Understanding the 2020 consumer

Wave 9 Global Barometer Study

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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 9: 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	1,118	30th July – 4th August
France	1,114	30th July – 4th August
Germany	1,086	30th July – 4th August
Italy	1,122	30th July – 4th August
Spain	1,112	30th July – 4th August

Market	Completed Interviews	Fieldwork Dates
Australia	1,093	30th July – 4th August
Singapore	563	30th July – 4th August
Malaysia	560	30th July – 4th August
Indonesia	567	30th July – 4th August
Philippines	552	30th July – 4th August
Thailand	574	30th July – 4th August
Japan	1,126	30th July – 4th August
Korea	1,110	30th July – 4th August
China	1,078	30th July – 4th August
Hong Kong	553	30th July – 4th August
India	1,061	30th July – 4th August
UAE	544	30th July – 4th August

Market	Completed Interviews	Fieldwork Dates
US	1,063	30th July – 4th August
Brazil	1,165	30th July – 4th August

Consumer behavior continues to change as well as expectations from brands and businesses

- Globally, consumers still expect to spend more on household cleaning, personal care/hygiene products and healthcare and less on non-essentials (new cars/holidays etc.).
- They also expect brands within the household cleaning and healthcare space to offer more new and different products for them to buy from as well.
- Entertainment/subscription services and home DIY brands are also expected to offer more innovation in the near future.
- Over four in five consumers are prepared to buy directly from a brand or company in the future as people adapt to greater reliance on online shopping.
- There are signs that consumers are getting back to normal though with half of European consumers expecting to eat out in the coming months.
- Meanwhile, satisfaction with life continues to increase in Europe and sees some small growth in the Americas.

Here’s what marketers need to keep in mind

- Consumers across the world expect brands to provide more innovation, but particularly in the Americas and Asia.

Health and Beauty

- A high proportion of consumers globally are claiming they will continue their beauty/hair routine at home in future, presenting an opportunity for brands to service these needs.

Financial Services

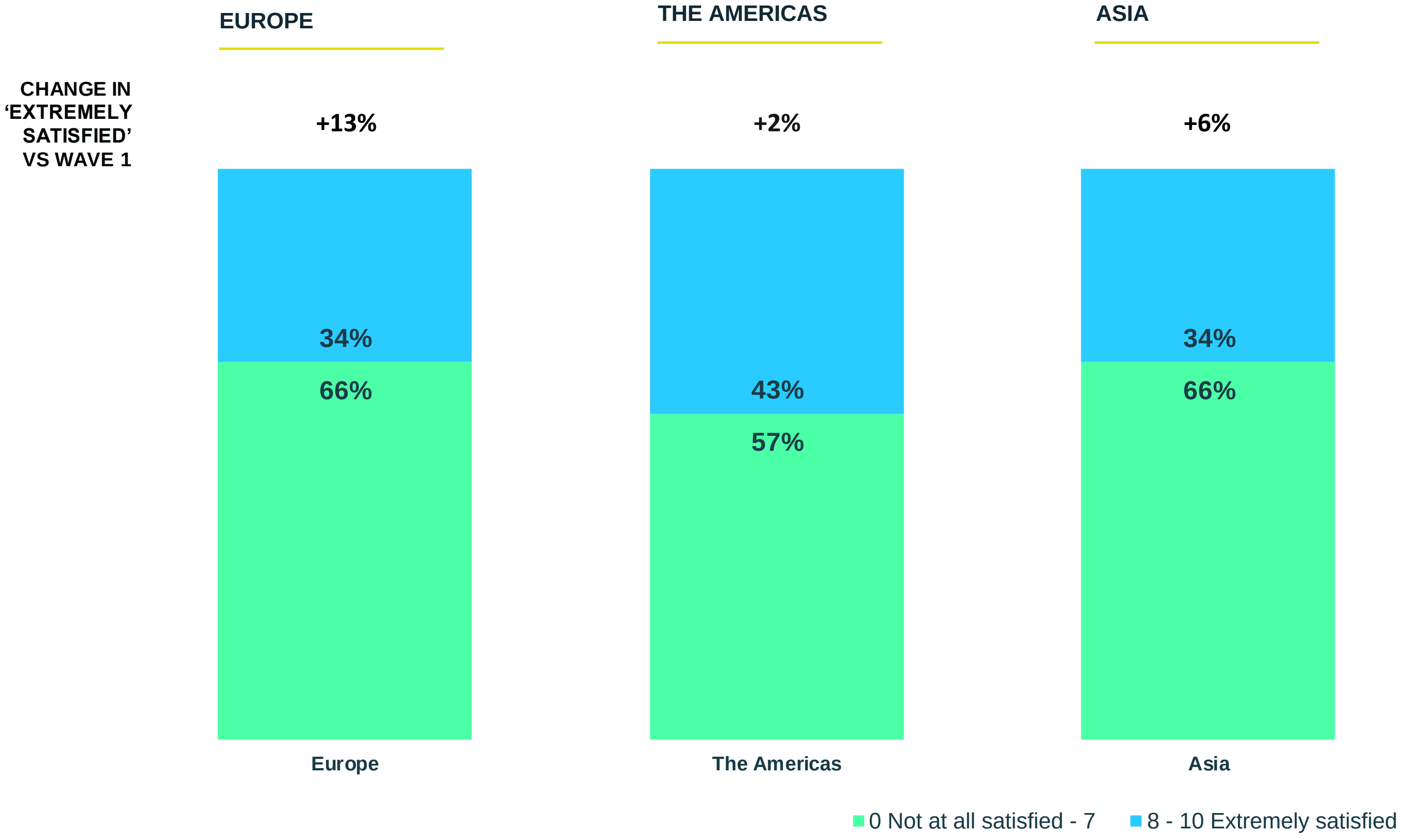
- There is some disparity between what consumers are looking for and what institutions are providing for savings products, while there is felt to be more innovation for loans (including mortgages) than consumers deem necessary.

Entertainment & Media

- Consumers will be willing to visit entertainment venues when they will reopen, but those in Europe and Asia will depend more on the social distancing measures put in place than those in the Americas.

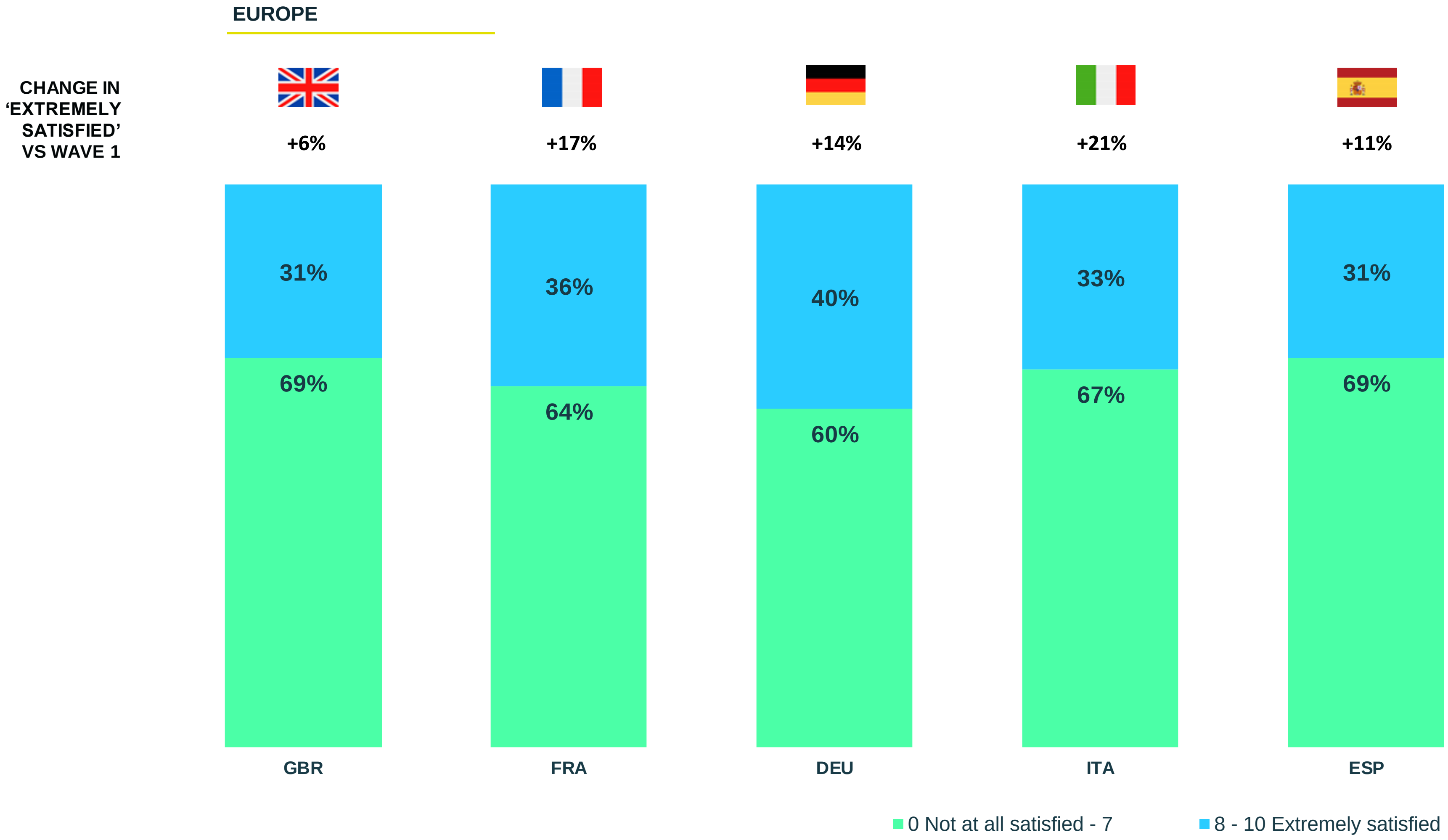
Level of satisfaction with life over the past 2 weeks

Satisfaction with life increases further in Europe, while in the Americas consumers are slowly starting to see some increase since the pandemic started.



