

# U.S. Grocery Shopper Trends: The Impact of COVID-19



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# U.S. Grocery Shoppers Trends: The Impact of COVID-19

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# FMI Antitrust Compliance

- It is FMI's policy to comply in all respects with the antitrust laws.
- All participants in FMI meetings and events are expected to comply with applicable antitrust and competition laws.
- Avoid discussions of sensitive topics that can create antitrust concerns.
  - Agreements to fix prices, allocate markets, engage in product boycotts and to refuse to deal with third parties are illegal.
  - Discussions of prices (including elements of prices such as allowances and credit terms), quality ratings of suppliers, and discussions that may cause a competitor to cease purchasing from a particular supplier, or selling to a particular customer, should be avoided.
  - No discussion that might be interpreted as a dividing up of territories.
- It is important to avoid even the appearance of unlawful activity.
- Questions or concerns? Please consult with FMI staff.

# Research background

For more than four decades, FMI has been tracking the trends of grocery shoppers in the U.S., taking note of where they shop, how they shop and what issues are most important to them as food shoppers. Shortly after completing our 2020 data collection, the COVID-19 pandemic struck the U.S. FMI has and continues to track the impact of the pandemic by conducting ongoing research among grocery shoppers.

## Methodology

### Quantitative Research

- Initial U.S. Grocery Shoppers Trends online survey among n=2,000+ fielded February 7-27, 2020
- Initial U.S. Grocery Shoppers Trends COVID-19 tracker survey among n=1,000+ fielded March 21-26, 2020
- Subsequent waves of the U.S. Grocery Shoppers Trends COVID-19 tracker survey among n=1,000+ fielded:
  - March 28 - April 2, 2020
  - April 4 – 9, 2020
  - April 15 – 25, 2020

# What we plan to cover

**COVID-19 Overview: Concerns and Disruptions**

**Changes in the Where, How and Who of Grocery Shopping**

**The Evolving Role of Online Grocery Shopping**

**Focus areas:**

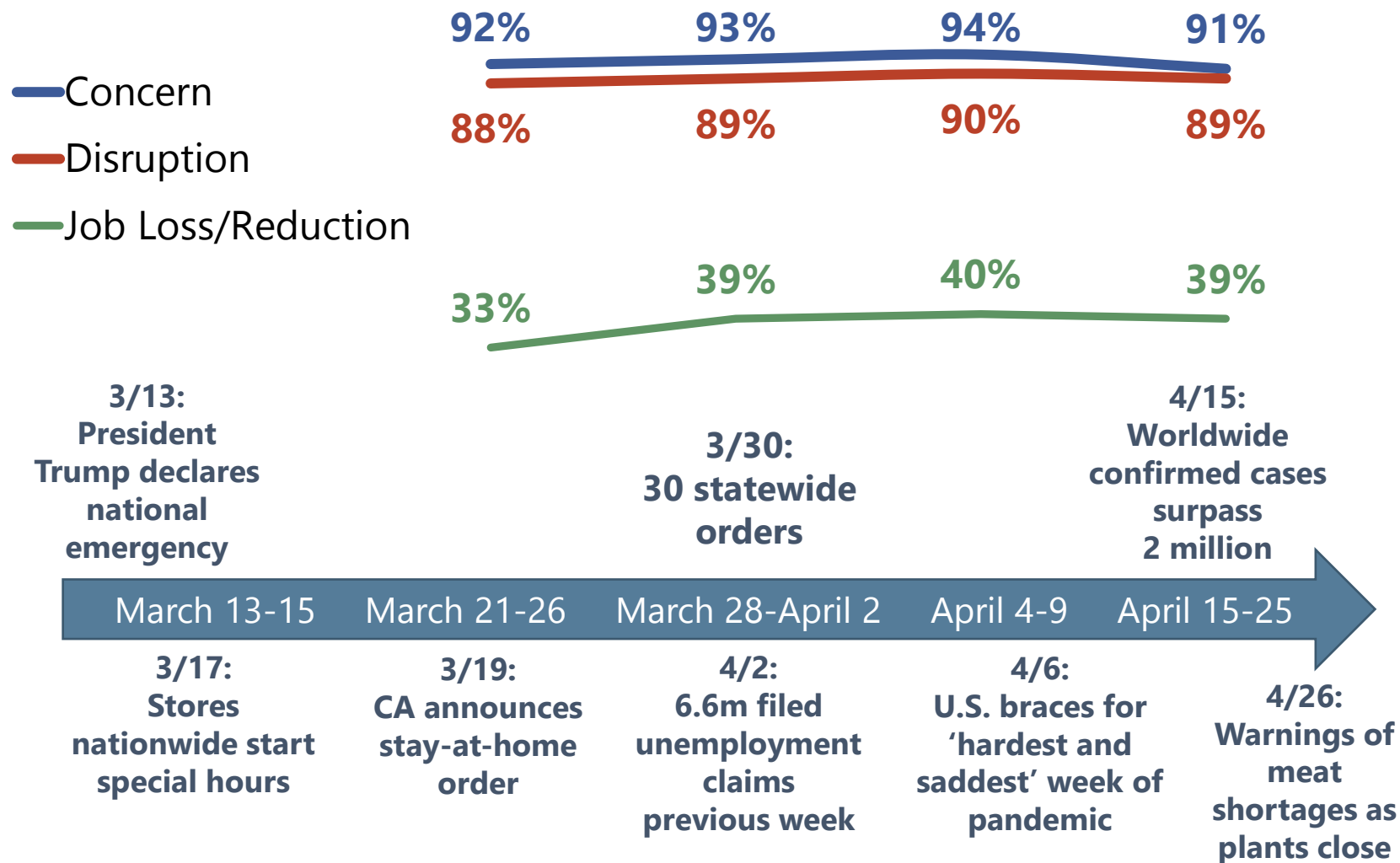
**1)Feeding families 2)Demographic 3)Cooking/eating at home**

