

REPORT

2020 Rebound

Consumer Behavior, Sentiment,
and Trends

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At Criteo, we don't have a crystal ball, but we do have data.

What we've seen in our ongoing analysis of market trends is that once the coronavirus outbreak began dominating news headlines, consumers quickly responded by adopting new habits and product preferences to meet their changing needs. These behaviors give us insight into what, where, and why they'll buy in the coming months.

Brands have had to play catch-up. Some trends may be permanent and others may normalize in time. But, right now, we can estimate that the next year or two will require new strategies as marketers adapt to the new consumer. The lockdowns may be over, but the behaviors consumers have learned—and the ways they've purchased and adapted—will last for much longer.

Inside “The 2020 Rebound Report,” we'll break down what marketers need to know about how consumers are adapting this year, what they're buying, and which marketing strategies are proving to be most effective.

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A Tale of Two Consumers

The coronavirus pandemic created a new normal.

In this reality, people don't leave the house without a face covering, and they try to stay three meters away from strangers. As cities scale back formal distancing measures and businesses begin to reopen, we expect behaviors like these to continue. Significant numbers of consumers will be cautious for months to come, while others will start to resume their lifestyles with some modifications.



Going the Distance

People are ready to get out of confinement, but many are worried about asymptomatic cases and transmission. In the absence of mandated social distancing policies, careful consumers will choose to keep space between themselves and others.

A survey by Coresight found that:



of US consumers plan to avoid at least one type of public space after lockdowns end



plan to avoid shopping centers and malls specifically

Criteo's consumer sentiment survey, "Peak to Recovery," conducted in May, surveyed 10,000+ shoppers worldwide and found that in-store comfort levels vary¹:



of respondents in the US and the UK feel comfortable going to a shopping mall right away



of Australian respondents say they're already comfortable with going to shopping malls



45%
Australia



55%
United Kingdom



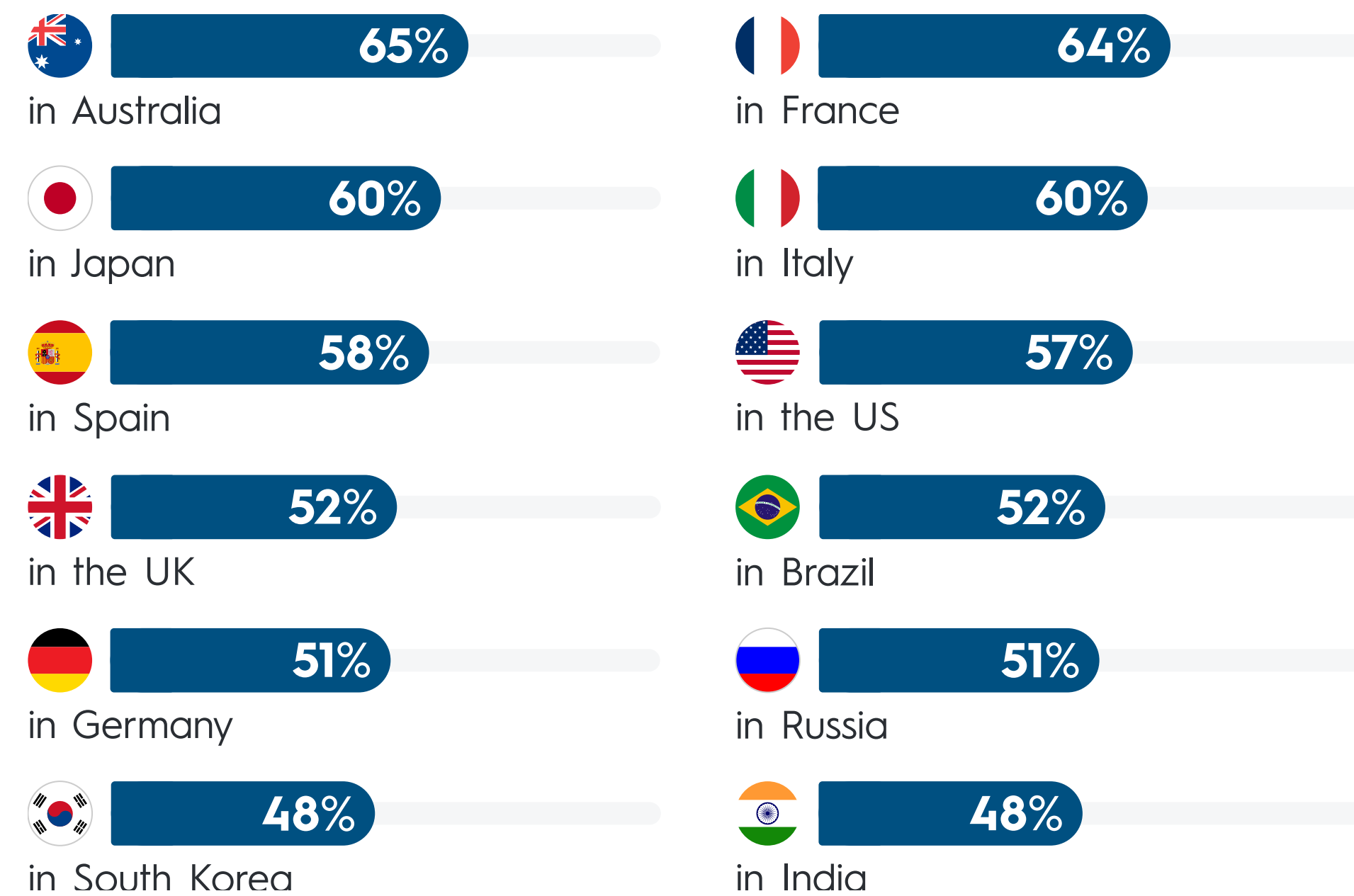
56%
United States

say they'll be at-ease with visiting shopping malls in one to five months

Crowds No More

Our research shows that as the prospect of crowded spaces increases, consumers' comfort levels decrease¹.

Respondents who say they'll feel comfortable going to restaurants in one to five months:

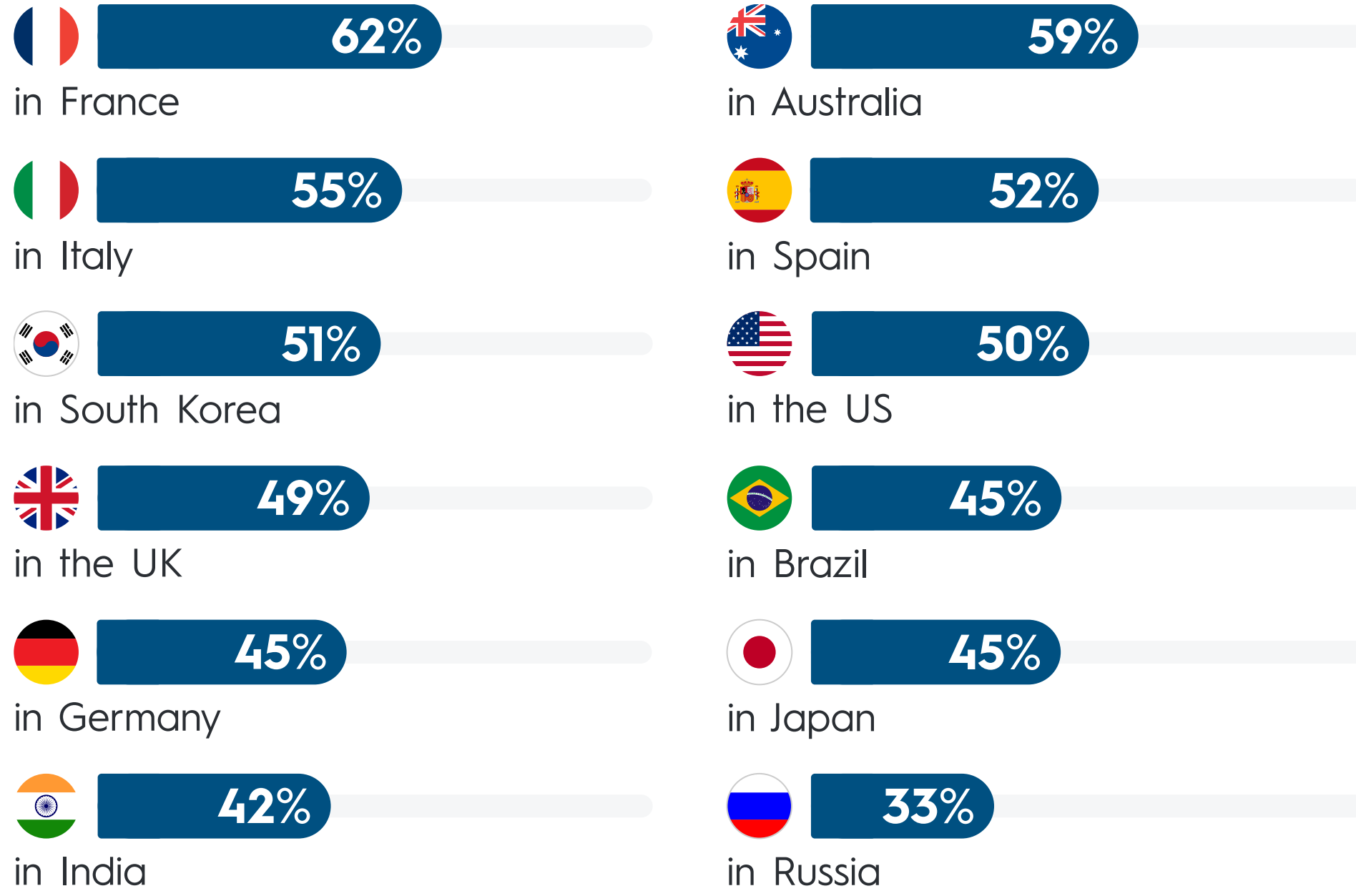


56%
Globally



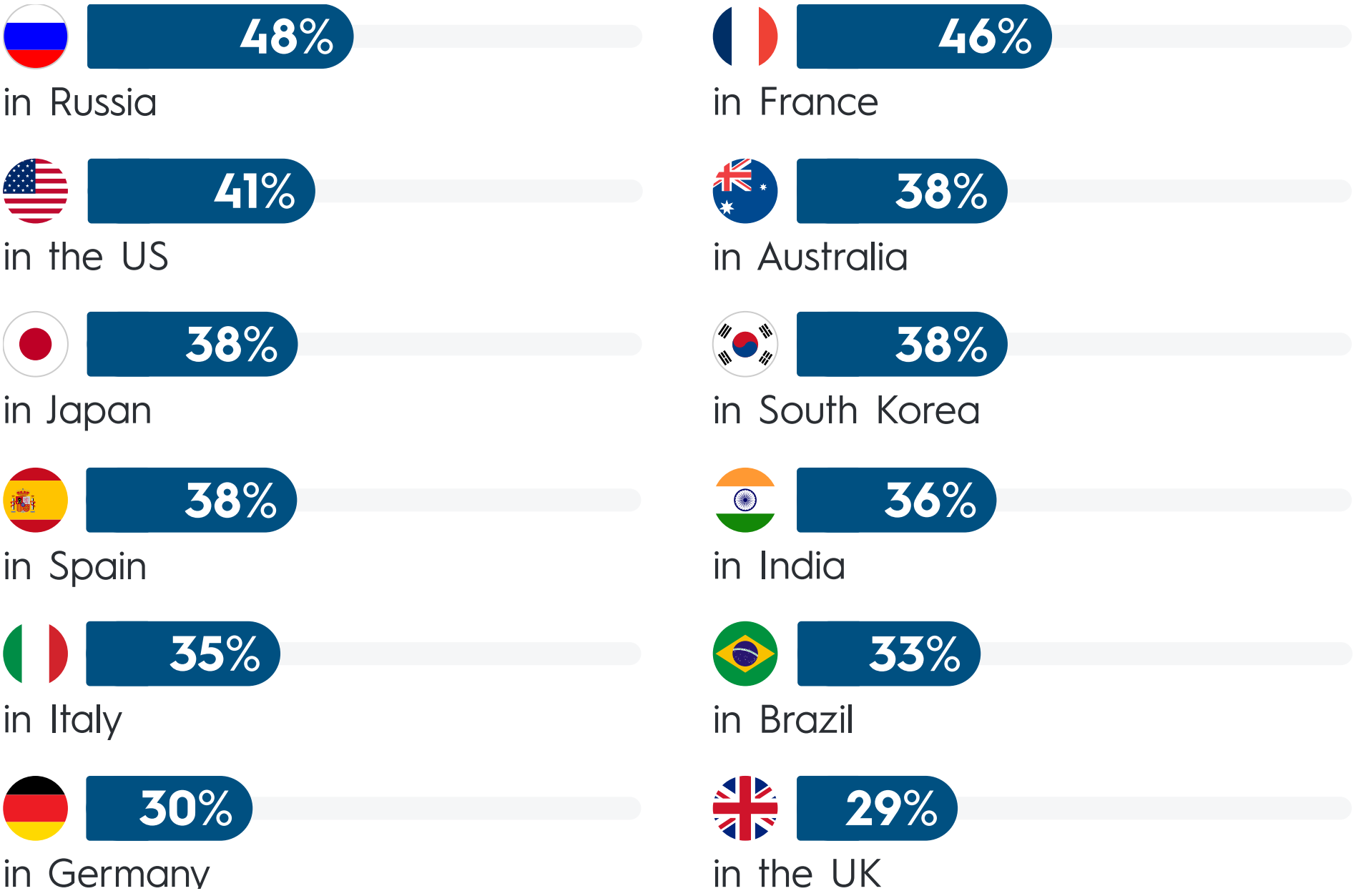
CROWDS NO MORE

Respondents who say they'll feel comfortable going to a bar in one to five months:



CROWDS NO MORE

Respondents who say they'll feel comfortable going to a large sports event or concert in one to five months:



38%
Globally



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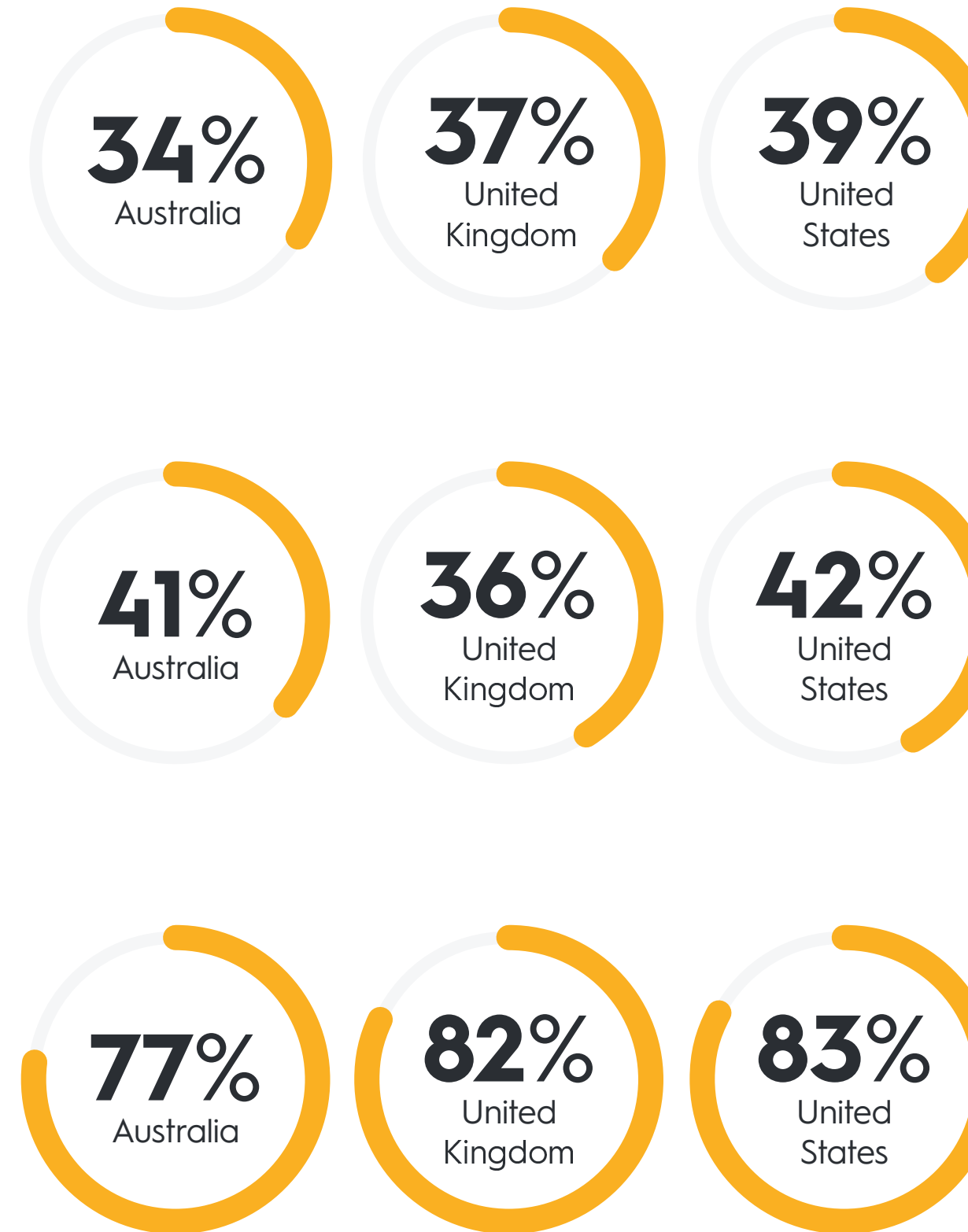
The Age of Discovery

During the height of lockdowns, internet traffic rose by up to 35%, according to data from Netscout.

Social distancing prompted more consumers than ever to turn to online channels to find what they needed. The vast majority say they plan to keep purchasing from the new stores they discovered.

For marketers, this could be an opportunity to connect with new audiences that are looking for your products and create loyal new customers.

Here's what our survey found¹:



of respondents shopped from some online stores for the first time

said they bought from the online versions of physical stores they usually purchase from

are likely to keep purchasing from the new stores they discovered

So what characteristics do shoppers have now? And what are they looking for?

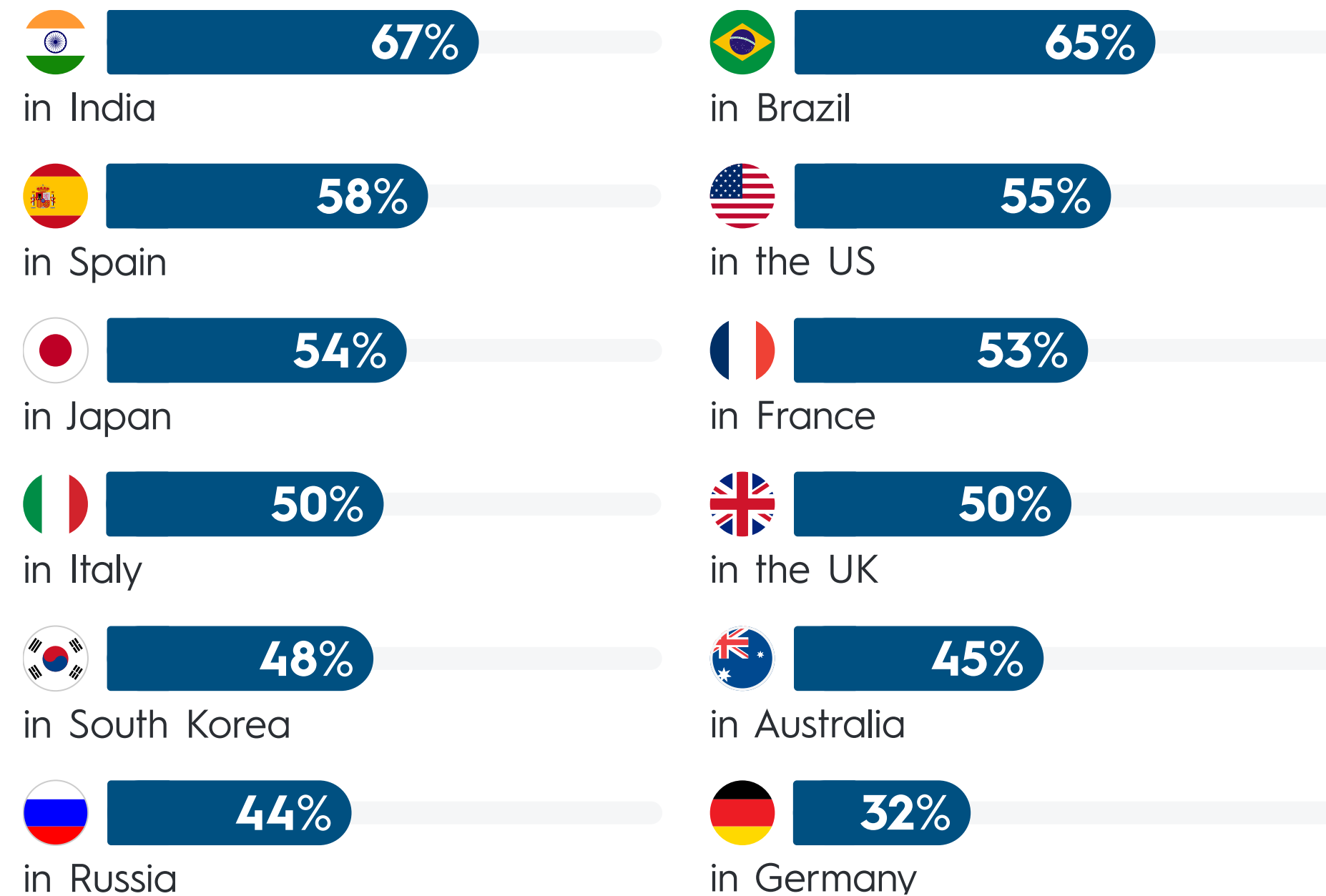
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Redesigned Lifestyles

Of the respondents in our “Peak to Recovery” study:



said that the peak crisis period was a **good opportunity to make changes** to their lifestyles and habits.