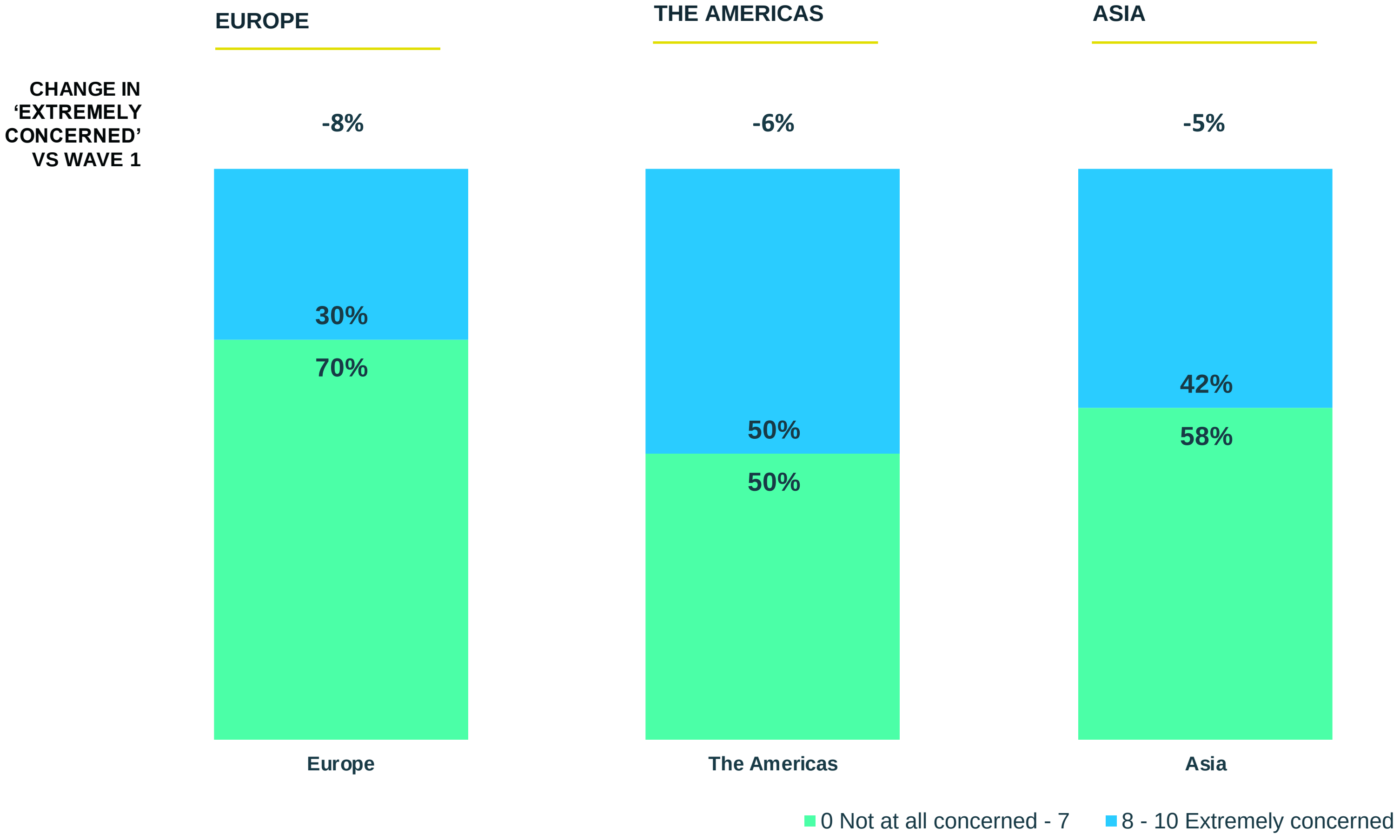
Level of satisfaction with life over the past 2 weeks across European markets

Increase in satisfaction across Europe is driven by all countries, with Italy seeing the greatest increase since the start of the pandemic. Consumers in Germany are most satisfied at the moment though.



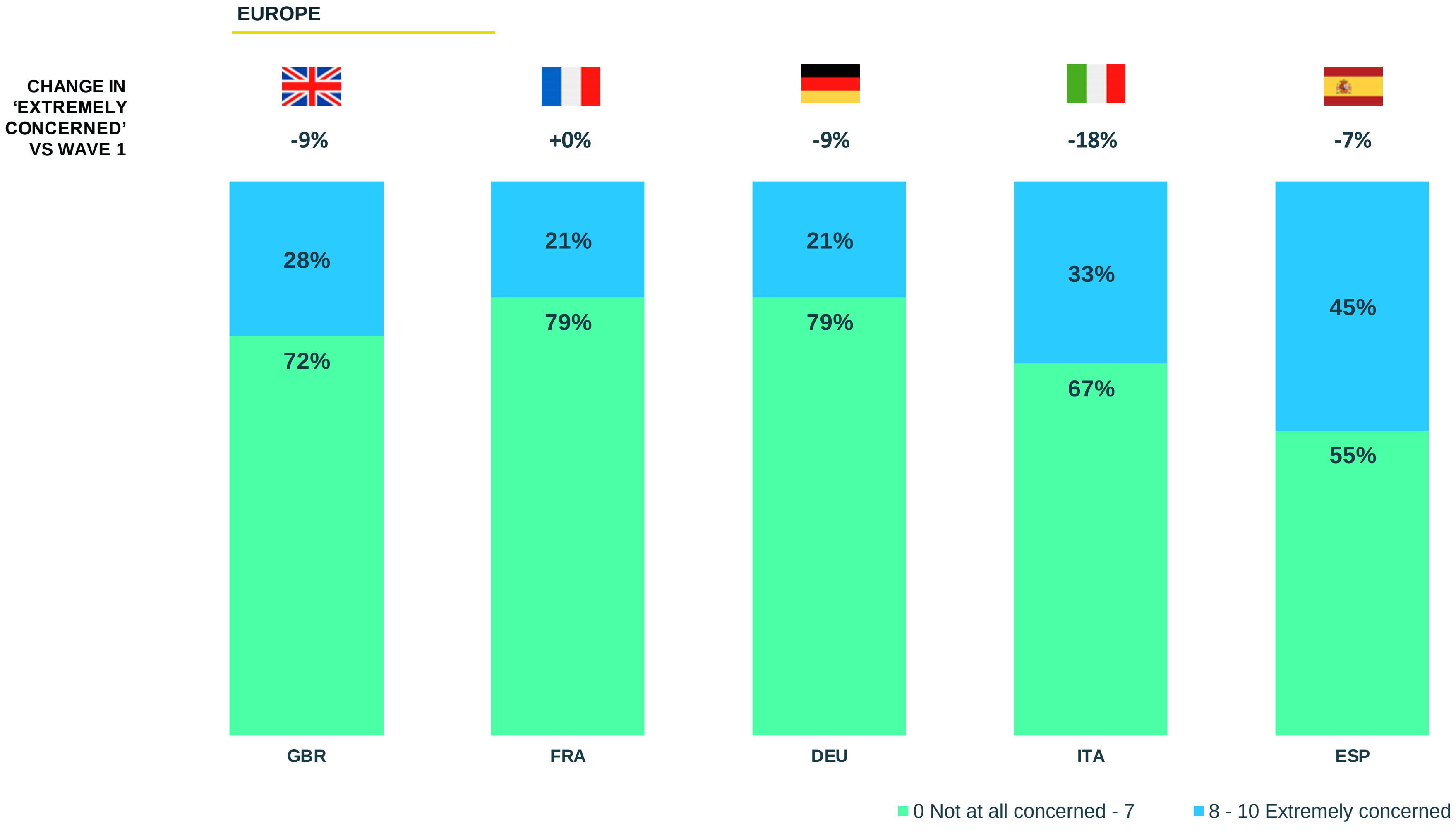
Level of concern about personal financial security

Compared to when the pandemic started, consumers in Europe have seen financial concerns decrease the most, but those in the Americas and Asia are also less worried too.



