COVID-19: 1 year on

 |

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Who is GWI?

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

47
countries

550k+
interviews per year

22M+
panelists

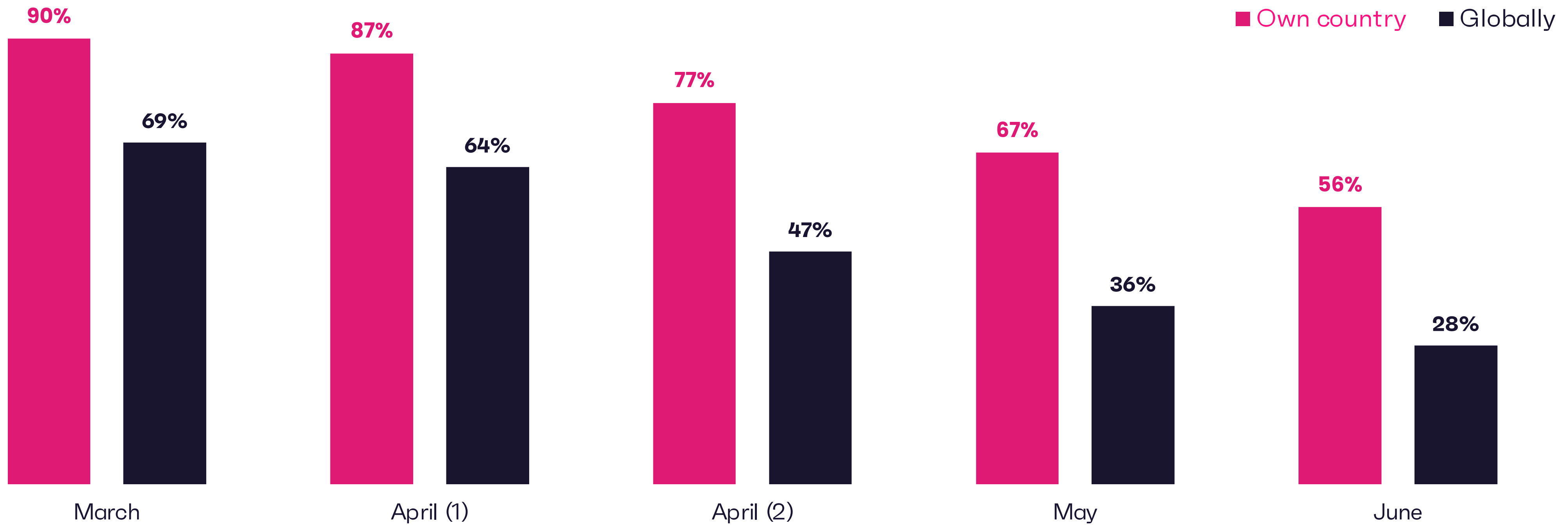
We delve into a broad range of topics

- Device usage
- Grocery items
- Finance, banking, and insurance
- Personal care products
- Attitudes and interests
- Meal behaviors
- Health conditions
- Demographics
- TV and movies
- Data and privacy
- Charitable giving and sustainability
- Restaurants and OSRs
- Alcohol
- Social media
- Auto and transport
- News, magazines and content
- Smoking, vaping, CBD and canabis
- Fashion
- Gaming
- Lifestyle
- Brand relationships
- Major purchases
- Home and property
- Shopping behaviors
- Healthcare
- Beverages
- Music and audio
- Retail behaviors and influencers
- Work and professional life
- Food, cooking, & dietary preferences

COVID-19 in context

Coming to terms with reality

% who thought the outbreak would last “6 months or less” in their own country vs. globally, in 2020:



How “sticky” have behaviors been?

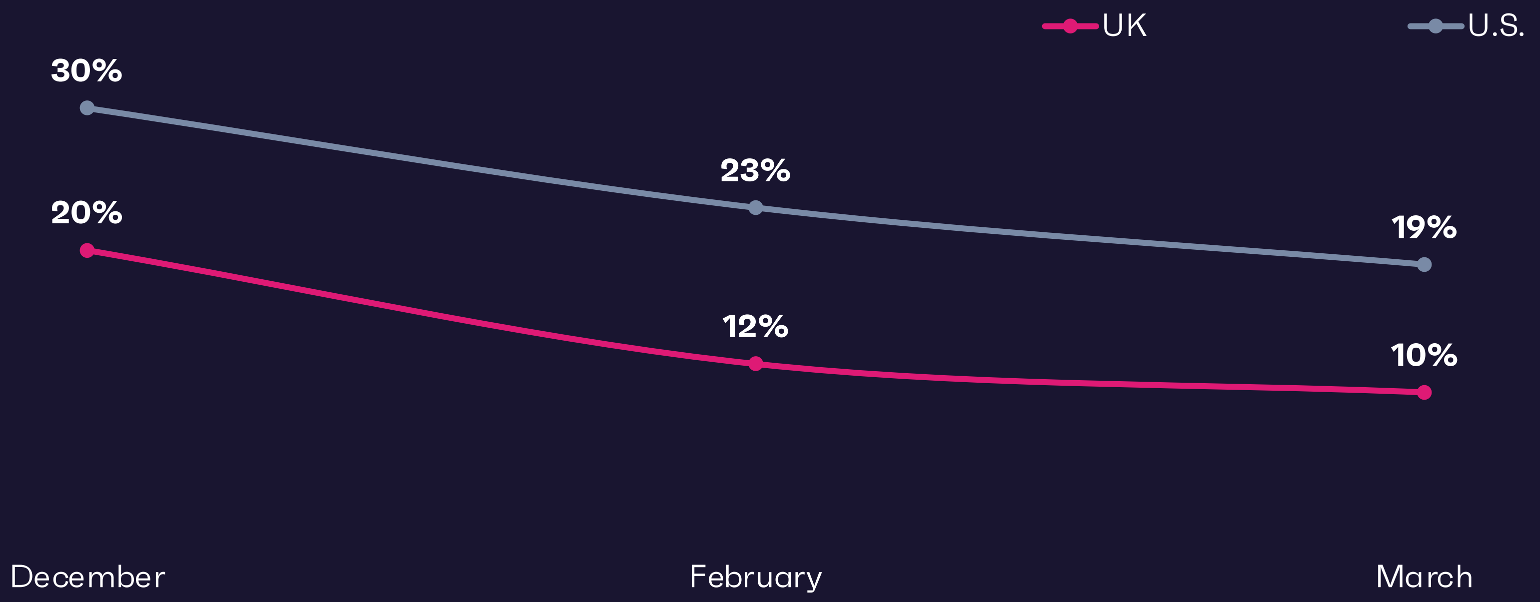
% who started doing more of these activities at the beginning of the pandemic, who are still doing more of them

