

Report

BACK TO SCHOOL SHOPPING SURVEY

RCC RETAIL
COUNCIL
OF CANADA

CCCD CONSEIL CANADIEN
DU COMMERCE
DE DÉTAIL

ENGLISH REPORT

DATE 2020-08-20

PROJECT NUMBER 81501-114

Leger





METHODOLOGY

QUANTITATIVE RESEARCH



Web survey using computer-assisted Web interviewing (CAWI) technology.



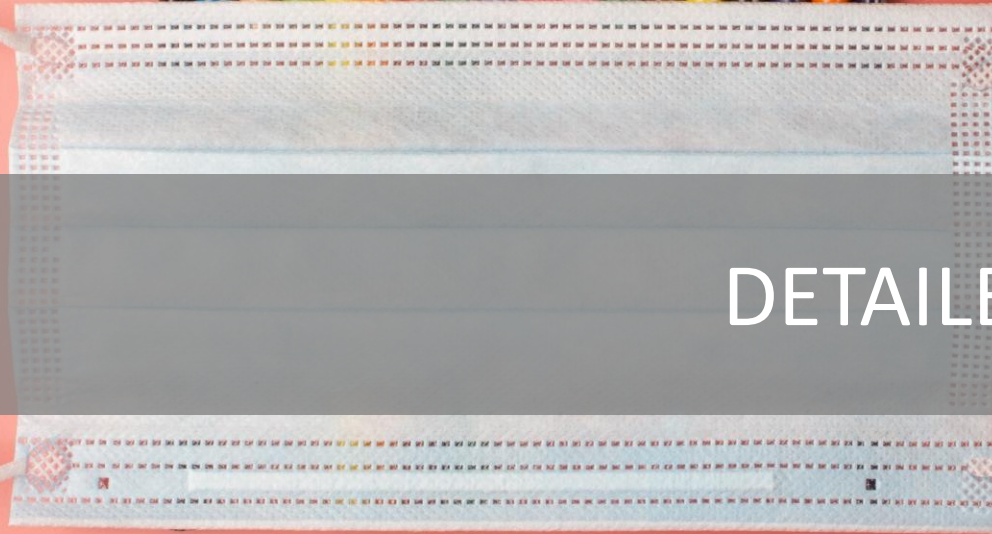
1513 Canadians were interviewed between August 7th to 9th, 2020, using Leger's online LEO panel.



Using data from the 2016 Census, results were weighted according to gender, age, mother tongue, region, education level and presence of children in the household in order to ensure a representative sample of the population.

