KANTAR

COVID-19 Barometer Global Report

Wave 9

May, 2021

Management Summary

Cultural, economic and emotional scars

The situation has eased but anxiety and caution remain very high

The effects are understood to be long term, with widespread pessimism about the economy and the future

Significant numbers of people have been touched by illness themselves or in their close circle, but the truth is virtually everyone has been affected.

Vaccination makes all the difference

The advent of the vaccine is transformative.

Governments successfully implementing the programme see significant approval of their handling of Covid-19

Although there is vaccine hesitancy, willingness to be vaccinated is high and strongly felt. Reasons for hesitancy suggest fear, distrust, misinformation and to some extent, a world view

Acceleration and Disruption

Throughout the pandemic Covid was seen to dramatically accelerate many trends that were already there – such as a wider digital economy, localism, concern with the environment, the cashless economy.

It also brought new habits of hygiene and scrutiny and some in how we live, which along with the accelerated trends, look likely to stay

Building confidence

Many people long for the ordinary texture of everyday life to reassert itself. But the world does not yet appear safe and there is caution about anything more.

Brands and businesses, particularly those with immersive aspects – shops and leisure – still need to show that they are safe and attractive. Brands can offer leadership and examples of good practice and innovation.

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Setting the scene

Kantar's COVID-19 barometer continues to explore the marketing implications of COVID-19 and vaccinations against it

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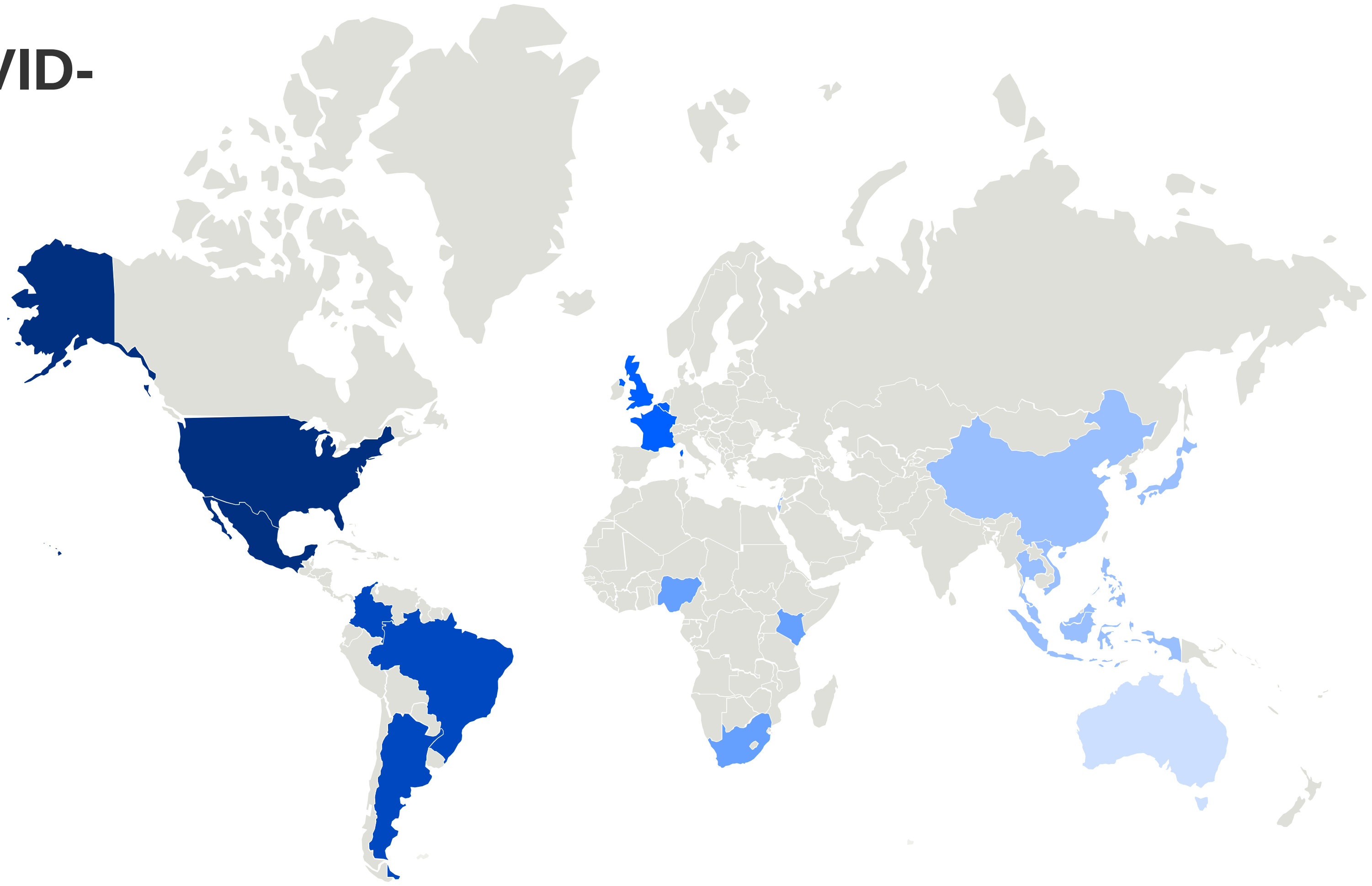