Top adopted activities

Shopping online	46%
Cooking	34%
Video gaming	27%

Hope on the horizon: vaccine hesitancy down

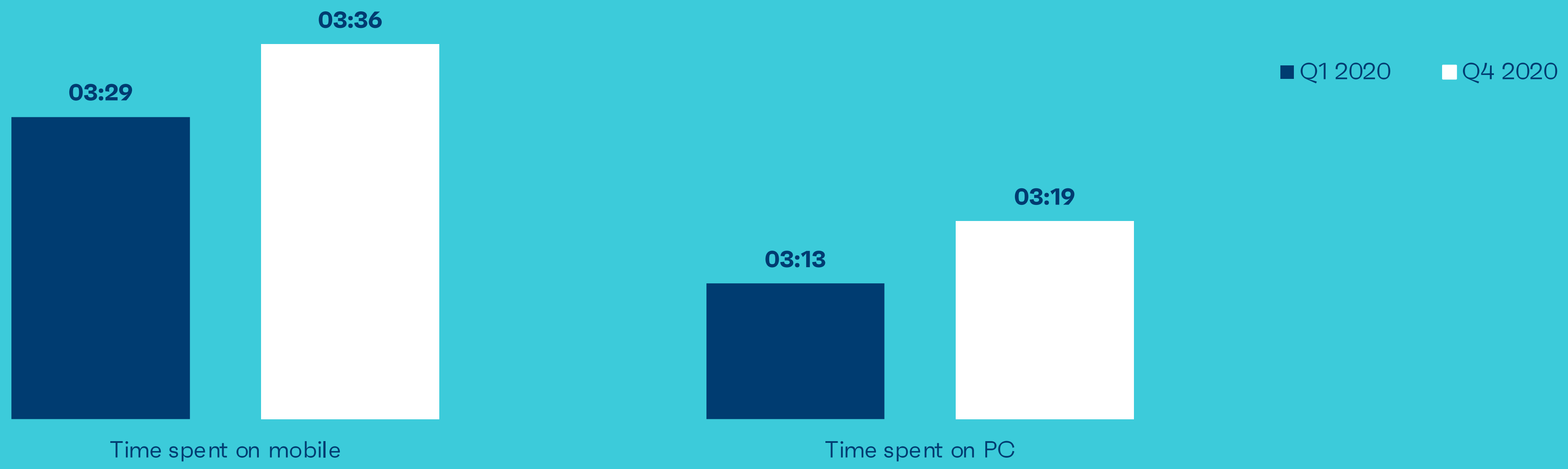
% of U.S. and UK consumers who were unsure or unwilling to get a COVID-19 vaccine:



Our changing relationship with technology

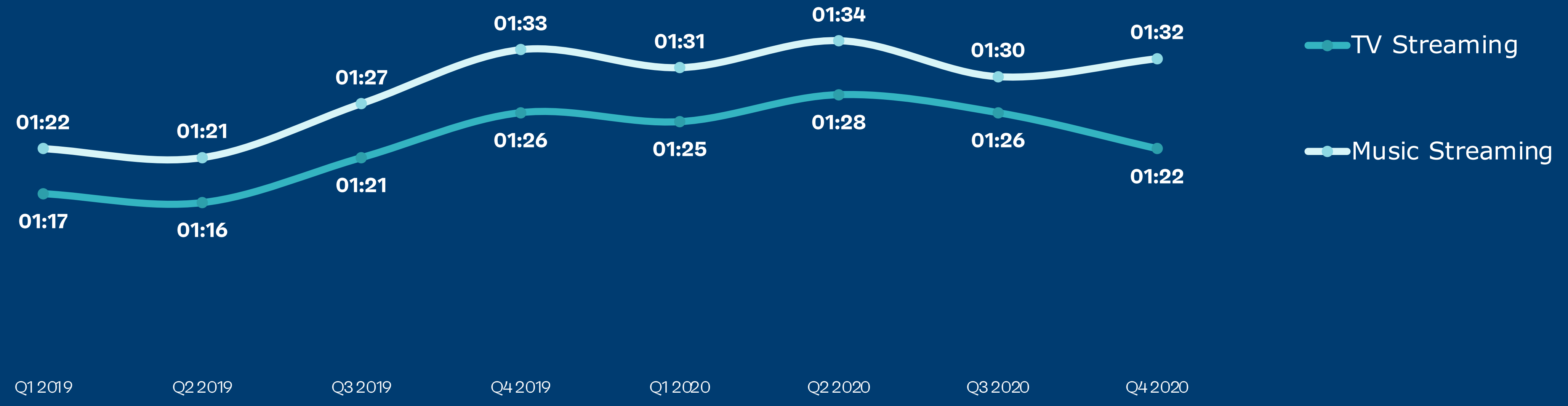
In lockdown, increased time spent on devices – notably mobile

Average time spent on devices globally:



Growth of streaming services starting to plateau

Average time spent on streaming services globally:



Older consumers' adoption of technology has been accelerated

% of Gen X/boomers who:

Agree: "I trust new technology to improve my health" ***(Global)***

Q 2 2020	29%
Q 3 2020	30%
Q4 2020	31%

Have paid for a movie/TV streaming service ***(Global)***

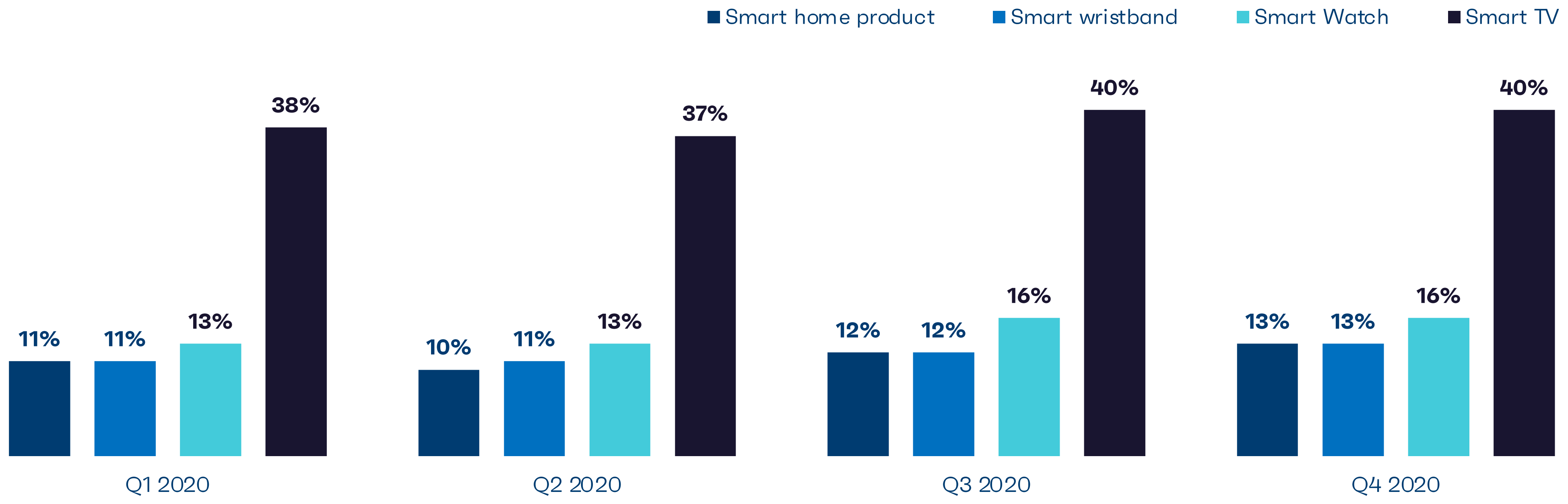
Q 1 2020	27%
Q 2 2020	28%
Q 3 2020	30%
Q4 2020	30%

Are sticking to new tech habits ***(U.S./UK)***

Playing video games	69%
Shopping online	76%
Creating / uploading videos	66%
Using online learning platforms	58%

