

Global Consumer Trends & How Companies Can Leverage Them

June 5, 2019

Changing Consumer Behavior, Spending Patterns, and Economic Confidence
Across the World



Topics on today's webcast

1. Consumer confidence, spending intentions & concerns
 - ✓ Consumer confidence and spending sentiment: snapshot & trends
 - ✓ Plans for spending on certain categories (new clothes and technology)
 - ✓ Consumers' top concerns
2. Consumer behavior trends
 - ✓ Mobile as dominant digital channel
 - ✓ Shopping by voice
 - ✓ Healthcare by tech companies
 - ✓ Cord cutting and online streaming



Today's Presenters



Matt Egol
Partner, Strategy& and
Chief Strategy Officer,
Digital Services
PricewaterhouseCoopers



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Co-Leader, Consumer
Dynamics Institute
The Conference Board



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Vice President
*The Demand Institute
& Nielsen*



Denise Dahlhoff
(Moderator)
Senior Researcher,
Consumer Research
The Conference Board

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CPE (NASBA)

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- ✓ Click 'ok' for 3 popups that occur during the program
- ✓ Stay online for the entire webcast
- ✓ Credit available for participation in live webcast only



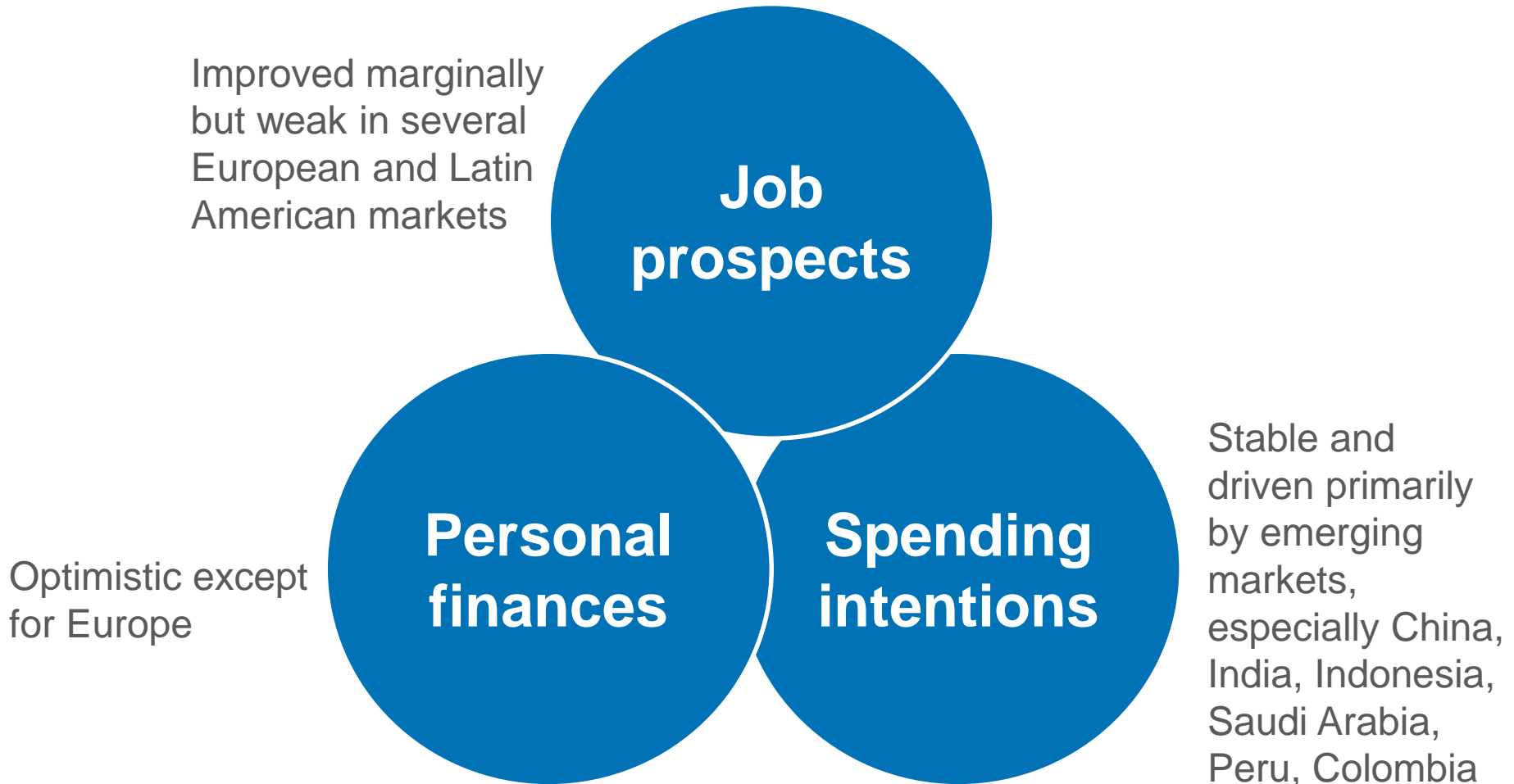
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Taking Stock of the Consumer World

Consumer Confidence

Components of economic confidence



Source: *The Conference Board Global Consumer Confidence Index, in collaboration with Nielsen.*
Comments based on Q1 2019 results.



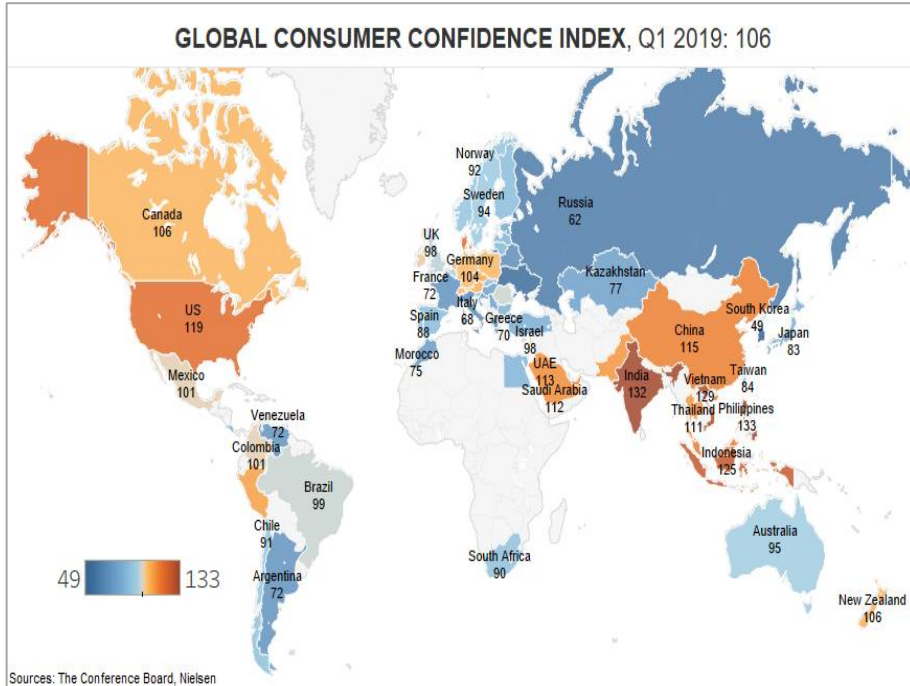
Global Consumer Confidence historically high

Large economies maintain high confidence levels (U.S., China, India, Germany)