Level of concern about personal financial security across European markets

Despite dropping since March, consumers in Spain are the most concerned about financial security in Europe. Italy has seen the biggest drop but a third are still extremely concerned.



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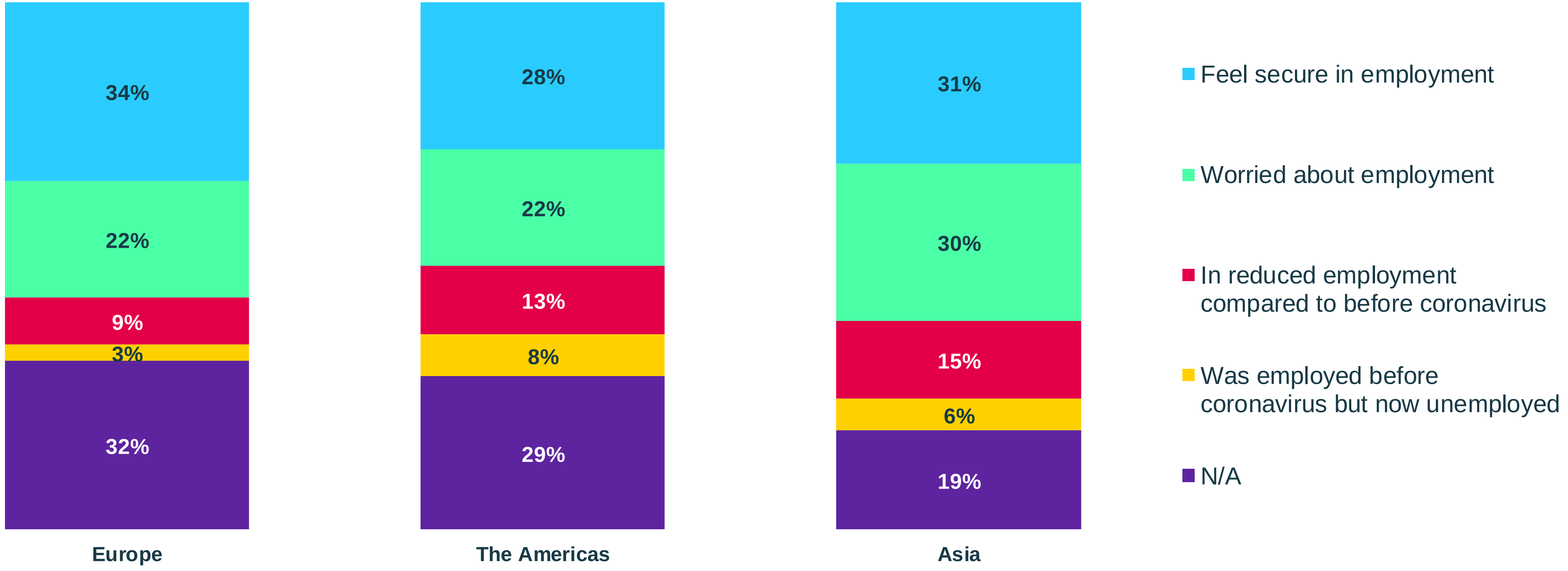
Current employment situation

Current job security is still a concern across the globe with a third of consumers in Europe either worried about employment, in reduced employment or now without a job. This figure rises in the Americas (which has the largest level of new unemployment) and Asia, where a fifth of people have seen their employment reduced or lost and a further third are worried about it.

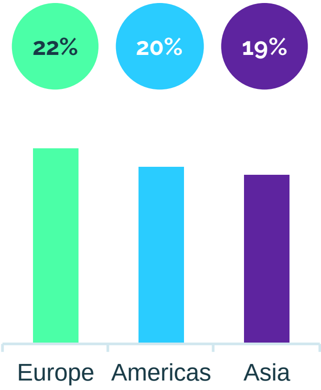


Season comfortable with booking an event or holiday

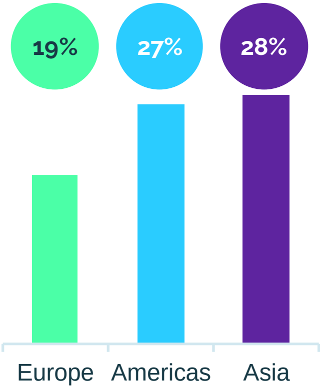
Comfort with an event taking place in the next 3 months is similar across the globe, however in Europe consumers are more worried about one taking place in Dec-Feb – potentially as a result of traditional flu season and likelihood of this bringing another wave. European consumers are more comfortable taking a holiday imminently, but those in Americas and Asia would be more comfortable waiting a few more months.

