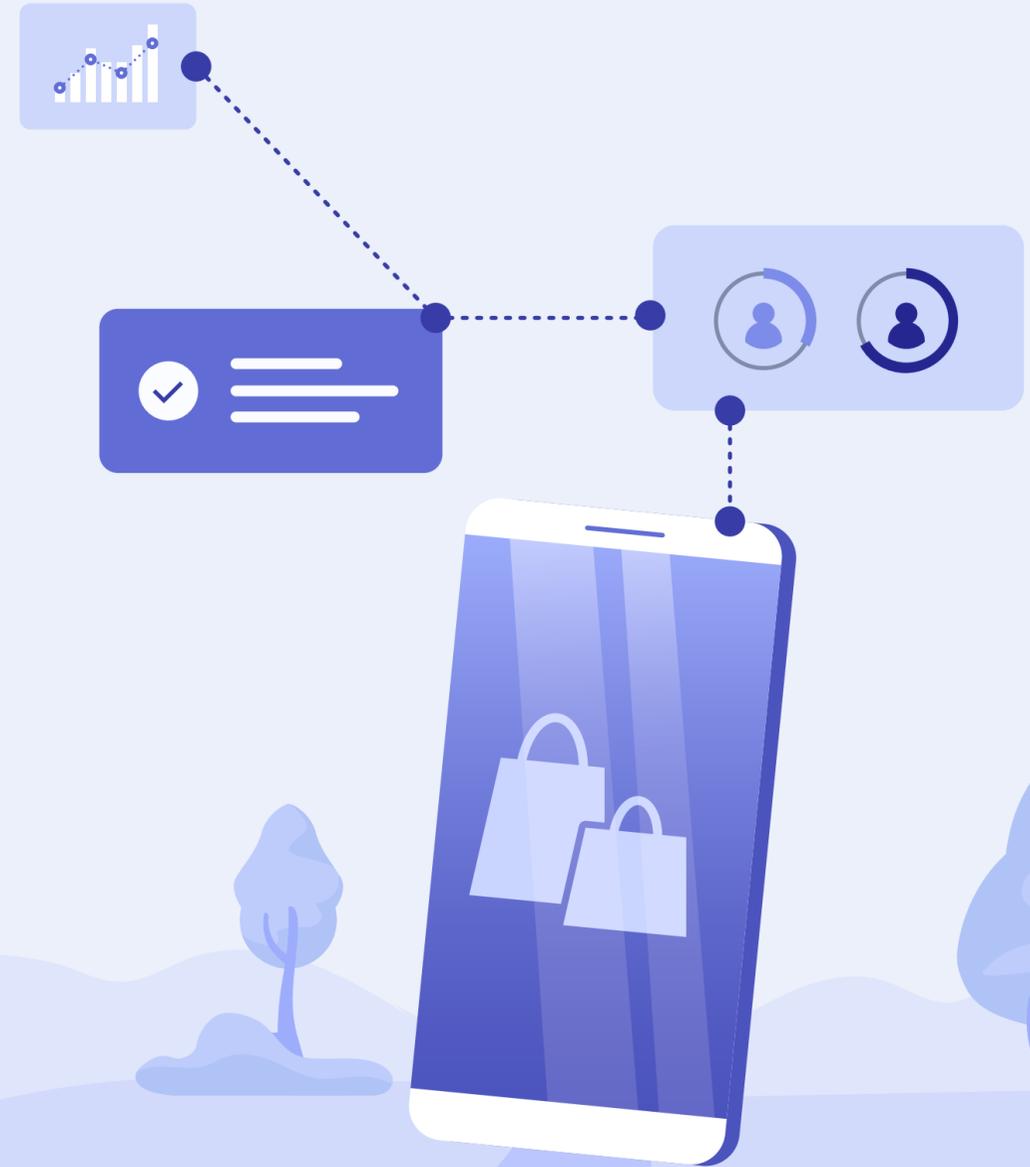


Road to recovery:

Brand survival in the new consumer landscape



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Introduction

Thriving in the aftermath of **COVID-19** is all about keeping consumers on side, and moving with them.

Doing this means listening to what they're asking for, understanding what they want from you, and changing your strategy to meet their needs.

This is where consumer insight plays a crucial role.

This guide looks at the essential changes to consumer behaviors and attitudes, and the steps to take to find out where to direct your attention.



The big picture: what's changed?

📍 **Almost 1 in 2** are doing more online shopping - and enthusiasm for it is growing.

📍 Consumers are craving more **reliability and convenience**.

📍 **3 in 4** did physical exercise during lockdown.

📍 Older people are consuming **more media**.

📍 Over **95%** of consumers are spending more time on in-home media consumption / activities.

📍 **Safety is top of mind** as consumers plan to be more risk-averse.

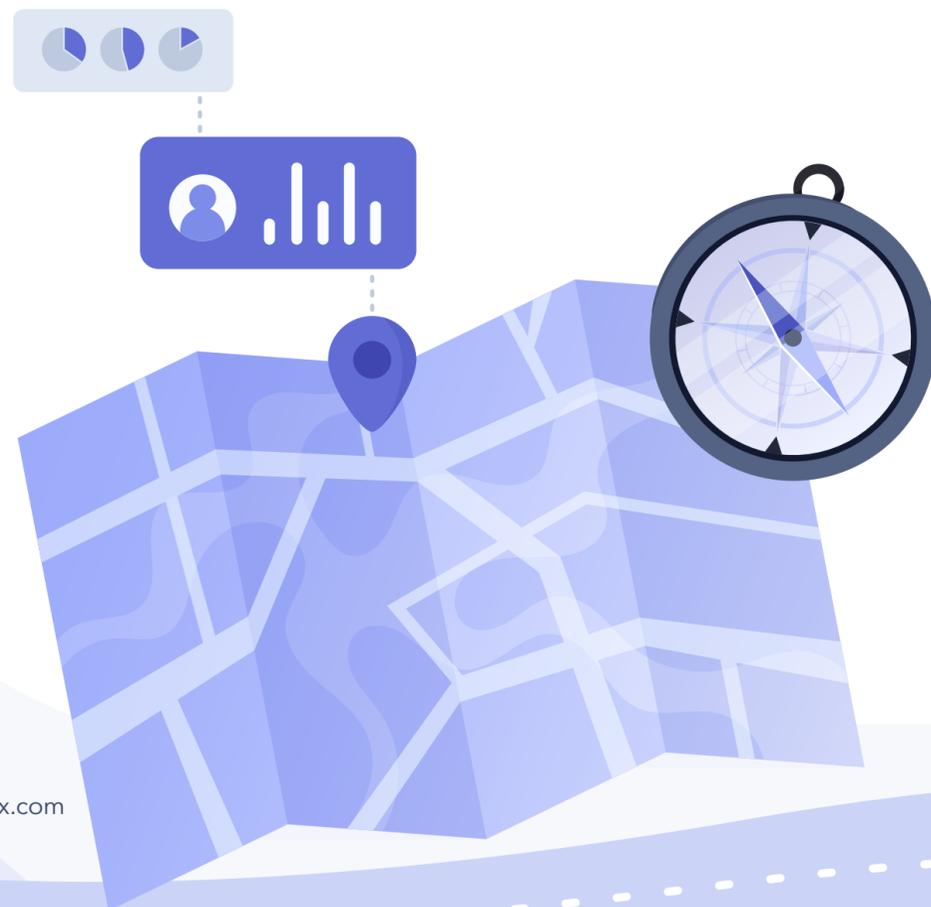
📍 Smartphone usage **continues to climb**.

📍 They're giving **out-of-home leisure spending** more consideration.

01

Knowing where to pivot and why

Looking closer: what's here to stay?



With radical change comes new habits, opinions and perceptions. 2020 so far has been a year of rapid and fluctuating change. Consumers are facing a new reality - and with this, they've got new priorities, new fears, and new expectations from the brands in their lives.

Using our fourth wave of coronavirus research fielded across 20 countries, we can map the crucial changes these consumers will bring with them to the post-pandemic world.

But a crucial question remains: what changes will stick? Here are some of the biggest trends we've identified that are most likely to continue.

1 Sustainability will keep growing in importance.

Our research across 20 countries shows rather than slowing, sustainability is set to reach new heights.

