hartman GROUP

FMI THE FOOD INDUSTRY ASSOCIATION

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

April 29-May 10, 2020

# Introduction

To assess the impact of COVID-19 on **U.S. grocery shopper perceptions and behaviors**, FMI is conducting online tracking surveys. This report represents findings from the first five waves of research. Future waves of research will continue to provide deeper insight and track evolving areas of concern, evaluation of and priorities expected from grocery retailers, and changing patterns in the where/what/who/how of grocery shopping, all rooted in the broader public situation as it unfolds.  For this wave's report, analysis on area of residence (urban, suburban and rural) is based on self reported data.

These findings are based on responses from:

**N=1,020 U.S. adults**, **April 29 – May 10, 2020**

Some comparisons are made to responses collected in prior waves, i.e., March 21 – 26 (n=1,027), March 28 – April 2, (n=1,036), April 4 – 9 (n=1,033) and April 15 – 25 (1,027).

Each week's sample has been balanced for U.S. Census in terms of age, gender, U.S. Census region, household income and race/ethnicity. Further details on methodology can be found at the conclusion of this document.

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FMI
As the food industry association, FMI works with and on behalf of the entire industry to advance a safer, healthier and more efficient consumer food supply chain. FMI brings together a wide range of members across the value chain — from retailers that sell to consumers, to producers that supply food and other products, as well as the wide variety of companies providing critical services — to amplify the collective work of the industry.
www.FMI.org.

THE HARTMAN GROUP
Since 1989, The Hartman Group, Inc., based in Bellevue, Washington, has been immersed in the study of American food and beverage culture, using ethnographic observation, quantitative tracking surveys and deep study of trends to understand the subtle complexities of consumer and shopper behaviors.
www.Hartman-group.com

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## U.S. GROCERY SHOPPER TRENDS COVID-19 TRACKER
# HIGHLIGHTS FROM APRIL 29 – MAY 10, 2020

**Consumer concern about COVID-19 and its impact on food for the home continues to decline from its peak level measured in early April, even as many Americans remain worried about disruptions to their access to food and groceries.**

- 63% are extremely/very concerned about COVID-19 in general (down from 69% in mid-April and 74% in early April).
- 21% worry specifically about having enough money for food, and 17% say making ends meet is a priority when cooking (both down from 26% in late March).
- Concerns have shifted from consumers' own ability to pay and temporary out-of-stocks to a broader concern about the supply chain as a whole.

**The pandemic has prompted an evolution in the habits and skills of urbanites, especially younger adults, more dramatic than for suburban or rural residents.**

- Shoppers of all ages tend to experience food retail as a part of urban food life, with urban residents far more likely to say they "love" shopping for groceries.
- With most still living in places without access to dine-in restaurants, city residents, especially younger adults, are more likely to have been:
    - Learning new cooking skills (37% of urbanites, vs. 22% overall).
    - Enjoying eating more (34%, vs. 28% overall).
    - Learning how better to plan meals across the week (32%, vs. 26% overall).
- They have also gained experience relying on online options for their groceries more frequently.
- Across all geographies and generations and regardless of any new culinary learning, many adults report cooking more of their own meals (42%), planning more in advance (26%), and more successfully avoiding food waste (37%).

**An overwhelming majority of Americans expect some of their COVID-19 shopping habits to continue to some degree once the pandemic becomes less of a concern. They especially intend to continue to cook more than they had been.**

- Seven-out-of-eight (88%) adults expect at least some persistent change to their food habits, with expected shifts to cooking, dining, shopping and/or household food management.
- Almost half of adults (49%) expect to prepare meals at home more frequently, and large numbers (38%) expect to eat out less. This holds true across generations, but even more so for younger adults.
- Most Americans (57%) anticipate reverting to pre-pandemic behaviors when it comes to online grocery retail, though about one-fourth (27%) expect to use delivery more.
- On the other hand, only one-fourth (28%) expect to visit stores more, and most foresee no persistent pandemic-driven reliance on options to pick up after ordering online.
- In sum, far more Americans say they expect to cook more and eat out less than say they will visit stores more or order online more. **They may not yet have a clear picture of *how* they will access food retail moving forward, but the expectation and intent is there to rely more on food for the home.**

# Week-over-week trends:
## Extreme levels of concern about COVID-19 have fallen, but consumers still worry about the supply chain

**Fielded:** March 21 – March 26 | March 28 - April 2 | April 4 – April 9 | April 15 – April 25 | April 29 – May 10

Consumer concerns about COVID-19 in general, and ability to pay for food specifically, continue to fall. However, despite fewer actual out-of-stock experiences, early May still sees many consumers worried about finding specific items they need (59%) and about the supply chain as a whole (49%).

