GLOBAL BAROMETER WAVE 6

Understanding the 2020 Consumer

toluna

harris interactive

KURUNDATA

About this study

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

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

This report covers 19 markets.

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

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

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Wave 6: Markets studied and field schedule

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

MARKET	COMPLETED INTERVIEWS	FIELDWORK DATES
UK	1,067	11th – 16th June 2020
France	1,072	11th – 16th June 2020
Germany	1,099	11th – 16th June 2020
Italy	1,149	11th – 16th June 2020
Spain	1,104	11th – 16th June 2020

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

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

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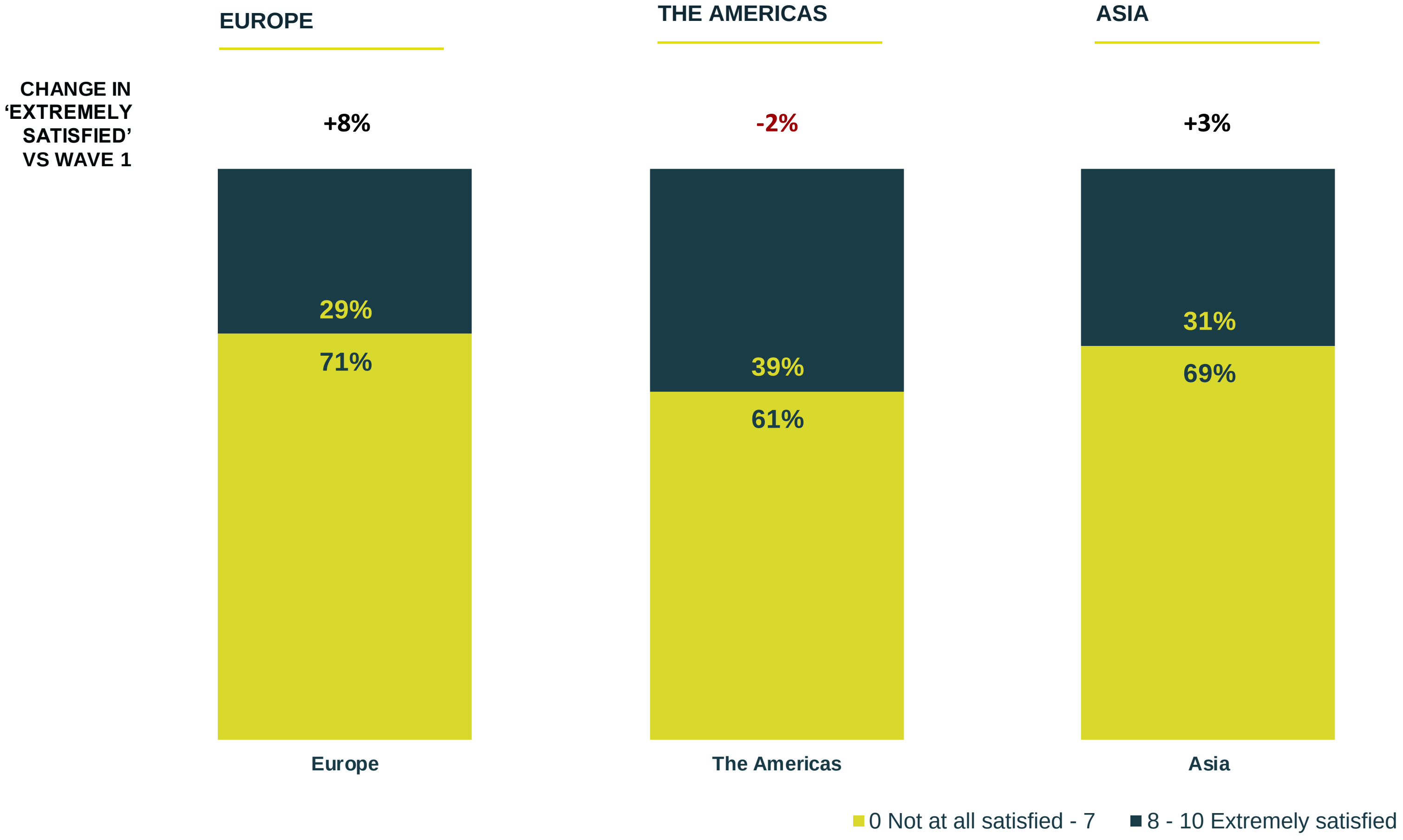
Consumer Behavior has changed as a result of COVID-19

- In all regions, people are less concerned with their finances than they were at the start of the crisis.
- Europeans and people in Asia feel more satisfied with life now, than they were at the beginning of the pandemic. In the US, people are less satisfied (not surprising based on recent events).
- In Europe eating or drinking at a restaurant, bar or café with highest increase since the beginning of the crisis. Many are getting back to normal behaviors.
- In the US and APAC, people are delaying vacations until the end of the year. In Europe many have trips planned within the next 6 months.

