

# COVID Consumer Journey: *Passive to Panic*



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Research conducted Dec 30, 2020-Jan 4, 2021

## Shopping Behaviors Changed Dramatically During the COVID-19 Pandemic

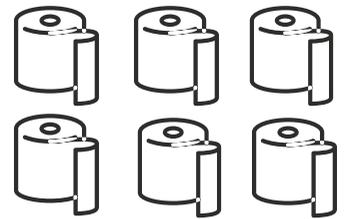
"Wearing protective gear"

"Stocking up on essentials and goods"

"Ordering everything I need online"

"Spending less time in crowded stores"

"Buying bathroom paper in bulk"



## But Not Everyone Stocked up on Toilet Paper

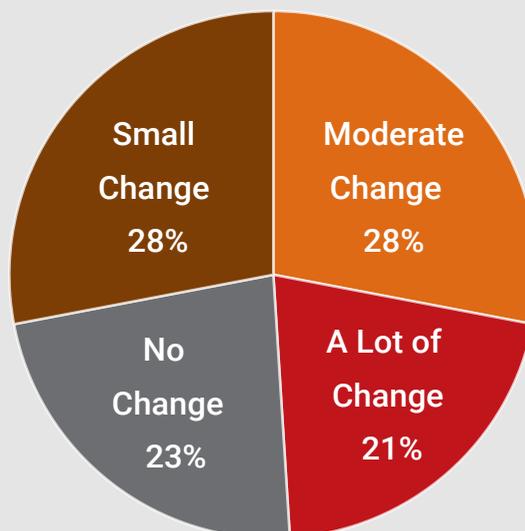
*Four segments of shoppers emerged during the pandemic*

### Social Distancers

- Small changes in shopping habits
- Following the new rules
- Buying more groceries than usual
- Millennial families/employed

### Staying the Course

- No real change in shopping habits
- Less overall COVID concern
- Still shopping at stores/still going out
- Younger/male/employed



### Hunkering Down

- Moderate level of change
- Shopping less, spending less
- Shopping different days/times
- Older/retired or unemployed

### Panic Button

- Significant and swift changes
- High COVID concern and pessimism
- Stocked up, shifted online
- Gen X families or older w/o kids

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# The Key Shifts in Grocery Shopping Centered on Stocking up, Shopping Less and Buying More Online