**CHART 1: OVERALL CONCERN ABOUT COVID-19**

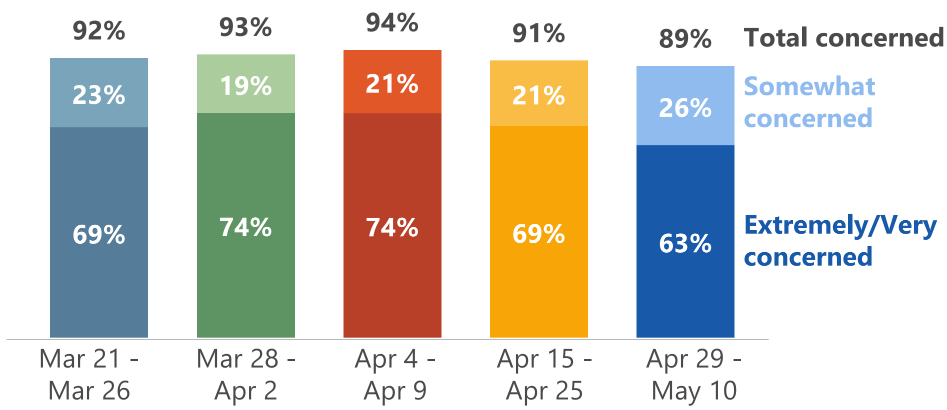



**CHART 2: CONCERNS ABOUT ABILITY TO PAY FOR FOOD & OUT-OF-STOCK ITEMS**

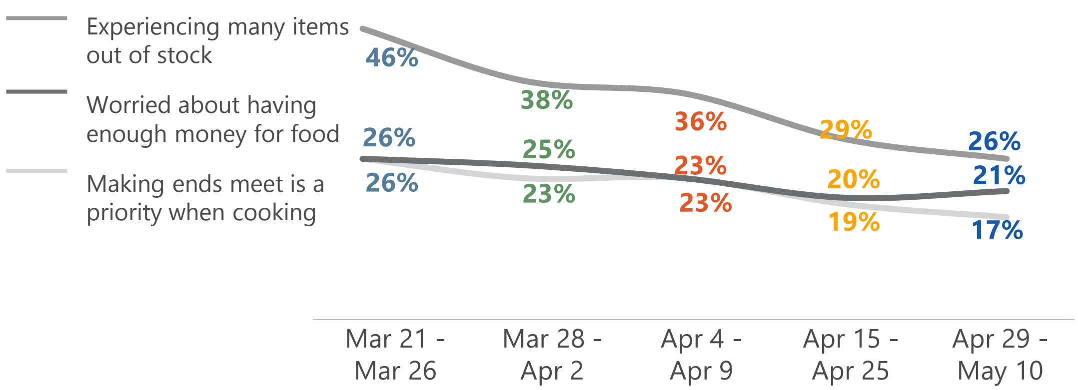
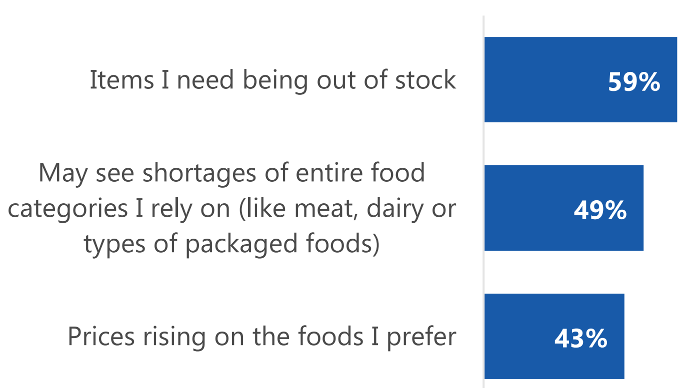



**CHART 3: CONCERNS ABOUT ABILITY TO PAY FOR FOOD & OUT-OF-STOCK ITEMS**




How concerned are you, if at all, about the coronavirus or COVID-19 outbreak? Individual waves Total N=1,027/1,036/1,033/1,027/1,020. Which of the following best describes food availability in the food stores in your area in the last few days? Do not include online retailers, like Amazon. Wave 5 Total N=1,020. When you obtain food for your home nowadays, which of these potential problems would you say you are especially concerned about? Wave 5 Total N=1,020. When you have cooked at home this past week, what were your priorities when you decided what to cook? Wave 5 Total N=1,020. When you obtain food for your home nowadays, which of these potential problems would you say you are especially concerned about? Wave 5 Total N=1,020. What specific concerns do you have, if any, about your ability to have food for your household in the coming weeks? Wave 5 Total N=1,020.

