

Consumer Economic Pulse: Monitoring Uncertainty

WAVE #4 – AUGUST 2022

angus reid group
questions that matter

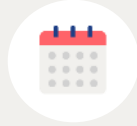


| Methodology



Study

With inflation surging to a four-decade high amidst a slow economic recovery from the effects of the COVID-19 pandemic, the Angus Reid Group has launched this tracker to understand Canadians' purchasing behaviours and perceptions of the economy.



Field dates

Wave 1: May 19-24, 2022
Wave 2: June 20-22, 2022
Wave 3: July 19-21, 2022
Wave 4: August 18-22, 2022



Sample

Wave 1: n=1,530
Wave 2: n=1,503
Wave 3: n=1,503
Wave 4: n=1,508

For this wave, a nationally representative sample of n=1,508 Canadian Adults (age 18+ yrs.) who are members of the Angus Reid Forum. The sample frame was balanced and weighted on age, gender, region and education according to the latest census data. For comparison purposes only, a probability sample of this size would yield a margin or error of +/- 2.5 percentage points, 19 times out of 20.



Next fielding date

September 2022

| 4 Things You Need to Know

1 Canadians Are Increasingly Convinced the Country is Already in a Recession

The gap continues to narrow between Canadians who believe we are heading into a recession (44%) and those who feel we are already in one (33%). Concerns around inflation and the cost of living remain high, and there has been little change in Canadians' ability to save over the last month, or in their household expenses since January.

3 Leisure travel at its highest in 12 months

Despite many Canadians planning to cut back on travel spending in 2022, half took a leisure trip in August before the end of summer. Canadians have cut back on discretionary spending in other areas, with a notable decrease in spend on clothing. There has also been an increase in investments, both overall and for RRSPs and

2 Canadians remain concerned about the future state of the economy (although less so)

Year-over-year inflation dropped to 7.6% in July, after the month of June where it reached its highest rate since 1983. While 44% are still pessimistic about the economy one year from now, this is a stark decrease from 57% seen just two months ago. That said, the worst is not yet behind us as half of Canadians feel that the inflation rate will increase over the next six months.

4 Increases in back-to-school spending and cuts to holiday spending

More than half of students/parents of students anticipate spending more on back-to-school supplies this year. The biggest increases are expected to be on food/snacks, clothing/shoes, and school supplies.

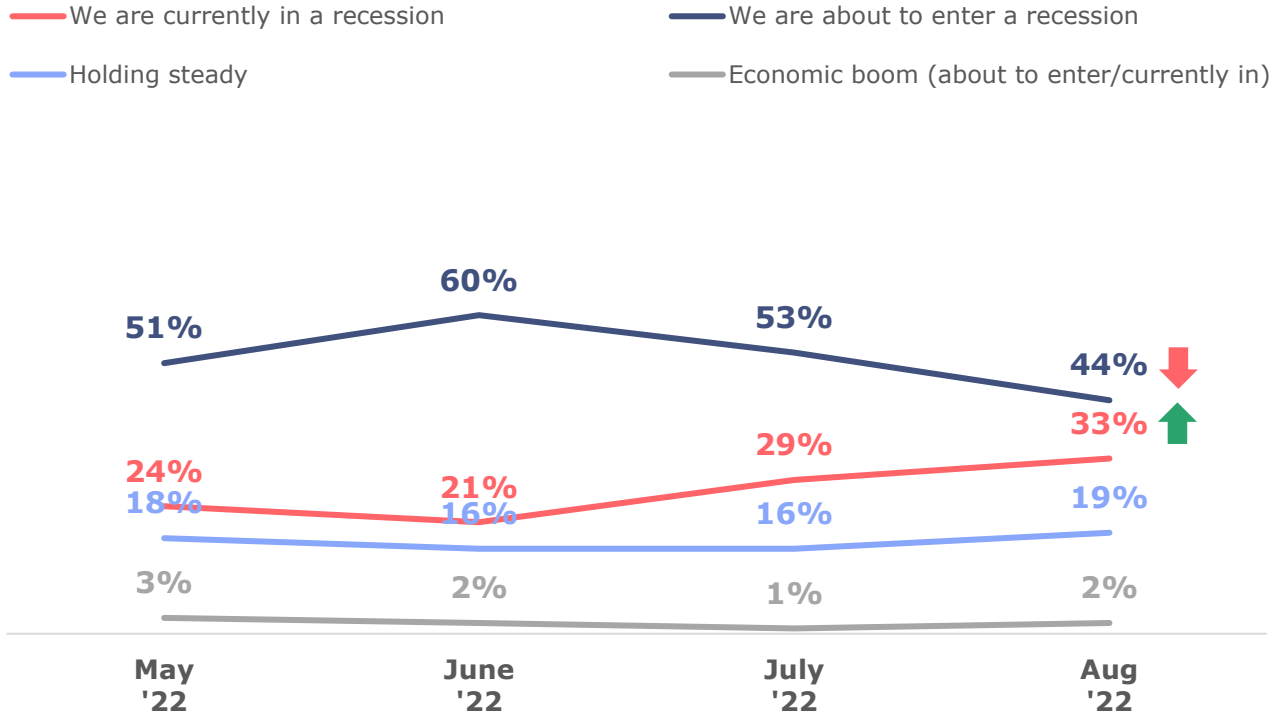
However, with the holiday still months away, one-half of Canadians indicate they will be spending less this holiday season compared to last year.



Perspective on the Economy



| Current State of the Economy



ANALYSIS

- There has been a notable shift in the proportion of Canadians who believe we are about to enter a recession over the last month. Belief that Canada is about to enter a recession has translated into the belief that Canada is “currently in a recession”.
- Atlantic Canada remains the only region to maintain that the economy is holding steady (30%).

AUGUST 18-22, 2022

We are currently in a recession

33%

We are about to enter a recession

44%

The economy is neither in a recession nor a boom – we are holding steady

19%

We are coming out of a recession

2%

We are about to enter an economic boom

1%

We are currently in an economic boom

0

**NET
77%**

**NET
2%**

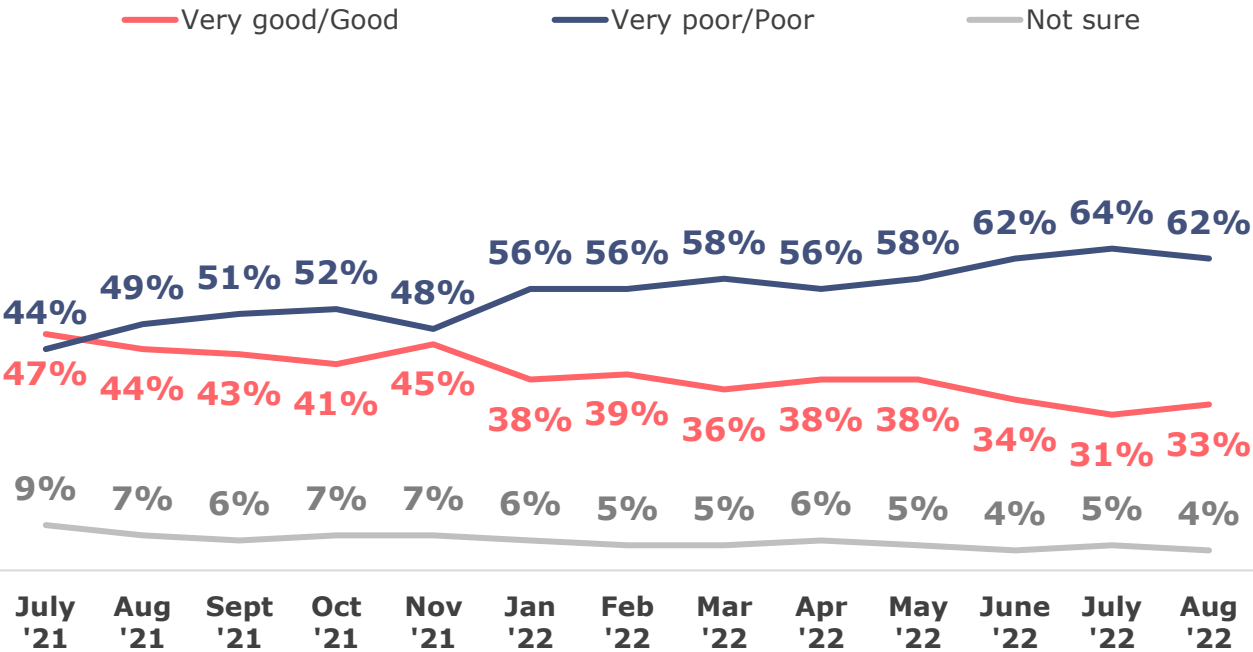
77%

of Canadians believe that we are currently in or headed towards a recession.

↓ 5 percentage points since July



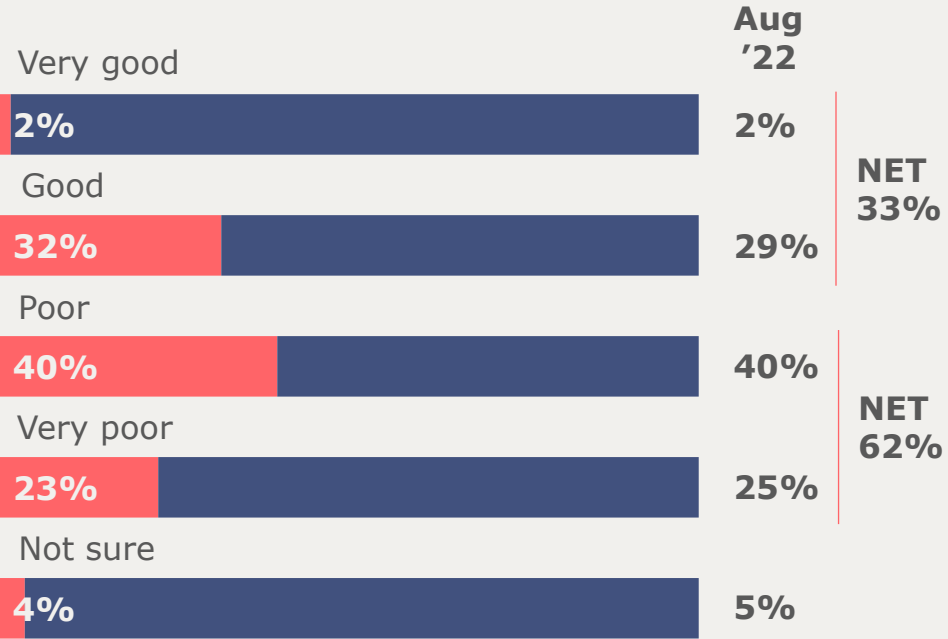
Perceptions of the Canadian Economy



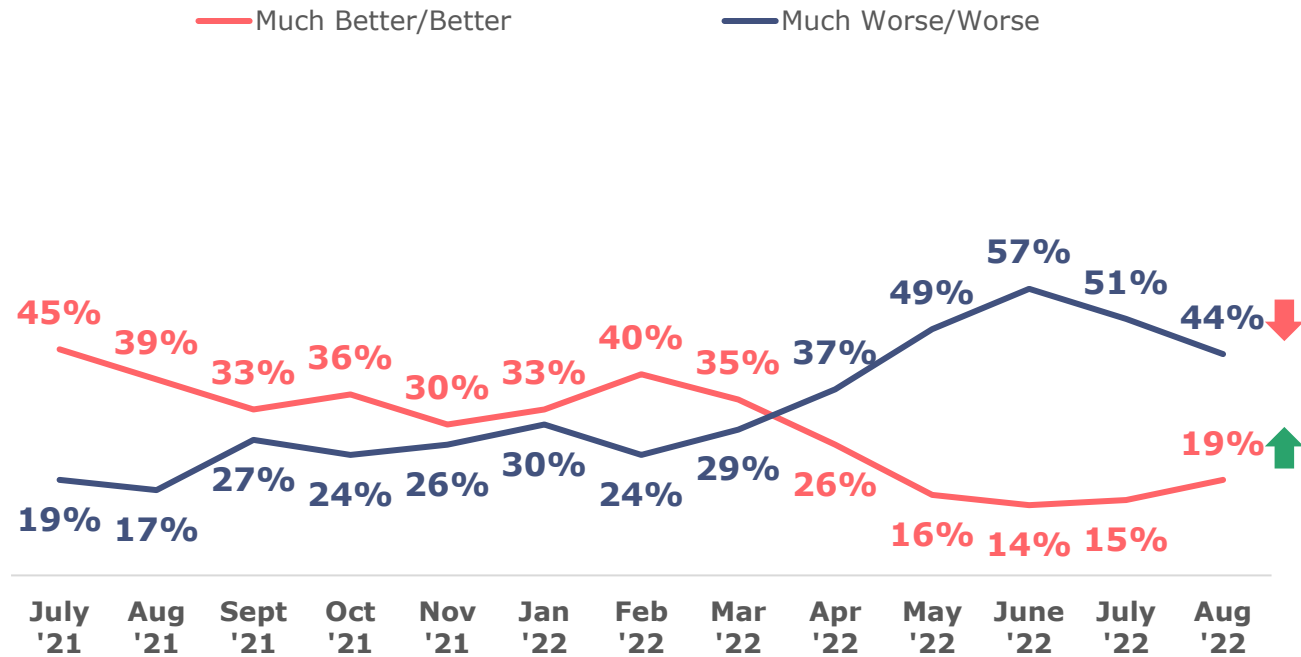
ANALYSIS

- Poor perceptions of the Canadian economy have generally plateaued this month, with little change in positive vs. negative perceptions in August.
- Older Canadians (55+) and men continue to be somewhat more positive about the state of the economy (both at 38%), while higher income households (\$50k+) are generally more positive than lower income households (<\$50k).

AUGUST 18-22, 2022



Projections of the Canadian Economy a Year from Now



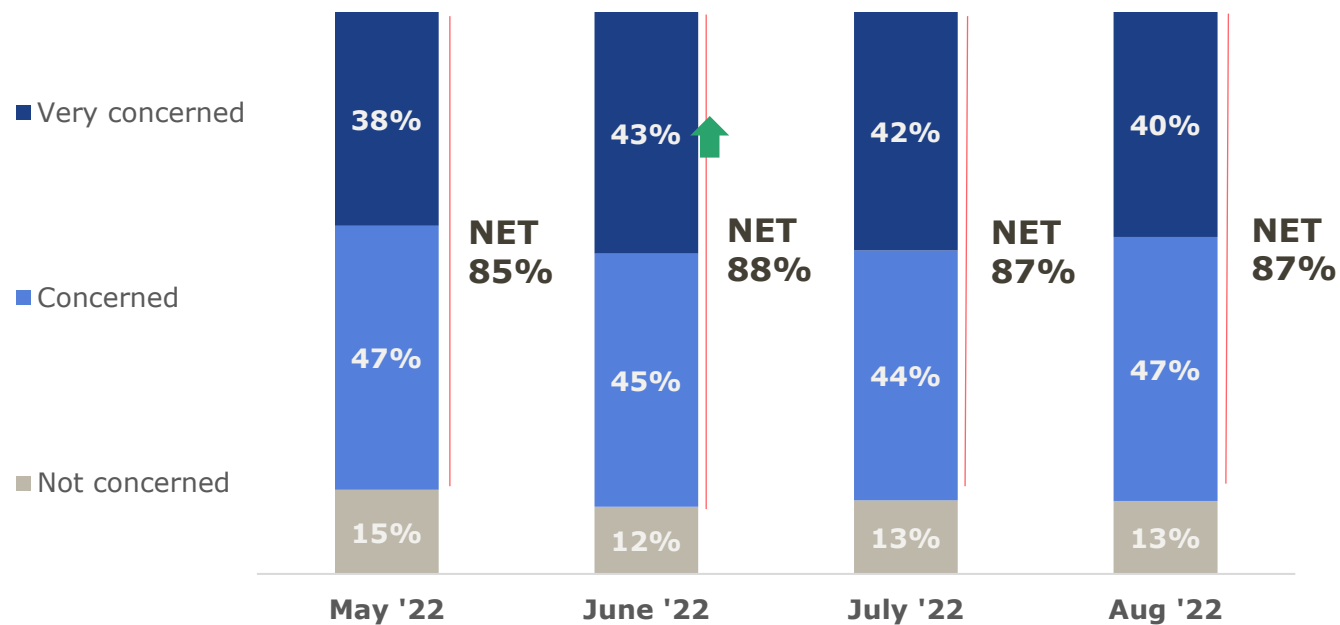
ANALYSIS

- Though it has tempered significantly from one month ago, public pessimism about the future of the Canadian economy remains high, with two-in-five Canadians believing the economy will be worse a year from now.
- Roughly half (48%) of younger Canadians (18-54) believe the economy will be worse a year from now, compared to only 37 percent of those 55+.
- Quebec and Atlantic Canada are far less pessimistic about the economy than the rest of the country.

