

CANADIANS & CROSS BORDER SHOPPING

The Impact of the Stronger \$Can & Online Shopping

GRAPHS TO ACCOMPANY PRESS RELEASE

Prepared by: ZINC Research and Dufferin Research

Date: November 29, 2007



Introduction & Methodology

- ZINC Research and its partner, online research specialists, Dufferin Research recently conducted an online poll to assess any shifts in shopping behaviour of online Canadians.
- Areas investigated include:
 - ❖ Shopping specifically for the holiday season online this year.
 - ❖ Likelihood of shopping at U.S. online stores.
 - ❖ Motivations to shop at U.S. online stores.
- Data collection was conducted via online panel of 1,200 respondents..
 - ❖ Census representative – Data weighted by region, age and gender.
- Field dates: November 19 to 23, 2007.
- The survey was fielded exclusively in English.
- Caution should be used when examining sub-samples, as the margin of error increases with smaller base sizes.

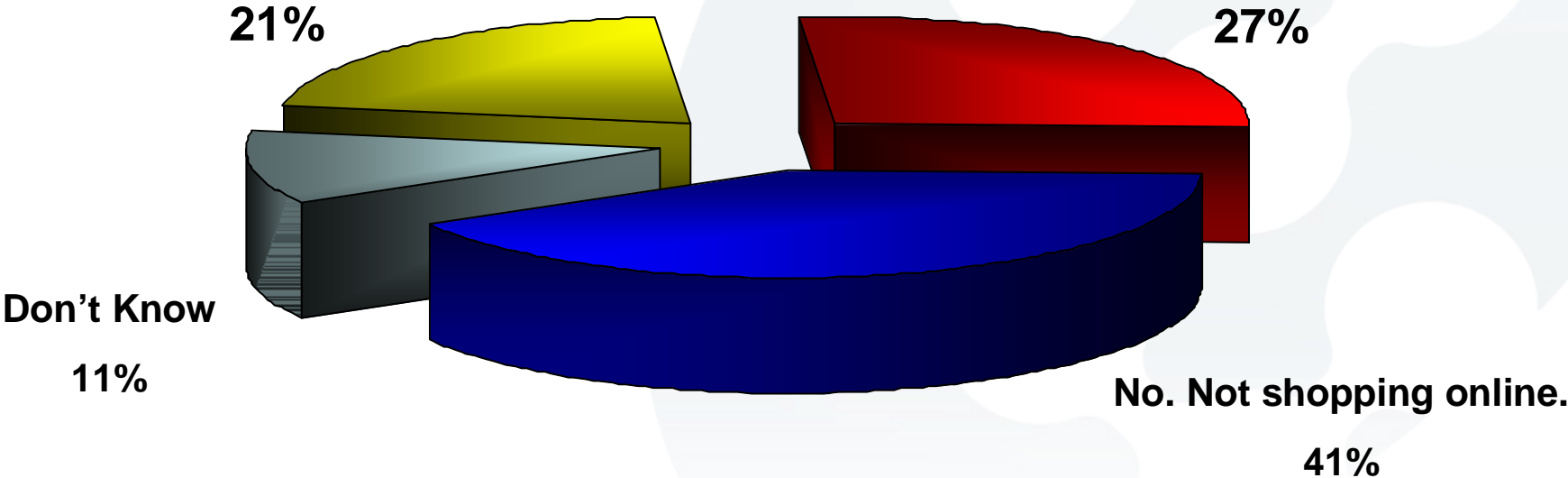


Shopping Specifically for the Holiday Season Online

“Q1. Are you doing any of shopping specifically for the holiday season online this year?”

YES. And have done so already.

NOT YET. But planning to do so shortly.



48% of online Canadians are either currently or planning to shop online for the holiday season this year.

