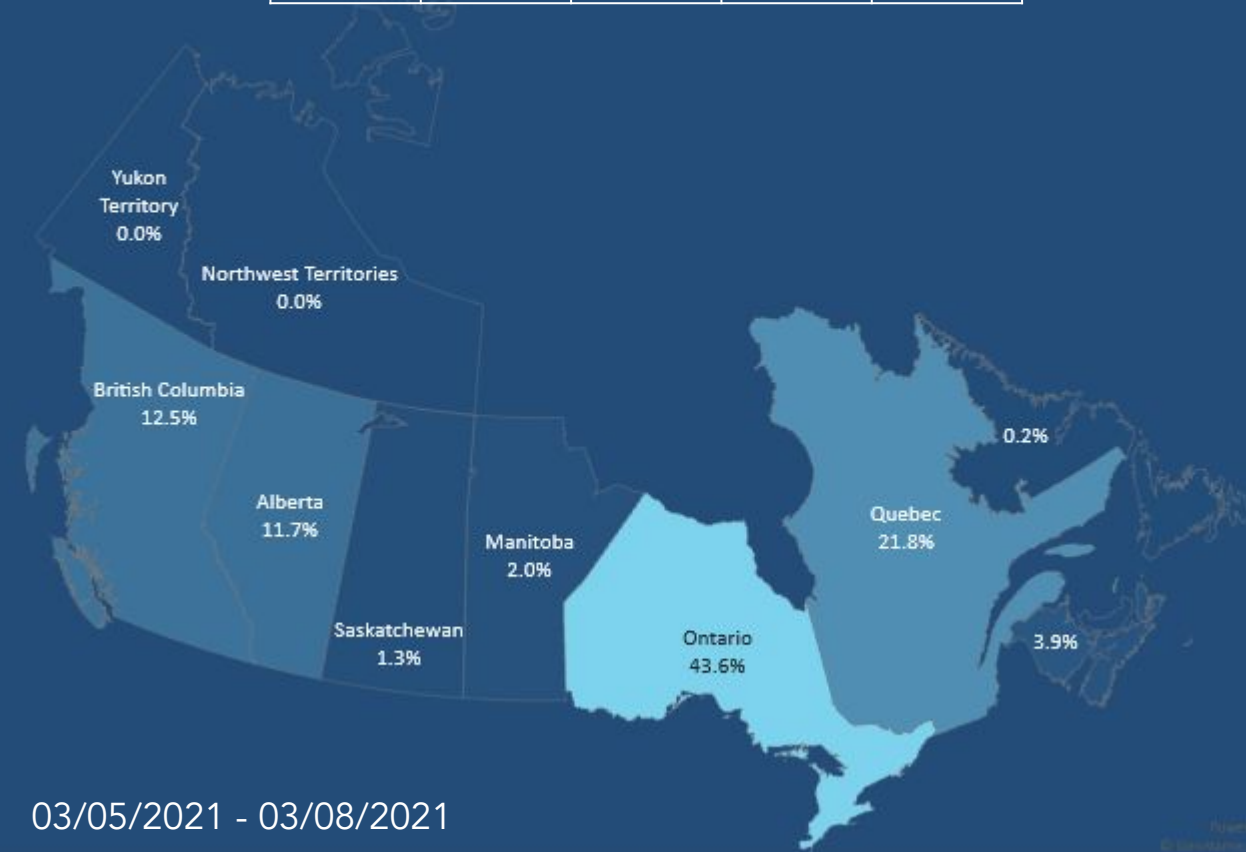
n = 3,151  
02/07/2021



# Members >12 months

## n = 131

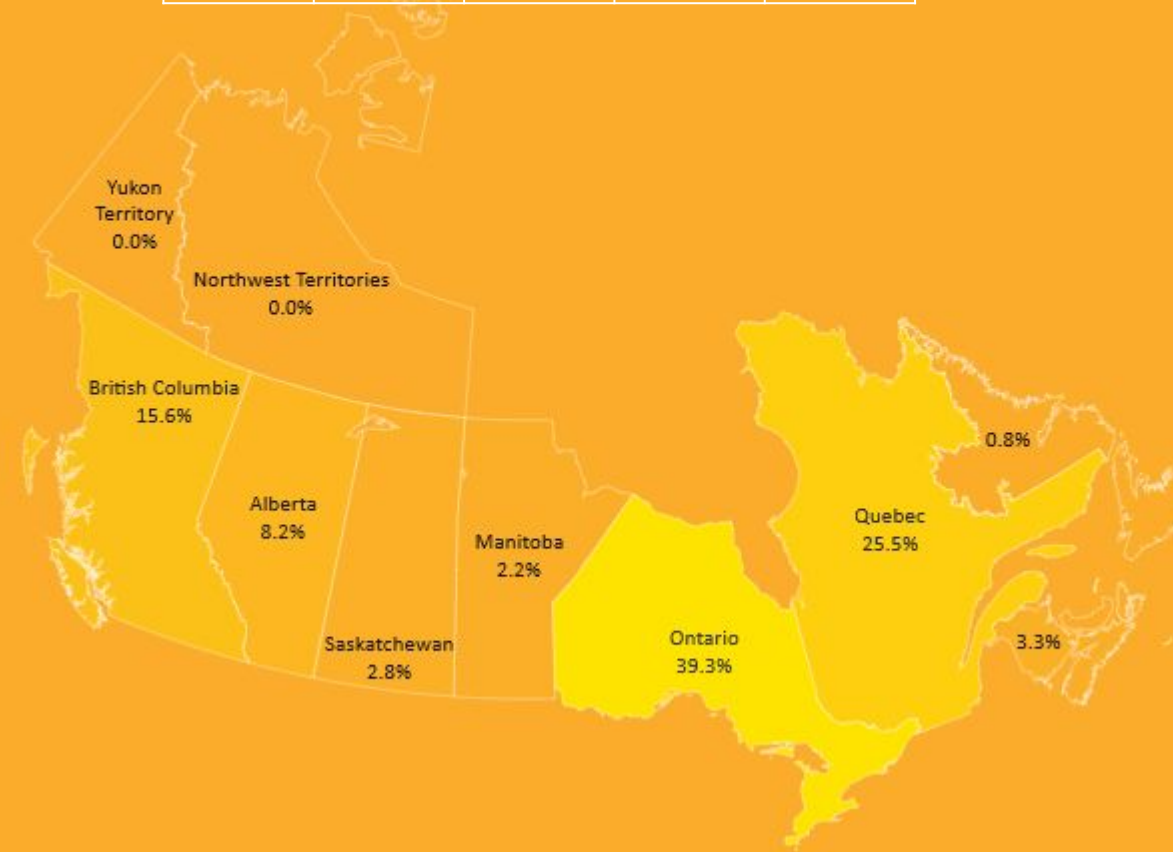
Greatest Gen	Baby Boomer	Gen X	Millennial	Gen Z
0	6	48	62	15



# Members <12 months

## n = 577

Greatest Gen	Baby Boomer	Gen X	Millennial	Gen Z
