provoke
insights

Retail: In-Store & eCommerce

June, 2020

Background & Objectives

Over the last three months, daily habits and routines have been uprooted. The impact that these shifting behaviors are going to have is unknown, so far. As we enter the post COVID world, consumers will have new brand expectations. The question is, will current patterns and practices become permanent?

Provoke Insights works in a variety of industries, from technology and finance to food and luxury – the firm decided to launch a research initiative to understand the effects that the first half of 2020 has had on the consumer.

The goal of the research was to gain a national perspective on the mindset of consumers and what changes they have made in their behavior. The study covered over 15 industries and surveyed general consumers as well as professionals.

The objectives of the research include:

1. Understanding consumer behavior pre-, during, and post-COVID-19.
2. Gaining feedback on shifting mindset/attitudes from March 2020 to when restrictions are lifted.

Methodology

Provoke Insights conducted a 10-minute survey among 600 U.S. consumers between the ages of 21 and 65. The study was in-field from June 5th to June 15th, 2020.

Sampling was matched to reflect 2019 U.S. Census data[1]. A random stratified sample methodology was used to ensure a high degree of representation of the U.S. population (household income, age, gender, geography, and children in the household).

Statistical differences between subgroups were tested at a 95% confidence level.

1 https://data.census.gov/cedsci/table?t=Income%20and%20Poverty&tid=ACSST1Y2018.S1701&hidePreview=false&vintage=2018

Overview

In-Store Shopping

Almost a fifth of Americans (17%) are most excited about going back to shopping in-store when restrictions are lifted. However, over half are still concerned about the impact that COVID-19 will have on the retail industry.

Given the apprehension that Americans have about brick and mortar retail – the tradition of in-store browsing will not return to 'normal' once restrictions are lifted. Half of consumers plan to shop in-store less or not at all compared to before the global pandemic. Over a quarter of consumers are interested in scheduling appointments for private shopping, and a quarter are interested in virtual shopping events.

Online Shopping

Online shopping has taken over the retail space, as 78% of Americans say that the internet has taken the hassle out of shopping.
Nearly half of Americans are now using online to buy groceries, personal care items for adults, and alcohol.

