Understanding the 2020 consumer

Wave 8 Global Barometer Study

toluna harris interactive KURUNDATA

2020 has been a year of change.

Today's consumer is making new decisions - about their health, their families, their finances, the products they buy and more.

Understanding this consumer is critical. We field our 2020 Consumer Barometer twice monthly to better understand consumer changes as they happen.

Wave 8: Markets studied and field schedule

Below is the field schedule and number of completed interviews by market included in this wave of research. Data has been weighted by age, gender and region to be Census representative in all markets (except UAE and the Philippines where regions are not weighted, and India where we're Internet representative). In France, data is also weighted to reflect social grade.

Market	Completed Interviews	Fieldwork Dates
UK	1,099	16th – 21st July
France	1,117	16th – 21st July
Germany	1,098	16th – 21st July
Italy	1,121	16th – 21st July
Spain	1,120	16th – 21st July

Market	Completed Interviews	Fieldwork Dates
Australia	1,091	16th – 21st July
Singapore	546	16th – 21st July
Malaysia	519	16th – 21st July
Indonesia	535	16th – 21st July
Philippines	526	16th – 21st July
Thailand	549	16th – 21st July
Japan	1,110	16th – 21st July
Korea	1,095	16th – 21st July
China	1,084	16th – 21st July
Hong Kong	540	16th – 21st July
India	1,073	16th – 21st July
UAE	546	16th – 21st July

Market	Completed Interviews	Fieldwork Dates
US	1,082	16th – 21st July
Brazil	1,155	16th – 21st July

Consumer behavior continues to change

- Globally, consumers are expecting to spend more money than previous years on household cleaning, personal care and hygiene products and healthcare.

- People are looking for new ways to entertain themselves. Globally, 27% of people say they want to try new forms of entertainment and subscriptions.

- In addition, many plan to invest more money in home improvements this year, 82% of respondents plan to spend the same or more this year as compared to prior years.

- 24% of people report spending less on school supplies and back to school shopping than prior years.

Here's what marketers need to keep in mind

- Restaurants, and retailers have gotten their messages right. Consumers perceive their communications to be positive and informative. Gyms, beauty salons and entertainment venues need to do more to provide reassurance around safety measures in place as restrictions ease.

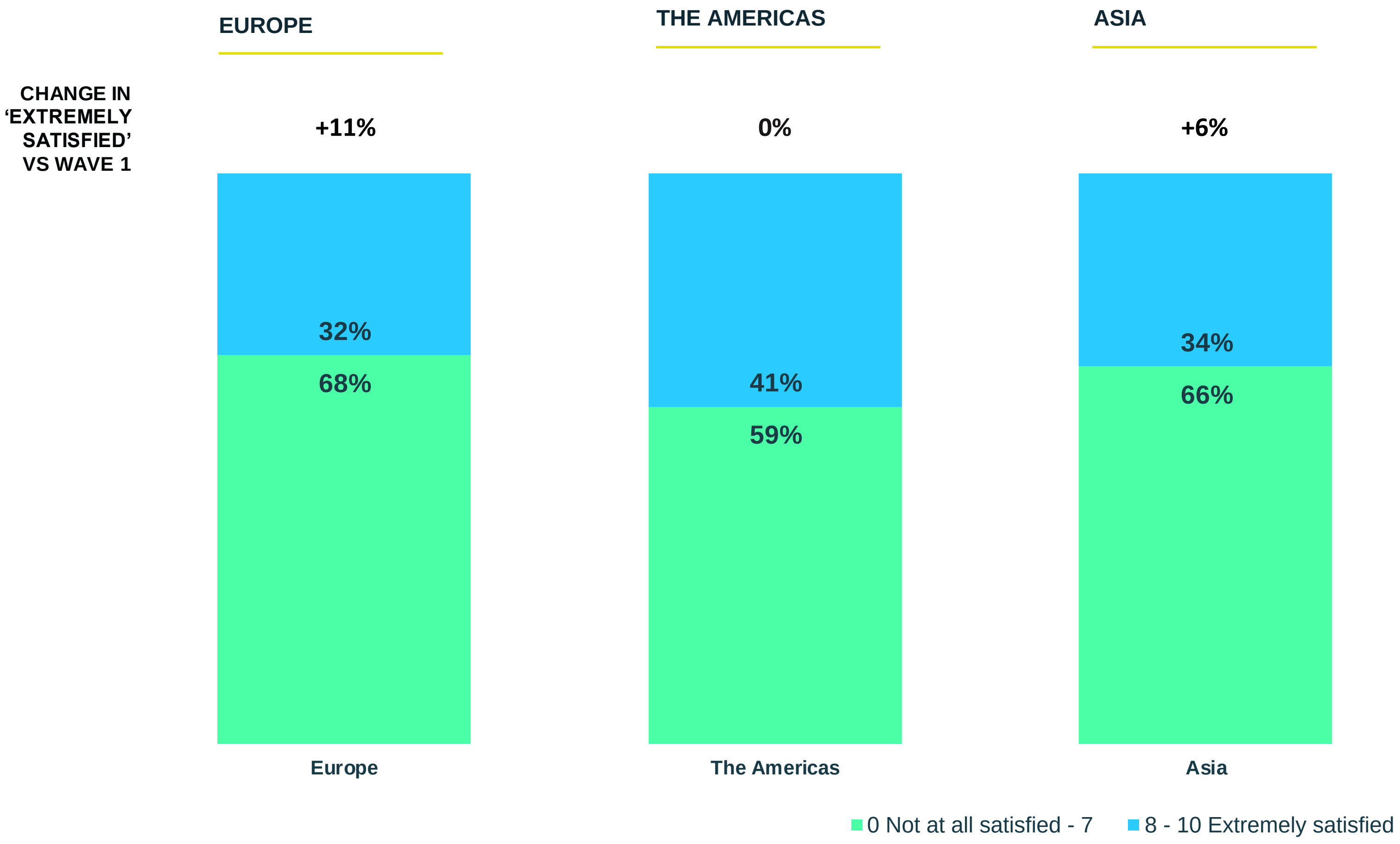
- People are spending less on clothing (including athleisure), car purchasing, and activities overall.

- Household cleaning and entertainment/subscriptions are the areas consumers are most interested in seeing new and different products across all regions. In Asia, people are interested in trying new vitamins and supplements.

- The time is now for manufacturers to consider direct to consumer sales. Globally, consumers are overwhelmingly interested in DTC product purchase options.

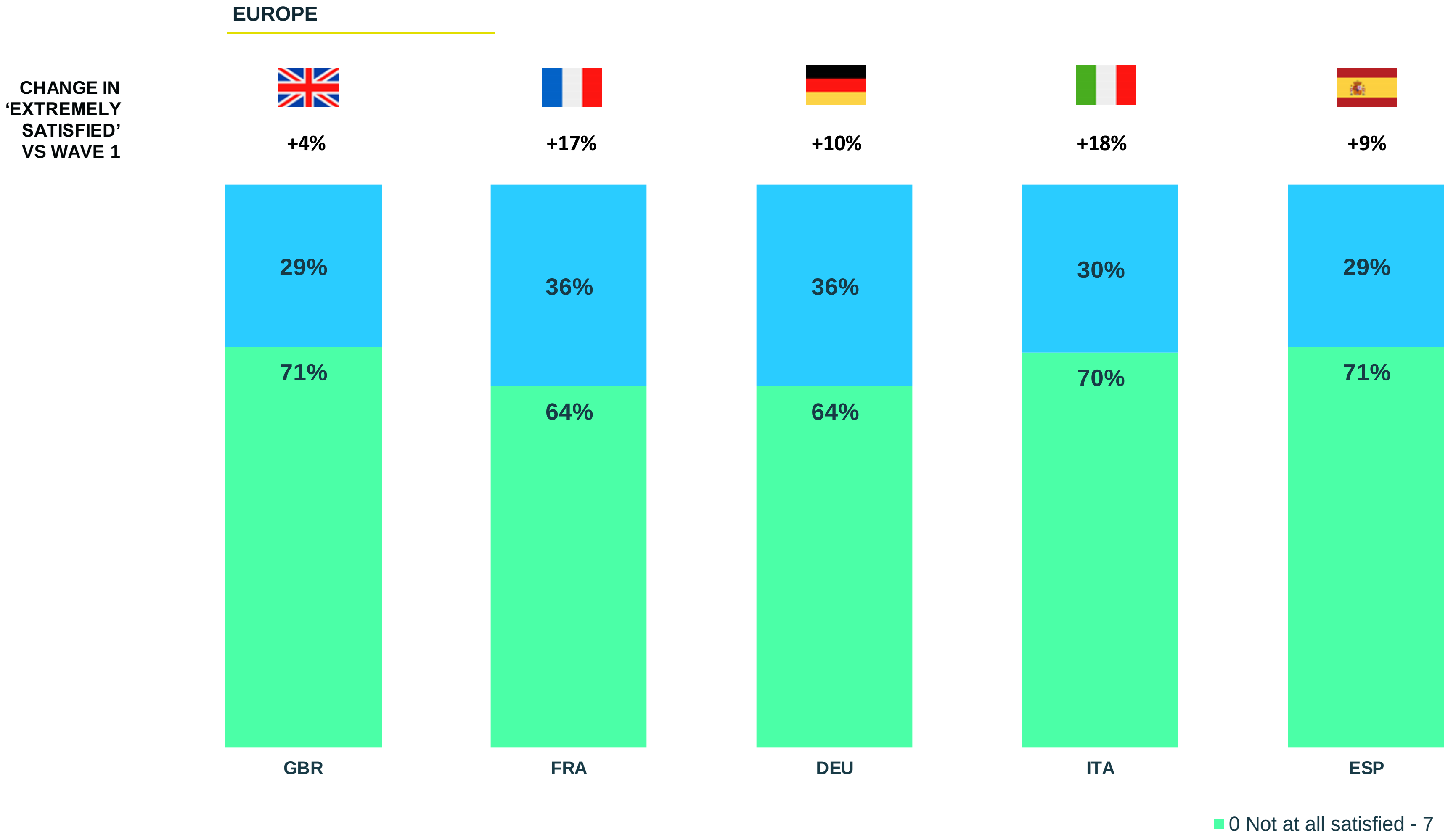
Level of satisfaction with life over the past 2 weeks

