GLOBAL BAROMETER:

Consumer Reactions to COVID-19

Second Wave of Data

toluna harris interactive KURUNDATA

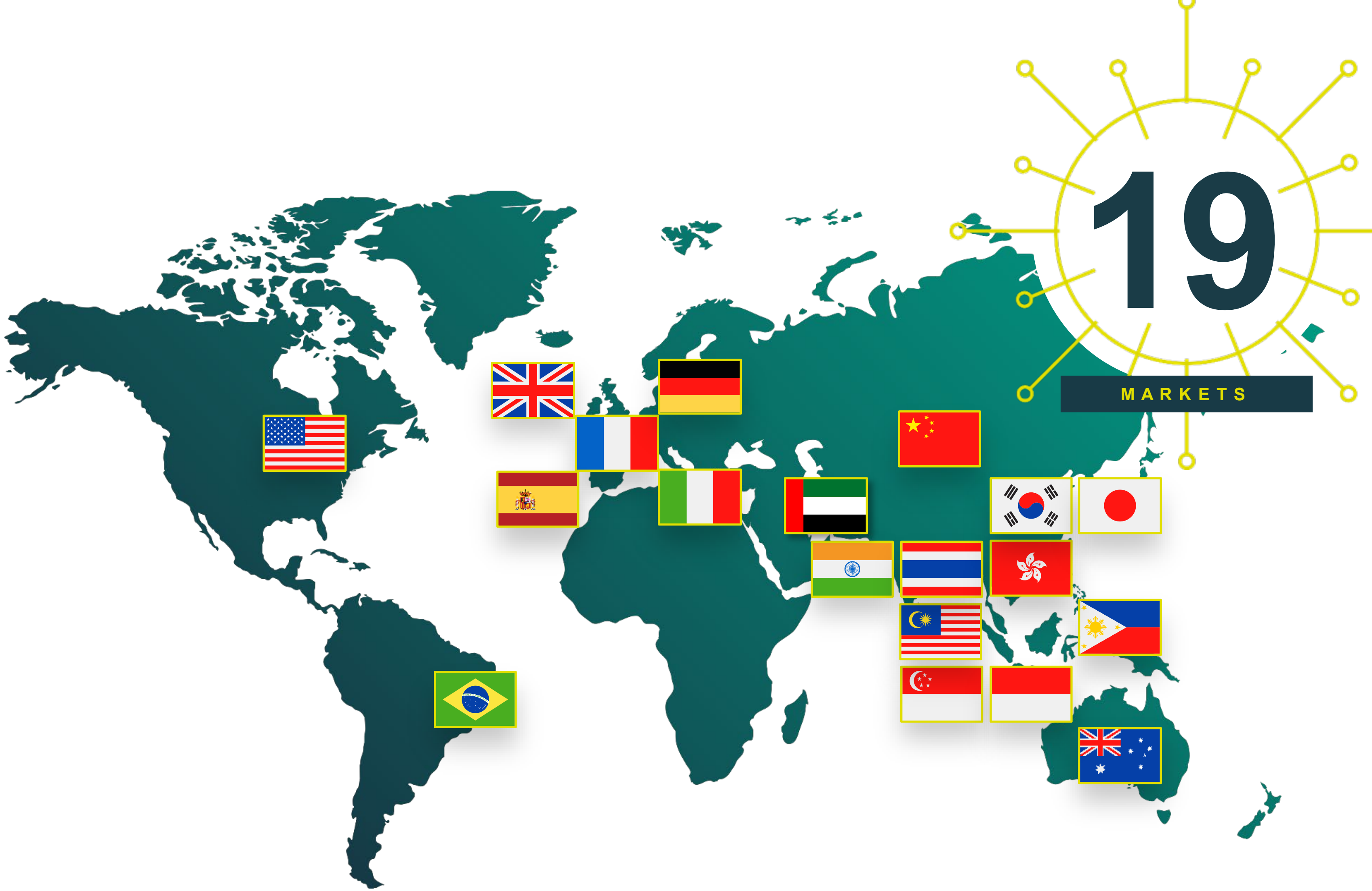
About this study

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 report covers 19 markets.

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



Wave 2: 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	1,002	9th – 14th April 2020
France	1,053	9th – 16th April 2020
Germany	1,011	9th – 14th April 2020
Italy	1,253	9th – 16th April 2020
Spain	1,071	9th – 16th April 2020

MARKET	COMPLETED INTERVIEWS	FIELDWORK DATES
Australia	1,003	9th – 14th April 2020
Singapore	535	9th – 14th April 2020
Malaysia	515	9th – 16th April 2020
Indonesia	604	9th – 16th April 2020
Philippines	548	9th – 16th April 2020
Thailand	585	9th – 16th April 2020
Japan	1,030	9th – 14th April 2020
Korea	991	9th – 16th April 2020
China	1,023	9th – 14th April 2020
Hong Kong	605	9th – 16th April 2020
India	1,021	9th – 14th April 2020
UAE	561	9th – 16th April 2020

MARKET	COMPLETED INTERVIEWS	FIELDWORK DATES
United States	1,047	9th – 14th April 2020
Brazil	1,148	9th – 16th April 2020

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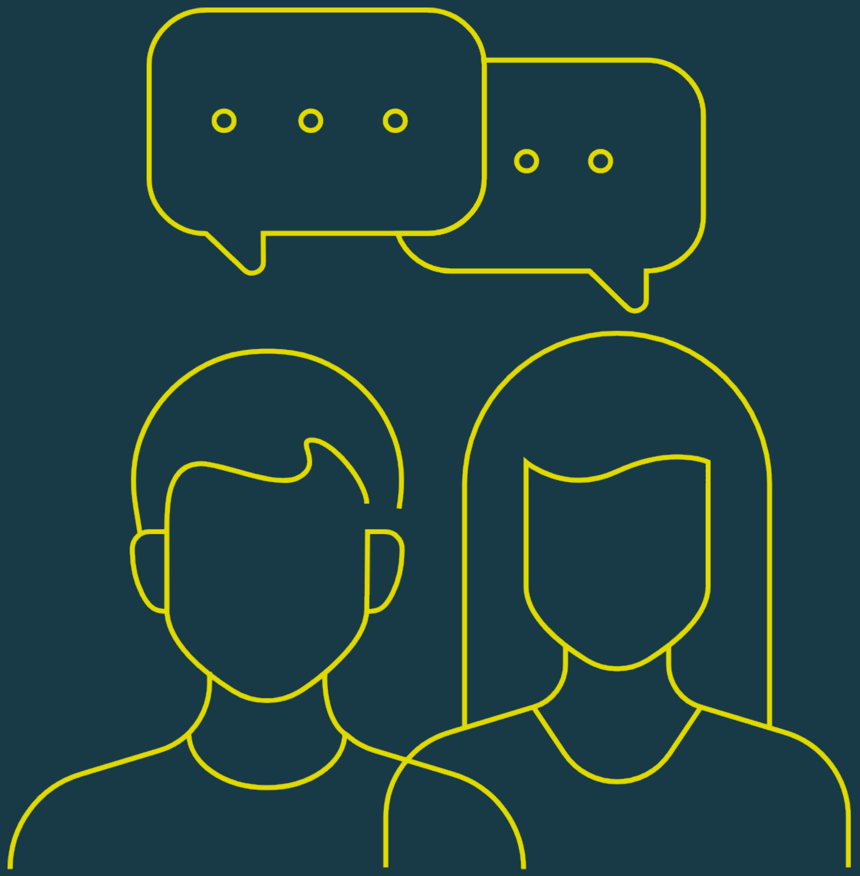
Consumers reactions to the Coronavirus: Europe



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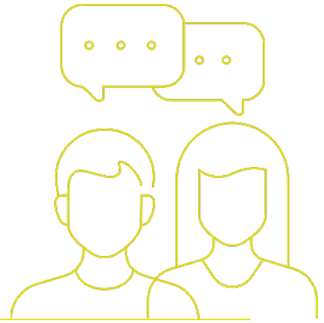
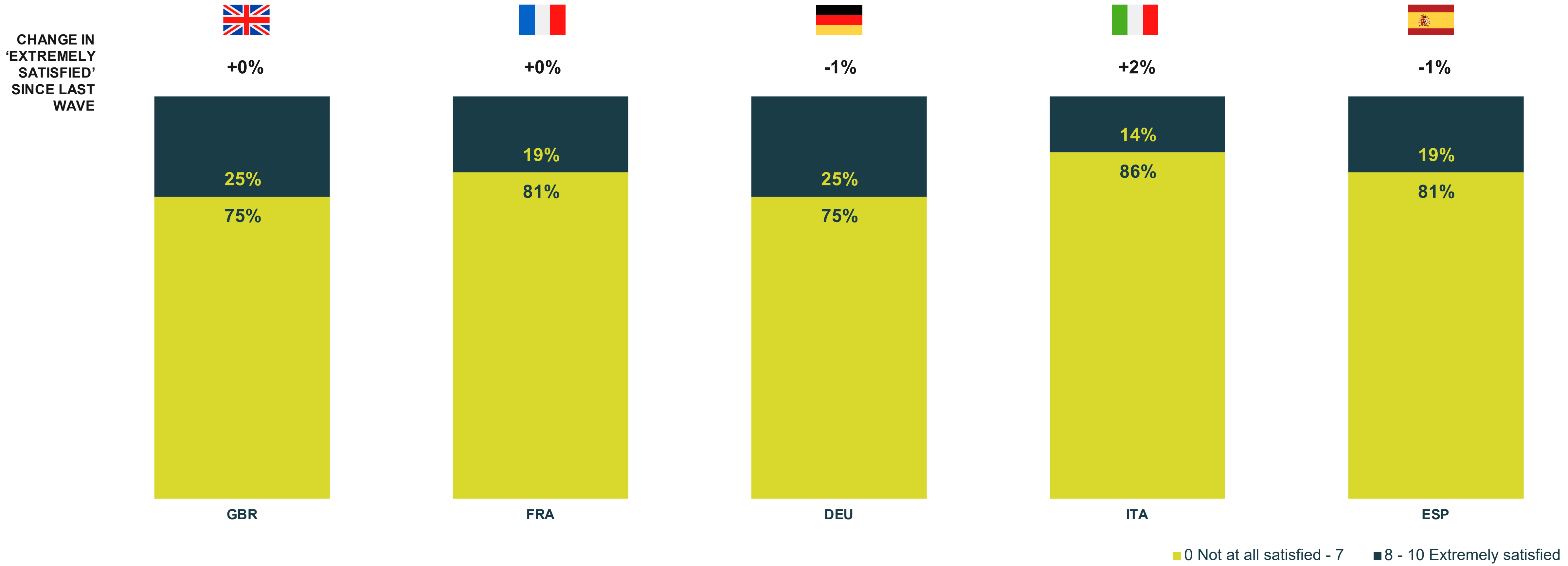
Level of satisfaction with life over the past 2 weeks

Satisfaction is highest in the UK and Germany, and lowest (though increasing) in Italy.

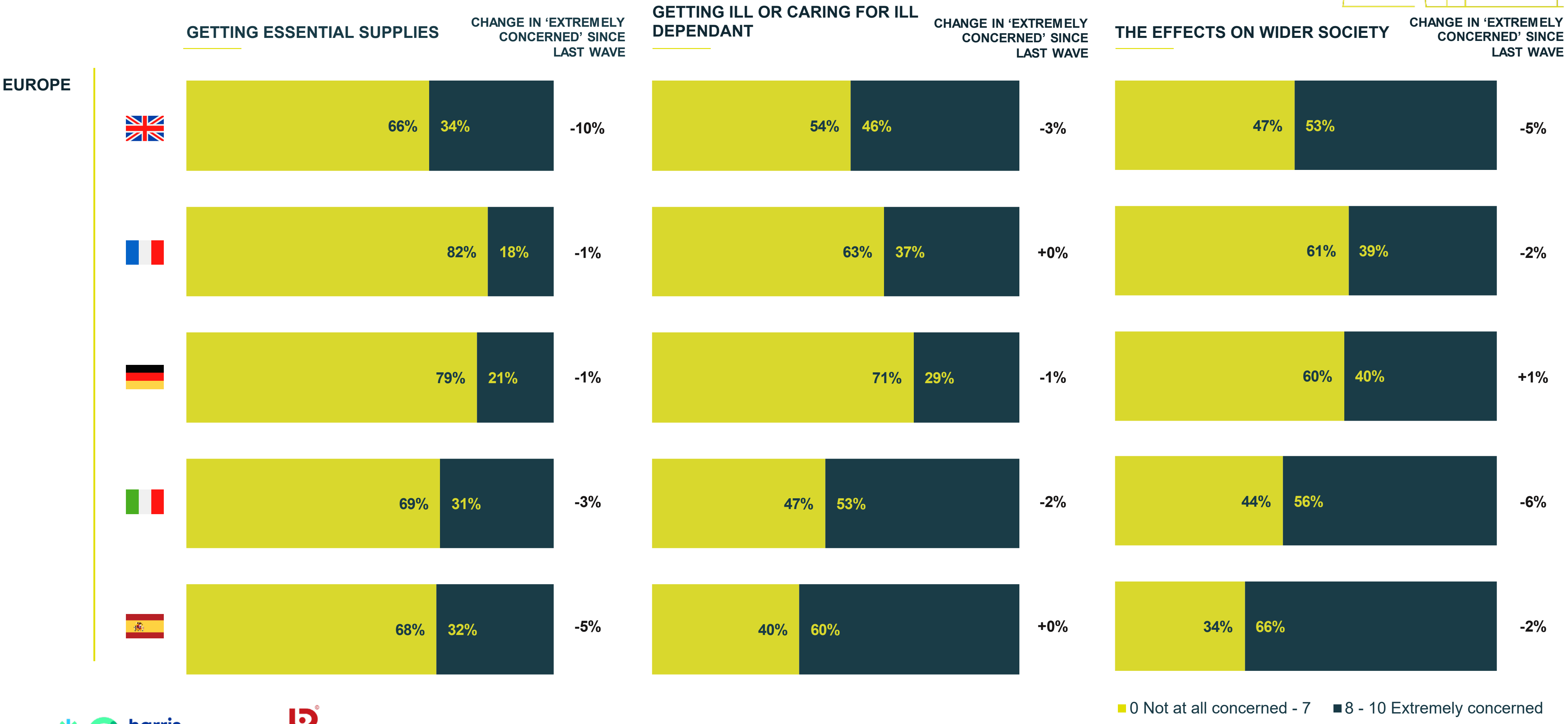


EUROPE



Level of concern with different aspects because of the Coronavirus

Concerns seem to be alleviating across Europe, with a notable drop around getting essential supplies in the UK and Spain plus effects on wider society in Italy and the UK.



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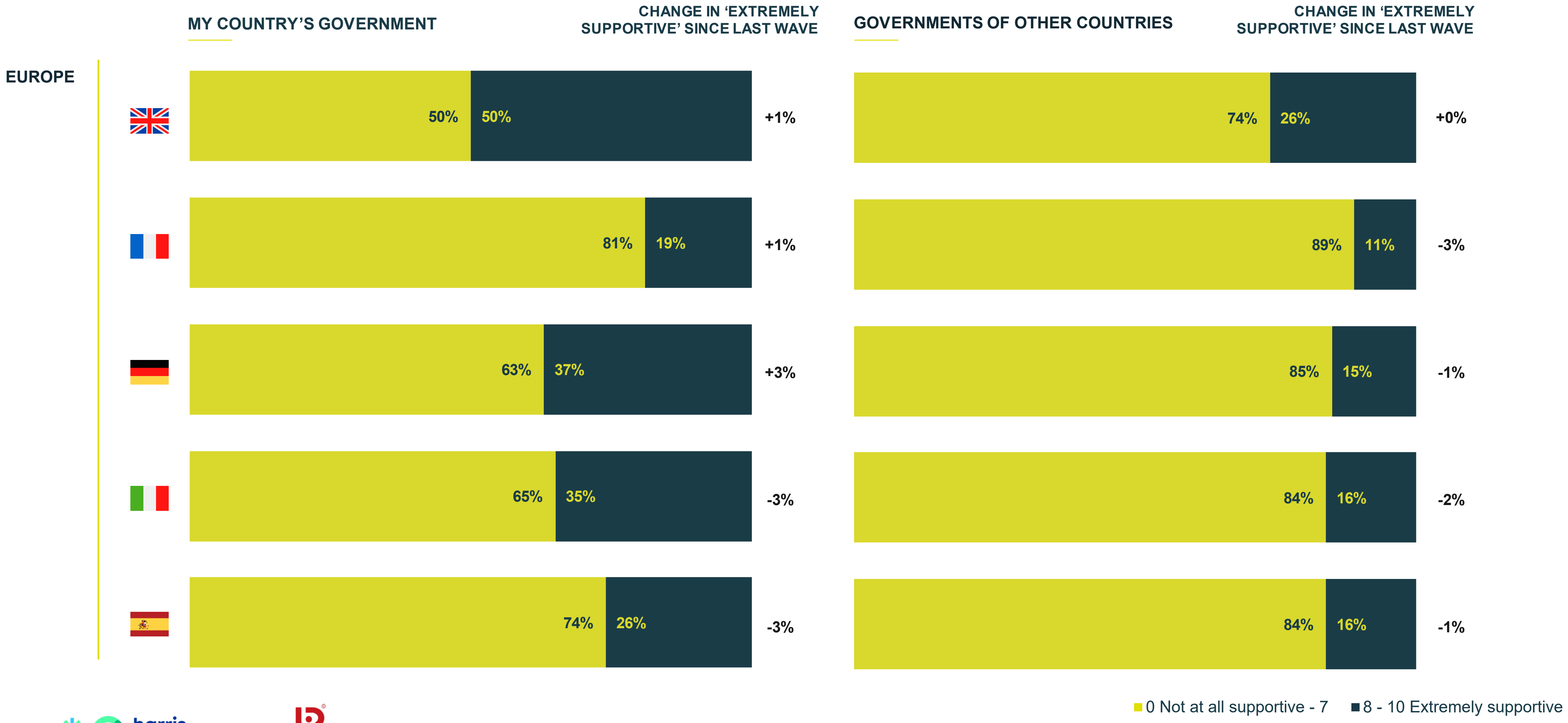
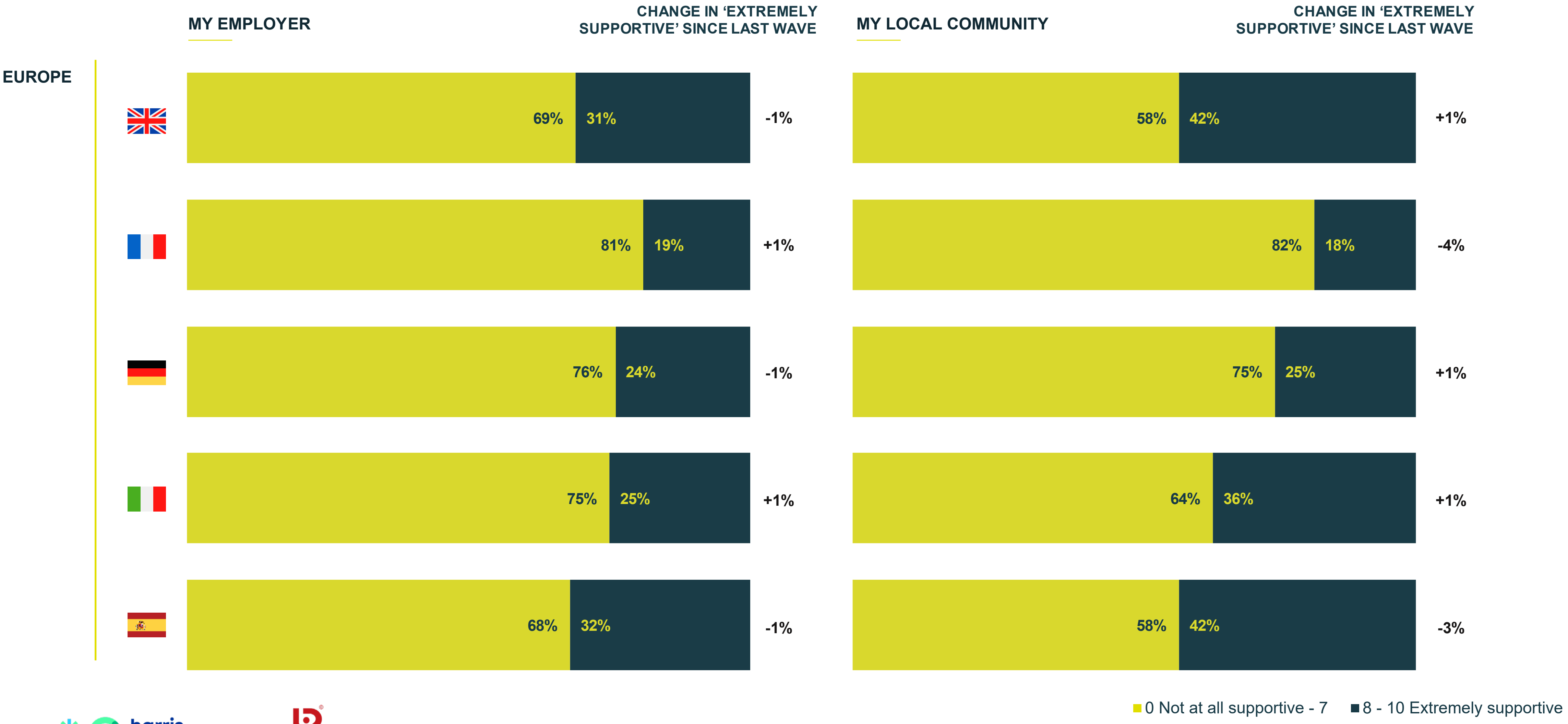
Level of support given in response to the Coronavirus outbreak

Support from both domestic and foreign governments is ranked by far the highest in the UK, followed by Germany and Spain. The least support is felt in France.



