

GLOBAL BAROMETER:

Consumer Reactions to COVID-19

Wave 4

toluna



harris
interactive

KURUNDATA



About this study

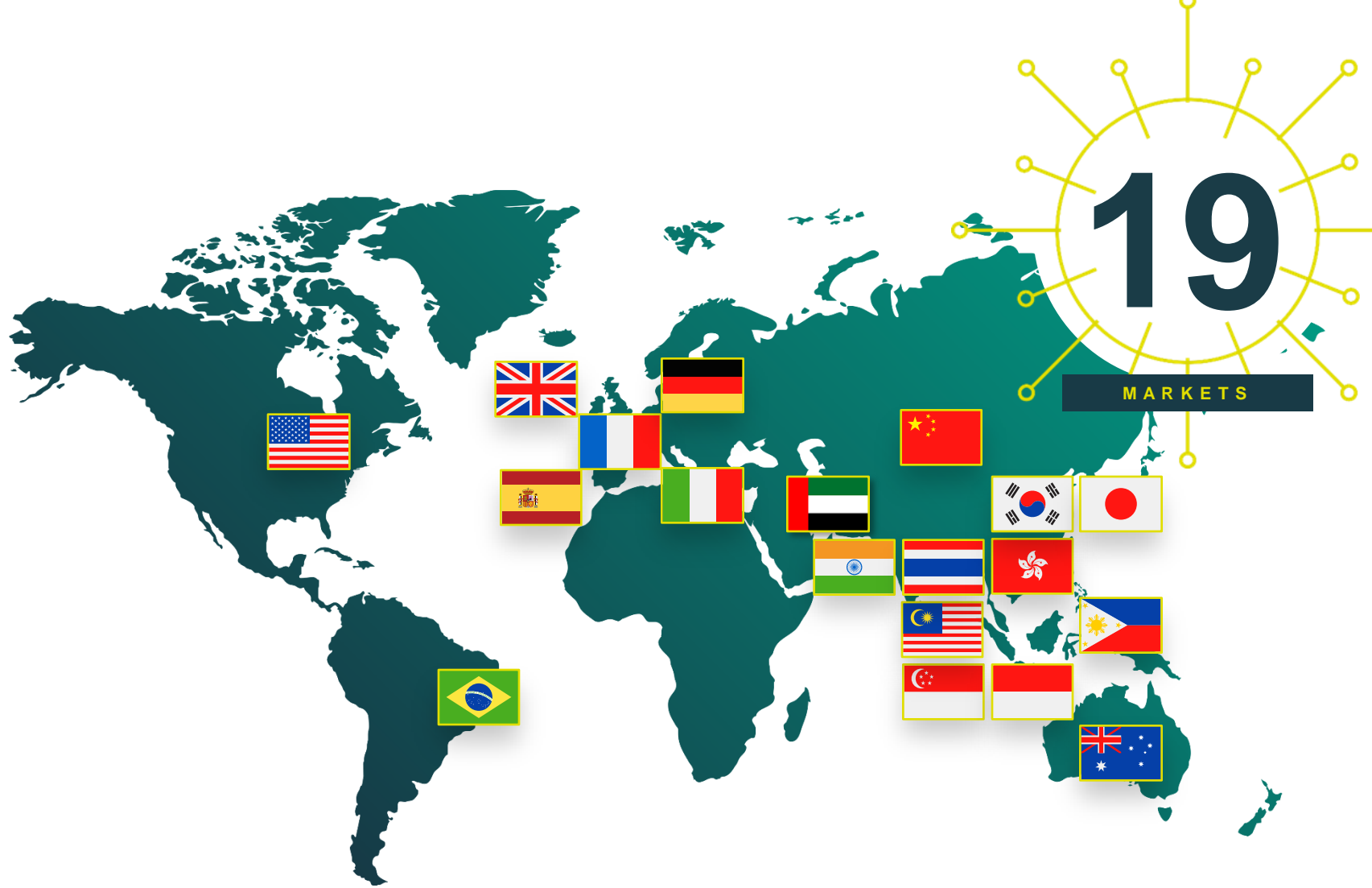
Together, ITWP companies Toluna, Harris Interactive and KuRunData developed an **ongoing study** to understand the impact that the Coronavirus has on daily life.

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.'*

This wave of our Barometer is the final in this series, next, we'll turn our attention to consumers as restrictions are lifted.



Wave 4: 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.

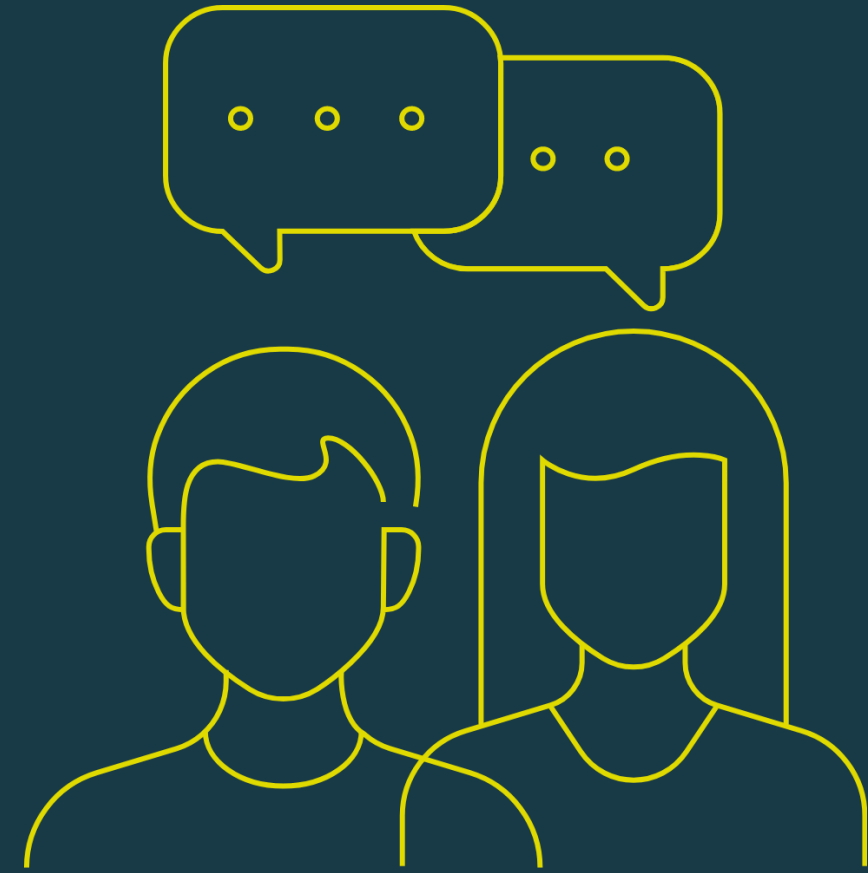
	MARKET	COMPLETED INTERVIEWS	FIELDWORK DATES
	UK	1,063	7 th - 12 th May 2020
	France	1,179	7 th - 12 th May 2020
	Germany	1,123	7 th - 12 th May 2020
	Italy	1,573	7 th - 12 th May 2020
	Spain	1,116	7 th - 12 th May 2020

	MARKET	COMPLETED INTERVIEWS	FIELDWORK DATES
	Australia	1,085	7 th - 12 th May 2020
	Singapore	640	8 th - 12 th May 2020
	Malaysia	484	7 th - 13 th May 2020
	Indonesia	615	7 th - 13 th May 2020
	Philippines	574	7 th - 13 th May 2020
	Thailand	771	7 th - 13 th May 2020
	Japan	1,186	7 th - 12 th May 2020
	Korea	1,034	7 th - 12 th May 2020
	China	1,070	7 th - 13 th May 2020
	Hong Kong	561	7 th - 13 th May 2020
	India	1,106	7 th - 12 th May 2020
	UAE	559	7 th - 13 th May 2020
	MARKET	COMPLETED INTERVIEWS	FIELDWORK DATES
	United States	1,009	7 th - 13 th May 2020
	Brazil	1,193	7 th - 12 th May 2020

Top Takeaways from the Barometer April – May

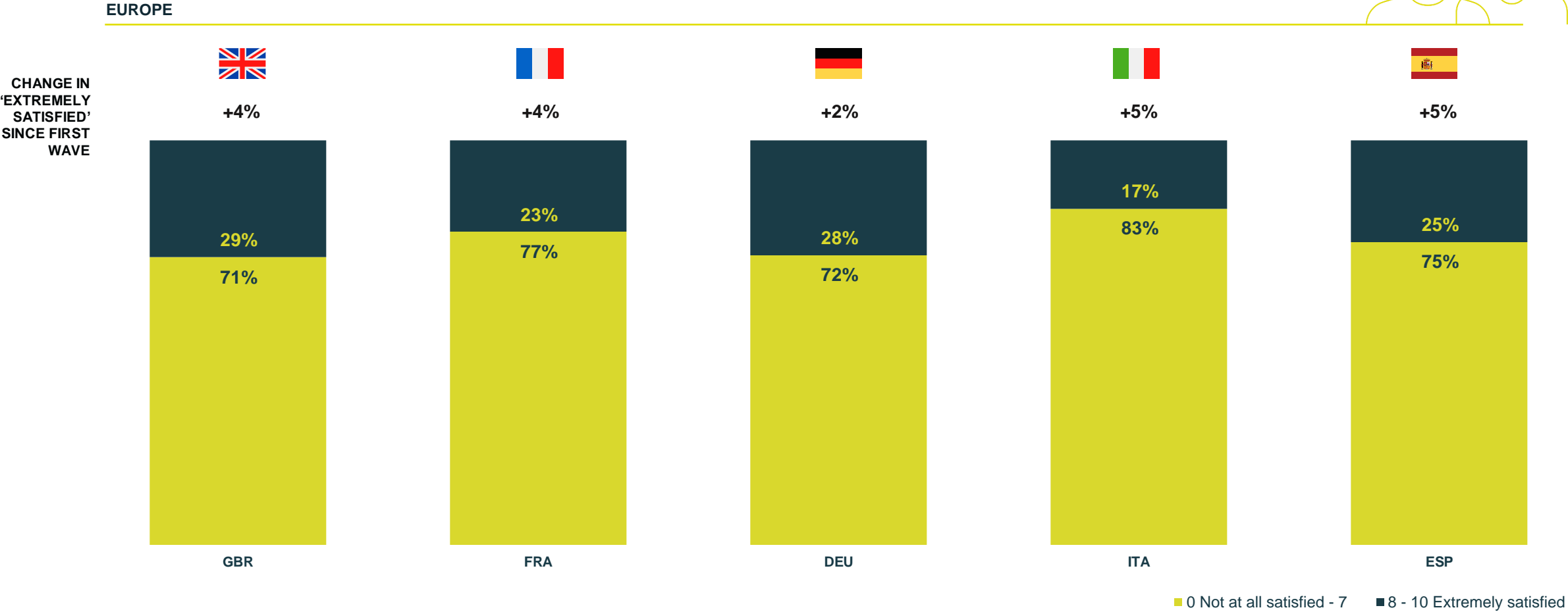
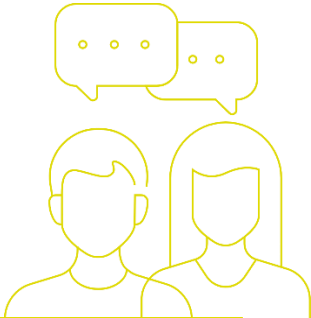
- In the eyes of consumers, brands haven't been perceived as supportive during this crisis. But retailers have been seen as front line responders with consumers, they have the benefit of having a consumer connection, which is especially important at this time.
- Consumers are stressed and behaving differently as a result. While they want to be health conscious and take care of themselves, they also have stopped exercising, are eating poorly, and in some cases drinking more frequently.
- Shopping behaviors have changed.
 - Initially, consumers felt concerned about getting staples. These concerns have eased, and purchasing canned goods, frozen food, and paper goods have normalized in recent weeks, however we will see long term impacts on purchasing.
 - We've also seen online ordering of groceries decrease in recent weeks. People feel more comfortable shopping in store.
 - When people couldn't buy products or services as normal, many went without or shopped around before trying new 'challenger' brands for core items. Americans were more likely than others to try a non-preferred/challenger brand.
- Many are looking forward to business as usual, and venturing out, but they will be report to be more conservative financially and take fewer health risks. Further, people plan to shop in store, however they'll shop less often overall – it's important to keep your core customers close.

Consumers reactions to the Coronavirus: Europe



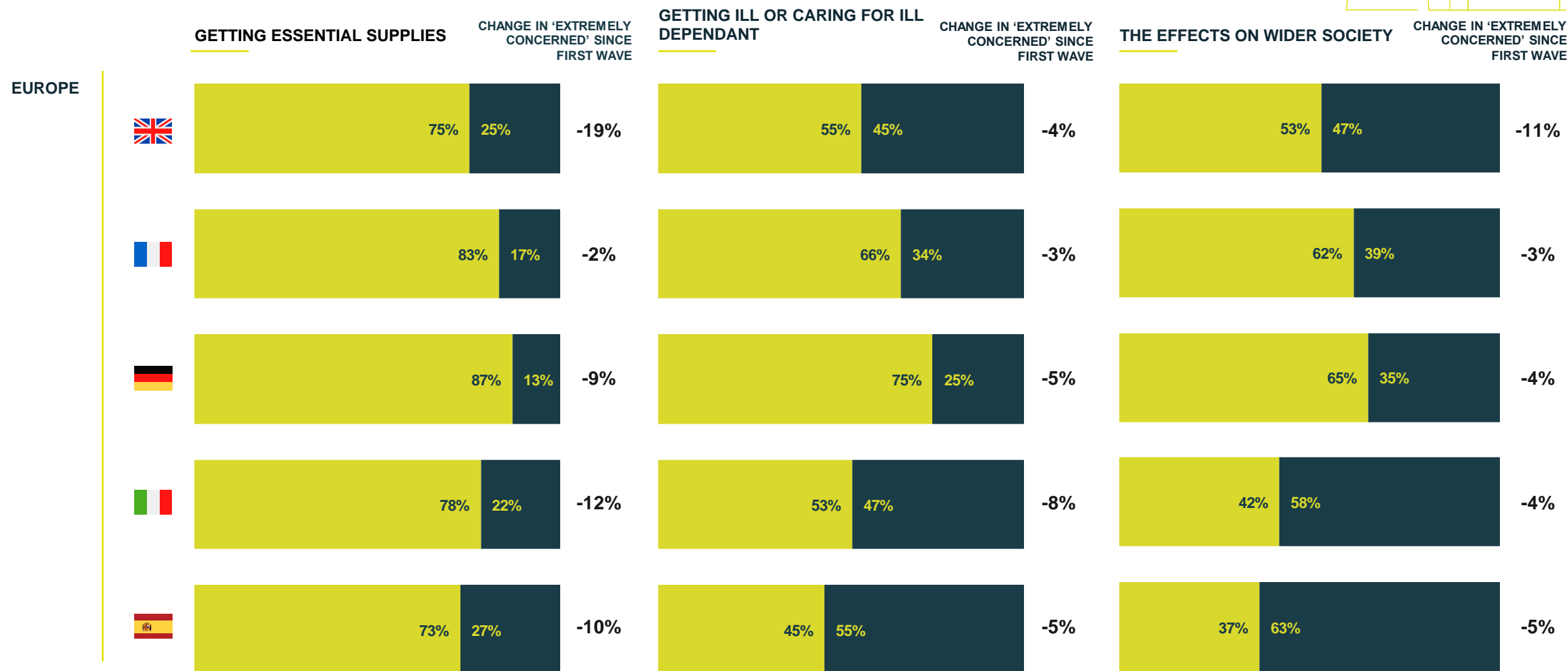
Level of **satisfaction with life** over the past 2 weeks

People throughout Europe feel more satisfied with their lives as compared to prior months.



Level of **concern** with different aspects because of the Coronavirus

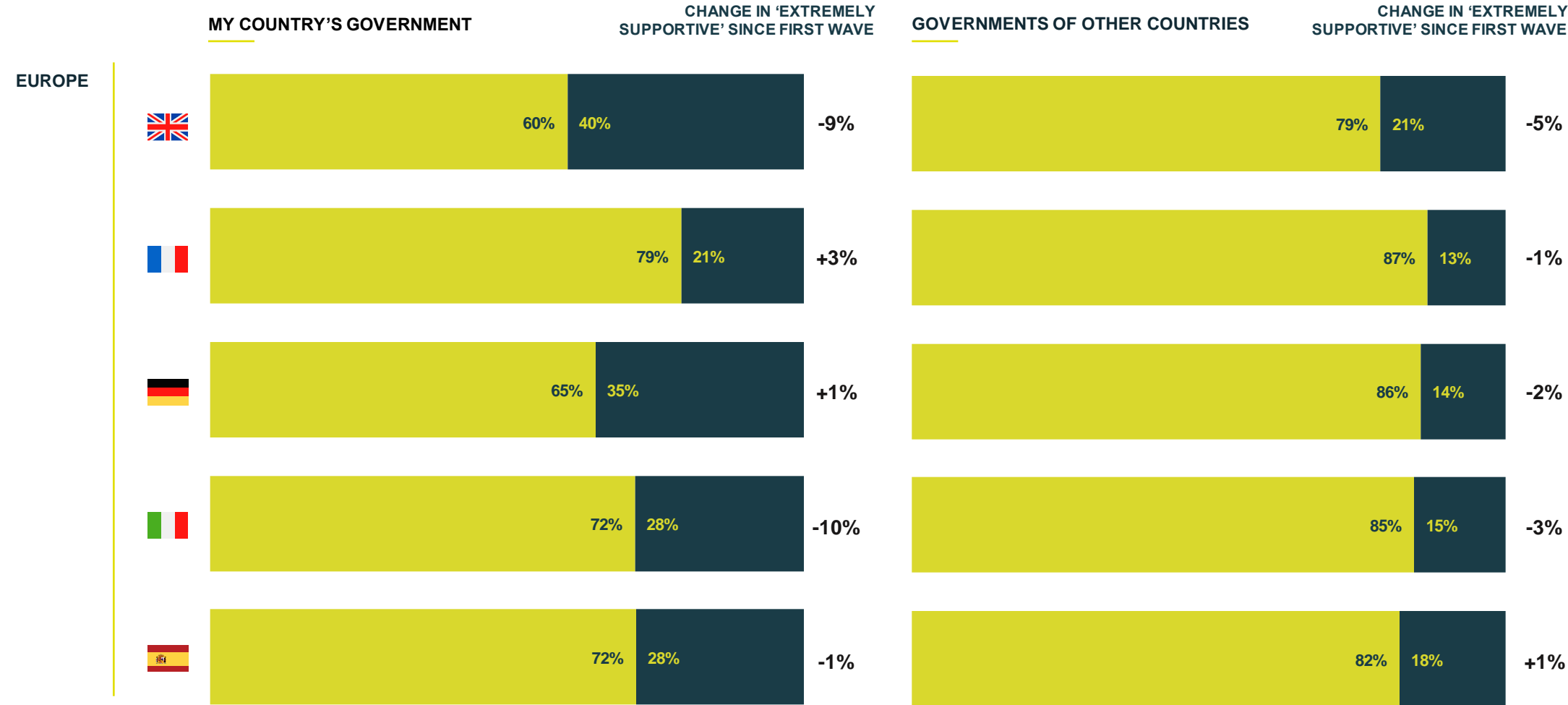
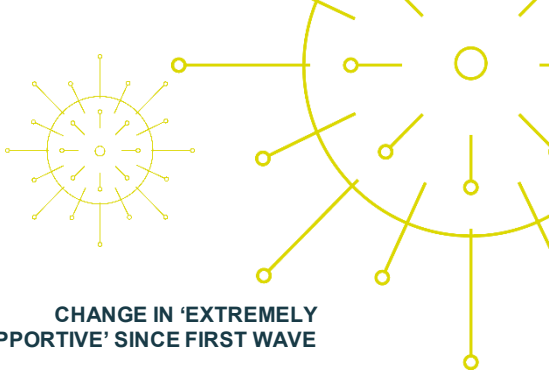
Distribution has normalized, and people are less concerned about getting essential supplies that were once scarce.



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

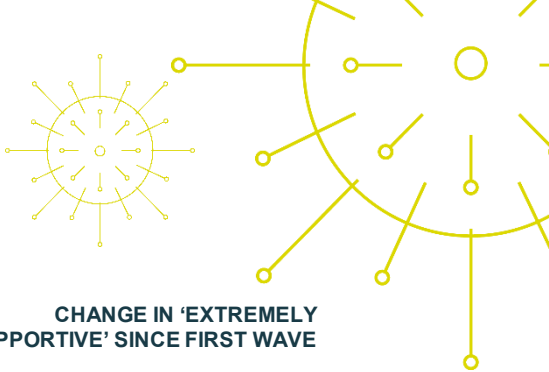
Level of support given in response to the Coronavirus outbreak

In most markets, people feel less confident in their government, but more confident in other countries' governments.



Level of support given in response to the Coronavirus outbreak

People’s level of support perceived by their employer has remained largely unchanged, and overall very positive.



