



2020 U.S. Online & In-Store Grocery Shopping Study

Food Shopping During the COVID-19 Pandemic

June 2020

About the Study

Understand online grocery shopping and in-store supermarket shopping during the COVID-19 pandemic

2000

Total Respondents

Shopped In A Traditional Supermarket
or Online With Any Store or Online
Provider for Food/Groceries At Least
Once In Last 30 Days

1000

Online Grocery
Shoppers Across All
Stores/Providers

1000

In-Store Supermarket
Shoppers

Census

Match U.S. Population
on Age and Region

Data Collected

Late April / Early May 2020

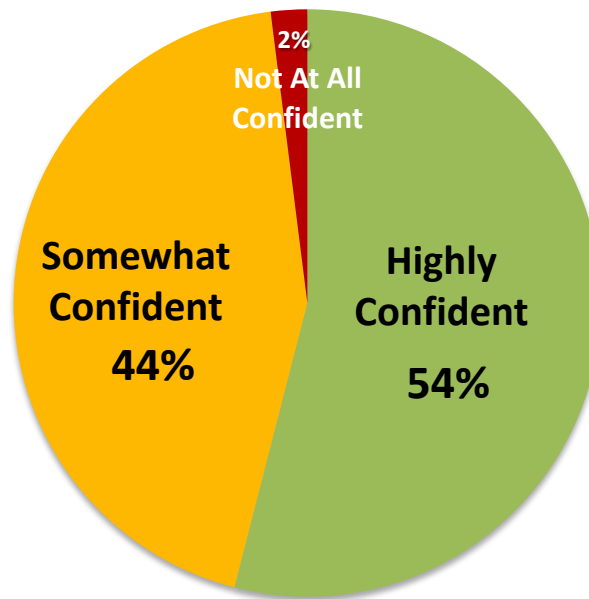
65%/35%

Female Male

Confidence in Safety of Food

“How confident are you that the food you purchase, whether in a supermarket or online, is safe to eat?”

Slightly more than half of the shoppers indicated they were highly confident that the food they purchased during the pandemic was safe to eat, with most of the balance indicating they were somewhat confident. This shows that many shoppers need reassurance that the food supply is safe.



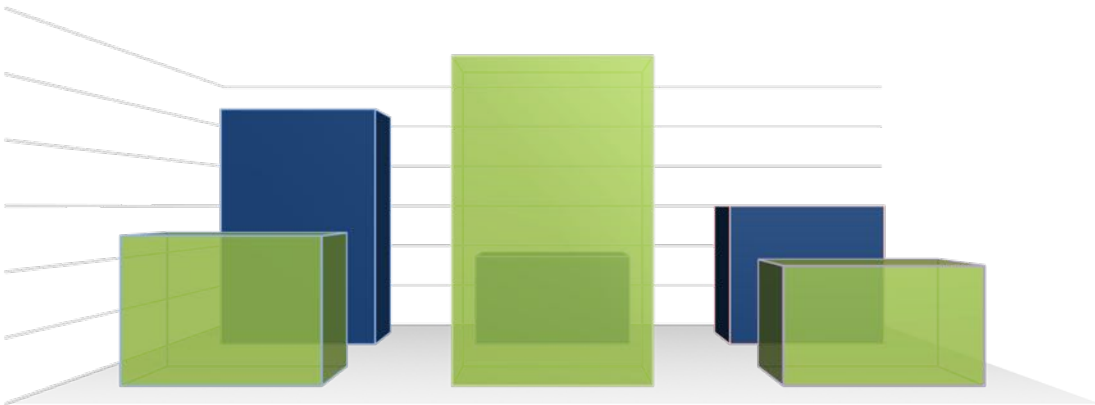
Frequency of Shopping and Amount Spent Now Versus Pre-Pandemic

Shopping Frequency Now

“How frequently, in terms of NUMBER of shopping trips or online orders, are you shopping NOW for food and grocery items as compared to before the COVID-19 pandemic began?”

Spending Now

“How MUCH are you SPENDING NOW, in total, for food and grocery items, either in a supermarket or online, compared to before the COVID-19 pandemic began?”

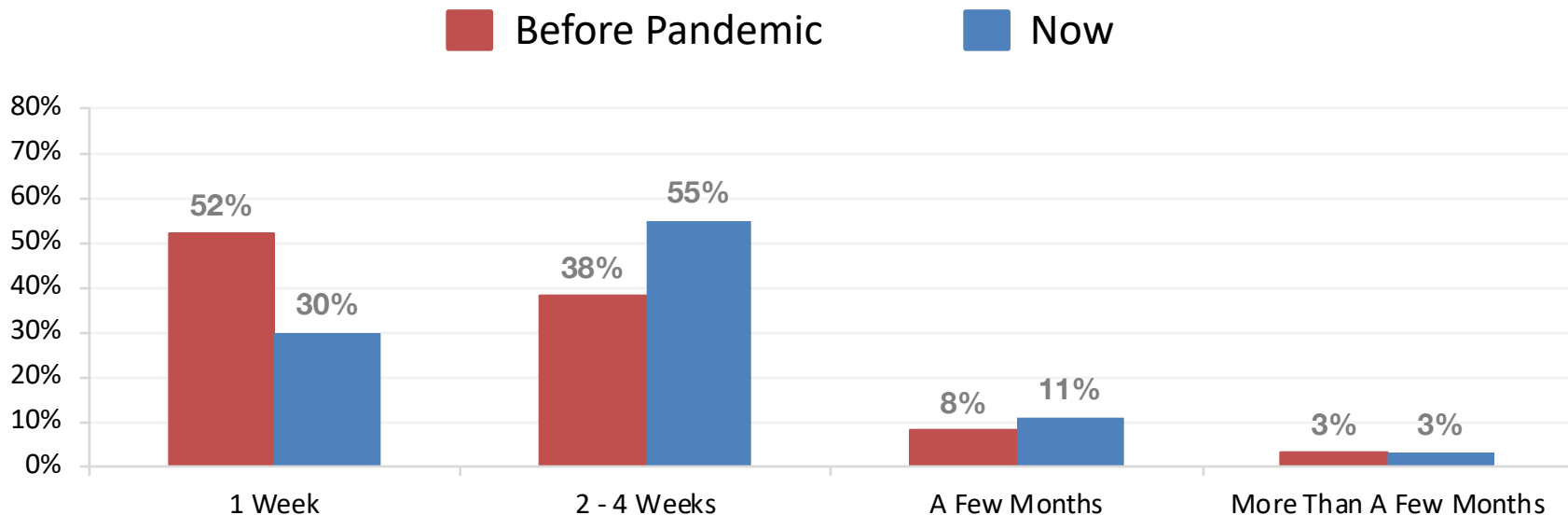


Compared to pre-pandemic, just over half the shoppers are **shopping less frequently** and about the same percent are **spending more per trip**.

	More	Less	About The Same
■ Frequency	25%	55%	20%
■ Spending	51%	19%	30%

Products Kept On Hand Now versus Pre-Pandemic: MEAT/SEAFOOD

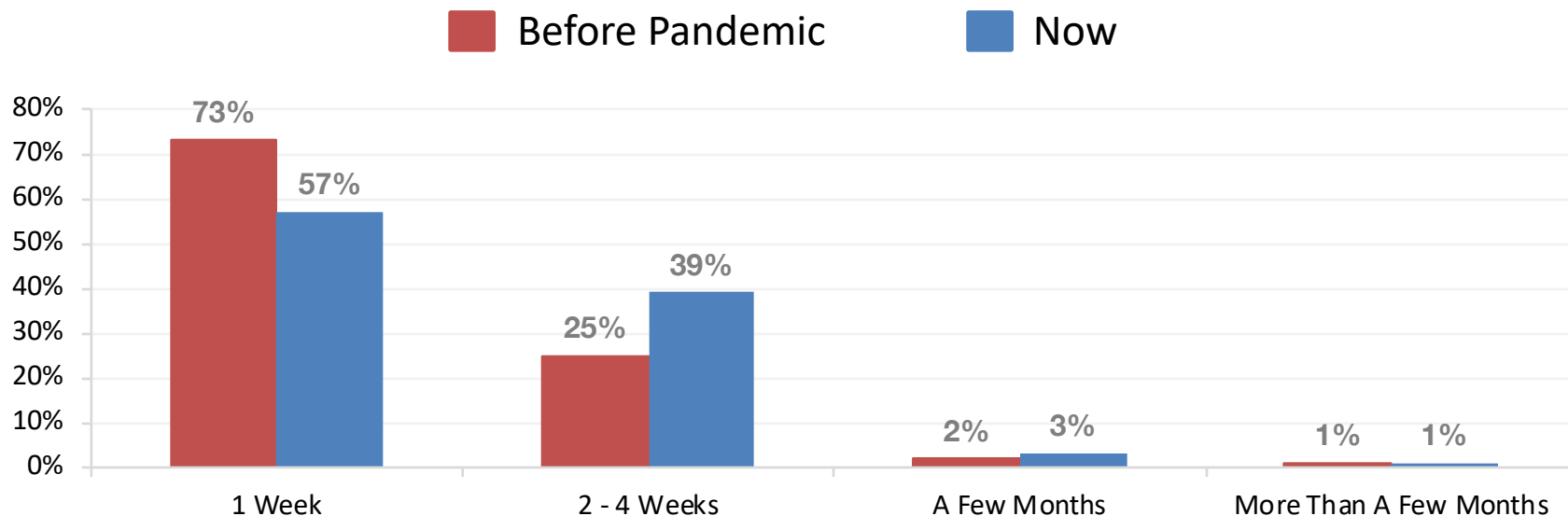
“Thinking back to BEFORE the COVID-19 pandemic, for items or products you use often, how much did you typically keep on hand? How much do you NOW prefer to keep on hand?”



Now, more shoppers (55%) are keeping meat and seafood on hand for 2 to 4 weeks versus pre-pandemic where the highest percentage of shoppers kept one week on hand (52%).

Products Kept On Hand Now versus Pre-Pandemic: PRODUCE

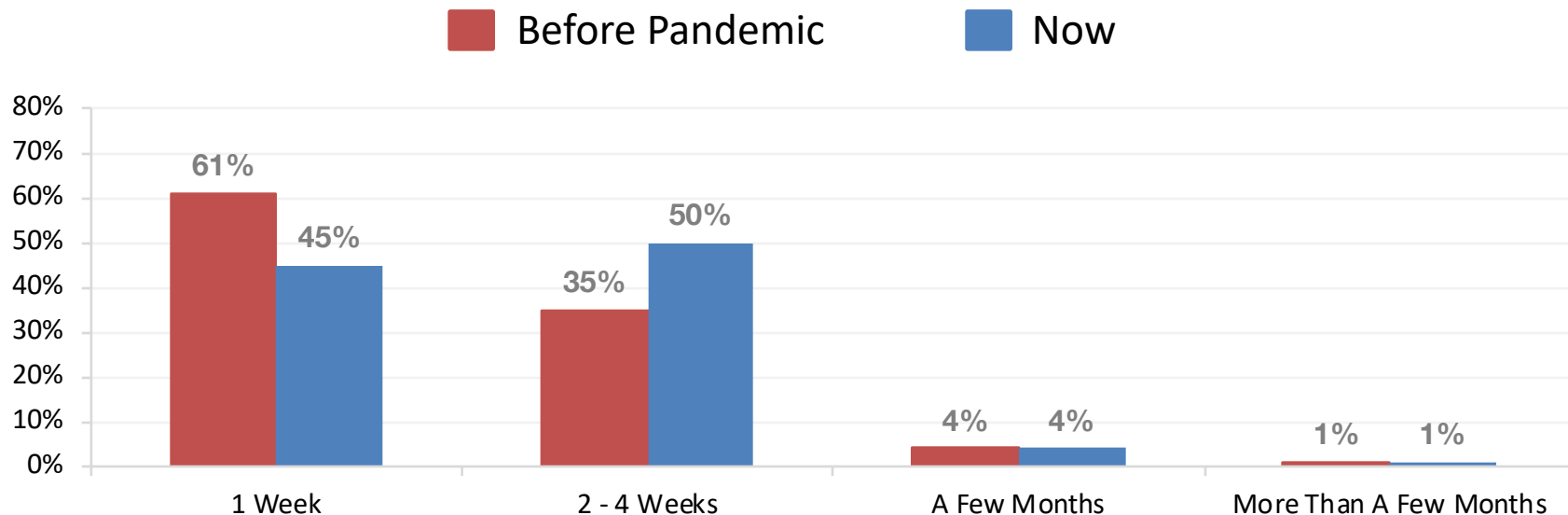
“Thinking back to BEFORE the COVID-19 pandemic, for items or products you use often, how much did you typically keep on hand? How much do you NOW prefer to keep on hand?”



