GLOBAL STUDY

# A YEAR OF LOCKDOWNS...

... and how they changed consumers around the world.



WEAREMIQ.COM

How consumers have adapted to a year in lockdown, finding new ways to live, work, shop, learn, and keep themselves entertained.

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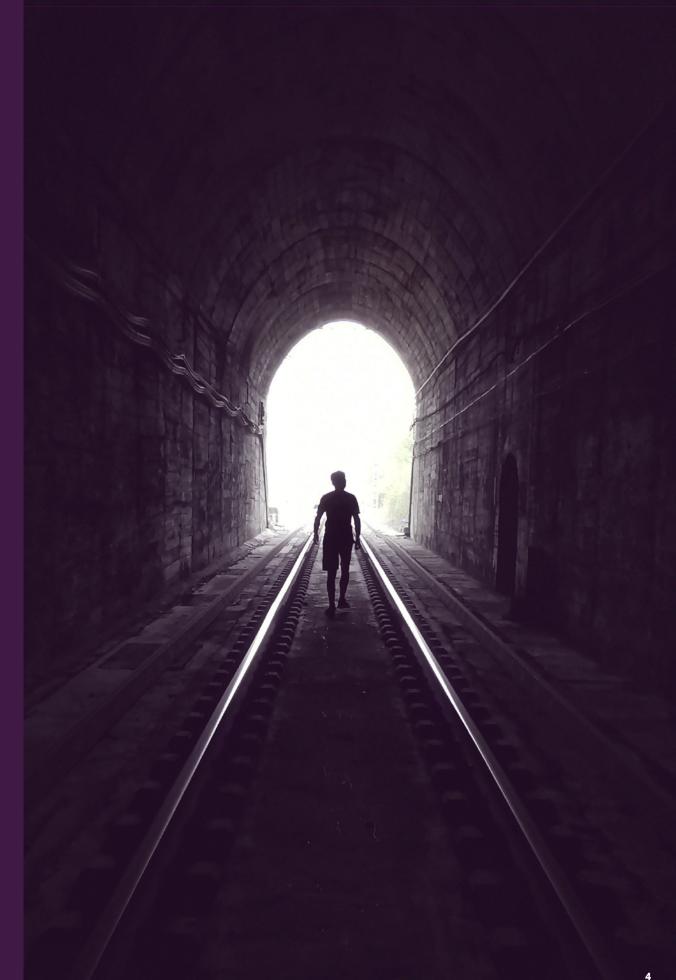
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What changes are likely to be temporary and what's likely to stick around for the long-term.

Five new groups of consumers created by the year in lockdown and what marketers need to know about them.





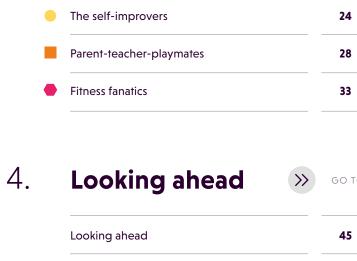


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## Introduction

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A note on our methodology

The last year has changed a lot of things. Lockdowns, social distancing and other efforts to lessen the spread of COVID-19 have all made an enormous impact on the way we live, work, and interact. And, though the specific rules and measures around stopping the spread have differed country by country, around the world the picture is broadly similar. From March 2020 through to March 2021, there were a lot more people staying inside and minimizing contact with others.

The way people around the suddenly working from home, world have adapted to the dealing with homeschooling changes brought about by and child-care, even the pandemic have been having difficulties making remarkably similar too. This arrangements for basics like shouldn't be surprising. The food, cleaning products and changes we've seen in global other household essentials. human behavior accord But over the course of the with the theory of adaptive expectation, coined by the year, people around the economist AW Phillips who world have adapted. In this said that individuals generally study, we look at consumer adjust their expectations of behavior from people in the future based on recent North America, in Europe, in past experiences and events.

Looking back across the last year of lockdowns, we can see this happening in countries across the world. In the spring of 2020, people were in shock: panic shopping, overwrought by

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- s. subcontinental and South East Asia, and in Australasia, and see a notable similarity in the way they have responded to a year marked by lockdowns.
- Using this analysis, we've put together this report outlining the major ways

people around the world have changed as consumers. By studying the fluctuations across the year, we also make some predictions about what changes are likely to be permanent and which will fade away. And, finally, we look at a series of new consumer groups created by the year in lockdown that marketers need to be aware of as they plan their strategies for 2021 and beyond.

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#### A NOTE ON METHODOLOGY

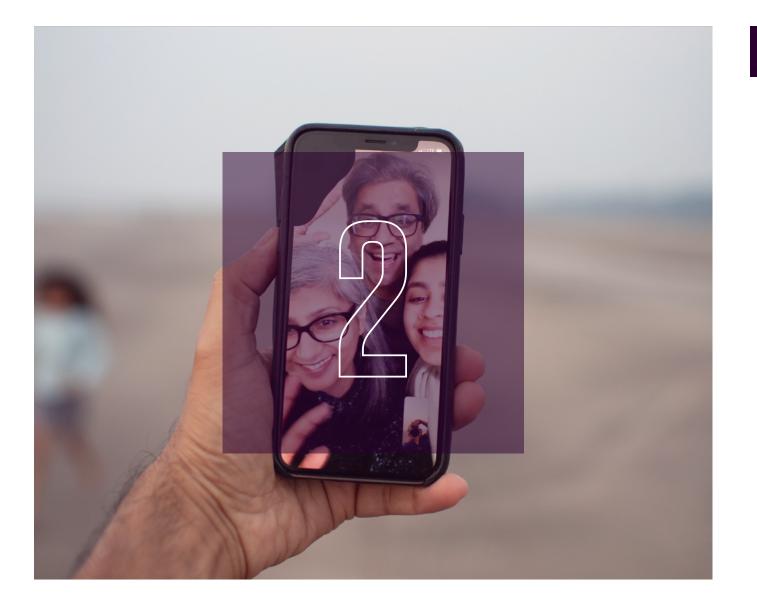
Using a mix of data from digital devices such as PCs and laptops, as well as viewing data from connected TVs and location data from mobile devices, we compared user activities over the course of the last year to identify how their behavior changed. By comparing these online behaviors with insights from a survey of global consumers we conducted with Sapio Research, we identified key changes in consumer considerations caused by a year of lockdowns, and the trends marketers must consider while making their marketing plans in 2021 and beyond.

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## The big trends

Lockdown has accelerated the rise of new channels	11
Digital content consumption grew and grew	12
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Online shopping has grown - and will stick around	17

Younger peo	ople are keen to travel, older	20
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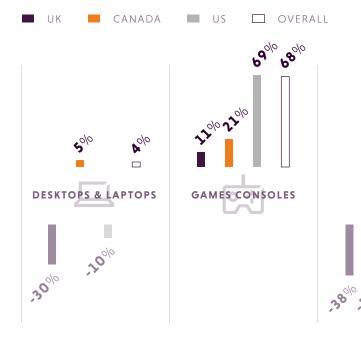
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### LOCKDOWN HAS ACCELERATED THE RISE OF NEW CHANNELS

It's not surprising that being at home a lot more has led to a lot more time spent in front of screens. But what's more notable is that the biggest and quickest rises in screen viewing have been on new and emerging devices and channels.

The online opportunity across traditionally addressable platforms either remained constant or even reduced over the lockdown year. Desktop activity remained fairly steady, for instance, while activity on mobile devices declined significantly. But emerging channels like connected TV and gaming consoles have seen massive gains. The online opportunity across connected TV and gaming consoles has seen growth of 200% and 70% respectively over the year, with most significant gains in the US.

