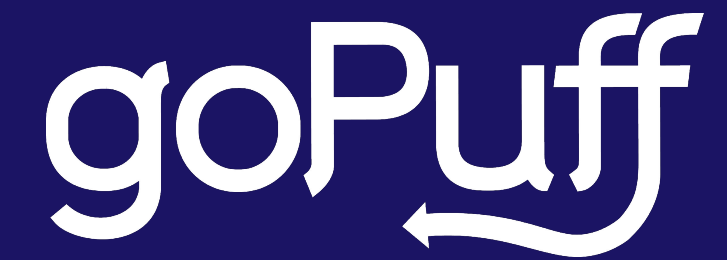


CONSUMER BEHAVIOR AMIDST COVID-19

Perspective from goPuff's Integrated Data & Consumer Research practice on how consumer behavior has changed in real time with the development of the COVID-19 crisis in the United States.



goPuff's Integrated Data & Consumer Research practice has kept a keen eye on the COVID-19 outbreak since well before it reached the United States. After taking time to collect information and observe trends, we've compiled a week-by-week perspective on the continuously adapting consumer mindset.

It is our hope that brands and individuals alike can take these insights and apply them to a thoughtful and safe path forward into the future.

**PREPARATIONS BEGIN
WEEK OF MARCH 2nd**

As cases begin to trickle into the U.S., consumers prepare by purchasing items like Purell, cleaning wipes, over-the-counter medicines & single-use gloves

**CONSUMERS STOCK UP
WEEK OF MARCH 9th**

Fearing the worst, shoppers seek peace of mind amid looming uncertainty by buying large quantities of toilet paper, frozen foods, canned goods & baby food

**THE NEW NORMAL
WEEK OF MARCH 16th**

Americans settle into life in quarantine and begin ordering more energy drinks, school supplies & popcorn to fit their new lifestyle needs

**A STAY AT HOME FUTURE
WEEK OF MARCH 23rd**

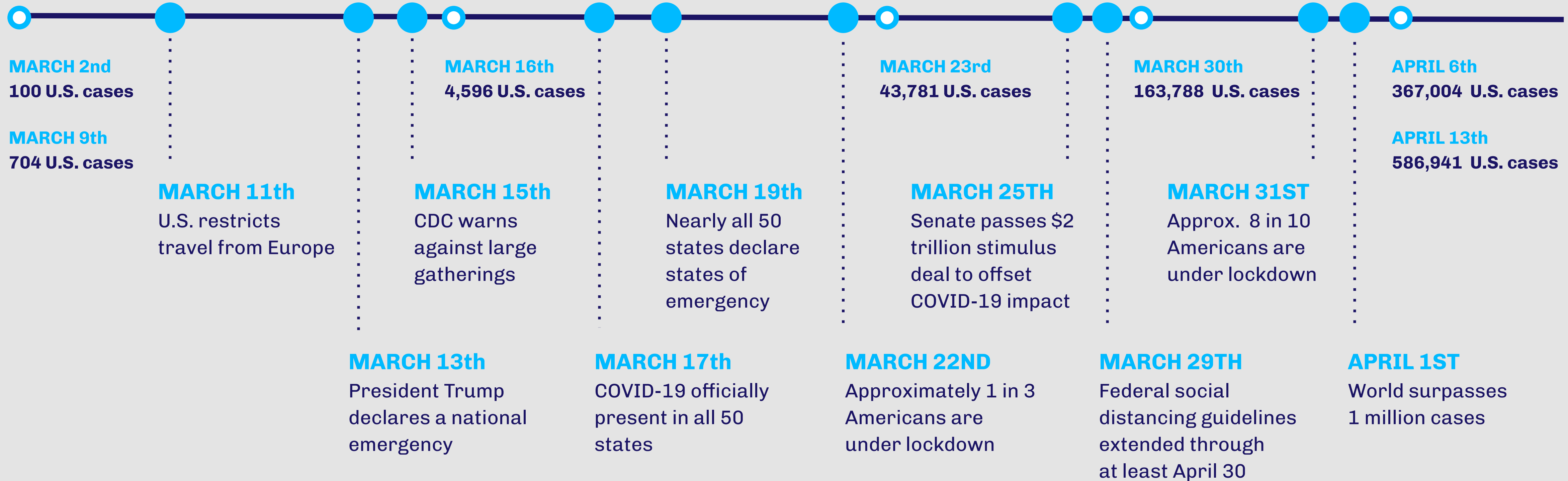
The new normal becomes entrenched as consumers double down on the items that facilitate life from home

**THE MATURING SHOPPER
WEEK OF MARCH 30th**

As Americans build routines around pandemic constraints, shopping behavior follows suit

**THE END OF THE BEGINNING
WEEK OF APRIL 6th**

After a distinct escalation and plateau of shopper behavior, consumers gain comfort with life at home and the road ahead.