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Countries highlighted are those included in wave 3 and 9. This report compares data from wave 3 and 9, as it has a consistent set of countries.

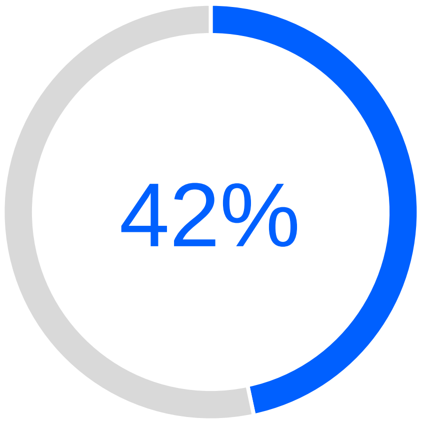
COVID-19 timeline – outlining the vaccination process

Over time data is compared to wave 3 (April 10-13 2020), as it has the same set of markets and is a year ago

- **Aug. 14-18** Barometer wave 8 in field
- **Aug. 14** Confirmed cases surpass 21 million globally
- **Sept. 8** Trials of AstraZeneca and the University of Oxford on hold after a reported adverse reaction in a participant
- **Sept. 23** Johnson & Johnson begins final stage of clinical trials for its vaccine
- **Sept. 28** The world surpasses 1 million COVID-19 deaths
- **Oct. 20** Survey carried out in 19 countries finds high acceptance of a potential COVID-19 vaccine
- **Nov. 9** Pfizer and BioNTech's mRNA-based vaccine candidate is found to be more than 90% effective
- **Nov. 16** Moderna announces its COVID-19 vaccine candidate has shown 94.5% efficacy
- **Nov. 23** The Oxford-AstraZeneca vaccine showed 62% efficacy
- **Dec. 2** The U.K. government approves the vaccine from Pfizer and BioNTech for domestic use — the first country to do so
- **Dec. 8** The U.K. rolls out a COVID-19 vaccination campaign, becoming the first nation to do so
- **Dec. 14** The U.S. rolls out a mass COVID-19 vaccination campaign with the Pfizer-BioNTech vaccine
- **Jan. 8** 42 countries are rolling out COVID-19 vaccine campaigns
- **Jan. 11** Confirmed cases surpass 90 million globally
- **Jan. 30** One year has passed since WHO declared COVID-19 a public health emergency of international concern
- **Feb. 5** Number of people vaccinated globally surpasses number of reported infections
- **March 30** WHO releases a report on its initial investigation into the origin of the coronavirus
- **April 7** EMA concludes that cases of unusual blood clots may be "very rare side effects" of the AstraZeneca vaccine
- **April 15** On average, 1 in 4 people vaccinated in high-income countries. 1 in 500 of all doses globally in low-income countries
- **April 15-19** Barometer wave 9 in field
- **April 19** Previous week saw over 5.2 million new cases, highest number reported in a single week during pandemic

