

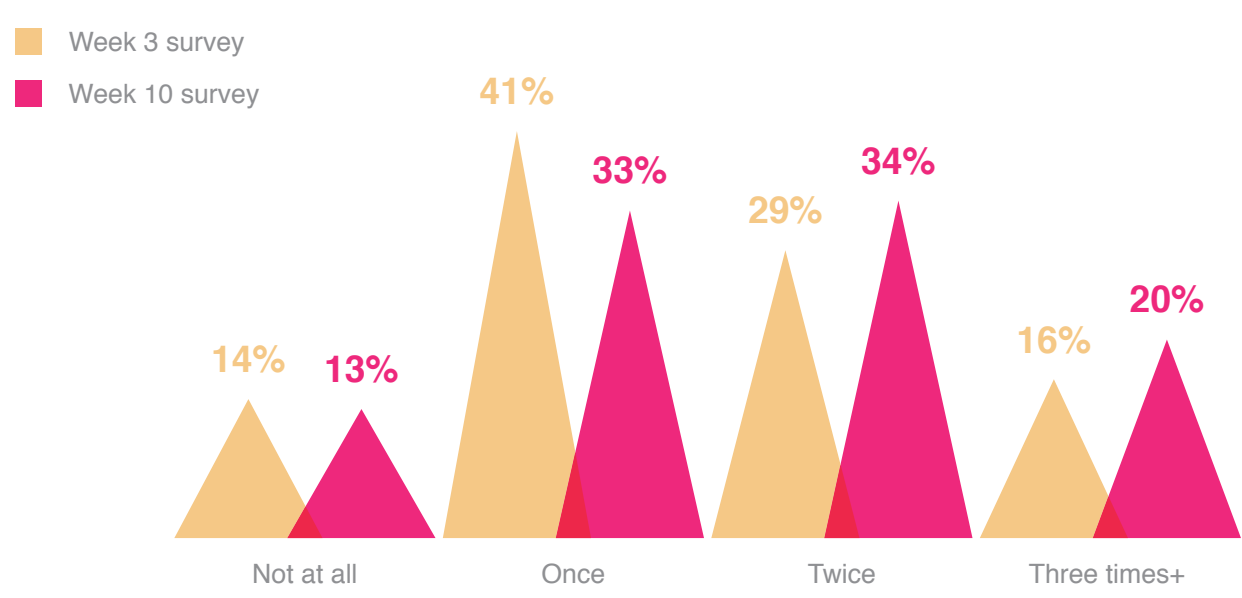
UK SHOPPER SURVEY RESULTS

These are the results of the second UK Shopmium user survey conducted since the start of enforced 'social distancing' measures. The survey was conducted on 21st - 25th May 2020 (week 10 of UK lockdown) and the results draw comparisons with those from the first survey (9th - 14th April 2020, week 3 of UK lockdown).

GROCERY SHOPPING TRIP FREQUENCY IS INCREASING

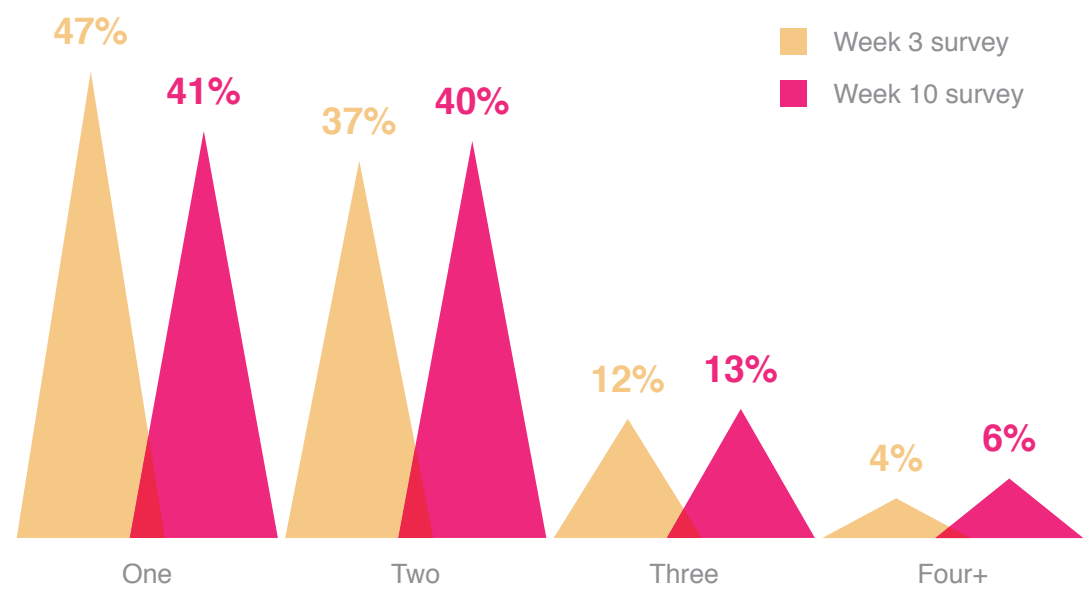
9% Increase in shoppers making **two or more** grocery shopping trips per week.

