

Report

Canadian Black Friday/ Holiday Survey 2021

Supply Chain Issues Impacting Black Friday
and Holiday Shopping



DATE December 2021



Table of Contents

— KEY FINDINGS	Page 03
— DETAILED RESULTS	Page 07
— APPENDIX	Page 14

Methodology



Online surveys with Canadians were conducted via Leger's online panel, LEO.



From December 3rd to December 6th, 2021.



1547 residents of Canada that are 18 years of age or older.



Using data from the 2016 Census, results were weighted according to, age, gender, and region in order to ensure a representative sample of the population in Canada.



No margin of error can be associated with a non-probability sample. However, for comparative purposes, a probability sample of 1547 respondents would have a margin of error of $\pm 2.5\%$, 19 times out of 20.



Key Findings

Key findings – Black Friday Shopping Engagement



Actual reported shopping behaviour continues the ongoing shift toward online purchasing at the expense of in-store

- Fewer Canadians reported visiting a shopping mall or larger stores and significantly more shoppers said they spent money at online Canadian stores or other online marketplaces.
- Although Canadians have said in previous surveys that they want to support local/independent stores during the pandemic, reported behaviour has shown no significant growth.



Reported Black Friday spending overall remains stagnant; not surprisingly, the shift towards online purchases continues

- 2021 reported online spending outpaced in-store by a ratio of 2:1 compared to 2019 findings – particularly for purchase of \$100 or less.
- Price competitiveness, selection availability, convenience and ongoing challenges with store experience are likely reasons for shift to online.



Canadian shoppers express concerns over supply chain disruptions in advance of the holiday season

- Roughly half of Canadians are worried supply chain issues impacting their holiday shopping and fear that on-time online delivery for December gift giving may be at risk. A similar proportion heeded the call to begin their shopping earlier this year to avoid delivery disappointments.
- Inflationary price increases and other supply chain problems related to availability and shipping issues are real-time realities for large majorities of consumers.



Perceptions of the value of Black Friday deals, discounts and promotions are decreasing

- The proportion of Canadian shoppers reported ‘great deals’ declined from 2018 findings, nearly half reported poor to mediocre deals.
- This combined with supply chain issues, inflation, and pandemic related reluctance to charge into crowds for ‘door-crashers’ are all potential reasons for a stalled growth of Black Friday engagement.

A hand is holding a black shopping bag with gold-colored handles. The bag is prominently displayed in the upper left quadrant of the image. On the front of the bag, the words "BLACK FRIDAY" are printed in a bold, white, sans-serif font, enclosed within a thin white rectangular border. The background is a dark, solid color, and a semi-transparent grey horizontal bar spans the bottom of the image.

