

# The New Normal

## Living Life Online



ForgeRock Report Investigates How Consumer Behaviors Are  
Adapting Globally in Response to COVID-19

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**VOLUME 1**

# Executive Summary

In 2020, COVID-19 impacted the global economy far more than anyone anticipated. The pandemic changed the way people across the globe live, work, learn and play. For many consumers, online apps and services became the de facto replacement for activities they had previously done in-person. As people were forced to seek alternate ways to engage with the world, many are now finding some online experiences are preferred over in-person options.

This survey polled 5,000 consumers throughout the U.S., U.K., Germany, Australia and Singapore to understand how their daily routines, experiences and preferences have evolved since the start of the COVID-19 pandemic and how they plan to purchase and engage with the world in the future.

## Key findings of this report include:

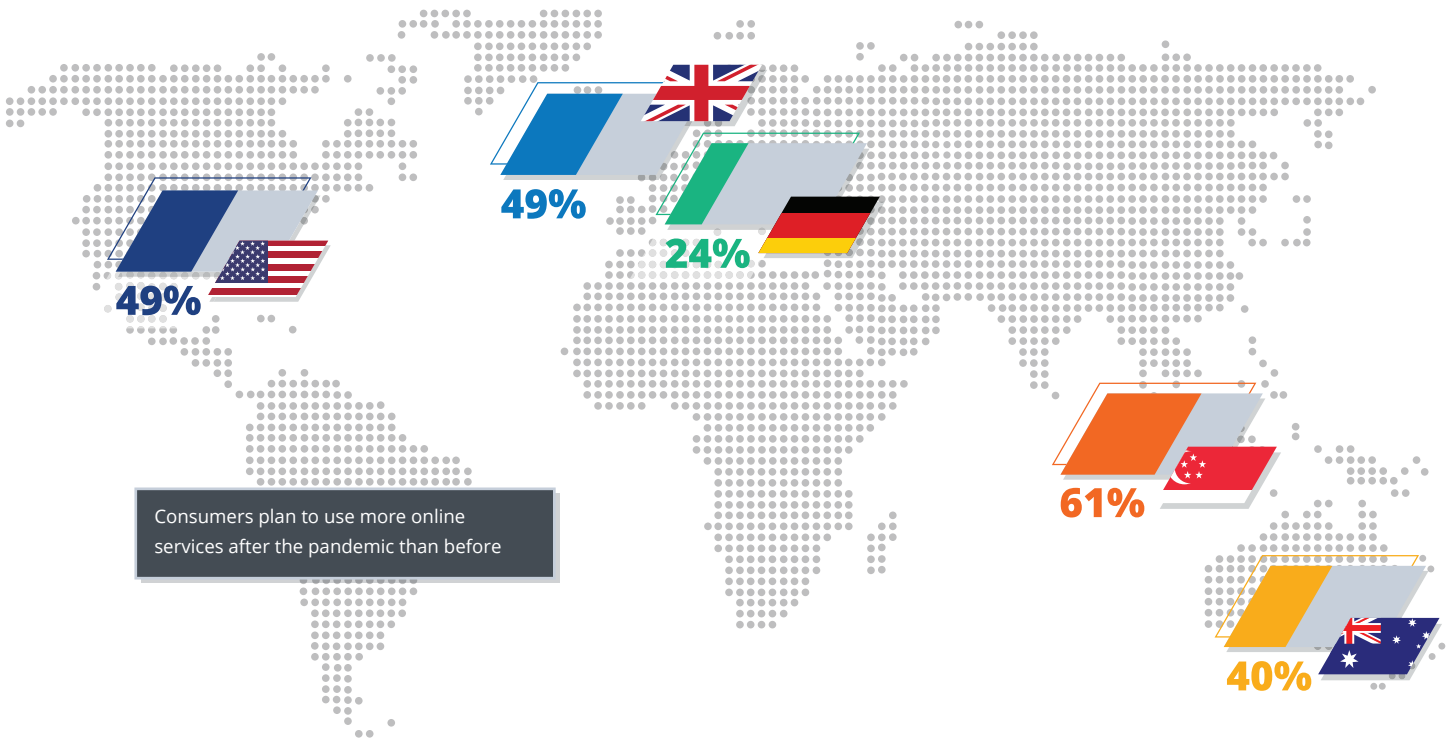
- Nearly half of all consumers polled say they will use more online services post-pandemic than they did before it started.
- However, more than one-third (35%) warn that a difficult log-in process would cause them to cancel their account, while 32% said they would look to another service.
- Consumers 65 and older have embraced their new digital lifestyles, with 31% reporting they plan to only shop online after stay-at-home restrictions are lifted.
- One-third of consumers ages 18-24 won't be returning to stadiums or theatres; instead they plan to keep watching sports, concerts and movies online post-pandemic.