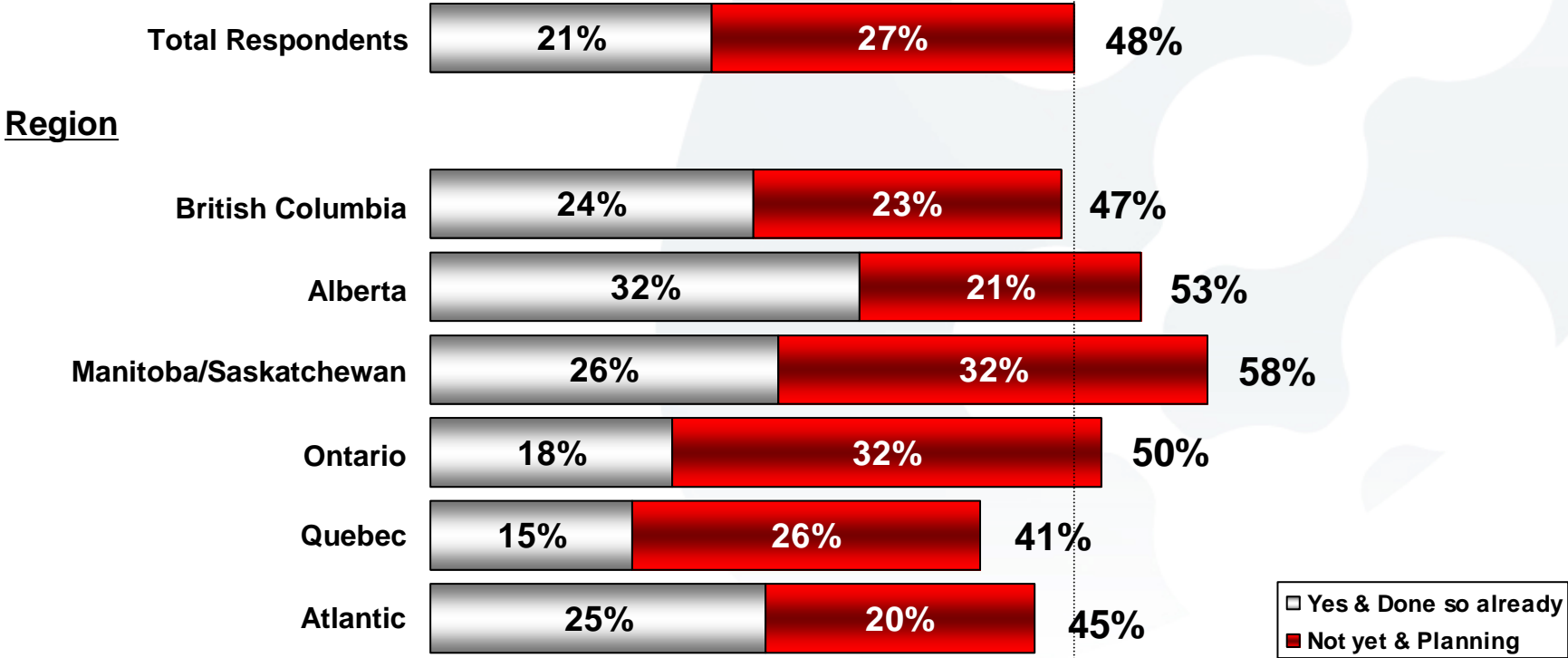
Base: All Respondents (n=1200)



Shopping Specifically for the Holiday Season Online – By Province

“Q1. Are you doing any of shopping specifically for the holiday season online this year?”

% indicating that they have shopped online or planning to do so for the holiday season.



Base: All Respondents (n=1200), census representative sample by region.

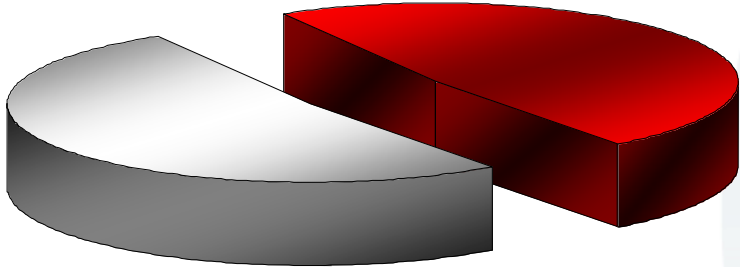


Shopping Online & Predisposition Compared to Last Year

“Q1. Are you doing any of shopping specifically for the holiday season online this year?”

“Q2. Would you say that you are shopping online for the holiday season...?”