While the majority of shoppers still keep one week of produce on hand now (57%) versus pre-pandemic (73%), some shoppers have moved to keep more on hand for 2 to 4 weeks now (up to 39% versus 25% pre-pandemic).

Products Kept On Hand Now versus Pre-Pandemic: REFRIGERATED/FRESH

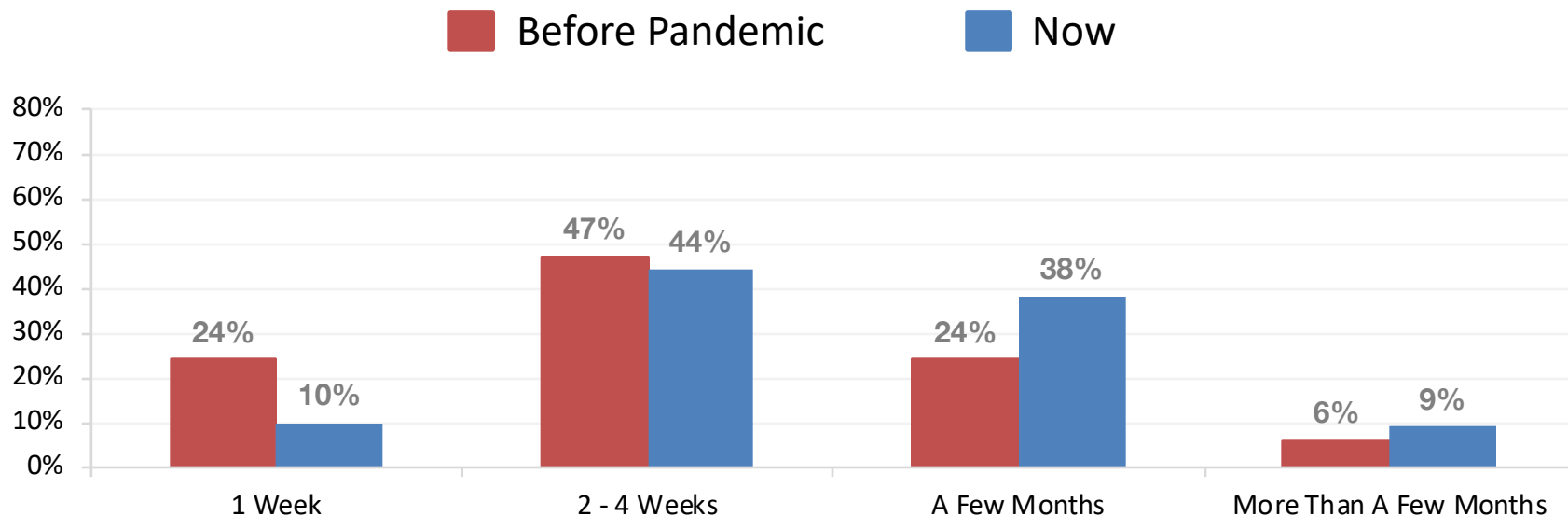
“Thinking back to BEFORE the COVID-19 pandemic, for items or products you use often, how much did you typically keep on hand? How much do you NOW prefer to keep on hand?”



Before the pandemic 61% of shoppers indicated they kept one week of refrigerated and fresh items on hand and 35% kept 2 - 4 weeks on hand. Post-pandemic, more shoppers (50%) now keep 2 - 4 weeks on hand.

Products Kept On Hand Now versus Pre-Pandemic: FROZEN

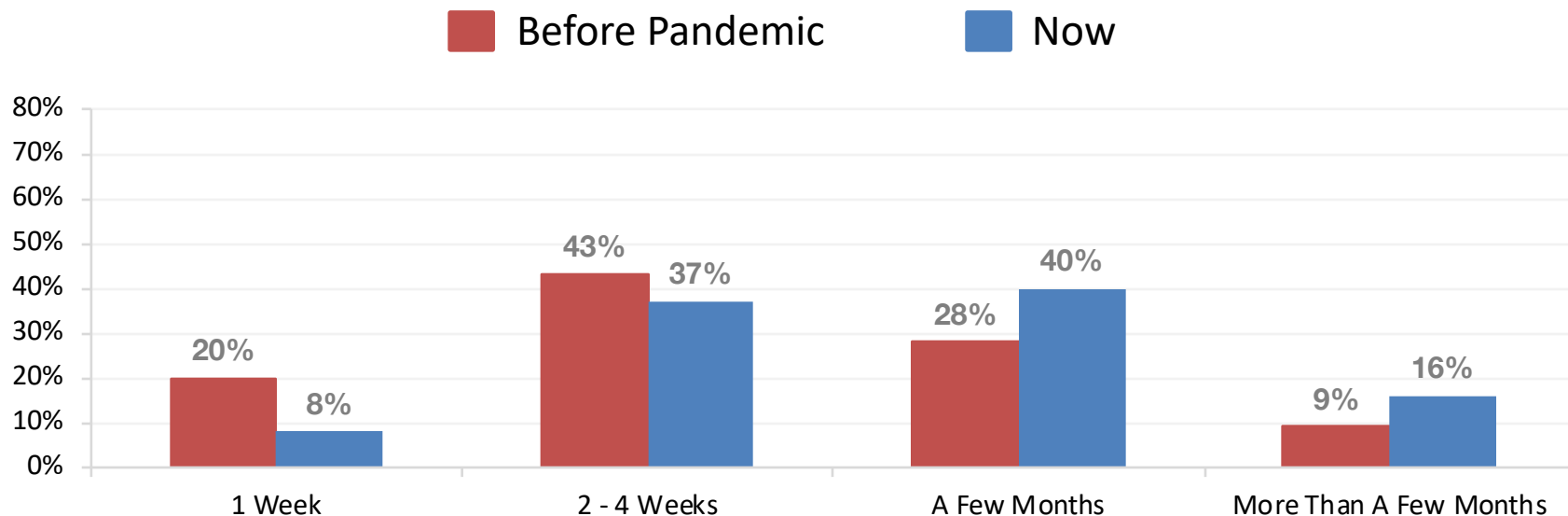
“Thinking back to BEFORE the COVID-19 pandemic, for items or products you use often, how much did you typically keep on hand? How much do you NOW prefer to keep on hand?”



Pre-pandemic nearly half (47%) of shoppers kept 2 - 4 weeks of frozen items on hand and another 24% kept a few months, while 24% kept a week. Now, a higher percentage is stockpiling a few months (38%) and a similar number are keeping 2 - 4 weeks on hand (44%) while fewer (10%) just have a week's worth.

Products Kept On Hand Now versus Pre-Pandemic: CANNED/BOXED

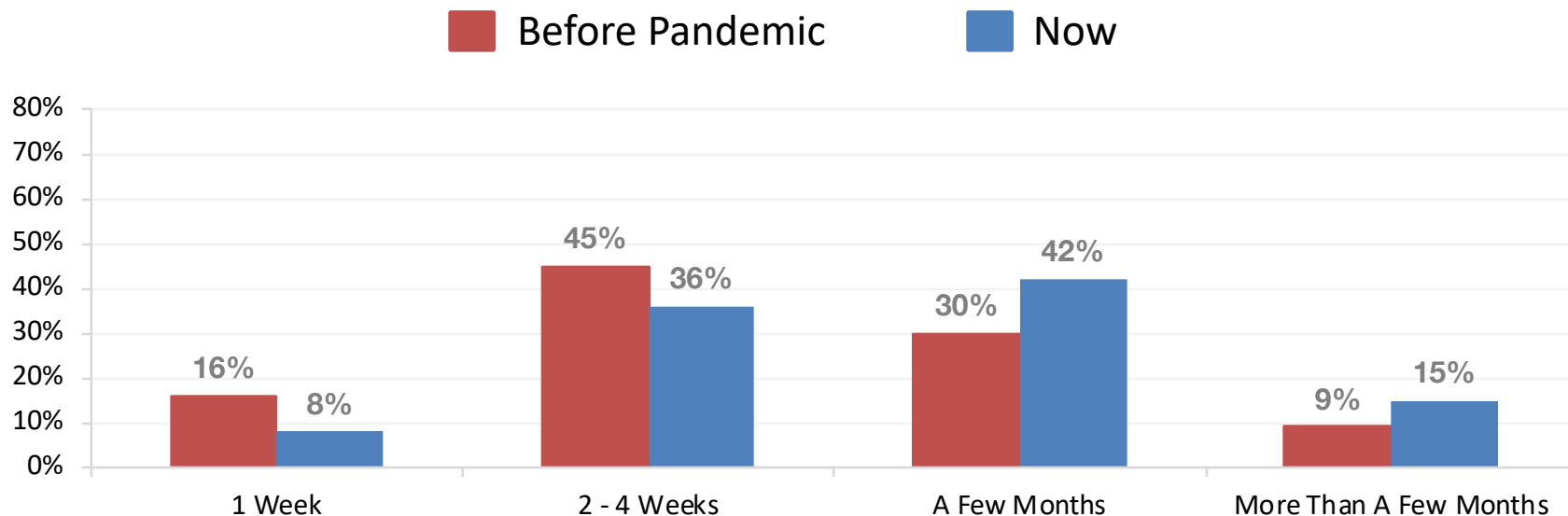
“Thinking back to BEFORE the COVID-19 pandemic, for items or products you use often, how much did you typically keep on hand? How much do you NOW prefer to keep on hand?”



With canned/boxed items, about half as many now (8%) keep only a week on hand versus pre-pandemic (20%). Slightly more (43%) keep 2 - 4 weeks on hand now versus before (37%). But higher percentages of shoppers are keeping a few months (40% now versus 28% before) and more than a few months (16% now versus 9% before).

Products Kept On Hand Now versus Pre-Pandemic: PERSONAL CARE/PAPER/HOUSEHOLD

“Thinking back to BEFORE the COVID-19 pandemic, for items or products you use often, how much did you typically keep on hand? How much do you NOW prefer to keep on hand?”



Pre-pandemic, 39% kept a few months/more than a few months of these products on hand and now 57% do so.

Top Products Kept On Hand

“What kinds of supermarket items are you stocking up on more now than you typically kept on hand in the past? List as many items as you would like.”

