



Food & Supermarkets: Shopping Habits & Delivery Service

June, 2020



Background & Objectives

Over the last three months, daily habits and routines have been uprooted. As we enter the post COVID world, consumers will have new brand expectations. The question is, will current patterns and practices become permanent?

Provoke Insights works in a variety of industries, from technology and finance to food and luxury – the firm decided to launch a research initiative to understand the effects that the first half of 2020 has had on the consumer.

The goal of the research was to gain a national perspective on the mindset of consumers and what changes they have made in their behavior. The study covered 16 industries and surveyed general consumers as well as professionals.

The objectives of the research include:

- 1.** Understanding consumer behavior pre-, during, and post-COVID-19.
- 2.** Gaining feedback on shifting mindset/attitudes from March 2020 to when restrictions are lifted.

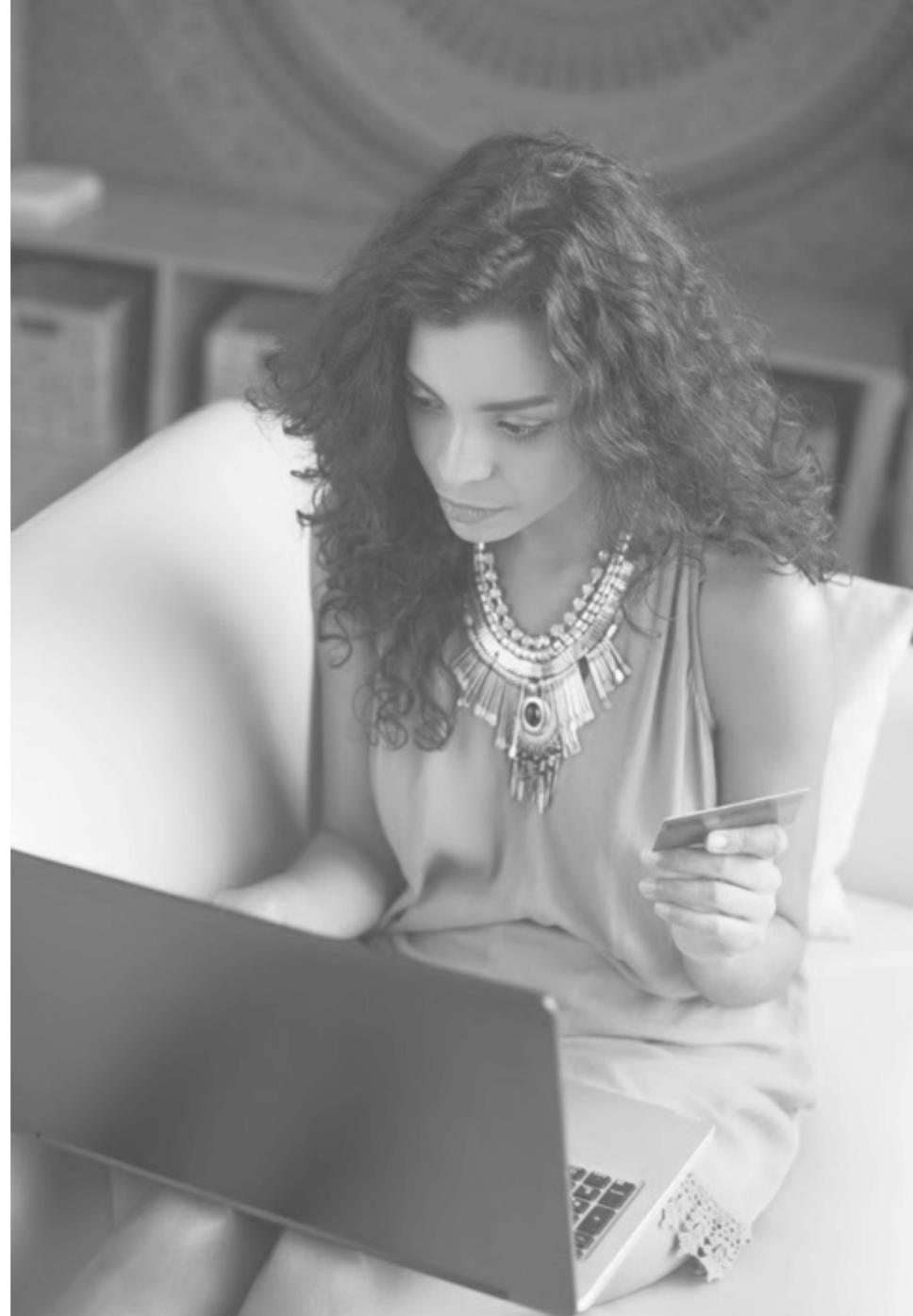
Methodology

Provoke Insights conducted a 10-minute survey among 600 U.S. consumers between the ages of 21 and 65. The study was in-field from June 5th to June 15th, 2020.