As a household, within the last 7 days, how many times have you visited a grocery store?



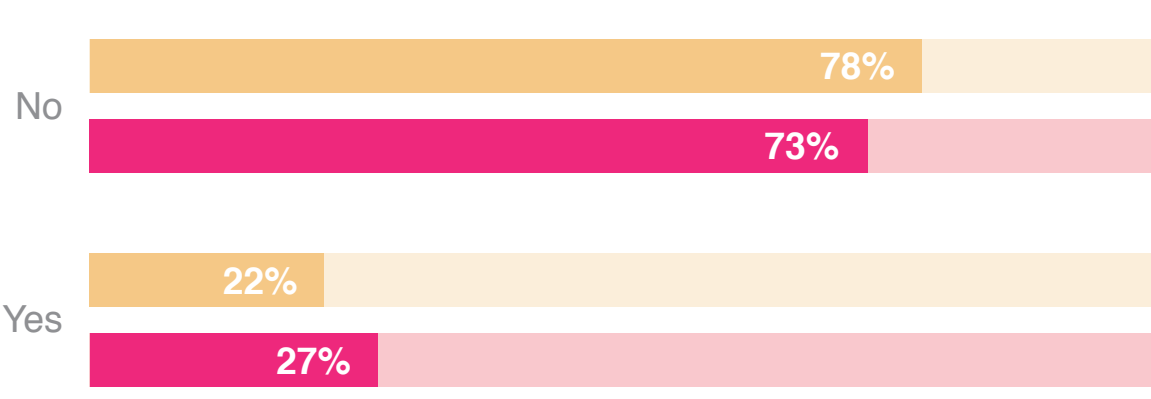
6% Increase in shoppers visiting **two or more different** grocery stores each week.

How many different grocery stores have you visited within the last week?

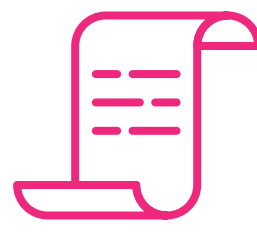


73% Of shoppers are shopping in-store only.

In the last 7 days have you bought groceries online (delivery or click & collect)?



The average weekly household grocery spend of a **Shopmium user** is higher than the ONS data per household.



£92.31

Shopmium user



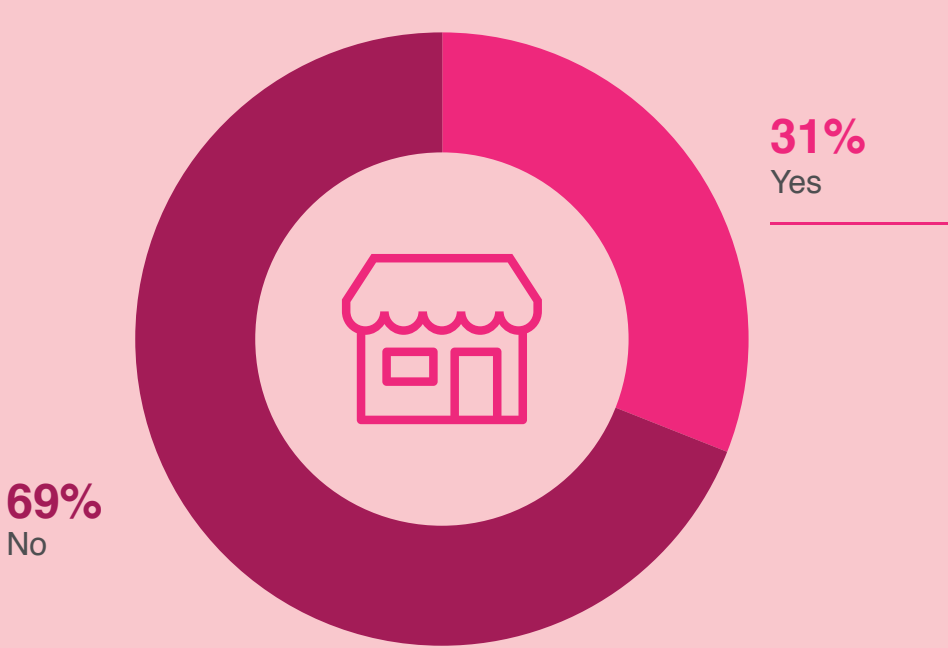
£62.00

Office for National Statistics (ONS)