ABOUT LEGER'S ONLINE PANEL

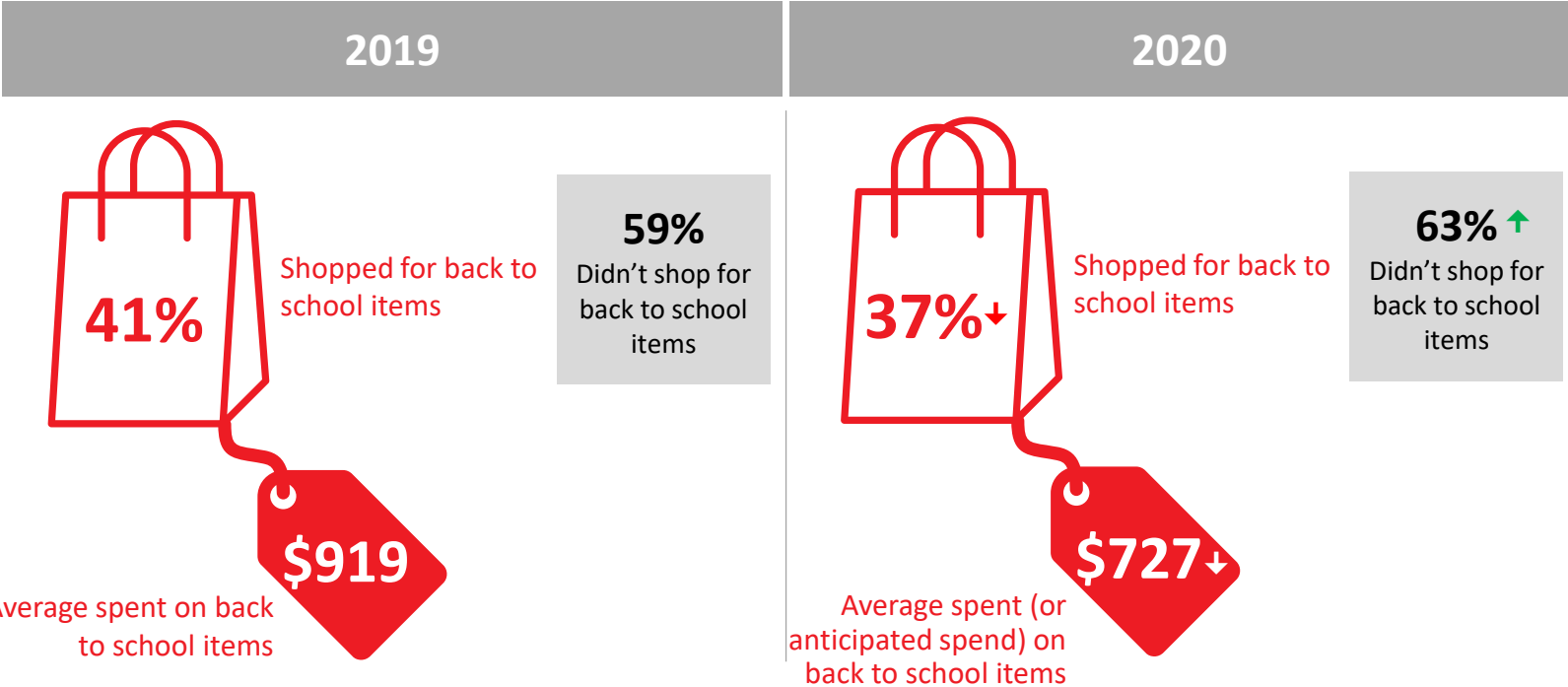
Leger's online panel has approximately 400,000 members nationally and has a retention rate of 90%.



DETAILED RESULTS

BACK TO SCHOOL (ANTICIPATED) EXPENSES

Overall, less shopping is being done for back to school this year vs. last year by Canadians. Back to school shoppers are also spending less this year.



Note: Average spends shown above are based on the people who have shopped or will shop for back to school items and doesn't include people who didn't shop for back to school items. Few noteworthy regional differences.

