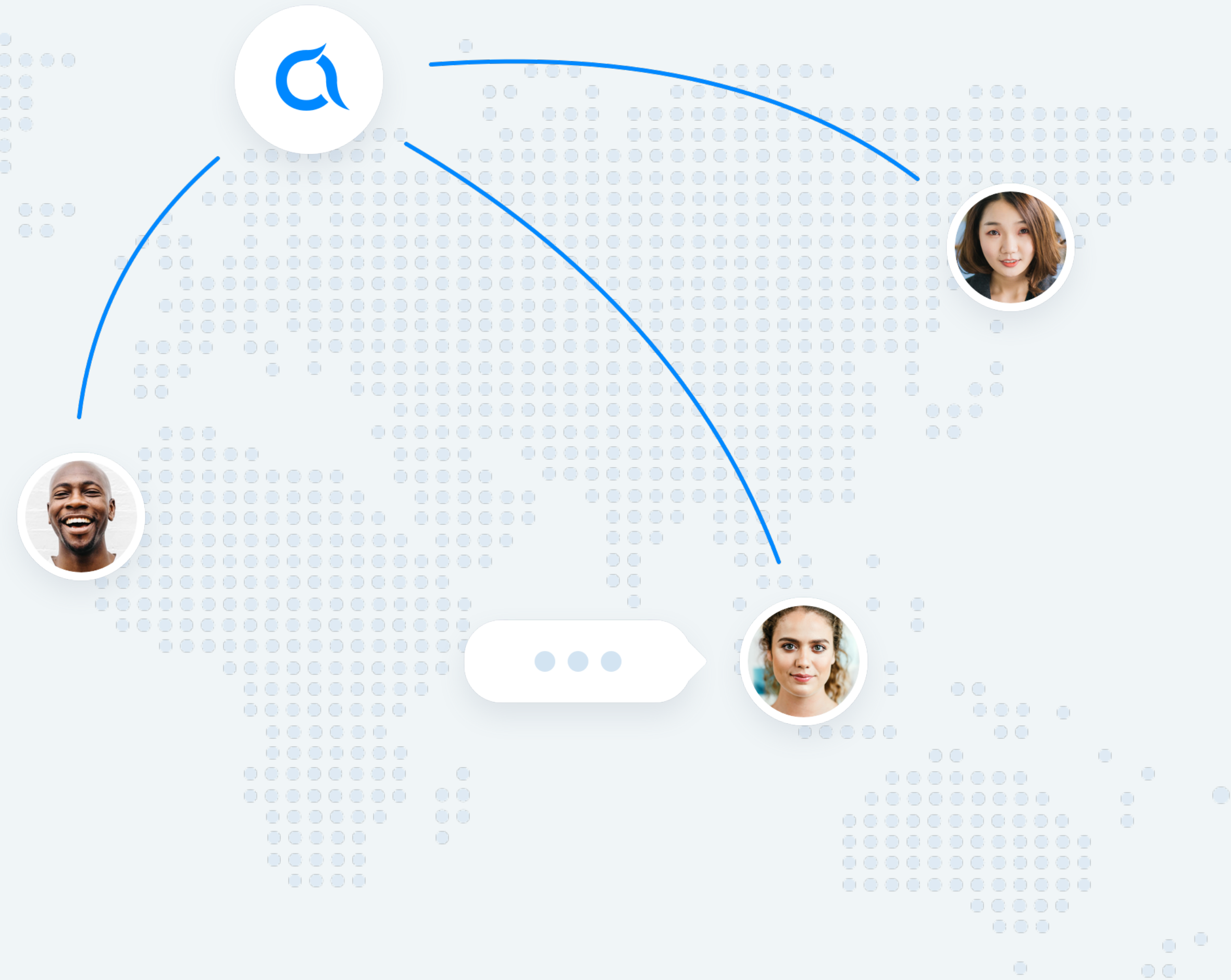


Consumer study: Coronavirus

Hamburg, March 24, 2020



Intro to the study

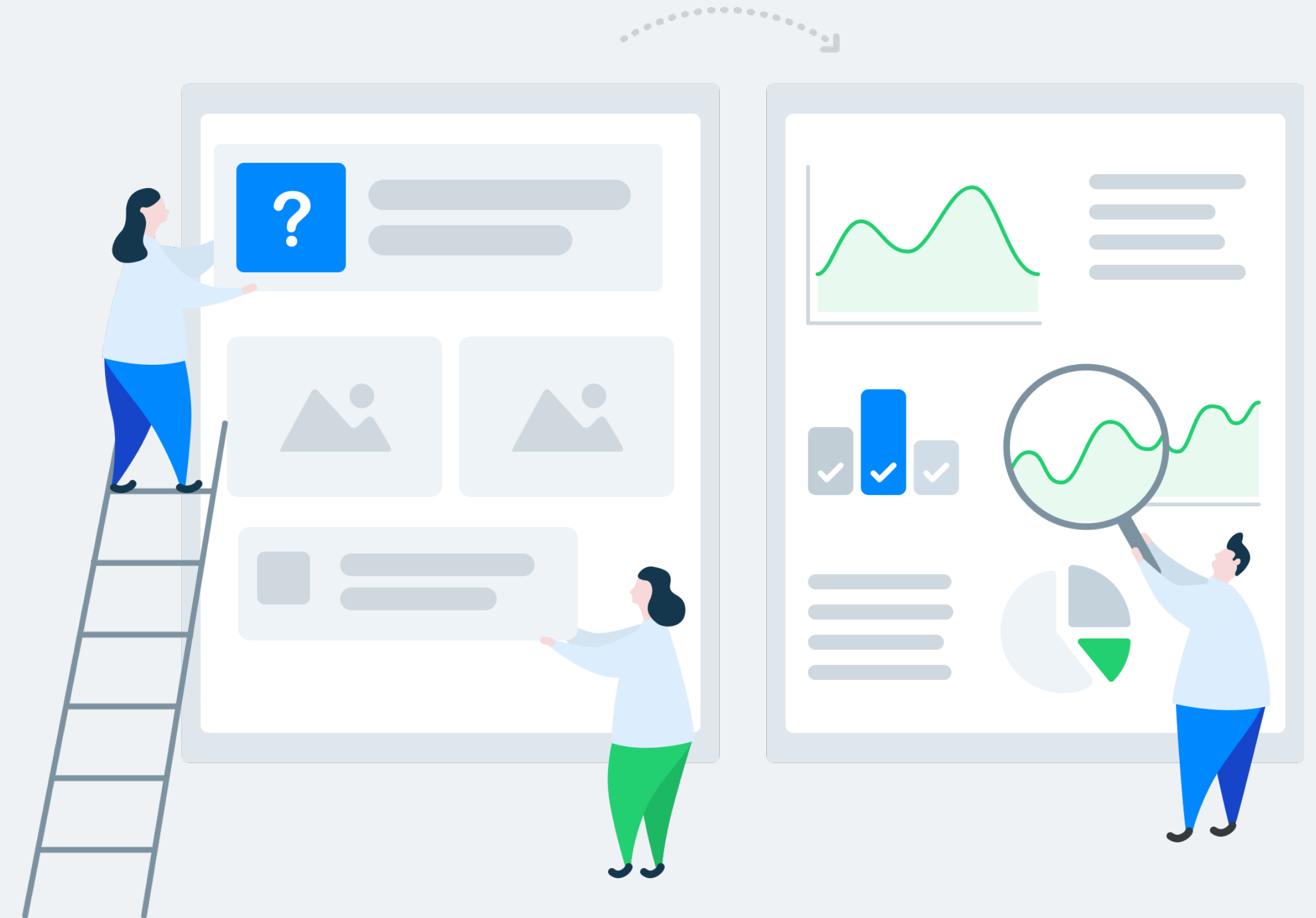
Life in the United Kingdom and other European countries is currently significantly impacted by the COVID-19 pandemic (coronavirus pandemic). That is why the market research company Appinio, based in Hamburg, Germany, has started a comprehensive tracking of the effects of coronavirus on the German population last week, and has now conducted a representative study on the national level in the UK covering the same aspects.

The study covers the implications of the coronavirus pandemic on everyday life and consumer behaviour of the British population. It encompasses, among other things, people's concerns about health, sources of information, changes of behaviour, buying behaviour in regard to foodstuffs and other products as well as brand loyalty. In this report, you will find a synthesis of the main insights of the study.

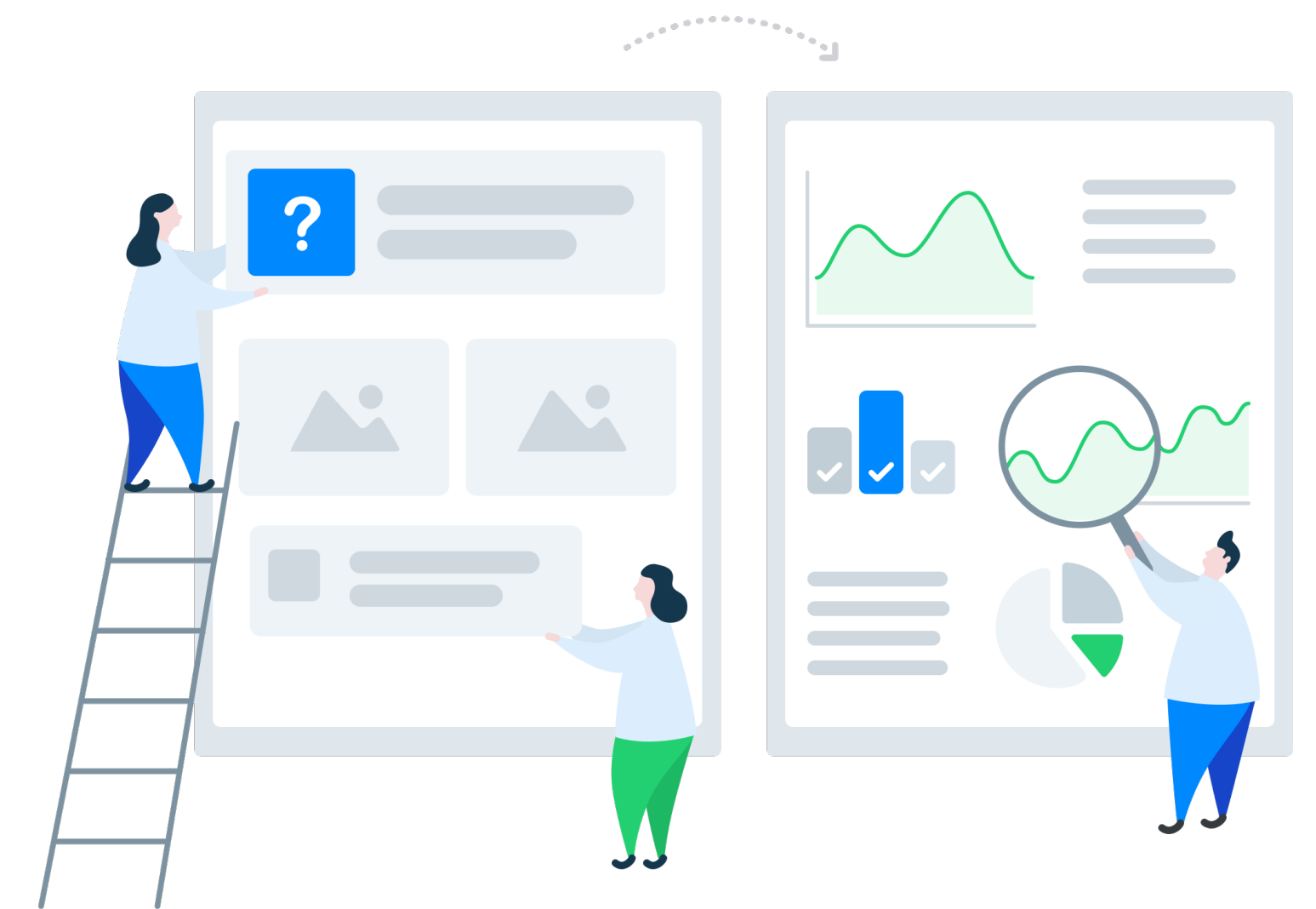
You can see all the data and additional filter options (e.g. sociodemographic criteria) in real-time at business.appinio.com.

