IN MARKET INSIGHTS

COVID-19:
Behaviors Before &
After Impact Report

Overview

In our previous COVID-19: Behaviors Before & After Report, we examined how the pandemic had impacted consumer feelings and perceptions about the economy as well as where they shop and what they buy. In this update, we've conducted a follow-up survey to gauge how attitudes have shifted from June and March 2020. Overall, the average consumer's opinion continues to evolve over time. In fact, consumers seem to be more optimistic about the future, and more willing to make in-person shopping and dining trips.

How We Did It

We surveyed a sample of over 2,000 U.S. based consumers collected from our first-party, permission-based SDK platform of Comscore-verified monthly active app users during August 2020. Participants were asked about their opinions, intent, and shopping behaviors during the COVID-19 pandemic. The survey focused on users' expectations around the pandemic's effect on the economy, in-store and online visits, and item purchases.

For more information about methodology or additional real-world recommendations around appropriate targeting, channel, content, and messaging strategies and tactics, visit InMarket's COVID-19 InSights Center or contact your InMarket representative.

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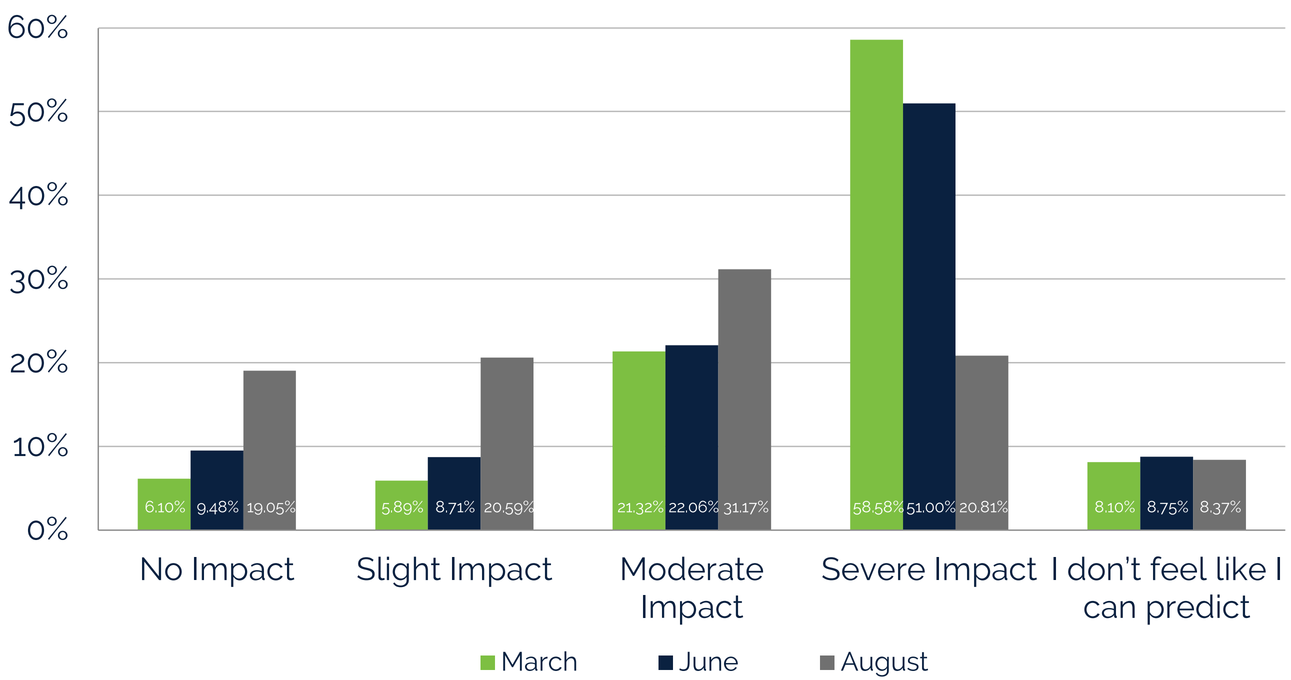
Consumer Opinions on the Pandemic

In order to gain an understanding of consumers' behaviors and feelings as a result of the pandemic, we asked the sample group of app users about their attitudes on what the pandemic's impact on the economy would be.

What kind of impact do you think the pandemic will have on the economy?