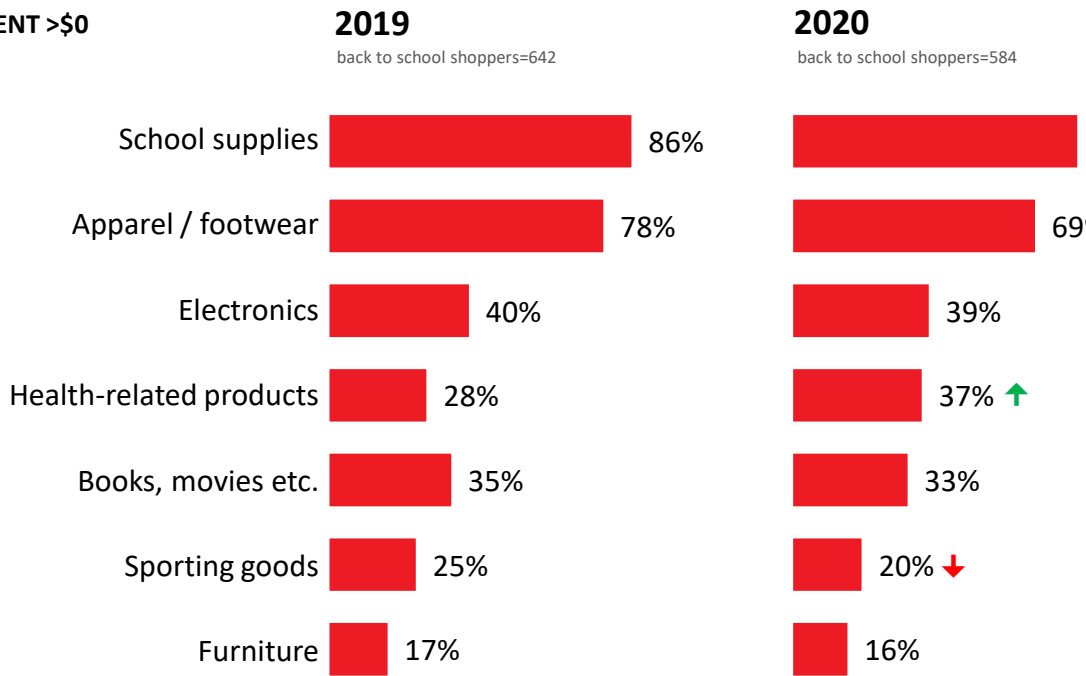
0001 Please enter your best estimate for the amount of money spent last year on back-to-school related expenses in your household. 0002 And thinking about potential back-to-school expenses for this year, what would be your best guess on how much you will spend for the same types of back-to-school products in your household? (n=1513).

↑ ↓ Significantly higher/lower than 2019

BACK TO SCHOOL (ANTICIPATED) PURCHASES

Less back to school shoppers are purchasing school supplies and apparel than last year. Health related products witness an increase in 2020.

% OF SHOPPERS WHO SPENT >\$0 IN EACH CATEGORY



REGIONAL DIFFERENCES
 In 2020, Ontario has significantly lesser purchases of school supplies, apparel, and sporting goods vs. other regions. QC, on the other hand, is purchasing more school supplies and sporting goods than other regions.

Note: % based on those who spent over \$0 on each back to school item

0001a Now, we would like to know your best estimate for the amount of money spent last year on back-to-school related expenses in each of the following categories in your household. (among back to school shoppers last year n=642). 0002a And, how much do you anticipate spending this year on back-to-school related expenses in each of the following categories in your household? (among back to school shoppers this year n=584).

↑ ↓ Significantly higher/lower than 2019

AVERAGE BACK TO SCHOOL (ANTICIPATED) SPEND



On average, with the exception of health-related products, back to school shoppers are also spending less money on school related expenses.

AVERAGE SPENDS IN EACH CATEGORY

	2019	2020	DIFFERENCE
	back to school shoppers=584	back to school shoppers=642	
School supplies	\$179	\$162	-\$17
Apparel / footwear	\$165	\$134	-\$31
Electronics	\$205	\$159	-\$46
Health-related products	\$28	\$49 ↑	\$21
Books, movies etc.	\$82	\$65	-\$17
Sporting goods	\$35	\$26	-\$17
Furniture	\$54	\$31	-\$23

Few noteworthy regional differences

Note: avg spend on other items (including tuition, rent, transportation) account for \$101 this year and \$168 last year; not shown due to low base sizes.

Note: Average spends for each item shown above are based on the people who have shopped or will shop for back to school. For those who have not shopped a particular item, spends are treated as 0\$ and is also included in the average spends.

