

GLOBAL BAROMETER WAVE 5

# Consumer Health

toluna\*



harris  
interactive

  
KURUNDATA

# About this study

ITWP companies Toluna, Harris Interactive and KuRunData have developed an ongoing study to understand the impact that the Coronavirus has on daily life.

The study will be conducted **every 2 weeks** and started on March 31.

**This report covers 19 markets.**






Findings highlight the importance of consumer insights for brands and businesses as they consider *'The Next Normal.'*

**We've created a series first focused on the immediate impact and disruption, and embarked on a second chapter in our series which looks at how people feel as they move out of quarantine.**



# Wave 5: Markets studied and field schedule

Below is the field schedule and number of completed interviews by market included in this wave of research. Data has been weighted by age, gender and region to be Census representative in all markets (except UAE and the Philippines where regions are not weighted, and India where we're Internet representative). In France, data is also weighted to reflect social grade.

	MARKET	COMPLETED INTERVIEWS	FIELDWORK DATES
	UK	<b>1,379</b>	26 <sup>th</sup> – 28 <sup>th</sup> May 2020
	France	<b>1,088</b>	27 <sup>th</sup> – 29 <sup>th</sup> May 2020
	Germany	<b>1,083</b>	27 <sup>th</sup> – 28 <sup>th</sup> May 2020
	Italy	<b>1,097</b>	27 <sup>th</sup> – 28 <sup>th</sup> May 2020
	Spain	<b>1,116</b>	27 <sup>th</sup> – 29 <sup>th</sup> May 2020

	MARKET	COMPLETED INTERVIEWS	FIELDWORK DATES
	Australia	<b>1,096</b>	26 <sup>th</sup> – 28 <sup>th</sup> May 2020
	Singapore	<b>536</b>	26 <sup>th</sup> – 28 <sup>th</sup> May 2020
	Malaysia	<b>540</b>	28 <sup>th</sup> May – 1 <sup>st</sup> June 2020
	Indonesia	<b>533</b>	28 <sup>th</sup> – 29 <sup>th</sup> May 2020
	Philippines	<b>533</b>	28 <sup>th</sup> – 29 <sup>th</sup> May 2020
	Thailand	<b>541</b>	27 <sup>th</sup> – 29 <sup>th</sup> May 2020
	Japan	<b>1,158</b>	27 <sup>th</sup> – 28 <sup>th</sup> May 2020
	Korea	<b>1,104</b>	27 <sup>th</sup> – 28 <sup>th</sup> May 2020
	China	<b>1,049</b>	27 <sup>th</sup> May – 1 <sup>st</sup> June 2020
	Hong Kong	<b>545</b>	28 <sup>th</sup> May – 1 <sup>st</sup> June 2020
	India	<b>1,076</b>	26 <sup>th</sup> – 28 <sup>th</sup> May 2020
	UAE	<b>521</b>	28 <sup>th</sup> May – 1 <sup>st</sup> June 2020
	MARKET	COMPLETED INTERVIEWS	FIELDWORK DATES
	United States	<b>1,055</b>	26 <sup>th</sup> – 28 <sup>th</sup> May 2020
	Brazil	<b>1,065</b>	27 <sup>th</sup> – 29 <sup>th</sup> May 2020

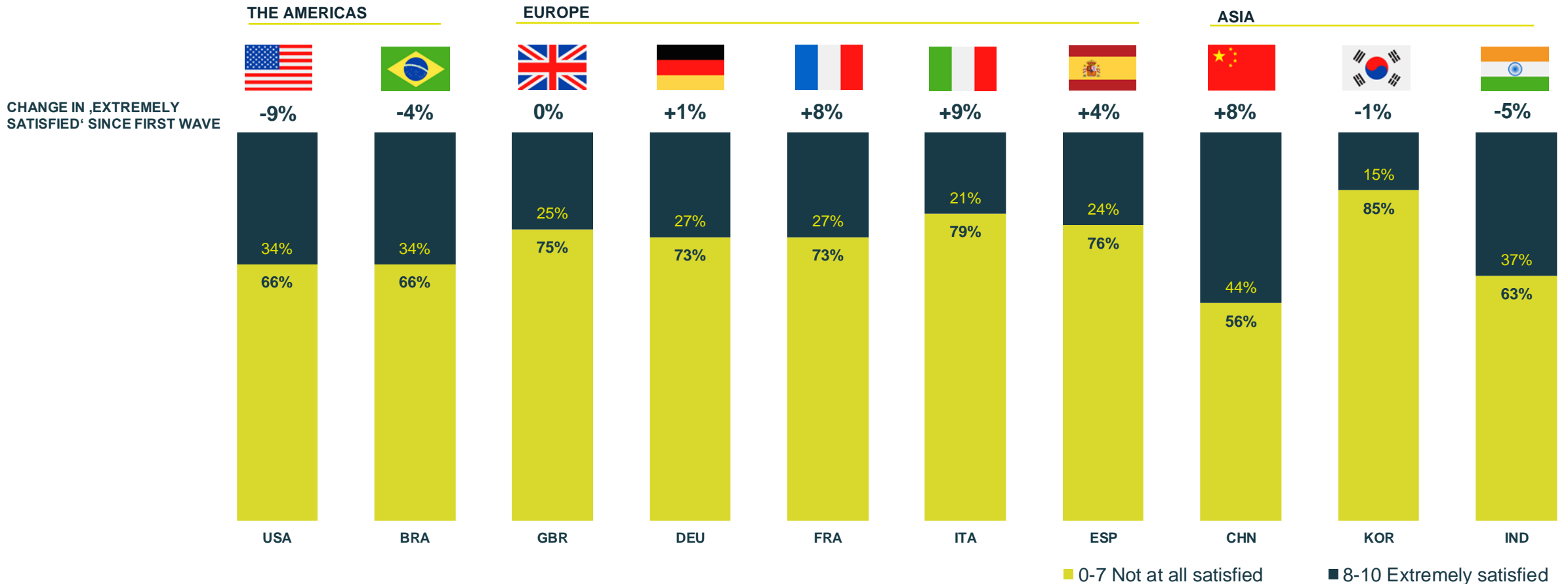
# Consumer Health has changed as a result of COVID-19

- People all over the world are taking health-related actions to reduce their risk of getting ill. Around 80% are washing their hands more frequently and many are using products to prevent spreading of germs.
- Countries that were hit hard by the COVID-19 pandemic like Italy, Spain and Brazil think their healthcare system should be improved to better handle future crisis.
- German consumers seem to be most “relaxed”. They take a lower number of actions due to Corona, feel less stressed and do not shift visits at the doctor.
- Personal health and self-care have become more important in the crisis in all countries.
- Telemedicine is not widely used so far, but the desire for “telehealth” opportunities has risen as a result of the pandemic.



