



# Capturing moods during a pandemic

27 January 2021:

An omnibus survey in the UK and USA

CONFIDENTIAL

 **conjoint.ly**

# Executive summary

---

- We conducted an omnibus survey on **~560 general population** in each of the **UK and USA** to understand the impact of a pandemic on consumers' behaviour, comparing results from the same survey conducted in **May 2020, August 2020, and October 2020** to see changes over time across behaviours/sentiments.
- In terms of **general mood**, consumers are anxious, frustrated, and worried about both the **health and economic** consequences of COVID-19. During this period of isolation, consumers **watch TV/streaming services** and **listen to music** to pass the time; **talking to friends and family**, and **watching new TV shows** helps comfort them.
- On the topic of **income**, more **UK and USA** consumers are now expecting no changes. Most consumers are expecting to spend less across all categories (**smaller share of wallet**) and **save/invest** more in the near future.
- **Online purchases** of all three of the top categories – **clothes, groceries, and online deliveries** saw a decrease in both the UK and the USA.
- The perceived **importance and impact of sustainability efforts** differs across the **UK and USA**, with **reducing greenhouse gas emissions** and **lowering pollution** each country's priority, respectively. Additionally:
  - Consumers are **willing to pay more** for **sustainably sourced** products.
  - Being **environmentally friendly** is the most important aspect of **sustainable sourcing** for consumers.
  - **Suppliers** are whom consumers consider to be the most responsible stakeholder for **ensuring sustainable sourcing.**




A low-angle photograph of a large tree with a thick trunk and many green branches, with sunlight filtering through the leaves. The sun is positioned in the upper center, creating a bright lens flare effect. The tree's branches spread out in all directions, filling the frame with green foliage and dark wood. A semi-transparent white banner is overlaid across the middle of the image, containing the text "Sample characteristics".

# Sample characteristics

# Consumer profile: We surveyed general population in the UK and USA

## Criteria for consumers

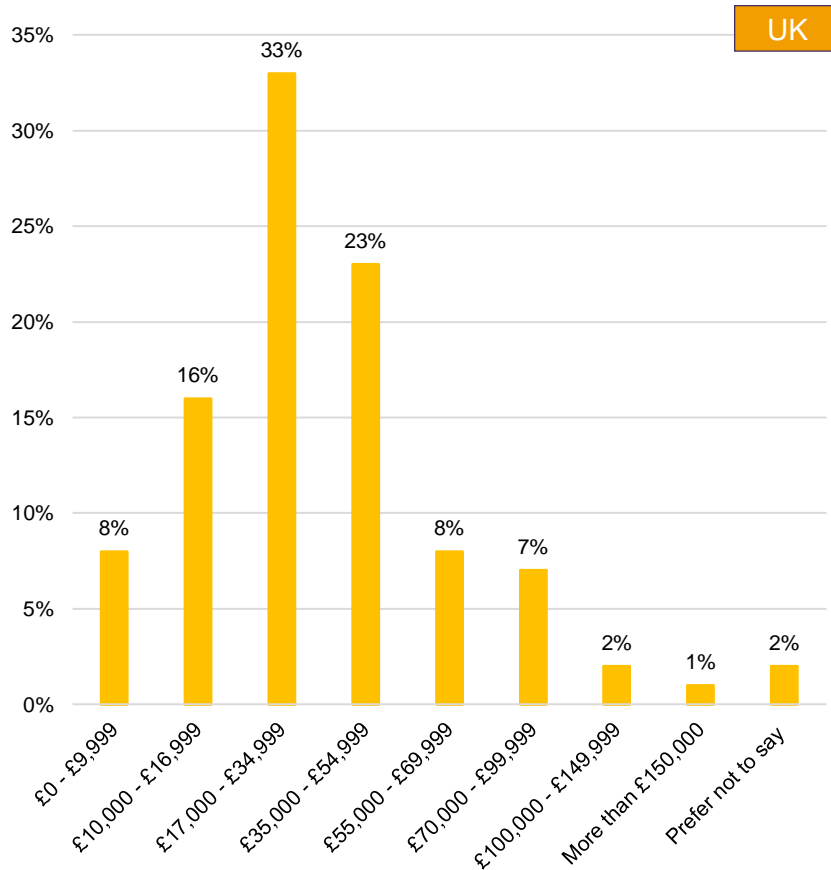
- Located in the UK and USA
- General population, matching gender, age, and income to census
- Surveys conducted from 10-14 December 2020

	UK	USA
All responses	total sample size (N: 562)	total sample size (N: 566)
	% in sample	% in sample
 Age		
15-24	18%	12%
25-34	18%	18%
35-44	14%	26%
45+	50%	44%
 Gender		
Male	41%	49%
Female	59%	51%
 Primary grocery shopper		
Primary shopper	72%	75%
Shops equally	24%	18%
Non-shopper	4%	6%
No answer	0%	1%

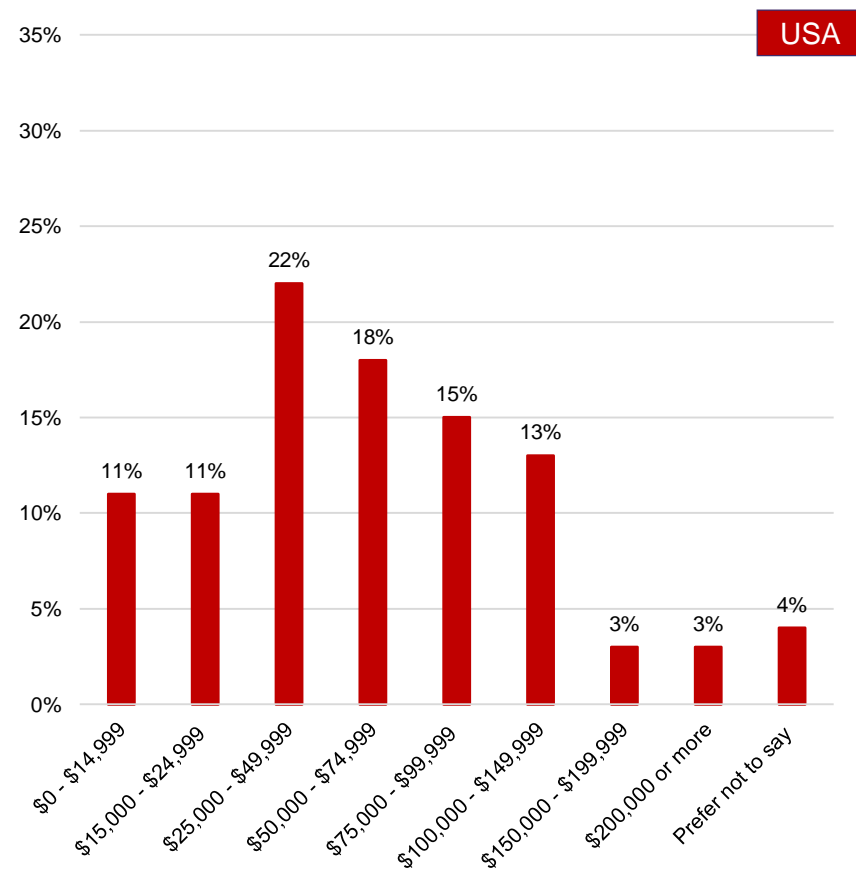
# Consumers' pre-COVID-19 incomes are nationally representative

Q: What is/was your current household annual income, before the COVID-19 crisis (before tax)?

**More than half of UK consumers earn less than £35,000 annually**



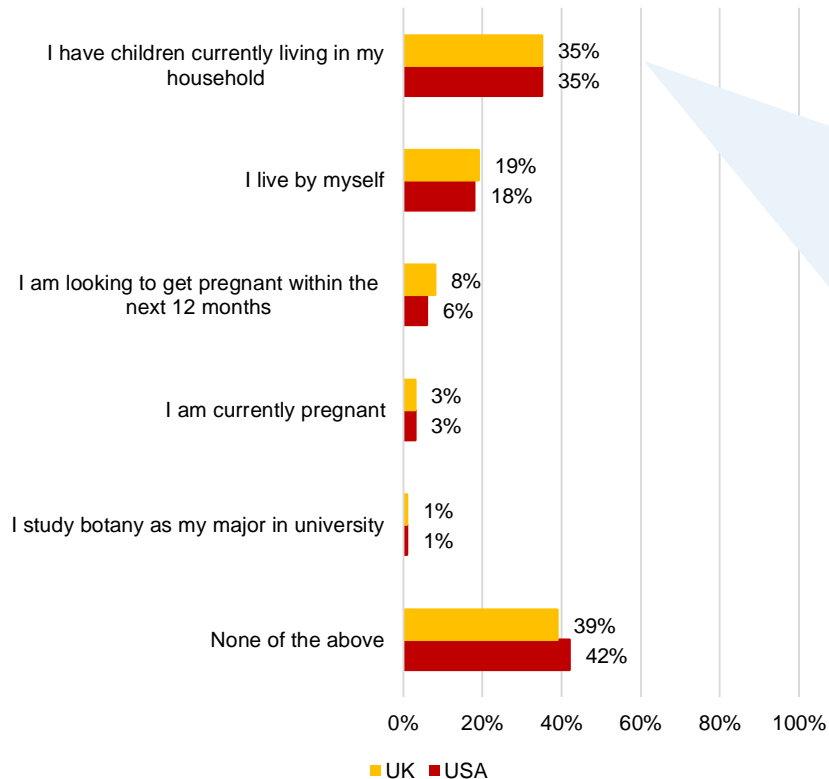
**Almost half of USA consumers earn more than \$49,999 annually**



# Over half of consumers do not have children in their household

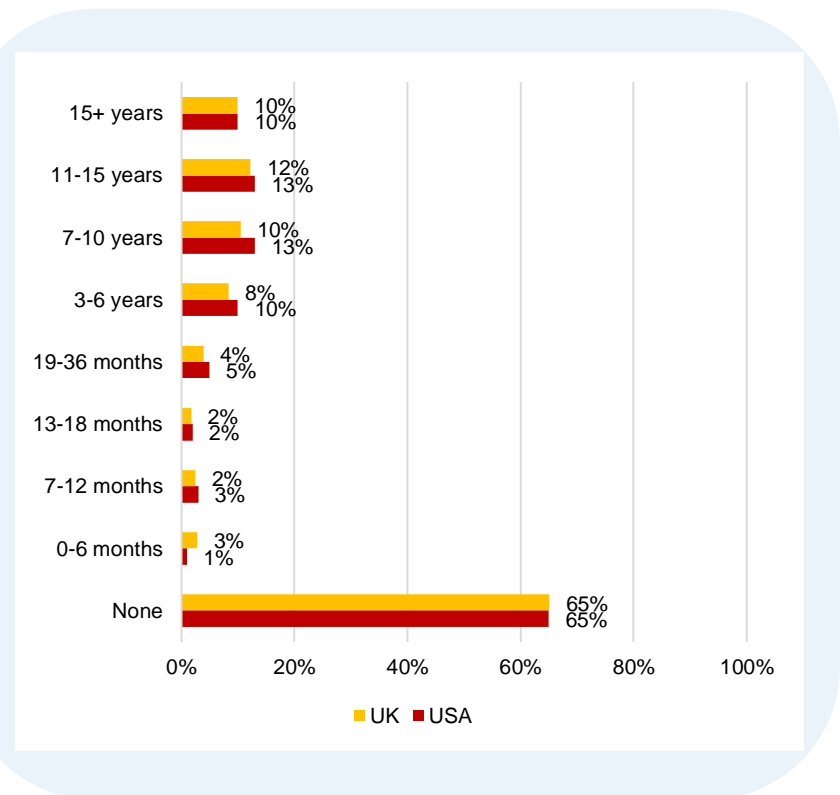
## Less than 50% of consumers have children living in their household

Q: Which of the following statement(s) applies to you?  
Please select all that apply.