Level of support given in response to the Coronavirus outbreak

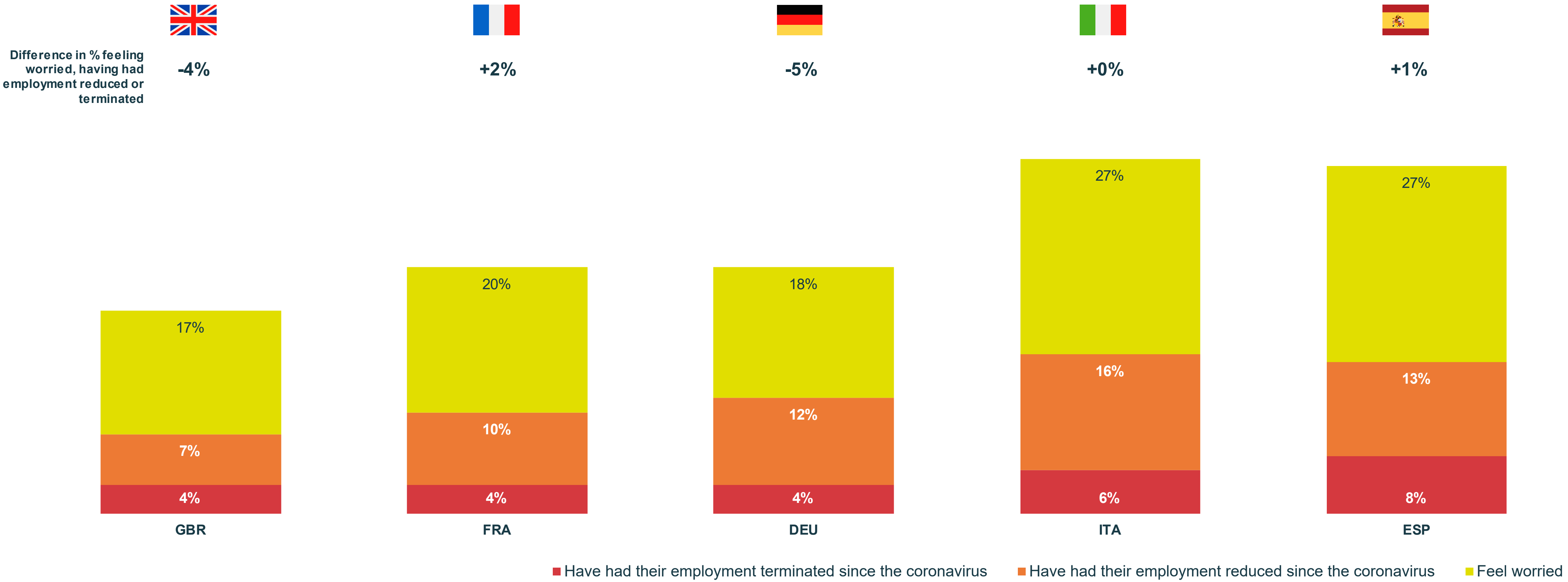
Spain is the only country to rank employers more supportive than the government, while in France both receive equally low scores.



Perceived level of security in employment over the past 2 weeks

Job insecurity has decreased notably in the UK and Germany over the past two weeks, remaining highest in Italy and Spain.

EUROPE



Coronavirus restrictions knock-on effects

The UK sees big increases in unhealthy eating and alcohol consumption in the past two weeks, as stress levels drop.

EUROPE

	EATING LESS HEALTHY	Difference from last wave	DRINKING MORE ALCOHOL	Difference from last wave	SMOKING MORE CIGARETTES	Difference from last wave	TAKING LESS EXERCISE	Difference from last wave	FEEL MORE STRESSED	Difference from last wave	LESS CONCERNED WITH ENVIRONMENTAL ISSUES	Difference from last wave
UK	24%	+5%	18%	+6%	10%	+2%	35%	+1%	41%	-7%	13%	+2%
France	21%	+2%	9%	-1%	12%	+3%	43%	-1%	41%	+2%	11%	+2%
Germany	17%	+3%	9%	+1%	10%	+0%	28%	-2%	27%	-1%	8%	+0%
Italy	31%	+4%	9%	+2%	19%	+2%	53%	-1%	51%	-1%	12%	+2%
Spain	27%	+1%	11%	+2%	24%	+5%	52%	-1%	47%	+3%	13%	+0%

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

Activities likely to undertake once the Coronavirus crisis is over

The most anticipated actions post-crisis are holidays for Italians and Brits, and more everyday trips out for the French and Spanish.

EUROPE	Treat myself and family to a holiday abroad	Difference from last wave	Treat myself and family to a holiday in my country	Difference from last wave	Buy something of significant value	Difference from last wave	Spend more money generally	Difference from last wave	Go out more, such as to eat or the cinema	Difference from last wave
UK	25%	+4%	29%	+5%	9%	+2%	14%	+2%	34%	+6%
France	18%	+1%	33%	+5%	5%	+1%	10%	+1%	36%	-1%
Germany	23%	+3%	23%	+1%	6%	+0%	8%	+0%	27%	+7%
Italy	21%	-1%	44%	+5%	11%	+4%	10%	+1%	34%	-1%
Spain	17%	-3%	32%	-4%	8%	+0%	8%	-4%	36%	-2%

Lowest scoring country for each measure

Highest scoring country for each measure

Activities likely to undertake once the Coronavirus crisis is over

Germans are least likely to anticipate attitude changes post-crisis.

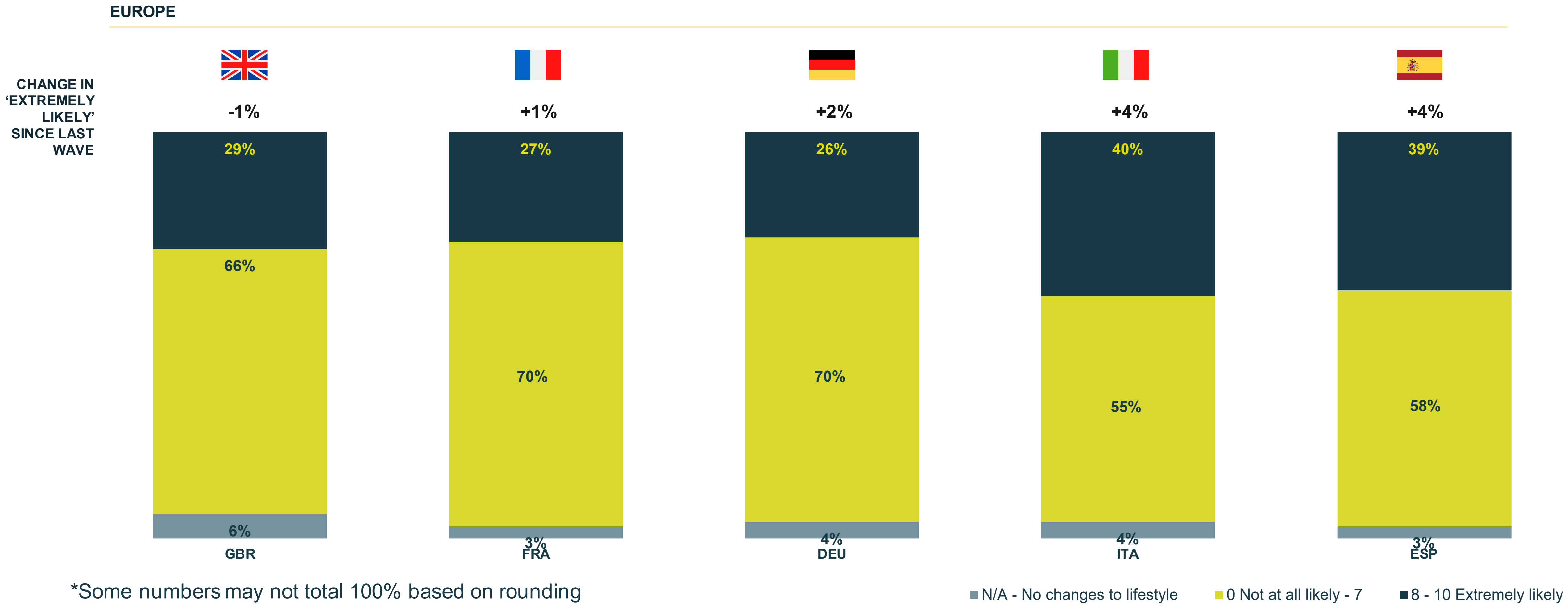
EUROPE	Be less materialistic	Difference from last wave	Be more optimistic about the future	Difference from last wave	Be more health conscious	Difference from last wave	Be more environmentally conscious	Difference from last wave	Save money to prepare for a rainy day	Difference from last wave	Take out insurance to cover illness/ loss of holidays/ etc.	Difference from last wave
🇬🇧	19%	-1%	31%	-1%	34%	-1%	22%	+2%	27%	+1%	7%	+0%
🇫🇷	21%	+2%	20%	+0%	34%	+1%	29%	+2%	24%	+3%	5%	+1%
🇩🇪	18%	-2%	21%	-2%	27%	-1%	19%	+0%	21%	-3%	4%	-1%
🇮🇹	24%	-2%	29%	+0%	50%	+0%	35%	-3%	42%	+2%	10%	+2%
🇪🇸	33%	+1%	31%	-1%	46%	-2%	28%	-3%	45%	+5%	9%	-1%

Lowest scoring country for each measure

Highest scoring country for each measure

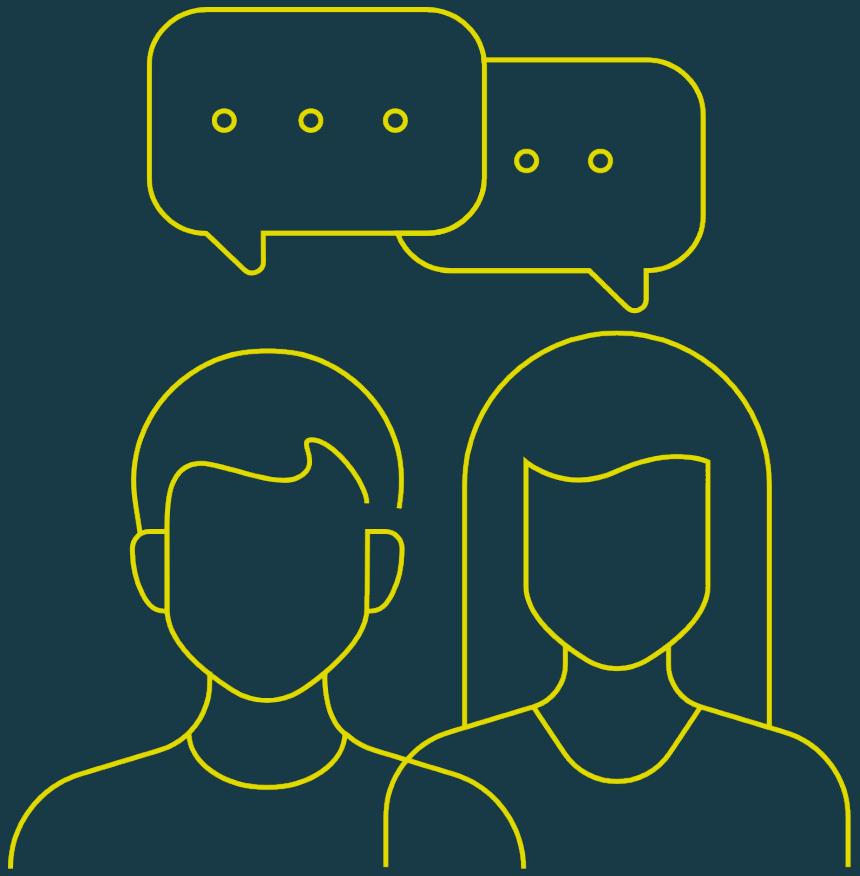
Considering changes you have made to your behaviour since the beginning of coronavirus outbreak, how likely are you to make these part of your lifestyle in the future?

The highest levels on intention to incorporate new lifestyle changes are seen in Italy and Spain, where around two in five anticipate this.



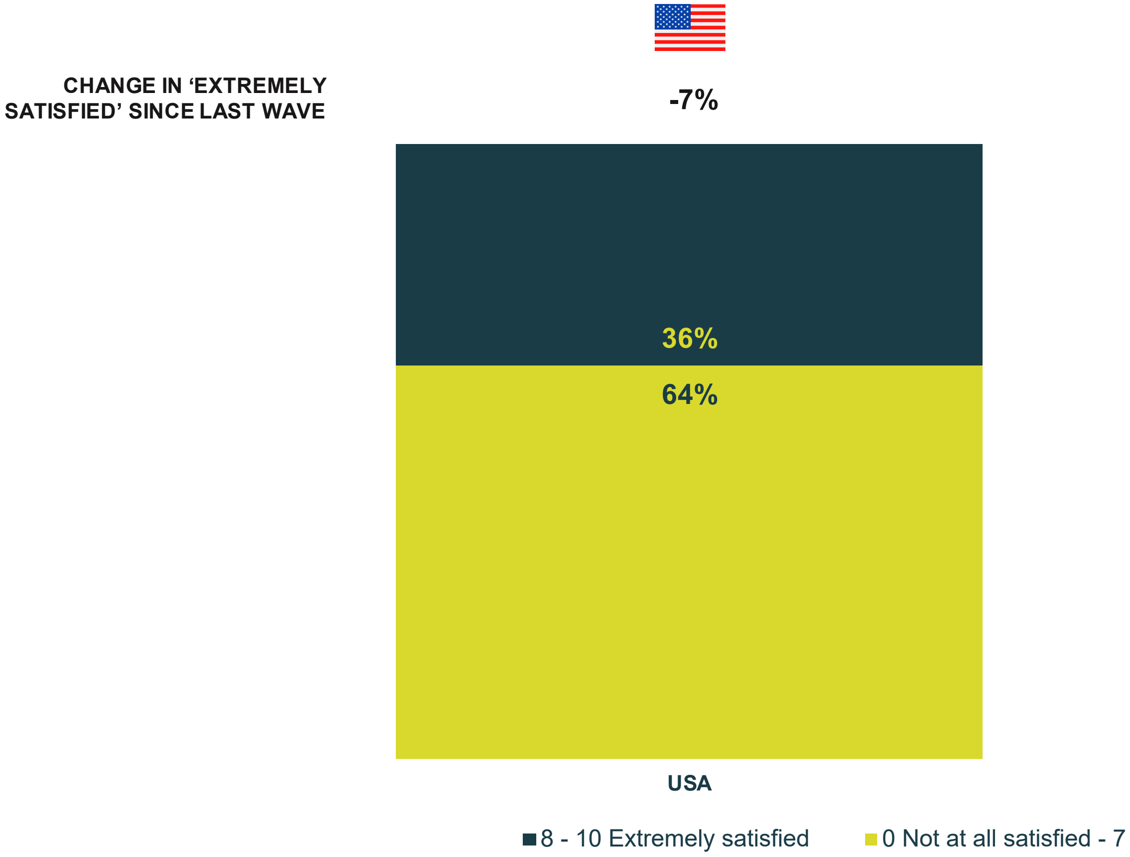
*Some numbers may not total 100% based on rounding

Consumers reactions to the Coronavirus: US



Level of satisfaction with life over the past 2 weeks

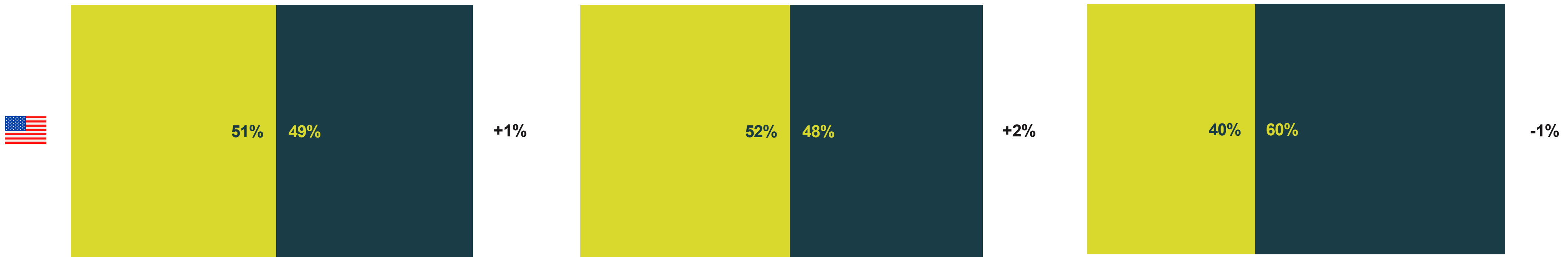
Overall satisfaction with life in the US is decreasing, down 7% in the past fortnight



Level of concern with different aspects because of the Coronavirus

Areas of concerns haven't shifted much in the past two weeks, with the majority of Americans saying they're extremely concerned about the effects on wider society.

