

**GLOBAL
CONSUMER
TRENDS**

COVID-19 EDITION | THE NEW NORMAL

OUR CHANGING WORK LIVES



As many governments and businesses consider reopening and we settle into our COVID-19-influenced world, Dynata is focused on identifying the new consumer trends across 11 countries. Our report, Global Consumer Trends COVID-19 Edition: *The New Normal*, explores which of these changed trends might be temporary, and which could become permanent. This brief identifies the changes we're seeing in how (and where) we work, and what people are doing to get back to work if they have lost their jobs because of COVID-19. What do brands need to know to stay ahead and meet the emerging wants and needs of consumers?

EXECUTIVE SUMMARY

The COVID-19 pandemic has transformed every aspect of our lives, but one of its most dramatic and profound impacts has been on people's working lives. Whether they are still employed but working in a different style or location or have lost their jobs during the pandemic and are taking steps to get back to work with new skills and in new industries, we all have a New Normal when it comes to our working lives.

In looking at our data, there are three indicators that offer clues to our New Normal of working:



MAJORITY ARE WORKING FROM HOME NOW AND FEEL PRODUCTIVE

75% report doing so at least some of the time; just under two thirds report they are just as, if not more, productive at home than they were in the office.



PEOPLE ARE NOT GOING BACK

Most people prefer to continue to work from home in the future at least some of the time, regardless of how productive they feel.



NEWLY-UNEMPLOYED INDIVIDUALS ARE FOCUSED ON GETTING BACK TO WORK

Those who lost their jobs during the pandemic are being proactive, learning new skills or a new trade, and considering career changes or even starting their own companies.

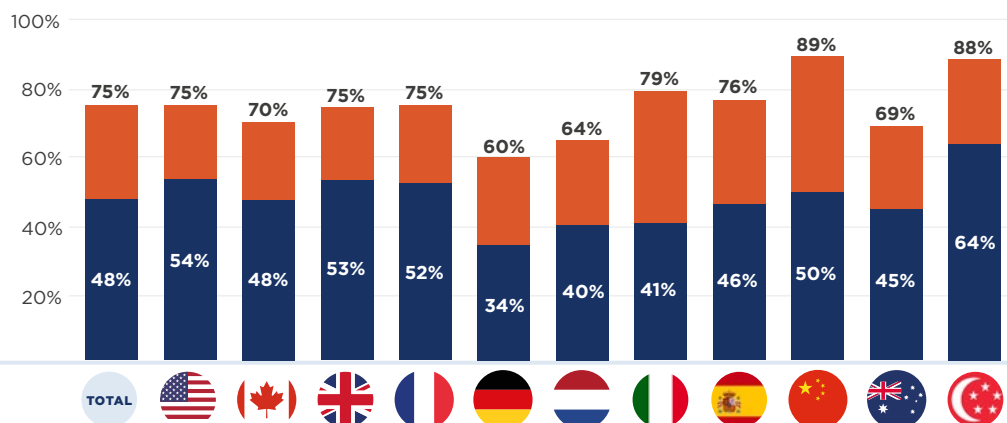
OUR CHANGING WORK LIVES

The impact of COVID-19 on people's working lives has been dramatic. In our latest Global Consumer Trends COVID-19 Edition: *The New Normal*, we saw considerable variation by country, as well as by age and income, on just how dramatic the changes have been.

The biggest change has been in how many people are now working from home - 75% globally report they are working from home at least some or all the time. Our data, shown below, demonstrates the prevalence of working from home in the COVID-19 economy. Of note, Germany reports the lowest work-from-home rate, at 60%, while China reports the highest rate at 89%.