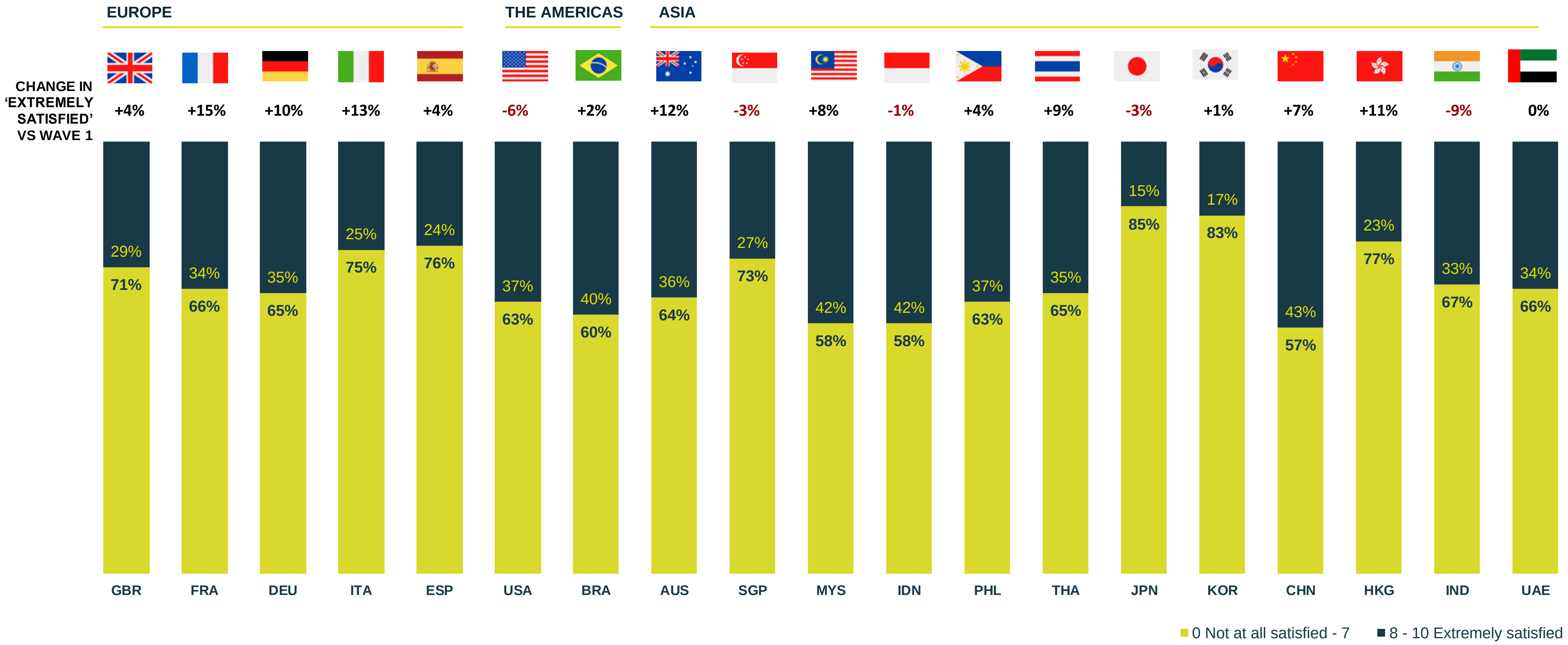
Level of satisfaction with life over the past 2 weeks

Satisfaction with life has increased for those in **Europe**, but there has been a slight decrease in satisfaction in the **Americas** compared to the first wave.



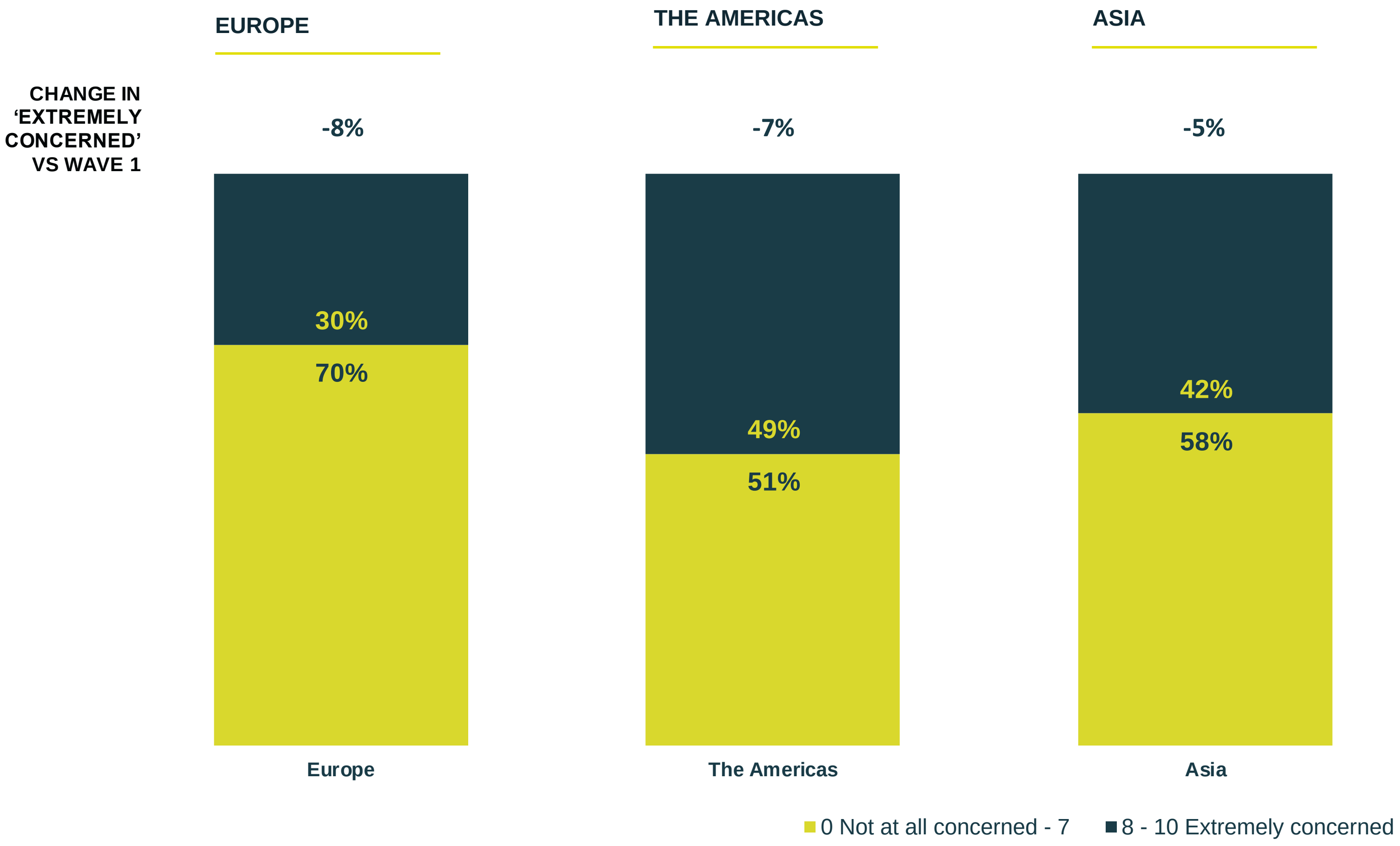
Level of satisfaction with life over the past 2 weeks

In most European countries satisfaction has increased compared to the beginning of the crisis. Outside Europe, Australia and Hong Kong see the largest increase in satisfaction with life, while in India and the US, satisfaction has dropped considerably.