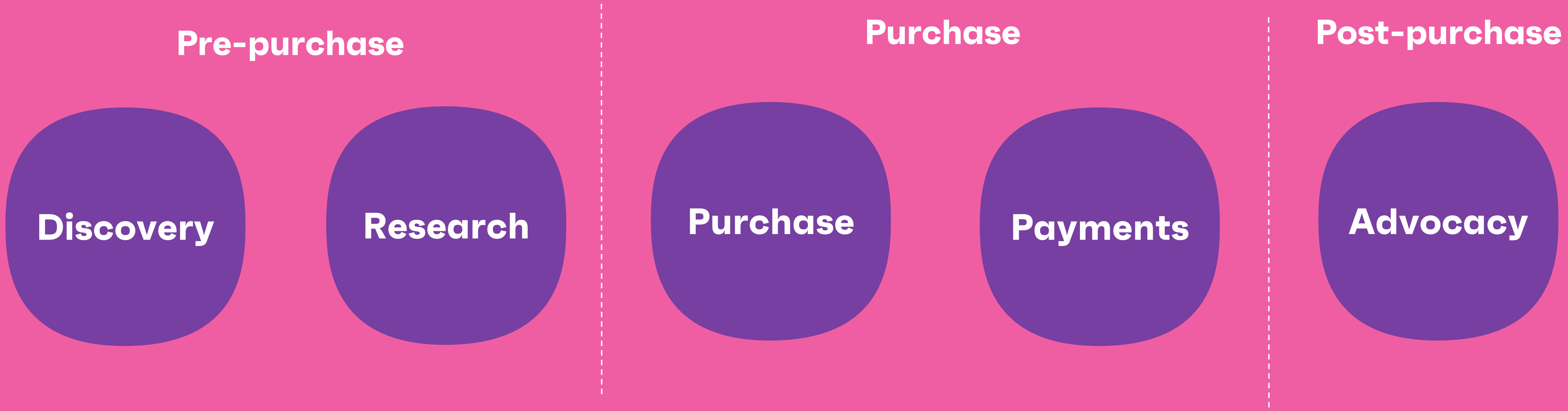
Embracing IoT as smart device ownership rises

% who own various smart devices



The consolidation of (e)commerce

eCommerce sites becoming more integral in the purchase journey



Pre-purchase:

eCommerce sites function as channels of brand discovery and research

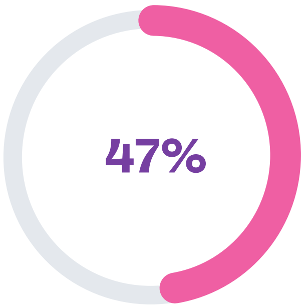
% who use the following channels to discover or research brands/products:

Purchase:

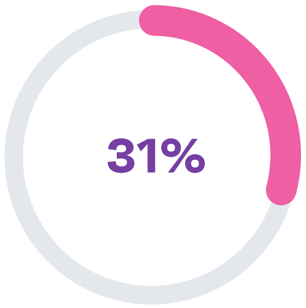
Greater reliance on online marketplaces and their supporting infrastructure

% of U.S./UK consumers who agree with the following statements:

For larger purchases:

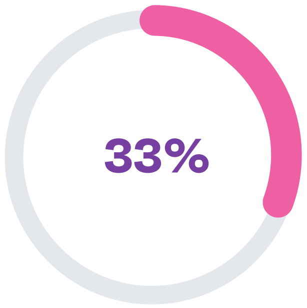


"I buy more items online"

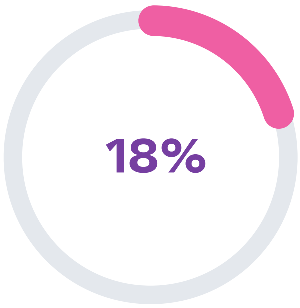


"I rely more on ecommerce marketplaces (i.e. Amazon)"

For smaller purchases:



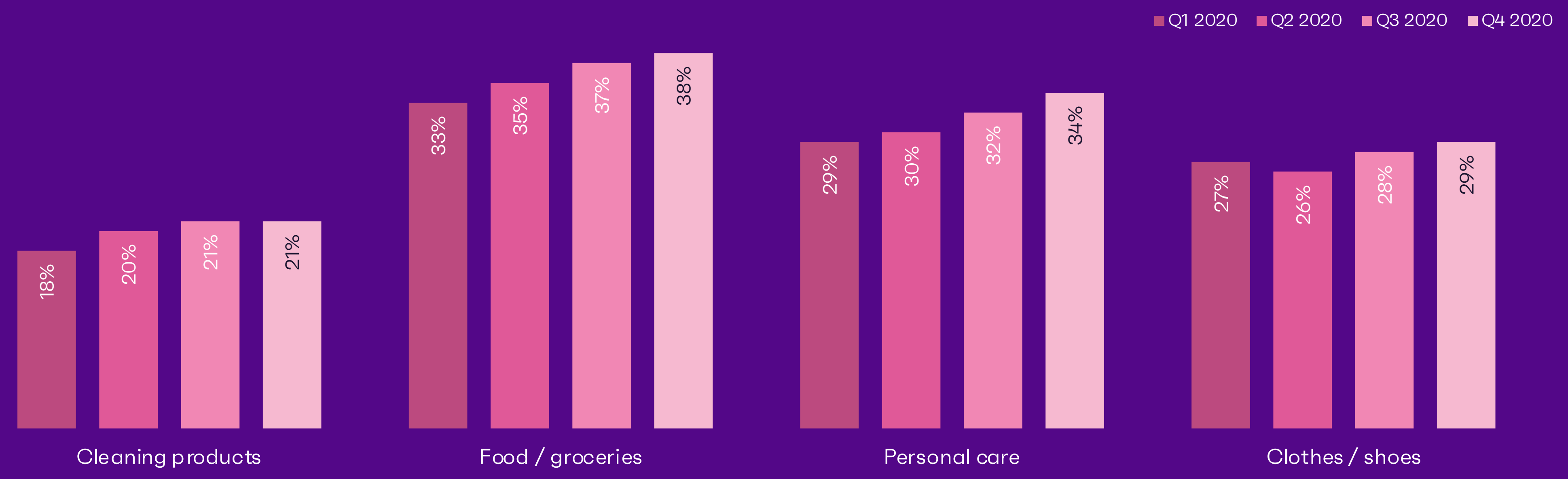
"I buy more items online"



"I rely more on ecommerce marketplaces (i.e. Amazon)"

