



Home Retail Monitor

March 9, 2022



Methodology

N = 744

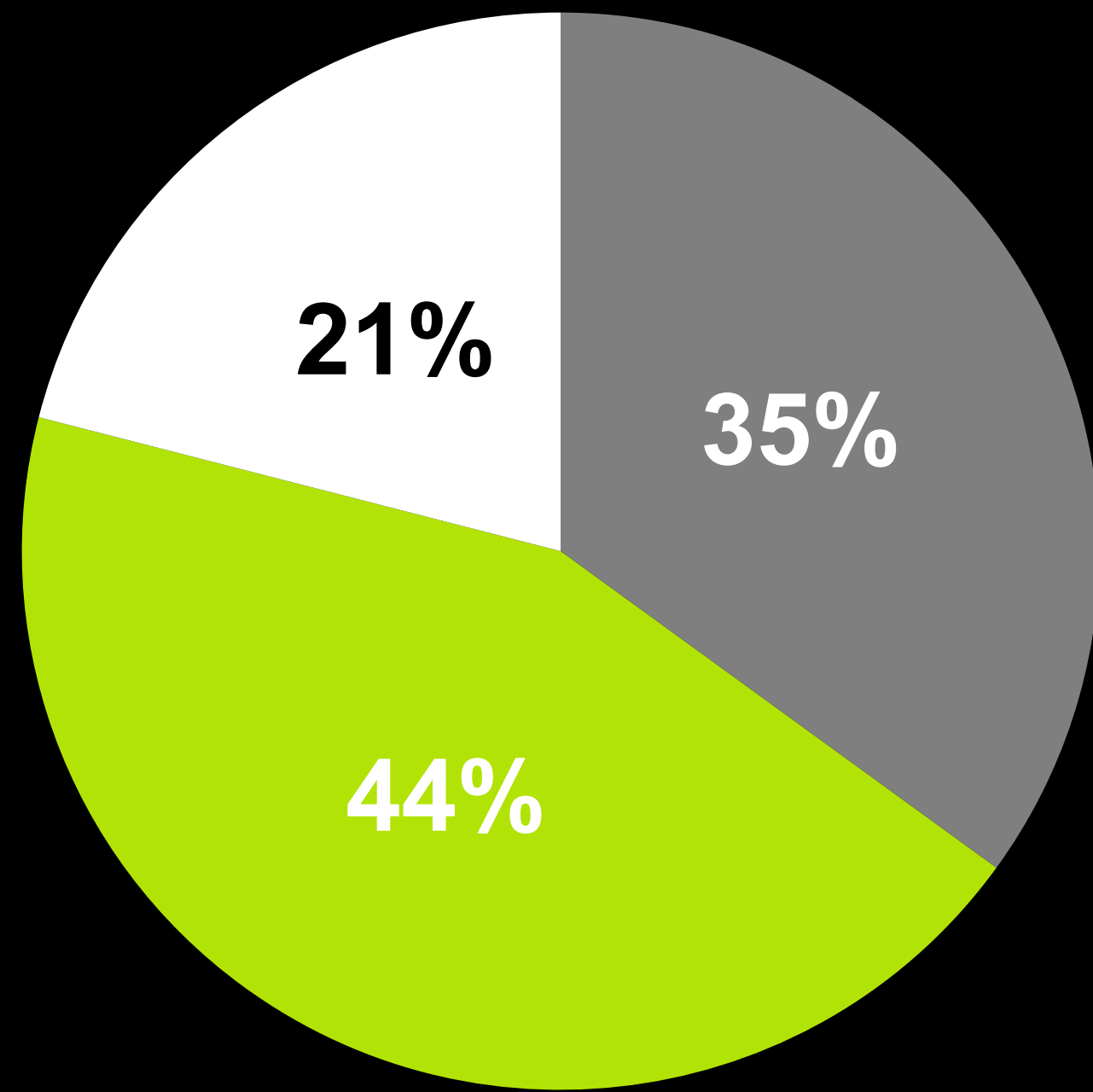
MOE \pm 3.59%

Panel: General Population

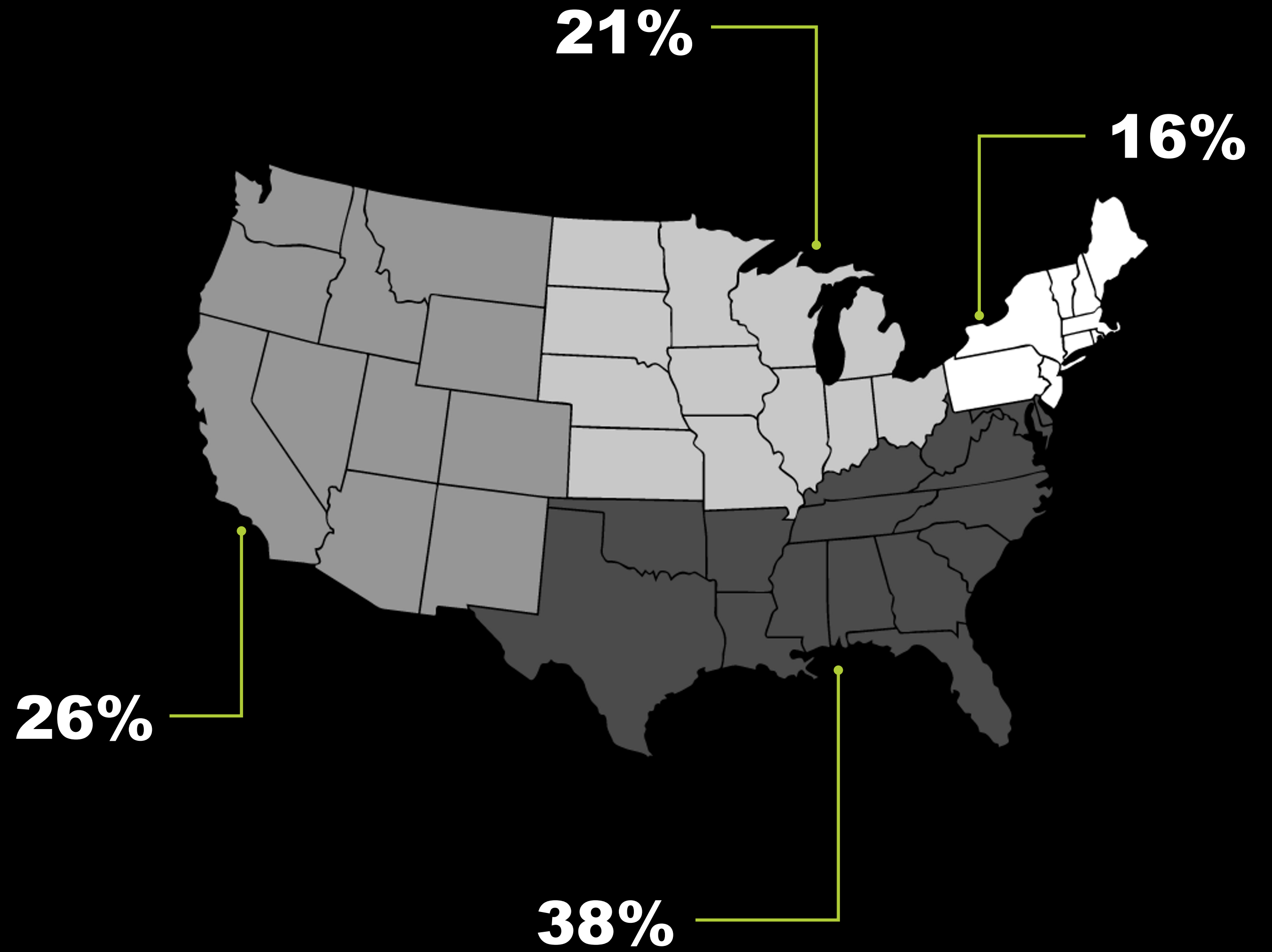
Collected: 2/25/22, 2/26/22



Urbanicity

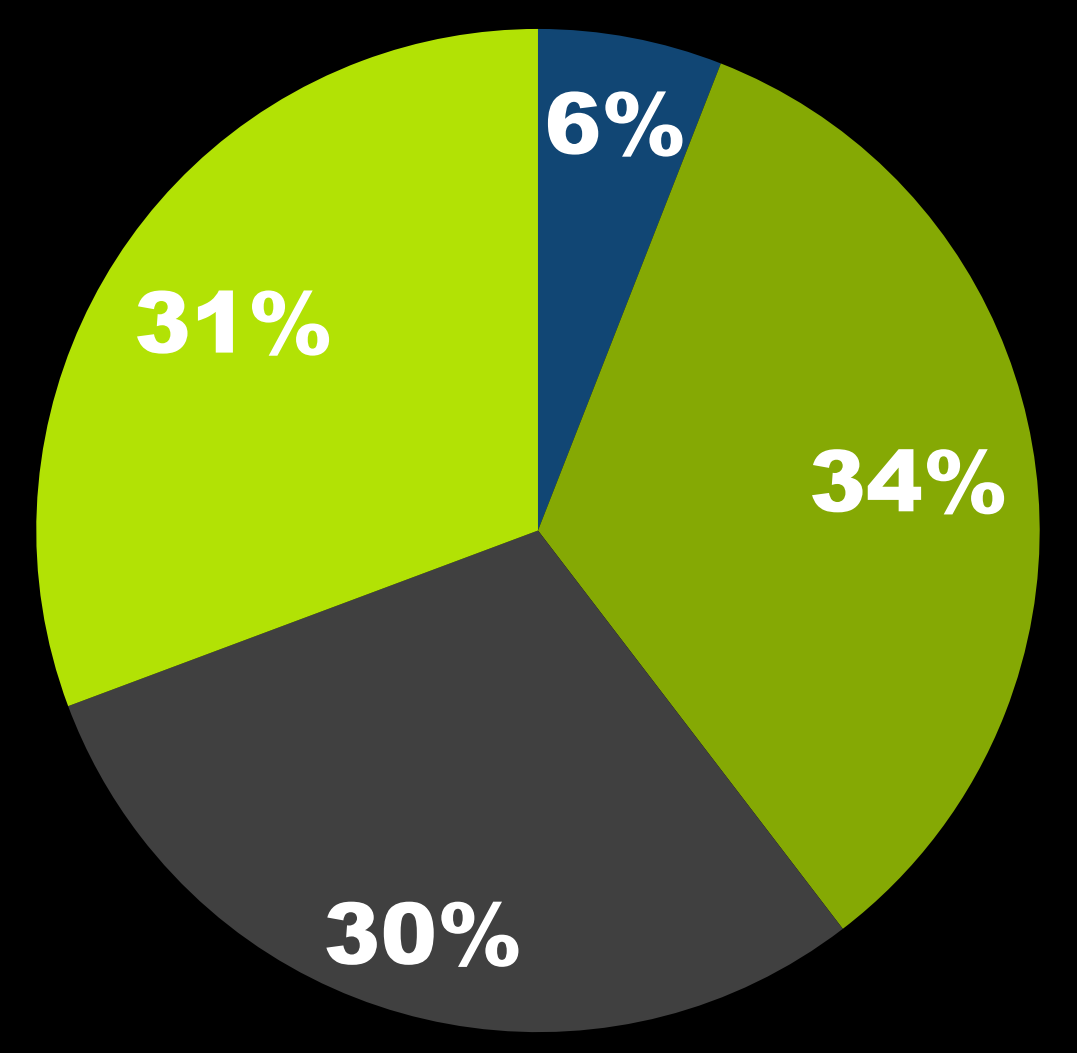


■ Urban ■ Suburban ■ Rural



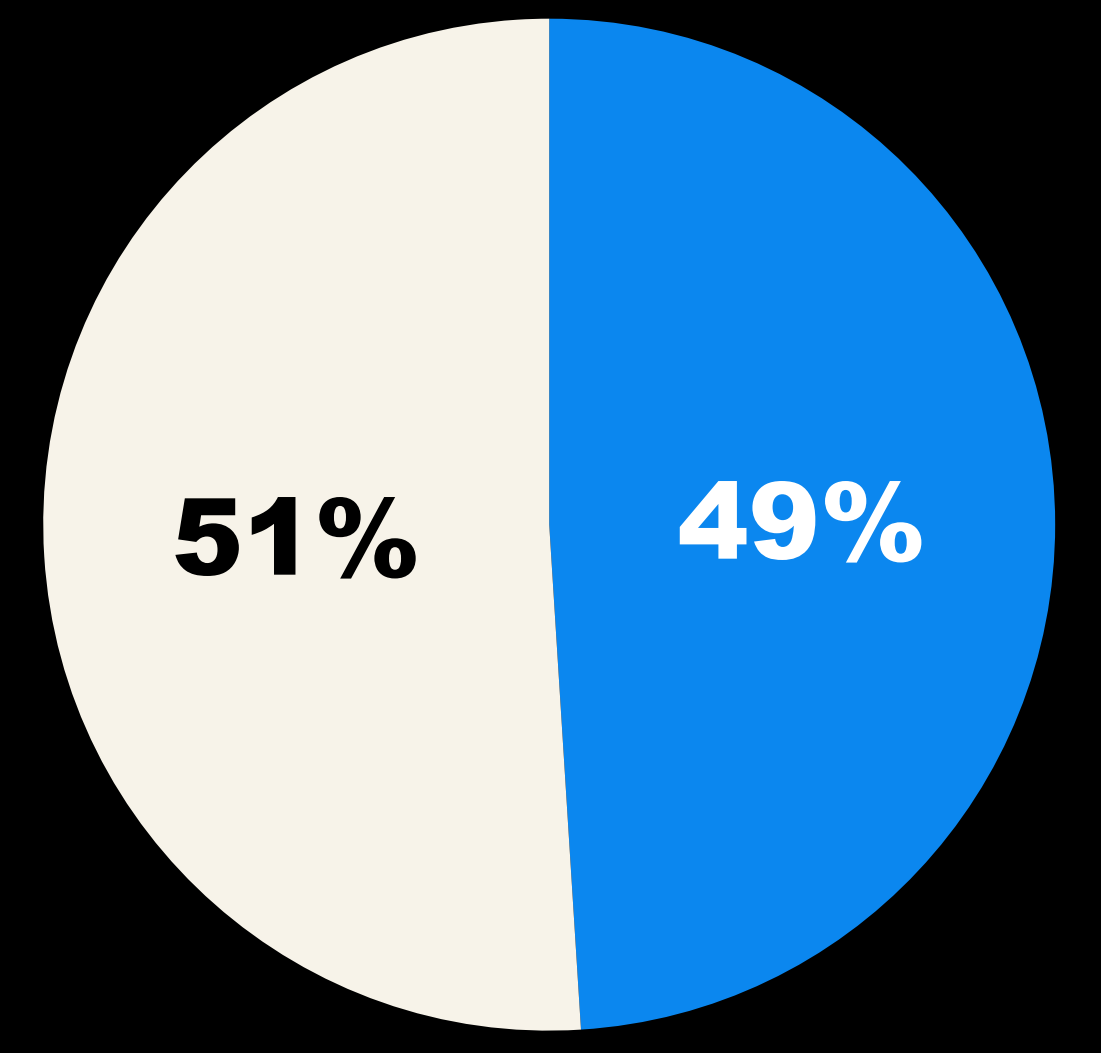


Generation