Event taking place in…

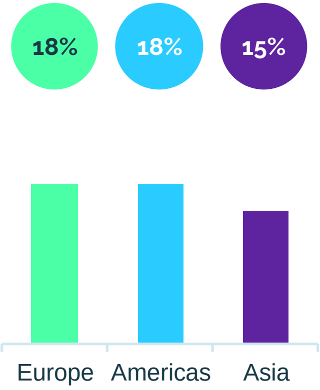
August – Nov 2020



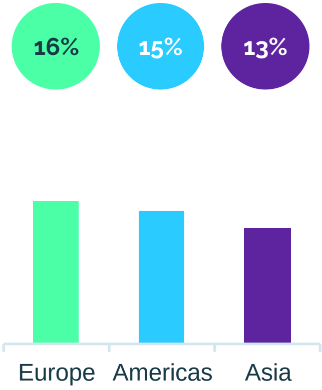
Dec 2020 – Feb 2021



March – May 2021



June – August 2021



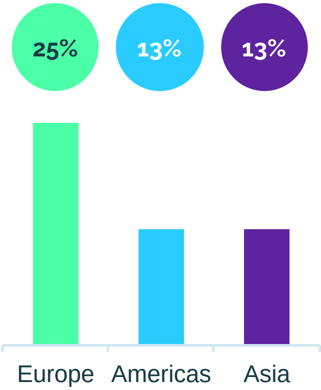
24%

21%

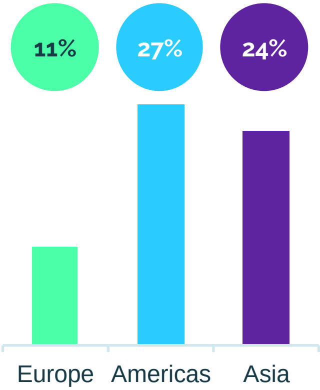
26%
Wouldn't be comfortable with any

Holiday taking place in…

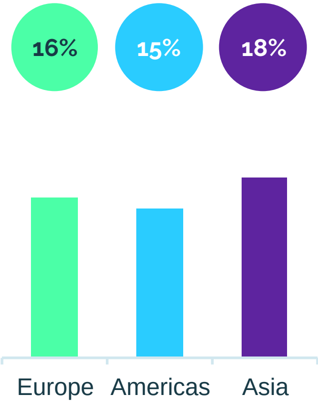
August – Nov 2020



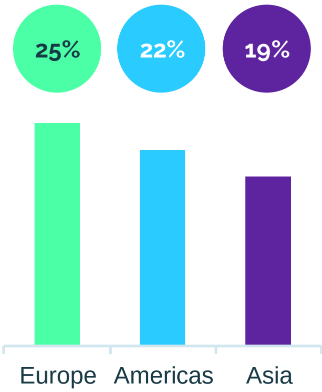
Dec 2020 – Feb 2021



March – May 2021



June – August 2021



22%

21%

28%
Wouldn't be comfortable with any

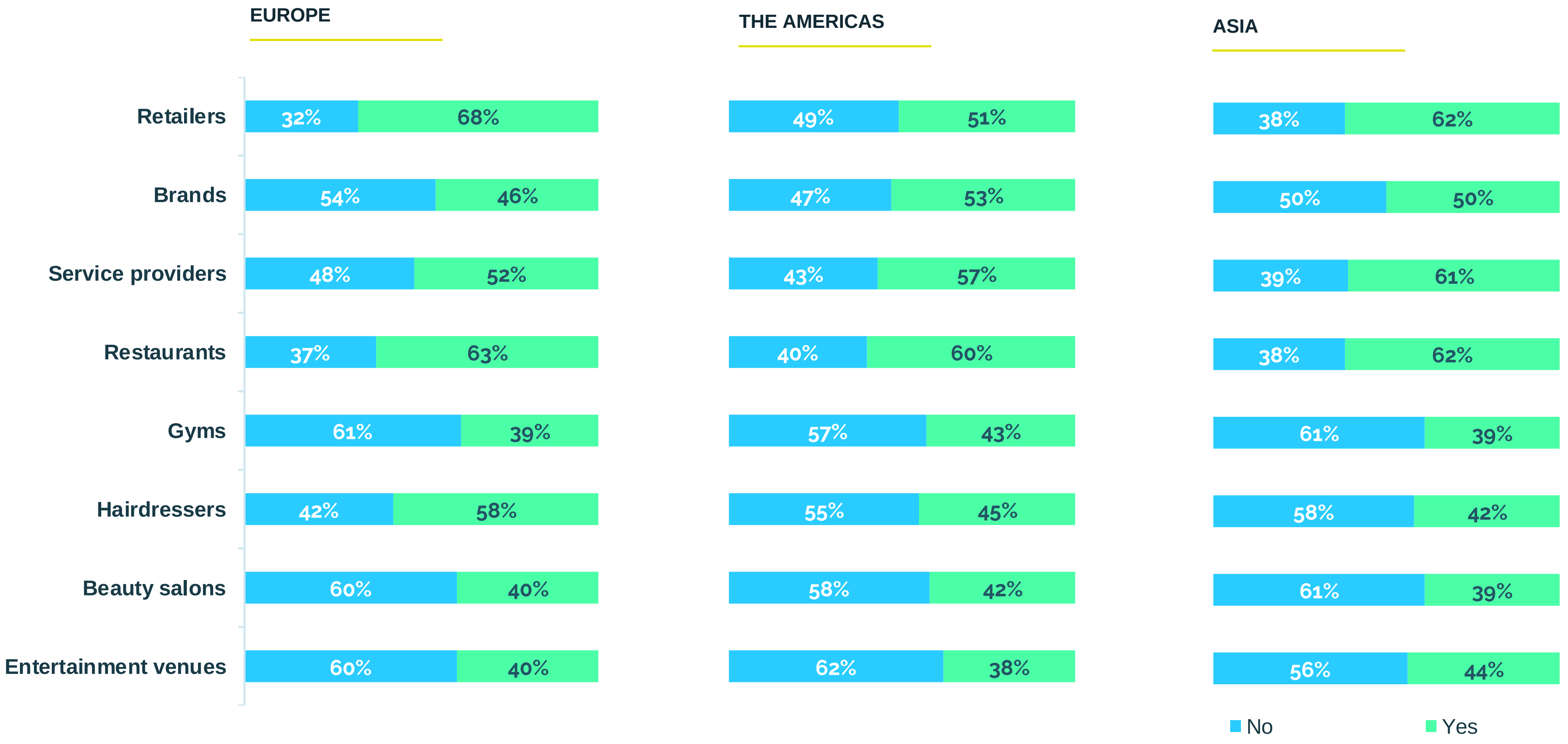
Activities likely to undertake in the next 1-2 months as restrictions ease

Consumers in Europe are most likely to go out to eat as restrictions ease, while in the Americas they are more likely to become more health conscious by doing more exercise, eating healthily and using vitamins. Increased optimism about the future is highest in the Americas.

Activities likely to undertake (Top 10)	Europe	The Americas	Asia
Be more health conscious ie taking more exercise/eating healthy	35%	48%	54%
Think more carefully about what I spend my money on	37%	48%	48%
Go out to eat	49%	39%	40%
Be more health conscious i.e. using vitamins	23%	39%	44%
Be more environmentally conscious	31%	34%	39%
Go to the hairdressers/ salon	35%	30%	28%
Be more optimistic about the future	24%	39%	32%
Have routine-check up more frequently (blood-pressure	20%	34%	27%
Treat myself (and family) to a holiday in my country	29%	17%	23%
Go to the cinema/ theatre	25%	20%	21%

Sufficient communications around safety measures by industry

In Europe, retailers and restaurants are most likely to provide sufficient communication around safety measures, and they are joined by service providers in Asia, however in the Americas retailers could be doing more. Brands are less likely to be providing sufficient communication, particularly in Europe.



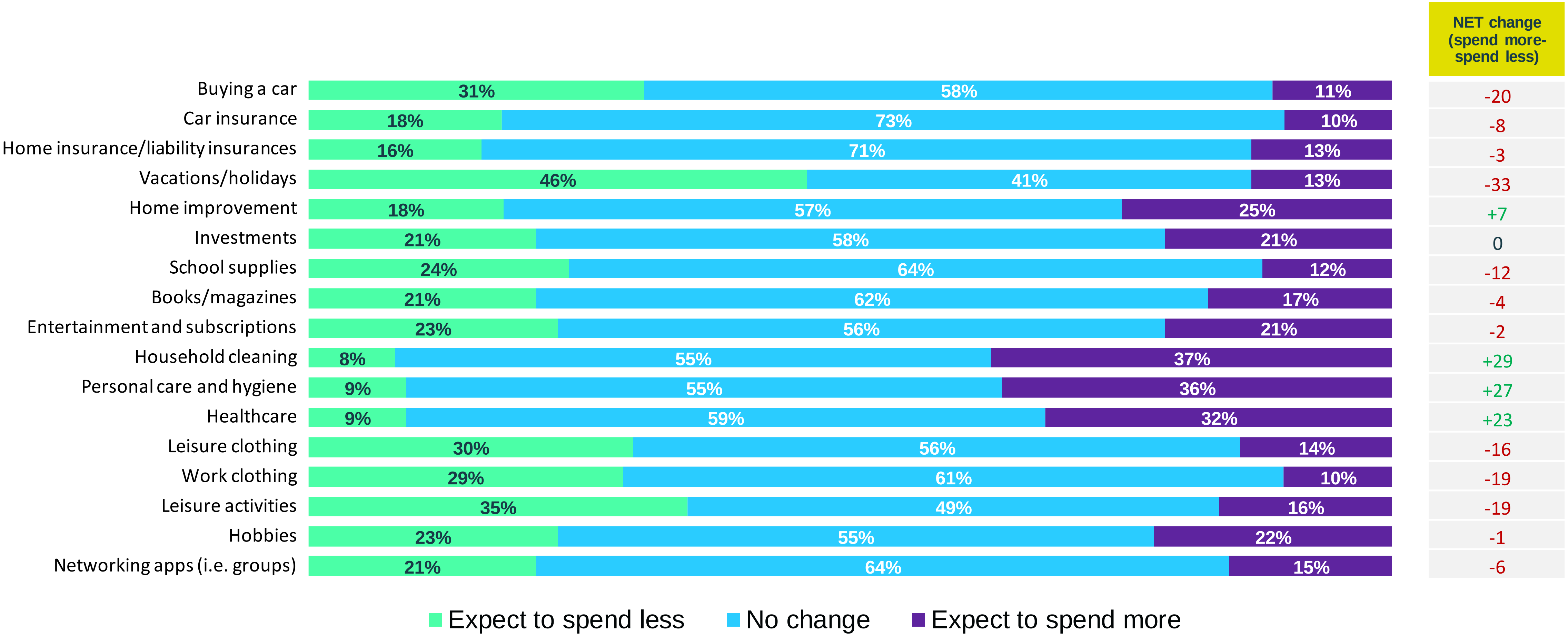
Perceptions of communications received by industry – global overview

Globally, the most helpful communication is being provided by retailers, service providers and restaurants. Compared to these three, brands are considered less helpful and more likely to be irrelevant.

		Retailers	Brands	Service providers	Restaurants	Gyms	Hairdressers	Beauty salons	Entertainment venues
Positive	Helpful	36%	28%	34%	35%	24%	28%	25%	25%
	Quick to read	20%	17%	17%	19%	14%	16%	15%	15%
	Timely	20%	17%	19%	20%	14%	17%	15%	15%
Negative	Irrelevant	8%	11%	9%	7%	12%	10%	11%	11%
	Annoying	5%	5%	6%	5%	5%	5%	5%	6%
	Confusing	7%	7%	7%	8%	9%	8%	8%	10%

