



UBS Evidence Lab

# Staying at home?

See the impact across grocery shopping, work-from-home apps, telemedicine, and more

September 25, 2020



## Home Spotlights

A collection from new and recently updated studies from UBS Evidence Lab.

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# Buying a home?

Impact on the real estate market



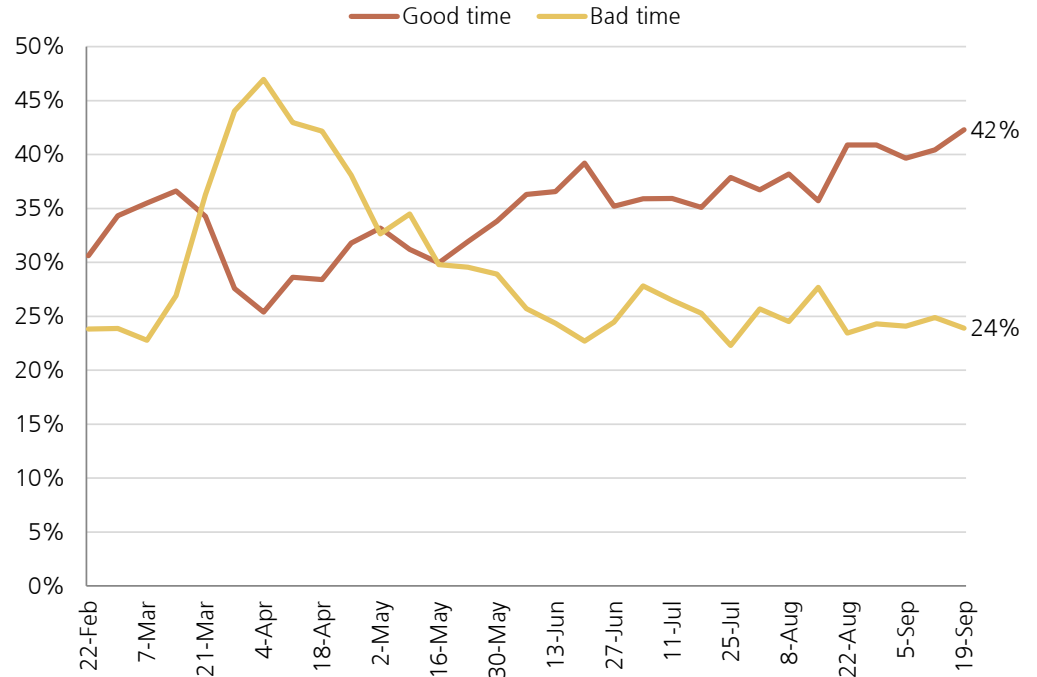
## Real Estate

### What do US consumers think about the housing market?

UBS Evidence Lab leverages data from a survey of 5-10K US consumers per week on housing, the economy, and other COVID-19-related issues.

- In the latest survey, 42% of respondents said now is a good time to buy a home, up from 36% a month ago.
- The percentage who believe it is a bad time to buy is 24%, similar to previous weeks.

**US Consumers: Is Now a Good or Bad Time to Purchase a New Home?**



Source: UBS Evidence Lab, Civic Science

Note: The question asked was "Given the current state of your local market, is now a good or bad time to purchase a new home?"  
 Chart excludes those who answered "about average".

