

Welcome to your October Consumer Digest. This month, we're highlighting how consumers are gearing up for the holidays from shopping to meal planning and participation in events. We also see how consumers are planning for cold and flu season. Discuss these insights with your teams and use it as a reference in your current work. As always, reach out to your 84.51° contact with questions or feedback.

### Included this month:

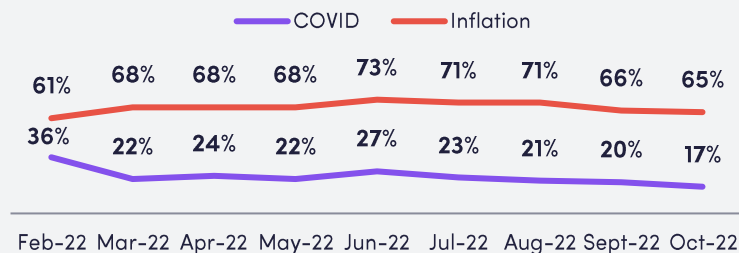
- How are customers getting ready for **cold & flu season**?
- **Shrinking pack sizes – are consumers noticing “shrinkflation”?**
- Will inflation **impact Thanksgiving**?
- Are shoppers **buying in bulk to combat inflation**?
- Are consumers **spreading out holiday purchases** to balance their budgets?

## Shopper Concern – It’s Not Over Yet

**While shopper concern for COVID has steadily declined, almost a quarter of respondents do not agree at all that it is over.**

- Respondents 45-74 years old are especially more likely to not believe COVID is over.
- Concern for the upcoming Flu season is lower than COVID concern, with 12% of respondents citing they are Extremely Concerned (T2B) about the Flu.
- Inflation concerns remain steady compared to September, and this concern is especially pronounced with respondents 55-74 years old with 79% of them saying they are Extremely Concerned (T2B).
- While over 50% of respondents still cite that they’d be willing to switch to lower priced brands in Shelf Stable, Household Cleaning and Paper products, there were notable increases (+6 percentage points or more) in respondents citing this willingness to switch in Dairy, Frozen Foods, Drinks and Pet food compared to September.

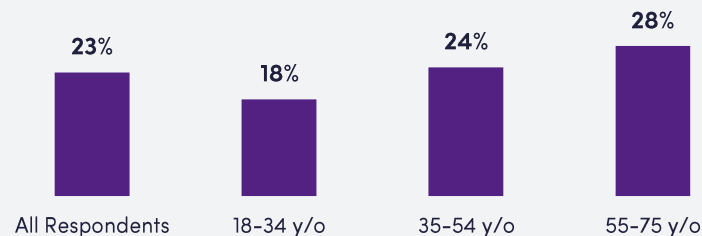
**Shopper concern for COVID and inflation?**  
% of Households Extremely Concerned (T2B)



SOURCE: 84.51° Real Time Insights Surveys Feb 2022 – Oct 2022



**Is COVID over?**  
% of Households who Do Not Agree At All (Bottom Box)



SOURCE: 84.51° Real Time Insights Survey October 2022



SOURCES: 1) Real Time Insights Survey, October 2022 targeting n=400 of Gen Population who shopped Kroger in Latest 3 Months

## How are Shoppers Getting Ready for Cold & Flu Season?

- Tissues, Cough Drops and Disinfectants are the top items that shoppers are stocking up on to get ready for Cold & Flu season.
- Shoppers 55-74 are less likely to stock up than those who are younger.
- 27% of Shoppers claim they will stock up on Natural Remedies for Cold & Flu.

### Top Items that Customers are Stocking Up on for Cold & Flu Season

	Tissues	Cough drops/throat lozenges	Disinfectant spray/wipes	Hand sanitizer	Everyday multi vitamins	Over the counter cough medication	Ibuprofen	I do not plan to stock up
<b>Overall</b>	<b>53%</b>	<b>49%</b>	<b>49%</b>	<b>46%</b>	<b>44%</b>	<b>42%</b>	<b>40%</b>	<b>14%</b>
18-34 y/o	55%	52%	61%	59%	45%	51%	47%	9%
35-54 y/o	56%	50%	49%	43%	45%	41%	39%	13%
55-74 y/o	30%	37%	30%	33%	33%	35%	30%	35%

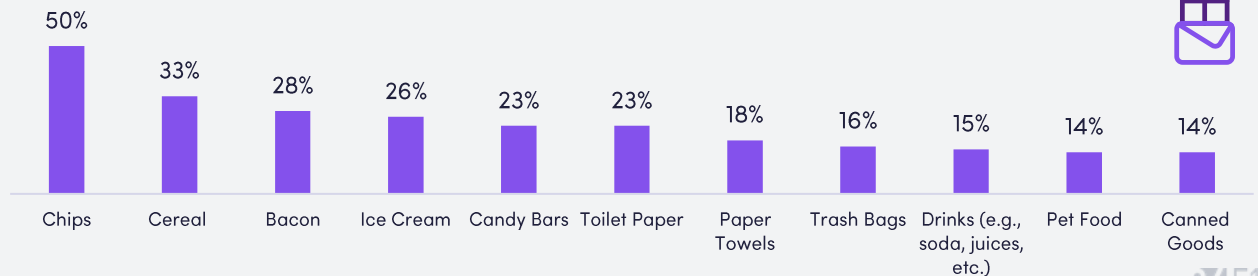
SOURCE: 84.51° Real Time Insights Survey, October 2022



## Are Shoppers Noticing Shrinking Pack Sizes?

- While 29% of shoppers say they have not noticed any categories that are shrinking pack sizes, 45% of shoppers who are noticing will buy a different brand that hasn't reduced its size, 42% say they will buy it if they have a coupon, 17% won't buy the item at all, and 10% will buy more packages to make sure they are getting enough product. 40% say they will still purchase the item with the reduced size.

