Coronavirus: the impact on consumers worldwide

Wave 2

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Chase Buckle

Trends Manager

Katie Gilsenan

Consumer Insights Manager

Coronavirus research hub

globalwebindex.com/coronavirus

Submit your questions

trends@globalwebindex.com

Talking points

Who is GlobalWebIndex?

Leading provider of consumer insights, and home of the world's largest study on the digital consumer.

GlobalWebIndex

46
Countries

550k +
Interviews per year

22M+
Panelists

40,000 + datapoints, 360 degree view of digital life

Demographics

Attitudes & lifestyle

Device ownership & access

Online activities & behaviors

Brand

Apps & social media

Commerce

Marketing touchpoints

Segmentations

Media consumption

Methodology

17

Global markets

Australia, Brazil, Canada, China, France, Germany, India, Ireland, Italy, Japan, New Zealand, Philippines, Singapore, South Africa, Spain, UK, and the U.S

15,079

Respondents surveyed

16-64

Year old internet users

March 31 - April 2

Fieldwork dates

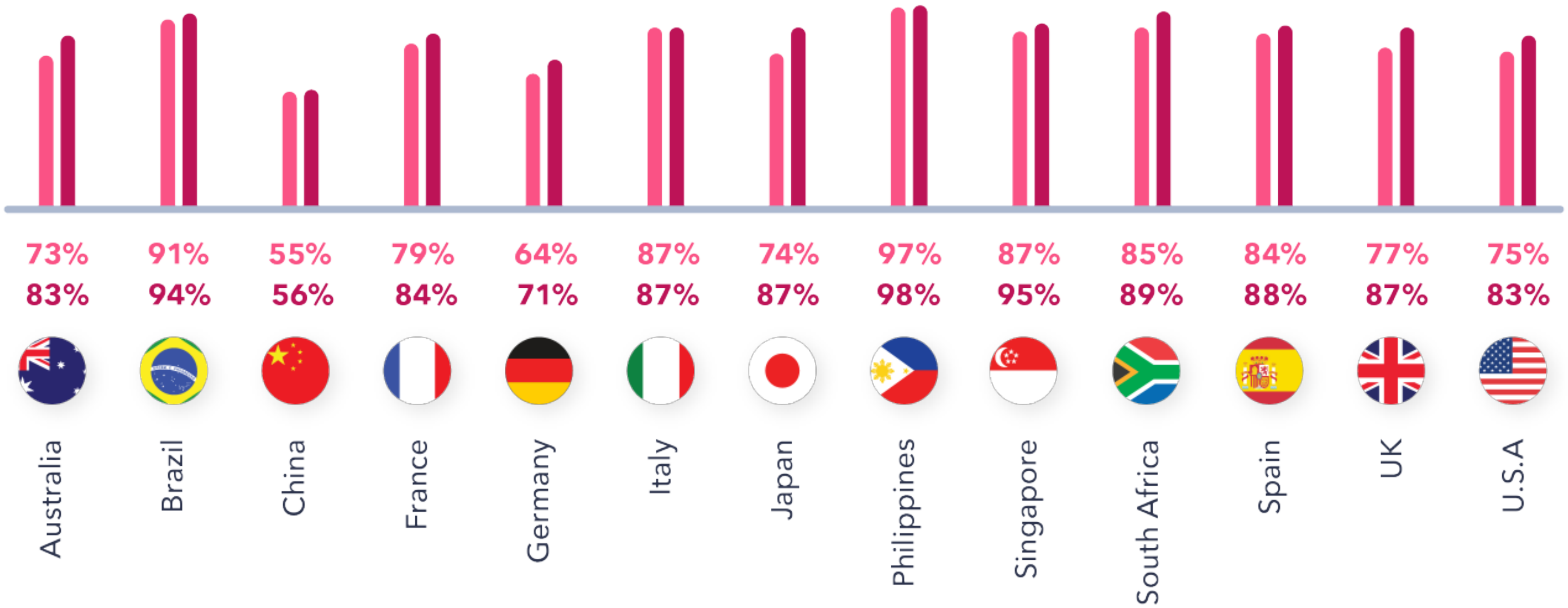
How have concerns changed?

Levels of concern locally is on the rise, but China is still the exception

% who say they feel **extremely, very, or quite concerned** about the situation in their own country

Wave 1 (March 16-20)

Wave 2 (March 31-April 2)



Concerns at a global and local level are becoming more equal in many markets

Country stage in pandemic

- Decline
- Growth
- Accelerated growth
- Peak
- Stable

More concerned about global

- China (+31)
- New Zealand (+11)
- Germany (+9)
- Australia (+8)
- Singapore (+5)
- Japan (+4)
- Canada (+4)

Equally concerned

- UK (+3)
- Ireland (+3)
- Italy (+3)
- France (+2)
- Brazil (+1)
- India (+1)
- Philippines (+1)
- South Africa (+1)
- Spain (+1)
- USA (+0)

China, again is the outlier, and remains more concerned about the global situation than the situation in their own country (87% vs. 56%)

Japan, Singapore, and Brazil's global and local concerns have become considerably more equal since wave 1

But the global outbreak is still expected to last longer, and it's increasing in duration

Average number of months internet users **expect the outbreak to last** globally/in their own country

	Australia	Brazil	Canada	China	France	Germany	India	Ireland	Italy	Japan	New Zealand	Philippines	Singapore	South Africa	Spain	UK	U.S.A
Globally	8.6	6.2	7.6	6.1	6.4	8.4	5.1	8.4	7.5	9.0	9.1	6.5	9.0	7.8	7.4	8.8	7.2
Change since wave 1	+0.9	+0.3	-	+0.6	+0.8	+0.5	-	-	+0.1	+1.5	-	+0.3	+0.2	+0.3	+0.7	+0.8	+0.7
Own country	6.1	3.9	5.0	2.7	3.7	5.8	2.9	5.5	4.2	7.4	5.6	4.1	7.1	5.5	4.0	6.2	5.0
Change since wave 1	+0.5	+0.0	-	+0.4	+0.8	+0.4	-	-	+0.3	+2.0	-	+0.4	+0.2	+0.1	+0.6	+0.4	+0.8

Local optimism remains high overall, but this dips steeply for Japan

% who feel **optimistic that their country/the world will overcome** the coronavirus outbreak

	Australia	Brazil	Canada	China	France	Germany	India	Ireland	Italy	Japan	New Zealand	Philippines	Singapore	South Africa	Spain	UK	U.S.A
Globally	43%	43%	42%	39%	27%	15%	72%	46%	43%	5%	38%	82%	36%	62%	34%	48%	53%
Local	61%	37%	58%	93%	36%	43%	79%	61%	53%	7%	72%	75%	64%	51%	41%	56%	59%