AUGUST 18-22, 2022



Level of Concern About Canadian Economy



ANALYSIS

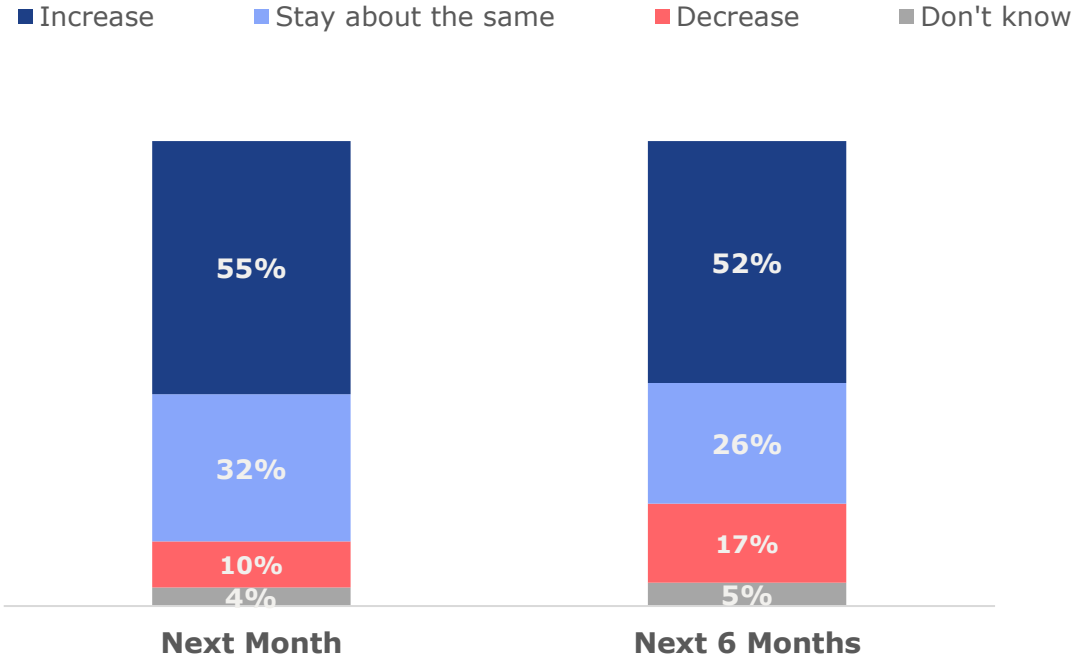
- Levels of overall concern about the economy have remained more or less on par with July.
- Residents of Quebec (32%) and Atlantic Canada (31%) are far less likely to be very concerned about the Canadian economy, compared to half in Alberta (50%) and the Prairies (54%), and two-in-five residents of BC (43%) and Ontario (42%).

AUGUST 18-22, 2022



Across most regions, age groups and household income levels, roughly four-in-five Canadians express concern about the current state of the national economy

| Anticipated Change in Inflation



ANALYSIS

- Women (58%) and BIPOC Canadians (61%) are more inclined to believe that the inflation rate will increase over the next month.
- Men, higher income households (\$100k+) (23%, respectively) and older Canadians (55+) (21%) are more inclined to believe that the inflation rate will decrease over the next six months.

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55%

of Canadians believe that the inflation rate will increase over the course of the month.

52%

of Canadians believe that the inflation rate will increase over the course of the next six months.

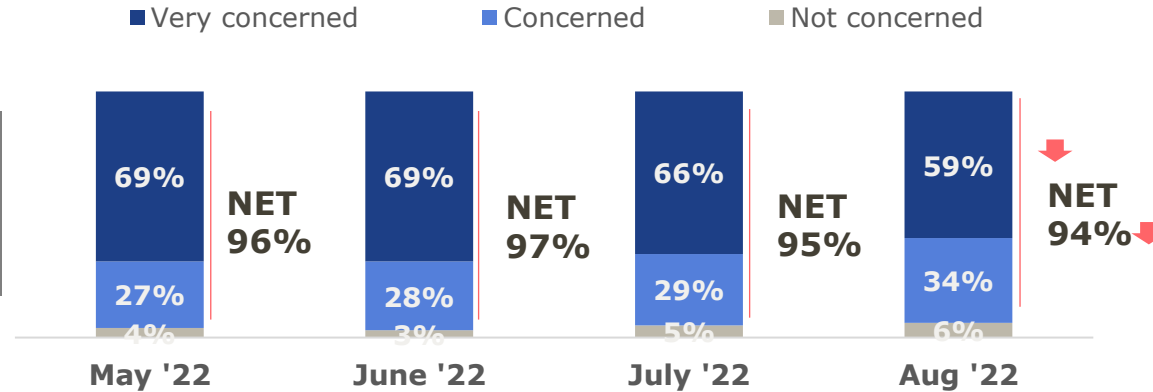
Personal Finances



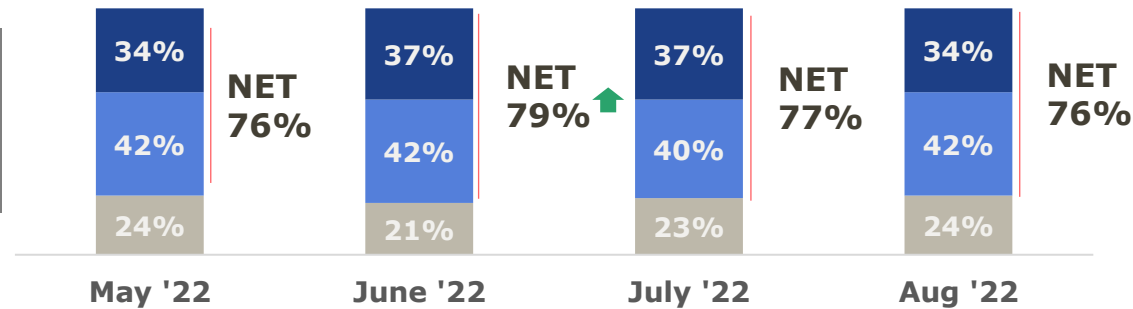
| Level of Financial Concern

AUGUST 18-22, 2022

Inflation/
Cost Of Living



Your Personal
Finances



Nearly all Canadians (94%) are concerned about inflation and the cost of living, including three-in-five (59%) who describe themselves as very concerned. Residents of Alberta (70%) remain the most likely to feel this way.

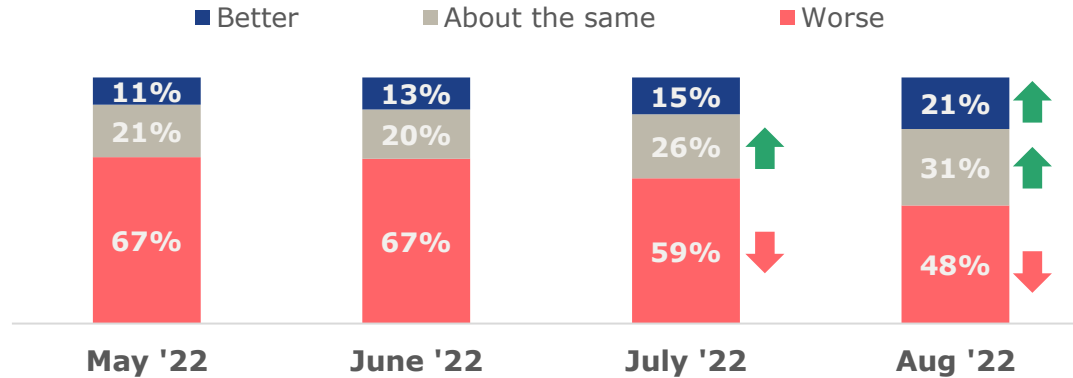
ANALYSIS

- Residents of Alberta are *very concerned* about their personal finances (45% vs. 33% in the rest of the country).
- Nearly half (45%) of lower-income Canadians (<\$50k) are very concerned about their personal financial situation, compared to only one quarter (23%) of higher-income Canadians (\$100k+).
- BIPOC Canadians are significantly more likely than white Canadians to be very concerned about their personal finances (42% vs. 32%, respectively).

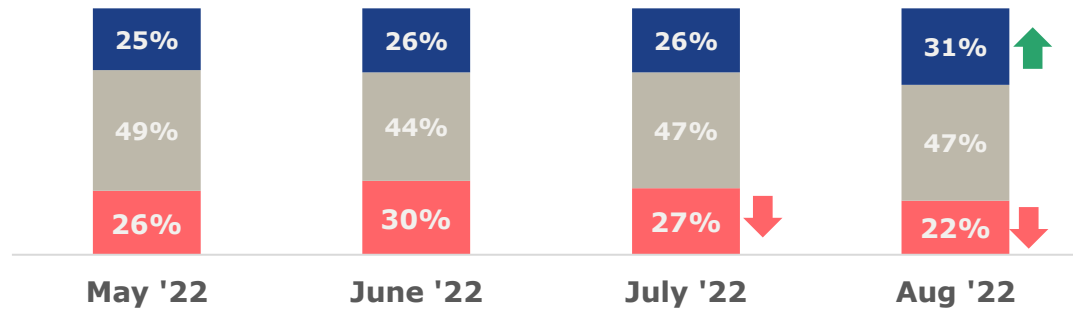
Projections a Year from Now

AUGUST 18-22, 2022

Inflation/
Cost Of Living



Your Personal
Finances



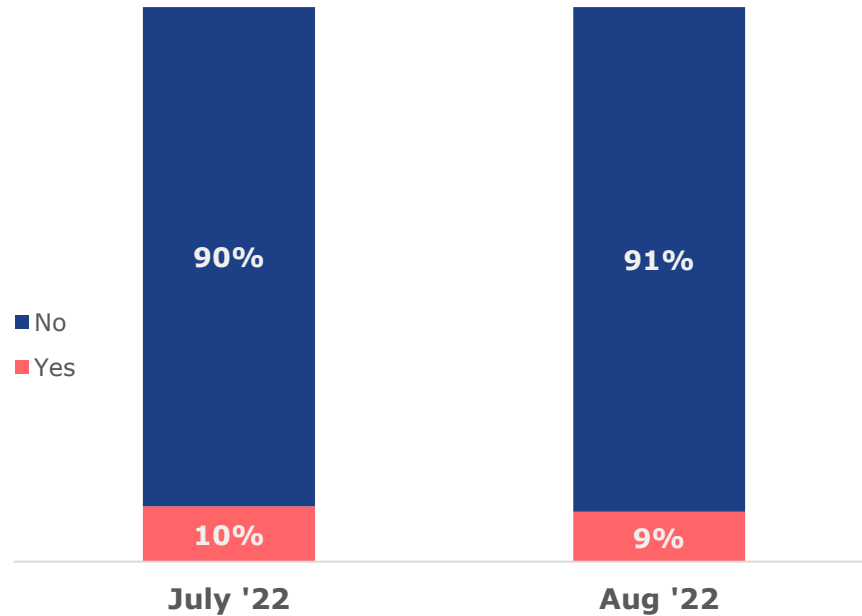
Though Canadians are decidedly more positive about their personal finances and inflation/cost of living than one month ago, roughly one-half (48%) remain concerned about inflation and the cost of living a year from now.

ANALYSIS

- Young Canadians (18-34) are nearly *twice as likely* as older Canadians (55+) to believe their personal financial situation will be better a year from now (39% vs. 22%, respectively).
- Roughly three-in-ten (27%) lower income households (<\$50k) are concerned about their personal financial situation a year from now, compared to one-in-ten (12%) higher income Canadians (\$100k+).

| Gig Economy Engagement

AUGUST 18-22, 2022



One-in-ten (9%) employed Canadians have engaged in the “gig economy” in the past month

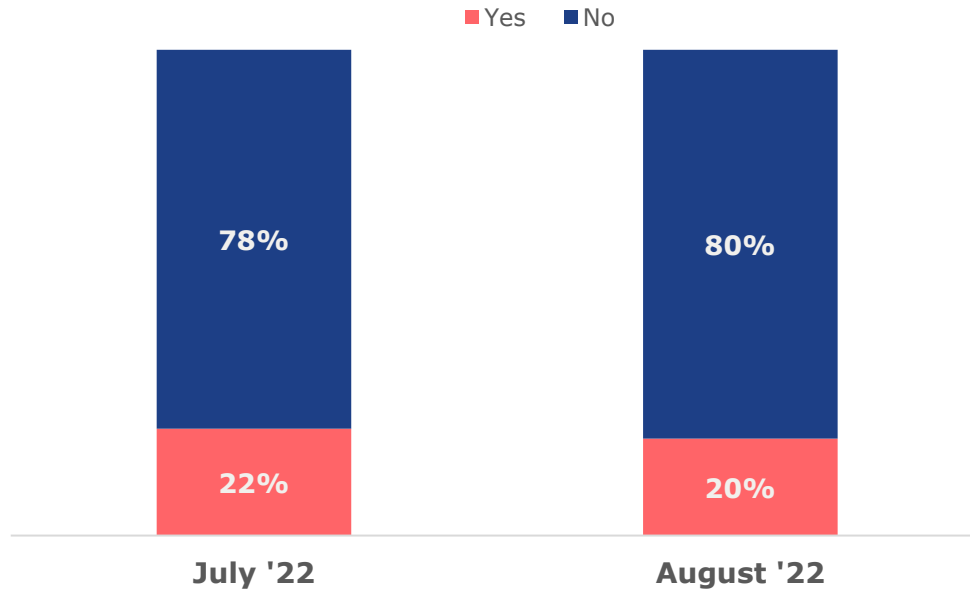
ANALYSIS

- Young Canadians (18-34) are *twice as likely* as those 35+ to work in the “gig economy” in addition to their primary employment (14% vs. 8%, respectively).
- BIPOC are *three times more likely* than white Canadians to work in the “gig economy” (14% vs. 5%, respectively).



| Side Business Ownership

AUGUST 18-22, 2022



Two-in-ten (20%) employed Canadians run a side business, down significantly from before the pandemic three years ago.

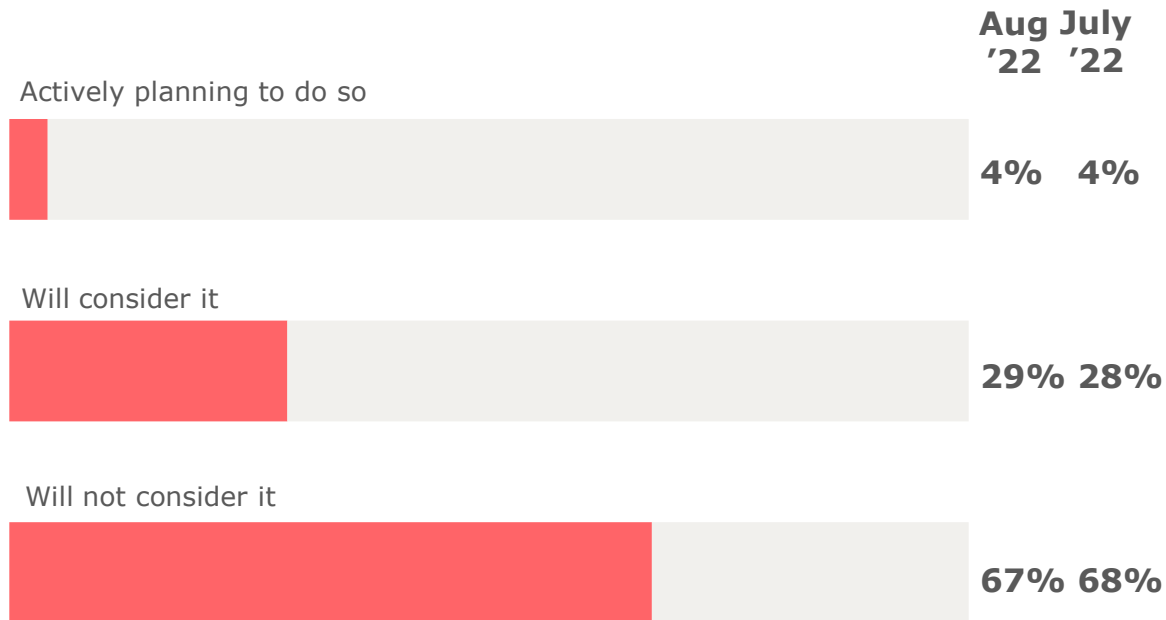
ANALYSIS

- Workers in Quebec are the least likely to manage a side business (13%, vs. 22% in the rest of the country).
- One-in-three (29%) BIPOC workers own a side business in addition to their primary employment, compared to just one-in-five (18%) white workers.



