



Shopper Journey Survey Results

Feeding the world through fresh produce and
complex supply chain solutions.

November 2021



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Survey Data Parameters

- 🍏 Consumers that have purchased Fresh Produce during the last 6 months
- 🍏 Geographically and Demographically representative of the Total US
- 🍏 Launched September 28, 2021
- 🍏 Total Respondents: 2,010

Key Takeaways

- 🍏 The Pandemic has had a big impact on how consumers are eating and shopping, with most of the changes tied to how much time consumers are spending at home.
- 🍏 More affluent consumers have been able to purchase more Fresh Produce since the start of the Pandemic, while many lower income households have cut back on Fresh Produce.
- 🍏 An increase in Packaged Produce is tied to those have also shown an increase in online shopping.
- 🍏 Meal Kits and Prepared Meals are gaining in frequency of usage among regular users. Those that purchased only sporadically before the pandemic, have dropped off usage.
- 🍏 When purchasing a new Fresh Produce Item, Information and Education is key.
- 🍏 Consumers are interested in Retailer Partnerships with Online Recipe Sites or Local Restaurants.

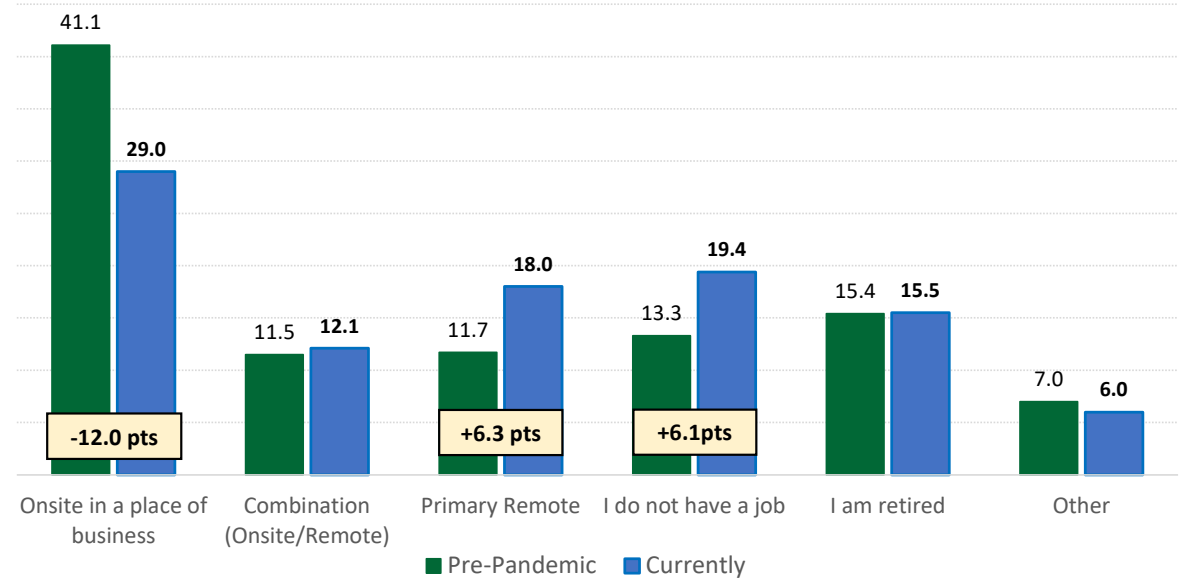
The work environment has shifted significantly during the Pandemic



Which work environment best describes you?

- Remote work has increased over 54%, while onsite has declined 29%.
- In addition, unemployment among respondents has risen significantly, up 45% since the beginning of the pandemic.
- The largest gain in 'I do not have a job' was found among 25-34 year olds; showing a 2.8 pt gain and accounting for 26.8% of respondents.

Shifts in Work Environment

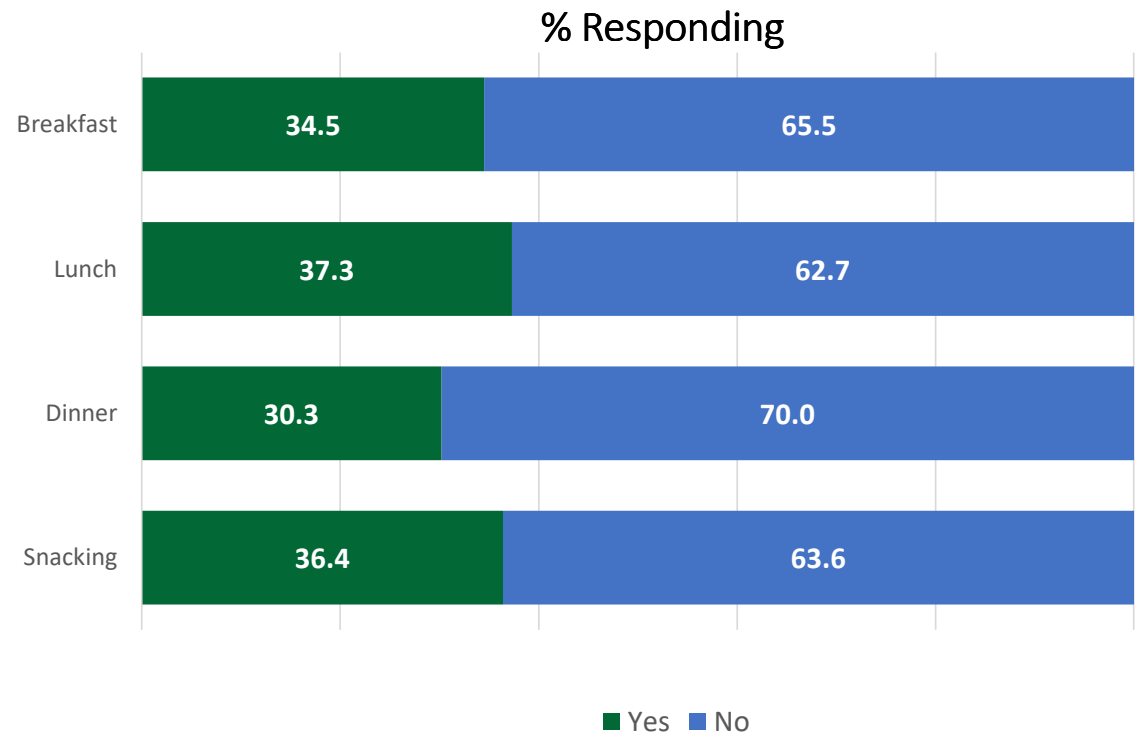


The work environment had an effect across all Meal Occasions



Has your current work environment changed the way you eat the following meals?

