Contents

3 Introduction
4 U.S. Households in Economic Retreat
5 The New Customer Experience
7 Changing Purchase Decision Drivers
9 Effects of Taking a Stand on Racial Justice
11 Conclusions
12 Research Methodology
13 Appendix Research Data Tables
U.S. consumers are on edge. Faced with unemployment higher than at the peak of the Great Recession, a record-breaking decline in GDP, a toxic political atmosphere, and a global pandemic, it is no wonder that consumer behavior has changed. Yet, they remain hopeful.

Customers are still buying, and consumers are still consuming. They are just doing so differently. To better understand how purchase decision making has changed because of the pandemic, we asked U.S. consumers about their purchase decision drivers, household economics, consumption behaviors, and views on brands taking a stand on racial justice. Individual decision driver questions were focused on the consumer packaged goods (CPG) industry as those brands should be more top of mind due to a high purchase frequency, recent product shortages, and calls for boycotts. Please note, we delineated between customers (people who buy) and consumers (the overall market) to better convey how individual insights apply.

Despite this CPG focus, we believe how and why decision making has changed may very well be applicable to general retail, apparel, dining, and other industries. The new engagement behaviors and household fiscal reactions to Covid-19, and the ensuing recession, provide valuable insights far beyond the consumer space.

This new research demonstrates:
- How large a role the risks associated with Covid-19 plays in purchase decision making
- The rising importance of the convenience decision driver
- The scale of forced and budget-driven brand switching
- Changes to household spending behavior
- Rapid shifts in engagement behaviors
- The impact of brands taking a stance on racial justice

We hope you find this research informative and invite you to contact us regarding any research you may be interested in conducting.

Thank you,

Marc Shull  
Founder & Chief Consultant | Marketing IQ

Introduction
Household fiscal reactions to the recession brought on by the pandemic and the associated increase in unemployment cannot be understated. Belt tightening behaviors have been prevalent across all economic subsegments of the U.S. consumer base, some out of fear and some out of necessity. 59% of respondents reported being more cautious with their finances by adopting household budgets, delaying major purchases, or buying alternative products at lower price points. Overall, 19% said they started using a household budget, with those most likely to adopt a budget being those with an annual household income of less than $25,000 (34%) and those experiencing a decline in spending (25%). However, this behavior was not limited to lower income households, as 38% of those who started using a budget had a household income greater than $50,000.

To cope with a reduced income, or self-imposed budget, customers started looking for lower priced alternatives to the brands they usually purchase. Two in five survey respondents (41%) reported buying different brands to try to save money. This behavior was noticeably higher among households which reduced their spending, those with incomes under $50,000, those under the age of 30, and women. With most consumer packaged goods marketing geared toward women, it should be noted that they reported being 32% more likely to buy different brands to save money and 11% more likely to delay a major purchase than men. To a lesser degree, this switching behavior also appeared in affluent households and those not experiencing financial hardship with no fewer than 22% shopping for lower price brands in all audience segments analyzed.

Delaying major purchases was the most common fiscal tactic identified by our research. Nearly half of the respondents surveyed (48%) reported having delayed buying appliances, vehicles, and other higher priced items. This behavior was reported across all demographic, political, and economic spectrums including:

- 40% of households earning more than $100,000 a year
- 44% of those with stable household spending behaviors
- 71% of those who reported a decline of 20% or more in their household spending

Overall, this research indicates that the abrupt shift in many household financial situations, and the general uncertainty about the economy, has had a direct impact on the purchase decision making process, even among those whose financial situation has not changed. Brands should be cognizant of this when considering price changes, value positioning, direct to consumer offerings, and retention and acquisition strategies.
The health, economic, and social changes brought on by the pandemic have fundamentally altered how, why, and where customers interact with brands. For many industries, the pandemic has helped move customers online more effectively than individual brand marketing efforts were able to do, while simultaneously smashing the traditional brand loyalty dynamics and CPG competitive landscape. With 83% of respondents reporting they changed one or more surveyed behaviors, this research identified four primary reasons why customer experience has changed:

- Reduced access to physical retail locations
- Product shortages
- Financial pressures driven by recession & unemployment
- Concern for contracting Covid-19

Even at grocery, pharmacy, and club stores which remained open, increased restrictions such as occupancy limits, mask wearing, time in-store, distancing, reduced acceptance of cash, and changing rules reduced the ease of access and created a frustrating customer experience. With online shopping infrastructures already in place for most CPG retailers, the shift to online buying was a viable alternative for many customers, even if it was the first time they had engaged or purchased through that channel with a given retailer.