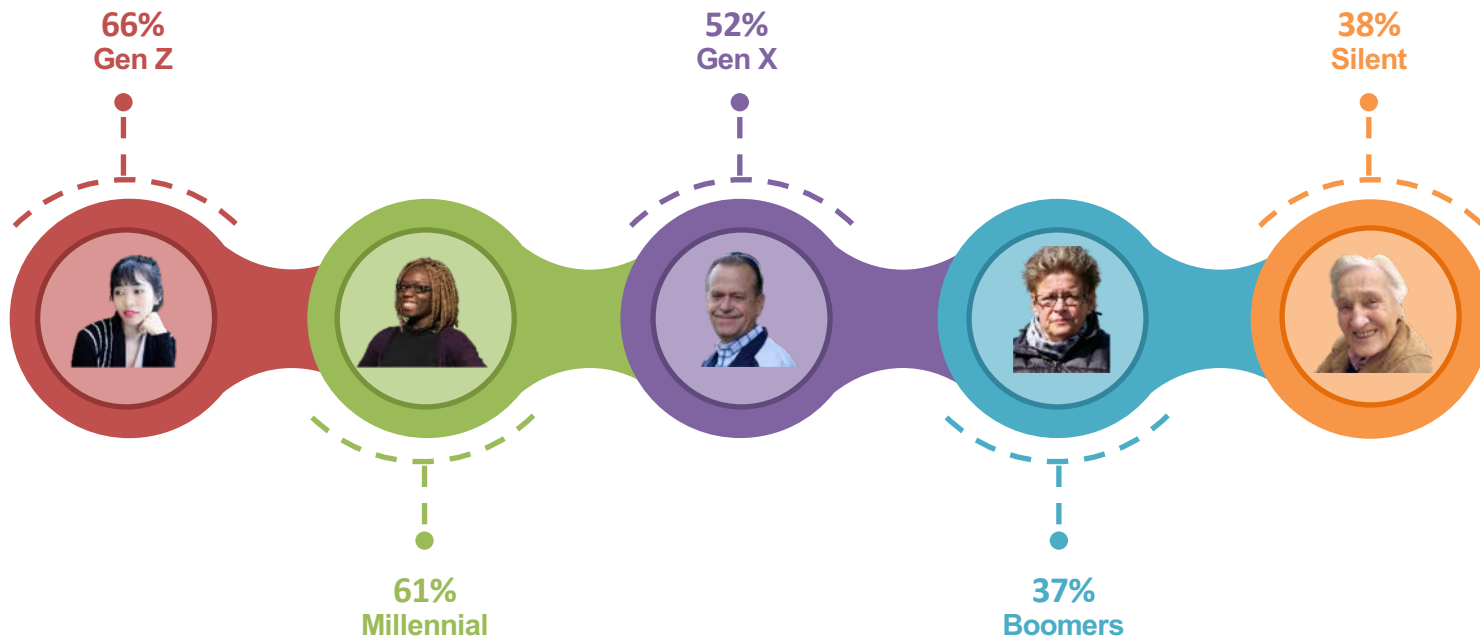


Supermarket shoppers now keep more paper products, canned, dried, or boxed foods, fresh meat, pasta / grains, and frozen items on hand than before the pandemic.

Shopping Both Online & In-Store

Overall, 50% of In-Store Supermarket Shoppers In Last 30 Days Also Ordered Groceries Online

Comfort with dual-channel food shopping is highest among the supermarket customers of the future

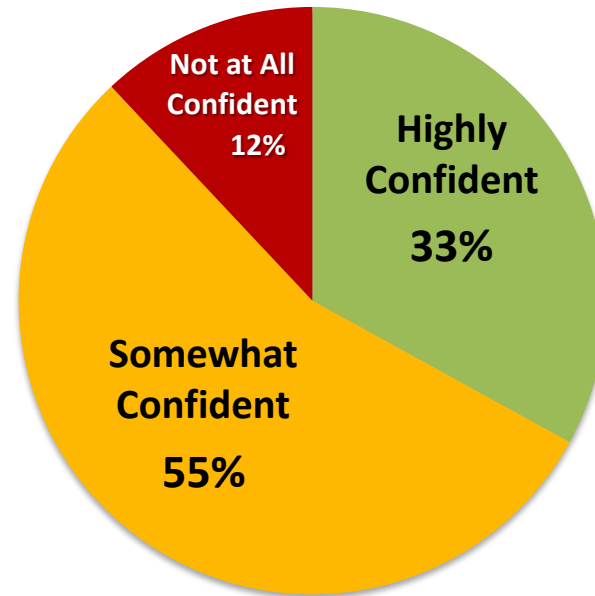


In-Store Supermarket Shoppers

Confidence in Safety of Shopping in a Supermarket

“Apart from the food itself, how confident are you that it is safe to shop in the supermarket?”

Based on the finding that 67% of shoppers are somewhat or not at all confident that it is safe to shop in the supermarket, stores will need to gain back and maintain shopper confidence in the physical store environment.



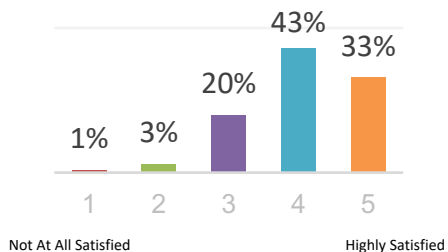
Primary Supermarket Satisfaction

Serving Customers & Impression of Employee Treatment

“Overall, how satisfied are you with how the supermarket you shop most often has done in serving its customers throughout the COVID-19 pandemic?”



SATISFACTION SERVING CUSTOMERS

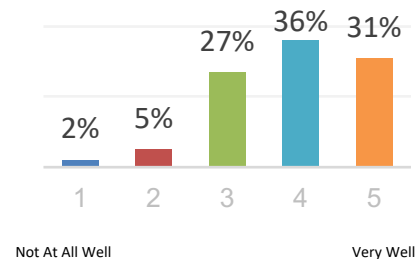


Average = 4.04

“Overall, how well does it seem the supermarket you shop most often has done in treating its employees throughout the COVID-19 pandemic?”



HOW WELL TREATED EMPLOYEES



Average = 3.90

Despite retailers' best efforts, U.S. consumers had reservations about how well their primary store treated its customers and employees.

Primary Supermarket - What Done Well During Pandemic?

“What is one thing that stands out to you, that the supermarket you shop most often has DONE WELL during the COVID-19 pandemic?”

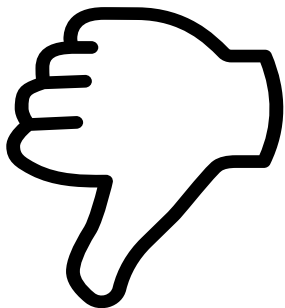
Top Responses



- Implementing Social Distancing Measures
- Providing PPE to Employees and Customers
- Cleaning & Sanitizing
- Installing Checkout Sneeze Guards
- Keeping Carts/Baskets Clean
- Limiting Number of People In Store

Primary Supermarket - What Not Done Well During Pandemic?

“What is one thing that stands out to you, that the supermarket you shop most often DID NOT DO WELL during the COVID-19 pandemic?”



Top Responses

Product Not Available/Empty Shelves
Not Providing/Requiring/Continuing Use of Masks
Not Practicing Social Distancing Measures

Primary Supermarket - Advice

“What one piece of advice would you have for this supermarket, to be better prepared in the event of a future crisis or emergency?”



Top Suggestions

1. Have Enough Product
2. Provide/Require Masks
3. Limit Purchases Immediately

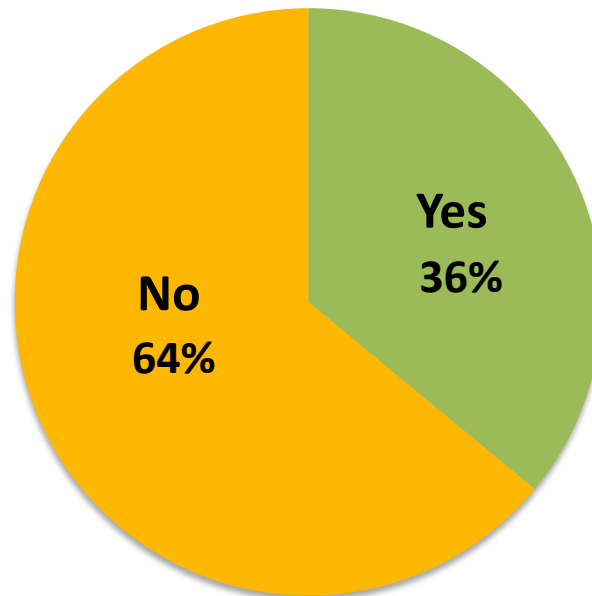


Above & Beyond Service From Supermarket Employees

“During the COVID-19 pandemic, did you experience service from a supermarket employee that went above and beyond your expectations?”



Nearly four out of ten supermarket shoppers indicated they received “above and beyond” service during the pandemic, showing strong efforts by employees these shoppers encountered despite the difficult conditions.



Effectiveness of Supermarket Safety Measures - % Highly Effective

"Please indicate how effective you think each of the following is, as it relates to improving supermarket safety during the COVID-19 pandemic."

76%

Having disinfectant
wipes available for
carts

75%

Encouraging
employees to stay
home if they felt ill

69%

Having hand
sanitizer available
throughout the
store

68%

Providing gloves
and/or masks for
employees

64%

Removing self-
serve food
stations

64%

Reducing open
hours in order
sanitize and clean
the store

62%

Installing
plexiglass barriers
at checkout lanes

Many safety measures stores took were viewed as highly effective with the top measures including disinfectant wipes available for carts, encouraging ill employees to stay home and having hand sanitizer throughout the store, as well as providing gloves and masks for employees.

59%

Discontinuing
product
demonstrations

56%

Limiting number
of people in the
store

54%

Taking employees
temp before starting
work shifts

49%

Not allowing
merchandise to be
returned

43%

Adding lines on floor or
posting signs encourage
six feet of distancing

39%

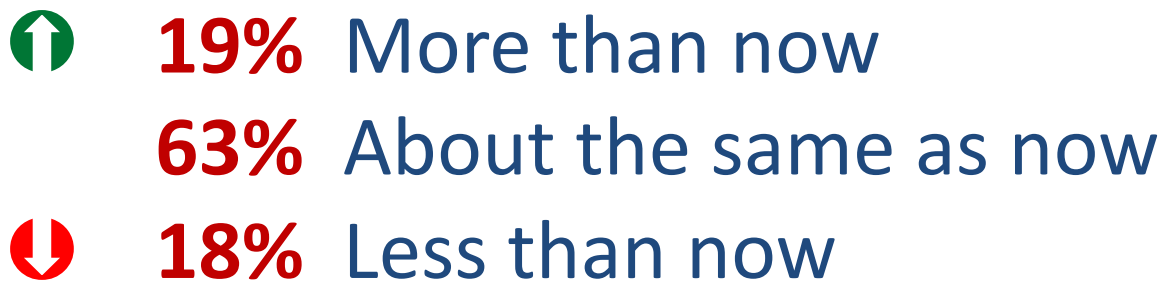
Not allowing
customers to bring in
reusable bags

35%

Using intercom/audio
announcements to remind
shoppers of social distancing
guidelines

Supermarket Shopping Frequency Next 12 Months

“In the next 12 months, how much do you expect to shop for food and groceries AT A TRADITIONAL SUPERMARKET?”



At the time of this study, the majority of shoppers anticipate shopping about the same as now at a traditional supermarket in the next twelve months (which may mean less frequency but a higher dollar spend).