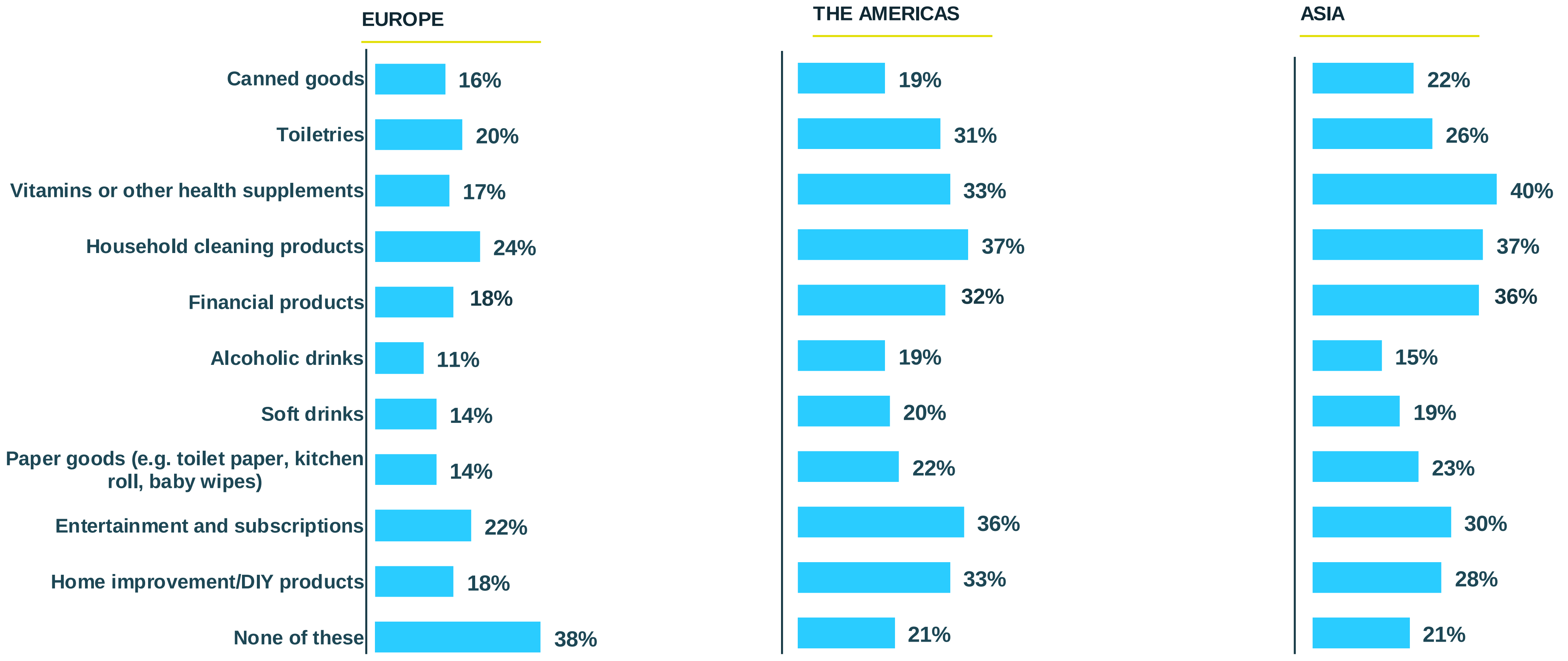
Expectations of spending this year compared to previous years – global overview

Household cleaning, personal care/hygiene products and healthcare continue to be the categories where people expect to spend more, while many non-essential purchases like holidays and cars are still expected to see less spend.



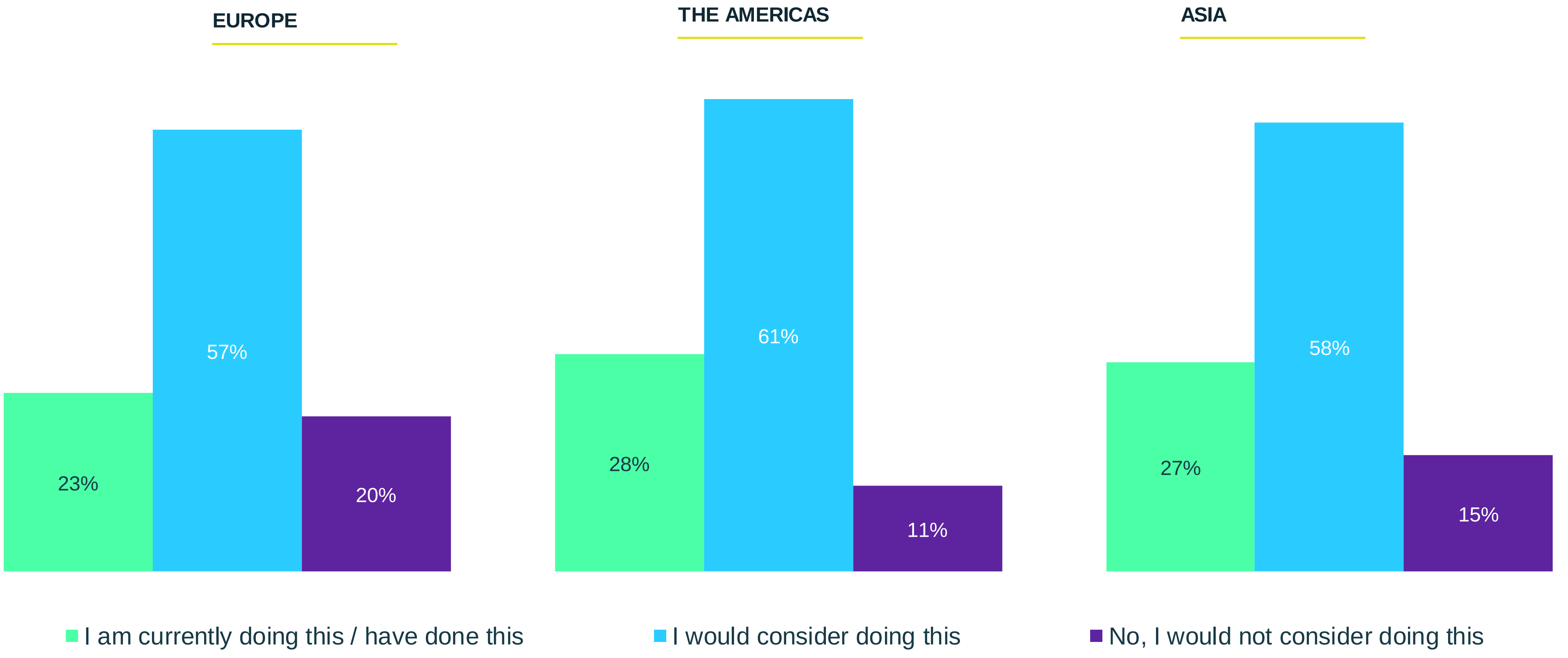
Areas consumers want to see brands offer new and different products

Globally, innovation within household cleaning products, financial products, entertainment/subscriptions, vitamins/health supplements and home improvement receive most interest, but there is less appetite within food and drink. Consumers in the Americas and Asia have a greater desire for innovation than those in Europe.



Consideration of buying products direct from the brand or manufacturer

The ideas of buying direct from brands is well received across all regions but highest in the Americas where 9 in 10 are either already doing this or would consider it.



Beauty

Beauty, hair and wellness routine SINCE Coronavirus

Consumers in Europe are less likely to have bought more products or new equipment to carry out their own beauty/hair treatments at home compared to those in the Americas and Asia, while those in Americas are more likely to have let their beauty/hair routine slip since the pandemic started.

	Europe	Americas	Asia
I have managed to maintain a comparable beauty/hair routine	19%	22%	24%
I have bought more products to carry out my own beauty/hair treatments at home	16%	25%	23%
I have let my beauty/hair routine slip	16%	27%	20%
My household and I have helped each other by performing in home beauty/hair treatments	16%	20%	21%
I have bought new equipment to carry out beauty/hair treatments myself at home	9%	14%	18%
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 personalized, flexible products and services as a result of the way things have changed recently	10%	12%	14%
None of these	33%	18%	24%

Beauty, hair and wellness routine FUTURE expectations

A high proportion of consumers globally are claiming they will continue their beauty/hair routine at home in the future, presenting a big opportunity for brands to service these needs but a worry to the brick and mortar industry if these claims prove true - concern around returning is greatest in the USA and Asia.

