GLOBAL CONSUMER TRENDS

NEW LIVES IN A NEW WORLD

dynata™

EXECUTIVE SUMMARY

Global Consumer Trends: New Lives in a New World

More than a year into the Coronavirus pandemic, the changes to our daily lives are obvious – in the ways we work, we live and spend. Whether it's spending more time working from home, adopting lifestyle changes and habits that prioritize physical and mental health, or putting money towards home improvement, it's clear that so much of what used to be important has shifted, creating a new way of life that is, in many ways, profoundly different from our pre-COVID lives.

What's less clear, however, is whether these new patterns are indications of a permanent change in our priorities – adapted to the behaviors, habits and practices in our lives at home and in the workplace – or are temporary responses to policies and rules mandating social distancing and travel or office-opening restrictions. Yet while it may be too soon to tell, it's apparent that the reshuffling of professional and personal priorities has produced a better and more productive and fulfilling life for some, while for others the urge to go back to "the way it used to be" is strong.

Dynata's newest report in the Global Consumer Trends research series – *Global Consumer Trends: New Lives in a New World* – explores this topic, looking at the changes to our working, personal and spending habits and documenting which ones are likely to return to pre-COVID behaviors and which will continue as part of our new COVID-changed worlds. Using responses from more than 11,000 consumers across 11 countries – including the US, Canada, the UK, France, Spain, Germany, Italy, the Netherlands, China, Japan and Australia – Global Consumer Trends: New Lives in a New World examines new work styles, habits and practices, including feelings on working from home more often (and plans to continue doing so), virtual meetings and "Zoom Fatigue," and opinions on the necessity of business travel. It also looks at how the pandemic changed our home and personal lives and shed new light on efforts to prioritize our mental and physical health, with plans to keep doing so. Finally, the report explores changes in our spending habits, and what that might mean for future shopping behaviors and travel plans.

METHODOLOGY STATEMENT

Dynata's Global Consumer Trends: New Lives in a New World survey covered the USA, Canada, the UK, France, Spain, Germany, the Netherlands, Italy, China, Japan and Australia from May 11-18, 2021. Participants were selected across all Dynata's research panel assets, and the samples quota-controlled to reflect the population on Age, Gender and Region. Generations were broken out as follows: Gen Z - age 16-24; Millennial - 25-39; Gen X - 40-55; Baby Boomer - 56-74; and Silent - 75+. Sample sizes were USA (1,000), Canada (1,000), UK (1,000), Spain (1,000), France (1,002), Germany (1,000), The Netherlands (1,000), Italy (1,000), China (1,001), Japan (1,000) and Australia (1,000) – Total 11,003. The margin of error (at the 95% confidence level) is +/- 3% at the country level, +/-1% at the total level.

KEY FINDINGS

SECTION 1

NEW LIVES

The pandemic has led to a shift in people's priorities towards health, family and personal well-being, and away from materialism.

- The pandemic allowed people to slow down – and they don't want to give this up
- People are ready to move on from virtual experiences - classes, non-work meetings, and remote schooling
- The pandemic inspired younger generations toward generosity and big life decisions
- People value family time and self-care more than before the pandemic

Americans are most opposed to getting the vaccine; globally, women and younger generations are most hesitant to get vaccinations.

People believe life will never go back to the way it was yet are still eager to do what they did before – travel, connect with others, go out on the town, and hit the gym.

SECTION 2

NEW WAYS OF WORKING

Majority of working people expect their work life will stay as it is now, and those enjoying the newer "perks" of this life – such as flexible hours, dressing down and not having to commute – want to keep them.

- The pandemic inspired a shift toward remote work
- Some struggle with longer hours, but more feel that work-life balance has improved
- Some workers are seriously considering a job or career change, especially younger generations

SECTION 3

TRAVEL & SPENDING

Consumers are ready to vacation, preferably domestically.

- Cars are the main choice for transportation for upcoming vacations, and beaches the most popular destination
- COVID concerns are the main barrier to travel, but money is also a factor

Business travelers are ready to start getting back on the road, and feel most comfortable with regional travel by car.

Meanwhile, more time at home led to increased reliance on online services for shopping and running errands – and people plan to keep doing this.

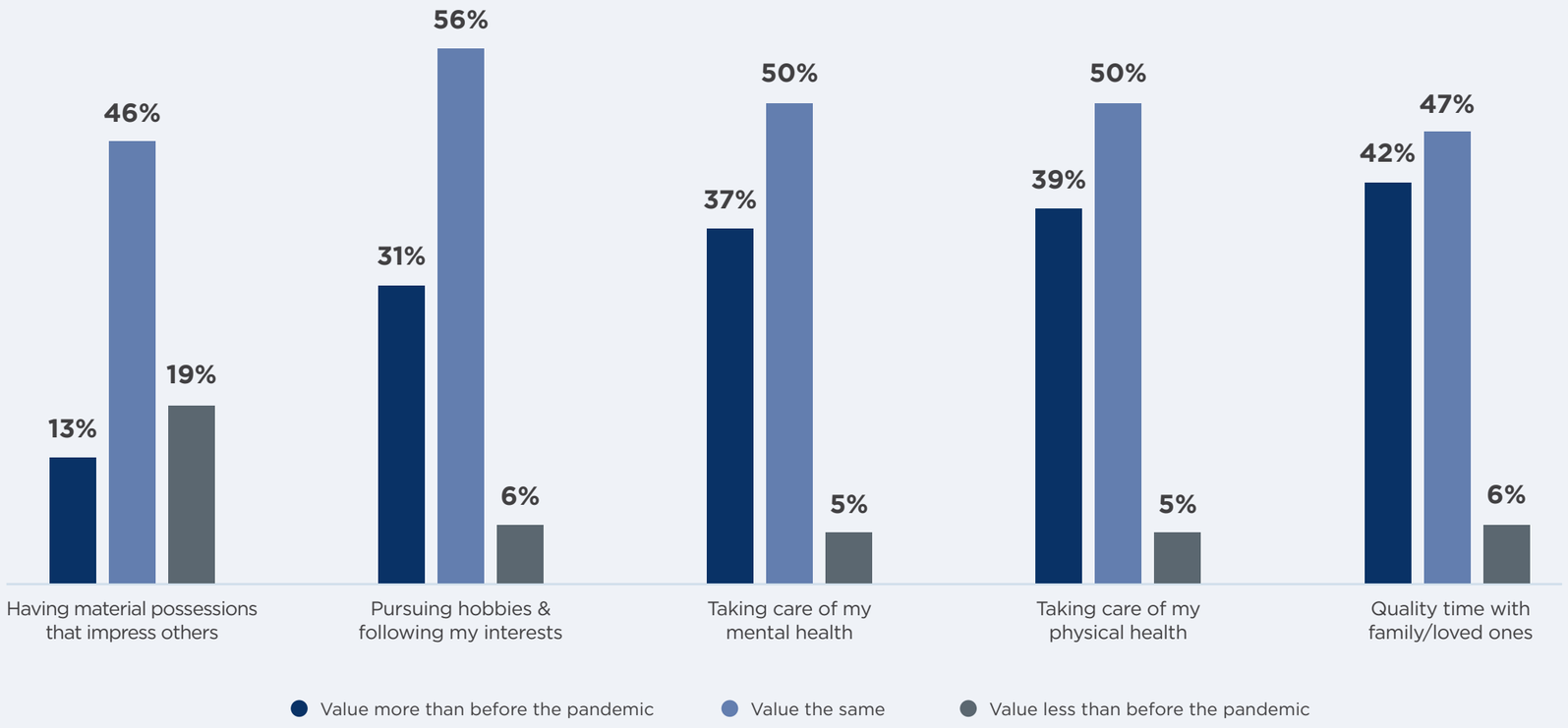
- With more time at home, people spent on home improvement & furnishings