Perceived level of security in employment over the past 6 weeks

People’s employment has been impacted by the Coronavirus. At the moment, those impacts are leveling off.



EUROPE



+2%



+1%



-5%

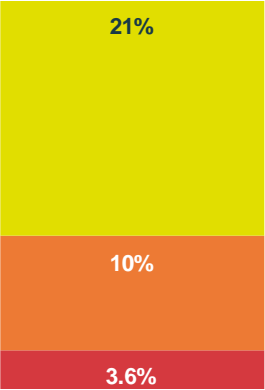


-1%

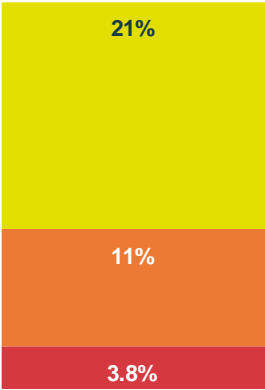


+2%

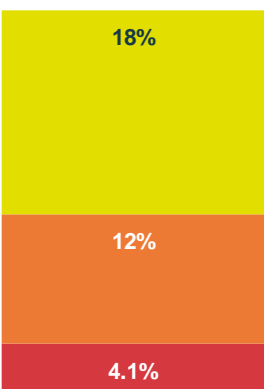
Difference from first wave in % feeling worried, having had employment reduced or terminated



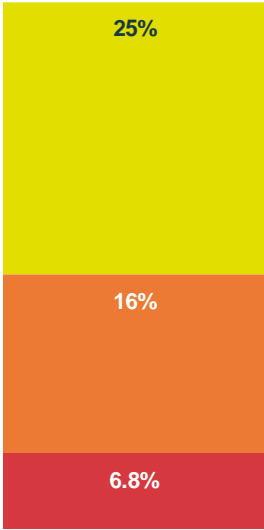
GBR



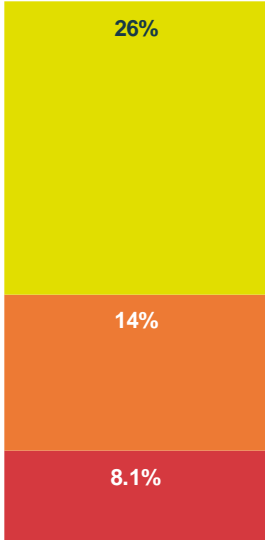
FRA



DEU



ITA



ESP

■ Have had their employment terminated since the coronavirus ■ Have had their employment reduced since the coronavirus ■ Feel worried

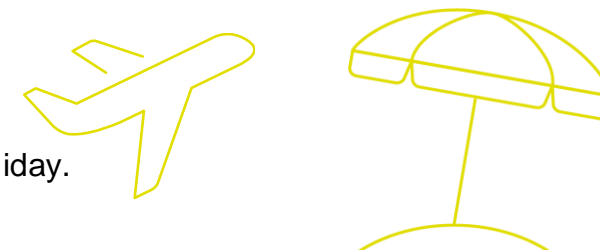
Coronavirus restrictions knock-on effects

Stress levels have decreased as compared to our first wave of findings, and we've seen people in Italy, in particular change the way that they eat, and coping behaviors. In the UK, we've seen many respond that they are drinking more.








Activities likely to undertake once the Coronavirus crisis is over

By and large, Italians (who have been under lock down for some time) report that they are looking forward to an in market holiday.



EUROPE

	Treat myself and family to a holiday abroad	Difference from first wave	Treat myself and family to a holiday in my country	Difference from first wave	Buy something of significant value	Difference from first wave	Spend more money generally	Difference from first wave	Go out more, such as to eat or the cinema	Difference from first wave
	23%	+2%	25%	+1%	10%	+3%	14%	+2%	28%	0%
	16%	-1%	32%	+4%	5%	+1%	10%	+1%	33%	-4%
	22%	+2%	27%	+5%	6%	0%	8%	0%	26%	+6%
	20%	-2%	45%	+6%	11%	+4%	9%	0%	29%	-6%
	15%	-5%	35%	-1%	7%	-1%	11%	-1%	35%	-3%

 Lowest scoring country for each measure

 Highest scoring country for each measure

Activities likely to undertake once the Coronavirus crisis is over

Further, Italians (more so than other markets) report to planning for the future, and taking care of their health. Most people are going to prepare financially and save.



EUROPE

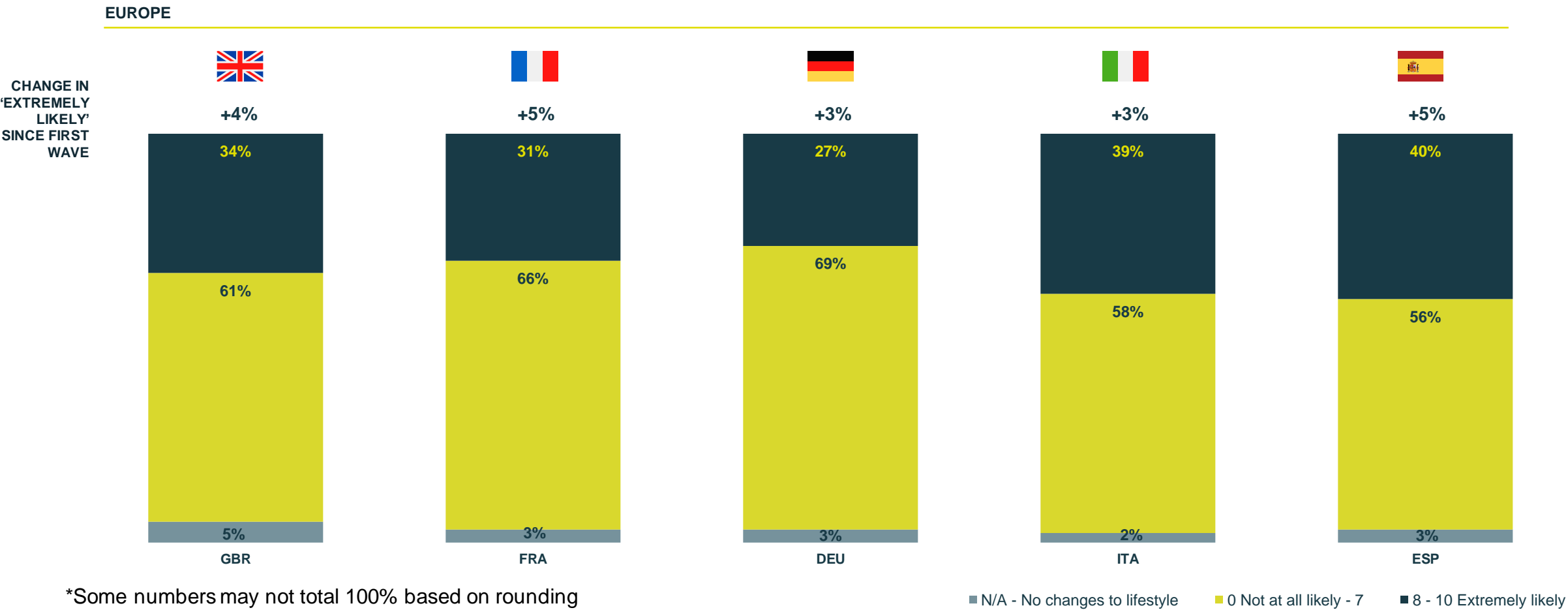
	Be less materialistic	Difference from first wave	Be more optimistic about the future	Difference from first wave	Be more health conscious	Difference from first wave	Be more environmentally conscious	Difference from first wave	Save money to prepare for a rainy day	Difference from first wave	Take out insurance to cover illness/loss of holidays etc.	Difference from first wave
	22%	+2%	29%	-3%	36%	+1%	25%	+5%	34%	+8%	6%	-1%
	22%	+3%	21%	+1%	35%	+2%	32%	+5%	27%	+6%	5%	+1%
	20%	0%	21%	-2%	30%	+2%	22%	+3%	26%	+2%	6%	+1%
	25%	-1%	28%	-1%	53%	+3%	41%	+3%	44%	+4%	9%	+1%
	33%	+1%	26%	-6%	48%	0%	32%	+1%	49%	+9%	10%	0%

Lowest scoring country for each measure

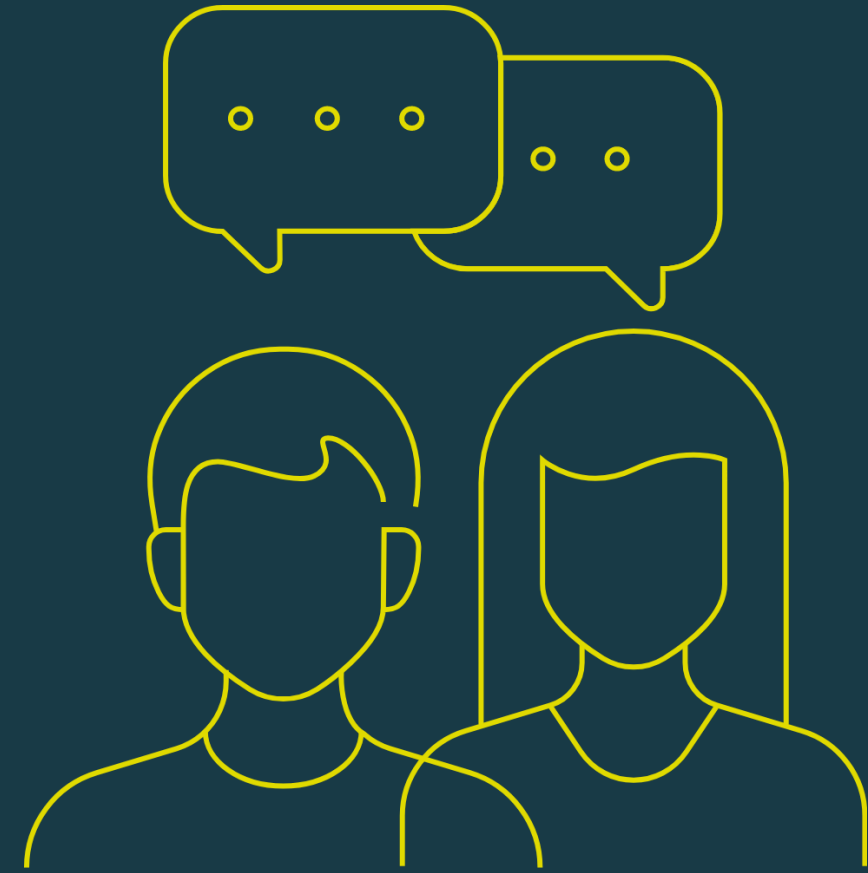
Highest scoring country for each measure

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?

In general, we find that the Coronavirus has lead to many behaviors that are here to stay.

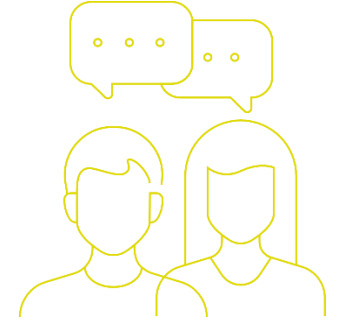


Consumers reactions to the Coronavirus: US



Level of **satisfaction with life** over the past 2 weeks

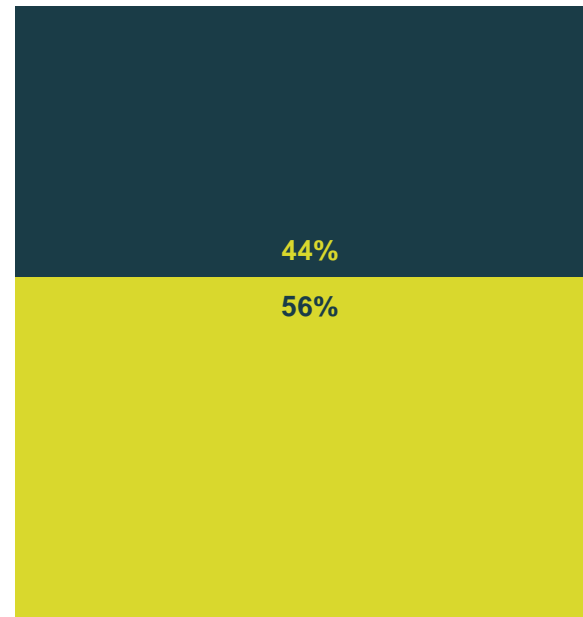
In the US, people are more satisfied than those in Europe, and APAC, as it relates to the crisis.



CHANGE IN 'EXTREMELY
SATISFIED' SINCE FIRST WAVE



+1%



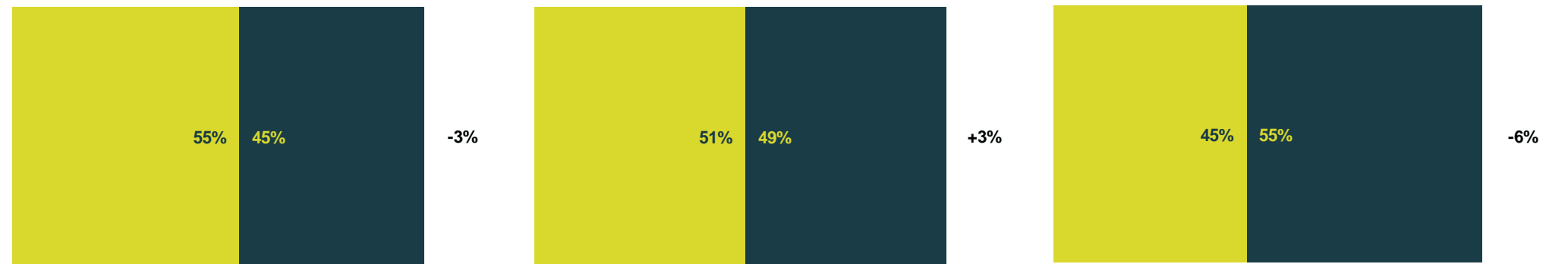
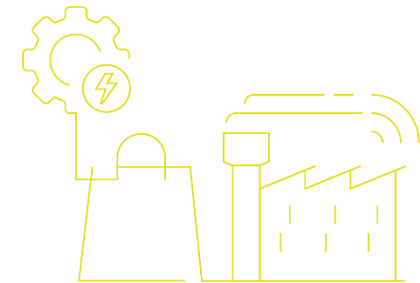
USA

■ 8 - 10 Extremely satisfied

■ 0 Not at all satisfied - 7

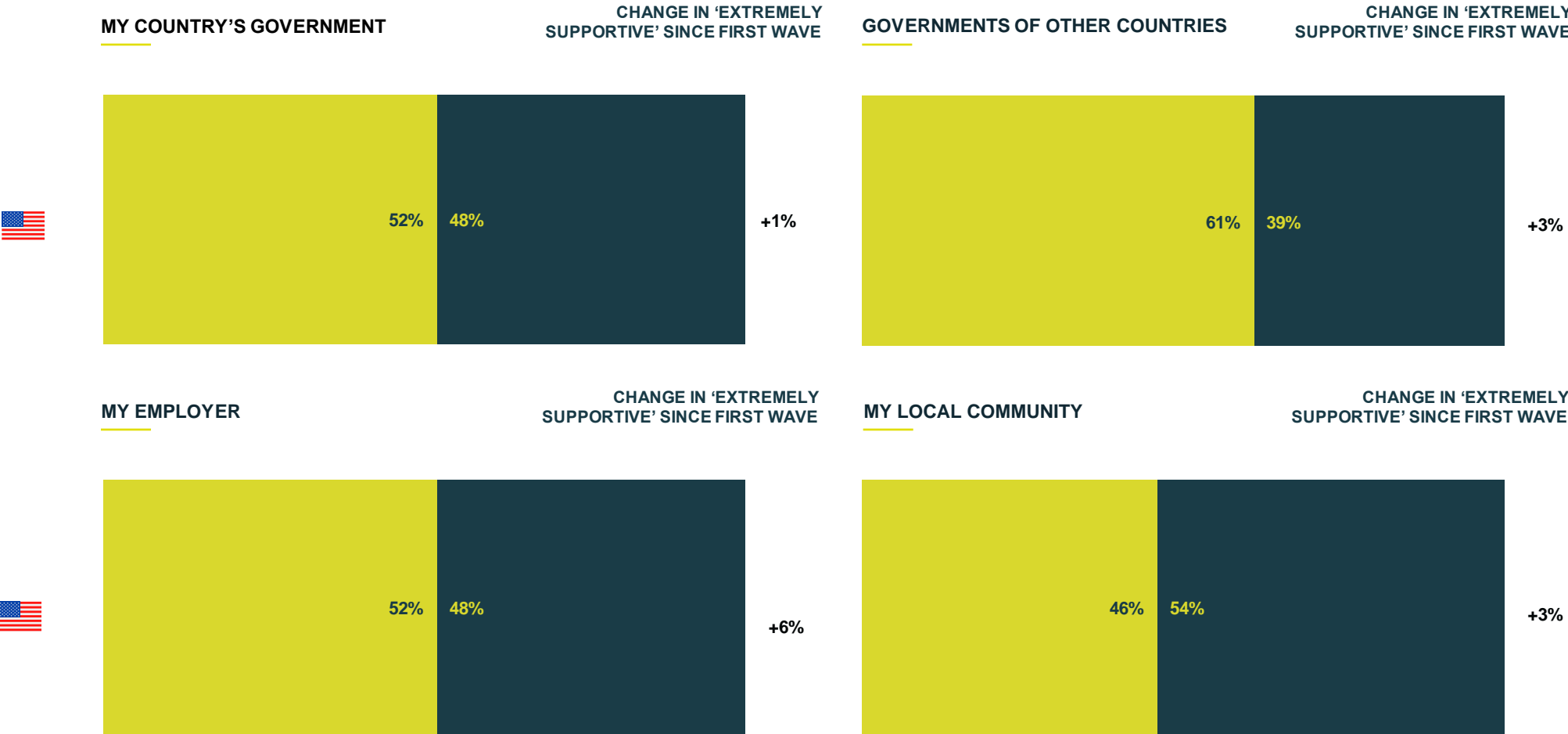
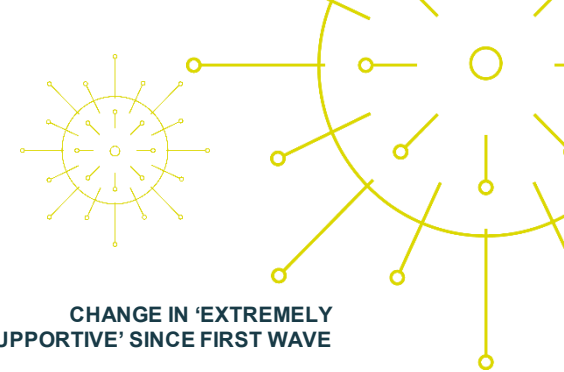
Level of concern with different aspects because of the Coronavirus

They remain concerned about caring for ill dependents, less so about getting supplies.



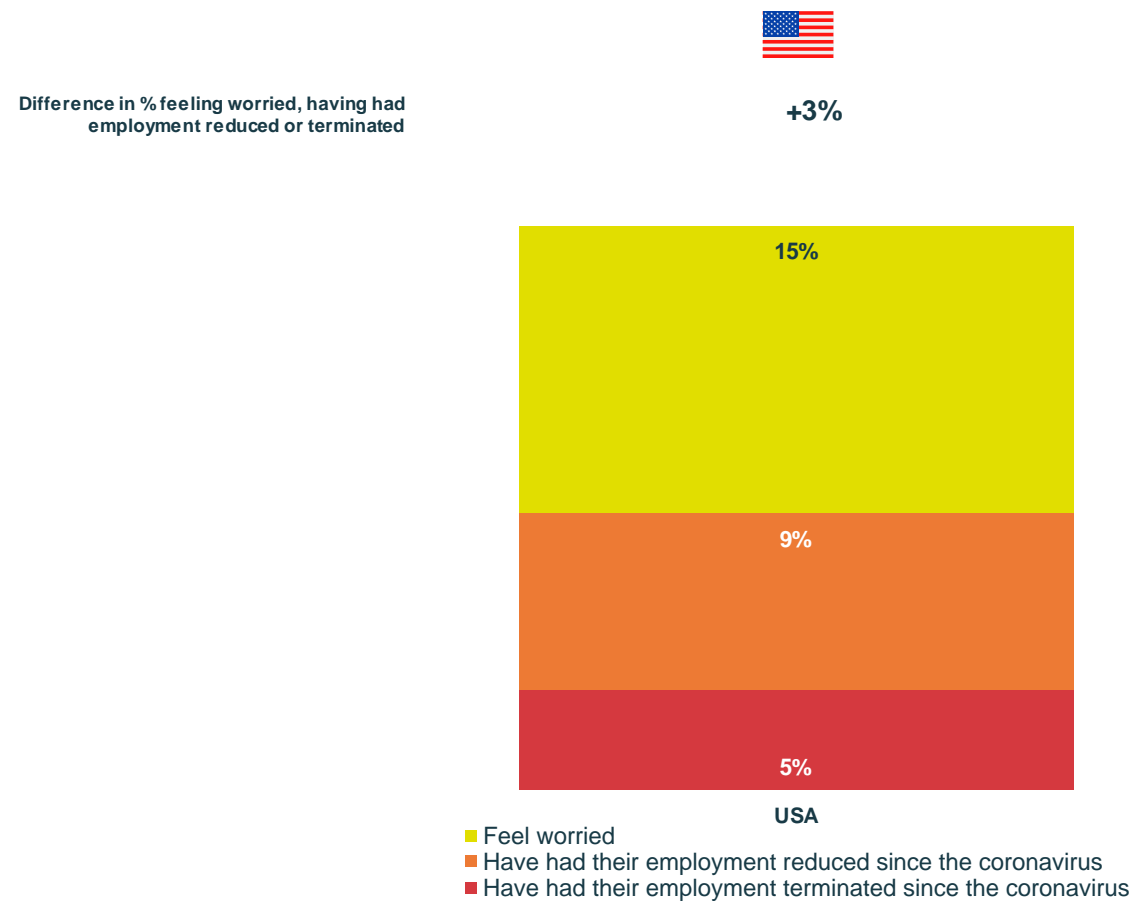
Level of support given in response to the Coronavirus outbreak

In the last few weeks, however, Americans feel more supported both by their own government, and their employer as well as their community.



