



29%

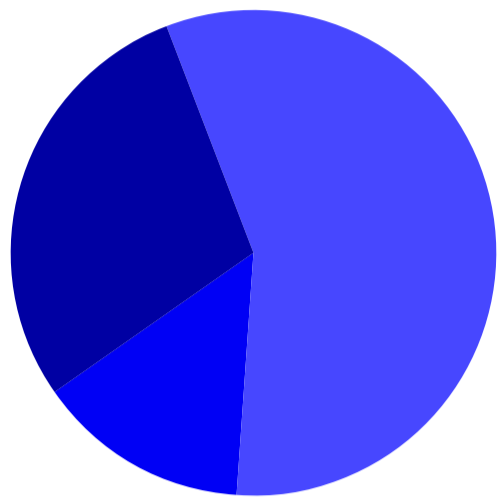
OF U.S. CONSUMERS WILL INCREASE LONG-TERM USE OF DIGITAL CHANNELS DUE TO COVID-19 CRISIS

Kameleoon and Widerfunnel/Go Group Digital commissioned research with 5,128 consumers, split between the United States, United Kingdom, France, Germany and Italy. Around 1,000 consumers were surveyed in each country at the beginning of May 2020.



CONSUMERS SWITCHING TO DIGITAL THANKS TO CRISIS

Will you use digital channels more long-term or switch back to offline?



29% Yes, 57% I'll use both, 14% No, I'll return to offline channels

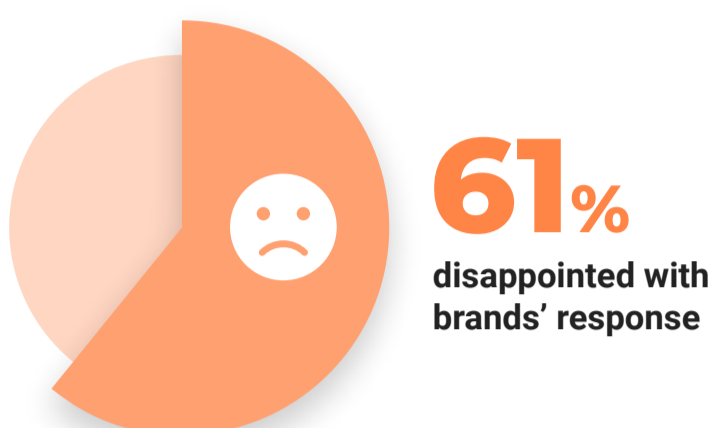
Will you use digital channels more long-term or switch back to offline?

	YES	BOTH	NO
GLOBAL	24%	61%	15%
ITALY	28%	63%	9%
UK	27%	58%	15%
FRANCE	22%	61%	17%
GERMANY	16%	65%	19%

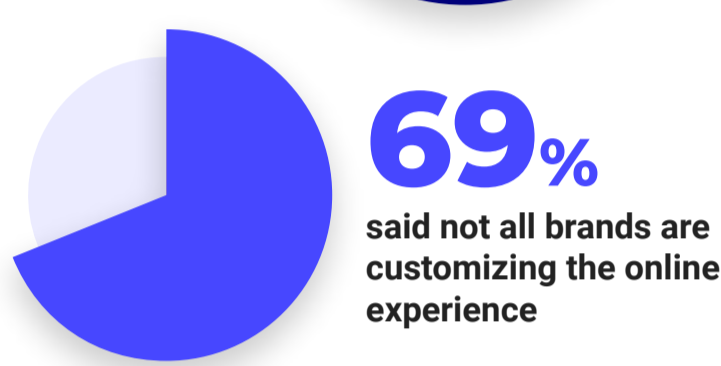
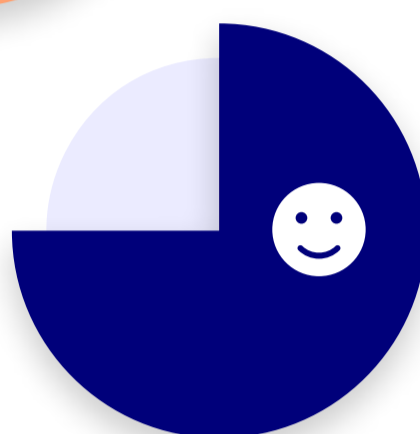


BRANDS NOT DELIVERING THE REQUIRED PERSONALIZED ONLINE EXPERIENCE

Are US brands providing the personalized experience you currently need?



75% expect brands to personalize their journey



Consumer attitudes to personalization

GLOBAL			
57%		73%	
☹️		😊	
UK	FRANCE	GERMANY	ITALY
59%	73%	58%	72%
54%	63%	54%	82%
☹️	😊	☹️	😊

☹️ Disappointed with brands, 😊 Expect personalization

LACK OF PERSONALIZATION WILL HIT LOYALTY AND BRAND REVENUES

How will the current online experience offered by brands impact your future purchases?