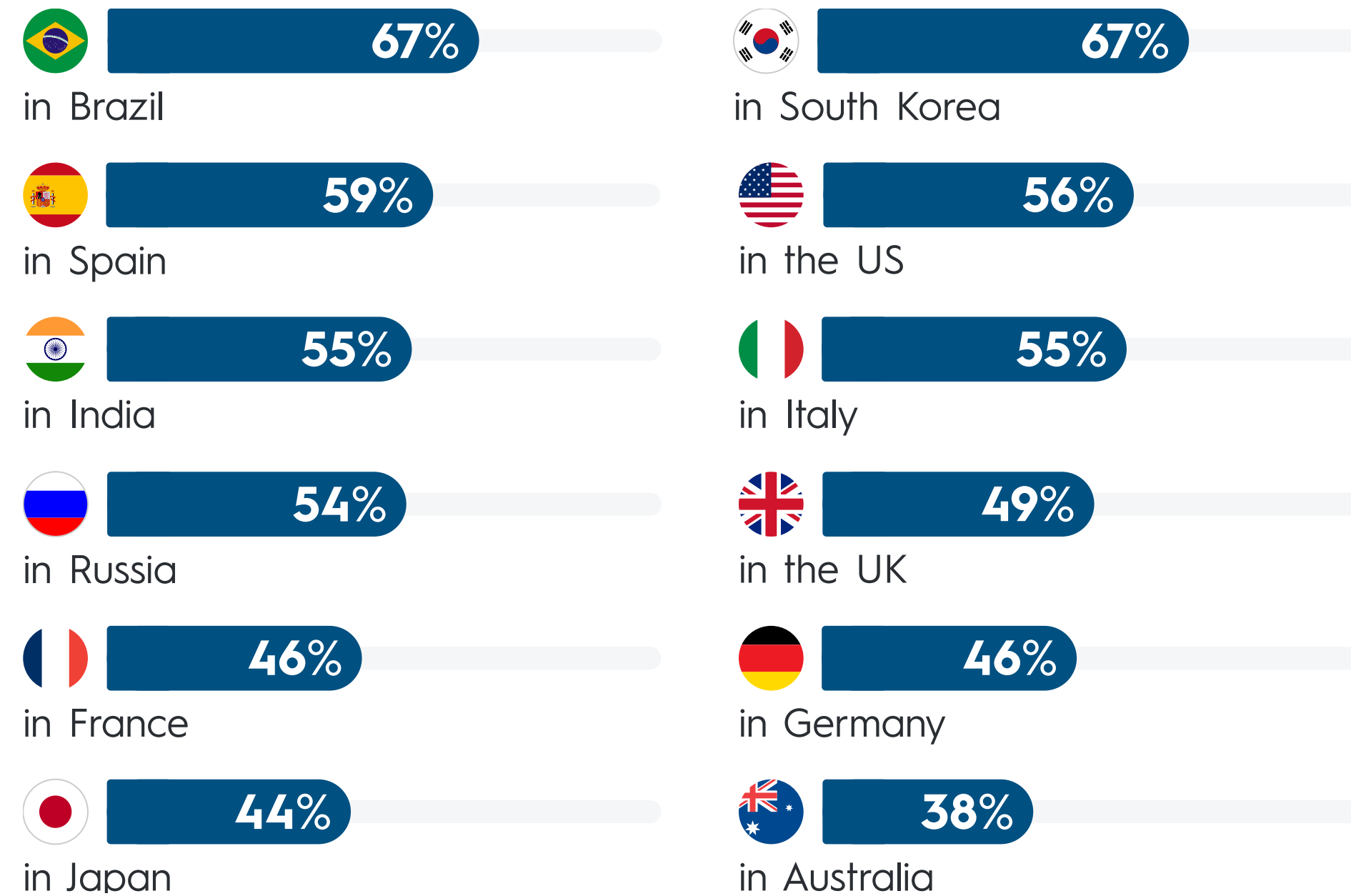


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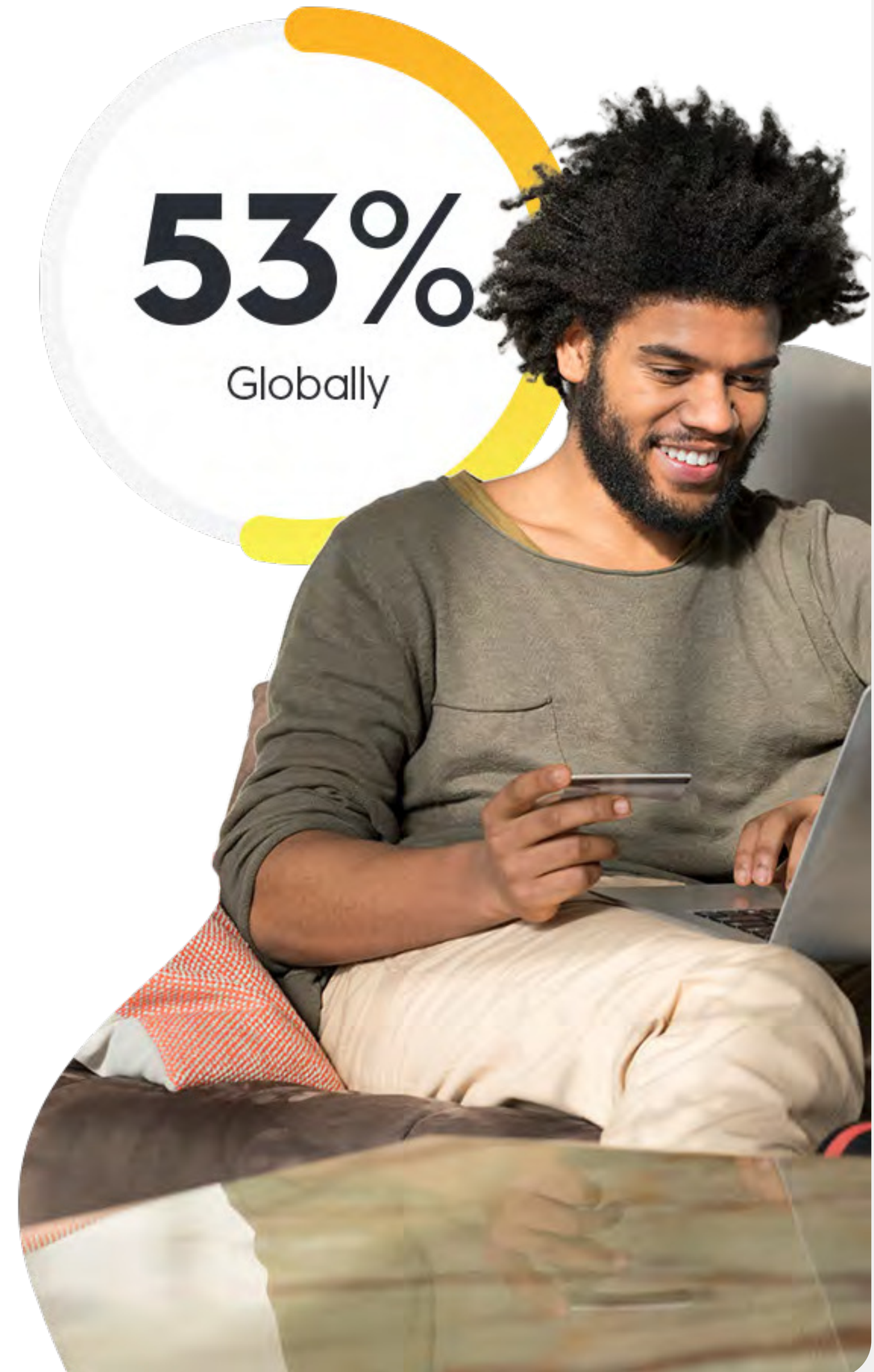
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In step with the widespread adaptations made to daily routines, the **rise of ecommerce** was also apparent in our survey:



discovered at least one form of online shopping—like purchasing products online or through smartphone apps, ordering items online and picking them up in stores, and ordering food for delivery—and they plan to continue.



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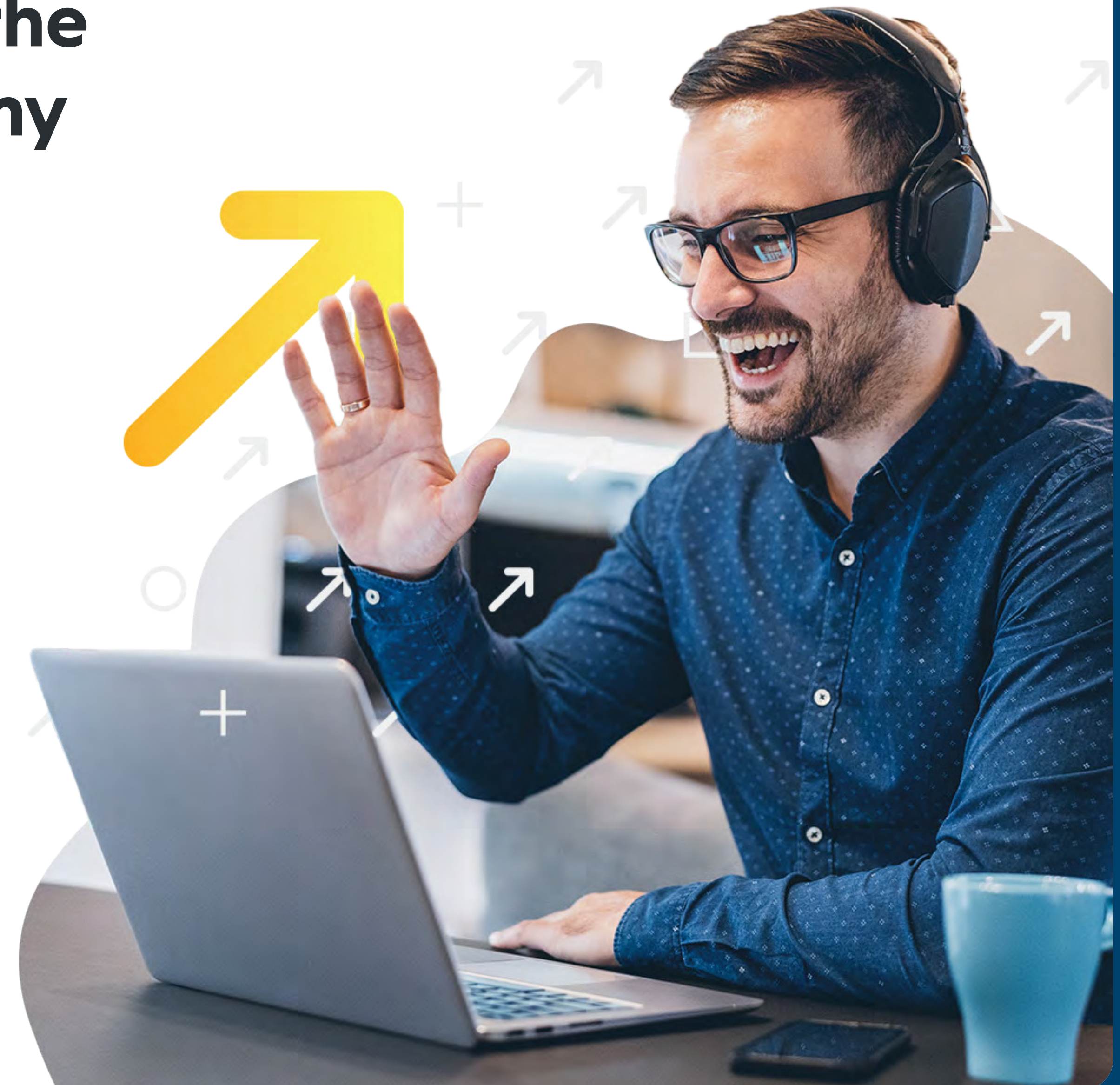
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5 Top Trends in the Rebound Economy

Based on our ongoing analysis of transaction-level data and consumer research, we've unpacked five major consumer behavior trends that have significant implications for marketers.

