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The InMarket logo consists of the word 'IN' in white, followed by a green vertical bar with a white diagonal line, and the word 'MARKET' in white.

COVID-19: Marketing in Uncertain Times
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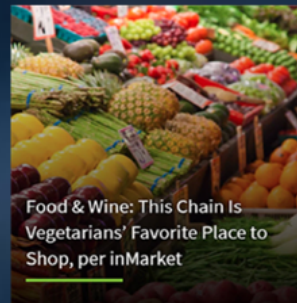
10 Years of Recognition as the Location Experts



WINNER – 2019 DIGIDAY AWARD
BEST MOBILE MARKETING
PLATFORM



WINNER – 2016 IAB MIXX
GEO-TARGETTING



Experience delivering ROI to the world's top brands



Hyper-accurate, first-party, SDK derived location data



*50,000,000+ active monthly users
*reportable in Comscore
Media Metrix® Multi-Platform

COVID-19 Challenges & Approach

- Global Health Crisis
- Statewide/County-wide limitations on consumer and business movement
- Panic buying strain on supply chain
- Economic downturn, record unemployment



Unprecedented Uncertainty

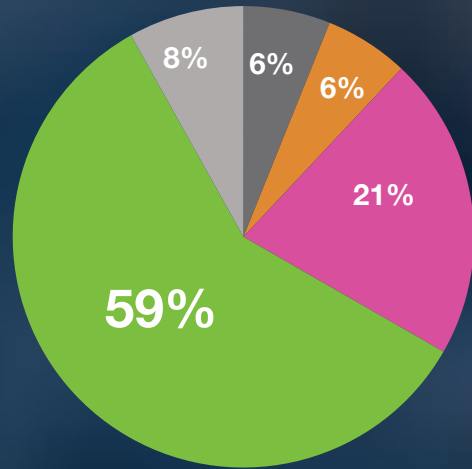
- Understand Consumer Sentiment
- Analyze Visit Trends to plan for current and future state
- Monitor Consumer Purchase Data
- Review-Plan-Act. Rinse, Repeat and Adjust to ever changing environment



