GLOBAL BAROMETER WAVE 6

CPG/FMCG

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 6: 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	1,067	11th – 16th June 2020
France	1,072	11th – 16th June 2020
Germany	1,099	11th – 16th June 2020
Italy	1,149	11th – 16th June 2020
Spain	1,104	11th – 16th June 2020

MARKET	COMPLETED INTERVIEWS	FIELDWORK DATES
Australia	1,063	11th – 16th June 2020
Singapore	544	11th – 16th June 2020
Malaysia	549	11th – 16th June 2020
Indonesia	531	11th – 16th June 2020
Philippines	554	11th – 16th June 2020
Thailand	530	11th – 16th June 2020
Japan	1,139	11th – 16th June 2020
Korea	1,096	11th – 16th June 2020
China	1,031	11th – 16th June 2020
Hong Kong	551	11th – 16th June 2020
India	1,069	11th – 16th June 2020
UAE	523	11th – 16th June 2020

MARKET	COMPLETED INTERVIEWS	FIELDWORK DATES
United States	1,081	11th – 16th June 2020
Brazil	1,129	11th – 16th June 2020

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Consequences of not being able to access products or services as normal

In Japan there are fewer consequences of not being able to access products and services. Philippines, India and Thailand seem to have greater consequences.

	EUROPE					THE AMERICAS		ASIA												
	GBR	FRA	DEU	ITA	ESP	USA	BRA	AUS	SGP	MYS	IDN	PHL	THA	JPN	KOR	CHN	HKG	IND	UAE
Tried a new product	27%	22%	19%	28%	35%	30%	42%	28%	36%	41%	40%	54%	36%	14%	14%	22%	26%	47%	41%
Tried buying from a new brand	25%	20%	23%	19%	29%	29%	43%	23%	29%	33%	37%	47%	39%	8%	9%	21%	29%	44%	33%
Had to shop around for something in physical stores	23%	22%	18%	26%	25%	26%	29%	27%	25%	35%	27%	32%	33%	17%	21%	13%	44%	34%	29%
Had to shop around for something online	33%	23%	32%	43%	19%	32%	49%	21%	42%	43%	44%	55%	58%	19%	49%	25%	51%	40%	37%
Shopped in a physical store for something I'd usually buy online	7%	8%	5%	6%	8%	11%	9%	10%	15%	19%	17%	16%	21%	6%	9%	15%	12%	34%	20%
Shopped online for something I'd usually buy in a physical store	42%	21%	23%	38%	33%	41%	45%	26%	50%	52%	52%	64%	50%	25%	34%	50%	37%	50%	46%
Paid more for something than I usually would	36%	30%	23%	39%	36%	39%	44%	30%	41%	35%	32%	47%	16%	29%	18%	22%	26%	54%	38%
Paid less for something than I usually would	9%	9%	7%	8%	8%	11%	16%	12%	16%	19%	26%	28%	33%	5%	10%	13%	18%	21%	24%
Gone without something I'd usually buy	40%	23%	15%	32%	26%	41%	34%	31%	33%	24%	21%	30%	12%	16%	13%	32%	13%	34%	25%

Lowest scoring country for each measure   Highest scoring country for each measure

Consequences of not being able to access products or services as normal

Logically, online shopping is among the biggest consequences of not being able to access products or services around the world. In more than half of markets observed (Europe, Americas, even in Asia: Australia, Singapore, Japan…) many people are paying more than usual for products.