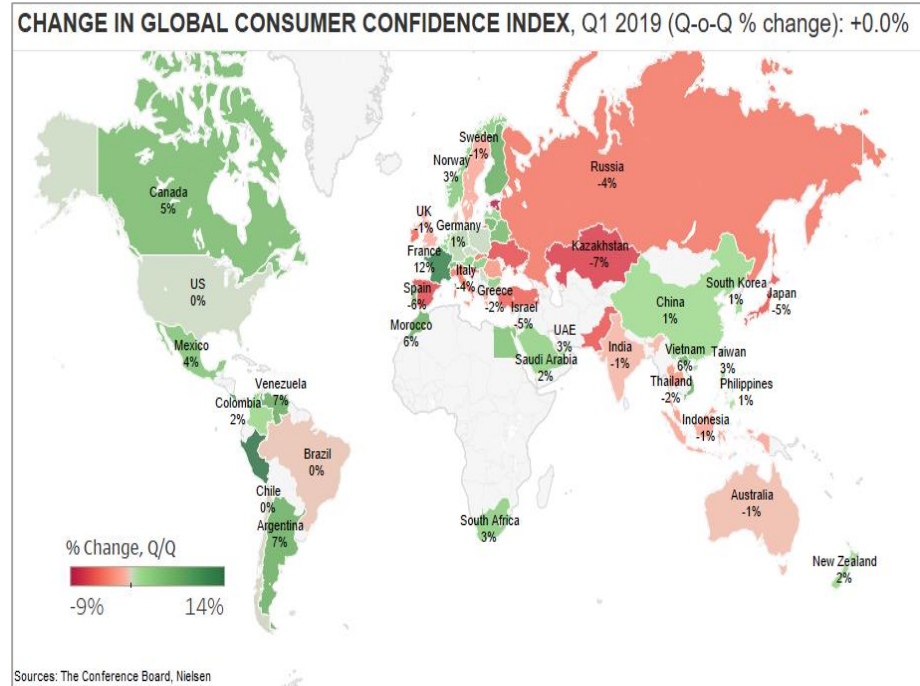
Challenging changes in Russia, parts of Latin America, Asia, and Europe

32,000 respondents in 64 countries

GLOBAL CONSUMER CONFIDENCE INDEX, Q1 2019: 106



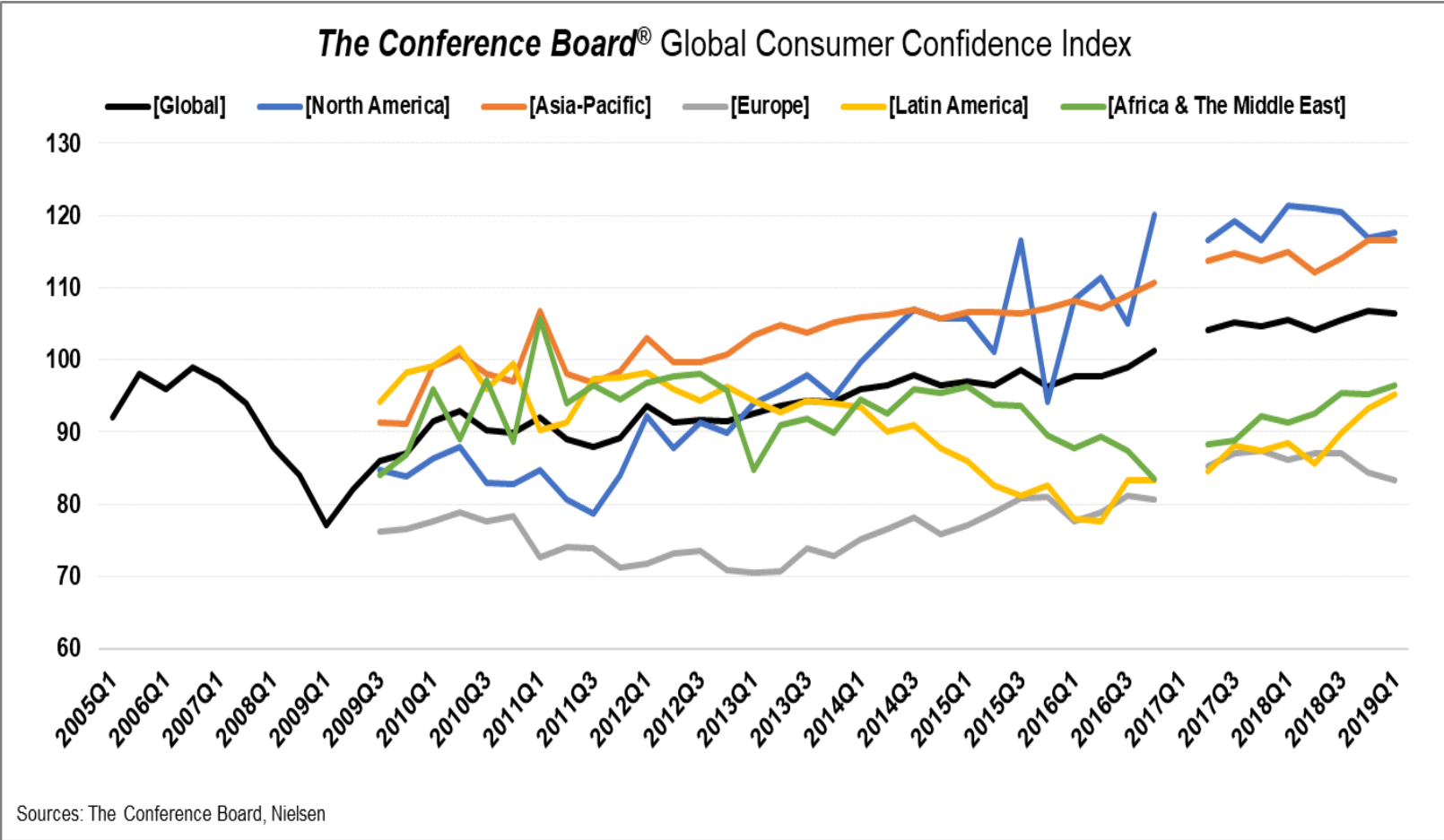
CHANGE IN GLOBAL CONSUMER CONFIDENCE INDEX, Q1 2019 (Q-o-Q % change): +0.0%



Source: The Conference Board Global Consumer Confidence Index, in collaboration with Nielsen, Q1 2019



How high can it get? Where do we go from here?



Source: The Conference Board Global Consumer Confidence Index, in collaboration with Nielsen