**BLACK
FRIDAY**

Detailed Results

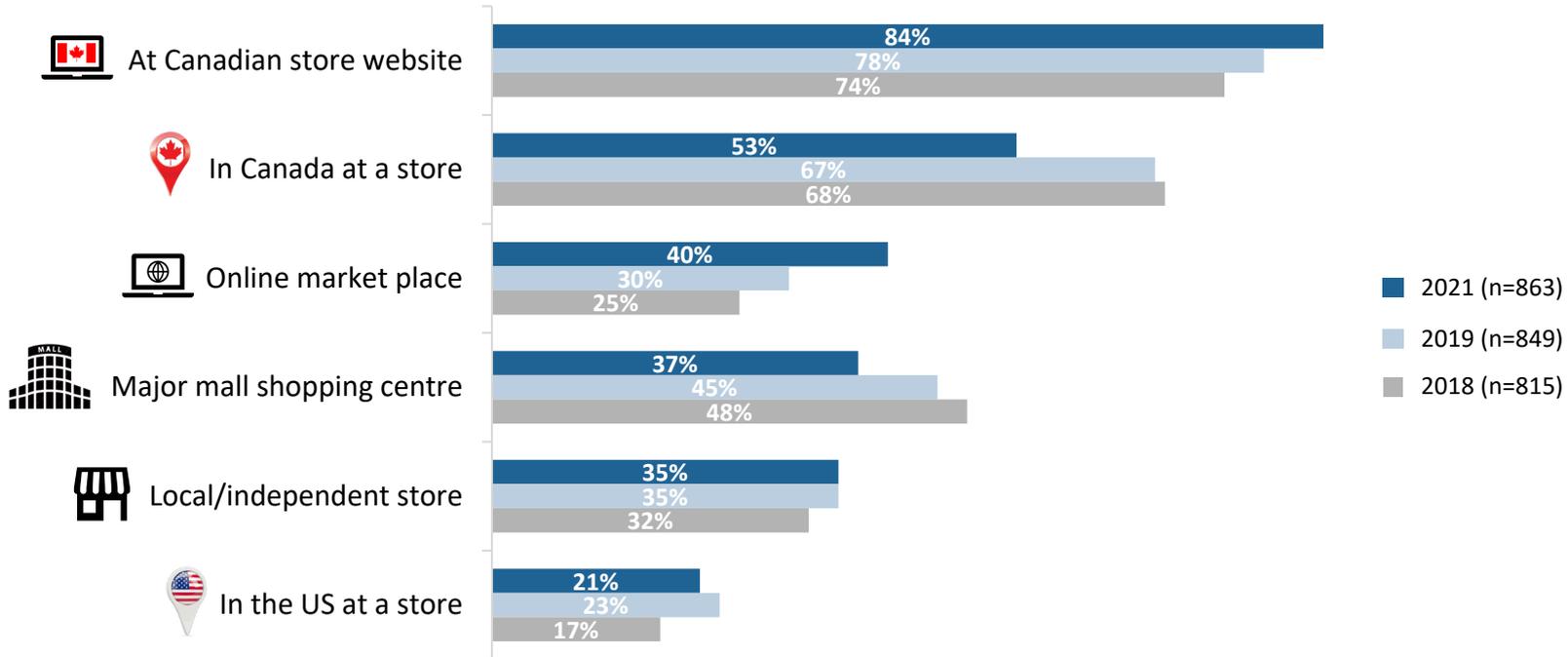
Stalled Growth of Black Friday Participation

After a drop post 2015, Black Friday promotions engagement had steadily inched upwards. A culmination of related events (i.e., pandemic, supply chain issues, inflation, etc.) seems to have put a damper on this trend. Perhaps a continued lack of excitement over deals is also a contributor.

	2021	2019	2018	2017	2016	2015	2014
<i>TOTAL SAMPLE</i>	1547	1518	1540	1,635	1,578	1,003	1,005
I bought items from Black Friday sales promotions	34%	37%	34%	31%	30%	44%	25%
I browsed Black Friday sales promotions but did not find anything I wanted to buy	20%	18%	20%	19%	18%	24%	27%
PARTICIPATED: BROWSED OR BOUGHT	54%	55%	54%	50%	48%	68%	52%
I knew about it, but did not participate in any way	44%	43%	45%	49%	51%	31%	47%
I was not aware of Black Friday promotions	2%	2%	2%	1%	1%	1%	2%
DID NOT PARTICIPATE	46%	45%	47%	50%	52%	32%	49%

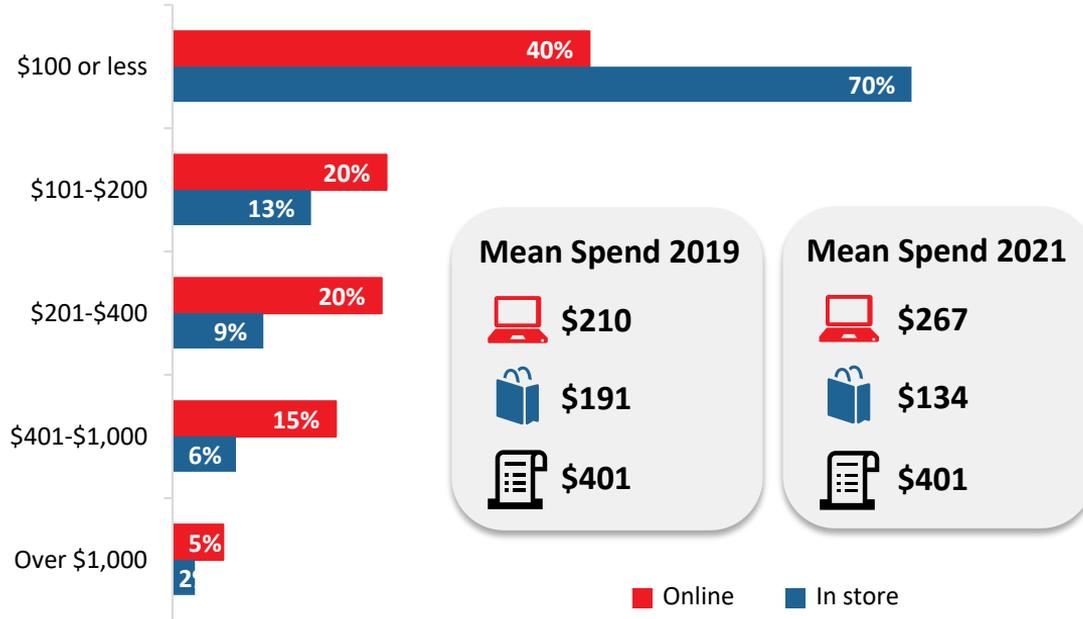
Net Bought or Browsed for Black Friday Promotions