NEW LIVES

THE PANDEMIC HAS LED TO A SHIFT IN PEOPLE'S PRIORITIES TOWARDS HEALTH, FAMILY AND PERSONAL WELL-BEING, AND AWAY FROM MATERIALISM

WHAT'S MORE IMPORTANT TODAY VS. PRE-PANDEMIC

% people value more, the same or less



Compared to before the pandemic, people place more value on quality time with loved ones, taking care of their physical and mental health, and pursuing interests.

1 in 5

place less value on material possessions.

THE PANDEMIC ALLOWED PEOPLE TO **FOCUS ON THEIR HEALTH, FAMILIES AND PERSONAL INTERESTS**

Most people who took better care of their health, exercised and went outside more, enjoyed more family time, and spent more time pursuing interests during the pandemic would like to continue these habits.

ASPECTS OF PANDEMIC LIFE THAT PEOPLE WANT TO CONTINUE

Among those who did these things during the pandemic

TAKING BETTER CARE OF THEIR HEALTH

81%
Physical health

79%
Mental health

MORE TIME FOR EXERCISE AND THE OUTDOORS

78%
Exercise

79%
Being outside/ in nature

SEEING THEIR FAMILIES MORE

75%
More time with immediate family

MORE TIME TO PURSUE INTERESTS

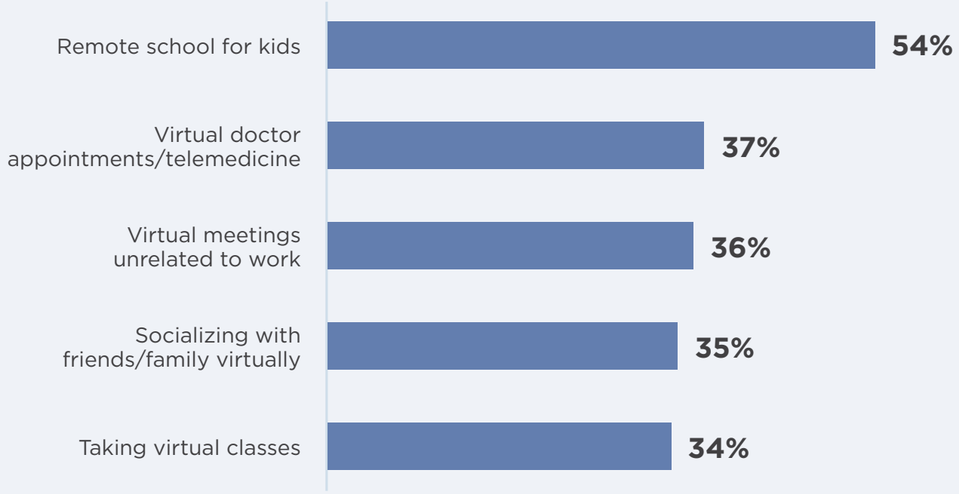
77%
Hobbies

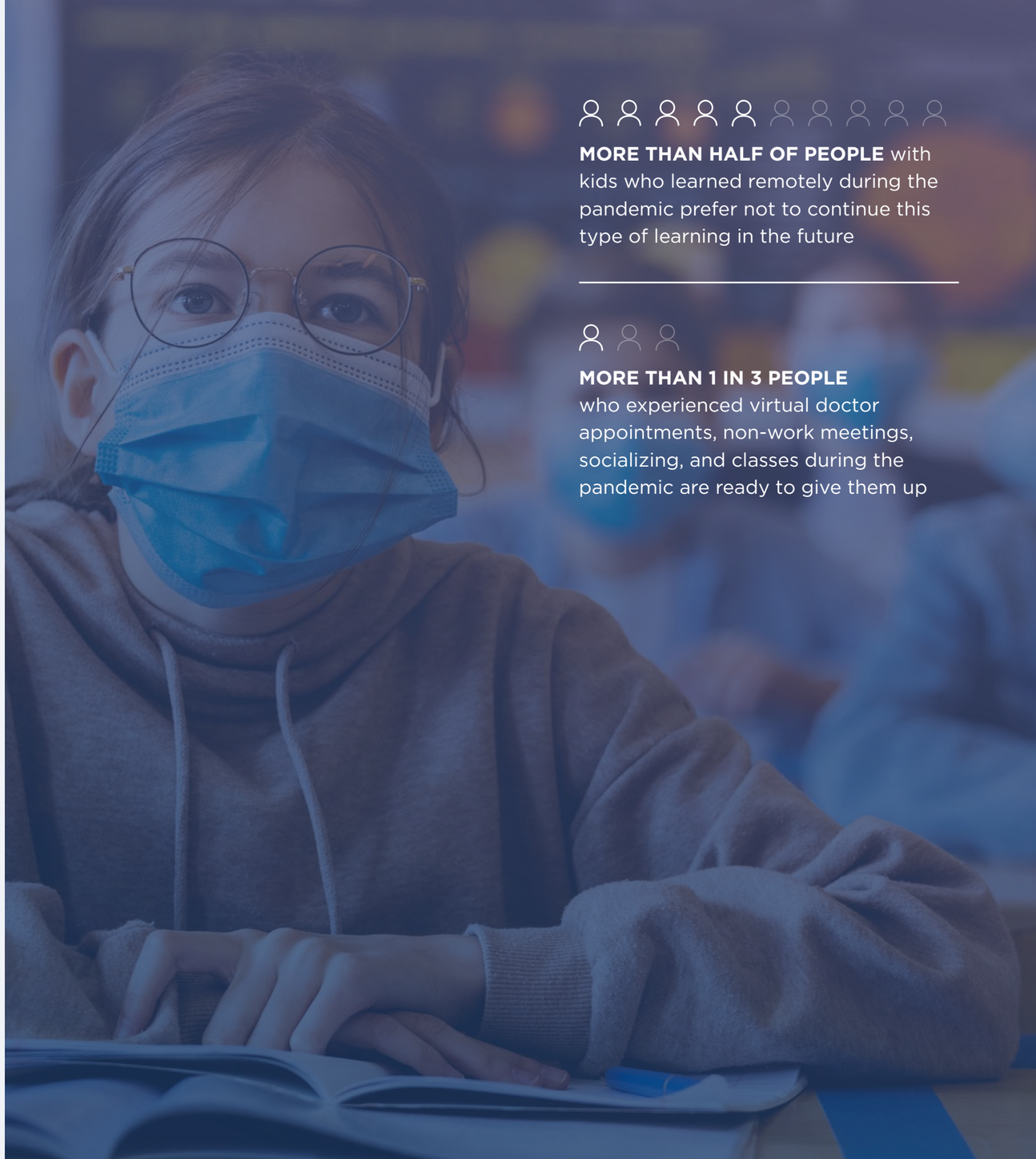
64%
Cooking

PEOPLE ARE READY TO MOVE ON FROM VIRTUAL EXPERIENCES INCLUDING CLASSES, NON-WORK MEETINGS, AND REMOTE SCHOOLING

ASPECTS OF PANDEMIC LIFE THAT PEOPLE **DON'T** WANT TO CONTINUE

Among those who did these things during the pandemic

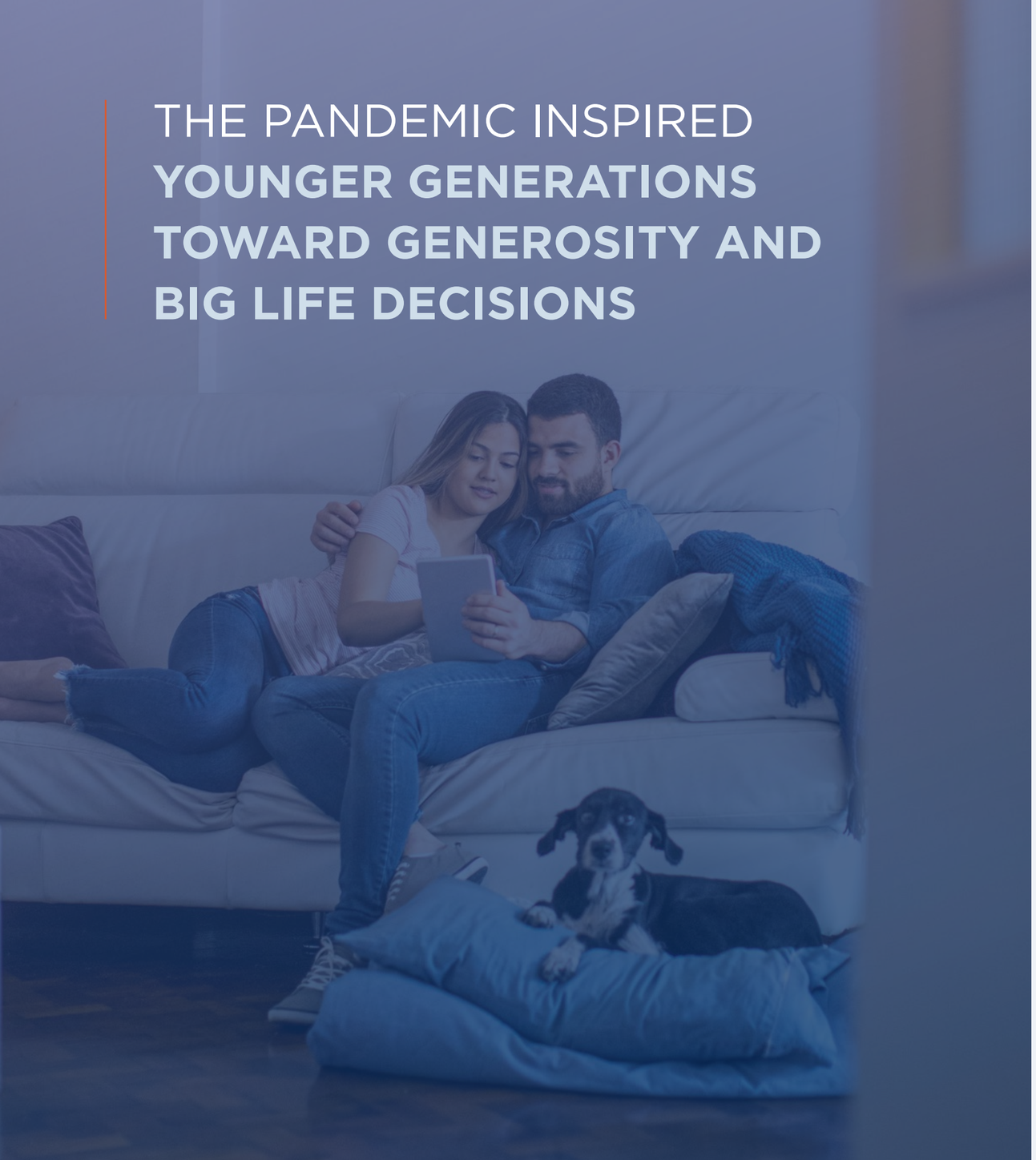




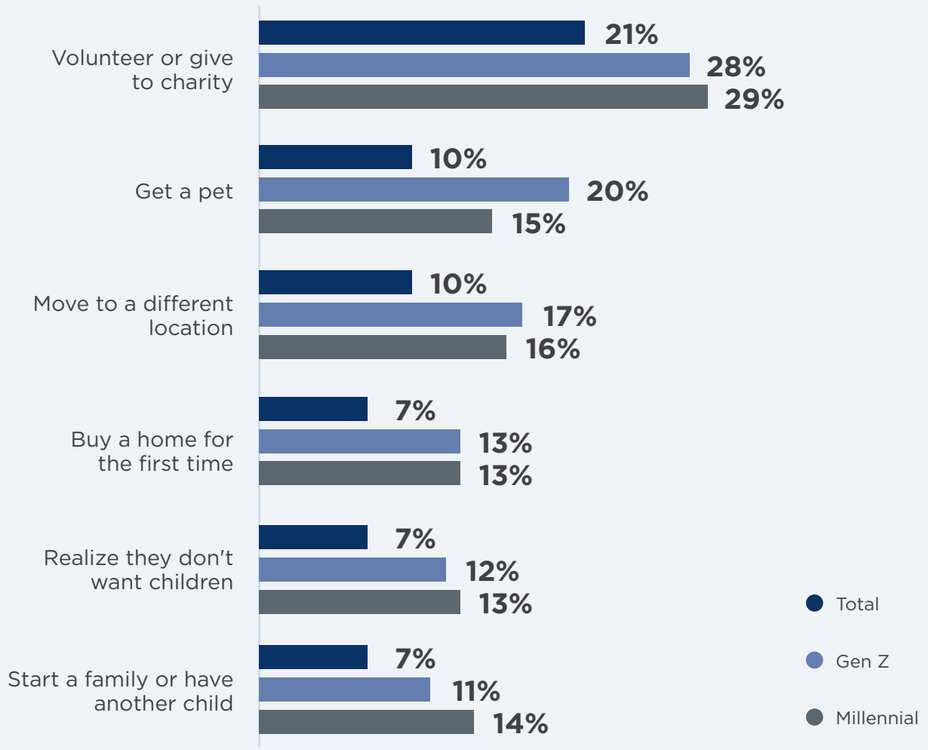
MORE THAN HALF OF PEOPLE with kids who learned remotely during the pandemic prefer not to continue this type of learning in the future

MORE THAN 1 IN 3 PEOPLE who experienced virtual doctor appointments, non-work meetings, socializing, and classes during the pandemic are ready to give them up

THE PANDEMIC INSPIRED **YOUNGER GENERATIONS TOWARD GENEROSITY AND BIG LIFE DECISIONS**



THE PANDEMIC INSPIRED PEOPLE TO...



