



Consumer behavior and sentiment trends in response to COVID-19

How people are staying informed, positive, occupied
and healthy—and the implications for marketers

FACEBOOK

Using qualitative data and insights, we took a look at consumer attitudes across Automotive, Education, Financial Services, Insurance, Real Estate and Restaurants to better understand how the COVID-19 pandemic has impacted consumer shopping habits, media consumption and consumer sentiment.

Recently, some of the fastest growing conversation topics we've seen regarding COVID-19 across the Facebook family of apps and services are related to:

- ✓ Staying informed
- ✓ Staying occupied
- ✓ Staying positive
- ✓ Staying healthy

This qualitative study can serve as a deeper look at consumer feelings around the pandemic. Findings should be considered directional and are not meant to represent broad consumer behavior shifts. Where possible, we validated this research and supplemented it with third-party quantitative findings.



RESEARCH METHODOLOGY

Leveraging an online qualitative discussion platform moderated by third-party research firm 20|20 Research, we asked COVID-19-related questions to consumers active in the six industries over a period in April/May 2020 to derive insights.

The discussion included participants in the US. 50% were from high-impact COVID-19 markets and 50% were from low-impact COVID-19 markets, with a representative distribution of ages and genders.



Staying informed

People are checking the news with increased frequency and across digital

The consumers we surveyed reported that they are checking national and local news online. They are doing so multiple times per day with some viewing daily information about the coronavirus “as necessary as food.” We see in third-party research that 58% reported they were watching and listening to the news more often than usual.¹



In our qualitative research, several participants follow their state’s governor on their respective social media channels (Twitter and Facebook) and watch briefings “live” when they can.

+800M

daily actives are engaging with livestreams on Facebook and Instagram²

People are overwhelmed by the news but feel obligated to be in the know

Participants reported feeling exhausted and overwhelmed by the news yet obligated to be informed—not just for themselves, but to share information with friends and family via different communication channels.



People are hungry for factual, non-politically biased news, and they want to avoid misinformation. For example:

“ It’s more about looking to people I trust—whether that’s news sources I trust or people I know who stay educated with facts.”



HOW MARKETERS CAN RESPOND

- Use your brand voice to help amplify trusted messages from health organizations and limit the spread of misinformation.
- Keep your consumers informed about your own products and updates to your services.
- To help consumers manage information overload, use images, icons and bolder graphics—with “trackers” and “counters”—to deliver quick, helpful visual bites of information.

Staying positive

This is a challenging time emotionally but people are showing empathy for others who have it worse

Some people express feelings of frustration, hopelessness, loneliness and fear about the future. Though, people are maintaining empathy for others who have it worse.

For example:

“ I am feeling worried, anxious and stressed, personally, and for all the people suffering... I am in a position to help people through online meditation and personal development classes. So I volunteer a lot of my time now. It lifts me up to focus on service of others. I try to be positive and see the silver lining.”

People are on a quest for good news and lighter content

From statistics on survival rates and what's working to reunited families to entertainment videos (e.g., concerts, comedians, movies and syndicated TV shows), some people are looking to counter the emotional toll of the pandemic and remind them that life will go on after the coronavirus.

60% say their top priority is staying positive about the situation—even more than ensuring essential items at 52%³

Spending quality time with family is a silver lining

Some people have an opportunity to “carpe diem” and deepen family relationships via quality time cooking meals, eating together, playing video games, watching movies and for a few, watching or making funny videos.

51% say they are having quality time with their household during the outbreak³

“ Since [my family has] been inside for several weeks now, obviously we are spending much more time together. Since we've been inside, as a family, we've gone on a hike... and had family game night. We've also been cooking as a family.”



HOW MARKETERS CAN RESPOND

- Help consumers maintain a positive outlook by offering messages of hope, encouragement and strength without downplaying the situation.
- Share the positive work your company is doing to help employees, those in need and local communities and businesses.
- Provide consumers with the good news and entertainment they are looking for through tips on games to play with the family, recipes, hobbies or activities they can do at home.

