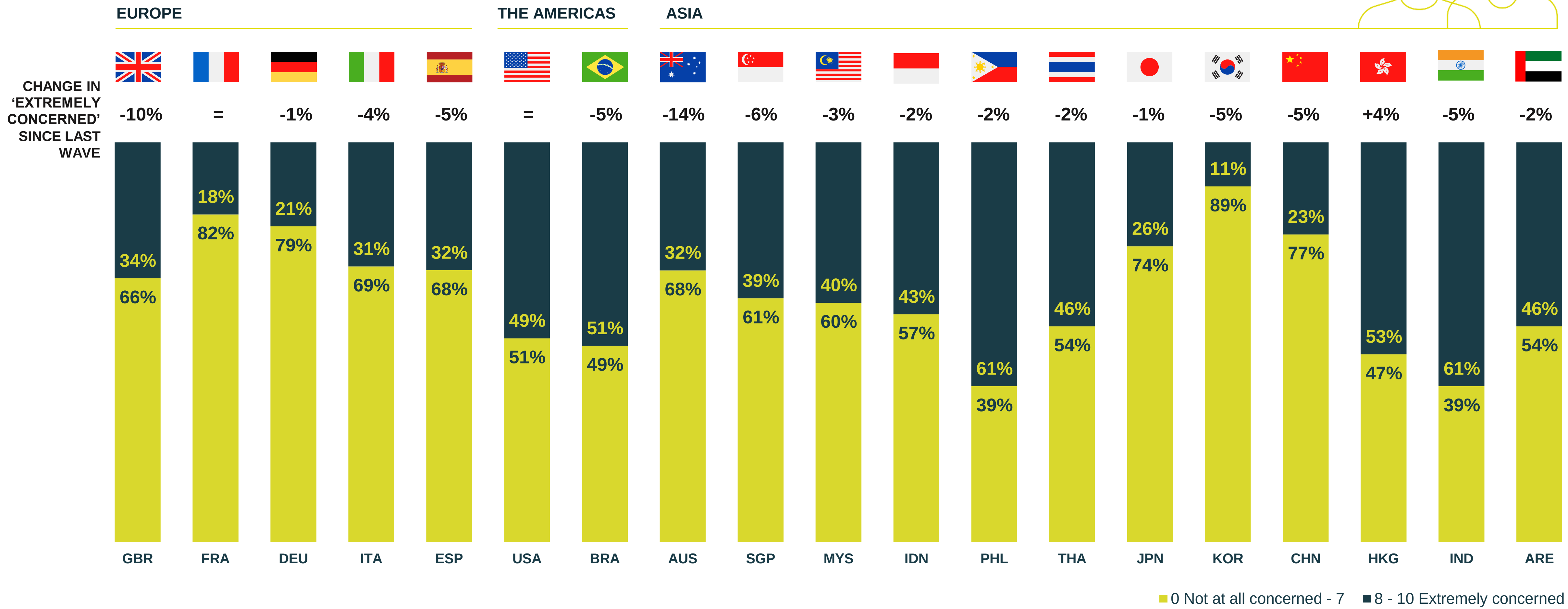
The Impact of COVID-19 and the CPG / FMCG Industry

