

# Impacts of COVID-19 on consumer behavior

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April 2020

Haier Europe

CANDY



Haier

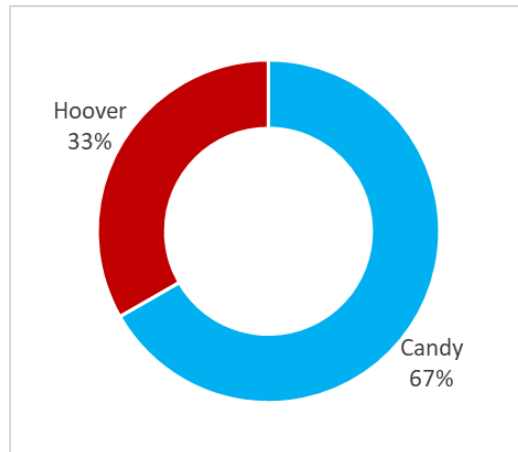
# Perimeter of analysis



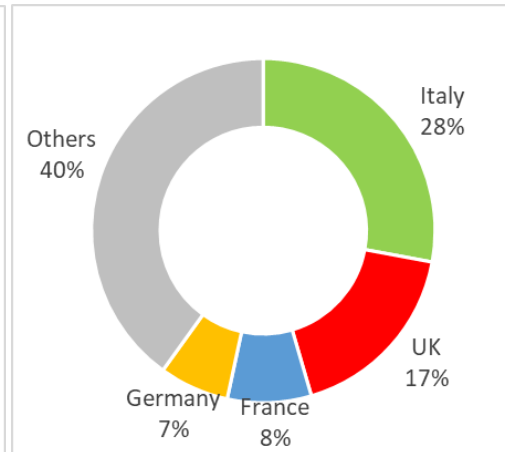
## Washing Machines

Sample size:  
~65.000

By Brand



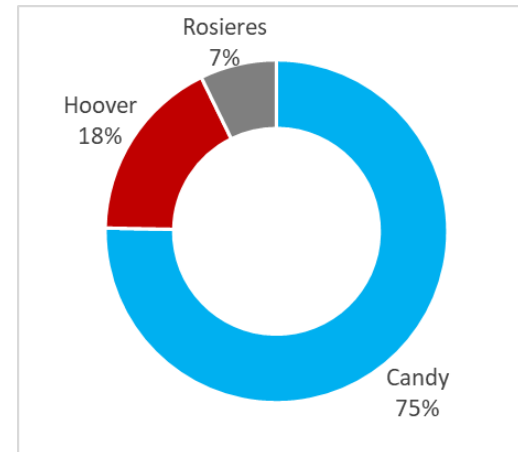
By Country



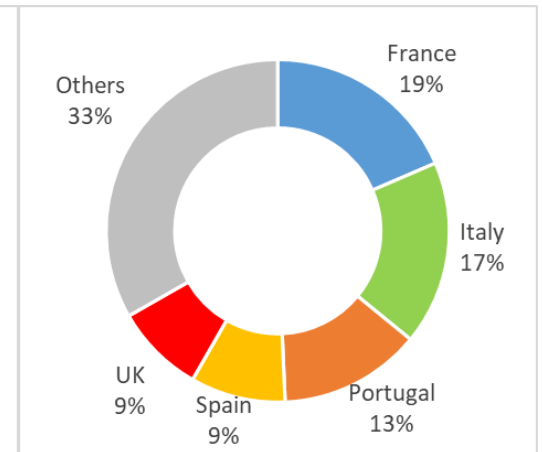
## Dishwashers

Sample size:  
~7.500

By Brand

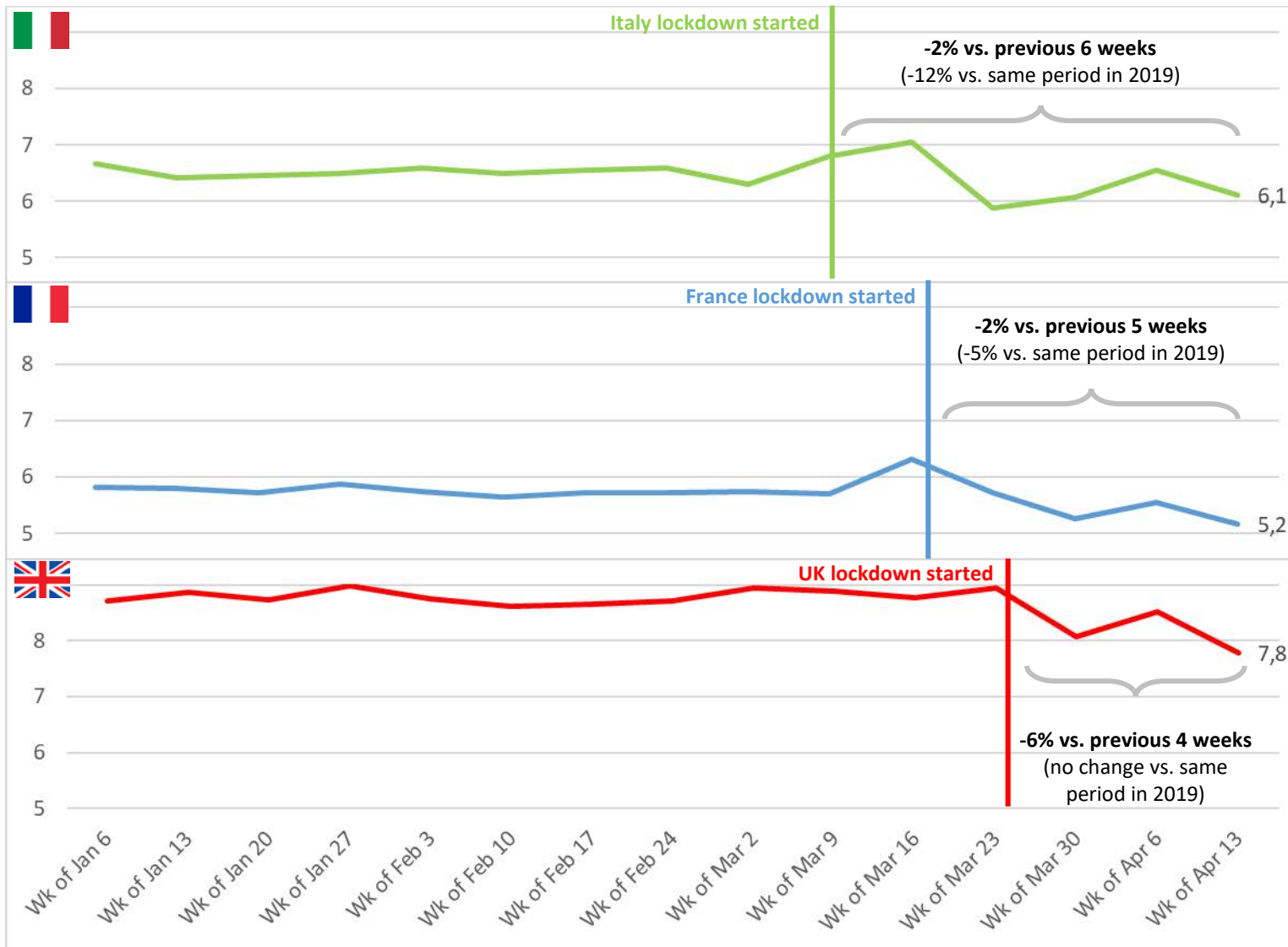


By Country





# Washing Machine weekly usage frequency



- Data shown refers to the **average number of programs** launched **per week** in 2020.
- One week before official lockdown dates we saw a **small increase** in frequency, which then **gradually subsided** and is now **lower than before**.
- **Across all countries** (not just the ones shown), the **overall drop in frequency** after March 9 was **-1%** vs. the previous 6 weeks (**+1%** vs. the same period in 2019).