0	46	164	278	89

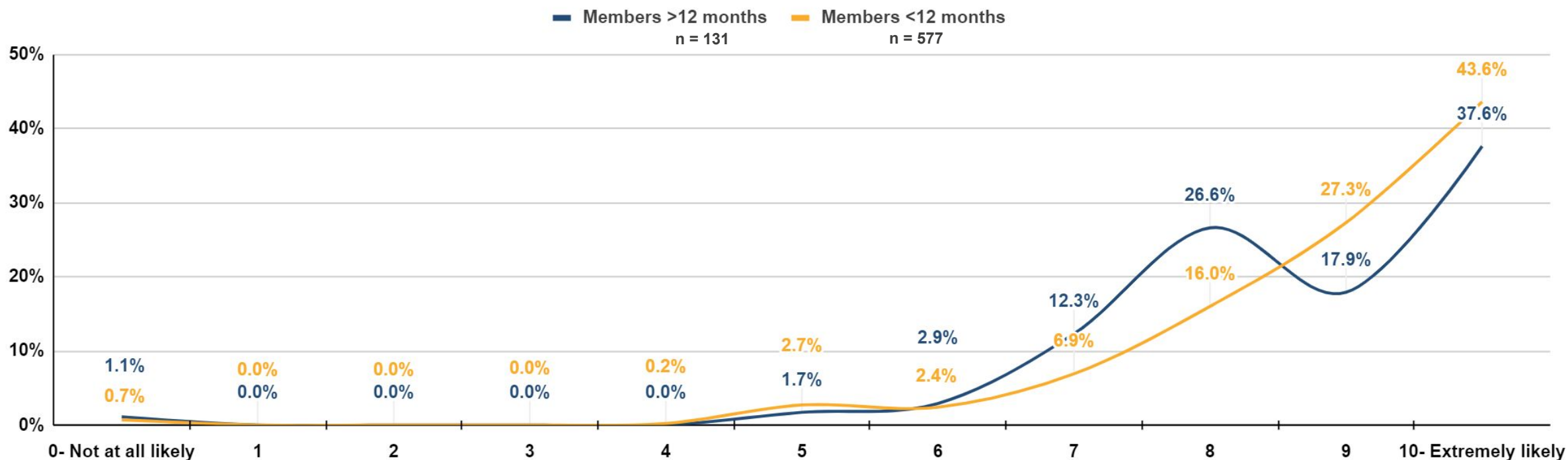


# S&S Consumers Highly Likely to Recommend

Members >12 months NPS Score: 51

Members <12 months NPS Score: 65

How likely are you to recommend Amazon's Subscribe & Save Program to a friend?