- With shifting work environments, roughly one-third of respondents have noted changes across all meal occasions.
- Lunch and Snacking were the occasions with the largest reported change.

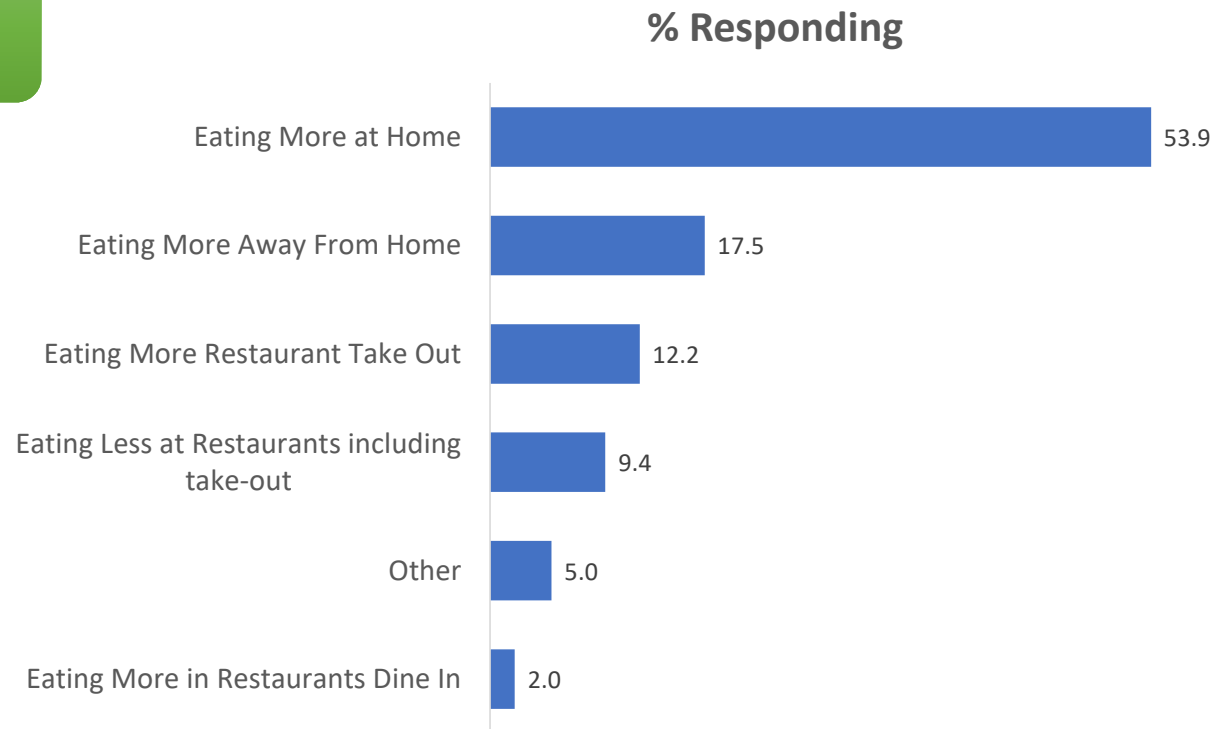


Meal Changes are tied to shifts in Eating from Home



What is the Primary Reason driving a change in how you eat your meals?

- Over half of respondents are eating more frequently at home.
- Nearly 20% of Respondents are eating more frequently away from home, and over 12% are eating more take out than Pre-Pandemic.



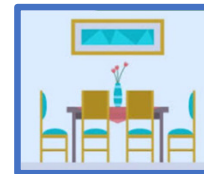
Surprisingly, restaurant lunch habits haven't changed drastically.
Breakfast and Dinner have been the most impacted.



What Meal of the day do you most frequently eat at a restaurant?

Meal Occasion	Pre-Pandemic	Currently
Breakfast	15.7%	12.2%
Lunch	23.5%	24.2%
Dinner	32.1%	36.4%
Quick Snack	14.8%	16.2%
Happy Hour	13.8%	11.0%

% of Respondents



For which meal of the day do you most frequently order take-out?

Meal Occasion	Pre-Pandemic	Currently
Breakfast	16.7%	11.2%
Lunch	27.9%	28.4%
Dinner	40.1%	45.3%
Quick Snack	15.3%	15.1%

% of Respondents

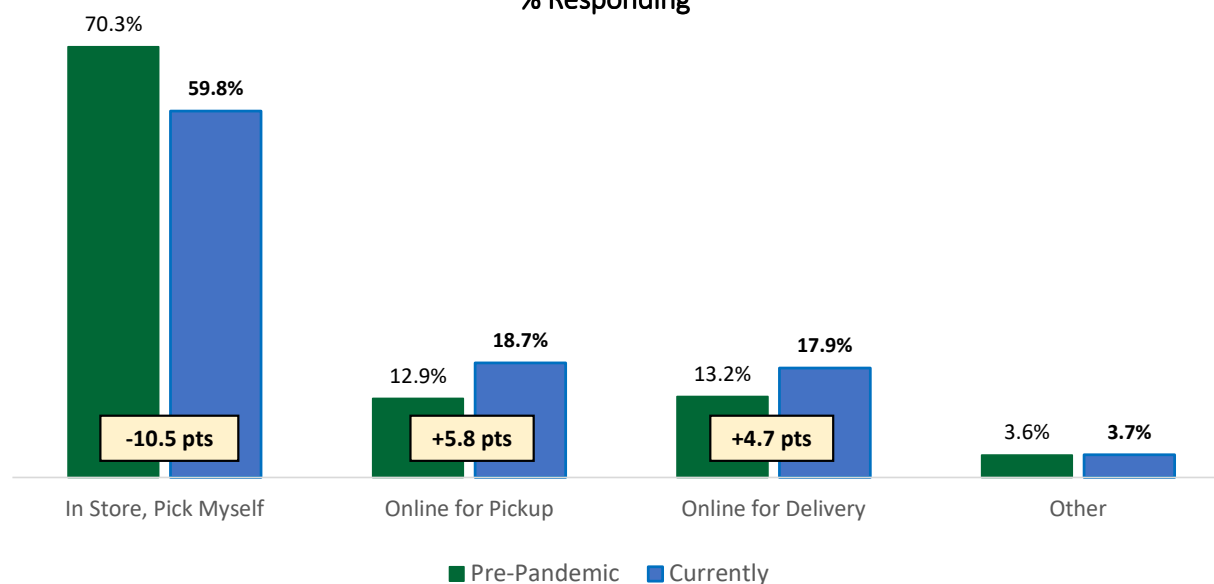
Produce Purchasing has evolved with the convenience and improvements in Online Shopping



What is your preferred method for purchasing Fresh Produce?

