



# THE MARCO SURVEY

POST COVID  
CONSUMER BEHAVIOUR II

„marco“



## MARCO RESEARCH:

### Post Covid Consumer Behaviour II

**The “MARCO Research: Post Covid Consumer Behaviour II” survey carried out by the leading global communication agency MARCO to track consumer trends in 14 key markets.**

Including the main European markets (UK, Germany, France, Italy, Spain and Portugal); key markets in Africa (Morocco, South Africa, Kenya and Ivory Coast) and Latin America (Mexico, Brazil, Colombia) and the USA.

The fieldwork was carried out from May to June 2022 with a total sample of 14,200 consumers using online methodology with representative permission marketing based sampling carried out by CINT.

## MARCO RESEARCH:

### Post Covid Consumer Behaviour II

**The first study ,“MARCO Research: Post Covid Consumer Behaviour”, was carried out in April and May of 2020 in six countries.**

This second edition includes eight more countries and broadened the scope of topics to include:

- The rise in the consumption of responsible brands,
- The consumption of media
- The rise of the metaverse
- The growth of e-commerce
- The use of cryptocurrencies
- The tourism sector and the current drivers



# THE RESULTS & MAIN CONCLUSIONS

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## **GLOBAL DATA**

## 7/ Have you ever bought something based on the recommendation of an influencer?

- Latin American and African countries are the most willing to buy products following an influencer's recommendations
- Spaniards and Italians are the least likely to buy a service or product based on a recommendation from an influencer
- Brazil and Kenya are the two countries where influencers have the most convincing power

Yes		
1	Kenya	84%
2	Brazil	73%
3	Morocco	67%
4	South Africa	65%
5	Mexico	56%
6	Colombia	51%
7	United States	45%

8	Cote d'Ivoire	42%
9	UK	41%
10	Portugal	40%
11	Germany	38%
12	France	31%
13	Spain	29%
14	Italy	21%

## 9/ Did you start buying more online since the COVID pandemic started?

- Respondents from Latin American countries are the most likely to have started shopping online in the wake of the pandemic
- More than half of the people interviewed in Côte d'Ivoire have not started buying more online in the wake of the pandemic
- Spain is the European country that has seen the smallest increase in the number of people shopping online after the pandemic

Yes		
1	Brazil	91%
2	Colombia	87%
3	Mexico	84%
4	UK	76%
5	Italy	72%
6	Portugal	69%
7	Morocco	69%

8	Germany	69%
9	United States	66%
10	France	61%
11	South Africa	60%
12	Kenya	58%
13	Spain	57%
14	Cote d'Ivoire	42%

## 11/ Which of the following products do you buy online more than in a physical store?

- Of the countries surveyed, Colombians are more likely to buy their trips online than in physical shops
- 6 out of 10 Spaniards buy their travel tickets on the internet
- Moroccans and Ivorians are the least likely to book their trips online

Travel		
1	Colombia	65%
2	South Africa	65%
3	UK	60%
4	Brazil	60%
5	Portugal	60%
6	Spain	59%
7	Italy	59%

8	Kenya	52%
9	Mexico	52%
10	Germany	49%
11	France	44%
12	United States	40%
13	Morocco	37%
14	Cote d'Ivoire	24%

## 11/ Which of the following products do you buy online more than in a physical store?

- Respondents from Latin American countries are the most likely to buy their clothes online
- Most Americans prefer to buy clothes in physical shops, rather than through e-commerce
- The Spanish are the Europeans who buy their clothes online the least

Clothing & fashion		
1	Brazil	67%
2	Mexico	64%
3	Colombia	63%
4	South Africa	63%
5	UK	63%
6	Germany	57%
7	Kenya	56%

8	Cote d'Ivoire	54%
9	Portugal	53%
10	Italy	47%
11	France	47%
12	Morocco	46%
13	United States	44%
14	Spain	41%



## 11/ Which of the following products do you buy online more than in a physical store?

- Respondents from Latin American countries and UK are the most likely to buy their show tickets online
- Kenyans are the most likely to buy their show tickets online in Africa
- The French are the Europeans who buy their show tickets online the least

Show tickets		
1	Brazil	59%
2	UK	58%
3	Colombia	56%
4	Mexico	55%
5	Portugal	55%
6	Kenya	54%
7	Germany	50%

8	Spain	52%
9	Italy	52%
10	France	42%
11	United States	37%
12	Morocco	32%
13	South Africa	31%
14	Cote d'Ivoire	28%

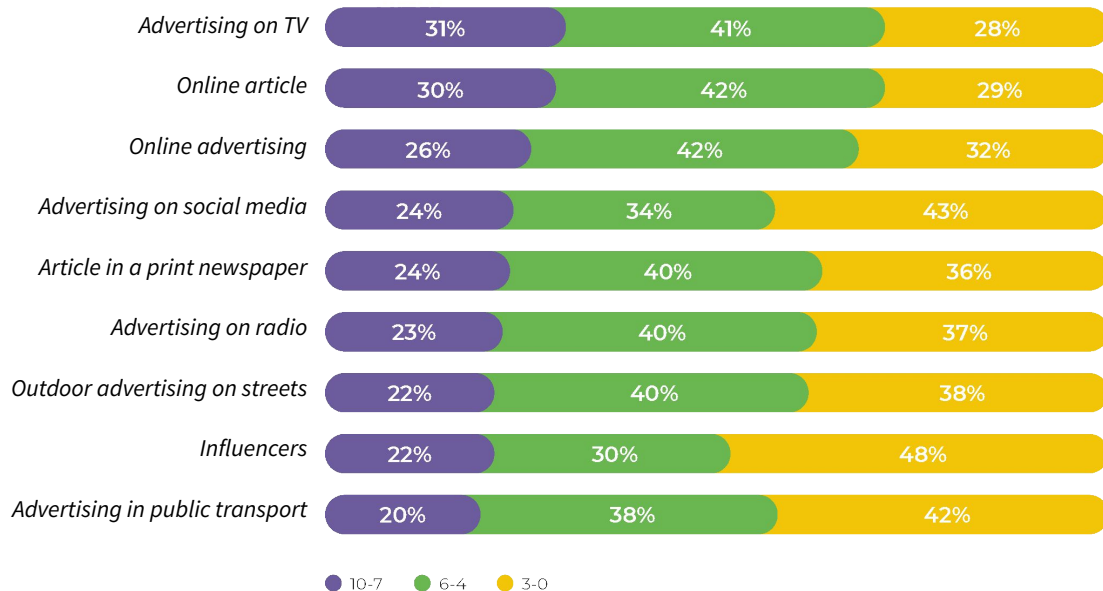
# THE RESULTS & MAIN CONCLUSIONS

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## **EUROPEAN DATA**

## 6/ What makes you choose one product or brand instead of another?

- TV commercials are the channels that most influence European consumers to choose one brand over another
- Public transport advertisements are the least influential marketing actions for consumers in Europe
- Influencers are the second-least popular choice among European consumers



## 7/ Have you ever bought something based on the recommendation of an influencer?

- There is a significant generation gap with influencer recommendations. More than half of Generation Z have bought a product based on the recommendation of an influencer. This percentage drops to 13% when we talk about seniors
- European women are more likely to buy a product following the recommendation of influencers than men



● Yes    ● No



## 9/ Did you start buying more online since the Covid-19 pandemic started?

- People with higher incomes are the most reported to have bought more online after the pandemic
- Once again, Generation Z buy more online than they did before the pandemic, with 3 out of 4 shopping online.



