

The consumer transformed

**Changing behaviours are accelerating trends along
a reinvented customer purchase journey**

The technology and science writer William Gibson once wrote, “The future is already here — it’s just not evenly distributed.” Gibson’s point is that the future isn’t the same, or doesn’t arrive at the same pace, for everyone.

At PwC, we believe the implication of Gibson’s words is that with the right tools and talent, companies can meet market disruption head-on and ‘Reinvent the Future’ for their own particular organisation.

And for companies that cater to the end consumer, the future is arriving more quickly than anyone imagined just a few short months ago, accelerating digital trends that had already been transforming consumer behaviour. Businesses need to understand how this new world affects all their touch points with the customer if they are to actively reinvent their own future and not be at the mercy of external events.

The coronavirus pandemic, for example, has accelerated the pace of behavioural changes around the world — how people work, eat, communicate, play and learn. And this extends to consumption patterns, too, in every category, including groceries, entertainment, healthcare and even data. It’s important for B2C companies of all kinds to understand the degree to which the current customer journey has already changed, and just how different it might still become.

In this year’s Global Consumer Insights Survey — PwC’s 11th consecutive survey of global consumers — we polled city dwellers on their purchasing behaviour in two separate studies, one *before* and one *after* the coronavirus outbreak (see figure 1, next page). Why urban consumers? Because billions of people worldwide live in cities, and this concentration has created a new era in global consumption. Cities are vibrant centres of education and innovation, seedbeds and greenhouses for new ideas. And they’re where economic activity happens. The World Bank [notes](#) that 80% of global GDP is generated in cities. We want to understand, first, the behaviour of these cutting-edge consumers and, second, the implications for businesses.

Figure 1
About the Global Consumer Insights Survey 2020

Before COVID-19

19,098
respondents

27 territories

74 cities

Participants in the survey conducted before COVID-19: Australia, Brazil, Canada, China, France, Germany, Hong Kong SAR, Hungary, India, Indonesia, Ireland, Japan, Malaysia, Mexico, Middle East, Netherlands, Philippines, Russia, Singapore, South Africa, South Korea, Spain, Thailand, Turkey, UK, US, Vietnam

After COVID-19 outbreak

4,447
respondents

9 territories

35 cities

Participants in the survey conducted after the COVID-19 outbreak: China, France, Germany, Italy, Middle East, Netherlands, Spain, Sweden, UK

After analysing the results of PwC's consumer survey data, along with other third-party research, we've developed four foundational insights that align with questions you should be asking about how recent consumer behavioural changes have affected different phases of the customer purchase journey. These questions and insights will help you understand just how much your relationship with consumers could change in the months and years ahead as you reinvent the future of your company.



Question 1: How robust will the market be for my goods or services?

Insight 1: Expect market volatility and price sensitivity

Customer purchase journey insights



The COVID-19 situation has deeply affected urban consumers' views on spending. Before the outbreak, consumer confidence was sky-high, with almost half (46%) of our survey respondents saying they expected to spend more in the next 12 months. When we reached back out to people after the outbreak had begun, 40% reported a decrease in income as a result of job loss or redundancy. In addition, the percentage of those who said they were going to spend less in the next few months almost doubled, and the number who said they were going to spend more dropped by more than 10 percentage points (see figure 2).

Figure 2
Spending outlook shifts as job losses mount

40% of global consumers have experienced a drop in income due to job loss

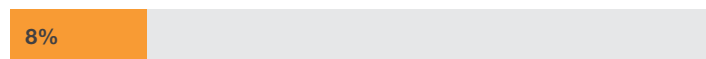
An increase in household bills (e.g., food, home heating, electricity)



A decrease in household income due to redundancy/loss of job/reduction in hours



A decrease in household income due to illness/caring for others



18%

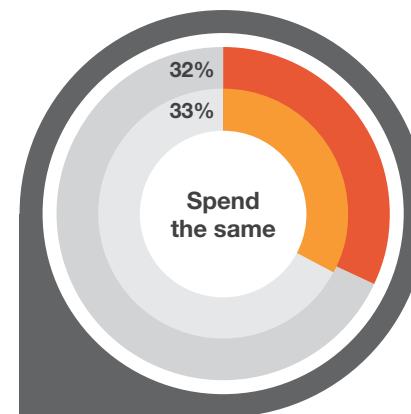
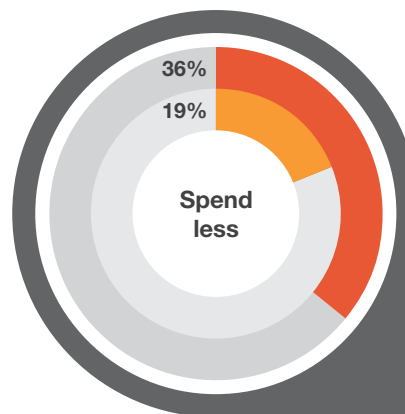
have experienced a decrease in income and an increase in household bills

Question: Which, if any, of the following have you experienced as a result of the current COVID-19 situation?

Base: 4,447

Source: PwC, Global Consumer Insights Survey 2020

Percentage of consumers who say they'll spend less has almost doubled



Spend less leaders

Spain 56%

UK 43%

Italy 42%

Spend more leaders

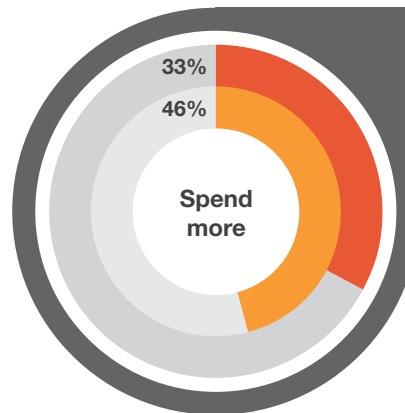
Middle East 49%

China 43%

France 39%

■ After COVID-19 outbreak

■ Before COVID-19



Question, 2019: In terms of your personal spend for the next 12 months, do you expect to...