Significant shifts from shopping malls and larger stores to online shopping with two exceptions. Local/independent store shopping has not declined – perhaps barriers presented earlier prevent growth? The percentage of Canadians who crossed the border to shop in person remained consistent with 2019 reported behaviour.



Money Spent During Black Friday Promotions

Reported 2021 overall spending identical to 2019. However, online spending outpaces in-store spending by a ratio of 2:1. This is a significant shift from 2019 when online and in-store reported spending was nearly equal.



Although shoppers 'say' they want to support local independent stores, the reality preventing more support is mainly oriented around more competitive pricing, better selection, and convenience.

TOP 3 REASONS

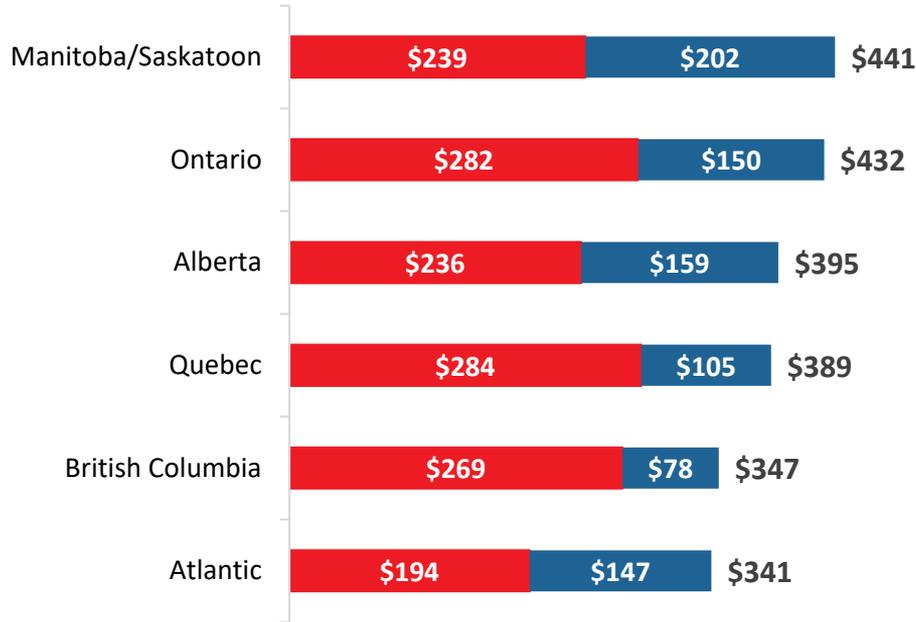


Throughout the pandemic, survey respondents have been telling us that they want to support local independent stores, what would you say are the top three reasons you DON'T shop more at local independent retailers?
 Base: (n=1,547)

What is your best estimate of the total amount of money you spent during Black Friday promotions, regardless if the purchase was November 29 or before?
 Base: (n=565)

Black Friday Participation and Spending Varies Across the Country

While participation in Black Friday purchasing is similar across the country, spending is highest in Quebec and Ontario (especially online spending) and is much lower in the Western provinces and the Maritimes. BC stands out as having the highest percentage of online spending.



Online



In store

What is your best estimate of the total amount of money you spent during Black Friday promotions, regardless if the purchase was November 29 or before?