- Shopping in store and picking out Produce yourself continues to be the choice of the majority of shoppers, even with a 10 pt drop during the pandemic.
- Both Online for Pickup and Online for delivery gained roughly 5 pts of share from in store shopping during the pandemic.
- Growth in both Online for Pick-up and Online for Delivery came from respondents aged 25 to 54.

Channel Shifting
% Responding



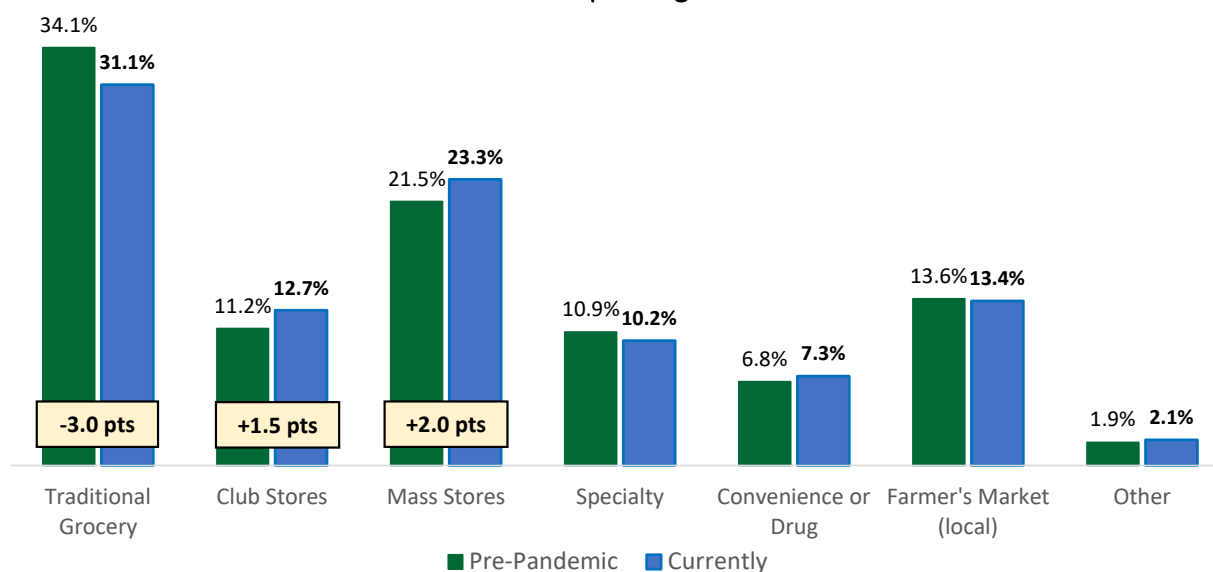
Shoppers have shifted more purchasing to Club and Mass Retailers



What is your preferred channel for purchasing Fresh Produce?

- Mass Retailers had the advantage of being a 'one-stop' shop during the pandemic, driving an increase in Produce purchasing as shoppers cut back on overall retail trips.
- Club stores also had the advantage of shoppers hoping to stock-up on hard-to-find essentials.
- Farmer's Markets have stayed consistent as the third most preferred Fresh Produce channel. By Region, there was growth in Farmer's Markets in the Northeast and Midwest, while the South and West showed declines.

Channel Shifting
% Responding

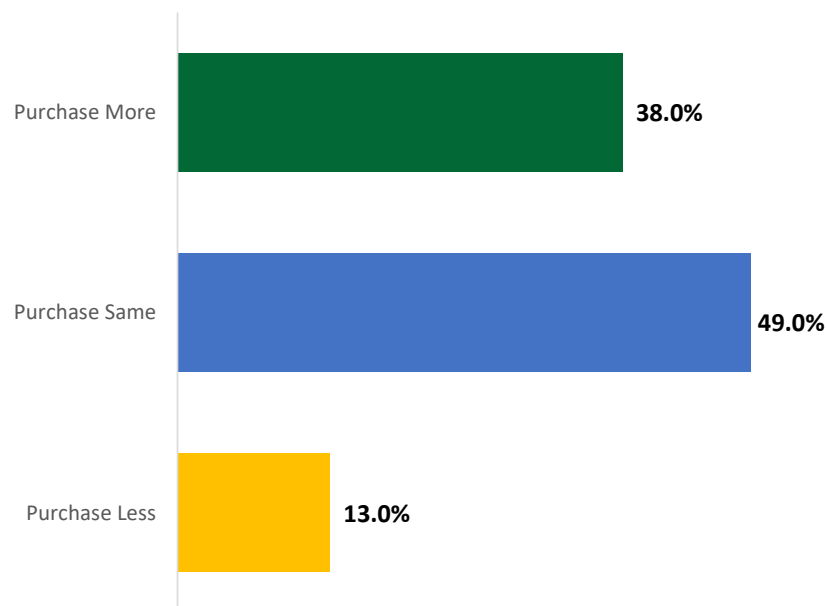


PRODUCE SHOPPER JOURNEY

Fresh Produce purchasing has been positively impacted by the pandemic, with more people purchasing Packaged Produce



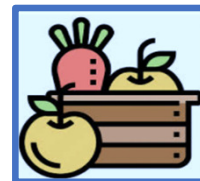
How has the quantity of Fresh Produce you purchase changed since the start of the Pandemic?



