



Multi-Channel Shopping: *Canadian Style*

Prepared by J.C. Williams Group
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J.C. WILLIAMS GROUP

Objectives

1. To understand the categories purchased and spend of Canadian multi-channel shoppers
2. To understand their multi-channel shopping behaviour

Methodology

- An online survey was conducted with Canadian online¹ and offline² shoppers the week of April 10, 2006
- A total of 2,000 individuals were surveyed. 1,312 were online shoppers and 688 were offline shoppers
- The data has been analyzed across different variables—the most significant of which are Frequency and Shopper Type

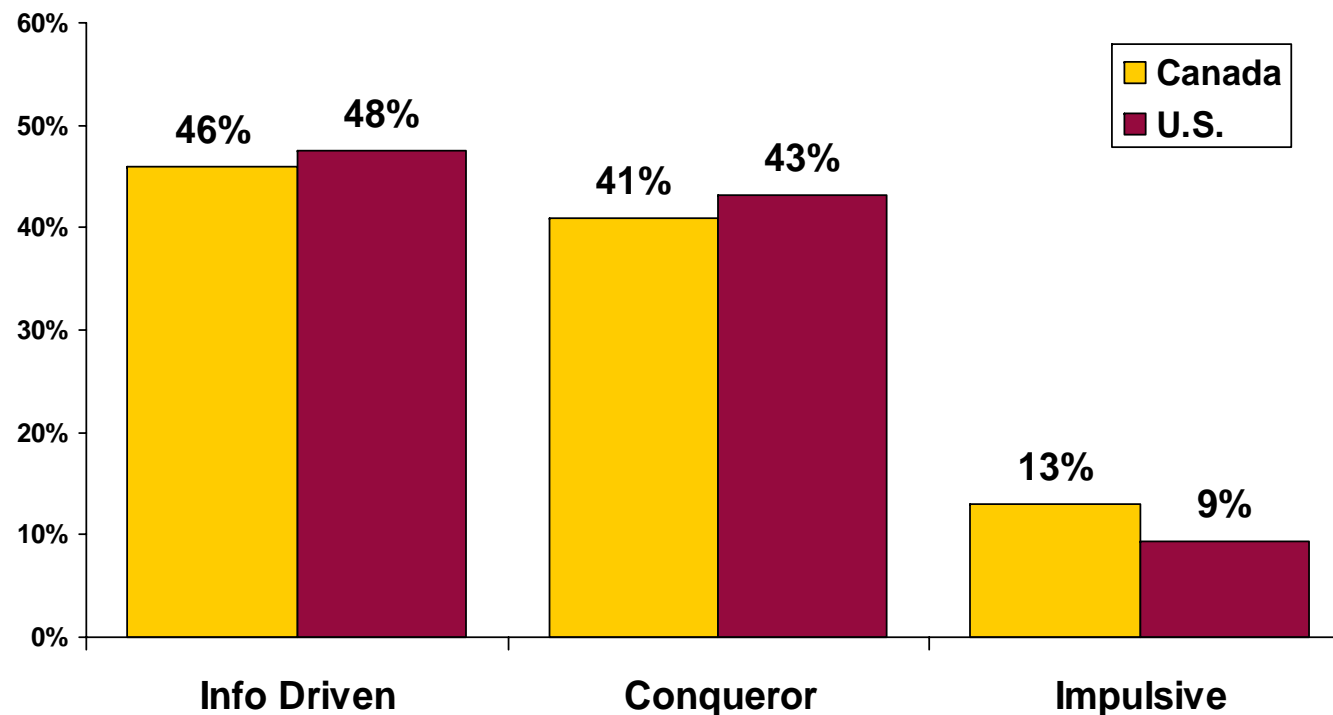
1 Individuals who have made an online purchase in the past six months