Satisfaction with life continues to increase for those in Europe and Asia. Satisfaction has increased the most in Europe since the start of the pandemic.



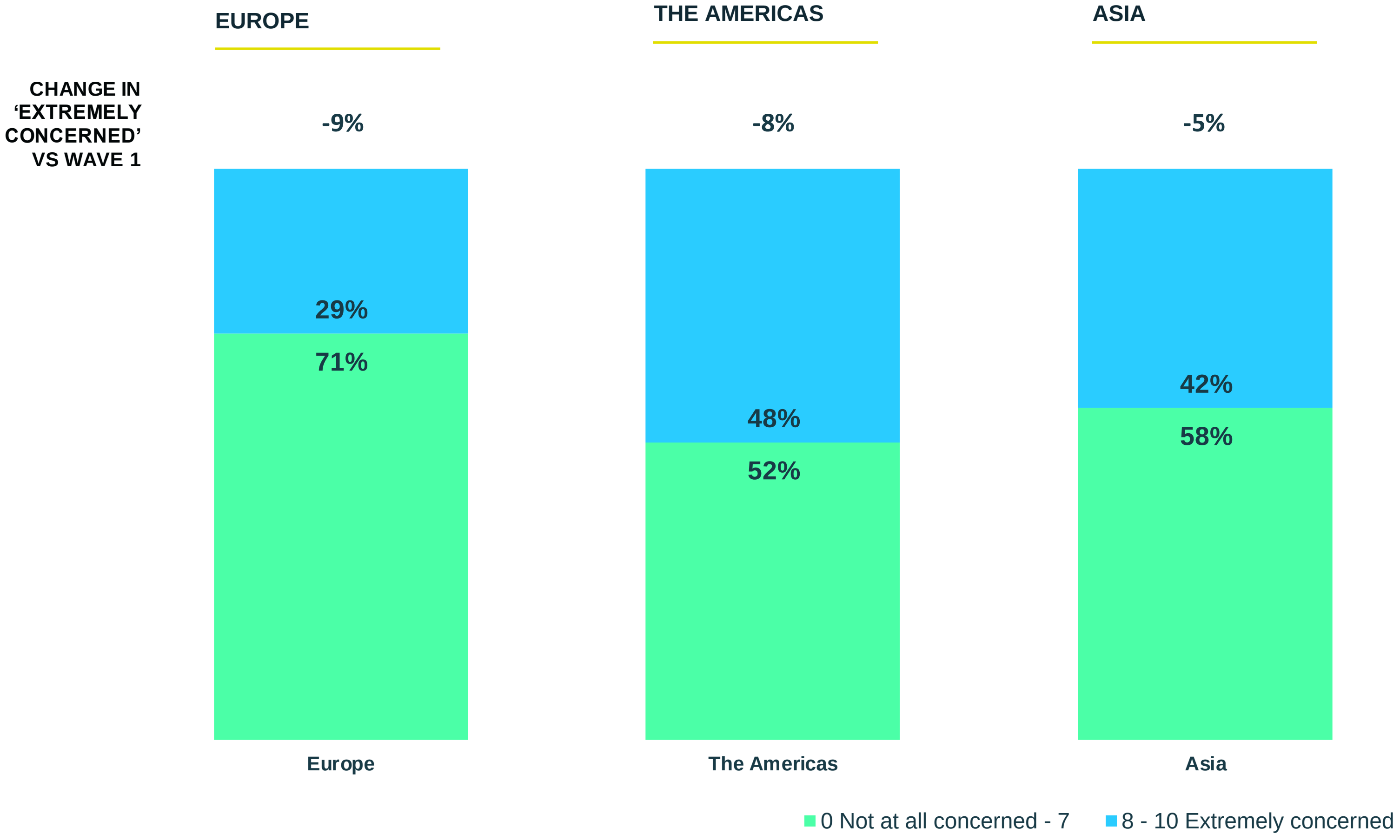
Level of satisfaction with life over the past 2 weeks across European markets

In all European countries satisfaction has increased compared to the beginning of the crisis, particularly for Italy and France.



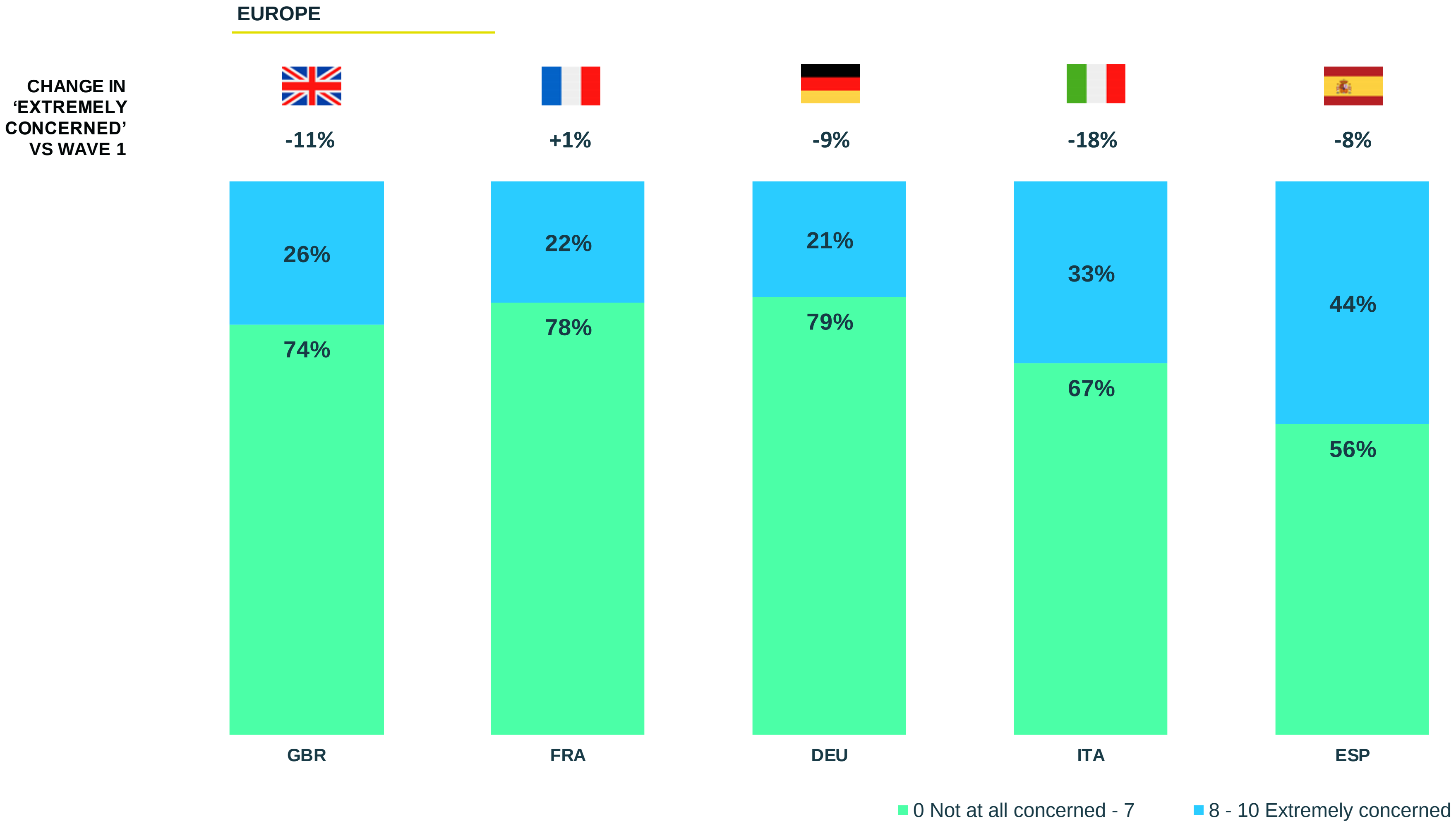
Level of concern about personal financial security

Across all regions, consumers are less concerned about personal financial security than they were in March.