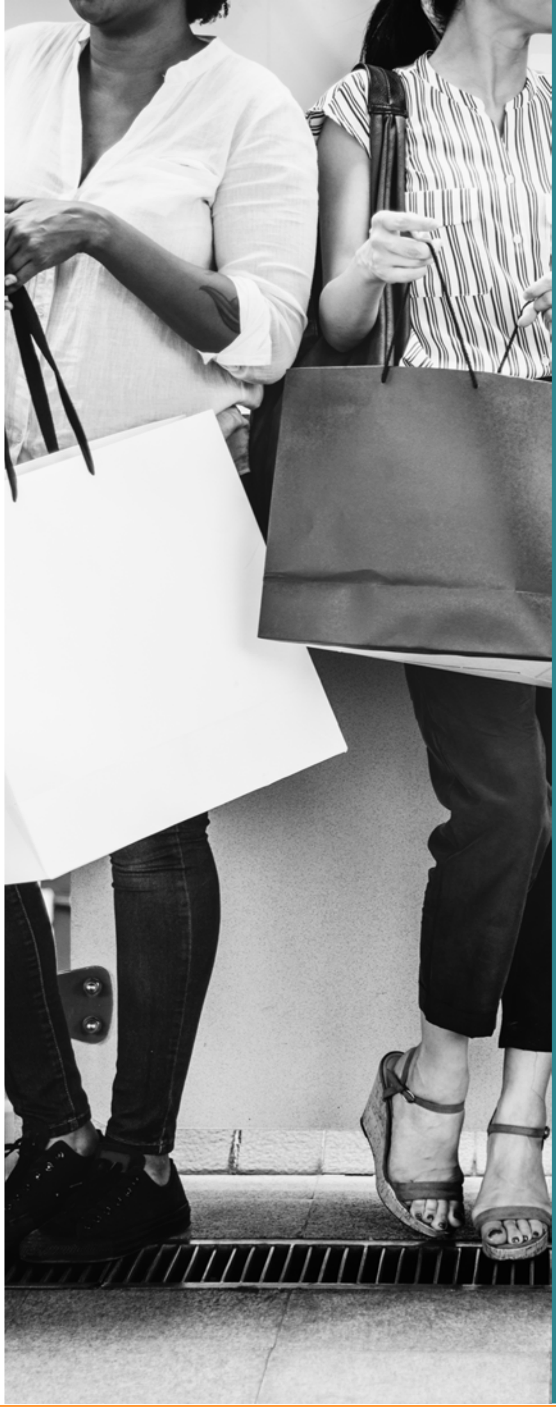
Clothing

When it comes to clothing, Americans are taking a more relaxed approach. Seventy-eight percent agree that their current attire has become more casually, and over half say that they are not wearing jeans or jewelry as much. Thus, in the current climate, athleisure wear is the most popular clothing being bought online, followed by outdoor apparel.

Shopping In-Store