	EUROPE					THE AMERICAS		ASIA											
Shopped online for something I'd usually buy in a physical store	42%	21%	23%	38%	33%	41%	45%	26%	50%	52%	52%	64%	50%	25%	34%	50%	37%	50%	46%
Had to shop around for something online	33%	23%	32%	43%	19%	32%	49%	21%	42%	43%	44%	55%	58%	19%	49%	25%	51%	40%	37%
Paid more for something than I usually would	36%	30%	23%	39%	36%	39%	44%	30%	41%	35%	32%	47%	16%	29%	18%	22%	26%	54%	38%
Tried a new product	27%	22%	19%	28%	35%	30%	42%	28%	36%	41%	40%	54%	36%	14%	14%	22%	26%	47%	41%
Tried buying from a new brand	25%	20%	23%	19%	29%	29%	43%	23%	29%	33%	37%	47%	39%	8%	9%	21%	29%	44%	33%
Gone without something I'd usually buy	40%	23%	15%	32%	26%	41%	34%	31%	33%	24%	21%	30%	12%	16%	13%	32%	13%	34%	25%
Had to shop around for something in physical stores	23%	22%	18%	26%	25%	26%	29%	27%	25%	35%	27%	32%	33%	17%	21%	13%	44%	34%	29%
Paid less for something than I usually would	9%	9%	7%	8%	8%	11%	16%	12%	16%	19%	26%	28%	33%	5%	10%	13%	18%	21%	24%
Shopped in a physical store for something I'd usually buy online	7%	8%	5%	6%	8%	11%	9%	10%	15%	19%	17%	16%	21%	6%	9%	15%	12%	34%	20%
None of the above	17%	29%	33%	13%	18%	16%	8%	27%	7%	7%	7%	3%	3%	36%	21%	16%	6%	3%	7%

3 highest scores per market

Willingness to buy a similar product from a different brand if a preferred brand isn't available

Consumers in China (and Hong Kong) are less likely to buy a different brand in the same category compared to the start of the pandemic, whilst willingness to buy another brand is increasing in the UK, Spain, Australia, Singapore and the US.

	EUROPE					THE AMERICAS		ASIA												
Personal toiletries	39%	44%	41%	45%	50%	41%	48%	43%	47%	34%	50%	39%	50%	21%	29%	25%	34%	43%	42%
Household cleaning products	34%	37%	33%	41%	41%	36%	41%	36%	42%	40%	47%	41%	48%	20%	27%	27%	26%	47%	43%
Vitamins and supplements*	27%	28%	26%	36%	30%	37%	38%	38%	44%	41%	51%	50%	46%	23%	31%	26%	25%	48%	42%
Soft drinks	35%	37%	31%	36%	47%	38%	38%	33%	39%	34%	40%	34%	41%	23%	24%	24%	24%	43%	43%
Paper goods (e.g. toilet paper, kitchen roll, baby wipes)	34%	34%	34%	36%	39%	41%	40%	38%	36%	34%	44%	33%	45%	20%	29%	23%	32%	36%	37%
Alcoholic drinks	34%	37%	33%	31%	42%	28%	37%	39%	33%	20%	15%	27%	29%	26%	27%	21%	23%	27%	26%

At least 5% lower than 1st wave

At least 5% higher than 1st wave

*Not asked in Wave 1

Alternatives if not able to get one's preferred product from the usual shopping place