■ Gen Z ■ Millennial ■ Gen X ■ Boomer

Gender



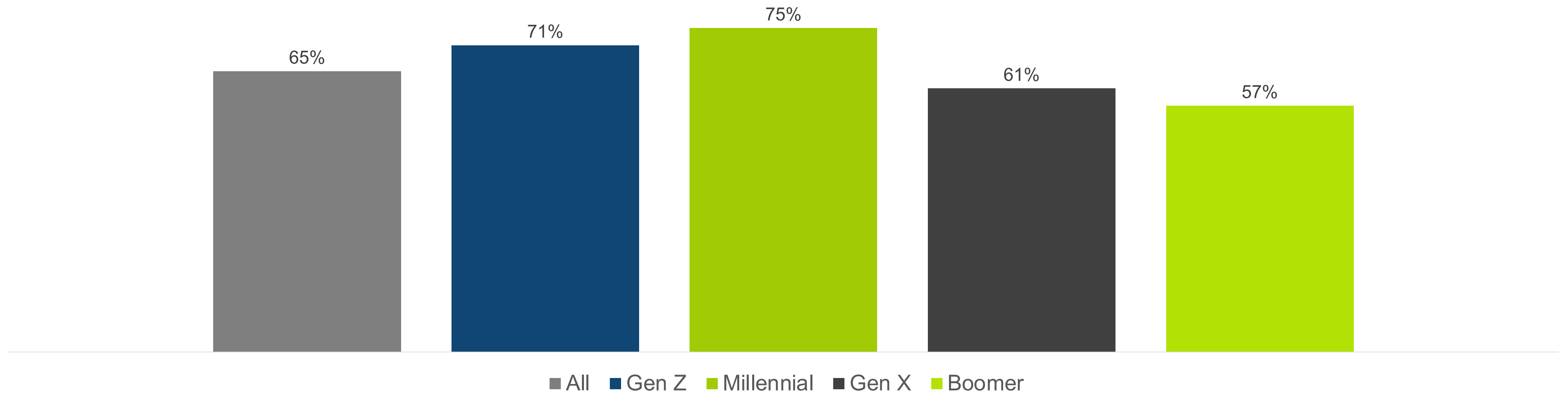
■ Male ■ Female

A woman with curly hair, wearing a white long-sleeved shirt and a blue and white striped skirt, is handing a brown paper shopping bag to a person inside a white car. The scene is set in a parking lot with other cars visible in the background. The image has a dark, semi-transparent overlay.