**Grocery Stores Rising to Meet Shopper Needs**

# COVID-19 Overview: Concerns and Disruptions



# COVID-19 Overview: Concerns and Disruptions



# Changes in the Where, How and Who of Grocery Shopping





# Changes in the WHERE, How and Who of Grocery Shopping

**78%**

Of shoppers have made a change in WHERE they shop as a result of the COVID-19 pandemic

**40%** Shop at fewer stores ↑

**28%** Shop more online ↑

**15%** Avoid stores I usually shop at

**11%** Changed store shop at most frequently

**10%** Shop at different type of stores

**10%** No longer shop in-store

# Changes in the Where, HOW and Who of Grocery Shopping

89%

Of shoppers have made a change in HOW they shop as a result of the COVID-19 pandemic

44% ↑

- Spend more money each visit

32%

- Shopping trips are faster

25%

- Range of items bought is narrower

16%

- Spend more money online

# Changes in the Where, How and WHO of Grocery Shopping

Only one person shops when previously two or more shopped

24%↑

Someone outside household (relative/friend) shops

11%

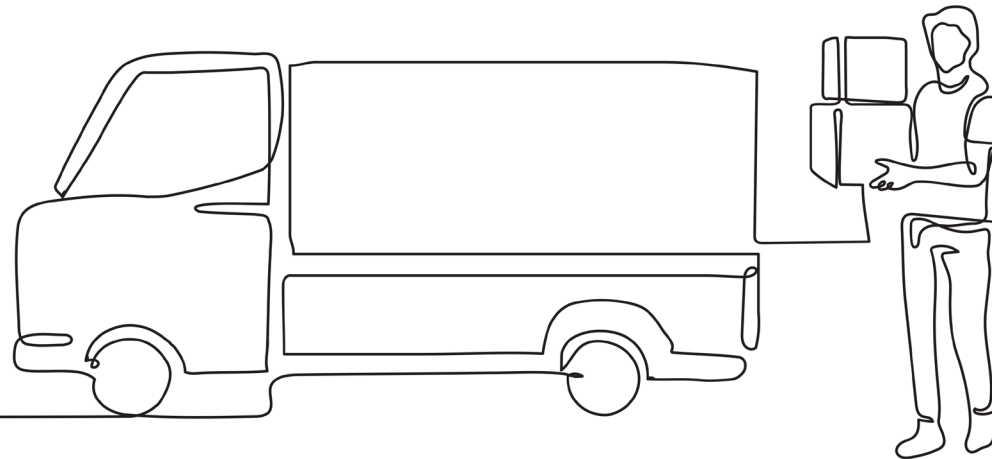
Different person in household now shops

3%

36%

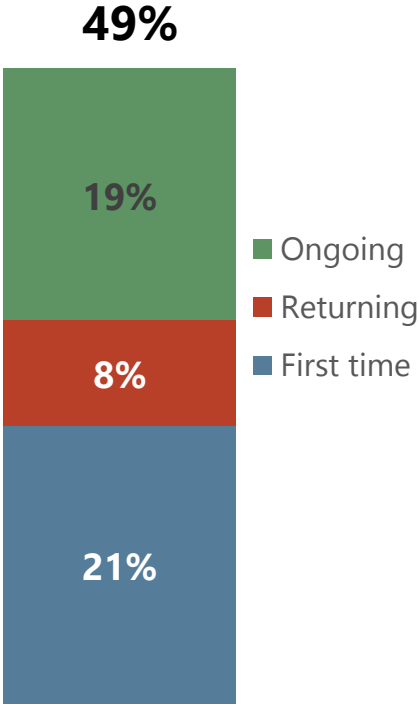
of shoppers have made a change in WHO shops as a result of the COVID-19 pandemic