Yes & Planning to Shop Online
48%



No & Don't Know
52%

Base: All respondents (n=1,200)



Comparison to last year of online shopping activity

MORE THAN LAST YEAR



39%

ABOUT THE SAME AS LAST YEAR



50%

LESS THAN LAST YEAR



11%

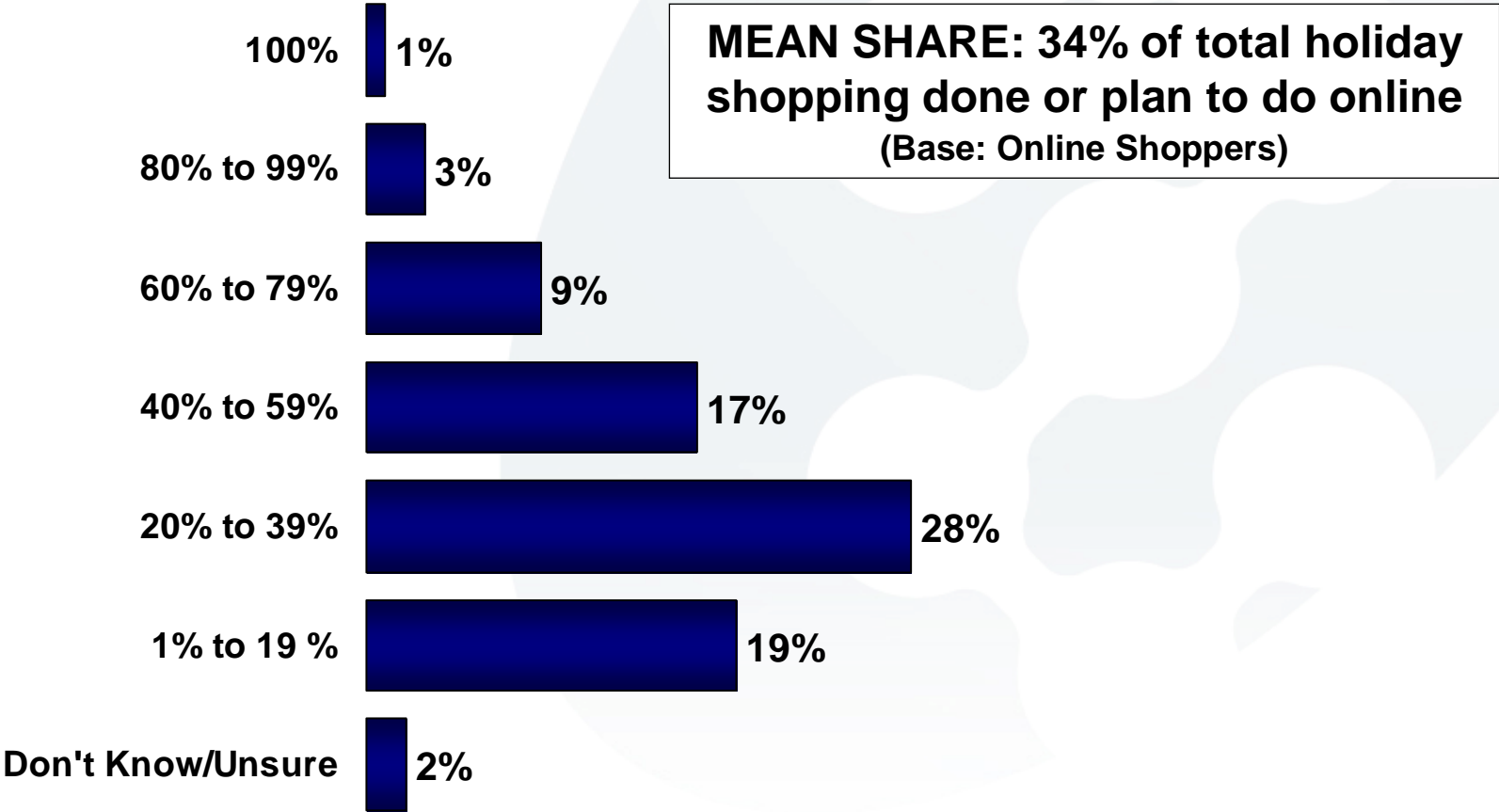
Base: Respondents who have done online shopping and are planning to do so shortly (n=575)

NET DIFFERENCE: +28 points
(More than last year minus Less than last year)



Share of Total Holiday Shopping Done Online

“Q3. What share of your total holiday shopping will be done or do you plan to do online?”



