

Understanding the 2020 consumer

Wave 10 Global Barometer Study

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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 to better understand consumer changes as they happen.



Sentiment tracker

As the COVID-19 pandemic continues, consumers satisfaction with life has begun to level out, with just a third who are satisfied

Concern around personal finances and job security is still high

- Almost half of consumers globally consider themselves less well off now than before the COVID-19 pandemic
- Less than 1 in 5 are confident spending money given the situation

Consumers plan to think more carefully about what they spend money on as a result

Shopping channels

Consumers globally have visited stores in person *less* as a result of the COVID-19 pandemic

Few are confident shopping in-store at the moment

- Consumers expect to shop in-store less over the coming weeks, particularly retail shops (clothing and gift)

Categories consumers prefer to buy online include technology, clothing, and cosmetics, beauty and fragrance

48% globally expect the COVID-19 pandemic to influence how they shop in the future

Wave 10: Markets studied and field schedule

Fieldwork took place between
10th – 15th September 2020

- Data has been weighted by age, gender and region to be Census representative in all markets (except UAE where regions are not weighted)
- In France, data is also weighted to reflect social grade

Market		Completed Interviews
	UK	1,114
	France	1,051
	Germany	1,055
	Italy	1,127
	Spain	1,127
	US	1,082
	Brazil	1,124
	Australia	1,079
	Singapore	535
	Japan	1,140
	Korea	1,118
	China	1,120
	Hong Kong	552
	UAE	534

Sentiment Tracker



1/3 of Consumers Feel Satisfied with their Lives

Despite a substantial increase in levels of satisfaction compared to March, as the COVID-19 pandemic continues just a third of consumers have felt satisfied with their life over the last 2 weeks.

Satisfaction scores have begun to level out however, remaining relatively consistent now with the previous wave.

33%

globally have felt satisfied with their life over the last 2 weeks

44%

felt satisfied in the Americas, where satisfaction levels are highest

-2

overall compared to the previous wave

Although concern is still high about a second wave of COVID-19, levels of concern have dropped globally compared to the previous wave

51%

are very concerned about a second wave of COVID-19

-8

overall compared to the previous wave

34%

**of people are concerned
about their personal
financial security with
regards to the pandemic**

	EUROPE	THE AMERICAS	ASIA
	28%	47%	35%
Vs W1	-10%	-9%	-12%

We continue to see a decrease in the levels of those who are very concerned about their personal financial security since March.

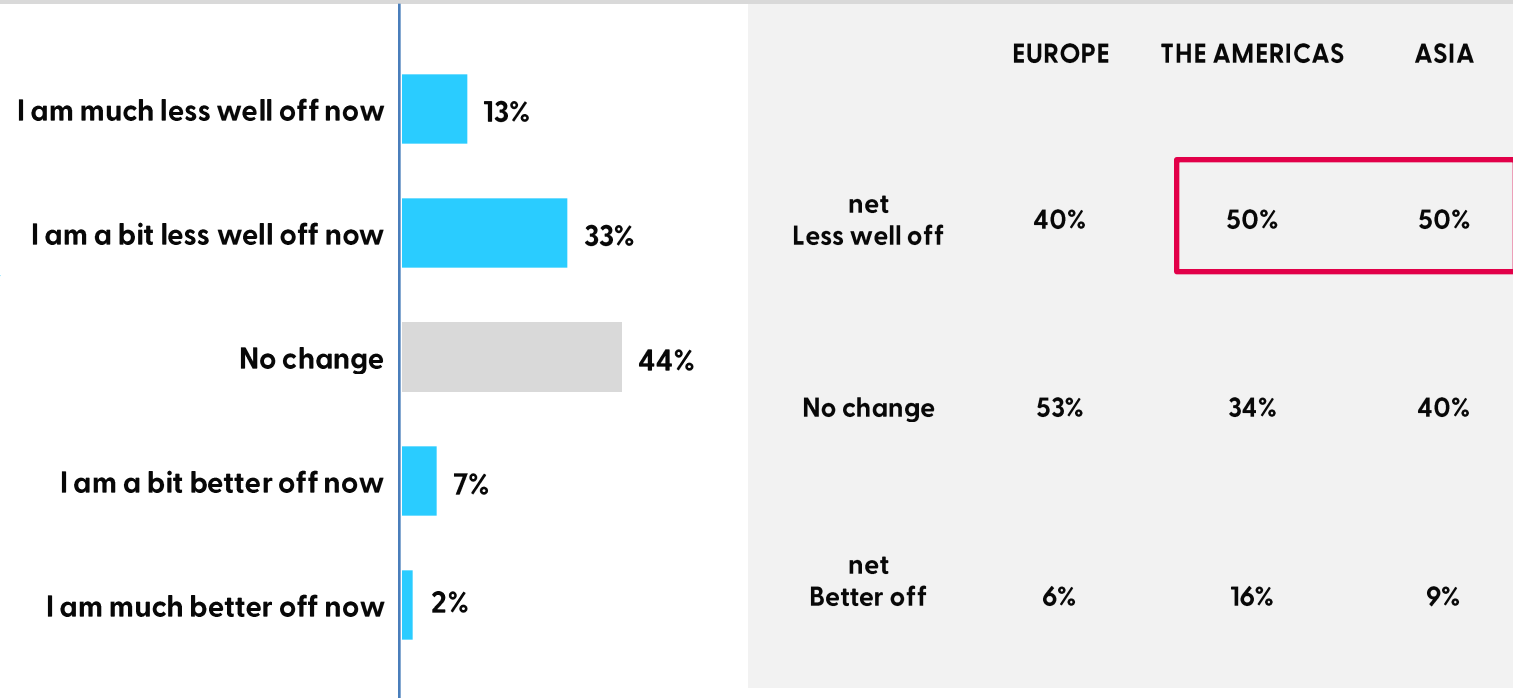
However, some consumers are still concerned about finances, particularly in the Americas and Asia.