# Dining at home?

Global consumer behaviors and preferences

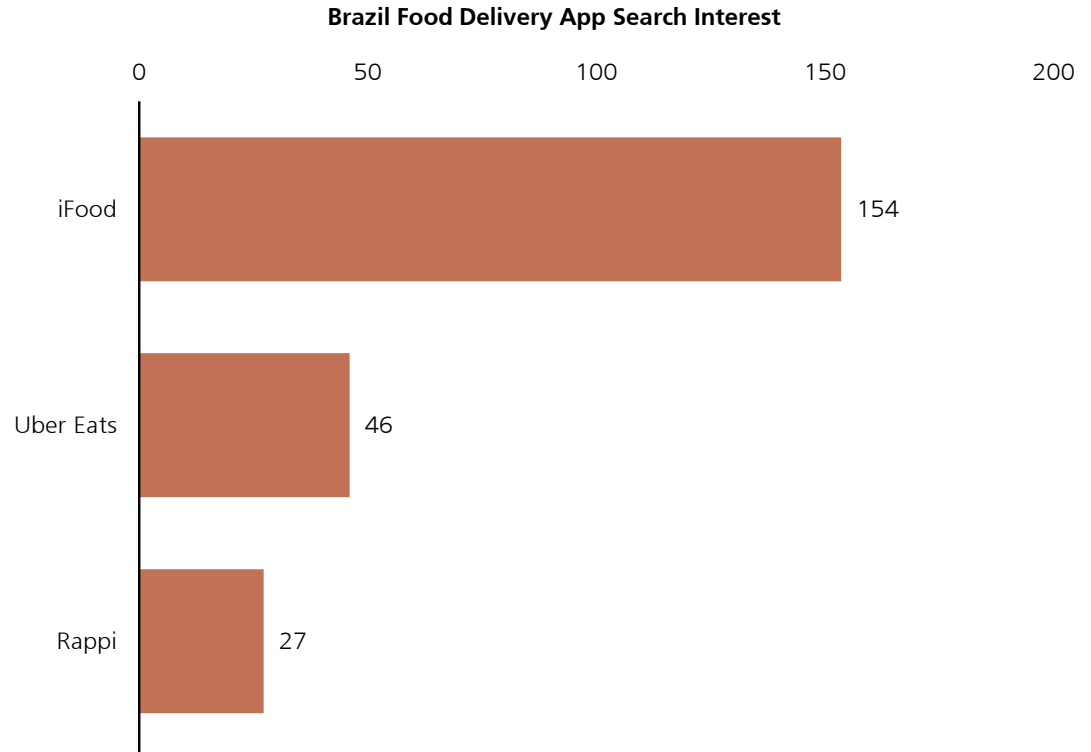


## Food Delivery Apps

## How are food delivery apps performing in Brazil?

UBS Evidence Lab uses Google search data (normalized for each region) to gauge consumer interest in food delivery apps in over a dozen countries.

- Brazilian company iFood has the highest search interest among food delivery platforms in Brazil; its search interest is more than 3x that of second-place Uber Eats.
- Search declined significantly for Rappi, while Uber Eats fell slightly.



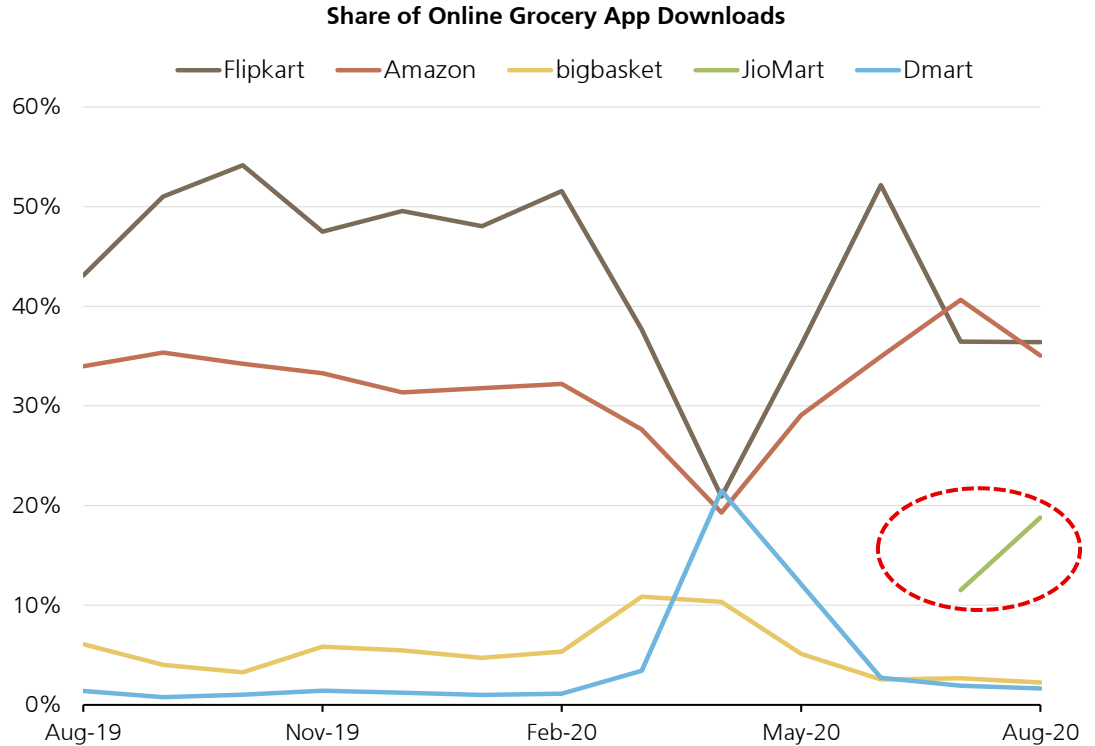
Source: UBS Evidence Lab, Google  
Note: Data as of September 5, 2020

## Grocery Apps

### Which online grocery apps are gaining share in India?

UBS Evidence Lab looks at online grocery app download share across the globe.