GETTING ESSENTIAL SUPPLIES	CHANGE IN 'EXTREMELY CONCERNED' SINCE LAST WAVE	GETTING ILL OR CARING FOR ILL DEPENDANT	CHANGE IN 'EXTREMELY CONCERNED' SINCE LAST WAVE	THE EFFECTS ON WIDER SOCIETY	CHANGE IN 'EXTREMELY CONCERNED' SINCE LAST WAVE



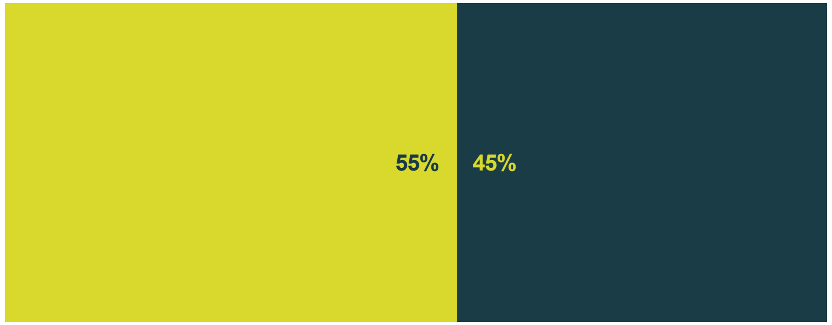
0 Not at all concerned - 7 | 8 - 10 Extremely concerned

Level of support given in response to the Coronavirus outbreak

Over the past two weeks, the local community has taken even more of a lead over domestic and foreign governments and employers in offering individuals support.

MY COUNTRY'S GOVERNMENT

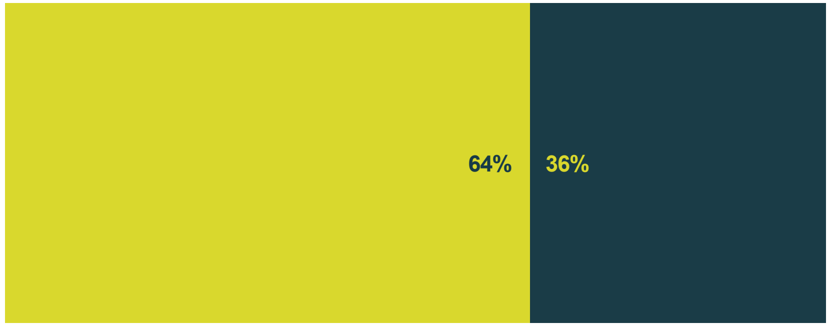
CHANGE IN 'EXTREMELY SUPPORTIVE' SINCE LAST WAVE



-2%

GOVERNMENTS OF OTHER COUNTRIES

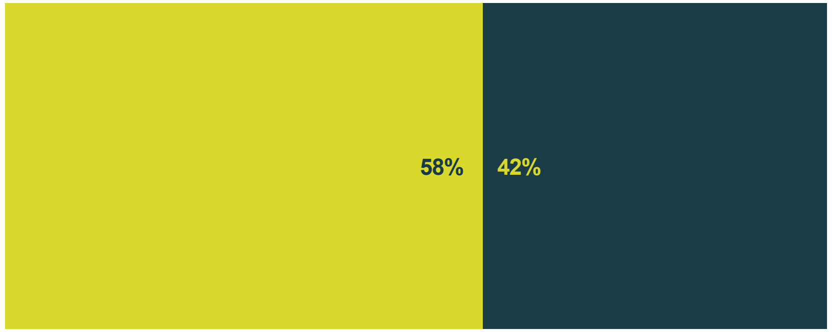
CHANGE IN 'EXTREMELY SUPPORTIVE' SINCE LAST WAVE



+0%

MY EMPLOYER

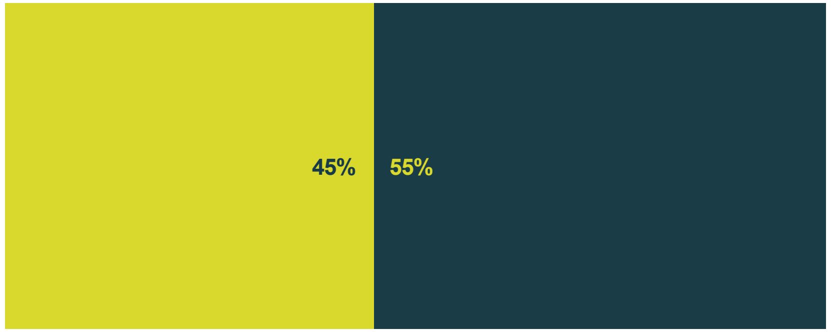
CHANGE IN 'EXTREMELY SUPPORTIVE' SINCE LAST WAVE



+0%

MY LOCAL COMMUNITY

CHANGE IN 'EXTREMELY SUPPORTIVE' SINCE LAST WAVE

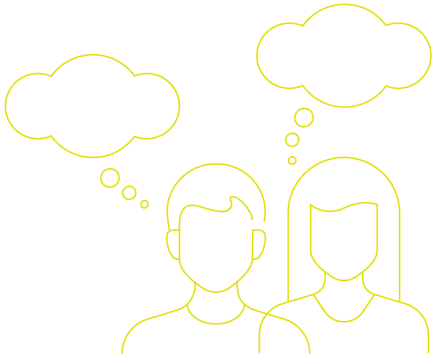


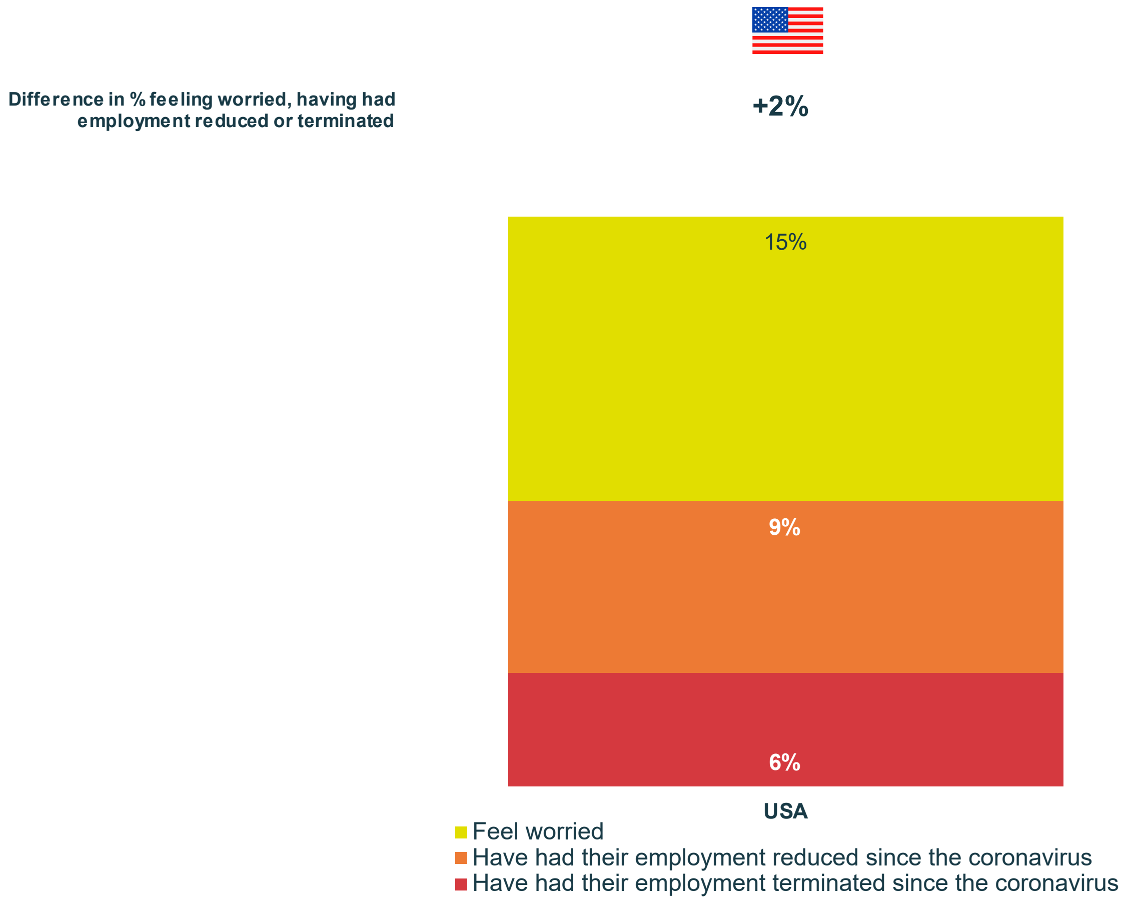
+4%

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

Perceived level of security in employment over the past 2 weeks

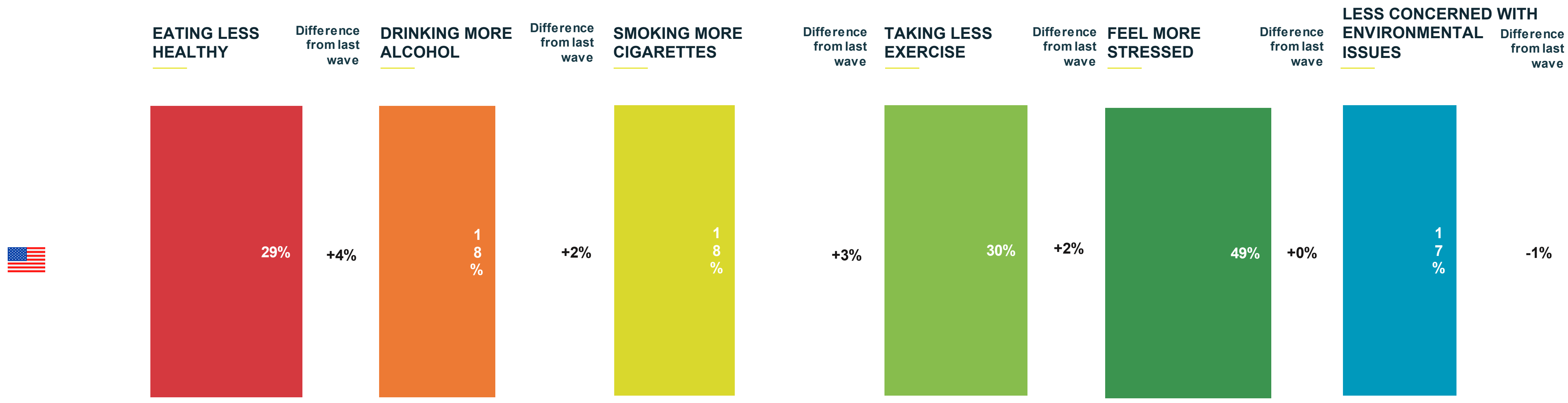
Almost one in three (29%) Americans feel insecure in their employment (including those with reduced or terminated employment).





Coronavirus restrictions knock-on effects

The biggest behavior changes due to restrictions in the past two weeks are eating less healthily and smoking more, while the overall biggest impact remains feeling more stressed.



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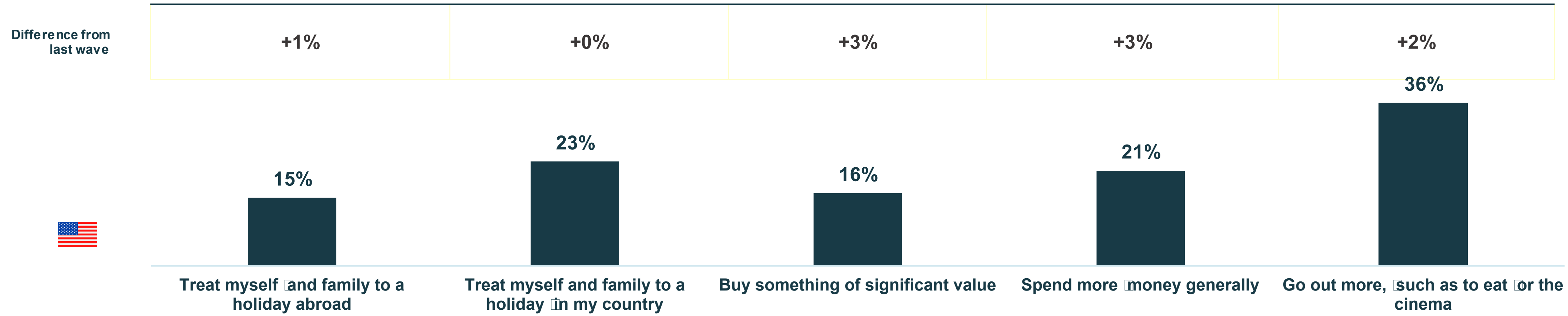
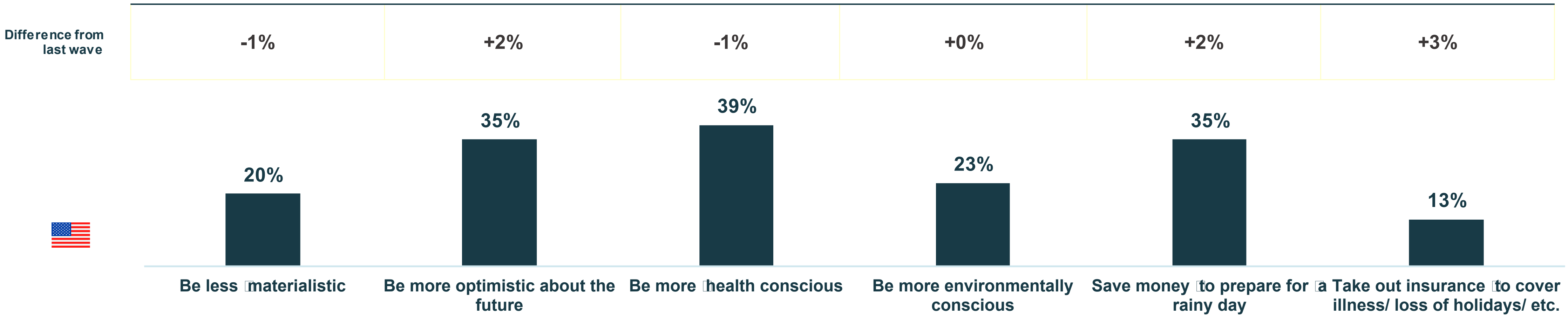
*Note – charts are not in proportion to each other by habit

Activities likely to undertake once the Coronavirus crisis is over

There are some increases in the intentions to splurge once the current crisis is over, with well over a third (36%) intending to do more day-to-day outings. Increased health consciousness is the top attitude change Americans anticipate post-crisis.





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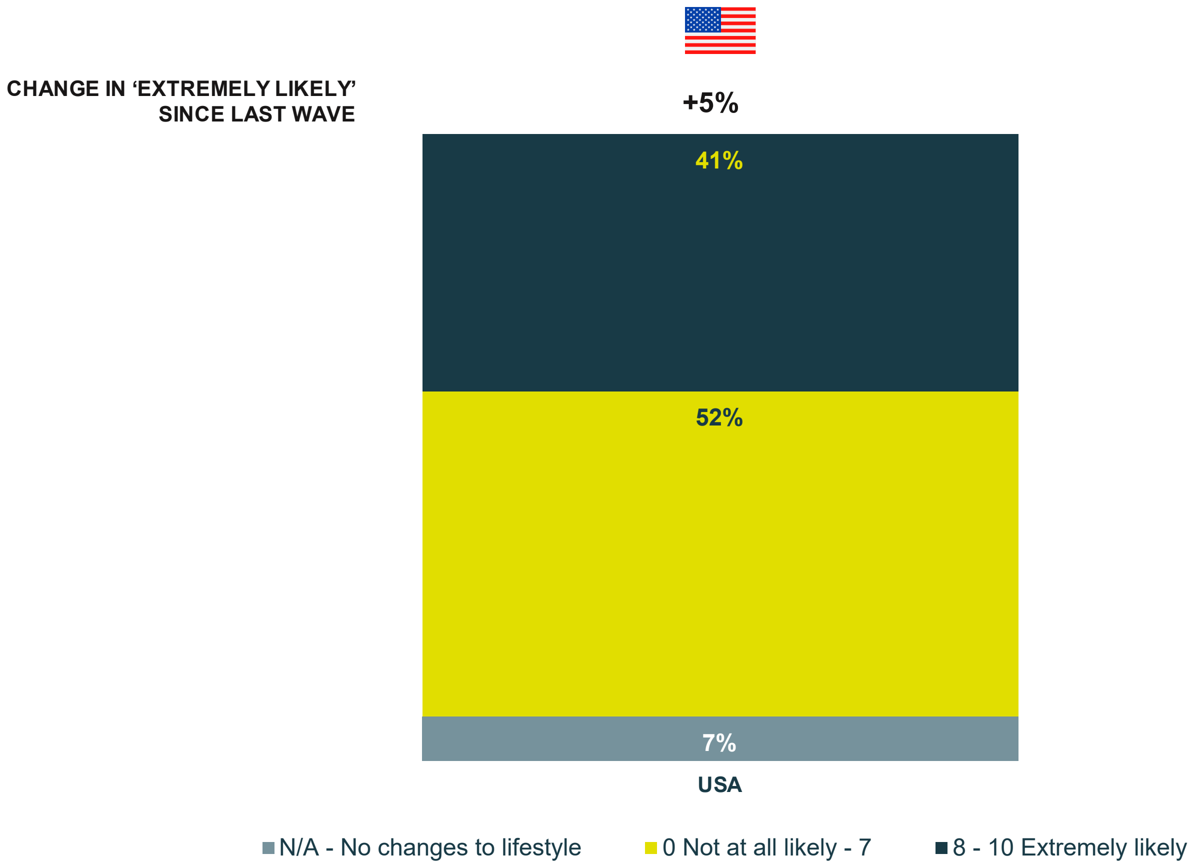
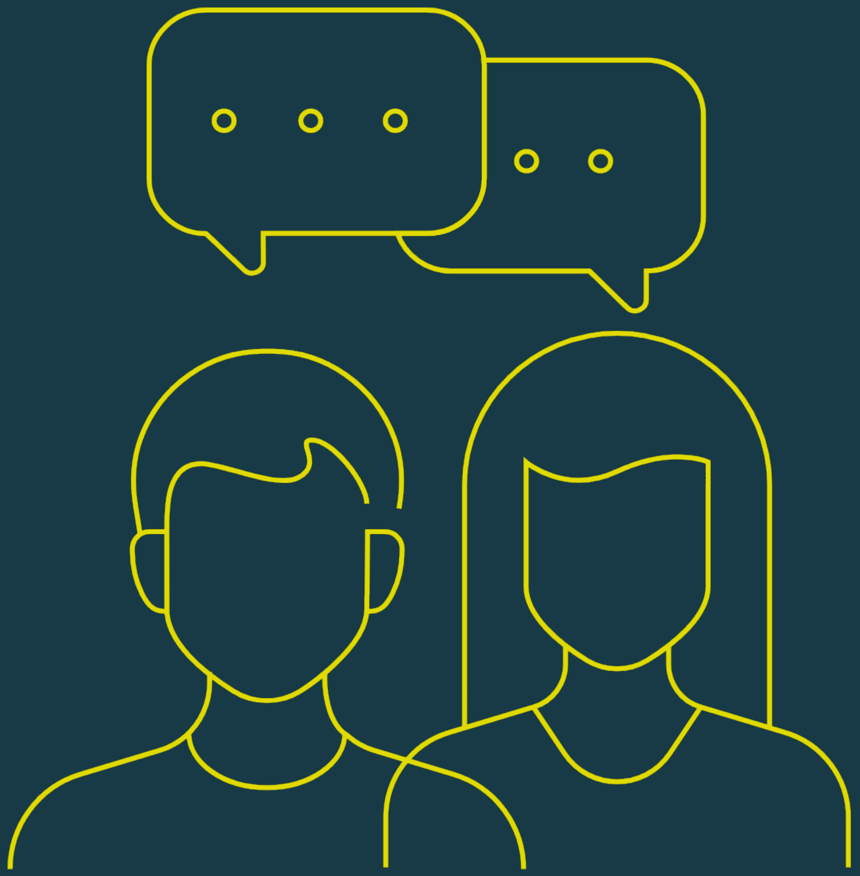
Considering changes you have made to your behaviour since the beginning of coronavirus outbreak, how likely are you to make these part of your lifestyle in the future?

