

Canadian Lifestyles: The Cost of Convenience - Canada - April 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Canadians are spending a little more conservatively, meaning consumers will need more to ‘sweeten the pot’.
For companies, a slowing economy also means that supporting margins will be a priority. Moving into 2019, being mindful that ‘value is in the eye of the beholder’ will play a big role in connecting with consumers.”
– Carol Wong-Li, Associate Director – Lifestyles and Leisure

This report looks at the following areas:

- Consumers are pulling back on discretionary spending, encouragements will be needed
- On-the-go solutions will resonate as commuting is a part of everyday life for most
- Opportunities aplenty during weekdays thanks to flexible work arrangements
- Consumers could use some help achieving work-life balance
- The majority of Canadians are willing to pay for time-saving shortcuts

The shine of the positive economic conditions seen in 2017 has started to wear off, leaving consumers to feel less confident in their financial situation and pull back on discretionary spending. Therefore, consumers will need added motivation. Positively for companies, value can come in many forms. With longer working days and long commutes, weight is placed on convenience, creating a more receptive audience for solutions from companies for time-saving products or services. Though the bulk of Canadians feel they have a good work-life balance, self-care and household chores are felt to be compromised. This is an interesting time for companies right now as longer commutes means more opportunities to connect with consumers while they are literally in-between places while flexible working arrangements mean that more consumers are out and about during traditional working hours than ever.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Canadian Lifestyles: The Cost of Convenience - Canada - April 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Definition

Executive Summary

Canada today

The people

The economy

The consumer

Consumers are pulling back on discretionary spending, encouragements will be needed

Figure 1: Perception of financial health, January/February 2015-19

On-the-go solutions will resonate as commuting is a part of everyday life for most

Figure 2: Commute time and method, January 2019

Opportunities aplenty during weekdays thanks to flexible work arrangements

Figure 3: Work locations, January 2019

Consumers could use some help achieving balance

Figure 4: Areas impacted on work days, January 2019

Canadians hungry for time-savers, so much so 65% are willing to pay for them

Figure 5: Time saving attitudes and behaviours, January 2019

What it means

Canada Today – The People

What you need to know

The face of the nation is changing

Canada's population is growing quickly...

Figure 6: Population growth by numbers, 1986-2017

...thanks to immigration

Figure 7: Proportion of foreign-born population in Canada, 1981-2036

The net result is an ever-richer cultural mosaic

More than meets the eye, acknowledging inclusivity is going beyond what you see

Changing dynamics for working Canadians

More parents are working full-time

The population is concentrated in urban areas

Figure 8: Share of population of Canada, by territory/province, 2018

Commuting times are getting longer as are working hours

Consumers will crave more ways to cater to an on-the-go lifestyle

Canada has more seniors than children

Figure 9: Population aged 0-14 and 65+, as of July 1, 1995-2035*

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Canadian Lifestyles: The Cost of Convenience - Canada - April 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Canada Today – The Economy

What you need to know

Economic growth slowed in the latter half of 2018

Figure 10: Quarterly growth rates of real GDP, change over previous quarter, Q4 2013-Q4 2018

Figure 11: Canada bank rate, March 2014-December 2018

Job-related factors may be creating a squeeze on consumers

Canada's labour participation rate decreases in 2018

Figure 12: Canada's labour participation rate, 2014-18

Wage growth has not kept up with inflation

Figure 13: Wage-Common year-over-year percentage change, Q1 1998-Q3 2018

Figure 14: Monthly movement in selected components of the Canadian Consumer Price Index, seasonally adjusted, December 2013-December 2018

Figure 15: Monthly movement in selected components of the Canadian Consumer Price Index, seasonally adjusted, December 2013-December 2018

Expenditure Overview

What you need to know

Total Canadian consumer expenditures in 2018

Figure 16: Total Canadian consumer expenditure, at current prices, 2018

Looking back, which categories have done well?

Outlook for 2023

Figure 17: Total Canadian consumer expenditure and fan chart forecast, at current prices, 2013-23

Looking forward, which categories will stand out?