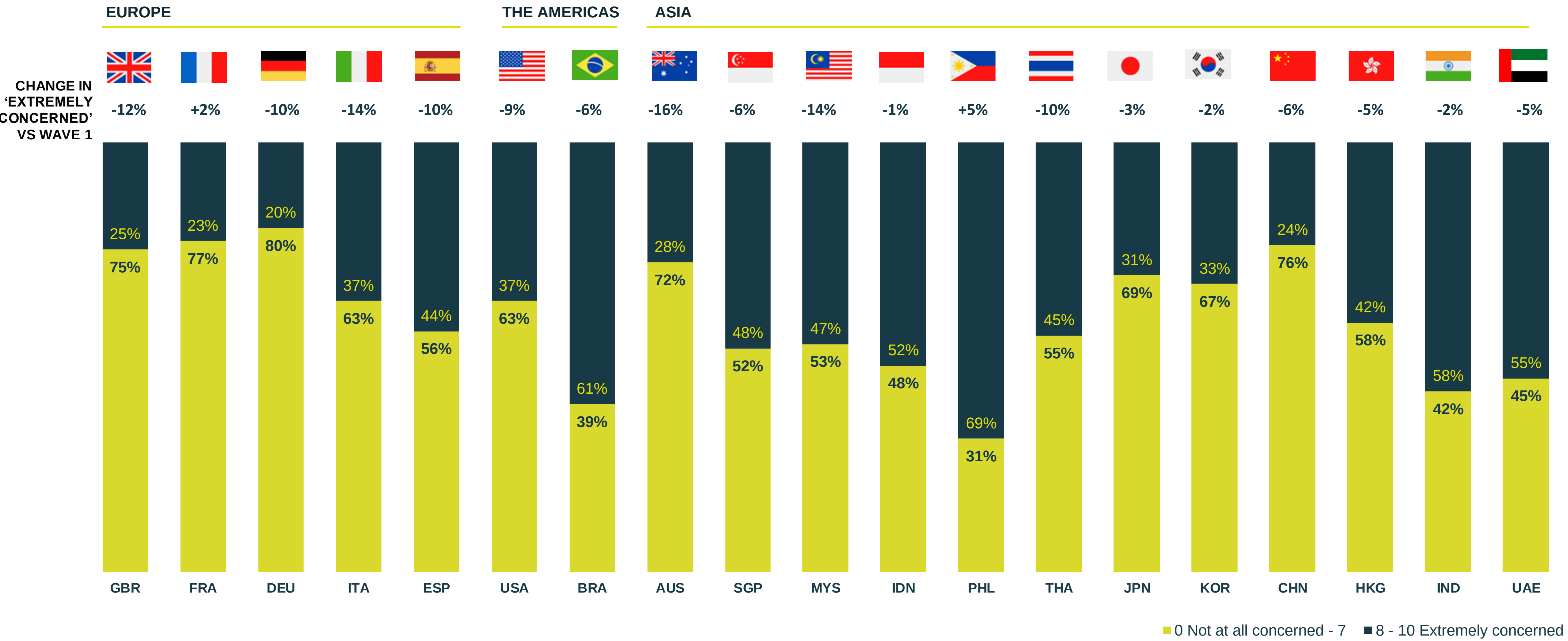
Level of concern about personal financial security

Across all regions, consumers are less concerned about personal financial security than they were at the beginning of the crisis.



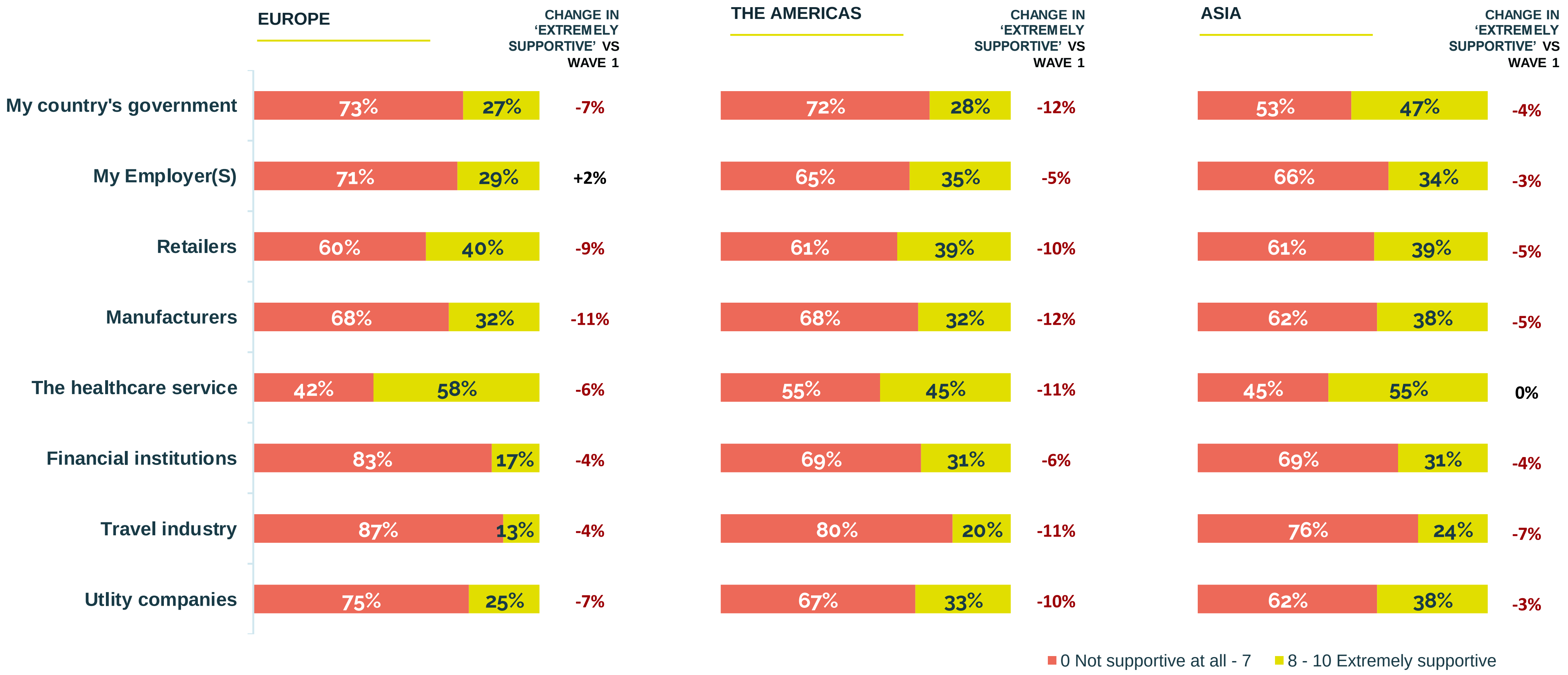
Level of concern about personal financial security