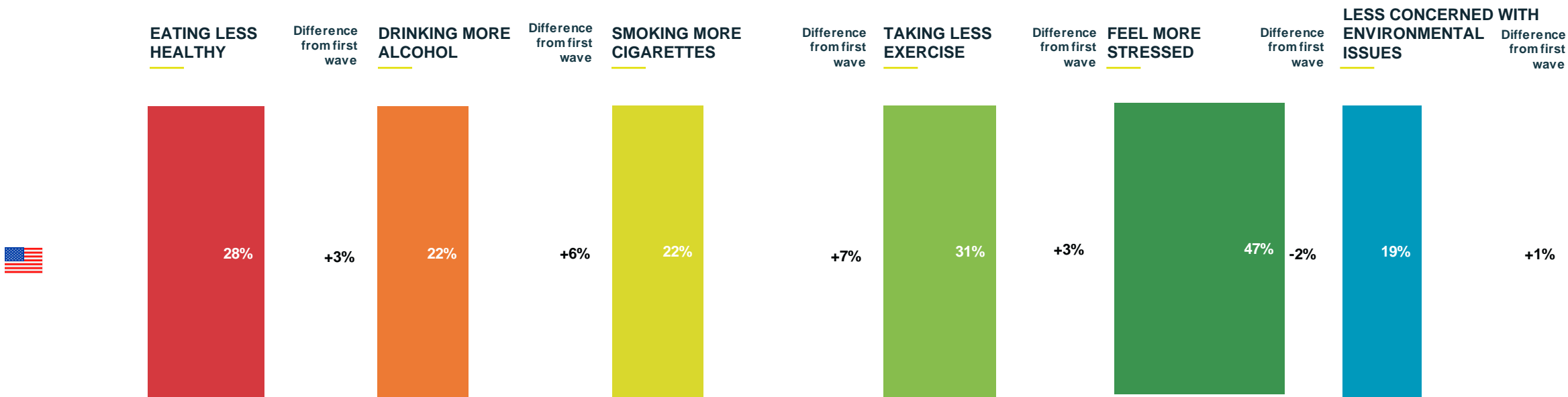
Perceived level of security in employment over the past 6 weeks

In the US, people have remained concerned about their employment.



Coronavirus restrictions **knock-on effects**

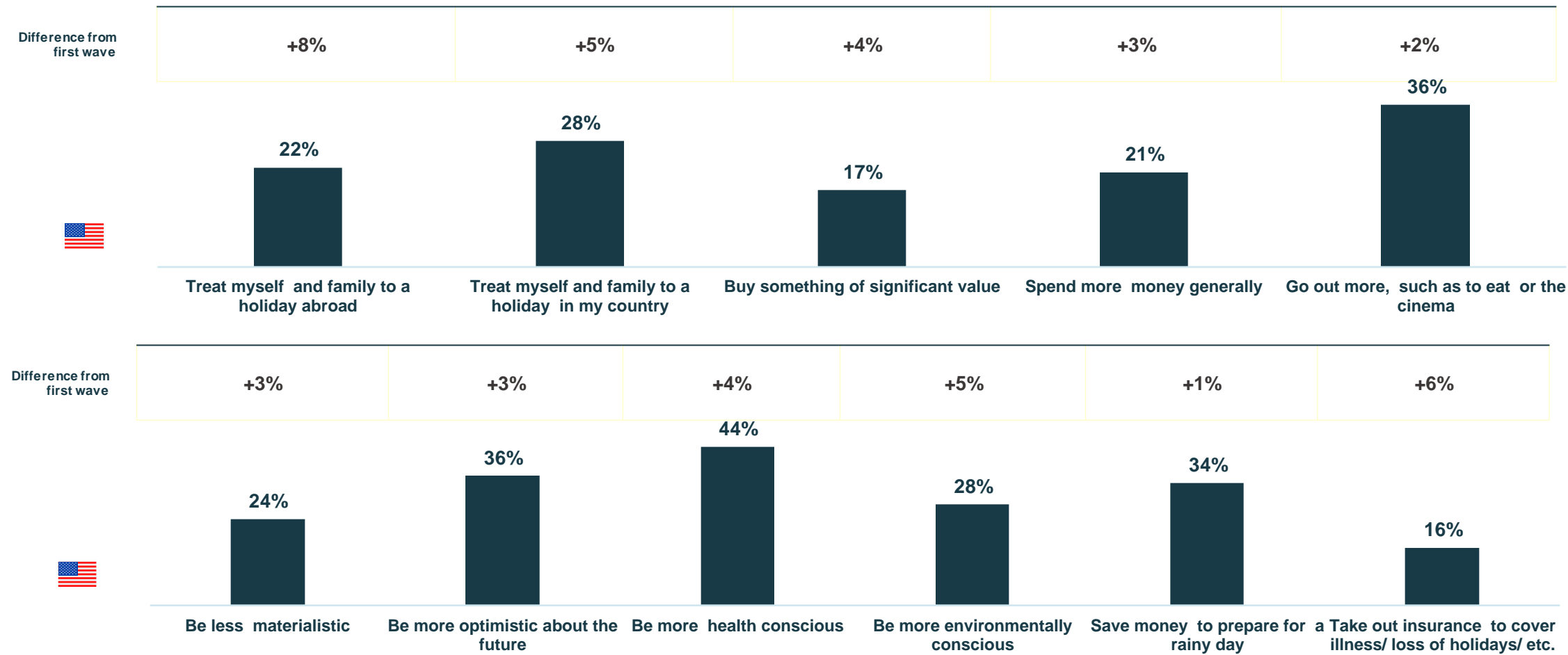
Similar to Europe, Americans are eating less healthy, and taking less exercise. While stress has subsided somewhat, these behaviors remain.



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

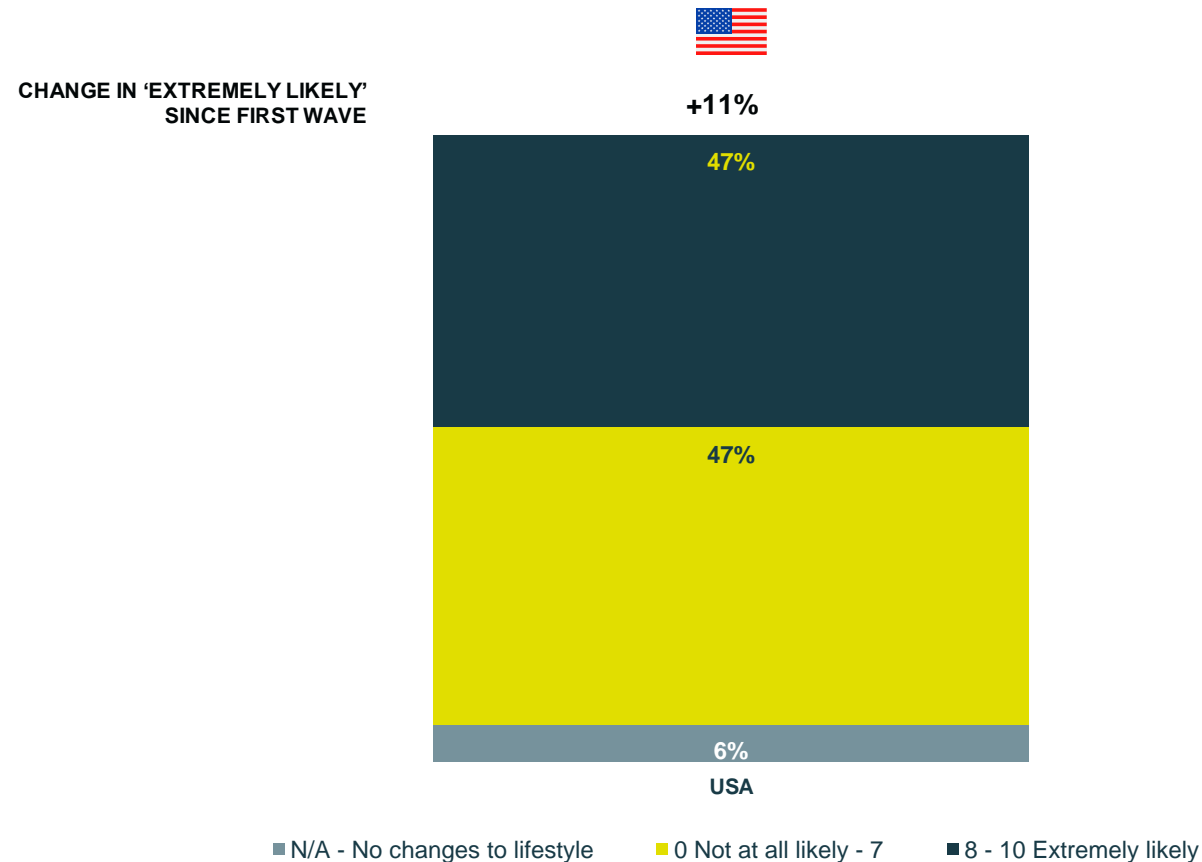
Activities likely to undertake once the Coronavirus crisis is over

Americans plan to be more health conscious post crisis, and will enjoy trips to the movies. Further, Americans plan to take a vacation both abroad and in country, more so now than at the start of the crisis.



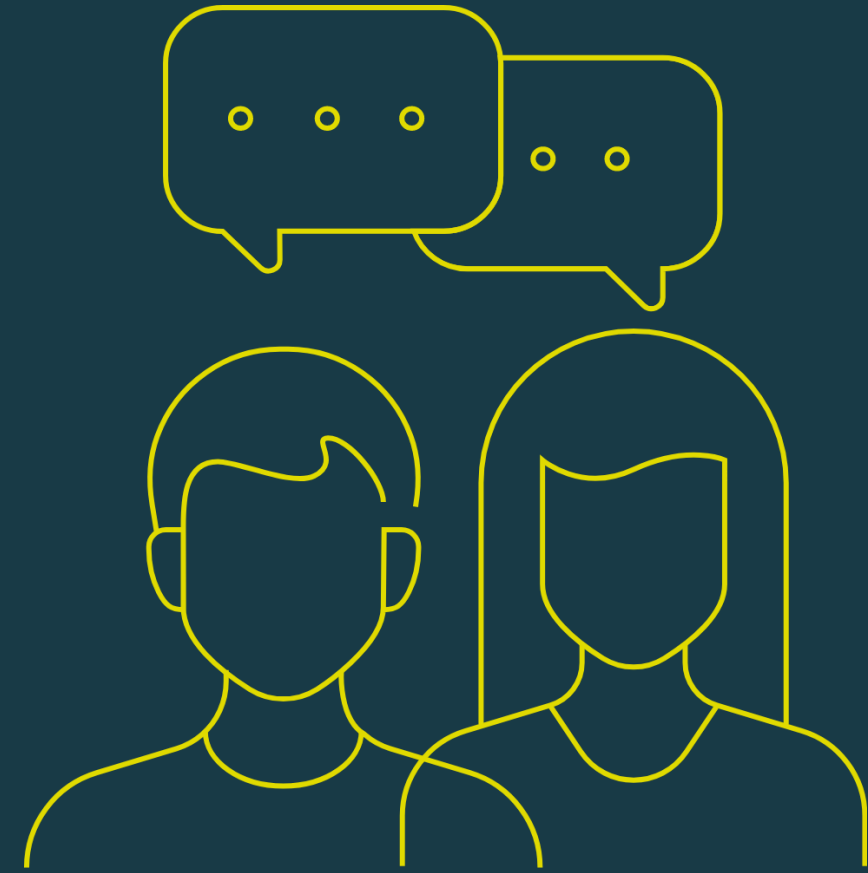
Considering **changes you have made** to your behaviour since the beginning of coronavirus outbreak, how likely are you to make these part of your lifestyle in the future?

Americans too, plan to retain behaviors they've picked up during the Coronavirus.



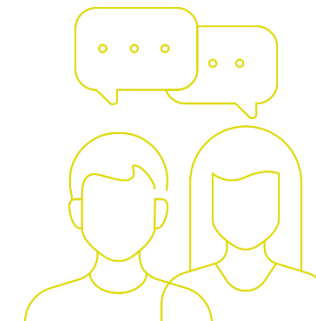
*Some numbers may not total 100% based on rounding

Consumers reactions to the Coronavirus: Brazil

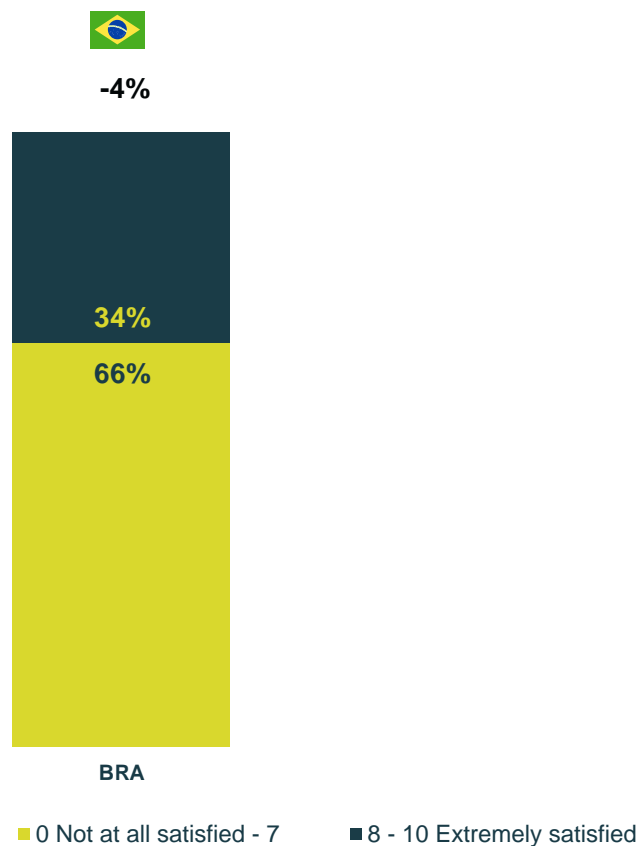


Level of satisfaction with life over the past 2 weeks

In Brazil, people are less satisfied now than they were weeks ago, at the start of the crisis.

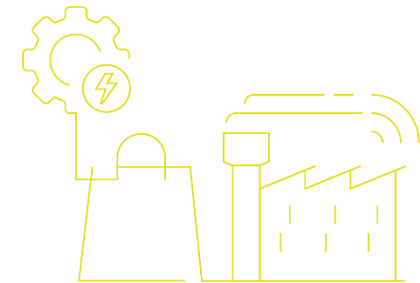


CHANGE IN 'EXTREMELY
SATISFIED' SINCE FIRST WAVE



Level of concern with different aspects because of the Coronavirus

Concerns about getting essential supplies have subsided.



GETTING ESSENTIAL SUPPLIES

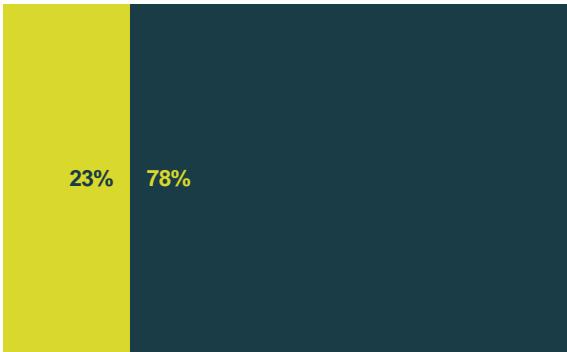
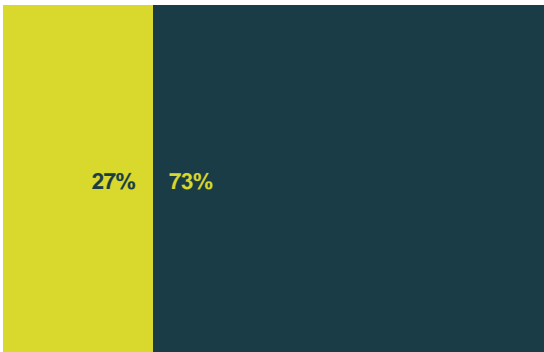
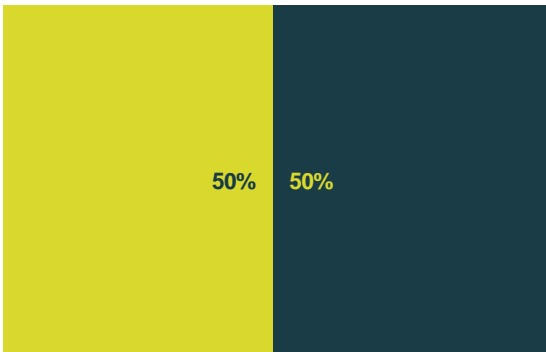
CHANGE IN 'EXTREMELY CONCERNED' SINCE FIRST WAVE

GETTING ILL OR CARING FOR ILL DEPENDANT

CHANGE IN 'EXTREMELY CONCERNED' SINCE FIRST WAVE

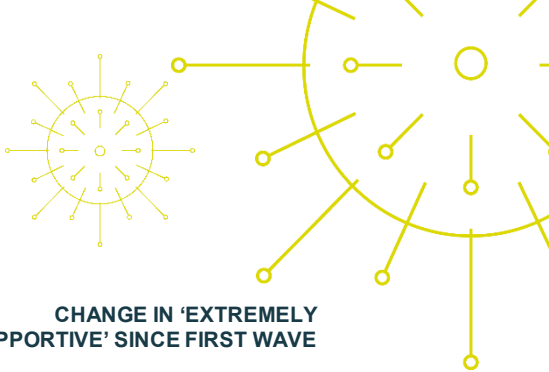
THE EFFECTS ON WIDER SOCIETY

CHANGE IN 'EXTREMELY CONCERNED' SINCE FIRST WAVE



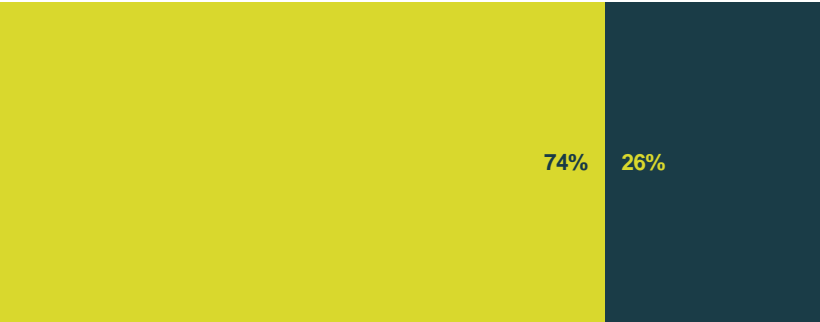
Level of support given in response to the Coronavirus outbreak

However, Brazilians are very concerned about their government’s response to the outbreak, and don’t feel a sense of community support.