-  #1 Do-It-Yourself Mentality
-  #2 Remote Work
-  #3 Distance Learning
-  #4 Cooking at Home
-  #5 Home Exercise



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#1 Do-It-Yourself Mentality

Whether due to nostalgia for simpler times or a pull-yourself-up-by-your-bootstraps state of mind, Criteo data shows a self-sufficient attitude is permeating popular culture:

Knitting

We Are Knitters, a Spain-based online seller of knitting supplies, saw **sales spike globally 235%** since March, with New York **(+300%)** and Massachusetts **(+375%)** boasting the most yarn enthusiasts.

Our “Peak to Recovery” survey shows that a good chunk of consumers discovered (or re-discovered) do-it-yourself (DIY) activities in the last few months and intend to keep doing them¹:

 **20%**
Australia

 **24%**
UK

 **21%**
US



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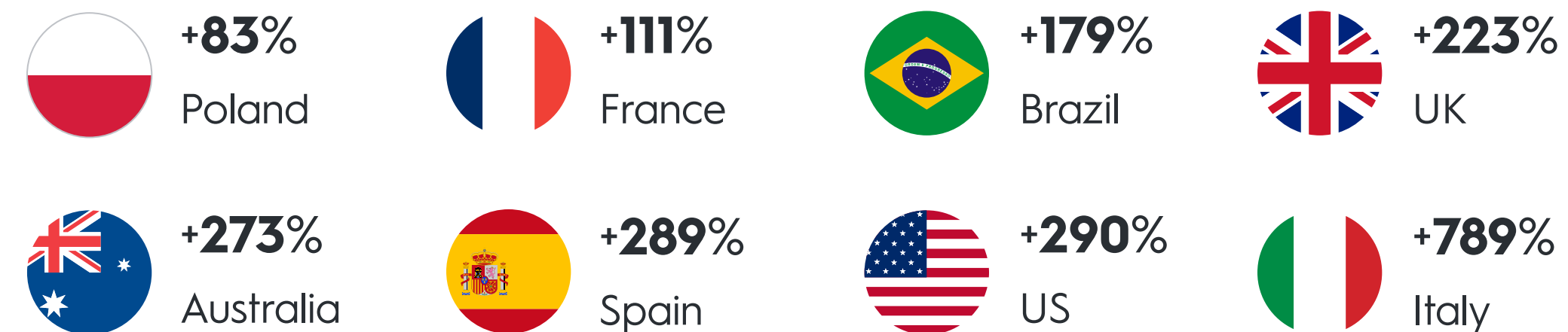
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#1 Do-It-Yourself Mentality

Baking

Aided by a wealth of suggested recipes, news articles, and foodie blogs, baking is a wholesome activity that can bring on feelings of comfort and abundance. According to Google Trends, searches for “banana bread” went **up 54% worldwide** in March.

Criteo data shows that in early April, sales of Baking items, like Batter & Cocoa Mixes, Bread Crumbs, Pie & Pastry Fillings, and Cookie Decorating Kits, increased in:



Daily sales stayed well above January levels throughout the end of May.²



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#1 Do-It-Yourself Mentality

Gardening

During World War II, 20 million Americans planted victory gardens which produced 40% of all fruits and vegetables consumed in the US during that time. According to online retailer Ozon, demand for seeds **rose by 20-30%** year-over-year in March.

Our consumer study revealed that many people found their green thumbs in recent weeks and plan to continue gardening¹:

 **28%**
Australia

 **33%**
UK

 **25%**
US



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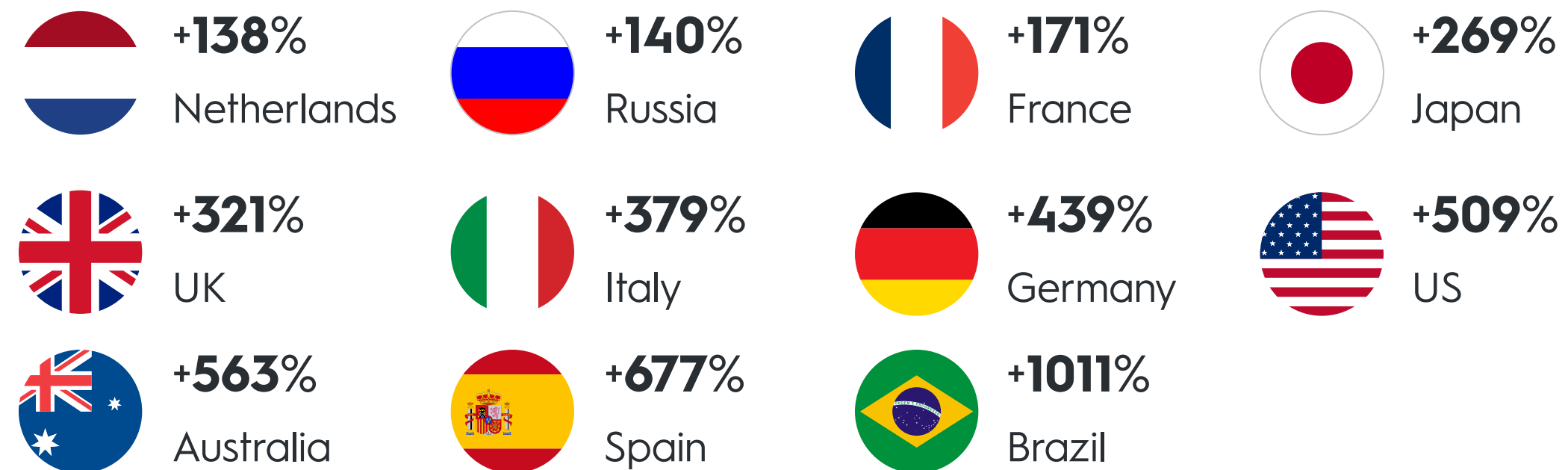
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#1 Do-It-Yourself Mentality

Puzzle-Solving

In the last half of March, US puzzle maker **Ravensburger saw sales jump by 370%** year-over-year. The coronavirus-induced surge in puzzle demand means that in 2020, Ravensburger has been selling 20 puzzles per minute in North America.

Criteo data shows that jigsaw puzzles started rising globally in mid-March. In the 30-day period from March 27 to April 26, sales were up in:



Here too, in April and May, daily sales remained higher than earlier in the year.²



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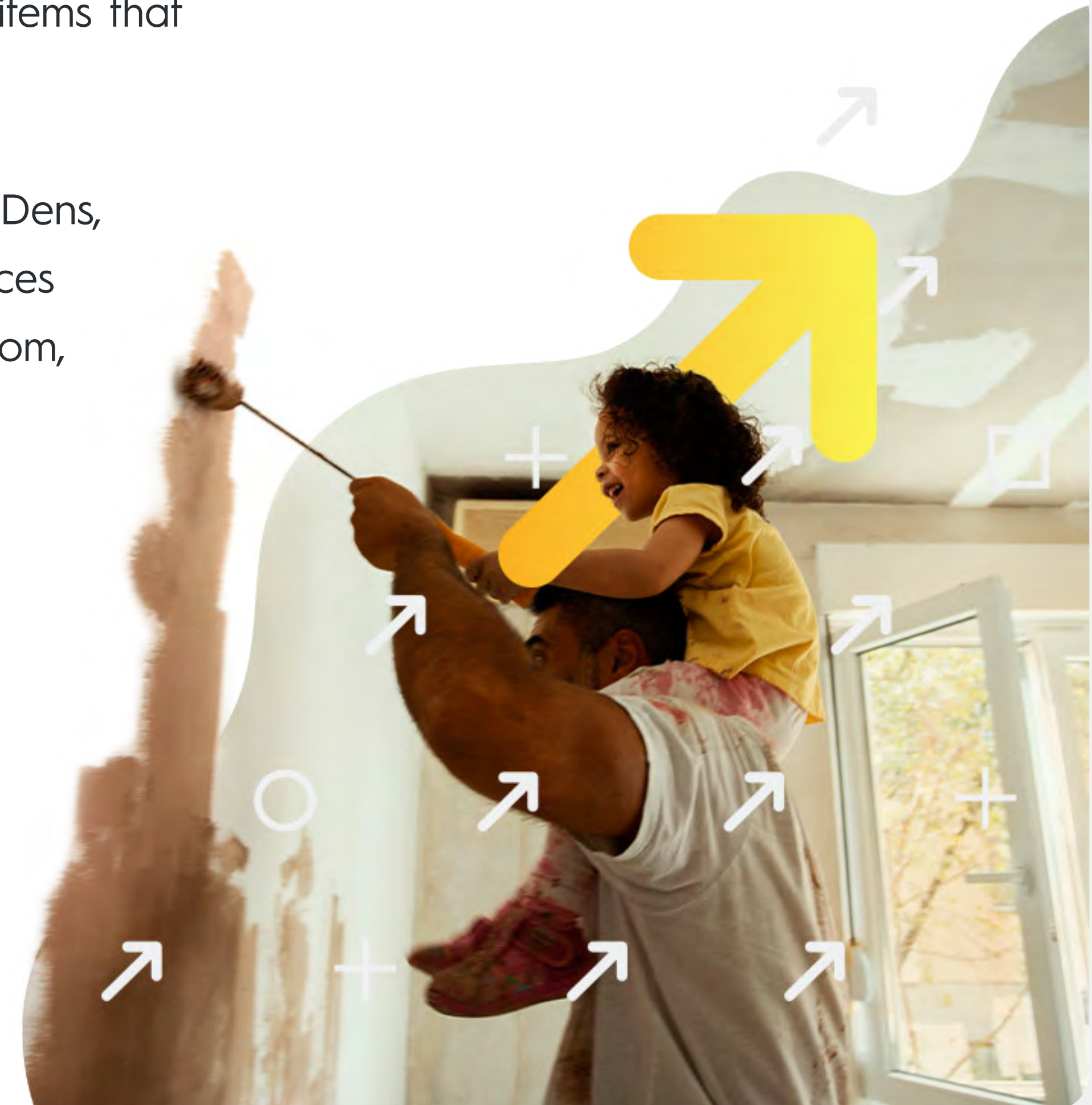
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#1 Do-It-Yourself Mentality

Across every sector of life, consumers demonstrated they were able to adjust to new conditions and loaded up on items that helped them make the most of being stuck indoors.

Houses got makeovers, apartments got rearranged. Dens, dining areas, and bedrooms became mixed-use spaces that could easily morph into the home office, classroom, restaurant, or gym.