Purchase Online for Pick Up at Store

Nearly two-thirds (65%) of respondents have made online purchases for pick up at the store in the past year.

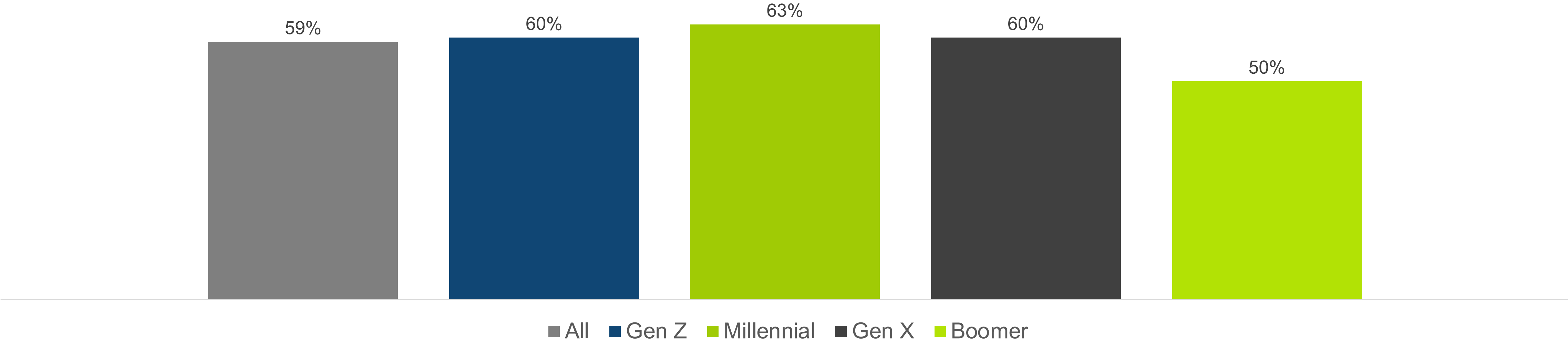
% Who have made purchase in the past year using order online and pick up at the store



Have you made any purchases in the past year using the order online and pick up at the store method?

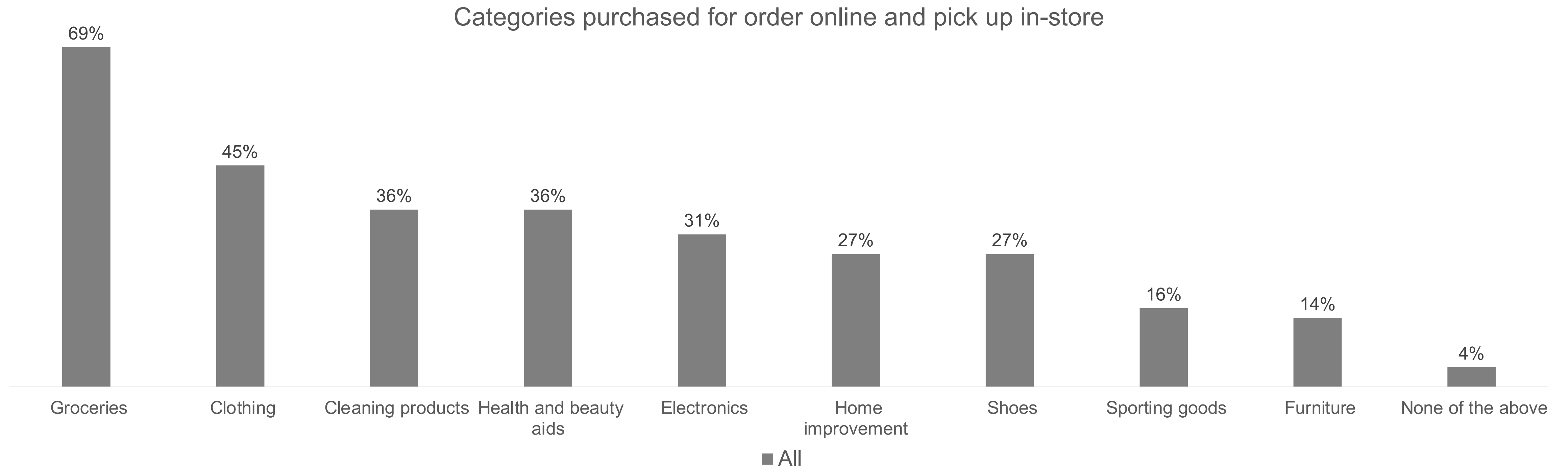
Of the 65% who have made purchases online for pickup, 41% adopted the process after the arrival of COVID.

% Who purchased online and picked up in-store before COVID



Did you purchase online and pick up at store before COVID?

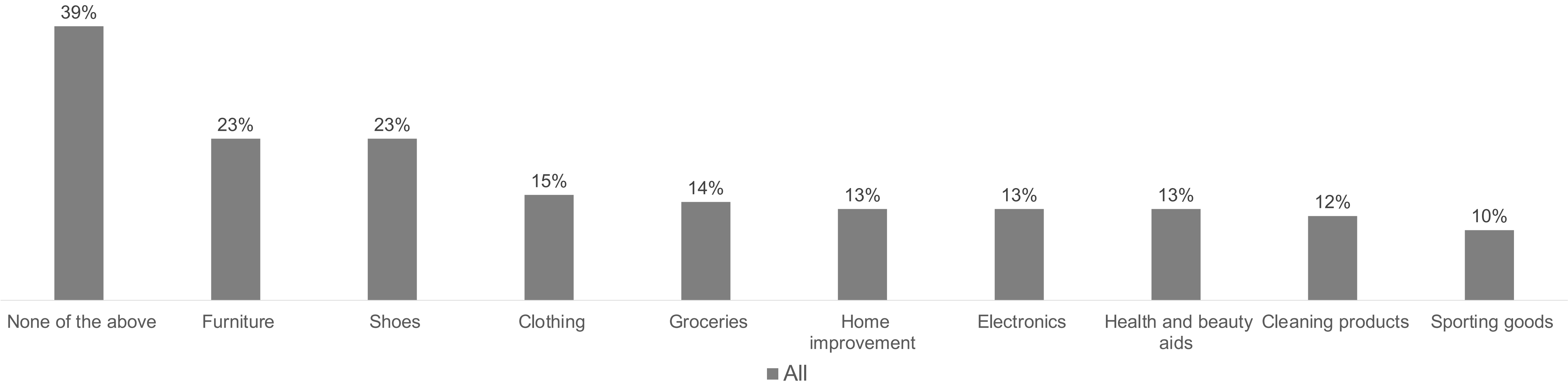
The most popular categories for online purchase and store pickup are groceries (69%) and clothing (45%).



In the past year in which of the following categories have you made purchases online that you've picked up at the store? Select all that apply.

61% of the respondents using the service have one or more categories they would not purchase online for pickup.

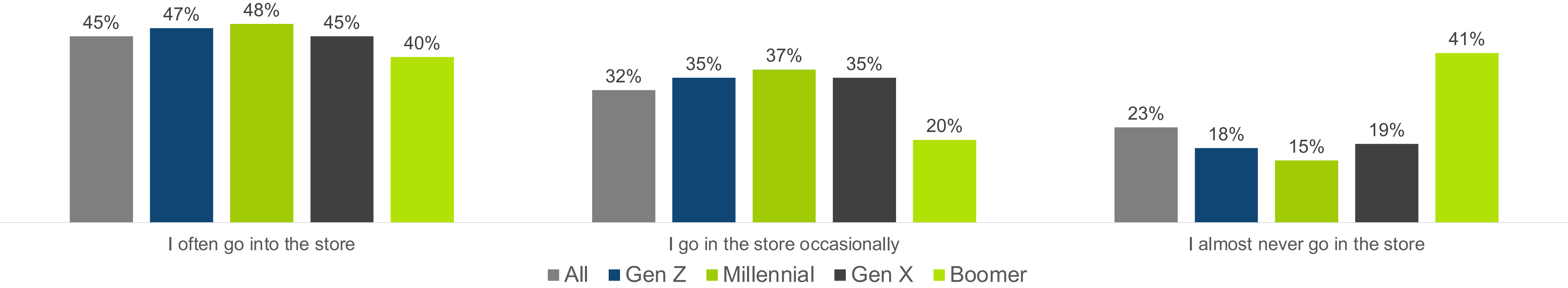
Categories would never purchase for order online and pick up in-store



Which of the following categories would you never purchase online for store pick up? Select all that apply.