2 Individuals who have not made an online purchase in the past six months

Summary of Findings

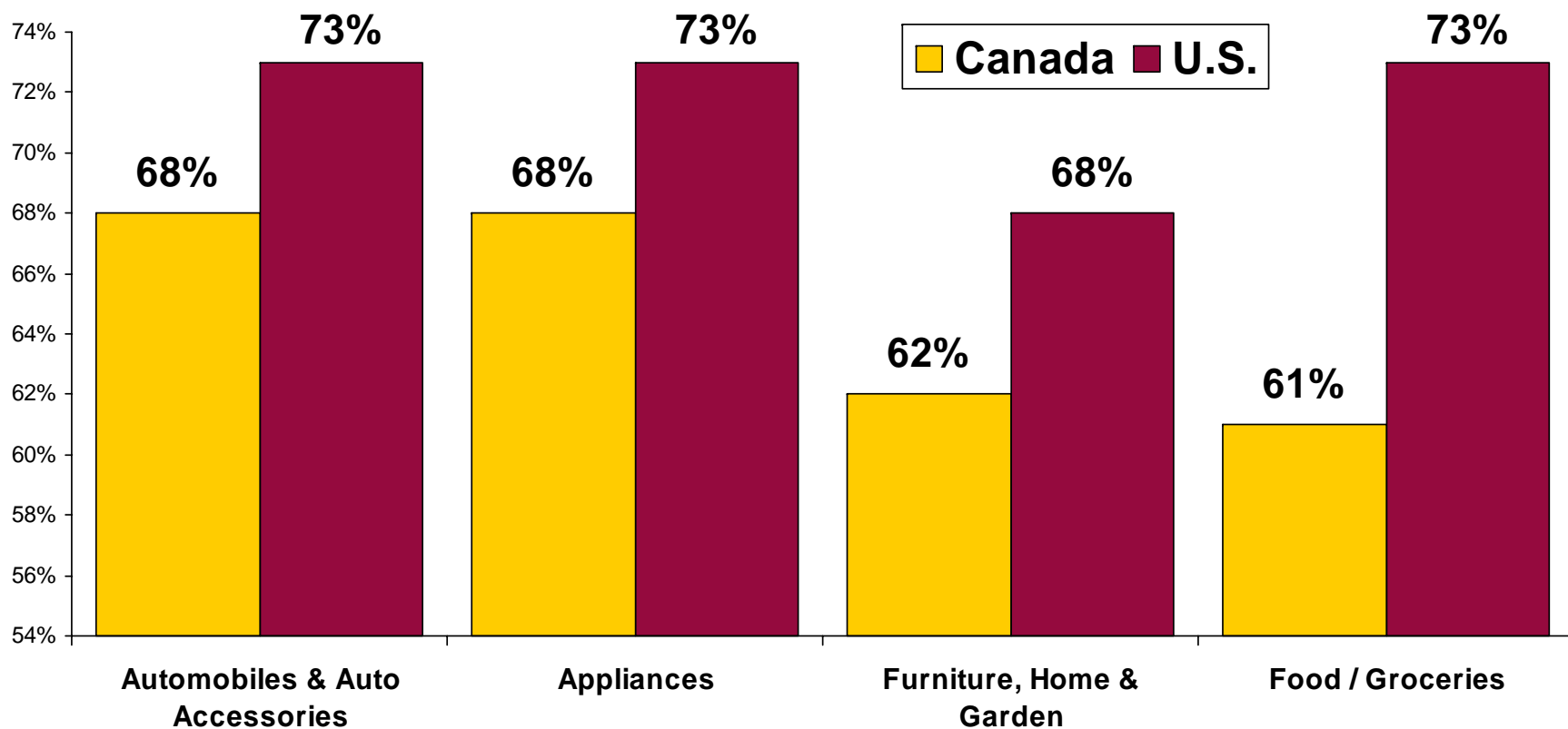
Summary of Findings

- The breakdown of online shopper types between Canada and the U.S. is very similar with **Conquerors and Info Driven** shoppers representing **46%** and **41%** of Canadian online respondents, respectively



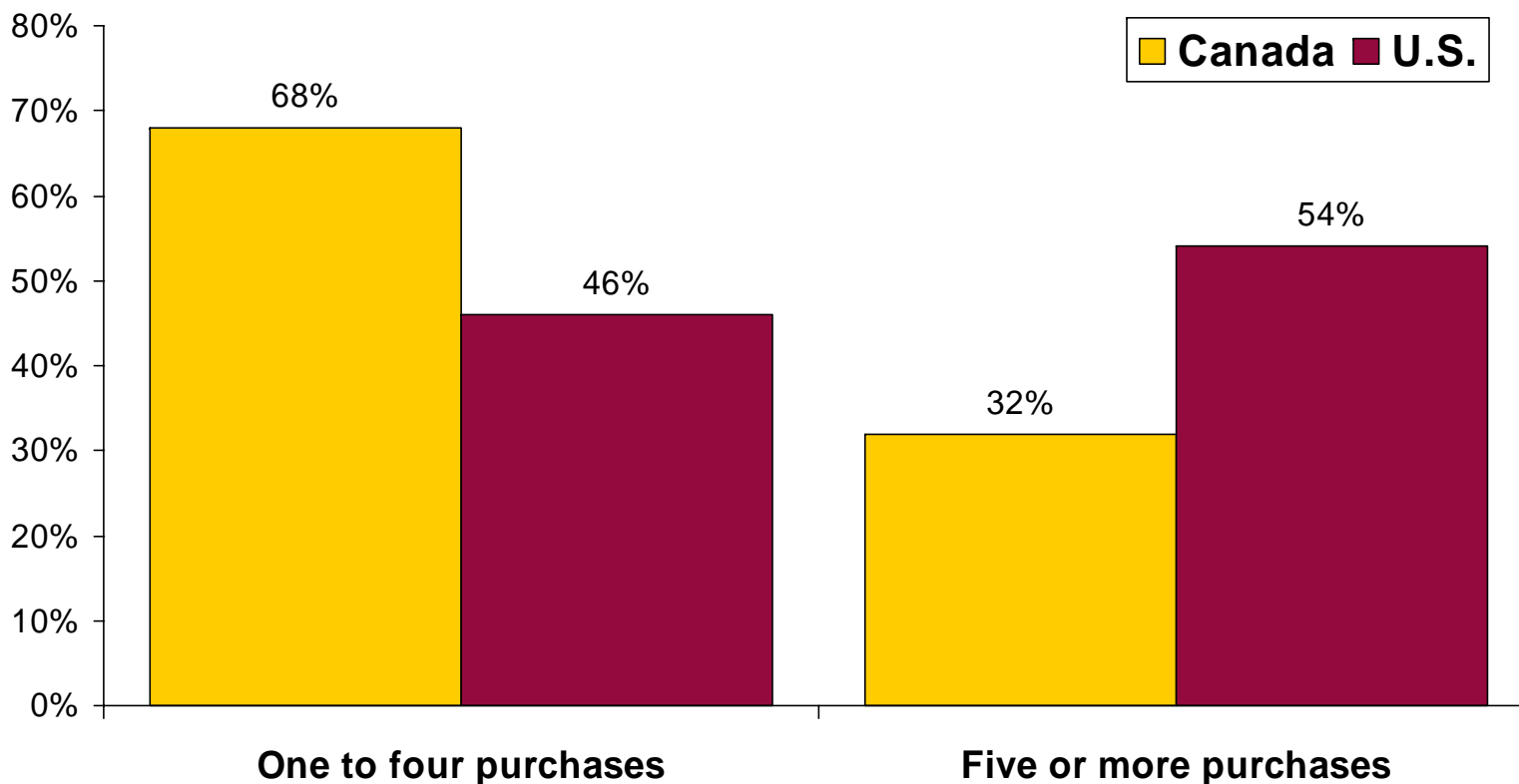
Summary of Findings

- Online influence on offline shopping amongst Canadians **tops 60%** in the Automobiles and Auto Accessories, Appliances, Furniture/Home and Garden, and Food/Groceries categories