## COVID-19 Pandemic Accelerates Adoption of Online Services and Apps



**45% of Consumers Plan to Use More Online Services Post-pandemic than Before It Started**

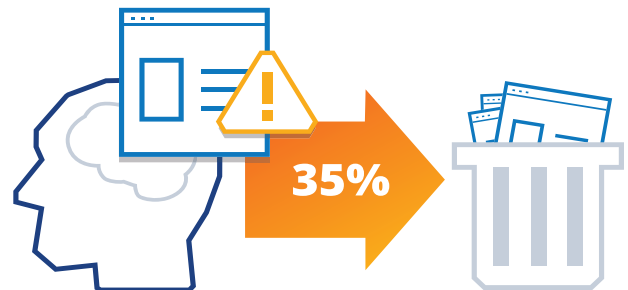
# Global View



We're living through extraordinary times that have forced people around the globe to find digital replacements for activities that were once done in person. Consumers have adopted new online services and apps at a record pace since the start of the pandemic (63%), introducing many people to digital experiences for the first time or adding more bulk to an already large collection of apps and services to manage. When asked whether this new digital lifestyle would last beyond the COVID-19 pandemic, respondents across the globe indicate that the "new normal" means something different depending on where you live and how old you are. But nearly half agree that they will use more online services and apps post-pandemic than before.

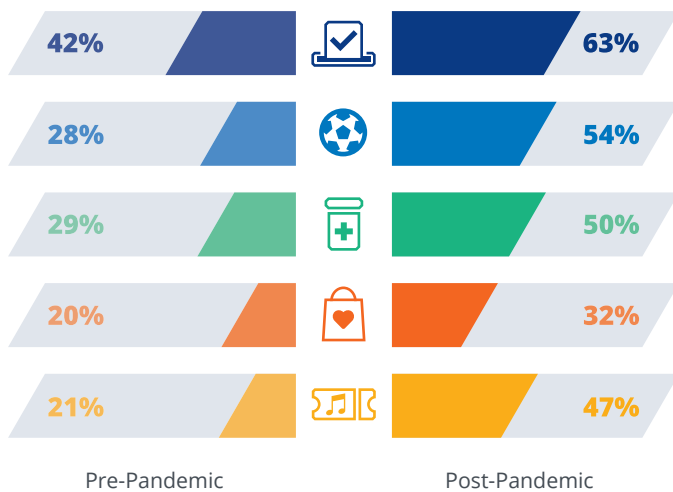
Leading the transition to digital life during the pandemic were 25-34-year-olds, who adopted more new apps and online accounts than any other group. But 18-24-year-olds are the most committed to their new online habits, with an average of 34% revealing that their new apps and online services would completely replace in-person activities. However, as more consumers adopt online services, they expect frictionless access, with over one-third of total respondents

(35%) saying they will cancel or delete the account or app if they have trouble accessing it.



In addition, consumers spent more time on apps during the pandemic, specifically for banking, retail and entertainment. Younger cohorts were found to use more apps of all kinds, but the 65+ group have grown particularly more accustomed to online retail and grocery buying. Globally, 65+ was the largest age group that signed up for new online grocery accounts to replace in-person shopping. However, nearly half of this age demographic plans to switch back to in-person-only shopping post-pandemic (45%).

