

GLOBAL BAROMETER:

# Consumer Reactions to COVID-19

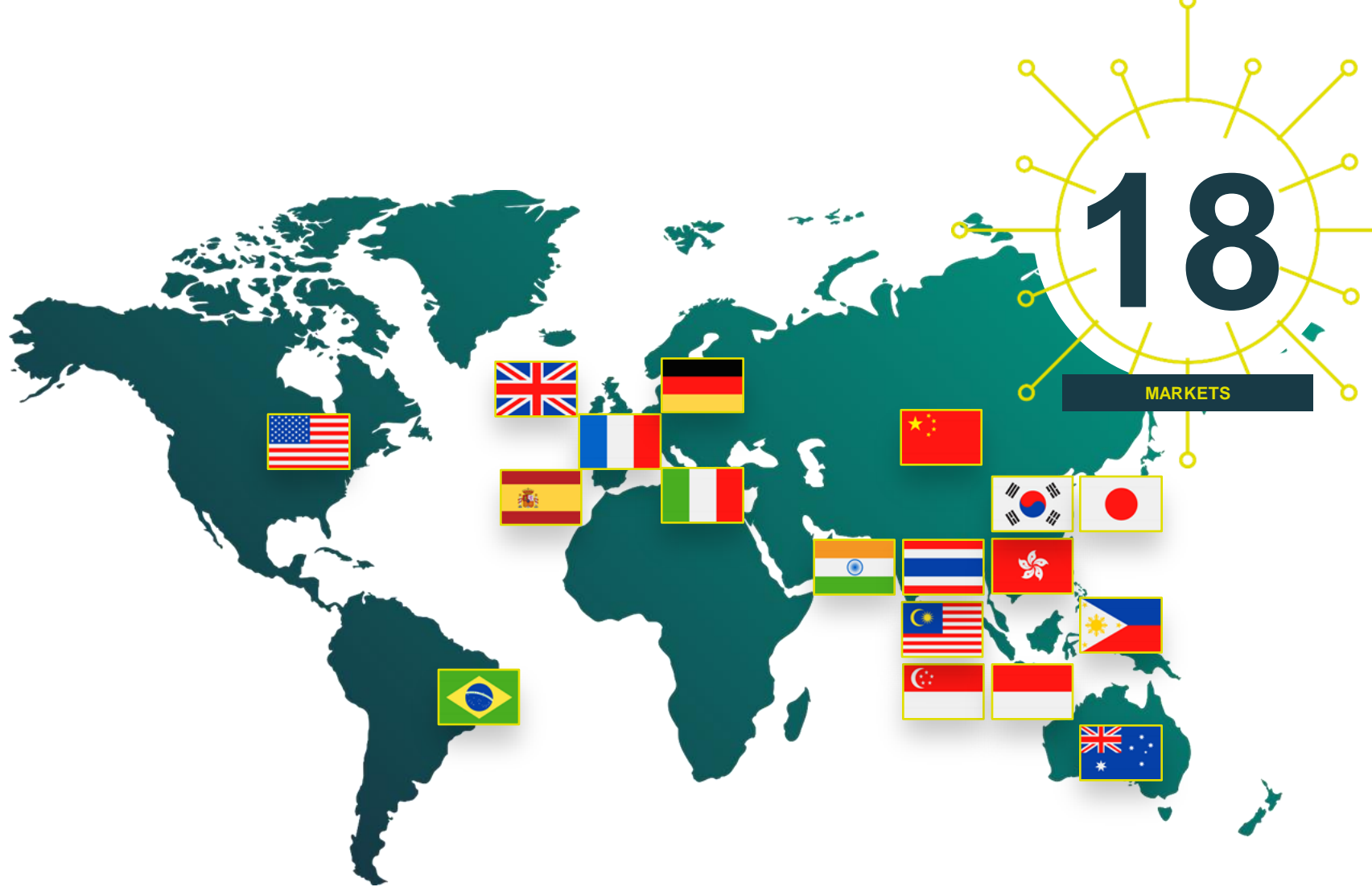
# About this study

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

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


**This initial report covers 18 markets.**

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





# Markets studied and field schedule

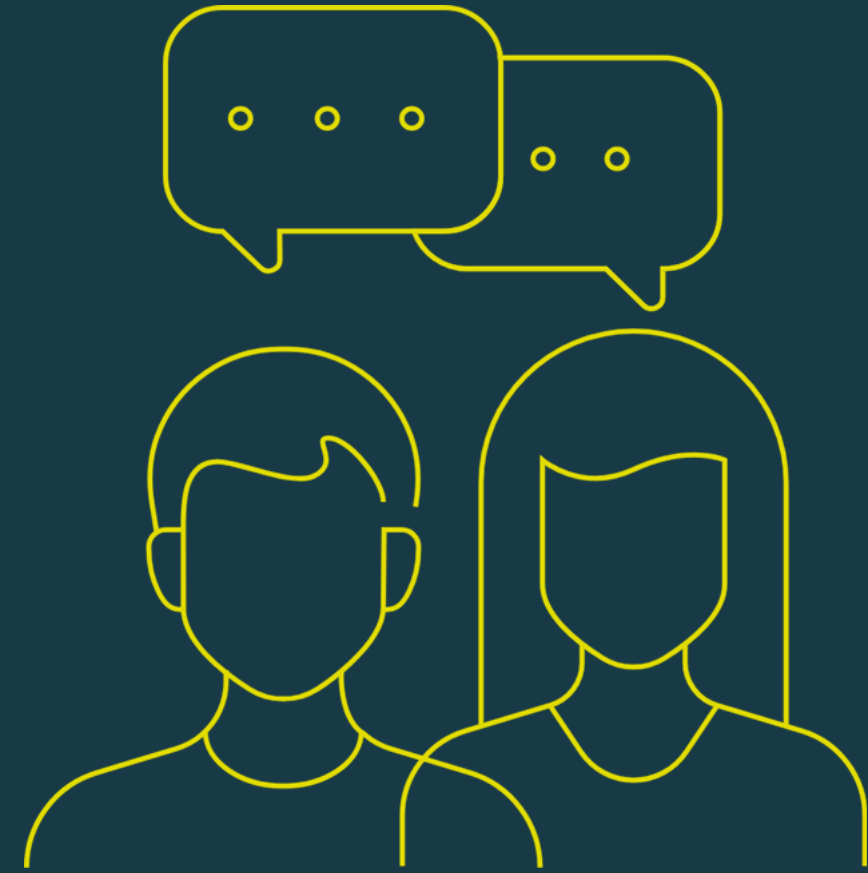
Below is the field schedule and number of completed interviews by market included in this wave of research. Data has been weighted by age and gender to be Census representative in all markets (except India, where we're Internet representative).

	MARKET	COMPLETED INTERVIEWS	FIELDWORK DATES
	UK	<b>1,276</b>	25th – 27th March 2020
	France	<b>1,044</b>	30th March – 1st April 2020
	Germany	<b>1,046</b>	30th March – 1st April 2020
	Italy	<b>1,109</b>	30th March – 1st April 2020
	Spain	<b>1,050</b>	30th March – 2nd April 2020

	MARKET	COMPLETED INTERVIEWS	FIELDWORK DATES
	Australia	<b>1,050</b>	25th – 27th March 2020
	Singapore	<b>547</b>	25th – 27th March 2020
	Malaysia	<b>491</b>	30th March – 3rd April 2020
	Indonesia	<b>548</b>	30th March – 3rd April 2020
	Philippines	<b>530</b>	30th March – 3rd April 2020
	Thailand	<b>633</b>	30th March – 3rd April 2020
	Japan	<b>1,093</b>	30th March – 1st April 2020
	Korea	<b>1,034</b>	30th March – 1st April 2020
	China	<b>956</b>	30th March – 3rd April 2020
	Hong Kong	<b>538</b>	30th March – 3rd April 2020
	India	<b>1,004</b>	25th – 27th March 2020

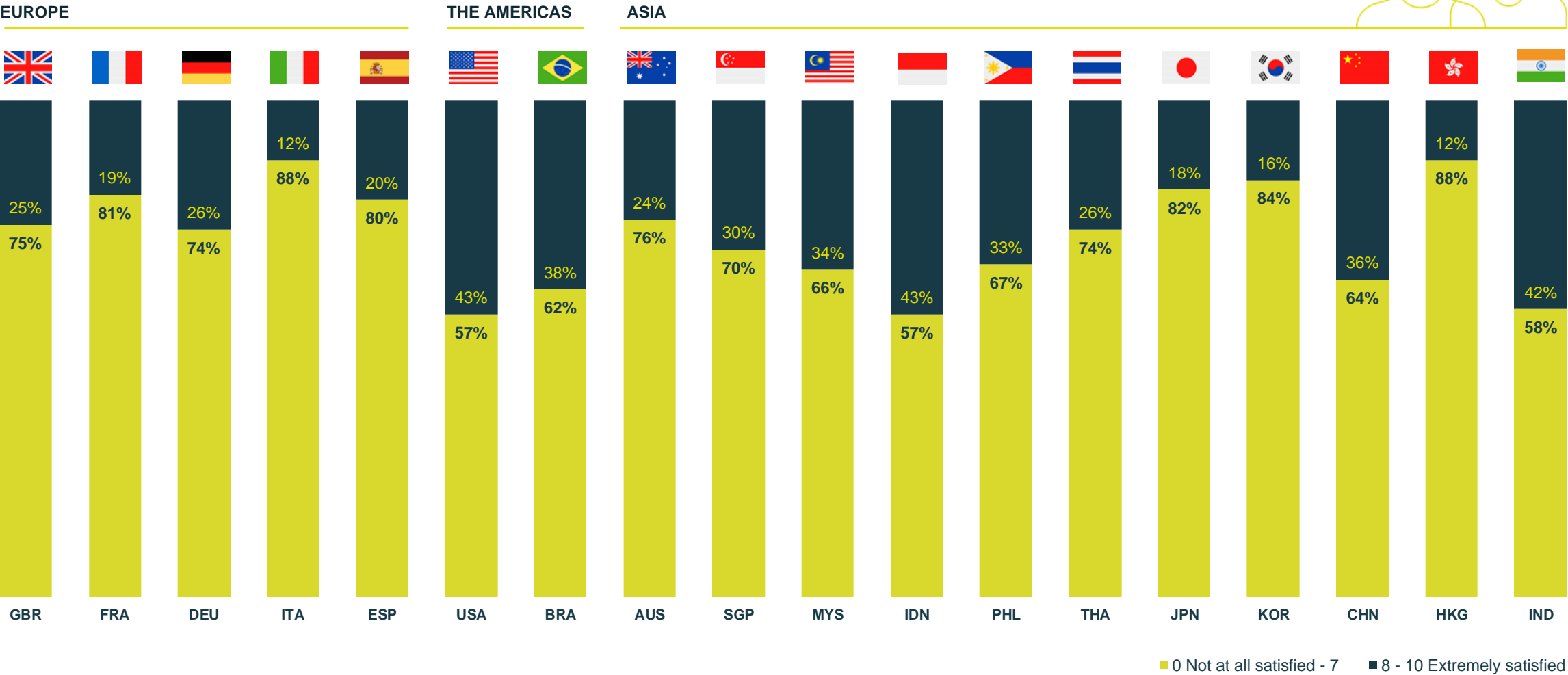
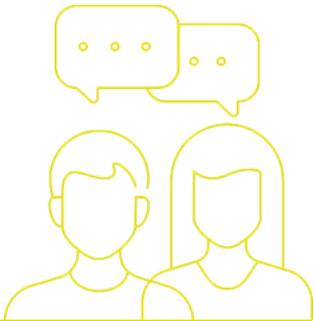
	MARKET	COMPLETED INTERVIEWS	FIELDWORK DATES
	United States	<b>1,081</b>	25th – 27th March 2020
	Brazil	<b>1,076</b>	30th March – 2nd April 2020

# Consumers reactions to the Coronavirus



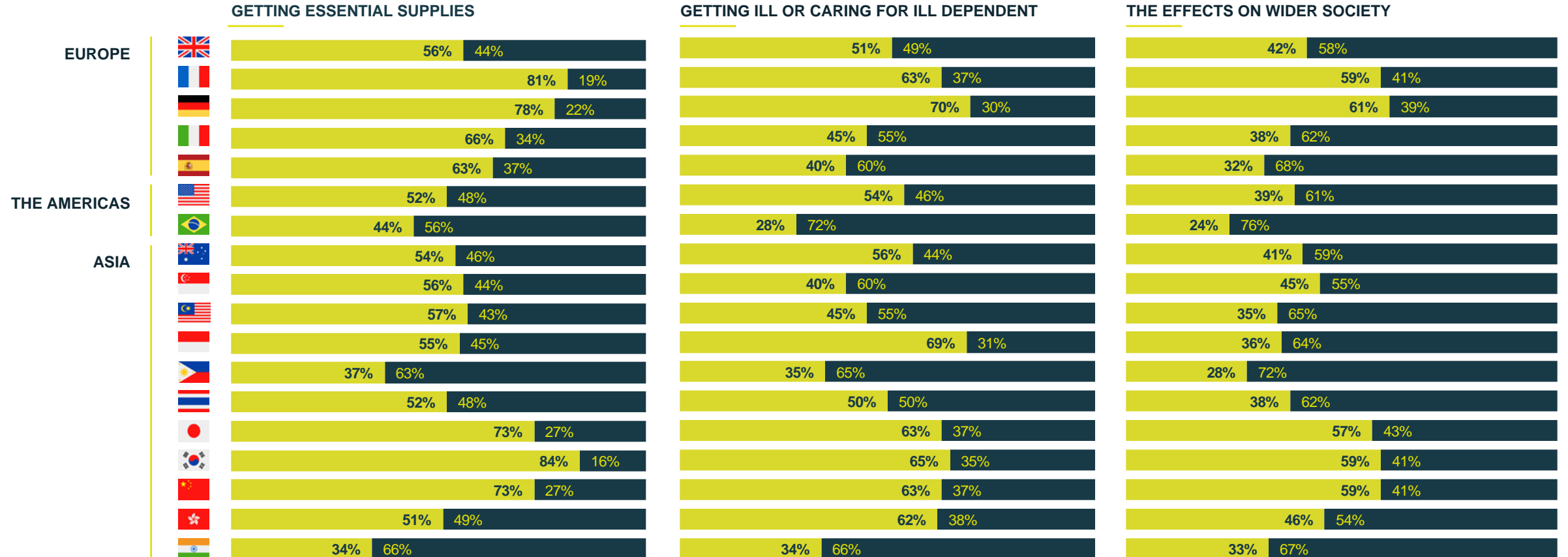
# Level of satisfaction with life over the past 2 weeks

Italy and Hong Kong appear to be least satisfied with their lives at the moment, this contrasts starkly with the USA where people are almost four times more likely to be satisfied



# Level of concern with different aspects because of the Coronavirus

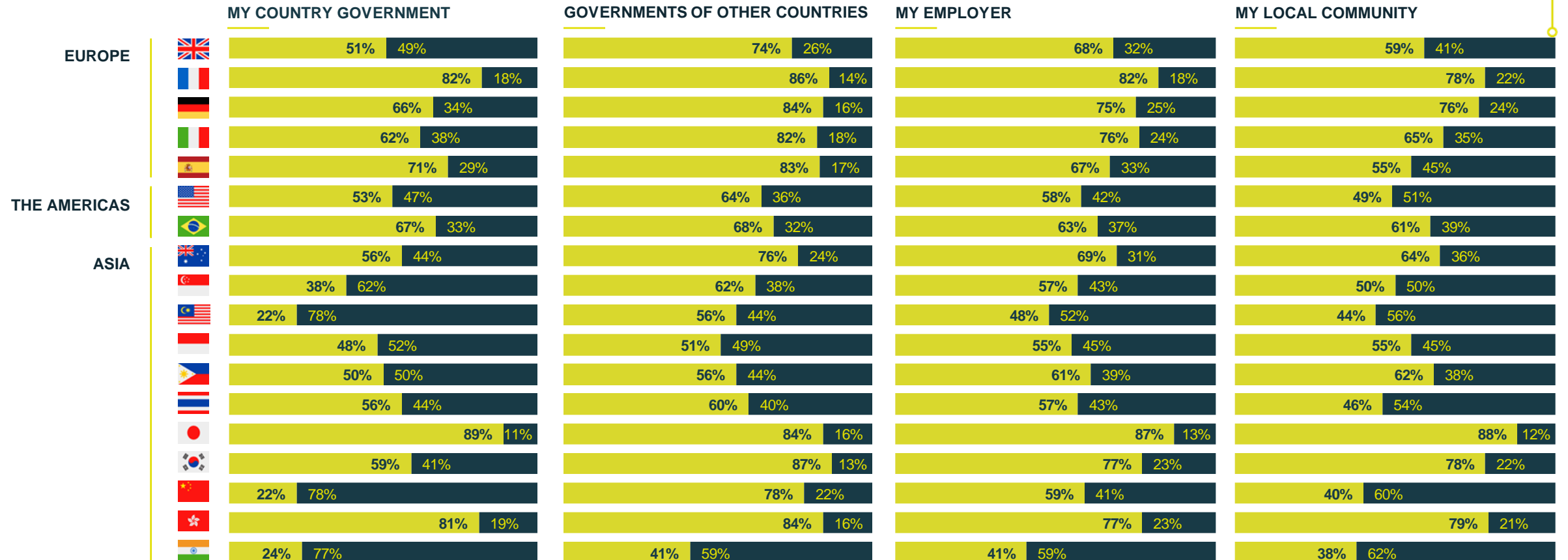
There are high levels of concern around the world over getting essential supplies, caring for dependents and the impact on society, such as healthcare and children's education



■ 0 Not at all concerned - 7 ■ 8 - 10 Extremely concerned

# Level of support given in response to the Coronavirus outbreak

The French and Japanese governments are seen as especially unsupportive, as are their employers and local communities.