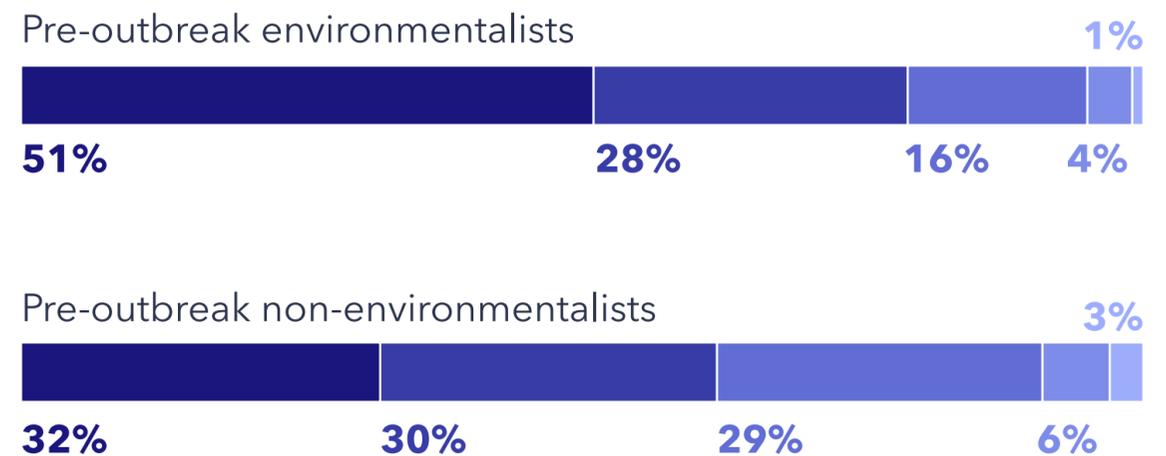
Globally, 3 in 4 say it will be important that companies behave more sustainably.

Not only this - over 2 in 3 think it will be more important than before to reduce their personal usage of single-use plastic, while 7 in 10 feel there will be heightened importance on reducing their personal carbon footprint / environmental impact.

Importance of reducing personal environmental impact

% who think that reducing their carbon footprint now has the following importance because of coronavirus

- A lot more important
- A little more important
- No change
- A little less important
- A lot less important



Question: Has the importance of any of these things changed for you, because of coronavirus? Reducing my carbon footprint / impact on the environment **Source:** GlobalWebIndex Custom Research, May 2020 **Base:** 17,143 internet users aged 16-64

2 Travel habits will continue to change.

Vacations continue to be the purchase that consumers are most likely to have delayed; globally, 51% say they have done this, hitting 60% or more in markets like China and Romania.

When asked what type(s) of vacation people intend to take in the next 12 months, domestic vacations and staycations in the local area top the list, scoring considerably more than short-haul foreign vacations or long-haul ones.

Vacation types in the next year

% who say they expect to take the following types of vacation in the next 12 months



Question: Which type(s) of vacation do you think you'll take in the next 12 months? **Source:** GlobalWebIndex Custom Research, May 2020 **Base:** 17,143 internet users aged 16-64

3 Consumers are re-assessing their personal finances.

When asked about their personal financial response to the coronavirus outbreak, over 90% are planning to change their behavior in some way.

This is reflected in the 83% of consumers expecting the pandemic to impact their personal finances, albeit with the largest amount anticipating only a small impact (44% say this, compared to 30% envisaging a big impact and 9% bracing for a dramatic impact).

Gen Z are most likely to think they'll need to dip into their savings. Nearly half of them expect to have to do this, compared to less than a fifth of baby boomers.

Globally, around 4 in 10 plan to cut back on their day-to-day spending or are looking to reduce their regular financial commitments (e.g. cancel subscriptions, memberships, etc).

4 Online shopping will continue to see a big boost.

Online shopping is set to grow - and this enthusiasm has increased since April, showing no signs of waning even as more countries move into the recovery phase of the pandemic.

46% plan to shop online more after the outbreak (+3% since April).

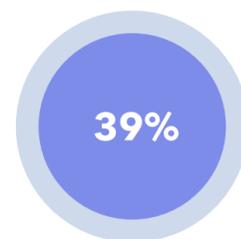
Free delivery is the single biggest motivator for global consumers when online shopping, with discounts and customer reviews taking second and third place.

Online shopping drivers

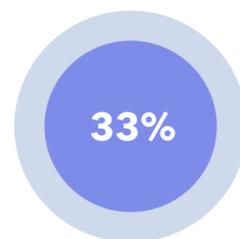
% who say when shopping online, these features would most increase their likelihood of buying a product



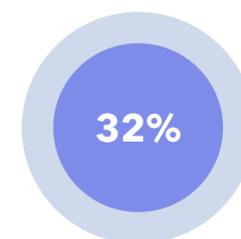
Free delivery



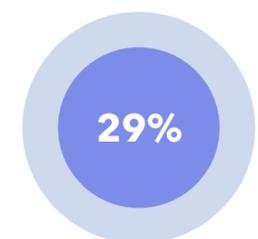
Coupons and discounts



Reviews from other customers



Easy returns policy



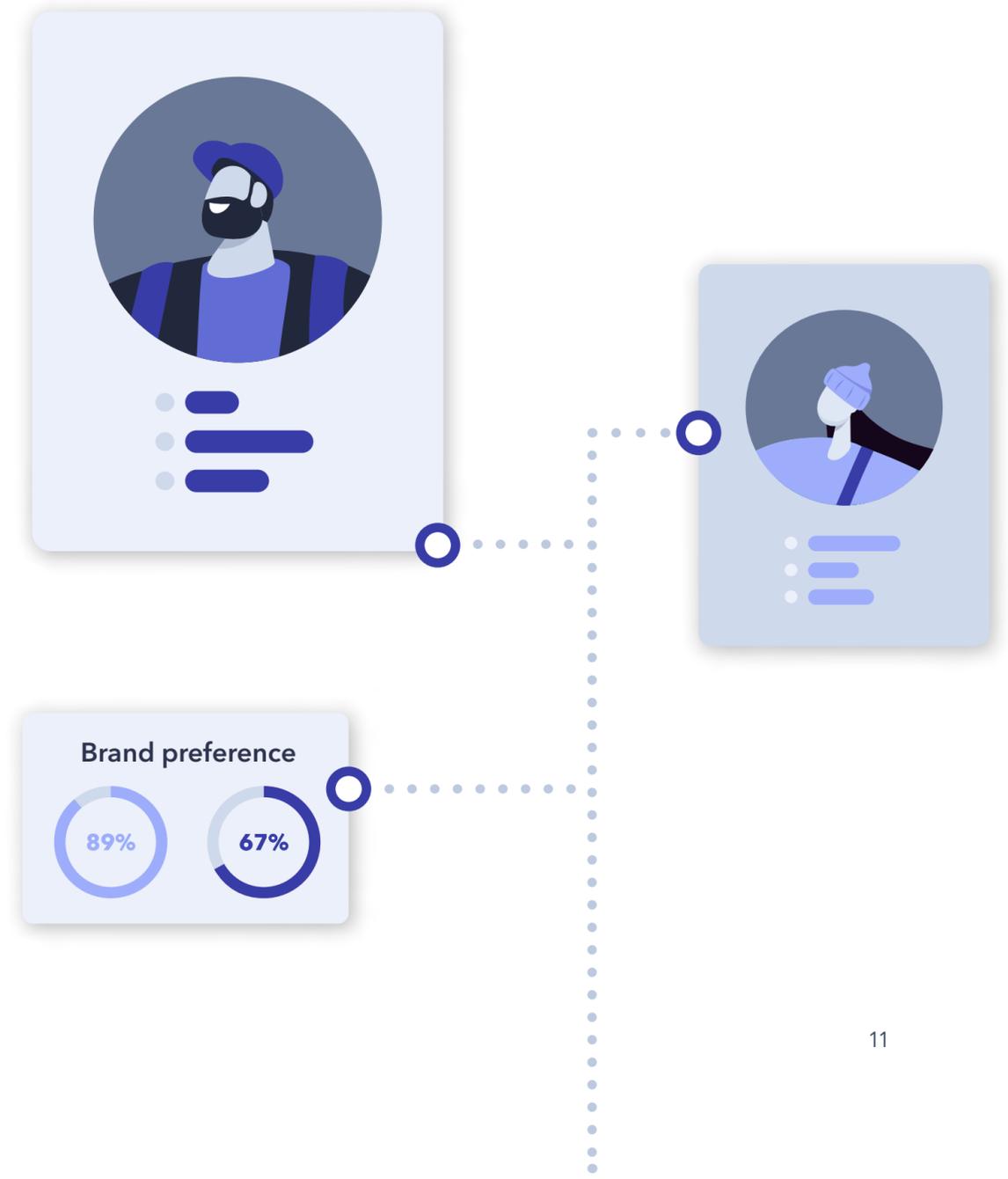
Quick/easy online checkout process

Question: How do you typically find out about new brands and products? **Source:** GlobalWebIndex Q1 2020 **Base:** 175,545 internet users aged 16-64

Is your purpose still fit for purpose?

Any brand worth its salt has a carefully considered and configured strategy to land and retain customers. But extraordinary circumstances require flexibility. In short, the same strategy won't get you the same results.