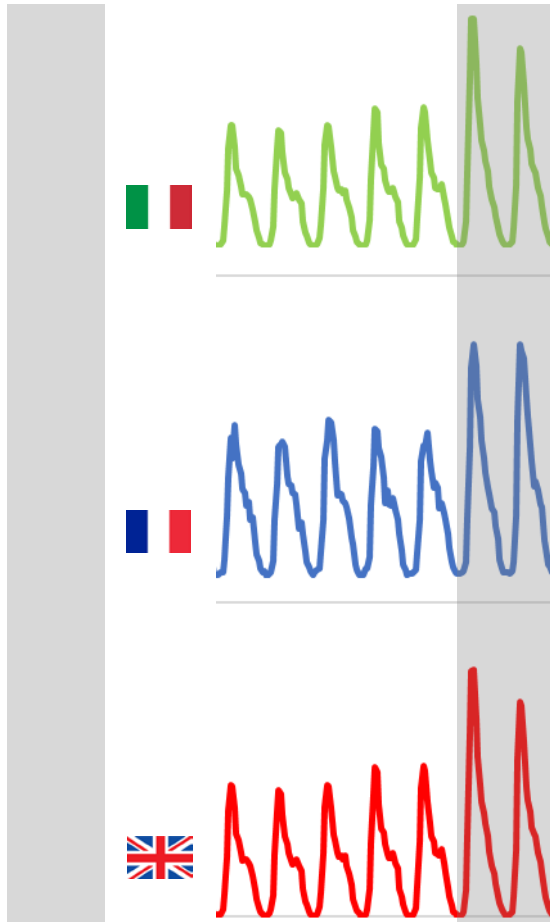


# Washing Machine usage distribution (2/2)

**March 2 to  
March 8**  
(same pattern as  
previous months)

VS.

**March 30 to  
April 5**  
(all countries in  
lockdown >1 week)



## Daily distribution

- Over the past few years, laundry activities have always been pretty **spread out during daytime**, with mild, comparable peaks in the morning and evening.
- Since people stay home all day long during lockdown, the **morning peak** has become extremely marked.

## Weekly distribution

- Laundry can be easily **deferred to the weekend**: this is evident in the habitual pattern, with the tallest spike on Sunday mornings.
- During lockdown this behavior did not shift much, but the busiest times were Saturday mornings.
- There was no Sunday spike on Easter (Apr 12), followed by a very busy Easter Monday: even though a long weekend may mean less during lockdown, **behaviors still adapted to the festivities**.

## Local patterns

- **France** was always the country with the **tallest evening spikes**, which **disappeared** completely during lockdown.
- In **Italy and France**, behaviors shifted noticeably **after** the announcement of countrywide lockdowns, while in the **UK** the shift **predated** the official lockdown by about two weeks.

