Numerator

Tracking Canadian Cold & Flu Trends During COVID-19

Throughout the 2021-2022 Cold & Flu season, we tracked Canadian consumer behaviour across key winter categories.

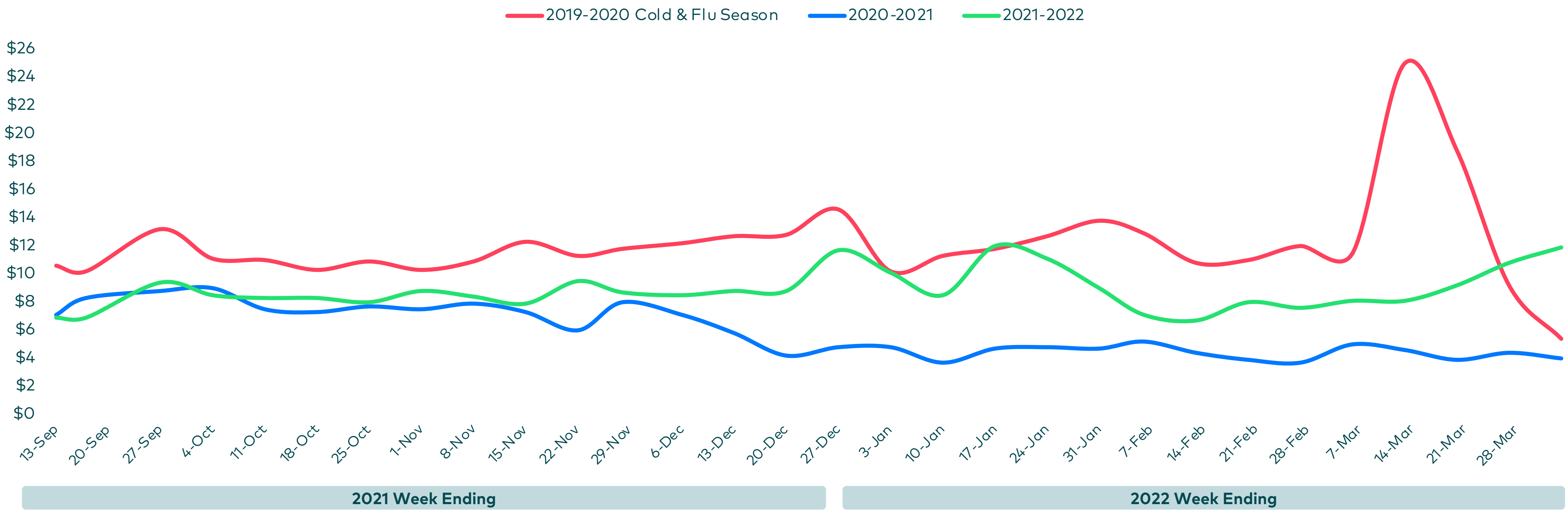
Numerator's Canadian Cold Weather Tracker leveraged omnichannel sales data from Numerator's Canadian OmniPanel to provide weekly insight into consumer buying behaviour in the Cold, Cough & Flu category and sales trends across adjacent categories. We compared 2021-2022 trends to the 2020-2021 Cold & Flu season (with COVID-19) and the 2019-2020 Cold & Flu season (pre-COVID).

Numerator

Post re-opening, Cold, Cough & Flu sales have remained elevated vs. YAG.

Cold, Cough & Flu category sales trends correspond with COVID-19 waves across Canada. Most notably, spikes in COVID cases in January and early April 2022 are reflected below.