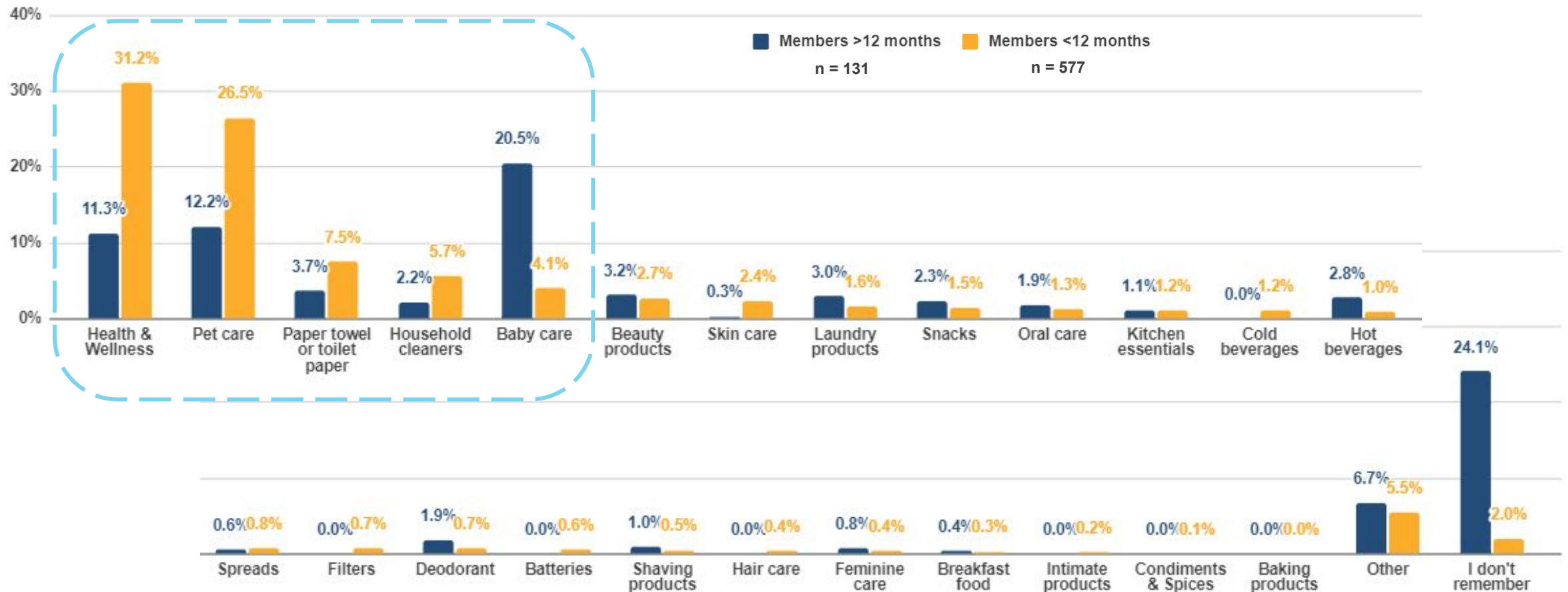
What are  
Consumers  
Subscribing  
to?