Almost a fifth of Americans (17%) are most excited about going back to shopping in-store when restrictions are lifted.

However, over half are still concerned about the impact that COVID-19 will have on the retail industry.



55%

Are concerned about the impact that COVID-19 will have on shopping in-store

17%

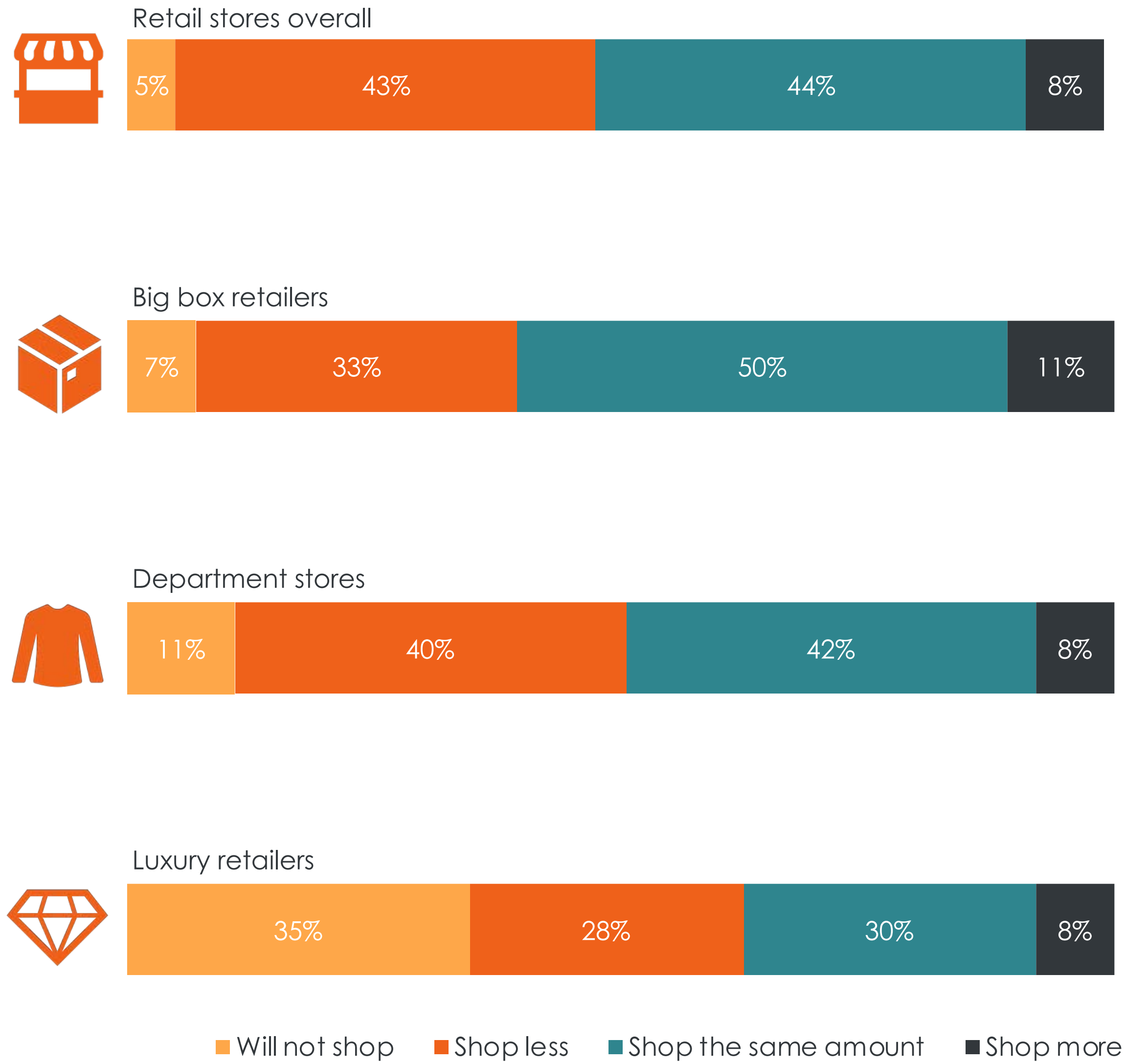
Are most excited to attend stores as restrictions are lifted