More than two in five (41%) Americans now rate themselves extremely likely to make their current lifestyle changes permanent, up from just over a third (35%) two weeks ago.



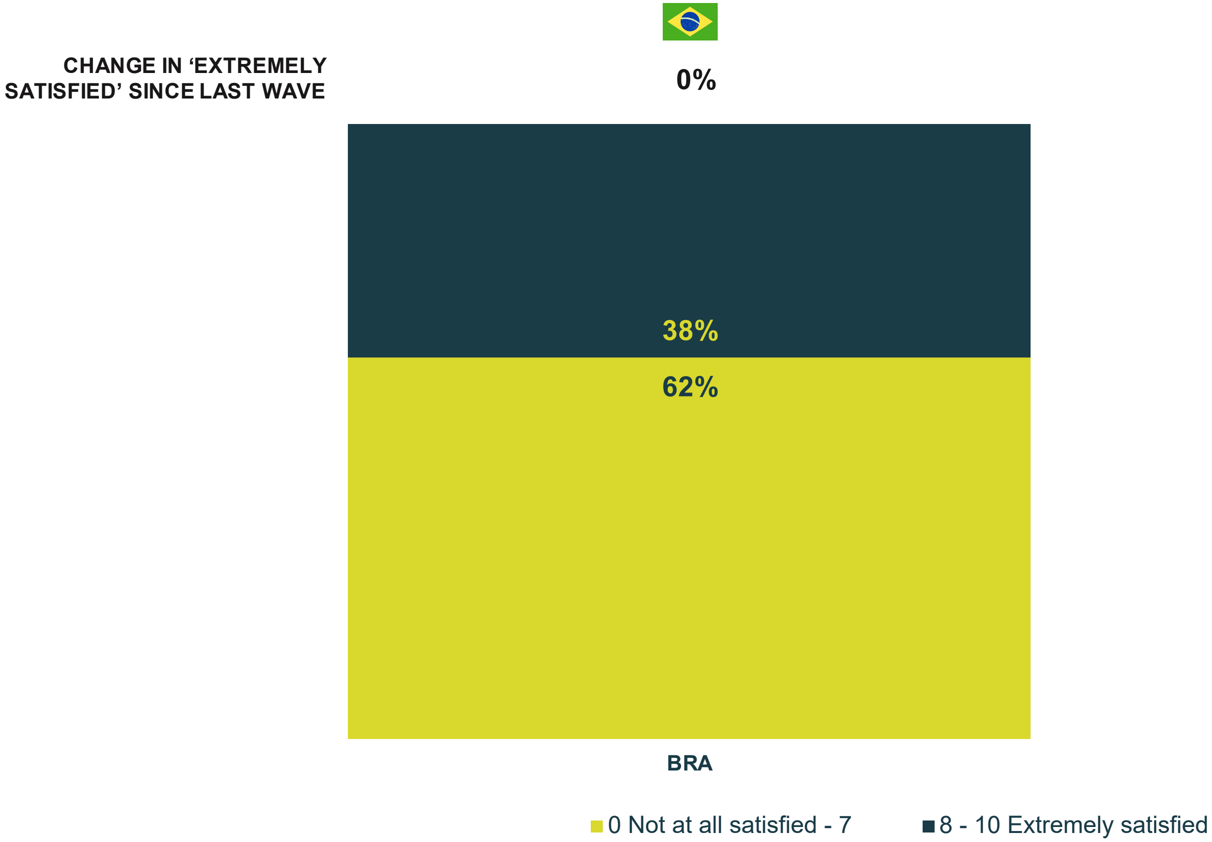
*Some numbers may not total 100% based on rounding

Consumers reactions to the Coronavirus:
Brazil



Level of satisfaction with life over the past 2 weeks

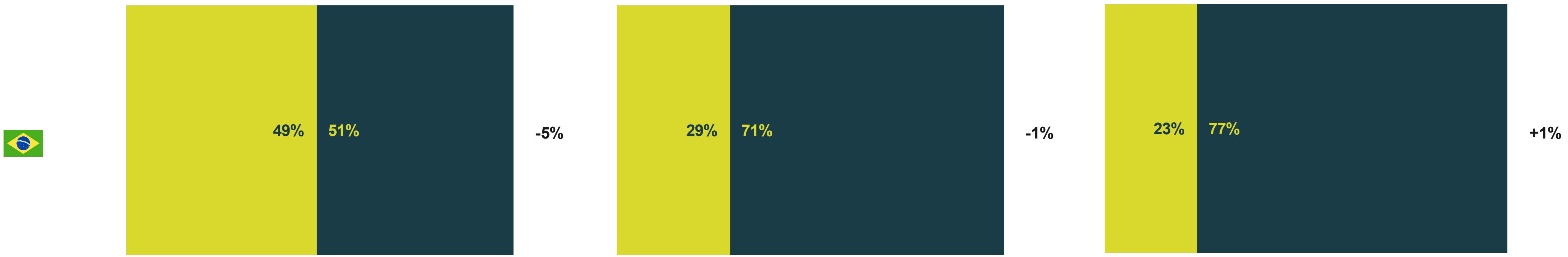
Overall satisfaction has stayed consistent in Brazil, with almost two in five (38%) rating themselves as extremely satisfied.



Level of concern with different aspects because of the Coronavirus

Getting essential supplies causes relatively little concern for Brazilians, down 5% in the past two weeks.

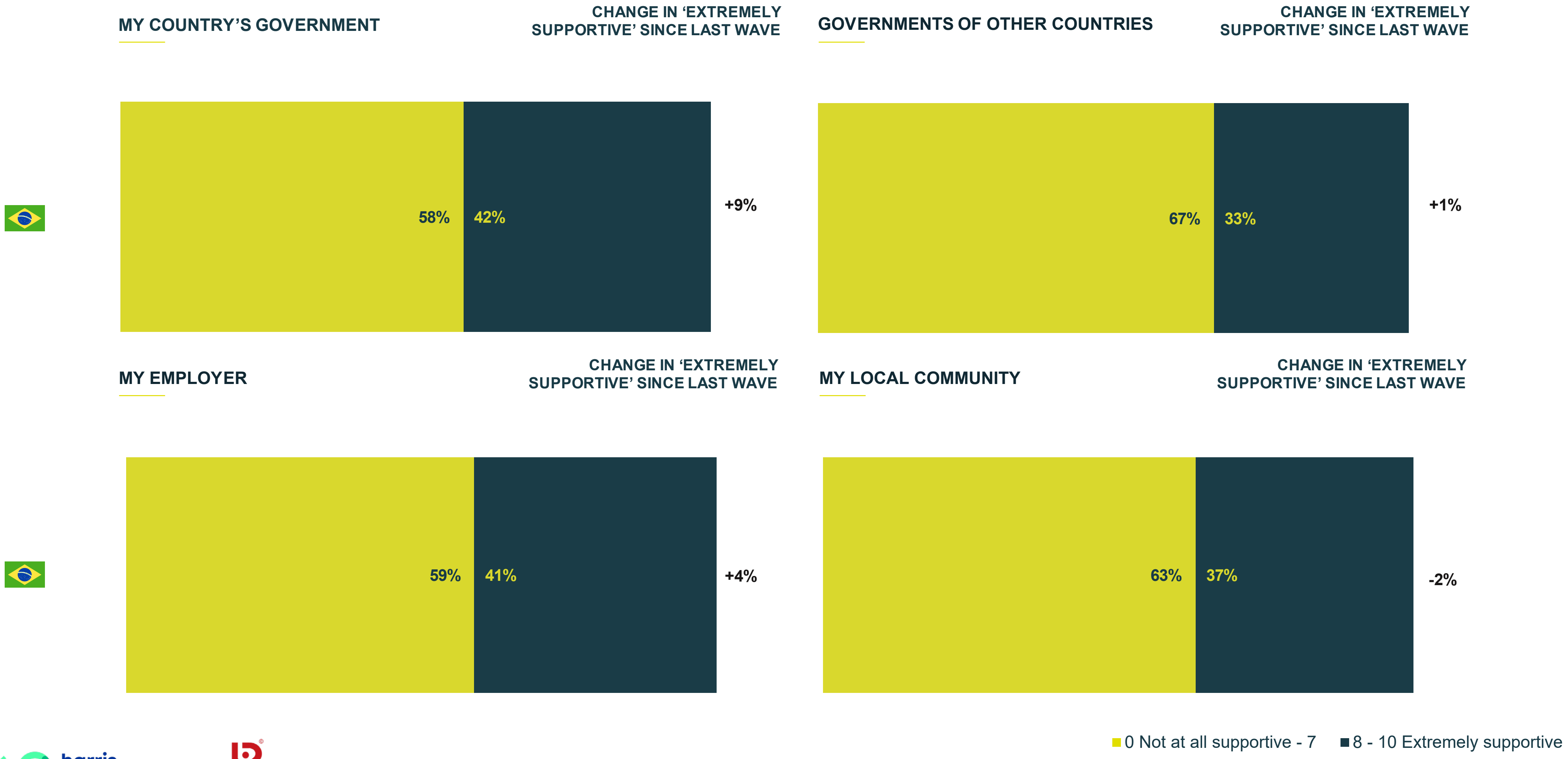
GETTING ESSENTIAL SUPPLIES	CHANGE IN 'EXTREMELY CONCERNED' SINCE LAST WAVE	GETTING ILL OR CARING FOR ILL DEPENDANT	CHANGE IN 'EXTREMELY CONCERNED' SINCE LAST WAVE	THE EFFECTS ON WIDER SOCIETY	CHANGE IN 'EXTREMELY CONCERNED' SINCE LAST WAVE



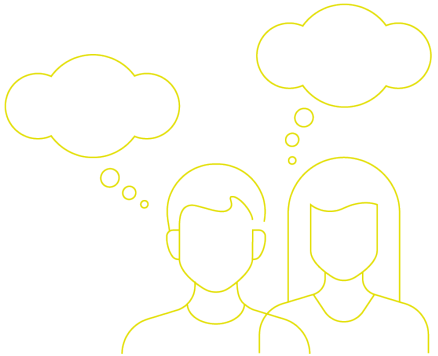
0 Not at all concerned - 7 8 - 10 Extremely concerned

Level of support given in response to the Coronavirus outbreak

There has been a notable improvement in support felt from the Brazilian government in the past two weeks, up 9% on the previous rating.



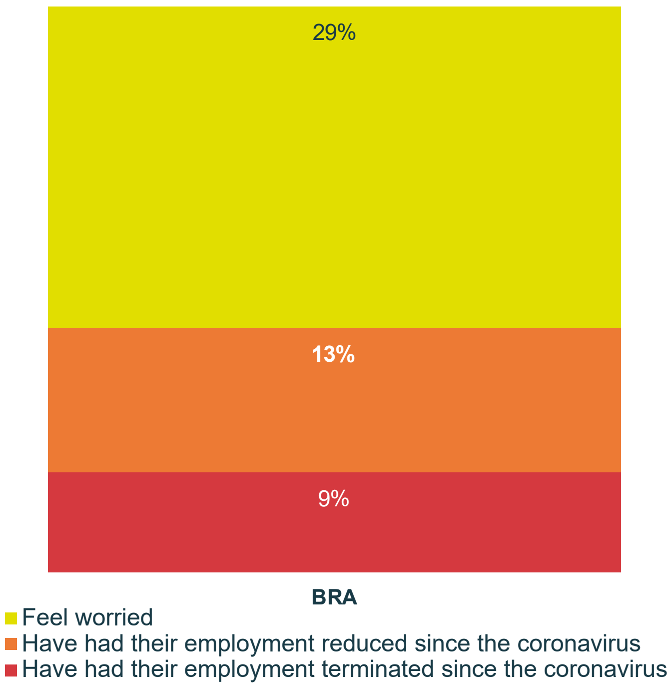
Perceived level of security in employment over the past 2 weeks



The total figure for Brazilians feeling insecure in employment (including those who've had their employment reduced or terminated) holds steady at 51%.

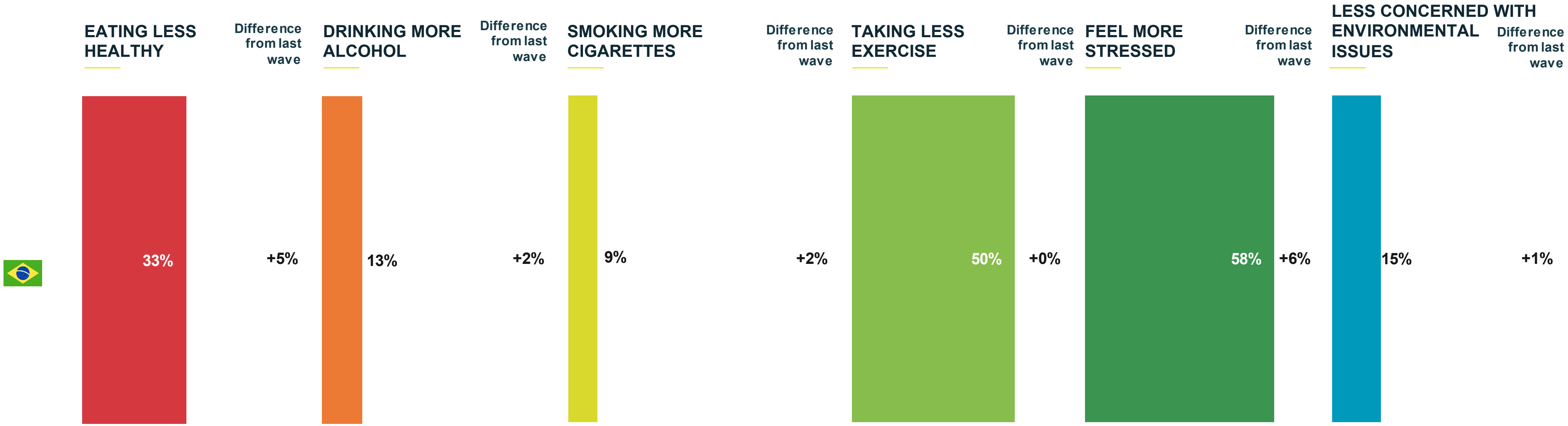
Difference in % feeling worried, having had employment reduced or terminated

-1%



Coronavirus restrictions knock-on effects

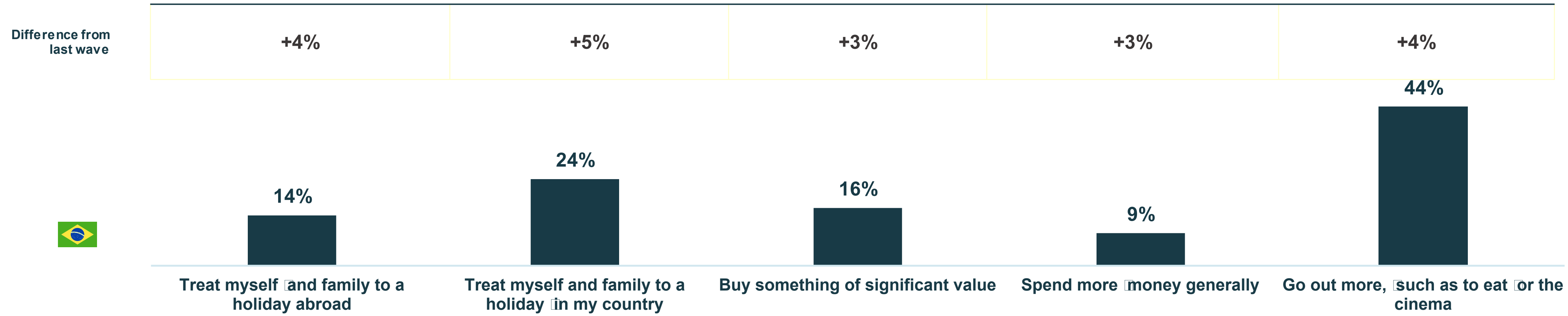
The biggest knock-on effects in Brazil are reduced exercise and increased stress.