Use Real Time Data to Meet Evolving Customer Needs

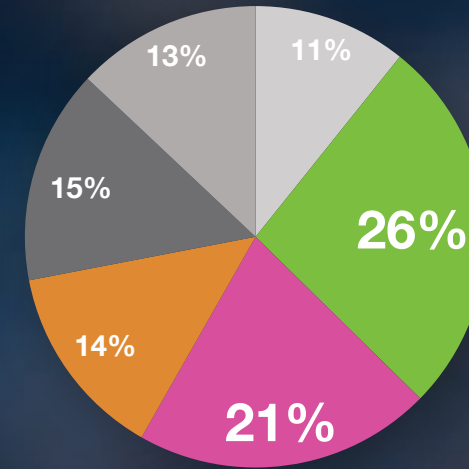
COVID-19 Consumer Sentiment

C19 Expected Economic Impact



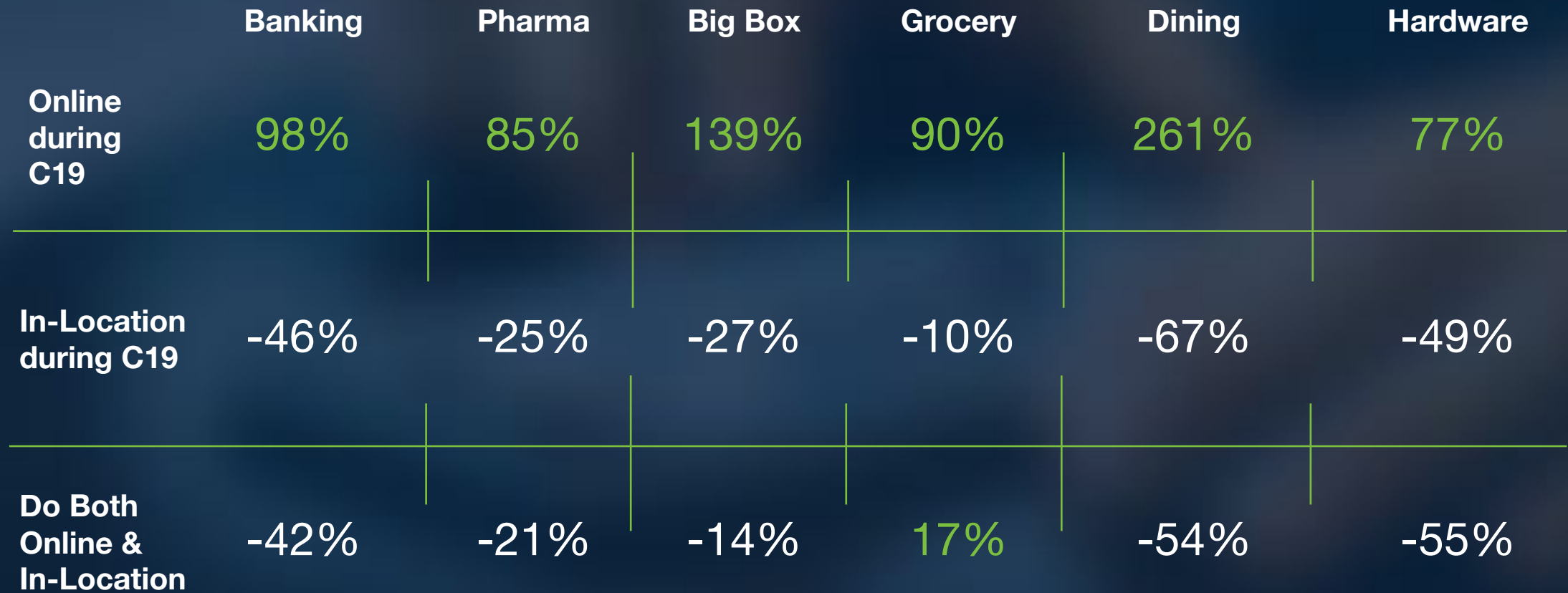
- No Impact
- Moderate Impact
- I don't feel like I can predict
- Slight Impact
- Severe Impact