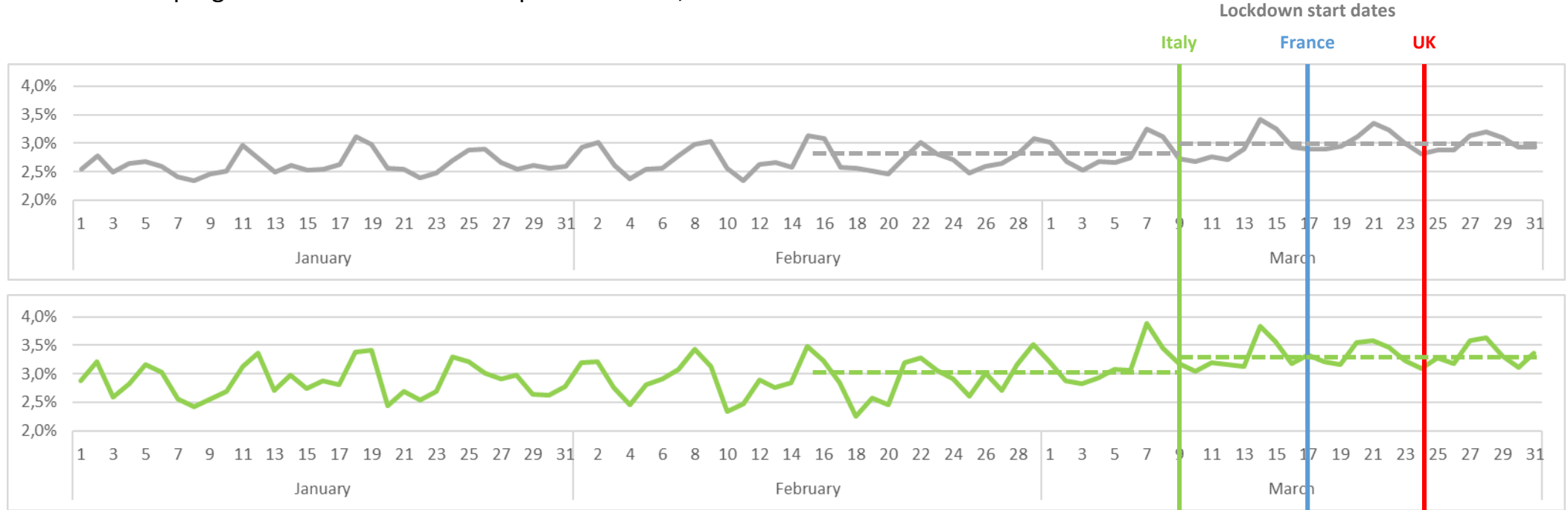


# Steam Option usage (Q1 2020 only)

Share of total launched programs which had a steam option selected, Q1 2020

  
All  
countries

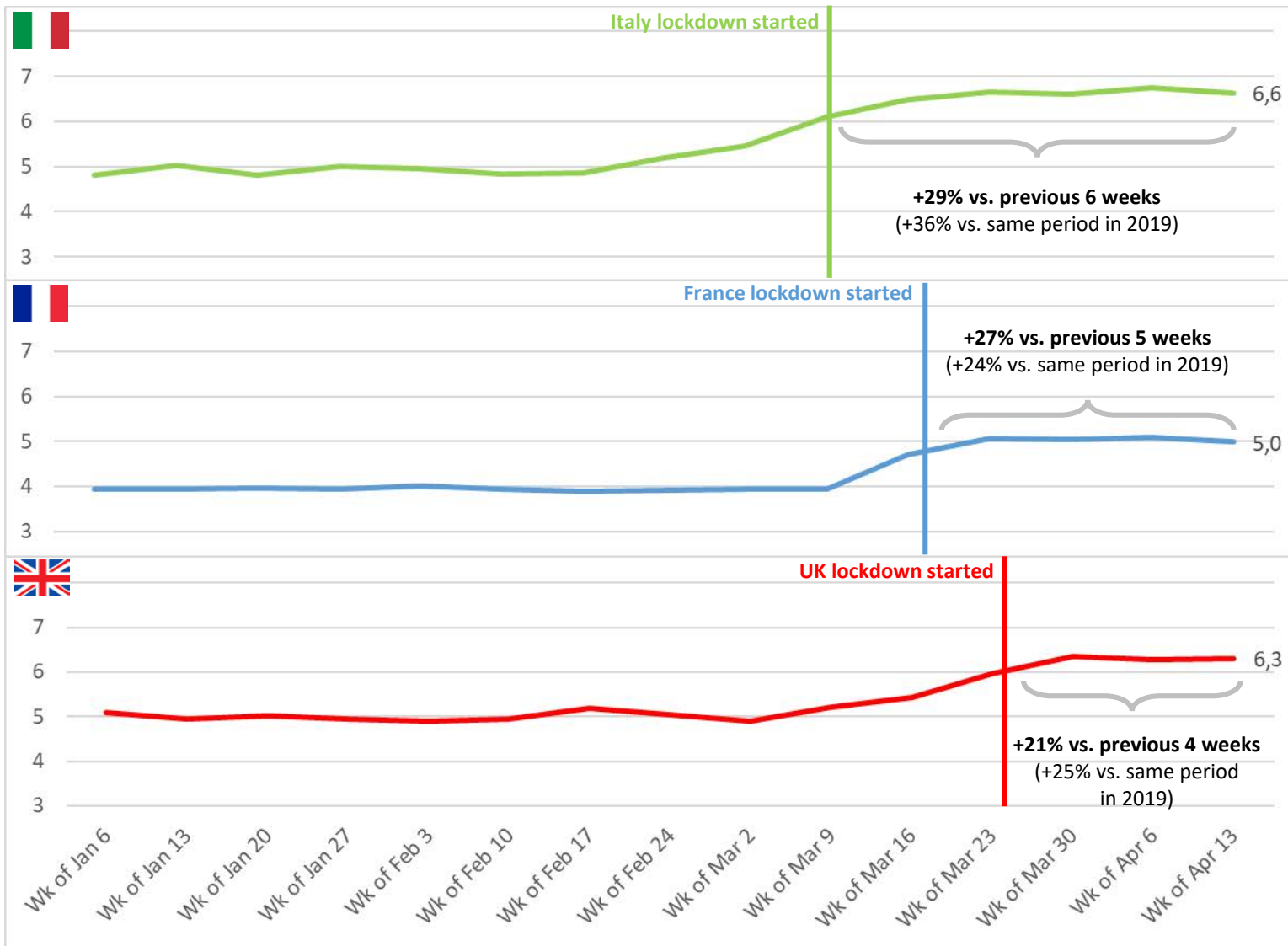
  
Italy



- One **hypothesis** to check is whether virus concerns drive consumers to **sanitize their laundry more often**, by selecting dedicated washing options such as **steam**.
- We can see that the share of programs launched with a steam option oscillates around a stable trend. In March, the **average steam share increased slightly** (especially in Italy, even before the lockdown).
- Therefore, **some consumers** appear to be **using steam more often in reaction to the virus**, but the spikes are not particularly marked, and it looks like they already started to fade in the last week of March.



# Dishwasher weekly usage frequency



- Data shown refers to the **average number of programs** launched **per week** in 2020.
- Dishwasher **usage frequency increased significantly** compared to recent months, plateauing at higher levels.
- The shift in frequency **predated the official lockdowns by a few weeks** in all countries.