### Online Activity Preference Pre-Pandemic vs. Post-Pandemic



### Overwhelmingly, consumers now prefer to do more online:

- Almost two-thirds of all respondents prefer registering to vote online (**63%**).
- More than half (**54%**) of all consumers surveyed prefer to watch sporting events online, while nearly the same number (**47%**) like to go online to watch a concert or musical performance.
- Half of all consumers now prefer to fill their prescriptions online.



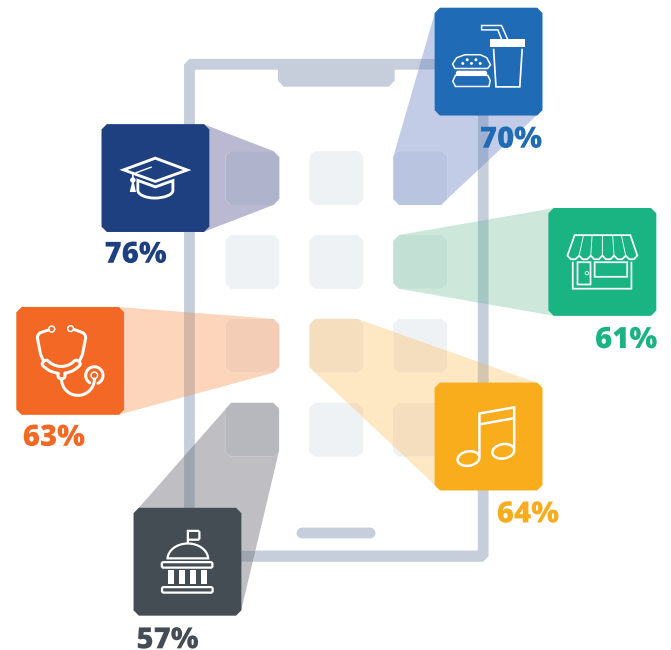
- More than half of all consumers (**56%**) plan to continue shopping online post-pandemic, compared to just **5%** who say they will shop only in-person afterward.

### However, there is no digital substitute for doing some activities in person:

- Two-thirds (66%) of consumers still prefer grocery shopping in-person, down just 16% since the pandemic started.
- Most consumers (71%) prefer in-person doctor and healthcare visits.

There were clear winners as activities transitioned to digital, with at least half of consumers adding apps and online services in healthcare (**63%**), education (**76%**), retail (**61%**), government (**57%**), entertainment (**64%**) and restaurants or food delivery (**70%**) since the pandemic began.

### Consumers Added Apps in 6 Main Categories during the Pandemic



Banks lead the way in providing online services for consumers across the globe, with use of banking apps increasing during the pandemic. Most consumers prefer to check their account balance (86%) and make a bank transfer (84%) online. When COVID-19 restrictions subside, 60% of respondents plan to bank either only or primarily online, with the majority being those in the 35-44 age group.

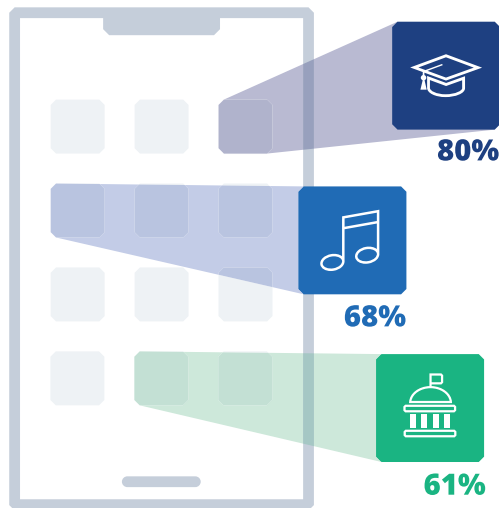
Overall, the rapid adoption of apps and online services is changing consumer preferences long-term. This significant shift in consumer behavior creates new opportunities for companies to strengthen relationships with their customers by delivering digital experiences that help them get things done quickly and easily and feel just as natural as their in-person predecessors. It's clear that consumers don't hesitate to find alternatives when an app or online service disappoints with a poor experience. The good news is nearly two-thirds (63%) of people are seeking digital solutions that won't slow down their lives and are open to trying new apps and services now more than ever before.

