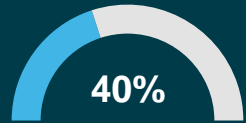


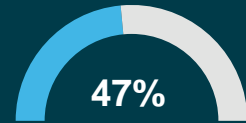
THE COVID-19 PANDEMIC HAS PUSHED CONSUMERS INTO NEW SHOPPING AND EATING BEHAVIORS – THE QUESTION IS: WHAT WILL “NEW NORMAL” LOOK LIKE?

A Burke-conducted survey from April 1-April 5, 2020 captures an early snapshot of behaviors and concerns among US Adults and Household Shoppers

FINANCIAL DIFFICULTIES HAVE HAD AN IMPACT ON SPENDING



40% OF US ADULTS SUFFERED A JOB LOSS OR PAY REDUCTION IN MARCH



47% EXPECT HH INCOME TO DECREASE OVER THE NEXT 6 MONTHS



86% ARE VERY/SOMEWHAT CONCERNED ABOUT THE ECONOMY
(Level of concern is unaffected by gender, age, income or region)

SINCE THE START OF THE PANDEMIC... *(definitely/somewhat agree)*

	March Job Loss/Pay Reduction	No March Job Loss/Pay Reduction
I am looking at product prices more closely	52%	35%
I am researching my purchases more	39%	28%
I have bought brands I have never tried before	47%	33%
I am reconsidering my usual brands	40%	26%



Personal financial challenges and general economic concerns have made consumers **more spending conscious**, especially those with recent income loss. Early indicators suggest **consumer concerns will continue for some time after restrictions are lifted**.

IN THE FUTURE AS A RESULT OF THE PANDEMIC...



72% Expect to limit household spending



67% Expect to refrain from buying non-essential products

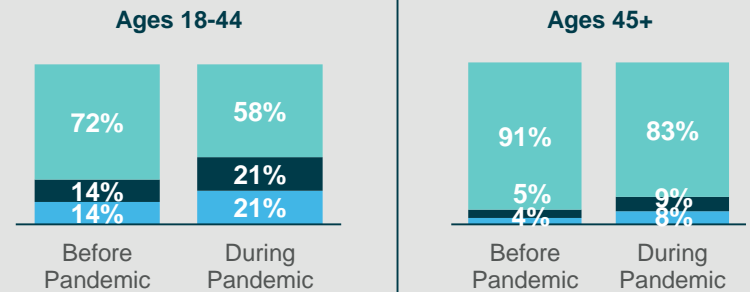


64% Expect to hold off on a large, previously planned purchase

THE PANDEMIC HAS SHIFTED SOME SHOPPING TRIPS ONLINE

TYPE OF FOOD SHOPPING TRIPS

In-Store
Online with Store Pick-up
Online with Home Delivery



Among all shoppers, **11% of food shopping trips have shifted online since the shutdown**. Younger shoppers were more likely to make the shift. **Online Shopping/Home Delivery** and **Online Shopping/Store Pick-Up** capture **equal share** of the trips shifted away from In-Store.

THE COVID-19 PANDEMIC HAS PUSHED CONSUMERS INTO NEW SHOPPING AND EATING BEHAVIORS – THE QUESTION IS: WHAT WILL “NEW NORMAL” LOOK LIKE?

A Burke-conducted survey from April 1-April 5, 2020 captures an early snapshot of behaviors and concerns among US Adults and Household Shoppers

CHANGES IN SHOPPING BEHAVIORS

COVID-19 seems to have caused a *shift toward Center Store*.

Shoppers have adapted to panic shortages, out-of-stocks, and less frequent store trips by *buying what's available and shifting consumption*. They are also engaging in more stock-up behavior, even on items they don't normally buy.

When shelf stocks and trip frequency return to normal post-pandemic, *Center Store sales will likely return to pre-pandemic levels*. Additionally, there *may be some temporary dips as shoppers move through products they have on-hand*.

Most shoppers have experienced out-of-stocks on the products they wanted.

73% of shoppers are unable to purchase some **food items** due to out-of-stocks.

70% of shoppers are unable to purchase some **non-food items** due to out-of-stocks.



1 in 3 shoppers are stocking up on things they normally do not buy.

CHANGES IN EATING BEHAVIORS

Eating habits have changed during the shutdown. Some change is based on *adapting to what is available or what has longer shelf life* in consumers' pantries.

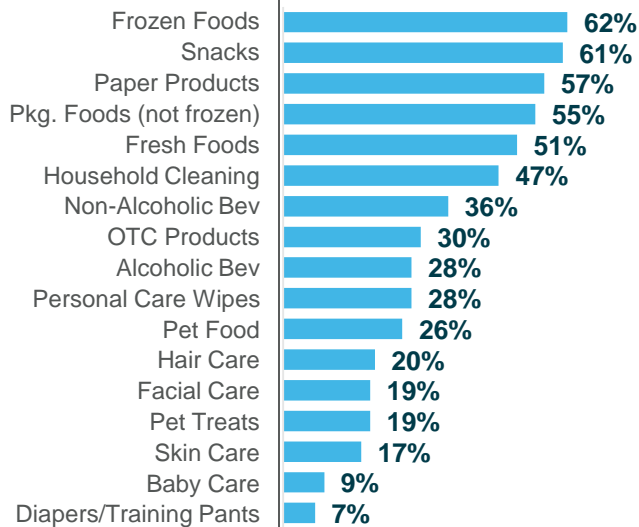
Other eating behaviors are due to *lifestyle changes* under stay at home restrictions or for *managing stress or anxiety*.

Some of these behaviors *may become habits the longer people stay at home*.

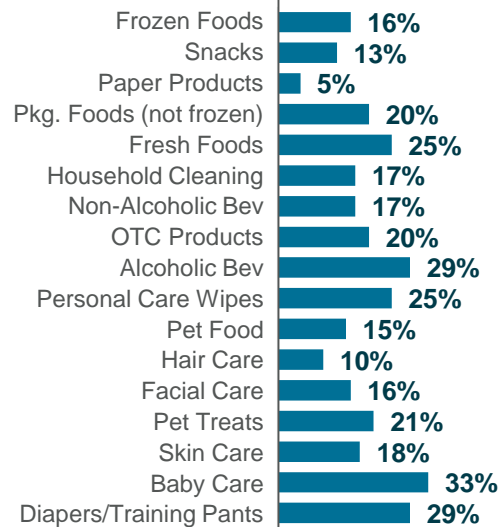
STOCK UP BEHAVIOR DURING THE COVID-19 PANDEMIC



% OF ALL SHOPPERS STOCKING UP ON CATEGORY SINCE THE PANDEMIC



AMONG THOSE WHO STOCKED UP, % THAT ARE NEW TO BEHAVIOR



CHANGES IN EATING HABITS

46% Have eaten more shelf stable food than usual

31% Have eaten more frozen food than usual

31% Are indulging more in the things they eat

29% Have eaten healthier foods than usual

COPING WITH STRESS/ANXIETY VIA FOOD

68% Eat healthy/fresh foods

67% Eat salty snacks

60% Eat sweets

53% Eat indulgent/comfort foods

38% Consume alcoholic beverages

20% Chew gum