

GWI

**Coronavirus Research** | April 2020

Series 6: Consumer Spending

# Contents

|   |    |
|---|----|
| INTRODUCTION.....                               | 3  |
| KEY INSIGHTS.....                               | 4  |
| CHANGING GROCERY PURCHASES: SPEND.....          | 7  |
| CHANGING GROCERY PURCHASES: ITEMS.....          | 8  |
| CHANGING GROCERY PURCHASES: ITEMS.....          | 9  |
| ATTITUDES TOWARD GROCERY PURCHASING.....        | 10 |
| ATTITUDES TOWARD SELF-CARE DURING OUTBREAK..... | 11 |
| RECENT ONLINE PURCHASES.....                    | 12 |
| BRAND DISCOVERY DURING THE OUTBREAK.....        | 13 |
| BRAND DISCOVERY DURING THE OUTBREAK.....        | 14 |
| PERSONAL PRIORITIES DURING THE OUTBREAK.....    | 15 |
| PERSONAL PRIORITIES DURING THE OUTBREAK.....    | 16 |
| PURCHASE PRIORITIES POST-OUTBREAK.....          | 17 |
| EXPECTATION FROM RETAILERS.....                 | 18 |
| EFFECT OF OUTBREAK ON HOUSEHOLD EARNINGS.....   | 19 |
| ANTICIPATED RECOVERY: GLOBAL ECONOMY.....       | 20 |
| ANTICIPATED RECOVERY: LOCAL ECONOMY.....        | 21 |
| ANTICIPATED RECOVERY: PERSONAL FINANCES.....    | 22 |
| DESTINATION TRAVEL POST-OUTBREAK.....           | 23 |
| DESTINATION TRAVEL POST-OUTBREAK.....           | 24 |

# Introduction

As the coronavirus outbreak continues, more and more communities, industries, and businesses are feeling its effects. Staying informed at this time is crucial.

At GlobalWebIndex, we're tracking these effects across different sectors through a focused content series. In this whitepaper, we're releasing our sixth dataset in the series, collected between April 2-6 in the U.S. and UK, dedicated to consumer economic confidence.

In this research we explore how consumers' shopping habits have changed during the outbreak of coronavirus. We dig deeper into what types of goods they are purchasing more or less of, what purchases they are delaying, how secure they feel within their own financial situation, and what sorts of expectations they have of retailers at this time of crisis.

We'll be following this with further releases, exploring the impact of coronavirus on work behaviors, healthcare, and other topics still in development.

NOTE: All stats in this report are from a GlobalWebIndex April 2020 custom survey among 2,004 (U.S.) and 1,538 (UK) internet users aged 16-64.

## Audience Definitions:

### Generations:

- **Gen Z** - 16-23 years-old
- **Gen Y (Millennials)** - 24-37 years-old
- **Gen X** - 38-56 years-old
- **Baby boomers** - 57-64 years-old

### Income (based on annual household income):

- **Lower income (U.S.)** - \$32,000 or less
- **Higher income (U.S.)** - \$85,000 or more
  
- **Lower income (UK)** - £24,000 or less
- **Higher income (UK)** - £60,000 or more

### Spending segments:

- **Price-conscious** - I always try to find the best deals for products that I want to buy AND I budget my spending
- **Impulse buyers** - I like to have the latest products OR I often make impulsive purchases AND I tend to buy brands I see advertised
- **Savers** - I'm proactive about investing money AND I make sure I save money each month

# Key Insights

## Grocery spending is on the rise

- 49% in the U.S. and UK have increased their spending on their grocery shop since the outbreak, though 20% have spent less and 31% are paying about the same.
- This is not consistent across all audiences. While price-conscious consumers are spending less, self-defined savers are spending more - even more than impulse buyers, in fact. It could be that this stockpiling buying is thought of as a kind of investment.
- By country and demographic, the pattern is roughly similar, though baby boomers are markedly more likely to continue as normal in their grocery shop, with 45% saying the amount they spend hasn't changed.
- Higher-income consumers are slightly more likely to be increasing their spend on their grocery shops compared to lower earners (57% vs. 51%, respectively), but it's likely that the value of these spending increases among top earners is higher. Men (53%) are also slightly more likely than women (45%) to be doing so.

## Cleaning products, toilet paper, and non-perishable goods are the priority buys - in that order

- Personal and household cleaning products are the purchases with the biggest increase, though this is skewed by the U.S. The lack of a federal lockdown may have given U.S. consumers more opportunity to stock up on them, while UK consumers have increased purchases of shelf-stable products like pasta and rice (33%).
- Compared to other generations, boomers have taken a much leaner approach to their household spending during the crisis, focusing their purchase increases on personal toiletries, non-perishable food and cleaning products.
- Stocking up hasn't meant abandoning fresh food, as all generations in both countries are more likely to have bought more perishable items than any non-perishable. Snack foods are still a significant part of the shopping cart as well.
- Gen Z and millennials are more likely to be stocking up on frozen foods than canned, while the reverse is true for Gen X and baby boomers.
- Stocking up on bottled water seems to be a U.S. phenomenon, where 34% are buying more, compared to 14% in the UK.
- The picture is relatively even across income groups. However, higher income earners are most likely to buy more fresh food (50% vs. 39%), while lower earners are more likely to be buying more canned and frozen items.
- Impulse buyers are in the lead for buying almost all products except for canned goods, which are a more prominent choice by price-conscious consumers.

## Bigger baskets, fewer visits

- Buying a larger quantity of grocery items in one go during the crisis may be due to the fact that over half of them actively want to limit the amount of times they have to go to the store. Big and infrequent shops seem to be the new default mode.
- They are also genuinely fearful about supplies - 35% are worried they will run out of food and other essentials.
- The crisis will likely do a lot for increasing awareness and adoption of online grocery shopping, especially for older consumers who have not been the typical demographic for these types of services. 30% say they try to order online as much as possible - an effort led by 37% of Gen Xs and 24% of baby boomers.
- Older internet users are more likely to worry about the availability of items, with over half of Gen X and baby boomers thinking that compared to 31% of Gen Z. Having less responsibility for the food shop could be a reason why Gen Z are less concerned.
- Treat purchases aren't really part of the picture at the moment, as only 14% currently say they want to treat themselves. Even among impulse buyers just over a fifth are purchasing treats for themselves.

### **Simple, reliable forms of self-care dominate despite many resources available**

- Above all, family interaction is what most are concentrating on during the crisis, with 49% saying that spending more quality time with their household is what they're doing as a form of self-care.
- There are interesting variations in exercise by demographic. Boomers lead for walking (36%), while Gen Z favor strength and flexibility practices like yoga or Pilates. Millennials lead all other generations for meditating or doing app-based home workouts. As might be expected, exercising outdoors is further down the list.
- Gen Z are most likely to use the crisis to teach themselves something new, with 30% doing so.
- Exercising habits show sharp differences by income and spending propensity. Higher earners and impulse buyers are much more likely to be doing home workouts with an app, whereas the more price-conscious segment are taking the cheaper options of going for walks, meditating, or exercising outdoors.

### **Convenience often triumphs over health or financial benefits when it comes to deliveries**

- The coronavirus outbreak is pushing behaviors online, albeit at different speeds. For obvious reasons, food related purchases have seen the biggest purchasing rates online in the past week, especially among millennials. In fact, millennials display a much stronger reliance on using online channels to make food purchases than other generations; whether that's takeout deliveries (36%), grocery shops (35%) or meal subscription services (10%).
- Millennials also demonstrate their love of entertainment, as they are most likely to have bought an entertainment subscription, a video game, or consumer electronics online.
- Gen Z are still keen on fashion, with 21% buying clothing or shoes online in the past week.
- As might be expected, buying products online attracts more impulse buyers, and they are ahead in every category. Takeout/takeaway is one of the few items that is relatively equal across income groups and buying propensity. Online groceries are noticeably split by income levels - a possible result of delivery fees that accompany online grocery orders.