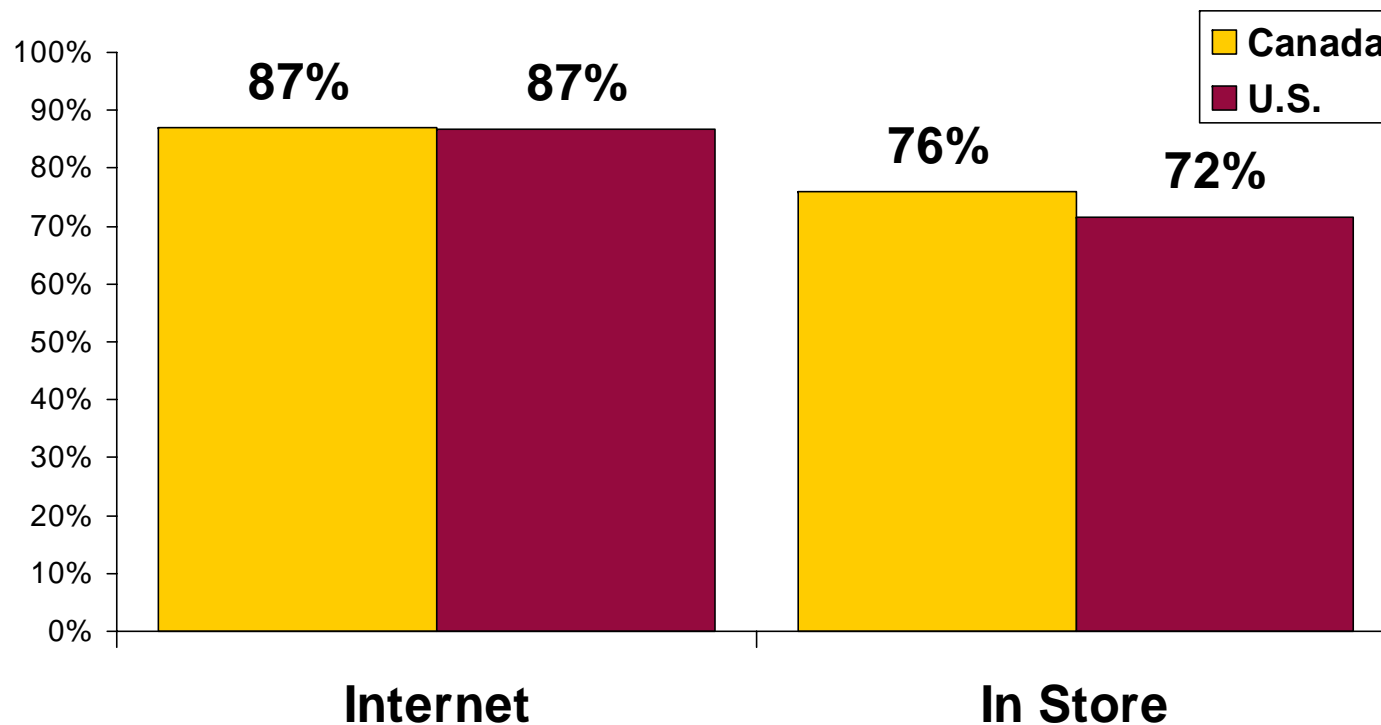
Summary of Findings

- 32% of Canadian respondents who have shopped online made **five or more purchases** in the past six months and 80% made at least two purchases in that same period



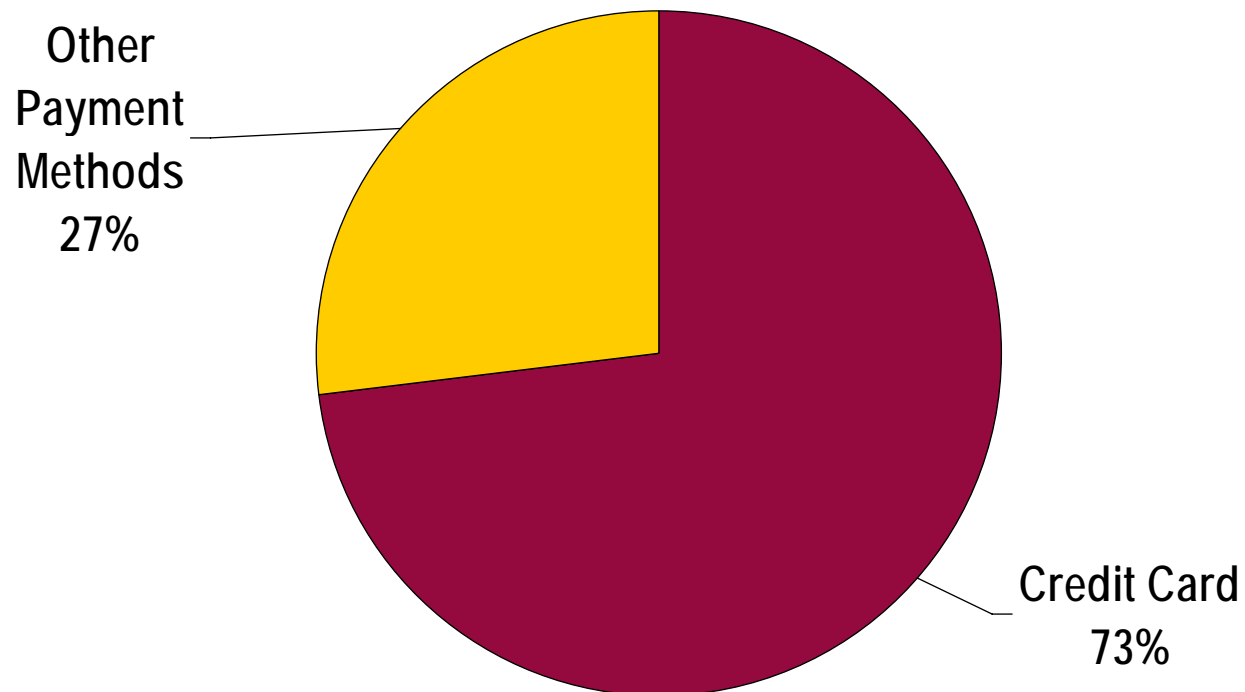
Summary of Findings

- A majority of online shoppers indicated that they were **satisfied with their shopping experience** (87%) on the Internet as compared to 76% who were satisfied with their in-store experience