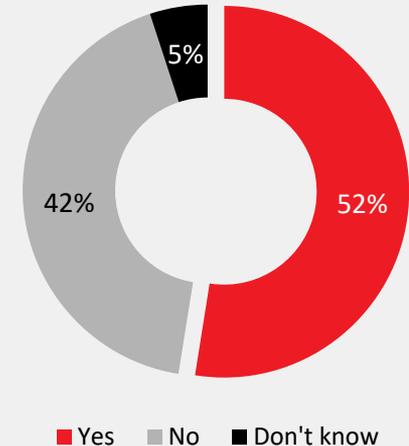
Base: (n=565)

Expressed Supply Chain Disruption Concerns

A significant number of shoppers express concerns with supply chain disruptions creating stockouts and the potential for delays in home deliveries to adversely affect on-time online orders during the holiday season. These concerns also tend to skew higher for the younger generations of shoppers, in some cases by up to 10 points.



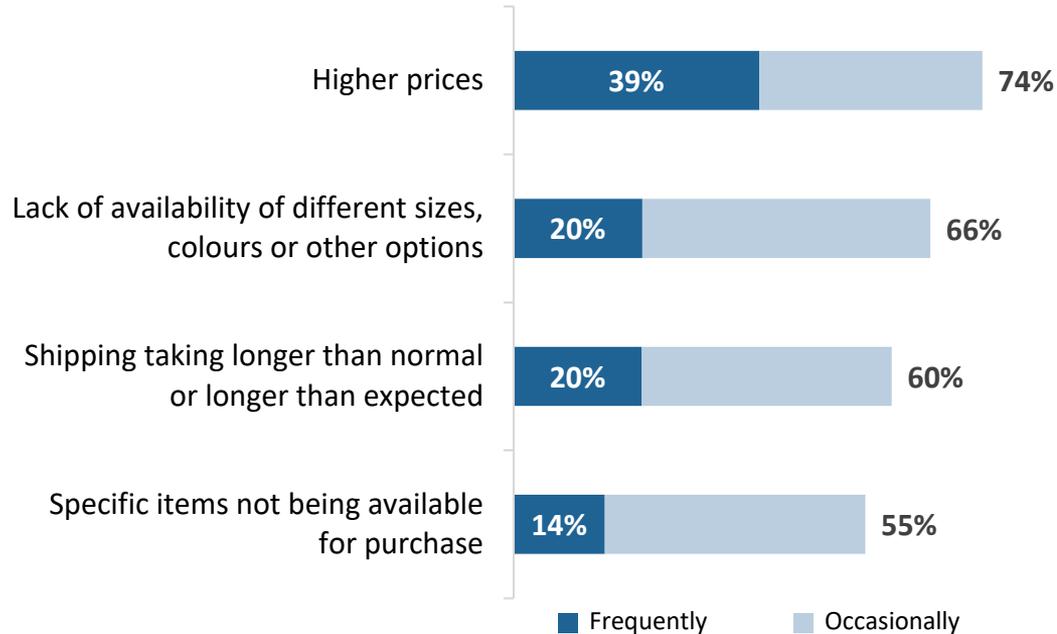
Shopping earlier this year to ensure gifts are delivered in time for the holiday season



Are you shopping earlier this year than you have in previous years to ensure your gifts are delivered in time for the holiday season?
Base: (n=781)

Overall, how concerned are you about supply chain disruptions that might impact holiday shopping?
When considering purchases online in December for gift giving, to what extent are you concerned about on-time online delivery of your order?
Base: (n=1,547)

