How Americans Are Shopping During COVID-19
Data through time period week ending 4/18

DEFINING PANTRY WITH AT-HOME ORDERS

Consumer behavior shifts: As cooking and eating at home becomes increasingly entrenched, food and cleaning supplies demand grows while other center store departments slow down. Meat and Frozen remain high, up 40%+ after adjusting for late Easter in 2019.

Both online and offline baskets continue to expand. Trips consolidate further, driven by younger HHs.

U.S. shoppers in-home food and beverage consumption continues to rise while demand of non-food categories (excl. cleaning supplies) dampen.

E-COMMERCE
Basket values show highest growth since start

DEMOGRAPHICS
Millenial and younger HHs less likely to make even a single trip to stores in recent weeks

CATEGORY IMPACTS

ACCELERATED GROWTH
B&M | eCom

CHG IN
RANKED IMPACT
AROC % CHG

GROWTH
DRIVERS

MEAT
26% | NA

BACON, DINNER SAUSAGE, BEEF

FROZEN
24% | NA

SANDWICHES, HANDHELD ENTREES, MIXED VEGETABLES

ALCOHOL
21% | 415%

WINE, CIDER, PREPARED COCKTAILS

HOUSEHOLD CARE
20% | 58%

DISINFECTANTS SPRAYS, MULTIPURPOSE CLEANERS

DAIRY
15% | 81%

CHEESE, EGGS, COWS MILK

E-COMMERCE

59%

ONLINE GROWTH SINCE START

CLICK & COLLECT
UP 88% 20% of Online sales

HOME DELIVERY
UP 53%

46%

INCREASE IN BUYERS

1%

FEWER TRIPS

8%

HIGHER BASKET VALUES

CATEGORY SLOWDOWN
E-com growth not enough to stem the decline in certain categories.

BRICK AND MORTAR

Trips to the store decline notably in the latest week.

TOTAL OUTLETS - % CHANGE VS 2019 AVG

AGE DIFFERENCES
Younger heads of household less likely to make a B&M trip in recent weeks.

EASTER ADJUSTMENT
Higher growth in Meat, Frozen, and Dairy after adjusting for a later Easter week in 2019.

B&M - eCom

MEAT
+F17

FROZEN
+F20

DAIRY
+F17

Week of 4/18/20
Week of 4/11/20
Week of 4/4/20
Week of 3/28/20

Data Source: Nielsen Homescan

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