All markets are now seeing a lower proportion who are extremely concerned about financial security compared to wave 1 except for Philippines and France. Consumers in Philippines and Brazil are the most concerned.



Level of support given in response to the Coronavirus outbreak

Perceived level of support has dropped considerably across Europe, The Americas and Asia compared to the beginning of the crisis, with the Americas seeing the greatest downward trend.



Items spent money on in the past 2 weeks

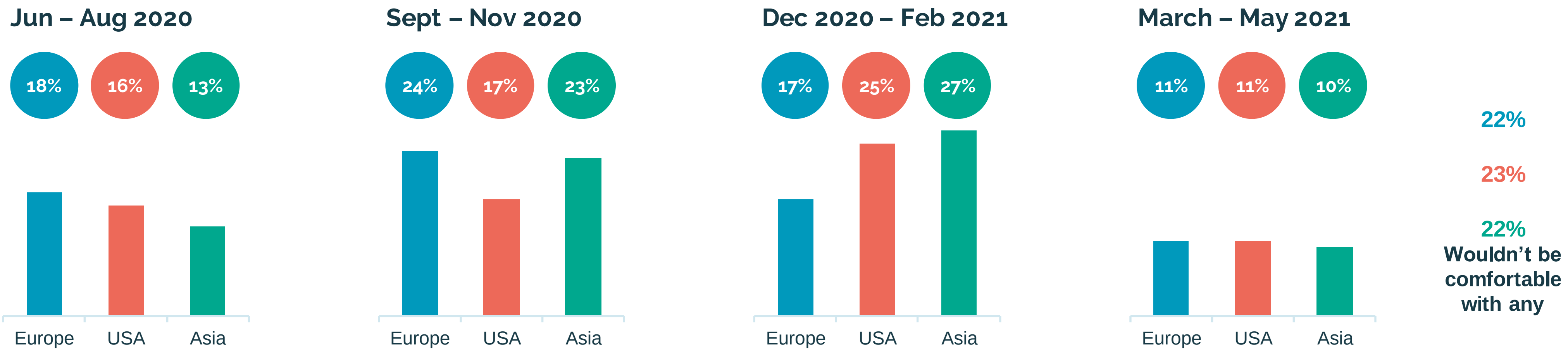
In Europe eating or drinking at a restaurant, bar or café with highest increase since the beginning of the crisis followed by home delivery and curb side or drive through.

	Europe		Americas		Asia	
	W6	vs w1	W6	vs w1	W6	vs w1
In-store grocery shopping	81%	+2%	74%	+1%	71%	-1%
Online grocery shopping	26%	+5%	34%	+4%	51%	+8%
Eating or drinking at a restaurant, bar or café	22%	+15%	15%	0%	25%	+7%
Home delivery of food or drink from a restaurant, bar or café	24%	+10%	37%	+5%	36%	+7%
Curb side or Drive Through pick up of food or drink from a restaurant, bar or café	19%	+10%	30%	+4%	23%	+4%
Online entertainment streaming services	33%	+8%	43%	+9%	36%	+6%

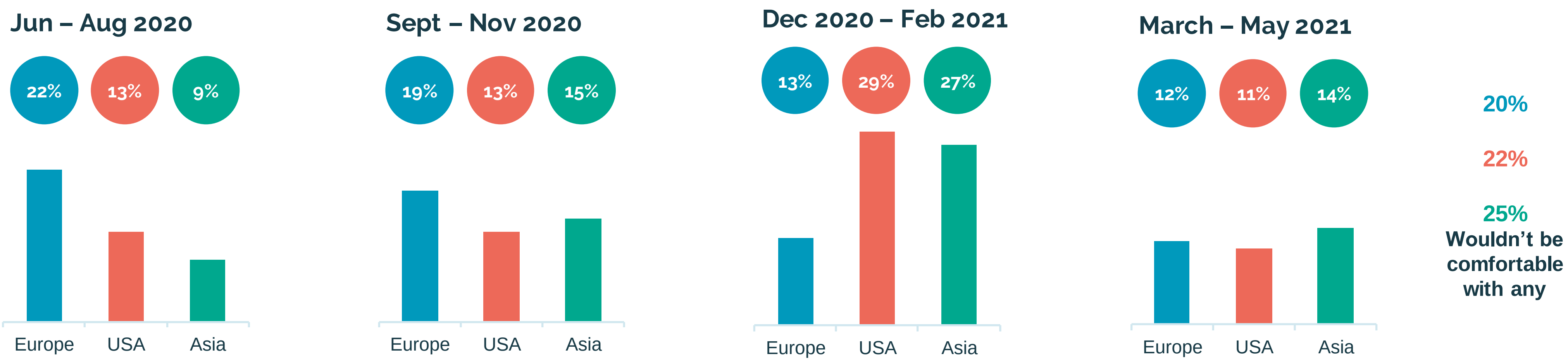
Season comfortable with booking an event or holiday

In Europe, consumers are more comfortable with booking a holiday over the coming months, with 41% who would book a holiday within the next 6 months. Confidence is lower in the Americas and Asia where a higher proportion are pushing back to the end of the year and next year.