Business Start-Up Likelihood

In the Next 12 to 18 Months



ANALYSIS

- Not only are workers in Quebec least likely to own a side business, but they are also least likely to consider starting one in the 12-18 months (76%, vs. 64% in the rest of the country).
- Two-in-five (39%) young workers (18-34) are considering or actively planning to start a side business in the next 12-18 months, compared to only 27 percent of those 35+.



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Among Canadian workers that do not already own a side business, a third (33%) are considering or actively planning to start one in the next 12-18 months

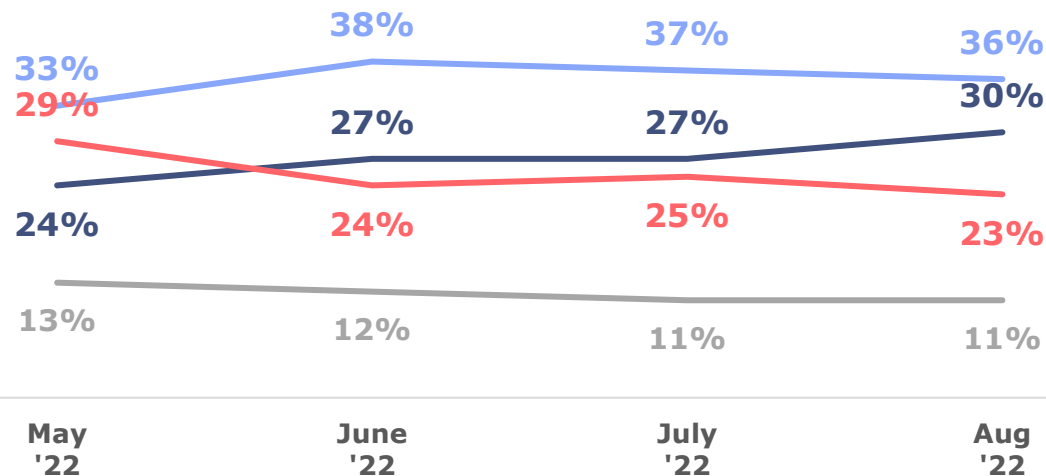
Affordability/ Personal Spending Habits



Ability to Afford Household Expenses

Finances over the Past Month

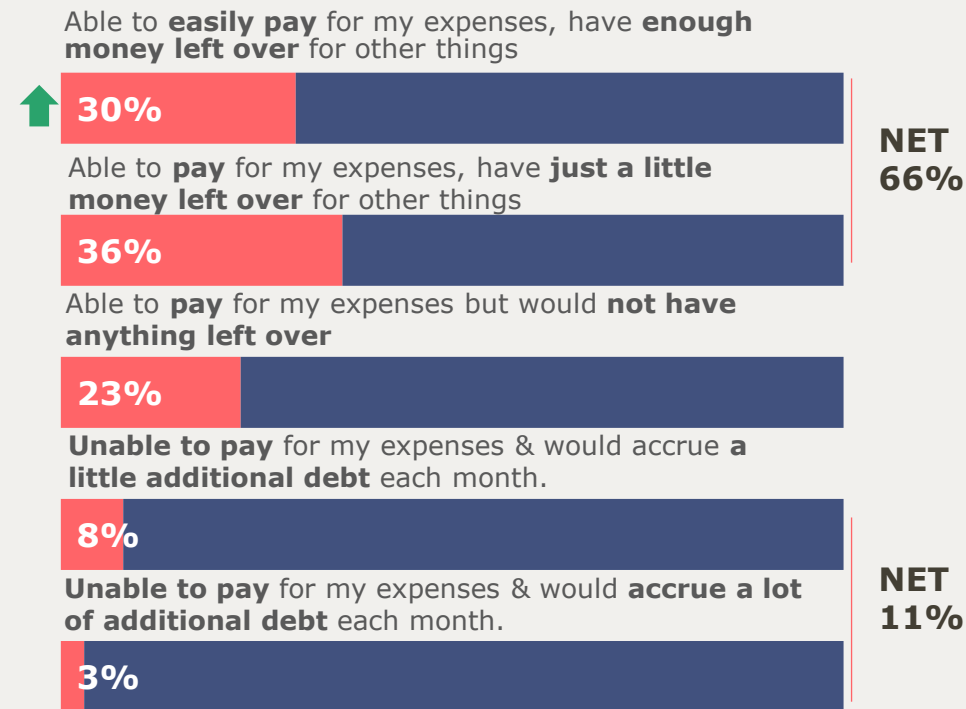
— Easily pay, enough left over
— Able to pay, just a little left over
— Able to pay, but nothing left over
— Unable to pay



ANALYSIS

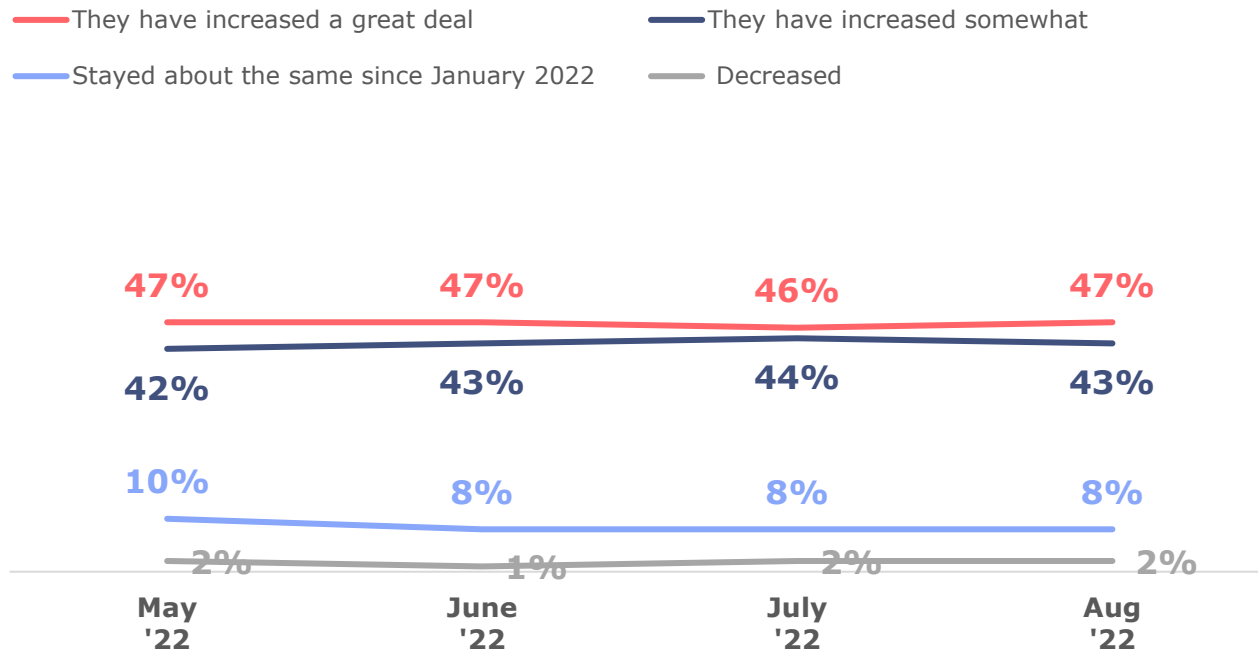
- Changes in overall affordability appear to have improved slightly this month with one-third of Canadians able to easily cover expenses with some left over (+3 percentage points).
- Canadians aged 35-54 are least likely to say they could easily afford their household expenses over the past month, with money left over for other things (22%, vs. 28% of those 18-34 and 39% of those 55+).

AUGUST 18-22, 2022



17% of low-income households (<\$50k), and 12% of medium-income households (\$50k-\$100k) were unable to afford their expenses in the past month, more than twice the proportion (6%) of high-income households (\$100k+).

Change in Household Expenses Since January



ANALYSIS

- More than half of Albertans and lower-income households (<\$50k), 23% respectively, report that their household expenses have increased “a great deal” since the start of the year.

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They have increased a great deal

47%

They have increased somewhat

43%

They have stayed about the same since January 2022

8%

Decreased (somewhat + a great deal)

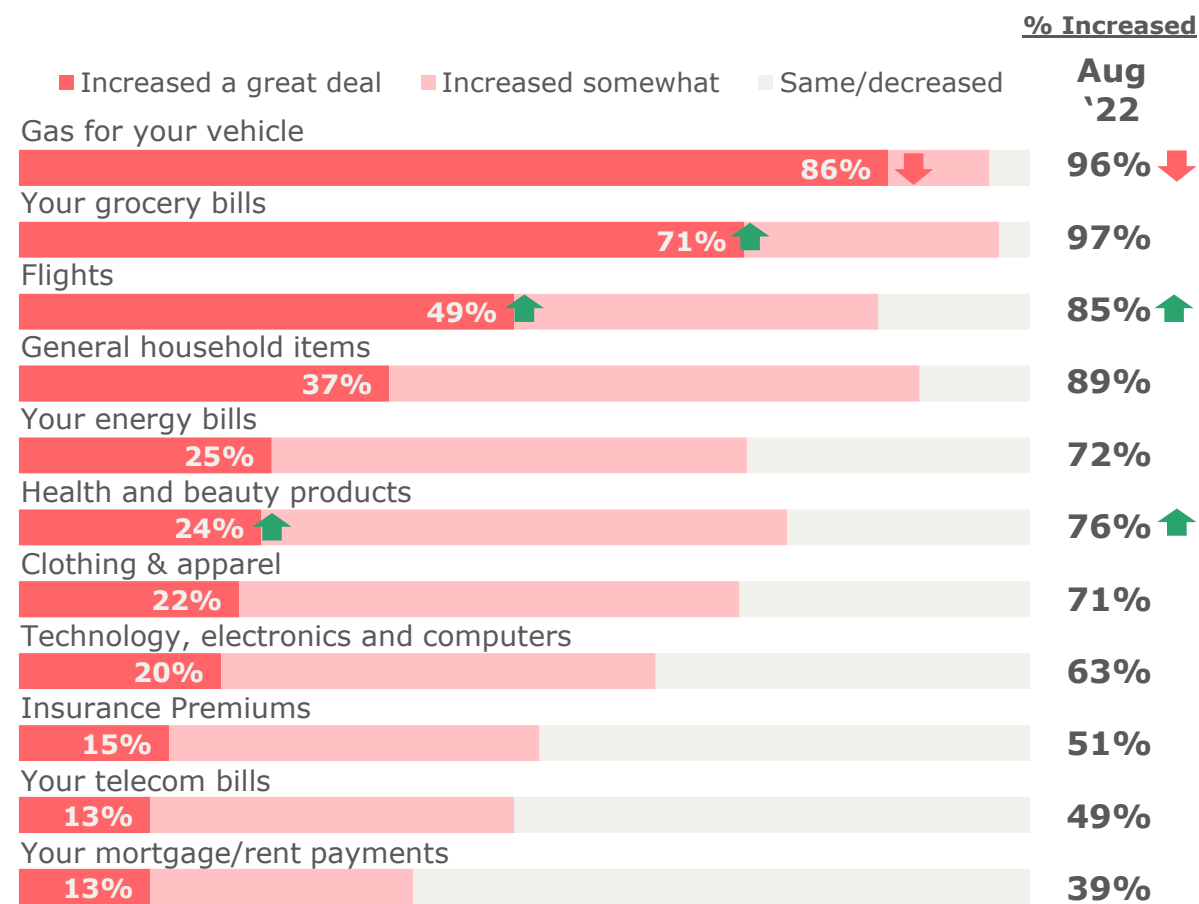
2%

**NET
90%**

90%

of Canadians have seen an increase in their household expenses since January 2022.

Greatest Change in Expenses



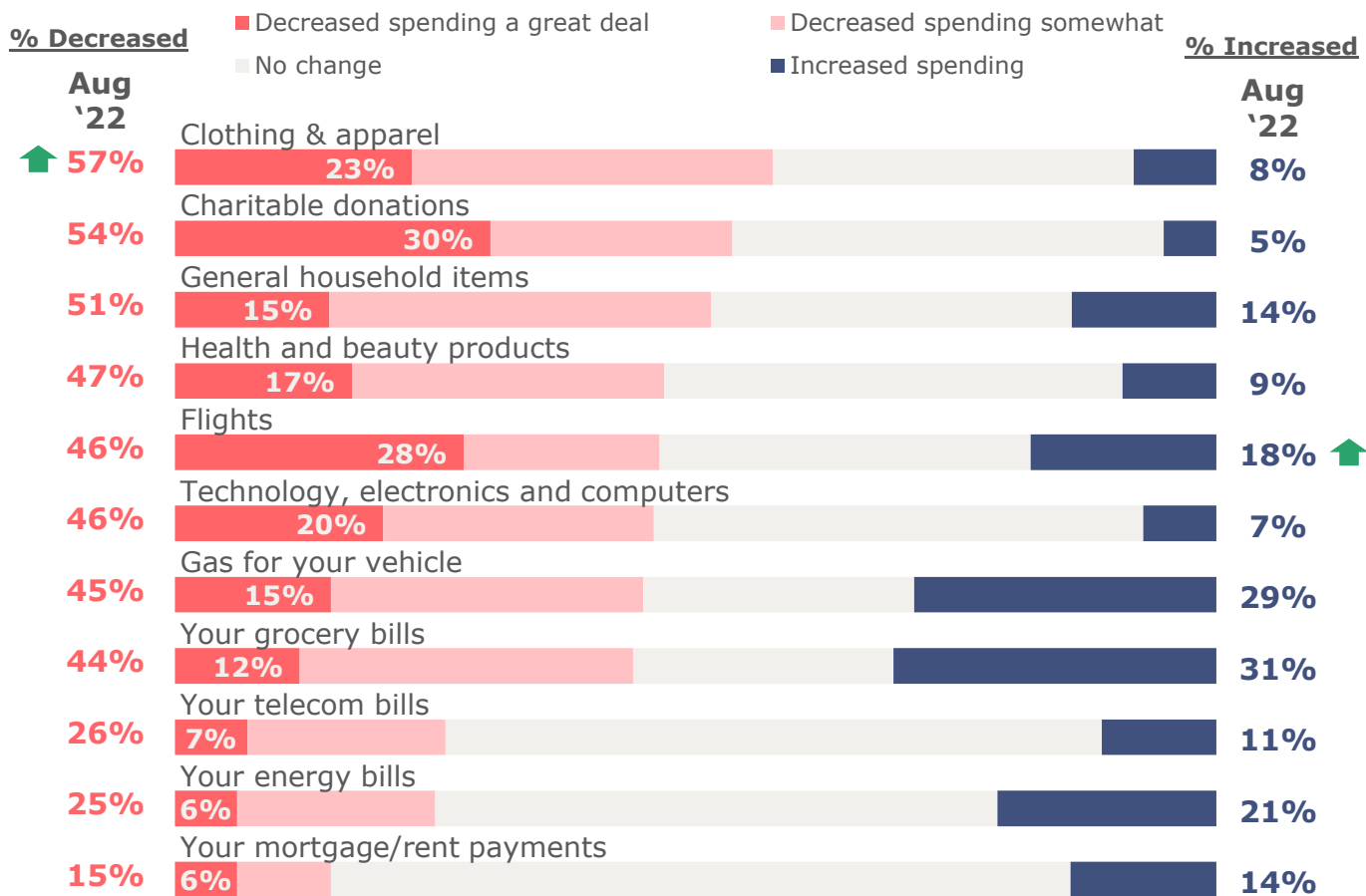
ANALYSIS

- Albertans remain the *most likely* region in Canada to say their energy bills have significantly increased since the start of the year (54% vs. 20%, respectively).