# Newly formed habits:
## Urbanites have been more engaged with foods and more likely to develop new skills and habits during COVID-19

Over the course of the COVID-19 pandemic to date, urban residents, especially younger generations, have said they enjoy grocery shopping far more than suburban or rural residents. They are also more likely to say they have enjoyed eating more during the COVID-19 pandemic.

**CHART 4:**
**ENJOYMENT OF GROCERY SHOPPING**

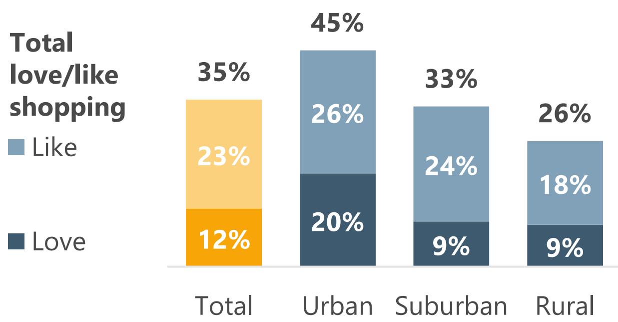
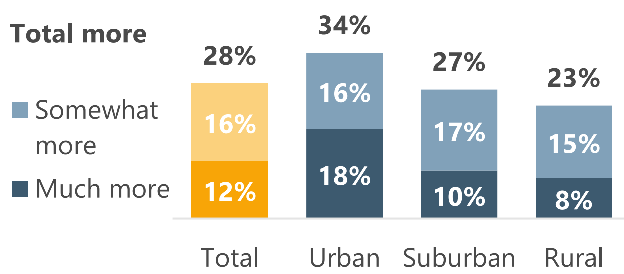
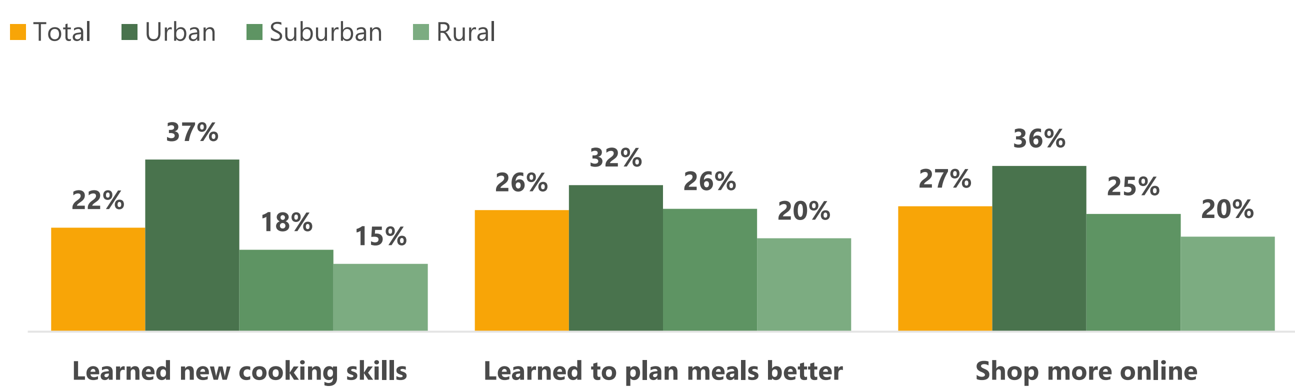



**CHART 5:**
**ENJOYMENT OF EATING DURING COVID-19**




Consumers report having acquired new food-related skills and habits since the onset of the pandemic. Urban dwellers in particular, especially younger adults, report having learned new skills such as cooking meals and meal planning. They have also gained experience relying on online options for a greater share of their groceries.

**CHART 6: NEW HABITS GAINED UNDER COVID-19**




Which of the following best describes your attitude toward grocery shopping? Wave 5 Total N=1,020, Urban N=292, Suburban=454, Rural N=274. Compared to before the coronavirus pandemic became a national concern, would you say you now...[enjoy eating more/less / have learned new cooking skills / have learned how to plan meals better across the week]? Wave 5 Total N=1,020, Urban N=292, Suburban=454, Rural N=274. In what ways has the coronavirus epidemic changed WHERE YOU SHOP FOR FOOD, compared to before the epidemic became a concern in your area? Wave 5 Total N=1,020, Urban N=292, Suburban=454, Rural N=274.

