

The Great Consumer Shift: How US Shopping Behavior is Changing

McKinsey's Global COVID Consumer Sentiment Survey collects and connects data across 45 different countries. These insights were shared at the 2020 FC Connect Digital Insights Summit and focus on U.S. behavior, within a global context.

Shift to Value & Essentials



Grocery

is the only category to maintain positive net spending globally



Household Supplies & Entertainment

are two categories with rising spend in the recent months

Flight to Digital & Omnichannel

More people expect to make a portion of their purchases online post-COVID than before.

Within 3 months, we advanced in digital and omnichannel 10 full years as people shifted online.



15-35%

increase in online purchases

Consumers are also increasing their digital adoption in:



ENTERTAINMENT



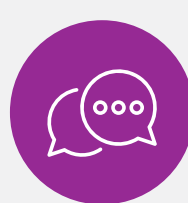
DELIVERY



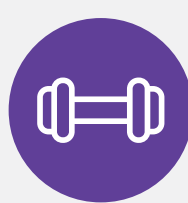
FOOD



SHOPPING



COMMUNICATION



WELLNESS

Shock to Loyalty

77% of US consumers have tried new shopping behaviors

Consumers are also increasing their digital adoption in:



NEW SHOPPING METHODS



DIFFERENT BRAND



DIFFERENT RETAILER, STORE OR WEBSITE



PRIVATE LABEL OR STORE BRANDING



NEW DIGITAL SHOPPING METHODS



COMBINING MULTIPLE BEHAVIORS

Top 3 Drivers for Choosing a New Place to Shop:



Value



Convenience



Availability

Health & Caring Economy

Cleaning and sanitization used to be the #1 criteria, but in the last month or so, has fallen into second place with 23% of respondents naming it their primary criteria.

34%



of surveyed consumers selected masks & barriers as their primary criteria for deciding where to shop

Consumers are paying increased attention to how a company treats its employees, because how they care for their employees is an indication of how they care for their customers.

25%



of respondents do more shopping with brands based on how they treat their employees

Homebody Economy

In the U.S., consumers are awaiting several milestones in order to engage in formal day-to-day activities.

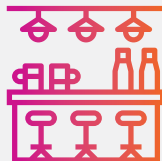


34%

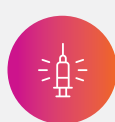
of people are not engaging with 'normal' out-of-home activities

When will day-to-day activities return?

34%



of survey respondents say that when government lifts restrictions and medical authorities deem safe, indoor spaces start taking safety measures, or they see other people returning



21%

are waiting until there is a vaccine or treatment



19%

are waiting until government lifts restrictions

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