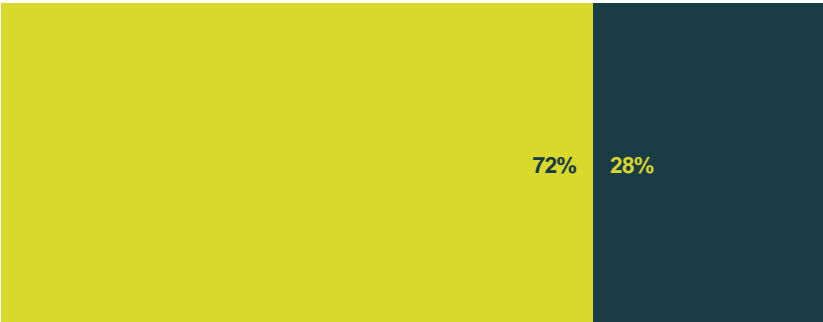
MY COUNTRY’S GOVERNMENT

CHANGE IN ‘EXTREMELY SUPPORTIVE’ SINCE FIRST WAVE



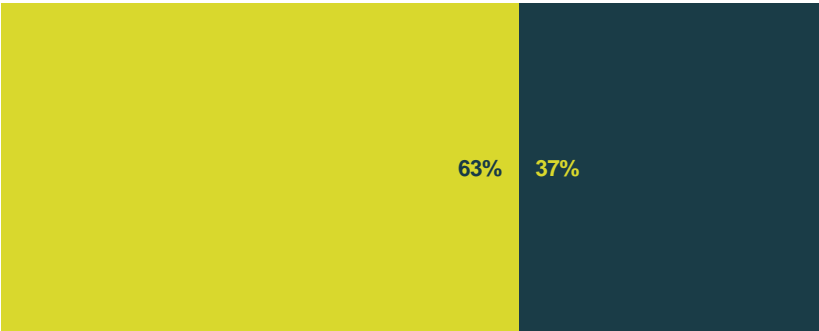
GOVERNMENTS OF OTHER COUNTRIES

CHANGE IN ‘EXTREMELY SUPPORTIVE’ SINCE FIRST WAVE



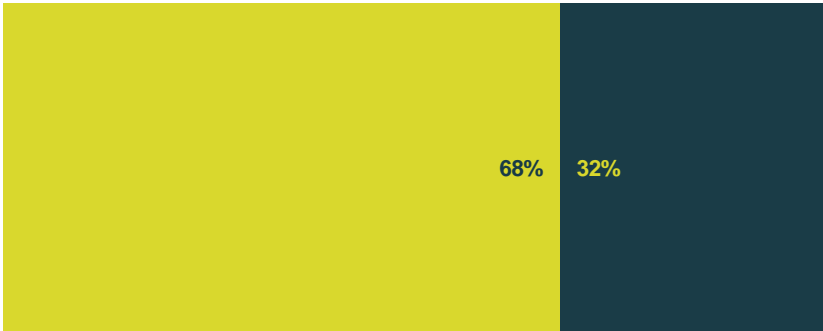
MY EMPLOYER

CHANGE IN ‘EXTREMELY SUPPORTIVE’ SINCE FIRST WAVE



MY LOCAL COMMUNITY

CHANGE IN ‘EXTREMELY SUPPORTIVE’ SINCE FIRST WAVE



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

Perceived level of security in employment over the past 6 weeks

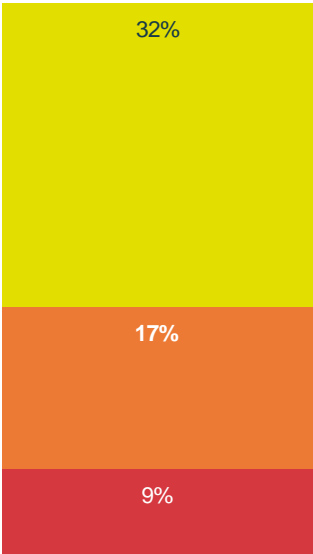
Brazilians are more concerned about employment than they were at the start of the crisis.



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



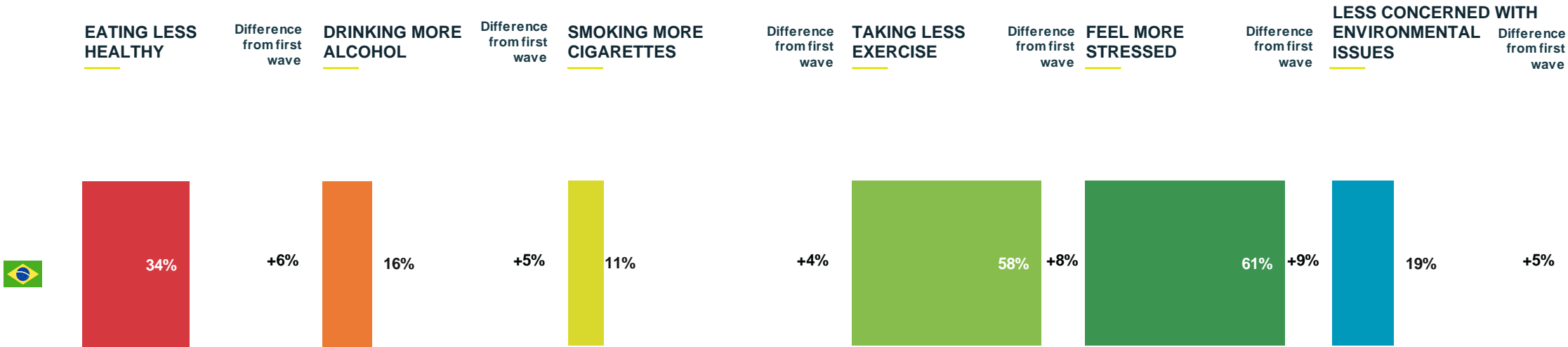
+5%



- Feel worried
- Have had their employment reduced since the coronavirus
- Have had their employment terminated since the coronavirus

Coronavirus restrictions knock-on effects

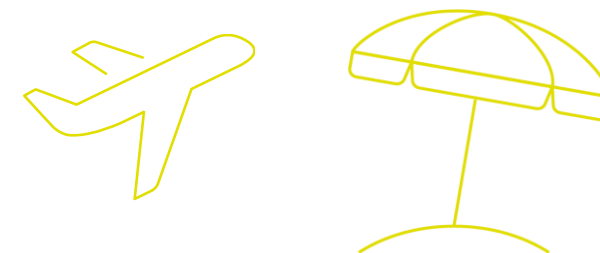
Brazilians, more than any geography, are taking less exercise and report higher levels of overall stress.



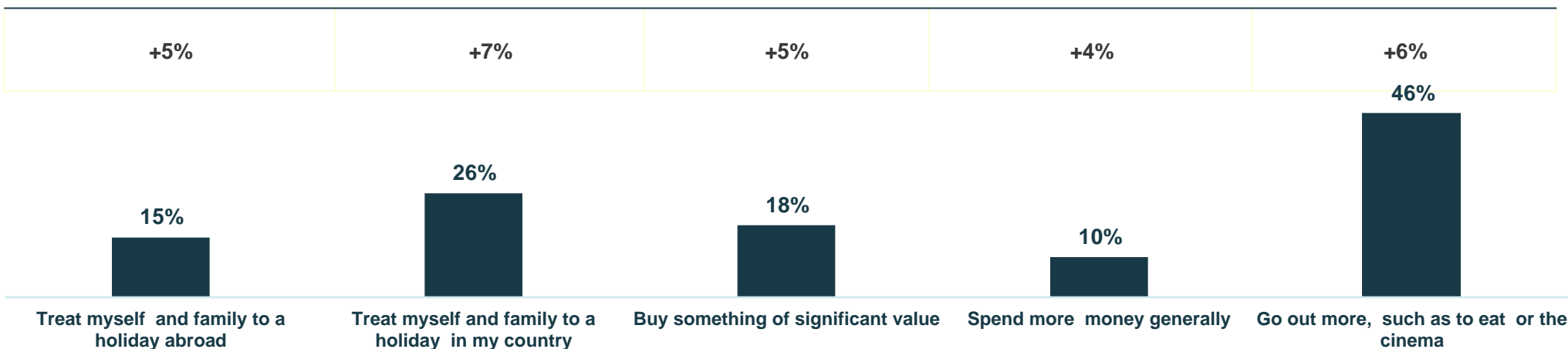
*Note – charts are not in proportion to each other by habit

Activities likely to undertake once the Coronavirus crisis is over

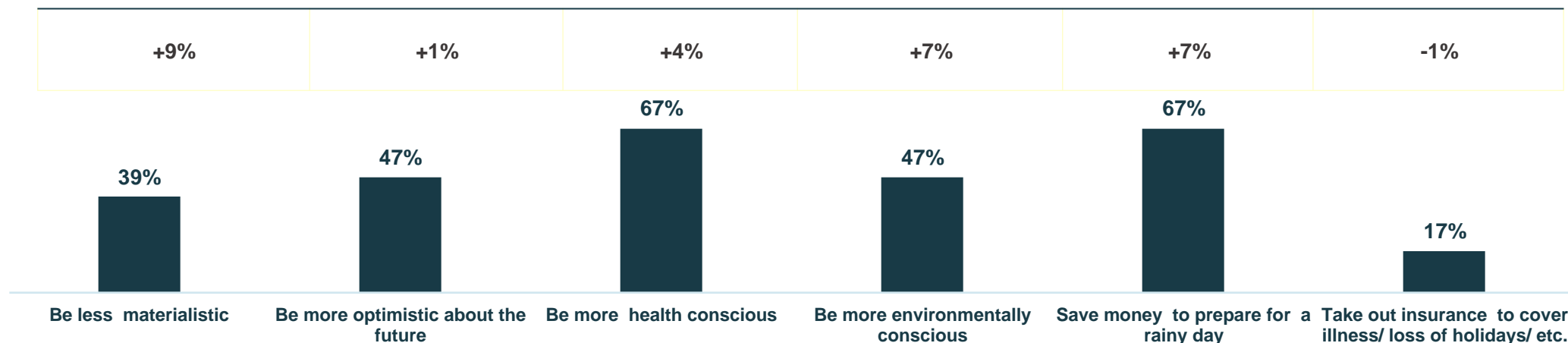
In Brazil, many plan to be more health conscious and take care of themselves after the crisis, they also plan to save more in the future.



Difference from first wave

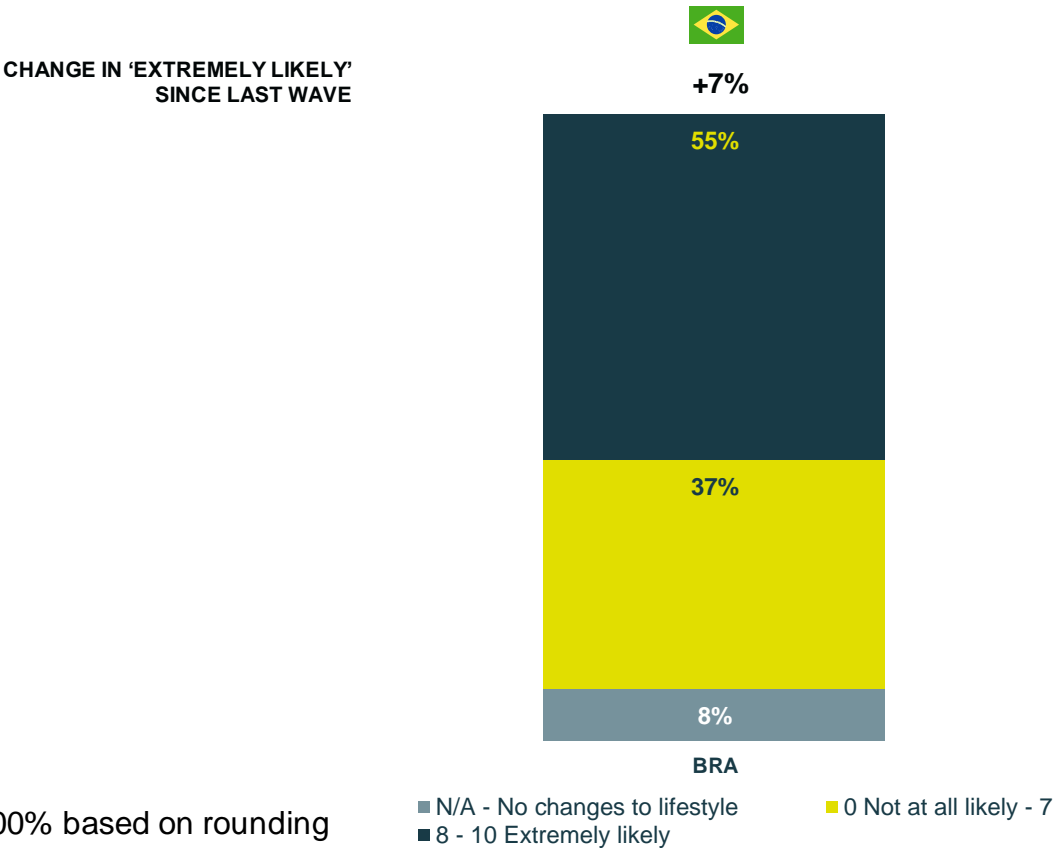


Difference from first wave

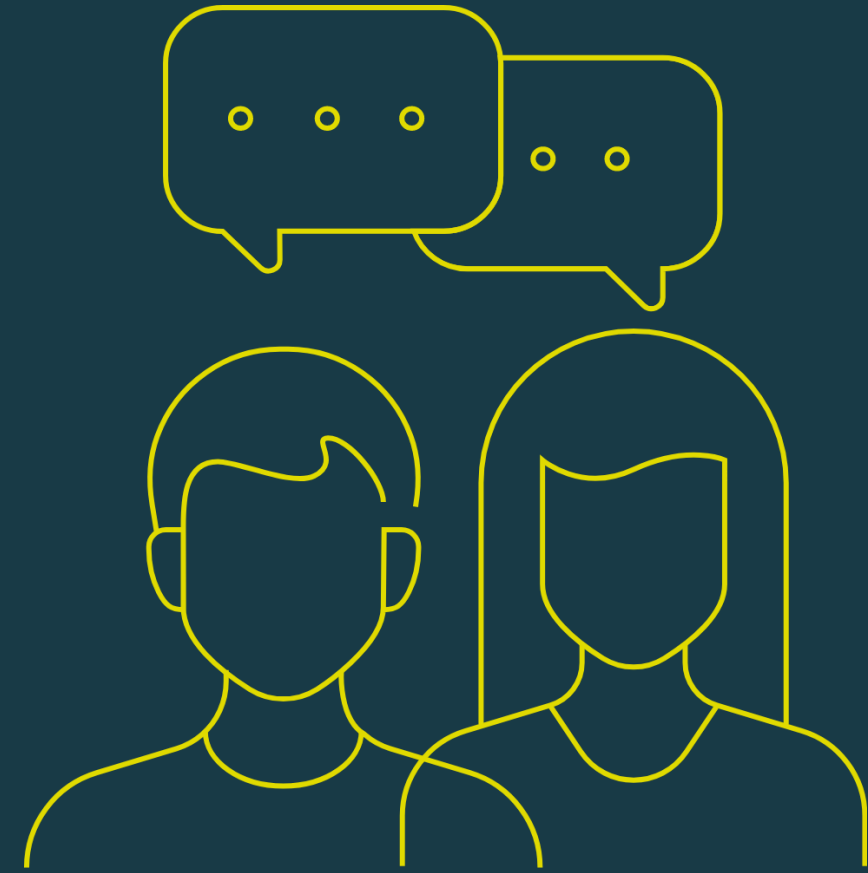


Considering changes you have made to your behaviour since the beginning of coronavirus outbreak, how likely are you to make these part of your lifestyle in the future?

Many plan to continue with changes they've made during the crisis.

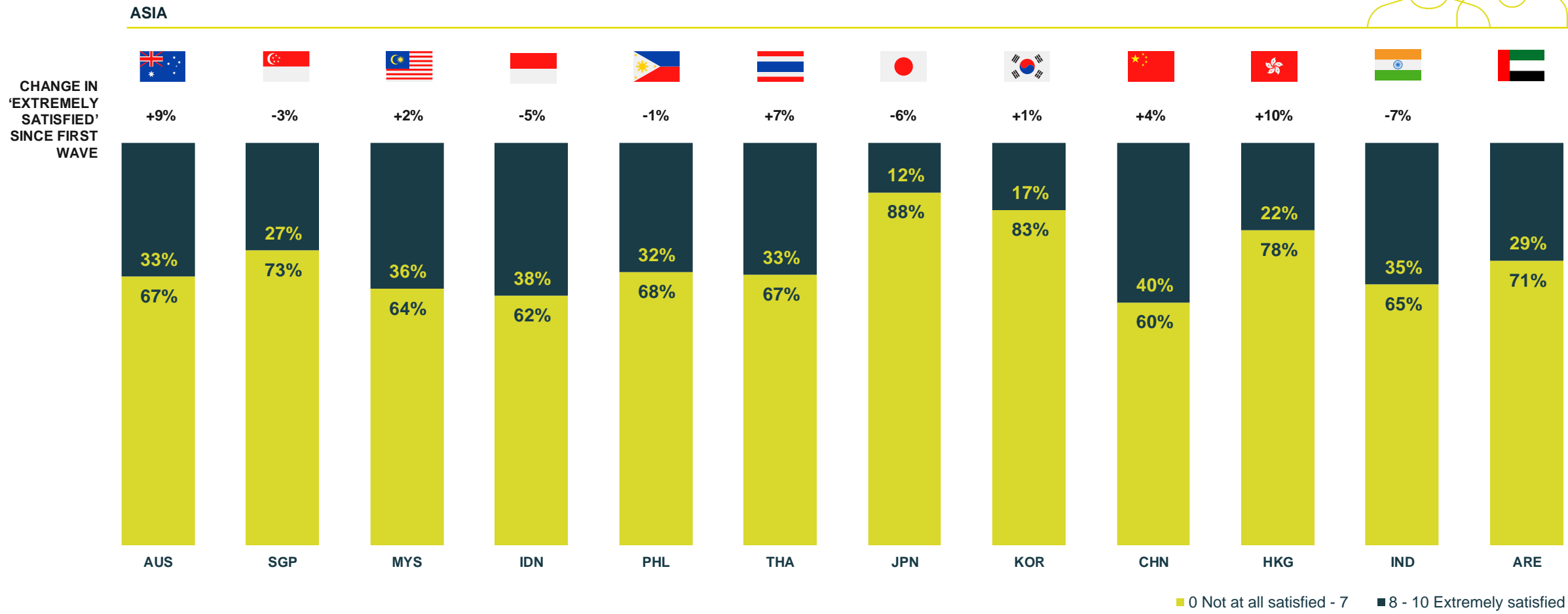


Consumers reactions to the Coronavirus: Asia



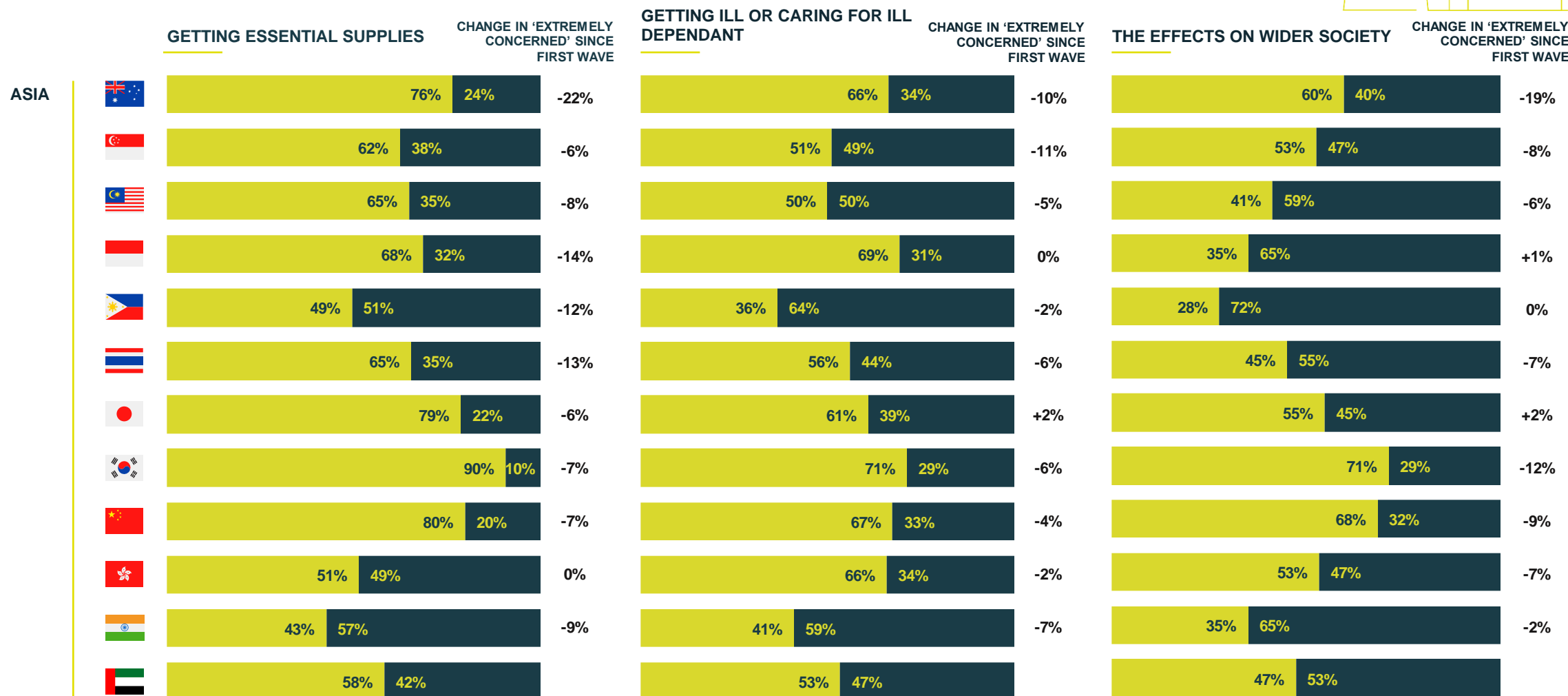
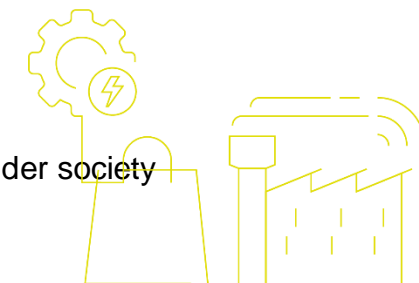
Level of satisfaction with life over the past 2 weeks

