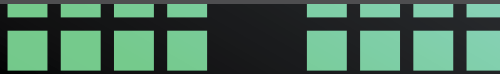


The State Of The US Shopper — COVID-19

Landscape: The Digital Store Playbook

by Sucharita Kodali and Madeline Cyr

July 16, 2020



Why Read This Report

As US states begin to ease COVID-19 restrictions, consumers are still tentative about the prospect of visiting reopened retail locations. This report provides an overview of the state of US consumer retail attitudes based on a survey fielded in May 2020. Retailer executives should use this report to consider how to implement strategy, services, and technology to meet customers' changing expectations.

Key Takeaways

Consumers Are Cautious About Returning To Retail Locations

As retail locations begin to reopen, consumers are concerned about them reopening too quickly. Their fears around contracting and spreading the virus have caused a change to in-store behaviors.

Consumers Are Buying More Online And Experimenting With Curbside

To keep up with increased eCommerce demand, retailers are adding additional curbside and omnichannel fulfillment. Shoppers have mixed feelings on curbside pickup.

When The Pandemic Subsides, Some New Shopping Behaviors Are Likely To Stick

The pandemic has had a huge impact on consumers' existing shopping habits, which may accelerate the changes they make over time. As the pandemic progresses, new habits may stick (most likely those that made their lives easier or better).

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by [Sucharita Kodali](#) and [Madeline Cyr](#)
with [Fiona Swerdlow](#), [Lily Varon](#), and [Nicole Murgia](#)
July 16, 2020

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Related Research Documents

[ForecastView: COVID-19 Retail Scenario Planner, April 2020 \(Global\)](#)

[How 29 Companies Adjusted Policies To Help Customers During The COVID-19 Outbreak](#)

[The Top Retail Technology Investments In 2020](#)



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COVID-19 Has Altered But Not Halted Consumer Shopping

“The biggest misnomer in this whole thing was that [the whole retail] industry was shut down,” notes Simon Property Group CEO David Simon.¹ Despite social distancing practices, regional shutdowns, and the fear surrounding COVID-19 overall, many US consumers are still shopping. In fact, 32% of US online adults indicate that COVID-19 has not changed their shopping behavior.² That said, this group represents a minority of consumers, and we see shopping behavior likely finding a “new normal” equilibrium sometime in the future. With no definitive end point in sight yet for the pandemic, retailers need to be ready to adapt (and readapt) to shifting consumer behaviors.

As Stores Reopen, Foot Traffic Remains Low, But Basket Size And Conversion Are High

As of late May, all 50 US states had at least partially eased COVID-19 restrictions.³ We saw that US consumers were:

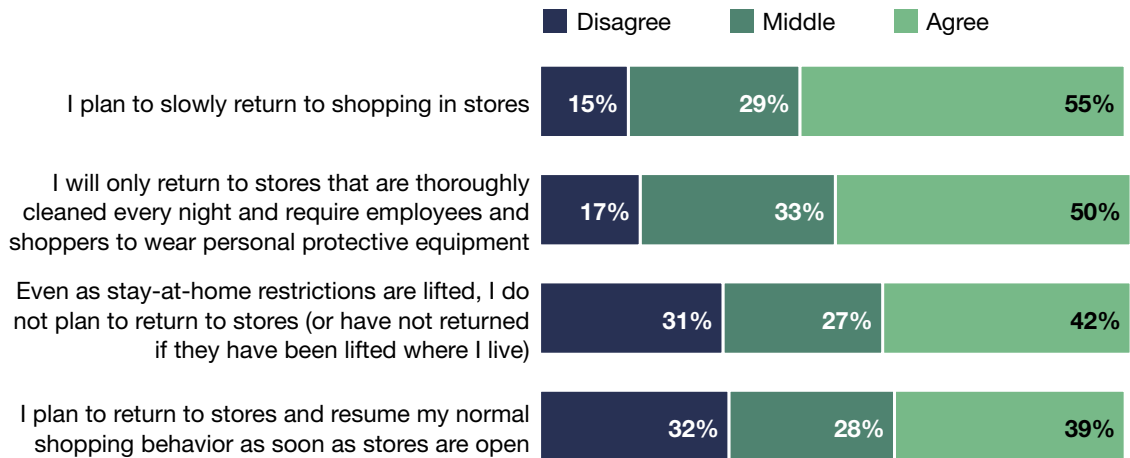
- › **Concerned about an overeager pace for reopening.** In early-opening states like Ohio and Georgia, many consumers were still slow to return to stores.⁴ In May, US online adults noted that their top concerns about getting back to normal were “opening businesses too soon” (39%) and “not taking enough precautions” (38%).⁵
- › **Worried about contracting the virus.** Over half of US online adults planned to return to stores slowly, as consumers fear that they are vulnerable to catching COVID-19. Half of those surveyed said they will only return to stores that are thoroughly cleaned and that require employees and shoppers to wear personal protective equipment (PPE). And 42% said that they will not return to stores, even as stay-at-home orders are lifted (see Figure 1).
- › **Changing their in-store behavior.** “During the quarter, we saw customers consolidate shopping trips and purchase larger baskets in stores, which drove a ticket increase of about 16% while transactions decreased about 6%,” as essential retailer Walmart’s EVP Brett Briggs noted.⁶ After nonessential retailer Crate and Barrel reopened 34 of its retail locations in late May, CEO Neela Montgomery noted, “Traffic is inevitably very much depressed, maybe down more than 60%, but conversion has been very high [. . .] making every (customer) visit count.”⁷

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FIGURE 1 Consumers' Plans To Return To Stores

“Please indicate how strongly you agree or disagree with each of the following statements about shopping during the COVID-19 pandemic.”



Note: Percentages may not total 100 because of rounding.

Base: 1,093 US online adults

Source: Forrester Analytics Consumer Technographics® COVID-19 Survey (Wave 2)

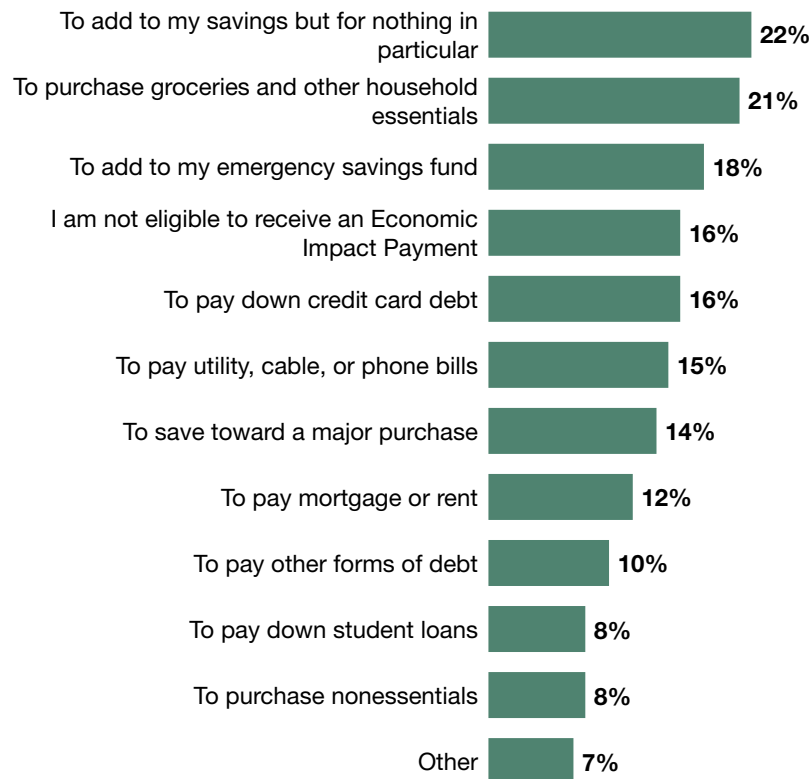
Despite Stimulus Checks, Consumers Are Cautious About Spending On Nonessentials

The economic downturn and uncertainty have caused American consumers to be cautious with their spending habits. In April 2020, 56% of US online adults cut all spending except for essentials, and 40% noted that they are living paycheck to paycheck.⁸ Only 8% used government stimulus checks to purchase nonessentials. Some of the most common ways US online adults said they were using their stimulus check were to add it to their savings, to purchase essentials, or to pay down debt (see Figure 2).