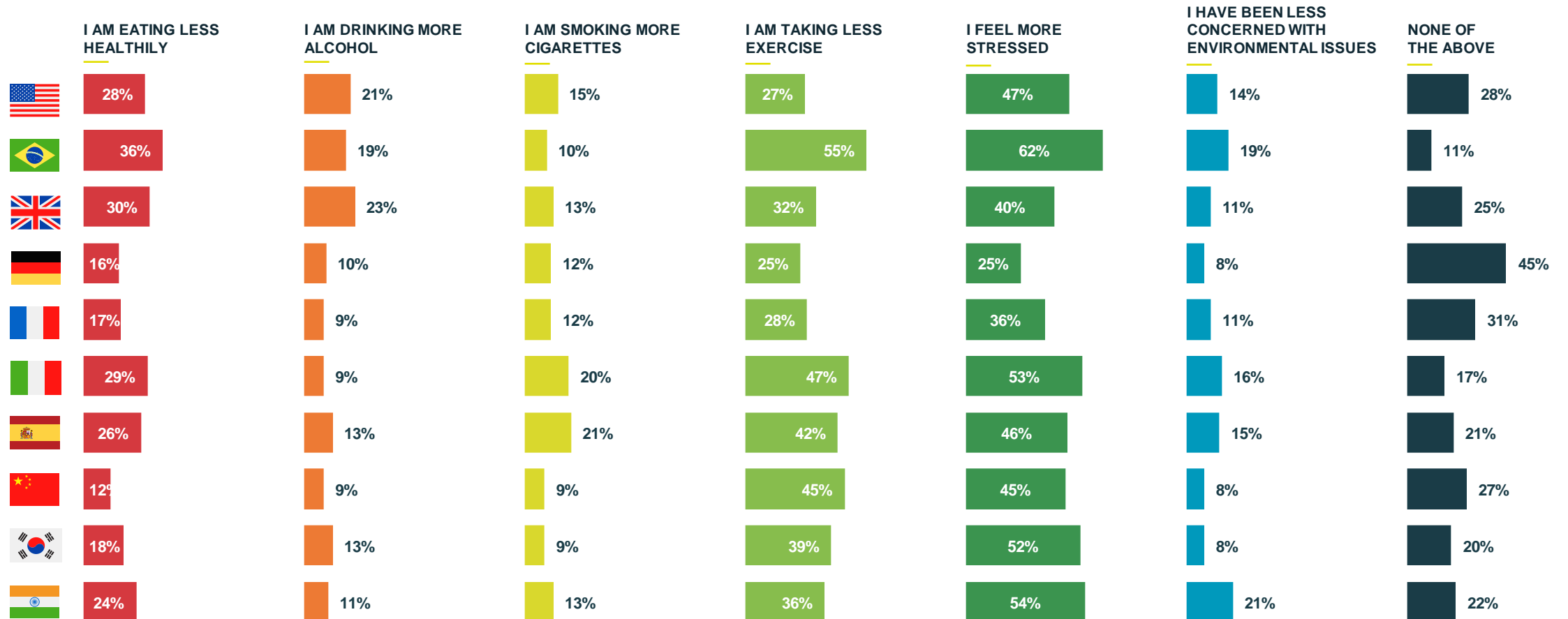
# Level of **satisfaction with life** over the past two weeks

Europeans and especially Koreans appear to be least satisfied. While the level of satisfaction in USA, Brazil, and India decreased vs. wave 1, France, Italy, Spain, and China show a positive tendency.



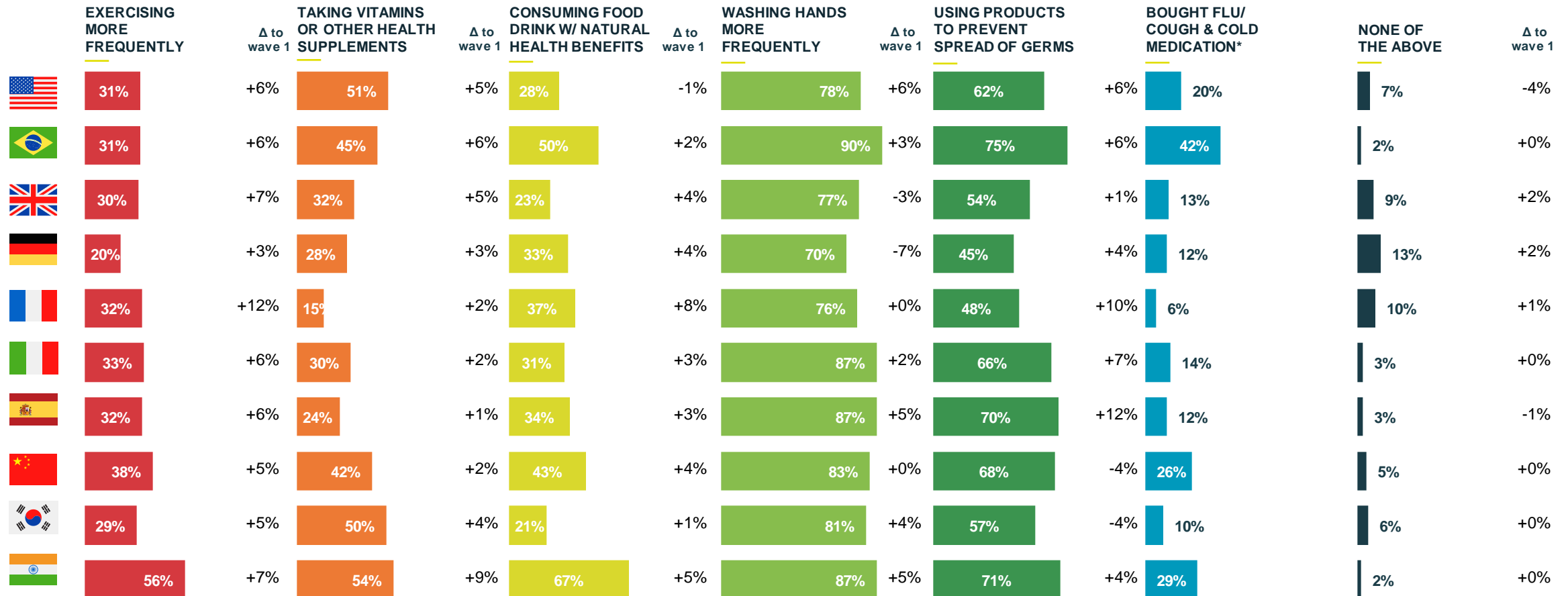
# Impact of coronavirus restrictions

The level of stress increases due to the corona restrictions, but only a low number consumes more cigarettes and alcohol. However, for German consumers the restrictions have the lowest impact compared to other countries.



# Health-related actions in the past 2 weeks due to coronavirus outbreak











The usage of products to prevent spreading of germs has increased the most compared to the first wave in European countries as well as the US and Brazil but decreased in China and South Korea. In France, respondents are exercising more frequently than in wave 1. High need for flu/cough&cold medication in Brazil.