Dramatic increase in people working from home since start of pandemic

- All the time
- Some of the time

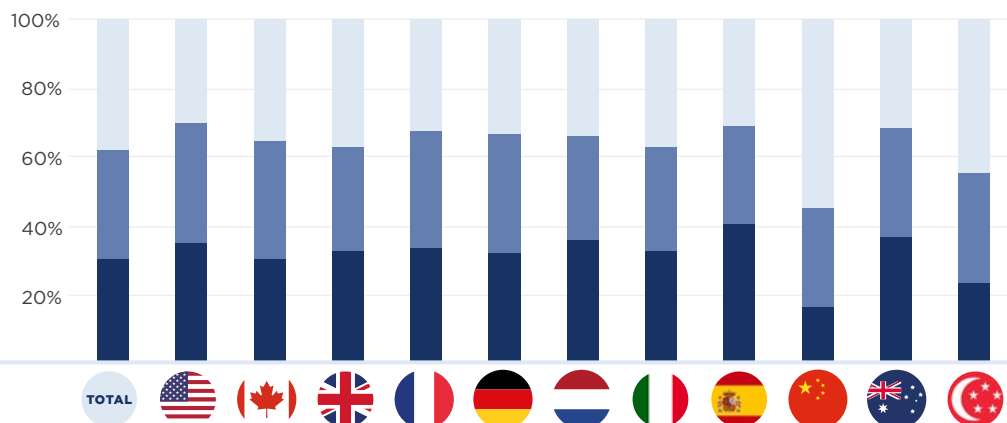


With so many people working from home, will we ever return to the office? And furthermore, what do brands and companies need to know in order to meet the wants and needs of COVID-19-influenced consumers and employees?

These questions become even more important when you consider that those working from home report they are just as, if not more, productive than when they are in the office. Across the 11 countries we studied, nearly two thirds of people agree with this, with Americans demonstrating the highest opinion of their work-from-home productivity.

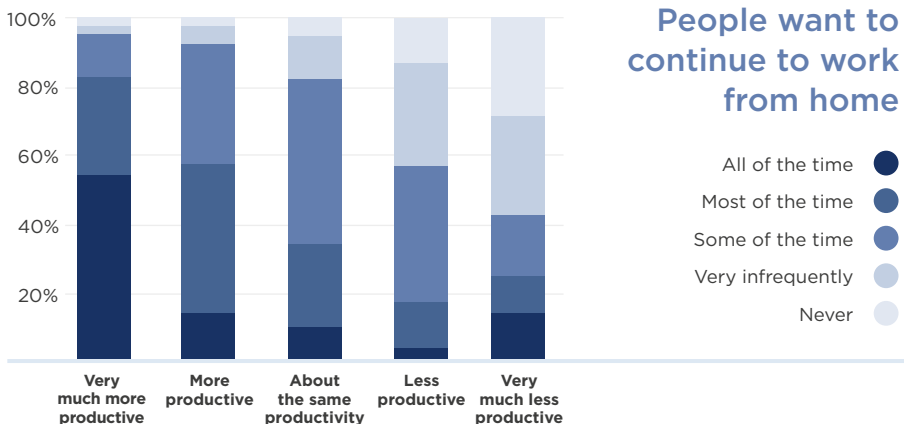
How productive are you when working from home vs. working in an office?

- More
- Same
- Less



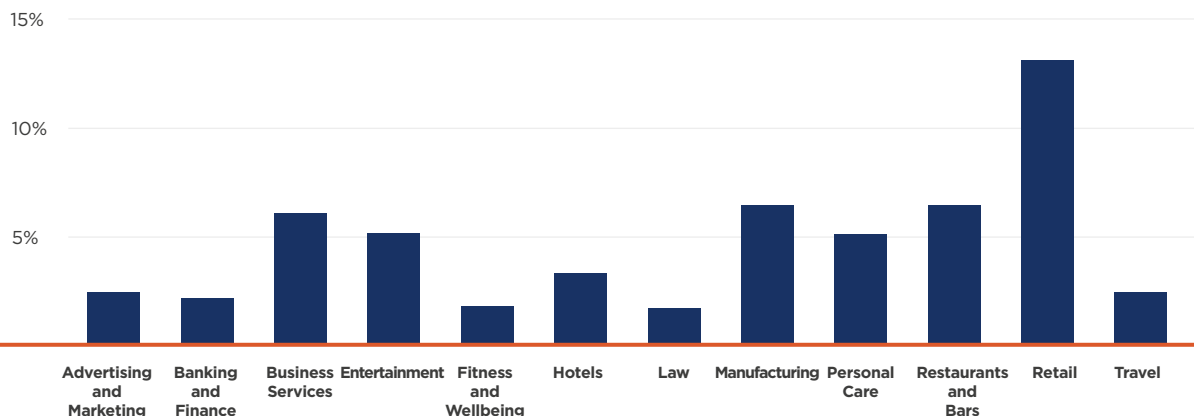
Enthusiasm for transitioning to a work-from-home approach in the future, at least some of the time, is consistent across all attitudes and cohorts. Overall, the benefits of working from home don't appear to be limited "just" to those who report high levels of productivity. Even those who don't feel as productive want to continue working from home.

