SHOPPING DURING THE PANDEMIC

A Global Advisor surve

21 January, 2021

GAME CHANGERS



https://www.ipsos.com/en/how-shopping-and-eating-out-has-changed-during-pandemic

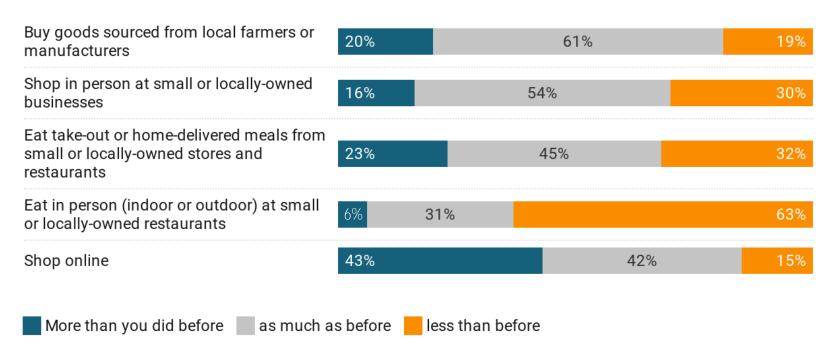
SHOP

OVERVIEW

GLOBALLY, PEOPLE **DID NOT CHANGE** THEIR SHOPPING HABITS AT SMALL OR LOCALLY-OWNED BUSINESSES DURING THE PANDEMIC, EXCEPT FOR EATING IN-PERSON AT RESTAURANTS.

HOWEVER, THEY MASSIVELY WENT SHOPPING ONLINE.

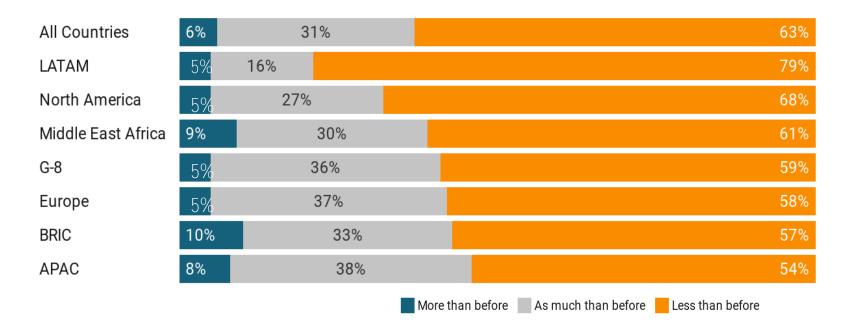
All countries



Q: Since the COVID outbreak, have you been doing each of the following more often, less often, or just as often as you did before

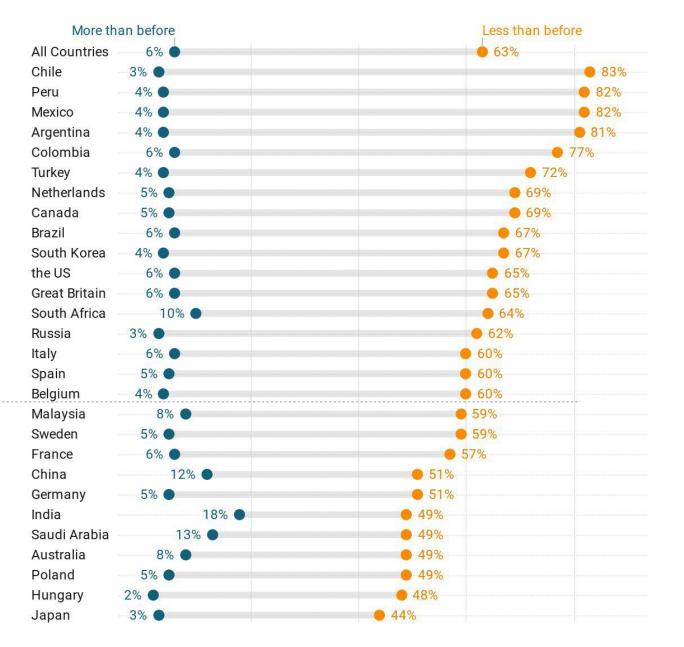
EATING IN-PERSON AT SMALL OR LOCALLY-OWNED RESTAURANTS

PEOPLE HAVE BEEN EATING IN-PERSON AT SMALL **OR LOCALLY-**OWNED RESTAURANTS SIGNIFICANTLY LESS SINCE THE COVID OUTBREAK, **ESPECIALLY IN** LATAM AND NORTH AMERICA.