Note [before COVID-19]: 4% of those who said 'spend less' said they are already holding back spending. 3% stated 'don't know.' Base: 19,098

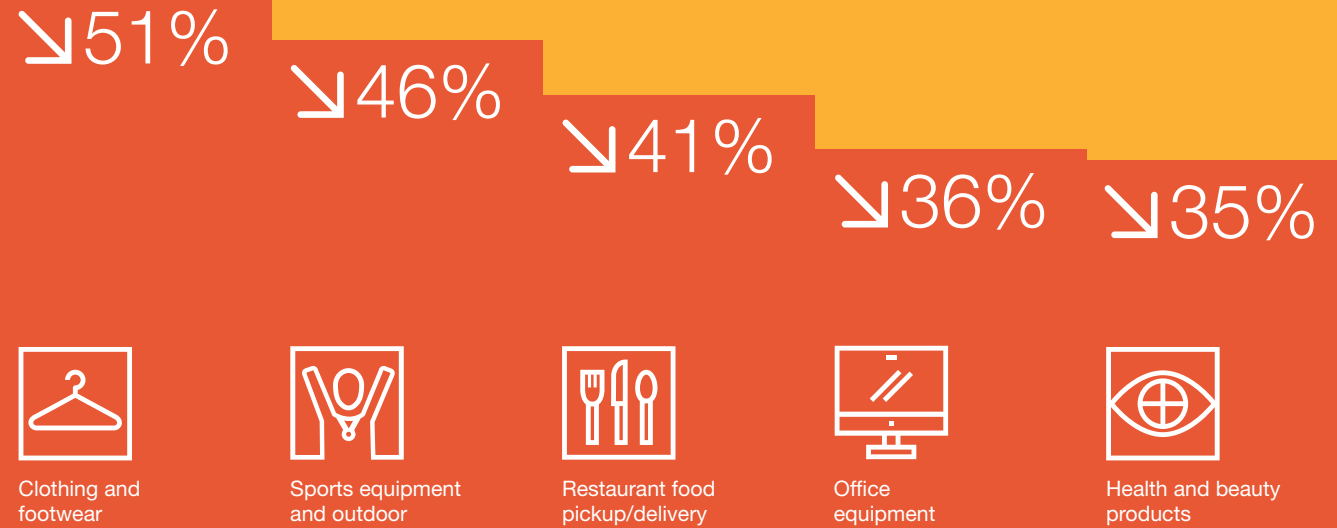
Question, 2020: As a result of the COVID-19 (coronavirus) situation, how do you expect your household spend to change over the next few months? Base: 4,447

Source: PwC, Global Consumer Insights Survey 2020



Figure 3
Consumers are spending less in most nonfood categories

Question: How has your household spending in the following categories changed, if at all, as a result of the COVID-19 (coronavirus) social distancing/ social isolation measures? Percentage shown of those who said "decreased"; excludes those who stated "I do not spend in this category."



Countries indicating the biggest decrease in spending:

Spain 70%	Spain 61%	Spain 62%	Middle East 50%	Middle East 45%
Italy 65%	Italy 57%	UK 58%	Spain 49%	UK 44%
UK 60%	Middle East 53%	China 49%	Italy 44%	China 42%

Base: 4,447

Source: PwC, Global Consumer Insights Survey 2020



As time since the first harried days and weeks of the pandemic passes, however, evidence suggests consumers are becoming more optimistic. The global consumer confidence index published by US-based business research firm The Conference Board showed its steepest ever two-month drop between its February and April surveys, but its May 2020 index showed that the percentage of people who expected business conditions to improve over the next six months increased from 39.8% to 43.3%, and those expecting business conditions to worsen decreased from 25.1% to 21.4%. In its June 2020 index, those expecting business conditions to worsen declined again, from 21.4% to 15.3%. Our own COVID-19 consumer study shows that the spending outlook is more positive in countries where isolation measures are being lifted, such as China and the Middle East.

Before isolation measures were put in place, urban consumers were opening their wallets for travel, dining out, art and cultural events, personal styling, health and wellness, nightlife and entertainment, and sporting events. Travel and dining out were two of the top three ways city dwellers spent disposable income, with 44% and 41% of respondents choosing those categories, respectively.

But since the outbreak, people are spending the most on groceries, in-place entertainment and home projects. For food items, they're making fewer shopping trips — 45% say they are shopping less often for groceries — but filling up bigger baskets. For most nonfood items, consumers are buying online and, with the exception of entertainment and media, spending significantly less (see figure 3).



Implications and action items

Although urban consumers are clearly becoming more upbeat, they might not be as resilient as they hope to be, especially as unemployment and household bills increase. City dwellers might decide to get by with fewer discretionary purchases, suggesting a continuation of reduced spending in categories such as clothing and footwear, travel, and household appliances.

To address these issues, companies should:

- understand what shoppers really value to determine the minimum viable basket — the ‘anchor’ products or services that must be available at all times and prioritised through the supply chain. Then focus assortments and promotions on this core basket
- ensure that the supply chain has been recalibrated to maintain delivery of products for this core basket
- make an effort to understand how customers’ general priorities are changing to put more weight on price and value, and use this opportunity to re-evaluate their relationship with their customers
- consider new pricing strategies and loyalty programmes in the digital ecosystem to drive and maintain customer engagement.



Question 2: What is the experience I'll need to offer to attract customers?

Insight 2: Consumer experience must be rooted in safety and accessibility

Customer purchase journey insights



Our consumer research before the COVID-19 outbreak showed that city dwellers were remarkably devoted to shopping (including in physical stores), travelling and dining out. In fact, in-store visits were the top way of shopping for the past eight years of our consumer research, including this year's pre-COVID-19 research, which showed that 47% of our global urban respondents shopped in-store at least once per week.