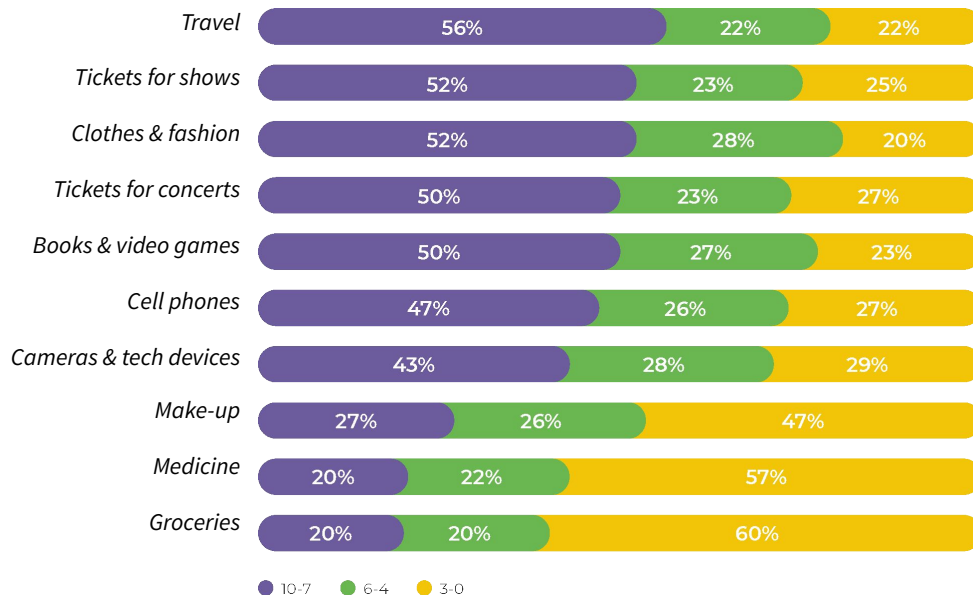
● Yes ● No

## THE RESULTS & MAIN CONCLUSIONS

### European data

## 11/ Which of the following products do you buy online more than in a physical store?

- Travel tickets are the most popular products for Europeans to buy online, while groceries are the least popular
- The product that women buy the most online is clothing
- The product millennials buy most online is tickets for shows



# THE RESULTS & MAIN CONCLUSIONS

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## **GERMANY DATA**

## 7/ Have you ever bought something based on the recommendation of an influencer?

- German women are more likely to buy a product on the recommendation of influencers than men
- There is a significant generation gap with influencer recommendations. More than half of Generation Z (71%) have bought a product on the recommendation of an influencer. This percentage drops to 17% when it comes to older generations



● Yes ● No



## 9/ Did you start buying more online since the Covid-19 pandemic started?

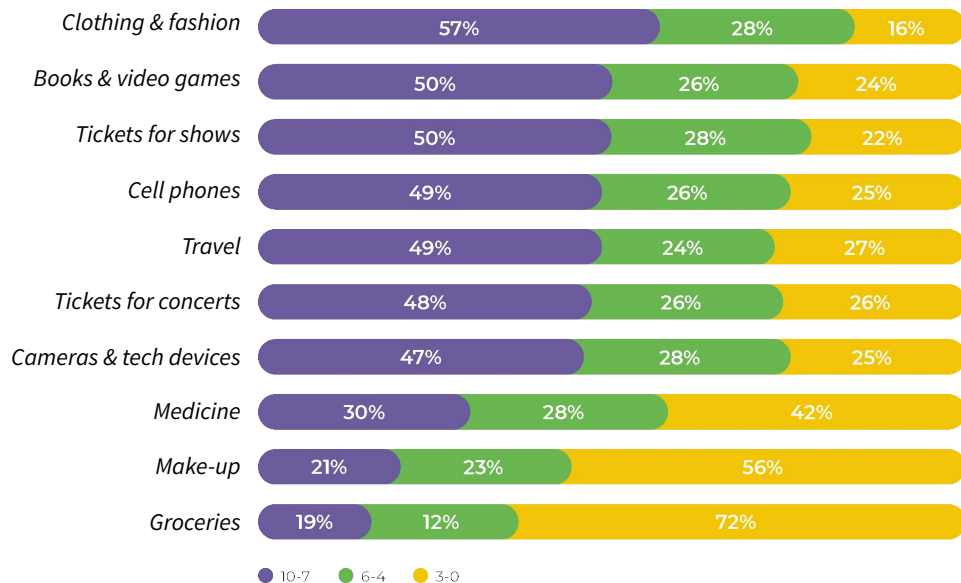
- Generation X is the generation least likely to buy more online now than before the pandemic
- With respect to the rest of the filters, there are no major differences. Both men and women buy more online now than before the pandemic



● Yes ● No

## 11/ Which of the following products do you buy online more than in a physical store?

- Clothing & fashion is the most popular category of products for Germans to buy online, while groceries are the least popular
- Generation Z's most popular shopping item in Germany is clothing, while seniors are more likely to buy trips online



# THE RESULTS & MAIN CONCLUSIONS

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## **UK DATA**

## 7/ Have you ever bought something based on the recommendation of an influencer?

- British women are more likely to buy products on the recommendation of influencers than men
- More than half of millennials say they have bought something on the recommendation of an influencer. In contrast, only 15% of seniors say they have



● Yes ● No



## 9/ Did you start buying more online since the Covid-19 pandemic started?

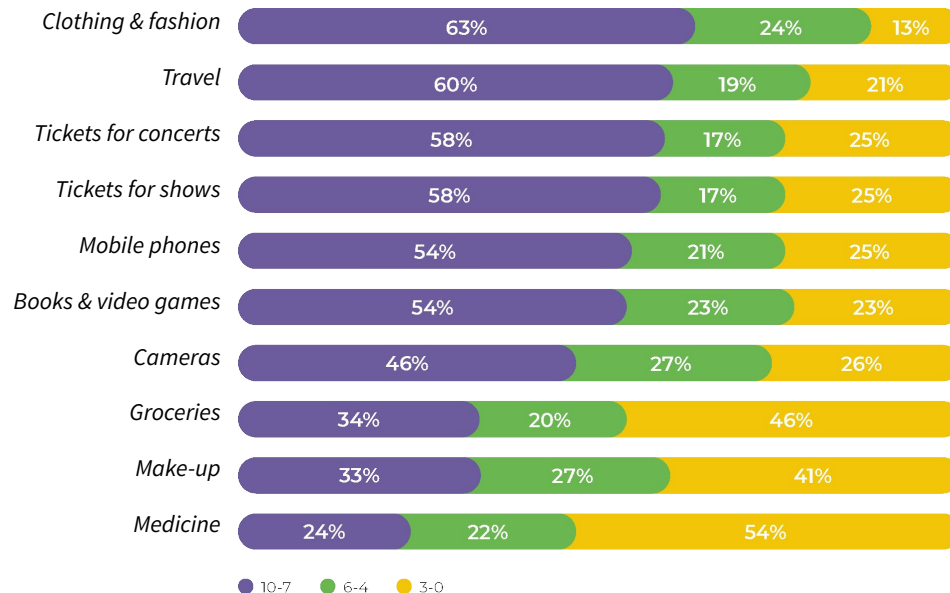
- Contrary to other age segments, 85% of seniors say they have not started shopping more online after the pandemic
- Women have started to buy online more than men since the pandemic