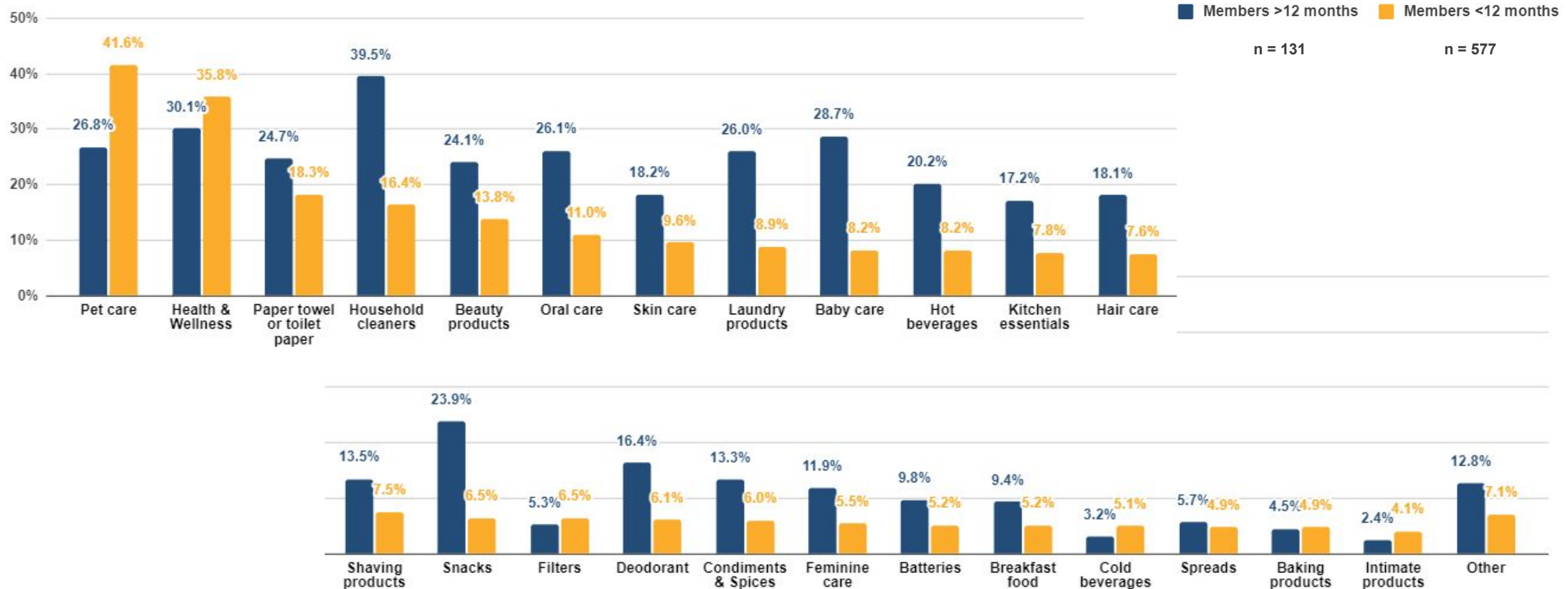
# Health & Wellness, Pet Care & Baby Care: Top Points of Entry

What was the first product you ordered using Amazon's Subscribe & Save Program?



# Subscribe & Save Cart Items

What type(s) of products do you subscribe to with Amazon's Subscribe & Save Program? (select all)

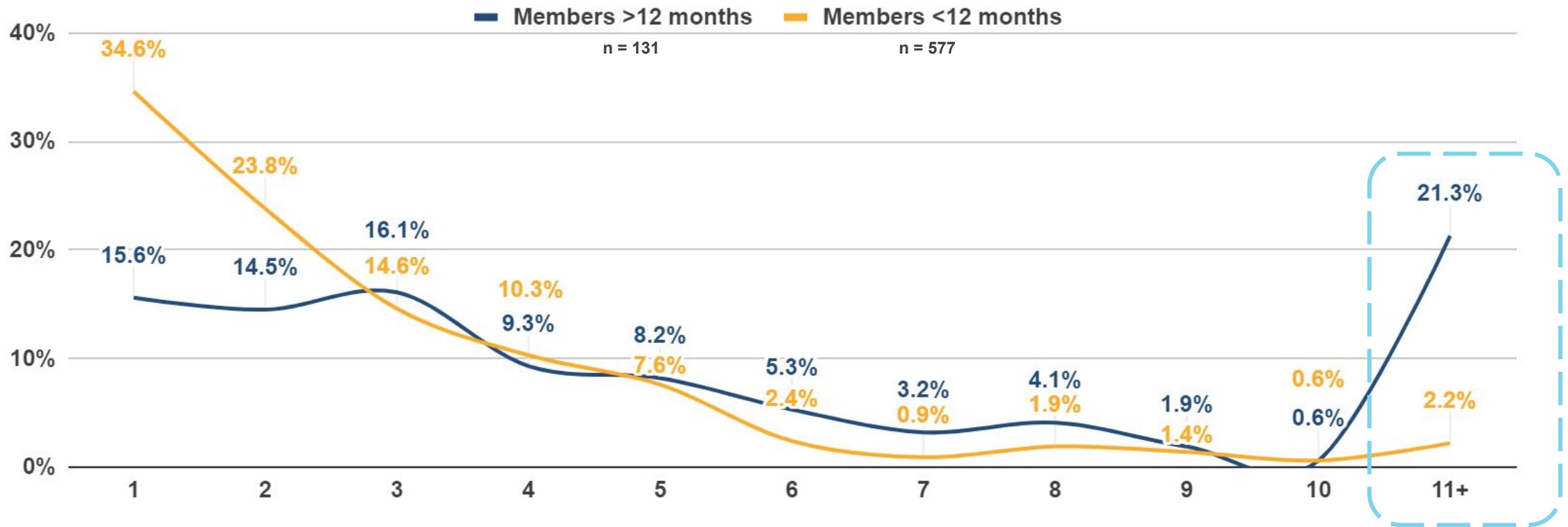




# Seasoned Subscribers Buy More

More than 1 in 5 seasoned (>12 months) S&S members subscribe to more than 10 products