Retailers like Walgreens also reported that spending in nonessential categories decreased during March, April, and May.⁹ However, one sector that straddles essential and nonessential goods has fared well during the pandemic: the home sector. The Home Depot saw double-digit comp sales growth around home improvements, Wayfair saw acceleration in home office furniture, and Crate and Barrel sold more bread makers in April than it sold in all of 2019.¹⁰

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FIGURE 2 Economic Stimulus Checks Are Mostly Being Saved Or Used To Purchase Essentials**“How have you used, or do you plan to use, your Economic Impact Payment (stimulus check) from the COVID-19 pandemic?”**

Base: 1,093 US online adults

Source: Forrester Analytics Consumer Technographics® COVID-19 Survey (Wave 2)

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Consumers Continue To Shop Online And Have Mixed Feelings About Curbside Pickup

Fully 84% of US online adults are buying the same amount or more online because of COVID-19 (see Figure 3). Retailers with a strong eCommerce presence like Wayfair have been able to retain sales, and some have even flourished.¹¹ In Walmart's May earnings call, CEO Doug McMillon noted that the company's eCommerce business grew by 74% "as customers opted for greater convenience and increased social distancing."¹²

To support rapidly growing online sales, retailers have quickly expanded and innovated with their omnichannel fulfillment programs. Not all services will have long-term staying power, however. For example, only 23% of US online adults who paid for same-day delivery during the COVID-19 pandemic expect to do so again after the stay-at-home restrictions are lifted.¹³ By contrast, we see that curbside delivery in particular:

- › **Worked well for some retailers.** Best Buy moved all of its stores to a contactless curbside model proactively on March 22. This strategy paid off, as CEO Corie Barry notes: "We retained 81% of last year's sales during the last six weeks of the quarter as we operated in the new model [. . .] even though not a single customer set foot in our stores."¹⁴ During the six weeks that Best Buy ran its curbside-only model, the company saw domestic year-over-year online sales increase by a whopping 300%.
- › **Still has mixed responses from consumers.** Ultimately, 37% of US online adults would rather go to the store than deal with curbside, while 33% would rather use curbside or in-store pickup than shop in the store or use delivery (see Figure 4).

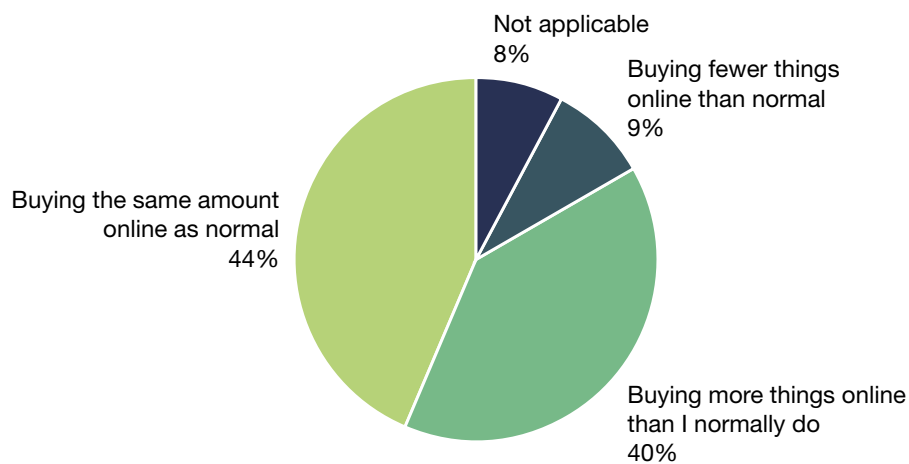
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FIGURE 3 Online Spending During COVID-19

“With respect to online shopping, with which of the following do you agree?”

“As a result of COVID-19, I have been . . . ”



Note: Percentages do not total 100 because of rounding.