More so than other generations, the pandemic motivated Gen Z and Millennials to volunteer or give to charity, get a pet, move, or make decisions about having children

AMONG THE UNVACCINATED, AMERICANS ARE MOST OPPOSED TO GETTING THE VACCINE; GLOBALLY, WOMEN AND YOUNGER GENERATIONS MOST VACCINE-HESITANT

GLOBALLY, **57% OF UNVACCINATED PEOPLE PLAN TO GET THE VACCINE** AND **26% AREN'T SURE**

WOMEN ARE MORE VACCINE-HESITANT THAN MEN.

53%

of unvaccinated **women** plan to get the vaccine

62%

of unvaccinated **men** plan to get the vaccine

MANY UNVACCINATED PEOPLE PLAN TO STAY THAT WAY – WITH AMERICANS AT THE FOREFRONT

% OF UNVACCINATED PEOPLE WHO DO NOT PLAN TO GET THE VACCINE

GLOBAL				
18%	**46%**	27%	21%	20%

PEOPLE BELIEVE **LIFE WILL NEVER GO BACK TO THE WAY IT WAS...**

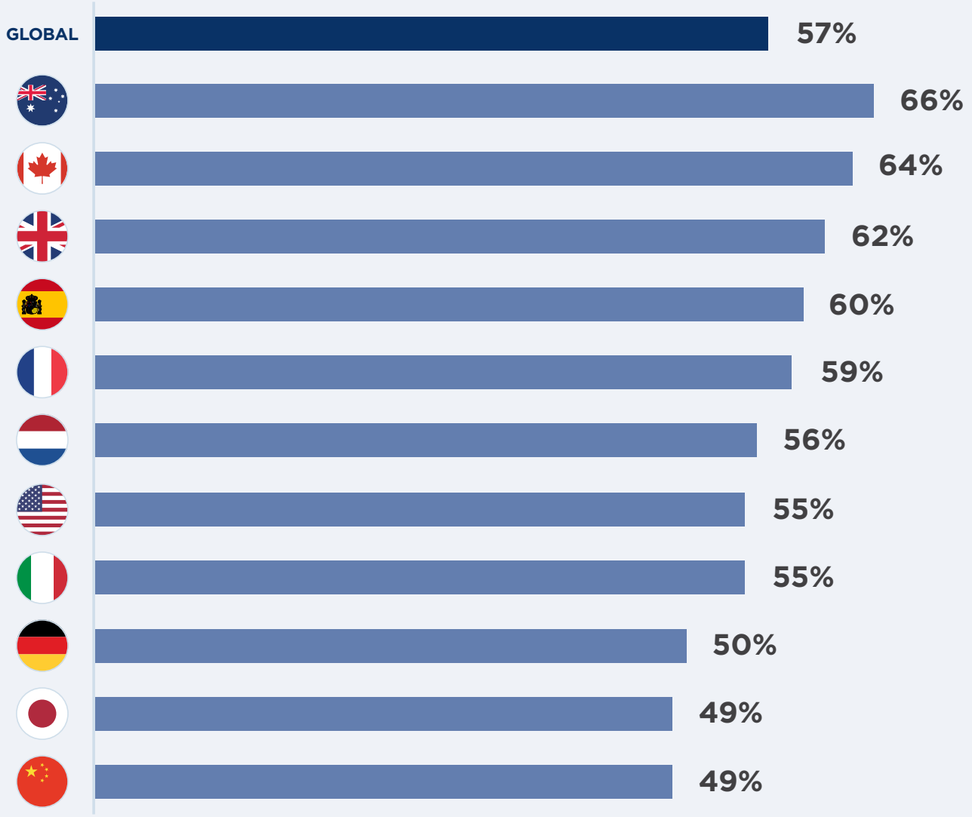
96%

OF PEOPLE GLOBALLY REPORT THAT THEIR LIVES HAVE CHANGED BECAUSE OF THE PANDEMIC

50% say their lives have changed **'completely'** or **'a lot'**

And while 47% of people feel strongly that it's time to go back to living the way they did before Covid-19, even more (57%) believe that life has changed permanently

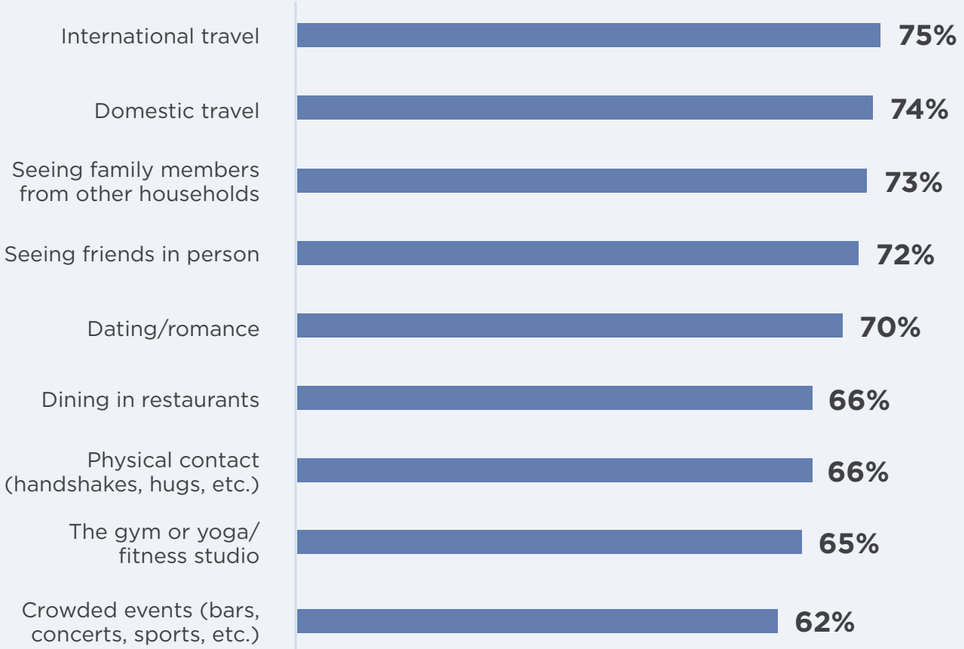
% BELIEVE THAT LIFE WILL NEVER BE THE SAME AS IT WAS BEFORE THE PANDEMIC



YET PEOPLE ARE STILL EAGER TO DO WHAT THEY DID BEFORE – TRAVEL, CONNECT WITH OTHERS, GO OUT ON THE TOWN, AND HIT THE GYM

WHAT PEOPLE ARE EXCITED TO RETURN TO

Among those who did these things before the pandemic

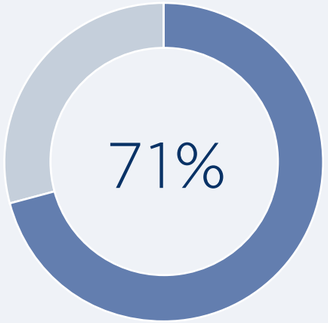


As more people are vaccinated and social restrictions continue to ease, many of us are eager to get out into the world – **how can restaurants, gyms and live venues prepare for the increasing demand?**