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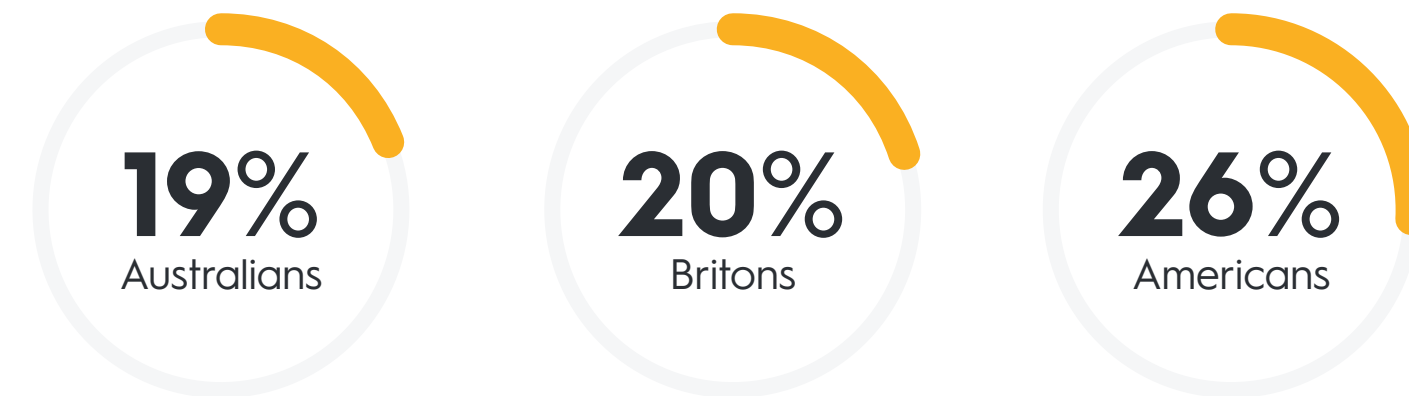
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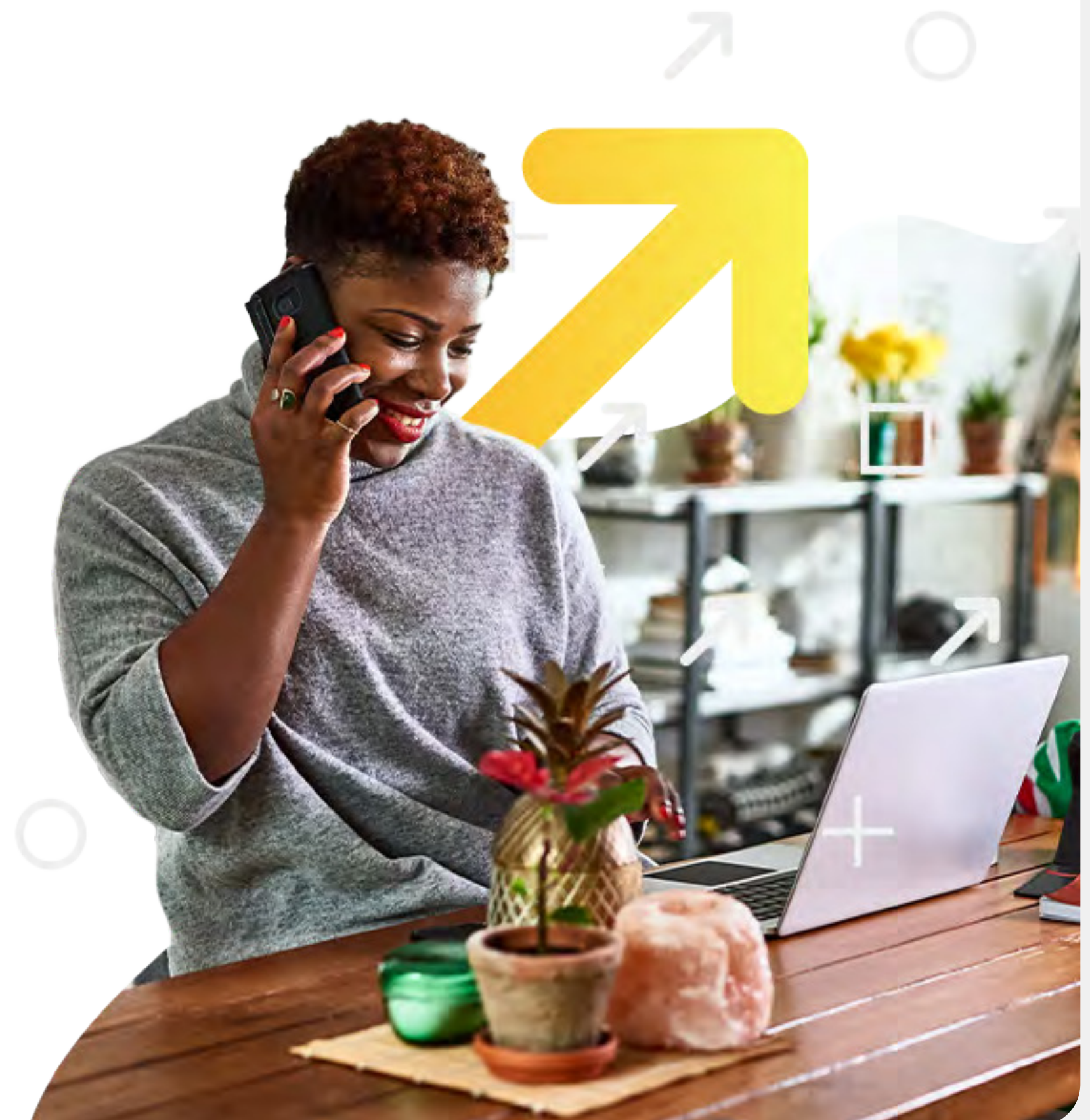
#2 Remote Work

Like fax machines and typewriters, the standard five-days-a-week office job may become a relic. According to the Federal Reserve, the share of the US labor force that works from home has **tripled in the last 15 years**. The coronavirus pandemic has only accelerated the trend. Shopify and Twitter recently told employees that they can work from home permanently.

Our survey found that:



began working from home significantly for the first time in recent months, and they plan to continue. These figures don't include those who already worked from home on a regular basis.¹



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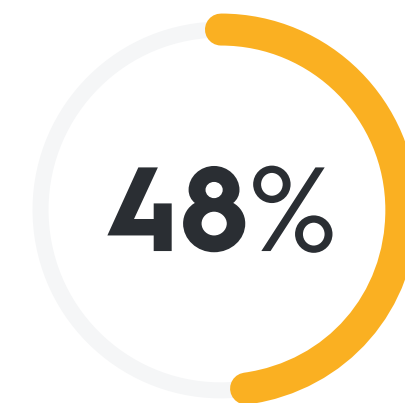
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#2 Remote Work

In addition to minimizing the spread of communicable diseases, companies have started to understand other benefits of remote work:

Productivity & Mental Health



of respondents feel more productive when working outside of the office



feel that it has a positive effect on their mental health

[ZenBusiness, March 2020]



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#2 Remote Work

Real Estate



of companies now plan to shrink their office footprint

[CoreNet Global, April 2020]

Commuting Time & Expenses



Employees who work at home half the time would save an estimated **\$2,500 - \$6,500** per year on things like gas, parking, food, and daycare, and the equivalent of **11 days per year** in time they would have spent commuting.

[Global Workplace Analytics, March 2020]

The past several months proved that many businesses can succeed when employees don't come into the office every day. All of the potential time, energy, and money saved is making companies reconsider how and where work is done. This will likely trigger a cascade effect in new types of office products and purchases.

Here's what our data has found so far:

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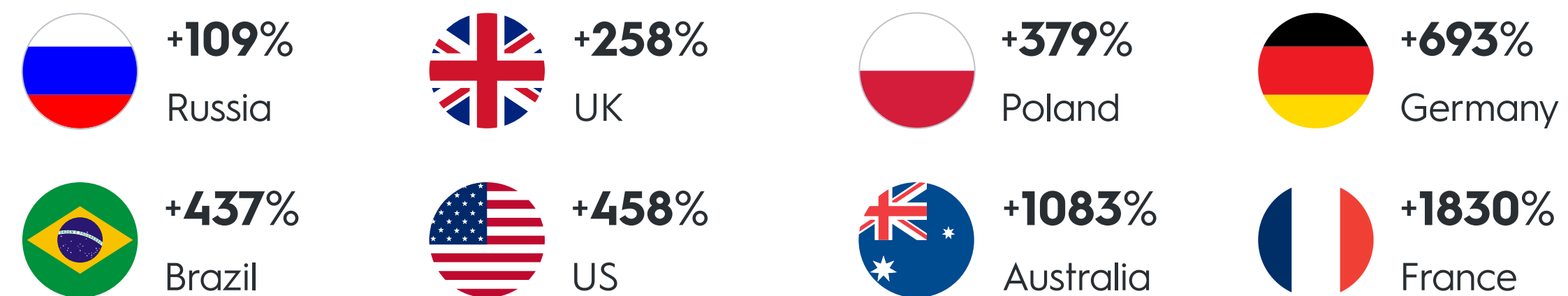
#2 Remote Work

Home Office Product Trends

Webcams

Logitech, a company that dominates the space, sold out of webcams in April. Other major retailers ran completely out of stock. For Zoom, a video conferencing app, usage took off in March—to the tune of **200 million daily meeting participants**. By comparison, in December 2019, the maximum number of daily participants was 10 million.

Criteo data shows that at the end of March, sales of webcams increased in:



compared to the first four weeks in January. By the end of May, daily sales numbers were still 2x to 3x above sales earlier in the year, in most countries.²



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#2 Remote Work

Home Office Product Trends

Desks

When stay-at-home orders first began, many may have quickly thrown a laptop on the kitchen table, repurposed the nightstand, or converted the liquor cabinet into a workstation. But as families and roommates were pressed to work in the same living space, spare rooms, garages, closets, attics, and other forgotten corners were transformed into home offices.

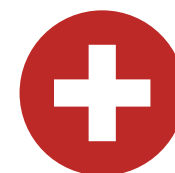
From March 15-April 12, desk sales went up in:



+25%
Spain



+45%
Germany



+93%
Switzerland



+97%
US

Office chairs:



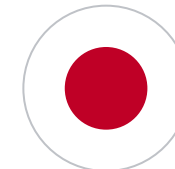
+24%
Italy



+198%
UK



+218%
Australia



+94%
Japan

General office furniture²:



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#2 Remote Work

Webcams and desks only indicate that anything related to home offices could be a big opportunity for retailers and brands.

Productivity tools, electronic accessories, and ergonomic items that help keep workers comfortable will all complement what is clearly a significant consumer trend this year.



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#3 Distance Learning

These days, the kids are at home when they're supposed to be in school. UNESCO reported that due to school closures, more than **1.2 billion children in 186 countries are not in their classrooms**. Many university classes will go virtual in the fall. Parents and students are preparing:

Gap years



students who'd planned to attend college full time in the fall no longer plan to
[Art & Science, April 2020]


+180%

in online searches for the question "What is a gap year?" during the last week of April.
[Google]



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#3 Distance Learning

Home School

Our “Peak to Recovery” survey shows that on average globally, about one in 10 parents believe they’ll continue home schooling their kids!:

 7%
Australia

 9%
UK

 11%
US

Considering there were **56.6 million elementary, middle, and high school students in the US alone in 2019** according to the National Center for Education Statistics, the need for alternative ways to educate a sizeable portion of the global population is growing—and so is the need for products that help students learn, play, and create.