Q: Since the COVID outbreak, have you been doing each of the following more often, less often, or just as often as you did before – Eat in-person (indoor or outdoor) at small or locally-owned restaurants.



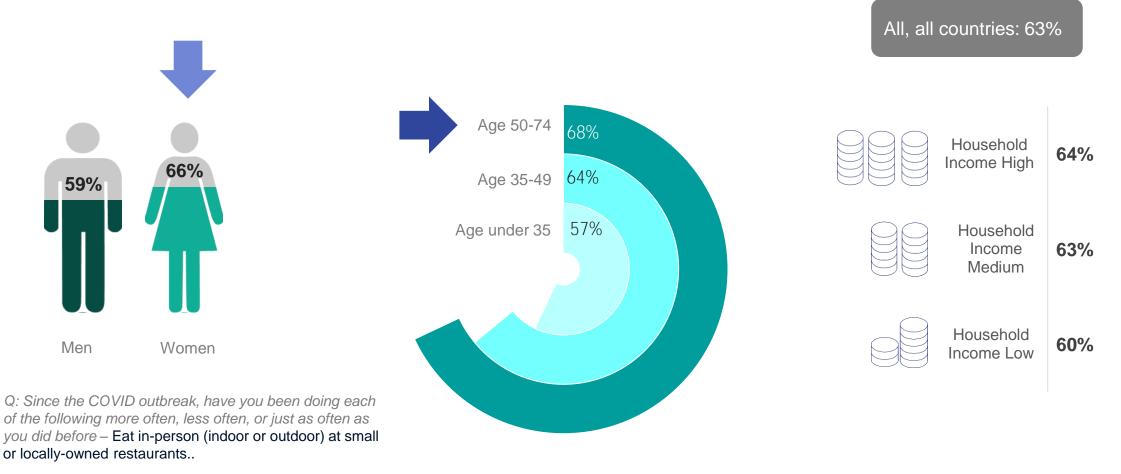


MORE THAN 80% OF PEOPLE IN CHILE, PERU, MEXICO, AND ARGENTINA SAY THEY'VE EATEN LESS IN-PERSON (INDOOR OR OUTDOOR) AT SMALL OR LOCALLY-OWNED RESTAURANTS.

Q: Since the COVID outbreak, have you been doing each of the following more often, less often, or just as often as you did before – Eat in-person (indoor or outdoor) at small or locally-owned restaurants



WORLWIDE, 68% OF THOSE AGED 50-74 AND 66% OF WOMEN SAY THEY'VE BEEN EATING LESS IN-PERSON AT SMALL OR LOCALLY-OWNED RESTAURANTS.



Base: 20,504 online adults aged 16-74 across 28 countries, 20 November – 4 December 2020



GLOBALLY, 31% SAY THEY'VE EATEN IN-PERSON AT SMALL OR LOCALLY-OWNED RESTAURANTS AS MUCH THAN BEFORE SINCE THE COVID OUTBREAK.

53% OF THE JAPANESE HAVE NOT CHANGED THEIR EATING-OUT HABITS.

Q: Since the COVID outbreak, have you been doing each of the following more often, less often, or just as often as you did before – Eat inperson (indoor or outdoor) at small or locallyowned restaurants - as much as before.

All Countries	31%		
Japan			53
Hungary			50%
Poland		46%	
Germany		44%	
Australia		43%	
Saudi Arabia	38%		
China	38%		
France	38%		
Sweden	37%		
Belgium	36%		
Spain	35%		
Russia	35%		
Italy	34%		
Malaysia	33%		
India	32%		
South Korea	30%		
the US	29%		
Great Britain	29%		
South Africa	26%		
Brazil	26%		
Netherlands	26%		
Canada	26%		
Turkey	24%		
Colombia	17%		
Argentina	15%		
Peru	14%		
Mexico	14%		
Chile	14%		



2. EAT TAKE-OUT OR HOME-**DELIVERED MEALS FROM SMALL OR LOCALLY-OWNED STORES AND RESTAURANTS**

USAGE OF TAKE-OUT AND HOME-DELIVERY MEALS FROM SMALL OR LOCAL RESTAURANTS HAS STAYED THE SAME OR INCREASED IN ALL REGIONS.

THE INCIDENCE OF CONSUMERS REPORTING A DECREASE IS HIGHEST IN MIDDLE EAST- AFRICA, LATAM AND BRICS.