### **Brand discovery reflects our changing media habits while in lockdown**

- Although it's a familiar group of brand discovery sources topping the list during the outbreak, the reshuffling of the ranking of these sources does reflect the fact that spikes in media consumption and changes in media habits are having an appreciable effect on how people are finding new products and services.
- As we have detailed in previous waves, digital media usage (mainly on mobile) and TV viewing time is increasing with widespread lockdowns, so it's no surprise that discovering brands through ads seen on social media, TV, and websites lead here.
- Recommendations for social media are neck-and-neck with offline recommendations (both 23%). Unlike what we tend to find in our quarterly syndicated research, word-of-mouth recommendations are most popular among millennials. A surge in messaging and virtual communication may be creating new patterns here.
- It should be noted how low baby boomers are across the board for any form of brand discovery. This tallies with our wider COVID-19 research which shows that boomers are less inclined to be in favor of brands running "normal" advertising campaigns during the crisis.
- The rate of those discovering new brands and products during the crisis is much higher in the U.S. than the UK. Higher earners are also more likely to be discovering new brands on almost all sources.
- Millennials are also still influenced by personalization in product recommendations, more so than any other cohort, at this time.

### **Consumer priorities reflect a "mind over matter" attitude**

- Above all, consumers are making a positive mindset their main priority for the next month (59%). Following that is ensuring that they have necessary items (52%), and then maintaining relationships with friends and family (48%).
- For millennials and Gen X, maintaining positive mental health is also a big priority. For millennials, it's even more important than having necessary household goods.
- Gen Z appear to be somewhat insulated from the harsh side-effects of the crisis, as fewer of them are concerned with having necessary items, paying household bills, or staying informed on new developments.

- While practicalities are most important, entertainment and productivity are not far behind, with 46% of all respondents saying these are a priority for them.
- There are some differences by gender. Men are more concerned about maintaining fitness and productivity at work, while women make buying necessary items and paying household bills more of a priority.
- Cutting the data by income shows that staying positive is more important to lower earners (61%) than those in the higher income group (49%). The latter put more value on ensuring they remain fit and healthy (53%), and using their spare time productively (59%). The crisis doesn't seem to have alleviated work-related pressure in that respect.
- Paying household bills is, perhaps surprisingly, of almost equal concern to the lower income group (42%) as well as the higher (40%).

#### **Younger groups are most likely to be eyeing up post-crisis purchases, and domestic vacations are top of the list**

- There's currently a fairly modest level of intent in making big-ticket purchases once the crisis is over. 31% aren't currently prioritizing any purchase, and 14% are yet to make their mind up in this respect. But this is heavily influenced by age – the older you are, the less likely you are to be planning these purchases for after the outbreak.
- Domestic vacations are more popular than foreign ones. The fact that domestic trips lead for all demographics and income groups demonstrates the acute wariness over international travel which is unlikely to disappear soon, even following the outbreak.
- The disruption endured by the travel market has helped put insurance on top of the agenda, as 17% are making it a priority purchase, rising to 26% of millennials. But these figures are heavily skewed to the U.S., where insurance intent post-crisis is 3x above that seen in the UK (19% vs. 6%, respectively).
- Millennials and men are the most likely to be planning big-ticket purchases after the crisis.
- Uniquely among our defined spending segments, impulse buyers are the only group looking more at technology devices (29%) than future travel. Even if appetite for travel is low, there may be a group of consumers looking to invest in homes they have had to spend more time in, with home and furniture items also a popular choice.
- More cautious segments – savers, price-conscious and lower income respondents – are understandably more interested in insurance, but impulse buyers top other personas at 44% planning to purchase.
- When it comes to what consumers are expecting from retailers at this time, the community-focused, rather than individualistic, concerns rise to the top. These include enforcing social distancing within stores (58%), providing specialized hours for vulnerable people to shop (54%), and prioritizing deliveries of essential products (49%).
- Older consumers are especially more community-minded, with 60% of boomers wanting retailers to limit the number of items individual customers can buy, compared with 43% of millennials and only 36% of Gen Zs.

#### **As is typical, consumers have a more positive outlook on their personal outcomes vs. macro outcomes**

- Nearly half (44%) of consumers report that the crisis has had an effect on their households' earning ability. This is substantially higher in the U.S., where 46% of consumers, compared to 35% of UK consumers, report this to be the case, and it may be influenced by stronger protections by the government in the UK to support workers and businesses during this time.
- Higher income people (36%) in both markets are the least likely to say their income is being affected, as they are likely in more secure labor positions. Millennials are the generation most concerned about this, and as many are nearing their most powerful career progression years, this may have longer term effects, similar to the aftereffects of the recession in 2008.
- Most consumers see the global view as being worse than their personal view. 58% of internet users across both markets think that the global economy will be slow to recover from the crisis, compared to 51% who feel that their own country's economy will be slow to recover, and only 34% who feel the same about their own personal finances.
- Compared to those in the U.S., consumers in the UK take on a much more pessimistic view of the recovery prospects of both the global economy and their own country's economy. But expectations on the speed of recovery in relation to their personal finances remain fairly similar in both countries.
- Concern for both the local and global economies also increases for people with age, and boomers are among the most concerned.
- When it comes to personal finances, however, boomers are among the least concerned, while there is a generally equitable sense among the other generations.

## Changing grocery purchases: spend

**% who say that, since the outbreak, they are spending the following on their grocery shop**

|                          | All %     | U.S. %    | UK %      | Gen Z %   | Millennials % | Gen X %   | Boomers % |
|--------------------------|-----------|-----------|-----------|-----------|---------------|-----------|-----------|
| A lot more               | 11        | 12        | 9         | 13        | 13            | 10        | 10        |
| A little more            | 38        | 39        | 34        | 37        | 39            | 41        | 27        |
| About the same as before | 31        | 30        | 35        | 23        | 29            | 31        | 45        |
| A little less            | 14        | 14        | 14        | 18        | 15            | 13        | 10        |
| A lot less               | 6         | 6         | 7         | 9         | 5             | 5         | 8         |
| <b>NET more</b>          | <b>49</b> | <b>51</b> | <b>43</b> | <b>50</b> | <b>52</b>     | <b>51</b> | <b>37</b> |
| <b>NET less</b>          | <b>20</b> | <b>20</b> | <b>21</b> | <b>27</b> | <b>20</b>     | <b>18</b> | <b>18</b> |

|                          | Male %    | Female %  | Lower Income % | Higher Income % | Price-Conscious % | Impulse Buyers % | Savers %  |
|--------------------------|-----------|-----------|----------------|-----------------|-------------------|------------------|-----------|
| A lot more               | 11        | 12        | 12             | 11              | 12                | 14               | 11        |
| A little more            | 42        | 33        | 39             | 46              | 40                | 41               | 52        |
| About the same as before | 29        | 33        | 28             | 28              | 30                | 31               | 26        |
| A little less            | 13        | 15        | 13             | 12              | 13                | 12               | 9         |
| A lot less               | 5         | 7         | 7              | 3               | 6                 | 2                | 2         |
| <b>NET more</b>          | <b>53</b> | <b>45</b> | <b>51</b>      | <b>57</b>       | <b>52</b>         | <b>55</b>        | <b>63</b> |
| <b>NET less</b>          | <b>18</b> | <b>22</b> | <b>20</b>      | <b>15</b>       | <b>19</b>         | <b>14</b>        | <b>11</b> |

Question: Since the outbreak of coronavirus, are you spending more, less, or the same amount of money on your regular grocery shop?