% of Respondents indicating share of holiday shopping to be done online

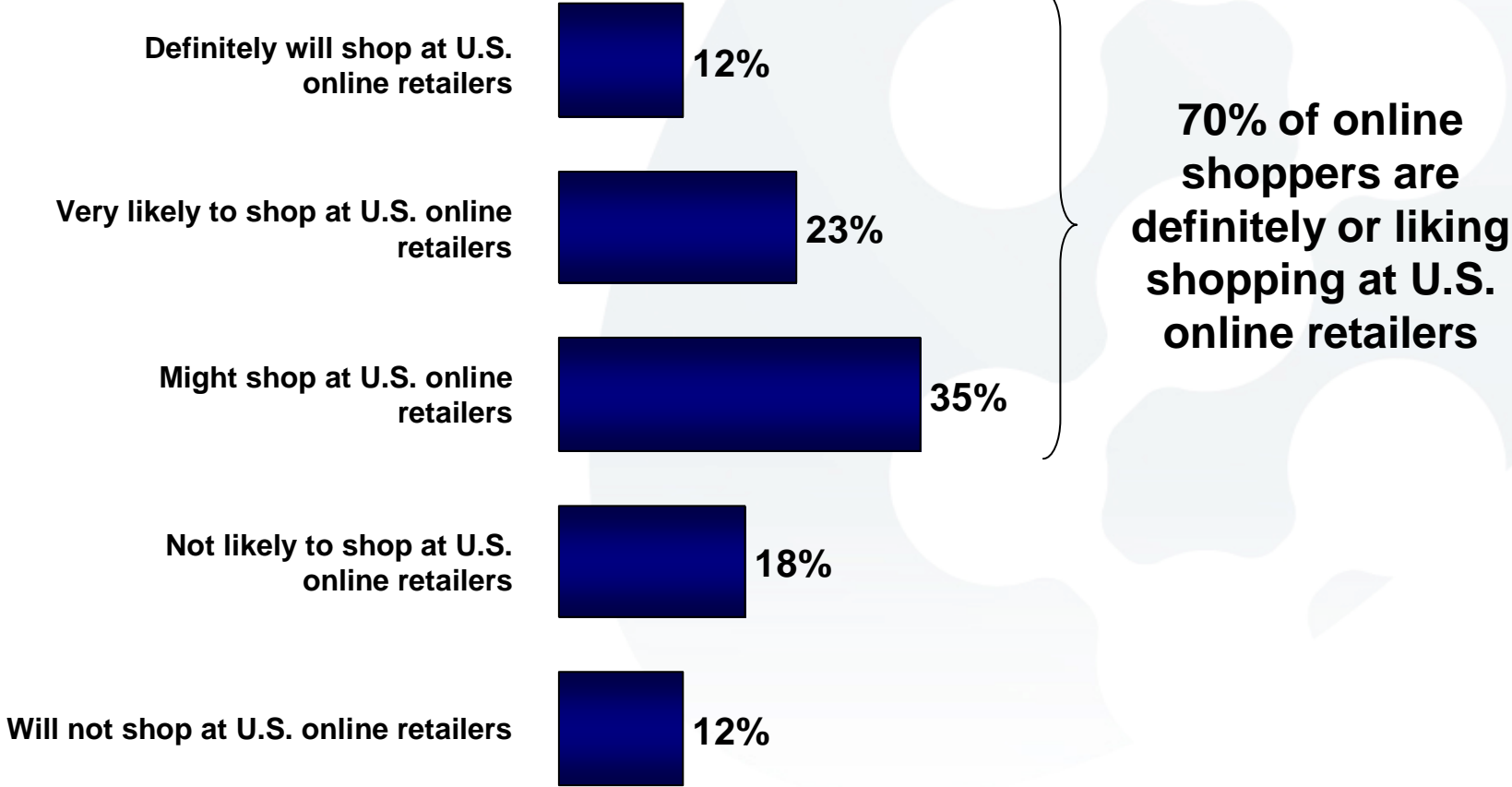
Base: Respondents who have done online shopping and are planning to do so shortly (n=575)





Online Shoppers – Likelihood of Shopping at U.S. Online Stores

“Q4. How likely will you be doing your online holiday online shopping at U.S. online stores?”