All Countries	23%	45%	32%
Europe	20%	53%	27%
G-8	21%	51%	28%
APAC	19%	50%	30%
North America	27%	44%	28%
BRIC	19%	43%	38%
Middle East Africa	17%	35%	48%
LATAM	30%	32%	38%
		More than before As much th	an before 📕 Less than before

Q: Since the COVID outbreak, have you been doing each of the following more often, less often, or just as often as you did before – Eat take-out or home-delivered meals from small or locally-owned stores and restaurants



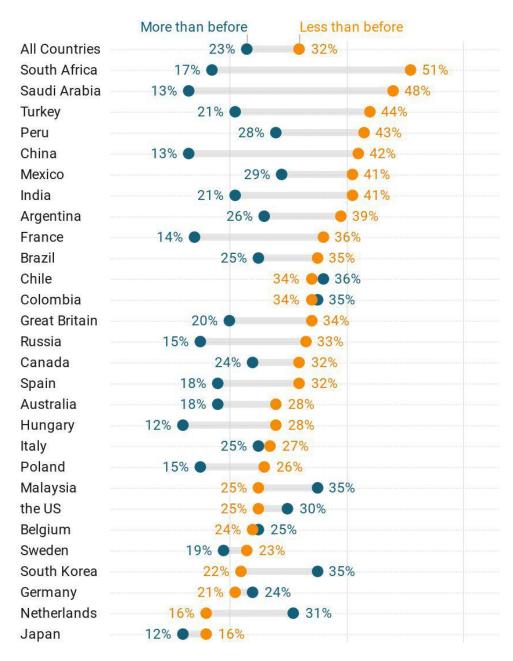
GLOBALLY 45% SAY THEY'VE EATEN AS MUCH AS BEFORE AT TAKE-OUT OR HOME-DELIVERED MEALS FROM SMALL OR LOCALLY-OWNED STORES AND RESTAURANTS.

Q: Since the COVID outbreak, have you been doing each of the following more often, less often, or just as often as you did before – Eat take-out or home-delivered meals from small or locally-owned stores and restaurants – as much as before

Base: 20,504 online adults aged 16-74 across 28 countries, 20 November – 4 December 2020

All Countries	45%	
Japan		72%
Hungary	61%	
Poland	59%	
Sweden	57%	
Germany	55%	
Australia	54%	
Netherlands	53%	
Russia	52%	
Belgium	52%	
Spain	51%	
France	50%	
Italy	48%	
Great Britain	46%	
China	45%	
the US	45%	
Canada	44%	
South Korea	43%	
Brazil	40%	
Malaysia	40%	
Saudi Arabia	39%	
India	37%	
Turkey	35%	
Argentina	35%	
South Africa	32%	
Colombia	31%	
Chile	30%	
Peru	29%	
Mexico per 2020	29%	



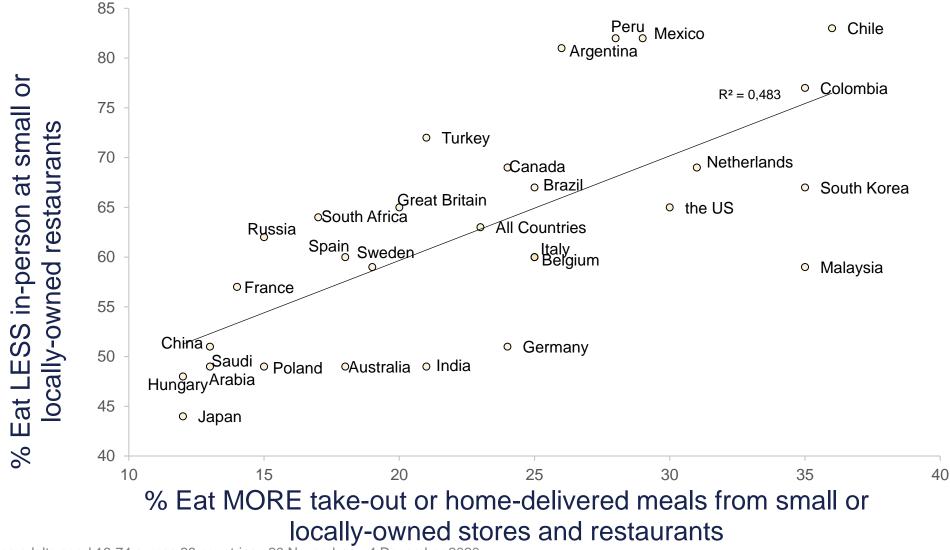


GLOBALLY, 32% SAY THEY'VE EATEN TAKE-OUT OR HOME-DELIVERED MEALS FROM SMALL OR LOCALLY-OWNED STORES AND RESTAURANTS LESS OFTEN THAN BEFORE, BUT BEHAVIOURS VARY A LOT FROM ONE COUNTRY TO ANOTHER.