AUGUST 18-22, 2022

	% Increased			
	Aug '22	July '22	June '22	May '22
Gas for your vehicle	↓ 96%	98%	98%	98%
Your grocery bills	97%	96%	97%	96%
Flights	↑ 85%	80%	83%	75%
General household items	89%	89%	88%	88%
Your energy bills	72%	68%	69%	71%
Health and beauty products	↑ 76%	71%	70%	69%
Clothing & apparel	71%	69%	69%	66%
Technology, electronics and computers	63%	62%	62%	60%
Insurance Premiums	51%	49%	52%	47%
Your telecom bills	49%	46%	45%	47%
Your mortgage/rent payments	39%	40%	38%	34%

Changes in Spending on Expenses



ANALYSIS

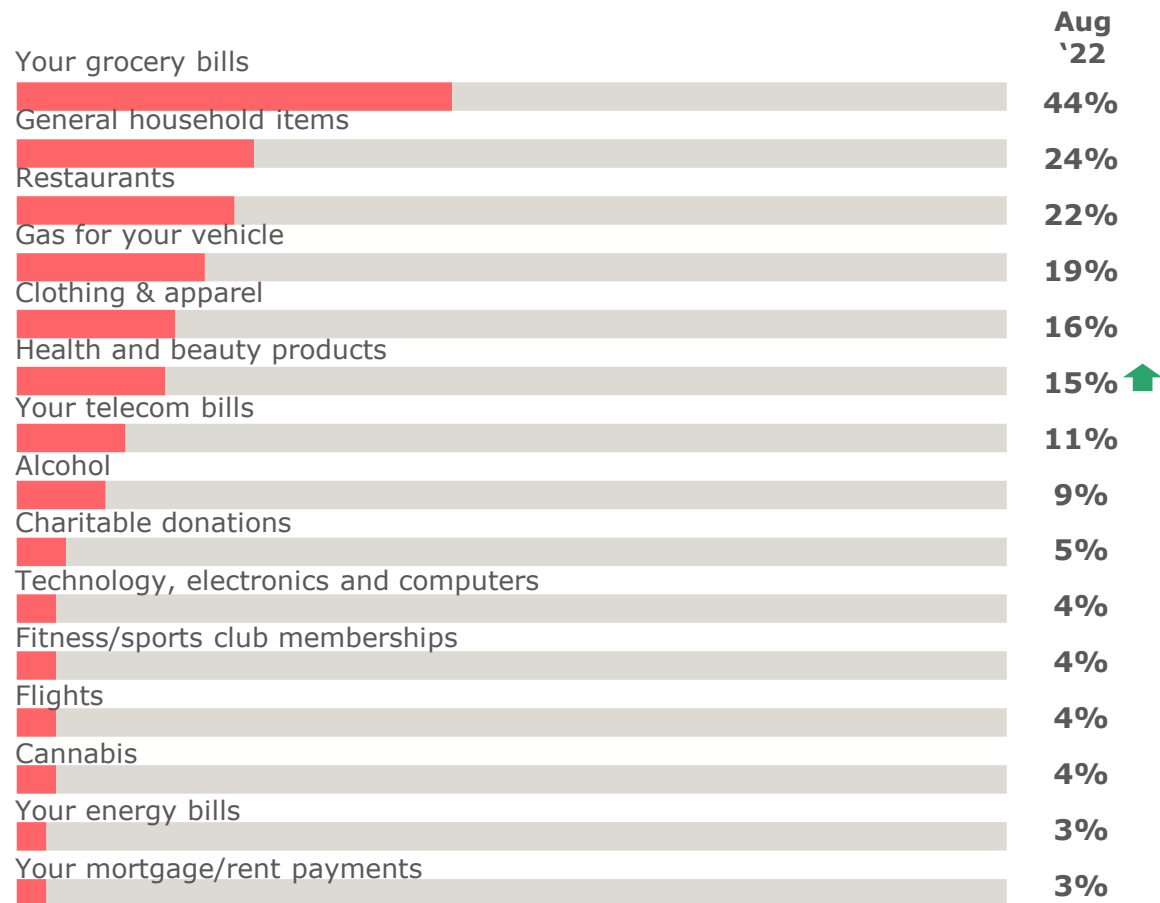
- Lower-income households (<\$50k) have cut expenses across spending categories.
- Women continue to be significantly more likely than men to have made spending cuts on clothing (62% vs. 52%), general household items (56% vs. 47%), health & beauty products (52% vs. 41%), and gas (49% vs. 41%).
- Two-in-five (37%) Albertans have increased their spending on energy bills since the start of the year, nearly twice the proportion in the rest of the country (20%).

AUGUST 18-22, 2022

% Increased	Aug '22	July '22	June '22	May '22
Clothing & apparel	8%	7%	8%	7%
Charitable donations	5%	5%	5%	5%
General household items	14%	14%	15%	14%
Health and beauty products	9%	7%	9%	7%
Flights	18%	13%	17%	13%
Technology, electronics and computers	7%	6%	7%	7%
Gas for your vehicle	29%	29%	34%	32%
Your grocery bills	31%	34%	35%	32%
Your telecom bills	11%	11%	10%	11%
Your energy bills	21%	19%	20%	21%
Your mortgage/rent payments	14%	17%	16%	13%

% Decreased	Aug '22	July '22	June '22	May '22
Clothing & apparel	57%	53%	54%	55%
Charitable donations	54%	52%	50%	52%
General household items	51%	50%	48%	51%
Health and beauty products	47%	48%	45%	47%
Flights	46%	45%	41%	46%
Technology, electronics and computers	46%	43%	39%	44%
Gas for your vehicle	45%	46%	43%	46%
Your grocery bills	44%	42%	40%	43%
Your telecom bills	26%	24%	22%	21%
Your energy bills	25%	24%	25%	25%
Your mortgage/rent payments	15%	16%	14%	15%

Change in Brands to Save Money



ANALYSIS

- Quebecois are *most likely* to have changed restaurant brands to save money on dining out (34%, vs. 18% nationally).
- Fewer than half (46%) of high-income households (\$100k+) have switched brands since the start of the year to save money, compared to three-in-five (64%) low-income households (<\$50k).

Base:
TOTAL (n=1,508)

Q: Since the start of the year, have you switched to a different brand/company than you usually purchase from to save money in any of the following areas?

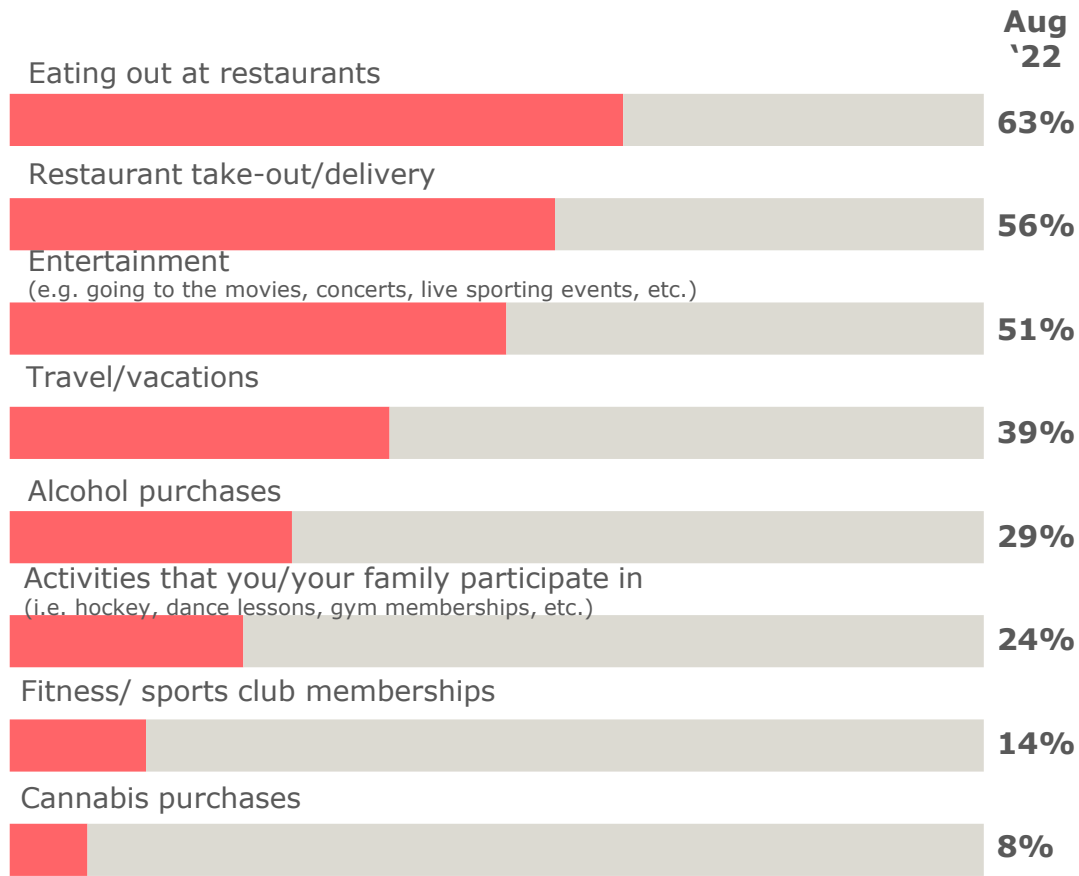
AUGUST 18-22, 2022

60%

of Canadians have switched brands in at least one area in order to save money. This increases to three-in-five among 18-34 year olds (67%), BIPOC (65%) and lower-income households (64%)

	Aug '22	July '22	June '22	May '22
Your grocery bills	44%	41%	40%	38%
General household items	24%	21%	21%	20%
Restaurants	22%	20%	20%	20%
Gas for your vehicle	19%	20%	19%	18%
Clothing & apparel	16%	14%	12%	14%
Health and beauty products	↑ 15%	11%	12%	11%
Your telecom bills	11%	10%	9%	7%
Alcohol	9%	8%	7%	8%
Charitable donations	5%	4%	4%	5%
Technology, electronics and computers	4%	4%	3%	4%
Fitness/sports club memberships	4%	4%	3%	4%
Flights	4%	4%	3%	3%
Cannabis	4%	3%	4%	4%
Your energy bills	3%	3%	3%	3%
Your mortgage/rent payments	3%	2%	2%	2%

Decrease in Discretionary Activities



ANALYSIS

- Canadians aged 18-54 are significantly more likely to have reduced their spending on entertainment, travel, family activities, fitness/sports club memberships, restaurant takeout/delivery, alcohol and cannabis.
- Albertans are more likely to have reduced spending on restaurants, entertainment, family activities and fitness memberships.

AUGUST 18-22, 2022

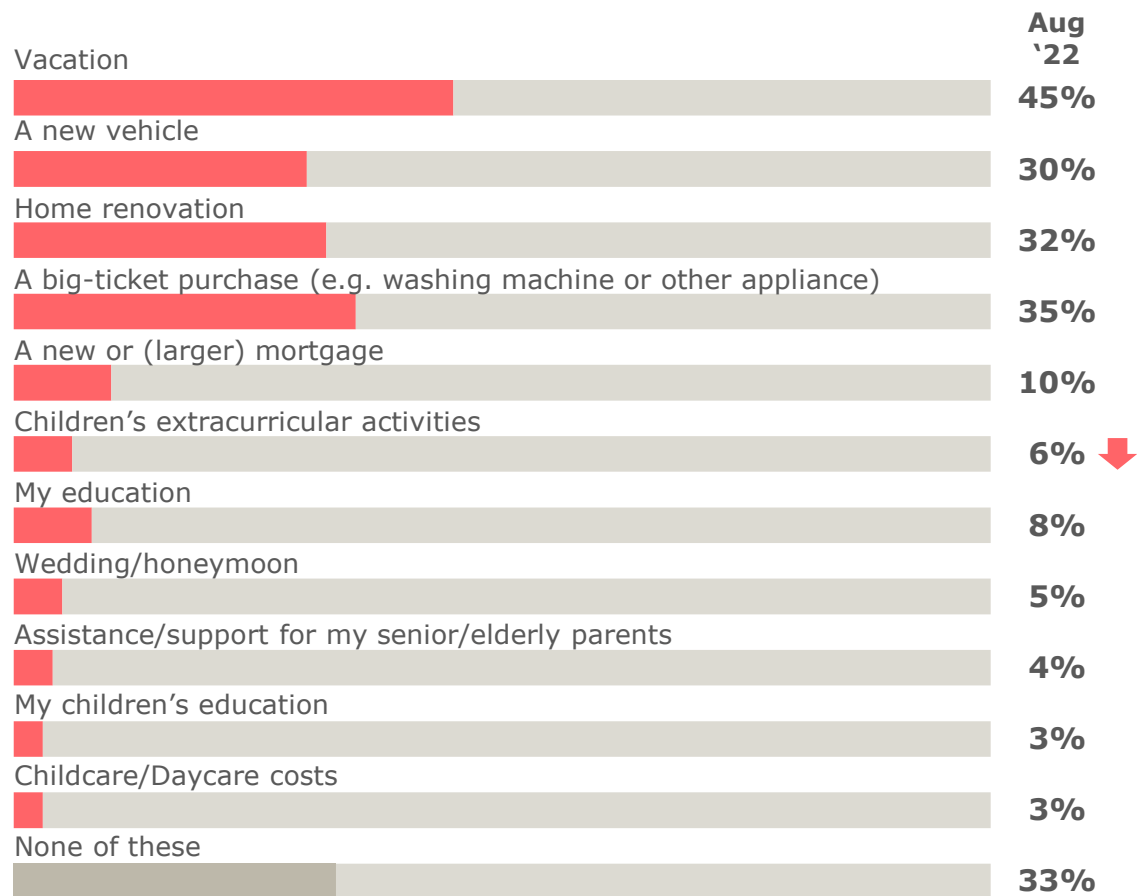
80%

of Canadians have reduced their non-essential activities and spending in order to save money since January 2022.

↑ 4 percentage points since June

	Aug '22	July '22	June '22	May '22
Eating out at restaurants	63%	63%	62%	62%
Restaurant take-out/delivery	56%	56%	55%	56%
Entertainment (e.g. going to the movies, concerts, live sporting events, etc.)	51%	51%	49%	50%
Travel/vacations	39%	37%	36%	35%
Alcohol purchases	29%	29%	31%	29%
Activities that you/your family participate in (i.e. hockey, dance lessons, gym memberships, etc.)	24%	24%	23%	25%
Fitness/ sports club memberships	14%	13%	12%	14%
Cannabis purchases	8%	8%	9%	9%

Planned Financial Cutbacks this Year



ANALYSIS

- Canadians under 55 are significantly more likely than those 55+ to be making at least one major financial cutback this year (71% vs. 59%, respectively).
- More than half (56%) of Albertans have cut back or plan to cut back on vacations this year, by far the highest rate in the country. Albertans are twice as likely as the rest of Canada to have planned education cutbacks this year (13% vs. 7%, Nationally)

AUGUST 18-22, 2022

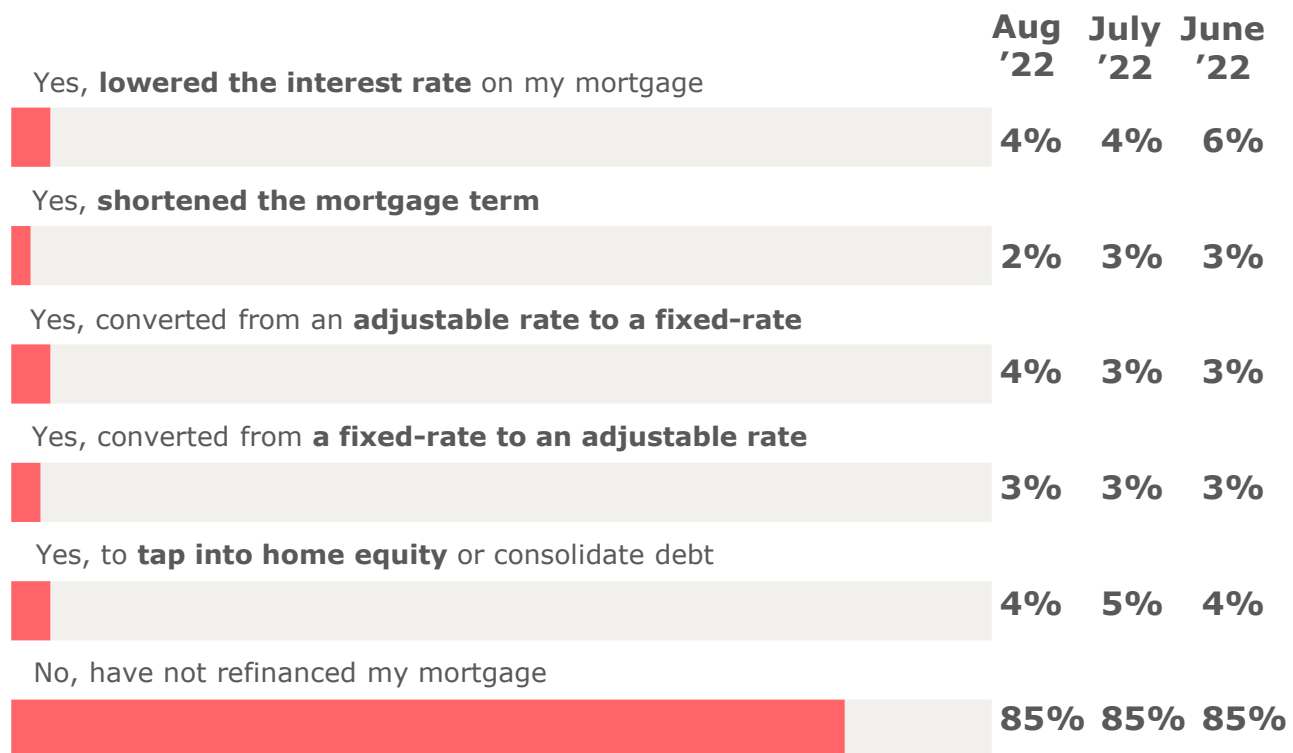
67%

of Canadians are planning to cut back on major purchases, education or activities this year. This increases to 75% among Canadians aged 35-54.