Online grocery shopping, which has traditionally struggled in the United States, saw a massive increase in online sales with 43% of respondents trying online grocery ordering for delivery or pick up for the first time. Demand in the grocery shopping channel grew across all gender, income, and age groups. 55% of those rating Risks Associated with Covid-19 as the top decision driver tried online grocery shopping. Even among those that rated Risks Associated with Covid-19 as the least important decision driver, 25% reported they tried it.

The pandemic and ensuing effects has made CPG customer loyalty more challenging than ever. With initial panic buying leading to shortages in some CPG categories, 74% of respondents reported they had to buy different brands because those they normally purchased were unavailable, an unprecedented level of forced brand switching. Compounded with efforts to reduce household spending, 81% reported switching brands from those they regularly bought.
The New Customer Experience

With an increasingly frustrating customer experience at “essential” retailers and the closure of many non-essential retailers, many customers were driven to find their brands elsewhere and to try new retailers, brands, and channels. Beyond CPG-specific retail, 26% of respondents reported using new shopping apps to help them meet their needs. The use of new shopping apps was highest among lower income households (36%), respondents under the 45 years of age (35%), and those looking for brands that are environmentally responsible (32%) or support racial justice efforts (35%). Even among respondents over the age of 60, a traditionally less digitally engaged audience, 22% started using new shopping apps.

Marketers should also take note that consumers have changed where they engage with advertising. With more time spent at home, it is not surprising that 23% of our respondents added a new streaming service since the outbreak. Demographically, this was most common with males (28%) and those age 30-44 (34%), although double-digit increases were observed across all analyzed audiences.

The purchase decision drivers and behavioral influences identified in this research do not support the customer experience ever fully returning to its previous state. Important considerations in determining the timing and degree to which the customer experience will revert to a pre-pandemic form are:

- How well brands and retailers adapt their business models to provide a quality and valuable online customer experience relative to their pre-pandemic in-store experience
- How long the recession and associated changes in spending behaviors lasts
- The creation and distribution of a vaccine for Covid-19

83% of respondents reported having changed shopping behaviors in response to Covid-19 and its economic effects.
Following months of economic and social uncertainty, mass migration to online buying, and dramatic changes to the day-to-day life of the average consumer, the factors influencing how customers make their purchase decisions have meaningfully, if subtly, changed. The introduction of the Risks Associated with Covid-19 driver shows it to be an important new factor for most customers, yet the traditional top decision drivers: Price / Value for the Money and Quality remained dominant. Beyond the introduction of this new driver, the changes identified with Convenience, Discount Offered, Environmental Impact, and a Brand’s Position on Racial Justice are highly reflective of the times and provide important insights into the rapidly evolving mind of the customer.

The ability for a new decision driver to rank as the 4th most important driver speaks to the impact the pandemic has had on purchase decision making and our lives in general. With 67% rating it a 5 or higher on a 7-point scale, easily displacing mainstays like Discount Offered, the Risks Associated with Covid-19 driver scored 40% higher, on average, than the driver which arguably has the next highest public profile and increased the most (8%) in our survey, a Brand’s Position on Racial Justice. While both are politically polarizing, the health risks associated with Covid-19 is impossible to ignore during any trip to the store.