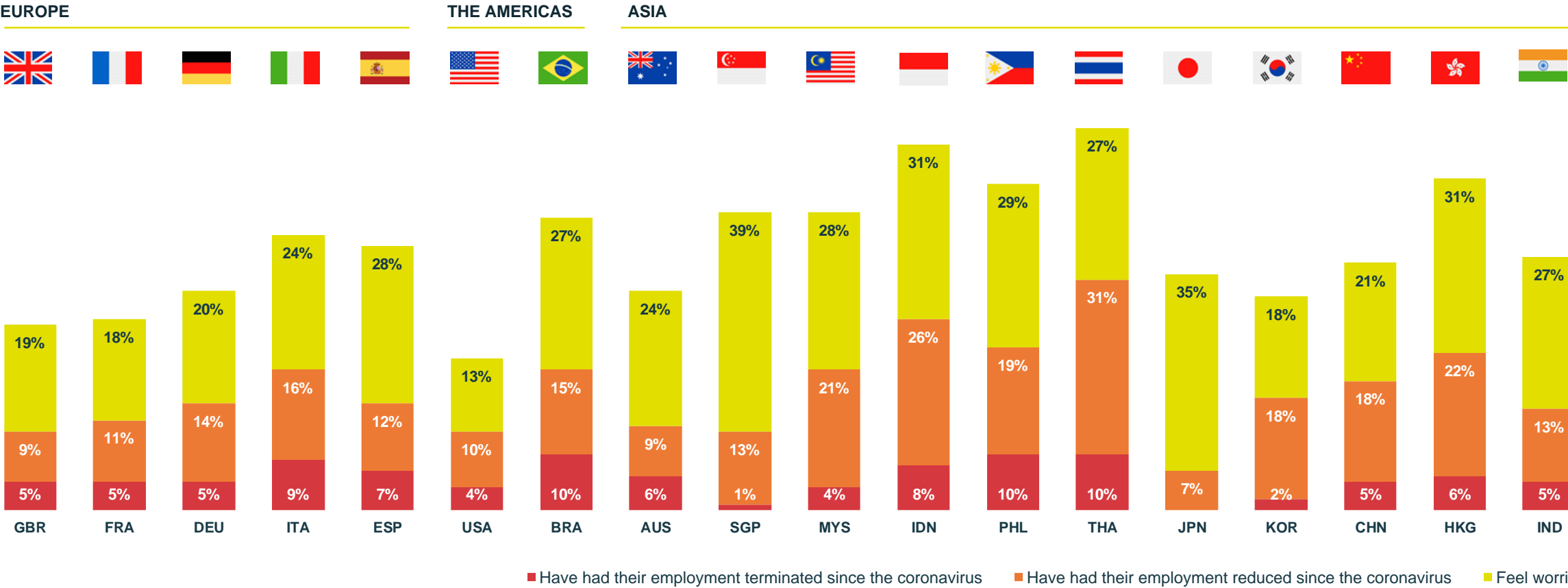


■ 0 Not at all concerned - 7 ■ 8 - 10 Extremely concerned



# Perceived level of security in employment over the past 2 weeks

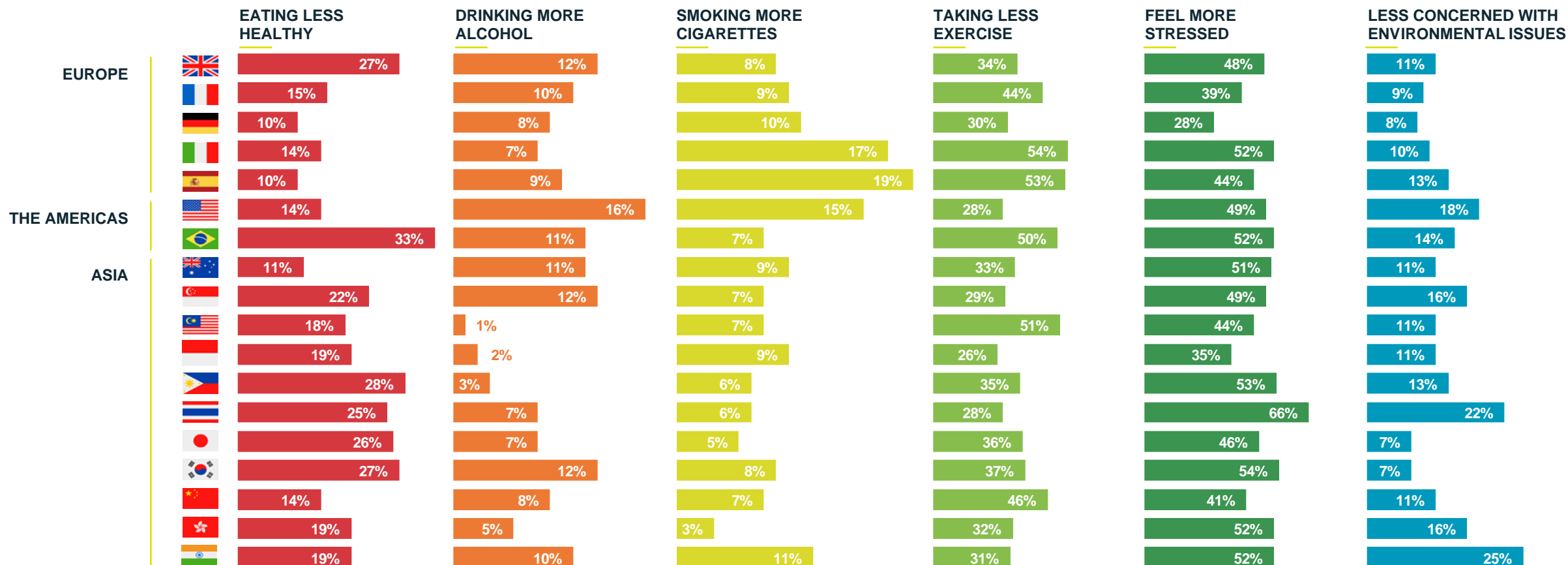
It is clear that the impact of coronavirus on employment security is a massive issue everywhere with large numbers of people affected or concerned





# Coronavirus restrictions **knock-on effects**

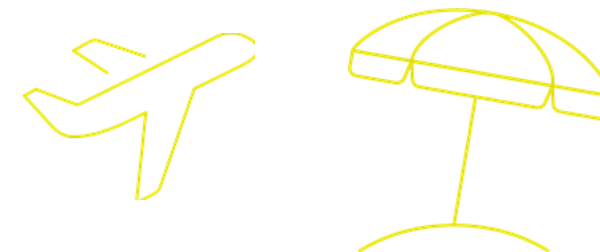
Levels of increased stress are high throughout the world at this time and whilst we see a good number of people taking more exercise to combat this, we also see increases in unhealthy eating, smoking, drinking as well as people less concerned with the environment



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

# Activities likely to undertake once the Coronavirus crisis is over

Looking ahead to when this is all over, people are certainly expecting to behave differently, with many looking forward to going out more and treat themselves whilst others are thinking of how to better prepare for the future



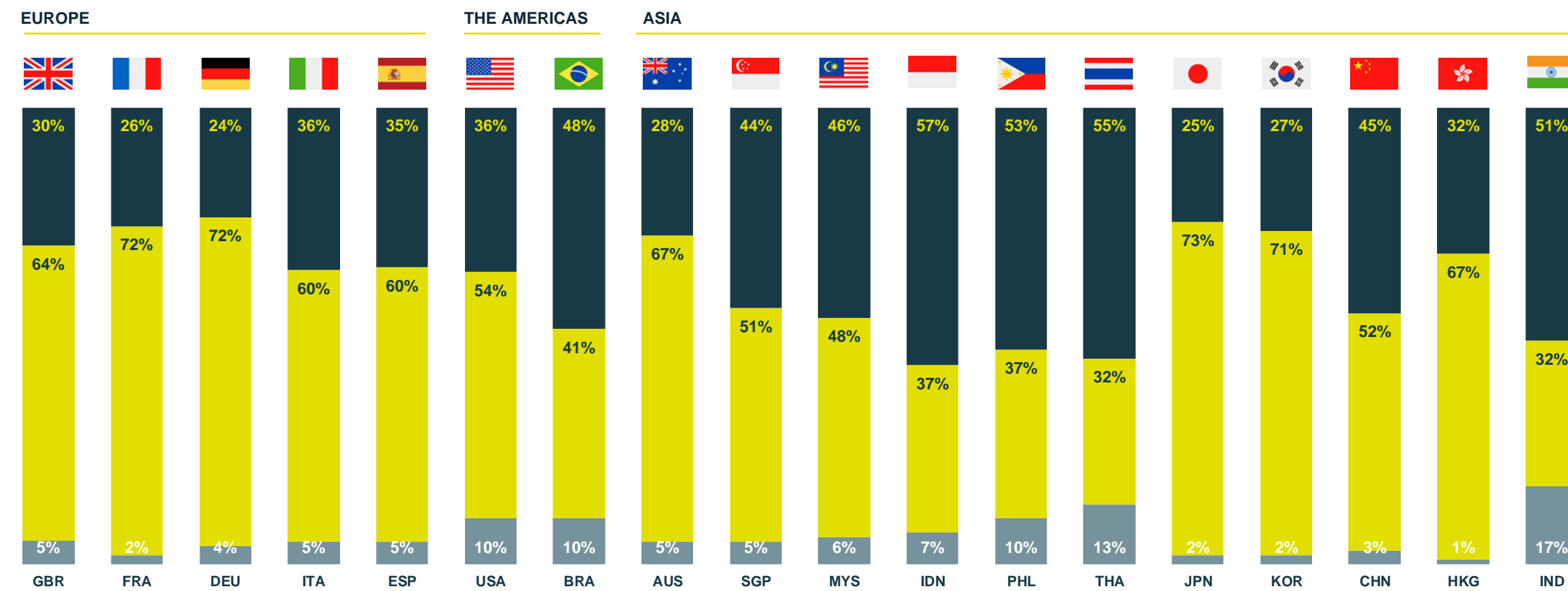
		Be less materialistic	Treat myself and family to a holiday abroad	Treat myself and family to a holiday in my country	Buy something of significant value	Spend more money generally	Be more optimistic about the future	Be more health conscious	Be more environmentally conscious	Go out more, such as to eat or the cinema	Save money to prepare for a rainy day	Take out insurance to cover illness/ loss of holidays/ etc.
EUROPE		20%	21%	24%	7%	12%	32%	35%	20%	28%	26%	7%
		19%	17%	28%	4%	9%	20%	33%	27%	37%	21%	4%
		20%	20%	22%	6%	8%	23%	28%	19%	20%	24%	5%
		26%	22%	39%	7%	9%	29%	50%	38%	35%	40%	8%
		32%	20%	36%	8%	12%	32%	48%	31%	38%	40%	10%
THE AMERICAS		21%	14%	23%	13%	18%	33%	40%	23%	34%	33%	10%
		30%	10%	19%	13%	6%	46%	63%	40%	40%	60%	18%
ASIA		18%	19%	24%	11%	16%	34%	39%	21%	30%	34%	7%
		19%	35%	24%	20%	18%	42%	58%	41%	33%	45%	21%
		23%	8%	21%	20%	9%	50%	76%	52%	14%	68%	27%
		38%	11%	19%	18%	11%	48%	76%	63%	13%	53%	18%
		42%	14%	25%	35%	4%	66%	81%	62%	16%	73%	39%
		26%	15%	33%	19%	11%	36%	74%	50%	27%	63%	35%
		10%	9%	21%	5%	12%	15%	46%	22%	29%	23%	5%
		11%	27%	39%	2%	9%	16%	57%	31%	38%	33%	10%
		15%	12%	29%	6%	21%	32%	80%	59%	17%	42%	36%
		32%	34%	17%	3%	26%	12%	66%	37%	22%	48%	9%
		21%	21%	32%	30%	25%	52%	64%	56%	26%	35%	30%

Lowest scoring country for each measure

Highest scoring country for each measure

# Considering changes you have made to your behaviour since the beginning of coronavirus outbreak, how likely are you to make these part of your lifestyle in the future?

It feels like there are positive intentions amongst consumers to continue with behavioural changes post-Coronavirus



\*Some numbers may not total 100% based on rounding

■ N/A - No changes to lifestyle    ■ 0 Not at all likely - 7    ■ 8 - 10 Extremely likely

# Automotive

toluna\*



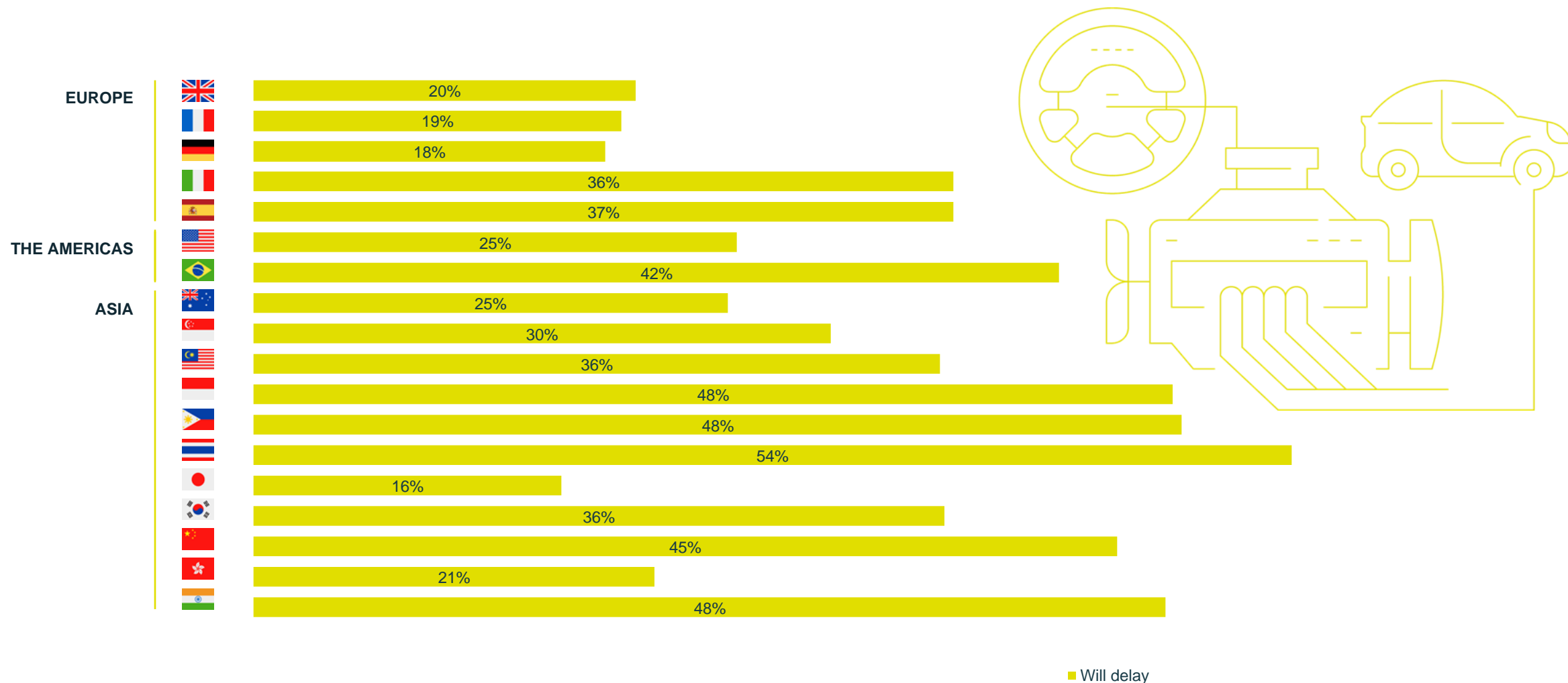
harris  
interactive

KURUNDATA



# Do you feel your likelihood of **buying a new car** will change as a result of the coronavirus?

The new car market is set to feel the impact of coronavirus as a large proportion of people feel they will delay buying a new car as a consequence



# Health & Beauty

toluna\*



harris  
interactive

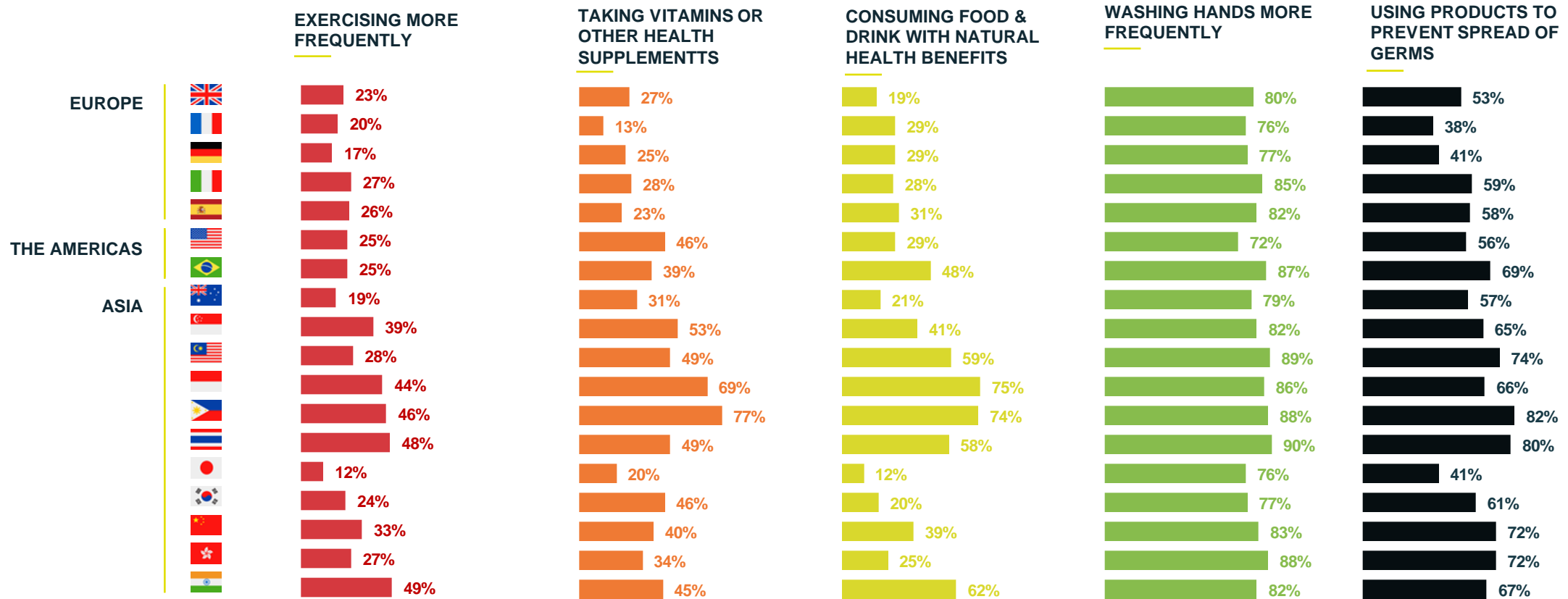
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# Which steps have you taken in the past 2 weeks to look after your health in response to the outbreak of coronavirus?



