Overall, attitudes about the economy are increasingly more optimistic. While 58.58% of those surveyed in March felt that the pandemic would severely impact the economy, just 20.81% now hold the same sentiment in August. A majority of people surveyed in August (31.17%) felt that the economy will be moderately impacted by COVID-19 — implying that as states have undergone progressing stages of reopening, consumers are coming to terms with and adapting to their new normal.

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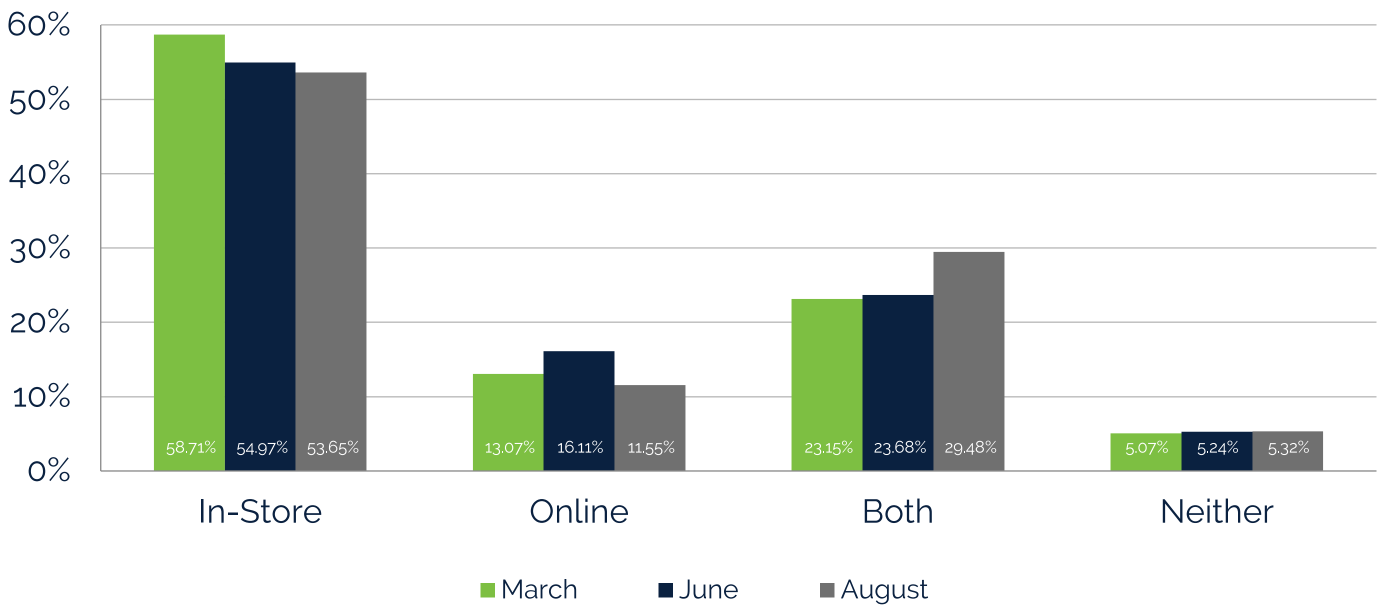
In-Store vs. Online Visits Before and After

To get a better understanding of how shopping behaviors have changed during the pandemic, we asked consumers to share their activities to identify key changes in their intent and attitudes since March 2020.

Visited Grocery Store



While a majority of shoppers have been visiting stores in-person regardless of time period, more people in August (29.48%) have been using a combination of in-store and online shopping than in June (23.69%) or March (23.15%). While June saw the highest share (16.11%) of exclusively online shopping, this trend is slowing, and a hybrid of in-store and online shopping is becoming more popular.