\*no data for wave 1

# Attitudes to health and wellness following the outbreak of coronavirus

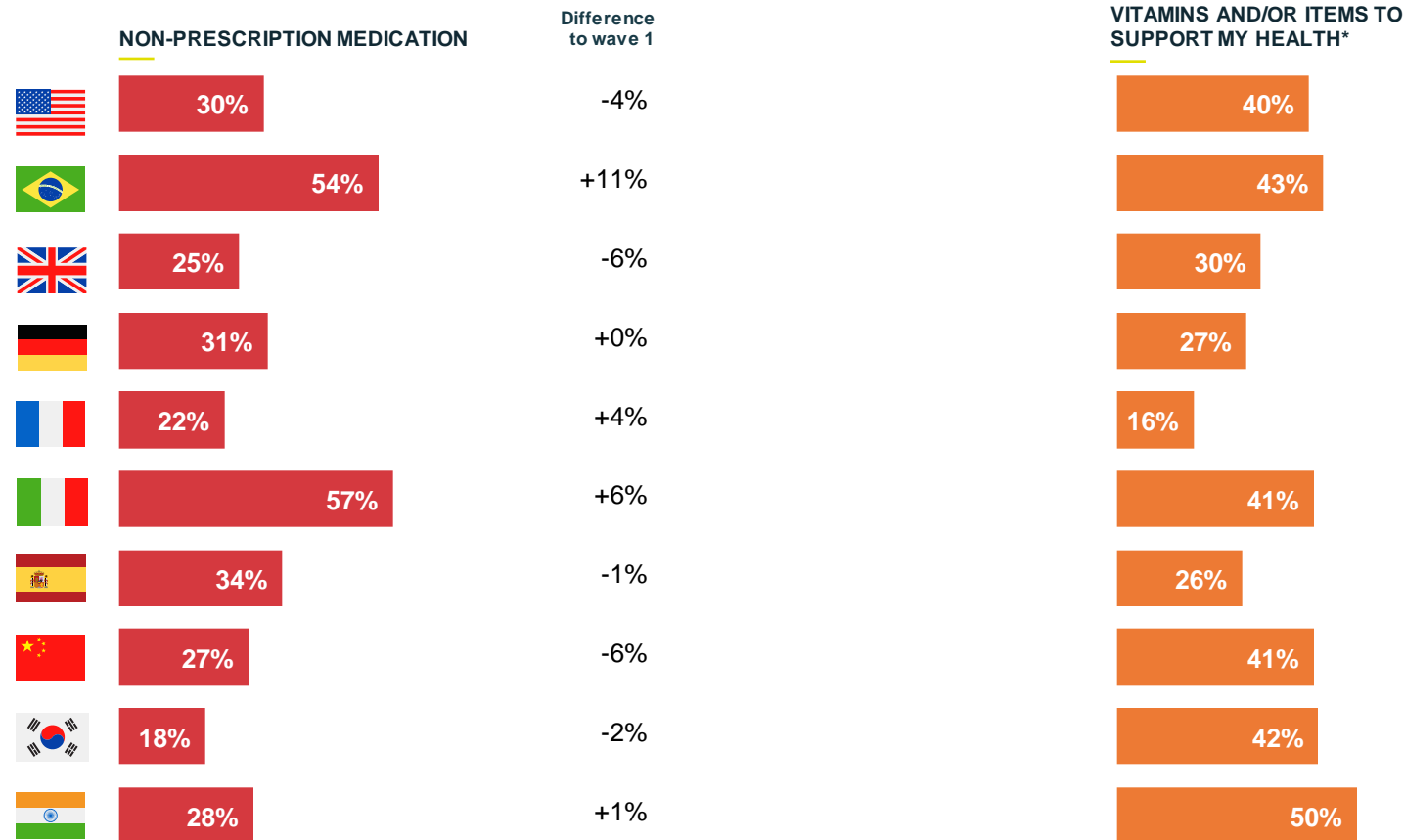
Personal health and self-care have become more important in the crisis. Countries that were hit hard by the COVID-19 pandemic like Italy, Spain and Brazil think their healthcare system should be improved to better handle future crises. Asian countries have a high confidence that a vaccine will be available soon in their countries.

										
<b>OTC-medication is a good way to stay healthy and be prepared for such crises</b>	17%	18%	14%	9%	11%	13%	12%	14%	18%	28%
Difference to wave 1	-2%	+7%	-1%	+0%	+4%	+3%	+2%	-3%	+2%	+2%
<b>I only buy medication from trusted brands</b>	21%	29%	20%	18%	8%	16%	16%	21%	19%	47%
Difference to wave 1	+0%	+7%	+3%	+3%	+2%	+4%	+1%	+3%	+5%	+11%
<b>The healthcare system in my country is not prepared to handle a health crisis</b>	31%	64%	23%	21%	39%	31%	33%	13%	8%	30%
Difference to wave 1	-3%	+11%	-7%	-11%	-2%	+3%	-3%	-1%	+1%	+2%
<b>I am confident that a vaccine will be developed and made accessible in my country</b>	39%	56%	34%	47%	37%	49%	54%	57%	52%	54%
Difference to wave 1	No data for wave 1 available									
<b>Personal health will become a bigger concern in the future</b>	40%	63%	40%	38%	34%	45%	50%	73%	66%	58%
Difference to wave 1	+5%	+16%	+5%	+5%	+8%	+4%	+10%	+6%	+10%	+14%
<b>I plan to improve my personal self-care to be better prepared for future health issues</b>	34%	55%	27%	20%	15%	26%	32%	49%	35%	58%
Difference to wave 1	+7%	+8%	+6%	+1%	+4%	+6%	+7%	+4%	+5%	+14%
<b>In the future I plan to inform myself more about how to stay well</b>	25%	35%	21%	20%	15%	20%	23%	54%	40%	53%
Difference to wave 1	+4%	+14%	+6%	+2%	+3%	+4%	+6%	+2%	+5%	+14%
<b>Hospitals and GPs should offer more Telehealth opportunities*</b>	26%	46%	29%	22%	23%	33%	34%	28%	25%	36%
Difference to wave 1	-2%	+12%	+9%	+3%	+5%	+4%	+9%	+1%	+5%	+2%
<b>Our health system should be improved to better handle future crisis situations</b>	47%	68%	45%	40%	50%	61%	60%	50%	42%	54%
Difference to wave 1	No data for wave 1 available									
<b>I am concerned about my mental health with all of the news about coronavirus</b>	27%	41%	22%	17%	11%	16%	25%	20%	21%	45%
Difference to wave 1	+5%	+7%	+0%	+0%	+2%	-3%	+1%	+3%	+0%	+11%
<b>I have used more aggressive chemicals than usual to clean my hands and home</b>	16%	20%	10%	8%	8%	21%	19%	17%	9%	26%
Difference to wave 1	+0%	+9%	+1%	+1%	+2%	+6%	+4%	+0%	-2%	+2%
<b>None of the above</b>	11%	1%	8%	12%	11%	3%	4%	4%	5%	2%
Difference to wave 1	-1%	-1%	-1%	+1%	-1%	+0%	+0%	+0%	+0%	-1%



