



# SHOPPERS ON SHOPPING

Our exclusive research looks at how Canadians view the grocery shopping experience

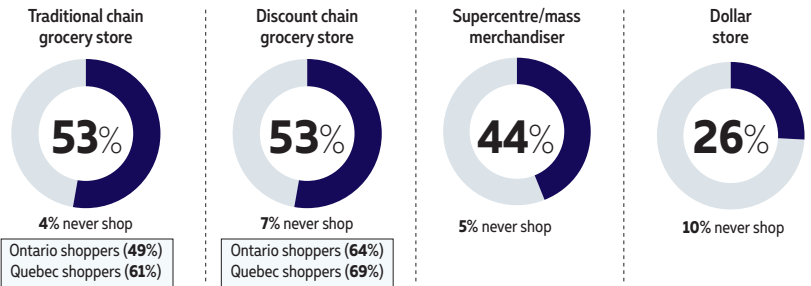
**By Shellee Fitzgerald Illustrations by Lucila Perini**

**What are the** key factors causing shoppers in Canada to choose one grocery store over another? How do they define value? How happy are they with loyalty programs? When it comes to reputation, what things cause them to think positively and negatively about grocers? To get the answers to these questions, and many more, we surveyed grocery shoppers across the country to bring you our fifth-annual *2025 GroceryIQ Study: Taking Stock of Grocery Shopper Attitudes and Behaviours*. Read on to learn some key findings from the study.



## WHERE CANADIANS SHOP

Shop at store once a week or more



### THE PRICE MUST BE RIGHT

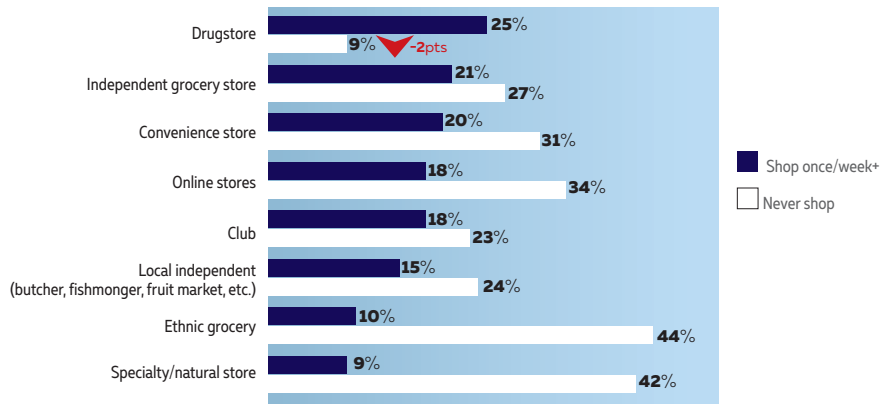
It's no secret that Canadians continue to travel a rough road. Facing economic uncertainty and a persistently high cost of living, many in this country are feeling under pressure and this is impacting their grocery shopping behaviours. According to our 2025 *GroceryIQ* study, price is, by far, the No. 1 factor for 81% of shoppers when choosing where to get their groceries. Sales/promotions are also a top consideration for 69% of those surveyed, whereas the importance of product quality slipped to 72% (down 4 percentage points from last year), while freshness dropped to 68% (from 74%) as shoppers focus on stretching their dollars. Notably, this year's survey showed a 7% jump in the number of shoppers (to 40%) who said store organization is an important factor when deciding where to shop.

A sign of the economic times, discount grocery stores are neck-and-neck with traditional chains when it comes to shopper traffic, with 53% of those surveyed indicating they shop at both types of stores once a week or more. Looking through a regional lens, 69% of Quebec and 64% of Ontario shoppers said they visit a discount grocery shop at least once a week. Other top channels for procuring groceries are superstores/mass merchandisers (44%) and dollar stores (26%).

How loyal are shoppers to a particular store? It turns out, Canadians are a pretty loyal bunch with 72% of shoppers preferring to shop at the same grocery store each time, while just 33% report regularly shopping at four or more stores. It's worth noting, however, that millennials are shopping around more than before with 71% (down from 82% last year) indicating they visit the same store each time, making them a more challenging target for grocers in terms of loyalty.