	Aug '22	July '22	June '22	May '22
Vacation	45%	48%	47%	48%
A new vehicle	30%	30%	30%	30%
Home renovation	32%	34%	33%	33%
A big-ticket purchase (e.g. washing machine or other appliance)	35%	32%	34%	34%
A new or (larger) mortgage	10%	9%	8%	10%
Children's extracurricular activities	6% ↓	8%	7%	8%
My education	8%	7%	8%	7%
Wedding/honeymoon	5%	5%	5%	5%
Assistance/support for my senior/elderly parents	4%	5%	4%	5%
My children's education	3%	4%	4%	4%
Childcare/Daycare costs	3%	3%	4%	4%
None of these	33%	33%	33%	32%

Mortgage Refinancing

Since the start of 2022 (among Canadians with mortgage)



ANALYSIS

- Young Canadians (18-34) are *six times more likely* as those 35+ to have shortened their mortgage term since January (6% vs. 1%, respectively). They are twice as likely to have taken a refinancing action on their mortgage (23% vs. 13%, among 35+)
- Nearly one-in-ten (8%) lower-income households(<\$50k) have tapped into their home equity or consolidated their debt.

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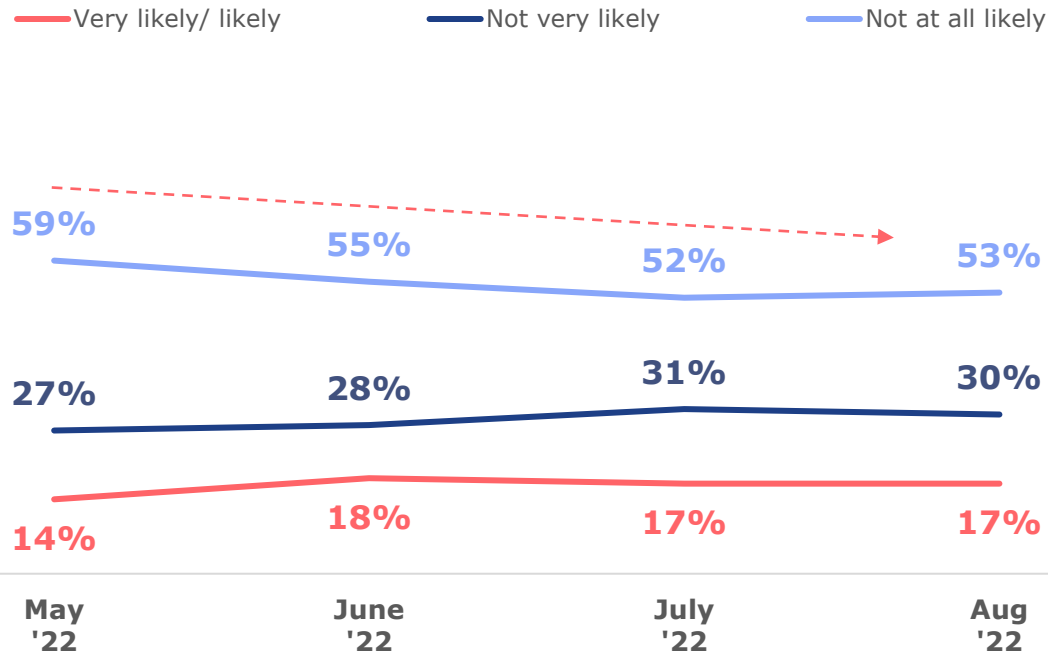
15%

of Canadians with a mortgage have refinanced since the start of the year.

Telecom



Likelihood of Purchasing New Mobile Phone



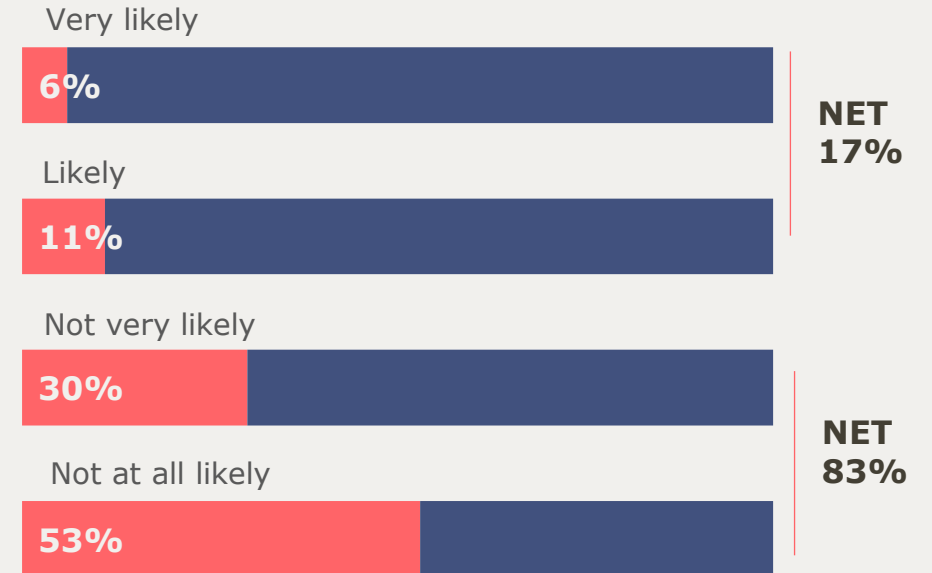
ANALYSIS

- Those who have a positive view of the Canadian economy are three times more likely as those who have a poor opinion to say it's likely they will purchase a new phone over the next few months (27% vs. 9%, respectively).
- Canadians aged 18-34 are most likely to consider purchasing a new phone over the next few months (22%).

Base:
TOTAL (n=1,508)

Q: How likely are you to purchase a new mobile phone over the next few months?
*small sample size

AUGUST 18-22, 2022



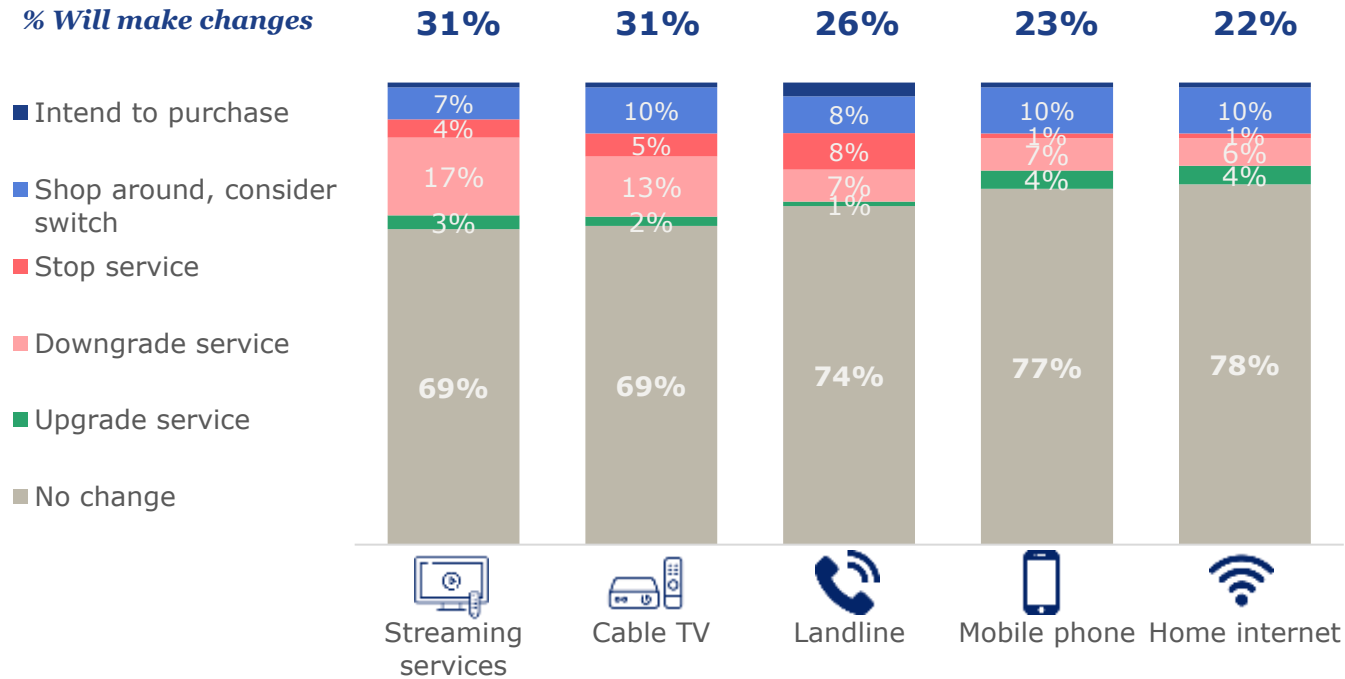
17%

of Canadians are **likely to purchase** a new mobile phone in the next few months.

↑ **3 percentage points** since May

| Changes to Home Telecom

AUGUST 18-22, 2022



23%

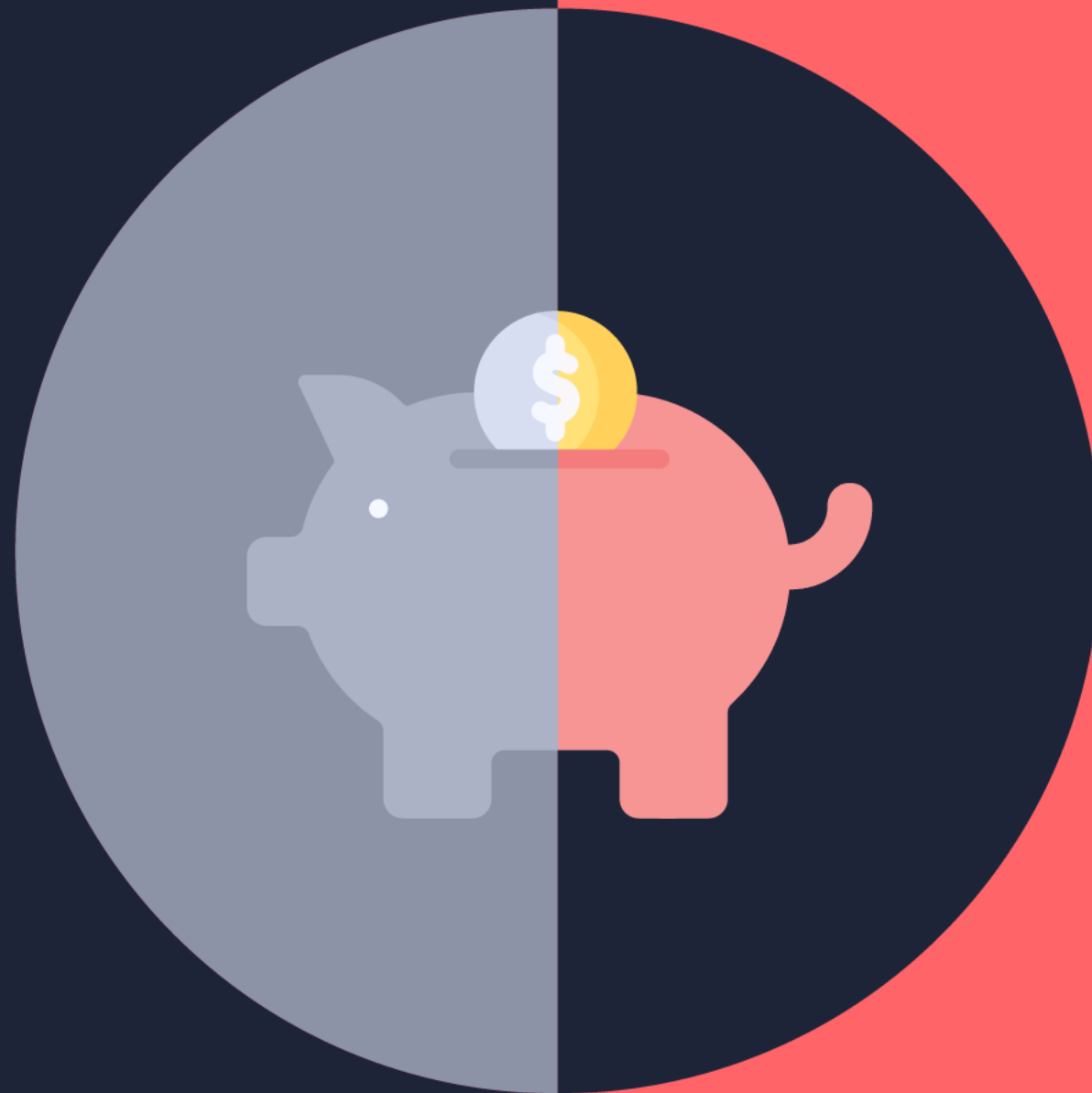
of Canadians anticipate making changes to their mobile phone service within the next two months.

↑ **3 percentage points** since May

ANALYSIS

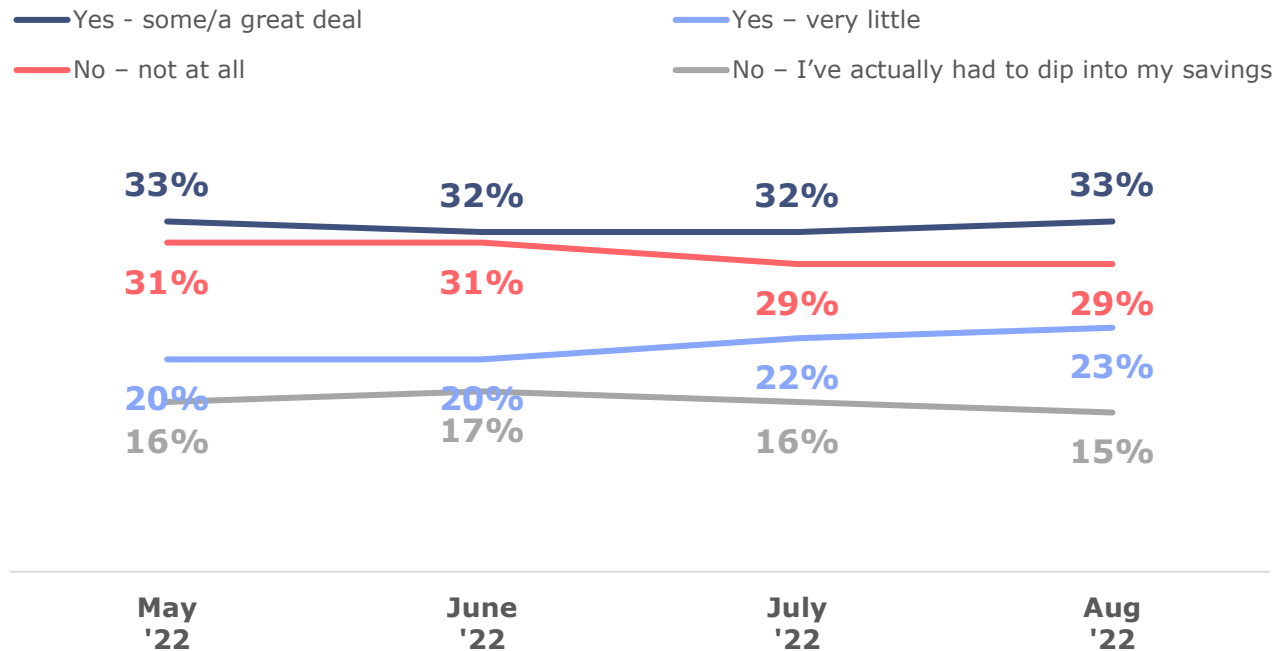
- Canadians under 55 are significantly more likely to anticipate making changes to their streaming (37%) and cable TV subscriptions (36%), generally to downgrade or outright cancel these services.
- Across all telecom services, older Canadians (55+) are least likely to anticipate making changes to their subscriptions/plans.