# The Evolving Role of Online Grocery Shopping

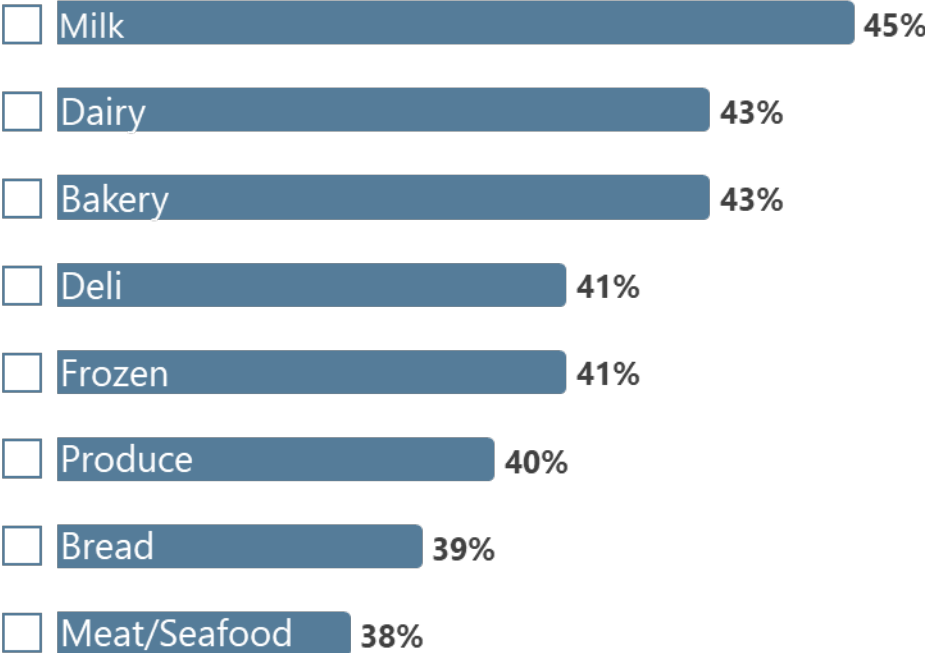


# The Evolving Role of Online Grocery Shopping

Online shopping in past month

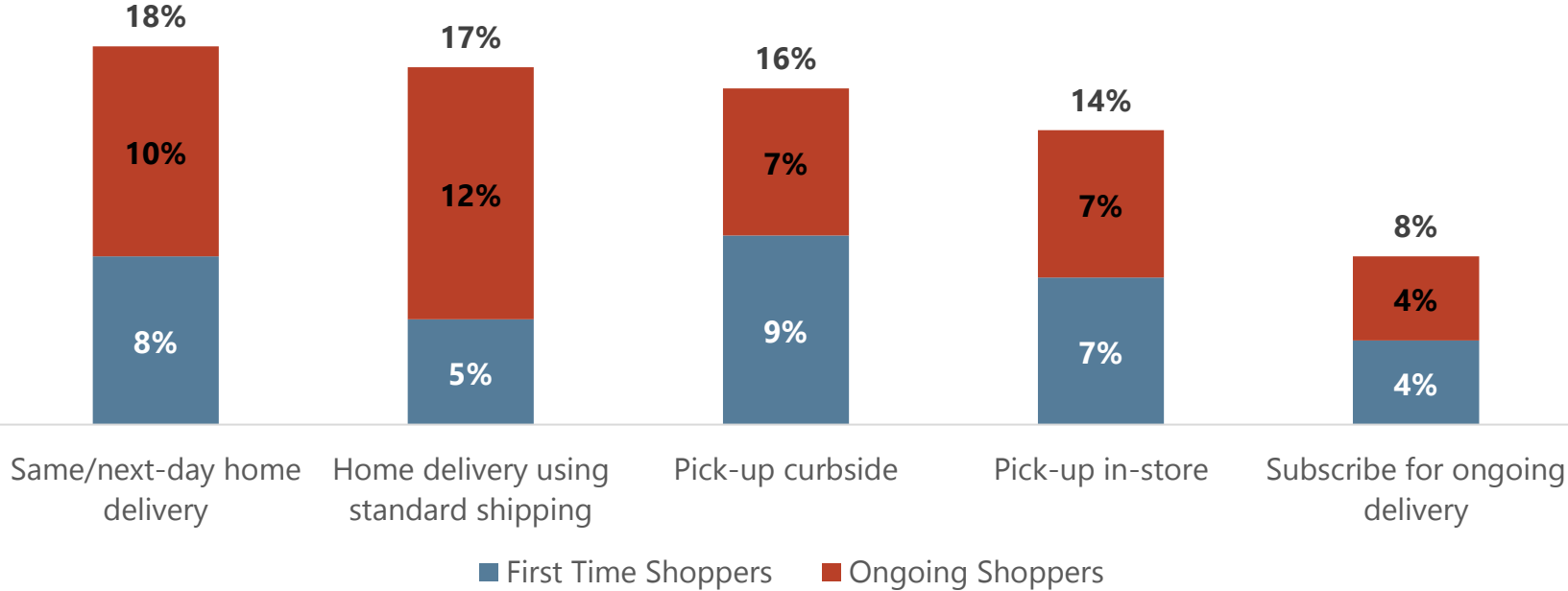