Consumers' Spending

Spending sentiment

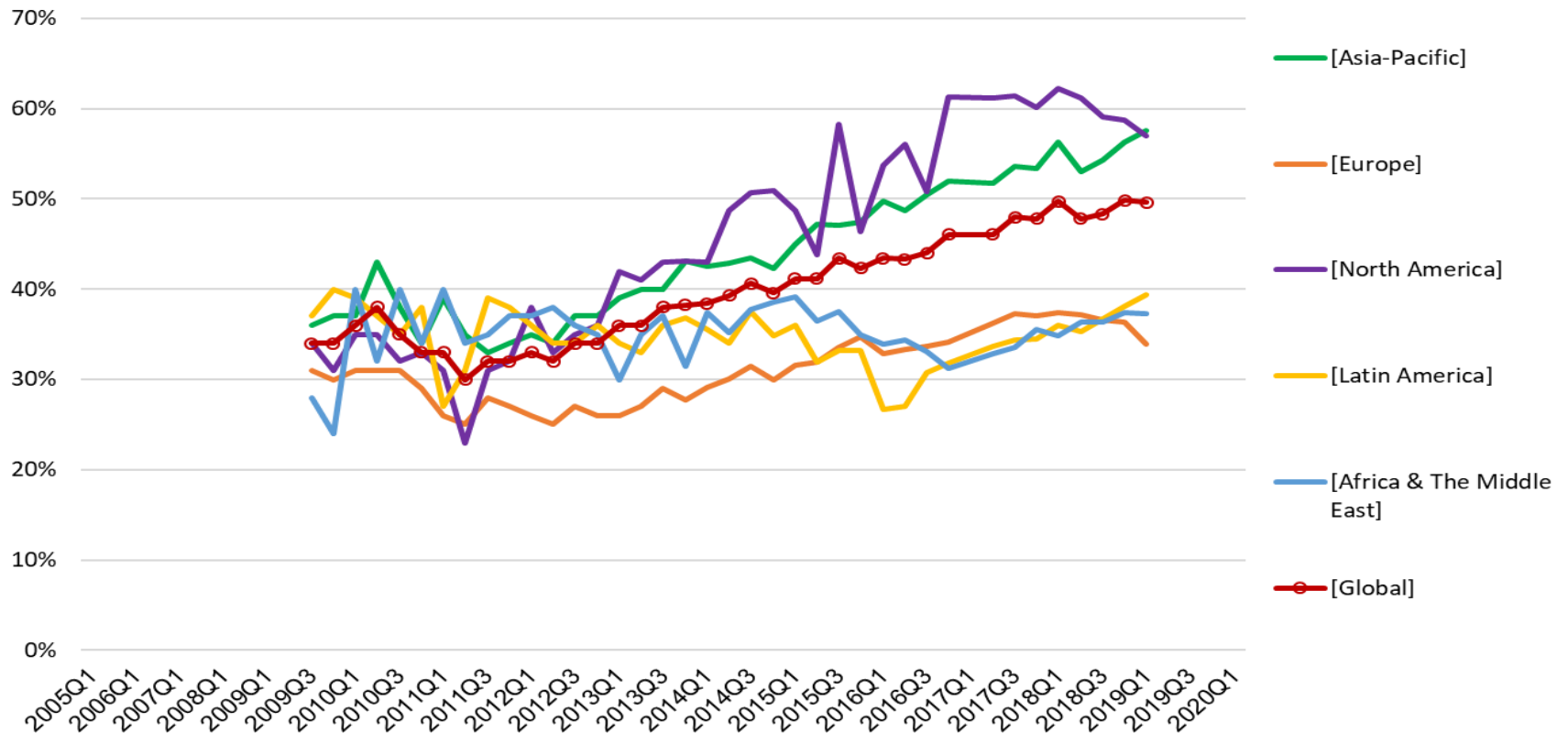
Asia-Pacific & Latin America



North America & Europe



How good a time it is to buy needed/wanted goods and services: "Excellent" + "Good"

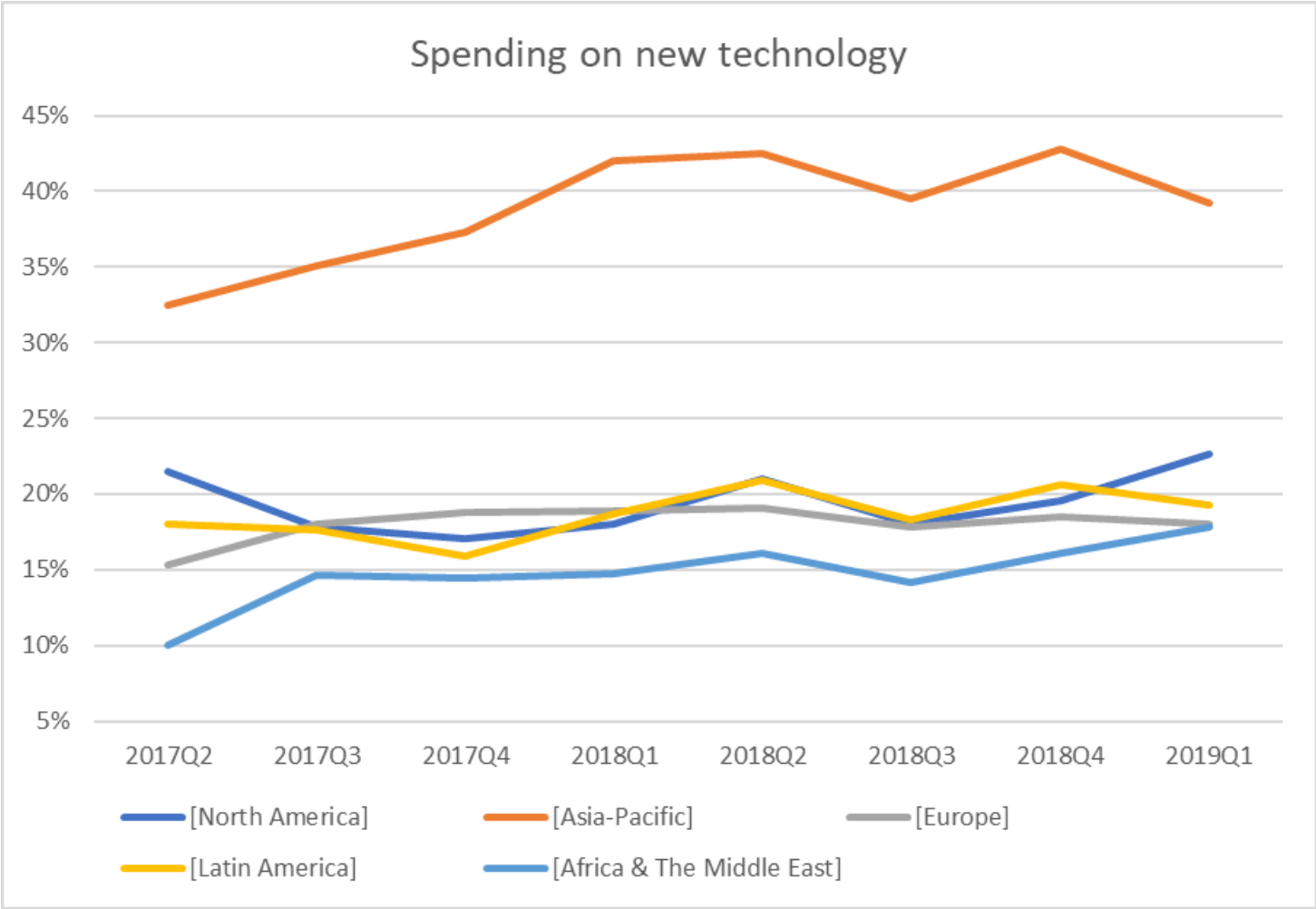


Source: The Conference Board Global Consumer Confidence Index, in collaboration with Nielsen