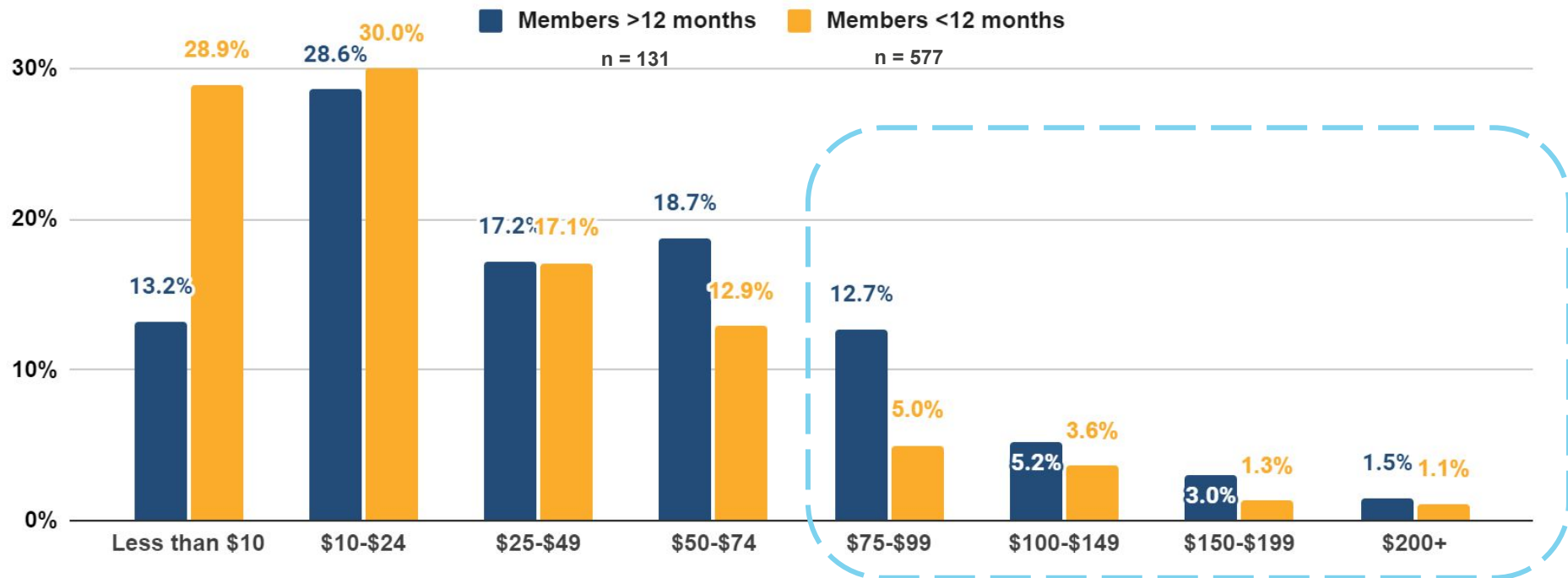
**How many different products do you subscribe to with Amazon's Subscribe & Save Program?**



# Nearly 1 in 4 Seasoned Subscribe & Save Members Spending \$900+ Annually

Whereas only 11% of fledgling members (<12 months) are doing the same

How much do you typically spend per month with Amazon's Subscribe & Save Program?

