THE POST-COVID ONLINE SHOPPER: NEW CHALLENGES AND OPPORTUNITIES

SPECIAL ACTIVATE VIEWPOINT

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Key Takeaways from Activate Consulting's Consumer Research on Post-COVID Online Shopping

Consumer Adoption: Although each is in a different stage of online adoption, all product categories analyzed — grocery, beauty/grooming, clothing — have experienced a permanent online shift as a result of COVID-19. Consumers aged 35+ will see the largest sustained growth in online penetration.

Car Shopping: COVID-19 has transformed car purchasing/leasing behaviors, with consumers moving both discovery and consideration online. Transactions will be slower to shift online until major auto shopping sites can offer a touchless end-to-end experience.

eCommerce Discovery: eCommerce discovery has forever changed as most consumers are starting their online shopping journey with specific retailers instead of search engines.

Purchasing with New Online Retailers: During COVID-19, a large share of consumers has been making purchases from online retailers that they had not bought from before; 90% or more plan to continue shopping with these new online retailers in the future. Consumer intent to try new online retailers continues to be high today, creating opportunities for both established and emerging online shopping destinations.

Delivery vs. Pickup: Across categories, delivery is the most popular way for consumers to receive their online purchases; in grocery, however, nearly half of consumers prefer curbside or in-store pickup.

Shopping Program Memberships: More than one-quarter of households signed up for a new paid shopping program membership during COVID-19. As a result, the average household now pays for 1.7 memberships. Most households plan to keep their new memberships.

Privacy Exchange: Within the new privacy-focused web, shoppers are willing to give online retailers access to their data in exchange for personalized benefits, such as better recommendations, rewards/discounts, and faster checkout.

Sources: Activate analysis, Activate COVID-19 Consumer Tech & Media Study May 2021 (n = 2,913)

THE POST-COVID ONLINE SHOPPER

- **GROWTH OUTLOOK FOR ONLINE SHOPPING**
- ECOMMERCE DISCOVERY
- DELIVERY VS. PICKUP
- PURCHASING WITH NEW ONLINE RETAILERS
- SHOPPING PROGRAM MEMBERSHIPS
- CONSUMER DATA SHARING ON THE PRIVACY-FOCUSED WEB
- ABOUT ACTIVATE

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To determine how consumers will shop online post-COVID, we conducted large-scale consumer research focused on four major product categories, each in a different stage of online adoption

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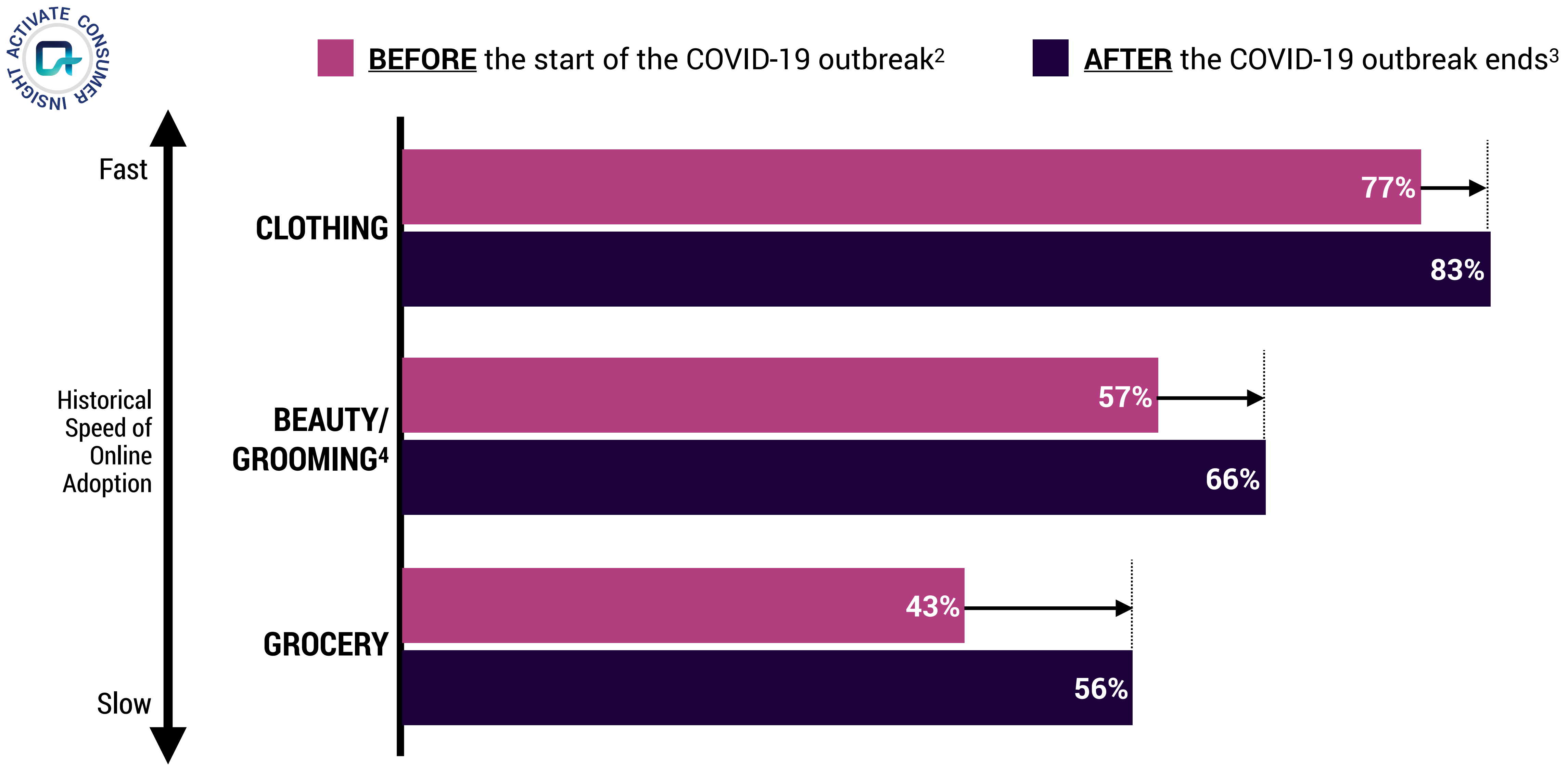
1. "Beauty/grooming" does not include personal care (e.g. deodorant, toothpaste, contact solution, q-tips, hand sanitizer).
Sources: Activate analysis, Activate COVID-19 Consumer Tech & Media Study May 2021 (n = 2,913)

Though in varying stages of online adoption, all categories have experienced a permanent online shift as a result of COVID-19

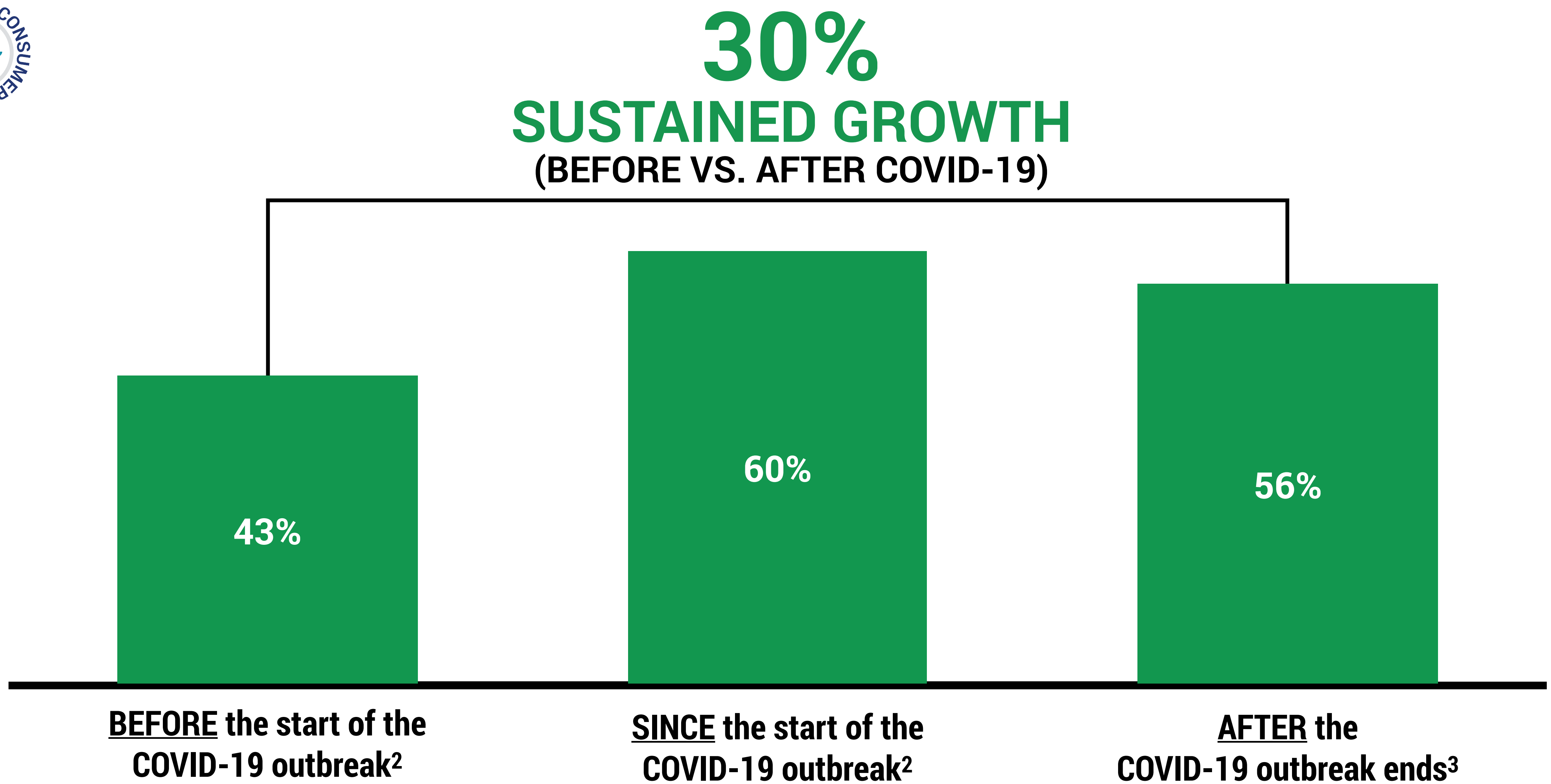
ONLINE SHOPPER PENETRATION BY PRODUCT CATEGORY AND TIME PERIOD, U.S., 2021,
% PURCHASERS IN THE PRODUCT CATEGORY[1] AGED 18+



1. "Purchasers in the product category" defined as consumers who purchase in the product category at least once per year. 2. "The start of the COVID-19 outbreak" defined as March 2020. 3. "After the COVID-19 outbreak ends" defined as the period after social distancing fully ends and all mask requirements are lifted. 4. "Beauty/grooming" does not include personal care (e.g. deodorant, toothpaste, contact solution, q-tips, hand sanitizer).
Sources: Activate analysis, Activate COVID-19 Consumer Tech & Media Study May 2021 (n = 2,913)

The percentage of online grocery shoppers has increased substantially during COVID-19; much of this increase will be sustained after the outbreak