Expected Length of Pandemic

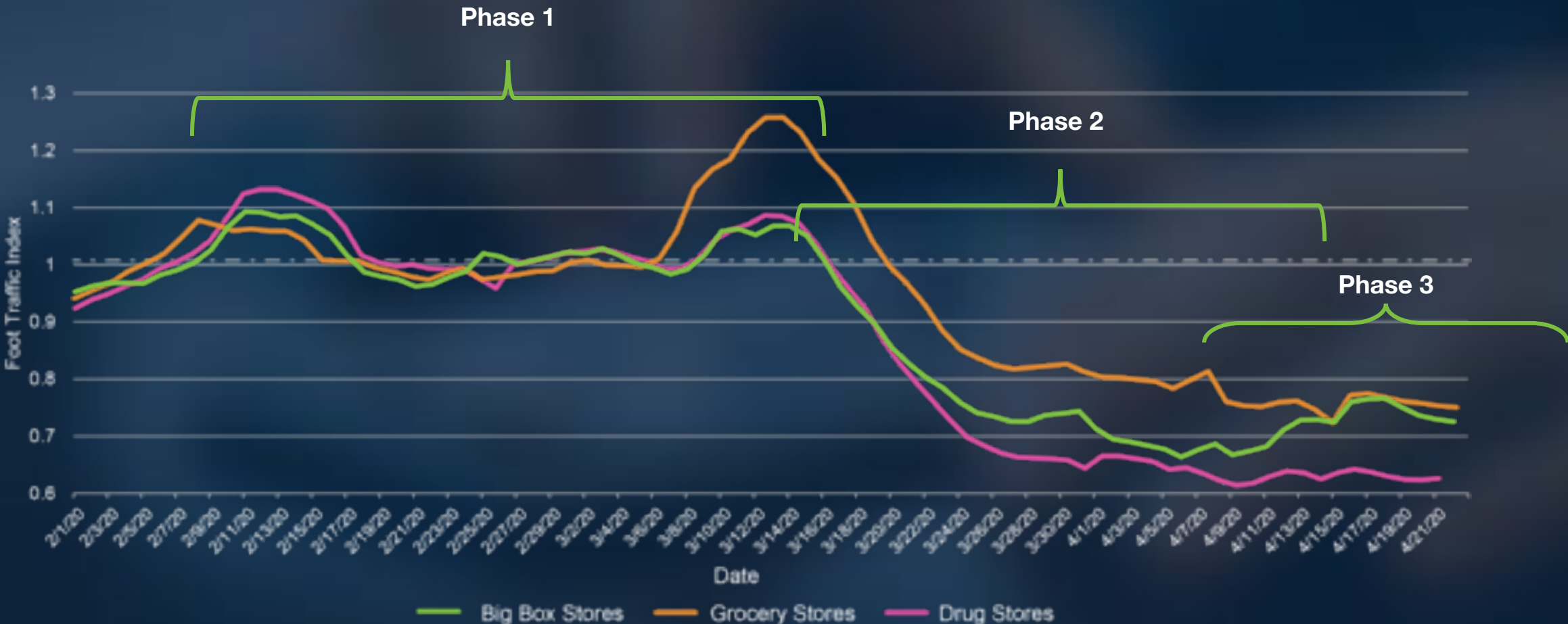


- 0-3 months
- 3-6 months
- 6-9 months
- 9-12 months
- 12 or more months
- I don't feel like I can predict

COVID-19 Changing Consumer Activity During C19 vs Before



C19 Macro Visit Trends



Retail Winners

Walmart 

20%

Sales jump in Past month*

- Online Grocery Pickup (OGP)
- Maintained messaging and Share of Voice
- Dedicated early hours for high-risk customers

Kroger 

30%

Sales Jump in March 2020

- Order for Delivery
- Testing Order for Pick up Store only
- Improved Employee Safety
- Improved customer flow for 6ft Social Distancing



POLL QUESTION:

As Shelter-In-Place measures are lifted, which locations do you think will see the biggest jump in visits?

- A) Hair Salons and Nail Salons**
- B) Beaches and Parks**
- C) Movie Theaters/Concert Venues**
- D) Restaurants/Bars**