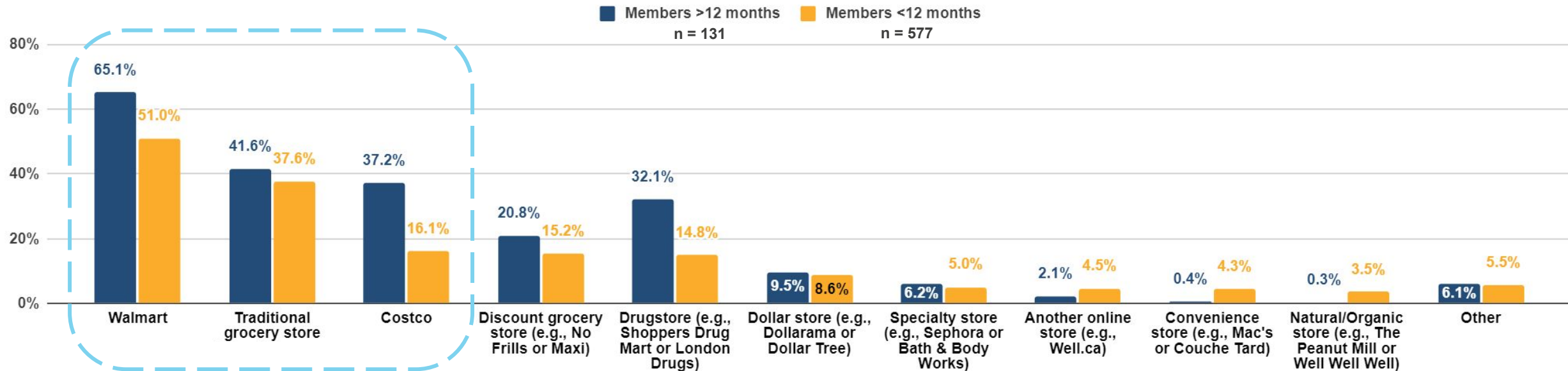


# Who is Losing Share to Amazon?



# Walmart, Traditional Grocery & Costco Impacted by Amazon Subscribe & Save Program

Where did you buy these products before you started buying them through Amazon's S&S program? (select all)

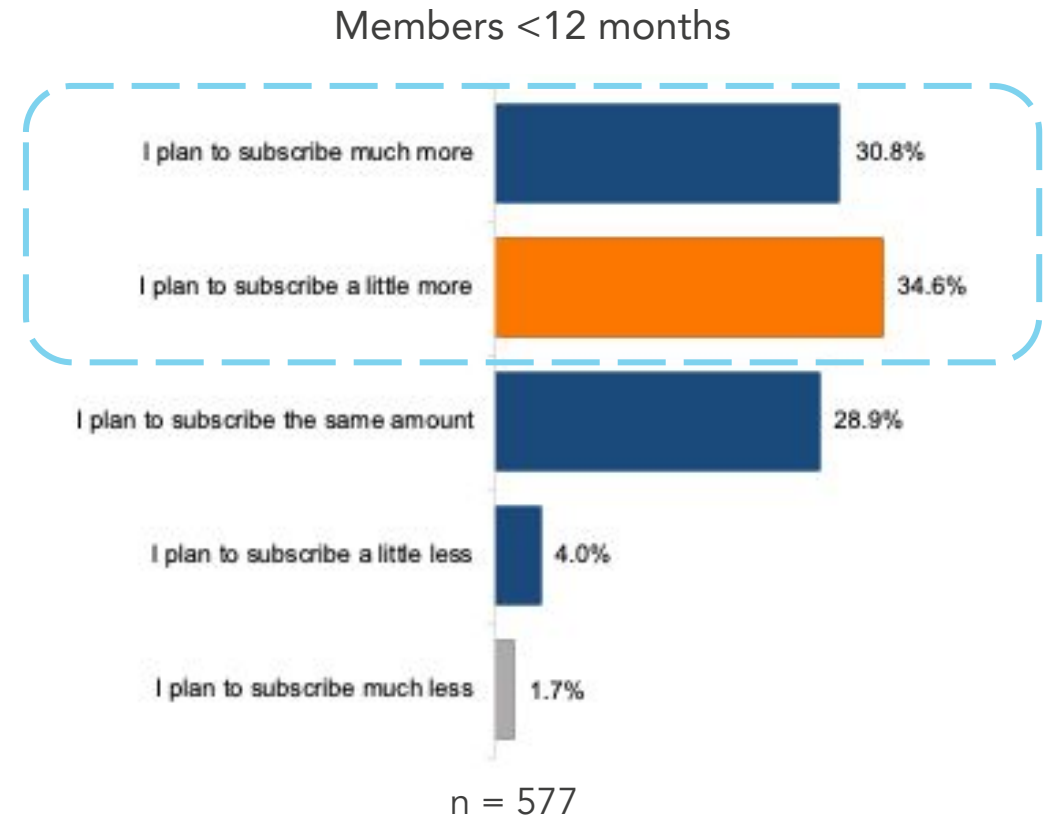
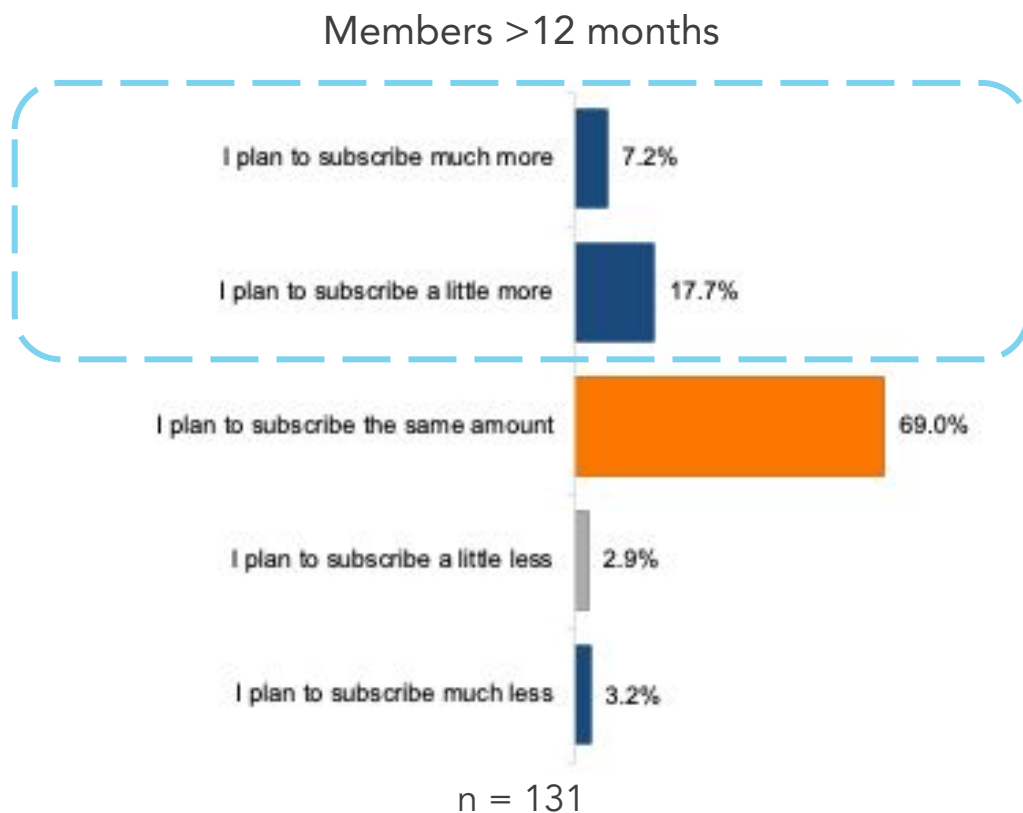