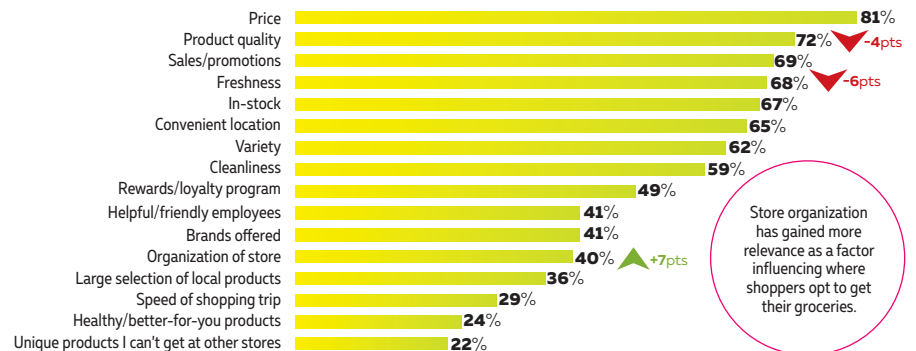
### Grocery shopping frequency by store type



## TOP SHOPPER PRIORITIES WHEN CHOOSING WHERE TO SHOP

Price and promotions are paramount

% selecting factor as important when choosing a grocery store



Store organization has gained more relevance as a factor influencing where shoppers opt to get their groceries.

▲ Statistically significantly higher/lower at the 95% confidence level versus last year  
 Due to rounding, in some charts, percentages may total to 99% or 101%

## HOW STORES STACK UP

So, how do shoppers feel their store measures up? The good news is, shoppers had a favourable view of things such as cleanliness, variety of products offered and organization of the store. Shoppers also reported a more positive experience with their store's loyalty/rewards programs with 54% of shoppers rating them as excellent/very good, up from 49% last year.

They were less impressed, however, with the quality of the prepared foods offered at their grocery store, with just 30% (down from 35%) indicating they thought they were good, while 18% (up from 14%) thought these foods were fair/poor, suggesting grocers might want to up their game in this important category.

When asked what areas of their grocery store most needed to improve, 27% of shoppers pointed to the checkout experience. Long lines, insufficient cashiers and issues with self-checkout machines were all indicated as pain points. Product availability was selected as an area needing improvement by 23% of survey respondents, with shoppers peeved by inconsistent inventory, sale items not being available and out-of-stocks. In fact, our survey found shoppers have low tolerance for stock issues, with 73% indicating a likelihood to switch stores if an item is unavailable at their usual store.

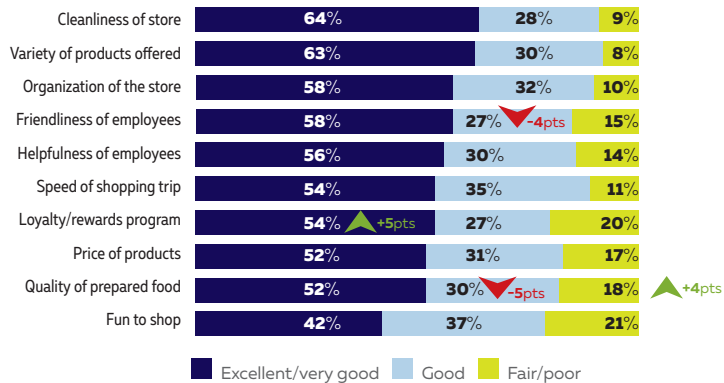
As the concept of value continues to evolve, we wanted to understand how shoppers define it. Turns out, it's not all about price. For nearly six in 10 shoppers (58%), value means a fair balance between the quality received for the price they pay. Just 20% of shoppers define value in terms of product attributes (quality, freshness, quantity), while 19% think of it as discounts and deals and competitive pricing.