% of Respondents indicating statement applies to them

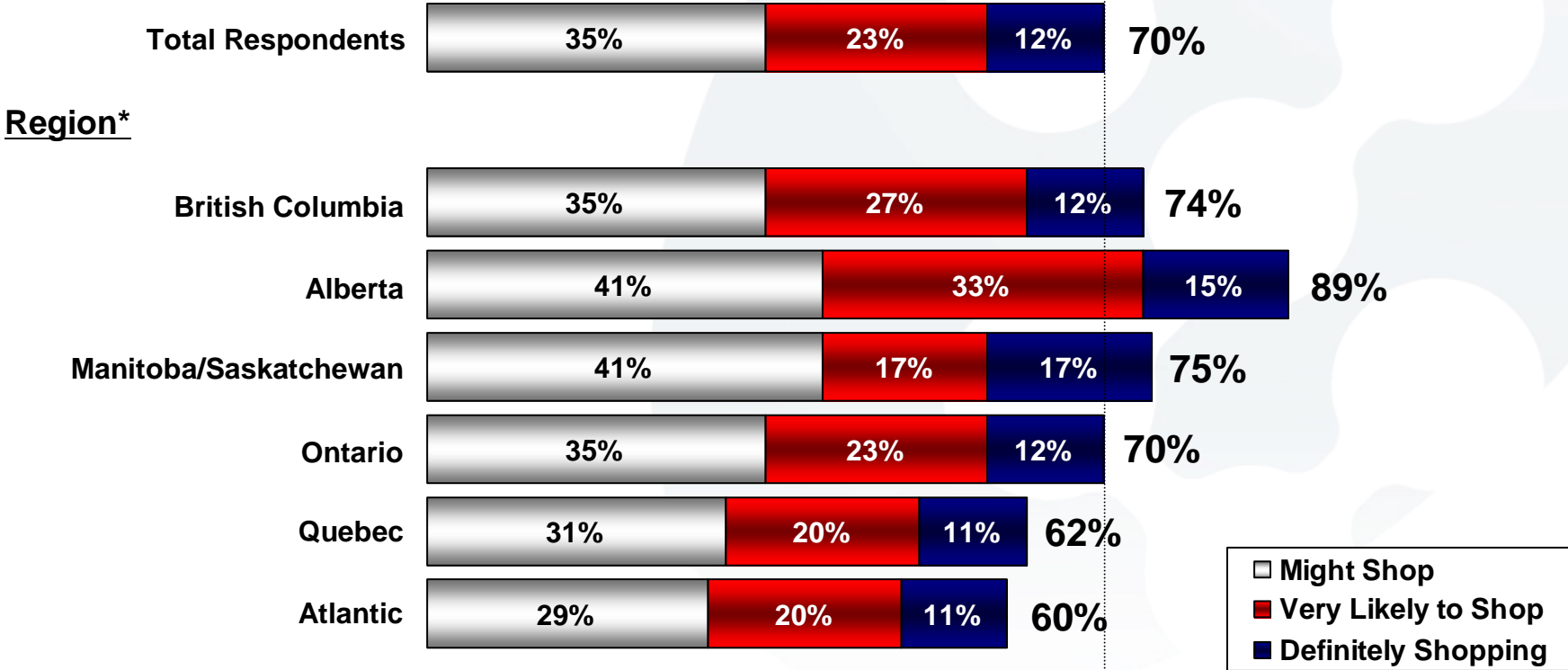
Base: Respondents who have done online shopping and are planning to do so shortly (n=575)



Online Shoppers – Likelihood of Shopping at U.S. Online Stores – By Province

“Q4. How likely will you be doing your online holiday online shopping at U.S. online stores?”

% indicating that they have or considering shopping at U.S. online retailers for the holiday season.



Base: Respondents who have done online shopping and are planning to do so shortly (n=575)

*Caution: Small base sizes.



Shopping Online & Intentions to Shop at U.S. Online Retailers

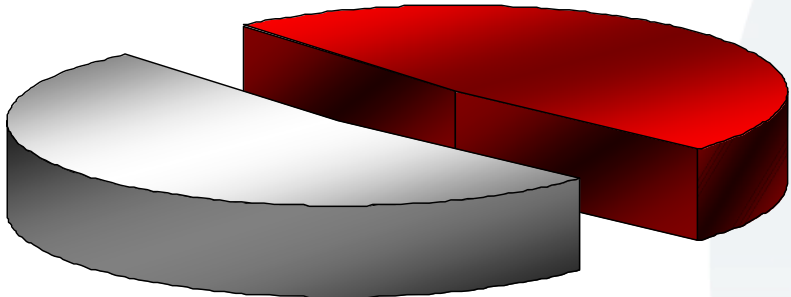
“Q1. Are you doing any of shopping specifically for the holiday season online this year?”