Reality of Supply Chain Disruptions is Significant

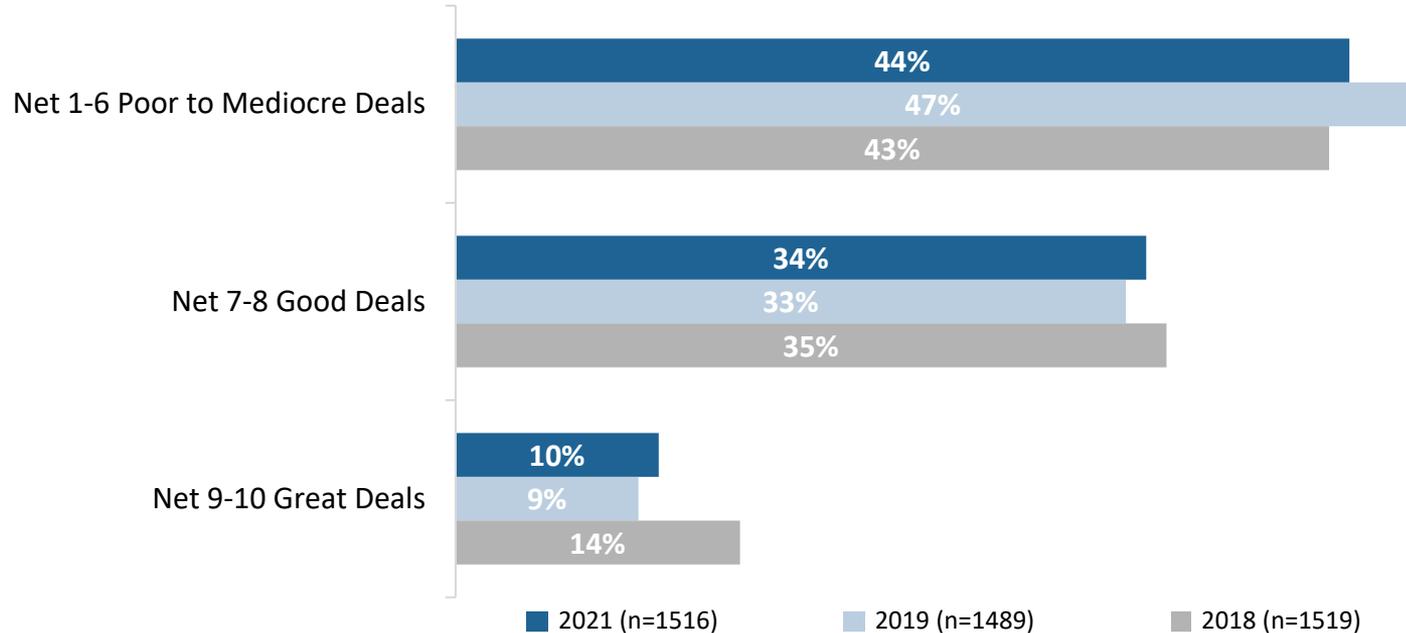


While roughly half of shoppers express concerns about supply chain disruptions, the actual negative experiences have affected large majorities of consumers, with inflation being at the top of the list. Other disruptions also affect all but skew even higher among younger shoppers.



Perceptions of Black Friday Deals, Discounts & Promotions

Shoppers report a slight decline in what they perceived to be great Black Friday deals, discounts and promotions with near majorities expressing a lack of impressive opportunities and only 10% feeling like they received excellent deals



APPENDIX

ABOUT THIS STUDY

DIG360 has been tracking the Canadian Black Friday experience and its impact on Holiday retailing since 2010. Since 2016, Leger has been a strong partner in this work.

The findings rely primarily on a web survey conducted from December 3 to December 6, 2021 with a representative sample of 1,547 Canadians who were English- or French-speaking, and 18 years of age or older. As a comparison, a probabilistic sample of 1,547 respondents yields a maximum margin of error of +/- 2.5%, 19 times out of 20.

Using data from Statistics Canada, the results were weighted according to gender, age, region, mother tongue, education and whether or not children are present in the household to ensure a sample representative of the entire population under review.

Please feel free to share insights and data from this report; however, please refer to "DIG360-Leger" if citing this information.

ABOUT LEGER



Leger is the largest Canadian-owned market research and analytics company, with more than 600 employees in eight Canadian and US offices. Leger has been working with prestigious clients since 1986, including L'Oreal, Nespresso, IKEA, Couche-Tard, Scientific Games, Pfizer, GSK, and more.

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ABOUT DIG360



DIG360 Consulting Ltd. is a Canadian retail advisory headquartered in Vancouver. With respected sector expertise and an "assisted DIY" philosophy, DIG360 helps executives create their path to evolve the businesses. They encourage customer strategies that resonate with the right target audiences, competing on better experiences and stronger relationships. **David Ian Gray** leads DIG360 and is a recognized expert on shopper and retail trends.

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We know Canadians