Younger generations report the highest level of at-home productivity and are more likely to want to work from home in the future. But even on the low end of the scale, 34% of Baby Boomers still want to work from home all or most of the time, compared to 41% of Millennials. All of this could be further evidence of this trend's long-term staying power.



Alongside those of us working from home, there is a growing cohort of people who have lost their jobs because of COVID-19-influenced factors and the resulting shrinking economy. These factors include less foot traffic to restaurants and retail stores, reduced travel and hotel bookings, and the closing of gyms and health clubs, among other consequences. Not surprisingly our data shows the retail sector has been hit hardest by COVID-19 layoffs.

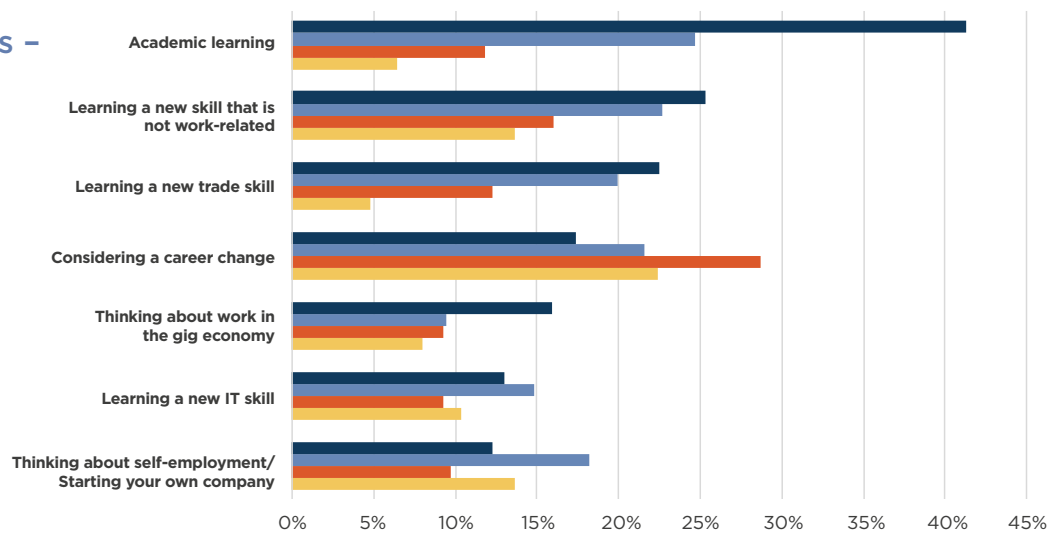
Sectors hit hardest by COVID layoffs



Those recently unemployed don't appear to be sitting idle, however; they are "leaning in" to returning to work, regardless of generation. With recovery for many industries likely to be slow, and long, many of the recently unemployed are focused on going back to school, learning a new skill, changing careers or starting their own company, among other options.