Of those who order online for store pickup, a significant majority (77%) enter the store at least occasionally. Boomers (41%) are far and away the most likely to never go into the store.

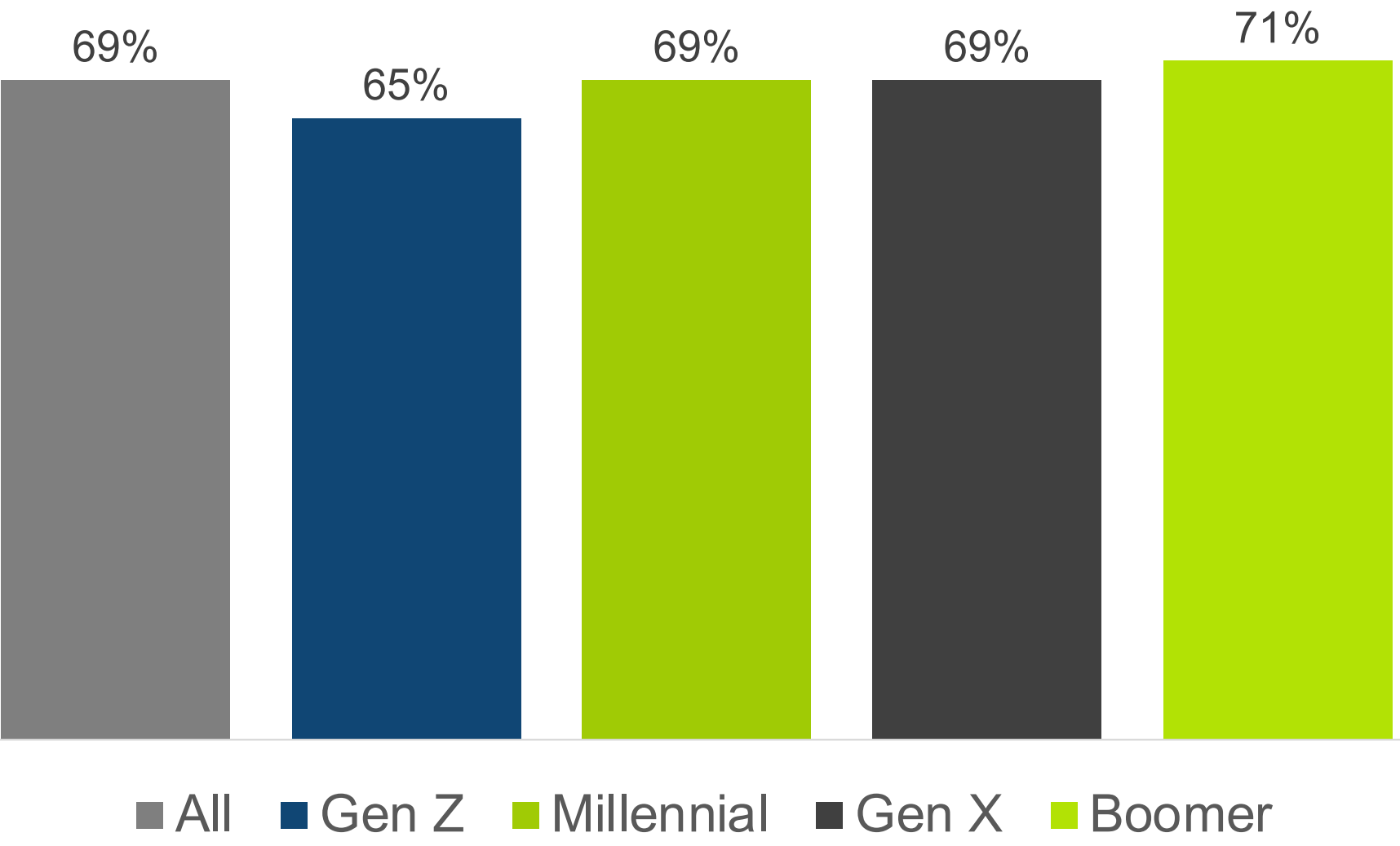
% Who enter store when they order online and pick up in-store



When ordering online for store pick up, do you ever enter the store? Or are all your pickups brought to your car?

Getting people out of their cars and into the stores benefits the retailer as 69% indicate making additional purchases.

% Who purchase additional items when they order online and pick up in-store

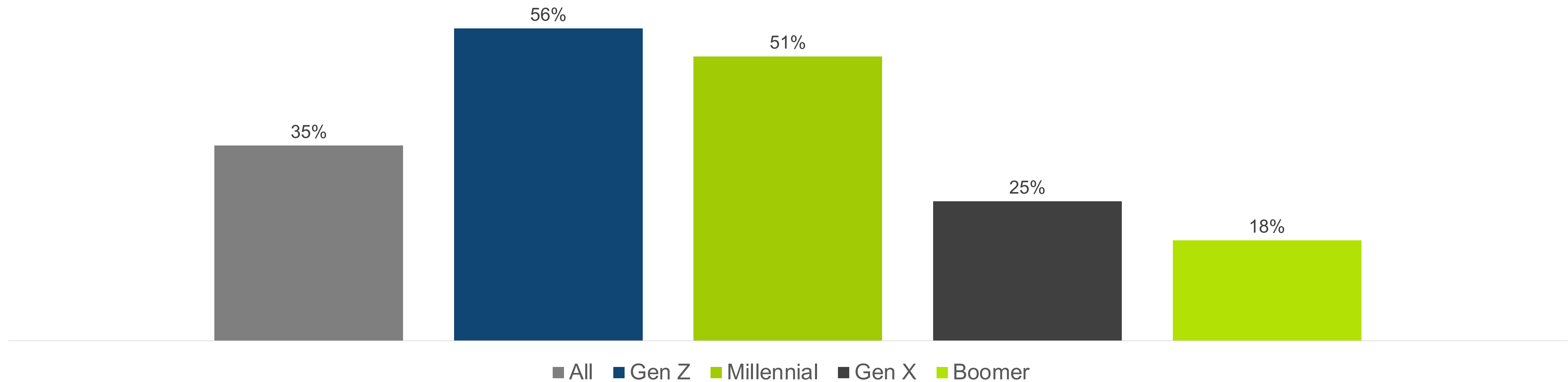


When you enter the store when picking up your online order do you find yourself buying other items as well?



More than one person in three (35%) have changed a store allegiance because of a preference for another retailer's online ordering/pickup system.

% Who have changed store shopped for a better order online and pick up in-store method



Have you changed any of the stores that you shop because a store's online ordering/pickup program is better than others?

More people (40%) expect their online purchases for store pickup to decline post COVID than those who expect them to increase (13%).

Order online and pick up in-store behavior change when COVID is brought under control



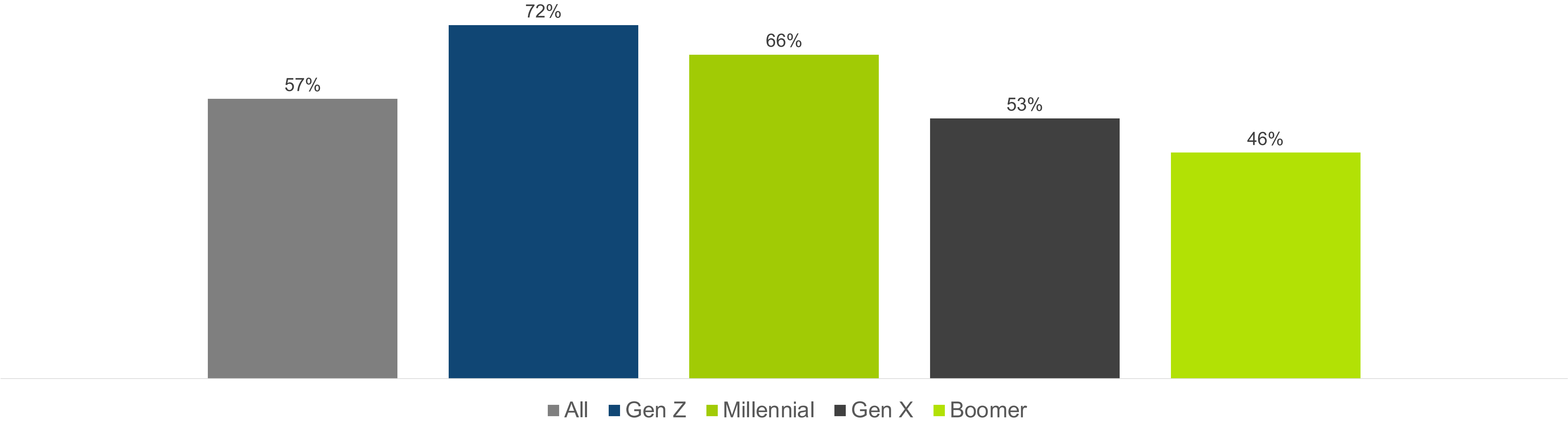
Which of the following best describes how your online purchases for store pick up will change when COVID is brought under control?