Event taking place in…

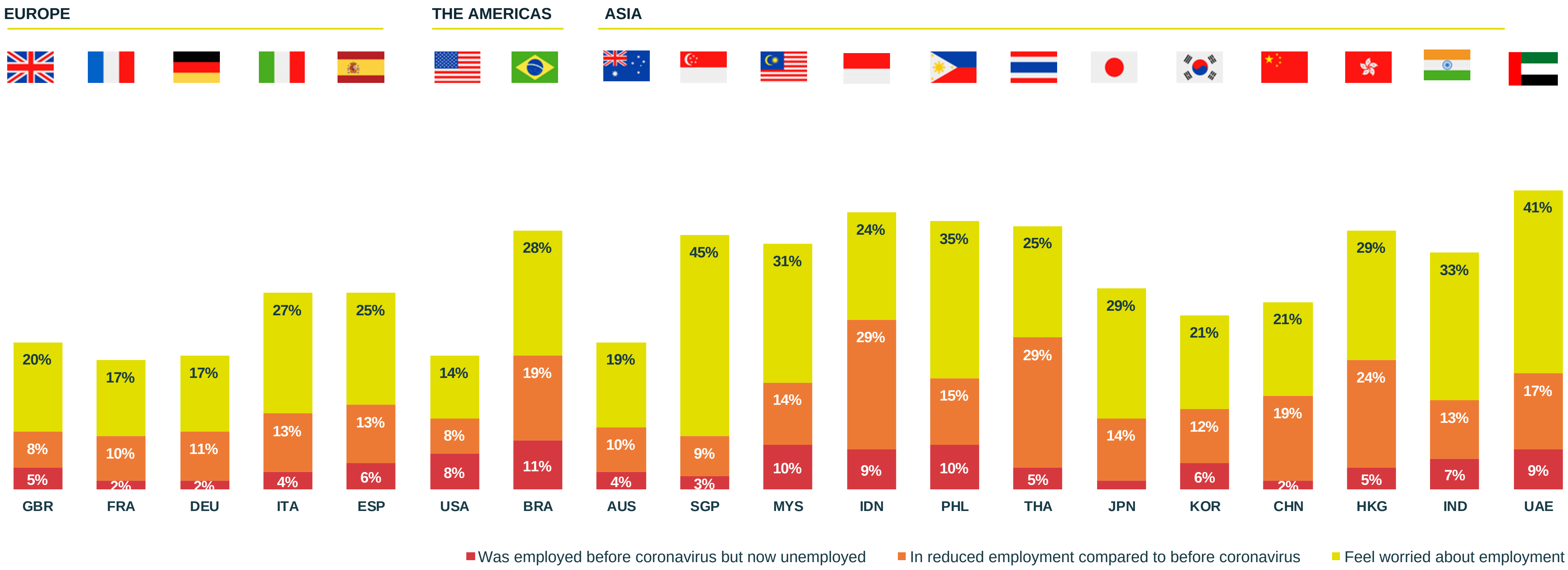


Holiday taking place in…



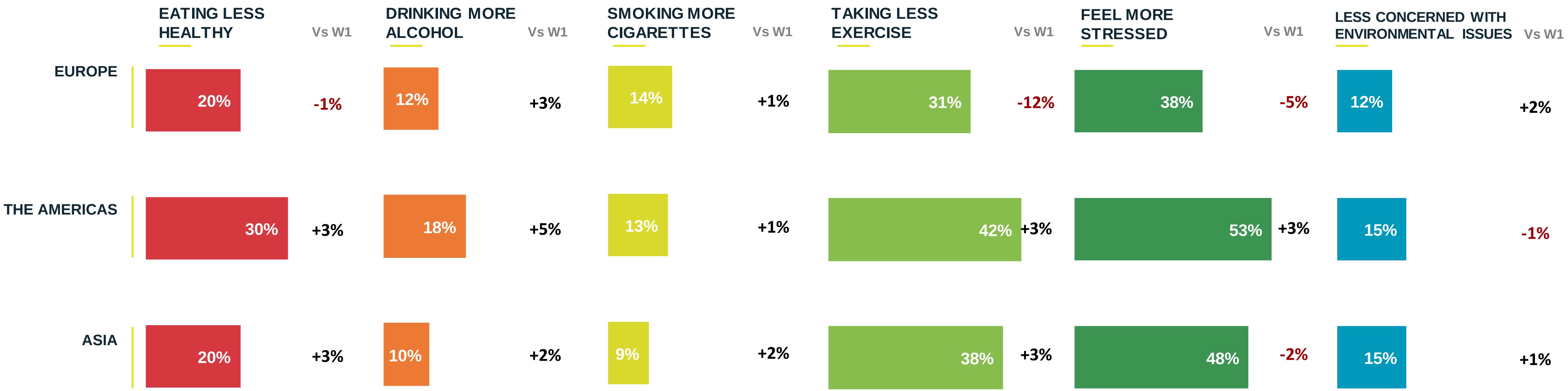
Perceived level of security in employment over the past 2 weeks

Overall, perceived level of employment security is lowest in Brazil and Asian countries (except Australia, China, Korea, Japan). In Brazil, Malaysia, Indonesia, Philippines and UAE see the most unemployment due to the crisis.



Coronavirus restrictions knock-on effects

Compared to the beginning of the crisis highest increase for Europeans taking exercise. Americans and Asians are exercising less.



Activities likely to undertake in the next 1-2 months

Going out to eat and **being more health conscious** are activities that many consumers plan to undertake where possible as restrictions ease. Consumers in Asia are more likely to be more health conscious (using vitamins and taking more exercise/eating healthy) while in Europe, going out and eat and visiting the hairdressers is expected by many.