Return to work plans - demographic view

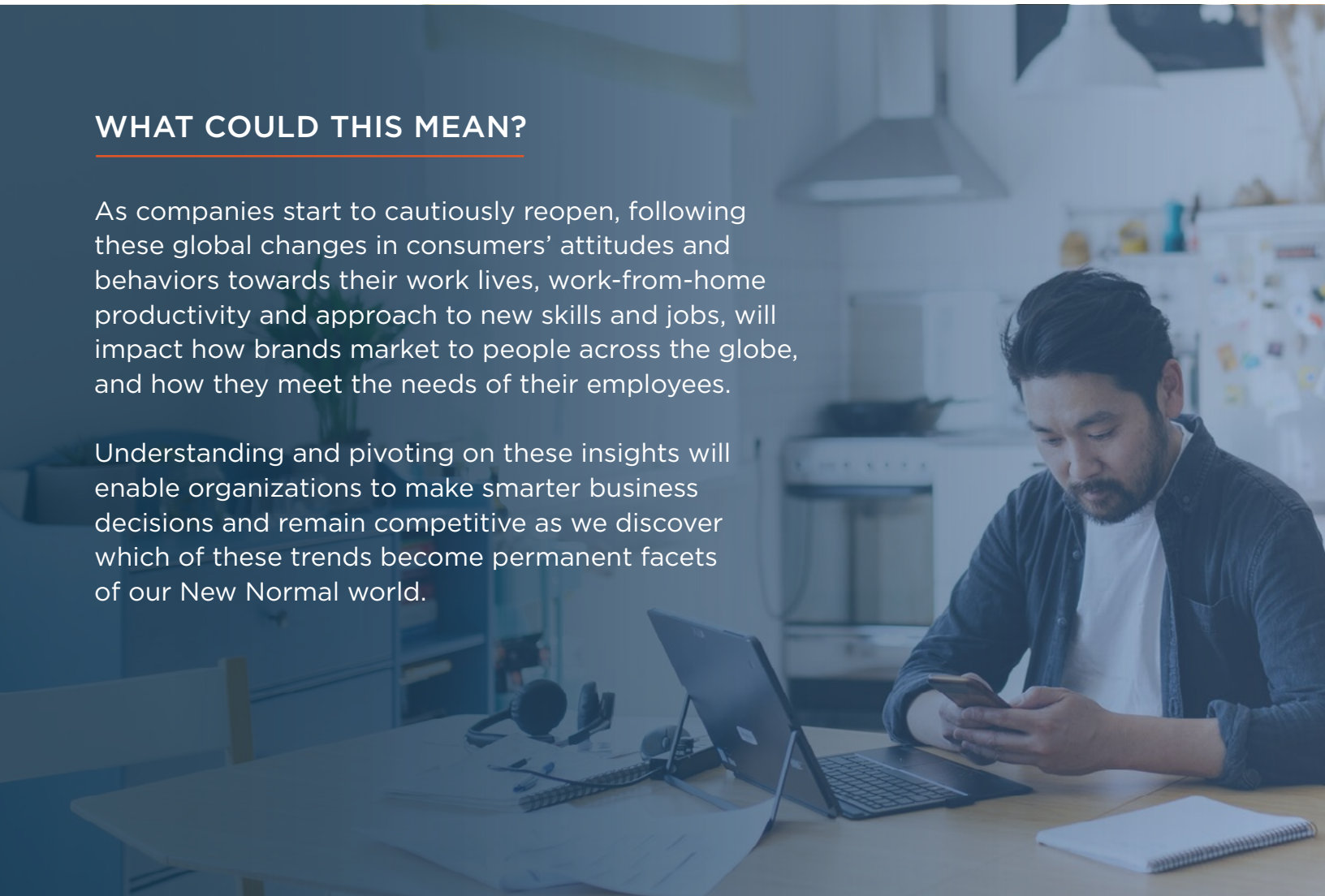
- Gen Z
- Millennial
- Gen X
- Baby Boomer



WHAT COULD THIS MEAN?

As companies start to cautiously reopen, following these global changes in consumers' attitudes and behaviors towards their work lives, work-from-home productivity and approach to new skills and jobs, will impact how brands market to people across the globe, and how they meet the needs of their employees.

Understanding and pivoting on these insights will enable organizations to make smarter business decisions and remain competitive as we discover which of these trends become permanent facets of our New Normal world.





SOME POSSIBLE IMPENDING IMPACTS TO CONSIDER AS WE LOOK AT THIS SHIFT:

How will these trends change the future of work models? Will it impact the commercial real estate industry?

As more people embrace a work-from-home model, will companies still invest in full office space? For example, distributed workforces could mean only half an organization's employees requires an external office environment, so investment in full office space might not be necessary.

Fewer visits to the office could lead more organizations to consider the utilization of shared workspaces or work hubs.

How will it impact on urban planning?

Fewer office visits might mean new terms for office leasing, fewer cars on the road, or perhaps even a drop in public transportation usage. These types of "second order" effects could extend the impact of more people working from home into other parts of our daily lives.

And will we need to redefine concepts of collaboration, teamwork and the classic office environment?

Many collaboration and communication technologies, such as Slack, WebEx, Microsoft Teams, and Zoom – could continue to see a boost in usage, along with greater investments in the technology infrastructure required to support the bandwidth needed when we are all online.

Will providers of online training and learning see a boost in subscribers/students?

One in five newly-unemployed people report they are learning a new trade skill, while only slightly fewer are learning new IT skill.

Could the gig economy become an option for more people looking to return to work?

Our data shows that 17% of the newly unemployed are considering joining its ranks.

With so many people motivated to take control of their future employment, could start-ups and new industries chart the path toward economic recovery?

Those newly unemployed workers report that they are also thinking about career changes (32%) or starting their own company (18%).

For continued coverage of the latest global consumer trends, and additional insights on what these trends reveal about our New Normal, visit our [COVID-19 Insights Hub](#) and download the full report.



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