Base: 1,093 US online adults

Source: Forrester Analytics Consumer Technographics® COVID-19 Survey (Wave 2)

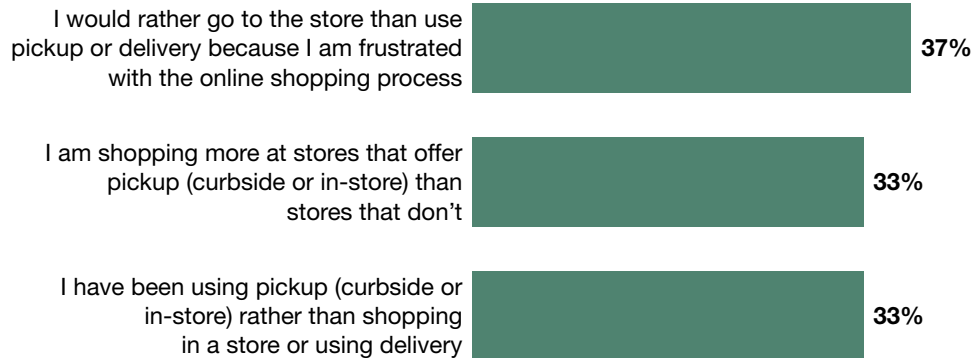
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FIGURE 4 Curbside Pickup Preferences Vary

“Please indicate how strongly you agree or disagree with each of the following statements about shopping during the COVID-19 pandemic.”

(4 or 5 on a scale of 1 [strongly disagree] to 5 [strongly agree])



Base: 1,093 US online adults

Source: Forrester Analytics Consumer Technographics® COVID-19 Survey (Wave 2)

Online Grocery Shopping May Finally Grow

In April, 21% of US online adults noted that they had bought groceries online for the first time because of the pandemic.¹⁵ The 2020 pandemic may have cracked many US consumers' long-standing reluctance to order groceries online. In 2018, surveyed US online adults cited their perceived top barriers to doing so as preferring to select their own fresh foods, avoiding the cost of delivery, and believing that they get groceries faster by going to the store.¹⁶ Fast-forward to mid-2020: US online adults' fears that they or someone they know will get sick have abated somewhat from April (56%) to May (48%), but exposure to infection is still a top concern.¹⁷

As an essential category, grocers in the US have had to quickly adjust in-store and online shopping services. Many were unprepared for the consumer demand surge (including Amazon) — especially in the midst of inventory shortages, delivery availability, and new protocols for everything from cleaning to capacity and staffing.¹⁸ Delivery will continue to be an issue for grocers. For example, willingness to pay for grocery delivery has clear splits across generational divides. Among US online adults, 40% of Millennials are willing to pay for delivery of grocery items, compared to only 14% of Baby Boomers (see Figure 5).

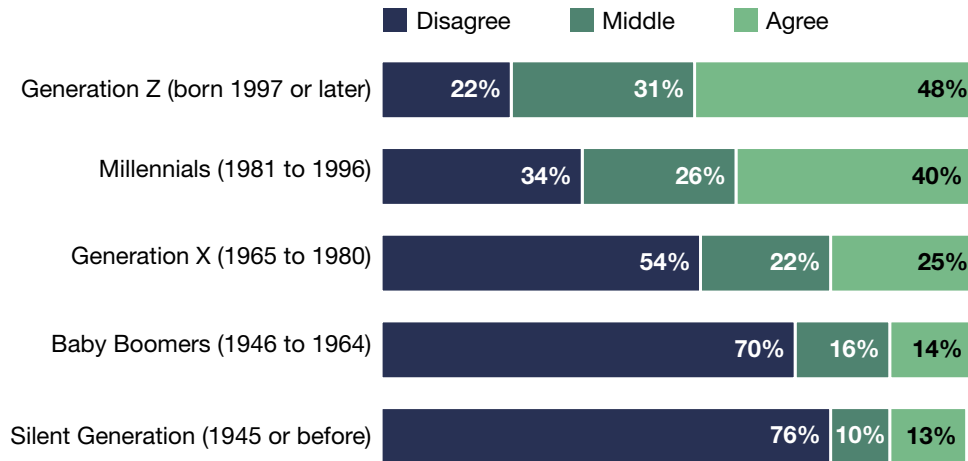
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FIGURE 5 Consumers Are Split On Paying For Grocery Delivery

“Please indicate how strongly you agree or disagree with each of the following statements about shopping during the COVID-19 pandemic.”