Category Review – In-home Food

What you need to know

What it means

In-home food sales to grow at a steady pace

Figure 18: Best- and worst-case forecast value sales of the food (at home) market, at current prices, 2013-23

What to watch

The tension between convenience and quality remain for Canadians when choosing what to eat

Plant-based foods continue to become more mainstream

Waste is increasingly becoming a prominent topic for retailers and manufacturers in Canada

Food's centrality to day to day life drives higher than average engagement

Moms remain primarily responsible for cooking

Engagement with cooking process provides Canadians with a sense of accomplishment

Figure 19: Category engagement – In-home food, January 2019

Key consumer findings

More alternative protein options to come

More real estate will be dedicated to pre-prepared foods in grocery stores

Companies respond to consumer demand for greater transparency

Category Review – Alcoholic Beverages (at Home and On-premise)

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Canadian Lifestyles: The Cost of Convenience - Canada - April 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

What you need to know

What it means

In-home alcoholic beverage sales forecasted to outpace on-premise sales

Figure 20: Best- and worst-case forecast value sales of the alcoholic beverages (at home) market, at current prices, 2013-23

Figure 21: Best- and worst-case forecast value sales of the alcoholic beverages (out of home) market, at current prices, 2013-23

What to watch

Navigating the positioning of 'sessionability'

Can alcoholic beverages also be healthy?

Figure 22: NÜTRL Vodka Soda – Not Sweet At All (Bus), October 2018

Figure 23: Truly Spiked & Sparkling Water Mix Pack (US), February 2019

Shaken or stirred? Serving up social inspiration for the cocktail revolution

Figure 24: Gordon's Premium Pink Distilled Gin (UK), August 2017

Figure 25: Beefeater Pink Premium Pink Gin with a Hint of Strawberry (UK), April 2018

Engagement around alcoholic beverages lower versus overall consumer base

Opportunity to better engage women with unique flavours

Figure 26: Category engagement – Alcoholic beverages, January 2019

Key consumer findings

Buying wine can be daunting for some, but consumers are keen to learn

Wine preferences vary by age

Opportunities continue to be seen ciders

Category Review – Non-alcoholic Beverages (at Home)

What you need to know

What it means

Moderate growth forecasted for beverage sales

Figure 27: Best- and worst-case forecast value sales of the non-alcoholic beverages (at home) market, at current prices, 2013-23

What to watch

Health-related positioning amplified thanks to recent revisions of Canada's Food Guide

Figure 28: Chocolate Partly Skimmed Ultrafiltered Milk (Canada, February 2019)

Testing the 'waters' with 'hybrid beverages'; how adventurous are Canadians?

Figure 29: Upruit Mint Grapefruit Sparkling Coffee (US, January 2018)

In-home beverage engagement suggests a broader challenge for the industry

Integrated foodservice and in-home experience key to engaging consumers

Figure 30: Category engagement – Non-alcoholic beverages, January 2019

Key consumer findings

Consider taking inspiration from the alcoholic beverage industry

Natural positioning continues to be important in beverage innovation

Figure 31: V8 +Energy White Grape & Raspberry Flavored Energy Drink (US, October 2017)

Figure 32: Diet Coke Twisted Mango Flavored Diet Soda (US, February 2018)

Sugar continues to be top of mind for consumers

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Canadian Lifestyles: The Cost of Convenience - Canada - April 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Category Review – Vacations and Tourism

What you need to know

What it means

Consumer spend on vacations will continue to see fair growth

Figure 33: Best- and worst-case forecast value sales of the vacations and tourism market, at current prices, 2013-23

What to watch

Low-cost airlines may help budget-concerned Canadians take off

Safety concerns may keep Canadians grounded

Canadians are keen on new experiences

Aspirations drive engagement

Figure 34: Category engagement – Vacations and tourism, January 2019

Key consumer findings

Alternative accommodations are making a splash

Travellers show an interest in more authentic local experiences

Theme parks continue to be a staple of family fun

Category Review – Leisure Spending (Local)

What you need to know

What it means

Leisure-related categories will need a bit more support moving into 2019

What to watch

Mixing it up: more blending of retail and foodservice to come

Food for function: more foodie options for commuters are likely on the horizon

Colour outside the lines: current positioning of arts and crafts is limiting growth potential

Retailers haven't reached their full potential in engaging Canadians with online shopping

Happiness is on display: buoy engagement by making emotional draws social

Figure 35: Category engagement – Leisure spending categories, January 2019

Key consumer findings

Seniors are a relatively untapped segment that is full of potential

Arts and crafts sectors will benefit from partnerships with foodservice vendors

Foodservice providers will gain by giving Canadians more reasons to celebrate

Experiential elements play an increasingly important role in driving traffic

Category Review – Health and Wellness

What you need to know

What it means

Consumer expenditure on BPC and OTC remain steady

What to watch

A (new and) notable rise of access to health and wellness experts 'on-demand'

Home is where the heart is? Fluidity in function of physical spaces is eroding a sense of belonging