In the era of COVID-19, however, even in locations where lockdowns have been partially lifted, urban consumers are making fewer shopping trips, patronising restaurants less often and consuming more at-home entertainment. Our second round of research after the pandemic started found:

- 49% of respondents spending less because of fewer social events and activities
- 23% lost money due to cancelled events or activities
- 50% using social media more than before social distancing measures were put in place
- 56% watching more television than before social distancing measures were activated.

For consumers to feel confident enough to return to a semblance of normal physical interactions with retailers, hotels and other consumer-facing businesses, the first thing they'll need is solid assurance that places of business have a plan to make their customer experience as safe as possible. For example, in a recent [PwC survey](#) of US hospitality consumers, respondents said their number one consideration when booking both flights and hotels was "brand trust, including confidence in safety and cleanliness."



Evidence that health and safety are top of mind for consumers is everywhere. In our research before the outbreak, when we asked urban consumers to choose their top three reasons for living in their city, they named employment prospects (31%) ahead of safety and security (27%) and healthcare (19%). After the outbreak, safety and security and healthcare had become just as important to urban consumers as employment prospects, with 49% and 45% of respondents saying so, respectively, compared with 45% for employment. In other words, two of the three top choices were related to well-being. Quality of healthcare was a particularly important factor in Sweden and Spain, where 56% and 53% of our respondents, respectively, named it as a feature of their city that was most important to them.

No matter how safe consumer-facing companies make their products, supply chains and physical locations, the reality is that many people have gotten used to doing virtually everything at home. Not only has there been a shift to online celebrations for occasions such as graduations and anniversaries, people are also engaging virtually around their interests and activities. For example, when we reached back out to global urban consumers after the COVID-19 outbreak, 36% said their household spending had increased in the area of entertainment and media, and 26% said their household spending had increased in the combined area of DIY, home improvement and gardening.



Implications and action items

Companies with the technology and imagination to design great experiences in the home — or close to home — will have a huge advantage, at least in the near term. As more urban consumers begin to step out into their communities, there could be room for blended physical and virtual experiences, too, that make it possible for people to stick close to home. “You’re seeing this a lot now in new developments,” notes Ghaith Shocair, former CEO of Majid AL Futtaim Shopping Malls, a leading mall developer headquartered in Dubai. The modern retail mixed-use environment is efficient, he told PwC, serving as a lifestyle destination encompassing green spaces, shops, restaurants, health and wellness, entertainment centres and fitness facilities, intertwined within transportation grids and higher-density urban residential and work communities. “It knits the community fabric closer together. That is what the new consumer, the new urban resident...is looking for,” he told PwC. In a COVID-19 world, this localised, contained ecosystem could be in high demand.

To be responsive to safety concerns and at-home interests, businesses should:

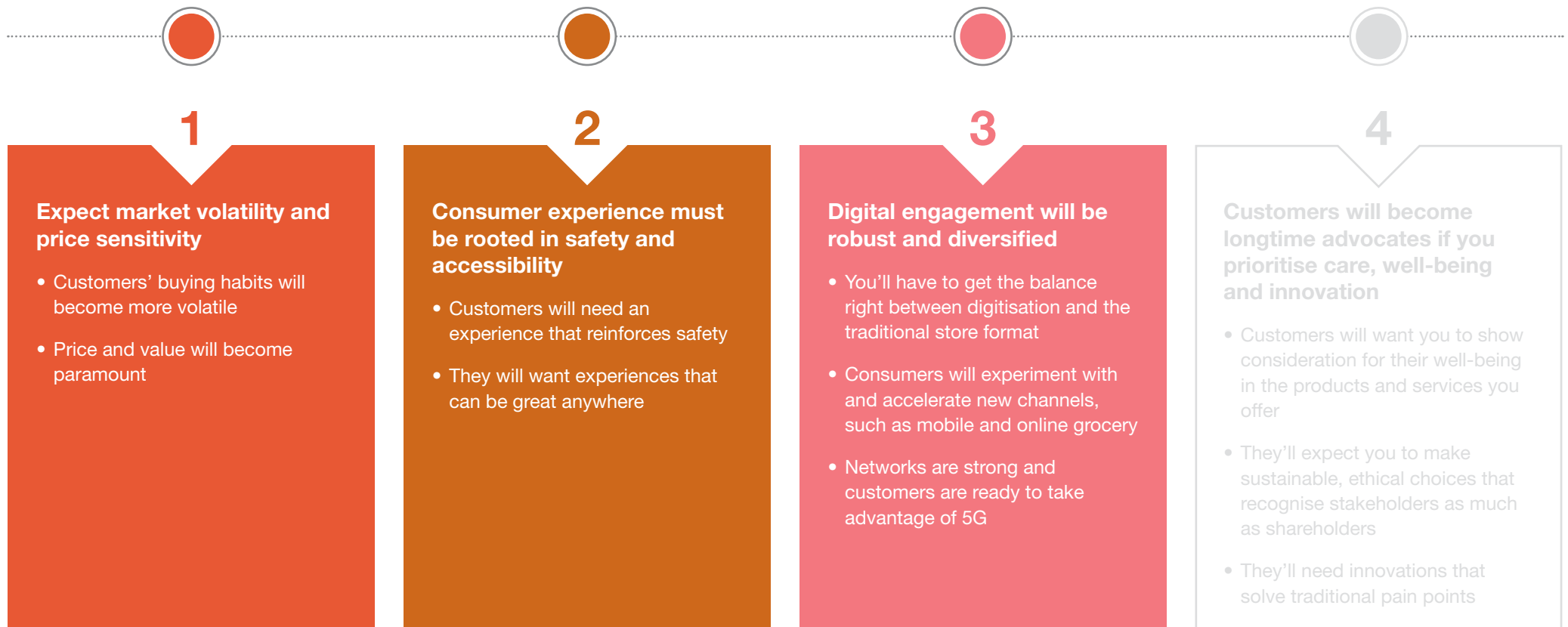
- equip workers with personal protective equipment
- communicate frequently with consumers about safety policies, including which trusted sources they are relying on for guidance, such as the Centers for Disease Control in the US, the Australian Institute of Health and Welfare in Australia and the French Institute for Public Health Surveillance in France
- improve employees’ digital fitness so they can meet consumers where they are for now: online
- implement mobile contact tracing for all staff.