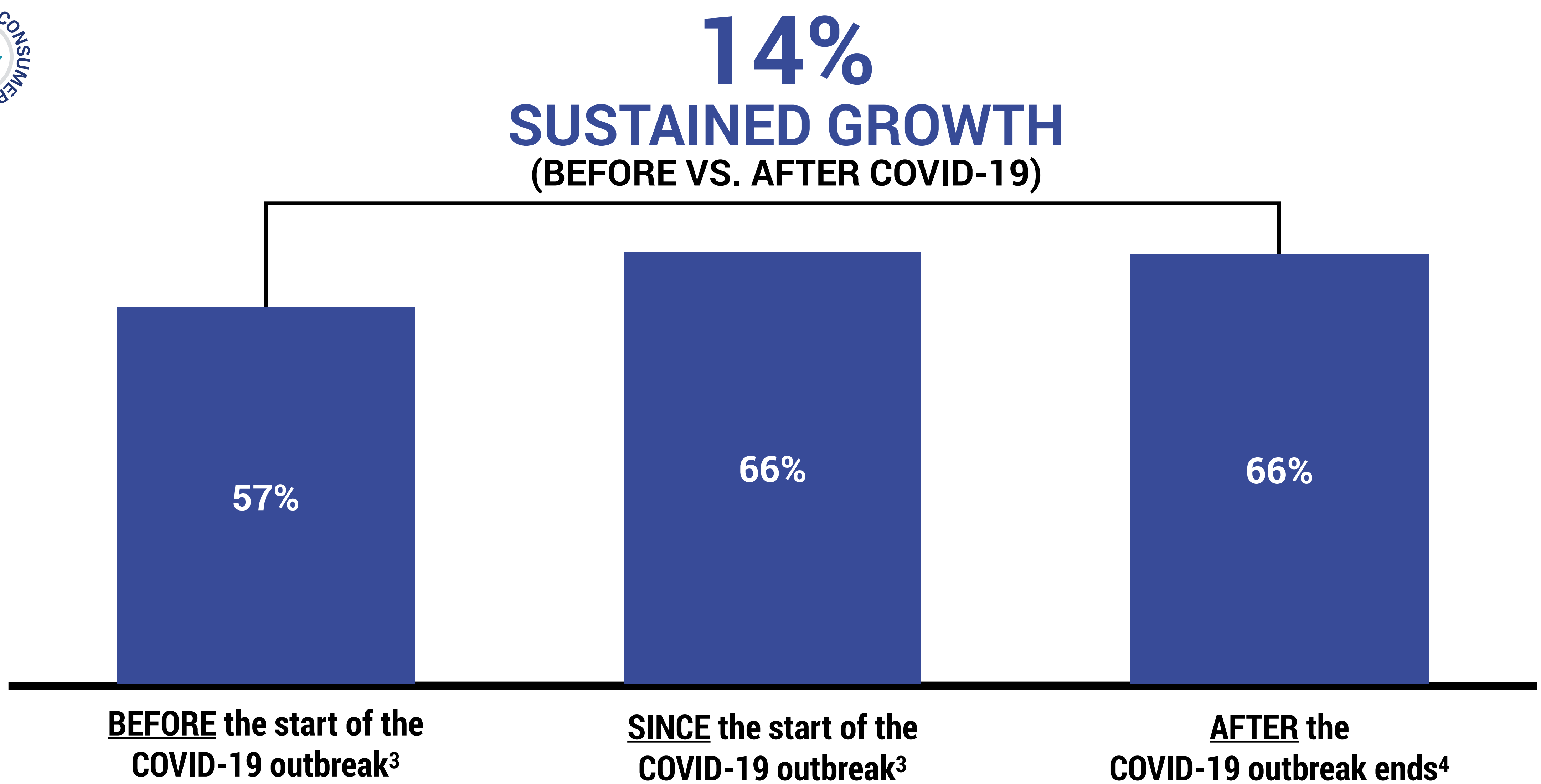
ONLINE GROCERY SHOPPER PENETRATION, U.S., 2021, % GROCERY PURCHASERS[1] AGED 18+



1. "Grocery purchasers" defined as consumers who purchase groceries at least once per year. 2. "The start of the COVID-19 outbreak" defined as March 2020. 3. "After the COVID-19 outbreak ends" defined as the period after social distancing fully ends and all mask requirements are lifted.
Sources: Activate analysis, Activate COVID-19 Consumer Tech & Media Study May 2021 (n = 2,913)

The share of consumers shopping online for beauty/grooming items has also risen; these new levels will be maintained

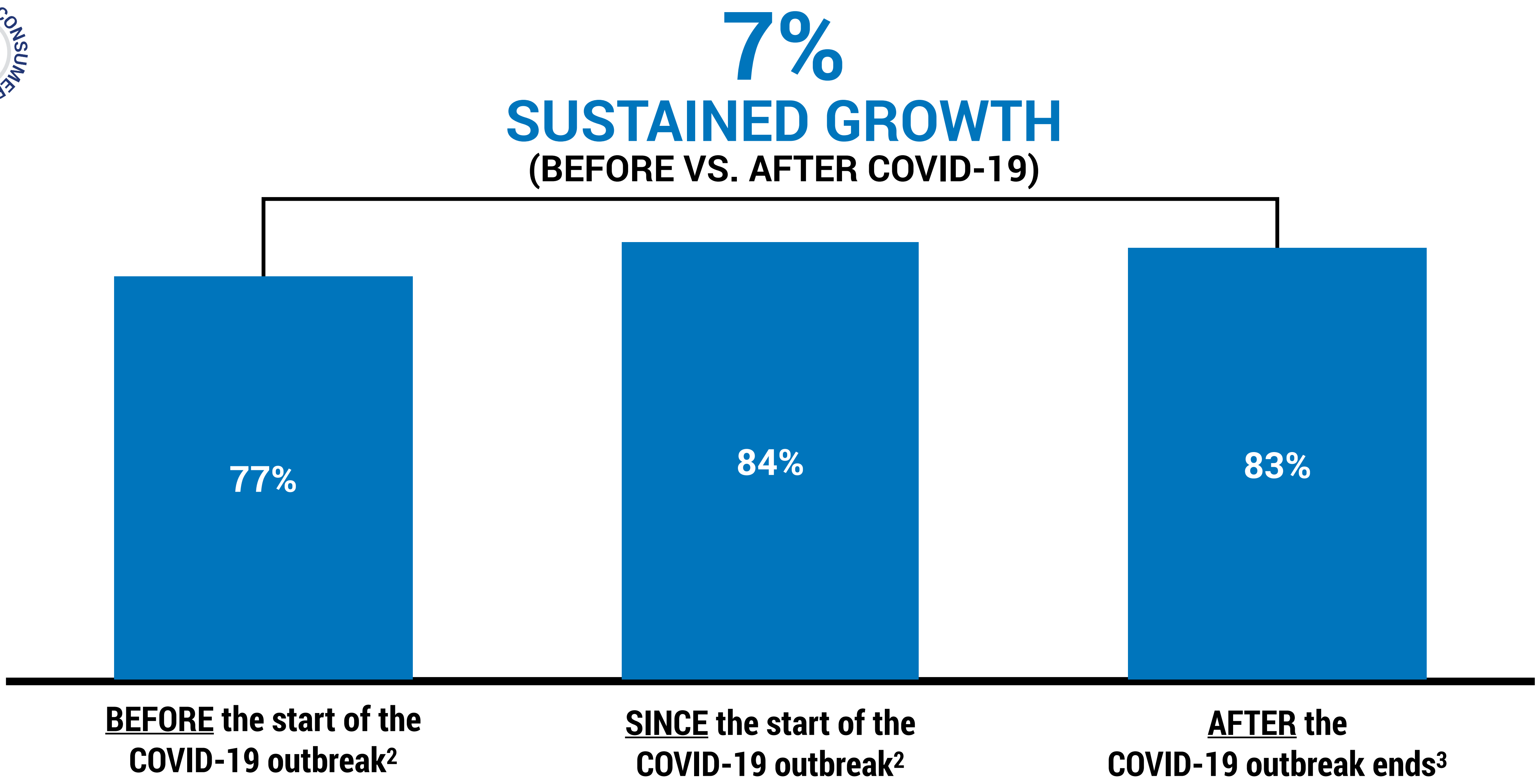
ONLINE BEAUTY/GROOMING[1] SHOPPER PENETRATION, U.S., 2021, % BEAUTY/GROOMING[1] PURCHASERS[2] AGED 18+



1. "Beauty/grooming" does not include personal care (e.g. deodorant, toothpaste, contact solution, q-tips, hand sanitizer).
2. "Beauty/grooming purchasers" defined as consumers who purchase beauty/grooming items at least once per year. 3. "The start of the COVID-19 outbreak" defined as March 2020. 4. "After the COVID-19 outbreak ends" defined as the period after social distancing fully ends and all mask requirements are lifted.
Sources: Activate analysis, Activate COVID-19 Consumer Tech & Media Study May 2021 (n = 2,913)

Though clothing already had a high level of online penetration, the category has still seen growth due to COVID-19

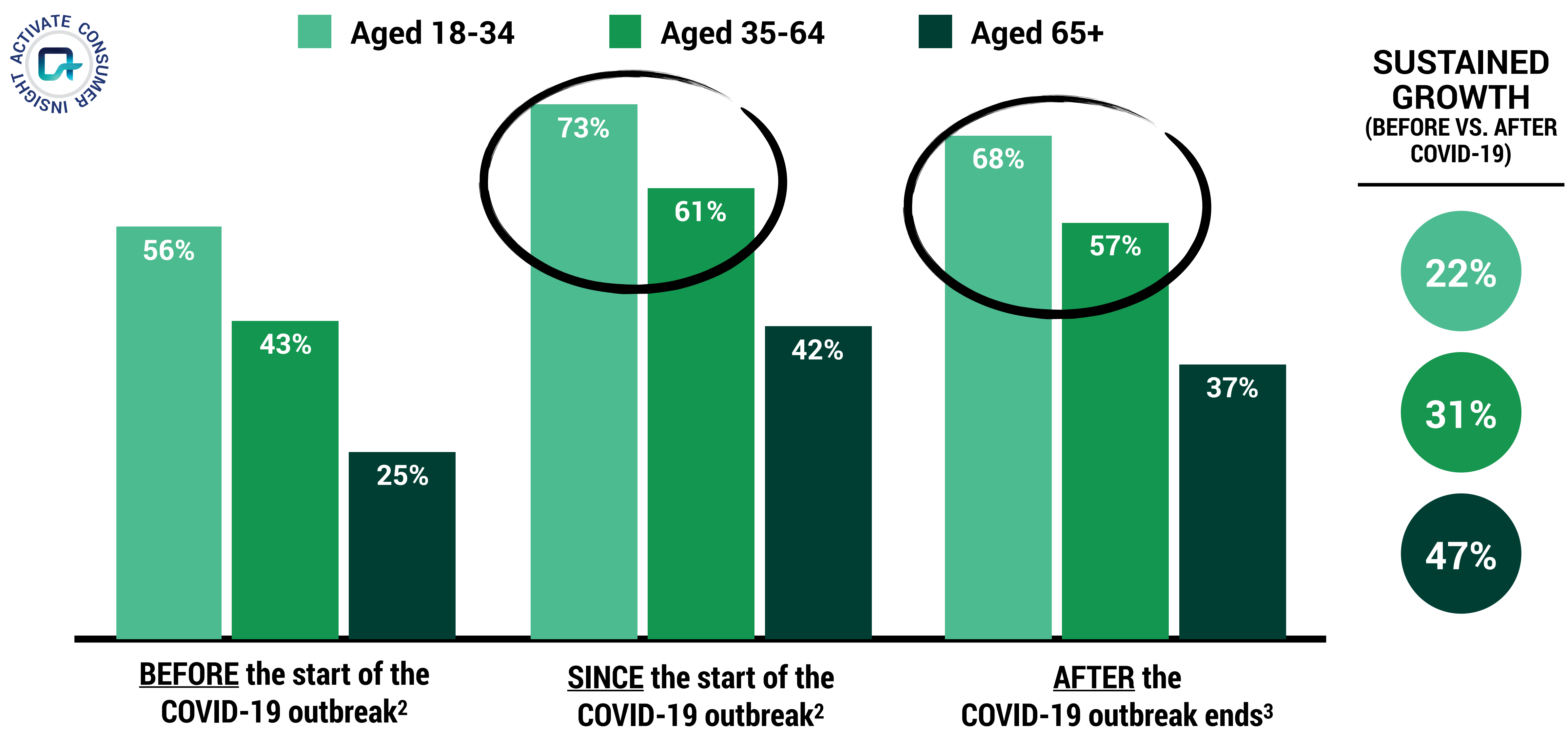
ONLINE CLOTHES SHOPPER PENETRATION, U.S., 2021, % CLOTHES PURCHASERS[1] AGED 18+



1. "Clothes purchasers" defined as consumers who purchase clothing at least once per year. 2. "The start of the COVID-19 outbreak" defined as March 2020. 3. "After the COVID-19 outbreak ends" defined as the period after social distancing fully ends and all mask requirements are lifted.
Sources: Activate analysis, Activate COVID-19 Consumer Tech & Media Study May 2021 (n = 2,913)

The majority of grocery purchasers under the age of 65 shop online today and expect to continue this behavior going forward