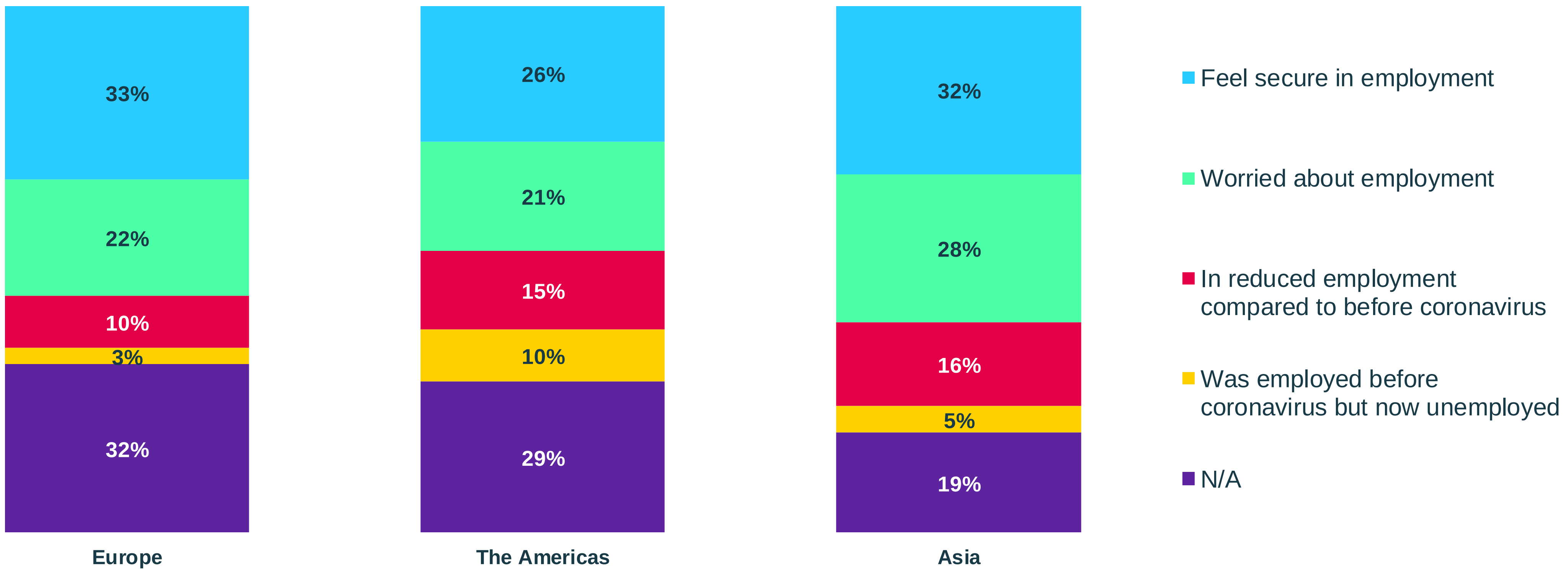
Level of concern about personal financial security across European markets

All European markets aside from France continue to see lower numbers of people who are extremely concerned about financial security compared to the first wave. Concern is highest in Spain followed by Italy.



Current employment situation

The Americas have the lowest proportion who feel secure in their employment and the largest proportion now unemployed.

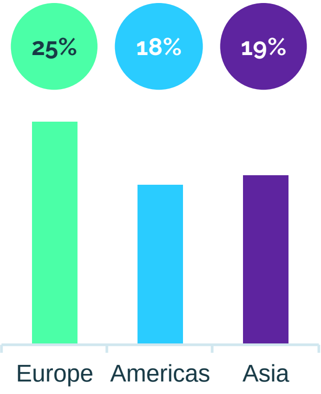


Season comfortable with booking an event or holiday

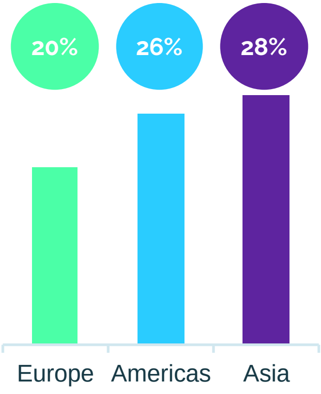
In Europe, consumers are more comfortable with booking a holiday or event to take place in the next few months. Confidence is lower in the Americas and Asia where a higher proportion are pushing back to the end of the year.

Event taking place in…

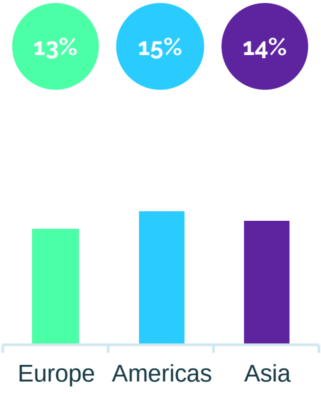
July – Oct 2020



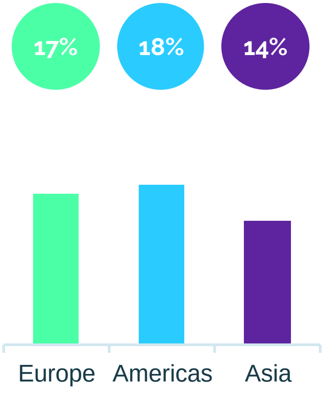
Nov 2020 – Jan 2021



Feb – April 2021



May – July 2021



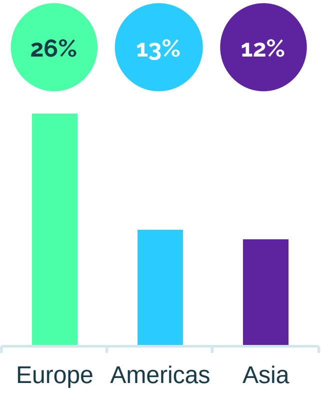
25%

24%

25%
Wouldn't be comfortable with any

Holiday taking place in…

July – Oct 2020



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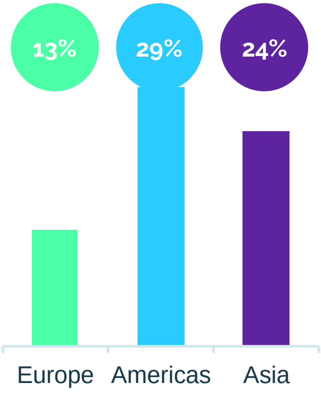
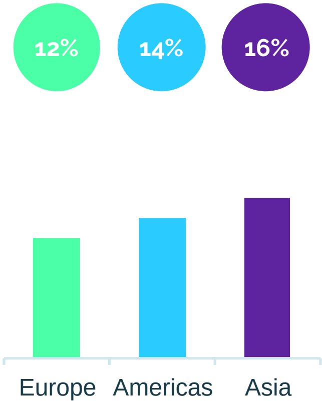
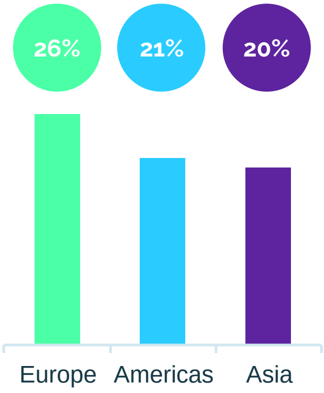