46%

of people are less well off compared to before the pandemic

Consumers in the Americas and Asia more likely to have been negatively impacted financially





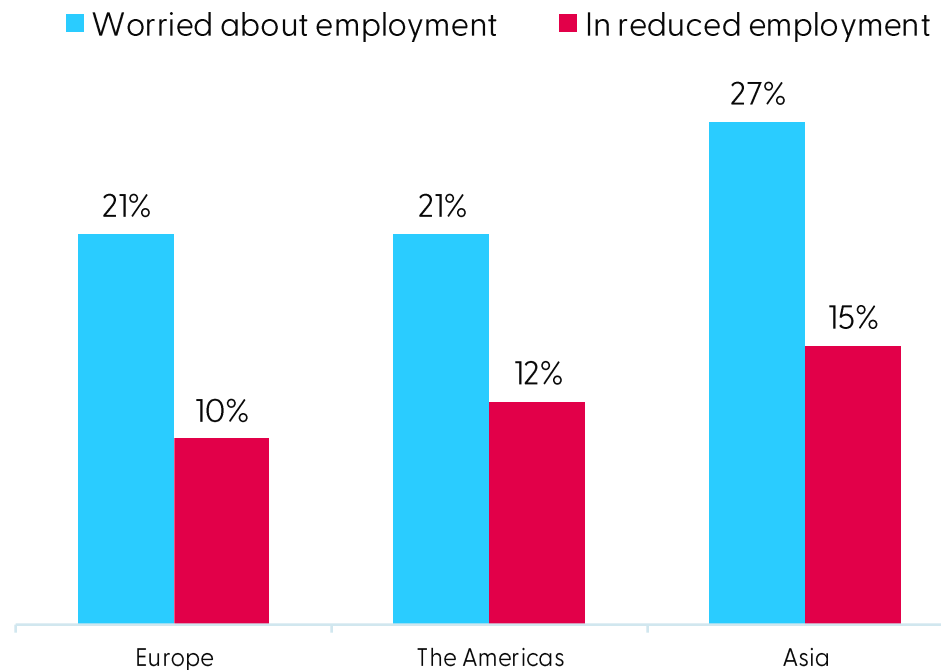
Current job security continues to be a concern across the globe – particularly in Asia

24%

feel worried about their
employment

-2

overall compared to the
previous wave



18%

globally are confident
spending money over the
coming months due to the
pandemic

41%

plan to think more
carefully about what
they spend money on



Consumers priorities as restrictions ease...

- Going out to eat continues to be a priority as well as returning to the hairdressers/ salon
- Consumers are eager to shop both in store and online
- Eating more healthy food and being more environmentally conscious are also expected by many