### What categories consumers have recently noticed shrinking pack sizes



SOURCE: 84.51° Real Time Insights Survey, October 2022



## Buying In Bulk

- Close to 75% of consumers are currently buying bulk items in categories like paper products (55%), household cleaners (dish soaps, surface cleaners, laundry detergents, air fresheners, etc.) (35%), shelf stable items (canned goods, pastas, etc.) (26%), and personal care items (22%).
- Most often, shoppers are buying these items at a physical grocery store. Specifically in the frozen food category, shoppers say they typically purchase frozen food at a club store just as much as they do at a physical grocery store.
- Shoppers with a HH income of less than \$50k per year are purchasing fewer bulk items across the majority of categories when compared to those making more than \$50k per year.

## Last Chance to Prep for Halloween

### DID YOU KNOW?

Many shoppers wait until the “last minute” to buy Halloween Candy.

**30% of all Trips** for Candy in the month of October last year happened in the 7 days leading up to and including Halloween.

SOURCE: 84.51° Stratum October 2021 Continuous Panel

**17% of all Trips** for Candy in the month of October last year happened in the **last 3 days** of October (including Halloween).

SOURCE: 84.51° Stratum October 2021 Continuous Panel

## Will Inflation impact your Thanksgiving Meal?

- Almost 2/3 of customers claim they will celebrate Thanksgiving with the same number of people as last year, with those under 55 most likely to celebrate with more people than last year.
- While most customers celebrating Thanksgiving will eat a traditional Thanksgiving Meal cooked at their/someone else's home, more than 15% of customers will purchase a Thanksgiving Meal that is already prepared.
- 70% of customers say they will only shop in-store for their Thanksgiving meal, with the other 30% either exclusively online or combination of in-store and online shopping.

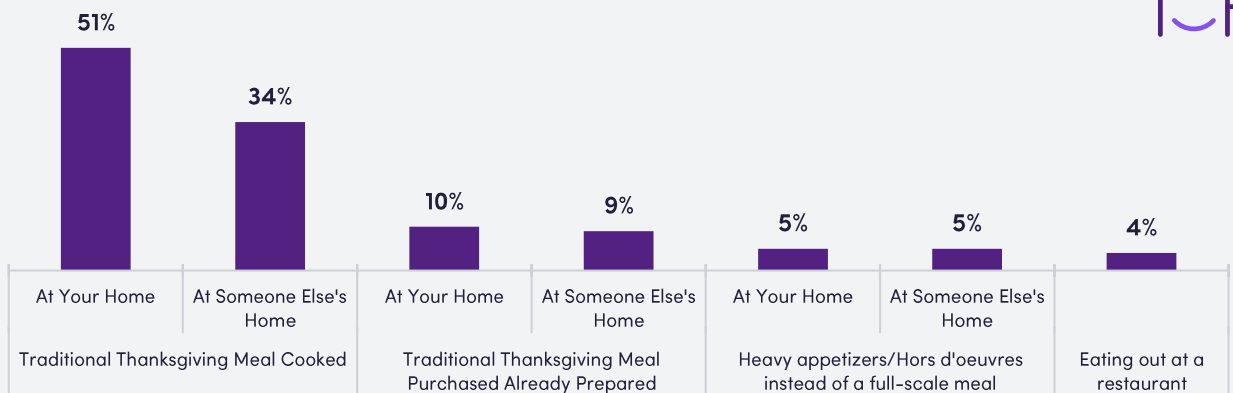
**38% of shoppers will cut back on their Thanksgiving Meal due to inflation.**



Of those cutting back...

- 45% will cut Turkey or Pumpkin Pie
- 37% will cut Corn Bread
- 32% will consider Cranberry Sauce, Stuffing or Macaroni & Cheese

What type of Thanksgiving Meal are Customers Having? Of those customers planning to celebrate Thanksgiving...