Base: All qualified respondents: N=600

Q. How concerned are you about the Covid-19 pandemic impacting the following areas? As Covid-19 restrictions are lifted, what are you most excited about attending?

Shopping by Store

Half of consumers plan to shop in-store less or not at all compared to before the global pandemic. Big box retailers will see the least change in behavior.



Q. As retail stores are reopening in the coming months, we would like your feedback. Compared to pre-COVID-19, when visiting a store in-person how will your shopping habits change?

Base: All qualified respondents: N=600

Shopping Events

More than a quarter of luxury customers are interested in scheduling an appointment for private shopping to avoid shoppers.

27% are interested in scheduling an appointment for private shopping to avoid other shoppers

25% are interested in attending virtual shopping events

Base: Plan to shop in stores (n=377)

Q. How interested are you in the following activities when it comes to purchasing luxury items? (Select one per activity)

Online Shopping

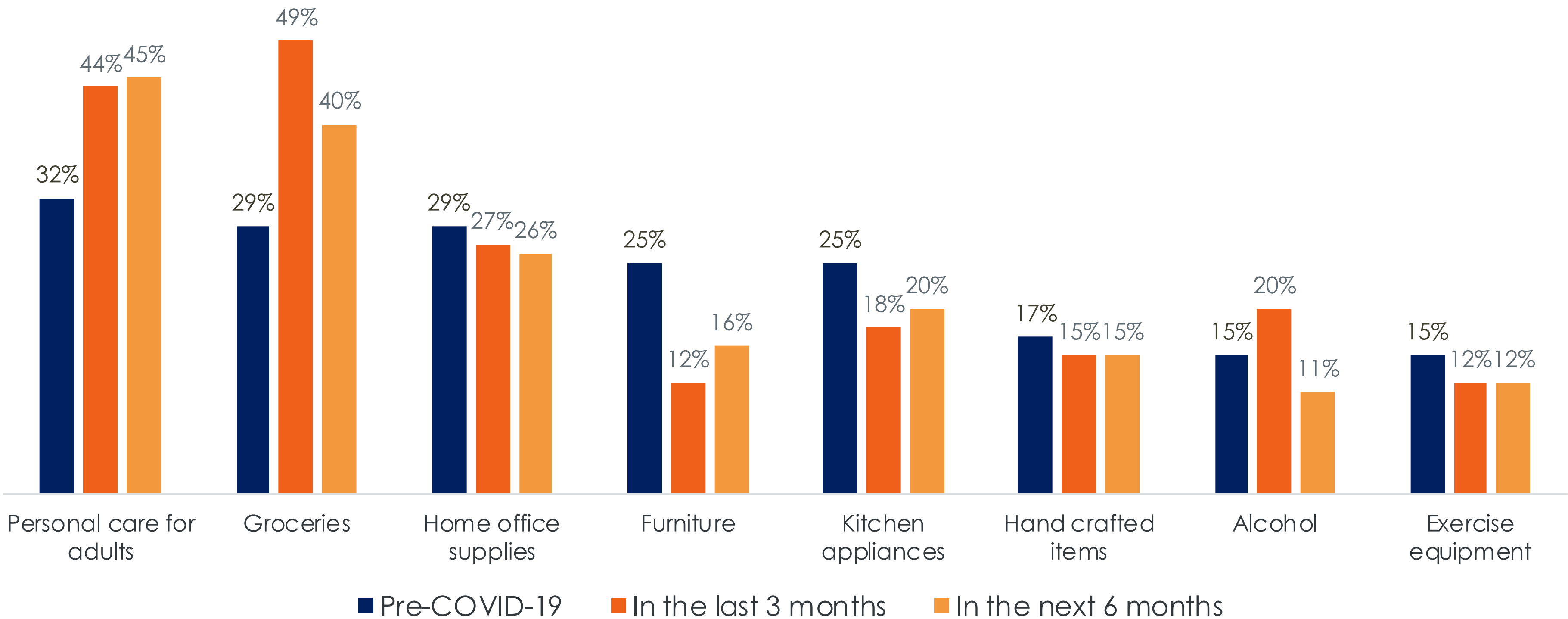
78%

say that the internet takes the hassle out of shopping

Q. How much do you agree or disagree with the following statements?

Items Purchased Online Before, During, and After COVID-19

Online groceries have seen a 20% increase in online purchasing during the last three months. Personal care, groceries, and alcohol have also had an uptake during COVID-19. Furniture and kitchen appliances have seen a decrease.