## Of those who have children in their household, majority are aged 3+ years

Q: Do children in each of the following age groups live in your household?  
Please select all that apply.

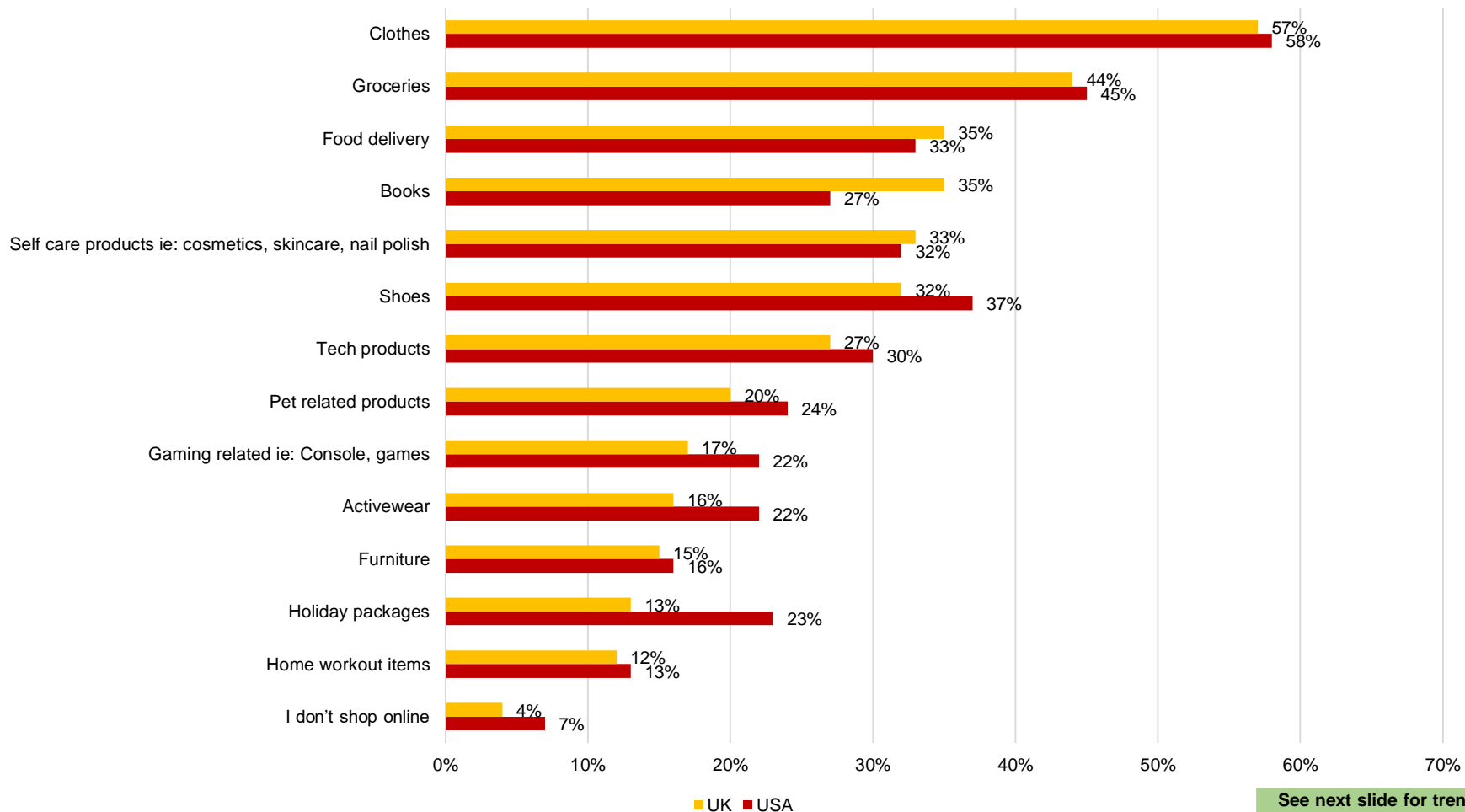




# Consumption traits

# Consumers mostly shop online for clothes and groceries

Q: If you shop online, which of the below do you shop for?

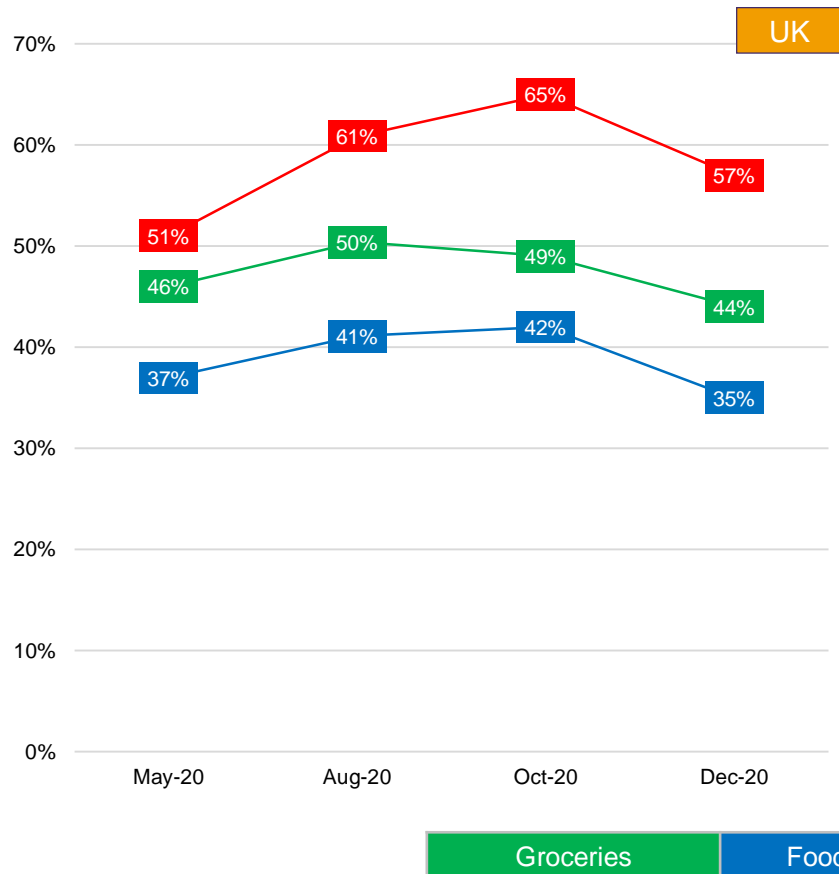


# UK consumers reducing spend on top online shopping categories; USA consumers ordering less food delivery

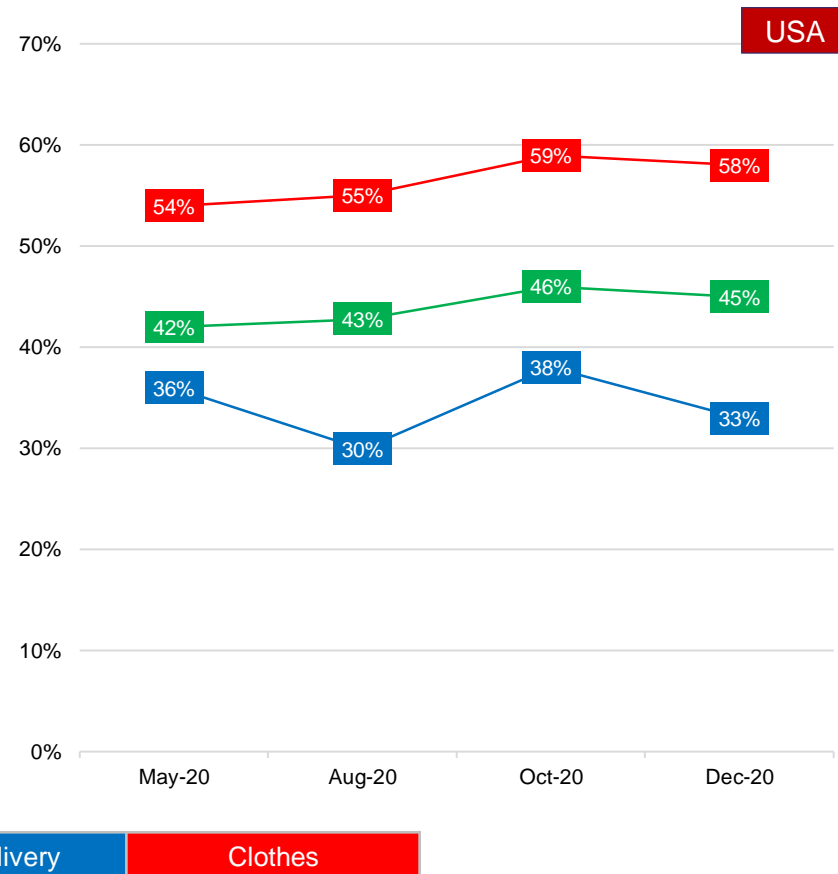
Q: If you shop online, which of the below do you shop for?

Trend comparison

UK consumers have reduced spending on all three of the top online shopping categories



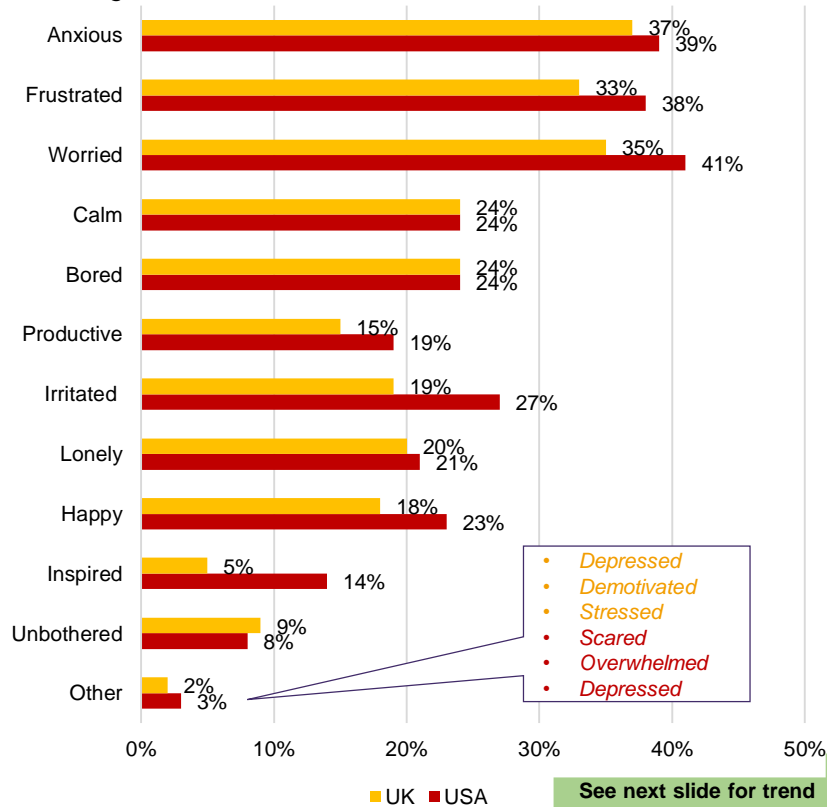
USA consumers have reduced spending on food delivery services



# Consumers are anxious, frustrated, and worried about both the health and economic consequences of COVID-19

During the COVID-19 period, consumers are anxious, frustrated, and worried.