The level of satisfaction has increased in most APAC countries since the beginning of the crisis, but there has been sharp decreases in India, Indonesia and Japan – where the level of satisfaction is the lowest worldwide



Level of concern with different aspects because of the Coronavirus

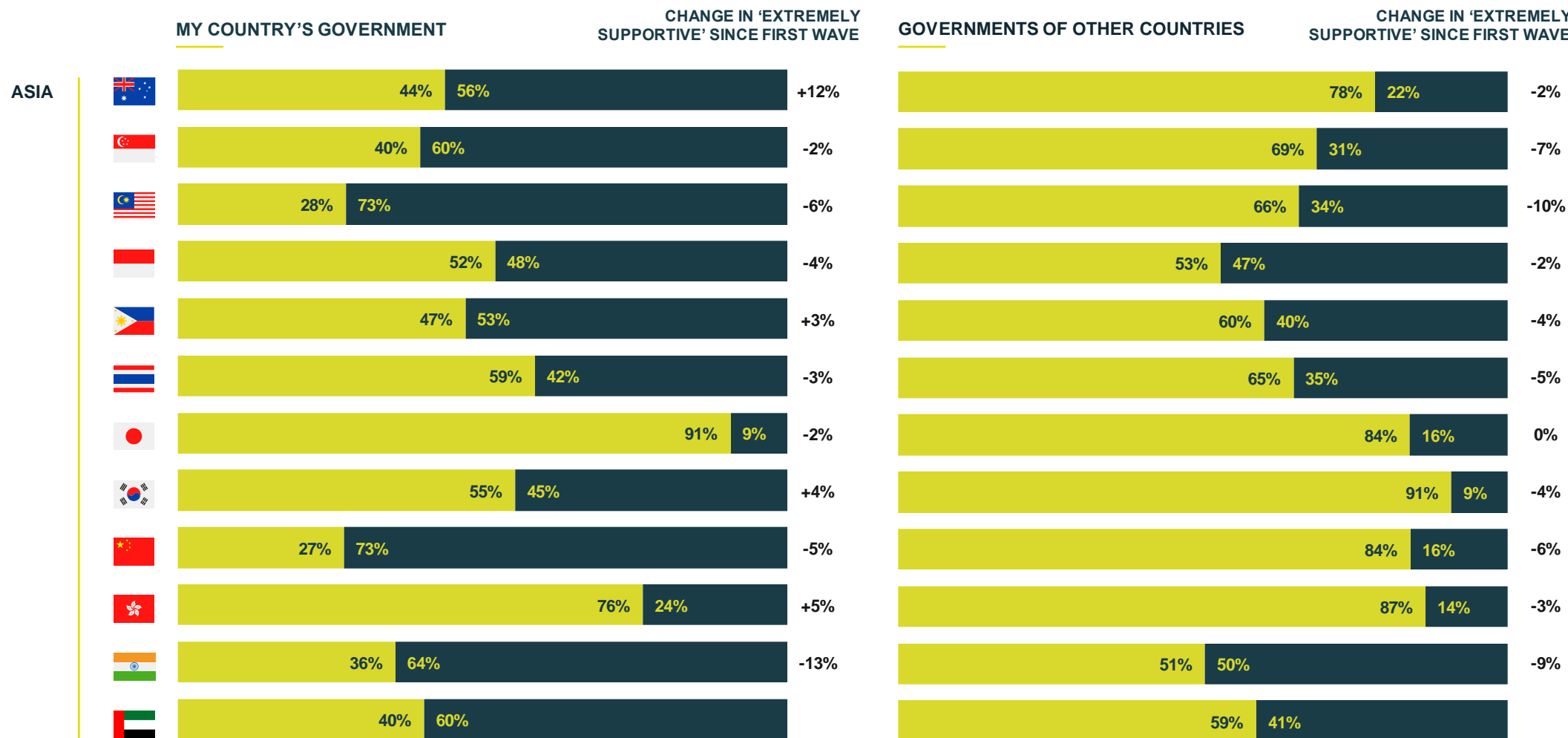
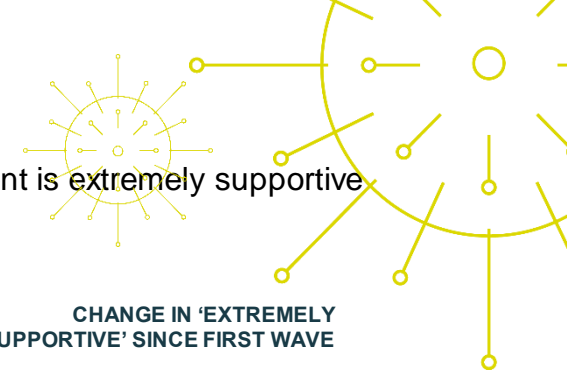
APAC customers are less worried than they used to be regarding essential supplies, but also about getting ill or even about the effects on wider society



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

Level of support given in response to the Coronavirus outbreak

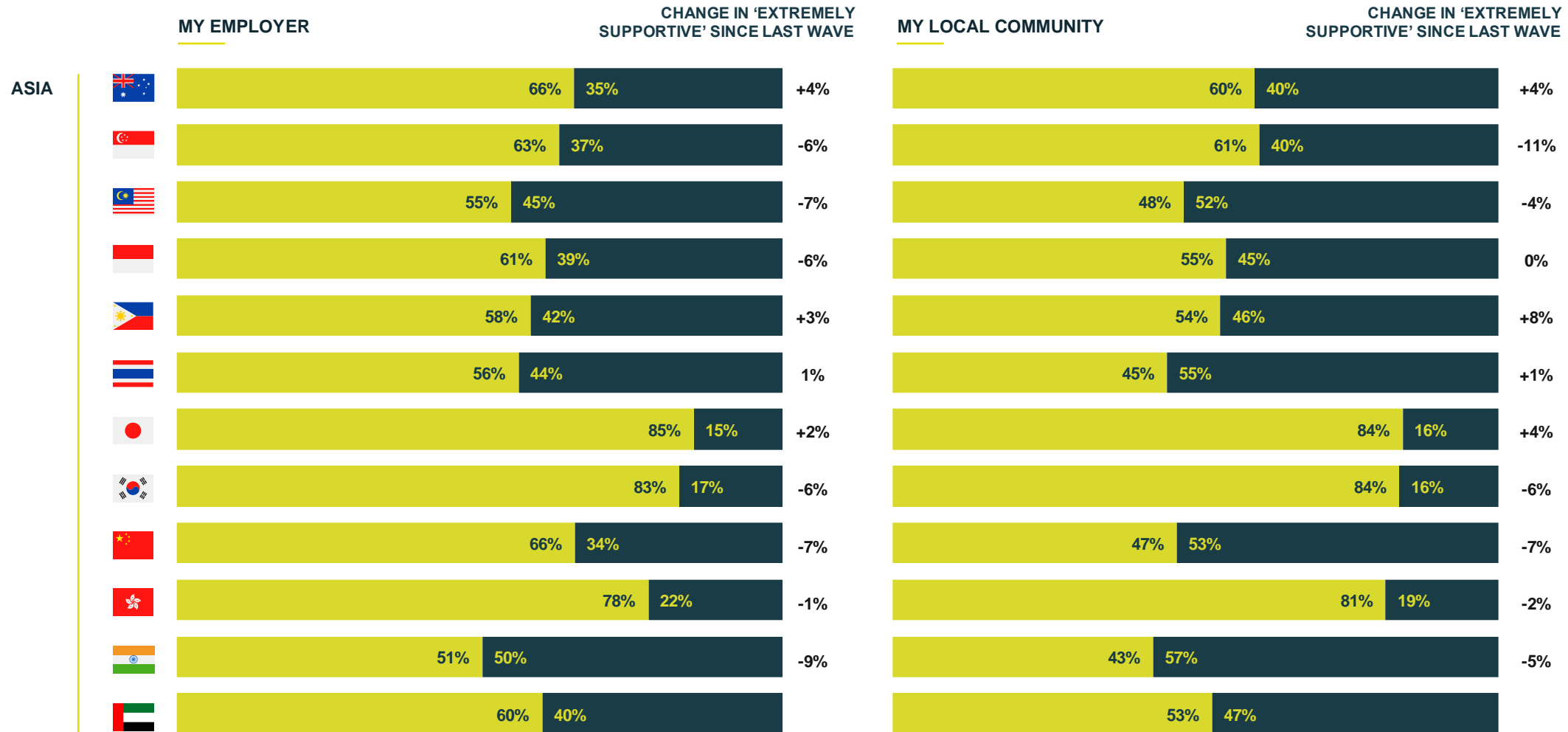
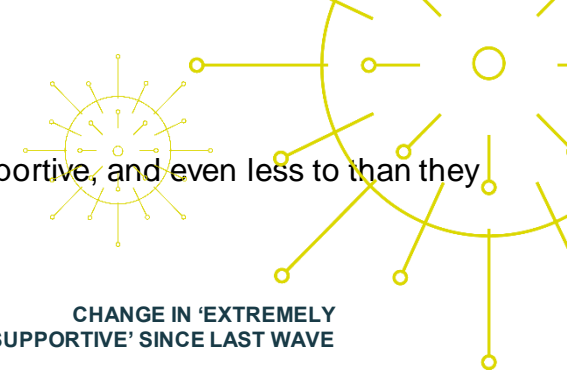
Citizens are more critical of their own governments in Japan, whereas people from India are a less convinced now that their government is extremely supportive



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

Level of support given in response to the Coronavirus outbreak

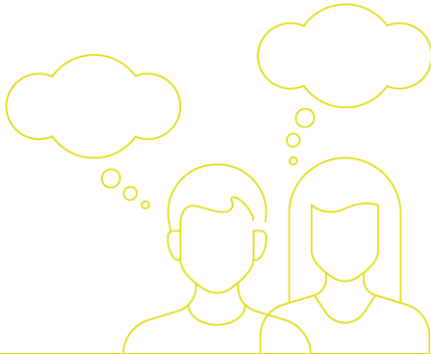
People from Japan, Korea and Hong-Kong are less prone to believe that their employer or their community has been extremely supportive, and even less to than they were at the beginning of the crisis



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

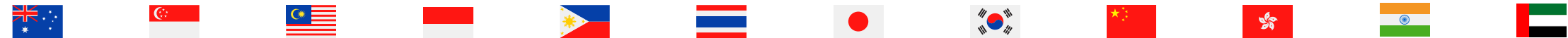
Perceived level of security in employment over the past 2 weeks

The overall level of worry regarding employment is often higher in APAC countries than in the rest of the world

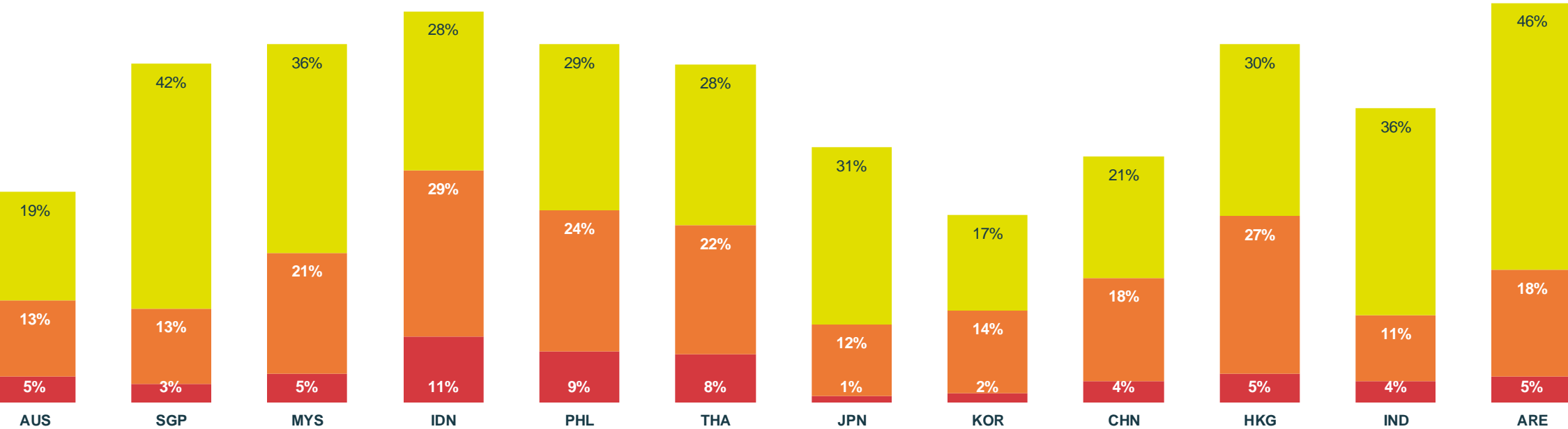


ASIA

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



-3% 6% 9% 3% 4% -10% 2% -6% -1% 3% 6%



■ Have had their employment terminated since the coronavirus ■ Have had their employment reduced since the coronavirus ■ Feel worried

Coronavirus restrictions knock-on effects

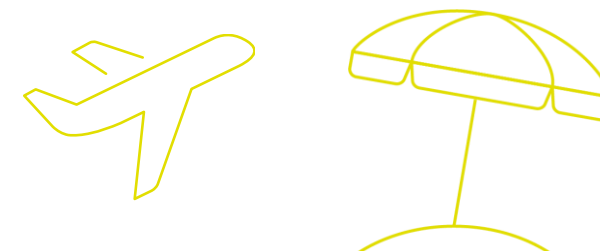
In almost all APAC countries, unhealthy behaviours are more common now than they were at the beginning of the crisis



		EATING LESS HEALTHY	Difference from first wave	DRINKING MORE ALCOHOL	Difference from first wave	SMOKING MORE CIGARETTES	Difference from first wave	TAKING LESS EXERCISE	Difference from first wave	FEEL MORE STRESSED	Difference from first wave	LESS CONCERNED WITH ENVIRONMENTAL ISSUES	Difference from first wave
ASIA		23%	+4%	15%	+4%	11%	+2%	30%	-3%	40%	-11%	13%	+2%
		24%	+6%	12%	0%	9%	+2%	36%	+7%	50%	+1%	18%	+2%
		29%	+7%	3%	+2%	8%	+1%	54%	+3%	38%	-6%	14%	+3%
		17%	+6%	3%	+1%	16%	+7%	33%	+7%	38%	+3%	11%	0%
		36%	+3%	2%	-1%	5%	-1%	40%	+5%	53%	0%	10%	-3%
		16%	+2%	8%	+1%	11%	+5%	34%	+6%	58%	-8%	26%	+4%
		18%	+8%	16%	+9%	9%	+4%	54%	+18%	49%	+3%	8%	+1%
		17%	+3%	11%	-1%	8%	0%	36%	-1%	48%	-6%	8%	+1%
		12%	+2%	9%	+1%	7%	0%	43%	-3%	39%	-2%	9%	-2%
		19%	+4%	7%	+2%	5%	+2%	33%	+1%	45%	-7%	15%	-1%
		25%	-2%	10%	0%	11%	0%	34%	+3%	54%	+2%	24%	-1%
		26%		9%		11%		43%		57%		17%	

Activities likely to undertake once the Coronavirus crisis is over

In relatively small countries like Singapore and Hong-Kong, the will to go on a holiday abroad is stronger. Whereas Thais and Koreans are more likely to go on holiday in their own country.



ASIA

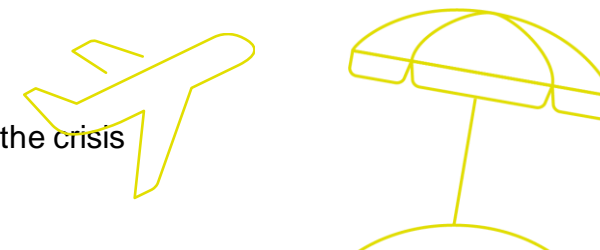
		Treat myself and family to a holiday abroad	Difference from first wave	Treat myself and family to a holiday in my country	Difference from first wave	Buy something of significant value	Difference from first wave	Spend more money generally	Difference from first wave	Go out more, such as to eat or the cinema	Difference from first wave
		22%	+3%	32%	+8%	12%	+1%	14%	-2%	38%	+8%
		34%	-1%	25%	+1%	22%	+2%	18%	0%	41%	+8%
		9%	+1%	24%	+3%	28%	+8%	8%	-2%	13%	-1%
		15%	+4%	26%	+7%	24%	+6%	12%	+1%	17%	+4%
		11%	-3%	23%	-2%	38%	+3%	4%	0%	12%	-4%
		19%	+4%	41%	+8%	24%	+5%	15%	+4%	32%	+5%
		12%	+3%	27%	+6%	9%	+4%	15%	+3%	38%	+9%
		29%	+2%	46%	+7%	3%	+1%	8%	-1%	39%	+1%
		13%	+1%	33%	+4%	6%	0%	22%	+1%	21%	+4%
		40%	+6%	22%	+5%	4%	+1%	23%	-3%	25%	+3%
		23%	+2%	37%	+5%	38%	+8%	26%	+1%	27%	+1%
		32%		37%		27%		16%		29%	

Lowest scoring country for each measure

Highest scoring country for each measure

Activities likely to undertake once the Coronavirus crisis is over

Consumers from APAC countries show more intent to improve various aspects of their behaviour than they did at the start of the crisis



ASIA

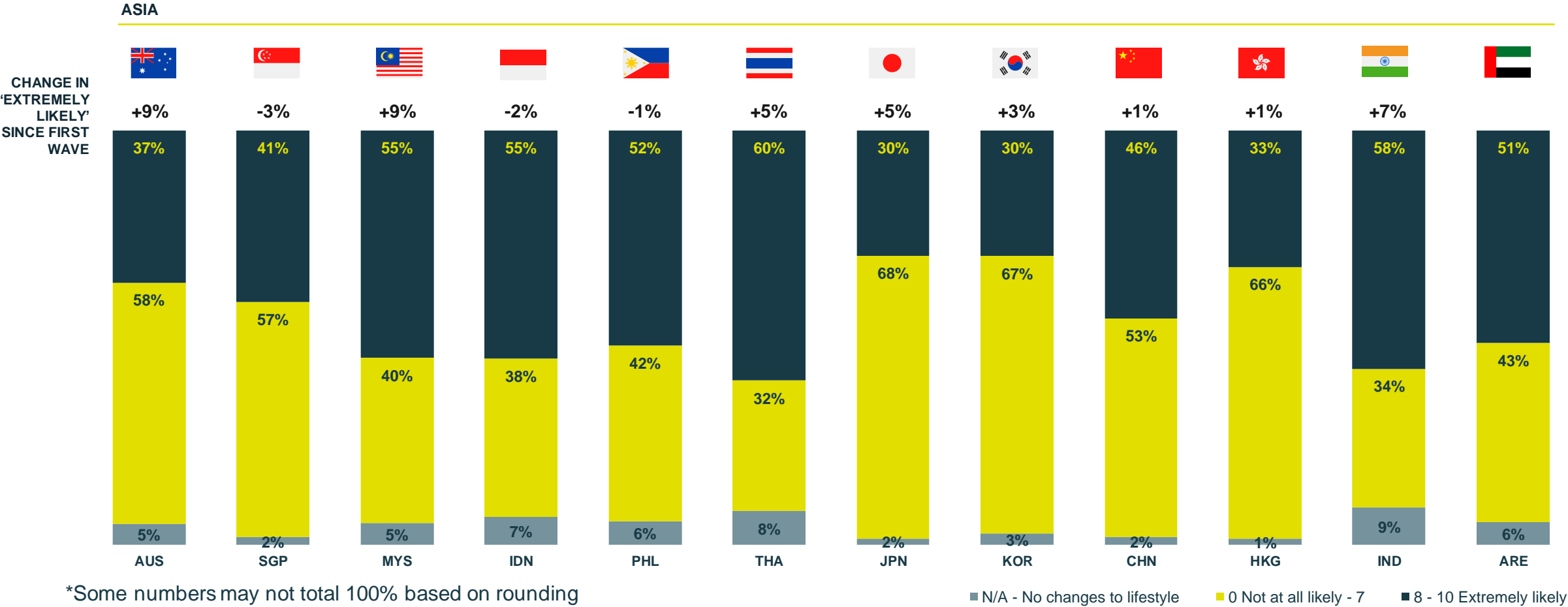
		Be less materialistic	Difference from first wave	Be more optimistic about the future	Difference from first wave	Be more health conscious	Difference from first wave	Be more environmentally conscious	Difference from first wave	Save money to prepare for a rainy day	Difference from first wave	Take out insurance to cover illness/ loss of holidays/ etc.	Difference from first wave
		21%	+3%	33%	-1%	39%	0%	23%	+2%	37%	+3%	8%	+1%
		26%	+7%	38%	-5%	61%	+3%	34%	-7%	58%	+13%	18%	-3%
		28%	+5%	54%	+4%	80%	+4%	56%	+4%	77%	+9%	31%	+4%
		41%	+3%	56%	+8%	83%	+7%	65%	+2%	64%	+11%	24%	+6%
		51%	+9%	67%	+1%	87%	+6%	73%	+11%	83%	+10%	51%	+12%
		33%	+7%	40%	+4%	75%	+1%	50%	0%	66%	+3%	36%	+1%
		15%	+5%	10%	-5%	50%	+4%	20%	-2%	30%	+7%	8%	+3%
		14%	+3%	16%	0%	61%	+4%	37%	+6%	35%	+2%	12%	+2%
		19%	+4%	28%	-5%	81%	+1%	59%	0%	52%	+10%	37%	+1%
		32%	0%	11%	-1%	62%	-4%	35%	-3%	53%	+5%	11%	+2%
		28%	+7%	57%	+5%	68%	+4%	60%	+3%	46%	+11%	33%	+3%
		33%		51%		65%		47%		51%		26%	

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?