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Learning & Childcare Product Trends

Educational Software & Hardware

In the 28 days from April 13 to May 10, sales of Educational Software increased in²:

 **+29%**
Japan

 **+30%**
UK

 **+36%**
Germany

 **+82%**
Brazil

 **+196%**
US

Products that help students stay connected, comfortable, and efficient, including Wireless Access Points, Audio & Video Cable Adapters, USB & FireWire Hubs, laptops, and monitors, also saw high sales.²



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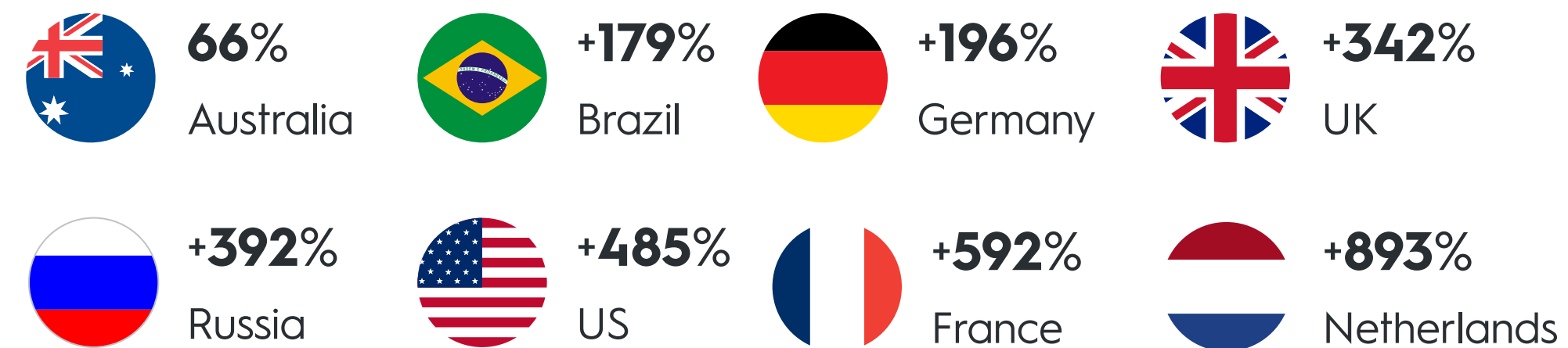
#3 Distance Learning

Learning & Childcare Product Trends

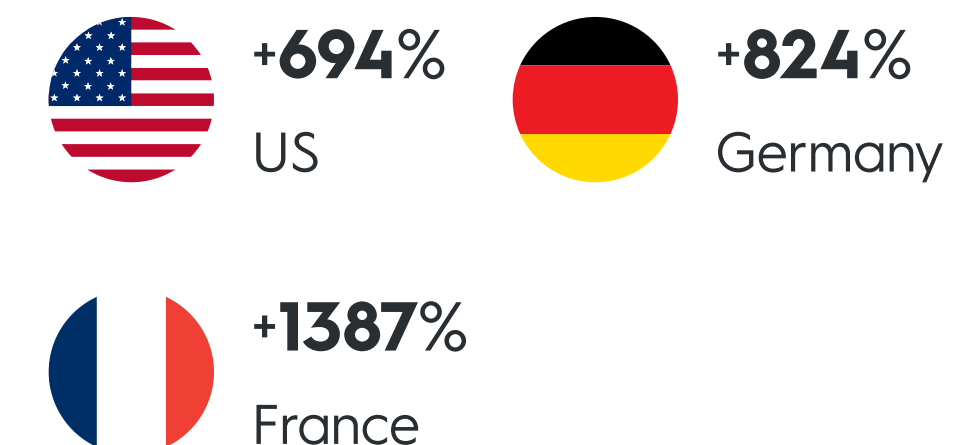
Trampolines, Swing Sets & Playsets

Toys that let kids get their energy out have jumped: The Japanese are interested in **mini trampolines**, while Americans are furnishing backyards with **bounce houses**, playground sets, and slides. MGA Entertainment, which manufactures play houses, basketball hoops, and trampolines, reported that **sales were up 100%** in March compared to 2019.

Criteo data shows that in the month from March 27 to April 26, Trampoline sales were up in:



Sales of Swing Sets & Playsets went sky high compared to January in²:



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Learning & Childcare Product Trends

Musical and Art & Drawing Toys

Without formal art classes to attend, children are **expressing themselves through drawing**, painting, coloring, and crafting. Music classes have been canceled along with the rest of school. Meanwhile, **kid-friendly music streaming** has seen double-digit increases in recent weeks.

From late March to late April, Art & Drawing Toys, which includes play dough, putty, and drawing tablets, went up in these countries compared to January.



Musical Toys were also up in²:



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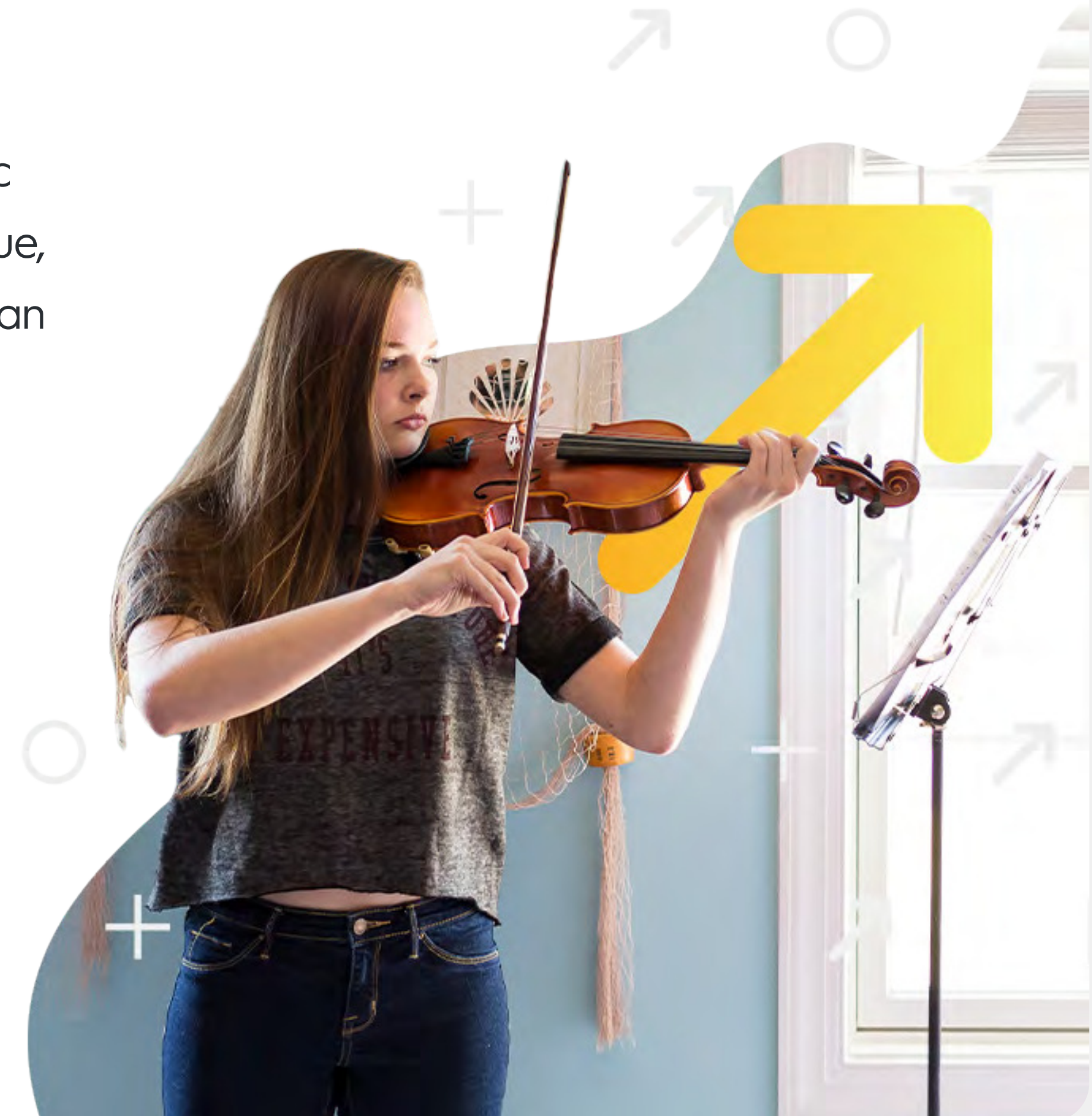
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#3 Distance Learning

Criteo data shows that in May 2020, daily sales from retailers selling Books, Video Games, and Musical Instruments were **2x higher than in May 2019**.

Based on current trends and forecasts regarding public health, we expect the online education trend to continue, and for parents to stay on the lookout for items that can keep the little ones stimulated and occupied.



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#4 Cooking at Home

Most restaurants have remained closed except for takeout and delivery in recent months, putting a new emphasis on eating at home. OpenTable estimates that one-quarter of American restaurants will go out of business due to coronavirus quarantines. Restaurant reservations were down 95% on May 13 compared to the same day in 2019.

In our survey:



of respondents said that even after the peak of the Covid-19 crisis, they are likely to continue cooking at home.¹

Even as restaurant dining rooms start to reopen, the habits formed around cooking and grocery shopping during lockdowns may be here to stay.



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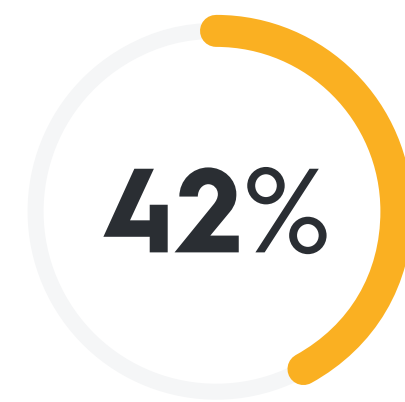
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#4 Cooking at Home

Online Grocery

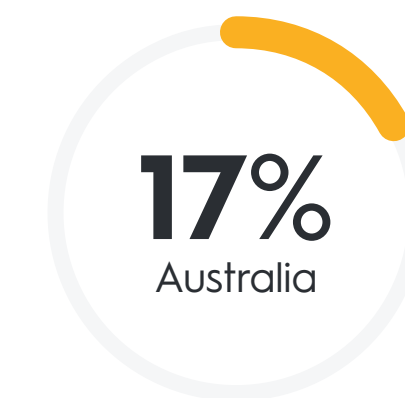
Companies built for home grocery delivery, like FreshDirect, Instacart, Peapod, and Shipt, saw a sharp rise in demand:



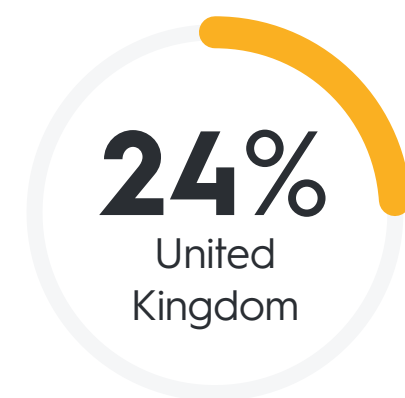
of the US population bought groceries online in 2020, **almost double** the 22% in March 2018.