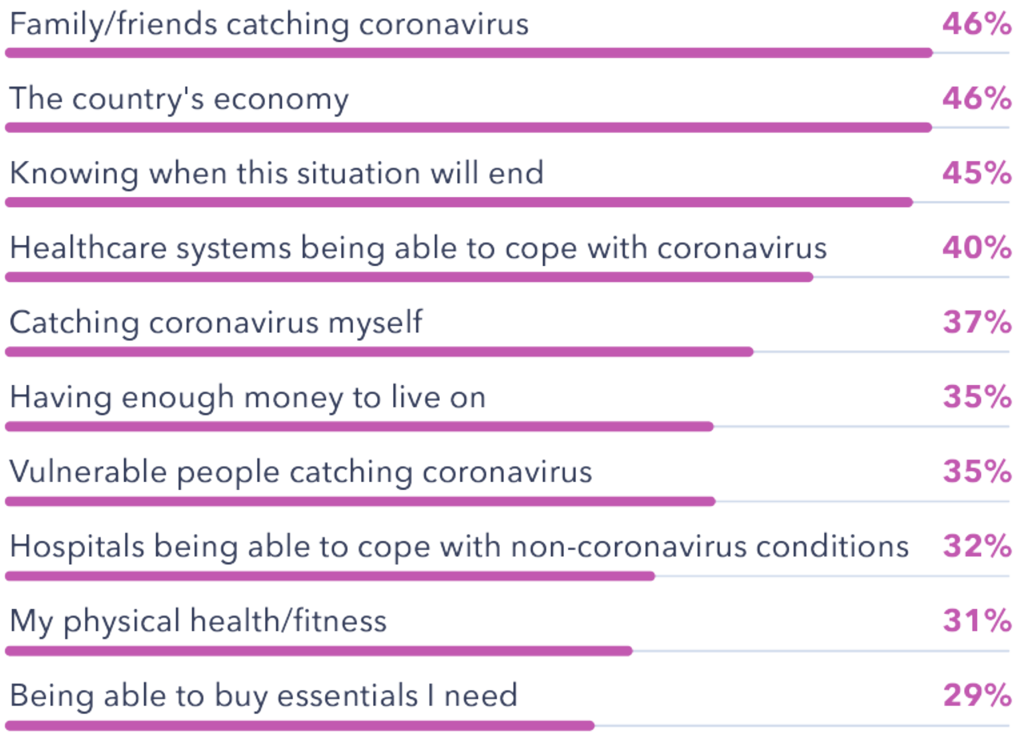
China remains highly optimistic about the local situation compared to global. Japan, Spain, and France are the only countries that noticeably declined in optimism (>3%) at a local level since wave 1.

Optimism at a global level has either declined or stayed the same in most markets – most significant declines are in Spain, Australia, France, Germany, and Japan.

What's driving consumers' concerns?

Friends/family, the economy, and healthcare systems are some of the biggest concerns

% who say they're **concerned about** the following at the moment



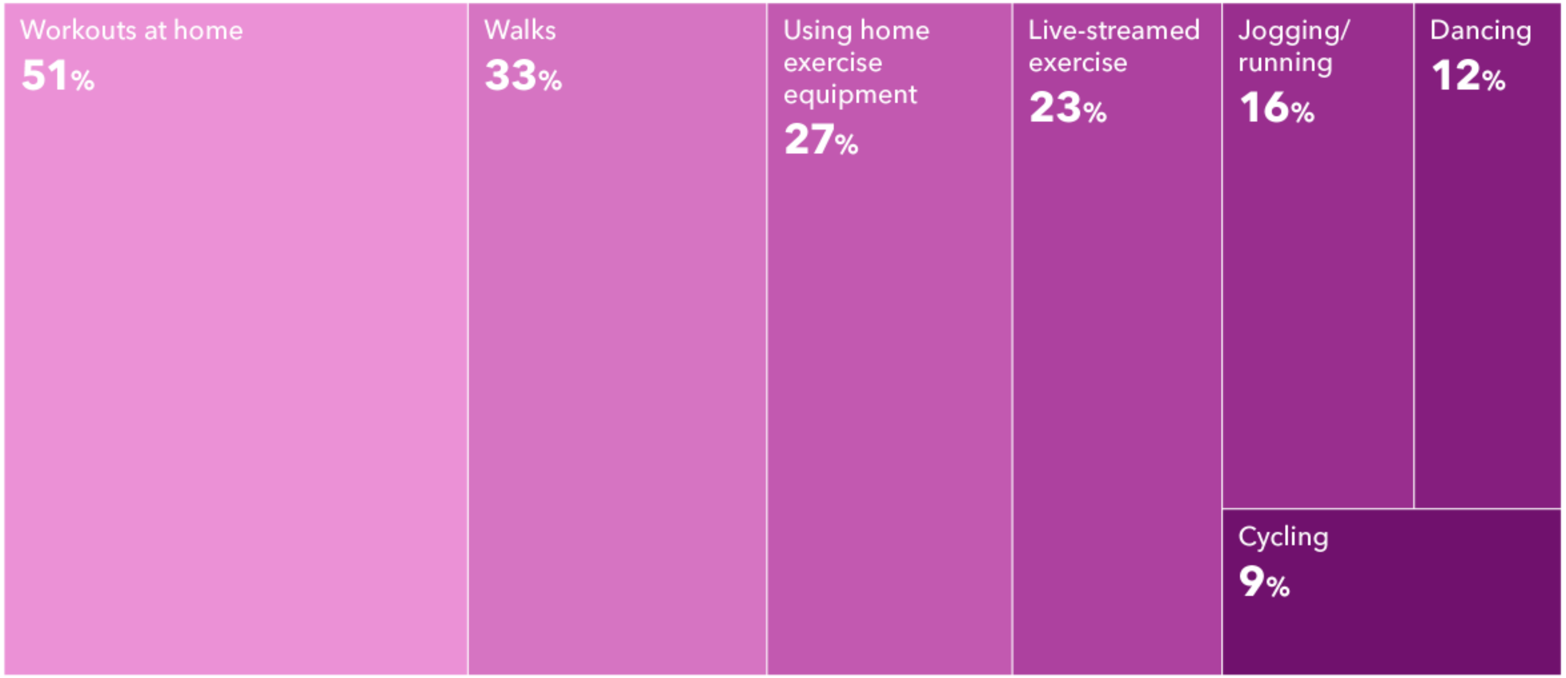
Gen Z are more concerned than other generations about their mental wellbeing (28%) and feeling lonely/cut-off (20%)

Boomers are more concerned about catching coronavirus, about knowing when the situation will end, and about hospitals not being able to cope

42% of consumers with self-reported health conditions worry about catching the virus

Exercise is key for majority of consumers at this time

% who say they're doing the following **types of exercise**/keep-fit activities during the outbreak



85%

globally are doing some form of exercise during the outbreak

Global economy continues to be the most impacted

% who say the outbreak will have a **big/dramatic effect on...**	**Global economy**	**Local economy**	**My personal finances**
	87%	**78%**	**38%**
By country	**97%** Philippines	**96%** Philippines	**81%** Philippines
	94% New Zealand	**93%** Spain	**58%** South Africa
	93% Australia, Ireland, Singapore, Spain	**92%** New Zealand	**54%** India

Across most markets, concern about impact on household finances is growing since wave 1, but global outlook is still expected to be worse

Concerns at a local level are also growing, with notable increases in Australia, Germany, Singapore, and the UK

35% of baby boomers expect a big/dramatic impact on their personal finances compared to 83% for their country's economy