OSAT and Net Promoter Score®

Overall trip satisfaction of most recent trip
(5-point scale)

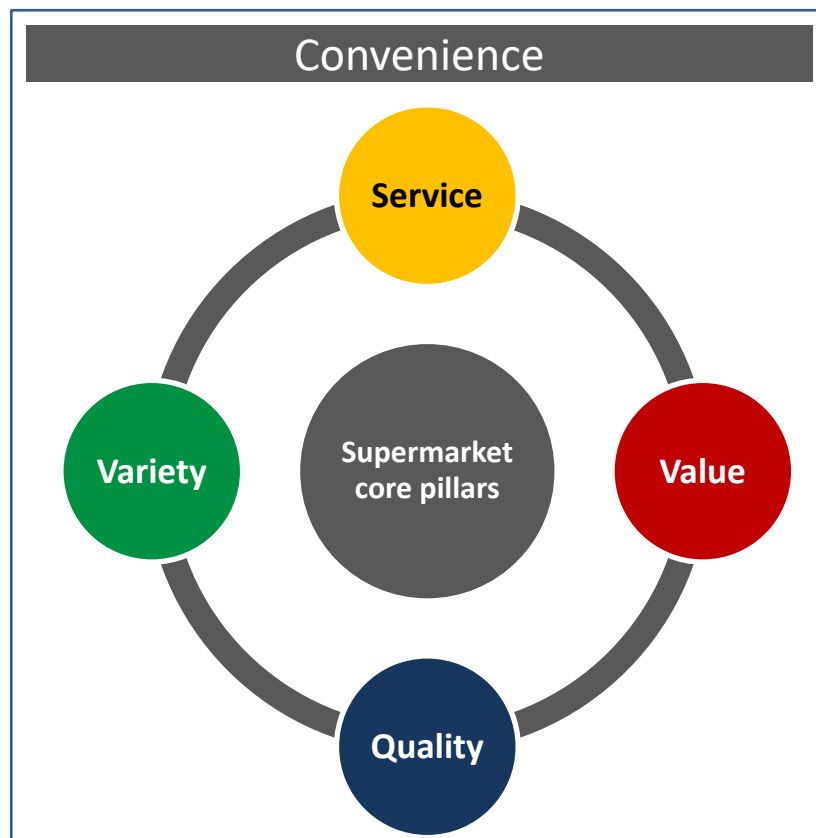
Supermarkets 2020 4.08 ⬇️
Supermarkets 2019 4.31

Likelihood to recommend
(Net Promoter Score)

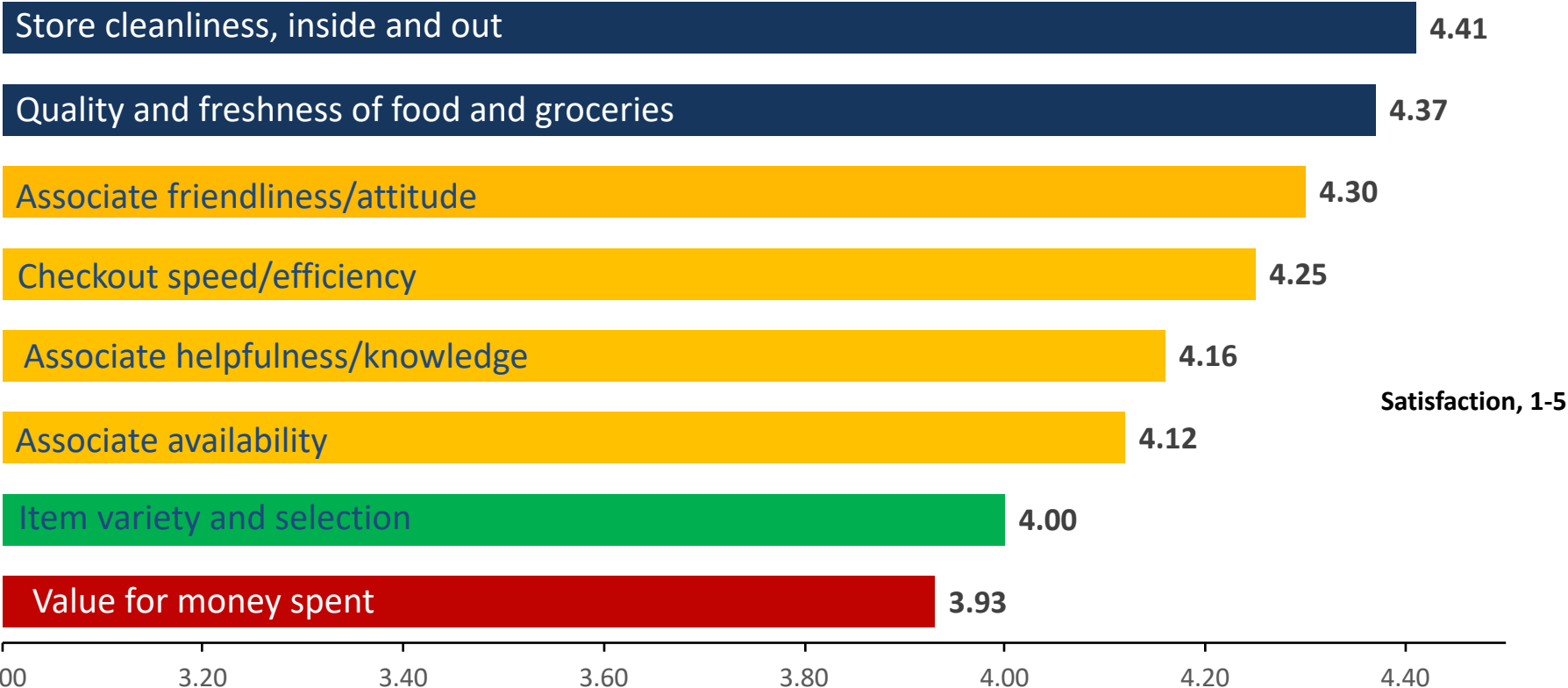
Supermarkets 2020 36.1 ⬇️
Supermarkets 2019 40.7

Both overall satisfaction and likelihood to recommend the supermarket shopped on the most recent trip dropped during the pandemic.

Core Experience Factors

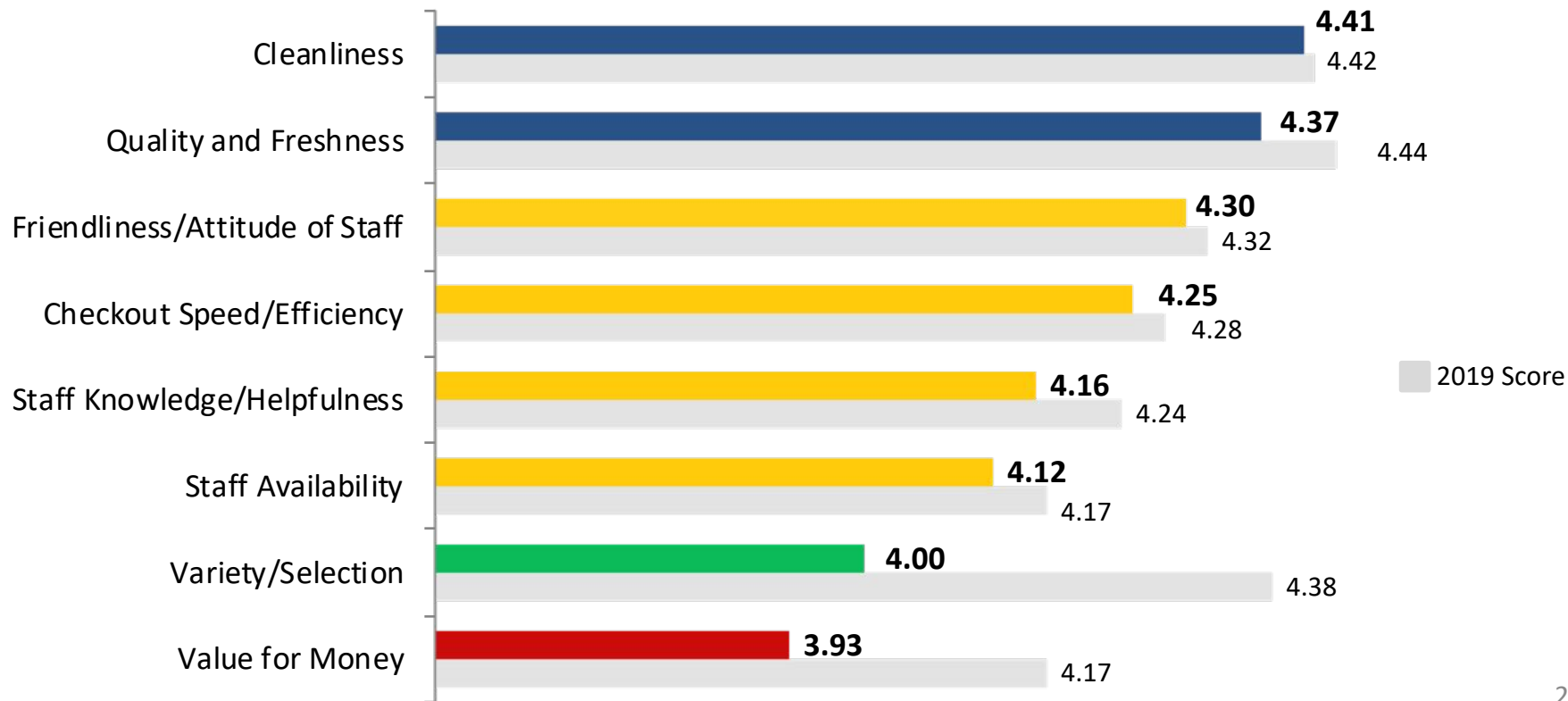


The Supermarket Pandemic Report Card: Core Experience Factors



Core Experience Factors: Year-Over-Year Change – Supermarkets

Declines In All Areas During Pandemic, Especially Variety/Selection & Value for Money Spent





Generational Differences

Older Generations Rate In-Store Experience Highest; Value For Money Spent Low Rated Factor

Satisfaction, 1-5

	Overall	Gen Z	Millennials	Gen X	Boomers	Silent
Overall trip experience (OSAT)	4.08	4.02	4.06	4.06	4.08	4.30
Store cleanliness, inside and out	4.41	4.23	4.30	4.37	4.49	4.77
Quality and freshness of food	4.37	4.34	4.25	4.33	4.42	4.69
Associate friendliness/attitude	4.30	4.04	4.19	4.28	4.40	4.61
Checkout speed/efficiency	4.25	3.83	4.18	4.22	4.38	4.51
Associate knowledge/helpfulness	4.16	4.03	4.01	4.16	4.27	4.54
Associate availability	4.12	4.04	4.02	4.10	4.17	4.44
Item variety/selection	4.00	4.00	3.91	4.00	4.01	4.25
Value for money spent	3.93	4.00	3.93	3.81	3.93	4.16

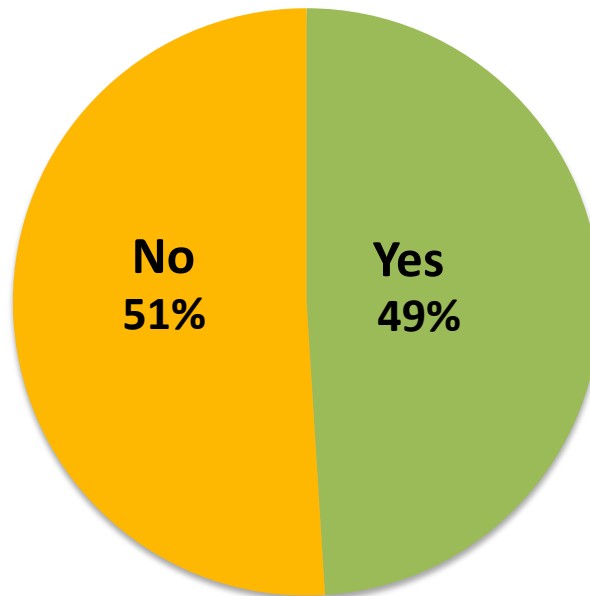
In-Stock Conditions - Items You Wanted To Purchase

“On this visit, for items that the store carries, were they in stock on everything you wanted to purchase?”