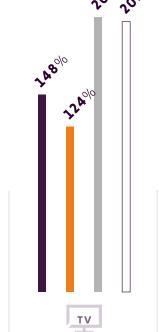
# CHANGE IN ADVERTISING OPPORTUNITY NOW COMPARED TO THE INITIAL LOCKDOWNS



**ONLINE OPPORTUNITY** Available impression opportunities

n 20<sup>6%</sup>20<sup>3%</sup>

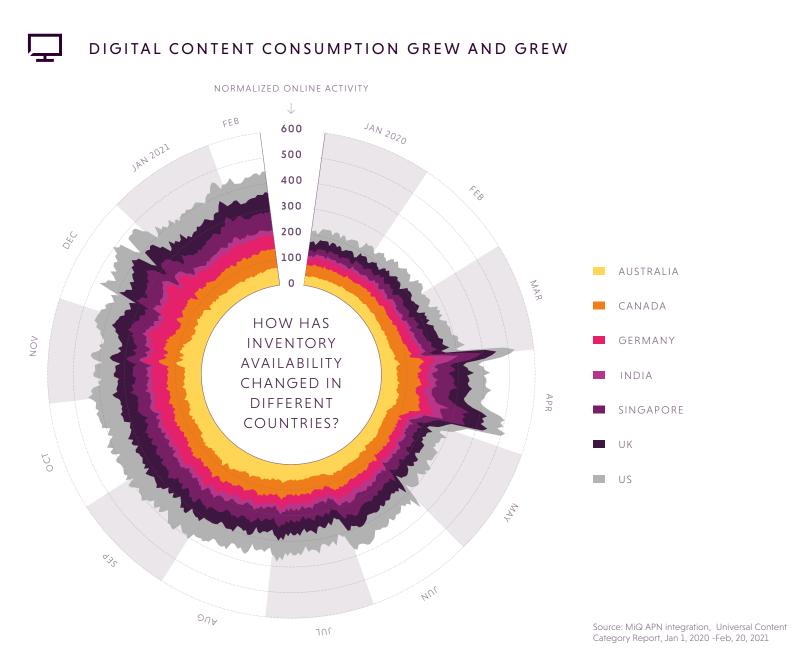
TABLET





Source: MiQ APN platform inventory report, lockdown 1.0 (March 15 -May 1, 2020) Vs Now (Jan -Feb 2021)

#### WHAT CONTENT HAVE PEOPLE BEEN LOOKING FOR IN LOCKDOWN?



In the early stages of lockdown, online activity surged across most domains all around the world. Though this leveled off as people adapted to life in lockdown, categories like online games, arts and entertainment, and news, have continued

to grow throughout the year, as people have found alternatives to keep themselves entertained and informed from their homes.

#### **WHAT DOES THIS SHOW?** Online activity doubled during

Online activity doubled during Lockdown 1.0 and while a majority of this activity leveled off, we continue witness a steady increase in user engagement online. PERCENTAGE CHANGE

	-	-	-	-	-	-	-
	AUSTRALIA	CANADA	GERMANY	INDIA	SINGAPORE	UK	US
ARTS AND ENTERTAINMENT	0%	<b>-18</b> %	<b>+41</b> %	-46%	<b>-12</b> %	+43%	+27%
CAR AND VEHICLES	-6%	<b>-1</b> %	<b>+96</b> %	<b>-7</b> %	+30%	+40%	<b>-1</b> %
BEAUTY AND PERSONAL CARE	<b>-9</b> %	<b>-27</b> %	+243%	+20%	+263%	+65%	<b>-14</b> %
BOOKS AND LITERATURE	<b>-44</b> %	<b>- 4</b> %	+64%	<b>- 8</b> %	+14%	<b>-45</b> %	<b>+2</b> %
BUSINESS AND INDUSTRY	<b>-10</b> %	<b>-13</b> %	<b>+73</b> %	<b>-44</b> %	+20%	<b>-21</b> %	<b>-4</b> %
COMPUTERS AND ELECTRONICS	<b>+11</b> %	<b>-15</b> %	+174%	<b>+98</b> %	+10%	+54%	+32%
EDUCATION	-33%	+20%	<b>-45</b> %	<b>+19</b> %	<b>-8</b> %	<b>+9</b> %	<b>+43</b> %
FINANCE	<b>+4</b> %	<b>-20</b> %	<b>+24</b> %	<b>-29</b> %	<b>-14</b> %	<b>+27</b> %	<b>-1</b> %
FOOD AND DRINK	<b>-13</b> %	<b>- 4</b> %	<b>+118</b> %	<b>-63</b> %	+25%	<b>-5</b> %	+3%
GAMES	+10%	+39%	<b>+29</b> %	<b>+229</b> %	+24%	<b>+4</b> %	+33%
HEALTH	<b>-16</b> %	<b>-37</b> %	<b>+96</b> %	<b>+2</b> %	<b>-26</b> %	<b>-22</b> %	<b>-21</b> %
HOME AND GARDEN	<b>-9</b> %	-24%	+73%	<b>+29</b> %	<b>-32</b> %	<b>-33</b> %	<b>-16</b> %
LIFESTYLE	<b>+12</b> %	+15%	+107%	<b>-26</b> %	<b>+7</b> %	<b>+28</b> %	+20%
NEWS	<b>-3</b> %	<b>-7</b> %	+50%	<b>-47</b> %	+13%	<b>+28</b> %	<b>+42</b> %
ONLINE COMMUNITIES	0%	<b>-1</b> %	<b>+59</b> %	<b>-5</b> %	<b>-24</b> %	<b>+17</b> %	+5%
PETS AND ANIMALS	<b>-22</b> %	<b>- 4</b> %	+ <b>219</b> %	+26%	<b>-21</b> %	<b>-18</b> %	+11%
SCIENCE	<b>-16</b> %	<b>-11</b> %	<b>+45</b> %	<b>-44</b> %	<b>-15</b> %	<b>-44</b> %	+15%
SHOPPING	+10%	<b>-2</b> %	+53%	+143%	<b>+4</b> %	<b>+7</b> %	<b>-37</b> %
SPORTS	<b>+8</b> %	<b>+79</b> %	+101%	<b>+16</b> %	+ <b>61</b> %	<b>+27</b> %	+55%
TRAVEL	<b>-21</b> %	<b>-9</b> %	<b>+42</b> %	<b>+16</b> %	+220%	<b>-24</b> %	<b>+77</b> %

Source: MiQ APN integration, Platform inventory report, lockdown 1.0 (March 15 -May 1, 2020) Vs Now (Jan -Feb 2021) Though the growth in inventory might seem like a marketing boon, the picture is actually mixed. The growth in online activity during the early stages of lockdown was tempered by a decline in viewability and a relative decline in user response to display ads.

Since then, viewability has improved and is now back to or above pre-pandemic level across every region. User responses on display ads are also showing a 3-4% lift compared to the initial

lockdown period, with categories like travel, auto and finance showing massive improvements in garnering user response.

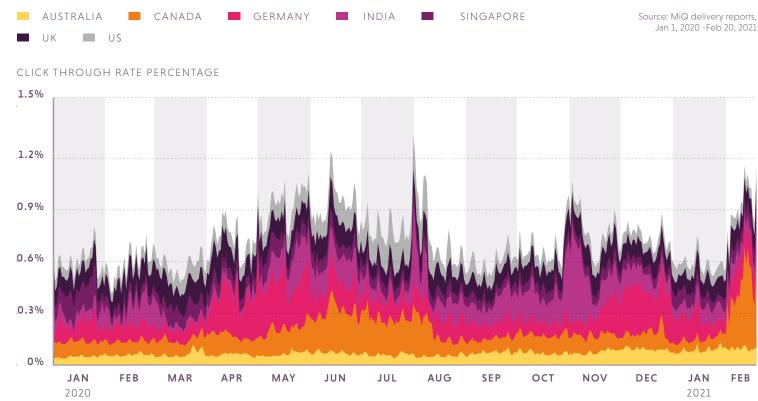
Video completions have also recovered from the initial slump in March-April 2020 and are up 3.8% year-on-year with consumer responses to video ads being more pronounced in the US, CA and the UK. In emerging markets, display continues to dominate in terms of user response. High Impact and interstitial media types have

been the most promising media types over the last 12 months offering the best returns for advertisers.