How purchasing is changing

Growth of online shopping – peaks in China

% who say they're **doing the following...**

47%

Spending a lot/a little more time shopping online

+ China **67%**
+ Singapore **47%**
- New Zealand **16%**

21%

Say their online shopping habits haven't changed

+ Japan **54%**
+ Germany **49%**

17%

Spending a lot/a little less time shopping online

+ Philippines **33%**
+ India **31%**
+ New Zealand **26%**

Gen Z and millennials are most likely to say they're shopping more online, while boomers are more likely to say their habits haven't changed

Higher-income groups more likely to be shopping online a lot more than lower-income groups (32% vs. 18%)

Increases in online shopping focused on essentials

% who are shopping more online who say they're **buying more** of the following…

71% in China

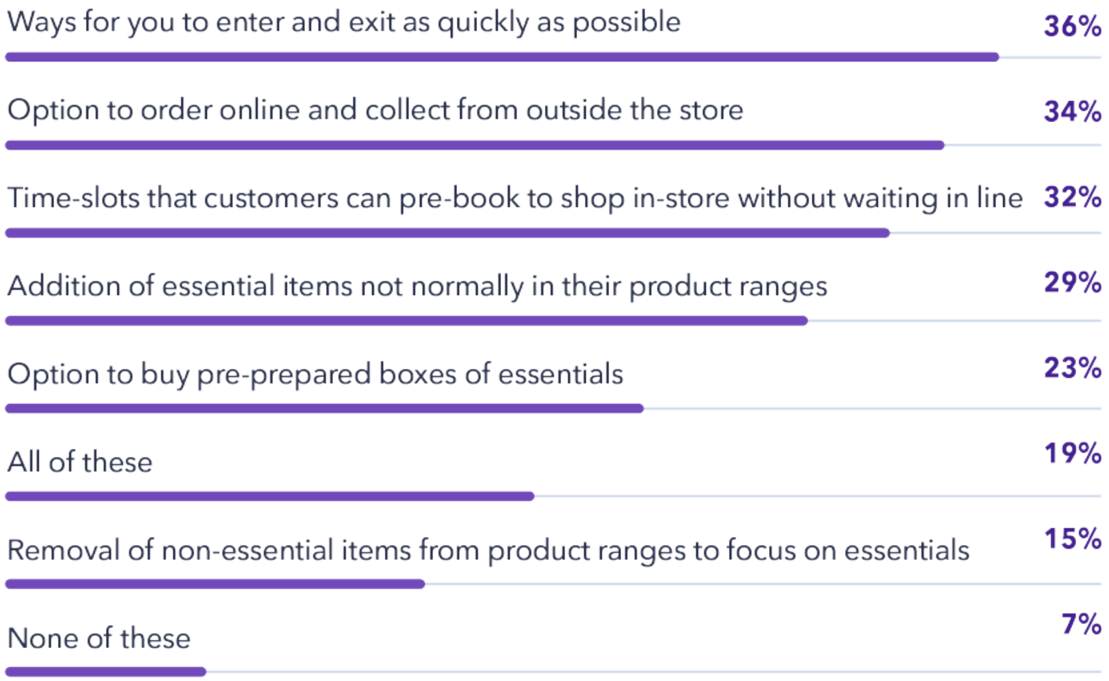
Over half in the U.S

Close to half of **Gen Z** and 2 in 5 of both **higher and lower income earners** are shopping more online for clothes. But among those who are shopping ***less*** online – clothing category is the worst hit

Around 1 in 5 **millennials, Gen X, and boomers** are shopping more for alcohol

Consumers value safety and convenience from essential stores

% who say they would like to **see the following from essential stores**



2 in 5 in Ireland, Italy, New Zealand, and South Africa want to be able to order online and collect outside the store

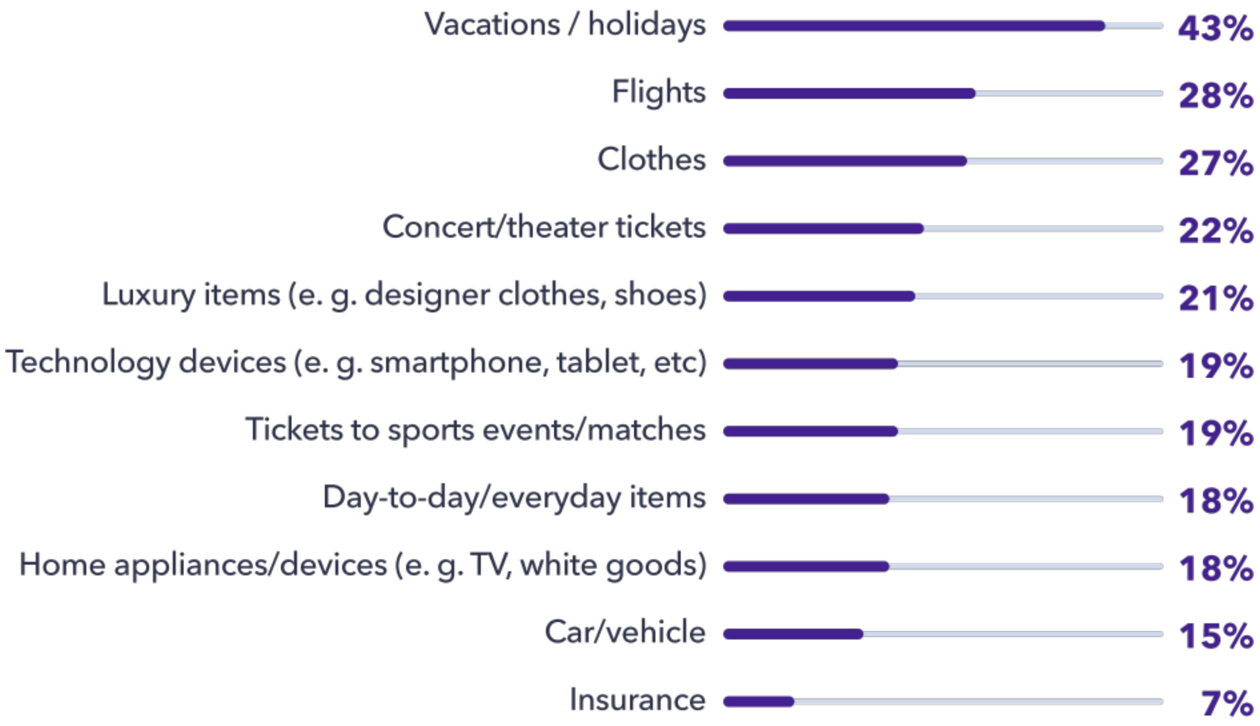
39% in China

Around **1 in 3** in Japan and Germany

All generations value safety, but Gen Z and millennials prioritize **convenience such as picking up items outside the store, time-slots, and pre-prepared boxes** more than older generations

Travel purchases take the hardest hit

% who say they've **delayed purchasing** the following as a result of the coronavirus outbreak