● Yes ● No

## 11/ Which of the following products do you buy online more than in a physical store?

- Clothing & fashion is the most popular category of products for British people to buy online, while medicines are the least popular
- The most popular products for British men to buy online are books and video games, while for women, it's clothes & fashion
- The most popular online shopping item for the British middle class is tickets for concerts & events



# THE RESULTS & MAIN CONCLUSIONS

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## **ITALY DATA**

## 9/ Did you start buying more online since the Covid-19 pandemic started?

- Italian women started shopping online more than men since the pandemic started
- People in southern Italy began shopping online more than people in northern Italy, since the pandemic started



● Si ● No

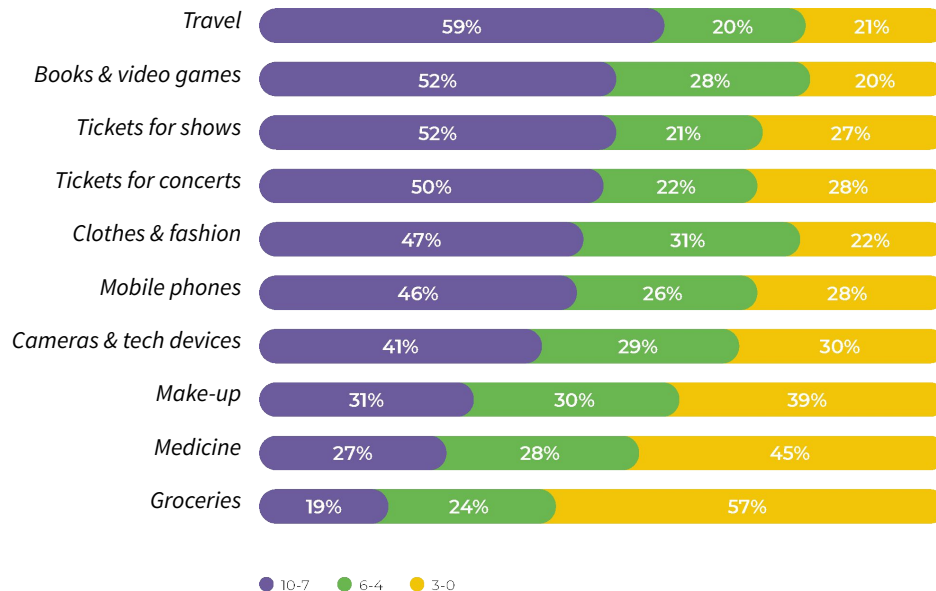


## THE RESULTS & MAIN CONCLUSIONS

### Italy data

## 11/ Which of the following products do you buy online more than in a physical store?

- Travel tickets are the most popular products for Italian people to buy online, while groceries and medicine are the least popular
- The products that Italian women buy the most online are clothes & fashion
- The most popular products for Italian seniors to buy online are also clothes & fashion



## 12/ Do you buy more second-hand products than before Covid-19?

- Italian women started buying more second-hand products than men since the pandemic started
- Since the pandemic started, Gen Z Italians have started to buy more second-hand products than other age groups



● Si    ● No

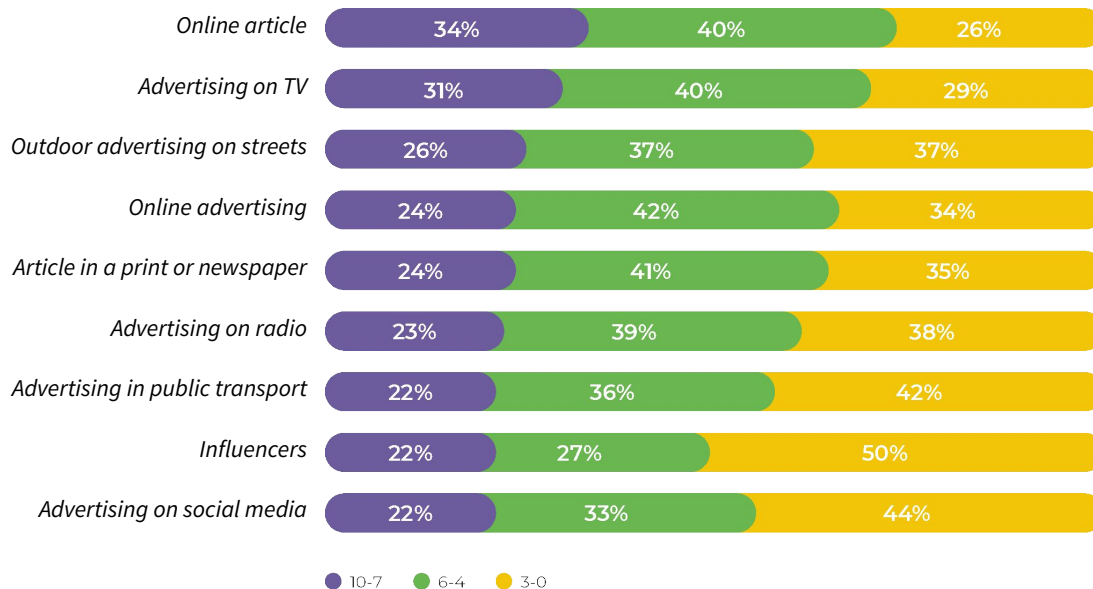
# THE RESULTS & MAIN CONCLUSIONS

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## **FRANCE DATA**

## 6/ What makes you choose one product or brand instead of another?

- Online articles are the channels that most influence French consumers to choose one brand over another
- High-income people say that they are most influenced by outdoor advertisements when choosing one product over another



## 7/ Have you ever bought something based on the recommendation of an influencer?

- Unlike in other European countries, French men buy more products based on the recommendation of an influencer than women
- No French seniors have ever bought a product on the recommendation of an influencer



● Yes ● No



## 9/ Did you start buying more online since the Covid-19 pandemic started?

- 1 in 4 Generation Z respondents say they have started shopping online more now than before the pandemic
- Only 38% of seniors have started shopping online more now than before the pandemic



