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Female Consumers in the time of COVID

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suzy.com

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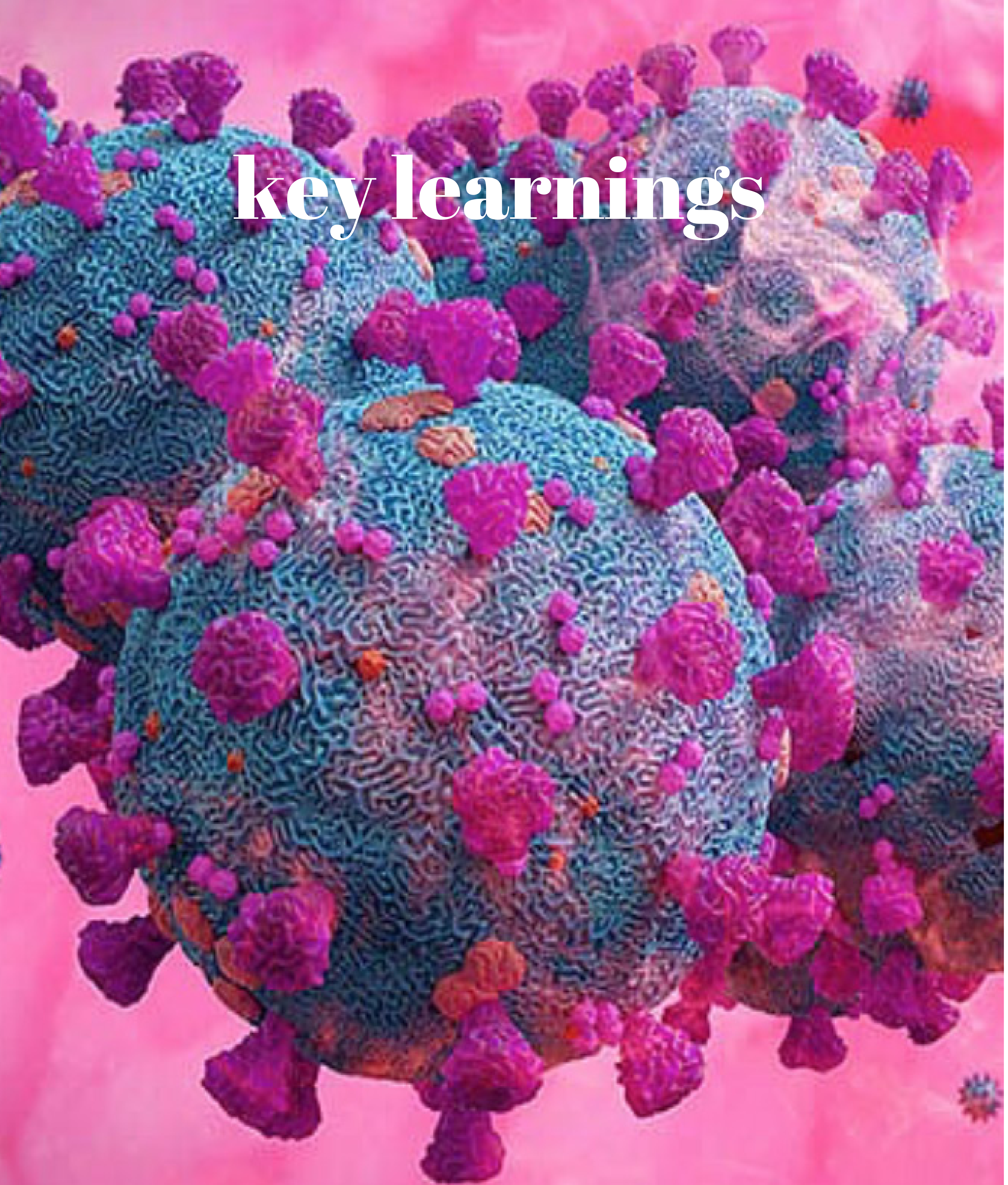
Making intelligent decisions during these times of market instability is challenging which makes it even more important to check in and listen to our consumers…*in real time*. In a collaboration with Suzy.com, a real-time digital research company –

we checked in with female consumers to stay current on what she is thinking, feeling and looking for - right now.