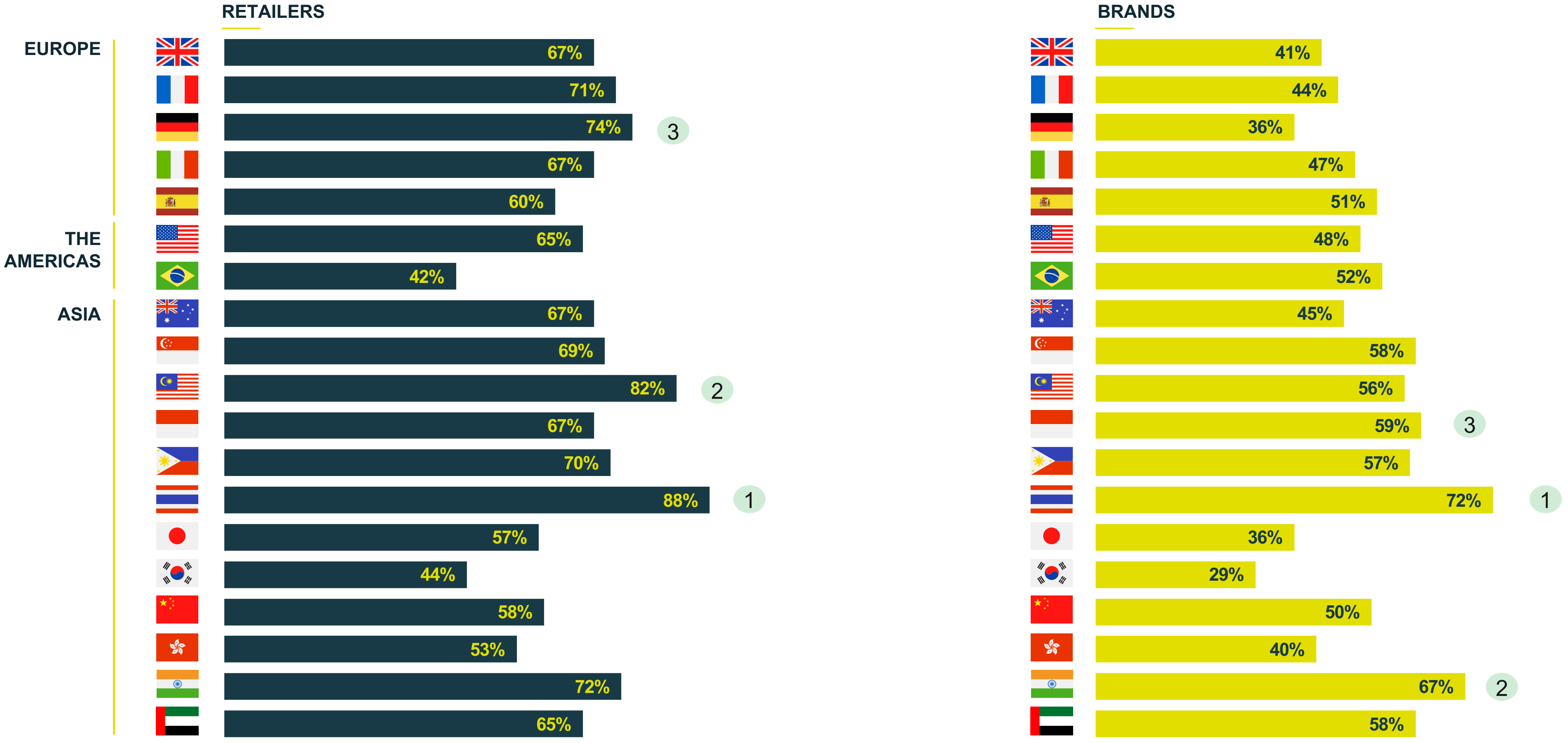
Except UK, the European markets have become more willing to seek an alternative physical retailer while Asian markets are more willing to seek an online alternative. The highest levels of willingness to go directly to the product manufacturer remains in the USA and Thailand.

	VISIT AN ALTERNATIVE PHYSICAL RETAILER	Difference from 1st wave	VISIT AN ALTERNATIVE ONLINE RETAILER	Difference from 1st wave	GO DIRECTLY TO THE PRODUCT MANUFACTURER	Difference from 1st wave
EUROPE	61%	-16	57%	15	14%	1
	72%	4	32%	2	13%	-2
	75%	1	44%	=	15%	=
	67%	4	50%	-3	9%	-1
	75%	-1	47%	8	12%	=
THE AMERICAS	60%	-12	52%	=	22%	-3
	48%	-6	65%	6	11%	-4
ASIA	74%	-10	37%	-3	16%	=
	63%	-3	70%	9	18%	-5
	60%	-3	70%	6	12%	1
	70%	=	67%	3	13%	-3
	64%	-17	71%	25	11%	-1
	56%	-4	74%	-2	31%	2
	73%	-9	51%	2	7%	1
	42%	-6	75%	-3	8%	1
	50%	-5	81%	1	11%	-1
	75%	-1	55%	-7	13%	-3
	62%	-7	72%	5	18%	-4
	65%	4	57%	-3	17%	-3

*Note – charts are not in proportion to each other by habit

Are you getting sufficient communications about safety measures put in place to provide reassurance about Coronavirus?

Consumers generally feel sufficiently communicated with about safety measures from brands and retailers. Agreement that communication has been sufficient from both of these is highest in Asian markets (Thailand, Malaysia, Indonesia, Singapore, Philippines and India), while in Brazil and Korea, retailers could make some improvements.