Agenda

1	Study design & sample	p. 04
2	Summary	p. 08
3	News, concerns & satisfaction	p. 11
4	Distancing & safety	p. 16
5	Buying behaviour	p. 20
6	Panic buying	p. 31
7	Brand loyalty	p. 33
8	Ads related to coronavirus	p. 35



1 Study design & sample



Access to the study and the data

Real-time access to the whole study and all the answers on the Appinio analyzer dashboard

Step 1:
Create a free account at
business.appinio.com

appinio

Create a new account

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Email Address

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Imprint

Step 2:
Under “Appinio Studies” you’ll find the
“Consumer study: Coronavirus”
– click on “Go to analysis”

Appinio Studies

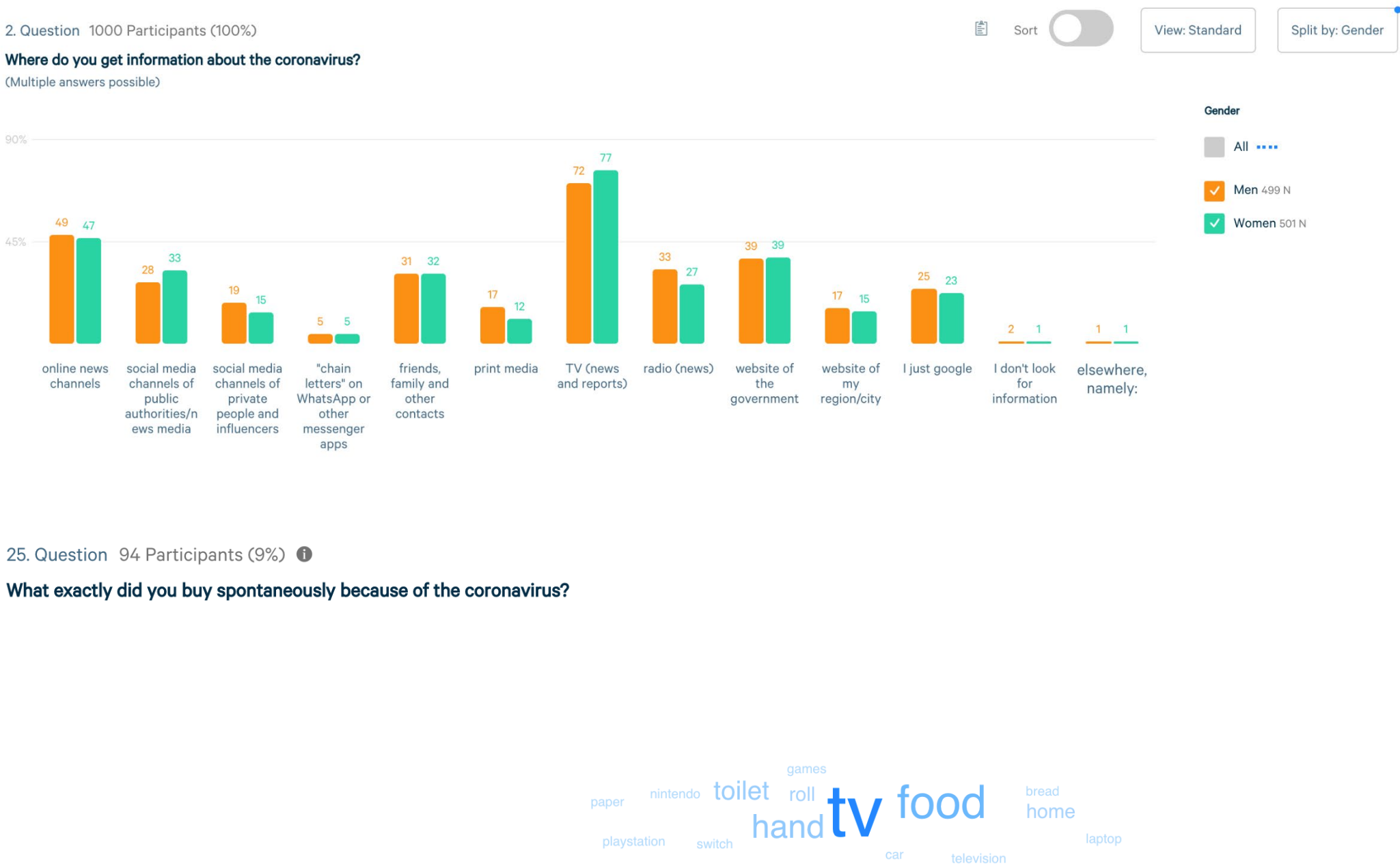


Consumer study Coronavirus...

Participants	Questions	Create Date
1000	35	20.03.2020

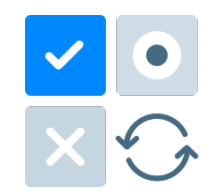
Go to Analysis

Step 3:
Analyse, filter or download the results in real-time in your Appinio dashboard
(e.g. filter by sociodemographic criteria)



Study design

Data collection, sample, content



Method & Data collection

- Mobile questionnaire, send out through the Appinio app
- 34 questions
- Field time: 20th – 23rd March 2020
- **Data can be accessed, filtered and downloaded at business.appinio.com**



Sample

- N = 1,000 people in the UK
- 16-65 years old
- representative at the national level with regard to age and gender

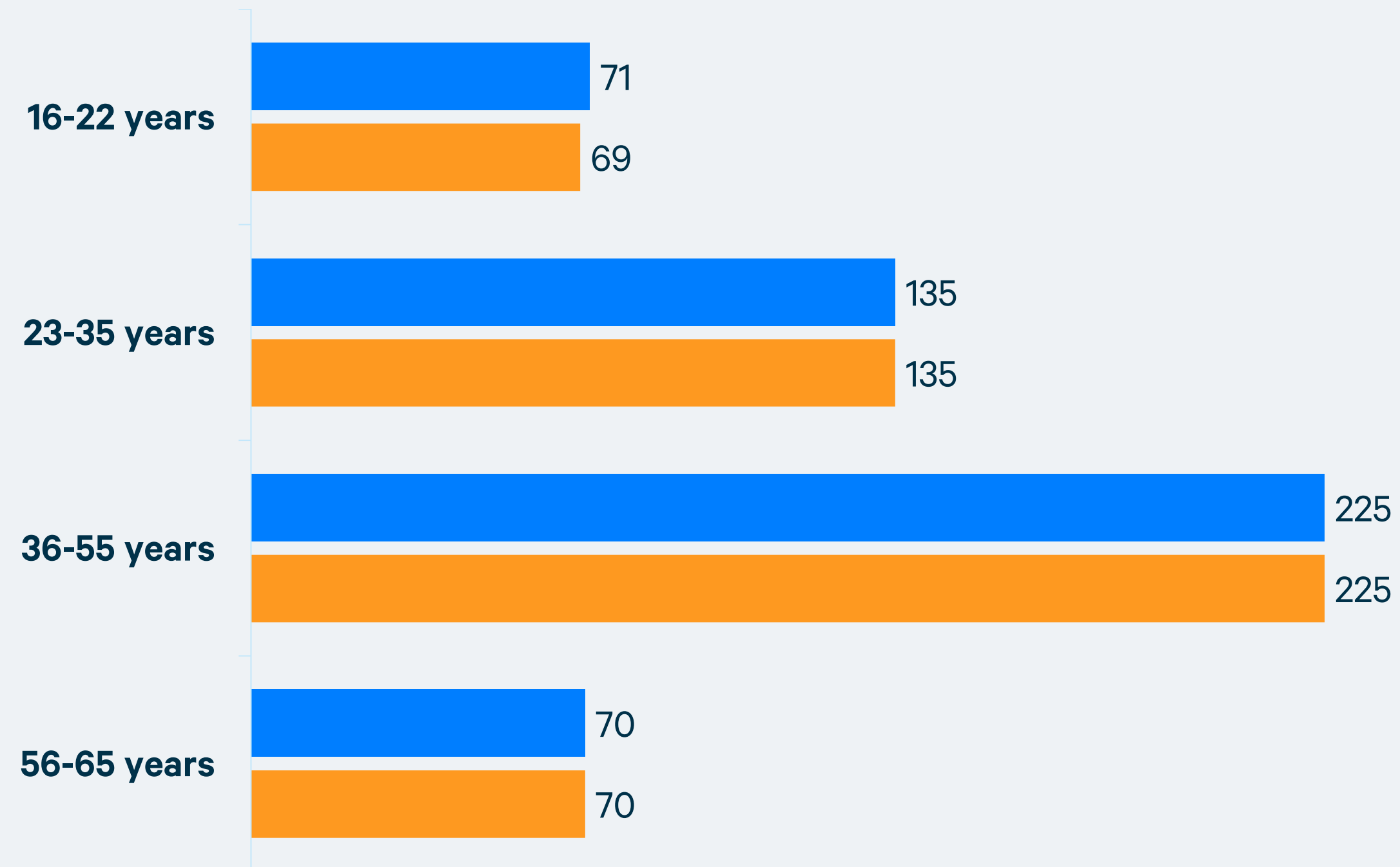


Content

- Information channels for news about coronavirus
- Main concerns around the virus
- Life satisfaction
- Preventive measures
- Changes in leisure activities
- Changes in consumption
- Panic buying
- Brand loyalty
- Ads related to coronavirus

Sample composition

age & gender



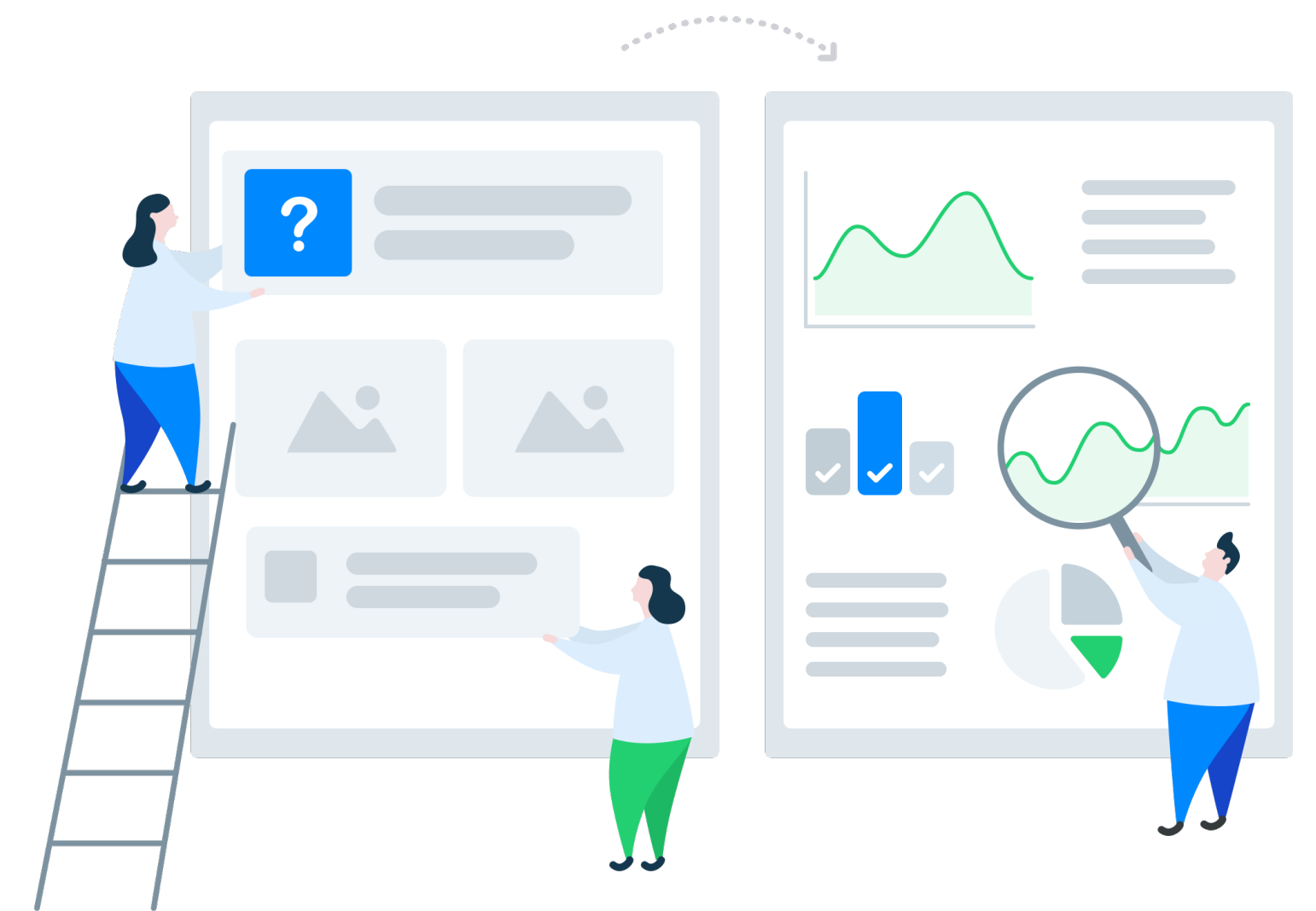
Men (N=499)



Women (N=501)

Ø Age 38.6 years

2 Summary



Summary (1/2)



Information channels

- 99% of the Brits are getting information about coronavirus through at least one news channel. Most Brits are getting information on TV (75%), online news channels (48%) and the government website (39%). These channels are also the ones rated as the most trustworthy by the majority of the respondents. However, the share of people using the government website is relatively low considering that this channel is rated among the most trustworthy by 61% of the respondents.
- The next most popular information channels are friends & family (32%), social media profiles of public authorities and the radio (30-31 %) whereby radio news are much more often perceived as trustworthy than friends & family and social media (32% vs. 16%). The least used channel is “chain letters” on WhatsApp or other messenger apps (5%)



Concerns

- The biggest concerns among the Brits with regard to coronavirus are the risk of infection for family & friends (55%), a possible mass panic (39%) and the risk of infection for oneself (37%).
- Right after these three biggest concerns is the fear of long-term economic and personal financial consequences (36% & 33%)
- Overall, 70% of the population are at least a little bit worried about their own health due to coronavirus. In Germany, that number is slightly lower (63%).



Life satisfaction

- The Brits have different levels of satisfaction in different areas of their lives. They are most satisfied with things regarding entertainment (3.88/6), nutrition (3.67/6) and relationships/dates (3.66/6).
- They are by far least satisfied in the area of vacation/travel (2.86/6).
- Satisfaction for the different areas of life is comparatively low in the UK. While Germans reach an average level of satisfaction of 4.17/6 in the area of nutrition for example, the Brits don't go beyond an average of 3.9/6 in any of the covered areas.