It's no secret that grocery retailers, hailed as heroes during the pandemic, have had to grapple with some hits to their reputation in the post-COVID era. When we asked shoppers how they rate the reputation of their primary grocery store, overall, 55% said their store had a good reputation, while 31% rated their store as having an excellent reputation, 12% said neutral and 2% said their store had a poor reputation. Price and value, product quality and selection, customer service and store experience were the top factors shoppers said positively impacted a grocer's reputation. Meanwhile, pricing issues (gouging, inflation concerns),

## HOW GROCERY STORES ARE PERFORMING

While half of shoppers report a positive experience with loyalty programs, employee friendliness and quality of prepared foods are slipping

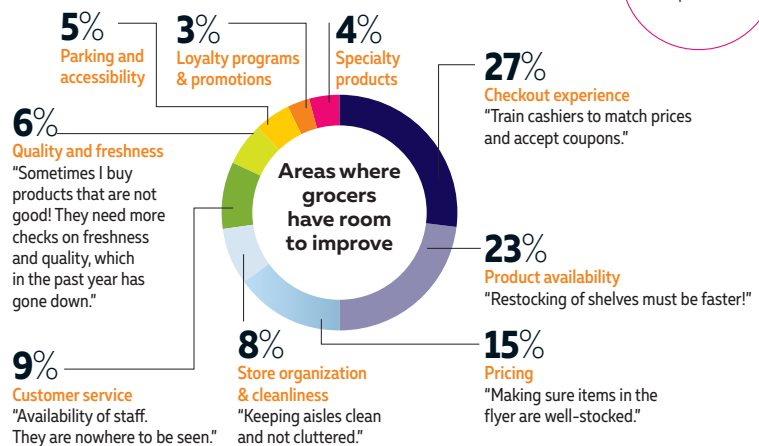
Performance ratings for grocery store shopped most often



## ROOM FOR IMPROVEMENT

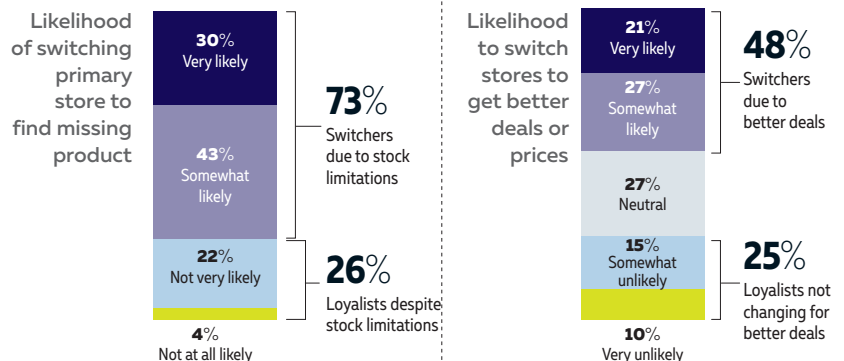
Long checkout lines, out-of-stocks and high prices irk shoppers

Verbatims captured from survey respondents



## WILLINGNESS TO SWITCH STORES

Most shoppers will switch stores for a missing item, showing no tolerance for out-of-stocks



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customer service problems (understaffing), product availability and corporate practices (ethical concerns, price-fixing scandals) were factors shoppers said negatively impact reputation.

## A LIFT FOR LOYALTY PROGRAMS

Grocers have stepped up their attempts to lock in the loyalty of shoppers by delivering savings, personalized offers and other perks at a time when Canadians are struggling to cope with the high cost of living. The efforts appear to be paying off, according to our 2025 GroceryIQ study. Shoppers' satisfaction with loyalty programs is on the rise, with 59% (up from 54% last year) of those surveyed indicating they are extremely/very satisfied with their grocery store's program and 33% are somewhat satisfied. Why are they more satisfied with loyalty programs this year? In verbatims captured, shoppers said their "loyalty reward program is practical and useful," and they liked receiving "cash back at the end of the year."

For those shoppers not wooed by grocery loyalty programs, the top reasons given were: "requires too many purchases to earn rewards/points" (30%), "the rewards/points/discounts are not valuable to me" (24%), and "requires me to sign up for a credit card" (23%, up 12 percentage points from last year).

