

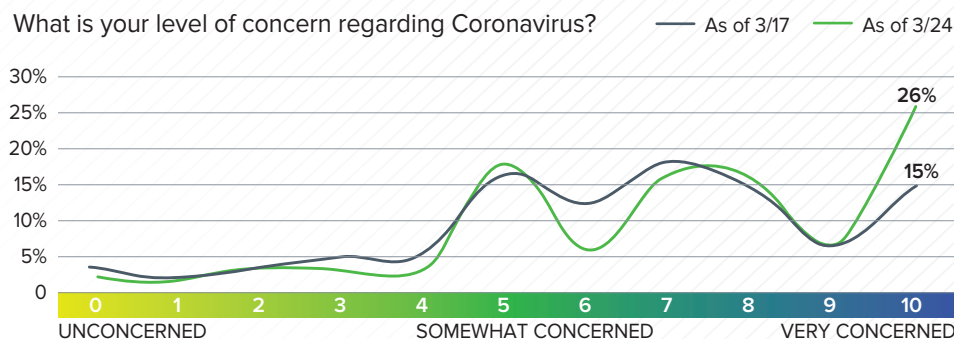
# COVID-19

## CPG INDUSTRY UPDATE



MARCH 30, 2020 EDITION

### Shoppers' level of concern about COVID-19 spiked in the last week



Source: Numerator survey 3/24/20—Shoppers with confirmed purchases week prior. Includes data from previous week's survey.

### All shoppers are not “panic-shopping”; instead they’re doing more planning before heading to the store



**31%**  
make a list



**28%**  
plan meals



**24%**  
look for deals  
(driven by Gen X and Millennials)



**23%**  
review circulars

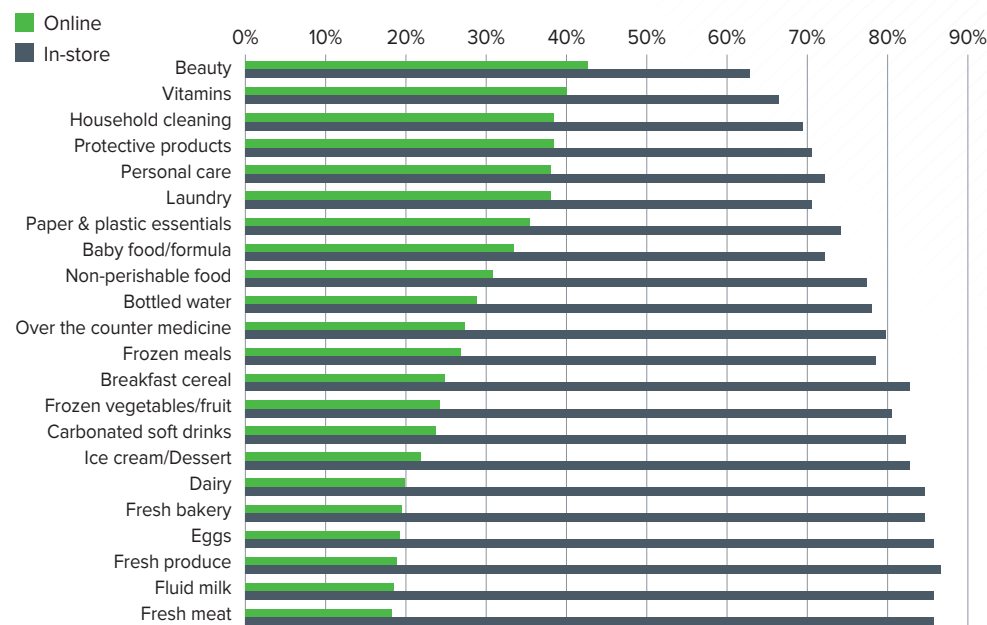


**22%**  
compare prices



**18%**  
read product reviews

### Shoppers are actively researching and planning before heading to stores



Sources: Cleveland Research Company through 3/26/20; Numerator through 3/24/20; P2PIQ through 3/20/20

Shoppers now more concerned they can't get products they want vs contracting the virus (which was their top concern)

**71%**

Shoppers concerned about the store selling out of items they need



**34%**

Shoppers concerned about self or someone else in household becoming sick, down from 64% two weeks ago



Stock-up trips have slowed in the last week, driven by traditional grocers and mass merchandisers, due to:

- Out-of-stocks
- Most consumers already stocked up
- Social distancing
- Shelter-in-place policies

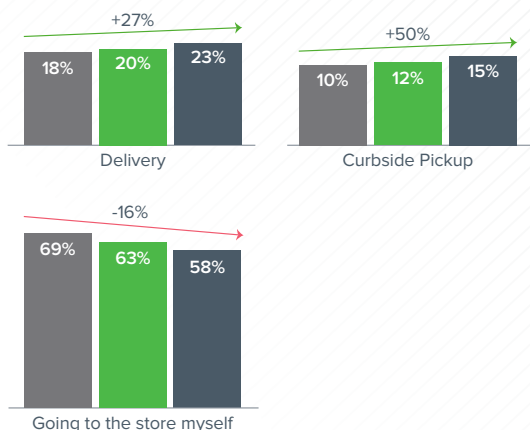
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## CPG INDUSTRY UPDATE

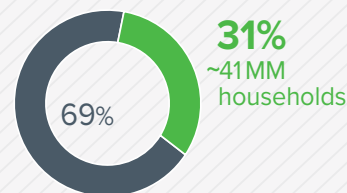


### Shoppers are turning to grocery delivery and pick-up

■ Last week ■ This week ■ Next week



% of US households that used online grocery services in the past month



- **26%** of users stated it was their first time
- **39%** of users 60+ stated it was their first time

Advantage Solutions proprietary market research offered by SMART



### What's in the pandemic-era shopping basket?

Frozen foods, soups, snacks, pasta, beverages, pantry foods, household essentials and cleaning supplies



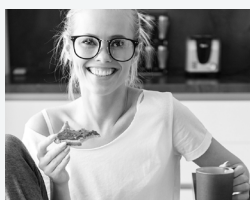
### Not in basket?

Bakery, deli, and ice cream/novelties, health & beauty products

### Understanding the impact of COVID-19 to these lifestyle segments will result in the need for new shopper marketing strategies

#### YOUNG & SINGLE

Ages 18-34, 1 person HH



Buying prepared foods more now. Brands should respond with more single-serve options.

#### GROWING FAMILIES

Ages 25-44, 3+ persons HHs



Making more foods—both from scratch and easy-to-prepare. Brands can help with recipes and meal planning ideas.

#### HISPANICS



More likely to switch brands permanently. Brands can establish loyalty by providing cooking tips, recipes and meal planning ideas.



### Consumer sentiment about cooking during COVID-19 era

**58%**

Cooking convenient and easy-to-prepare foods

**34%**

Cooking from scratch and making gourmet meals

**25%**

Can't wait to eat out again



# COVID-19

## CPG INDUSTRY UPDATE

### FROM THE FRONT LINES

Serving not only our clients and customers, but our communities

Making sure products are in stock for our community

3/21/20

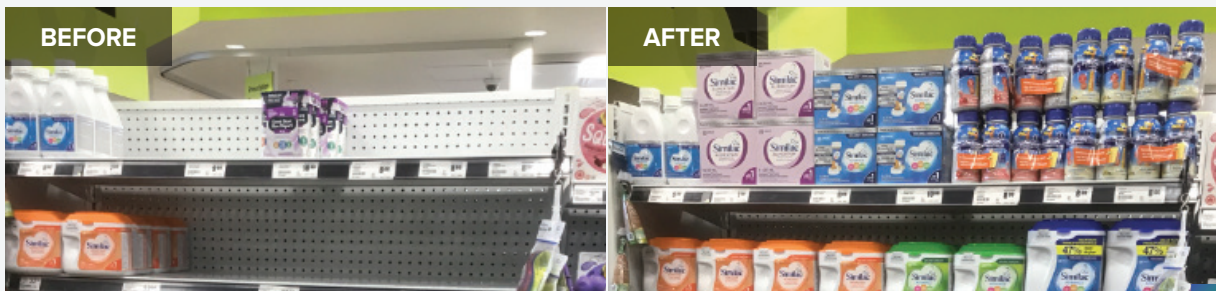


“Meijer store associates were grateful for the work done replenishing Breyers.”

- Gerald Whitney, Unilever Weekend Team



3/24/20



Lou Umbriaco packed out baby formula and Pedialyte to ensure shoppers could easily shop this critical category during a time of need.



3/23/20



Fernando Esparza was able to extend Mrs. Meyers from 3 shelves to an entire 4 ft. section at Target.