Preventive measures to decrease the risk of infection

- Only 3% of the Brits say that they aren't doing anything specific to decrease the risk of infection for themselves and others.
- The most common preventive measures are washing hands more often (78%), avoiding crowds (72%) and using hand sanitizer/ antibacterial gels or sprays more often (59%).
- 84% of the respondents say that they are leaving the house less often than before coronavirus – 39% of the British employees say that they are working from home at the moment.
- Airplanes (85%), subways (84%) and ferries (81%) are the means of transportation that are most often rated as (completely) unsafe in regard to coronavirus and a risk of infection.
- The safest means of transportation are private cars (46%), walking (35%) and biking (36%)

Summary (2/2)



Leisure activities

- 84% of the Brits are leaving the house less often than before coronavirus. At home, many are using the time to watch more TV (56% are doing this (much) more often than before), to play more video games (29%), to stream more movies and series (e.g. on Netflix) (45%) or to listen to more audio books and podcasts (41%)
- A lot of Brits are also spending more time online (49%) or specifically on social media (41%)
- Other things Brits do more often than usual: playing board games (22%), reading books (32%), workout at home (20%) or talking on the phone (40%).



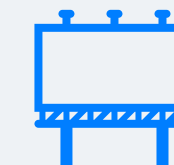
Buying behaviour

- Many Brits are buying more foodstuffs than usual such as pasta (27% buy this more than before coronavirus), preserves (33%), frozen foods (28%) as well as ready-made meals (23%). They are also buying more non-food products like antibacterial gels or hand sanitizer (33%), soap (32%), toilet paper (27%) or tissues (23%)
- On the other hand, fresh foodstuffs like fish (23%) or plant-based cheese or yoghurt (21%) as well as products such as alcohol (23%) or clothing items (26%) are bought less than before coronavirus.



Panic buying / hoarding / pre-stocking

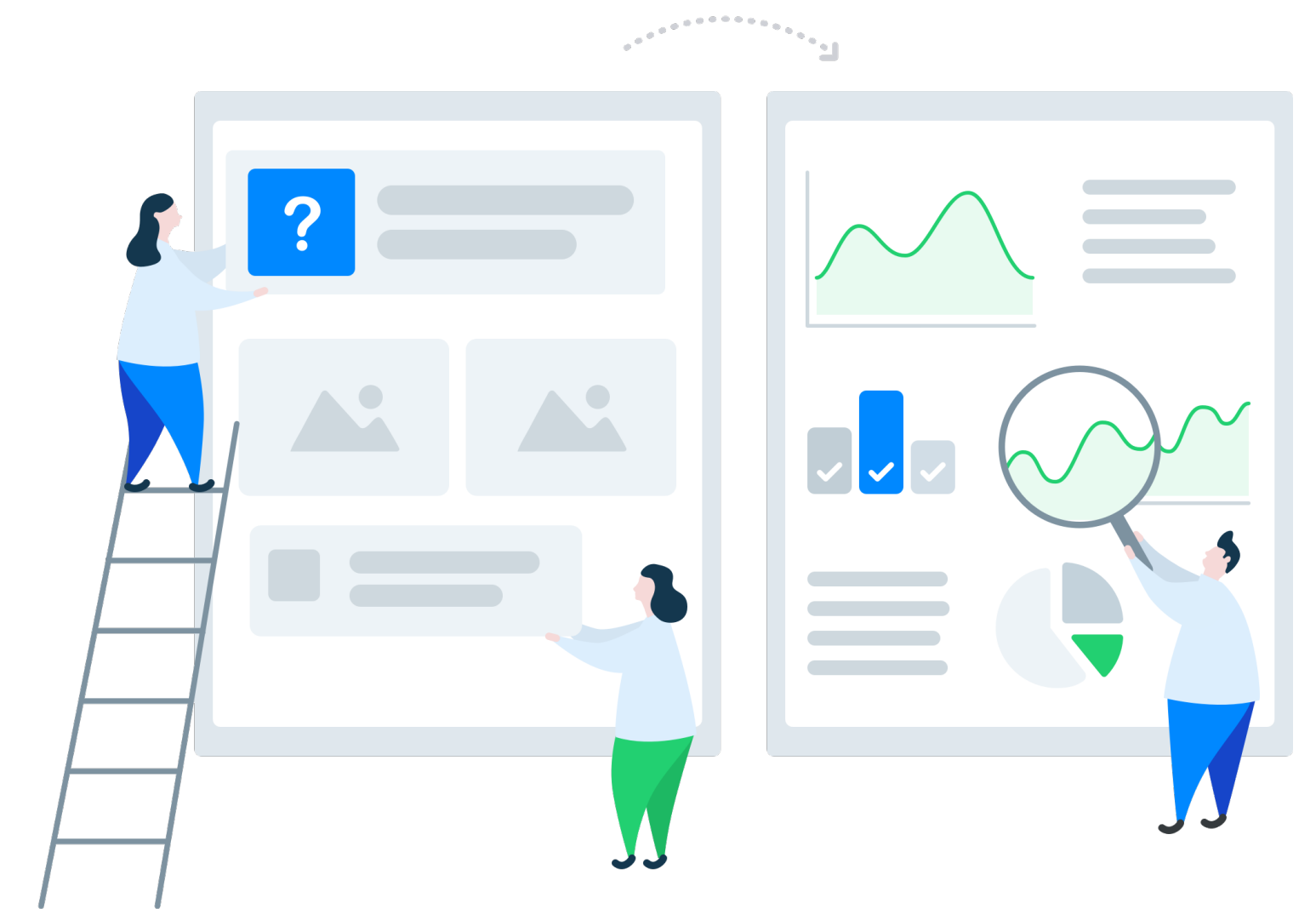
- 40% have done some pre-stockings or are planning to do so.
- More than half of those (63%) have stocks that would last at least 10 days. 30% have stocks that would last more than 2 weeks.
- 16% of the respondents say that they have already encountered conflict-charged situations while doing groceries during times of coronavirus. 13% have experienced multiple of those situations.



Brand loyalty and advertising related to coronavirus

- 79% of the respondents (N = 791) say that a specific brand product wasn't available (in stock) at their supermarket / drug store anymore. They reacted in the following way:
 - 37% bought a similar product from a different brand
 - 30% bought the product at a different store
 - 30% bought a different product instead (e.g. rice instead of pasta)
 - 18% bought the product online instead
- 34% indicate that they have already seen an advertisement related to coronavirus (younger respondents are more likely to have seen one)

3 News channels, concerns & life satisfaction



Which channels do the Brits use? Which ones do they trust?

News channels: Usage & trustworthiness

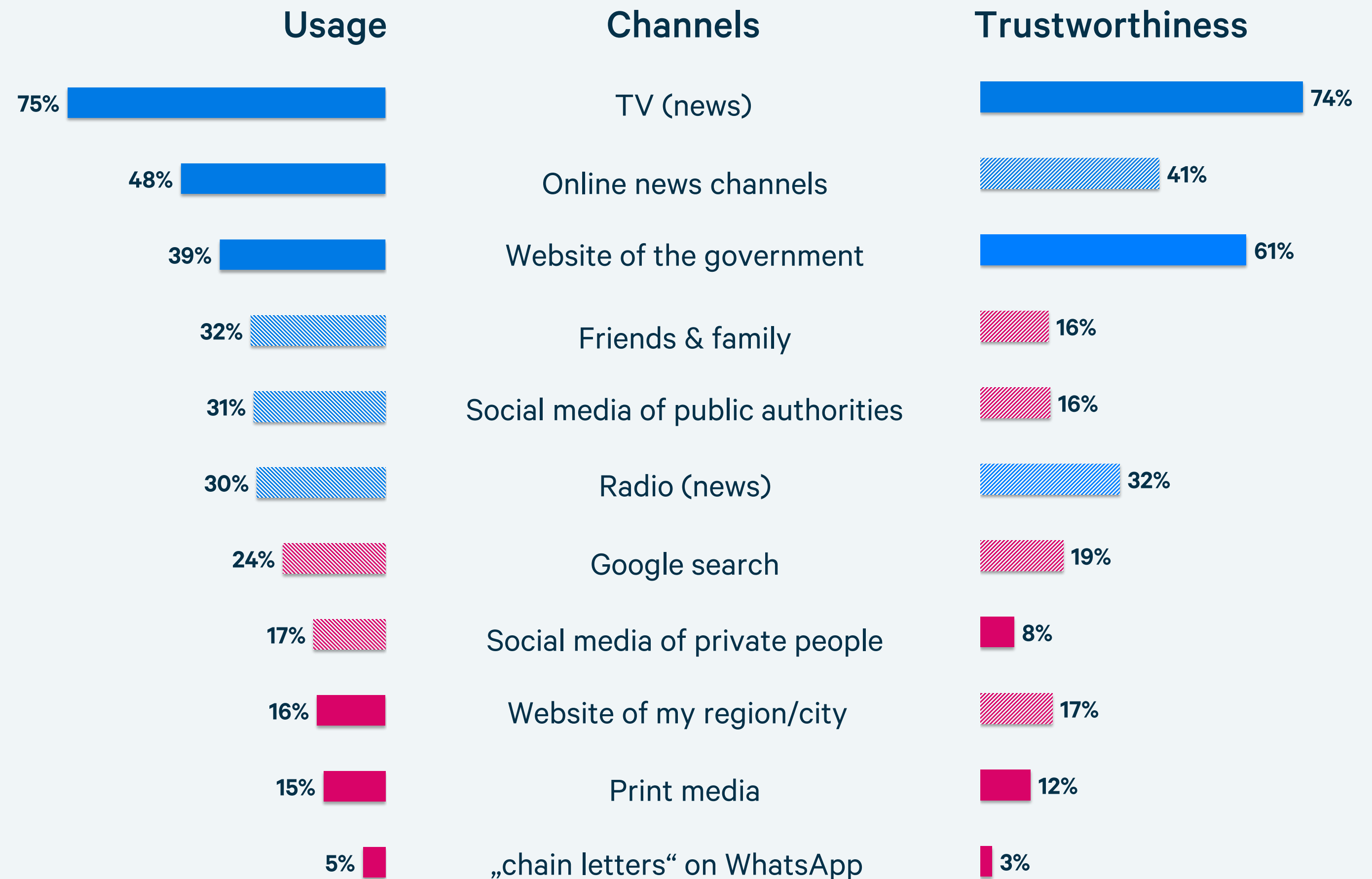
99% of the Brits are getting information about coronavirus through at least one news channel. Most Brits are **getting information** on **TV** (75%), **online news channels** (48%) and the **government website** (39%). These channels are also the ones that are rated as the most trustworthy by the majority of the respondents. However, the share of people using the government website is relatively low considering that it is rated among the most trustworthy by 61% of the respondents.

The next most popular information channels are friends & family (32%), social media profiles of public authorities and the radio (30-31%) whereby radio news are much more often perceived as trustworthy than friends & family and social media (32% vs. 16%).

The least used channel is “chain letters” on WhatsApp or other messenger apps (5%).

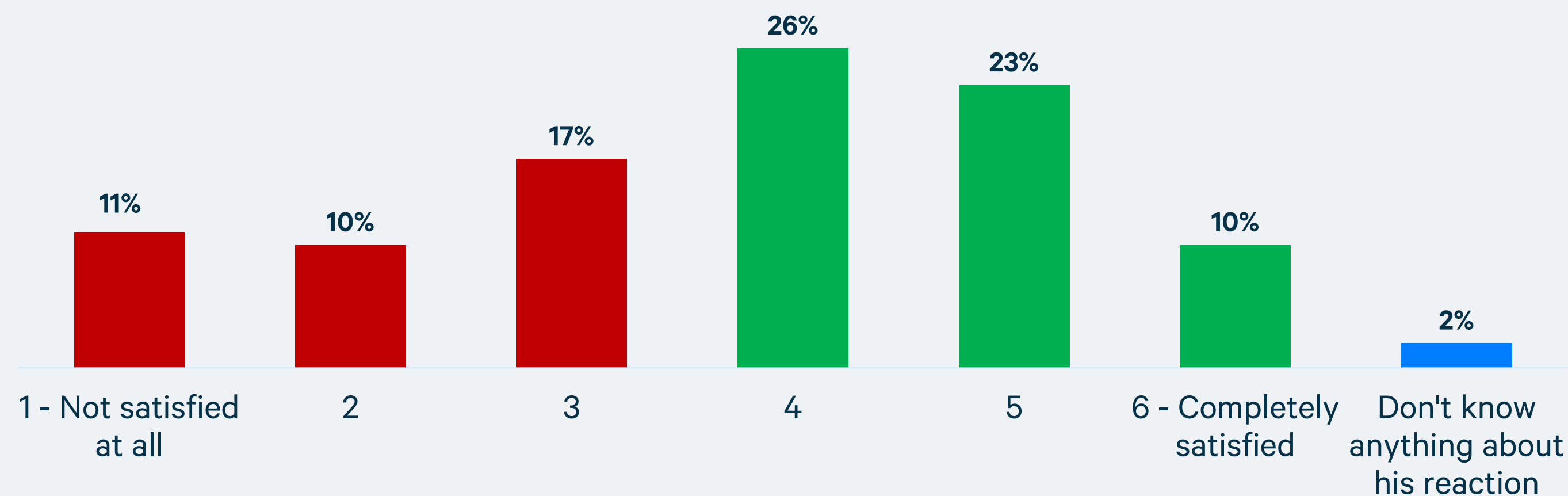
It’s striking that compared to the German population, Brits are more likely to rate social media of private people (4% vs. 8%), the website of the government (42% vs. 61%) and google searches (14% vs. 19%) as most trustworthy.