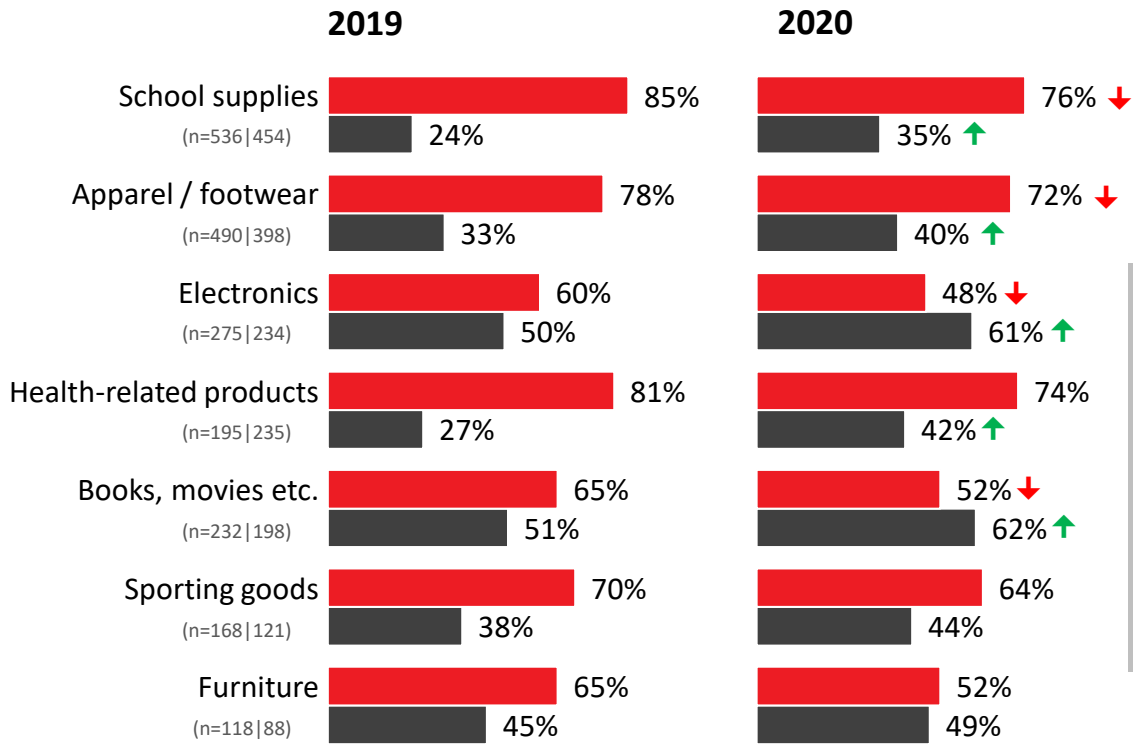
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↑ ↓ Significantly higher/lower than 2019

HOW THEY BUY BACK TO SCHOOL ITEMS

Back to school shoppers are buying more online this year versus last year. Although in-store remains the more popular method to shop for back to school items, more are turning to online for apparel and footwear, electronics, school supplies and books and movies, and health related products than previously.

■ In-Store
■ Online



REGIONAL DIFFERENCES
In 2019, there were no significant regional differences for in-store shopping, but in 2020 Quebec shows significantly higher in-store shopping as in-store shopping shrinks in other regions. On the other hand, online shopping increases across regions in 2020, but the increase is lower in Quebec vs. ROC.