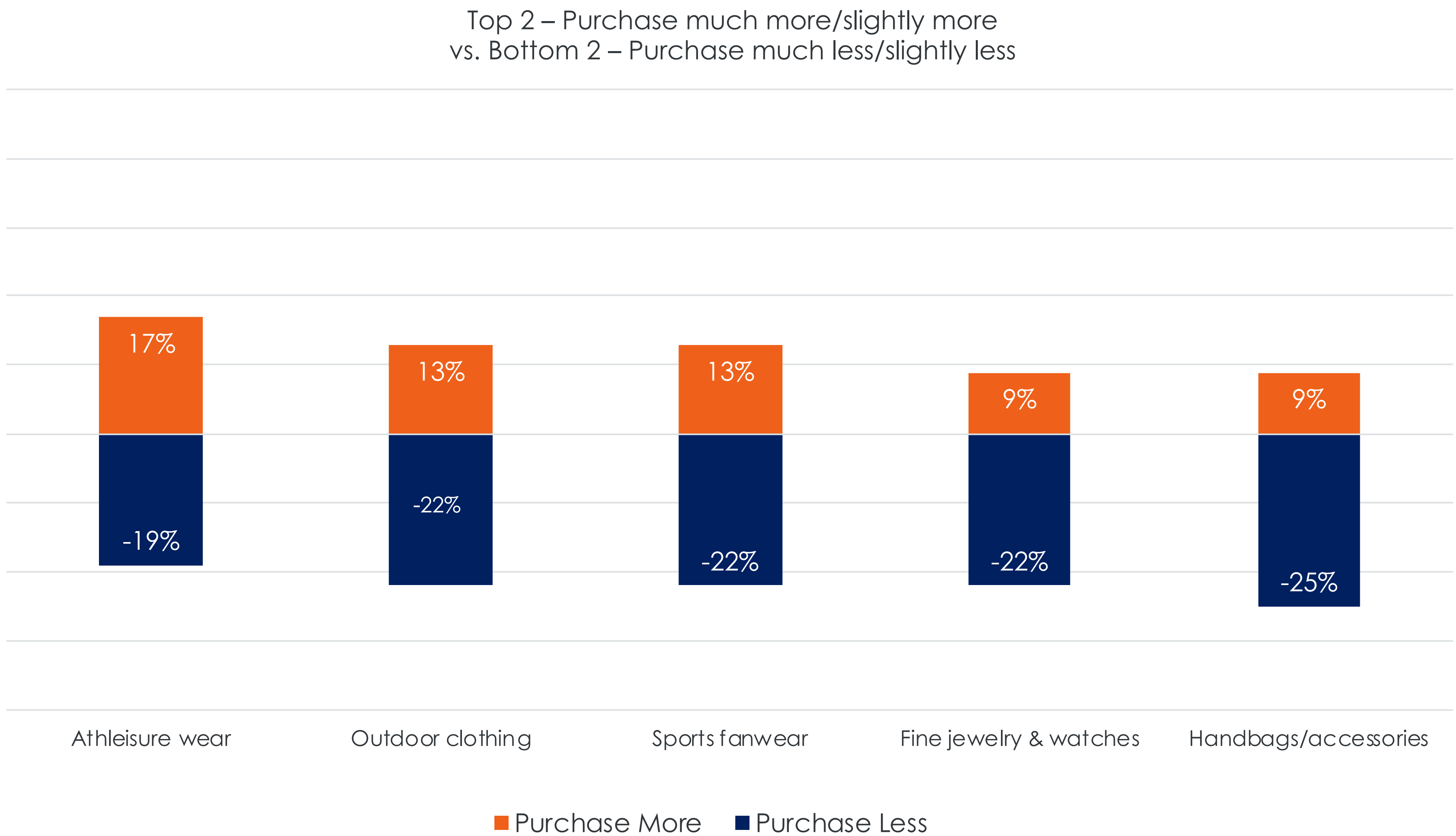


Base: All qualified respondents: N=600

Q. Which of the following items have you purchased online? / Thinking about six months into the future, which of the following items do you expect to purchase online?

Clothing Purchasing Habits

Compared to 2019, consumers are purchasing less clothing overall. Athleisure wear has seen the biggest increase in purchasing. Jewelry, watches, handbags, and accessories have seen the largest decrease.

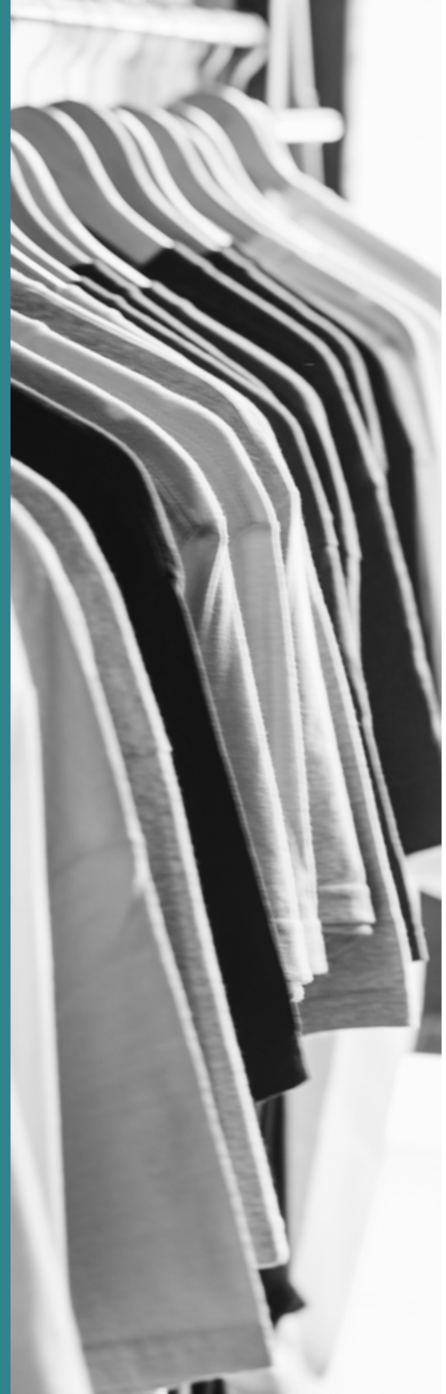


Q. Compared to 2019, how have your clothing purchasing habits changed? I purchase…

Base: All qualified respondents: N=600

Attitudes towards Clothing

Seventy-eight percent agree that their current attire has become more casually, and over half say that they are not wearing jeans or jewelry as much.



Q. How much do you agree or disagree with the following statements?

Get in Touch

For further information on this data click here, e-mail info@provokeinsights.com, or reach out to Rachael Ryan (rachael.ryan@provokeinsights.com).

Please note: the data can be broken up by the following attributes to further understand each category:

- Gender
- Geographical Area
- Household Income
- Generations
- Marital Status
- Economic Beliefs
- Employment Status
- Children in Household
- Optimism for the Future