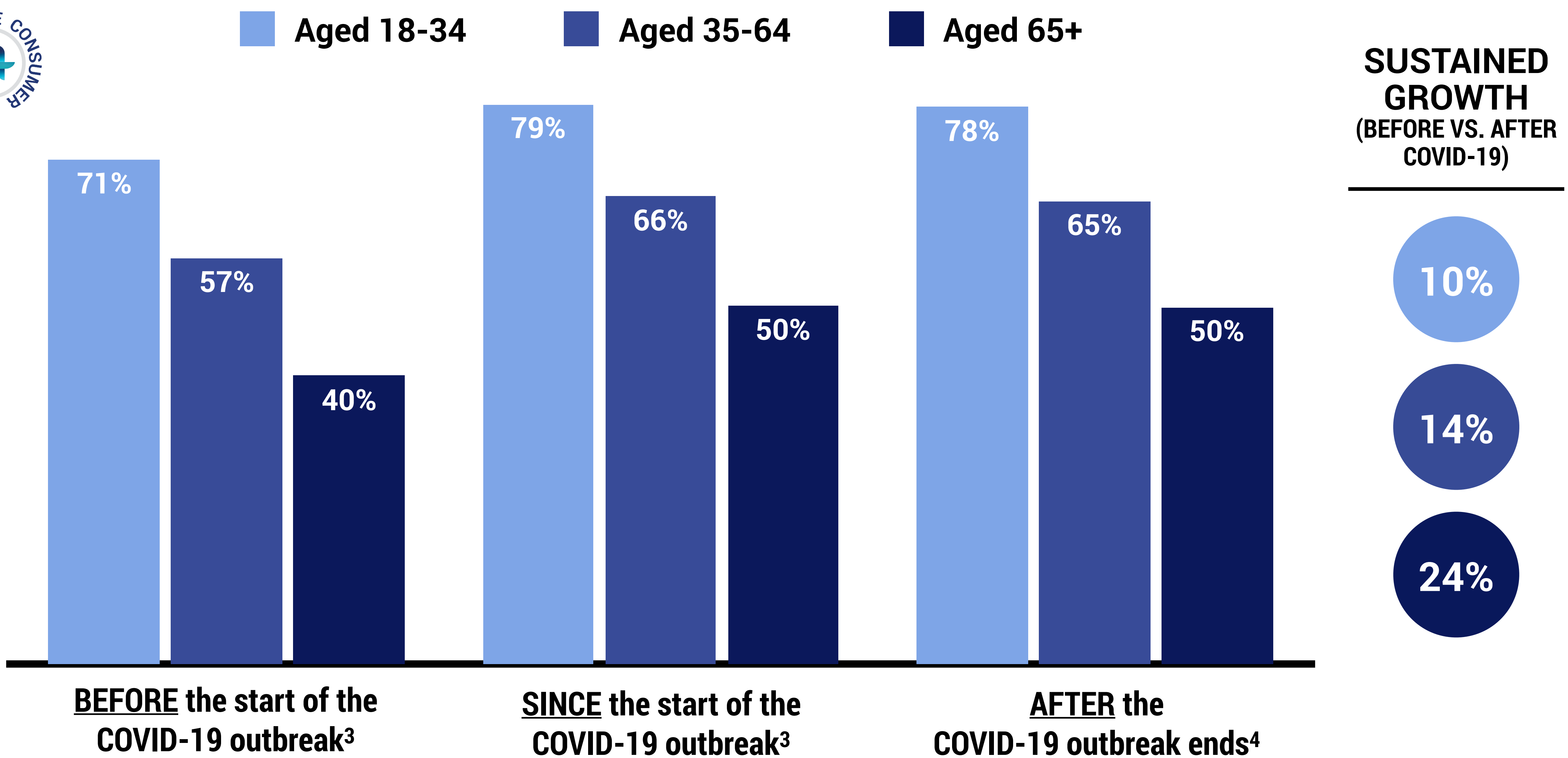
ONLINE GROCERY SHOPPER PENETRATION BY AGE GROUP, U.S., 2021, % GROCERY PURCHASERS[1] AGED 18+



1. "Grocery purchasers" defined as consumers who purchase groceries at least once per year. 2. "The start of the COVID-19 outbreak" defined as March 2020. 3. "After the COVID-19 outbreak ends" defined as the period after social distancing fully ends and all mask requirements are lifted.
Sources: Activate analysis, Activate COVID-19 Consumer Tech & Media Study May 2021 (n = 2,913)

For beauty/grooming, half or more of consumers in all age groups are now online shoppers

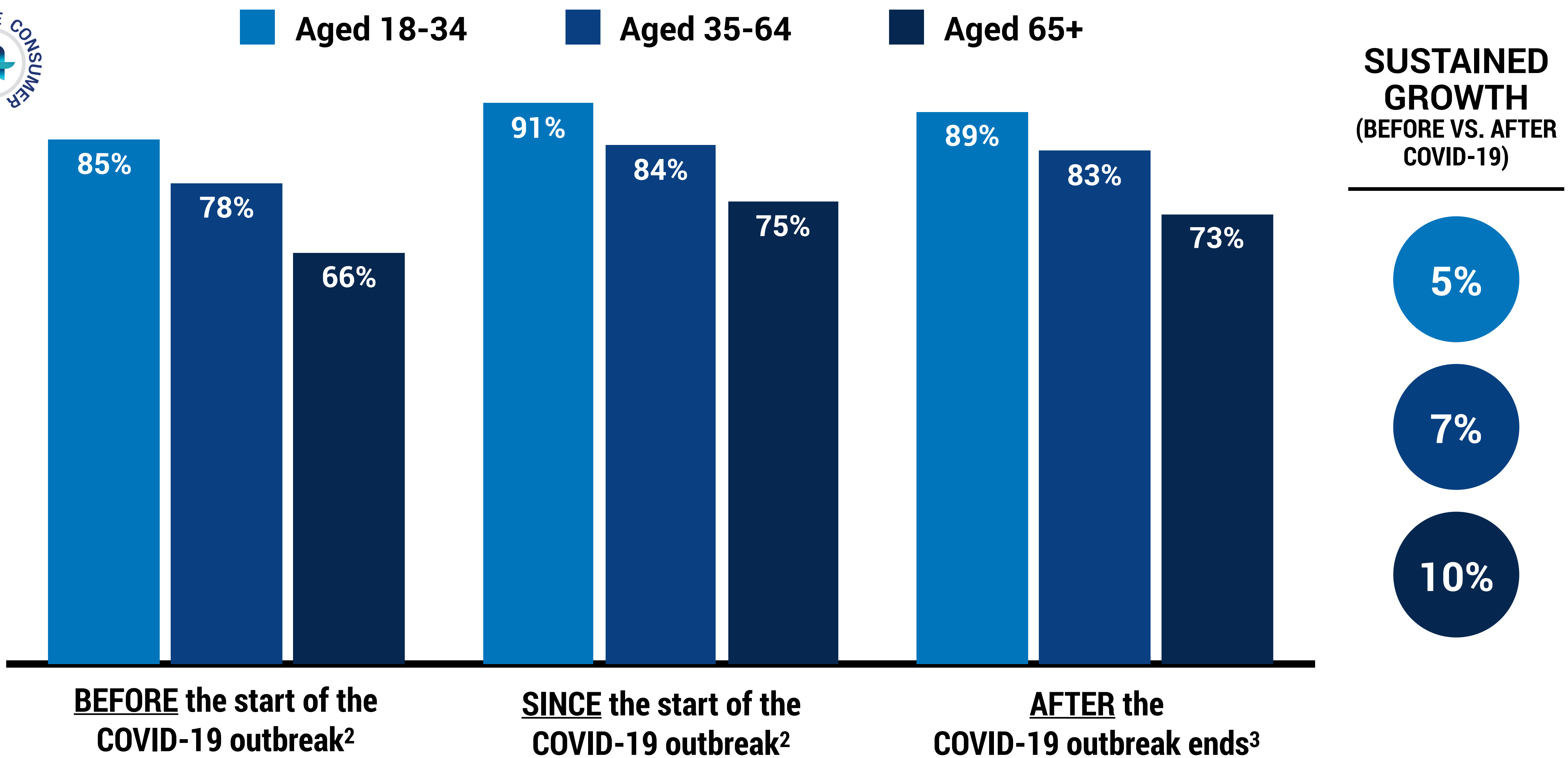
ONLINE BEAUTY/GROOMING[1] SHOPPER PENETRATION BY AGE GROUP, U.S., 2021, % BEAUTY/GROOMING[1] PURCHASERS[2] AGED 18+



1. "Beauty/grooming" does not include personal care (e.g. deodorant, toothpaste, contact solution, q-tips, hand sanitizer). 2. "Beauty/grooming purchasers" defined as consumers who purchase beauty/grooming items at least once per year. 3. "The start of the COVID-19 outbreak" defined as March 2020. 4. "After the COVID-19 outbreak ends" defined as the period after social distancing fully ends and all mask requirements are lifted.
Sources: Activate analysis, Activate COVID-19 Consumer Tech & Media Study May 2021 (n = 2,913)

Within clothing, all age groups have seen increased adoption of online shopping, despite an already high base

ONLINE CLOTHES SHOPPER PENETRATION BY AGE GROUP, U.S., 2021, % CLOTHES PURCHASERS[1] AGED 18+



1. "Clothes purchasers" defined as consumers who purchase clothing at least once per year. 2. "The start of the COVID-19 outbreak" defined as March 2020. 3. "After the COVID-19 outbreak ends" defined as the period after social distancing fully ends and all mask requirements are lifted.
Sources: Activate analysis, Activate COVID-19 Consumer Tech & Media Study May 2021 (n = 2,913)

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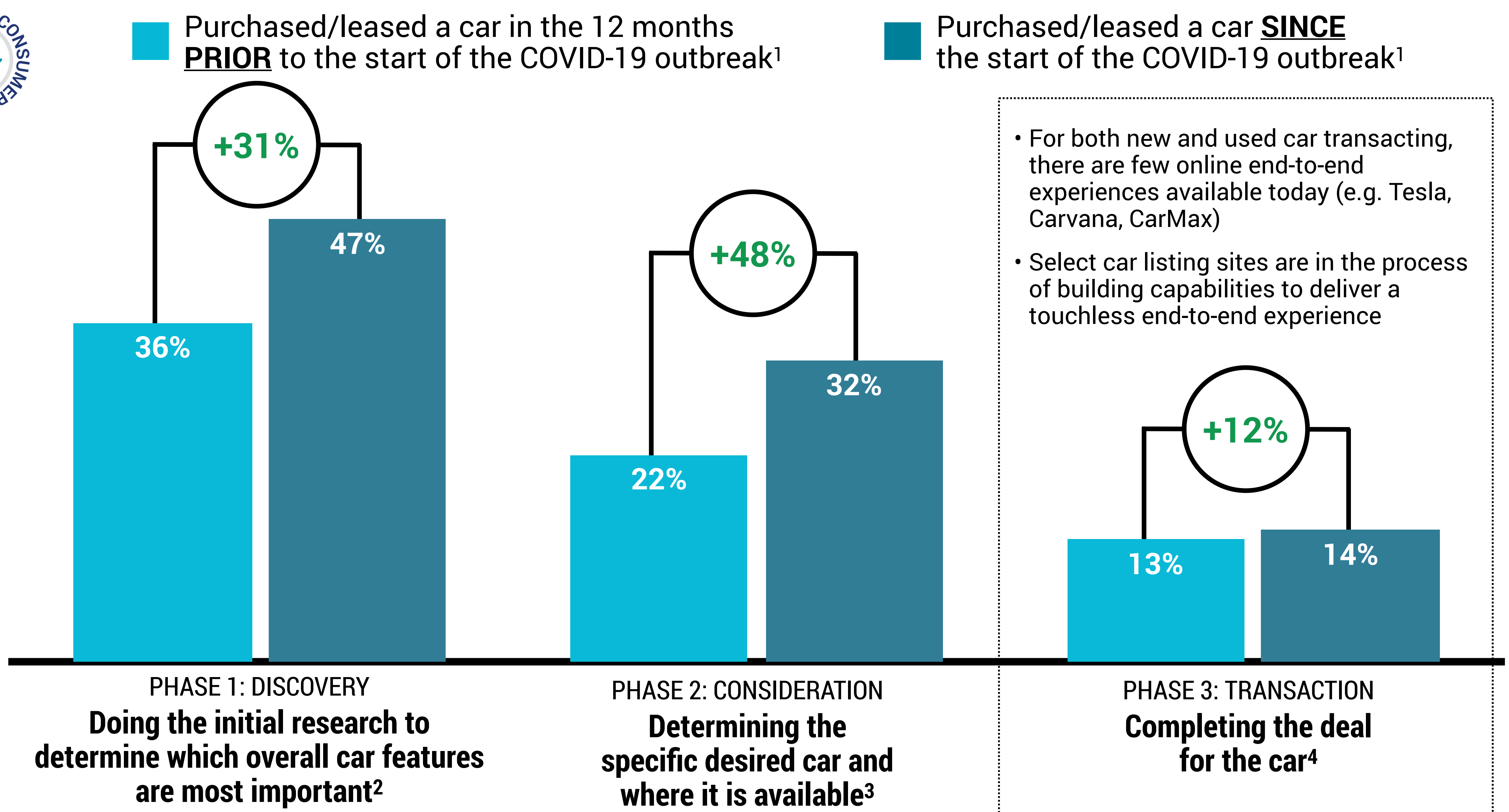
During COVID-19, consumers have been moving their car purchasing/leasing journey online; most of the shift has occurred within the discovery and consideration phases, as online options for transacting are limited