Q: Which of the below is most appropriate in describing how you are feeling in the recent 2 weeks?

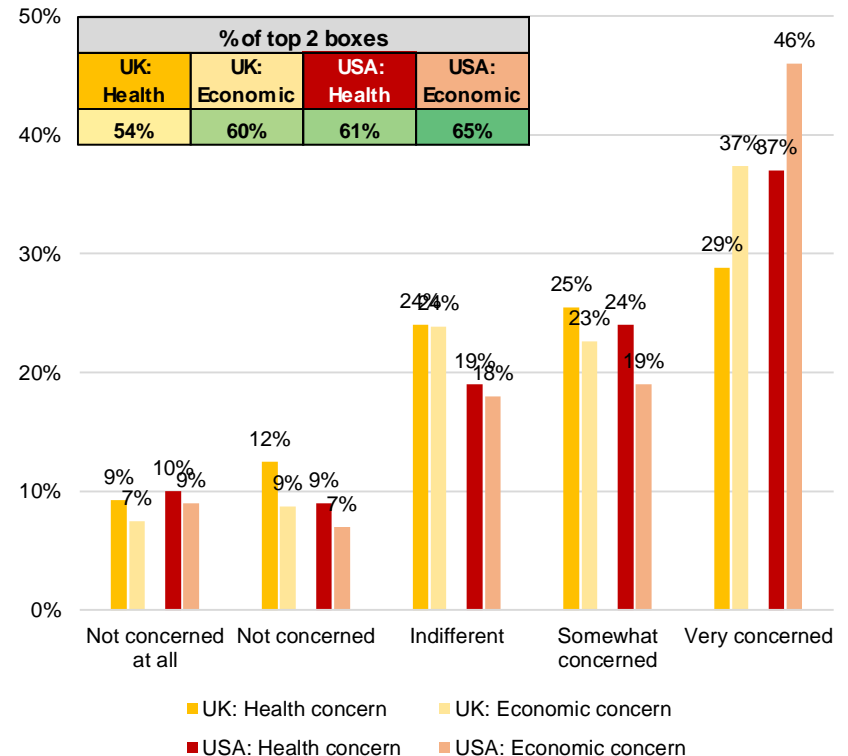


See next slide for trend comparison

Majority of consumers are concerned about both the health and economic impact of COVID-19

Q: On a scale of 1 to 5, how concerned are you...

- Health: that you or anyone in your household may contract the COVID-19 virus?
- Economy: about the economic implications (loss of jobs, income, etc.) due the COVID-19 crisis?

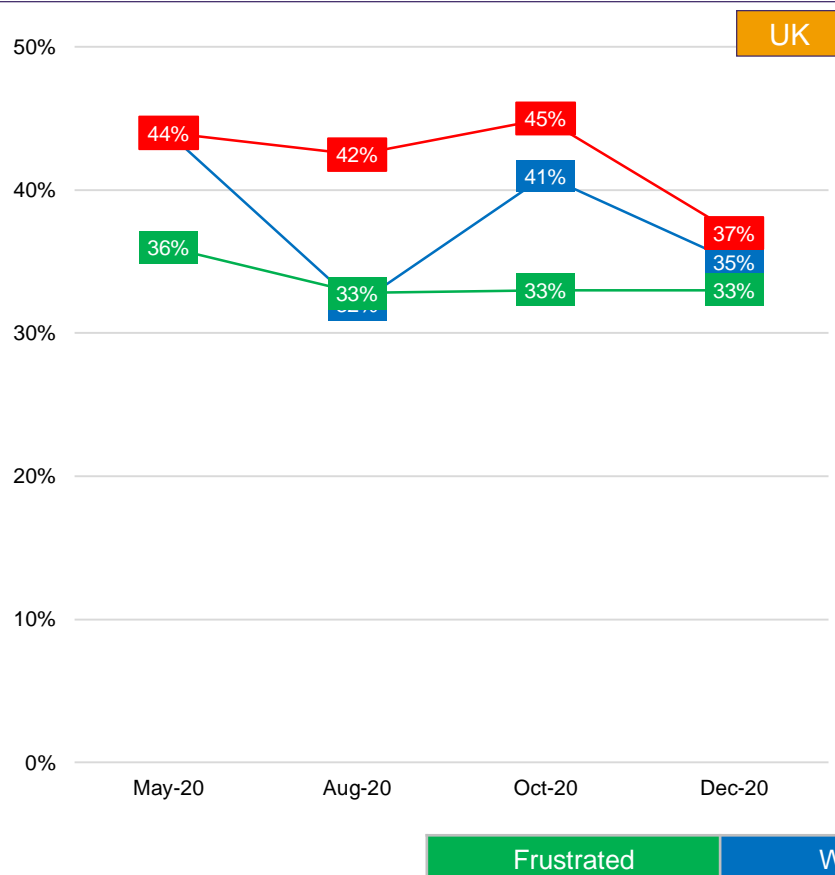


# UK consumers are feeling less anxious and worried in December 2020; USA are less anxious and frustrated

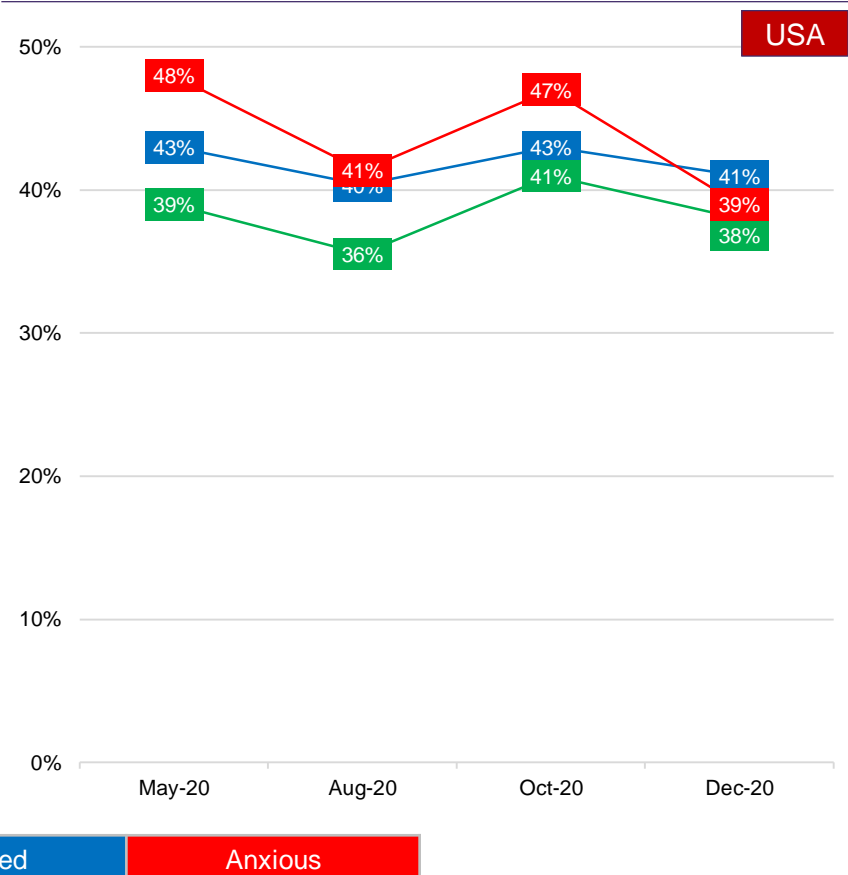
Q: Which of the below is most appropriate in describing how you are feeling in the recent 2 weeks?

Trend comparison

**UK consumers are feeling less anxious and worried in December 2020 than in October 2020**



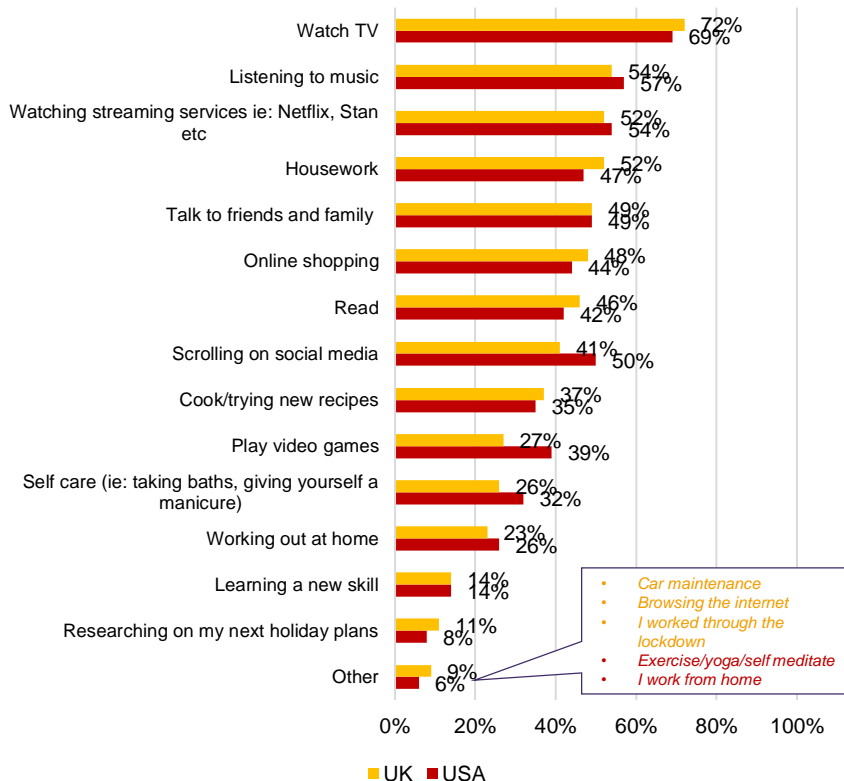
**USA consumers are feeling less anxious and frustrated in December 2020 than in October 2020**



# Consumers take comfort in talking to friends and family; watching TV and listening to music to pass time

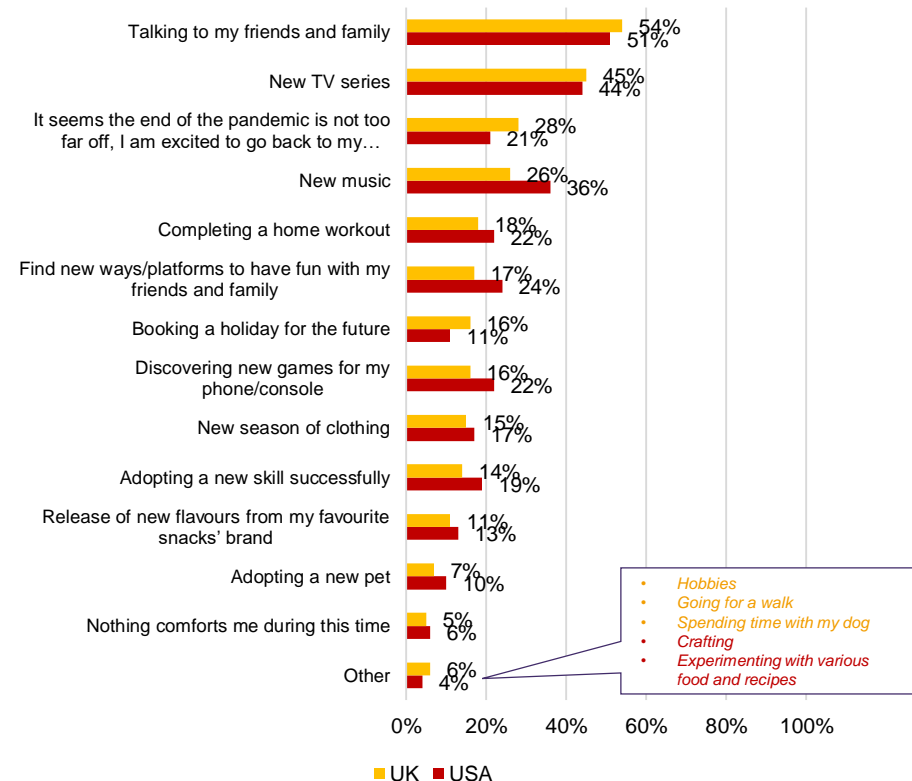
## To pass the time during isolation, consumers mostly watch TV or streaming services, and listen to music

Q: During the time of isolation, what do you do to pass time at home?