This flexibility will make all the difference when it comes to resonating with the right consumers, both during and after the outbreak. Doing this means staying as close to your consumers as possible - not only keeping up, but tracking fast-changing behaviors and attitudes.



ROAD TO RECOVERY

You may be well-acquainted with the steps needed to shape a **brand purpose** that's grounded in insight, but in case you need a refresh:

1
Get a local perspective.

2
Cross-reference with global trends.

3
Explore sector-specific sentiments.

4
Consult brand and competitor data.

5
Test your ideas and concepts.

Debra Sobel, Co-Founder and Managing Director of brand purpose agency Verity London, **says**, “There are winners and losers, and the intelligent brands, the competitive brands, are the ones that realise they need to activate their purpose now.



They need to communicate effectively and be authentic. In the long term they will gain.

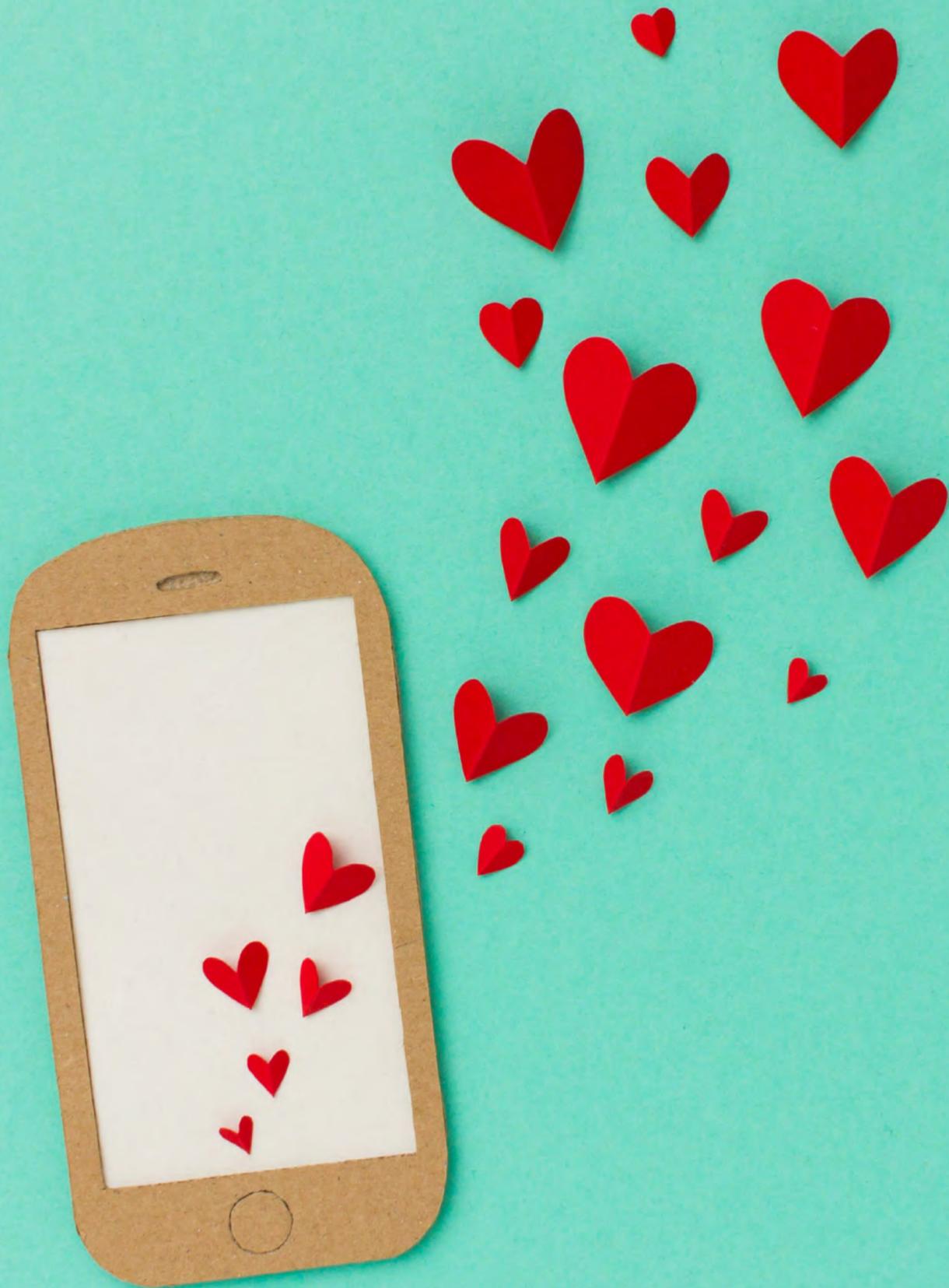
Globally, only 20% strongly approve of brands running “normal” advertising campaigns.

And while this is up 11% since the end of March / start of April, proving it’s crucial for brands to not cease their advertising efforts, it shows you need to turn to authenticity and purpose to ring true.

Case study

Match Media:

finding the opportunities



The challenge

Combined with their internal data, the Match Media teams rely heavily on GWI's core attitudinal and behavioral research across 46 countries to help their partners craft ad campaigns that are centered 100% around the consumers they're targeting - especially in a rapidly evolving dating market.



Before making a decision around advertising, our partners ask us: 'what can you guys tell us to help us get a leg up on this audience?'

Vicki Shapiro, Vice President of Marketing at Match Media Group

To keep answering this question in the face of radical change, they needed to know more:

- ✓ Was engagement increasing among their audiences?
- ✓ How was the mindset evolving?
- ✓ Were new audiences emerging?
- ✓ What did their audiences want from their new experience?
- ✓ What support or guidance were they seeking?
- ✓ How are their purchase influences or habits changing?

The action

After witnessing a spike in engagement across all platforms, the teams knew there was a wealth of opportunity their partners and sales teams could tap into. The next step was finding out what these were. Shifting their attention to GWI's global coronavirus research, they could apply their own audiences and brands, pinpointing the changes that were happening in terms of behaviors, attitudes and more.

One obvious trend they needed to keep a close eye on with their audiences in lockdown globally was video dating, or 'dating from home'. A key question the team needed to answer was whether this trend would outlast the crisis.

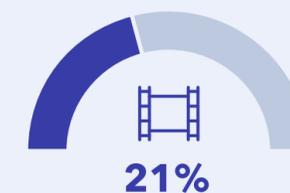
"Once we found that a shared activity was a top preference, we could look at ways to tie our advertising partners into it", says Divya.

Singles are interested in dating activities

% of those interested in online dating who said that the following would make them more likely to try



Online games setup for dating



A synchronized movie you could watch with the other person



An organized online speed dating event

Question: Which of the following, if any, would make you more likely to try online dating? **Source:** GlobalWebIndex Insights recontact May 2020, Wave 1



That's a good example of having the data first to see what our members are looking for, then tapping into advertisers that work in that space.

The result

The global crisis has brought many brands to their knees, but these insights helped Match Media shed light on new opportunities.

Food delivery is one example - being able to see their users were relying on one food delivery app over another, they knew there was a story to tell for that brand.

"We found that free delivery remained the top purchase driver for our members, both pre and during COVID-19", says Divya.