Products bought for first time online among online shoppers



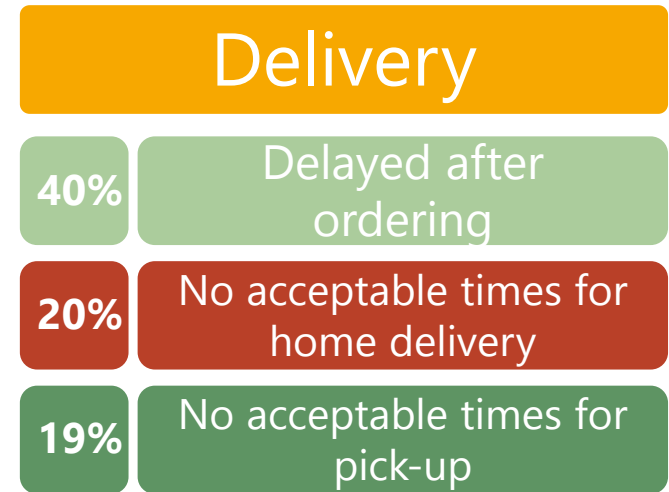
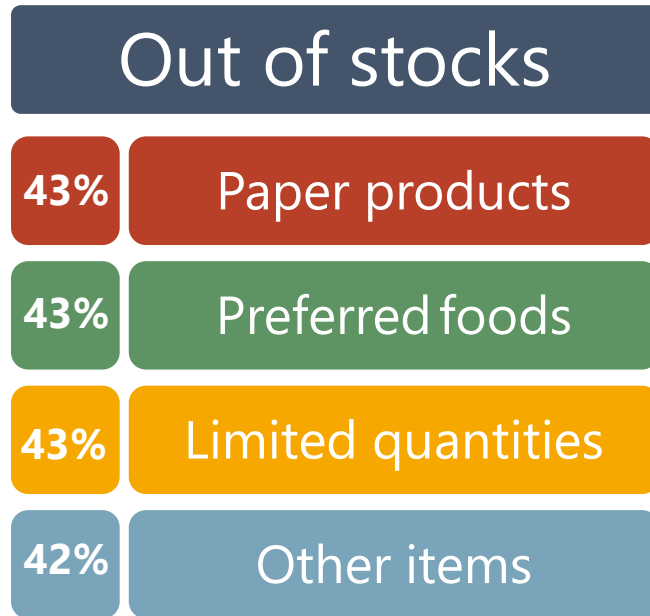
# The Evolving Role of Online Grocery Shopping