In short, it's taken a while for the increase in online activity to start paying dividends for marketers, but the data is starting to suggest that the year in lockdown has made consumers more receptive to online advertising, particularly in the more mature programmatic markets like the US, Canada and the UK.



#### HOW HAVE USERS BEEN RESPONDING TO ADS?



## NON-ESSENTIAL SPENDING TOOK A HIT

At the start of the lockdown, non-essential shopping took a severe hit. Travel saw the largest decline in spends followed by clothing and fashion. The cuts in spending were most pronounced in households with children.

Where non-essential shopping has happened, it's younger, more digitally savvy audiences doing it. People aged 18-34, for instance, were 1.3 times more likely to spend on consumer electronics,

with a majority of this spend happening online. This was also apparent in the holiday shopping audiences, where audiences in the same age group accounted for 48% of all holiday shopping across the US, Canada and UK.

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OF ALL HOLIDAY SHOPPING ACROSS THE US, CANADA AND UK WAS FROM THE **18-34** AGE GROUP



HOW HAS SPENDING CHANGED DURING THE YEAR OF LOCKDOWN?

## ONLINE SHOPPING HAS GROWN - AND WILL STICK AROUND

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Online shopping has seen a massive uptick during the year of lockdown across all age groups. And, even in areas where lockdowns have eased, interest in online shopping has remained high, suggesting a permanent shift in consumer behavior.

46% of consumers surveyed were positive about buying clothes and accessories online, even post lockdown, while 36% say the same about electronics and entertainment, and 33% about beauty products.

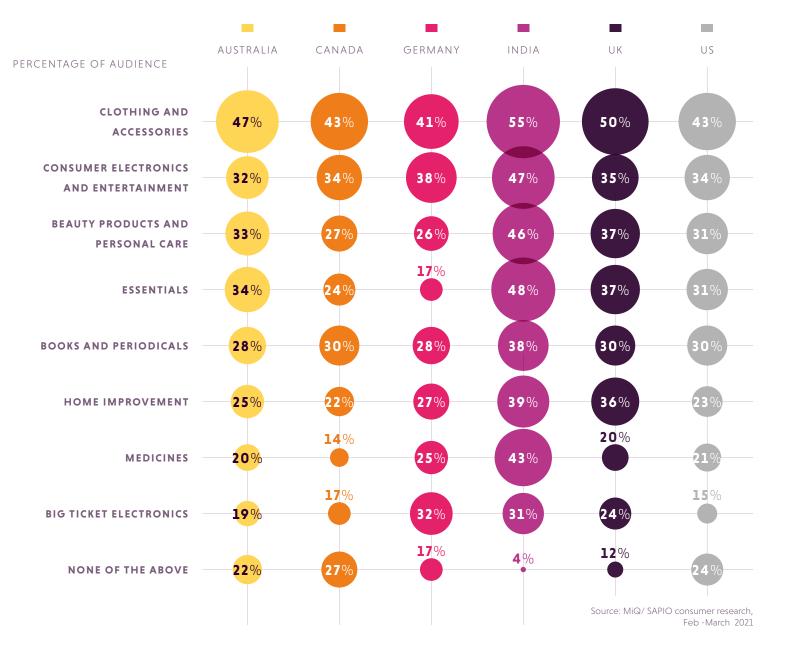


OF CONSUMERS SURVEYED WERE POSITIVE ABOUT BUYING CLOTHES AND ACCESSORIES ONLINE

Source: MiQ/ SAPIO consumer research, Feb - March 2021



WHAT HAVE PEOPLE BEEN BUYING ONLINE?



What's especially notable for marketers is the increased use of online shopping by older audiences. While older audiences are excited to go out and shop in the real world again, (64% of people over the age of 45 said they

were excited to do so), the traction gained among the older shoppers during the year lockdown means that they now have a competitive alternative to their usual brick and mortar outlets. Marketers need to be aware that even if

older consumers go back to making purchases in stores, they will still have a higher propensity for online research, price comparison and so on, creating new touchpoints for influencing this segment.

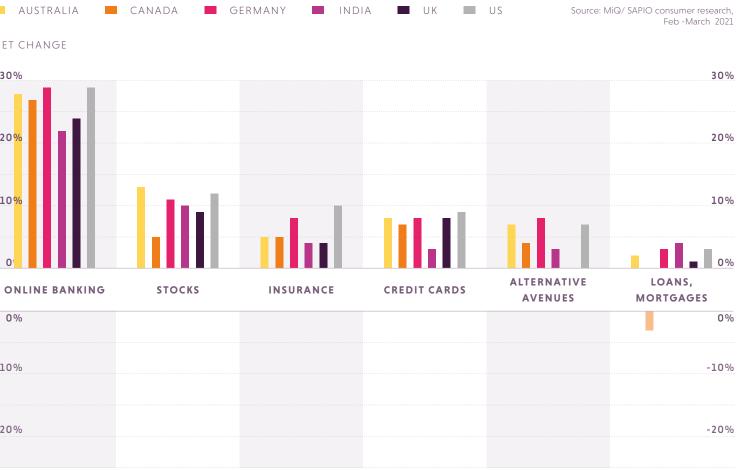
#### PEOPLE HAVE ALTERED THEIR FINANCIAL PRIORITIES $\square$

The pandemic has put large numbers of consumers around the world under significant financial stress. For many people, this has led to cutting down on unnecessary spending, as discussed above. But for those with personal savings, the lockdown year has been an opportunity to supplement their income through active investment in mutual funds, stock markets and even cryptocurrencies.

36% of customers have become more interested in online banking over the lockdown year, with higher

#### WHAT FINANCIAL PRODUCTS HAVE PEOPLE TURNED TO?





interest among people 45 and older. 26% of people have more interest in stock investments, while 23% say the same about cryptocurrencies. Younger, unmarried individuals have shown a higher propensity for taking higher risks for higher potential profits.



#### YOUNGER PEOPLE ARE KEEN TO TRAVEL, OLDER PEOPLE **REMAIN ANXIOUS**

Over the last year, our ability to travel anywhere has been stymied. But looking ahead, there is some optimism that moving around is going to become a realistic possibility. 44% of people are planning to travel for a holiday in the year ahead - though half of these still think this travel will be within their own country.

younger and older people when it comes to travel. Over half of consumers aged 18-45 Interestingly, households with are excited about traveling

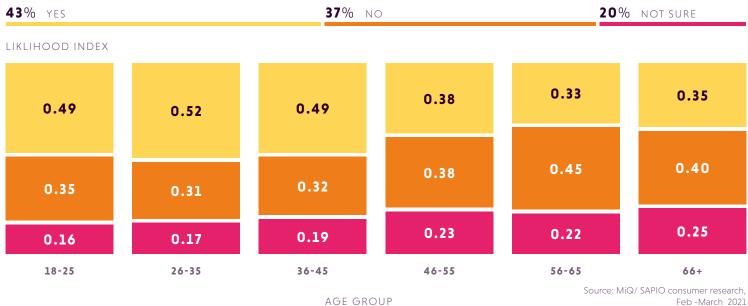
again once it becomes possible, whereas people over the age of 45 are still more tentative. Only a third of this audience have plans to travel when it's possible. This is also reflected in the modes of preferred transport. Younger people tend to prefer traveling by plane (56%), older people were a bit more hesitant to use public There's a stark divide between transport and prefered to use their own vehicle (65%).