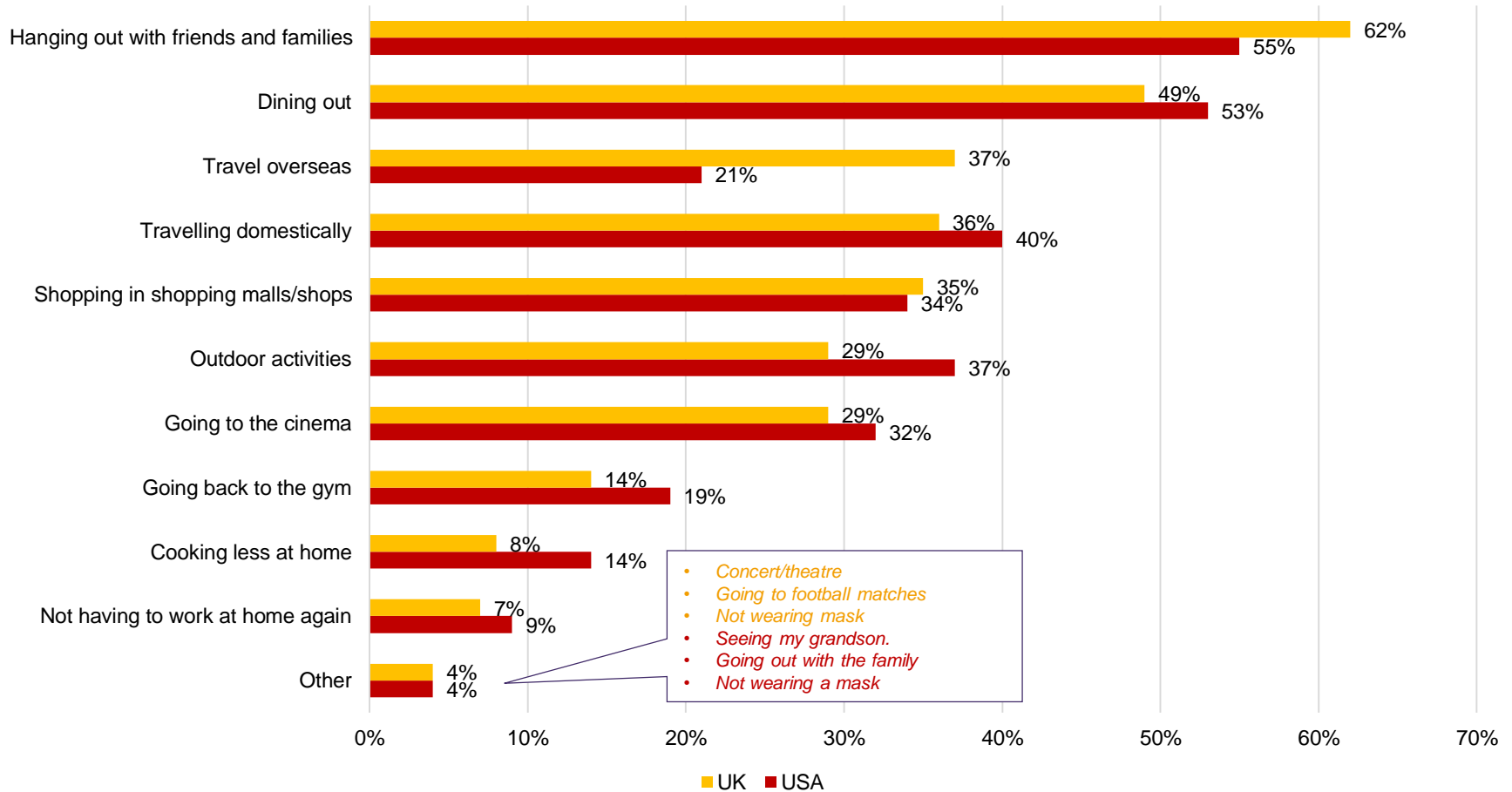
## Talking with friends and family, and watching new TV series generally keeps consumers comfortable

Q: During this difficult time, what brings you comfort?



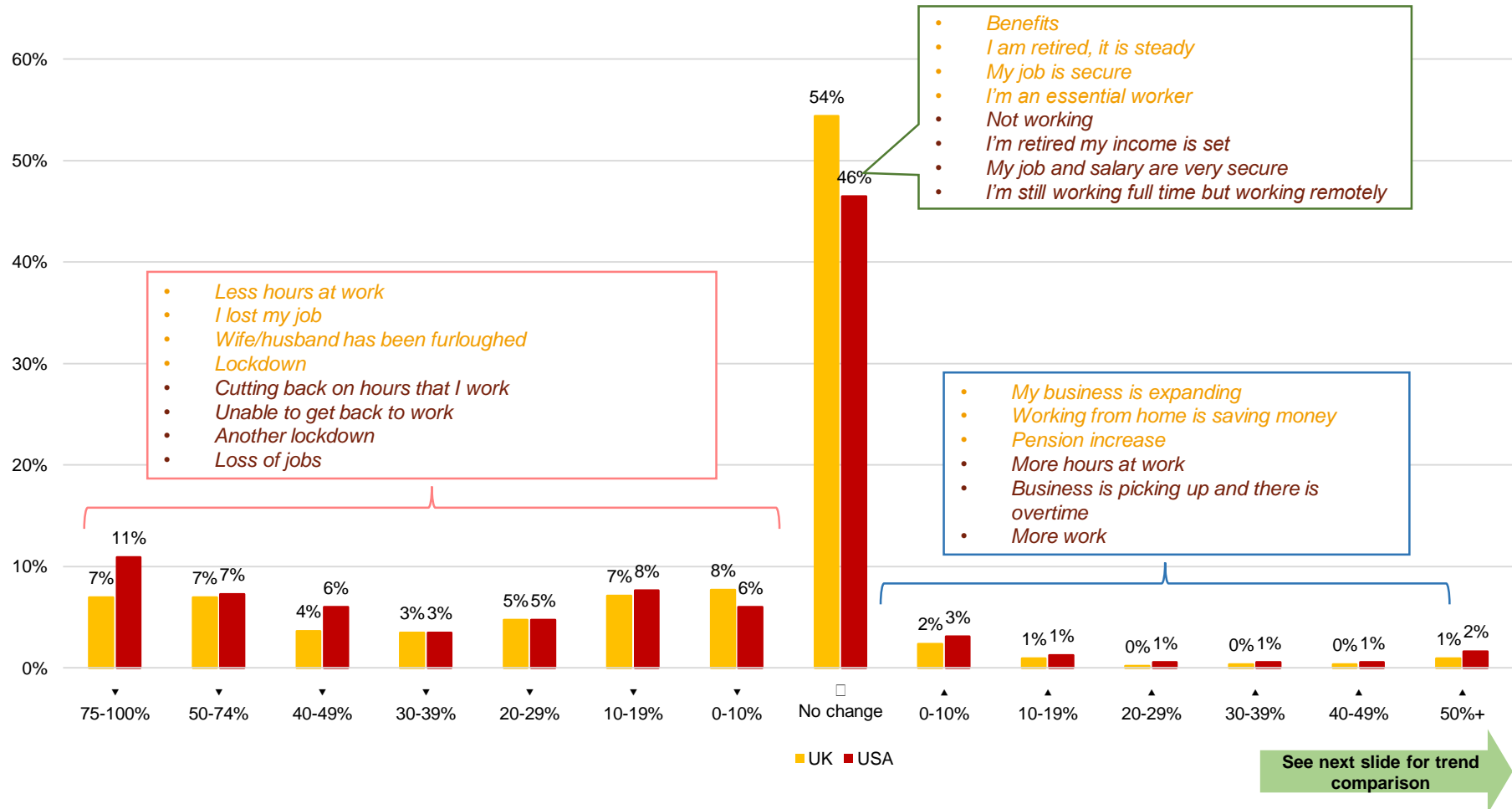
# Consumers look forward to hanging out with friends and family, dining out, and travelling overseas after COVID-19

Q: Which of the below are you most excited about, post COVID-19?  
Please select all that apply.



# Most UK consumers expect same income; more income reductions expected in USA

Q: Would you expect any change to your current household income in the near future, due to the COVID-19 crisis (including other sources of income, e.g. government support packages, investment portfolio, etc.)? If so, by how much?