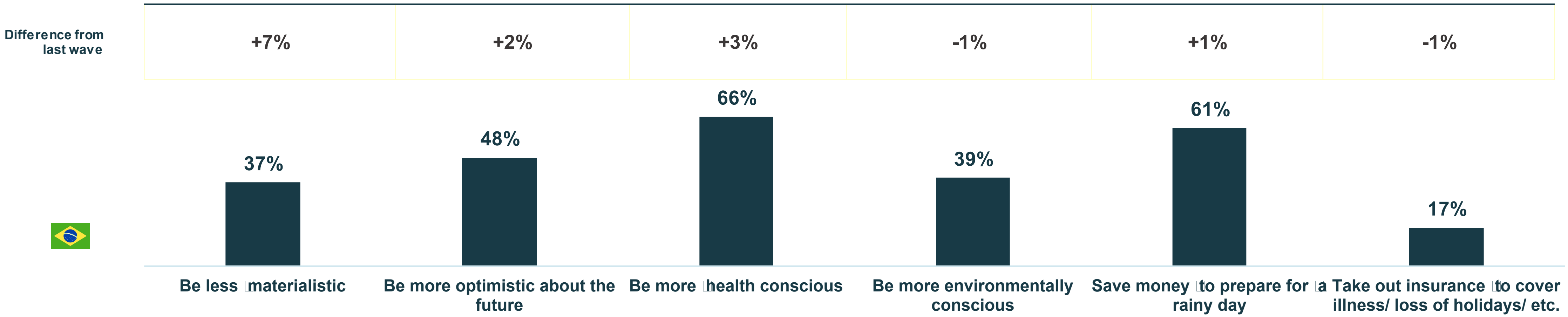


*Note – charts are not in proportion to each other by habit

Activities likely to undertake once the Coronavirus crisis is over

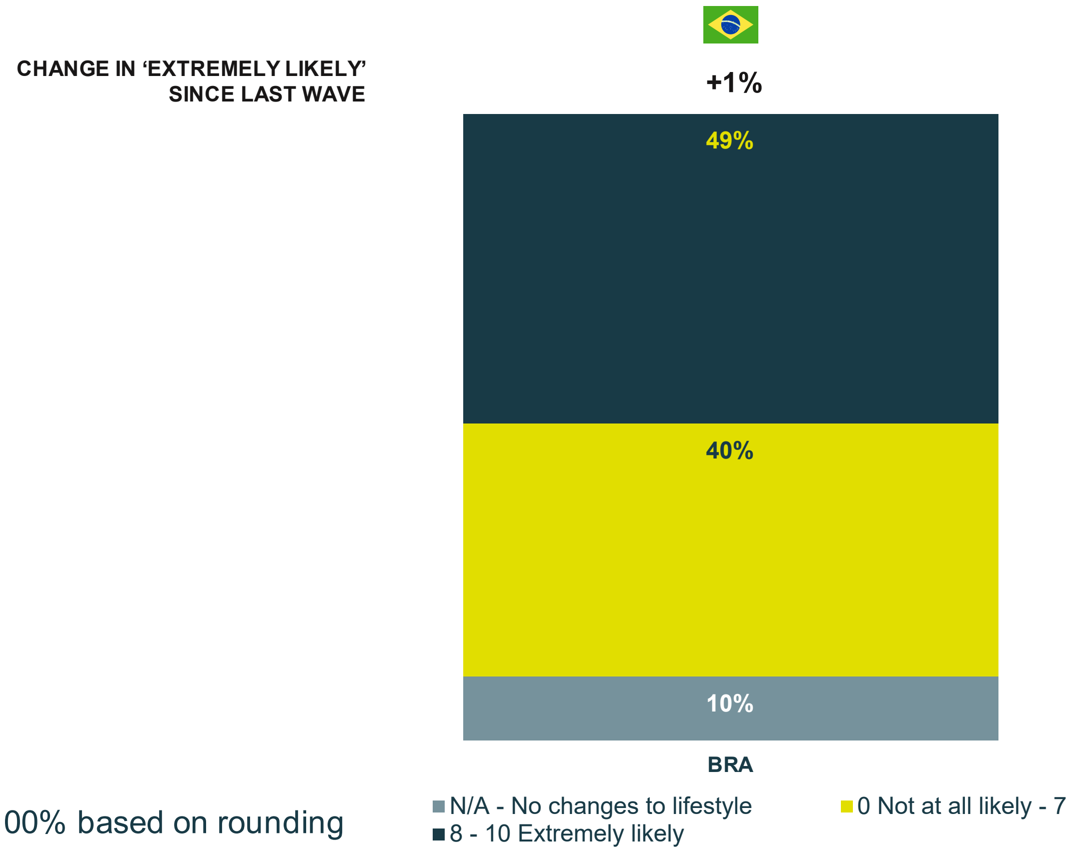
There are increases across each of the intentions to splurge post-crisis, with the biggest increase in the intention to take a domestic holiday. The biggest anticipated attitude changes are becoming more health conscious and saving money for future crises.





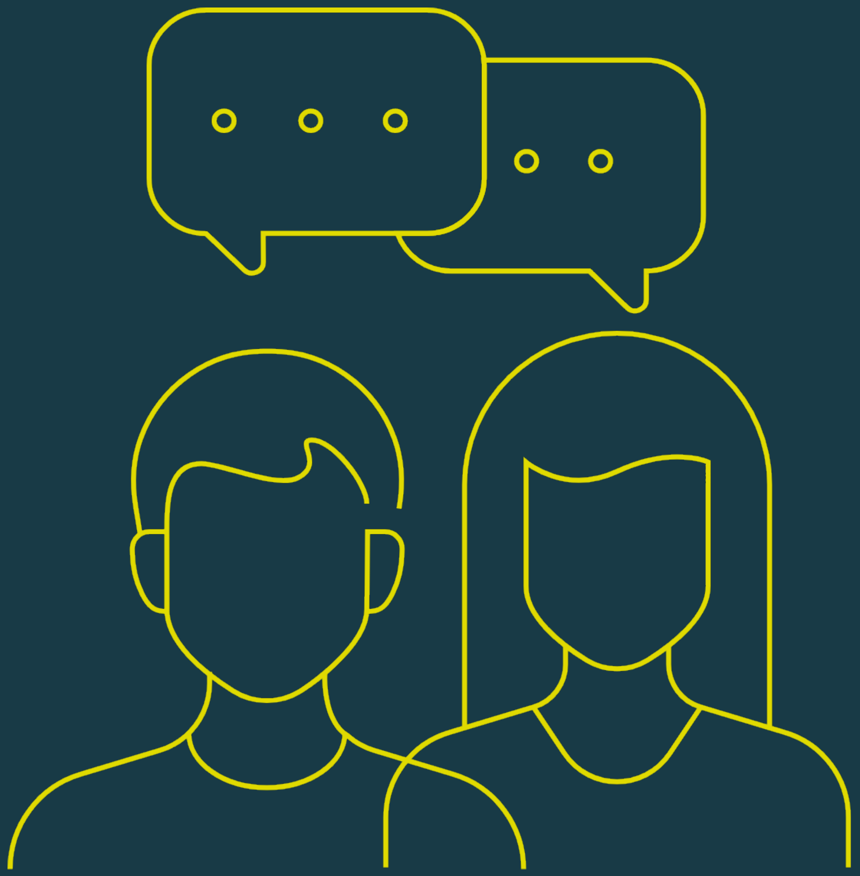
Considering changes you have made to your behaviour since the beginning of coronavirus outbreak, how likely are you to make these part of your lifestyle in the future?

Nearly half of Brazilians rate themselves as extremely likely to incorporate their temporary behavior changes into their lives going forwards.



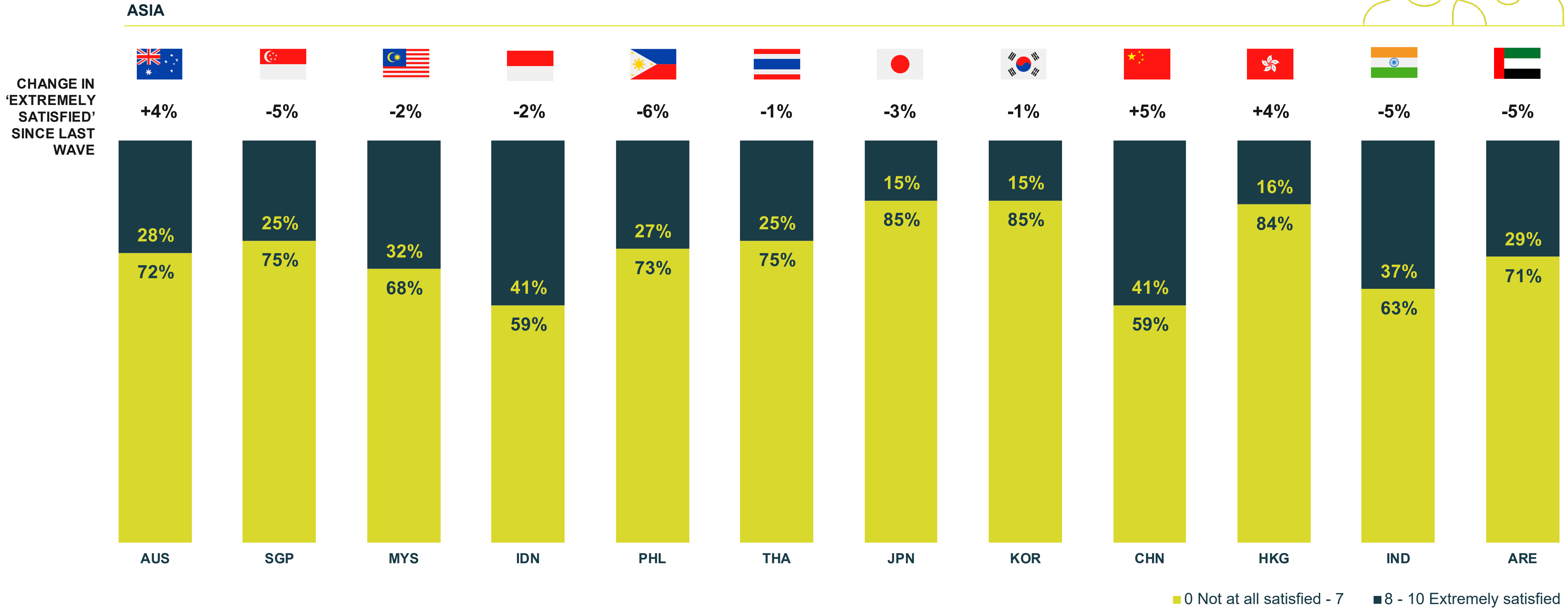
*Some numbers may not total 100% based on rounding

Consumers reactions to the Coronavirus: Asia



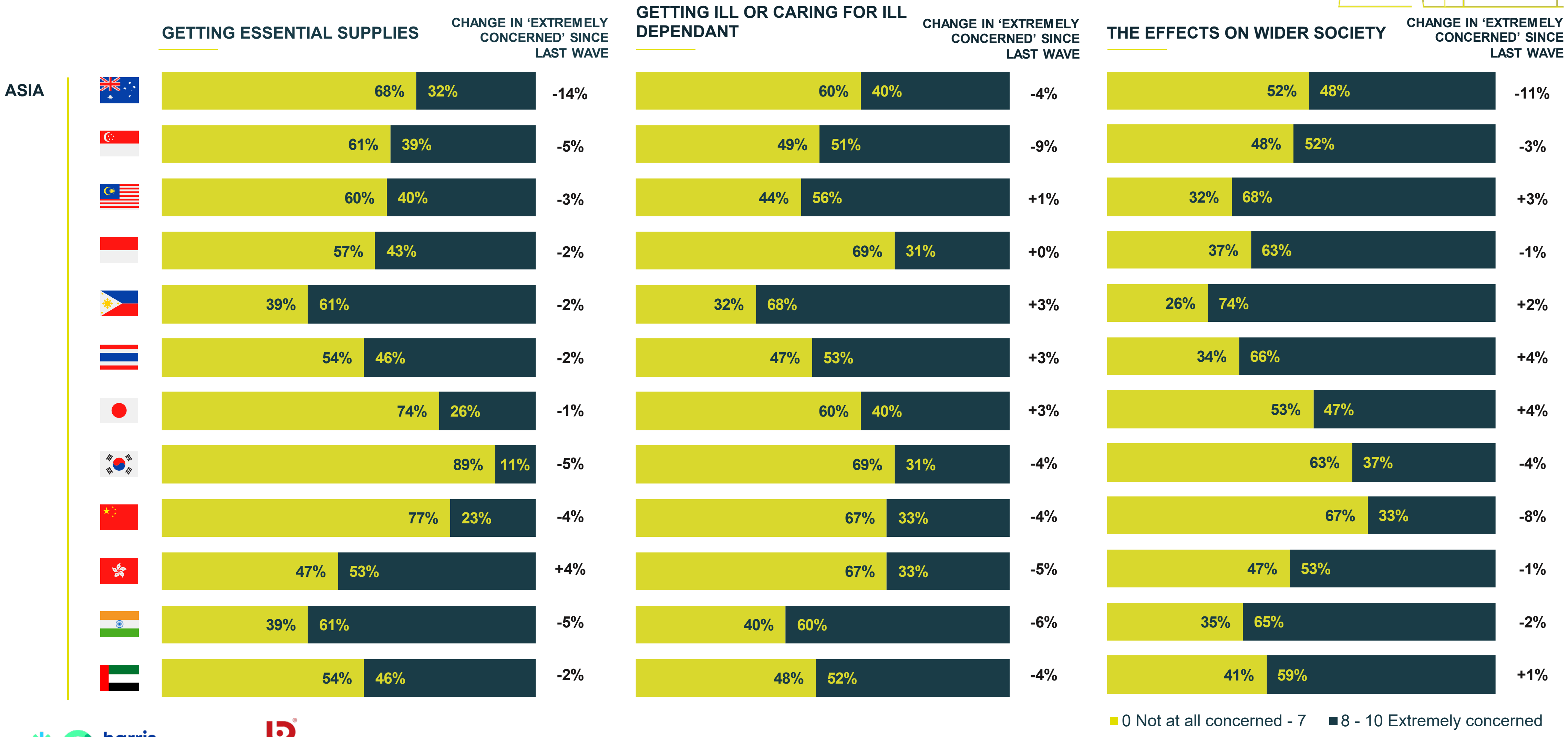
Level of satisfaction with life over the past 2 weeks

Satisfaction is highest in Indonesia, China and India, but China is the main market where satisfaction is on the increase.



Level of concern with different aspects because of the Coronavirus

Australia sees big declines in concerns around getting the essentials and the effects on wider society, while respondents in Singapore have become much less concerned with personally getting ill or caring for those around them. The highest levels of concern overall are seen in the Philippines and India.



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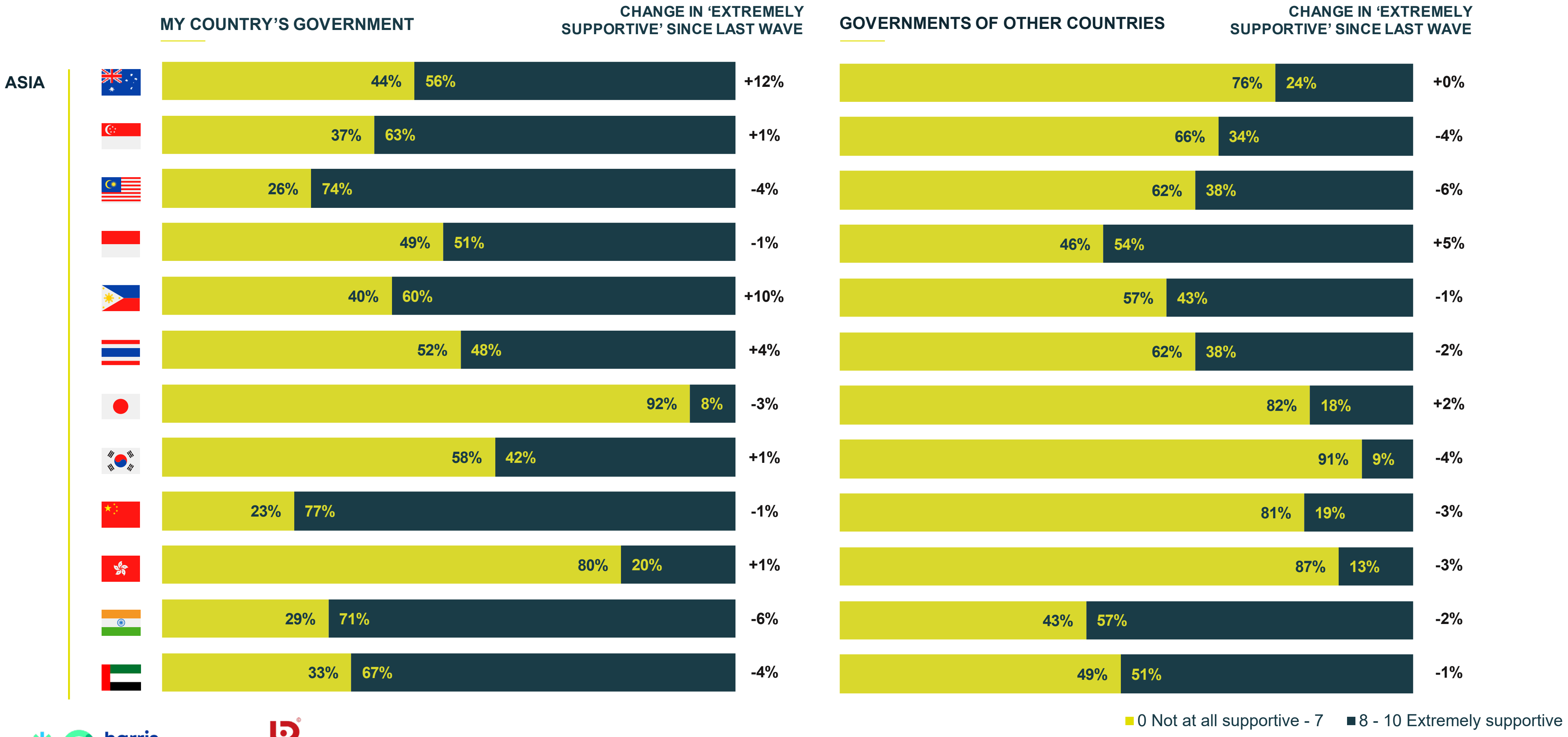
Level of support given in response to the Coronavirus outbreak

Government support was rated highly in all markets except Japan and Hong Kong.