SHOPPERS ARE SWITCHING STORES IN LOCKDOWN

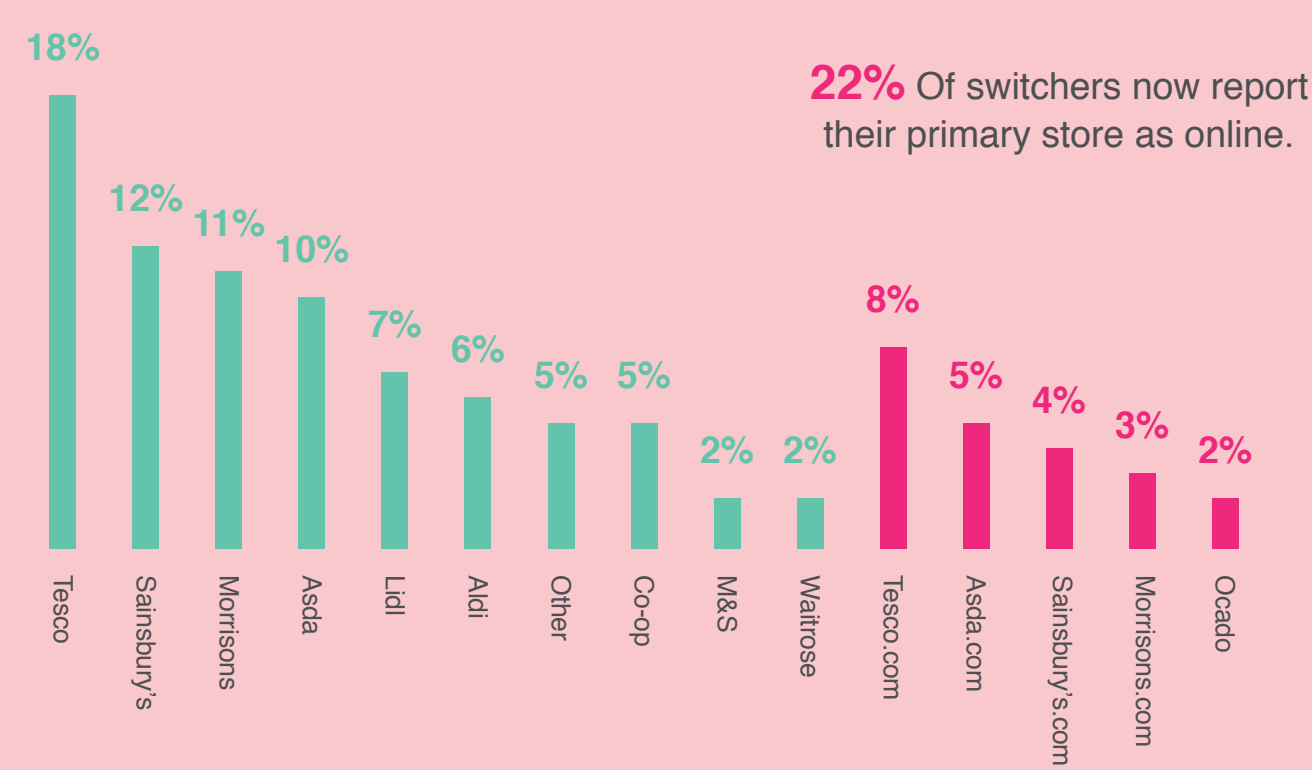
31% Have **switched** their primary grocery store

Since social distancing started in March, have you changed the primary store that you shop at from your primary store pre-lockdown?



Growth in online channel amongst switchers

What is your new primary store?