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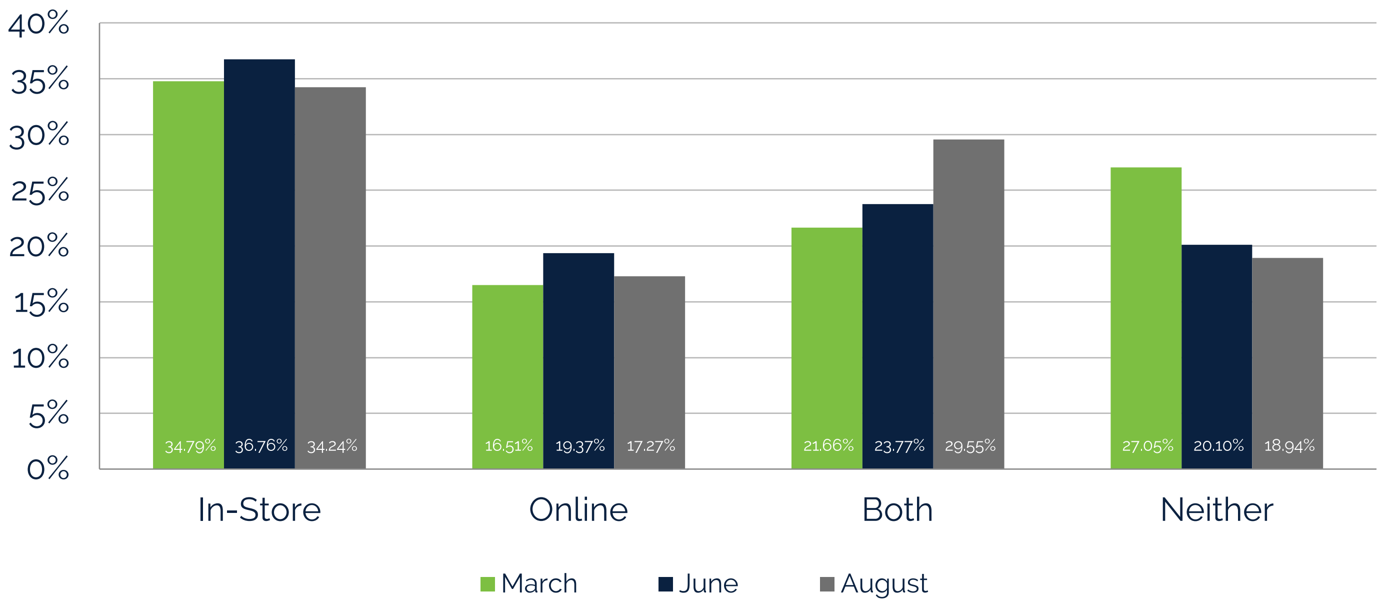
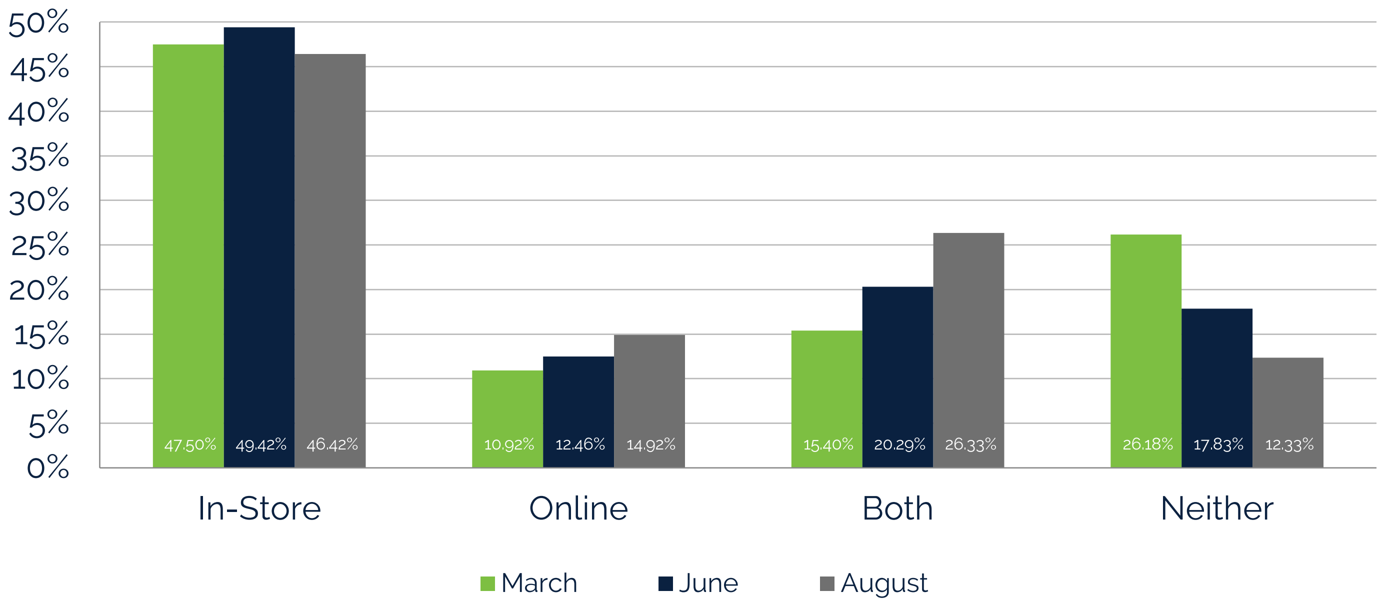
Visited Big Box Retailers