Sampling was matched to reflect 2019 U.S. Census data¹. A random stratified sample methodology was used to ensure a high degree of representation of the U.S. population (household income, age, gender, geography, and children in the household).

Statistical differences between subgroups were tested at a 95% confidence level.

¹ <https://data.census.gov/cedsci/table?t=Income%20and%20Poverty&tid=ACSST1Y2018.S1701&hidePreview=false&vintage=2018>



Overview



The majority of Americans (86%) have visited a grocery store in the last month. Of those who have not gone to a supermarket, over half are concerned about COVID-19 impacting their health.

Since the pandemic, consumers purchasing online groceries have soared, and this new trend is expected to stay post COVID-19.



In all supermarket categories, the amount of products purchased has increased; this is particularly true for cleaning items followed by fresh produce, meat, and salty snacks. The growth in fresh produce purchases is likely to remain high even after the pandemic. Ice cream is expected to have the most significant drop in sales, but that may be due to seasonality.

As over half of Americans are cooking and baking more often, their attitudes are changing as well:

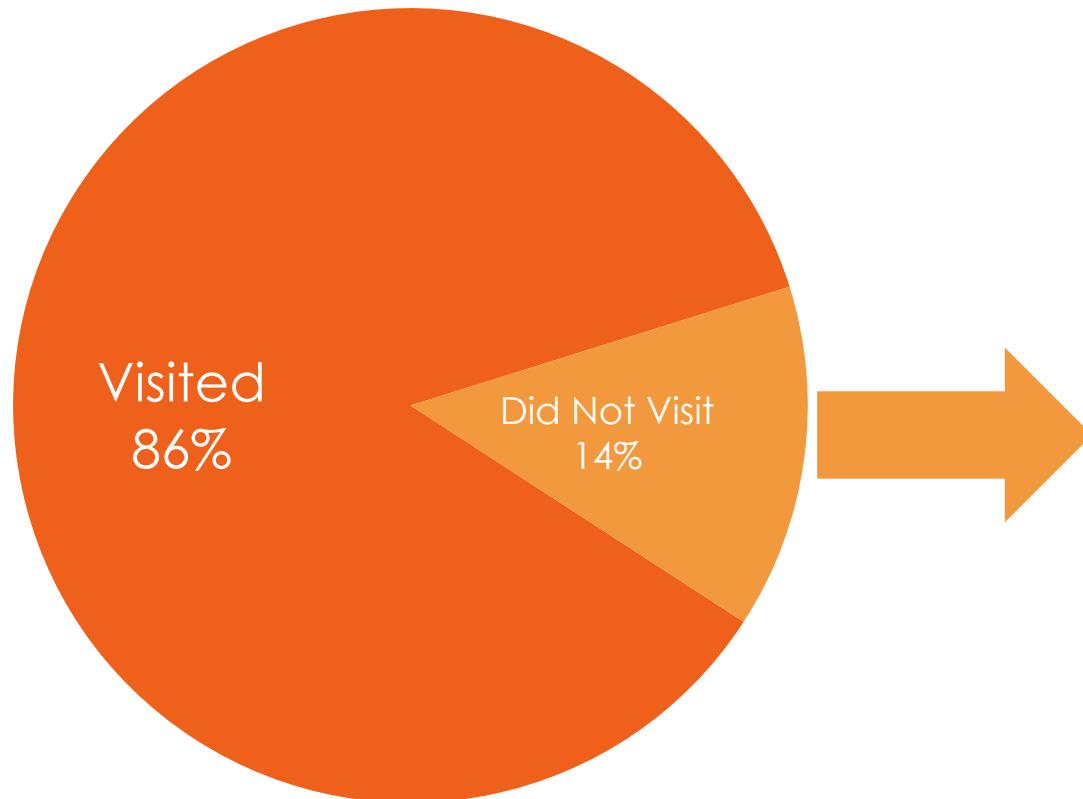


- 76% of people are trying to eat healthier
- 58% say their at-home meals are restaurant quality
- 55% of people have a more structured meal routine

While being at home has helped improve eating habits, over half of the people say they are snacking more often.