Singapore **3 in 5**

Over half In China and Ireland

Ireland **43%**

Singapore **43%**

India **33%**

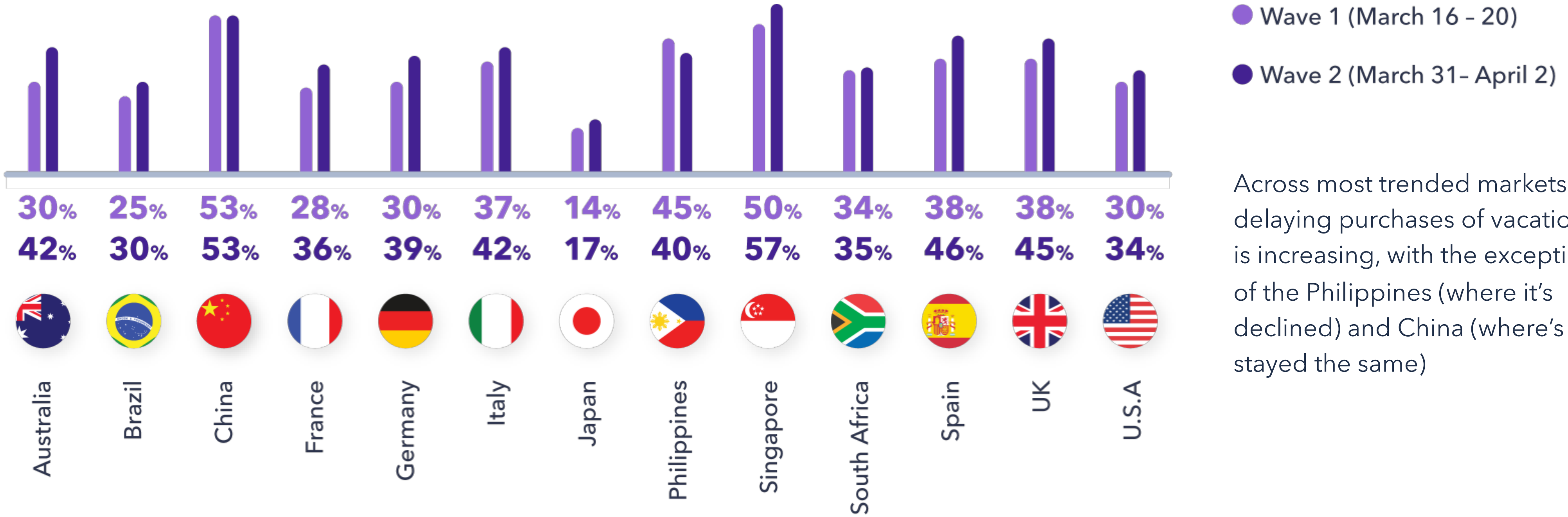
S.Africa **25%**

China **24%**

Gen Z and millennials more likely to be delaying purchases across most categories – notably 1 in 4 Gen Z are delaying purchasing technology devices like smartphones

The impact on travel over time

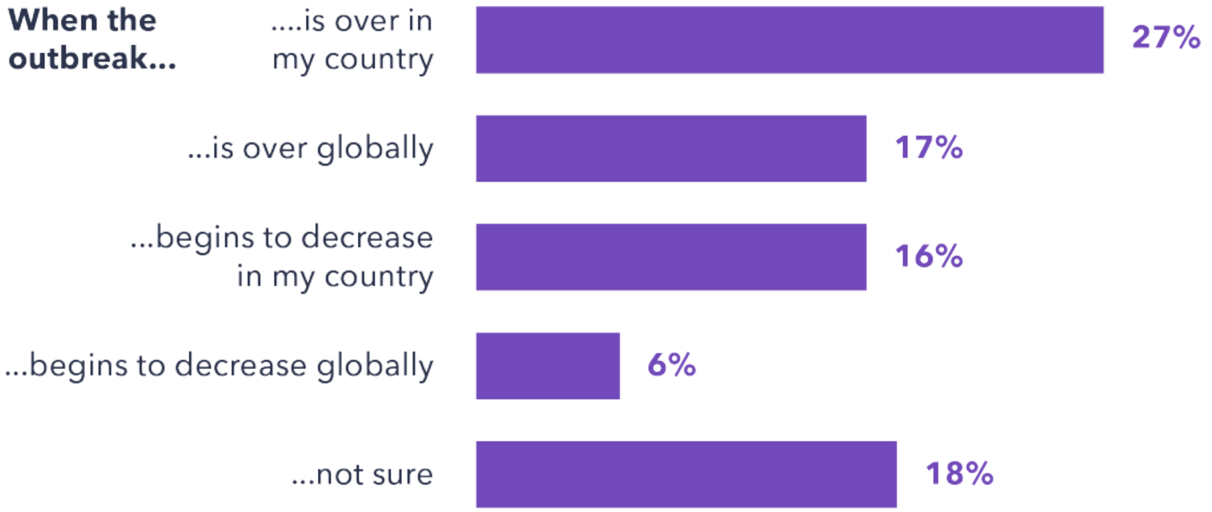
% who say they've **delayed purchasing vacations/trips** as a result of the coronavirus outbreak



Across most trended markets, delaying purchases of vacations is increasing, with the exception of the Philippines (where it's declined) and China (where's it stayed the same)

Over 2 in 5 are waiting until the outbreak ends/decreases in their country before purchasing

% who say the following is when they plan to buy purchases they have delayed



62% in Philippines say they will wait until the outbreak is ***over*** globally/nationally, followed by India, Italy, South Africa, and China

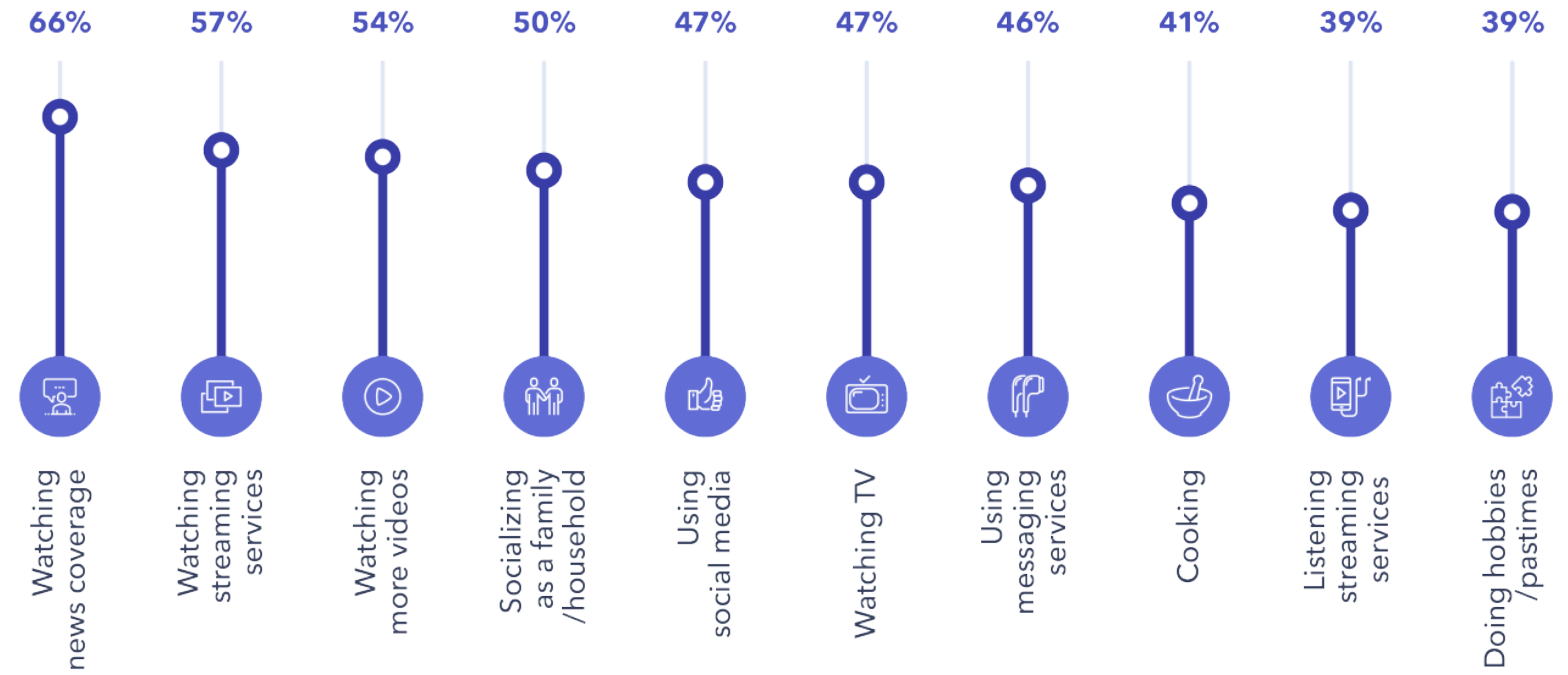
50% of **Gen Z** and 46% of **millennials** to resume purchasing when the outbreak ends/decreases in their country