[Geekwire, 2020]

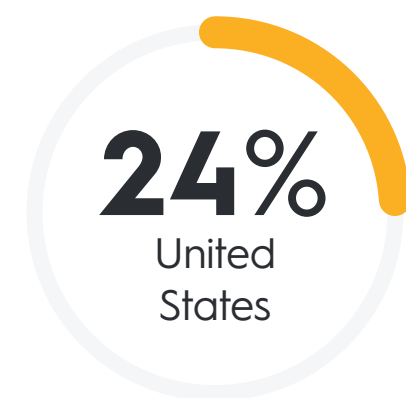
When it comes to purchasing groceries online, our study found that:



17%
Australia

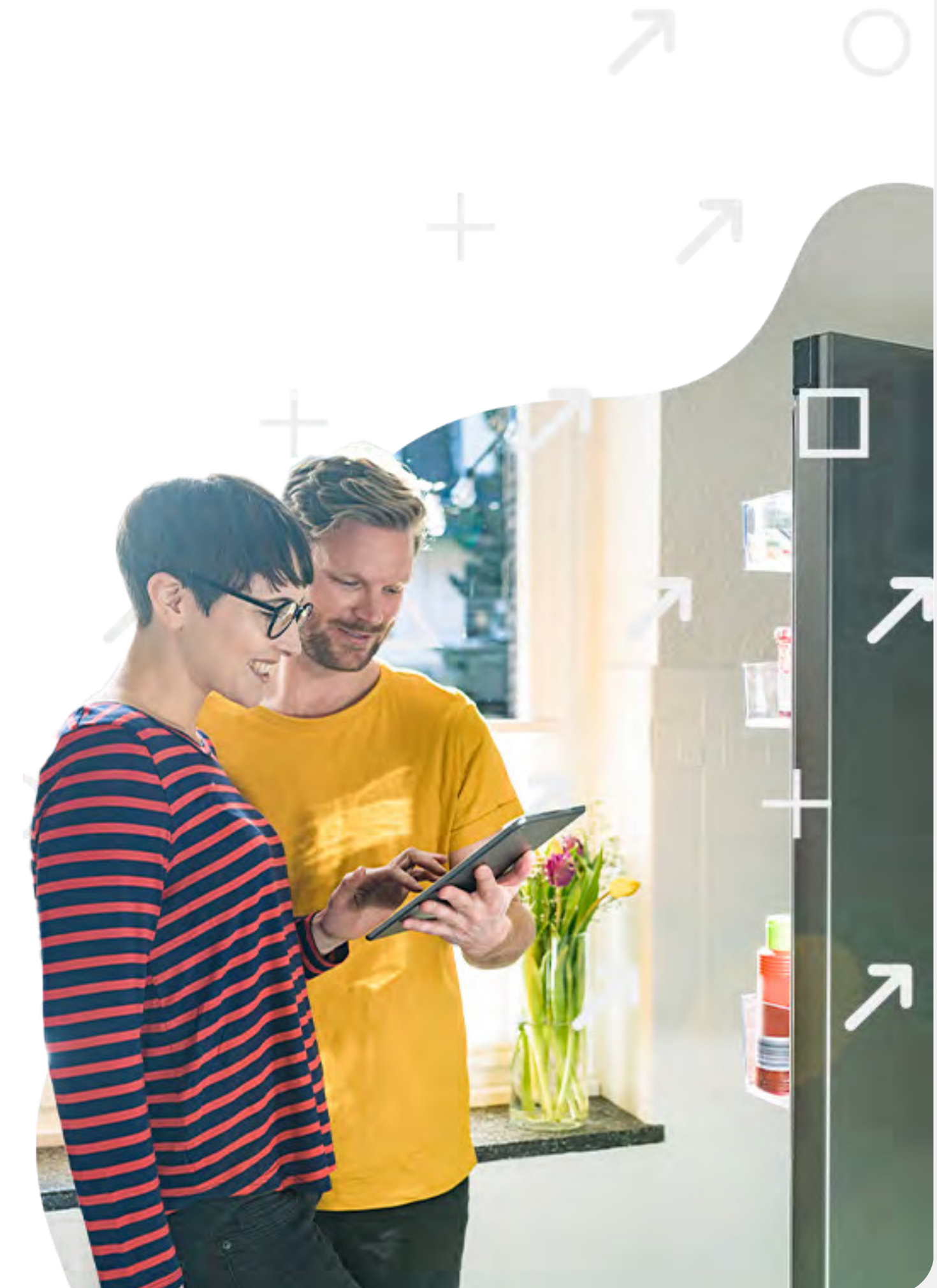


24%
United
Kingdom



24%
United
States

of respondents plan to keep doing so in the future.¹



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Grocery Apps

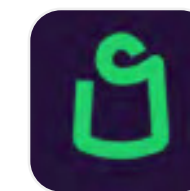
Grocery app downloads jumped significantly from February to mid-March, including:



+218%
Instacart



+160%
Walmart Grocery



+241%
Shipt

[Statista, March 2020]

Meal Kits

Online meal kit sales grew:

↑ 63%

in the week ending April 15, compared to the previous year.

[Earnest Research, April 2020]



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#4 Cooking at Home

As we look toward the future, concepts like ghost kitchens—food halls housing several restaurant operators preparing food for takeout or delivery—are catching on. Ideas like this mitigate financial risks for business owners and health risks for everyone.

Combined with Criteo data on food products, it's clear that a more-eating-at-home trend is here to stay.



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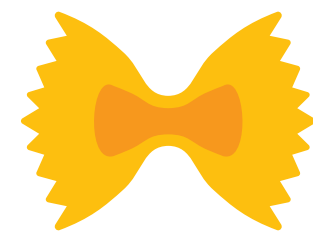


#4 Cooking at Home

Grocery Product Trends

Pasta Sauce, Cooking Oils, & Cheese

Throughout a peak period of the crisis in the US, March 15-April 12, Americans stocked up on ingredients for quick, easy meals²:



+635%

Pasta sauce

Cooking Oils, Cheese, and Nut Butters, as well as more niche items like Tofu, Soy & Vegetarian products, also made it into shopping carts.²



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#4 Cooking at Home

Grocery Product Trends

Noodles, Soups, & Sauces

Pasta & Noodles sales rose:



+55%
Japan

+95%
Southeast Asia

Soups & Broths sales rose:



+58%
South Korea

from March 15 - April 12, compared to the average in January. Throughout the APAC region, flavorings like Seasonings & Spices and Condiments & Sauces were also popular.²



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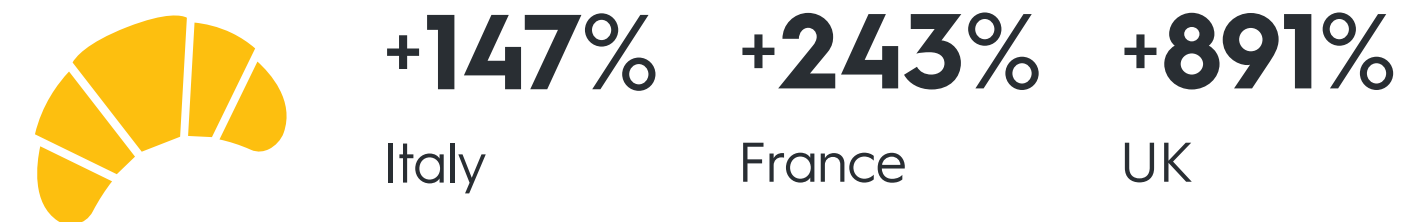
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Grocery Product Trends

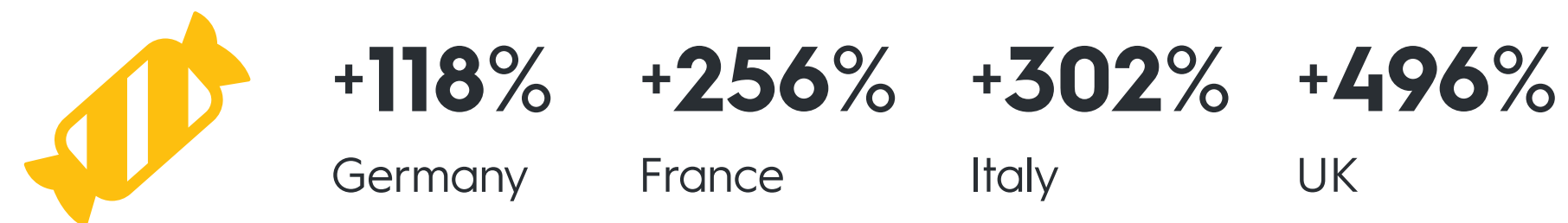
Breads, Pastries, & Chocolate

Breads & Pastries sales rose²:



from March 15-April 12, compared to the average in January.

Candy & Chocolate also saw spikes in²:



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#4 Cooking at Home

At the end of May, Criteo data shows that most food categories were still significantly above early year numbers, in all countries.

And while there will always be a need for consumable food products, retailers and brands that sell complementary items like kitchen appliances, cooking tools and accessories, food storage solutions, and even cookbooks stand to capitalize on the domestic momentum in the future.



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Gyms are starting to reopen, but even with machines spaced six feet apart, it may be a long road before consumers feel comfortable around all that heavy breathing.

Our survey found that:



of respondents plan to keep exercising at home in the months ahead!



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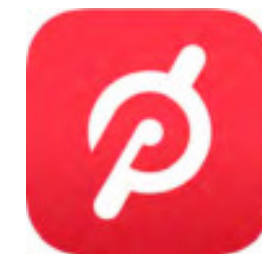
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#5 Home Exercise

During the period when gyms were shuttered, consumers found plenty of alternative ways to stay fit:

Stationary Bikes

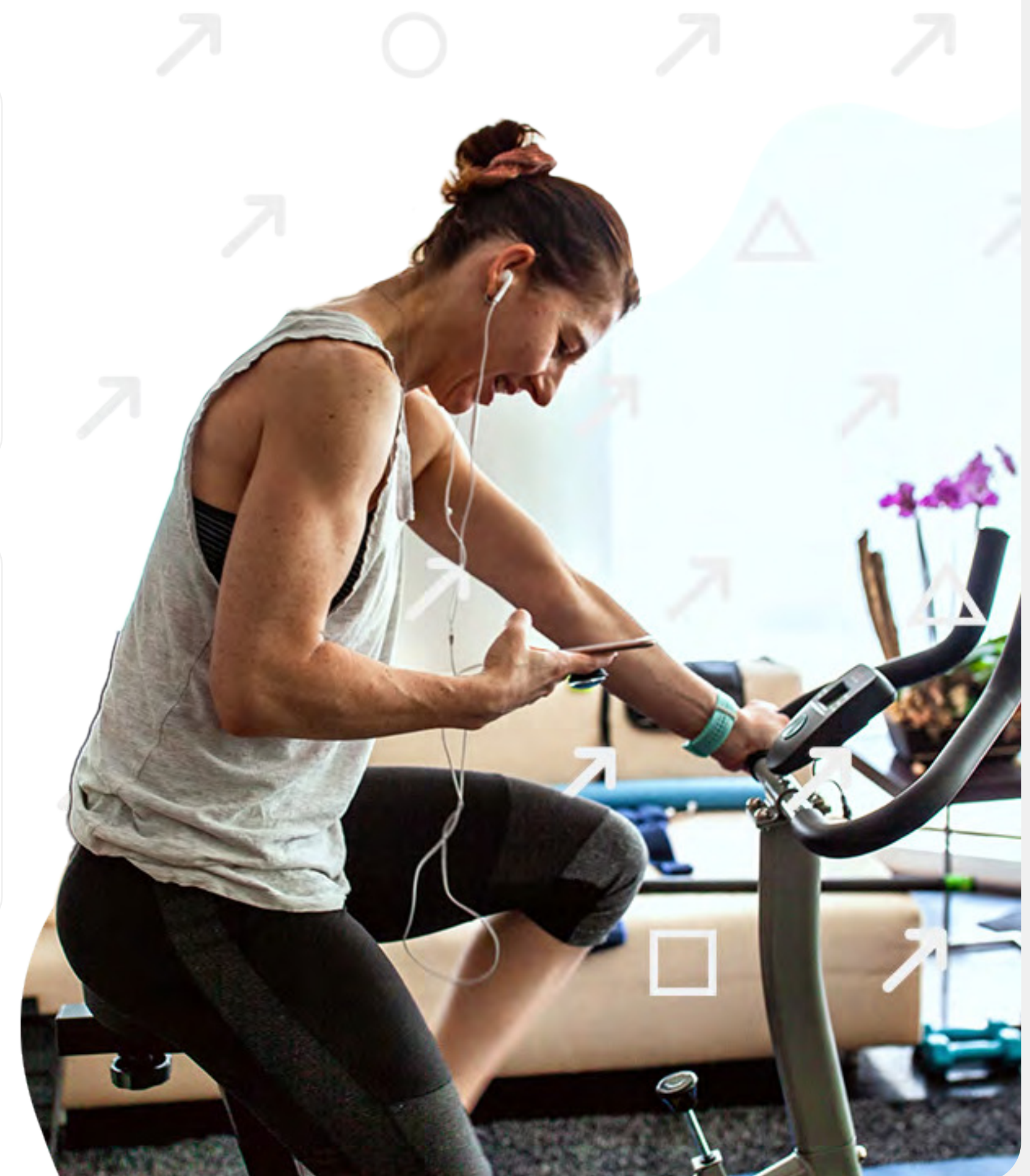


Peloton makes internet-connected bikes that cost more than \$2000 and has seen its stock **rise 86% since March** when over 23,000 people joined its streaming online classes.