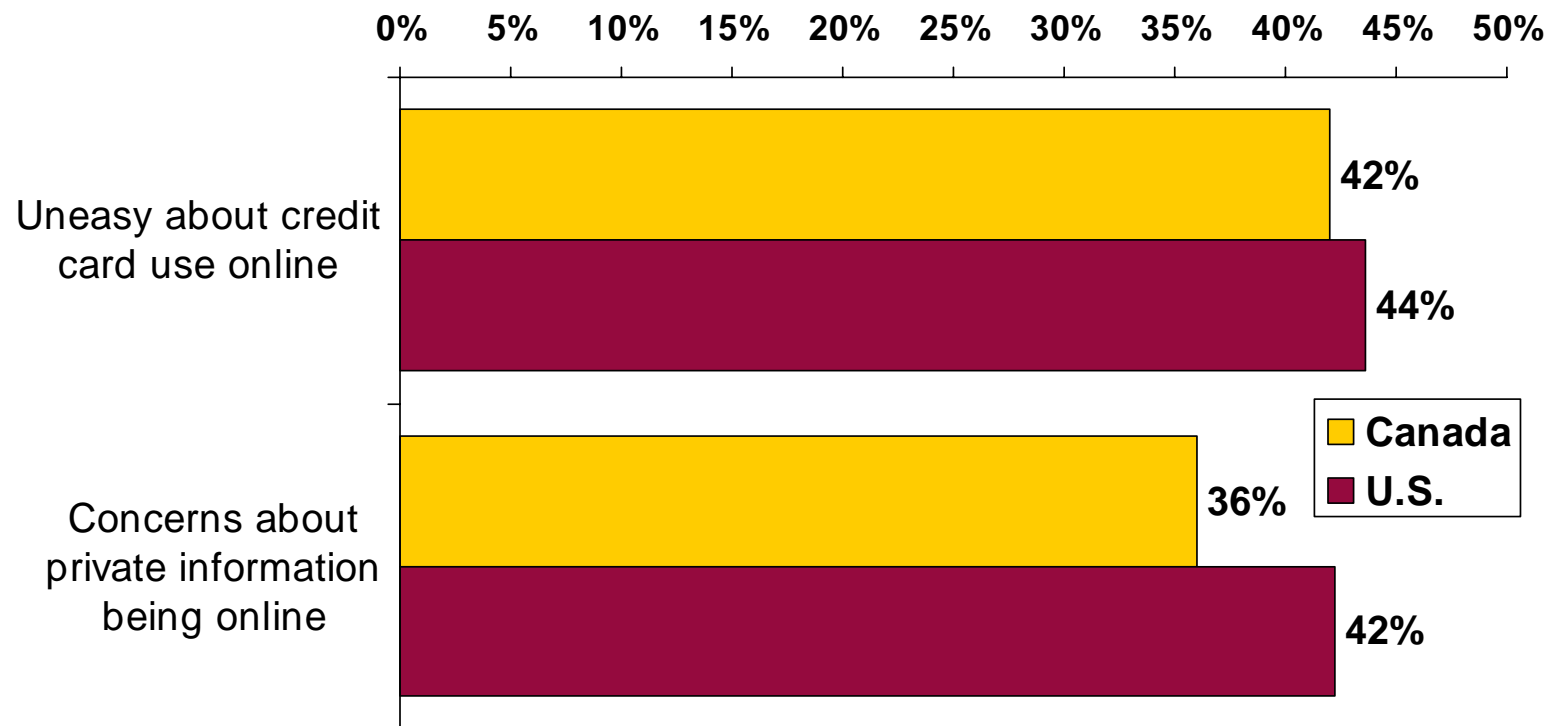
Summary of Findings

- 73% of Canadian online shoppers surveyed **preferred to pay with their credit card**



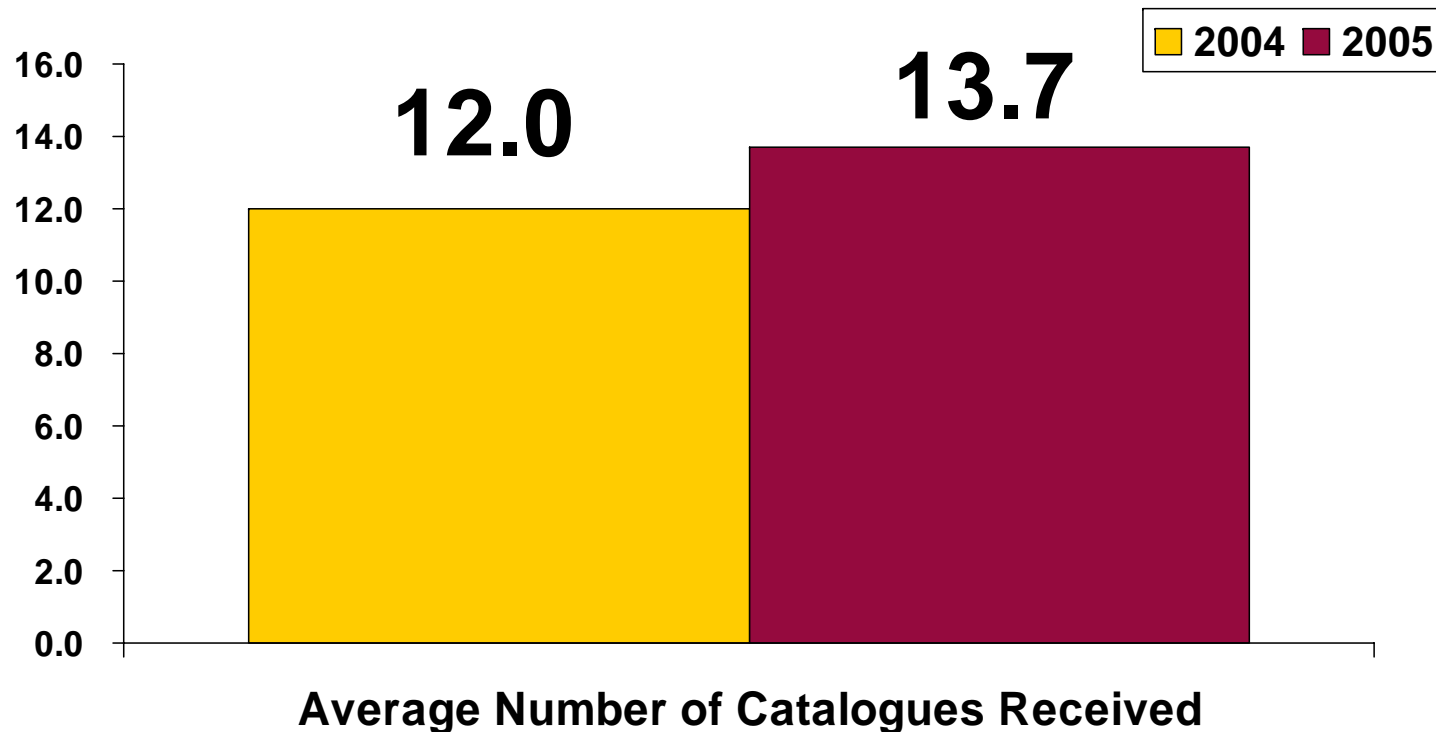
Summary of Findings

- Fraud remains the leading barrier to online shopping with 42% of Canadian offline shoppers reporting **credit card concerns** as a key barrier and 36% evoking worries about **private information** being online.