In a country where customers are more likely to be burdened by too many choices, the inability to find basic household goods, like toilet paper, was a new and frustrating experience for the typical U.S. customer. Therefore, it was not surprising Convenience, the ease of finding what a customer is looking for, saw growth of 7% since the start of the pandemic which effectively moved it from a 2nd tier decision driver into contention with Quality and Price / Value for the Money. As 74% of survey respondents reported they bought alternative brands due to availability issues, it is also not surprising that all analyzed segments noted an increase in the importance of Convenience, while traditional drivers like Trusted Brand and Price / Value for the Money have become somewhat less important.

Environmental Impact saw the greatest decline in importance of any decision driver at -4%, with some segments seeing a decline of more than -12%. The two analyzed audiences with the largest decline in importance for Environmental Impact were those age 30-44 (-12%), and those who said they would continue to buy from a brand which took a racial justice or another political stance with which they disagreed (-12%).
With brands like Nike, Goya, and the NFL in the news regularly for positions they have taken, or not taken, on racial justice issues and the calls for boycotts, it might be natural to conclude this decision driver has taken on a more prominent role in the purchase decision making process. What the research uncovered was a little more complicated. Results showed that while the importance of this driver increased more than any other in the survey (+8%), it remained the least important decision driver overall and by a relatively wide margin. Furthermore, analysis of the Top and Bottom 2-Box (table below) showed this driver to be the most polarizing as can be seen in the table below.

Purchase decision drivers are in a state of unprecedented change. These changes may be exacerbated with a second wave of infections, or with a new shut down, and will likely see additional changes when an effective vaccine is eventually implemented. What is clear is how brands address the increased focus on convenience and minimize the risk of Covid-19 to their customers are now key aspects of the purchase decision making process.

### Changing Purchase Decision Driver Priorities: Pre & Post Pandemic Top & Bottom 2-Box

<table>
<thead>
<tr>
<th>Rank - Top &amp; Bottom 2-Box</th>
<th>Quality</th>
<th>Price / Value for Money</th>
<th>Convenience</th>
<th>Risks Associated with Covid-19</th>
<th>Discount Offered</th>
<th>Trusted Brand</th>
<th>Reviews and Recommendations</th>
<th>Brand Position on Racial Justice</th>
<th>Environmental Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top 2-Box Pre-Pandemic</td>
<td>79%</td>
<td>78%</td>
<td>48%</td>
<td>53%</td>
<td>41%</td>
<td>42%</td>
<td>21%</td>
<td>79%</td>
<td>38%</td>
</tr>
<tr>
<td>Bottom 2-Box Pre-Pandemic</td>
<td>71%</td>
<td>71%</td>
<td>60%</td>
<td>12%</td>
<td>46%</td>
<td>40%</td>
<td>26%</td>
<td>71%</td>
<td>34%</td>
</tr>
<tr>
<td>Top 2-Box Post-Pandemic</td>
<td>53%</td>
<td>53%</td>
<td>1%</td>
<td>7%</td>
<td>7%</td>
<td>7%</td>
<td>11%</td>
<td>53%</td>
<td>13%</td>
</tr>
<tr>
<td>Bottom 2-Box Post-Pandemic</td>
<td>48%</td>
<td>48%</td>
<td>60%</td>
<td>7%</td>
<td>45%</td>
<td>42%</td>
<td>26%</td>
<td>48%</td>
<td>18%</td>
</tr>
</tbody>
</table>

**Question:** Thinking about your consumer packaged goods purchases before [after] the Covid-19 pandemic started, how important were the following to your purchase decisions?

**Note:** The Top 2-Box groups the two highest ratings, in this case those that rated a decision driver a 6 or 7 on the 1-to-7 point scale. The Bottom 2-Box groups 1 and 2 ratings. This is done to reduce volatility and to demonstrate the volume of responses at the extreme ends of the scale.
Boycotts are nothing new. However, in today’s social climate, with an increasingly polarized electorate and an unprecedented level of support for the Black Lives Matter movement, more brands are being pulled into the fray as some consumers demand brands take a stand. As a purchase decision driver, a Brand’s Position on Racial Justice saw the greatest increase in importance of any driver, yet remained the least important overall. Genuine brand altruism in support of social and racial justice does not appear to represent a long-term threat to most brands. However, taking a stance does encourage trial of competitive brands as evidenced by 36% of respondents stating they reduced or stopped buying from a brand because of their position on an issue.