- JioMart launched in July and had a 12% share of downloads during its first month; as of late-August, its share had risen to 19%.
- During the COVID-19 pandemic, Flipkart's share of downloads fell significantly (from 52% at the end of February to 21% at the end of April); Amazon's share saw a similar pattern.
- In contrast, Dmart's share increased significantly (from 1% at end-February to 21% at end-April).



Source: UBS Evidence Lab

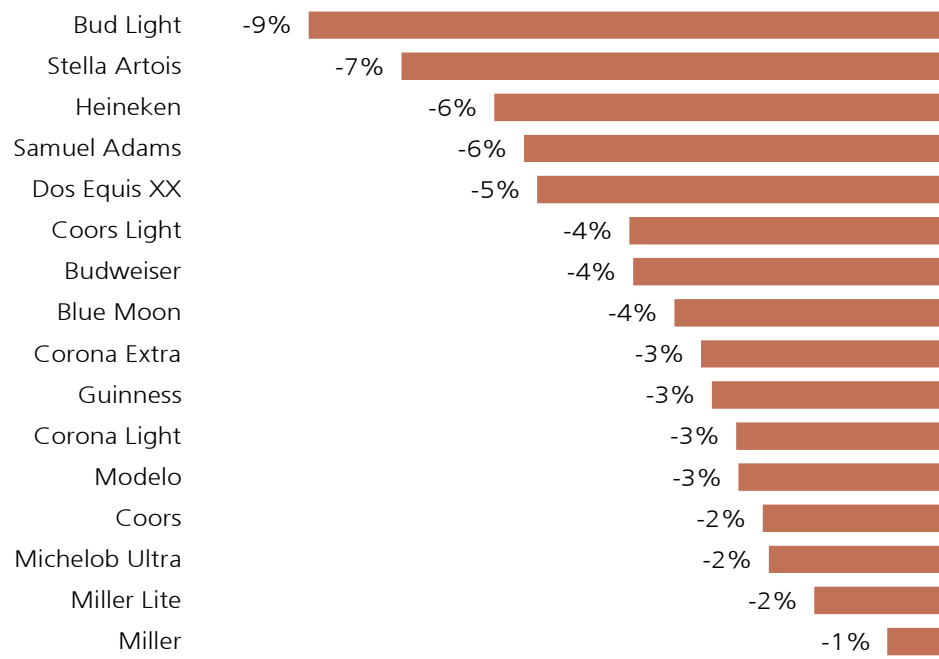
Alcohol Survey

## How are US alcohol preferences changing?

UBS Evidence Lab surveyed over 3,000 regular consumers of alcohol in the US in July/August 2020 about their preferred beverages, favorite brands, and frequency of partaking.

- The most popular beer brands saw a fall in regular consumption relative to a year ago.
- Bud Light fell the most, with 28% of consumers drinking it, down from 37% in the July 2019 survey.
- Other decliners were Stella Artois (21% to 14%), Heineken (25% to 19%), and Samuel Adams (22% to 17%).