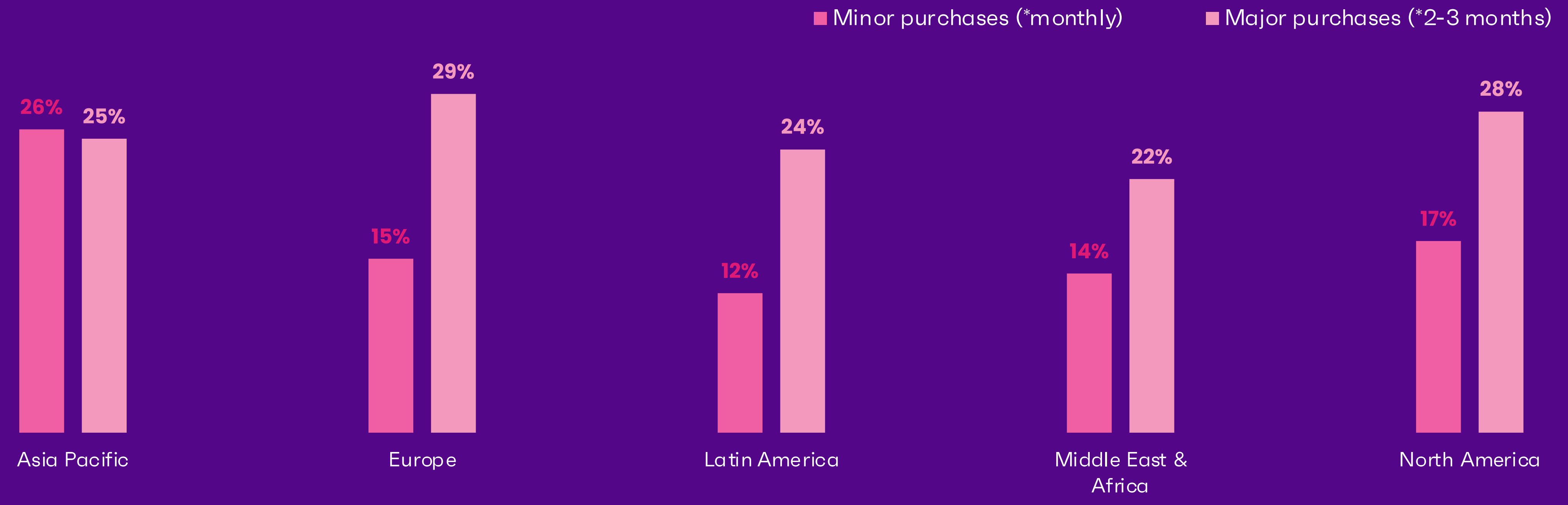
Online purchasing of everyday goods has grown

% who have purchased the following types of products online in the past month:



Online purchases: major goods vs. minor goods

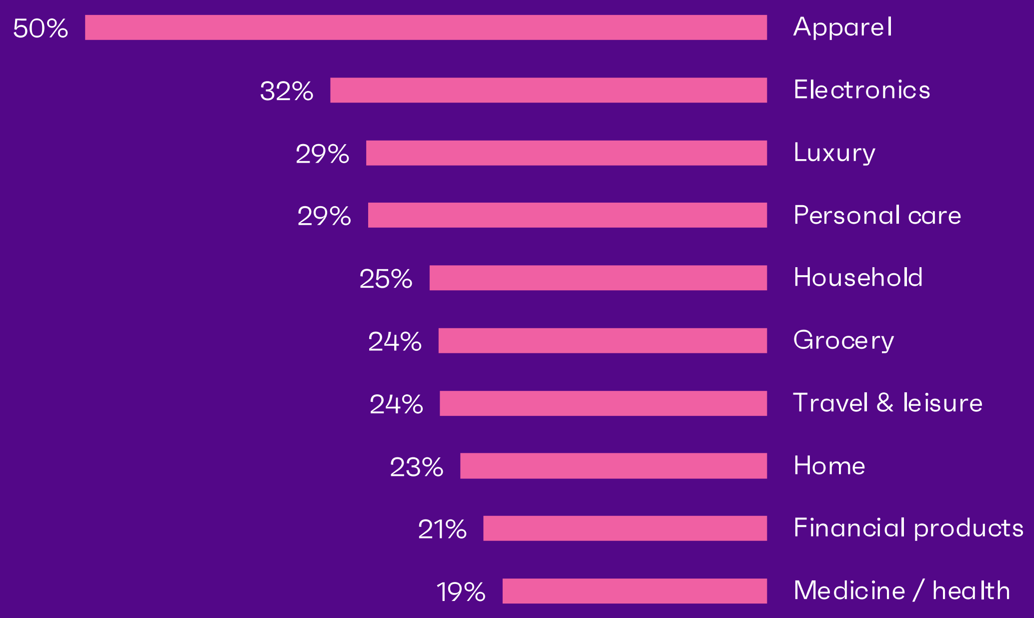
% of item purchases which were made online *:



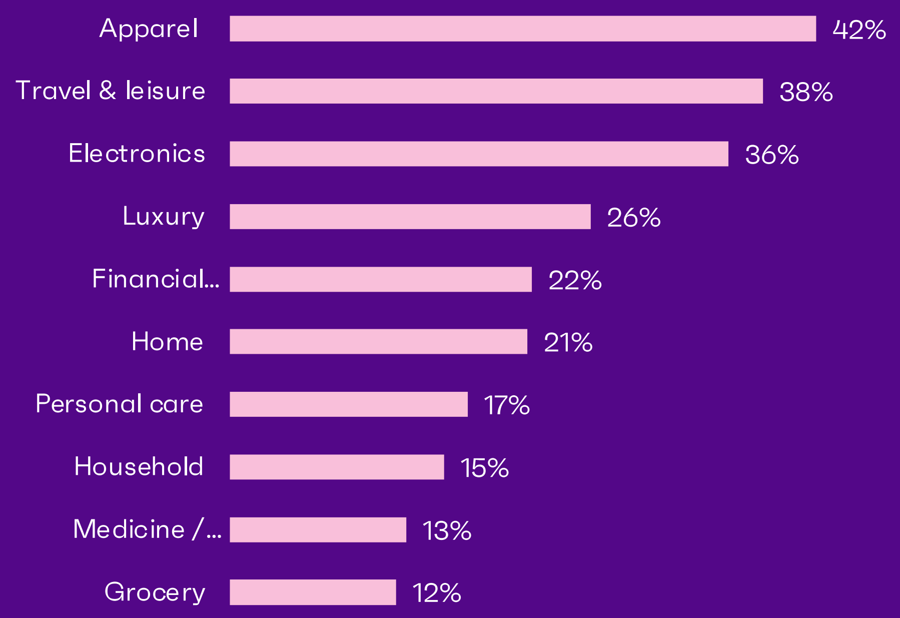
Online purchases by category

Share of monthly item purchases made online by category:

Asia Pacific

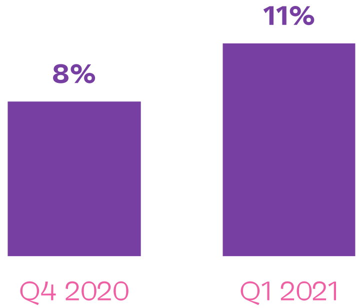


North America

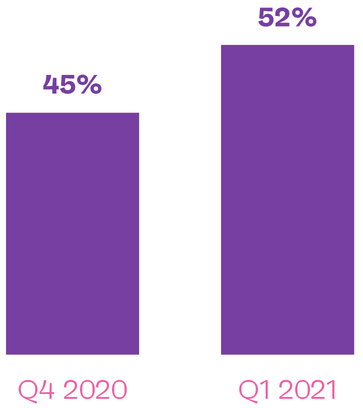


Increase in ecommerce offerings for small, everyday shopping

% who shop at Whole Foods online (U.S.):



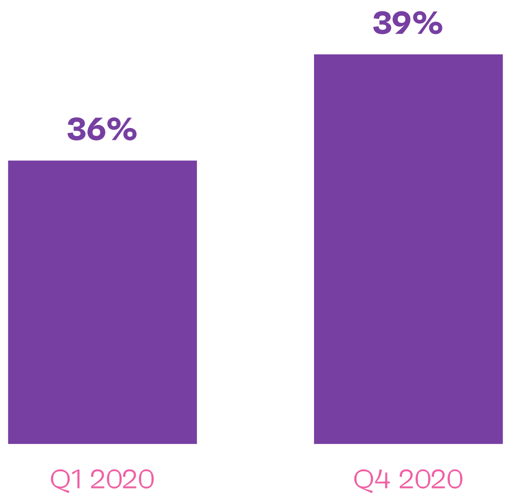
% who shop at Wal-Mart online (U.S.):