## Online Grocery Shopping Methods among all grocery shoppers



# The Evolving Role of Online Grocery Shopping

**84%**  
have  
encountered  
problems  
online  
shopping

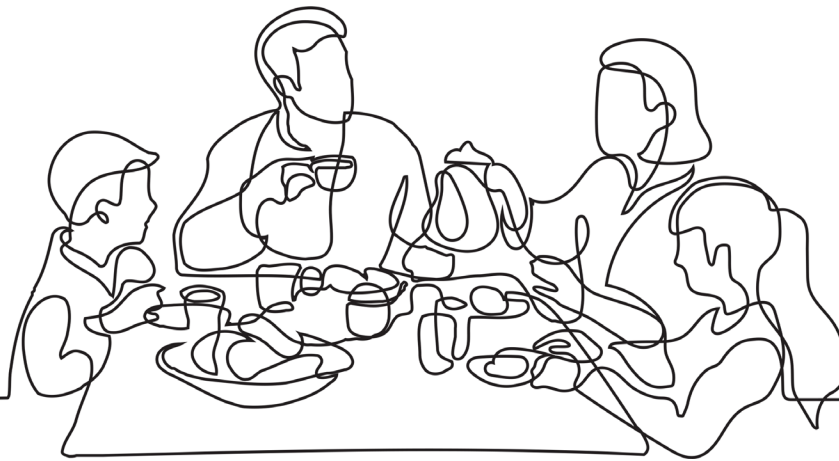


# Focus areas

Concerns about Feeding Families: March 28 - April 2

Latinx and Black Grocery Shoppers: April 4 - 9

Cooking and Eating Healthy During a Pandemic: April 15 - 25





# Concerns about Feeding Families

39%

report changes to household members or finances

27%

Reduced working hours or wages

10%

Lost job

7%

Change in who lives in household

5%

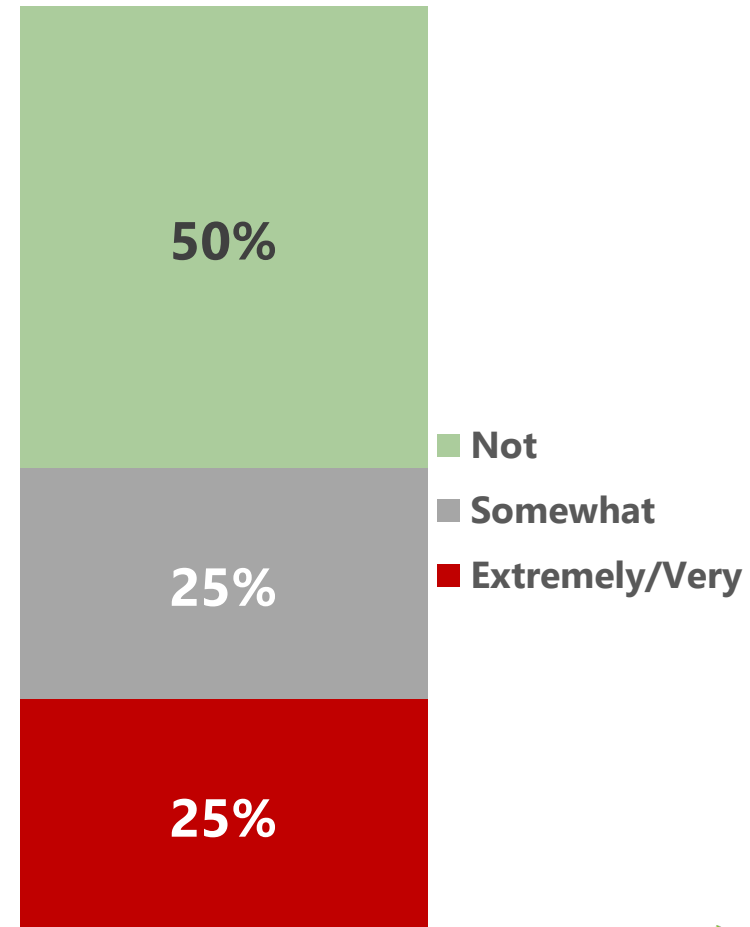
Living in different home

# Concerns about Feeding Families

**20%**  
of shoppers concerned  
about having enough  
money to pay for  
needed food.

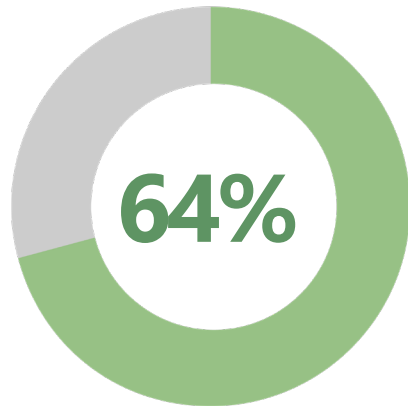


How concerned are you about having  
enough food for household



# Latinx and Black Shoppers Adjust their Grocery Shopping

Like U.S. grocery shoppers overall, Latinx and Black shoppers have adjusted their shopping patterns and priorities.