● Yes ● No

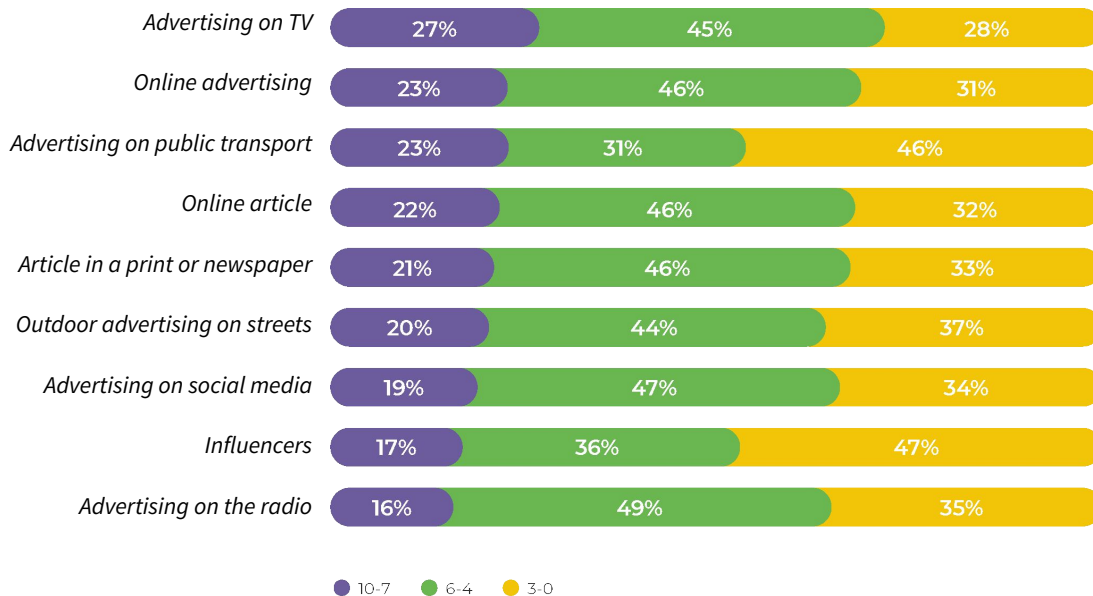
# THE RESULTS & MAIN CONCLUSIONS

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## **SPAIN DATA**

## 6/ What makes you choose one product or brand instead of another?

- Commercials on TV are the channels that most influence Spanish consumers to choose one brand over another
- Generation Z people say that ads on social media such as Instagram or Facebook are the most influential to them when it comes to choosing one brand over another



## 9/ Did you start buying more online since the Covid-19 pandemic started?

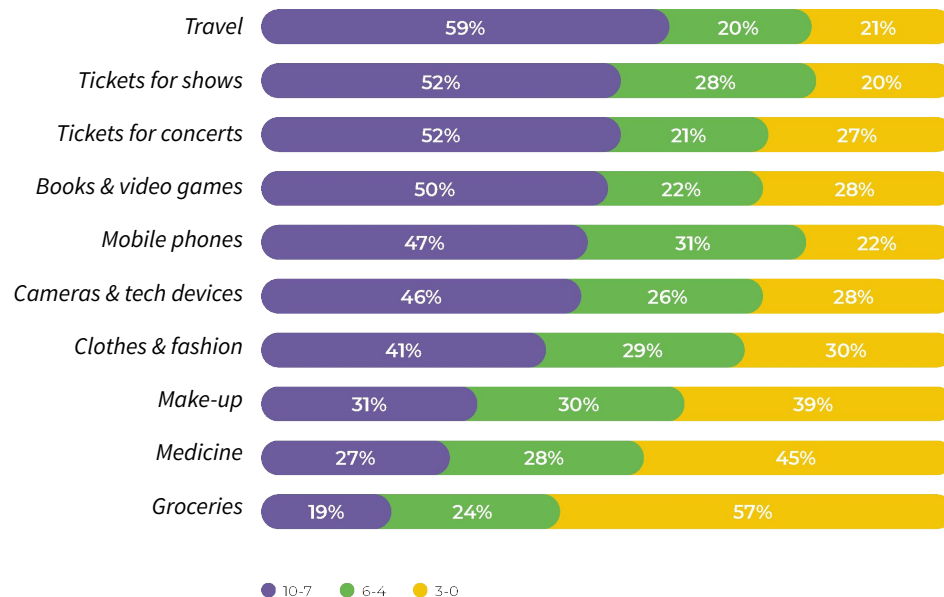
- Only 45% of Spanish seniors have started shopping online more now than before the pandemic
- 57% of Spaniards buy more now online than before COVID



● Sí ● No

## 11/ Which of the following products do you buy online more than in a physical store?

- Travel tickets are the most popular products for Spanish people to buy online, while groceries and medicine are the least popular
- The most popular products for the Gen Z to buy online are books and video games





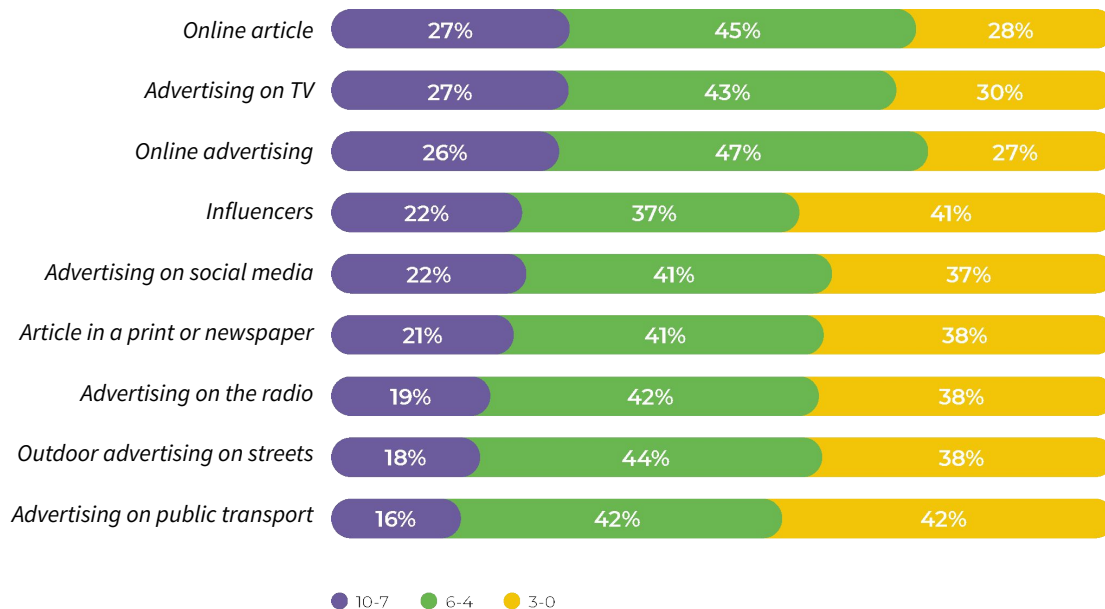
# THE RESULTS & MAIN CONCLUSIONS

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## **PORTUGAL DATA**

## 6/ What makes you choose one product or brand instead of another?

- Online articles are the channels that most influence Portuguese consumers to choose one brand over another
- Public transport advertisements are the least influential marketing actions for consumers in Portugal