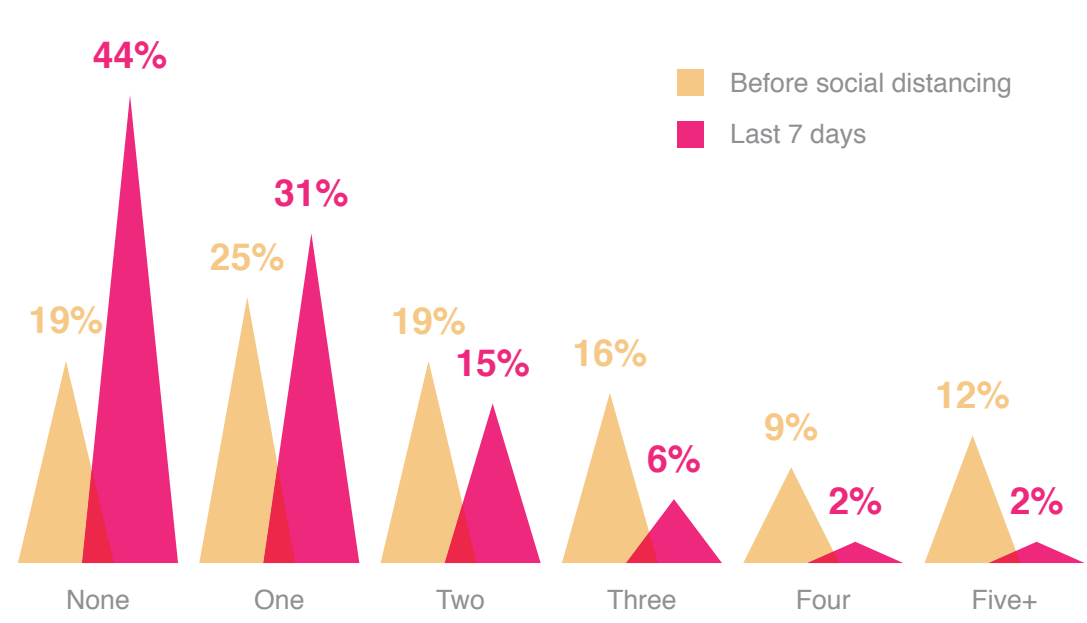


22% Of switchers now report their primary store as online.

CONVENIENCE SHOPPING HABITS HAVE SHIFTED

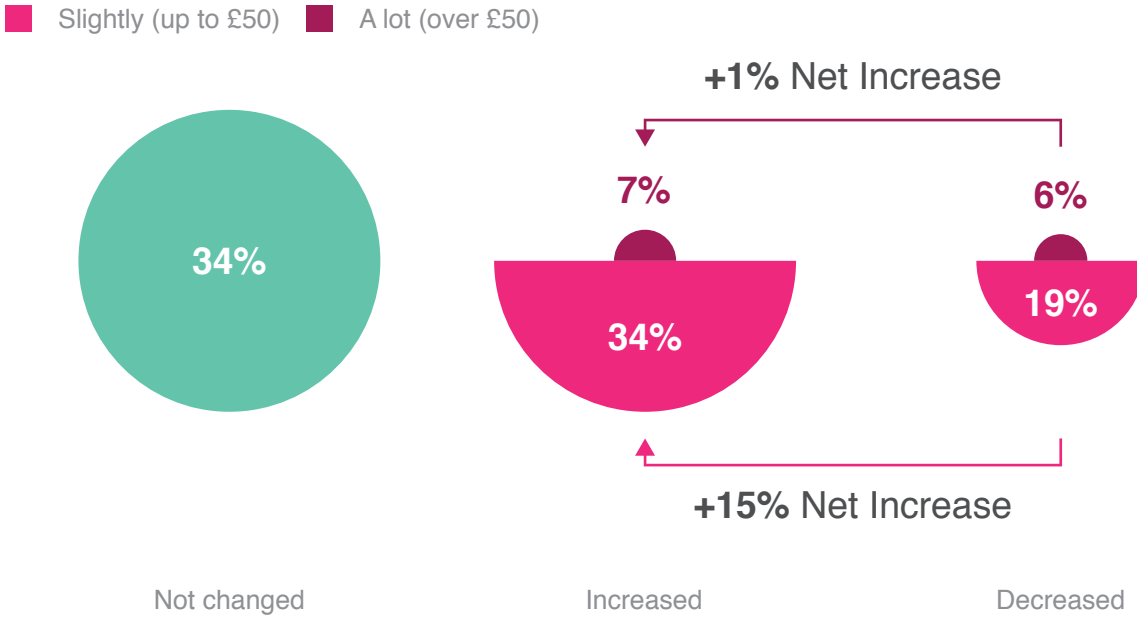
31% Decrease in **two or more** visits to convenience stores since before lockdown

As a household in the last 7 days, how many times have you visited a convenience store vs. before social distancing measures were introduced?