C19 Visit Trends as Measures Ease

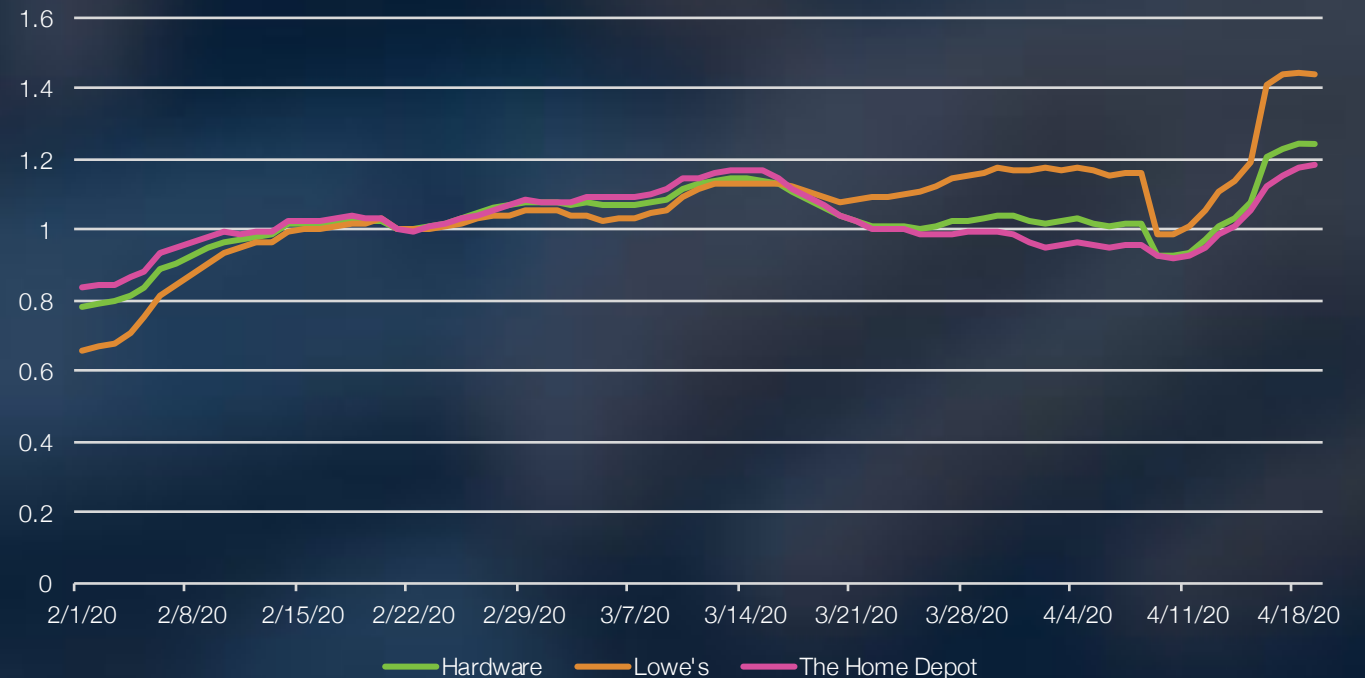
What can we expect?

- Stay-at-home orders begin to lift in TX & GA and more cities/states announce openings

Where will consumers go first?

- Nail Salons
- Gyms
- Parks & Beaches
- Home Improvement stores

Home Improvement Stores see visitation increase over pre-COVID-19 levels



C19 Purchase Trends – Early Phase

Purchase trends week over week highlight the COVID-19 announcements' impact on consumer purchase behaviors

- **Alcohol** remains in the top 3 products increases - with a 50% the first week alone
- **Canned & Frozen foods** maintained double digit increases
- **Nonperishables** – such as dried beans & canned milk remained strong
- **Household, office & cleaning** supplies grew
- **Tobacco** a panic purchase staple
- **Product alternative** purchases began to appear

Feb 28 – Feb 29

The week of Feb 28-29 saw a 10% increase in purchases of products used to fight virus

Canned Milk	42.90%
Lamb	15.30%
Seltzers, Tonics, Soda Water	13.40%
Outdoor Grilling	3.90%

C19 Purchase Trends – March-April

March – April Purchase Trends

- **Electronics** for Entertainment and Work
 - Streaming services increase by 93%+
- **“Spring cleaning”** in full effect
 - Lawn & gardening up 45%+ WOW
- **Self-care & Maintenance mode**
 - Hair Clippers, Hair Dye, Nail products

108%
increase in
office
electronics

74%
jump in
Carpet/
Upholstery/
Floor
Cleaning

166%
increase in
hair clipper
purchases

117%
increase in
TV & Home
Theatre

46%
Garden &
Lawn
Supplies

23%
increase in
hair dye
products



POLL QUESTION:

What's been the biggest surprise in C19 consumer purchase behavior so far?

- A) TP/Paper Product Hoarding**
- B) Increase in Home Improvement/Lawn /Gardening Supplies**
- C) Canned Milk/Non-Perishables**
- D) Hair Clippers/Hair Dyes**