Activities likely to undertake in the next 1-2 months



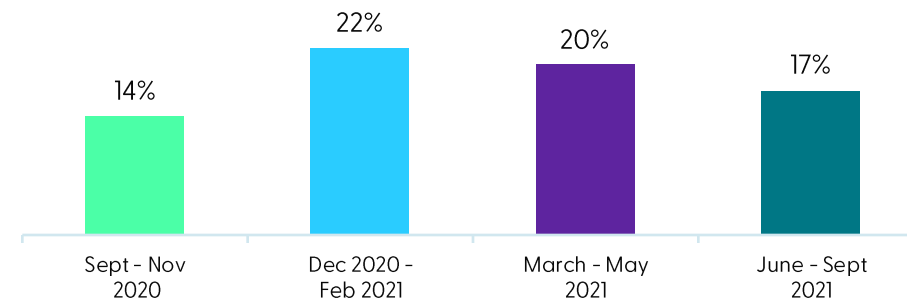


Consumers are more comfortable booking an event sooner, however for foreign holidays, many prefer to wait until Summer 2021

72%

would be comfortable booking a holiday abroad within the next year

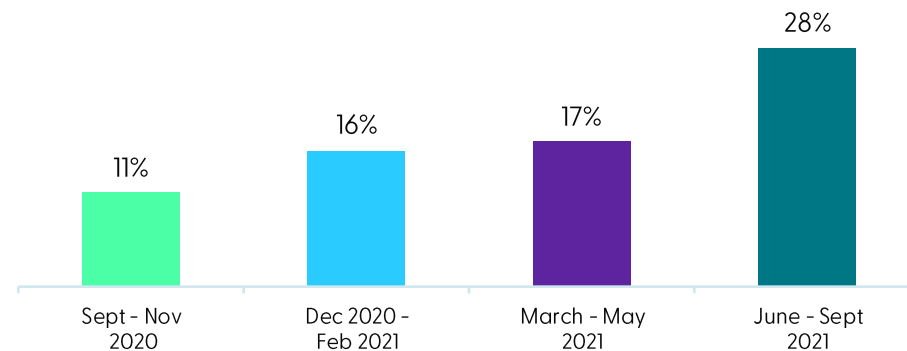
Event taking place in...



would not be comfortable with any of these months

27%

Holiday taking place in...



29%

Shopping Channels

In store vs. Online

Over recent months, as we might expect, consumers globally have been visiting physical stores in-person *less* than before the pandemic

49%

have visited stores in person a bit less or much less than before the pandemic

17%

have visited stores in person a bit more or much more than before the pandemic

62%

in the Americas have visited stores less – the impact is highest in Brazil (77%)

34%

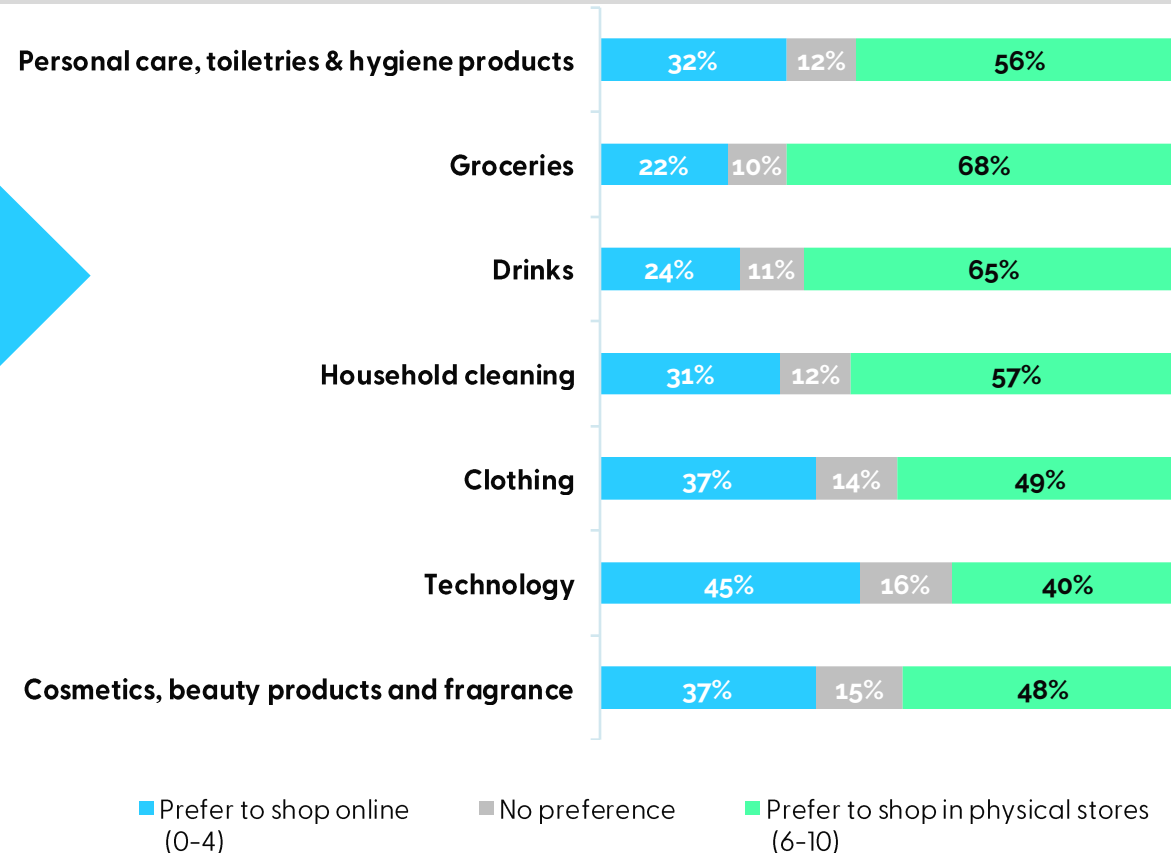
globally feel confident
about shopping at stores
in person right now