Question 3: How will I engage with my customers?

Insight 3: Digital engagement will be robust and diversified

Customer purchase journey insights



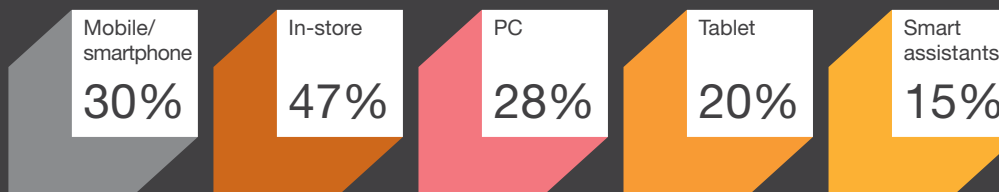
Not only has the COVID-19 outbreak reinforced the already growing trend of online shopping, it's encouraged experimentation, coaxing consumers to explore different ways to access products and services and accelerating certain behaviours that have long been simmering in the background.

When we first surveyed urban consumers in late 2019, mobile online shopping was becoming more popular with consumers, and since the outbreak, our consumer research again shows that a significant percentage of consumers say they've increased their mobile shopping (see figure 4). This trend is especially pronounced in China and the Middle East, with 60% and 58% of respondents, respectively, saying they've started shopping more on their mobile phones. And most respondents said they're likely to maintain their current increased use after isolation measures are lifted.



Figure 4
Mobile shopping is clearly accelerating

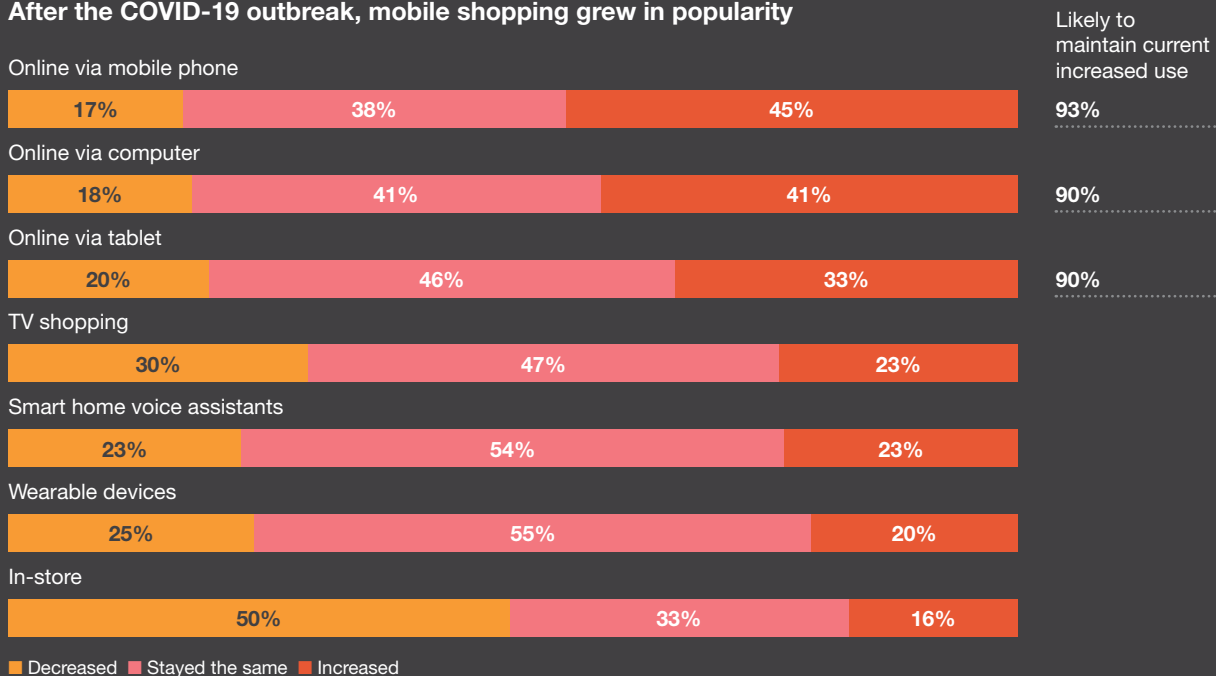
Before COVID-19, mobile shopping was comparable to other types of online shopping



Question, 2019: How often do you buy products (e.g., clothes, books, electronics) using the following shopping channels? (Showing "daily" and "weekly" replies)

Base: 19,098

After the COVID-19 outbreak, mobile shopping grew in popularity



Question, 2020: Thinking about how you've been shopping for nonfood items (e.g., items other than groceries, such as clothes, books, electronics, health and beauty, and household products) while social distancing/social isolation measures have been in place, how has your use of the following shopping channels changed, if at all?

Question, 2020: Still thinking about how you've been shopping for items other than groceries/food, how likely are you to continue to use this channel to the same extent when social distancing/social isolation measures are removed? (Percentages shown are those who answered that they're likely to maintain current increased use.)