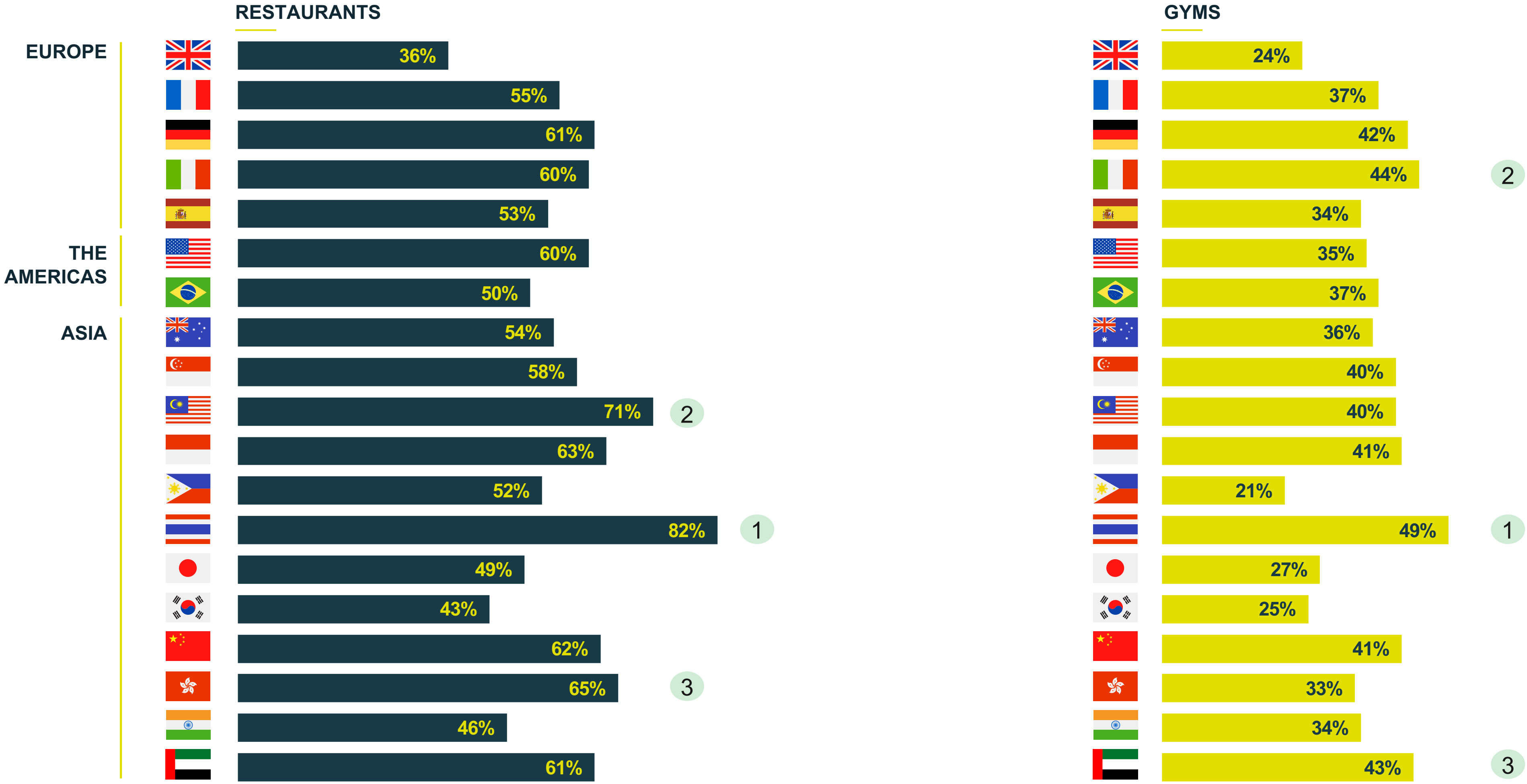


3 highest scores per market

*Note – charts are not in proportion to each other by habit

Are you getting sufficient communications about safety measures put in place to provide reassurance about Coronavirus?