- **Across all countries** (not just the ones shown), the **overall increase in frequency** after March 9 was **+24%** vs. the previous 6 weeks (+16% vs. the same period in 2019).

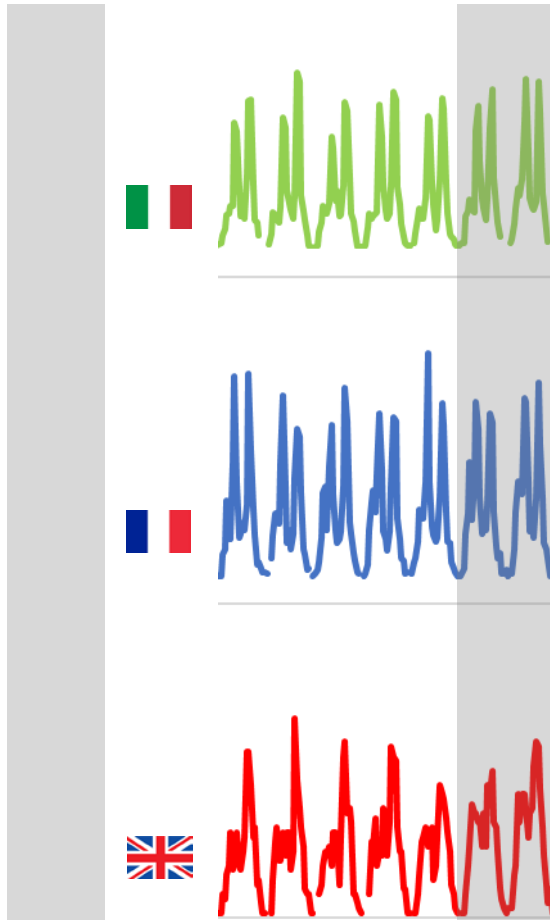


# Dishwasher usage distribution (2/2)

**March 2 to  
March 8**  
(same pattern as  
previous months)

VS.

**March 30 to  
April 5**  
(all countries in  
lockdown >1 week)



## Daily distribution

- The most significant usage spikes used to be **after dinnertime**, with the exception of weekends.
- During lockdown **lunchtime usage quickly increased**, due to most meals being consumed at home.

## Weekly distribution

- Weekend volumes were always very close to those of weekdays: **dishwashing is much less deferrable** than laundry.
- Aside from a **significant increase in overall volumes**, the pattern did not really evolve during the lockdown.
- The effects of the Easter long weekend are much less marked.

## Local patterns

- In **France** during lockdown, **lunchtime peaks** consistently **equaled** (and at times even **surpassed**) dinnertime ones.
- In the **UK**, the **lunchtime peak** was **never particularly marked**, and proportions did not change during lockdown (warning: relatively small sample).