Audience Poll Question 1

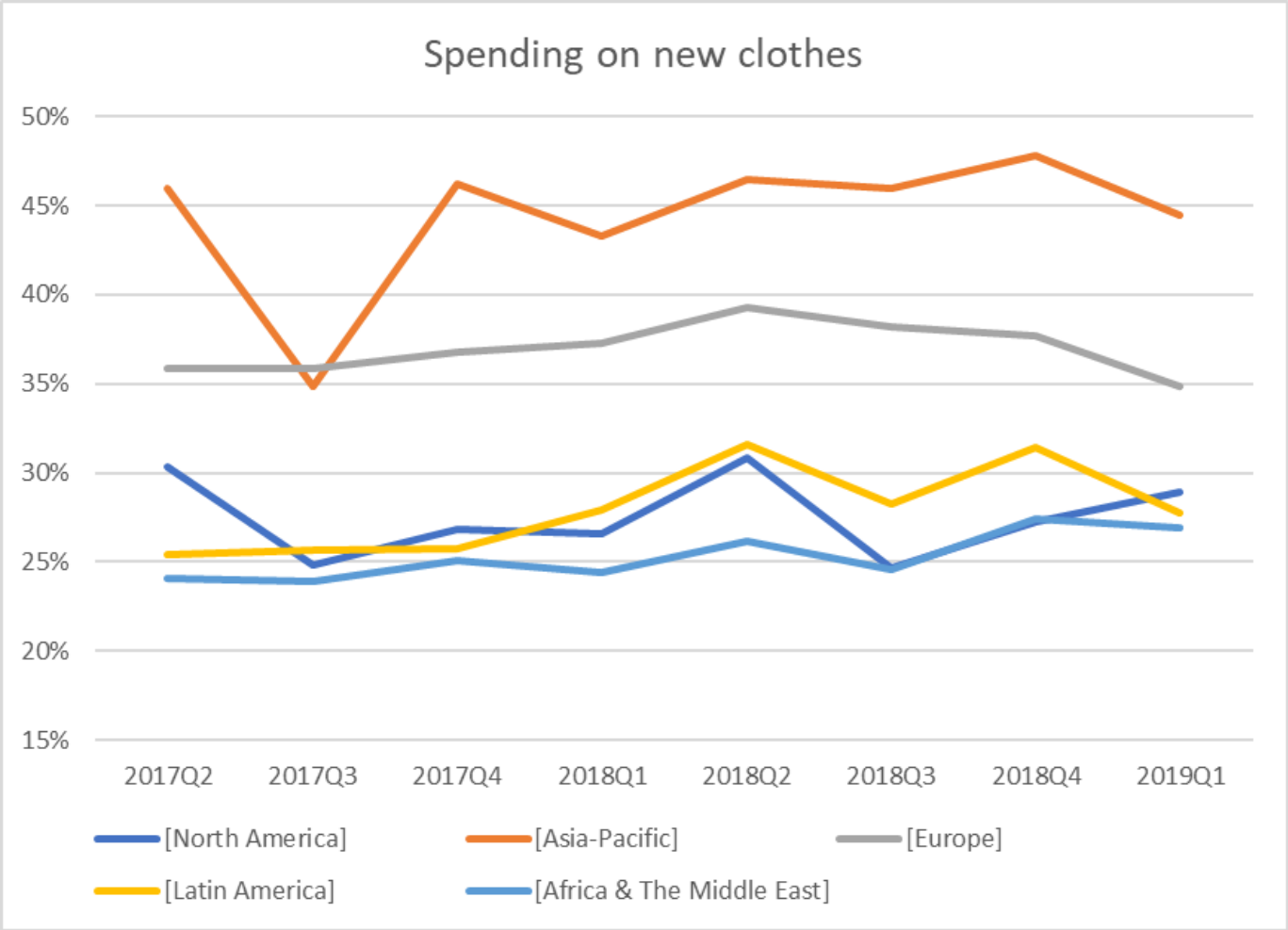
Consumers' spending: new technology



Source: The Conference Board Global Consumer Confidence Index, in collaboration with Nielsen



Consumers' spending: new clothes



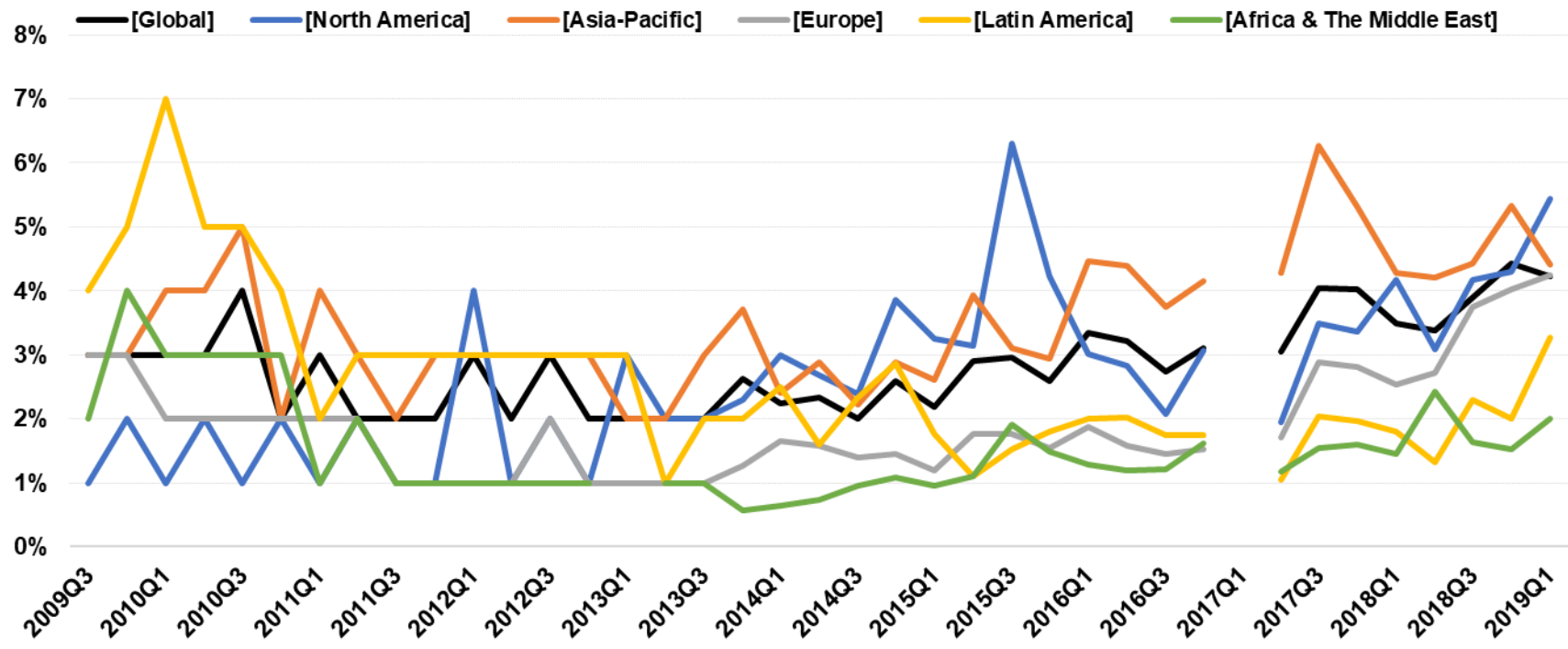
Source: The Conference Board Global Consumer Confidence Index, in collaboration with Nielsen



Consumers' Concerns

Global warming rising top concern in some regions...