## 9/ Did you start buying more online since the Covid-19 pandemic started?

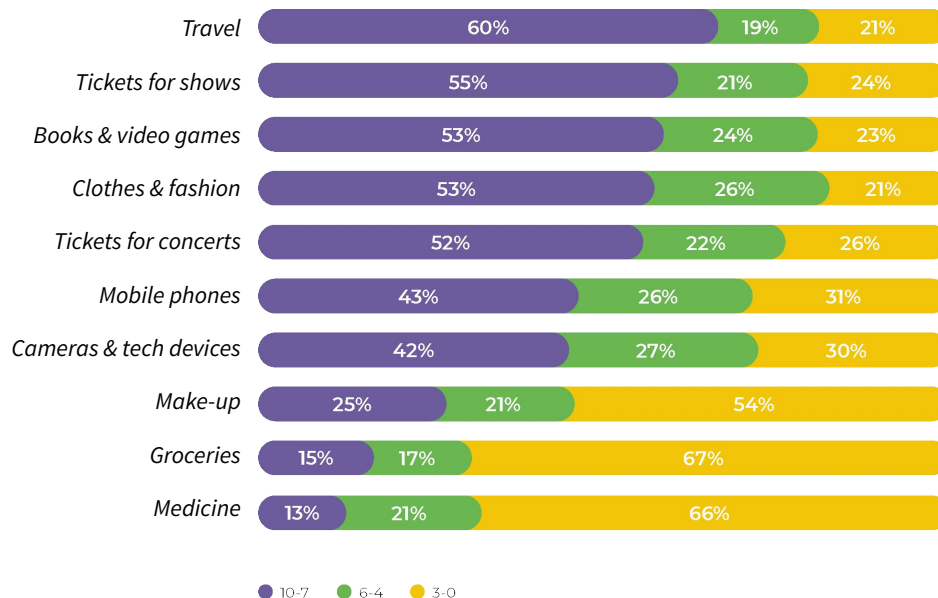
- Only 30% of seniors have started shopping online more now than before the pandemic
- Millennials are the biggest online shoppers in the post-pandemic period



● Yes ● No

## 11/ Which of the following products do you buy online more than in a physical store?

- Travel tickets are the most popular products for Portuguese people to buy online, while groceries and medicine are the least popular
- The most popular category of products women buy online are clothes & fashion





# THE RESULTS & MAIN CONCLUSIONS

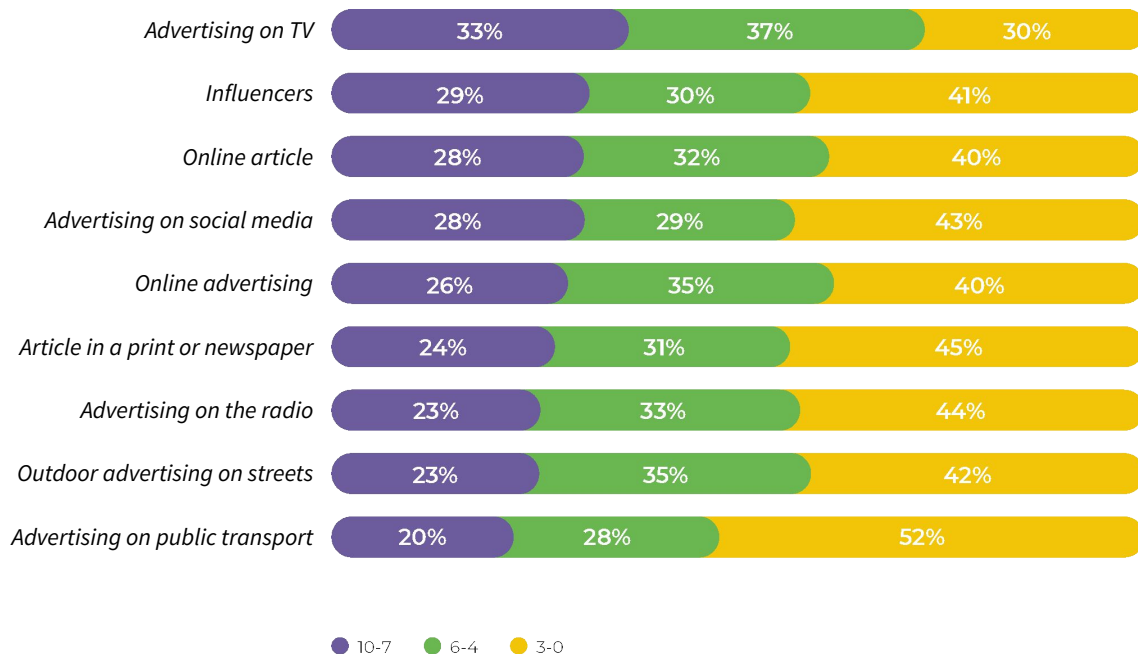
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## **US DATA**



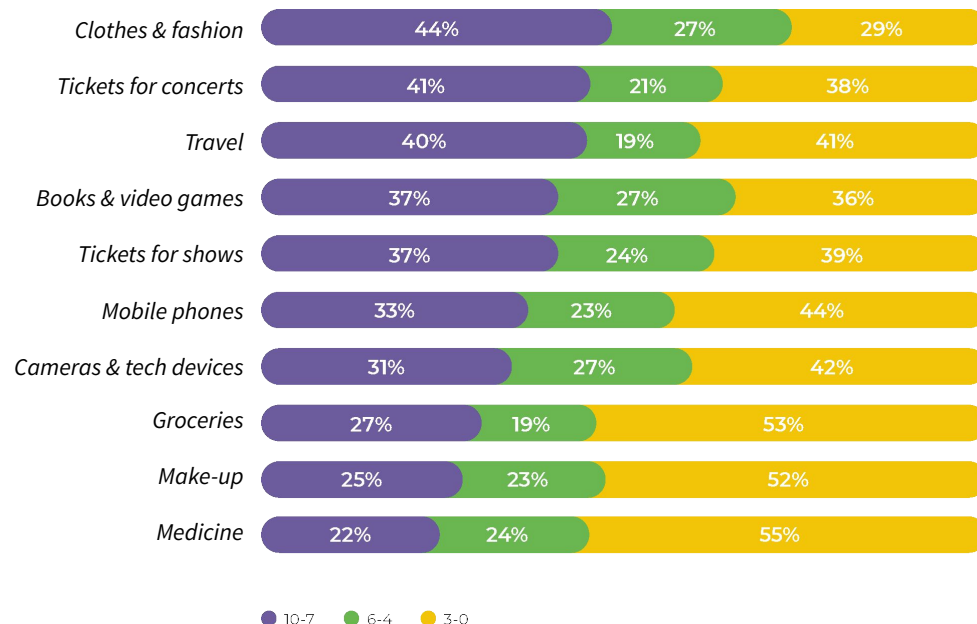
## 6/ What makes you choose one product or brand instead of another?