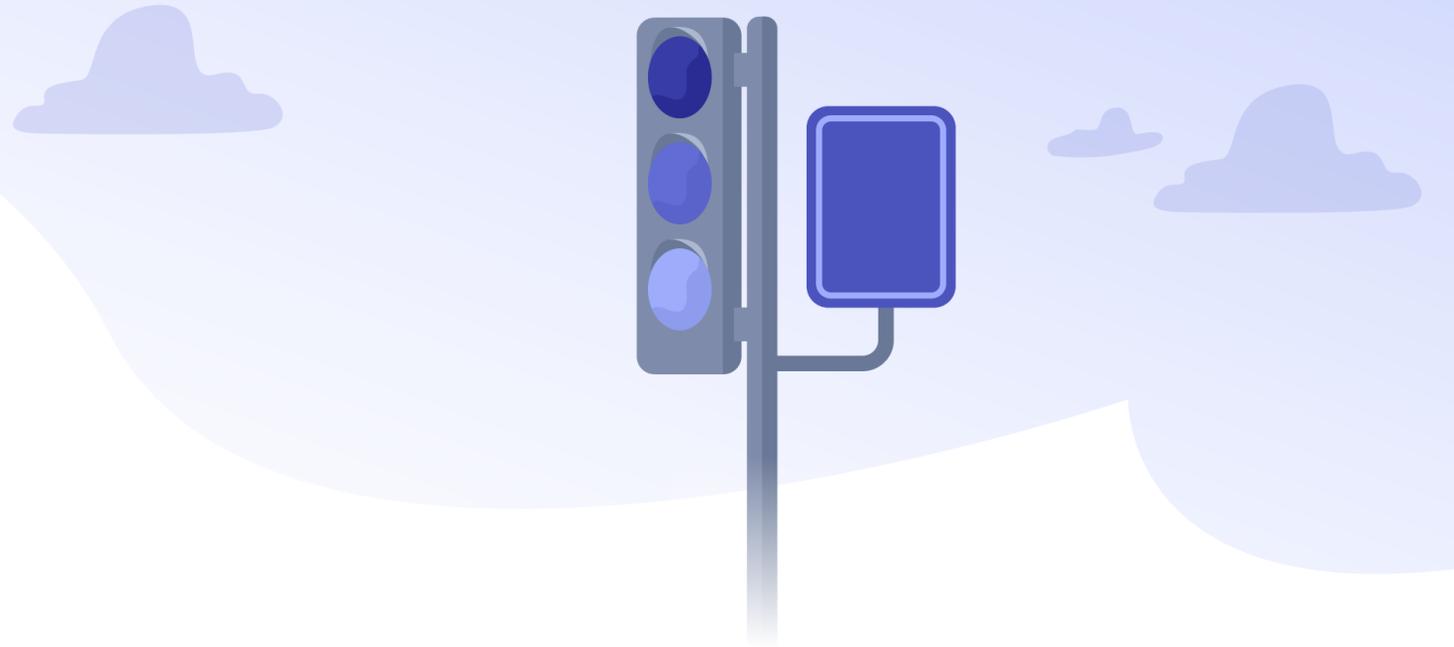


This is proof that staying close to your consumers pays off.

"A new finding for us from GWI's wave 3 results was that Gen Z wanted to purchase from brands and services that took a stand to help people during the pandemic. Brands that do this will make gains in terms of customer loyalty post-pandemic.

So when a potential partner came to us with an opportunity to not only promote their free delivery service, but their efforts to support a relevant charity, we knew it was a perfect fit."

Insight sources: May 2020 GWI recontact survey of 3,022 internet users in the UK and U.S. Singles are defined as respondents with relationship status: single, divorced, or widowed.



Generation spotlight:
**Brand approval
among Gen
Z and baby
boomers**

The global situation is complex, and so are the consumers at the heart of it. That means a general view isn't enough.

By delving deeper into the different waves of our coronavirus research, we can track not only what different generational splits want from brands, but how these wants have changed throughout the outbreak.

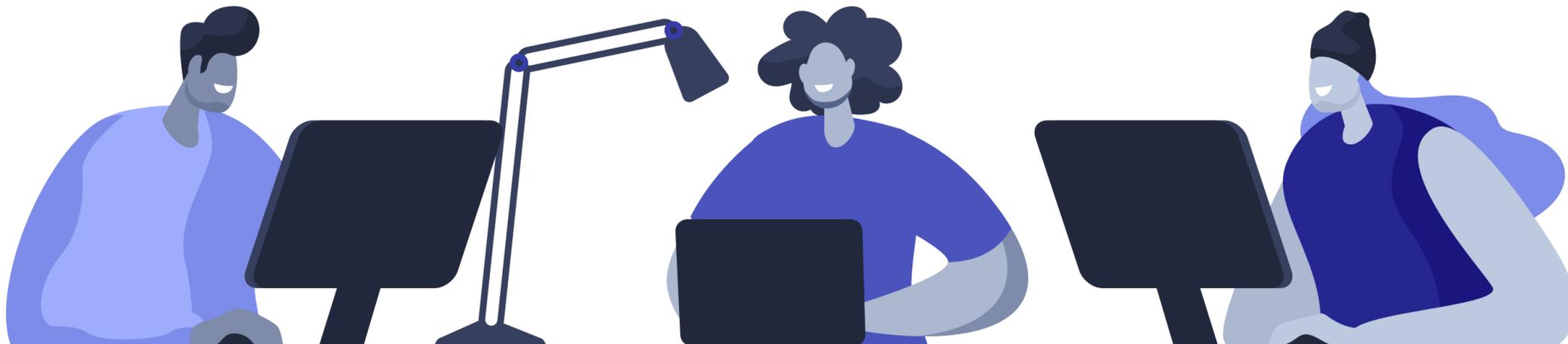
Focusing on our youngest generational split (Gen Z, 16-23 years-old) and our oldest (baby boomers, 57-64 years-old), we can get a clear view of how the pandemic has influenced them.

Here are some key insights:

Baby boomers and Gen Z share their sentiment towards brands running ad campaigns that are unrelated to COVID-19, with 54% approving of it across both generations.

78% of Gen Zs approve of brands getting in touch about how they responded to the outbreak (down 2 points) - and boomers are 1% less likely to approve than they were in late March / early April.

Endeavors like running COVID-related advertising, providing practical information, and providing entertaining content have all enjoyed high approval ratings across generations - and have held steady throughout the pandemic.



Data in action:

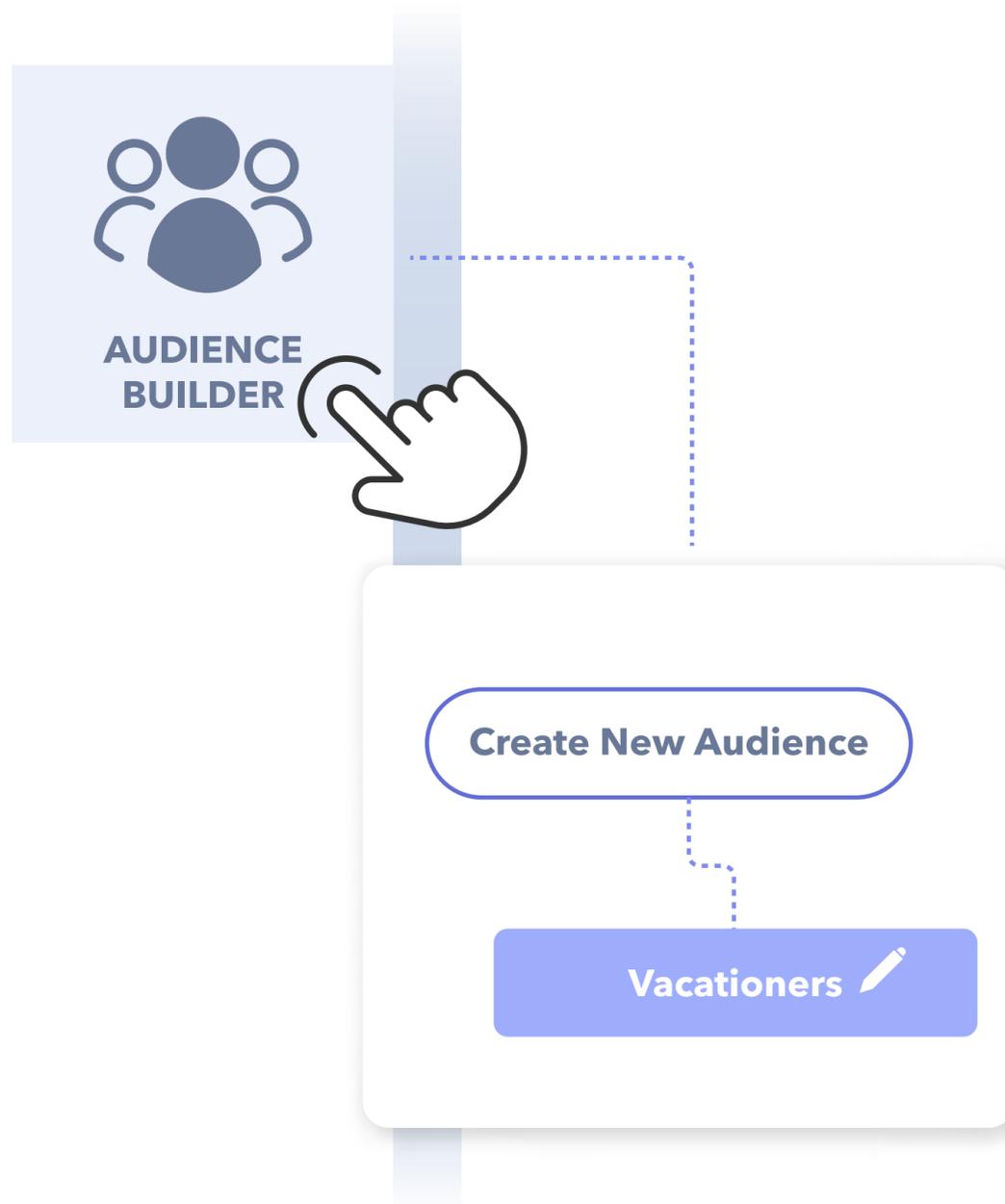
Assessing the impact on your consumers



A key question has been “what are the key behavioral and attitudinal shifts in my sector, and will they endure into the recovery phase and beyond?”