Overall people are trying to focus more on their health and wellbeing by taking vitamins, trying products with health benefits, exercising and of course washing hands more frequently.





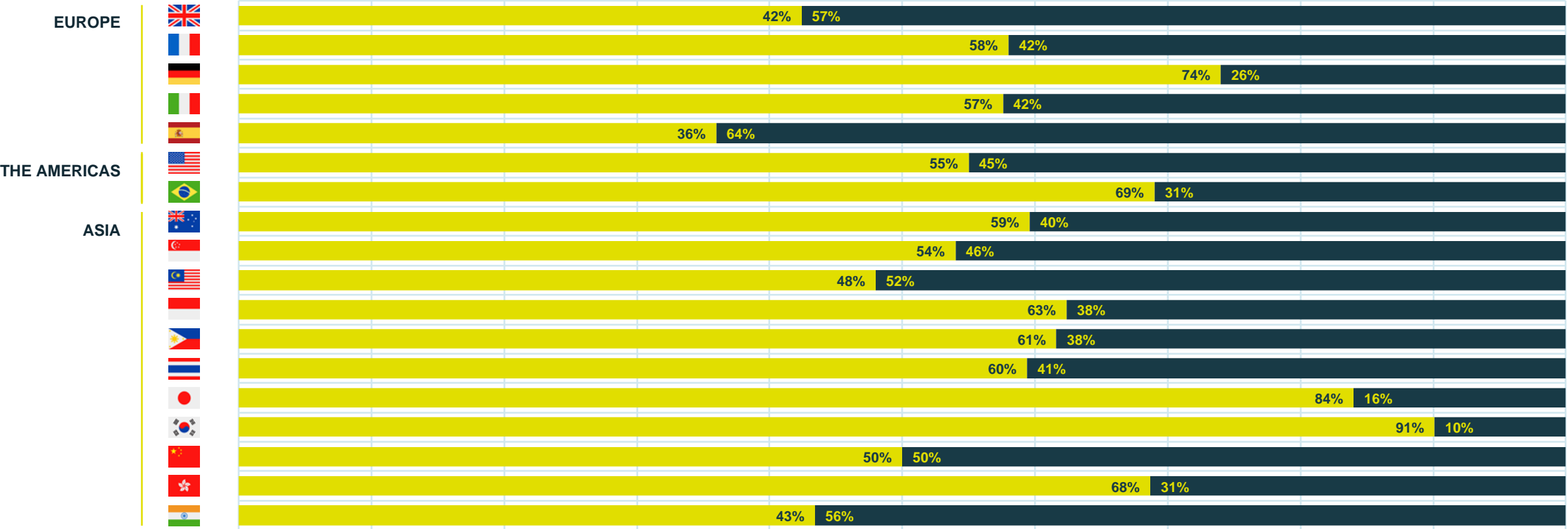
# Which of the following statements describe your attitude to health and wellness following the outbreak of coronavirus?

There is a universal sense that personal health will become a bigger concern in future and many acknowledge their country's health system is not ready to handle such crises.

	EUROPE					THE AMERICAS		ASIA										
																		
Personal health will become a bigger concern in the future	35%	26%	33%	41%	40%	35%	47%	40%	45%	42%	56%	42%	47%	33%	56%	67%	55%	44%
The healthcare system in my country is not prepared to handle a health crisis	30%	41%	32%	28%	36%	34%	53%	29%	10%	14%	37%	44%	29%	28%	7%	14%	30%	28%
I am concerned about my mental health with all of the news about coronavirus	22%	9%	17%	19%	24%	22%	34%	25%	30%	25%	22%	19%	45%	20%	21%	17%	34%	34%
I plan to improve my personal self-care to be better prepared for future health issues	21%	11%	19%	20%	25%	27%	47%	27%	43%	54%	46%	65%	50%	24%	30%	45%	39%	44%
Hospitals and GPs should offer more Telehealth opportunities where you can remotely interact with a health care professional	20%	18%	19%	29%	25%	28%	34%	30%	30%	39%	26%	43%	33%	28%	20%	27%	17%	34%
I only buy medication from trusted brands	17%	6%	15%	12%	15%	21%	22%	19%	29%	25%	23%	34%	25%	9%	14%	18%	22%	36%
OTC medication is a good way to stay healthy and be prepared for such crises	15%	7%	9%	10%	10%	19%	11%	14%	16%	14%	13%	34%	20%	13%	16%	17%	13%	26%
In the future I plan to inform myself more about how to stay well	15%	12%	18%	16%	17%	21%	21%	18%	27%	54%	53%	56%	40%	19%	35%	52%	41%	39%
I have used more aggressive chemicals than usual to clean my hands and home	9%	6%	7%	15%	15%	16%	11%	11%	14%	11%	10%	12%	13%	7%	11%	17%	38%	24%

# How would you rate the supportiveness of the healthcare services in response to the outbreak of coronavirus?

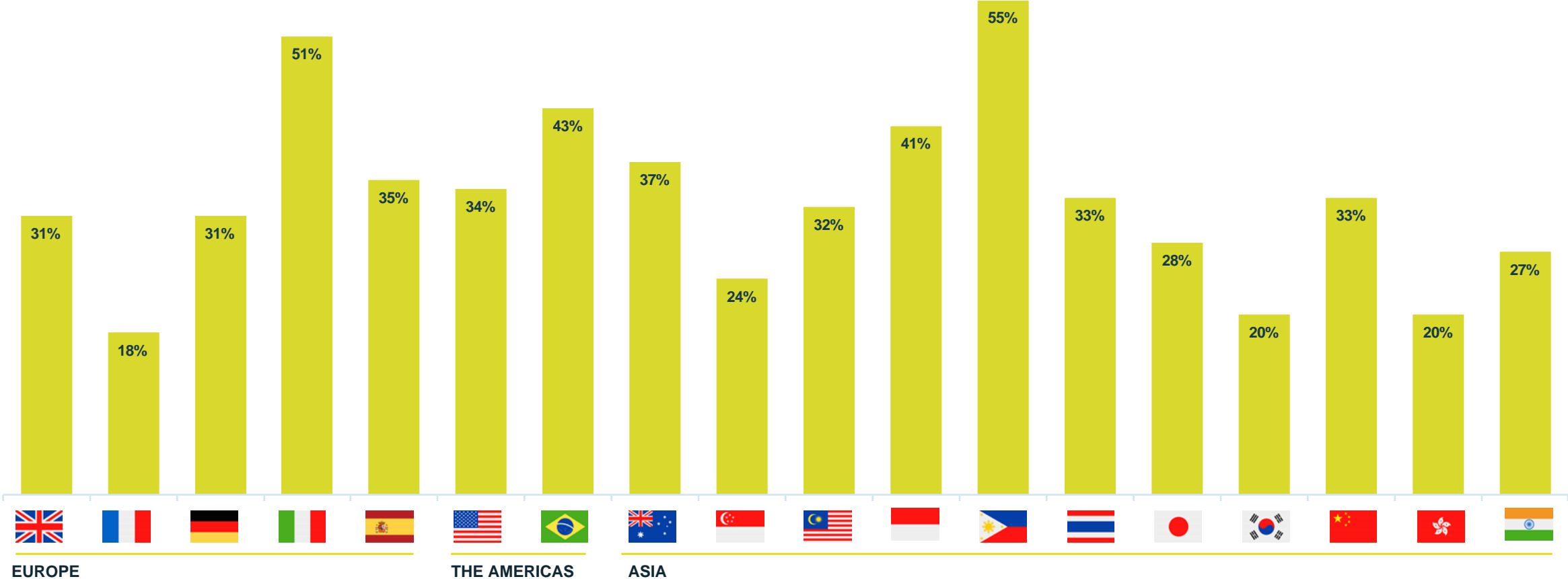
The country's health system comes under most criticism in Japan and Korea as well as Germany whilst the UK and Spain are especially supportive



0 to 8 9 to 10 Extremely Supportive

# Have you spent money on non prescription medication in the past 2 weeks for yourself and your household?

Non prescription medication is being highly purchased everywhere but especially in Italy and the Philippines when compared to markets like France and Korea



# Consumer Finance

toluna\*



harris  
interactive

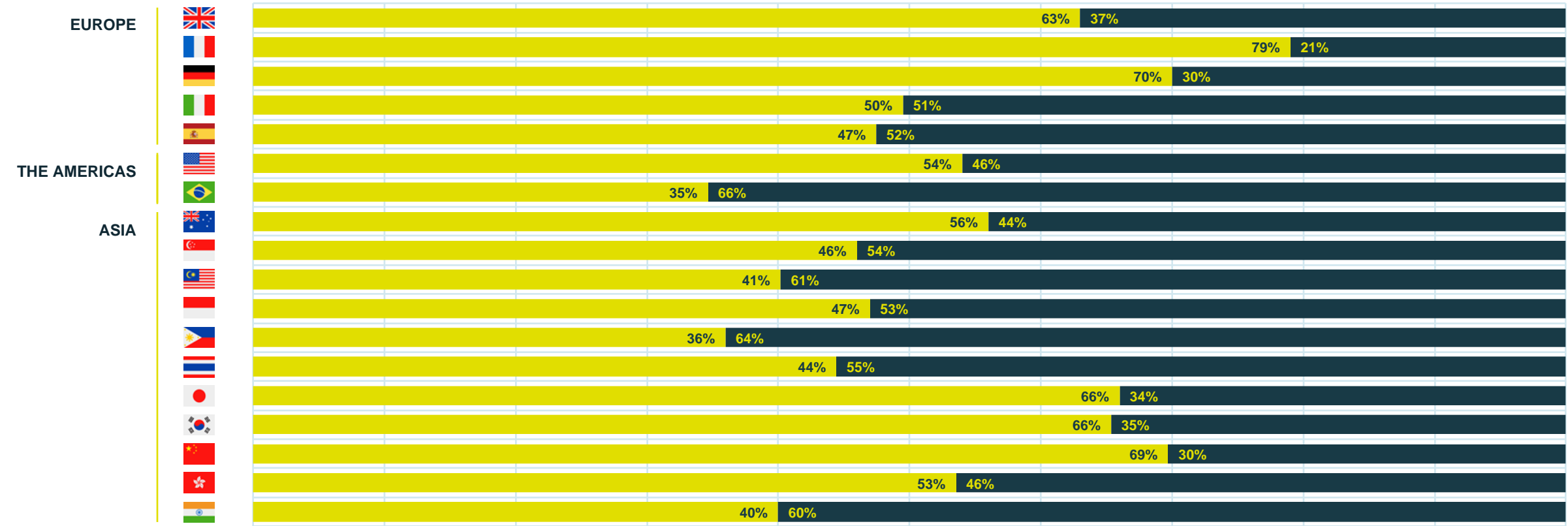
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# Level of concern with personal financial security because of Coronavirus

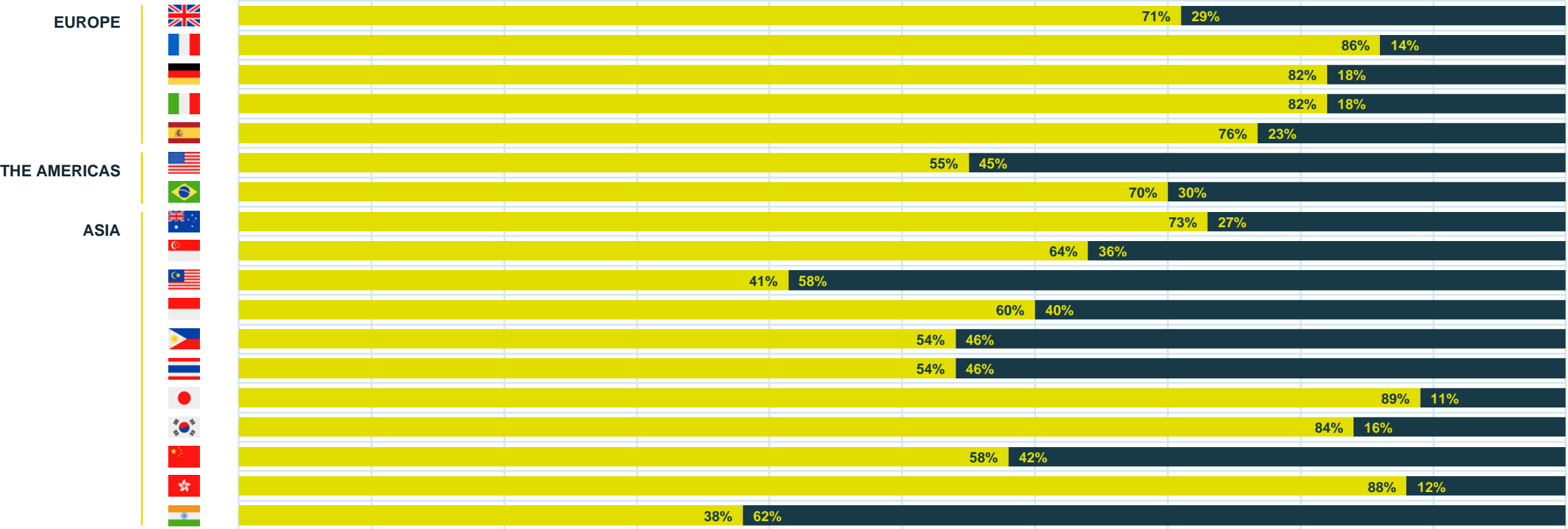
France, Germany and some South East Asian countries (China, Korea and Japan), are the least concerned about their personal financial security because of Coronavirus. Brazil is the most concerned, followed by Philippines, Malaysia and India.



0 to 8 9 to 10 Extremely Supportive

# Level of supportiveness from financial institutions in response to Coronavirus

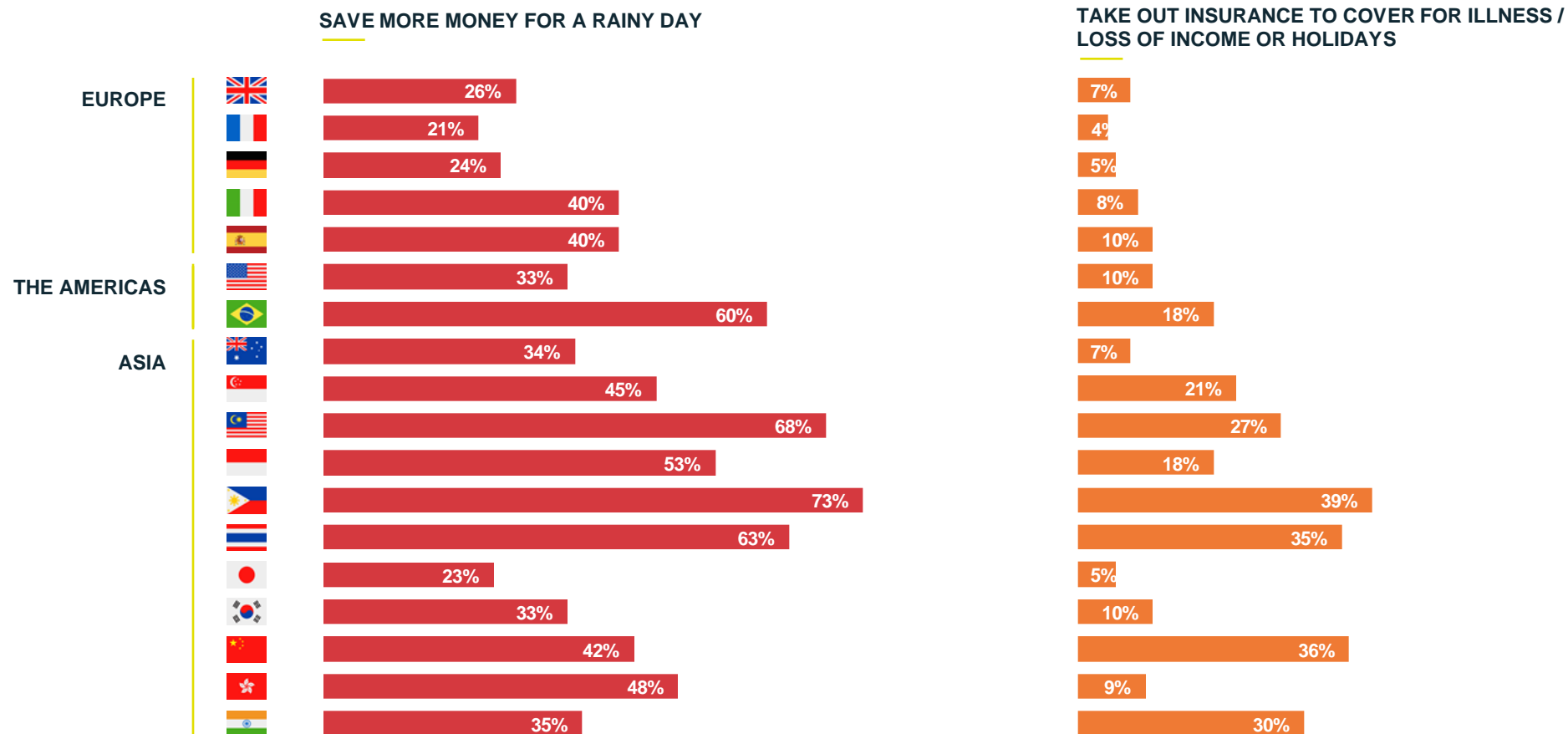
Almost nine in ten of those in Japan and Hong Kong do not feel well supported by financial institutions in response to Coronavirus. Those in India and Malaysia feel the most supported – the only countries where over half of those surveyed feel this way.