SHARE OF CONSUMERS WHO COMPLETED THE CAR PURCHASING/LEASING PHASE ENTIRELY ONLINE,
U.S., 2021, % ADULTS AGED 18+ WHO PURCHASED/LEASED A CAR DURING THE TIME PERIOD



- For both new and used car transacting, there are few online end-to-end experiences available today (e.g. Tesla, Carvana, CarMax)
- Select car listing sites are in the process of building capabilities to deliver a touchless end-to-end experience

1. "The start of the COVID-19 outbreak" defined as March 2020. 2. Examples include researching safety systems, gas-powered vs. electric, and all-wheel drive vs. front-wheel drive. 3. Examples include comparing specific makes/models and identifying which sellers have cars that match the consumer's needs. 4. Examples include negotiating the price/terms, signing the contract, and making / setting up payments.
Sources: Activate analysis, Activate COVID-19 Consumer Tech & Media Study May 2021 (n = 2,913), Company sites

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As a consequence of COVID-19 constraints, car purchasers and lessees transitioned from in-person to remote shopping

EFFECTS OF THE COVID-19 OUTBREAK ON CAR PURCHASING/LEASING,
U.S., 2021, % ADULTS AGED 18+ WHO PURCHASED/LEASED A CAR DURING THE COVID-19 OUTBREAK[1]

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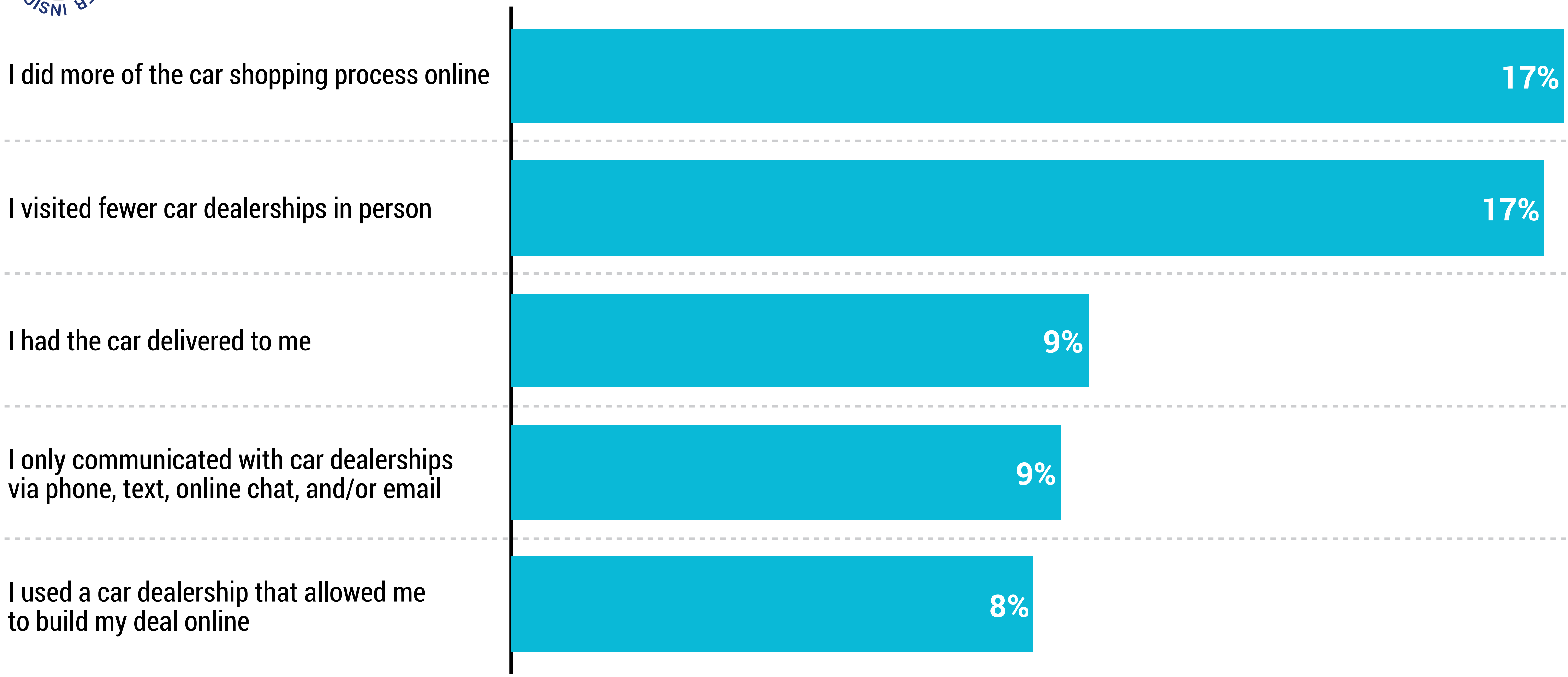
The COVID-19 outbreak had the following effect(s) on my car shopping process…



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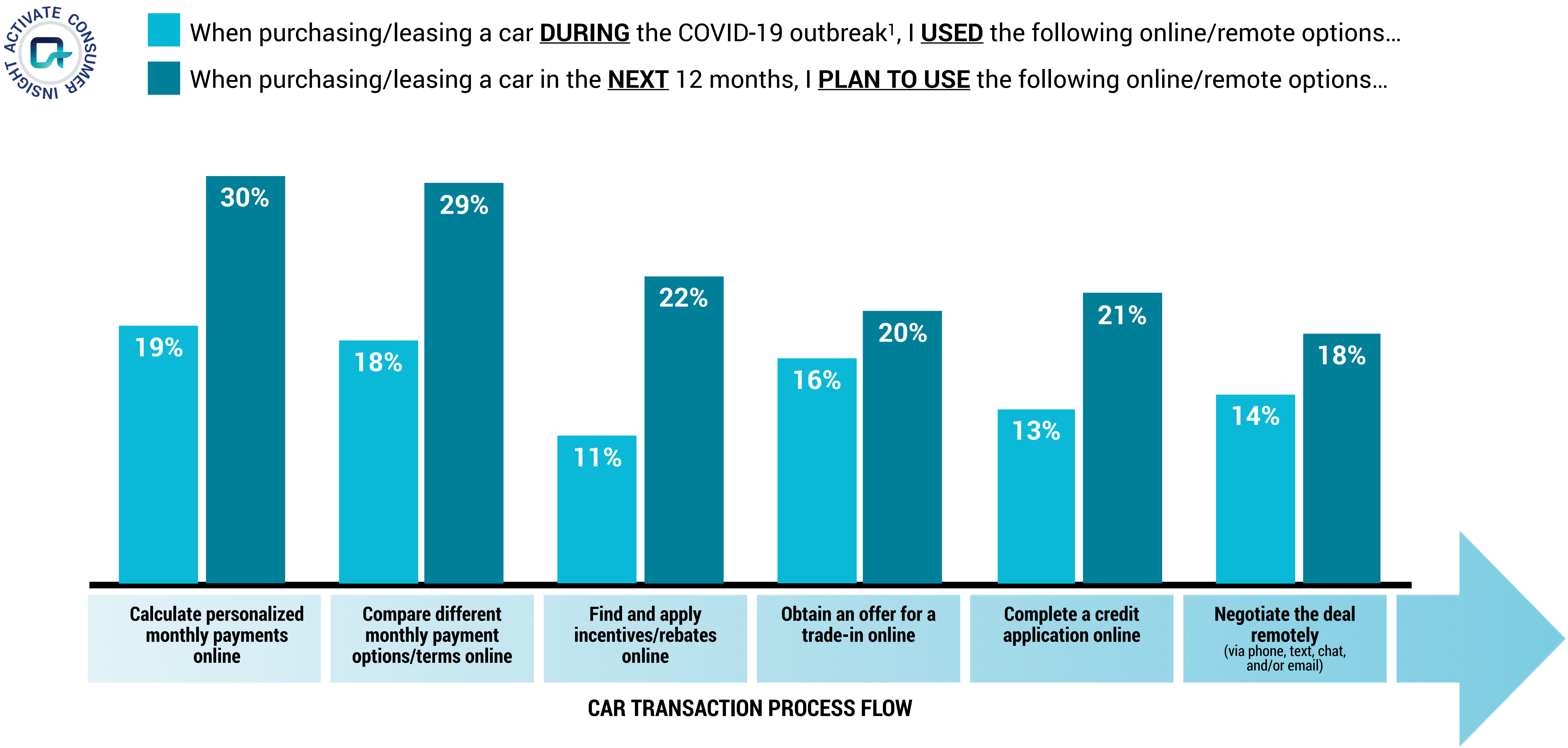
1. "During the COVID-19 outbreak" defined as the period since the start of the COVID-19 outbreak (i.e. since March 2020).
Sources: Activate analysis, Activate COVID-19 Consumer Tech & Media Study May 2021 (n = 2,913)

There is pent-up demand for touchless options to finalize car transactions; as more options become available, the adoption of online car shopping will further accelerate

USAGE VS. EXPECTED USAGE OF ONLINE/REMOTE CAR PURCHASING/LEASING OPTIONS, U.S., 2021,
% ADULTS AGED 18+ WHO PURCHASED/LEASED VS. PLAN TO PURCHASE/LEASE A CAR DURING THE TIME PERIOD



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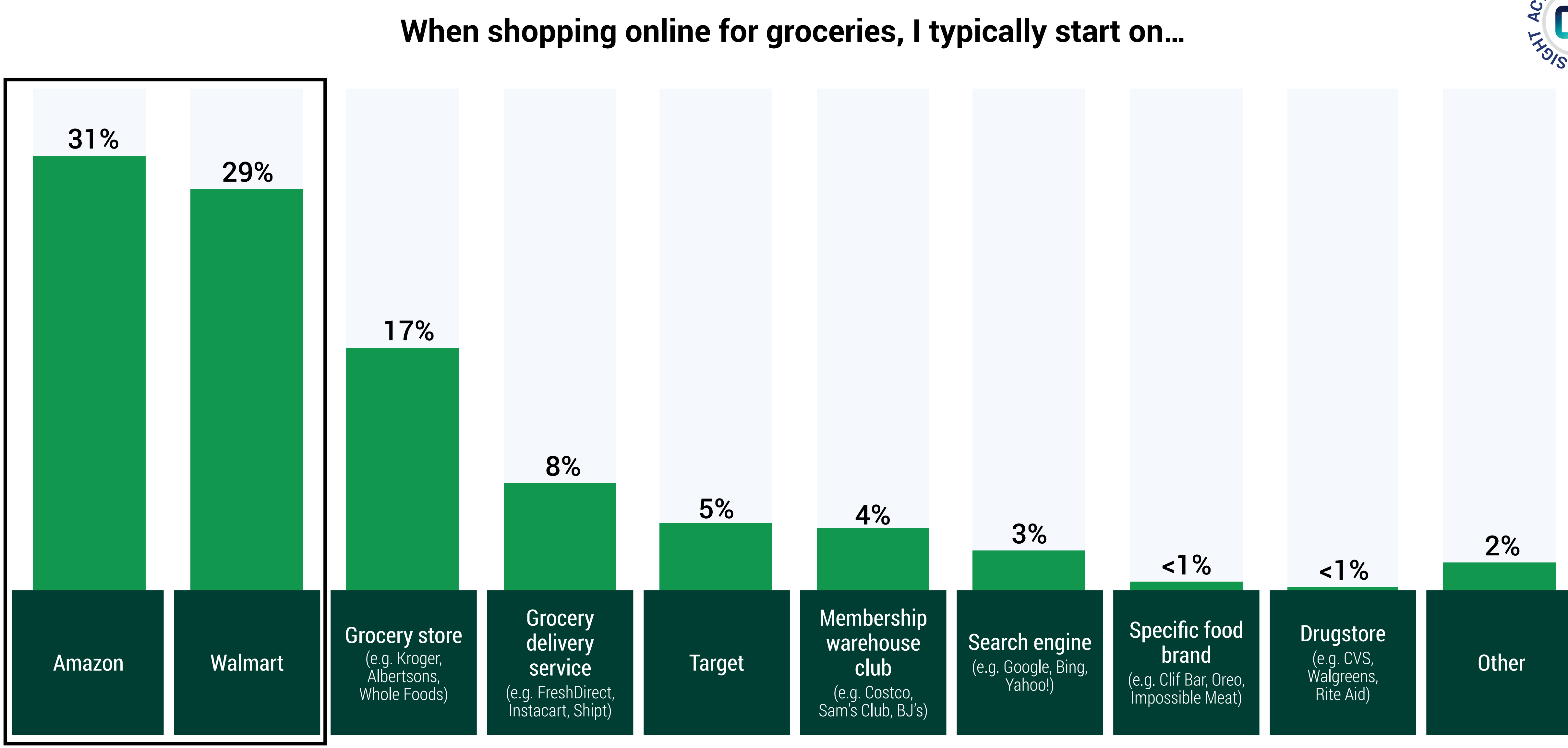
When shopping for groceries online, 60% of consumers typically start on Amazon or Walmart; search engines make up a very small percentage

