Consumer behavior shifts: A month after stay-at-home ordered in most states, consumers settle down with a new consistent shopping behavior - focused on food. Grocery makes a comeback as one of the top 5 growth departments replacing Household Care. Trips to store decline but continue to grow online. COVID softened demand of Easter categories, chocolates and confections, resulting in 5-7% less dollars than expected during Easter.

CONSUMER TRENDS
U.S. shoppers maintain increased consumption while staying & eating at home

CENTER STORE
Beverages and snacks expand both on and off line

E-COMMERCE
Increase in click & collect trip traction

EASTER
COVID tamps down Easter demand

E-COMMERCE
Omnichannel retailers continue to capture ecommerce share at the expense of pure play (up 8 share points)

BRICK AND MORTAR
Trips begin to contract and baskets expand to account for it.

MULTICULTURAL
African American HHs gravitate to large store formats & Hispanic HHs shift to limited assortment, smaller footprint stores.

COVID EASTER IMPACT
COVID impact on Easter categories
Online sales gains did not compensate for B&M loss

Easter week 2020 vs. 2019

BRICK & MORTAR
ONLINE
DIFF
IMPACT

CHOCOLATE

-46M
+$24M
-22M
-5%

CONFECTION

-28M
+$12M
-16M
-7%

E-COMMERCE
Online growth since start
Click & Collect
UP 88%
20% of online sales
Home delivery
UP 53%

TOYmarkt
China

OMNICHANNEL
African American HHs gravitate to large store formats & Hispanic HHs shift to limited assortment, smaller footprint stores.

% OF DOLLARS - INDEX VS 2019

MASS

WAREHOUSE

DRUG

DOLLAR

AA

Hispanic

Data Source: Nielsen Homescan, 4 w/e 4/11/20 vs 2019