Finances



Ability to Save Money

Past Month



ANALYSIS

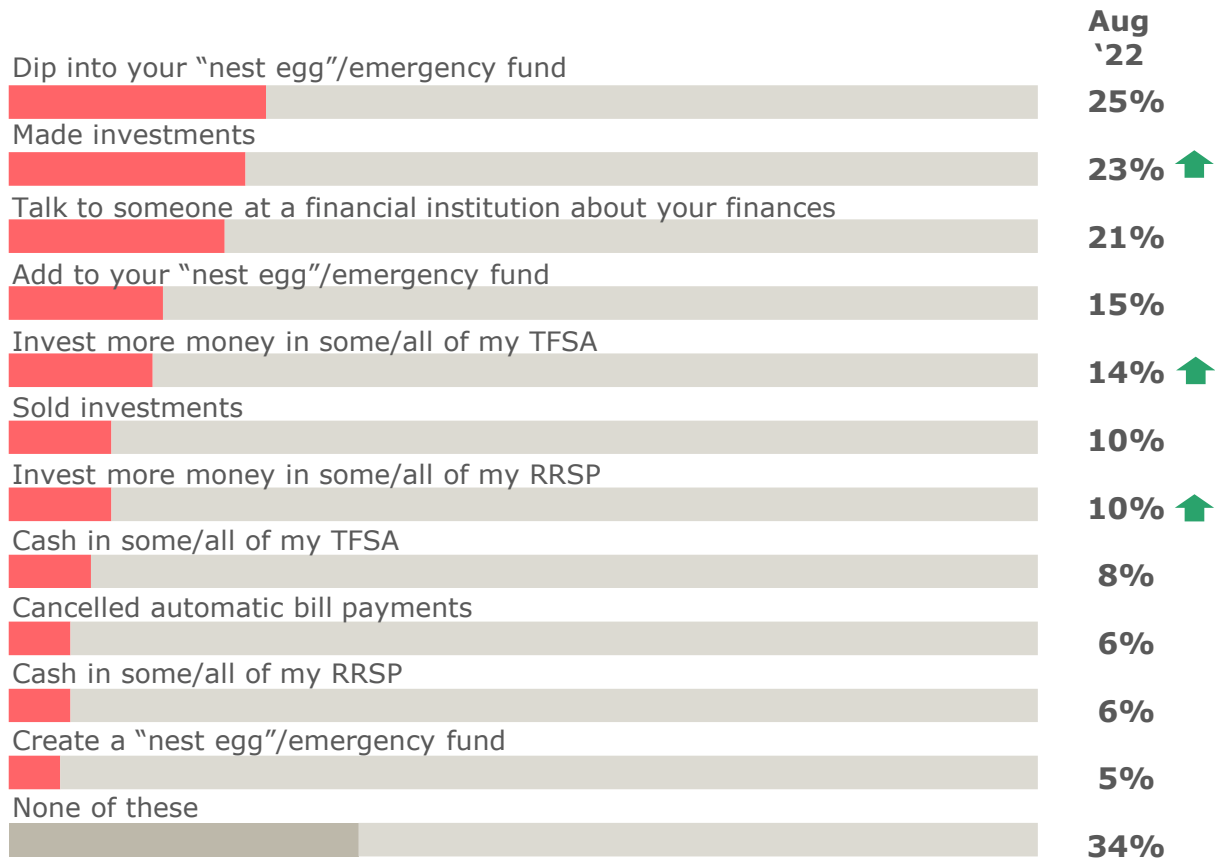
- Two-thirds (61%) of young Canadians (18-34) were able to save money over the past month, compared to only half of Canadians (54%) aged 55+.
- Seven-in-ten (70%) high-income Canadians (\$100k+) were able to save or invest in the past month, compared to 57% of those making \$50k - <\$100k annually and just 41% of lower-income households (<\$50k).
- Residents of Alberta, Ontario and the Atlantic, were twice as likely as those who reside in BC or Quebec, to have to dip into savings in the past month.

AUGUST 18-22, 2022



Savings/Investment Actions

Past Month



ANALYSIS

- Over the past month, a quarter of Canadians had to dip into their "nest egg"/emergency fund, rising to three-in-ten (31%) among those aged 18-34, and 33% in Alberta.

AUGUST 18-22, 2022

34% of high-income Canadians (\$100k+) made investments over the past month, nearly three times the proportion (13%) of low-income Canadians (<\$50k)

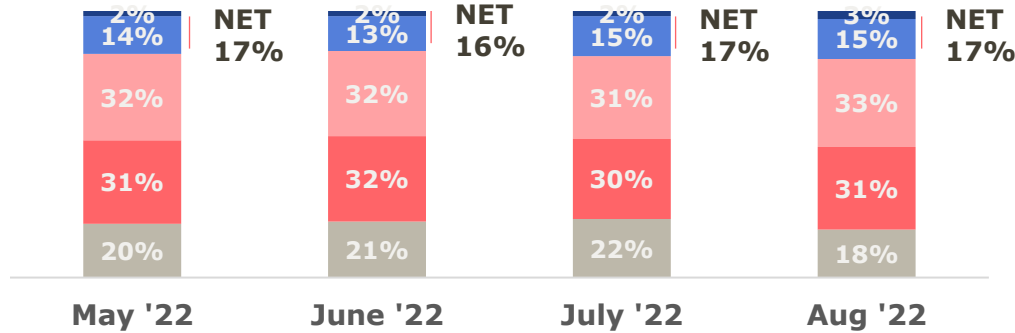
	Aug '22	July '22	June '22	May '22
Dip into your "nest egg"/emergency fund	25%	24%	24%	26%
Made investments	↑ 23%	19%	19%	19%
Talk to someone at a financial institution about your finances	21%	20%	19%	21%
Add to your "nest egg"/emergency fund	15%	13%	13%	12%
Invest more money in some/all of my TFSA	↑ 14%	11%	11%	11%
Sold investments	10%	8%	9%	10%
Invest more money in some/all of my RRSP	↑ 10%	8%	8%	10%
Cash in some/all of my TFSA	8%	7%	9%	8%
Cancelled automatic bill payments	6%	6%	6%	7%
Cash in some/all of my RRSP	6%	5%	5%	6%
Create a "nest egg"/emergency fund	5%	4%	3%	4%
None of these	34%	36%	36%	35%

| Agreement with Financial Statements

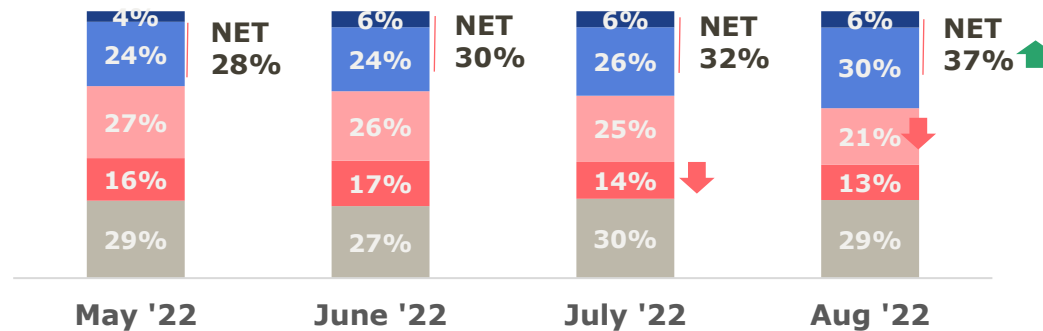
AUGUST 18-22, 2022

■ Strongly agree ■ Agree ■ Disagree ■ Strongly disagree ■ Not sure

My bank/financial institution **has my back** while inflation/cost of living continues to rise



It's **a great time** to make investments now

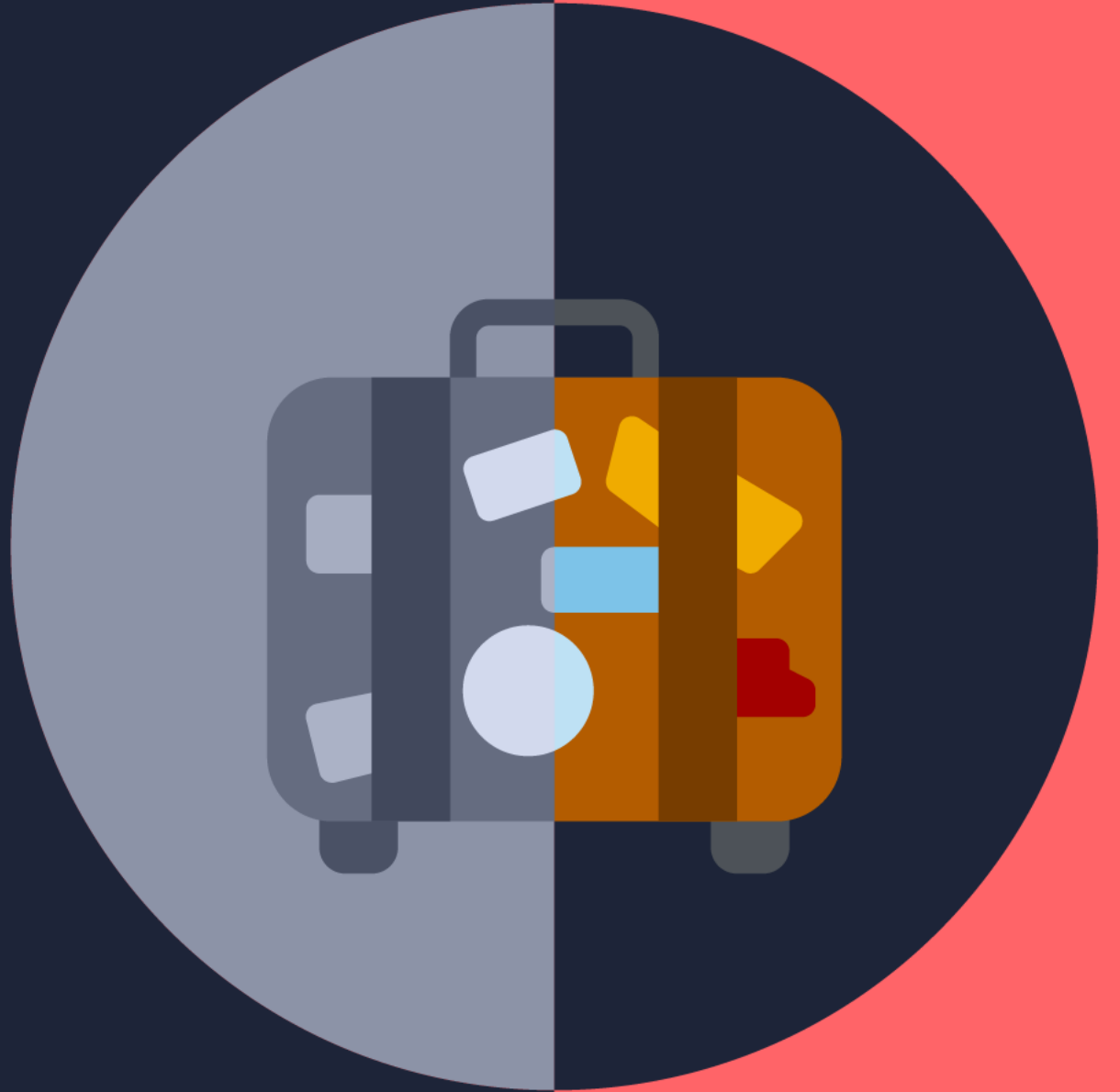


Half (51%) of high-income households (\$100k+), men (46%) and Canadians under the age of 55 (39%) believe that now is a great time to invest.

ANALYSIS

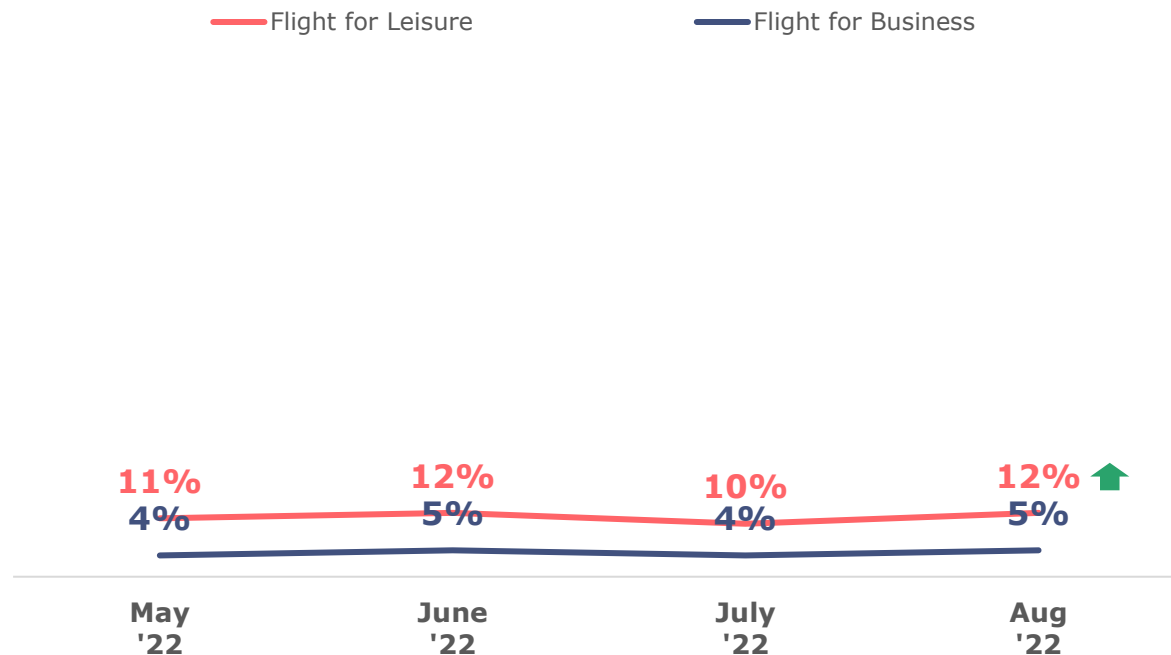
- Canadians who have a positive view of the Canadian economy are more inclined to believe that their bank will have their back during this inflationary period (27% vs. 13% of those with a negative view of the economy), and that it is a good time to make investments right now (50% vs. 31%).

Travel



Business/Leisure Flights

% Have Taken a Flight in the Last Month



ANALYSIS

- Younger Canadians (18-54) and high-income households (\$100k+) are most likely to have taken a flight in the past month (19% and 22%, respectively)

AUGUST 18-22, 2022 Type of Travel in Past Month

15%

of Canadians have taken a flight in the last month



Flight for leisure within Canada



Flight for leisure to the U.S.



Flight for leisure outside of Canada/U.S.



Flight for business within Canada



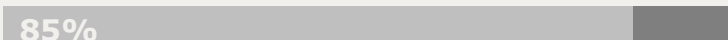
Flight for business to the U.S.



Flight for business outside of Canada/U.S.



