

# Anatomy of Change

Understanding Consumer Behavior When Grocery Shopping in the New Next 2020



## EMEA Spotlight

Unlike any other year in recent history, 2020 has seen consumer behavior, and by extension, the retail market, significantly disrupted. Grocery stores, deemed “essential businesses” and not subject to long-term closure, have nonetheless felt the significant effects of shifting consumer behaviors, perceptions, and expectations on retailers. **This regional spotlight shines a global lens at how countries in EMEA fare compared to the US and China.**



## How People Grocery Shop During the Pandemic

As the global pandemic shut down communities, consumers began shopping differently — even with “essential” businesses like grocery stores, which remained open to the public for in-person shopping. Despite being able to shop in-store, 61% of global consumers reported making grocery purchases online during the pandemic, but in EMEA, only 30% of consumers in Germany compared to 81% in UAE.

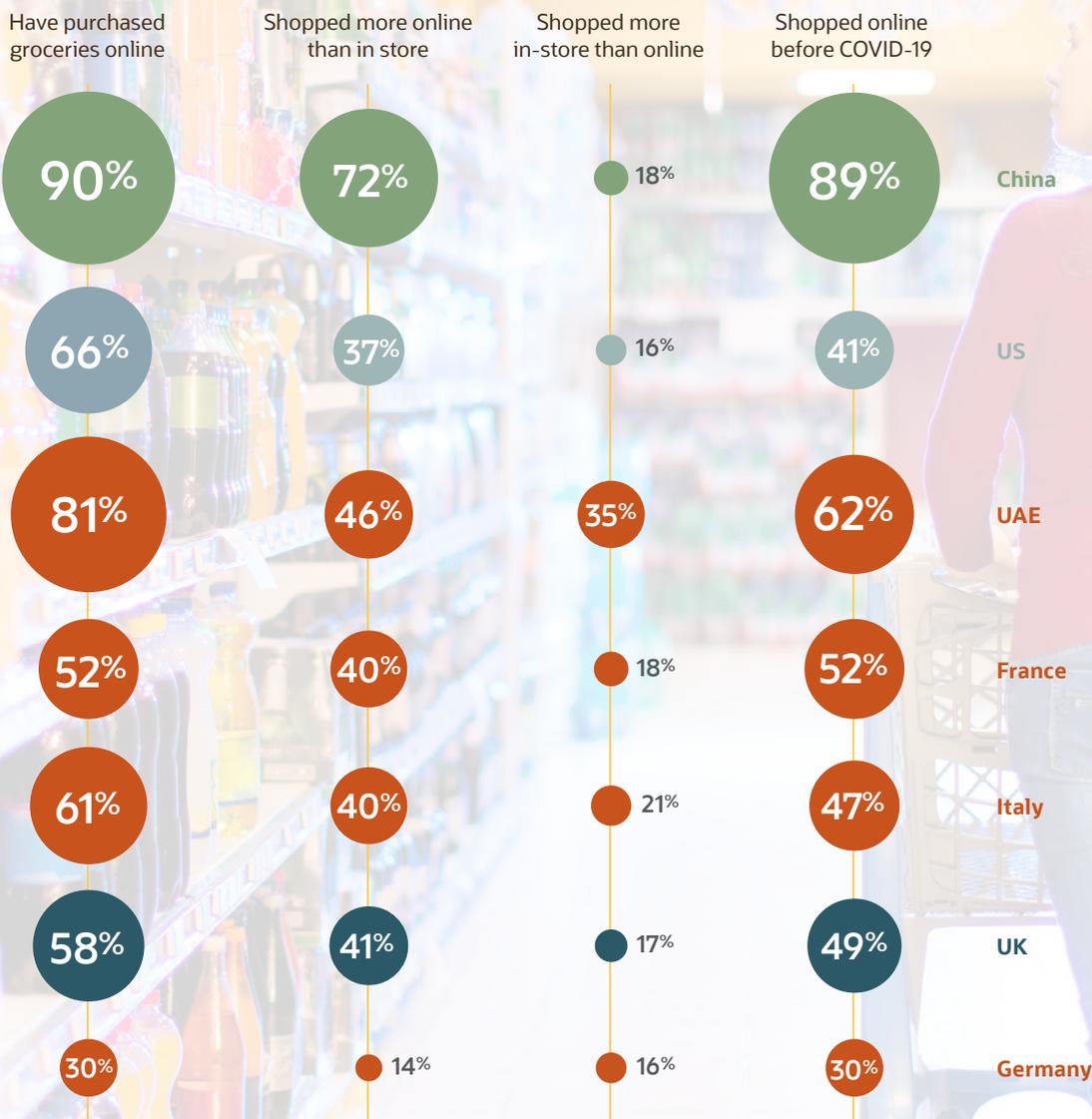
# 92%

of consumers surveyed will continue online grocery shopping moving forward

In the months since COVID-19 lockdowns began to change behavior, consumers have formed new habits. In fact, 92% of consumers surveyed will continue online grocery shopping moving forward, with 7 in 10 consumers anticipating they will shop online as much as or more frequently than they have during the pandemic.