Staying occupied

Families are filling the need for at-home entertainment beyond TV

39% say they have found new ways to relieve boredom to adapt to the impact of the coronavirus⁴

5X On Instagram in the US, home workout posts on feed and Stories increased more than 5X in just four days (vs. the four prior)⁵

People are spending more time on video calls

Consumers are checking in with friends and family more frequently and having deeper and longer conversations.

52% are checking in with their friends and family more often⁶

For example:

“ We video chat with family through Facebook Messenger, and use our evening walks outside to call and check on family.”

“ Social media is keeping me connected, too, as people post their boredom-inspired images and creative projects. I’ve also been texting work colleagues more than usual.”



HOW MARKETERS CAN RESPOND

- Help consumers maintain daily habits and overcome boredom by offering free services online or providing activity ideas for individuals, families and kids.
- Provide the connection people are looking for by going live. We’ve seen Facebook Live viewers in the US increase up to 50% from February to March.⁷
- Highlight the relevant products and/or services that your business can provide to help families and individuals manage the day-to-day, occupy their time and share with their friends and family.
- Normalize the new way of life in creative.

Staying healthy

People have concerns about their own and their family's physical and mental health

Consumers often take precautionary measures like physical distancing and washing their hands frequently to prevent illness and exposure to the virus. They are also addressing their mental health. Many people are managing well-being by taking daily walks—having moments of sunshine outdoors and fresh air have become critically important to their well-being.

48% say staying fit and healthy is their priority for the next month, and 46% say maintaining their mental health is a priority⁸

People's financial health is also a concern

Consumers worry about the economy, not just for themselves, but for their communities and for the country.

72% say they believe the pandemic will have a personal financial impact⁹



HOW MARKETERS CAN RESPOND

- Help relieve concerns by sharing the ways your brand has been addressing current challenges head on (e.g., manufacturing supplies) or backing the causes impacted by the COVID-19 pandemic (e.g., supporting local businesses).
- Share tips on managing physical and mental well-being, such as getting outside for daily walks in a safe way, exercising at home and connecting with friends and family.
- People are focused on the now of their lives. Promote products and services that can help people cope with their day or week.
- Share tips on managing finances, if applicable. If your company is giving back to customers, highlight the meaningful products, services or benefits you can offer to help them stay financially healthy (e.g., new financing terms, discounts or deals) or what you're doing to keep them safe (e.g., contactless delivery).





How the COVID-19 pandemic is impacting your industry's consumers

Now that we've looked at some broader trends in consumer sentiment and behavior related to COVID-19, let's take a closer look at how things are changing for your industry specifically and how you can respond effectively in your marketing activities.