None of the above

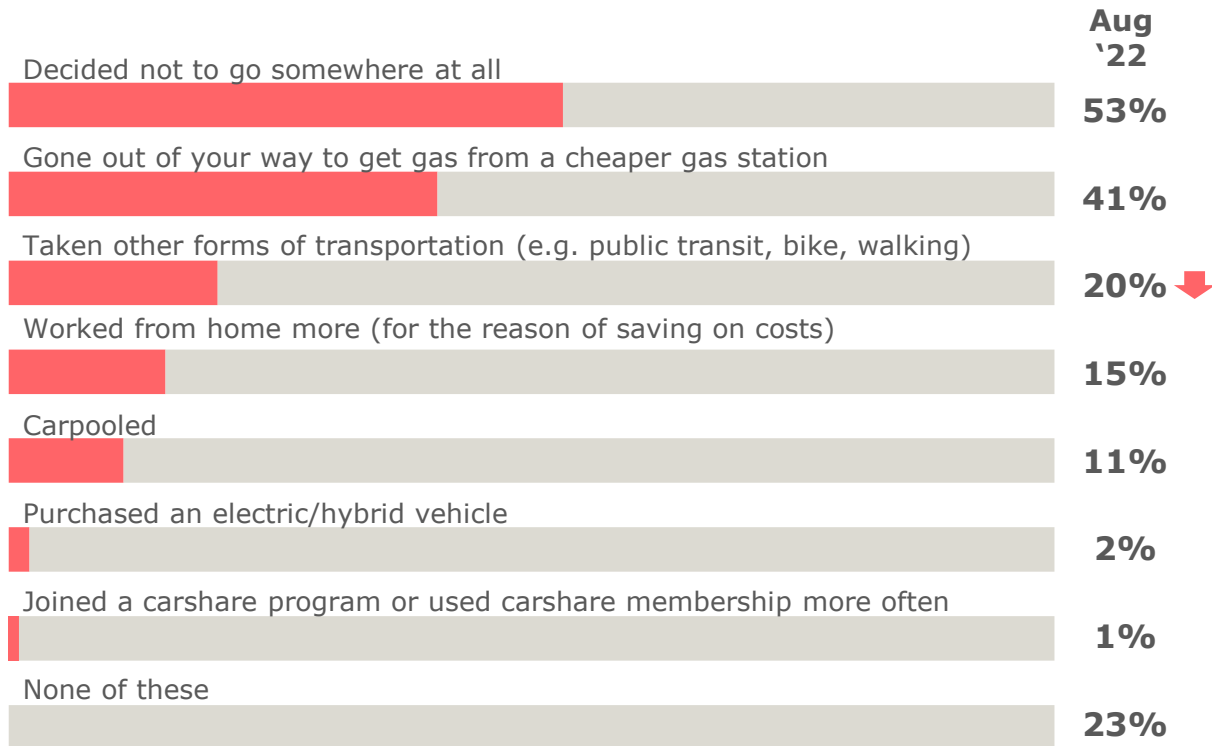


12% ↑
Have taken a flight for leisure/vacation

5%
Have taken a flight for business

Changes in Driving to Save on Gas

% Have Done in the Last Month



ANALYSIS

- A third (33%) of British Columbians report taking alternative forms of transportation (public transit, biking, walking, etc.) to save money on gas, by far the highest rate in the country.
- Young Canadians (18-34) are more than *twice as likely* as older Canadians (55+) to have taken alternative forms of transportation in the past month (27% vs. 11%, respectively) and *five times more likely* to have carpooled (21% vs. 4%).
- Residents of Alberta (51%) and Ontario (44%) are most likely to have gone out of their way to visit a cheaper gas station.



Base:
Exclude N/A (n=1,375)



Q: Over the last month, have you done any of the following to save on gas costs?

AUGUST 18-22, 2022

75%

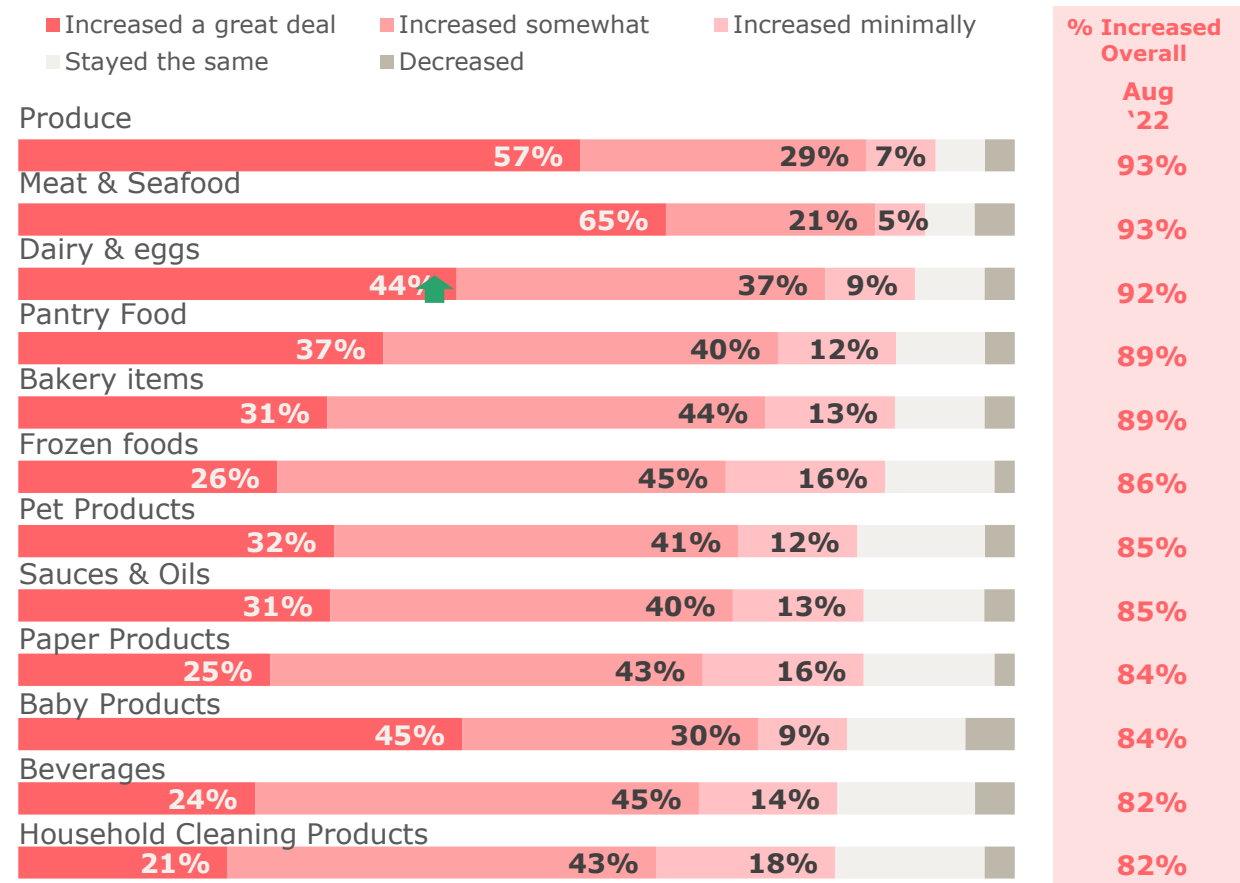
of Canadians have made at least one change in their driving habits over the past month to save on gas.

	Aug '22	July '22	June '22	May '22
Decided not to go somewhere at all	53%	57%	57%	56%
Gone out of your way to get gas from a cheaper gas station	41%	41%	39%	36%
Taken other forms of transportation (e.g. public transit, bike, walking)	20%	23%	23%	21%
Worked from home more (for the reason of saving on costs)	15%	17%	16%	17%
Carpooled	11%	12%	10%	11%
Purchased an electric/hybrid vehicle	2%	2%	2%	2%
Joined a carshare program or used carshare membership more often	1%	1%	1%	-
None of these	23%	21%	21%	23%

Grocery and Restaurants



Changes in Cost of Groceries



ANALYSIS

- Residents of Quebec are consistently most likely to have experienced substantial increases in the cost of their groceries since the start of the year.
- As the U.S. faces a nationwide shortage of baby formula, two-in-five (41%) Canadians who purchase baby products have noticed a significant price increase since January.

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Meat & seafood and produce have seen the largest price increases since January 2022, with most Canadians encountering significant inflation for these grocery items

	% Increased Overall			
	Aug '22	July '22	June '22	May '22
Produce	92%	93%	93%	92%
Meat & Seafood	91%	93%	93%	92%
Dairy & eggs	↑ 90%	92%	91%	89%
Pantry Food	88%	89%	90%	87%
Bakery items	88%	89%	↑ 89%	85%
Frozen foods	87%	86%	87%	84%
Pet Products	85%	85%	83%	82%
Sauces & Oils	85%	85%	↑ 84%	80%
Paper Products	↑ 85%	84%	82%	79%
Baby Products	83%	82%	87%	81%
Beverages	83%	84%	↑ 84%	80%
Household Cleaning Products	82%	↑ 82%	81%	76%

Changes in Habits to Save on Groceries

% Have Done in the Last Month



ANALYSIS

- Women are consistently more likely than men to have made changes in the past month to save money on groceries, such as buying fewer items than they normally would (55%, vs 47% of men), visiting multiple stores (53% vs. 47%) and redeeming loyalty rewards (46% vs. 37%).
- Lower income (<\$50k) households are largely purchasing fewer items than usual (58%) or changing to discount brands (57%) in order to reduce grocery expenses.

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92%

of Canadians have made at least one change in their grocery shopping habits over the last month in order to save money, rising to 95% of low-income (<\$50k) households

	Aug '22	July '22	June '22	May '22
Look for "special deals" before making a purchase	70%	70%	70%	70%
Buy fewer items than you ordinarily would	51%	54%	53%	53%
Change purchases to discount or no-name/store brands	52%	51%	47%	48%
Go to one grocery store or some items then another for other items	50%	49%	48%	48%
Redeem loyalty rewards programs	42%	42%	41%	40%
Purchase at places that offer loyalty rewards points	40%	40%	40%	38%
Switch to a value-based grocery store that offers lower prices	38%	36%	34%	35%
None of the above	8%	9%	9%	9%



Dining Habits

% Have Done in the Last Month



ANALYSIS

- For nearly all restaurant types and locations, young Canadians (18-34) and higher income households are significantly more likely to have dined out.
- In nearly all regions of the country, outdoor restaurant dining increased significantly continued to rise in the month of August. Patio dining remains lower in the Prairies and Atlantic Canada than other regions of the country.

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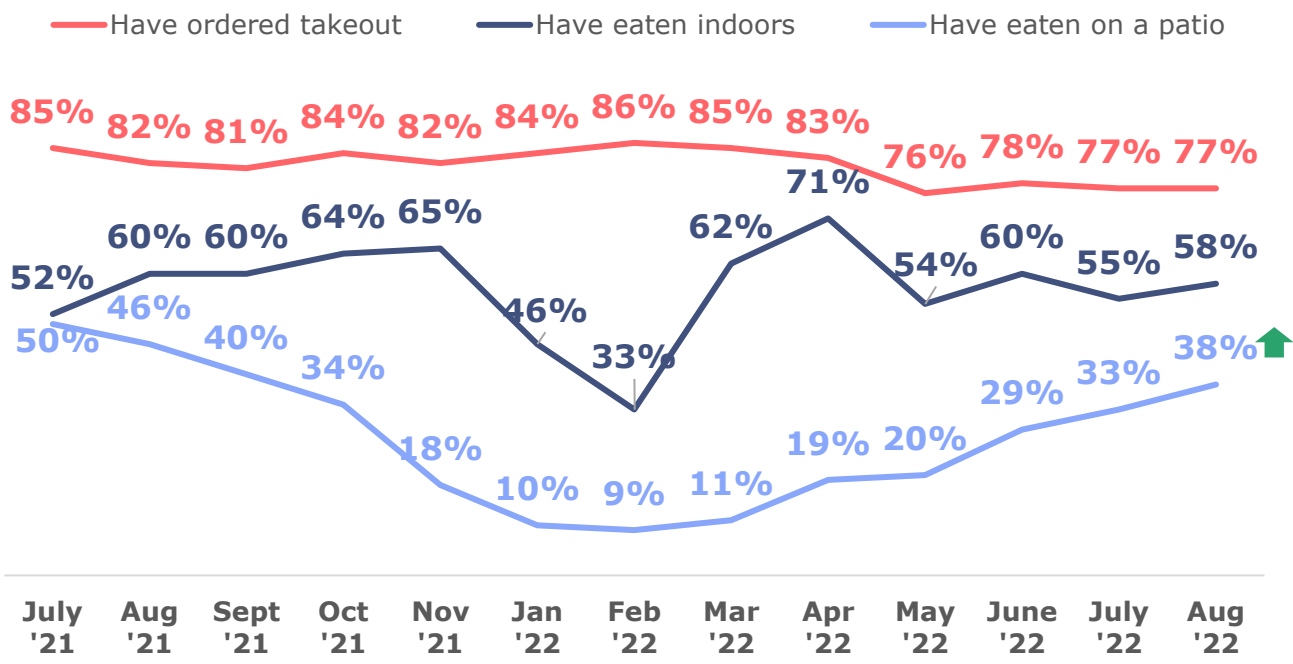
	Aug '22	July '22	June '22	May '22
Ordered take-out from a restaurant	54%	52%	54%	54%
Gone through a drive through	52%	51%	52%	49%
Eaten indoors at a traditional sit-down restaurant	45%	42%	47%	43%
Ordered from a café/coffee shop to-go	39%	37%	37%	35%
Eaten on a patio at a traditional sit-down restaurant	31% ↑	26%	22%	14%
Eaten indoors at a "fast food" restaurant (e.g., McDonald's, Subway, etc.)	18%	17%	17%	16%
Sat indoors at a café/coffee shop	16%	14%	16%	15%
Eaten in a food court at a mall	15%	14%	16%	14%
Sat on a patio at a café/coffee shop	12% ↑	10%	10%	7%
Eaten on a patio at a "fast food" restaurant (e.g., McDonald's, Subway, etc.)	7%	8%	7%	5%
None of these	11%	11%	11%	13%





Dining Habits

% Have Done in the Last Month



ANALYSIS

- After declining steadily over the past few months, indoor dining habits have increased in the month of August, and are almost on par with the same time last year (58%, vs. 60% in August 2021)
- Patio dining is most common in BC (43%), Ontario (40%) and Quebec (41%). Despite a notable decline overall in outdoor dining from this same time last year (38% vs. 46% in August 2021), outdoor dining appears to have rebounded somewhat over the past month (+5 percentage points).