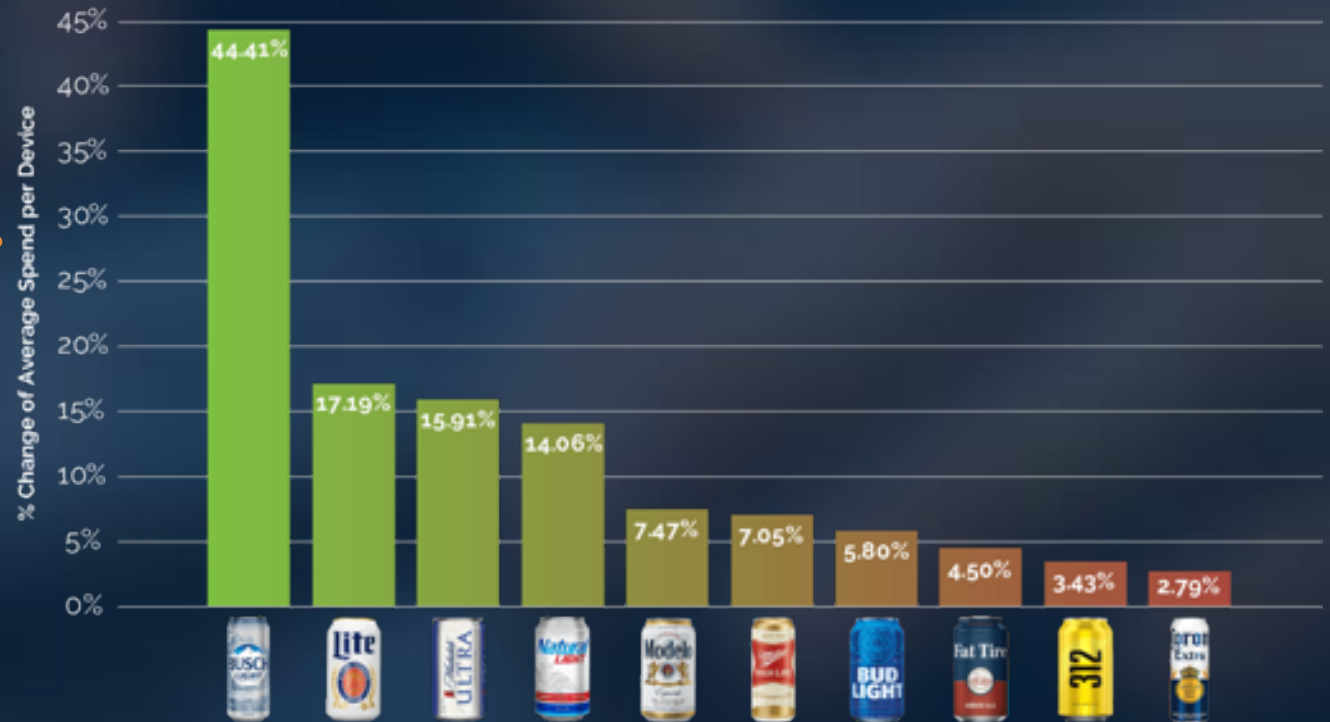
C19 Purchase Data Reveal: Customers Seek Value & Comfort

Purchase trends week over week

3/15/20 - 3/21/20	
Product Category	Change from Previous Week
Dried Fruit	34.9%
Value Beer	29.0%
Seafood	22.2%
Frozen Dinners & Meals	20.0%
Hot Dogs	18.9%
Frozen Seafood	18.8%
Meat	18.2%
FMB / PAB*	16.0%
Frozen Rolls & Wraps	15.3%
Seasoning	14.5%

*Flavored malts beverage/progressive adult beverage

Purchase Trends March – April vs. Feb. 2020



COVID-19 New Normal Marketing Principles



Access real-time data to understand changing trends & customer needs



Meet consumers where they are – at home/online/in-path/in-store



Focus on value-based offerings and products



Stay customer-focused, provide options that make them feel safe (delivery, pick-up and dedicated hours)

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Brief:
COVID-19 Beer Brand Buzz



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COVID-19:
QSRs Impact Report



IN MARKET INSIGHTS

How Is COVID-19 (coronavirus) Affecting Consumer & Shopper Behavior?



**THE COVID-19 Behavioral Curve:
Hoarding, Home, Hope
June 2020**

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THANK YOU

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