There has been a net **16%** increase in shoppers spending more per week in convenience stores.

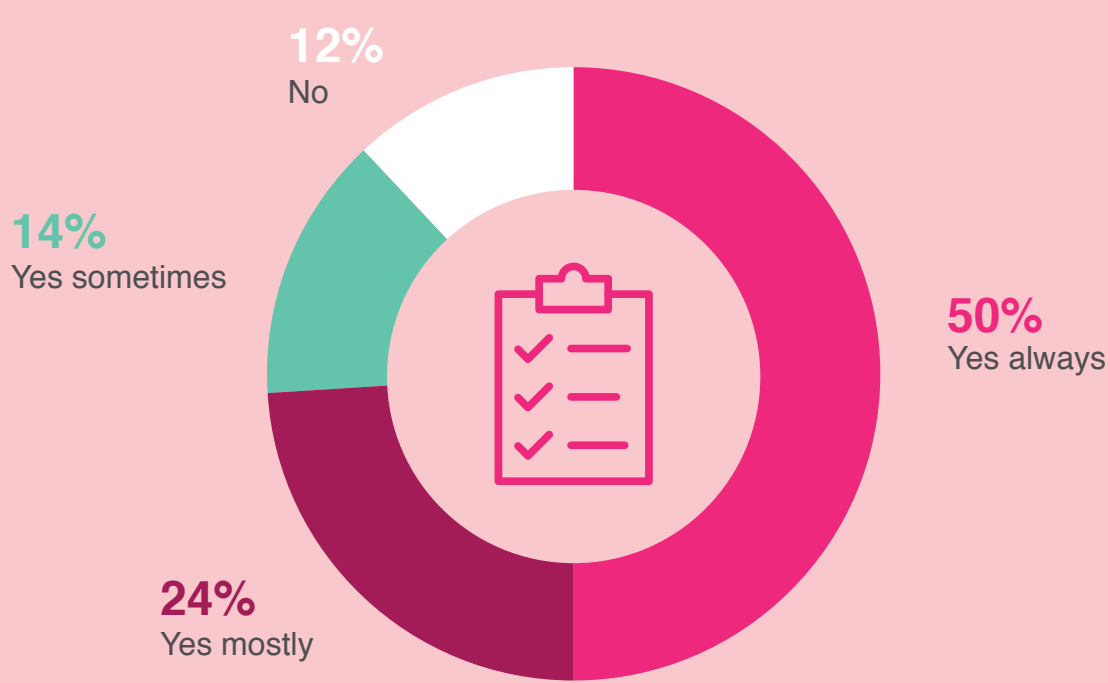
How much has your spend on groceries in convenience format stores changed since lockdown measures were introduced this year?



SHOPPERS ARE PRE-PLANNING AT HOME

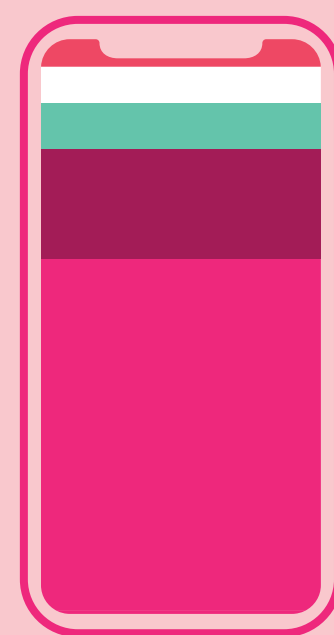
88% Of shoppers are now using a shopping list

Since social distancing measures were introduced, have you been using a shopping list when you visit a store?



