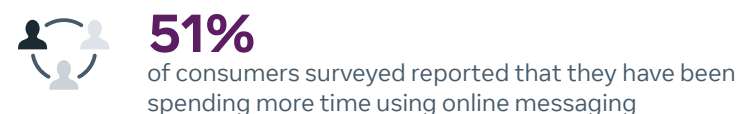


Digital Tools in Crisis and Recovery

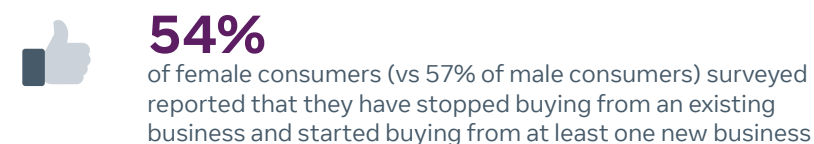
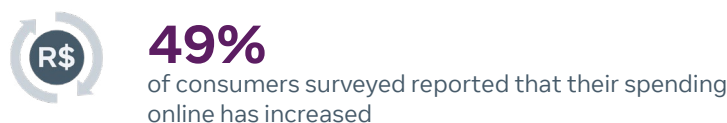
HOW CONSUMERS IN BRAZIL HAVE ADAPTED TO COVID-19

The Digital Tools Consumer Survey was conducted in July 2020 to assess how consumers' utilization of digital technologies and social media has adapted to support continued engagement with businesses during the COVID-19 pandemic in 13 countries across the world. The objective of this research is to provide timely and relevant insights on the impacts of COVID-19 on consumers, and the adjustments they have implemented in these unprecedented times amid quickly changing conditions.

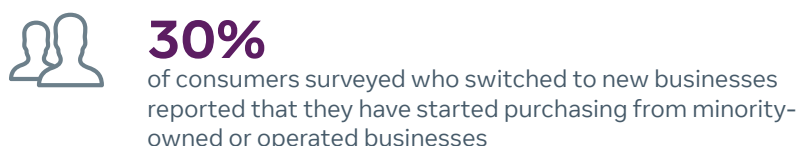
Changing habits of consumers: using online messaging and social media



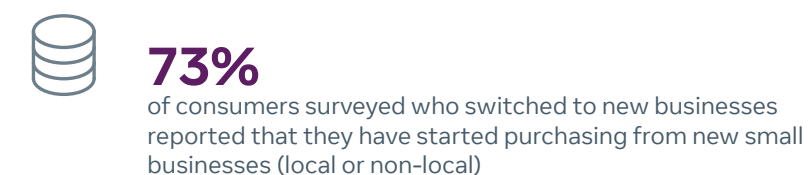
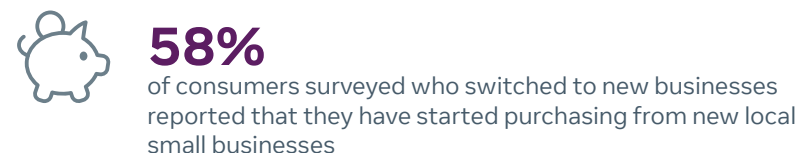
Changing habits of consumers: spending



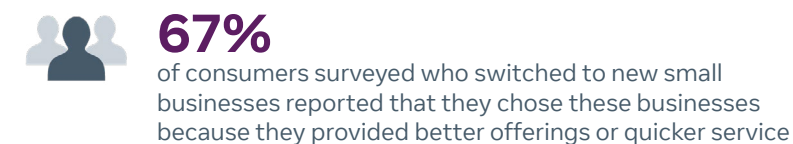
Purchasing from businesses led by underrepresented groups



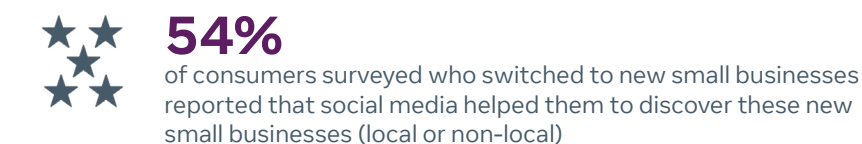
Purchasing from new (local) small businesses



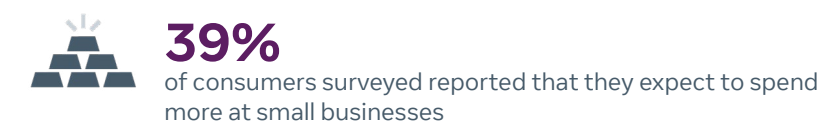
Motivations for purchasing from new small businesses



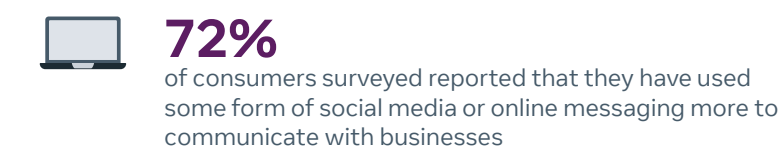
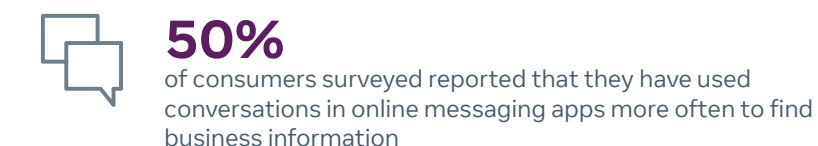
Using social media to discover and buy from new businesses



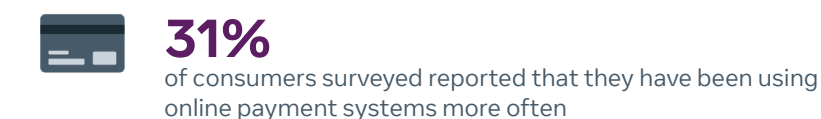
Future plans for purchasing after the pandemic is over



Changing usage of social media and online messaging to engage with businesses



Changing usage and utility of digital tools



The Digital Tools Consumer Survey was conducted in July 2020 among adult internet users by Ipsos Public Affairs, with at least 500 respondents in each country. Only adults 18+ qualified for the sample. Respondents were asked their opinions and experiences regarding the impacts of COVID-19 on their activities and engagement with businesses via digital tools and social media. A number of opt-in online panels were used for sampling and survey administration. Subsequent to data collection, a multi-step process was used for weighting to adjust for representativeness in accordance with demographic characteristics, including age, gender, education, and region, in line with the latest online population statistics. As such, the sample is representative of the 18+ online population of each country. For more details on the methodology and sampling for this survey, see the Deloitte Digital Tools in Crisis and Recovery Consumer Report.