Feb – April 2021



May – July 2021



23%

24%

29%
Wouldn't be comfortable with any

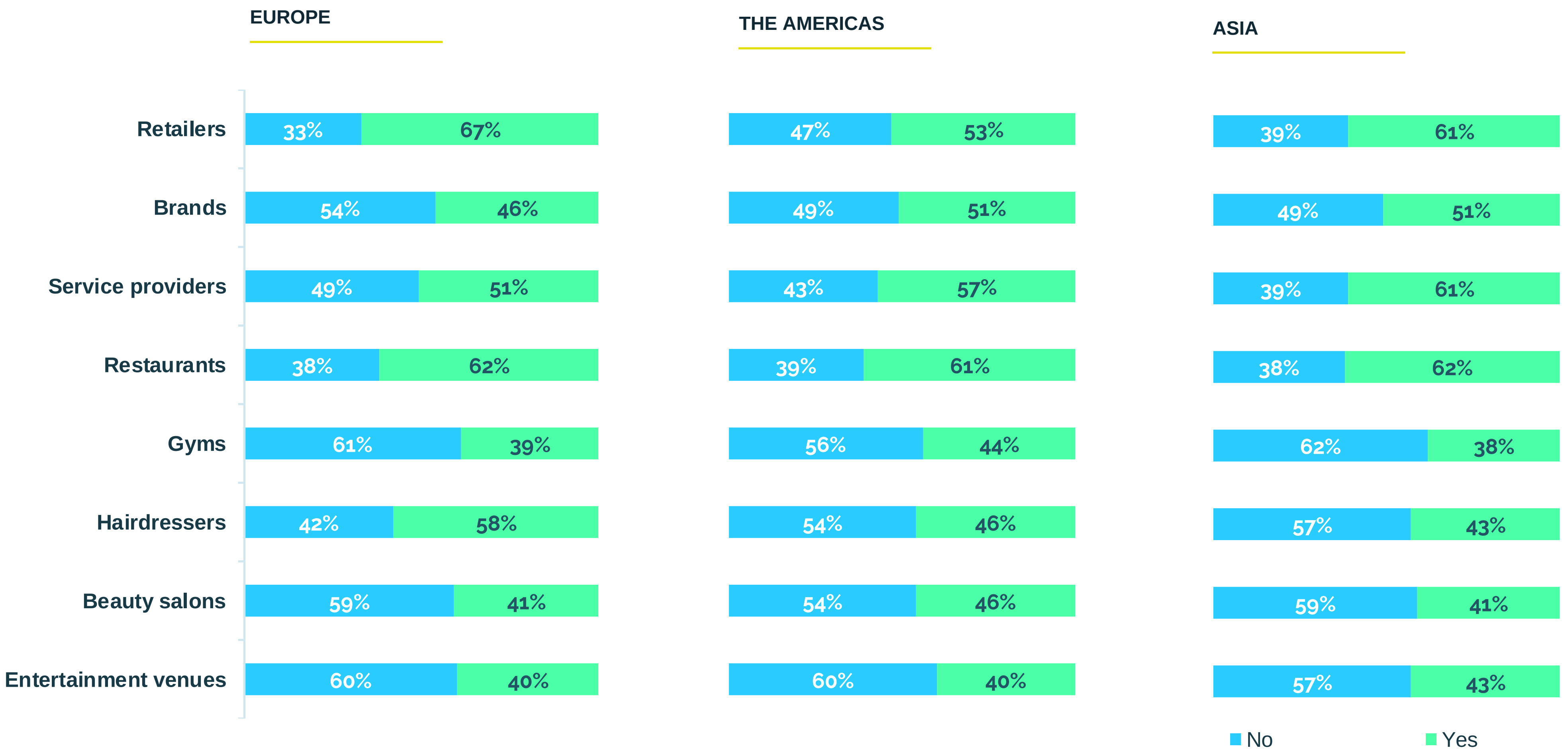
Activities likely to undertake in the next 1-2 months as restrictions ease

Going out to eat, thinking more carefully about spending and being more health conscious continue to be activities that many consumers plan to undertake where possible as restrictions ease. **Consumers in Asia are more likely to be more health and spend conscious, while in Europe, going out to eat and visiting the hairdressers are more eagerly anticipated.**

Activities likely to undertake (Top 10)	Europe	The Americas	Asia
Be more health conscious i.e. taking more exercise/eating healthy	34%	45%	53%
Go out to eat	49%	40%	41%
Think more carefully about what I spend my money on	35%	47%	48%
Be more health conscious i.e. using vitamins	22%	37%	44%
Be more environmentally conscious	29%	32%	40%
Be more optimistic about the future	25%	38%	32%
Go to the hairdressers/ salon	37%	30%	29%
Have routine-check up more frequently (blood-pressure, blood levels, cardio-vascular test etc.)	20%	35%	26%
Treat myself (and family) to a holiday in my country	29%	15%	22%
Go to the cinema/ theatre	24%	21%	21%
Return to workplace	18%	21%	23%
Go to the gym	14%	20%	16%

Sufficient communications around safety measures by industry

Restaurants are perceived to be providing sufficient communications around safety measures by around 6 in 10 within each market. Gyms, beauty salons and entertainment venues need to do more to provide reassurance, where less than half feel communications are sufficient.



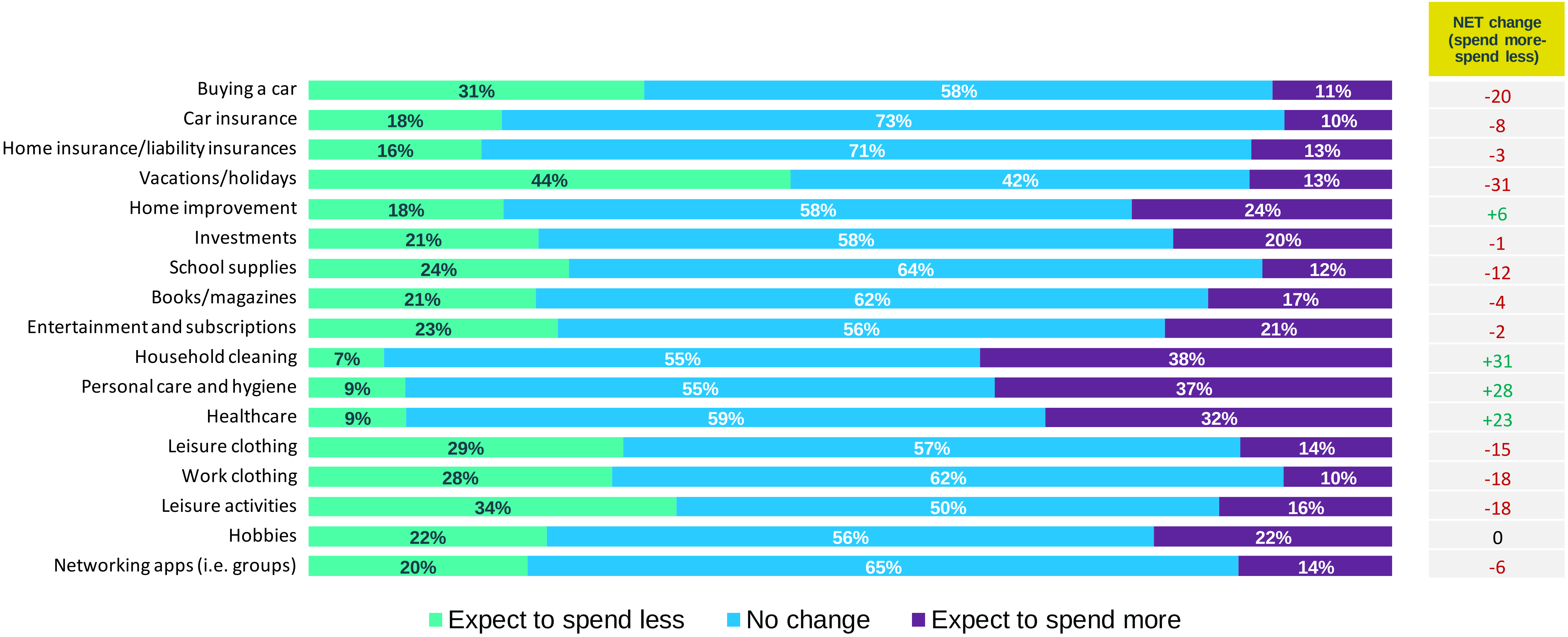
Perceptions of communications received by industry – global overview

Communications from key industries are most likely to be considered helpful, however a minority find comms received irrelevant.