	Europe	Americas	Asia
I will continue with my beauty/hair routine at home	**21%**	**30%**	**26%**
I am very eager to get back to the beauticians, spa, hairdressers, nail bar etc	**22%**	**20%**	**24%**
I am worried about returning to my beauticians, spa, hairdressers, nail bar etc	**14%**	**19%**	**20%**
I am worried about beauticians closing and staff losing jobs if people like me don't go there	**19%**	**23%**	**16%**
I would like my beautician, spa, hairdressers, nail bar to offer more personalized, flexible products and services	**10%**	**12%**	**21%**
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%**
I have missed the social aspect of going to the beauticians, spa, hairdressers, nail bar	**9%**	**16%**	**14%**
None of these	**29%**	**21%**	**22%**

Consumer Finance

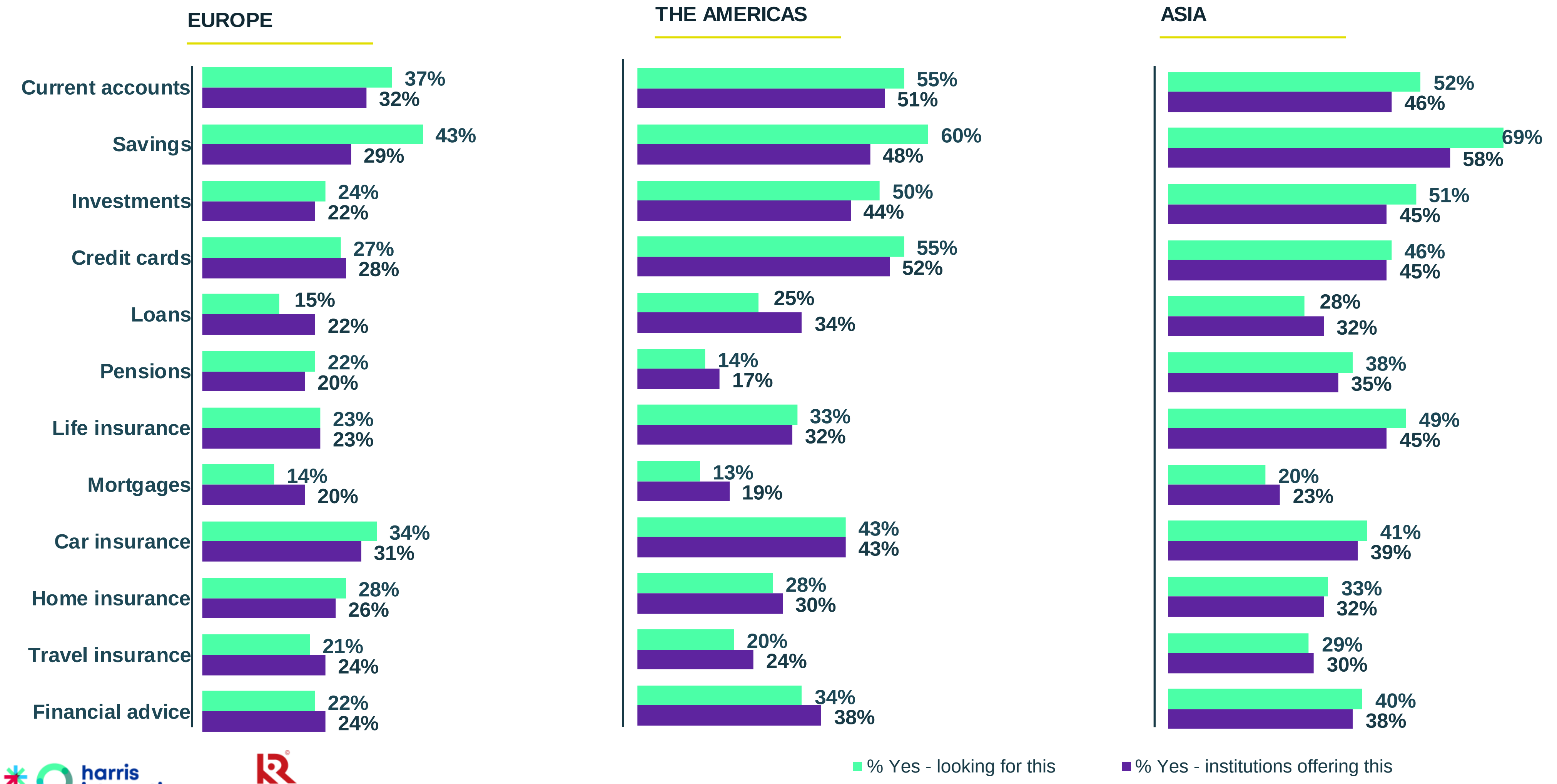
Consumers plans regarding financial products and services

Consumers in the Americas and Asia are more likely to review their finances after the recent changes, with savings and investments the most likely to be reviewed.

Areas consumers plan to review as a result of recent changes	Europe W9	Americas W9	Asia W9
Where I bank	**18%**	**21%**	**25%**
My insurance policies	**16%**	**15%**	**28%**
My savings	**36%**	**56%**	**58%**
My investments	**19%**	**37%**	**40%**
My pension provision	**11%**	**15%**	**15%**
None of these	**45%**	**26%**	**24%**

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

Across the globe, there is greatest disparity between what consumers are looking for and what institutions are providing for savings products, while there is felt to be more innovation for loans (including mortgages) than consumers deem necessary, particularly in Europe and Americas.



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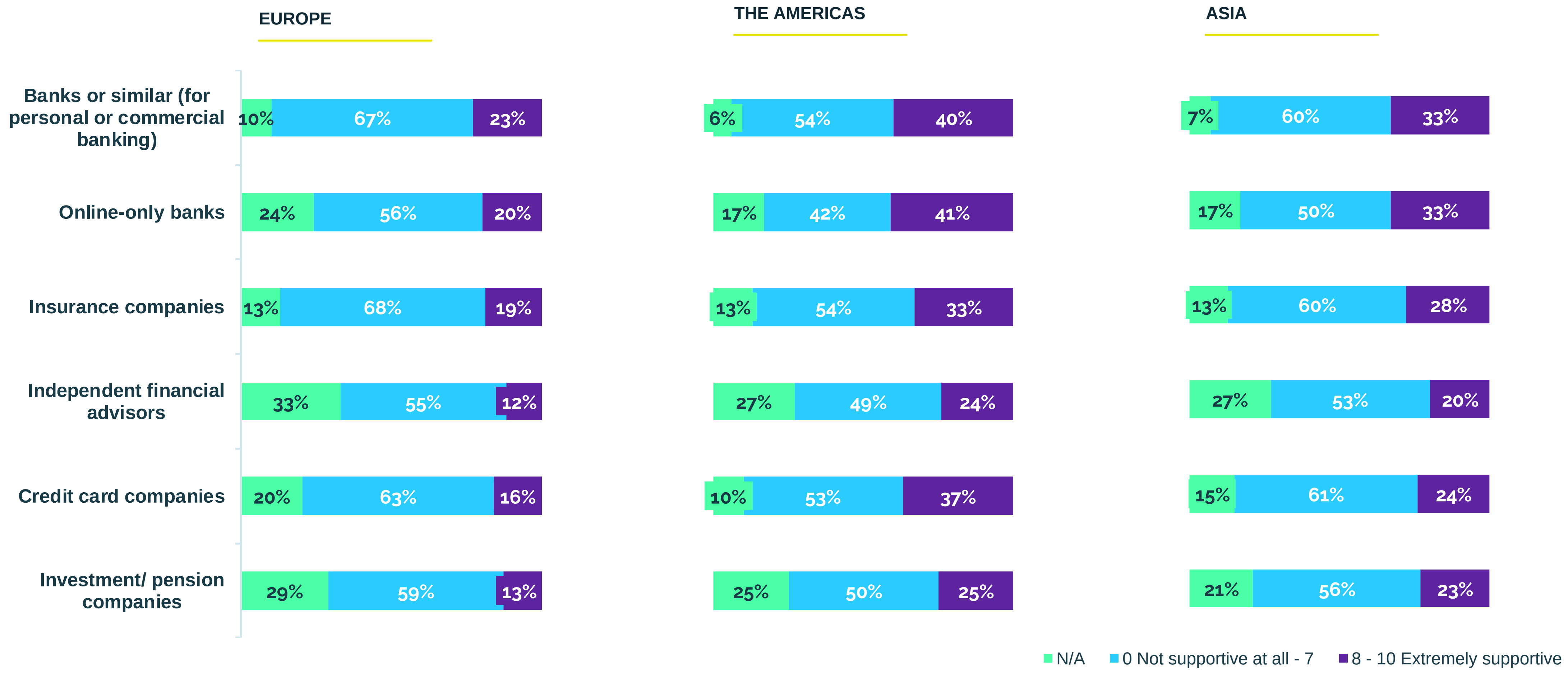
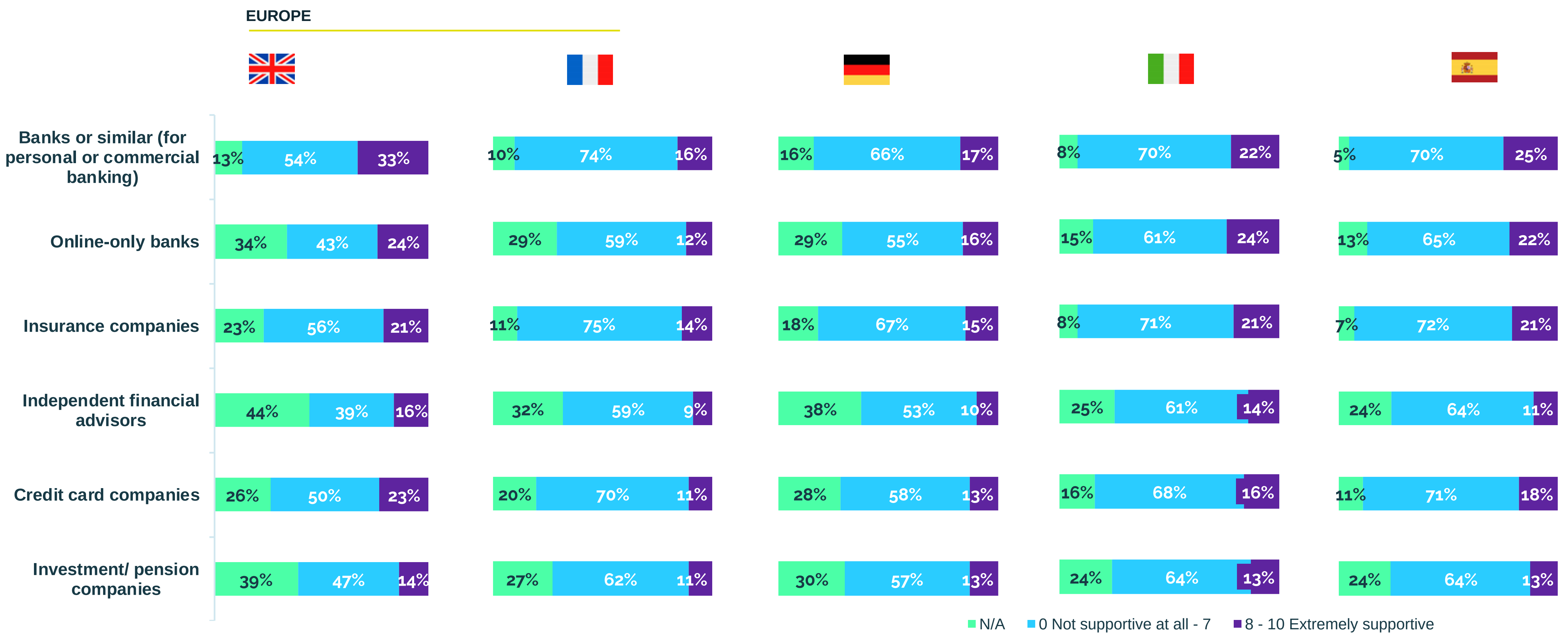
Supportiveness of financial institutions in helping consumers make changes