## Changing grocery purchases: items

### % who say they're purchasing more of the following grocery products since the outbreak

|  | All<br>% | U.S.<br>% | UK<br>% | Gen Z<br>% | Millennials<br>% | Gen X<br>% | Boomers<br>% |
|--|----------|-----------|---------|------------|------------------|------------|--------------|
| Personal hygiene products (e.g. hand wash)                       | 49       | 53        | 32      | 52         | 54               | 50         | 33           |
| Household cleaning products (e.g. cleaning spray, bleach)        | 49       | 53        | 29      | 41         | 52               | 52         | 39           |
| Shelf-stable products (e.g. pasta, rice, flour)                  | 45       | 48        | 33      | 42         | 48               | 45         | 40           |
| Personal toiletries (e.g. toilet paper)                          | 44       | 48        | 27      | 39         | 49               | 44         | 42           |
| Fresh food/perishable items (e.g. dairy, eggs, meat, vegetables) | 41       | 43        | 30      | 51         | 44               | 36         | 36           |
| Canned vegetables/meats  | 39       | 41        | 27      | 34         | 38               | 40         | 40           |
| Frozen vegetables/meats  | 35       | 36        | 29      | 40         | 36               | 32         | 33           |
| Snack foods (e.g. pretzels, chocolate)                           | 34       | 35        | 30      | 34         | 38               | 33         | 32           |
| Bottled water  | 34       | 39        | 14      | 29         | 40               | 37         | 23           |
| Other  | 7        | 7         | 3       | 7          | 8                | 5          | 8            |
| I'm not purchasing more items                                    | 15       | 13        | 29      | 10         | 10               | 20         | 25           |

Question: Which of the following categories of items, if any, are you purchasing more of since the outbreak of coronavirus?



## Changing grocery purchases: items

### % who say they're purchasing more of the following grocery products since the outbreak

|  | Male | Female | Lower<br>Income | Higher<br>Income | Price-<br>Conscious | Impulse<br>Buyers | Savers |
|--|------|--------|-----------------|------------------|---------------------|-------------------|--------|
|  | %    | %      | %               | %                | %                   | %                 | %      |
| Personal hygiene products (e.g. hand wash)                       | 52   | 47     | 51              | 50               | 55                  | 69                | 64     |
| Household cleaning products (e.g. cleaning spray, bleach)        | 51   | 46     | 47              | 51               | 57                  | 77                | 67     |
| Shelf-stable products (e.g. pasta, rice, flour)                  | 45   | 45     | 46              | 42               | 54                  | 57                | 57     |
| Personal toiletries (e.g. toilet paper)                          | 46   | 43     | 44              | 40               | 52                  | 65                | 59     |
| Fresh food/perishable items (e.g. dairy, eggs, meat, vegetables) | 43   | 40     | 39              | 50               | 39                  | 53                | 47     |
| Canned vegetables/meats  | 42   | 35     | 41              | 36               | 50                  | 46                | 48     |
| Frozen vegetables/meats  | 35   | 35     | 37              | 33               | 40                  | 49                | 43     |
| Snack foods (e.g. pretzels, chocolate)                           | 32   | 37     | 34              | 32               | 40                  | 54                | 36     |
| Bottled water  | 38   | 31     | 35              | 31               | 41                  | 54                | 45     |
| Other  | 7    | 6      | 9               | 4                | 9                   | 6                 | 8      |
| I'm not purchasing more items                                    | 12   | 19     | 16              | 12               | 14                  | 3                 | 8      |

Question: Which of the following categories of items, if any, are you purchasing more of since the outbreak of coronavirus?

# Attitudes toward grocery purchasing

## % who say these statements describe their attitudes toward buying grocery products

|   | All % | U.S. % | UK % | Gen Z % | Millennials % | Gen X % | Boomers % |
|---|-------|--------|------|---------|---------------|---------|-----------|
| I want to limit the amount of times I have to go to the grocery store | 54    | 53     | 55   | 51      | 54            | 55      | 52        |
| I'm worried about availability of items                               | 45    | 45     | 43   | 31      | 43            | 51      | 50        |
| I'm making use of deals/discounts available                           | 36    | 37     | 29   | 30      | 37            | 38      | 35        |
| I'm worried I'll run out of food and other essentials                 | 35    | 38     | 25   | 33      | 35            | 39      | 31        |
| I try to order online as much as possible                             | 30    | 32     | 21   | 18      | 30            | 37      | 24        |
| I'm anxious that I'll be stuck at home for a while                    | 27    | 25     | 33   | 24      | 28            | 25      | 31        |
| I have the money to spend on extra items                              | 16    | 17     | 13   | 10      | 19            | 18      | 13        |
| I want to treat myself  | 14    | 13     | 17   | 14      | 18            | 10      | 16        |
| Other   | 4     | 4      | 4    | 4       | 5             | 4       | 4         |
| I'm not sure  | 4     | 3      | 6    | 4       | 2             | 3       | 8         |

|   | Male % | Female % | Lower Income % | Higher Income % | Price-Conscious % | Impulse Buyers % | Savers % |
|---|--------|----------|----------------|-----------------|-------------------|------------------|----------|
| I want to limit the amount of times I have to go to the grocery store | 50     | 57       | 54             | 46              | 71                | 56               | 70       |
| I'm worried about availability of items                               | 43     | 47       | 44             | 39              | 62                | 48               | 46       |
| I'm making use of deals/discounts available                           | 35     | 36       | 36             | 32              | 52                | 48               | 46       |
| I'm worried I'll run out of food and other essentials                 | 35     | 36       | 37             | 36              | 45                | 44               | 41       |
| I try to order online as much as possible                             | 33     | 26       | 27             | 45              | 39                | 49               | 47       |
| I'm anxious that I'll be stuck at home for a while                    | 26     | 27       | 23             | 27              | 32                | 36               | 21       |
| I have the money to spend on extra items                              | 21     | 12       | 15             | 23              | 24                | 36               | 33       |
| I want to treat myself  | 15     | 12       | 12             | 15              | 19                | 22               | 15       |
| Other   | 4      | 4        | 6              | 2               | 5                 | 4                | 5        |
| I'm not sure  | 3      | 4        | 3              | 3               | 1                 | 1                | 1        |

Question: Which of the following best describe your attitude towards buying grocery items?