Luxury items to be delayed the longest with 60% of luxury delayers saying they plan to purchase when the outbreak ends globally/nationally

Media and behavior shifts

Media changes since before the pandemic

% who say they **do more** of the following since the start of the outbreak



76%
use their smartphones more since the crisis

45%
use their laptops more

Media changes during the pandemic

% change in self-reported increases in engagement between wave 1 and wave 2

(March 16-20 / March 31-April 2)

+18%

Talking on the phone to others

+10%

Watching more shows /films on streaming services (e. g. Netflix)

+9%

Listening to more streaming services (e. g. Spotify, Apple Music, etc)

+4%

Listening to podcasts

+3%

Listening to more radio

Disengagement during the pandemic

-8%

Spending more time on hobbies/pastimes

-9%

Spending more time on apps

-10%

Creating/uploading videos (e. g. on YouTube, TikTok, etc)

-10%

Reading more magazines

-13%

Reading more newspapers

 | **Source:** GlobalWebIndex Coronavirus Study, March 16-20 & March 31-April 2
Base: 12,845 internet users aged 16-64 in 13 global markets and 15,079 internet users aged 16-64 in 17 global markets

Phoning and cooking are now core activities to pass time

% change in self-reported increases in engagement between wave 1 and wave 2

(March 16-20 / March 31-April 2)

Spending longer talking **on the telephone to others**

Australia	**+108%**
China	**+12%**
Japan	**+49%**
Philippines	**+12%**

Spending more time **cooking**

Brazil	**+54%**
France	**+69%**
Italy	**+6%**
South Africa	**+60%**

Listening to more **podcasts**

Germany	**+73%**
Spain	**+28%**

Spending longer on **social media**

UK	**+81%**

Spending more time on **apps**

U.S.	**+48%**

Listening to more **streaming services** (e. g. Spotify, Apple Music, etc)

Singapore	**+27%**

2020 GlobalWebIndex | Source: GlobalWebIndex Coronavirus Study, March 16-20 & March 31-April 2
Base: 12,845 internet users aged 16-64 in 13 global markets and 15,079 internet users aged 16-64 in 17 global markets

Content creation spike may be situational

% change in self-reported increases in engagement between wave 1 and wave 2

(March 16-20 / March 31-April 2)

Reading more **newspapers**

Australia	**-14%**
Brazil	**-22%**
Philippines	**-25%**
UK	**-29%**
U.S.	**-21%**

Creating/uploading videos (e.g. on YouTube, TikTok, etc)

Italy	**-27%**
South Africa	**-26%**
Spain	**-25%**

Spending longer on **messaging** services (e. g. WhatsApp, Facebook Messenger, etc)

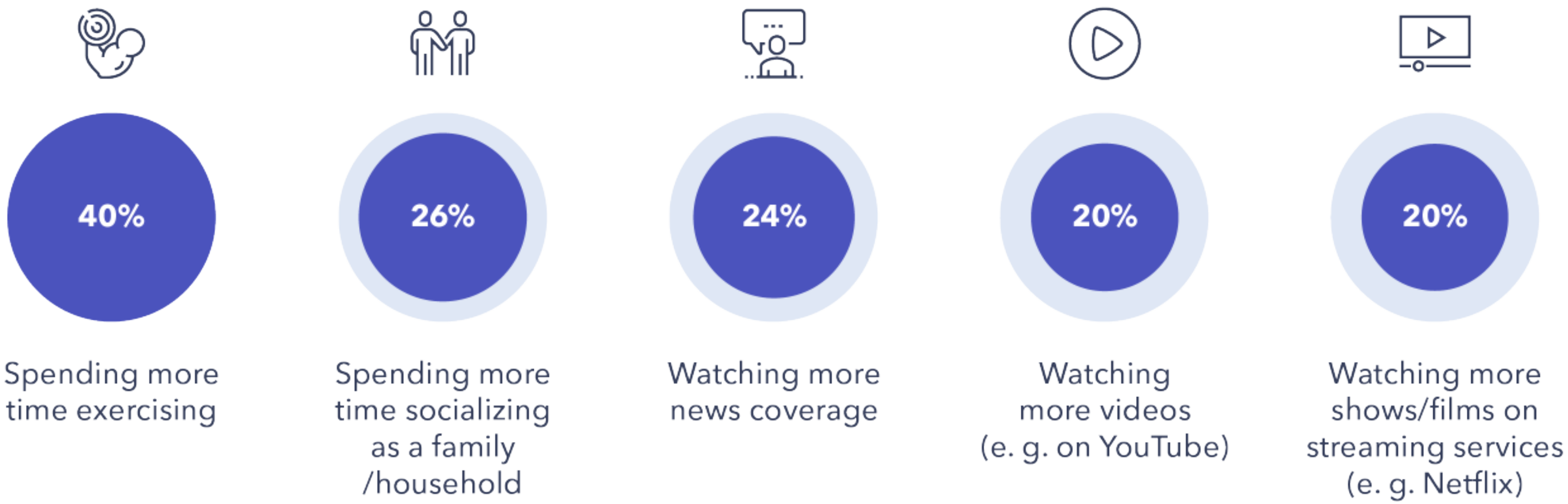
Japan	**-37%**

Spending more time on **apps**

China	**-20%**

Exercise spike predicted to outlast the pandemic

% who say they'll **carry on doing** the following when the outbreak is over



29%

of those who said they **never** exercised before the crisis say they intend to **continue exercising** after it.