In Person vs. Video Conference



57% of employed respondents have had some business dealings via online conferencing during COVID.

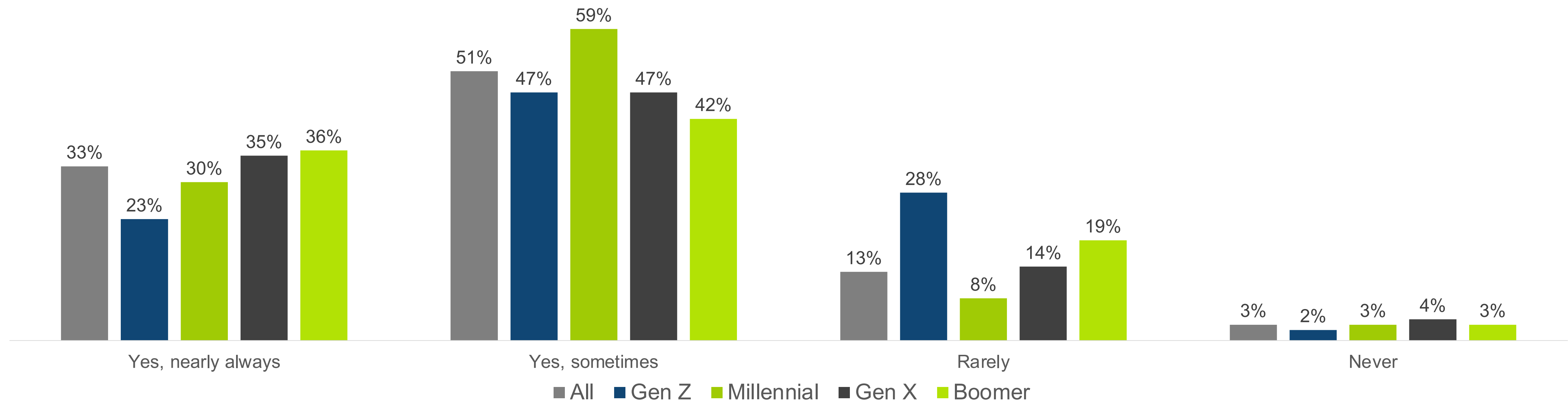
% Who have conducted business through a video conference system



As a result of COVID have you had to conduct business via a video conference system (Zoom, Microsoft Teams, etc.) that you would have conducted in-person previously?

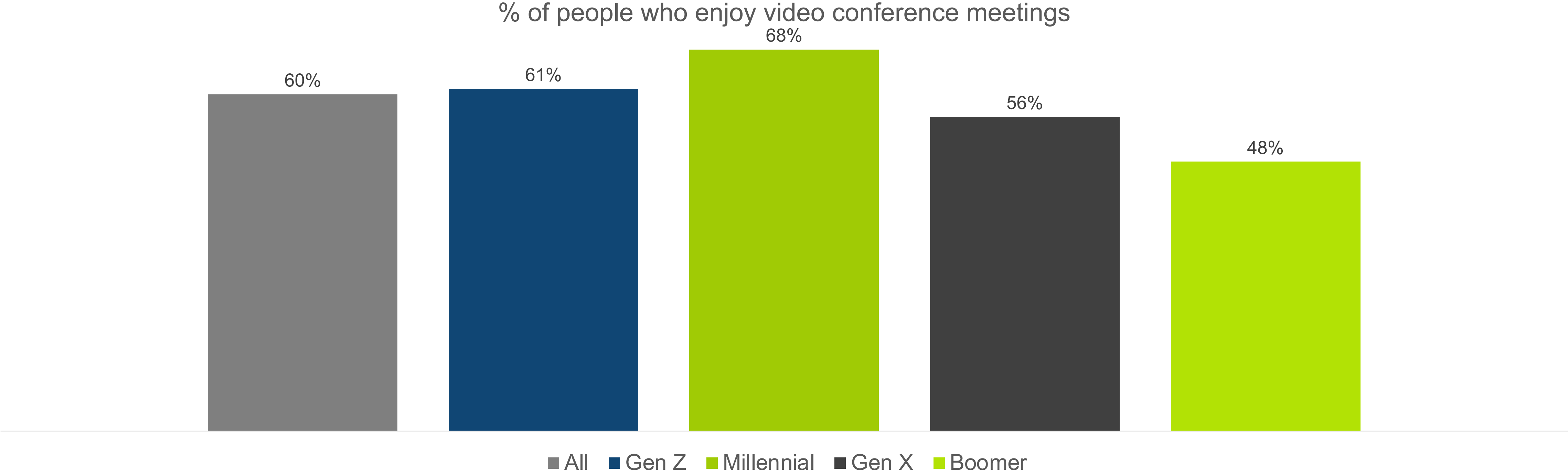
Only 33% feel that video conferencing is nearly always as productive as in-person meetings.

Productiveness of video conference meetings vs. in-person meetings



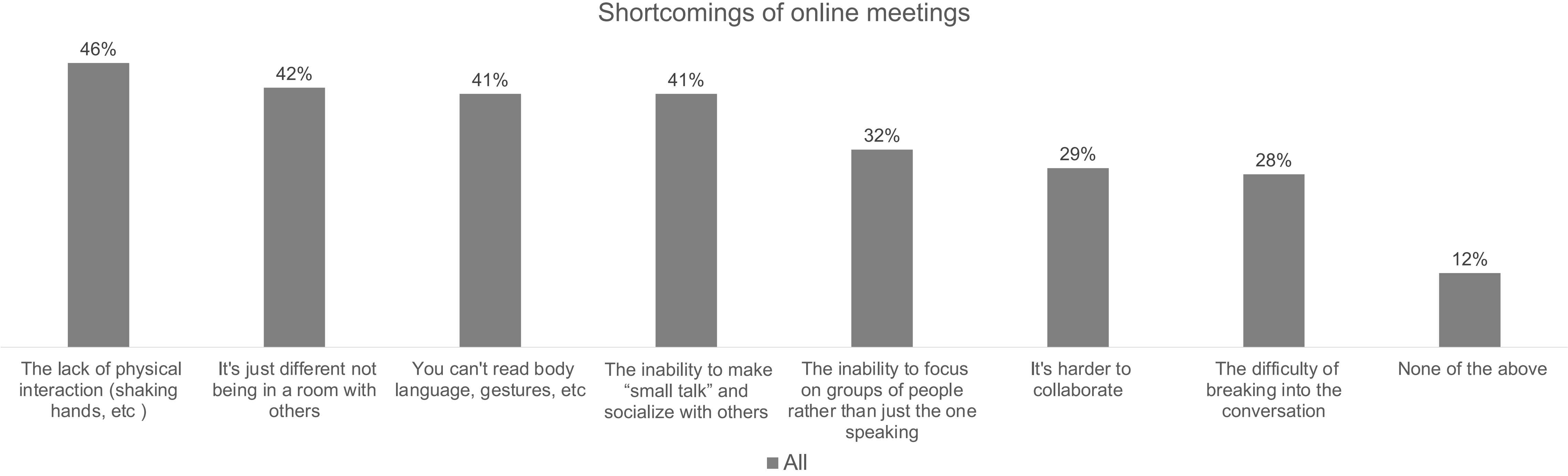
Do you feel you get as much done in meetings using a video conference system vs. in-person meetings?

Despite the reduced productivity, 60% of those who've used video conferencing for business find that they enjoy it.



Do you find video conference meetings as enjoyable as in-person meetings?