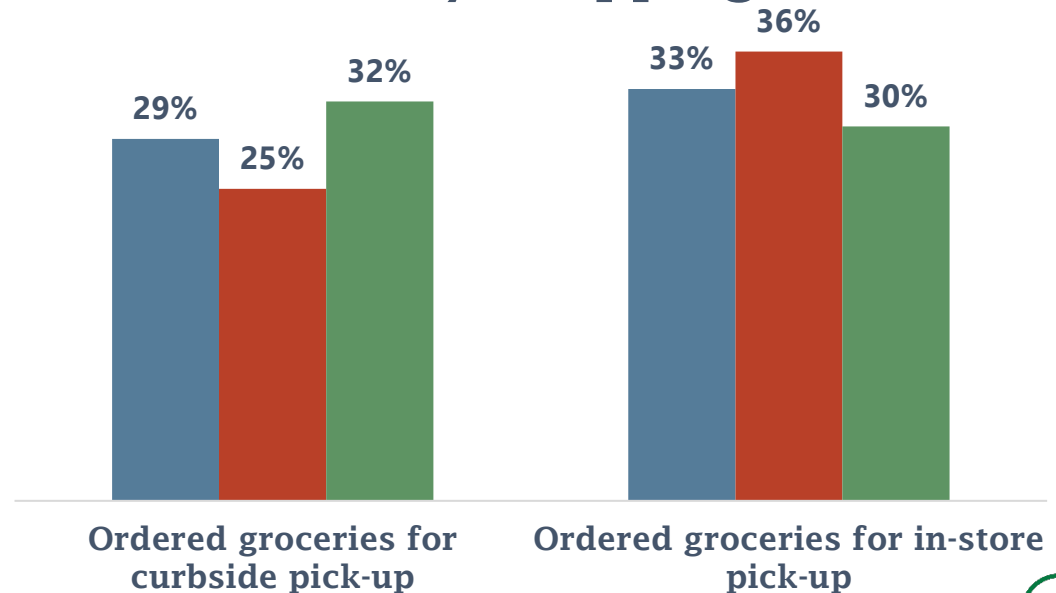


Latinx and Black grocery shoppers rate their primary store **between 8-10** on their response to COVID-19



have tried online shopping for the first time since the COVID-19 pandemic

## Online Grocery Shopping Methods



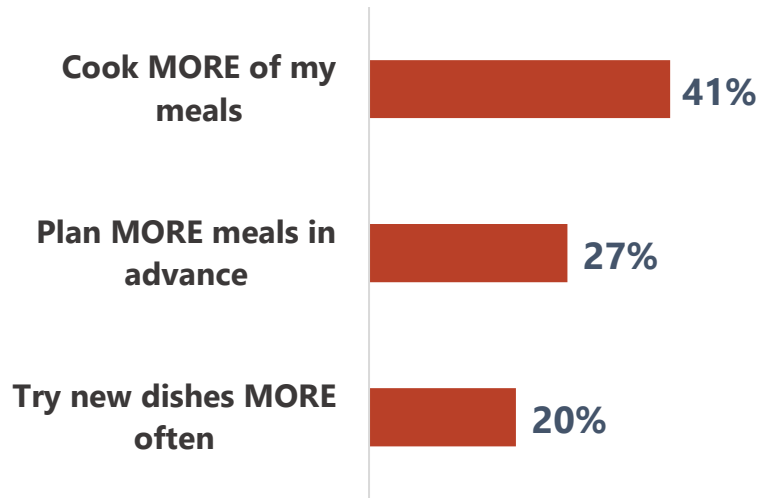
■ Latinx ■ Black ■ All Shoppers

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# Cooking and Eating Healthy During a Pandemic