That means the rate of those engaging in exercise in these countries **could theoretically grow by 15%** overall.

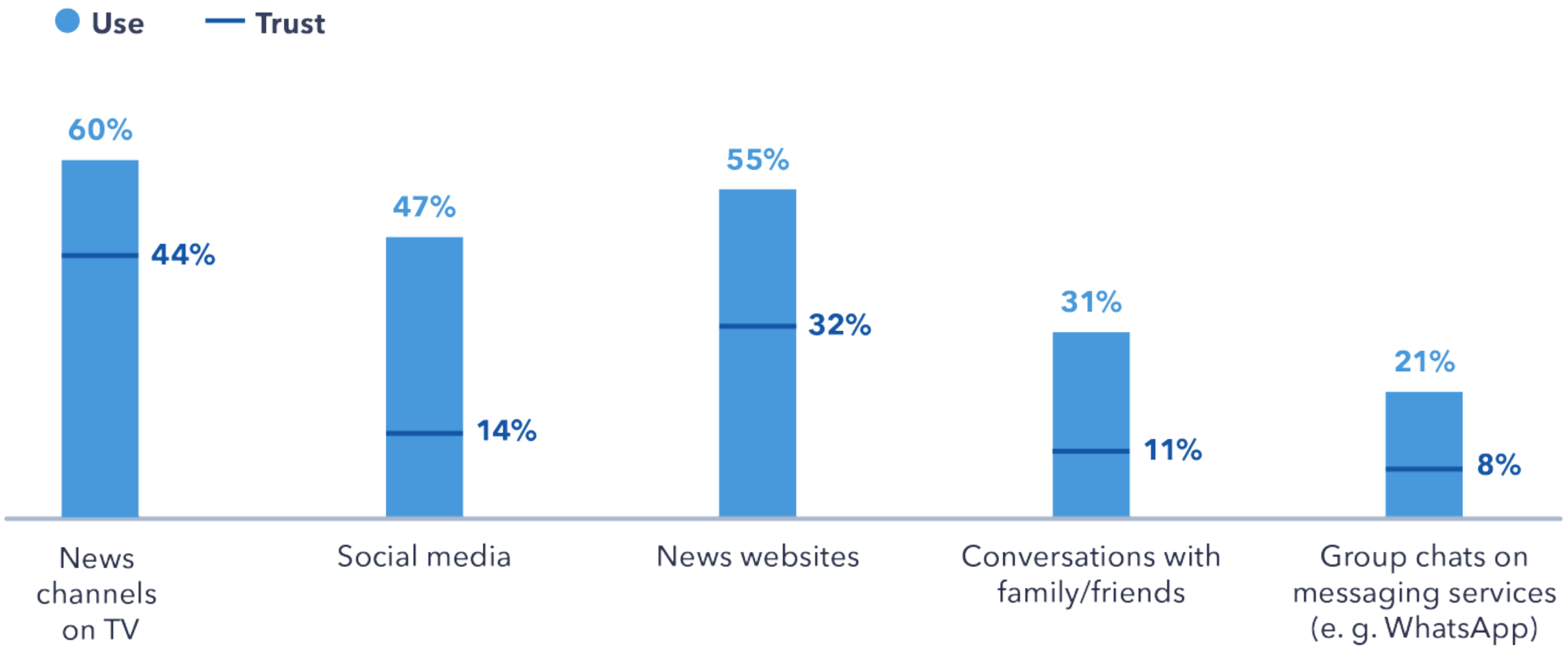
Are behavior surges due to new users or existing users?

	42%	30%	20%	8%	7%	6%
% of Non-Engagers* who now say they're doing more of the following	Watching streaming services	Cooking	Listening to streaming services	Listening to podcasts	Watching esports	Uploading videos
% increase in size of engager/userbase during the outbreak	+10%	+31%	+7%	+10%	+27%	+9%

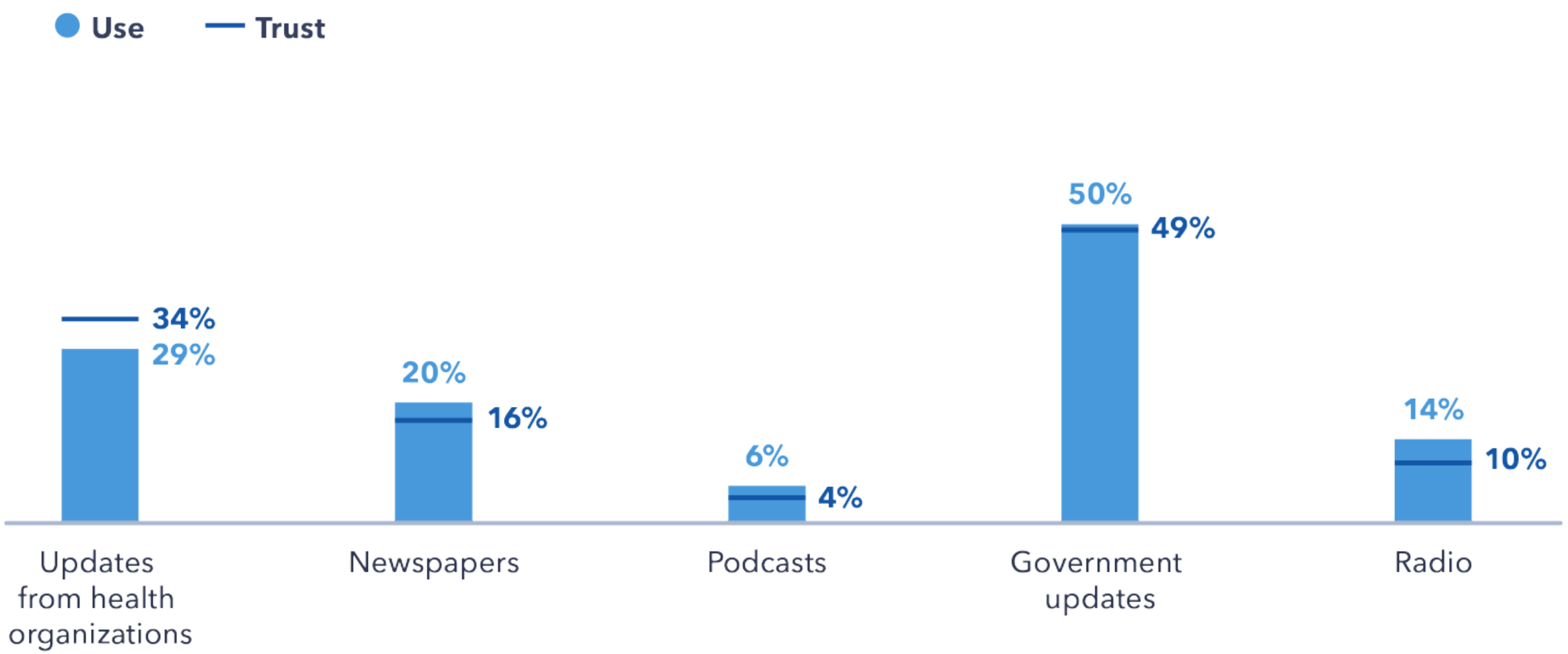
* Those who said they were not doing/interested in these activities before the outbreak