Preferences on shopping channel differ by category

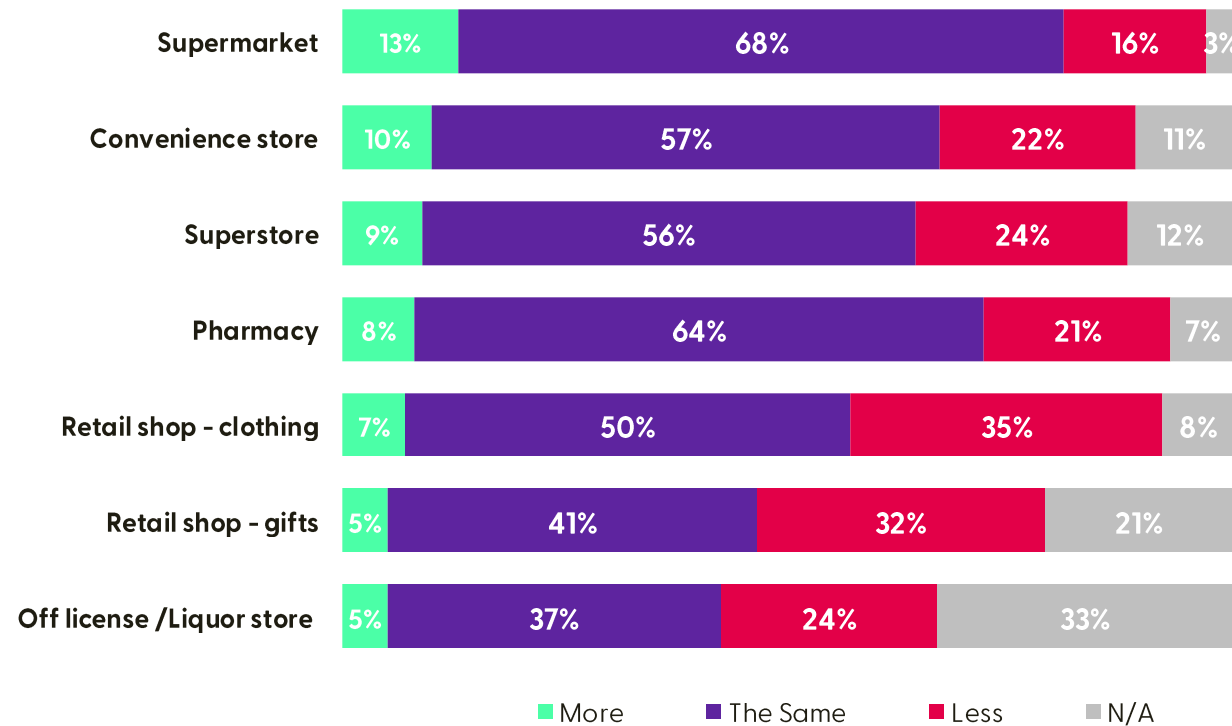
Despite the pandemic, shopping in-store is still generally preferred, although consumers are more likely to want to purchase technology, clothing and cosmetics, beauty and fragrance online





Expectations around shopping in-store in future differ by store type

Consumers expect to shop in-store less over the coming weeks for all store types, particularly retail shops (clothing and gift)—supermarkets see the least change





Many consumers expect their online shopping habits to return to how they were before the COVID-19 pandemic, however, some anticipate shopping habits changing given the impact the pandemic has had in recent months

I'll shop online for this...



48%

globally expect that the
COVID-19 pandemic will
influence how they shop in
the future

The markets most likely to
expect their shopping habits to
be impacted going forwards are:



Korea 64%



UAE 64%



Brazil 60%

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