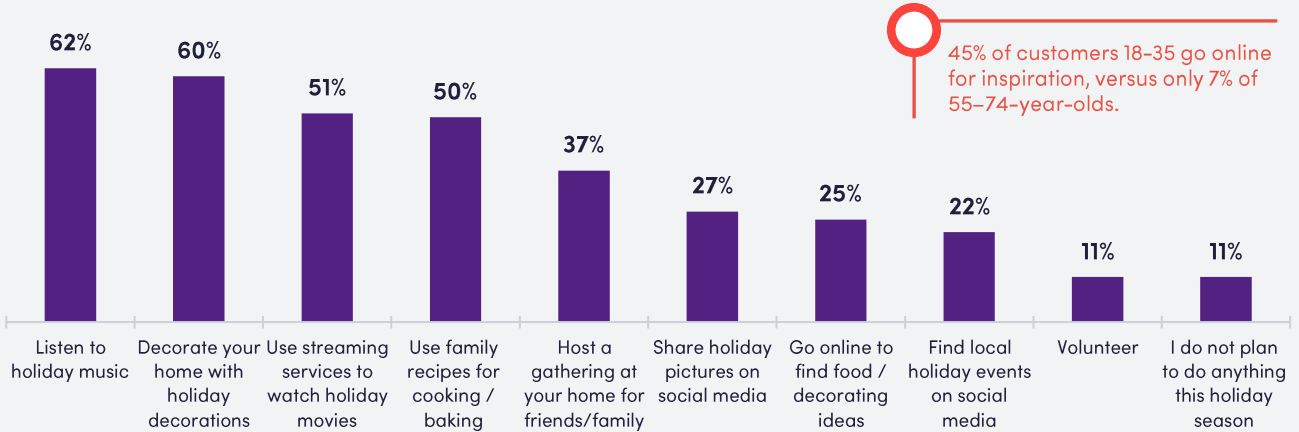


SOURCE: 84.51° Real Time Insights Survey October 2022

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## Getting in the Holiday Spirit

What things do you plan to do this upcoming holiday season?



45% of customers 18-35 go online for inspiration, versus only 7% of 55-74-year-olds.

SOURCE: 84.51° Real Time Insights Survey October 2022

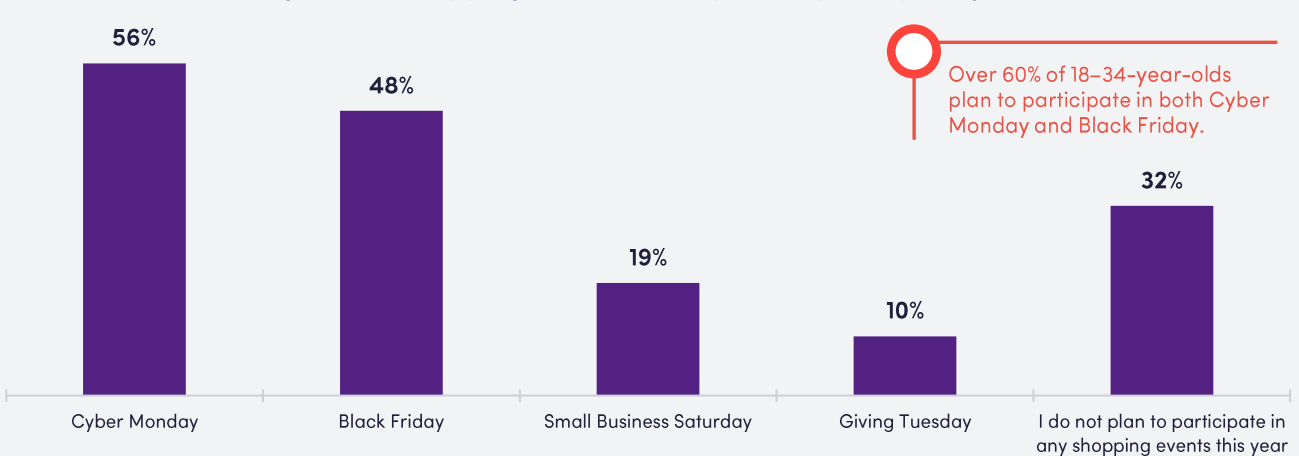


## When Will Consumers Shop for the Holidays?

- As of October, 25% of customers have already begun their Holiday Shopping, with another 57% beginning in the next few weeks to month.
- 9% will not shop until the final week before their Holiday, and another 10% do not plan to shop at all.
- Cyber Monday is more popular with customers than Black Friday, and the gap is especially pronounced with those making over \$100K per year. 69% of these customers plan to participate in Cyber Monday.



Which of the following holiday shopping events do you plan on participating in this year?



Over 60% of 18-34-year-olds plan to participate in both Cyber Monday and Black Friday.

SOURCE: 84.51° Real Time Insights Survey October 2022



## Making customers' lives easier



While concern over COVID has gone down this year, not everyone believes it is over. Help your customers be prepared for this and cold & flu season with items that they like to stock up on.



While Thanksgiving dinner for most will be unaffected by inflation, almost 40% of customers say they will cut back. Ensure customers have options on their Thanksgiving staples to enjoy the season in a way that fits their budget.



Many customers notice when package sizes reduce and will often switch to other brands when it happens. Find ways to communicate value to your customers to avoid losses to your products due to "shrinkflation."



25% of all customers and 45% of 18–34-year-olds are looking online for Holiday inspiration. Position your products to help customers find new ways to celebrate the Season.

## Introducing 84.51° In-Queries – The right research. Right away.

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### Connect with us

Have a specific question that isn't answered by one of our standard solutions? Reach out to your [84.51° partner](#) or [Insights@8451.com](mailto:Insights@8451.com) to see how we can help.