Pre-shop planning using the **Shopmium App**, mainly at home

Where do you browse the Shopmium app and decide on relevant brands? (Select all that apply)

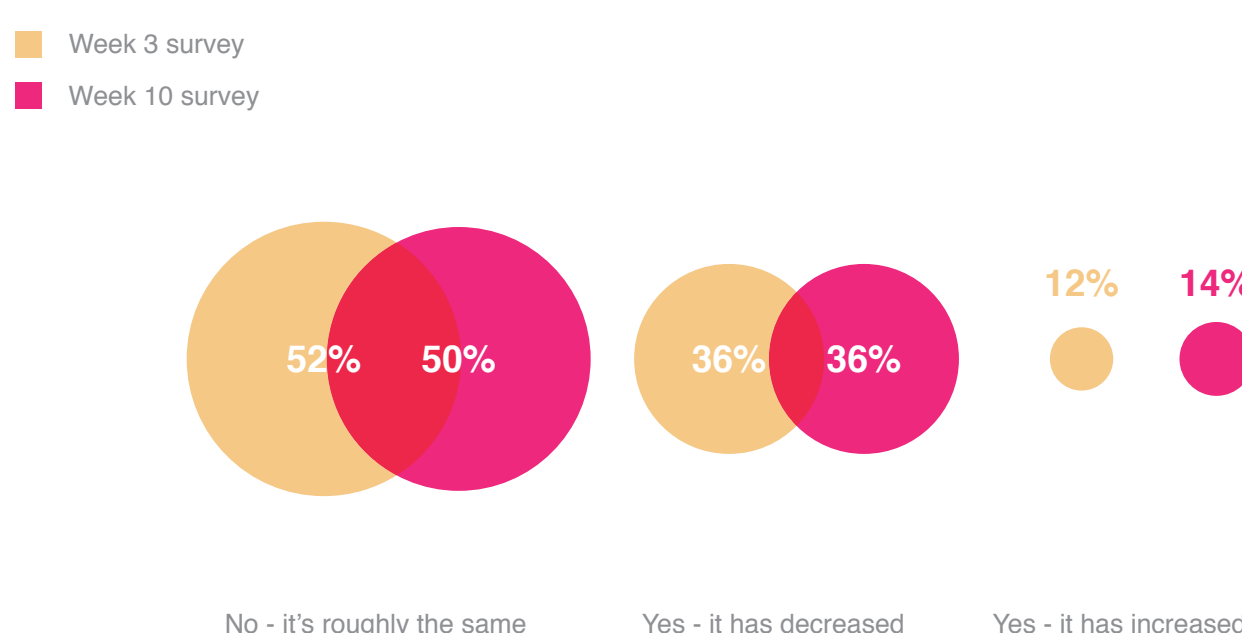


- 6% While doing online shop
- 8% On the way to the store
- 10% Queuing outside store
- 24% While in-store
- 77% At home before shopping

SHOPPERS ARE ADAPTING TO LIFE AT HOME

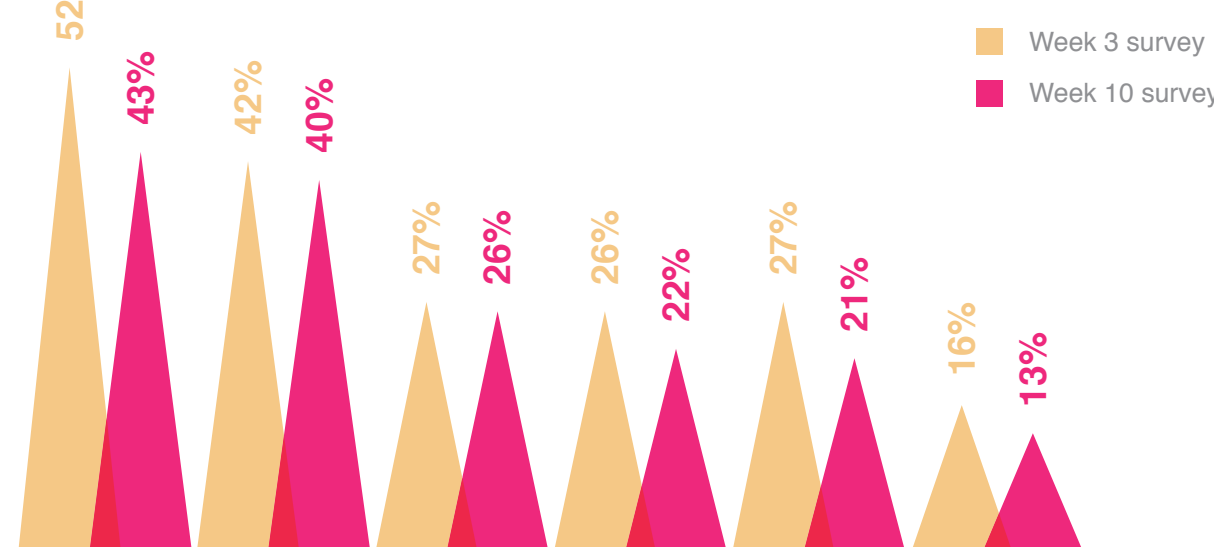
Since Pre-Covid **36%** have **less** disposable income

Has your disposable income changed since the start of "Social Distancing" measures?