	Be more health conscious i.e. using vitamins	Be more health conscious i.e. taking more exercise/eating healthy	Have routine-check up more frequently (blood-pressure, blood levels, cardio-vascular test etc.)	Go to the hairdressers/ salon	Go to the gym	Go to the spa	Go out to eat	Go to the cinema/ theatre	Send kids to school/ day care	Return to workplace	Volunteer
EUROPE	17%	36%	18%	41%	17%	8%	48%	24%	10%	23%	10%
THE AMERICAS	34%	47%	34%	34%	23%	6%	40%	22%	14%	26%	12%
ASIA	41%	53%	25%	31%	18%	8%	43%	21%	13%	29%	12%

Highest scoring activity per market · 2nd highest scoring activity per market · 3rd highest scoring activity per market

Activities likely to undertake in the next 1-2 months

Relatively few consumers expect to go on an overseas holiday in the next 1-2 months, although more would go away within their own country – particularly in Italy, France, Spain and Thailand.

	Treat myself / family to a holiday abroad	Treat myself / family to a holiday in my country	Buy something of significant value	Spend more money generally	Be more optimistic about the future	Be more environmentally conscious
EUROPE	10%	16%	7%	15%	28%	21%
	13%	31%	7%	12%	19%	28%
	16%	23%	7%	11%	23%	15%
	13%	42%	11%	15%	32%	32%
	11%	33%	9%	14%	34%	26%
THE AMERICAS	10%	17%	14%	18%	33%	19%
	6%	15%	16%	9%	45%	40%
ASIA	10%	23%	12%	16%	30%	19%
	15%	14%	16%	17%	36%	33%
	11%	25%	20%	12%	47%	43%
	10%	18%	23%	12%	50%	56%
	13%	21%	42%	11%	72%	61%
	12%	36%	20%	21%	45%	48%
	3%	13%	9%	9%	9%	13%
	12%	29%	3%	10%	21%	32%
	5%	21%	5%	26%	39%	51%
	19%	16%	6%	23%	16%	27%
	16%	20%	30%	22%	54%	56%
	27%	27%	26%	19%	51%	40%

Lowest scoring country for each measure

Highest scoring country for each measure

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

Generally, the biggest consequences of not being able to access products are **more online shopping** and having to **pay more** for something than normal. Europe is seeing the fewest consequences, and The Americas the most.

	EUROPE	AMERICAS	ASIA
Tried a new product	26%	36%	31%
Tried buying from a new brand	23%	36%	27%
Had to shop around for something in physical stores	23%	28%	26%
Had to shop around for something online	30%	40%	37%
Shopped in a physical store for something I'd usually buy online	7%	10%	16%
Shopped online for something I'd usually buy in a physical store	31%	43%	42%
Paid more for something than I usually would	33%	42%	32%
Paid less for something than I usually would	8%	14%	17%
Gone without something I'd usually buy	27%	37%	24%