Wave 2 Results
Released 23rd April

Toluna | harris interactive | KURUNDATA

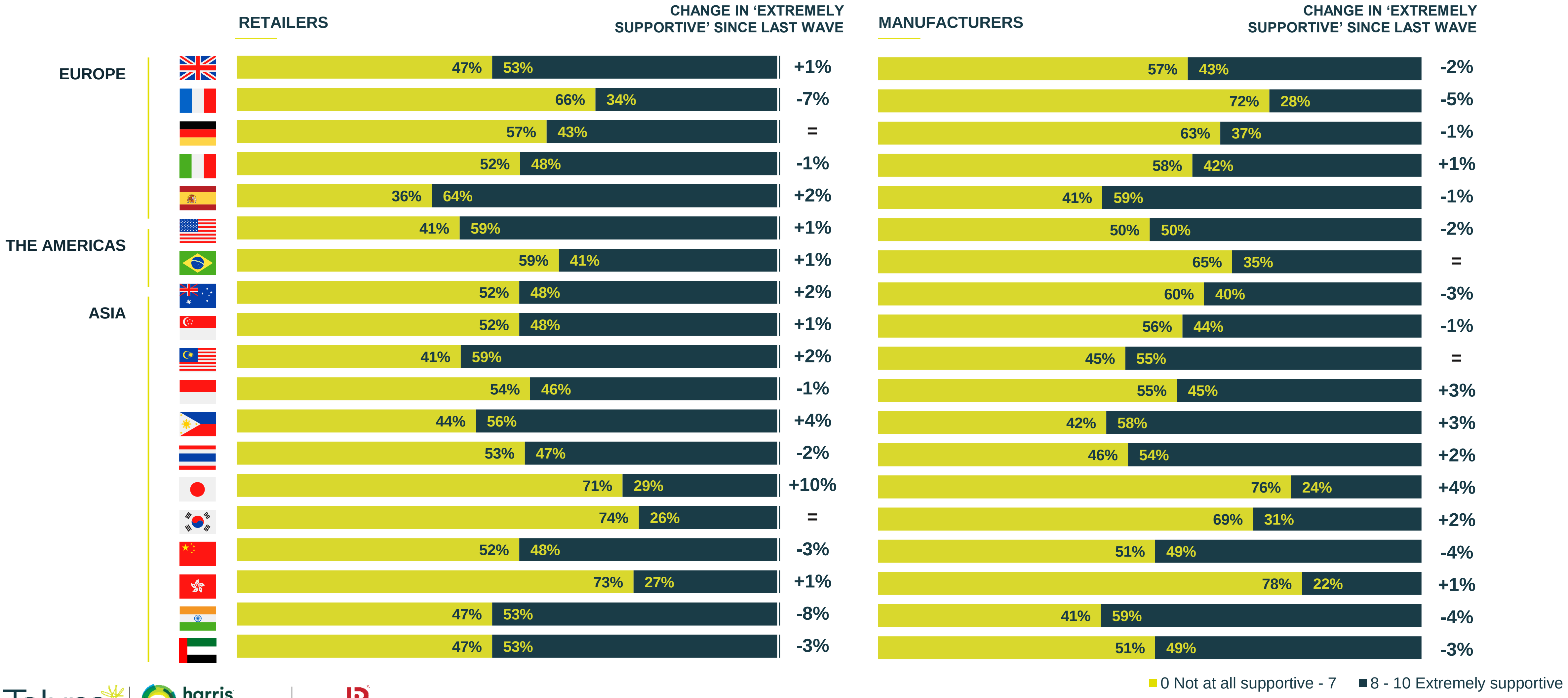
Level of concern with essential supplies (including groceries, toiletries and medication) because of the Coronavirus

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											
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.