# Regional Insights

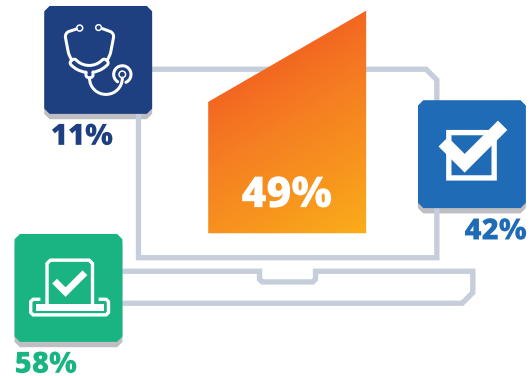


## A Look Inside the United States

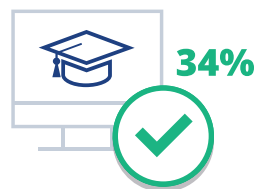
How consumers responded to the stay-at-home economy during COVID-19



Among the regions surveyed, the U.S. came in second for adding new apps and online accounts to their lives during the pandemic. More Americans downloaded food-related apps or online services compared to any other country. Categories that also saw significant uptick in adoption were education (80%), entertainment (68%) and government services (61%).



After COVID-19 restrictions are lifted, nearly half of U.S. consumers surveyed will use more online services and apps than before the pandemic (49%), with this region being most comfortable with seeking online-only healthcare services (11%). With the impending election in November, the number of U.S. respondents who reported wanting to vote online doubled during the pandemic (42%), now constituting close to half of all voters. In addition, more than half (58%) of Americans prefer to register to vote online.



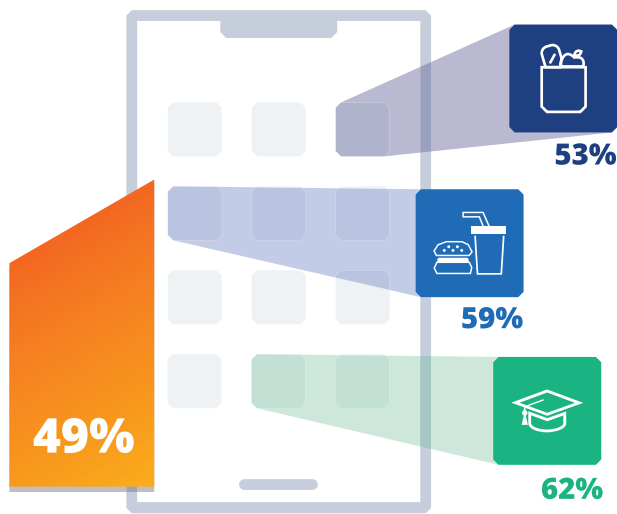
With schools across the country rolling out hybrid or fully online classes, Americans are also more likely to stick with online classes when given a choice compared to other regions (34%).

# Regional Insights

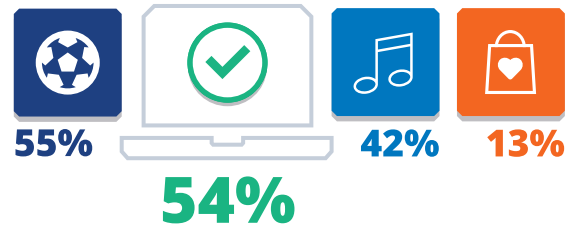


## A Look Inside the United Kingdom

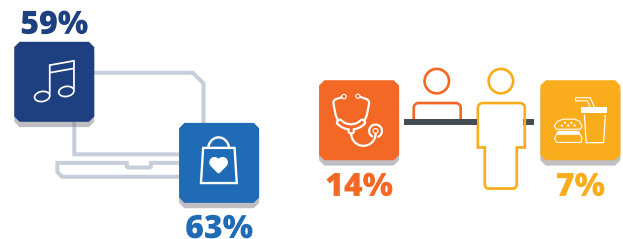
How consumers responded to the stay-at-home economy during COVID-19



More than half of Britons surveyed opened anywhere from one to three new grocery (53%), food delivery (59%) and education (62%) apps since the start of the pandemic. Like the U.S., 49% of Britons, including large percentages across all age groups, say that they will continue to use more online services after the pandemic than they did before, led by the 35-44 age group.