NEW WAYS OF WORKING

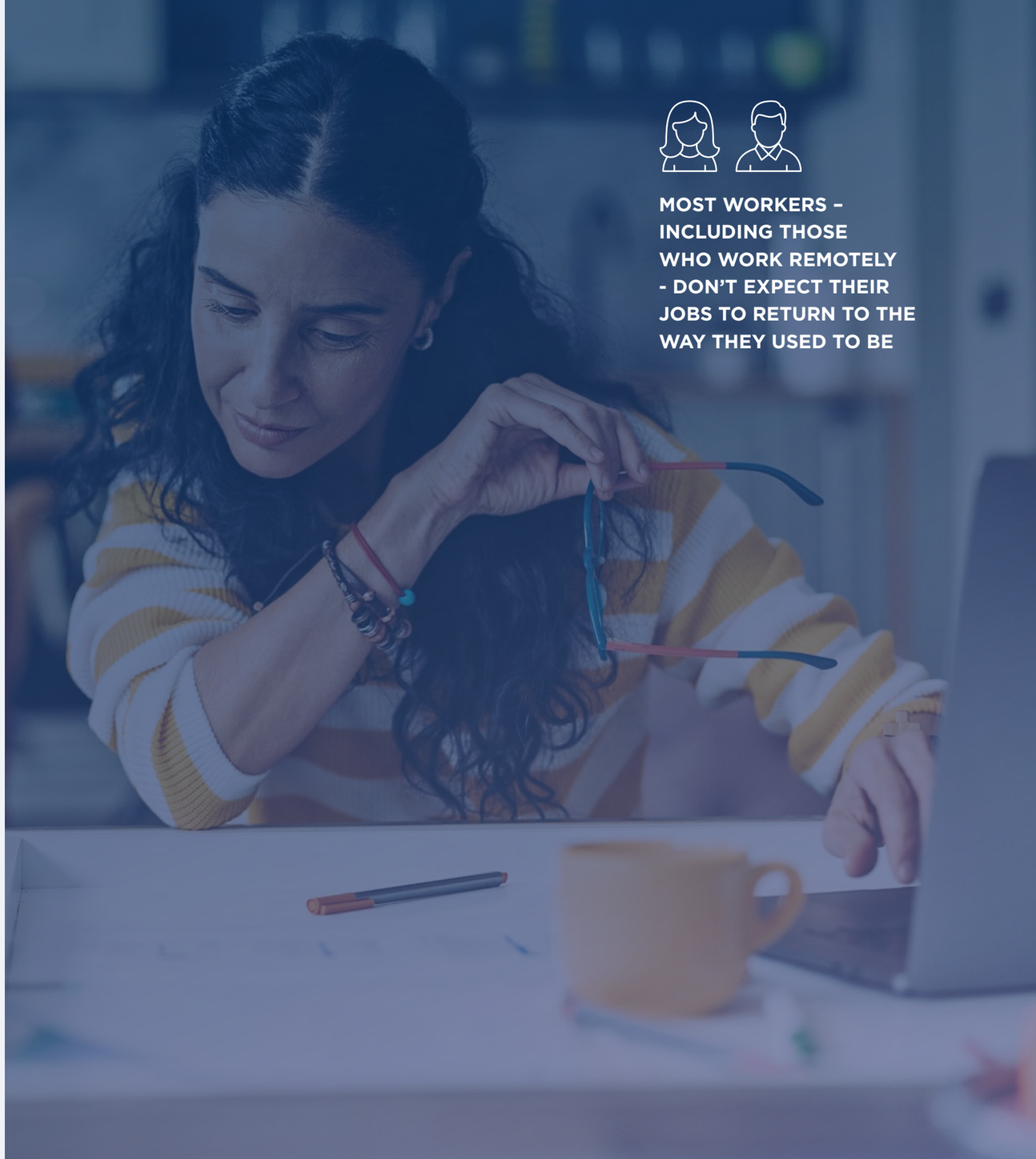
THE MAJORITY OF WORKING PEOPLE EXPECT THEIR WORK LIFE WILL STAY AS IT IS NOW

Looking a year into the future...



of employed people think their working lives will be more like today than pre-pandemic conditions

68% of remote workers



MOST WORKERS – INCLUDING THOSE WHO WORK REMOTELY - DON'T EXPECT THEIR JOBS TO RETURN TO THE WAY THEY USED TO BE

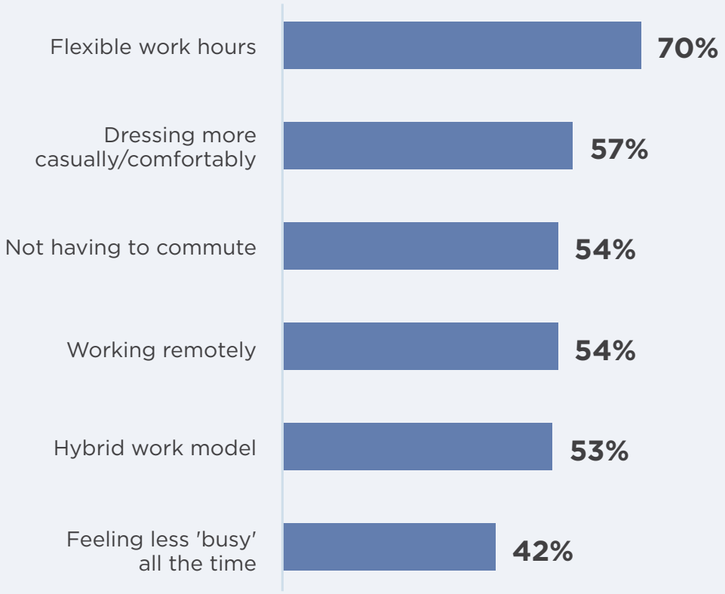
THOSE ENJOYING THE NEWER "PERKS" OF WORK INSPIRED BY THE PANDEMIC – SUCH AS FLEXIBLE HOURS, DRESSING DOWN AND NOT HAVING TO COMMUTE – WANT TO KEEP THEM

WHAT WORKERS ARE 'SLIGHTLY' OR 'NOT AT ALL' EXCITED TO RETURN TO

Among those who did these things before the pandemic

WHAT WORKERS 'DEFINITELY' OR 'PROBABLY' WANT TO CONTINUE

Among those who did these things during the pandemic



MORE THAN 3 IN 10 WORKERS who had long commutes, were required to be in the workplace daily, had formal dress codes, and fixed schedules before the pandemic are not eager to return to these habits.