Financial institutions are perceived to be most supportive in the Americas and Asia. Banks and online-only banks are considered the most supportive across all regions, while in the Americas they are joined by credit card companies.



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

Within Europe, financial institutions are more supportive in the UK, particularly credit card companies which see less positivity in the other markets



	UK N/A	UK 0-7	UK 8-10	France N/A	France 0-7	France 8-10	Germany N/A	Germany 0-7	Germany 8-10	Italy N/A	Italy 0-7	Italy 8-10	Spain N/A	Spain 0-7	Spain 8-10
Banks or similar (for personal or commercial banking)	13%	54%	33%	10%	74%	16%	16%	66%	17%	8%	70%	22%	5%	70%	25%
Online-only banks	34%	43%	24%	29%	59%	12%	29%	55%	16%	15%	61%	24%	13%	65%	22%
Insurance companies	23%	56%	21%	11%	75%	14%	18%	67%	15%	8%	71%	21%	7%	72%	21%
Independent financial advisors	44%	39%	16%	32%	59%	9%	38%	53%	10%	25%	61%	14%	24%	64%	11%
Credit card companies	26%	50%	23%	20%	70%	11%	28%	58%	13%	16%	68%	16%	11%	71%	18%
Investment/ pension companies	39%	47%	14%	27%	62%	11%	30%	57%	13%	24%	64%	13%	24%	64%	13%

Behaviour towards charitable donations

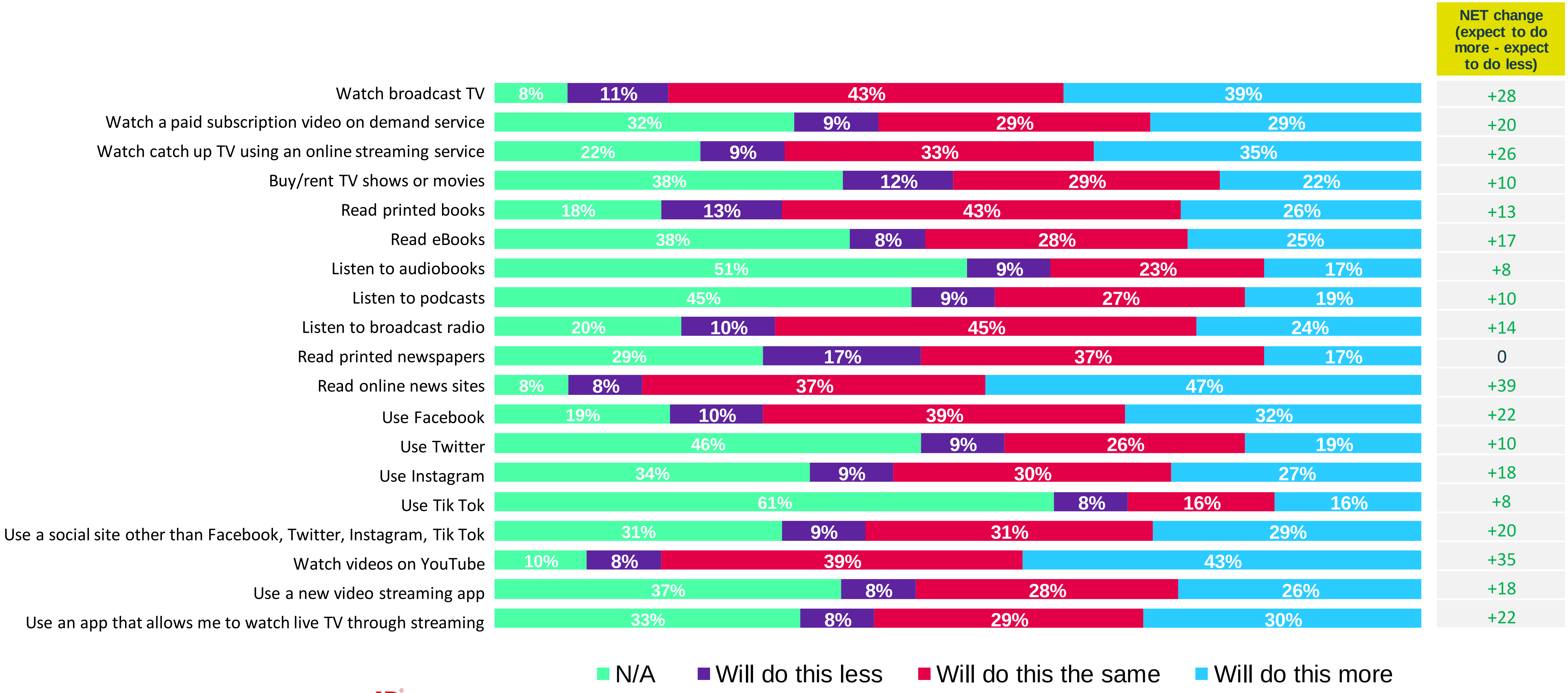
Consumers in Europe are least likely currently donate to charity, as well as being least likely to start after the pandemic dies down.

	Europe	Americas	Asia
	W9	W9	W9
I don't regularly donate to charity at the moment and I am unlikely to do so after coronavirus	50%	30%	32%
I don't regularly donate to charity at the moment, but I will start to do so after coronavirus	18%	28%	29%
I regularly donate to charity at the moment and I will continue to do so after coronavirus	28%	38%	33%
I regularly donate to charity at the moment, but I am unlikely to do so after coronavirus	4%	5%	6%

Entertainment & Media

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

Expected interaction with media/entertainment outlets continues to grow, with consumers most likely to read news online and watch YouTube videos more after the pandemic has passed.