2.05 Biggest concern over next 6 mos: Global warming

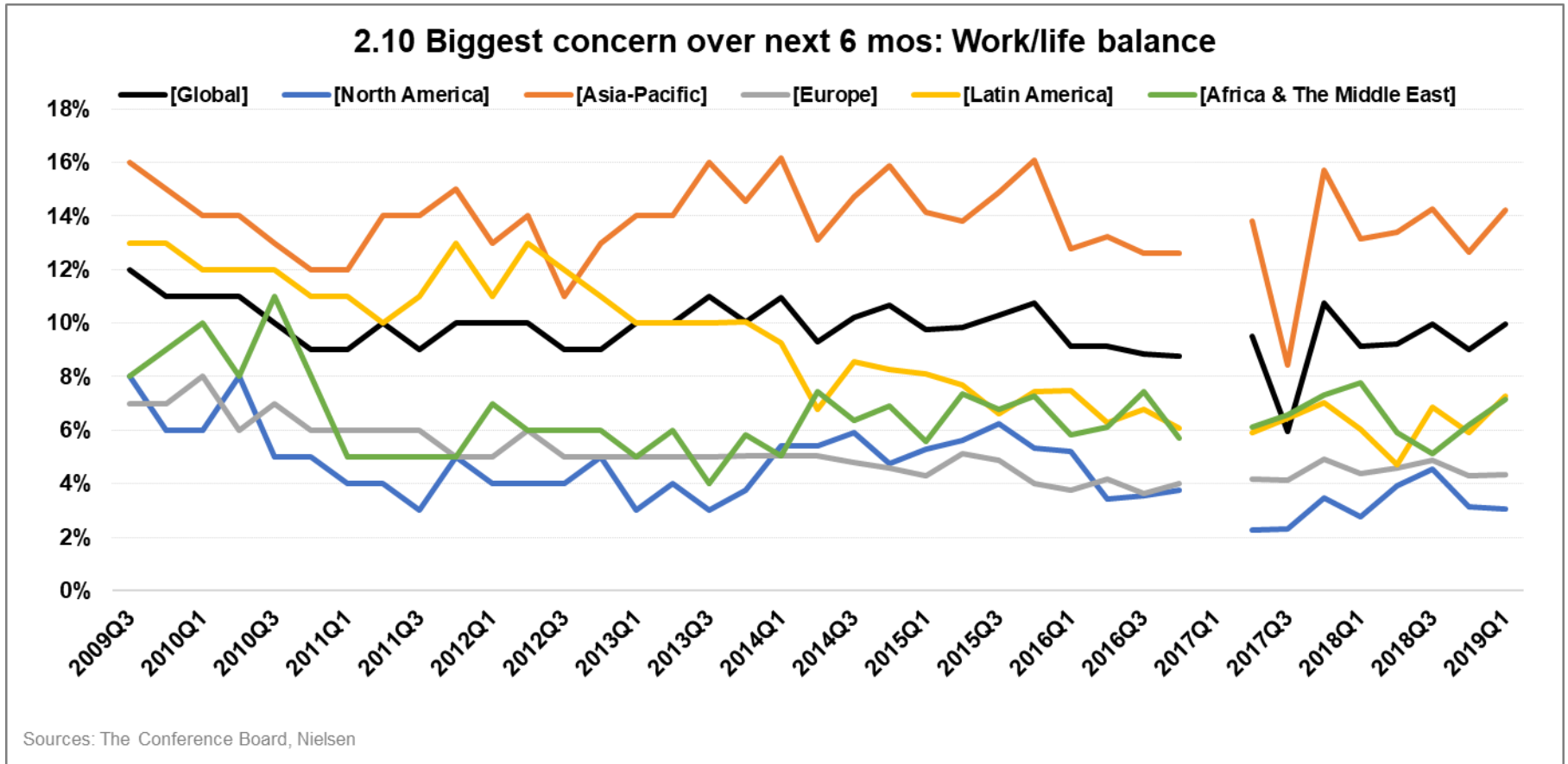


Sources: The Conference Board, Nielsen

Source: The Conference Board Global Consumer Confidence Index, in collaboration with Nielsen, Q1 2019



... as well as work-life balance

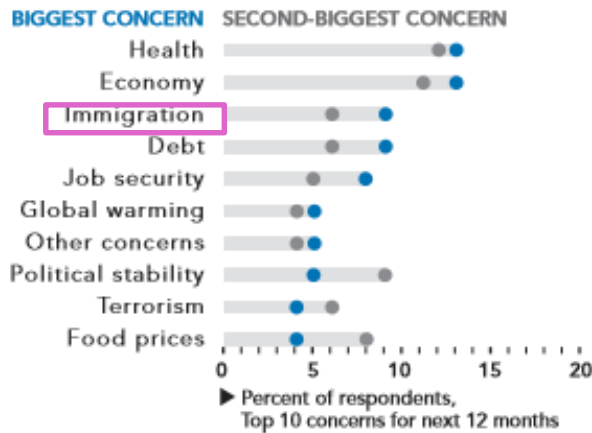


Source: The Conference Board Global Consumer Confidence Index, in collaboration with Nielsen, Q1 2019

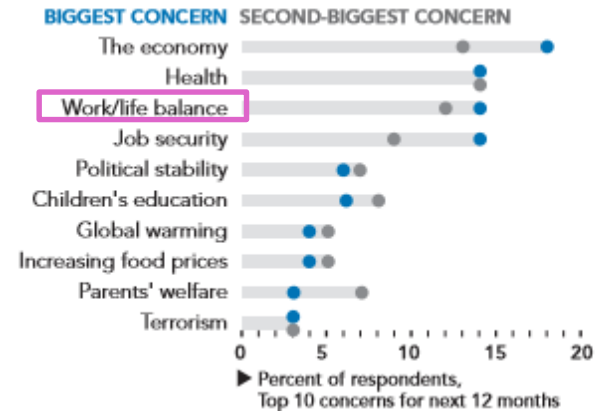


Consumers' concerns over next 12 months

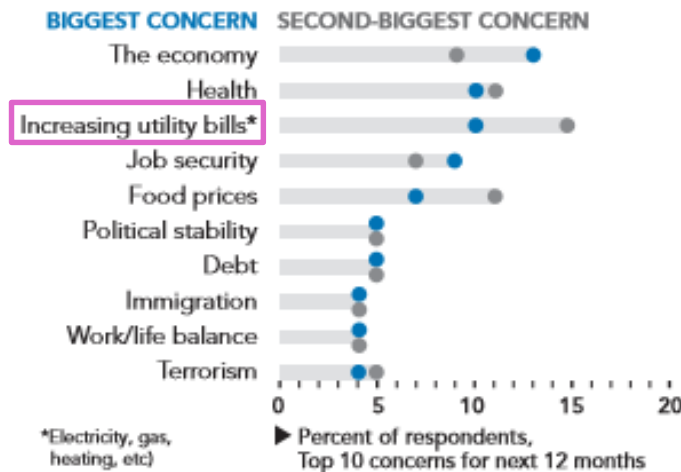
North America



Asia Pacific



Europe

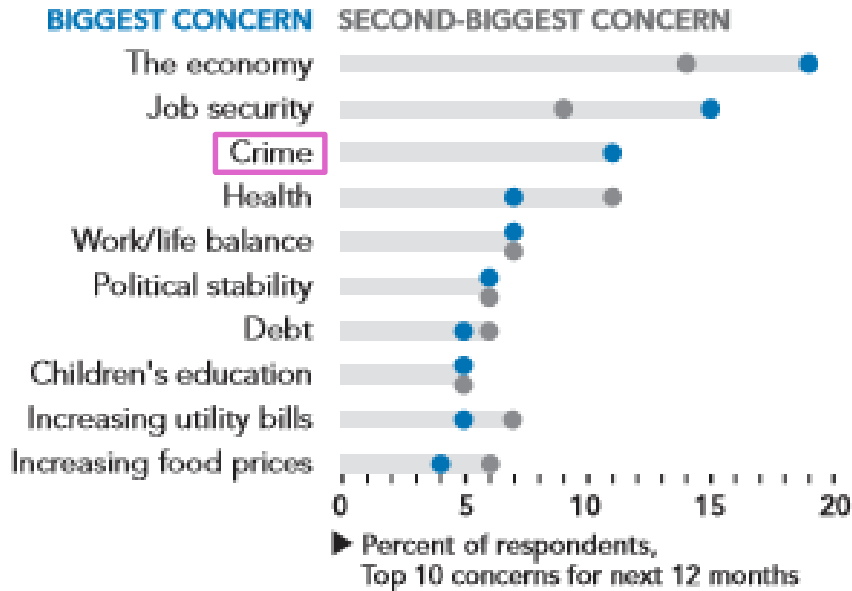


Source: The Conference Board Global Consumer Confidence Index, in collaboration with Nielsen, Q1 2019