WEEK OF MARCH 2nd:

PREPARATIONS BEGIN

As cases begin to trickle into the U.S., consumers prepare by purchasing items like Purell, cleaning wipes, over-the-counter medicines & single-use gloves. Though large changes in behavior are still on the horizon, we begin to see movement in certain categories that foreshadows a notable change in how people shop.

Consumers react in real-time as fears mount

Information about the novel coronavirus is still sparse and individuals react by moving toward traditional germ-fighting staples: sanitizers, cleaning products & OTC remedies. **Purell** sales subsequently spike, **increasing over 400%** vs. the previous week. Similarly, orders for **OTC medicines** and **cleaning products doubled and tripled**, respectively, compared to the first week of March 2019.

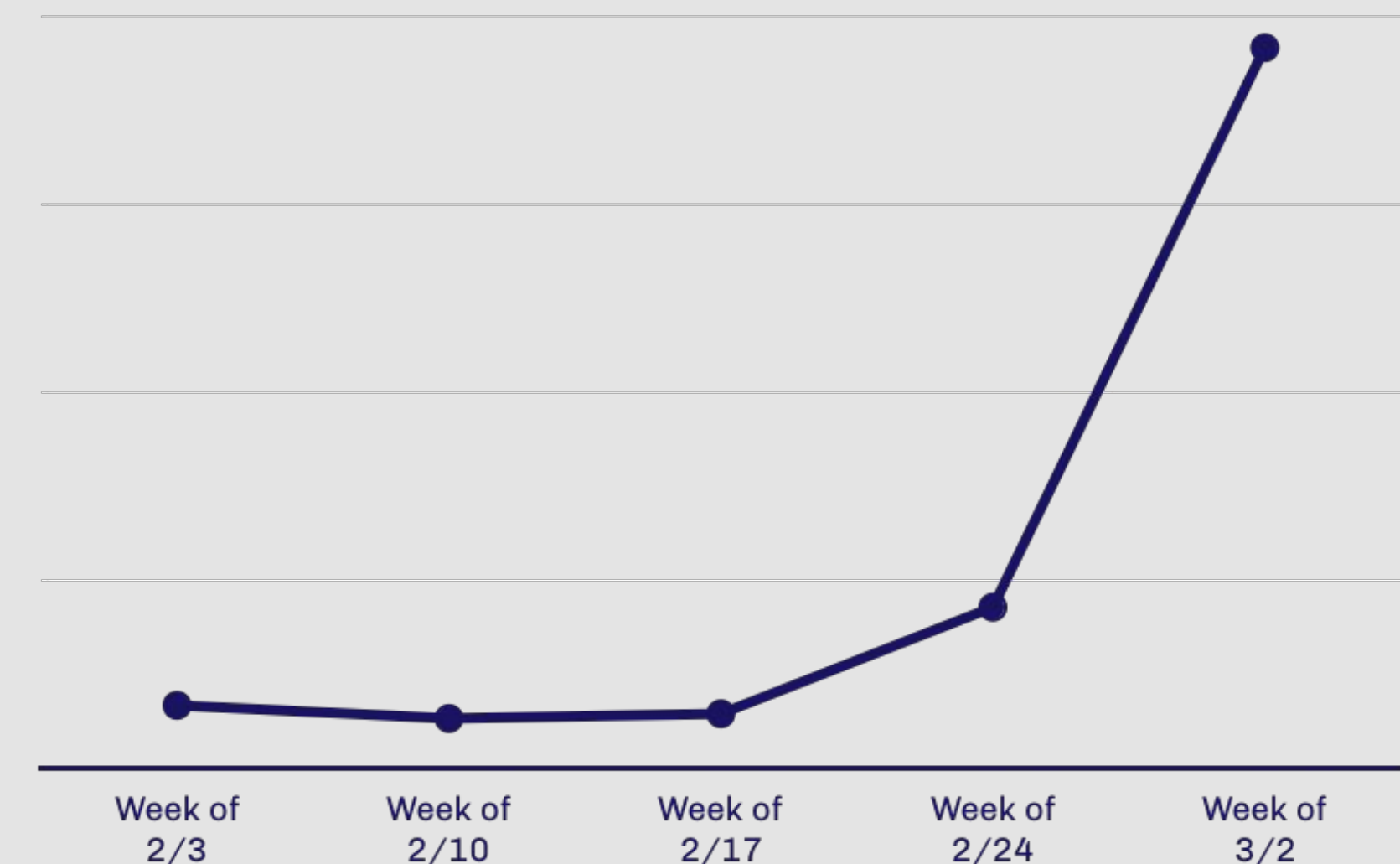
Intentional behavior remains unchanged

1 in 4 items in shoppers' carts are found through the search bar, matching the rates observed in the previous month. This consistency indicates that consumers do not yet have a differentiated level of intent when shopping our store. Similarly, the top five search terms used by goPuff shoppers ("candy," "chips," "ice cream," "water" and "milk") **remain unchanged against the pre-coronavirus period**. While there is observable movement in a few specific product categories, **existing goPuff customers have largely maintained their usual shopping behavior into the first week of March**.

So what?

Though goPuff customers have largely maintained their overall shopping habits by visiting the app at their usual times, buying the same types of products and adding items to cart in their usual ways, these shoppers begin to prepare for an uncertain future.

PURELL UNIT SALES: WEEK-OVER-WEEK



WEEK OF MARCH 9th:

CONSUMERS STOCK UP

Fearing the worst, shoppers seek peace of mind amid looming uncertainty by buying large quantities of toilet paper, frozen foods, canned goods & baby food

Mania overwhelms the market as shoppers prepare for the worst

Charmin orders increased 211% overnight on Thursday, March 12. **Digital thermometer orders in Seattle**—an early COVID-19 epicenter—**jump 500%** vs. the previous week. Shoppers in Boston order more **Mrs. Meyer's cleaning products** this week than they did in all of January.

As consumers compile necessities, units per order for **bathroom products jump 44%** vs. the previous week while **cleaning products rise 21% per order**. Similarly, **Purell** buyers begin to stock up, leading to a **97% increase** in units per order vs. the 2019 average.

Whereas “candy” was the top search term on goPuff in the previous week, **this week's top term is “water,”** symbolizing the broader COVID-induced paradigm shift.