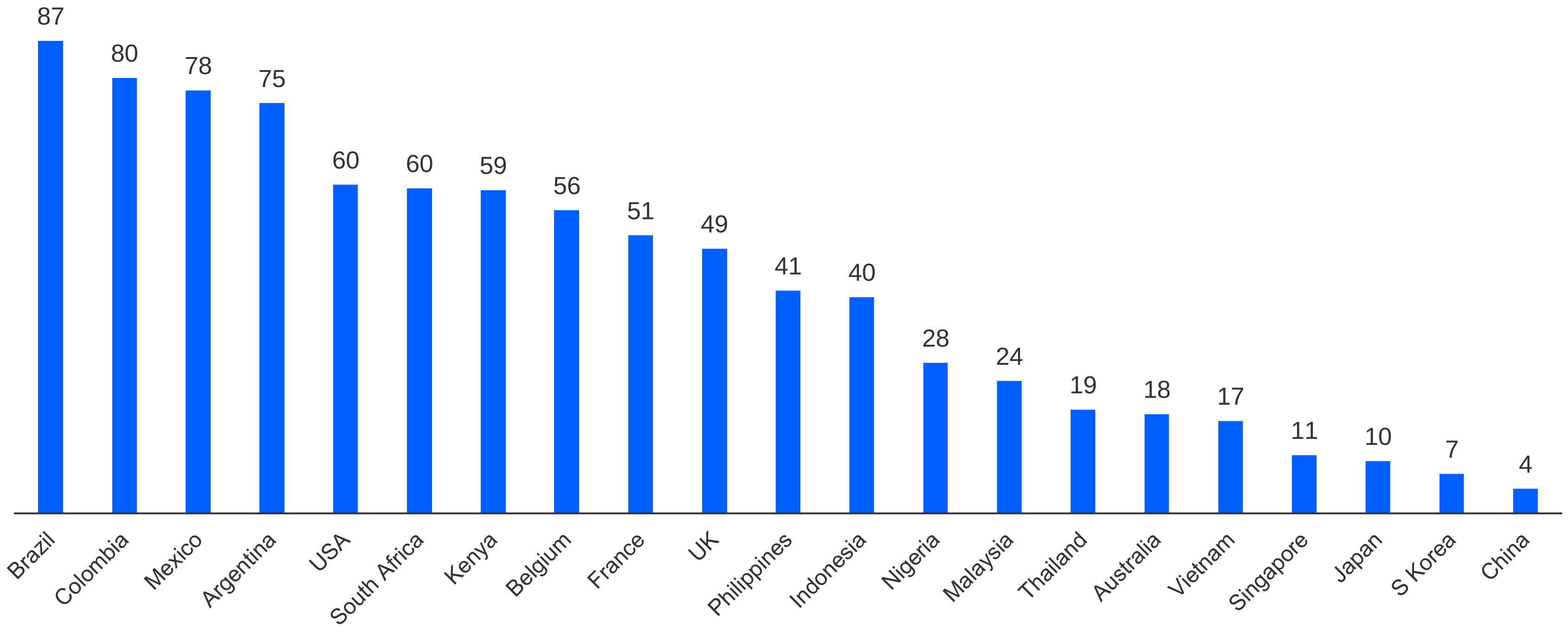
In April 2021, 42% of consumers on a global level report that their close circle (self/ close family/ close friend) has been affected by COVID-19

Overall % affected with COVID-19



8% have contracted the virus themselves, 23% had a close family member affected and 23% a close friend

% Affected by market (self-reported)



Q99. Since the start of the COVID-19 pandemic, have you or someone close to you contracted the virus? Select all that apply

Country groupings explore how recent rises or declines in number of cases and vaccination rates influence consumer sentiment and behaviour

With the arrival of vaccines, an end appears to be in sight as countries strive to recover from the pandemic. However, COVID-19 continues to ravage some populations and vaccine rollouts are faster in some countries than in others. We have therefore analysed the data across 3 clusters of countries based on numbers of new cases and vaccination rates.