While a majority of those surveyed said their big box shopping is happening exclusively in-stores, August saw the largest growth in both in-store and online shopping at 29.55%. Similar to grocery, shoppers are embracing a hybrid shopping experience. This is likely an indication that supply chains that had been largely interrupted in March have now since recovered. However, with more flexible shopping options, consumers are exercising both methods more than ever before.

Visited Drug Stores / Pharmacies



A large majority of drug store/pharmacy shopping is still happening in-stores among those surveyed, but August (26.33%) had the biggest share of hybrid shopping compared to March and June.

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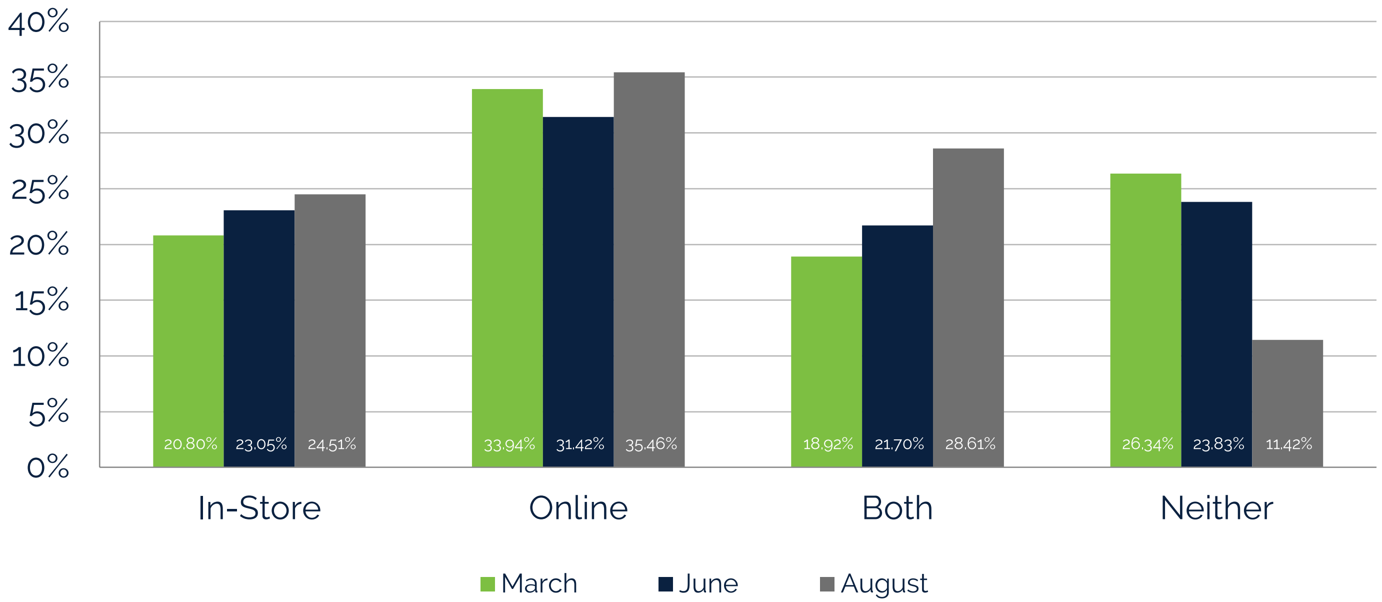
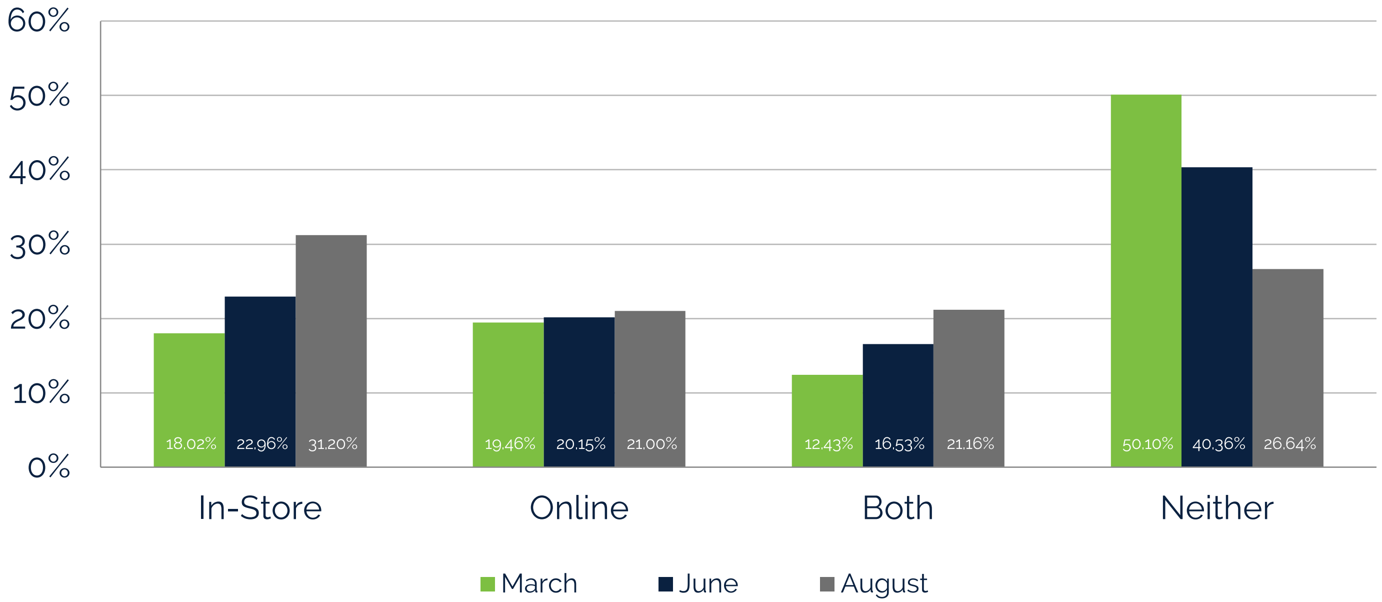
Visited a Bank