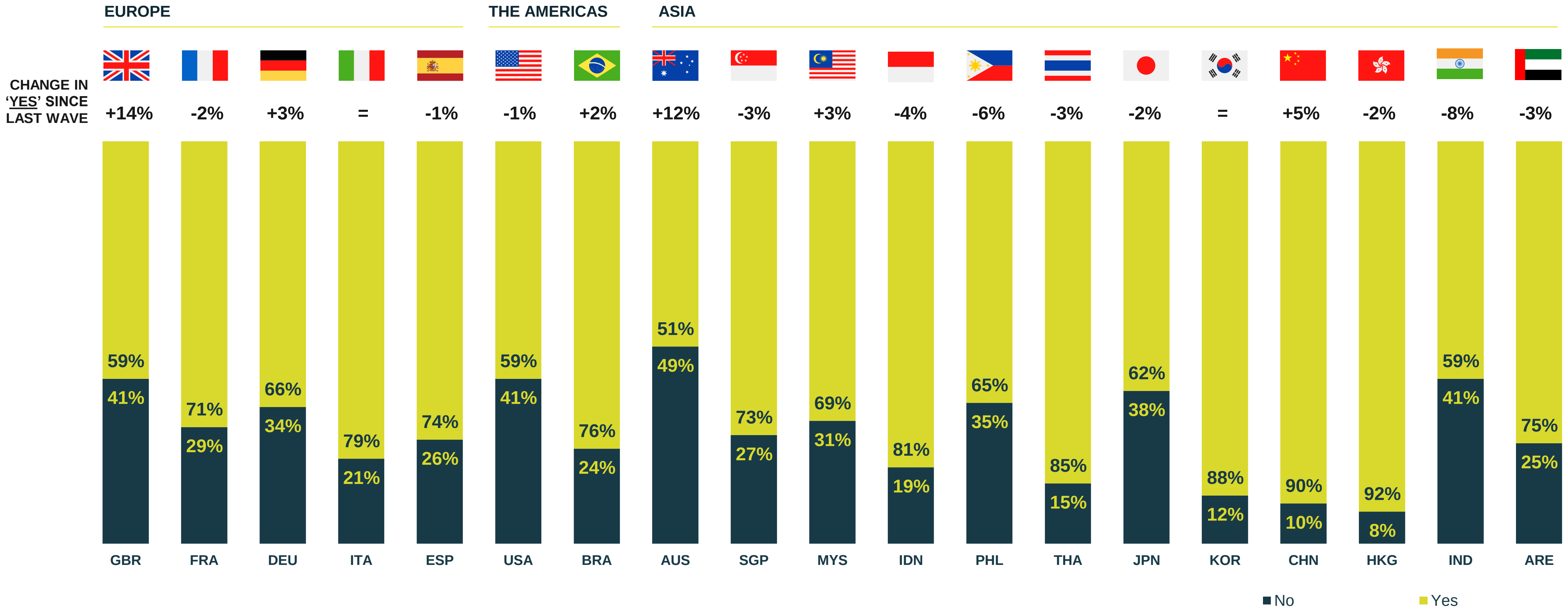
	EUROPE					THE AMERICAS		ASIA											
Eating or drinking at a restaurant, bar or café	65%	67%	46%	79%	82%	58%	76%	67%	67%	82%	77%	85%	82%	52%	57%	67%	67%	73%	71%
Curbside or Drive Through pick up of food or drink from a restaurant, bar or café	48%	57%	34%	69%	71%	30%	60%	39%	42%	70%	60%	71%	37%	23%	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.



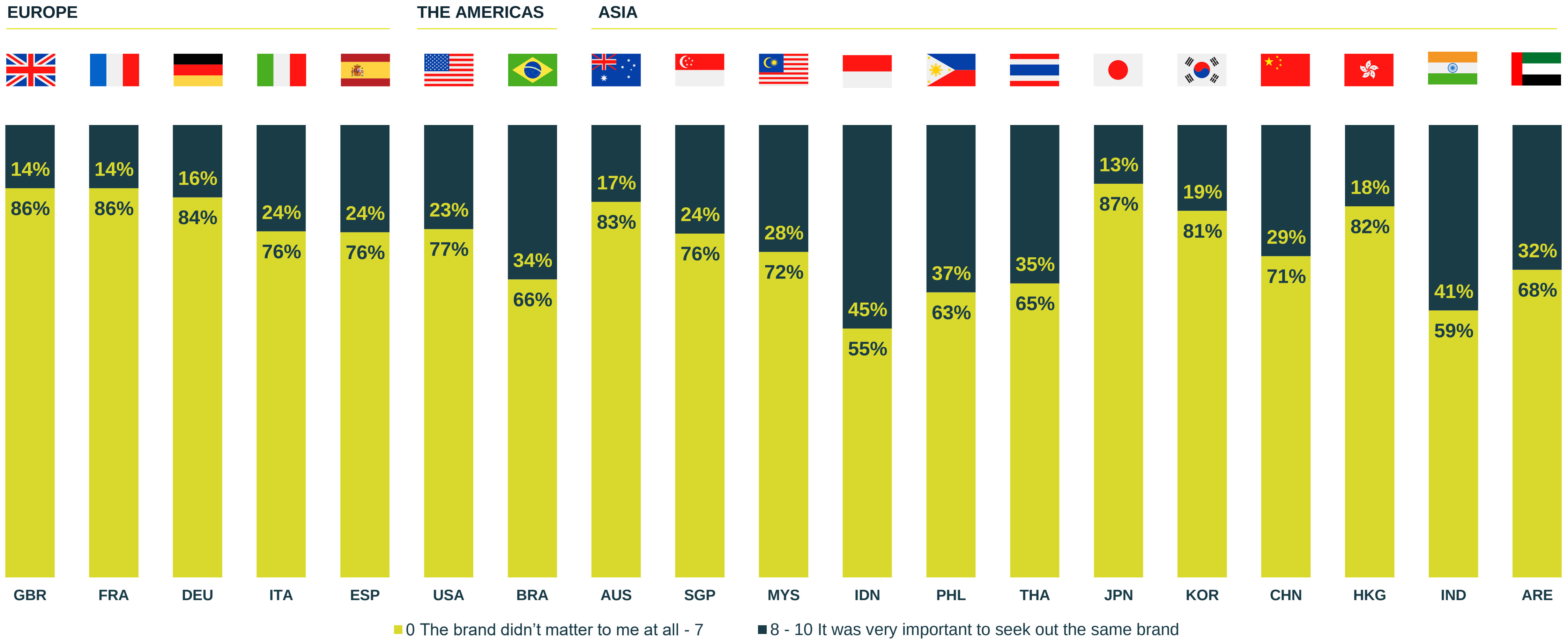
Consequences of not being able to access products or services as normal