(“I am willing to pay for delivery of grocery items.”)



Note: Percentages may not total 100 because of rounding.

Base: 1,093 US online adults

Source: Forrester Analytics Consumer Technographics® COVID-19 Survey (Wave 2)

COVID-19 Fears Have Spurred Some Consumer Interest In Contactless Payments

In April, 19% of US online adults noted that they were using contactless payment more to avoid touching screens and hardware in stores.¹⁹ In May, 12% of US online adults said they had used their phone to make contactless payments in stores for the first time during the COVID-19 pandemic, and 10% used their credit card for contactless payments for the first time.²⁰ As Apple CFO Luca Maestri notes: “In essential sectors such as grocery and financial services, we’re seeing organizations adopt our technology to better serve their customers safely. Leading grocers around the world like Trader Joe’s, Woolworths, Lawsons, Sainsbury’s, Lidl, and Carrefour offer Apple Pay so customers can use contactless payments.”²¹

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Some New Shopping Behaviors May Stick Longer-Term

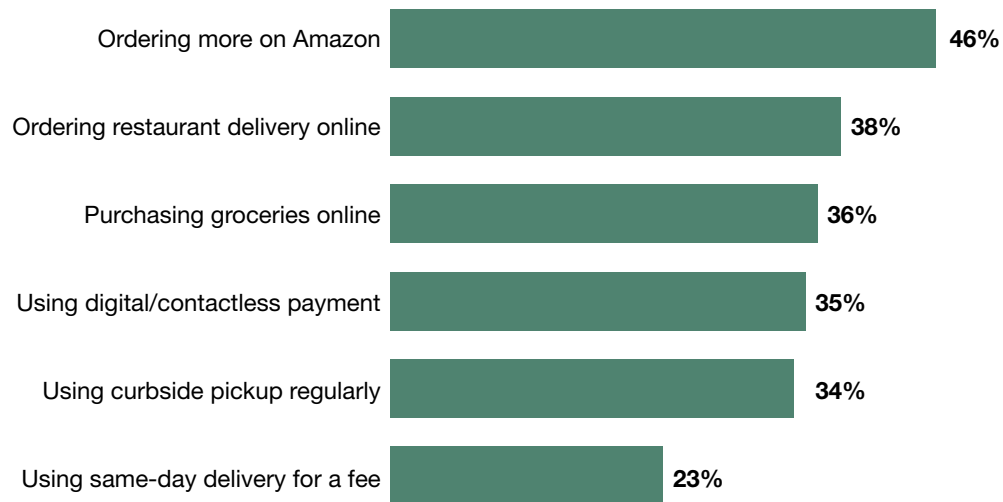
The pandemic has been a shock to existing shopping habits for consumers, which may accelerate changes that consumers make over time.²² As the pandemic progresses, US online consumers themselves expect that some of these new habits may stick (most likely those that made their lives easier or better), including:

- › **Buying more on Amazon.** Of the US online adults who bought more on Amazon during the pandemic than they had before, 46% expect they will continue to do so after the pandemic ends (see Figure 6). Amazon indicated that it has seen a shift in demand toward essential items: “Beginning in early March, we experienced a major surge in customer demand, particularly for household staples and other essential products across categories such as health and personal care, groceries, and even home office supplies.”²³
- › **Ordering groceries and restaurant food online.** Thirty-eight percent of US online adults who started ordering restaurant delivery during the pandemic anticipate continuing this habit in the future. Similarly, 36% of online adults who started buying groceries online during the pandemic expect to do so in the future.²⁴ In the US, Ahold Delhaize saw eCommerce growth of 42% in Q1 2020, and by the end of 2020, it plans to add 50% more capacity in its system and have 80% availability of stock items on its branded eCommerce site.²⁵
- › **Paying via contactless methods.** Thirty-five percent of US online adults who started using digital or contactless payments during the pandemic expect to continue to do so once stay-at-home-restrictions are lifted.²⁶ Mastercard president Michael Miebach is bullish on contactless use growing further, noting, “We have seen over 40% growth in contactless transactions worldwide in the first quarter.”²⁷
- › **Using curbside pickup.** Of the US online adults who started using curbside pickup regularly during the COVID-19 pandemic, 34% anticipate continuing to use this service in the future.²⁸ Many retailers are investing in multiple omnichannel fulfillment services for the long term. Bed Bath & Beyond CEO Mark Tritton notes, “We now plan to invest about \$250 million, focusing on our core business and key projects that support the omnichannel future of our company in 2020 and beyond, which are more relevant than ever such as our digital and omni fulfillment capabilities, including BOPIS.”²⁹

FIGURE 6 Consumers Indicated Which Shopping Activities They Are Likely To Continue After The Pandemic

“Thinking about the activities that you have started doing during the COVID-19 pandemic, please indicate how likely you are to continue doing the following once stay-at-home restrictions are lifted.”

(Survey respondents who answered “likely” or “very likely”)



Base: 1,093 US online adults

Source: Forrester Analytics Consumer Technographics® COVID-19 Survey (Wave 2)

Recommendations

Customers Are Clear About What They Want; Retailers Must Deliver

In light of COVID-19, shopper behavior is shifting quickly. Retailers need to meet continually evolving consumer expectations while planning for the “new normal” by:

- › **Continuing to be cautious about digital payments.** Despite a bump in usage as a result of the pandemic, adoption of digital payments in the US is still low, and, therefore, it is not a guaranteed home run there. By contrast, European markets seem to be further along the contactless payments adoption curve.
- › **Executing curbside well.** Shoppers do like curbside, and when well-executed for essentials, groceries, or restaurants, it is a driver of customer delight. Best practices include letting customers know when orders are ready, ensuring that orders are accurate with few substitutions or cancellations, and a fast and contactless load-to-trunk process that does not keep shoppers waiting.

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- › **Focusing on digital and eCommerce excellence.** If retailers have not mastered eCommerce, now is the time to ensure that your online retail site is easy to use and bug-free. The most advanced online retailers are gathering data, expanding their drop-ship assortments, and piloting new digital marketing tactics like shoppable video to maintain relationships with their customers.

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Supplemental Material

Survey Methodology

The Forrester Analytics Consumer Technographics® COVID-19 Survey (Wave 2) was fielded from May 8 to May 15, 2020. This online survey included 1,093 respondents in the US and 1,120 respondents in Canada between the ages of 18 and 88. For results based on a randomly chosen sample of this size, there is 95% confidence that the results have a statistical precision of plus or minus 3.0% in the US and 2.9% in Canada.

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Forrester weighted the data by age and gender. The survey sample size, when weighted, was 1,093 in the US and 1,120 in Canada. (Note: Weighted sample sizes can be different from the actual number of respondents to account for individuals generally underrepresented in online panels.) The programming language herein reflects the survey respondent base for each question. Bases for specific questions have been changed in published data for increased clarity. Therefore, the base in published data may not match the base language in this document. Dynata fielded this survey on behalf of Forrester. Survey respondent incentives included points redeemable for gift certificates.

The Forrester Analytics Consumer Technographics COVID-19 Survey (Wave 1) was fielded from April 10 to April 15, 2020. This online survey included 1,122 respondents in the US and 1,119 respondents in Canada between the ages of 18 and 88. For results based on a randomly chosen sample of this size, there is 95% confidence that the results have a statistical precision of plus or minus 2.9%.

Forrester weighted the data by age and gender. The survey sample size, when weighted, was 1,122 in the US and 1,119 in Canada. (Note: Weighted sample sizes can be different from the actual number of respondents to account for individuals generally underrepresented in online panels.) The programming language herein reflects the survey respondent base for each question. Bases for specific questions have been changed in published data for increased clarity. Therefore, the base in published data may not match the base language in this document. Dynata fielded this survey on behalf of Forrester. Survey respondent incentives included points redeemable for gift certificates.