Finding the answer is more simple than you’d think, here’s how.





Step 1 Create an audience.

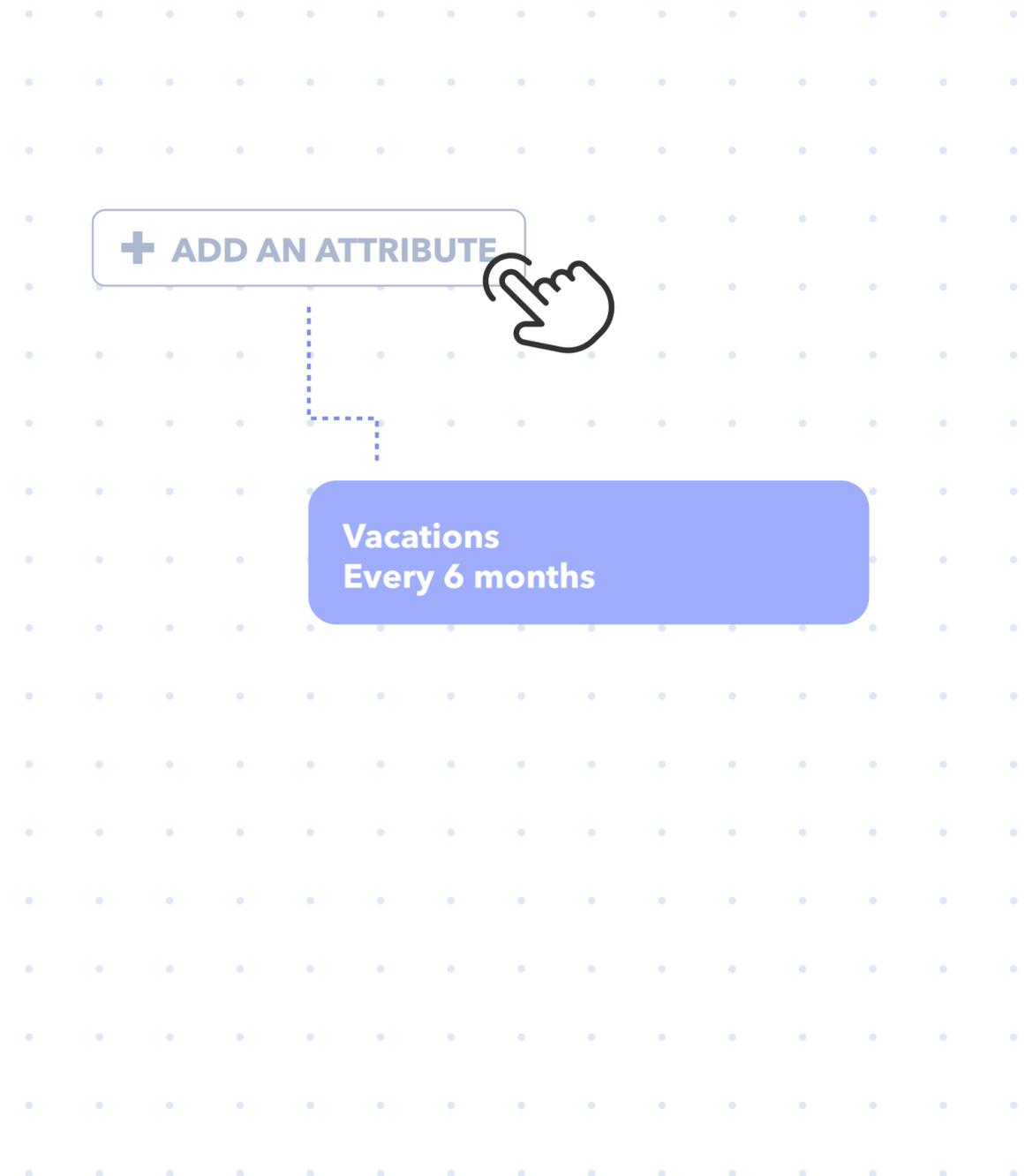
Once you're in the **GWl platform**, you can build out your audience in as much detail as you need.

If you already have a strong idea around who you want to target, simply create it fresh and give it a name.

Step 2 Add your audience attributes.

Combine any number of attributes - including behavioral, psychographic, and regional - to reveal the big picture.

Drill down into the data set and source relevant attributes. If you know the attributes you're after already, use the 'search' function to find your data points faster.





Step 3 Group the character traits.

Grouping attributes allows you to easily map out your statements in a visual and digestible way - helping craft your target persona.

You can tailor each statement to expand or narrow the pool of respondents.

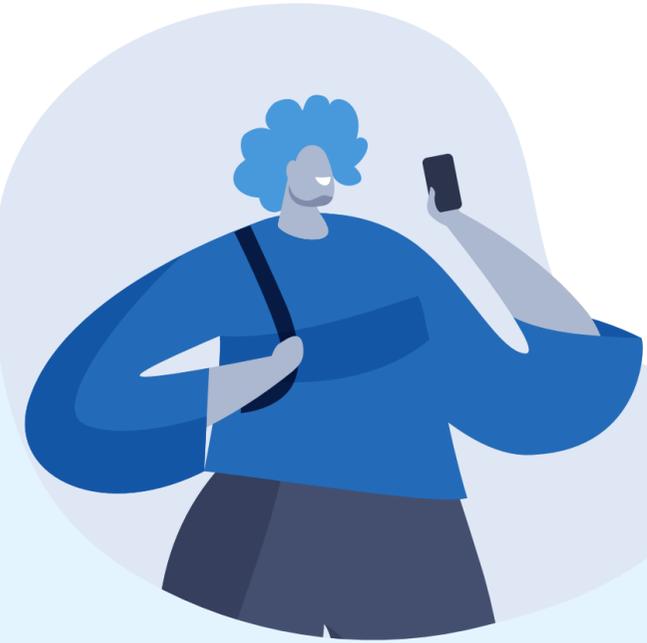
02

Smarter spending: rethinking your marketing

ROAD TO RECOVERY

The post-pandemic consumer world may never look how it used to. That's why the brands that were committed to adapting to their consumers during the various stages of global lockdowns will see the benefits of these efforts for years to come.

And while the natural response might be to halt your marketing efforts, this may cause issues in the long run.



ROAD TO RECOVERY

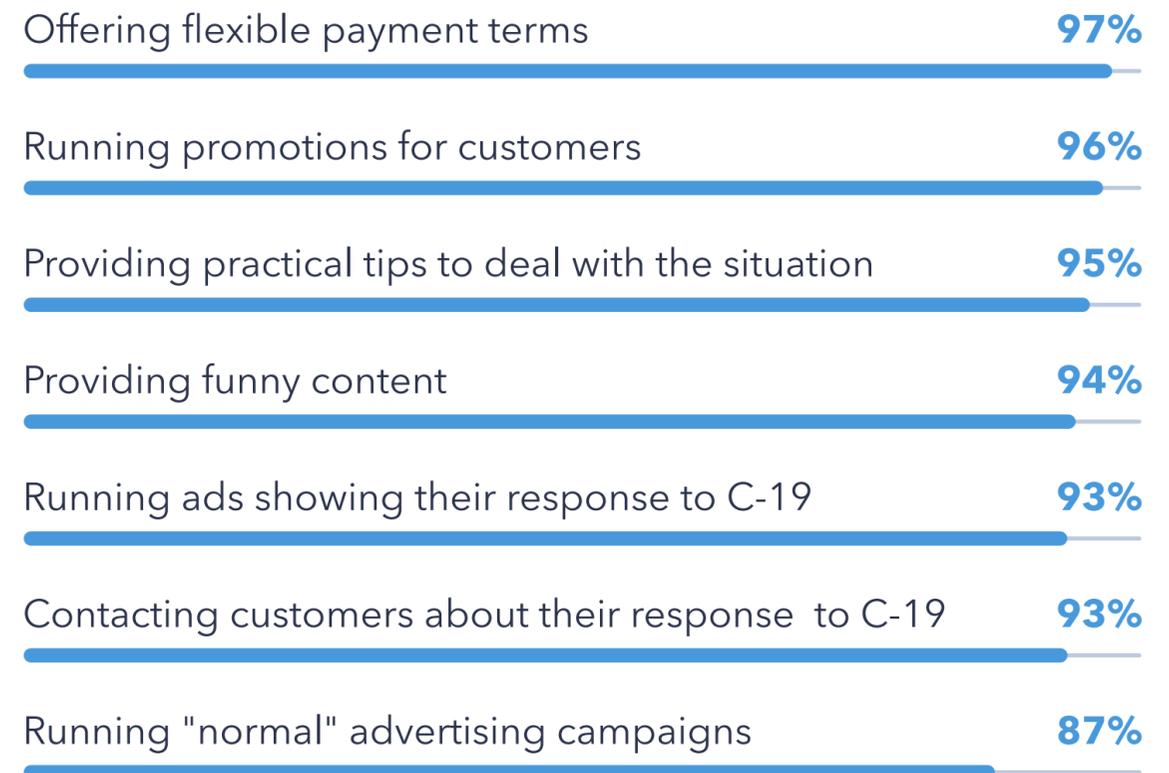
Any brand looking to retain customers must do the exact opposite of minimizing spend - investing in your audience and carefully tracking them throughout the pandemic.