FIRST WEBSITE/APP VISITED WHEN GROCERY SHOPPING ONLINE,
U.S., 2021, % ONLINE GROCERY SHOPPERS[1] AGED 18+

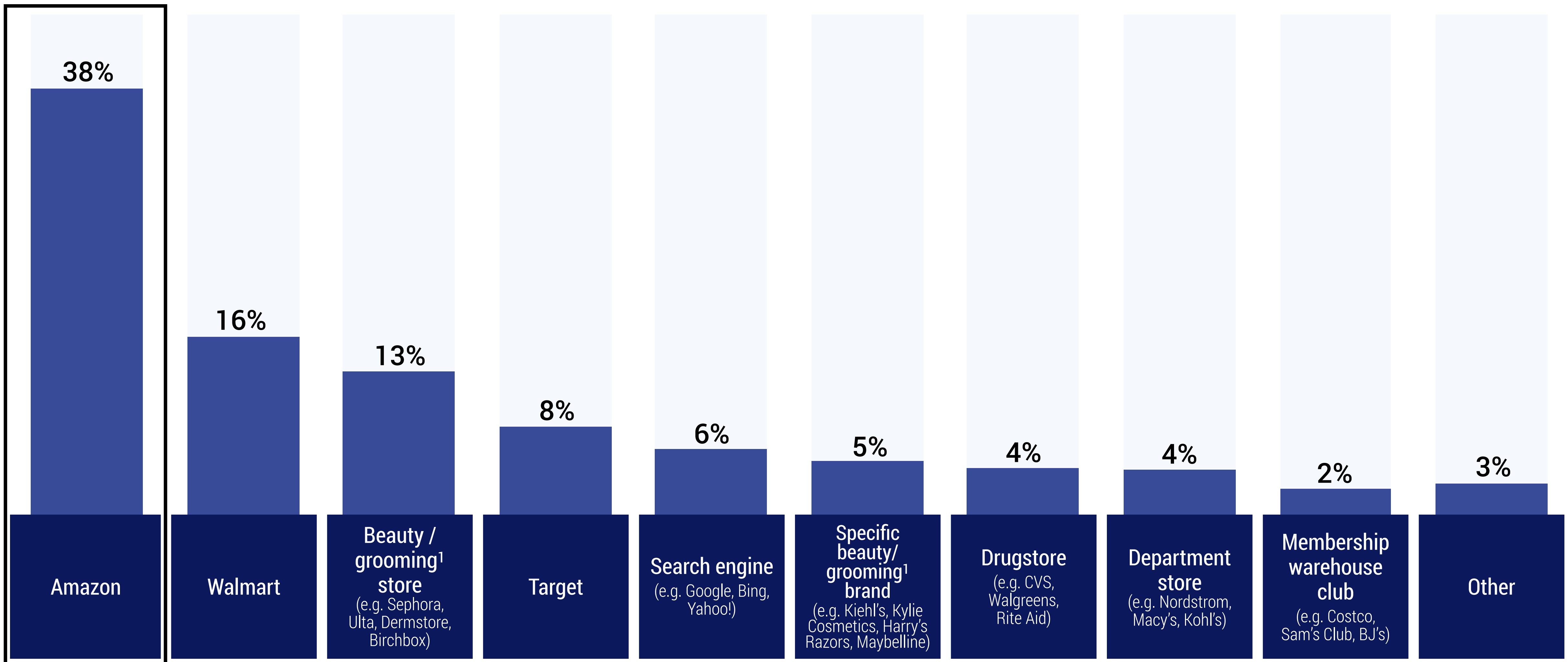


1. "Online grocery shoppers" defined as consumers who purchase groceries at least once per year and who have shopped online for groceries since the start of the COVID-19 outbreak (i.e. since March 2020).
Sources: Activate analysis, Activate COVID-19 Consumer Tech & Media Study May 2021 (n = 2,913)

Within beauty/grooming, Amazon is the dominant leader in online shopping discovery

FIRST WEBSITE/APP VISITED WHEN BEAUTY/GROOMING[1] SHOPPING ONLINE,
U.S., 2021, % ONLINE BEAUTY/GROOMING[1] SHOPPERS[2] AGED 18+

When shopping online for beauty/grooming[1] items, I typically start on…

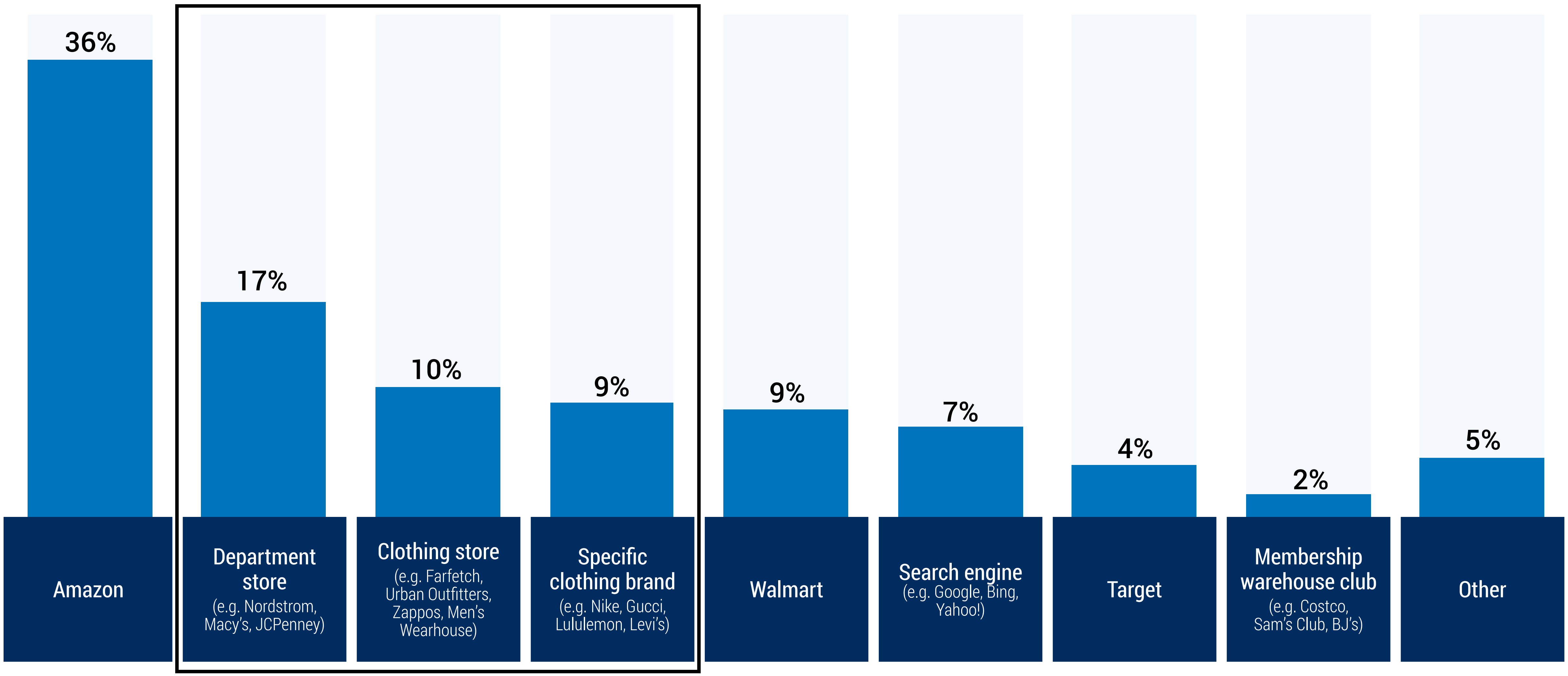


Note: Figures do not sum due to rounding. 1. "Beauty/grooming" does not include personal care (e.g. deodorant, toothpaste, contact solution, q-tips, hand sanitizer). 2. "Online beauty/grooming shoppers" defined as consumers who purchase beauty/grooming items at least once per year and who have shopped online for beauty/grooming items since the start of the COVID-19 outbreak (i.e. since March 2020).
Sources: Activate analysis, Activate COVID-19 Consumer Tech & Media Study May 2021 (n = 2,913)

For clothing, a large share of consumers are beginning their online shopping journey outside of Amazon; over one-third visit department stores, multi-brand clothing stores, or specific clothing brands first

FIRST WEBSITE/APP VISITED WHEN CLOTHES SHOPPING ONLINE,
U.S., 2021, % ONLINE CLOTHES SHOPPERS[1] AGED 18+

When shopping online for clothing, I typically start on…



Note: Figures do not sum due to rounding. 1. "Online clothes shoppers" defined as consumers who purchase clothing at least once per year and who have shopped online for clothing since the start of the COVID-19 outbreak (i.e. since March 2020).
Sources: Activate analysis, Activate COVID-19 Consumer Tech & Media Study May 2021 (n = 2,913)

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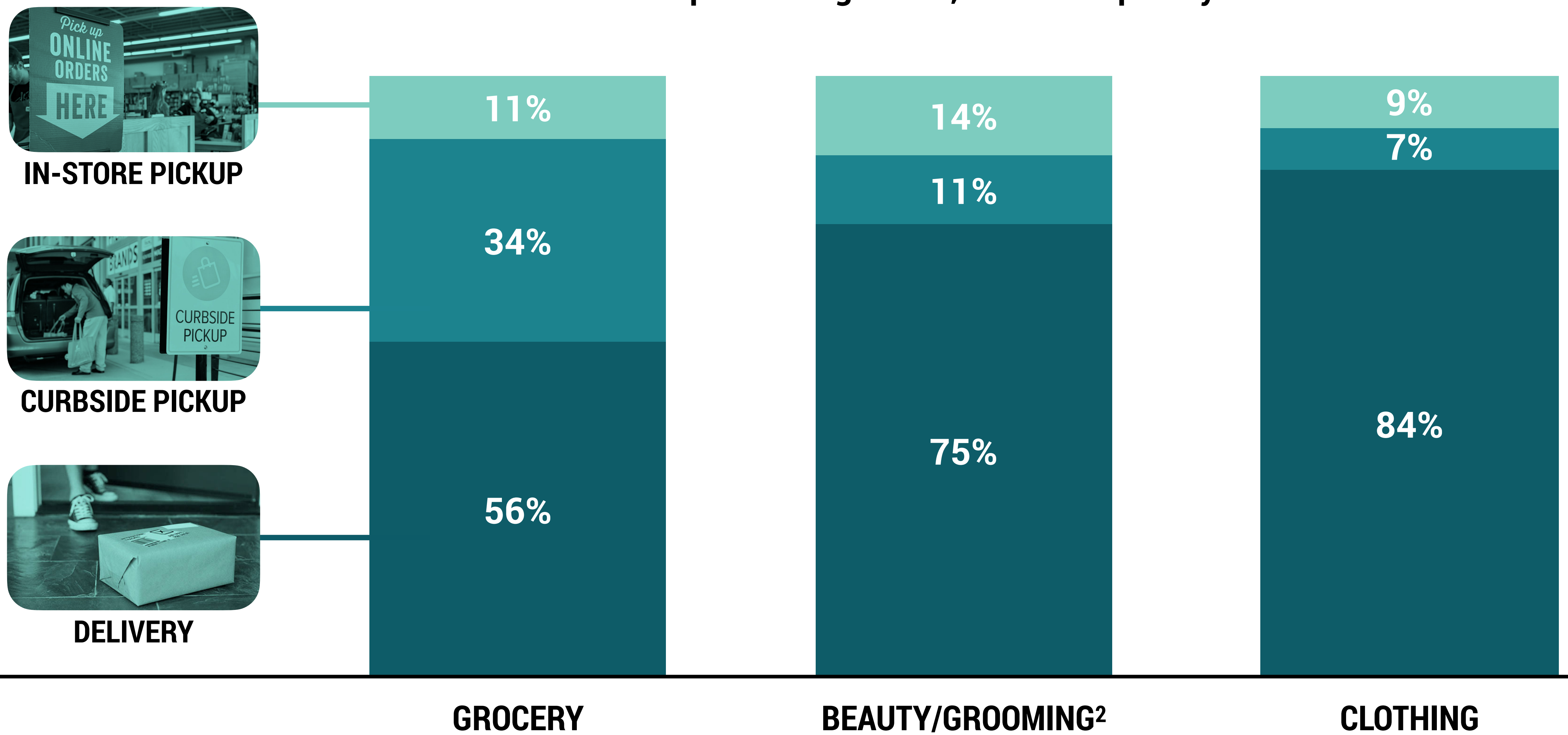
Delivery is the most popular way for consumers to receive their online purchases; in grocery, however, nearly half of consumers prefer curbside or in-store pickup