Compared to pre-pandemic behaviors, U.K. respondents prefer to perform many activities online with the greatest shift in preference in the entertainment category, with more than half (54%) saying they would rather go online than in-person. Particularly, Britons prefer watching sporting events online more now (55%) than before the pandemic (28%). Nearly half of U.K. respondents also use entertainment apps more frequently since the start of the pandemic (42%). In addition, online clothes shopping is now 13% more popular than in-person shopping.



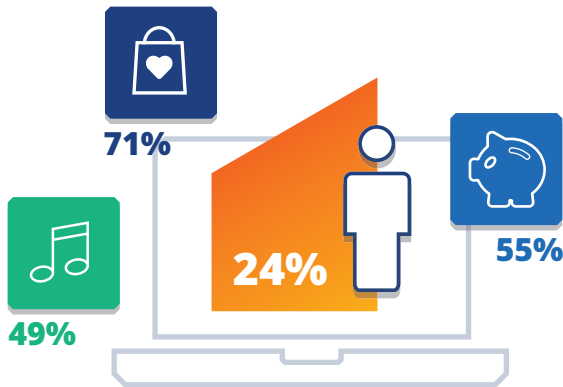
The majority of Britons said they will use entertainment (59%) and retail (63%) only or primarily online post-pandemic. A surprisingly low number of people say they plan to use healthcare (14%) and restaurants and food delivery (7%) only in-person after restrictions lift.

# Regional Insights

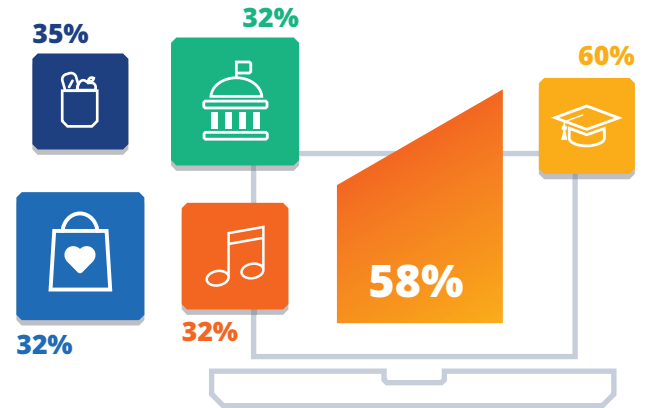


## A Look Inside Germany

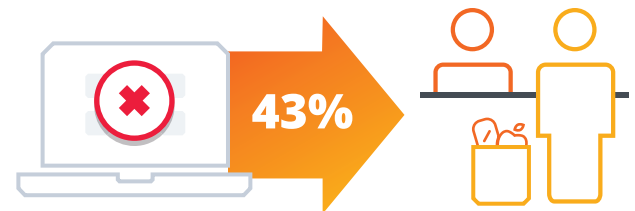
How consumers responded to the stay-at-home economy during COVID-19



Germans favor in-person experiences more than other countries and plan to transition back to them after the pandemic. Preferred online activities included retail (71%), banking (55%) and entertainment (49%). However, only 24% agree that they will use more online services after the pandemic restrictions lift than before, the lowest among all the countries surveyed.



In contrast to consumers in the rest of the world, more German respondents reported they had no online accounts or apps in certain categories prior to the pandemic, particularly for grocery, education and healthcare. Those that did have apps continued to use them at the same frequency as before the pandemic. However, as the pandemic spread, more than half (58%) of German respondents signed up for apps or online accounts across these categories. The areas where they expect apps to replace in-person activities the most are in grocery (35%), retail (32%), government (32%) and entertainment (32%). Additionally, since the pandemic began, the number of Germans who now prefer taking online classes increased almost 60%, amounting to more than half of those surveyed.