Q: Since the COVID outbreak, have you been doing each of the following more often, less often, or just as often as you did before – Eat take-out or home-delivered meals from small or locally-owned stores and restaurants



THE LESS PEOPLE EAT IN-PERSON AT SMALL/LOCALLY-OWN RESTAURANTS, THE MORE THEY GET TAKEOUT/DELIVERY FROM THEM



Base: 20,504 online adults aged 16-74 across 28 countries, 20 November - 4 December 2020



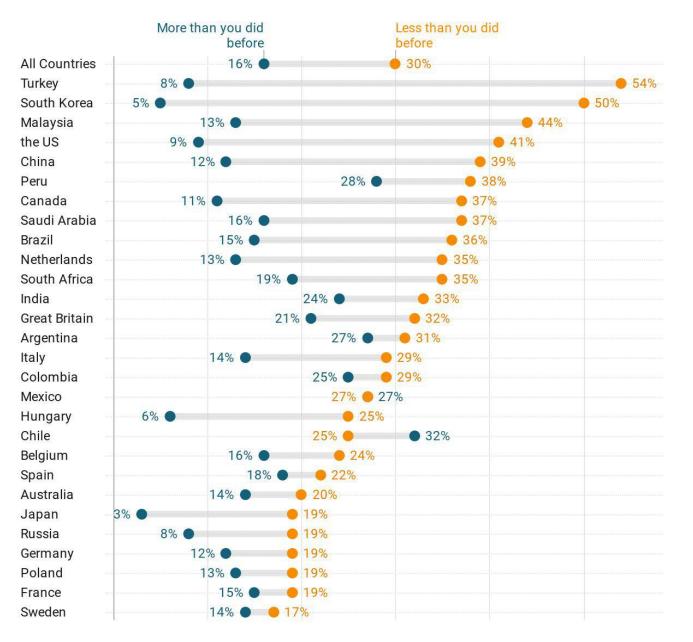
3. **SHOPPING IN-PERSON AT SMALL OR LOCALLY-OWNED BUSINESSES**

GLOBALLY, MORE THAN HALF (54%) HAVE NOT CHANGED THEIR HABITS OF SHOPPING **IN-PERSON AT SMALL OR LOCALLY-OWNED BUSINESSES, BUT** ATTITUDES DIFFER **GREATLY ACROSS** COUNTRIES.

Q: Since the COVID outbreak, have you been doing each of the following more often, less often, or just as often as you did before shop in-person at small or locally-owned businesses - as much as before

All Countries	54%		
Japan			78%
Russia		73%	
Sweden		69%	
Germany		69%	
Hungary		69%	
Poland		68%	
Australia		66%	
France		65%	
Spain	60%		
Belgium	60%		
Italy	58%		
Netherlands	52%		
Canada	52%		
the US	51%		
Brazil	49%		
Saudi Arabia	48%		
China			
Great Britain	47%		
Mexico	46%		
Colombia	46%		
South Africa	46%		
South Korea	45%		
Chile	44%		
Malaysia	43%		
Argentina	42%	% As much a	e hoforo
India	42%	70 AS MUCH a	is belore
Turkey	38%		
2020 Peru	34%		Ipsos





IN TURKEY AND SOUTH KOREA PEOPLE SAY THEY'VE SHOPPED LESS OFTEN AT SMALL SHOPS. IT IS ALSO THE CASE, IN MALAYSIA, THE U.S. AND CHINA.

IN MOST LATAM COUNTRIES (EXCEPT BRAZIL) PEOPLE SAY THEY SHOPPED LOCALLY MORE OFTEN. IT IS ALSO THE CASE, IN SMALLER PROPORTION, IN INDIA, GREAT BRITAIN AND SOUTH AFRICA.