On the other hand, they are less likely to rate social media of public authorities (19% vs. 16%), the website of their region/city (38% vs. 17%) and radio news (41% vs. 32%) as most trustworthy.



How satisfied are Brits with the actions of Prime Minister Boris Johnson with regard to coronavirus?

Satisfaction with actions of Boris Johnson (6-point scale) – total sample



2% of the Brits claim that they don't know anything about his actions



59% are satisfied with his actions with regard to coronavirus

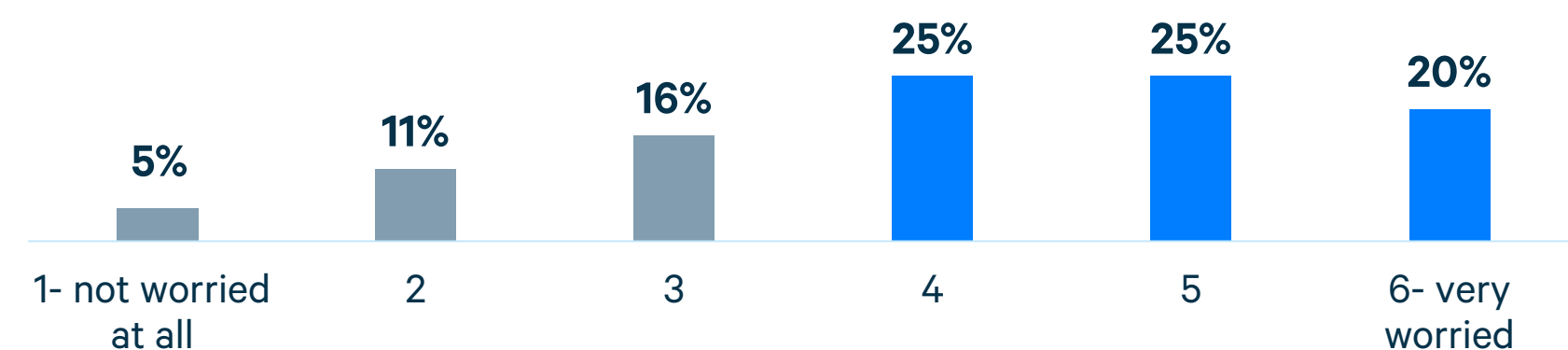


38% are unsatisfied with his actions with regard to coronavirus

How concerned are the Brits? – What are the main concerns?

Concerns about the coronavirus – total sample

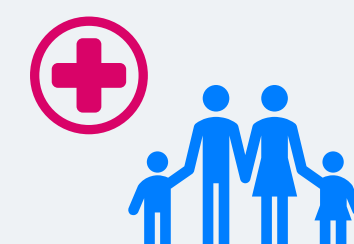
Worries about personal health



Brits are on average “rather worried” about their own health because of coronavirus. 70% say that they are (rather/very) worried about their health. Concerns are increasing with age:

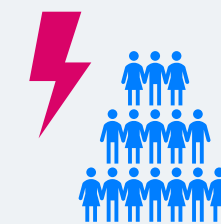
Ø Total	4,14 (SD = 1,4)
Ø 16-22 years	3,32 (SD = 1,3)
Ø 23-35 years	3,96 (SD = 1,4)
Ø 36-55 years	4,48 (SD = 1,3)
Ø 56-65 years	4,24 (SD = 1,4)

Main concerns



55%

Risk of infection for friends and family



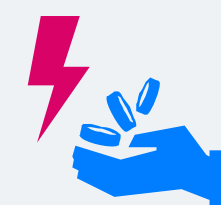
39%

Mass panic



37%

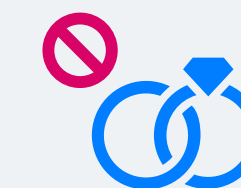
Risk of infection for myself



36%

Long-term economic consequences (e.g. insolvency of companies)

Least important concerns



9%

Ban for private events (e.g. weddings)



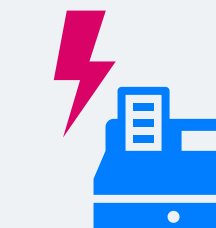
14%

Reduced travel options (e.g. cancelled flights)



16%

Long-term “extinction” of gastronomy & culture (restaurants/museums closing bc. of foregone income)



19%

Short-term economic consequences (restricted trade, longer delivery times etc.)

Only 1% of the Brits don't have any concerns linked to the virus

Consumer study: Coronavirus

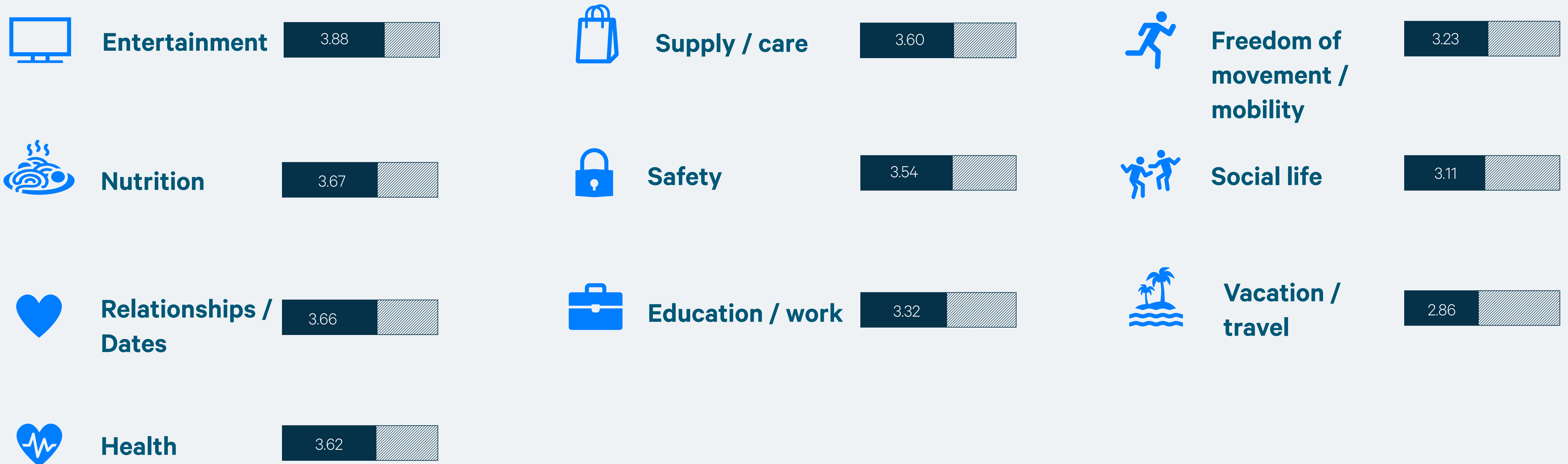
14

“To what extent are you worried about your own health because of coronavirus? // “What are your five biggest concerns in regard to coronavirus (no matter if they are already occurring or if they might happen in the future)?

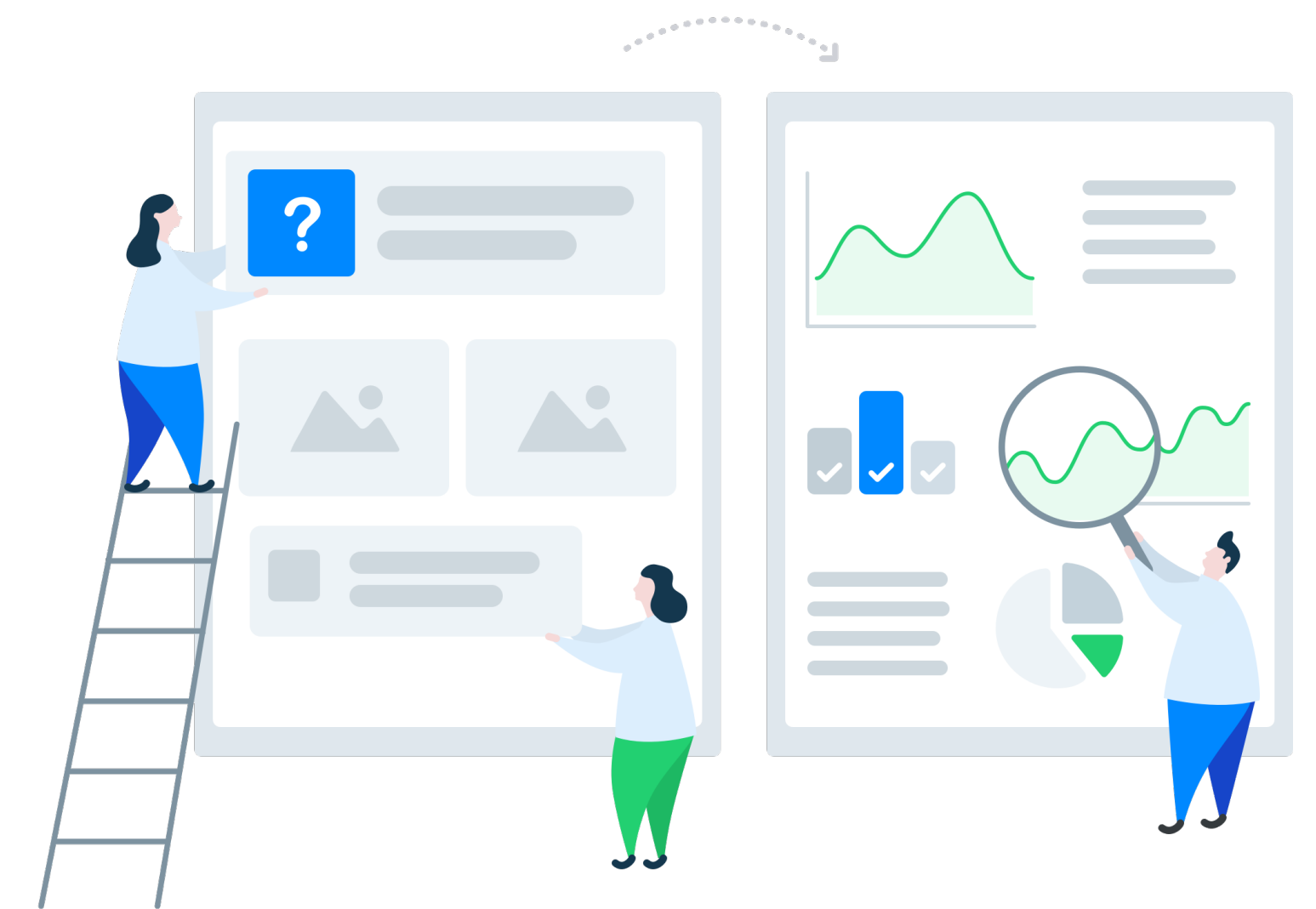
(Total: N=1,000)

How satisfied are Brits at the moment?

Satisfaction in different areas of life (6-point scale) – total sample



4 Measures for avoidance & safety



What do the Brits do in order to decrease the risk of infection?

Measures to reduce the risk of infection for oneself and others – total sample

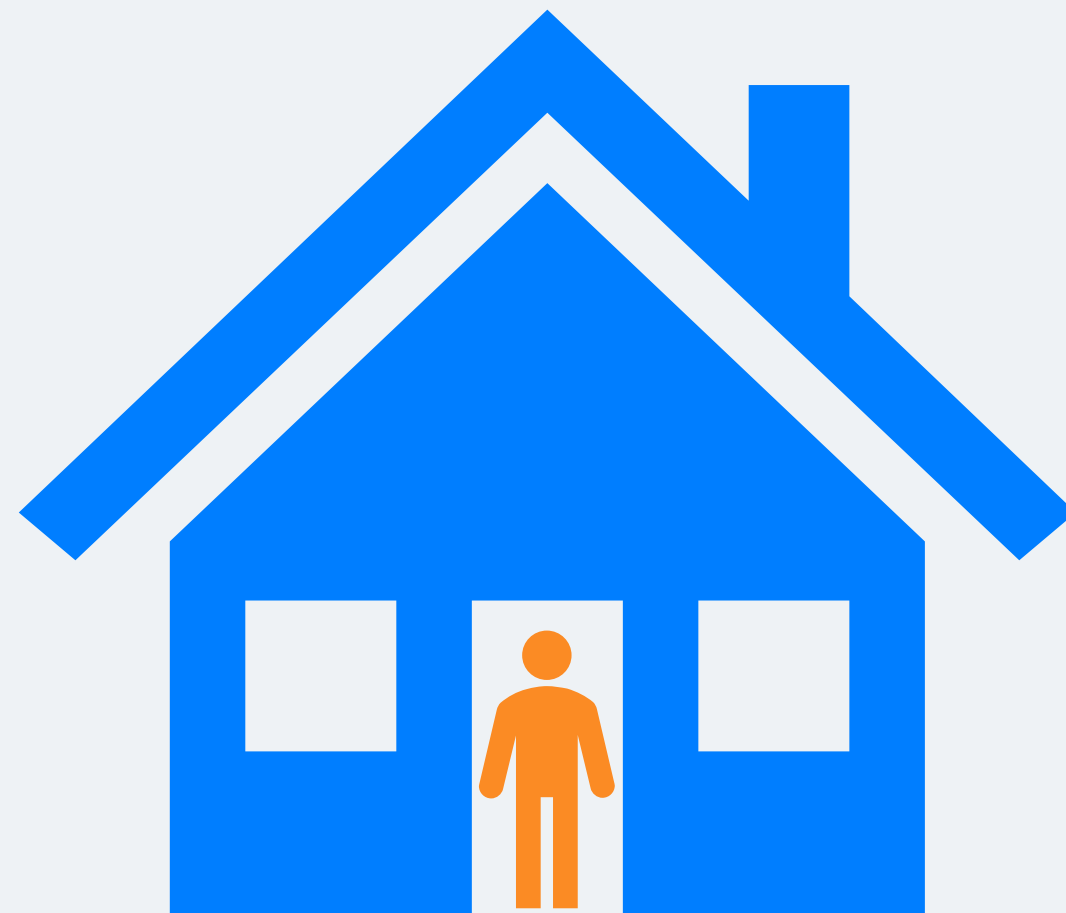


Only 3% of the Brits are not doing anything in order to decrease the risk of infection

What do the Brits do in order to decrease the number of infections?