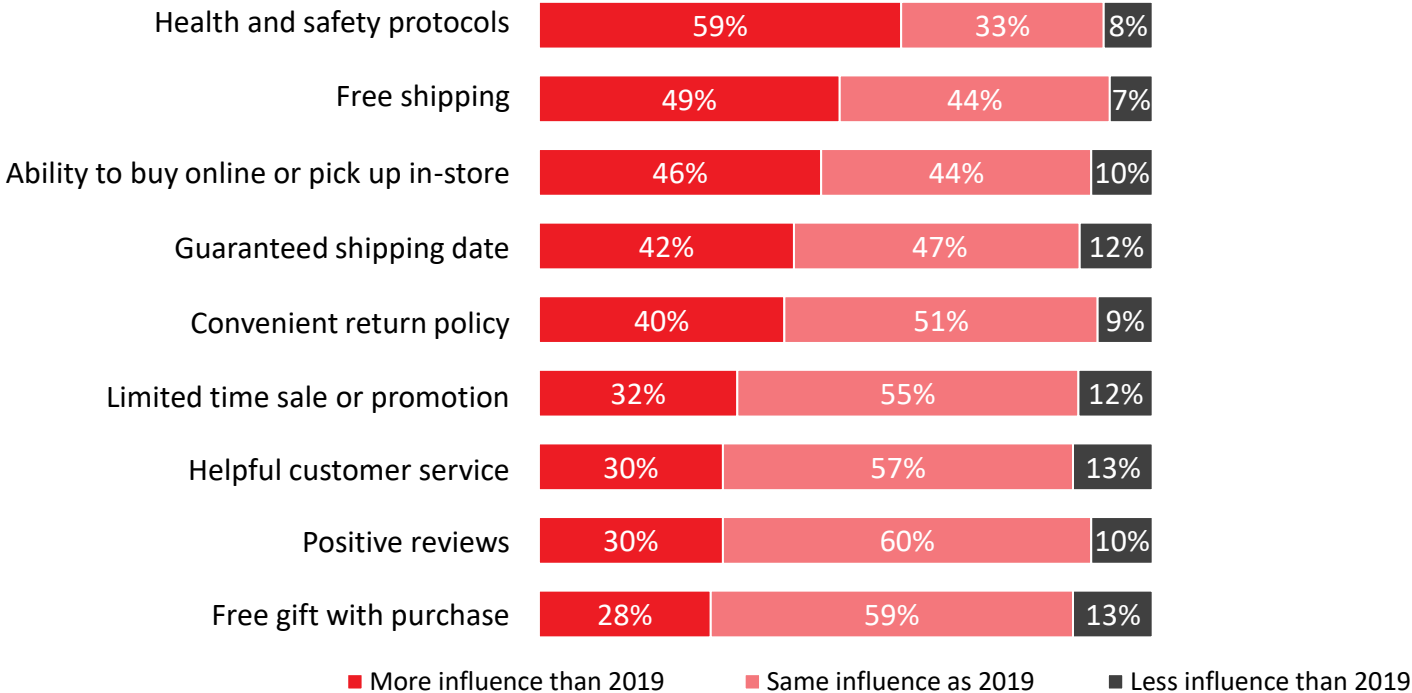
0005a For each of the products you purchased last year please tell us where each was bought 0005b For each of the products you plan to purchase this year please tell us where each will be bought

(Among back to school shoppers for each category this year | last year)

↑ ↓ Significantly higher/lower than 2019

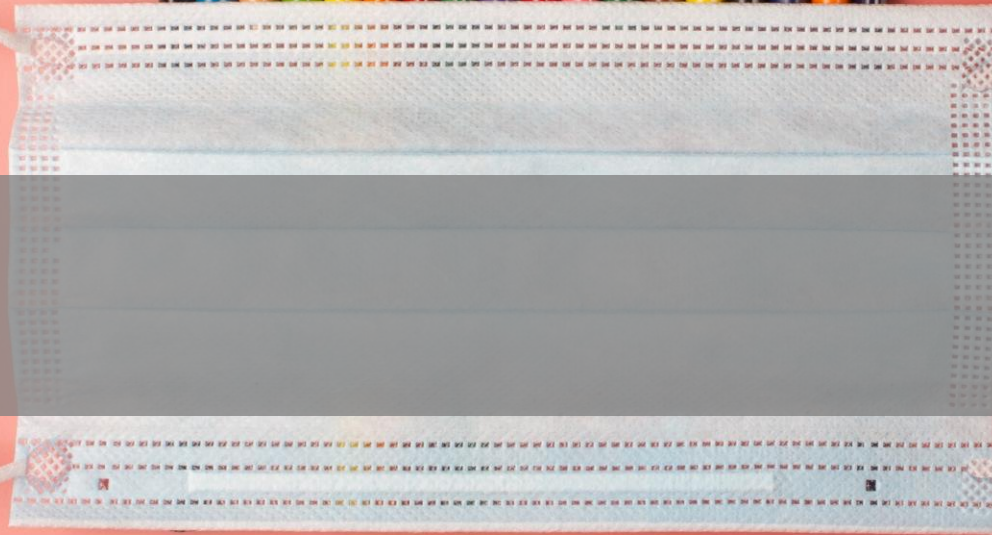
LEVEL OF INFLUENCE ON BACK TO SCHOOL SPEND