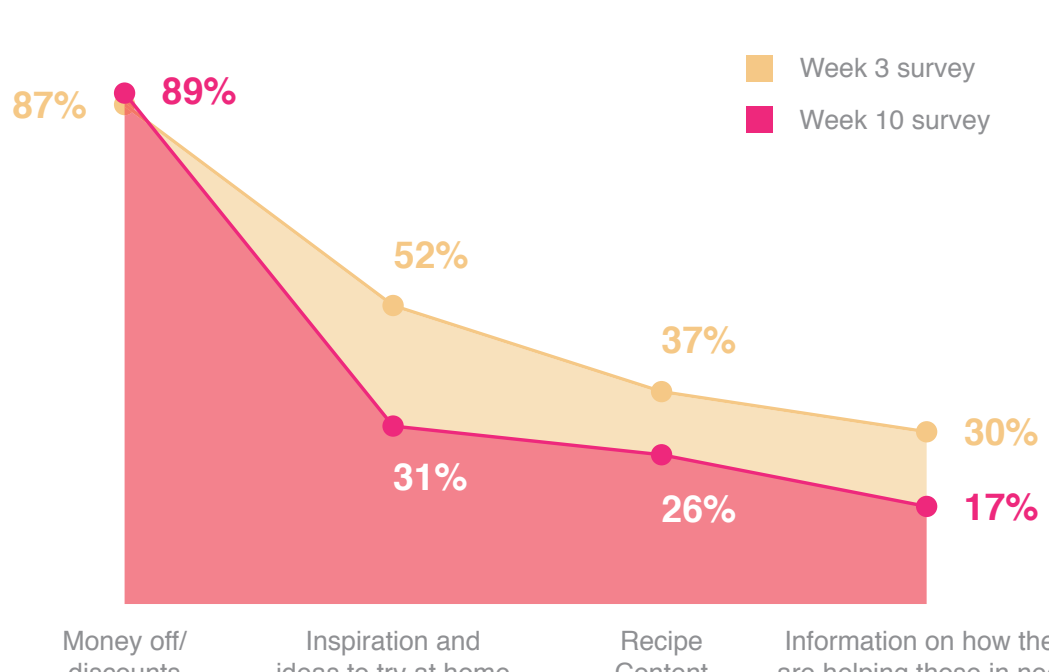
'Keeping healthy' and 'Inspiration for things to do' remain **most wanted**

Which of these do you currently find most challenging at home? (Select all that apply)



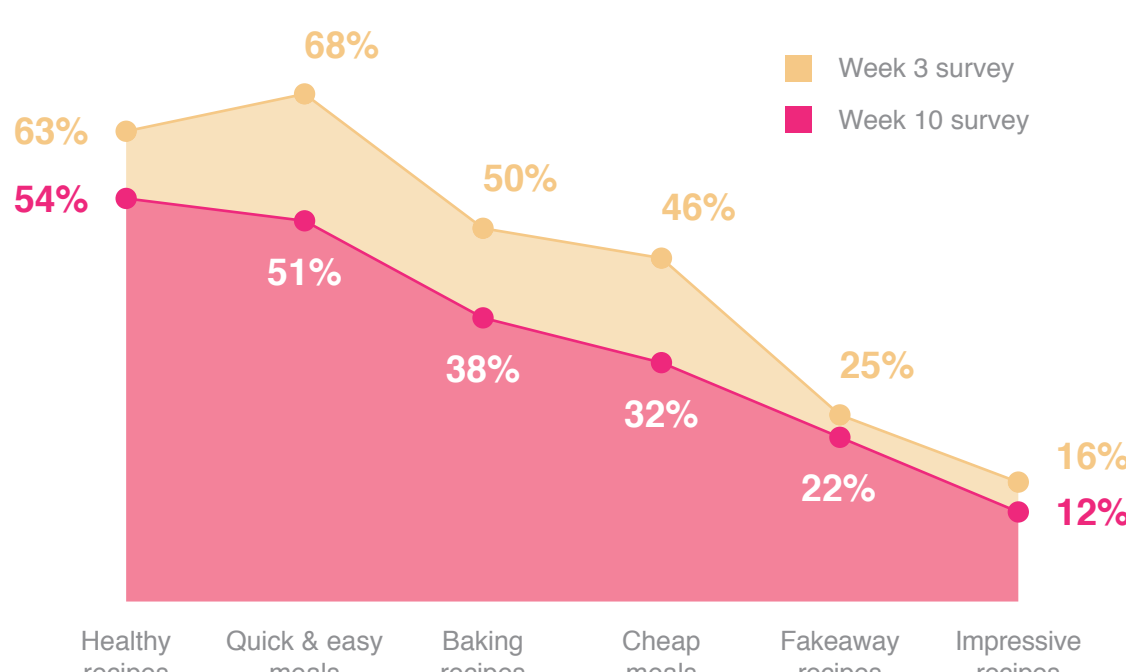
Money-off promotions remain **highest** up the wish list