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77%

Have ordered takeout
(either take-out or drive through)

58%

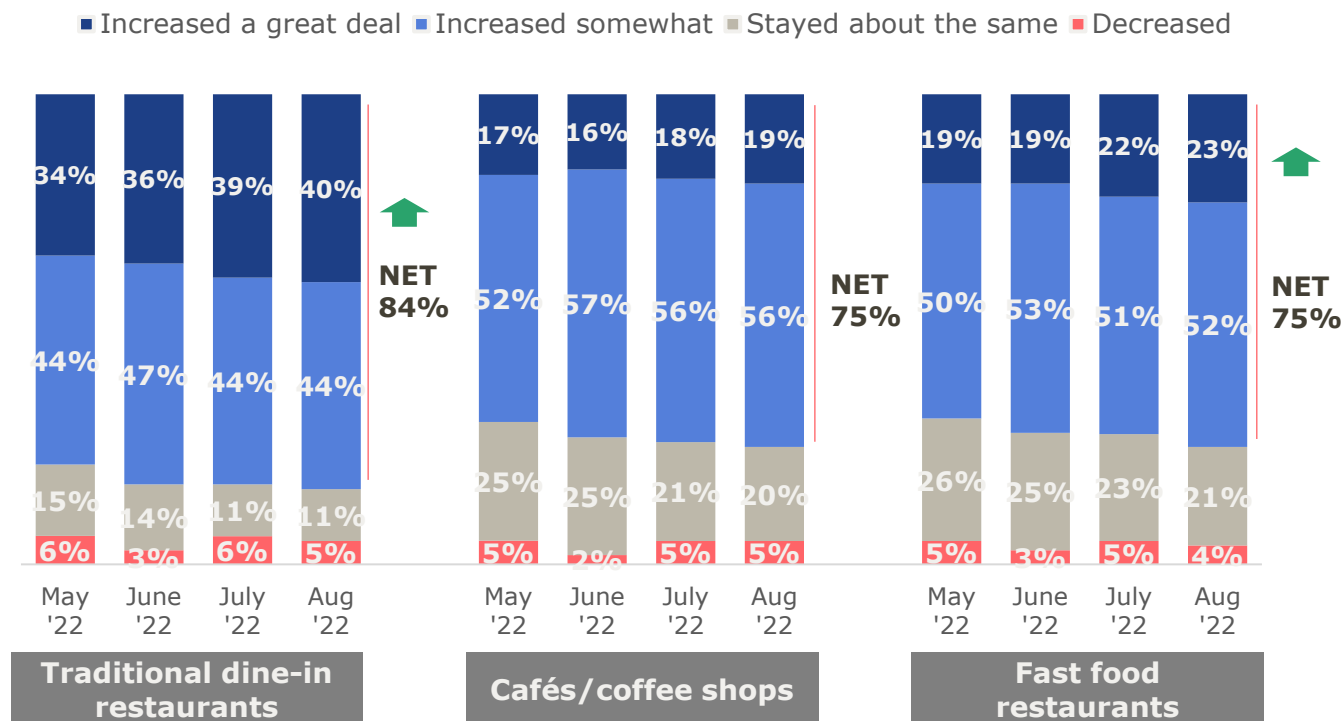
Eaten indoors at a restaurant,
fast food or food court
↑ 4 percentage points since May

38%

Eaten on a patio at restaurant
or fast food
↑ 18 percentage points since May

Changes in Pricing at Dining Venue

AUGUST 18-22, 2022

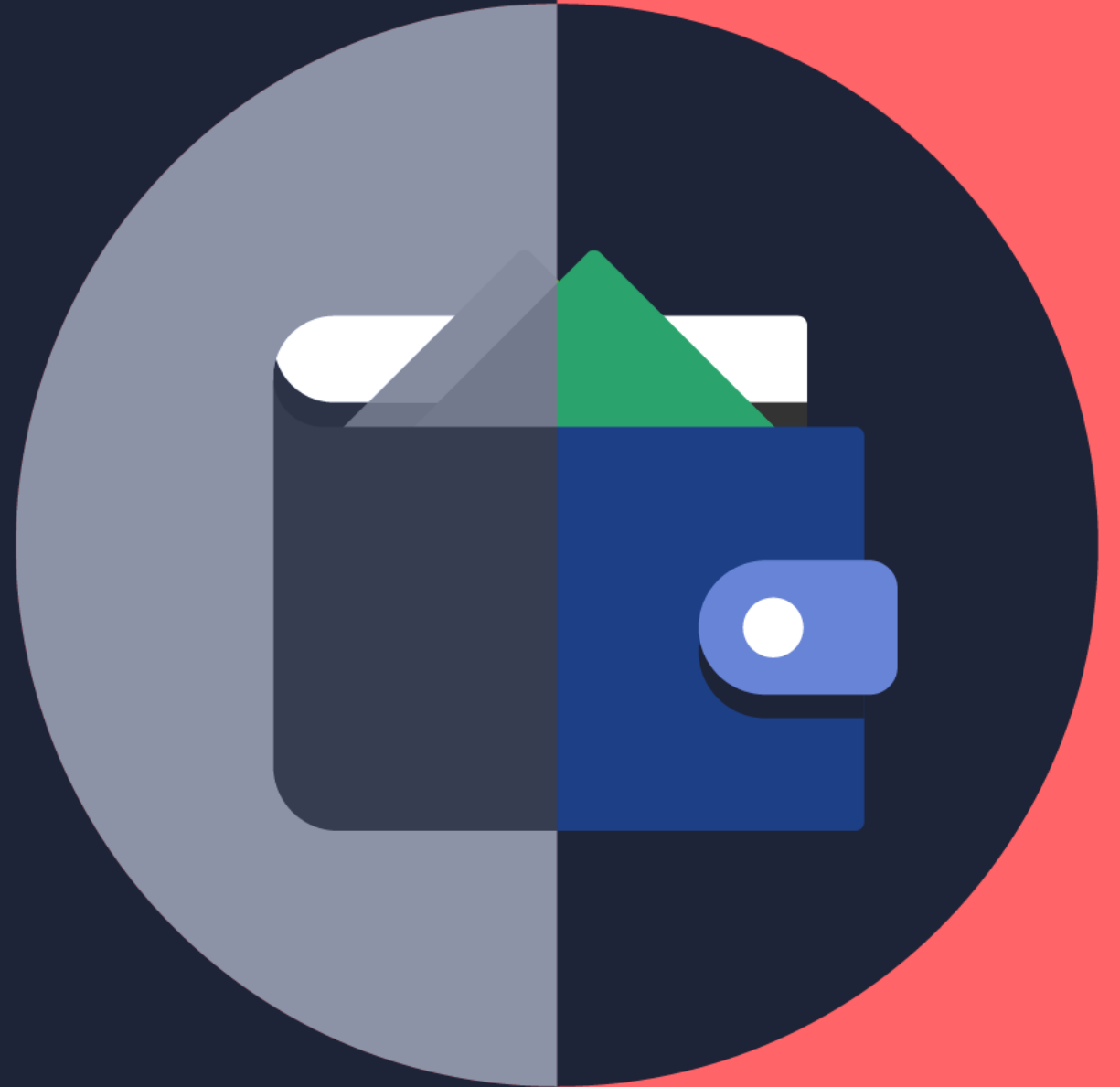


4-in-5 (84%) Canadians have noticed price increases at traditional dine-in restaurants since the start of the year, with older diners (55+) most likely to report a major jump (47%).

ANALYSIS

- Canadians 35+ and residents of Quebec are most likely to report significant increases in the cost of menu items at restaurants and cafés. At traditional dine-in restaurants specifically, roughly half (56%) of Quebec residents and 47% of Canadians 55+ say prices have increased a great deal since January.

Back to School & Holidays



Back to School Spending

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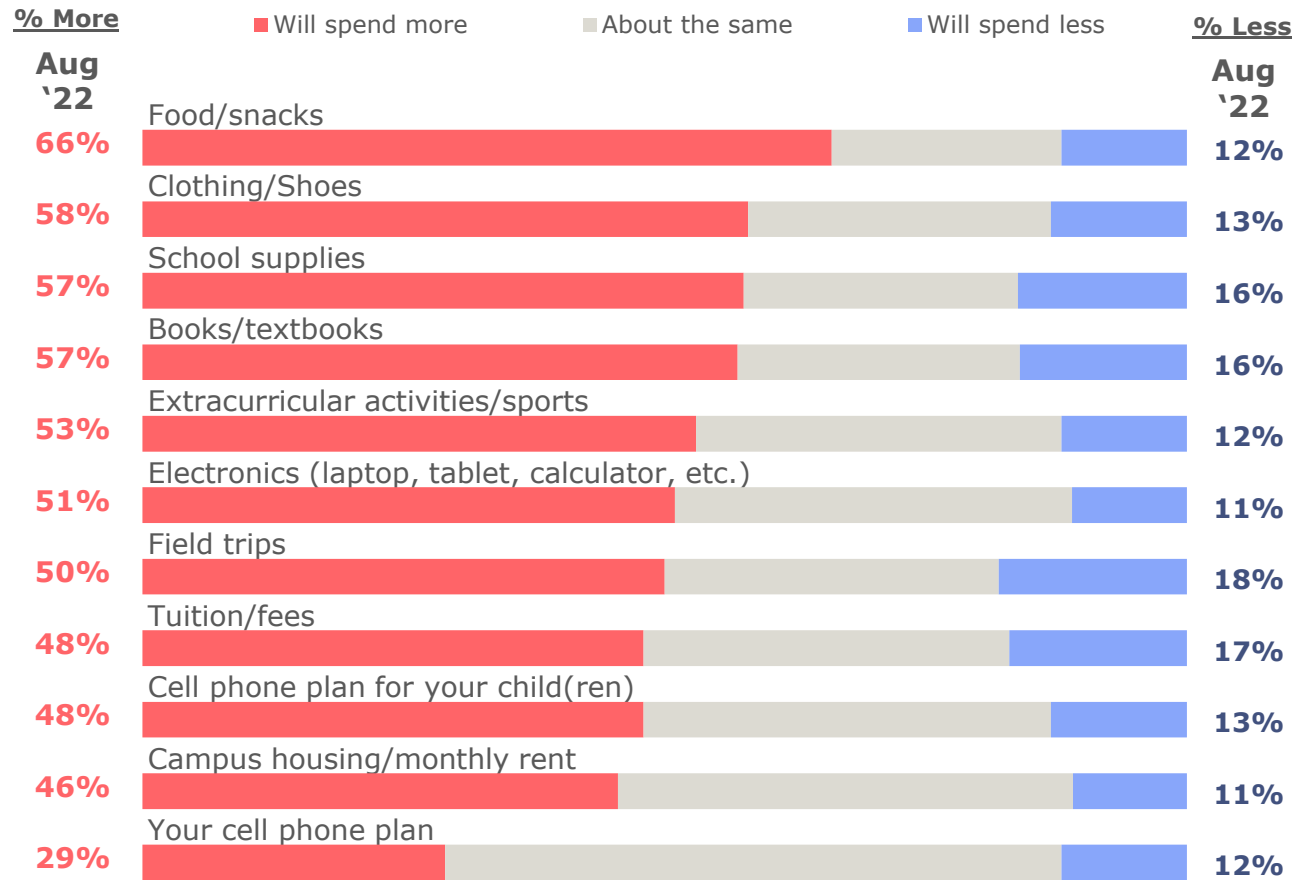
ANALYSIS

- Lower income households (<\$100k) are *three times more likely* to indicate that they will be spending a lot less on back to school expenses than higher income households (14% vs. 4%).



Spending on Back-to-School vs. Last Year

AUGUST 18-22, 2022

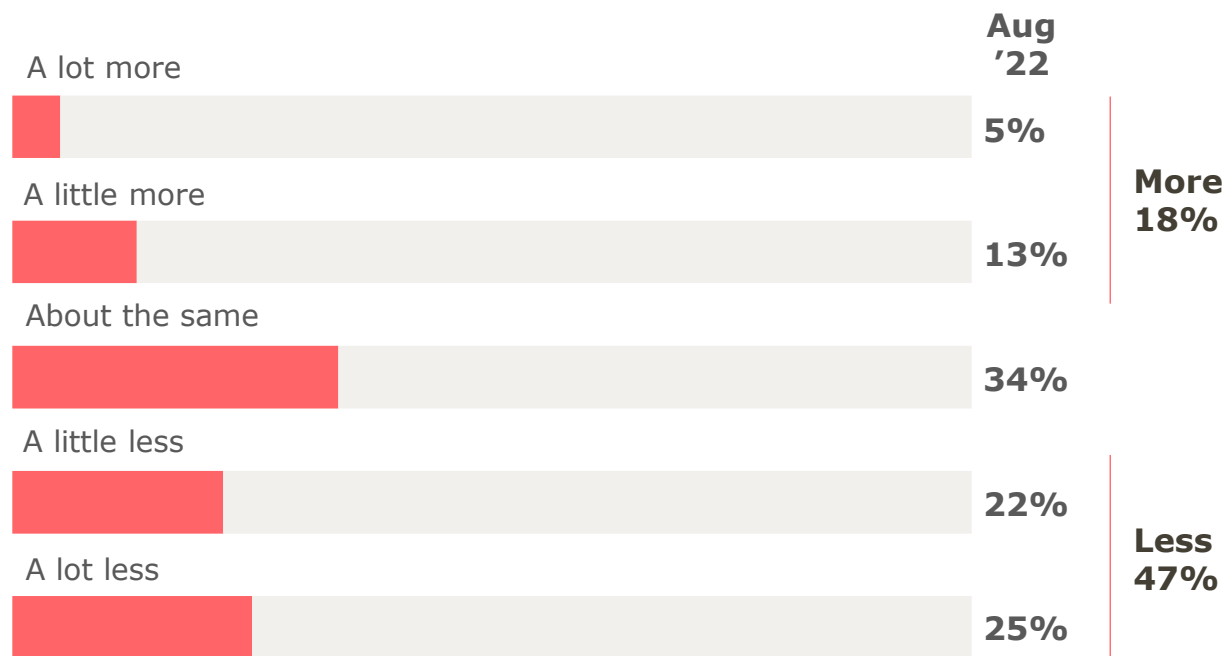


ANALYSIS

- Men are more likely to anticipate higher spending on most categories, notably clothing/shoes (62%), school supplies (63%) and field trips (53%)
- 35-54 year olds expect increased spending on food/snacks (73%) and clothing/shoes (65%)



Holiday Spending



ANALYSIS

- Increased holiday spending is expected to be higher among 18-34 year olds (27%), Albertans (21%) and higher income households (23%).
- Decreased holiday spending is expected to be higher among women and those ages 55+ (both 50%).

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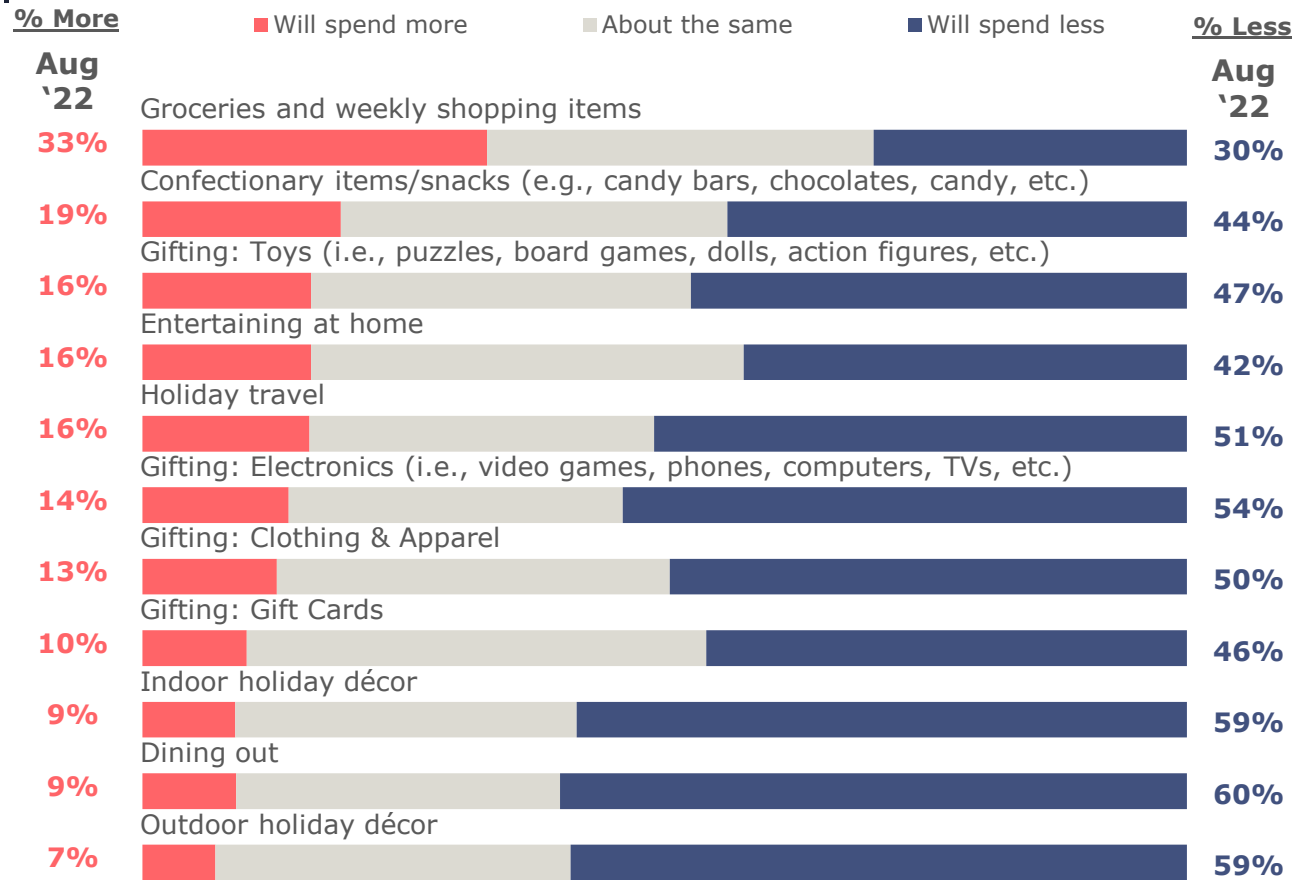
18%

of respondents indicate they will be *spending more* this holiday season compared to last year.

47%

of respondents indicate they will be *spending less* this holiday season compared to last year

Spending on Holiday Items vs. Last Year



ANALYSIS

- Holiday spending is expected to be higher for groceries and weekly shopping items, as well as entertaining categories compared with gifts and décor.

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