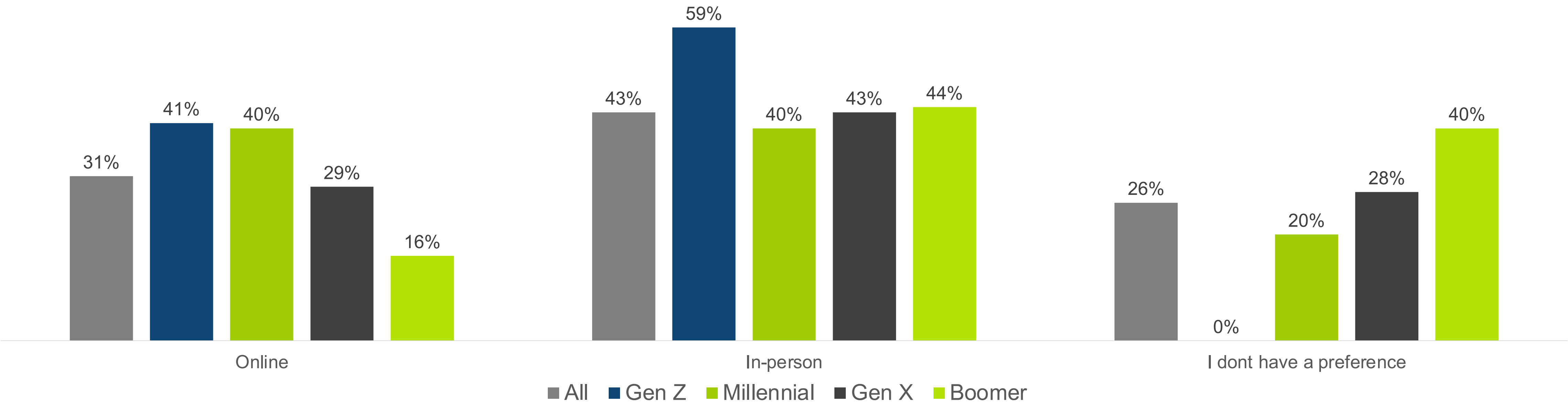
Only 12% of respondents find no shortcomings in business video conferencing. The other 88% have an average of 2.5 items they don't care for.



**Which of the following do you find as shortcomings of online meetings?
Select all that apply.**

In person meetings are preferred by 43% of respondents while online is preferred by 31%. 26% have no preference.

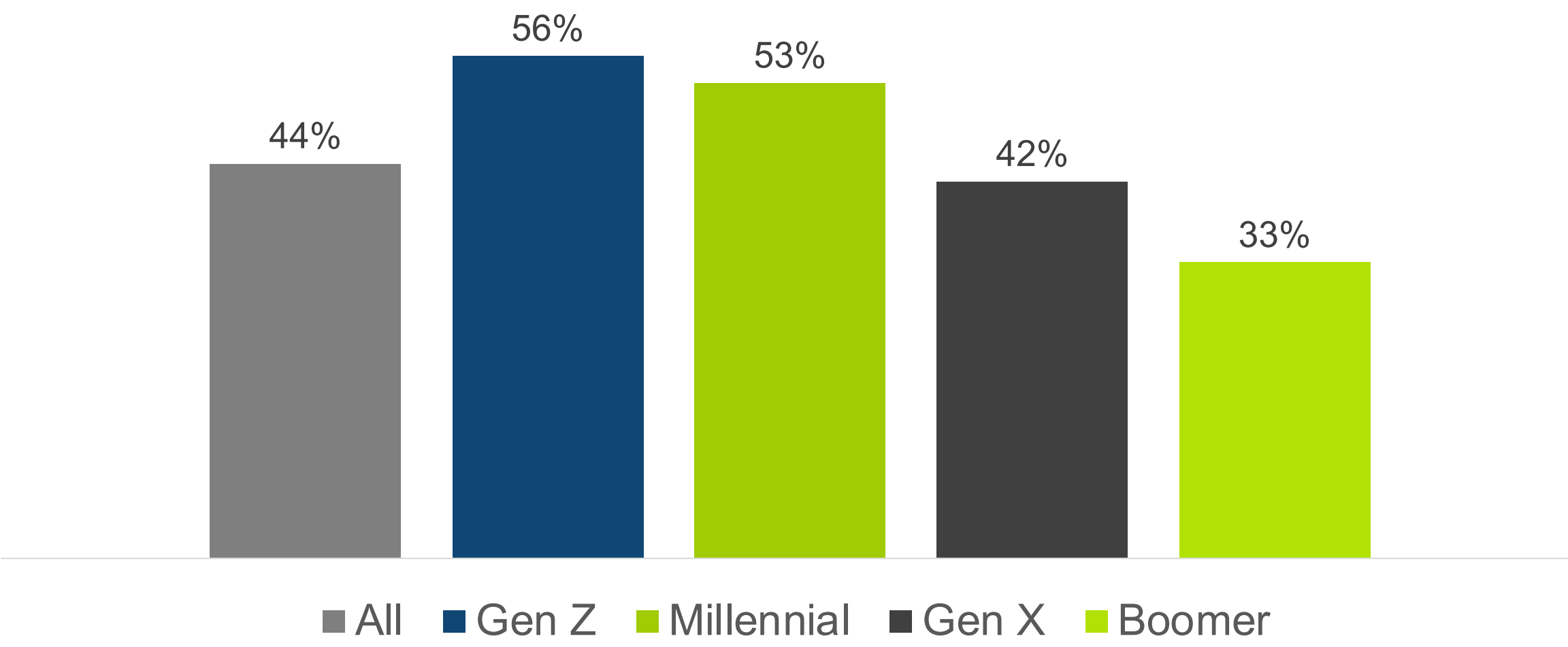
Preference for business meetings online vs. in-person



Do you prefer to do business meetings online or in-person?

44% of respondents have held a social gathering online rather than in person.

% Who have had a social gathering using video conferencing rather than in-person

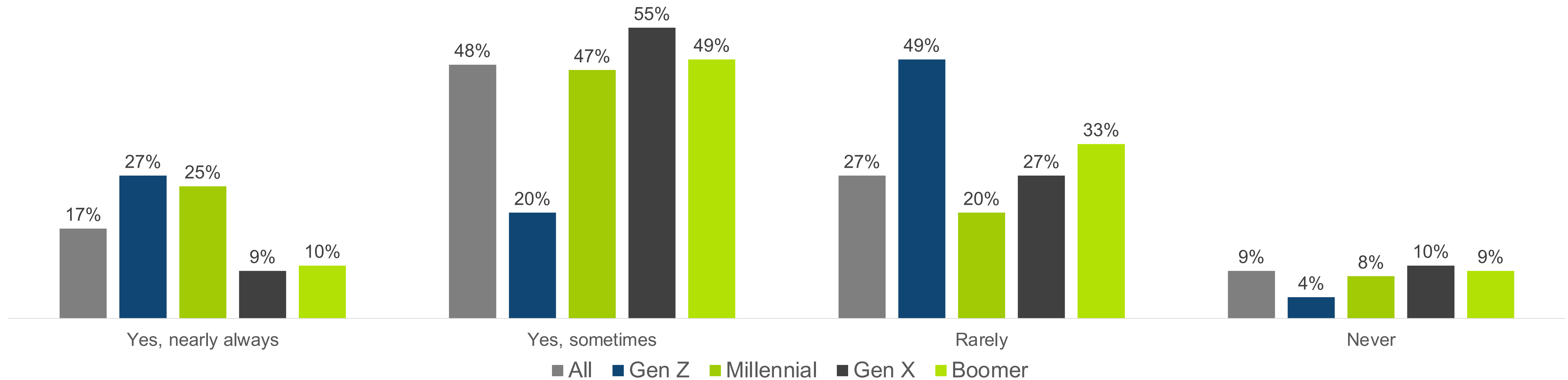


As a result of COVID have you had any social gatherings using video conferencing rather than in-person?



Of those who've had online social engagements, only 17% feel the quality of conversation is as good as when they are in person.