What kind of content would you like see from grocery brands? (Select all that apply)



Healthy recipes **top the pile** with over half of shoppers requesting them

What recipe content are you most interested in? (Select all that apply)



NEW HABITS ARE HERE TO STAY

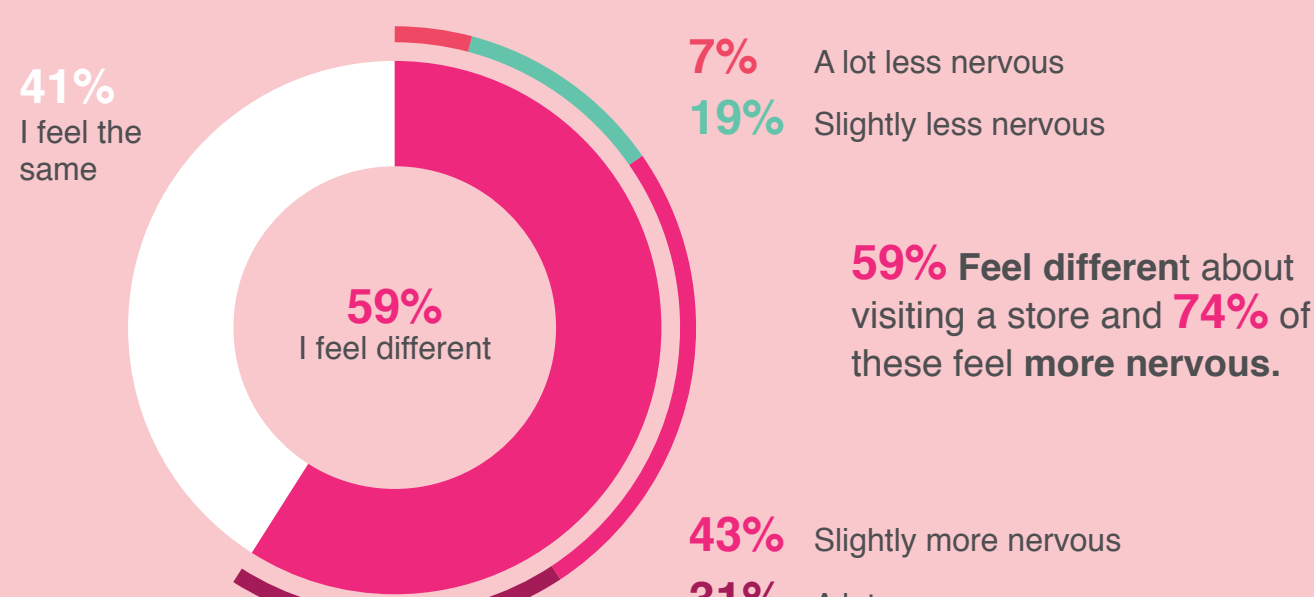
Half of all shoppers are planning to stick with their new shopping habits, with **37%** anticipating only small changes

Do you anticipate any immediate changes in your shopping habits over the coming weeks?



Feelings have changed around visiting a store

How do you feel about visiting a supermarket compared to when "lockdown" was first enforced?



SUMMARY

Grocery shopping trips are increasing with bricks & mortar stores still declining. Online growth is amongst primary store switchers. Convenience store visits are in decline but spend per visit is increasing. Shoppers are becoming more organised with shopping lists and are becoming more price sensitive across different categories. At home, disposable income has been impacted but shoppers look to be adapting to the new home life, with health being a primary focus. Money off promotions are most wanted from brands. These new shopping habits are here to stay as people adjust to the new normal.