# Health related purchases in the past 2 weeks **for myself and household**

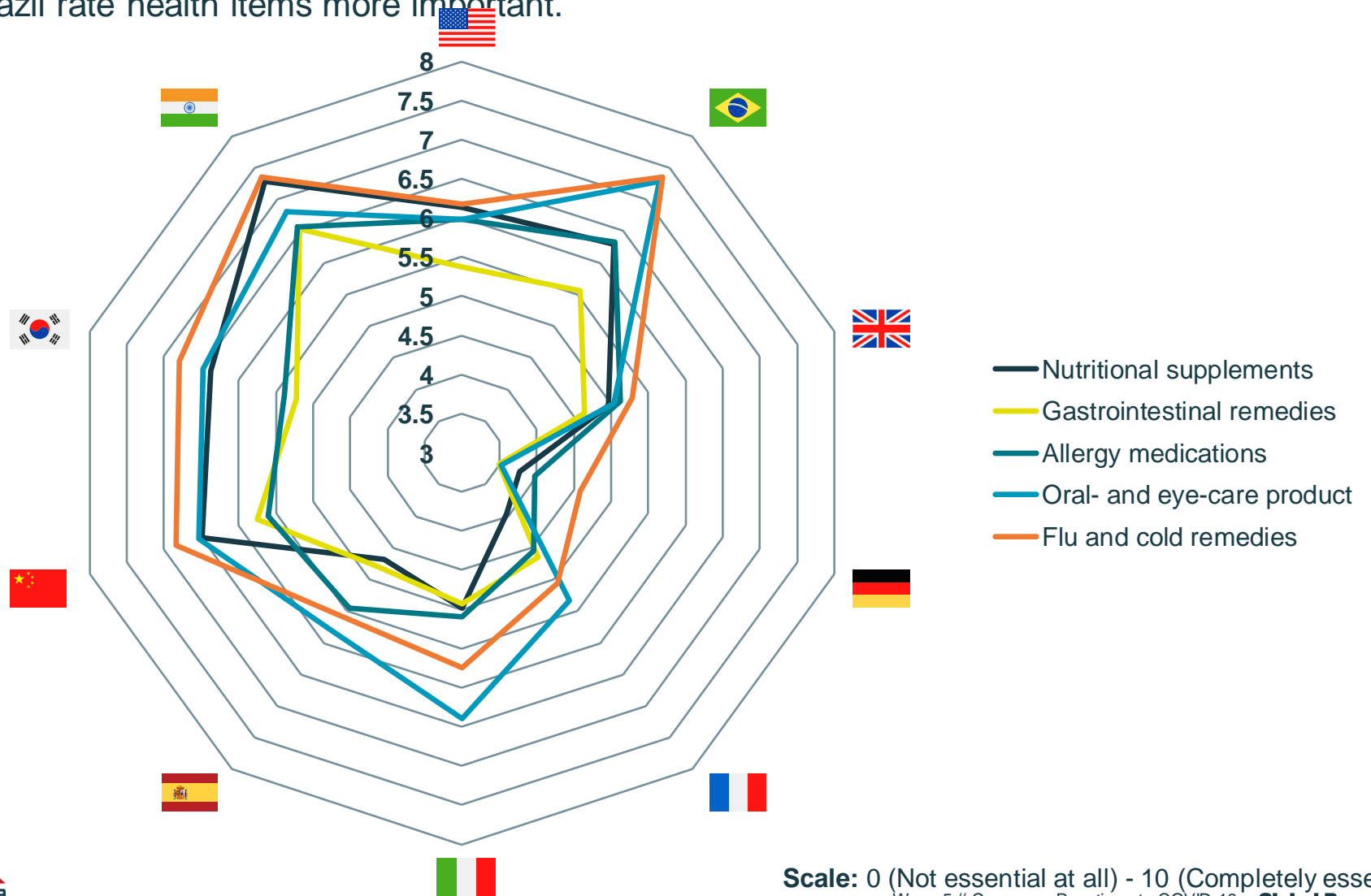
Highest purchase levels and increase of OTC medication in Brazil and Italy. In European countries the purchases of Vitamins or other items to support health are lower than in Asia and America.



\*no data for wave 1 available

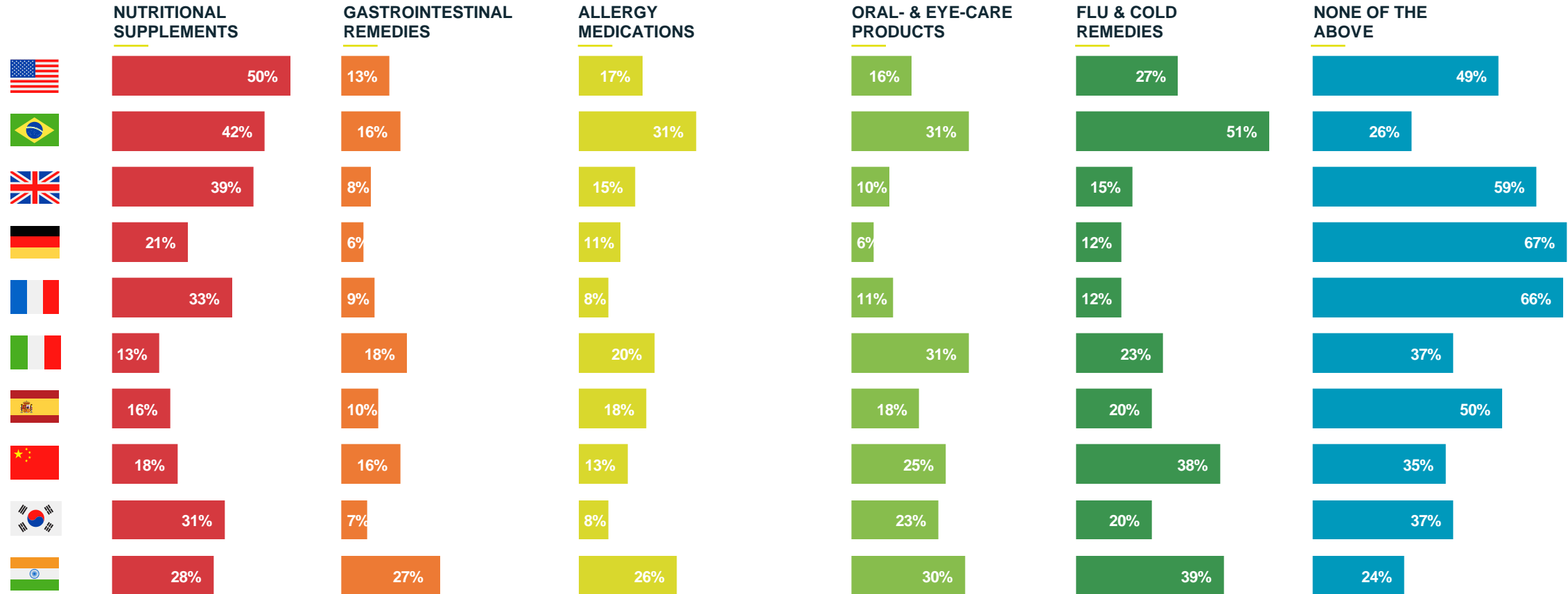
# Evaluation of importance of personal health items during the pandemic

Flu and cold remedies and oral- and eye-care products most important. Consumers from Brazil and India indicated the highest average values regarding the valuation of all personal health items. While Germany has rather low values, respondents from Asia and Brazil rate health items more important.