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

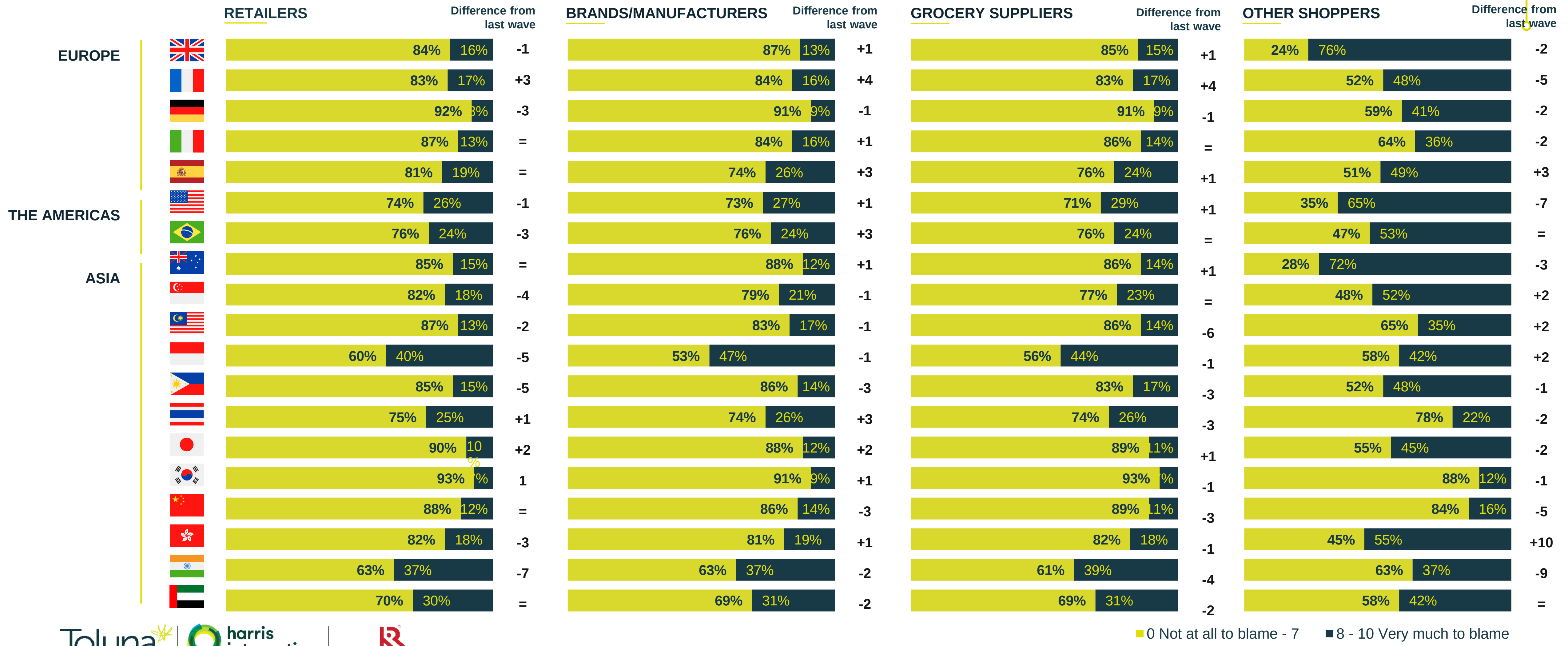
All of the European markets have become more willing to seek an alternative online retailer. The highest levels of willingness to go directly to the product manufacturer are seen in the USA and Thailand.