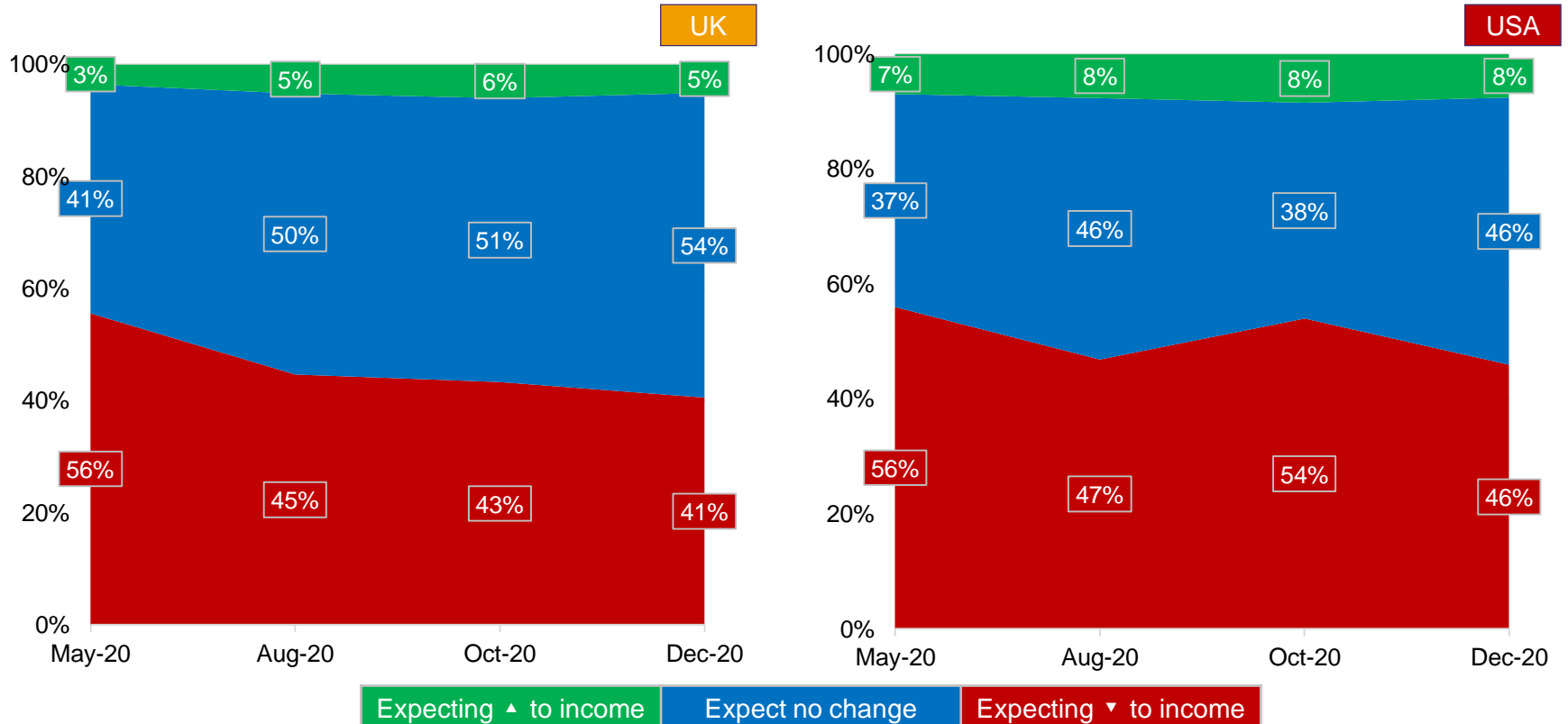
# UK consumers' income expectations remain the same; fewer USA consumers have reductions vs. October 2020

Trend comparison

## UK consumers' income expectations did not change

## More USA consumers are now expecting no change in income

Q: Would you expect any change to your current household income in the near future, due to the COVID-19 crisis (including other sources of income, e.g. government support packages, investment portfolio, etc.)? If so, by how much?



Margin of error: 10 p.p. for expecting decrease, 4 p.p. for expecting no change and 1 p.p. for expecting increase

# Overall, consumers are expecting to spend less across categories, opting for increased savings and investments

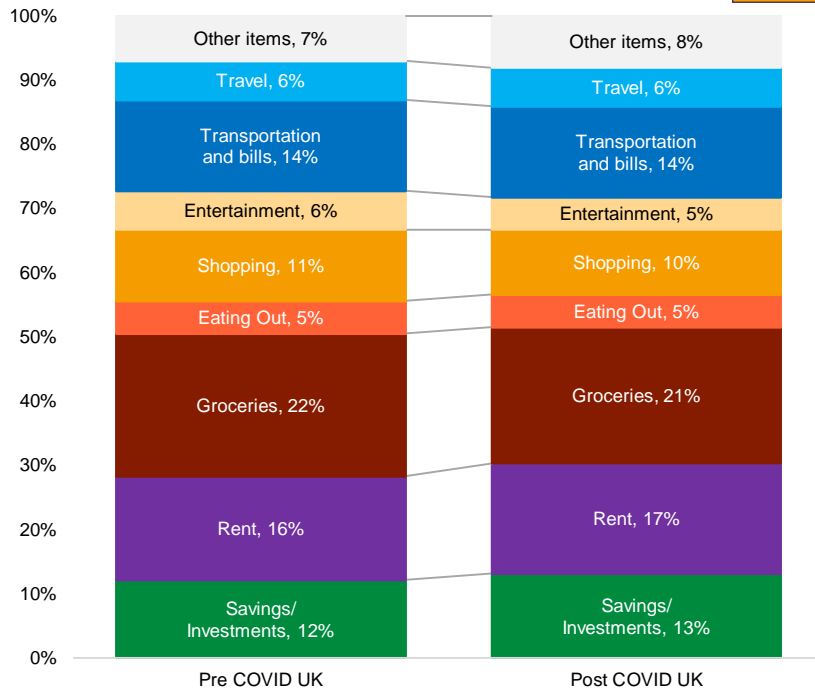
## UK consumers expect to spend less on entertainment and shopping and increase savings/investments and rents

## USA consumers expect to spend less on eating out and rent and increase savings/investments

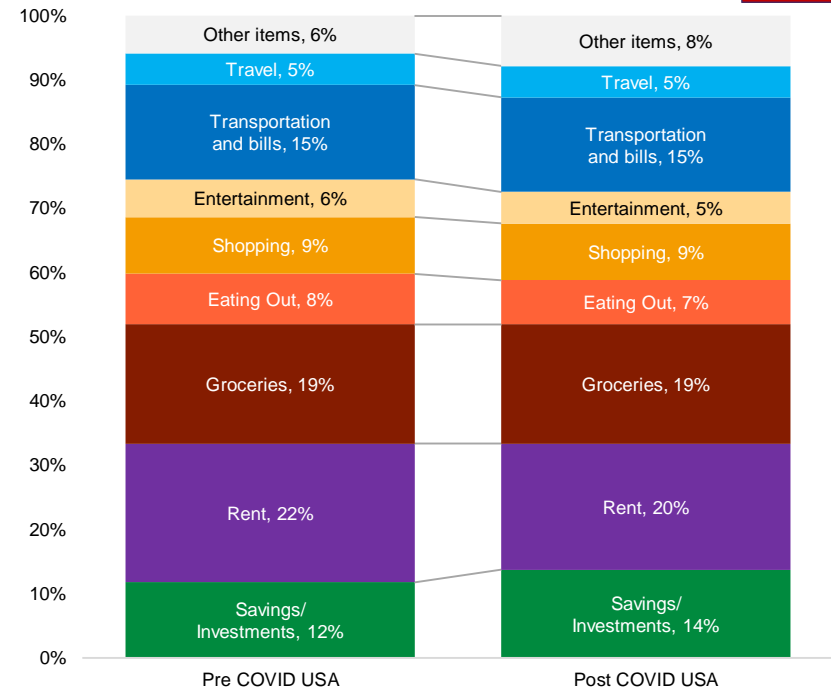
Q-before: How have you allocated your income (in %) to each of the following items, prior to the COVID-19 crisis?

Q-after: Thinking about the near future, considering any expected changes in your income, how would you allocate your expected future income (in %) to each of the following items?

UK



USA



See next slide for trend comparison

# Both UK and USA consumers are expecting to spend less on rent than in October 2020

Trend comparison

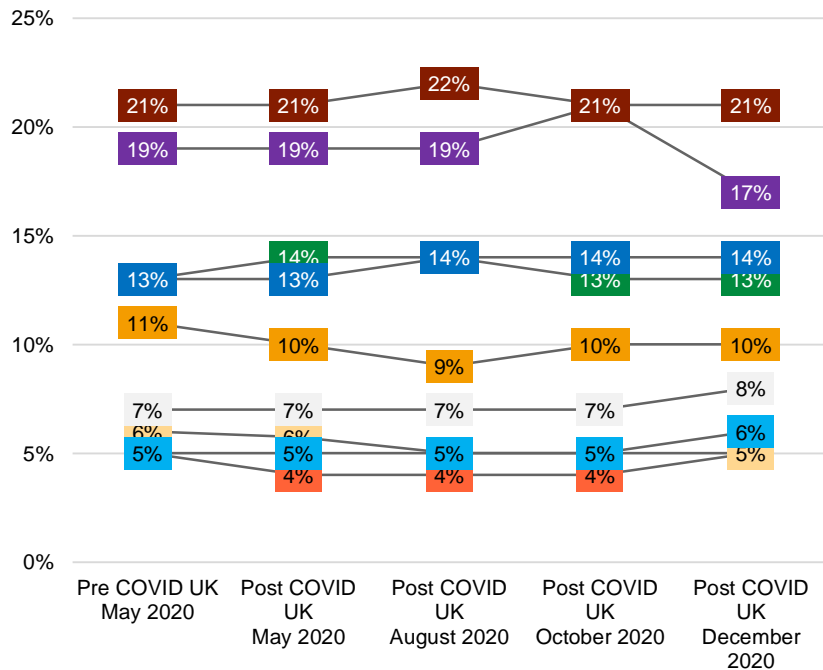
## UK consumers expecting to spend less on rent and more on eating out and travel

## USA consumers are expecting to spend more across most categories and less on rent

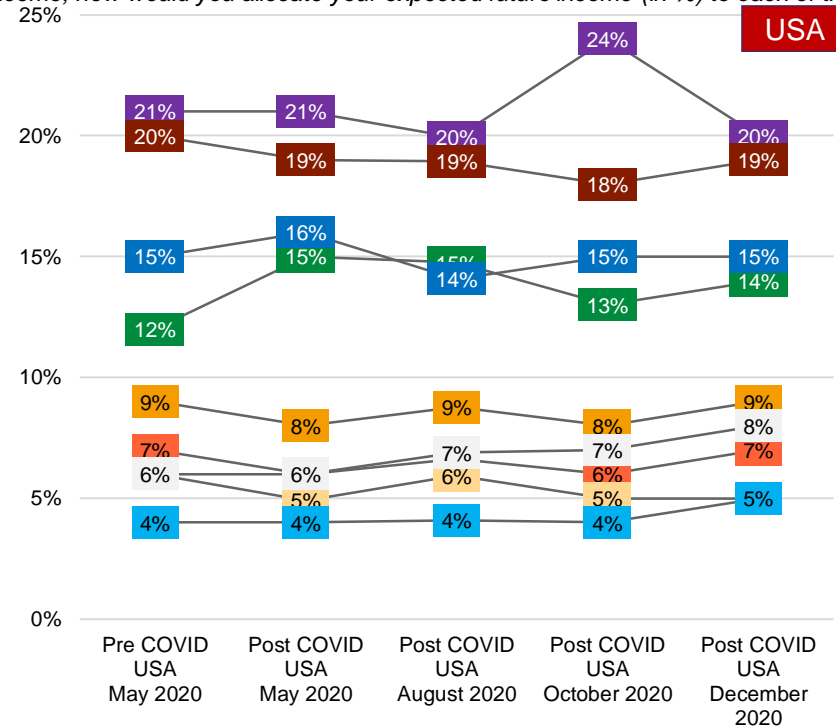
Q-before: How have you allocated your income (in %) to each of the following items, prior to the COVID-19 crisis?

Q-after: Thinking about the near future, considering any expected changes in your income, how would you allocate your expected future income (in %) to each of the following items?