Lowest scoring country for each measure

Highest scoring country for each measure

CPG/FMCG

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

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

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

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

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

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

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

3 highest scores per market

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

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

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

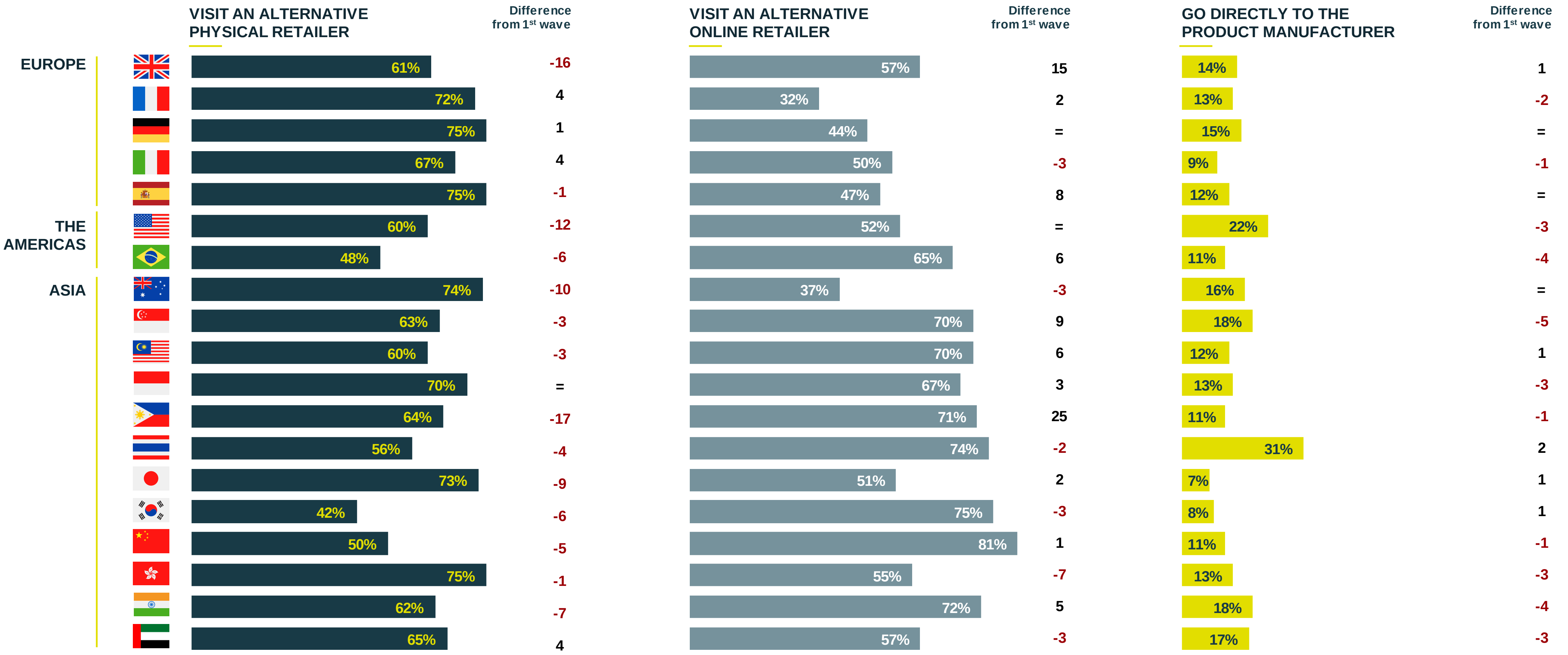
At least 5% lower than 1st wave

At least 5% higher than 1st wave

*Not asked in Wave 1

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

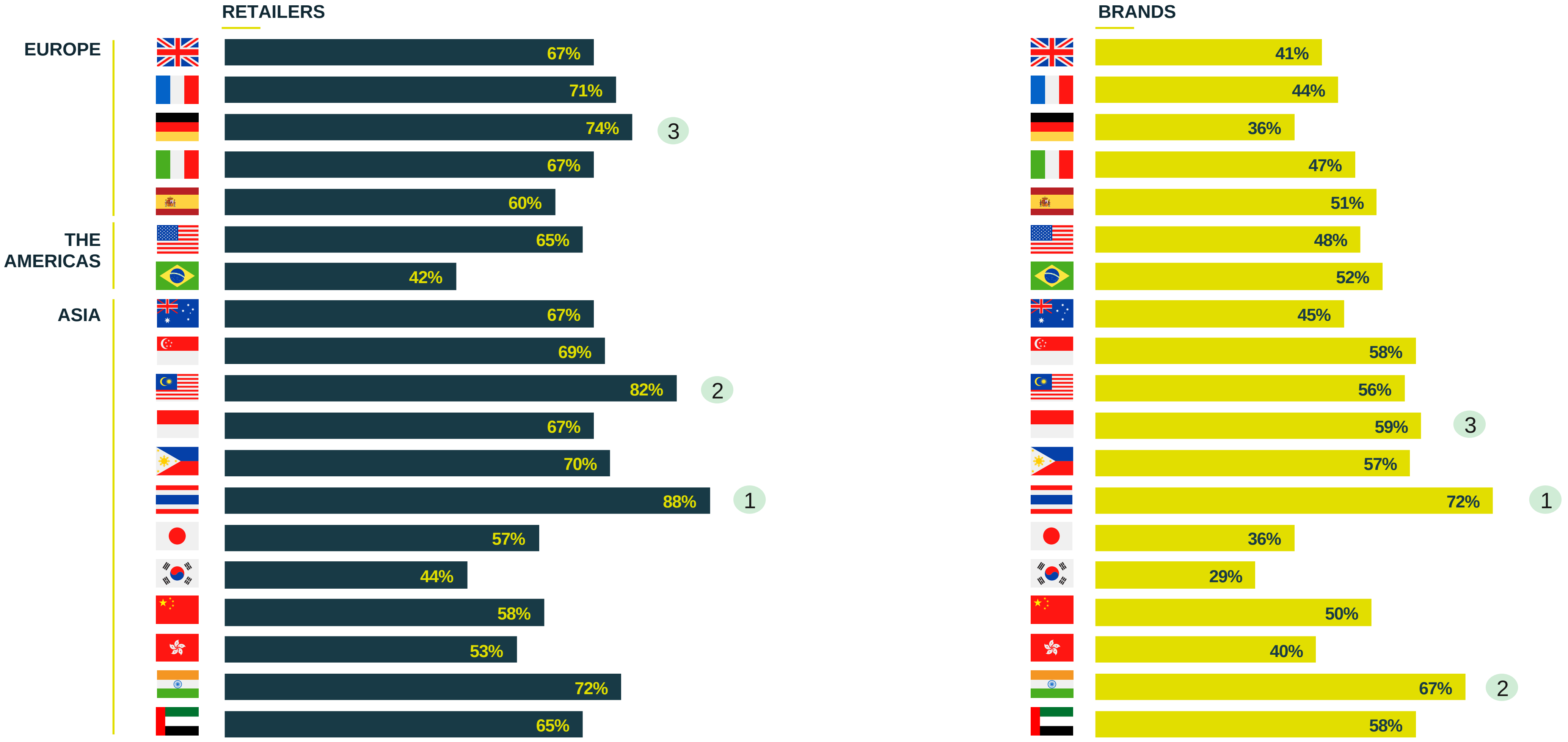
Except UK, the European markets have become more willing to seek an alternative physical retailer while Asian markets are more willing to seek an online alternative. The highest levels of willingness to go directly to the product manufacturer remains in the USA and Thailand.



