THE IRISH GROCERY SHOPPER

MARCH 2020

COVID-19 CRISIS

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Shopper Intelligence
Understand. Influence. Lead.

March 2020 Covid-19 Crisis – Study Scope

- Shopper Intelligence is the only study that measures Irish shoppers' perceptions, behaviours and attitudes across channels on a continuous basis at a category level – allowing you to constantly track what your shoppers think, want and do retailer by retailer.

- Our regular program runs annually and in 2020 we have interviewed over 20,000 Irish shoppers.

- For this one-off study of Irish shopper perceptions, behaviours and attitudes during the Covid-19 crisis we interviewed 1,561 Irish shoppers across the Big 5 Retailers/ Discounters (Aldi, Dunnes Stores, Lidl, Super-Valu and Tesco) between the dates of March 5th and March 17th. This timeframe is identified by market data sources as a period of increased shopper spending associated with 'panic-buying' and 'stock-piling' in Ireland due to the Covid-19 crisis.

- For benchmarking purposes we compare the March 2020 shopper data to the results of our 2019 program - which represents 'regular shopping behaviour'. The data included here is a view of total store/average Irish shopper behaviour. More detailed retailer / department / category info is available also.

1. The Obvious Stuff

Large stock-ups have increased.

Top-Ups and Immediate Consumption Trips have decreased

Traditionally '*less-frequently*' purchased items have increased in frequency during this period

The 'Stock-Up' occasion has increased – but only slightly.

Shoppers continue to shop with specific meals/occasions in mind.

Average spend by category has increased (+21%)

Females remain the primary shopper.

But younger shoppers (18-34) increase (+9%) as does '*shopping for myself*' (+21%)

1. The Obvious Stuff

Large stock-ups have increased. Top-Ups and Immediate Consumption trips have decreased.

	2019	March 2020
Large Stock-Up	13%	23%
Main Shop	40%	40%
Immediate Use	13%	11%
Top-Up	32%	25%

Traditionally 'less-frequently' purchased items have increased in frequency during this period

	2019	March 2020
Every few days	12%	8%
Every week	43%	39%
Every 2-3 weeks	25%	28%
Every month	10%	13%
Every 2-3 months	6%	7%
Every 4-6 months	1%	2%

The 'Stock-Up' occasion has increased – but only slightly

	2019	March 2020
General Stock-Up	39%	41%

Shoppers continue to shop with specific meals/occasions in mind – ie Eat Now, Breakfast, Lunch, Dinner, Relax/Treat/Snack

1. The Obvious Stuff

Females remain the primary shopper.

	2019	March 2020
	34%	35%
	66%	65%

But younger shoppers (18-34) increase (+9%) as does 'shopping for myself' (+21%)

2019	2019	March 2020
18-34	30%	39%
35-54	49%	42%
55+	21%	19%

2. The Good News

Retailer satisfaction scores have increased.

Irish shoppers are satisfied and recognise the great job retailers and suppliers are doing in challenging times.

Shoppers are also more loyal to their regular retailer during the crisis (ie previous trust built up is key now).

Shoppers are particularly satisfied with:

- Range/Assortment.
- Availability and Enjoy shopping (*Navigation has declined, perhaps due to less frequently items purchased?*).
- Product metrics - Fresh, Irish, Authentic, Healthy Options and Sustainable.

Finally, across our 18 importance metrics, the one that has increased the most in terms of importance is ‘enjoy shopping’.

With many other activities removed from daily life currently, has the shopping trip become a more important event for people to enjoy?