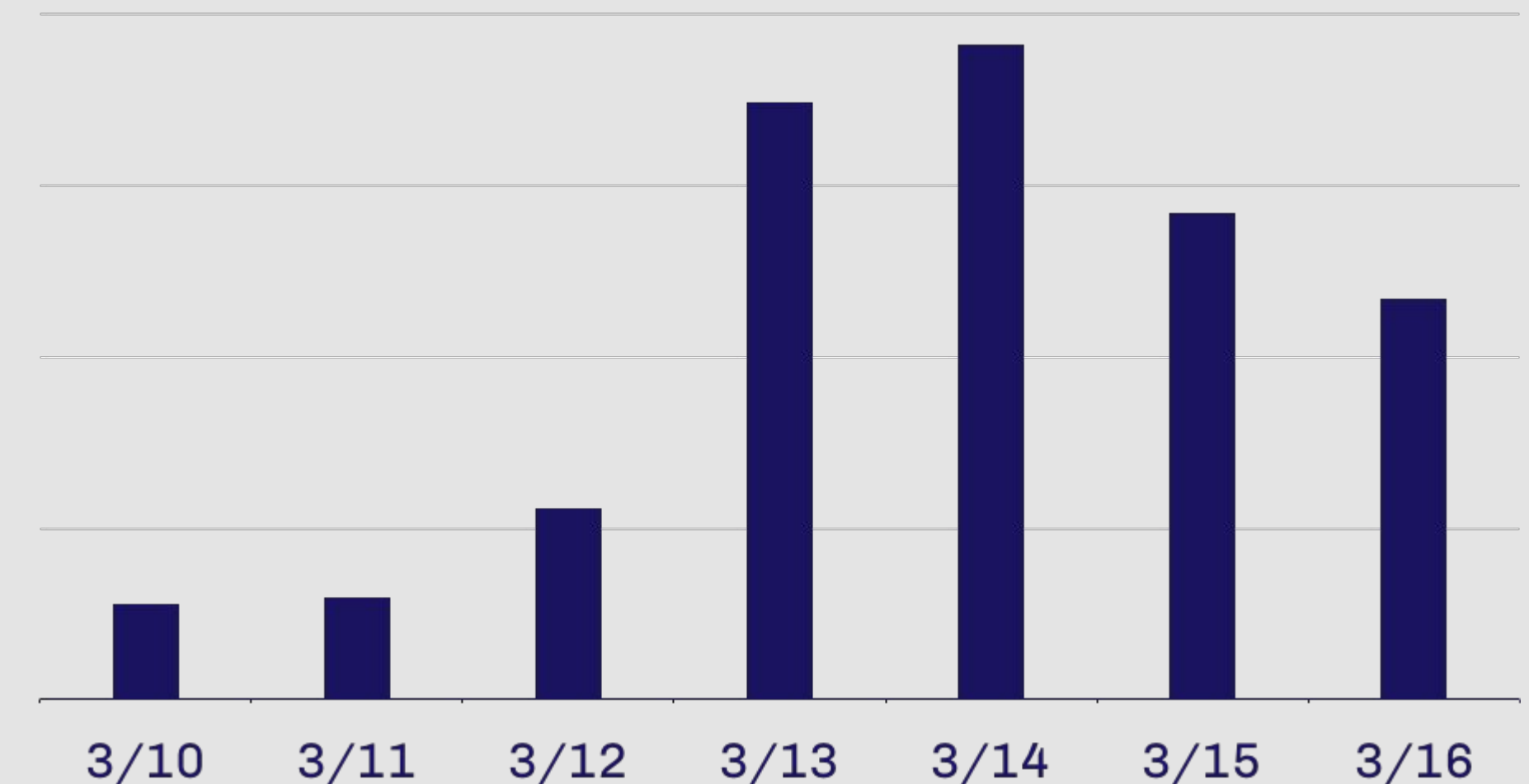
Despite the circumstances, consumers find humor in the uncertainty

While beer orders increase, shoppers keep a special focus on Corona. **Corona orders jump 71%** as consumers engage the novelty of the virus' name and seek out the brand. Corona is now **32% more likely to be added to cart following a search** than the average beer.

So what?

Following Maslow's Hierarchy of Needs, consumers are seeking solutions for their most fundamental physiological and safety needs. According to Maslow, humans must first satisfy these survival-driven needs before moving up the hierarchy.

CHARMIN UNIT SALES WEEK OF MARCH 9th



+211%

WEEK OF MARCH 16th:

THE NEW NORMAL

Americans settle into quarantine and consumer behavior stabilizes as life for many now revolves around the home for the foreseeable future. As time no longer has the strict rigidity for many Americans as it did pre-quarantine, individuals and families alike alter their habits and find new ways to pass the time.

Day structures change as shoppers tackle a new life from home

According to Adobe Analytics, **daily online grocery sales doubled** year-over-year for the first two weeks of March. As shoppers now rely heavily on goPuff and other online retailers, behavioral changes emerge.

goPuff customers begin **ordering earlier in the day**, especially when shopping for alcohol or home essentials. What's more, the **Cooking** category sees a 112% increase over the previous week, while **frozen** and **canned** items also see double-digit lifts. Consumers are preparing for the long haul by leaning into shelf-stable options.

With much of the nation working and attending school from home, goPuff observes a **127% increase in school and office supplies orders** this week alone. And while orders in the **Bathroom, Cleaning** and **Water** classes plateau as people move away from the stocking mindset, orders for **sexual health** products and playing cards take off as people...find new ways to pass the time.

Humor can only last for so long in a pandemic

In the month to date, "**beer**" and "**Corona**" have been the **top two search terms** used by goPuff shoppers looking for beer. However, "Corona" is being searched relatively less frequently than it was in the first two weeks of March, perhaps indicating that **the novelty of the coronavirus' name is wearing off**.