Base range: 1,819 to 4,264. Source: PwC, Global Consumer Insights Survey 2020

Mobile shopping isn't the only digital trend the pandemic has jump-started. Before the outbreak, online grocery shopping was well behind online shopping for nonfood items. But what was unfathomable to many just a few months ago — buying fresh produce online, for example — has become the new normal. In-store shopping is

still the channel of choice for grocery shopping, but our research shows that two-thirds of urban consumers are now buying food online, including using their mobile phones, and the majority will continue to do so after social distancing measures are removed (see figure 5).

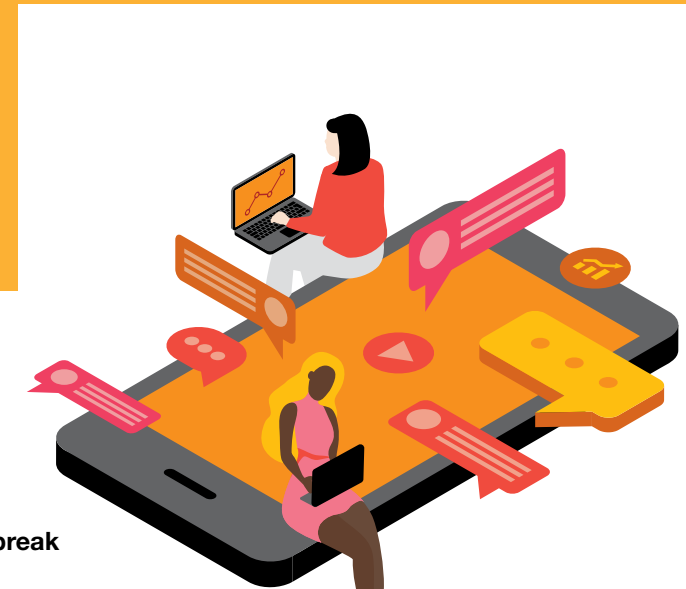


Figure 5
Most consumers who've increased online shopping for groceries will continue current behaviour

Online grocery shopping activity before COVID-19



9%

shopped for groceries exclusively online

Question, 2019: For each of the following product categories, how many of your purchases have you made online over the last 12 months (including purchases made from a computer, tablet or mobile/smartphone, wearable device or smart home voice assistant hub (e.g., Amazon Echo, Google Home, Samsung SmartThings)?)

Note: Results include only people who have bought the product or service online in the past year

Base: 9,052 to 14,545

Source: PwC, Global Consumer Insights Survey 2020

Online grocery shopping activity after the COVID-19 outbreak

63%

are buying more groceries **online/by phone** than before social distancing

Question, 2020: You mentioned that you mainly do your grocery shopping online/by phone. How, if at all, is this different from before social distancing/social isolation measures were put in place? (Note: Not asked in China and UK)

Question, 2020: How likely are you to continue to use online/phone for your grocery shopping to the same extent when social distancing/social isolation measures are removed?

Base: 1,038; 654

Source: PwC, Global Consumer Insights Survey 2020

86%

are likely to **continue to shop online/by phone** when social distancing measures are removed

There had been a belief among some data professionals and consumers before the pandemic that urban broadband networks were fragile and underdeveloped. But our research shows that consumers have been satisfied overall with their broadband speed during their time in isolation – 69% say they’re satisfied or extremely satisfied with the speed of broadband in their home. The countries with the most consumers who said they were extremely satisfied were China and Germany, at 26% each, and Sweden, at 25%.

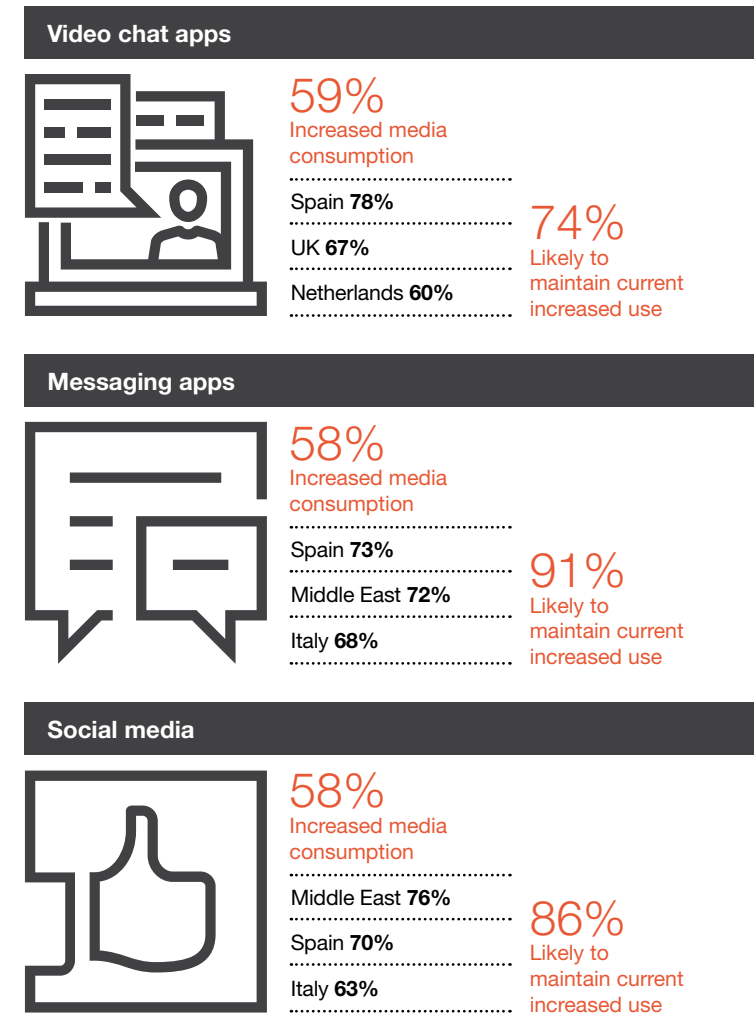
And it’s not just networks that are ready for the digital revolution; people are now equipped with and well-versed in a broad array of digital tools for virtual work, communications and socialising. Since we started surveying consumers 11 years ago, we’ve found more consumers each year adopt social media platforms and apps to enable communication or shopping, yet the increases have largely been incremental and it has been unclear if they would continue to use the apps. The pandemic, however, has accelerated adoption. Most notably, the majority of these adopters say they’ll continue to use video chat apps, messaging apps and social media more than they used to even after isolation measures are eased (see figure 6).