	Still struggling	Improvers	Leaders
Description	**Countries where** – **The number of new cases rose or did not decline in past 3 months** AND/OR – **The vaccination rate is 0-30 % of the population**	**Countries where** – **The number of new cases were stable, declining, or low in past 3 months** AND/OR – **The vaccination rate is 0-30 % of the population**	**Countries where** – **The number of new cases were stable, declining, or low in past 3 months** AND – **The vaccination rate is >30 % of the population**
Markets	Philippines, South Korea, Colombia, Malaysia, Japan, Thailand, Kenya, France, Argentina, Brazil	Mexico, South Africa, Indonesia, Australia, Nigeria, Vietnam, Belgium	UK, USA, Singapore

Source: Each country's government's reported data as made available in OurWorldInData.org

2
Overall impact and concerns

The situation may have eased in many places, but anxiety remains high

Even in markets where the virus has declined and the vaccination programme is going well, more than half remain concerned

Still struggling

-5%

75% vs 80% (wave 3)

Improvers

-10%

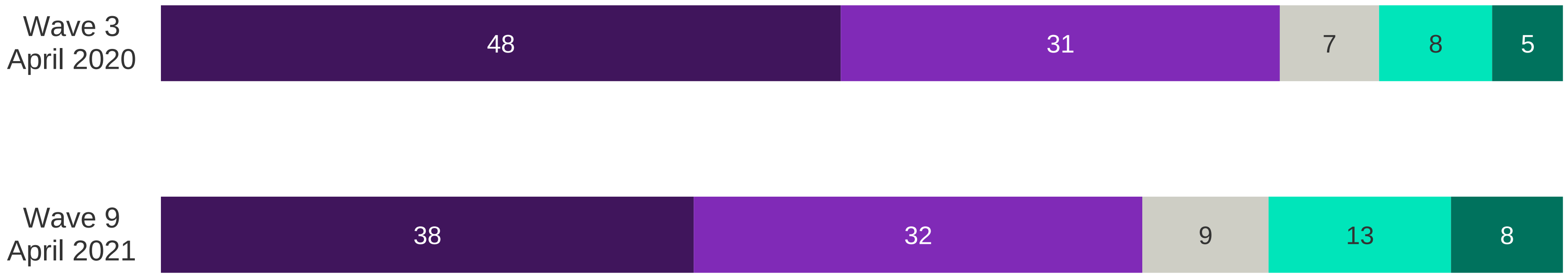
69% vs 79% (wave 3)

Leaders

-19%

57% vs 76% (wave 3)