Positive In-Stock Conditions
Leads To Higher Satisfaction

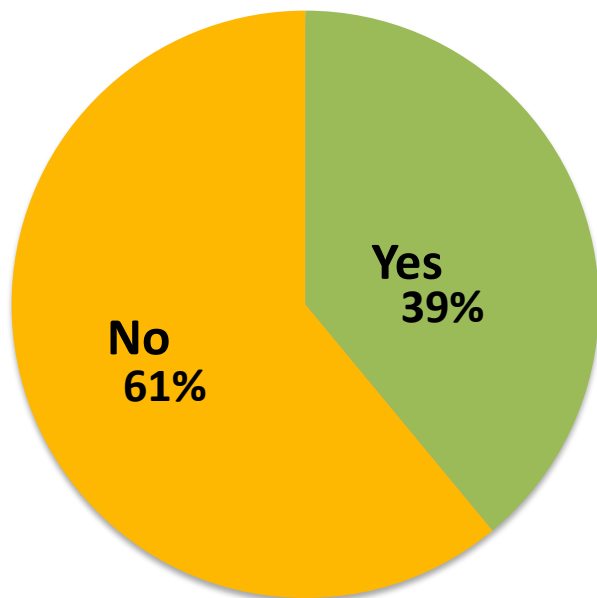
Yes 4.24 | 41% Highly satisfied

No 3.93 | 26% Highly satisfied



Employee Impact on Shopping Experience

“Did a store employee positively impact your shopping experience on this visit?”



Positive Employee Interactions
Lead To Stronger Likelihood To Recommend (NPS)

Yes 54.9 Net Promoter Score

No 24.3 Net Promoter Score

Deals Searched By Shoppers Across Traditional, Social, Mobile & Digital Media

Refer to 1+
advertising/sales vehicle
before or during the visit

2020 | 55%

2019 | 73%

The biggest drop was in reviewing the circular in-store and in-store promotions. This isn't surprising given the reduced focus on sales versus having product in stock during the pandemic and the then current guidelines that indicated touching items could spread COVID-19.



Multiple
Responses
Allowed

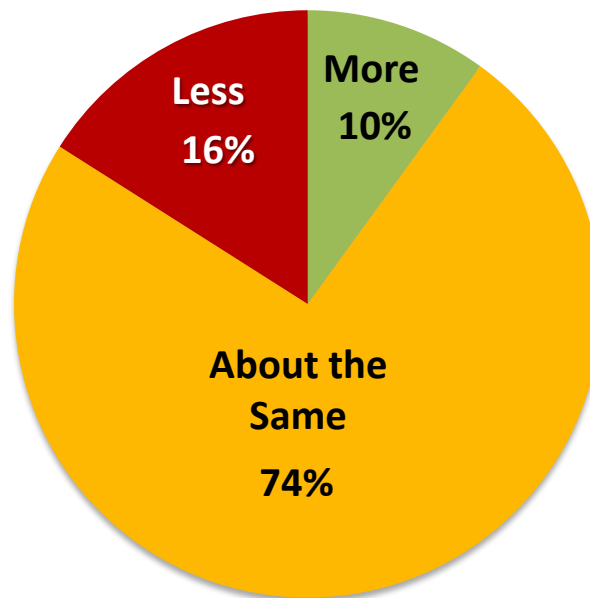
Boomers Heavier Users of Circulars, Clipped Coupons, and In-Store Promotions

Advertising/Sales Vehicles	Overall		Millennials		Gen X		Boomers	
	2020	2019	2020	2019	2020	2019	2020	2019
Printed Circular At Home	48%	51%	36%	40%	46%	45%	74%	62%
Digital Coupons	34%	33%	35%	35%	40%	35%	34%	30%
Digital Circular	28%	30%	29%	32%	22%	36%	38%	28%
Clipped Coupons	24%	29%	16%	23%	20%	29%	33%	30%
Loyalty Program Offers	17%	23%	16%	25%	22%	24%	16%	20%
Smartphone Research	17%	15%	20%	21%	21%	19%	12%	8%
In-Store Promotions	15%	23%	12%	19%	14%	27%	21%	22%
Printed Circular In-Store	14%	33%	11%	35%	14%	34%	21%	31%
Social Media Specials	6%	7%	14%	12%	3%	6%	2%	3%

Use of Paper Circulars in Next 12 Months

“In the next 12 months, how much do you expect to use paper circulars to review a store's advertised specials?”

The vast majority of shoppers expect to use paper circulars to review a store's advertised specials “about the same” in the next 12 months.



In-Store Shoppers: Plan To Try Online Shopping In Next 30 Days

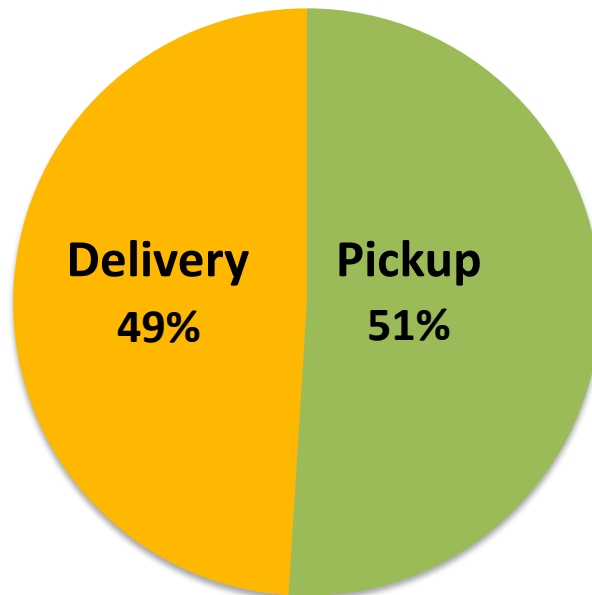
“You indicated earlier that you have NOT tried shopping online for food or groceries in the last 30 days. Do you plan to try shopping online for food and groceries in the next 30 days?”

YES 16%

Plan to Pick Up
or Have Delivered?



NO 84%



In-store shoppers who have not already tried online shopping during the pandemic mostly don't plan to do so. Among those who do plan to try it, about half plan to try pickup and the other half delivery.

A blurred background image showing a hand typing on a laptop keyboard.

ONLINE SHOPPER RESULTS

First Time Online Shopping?

“Was this the first time you had shopped ONLINE, with any store/provider, for food and grocery items?”

YES 36%



NO 64%

About a third of shoppers who indicated their most recent shopping experience was online also said it was their first time shopping online for food and grocery items.

Use of Different Online Grocery Service Providers - Last Three Months

“Including your recent use of this service, how many different online grocery service providers did you shop with or try in the last three months?”



While 38% of shoppers used one online grocery provider, 62% used two or more providers in the last three months, during the pandemic. This suggests many shoppers were trying multiple services to see who could best meet their needs.

Expect To Purchase Groceries Online In Next Twelve Months

“In the next 12 months, how much do you expect to purchase grocery items online?”

2018 **2019** **2020**


49% **41%** **46%**

 Indicated “More Often”

48% **54%** **37%**

Indicated “About the Same”

3% **4%** **17%**

 Selected “Less Often”


Some shoppers who may have been purchasing online during the pandemic don’t expect to continue, based on the high percentage (17%) indicating “less often” in 2020 when looking out over the next twelve months.

Pickup Orders Continue to Rise, As Does Instacart Fulfillment

“How was your online order fulfilled?”


Pickup




2020	51% 
2019	47%
2018	43%

Delivery



49% 
53%
57%

% of Orders/Deliveries Handled by Instacart

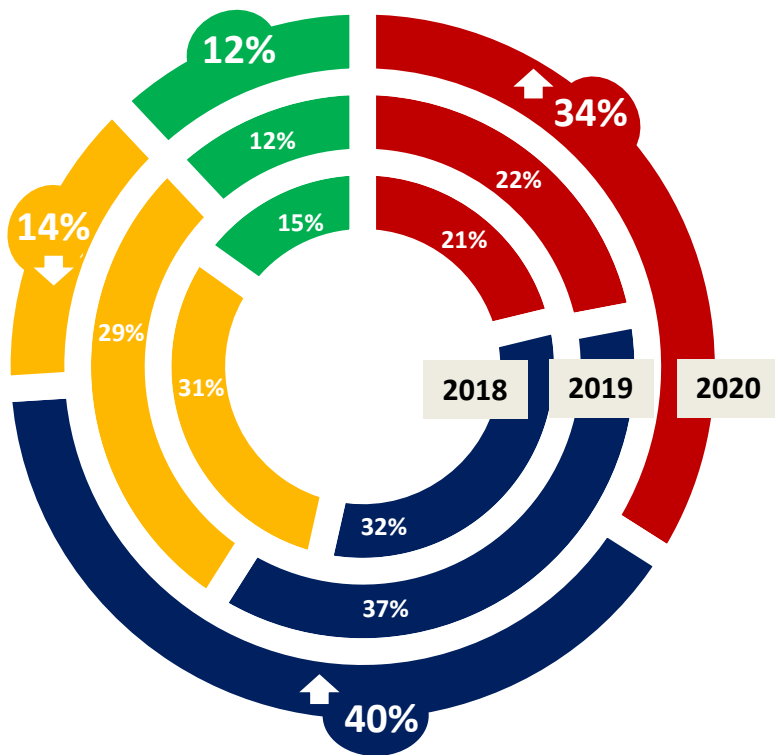
2020	36% 
2019	27%

“Was your online order or delivery
handled by Instacart?”

Online Grocery Shopping Services: Share of Survey Respondents 2018-2020

“Which online grocery store/service did you most recently use [in the last 30 days]?”

- Supermarkets
- Walmart
- Amazon
- All Others



During the pandemic, supermarkets surged in online shopping use (+12%), while Amazon dropped (-15%) and Walmart increased slightly (+3%).

Planning To Purchase Online in the Next 12 Months By Major Segment

“In the coming year, how often do you expect to purchase grocery items online?”