		Retailers	Brands	Service providers	Restaurants	Gyms	Hairdressers	Beauty salons	Entertainment venues
Positive	**Helpful**	35%	29%	34%	35%	23%	28%	25%	25%
	Quick to read	19%	17%	17%	18%	13%	15%	14%	15%
	Timely	20%	17%	19%	20%	14%	17%	15%	15%
Negative	**Irrelevant**	8%	11%	9%	7%	12%	10%	12%	12%
	Annoying	5%	6%	6%	5%	5%	5%	5%	6%
	Confusing	7%	7%	7%	8%	9%	8%	8%	10%

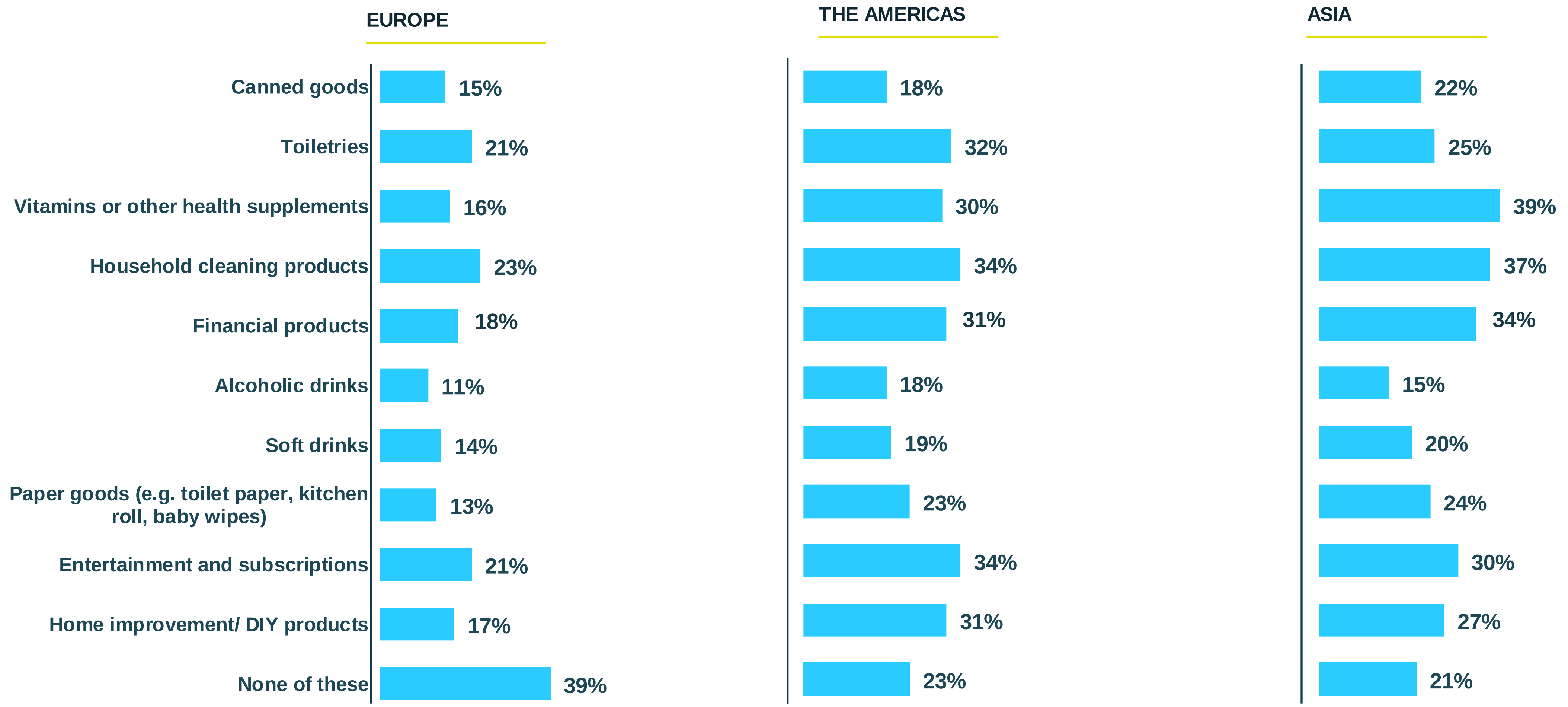
Expectations of spending this year compared to previous years – global overview

Consumers are expecting to spend more money than previous years on household cleaning, personal care and hygiene products and healthcare.



Areas consumers want to see brands offer new and different products

Household cleaning and entertainment/subscriptions are the areas consumers are most interested in seeing new and different products across all regions. In Asia and the Americas, vitamins/health supplements and financial products are also appealing.



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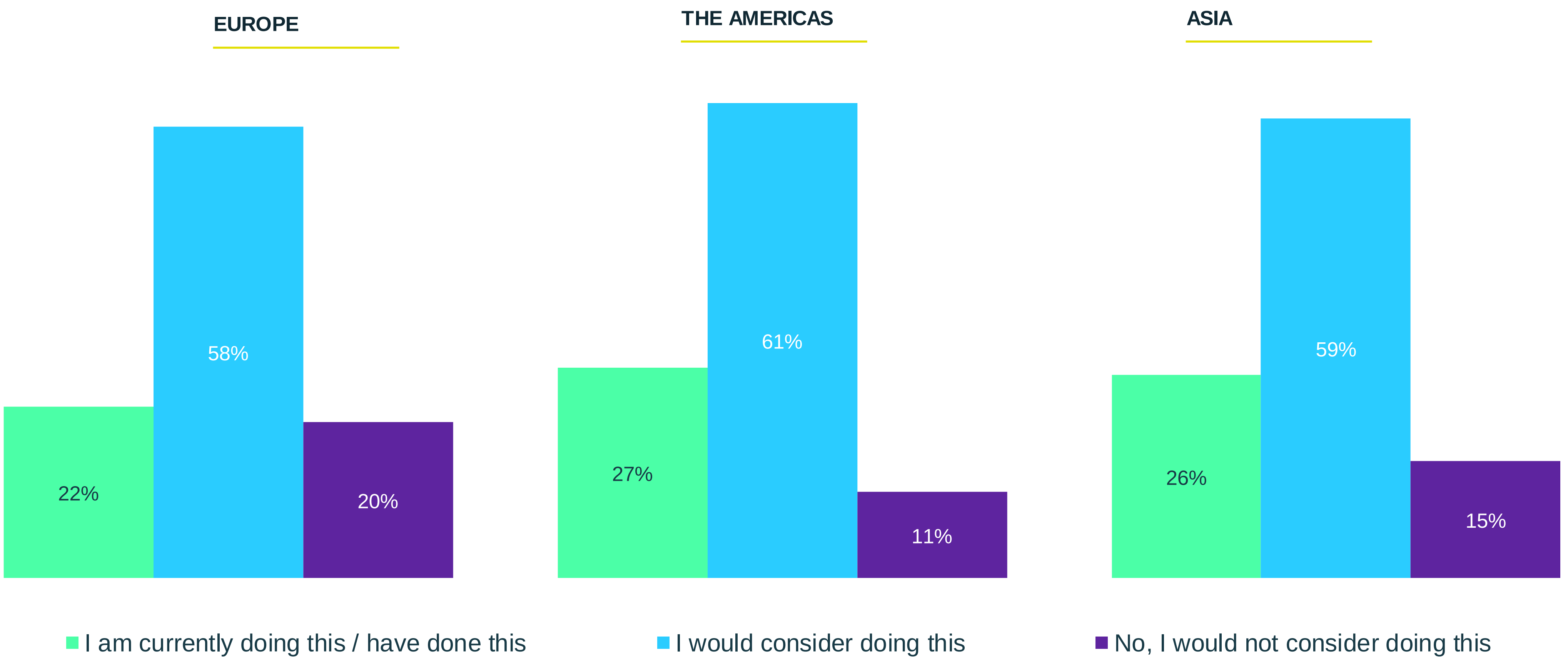
Consideration of buying products direct from the brand or manufacturer

Across all regions, the majority have either previously purchased direct from the brand or manufacturer or would consider doing this.



Beauty

Beauty, hair and wellness routine SINCE Coronavirus

A fifth in the Americas and Asia bought more products to carry out their own beauty/hair treatments at home. A third in the Americas admit they have let their beauty/hair routine slip. Just around 10% in Europe and the Americas have found beauticians, hairdressers etc. to be offering personalized and flexible products at this time.

	Europe	Americas	Asia
I have managed to maintain a comparable beauty/hair routine	16%	21%	25%
I have bought more products to carry out my own beauty/hair treatments at home	16%	22%	21%
I have let my beauty/hair routine slip	16%	31%	19%
My household and I have helped each other by performing in home beauty/hair treatments	16%	18%	22%
I have bought new equipment to carry out beauty/hair treatments myself at home	9%	14%	17%
I have watched online/virtual lessons to help me with my beauty/hair treatments at home	8%	13%	16%
My beautician, spa, hairdressers, nail bar is offering more personalised, flexible products and services as a result of the way things have changed recently	9%	10%	14%
None of these	35%	20%	25%

Beauty, hair and wellness routine FUTURE expectations

We can see beauty/hair routines have changed since the pandemic, and a proportion plan to continue with their routine at home – particularly in the Americas and Asia. Consumers in Asia are more likely to want flexible products and services.