	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

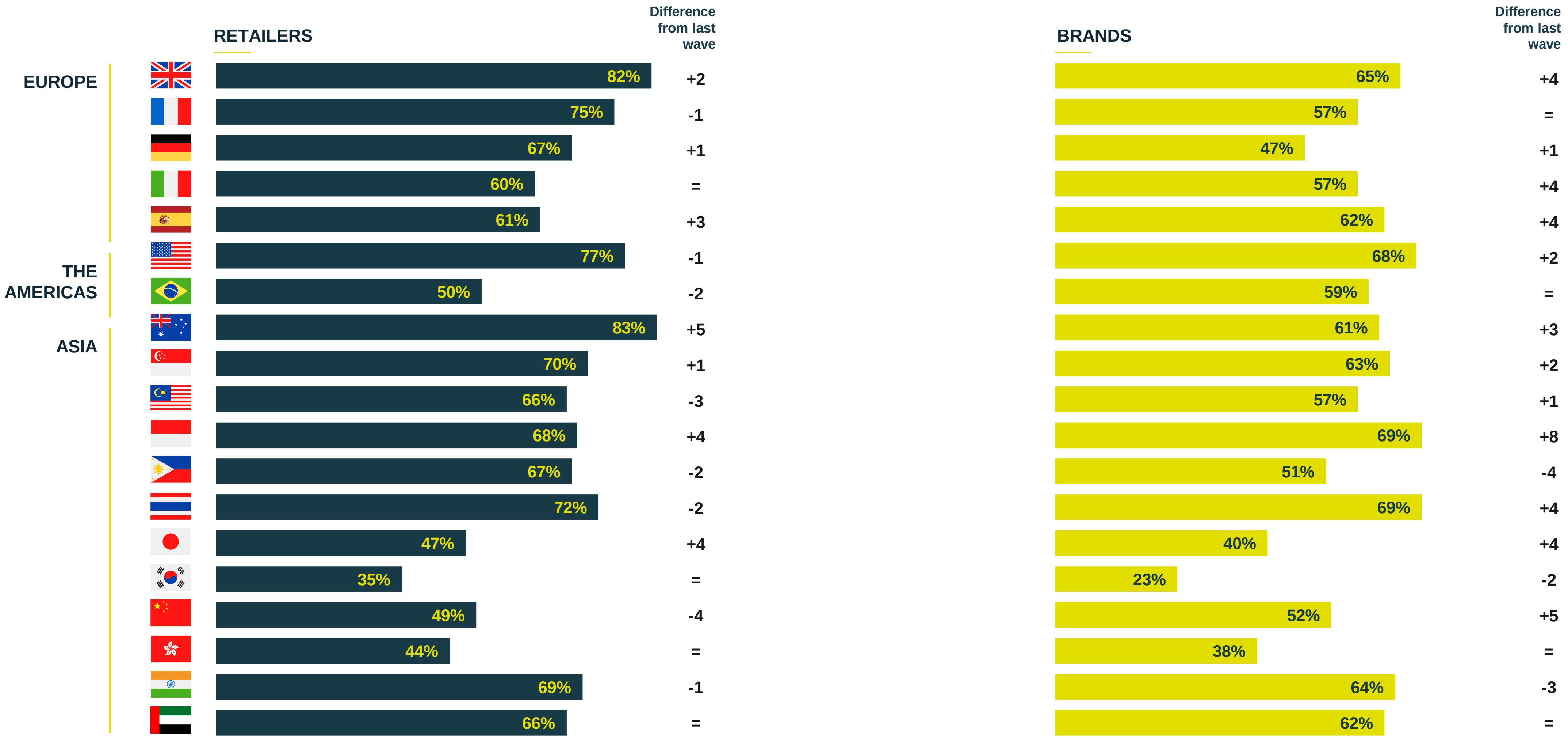
Blame regarding shortages of products since the outbreak of the coronavirus

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.



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

Thank you!