More



About the Same

Less



2019

2020

2019

2020

2019

2020

Amazon Shoppers

37%

52%



59%

35%



5%

13%



Walmart Shoppers

47%

46%

50%

38%



3%

16%



Supermarket Shoppers

41%

44%

54%

36%



5%

20%

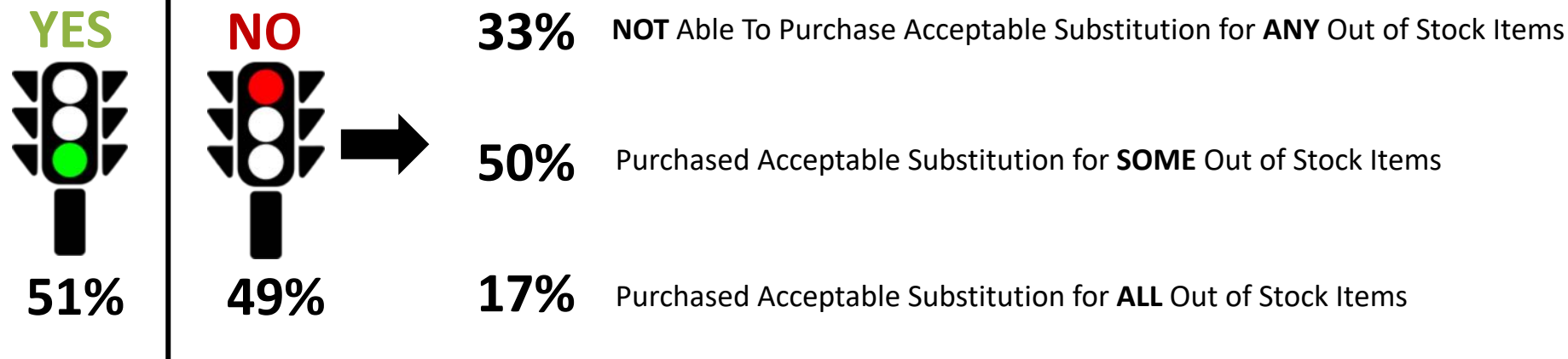


In-Stock Conditions

Items You Wanted To Purchase/Substitutions

“On this visit, for items that the service carries, were they in stock on everything you wanted to purchase?”

“How were substitutions handled for out of stock items?”

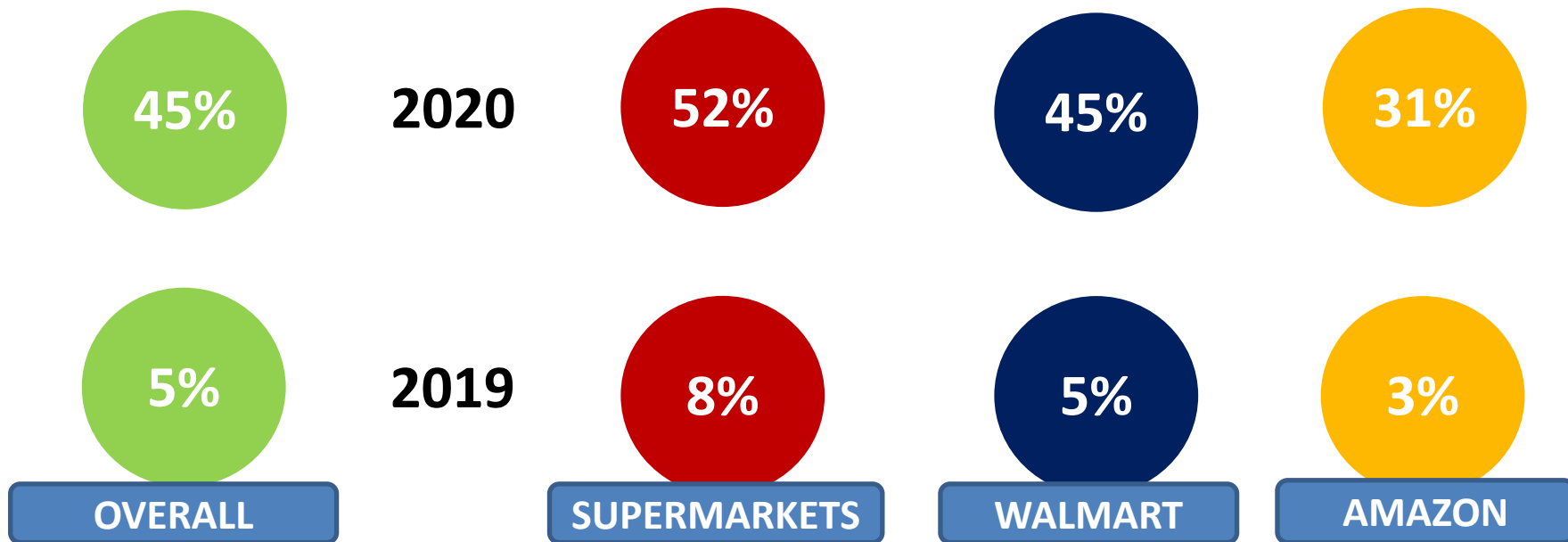


Half of shoppers indicated the online service was not in stock on everything that they wanted to purchase. Further, only 17% were able to purchase an acceptable substitution for ALL out of stock items.

Received All Items Ordered - Percent Indicating “NO” During Pandemic

“Did you wind up receiving all the items you ordered (or an acceptable substitute)?”

Nearly half (45%) of all shoppers indicated they did not receive all items ordered, or an acceptable substitution. Supermarkets recorded the highest percentage at 52%, while Walmart was at 45% and Amazon at 31%. Note that these numbers were massively higher given the pandemic as compared to last year’s numbers.



The Online Grocery Satisfaction Path

MEAN RATINGS



Supermarkets



Amazon



Walmart



Instacart Fulfilled Subset



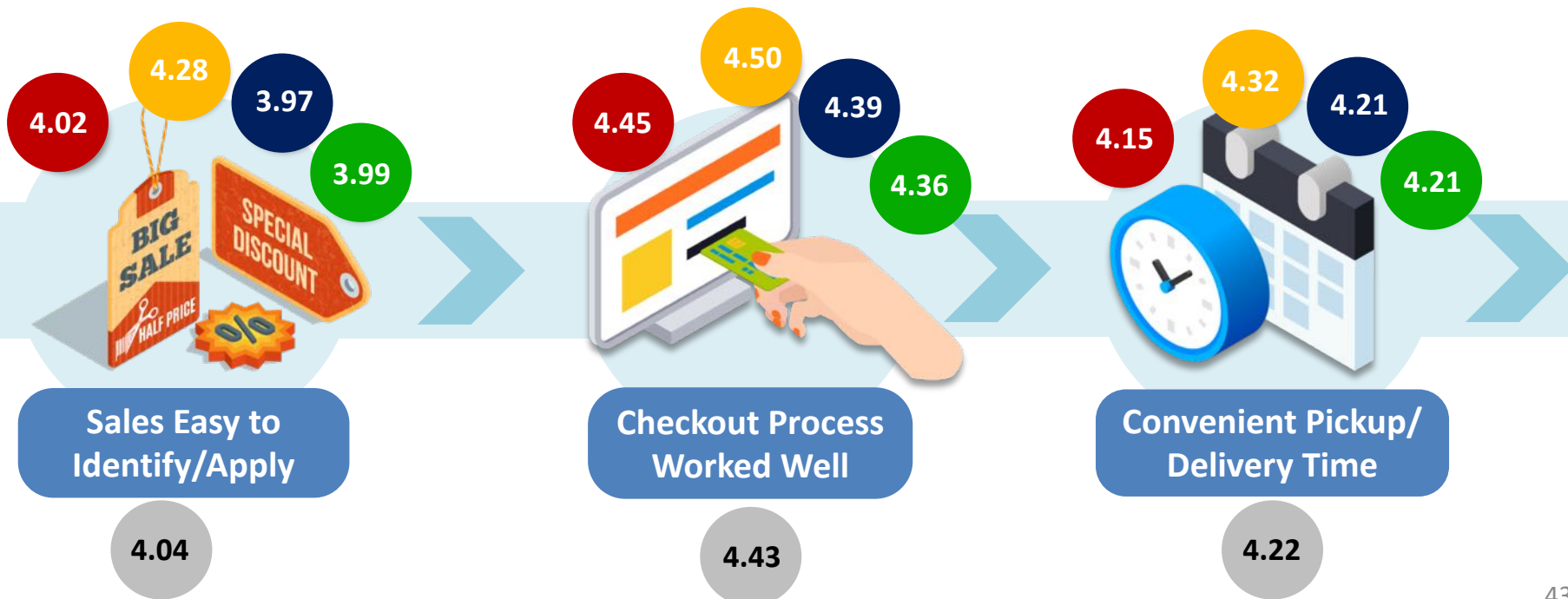
Overall



The Online Grocery Satisfaction Path

MEAN RATINGS

- Supermarkets
- Amazon
- Walmart
- Instacart Fulfilled Subset
- Overall



The Online Grocery Satisfaction Path

MEAN RATINGS

- Supermarkets
- Amazon
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The Online Grocery Satisfaction Path

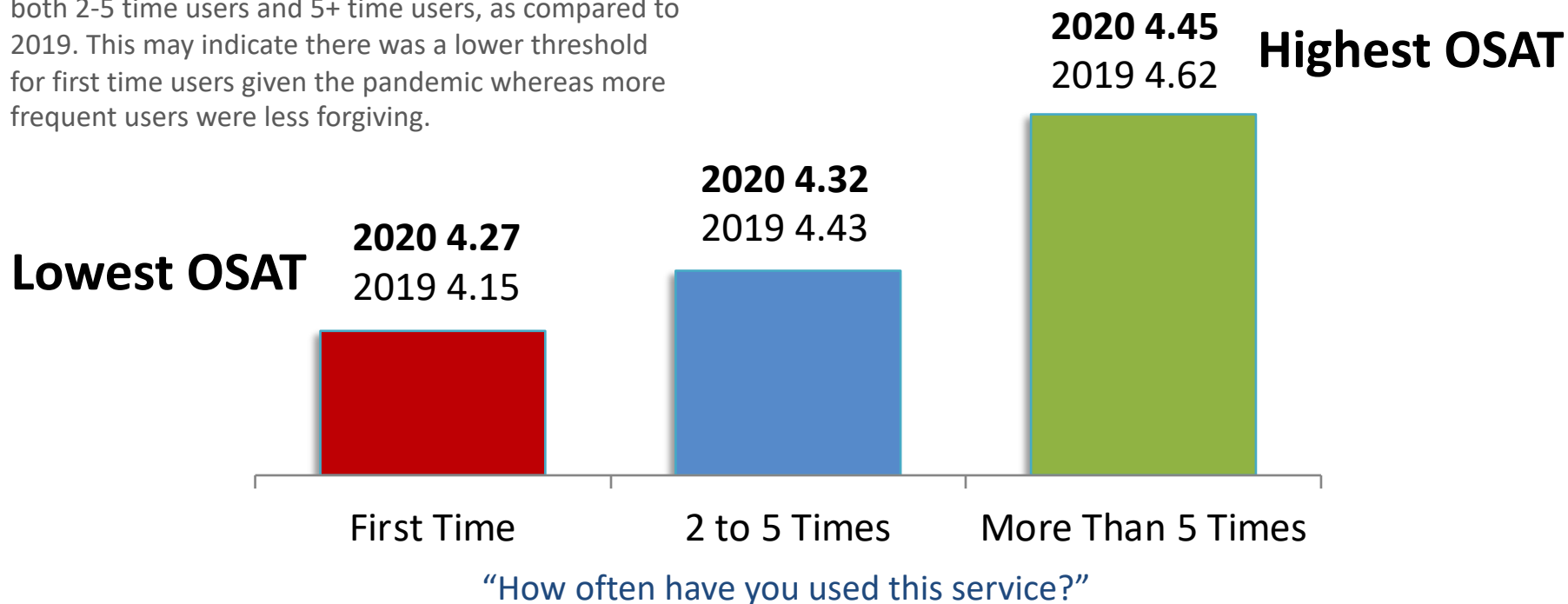
MEAN RATINGS

- Supermarkets
- Amazon
- Walmart
- Instacart Fulfilled Subset
- Overall



Overall Satisfaction & Frequency Of Use of Online Shopping Service

OSAT increased for first time users (compared to last year but was still lowest) and it declined sharply for both 2-5 time users and 5+ time users, as compared to 2019. This may indicate there was a lower threshold for first time users given the pandemic whereas more frequent users were less forgiving.