	Europe	Americas	Asia
I will continue with my beauty/hair routine at home	20%	29%	26%
I am very eager to get back to the beauticians, spa, hairdressers, nail bar etc	21%	20%	23%
I am worried about returning to my beauticians, spa, hairdressers, nail bar etc	13%	22%	20%
I am worried about beauticians closing and staff losing jobs if people like me don't go there	16%	21%	17%
I would like my beautician, spa, hairdressers, nail bar to offer more personalised, flexible products and services	10%	10%	21%
I have missed the social aspect of going to the beauticians, spa, hairdressers, nail bar	10%	16%	15%
I will spend more time/money doing my beauty/hair routine at home and less time/money going to the beauticians, spa, hairdressers, nail bar etc	9%	13%	17%
None of these	31%	20%	23%

Consumer Finance

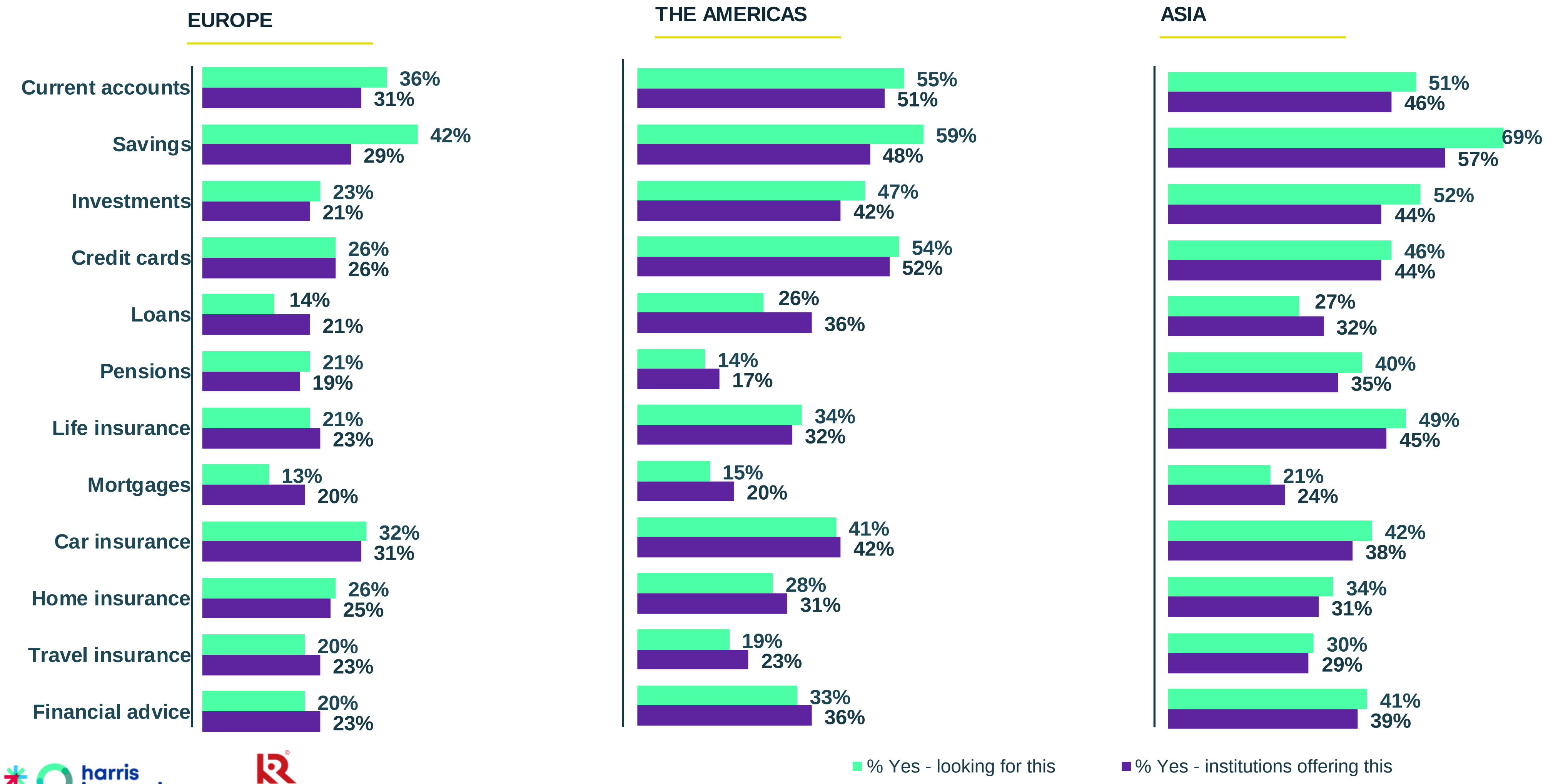
Consumers plans regarding financial products and services

Over half in the Americas and Asia are planning to review their savings as a result of the way things have changed in recent months.

Areas consumers plan to review as a result of recent changes	Europe W8	Americas W8	Asia W8
Where I bank	17%	23%	24%
My insurance policies	16%	13%	28%
My savings	35%	55%	57%
My investments	18%	34%	40%
My pension provision	11%	15%	15%
None of these	46%	27%	24%

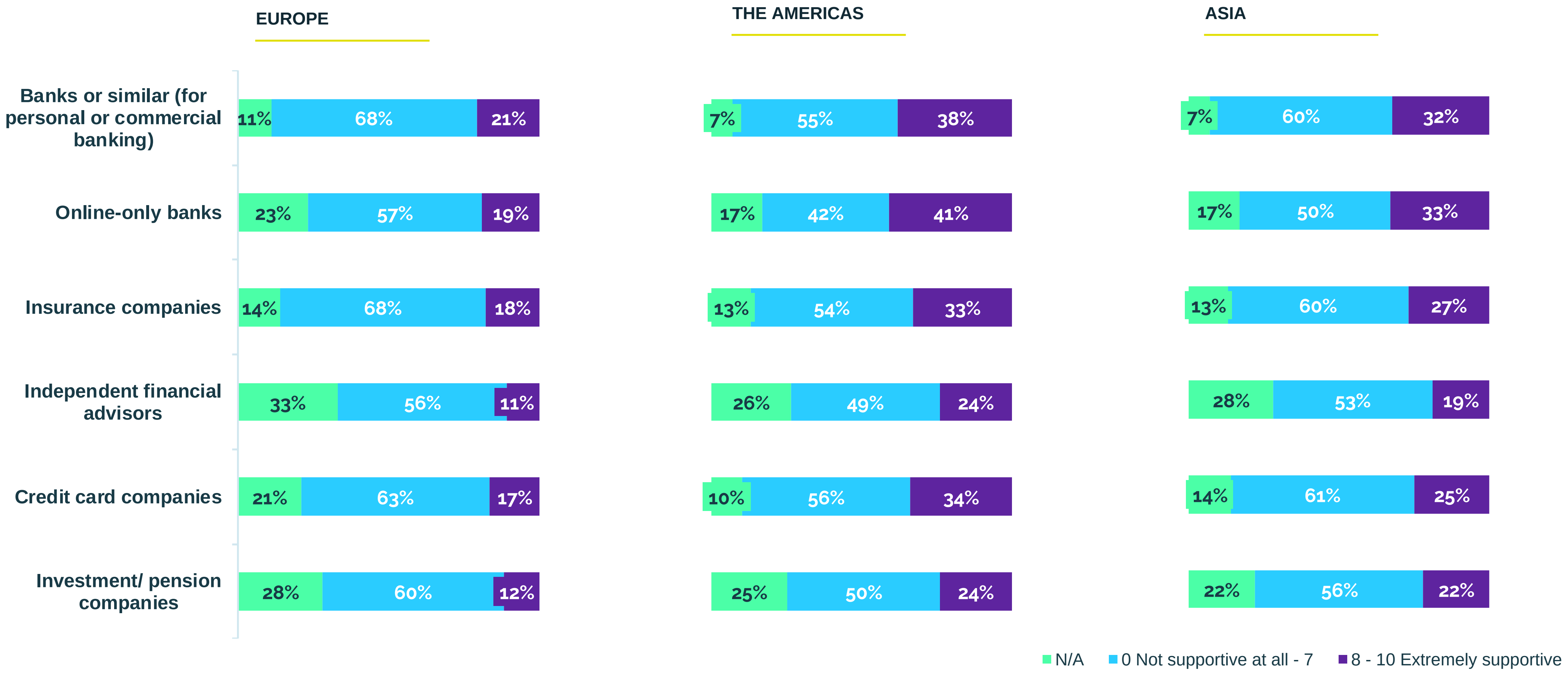
Where are consumers looking for more personalised, flexible products and services and where are institutions offering this?

Consumers are looking for more personalisation and flexibility across a variety of financial products and services, in particular for current accounts and savings over all regions, however there is a disconnect with the number who consider institutions to be offering this in recent months.