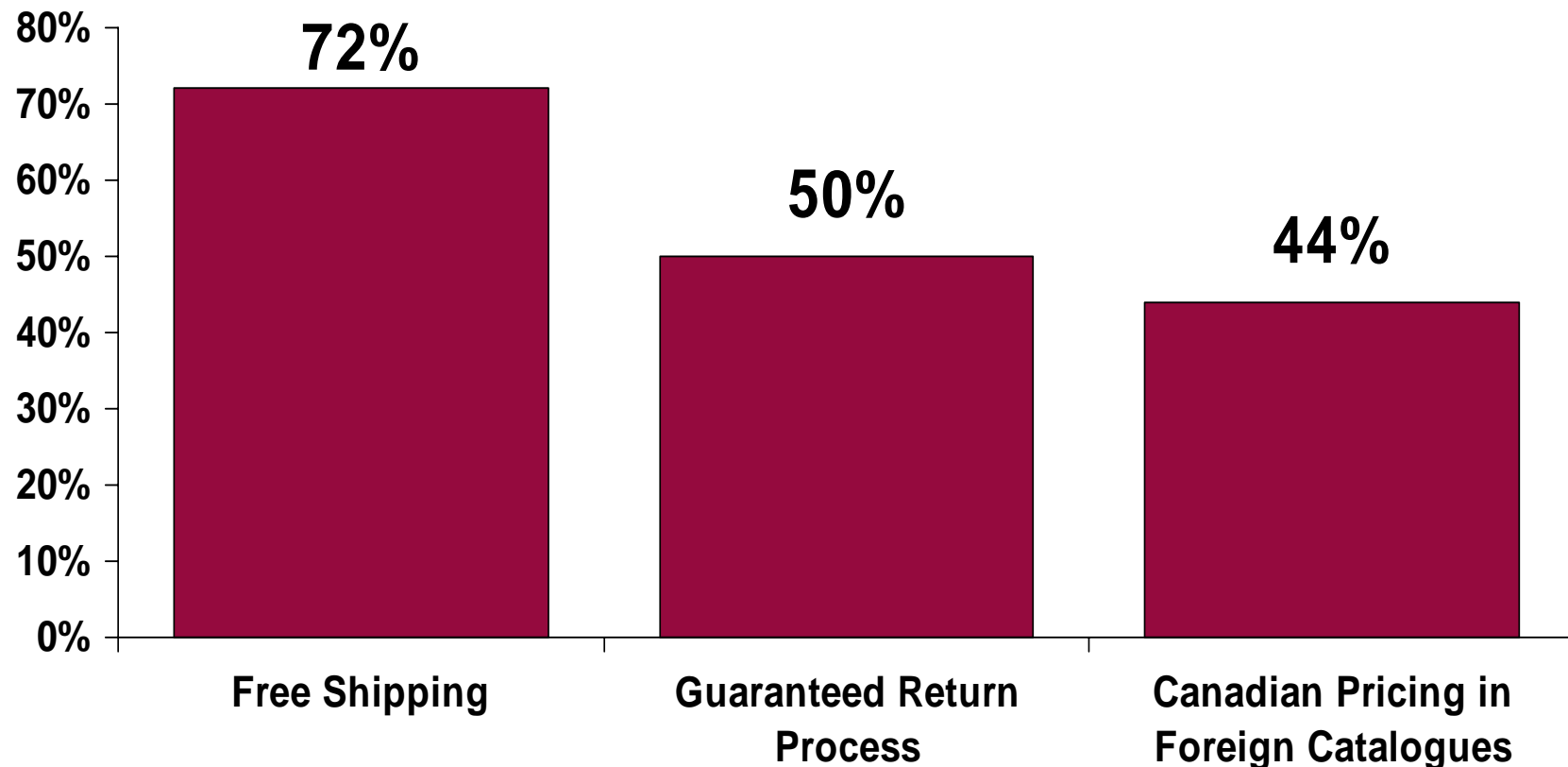
Summary of Findings

- The average number of catalogues received by Canadian online shoppers surveyed **increased 14.2%** between 2004 and 2005