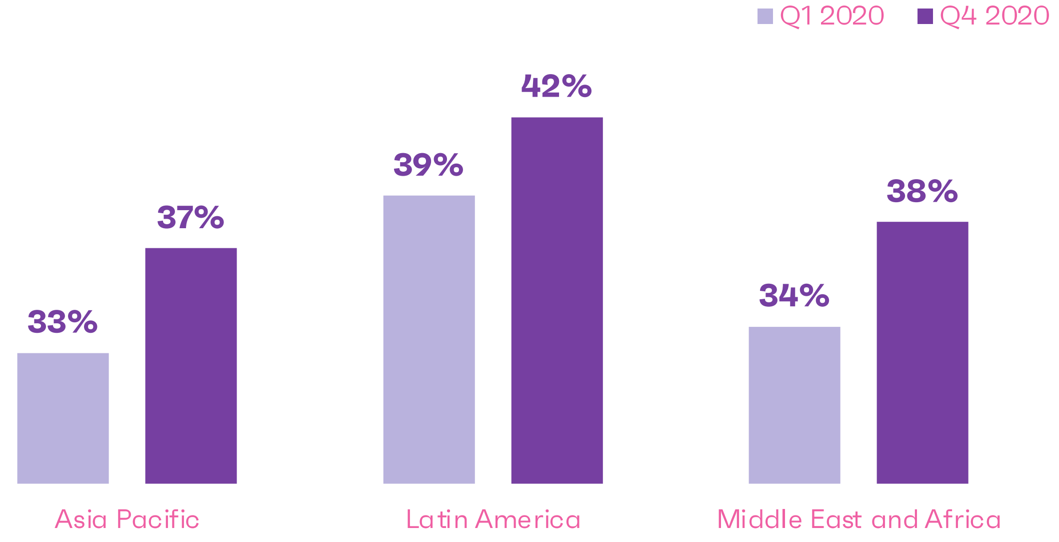


Post-purchase:

Customer reviews as the new ‘word of mouth’ in a virtual world

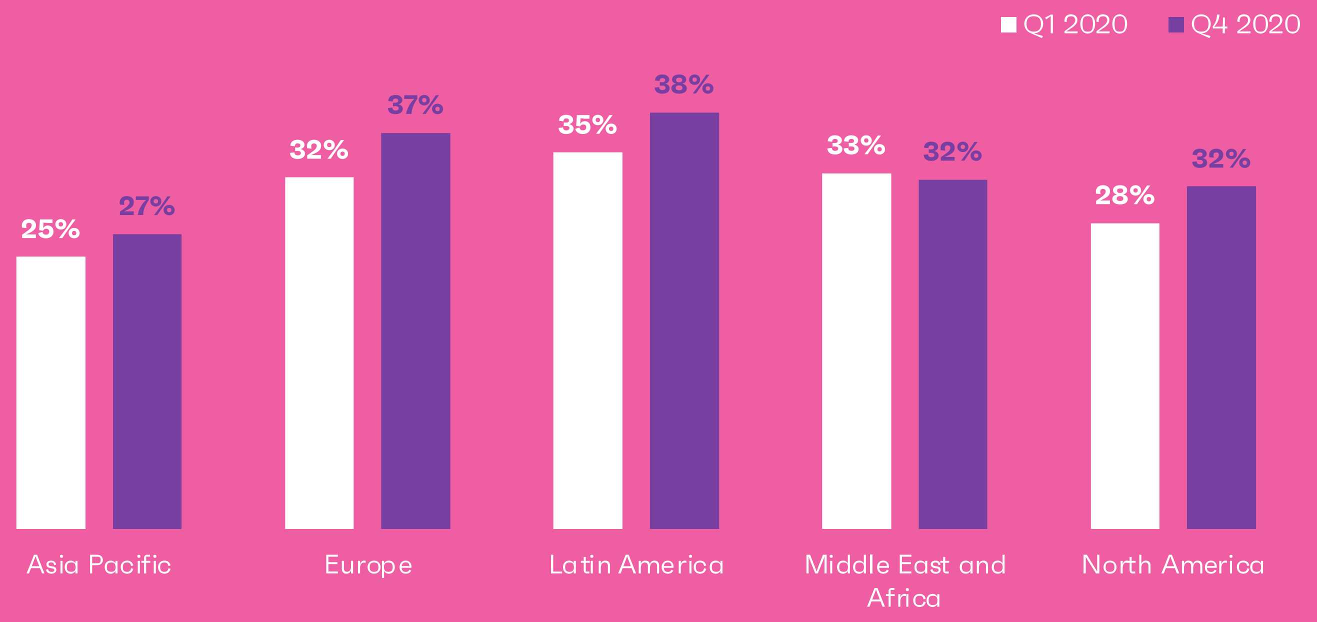
% using consumer reviews for research:





What does differentiation look like?

% of global consumers who say they want brands to support local suppliers:

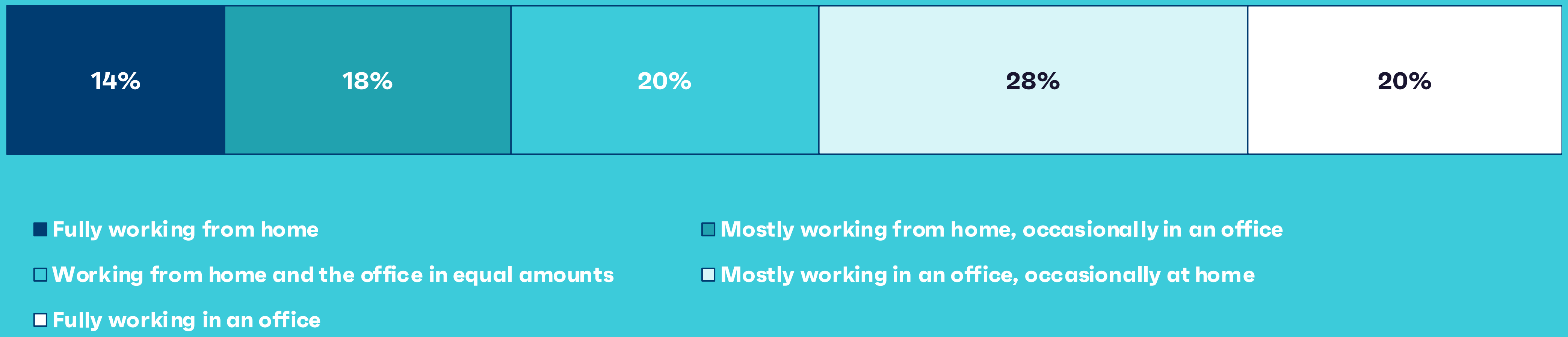


- Aligning and reflecting values
- Focus locally if possible
- Provide a human connection