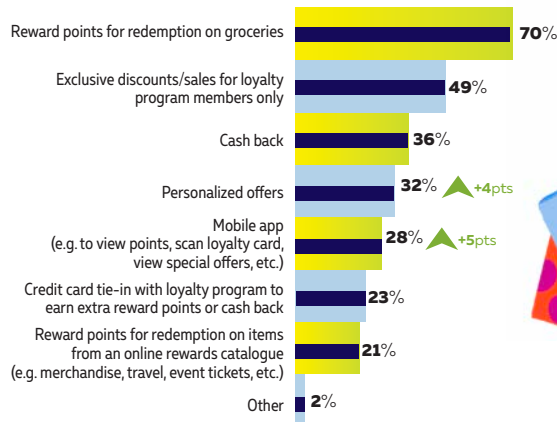
## IN-STORE AND ONLINE

How Canadians procure groceries is unchanged in the past year, with most shoppers (98%) indicating they visited a physical store in the past month. Breaking down online shopping, 17% of those surveyed used an online contactless delivery service in the past month, while 19% (up from 18%) opted for in-person delivery, and curbside pickup and in-store pickup were both used by 14% of shoppers. While satisfaction with online shopping improved, with 51% (up from 45%) of survey respondents saying they were completely/very satisfied with the experience, pain points remain. Among those not completely satisfied with online shopping, 27% (up from 20%) said they were unhappy with the quality of products and 15% (compared to 9% a year ago) complained the store didn't offer a delivery service. On a bright note, fewer shoppers were unhappy with product substitutions, 24% versus 32% a year ago.

When asked how they planned to shop

## LESSONS IN LOYALTY

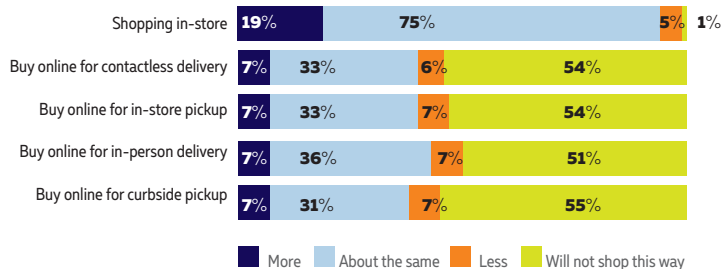
Rewards points, exclusive discounts and personalized offers among the most valued loyalty program features



## IN-STORE AND ONLINE SHOPPING

A preference for in-person shopping is not expected to change in the upcoming year, making it important for grocers to create an optimal in-store experience

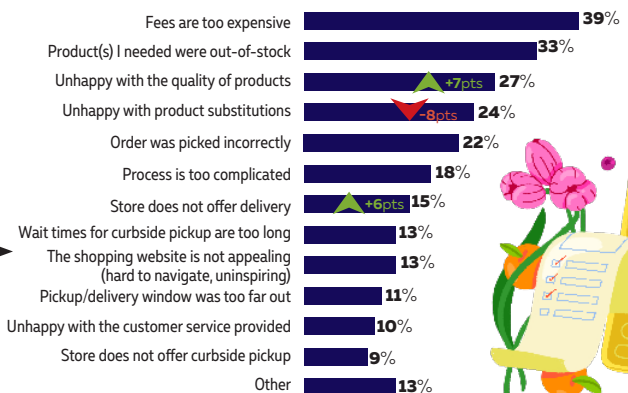
Anticipated use of purchase methods one year from now versus today



Satisfaction with online shopping



Reasons shoppers are not completely satisfied with online grocery shopping



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in the year ahead, our survey found the preference for shopping in-person is not expected to change. With 86% of all shopping “trips” currently happening at the store, the pressure is on for grocers to deliver an optimal in-store experience.

## WHAT'S IN THE BASKET?

Grocery shoppers in Canada are not a spontaneous bunch. Our survey reveals a shift towards planned and deliberate shopping with 19% (up from 17% a year ago) saying they head to the grocery store with a list and don't deviate from it, while 66% (up from 64%) have list in hand, but will make additional purchases in the aisles. A scant 2% of shoppers reported

visiting a store without a list, deciding what to purchase when in-aisle.

While fresh produce and dairy were purchased by more than 80% of shoppers (unchanged from last year), there was a notable decline in the number of shoppers purchasing cereal, confectionery and alcoholic beverages. In the non-edible categories, paper products remained the most purchased (among 57% of shoppers) and, notably, flowers and plants experienced a jump with 14% of shoppers (up from 10%) buying these items. Meanwhile, there were significant declines in the number of shoppers purchasing personal care products and beauty items.