0 to 8 9 to 10 Extremely Supportive

# Coronavirus restrictions knock-on effects

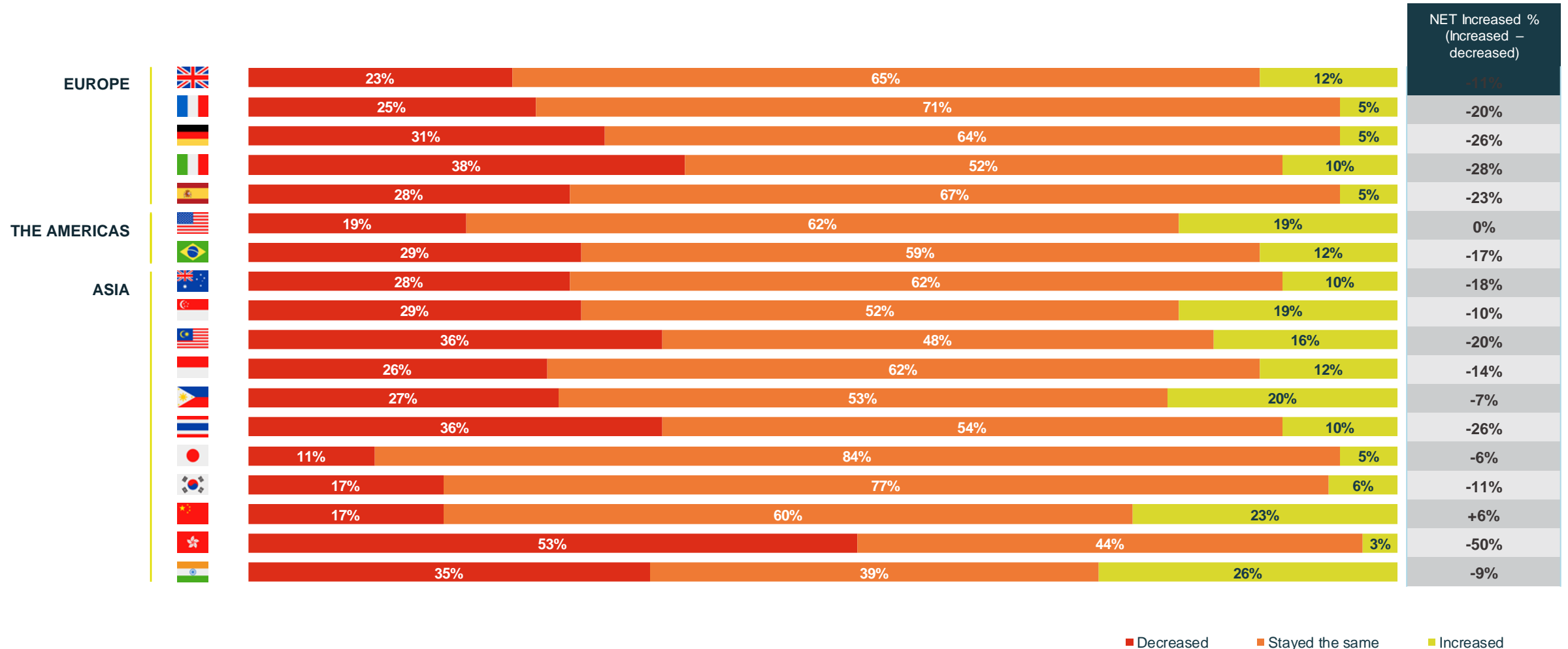
Those in the Philippines and Malaysia are most likely to say they will save more money for a rainy day in the future. Increased take out of insurance cover is least likely to take place following the outbreak in European markets, as well as Australia, Hong Kong and Japan.





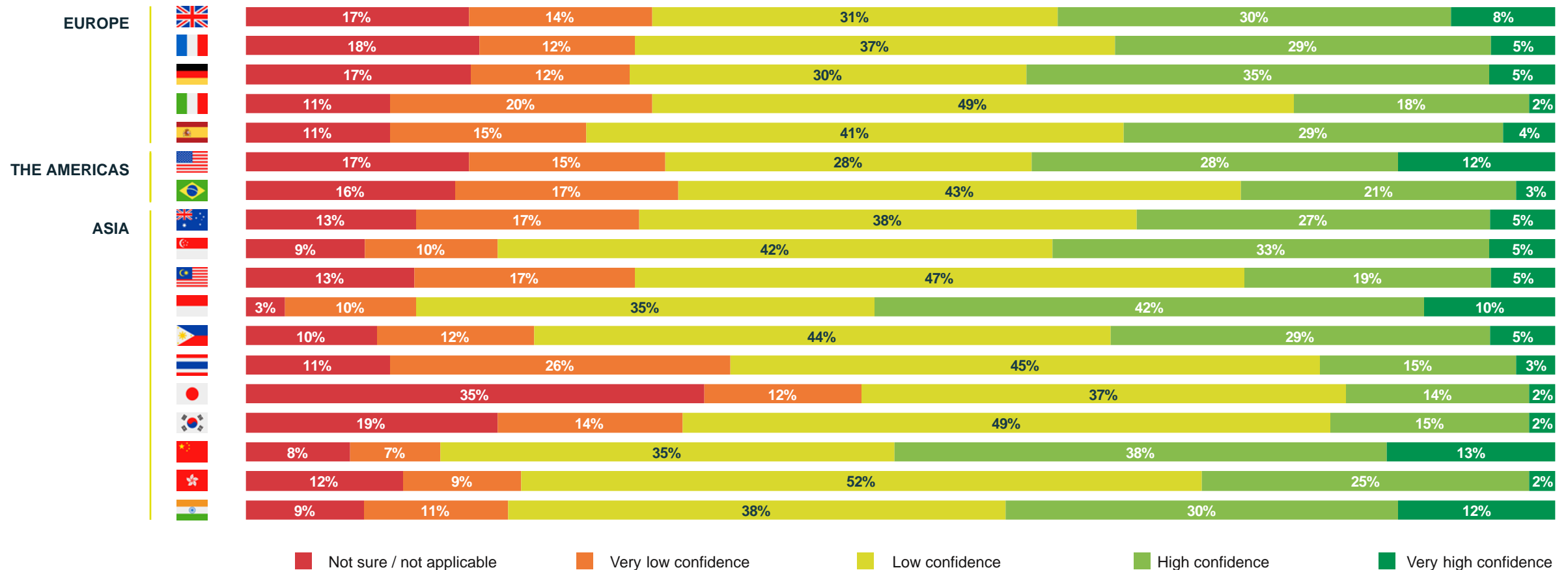
# Change in confidence in financial institutions in the past 2 weeks

China is the only market where there has been a net increase in confidence in financial institutions in the past 2 weeks. Confidence has decreased most markedly in Hong Kong. The UK sees the highest increase in confidence of European markets.






















# Confidence in own personal finances in the wake of Coronavirus

Confidence with their own personal finances in the wake of Coronavirus is highest in Indonesia and China. At least 3 in 5 have low confidence in Thailand, Italy, Malaysia, Korea, Hong Kong and Brazil.



# Confidence in FS institutions in the wake of Coronavirus



















Confidence in a nation's government is the most divisive confidence area, with the best confidence scores for this area in 8 markets, but the lowest confidence scores in 4 markets. IFA's also fail to breed confidence in several markets.

NET Confident % (Very high / high confidence – low / very low confidence)		My country's central bank	Financial regulating body	Banks or similar (for personal or commercial banking)	Online-only banks	Insurance companies	Independent financial advisors	Credit card companies	Investment / pension companies	The Government
EUROPE										
		21%	13%	17%	4%	-13%	-9%	3%	-8%	20%
		-13%	-26%	-22%	-28%	-36%	-39%	-24%	-28%	-32%
		5%	-2%	-2%	0%	-11%	-30%	4%	-18%	16%
THE AMERICAS		-25%	-44%	-43%	-33%	-43%	-56%	-33%	-47%	-6%
		-36%	-44%	-37%	-31%	-41%	-52%	-41%	-60%	-41%
		13%	6%	26%	12%	11%	2%	21%	-2%	-3%
		-6%	-22%	-15%	11%	-23%	-33%	-12%	-34%	-32%
ASIA		10%	-1%	0%	-7%	-25%	-23%	-21%	-23%	12%
		48%	29%	34%	11%	22%	-8%	11%	-3%	60%
		46%	24%	25%	33%	21%	-6%	-14%	6%	58%
		53%	30%	44%	28%	27%	23%	14%	24%	44%
		49%	14%	56%	42%	29%	14%	21%	24%	28%
		18%	-6%	1%	9%	10%	-29%	-9%	-20%	-38%
		1%	-6%	17%	19%	9%	-12%	29%	-27%	-29%
		17%	-9%	-8%	9%	-24%	-25%	-6%	-41%	17%
		77%	53%	56%	61%	43%	7%	33%	29%	80%
		-4%	4%	9%	-40%	11%	-32%	30%	-23%	-48%
		33%	15%	20%	22%	4%	-8%	-4%	0%	52%

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

# Changes in dealing with financial providers in the past 2 weeks

There has been a marked increase in use of digital channels when dealing with financial providers in all markets at the expense of more physical interactions. Looking to switch financial products for a better deal has taken a back seat in many markets, with the exception of Hong Kong and China.

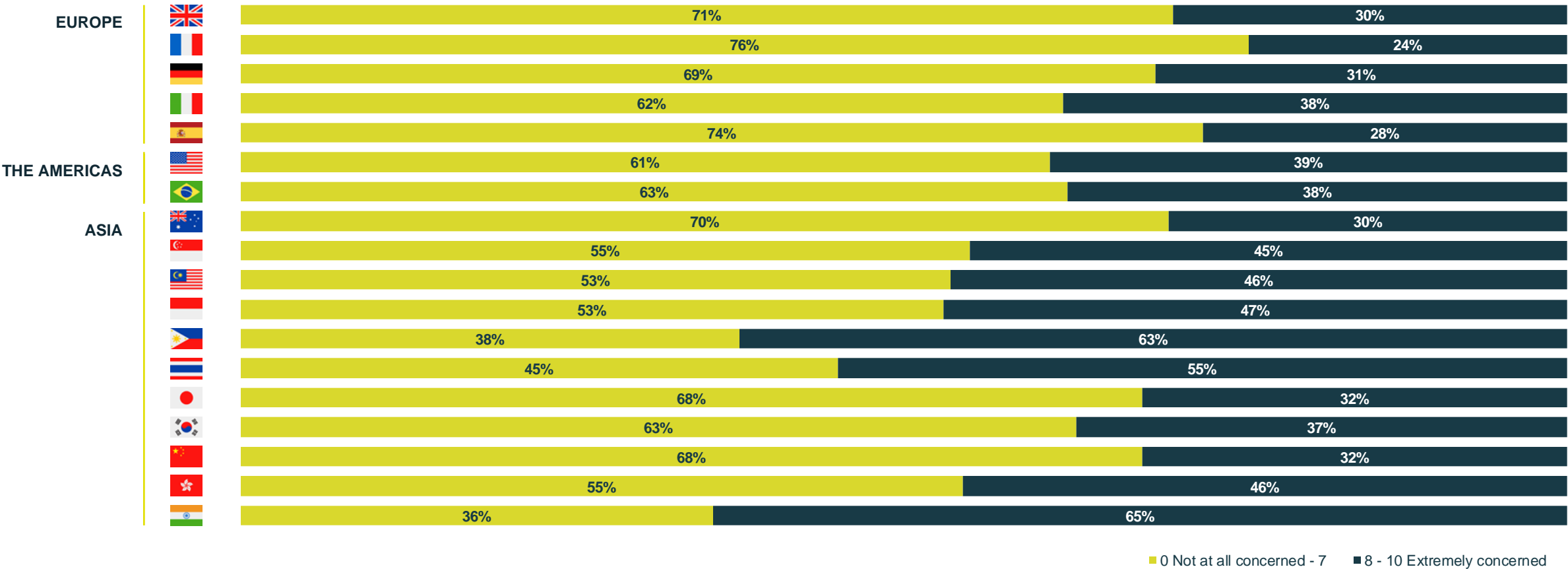
NET More Often % (More often than in past 2 weeks – less often than in past 2 weeks)		Using online banking	Using mobile apps	Using telephone banking	In-person at a branch	Using ATMs	Using virtual payment cards	Checking the value of my bank balance	Checking the value of my savings	Checking the value of my investments	Looking to switch financial products to get a better deal
EUROPE		11%	12%	-2%	-30%	-32%	3%	6%	1%	-1%	-4%
		1%	3%	-5%	-28%	-37%	-5%	1%	0%	0%	-8%
		4%	11%	-2%	-25%	-20%	8%	2%	2%	3%	-2%
		11%	18%	-9%	-47%	-35%	4%	4%	4%	-1%	-12%
		20%	32%	-7%	-49%	-41%	6%	11%	3%	3%	-11%
THE AMERICAS		15%	21%	9%	-17%	-5%	10%	13%	10%	9%	3%
		32%	37%	0%	-52%	-42%	16%	19%	21%	14%	1%
ASIA		11%	11%	-1%	-21%	-23%	2%	8%	9%	6%	-4%
		31%	39%	5%	-36%	-23%	16%	16%	16%	23%	3%
		24%	33%	10%	-36%	-43%	5%	8%	13%	4%	-6%
		22%	43%	31%	-36%	-22%	15%	9%	8%	7%	4%
		16%	39%	-2%	-9%	-14%	4%	10%	15%	0%	-4%
		47%	57%	22%	-61%	-28%	9%	23%	15%	9%	5%
		3%	6%	-2%	-8%	-8%	0%	-1%	-2%	1%	-1%
		18%	27%	-4%	-36%	-28%	4%	4%	1%	0%	-4%
		39%	50%	-1%	-48%	-33%	21%	20%	18%	17%	15%
		28%	25%	-6%	-36%	-24%	3%	15%	10%	10%	11%
		37%	48%	9%	-26%	-12%	16%	16%	23%	15%	7%

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

# Travel

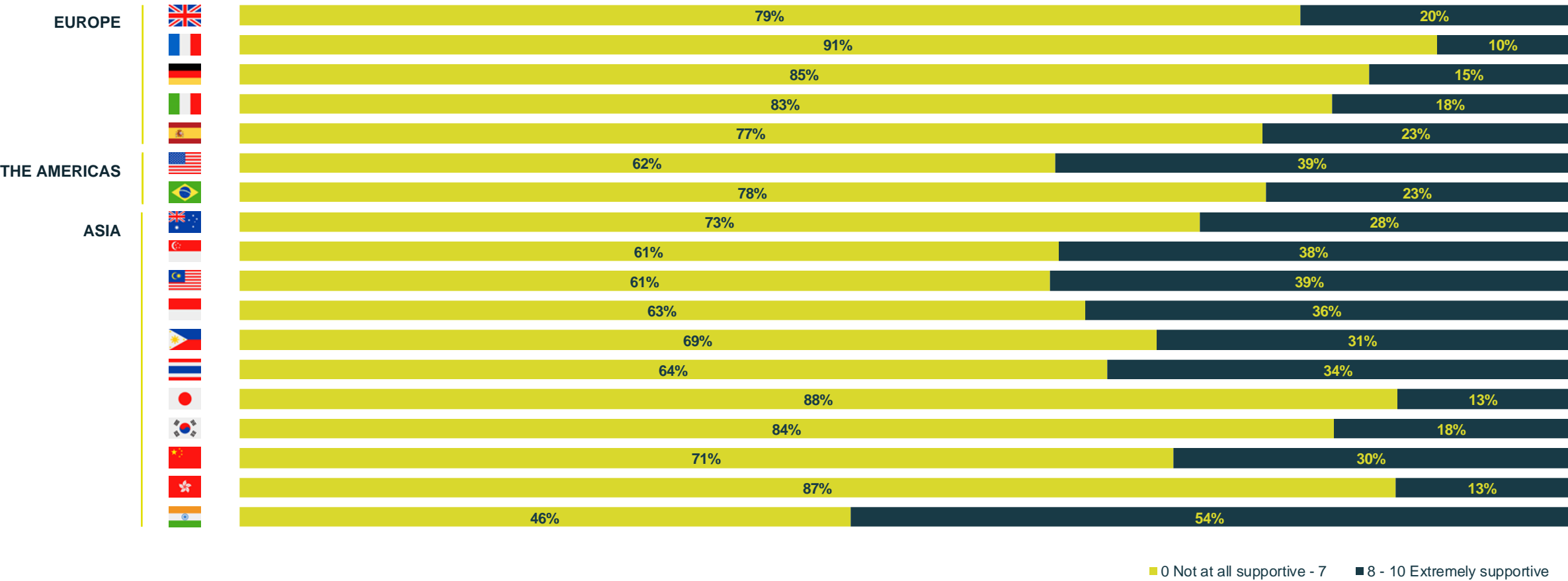
# Level of concern with travel restrictions because of the Coronavirus

The highest concerns with travel restrictions are in India, Philippines and Thailand. In Europe, Italy is the most concerned country.



# Level of support by the travel industry (airlines, hotels, cruise companies)



















Many consumers in India agree there has been extreme support from the travel industry. Other countries with relatively high levels of agreement are USA, Malaysia, Singapore and Indonesia. The majority of Europeans disagree.





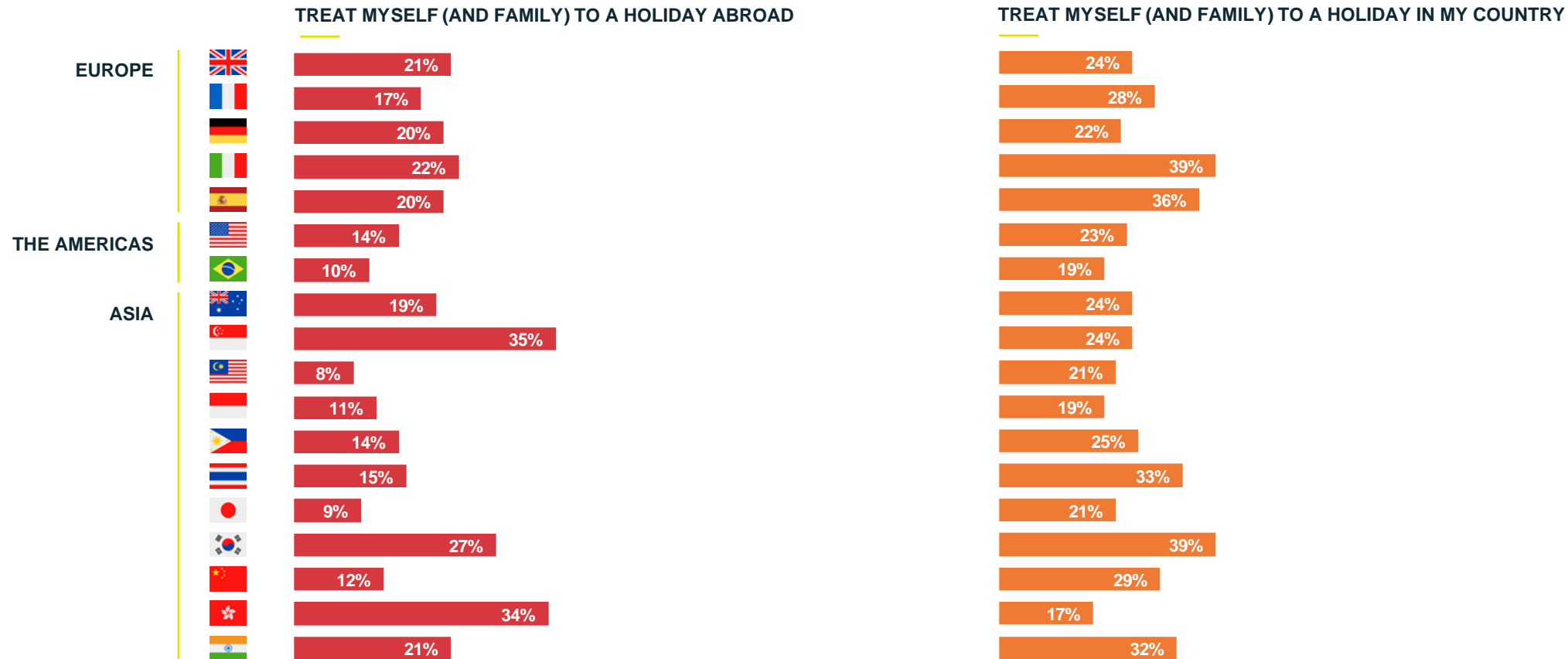
# Soonest moment one would feel comfortable booking tickets for a foreign holiday

Consumers in Malaysia and Japan are the most pessimistic, with the highest proportions of those not feeling comfortable booking any foreign holidays for 2020. However, at least half of consumers in France, Spain and China would be comfortable booking tickets for a foreign holiday during June to September this year.