“Q4. How likely will you be doing your online holiday online shopping at U.S. online stores?”

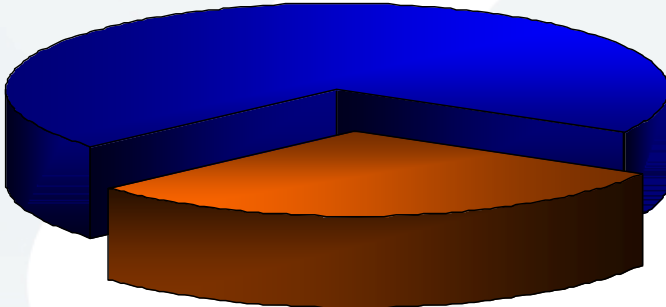
Yes & Planning to Shop Online
48%



Definitely/Very Likely/Might Shop at U.S. Online Retailers
70%



No & Don't Know
52%



Unlikely/Will Not Shop at U.S. Online Retailers
30%

Base: All respondents (n=1,200)

Base: Respondents who have done online shopping and are planning to do so shortly (n=575)

34% (48% x 70%) of online Canadians are either definitely, very likely or considering shopping at U.S. online retailers for the holiday season this year.



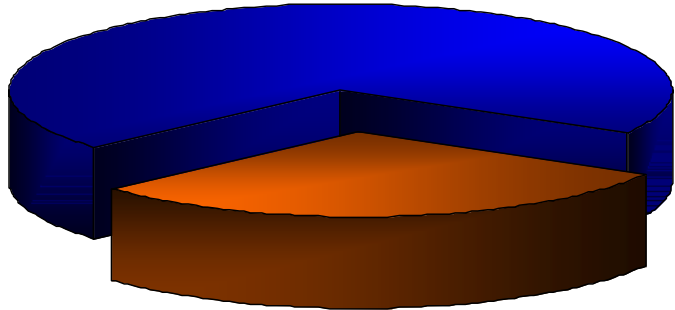
Shopping at U.S. Online Retailers & Predisposition Compared to Last Year

“Q4. How likely will you be doing your online holiday online shopping at U.S. online stores?”

“Q5. Would you say that you are shopping at US online stores for the holiday season...?”

Definitely/Very Likely/Might Shop at U.S. Online Retailers

70%



Unlikely/Will Not Shop at U.S. Online Retailers

30%

Base: Respondents who have done online shopping and are planning to do so shortly (n=575)