**Net Change in Percent of Consumers Who Regularly Drank Beer Brand in Past 6 Months (July 2020 vs. July 2019)**

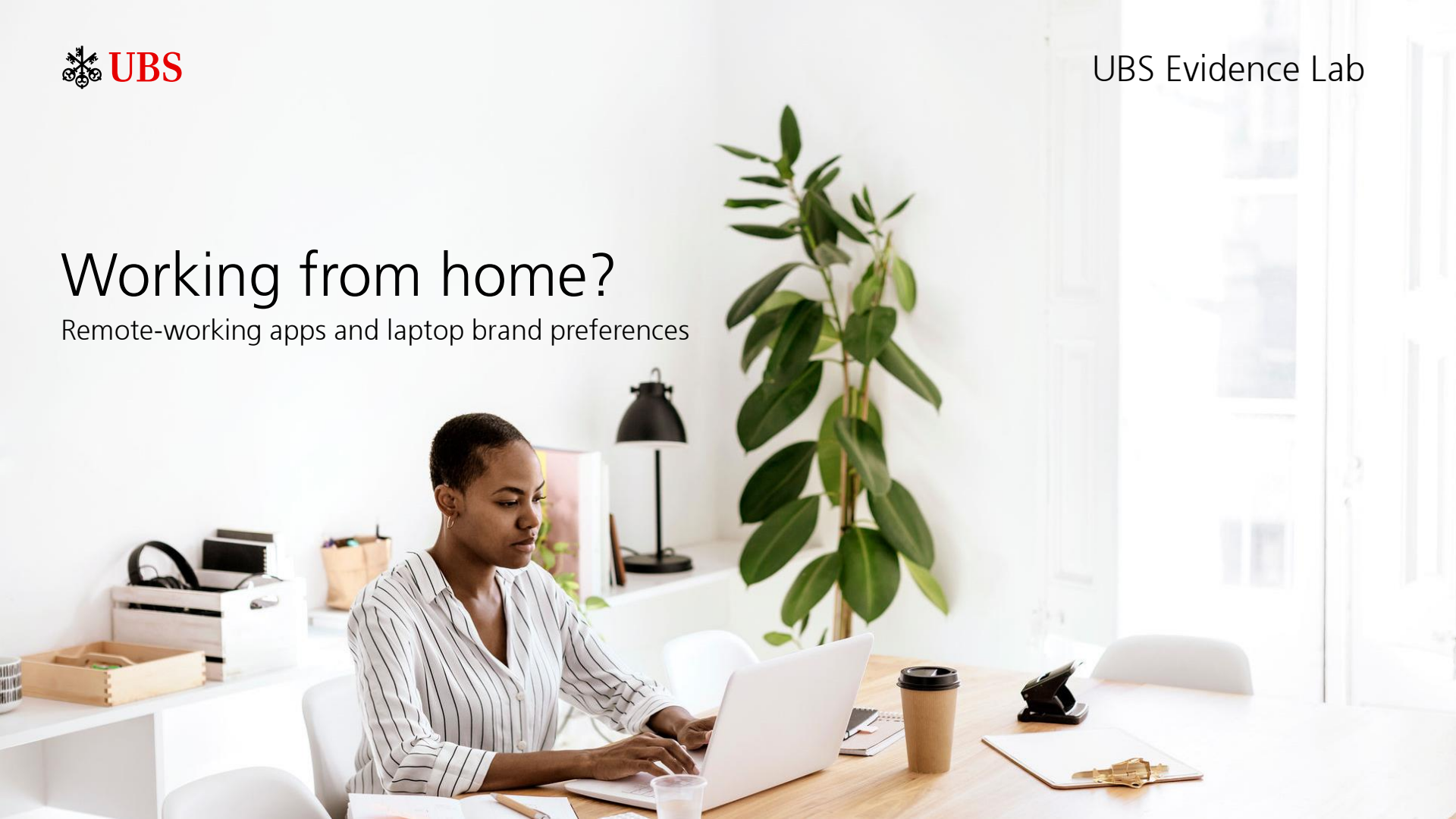


Source: UBS Evidence Lab



# Working from home?

Remote-working apps and laptop brand preferences



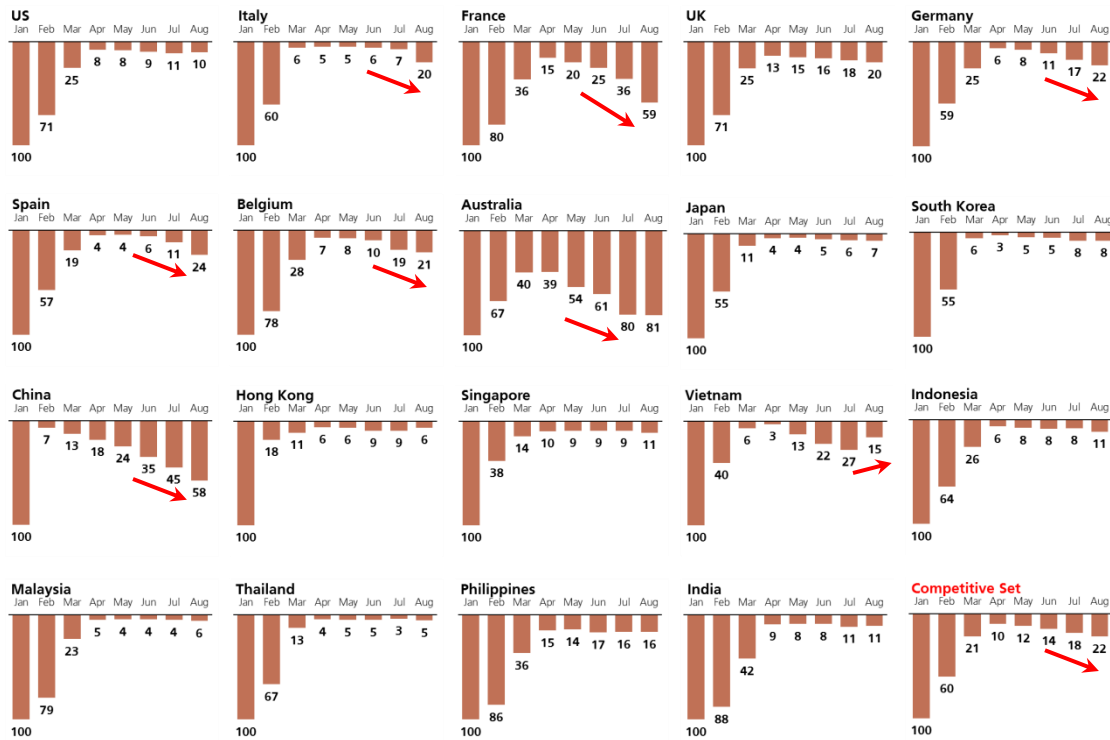
## Global Workplace Solution Apps

### Where are people still working from home?

UBS Evidence Lab monitors the average download ranking of the top 4 workplace solution apps in 19 markets around the world.

- In APAC, the download ranking continues to fall in China and remains flattish in other markets. Vietnam recently saw an uptick.
- Most markets in Europe have seen a noteworthy decline in the average download ranking; the UK is an exception.
- The average ranking in the US has been steady since April.