UK



USA



Savings/ investments	Rent	Groceries	Eating out	Shopping
Entertainment	Transportation and bills	Travel	Other items	



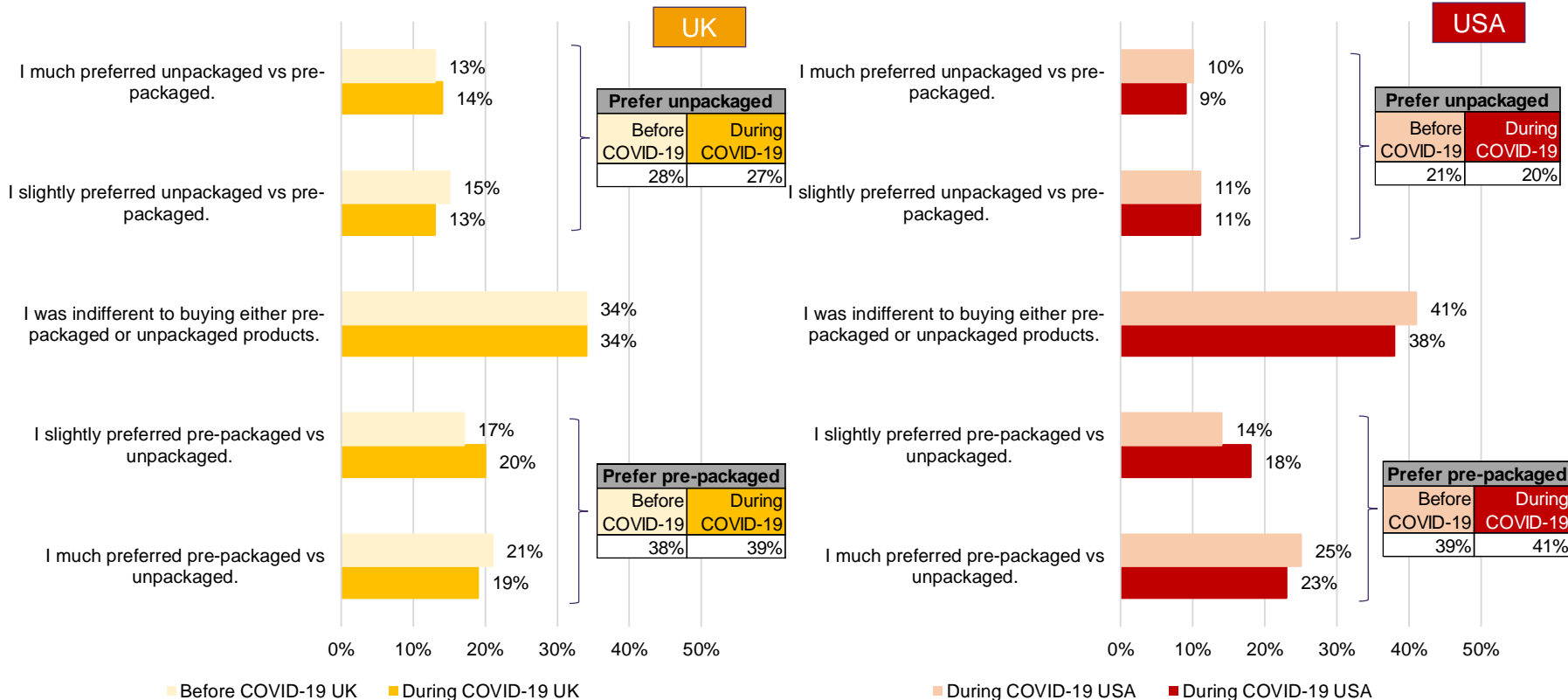
# **Additional sustainability questions: Sustainable Packaging**

# Most consumers' choice of product packaging did not change during COVID-19

## Most UK consumers' choice of products did not change during COVID-19

## Most USA consumers' choice of products did not change during COVID-19

Q: Before and during COVID-19, how did the choice of pre-packaged vs unpackaged products (e.g. fresh produce) affect your buying decisions?



# Consumers share different opinions on pre-packaged products; most believe that recycling household waste is important

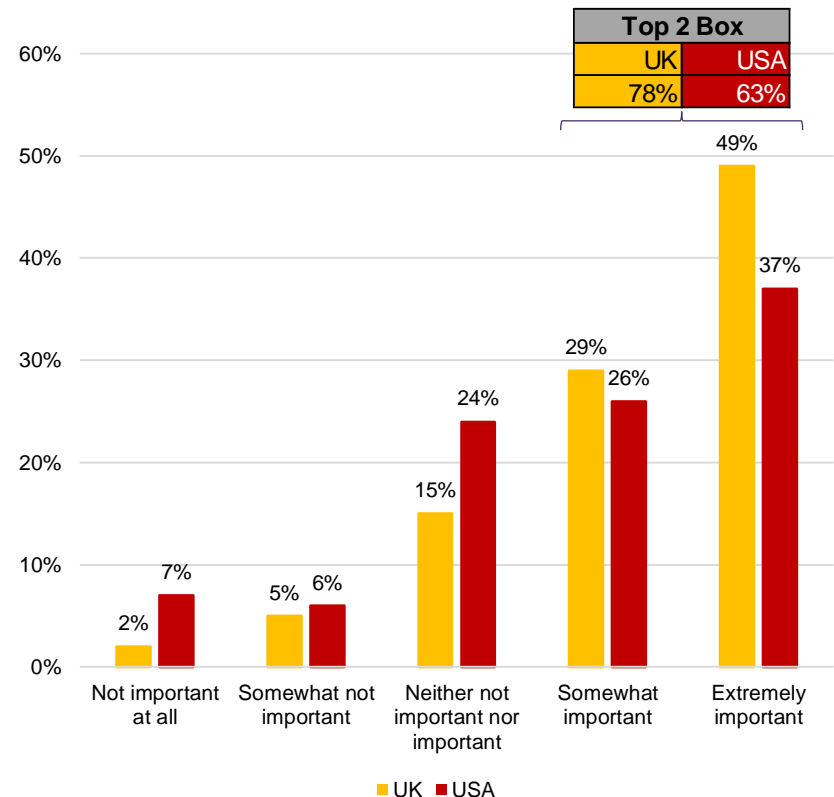
## Consumers share different opinion on pre-packaged vs unpackaged products

Q: Could you explain your choice of pre-packaged vs unpackaged products before and after COVID-19 began?

- *I think packaged is better due to COVID-19.*
- *It makes me feel safer and cleaner knowing no one has touched the contents of the pack.*
- *Always preferred unpackaged or paper bags or own reusable than packaged goods.*
- *Fears of COVID spread make me now get packaged.*
- *I have always felt strongly on the overuse of excess packaging*
- *I bought unpackaged before it begin and currently.*
- *I used to like pre-packaged prior to COVID-19 because it was more convenient. Now I am beginning to use more unpackaged over my concern for the environment and sustainability.*
- *Pre-packaged is safer.*
- *I like both. I just need to wash the produce.*
- *I don't really care about the packaging in either timeframe.*

## Majority of consumers think that recycling household waste is important

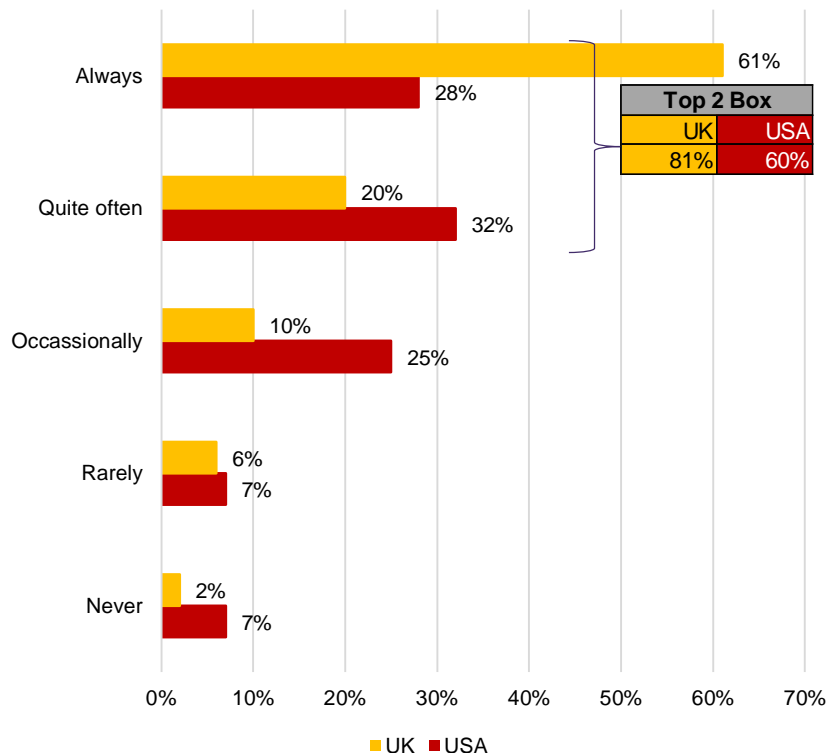
Q: How important is recycling your household's waste to you?



# UK consumers generally recycle more consistently than USA consumers

## UK consumers generally recycle more consistently than USA consumers

Q: How often do you recycle your household's recyclable waste?



## Most consumers recycle to do their part for the environment

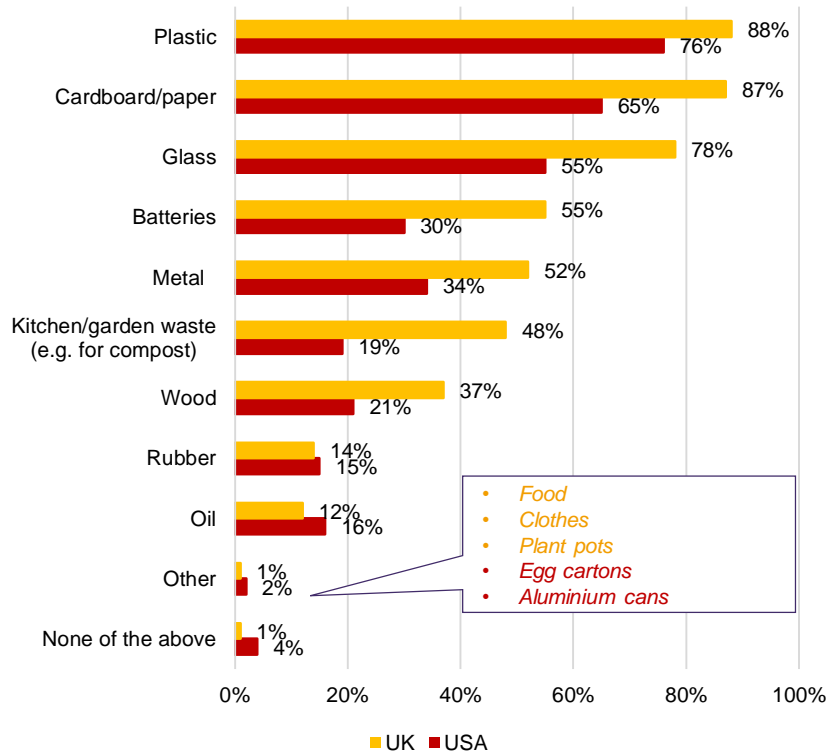
Q: What is the reason for your household's recycling frequency?