## Attitudes toward self-care during outbreak

### % who say they're taking the following actions to look after themselves during the outbreak

|   | All<br>% | U.S.<br>% | UK<br>% | Gen Z<br>% | Millennials<br>% | Gen X<br>% | Boomers<br>% |
|---|----------|-----------|---------|------------|------------------|------------|--------------|
| Having quality time with my household                           | 49       | 51        | 41      | 47         | 51               | 53         | 36           |
| Taking vitamins and supplements (e.g. multivitamins)            | 48       | 51        | 30      | 49         | 48               | 45         | 53           |
| Eating healthy foods  | 47       | 50        | 33      | 50         | 50               | 48         | 35           |
| Going for walks   | 27       | 24        | 41      | 16         | 24               | 30         | 36           |
| Strength, flexibility, breathing exercises (e.g. yoga, Pilates) | 26       | 28        | 19      | 32         | 29               | 25         | 13           |
| Doing home workouts using an app                                | 23       | 23        | 19      | 26         | 28               | 23         | 2            |
| Learning something new (e.g. language, instrument)              | 22       | 23        | 18      | 30         | 28               | 18         | 9            |
| Meditation  | 21       | 22        | 12      | 18         | 26               | 19         | 14           |
| Exercising outdoors (e.g. going for a jog)                      | 15       | 15        | 18      | 17         | 17               | 13         | 15           |
| Other   | 10       | 11        | 8       | 9          | 8                | 11         | 15           |
| None of the above   | 9        | 8         | 13      | 7          | 6                | 11         | 14           |

|   | Male<br>% | Female<br>% | Lower<br>Income<br>% | Higher<br>Income<br>% | Price-<br>Conscious<br>% | Impulse<br>Buyers<br>% | Savers<br>% |
|---|-----------|-------------|----------------------|-----------------------|--------------------------|------------------------|-------------|
| Having quality time with my household                           | 52        | 46          | 47                   | 58                    | 61                       | 68                     | 72          |
| Taking vitamins and supplements (e.g. multivitamins)            | 48        | 47          | 45                   | 46                    | 61                       | 70                     | 71          |
| Eating healthy foods  | 52        | 42          | 44                   | 53                    | 62                       | 66                     | 73          |
| Going for walks   | 24        | 29          | 22                   | 26                    | 35                       | 24                     | 24          |
| Strength, flexibility, breathing exercises (e.g. yoga, Pilates) | 28        | 25          | 25                   | 24                    | 40                       | 46                     | 43          |
| Doing home workouts using an app                                | 26        | 19          | 19                   | 29                    | 27                       | 50                     | 37          |
| Learning something new (e.g. language, instrument)              | 27        | 17          | 19                   | 17                    | 30                       | 50                     | 35          |
| Meditation  | 24        | 18          | 18                   | 19                    | 32                       | 36                     | 36          |
| Exercising outdoors (e.g. going for a jog)                      | 17        | 14          | 12                   | 19                    | 20                       | 18                     | 16          |
| Other   | 10        | 10          | 14                   | 6                     | 12                       | 4                      | 9           |
| None of the above   | 7         | 12          | 10                   | 6                     | 4                        | 2                      | 2           |

Question: Which of the following, if any, are you doing to look after yourself during the coronavirus outbreak?

## Recent online purchases

### % who report having purchased the following items online in the past week

|  | All<br>% | U.S.<br>% | UK<br>% | Gen Z<br>% | Millennials<br>% | Gen X<br>% | Boomers<br>% |
|--|----------|-----------|---------|------------|------------------|------------|--------------|
| Takeout/takeaway delivery  | 30       | 31        | 24      | 23         | 36               | 29         | 25           |
| Grocery delivery   | 29       | 30        | 22      | 19         | 35               | 30         | 22           |
| Entertainment subscription service (e.g. Netflix, Disney, Spotify) | 18       | 18        | 18      | 20         | 24               | 17         | 4            |
| Beauty/personal care items (e.g. skincare, makeup)                 | 16       | 17        | 13      | 12         | 17               | 19         | 12           |
| Clothing/shoes   | 15       | 16        | 13      | 21         | 16               | 14         | 10           |
| A book/audiobook   | 15       | 15        | 14      | 7          | 14               | 19         | 14           |
| Computer/video game  | 10       | 10        | 11      | 11         | 17               | 6          | 6            |
| Consumer electronics (e.g. smartphone, laptop)                     | 10       | 10        | 9       | 8          | 14               | 9          | 5            |
| A meal subscription (e.g. HelloFresh, Blue Apron, Simply Cook)     | 6        | 6         | 4       | 5          | 10               | 5          | 0            |
| Home textiles/furniture  | 5        | 5         | 6       | 5          | 8                | 3          | 3            |
| Other  | 10       | 10        | 12      | 7          | 8                | 12         | 17           |
| I haven't purchased any of these                                   | 30       | 30        | 29      | 37         | 19               | 30         | 44           |

|  | Male<br>% | Female<br>% | Lower<br>Income<br>% | Higher<br>Income<br>% | Price-<br>Conscious<br>% | Impulse<br>Buyers<br>% | Savers<br>% |
|--|-----------|-------------|----------------------|-----------------------|--------------------------|------------------------|-------------|
| Takeout/takeaway delivery  | 32        | 28          | 28                   | 34                    | 36                       | 40                     | 46          |
| Grocery delivery   | 34        | 23          | 21                   | 43                    | 36                       | 58                     | 48          |
| Entertainment subscription service (e.g. Netflix, Disney, Spotify) | 19        | 16          | 15                   | 20                    | 16                       | 41                     | 21          |
| Beauty/personal care items (e.g. skincare, makeup)                 | 14        | 19          | 12                   | 29                    | 15                       | 27                     | 15          |
| Clothing/shoes   | 14        | 16          | 13                   | 15                    | 15                       | 28                     | 15          |
| A book/audiobook   | 16        | 13          | 10                   | 33                    | 15                       | 31                     | 19          |
| Computer/video game  | 13        | 8           | 6                    | 14                    | 10                       | 21                     | 9           |
| Consumer electronics (e.g. smartphone, laptop)                     | 12        | 7           | 6                    | 13                    | 10                       | 18                     | 10          |
| A meal subscription (e.g. HelloFresh, Blue Apron, Simply Cook)     | 9         | 4           | 3                    | 9                     | 5                        | 21                     | 8           |
| Home textiles/furniture  | 6         | 4           | 3                    | 7                     | 5                        | 14                     | 6           |
| Other  | 10        | 10          | 12                   | 14                    | 15                       | 6                      | 11          |
| I haven't purchased any of these                                   | 27        | 32          | 38                   | 14                    | 25                       | 9                      | 23          |

Question: In the past week, have you purchased any of the following online?

## Brand discovery during the outbreak

### % who say they've discovered new brands/products since the outbreak via the following channels

|   | All<br>% | U.S.<br>% | UK<br>% | Gen Z<br>% | Millennials<br>% | Gen X<br>% | Boomers<br>% |
|---|----------|-----------|---------|------------|------------------|------------|--------------|
| Ads seen on social media                                    | 27       | 29        | 13      | 31         | 35               | 24         | 7            |
| Ads seen on TV  | 27       | 29        | 14      | 36         | 29               | 25         | 12           |
| Ads seen on websites  | 24       | 26        | 12      | 28         | 31               | 20         | 10           |
| TV shows/films  | 22       | 24        | 13      | 21         | 25               | 23         | 14           |
| Recommendations/comments on social media                    | 21       | 23        | 11      | 24         | 29               | 18         | 4            |
| Word-of-mouth recommendations from friend or family members | 21       | 23        | 11      | 19         | 27               | 21         | 7            |
| Online retail websites                                      | 21       | 23        | 12      | 20         | 24               | 21         | 12           |
| Search engines  | 19       | 20        | 12      | 15         | 22               | 20         | 12           |
| Brand/product websites                                      | 16       | 18        | 10      | 14         | 20               | 18         | 6            |
| Ads seen before online videos or TV shows start to play     | 15       | 17        | 7       | 21         | 18               | 14         | 5            |
| Personalized purchase recommendations on websites           | 15       | 16        | 7       | 14         | 23               | 13         | 1            |
| Updates on brands' social media pages                       | 15       | 16        | 7       | 15         | 20               | 14         | 2            |
| Consumer review sites                                       | 14       | 15        | 9       | 12         | 19               | 14         | 6            |
| Stories/articles on newspaper or magazine websites          | 14       | 16        | 7       | 27         | 18               | 9          | 1            |
| Ads in magazines or newspapers                              | 12       | 13        | 6       | 13         | 19               | 8          | 2            |
| Emails or letters/mailshots from companies                  | 12       | 13        | 6       | 10         | 16               | 11         | 4            |
| Endorsements by influencers                                 | 10       | 11        | 5       | 13         | 16               | 6          | 4            |
| Vlogs   | 10       | 11        | 4       | 18         | 14               | 5          | 0            |
| Ads on music-streaming services                             | 10       | 10        | 6       | 12         | 16               | 6          | 3            |
| Ads/sponsored content on podcasts                           | 9        | 10        | 5       | 10         | 15               | 7          | 3            |

Question: Since the coronavirus outbreak, have you discovered any new brands or products via the following?