DELIVERY/PICKUP OPTION MOST FREQUENTLY USED FOR ONLINE PURCHASES BY PRODUCT CATEGORY,
U.S., 2021, % ONLINE PURCHASERS IN THE PRODUCT CATEGORY[1] AGED 18+

When purchasing online, I most frequently use…



Note: Figures do not sum due to rounding. 1. "Online purchasers in the product category" defined as consumers who have purchased in the product category online since the start of the COVID-19 outbreak (i.e. since March 2020). 2. "Beauty/grooming" does not include personal care (e.g. deodorant, toothpaste, contact solution, q-tips, hand sanitizer).
Sources: Activate analysis, Activate COVID-19 Consumer Tech & Media Study May 2021 (n = 2,913)

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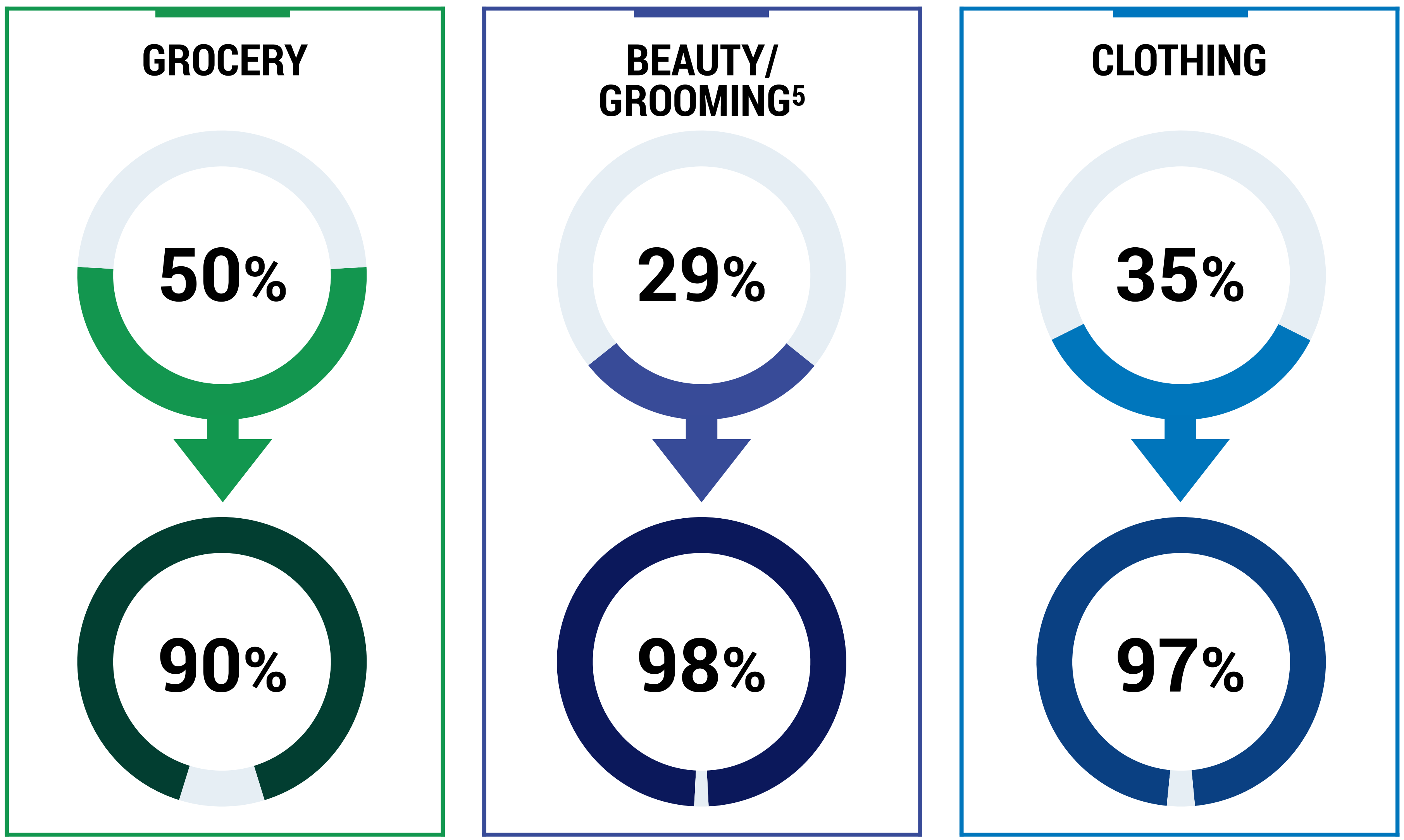
During COVID-19, consumers have been making purchases from online retailers that they had not bought from before; 90% or more plan to continue shopping with these new online retailers going forward

PURCHASING FROM NEW WEBSITES/APPS[1] DURING THE COVID-19 OUTBREAK[2] BY PRODUCT CATEGORY,
U.S., 2021, % ONLINE PURCHASERS IN THE PRODUCT CATEGORY[3] AGED 18+

Purchased from at least one new website/app[1] during the COVID-19 outbreak[2]

Plan to continue shopping with at least some of these new websites/apps[1] after the COVID-19 outbreak ends[4]



1. "New website/app" defined as a website/app from which the consumer had not previously purchased in the product category. 2. "During the COVID-19 outbreak" defined as the period since the start of the COVID-19 outbreak (i.e. since March 2020). 3. "Online purchasers in the product category" defined as consumers who have purchased in the product category online since the start of the COVID-19 outbreak (i.e. since March 2020). 4. "After the COVID-19 outbreak ends" defined as the period after social distancing fully ends and all mask requirements are lifted. 5. "Beauty/grooming" does not include personal care (e.g. deodorant, toothpaste, contact solution, q-tips, hand sanitizer).
Sources: Activate analysis, Activate COVID-19 Consumer Tech & Media Study May 2021 (n = 2,913)

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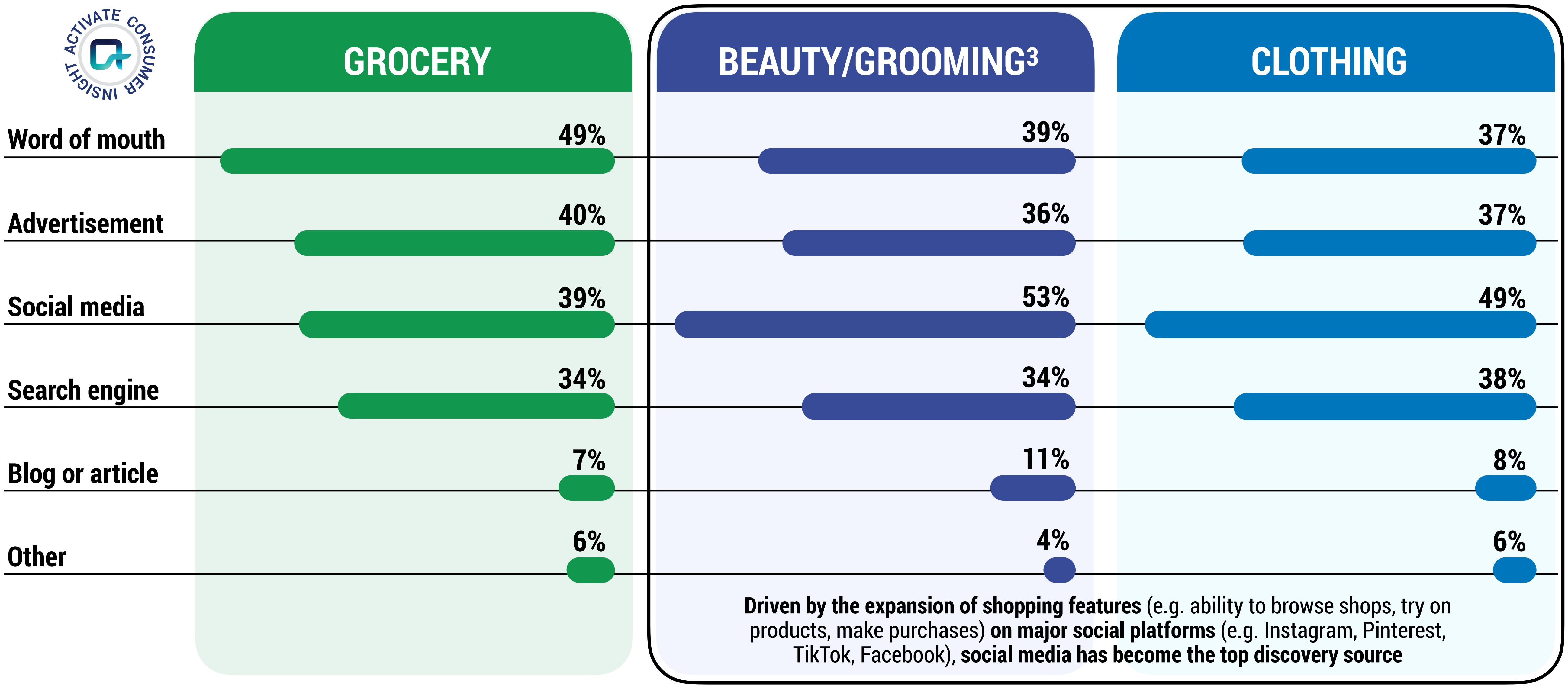
Consumers use different sources to find new online retailers based on the product category; social media is now the top choice for clothing and beauty/grooming, while word of mouth is most popular for grocery

SOURCES USED TO DISCOVER THE NEW WEBSITES/APPS[1] PURCHASED FROM DURING THE COVID-19 OUTBREAK[2] BY PRODUCT CATEGORY, U.S., 2021, % ADULTS AGED 18+ WHO PURCHASED IN THE PRODUCT CATEGORY FROM A NEW WEBSITE/APP[1] DURING THE COVID-19 OUTBREAK[2]



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Sources: Activate analysis, Activate COVID-19 Consumer Tech & Media Study May 2021 (n = 2,913)

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Across product categories, consumer intent to try new online retailers continues to be high today; roughly two-thirds are interested in finding more retailers for their online shopping

INTEREST IN FINDING NEW WEBSITES/APPS[1] FOR ONLINE SHOPPING BY PRODUCT CATEGORY,
U.S., 2021, % ONLINE SHOPPERS IN THE PRODUCT CATEGORY[2] AGED 18+

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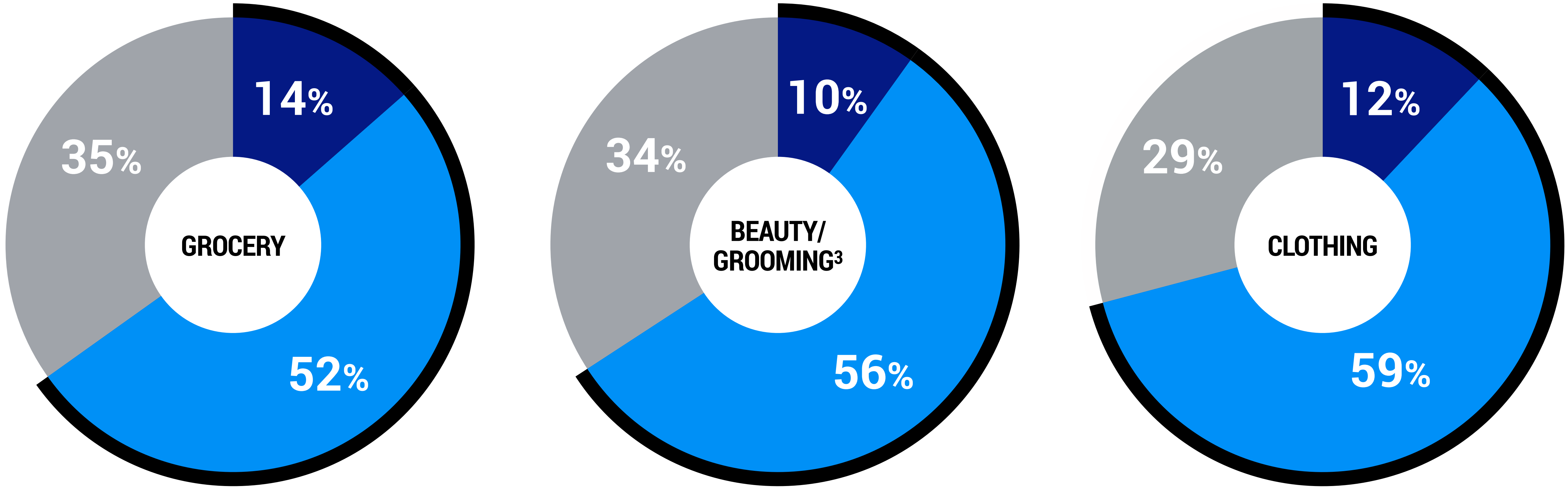
I am currently actively looking for new websites/apps[1] for my online shopping