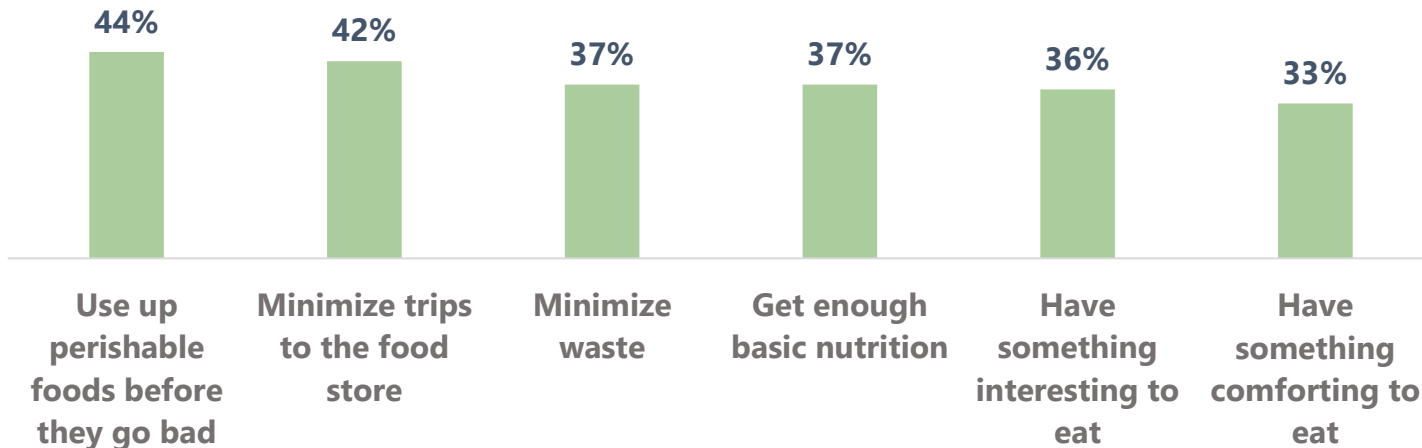
## Changes to how consumers eat



36% of shoppers report healthier eating habits, compared to before COVID-19 became a national concern.

Only 13% say their eating habits are less healthy now.

## Cooking priorities during the COVID-19 pandemic



# Grocery Stores Rising to Meet Shopper Needs



# Grocery Stores Rising to Meet Shopper Needs

## Shopper concerns:

70%

Getting ill

57%

Items out-of-stock

38%

Prices rising

## More likely to use a food retailer if:

78%

Sanitization (general, carts, checkout)

38%

Minimize/limit number of shoppers

33%

Special hours

32%

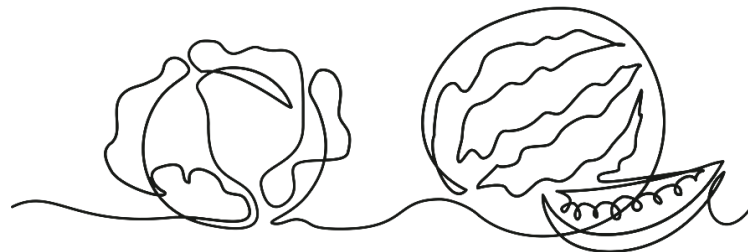
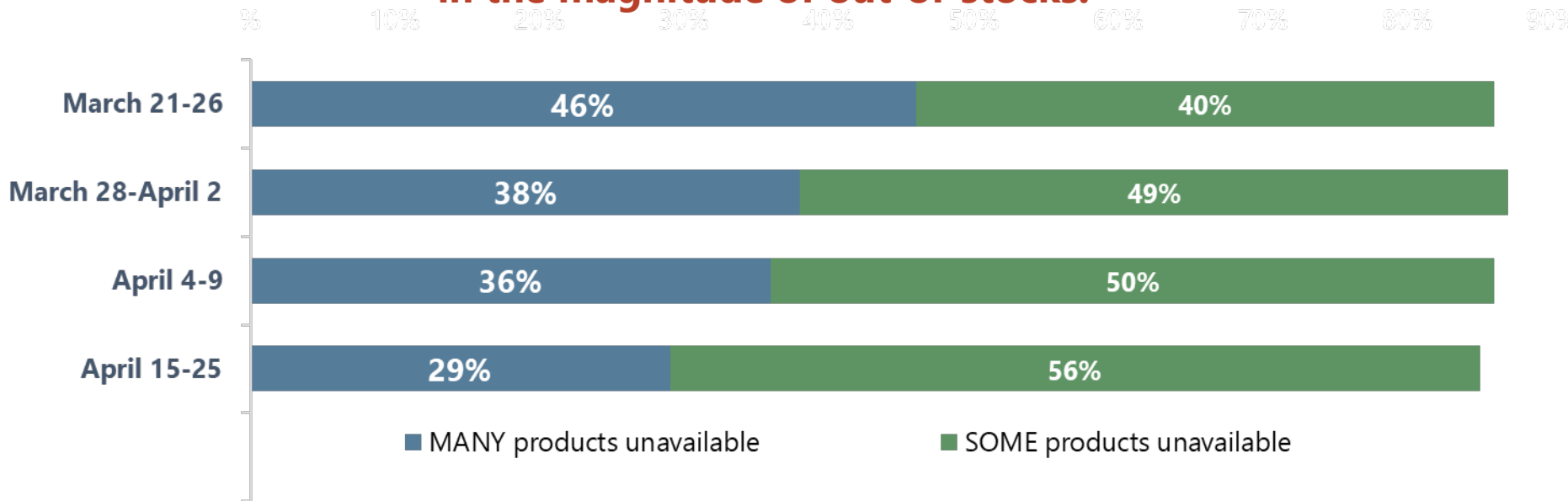
Minimize employee handling of food