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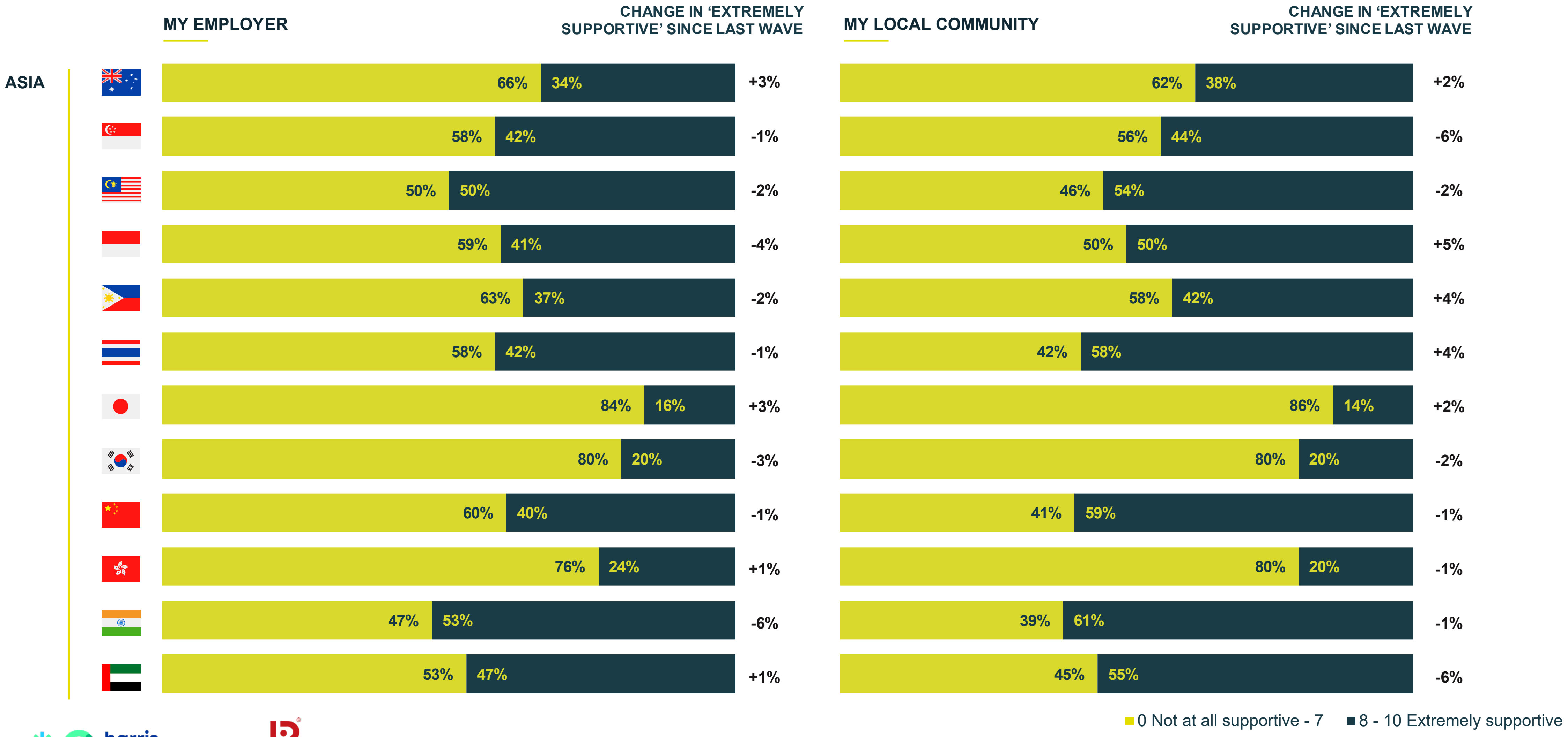
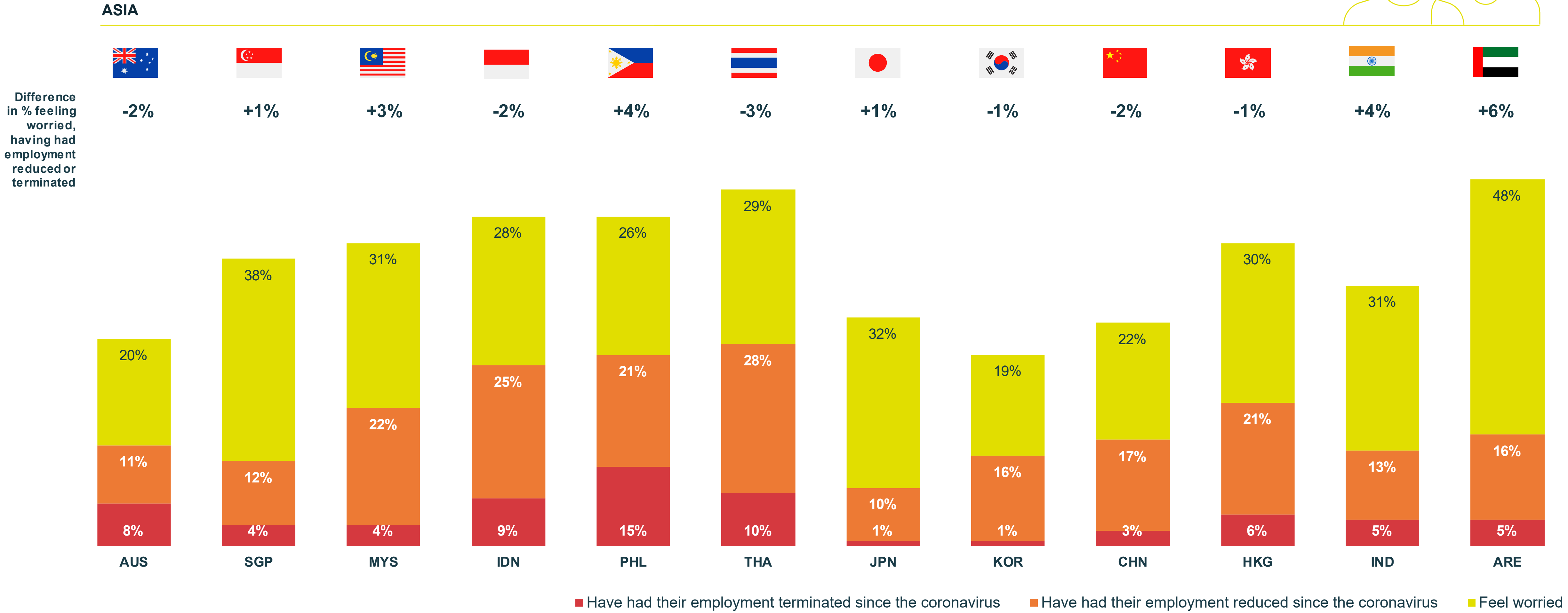
Level of support given in response to the Coronavirus outbreak

There have been drops in the support felt from employers in India and from the local community in Singapore and UAE.



Perceived level of security in employment over the past 2 weeks

The proportion of people feeling insecure or having already had their employment affected by coronavirus is up in UAE, India and the Philippines.



Coronavirus restrictions knock-on effects

The Philippines has seen a big lift in unhealthy eating, and Singapore in taking less exercise due to coronavirus restrictions.

	EATING LESS HEALTHY	Difference from last wave	DRINKING MORE ALCOHOL	Difference from last wave	SMOKING MORE CIGARETTES	Difference from last wave	TAKING LESS EXERCISE	Difference from last wave	FEEL MORE STRESSED	Difference from last wave	LESS CONCERNED WITH ENVIRONMENTAL ISSUES	Difference from last wave
ASIA	22%	+3%	16%	+5%	9%	+0%	34%	+1%	44%	-7%	13%	+2%
	21%	+3%	16%	+4%	7%	+0%	37%	+8%	52%	+3%	18%	+2%
	19%	-3%	3%	+2%	10%	+3%	47%	-4%	40%	-4%	10%	-1%
	13%	+2%	1%	-1%	11%	+2%	30%	+4%	37%	+2%	10%	-1%
	41%	+8%	3%	+0%	6%	+0%	41%	+6%	56%	+3%	12%	-1%
	14%	+0%	6%	-1%	9%	+3%	31%	+3%	68%	+2%	25%	+3%
	13%	+3%	10%	+3%	8%	+3%	42%	+6%	48%	+2%	7%	+0%
	15%	+1%	10%	-2%	10%	+2%	40%	+3%	54%	+0%	7%	+0%
	12%	+2%	8%	+0%	6%	-1%	44%	-2%	39%	-2%	8%	-3%
	20%	+5%	5%	+0%	4%	+1%	40%	+8%	50%	-2%	17%	+1%
	27%	+0%	10%	+0%	11%	+0%	32%	+1%	47%	-5%	24%	-1%
	27%	+5%	7%	+1%	10%	-1%	42%	+2%	54%	+0%	15%	-3%

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

Activities likely to undertake once the Coronavirus crisis is over

The biggest desire to splurge after the crisis is over are seen in Hong Kong, Korea and India.

	Treat myself and family to a holiday abroad	Difference from last wave	Treat myself and family to a holiday in my country	Difference from last wave	Buy something of significant value	Difference from last wave	Spend more money generally	Difference from last wave	Go out more, such as to eat or the cinema	Difference from last wave
ASIA	22%	+3%	31%	+7%	11%	+0%	15%	-1%	35%	+5%
	34%	-1%	23%	-1%	23%	+3%	19%	+1%	37%	+4%
	10%	+2%	23%	+2%	28%	+8%	8%	-1%	11%	-3%
	10%	-1%	19%	+0%	20%	+2%	13%	+2%	15%	+2%
	14%	+0%	29%	+4%	37%	+2%	2%	-2%	14%	-2%
	18%	+3%	33%	+0%	22%	+3%	13%	+2%	30%	+3%
	12%	+3%	24%	+3%	6%	+1%	14%	+2%	34%	+5%
	28%	+1%	45%	+6%	4%	+2%	10%	+1%	42%	+4%
	15%	+3%	28%	-1%	6%	+0%	23%	+2%	20%	+3%
	35%	+1%	17%	+0%	5%	+2%	23%	-3%	27%	+5%
	21%	+0%	32%	+0%	38%	+8%	24%	-1%	27%	+1%
	31%	+4%	35%	+5%	22%	-2%	16%	+3%	26%	+3%

Lowest scoring country for each measure

Highest scoring country for each measure

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Activities likely to undertake once the Coronavirus crisis is over

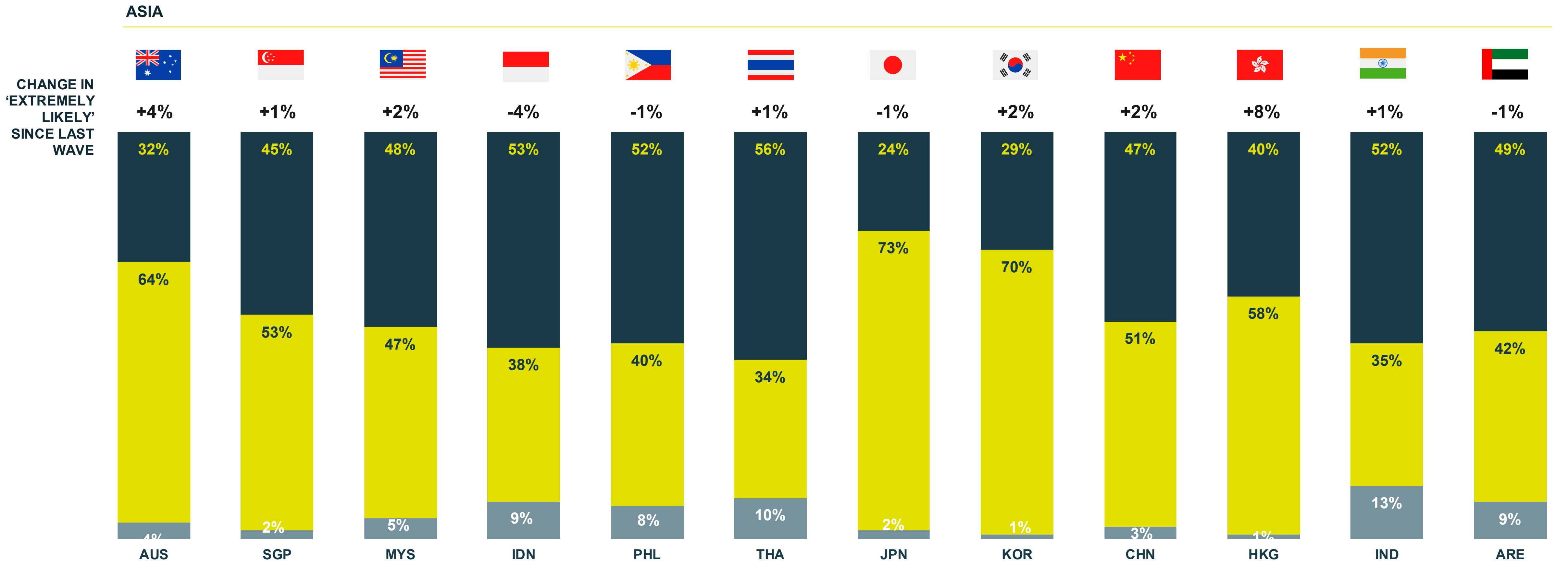
The Philippines is by far the most intent on changing attitudes to be more prepared for a crisis post-coronavirus.

	Be less materialistic	Difference from last wave	Be more optimistic about the future	Difference from last wave	Be more health conscious	Difference from last wave	Be more environmentally conscious	Difference from last wave	Save money to prepare for a rainy day	Difference from last wave	Take out insurance to cover illness/ loss of holidays/ etc.	Difference from last wave
ASIA	22%	+4%	36%	+2%	39%	+0%	23%	+2%	32%	-2%	6%	-1%
	22%	+3%	37%	-5%	58%	+0%	37%	-4%	51%	+6%	21%	+0%
	27%	+4%	52%	+2%	78%	+2%	55%	+3%	80%	+12%	32%	+5%
	33%	-5%	45%	-3%	76%	+0%	57%	-6%	56%	+3%	16%	-2%
	52%	+10%	73%	+7%	88%	+7%	76%	+14%	83%	+10%	43%	+4%
	31%	+5%	39%	+3%	76%	+2%	53%	+3%	66%	+3%	36%	+1%
	10%	+0%	13%	-2%	43%	-3%	18%	-4%	22%	-1%	6%	+1%
	13%	+2%	18%	+2%	59%	+2%	31%	+0%	36%	+3%	10%	+0%
	16%	+1%	32%	+0%	79%	-1%	62%	+3%	45%	+3%	40%	+4%
	32%	+0%	12%	+0%	66%	+0%	36%	+1%	50%	+2%	15%	+6%
	26%	+5%	50%	-2%	67%	+3%	56%	+0%	40%	+5%	31%	+1%
	26%	+1%	47%	-5%	62%	+1%	46%	+0%	48%	+5%	19%	-1%

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?

The majority of people in Indonesia, the Philippines, Thailand and India intend to incorporate the changes they've made into their permanent lifestyles.



*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

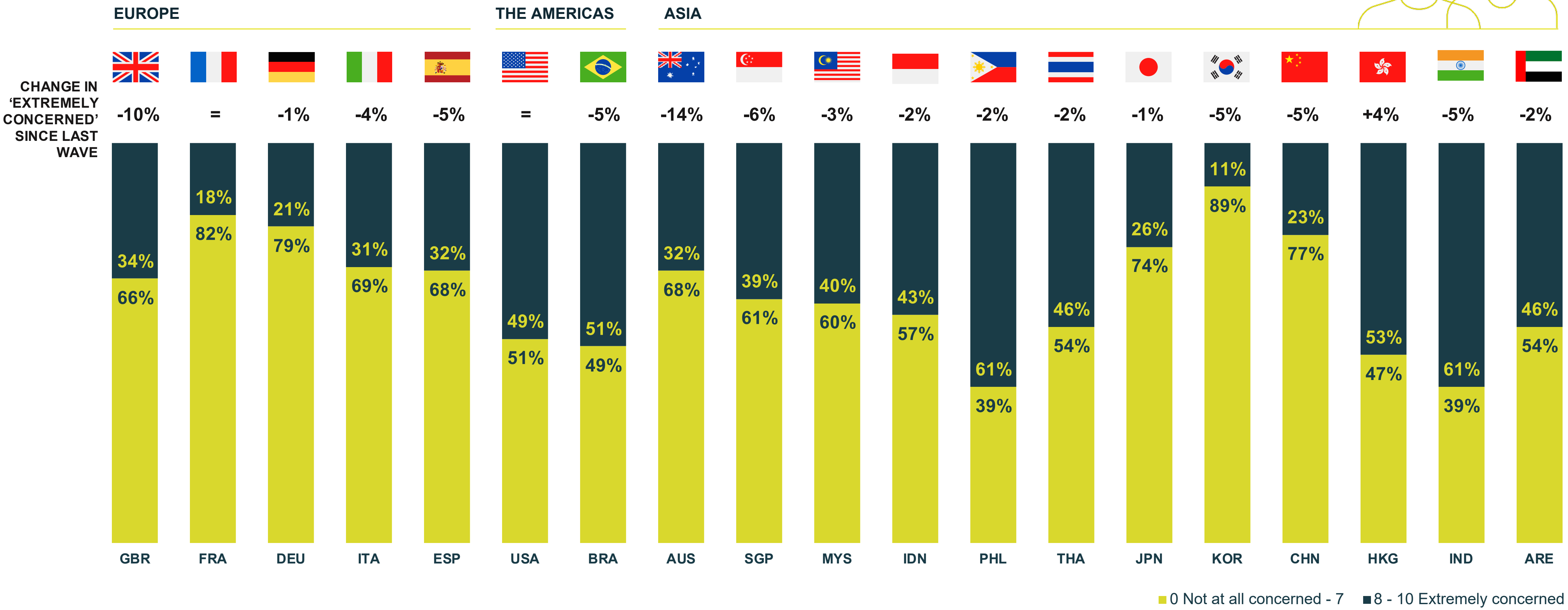
The Impact of COVID-19 and the CPG / FMCG Industry

Wave 2 Results
Released 23rd April

toluna harris interactive KURUNDATA

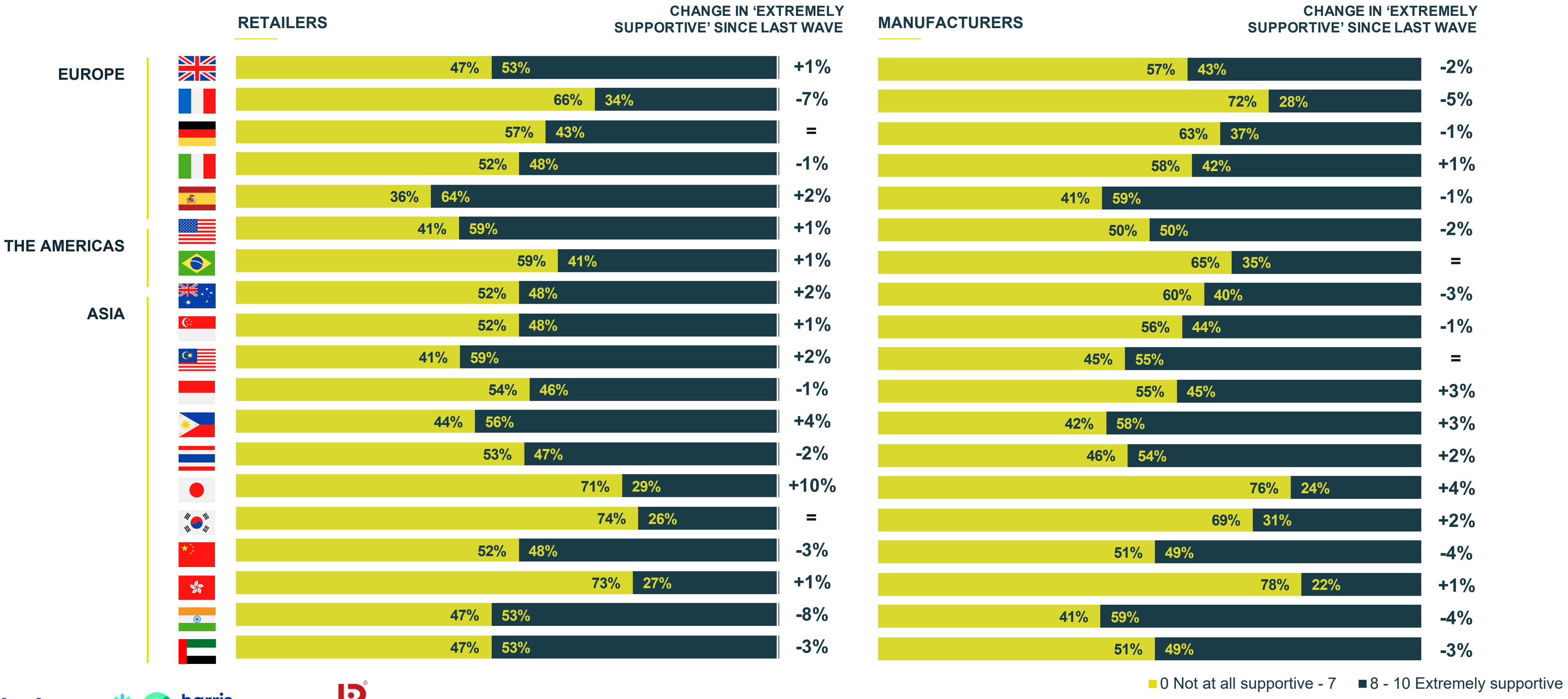
Level of concern with essential supplies (including groceries, toiletries and medication) because of the Coronavirus

Concerns seem to be alleviating across Europe, with a notable drop in concern about getting essential supplies in the UK and Spain. Australia, too, sees a notable decline in concern while Hong Kong uniquely sees an uptick.



Level of support given in response to the Coronavirus outbreak

Despite having the highest concerns about accessing essential supplies, those in the UK and Spain are the most likely in Europe to highly rate the support of retailers. Hong Kong continues to rate retailer support low



Past two weeks purchase of fmcg items

In the UK people continue to shun in-store shopping whilst online grocery shopping sees the highest levels in Europe. China is seeing increases across all three channels of restaurant eating – takeaway, drive-through and in-restaurant eating and drinking.