children are the most eager

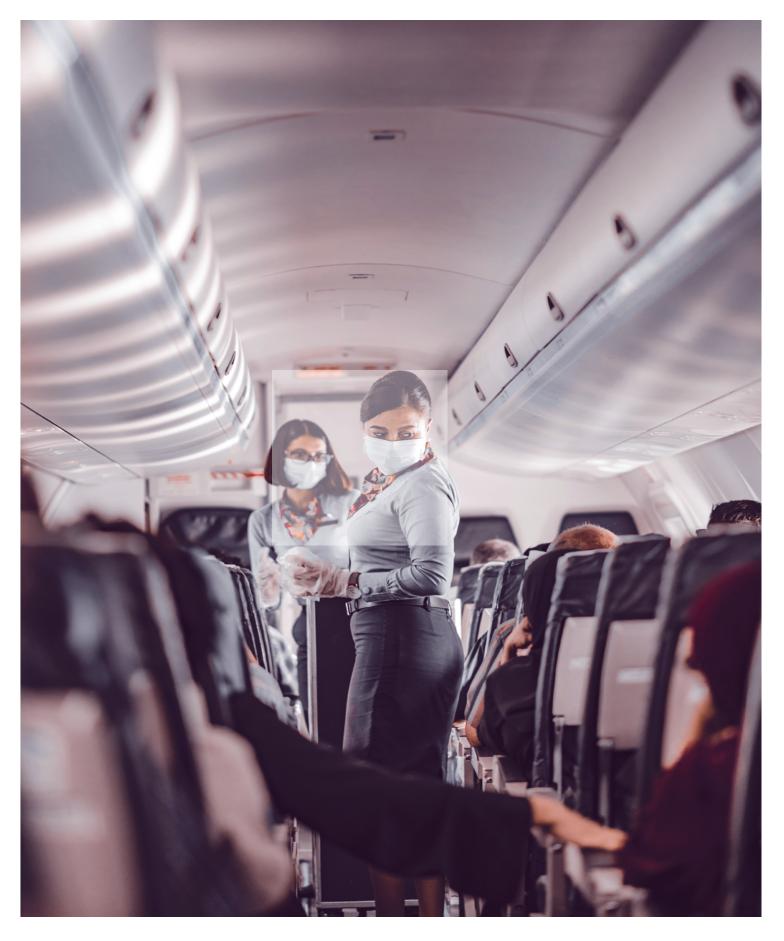
future travelers, with 60% of them looking to travel when they have a chance.

Travel is also an area where there are significant regional differences. While 69% Indian consumers plan to travel in the next 12 months, only 28% Canadian consumers say the same. American audiences, meanwhile, were most likely to go on a road trip.

#### WHICH CONSUMER AGE GROUPS PLAN TO TRAVEL FOR VACATION IN THE NEXT 12 MONTHS?



Feb -March 2021





As people have adapted to a year of lockdowns, they've changed their behavior to find new ways of living and working, finding new means of keeping themselves educated and entertained. Though lockdown will end (hopefully soon), it's likely that many of these new habits and behaviors will stick around.

These are the new audience groups created by a year of lockdowns that marketers need to be aware of going into 2021 and beyond.

## The audiences lockdown created

•	The self-improvers	24
	Parent-teacher-playmates	28
	Fitness fanatics	33

٠	Entertainment junkies	40
	Online shoppers	42

## THE SELF-IMPROVERS

#### WHAT KIND OF PEOPLE HAVE TAKEN UP A NEW ACTIVITY?

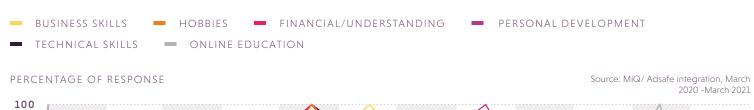


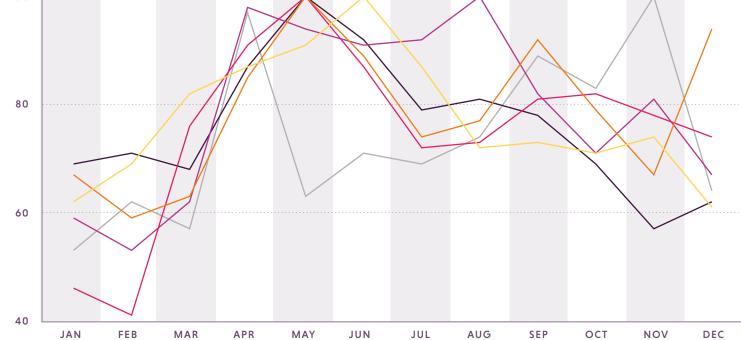
-	-	-			
LEARNED HOW TO COOK	ADOPTED A PET	LEARNED A NEW LANGUAGE	STARTED ONLINE DATING	BOUGHT A HOUSE	NONE OF THE ABOVE
32%	17%	16%	13%	10%	<b>27</b> %
30%	14%	13%	10%	<b>6</b> %	31%
33%	17%	14%	11%	10%	25%
23%	14%	13%	10%	7%	27%
18%	12%	<b>6</b> %	<b>6</b> %	<b>6</b> %	46%
21%	<b>9</b> %	<b>8</b> %	<b>8</b> %	5%	<b>42</b> %
38%	12%	<b>19</b> %	10%	5%	<b>18</b> %
8%	<b>6</b> %	<b>2</b> %	<b>2</b> %	2%	69%
14%	12%	3%	5%	<b>3</b> %	58%

Source: MiQ/ SAPIO consumer research, Feb -March 2021



#### WHAT ARE SELF-LEARNERS INTERESTED IN?



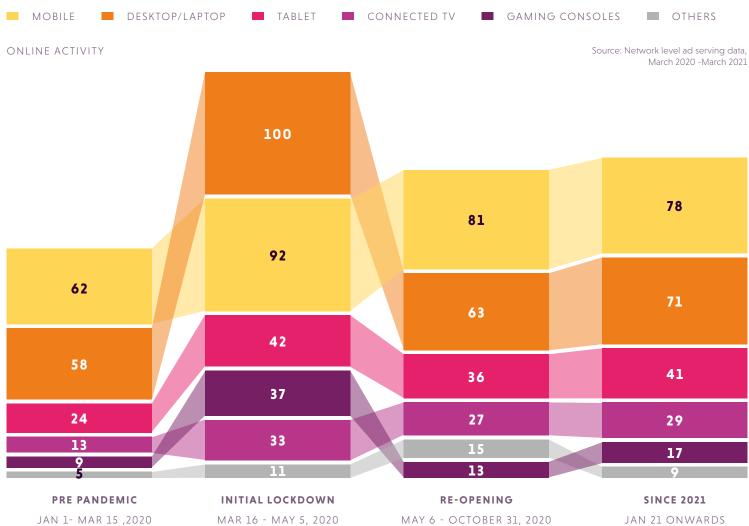


Educational and factual content continues to be a key browsing category for selflearners, this audience has developed alternate online interests as well. Sports and entertainment categories are a popular choice of content among APAC self-learners, while news seems to be a popular complementary category among people in

the UK and US. Canadian self-learners are anticipating exploring new cultures. People exploring new languages and cultures, in particular, are good indicate that individuals will soon be looking to travel.