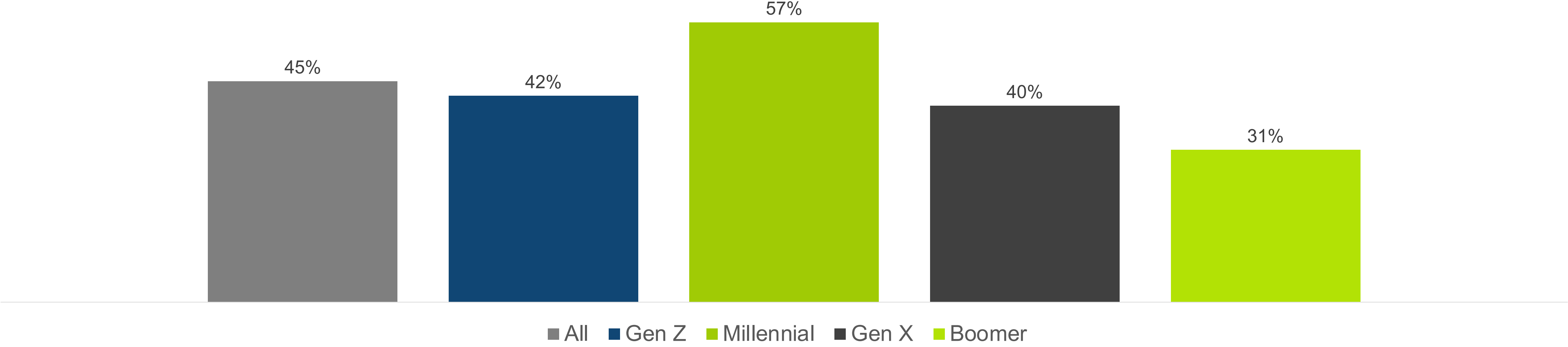
Quality of conversation for online social gatherings compared to in-person



Do you get the same quality of conversation in social gatherings online as you do when meeting in-person?

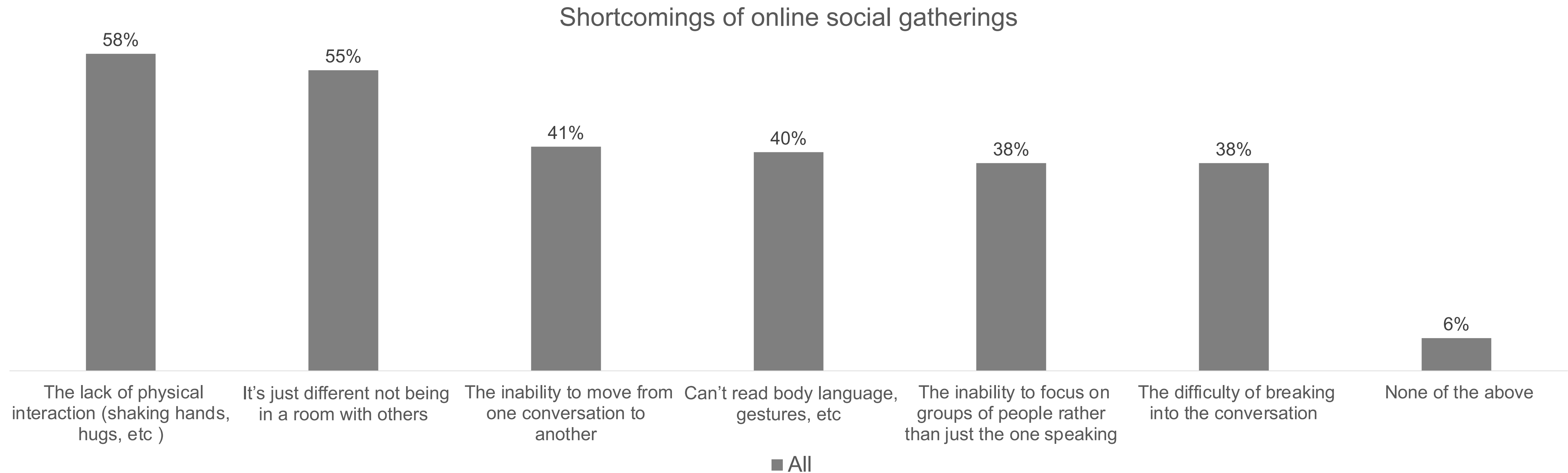
Given the perception of reduced communication quality, it's surprising that nearly half of the respondents (45%) find online gatherings as enjoyable as those that are in-person.

% Who find online social gatherings as enjoyable as in-person



Do you find online social gatherings as enjoyable as getting together in-person?

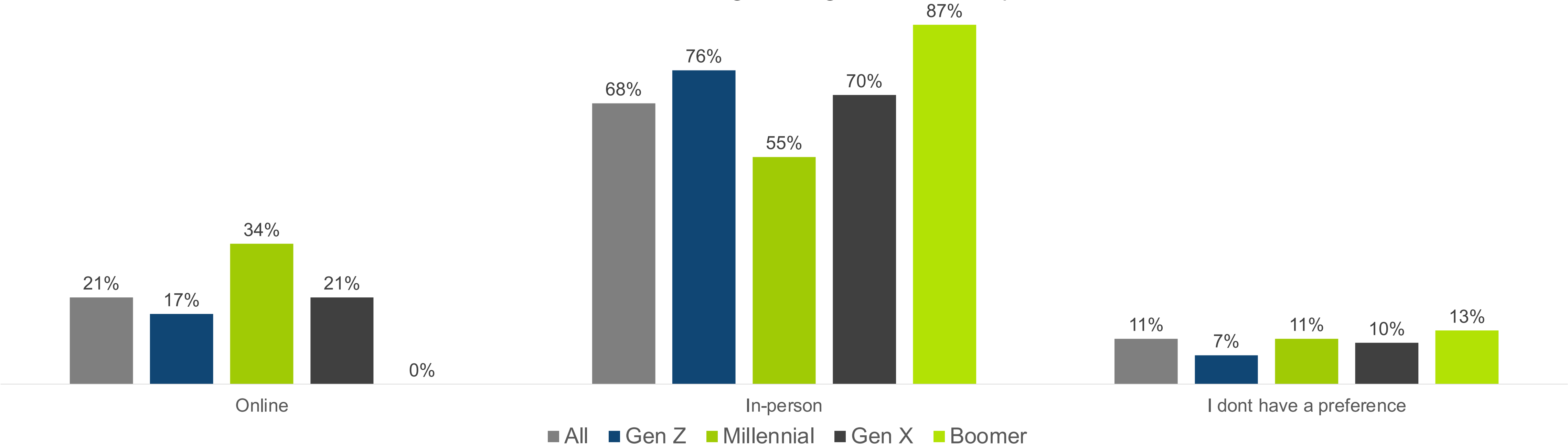
Only 6% of respondents feel there are no shortcomings of online social engagements. The remaining 94% find an average of 2.7 different issues.



Which of the following do you find as shortcomings of online social gatherings? Select all that apply.

Unlike business meetings where opinions about online vs. in person meetings were mixed, more than two-thirds of respondents prefer in-person social gatherings.

Preference for social gatherings online vs. in-person



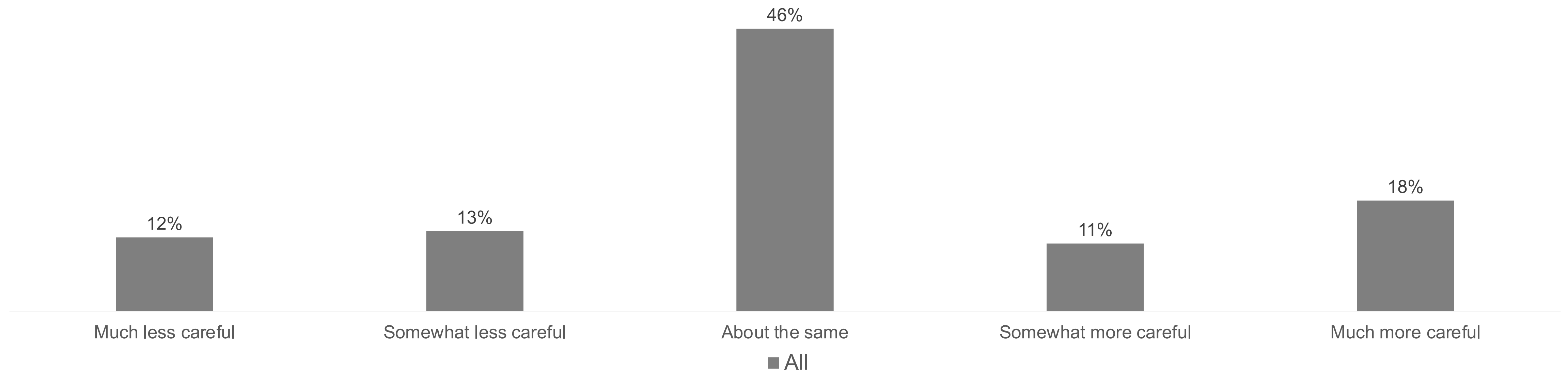
Do you prefer to do social gatherings online or in-person?

COVID-19



Nearly as many people (25%) are taking fewer precautions against COVID as are taking more precautions (29%) compared to a year ago.