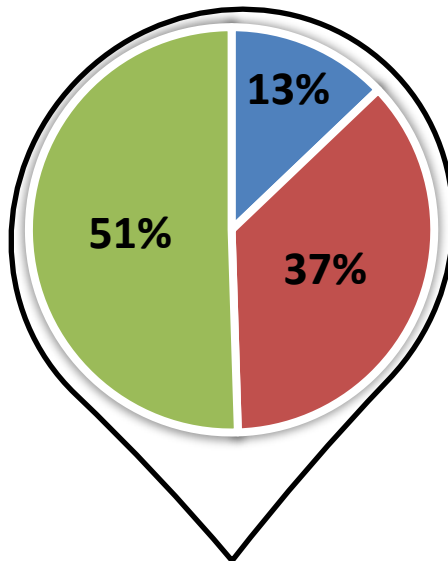
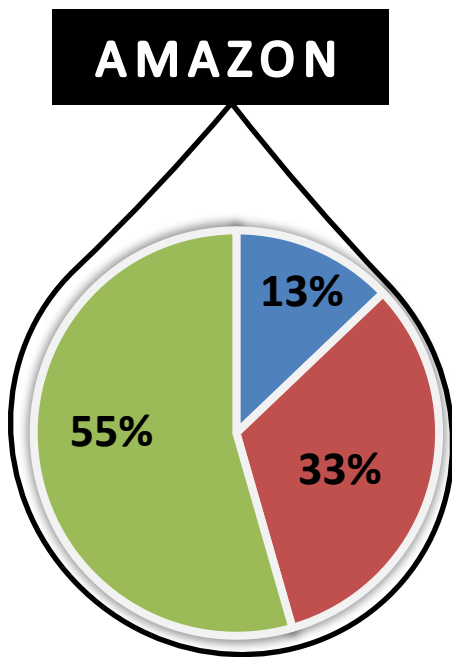




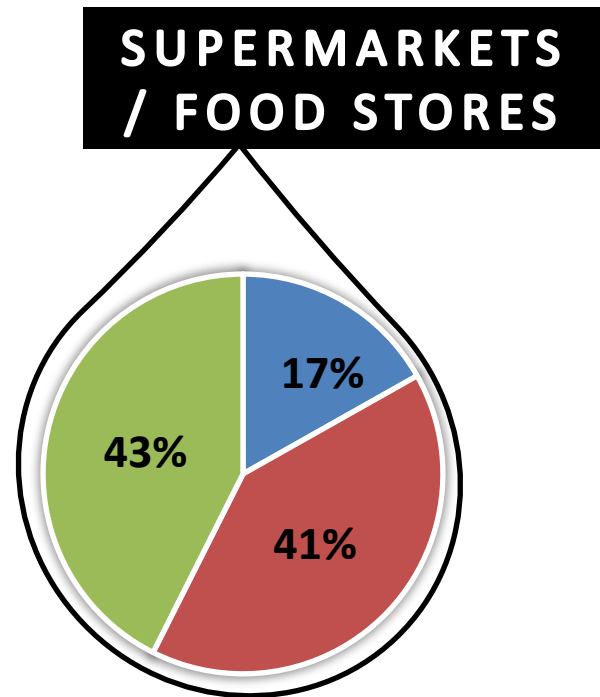
FINDINGS BY MAJOR SEGMENT

Supermarkets Show Highest Percentage of First Time Users

“How often have you used this service?”



WALMART



Frequency of Use

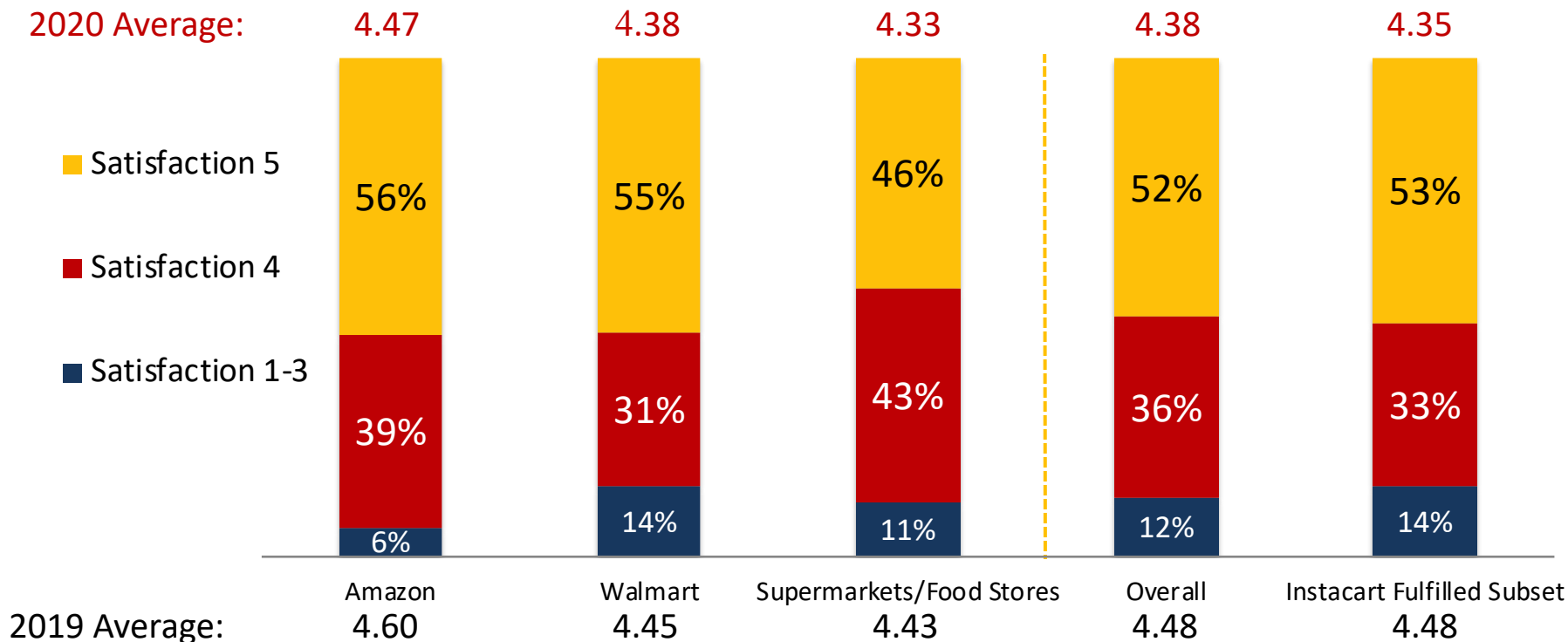
First Time

2 to 5
Times

More Than 5
Times

Overall Satisfaction Drops Across All Retailers Measured And Among Instacart Fulfilled Subset

“Please rate your OVERALL satisfaction with this experience using this service (on 5-point scale)”



Elements of Online Shopping Experience

Ordering Factors – % Strongly Agree – by Provider

“Please rate each of the following statements as it relates to your most recent use of this service.”

	Overall	Amazon	Walmart	Supermarkets / Food Stores	Instacart Fulfilled Subset
The online checkout process worked well and without problems.	60%	64%	58%	60%	57%
The website/app worked smoothly during the whole order process.	51%	60%	49%	50%	49%
It was easy to navigate through the site/app to locate the items I wanted.	47%	57%	48%	43%	41%
The items I wanted to buy were in-stock on the shopping website.	26%	39%	26%	21%	29%
It was easy to identify sale or special prices and have those discounts applied during checkout.	42%	49%	38%	42%	40%

Elements of Online Shopping Experience

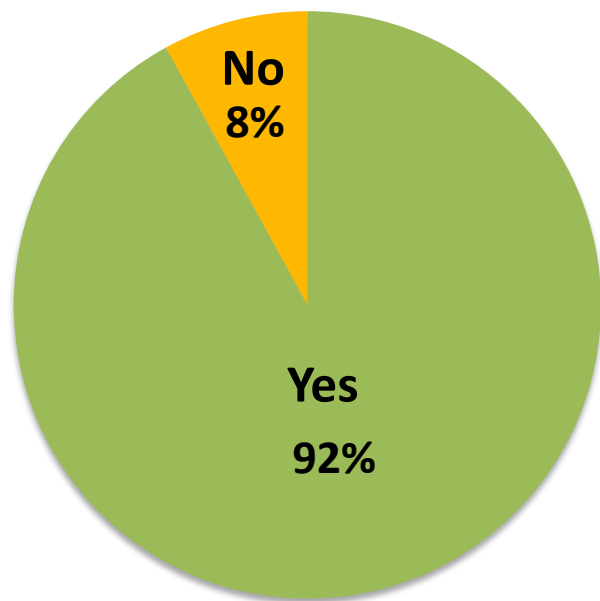
Fulfillment Factors – % Strongly Agree – by Provider

“Please rate each of the following statements as it relates to your most recent use of this service.”

	Overall	Amazon	Walmart	Supermarkets / Food Stores	Instacart Fulfilled Subset
The order pickup or delivery process was prompt and efficient.	55%	59%	55%	52%	48%
There was an available pickup or delivery time that was convenient for me.	51%	57%	51%	47%	52%
The items I received were packaged well.	55%	62%	51%	55%	48%
The items I received met my standards for quality and freshness.	52%	55%	51%	49%	48%
Overall I received good value for the money I paid for this order.	45%	44%	50%	40%	45%

Order Delivered In Time Window Selected?

“Was your order delivered in the time window you selected? (among shoppers fulfilled by delivery)”



Once shoppers were able to obtain a delivery window, the vast majority indicated that their order was delivered in that window.

Interaction With Staff

“Did you have any interaction with any of the following staff during the course of your most recent online shopping experience? If yes, rate the following.”

	Average (5-point agreement scale)
PERSONAL SHOPPER	
The personal shopper was friendly.	4.50
The personal shopper was helpful/knowledgeable.	4.43
STORE STAFF	
The store staff was friendly.	4.44
The store staff was helpful/knowledgeable.	4.37
DELIVERY DRIVER	
The delivery driver was friendly.	4.63
The delivery driver was helpful/knowledgeable.	4.47

Perceived service was reasonably strong, with higher marks given for friendliness than helpfulness.

Primary Online Store Or Service - What Done Well During Pandemic?

“Now thinking about the online shopping site or service you use most often, what is one thing that stands out to you, that they have DONE WELL during the COVID-19 pandemic?”

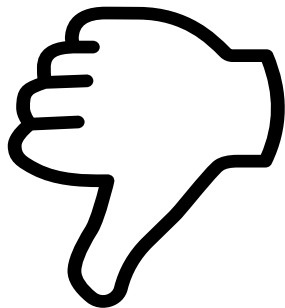


Top Responses

Product Availability
Good Customer Service
Contactless Delivery/Pick-Up
Efficient/Fast

Primary Online Store Or Service - What Not Done Well During Pandemic?

“What is one thing that stands out to you, that the online shopping site/service you use most often DID NOT DO WELL during the COVID-19 pandemic?”



Top Responses

Limited Product Availability / Out of Stocks
Delivery/Pick-Up Slots Difficult To Get

Primary Online Store Or Service - Advice

“What one piece of advice would you have for this online shopping site/service, to be better prepared in the event of a future crisis or emergency?”