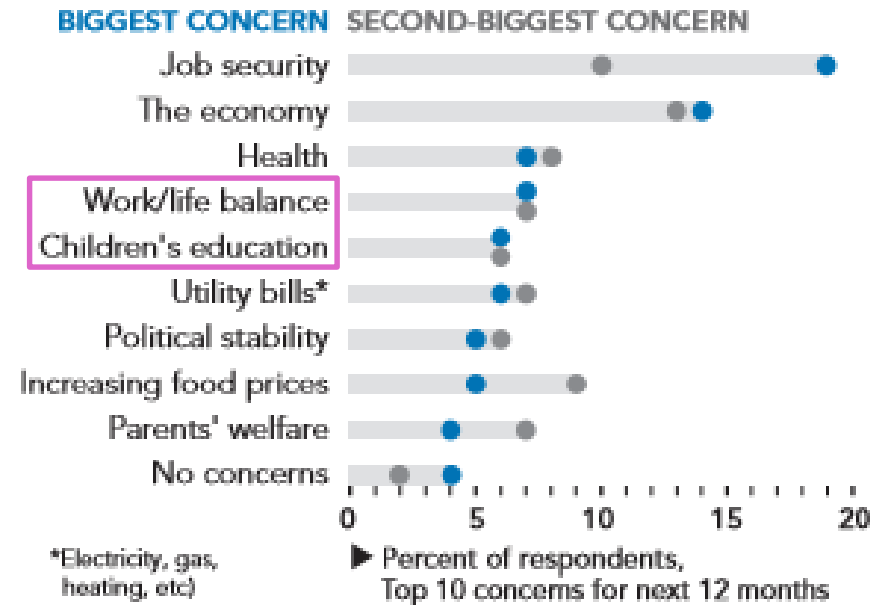


Consumers' concerns over next 12 months

Latin America



Middle East & Africa

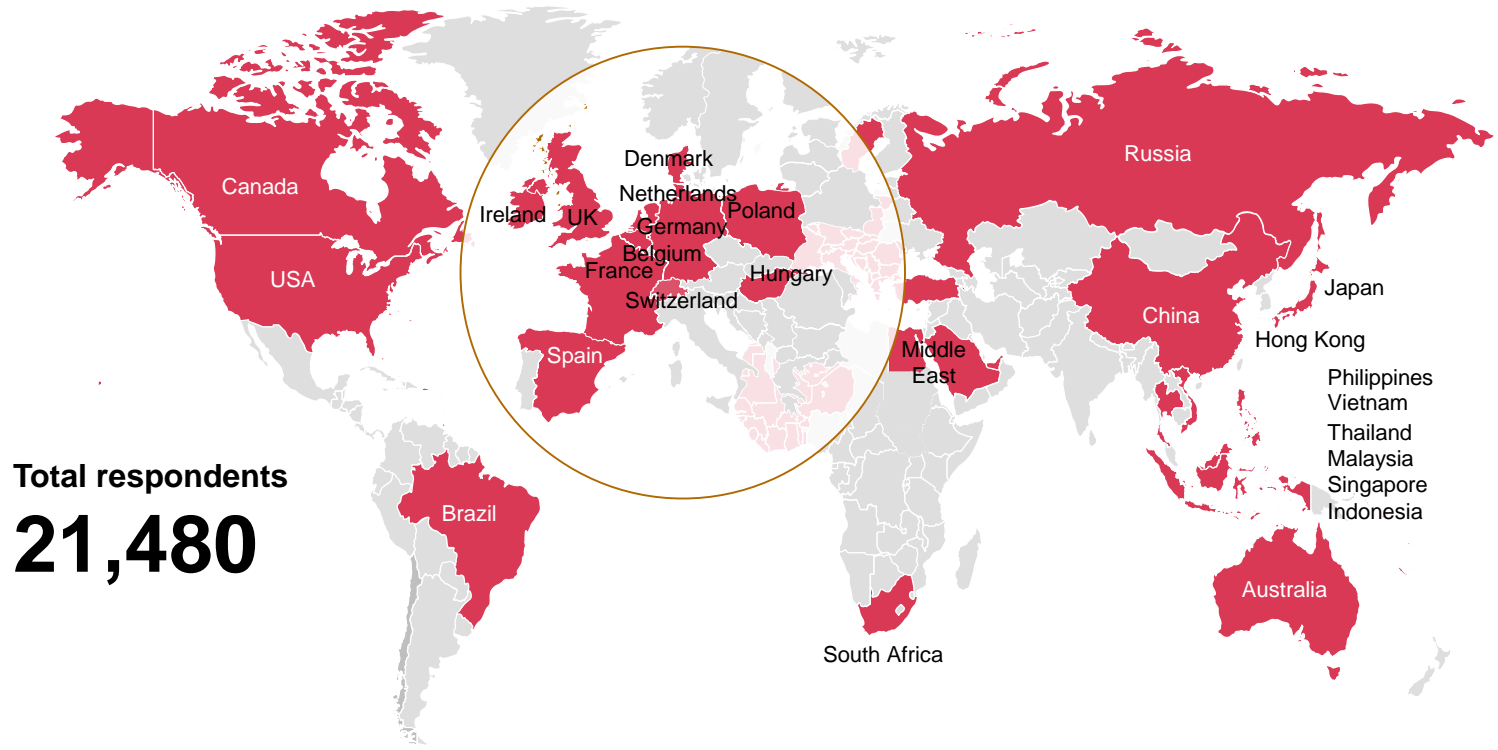


Source: The Conference Board Global Consumer Confidence Index, in collaboration with Nielsen, Q1 2019



Consumer Behavior Trends

PwC's Global Consumer Insights Survey: Consumer behaviour and activity across the world