## Brand discovery during the outbreak

### % who say they've discovered new brands/products since the outbreak via the following channels

|   | Male | Female | Lower Income | Higher Income | Price-Conscious | Impulse Buyers | Savers |
|---|------|--------|--------------|---------------|-----------------|----------------|--------|
|   | %    | %      | %            | %             | %               | %              | %      |
| Ads seen on social media                                    | 31   | 22     | 22           | 36            | 31              | 53             | 46     |
| Ads seen on TV  | 33   | 20     | 26           | 29            | 29              | 57             | 45     |
| Ads seen on websites  | 30   | 17     | 21           | 22            | 32              | 50             | 44     |
| TV shows/films  | 27   | 17     | 16           | 35            | 24              | 58             | 33     |
| Recommendations/comments on social media                    | 26   | 16     | 19           | 21            | 28              | 49             | 39     |
| Word-of-mouth recommendations from friend or family members | 23   | 18     | 17           | 22            | 28              | 49             | 37     |
| Online retail websites                                      | 25   | 17     | 19           | 20            | 29              | 49             | 35     |
| Search engines  | 24   | 14     | 16           | 19            | 26              | 51             | 35     |
| Brand/product websites                                      | 20   | 13     | 16           | 14            | 26              | 45             | 34     |
| Ads seen before online videos or TV shows start to play     | 19   | 12     | 10           | 27            | 17              | 43             | 27     |
| Personalized purchase recommendations on websites           | 19   | 10     | 12           | 11            | 21              | 44             | 31     |
| Updates on brands' social media pages                       | 18   | 11     | 14           | 13            | 23              | 39             | 31     |
| Consumer review sites                                       | 19   | 9      | 12           | 12            | 22              | 40             | 27     |
| Stories/articles on newspaper or magazine websites          | 18   | 10     | 14           | 9             | 18              | 36             | 32     |
| Ads in magazines or newspapers                              | 14   | 9      | 8            | 10            | 14              | 40             | 22     |
| Emails or letters/mailshots from companies                  | 14   | 9      | 8            | 13            | 18              | 37             | 20     |
| Endorsements by influencers                                 | 12   | 8      | 7            | 9             | 14              | 34             | 18     |
| Vlogs   | 13   | 7      | 9            | 6             | 13              | 28             | 16     |
| Ads on music-streaming services                             | 13   | 6      | 6            | 7             | 13              | 35             | 19     |
| Ads/sponsored content on podcasts                           | 14   | 5      | 6            | 10            | 13              | 37             | 19     |

Question: Since the coronavirus outbreak, have you discovered any new brands or products via the following?

## Personal priorities during the outbreak

### % who say the following are their main personal priorities for the next month

|  | All<br>% | U.S.<br>% | UK<br>% | Gen Z<br>% | Millennials<br>% | Gen X<br>% | Boomers<br>% |
|--|----------|-----------|---------|------------|------------------|------------|--------------|
| Staying positive about the situation                                   | 59       | 60        | 52      | 51         | 57               | 61         | 67           |
| Ensuring I have necessary items to survive (e.g. food/household items) | 52       | 52        | 51      | 37         | 47               | 61         | 56           |
| Maintaining relationships with friends/family                          | 48       | 48        | 46      | 42         | 49               | 49         | 49           |
| Staying fit and healthy  | 47       | 48        | 42      | 48         | 48               | 48         | 42           |
| Using my spare time productively                                       | 46       | 47        | 40      | 37         | 47               | 50         | 43           |
| Keeping myself entertained   | 46       | 46        | 43      | 40         | 47               | 47         | 44           |
| Maintaining my/my household's mental health                            | 46       | 46        | 41      | 39         | 49               | 48         | 38           |
| Paying my household bills  | 44       | 45        | 43      | 22         | 40               | 51         | 67           |
| Staying constantly informed on new developments                        | 39       | 41        | 30      | 32         | 36               | 43         | 46           |
| Supporting vulnerable friends/family members                           | 39       | 40        | 37      | 35         | 40               | 43         | 31           |
| Managing my finances effectively                                       | 38       | 38        | 37      | 27         | 41               | 37         | 44           |
| Education/learning   | 32       | 34        | 22      | 57         | 33               | 26         | 10           |
| Staying productive with my professional work                           | 27       | 28        | 25      | 24         | 32               | 30         | 13           |
| Finding escapism from coronavirus                                      | 26       | 25        | 30      | 21         | 26               | 30         | 22           |
| Keeping my children entertained  | 26       | 27        | 22      | 12         | 30               | 34         | 10           |
| Canceling unneeded expenses (e.g. subscriptions)                       | 24       | 25        | 22      | 24         | 29               | 22         | 18           |
| Making use of government support packages                              | 23       | 25        | 13      | 15         | 23               | 25         | 26           |
| DIY/home improvement   | 20       | 21        | 19      | 18         | 23               | 20         | 18           |

Question: Which of the following are your main personal priorities for the next month?

## Personal priorities during the outbreak

### % who say the following are their main personal priorities for the next month

|  | Male | Female | Lower Income | Higher Income | Price-Conscious | Impulse Buyers | Savers |
|--|------|--------|--------------|---------------|-----------------|----------------|--------|
|  | %    | %      | %            | %             | %               | %              | %      |
| Staying positive about the situation                                   | 58   | 59     | 61           | 49            | 74              | 70             | 75     |
| Ensuring I have necessary items to survive (e.g. food/household items) | 47   | 57     | 51           | 53            | 74              | 64             | 60     |
| Maintaining relationships with friends/family                          | 48   | 48     | 47           | 42            | 66              | 63             | 62     |
| Staying fit and healthy  | 53   | 42     | 44           | 53            | 63              | 62             | 70     |
| Using my spare time productively                                       | 47   | 45     | 41           | 59            | 60              | 62             | 63     |
| Keeping myself entertained   | 47   | 44     | 44           | 39            | 59              | 65             | 58     |
| Maintaining my/my household's mental health                            | 45   | 46     | 45           | 39            | 62              | 57             | 58     |
| Paying my household bills  | 41   | 48     | 42           | 40            | 60              | 60             | 45     |
| Staying constantly informed on new developments                        | 42   | 37     | 38           | 37            | 57              | 60             | 58     |
| Supporting vulnerable friends/family members                           | 41   | 37     | 37           | 33            | 55              | 57             | 60     |
| Managing my finances effectively                                       | 39   | 37     | 33           | 36            | 56              | 57             | 48     |
| Education/learning   | 36   | 28     | 34           | 23            | 38              | 57             | 52     |
| Staying productive with my professional work                           | 33   | 22     | 20           | 41            | 40              | 51             | 50     |
| Finding escapism from coronavirus                                      | 26   | 26     | 26           | 23            | 43              | 40             | 35     |
| Keeping my children entertained  | 29   | 22     | 25           | 23            | 33              | 39             | 42     |
| Canceling unneeded expenses (e.g. subscriptions)                       | 24   | 25     | 21           | 22            | 36              | 42             | 28     |
| Making use of government support packages                              | 27   | 19     | 22           | 17            | 36              | 41             | 33     |
| DIY/home improvement   | 22   | 18     | 17           | 21            | 28              | 42             | 28     |

Question: Which of the following are your main personal priorities for the next month?