Stay at home & work from home

84%



of the Brits are spending more of their leisure time at home than usual

8%

of these people are officially quarantined

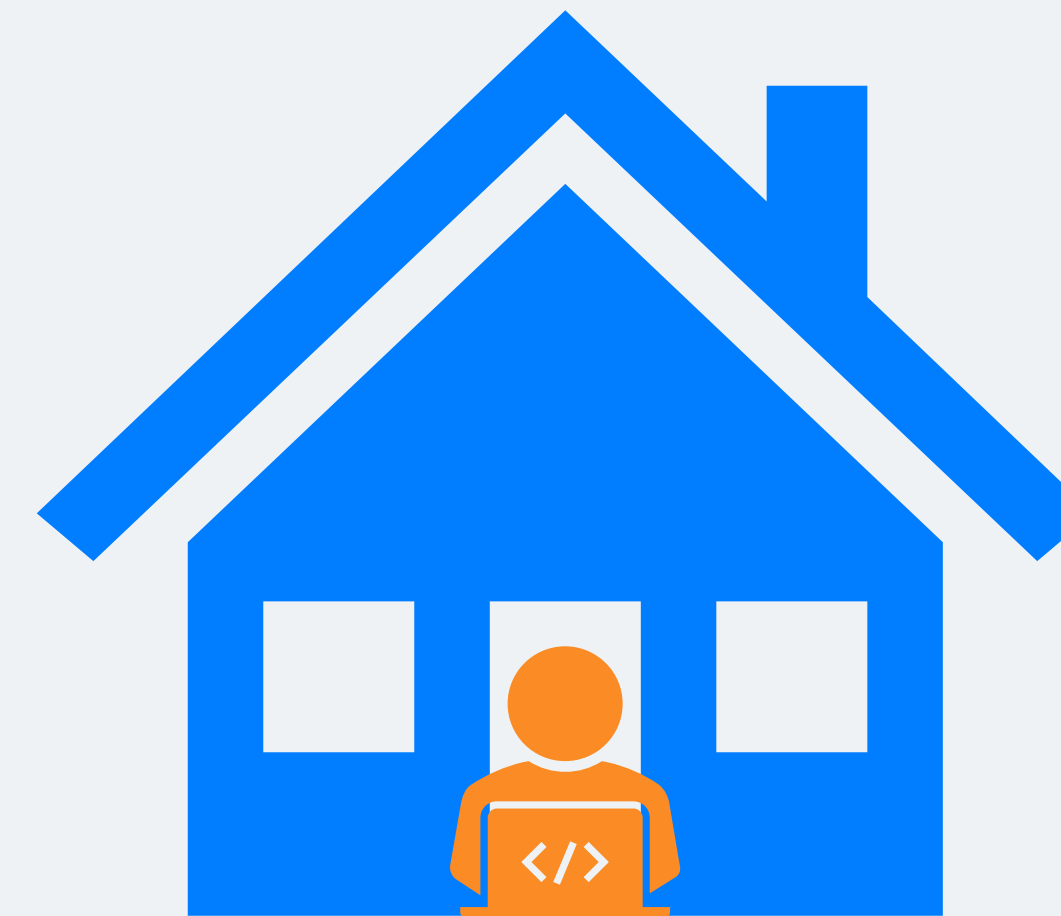
43%

of them have put themselves in self-quarantine

49%

of them are simply leaving the house less often

39%



of the British working population are working from home

30%

of the employees have a job where working from home is not an option (e.g. gastronomy, care professions)

18%

of the employees could potentially work from home but aren't allowed to

6%

of the employees could work from home but aren't doing it

Risk of infection in different means of transport?

Safety level of different means of transport in regard to the coronavirus – total sample top 2 & bottom 2 (6-point scale)

Least safe means of transport



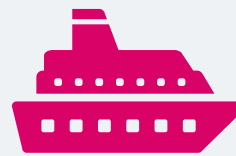
85%

rate flights as (completely) unsafe with regard to coronavirus



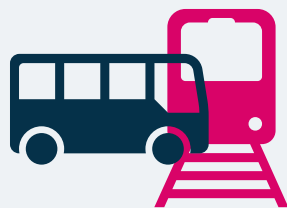
84%

rate subways / city trains as (completely) unsafe with regard to coronavirus



81%

rate ferries / ships as (completely) unsafe with regard to coronavirus



79%

rate busses & (regional) trains as (completely) unsafe with regard to coronavirus



74%

rate carsharing & ridesharing as (completely) unsafe with regard to coronavirus



67%

rate scooter sharing as (completely) unsafe with regard to coronavirus



66%

rate cabs / taxis as (completely) unsafe with regard to coronavirus



62%

rate bike sharing as (completely) unsafe with regard to coronavirus

Safest means of transport



46%

rate private cars as (completely) safe with regard to coronavirus



36%

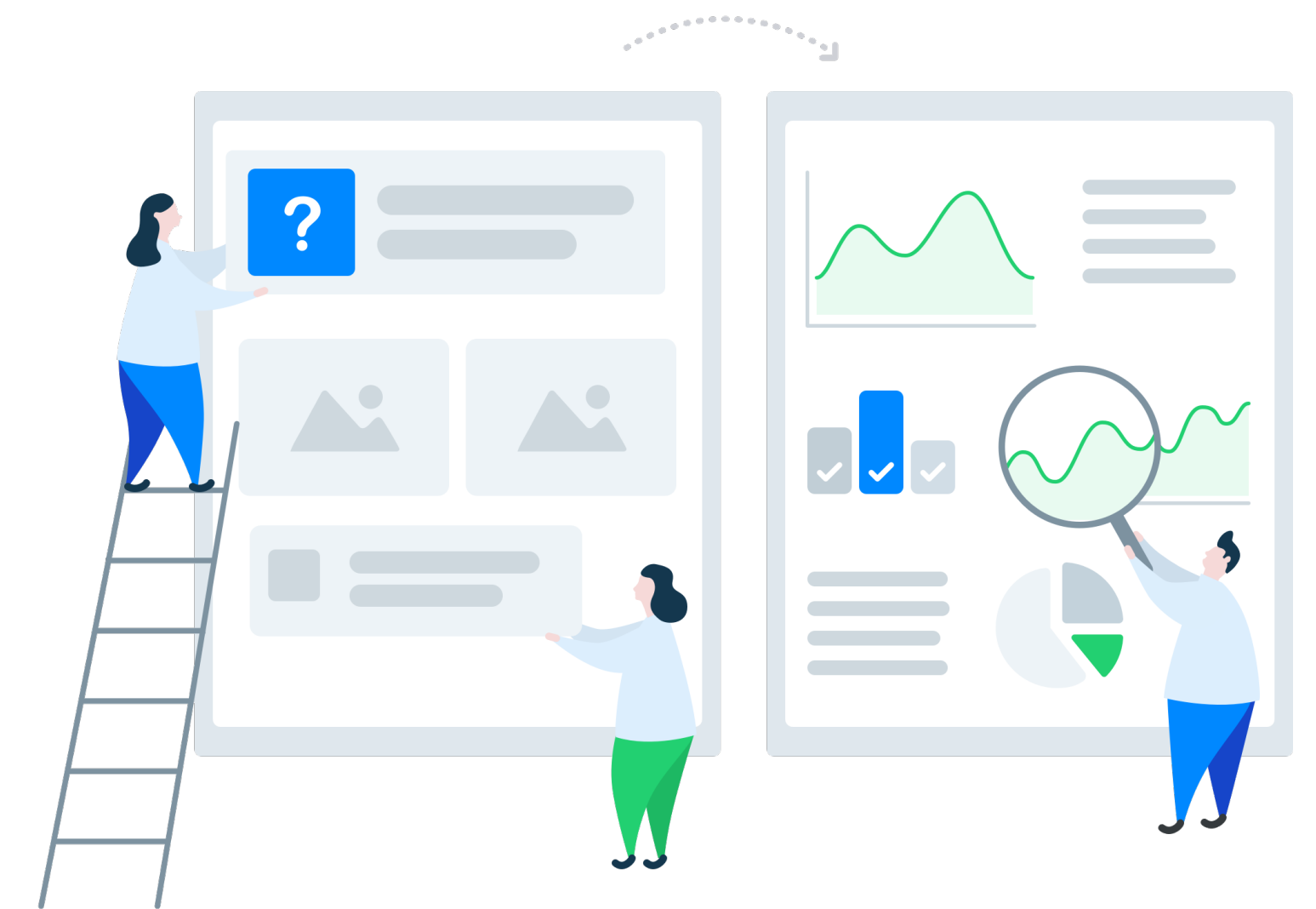
rate bikes / cycling as (completely) safe with regard to coronavirus



35%

rate walking as (completely) safe with regard to coronavirus

5 Leisure activities & buying behaviour



What do Brits do more than usual at the moment?

Frequency of leisure activities – total sample / top 2 (5-point scale)



— = X% of the respondents do that (much) less than before coronavirus

+ = X% of the respondents do that (much) more than before coronavirus

What do Brits do less than usual at the moment?

Frequency of leisure activities – total sample / bottom 2 (5-point scale)

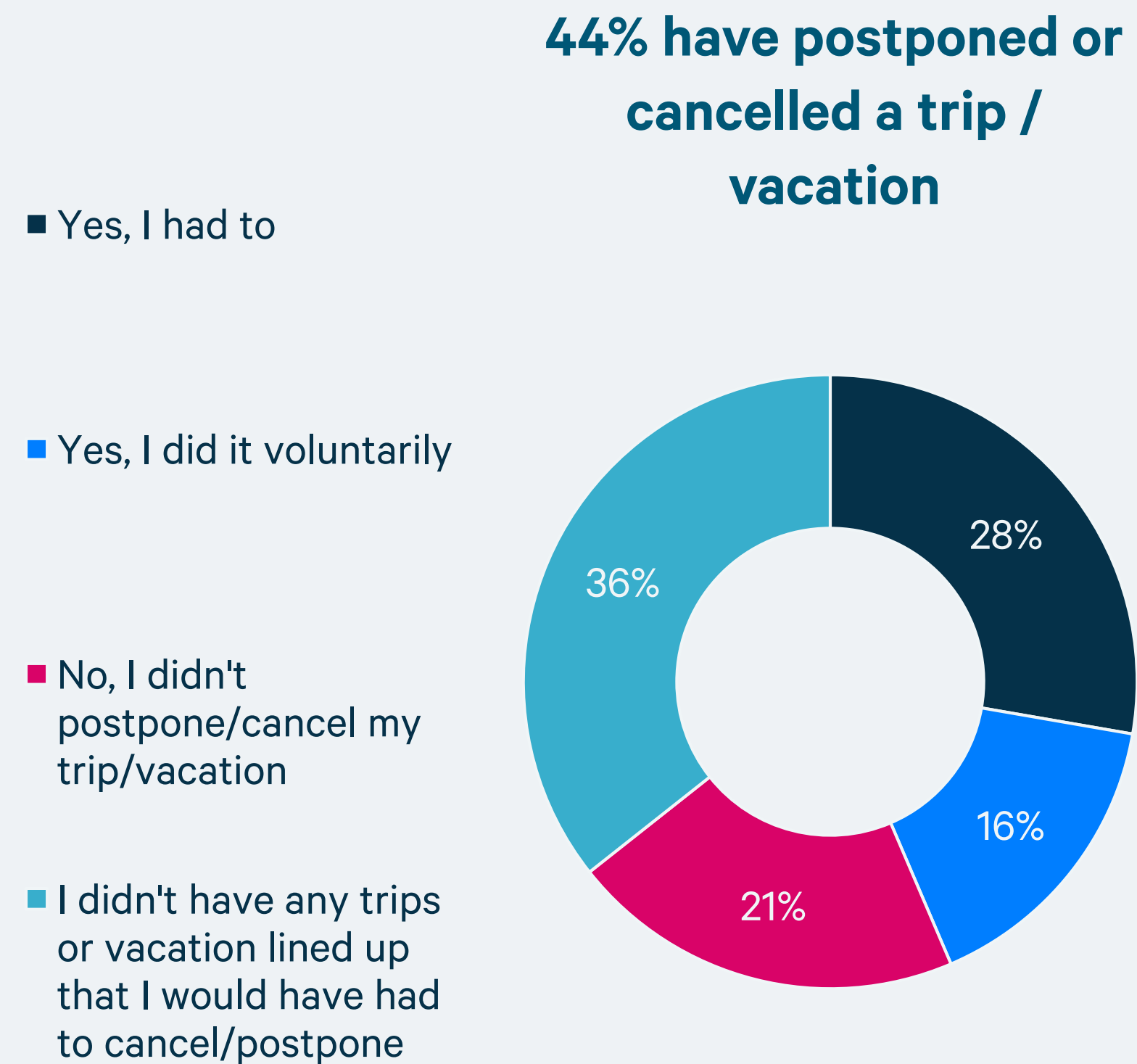


— = X% of the respondents do that (much) less than before coronavirus

+ = X% of the respondents do that (much) more than before coronavirus

Were trips cancelled/postponed?