Nearly one in four respondents (24%) indicated a Brand’s Position on Racial Justice was more important to their purchase decision making now than it was prior to the pandemic. Overall, it has grown in importance, on average, by 8% outpacing all other surveyed drivers, most of which saw a decline from pre-pandemic to now. This increase was tempered by the 9% who stated this driver was now less important. Furthermore, as a driver it remains in last place trailing Environmental Impact, which experienced the largest importance decline of any purchase decision driver. Results also showed there are consumers who look unfavorably on brands taking any stances on social and political issues, as such, any position a brand takes on a politically charged topic will result in some portion of their customer base being upset.
Research results indicated when it comes to making purchase decisions for consumer packaged goods, the majority of consumers either do not prioritize racial justice, environmental impact, or other political stances brands take or they are willing to overlook disagreements for financial reasons, a lack of alternatives, or even a coupon. Even for consumers who boycott brands that take positions they disagree with, respondents signaled their adherence to boycotts is limited and fleeting in many cases.

To be sure, there are some ardent protesters, and with 44% stating they had taken some form of action in protest to a brand previously purchased, the short-term impact can be substantial. Overall, 22% named at least one brand they were boycotting. However, passive protest appears to be substantially more common than active protest, with only 6% reporting they had actively protested a brand compared to 36% who only said they reduced or stopped buying. Of those who stated they had taken some form of action in protest of a brand, 71% said they were boycotting a brand with half (52%) of mentions concentrated among just 6 brands: Goya, Nike, Home Depot, Chick-fil-A, NFL, and Target.

In most cases, boycotting of individual CPG brands appears to be short-lived. By far, Goya, which has recently been in the news, was the most mentioned boycotted CPG brand with 63% of CPG mentions, while perennially boycotted brands like Chick-fil-A (11%) and Hobby Lobby (4%) were mentioned far less. When asked to name any brands, CPG or otherwise, they were boycotting, respondents named non-CPG brands 77% of the time and the pattern of naming brands recently in the news was also observed. The brands most often tied to the Black Lives Matter movement, Nike (17%) and the NFL (7%), also found themselves among those brands most mentioned.

What is clear is economic woes eclipse ideology when it comes to putting food on the table. Respondents who decreased their household spending, or had an annual household income of less than $25,000, had an average or stronger prioritization of a Brand’s Position on Racial Justice but were noticeably more likely to continue to buy from, or return to, a brand they disagreed with. For example, low income households were 80% more likely than the overall respondent base to return to a brand if provided a discount.

Brands, which are better able to deliver across all purchase decision drivers, including those that can be overwhelmed by economic factors, will find a larger portion of the market open to switching to their brand than would have been the case before the pandemic. However, brands should be aware that taking a public stand on racial justice or other political issues may not have the intended effect, and initial reactions may quickly fade.
This research found a consumer base that is in a state of unprecedented change and they are on edge. As the pandemic and recession play out, purchase decision drivers and their underlying influences will continue to evolve. The findings highlight the importance of brands and retailers doing all they can to reduce the risk of spreading Covid-19 and aligning with customers’ increased need for convenience. Doing so will be key for brands and retailers to not just survive, but to thrive. The rapid evolution of purchase decision drivers will be magnified if there is a second wave of infections or if a new shut down is put in place. And again when an effective vaccine is eventually implemented. Therefore, it should come as no surprise that it is critical for brands to understand their own customer base and focus their efforts on meeting customer needs.

As we look at the insights developed from the research, here are the key take-aways:

- **The Customer Experience Has Transformed**: Changes to how, when, where, and why customers are engaging with a brand has accompanied the explosion in online demand. How much this reverts to pre-pandemic levels will vary by industry, but brands need to enhance their online experience if they want customers to return.