**Social Distancers**

**Hunkering Down**

**Panic Button**

**% Stocking Up**

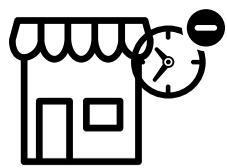


39%

30%

94%

**% Shopping Less**



15%

80%

46%

**% Shopping More Online**



25%

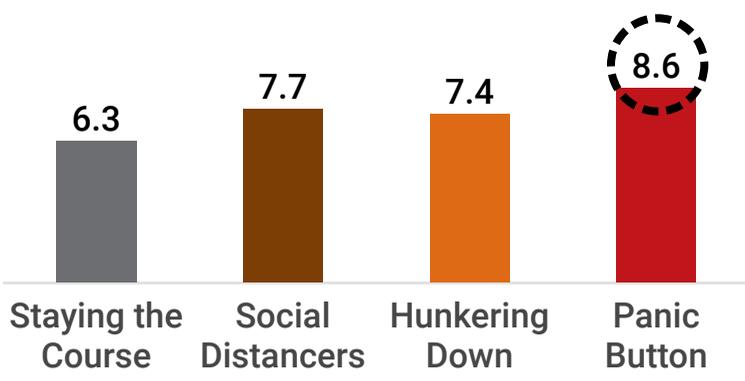
35%

63%

## COVID Concern and Optimism Are Commensurate With Changing Shopping Habits

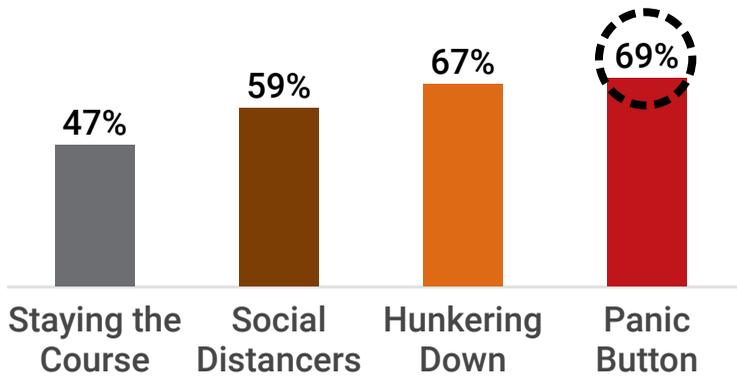
**COVID Concern Level**

(scale of 1-10 where 10 = Extremely Concerned)



**% Saying Return to Normal Is**

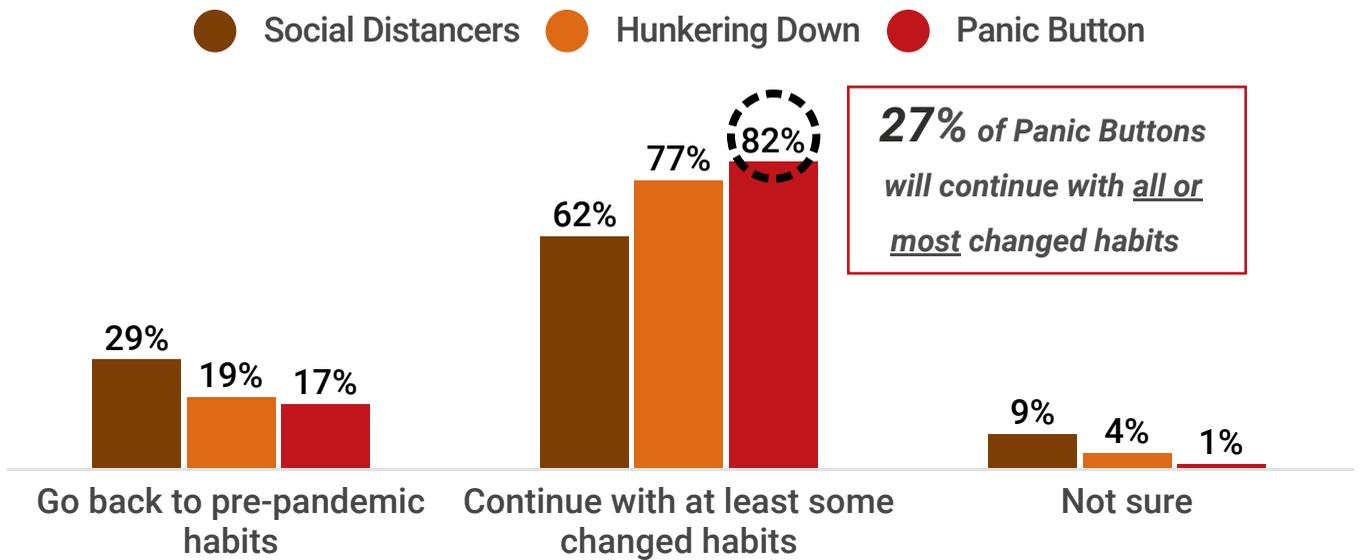
**6+ Months Away**



A Lot of Change = High Concern

A Lot of Change = Pessimism

# Post-COVID, Many Shoppers Will Continue With New Habits, Especially Those Who Changed the Most



## Shopper Priorities Will Shift Post-COVID

*What will be most important when shopping post-COVID?*

Index to All Shoppers

	ALL	Staying the Course	Social Distancers	Hunkering Down	Panic Button
Product Availability	60%	97	95	101	110
Lower Prices	52%	118	100	106	72
Customer Safety	42%	64	109	98	131
Convenience	34%	109	93	102	97
Promotions	33%	97	99	117	82
Fast Checkout	28%	97	109	92	101
Good Customer Service	22%	138	114	82	62
Option for Delivery	15%	101	76	108	118
Option for Pickup	14%	90	103	71	146