	EUROPE					THE AMERICAS		ASIA											
In-store grocery shopping	69%	77%	87%	83%	77%	69%	73%	79%	65%	85%	74%	85%	48%	81%	69%	69%	85%	60%	71%
Cleaning products	60%	56%	60%	81%	78%	55%	84%	55%	58%	69%	70%	82%	74%	37%	30%	75%	72%	73%	73%
Handwash or sanitiser	45%	36%	54%	72%	67%	45%	80%	45%	62%	75%	73%	80%	78%	45%	48%	76%	68%	80%	79%
Frozen food	62%	59%	67%	65%	59%	65%	41%	63%	60%	67%	38%	72%	54%	58%	61%	53%	68%	23%	52%
Long-life or canned goods	57%	60%	60%	74%	56%	53%	62%	56%	55%	69%	50%	87%	66%	39%	35%	44%	53%	27%	47%
Toilet rolls	56%	56%	60%	74%	59%	53%	66%	53%	47%	26%	31%	54%	49%	54%	35%	55%	61%	32%	44%
Pasta	44%	65%	52%	84%	70%	49%	66%	46%	36%	26%	21%	35%	11%	34%	11%	39%	31%	28%	32%
Online grocery shopping	32%	26%	13%	28%	23%	36%	35%	20%	46%	44%	45%	27%	56%	29%	63%	73%	41%	46%	50%
Home delivery of food or drink froma restaurant, bar or café	17%	12%	16%	22%	16%	27%	45%	21%	40%	38%	35%	27%	39%	11%	37%	34%	34%	28%	49%
Curbside or Drive Through pick up of food or drink from a restaurant, bar or café	7%	10%	15%	8%	4%	36%	22%	21%	14%	26%	19%	17%	34%	17%	14%	22%	50%	10%	18%
Eating or drinking at a restaurant, bar or café	6%	5%	8%	6%	4%	15%	8%	7%	23%	6%	9%	5%	10%	20%	32%	16%	31%	13%	12%

At least 5% lower than last wave

At least 5% higher than last wave

Items purchased more of in the last two weeks

Purchase of handwash and sanitizer continues to rise in several markets, while demand for toilet roll seems to be subsiding in some of the Asian markets. Online shopping and home delivery see increases in multiple markets.

	EUROPE					THE AMERICAS		ASIA											
	UK	France	Germany	Italy	Spain	USA	Brazil	Australia	Singapore	Malaysia	Indonesia	Philippines	Thailand	Japan	South Korea	China	Hong Kong	India	UAE
Handwash or sanitiser	28%	26%	26%	60%	55%	39%	66%	30%	55%	53%	66%	55%	73%	28%	41%	64%	50%	77%	73%
Cleaning products	24%	18%	18%	48%	46%	40%	57%	26%	48%	43%	62%	52%	65%	15%	16%	56%	52%	65%	62%
Long-life or canned goods	29%	26%	26%	49%	41%	37%	35%	30%	49%	50%	48%	63%	73%	25%	24%	36%	44%	34%	41%
In-store grocery shopping	26%	23%	21%	43%	31%	31%	35%	28%	45%	48%	52%	56%	29%	21%	16%	31%	51%	54%	43%
Frozen food	24%	22%	21%	38%	35%	36%	25%	27%	51%	50%	35%	50%	52%	23%	29%	37%	52%	24%	39%
Online grocery shopping	22%	19%	11%	25%	20%	33%	31%	18%	46%	30%	42%	22%	62%	17%	44%	55%	36%	44%	45%
Toilet rolls	20%	16%	16%	33%	25%	35%	34%	21%	36%	14%	35%	36%	41%	15%	14%	27%	34%	34%	36%
Home delivery of food or drink from a restaurant, bar or café	12%	9%	9%	16%	11%	25%	35%	17%	38%	24%	31%	18%	43%	9%	25%	25%	32%	21%	31%
Pasta	19%	23%	18%	45%	34%	27%	32%	20%	25%	19%	17%	17%	15%	14%	6%	28%	19%	24%	27%
Curbside or Drive Through pick up of food or drink from a restaurant, bar or café	8%	7%	7%	7%	5%	29%	12%	13%	19%	12%	18%	11%	32%	10%	12%	16%	44%	16%	16%
Eating or drinking at a restaurant, bar or café	6%	6%	5%	5%	4%	15%	6%	5%	12%	6%	8%	5%	7%	2%	6%	11%	7%	14%	13%

At least 5% lower than last wave

At least 5% higher than last wave

Items purchased less in the last two weeks

Declines continue in several markets for use of restaurant services – including for drive-through and take-away food and drink.

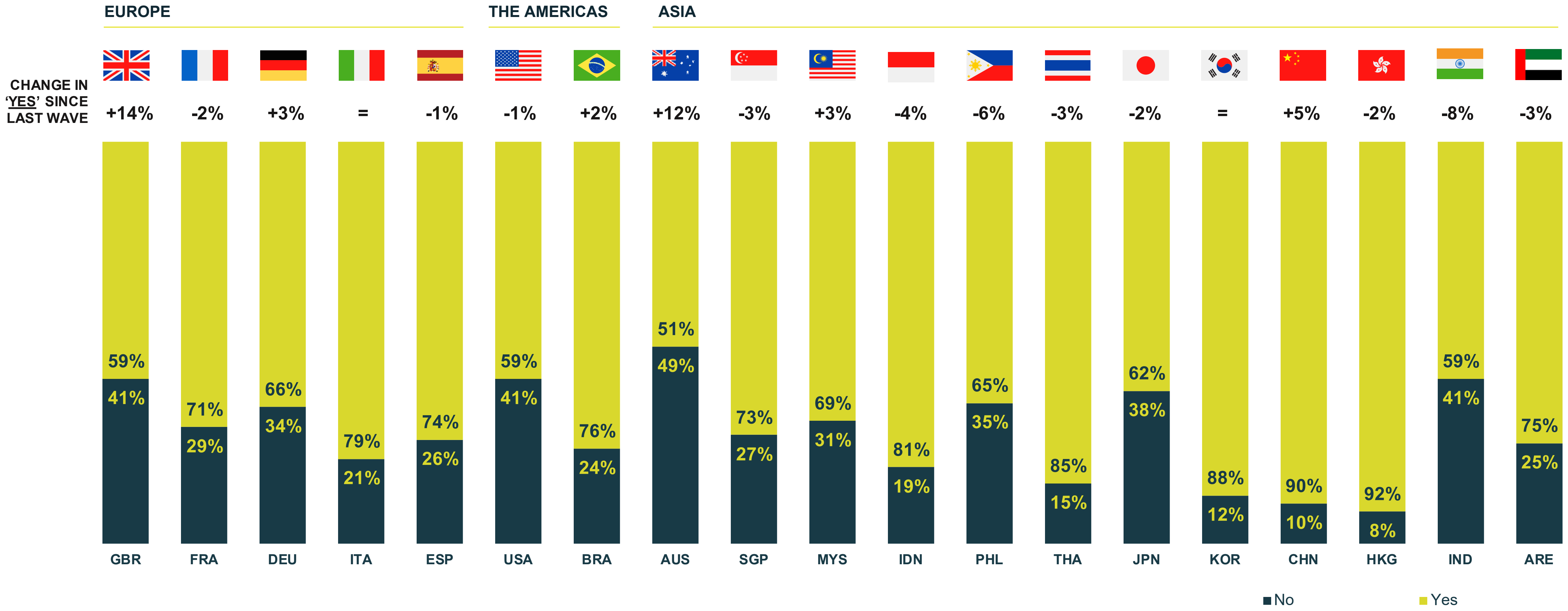
	EUROPE					THE AMERICAS		ASIA											
Eating or drinking at a restaurant, bar or café	65%	67%	46%	79%	82%	58%	76%	67%	67%	82%	77%	85%	82%	52%	57%	67%	67%	73%	71%
Curbside or Drive Through pick up of food or drink from a restaurant, bar or café	48%	57%	34%	69%	71%	30%	60%	39%	42%	70%	60%	71%	37%	23%	42%	52%	25%	66%	56%
Home delivery of food or drink from a restaurant, bar or café	40%	51%	32%	57%	61%	28%	32%	36%	26%	51%	45%	62%	25%	26%	29%	42%	32%	59%	42%
Online grocery shopping	26%	32%	21%	34%	42%	20%	33%	29%	18%	42%	27%	54%	14%	12%	9%	10%	24%	32%	25%
Pasta	19%	10%	8%	4%	5%	12%	9%	20%	21%	56%	45%	44%	47%	11%	43%	18%	24%	42%	32%
In-store grocery shopping	20%	13%	5%	12%	18%	27%	19%	17%	17%	15%	18%	19%	28%	10%	28%	33%	7%	19%	20%
Frozen food	9%	13%	6%	11%	10%	10%	25%	9%	10%	14%	25%	22%	13%	6%	13%	16%	6%	46%	20%
Toilet rolls	12%	10%	8%	4%	6%	16%	5%	23%	13%	43%	20%	29%	7%	11%	15%	3%	11%	30%	13%
Long-life or canned goods	10%	9%	5%	5%	8%	9%	13%	10%	10%	17%	19%	13%	3%	7%	17%	14%	13%	35%	20%
Handwash or sanitiser	13%	23%	5%	6%	5%	12%	4%	19%	9%	10%	11%	27%	4%	9%	13%	6%	12%	5%	6%
Cleaning products	6%	10%	4%	4%	3%	10%	3%	12%	9%	12%	7%	20%	3%	8%	19%	5%	8%	9%	4%

At least 5% lower than last wave

At least 5% higher than last wave

Has access to the usual products and services been normal over the past 2 weeks?

Access to usual products is up notably in the UK and Australia, but these two markets have some of the lowest scores where over half are now able to shop as normal. Access is declining in India and the Philippines.



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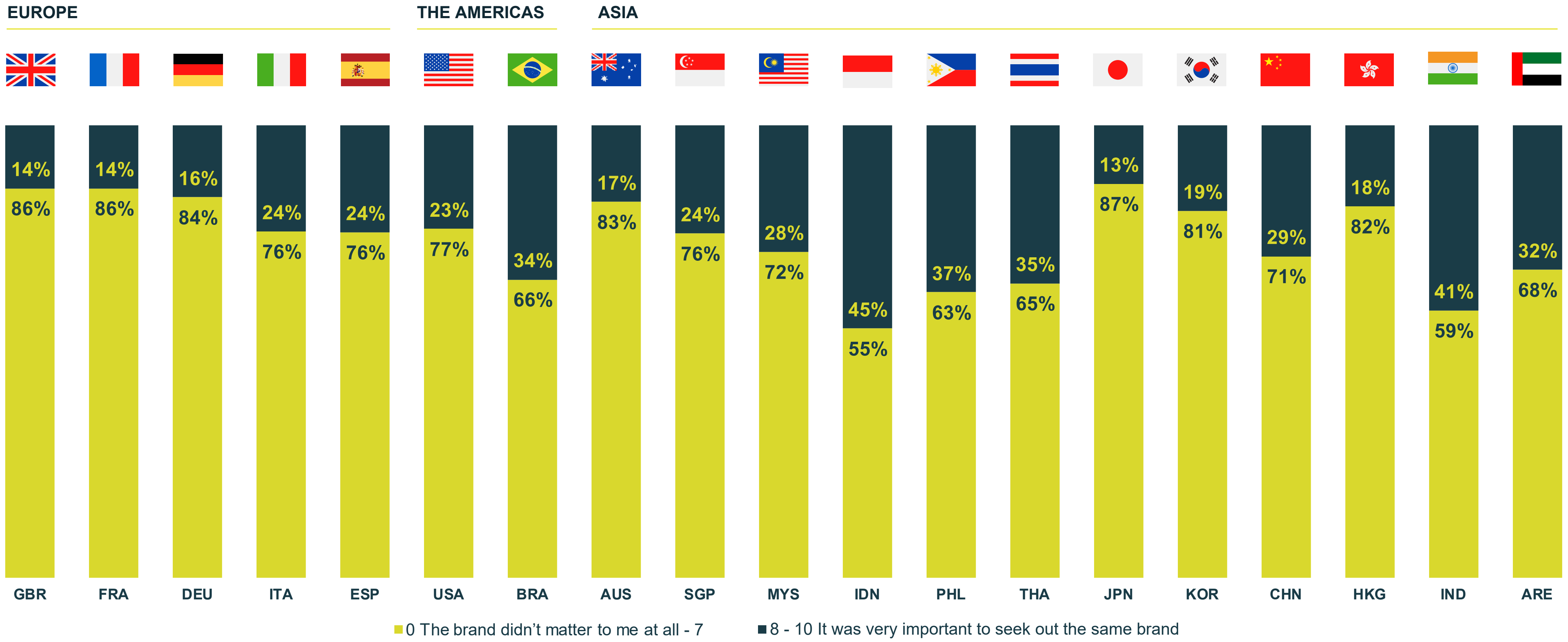
Consequences of not being able to access products or services as normal

Going without something usually bought is among the biggest consequences of not being able to access products or services in Europe, the USA and Australia and many people are paying more than usual for products. We see around a third of people globally buying new brands and products.

	EUROPE					THE AMERICAS		ASIA											
Gone without something I'd usually buy	66%	38%	40%	56%	53%	60%	42%	68%	40%	31%	17%	28%	9%	37%	25%	39%	20%	36%	30%
Paid more for something than I usually would	47%	39%	31%	56%	43%	47%	49%	52%	45%	27%	23%	48%	24%	31%	16%	40%	41%	51%	43%
Had to shop around for something in physical stores	31%	22%	11%	19%	24%	38%	25%	41%	28%	15%	34%	47%	20%	34%	8%	12%	20%	34%	27%
Tried buying from a new brand	28%	27%	38%	27%	37%	28%	38%	31%	33%	41%	28%	50%	48%	11%	10%	21%	23%	32%	25%
Tried a new product	26%	26%	15%	28%	35%	25%	37%	29%	36%	49%	39%	52%	32%	17%	5%	21%	22%	37%	30%
Shopped online for something I'd usually buy in a physical store	23%	24%	18%	31%	27%	33%	31%	21%	30%	42%	35%	30%	30%	22%	19%	43%	24%	25%	37%
Had to shop around for something online	22%	21%	20%	35%	15%	28%	33%	16%	31%	28%	32%	22%	40%	24%	36%	37%	32%	16%	35%
Shopped in a physical store for something I'd usually buy online	9%	9%	3%	7%	8%	9%	6%	6%	11%	7%	20%	18%	6%	6%	4%	11%	14%	31%	12%
Paid less for something than I usually would	6%	6%	6%	6%	4%	5%	5%	4%	8%	11%	14%	21%	27%	3%	5%	2%	3%	11%	12%
None of the above	6%	14%	21%	2%	7%	9%	7%	7%	3%	6%	11%	5%	7%	14%	30%	15%	19%	8%	6%

When you weren't able to access the products and services you would usually buy, how important was the brand in deciding how to seek an alternative?

When faced with limited access, the highest levels of brand loyalty are seen in Indonesia and India, while Japan, the UK and France show the least brand affinity when trying to replace a product they couldn't find.



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

Consumers in Hong Kong are less likely to buy a different brand in the same category, whilst increases in willingness to buy another brand is increasing in the UK, the USA, Australia, China and Singapore

	EUROPE					THE AMERICAS		ASIA											
Personal toiletries	46%	43%	39%	50%	39%	49%	50%	45%	50%	32%	49%	37%	50%	17%	25%	36%	38%	41%	44%
Household cleaning products	39%	37%	34%	41%	32%	43%	42%	37%	46%	36%	45%	33%	44%	17%	23%	31%	25%	42%	47%
Paper goods (e.g. toilet paper, kitchen roll, baby wipes)	39%	37%	34%	36%	30%	47%	42%	42%	43%	30%	39%	33%	46%	16%	29%	31%	28%	37%	39%
Canned foods	36%	36%	28%	42%	30%	43%	37%	38%	45%	40%	40%	34%	38%	15%	23%	25%	23%	35%	43%
Soft drinks	38%	38%	31%	36%	35%	41%	40%	35%	36%	27%	35%	26%	37%	19%	20%	28%	26%	41%	43%
Fruit and vegetables	30%	31%	28%	33%	30%	38%	35%	31%	36%	23%	35%	27%	31%	14%	20%	23%	15%	30%	34%
Alcoholic drinks	39%	35%	32%	36%	30%	36%	38%	37%	37%	10%	11%	20%	26%	22%	25%	28%	17%	28%	24%

At least 5% lower than last wave

At least 5% higher than last wave

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

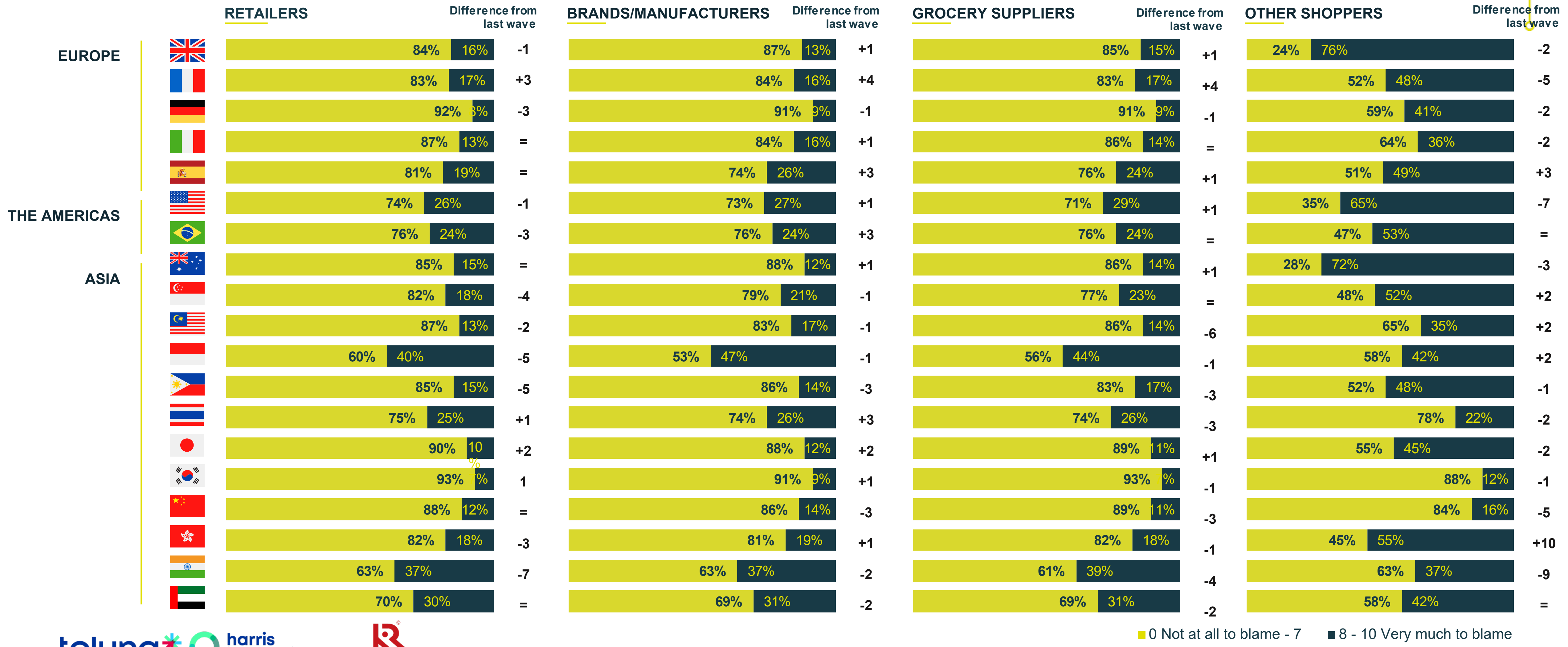
All of the European markets have become more willing to seek an alternative online retailer. The highest levels of willingness to go directly to the product manufacturer are seen in the USA and Thailand.