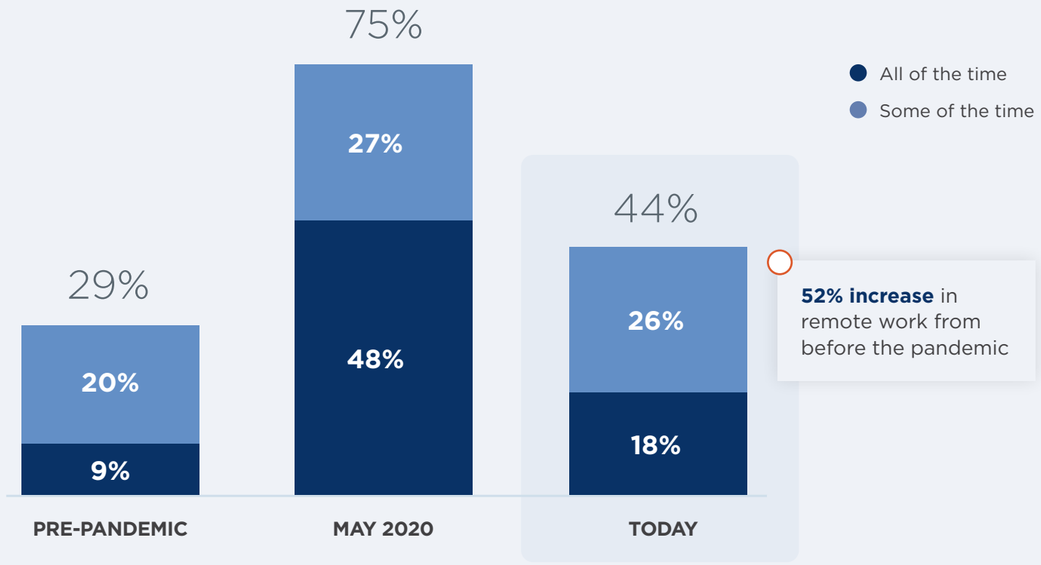
Those who had flexible hours, more casual dress, no commute, the ability to log in from home, and a general feeling of being less "busy" during the pandemic want to maintain these perks.

THE PANDEMIC INSPIRED **A SHIFT TOWARD REMOTE WORK**

50%

Many workers have returned to the office since the height of the pandemic, but **REMOTE WORKERS HAVE INCREASED BY OVER 50% FROM BEFORE THE PANDEMIC BEGAN**

% OF EMPLOYED PEOPLE WORKING REMOTELY



Remote work (full or partial) is...

Most common in:

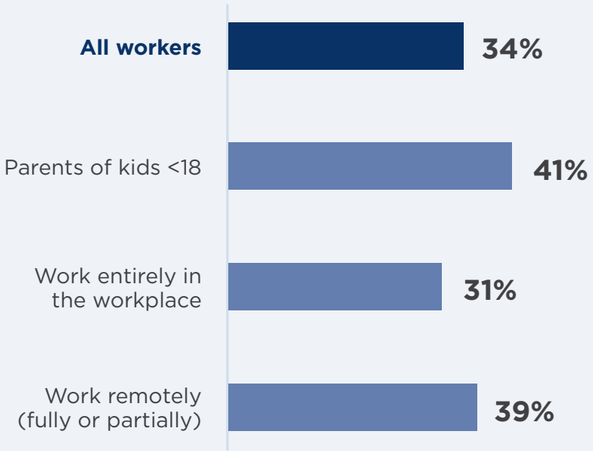
54% 51% 50% 50%

Least common in:

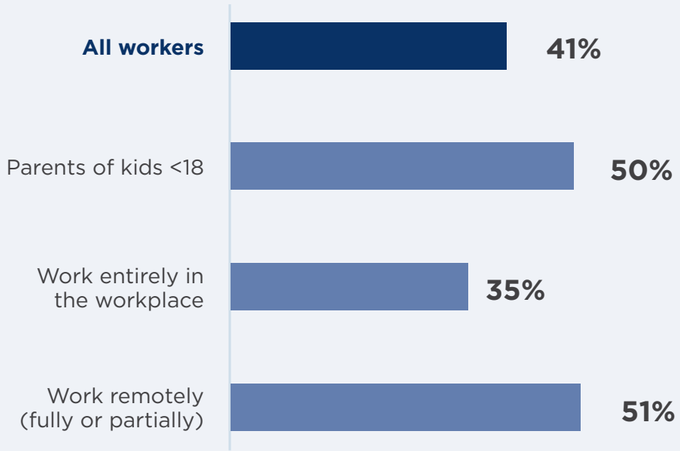
31% 32% 39%

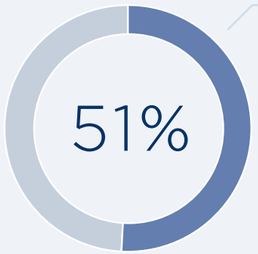
SOME STRUGGLE WITH LONGER HOURS, **BUT MORE FEEL THAT WORK-LIFE BALANCE HAS IMPROVED**

% FEEL THEY ARE WORKING MANY MORE HOURS NOW THAN BEFORE THE PANDEMIC



% FEEL THEY HAVE A MUCH BETTER WORK-LIFE BALANCE NOW THAN BEFORE THE PANDEMIC





of remote workers feel much more productive working from home than in an office

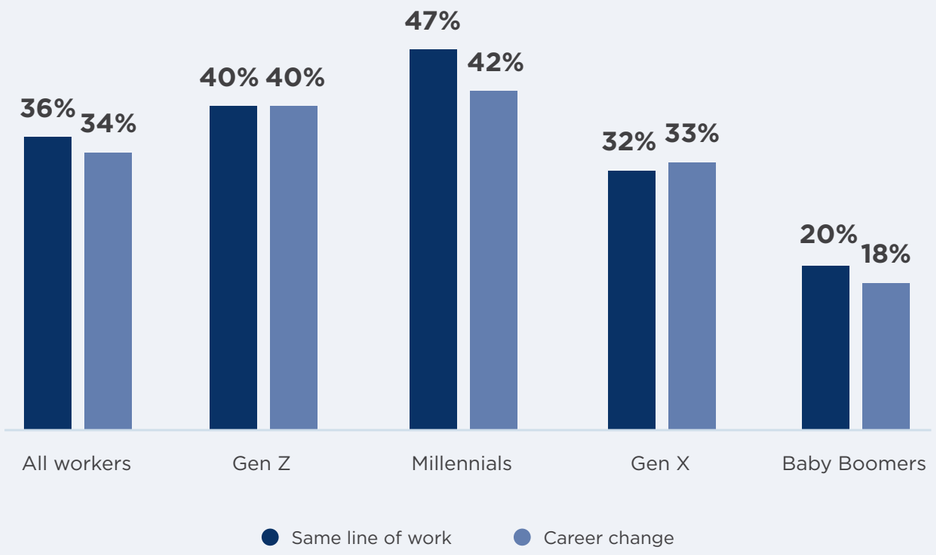
1/3 **OF WORKERS – ESPECIALLY PARENTS AND REMOTE WORKERS –** feel they are putting in much more time now than before the pandemic

For many, however, **WORK-LIFE BALANCE HAS IMPROVED DURING THE PANDEMIC**

As employers ask employees to return to the office, what are the important work-life balance lessons to be learned from the pandemic?

SOME WORKERS ARE SERIOUSLY CONSIDERING A JOB OR CAREER CHANGE, ESPECIALLY YOUNGER GENERATIONS

% VERY INTERESTED IN CONSIDERING A NEW JOB



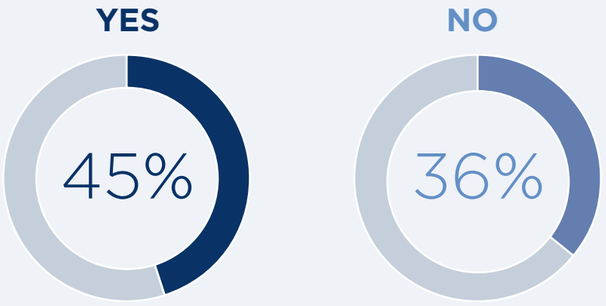
1 in 3

WORKERS – AND MORE AMONG GEN Z AND MILLENNIALS – is considering a new job in their field or a career change

TRAVEL & SPENDING

CONSUMERS ARE READY TO VACATION, PREFERABLY DOMESTICALLY

PLANNING TO TAKE A VACATION/ HOLIDAY IN THE NEXT SIX MONTHS



In the next year, do people think they will travel more, the same, or less than they did in the year prior to the pandemic.