- Commercials on TV are the channels that most influence North Americans consumers to choose one brand over another
- Generation Z people say that recommendations from influencers are the most influential to them when it comes to choosing one brand over another



## 11/ Which of the following products do you buy online more than in a physical store?

- Clothes & fashion is the most popular category of products for American people to buy online, while medicine and make-up are the least popular
- The products that seniors buy most online are cameras and tech devices



# THE RESULTS & MAIN CONCLUSIONS

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## **MAGHREB DATA**

## 8/ Do you feel comfortable giving out personal data in exchange for something free?

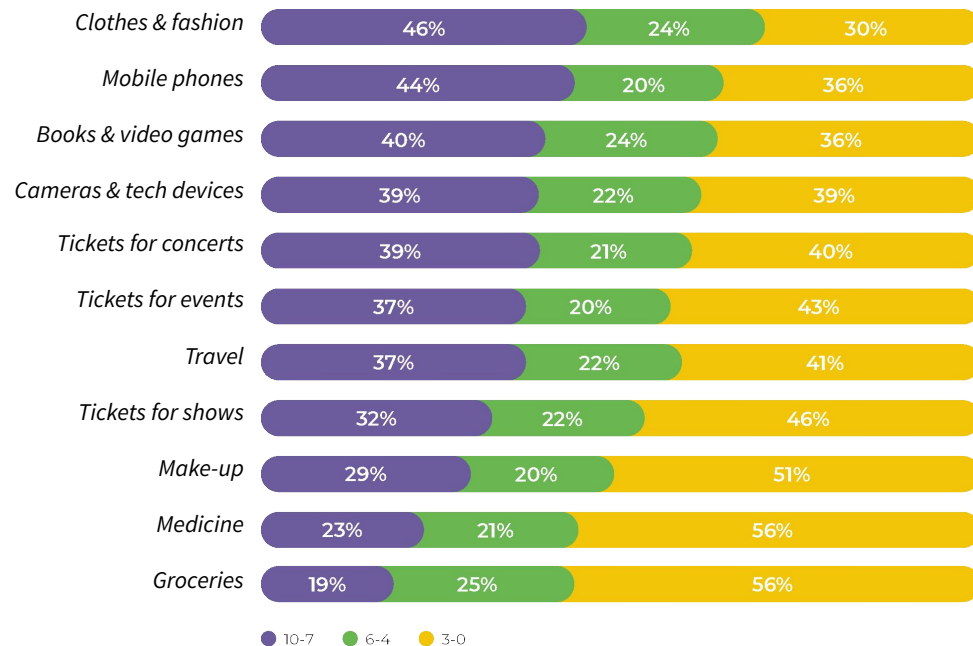
- 3 out of 5 Moroccans feel comfortable sharing their personal data in exchange for something for free
- People with lower incomes are more willing to give their personal data in exchange for something for free than those with higher incomes



● Yes ● No

## 11/ Which of the following products do you buy online more than in a physical store?

- Clothes & fashion is the most popular category of products for Moroccan people to buy online, while medicine and groceries are the least popular
- In Morocco, most products are still purchased in physical shops rather than in e-commerce





THE RESULTS & MAIN CONCLUSIONS

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## **SUB-SAHARAN AFRICA DATA**

## 9/ Did you start buying more online since the Covid-19 pandemic started?

- Millennials have been the generation that has started to shop more online following the pandemic
- People with the lowest incomes are the least likely to buy online after the pandemic



● Yes ● No

## 12/ Do you buy more second-hand products than before Covid-19?

- People on low incomes are the biggest buyers of second-hand goods after the pandemic
- Men buy more second-hand goods after the pandemic than women do



● Yes ● No



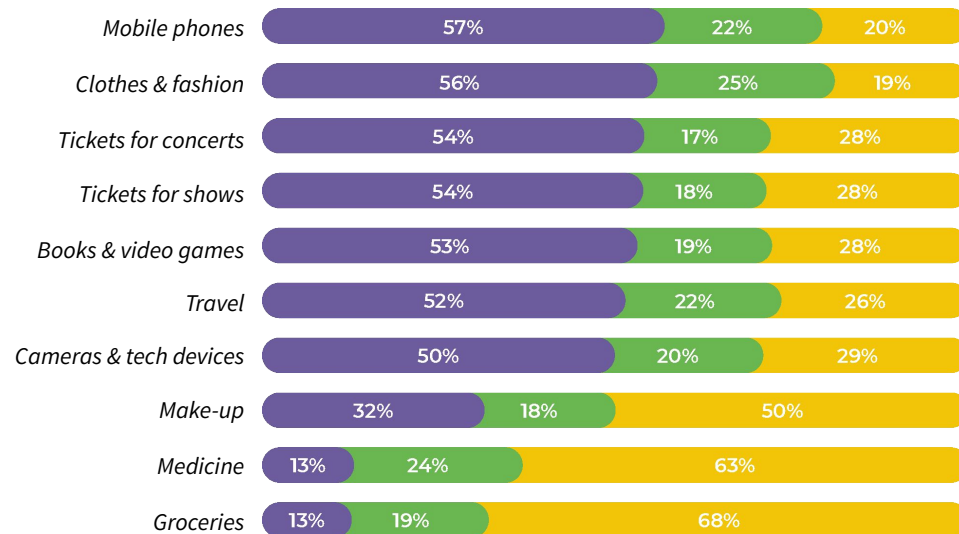
# THE RESULTS & MAIN CONCLUSIONS

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## **KENYA DATA**

## 11/ Which of the following products do you buy online more than in a physical store?

- Mobile phones are the most popular products for Kenyan people to buy online, while medicine and groceries are the least popular
- Kenyan women's top online purchases are clothes & fashion





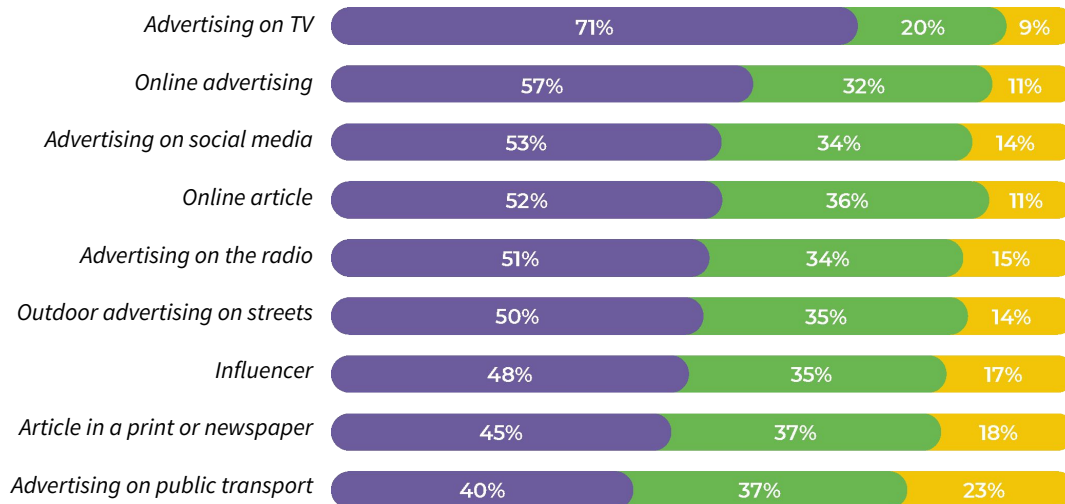
# THE RESULTS & MAIN CONCLUSIONS

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## **SOUTH AFRICA DATA**

## 6/ What makes you choose one product or brand instead of another?

- Commercials on TV are the channels that most influence South African consumers to choose one brand over another
- There are no major differences by age, gender or income when it comes to which marketing technique most influences South Africans to choose one brand over another