### Average Download Ranking – Top 4 Workplace Solution Apps



Source: UBS Evidence Lab, Sensor Tower

Note: Data as of August 22, 2020; top 4 apps' overall ranking is indexed to January 2020 in each market

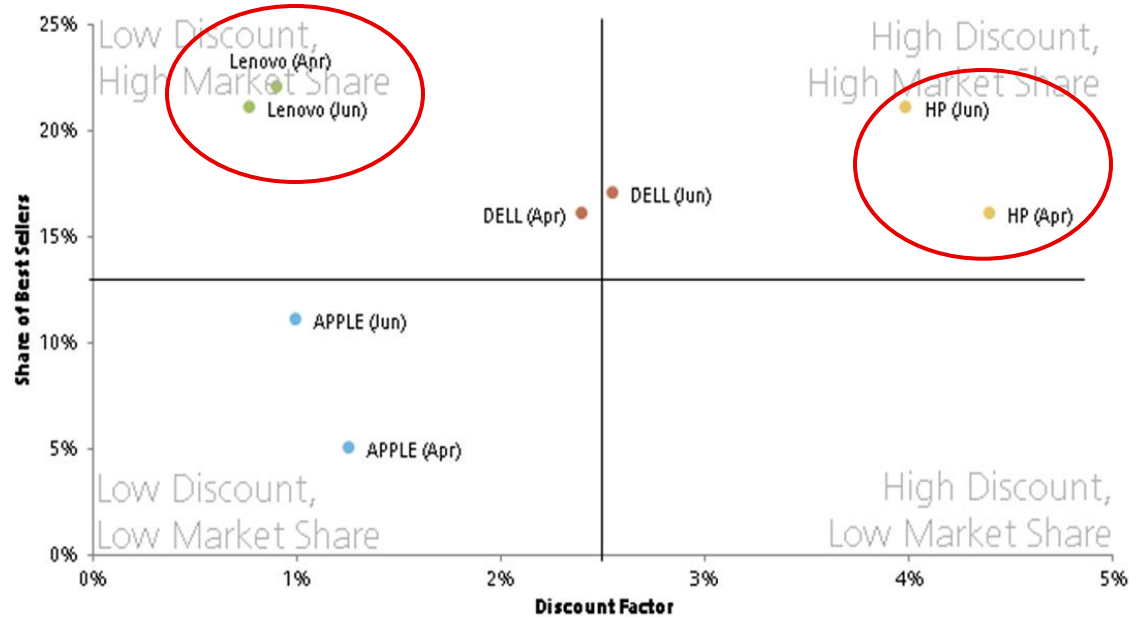
Retail – Laptops

### Which laptop brands discounted to clear inventory?

UBS Evidence Lab mines data from the web to evaluate companies' strategies for clearing inventory, including like-for-like price trends, inventory age, and promotion intensity.

- Among laptop brands, Lenovo had the highest share of best sellers in August and the lowest discounting.
- Hewlett-Packard had the highest discounting but was second in share of best sellers.

Laptop Brands – Share of Best Sellers vs. Discount Factor (August 2020)