Trust in information & media

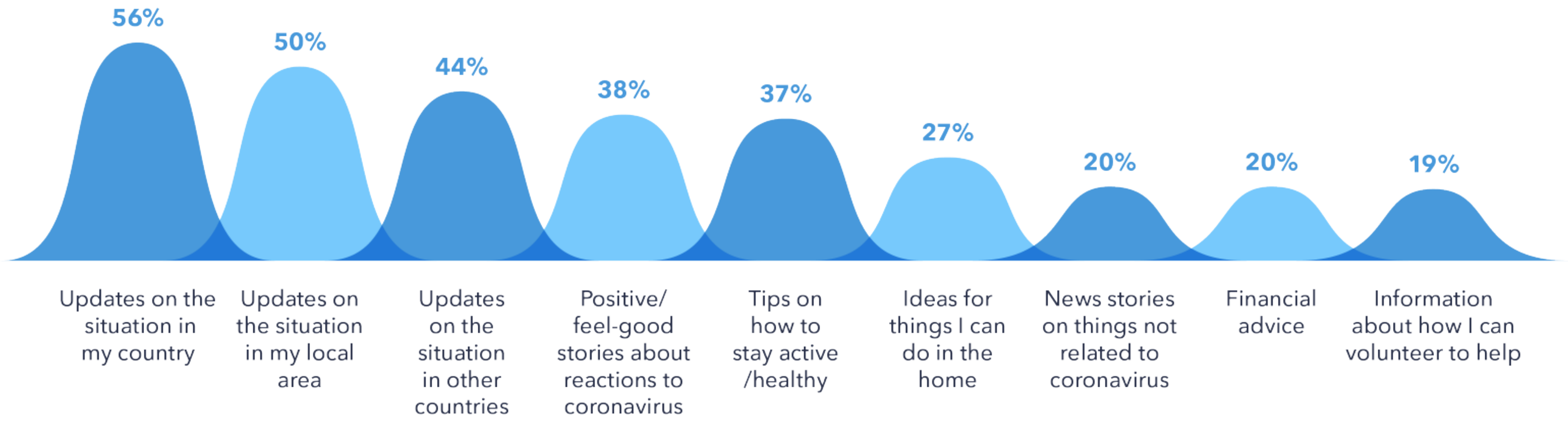
Trust in news information: largest deficits



Trust in news information: smallest deficits



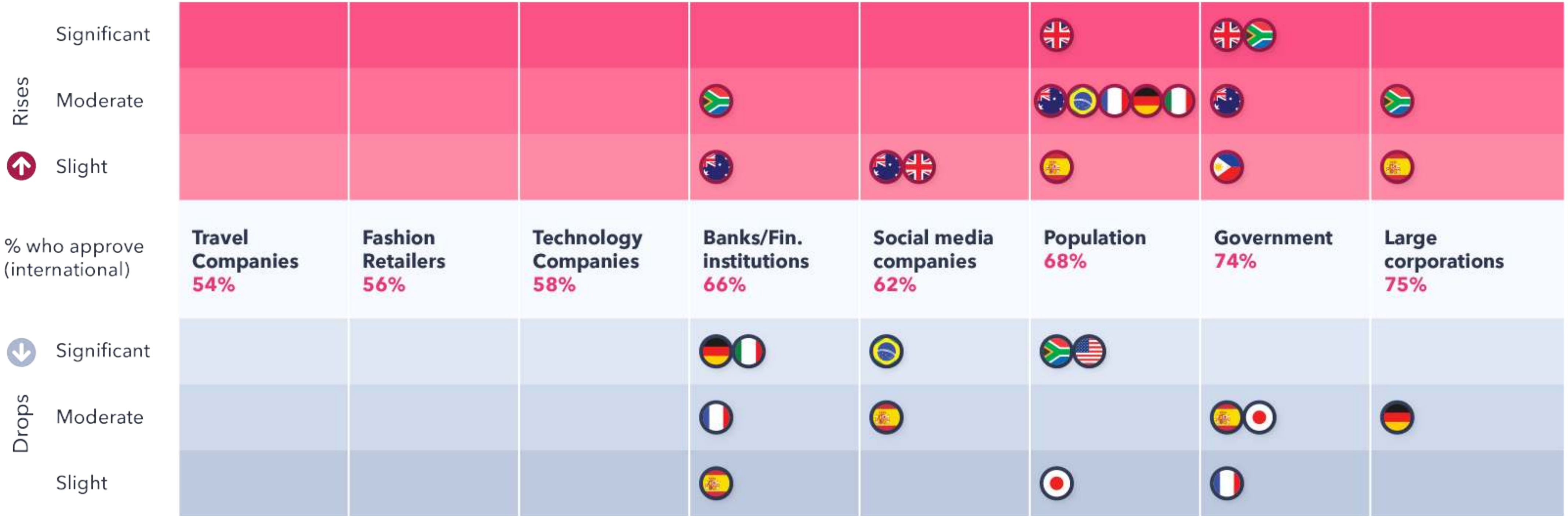
Demands for information impacted by outbreak stage