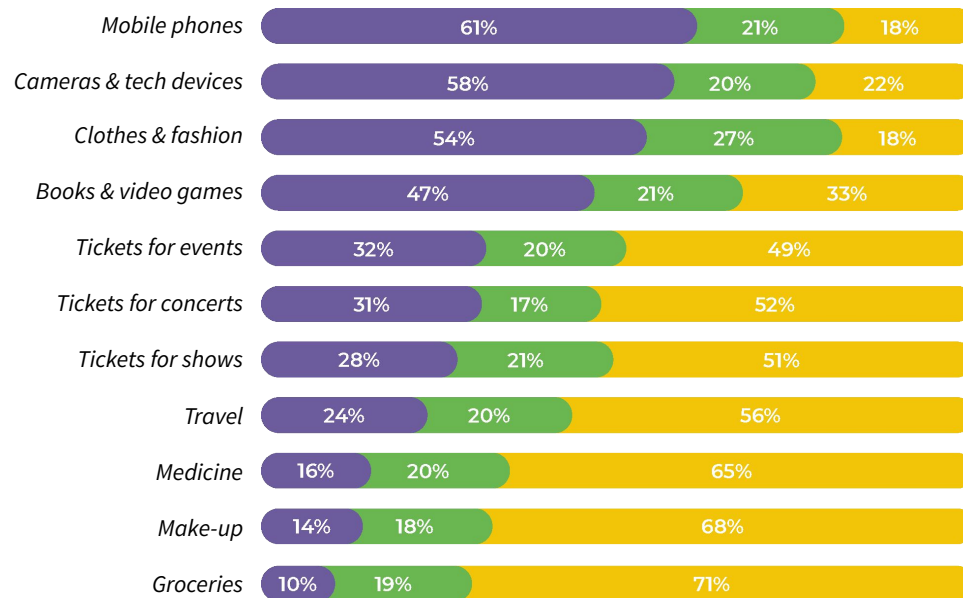
# THE RESULTS & MAIN CONCLUSIONS

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## **IVORY COAST DATA**

## 11/ Which of the following products do you buy online more than in a physical store?

- Mobile phones are the most popular products for Ivorian people to buy online, while make-up and groceries are the least popular
- The products that women buy most online are clothes & fashion





# THE RESULTS & MAIN CONCLUSIONS

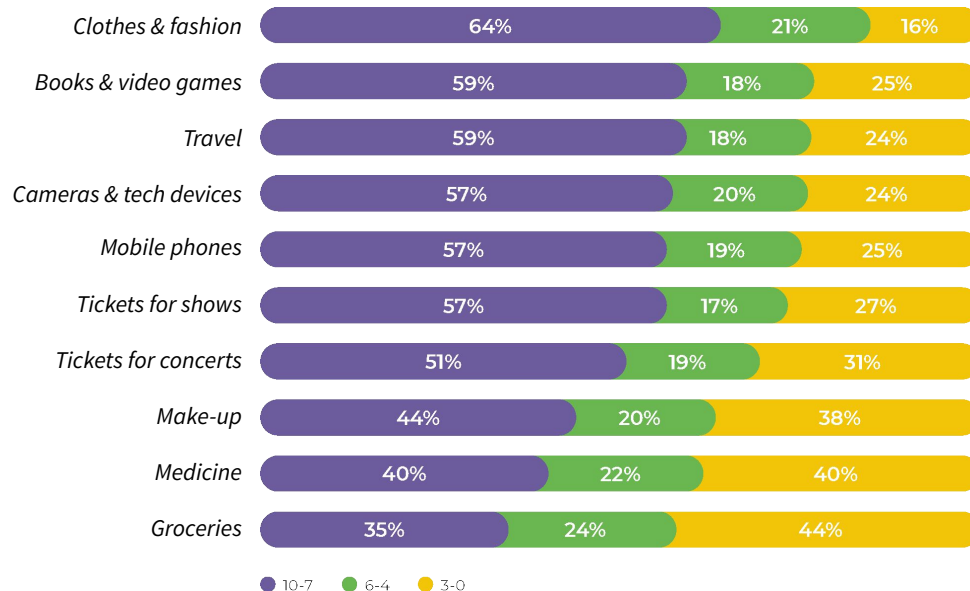
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## **LATAM DATA**



## 11/ Which of the following products do you buy online more than in a physical store?

- Clothes & fashion are the most popular products for Latin American people to buy online, while medicine and groceries are the least popular
- The products that men buy most online are books & video games



## 12/ Do you buy more second-hand products than before Covid-19?

- Generation Z is most willing to buy second-hand goods after the pandemic
- The Latin American middle class is the most willing to buy second-hand goods after the pandemic



● Yes ● No

# THE RESULTS & MAIN CONCLUSIONS

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## **BRAZIL DATA**

**Brazil data**

## 7/ Have you ever bought something based on the recommendation of an influencer?

- Brazilian women buy more products on the recommendation of an influencer than men do
- 9 out of 10 Brazilians under the age of 25 say they have bought a product based on the recommendation of an influencer



● Yes ● No

**Brazil data**

## 8/ Do you feel comfortable sharing personal data in return for something free?

- Brazilian men are more comfortable than women in sharing their personal data in exchange for a free product
- Generation Z are the most comfortable sharing their personal data in exchange for a free product

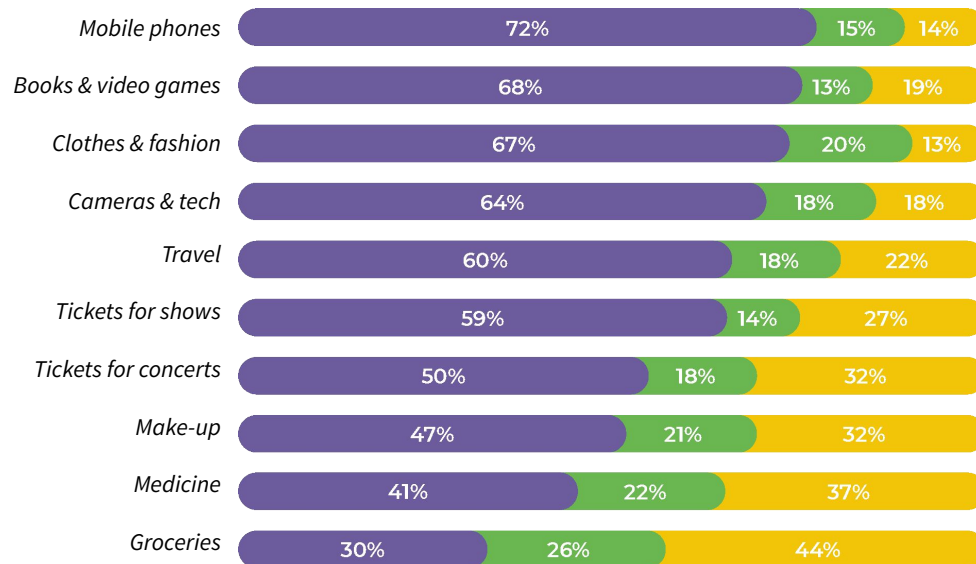


● Yes ● No



## 11/ Which of the following products do you buy online more than in a physical store?

- Mobile phones are the most popular products for Brazilian people to buy online, while medicine and groceries are the least popular
- The products that millennials buy most online are books & video games