The times people look for educational content have changed considerably

#### WHERE DO SELF-LEARNERS GET THEIR CONTENT?



	because of lockdown, with
g	weekend learning becoming
	the new norm. Mobile
	continues to be a dominant
	platform for audiences to pick
ors	up new skills in the US and
è	Canada accounting for 60%
	of educational and factual
	searches. Desktop is the
	popular medium for self-
	learners in Europe and
	APAC (68%).

March 2020 - March 2021

81	78
63	71
36	41
27	29
15	17
13	9

#### PARENT-TEACHER-PLAYMATES

The year in lockdown impacted everyone, but perhaps no one as much as families with children. The closure of schools and daycare mean that parents have been balancing the challenges of maintaining their jobs while also caring for and entertaining their children ago, though the average on a full-time basis.

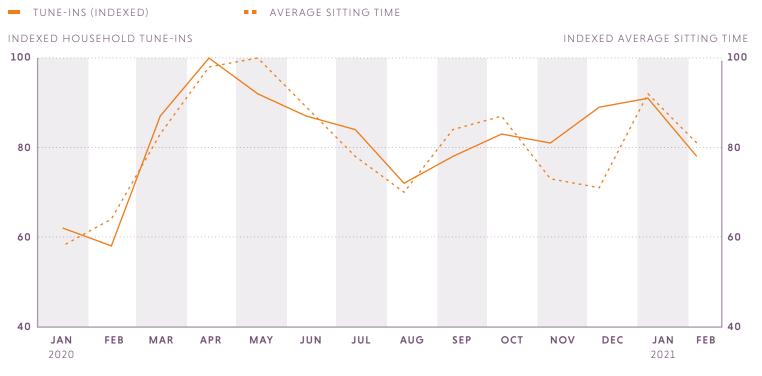
In these households, there

viewing and gaming console

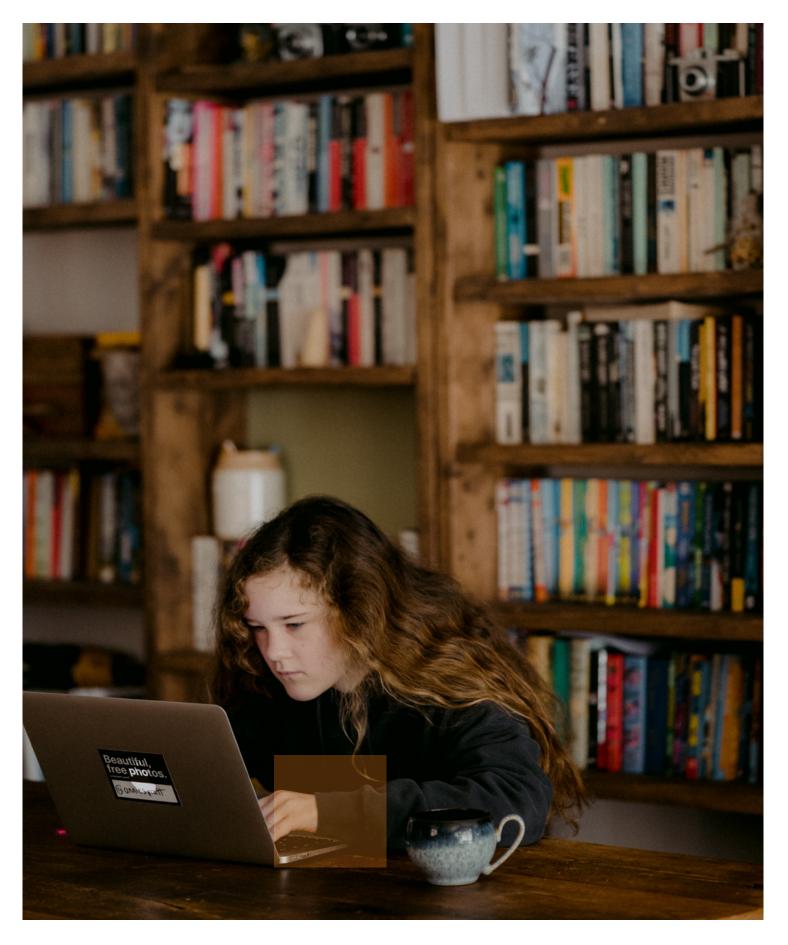
was an initial surge in TV

usage which has since normalized, indicating that the parents have found a balance between entertainment and education. The consumption of kids entertainment and factual content on linear and OTT TVs remains 13% higher today compared to a year viewing time across these categories has also gone down by 98 minutes per month compared to the peak in April-May 2020.

#### HOW MUCH TV HAVE CHILDREN BEEN WATCHING?



Source: MiQ Advanced TV, Jan 2020- Feb 2021



OTT viewing continues to remain strong among these parent-teacher-playmate households with a 14% increase in viewing time across the OTT platforms compared to a year ago. This growth has been most pronounced in households

with children under the age of eight, up 28% YOY.

Online demand for information sources around current affairs, general knowledge and factual content has also grown considerably over the

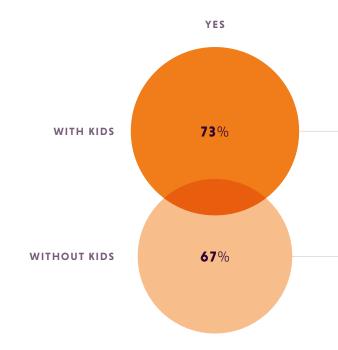
past year in these family households, especially in Canada and the UK. Meanwhile, US households have tended towards health and fitness content, while Indian parents have been more drawn to news and sports content.

During the initial shock of lockdown, working parents were far less likely to visit business domains, but as they have adapted viewing has returned to prepandemic levels.

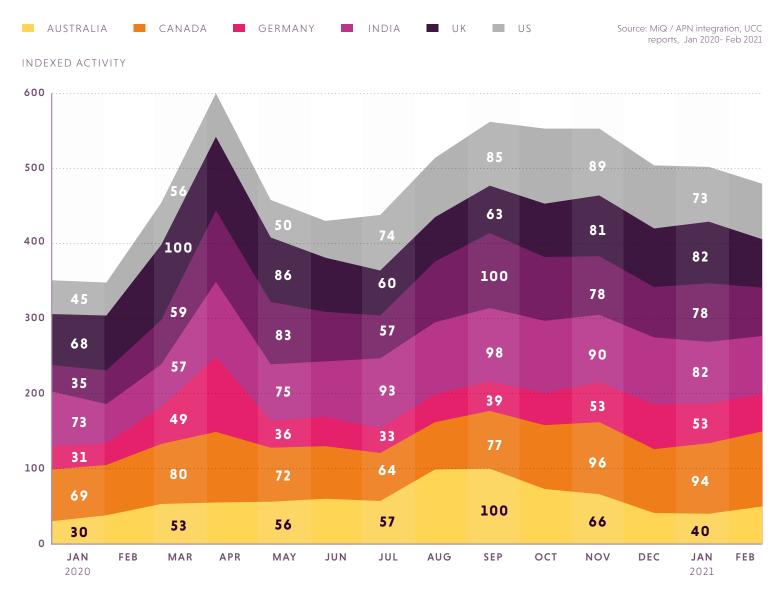
Among all our segments, it's these parent-teacherplaymates who are most eager for things to get back to normal. Whether it's going out for dinner at their favorite restaurant or traveling for a holiday, parents across the