IT WILL CHANGE MY BEHAVIOR +73%

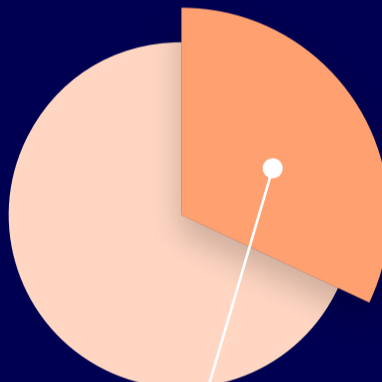
I WILL BUY LESS/SWITCH FROM BRANDS THAT OFFERED A POOR ONLINE EXPERIENCE +42%

I WILL BUY MORE/SWITCH TO BRANDS THAT OFFERED A STRONG ONLINE EXPERIENCE +31%

How will the current online experience impact your future purchases?

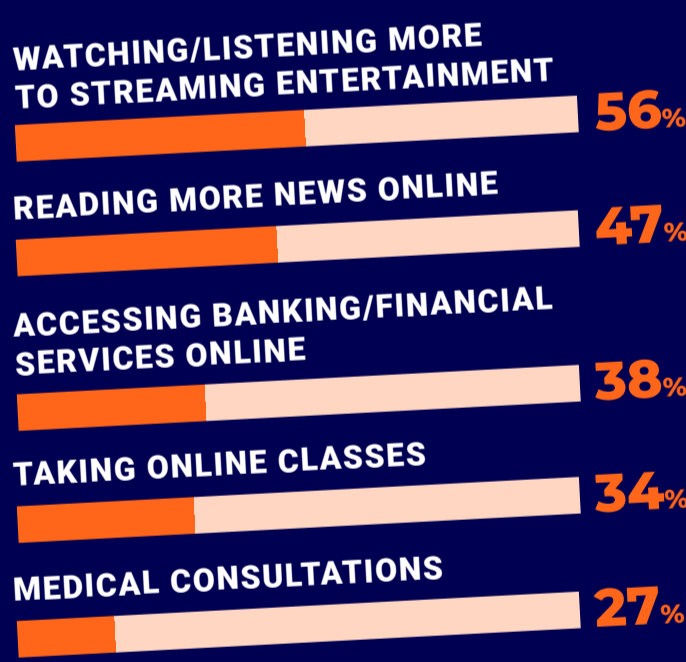
GLOBAL			
67%			
ITALY	UK	FRANCE	GERMANY
79%	73%	59%	52%

% say current online experience will impact future purchases



37% using digital channels more during the crisis

What activities are you now doing more of online?



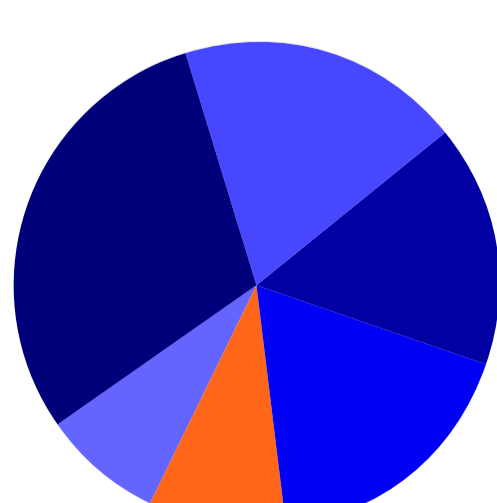
Are you spending more time online?

GLOBAL			
34%			
ITALY	UK	FRANCE	GERMANY
42%	32%	32%	24%

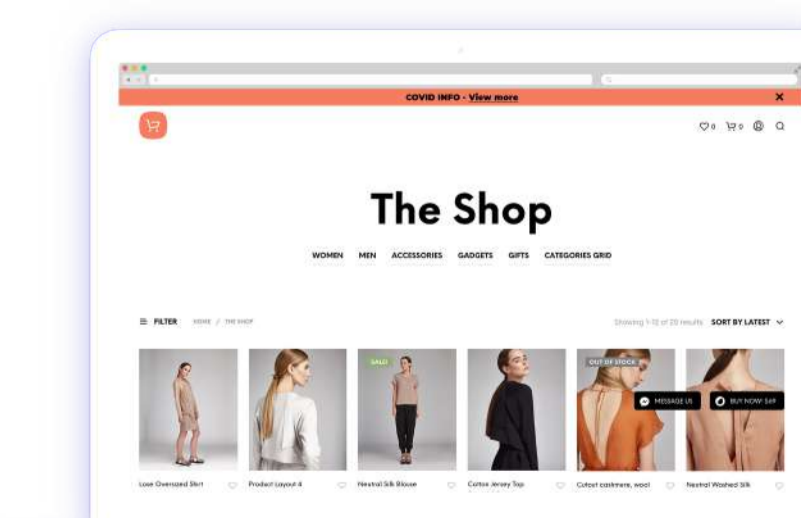
% saying they are spending more time online

WHAT BENEFITS DO YOU SEE FROM DIGITAL CHANNELS?

30% Save money, 19% Greater choice, 16% Save time



18% Find out more on products, 9% Brands can track my personal data, 8% Build a closer relationship with brands



Biggest benefit in other countries

GLOBAL			
26% 💰			
UK	FRANCE	GERMANY	ITALY
31% 💰	34% ⌚	26% ⌚	26% 💰

💰 Saving money, ⌚ Saving time