- *It saves the planet and helps the fight against waste.*
- *It is better for the environment if you recycle.*
- *To do my part on climate change and not using landfill.*
- *Just do my bit for the environment.*
- *It's something I have always done.*
- *Stops it going to landfill, saves on waste, excess food can be reprocessed into other meals for the day after*
- *We recycle when we can which is often. We want to help recycle products to do our part for the environment. I am trying to set a good example for my family and friends and neighbours.*
- *Help protect environment.*
- *To save on pollution on the earth.*
- *Trying to do what we can for the environment.*
- *To help improve the state of the environment.*
- *We just try to take care of the planet and do our part because its not very difficult to recycle*

# Majority of consumers think it is important that products they buy use recyclable packaging

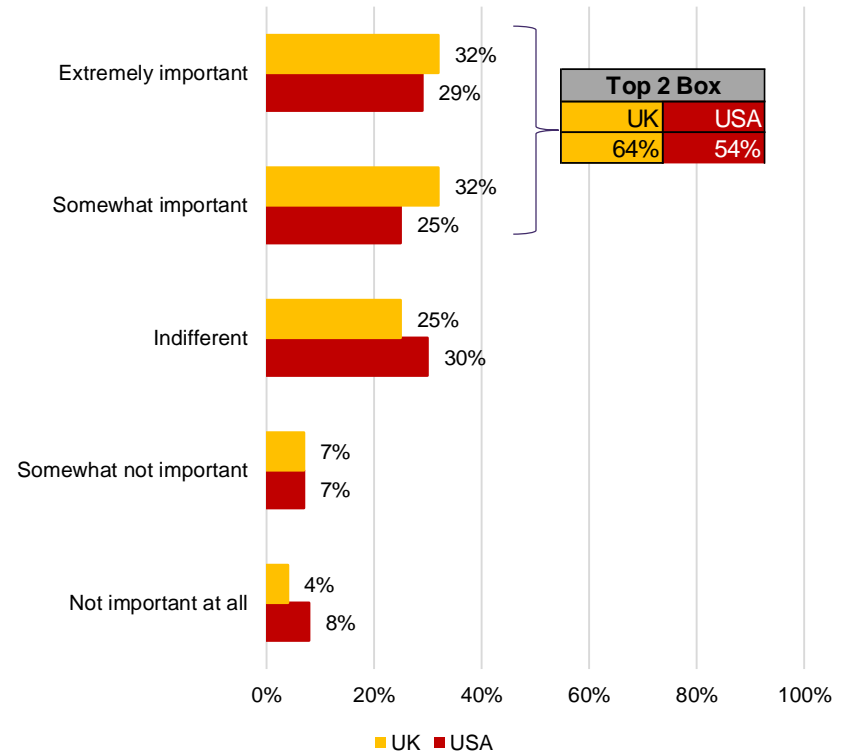
## Plastics, cardboard/paper, and glass are most common recyclables in both the UK and USA

Q: What materials do you recycle in your household? Please select all that apply.



## Majority of consumers think it is important that products use recyclable packaging

Q: How important is it that the products you buy use recyclable packaging?

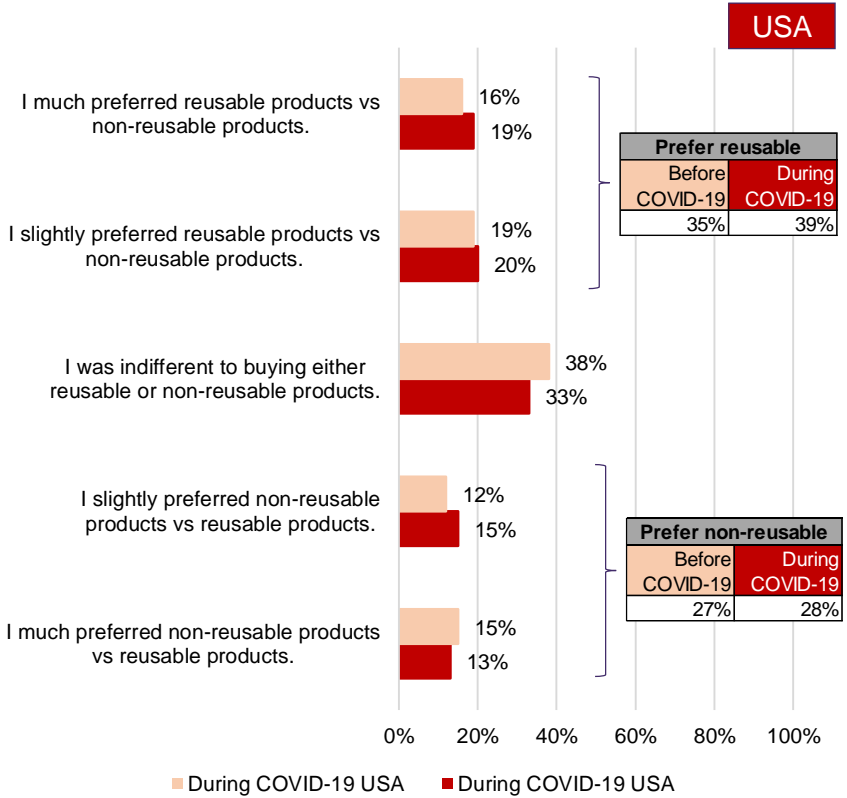
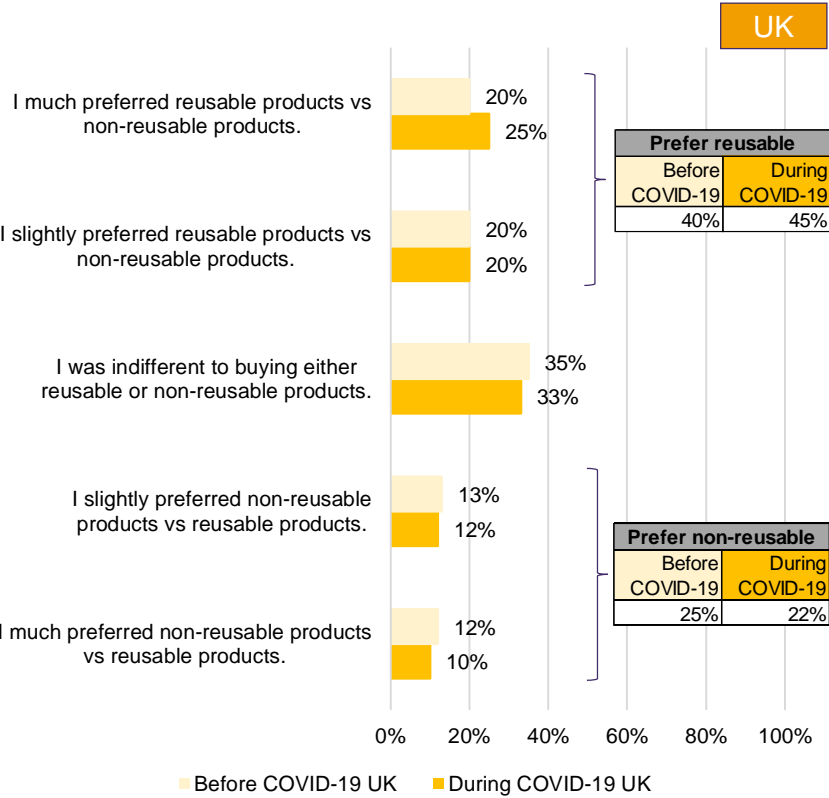


# More consumers prefer using reusable products during COVID

## UK consumers who prefer reusable products increased during the pandemic

## USA consumers who prefer reusable products also increased during this time

Q: Before and during COVID-19, how did the option of refillable/reusable products (e.g. refillable hand wash dispenser) vs non-reusable affect your purchasing decisions?



%s in this report are out of the total sample. Margin of error: 3 p.p.

# Most consumers use refillable/reusable products due to environmental and cost-saving reasons

---

Q: Could you explain your choice of refillable/reusable products vs non-reusable before and after COVID-19 began?

- *It is good for storage and reduces waste.*
- *Better to reuse than rebuy.*
- *I want to try and reduce waste and cost.*
- *No change between usage.*
- *The price of reusable can be expensive.*
- *Cost is the main factor when it comes to shopping.*
- *It's more cost effective and environmentally friendly.*
- *COVID-19 has convinced me that it is important to use sustainable products like reusable ones.*
- *Reusable are very safe and convenient way to save time and money.*
- *Makes no difference about virus. Why not want something you can use again.*
- *I've always used reusable water bottles and things of that nature. I have a problem with one time use plastics so I like to have reusable items.*
- *Reusable containers could be contaminated by COVID 19 because it was previously used by other people.*
- *It saves money to buy refills.*

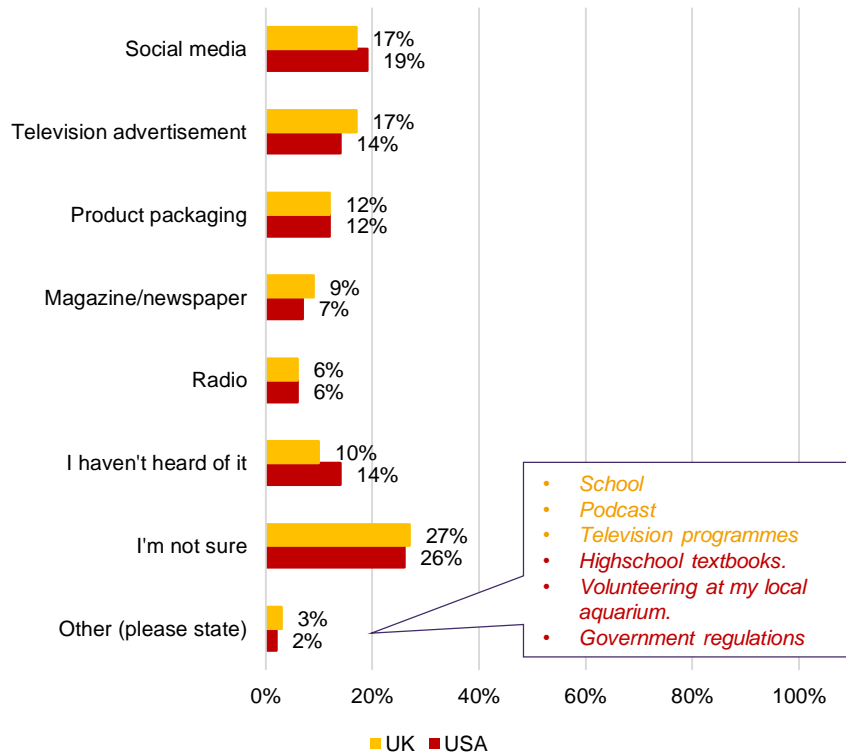


# **Additional sustainability questions: Sustainable Sourcing**

# Most consumers think that being environmentally friendly is the most important aspect of sustainable sourcing

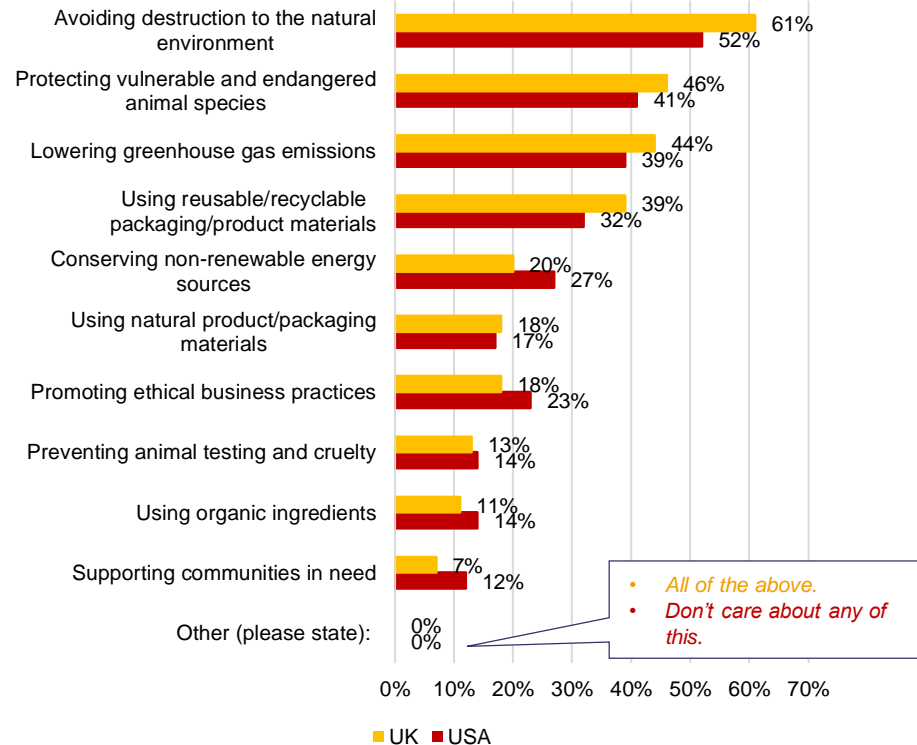
## Most consumers don't know how they are aware of the term 'sustainable sourcing'

Q: How did you first hear about the concept of 'sustainable sourcing'?