All over the APAC countries, people believe that their lifestyle will be impacted for good by the crisis – more so than in European countries





Media & Entertainment

Media & Entertainment Executive Summary

This Wave 4 report looks at activity in the last 2 weeks in our fortnightly barometer.

As the pandemic is now at various stages across different parts of the world, the government measures on lockdown and social distancing also vary. These have also brought about **changes to the pattern of adoption** of home-based online media and entertainment vs. the previous fortnightly waves.

Online news sites have still been the priority for keeping up-to-date on the development of the pandemic globally – net growth is over 60% across Southeast Asia. However, the increase in the volume of activity has slowed down, especially in markets that are beginning to come out from lockdown (e.g. Germany, Italy, Spain, China etc.) compared to activity levels when the crisis first started.

Broadcast TV remains the key channel for video content across markets, although the growth have also slowed down in selected European (Germany, Italy, Spain) and Asian (Thailand, China and India) markets. Gain in usage of an **online streaming service** is also trailing in Spain and China vs. two months ago, yet activity has sped up in other markets like Brazil, Australia and Japan – these may be indications of the “new normal” media usage behaviour in those markets.

Facebook continues to dominate social media activity across various markets. There is also net usage growth for **YouTube** across markets and growth of 10+ percentage points in Australia, Singapore and Japan. Other social media channels also surge in usage – **TikTok**, for instance, is used by 63% in Thailand, which is 14 percentage points up from Wave 1.

Remote communications using technology is another new habit. **Video chatting with families and friends** has become increasingly popular across markets (especially the UK, the US, Australia and Singapore), along with **video conferencing with colleagues** which sees sizeable growth in the Americas and Southeast Asia vs. a couple of months ago.

Media & Entertainment Executive Summary, continued

Over the development of the crisis, there have been shifts in the usage of various media channels – some keep on seeing growth in usage, while some start to level off. These provide **advertisers and media buyers** with some early indication of their priorities for media spend. Social channels like Facebook and YouTube remain prominent and continue to see strong growth, while the growth in other in-home channels like TV and radio have started to level off in this current wave. These indicate which of the media channels will sustain levels of usage after various markets return to the “new normal”.

While more time is spent at home, consumers are also engaging in **more DIY and home improvements** – the net gain in volume continues to speed up in markets like Australia, Singapore, Malaysia and Japan, but starts to slow down in Spain and Indonesia probably due to the gradual resumption of out-of-home commercial activities.




















Gaming continues to **grow**, but the trend is again diverse across markets. **Smartphone/tablet games** are still played by many especially in Asia (e.g. 89% of consumers in Thailand have played in past 2 weeks), while the proportion of consumers playing **video games** in the US, Australia and Thailand has also gone up vs. 2 months ago. However, the net gains in gaming have also slowed down across certain European and Asian markets (e.g. Spain, Indonesia, Philippines, China etc.), most likely due to differentiated lockdown policies.

Online gambling continues to see extensive growth in the US, with over 20% growth in various types of activities. Growth in online gambling activities are also observed across other English speaking markets, with an exception of UK online betting which has dipped due to the suspension of major sports events.

Most other measured media and entertainment activities have seen net increases in usage across markets, but some have started to level off. For example, readership of printed newspapers has declined in UK, Italy, Spain and China, while that for printed books in Malaysia has also returned to zero net gain. These give an early preview of the types of media and entertainment habits that will continue in the “new normal” after the coronavirus crisis, and which ones may not.

How has your usage of the following media changed in the past 2 weeks following the ongoing effects of the coronavirus? – **Video/TV**, ANY ACTIVITY in Wave 4 and change from Wave 1

Broadcast TV continues to be the most used channel for video content. Paid subscription services have also surged in the UK and the Americas over the past couple of months.




















	EUROPE					THE AMERICAS		ASIA											
																			
Watching broadcast TV	89%	96%	90%	97%	96%	90%	90%	90%	88%	92%	98%	95%	95%	91%	95%	90%	94%	94%	89%
vs. Wave 1*	-2	+2	-	-	-	+5	-	-1	+2	-2	-	-	-	-	+1	-3	-2	-2	-
Watching a paid subscription video on demand service	65%	48%	51%	58%	74%	72%	82%	65%	67%	59%	64%	71%	64%	45%	47%	70%	45%	88%	80%
vs. Wave 1*	+6	+5	+4	+1	+2	+7	+6	+5	-3	-1	-3	+3	+4	+2	+1	+2	-3	+1	+3
Watching catch up TV using an online streaming service	79%	71%	66%	76%	69%	75%	76%	68%	78%	72%	78%	84%	86%	51%	73%	85%	76%	92%	89%
vs. Wave 1*	+3	+5	+3	-1	-1	+4	+4	+3	-1	-5	+1	+5	+3	+2	-1	-2	+3	-1	+2
Buying/renting TV shows or movies	42%	37%	49%	53%	52%	64%	60%	43%	51%	51%	51%	49%	59%	49%	67%	66%	49%	80%	69%
vs. Wave 1*	-	+5	+5	+4	-1	+6	+3	+2	+2	+5	-6	-	+4	+4	-	+2	-2	-1	+1

*The results for UAE is compared against Wave 2 as we only started tracking this market from Wave 2.

How has your usage of the following media changed in the past 2 weeks following the ongoing effects of the coronavirus? – **Video/TV**, NET GROWTH in Wave 4 and change from Wave 1

Net growth = doing more **minus** doing less




















Whilst growth of broadcast TV is still substantial across many markets, it has slowed down quite a lot in certain countries (e.g. Germany, Italy, Spain, Thailand, China and India) vs. 2 months ago. Adoption of online streaming continues to speed up in Brazil, Australia and Japan, but this has decelerated in Spain and China where lockdown has started to ease.

	EUROPE					THE AMERICAS		ASIA											
																			
Watching broadcast TV	33%	47%	27%	51%	40%	43%	39%	30%	52%	62%	61%	50%	57%	36%	50%	30%	44%	56%	44%
vs. Wave 1*	-6	-2	-11	-15	-13	-	-5	-8	+4	+4	-7	-9	-11	+4	-4	-16	-	-13	-8
Watching a paid subscription video on demand service	29%	20%	17%	21%	33%	38%	50%	27%	40%	33%	28%	29%	32%	20%	17%	23%	9%	54%	39%
vs. Wave 1*	+4	+2	+1	-2	-4	+3	+7	+7	+3	+1	-5	+4	+7	+7	+4	-3	-7	+3	-
Watching catch up TV using an online streaming service	31%	28%	21%	36%	23%	40%	46%	28%	44%	39%	30%	38%	49%	23%	32%	33%	34%	53%	49%
vs. Wave 1*	+4	+3	-1	-5	-11	+2	+12	+8	+5	-7	-5	-1	+3	+9	+1	-11	-	-7	-
Buying/renting TV shows or movies	13%	13%	12%	16%	16%	32%	25%	10%	20%	17%	11%	0%	13%	10%	21%	13%	11%	38%	26%
vs. Wave 1*	+2	+4	+1	-1	-8	+6	-	+1	+2	+7	-9	-12	-3	+2	-	-4	-2	-2	-3

*The results for UAE is compared against Wave 2 as we only started tracking this market from Wave 2.

How has your usage of the following media changed in the past 2 weeks following the ongoing effects of the coronavirus? – **Reading**, ANY ACTIVITY in Wave 4 and change from Wave 1

Online news stays very high across various markets. Readership of printed newspapers and eBooks/audiobooks have grown over the last couple of months, yet these have gone down in certain Asian markets like Hong Kong and Korea.




















	EUROPE					THE AMERICAS		ASIA											
																			
Reading printed books	73%	78%	79%	85%	83%	79%	83%	71%	73%	67%	73%	70%	74%	71%	65%	86%	70%	91%	82%
vs. Wave 1*	-3	+5	-	+1	+1	+5	+2	-	-	-	-3	-	+5	+1	-1	+3	-3	+1	-
Reading eBooks	44%	34%	45%	51%	61%	61%	66%	45%	62%	57%	66%	59%	77%	45%	46%	82%	50%	85%	78%
vs. Wave 1*	-	+5	+3	-1	-1	+8	+1	+4	+1	+5	-2	+1	+1	+2	-4	-2	-4	-1	-1
Listening to audiobooks	30%	27%	41%	36%	39%	53%	42%	33%	54%	40%	48%	45%	52%	30%	32%	71%	33%	75%	69%
vs. Wave 1*	-	+3	+2	-3	-2	+8	-2	+3	+2	+2	-5	-3	+4	-1	-5	+1	-5	-1	-
Listening to podcasts	38%	41%	44%	44%	56%	56%	60%	45%	61%	62%	61%	59%	62%	28%	42%	61%	39%	77%	70%
vs. Wave 1*	+1	+7	+4	-3	-2	+5	-2	+4	+3	-	-4	-	+2	-1	-2	-1	-3	-2	-2
Listening to broadcast radio	74%	82%	88%	88%	86%	79%	80%	73%	80%	81%	69%	77%	70%	57%	62%	71%	65%	81%	82%
vs. Wave 1*	-	+2	+1	-1	+1	+6	+2	-2	+5	+2	+1	-4	-1	-	-3	+1	-3	-	+3
Reading printed newspapers	57%	61%	72%	74%	66%	70%	51%	60%	73%	55%	67%	66%	66%	61%	53%	72%	70%	91%	73%
vs. Wave 1*	-1	+5	-	+2	-	+8	-1	+1	-5	-7	+4	-5	+1	-2	-	+5	-6	-1	+2
Reading online news sites	81%	83%	86%	97%	95%	84%	95%	80%	95%	92%	98%	97%	96%	89%	91%	98%	94%	96%	97%
vs. Wave 1*	-3	+5	-	+1	-	+3	+1	-3	-1	+1	+3	-	-2	+2	-	+2	-2	-	+1

*The results for UAE is compared against Wave 2 as we only started tracking this market from Wave 2.

How has your usage of the following media changed in the past 2 weeks following the ongoing effects of the coronavirus? – **Reading**, NET GROWTH in Wave 4 and change from Wave 1

Net growth = doing more **minus** doing less

Net growth remains most significant for online news sites, although these have slowed down in those markets coming out from lockdown (e.g. Germany, Italy, Spain, China etc.). The increase in readership and listening of various channels have also continued to grow in the US, while these have calmed down in certain markets (esp. Spain, Philippines, China and UAE).




















	EUROPE					THE AMERICAS		ASIA											
																			
Reading printed books	19%	21%	19%	21%	18%	32%	21%	14%	24%	0%	7%	1%	3%	12%	6%	14%	10%	41%	21%
vs. Wave 1*	-2	-	-1	-12	-12	+5	-7	+1	+5	-17	-11	-11	-6	+3	-5	-7	+2	-3	-3
Reading eBooks	12%	11%	11%	15%	18%	28%	26%	13%	30%	15%	21%	1%	32%	13%	10%	29%	14%	46%	26%
vs. Wave 1*	+1	+2	-	-3	-6	+4	-3	+4	+8	-4	-5	-10	-10	+2	+1	-11	-1	+4	-6
Listening to audiobooks	7%	7%	9%	7%	8%	29%	17%	9%	22%	8%	7%	1%	16%	7%	5%	22%	6%	34%	23%
vs. Wave 1*	-1	-1	+1	-2	-5	+8	-	+3	-	+1	-6	-5	+2	+2	+1	-6	-5	-5	-4
Listening to podcasts	10%	11%	9%	10%	13%	32%	27%	16%	28%	20%	20%	5%	23%	7%	9%	10%	6%	35%	25%
vs. Wave 1*	-1	+4	-2	-2	-5	+8	+3	+7	+3	+1	-1	-13	+4	+2	+1	-10	-3	-7	-5
Listening to broadcast radio	11%	7%	14%	15%	18%	25%	21%	13%	34%	15%	15%	14%	16%	9%	12%	10%	17%	33%	20%
vs. Wave 1*	-3	-	-8	-1	-8	+4	-3	+1	+2	+5	-1	-24	-13	-2	-4	-11	-2	-8	-10
Reading printed newspapers	-1%	1%	8%	-4%	-15%	24%	2%	3%	21%	0%	3%	5%	4%	10%	3%	-7%	6%	29%	11%
vs. Wave 1*	-4	+1	-1	+1	-8	+3	-4	-1	-6	-6	-14	-16	-10	-	-9	-3	+3	-10	-7
Reading online news sites	32%	34%	29%	52%	47%	44%	60%	32%	64%	61%	70%	61%	69%	45%	48%	58%	49%	65%	55%
vs. Wave 1*	-10	-1	-12	-15	-15	+1	-4	-11	-7	+1	+3	-6	-6	+4	-9	-13	-8	-7	-16

*The results for UAE is compared against Wave 2 as we only started tracking this market from Wave 2.

How has your usage of the following media changed in the past 2 weeks following the ongoing effects of the coronavirus? – **Gaming/DIY**, ANY ACTIVITY in Wave 4 and change from Wave 1

Smartphone/tablet games are still most popular, while there is also a surge of video games in US, Australia and Thailand (and Hong Kong for PC games) over the last 2 months.

Engagement in home improvements/DIY projects have also been high across regions, with strong growth in the US, Australia, Malaysia and Japan in particular.

	EUROPE					THE AMERICAS		ASIA											
																			
Playing video games on a smartphone/tablet	49%	54%	52%	66%	68%	65%	74%	53%	77%	81%	78%	85%	89%	55%	68%	83%	80%	91%	85%
vs. Wave 1*	+1	+3	+2	+1	-	+3	+6	+7	+2	+8	-4	-	+5	+3	+1	-3	-	+1	+3
Playing video games on a PC	37%	48%	46%	55%	60%	62%	60%	45%	60%	52%	65%	70%	70%	42%	53%	76%	63%	81%	71%
vs. Wave 1*	-1	+3	-1	-	-	+9	+6	+5	-1	+3	-2	-1	+8	+3	+1	-4	+7	-	+1
Playing video games on a console	39%	44%	40%	47%	57%	56%	55%	43%	55%	47%	54%	57%	63%	41%	37%	63%	54%	75%	70%
vs. Wave 1*	+1	+4	+3	-3	+2	+7	+5	+6	-3	+2	-1	-1	+7	+3	-	-1	-	-1	+1
Making home improvements/DIY	72%	70%	59%	79%	75%	76%	86%	71%	76%	77%	76%	82%	90%	48%	71%	73%	47%	90%	88%
vs. Wave 1*	-1	+1	+4	+1	-1	+9	-1	+7	+1	+10	-4	-	+4	+7	+1	+5	+4	+1	-




















*The results for UAE is compared against Wave 2 as we only started tracking this market from Wave 2.

How has your usage of the following media changed in the past 2 weeks following the ongoing effects of the coronavirus? – **Gaming/DIY**, NET GROWTH in Wave 4 and change from Wave 1

Net growth = doing more **minus** doing less

Growth in smartphone/tablet games is still more significant in Asia, with gains being much quicker in Singapore, Malaysia and Thailand vs. 2 months ago. However, the growth in gaming has slowed down in certain markets coming out from lockdown, e.g. Spain and China.




















The growth of DIY projects stay high in Brazil, Thailand and India, while it has been larger in Australia and some other Asian markets. However, it is not growing as much in Spain and Indonesia vs. 2 months ago.

	EUROPE					THE AMERICAS		ASIA											
																			
Playing video games on a smartphone/tablet	20%	21%	16%	27%	26%	35%	40%	21%	44%	50%	43%	39%	52%	23%	28%	33%	34%	53%	44%
vs. Wave 1*	+2	-1	-1	-1	-10	+4	+1	+9	+10	+13	+1	-3	+9	+9	+4	-13	-2	+3	-4
Playing video games on a PC	12%	18%	13%	16%	20%	35%	27%	15%	29%	19%	17%	14%	24%	13%	16%	29%	17%	41%	31%
vs. Wave 1*	-1	-	-	-7	-10	+11	+4	+5	+5	-	-7	-6	+4	+5	+1	-7	-7	+2	-6
Playing video games on a console	14%	19%	13%	15%	21%	34%	26%	15%	28%	21%	23%	9%	20%	18%	10%	22%	17%	37%	29%
vs. Wave 1*	+1	+2	+1	-4	-8	+9	+2	+6	-	+3	+4	-6	+4	+8	-	-2	-6	-5	-5
Making home improvements/DIY	27%	24%	14%	26%	20%	31%	43%	23%	36%	31%	29%	29%	46%	14%	16%	20%	9%	49%	34%
vs. Wave 1*	+3	-1	-2	-	-11	+2	-2	+10	+7	+6	-10	-1	-3	+8	+4	-4	-2	-4	-17

*The results for UAE is compared against Wave 2 as we only started tracking this market from Wave 2.

How has your usage of the following media changed in the past 2 weeks following the ongoing effects of the coronavirus? – **Social Media**, ANY ACTIVITY in Wave 4 and change from Wave 1

Facebook and YouTube remain the most prominent social media channels across regions. Amongst other social media channels, Twitter and Instagram have seen higher adoption in the US, Indonesia and Japan in particular vs. a couple of months ago, while TikTok has also gone up in the US, Brazil, Australia and Thailand.

	EUROPE					THE AMERICAS		ASIA											
																			
Using Facebook	73%	77%	66%	83%	85%	84%	91%	79%	92%	93%	93%	98%	99%	49%	64%	N/A	95%	95%	95%
vs. Wave 1*	+1	-	+2	+1	+1	+4	+1	+1	-	-	+1	-	+2	+4	-2	N/A	-	-1	-
Using Twitter	43%	35%	33%	42%	57%	57%	58%	37%	58%	50%	76%	67%	74%	60%	43%	N/A	43%	83%	77%
vs. Wave 1*	+4	+3	+3	-2	-1	+8	+3	+4	-3	+1	+9	-	+6	+7	-	N/A	+3	-	+2
Using Instagram	45%	43%	45%	65%	65%	60%	85%	49%	73%	74%	88%	75%	78%	48%	63%	N/A	67%	89%	90%
vs. Wave 1*	+2	+4	+3	+2	-2	+7	-	+4	-4	+3	+3	+3	-	+7	+2	N/A	+1	-	+4
Using TikTok	23%	22%	25%	26%	32%	45%	50%	28%	44%	27%	42%	44%	63%	22%	26%	81%	28%	63%	64%
vs. Wave 1*	+2	+3	+4	+1	+3	+7	+9	+7	-	+3	+2	+1	+14	+1	-3	-5	+3	-5	+5
Social site excl. Facebook, Twitter, Instagram & TikTok	53%	53%	55%	64%	68%	64%	80%	53%	79%	86%	87%	87%	88%	54%	56%	70%	81%	93%	89%
vs. Wave 1*	+3	+5	+5	+4	+1	+5	+7	+1	-4	-	-2	+1	+2	+5	-1	-	+3	-	+1
Watching videos on YouTube	75%	76%	79%	91%	93%	79%	98%	77%	96%	97%	99%	99%	98%	84%	88%	N/A	94%	99%	99%
vs. Wave 1*	+3	+5	+5	-	-	+5	+3	+5	-	+3	+4	-	+1	+6	-2	N/A	+1	-	-1

*The results for UAE is compared against Wave 2 as we only started tracking this market from Wave 2.

How has your usage of the following media changed in the past 2 weeks following the ongoing effects of the coronavirus? – **Social Media**, NET GROWTH in Wave 4 and change from Wave 1

Net growth = doing more **minus** doing less




















Growth in Facebook and YouTube are still the largest across most markets, with the growth of the latter having increased most in Japan, Singapore and Australia. The growth of TikTok has also expanded in Thailand vs. 2 months ago, while this has trailed down in China (where TikTok dominates).