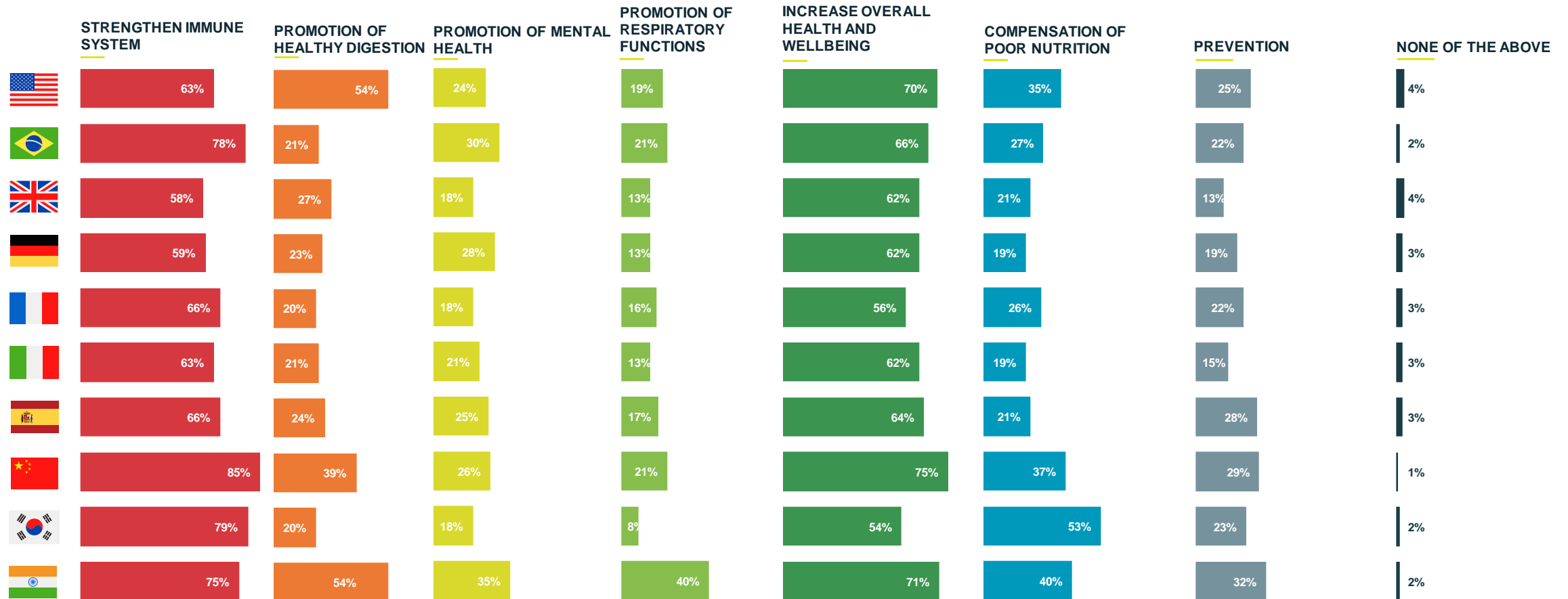
# Increased purchase behaviour of **non-prescription medication**

Overall, consumers in Britain, Germany, France, Spain and Korea showed only small increases in purchasing non-prescription medication. However, stronger sales increases in nutritional supplements as well as flu and cold remedies could be observed especially in Brazil, USA, and India.













# Reasons for taking vitamins or other health supplements

Among all countries the strengthening of the immune system and the increase of overall health were the major reasons for taking vitamins or health supplements. Most consumers in the USA and India also mentioned the promotion of a healthy digestion as a reason.













# Consuming behaviour of **nutritional supplements** in the next two weeks

People who buy nutritional supplements clearly prefer vitamins. In middle European countries the use of Magnesium is most common.

	THE AMERICAS		EUROPE					ASIA		
										
Multivitamin & Mineral Supplement	51%	37%	39%	32%	29%	41%	42%	51%	58%	50%
Vitamin A	21%	33%	19%	24%	23%	19%	21%	33%	18%	43%
Vitamin B	35%	34%	24%	44%	26%	29%	36%	41%	18%	47%
Vitamin C	53%	75%	49%	55%	53%	54%	57%	67%	51%	69%
Vitamin D	53%	60%	55%	52%	44%	43%	43%	42%	38%	58%
Calcium	28%	24%	19%	34%	14%	20%	26%	46%	27%	49%
Magnesium	19%	21%	16%	52%	43%	46%	31%	7%	20%	18%
Probiotics	24%	18%	13%	10%	20%	24%	21%	52%	40%	21%
Antioxidants	22%	19%	9%	8%	14%	22%	23%	13%	5%	33%
Coenzyme Q10	11%	5%	5%	10%	6%	5%	8%	12%	2%	8%
Omega 3 / Fish oil	29%	37%	31%	27%	20%	26%	31%	18%	42%	32%
Collagen	10%	24%	5%	6%	3%	5%	22%	27%	20%	12%
CBD	8%	2%	3%	5%	2%	1%	3%	2%	2%	7%
Cinnamon	11%	14%	8%	9%	7%	8%	13%	6%	3%	21%
Green Tea Extract	12%	14%	11%	10%	13%	7%	14%	11%	6%	37%
Ginseng	9%	7%	6%	9%	9%	10%	16%	13%	17%	17%
Ginger Root	9%	14%	9%	23%	13%	11%	20%	5%	6%	30%
Enzyme Supplement	6%	9%	3%	6%	4%	4%	4%	10%	4%	18%
None	2%	1%	3%	3%	3%	1%	0%	1%	1%	2%
Other Supplements	4%	3%	7%	7%	6%	6%	5%	0%	4%	2%

## Diagnosed health conditions

Within all countries the majority of consumers did not have any of the indications diagnosed by a healthcare professional or themselves. In Germany and the USA a small tendency for high blood pressure could be observed, while in China people have problems with a suppressed immune system.

	THE AMERICAS		EUROPE					ASIA		
										
Asthma	11%	6%	12%	8%	7%	9%	11%	3%	3%	8%
High blood pressure	26%	16%	17%	25%	14%	18%	19%	14%	17%	18%
Cardiovascular / Heart Disease	4%	3%	4%	9%	4%	6%	4%	7%	4%	5%
Chronic Obstructive Pulmonary Disease	5%	1%	4%	5%	2%	2%	2%	2%	1%	6%
Chronic liver disease	1%	1%	1%	2%	2%	2%	1%	2%	3%	5%
Suppressed immune system	5%	5%	5%	7%	3%	2%	1%	22%	3%	9%
Diabetes	13%	7%	9%	10%	8%	6%	9%	5%	7%	15%
Stroke	3%	1%	2%	3%	1%	1%	1%	2%	1%	7%
Obesity	10%	9%	7%	9%	5%	8%	12%	6%	14%	10%
Cancer	3%	1%	2%	2%	3%	1%	2%	2%	3%	4%
None of the above	50%	63%	58%	55%	66%	62%	56%	58%	63%	62%

# Perception of greater risk through health conditions

Within all countries the majority of consumers with health-issues feel more in risk because of COVID-19. Especially in Britain and Brazil consumers are worried.