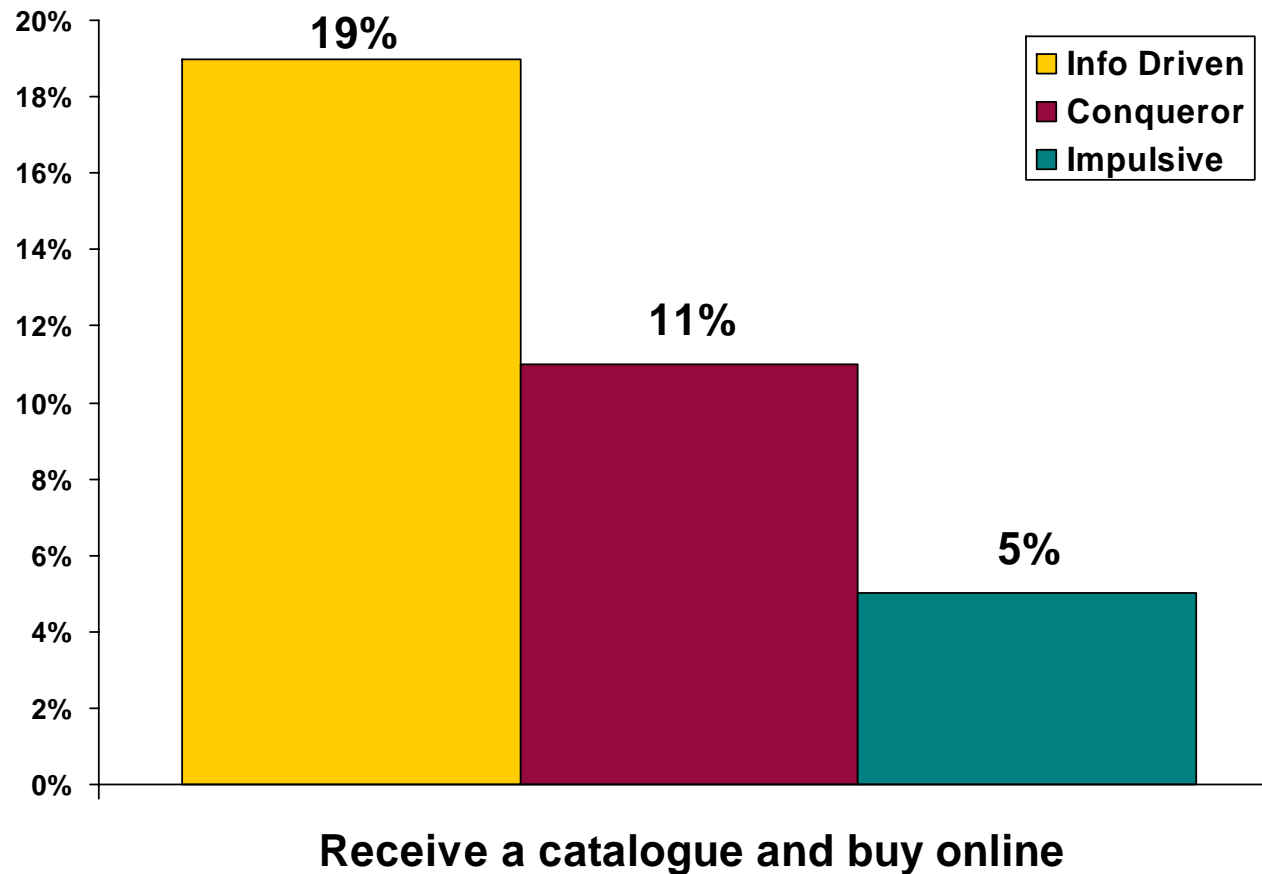
Summary of Findings

- **More than one-half** of Canadian online shoppers surveyed would purchase from a catalogue more frequently if it offered **free shipping** (72%)



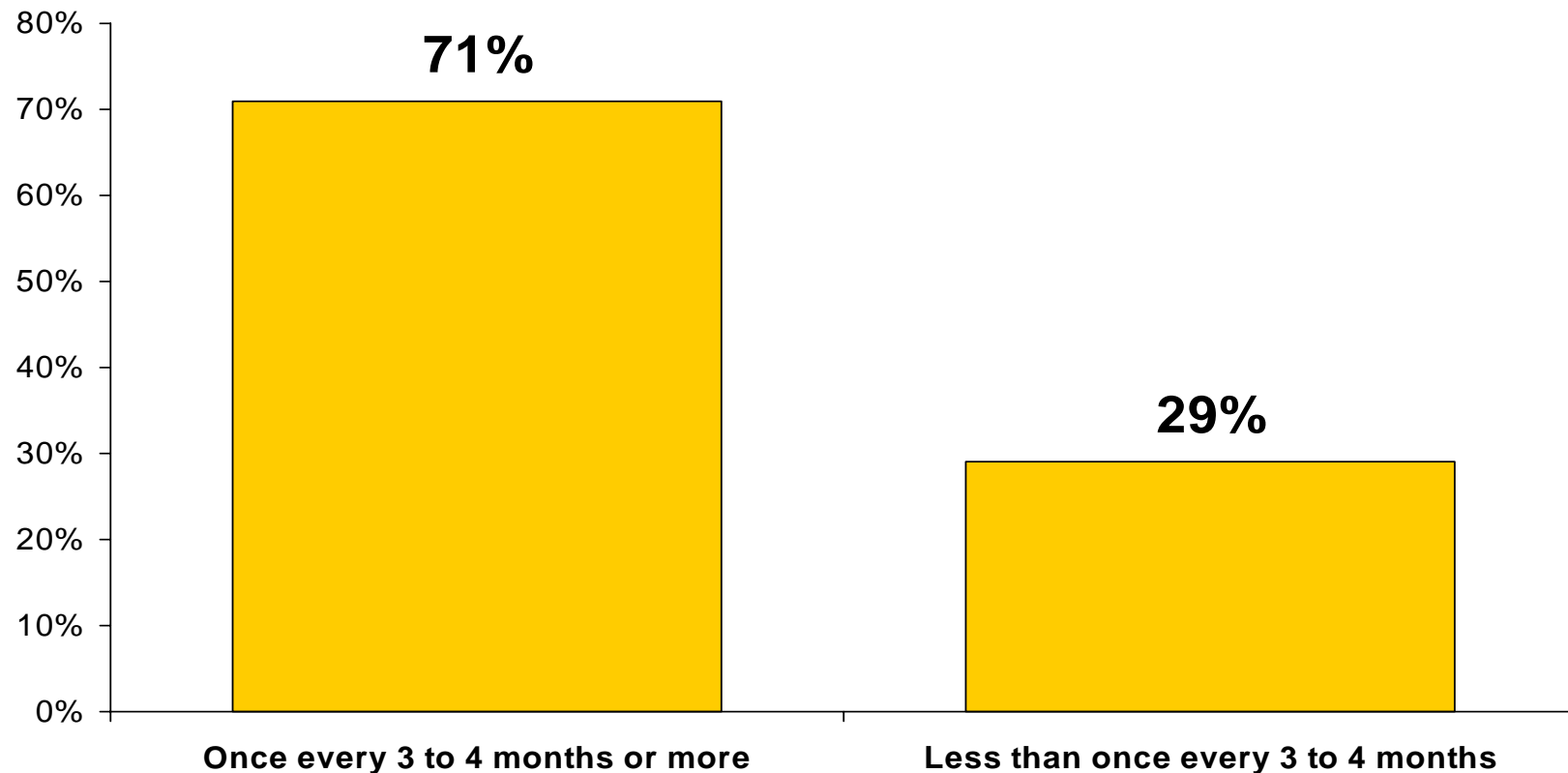
Summary of Findings

- Info Driven shoppers are noticeably more likely to buy online after having **received a catalogue**