For Technographics Clients: How To Get More Technographics Data Insights

The Forrester Analytics Consumer Technographics COVID-19 surveys of US and Canadian online adults include many additional questions and parameters by which you can analyze the data contained in this report.

We can provide additional insights about the consumers highlighted in this report:

- › Who they are (e.g., demographics, lifestyle, and interests).
- › What they do (e.g., digital, mobile, and social behaviors).
- › Affiliations they have (e.g., brands used or products owned).
- › How they feel (e.g., attitudes or interests).

If you wish to subscribe to Forrester's Consumer Technographics services, please contact your account manager or data@forrester.com. If you are an existing Technographics client, please contact your data advisor at data@forrester.com.

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Endnotes

- ¹ Source: “Simon Property Group Inc (SPG) Q1 2020 Earnings Call Transcript,” The Motley Fool, May 12, 2020 (<https://www.fool.com/earnings/call-transcripts/2020/05/12/simon-property-group-inc-spg-q1-2020-earnings-call.aspx>).
- ² Source: Forrester Analytics Consumer Technographics COVID-19 Survey (Wave 2).
- ³ Source: Sarah Mervosh and Amy Harmon, “All 50 States Are Now Reopening. But at What Cost?” The New York Times, May 26, 2020 (<https://www.nytimes.com/2020/05/20/us/coronavirus-reopening-50-states.html>).
- ⁴ Source: Mark Williams, “Shoppers slow to return as stores reopen in age of coronavirus,” The Columbus Dispatch, May 13, 2020 (<https://www.dispatch.com/business/20200512/shoppers-slow-to-return-as-stores-reopen-in-age-of-coronavirus>).
- ⁵ Source: Forrester Analytics Consumer Technographics COVID-19 Survey (Wave 2).
- ⁶ Source: “Walmart, Inc. (WMT) CEO Doug McMillon on Q1 2021 Results - Earnings Call Transcript,” Seeking Alpha, May 19, 2020 (<https://seekingalpha.com/article/4348814-walmart-inc-wmt-ceo-doug-mcmillon-on-q1-2021-results-earnings-call-transcript?part=single>).
- ⁷ Source: Powell Slaughter, “Crate and Barrel CEO on managing through COVID-19,” Furniture Today, May 22, 2020 (<https://www.furnituretoday.com/furniture-retailing/crate-and-barrel-ceo-on-managing-through-covid-10/>).
- ⁸ Source: Forrester Analytics Consumer Technographics COVID-19 Survey (Wave 1).
- ⁹ Alex Gourlay, co-COO of Walgreens, noted in April, “We’ve seen strong growth in many essential categories [and] we have noticed less consumer spending in discretionary items such as beauty, photographic, and seasonal.” Source: “Walgreens Boots Alliance, Inc. (WBA) CEO Stefano Pessina on Q2 2020 Results - Earnings Call Transcript,” Seeking Alpha, April 2, 2020 (<https://seekingalpha.com/article/4335718-walgreens-boots-alliance-inc-wba-ceo-stefano-pessina-on-q2-2020-results-earnings-call?part=single>).
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- ¹¹ Wayfair had a particularly strong quarter, as its CEO notes: “What we’ve seen is millions of customers who had not been previous online shoppers in the category to come online and buy [. . .] and we think that a portion of their spend in the future will remain online.” Source: “Wayfair Inc. (W) CEO Niraj Shah on Q1 2020 Results - Earnings Call Transcript,” Seeking Alpha, May 5, 2020 (<https://seekingalpha.com/article/4343194-wayfair-inc-w-ceo-niraj-shah-on-q1-2020-results-earnings-call-transcript?part=single>).
- ¹² Source: “Walmart, Inc. (WMT) CEO Doug McMillon on Q1 2021 Results - Earnings Call Transcript,” Seeking Alpha, May 19, 2020 (<https://seekingalpha.com/article/4348814-walmart-inc-wmt-ceo-doug-mcmillon-on-q1-2021-results-earnings-call-transcript?part=single>).
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- ¹⁴ Source: “Best Buy Co., Inc. (BBY) CEO Corie Barry on Q1 2021 Results - Earnings Call Transcript,” Seeking Alpha, May 21, 2020 (<https://seekingalpha.com/article/4349382-best-buy-co-inc-bby-ceo-corie-barry-on-q1-2021-results-earnings-call-transcript?part=single>).
- ¹⁵ Source: Forrester Analytics Consumer Technographics COVID-19 Survey (Wave 1).
- ¹⁶ Source: Forrester Analytics Consumer Technographics North American Retail And Travel Benchmark Recontact 1 Survey, 2018 (US).