## THE AMERICAS



USA

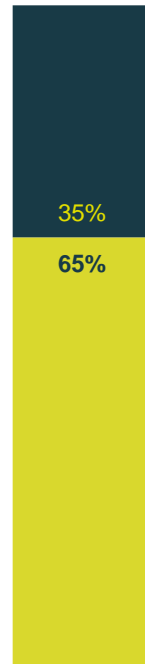


BRA

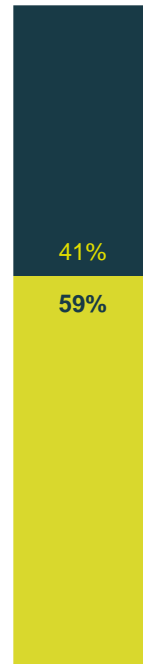


GBR

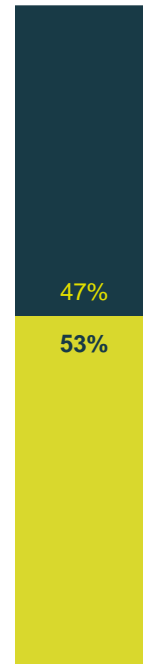
## EUROPE



DEU



FRA

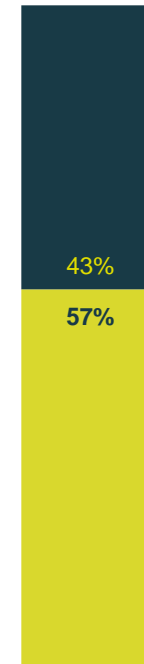


ITA

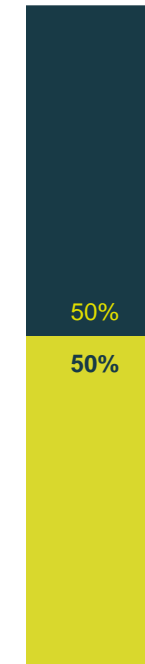


ESP

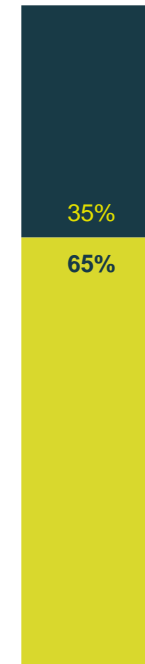
## ASIA



CHN



KOR



IND

Yes

No

# Avoidance of doctor's visit in the last two weeks

In all countries at least one quarter of all people avoid visits at the doctor to reduce their risk of getting COVID-19. In many countries like Brazil, Spain, India and Italy the amount is way higher.