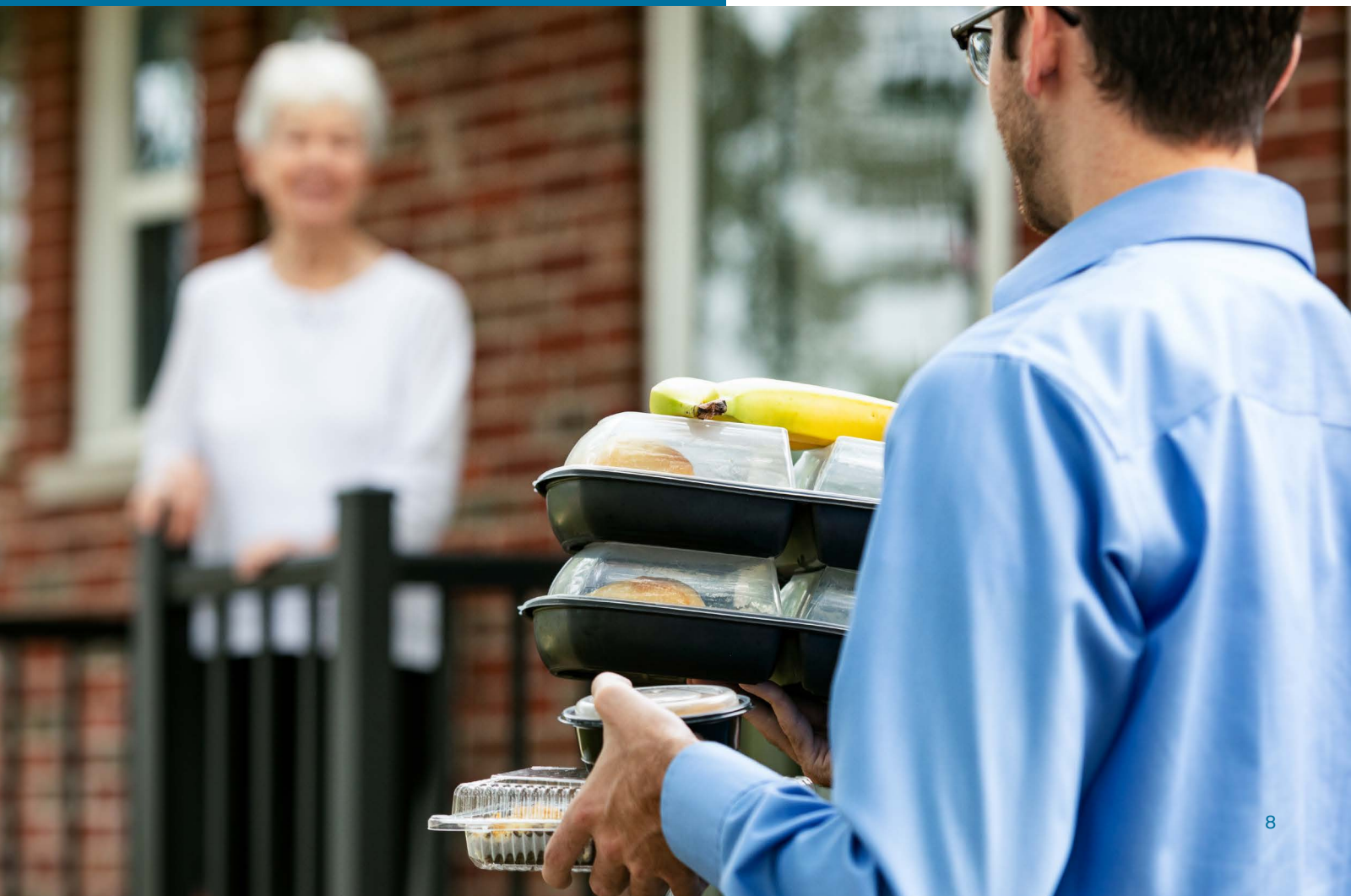
Consumer trends for restaurants



RESEARCH METHODOLOGY

Insights are derived from a qualitative online discussion with a moderator in the US. 50% of participants are from high-impact COVID-19 markets and 50% are from low-impact COVID-19 markets, with a representative distribution of ages and genders.

24 respondents were recruited, all of whom had eaten in a fast food restaurant, purchased pick-up or drive-thru food “to go” from a fast food restaurant, and/or had food delivered from a fast food restaurant within the previous 3 months.



Consumers are pursuing variety

by ordering from restaurants over having home-cooked meals

Consumers say they miss their pre-pandemic routine of dining out one to several times per week (e.g., coffee, lunches and a dinner or two). During shelter-in-place orders, they are cooking more at home, yet face challenges with food shortages from grocery stores and a lack of cooking expertise.

Consumers are seeking variety by ordering takeout and delivery, and are gaining confidence with food delivery services as part of their everyday lives.

“ So much has changed! We are working from home now and eating breakfast and lunch at home always. For dinners we are cooking most nights and maybe eating out 1-2 times a week via food delivery.”



HOW MARKETERS CAN RESPOND

- Focus on messaging that enables dining in vs. dining out: delivery, drive-thru, pick-up and curbside. Consider heroing items that offer the most variety to what people might be cooking regularly at home: Menu items that not only travel well, but are unique and special.
- Partner with third-party food delivery services to explore audience sharing and implement collaborative advertising.



Consumers are receptive to advertising during the COVID-19 pandemic,

but delivering value and adapting to current context is a must

Consumers appreciate and respect companies who are promoting empathetic ads and how they are doing their part to help.