	EUROPE					THE AMERICAS		ASIA										
																		
March to May 2020	11%	9%	11%	4%	9%	26%	10%	9%	15%	4%	11%	16%	24%	5%	5%	21%	6%	27%
June to September 2020	33%	54%	43%	41%	57%	31%	26%	20%	23%	14%	37%	23%	18%	22%	38%	50%	20%	33%
October to December 2020	14%	7%	11%	14%	9%	12%	25%	24%	25%	13%	13%	24%	11%	15%	19%	11%	23%	20%
January to March 2021	13%	5%	11%	12%	9%	8%	24%	18%	17%	29%	13%	18%	11%	16%	15%	4%	16%	9%
I wouldn't be comfortable with any of these months	28%	24%	25%	30%	15%	21%	16%	30%	22%	39%	26%	19%	36%	43%	23%	13%	34%	11%

# Likelihood to go on holiday once the coronavirus crisis is over

Consumers in Singapore, Hong Kong and Korea are most keen to travel abroad once the crisis is over. However, in all markets except Hong Kong and Singapore, people are more likely to treat themselves to a domestic holiday. This difference is most evident in China, Italy, Spain and Thailand.





# Media & Entertainment

toluna\*





















harris  
interactive

KURUNDATA





















# How has your usage of the following media changed in the past 2 weeks following the ongoing effects of the coronavirus? – NET GROWTH

Increase is more significant on watching broadcast TV and reading online news over the past 2 weeks. Readership has dropped in selected markets (Italy, Spain, China) probably due to lockdown.

	EUROPE					THE AMERICAS		ASIA										
																		
Watching broadcast TV	91%	94%	90%	97%	96%	85%	90%	91%	86%	94%	98%	96%	95%	91%	94%	93%	96%	96%
Watching a paid subscription video on demand service	59%	43%	47%	57%	72%	65%	76%	60%	70%	59%	67%	68%	60%	43%	46%	68%	47%	87%
Watching catch up TV using an online streaming service	76%	66%	63%	77%	70%	71%	72%	65%	79%	77%	77%	79%	83%	49%	74%	87%	73%	93%
Buying/renting TV shows or movies	42%	32%	44%	49%	53%	58%	57%	41%	49%	45%	57%	49%	55%	45%	67%	64%	51%	81%
Reading printed books	76%	73%	79%	84%	82%	74%	81%	71%	73%	67%	76%	70%	69%	70%	66%	83%	73%	90%
Reading eBooks	44%	29%	42%	52%	62%	53%	65%	41%	61%	52%	68%	58%	76%	43%	50%	84%	54%	86%
Listening to audiobooks	30%	24%	39%	39%	42%	45%	44%	30%	52%	38%	53%	48%	48%	31%	37%	70%	38%	76%
Listening to podcasts	37%	34%	40%	47%	58%	51%	62%	41%	58%	62%	65%	59%	60%	29%	44%	63%	42%	79%
Listening to broadcast radio	74%	80%	87%	89%	85%	73%	78%	75%	75%	79%	68%	81%	71%	57%	65%	71%	68%	81%
Reading printed newspapers	58%	56%	72%	72%	66%	62%	52%	59%	78%	62%	63%	71%	65%	63%	53%	67%	75%	92%
Reading online news sites	84%	78%	86%	96%	95%	81%	94%	83%	96%	90%	95%	97%	98%	87%	91%	96%	96%	96%
Making home improvements/DIY	73%	69%	55%	78%	76%	67%	87%	64%	75%	68%	80%	82%	86%	41%	70%	68%	43%	89%
Playing video games on a smartphone/tablet	48%	51%	50%	65%	68%	62%	68%	46%	75%	73%	82%	85%	84%	52%	67%	86%	80%	90%
Playing video games on a PC	38%	45%	47%	55%	59%	53%	54%	40%	61%	49%	67%	71%	62%	39%	52%	80%	57%	81%
Playing video games on a console	38%	40%	37%	50%	56%	49%	50%	37%	58%	45%	55%	58%	56%	38%	37%	64%	54%	76%



















# How has your usage of the following media changed in the past 2 weeks following the ongoing effects of the coronavirus? – NET GROWTH

Increase is more significant on watching broadcast TV and reading online news over the past 2 weeks. Readership has dropped in selected markets (Italy, Spain, China) probably due to lockdown.

	EUROPE					THE AMERICAS		ASIA										
																		
Watching broadcast TV	39%	49%	38%	66%	53%	43%	44%	38%	48%	58%	68%	59%	68%	32%	54%	46%	44%	69%
Watching a paid subscription video on demand service	25%	18%	16%	23%	37%	35%	43%	20%	37%	32%	33%	25%	25%	13%	13%	26%	16%	51%
Watching catch up TV using an online streaming service	27%	25%	22%	41%	34%	38%	34%	20%	39%	47%	35%	39%	46%	14%	31%	44%	35%	60%
Buying/renting TV shows or movies	11%	9%	11%	17%	23%	26%	25%	9%	18%	10%	20%	12%	16%	8%	21%	16%	13%	40%
Reading printed books	21%	21%	20%	33%	30%	27%	28%	13%	19%	17%	18%	12%	9%	9%	11%	21%	9%	44%
Reading eBooks	11%	9%	11%	18%	24%	24%	29%	9%	22%	19%	26%	11%	42%	11%	9%	40%	15%	42%
Listening to audiobooks	8%	8%	8%	9%	13%	21%	17%	6%	22%	7%	13%	7%	14%	5%	4%	28%	10%	39%
Listening to podcasts	11%	7%	11%	12%	19%	24%	24%	9%	25%	18%	21%	19%	19%	5%	8%	20%	10%	42%
Listening to broadcast radio	14%	7%	22%	16%	25%	21%	24%	12%	32%	11%	16%	38%	29%	11%	16%	21%	19%	41%
Reading printed newspapers	3%	0%	9%	-5%	-7%	21%	6%	4%	27%	6%	17%	21%	14%	10%	12%	-4%	4%	39%
Reading online news sites	42%	35%	41%	67%	62%	43%	64%	43%	71%	61%	67%	67%	75%	41%	57%	71%	57%	72%
Making home improvements/DIY	24%	25%	16%	26%	31%	29%	45%	13%	29%	24%	39%	30%	49%	6%	12%	25%	11%	53%
Playing video games on a smartphone/tablet	18%	22%	17%	28%	36%	31%	39%	12%	34%	37%	42%	42%	43%	14%	24%	45%	36%	50%
Playing video games on a PC	13%	18%	13%	23%	30%	24%	23%	10%	24%	19%	24%	20%	20%	8%	15%	36%	24%	39%
Playing video games on a console	13%	17%	12%	19%	29%	25%	24%	9%	28%	18%	19%	15%	16%	10%	10%	24%	23%	42%

# How has your usage of the following media changed in the past 2 weeks following the ongoing effects of the coronavirus? – Any activity



















Usage of YouTube is high across all markets (except China where TikTok dominates), while that of Facebook is also high across Europe, Americas and Southeast Asia/Hong Kong/India.

	EUROPE					THE AMERICAS		ASIA										
																		
Using Facebook	72%	77%	64%	82%	84%	80%	90%	78%	92%	93%	92%	98%	97%	45%	66%	N/A	94%	96%
Using Twitter	39%	32%	30%	44%	59%	49%	55%	33%	61%	50%	67%	66%	68%	53%	43%	N/A	40%	83%
Using Instagram	43%	39%	42%	63%	67%	53%	85%	45%	77%	71%	85%	72%	78%	41%	61%	N/A	66%	89%
Using Tik Tok	21%	19%	21%	25%	29%	38%	41%	21%	44%	24%	40%	43%	49%	21%	29%	86%	25%	68%
Social site excl. Facebook, Twitter, Instagram & Tik Tok	50%	48%	50%	60%	67%	59%	73%	52%	83%	86%	89%	86%	86%	49%	57%	70%	78%	93%
Watching videos on YouTube	72%	71%	74%	91%	93%	74%	95%	72%	96%	94%	95%	99%	97%	78%	90%	N/A	94%	99%



# How has your usage of the following media changed in the past 2 weeks following the ongoing effects of the coronavirus? – NET GROWTH



















Among the various social media channels, Facebook and YouTube (and TikTok for China) sees the highest growth in usage over the last 2 weeks.

	EUROPE					THE AMERICAS		ASIA										
																		
Using Facebook	28%	30%	21%	42%	41%	34%	45%	23%	46%	60%	47%	67%	68%	7%	11%	N/A	48%	62%
Using Twitter	12%	11%	7%	13%	24%	24%	24%	9%	26%	16%	26%	20%	32%	15%	6%	N/A	11%	45%
Using Instagram	18%	14%	16%	26%	34%	28%	49%	14%	35%	31%	40%	28%	37%	7%	16%	N/A	26%	51%
Using Tik Tok	8%	7%	8%	7%	10%	22%	25%	7%	17%	6%	12%	16%	17%	4%	5%	54%	5%	36%
Social site excl. Facebook, Twitter, Instagram & Tik Tok	24%	20%	18%	30%	33%	31%	38%	17%	41%	50%	50%	48%	57%	10%	11%	35%	37%	63%
Watching videos on YouTube	24%	22%	24%	43%	50%	36%	60%	22%	52%	63%	62%	67%	72%	21%	46%	N/A	53%	72%



# Which of the following have you done in the past 2 weeks?

Video chatting with family and friends is popular across most markets. Asian markets like Japan and Korea trail other markets where the impact of social distancing is much greater. Online learning is more popular in the US, Thailand and India.

	EUROPE					THE AMERICAS		ASIA												
																				
Video chatting with friends/family	42%			48%	37%	71%	72%	42%	68%	34%	48%	68%	75%	78%	70%	14%	21%	72%	35%	77%
Video conferencing with colleagues	17%			13%	15%	23%	35%	27%	37%	17%	39%	24%	40%	40%	39%	11%	15%	49%	28%	58%
Online learning excl. school/college	10%			6%	9%	11%	13%	18%	38%	9%	27%	15%	25%	23%	36%	5%	13%	17%	9%	43%
Online learning from school/college	9%			8%	9%	11%	12%	17%	22%	11%	20%	13%	17%	13%	21%	4%	9%	16%	9%	34%
None of these	45%			42%	50%	21%	18%	45%	14%	54%	30%	23%	14%	10%	17%	76%	60%	14%	44%	8%

# Utilities & Service Providers

toluna\*

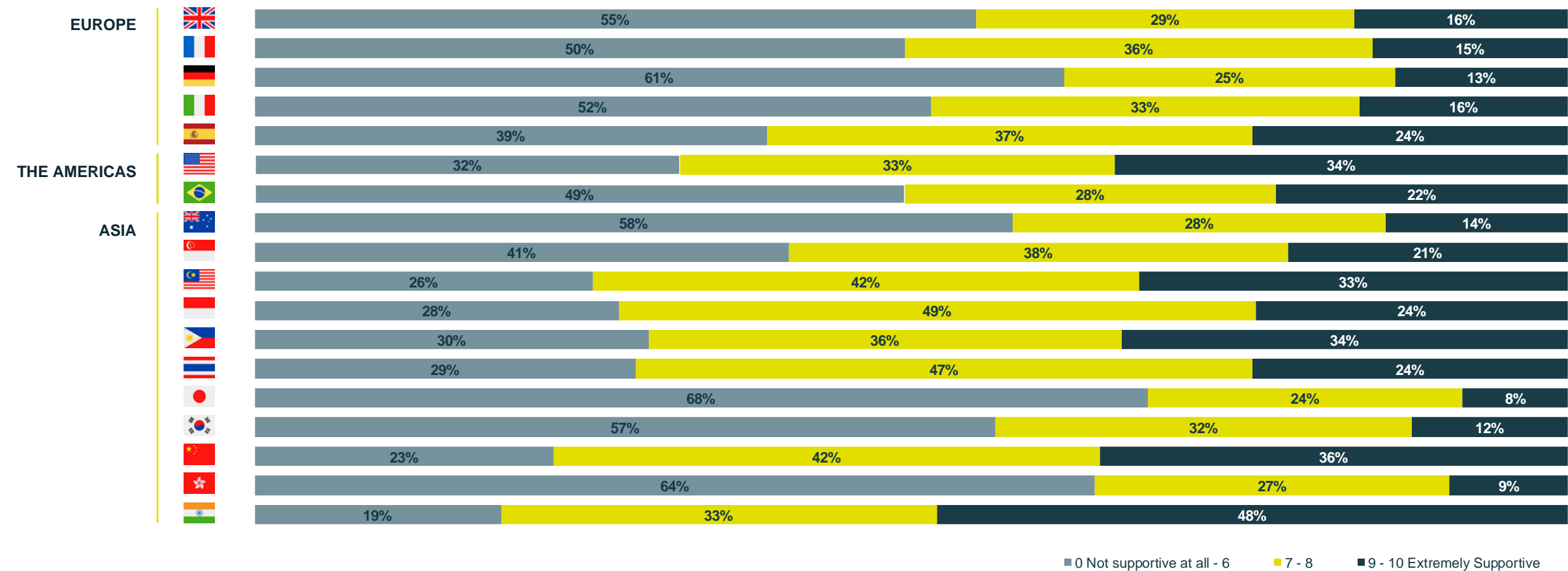


harris  
interactive

KURUNDATA

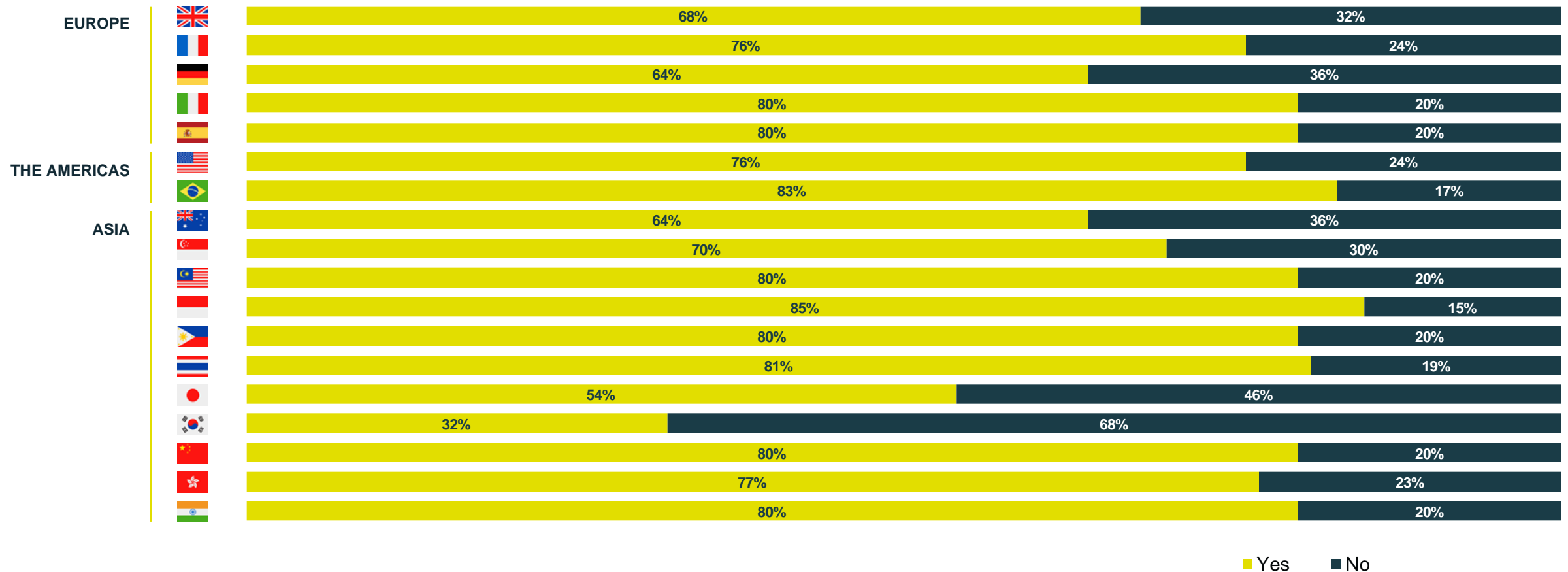
# When thinking about utility companies and service providers, rate the level of supportiveness they have provided to you.

There is a general sense of support lacking from utilities and service providers. Feedback is polarised in USA and some other Southeast Asian markets, while fewer feel extremely supported in Europe, Australia and Northeast Asia.





















# In the past 2 weeks, have you been getting sufficient communications from service providers about the impact of coronavirus?

Overall, the majority of respondents feel they have received sufficient communications from their service providers, with an exception in Korea where only a third feel informed.