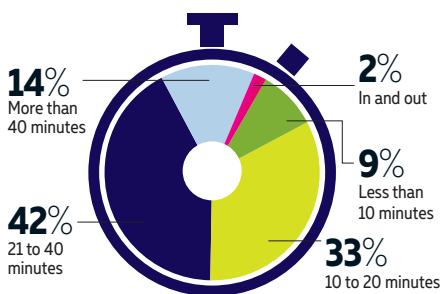
Our study also revealed shoppers are

continuing to employ several strategies to help cope with inflation. Nearly half (48%) of shoppers said they were buying discounted items, while 40% said they were making fewer impulse purchases, 30% said they were shopping more frequently at discount grocery stores and the same number reported adding more private-label items to their baskets.

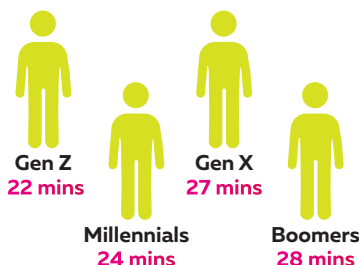
Digging into private label a bit further, nearly half of shoppers surveyed said they always/often buy store-brand items, with 42% saying they do so sometimes. When asked why they purchase these items, the top reason, by far, was to save money (for 73% of shoppers). But, this year, notably, a growing number of shoppers (15% versus

## THE GROCERY SHOP

How long does a typical trip to the grocery store take?

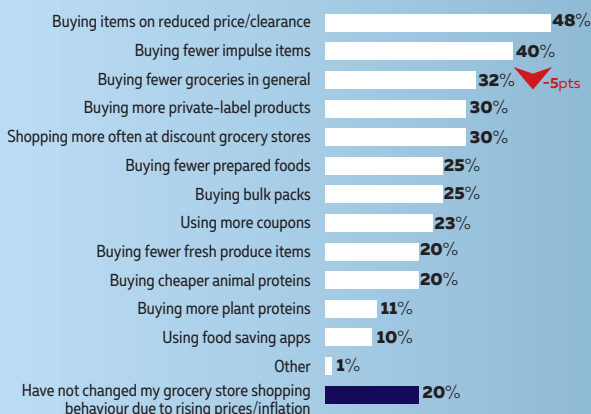


The average trip to the grocery store takes 26 minutes



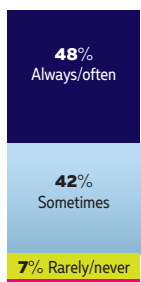
## Coping with inflation

Strategies shoppers are using to manage costs

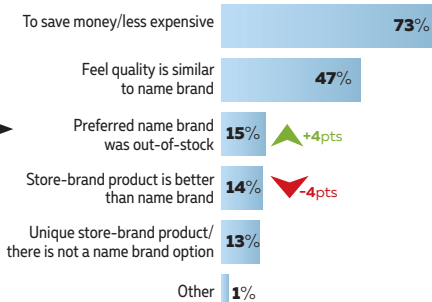


## The power of private label

Purchase frequency of private label



Reasons for purchasing private label



Change in purchase frequency of private label



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11%) said it was because their preferred name brand was out-of-stock. Notably, fewer shoppers (14% versus 18% a year ago) said they thought the private-label item was better than the name brand.

We also asked shoppers to tell us what products or services they wish their grocery store offered. Thirty-four per cent of respondents said they'd like to see more enhanced product offerings at the store, including more fresh and prepared foods, specialty and international products, as well as more organic and local items. They also expressed a desire for more convenient services: 15% said they'd like to have more in-store amenities and grocery delivery and pickup options.