Brand roles in a pandemic

Approval of how organizations are handling the crisis is generally

% who NET approve how various organizations have handled the outbreak



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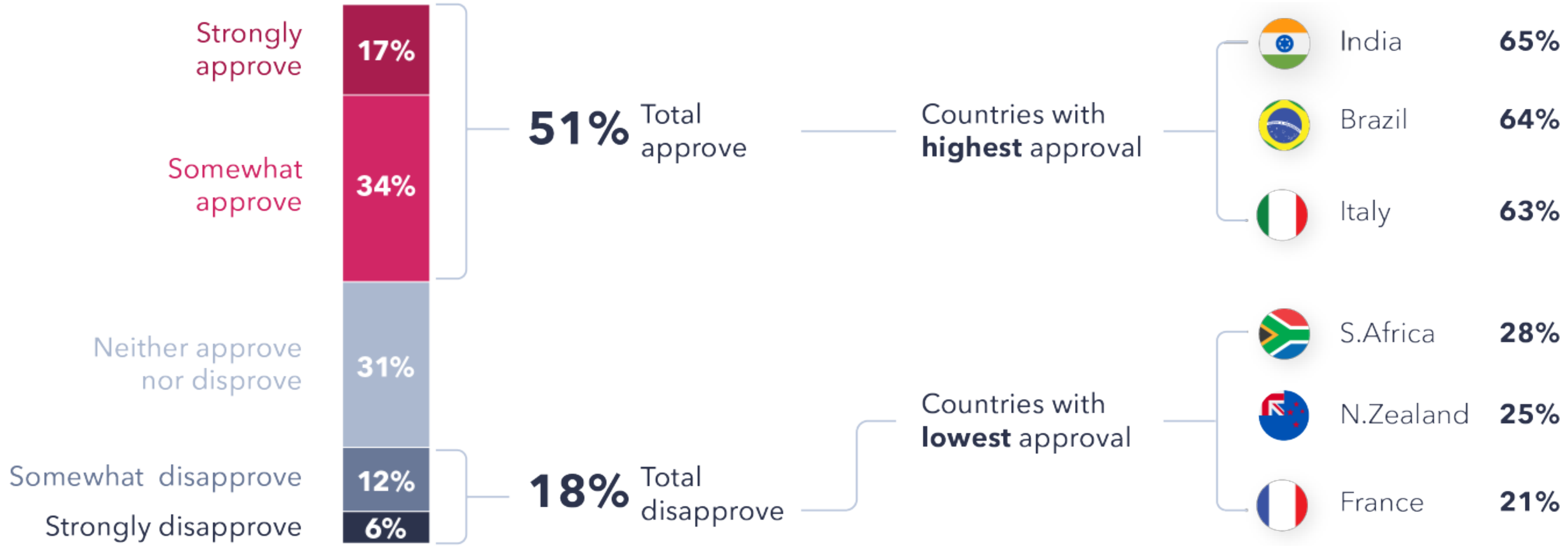
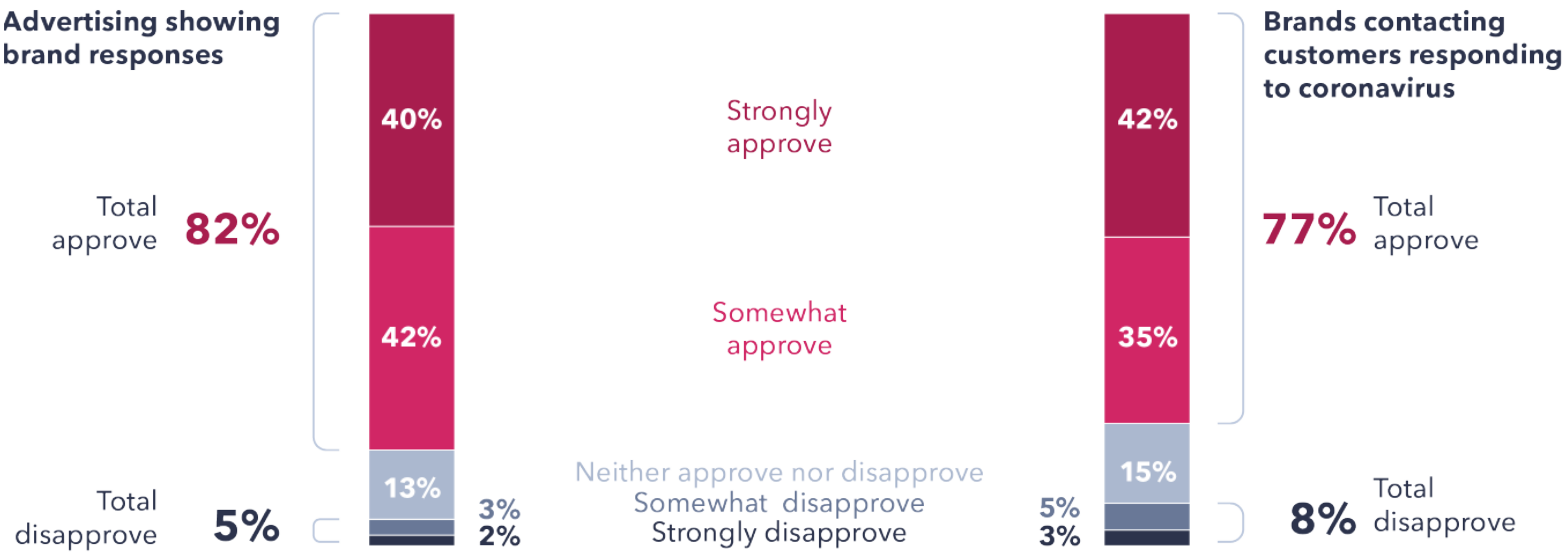
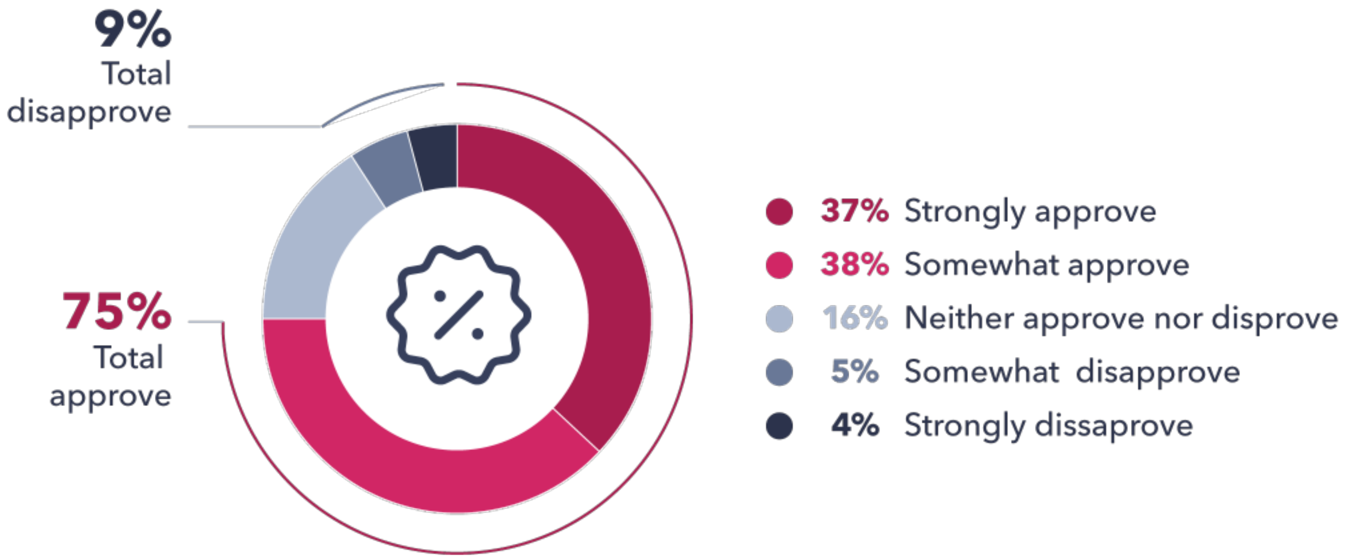
Support for running "normal" advertising campaigns



Information on brand responses to covid-19 goes a long way



Discounts are seen as a positive, rather than a cash-in



62%

of those against brands running "normal" ads want promotions/ offers/loyalty perks

Practical information is the most fundamental expectation of brands

Average agreement score for each statement on **what brands should be doing** during the crisis

Providing practical information/tips which help people to deal with the situation	1.4
Running "normal" advertising campaigns	1.1
Running advertising which show how they are responding to coronavirus or helping customers	1.1
Contacting customers (e. g. via email) to let them know how they are responding to coronavirus	1.1
Suspending their normal factory production to help produce essential supplies	1.1
Providing funny/light-hearted videos or content to entertain people	1.0
Running promotions/offers/loyalty perks for customers	1.0
Continuing to sell non-essential products via their websites	0.6

2 Strongly agree
1 Somewhat agree
0 Neutral

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What's next from GWI

Regular releases for UK & U.S.

Further waves of international recontact research are being considered

We will be opening this to client requests
Options to add questions in return for a contribution to costs