Total respondents
21,480

Cross-industry consumer trends we're seeing

Mobile commerce is eclipsing desktop and tablet commerce

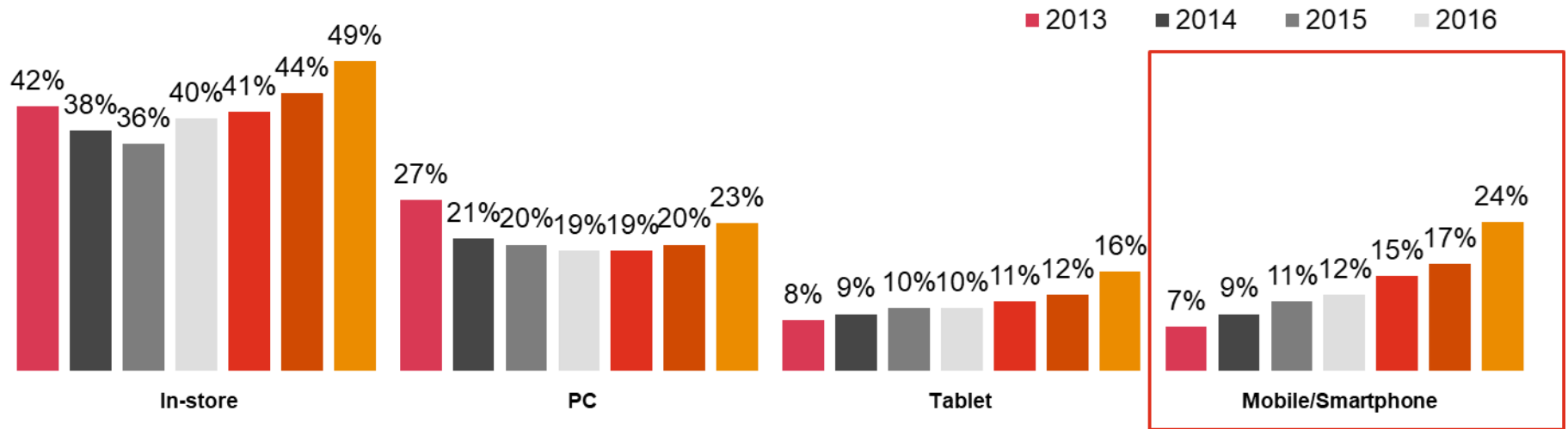
Voice is gaining adoption quickly

Many long-standing consumer habits are being reshaped through new technologies and online social interaction

While different markets are evolving at different speeds, many new consumer trends are global in nature, leapfrogging previous cultural and purchasing power constraints



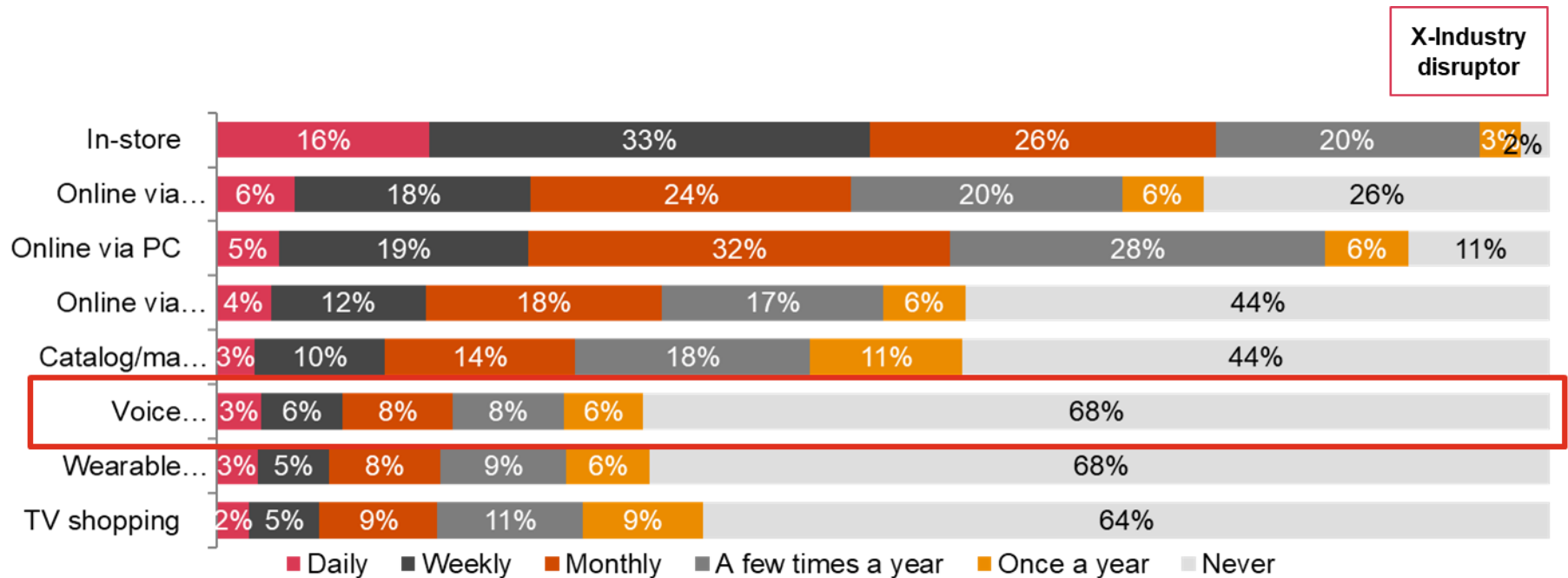
Mobile eclipsed desktop and tablet purchasing in 2019



Q7. How often do you buy **products** (e.g. clothes, books, electronics) using the following shopping channels? (Excluding grocery shopping) Note: Chart combines 'daily' and 'weekly' shopping

Base: 21,480

Almost one in ten consumers now shop daily or weekly using a smart voice assistant



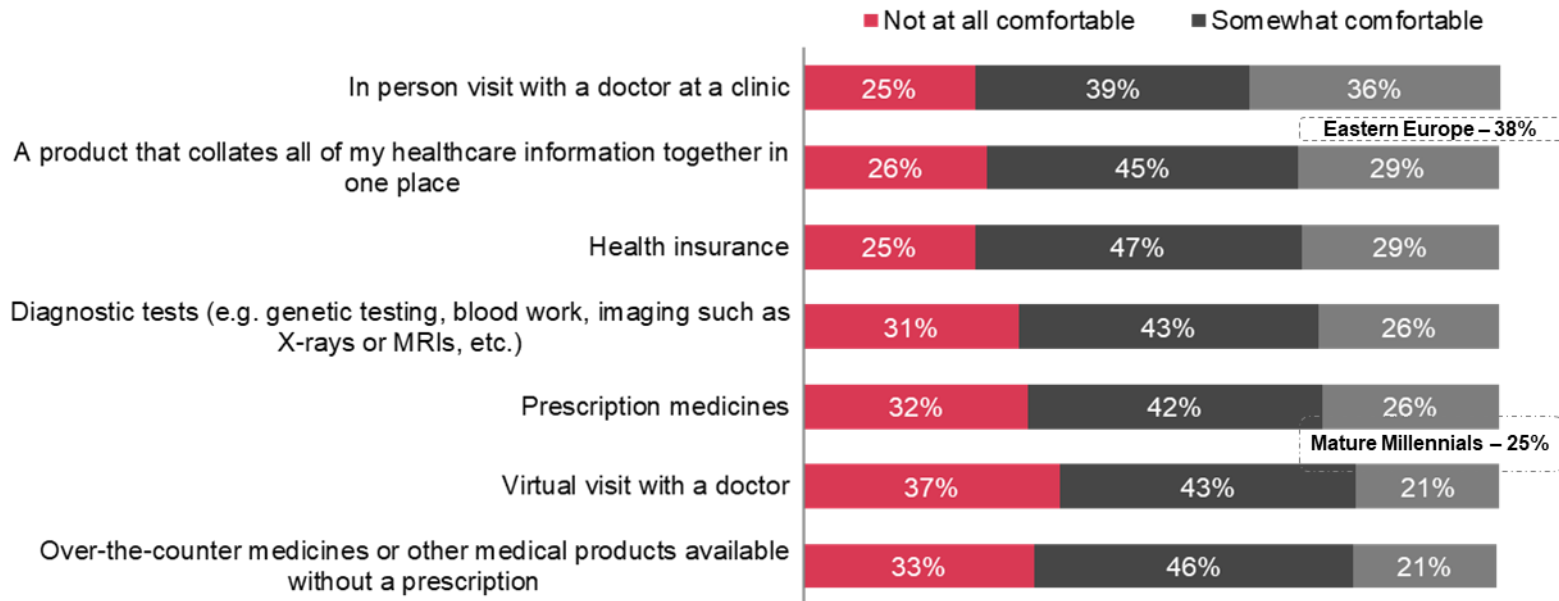
Q7. How often do you buy products (e.g. clothes, books, electronics) using the following shopping channels?