24%
MORE
Gen Z (38%)
Millennials (31%)

49%
SAME AMOUNT

27%
LESS
Baby Boomers (34%)
Silent Generation (33%)

WHERE ARE VACATIONERS GOING IN THE NEXT 6 MONTHS

81%
DOMESTIC TRAVEL

32%
INTERNATIONAL TRAVEL

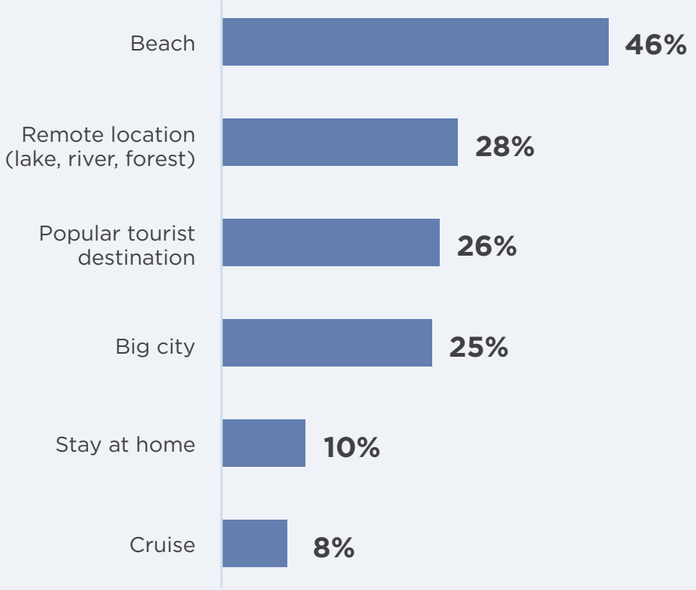
Residents of these countries plan to travel at least as much in the next year as pre-pandemic

86% 82% 79% 79%

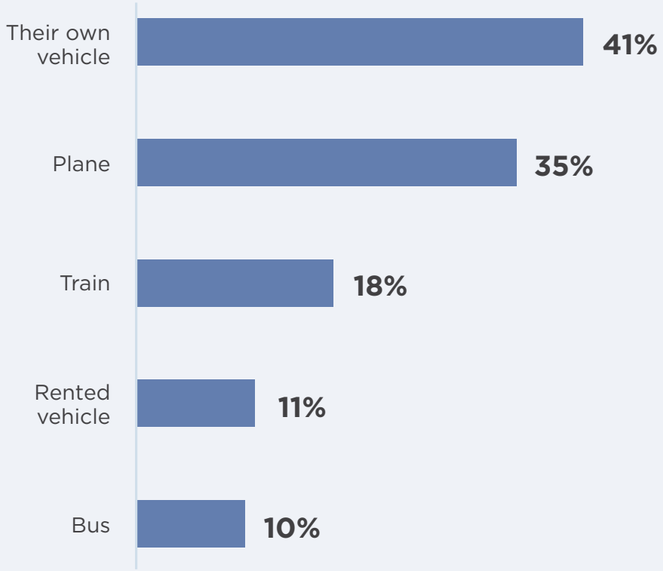
CARS ARE THE MAIN CHOICE FOR TRANSPORTATION FOR UPCOMING VACATIONS, AND BEACHES THE MOST POPULAR DESTINATION

HOLIDAY/VACATION PLANS FOR GLOBAL CONSUMERS IN NEXT SIX MONTHS

DESTINATION CHOICES



TRANSPORTATION PLANS



Where will they stay?

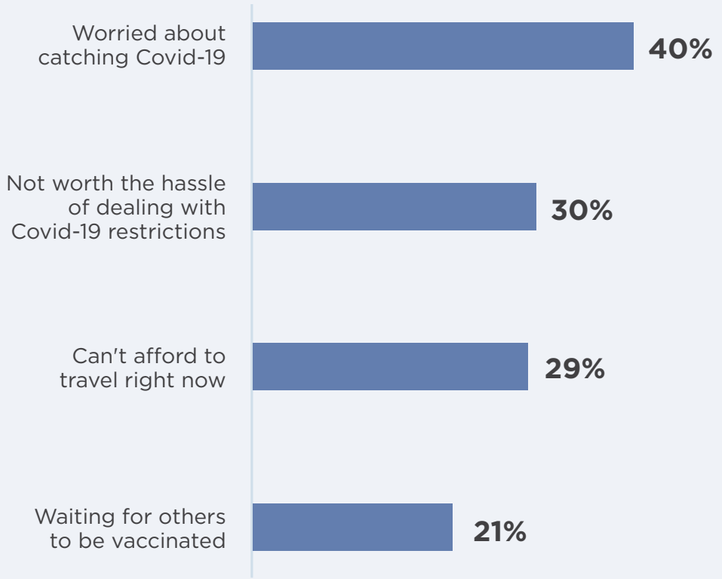
44%
In a hotel

25%
in a short-term apartment/house rental

25%
with friends or family

COVID CONCERNS ARE THE MAIN BARRIER TO TRAVEL, BUT MONEY IS ALSO A FACTOR

WHY PEOPLE WITHOUT VACATION/HOLIDAY PLANS IN THE NEXT 6 MONTHS **DO NOT** PLAN TO TRAVEL



CONSUMERS STILL HAVE CONCERNS ABOUT FLYING AND STAYING IN HOTELS

Just **1 in 3 feel totally safe** traveling by plane

46% 42% 41% 38%

HIGHEST

14% 23% 28%

LOWEST

45% feel totally safe staying in a hotel or short-term house/apartment rental

53% 51% 50% 50%

HIGHEST

26% 37%

LOWEST

BUSINESS TRAVELERS ARE READY TO START GETTING BACK ON THE ROAD, AND FEEL MOST COMFORTABLE WITH REGIONAL TRAVEL BY CAR

How much do people who traveled for business before the pandemic want to travel in the next year?