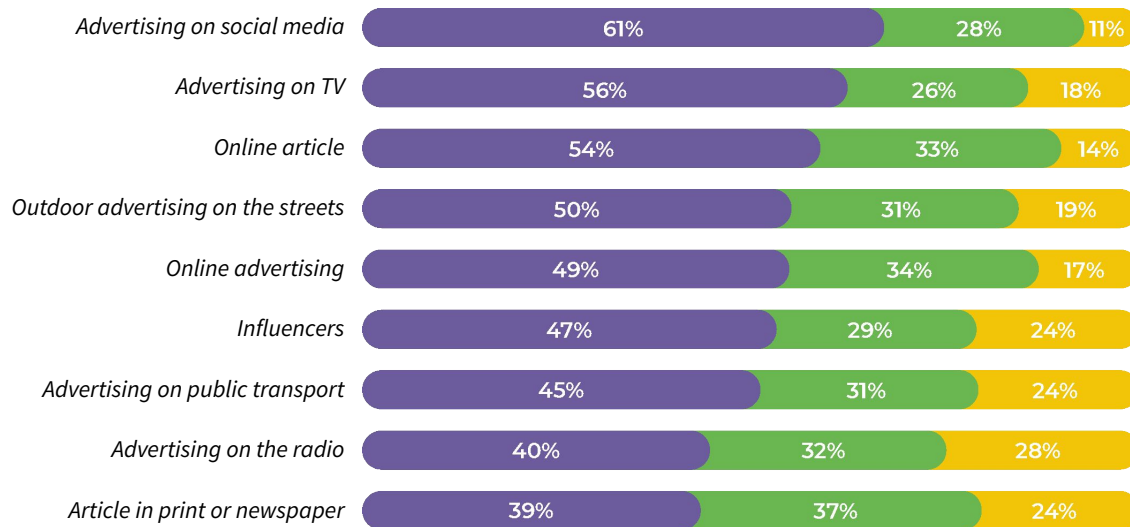
# THE RESULTS & MAIN CONCLUSIONS

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## **MEXICO DATA**

## 6/ What makes you choose one product or brand instead of another?

- Advertising on social media are the channels that most influence Mexican consumers to choose one brand over another
- Advertisements in the more conventional media (radio and print media) are the ones that least influence Mexicans when it comes to choosing one brand over another



## 7/ Have you ever bought something based on the recommendation of an influencer?

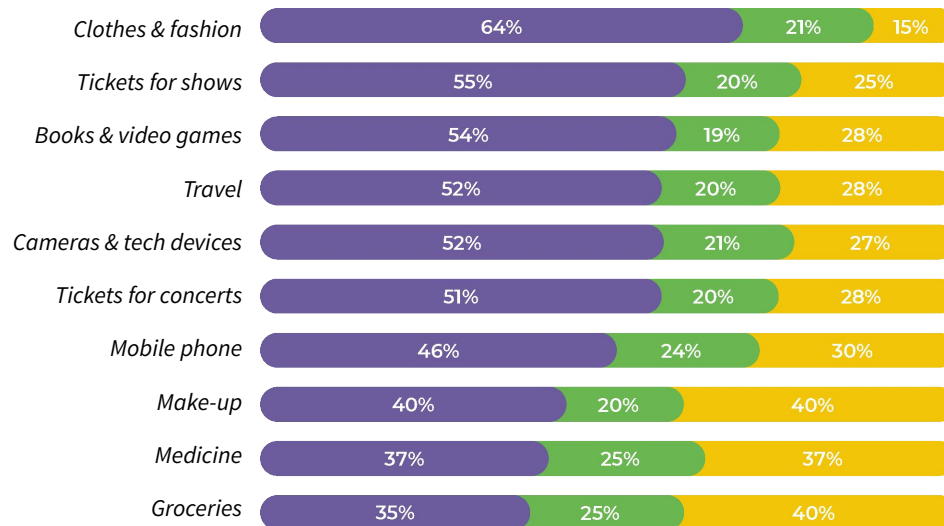
- 68% of Generation Z have at some point purchased a product on the recommendation of an influencer
- Mexican women are more likely to have bought a product on the recommendation of an influencer than men



● Yes ● No

## 11/ Which of the following products do you buy online more than in a physical store?

- Clothes & fashion are the most popular products for Mexican people to buy online, while medicine and groceries are the least popular
- Tickets for shows and books & video games complete the podium of products that Mexicans buy more online than in a physical shop





# THE RESULTS & MAIN CONCLUSIONS

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## **COLOMBIA DATA**

## 7/ Have you ever bought something based on the recommendation of an influencer?

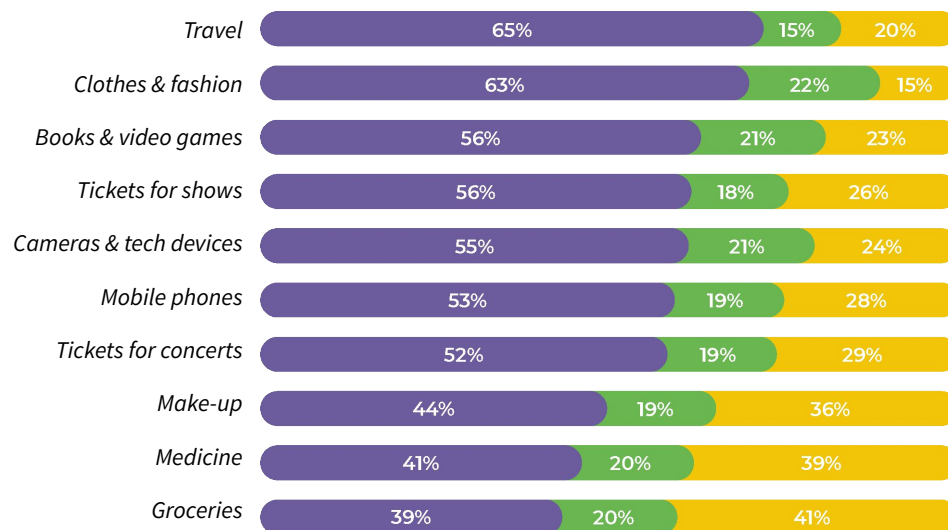
- Colombian women are more likely to have bought a product on the recommendation of an influencer than men
- 61% of Generation Z have at some point purchased a product on the recommendation of an influencer



● Yes ● No

## 11/ Which of the following products do you buy online more than in a physical store?

- Travel tickets are the most popular products for Colombian people to buy online, while medicine and groceries are the least popular
- The products that Mexican women buy most online than in a physical store are clothes & fashion



## 12/ Do you buy more second-hand products than before Covid-19?

- Mexican women are more willing than men to buy second-hand goods after the pandemic
- Generation Z is more willing than other age groups to buy second-hand goods after the pandemic



● Yes ● No





marco<sup>1</sup>