- **Loyalty Has Been Undermined**: The ability for customers to be brand loyal has been severely disrupted by economic and product availability factors. Brands need to rethink their channel, offer, retention, and acquisition strategies and tactics to align with changing consumer realities.

- **Consumer Spending Restrained**: A combination of reduced income, unemployment, and uncertainty has led to reduced spending in most households. Brands need to be conscious of this newfound consumer frugality after a decade of economic growth.

- **Customer Decision Making is Evolving**: The rapid changes we have seen this year to decision drivers are not done, and with the increased importance of secondary decision drivers, more disparate buyer groups are developing. Brands need to make it easier for customers to buy (convenience) and be more thoughtful when taking polarizing stances on hot button issues.

- **Knowledge is Power**: Assumptions are always dangerous when it comes to satisfying customer needs. With such radical changes to products and channel demand, decision drivers, engagement vehicles, the customer experience, and economic situations, a false assumption could drive your customers to a competitor. Brands should develop new analytics, insights, and research to remain relevant and informed.

We have been excited to work on this research as it enabled us to better understand what is truly going on in the mind of the consumer. Despite their clear concerns, they also communicated resiliency and the hope that things would improve. We hope the research data and our analysis provides you with insight into your customers’ behaviors and informs your marketing strategies to better meet their needs. Thank you.
Research Methodology

Methodology

Responses for this survey were collected on July 20, 2020 using SurveyMonkey Audience panel of U.S. adults, age 18+. We asked a group of 303 survey respondents several closed-ended questions about their purchase decision drivers before and after the Covid-19 pandemic, along with changes to their economic situation, and changes to their consumption behaviors due to Covid-19 and the ensuing recession. The results were adjusted by Gender and Age to ensure representativeness to U.S. Census. Information on how respondents are recruited to SurveyMonkey is available here: www.surveymonkey.com/mp/audience.

About the Researchers

Marc Shull is the founder of Marketing IQ. Best known for bringing a clear vision to client marketing challenges, Marc brings together the best of marketing’s left-brained analytics and insights with right-brained creative and strategy to develop highly effective marketing solutions.

Over the last 20+ years, Marc has worked with businesses ranging from regional non-profits to large multi-national corporations across a diverse set of industries including: Visa, Party City, Aetna, Del Frisco’s Restaurant Group, General Mills, Kraft, Miller Coors, P&G, eBay, Intel, Prudential Capital Group, Polska Grupa Farmaceutyczna, Domino’s, Safeway, and Wal-Mart.

As a market researcher, Marc’s expertise is looking beyond what was asked to develop dynamic insights that get at the heart of business issues and provides brands with clear and actionable answers to their management questions.

Marc holds an MBA degree from the University of Notre Dame and a BSBA degree in Marketing from Ohio State University

Dan Snelten is a seasoned market research professional with more than 25 years experience. A veteran of industry research leaders Ipsos and ORC International, he has also worked client-side, and most recently at Fluent, a leader in 2nd party data collection and performance marketing where he led all research initiatives. His work has informed C-suite decision making and guided insights development across a diverse range of clients and industries throughout his career including retail, financial services, medical devices, insurance, telecom, CPG, and dining.

Dan is well known for his keen attention to detail, focus on building strong client-partnerships, creative thinking, and innovative solutions. He has conducted and overseen extensive strategic research both domestically and globally, in support of segmentation, brand health, customer loyalty, product and concept testing, price sensitivity, attitude and usage, and tracking research. While his primary focus has been quantitative research, he has also conducted IDIs, focus groups and ideation sessions, and managed large-scale projects involving mall and store-intercepts.