Figure 6
More than half of consumers have increased their use of video or messaging apps and social media

Question: How has your household consumption of the following media changed, if at all, since social distancing/social isolation measures have been in place as a result of COVID-19 (coronavirus)? Percentages shown are those who said ‘increased.’

Question: How likely are you to continue to use this media to the same extent when social distancing/ social isolation measures are removed? Percentage shown are those who said they’re likely to maintain their current increased use.

Base: 4,447
 Source: PwC, Global Consumer Insights Survey 2020



Implications and action items

COVID-19 shutdowns have greased the digital runway, and as some new virtual habits become ingrained, the shift to a more digital world for those who can afford its tools and experiences will become even more pronounced. This evolution will further divide customer segments into those who have digital resources or aptitude and those who don't.

But despite the digital shift, it would be premature to write off physical stores — even though retail foot traffic has plunged during lockdown, our research shows that 49% of urban consumers say their in-store shopping activity for nonfood items since the outbreak has stayed the same or increased. Respondents in European countries, in particular, said so. Consumers in Germany (70%), France (56%) and the Netherlands (53%) had the highest percentages of respondents saying they had increased or continued their in-store shopping.

The pandemic has clearly highlighted the benefits of mobile shopping — its ease, portability and immediacy. Mobile commerce will retain this momentum and likely accelerate, particularly as it has made leaps and bounds in grocery. But the overarching trend will be towards an omnichannel experience, with consumer-facing companies needing to seamlessly integrate their offline and online experiences.

Roberto Fulcherberguer, CEO of Via Varejo, a retail company in Brazil, said in an interview with PwC that this omnichannel evolution was already well underway in grocery in 2019. “In truth, the online commerce model

today is heavily leveraging the physical stores and vice versa. In the not-too-distant future, the terms *online sales* and *physical sales* will disappear and be replaced again by *retail sales*, as these sales formats tend to merge,” he told us.

Given the significant uptick of online grocery during stay-home measures, the resilience of physical grocery visits, and the time it will take for consumers to feel confident returning to dining in restaurants, grocery should be a very strong sector over the next year. Our study reinforces this view, showing that more than 54% of city dwellers who are already doing their shopping mostly online will continue to use online grocery. In fact, Grand View Research, a firm that tracks global e-commerce trends, predicts that the global online grocery market will reach US\$975bn by 2027, growing at an annual rate of 22.7% during the forecast period.

We'll also most likely see retailers offer a greater spectrum of click-and-collect services as consumers limit their exposure and reduce trips. Trends such as curbside pickup and delivery services in grocery, general merchandise and electronics have grown in popularity, and will be here to stay. Mobile shopping will also be expected to fill the vacuum created by physical shopping that does not come back due to bankruptcies and permanent closures of storefronts.

The trend of more consumers embracing online shopping also bodes well for 5G networks. Companies will be able to shore up their capabilities, increase adoption and bring

the online experience to life for a captive cohort. We've already seen the introduction of virtual selling platforms that help showcase products, engage consumers, and provide much richer service levels than, say, a chat box. Such platforms will proliferate across categories.

As tools such as digital sizing in fashion, virtual shoppers, consumer collaboration platforms and augmented reality are introduced and begin to converge, companies should:

- decide how to offer a unique and distinct experience for those who are less digitally inclined, by choice or by economic status, than others
- forge new strategic partnerships across the industry as the rise of direct-to-consumer platforms further fragments channels, and invest in data and customer relationship management technology to drive frictionless commerce and engagement
- formulate a strategy to address the opportunities and challenges that will arise due to the growing popularity of online grocery shopping, including product range and offerings, supply chains and the role of the store
- invest in enhanced network technology to allow for more sophisticated customer segmentation
- reskill service staff so they can build content-rich experiences and better understand the end-to-end customer journey.

Question 4: What are the experiences and products I should be offering to keep customers?

Insight 4: Customers will become longtime advocates if you prioritise care, well-being and innovation

Customer purchase journey insights



In the consumer research we did prior to the pandemic, almost half of the world's urban consumers indicated they were making dietary changes (taking supplements, implementing plant-based food options or restricting certain food groups) in an effort to adopt a healthier lifestyle. When we returned to do more consumer research well into the pandemic, we found a huge, renewed focus not only on diet, but on the holistic concept of healthy living (see figure 7).