Continuing to Visit Grocery Stores

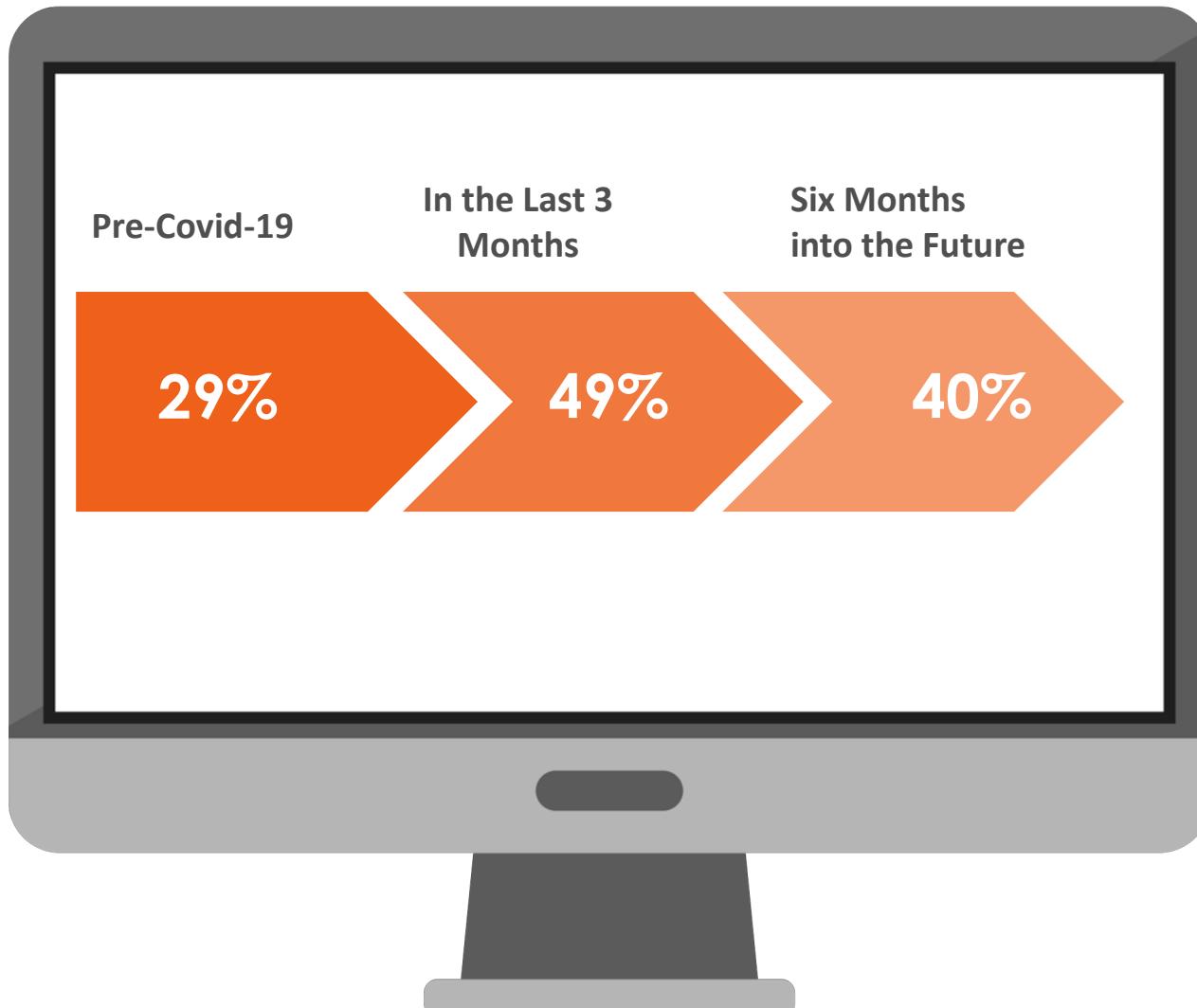
During the pandemic, most Americans are continuing to go to the supermarket.



55% of those who did not go to a store are concerned about Covid-19 impacting their health

Online Grocery Purchase Habits

Consumers purchasing online groceries have soared in the U.S., and this new trend is expected to stay post COVID-19.