# Future food procurement:
## Consumers, especially younger adults, expect to sustain some of their new habits past the current peak pandemic

Eighty-eight percent of consumers expect that at least something about how they get food on the table (cooking vs. eating out, shopping in-store vs. online) will change in the future, once concerns about COVID-19 abate. Younger consumers tend to foresee several lasting changes to their food lives in higher numbers than older adults, especially Boomers.

**CHART 9: FUTURE FOOD & GROCERY EXPECTATIONS: COOKING AT HOME**

**Compared to before the pandemic, I expect to prepare meals at home…**

- 8% LESS than before
- 43% Same as before
- 49% MORE than before

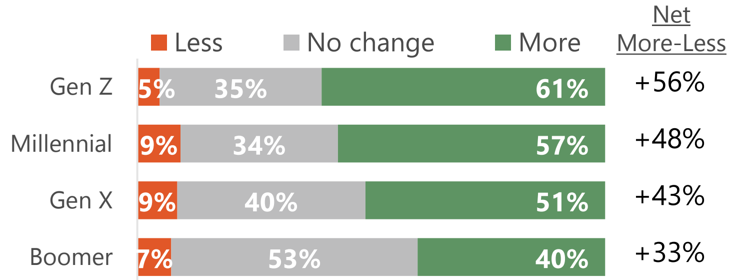



**CHART 9: FUTURE FOOD & GROCERY EXPECTATIONS: EATING OUT AT RESTAURANTS**

**Compared to before the pandemic, I expect to eat out at restaurants…**

- 38% LESS than before
- 37% Same as before
- 25% MORE than before

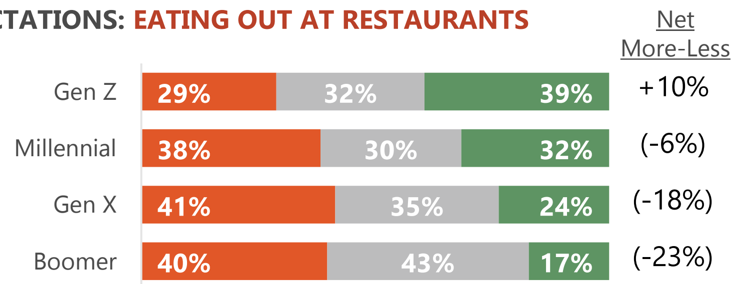



**CHART 9: FUTURE FOOD & GROCERY EXPECTATIONS: GROCERY SHOPPING IN-STORE**

**Compared to before the pandemic, I expect to visit grocery stores…**

- 22% LESS than before
- 50% Same as before
- 28% MORE than before

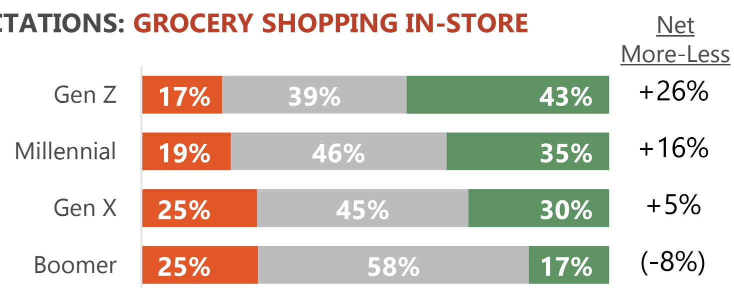


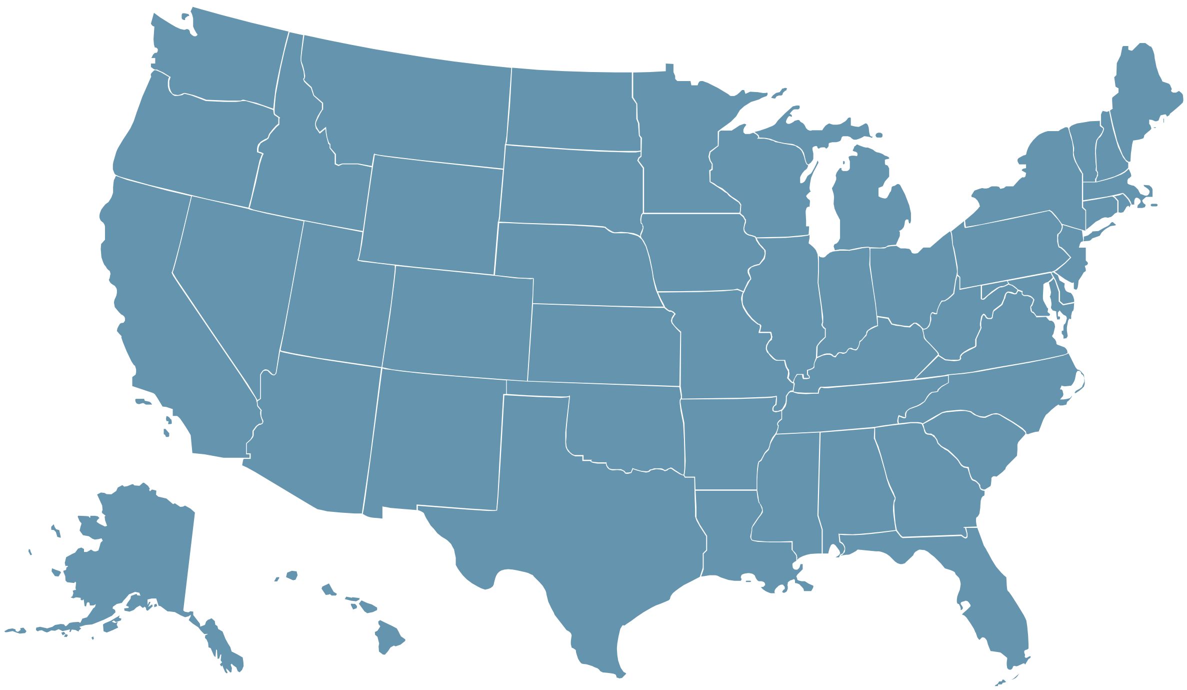

**CHART 9: 56 FUTURE FOOD & GROCERY EXPECTATIONS: GROCERY SHOPPING ONLINE**

**Compared to before the pandemic, I expect to order online for delivery…**

- 16% LESS than before
- 57% Same as before
- 27% MORE than before


Imagine a future when your community is able to be far less concerned about the coronavirus, and businesses are able to resume normal hours and practices. How do you expect your own habits and behaviors to have changed, compared to before the current pandemic became a problem. Do you expect you will...? Wave 5 Total N=1,020, Gen Z N=104., Millennial N=282, Gen X N=246, Boomer N=332.