Exercise Apps



According to Apptopia data, an app called "Home Workout - No Equipments" has been downloaded more than **10 million times globally** since mid-March.



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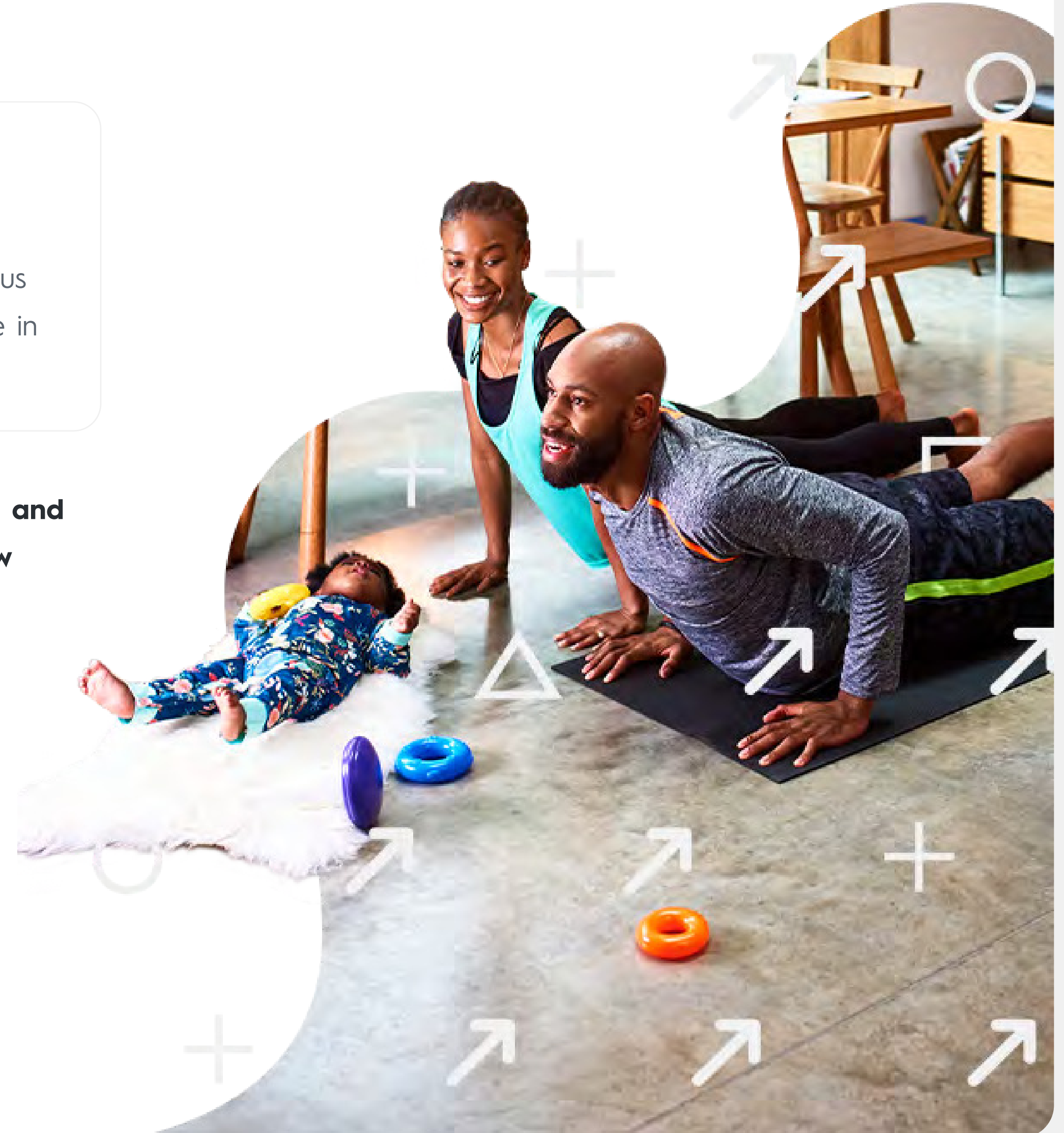


#5 Home Exercise

On-Demand Workouts

A video called "How to Adjust Training & Diet for Coronavirus + At-Home Workouts" got over **1.6 million** views on YouTube in less than two months.

Along with personal training content that's easily accessible and often free, Criteo data shows that many households are now well-equipped for fitness.



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Fitness Product Trends

Exercise Bands

In the spirit of solo home workout routines, these stretchy pieces of rubber provide a lot of muscle-developing resistance in confined spaces.

Exercise Band sales rose:



compared to the first four weeks of the year. Also easy to store and right-sized for small spaces, exercise benches and exercise balls trended up in March as well.²



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Fitness Product Trends

Sporting Goods on Wheels

Warmer weather is on the horizon, and consumers are heading outdoors with products that help them maintain social distancing. Compared to the average in January, the four week period from April 13 to May 10 saw sales increase for a variety of on-the-move products:

Inline & Roller Skates:



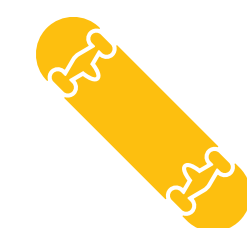
+142%
US

+386%
Russia

+647%
Netherlands

+563%
Germany

Skateboarding:



+54%
Brazil

+62%
Australia

+127%
UK

+230%
Germany

+493%
Netherlands

+612%
Russia



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Fitness Product Trends

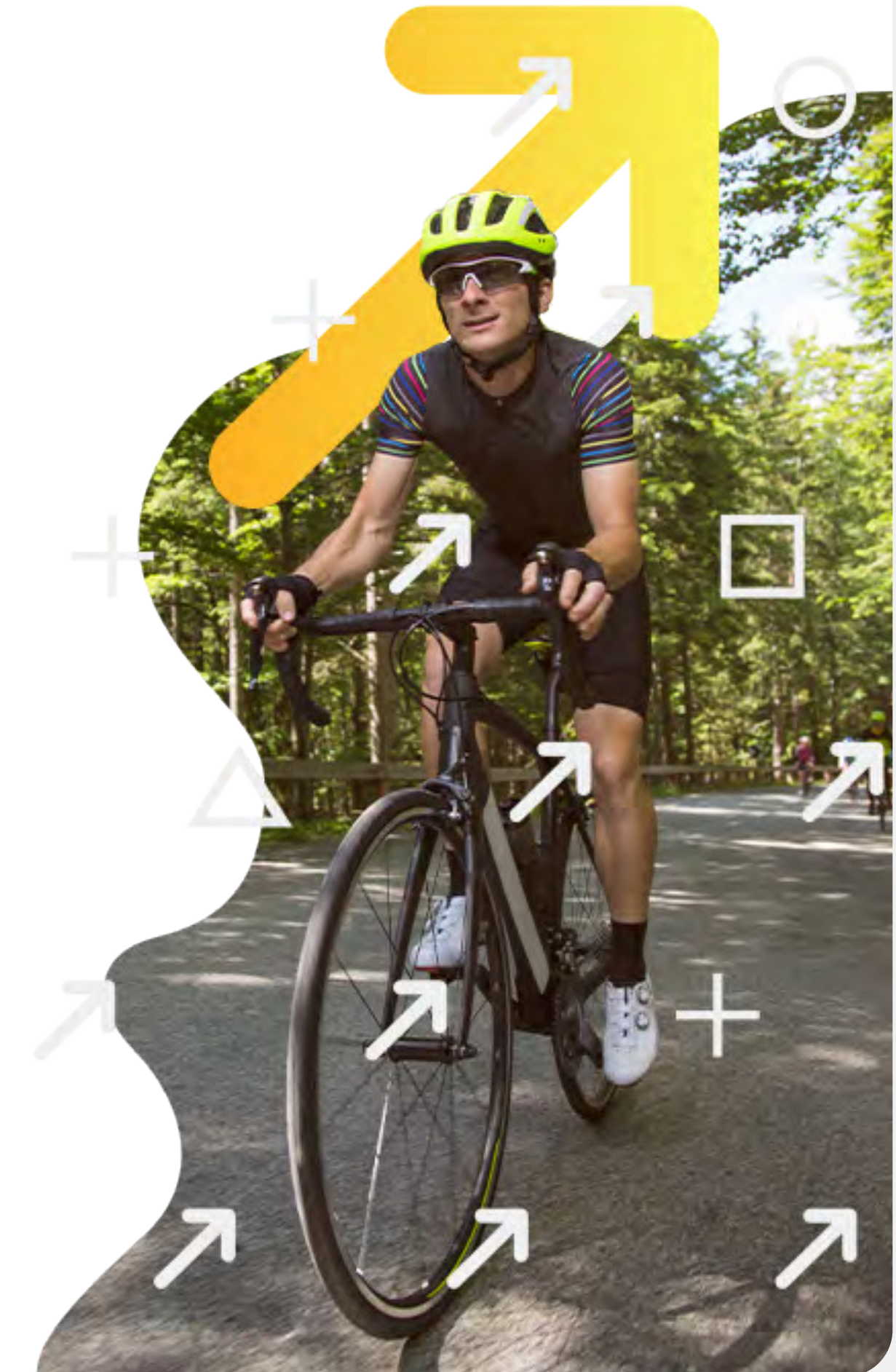
Sporting Goods on Wheels

Cycling Gear:



+25% Australia	+30% Japan	+42% South Korea	+71% France	+78% Brazil
+102% Poland	+108% US	+140% Spain	+152% Netherlands	+169% UK
+183% Italy	+194% Germany	+394% Portugal	+395% Turkey	+480% Russia

By the end of May, Criteo data shows that online sales of Sporting Goods remained above sales in the category during the same period of the year in 2019, globally.



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Connecting in the New Normal(s)

There'll be no quick return to "the way things were" before coronavirus, but there will be many new normals. People are learning to cope with trade-offs and adaptations that touch every aspect of life.

Regional differences will be very significant as marketers start to build campaigns—towns, cities, states, countries, and continents may all start to diverge when it comes to both attitudes and shopping patterns.

The most important part of marketing, however, will remain the same: finding the right audience and creating a message that resonates.

 **20,000** Brands & Retailers

 **2B** Active Monthly Shoppers

The Criteo Ad Platform can offer unparalleled opportunities when it comes to creating targeted ads that find the best possible customers for your business.



About Criteo

Criteo (NASDAQ: CRTO) is the global technology company powering the world's marketers with trusted and impactful advertising. 2,800 Criteo team members partner with over 20,000 customers and thousands of publishers around the globe to deliver effective advertising across all channels, by applying advanced machine learning to unparalleled data sets. Criteo empowers companies of all sizes with the technology they need to better know and serve their customers.

Sources

¹ Peak to Recovery Survey, Global, May 2020, N=17,295 respondents from 19 countries, May-June 2020

² Indexed weekly sales, compared to average from Jan 1-28, 2020.

For more information please visit:

www.criteo.com