The current coronavirus situation concerns me hugely



The coronavirus situation doesn't concern me at all

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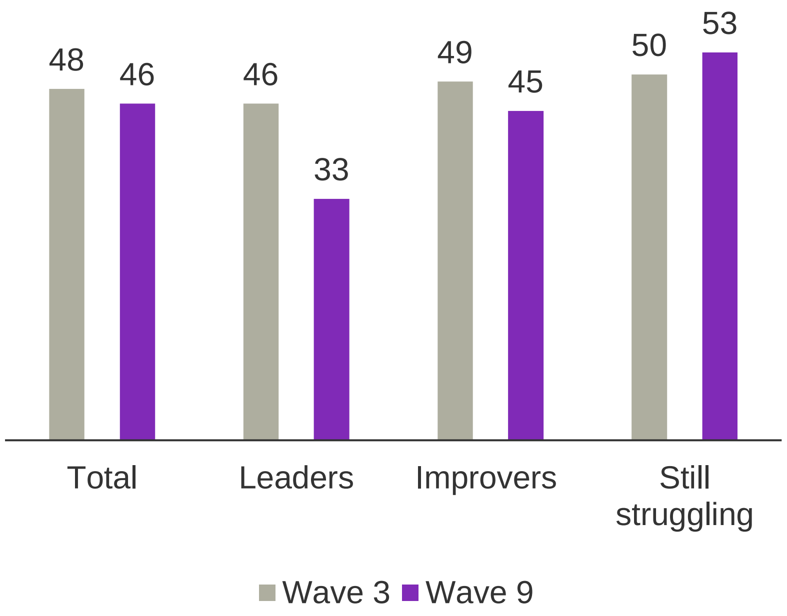
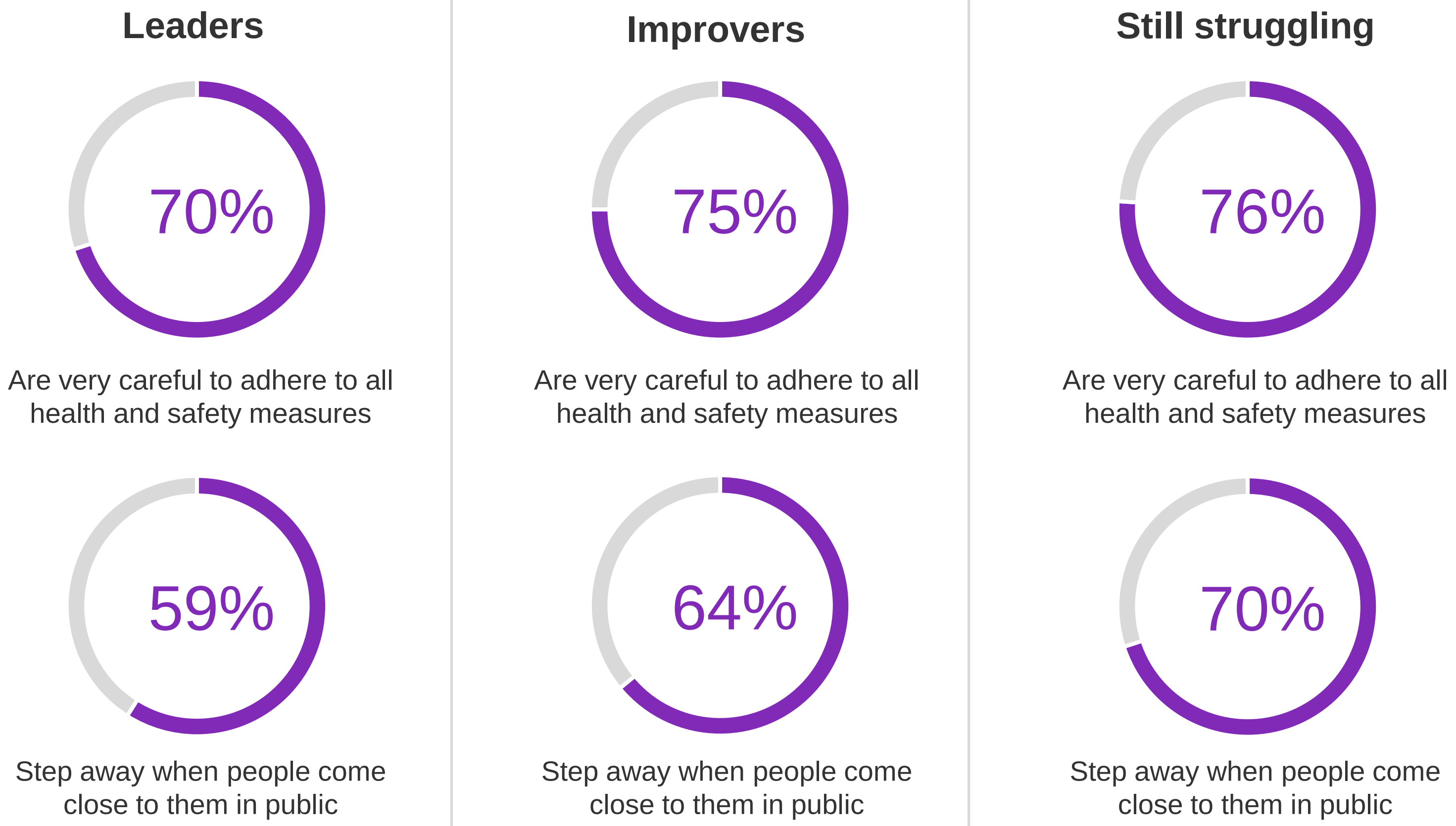
Q1. Listed below are some statements describing people's concern towards the corona-virus situation. Please select the scale point that best reflects where your personal views fall between the 2 statements.