WEEKLY COLD, COUGH & FLU SALES



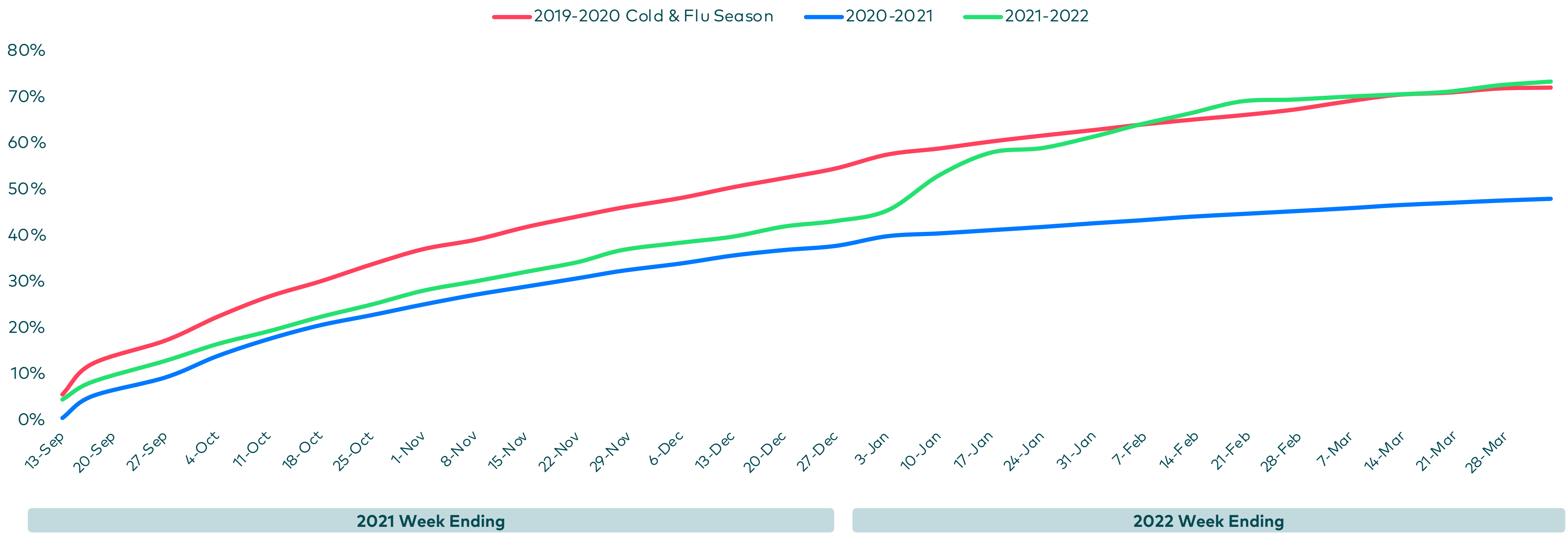
Numerator Canada Insights, Cold Cough & Flu Sales, 09/13/2019 - 04/03/2022

Numerator

After Omicron, cumulative Cold, Cough & Flu HH penetration surpassed 2019.

Weekly 2021-2022 cumulative household penetration tracked more closely to 2020-2021 levels until the Omicron wave, which accelerated HH penetration past the 2019-2020 Cold & Flu season (pre-COVID).

CUMULATIVE COLD, COUGH & FLU HH PENETRATION



Numerator Canada Insights, Cold Cough & Flu Sales, 09/13/2019 - 04/03/2022

Numerator

At the end of 2021-2022 Cold & Flu season, key metrics remain elevated.

While 2021-2022 Cold, Cough & Flu HH penetration and sales have trended below pre-COVID levels, since the Omicron wave, buy rate has approached or surpassed pre-COVID levels on multiple instances.

COLD, COUGH & FLU METRICS

HH Penetration	Buy Rate	Projected Sales Index
61.4%	**$33.29**	**162**
+13.2 pp vs. YAG	+$6.81 vs. YAG	+62 pp vs. YAG
-10.6 pp vs. 2YAG	-$0.19 vs. 2YAG	-13 pp vs 2YAG

Numerator Canada Insights, Cold Cough & Flu Omnichannel Category Metrics, 09/13/2019 - 04/03/2022

Numerator

The impact on winter categories has been mixed.

Adjacent categories that did not see growth during peak COVID (2020) vs. 2YAG have grown throughout the 2021-2022 Cold & Flu season, including Pain Relievers, Tea, and Facial Tissue.

WINTER CATEGORY SALES INDEX

	Cold, Cough & Flu	Pain Relievers	Stocks & Broths	Hand & Body Lotions	Tea	Facial Tissue
YAG vs. 2YAG	54	88	113	104	95	89
09/13/21 - 04/03/22 vs. YAG	162	118	95	100	107	110

Numerator Canada Insights select Winter categories from above: 09/13/2019 - 04/03/2022

What's Next

Expect Cold, Cough & Flu and adjacent categories to **gradually return** to pre-COVID levels.

Quantify behavioural shifts

Understand which consumers stayed loyal through periods of disruption and which switched to competitive brands.

Revamp your retailer strategies

Identify which consumer segments leaked to competitive retailers during COVID waves and how to win them back.

Plan for future disruption

Survey your verified buyers to understand their sentiment and purchase intentions over the next six months.

Numerator

Looking for more **omnichannel** Canadian insights?

Reach out to hello@numerator.com or visit Numerator.ca for the latest research.