## Consumers think that being environmentally friendly is the most important aspect of sustainable sourcing

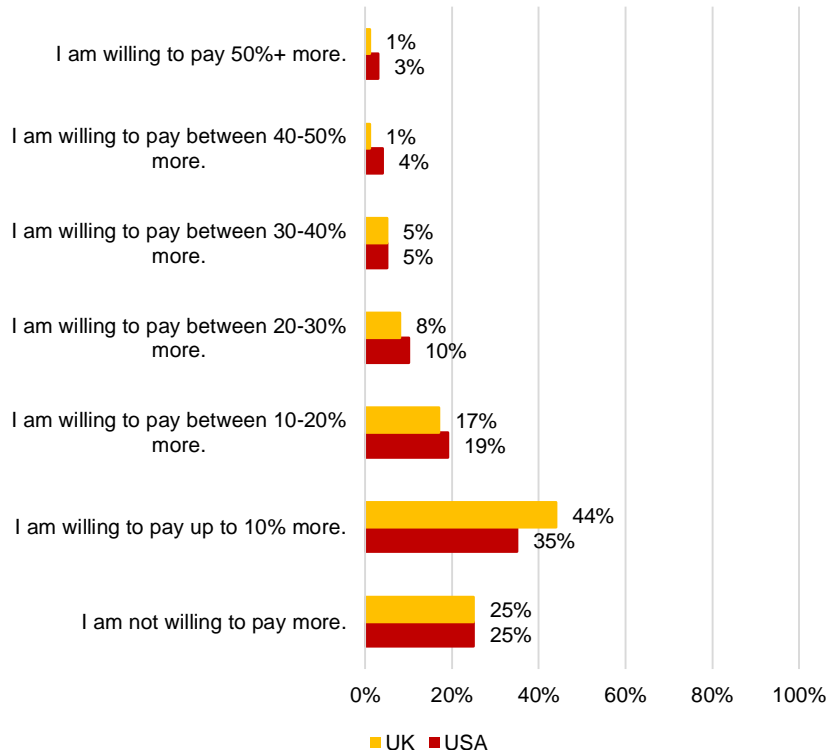
Q: What are the most important aspects of sustainable sourcing when it comes to Consumer Packaged Goods? Please choose up to 3 responses.



# Consumers will pay more for sustainably sourced products; suppliers held most accountable for sustainable sourcing

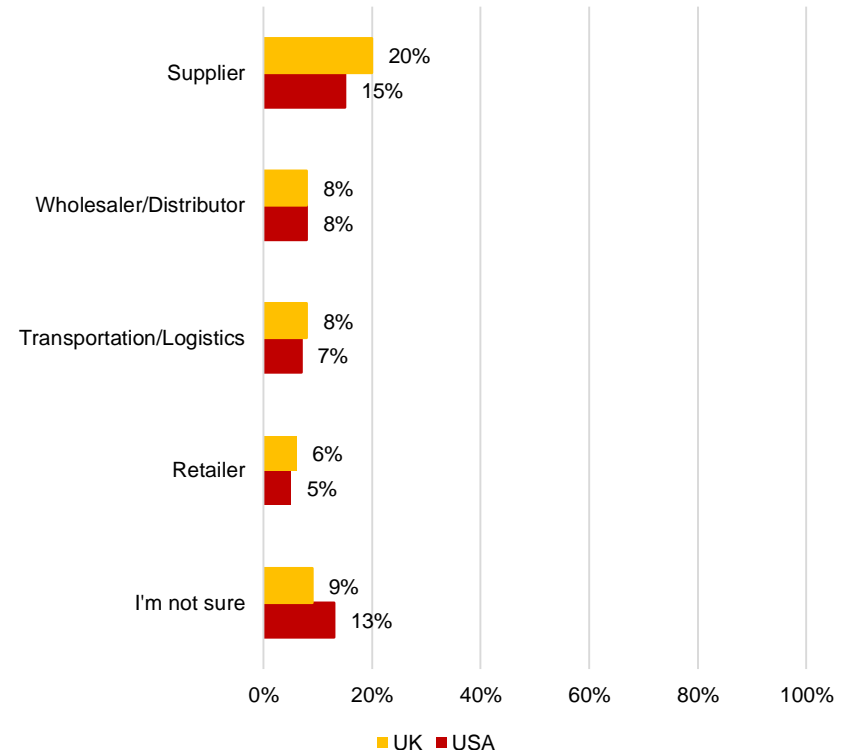
## Most consumers are willing to pay at least 10% more for a product that is sustainably sourced

Q: How much **more** would you be willing to pay for a product that is sustainably produced?



## Consumers believe suppliers are the most responsible for ensuring sustainable sourcing

Q: Which of the following stakeholders do you believe should be most responsible for ensuring the sustainable sourcing of Consumer Packaged Goods (Fast Moving Consumer Goods)?



# Consumers believe the manufacturer/supplier is most responsible for sustainable sourcing as they control the production process

---

*Q: What is the reason for your choice?*

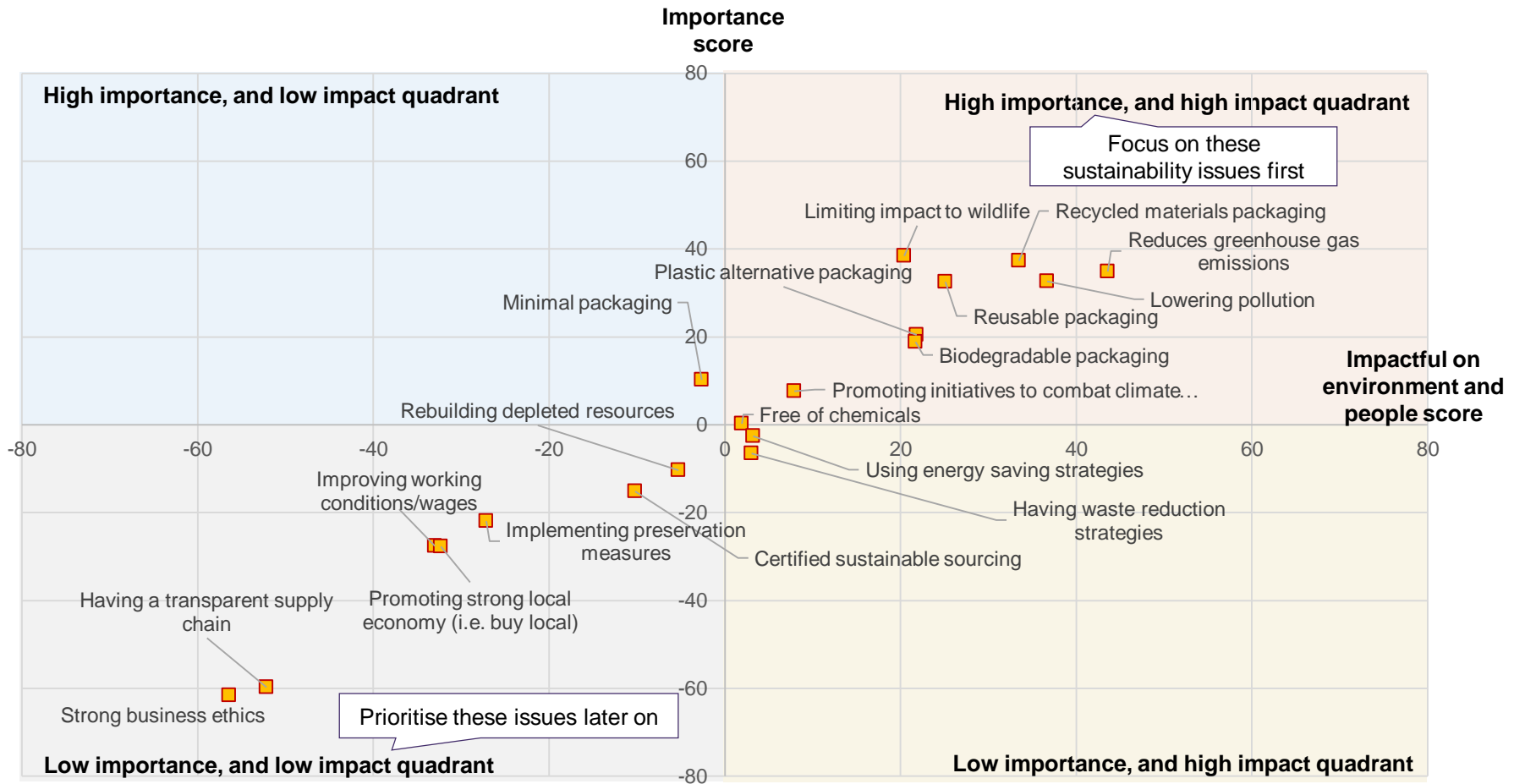
- *They are the one creating the product.*
- *Supplier dictates product requirements to supply to the market.*
- *Everyone has their own responsibility in ensuring all the products are environment friendly.*
- *The company who produces items should bear responsibility for ensuring their products are not harmful to the planet.*
- *They are the person making the product and therefore the decisions regarding where it is sourced.*
- *The manufacturer is the first step on the process if they follow the lead everyone else will too.*
- *The manufacturer is the one that actually uses the supplies. They should only purchase and use supplies that are sustainable.*
- *The manufacturer needs to make sure that the products supplied to it are sustainably sourced, in order to state this for its final product.*
- *The manufacturing process often produces unnecessary waste.*
- *They are in control with what they use to make their product.*



# **MaxDiff on Sustainability Topic**

# UK consumers believe that reducing greenhouse gas emissions is most important and impactful to sustainability

UK



# USA consumers believe that lowering pollution has the highest importance and highest impact on sustainability

USA