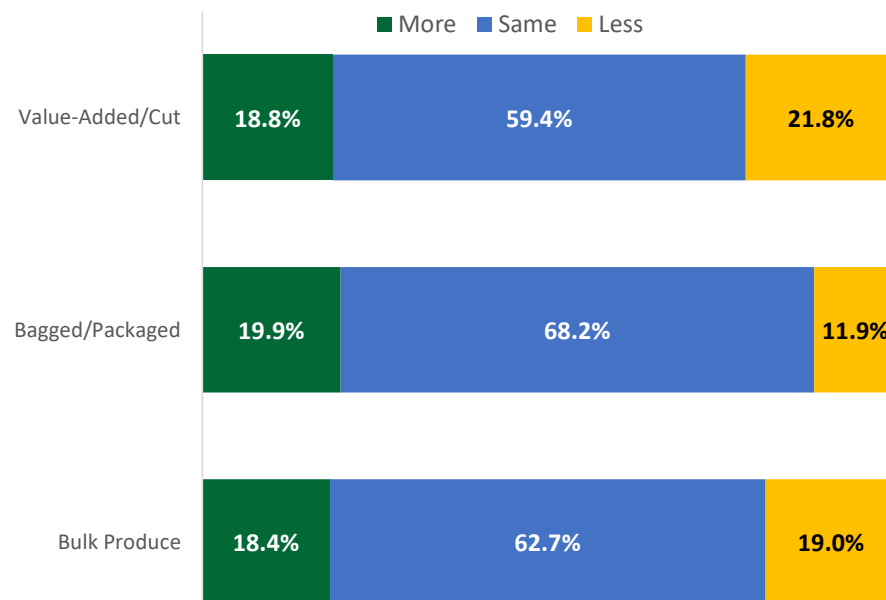
% of Respondents

Q 4.8

Q 4.9



Since the start of the Pandemic, do you purchase less, more, or the same of the following items?



% of Respondents

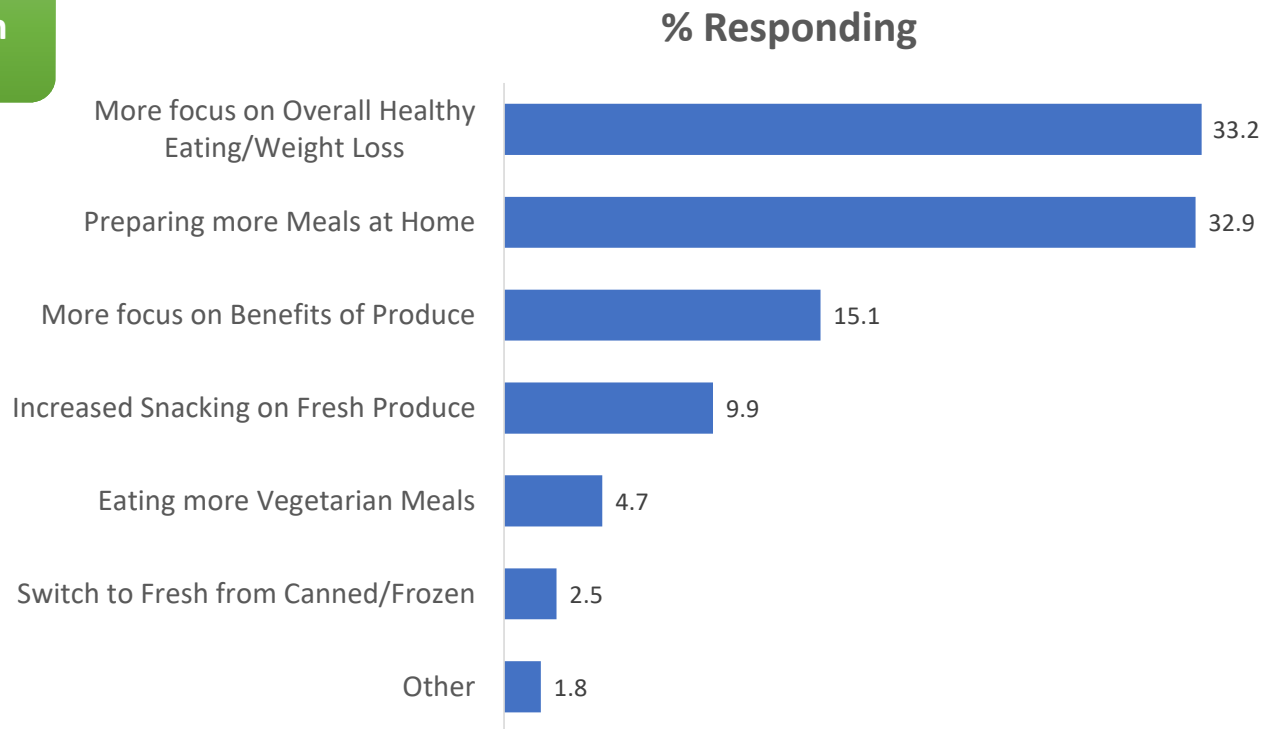


Those buying more Fresh Produce are equally focused on Healthy Living and preparing more meals at Home.



What is the Primary reason you are now purchasing more Fresh Produce?

- One-third of respondents are focusing on healthy living by eating more Fresh Produce.
- In addition, over 15% of respondents are focused on the Benefits of Produce like Digestive Health and Immunity Boosting.



Consumers that are currently purchasing More Fresh Produce...