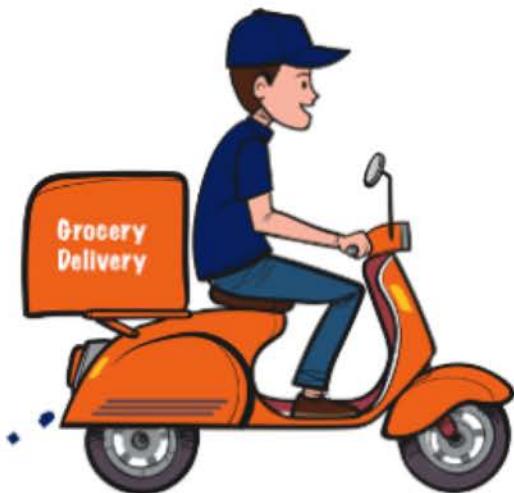
Grocery Delivery

The increased popularity of grocery delivery is expected to continue into the future.

Pre-Covid-19
19%

In the Last 3 Months
30%

Future
39%



Base: All respondents (N=600)

At Home Beverage Purchases

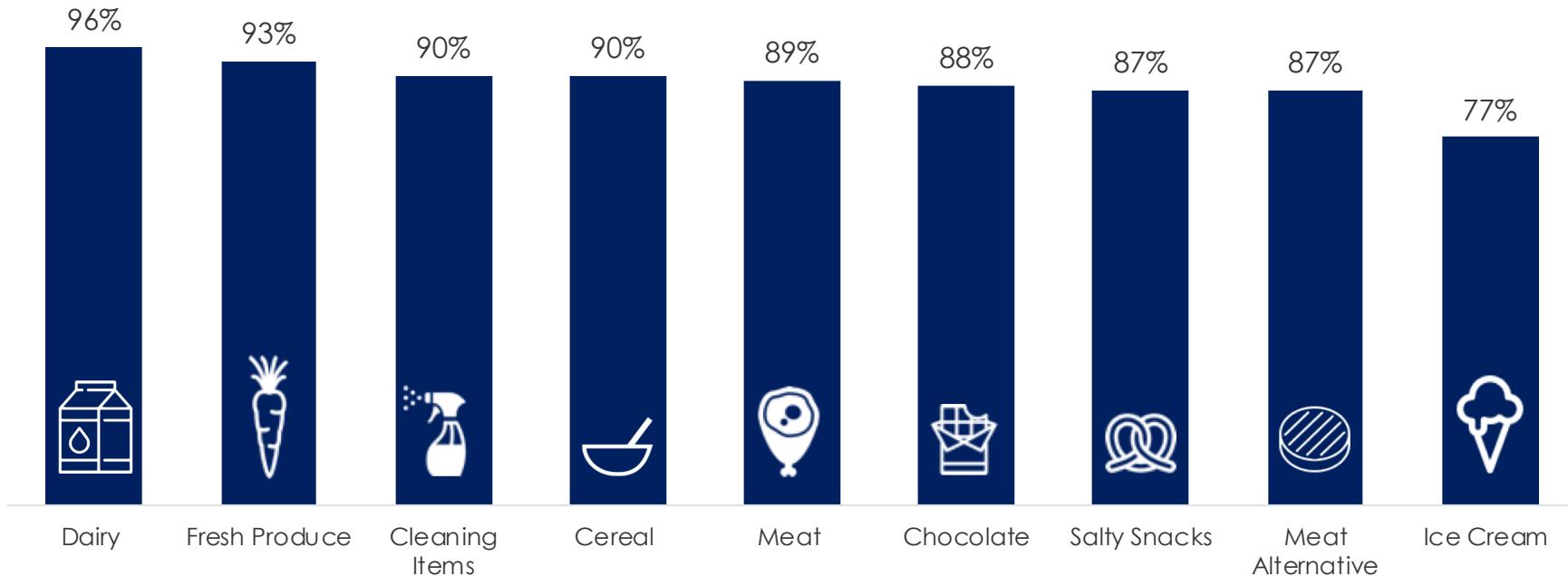
Compared to pre-COVID-19, purchasing coffee for the home surged.



Future Purchasing Habits

The growth in fresh produce purchases is expected to remain high after the pandemic. Ice cream is expected to have the largest drop in sales, but that may be due to seasonality.