The work/home hybrid

The office will see an inevitable return based on employees need

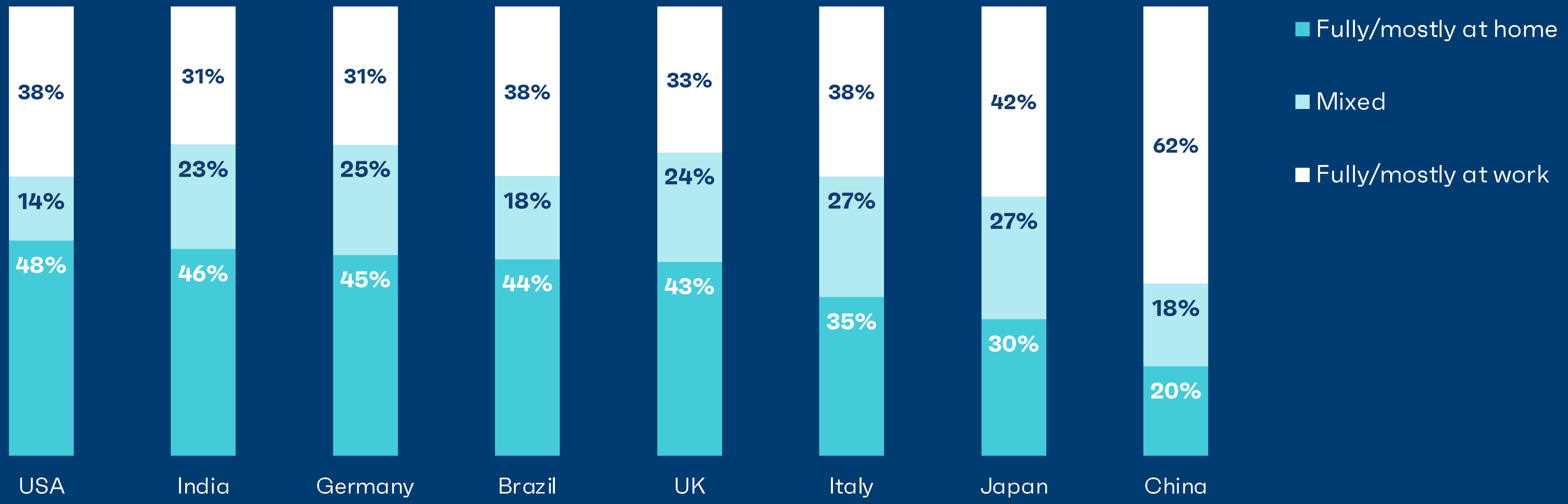
% who would prefer the following work set-up after the pandemic:



US, UK, Brazil, China, Germany, India, Japan, Italy

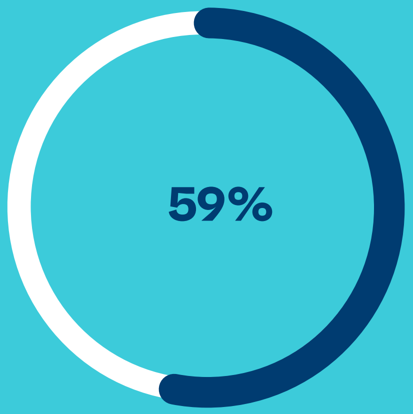
WFH balance differs by country

% who would prefer the following work set-up after the pandemic:



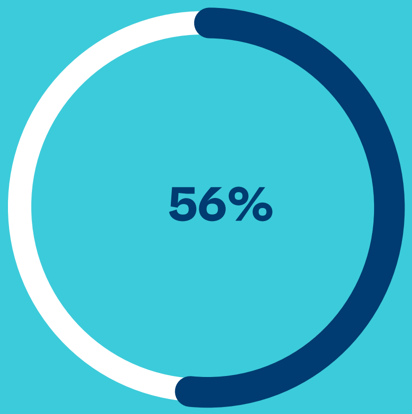
The productivity paradox of WFH

#1 benefit



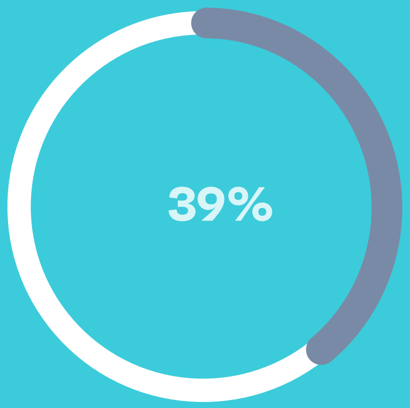
More time with family

#2 benefit



Saving time (i.e. no commute)

#1 challenge

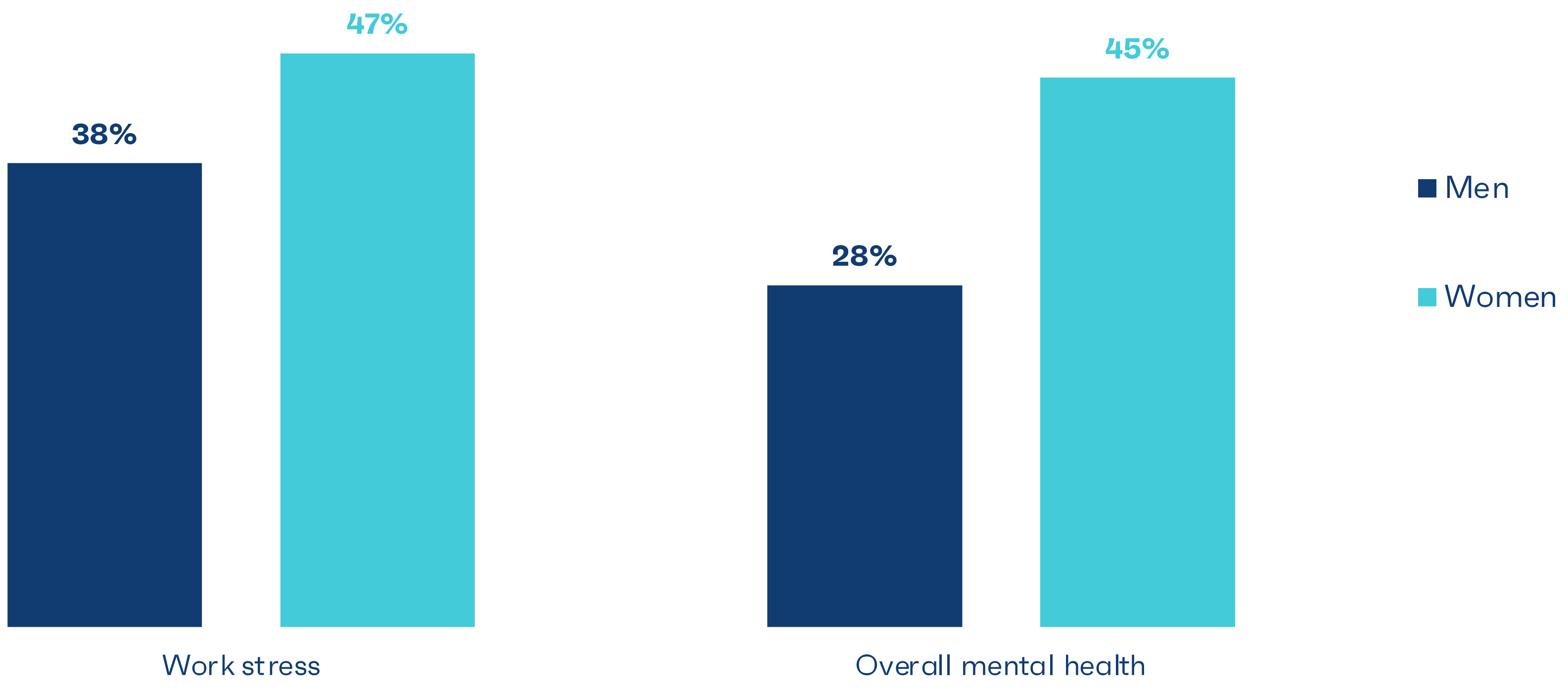


Feeling less productive

US, UK, Brazil, China, Germany, India, Japan, Italy

Unequal impacts and opportunities:

% of men vs. women who say that the following things have gotten worse for them during the pandemic (U.S.):



What resources, infrastructure, and media emerge around these groups?