30%

Provide fresh produce and meat

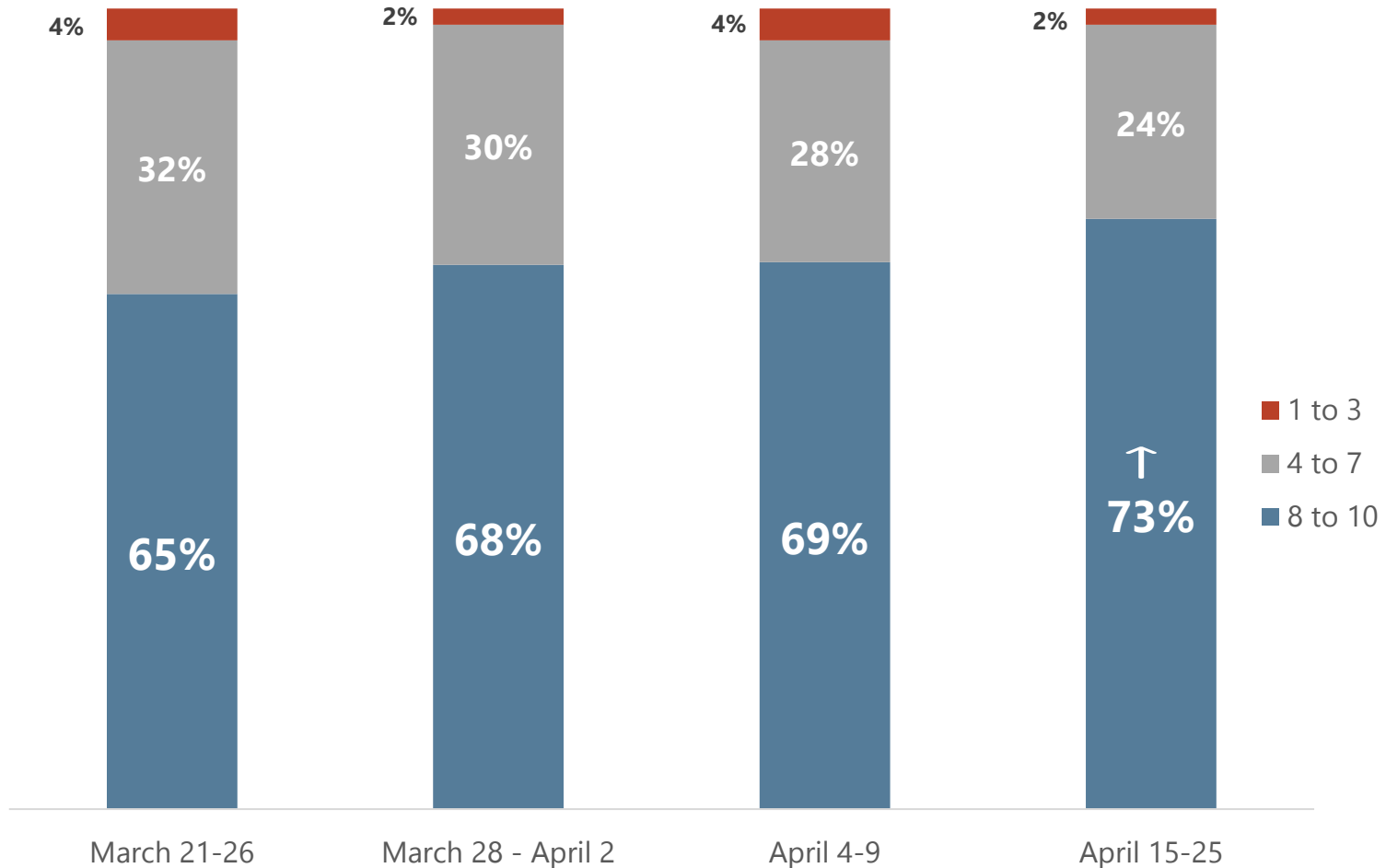
# Grocery Stores Rising to Meet Shopper Needs

**While some products remain unavailable, consumers report a decrease in the magnitude of out-of-stocks.**



# Grocery Stores Rising to Meet Shopper Needs

How would you rate your primary store's response to COVID-19?





# Grocery Stores Rising to Meet Shopper Needs

Check in stock  
Sanitary wipes  
Toilet paper  
Limit shoppers in store  
Online  
Hoarding  
Thank you  
Protect employees  
Masks for employees  
Delivery windows  
Great job  
Clean stores  
Out of stock  
Social distancing  
Special hours  
Shopping carts  
Limit items



# Q&A



# U.S. GROCERY SHOPPER TRENDS COVID-19 TRACKER

April 4-9, 2020



Thank you