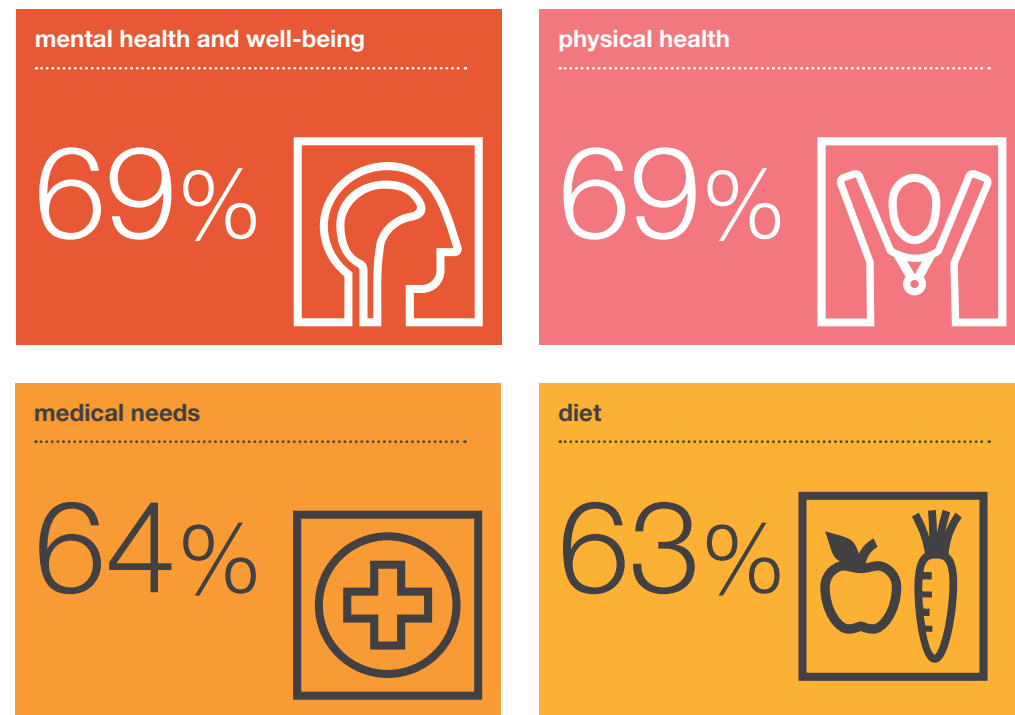
In some territories, the survey results show a seismic shift towards self-care. Perhaps not surprisingly, this dynamic is most apparent in several of the countries hardest hit by the pandemic during the spring of 2020. Of our urban consumers living in China, for example, 90% were more focused on physical health and fitness, 89% on their diet, 87% on their mental health and 85% on their medical needs. For urban consumers living in Italy, 70% were more focused on their health and fitness, 53% on their diet, 74% on their mental health and 75% on their medical needs.

Customers don't just want you to care about them; today they also expect companies to care greatly about the planet. Before the onset of the pandemic, we asked global urban consumers who they thought was responsible for "encouraging sustainable behaviours and/or lifestyle practices."

Figure 7

Focus on self-care has increased as a result of COVID-19

As a result of the COVID-19 situation, I am more focused on taking care of my...



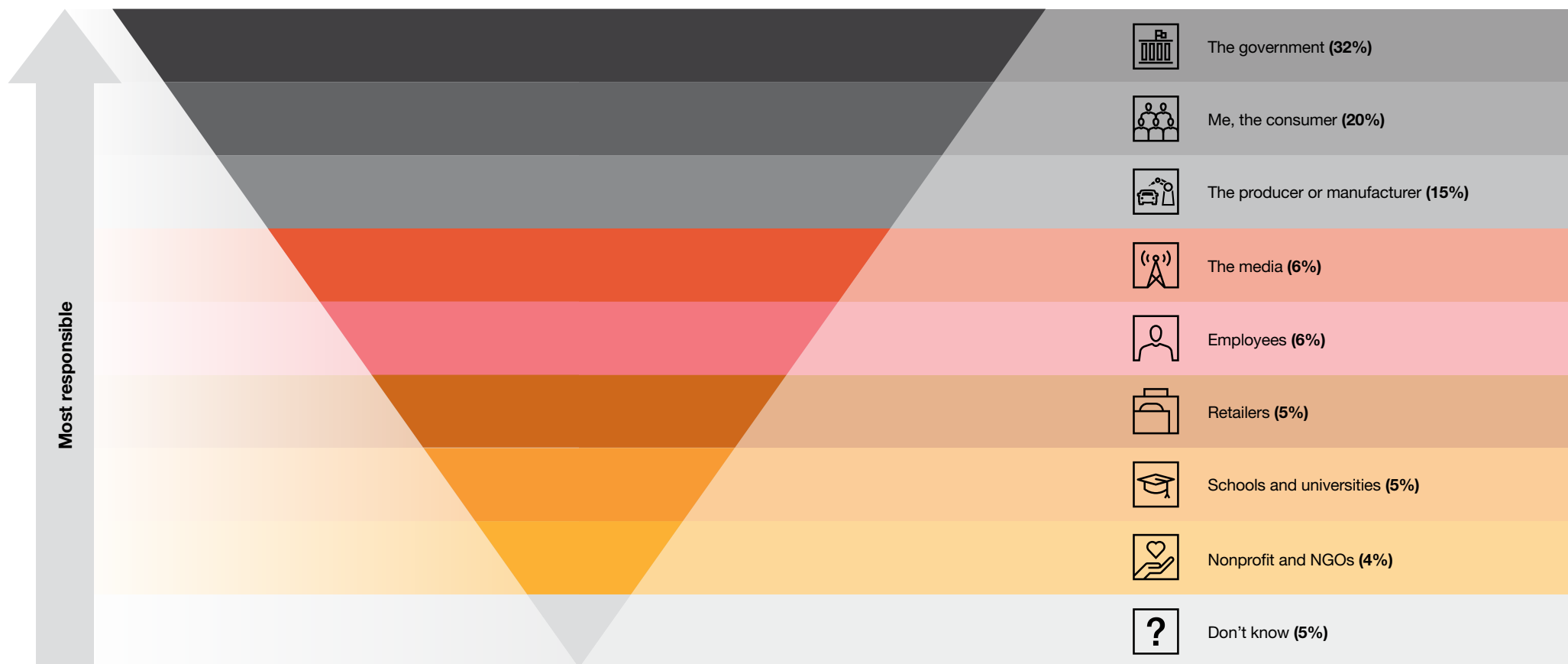
Question: To what extent do you agree or disagree with the following: "As a result of the COVID-19 situation, I am more focused on taking care of my..." (showing sum of strongly agree and slightly agree)

Base: 4,447

Source: PwC, Global Consumer Insights Survey 2020

They answered that the government, the consumer, and the producer or manufacturer bear the most responsibility for creating a sustainable world (see figure 8). This means that few expect the private sector to solve these issues on its own, but it also means that the corporate sector must get much better at joining with government and consumer groups to promote and sponsor sustainable behaviours.

