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.
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 (1,002), 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

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.

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

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

- Having material possessions that impress others: 46% (more), 19% (the same), 13% (less)
- Pursuing hobbies & following my interests: 56% (more), 6% (the same), 6% (less)
- Taking care of my mental health: 50% (more), 5% (the same), 5% (less)
- Taking care of my physical health: 50% (more), 5% (the same), 5% (less)
- Quality time with family/loved ones: 47% (more), 6% (the same), 6% (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.
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

- Remote school for kids: 54%
- Virtual doctor appointments/telemedicine: 37%
- Virtual meetings unrelated to work: 36%
- Socializing with friends/family virtually: 35%
- Taking virtual classes: 34%

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

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%
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.

<table>
<thead>
<tr>
<th>Country</th>
<th>% Believe Life Will Never Be the Same</th>
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<tbody>
<tr>
<td>Global</td>
<td>57%</td>
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<tr>
<td>🇬🇧</td>
<td>66%</td>
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<td>🇫🇷</td>
<td>64%</td>
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<td>62%</td>
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<td>59%</td>
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<td>56%</td>
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<td>50%</td>
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<td>49%</td>
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</table>
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

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>International travel</td>
<td>75%</td>
</tr>
<tr>
<td>Domestic travel</td>
<td>74%</td>
</tr>
<tr>
<td>Seeing family members from other households</td>
<td>73%</td>
</tr>
<tr>
<td>Seeing friends in person</td>
<td>72%</td>
</tr>
<tr>
<td>Dating/romance</td>
<td>70%</td>
</tr>
<tr>
<td>Dining in restaurants</td>
<td>66%</td>
</tr>
<tr>
<td>Physical contact (handshakes, hugs, etc.)</td>
<td>66%</td>
</tr>
<tr>
<td>The gym or yoga/fitness studio</td>
<td>65%</td>
</tr>
<tr>
<td>Crowded events (bars, concerts, sports, etc.)</td>
<td>62%</td>
</tr>
</tbody>
</table>

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...

71% 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

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commuting at least 30 minutes</td>
<td>45%</td>
</tr>
<tr>
<td>Going to an office or workplace every day</td>
<td>37%</td>
</tr>
<tr>
<td>Wearing formal ‘business attire’</td>
<td>34%</td>
</tr>
<tr>
<td>Having a fixed/regular work schedule (like 9 to 5)</td>
<td>32%</td>
</tr>
<tr>
<td>Feeling ‘busy’ all the time</td>
<td>31%</td>
</tr>
<tr>
<td>Face-to-face meetings</td>
<td>25%</td>
</tr>
</tbody>
</table>

WHAT WORKERS ‘DEFINITELY’ OR ‘PROBABLY’ WANT TO CONTINUE
Among those who did these things during the pandemic

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flexible work hours</td>
<td>70%</td>
</tr>
<tr>
<td>Dressing more casually/comfortably</td>
<td>57%</td>
</tr>
<tr>
<td>Not having to commute</td>
<td>54%</td>
</tr>
<tr>
<td>Working remotely</td>
<td>54%</td>
</tr>
<tr>
<td>Hybrid work model</td>
<td>53%</td>
</tr>
<tr>
<td>Feeling less ‘busy’ all the time</td>
<td>42%</td>
</tr>
</tbody>
</table>

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

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

- 9% of people worked remotely all of the time before the pandemic.
- 20% of people worked remotely all of the time in May 2020.
- 27% of people worked remotely all of the time today.

52% increase in remote work from before the pandemic.

Remote work (full or partial) is... Most common in:

- United Kingdom: 54%
- Netherlands: 51%
- United States: 50%
- Canada: 50%

Least common in:

- Japan: 31%
- China: 32%
- Australia: 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

- All workers: 34%
- Parents of kids <18: 41%
- Work entirely in the workplace: 31%
- Work remotely (fully or partially): 39%

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

- All workers: 41%
- Parents of kids <18: 50%
- Work entirely in the workplace: 35%
- Work remotely (fully or partially): 51%

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.

51% of remote workers feel much more productive working from home than in an office.

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

YES 45%  NO 36%

WHERE ARE VACATIONERS GOING IN THE NEXT 6 MONTHS

81% DOMESTIC TRAVEL  32% INTERNATIONAL TRAVEL

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.

<table>
<thead>
<tr>
<th></th>
<th>MORE</th>
<th>SAME AMOUNT</th>
<th>LESS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gen Z</td>
<td>24%</td>
<td>49%</td>
<td>27%</td>
</tr>
<tr>
<td>Millennials</td>
<td>32%</td>
<td>51%</td>
<td>27%</td>
</tr>
<tr>
<td>Baby Boomers</td>
<td>34%</td>
<td>49%</td>
<td>27%</td>
</tr>
<tr>
<td>Silent Generation</td>
<td>33%</td>
<td>51%</td>
<td>27%</td>
</tr>
</tbody>
</table>

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**
- Beach: 46%
- Remote location (lake, river, forest): 28%
- Popular tourist destination: 26%
- Big city: 25%
- Stay at home: 10%
- Cruise: 8%

**Transportation Plans**
- Their own vehicle: 41%
- Plane: 35%
- Train: 18%
- Rented vehicle: 11%
- Bus: 10%

**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

Worried about catching Covid-19: 40%
Not worth the hassle of dealing with Covid-19 restrictions: 30%
Can’t afford to travel right now: 29%
Waiting for others to be vaccinated: 21%

CONSUMERS STILL HAVE CONCERNS ABOUT FLYING AND STAYING IN HOTELS

Just 1 in 3 feel totally safe traveling by plane

- 46% (HIGHEST)
- 42%
- 41%
- 38% (LOWEST)

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

- 53% (HIGHEST)
- 51%
- 50%
- 50% (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 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

<table>
<thead>
<tr>
<th>Travel Type</th>
<th>% of Vaccinated Business Travelers</th>
</tr>
</thead>
<tbody>
<tr>
<td>By car within their own region</td>
<td>50%</td>
</tr>
<tr>
<td>Staying in hotels</td>
<td>41%</td>
</tr>
<tr>
<td>Domestic air travel</td>
<td>40%</td>
</tr>
<tr>
<td>Dining in restaurants</td>
<td>39%</td>
</tr>
<tr>
<td>Public transport within their region</td>
<td>37%</td>
</tr>
<tr>
<td>International air travel</td>
<td>35%</td>
</tr>
</tbody>
</table>
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

- Using contactless/electronic payment: 70%
- Shopping online more often: 56%
- Running errands online (replacing quick in-person tasks): 54%
- Grocery delivery: 52%
- Buying necessities online (personal care products, over-the-counter medication, household cleaning products, etc.): 51%

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:

- Furniture/bedding/mattress: 61%
- Renovations/improvements/landscaping: 58%
- Kitchen appliances/cookware: 49%
- Plants/art/pictures/paintings: 44%

SECTION 3 | TRAVEL AND SPENDING