Travelling in times of coronavirus – total sample



68% of those who had planned a vacation or a trip (N = 643 // 64%) cancelled or postponed it.

36% of those did so voluntarily, the other 64% were forced to cancel or postpone.

The remaining 32% didn't change their plans.

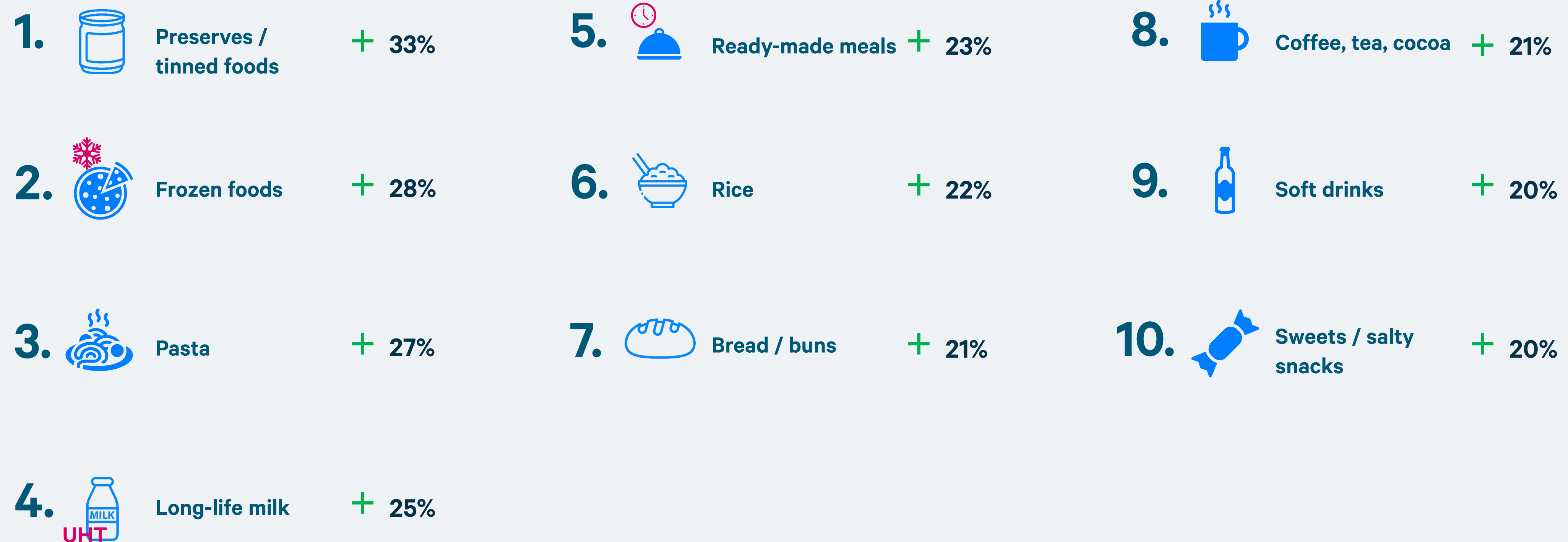
How did the buying behaviour change online and offline?

Buying behaviour online/offline – total sample



Which foodstuffs are bought more than before?

Buying behaviour foodstuffs – total sample / top 2 (5-point scale)



— = X% of the respondents are buying this (much) less than before coronavirus
+ = X% of the respondents are buying this (much) more than before coronavirus

Which household supplies are bought more than before?

Buying behaviour household supplies – total sample / top 2 (5-point scale)




— = X% of the respondents are buying this (much) less than before coronavirus
+ = X% of the respondents are buying this (much) more than before coronavirus

Which products are bought less than before?

Buying behaviour – total sample / bottom 2 (5-point scale)

1.  Furniture — 27%

5.  Fresh fish / sea food — 23%

8.  Plant based yoghurt — 21%

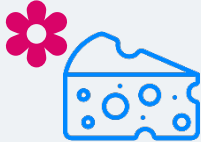
2.  Clothing / shoes — 26%


6.  Alcohol — 23%

9.  Board games — 21%

3.  Household appliances (e.g. vacuum cleaner) — 25%

7.  Magazines — 21%

10.  Plant based cheese / cream cheese — 21%

4.  Stationary / office supplies (e.g. notepads) — 24%

— = X% of the respondents are buying this (much) less than before coronavirus

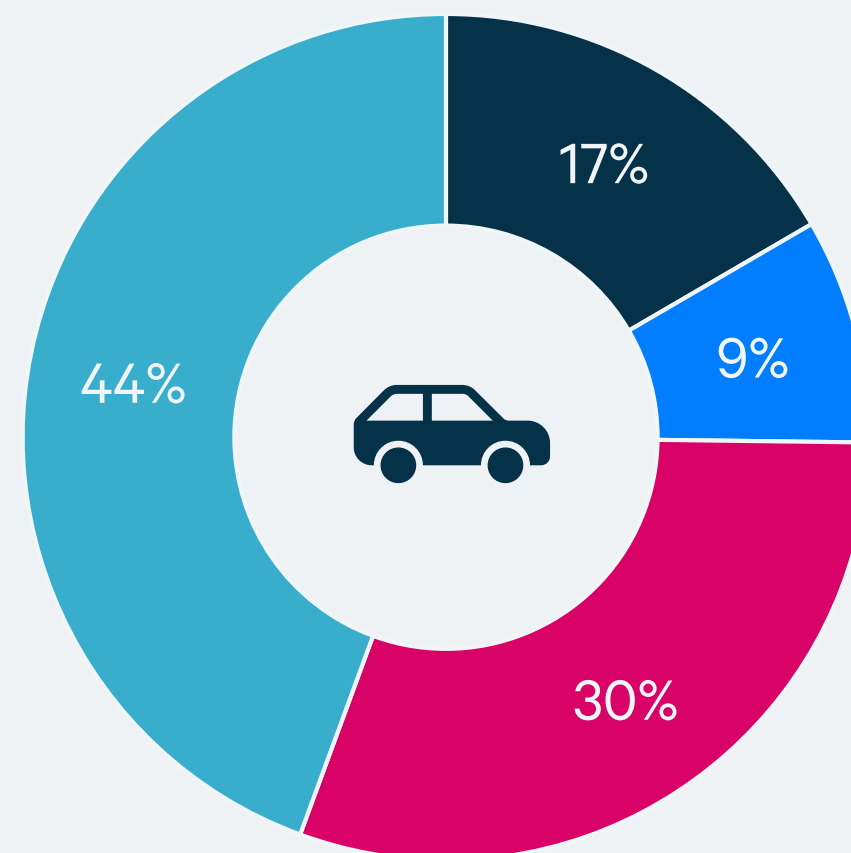
+ = X% of the respondents are buying this (much) more than before coronavirus

Were big purchases postponed? – Which ones?

Big purchases postponed because of coronavirus – total sample

26% postponed a big purchase because of coronavirus

- Yes, I postponed them for an indefinite period
- Yes, I postponed them for a couple of weeks
- No, I didn't postpone any big purchases
- Wasn't planning on making a big purchase anyway



**Which purchases were postponed?
(Top 5 answers)**

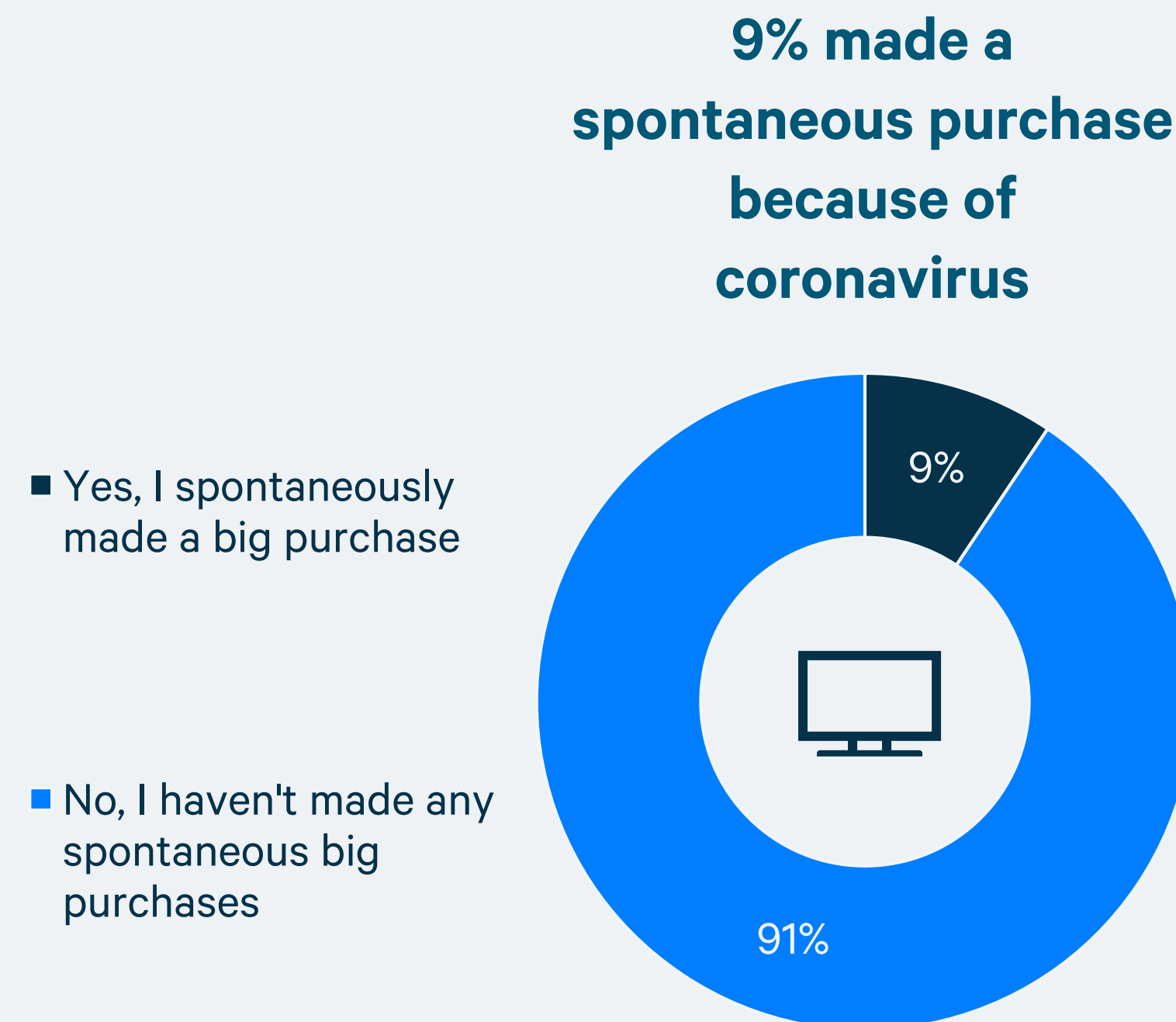
1. Car
2. TV
3. Vacation / Holiday
4. Furniture

“A Car, but need to save money now for stocks with uncertainty how long this will last” (m, 26)

“I was considering getting a new TV, laptop and/or car this year, but I'll just keep using my old ones for now. Can't justify any big expenditures like that.” (m, 28)

Were purchases made spontaneously? – Which ones?