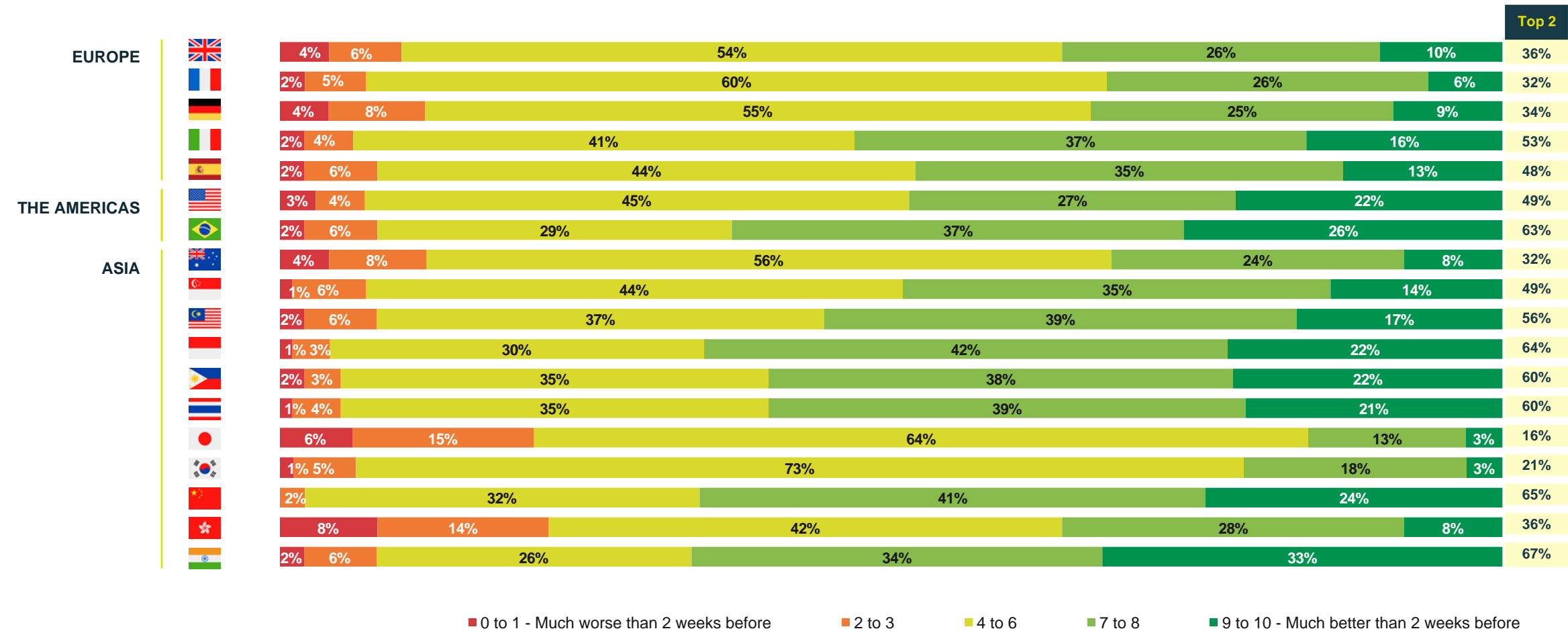
# What types of communications have you received from service providers in the past 2 weeks about the impact of coronavirus?

Emails seem to be one of the key forms of communications in Europe and America, while social media is obviously more prevalent in Asia. Consumers in Japan, Korea and Australia report lower levels of communication.

	EUROPE					THE AMERICAS		ASIA										
																		
E-mails	58%	51%	34%	37%	45%	55%	37%	44%	40%	27%	30%	36%	21%	15%	16%	21%	28%	40%
Text (SMS)	13%	20%	6%	12%	17%	16%	24%	16%	25%	46%	22%	50%	19%	7%	25%	63%	24%	49%
Ads on social media	11%	19%	29%	44%	38%	22%	58%	14%	38%	70%	71%	72%	78%	25%	21%	59%	54%	53%
Ads in newspapers	7%	17%	25%	26%	30%	12%	37%	10%	25%	22%	31%	34%	24%	14%	7%	23%	30%	34%
Letters	5%	6%	7%	4%	5%	14%	3%	4%	12%	5%	7%	8%	5%	5%	3%	8%	7%	14%
None	29%	25%	35%	22%	20%	23%	15%	39%	24%	13%	12%	7%	10%	54%	50%	12%	21%	9%



















# How would you rate the communications from service providers compared to 2 weeks ago?

Compared to 2 weeks ago, a large proportion of people state that service provider communications has improved (with the exception of those markets reporting lower level of communications).





















# Thinking about any communications you have received in the past 2 weeks from service providers about the impact of coronavirus, would you say they were...

Across the board, communications from service providers are generally viewed positively. “Informative” and “helpful” are the top reactions among most markets, while “quick to read” also comes out strongly in Germany.

	EUROPE					THE AMERICAS		ASIA										
																		
Informative	31%	38%	33%	40%	45%	34%	46%	31%	41%	56%	51%	50%	45%	17%	12%	42%	14%	45%
Helpful	24%	32%	25%	38%	36%	31%	47%	24%	35%	52%	47%	47%	58%	24%	21%	44%	41%	52%
Reassuring	21%	13%	12%	17%	13%	24%	14%	19%	24%	24%	24%	27%	27%	7%	10%	33%	12%	20%
Quick to read	13%	17%	33%	13%	18%	21%	13%	16%	22%	26%	13%	20%	19%	9%	8%	29%	14%	29%
Timely	16%	12%	31%	17%	27%	22%	19%	16%	23%	34%	19%	35%	33%	12%	14%	31%	26%	34%

# Thinking about any communications you have received in the past 2 weeks from service providers about the impact of coronavirus, would you say they were...

Whilst negative reactions elicited by communications are few and far between, a large proportion in selected markets report having no reaction to the information provided by service providers (esp. in Australia and Korea).

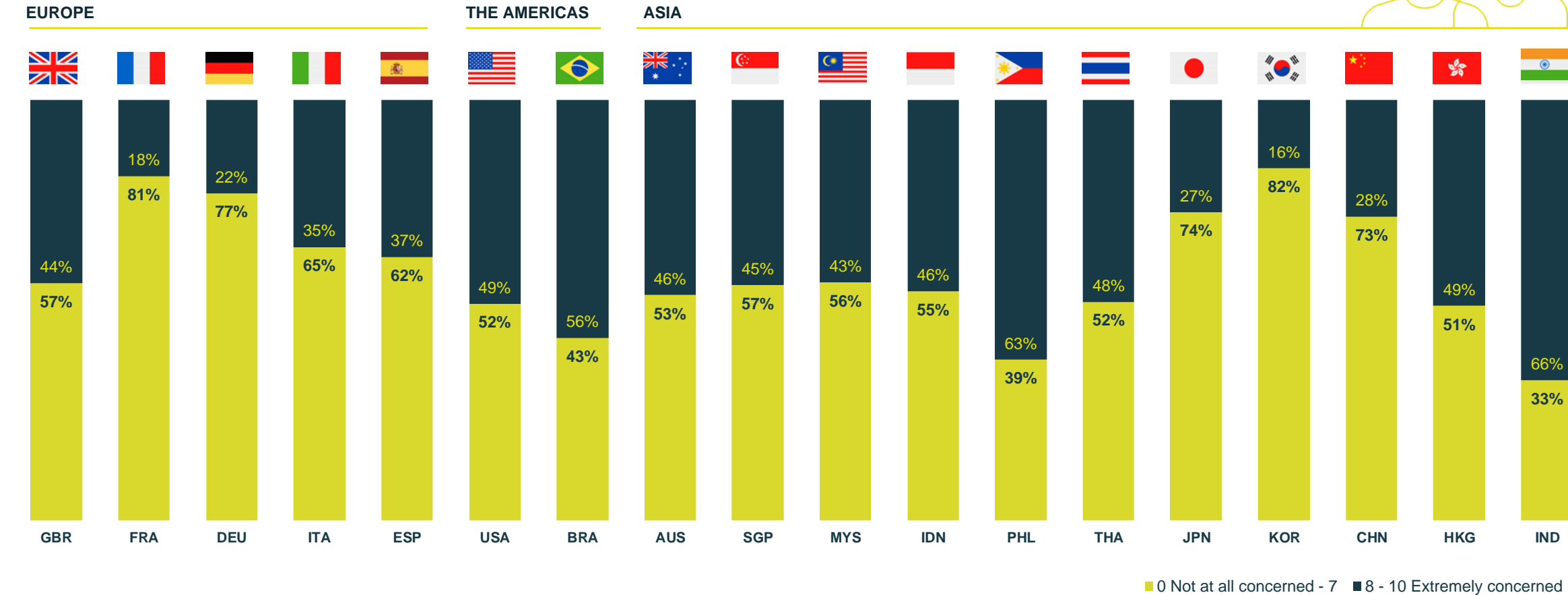
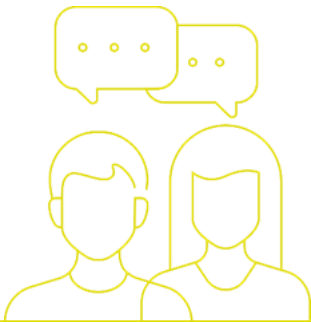
	EUROPE					THE AMERICAS		ASIA										
																		
Over-the-top	4%	4%	9%	7%	8%	8%	18%	6%	8%	8%	11%	8%	10%	12%	6%	4%	8%	16%
Confusing	4%	8%	7%	15%	12%	6%	11%	6%	6%	5%	9%	10%	15%	14%	9%	4%	12%	13%
Irrelevant	7%	6%	6%	8%	8%	10%	5%	6%	6%	5%	4%	5%	3%	7%	10%	6%	8%	11%
Annoying	5%	8%	6%	7%	7%	9%	11%	6%	4%	3%	5%	7%	4%	14%	5%	2%	18%	13%
None of the above	27%	16%	19%	9%	10%	18%	7%	30%	20%	8%	5%	2%	3%	25%	31%	7%	9%	4%



# CPG & FMCG

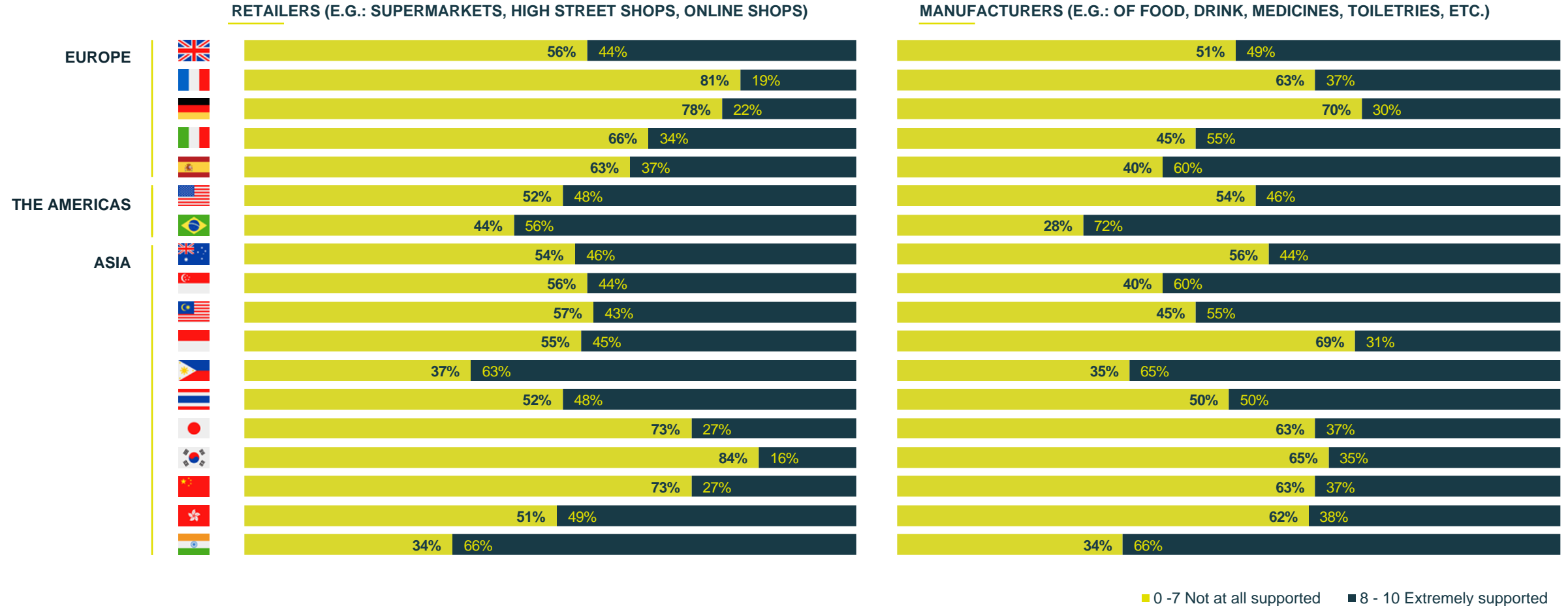
# Level of concern with essential supplies (including groceries, toiletries and medication) because of the Coronavirus

India, Philippines and Brazil are the three countries with the highest level of concern regarding shortage of essential supplies. Korea, France and Germany are not as concerned, followed by Japan.





















# Level of support given in response to the Coronavirus outbreak

Spain, India and USA feel that supermarkets and shops give consumers in these countries good support. However, Japan, Hong Kong and Korea feel the opposite. The best support from manufacturers is reported in India and Spain. Not so true in Japan, Hong Kong and Korea.





















## Past two weeks purchase

Italy, Spain and the Philippines are countries leading in purchasing various products. France, Japan and Korea are generally lower on making purchases in the past 2 weeks across the selected products. Many people from Singapore, Korea and Hong Kong were still enjoying eating in restaurants or cafes.

	EUROPE					THE AMERICAS		ASIA										
																		
In-store grocery shopping	75%	77%	84%	81%	78%	72%	75%	83%	63%	85%	76%	84%	44%	79%	69%	64%	86%	65%
Frozen food	65%	54%	63%	65%	62%	59%	34%	65%	53%	64%	35%	66%	52%	55%	60%	56%	72%	27%
Cleaning products	59%	44%	55%	78%	77%	54%	78%	55%	59%	65%	69%	77%	76%	36%	26%	74%	76%	71%
Long-life or canned goods	55%	57%	57%	72%	58%	51%	53%	59%	47%	65%	52%	85%	61%	36%	34%	39%	51%	27%
Toilet rolls	54%	47%	53%	70%	61%	51%	60%	54%	43%	26%	33%	52%	47%	53%	33%	51%	61%	37%
Handwash or sanitiser	43%	28%	46%	69%	67%	44%	75%	43%	64%	74%	71%	77%	78%	43%	50%	72%	67%	80%
Pasta	42%	60%	48%	83%	70%	47%	58%	52%	26%	24%	22%	32%	7%	32%	12%	34%	30%	25%
Online grocery shopping	24%	22%	11%	25%	23%	32%	27%	15%	44%	38%	48%	22%	59%	27%	59%	70%	43%	47%
Home delivery of food or drink from a restaurant, bar or café	15%	7%	14%	19%	14%	25%	40%	17%	43%	30%	33%	26%	43%	8%	36%	29%	33%	30%
Eating or drinking at a restaurant, bar or café	11%	5%	8%	6%	4%	22%	8%	18%	30%	6%	10%	6%	10%	27%	31%	9%	30%	18%
Curbside or Drive Through pick up of food or drink from a restaurant, bar or café	8%	9%	13%	9%	7%	32%	19%	18%	14%	21%	19%	14%	29%	17%	14%	15%	48%	14%



















# Items purchased more in the past 2 weeks

France, Germany, Japan and Korea are countries with the least stockpiling. Thailand, Philippines, China, India and Hong Kong are stockpiling more. Hong Kong respondents have been using more Drive Through pick up, while those in India and the USA were visiting cafés and restaurants more often.

	EUROPE					THE AMERICAS				ASIA								
																		
Long-life or canned goods	31%	26%	25%	46%	40%	38%	35%	33%	45%	46%	42%	64%	68%	21%	25%	37%	42%	33%
In-store grocery shopping	26%	23%	23%	40%	35%	35%	31%	32%	38%	51%	45%	58%	27%	24%	20%	27%	50%	60%
Frozen food	26%	20%	18%	37%	37%	39%	25%	28%	43%	42%	35%	47%	52%	23%	29%	40%	51%	30%
Handwash or sanitiser	26%	18%	21%	54%	55%	37%	64%	25%	60%	58%	61%	50%	75%	24%	45%	67%	52%	79%
Cleaning products	24%	15%	15%	44%	44%	37%	54%	22%	51%	45%	58%	50%	67%	14%	17%	62%	52%	69%
Toilet rolls	20%	15%	15%	28%	26%	31%	33%	19%	35%	13%	29%	33%	47%	19%	14%	27%	39%	40%
Pasta	17%	23%	15%	40%	37%	29%	30%	20%	23%	17%	19%	16%	12%	13%	6%	27%	19%	25%
Online grocery shopping	15%	17%	8%	21%	20%	28%	27%	11%	40%	23%	35%	21%	53%	14%	41%	58%	35%	47%
Home delivery of food or drink from a restaurant, bar or café	8%	7%	7%	16%	10%	24%	30%	10%	36%	17%	25%	14%	47%	6%	26%	20%	31%	27%
Eating or drinking at a restaurant, bar or café	5%	4%	5%	6%	6%	16%	9%	6%	14%	4%	12%	7%	9%	3%	6%	7%	10%	19%
Curbside or Drive Through pick up of food or drink from a restaurant, bar or café	5%	7%	7%	8%	7%	23%	14%	9%	17%	7%	20%	9%	21%	8%	12%	14%	37%	17%

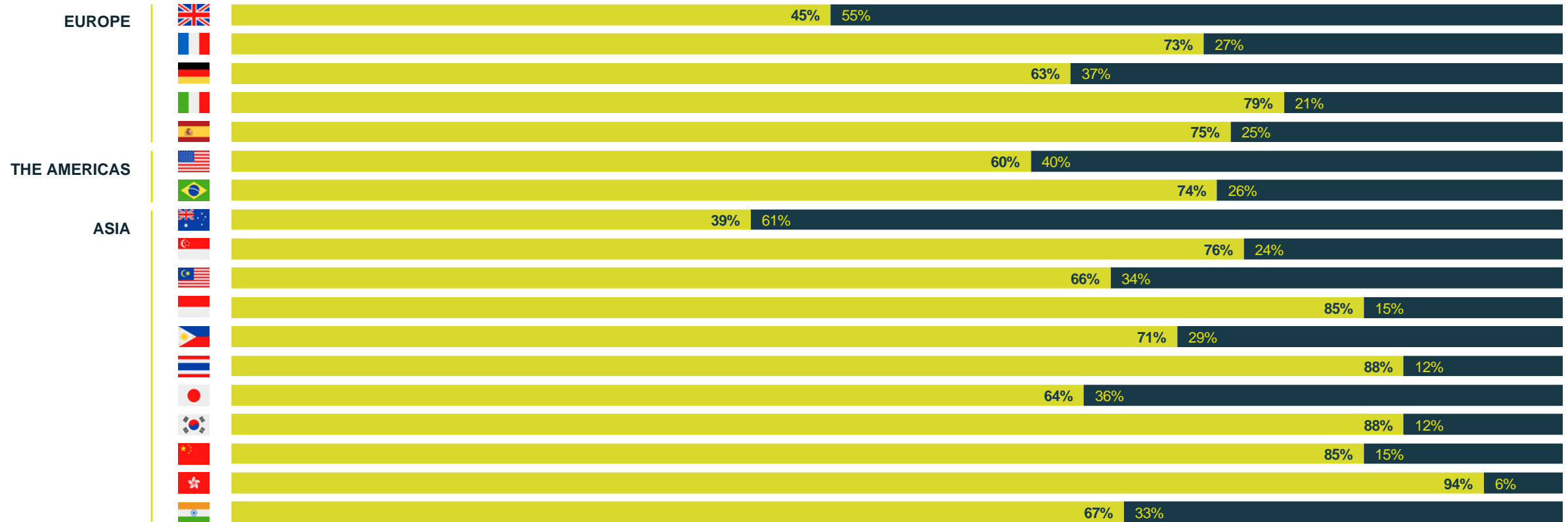
# Items purchased less in the past two weeks

Japan, Korea, USA, and Germany are countries where people were still enjoying eating in restaurants or drinking in bars. Decreases in home delivery of food from restaurants are seen in Malaysia, Philippines and Spain. In store grocery shopping frequency has decreased in Thailand, Korea and China.