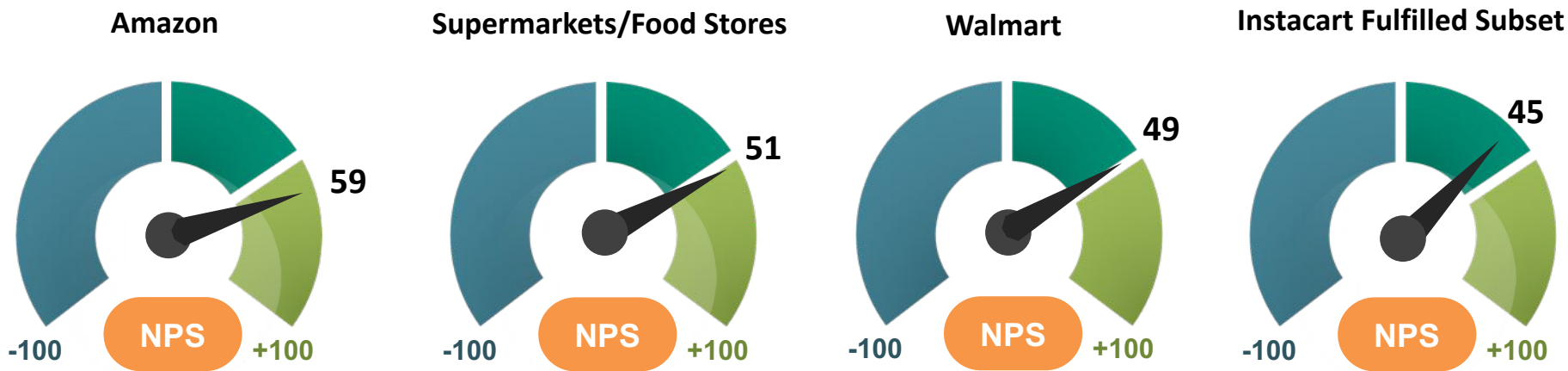
Top Suggestions

1. Better Product Availability
2. Need More Delivery/Pick-Up Slots
3. Need More Staff



“On a scale of 0 (lowest) to 10 (highest), how likely are you to recommend this service as a place to shop for food and groceries?”

Overall 2020 Net Promoter Score = 51 (compared to 55 in 2019)



Net Promoter Score was highest for Amazon at 59 (up from 54 last year), followed by Supermarkets at 51 (down from 57 in 2019) and Walmart at 49 (down from 54 last year). Shoppers with Instacart fulfilled orders gave the lowest Net Promoter Scores of 45 (a significant decline from the NPS of 64 in 2019).



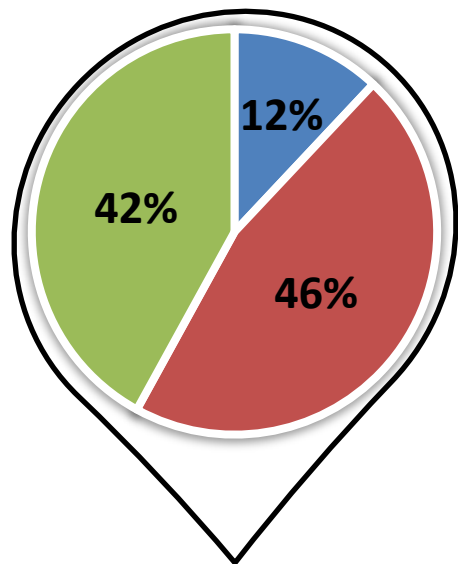
FINDINGS BY KEY GENERATIONS



Frequency of Use of Online Shopping By Generation

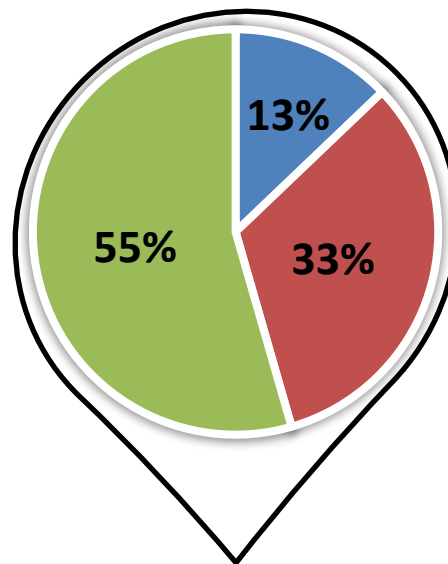
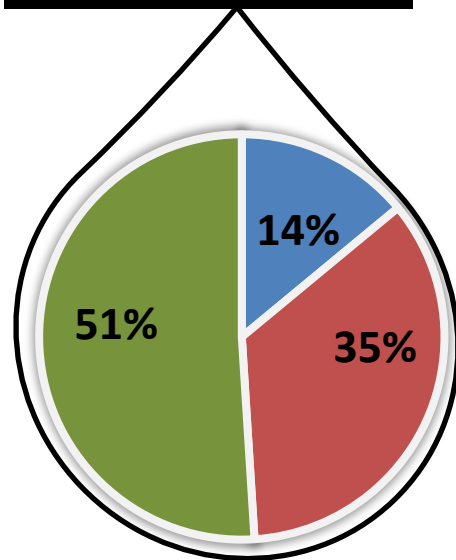
"How often have you used this service?"

First Time

2 to 5
TimesMore Than 5
Times

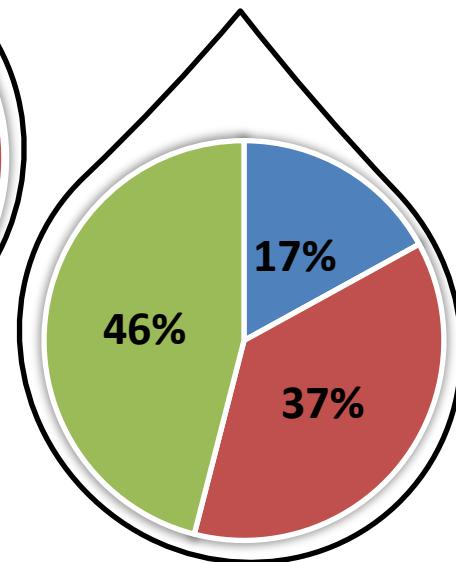
GEN Z

MILLENNIAL



GEN X

BOOMER



Overall Satisfaction With Online Food Shopping Drops; Satisfaction Increases With Age

“Please rate your OVERALL satisfaction with this experience using this service (on 5-point scale)”

2020 Average:

4.22

4.33

4.35

4.43

4.38

■ Satisfaction 5

46%

49%

53%

55%

52%

■ Satisfaction 4

36%

38%

33%

35%

36%

■ Satisfaction 1-3

18%

14%

15%

10%

12%

Gen Z
NA

Millennial
4.45

Gen X
4.48

Boomer
4.56

Overall Online Shopping
4.48

2019 Average:

Elements of Online Shopping Experience

Ordering Factors – % Strongly Agree – by Generation

“Please rate each of the following statements as it relates to your most recent use of this service.”

	Overall	Gen Z	Millennial	Gen X	Boomer
The online checkout process worked well and without problems.	60%	48%	55%	56%	69%
The website/app worked smoothly during the whole order process.	51%	41%	47%	51%	57%
It was easy to navigate through the site/app to locate the items I wanted.	47%	41%	42%	47%	51%
The items I wanted to buy were available on the shopping website.	26%	24%	26%	31%	22%
It was easy to identify sale or special prices and have those discounts applied during checkout.	42%	37%	40%	42%	44%

Elements of Online Shopping Experience











Fulfillment Factors – % Strongly Agree – by Generation

“Please rate each of the following statements as it relates to your most recent use of this service.”

	Overall	Gen Z	Millennial	Gen X	Boomer
The order pickup or delivery process was prompt and efficient.	55%	52%	46%	50%	68%
There was an available pickup or delivery time that was convenient for me.	51%	49%	42%	55%	57%
The items I received were packaged well.	55%	48%	49%	49%	64%
The items I received met my standards for quality and freshness.	52%	48%	44%	47%	63%
Overall I received good value for the money I paid for this order.	45%	41%	46%	41%	46%

Some Shoppers Looking At Purchasing More Often In Coming Year While Others Planning To Shift To Less Online Shopping Post-Pandemic

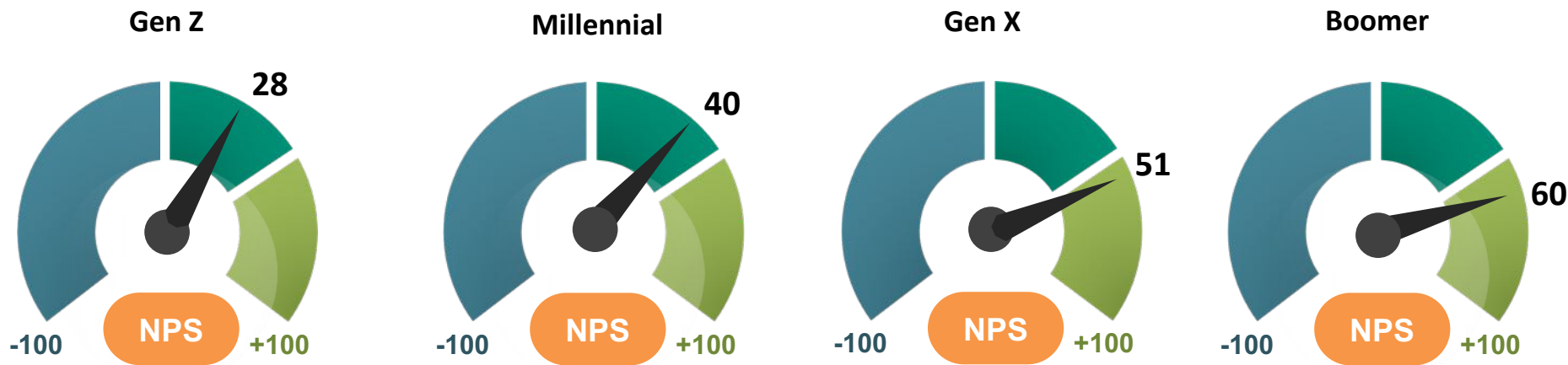
“In the coming year, how often do you expect to purchase grocery items online?”

	More 		About the Same		Less 	
	2019	2020	2019	2020	2019	2020
Gen Z Shoppers	NA	35%	NA	38%	NA	27%
Millennial Shoppers	48%	54% 	48%	33% 	4%	13% 
Gen X Shoppers	43%	53% 	54%	36% 	3%	12% 
Boomer Shoppers	38%	41%	59%	42% 	3%	17% 

Net Promoter Scores For Major Generations

“On a scale of 0 (lowest) to 10 (highest), how likely are you to recommend this service as a place to shop for food and groceries?”

Overall 2020 Net Promoter Score = 51 (compared to 55 in 2019)



Net Promoter Score was highest for Boomers at 60 (down from 65 last year), followed by Gen X at 51 (similar to 52 in 2019) and Millennials at 40 (down from 51 last year). Gen Z shoppers, included this year for the first time, registered the lowest NPS of 28.



Contact RFG For More Information



Brian Numainville, Principal

bn@retailfeedback.com

T. 516.829.4200 ext. 115



Doug Madenberg, Principal

dm@retailfeedback.com

T. 516.829.4200 ext. 111

CONNECT WITH US

Website: retailfeedback.com

Twitter: [@thefeedbackgrp](https://twitter.com/thefeedbackgrp)

LinkedIn: [The Retail Feedback Group](https://www.linkedin.com/company/the-retail-feedback-group)