2. The Good News

	Satisfaction	2019	March 2020
	Overall	63%	65%
	Price	64%	64%
	Product	58%	61%
	Assortment	59%	63%
	Execution	67%	69%

	Loyalty to Retailer	2019	March 2020
	Loyal	48%	51%
	Shop Around	46%	43%

2. The Good News

Areas of particular satisfaction and one area of decline

	2019	March 2020
Fresh	77%	80%
Authenticity	60%	66%
Healthy Choices	54%	60%
CSR	23%	32%
Irish	52%	55%
Range	73%	76%
Navigation	85%	82%
Availability	47%	52%
Enjoy	42%	48%

The metric that has increased the most in terms of importance according to Irish shoppers is…

Enjoy Shopping

+22% importance rating vs 2019

(average increase = +12%)

3. Shopper Behaviour

We would expect shopper behaviours like pre-planning, shopping quickly and switching to increase dramatically during a panic-buying/stock-piling period. However, at a top line view, shopper behaviour has stayed quite consistent.

It appears shoppers don't think what they are doing constitutes 'panic-buying' or 'stock-piling' – they are just getting a few extras. But when we look at some of the motivations behind their behaviour there are some insightful differences vs regular shopping.

Planned vs Unplanned Behaviour has remained the same overall.

However, planning is less likely driven by 'regular/ routine' purchases and more likely through fear of 'running out', 'requested by others' and by 'pre-store promos' like store coupons and advertising.

(ie pre-store promos are currently more effective for driving traffic vs regular times)

Brands remain important to shoppers in these times.

Shoppers over-index for being 'brand planned' and also for 'sticking to brands I know' currently vs regular shopping.

This suggests that it is not simply a case of anything will do for shoppers.

Switch vs Walk Away Behaviour has remained consistent overall.

The only significant difference is that shoppers are less likely to 'go to another store' if what they want is unavailable.

Again, this suggests no apparent panic for shoppers to throw anything into the basket.

Shoppers are less likely to Grab&Go (*ie shop quickly*) now vs regular shopping.

Shoppers are less likely to 'know what I want' going into the store (linked to less routine/regular purchases?).

As such they are spending more time 'Browsing' in-store vs regular shopping.

Increased Spend is being driven by specific areas…

Shoppers are spending more on 'new/different' and buying extra 'because I feel like it' (treating themselves?)

They over-index for shopping off 'Aisle Ends' and shoppers feel that the more they buy, the more they will consume (expandability).

However, shoppers are less likely to trade up to 'premium' and are more open to Private Label.

3. Shopper Behaviour

2019	*Planned or Unplanned*	Mar 2020
72%	**Planned**	72%
28%	**Unplanned**	28%

What drives Traffic/Planning?	2019	Mar 2020
Regular purchase	53%	50%
Requested	14%	16%
Don’t want to run out	28%	39%
Pre-store promotions	16%	20%

Brands are still important to shoppers

	2019	Mar 2020
I planned to buy a particular brand	24%	25%
I planned to buy one of a number of suitable brands	7%	8%
Usually stick to the brands/types I know and am familiar with	60%	62%

2019	*If I couldn’t find what I wanted, I would…*	Mar 2020
53%	**Switch**	53%
47%	**Walk Away**	47%
13%	**Gone to another store**	11%

3. Shopper Behaviour

	2019	Mar 2020
Grab & Go	76%	72%
Knew what I wanted	55%	49%
Time pressure	9%	11%
Spend time on other things	5%	6%
Browse	17%	20%

Spend Drivers

		2019	Mar 2020
Boost	Try new and different	41%	46%
	Buy because I feel like it	29%	33%
	Expandable	26%	30%
Display	**Total Main Aisle**	56%	53%
	Total Secondary Aisle	41%	43%
	End of Aisle Display	8%	11%

But also some barriers to spending more…

		2019	Mar 2020
Barriers	Open to Private Label	44%	49%
	Trade up to Premium	47%	45%

3 Key Conclusions

1

Topline shopper behaviour hasn't changed in the Covid-19 period…but motivations/drivers behind that behaviour have.

Shoppers don't see their behaviour as panic-buying or stock-piling. They are just buying a few extra items vs normal.

2

Overall, Irish shoppers are very satisfied with how retailers and suppliers are responding to these challenging times.

Shoppers are also more loyal to their regular retailer during the crisis – going with the tried and trusted.

3

During this crisis, with many activities removed from daily life for Irish people, has the shopping trip become a more important event?

And even one that they want to enjoy?

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