A majority say health and safety protocols are having more of an influence on their decisions where to purchase back to school items this year. About half say the influence of free shipping and ability to buy online or pick-up in-store has increased versus last year.



Few noteworthy regional differences

0005c What level of influence do the following factors have on where you purchase your back-to-school items vs. last year? (Among back to school shoppers this year=584).



APPENDIX

BACK TO SCHOOL PURCHASES

REGIONAL DIFFERENCES



% OF SHOPPERS WHO SPENT >\$0 IN EACH CATEGORY

	2019	QC	ROC	ON	ROC	EAST	WEST
	back to school shoppers=642	172	470	270		484	158
School supplies	86%	89%	85%	81%	89%	84%	90%
Apparel / footwear	78%	80%	77%	80%	76%	79%	75%
Electronics	40%	31%	43%	42%	39%	37%	48%
Health-related products	28%	31%	28%	28%	29%	30%	25%
Books, movies etc.	35%	33%	35%	39%	32%	36%	33%
Sporting goods	25%	35%	22%	23%	26%	27%	20%
Furniture	17%	16%	17%	20%	15%	19%	13%

Note: % based on those who spent over \$0 on each back to school item

Note: East includes Atlantic provinces, Quebec and Ontario; West includes Manitoba, Saskatchewan, Alberta and BC.

0002a And, how much do you anticipate spending this year on back-to-school related expenses in each of the following categories in your household? (among back to school shoppers this year n=584).

Green show significantly higher than other region

BACK TO SCHOOL PURCHASES

REGIONAL DIFFERENCES



% OF SHOPPERS WHO SPENT >\$0 IN EACH CATEGORY

	2020	QC	ROC	ON	ROC	EAST	WEST
	back to school shoppers=584	161	423	243		437	147
School supplies	81%	87%	79%	75%	85%	80%	82%
Apparel / footwear	69%	75%	67%	63%	73%	68%	70%
Electronics	39%	35%	40%	37%	41%	36%	45%
Health-related products	37%	41%	36%	36%	38%	40%	32%
Books, movies etc.	33%	32%	34%	33%	34%	33%	35%
Sporting goods	20%	28%	17%	15%	23%	20%	19%
Furniture	16%	15%	16%	16%	15%	16%	15%

Note: % based on those who spent over \$0 on each back to school item

Note: East includes Atlantic provinces, Quebec and Ontario; West includes Manitoba, Saskatchewan, Alberta and BC.

0002a And, how much do you anticipate spending this year on back-to-school related expenses in each of the following categories in your household? (among back to school shoppers this year n=584).

Green show significantly higher than other region

BACK TO SCHOOL PURCHASES IN-STORE

REGIONAL DIFFERENCES

Quebeckers were more likely to buy back-to-school sporting goods online vs those in the rest of Canada last year. This year, Quebeckers are more likely to buy school supplies, clothing, health-related products, books and movies and sporting goods in-store vs rest of Canada.