# Rapid S&S Growth on the Horizon

25% (T2B) of seasoned members and 65% (T2B) of fledgling members will S&S more post COVID-19

What impact will the end of the pandemic have on your plans to purchase with Amazon's Subscribe & Save Program?





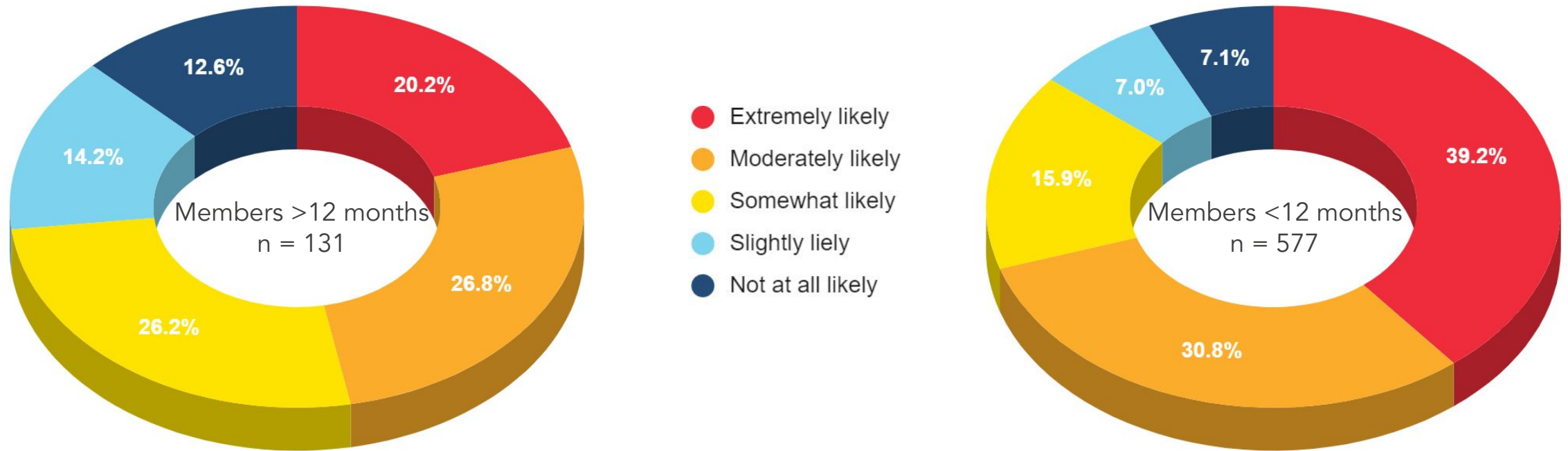
# What About Fresh Produce Subscriptions?