Figure 8
Consumers look to their governments to drive sustainable behaviours



Question, 2019: In your opinion, who should take the biggest responsibility for encouraging sustainable behaviours and/or lifestyle practices in your city/country?

Note: Percentages may not total 100 due to rounding. Base: 19,098. Source: PwC, Global Consumer Insights Survey 2020

The government was the most-cited answer in 20 territories

Before the pandemic, 43% of our global respondents also said they expected businesses to be accountable for their environmental impact. And consumers' focus on sustainable business practices has surged during the COVID-19 crisis. In a separate [consumer survey](#) of just US residents, PwC found that 75% believe companies should try to retain some of the unintended environmental benefits from the US lockdown, such as less air pollution and cleaner water. A similar theme is playing out in the United Kingdom, where the government has [announced](#) the desire to reignite the economy in a much more sustainable way.

The good news is that citizens will give credit where credit is due. For example, well into the COVID-19 pandemic, 56% of urban consumers agreed with the statement, "My city is effectively managing the impact of COVID-19." If this response is any indication of consumers as a whole, companies that adopt a world view based on benefiting stakeholders — not just shareholders — will earn support, and ultimately business, from consumers.

As customers become more interested in caring for themselves and the planet, they're also gravitating to models and systems that have less of an impact on the planet, as well as to those that address pain points to make their lives easier and less stressful. Companies will need to innovate to meet the expectations and retain the loyalty of these customers.



Take new product delivery models as an example. Even before COVID-19 hit, the market for innovative delivery was huge. Some 38% of our survey respondents said they would pay for delivery of groceries that took less than two hours. And during the coronavirus crisis, the *New York Times* has [reported](#) that orders for groceries from Amazon have been as much as 50 times higher than normal levels, and the likes of Instacart and Deliveroo have hired thousands of new delivery people. One company PwC talked to in the course of our research was Dutch online grocer Picnic, which uses custom-designed electric vehicles for precisely scheduled door-to-door deliveries. The company further optimises delivery by collecting return parcels, even for goods not sold by Picnic, because the marginal costs of doing so are minimal. Picnic's innovations in this area addressed an urgent customer pain point and, at the height of the pandemic, have made it into one of the top online grocers in the Netherlands.

The past several months have seen a variety of innovative, unlikely partnerships in grocery. For example, Aldi joined up with Deliveroo to complete last-mile local deliveries, and other retailers have teamed with Uber. Other organisations may question their own operating models in response.



Implications and action items

This phenomenon of a care-centric customer base and business culture could truly be a silver lining in the COVID-19 pandemic. But the extent to which people can focus on their own well-being depends on a complex web of factors, including their ability to maintain or regain income, the ability of gyms and fitness clubs to reopen in urban environments and the ability of healthy restaurants to reopen. In the near term, companies that offer healthy, nutritious products and grocery chains that sell local and organic products will continue to thrive. For instance, Crisp, an app-only grocery service based in the Netherlands, has positioned itself as enabling healthy living. It focuses on quality products by sourcing directly from producers and offering recipes and suggestions online to go beyond just product delivery.

Crisp is only one example; other organisations will take a host of actions to improve customer well-being and foster a culture of innovation during this pandemic — and well after the crisis has passed. Companies can:

- invest in the needed talent, research capabilities and digital tools to solve traditional consumer pain points
- develop new, sustainable products and services
- work together with stakeholders, such as NGOs, the media, trade associations and academia, to re-examine the values they espouse and actions they take
- establish greater inclusivity and transparency across supply chains
- find new supply chain partners that suit shifting consumer demands
- Increase R&D investments into the future of food and nutrition
- train staff to provide a consistent service in line with the brand/offer.



What's next

No one knows for sure just how many of the consumer behavioural changes accelerated by COVID-19 will gain permanent traction, but our recent consumer research is pointing to an increased desire among citizens for transparency, sustainability, cleanliness, community living and social consciousness. In fact, in our 11 years of surveying consumers around the globe, we have never documented such a clear convergence of themes. At such a pivotal moment in our recent history, the need for all consumer-facing companies to establish trust with the consumer could not be any clearer.

Our insights suggest that the pace of change and industry disruption underway will drive the emergence and establishment of a new cohort of winners and laggards in our industry over the next decade, with the consumer at the centre as never before.



Understanding the pace of consumer change can put companies in a position to navigate the disruption

Our research, conducted before and after the coronavirus outbreak, shows that when it comes to consumer behaviour:



Survey methodology

For its 2020 Global Consumer Insights Survey, PwC set out to understand urban dwellers' experiences. We polled more than 19,000 consumers globally, covering 74 cities in 27 territories (Australia, Brazil, Canada, China, France, Germany, Hong Kong SAR, Hungary, India, Indonesia, Ireland, Japan, Malaysia, Mexico, Middle East, Netherlands, Philippines, Russia, Singapore, South Africa, South Korea, Spain, Thailand, Turkey, UK, US, Vietnam). The survey was translated into 19 languages and fielded in August and September 2019. The respondents were at least 18 years old and were required to have shopped online at least once in the previous year.

The quantitative findings were supplemented by extensive interviews with prominent economists, business executives and city leaders from around the world.

After COVID-19 hit, we worked closely with an online panel to reach consumers from key cities in nine territories (China, France, Germany, Italy, Middle East, Netherlands, Spain, Sweden, UK), collecting responses from 4,447 consumers. The territories were selected because they were at different stages of recovery from COVID-19. Fieldwork was completed in April and May 2020.

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