Q: Since the COVID outbreak, have you been doing each of the following more often, less often, or just as often as you did before – shop in-person at small or locally-owned businesses

BUYING GOODS SOURCED FROM LOCAL FARMERS OR MANUFACTURERS

GLOBALLY, THE HABIT OF BUYING GOODS SOURCED FROM LOCAL FARMERS OR MANUFACTURERS HAS REMAINED STABLE (61%).

HOWEVER, TWO GROUPS OF COUNTRIES SHOW EITHER INCREASE OR DECREASE IN THIS TYPE OF PURCHASE.

Q: Since the COVID outbreak, have you been doing each of the following more often, less often, or just as often as you did before – Buy goods sourced from local farmers or manufacturers

Base: c. 20504 online interviews across 28 countries, 20 November – 4 December 2020.

All Countries	61%	
Japan	84%	6
Sweden	77%	
Poland	73%	
Germany	73%	
Hungary	72%	
the US	71%	
Netherlands	70%	
Russia	70%	
Australia	69%	
Belgium	68%	
Spain	68%	
Canada	65%	
Great Britain	65%	
France	63%	
Italy	63%	
South Korea	62%	
Malaysia	58%	
Brazil	56%	
China	56%	
Turkey	55%	
South Africa	53%	
Mexico	50%	
Argentina	47%	
Saudi Arabia	47%	
India	45%	
Colombia	44%	
Chile	44%	
Peru	37%	

THE FREQUENCY OF BUYING GOODS SOURCED FROM LOCAL FARMERS OR MANUFACTURERS HAS INCREASED IN INDIA AND MOST LATAM COUNTRIES.

HOWEVER, IT HAS DECREASED IN SAUDI ARABIA, ARGENTINA, SOUTH KOREA, AND CHINA.

Q: Since the COVID outbreak, have you been doing each of the following more often, less often, or just as often as you did before – Buy goods sourced from local farmers or manufacturers

Base: 20,504 online adults aged 16-74 across 28 countries, 20 November – 4 December 2020

	Less than before M	ore than before	
All Countries	19% 🎃	20%	
India	20% 🔶	• 35	%
Peru		30% 🔴 🌑 33%	
Colombia	25%	6 🔴 🕚 31%	
Mexico	20% 🔴	• 30%	
Chile	2	7% 🔴 29%	
South Africa	20% 🔴	• 27%	
France	12% 🔴	• 25%	
Turkey	21% 🔴	• 25%	
Malaysia	19% 🔴	• 23%	
Belgium	10% 🔴	22%	
Brazil	22%	22%	
Italy	16% 🔴 🔴	21%	
Argentina	20% 🔵	9 32%	
Australia	13% 🔴 🌒 1	9%	
Canada	16% 🔴 🌑 1	9%	
Spain	12% 🔴 🕚 1	9%	
China	18% 🌑	e 26%	
Netherlands	12% 🔴 🕚 18	3%	
Great Britain	17% 🌔 18	3%	
Poland	13% 🔴 15%		
Germany	13% 🌖 14%		
Saudi Arabia	14% 🔵		38%
Sweden	9% 🔴 🕚 14%		
the US	13% 🔵 🔴 16%	þ	
Hungary	12% 🌒 🔴 16%	5	
South Korea	11% 🔴	• 27%	
Russia	8% 🔵	22%	
Japan	5% 🔵 🛛 🔴 12%		



5. Shopping online

GLOBALLY, 43% REPORT HAVING SHOPPED ONLINE MORE OFTEN.

NORTH AMERICA AND LATAM COUNTRIES SHOW THE LARGEST INCREASES.

All Countries	43%	42%	15%
North America	50%	41%	
LATAM	46%	29%	25%
Middle East Africa	44%	34%	22%
BRIC	42%	42%	16%
APAC	41%	47%	12%
G-8	41%	49%	
Europe	40%	50%	10%
	More than befo	ore 📃 As much than before 📒 Les	ss than before