The survey included 1,000 female consumers aged 18 – 65 geographically spread across the US.



key learnings

- **Women remain the primary purchase decision-makers in the household** (before and during Covid).
- **Consumers are prioritizing value and safety over brand loyalty.**
- **Social responsibility and clearly articulated brand values are impacting brand interactions and driving purchase interest.**
- **Consumers are trying more products that make them feel healthier, better and more confident.**

implications

1. **Review brand portfolio mix –** to consider developing a value entry.

2. **Develop line extensions** specifically focused on **health, wellness and safety/sanitary.**

3. **To be culturally relevant, include social responsibility and sustainability practices** – incorporated into packaging and other communications.

4. Above all else – **review and potentially evolve value proposition** – even for category leaders.

Q1: Thinking of household shopping habits **PRIOR** to COVID-19, please select the statement that best describes you:

Total Participants: 1060

Words	Amount	Percentage
I was primarily responsible for purchase decisions in my household	661	62%
My spouse/partner and I shared responsibilities when making purchase decisions	262	25%
Another adult (other than myself/partner) was primarily responsible for purchase decisions	57	5%
My spouse/partner was primarily responsible for purchase decisions in my household	47	4%
My child(ren) were primarily responsible for purchase decisions in my household	33	3%

Purpose of this line of questioning is to validate female shoppers are still driving the purchase decisions in households.

Q2: Thinking of household shopping habits **SINCE** COVID-19, please select the statement that best describes you:

Total Participants: 1052

Amount	Percentage
671	64%
265	25%
53	5%
45	4%
18	2%

Female consumers are still the worlds most powerful consumers…driving the majority of household purchases/purchase decisions – which has increased 2% since COVID began.

Q3: Thinking about your purchasing behaviors PRE- COVID-19 to NOW, please select the statement that best describes you:

Total Participants: 1033

Words	Amount	Percentage
I am purchasing the same brands now as I did pre COVID	**640**	**62%**
I am purchasing different brands now than I did pre COVID	**327**	**32%**
I don't know/not sure	**66**	**6%**

Brand loyalty remains strong although there is a shift to being open to purchasing different brands. Probably indicative of trend showing up in other data that indicates house brands are growing.

Q4: Have you purchased any new products since the onset of COVID-19? If so, what categories do they fall under? Select all categories that apply:

Total Participants: 1016

Words	Amount	Percentage
Health care	424	42%
Self-Care	413	41%
Beauty care	363	36%
Wellness	355	35%
I have not purchased any new products since the onset of COVID-19	346	34%

The categories that are growing make perfect sense in light of COVID – from a brand growth perspective it may be worthwhile considering how to use existing product formulations and positioning towards these attributes.

Q5: Since COVID-19 began, are you purchasing products that make you feel (select all that apply) :

Total Participants: 1000

Words	Amount	Percentage
Healthy	610	61%
More Confident	475	48%
Better	471	47%
None of the above	180	18%

Interesting nomenclature and positioning to consider for new product development and line extensions. Feeling…healthy, more confident…better is resonating with female consumers.

Q6: BEFORE COVID-19, what visual cues and messaging on packaging influenced your purchases? Select your Top 2:

Total Participants: 1010

Words	Amount	Percentage
Value	522	52%
Brand	473	47%
Safety/sanitary	347	34%
Natural/organic formulas	293	29%
Cause/social responsibility/giving back	169	17%

No surprise value is at the top; with brand coming in right behind it.
There is a notable shift in hierarchy since COVID noted on the right.

Q7: SINCE COVID-19, what visual cues and messaging on packaging influenced your purchases? Select your Top 2:

Total Participants: 1005

Amount	Percentage
509	51%
460	46%
409	41%
256	25%
198	20%

Value still ranks first – with safety sanitary rising up into the consideration set.

Q8: When shopping online, what do you notice first:

Total Participants: 1003

Words	Amount	Percentage
Price	488	49%
Brand	276	28%
Ingredients	135	13%
Color	80	8%
Shape	24	2%

From a design perspective, the value/price proposition is the key driver (no surprise) – with brand a close second. Surprising that color/shape are not more influential in the digital marketplace.

Thank You

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