I am currently open to trying new websites/apps[1] for my online shopping

I am currently not interested in trying new websites/apps[1] for my online shopping



Note: Figures do not sum due to rounding. 1. "New website/app" defined as a website/app from which the consumer has not previously purchased in the product category. 2. "Online shoppers in the product category" defined as consumers who purchase items in the product category at least once per year and who have shopped online for items in the product category since the start of the COVID-19 outbreak (i.e. since March 2020). 3. "Beauty/grooming" does not include personal care (e.g. deodorant, toothpaste, contact solution, q-tips, hand sanitizer).
Sources: Activate analysis, Activate COVID-19 Consumer Tech & Media Study May 2021 (n = 2,913)

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More than one-quarter of households signed up for a new paid shopping program membership during COVID-19; most plan to keep their new memberships

SIGNING UP FOR NEW PAID SHOPPING PROGRAM MEMBERSHIPS[1,2] DURING THE COVID-19 OUTBREAK[3] FOR SELECT MAJOR SHOPPING PROGRAMS, U.S., 2021, % HOUSEHOLDS

ACTIVATE CONSUMER INSIGHT

27%

of households signed up for a new paid shopping program membership[1,2] during the COVID-19 outbreak[3]

83%

plan to keep[4] at least one of these new paid shopping program memberships[1,2] over the next 12 months

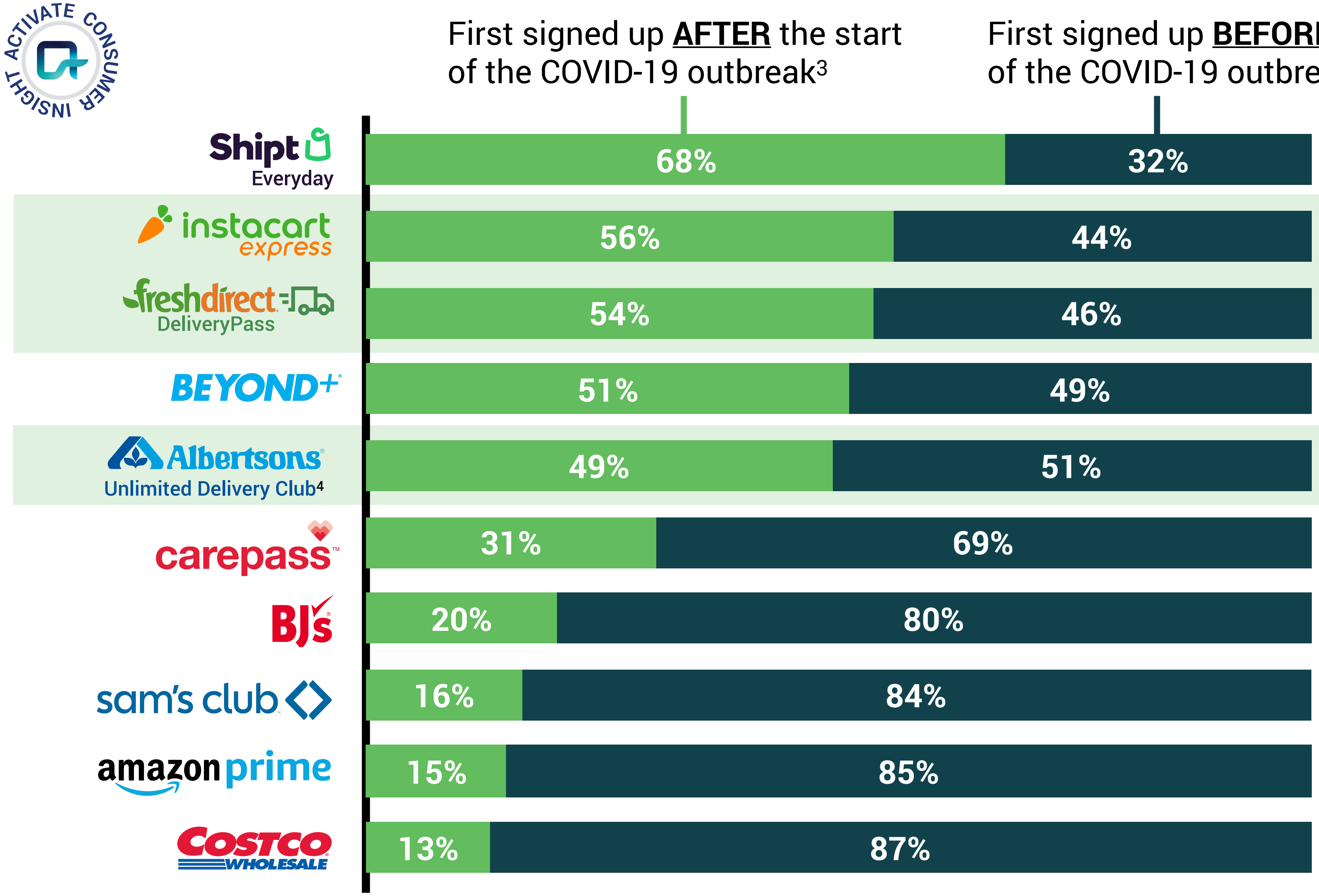
PAID SHOPPING PROGRAM MEMBERSHIPS[2] TESTED

amazon prime | Walmart+ | sam's club | Costco Wholesale | Albertsons Unlimited Delivery Club[5] | instacart express | Bed Bath & Beyond BEYOND+ | CVS carepass | BJ's | Shipt Everyday | freshdirect DeliveryPass

1. "New paid shopping program membership" defined as a paid shopping program membership for which the household had not previously signed up. 2. "Paid shopping program memberships" do not include free loyalty program memberships. 3. "During the COVID-19 outbreak" refers to the period since the start of the COVID-19 outbreak (i.e. since March 2020). 4. "Plan to keep" defined as definitely plan to keep or will likely keep. 5. Albertsons Unlimited Delivery Club has since been rebranded as Albertsons FreshPass.
Sources: Activate analysis, Activate COVID Consumer Tech & Media Study May 2021 (n = 2,913)

The paid membership bases of all of the major shopping programs have expanded during COVID-19

TIMING OF THE INITIAL SIGNUP FOR THE PAID SHOPPING PROGRAM MEMBERSHIP[1] BY SELECT MAJOR SHOPPING PROGRAMS[2],
U.S., 2021, % HOUSEHOLDS THAT PAY FOR A MEMBERSHIP TO THE SHOPPING PROGRAM



Grocery delivery services saw especially large growth during COVID-19 – roughly half of each service's current paid membership base was acquired after the start of the outbreak

1. "Paid shopping program memberships" do not include free loyalty program memberships. 2. Walmart+ not listed because the shopping program launched during the COVID-19 outbreak (September 2020). 3. "The start of the COVID-19 outbreak" defined as March 2020.
4. Albertsons Unlimited Delivery Club has since been rebranded as Albertsons FreshPass.
Sources: Activate analysis, Activate COVID-19 Consumer Tech & Media Study May 2021 (n = 2,913)

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As a result, 80% of households now pay for at least one shopping program membership

PAID SHOPPING PROGRAM MEMBERSHIP[1] HOUSEHOLD PENETRATION FOR SELECT MAJOR SHOPPING PROGRAMS, U.S., 2021

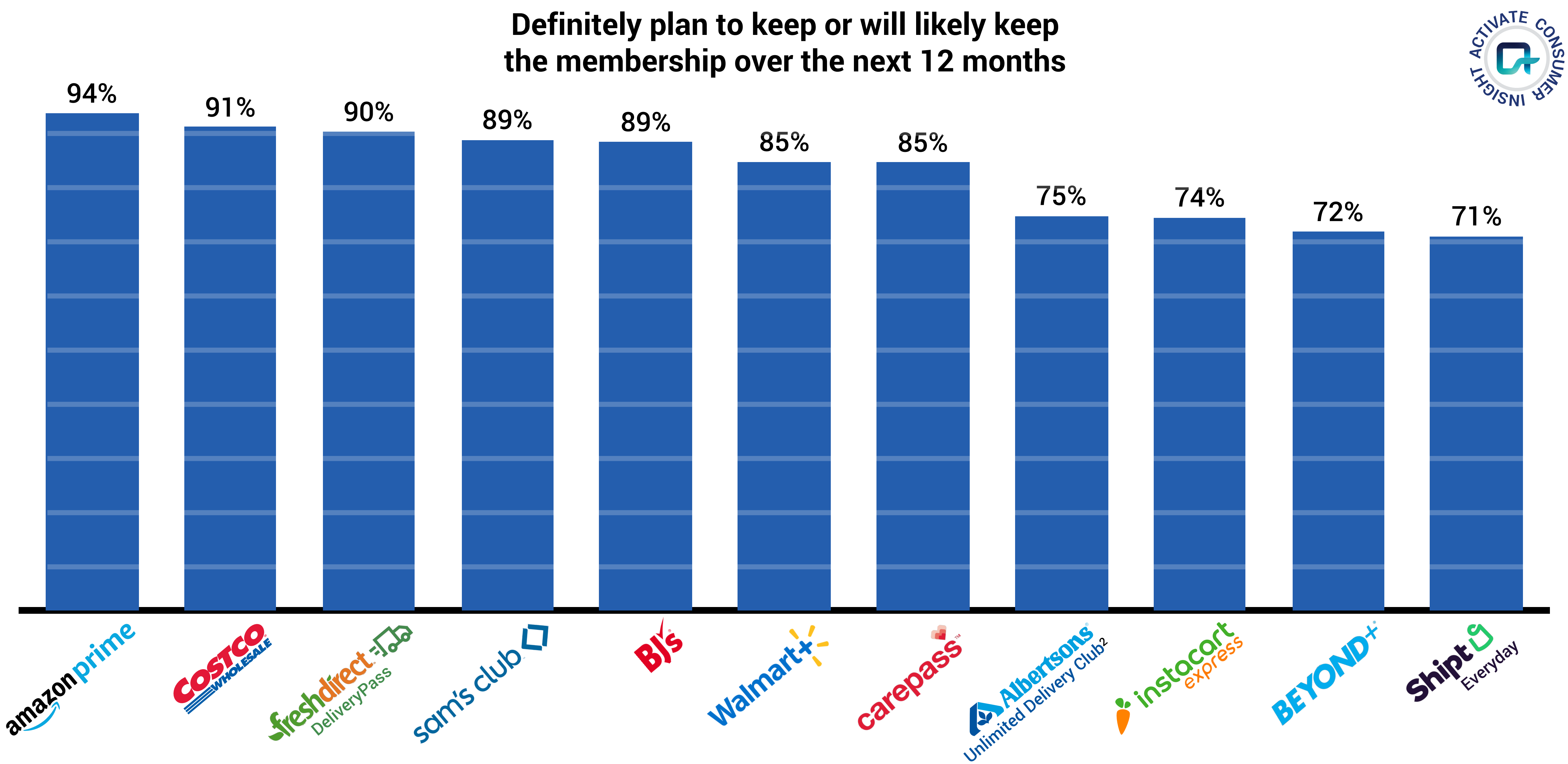
ACTIVATE CONSUMER INSIGHT

80%	**Share of households that pay for at least one shopping program membership[1]**
1.7	**Number of shopping program memberships[1] for which the average household pays**
64%	**Share of households that pay for an Amazon Prime membership**
50%	**Share of households that pay for at least one warehouse club[2] membership**
Top 4	**Launched 6 months into the COVID-19 outbreak (Sept. 2020), Walmart+ has rapidly become the fourth most popular program**

1. "Paid shopping program memberships" do not include free loyalty program memberships. 2. "Warehouse clubs" include Costco, Sam's Club, and BJ's.
Sources: Activate analysis, Activate COVID-19 Consumer Tech & Media Study May 2021 (n = 2,913)

The overwhelming majority of households plan to keep paying for their shopping program memberships over the next year; many of the programs will retain 85% or more of their memberships

INTENT TO KEEP THE PAID SHOPPING PROGRAM MEMBERSHIP[1] OVER THE NEXT 12 MONTHS BY SELECT MAJOR PROGRAMS,
U.S., 2021, % HOUSEHOLDS THAT PAY FOR A MEMBERSHIP TO THE SHOPPING PROGRAM



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Within the new privacy-focused web, shoppers are willing to give online retailers access to their data in exchange for a personalized experience