Source: UBS Evidence Lab

Note: Discount factor is discount breadth x discount depth

# Healthcare from home?

Impact on telemedicine apps



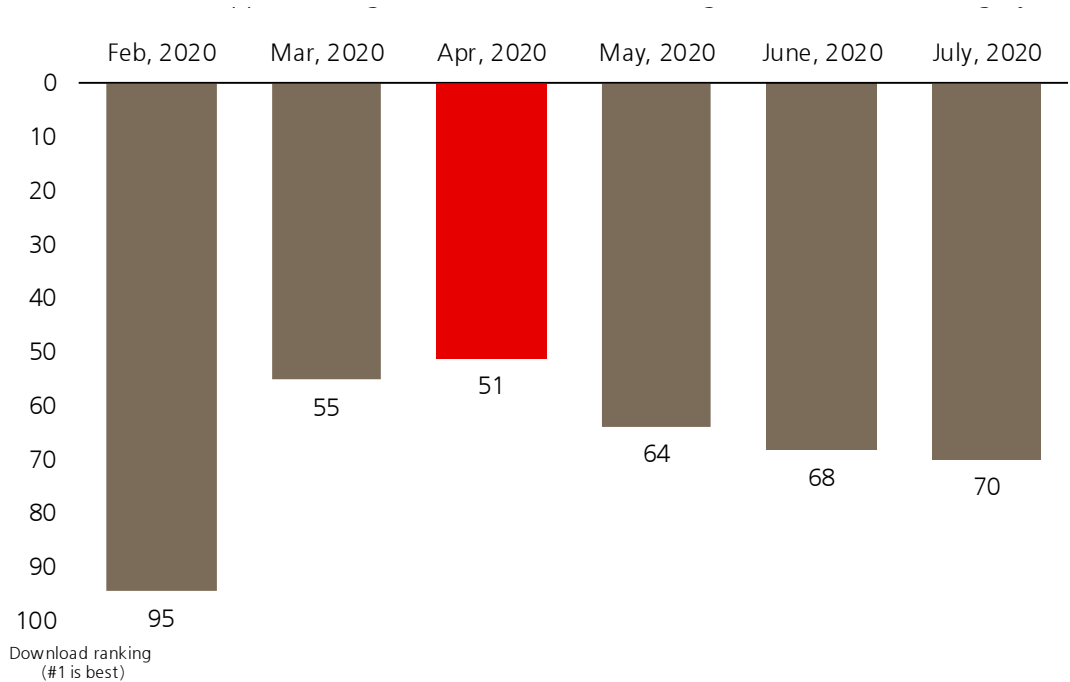
Telemedicine

## How did COVID-19 impact UK telemedicine app downloads?

UBS Evidence Lab tracks trends in app download rankings for telemedicine apps (apps that allow patients to have a remote visit with a doctor via video conferencing) around the world.

- In the UK, telemedicine apps' download ranking rose in March and peaked in April.
- Since April, the ranking has declined.

UK Telemedicine Apps: Average iPhone Download Ranking in Medical Category



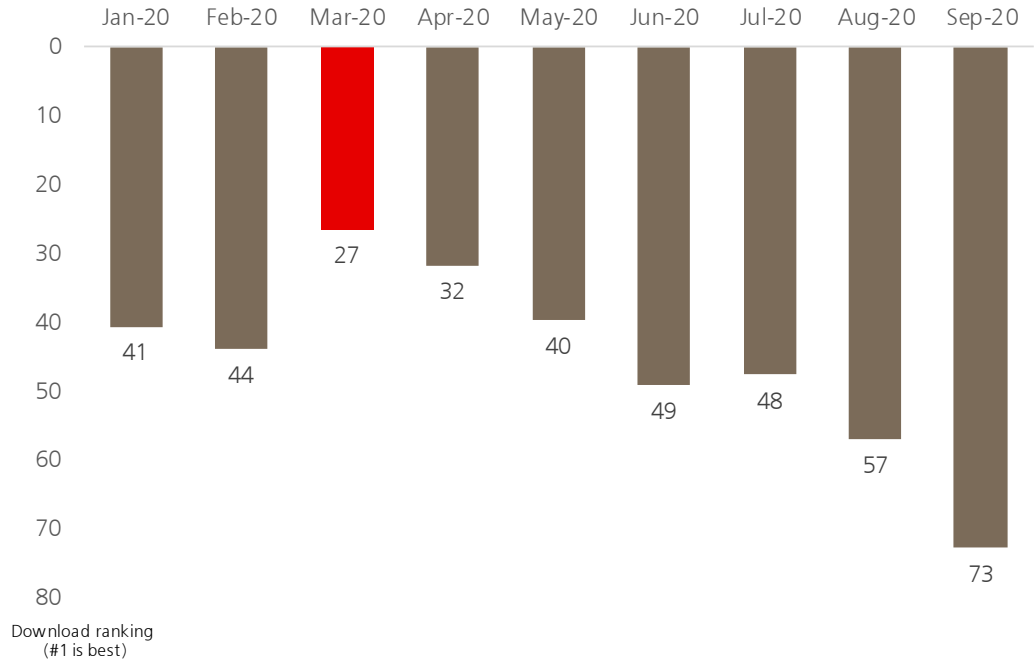
Source: UBS Evidence Lab

## Telemedicine

### How did COVID-19 impact US telemedicine app downloads?

- The download ranking of key US telemedicine apps peaked at #27 within the medical category in March, at the beginning of the pandemic.
- Their ranking has since declined to #73.