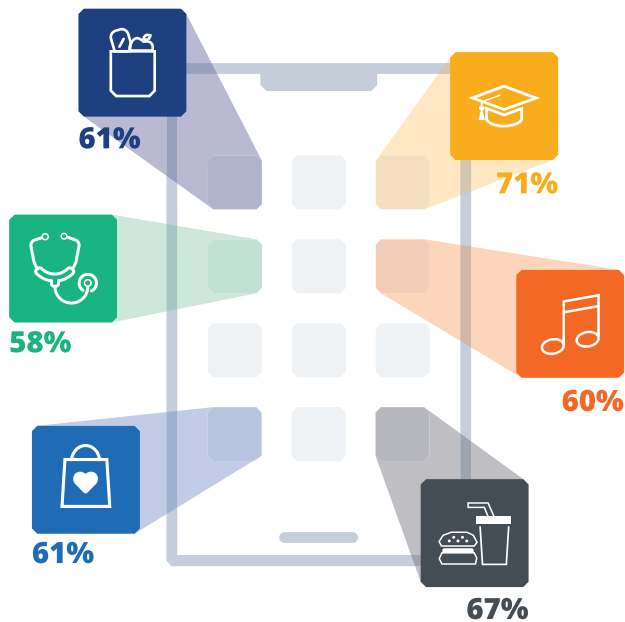
However, the adoption of online accounts and apps for grocery might be short lived, as 43% plan on switching back to in-person shopping post-pandemic.

# Regional Insights



## A Look Inside Australia

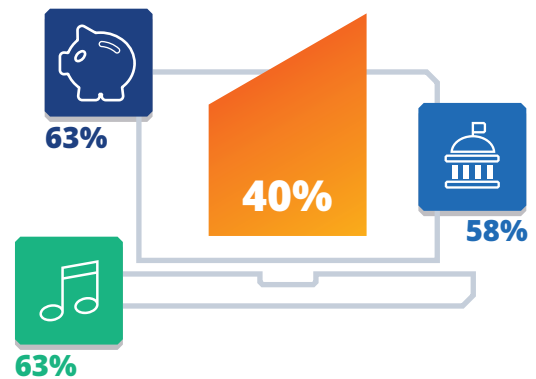
How consumers responded to the stay-at-home economy during COVID-19



Since the start of the pandemic, Australians significantly increased digital adoption, with more than half signing up for apps or online services in grocery (61%), healthcare (58%), retail (61%), education (71%), entertainment (60%) and food delivery services (67%).



Of these new accounts, entertainment will continue to be used mostly or only online after restrictions lift, particularly as 26% of Australians have **four or more** entertainment apps or accounts. The same percentage of respondents (26%) reported that the new **online services** have replaced **in-person** activities.



After the pandemic restrictions lift, 40% of Australians said they would use more online services than before, with banking (63%), government services (58%) and entertainment (53%) services being the most predominant industries.