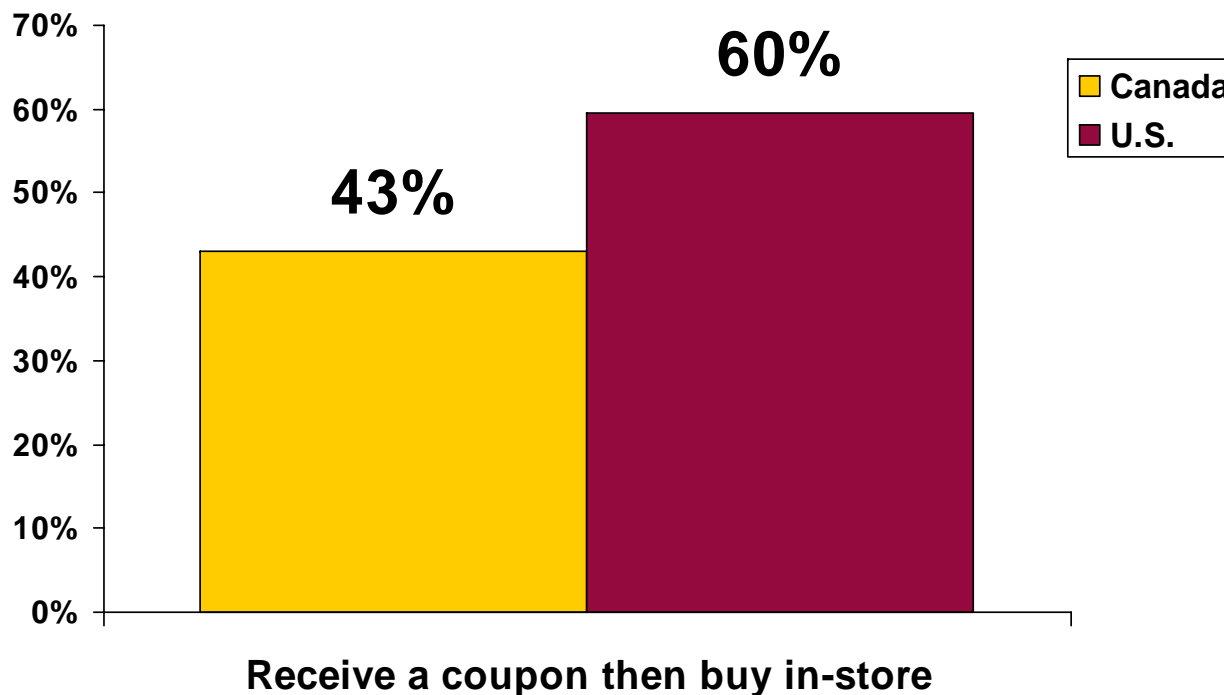
Summary of Findings

- 71% of Canadian online shoppers surveyed **receive at least three catalogues** a year with 49% receiving at least 12 annually



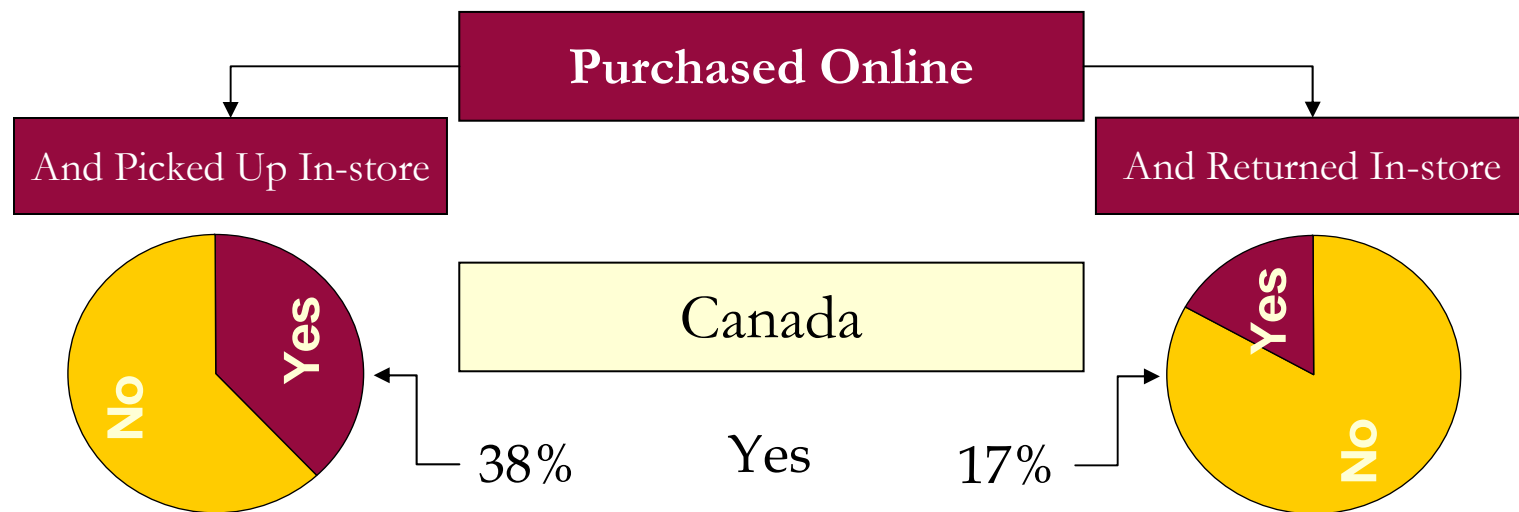
Summary of Findings

- Buying in store after having **received a coupon** is the most frequent (43%) specific multi-channel behaviour exhibited by Canadian online shoppers