Dan holds an MBA degree from Northern Illinois University and a BA degree in Sociology from Loyola University in Chicago.
### Table A: Key Audience Responses

<table>
<thead>
<tr>
<th>Gender</th>
<th>Annual Household Income</th>
<th>Age Group</th>
<th>Key Audiences</th>
</tr>
</thead>
</table>
|        | <$24,999              | <$25,000-
|$49,999
|$50,000-
$99,999 | $100,000+| 18-29 | 30-44 | 45-60 | Overall |
| Male   | 3.80                   | 4.13      | 3.04          | 4.45  | 3.85 | 3.96 | 4.37 | 2.97 | 4.45 | 3.58 | 3.51 | 2.95 |
| Female | 3.88                   | 4.13      | 3.04          | 4.45  | 3.85 | 3.96 | 4.37 | 2.97 | 4.45 | 3.58 | 3.51 | 2.95 |

### Decision Factors

| Purchase Decision Drivers: Pandemic Outbreak Importance | % Reduced / Stopped Spending with Brand | % Started Using a New Shopping App | % Started Using a New Streaming Service | % Started Using Grocery Delivery / Pick-up for First Time | % Started Using a New Shopping App
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A Brand's Position on Racial Justice</td>
<td>8.0%</td>
<td>12.2%</td>
<td>8.8%</td>
<td>9.7%</td>
</tr>
<tr>
<td>Environmental Impact</td>
<td>4.9%</td>
<td>4.4%</td>
<td>3.7%</td>
<td>4.1%</td>
</tr>
<tr>
<td>Convenience</td>
<td>6.7%</td>
<td>5.6%</td>
<td>5.0%</td>
<td>5.2%</td>
</tr>
<tr>
<td>Quality</td>
<td>5.6%</td>
<td>5.9%</td>
<td>5.9%</td>
<td>5.7%</td>
</tr>
<tr>
<td>Price / Value for Money</td>
<td>5.9%</td>
<td>6.0%</td>
<td>5.9%</td>
<td>5.9%</td>
</tr>
<tr>
<td>Discount Offer</td>
<td>5.4%</td>
<td>5.8%</td>
<td>5.8%</td>
<td>5.8%</td>
</tr>
<tr>
<td>Risk Assoicated with COVID-19</td>
<td>3.0%</td>
<td>4.8%</td>
<td>4.7%</td>
<td>4.2%</td>
</tr>
</tbody>
</table>

### Audience Segments

<table>
<thead>
<tr>
<th>Audience Segment</th>
<th>Key Audiences</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

###购买决策驱动：疫情爆发重要性

- 品牌在种族正义的地位：8.0%
- 环境影响：4.9%
- 方便性：6.7%
- 质量：5.6%
- 价格/价值：5.9%
- 折扣提供：5.4%
- COVID-19相关的风险：3.0%

###反馈和建议

- 社交媒体反馈：-2.4% (-3.7%)
- 产品改进：-1.8% (-3.7%)
- 客户反馈：-1.4% (-2.8%)
- 产品改进：-1.4% (-2.8%)

###影响和成果

- 市场份额减少 / 停止使用品牌的占比：10.8%
- 新购物应用程序启动：34.3%
- 新流媒体服务启动：28.4%
- 新外卖服务启动：23.4%
- 新购物应用程序 / 外卖服务启动：22.6%

###购物决策

- 618% 增加了购物
- 50% 增加了品牌
- 26.4% 增加了购物
- 14.7% 增加了购物
- 3.95% 增加了购物
- 0.06% 增加了购物
**Table B: Purchase Decision Drivers Correlation Matrix**