## THE AMERICAS



USA



BRA



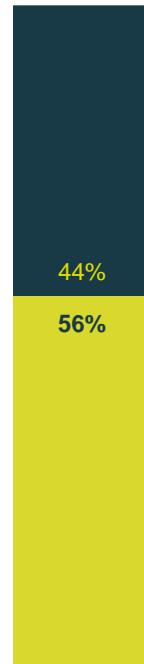
GBR



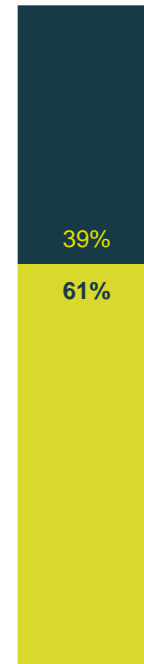
DEU



FRA

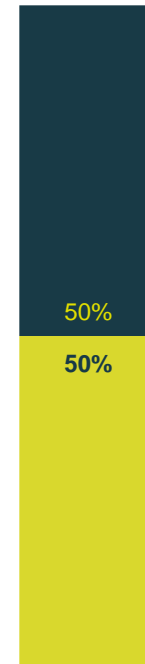


ITA

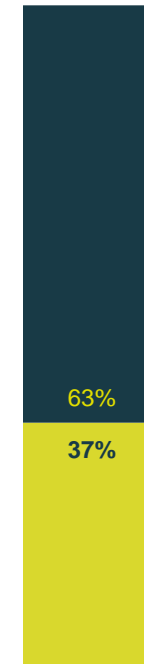


ESP

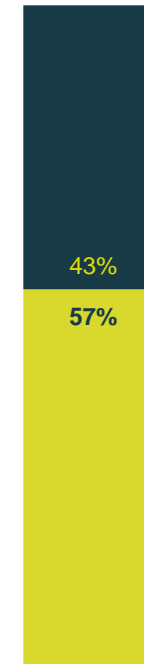
## ASIA



CHN



KOR



IND

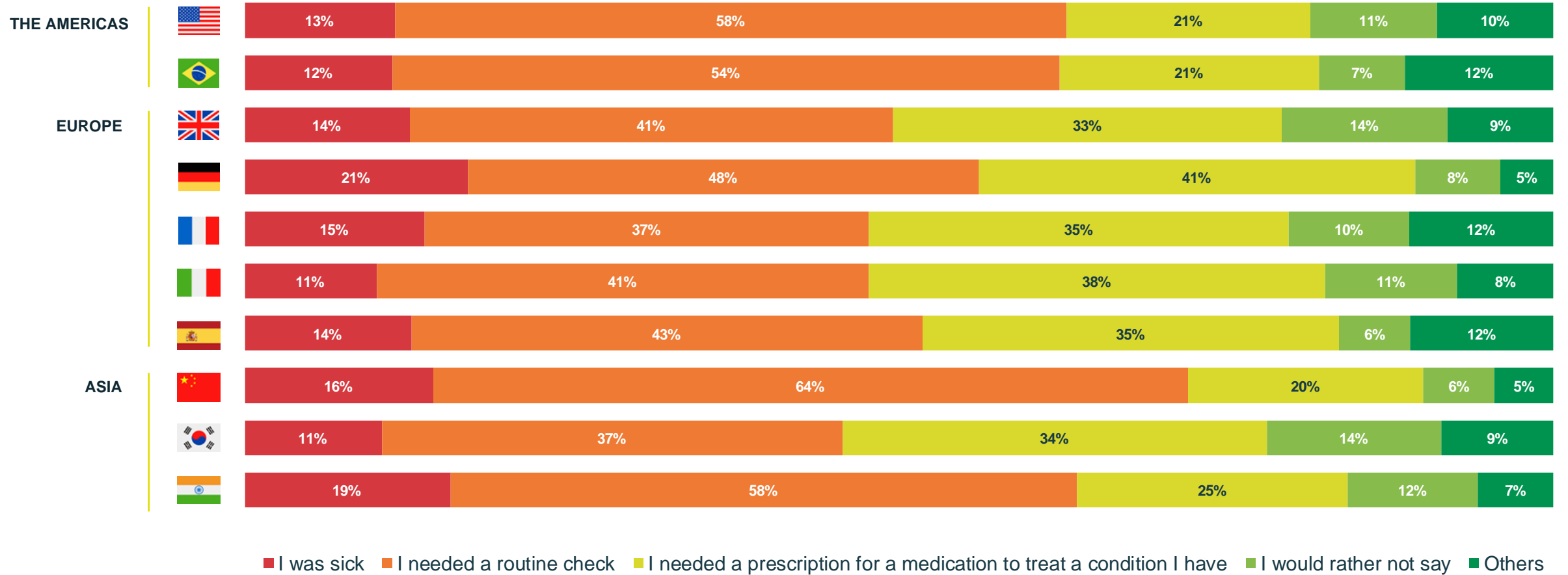
■ Yes

■ No



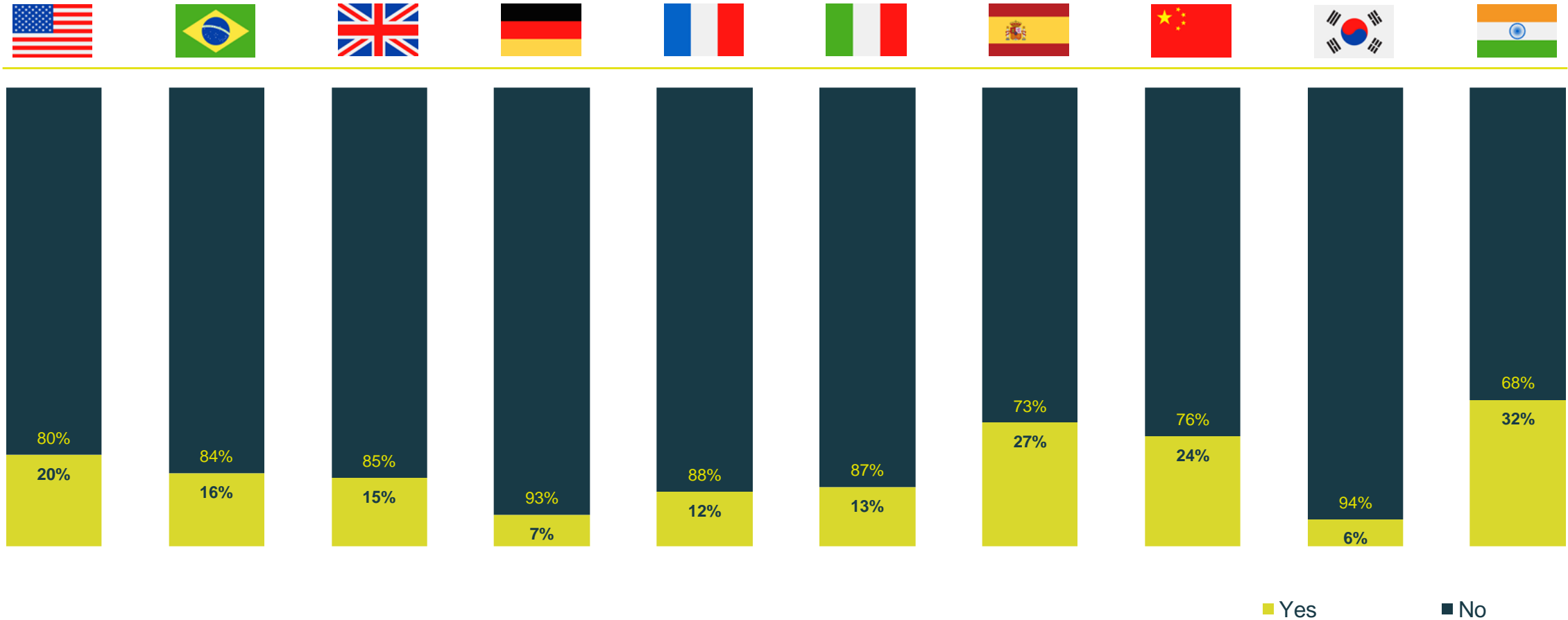
# Purpose of shifted doctor visit in the last two weeks

A routine check would have been the major reason within all countries to visit a doctor in the past two weeks.



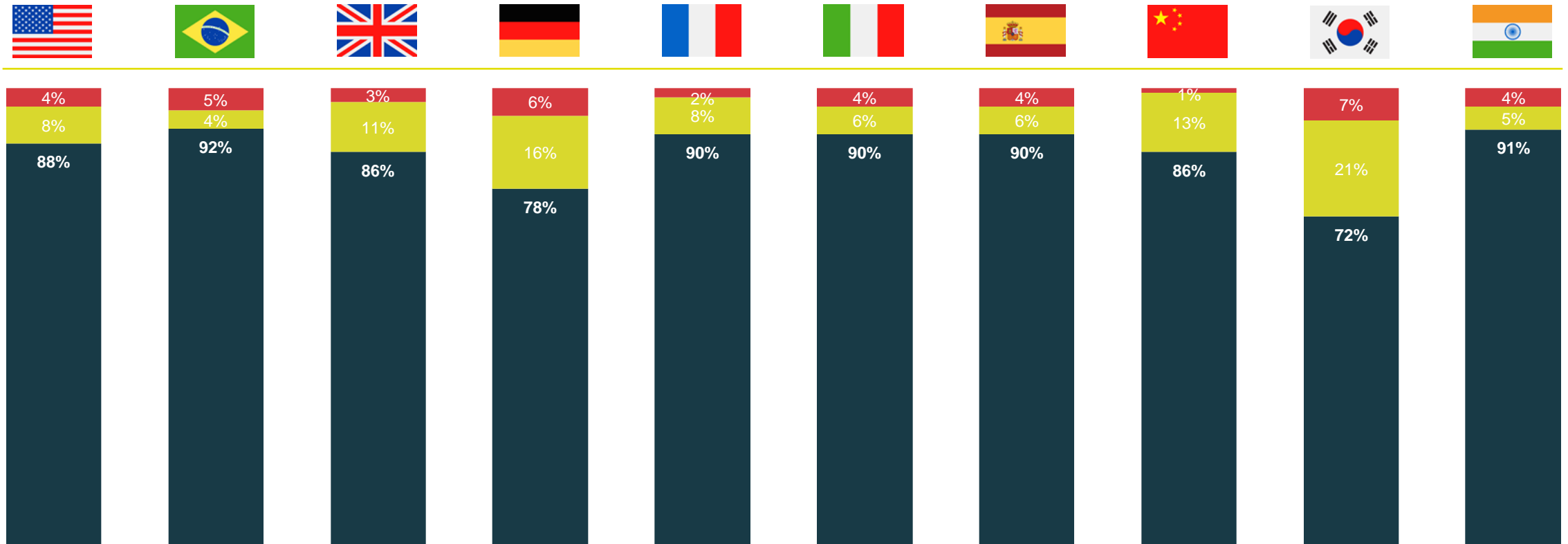
## Telemedicine appointment with doctor within past 2 weeks

While in India (34%), Spain (27%) and China (24%) telemedicine appointments seem to be more common, in Germany (7%) and South Korea (6%), only very few people had any within the last 2 weeks.