Levels of concern around health are similar to a year ago; vigilance continues

Leader markets are dramatically less worried about their health, but even they are not letting their guard down; most still pay attention to public health and safety measures, just like the rest of the world

% I am worried about falling sick no matter how much I take care of myself





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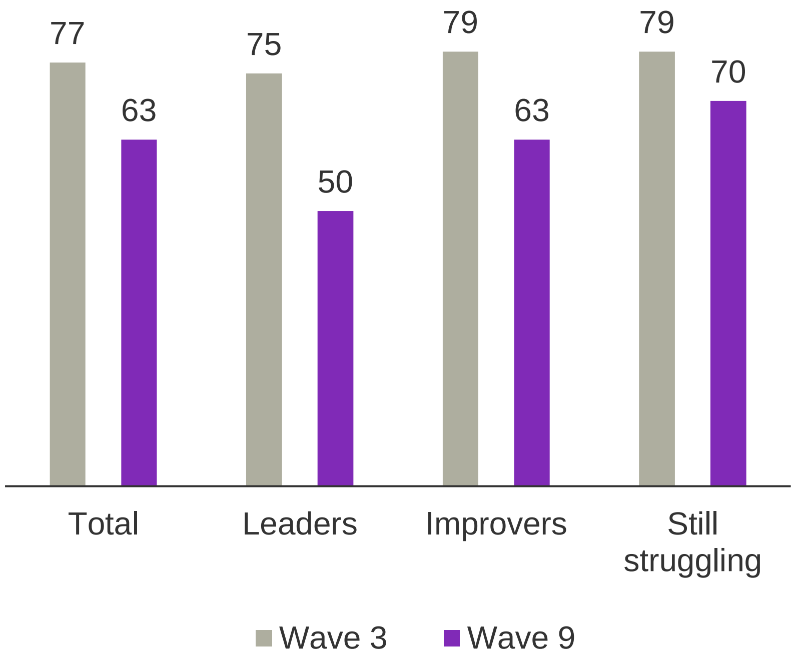
Q1. Listed below are some statements describing people's concern towards the corona-virus situation. Please select the scale point that best reflects where your personal views fall between the 2 statements. **Q59.** Which of the following best describes how you feel and behave in the current COVID-19 situation? Please select the scale point that best reflects where your personal views fall between the 2 statements

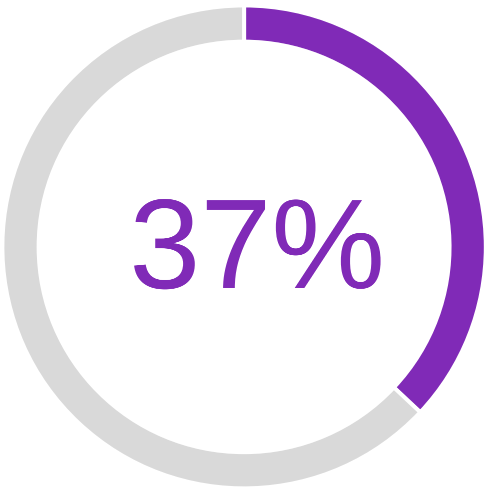
Most still feel the impact on their daily lives, though this has declined

China is far ahead of the curve but in Brazil, with high numbers of cases, over ¾ feel it day to day

% The current coronavirus pandemic is impacting my day to day life

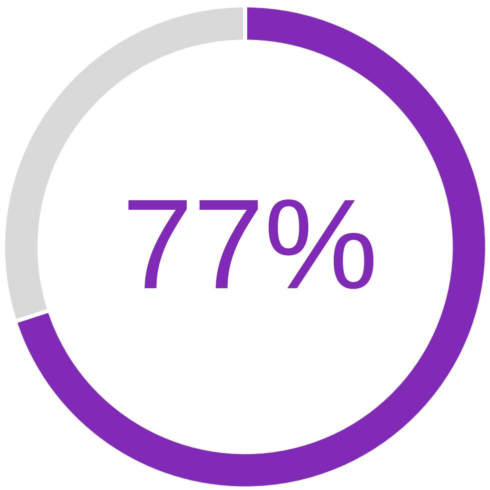


Massive improvement in China



Feels that the pandemic is impacting my day to day life (vs 71% a year ago)

Brazilians feeling higher impact



Feels that the pandemic is impacting my day to day life (vs 73% a year ago)

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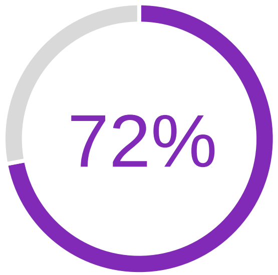
Q1. Listed below are some statements describing people's concern towards the corona-virus situation. Please select the scale point that best reflects where your personal views fall between the 2 statements.