	EUROPE					THE AMERICAS				ASIA								
																		
Eating or drinking at a restaurant, bar or café	60%	67%	46%	77%	78%	54%	72%	57%	54%	82%	71%	79%	77%	43%	54%	76%	65%	61%
Curbside or Drive Through pick up of food or drink from a restaurant, bar or café	42%	59%	37%	66%	64%	30%	58%	38%	39%	74%	54%	67%	42%	22%	35%	59%	30%	55%
Home delivery of food or drink from a restaurant, bar or café	36%	51%	33%	55%	59%	30%	38%	35%	24%	60%	47%	60%	22%	24%	26%	50%	32%	46%
Online grocery shopping	28%	35%	23%	35%	38%	23%	40%	33%	19%	44%	30%	56%	15%	14%	10%	7%	20%	23%
Pasta	22%	10%	10%	4%	5%	13%	11%	23%	24%	53%	40%	43%	46%	13%	41%	16%	25%	42%
In-store grocery shopping	16%	11%	4%	14%	18%	20%	22%	13%	14%	13%	21%	18%	34%	7%	26%	37%	9%	13%
Handwash or sanitiser	16%	29%	7%	6%	5%	14%	5%	23%	6%	9%	11%	27%	3%	11%	13%	4%	13%	5%
Toilet rolls	16%	14%	10%	5%	7%	14%	7%	29%	10%	44%	28%	31%	8%	13%	16%	4%	9%	23%
Long-life or canned goods	12%	11%	4%	5%	8%	10%	17%	13%	11%	12%	23%	13%	6%	8%	16%	16%	13%	30%
Frozen food	9%	16%	6%	10%	9%	10%	31%	11%	10%	16%	29%	23%	12%	6%	10%	14%	8%	36%
Cleaning products	8%	15%	5%	5%	3%	10%	5%	12%	8%	9%	11%	20%	5%	9%	18%	3%	10%	4%

# Access to the usual products and services as normal in the past 2 weeks

Australia and the UK have the highest levels claiming that their access to the products and services they would normally buy/use was disrupted. Hong Kong, Korea and Thailand have experienced minimal disruption during the past 2 weeks.





















■ Yes ■ No

■ 0 – 7: Not at all important ■ 8-10 Extremely important

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

In Japan, there are few consequences of not being able to access products and services as normal, followed by France and Germany. Indonesia, Philippines and Thailand state the highest levels of changes in buying behaviour.

	EUROPE					THE AMERICAS			ASIA									
																		
Had to shop around for something in physical stores	28%	19%	12%	23%	21%	32%	21%	25%	24%	28%	37%	44%	30%	9%	17%	13%	36%	40%
Gone without something I'd usually buy	26%	20%	16%	26%	26%	30%	17%	27%	22%	12%	18%	14%	12%	9%	8%	34%	15%	23%
Paid more for something than I usually would	23%	18%	15%	35%	24%	29%	34%	27%	28%	30%	39%	34%	15%	10%	20%	30%	38%	41%
Tried a new product	19%	17%	14%	22%	22%	26%	22%	21%	30%	43%	38%	41%	37%	7%	7%	20%	25%	34%
Tried buying from a new brand	18%	17%	23%	15%	27%	23%	25%	19%	27%	46%	38%	41%	40%	4%	5%	22%	37%	29%
Shopped online for something I'd usually buy in a physical store	15%	14%	14%	21%	16%	29%	19%	15%	31%	32%	30%	20%	40%	11%	24%	46%	31%	32%
Had to shop around for something online	14%	11%	16%	26%	9%	25%	19%	14%	23%	27%	33%	15%	49%	7%	33%	23%	37%	29%
Shopped in a physical store for something I'd usually buy online	9%	7%	6%	7%	10%	18%	6%	9%	14%	14%	23%	25%	24%	3%	8%	13%	14%	33%
Paid less for something than I usually would	6%	7%	5%	5%	6%	17%	8%	6%	12%	13%	21%	17%	25%	3%	4%	7%	10%	20%
None of the above	27%	37%	40%	20%	27%	22%	25%	30%	21%	10%	6%	5%	2%	61%	34%	14%	7%	6%
Had to shop around for something in physical stores	28%	19%	12%	23%	21%	32%	21%	25%	24%	28%	37%	44%	30%	9%	17%	13%	36%	40%

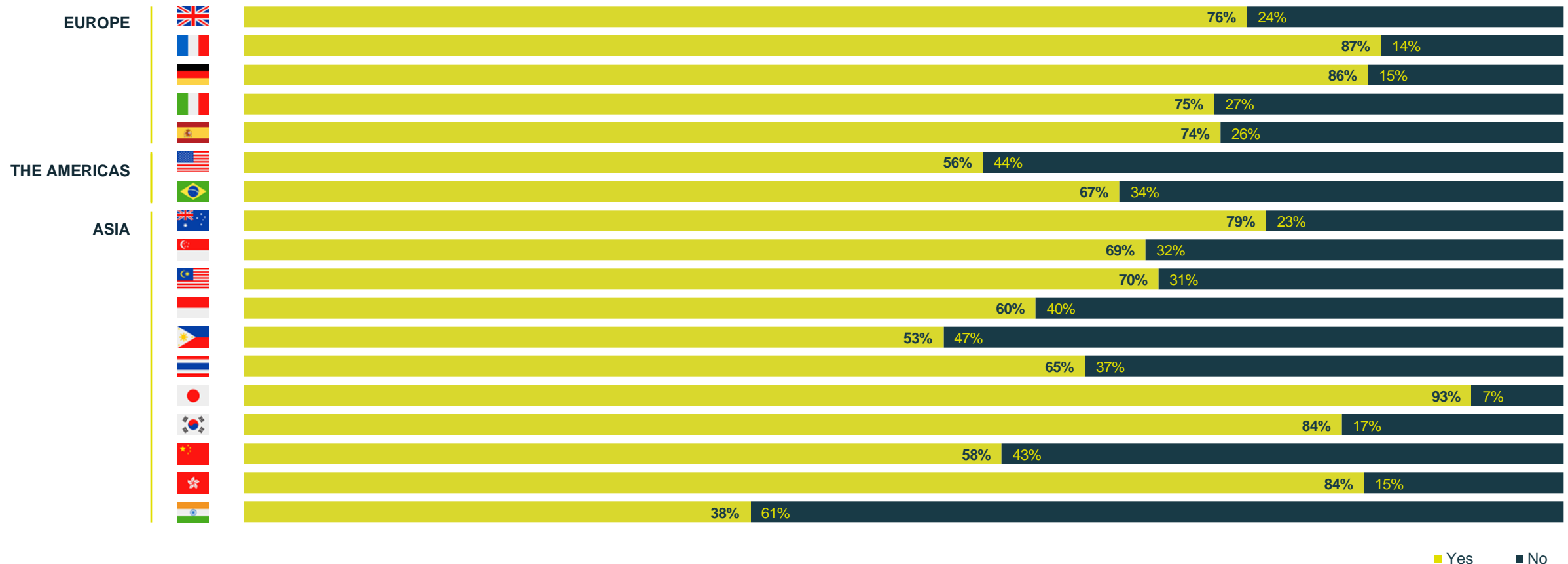


# Importance of the brand in deciding how to seek an alternative when not able to access the usual products and services

In Europe, Australia, Japan, Hong Kong and Korea, brand is less important when not able to access the usual products or services. India, USA and the Philippines are more brand conscious.





















## RETAILERS (E.G.: SUPERMARKETS, HIGH STREET SHOPS, ONLINE SHOPS)



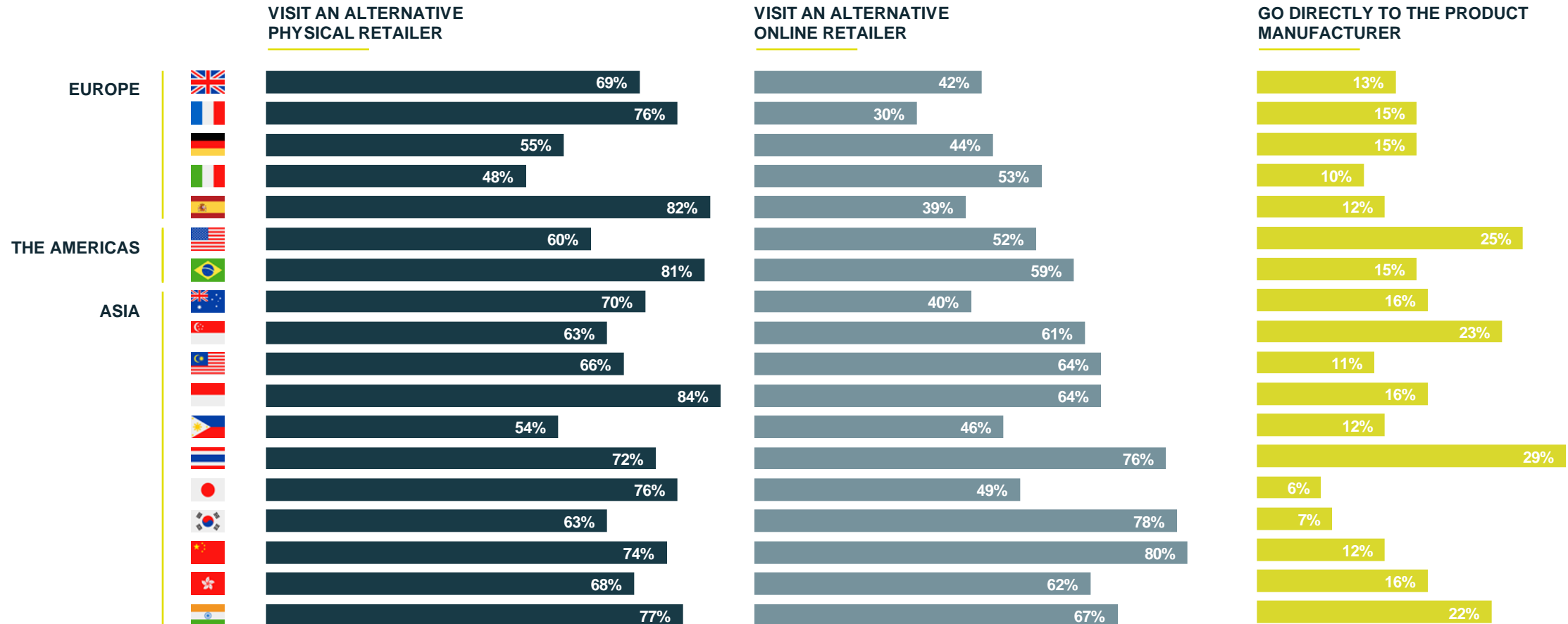
# Will to buy a similar product from a different brand if one's preferred brand wasn't available

Japan and Korea are least ready to switch brands when their preferred product isn't available. In Thailand, Brazil and Italy we see the highest proportions who are willing to switch brands but will stay within the category.

	EUROPE					THE AMERICAS		ASIA										
																		
Personal toiletries	30%	43%	37%	51%	35%	35%	51%	29%	33%	35%	48%	37%	45%	12%	27%	33%	39%	36%
Canned foods	24%	36%	26%	42%	27%	27%	36%	26%	35%	40%	39%	33%	40%	14%	26%	25%	32%	31%
Soft drinks	24%	37%	28%	38%	35%	32%	39%	22%	25%	30%	34%	25%	38%	18%	23%	29%	31%	36%
Alcoholic drinks	24%	35%	29%	34%	30%	24%	35%	24%	25%	13%	15%	21%	24%	22%	30%	27%	21%	27%
Household cleaning products	23%	34%	31%	44%	28%	31%	45%	22%	33%	43%	41%	36%	42%	13%	23%	30%	32%	40%
Paper goods (e.g. toilet paper, kitchen roll, baby wipes)	23%	34%	29%	39%	27%	32%	45%	25%	31%	34%	40%	34%	43%	16%	27%	33%	37%	36%
Fruit and vegetables	21%	30%	27%	33%	27%	27%	31%	22%	27%	30%	29%	26%	36%	11%	18%	19%	21%	30%

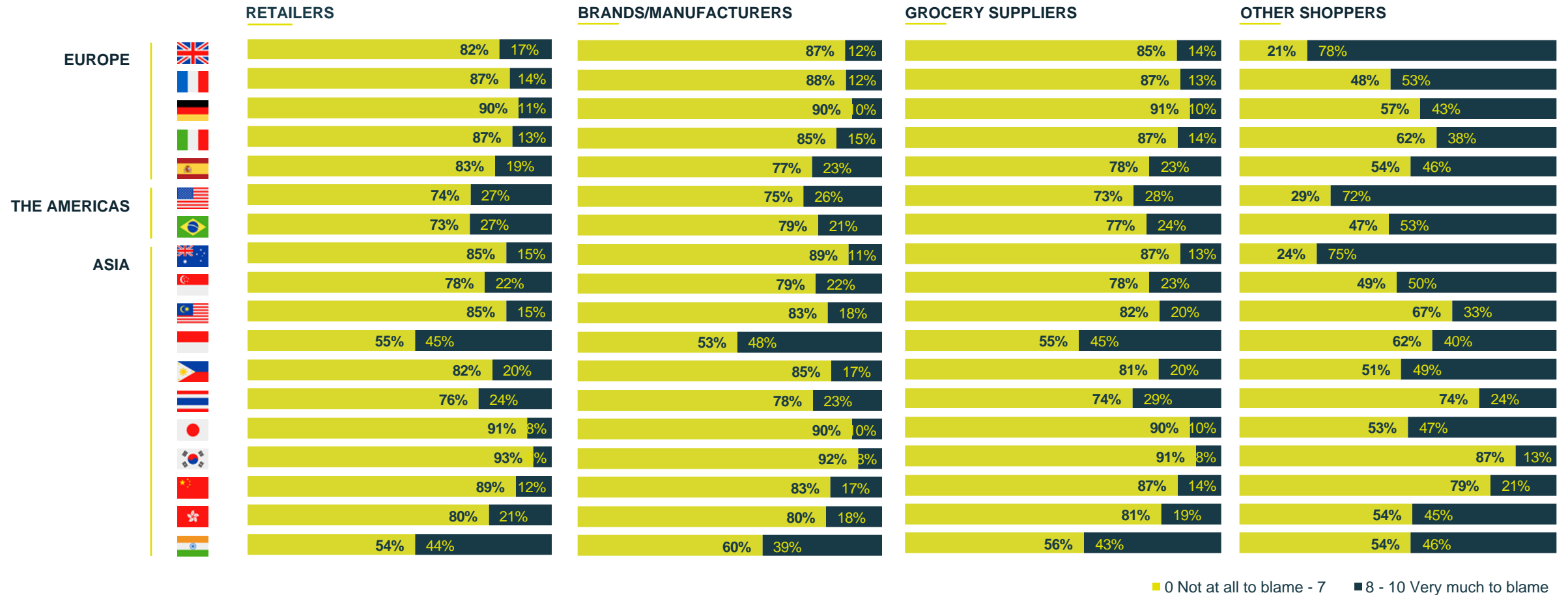
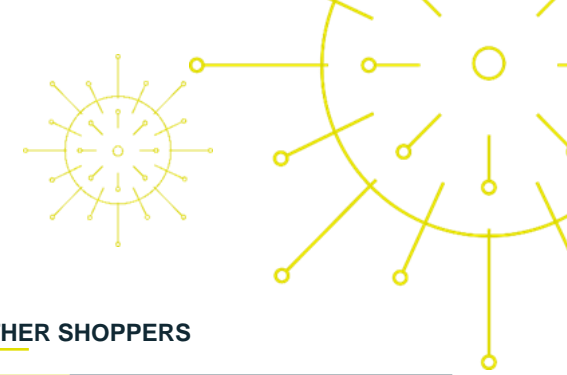
# Alternatives if not able to get one's preferred product from the usual shopping place

In Australia, Japan and the Philippines, visiting an alternative retailer is the preferred choice. Korea and China visit an alternative on-line retailer and Thailand and USA also go directly to the manufacturer