Consumer opinions around the communications received from restaurants is mixed across markets, with the UK least likely to find them sufficient. Generally, the majority feel that they have not received sufficient communication about safety measures from gyms – more is needed to reassure consumers as they begin to re-open.



3 highest scores per market

*Note – charts are not in proportion to each other by habit

Are you getting sufficient communications about safety measures put in place to provide reassurance about Coronavirus?

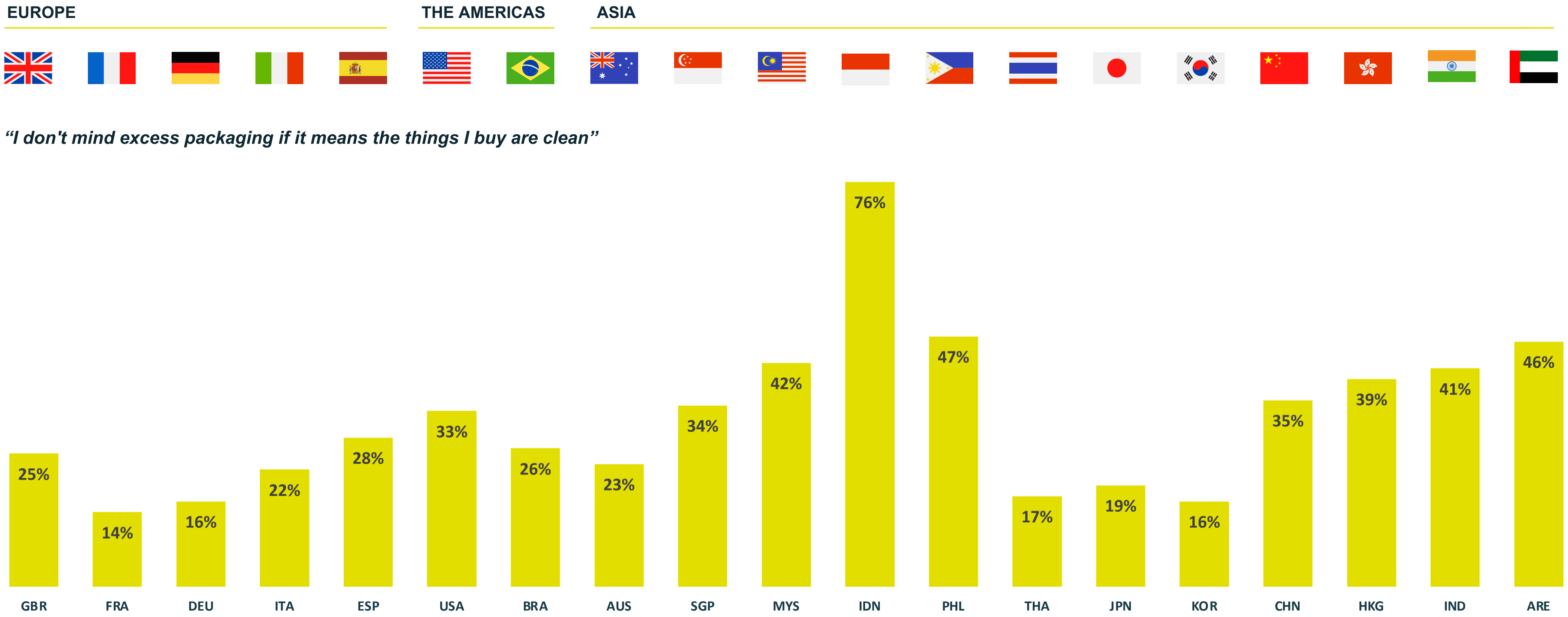
For hairdressers and beauty salons, consumers in Thailand and Italy feel the most reassured about safety measures through the communications provided, while the UK and the Philippines have the lowest scores.

3 highest scores per market

*Note – charts are not in proportion to each other by habit

Health before preservation of the environment

While European countries are less willing to have excess packaging on products, respondents in Asia are more inclined to accept this (especially in Indonesia, where 3 out of 4 don't mind).




Thank you
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