## PREPARED FOODS

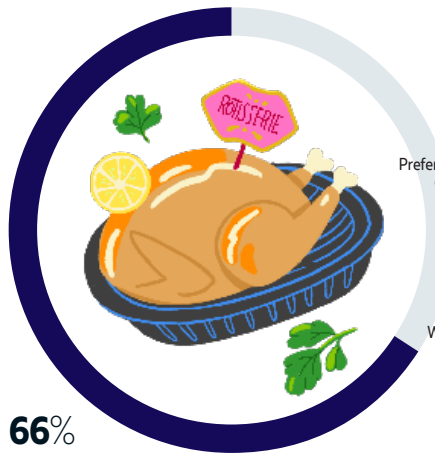
How hungry are grocery shoppers for prepared foods? Our survey suggests shoppers still have a healthy appetite for these convenient foods, with the majority (66%) purchasing prepared foods in the past month, consistent with last year. Among those shoppers who choose not to purchase prepared foods at the grocery store, the top reasons given are they are too expensive (47%) and they prefer not to purchase them from the store/prefer to cook at home (46%).

When purchasing prepared foods price/value, quality, freshness, taste and portion size are the most important factors to shoppers. And the good news is, prepared food shoppers reported greater satisfaction with their purchases, with 60% of shoppers indicating they're "completely/very satisfied," up from 53% last year. Our survey also revealed that grab-and-go refrigerated prepared foods are gaining popularity with 54% (up from 47% of shoppers a year ago) reporting purchasing these items in the past month, while 26% purchased made-to-order foods.

Dinner remains the most popular daypart for prepared foods with 55% of shoppers making a purchase for this meal occasion, consistent with last year. Twenty-three per cent of shoppers made a lunch purchase with 4% and 3% buying prepared foods at breakfast and morning snack dayparts, respectively. Although these morning meal purchases edged up slightly compared to last year, there's clearly an opportunity for grocers to boost efforts in this daypart and steal share from fast-food restaurants.

## HUNGRY FOR PREPARED FOODS

Most shoppers purchase prepared foods at the grocery store



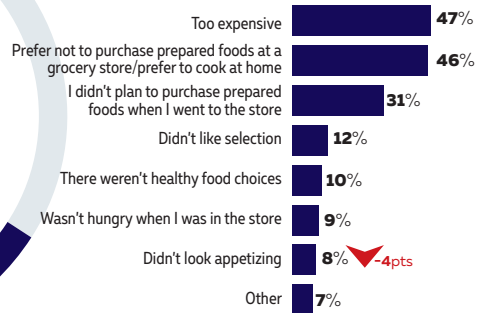
**66%**

Purchased prepared foods at grocery in the past month

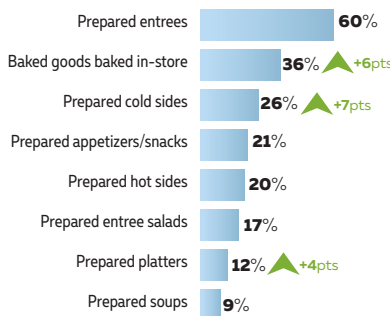
**2.0**

Average prepared foods purchase occasions in the past month

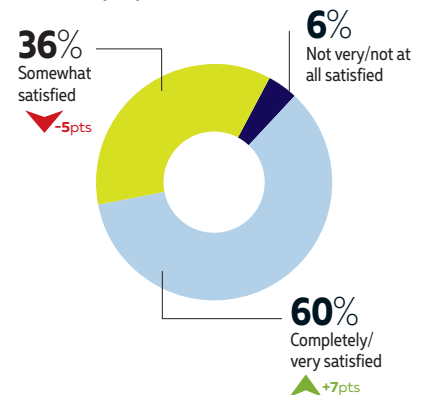
Top reasons for not buying prepared foods