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

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

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



3 highest scores per market

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

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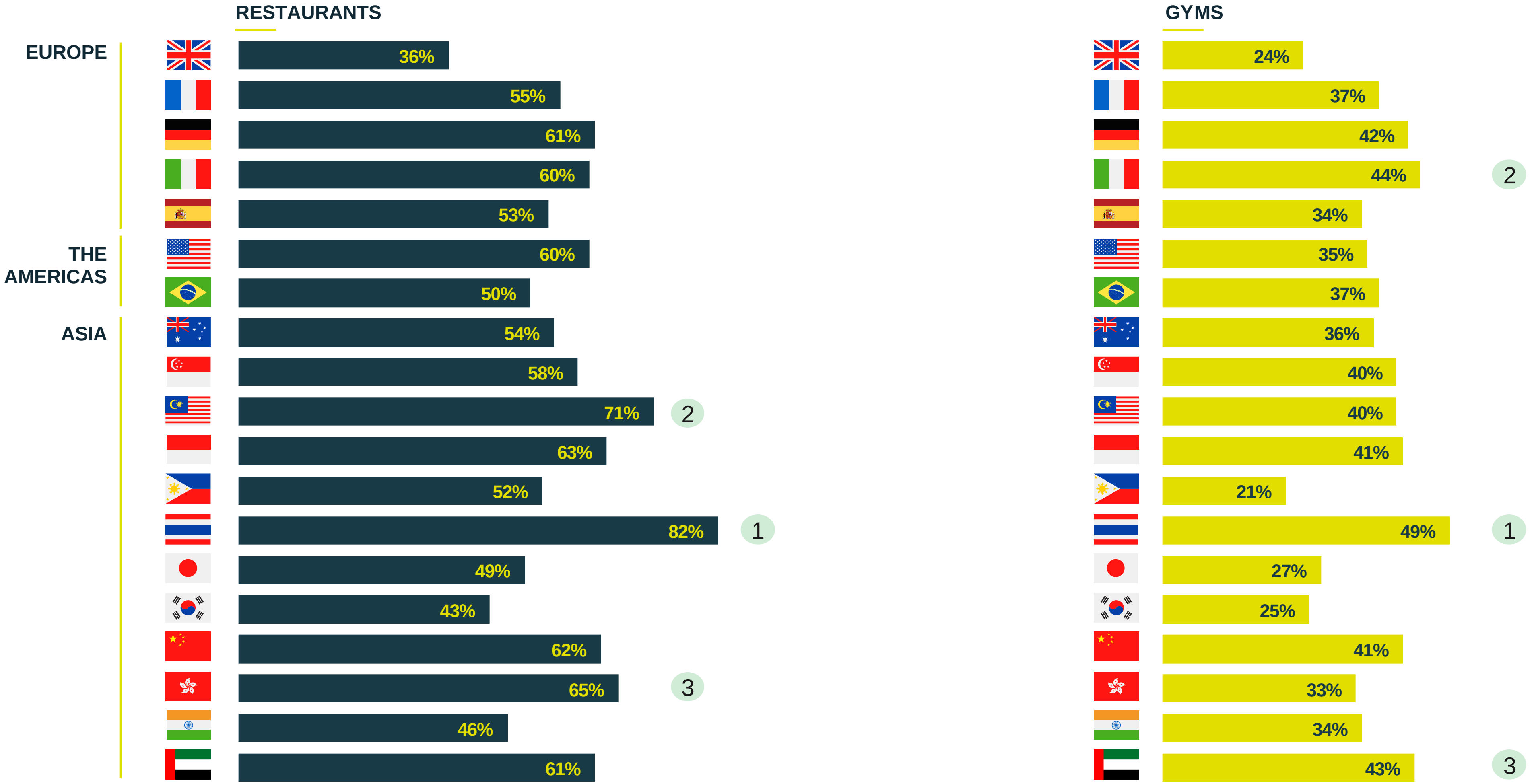
Are you getting sufficient communications about safety measures put in place to provide reassurance about Coronavirus?

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



3 highest scores per market

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

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

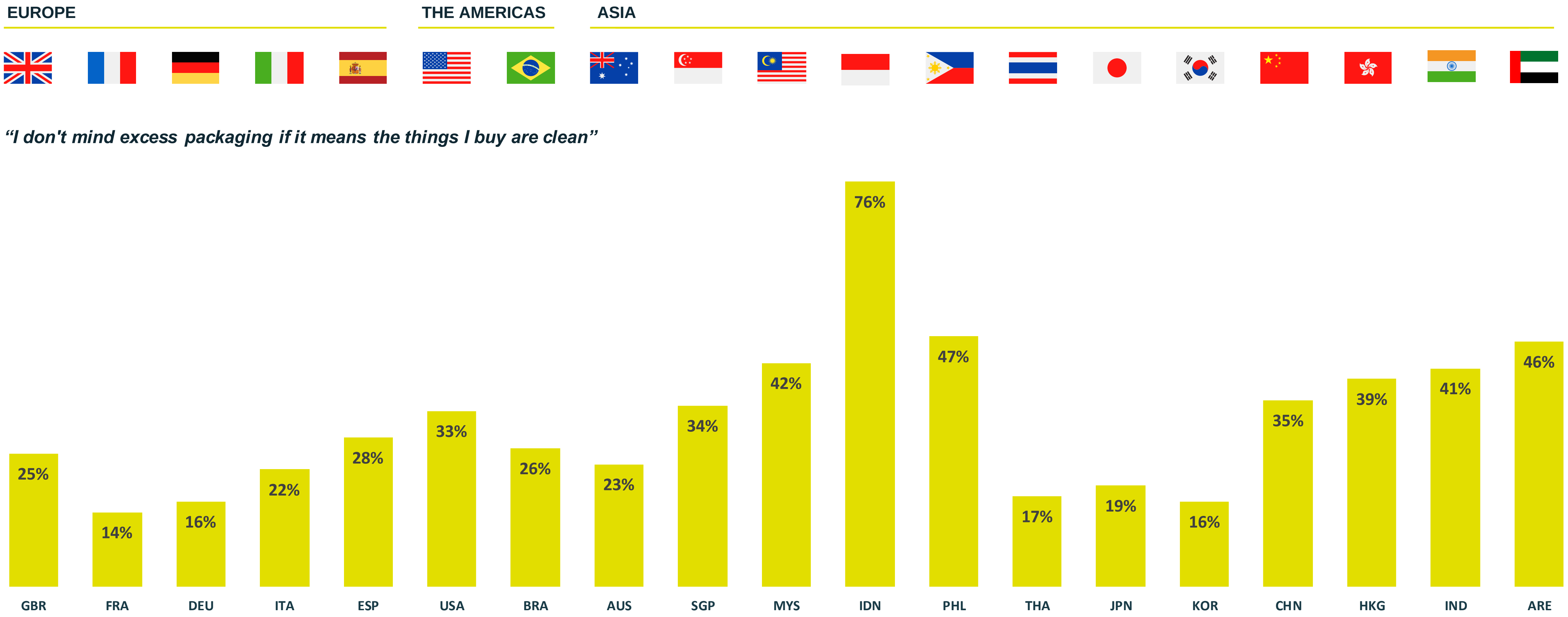
For hairdressers and beauty salons, consumers in Thailand and Italy feel the most reassured about safety measures through the communications provided, while the UK and the Philippines have the lowest scores.

3 highest scores per market

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

Health before preservation of the environment

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




Thank you
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