

Welcome to your September Consumer Digest, where we unpack the continued return to normal, highlight some recent customer trends around COVID concern, current consumer values, and hear from the customer through human insights on Back to School

We encourage you to treat this as you do your morning news: read it over coffee, discuss it with your teams, use it as a reference in your current work. Feel free to reach out to your 84.51° contact with questions or thoughts!

Included this month:

- **Trends:** A look at return to normal, consumer values, and fall plans
- **Human Insights:** Back to school attitudes around food

Here we go again: a COVID update

U.S. COVID Update⁶:

212M

of people with at least one dose

182M

of people fully vaccinated

64%

% of pop. (12+) Fully vaccinated

75%

% of pop. (12+) With at least one dose

251

7-day case count per 100K people

2.21M

of people who have received a booster shot

U.S. Milestones

- The NFL started their season with full capacity in every stadium¹
- President Biden recently announced all employees at companies with over 100 employees will be required to get vaccinated or tested weekly²
- After a controversial tweet on vaccine efficacy, Nicki Minaj was offered a call with White House doctors to discuss any vaccine questions she might have³

Global Milestones

- After a slow start, Asian countries are ramping up vaccinations, with both China and Japan passing US vaccination rates⁴
- For the first time in more than 2 months, weekly global COVID cases saw a substantial decline⁵

September Customer Trends⁷

This month we take a look at what the increased number of COVID cases means for a return to normal (whatever that means now), as well as what this means for shoppers' priorities in this moment.

TREND #1: Return to normal – Are we there yet?



...said they don't expect their lives to return to a pre-pandemic normal for at least 12 months, indicating that (surprise) we aren't back to normal and might not be for some time. When asked what would signal normalcy, top responses included the end of mask requirements, hearing about it less on the news and not having to social distance.

The increase in cases has caused 66% of shoppers to feel more stressed, with 1 in 4 shoppers saying they are very uncomfortable with trying to make future plans around traveling, events, etc. right now, something that could definitely impact the holidays.

Along with anxiety around making plans, total concern over COVID is also up this month: 44% of shoppers saying they're very stressed about COVID (even higher in the Southeast at 50%), up from 34% last month and marking the 3rd consecutive month of increased concern and the highest level of concern since April.

TREND #2: What should we be serving to customers?

Convenience when it comes to cooking remains essential, as 41% of shoppers claim it is very important. Overall, consumers are looking for easier ways to cook for their families.

Health continues to be a hot topic for many – only 23% of shoppers are very satisfied with their current health this month, compared to 30% in July. Over half are looking for healthier meals.

Shoppers are still searching for value – over two-thirds still feel groceries are more expensive than the previous month and 73% of those that are stressed claim financial reasons – coming in even higher than COVID concerns

What Does Convenient Mean?



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Fall Plans⁷

- 62% of shoppers are planning to celebrate Halloween this year – primarily staying home and handing out candy and going trick or treating in their neighborhood
- As expected, candy is the top Halloween item to be purchased at Kroger, followed by food for a gathering and decorations
- When it comes to fall sports, 58% will be watching from home, while only 8% plan to go to live games



¼ families with children won't be celebrating Halloween

Parents' take on Back to School⁸

As children head back to school, we look at how consumers are taking a different look at the health of food, now seeing COVID as a risk that can be lessened with good dietary habits, as well as how mealtime is changing.

Parents Using Food to Protect Kids



- With the Delta variant making children more susceptible to COVID, parents are understandably anxious about the return to in-person schooling
- Some parents are using the opportunity to educate their children, trying to set them up for long-term success and healthy choices
- As a result, parents are turning to the aspect of school they can control – food – to help ease their anxiety and try to keep their kids healthy

"There's so much I don't know and that's what I'm worried about. How are they going to do lunch? What about gym class? I'm even writing down questions during this interview"

"Especially when school's about to start, it's really important to me as a parent to be able to feed my kid things that will help him stay healthy and successful throughout the day"

"We'll let our daughter make her lunch and ask her what she thinks should go in it. We can't always monitor what she eats. So by getting her involved, we're teaching her to do it herself"

"I try to pack my daughter's lunch with high vitamin C fruits like strawberries, oranges, even gummy vitamins that she thinks are fruit snacks"

How might we use this as an opportunity to connect with parents, supporting in selecting immuno-boosting foods and educating their children on healthy choices?

Changes in Mealtime Sources

How Meal Time is Changing for Families with Kids⁹

■ Less ■ About the same ■ More



Families are increasingly eating breakfast and lunch on the go, but more frequently sitting down for dinner together at home.



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SOURCES: 8) Gemic Qualitative Customer Work, September '21 9) September Thought Leadership Survey