		QC	ROC	ON	ROC	EAST	WEST	
2019	School supplies	85%	89%	83%	83%	86%	85%	84%
	Apparel / footwear	78%	82%	77%	76%	79%	77%	79%
	Electronics	60%	66%	59%	58%	61%	61%	58%
	Health-related products	81%	87%	79%	78%	83%	81%	79%
	Books, movies etc.	65%	76%	62%	63%	67%	66%	64%
	Sporting goods	70%	87%	62%	62%	75%	72%	64%
	Furniture	65%	*69%	64%	64%	66%	65%	*66%
2020	School supplies	76%	86%	73%	69%	81%	77%	74%
	Apparel / footwear	72%	80%	69%	72%	72%	75%	65%
	Electronics	48%	58%	45%	45%	49%	50%	43%
	Health-related products	74%	85%	70%	74%	74%	78%	62%
	Books, movies etc.	52%	66%	47%	52%	51%	57%	39%
	Sporting goods	64%	86%	53%	51%	70%	67%	57%
	Furniture	52%	*83%	43%	38%	62%	52%	*54%

*CAUTION LOW BASE SIZES

0005a For each of the products you purchased last year please tell us where each was bought (Among back to school shoppers for each category this year | last year)

Green show significantly higher than other region

BACK TO SCHOOL PURCHASES ONLINE

REGIONAL DIFFERENCES



Quebeckers were less likely to purchase school supplies, health-related products, books and movies, and sporting goods online last year vs. the rest of Canada. Ontarians are more likely to purchase school supplies online this year vs the rest of Canada. While Quebeckers are less likely to purchase online for a number of back to school categories.

		QC	ROC	ON	ROC	EAST	WEST
2019	School supplies	14%	27%	25%	23%	21%	29%
	Apparel / footwear	28%	35%	35%	32%	32%	36%
	Electronics	41%	52%	52%	49%	49%	53%
	Health-related products	14%	31%	35%	22%	26%	29%
	Books, movies etc.	34%	56%	52%	49%	48%	57%
	Sporting goods	20%	47%	45%	34%	36%	45%
	Furniture	37%	48%	47%	44%	45%	49%
2020	School supplies	19%	40%	42%	30%	32%	42%
	Apparel / footwear	33%	43%	43%	39%	39%	43%
	Electronics	48%	64%	63%	59%	59%	64%
	Health-related products	22%	50%	47%	39%	38%	55%
	Books, movies etc.	47%	67%	64%	61%	58%	71%
	Sporting goods	26%	54%	56%	39%	43%	47%
	Furniture	*20%	58%	63%	39%	50%	*46%

*CAUTION LOW BASE SIZES

0005a For each of the products you purchased last year please tell us where each was bought (Among back to school shoppers for each category this year | last year)

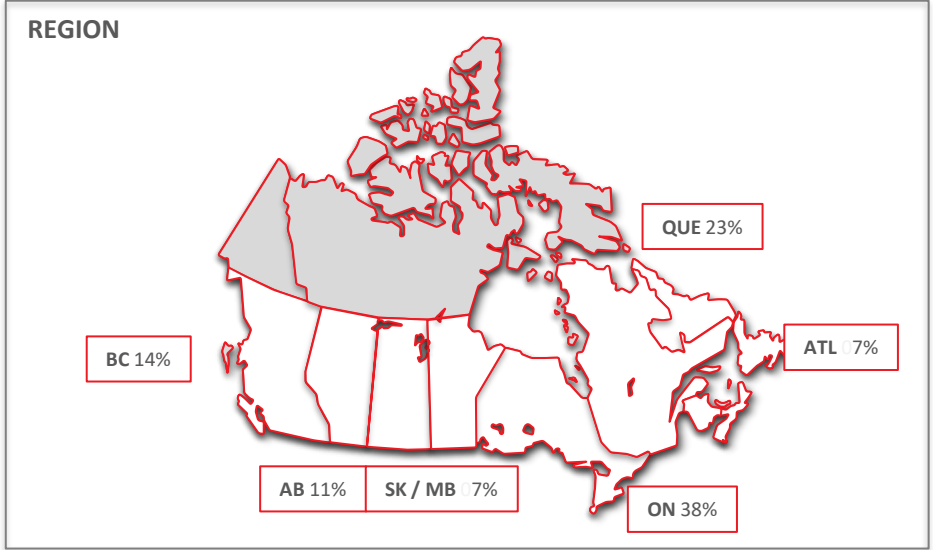
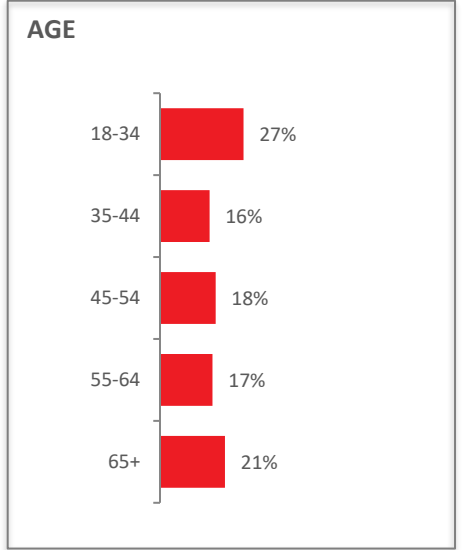
Green show significantly higher than other region