Staying close to your target audience will ensure you strengthen your connections with them, rather than disappear during a time of crisis.

And there are plenty of ways you can reach your audience while remaining sensitive and optimizing your budget. Here's what global consumers want to see from brands during this time.

What consumers want from brands

% who strongly or somewhat approve, or neither approve/disapprove, of brands doing the following at the moment



Question: Many brands and companies are trying to decide how best to respond to the coronavirus / COVID-19 outbreak. To what extent do you approve / disapprove of them doing the following at the moment?

Source: GlobalWebIndex Insights recontact May 2020, Wave 1

Base: 17,143 internet users aged 16-64

Changing the way we plan media

There are lessons to be learned from the likes of Google. These are their top COVID-19 **media planning lessons** so far:

- ✓ **Consumer trends** are more crucial than ever.
- ✓ The old strategy playbook has been **thrown out**.
- ✓ **Media planning** now has to be lightning-quick.
- ✓ Brand campaigns need more thought around **how, when and where**.



Facing that change:

The steps to take

1. Take stock: Determine what's changed for you. Is there a smaller budget, less resource, a lack of physical outlets, or a lack of useful knowledge?

2. Track the big trends: Access real, fresh data into the coronavirus pandemic and how it continues to impact your consumers. Without asking them, you don't truly know how they feel or what they want.

3. Re-evaluate your purpose: Identify what your reason for being is. Why should your consumers choose you, and continue to do so?

4. Place ads strategically: Consumer behaviors are changing fast - make sure you move with them so your ads are in the right place at the right time.

5. Keep coming back to the research: The global situation will sit in limbo for quite some time. Our research will refresh often to give brands up-to-date information on how this impacts consumers.

A word from our CEO:

Advertising in the next normal



Tom Smith CEO, GWI

Advertising plays a crucial role in our economy and wider society.

So should you stop advertising in a crisis? Put simply, no you shouldn't.

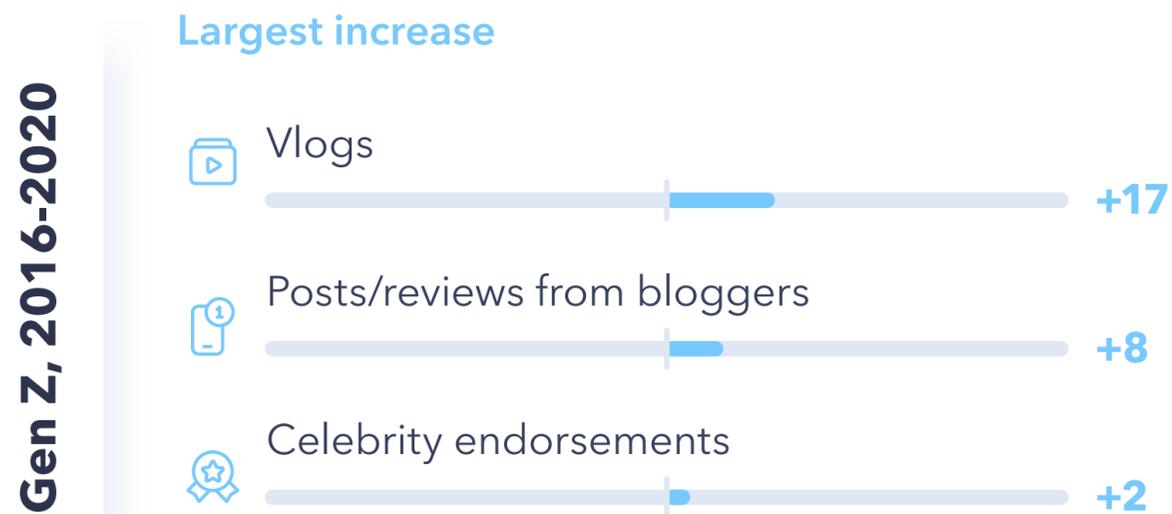
Our data showed 87% of consumers either approved of, or were impartial to, brands carrying on as normal during the crisis. For COVID-related advertising, approval rose to 93%.

It's understandable for businesses to feel a level of uncertainty on how to leverage their marketing efforts during a pandemic. But like most, this crisis won't have a quick resolution, nor will we be getting back to 'normal' any time soon.

At this time, businesses simply must look ahead - to the 'next normal', where mindful advertising, carefully placed, will continue to be a crucial element of the brand-consumer relationship.

Generation spotlight:

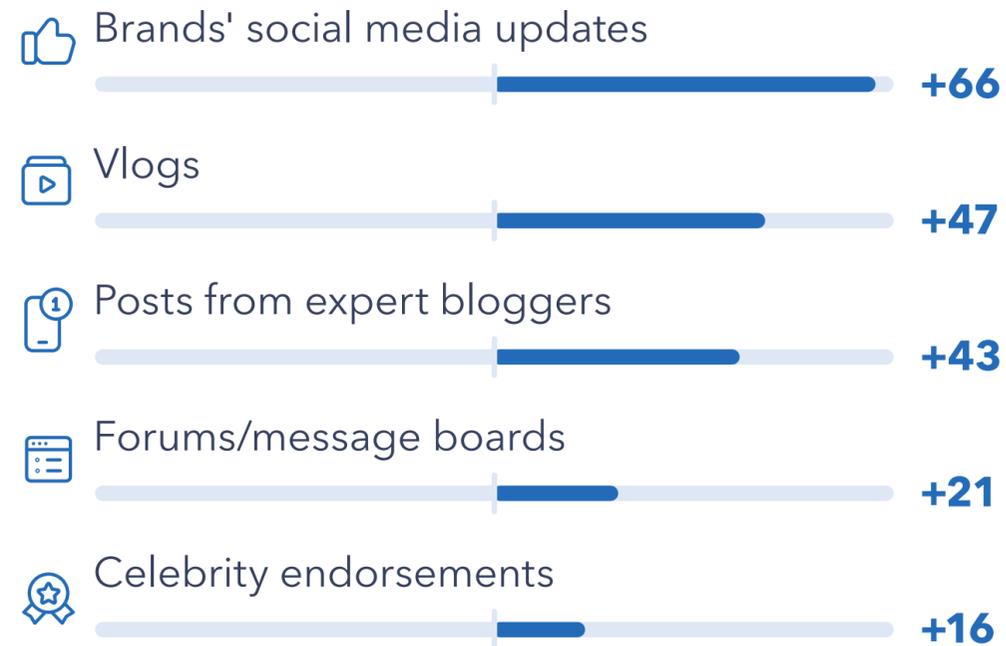
Brand discovery among Gen Z and baby boomers



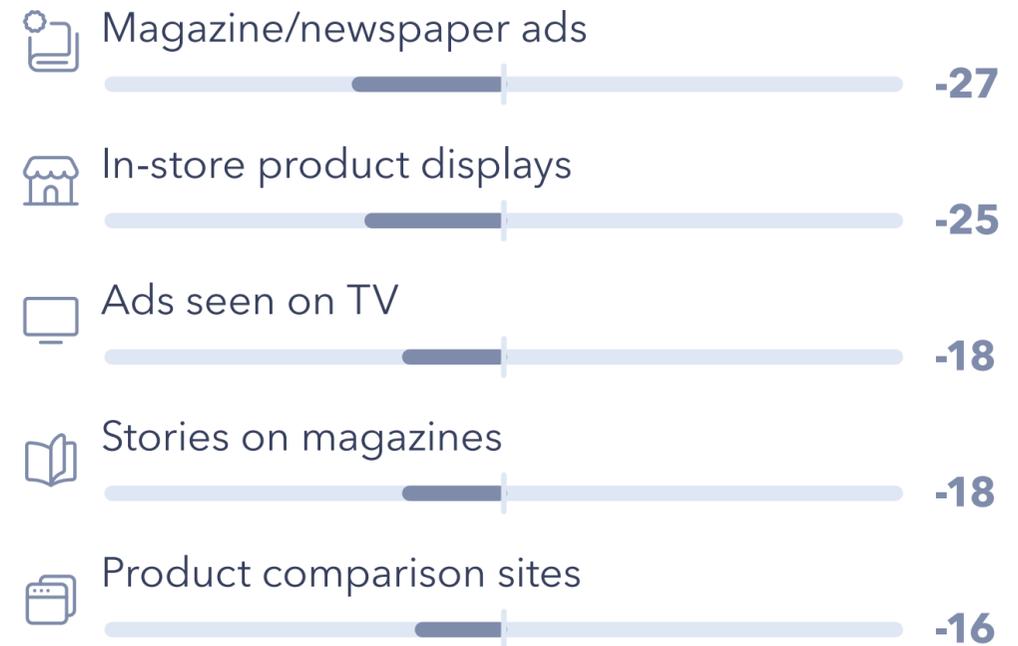
Question: How do you typically find out about new brands and products? **Source:** GlobalWebIndex Q1 2016 - Q1 2020 **Base:** (2016) 13,981 Gen Zs | (2020) 37,418 Gen Zs (aged 16-23)