“ I like seeing restaurants advertise during this situation. It makes me feel like the world is still somewhat normal to know that these restaurants are still operating and advertising. I also have a lot of sympathy for restaurants during this time and am happy to see their ads... everyone is in this together and feeling the pain, even large corporations.”

People are focused on the now of their lives and appreciate ads for products and services that will provide them benefits to help them get through the day and/or the week.

“We want to help you” and “We are here to serve you” messages fail to make a consumer connection unless they deliver on the promise and offer benefits such as consumer discounts, free delivery, contactless delivery or other manifestations of the service promise to the customer.

“ It says to me that the business is trying their best to stay in business and to try and adapt to a new economy. For example, pizza companies are really emphasizing contactless delivery, which puts people at ease to let them know the company is taking precautions to ensure their order is the best possible and is clean.”



HOW MARKETERS CAN RESPOND

- Reach your consumers where they are. Consumers are spending time on Facebook Feed, Stories, In-Stream and Messenger. Make sure you're opting in to all placements.
- Strengthen customer loyalty by promoting the products and services that will bring meaningful benefits to them now: Contactless food delivery, mobile pickup, deals, loyalty programs and gift cards
- Consider promoting the acts your company is doing—for example, meal or mask donations, how you're showing empathy for your employees, changes in business processes to protect people, giving back to the local community, support for frontline and essential workers and job openings.
- Maintain your authentic voice and identity through these times, but take caution to not appear tone deaf.

Social distancing and sanitation are top of mind

Consumers are adapting to food pickup and delivery protocol and are sanitizing everything that comes into the house.

“ I think the biggest change is disinfecting everything. For example, I ordered pizza takeout earlier this week and when I got home, I wiped everything down where the pizza boxes touched. I washed my hands as soon as I got home. I am doing everything I can to stop the spread of germs.”

Consumers want to see ads reinforcing this new (hopefully temporary) normal, with social distancing and masks/gloves in place.

“ I am tired of ads from businesses telling me how they will keep me safe—when I see people working [in the ads] without masks.”



HOW MARKETERS CAN RESPOND

- Share messaging surrounding your sanitization practices and business practices to keep workers and patrons safe.
- Restaurants can be at the forefront of recommended cleanliness and sanitation procedures, which extends to every aspect of how the customer experiences your brand throughout their journey. From drive-thru window employee etiquette to delivery safety measures, consumers need to feel food brands are going the extra mile. Messaging then becomes a natural extension of these measures. Practice what you preach in a world where consumers are hyper-aware.

Consumers hope there are lasting behaviors

Asked how to improve restaurant experiences during the COVID-19 pandemic, consumers suggested improvements that they say they hope will last and become part of our national fabric:

- Home cooking with family more often during the week
- Food delivery that picks up from two different restaurants for the same family
- 1-2 min notifications/alerts from all food delivery sources to meet the driver
- Contact-free food delivery
- BOGO meals and family packs
- Beer and wine delivery, contactless
- Steaming hot or freezing cold food delivery, as desired
- Cashier sneeze guards and cash sanitizing
- Supporting local restaurants more
- More email and/or texts from restaurants “staying in touch”
- Restaurants touting their sanitation and cleaning practices
- Cross-pollination between restaurants and food delivery services



HOW MARKETERS CAN RESPOND

- Incorporate any or all of these new norms into messaging.





Sources:

Pages 3–6 source unless otherwise specified: 20|20 Research “Covid-19 Consumer Sentiment” commissioned by Facebook, qualitative interviews with 168 US consumers active in 6 industries, April-May, 2020

Pages 9–12 source unless otherwise specified: 20|20 Research “Covid-19 Consumer Sentiment” commissioned by Facebook, qualitative interviews with 24 US consumers all of whom had eaten in a fast food restaurant, purchased pick up or drive-thru food “to go” from a fast food restaurant, and/or had food delivered from a fast food restaurant within the previous 3 months

1. Nielsen COVID-19 Impact Study, Wave 2, April 1–6 2020, US only.
2. Facebook data, Q1 2020.
3. GWI, Coronavirus research Series 6: Consumer Spending, April 2020, US only.
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5. Instagram data, US only, Mar 15–18, 2020.
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