All / mostly home

- Younger and more open-minded
- Community-focused and supportive of local businesses
- Advertising averse and concerned about social media's impact

Mixed

- Younger and more inclined to stand out in a crowd
- Focused on arts, culture, and experiences
- Place a strong value in both community and technology

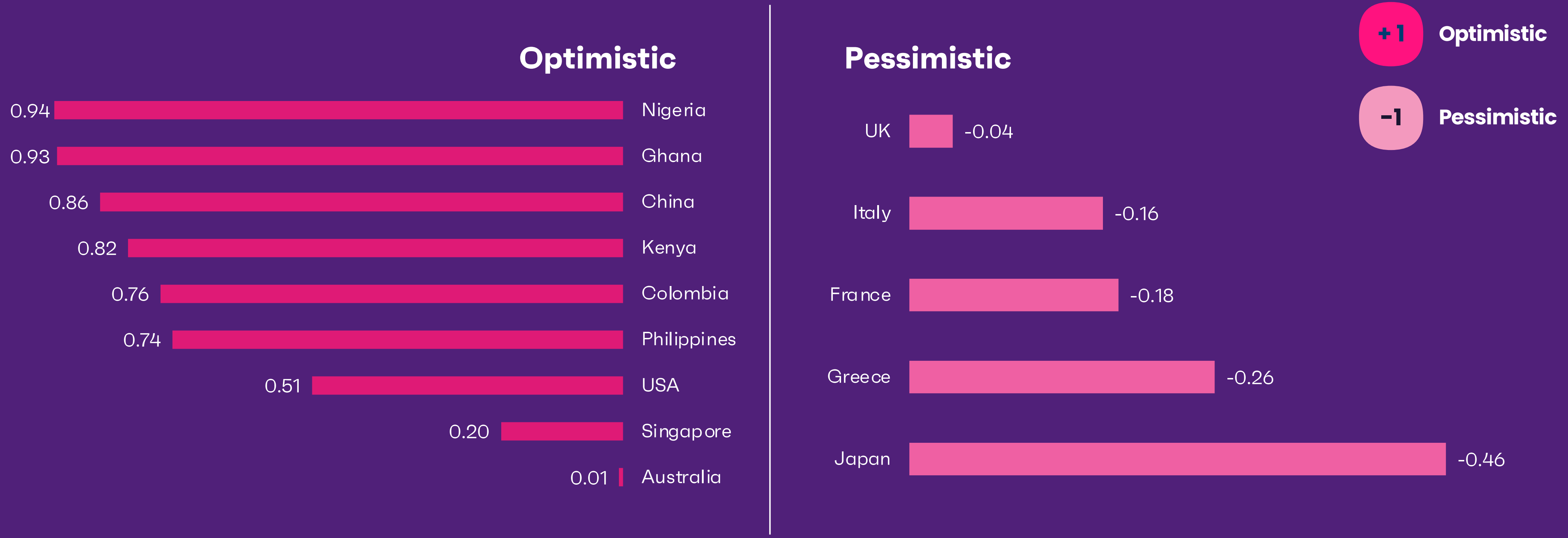
All / mostly office

- Older, more likely to be educated, and risk-averse
- Self-described affluence, and cosmopolitan behaviors
- More traditionally-minded yet open to advertising and social media's influence

A spending boom?