Types of prepared foods purchased at grocery

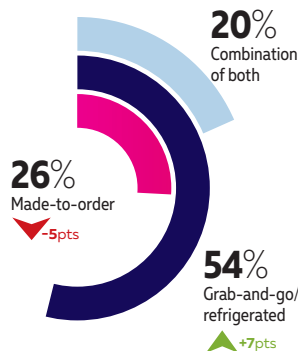


Satisfaction with prepared foods

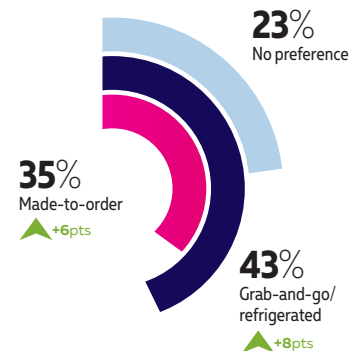


## Grab-and-go prepared foods are rising in popularity

Prepared foods purchased



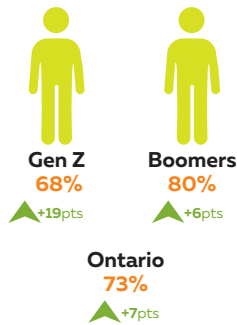
Prepared foods preference



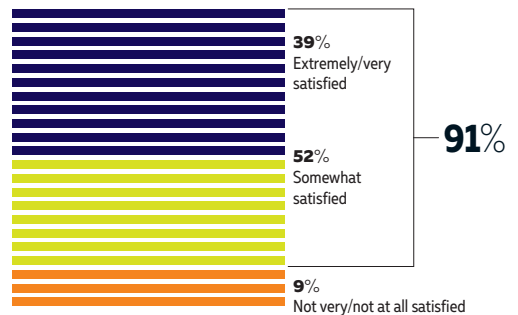
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## THE HEALTH-MINDED SHOPPER

More shoppers identify as being health-conscious

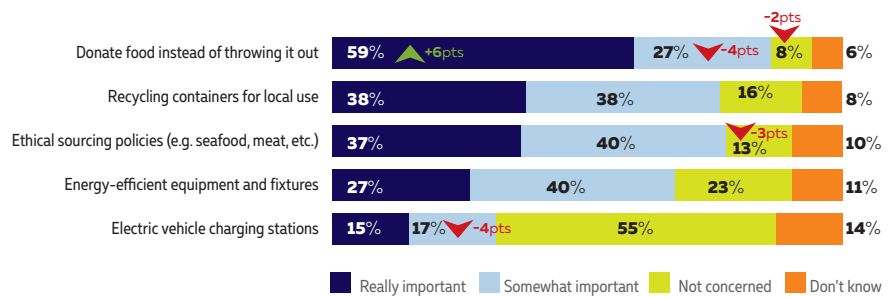


Satisfaction with healthy options at the grocery store



## SUSTAINABILITY

Importance of demonstrating a commitment to sustainability



### THE HEALTHY SHOPPER

Good health and well-being are goals many Canadians are pursuing—the explosion of the health and wellness market is proof of that. So, it's no surprise that 73% of shoppers in our survey said they agree with the statement “I am health-conscious,” the figure jumps to 80% among boomers. Grocers have been leaning in to the health and wellness trend, expanding their offerings and services in this key area. This strategy appears to be working as a growing number of shoppers 39% (up from 32%) indicated they were “extremely/very satisfied” with the selection of healthy and better-for-you products available at their grocery store, and another 52% were “somewhat satisfied.” Just 9% of shoppers were not happy with the selection of healthy goods available, down from 10% last year.

Product freshness and sugar content were the top concerns for health-conscious shoppers, consistent with last year. There were, however, some notable

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shifts, with a growing number of shoppers (23% versus 19% a year ago) interested in all-natural foods, 15% concerned about artificial flavours (up from 11%) and 13% concerned about antibiotics in foods, up from 9% last year. We also asked shoppers what health-focused offerings they valued most at the grocery store and while 28% said in-store pharmacies, followed by healthy recipe cards at-shelf (valued by 21% of shoppers), for many shoppers these offerings are not critical.

The health of the planet is also an important consideration for shoppers. In fact, when asked how important it is for grocery stores to demonstrate a commitment to sustainability practices, an increasing number of shoppers (59%, up from 53% last year) said it was “really important” that grocers donate food rather than toss it out. In terms of ethical sourcing practices, 37% of shoppers

said this was “really important,” with 40% indicating this was “somewhat” important to them. While most shoppers surveyed (61%) expressed some level of likelihood of switching to a grocery store that demonstrates a stronger commitment to sustainability, 47% (up from 41% a year ago) say they are unwilling to pay extra to shop at a more sustainable store. **CG**

### Overview & Methodology

- Survey sample: 1,002 grocery shoppers
- Respondents were required to be age 18+, reside in Canada, shop at grocery stores at least once a month and are the primary or shared decision-maker for household grocery shopping
- Quotas were established to accurately represent the population distribution of Canada