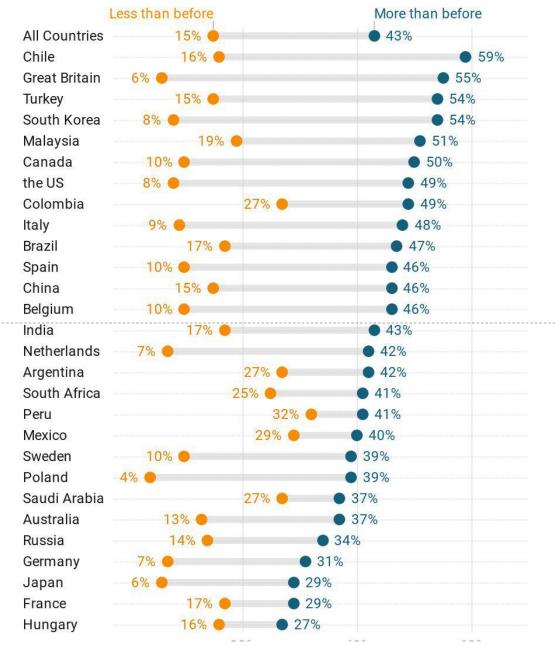
Q: Since the COVID outbreak, have you been doing each of the following more often, less often, or just as often as you did before – shop online.



PEOPLE IN CHILE, GREAT BRITAIN, SOUTH KOREA, AND MALAYSIA ARE THOSE MOST LIKELY TO SAY THEY'VE SHOPPED ONLINE MORE THAN BEFORE SINCE THE COVID OUTBREAK.

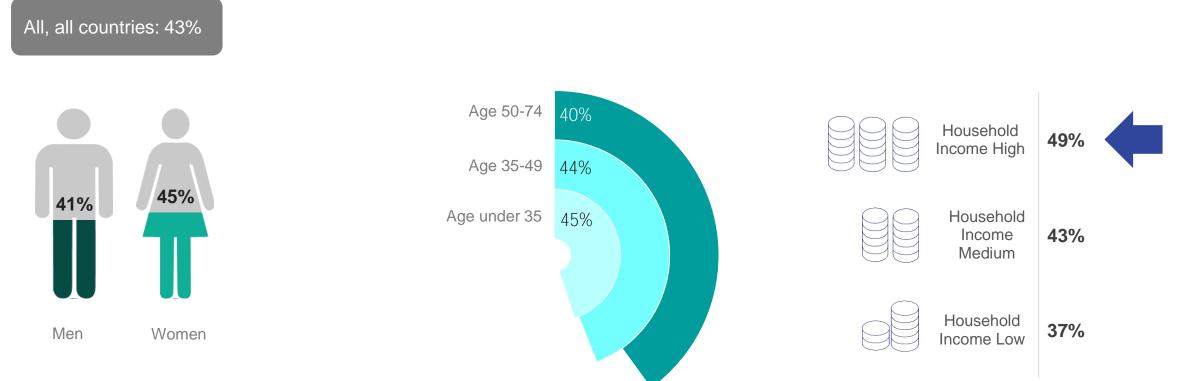
Q: Since the COVID outbreak, have you been doing each of the following more often, less often, or just as often as you did before – shop online.

Base: 20,504 online adults aged 16-74 across 28 countries, 20 November – 4 December 2020





HIGH-INCOME HOUSEHOLDS SHOW THE MOST SIGNIFICANT INCREASE IN ONLINE SHOPPING.



Q: Since the COVID outbreak, have you been doing each of the following more often, less often, or just as often as you did before – shop online more than before.



Technical note

These are the results of a 28-market survey conducted by Ipsos on its Global Advisor online platform. Ipsos interviewed a total of 20,504 adults aged 18-74 in the United States, Canada, Malaysia, South Africa, and Turkey, and 16-74 in 22 other markets between Friday, November 20 and Friday, December 4, 2020.

The sample consists of approximately 1,000 individuals in each of Australia, Belgium, Brazil, Canada, mainland China, France, Germany, Great Britain, Italy, Japan, Spain, and the U.S., and 500 individuals in each of Argentina, Chile, Hong Kong, Hungary, India, Malaysia, Mexico, the Netherlands, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Sweden, and Turkey.

The samples in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, the Netherlands, Poland, South Korea, Spain, Sweden, and the U.S. can be taken as representative of their general adult population under the age of 75.

The samples in Brazil, Chile, mainland China, Hong Kong, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa, and Turkey are more urban, more educated, and/or more affluent than the general population. The survey results for these countries should be viewed as reflecting the views of the more "connected" segment of their population.

The data is weighted so that each country's sample composition best reflects the demographic profile of the adult population according to the most recent census data. Where results do not sum to 100 or the 'difference' appears to be +/-1 more/less than the actual, this may be due to rounding, multiple responses, or the exclusion of "don't know" or not stated responses.

The precision of Ipsos online polls is calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points and of 500 accurate to +/- 5.0 percentage points. For more information on Ipsos' use of credibility intervals, please visit the Ipsos website.