# Purchase priorities post-outbreak

## % who say they will prioritize the following purchases once the outbreak is over

|   | All % | U.S. % | UK % | Gen Z % | Millennials % | Gen X % | Boomers % |
|---|-------|--------|------|---------|---------------|---------|-----------|
| A vacation in my own country  | 18    | 17     | 21   | 25      | 19            | 15      | 14        |
| Insurance (e.g. health insurance, travel insurance)                     | 17    | 19     | 6    | 14      | 26            | 15      | 5         |
| Technology devices (e.g. smartphone, laptop, headphones)                | 13    | 13     | 11   | 14      | 19            | 10      | 6         |
| Home and furniture items (e.g. household furniture, kitchen appliances) | 12    | 12     | 11   | 11      | 17            | 9       | 9         |
| Travel tickets (e.g a flight)   | 11    | 10     | 12   | 7       | 13            | 11      | 8         |
| A vacation abroad   | 9     | 7      | 20   | 8       | 11            | 8       | 8         |
| A new car/vehicle   | 7     | 7      | 7    | 5       | 10            | 6       | 8         |
| Personal accessories (e.g. jewelry, watch)                              | 7     | 7      | 7    | 8       | 11            | 4       | 3         |
| A new house/flat  | 6     | 6      | 8    | 5       | 11            | 4       | 5         |
| Luxury products (e.g. handbag, purse)                                   | 5     | 6      | 4    | 6       | 8             | 4       | 3         |
| Other   | 8     | 8      | 7    | 8       | 7             | 9       | 7         |
| I'm not sure  | 14    | 14     | 14   | 11      | 13            | 15      | 16        |
| I'm not prioritizing any purchases after the outbreak                   | 31    | 31     | 29   | 27      | 20            | 39      | 40        |

|   | Male % | Female % | Lower Income % | Higher Income % | Price-Conscious % | Impulse Buyers % | Savers % |
|---|--------|----------|----------------|-----------------|-------------------|------------------|----------|
| A vacation in my own country  | 22     | 14       | 17             | 23              | 16                | 25               | 27       |
| Insurance (e.g. health insurance, travel insurance)                     | 22     | 12       | 15             | 13              | 24                | 44               | 34       |
| Technology devices (e.g. smartphone, laptop, headphones)                | 17     | 10       | 9              | 18              | 13                | 29               | 14       |
| Home and furniture items (e.g. household furniture, kitchen appliances) | 14     | 10       | 9              | 12              | 12                | 28               | 15       |
| Travel tickets (e.g a flight)   | 12     | 9        | 8              | 18              | 13                | 26               | 14       |
| A vacation abroad   | 11     | 7        | 6              | 12              | 10                | 15               | 8        |
| A new car/vehicle   | 9      | 5        | 5              | 7               | 9                 | 15               | 8        |
| Personal accessories (e.g. jewelry, watch)                              | 9      | 5        | 4              | 11              | 7                 | 17               | 7        |
| A new house/flat  | 7      | 5        | 4              | 7               | 6                 | 12               | 5        |
| Luxury products (e.g. handbag, purse)                                   | 7      | 3        | 3              | 9               | 5                 | 13               | 5        |
| Other   | 8      | 7        | 8              | 7               | 9                 | 8                | 10       |
| I'm not sure  | 12     | 16       | 15             | 7               | 15                | 10               | 9        |
| I'm not prioritizing any purchases after the outbreak                   | 25     | 37       | 34             | 34              | 27                | 9                | 21       |

Question: Once the coronavirus outbreak is over, which of the following purchases will you prioritize?

## Expectation from retailers

### % who say they expect retailers and ecommerce businesses to take the following steps to help manage the situation

|   | All % | U.S. % | UK % | Gen Z % | Millennials % | Gen X % | Boomers % |
|---|-------|--------|------|---------|---------------|---------|-----------|
| Having social distancing measures in place in-store                                     | 58    | 56     | 67   | 43      | 51            | 67      | 69        |
| Dedicated shopping hours/delivery slots for key workers, elderly, and vulnerable groups | 54    | 53     | 62   | 50      | 49            | 58      | 62        |
| Ensuring essential items are prioritized in terms of supply and delivery                | 49    | 48     | 54   | 40      | 49            | 54      | 49        |
| Offering free delivery  | 48    | 49     | 43   | 36      | 44            | 58      | 47        |
| Limiting the amount of items a customer can buy   | 48    | 46     | 59   | 36      | 43            | 53      | 60        |
| Discounts for key workers (e.g. health workers)   | 39    | 37     | 45   | 31      | 44            | 39      | 34        |
| Communicating business changes effectively to customers                                 | 37    | 37     | 37   | 28      | 38            | 40      | 38        |
| Offering customers a longer timeframe for refunds                                       | 29    | 27     | 40   | 24      | 27            | 32      | 34        |
| Other   | 6     | 6      | 4    | 5       | 5             | 6       | 5         |
| None of the above   | 6     | 6      | 5    | 5       | 4             | 6       | 10        |

|   | Male % | Female % | Lower Income % | Higher Income % | Price-Conscious % | Impulse Buyers % | Savers % |
|---|--------|----------|----------------|-----------------|-------------------|------------------|----------|
| Having social distancing measures in place in-store                                     | 53     | 63       | 57             | 64              | 72                | 52               | 56       |
| Dedicated shopping hours/delivery slots for key workers, elderly, and vulnerable groups | 52     | 56       | 54             | 43              | 68                | 56               | 65       |
| Ensuring essential items are prioritized in terms of supply and delivery                | 46     | 53       | 46             | 46              | 67                | 62               | 57       |
| Offering free delivery  | 47     | 50       | 46             | 48              | 61                | 55               | 52       |
| Limiting the amount of items a customer can buy   | 41     | 55       | 44             | 39              | 62                | 54               | 44       |
| Discounts for key workers (e.g. health workers)   | 39     | 38       | 37             | 34              | 53                | 55               | 52       |
| Communicating business changes effectively to customers                                 | 35     | 39       | 34             | 39              | 53                | 54               | 48       |
| Offering customers a longer timeframe for refunds                                       | 27     | 32       | 28             | 29              | 42                | 41               | 31       |
| Other   | 6      | 6        | 7              | 3               | 6                 | 3                | 5        |
| None of the above   | 5      | 6        | 7              | 6               | 2                 | 0                | 2        |

Question: Which of the following steps, if any, do you expect retailers and ecommerce businesses to take in order to manage the current difficult situation?