#### DO YOU PLAN TO GET VACCINATED FOR COVID-19 WHEN IT BECOMES AVAILABLE AND YOU ARE ELIGIBLE?

PERCENTAGE OF RESPONSE

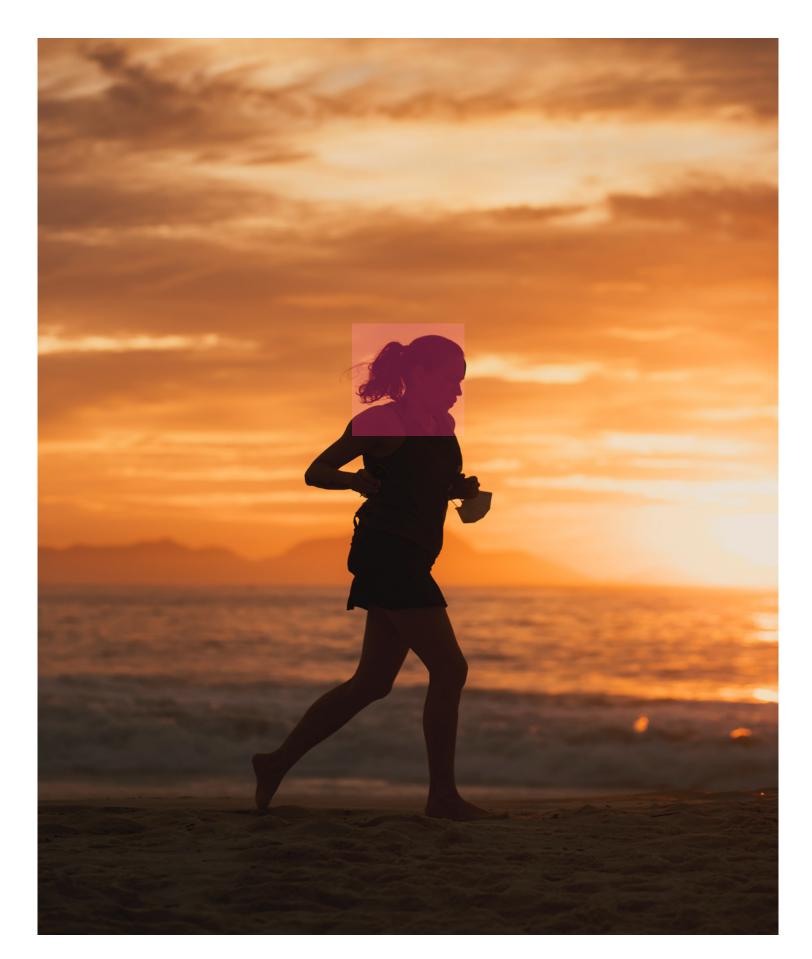


#### HOW MUCH ONLINE EDUCATIONAL CONTENT HAVE PEOPLE CONSUMED?



globe are showing signs of fatigue in their multitasking roles. Hence it doesn't come as a surprise that confidence in vaccines is highest among young parents, 73% of whom plan to take the jab compared to 67% among non-parents.





#### FITNESS FANATICS

Lots of people have used the year in lockdown to get in shape. Primarily composed of students and professionals between 25 and 44 years of age (and skewing male), fitness fanatics have been extremely active on health and fitness sites and showed

a heavy interest in lifestyle content.

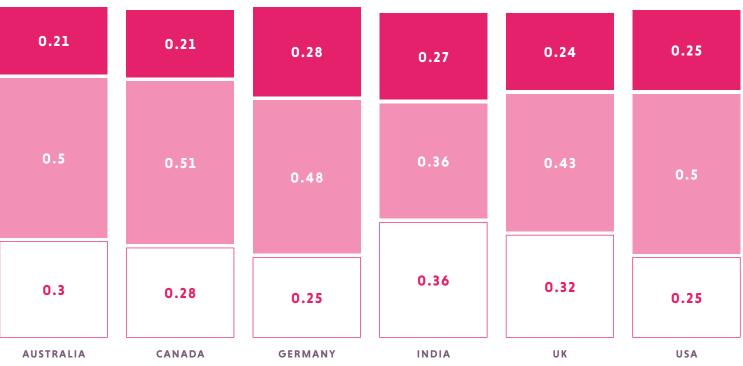
Nearly a third of Indianwere moreand UK consumers in ouroutside, asurvey have spent more timegrew as theworking out at home this year,went on.while the US audiences werethe least active among all

# HOW MUCH TIME DID PEOPLE SPEND EXERCISING AT HOME COMPARED TO PRE-LOCKDOWN?

 PERCENTAGE OF RESPONSE
 Source: MiQ/ SAPIO consumer research, Feb - March 2021

 24% SPENT LESS TIME
 46% ABOUT THE SAME TIME





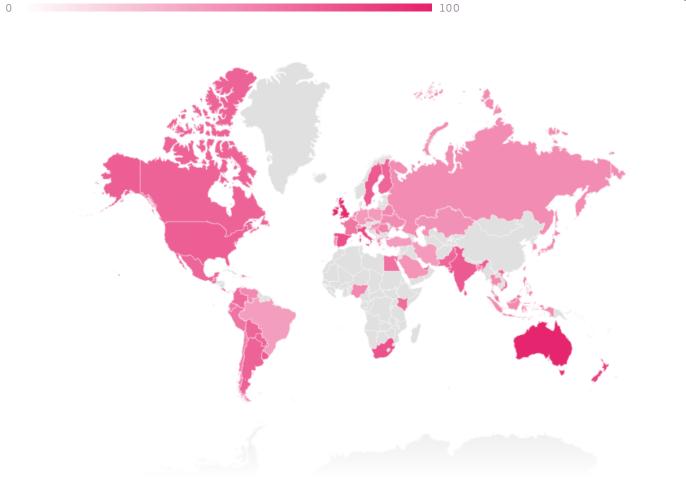
audiences polled with only a quarter working out at home. Younger audiences (18-35) were more likely to exercise outside, a tendency which grew as the lockdown year r, went on.