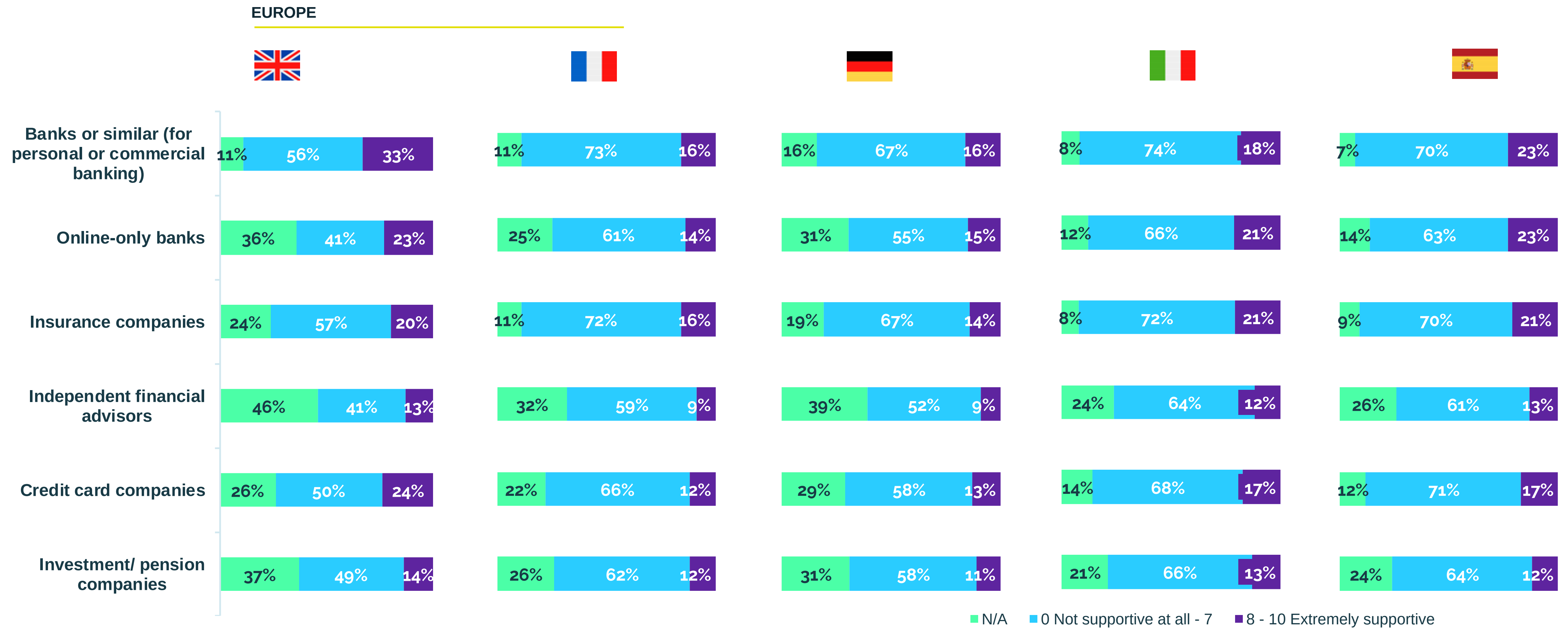


Supportiveness of financial institutions in helping consumers make changes

Financial institutions are perceived to be more supportive in helping consumers make changes to the way they manage services recently by those in the Americas and Asia. Banks and online-only banks are considered the most supportive across all regions.



Supportiveness of financial institutions in helping consumers make changes in European markets



Behaviour towards charitable donations

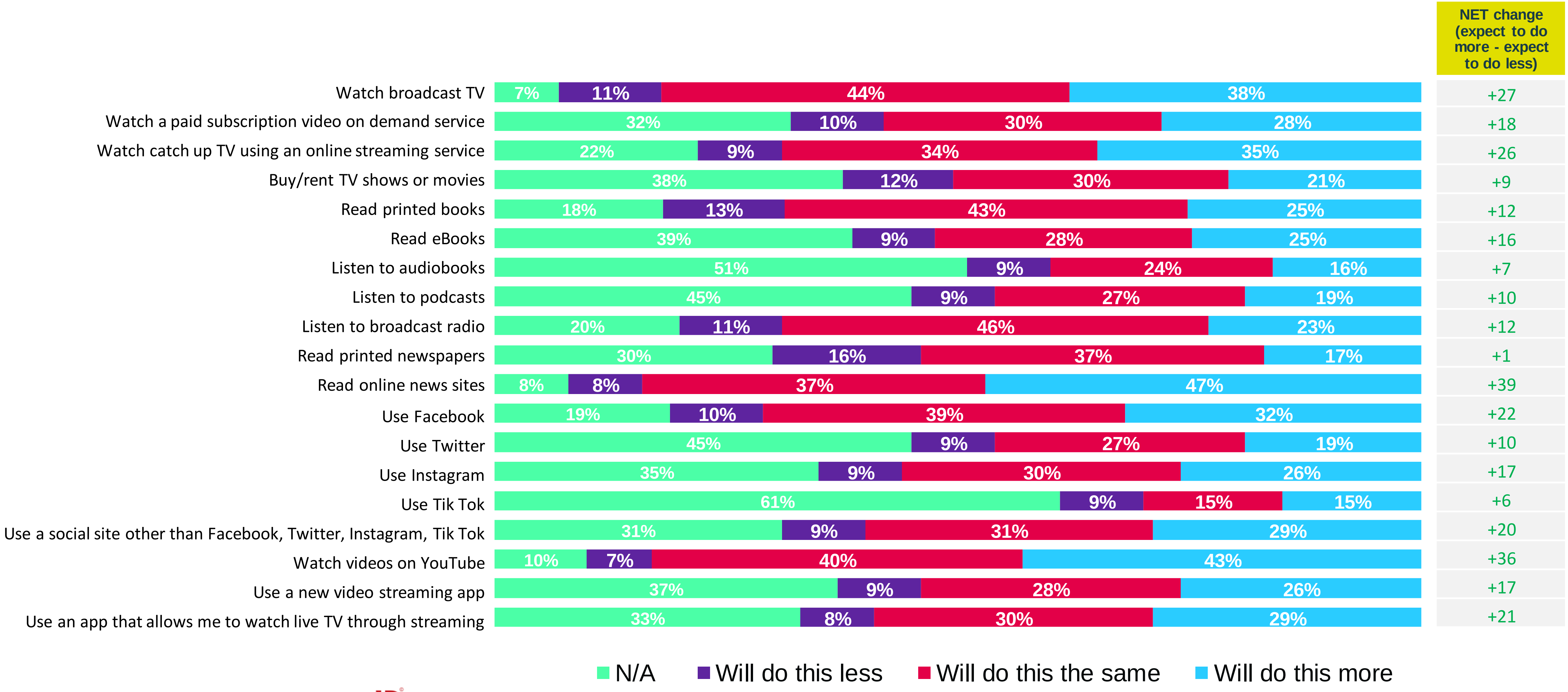
Habits around charitable behaviour differ across regions, with consumers in the Americas and Asia more likely to currently donate or consider donating in future.

	Europe	Americas	Asia
	W8	W8	W8
I don't regularly donate to charity at the moment and I am unlikely to do so after coronavirus	50%	31%	33%
I don't regularly donate to charity at the moment, but I will start to do so after coronavirus	19%	28%	27%
I regularly donate to charity at the moment and I will continue to do so after coronavirus	28%	36%	34%
I regularly donate to charity at the moment, but I am unlikely to do so after coronavirus	4%	6%	6%