	VISIT AN ALTERNATIVE PHYSICAL RETAILER	Difference from last wave	VISIT AN ALTERNATIVE ONLINE RETAILER	Difference from last wave	GO DIRECTLY TO THE PRODUCT MANUFACTURER	Difference from last wave
EUROPE	69%	-8	44%	+2	15%	+2
	70%	+2	33%	+3	16%	+1
	75%	+1	45%	+1	14%	-1
	62%	-1	57%	+4	9%	-1
	77%	+1	44%	+5	9%	-3
THE AMERICAS	68%	-4	56%	+4	27%	+2
	50%	-4	65%	+6	14%	-1
ASIA	77%	-7	40%	=	15%	-1
	70%	+4	64%	+3	19%	-4
	62%	-1	73%	+9	6%	-5
	73%	+3	65%	+1	14%	-2
	82%	+1	51%	+5	7%	-5
	65%	+5	74%	-2	30%	+1
	82%	=	54%	+5	6%	=
	52%	+4	77%	-1	6%	-1
	55%	=	80%	=	13%	+1
	81%	+5	60%	-2	14%	-2
	70%	+1	62%	-5	24%	+2
	59%	-2	64%	+4	15%	-5

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

Blame regarding shortages of products since the outbreak of the coronavirus

Most markets put the blame for product shortages firmly on the shoulders of other shoppers – this is especially the case in the UK and Australia where over 70% of people blame shoppers. Suppliers, brands and retailers tend not to be much less blamed universally.



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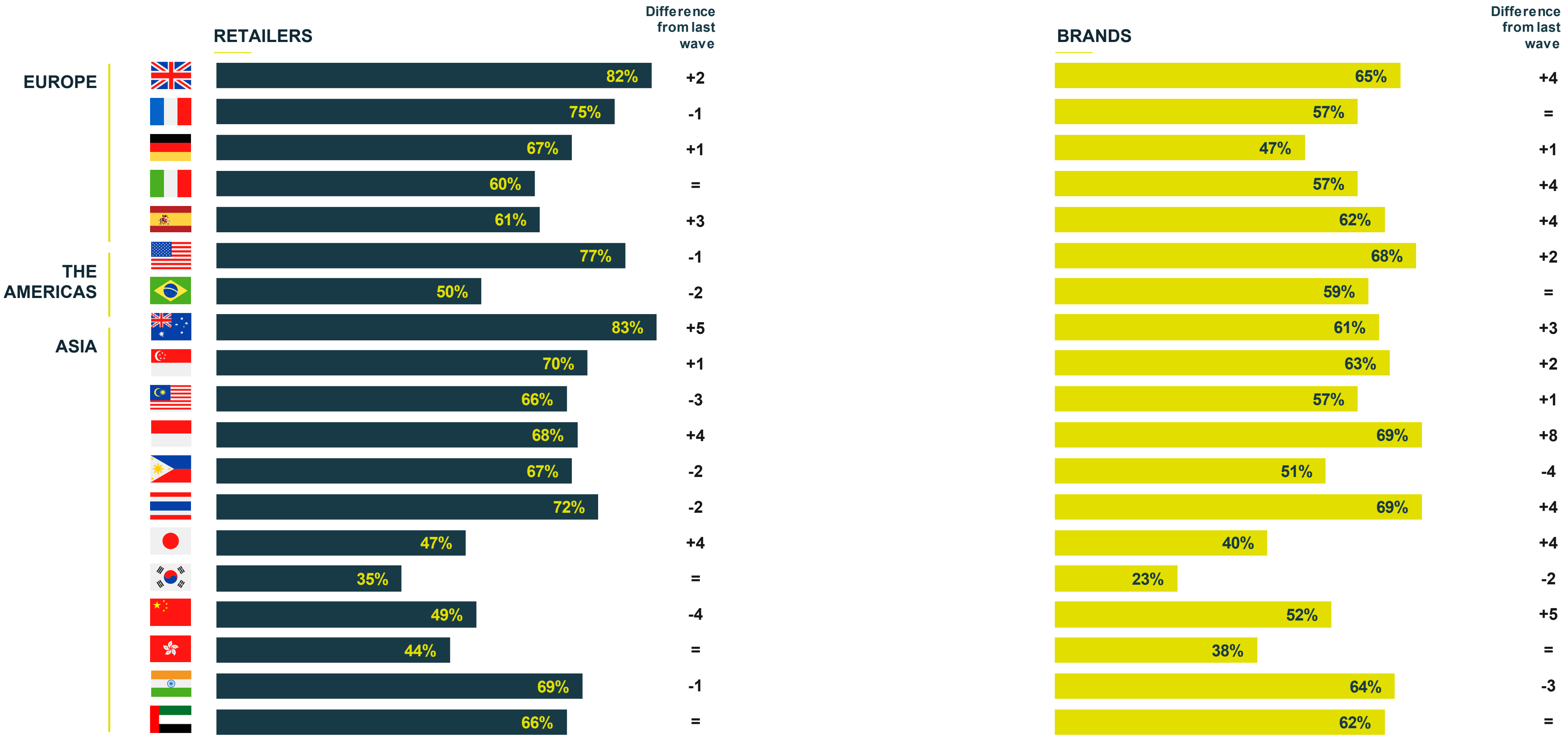
Are you getting sufficient communications about the impact of coronavirus

People generally feel sufficiently communicated with from both brands and retailers with some improvements seen almost universally

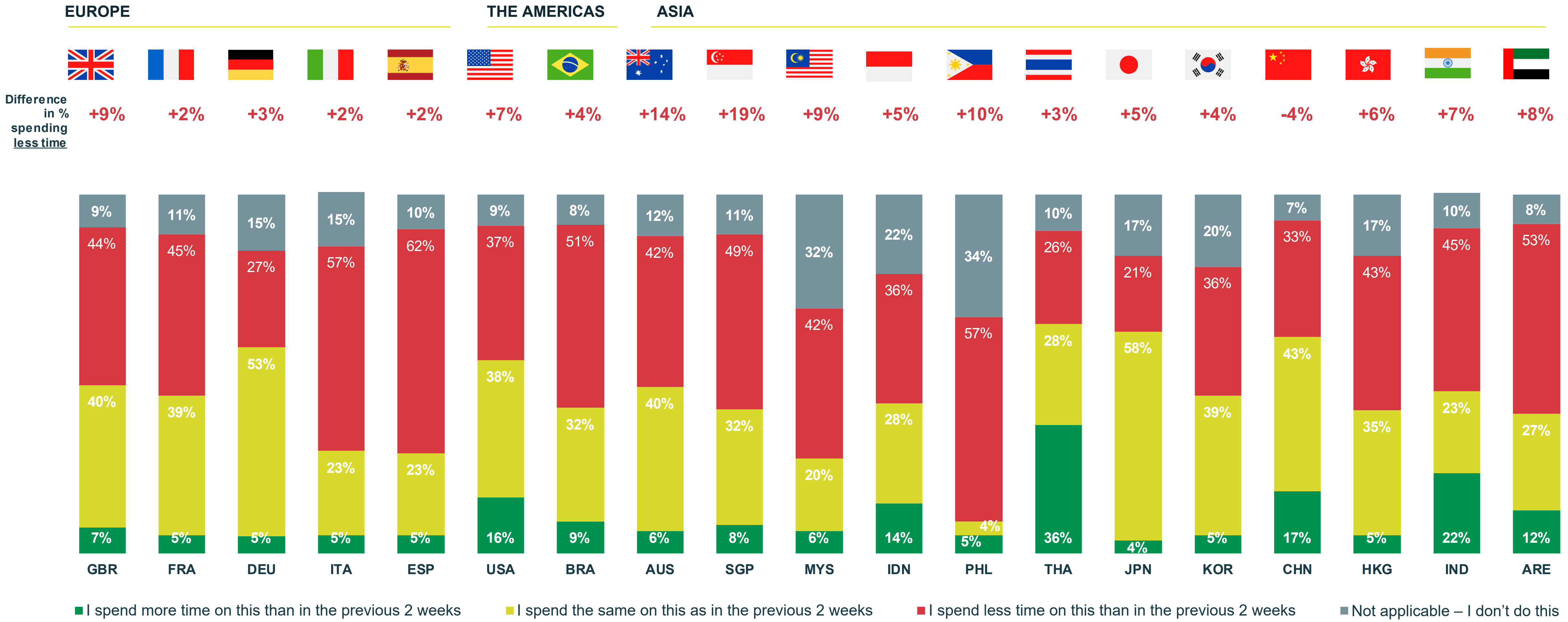


*Note – charts are not in proportion to each other by habit

Beauty

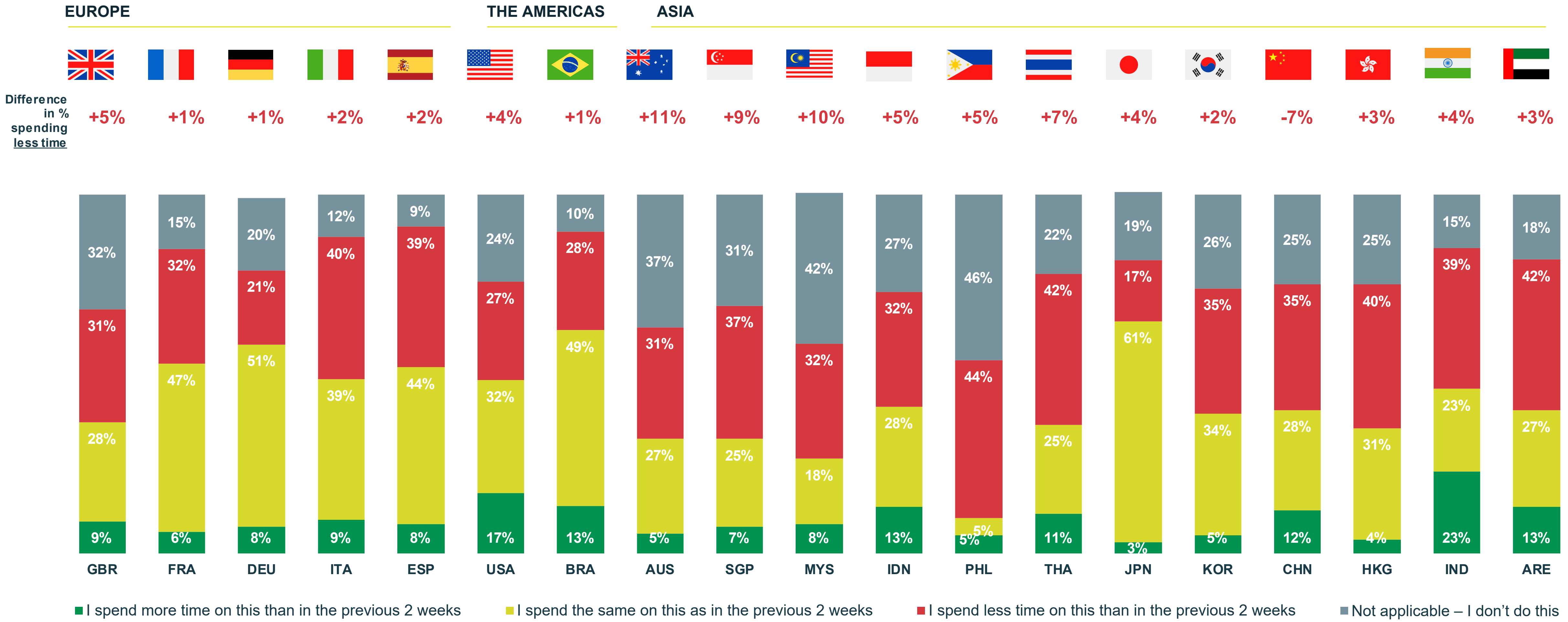
Change over the time spent on choosing what to wear in the past 2 weeks

Universally people are spending less time choosing what to wear than the two weeks before, as lockdown restrictions continue.



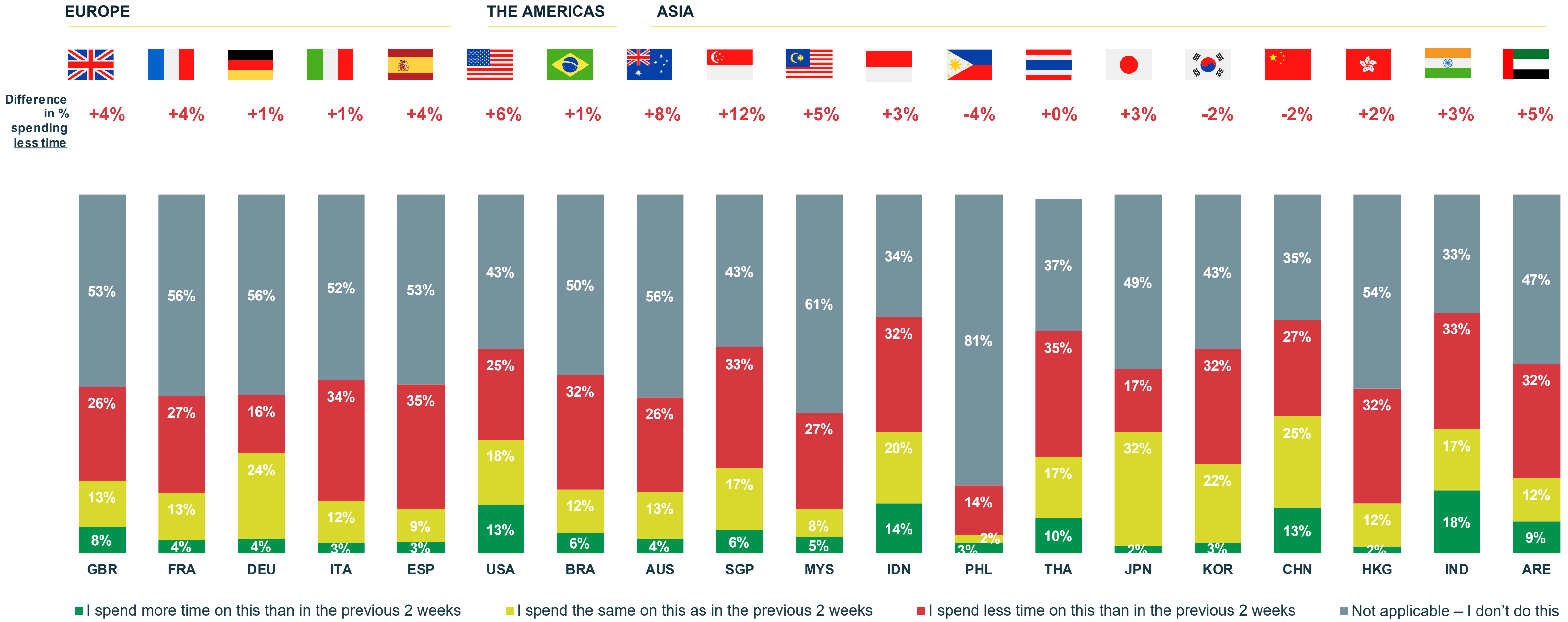
Change over the time spent on styling one's hair in the past 2 weeks

People are also spending even less time styling their hair in the past fortnight.



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

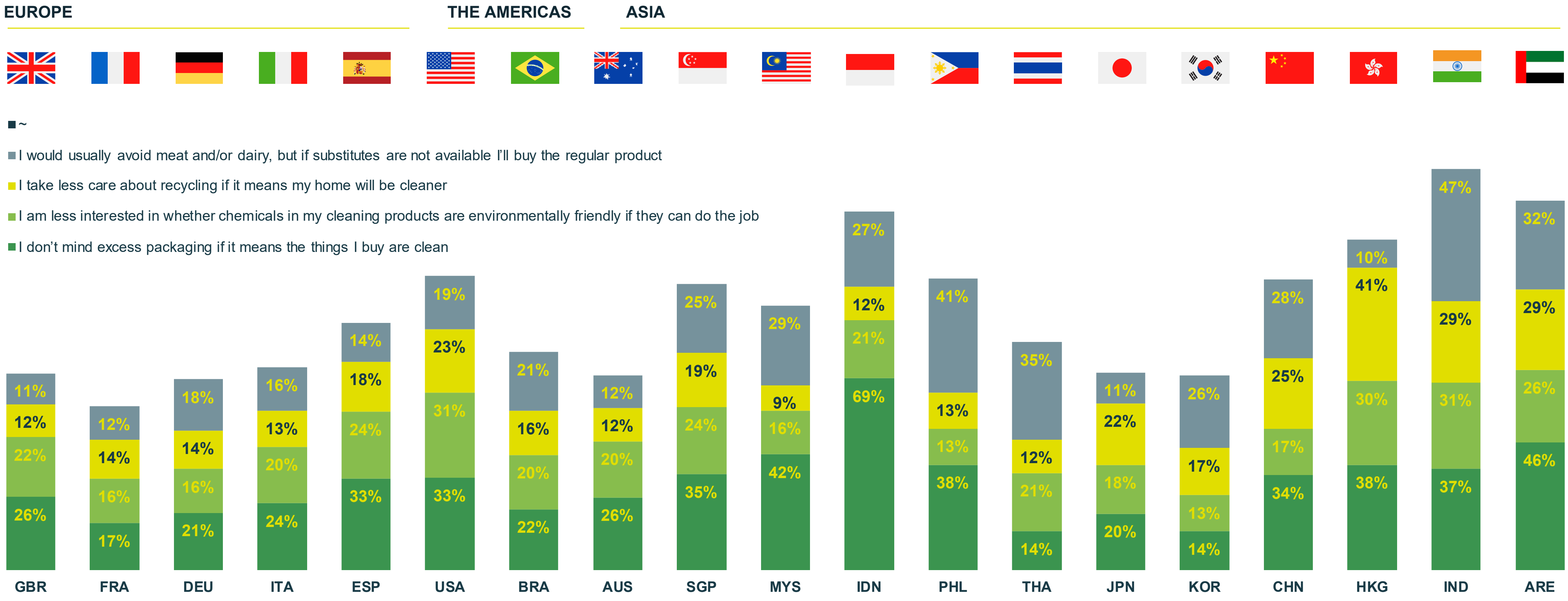
Similarly for make-up, people are also spending even less time putting on make up in the past couple of weeks.



Environment

Interest in environmental issues

Around the world people are admitting to being less concerned over excess packaging in order to have clean products and they also recycle less to keep their homes cleaner. For cleaning products, people are less interested in them being eco-friendly as long as they are effective. Finally, it seems that less choice and supply for those who avoid meat or dairy products is impacting their health and lifestyle choices.



Thank you!