**US Telemedicine Apps: Average iPhone Download Ranking in Medical Category**



Source: UBS Evidence Lab

# Working out at home?

See which fitness apps are benefitting



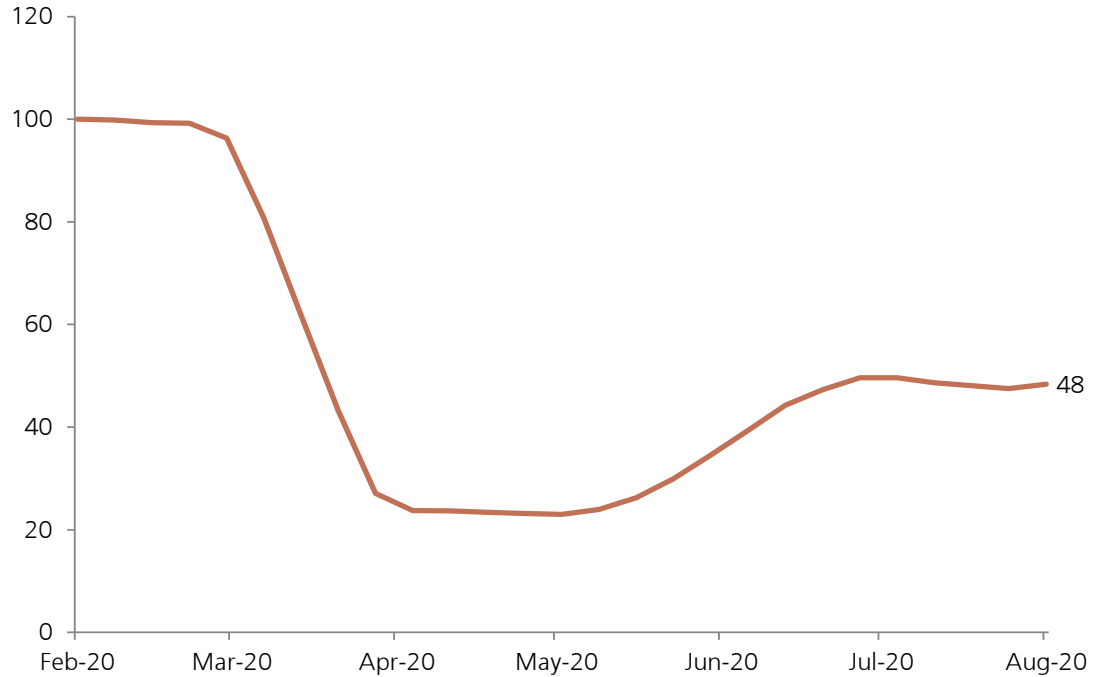
Foot Traffic

## Are people going to gyms and fitness centers?

UBS Evidence Lab's foot traffic data shows how often people are frequenting locations like retailers, restaurants, and gyms.

- People are going to the gym less often than they did before COVID-19.
- Foot traffic to gyms and fitness centers fell sharply in April and is still 50% below February levels.

Daily Foot Traffic to Gyms and Fitness Centers (Indexed Weekly Trend, Trailing 4 Weeks)