Purchase More Fresh Produce

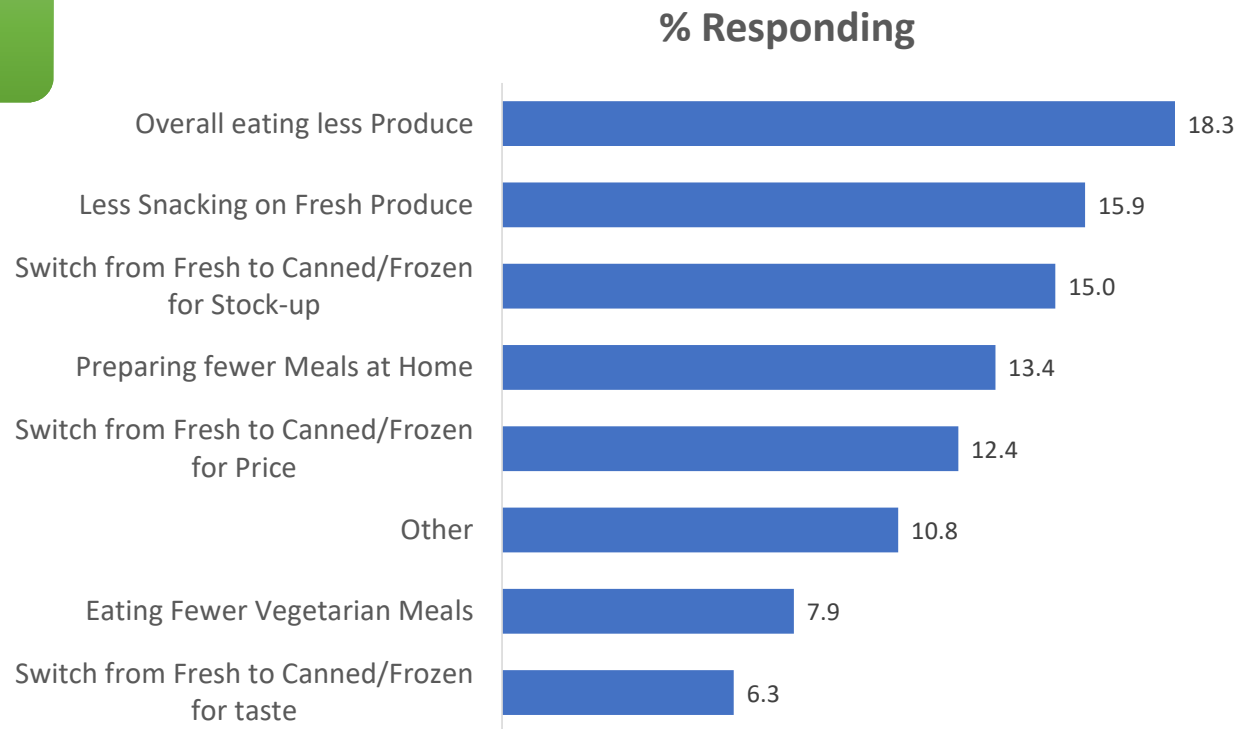
- 🍏 Tend to have an income of \$100,000 or greater
- 🍏 Are likely eating Away From Home More
- 🍏 Are purchasing more Pre-Cut Produce across both Fruits and Vegetables
- 🍏 Are purchasing more Packaged Produce
- 🍏 Are trying new Produce items for Health Benefits, or by coming across an In-Store Display
- 🍏 Are finding Produce Recommendations from Social Media

Those buying less Fresh Produce are eating less Produce in general, or switching to Frozen/Canned for shelf life and price.

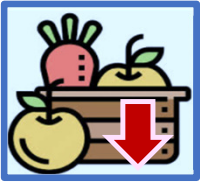


What is the Primary reason you are now purchasing less Fresh Produce?

- There were a wide variety of reasons as to why respondents are currently purchasing less Fresh Produce.
- Those switching from Fresh to either Canned or Frozen, are doing so for Shelf Life or Price, not for Taste.



Consumers that are currently purchasing Less Fresh Produce...



Purchase Less Fresh Produce

- 🍏 Tend to have an income of \$50,000 or lower
- 🍏 Tend to be eating more take out from Restaurants
- 🍏 Are purchasing Less Pre-Cut Produce than before
- 🍏 Are purchasing Less Packaged Produce
- 🍏 Are trying new Produce items when recommended by Friends/Family/Influencers, or when they have tried in a restaurant, or when it is on sale.
- 🍏 Are finding Produce Recommendations from Social Media, and Retailer Websites.

Meal Kits and Prepared Meals are increasingly becoming Once-a-Week Purchases, with dinner and lunch being the most preferred occasions.

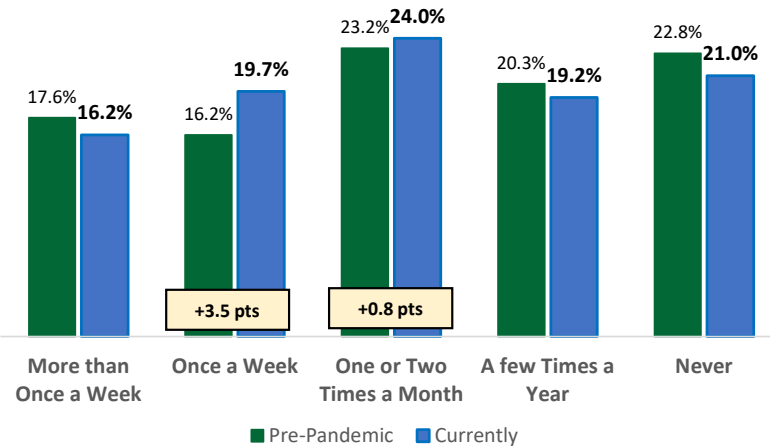


How often do you buy Prepared Meals and/or Meal Kits from your Grocery Store?

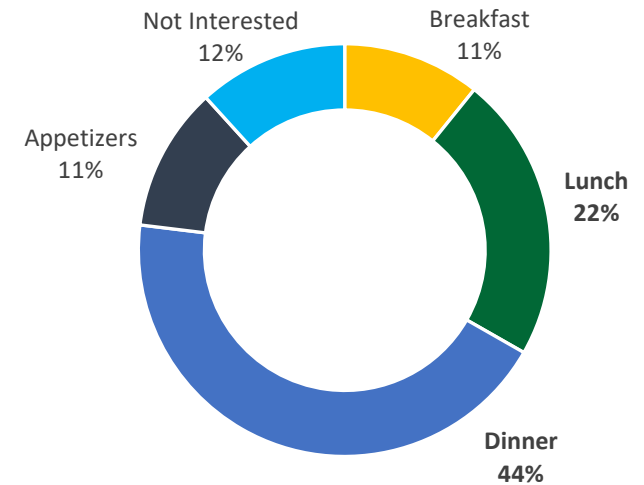


Which meal occasions would you be interested in purchasing a Meal Kit for?