# Satisfaction with telemedicine appointment

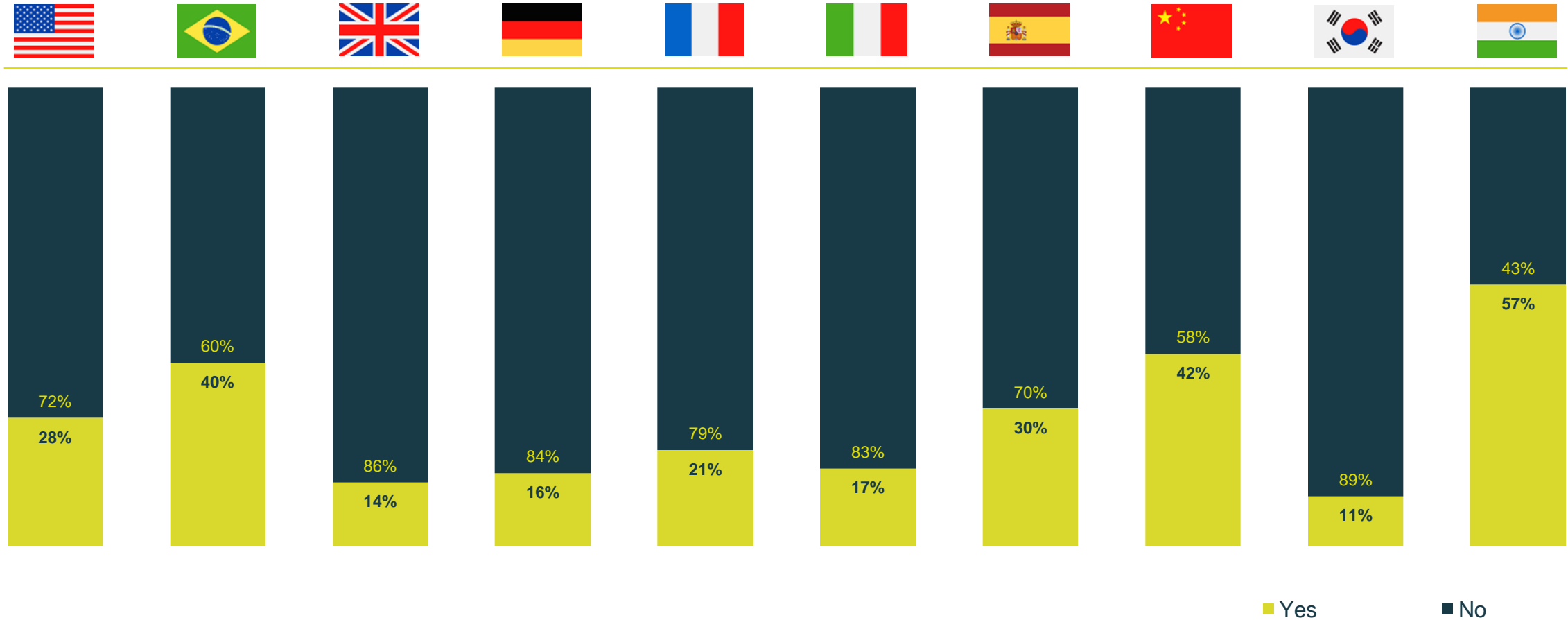
Overall very high satisfaction level with telemedicine appointments. Patients in Germany and South Korea are a little more critical.



■ (Very) satisfied   ■ Neither / nor   ■ Somewhat / very dissatisfied

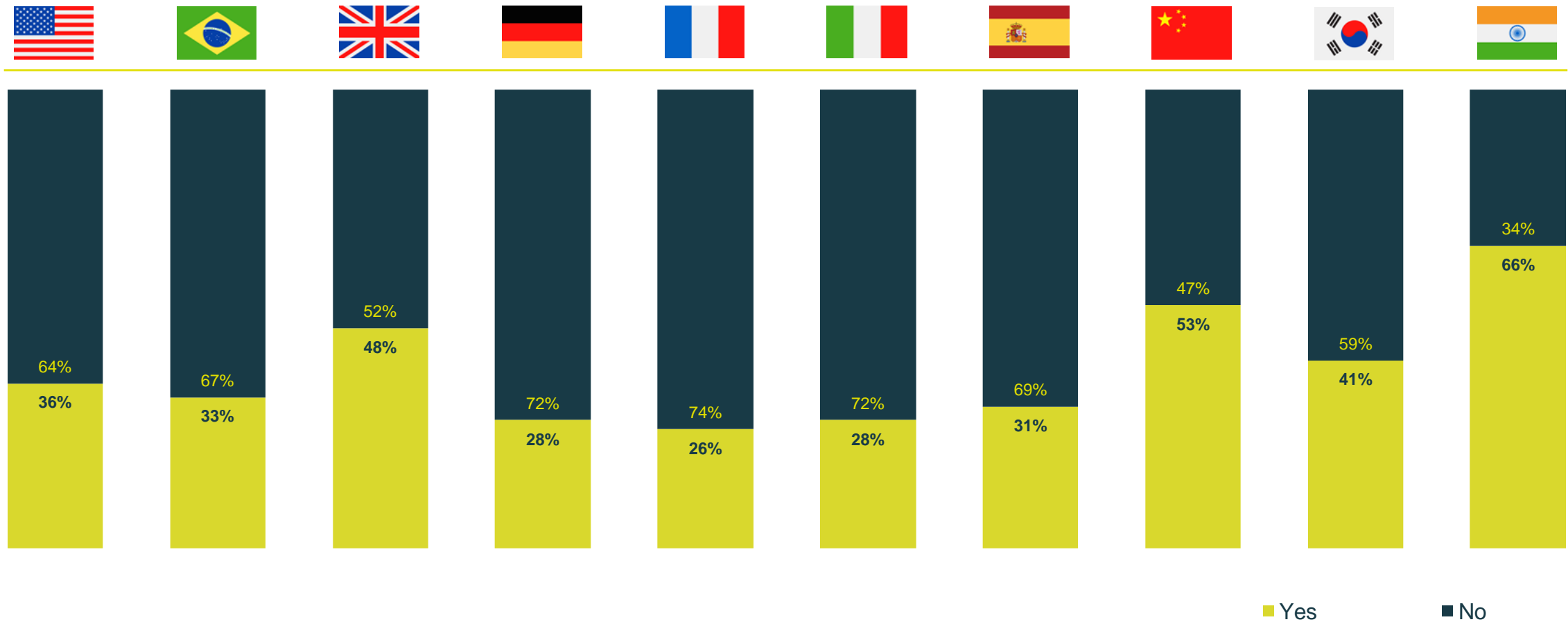
## Consultation of healthcare professional about how to protect best

Respondents in India (57%), China (42%) and Brazil (40%) consulted a healthcare professional with regard to the outbreak of coronavirus most often, while in South Korea and Europa the values are lower.



## Specific brand or product recommendation of healthcare professional

Two thirds of healthcare professionals in India and more than every second in China recommended a specific brand or product for self-medication. In most other countries only around one third or less (DE, IT, FR) has shared a specific advice.



Thank you.

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