Entertainment & Media

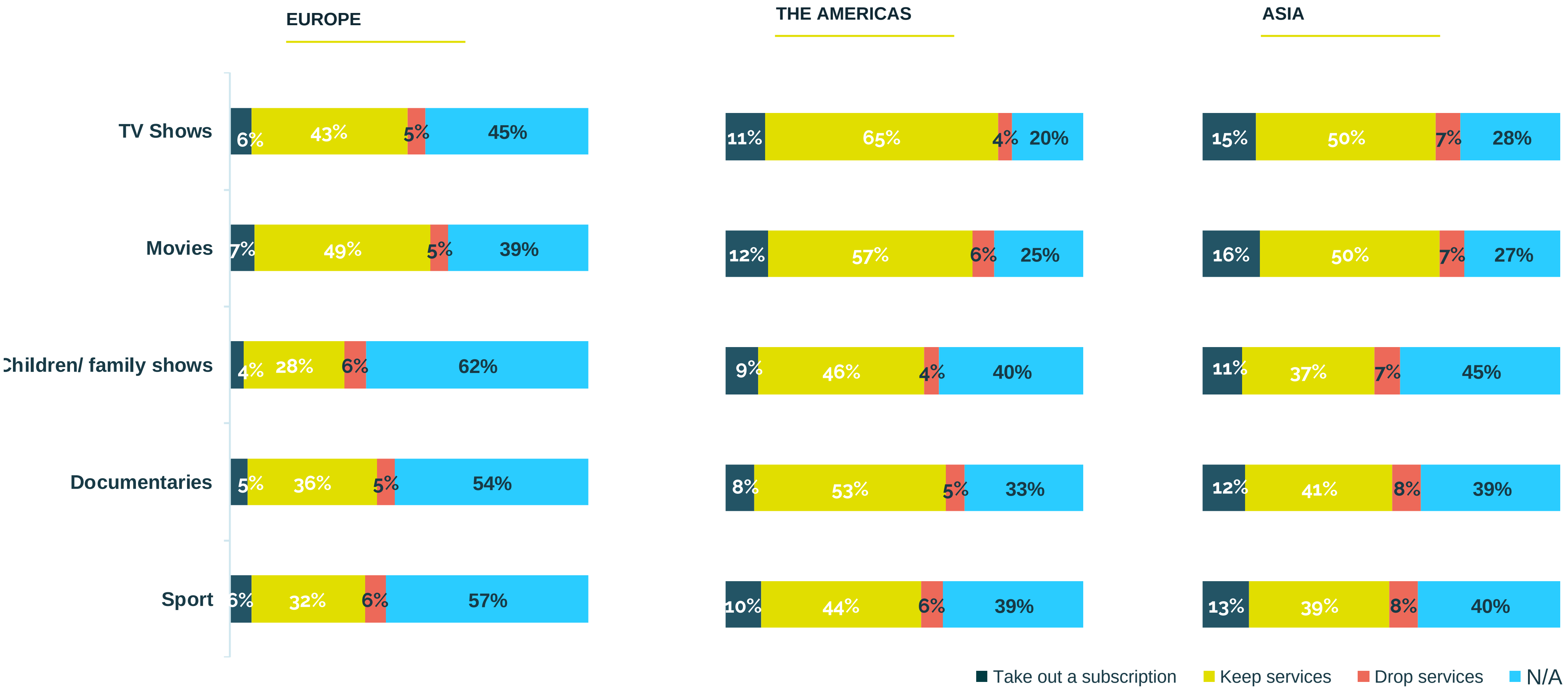
Expectations for content viewing, reading and social media habits POST Covid-19 – global overview

Consumers are expecting to either continue with the same level of media usage as before the pandemic, or to watch, read or listen more, particularly for reading online news sites, watching videos on YouTube, watching broadcast TV and watching catch up TV online.



Will consumers keep subscriptions that were subscribed to during Covid-19?

Most consumers who have subscriptions intend to keep these services going forwards.



Expectations for playing/watching video games POST Covid-19

Not all consumers will continue watching/playing video games at the same level after the pandemic. In Europe, a decrease in usage is expected. In the Americas and Asia consumers expect to watch less sports and online games, however playing on video game consoles and mobile phone/tablet devices is expected to increase.

	Europe	Americas	Asia
Playing on a video game console (e.g. PlayStation, Xbox, Switch)	-10	+8	+1
Playing on a video game handheld device (e.g. DS, Vita)	-15	0	-3
Playing on a PC/laptop via games embedded in a website	-13	-3	-3
Playing on a PC/laptop via a downloaded, streamed or physical game (not embedded in a website)	-9	0	+1
Playing on a mobile phone or tablet device	-8	+4	+11
Watching professional esports matches/leagues/tournaments online or live in-person	-13	-5	-2
Watching professional esports matches/leagues/tournaments on TV	-15	-2	-5
Watching people play video games online	-17	-5	-4

Anticipated future net change = ***more*** *minus* ***less/stop doing this***

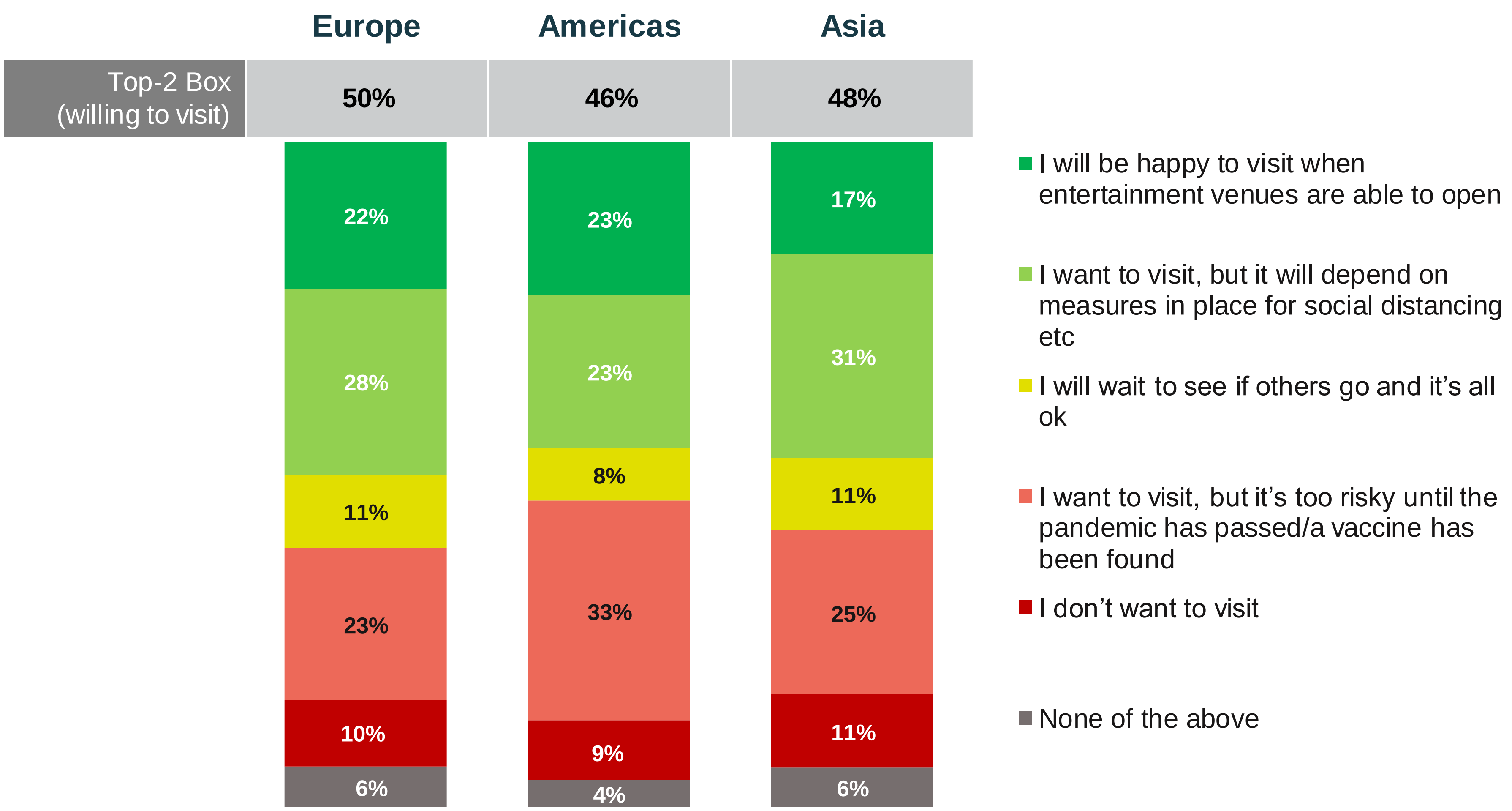
Events / venues visited regularly before Covid-19

Restaurants and cinemas were the two most popular entertainment venues visited before Covid-19 across all three regions. Live music, shows and sport events were more popular in the Americas.

	Europe	Americas	Asia
Restaurants	73%	82%	76%
Cinemas/movie theatres	54%	63%	60%
Pubs/bars/clubs	46%	44%	28%
Live music events (e.g. concerts, gigs, festivals)	31%	43%	31%
Live shows e.g. plays and musicals	29%	37%	24%
Live sports events (e.g. rugby, football, tennis, cricket)	23%	32%	26%
Casinos	7%	12%	7%
None of these	14%	9%	13%

Likelihood of visiting entertainment venues when they re-open

Consumers across the three regions are broadly aligned in their willingness to visit entertainment venues post-lockdown. Around half want to return, however a significant proportion have reservations and may be difficult to persuade to return initially.



Impact of special measures on likelihood of visiting entertainment venues when they re-open

Limiting numbers and hand sanitiser/masks provided are the top two measures across all regions that would encourage consumers to visit.

	Europe	Americas	Asia
Limited numbers allowing social distancing	44%	55%	40%
Hand sanitiser and masks provided	43%	57%	46%
Temperature checks prior to allowing people into the venue (to check for fever)	31%	50%	38%
Perspex screens between people (where possible)	23%	34%	25%
Bring your own food and drink	2%	19%	19%
Outdoor areas only	40%	44%	21%
Friend and family only areas	30%	42%	35%

- Temperature checks are more appealing in the Americas and Asia but less so in Europe.
- Bringing your own food is unpopular in Europe while outdoor areas only resonates less positively in Asia.

Net intention to visit = more likely to visit minus it would put me off