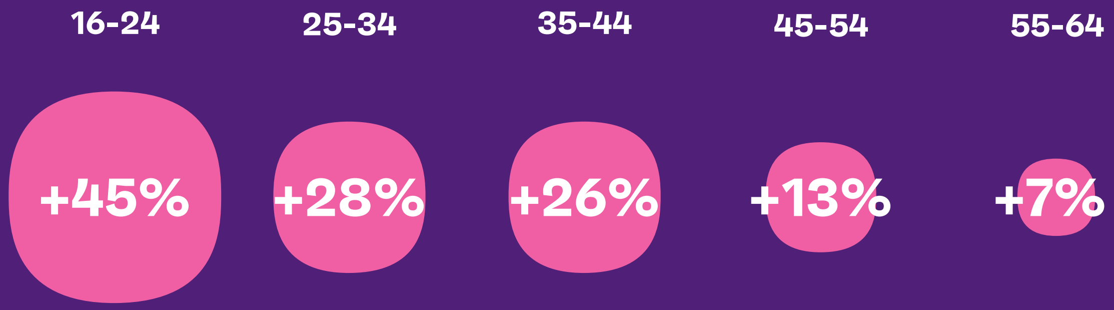
Economic confidence: Personal finances

Average score, with +1 being optimistic and -1 being pessimistic

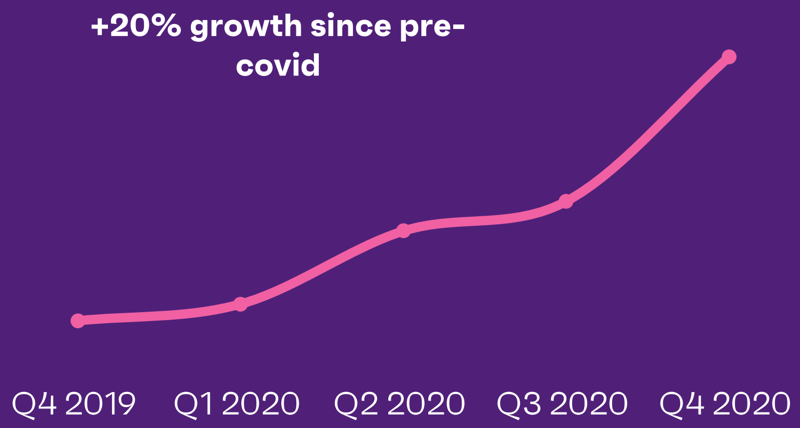


American savings and investments have grown

% growth in average value of U.S. consumers' savings / investments

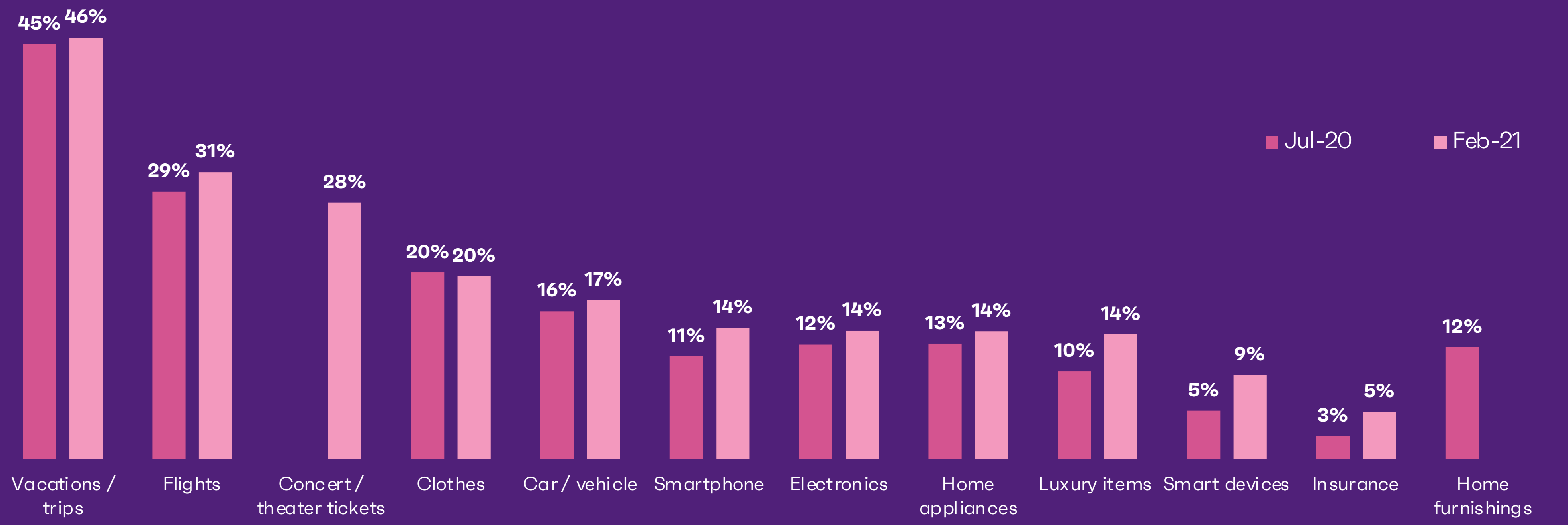


Growth over time:
All U.S. consumers with investments



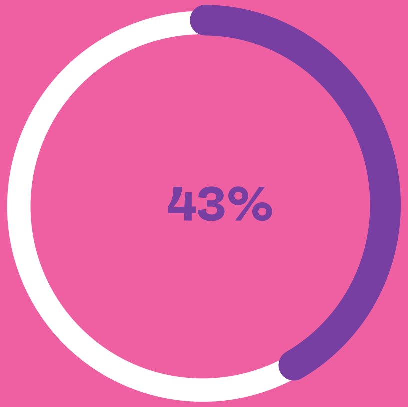
Purchase delays

% who delayed purchasing the following as a result of the coronavirus outbreak

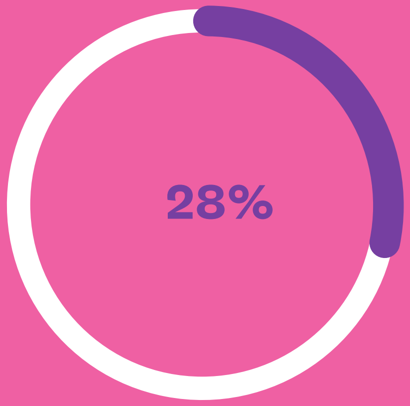


Post-restriction plans

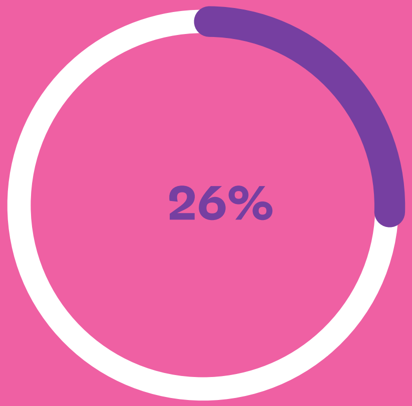
% who are most looking forward to the following once restrictions ease



Eat out at a restaurant



Visit the cinema



Attend music concerts

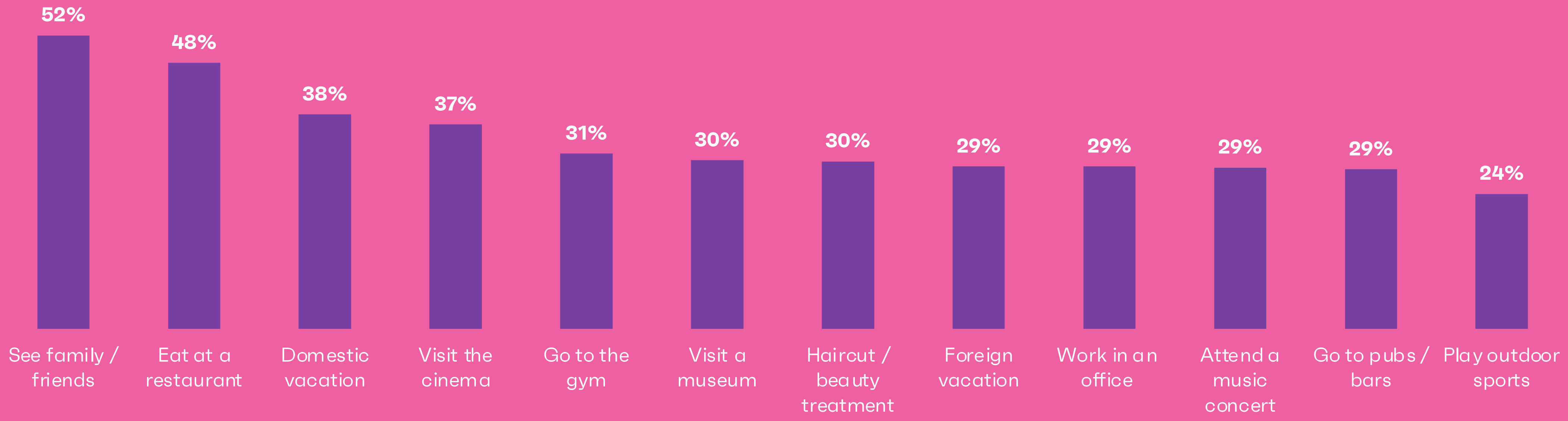
US, UK, Brazil, China, Germany, India, Japan, Italy

Opening up the economy: comfort levels

Indoor dining	Instore shopping	Large indoor events	Large outdoor events
Comfortable: China	**Comfortable:** China, India, UK, USA	**Comfortable:** China	**Comfortable:** China
Uncomfortable: Brazil, Germany, Italy, India, Japan, UK, USA	**Uncomfortable:** Brazil, Germany, Italy, Japan	**Uncomfortable:** Brazil, Germany, Italy, India, Japan, UK, USA	**Uncomfortable:** Brazil, Germany, Italy, India, Japan, UK, USA

Vaccines will break down comfort barriers

% who say that being vaccinated would make them feel more comfortable to do the following:



Key insights

Key insights

- COVID-19 has **accelerated tech engagement**, increased reliance on mobile, and sped up adoption by older users. Early upticks in streaming, however, have started to plateau – indicating we are at **saturation**.

- **eCommerce consolidation continues** as consumers move online for minor, everyday purchases + the ever-growing importance of online retailers and marketplaces across all touchpoints - both pre- and post-purchase.

- A work/home **hybrid model is inevitable** as issues around productivity and stress/anxiety rise in ways that are unequal across groups; understanding the unique worker profile that emerges will be key to **creating the right infrastructure around suburbs and city centers**.

- Spending booms will happen in pockets across different areas varying on a safe recovery model – **China and the U.S.** are most likely to see this first. Spending will be concentrated on travel + food experiences.

Thank you

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