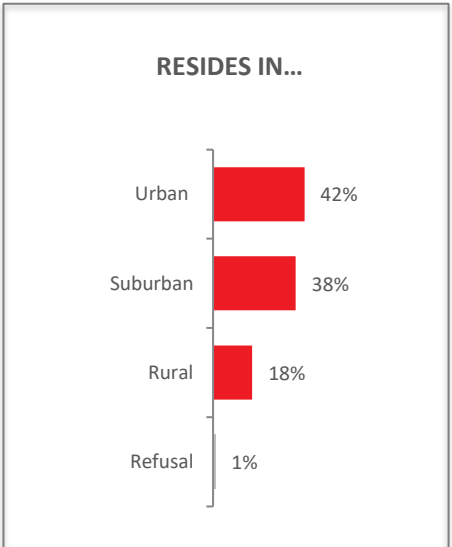
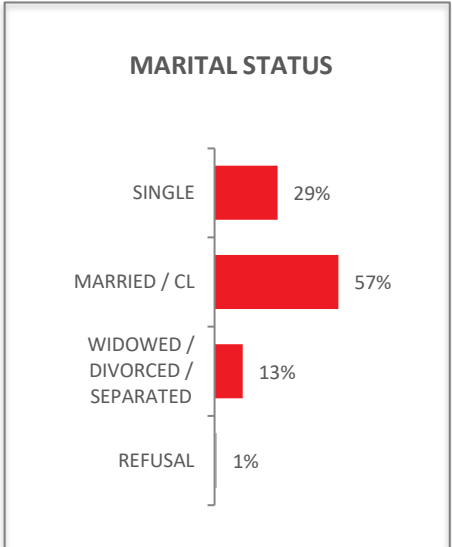
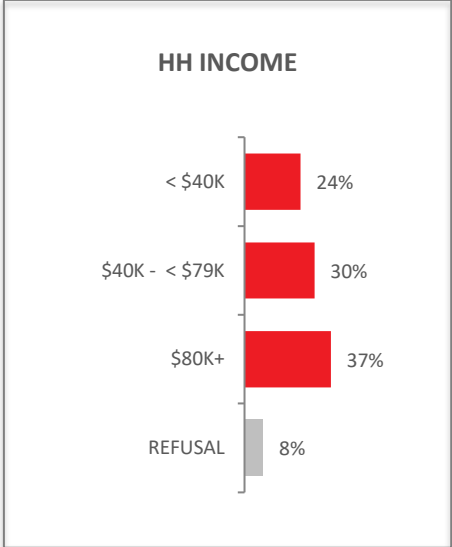
RESPONDENT DETAILS

RESPONDENT PROFILE

Base: 1513



Base: 1513



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