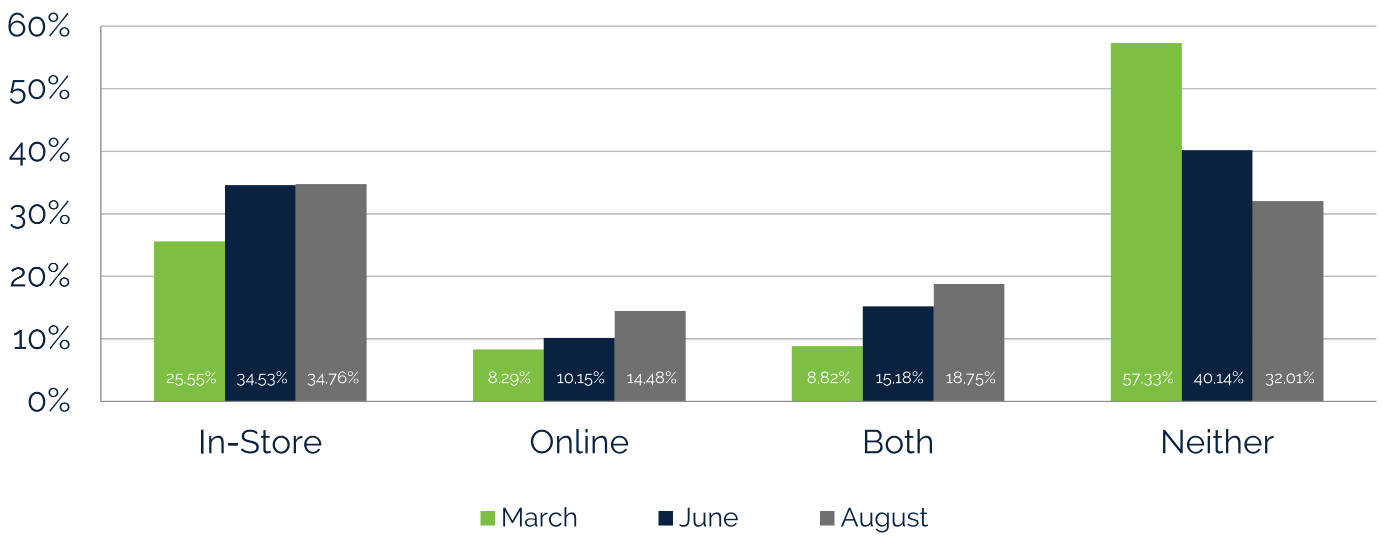
Among those surveyed, a majority of banking is still occurring online regardless of time period. There has been an increase in in-person banking (24.51%) as well as doing a combination of both online and physical (28.61%) visits in August.