Shifts in Meal Kits/Prepared Meals Purchasing
% Responding

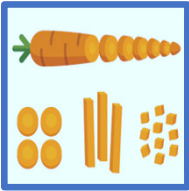


% of Responses



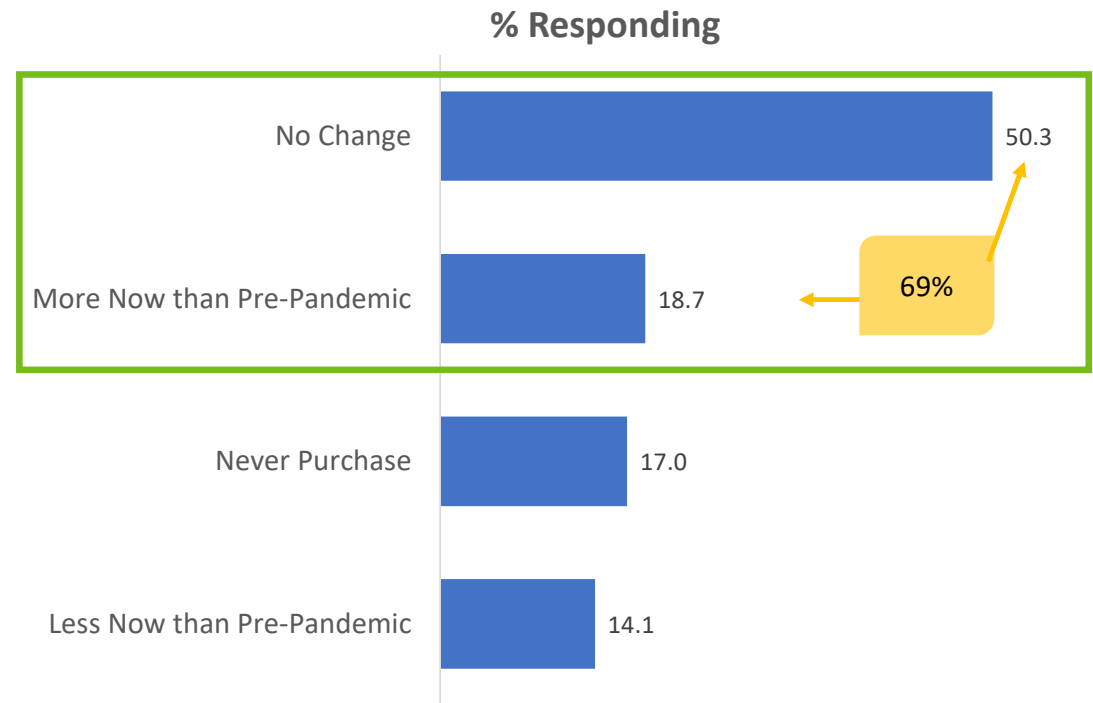
Among those purchasing Once a Week, those 18 to 34 years old gained 4.4 pts and account for 42.5% of respondents

Nearly 70% of Respondents report purchasing the same or more Pre-Cut Produce since the start of the Pandemic

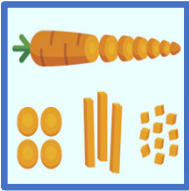


How often do you purchase Pre-Cut Produce?

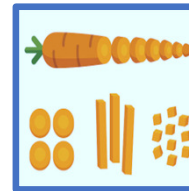
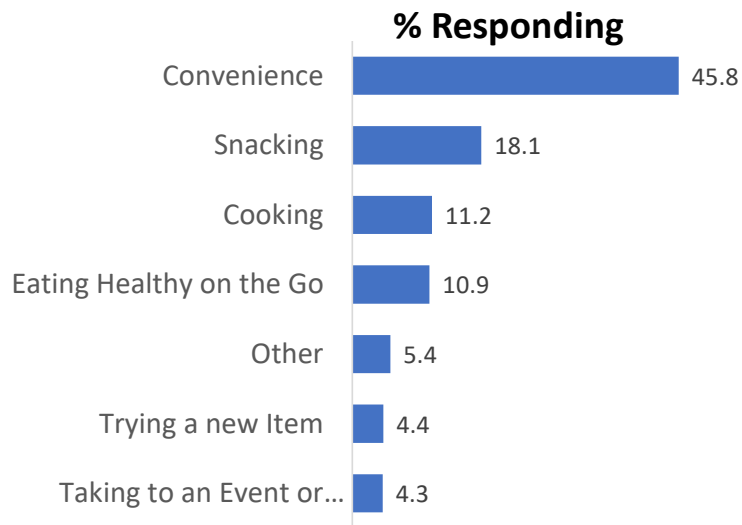
- Half of respondents reported no change in their purchasing of Pre-cut produce since the start of the Pandemic.
- When purchasing Pre-Cut Produce, respondents report purchasing both Fruits and Vegetables in similar quantities.
- Those purchasing more Pre-Cut Produce, tend to be 35 to 44 years old, with income between \$75K to \$100K.



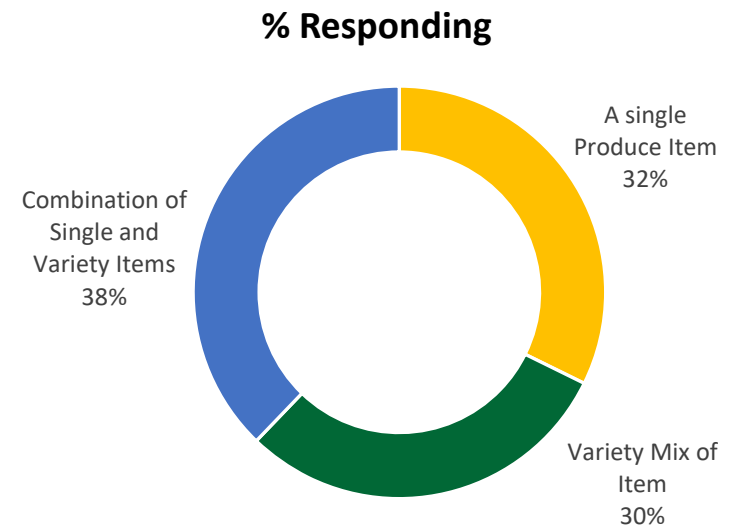
Convenience and Snacking are the primary reasons for purchasing Pre-Cut Produce.



What is your primary reason for purchasing Pre-Cut Produce?



When Purchasing Pre-Cut Produce, which do you purchase most often?