Base: 21,480

Audience Poll Question 2

Nearly two thirds of consumers are comfortable with the shift toward accessing healthcare in new ways

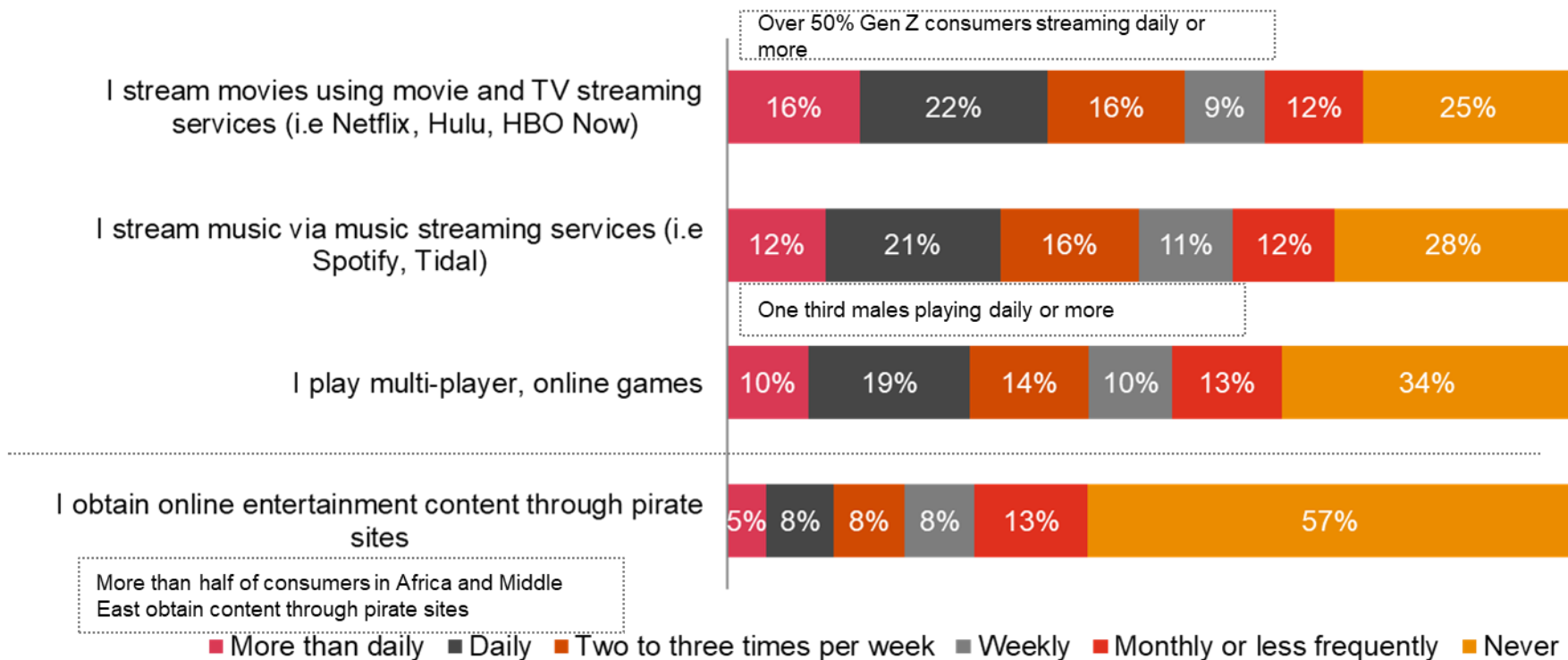
A number of non-traditional healthcare companies have announced plans to enter the healthcare market (e.g. Apple, Google, Microsoft, Facebook and Amazon)



Q31. To what extent would you feel comfortable accessing healthcare products or services from such companies?

Base: 21,480

Consumers are 'cutting the cord' when consuming entertainment with nearly 2 in 5 streaming daily or more



Q24. How often do you use the following online entertainment/streaming services?
Base: 21,480

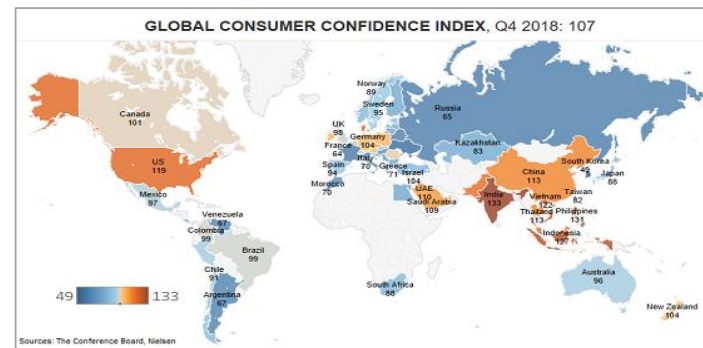
What's Ahead?

Global consumer surveys featured on this webcast

The Conference Board® Global Consumer Confidence Index:
<https://www.conference-board.org/data/bcicountry.cfm?cid=15>

Next release (Q2 2019):
July 3, 2019

PwC Global Consumer Insights Survey 2019
<https://www.pwc.com/gx/en/industries/consumer-markets/consumer-insights-survey.html>



Global Consumer Insights Survey 2019

It's time for a consumer-centred metric: introducing 'return on experience'

PwC's 10th annual Global Consumer Insights Survey (GCIS) — which gathers the sentiments of more than 21,000 online consumers in 27 territories — shows that in addition to the traditional return on investment (ROI) metrics used to determine a company's success, we need to introduce another metric, one with a laser focus on customer experience: return on experience. Whether your organisation is in the business of household goods, health services, selling cars or financial services, delivering a superior experience will be what makes you a winner.

The advertisement features a vertical orange bar on the left with the title and a quote. To the right is a close-up profile of a woman's face, looking thoughtful. The PwC logo is in the bottom right corner.



Related Resources from The Conference Board



Publication

The Conference Board Global Consumer Confidence Index
Next release (Q2 2019):
July 3, 2019



Webcasts

[A Look Ahead: Customers, Sustainability & Innovation](#)
June 27, 2019



[Using Metrics to Drive Better Outcomes for Innovation](#)
July 1, 2019



Event

[The Conference Board Excellence in Marketing & Communications Awards](#)
June 26, 2019



Related Research by The Conference Board

- **Research to be published this summer**

- ✓ Corporate Communications Practices: 2019 Edition
- ✓ Consumers' Perceptions about Companies' Sustainability Initiatives and Impact on Shopping Across the World
- ✓ Customer and Marketing Trends: Innovation, Use of New Digital Technologies, and Future Marketing Talent

For members of The Conference Board:

- Executive Brief: U.S. Spending Set to Increase for Rest of 2019—Despite First Quarter Wobble
 - ✓ <https://www.conference-board.org/publications/publicationdetail.cfm?publicationid=8500>