	EUROPE					THE AMERICAS		ASIA											
Using Facebook	27%	32%	19%	40%	36%	38%	53%	28%	55%	63%	48%	71%	72%	7%	12%	N/A	41%	60%	58%
vs. Wave 1*	-1	+2	-2	-2	-6	+4	+8	+5	+9	+4	+1	+4	+4	-	+1	N/A	-7	-2	-
Using Twitter	12%	12%	9%	8%	19%	31%	26%	13%	29%	20%	23%	22%	30%	19%	6%	N/A	13%	40%	33%
vs. Wave 1*	-	+1	+2	-5	-5	+7	+2	+4	+3	+4	-3	+2	-2	+4	-	N/A	+2	-5	+3
Using Instagram	15%	19%	16%	24%	27%	33%	49%	19%	44%	40%	41%	30%	37%	12%	17%	N/A	26%	52%	47%
vs. Wave 1*	-3	+5	-	-2	-7	+5	-	+5	+9	+9	+1	+2	-	+5	+1	N/A	-	+1	-3
Using TikTok	9%	11%	9%	10%	12%	26%	27%	11%	23%	11%	13%	10%	32%	5%	4%	43%	5%	34%	30%
vs. Wave 1*	+1	+4	+1	+3	+2	+4	+2	+4	+6	+5	+1	-6	+15	+1	-1	-11	-	-2	-
Social site excl. Facebook, Twitter, Instagram & TikTok	22%	22%	17%	28%	27%	34%	43%	21%	46%	58%	50%	52%	57%	14%	13%	25%	36%	61%	52%
vs. Wave 1*	-2	+2	-1	-2	-6	+3	+5	+4	+5	+8	-	+4	-	+4	+2	-10	-	-2	-6
Watching videos on YouTube	25%	28%	22%	40%	43%	38%	66%	32%	65%	67%	70%	71%	78%	38%	48%	N/A	55%	73%	61%
vs. Wave 1*	+1	+6	-2	-3	-7	+2	+6	+10	+13	+4	+8	+4	+6	+17	+2	N/A	+2	+1	-10

*The results for UAE is compared against Wave 2 as we only started tracking this market from Wave 2.

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

Video chatting with family and friends stays as the most popular, while this records a growth of 10 percentage points or more in the UK, USA, Australia, Singapore and Japan. Meanwhile, video conferencing also sees a surge in the Americas and Southeast Asia (esp. Singapore and Malaysia) vs. 2 months ago.

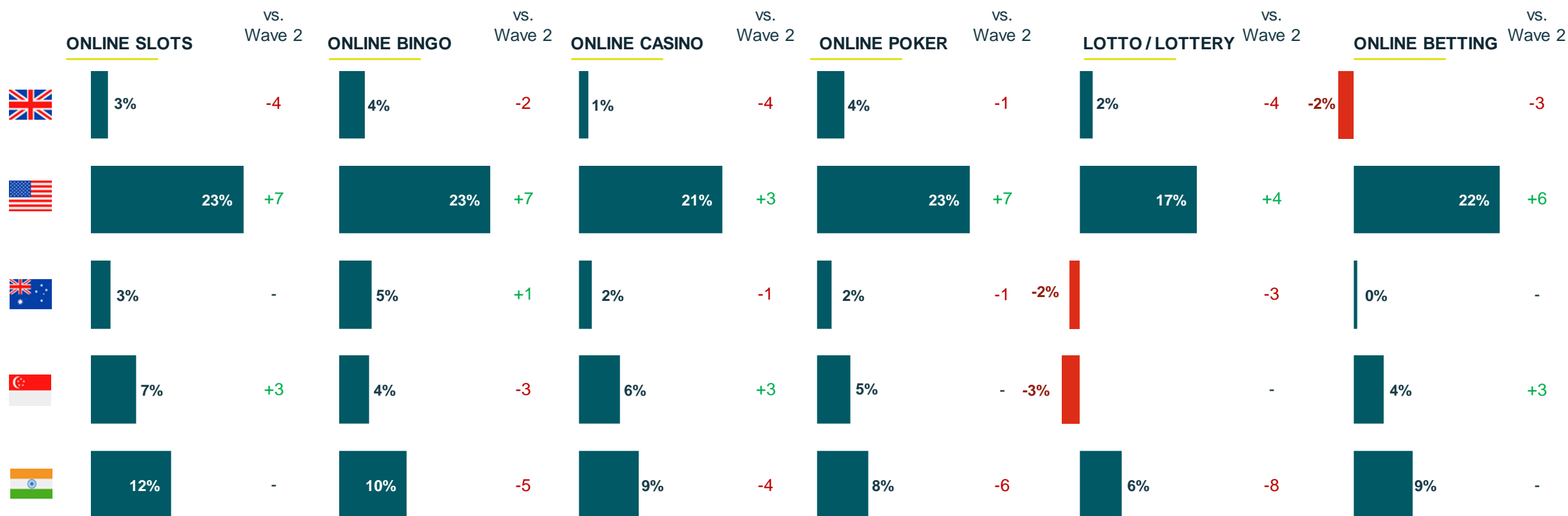
	EUROPE					THE AMERICAS		ASIA											
																			
Video chatting with friends/family	56%	56%	39%	76%	77%	52%	74%	54%	65%	70%	81%	83%	74%	26%	26%	75%	30%	86%	78%
vs. Wave 1*	+14	+8	+2	+5	+5	+10	+6	+20	+17	+2	+6	+5	+4	+12	+5	+3	-6	+9	-3
Video conferencing with colleagues	22%	19%	20%	30%	42%	38%	48%	26%	52%	36%	47%	46%	44%	16%	16%	47%	28%	66%	57%
vs. Wave 1*	+5	+6	+5	+7	+7	+11	+11	+9	+13	+12	+7	+6	+5	+5	+1	-2	-	+8	+3
Online learning excl. school/college	14%	8%	10%	14%	17%	23%	43%	16%	29%	21%	27%	28%	39%	6%	13%	13%	9%	50%	42%
vs. Wave 1*	+4	+2	+1	+3	+4	+5	+5	+7	+2	+6	+2	+5	+3	+1	-	-4	-	+7	+3
Online learning from school/college	10%	9%	11%	15%	11%	25%	24%	16%	23%	17%	19%	13%	22%	5%	10%	12%	8%	41%	29%
vs. Wave 1*	+1	+1	+2	+4	-1	+8	+2	+5	+3	+4	+2	-	+1	+1	+1	-4	-1	+7	-1
None of these	32%	34%	47%	16%	13%	33%	9%	34%	16%	21%	9%	8%	12%	63%	56%	16%	45%	2%	4%
vs. Wave 1*	-13	-8	-3	-5	-5	-12	-5	-20	-14	-2	-5	-3	-5	-13	-4	+2	+1	-6	-

*The results for UAE is compared against Wave 2 as we only started tracking this market from Wave 2.

If you use online gambling sites, how has your usage of the different types of gambling changed, if at all, during the outbreak of the coronavirus? NET GROWTH in Wave 4 and change from Wave 2

Net growth = started doing plus doing more often **minus** doing less often

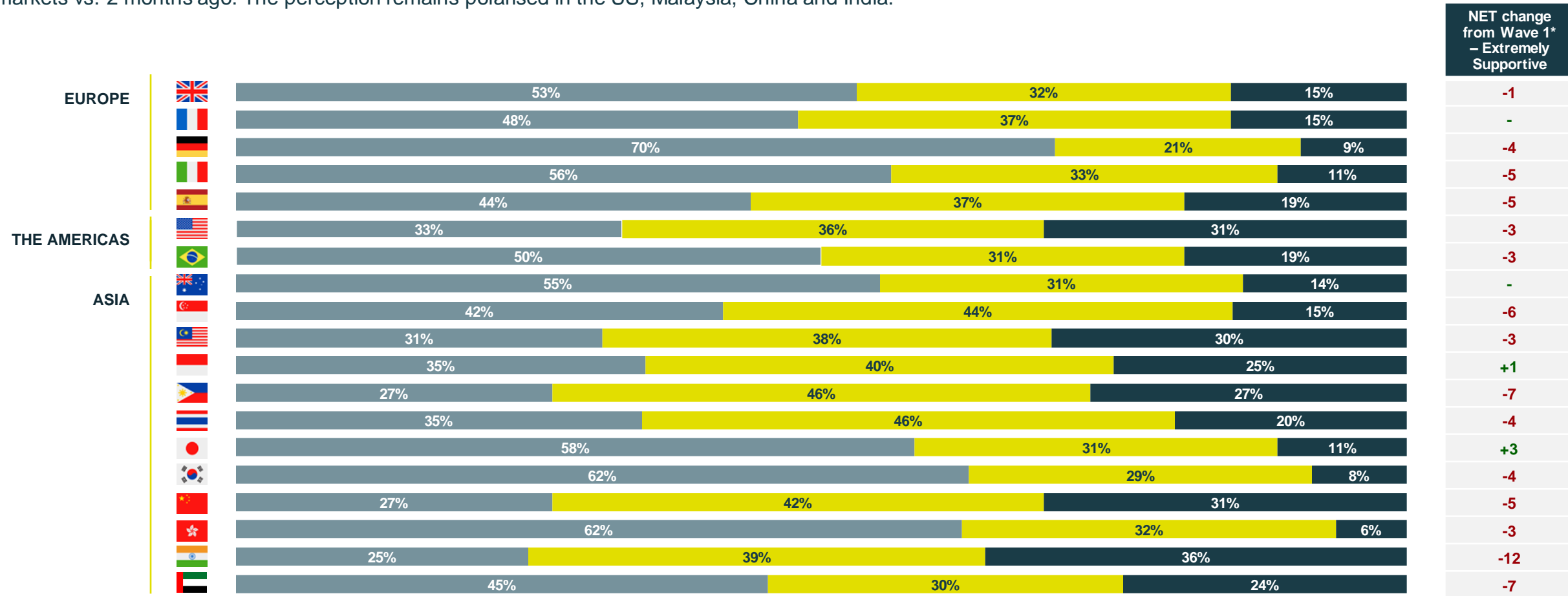
Engagement in various gambling activities continues to see double-digit growth in the US, so does online slots and bingo for India. There is a dip in online betting for the UK vs. a month ago (due to the suspension of sports events), as well as lottery in Australia and Singapore.



Utilities & Service Providers

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

Utilities and service providers are still generally perceived as less supportive across markets, with weakened perception on being “extremely supportive” across most markets vs. 2 months ago. The perception remains polarised in the US, Malaysia, China and India.

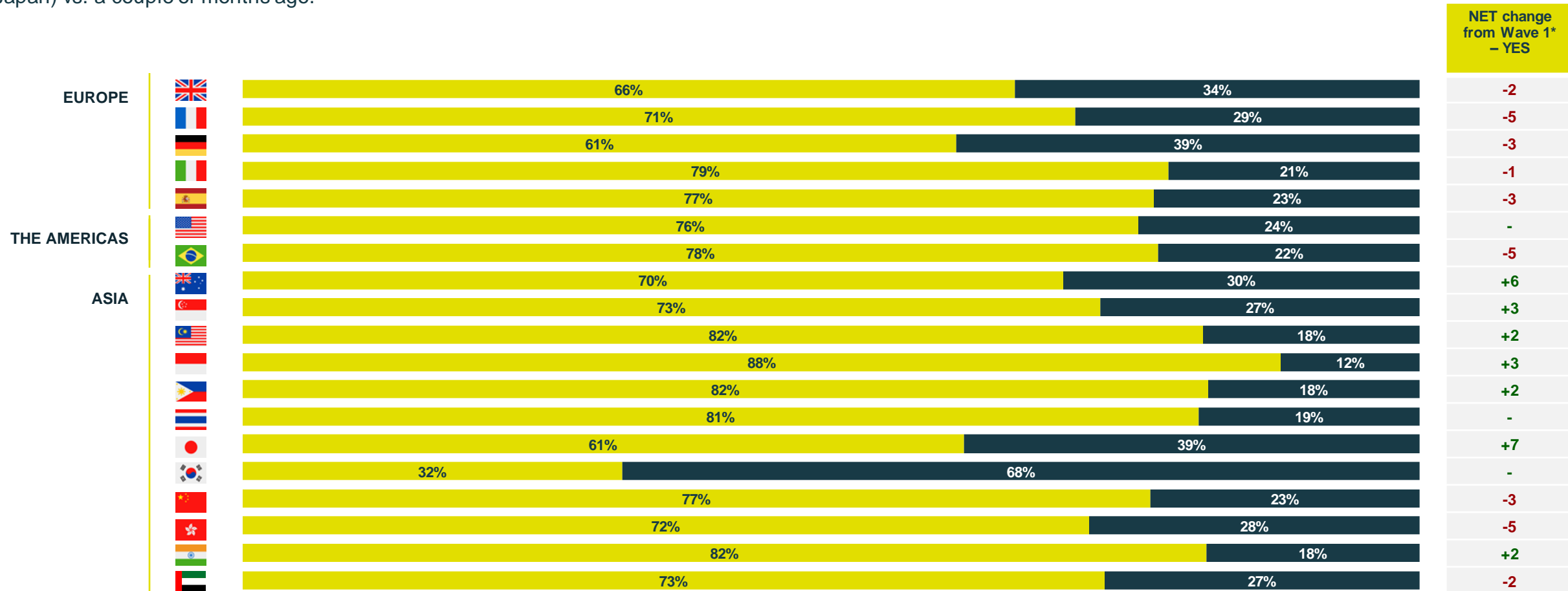


*The results for UAE is compared against Wave 2 as we only started tracking this market from Wave 2.

■ 0 Not supportive at all - 6 ■ 7 - 8 ■ 9 - 10 Extremely Supportive

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

A majority (except in Korea) still sees communications from service providers as sufficient. There is quite an improvement across certain markets (e.g. Australia and Japan) vs. a couple of months ago.




























*The results for UAE is compared against Wave 2 as we only started tracking this market from Wave 2.

■ Yes ■ No

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

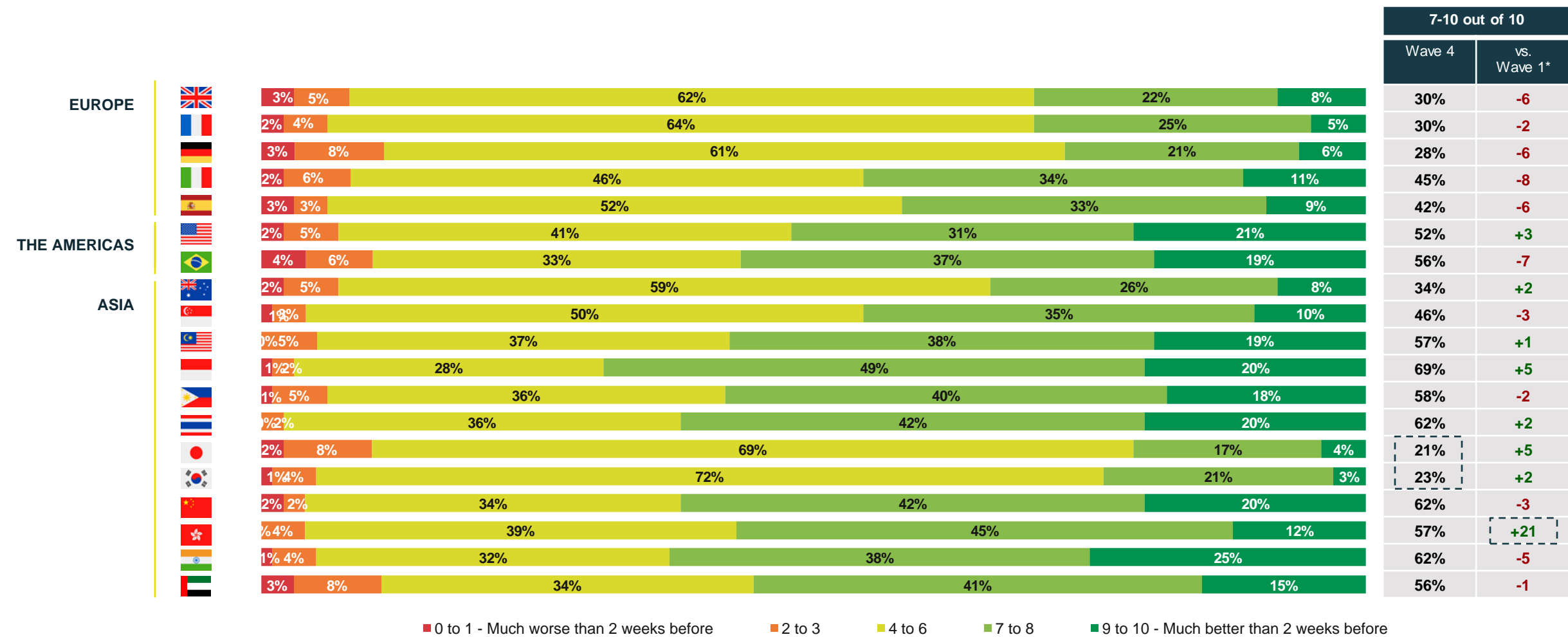
Emails remain as the prominent type of communications across Europe, the US and Australia, while social media stays as important in Southeast Asia. Germany, Japan and Korea are reporting low level of communications from service providers.

		EUROPE					THE AMERICAS		ASIA											
																				
	E-mails	51%	44%	25%	34%	44%	47%	34%	49%	41%	27%	25%	41%	23%	22%	21%	21%	22%	47%	50%
vs. Wave 1*		-7	-7	-9	-3	-1	-8	-3	+5	+1	-	-5	+5	+2	+7	+5	-	-6	+7	-
	Text (SMS)	11%	23%	5%	14%	16%	17%	22%	18%	26%	40%	21%	51%	20%	11%	27%	52%	19%	49%	47%
vs. Wave 1*		-2	+3	-1	+2	-1	+1	-2	+2	+1	-6	-1	+1	+1	+4	+2	-11	-5	-	-3
	Ads on social media	13%	14%	22%	45%	37%	25%	54%	19%	38%	65%	68%	68%	77%	33%	21%	53%	48%	51%	51%
vs. Wave 1*		+2	-5	-7	+1	-1	+3	-4	+5	-	-5	-3	-4	-1	+8	-	-6	-6	-2	-2
	Ads in newspapers	9%	17%	22%	27%	26%	20%	34%	14%	24%	22%	33%	32%	26%	17%	6%	20%	32%	38%	26%
vs. Wave 1*		+2	-	-3	+1	-4	+8	-3	+4	-1	-1	+2	-3	+2	+3	-1	-3	+2	+4	-2
	Letters	8%	8%	7%	4%	6%	16%	3%	9%	14%	4%	7%	6%	6%	8%	3%	11%	9%	13%	11%
vs. Wave 1*		+3	+2	-	-	+1	+2	-1	+5	+2	-1	-1	-2	+1	+3	-	+3	+2	-1	+1
	None	31%	28%	43%	22%	21%	23%	17%	30%	21%	10%	10%	6%	11%	41%	48%	16%	19%	9%	10%
vs. Wave 1*		+2	+3	+8	-	+1	-	+2	-9	-3	-3	-2	-1	+1	-13	-2	+4	-2	-	+2

*The results for UAE is compared against Wave 2 as we only started tracking this market from Wave 2.

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

Communications from service providers are perceived as sufficient in general (except Japan and Korea). There is a strong improvement of 21 percentage points in the perception of communications in Hong Kong vs. two months ago.



*The results for UAE is compared against Wave 2 as we only started tracking this market from Wave 2.

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...

Communications from service providers are most considered as “informative” and “helpful” across most markets. The perception of “informative” has improved in the US and Indonesia, but this has weakened in France and Germany. Communications are also more seen as “reassuring” in Indonesia and Hong Kong, yet “quick to read” has weakened in Germany vs. a couple of months ago.

	EUROPE					THE AMERICAS		ASIA											
Informative	32%	31%	25%	38%	46%	41%	47%	31%	41%	56%	57%	53%	49%	18%	15%	38%	16%	43%	41%
vs. Wave 1*	+1	-7	-8	-2	+1	+7	+1	-	-	-	+6	+3	+4	+1	+3	-4	+2	-2	+2
Helpful	23%	29%	20%	36%	34%	33%	45%	26%	35%	51%	52%	53%	60%	29%	24%	40%	42%	49%	43%
vs. Wave 1*	-1	-3	-5	-2	-2	+2	-2	+2	-	-2	+5	+6	+2	+5	+3	-4	+1	-3	-1
Reassuring	21%	13%	11%	16%	15%	21%	13%	19%	25%	26%	32%	29%	30%	9%	11%	32%	19%	24%	22%
vs. Wave 1*	-	-	-1	-1	+2	-3	-1	-	+1	+2	+8	+2	+3	+2	+1	-1	+7	+4	-1
Quick to read	16%	13%	26%	13%	16%	21%	13%	19%	24%	30%	13%	20%	22%	8%	11%	33%	16%	31%	27%
vs. Wave 1*	+3	-4	-7	-	-2	-	-	+3	+2	+4	-	-	+3	-1	+3	+4	+2	+2	+1
Timely	14%	11%	27%	15%	25%	20%	20%	15%	24%	36%	22%	35%	31%	16%	16%	32%	26%	34%	25%
vs. Wave 1*	-2	-1	-4	-2	-2	-2	+1	-1	+1	+2	+3	-	-2	+4	+2	+1	-	-	-

*The results for UAE is compared against Wave 2 as we only started tracking this market from Wave 2.