## Effect of outbreak on household earnings

### % who say that, since the outbreak, their ability to earn money has seen the following effect

|                      | All<br>%  | U.S.<br>% | UK<br>%   | Gen Z<br>% | Millennials<br>% | Gen X<br>% | Boomers<br>% |
|----------------------|-----------|-----------|-----------|------------|------------------|------------|--------------|
| No effect            | 16        | 14        | 24        | 7          | 11               | 21         | 25           |
| Minor effect         | 15        | 15        | 13        | 16         | 19               | 10         | 15           |
| Neutral              | 15        | 15        | 15        | 16         | 15               | 12         | 20           |
| Moderate effect      | 24        | 25        | 16        | 18         | 28               | 27         | 9            |
| Major effect         | 20        | 21        | 19        | 26         | 22               | 19         | 13           |
| Not relevant to me   | 11        | 11        | 13        | 18         | 5                | 10         | 19           |
| <b>NET an effect</b> | <b>44</b> | <b>46</b> | <b>35</b> | <b>44</b>  | <b>50</b>        | <b>46</b>  | <b>22</b>    |

  

|                      | Male<br>% | Female<br>% | Lower<br>Income<br>% | Higher<br>Income<br>% | Price-<br>Conscious<br>% | Impulse<br>Buyers<br>% | Savers<br>% |
|----------------------|-----------|-------------|----------------------|-----------------------|--------------------------|------------------------|-------------|
| No effect            | 14        | 18          | 12                   | 30                    | 15                       | 8                      | 12          |
| Minor effect         | 16        | 13          | 13                   | 14                    | 17                       | 22                     | 20          |
| Neutral              | 14        | 16          | 14                   | 14                    | 12                       | 9                      | 10          |
| Moderate effect      | 28        | 19          | 21                   | 22                    | 27                       | 41                     | 33          |
| Major effect         | 18        | 23          | 25                   | 14                    | 19                       | 15                     | 14          |
| Not relevant to me   | 11        | 11          | 14                   | 6                     | 9                        | 4                      | 12          |
| <b>NET an effect</b> | <b>46</b> | <b>42</b>   | <b>46</b>            | <b>36</b>             | <b>46</b>                | <b>56</b>              | <b>47</b>   |

Question: Since the coronavirus outbreak, has your ability to regularly earn money been affected at all?

# Anticipated recovery: global economy

## % who say that they expect the global economy to recover at the following pace

|                 | All<br>%  | U.S.<br>% | UK<br>%   | Gen Z<br>% | Millennials<br>% | Gen X<br>% | Boomers<br>% |
|-----------------|-----------|-----------|-----------|------------|------------------|------------|--------------|
| Extremely slow  | 17        | 15        | 27        | 10         | 16               | 19         | 21           |
| Moderately slow | 41        | 40        | 43        | 38         | 38               | 44         | 40           |
| Average         | 22        | 23        | 15        | 27         | 20               | 20         | 24           |
| Moderately fast | 11        | 12        | 7         | 6          | 18               | 8          | 7            |
| Very fast       | 2         | 2         | 1         | 2          | 2                | 1          | 2            |
| I'm not sure    | 8         | 9         | 7         | 17         | 6                | 7          | 6            |
| <b>NET slow</b> | <b>58</b> | <b>55</b> | <b>70</b> | <b>48</b>  | <b>54</b>        | <b>63</b>  | <b>61</b>    |
| <b>NET fast</b> | <b>13</b> | <b>14</b> | <b>8</b>  | <b>8</b>   | <b>20</b>        | <b>9</b>   | <b>10</b>    |

|                 | Male<br>% | Female<br>% | Lower<br>Income<br>% | Higher<br>Income<br>% | Price-<br>Conscious<br>% | Impulse<br>Buyers<br>% | Savers<br>% |
|-----------------|-----------|-------------|----------------------|-----------------------|--------------------------|------------------------|-------------|
| Extremely slow  | 16        | 18          | 20                   | 15                    | 16                       | 10                     | 10          |
| Moderately slow | 43        | 38          | 38                   | 55                    | 48                       | 42                     | 51          |
| Average         | 19        | 25          | 22                   | 16                    | 19                       | 25                     | 21          |
| Moderately fast | 13        | 8           | 8                    | 9                     | 9                        | 21                     | 9           |
| Very fast       | 2         | 1           | 1                    | 2                     | 1                        | 1                      | 1           |
| I'm not sure    | 8         | 9           | 11                   | 4                     | 7                        | 2                      | 9           |
| <b>NET slow</b> | <b>59</b> | <b>56</b>   | <b>58</b>            | <b>70</b>             | <b>64</b>                | <b>52</b>              | <b>61</b>   |
| <b>NET fast</b> | <b>15</b> | <b>9</b>    | <b>9</b>             | <b>11</b>             | <b>10</b>                | <b>22</b>              | <b>10</b>   |

Question: Once the coronavirus outbreak is over, how long do you think it will take for the following to recover fully? The global economy

## Anticipated recovery: local economy

### % who say that they expect their country's own economy to recover at the following pace

|                 | All<br>%  | U.S.<br>% | UK<br>%   | Gen Z<br>% | Millennials<br>% | Gen X<br>% | Boomers<br>% |
|-----------------|-----------|-----------|-----------|------------|------------------|------------|--------------|
| Extremely slow  | 18        | 17        | 26        | 14         | 17               | 18         | 26           |
| Moderately slow | 33        | 31        | 40        | 30         | 31               | 36         | 30           |
| Average         | 26        | 27        | 17        | 29         | 26               | 24         | 24           |
| Moderately fast | 15        | 16        | 8         | 16         | 18               | 13         | 11           |
| Very fast       | 3         | 3         | 2         | 3          | 2                | 3          | 3            |
| I'm not sure    | 6         | 6         | 7         | 8          | 6                | 6          | 6            |
| <b>NET slow</b> | <b>51</b> | <b>48</b> | <b>66</b> | <b>44</b>  | <b>48</b>        | <b>54</b>  | <b>56</b>    |
| <b>NET fast</b> | <b>18</b> | <b>19</b> | <b>10</b> | <b>19</b>  | <b>20</b>        | <b>16</b>  | <b>14</b>    |

|                 | Male<br>% | Female<br>% | Lower<br>Income<br>% | Higher<br>Income<br>% | Price-<br>Conscious<br>% | Impulse<br>Buyers<br>% | Savers<br>% |
|-----------------|-----------|-------------|----------------------|-----------------------|--------------------------|------------------------|-------------|
| Extremely slow  | 16        | 21          | 22                   | 15                    | 19                       | 9                      | 11          |
| Moderately slow | 34        | 31          | 34                   | 40                    | 38                       | 25                     | 36          |
| Average         | 24        | 28          | 23                   | 20                    | 25                       | 42                     | 32          |
| Moderately fast | 20        | 10          | 12                   | 18                    | 10                       | 19                     | 16          |
| Very fast       | 3         | 2           | 3                    | 3                     | 2                        | 3                      | 2           |
| I'm not sure    | 4         | 9           | 6                    | 4                     | 6                        | 2                      | 2           |
| <b>NET slow</b> | <b>50</b> | <b>52</b>   | <b>56</b>            | <b>55</b>             | <b>57</b>                | <b>34</b>              | <b>47</b>   |
| <b>NET fast</b> | <b>23</b> | <b>12</b>   | <b>15</b>            | <b>21</b>             | <b>12</b>                | <b>22</b>              | <b>18</b>   |

Question: Once the coronavirus outbreak is over, how long do you think it will take for the following to recover fully? Your own country's economy