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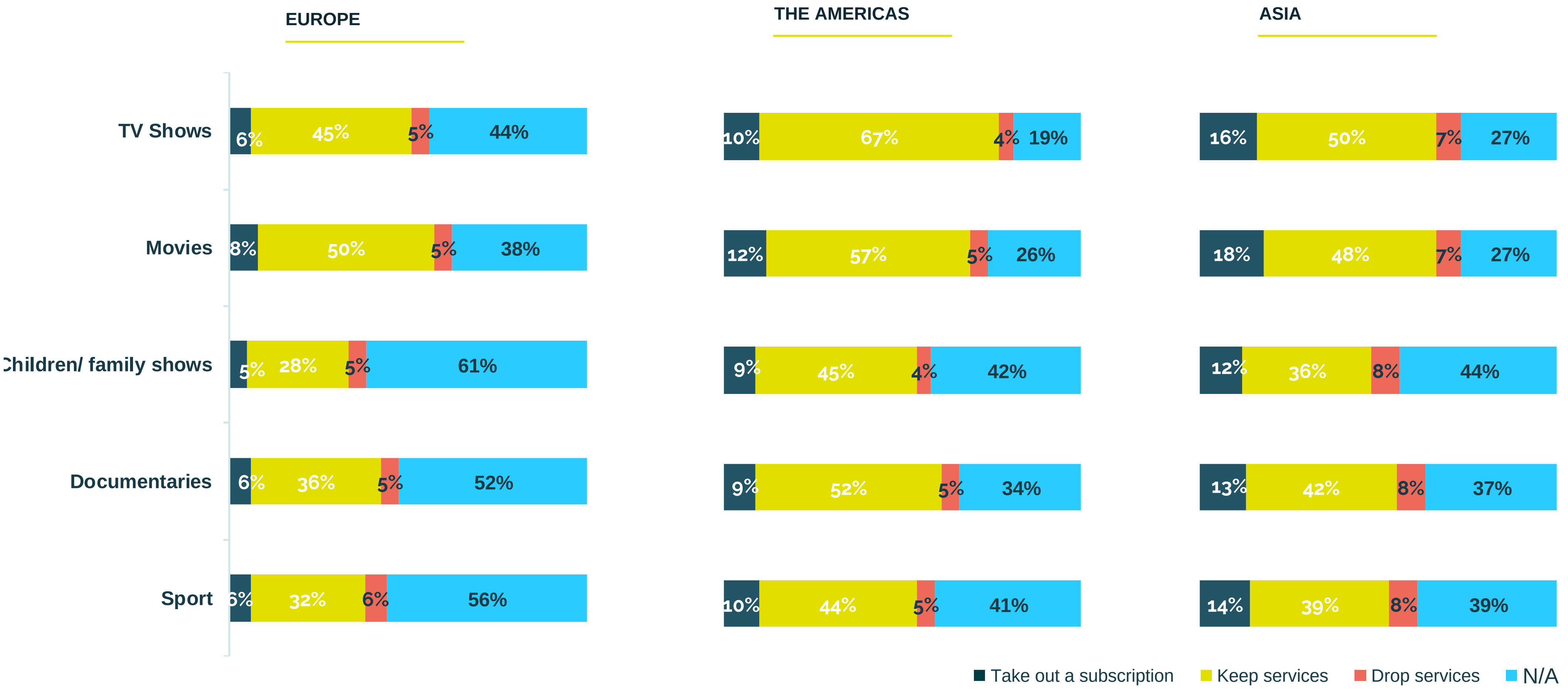
Will consumers keep subscriptions that were subscribed to during Covid-19?

Most consumers who have subscriptions intend to keep these services going forwards, while in the Americas and Asia total use of subscription services is likely to grow.



Expectations for playing/watching video games POST Covid-19

In Europe consumers expect to decrease the amount of time spent playing/watching video games across all platforms, however in the Americas and Asia mobile gaming is set to see greater usage.

	Europe	Americas	Asia
Playing on a video game console (e.g. PlayStation, Xbox, Switch)	-7	+5	0
Playing on a video game handheld device (e.g. DS, Vita)	-11	-5	-3
Playing on a PC/laptop via games embedded in a website	-11	-4	-3
Playing on a PC/laptop via a downloaded, streamed or physical game (not embedded in a website)	-8	0	+2
Playing on a mobile phone or tablet device	-5	+6	+12
Watching professional esports matches/leagues/tournaments online or live in-person	-14	-5	-4
Watching professional esports matches/leagues/tournaments on TV	-14	-5	-3
Watching people play video games online	-16	-9	-4

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

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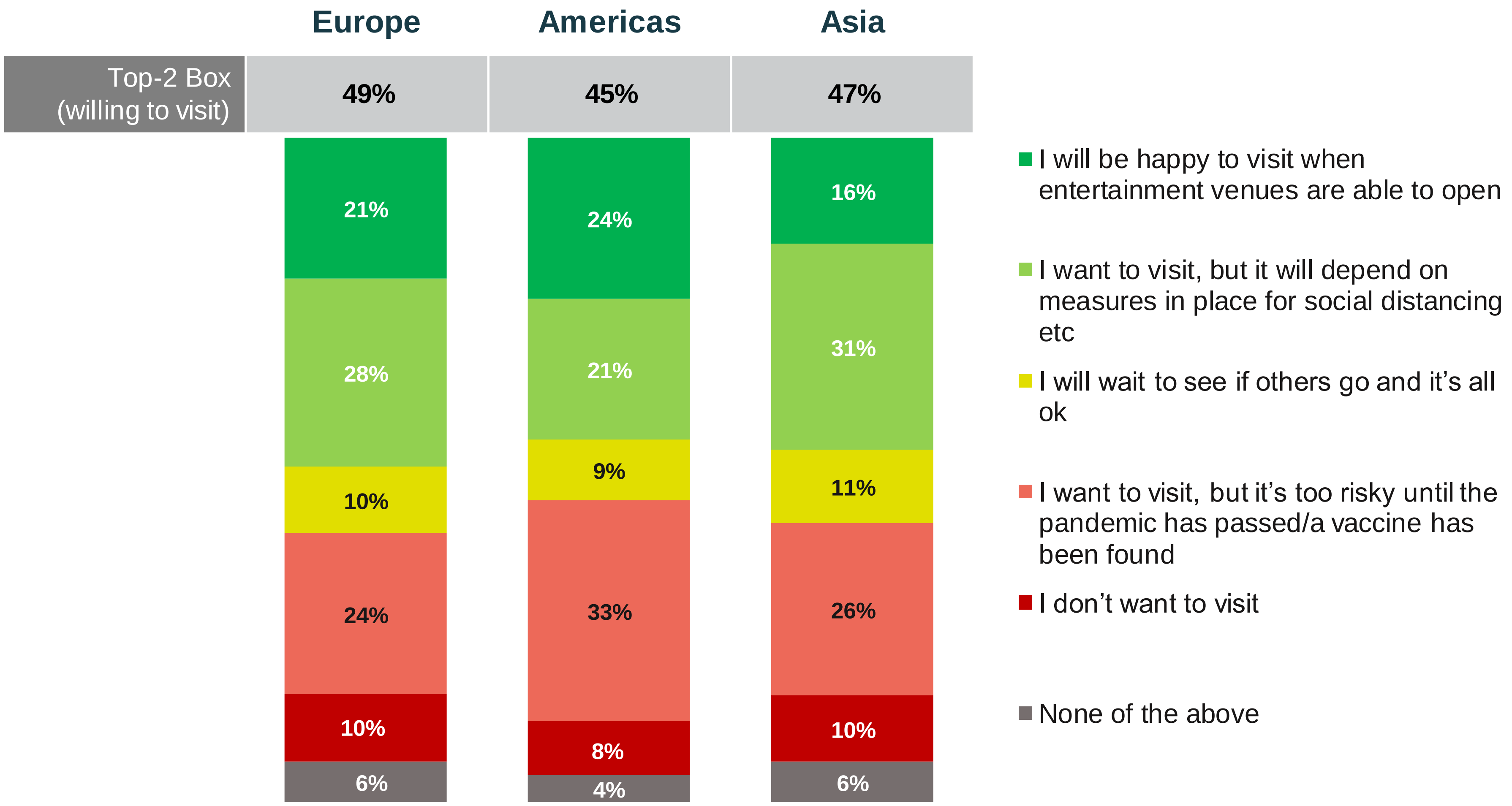
Events / venues visited regularly before Covid-19

Restaurants and cinemas were the two most popular entertainment venues visited before Covid-19 across all three regions, particularly in the Americas. Visiting pubs/bars/clubs was less popular in Asia.

	Europe	Americas	Asia
Restaurants	**74%**	**83%**	**76%**
Cinemas/movie theatres	**57%**	**66%**	**60%**
Pubs/bars/clubs	**46%**	**45%**	**29%**
Live music events (e.g. concerts, gigs, festivals)	**32%**	**43%**	**31%**
Live shows e.g. plays and musicals	**29%**	**37%**	**25%**
Live sports events (e.g. rugby, football, tennis, cricket)	**23%**	**31%**	**26%**
Casinos	**7%**	**13%**	**7%**
None of these	**13%**	**7%**	**12%**

Likelihood of visiting entertainment venues when they re-open

Overall, almost half of all consumers across the three regions will be willing to visit entertainment venues when they will reopen, but those in Europe and Asia will depend more on the social distancing measures put in place than those in the Americas.



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

Limiting numbers and hand sanitiser/masks provided continue to be the top two measures across all regions that would encourage consumers to visit. Temperature checks & bringing your own food and drink will be less persuasive in Europe, while outdoor only areas will not convince as many people in Asia.

	Europe	Americas	Asia
Limited numbers allowing social distancing	44%	55%	39%
Hand sanitiser and masks provided	44%	57%	45%
Temperature checks prior to allowing people into the venue (to check for fever)	32%	48%	37%
Perspex screens between people (where possible)	24%	34%	24%
Bring your own food and drink	2%	16%	18%
Outdoor areas only	40%	42%	20%
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