AVERAGE NUMBER OF PERSONAL DATA TYPES THAT ONLINE SHOPPERS[1] AGED 18+ ARE COMFORTABLE SHARING TO CREATE A USER ACCOUNT/PROFILE WITH THE WEBSITES/APPS USED TO SHOP ONLINE IN EXCHANGE FOR PERSONALIZED BENEFITS, U.S., 2021

When told that by sharing personal data to create a user account/profile with an online retailer, they may receive personalized benefits such as the abilities below…

ACTIVATE CONSUMER INSIGHT

- Speed up checkout
- Create wish lists
- Receive better item recommendations
- View order history and tracking status
- Post reviews/ratings
- Receive loyalty rewards/discounts

…the average online shopper[1] is comfortable sharing 6.3 types of personal data with the online retailers that they shop with

TYPES OF PERSONAL DATA

Full name	Age / date of birth	Ethnicity/race	Gender	Household income	Personal email address
Personal phone number	Home address	Location while using the website/app	Browsing/search history on the website/app	Physical characteristics (e.g. height, skin tone, hair type)	Health information (e.g. allergies, conditions, exercise)

1. "Online shoppers" defined as consumers who shop online at least once per year.
Sources: Activate analysis, Activate COVID-19 Consumer Tech & Media Study May 2021 (n = 2,913)

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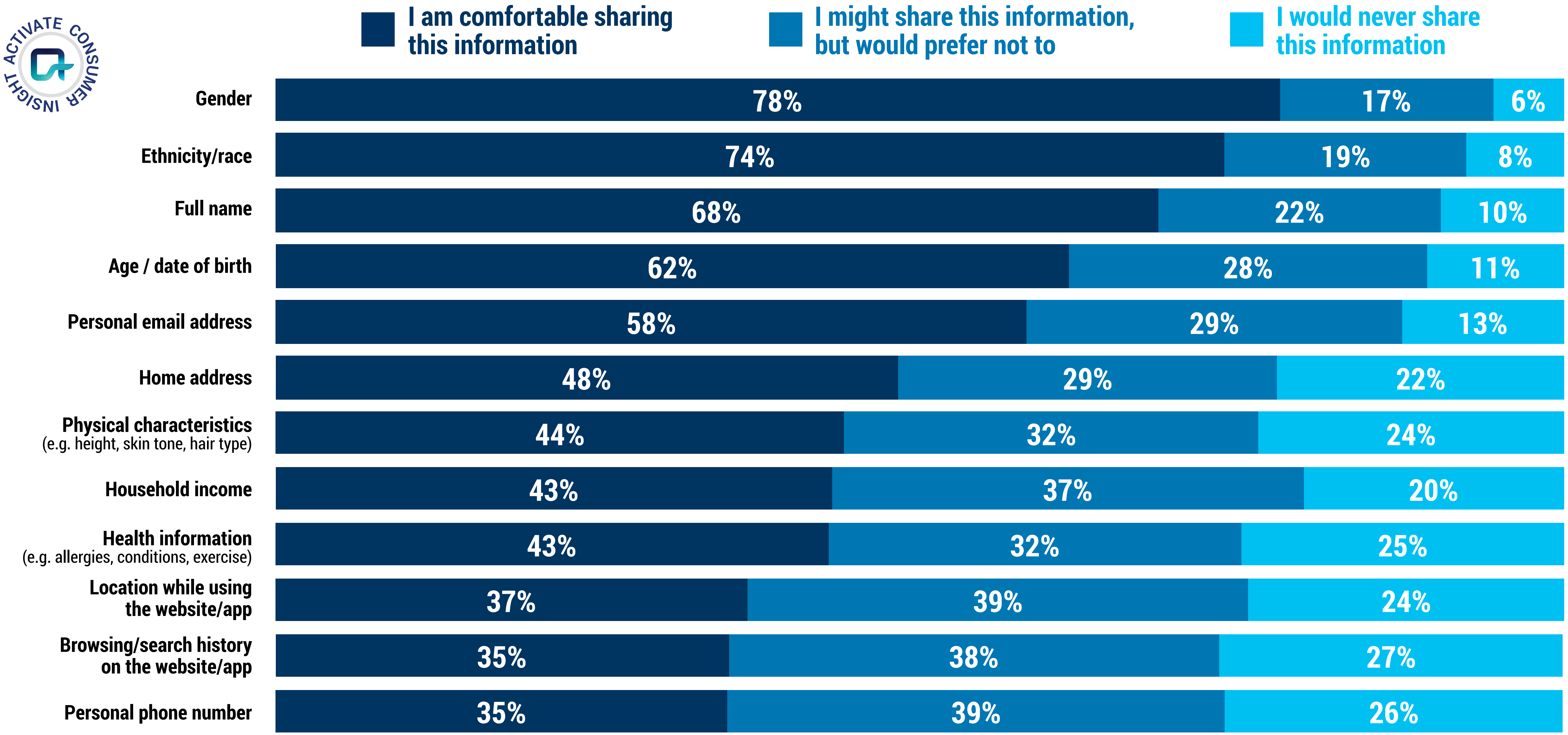
Consumers are most comfortable sharing their personal demographic information with online retailers

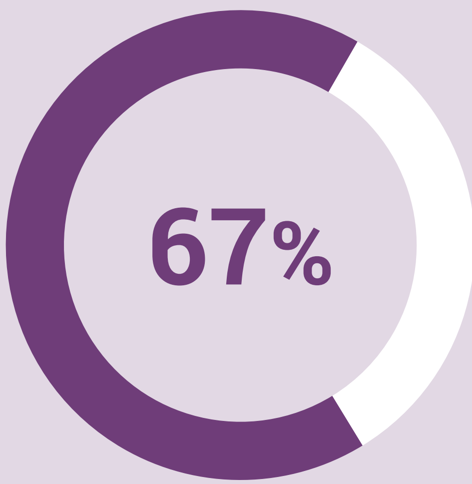
WILLINGNESS TO SHARE PERSONAL DATA TO CREATE A USER ACCOUNT/PROFILE WITH THE WEBSITES/APPS USED TO SHOP ONLINE IN EXCHANGE FOR PERSONALIZED BENEFITS[1], U.S., 2021, % ONLINE SHOPPERS[2] AGED 18+



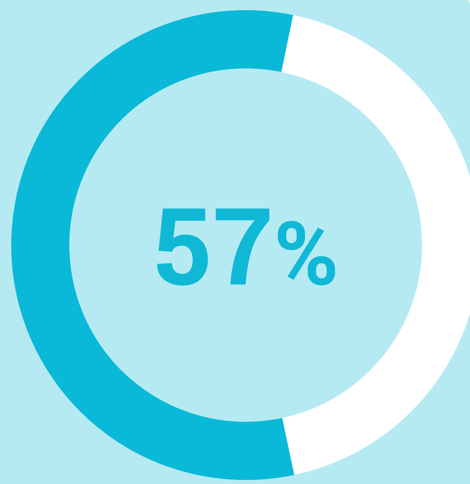
Note: Figures do not sum due to rounding. 1. "Personalized benefits" may include the ability to: speed up checkout, receive better item recommendations, create wish lists, view order history and tracking status, post reviews/ratings, and receive loyalty rewards/discounts. 2. "Online shoppers" defined as consumers who shop online at least once per year.
Sources: Activate analysis, Activate COVID-19 Consumer Tech & Media Study May 2021 (n = 2,913)

Online shoppers are trading their personal privacy for monetary benefits

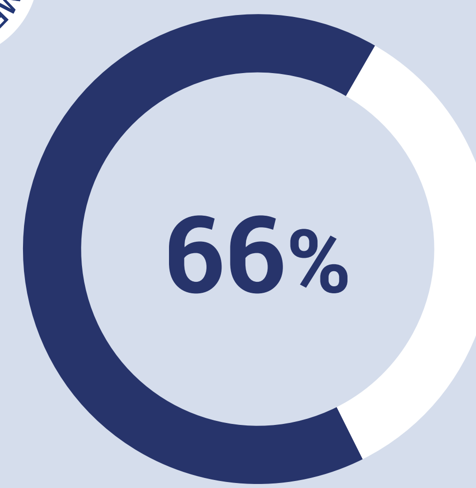
SHARING OF PERSONAL DATA WITH ONLINE RETAILERS IN EXCHANGE FOR MONETARY BENEFITS,
U.S., 2021, % ONLINE SHOPPERS[1] AGED 18+



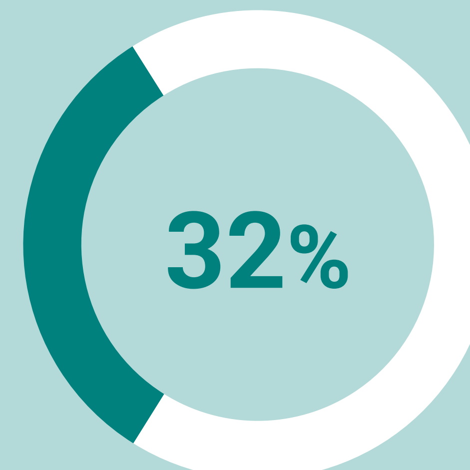
Signed up online for a retailer's email list to receive a welcome reward
(e.g. discount on first purchase, free shipping on first order)



Shared their date of birth with a retailer online to receive a birthday reward
(e.g. free item, discount, store credit)



Signed up online for a retailer's loyalty program to receive rewards
(e.g. points on every purchase that can be redeemed for store credit)



Signed up online for a retailer's credit card to receive rewards
(e.g. cash back on card purchases, discount on first purchase with card)

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1. "Online shoppers" defined as consumers who shop online at least once per year.
Sources: Activate analysis, Activate COVID-19 Consumer Tech & Media Study May 2021 (n = 2,913)

Consumers are more willing to share personal data in exchange for better item recommendations when shopping within product categories that feature more complex and customizable items

SHARING OF PERSONAL DATA WITH ONLINE RETAILERS IN EXCHANGE FOR BETTER/MORE PERSONALIZED ITEM RECOMMENDATIONS BY PRODUCT CATEGORY, U.S., 2021, % ONLINE SHOPPERS IN THE PRODUCT CATEGORY[1] AGED 18+

Added at least one type of personal data to a user account/profile with an online retailer in order to receive better/more personalized item recommendations

ACTIVATE CONSUMER INSIGHT

GROCERY

36%

TYPES OF PERSONAL DATA

- **Allergies**
- **Health restrictions** (e.g. diabetes, heart condition)
- **Religious restrictions** (e.g. kosher, halal)
- **Dietary preferences** (e.g. vegan, organic)
- **Diet plans** (e.g. keto, Atkins)
- **Health/fitness goals** (e.g. lower cholesterol, lose weight)
- **Exercise activities** (e.g. running, yoga)

BEAUTY/GROOMING[2]

52%

TYPES OF PERSONAL DATA

- **Skin tone**
- **Skin type**
- **Hair color**
- **Hair type**
- **Facial hair**
- **Eye color**
- **Age range**
- **Allergies**
- **Beauty/grooming concerns (e.g. wrinkles, acne)**
- **Ingredient preferences (e.g. natural, cruelty-free)**

CLOTHING

47%

TYPES OF PERSONAL DATA

- **Height**
- **Weight**
- **Body shape/build (e.g. athletic, hourglass)**
- **Bra size**
- **Disabilities (e.g. wheelchair or prosthetic use)**
- **Exercise activities (e.g. running, yoga)**
- **Clothing preferences (e.g. vegan, ethically-made)**

For more complex product categories, consumers have a greater need for retailer suggestions to help them find items addressing their specific demands; this is reflected in a higher willingness to share private data to improve the quality and quantity of retailer suggestions

1. "Online shoppers in the product category" defined as consumers who purchase items in the product category at least once per year and who have shopped online for items in the product category since the start of the COVID-19 outbreak (i.e. since March 2020). 2. "Beauty/grooming" does not include personal care (e.g. deodorant, toothpaste, contact solution, q-tips, hand sanitizer).
Sources: Activate analysis, Activate COVID-19 Consumer Tech & Media Study May 2021 (n = 2,913)

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THE POST-COVID ONLINE SHOPPER

GROWTH OUTLOOK FOR ONLINE SHOPPING

ECOMMERCE DISCOVERY

DELIVERY VS. PICKUP

PURCHASING WITH NEW ONLINE RETAILERS

SHOPPING PROGRAM MEMBERSHIPS

CONSUMER DATA SHARING ON THE PRIVACY-FOCUSED WEB

ABOUT ACTIVATE

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Activate Consulting's Capabilities: Focused on Driving Growth

IMPLEMENTATION AND PROGRAM MANAGEMENT TO
EXECUTE STRATEGY AND DELIVER PERFORMANCE IMPROVEMENT INITIATIVES

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Phoebe Gould
George Levy
Joe Sileo
Jonathan Homidan
Brigid Lynch
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Sonali Dane
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Activate Viewpoint: Post-COVID Online Shopper