# S&S Consumers Hungry for Fresh Produce

New subscribers 50% more likely to subscribe to fresh produce

If Amazon's S&S Program offered fresh produce, how likely are you to subscribe?



Brands & Retailers

Future Implications



# Accelerated Retail Change & eCommerce Funding

## Snapcommerce raises \$85M to make over your mobile shopping experience

Mary Ann Azevedo @bayareawriter / 9:30 AM EST • March 4, 2021

Comment



Image Credits: ViewApart / Getty Images

People are not only shopping digitally more than ever, they're also shopping using their mobile phones more than ever.

And for mobile-first companies like Snapcommerce, this is good news.


Snapcommerce, formerly known as SnapTravel, has raised \$85 million in what the company is describing as a "Pre-IPO" growth round to help further its mission of "changing the way people shop on their phones."

BNN Bloomberg NEWS LIVE TV VIDEO SHOWS MARKET CALL MARKETS Enter symbol or company Q

COMPANY NEWS Mar 4, 2021

### Hudson's Bay overhauling website, adding third-party sellers

Brett Bundale, The Canadian Press




The Hudson's Bay Company

Hudson's Bay Co. is overhauling its website into Canada's largest shopping marketplace, adding hundreds of thousands of items to its assortment of products. The company will also be adding third-party sellers to its platform, making it a premium alternative to e-commerce like Amazon.


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Bloomberg Markets Retail...



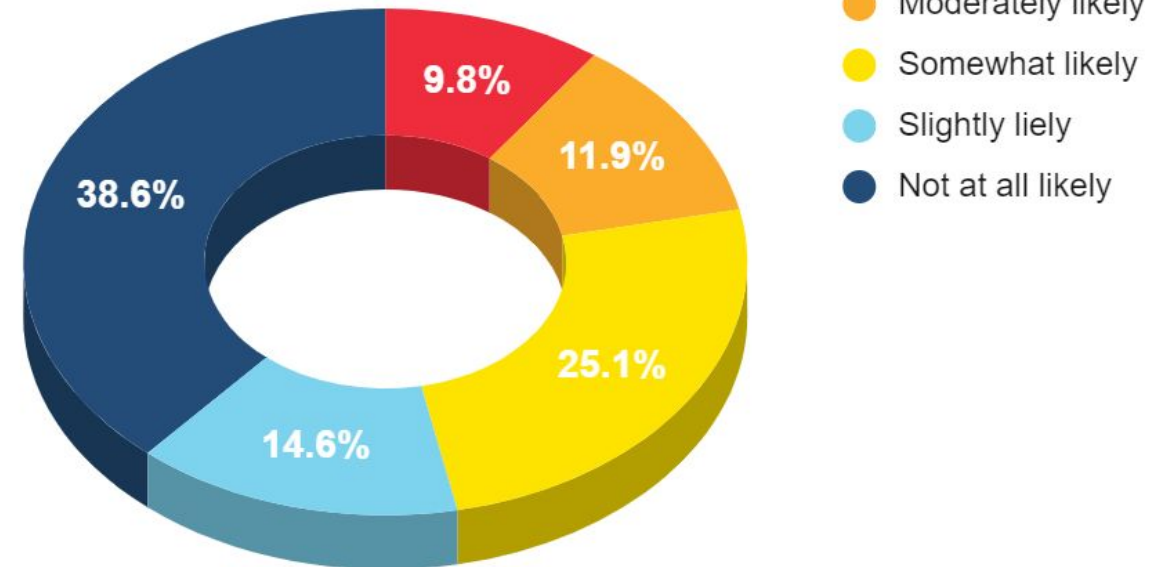
Retailers must stop selling pirate tv devices



# Gen Z Hungry for Subscription Programs

- Overall more than 1 in 5 respondents are likely to use a Subscribe & Save program other than Amazon's, with 1 in 4 on the fence
- Gen Z are almost 3X more likely than Baby Boomers to be "extremely likely"

How likely are you to use a S&S Program other than Amazon?



n = 9,403  
02/04/2021

# Key Takeaways



1. Your eCommerce Strategy is More Critical Than Ever | Prime continues to grow, but S&S is the pending tsunami
2. Prime Will Only Get Better & Stickier | More value-add products incoming
3. More Subscription Solutions are Coming | Consumers are ready for them
4. Reducing the Friction in DTC is Vital | Amazon is the model
5. KYC (Know Your Customer) | Consumer omni-channel behaviours and how COVID-19 has changed their habits



# 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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