Source: UBS Evidence Lab



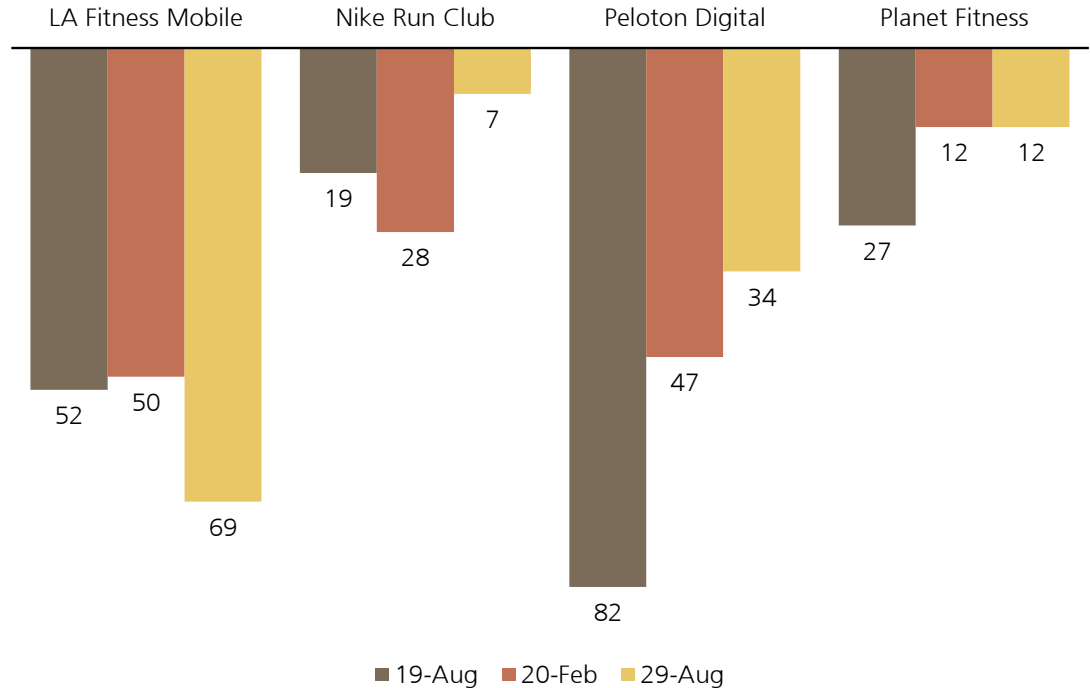
Fitness Apps

**Which apps are benefiting from the home fitness trend in terms of rank?**

UBS Evidence Lab monitors daily download rankings and share for thousands of apps in the iOS and Google Play stores.

- Peloton Digital's app download ranking in the health & fitness category has risen to #34 from #82 a year ago. It remains behind Nike Run Club and Planet Fitness Mobile.
- LA Fitness Mobile's ranking has fallen to #69 from #52 a year ago.

**US Fitness Apps Download Ranking (Health & Fitness Category)**



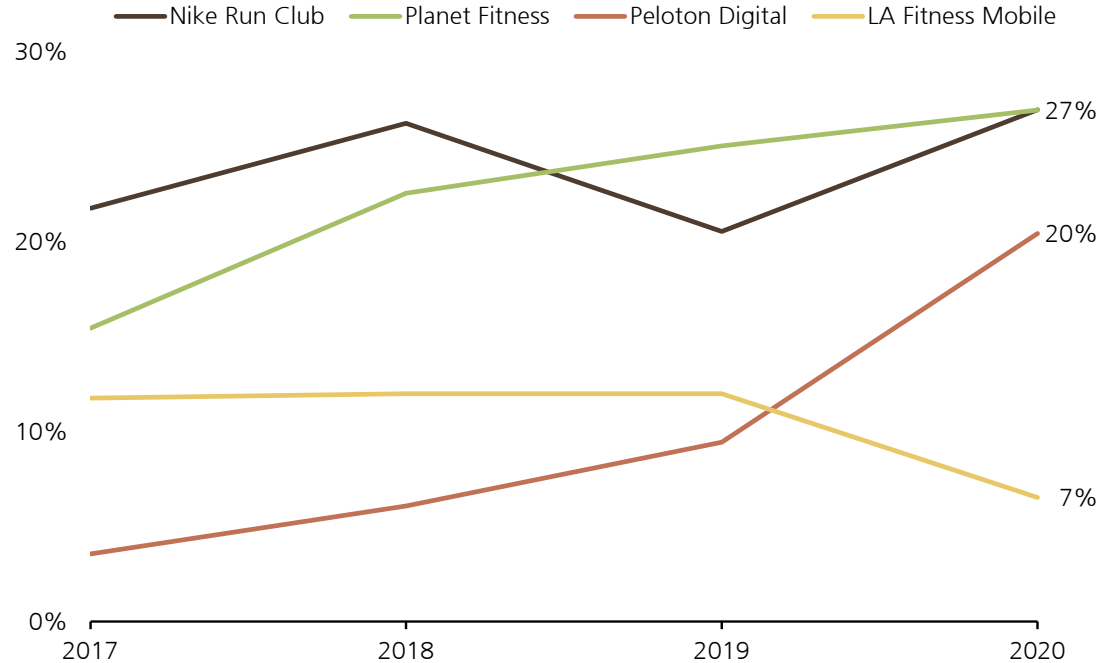
Source: UBS Evidence Lab, Sensor Tower

## Fitness Apps

### Which apps are benefiting from the home fitness trend in terms of share?

- Peloton Digital's share of app downloads in the health & fitness category has more than doubled, to 20% in 2020 YTD from 9% in full-year 2019.
- Nike Run Club and Planet Fitness Mobile remain at the top, while LA Fitness Mobile's share has declined.

US Fitness Apps Share of Downloads (Health & Fitness Category)



Source: UBS Evidence Lab, Sensor Tower

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Expiration: 9/30/21

Review Code: IS2005776