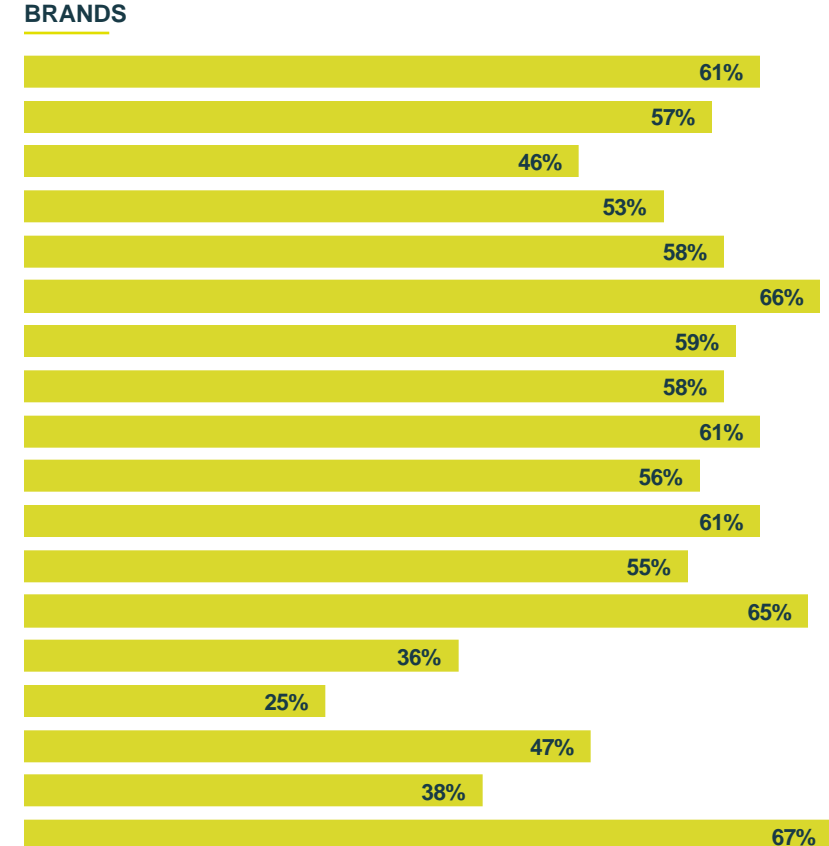
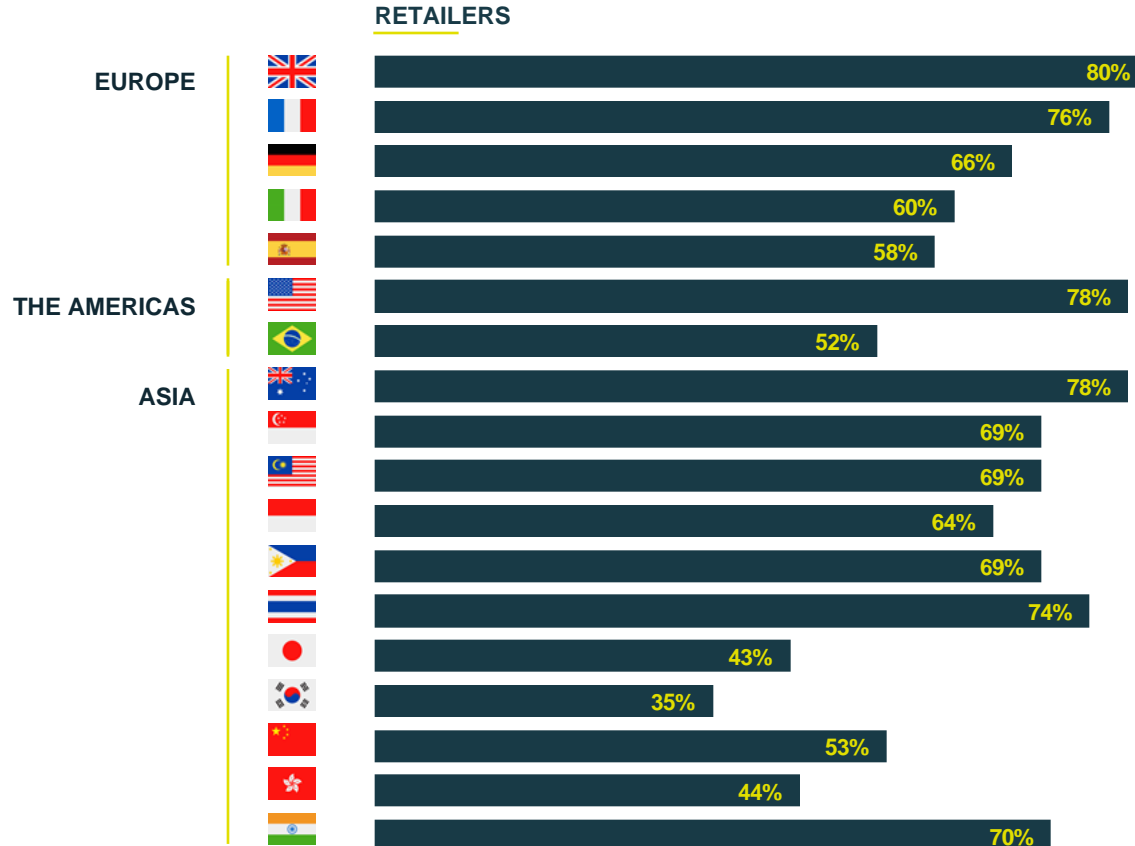
# Blame regarding shortages of products since the outbreak of the coronavirus

In Indonesia, a lot of blame goes to retailers, manufacturers and suppliers. While UK, Australia and the USA tend to blame other shoppers for stockpiling.



# Feeling to be getting sufficient communications about the impact of coronavirus

In the UK, USA and Australia consumers feel they get sufficient communication about the impact from retailers; while India, Thailand and USA also get decent communication directly from brands

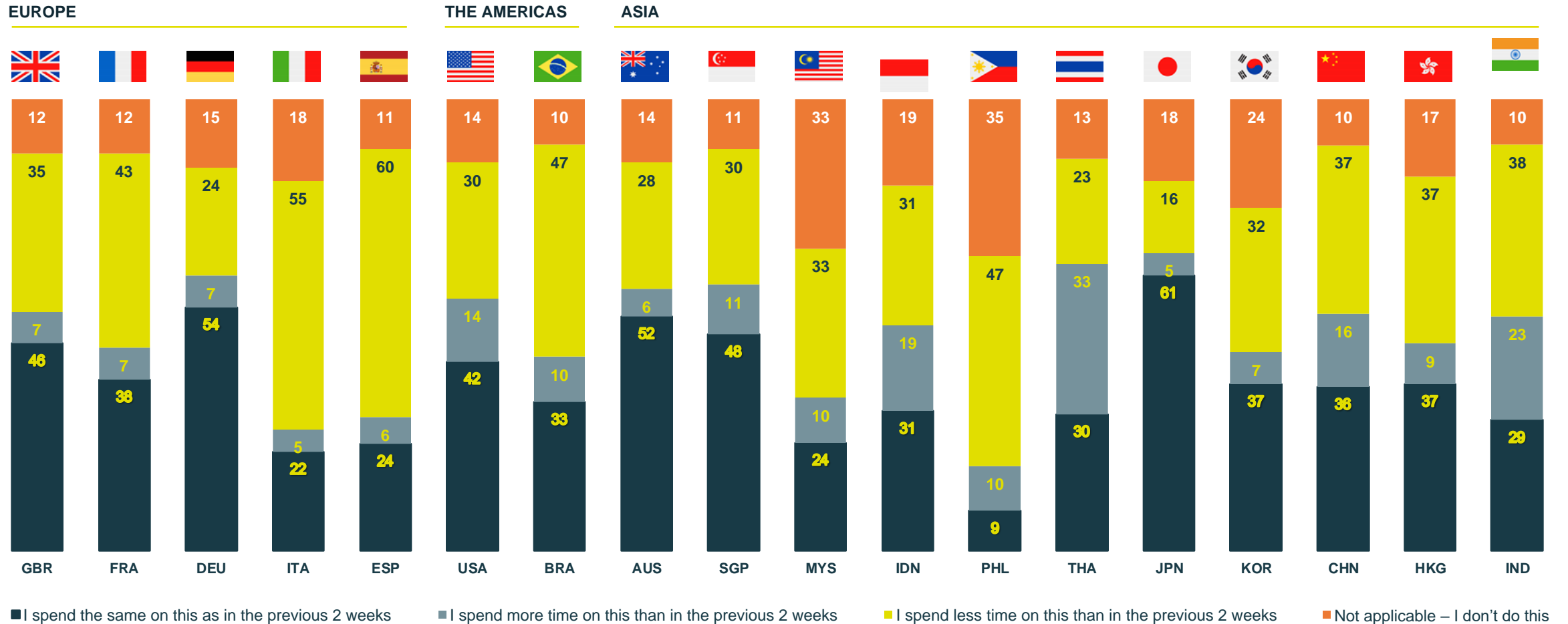


# Beauty

# Change over the time spent on choosing what to wear in the past 2 weeks

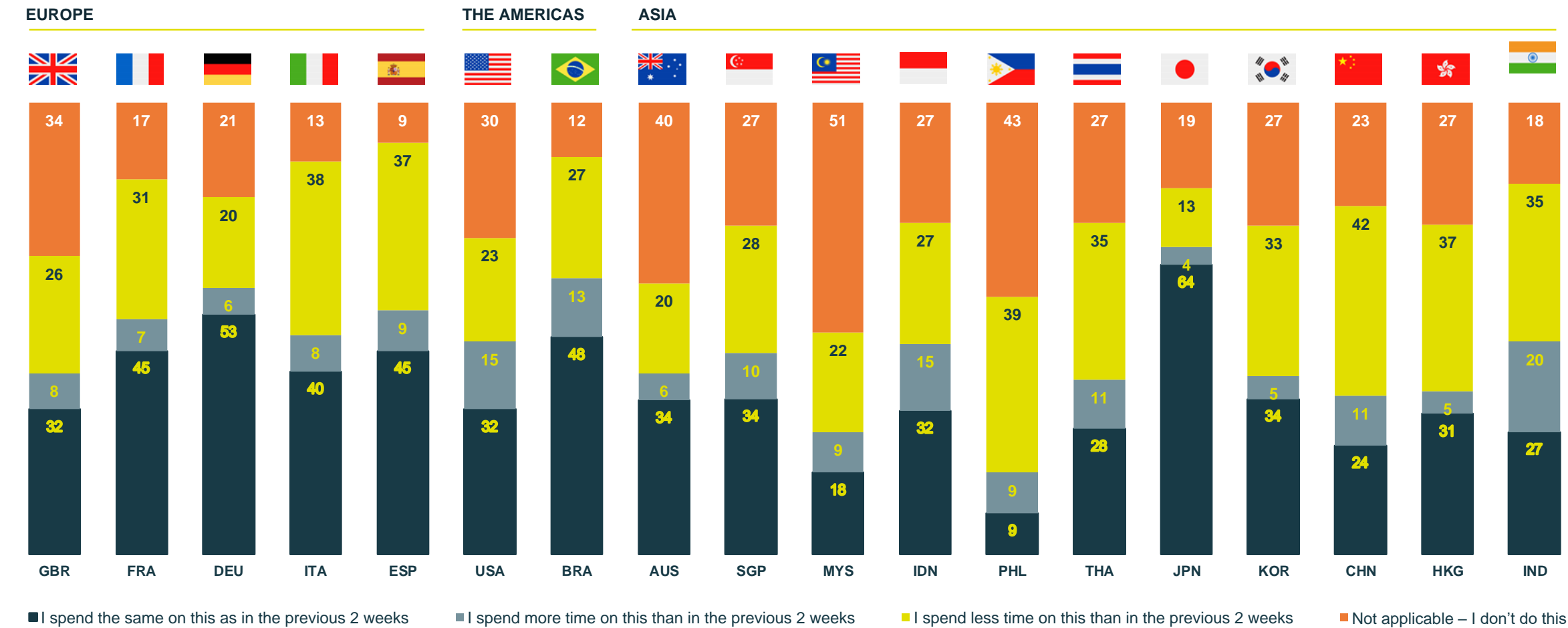
All countries report they spend less time choosing what to wear in the past 2 weeks; though the highest proportion is in Spain and Italy.

On the other hand, there is a good proportion of people who claim they spend more time choosing what to wear in some Asian markets, particularly Thailand.



# Change over the time spent on styling one's hair in the past 2 weeks

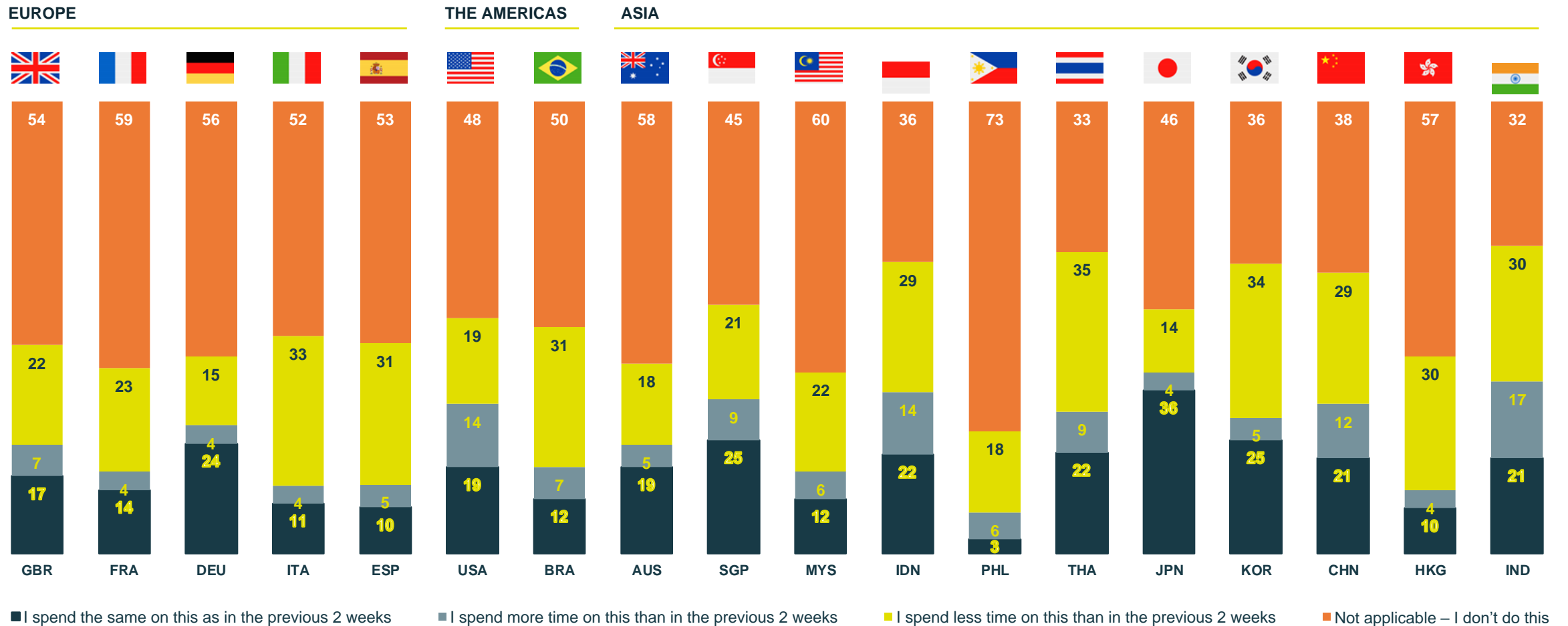
When it comes to styling one's hair, China, Philippines, Italy, Spain and Hong Kong consumers report less time spent on this activity.





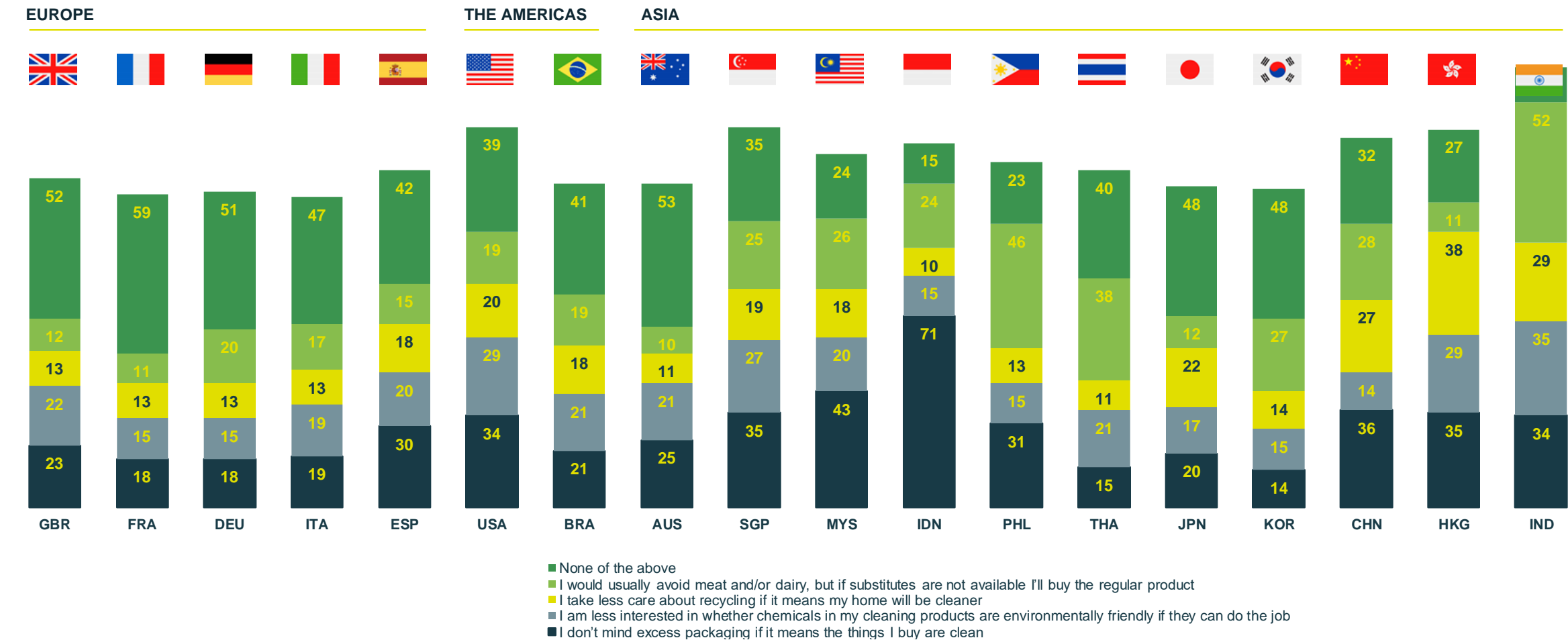
# Change over the time spent on **putting on make up** in the past 2 weeks

Generally, consumers spent less time on putting on make up, especially in Thailand, Korea and Italy.



# Interest in environmental issues

In these times, consumers are less environmentally conscious. In Indonesia, consumers are less concerned about excess packaging if it keeps produce clean. In India and the Philippines, high proportions of consumers who usually don't buy meat or dairy, would buy the regular product if a substitute is unavailable.



# Thank you!