So what?

goPuff shopper behavior exemplifies the extent to which consumers can adapt when facing adverse situations. Preferences that once seemed fixed have proven to be malleable amid extreme conditions.

TOP COOKING SEARCHES

3/16-3/22



WEEK OF MARCH 23rd:

A STAY AT HOME FUTURE

The new normal becomes entrenched as consumers double down on the items that facilitate life from home. Shoppers turn from cleaning, disinfecting & stocking up to baking, breakfast and caffeine products as America adapts to a new lifestyle.

Once basic needs are met, shoppers can focus on their day-to-day favorites

While consumers continue to purchase school supplies and cooking products, they are pivoting toward items that power the new at-home workforce: **coffee** and **energy drinks**. Since last week, **coffee orders have grown 42%**. Energy drinks similarly outpace the average growth seen across goPuff categories.

Canned, bathroom and baby products see declines in units per order vs. the week of March 16. Data across dozens of product categories suggests that **consumers are moving away from a stockpiling/disaster preparedness mindset** as another week in quarantine passes.

Amid uncertainty, shoppers are willing to act on incorrect or incomplete information

Unfortunately, misinformation exists about the intricacies of COVID-19. Over the past few weeks, a viral text message has stated that ibuprofen exacerbates COVID-19 symptoms, and shoppers should instead use acetaminophen. goPuff data shows **acetaminophen brands growing rapidly** over the past three weeks while **ibuprofen orders stayed flat**. As information debunking this myth emerged this week, shoppers purchased brands from both categories more evenly.

So what?

In times of crisis, both individuals and brands must be mindful about the information they put into the world. What's more, brands must be cognizant about the information being put out about them. As people will latch onto information that provides a sense of safety, security or comfort, it is highly important to seek truth and facts before sharing data and information.

SEARCH TERM RANKINGS VS. PREVIOUS WEEK

BREAKFAST RELATED SEARCHES

“breakfast”	↑	40 spots
“coffee”	↑	38 spots
“orange juice”	↑	22 spots
“creamer”	↑	20 spots

BAKING RELATED SEARCHES

“chocolate chips”	↑	68 spots
“flour”	↑	35 spots
“brownie”	↑	33 spots
“baking”	↑	32 spots
“sugar”	↑	29 spots

WEEK OF MARCH 30th:

THE MATURING SHOPPER

As Americans become more entrenched in the pandemic, so does their shopping behavior.

goPuff shopper behavior normalizes as a formerly novel situation becomes the status quo

After displaying a unique arc, consumer behavior has plateaued as the *new normal* just becomes *normal*. goPuff customers have settled down into more frequent, but less-panicked behavior. The **top 10 searches on goPuff show no change** as consumers become content with the items they've procured to survive quarantine. While shoppers are visiting goPuff more frequently, they no longer scour the app for specific items like hand sanitizer and water. They have returned to their usual ways of shopping on the platform.

Anxiety-driven shopping continues to fade in the rearview mirror

Uncertainty around product availability and supply shocks has waned with each passing week. Across the goPuff portfolio, shoppers **maintain consistent units per order** for most products, including items like energy drinks and on-the-go snacks, which saw increases as recently as last week. Though shoppers continue to look to goPuff to fulfill their convenience and grocery needs, they are now much less frantic in doing so.

goPuff serves online shoppers as they mature in real-time

As each week passes, the goPuff customer base grows to include **slightly older** consumers and those who shop the platform **earlier in the day**. What's more, older individuals are **ordering from all goPuff departments** more frequently. We now begin to see a picture of the changing online shopper. Though online grocery and convenience shopping primarily resonates with younger, tech-savvy consumers, the pandemic has encouraged older shoppers to see the value these services can add to their lives.

So what?

As the quarantine wears on, consumers continue to adjust and normalize their shopping habits. Expect the public to rely on food and grocery delivery services even more after life returns to normal. It may become hard for shoppers to part with services like goPuff now that they have incorporated them into their daily routines over a period of weeks or months.

WEEK OF APRIL 6th:

THE END OF THE BEGINNING

After a distinct escalation and plateau of shopper behavior, consumers gain comfort with life at home and the road ahead. As stay-at-home orders remain in place, Americans look toward the next phase of life from home.

Americans remain entrenched in the new normal and have acclimated to the new rhythm of life.