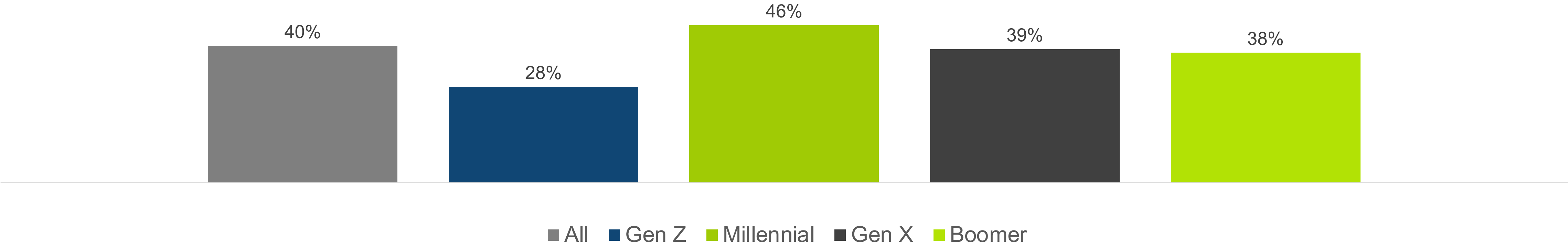
More/less careful about COVID now vs. a year ago



Are you more or less careful (wearing a mask, social distancing, etc.) about COVID now than you were a year ago?

Among those taking fewer precautions, 40% are doing so at least in part because of confidence in their immunity.

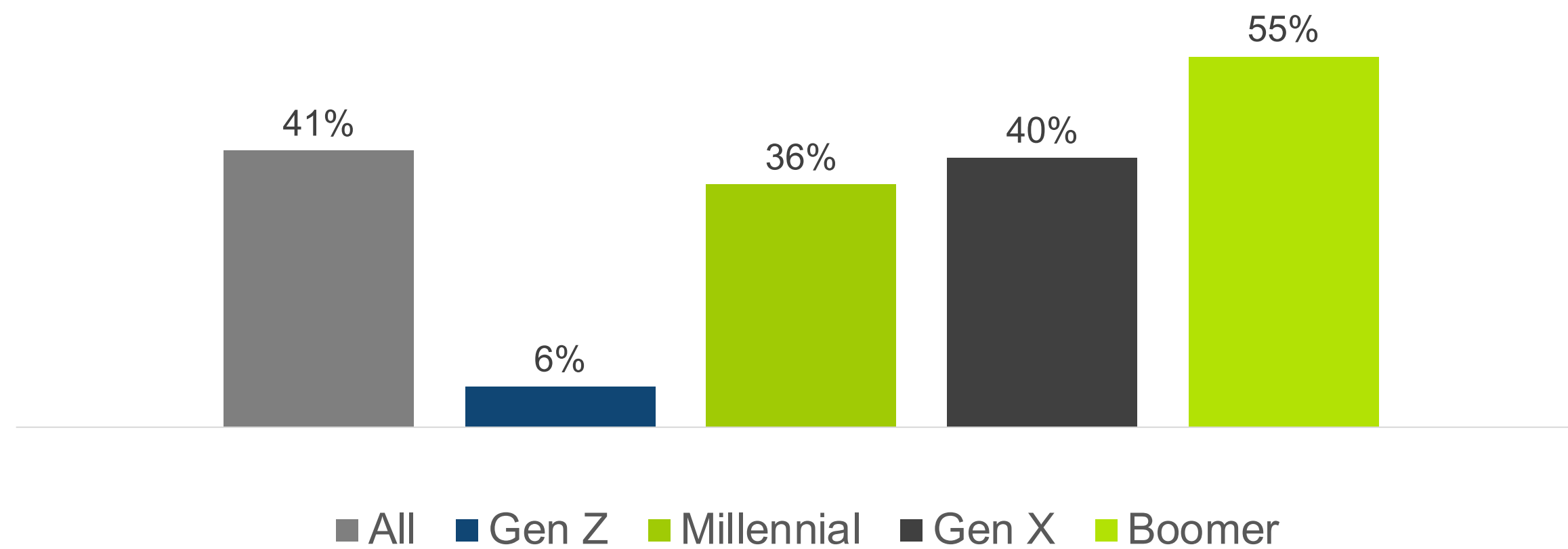
% Who say they are confident in the immunity they have developed because of vaccination or prior infection on their decision to be less cautious



How influential are the following on your decision to be less cautious about COVID?

For 41% their lower level of precaution is influenced by less concern about the Omicron variant.

% Who say they view the Omicron variant as less of a risk on their decision to be less cautious

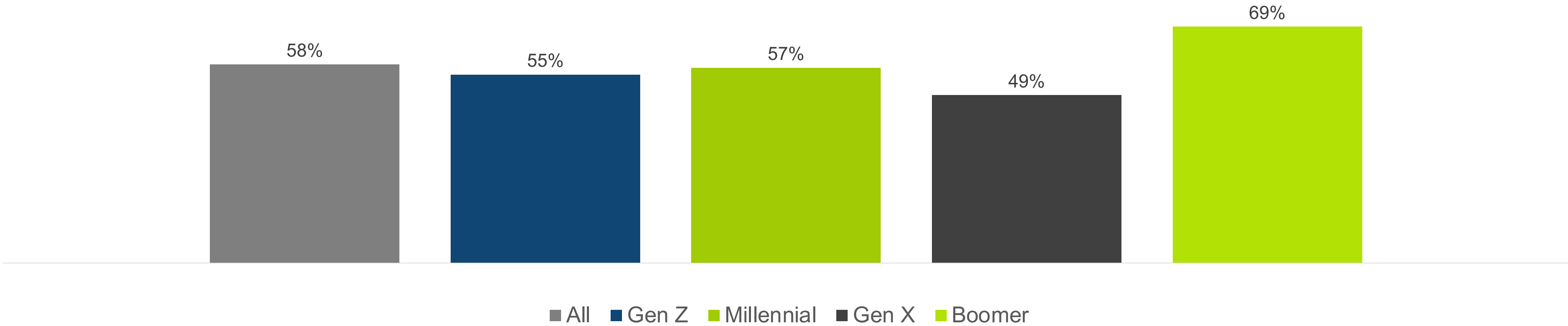


How influential are the following on your decision to be less cautious about COVID?



The most commonly cited reason (58%) for fewer precautions is general fatigue with the whole process and a desire to get life back to normal.

% Who say they are tired of all the restrictions and want their life back to normal on their decision to be less cautious



How influential are the following on your decision to be less cautious about COVID?

Summary

Purchase Online for Pick Up at Store

- Nearly two-thirds (65%) of respondents have made online purchases for pick up at the store in the past year.
- Of the 65% who have made purchases online for pickup, 41% adopted the process after the arrival of COVID.
- The most popular categories for online purchase and store pickup are groceries (69%) and clothing (45%).
- 61% of the respondents using the service have one or more categories they would not purchase online for pickup.
- Of those who order online for store pickup, a significant majority (77%) enter the store at least occasionally.
 - Boomers (41%) are far and away the most likely to never go into the store.
- Getting people out of their cars and into the stores benefits the retailer as 69% indicate making additional purchases.
- More than one person in three (35%) have changed a store allegiance because of a preference for another retailer's online ordering/pickup system.
- More people (40%) expect their online purchases for store pickup to decline post COVID than those who expect them to increase (13%).

Summary

In Person vs. Video Conference

- 57% of employed respondents have had some business dealings via online conferencing during COVID.
- Only 33% feel that video conferencing is nearly always as productive as in-person meetings.
- Despite the reduced productivity, 60% of those who've used video conferencing for business find that they enjoy it.
- Only 12% of respondents find no shortcomings in business video conferencing. The other 88% have an average of 2.5 items they don't care for.
- In person meetings are preferred by 43% of respondents while online is preferred by 31%. 26% have no preference.
- 44% of respondents have held a social gathering online rather than in person.
- Of those who've had online social engagements, only 17% feel the quality of conversation is as good as when they are in person.
- Given the perception of reduced communication quality, it's surprising that nearly half of the respondents (45%) find online gatherings as enjoyable as those that are in-person.

Summary

In Person vs. Video Conference – cont.

- Only 6% of respondents feel there are no shortcomings of online social engagements. The remaining 94% find an average of 2.7 different issues.
- Unlike business meetings where opinions about online vs. in person meetings were mixed, more than two-thirds of respondents prefer in-person social gatherings.

Summary

COVID-19

- Nearly as many people (25%) are taking fewer precautions against COVID as are taking more precautions (29%) compared to a year ago.
- Among those taking fewer precautions, 40% are doing so at least in part because of confidence in their immunity.
- For 41% their lower level of precaution is influenced by less concern about the Omicron variant.
- The most commonly cited reason (58%) for fewer precautions is general fatigue with the whole process and a desire to get life back to normal.