REGION

#### INTEREST IN MEMBERSHIP FOR GYMS AND FITNESS CENTERS SINCE THE REOPENING OF LOCKDOWNS

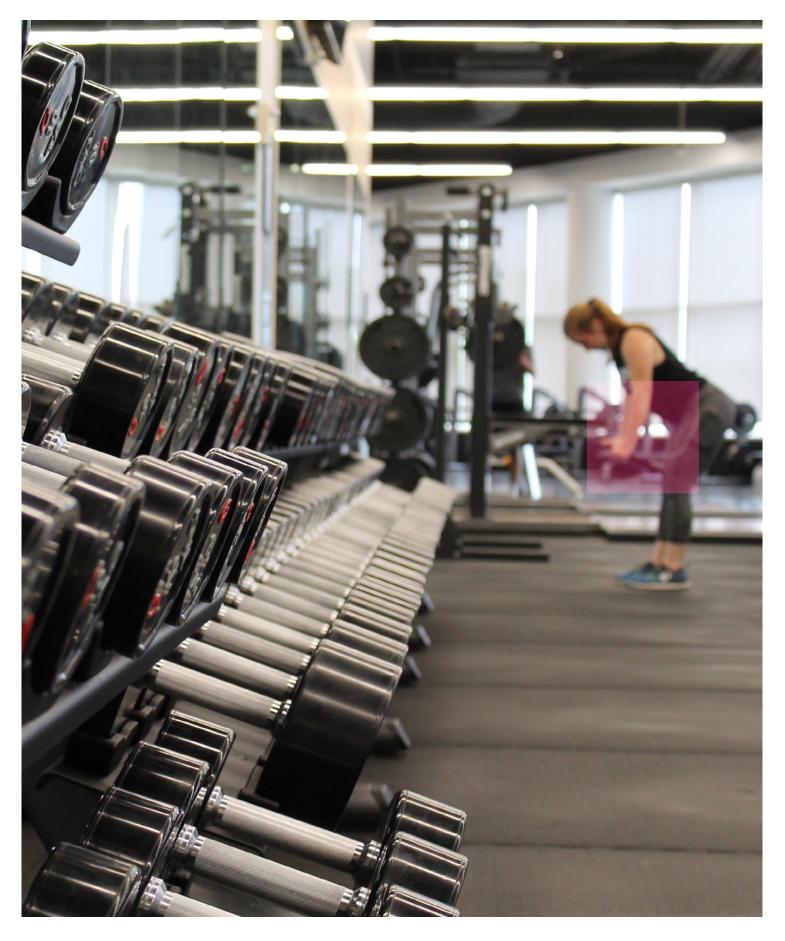
NORMALIZED SEARCH INTEREST

Source: MiQ / Adsafe integration, March 2020 -Feb 2021

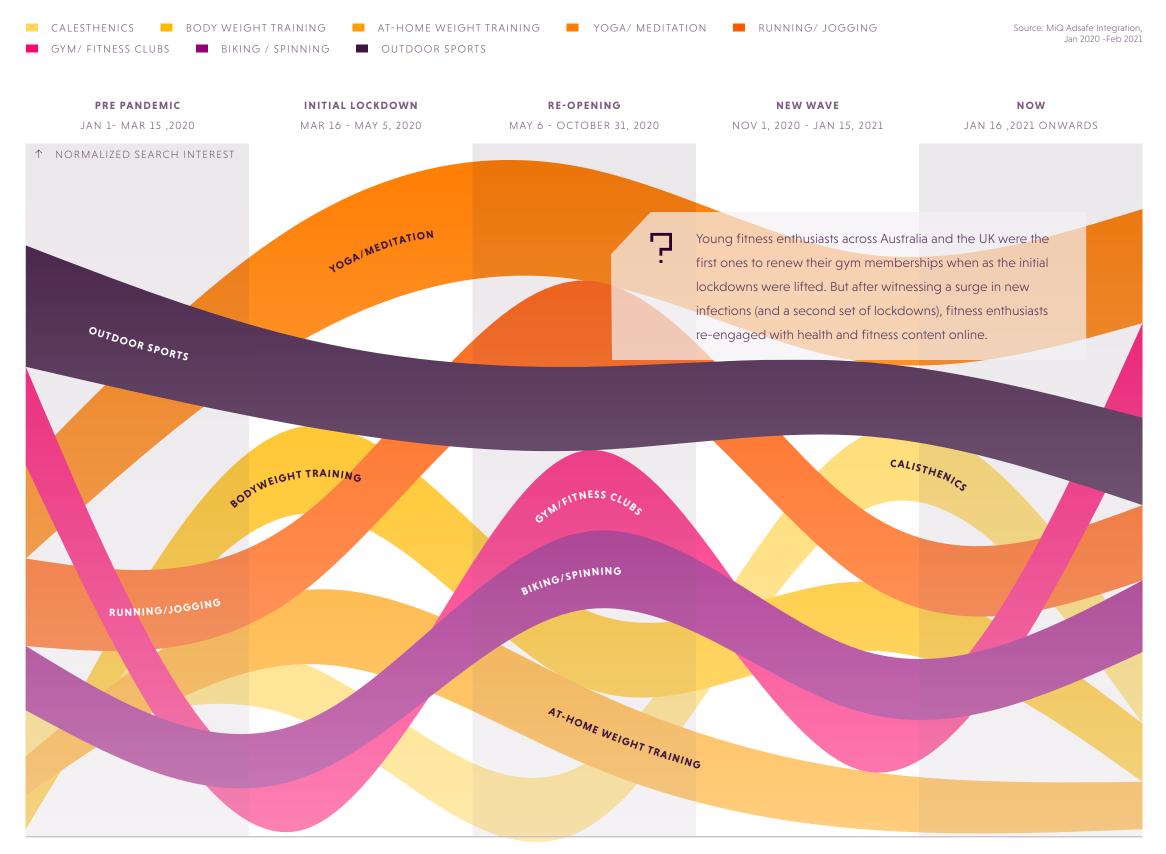


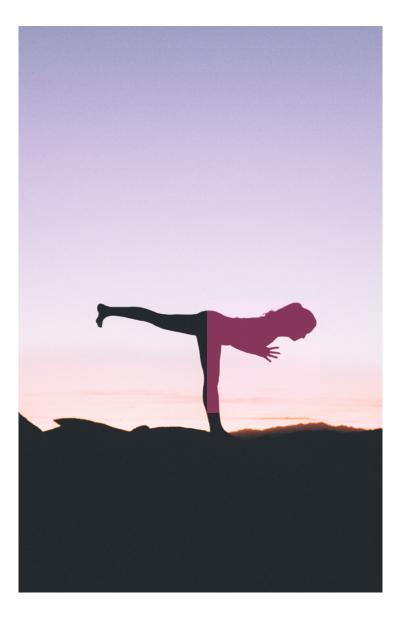
Where gyms and health clubs reopened during the year (even if the opening was temporary or limited in capacity), young fitness enthusiasts across Australia and the UK were the first ones to renew their gym memberships. But the later waves of the virus and new

mutations have impacted interest in gyms and health clubs adversely: in the US and Canada, people are still considerably apprehensive about working out at the gym but are getting increasingly more comfortable with going outside for a jog or bike ride.



#### WHAT KINDS OF FITNESS HAVE PEOPLE TRIED OUT?





The fitness first audience looks set to keep up its healthy habits post-lockdown. A quarter have looked at home cooking and meal prep as a way to stay healthy, while three in five have researched and engaged with fitness content at least once per

month online. While yoga and meditation were popular in the US and India, calisthenics and bodyweight exercises gained popularity in Germany and in Australia.

#### HOW MUCH EFFORT HAVE PEOPLE BEEN PUTTING INTO THEIR WELL-BEING SINCE THE START OF THE PANDEMIC

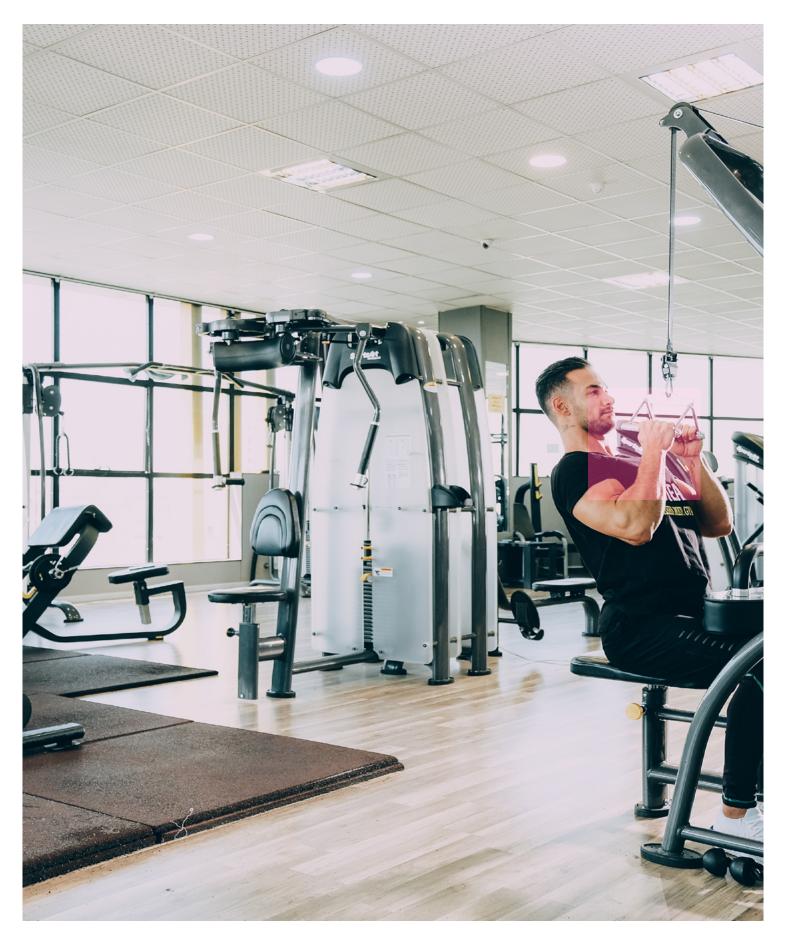
PERCENTAGE OF RESPONSE ACROSS ALL REGIONS



Mental and emotional wellness sites also ranked highly among the fitness first audience. 60% of people aged 26-45 put effort into maintaining their physical, emotional and mental wellness. Indian audiences were most conscious of maintaining their health, while the Canadian and American audiences were least conscious among the global audiences polled.