## Anticipated recovery: personal finances

### % who say that they expect their personal finances to recover at the following pace

|                 | All<br>%  | U.S.<br>% | UK<br>%   | Gen Z<br>% | Millennials<br>% | Gen X<br>% | Boomers<br>% |
|-----------------|-----------|-----------|-----------|------------|------------------|------------|--------------|
| Extremely slow  | 12        | 12        | 12        | 10         | 10               | 14         | 16           |
| Moderately slow | 22        | 21        | 24        | 22         | 22               | 25         | 13           |
| Average         | 42        | 42        | 42        | 37         | 43               | 41         | 50           |
| Moderately fast | 12        | 13        | 8         | 8          | 16               | 11         | 11           |
| Very fast       | 3         | 3         | 4         | 4          | 4                | 3          | 1            |
| I'm not sure    | 9         | 9         | 10        | 20         | 7                | 6          | 8            |
| <b>NET slow</b> | <b>34</b> | <b>33</b> | <b>36</b> | <b>32</b>  | <b>32</b>        | <b>39</b>  | <b>29</b>    |
| <b>NET fast</b> | <b>15</b> | <b>16</b> | <b>12</b> | <b>12</b>  | <b>20</b>        | <b>14</b>  | <b>12</b>    |

|                 | Male<br>% | Female<br>% | Lower<br>Income<br>% | Higher<br>Income<br>% | Price-<br>Conscious<br>% | Impulse<br>Buyers<br>% | Savers<br>% |
|-----------------|-----------|-------------|----------------------|-----------------------|--------------------------|------------------------|-------------|
| Extremely slow  | 10        | 14          | 17                   | 8                     | 10                       | 6                      | 5           |
| Moderately slow | 21        | 22          | 26                   | 19                    | 24                       | 18                     | 22          |
| Average         | 41        | 43          | 38                   | 43                    | 47                       | 48                     | 50          |
| Moderately fast | 15        | 8           | 6                    | 20                    | 9                        | 22                     | 10          |
| Very fast       | 3         | 3           | 3                    | 7                     | 3                        | 3                      | 3           |
| I'm not sure    | 9         | 10          | 11                   | 4                     | 7                        | 3                      | 10          |
| <b>NET slow</b> | <b>31</b> | <b>36</b>   | <b>43</b>            | <b>27</b>             | <b>34</b>                | <b>24</b>              | <b>27</b>   |
| <b>NET fast</b> | <b>18</b> | <b>11</b>   | <b>9</b>             | <b>27</b>             | <b>12</b>                | <b>25</b>              | <b>13</b>   |

Question: Once the coronavirus outbreak is over, how long do you think it will take for the following to recover fully? Your personal finances

## Destination travel post-outbreak

**% of vacation intenders who say they are most likely to consider the following destinations when booking travel post-outbreak**

|                    | All<br>% | U.S.<br>% | UK<br>% | Gen Z<br>% | Millennials<br>% | Gen X<br>% | Boomers*<br>% |
|--------------------|----------|-----------|---------|------------|------------------|------------|---------------|
| Oceania            | 43       | 44        | 36      | 26         | 45               | 55         | -             |
| North America      | 37       | 39        | 24      | 50         | 38               | 21         | -             |
| The Caribbean      | 31       | 31        | 30      | 22         | 27               | 46         | -             |
| Western Europe     | 21       | 19        | 30      | 15         | 20               | 30         | -             |
| The Middle East    | 19       | 18        | 25      | 19         | 16               | 27         | -             |
| South America      | 19       | 21        | 12      | 17         | 21               | 20         | -             |
| Southeast Asia     | 19       | 18        | 20      | 20         | 17               | 20         | -             |
| West Asia          | 17       | 18        | 7       | 30         | 15               | 6          | -             |
| Central America    | 16       | 16        | 17      | 12         | 21               | 9          | -             |
| Northern Europe    | 15       | 13        | 22      | 16         | 17               | 10         | -             |
| East Asia          | 15       | 14        | 16      | 17         | 17               | 9          | -             |
| Central Europe     | 13       | 11        | 25      | 15         | 15               | 10         | -             |
| South Asia         | 13       | 12        | 20      | 17         | 15               | 7          | -             |
| Northern Africa    | 12       | 11        | 18      | 6          | 11               | 18         | -             |
| Eastern Europe     | 11       | 10        | 18      | 13         | 14               | 5          | -             |
| Southern Europe    | 10       | 7         | 25      | 13         | 10               | 7          | -             |
| Sub-Saharan Africa | 9        | 9         | 10      | 3          | 9                | 17         | -             |
| North Asia         | 9        | 9         | 10      | 8          | 13               | 4          | -             |

Question: When booking a vacation/holiday after the coronavirus outbreak is over, which of the following destinations are you most likely to consider?

\*Insufficient sample size

## Destination travel post-outbreak

**% of vacation intenders who say they are most likely to consider the following destinations when booking travel post-outbreak**

|                    | Male<br>% | Female<br>% | Lower<br>Income<br>% | Higher<br>Income<br>% | Price-<br>Conscious<br>% | Impulse<br>Buyers<br>% | Savers<br>% |
|--------------------|-----------|-------------|----------------------|-----------------------|--------------------------|------------------------|-------------|
| Oceania            | 41        | 45          | 25                   | 43                    | 57                       | 63                     | 48          |
| North America      | 41        | 29          | 35                   | 42                    | 29                       | 26                     | 35          |
| The Caribbean      | 28        | 36          | 32                   | 29                    | 35                       | 32                     | 36          |
| Western Europe     | 20        | 22          | 23                   | 25                    | 24                       | 30                     | 22          |
| The Middle East    | 19        | 20          | 25                   | 21                    | 19                       | 25                     | 27          |
| South America      | 23        | 13          | 19                   | 25                    | 20                       | 23                     | 21          |
| Southeast Asia     | 19        | 18          | 20                   | 20                    | 17                       | 17                     | 12          |
| West Asia          | 21        | 10          | 22                   | 12                    | 13                       | 13                     | 20          |
| Central America    | 19        | 11          | 10                   | 20                    | 13                       | 17                     | 8           |
| Northern Europe    | 14        | 15          | 10                   | 22                    | 17                       | 15                     | 10          |
| East Asia          | 15        | 14          | 11                   | 21                    | 16                       | 13                     | 10          |
| Central Europe     | 13        | 14          | 12                   | 18                    | 16                       | 13                     | 11          |
| South Asia         | 14        | 12          | 12                   | 16                    | 14                       | 11                     | 9           |
| Northern Africa    | 15        | 8           | 9                    | 12                    | 13                       | 21                     | 13          |
| Eastern Europe     | 11        | 12          | 11                   | 9                     | 13                       | 12                     | 9           |
| Southern Europe    | 9         | 12          | 10                   | 12                    | 12                       | 7                      | 7           |
| Sub-Saharan Africa | 11        | 7           | 9                    | 12                    | 13                       | 16                     | 14          |
| North Asia         | 10        | 7           | 6                    | 18                    | 10                       | 9                      | 5           |

Question: When booking a vacation/holiday after the coronavirus outbreak is over, which of the following destinations are you most likely to consider?





[www.globalwebindex.com](http://www.globalwebindex.com)

E [trends@globalwebindex.com](mailto:trends@globalwebindex.com)

Copyright © Trendstream Limited 2020. All rights, including copyright, in the content of GlobalWebIndex (GWI) webpages and publications (including, but not limited to, GWI reports and blog posts) are owned and controlled by Trendstream Limited. In accessing such content, you agree that you may only use the content for your own personal non-commercial use and that you will not use the content for any other purpose whatsoever without an appropriate licence from, or the prior written permission of, Trendstream Limited. • Trendstream Limited uses its reasonable endeavours to ensure the accuracy of all data in GWI webpages and publications at the time of publication. However, in accessing the content of GWI webpages and publications, you agree that you are responsible for your use of such data and Trendstream Limited shall have no liability to you for any loss, damage, cost or expense whether direct, indirect consequential or otherwise, incurred by, or arising by reason of, your use of the data and whether caused by reason of any error, omission or misrepresentation in the data or otherwise.