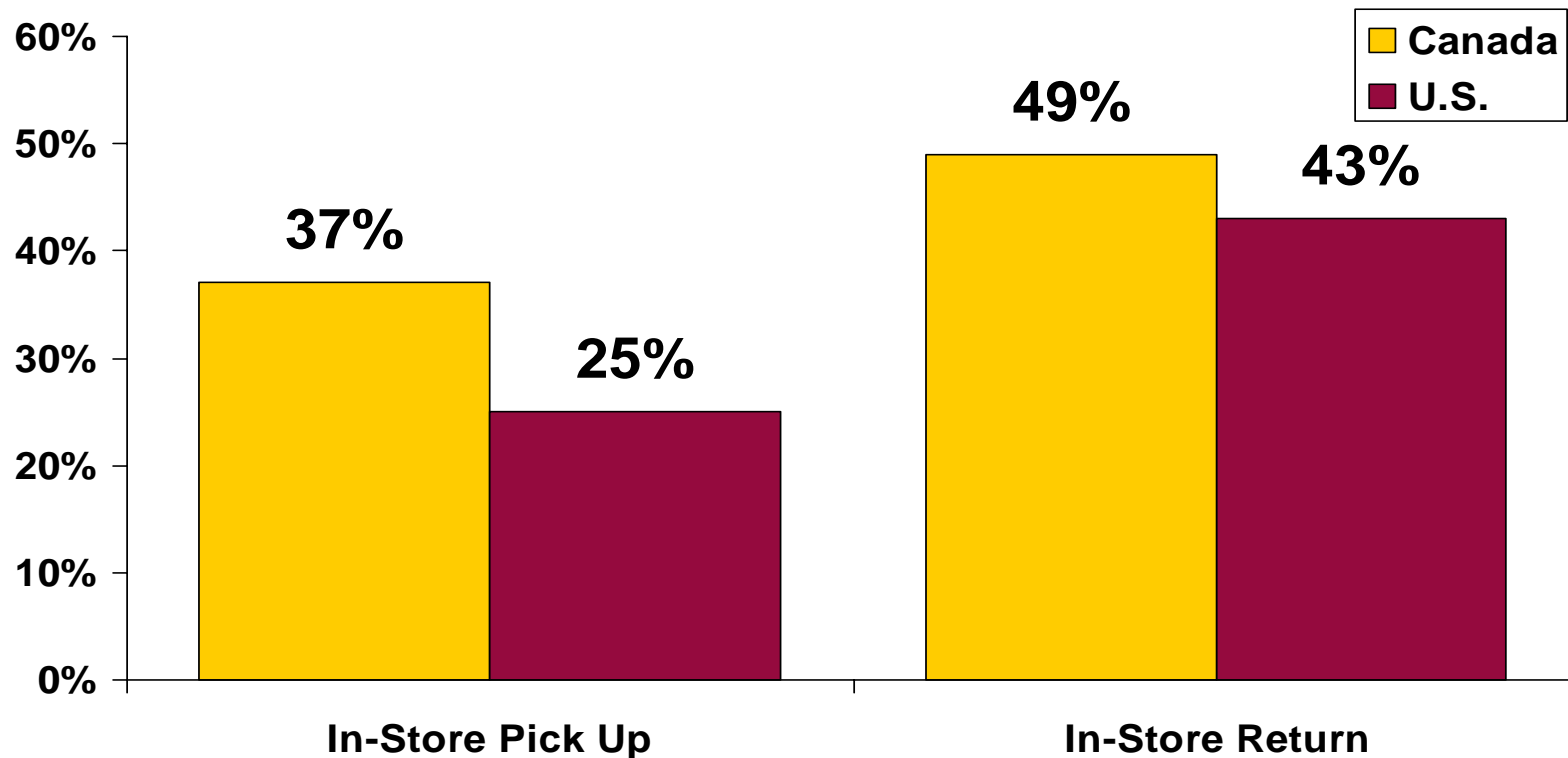
Summary of Findings

- Among Canadian online shoppers, 38% **picked up** their online purchase in-store while 17% made an in-store **return**



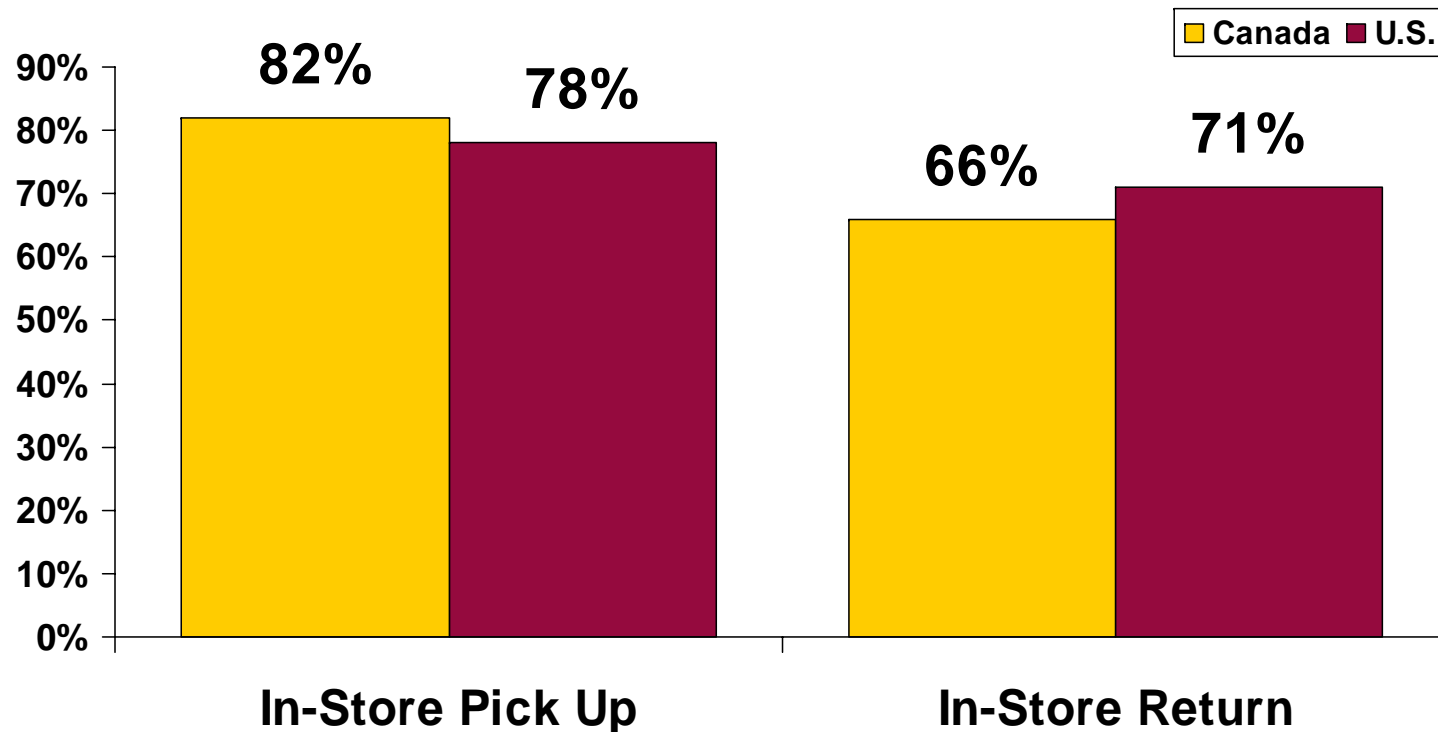
Summary of Findings

- **Convenience** was the primary motivator for Canadians to pick up (37%) and return (49%) in-store



Summary of Findings

- 82% of Canadian online shoppers who picked up in-store, and 66% of those who returned in-store, were **satisfied with the experience**





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