Spontaneous purchases because of coronavirus – total sample



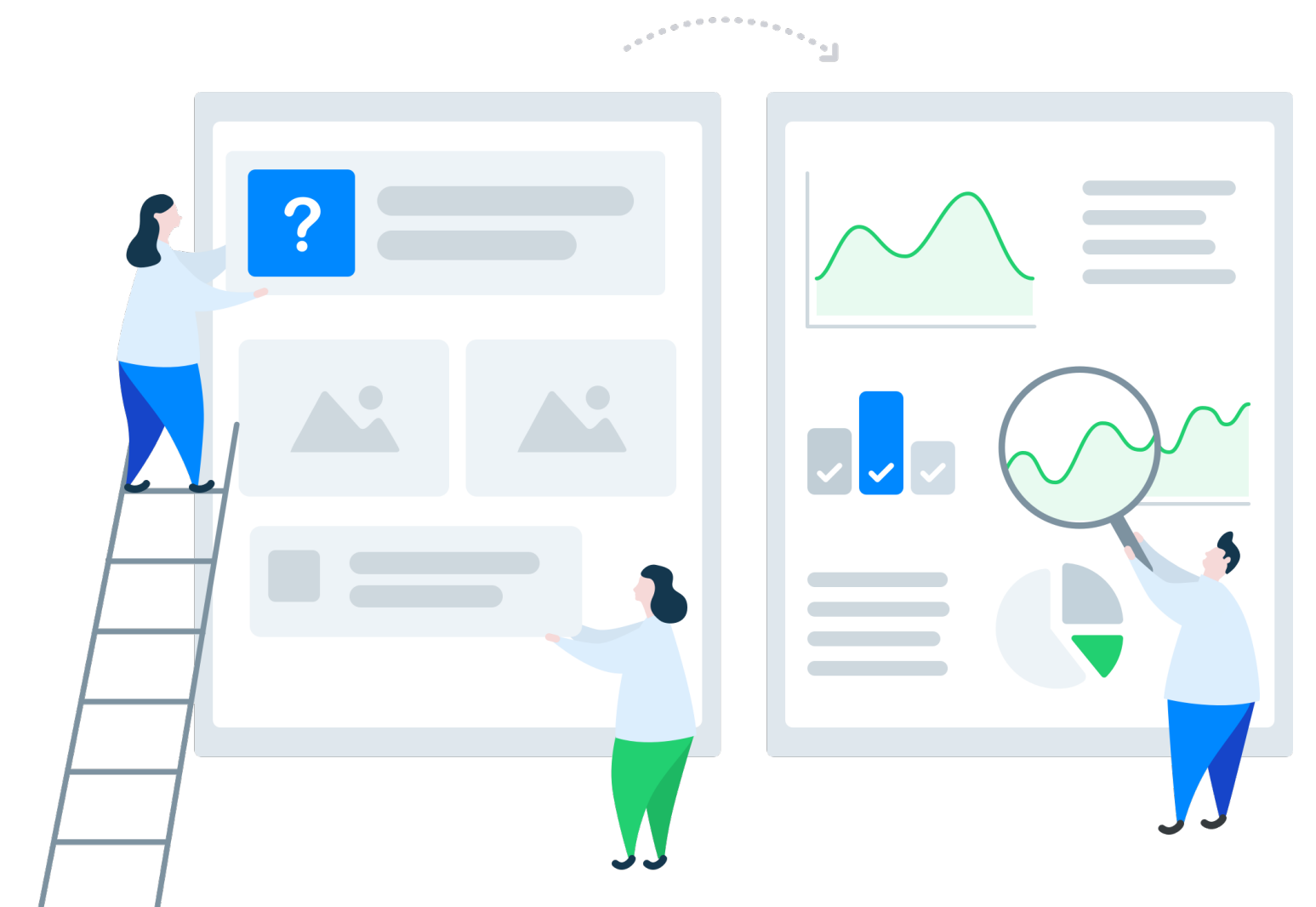
Which purchases were made? (Top open answers)

1. TV
2. Gaming console / equipment
3. Gaming console / equipment
4. Electronics

“New TV and PS3.” (f, 25)

“Laptop for my daughters to do their school work.”
(m, 42)

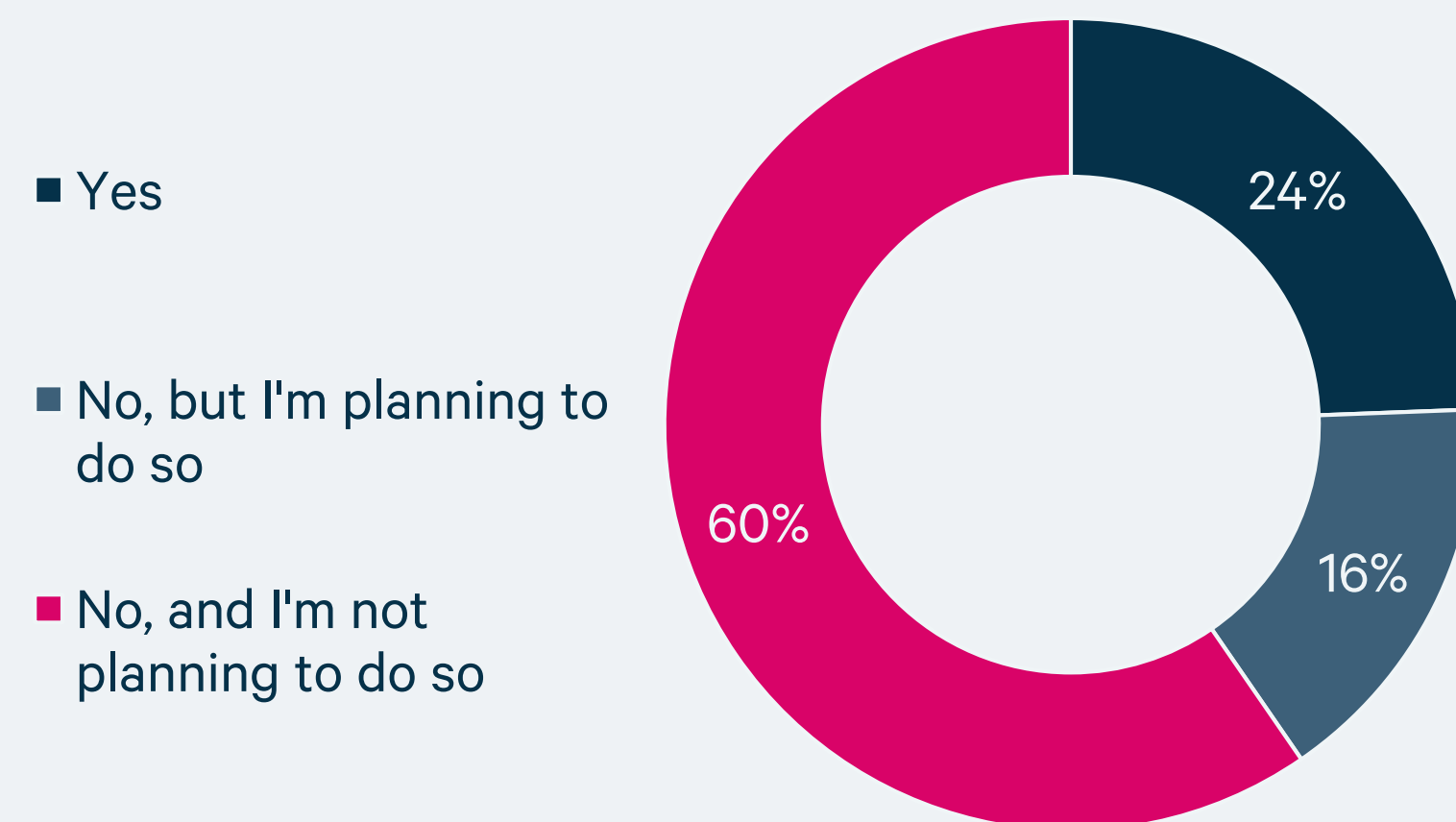
6 Panic buying



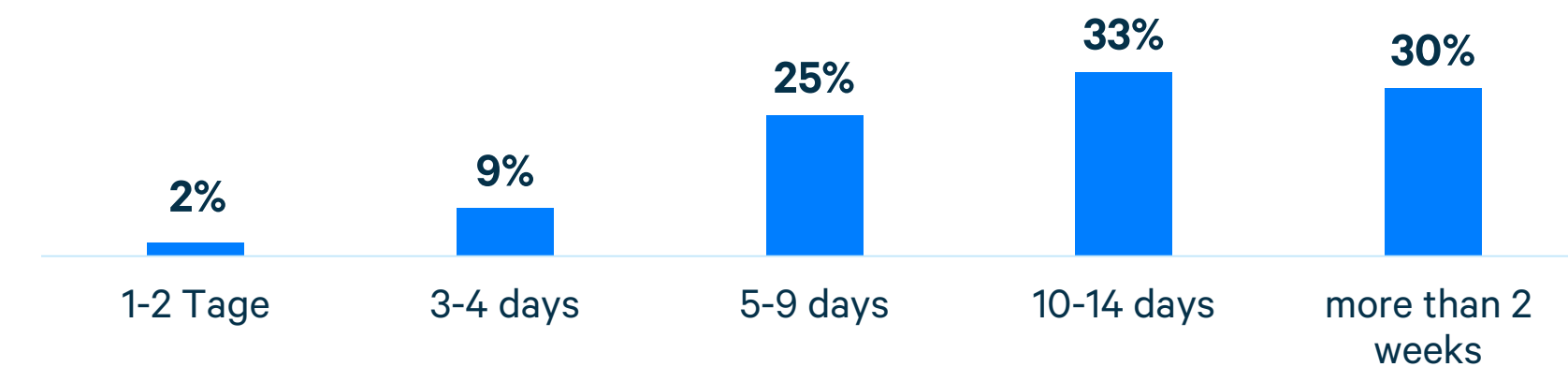
Are people panic buying / hoarding?

Pre-stocking because of coronavirus – total sample

40% have done some pre-stocking or are planning to do so



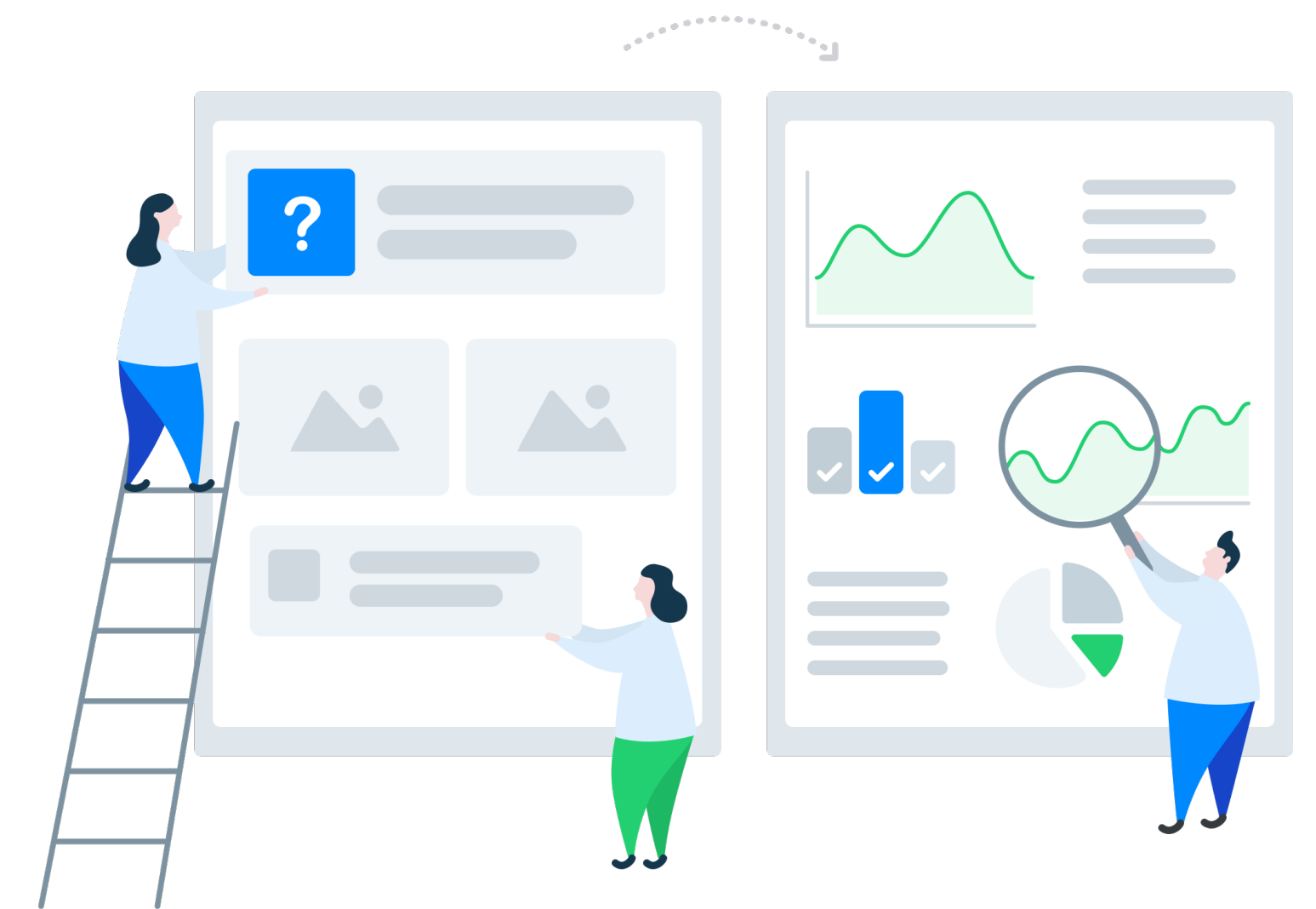
Amount of days the stocks would last



Almost two thirds (63%) of the participants that stocked up on supplies, have built up stocks that last for at least 10 days.