### Pre & Post Pandemic Outbreak Purchase Decision Driver Correlations

**Pre-Pandemic Drivers**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1. Brand’s Position on Racial Justice</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q1. Environmental Impact</td>
<td>0.499</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q1. Convenience</td>
<td>0.080</td>
<td>0.068</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q1. Quality</td>
<td>0.145</td>
<td>0.221</td>
<td>0.203</td>
<td>0.203</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q1. Trusted Brand</td>
<td>0.172</td>
<td>0.230</td>
<td>0.234</td>
<td>0.320</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q1. Price / Value for Money</td>
<td>-0.091</td>
<td>0.070</td>
<td>0.288</td>
<td>0.236</td>
<td>0.088</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q1. Discount Offered</td>
<td>0.081</td>
<td>0.093</td>
<td>0.166</td>
<td>0.099</td>
<td>0.167</td>
<td>0.342</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q1. Reviews and Recommendations</td>
<td>0.203</td>
<td>0.264</td>
<td>0.116</td>
<td>0.223</td>
<td>0.235</td>
<td>0.144</td>
<td>0.158</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q3. Brand’s Position on Racial Justice</td>
<td>0.875</td>
<td>0.421</td>
<td>0.052</td>
<td>0.085</td>
<td>0.165</td>
<td>-0.041</td>
<td>0.048</td>
<td>0.208</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q3. Environmental Impact</td>
<td>0.479</td>
<td>0.685</td>
<td>0.108</td>
<td>0.184</td>
<td>0.184</td>
<td>0.011</td>
<td>0.070</td>
<td>0.196</td>
<td>0.494</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q3. Convenience</td>
<td>0.098</td>
<td>0.033</td>
<td>0.516</td>
<td>0.177</td>
<td>0.257</td>
<td>0.214</td>
<td>0.126</td>
<td>0.121</td>
<td>0.158</td>
<td>0.047</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q3. Quality</td>
<td>0.017</td>
<td>0.088</td>
<td>0.243</td>
<td>0.413</td>
<td>0.313</td>
<td>0.270</td>
<td>0.158</td>
<td>0.243</td>
<td>0.017</td>
<td>0.141</td>
<td>0.239</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q3. Trusted Brand</td>
<td>0.165</td>
<td>0.136</td>
<td>0.185</td>
<td>0.281</td>
<td>0.545</td>
<td>0.057</td>
<td>0.069</td>
<td>0.243</td>
<td>0.171</td>
<td>0.236</td>
<td>0.268</td>
<td>0.414</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q3. Price / Value for Money</td>
<td>0.064</td>
<td>0.022</td>
<td>0.227</td>
<td>0.226</td>
<td>0.155</td>
<td>0.475</td>
<td>0.388</td>
<td>0.176</td>
<td>0.137</td>
<td>0.202</td>
<td>0.348</td>
<td>0.374</td>
<td>0.154</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q3. Discount Offered</td>
<td>0.060</td>
<td>0.023</td>
<td>0.184</td>
<td>0.112</td>
<td>0.133</td>
<td>0.348</td>
<td>0.653</td>
<td>0.108</td>
<td>0.107</td>
<td>0.088</td>
<td>0.222</td>
<td>0.123</td>
<td>0.072</td>
<td>0.503</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q3. Reviews and Recommendations</td>
<td>0.169</td>
<td>0.198</td>
<td>0.110</td>
<td>0.192</td>
<td>0.239</td>
<td>0.173</td>
<td>0.132</td>
<td>0.652</td>
<td>0.222</td>
<td>0.285</td>
<td>0.237</td>
<td>0.221</td>
<td>0.332</td>
<td>0.193</td>
<td>0.159</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Q3. Risks Associated with Covid-19</td>
<td>0.418</td>
<td>0.355</td>
<td>0.213</td>
<td>0.170</td>
<td>0.331</td>
<td>0.045</td>
<td>0.146</td>
<td>0.216</td>
<td>0.438</td>
<td>0.357</td>
<td>0.240</td>
<td>0.167</td>
<td>0.293</td>
<td>0.144</td>
<td>0.118</td>
<td>0.187</td>
<td>1</td>
</tr>
</tbody>
</table>
Marketing IQ was founded in 2009 to help businesses become data-driven by improving their understanding of the customer and leveraging their data assets, including market and customer research, all the way from compliance to outbound communication programs. Not with theoretical or academic solutions, but practical and tactical outcomes.

We have helped a wide array of businesses from multi-national technology and data management firms to growing restaurant groups and multi-channel retailers by developing and implementing innovative and highly actionable solutions that power insights-driven communication programs. All based on a robust understanding of their customer and prospect audiences that is designed to drive and effectively measure engagement, conversion, and ROI.

For more information about our research and other services click here MKT-IQ.COM
Or email us at mshull@mkt-iq.com