OF PEOPLE AGED 26-45 PUT MORE EFFORT INTO MAINTAINING PHYSICAL, EMOTIONAL AND MENTAL WELLNESS Source: MiQ/ SAPIO consumer research, Feb -March 2021

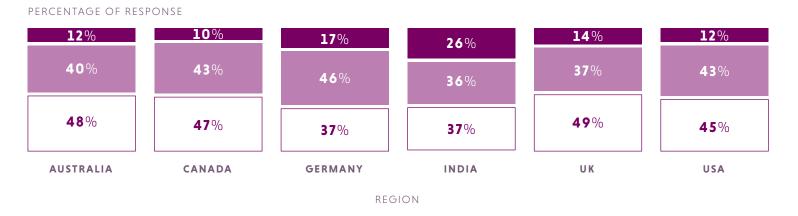


#### ENTERTAINMENT JUNKIES

While a lot of people around the world used the year in lockdown to improve themselves and develop new skills or re-connect with some old hobbies, there was a large segment who spent a majority of their time in front of their television screens or on their laptops watching TV shows and movies. 50% of households in the UK and Australia spent more time in front of their TVs. However the uptick for entertainment content in India and Germany, though still significant, was considerably lower.

#### HOW MUCH HAVE PEOPLE IN DIFFERENT COUNTRIES BEEN WATCHING TV?

- I SPEND LESS TIME DOING THIS THAN A YEAR AGO
- □ I SPEND **MORE** TIME DOING THIS THAN A YEAR AGO



ABOUT THE SAME

But TV was not the only entertainment platform audiences flocked to. We also saw a considerable increase in activity across gaming consoles and online gaming platforms. US and UK audiences saw close to a 300% increase in gaming activity across consoles and on online gaming forums during the initial lockdown period between April-May 2020. Though those numbers have since normalized, they continue to be higher than the year before.

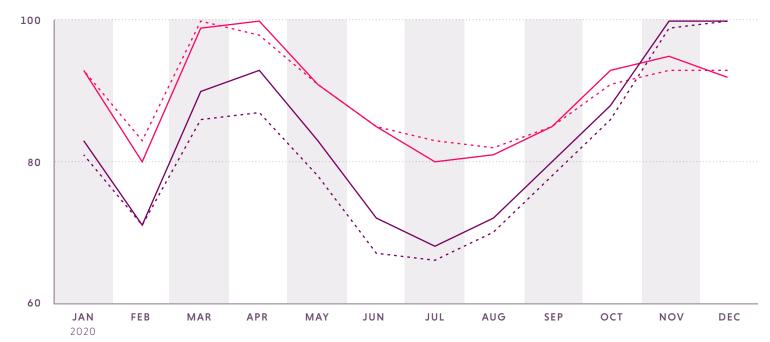
Likewise, the consumption of entertainment and gaming content online and on TV continues to be higher compared to pre-lockdown levels. Content consumption on OTT platforms has grown 19% among people aged 18-34, the traditional OTT loyalists. But it's grown even more strongly among people aged 35 and older (21%), many of whom are likely to be new to OTT. It's a safe bet that this new enlarged audience means marketers will need to rethink their profiles for OTT targeting in the future.



# HOW HAS LINEAR AND OTT CONTENT CONSUMPTION CHANGED OVER THE LAST YEAR?

- OTT PLATFORM ACTIVE HOUSEHOLDS
   OTT PLATFORM TOTAL VIEWING TIME
- **TRADITIONAL PLATFORM** ACTIVE HOUSEHOLDS

#### NORMALIZED INDEX



Source: MiQ/ SAPIO consumer research,

Feb -March 2021

## PLATFORM - TOTAL VIEWING TIME TRADITIONAL PLATFORM - TOTAL VIEWING TIME

Source: MiQ Advanced TV, Jan - Dec 2020

AUSTRALIA

CANADA

#### WHAT ITEMS ARE YOU MORE LIKELY TO BUY ONLINE IN A POST-PANDEMIC WORLD?



REGION

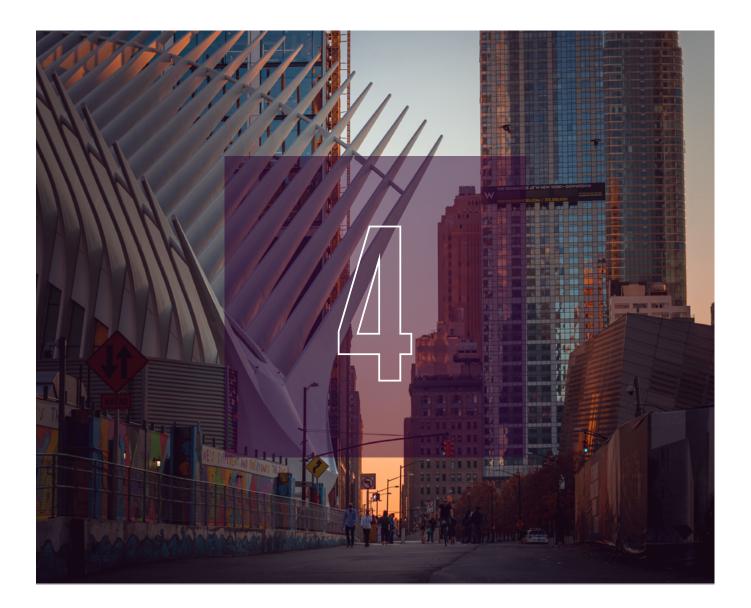
INDIA

UK

GERMANY

42

USA



## Looking ahead

Looking ahead

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About MiQ

In this study, we've looked at how the year in lockdown has changed consumers and which of those changes are likely to last once lockdowns are a thing of the past. With vaccines being rolled out around the world, we can all hope that a return to normal is coming soon.

But it's also an unfortunate fact that COVID isn't over ye There's still a lot of uncertain about what the future looks like and how quickly things like in-store shopping, trave and outdoor entertainment will return.

For advertisers, that means like in-store shopping, travel there are more ways to learn and outdoor entertainment about and reach your digital will return. audience than ever. And this represents an enormous One thing we can be fairly opportunity - and a challenge. certain about, however, is As the number of addressable that the year in lockdown has channels increases, and accelerated a lot of trends the number of signals you that were already in progress, receive from those channels

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	especially with regards to
et.	online retail, entertainment,
nty	and education.

likewise grows, reaching your audience at the right time, in the right place and with the right message becomes a tougher proposition.

But all the data to get it right is available to you. And, with the right programmatic partners and data specialists to assist you, reaching the new postlockdown consumer can be more efficient and effective than the pre-lockdown world.

#### ABOUT MIQ

We're MiQ, a programmatic media partner for marketers and agencies. We connect data from multiple sources to do interesting, exciting, business-problem-solving things for our clients. We're experts in data science, analytics and programmatic trading, and we're always ready to react and solve challenges quickly, to make sure you're always spending your media investments on the right things in the right places.

Please visit us wearemiq.com