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Canadian Lifestyles: The Cost of Convenience - Canada - April 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Good news for arts/crafts category: consumers turning to tactile experiences for stress relief

More 'outside' categories making the stretch to play in the wellness arena

Figure 36: #EatTogether 2017, December 2016

Figure 37: #EatTogether 2018, December 2017

Figure 38: #EatTogether 2019, December 2018

'On-the-go' BPC options will work to draw more engagement

Figure 39: Category engagement – Beauty products and personal care, January 2019

Key consumer findings

Moms are in need of some mental relief

Nourishing mental wellness through snacks

Consumers connect cooking to mental health benefits

The arts and crafts category stands to gain by highlighting wellness benefits

Category Review – Technology and Communications

What you need to know

What it means

Market growth depends on expansion instead of incremental innovation

Figure 40: Best- and worst-case forecast value sales of the technology and communications market, at current prices, 2013-23

What to watch

Anticipating the next tech product to go mainstream

A shift from ownership to access

An upcoming battle for subscription dollars

Predicting the success of foldable smartphones

Engagement in tech shows need for balance between innovation and simple messaging

Figure 41: Category engagement – Technology and communications, January 2019

Key consumer findings

Wearable technology is struggling to capitalize on its momentum

Smartphones are now the hub of travel technology

Video game viewership is on the rise

Free content is changing consumer expectations and disrupting the traditional paid market

Category Review – Transportation

What you need to know

What it means

A healthy state for the automotive category

Figure 42: Best- and worst-case forecast value sales of the transportation market, at current prices, 2013-23

What to watch

SUVs and crossovers are gaining ground

Safety is a staple consideration

Consumers are slightly less engaged in the car purchasing process

Figure 43: Category engagement – Automotive, January 2019

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Canadian Lifestyles: The Cost of Convenience - Canada - April 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Key consumer findings

Safety first! Canada's weather conditions keep safety features top of mind

Quebecers prefer smaller cars

Category Review – Personal Finance & Housing

What you need to know

What it means

Personal finance expenditure forecast to grow steadily

Figure 44: Best- and worst-case forecast value sales of personal financial services, at current prices, 2013-23

Housing market to experience slowing growth

Figure 45: Best- and worst-case forecast value sales of housing, at current prices, 2013-23

What to watch – Housing

Canada's new, tougher mortgage rules

Federal government faces pressure to help first-time homebuyers

Rental vacancy rate dips to 2.4% across Canada

What to watch – Personal finance and insurance

Blockchain and banking

Artificial intelligence and banking

The evolving world of telematics

Here's how insurers can prepare for driverless cars

Smart homes and insurance

Key consumer findings

Only 6% of Canadians are unbanked

Women continue to be less engaged in the financial industry

Rising cost of education makes student loans the top financial challenge

Lifestage is a key determinant of product ownership

Auto, home and life insurance have the highest ownership rates

Apart from mobile banking and money transfer, digital app usage is low

Almost half of renters view it as a lifestyle choice

The Consumer – What You Need to Know

Consumers are pulling back on discretionary spending

Commuting is a part of everyday life for most

Flexible work arrangements mean more people are out during the day

Consumers could use some help achieving balance

65% of Canadians are willing to pay for time-saving products or services

Perceived Financial Health and Discretionary Spending

Perception of financial situation softens slightly in 2019...

Figure 46: Perception of financial health, January/February 2015-19

...leading to some pull back in discretionary spending

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Canadian Lifestyles: The Cost of Convenience - Canada - April 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 47: How extra money is spent, January 2018-19

Rewards and enhanced/elevated experiences will count for more in 2019

Parents are of two minds when it comes to spending in 2019

Figure 48: How extra money is spent, mothers vs fathers, January 2019

Entertainment companies: consider prioritizing dads and 'layering' activities

Figure 49: Play Great Games Together – Nintendo Switch, May 2018

Chinese Canadians eye the long game, reward them for doing so

Figure 50: How extra money is spent, Chinese Canadians vs overall, January 2019

Spotlight on new immigrants

Less focus on debt, more focus on (cost-efficient) play

Figure 51: How extra money is spent, new immigrants vs overall, January 2019

New hope with new folks: less familiarity leads to greater engagement in more 'mundane' categories

Figure 52: Category engagement (any high engagement NET) – Select categories, January 2019

Work Locations and Commuting

A fifth of Canadians work at home some point work during the week

Figure 53: Work locations, January 2019

Offer the value of comfort in the context of work – Outside of traditional work places

Retailers outlets, malls and residential buildings could be good hosts

Offer the value of comfort in the context of work – Inside of traditional work places

