GWI

Coronavirus Research | April 2020

Series 6: Consumer Spending

Contents

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
NET more	**49**	**51**	**43**	**50**	**52**	**51**	**37**
NET less	**20**	**20**	**21**	**27**	**20**	**18**	**18**

	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
NET more	**53**	**45**	**51**	**57**	**52**	**55**	**63**
NET less	**18**	**22**	**20**	**15**	**19**	**14**	**11**

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	U.S.	UK	Gen Z	Millennials	Gen X	Boomers
	%	%	%	%	%	%	%
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 Income %	Higher Income %	Price-Conscious %	Impulse 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 %	U.S. %	UK %	Gen Z %	Millennials %	Gen X %	Boomers %
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 %	Female %	Lower Income %	Higher Income %	Price-Conscious %	Impulse Buyers %	Savers %
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 %	U.S. %	UK %	Gen Z %	Millennials %	Gen X %	Boomers %
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 %	Female %	Lower Income %	Higher Income %	Price-Conscious %	Impulse Buyers %	Savers %
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	U.S.	UK	Gen Z	Millennials	Gen X	Boomers
	%	%	%	%	%	%	%
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	U.S.	UK	Gen Z	Millennials	Gen X	Boomers
	%	%	%	%	%	%	%
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	U.S.	UK	Gen Z	Millennials	Gen X	Boomers
	%	%	%	%	%	%	%
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
NET an effect	**44**	**46**	**35**	**44**	**50**	**46**	**22**

	Male	Female	Lower Income	Higher Income	Price-Conscious	Impulse Buyers	Savers
	%	%	%	%	%	%	%
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
NET an effect	**46**	**42**	**46**	**36**	**46**	**56**	**47**

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	U.S.	UK	Gen Z	Millennials	Gen X	Boomers
	%	%	%	%	%	%	%
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
NET slow	**58**	**55**	**70**	**48**	**54**	**63**	**61**
NET fast	**13**	**14**	**8**	**8**	**20**	**9**	**10**

	Male	Female	Lower Income	Higher Income	Price-Conscious	Impulse Buyers	Savers
	%	%	%	%	%	%	%
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
NET slow	**59**	**56**	**58**	**70**	**64**	**52**	**61**
NET fast	**15**	**9**	**9**	**11**	**10**	**22**	**10**

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	U.S.	UK	Gen Z	Millennials	Gen X	Boomers
	%	%	%	%	%	%	%
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
NET slow	**51**	**48**	**66**	**44**	**48**	**54**	**56**
NET fast	**18**	**19**	**10**	**19**	**20**	**16**	**14**

	Male	Female	Lower Income	Higher Income	Price-Conscious	Impulse Buyers	Savers
	%	%	%	%	%	%	%
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
NET slow	**50**	**52**	**56**	**55**	**57**	**34**	**47**
NET fast	**23**	**12**	**15**	**21**	**12**	**22**	**18**

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	U.S.	UK	Gen Z	Millennials	Gen X	Boomers
	%	%	%	%	%	%	%
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
NET slow	**34**	**33**	**36**	**32**	**32**	**39**	**29**
NET fast	**15**	**16**	**12**	**12**	**20**	**14**	**12**

	Male	Female	Lower Income	Higher Income	Price-Conscious	Impulse Buyers	Savers
	%	%	%	%	%	%	%
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
NET slow	**31**	**36**	**43**	**27**	**34**	**24**	**27**
NET fast	**18**	**11**	**9**	**27**	**12**	**25**	**13**

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	U.S.	UK	Gen Z	Millennials	Gen X	Boomers*
	%	%	%	%	%	%	%
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 %	Female %	Lower Income %	Higher Income %	Price-Conscious %	Impulse Buyers %	Savers %
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?

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