Baby boomers, 2016-2020

Largest increase



Largest decrease



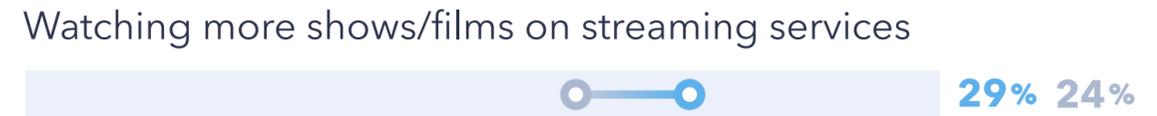
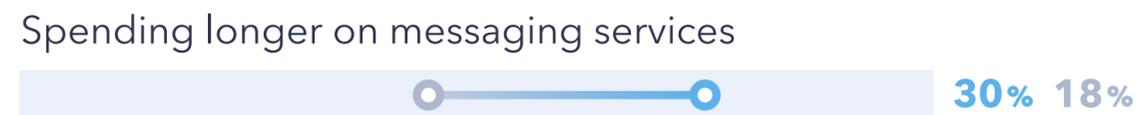
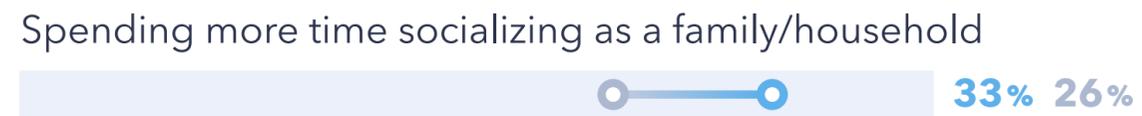
Question: How do you typically find out about new brands and products? Source: GlobalWebIndex Q1 2016 - Q1 2020
Base: (2016) 33,744 baby-boomers | (2020) 15,316 baby-boomers (aged 57-64)

Persona spotlights:

Car Buyers and Fitness Fanatics

Car Buyers are 12% more likely to spend more time on messaging services once the pandemic ends

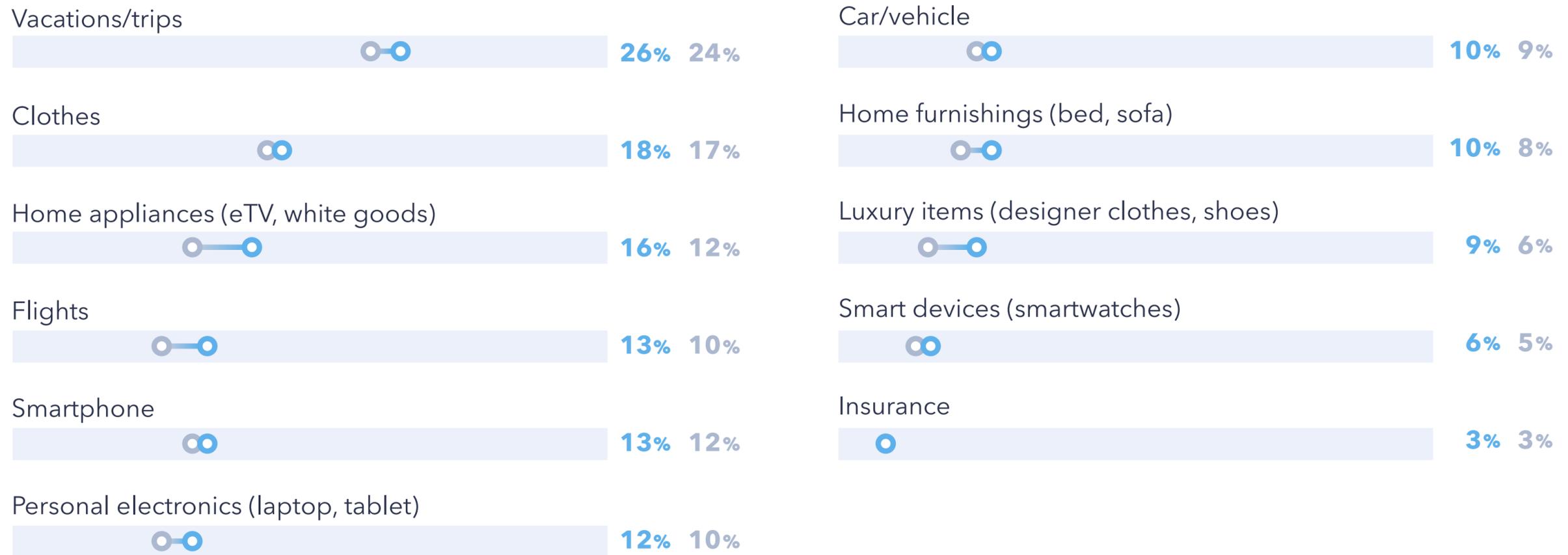
Car buyers All internet users



Question: Once the coronavirus outbreak is over, do you think you'll carry on doing the following? **Source:** GlobalWebIndex Custom Research May 19-26 2020 **Base:** 17,140 internet users and 3,137 car buyers aged 16-64

Fitness Fanatics who delayed purchases during the pandemic are more likely than average to prioritize buying flights over smartphones

● Fitness fanatics ● All internet users



Question: Which large purchases will you prioritize making first? **Source:** GlobalWebIndex Custom Research May 19-26 2020 **Base:** 17,140 internet users and 3,438 fitness fanatics aged 16-64

Data in action:

Tracking trends in the next normal

Looking back at the development of trends happening in your industry among your target audience is one way to help you predict what's to come.

With GWI, you'll get a clearer view on which **consumer trends** are fleeting and which are here to stay. Here's how:

- ✓ Apply your own, unique audience to get a bespoke indication of the key trends that matter to you.
- ✓ Compare our four waves of coronavirus data for a specific view into how things have changed during the outbreak until now, or trend our 40,000 data points to assess wider developments.
- ✓ For deeper analysis, this data can be inputted into our crosstab builder, allowing for a more detailed look into niche audiences and specific regions.

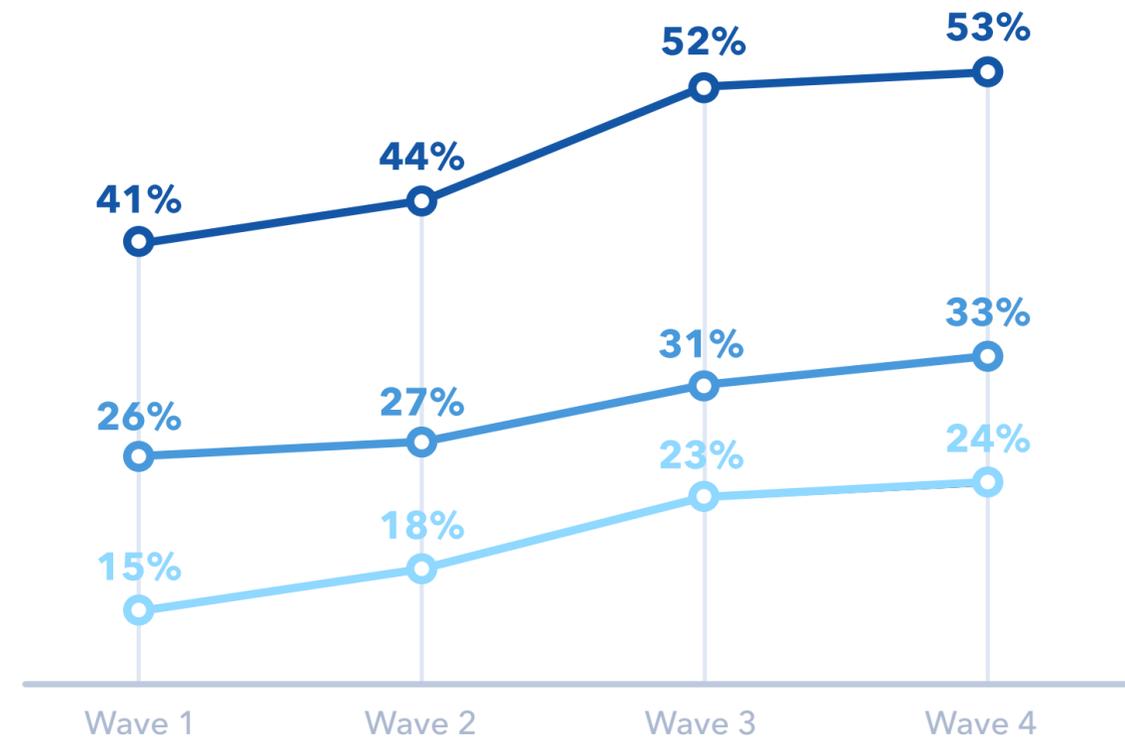
Example

To showcase the kind of trends the data can reveal, let's look at the changes in buying habits in two high-spend sectors - luxury goods and travel - since the outbreak began.