Commuting is a part of everyday life for most

Figure 54: Commute time and method, January 2019

Younger Canadians have longer commutes, so be there

Figure 55: Commute time and method, by age, January 2019

Go with them: consider meeting them where they are – literally

Moms have shorter commutes, will seek solutions closer to home

Figure 56: Commute time, mothers vs fathers, January 2019

Think local but go social

Long commutes take a toll on Chinese Canadians

Figure 57: Commute time, Chinese Canadians vs overall, January 2019

Give guidance on the weekends

Areas Impacted on Work Days

Personal care and household chores are common struggles

Figure 58: Actively seeks time saving solutions for meals, often struggles with 'downtime', January 2019

Figure 59: Areas impacted on work days, January 2019

Direct communication channels will benefit drug stores and pharmacies

Sleep is a top area impacted for younger Canadians

Figure 60: Struggle with getting enough sleep on work days, 18-44s vs over-45s, January 2019

Consider ways to help, or at least not hinder, the right conditions for sleep

Parents with younger children feel short on personal and family time

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Canadian Lifestyles: The Cost of Convenience - Canada - April 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 61: Select areas impacted on work days, parents with under-12s at home vs overall, January 2019

Moms need help in the kitchen

Figure 62: 'I look for ways to help save time with meals', mothers with children under-18 at home vs overall, January 2019

Serving suggestion: convenience as the main dish, with a side of emotional benefits

Figure 63: Kung Pao Chicken – Longo's Fresh Meals in Minutes, November 2016

Figure 64: Nutella Appreciation 30, January 2019

Work-life Balance and Time Saving Behaviours

Work and life lines are blurring...

Figure 65: Perception of work-life balance, January 2019

...creating a hunger for time-saving products and services

Figure 66: Time saving attitudes and behaviours, January 2019

Leave nothing to the imagination, clearly show them the specific benefits

Figure 67: Mobile Order & Pay: Avoid the Line, May 2018

Figure 68: Make it McDelivery, January 2019

Figure 69: Make it McDelivery, January 2019

Parents with young children rely on tools to manage

Figure 70: Time saving attitudes and behaviours, parents with under-5s at home vs overall, January 2019

Find ways to set them up for success from before the fun begins

Chinese Canadians less likely to feel they have a healthy work-life balance

Figure 71: Perception of work-life balance, Chinese Canadians vs overall, January 2019

Chinese Canadians rely on resources and are willing to pay for them

Figure 72: Time saving attitudes and behaviours, Chinese Canadians vs overall, January 2019

Root personal care messaging to functionality to appeal to Chinese Canadians

Figure 73: Personal care related areas impacted on work days, Chinese Canadians vs overall, January 2019

Appendix – Data Sources and Abbreviations

Data sources

Fan chart forecast

Consumer survey data

Abbreviations and terms

Abbreviations

Terms

Appendix – Market

Figure 74: Total Canada sales and forecast of overall expenditures, at current prices, 2013-23

Figure 75: Total Canada sales and forecast of food (at home), at current prices, 2013-23

Figure 76: Total Canada sales and forecast of food – Dining out market, at current prices, 2013-23

Figure 77: Total Canada sales and forecast of alcoholic beverages (at home) market, at current prices, 2013-23

Figure 78: Total Canada sales and forecast of alcoholic beverages (out of home) market, at current prices, 2013-23

Figure 79: Total Canada sales and forecast of non-alcoholic beverages (at home) market, at current prices, 2013-23

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Canadian Lifestyles: The Cost of Convenience - Canada - April 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 80: Total Canada sales and forecast of beauty and personal care market, at current prices, 2013-23

Figure 81: Total Canada sales and forecast of OTC healthcare remedies market, at current prices, 2013-23

Figure 82: Total Canada sales and forecast of household care market, at current prices, 2013-23

Figure 83: Total Canada sales and forecast of clothing, footwear and accessories market, at current prices, 2013-23

Figure 84: Total Canada sales and forecast of technology and communications market, at current prices, 2013-23

Figure 85: Total Canada sales and forecast of vacations and tourism market, at current prices, 2013-23

Figure 86: Total Canada sales and forecast of leisure and entertainment market, at current prices, 2013-23

Figure 87: Total Canada sales and forecast of home and garden market, at current prices, 2013-23

Figure 88: Total Canada sales and forecast of transportation market, at current prices, 2013-23

Figure 89: Total Canada sales and forecast of financial services market, at current prices, 2013-23

Figure 90: Total Canada sales and forecast of housing market, at current prices, 2013-23

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com