Increased Frequency of Purchase Will Continue

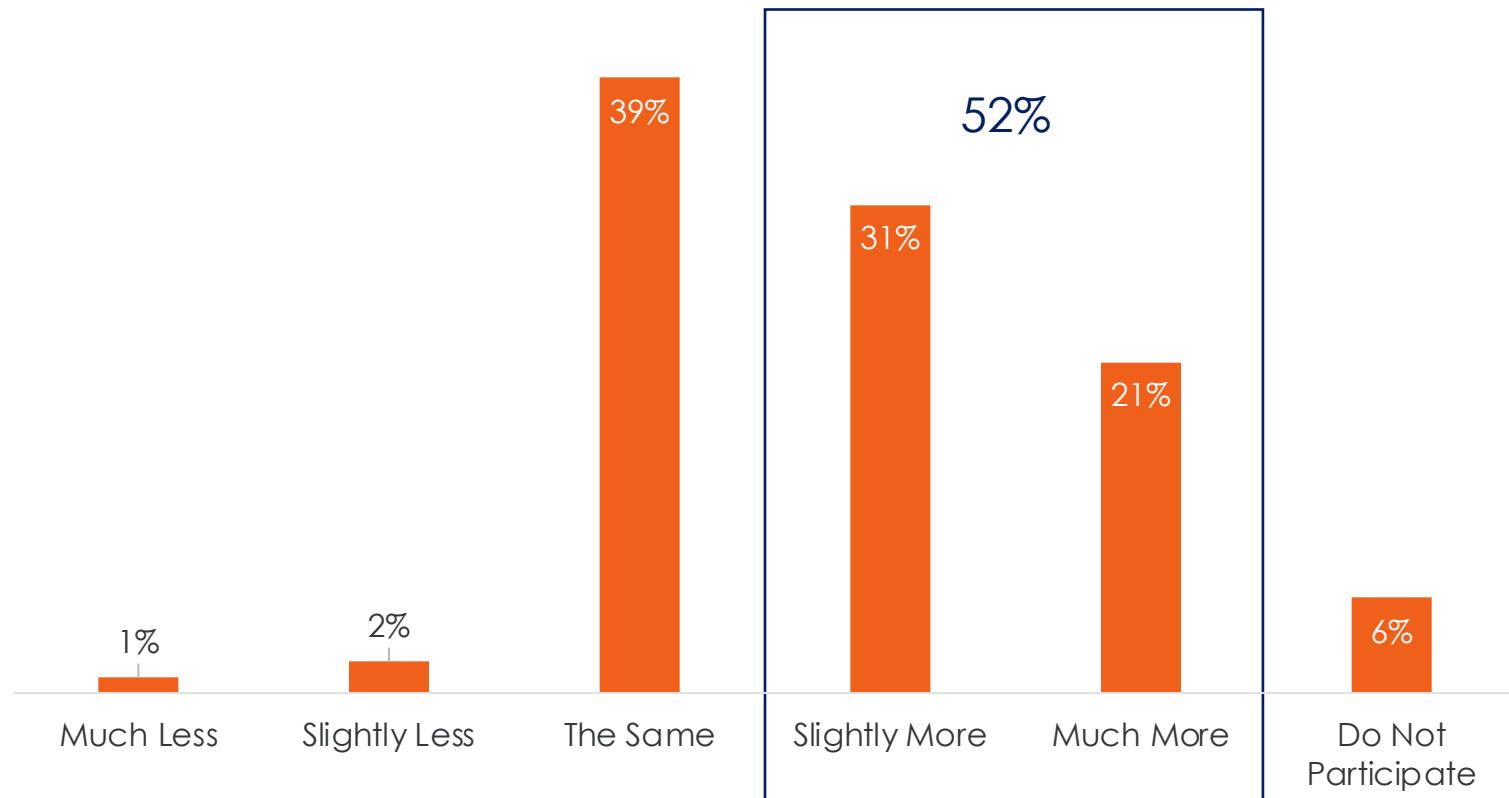


Q. Compared to Pre-COVID-19, what are your grocery purchasing habits? The amount I purchase is.. / Thinking about six months into the future, what do you think your grocery purchasing habits will be? The amount I purchase will be....

Base: Purchasing more of the item (Base size varies)

Cooking & Baking Frequency

Half of Americans say they are cooking and baking more often.



Attitudes Towards Eating

Top 2: Strongly Agree or Agree

The majority of Americans are eating healthier and over half say their eating restaurant quality meals.



76% are
Trying to Eat
Healthier



58% say
their at-home
meals are
restaurant
quality

Attitudes Towards Eating

Top 2: Strongly Agree or Agree

Eating habits have changed due to the impact of Covid-19.



55% are
snacking
more often