Key learnings

- ✔ More and more holiday-marketers are planning to push back their vacations both domestic and abroad.
- ✔ Despite some airlines now allowing pre-booking, more people are reluctant to commit now than in wave 1.
- ✔ Increasing numbers of consumers are delaying the purchase of luxury items.

-  Delayed vacations
-  Delayed flights
-  Delayed luxury items (designer clothes, shoes)



Question: Have you delayed purchasing any of the following, as a result of the coronavirus/COVID-19 outbreak? **Source:** GlobalWebIndex Custom Research March 16-20, March 31-April 2, April 22-27, May 19-26 2020 **Base:** 12,845 (March 16-20), 12,246 (March 31-April 2), 12,426 (April 22-27), 12,578 (May 19-26) internet users aged 16-64 in 13 countries

03

Sector spotlights

5 key takeaways for CPG brands

1. Get fit for ecommerce.

With growth already strong, it was always the new battleground for brands. But as digital channels have accelerated, it's left some underweight and with not enough understanding of their online consumer.

Additionally, some categories have seen a rapid expansion of DTC which can be a key play in making lasting, meaningful connections with consumers, and delivering a brand experience that stands out.

2. Assess your customer experience.

Customer experience, as delivered digitally, has been pushed forward by many. Some companies are creaking under the pressure and need to reappraise what really matters to their core audiences.

3. Double down on purpose.

The best brands are - and this is creating sustainable advantage for those where it's the most authentic, and part of their organization's DNA.

4. Check your segmentation.

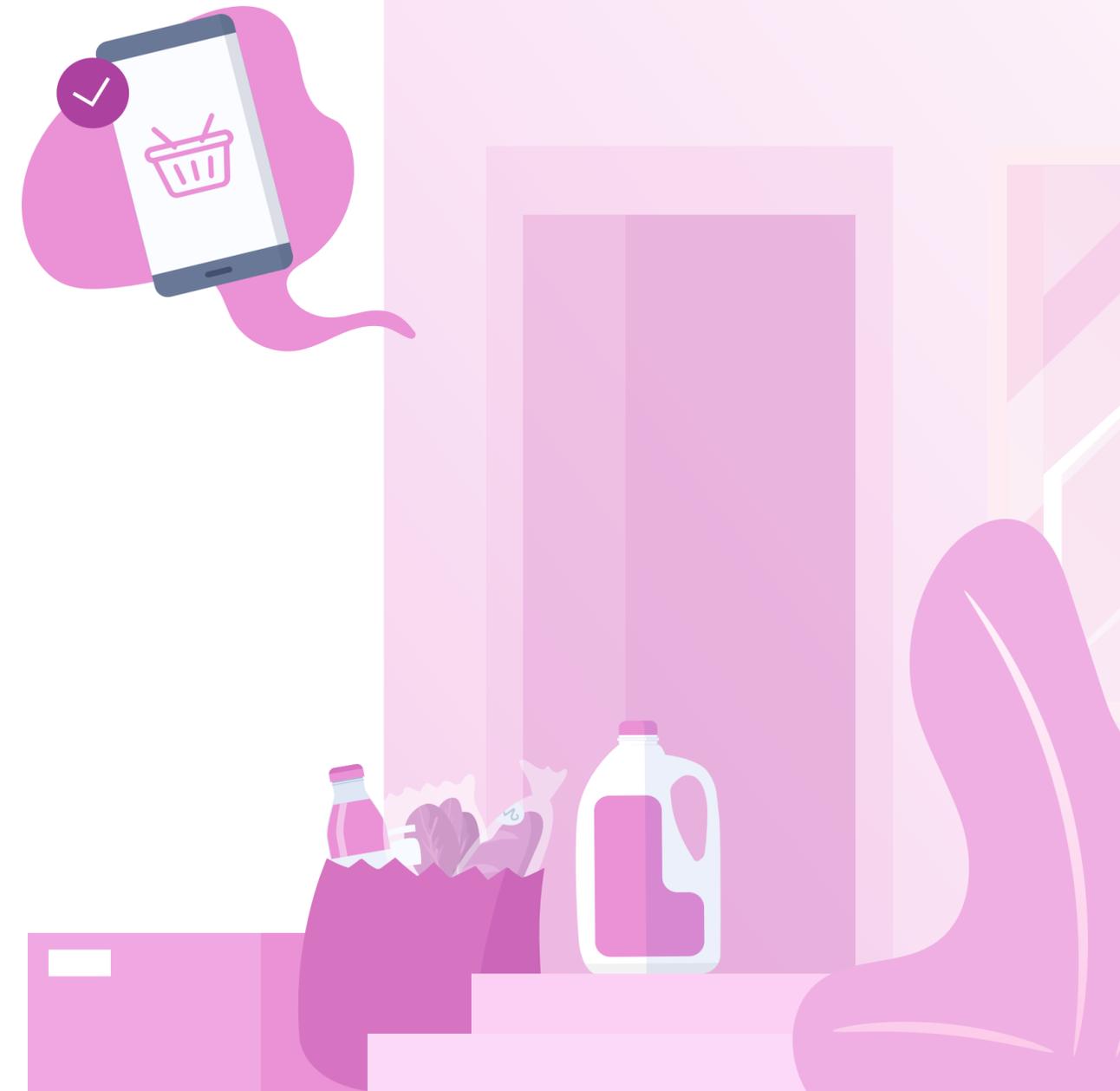
Everyone is focused on agile, which is clearly essential, but a strategic segmentation is a crucial framework for longer-term planning (considering everything from portfolio planning and finding “white space” to media mix).

Habits and attitudes have had their biggest ever peacetime shock, so your old segments are likely redundant. A strategic segmentation built on a dynamic research source could be the answer.

5. Make sure you're digitally effective.

Are the audiences you are buying dependable? Are you in danger of losing the muscle you had built up in traditional commerce?

*Sandy Livingstone, Senior Sales Director,
Corporate at GWI*



5 key takeaways for sports brands

1. Be prepared for continued change.

Pure guesswork isn't good enough. Get access to the best, most up-to-date consumer data to ensure you're fully prepared for what the future holds.

2. Fans should be central to all business decisions.

Never forget that you're only as good as your fans - after all, they're the ones voluntarily investing their time and money.

3. Be creative and continue to go above and beyond for all your partners.

Going the extra mile will set you apart and show that you didn't shrink away during the global crisis, but stayed present and strong in the face of opposition.

4. Reflect and evolve as a business to develop stronger foundations for the future.

The pandemic is the ultimate time to reflect and forge a new path for sport. Make the most of it.

5. Embrace live sport as it returns and the joy it can bring to people in continued times of uncertainty.

Few sectors bring as much light into people's lives as sport does, and it's a great opportunity to improve consumers' day-to-day and communicate with them.

David Melia, Head of Sports at GWI

04

**Reinforce
connections,
revive the demand**

ROAD TO RECOVERY

2020 will certainly be remembered as a tragic, strange and life-changing time. And with so much uncertainty, it's more important than ever to learn and adapt.

While it may seem obvious, customers are adjusting to tremendous changes and accepting you might not know them as well as you did is the first step towards reforging deep relationships.

Using granular, regularly-harnessed data is one way to take back that control - putting your spend where it counts and keeping your customers loyal until life slowly gets back to normal.

With your limitations accepted, and new opportunities revealed, you can use granular consumer data to begin filling in the gaps, reorienting your business strategy to add new value to consumers in the 'next normal'.

See the data in action

Learn how to gather the insights that matter,
guided by one of our platform experts.

[Book a demo](#)

Looking for insight into your U.S. consumers?

GWI USA asks the questions no one else is asking, so you can really get to grips with your audience.

[Find out more](#)