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¹⁷ Source: Forrester Analytics Consumer Technographics COVID-19 Survey (Wave 2) and Forrester Analytics Consumer Technographics COVID-19 Survey (Wave 1).

¹⁸ Amazon acknowledged it had problems handling the increased demand for online grocery. In April the company noted, “While we have increased order capacity by more than 60% due to COVID-19, we still expect the combination of customer demand and restricted capacity due to social distancing will continue to make finding available delivery windows challenging for customers.” Source: Stephenie Landry, “New ways we’re getting groceries to people during the COVID-19 crisis,” The Amazon Blog, April 12, 2020 (<https://blog.aboutamazon.com/company-news/new-ways-were-getting-groceries-to-people-during-the-covid-19-crisis>).

¹⁹ Source: Forrester Analytics Consumer Technographics COVID-19 Survey (Wave 1).

²⁰ Source: Forrester Analytics Consumer Technographics COVID-19 Survey (Wave 2).

²¹ Source: “Apple Inc. (AAPL) Q2 2020 Earnings Call Transcript,” The Motley Fool, April 30, 2020 (<https://www.fool.com/earnings/call-transcripts/2020/04/30/apple-inc-aapl-q2-2020-earnings-call-transcript.aspx>).

²² See the Forrester report “[The State Of US Consumers And Technology, 2019.](#)”

²³ Source: “Amazon.com, Inc. (AMZN) Q1 2020 Results - Earnings Call Transcript,” Seeking Alpha, April 30, 2020 (<https://seekingalpha.com/article/4341815-amazon-com-inc-amzn-q1-2020-results-earnings-call-transcript?part=single>).

²⁴ Source: Forrester Analytics Consumer Technographics COVID-19 Survey (Wave 2).

²⁵ Source: “Koninklijke Ahold Delhaize NV (ADRNY) CEO Frans Muller on Q1 2020 Results - Earnings Call Transcript,” Seeking Alpha, May 9, 2020 (<https://seekingalpha.com/article/4345359-koninklijke-ahold-delhaize-nv-adrny-ceo-frans-muller-on-q1-2020-results-earnings-call?part=single>) and “Ahold Delhaize Q1 2020 results,” Ahold Delhaize, May 7, 2020 (<https://www.aholddelhaize.com/en/media/latest/media-releases/ahold-delhaize-q1-2020-results/>).

²⁶ Source: Forrester Analytics Consumer Technographics COVID-19 Survey (Wave 2).

²⁷ Source: “Mastercard Incorporated (MA) CEO Ajay Banga on Q1 2020 Results - Earnings Call Transcript,” Seeking Alpha, April 29, 2020 (<https://seekingalpha.com/article/4341216-mastercard-incorporated-ma-ceo-ajay-banga-on-q1-2020-results-earnings-call-transcript?part=single>).

²⁸ Source: Forrester Analytics Consumer Technographics COVID-19 Survey (Wave 2).

²⁹ Source: “Bed Bath & Beyond Inc. (BBBY) CEO Mark Tritton on Q4 2019 Results - Earnings Call Transcript,” Seeking Alpha, April 15, 2020 (<https://seekingalpha.com/article/4337856-bed-bath-beyond-inc-bbby-ceo-mark-tritton-on-q4-2019-results-earnings-call-transcript?part=single>).

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