Visited Sit-Down or Fast Food Restaurants



A majority of those surveyed were still avoiding restaurants in March (50.10%) and in June (40.36%), but hungry consumers seem to be making more in-person visits in August (31.20%) than in previous months. With many restaurants reopening with a variety of approaches including outdoor seating, limited seating capacity, and implementing mask policies, and other requirements, more, people seem to be more comfortable dining in. Additionally, there's an upward trend of consumers making both in-restaurant and online visits for meals in August (21.16%).

Visited Hardware Stores



Hardware stores seem to be experiencing an increase in both in-store and online visits in August (18.75%). However, among those surveyed, a majority of hardware shopping in August is still occurring in person (34.76%).

In-Store vs. Online Purchase—June vs. August 2020

We asked users how they purchased different items in June, and asked the same question again in August. We then calculated the difference between the two answers to assess if there was a change in where individual items were purchased: in-store, online, both, or neither.

	In-Store	Online	Both	Neither
Toilet Paper	1.64%	0.68%	0.06%	-2.36%
Paper Towels	0.84%	1.31%	0.30%	-2.46%
Hand Sanitizer	5.94%	2.56%	0.07%	-8.58%
Cleaning Products	1.53%	2.56%	0.91%	-5.01%
Milk	-0.31%	0.54%	-0.97%	0.73%
Eggs	3.38%	-1.12%	-1.95%	-0.31%
Produce	1.53%	-0.45%	-0.76%	-0.33%
Frozen Food	1.79%	-0.49%	-1.07%	-0.23%
Canned Goods	-0.39%	0.58%	-1.86%	1.67%
Pasta	-1.13%	0.75%	0.73%	-0.36%
Rice	0.67%	0.37%	0.34%	-1.38%
Pasta Sauce	1.63%	0.27%	0.59%	-2.50%
Desserts	1.75%	0.32%	0.55%	-2.62%
Wine	2.09%	1.15%	-0.64%	-2.61%
Beer	6.86%	-0.24%	0.25%	-6.89%
Spirits	1.98%	0.91%	-1.12%	-1.78%
Electronics	0.91%	4.56%	1.86%	-7.34%
Power Tools	-0.51%	0.93%	-0.12%	-0.28%
Gardening Product	-2.56%	0.07%	-1.03%	3.51%

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- Consumers were more willing to purchase beer (6.86%) and hand sanitizer (5.94%) in-store in August than in June. The increased purchasing of beer in bulk and increased availability of hand sanitizer may have contributed to this increase.
- There was an overall average increase in purchasing products in-store in August (1.45%) than in June (0.93%).
- Consumers were more comfortable purchasing perishable staples—such as eggs (3.38%), produce (1.53%), and frozen foods (1.79%)—in-stores than exclusively online or via multi-channel methods.
- Consumers were more willing to purchase electronics exclusively online (4.56%) than in-store (0.91%) or via multi-channel methods (1.86%).
- Consumers were less willing to purchase gardening products in general (3.51%). Gardening products seem to be falling out of favor as most projects are likely now completed, and the season is nearly over for vegetable and flower gardening. Additionally, gardening products may have already been purchased early on during the pandemic—eliminating the need to buy again.