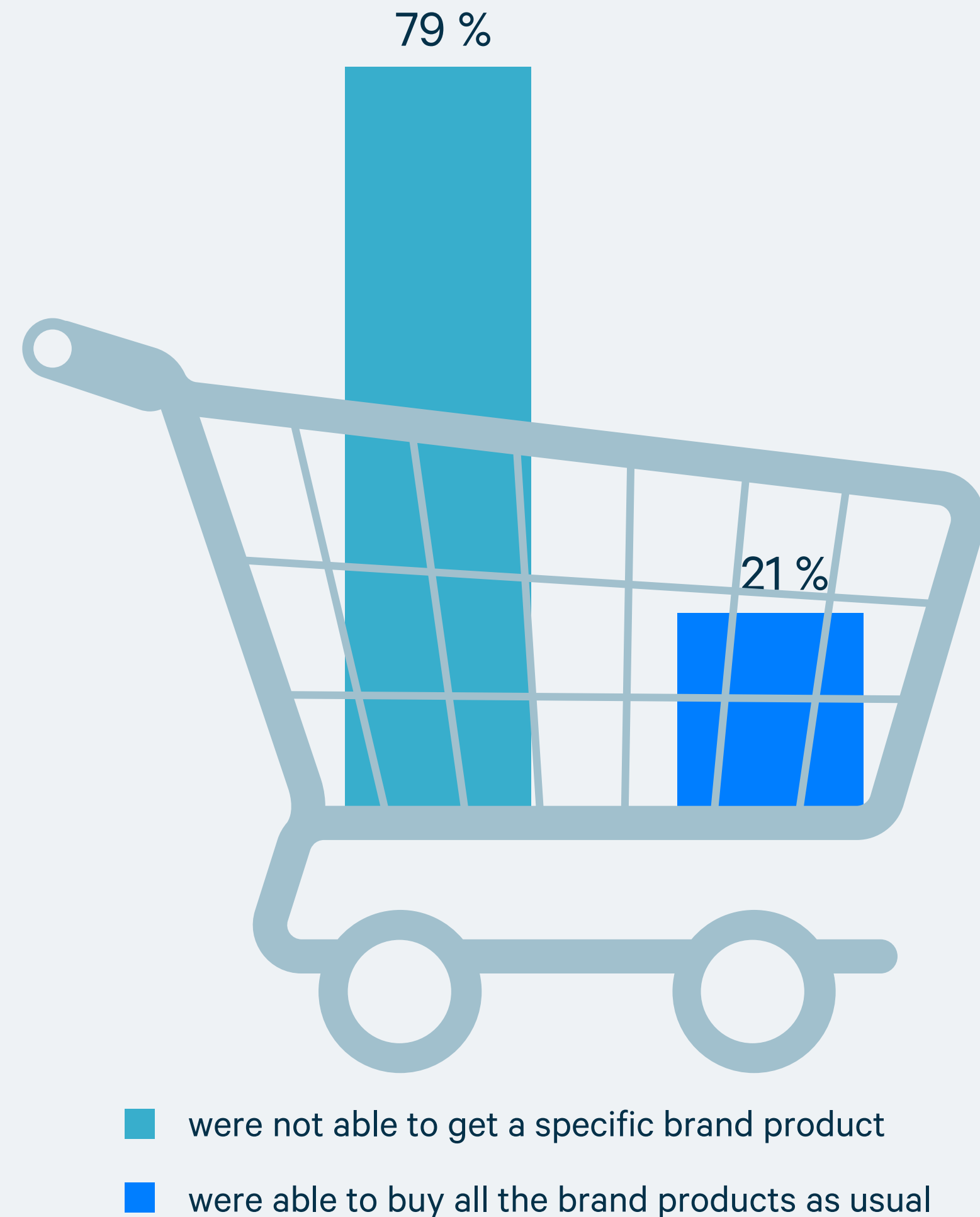
16% report that they have experienced conflict/panic situations while shopping for groceries. 13% of the respondents have experienced this several times.

7 Brand loyalty



Were brand products not available anymore?

Brand loyalty in times of coronavirus – total sample



79% of the respondents (N = 791) have already experienced a situation where a branded product they usually always buy (e.g. Uncle Bens rice, Heinz baked beans was out of stock in the supermarket or drugstore.

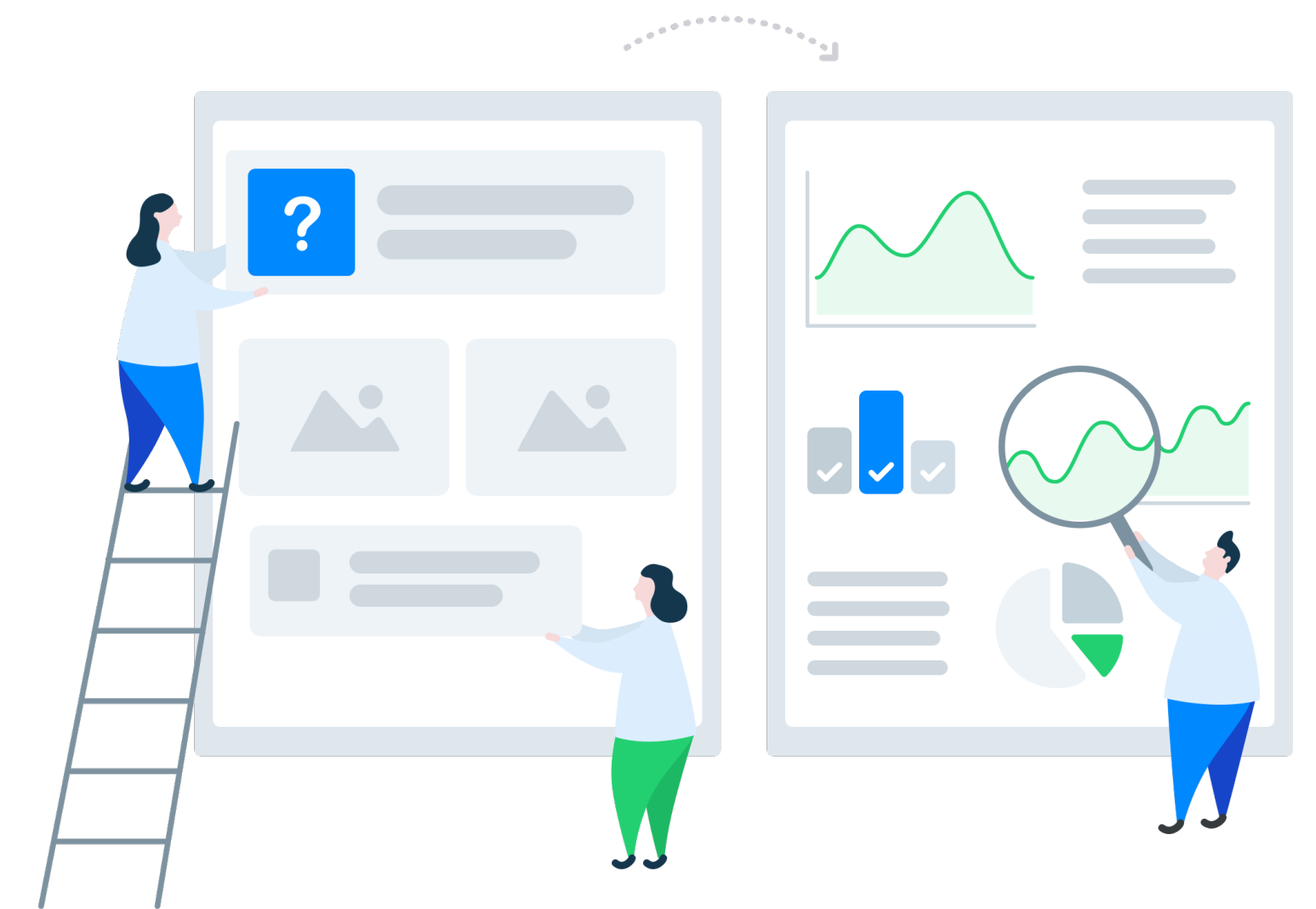
Of these people:

- **37%** bought a similar product from a different brand
- **30%** bought the product at a different store
- **30%** bought a different product instead (e.g. rice instead of pasta)
- **18%** bought the product online instead

(multiple answers possible)

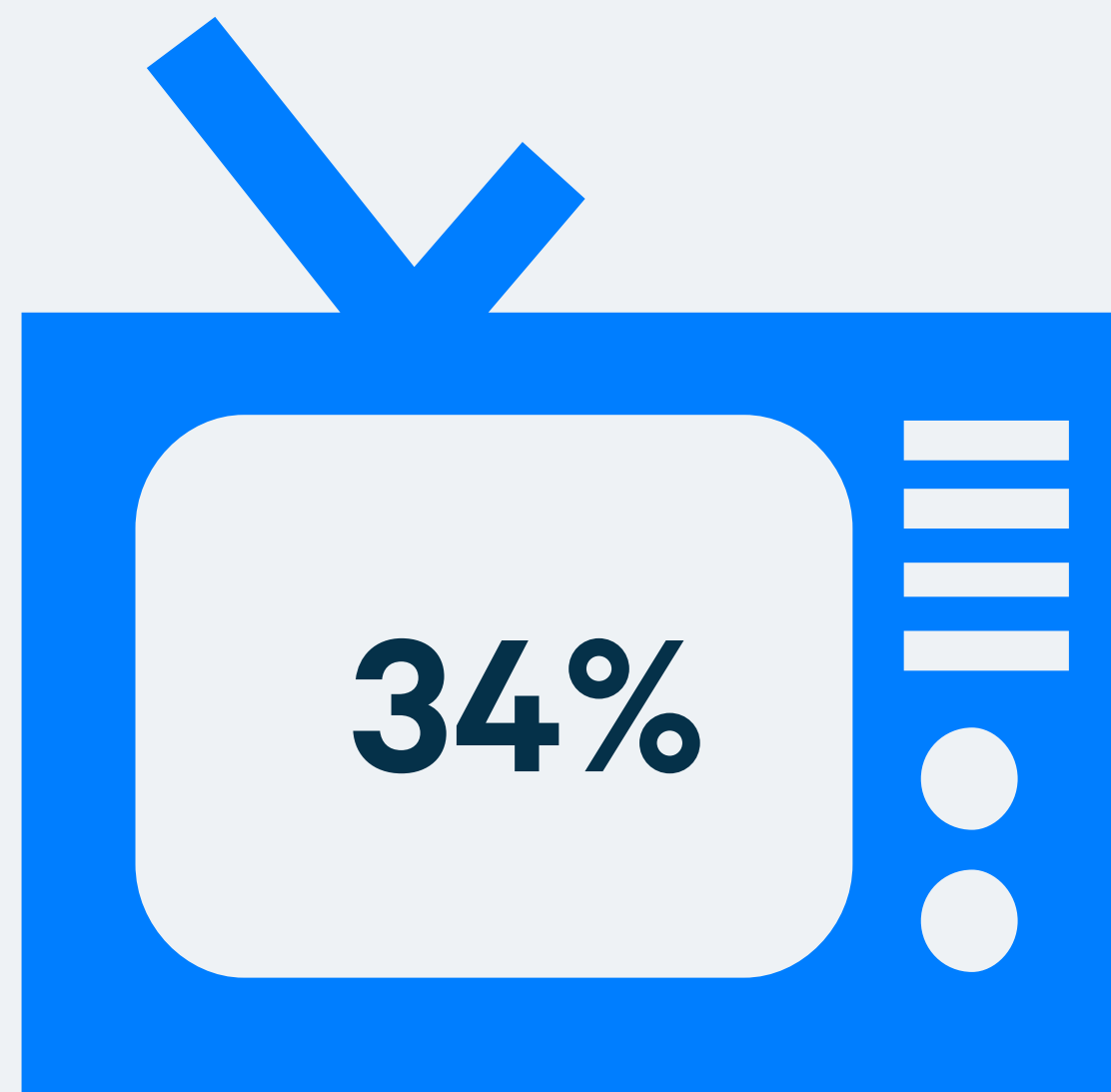
According to free-text answers, mainly pasta, toilet paper, soap / disinfectant and milk brands were out of stock.

8 Ads related to coronavirus



How are ads related to coronavirus perceived?

Coronavirus advertising: perception & rating – total sample



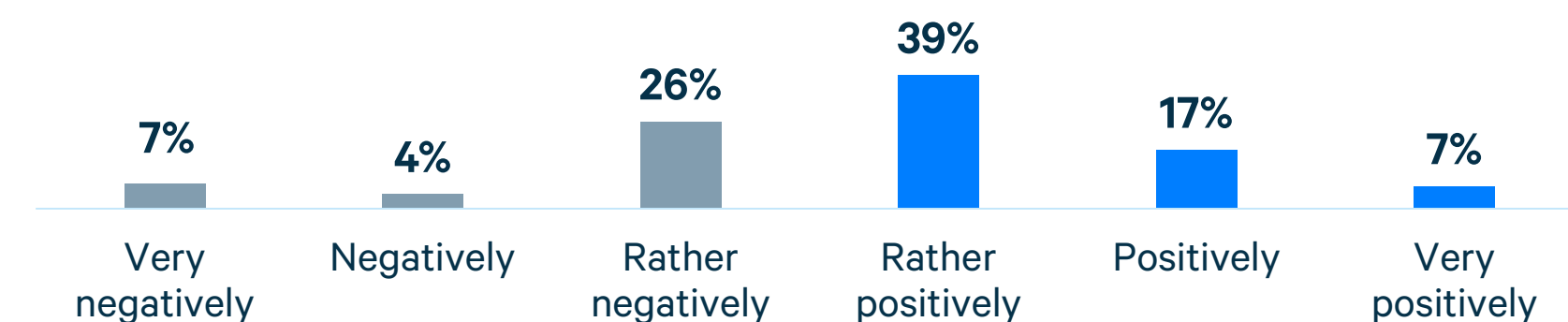
**have already seen
advertisements relating to
coronavirus.**

Which ads did they see? (Top open answers)

1. Official ads from the NHS / government (gov.uk)
2. Infomercials, e.g. wash your hands / stay at home / general information about the virus
3. Supermarkets

Opinions on advertising with the virus are mostly positive (63%). About a quarter (26%) evaluate the advertising positively or very positively.

About 37% rate the advertising as (rather) negative.



Your contacts for studies



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Website: www.appinio.de