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...

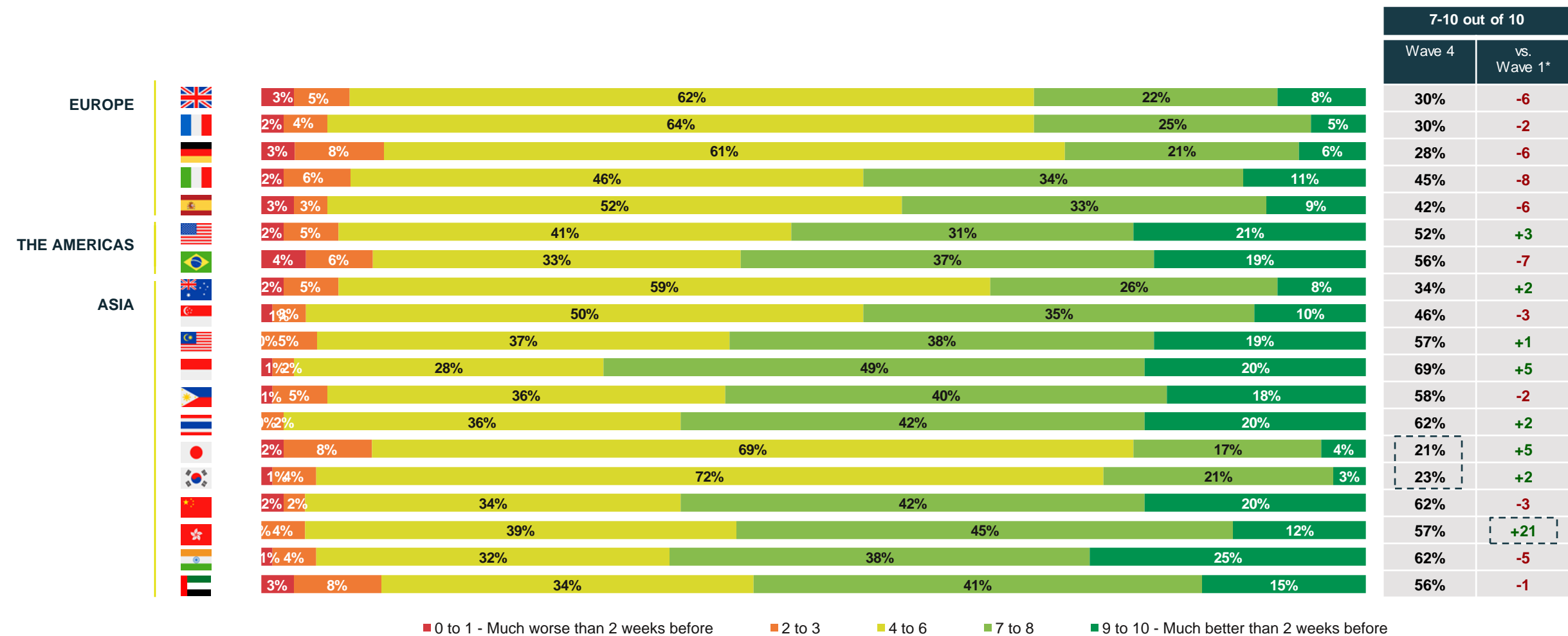
Negative perceptions on communications from service providers remain relatively low across markets, with consumers in Hong Kong less taking the information as “annoying” vs. Wave 1. 35% of those in Korea have no strong feelings about the information from service providers.

	EUROPE					THE AMERICAS		ASIA											
Over-the-top	4%	7%	8%	6%	6%	11%	14%	7%	7%	5%	11%	5%	6%	12%	4%	4%	9%	15%	8%
vs. Wave 1*	-	+3	-1	-1	-2	+3	-4	+1	-1	-3	-	-4	-4	-	-2	-1	+1	-1	-2
Confusing	4%	9%	7%	14%	9%	6%	10%	5%	6%	3%	6%	5%	9%	11%	2%	4%	8%	11%	11%
vs. Wave 1*	-	+1	-	-1	-3	-	-1	-1	-	-2	-3	-5	-6	-3	-7	-1	-4	-2	-1
Irrelevant	9%	6%	5%	9%	11%	11%	6%	10%	6%	4%	4%	3%	3%	8%	10%	4%	5%	11%	7%
vs. Wave 1*	+2	-	-1	+1	+3	+1	+1	+4	-	-1	-1	-2	-	+1	-	-2	-3	-	-2
Annoying	7%	10%	8%	9%	7%	10%	9%	8%	6%	2%	6%	5%	3%	11%	3%	2%	9%	12%	10%
vs. Wave 1*	+2	+2	+2	+2	-	+1	-2	+2	+2	-1	+1	-2	-1	-3	-2	-	-9	-1	-
None of the above	27%	20%	23%	11%	11%	15%	8%	24%	19%	6%	5%	4%	3%	22%	35%	9%	10%	5%	8%
vs. Wave 1*	-	+4	+4	+2	+1	-3	+1	-6	-1	-3	-	+2	-	-4	+4	+2	+1	+1	-

*The results for UAE is compared against Wave 2 as we only started tracking this market from Wave 2.

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

Communications from service providers are perceived as sufficient in general (except Japan and Korea). There is a strong improvement of 21 percentage points in the perception of communications in Hong Kong vs. two months ago.



*The results for UAE is compared against Wave 2 as we only started tracking this market from Wave 2.

Utilities and Service Providers Executive Summary

On the level of support from service providers and utilities, the perception from consumers continues to be rather divided. Across most markets in Europe and Asia, over half feel that the service providers are less supportive. Consumers in the US, Malaysia, China & India, on the other hand, are rather polarised in the perception of supportiveness from service providers.

Meanwhile, most consumers across the markets (except Korea) still consider the communications from service providers as “**sufficient**”. Australia and Japan have seen an improvement of 6 and 7 percentage points respectively in terms of sufficiency of communications.

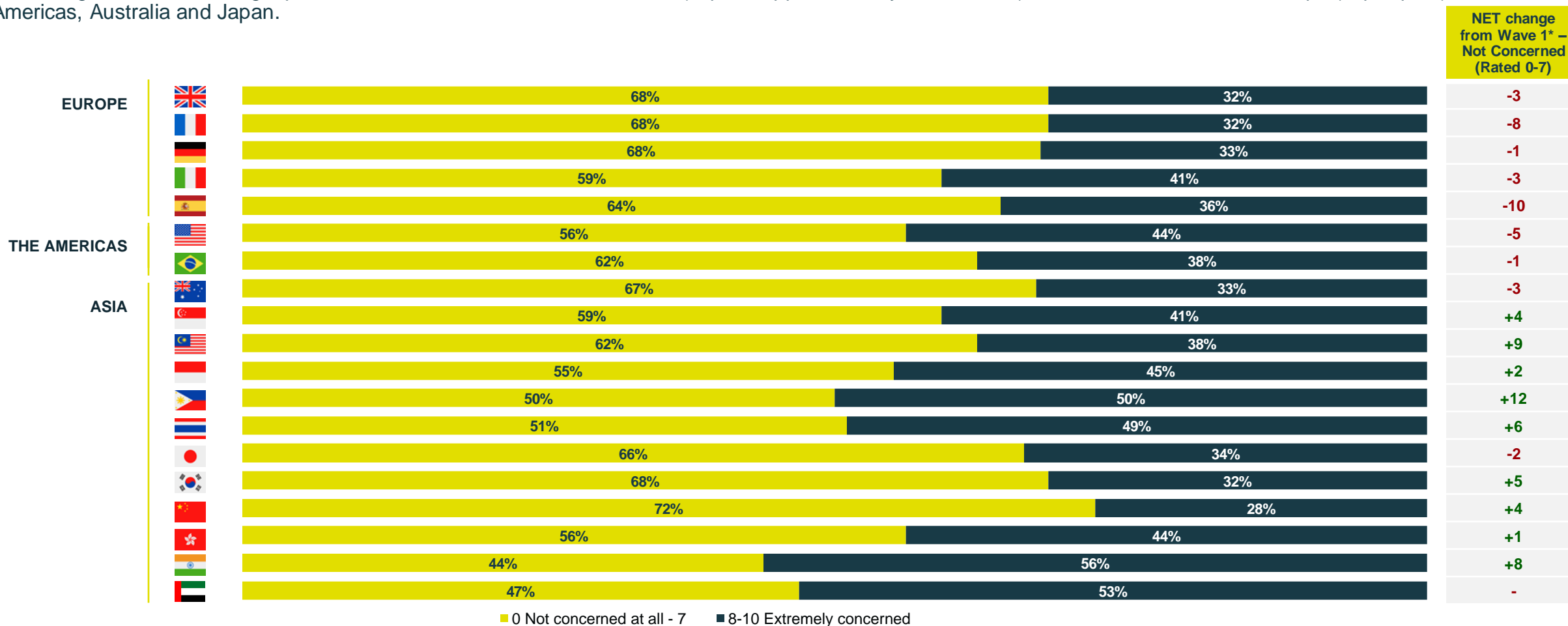
Emails remain the major form of communications in Europe, the US and Australia, while social media is dominant for Southeast Asia. The content is also mostly considered as positive, with “**informative**” and “**helpful**” being the most popular perceptions on the communications.

A man with a beard, wearing a dark jacket and jeans, is sitting in a black airport-style chair. He is looking out of a large window at an airplane taking off. His legs are crossed at the ankles. A black suitcase is on the floor next to him. The word "Travel" is written in large yellow letters on the left side of the image.

Travel

How concerned are you about travel restrictions with regards to the outbreak of coronavirus (COVID-19)?

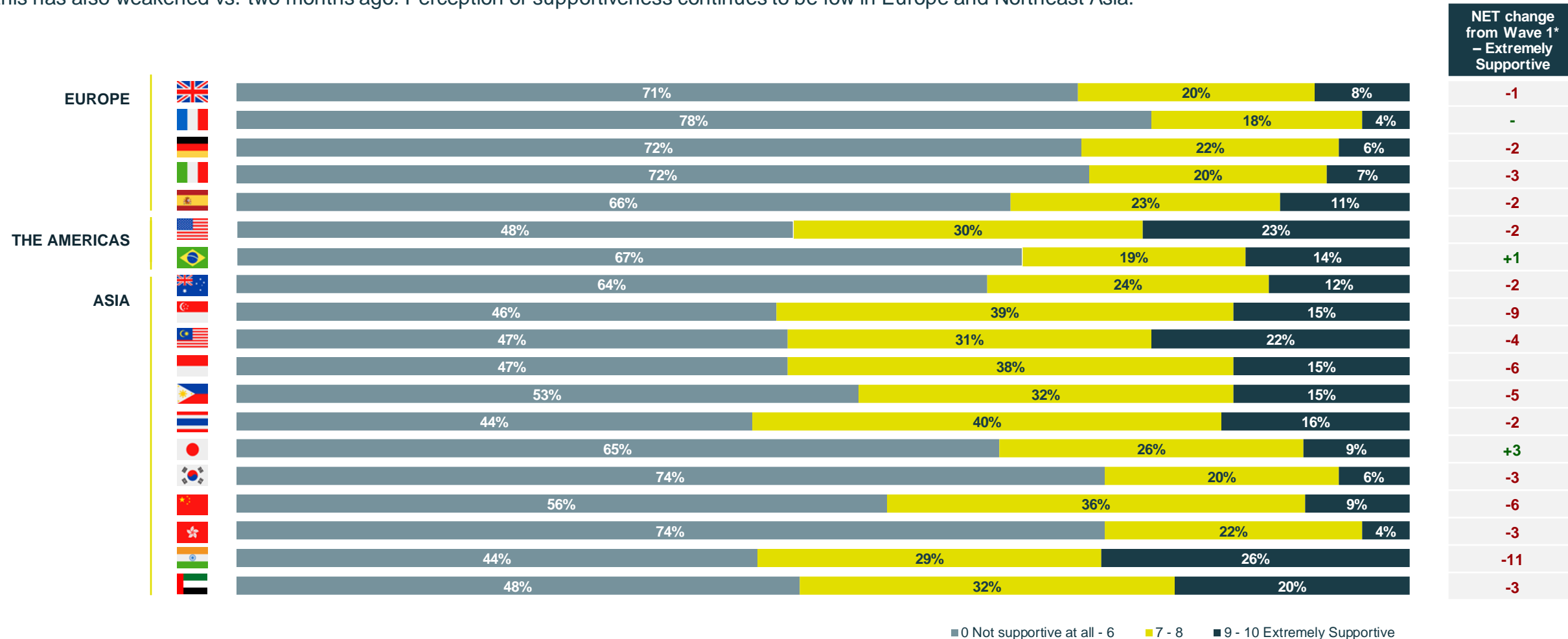
Concern on travel restrictions remains the highest in India and UAE, while consumers in China, Korea, UK, France and Germany are the lowest. Compared with 2 months ago, there is a stronger peace of mind on travel restrictions in Asia (esp. Philippines, Malaysia and India), but this has lessened in Europe (esp. Spain), the Americas, Australia and Japan.



*The results for UAE is compared against Wave 2 as we only started tracking this market from Wave 2.

When thinking about travel industry operators (e.g. airlines, hotels, cruise companies), rate the level of supportiveness they have provided to you.




















Travel industry operators are considered as less supportive in general. Consumers in India are still considering travel operators as being extremely supportive, though this has also weakened vs. two months ago. Perception of supportiveness continues to be low in Europe and Northeast Asia.



*The results for UAE is compared against Wave 2 as we only started tracking this market from Wave 2.

Which month is the soonest you would feel comfortable booking tickets for a foreign holiday, given the coronavirus outbreak?

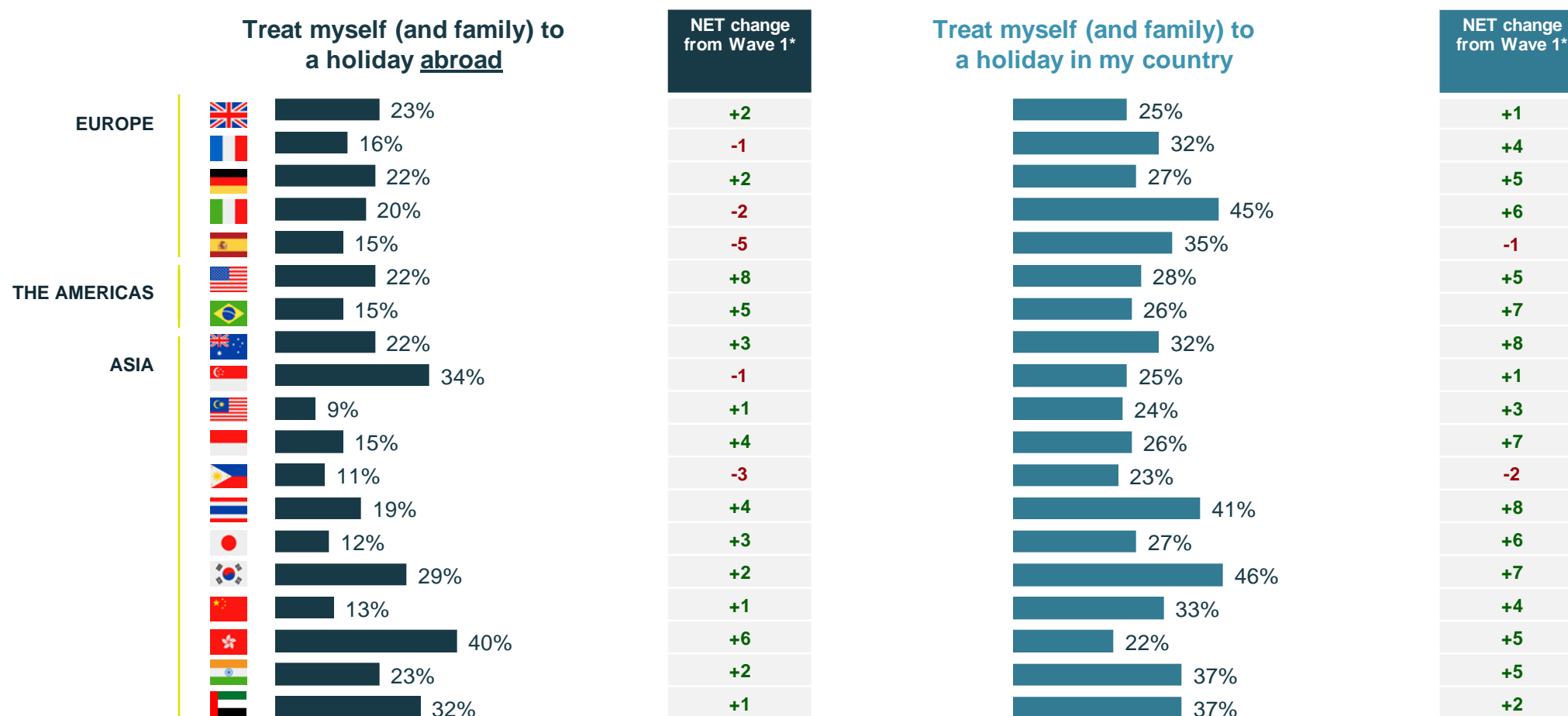
Consumers are holding back their plan for a foreign holiday in general – most are pushing back to Q4 2020 or later. However, the confidence of consumers in Australia, Thailand and Hong Kong have improved vs. two months ago, i.e. more of them are comfortable with having their holiday within next 12 months. Consumers in France and the US are among the most confident of having foreign holiday in the near future, with over 40% looking for a holiday within the next 5 months.

	EUROPE					THE AMERICAS		ASIA											
																			
May to June 2020	6%	5%	8%	4%	4%	18%	4%	6%	5%	1%	6%	3%	10%	3%	4%	10%	5%	9%	8%
vs. Wave 1*	-4	-12	-8	-3	-12	-5	-5	-3	-11	-5	-10	-7	-1	-3	-4	-21	-1	-16	-9
July to September 2020	21%	38%	29%	26%	33%	30%	11%	17%	16%	5%	16%	10%	16%	10%	27%	28%	17%	19%	25%
vs. Wave 1*	-5	-5	-5	-10	-14	+11	-10	+3	+1	-5	-10	-9	+4	-8	-6	-6	-	+1	-8
October to December 2020	15%	13%	15%	14%	15%	22%	23%	22%	24%	13%	27%	21%	24%	13%	22%	26%	26%	28%	29%
vs. Wave 1*	-	+5	+4	-	+6	+9	-2	-	-	-	+14	-3	+13	-2	+3	+14	+3	+6	+5
January to March 2021	16%	10%	10%	10%	13%	8%	30%	21%	26%	21%	20%	26%	16%	15%	14%	10%	21%	22%	18%
vs. Wave 1*	+2	+6	-	-2	+4	-1	+6	+2	+10	-7	+8	+8	+5	-	-1	+6	+5	+13	+5
April to May 2021	19%	11%	15%	20%	17%	7%	13%	14%	12%	20%	6%	21%	9%	15%	13%	8%	12%	10%	12%
vs. Wave 1*	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
I wouldn't be comfortable with any of these months	23%	23%	22%	27%	18%	16%	19%	20%	18%	40%	25%	19%	25%	43%	20%	18%	19%	12%	7%
vs. Wave 1*	-6	-	-2	-3	+3	-6	+3	-10	-2	+1	-1	-	-12	-	-3	+5	-15	-1	-2

*The results for UAE is compared against Wave 2 as we only started tracking this market from Wave 2.

Once the coronavirus crisis is over, are you likely to treat yourself (and family) a holiday?

In general, consumers are increasingly likely to treat themselves to a holiday after the crisis across most markets, except Spain and Philippines where the proportion trails down vs. 2 months ago. Consumers in Singapore, Hong Kong and UAE are most inclined to treat themselves to a foreign holiday when the crisis is over, while those in Italy, Thailand and Korea are more likely going for a domestic holiday.



*The results for UAE is compared against Wave 2 as we only started tracking this market from Wave 2.

Travel Executive Summary

The **concern towards travel restrictions** are varied across markets. Compared with 2 months ago, the concern on travel restrictions have lessened across Asian markets where the virus situation has improved. On the other hand, more consumers in Europe are expressing concerns over the travel restrictions.

Consumers across the globe are also **pushing back their travel plans** to at least Q4 2020 in general. Interestingly, consumers in the US and France are still among the most confident to plan for their travel abroad within the next 5 months, even though their concern towards the travel restrictions has heightened. Consumers from Australia, Thailand and Hong Kong are also becoming more confident in planning for overseas travel in the next 12 months vs. Wave 1 – consumers from Hong Kong in particular are most likely to treat themselves to a holiday abroad when the crisis is over (40% of Hong Kong consumers claim they would treat themselves or their families an overseas holiday).

The perception on **level of support from travel operators** remains rather weak across markets, particularly among consumers from Europe and Northeast Asia.

Thank you!