Comparison to last year of U.S. online shopping activity

MORE THAN LAST YEAR



45%

ABOUT THE SAME AS LAST YEAR



46%

LESS THAN LAST YEAR



9%

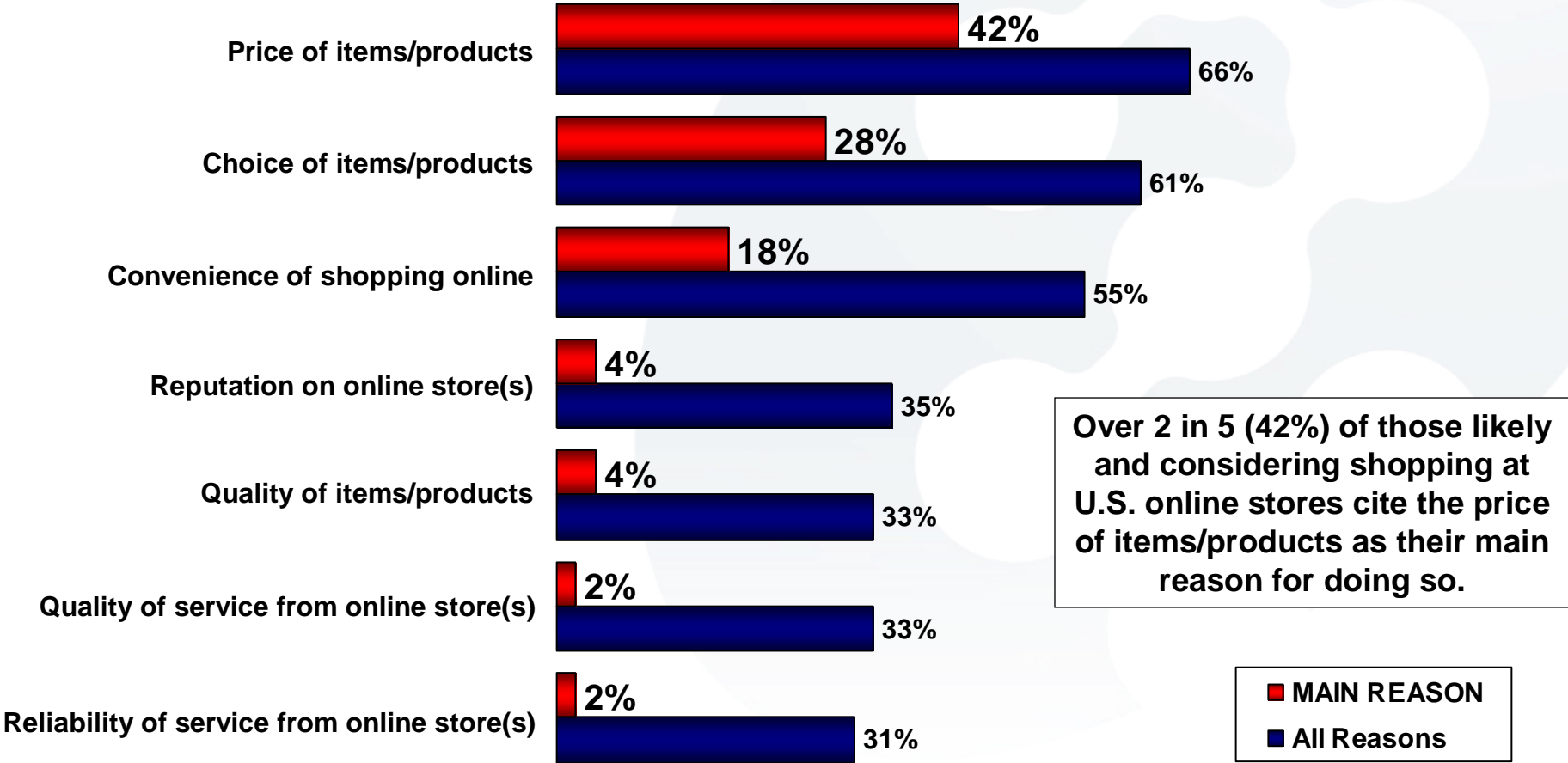
Base: Respondents who are likely & considering shopping at U.S. online retailers (n=407)

NET DIFFERENCE: +36 points
(More than last year minus Less than last year)



Online Shoppers – Reasons for Shopping at U.S. Online Stores

“Q6. What would you say are your reasons for shopping at US online stores for the holiday season...?”



% of Respondents mentioning reasons for shopping at U.S. online Stores

Base: Respondents who are likely & considering shopping at U.S. online retailers (n=407)



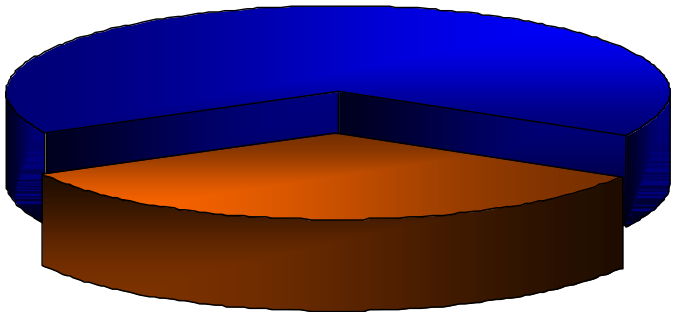
Price as a Reason for Shopping at U.S. Online Retailers & Rationale Compared to Last Year

“Q6. What would you say are your reasons for shopping at US online stores for the holiday season...?”

“Q7. You indicated that price was one of your reasons for shopping at US online stores for the holiday season. Would you say that reason is...?”