23%
MORE OFTEN THAN BEFORE

44%
THE SAME AMOUNT

24%
LESS OFTEN THAN BEFORE

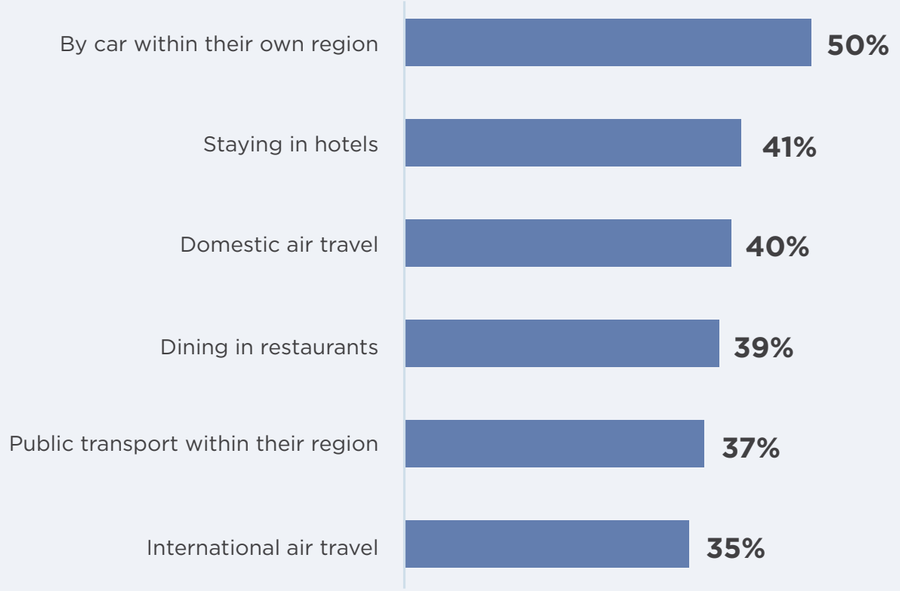
8% **NO LONGER WANT TO TRAVEL FOR BUSINESS**

Those who are vaccinated are most eager to travel

73% **OF VACCINATED BUSINESS TRAVELERS** want to get on the road at least as much as before, compared with **61% OF THOSE WHO ARE UNVACCINATED**

Few options feel totally safe, with the highest comfort level around regional travel by car

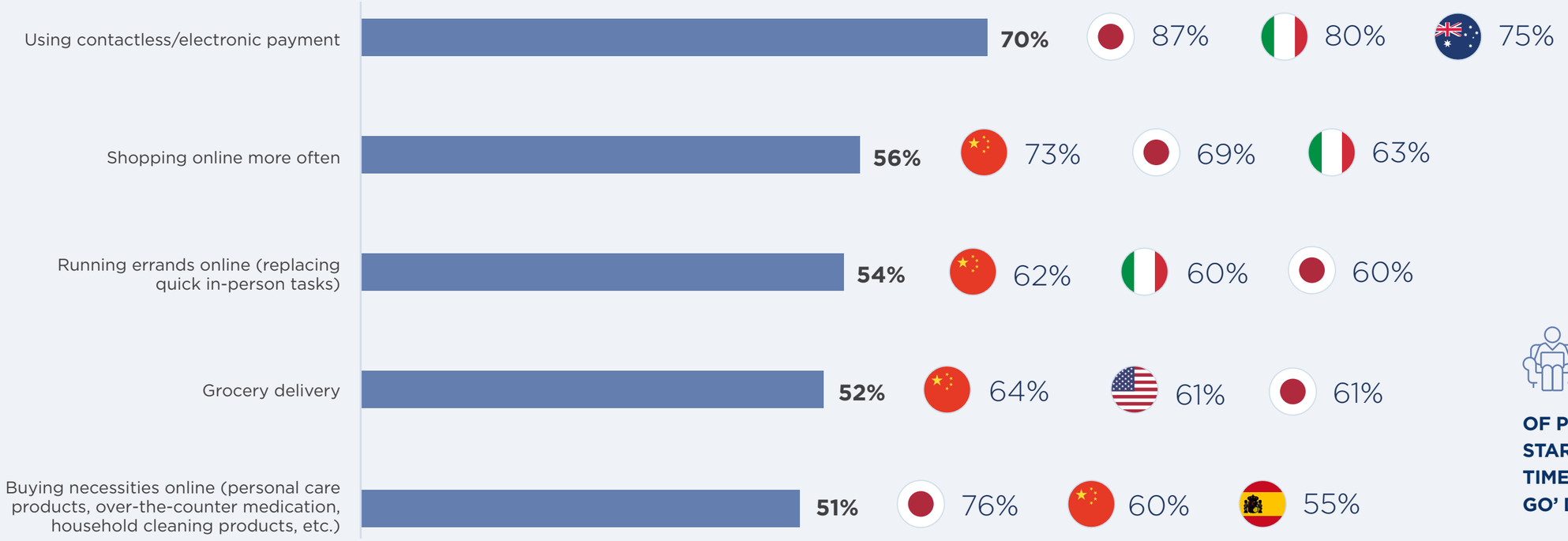
% OF BUSINESS TRAVELERS WHO ARE 'EXTREMELY' OR 'VERY' COMFORTABLE WITH THESE TYPES OF BUSINESS TRAVEL NOW



MEANWHILE, MORE TIME AT HOME LED TO A **GREATER RELIANCE ON ONLINE SERVICES FOR SHOPPING AND ERRANDS** – HABITS THAT CONSUMERS PLAN TO CONTINUE

CONVENIENCE SPENDING HABITS THAT PEOPLE WANT TO CONTINUE

Among those who did these things during the pandemic



38%

OF PEOPLE GLOBALLY STARTED SPENDING MORE TIME AT HOME THAN 'ON THE GO' DURING THE PANDEMIC

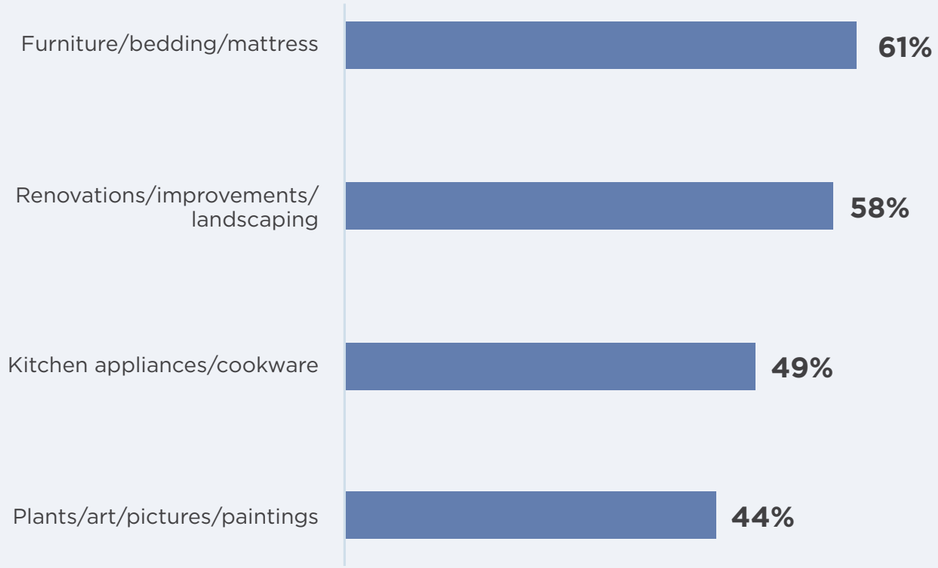
EXTRA TIME AT HOME LED PEOPLE TO **SPEND ON HOME IMPROVEMENT & FURNISHINGS**

1/3

of consumers say the pandemic inspired them to **spend more money on home improvements/furnishings**

TOP HOME IMPROVEMENT PURCHASES

Among those who were inspired by the pandemic to spend more on home improvements/furnishings



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