# Methodology



Data used in this report comes from five survey waves fielded online among a national sample, including 1,027 adults in Wave 1 (March 21-26), 1,036 in Wave 2 (March 28 – April 2), 1,033 in Wave 3 (April 4-9), 1,027 in Wave 4 (April 15-25) and 1,020 in Wave 5 (April 29 – May 10). In each wave of research, half of responses were collected during weekdays and half during the weekend.

Each wave was recruited from research panels, closely matching U.S. Census on key demographic distributions.

| | | Total | Wave 5 |
|---|---|---|---|
| Gender | Male | 47% | 47% |
| | Female | 53% | 53% |
| Age | 18-24 | 12% | 12% |
| | 25-34 | 18% | 17% |
| | 35-49 | 24% | 24% |
| | 50-59 | 17% | 16% |
| | 60-74 | 25% | 25% |
| | 75+ | 5% | 5% |
| U.S. region | East | 18% | 18% |
| | South | 38% | 37% |
| | Midwest | 20% | 21% |
| | West | 24% | 23% |

| | | Total | Wave 5 |
|---|---|---|---|
| Household structure | Single-person household | 27% | 28% |
| | Multi-person household, kids present | 24% | 23% |
| | Multi-person household, adults only | 48% | 50% |
| Household income in 2019 | Less than $15,000 | 7% | 7% |
| | $15,000 to less than $35,000 | 18% | 18% |
| | $35,000 to less than $50,000 | 14% | 14% |
| | $50,000 to less than $100,000 | 32% | 32% |
| | $100,000 or more | 28% | 29% |
| Race/Ethnicity | Caucasian (only) | 63% | 63% |
| | Latinx | 13% | 13% |
| | Black/African-American | 14% | 15% |
| | Other | 9% | 9% |

*Percentages may not add up to 100% because of rounding.*

This week's report uses responses tracked across the individual five waves of research and new questions asked in Wave 5 only (shown as total and by generational cohorts), with sample sizes indicated on each page.

According to the conventions of probability sampling, the complete sample for each wave of research enables weekly estimates with a sampling error of no more than ±3% at the 95% confidence level.

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