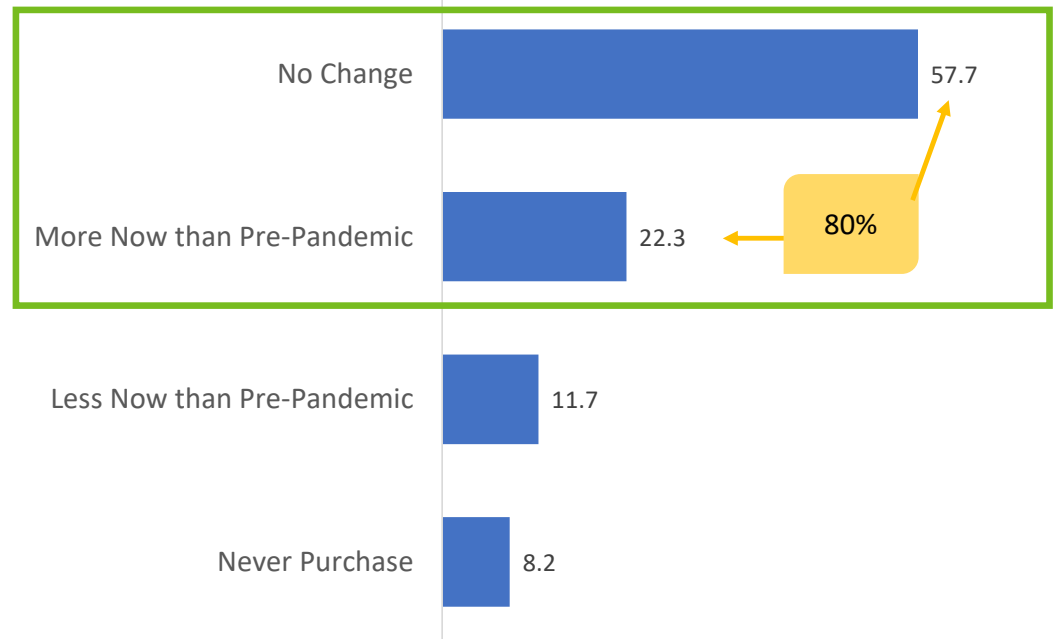
The convenience and safety of Packaged Produce resonates with consumers, with 80% purchasing the same or more since the start of the Pandemic.



How often do you purchase Packaged Produce?

- Over half of respondents reported no change in their purchasing of Packaged produce since the start of the Pandemic.
- Of those reporting a change, there was a 10.6 pt swing in favor of those reporting an increase in purchasing vs those reporting a decline in purchasing.
- Of those purchasing More Packaged since the Pandemic, they also have increased their online shopping rates by 15 pts during that same timeframe, for both delivery and pickup.

% Responding

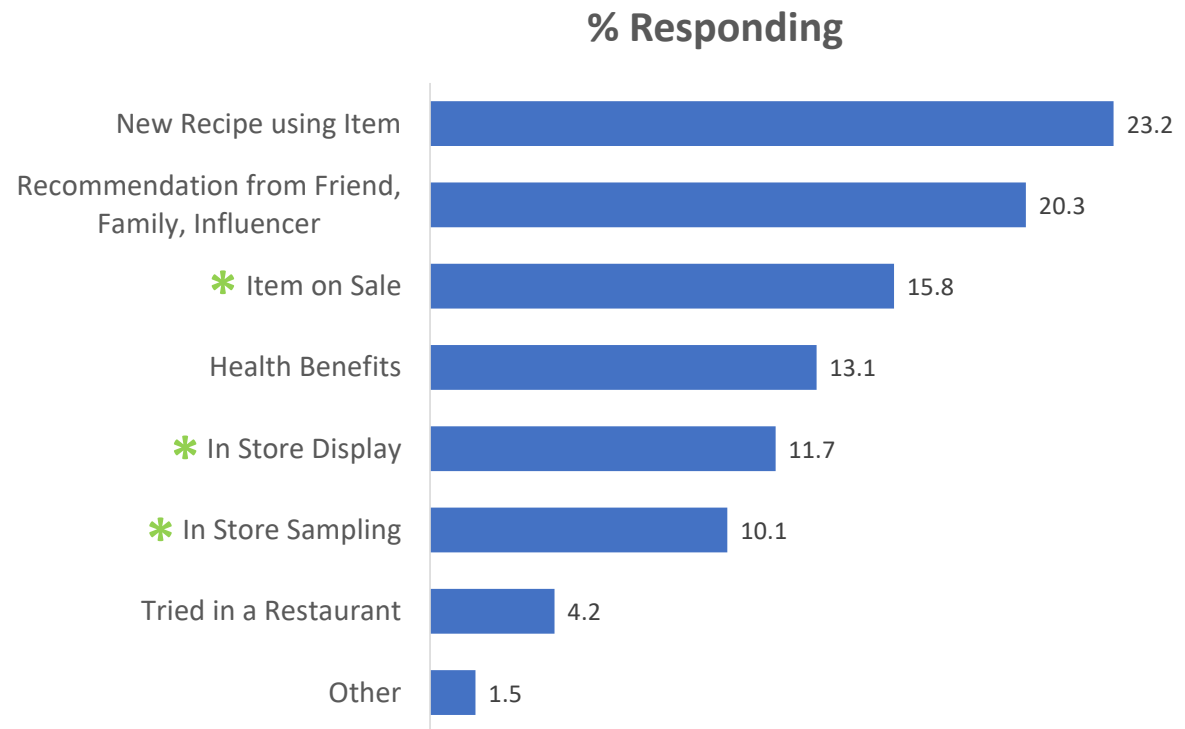


New Recipes and Recommendations drive purchasing of New Produce Items.



What is the Primary reason you would try a new produce item you haven't purchased before?

- 🍏 Retailers impact New item purchasing through Sales, Displays and Sampling, as reported by 30% of Respondents. *
- 🍏 When purchasing a New Item, information and education is key. Nutrition, Recipes, Utilization, and Health Benefits are nearly equally searched for by Respondents.
- 🍏 Recommendations and 'Tried in a Restaurant' over-index with 18 to 24 year olds. In Store Displays and New Recipes over-index with 25 to 34 year olds. In-store Sampling and Health benefits over-index with 65 to 74 year olds.