As searches and orders for Coronavirus necessities level, shoppers stay focused on the items that power their new lifestyle. While **Cleaning** orders continue to grow, goPuff customers showed more interest in **Coffee, Energy Drinks, Cooking, and Condiments** this week.

Consumers lean into DIY fixes as salons and barbershops remain inaccessible.

As roots grow out and fades grow in, consumers look to the medicine cabinet for grooming help. With many shoppers now having gone more than a month since visiting their favorite stylist, goPuff's **Beauty** category has **grown 113%** since the first week of March. goPuff has also seen a **double-digit volume increase** this week for **Gillette and Venus** shaving products as shoppers are now keenly aware of their interrupted personal care cadence.

Shoppers continue to adopt digital retailers as the pandemic disrupts traditional channel mixes.

While new customers initially came to goPuff for pandemic categories like hand sanitizer, toilet paper, and bottled water, these individuals have **grown their baskets** to now include everyday items like **Bars, Energy Drinks, and Feminine Care** products. Consequently, **new customers order value surpassed that of existing goPuff customers** in 5 of 7 days this week, highlighting the growing impact of changes in the shopping environment.

So what?

The first phase of COVID-19's consumer impact has come to an end after following a distinct arc from panic and preparedness to comfort and adaptation. Brands must pay keen attention to the next chapter of the Coronavirus story, as this period will further entrench habits established in quarantine.

“Now this is not the end. It is not even the beginning of the end. But it is, perhaps, the end of the beginning.”

-- SIR WINSTON CHURCHILL

WHAT'S AHEAD:

PREDICTIONS FOR THE FUTURE

Awareness and appreciation of delivery services' convenience lead to an increase in long-term use

Consumers have shifted quickly and decisively to delivery over the past several weeks and are using the service frequently: goPuff saw a nearly **90% increase in customers ordering at least once per week** (vs. March 2019), and a **55% increase in order value**. Given this shift, and greater awareness of essential delivery services, we anticipate **consumers will turn to delivery** more in the weeks and months that follow than they have in years past.

More cooks in the kitchen

While there's no reason to believe people will reallocate their former commuting time to cooking elaborate three-course meals, individuals and families alike have turned to home cooking as a necessity. Expect a **resurgence in cooking at home** as the novelty turns into a habit, even if it's just swapping eating out for staying in a bit more each week.



112%

**INCREASE IN
COOKING CATEGORY**

WHAT'S AHEAD:

PREDICTIONS FOR THE FUTURE

Out with the fresh, in with the frozen: welcome fast-casual cooking

Shoppers will always prefer fresh meat and produce over canned and frozen alternatives, as long as they are available. Following COVID-19 however, we predict many shoppers will have **lessened their aversion** to frozen options. Pandemic-induced behavioral changes may open the door to products and brands that previously could not establish a foothold in the fresh-food space. Instead of leaving the store empty handed when a certain item is unavailable, we expect shoppers to be **more willing to seek frozen alternatives** in the post-pandemic time.