Overwhelmingly, consumers who bought groceries online had them delivered, with nearly 3 in 4 consumers opting for home delivery. However only 34% in France preferred home delivery vs. 85% of consumers in the UK.

## How people shop during the pandemic:



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## Maintaining the Grocery Experience

Beyond responsible public health measures to drive grocery decision-making, consumers also base shopping decisions on a factor that hasn't been changed by the pandemic: shopping rewards. Nearly 30% of global consumers say they would always choose a grocery retailer where loyalty points or discounts on purchases are available, versus other options.

Nearly 9 in 10 consumers (88%) say that they would sometimes, frequently, or always choose grocery retailers where these types of rewards are available, with just 11% saying that rewards and discounts rarely or never affect their choice of the grocery retailer.



Consumers that would sometimes, frequently, or always choose grocery retailers where rewards are available

## Private Label Brand Discovery During the Pandemic

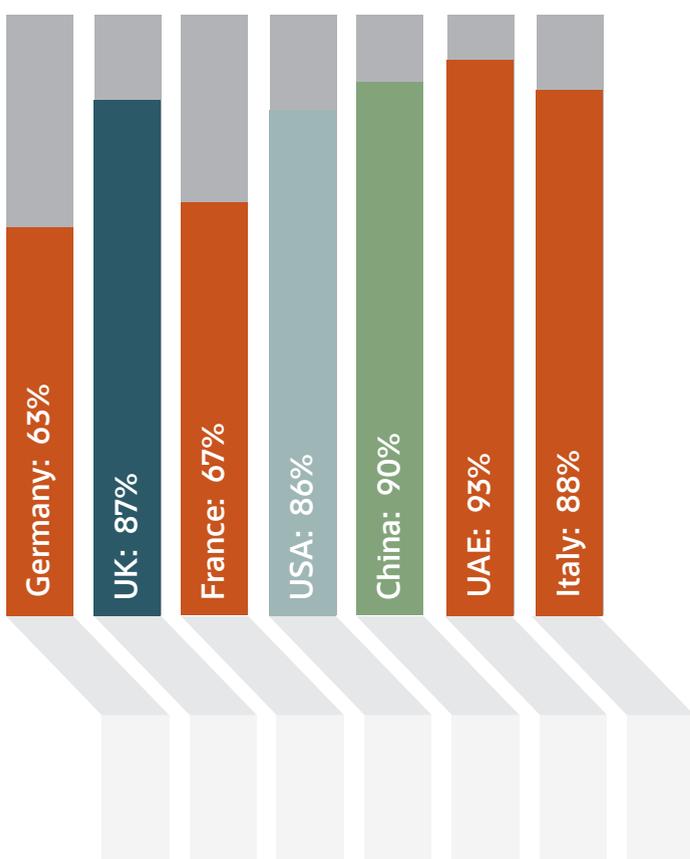
Of consumers that explored new [private label](#) brands in-store, more than half (61%) plan to stick with the new brands or include them in a mix of new finds and old favorites as they shop in the future. And of those that purchased products at new grocery stores, 53% plan to continue shopping at the new locations in addition to their prior preferred stores.

Consumers in UAE (93%) and China (90%) were the most adventurous in trying new private brands, while Germany (63%) and France (67%) were less reluctant to explore them.

Many consumers unable to find what they needed in the store turned to online storefronts and new brands to meet their grocery needs. In fact, nearly half of consumers (45%) discovered new brands online and will continue to shop for those brands moving forward, with 16% anticipating choosing the new brands over their former preferred brand.

## With grocery shortages during COVID, did you explore store own brands/private labels?

### Breakdown by Country



The face of grocery shopping, as we know it, has been forever changed by the COVID-19 pandemic. Agility and adaptability are critical to the health of grocery businesses. Consumers have new expectations of retailers that go beyond the availability of products and the usual quality of in-store and online experiences. As we enter a new year, grocery retailers will be challenged to maintain the quality and consistency of shopping experiences, no matter where they occur.

Source: [Anatomy of Change: Understanding Consumer Behavior When Grocery Shopping in the New Next 2020](#). 5,143 consumers, 10 countries. The survey was conducted by independent consultancy, [Untold Insights](#)



Access the full report, [Anatomy of Change: Understanding Consumer Behavior When Grocery Shopping in the New Next 2020](#), for an in-depth analysis.