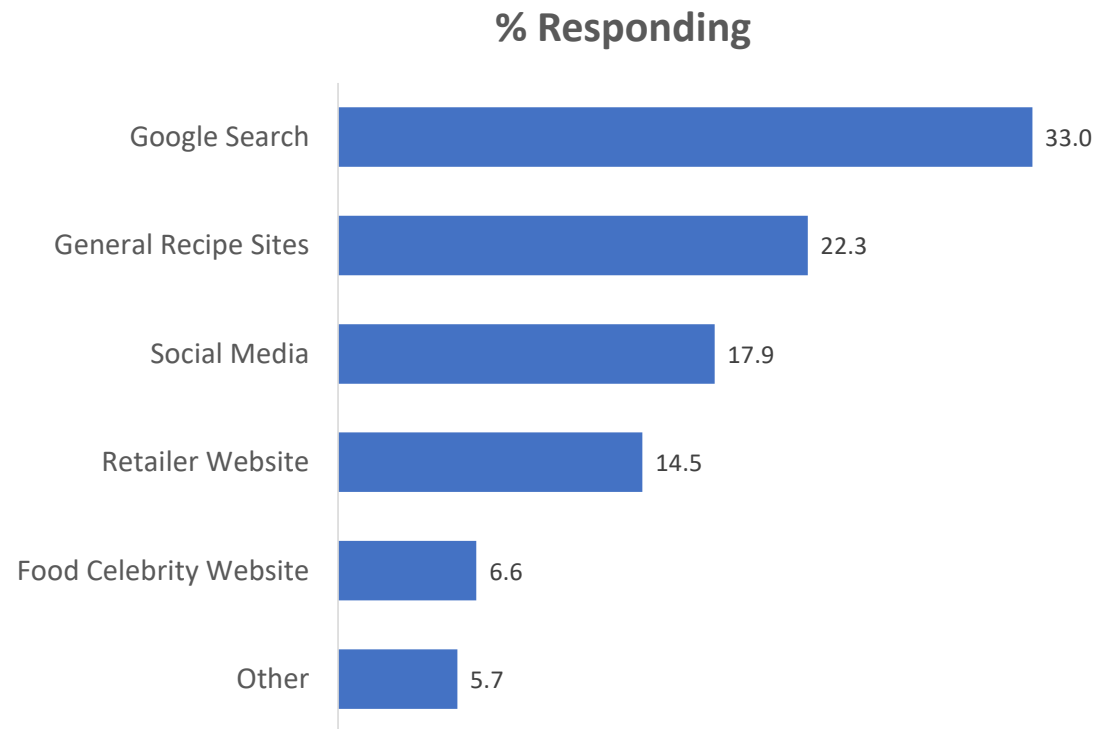


When searching Online, general searches and recipe sites provide the best Fresh Produce recommendations



Which Online platform provides the best Fresh Produce Recommendations?

- 🍏 Retail Websites are searched by over 14% of Respondents.
- 🍏 Food Celebrity Websites are among the least searched sites for Fresh Produce.
- 🍏 Social Media sites are preferred by those 18 to 44 years of age.
- 🍏 Retailer Websites are preferred by those 55 and older.

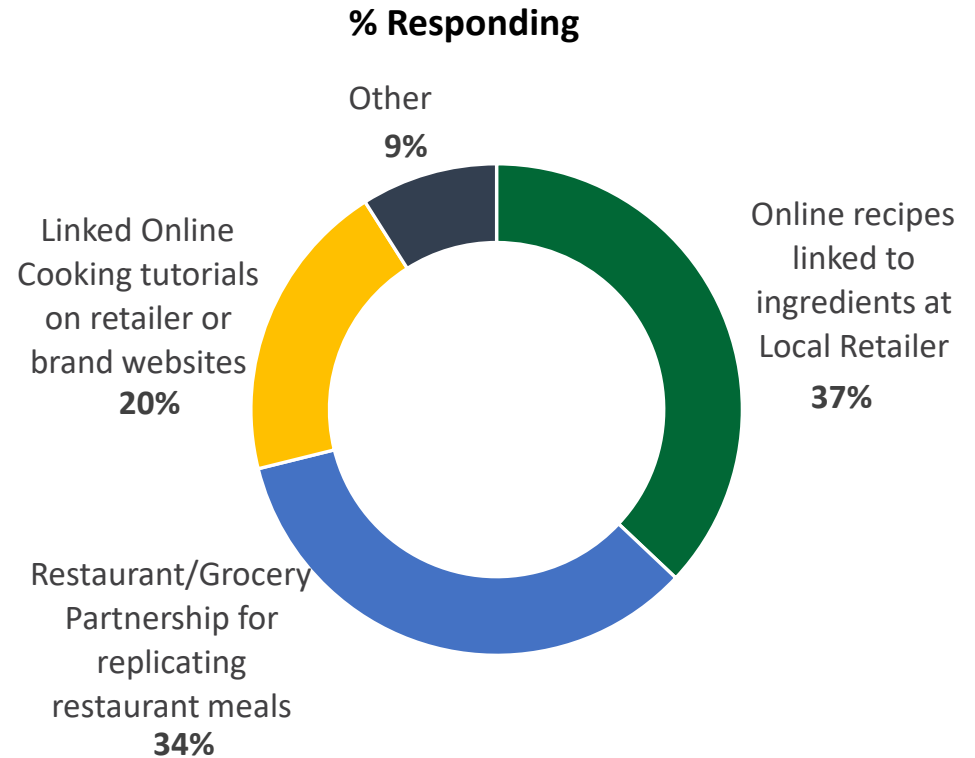


Consumers indicate Online recipes linked to local Grocers and Partnerships with Restaurants would most likely increase their rate of Online shopping



What might increase your rate of online Fresh Produce shopping?

- The majority of 'Other' respondents, noted that nothing would increase their rate of online shopping for Fresh Produce.
- Restaurant / Grocery partnerships could include: A retailer having a meal kit for a restaurant's signature dish with a bounce-back coupon for the restaurant also included in the box.





Additional Research



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Consumers looking for clean, simple ingredients



The focus on benefits of Produce go beyond consumption...

More companies are spending time researching what ingredients are acceptable to consumers in response to the clean label trend

- Of those surveyed, 50% said they are more likely to buy a product if they recognize all of the ingredients listed on the label
- 36% of respondents said they are less likely to buy a product made with an ingredient they don't recognize
- 44% said they are happy to pay a higher price for a product with recognizable ingredients. This is especially notable during a time of widespread economic uncertainty in the face of the COVID-19 pandemic.

Consumer Focus Group Q:

“What would get you to buy more fresh produce?”



“Give me more ways to use fruits and vegetables when they go bad. Ways to use them around the house that helps me reduce the amount I throw away.”



“I would be willing to sample it first if it was a fruit I have never had. And I would prefer it raw to get the raw taste of it first.”



“I would definitely be more willing to buy fruits or veggies if I could try before purchasing it. I think that for fruits I would prefer them raw and veggies cooked.”



“Cooking displays in store that offered samples and had meal kits for sale would make me interested in trying new items.”