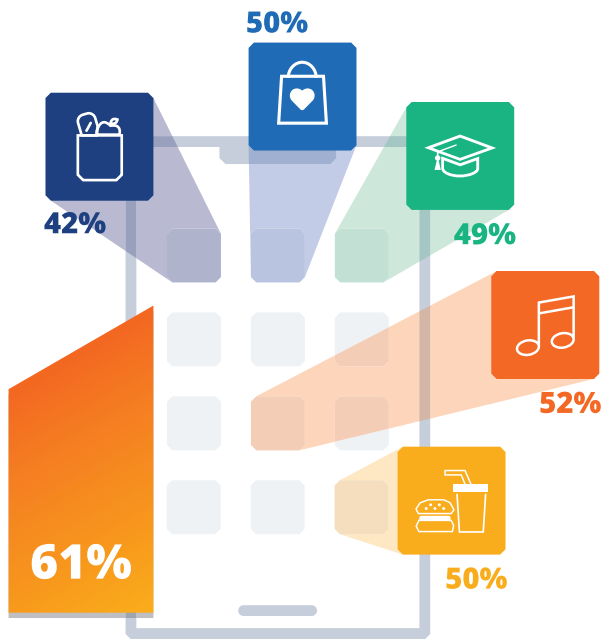


# Regional Insights

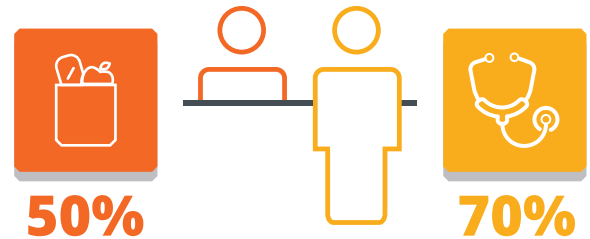


## A Look Inside Singapore

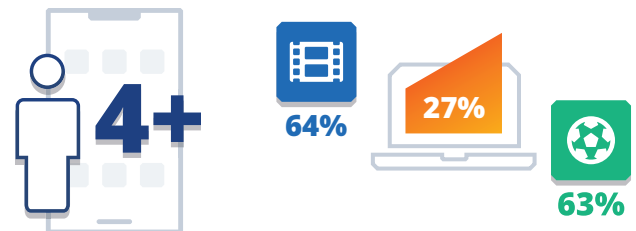
How consumers responded to the stay-at-home economy during COVID-19



Since the start of the pandemic, Singaporeans are turning to online services more frequently, including grocery (42%), retail (50%), education (49%), entertainment (52%) and food delivery services (50%). Knowing this, it is no surprise that nearly two-thirds (61%) will continue to use more online services after the pandemic, the highest of all regions surveyed.



Singaporeans are among the leading digital adopters – both downloading a significant number of new apps during the pandemic and using them as a replacement to in-person activities. However, like other regions, there are still activities people prefer to handle in-person, including grocery shopping (50%) and doctor health checks (70%).



Of note, 14% of Singaporeans said they signed up for **four or more** retail apps since the start of the pandemic, more than any other region. Likewise, watching a movie (64%) and sports events (63%) are now preferred to take place online vs. in-person, increasing 27% for both.

Singapore also engages frequently with government services online, with two-thirds planning to engage mostly or only online after the pandemic restrictions are lifted.

# Conclusion

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Across the globe, nearly half of consumers anticipate using more online services after the pandemic. This suggests a long-term shift in consumer behavior and businesses must be prepared to respond to this demand.

Based on these findings, entertainment, retail and banking will continue to experience increased online usage after the pandemic. However, other categories, including healthcare and grocery, will likely revert back to in-person experiences, likely due to the personal nature of the activities. Other areas, such as education, could see a future that is served by a hybrid model.

With the countless unknowns associated with COVID-19 and its continued impact on how consumers live, work, learn and play, businesses and organizations that do not heed the shift in consumer behavior risk falling short of consumer expectations, and potentially missing out on big revenue opportunities.

ForgeRock, the leading provider in digital identity, is obsessed with providing exceptional user experiences. Volume two of this report addresses the impact experiences have on consumer use and engagement with apps and online services. To learn more, visit [ForgeRock.com/TheNewNormal](https://www.forgerock.com/TheNewNormal).

## About ForgeRock

ForgeRock, the leader in digital identity, delivers modern and comprehensive Identity and Access Management solutions for consumers, employees and things to simply and safely access the connected world. Using ForgeRock, more than a thousand global customer organizations orchestrate, manage, and secure the complete lifecycle of identities from dynamic access controls, governance, APIs, and storing authoritative data – consumable in any cloud or hybrid environment. The company is privately held, and headquartered in San Francisco, California, with offices around the world. For more information and free downloads, visit [www.forgerock.com](https://www.forgerock.com) or follow ForgeRock on social media.



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