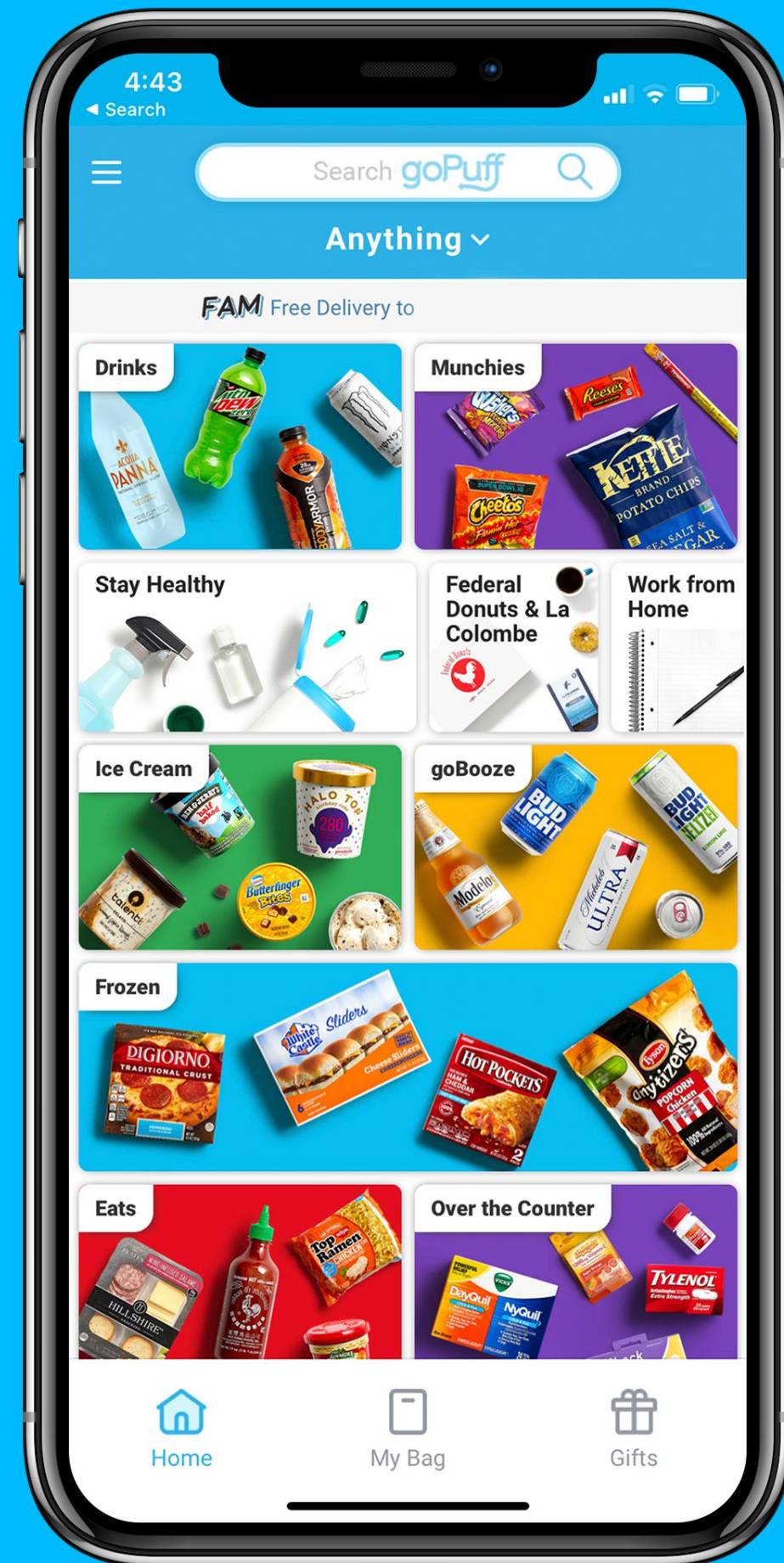
Renewed connections and strengthened ties

As seen in behavioral changes over the course of the past month, **Americans have adapted** their behavior to fit the new reality. Both despite and because of isolation, friends, families & coworkers are turning to new methods of engaging with each other. While virtual happy hours and social distancing get togethers will fade as the pandemic subsides, **expect communities to emerge more connected than before**. As such, brands may continue to message on these newfound connections while celebrating a revived sense of freedom. Personal, family and community events will have newfound meaning and importance. **Brands should take time to identify how they fit into these moments and how they can help consumers feel more connected to one another.**

WANT TO CONTINUE THE CONVERSATION?

Contact goPuff's Integrated Data & Consumer Research practice at consumerinsights@gopuff.com to learn more about how you can leverage deep behavioral insight & take your brand to the next level.

ABOUT goPuff



goPuff delivers everyday essentials, from cleaning supplies and over-the-counter medicines to food, drinks & more in just minutes. With its centrally located facilities in every local market it serves, the company delivers thousands of products quickly and for a flat \$1.95 delivery fee. goPuff operates 24/7 in most markets and from noon to 4:30 am everywhere else to bring customers the everyday essentials they need most—and when they need it. goPuff also delivers beer, wine & liquor in select locations.

Headquartered in Philadelphia, goPuff was founded in 2013 and currently operates in over 180+ U.S. locations, including Atlanta, Boston, Chicago, Dallas, Denver, Philadelphia, Phoenix, Seattle, Pittsburgh, Washington, D.C. and many more. To learn more, visit www.gopuff.com or follow goPuff on [Facebook](#), [Twitter](#) or [Instagram](#). Download the goPuff app on [iOS](#) and [Android](#).

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