Mentioned Price of Items/Products for shopping at U.S. Online Retailers

66%



Other Reasons other than Price of Items/Products

34%

Base: Respondents who are likely & considering shopping at U.S. online retailers (n=407)



Applicability of price to U.S. online shopping activity

MORE APPLICABLE THIS YEAR THAN LAST YEAR

75%

ABOUT THE SAME THIS YEAR AS LAST YEAR

22%

LESS SO THIS YEAR THAN LAST YEAR

3%

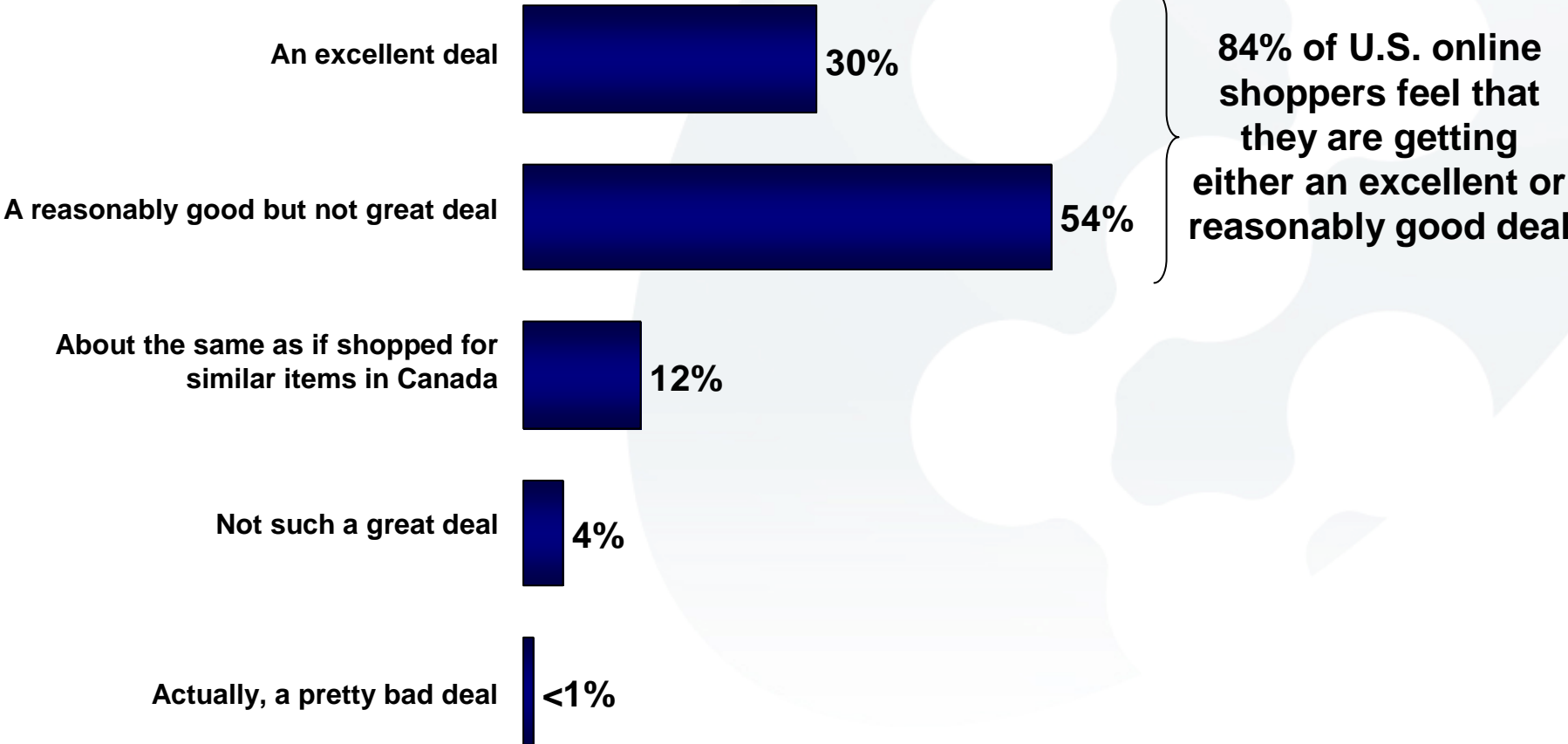
Base: Respondents who are likely & considering shopping at U.S. online retailers citing price of items/products as reason for doing so (n=271)

NET DIFFERENCE: +72 points
(More than applicable this year than last year minus Less so this year than last year)



Shopping at U.S. Online Retailers & Perception of Value

“Q8. With all costs considered (including shipping and duty), how good a deal do you feel you are getting or will get shopping at US online stores?”



% of Respondents indicating perception of shopping at U.S. online stores

Base: Respondents who are likely & considering shopping at U.S. online retailers (n=407)



Partner & Online Research Specialists