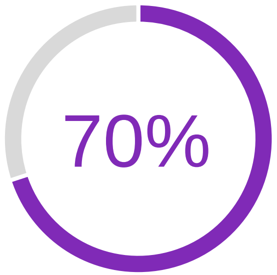
Most have felt the financial impact of COVID-19 personally and economic optimism is in short supply – the aftermath will be long term

Economic income impacts widely felt



either feel an impact on their income (54%) or expect this to happen (18%)

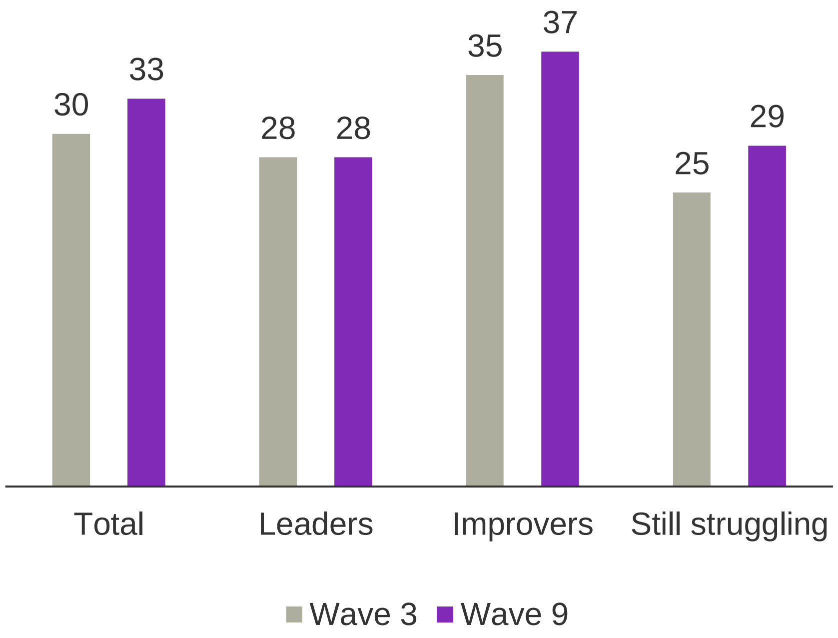
Price chasing is the #1 shopping habit



pay more attention to prices compared to before the pandemic

Most prevalent among young adults (18-34) and African, Latin American, Asian countries

% I believe the economy will recover quickly once the situation has died down



Q22. Thinking about your household income, that is the income of everyone in your household, which one of these statements comes closest to your current situation? **Q1.** Listed below are some statements describing people's concern towards the corona-virus situation. Please select the scale point that best reflects where your personal views fall between the 2 statements. **Q5.** In comparison to before the pandemic, how have your shopping habits at stores, supermarkets and shopping malls changed? Please select the scale point that best reflects where your personal views fall.

People are no more positive about the future than they were a year ago

Whether you came across the virus or not the outlook is gloomy, reinforcing that the impacts of COVID-19 go well beyond illness

47%

Are worried about the future versus 49% last year

% very worried about the future

Even those whose close circle (self/ close family/ close friend) was not immediately touched by the virus are worried about the future

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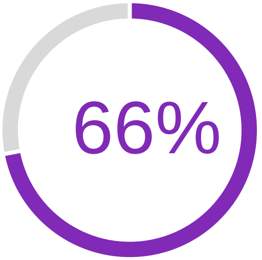
Q1. Listed below are some statements describing people's concern towards the corona-virus situation. Please select the scale point that best reflects where your personal views fall between the 2 statements.

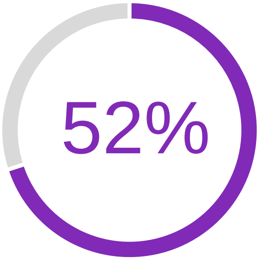
With continuing high visibility on top of all these very real impacts, it is not surprising that large numbers feel the effects on their mental health

News about the pandemic is highly noticeable



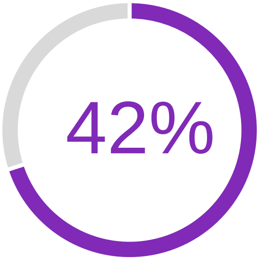
read, see, or hear news about the situation

People keep a close eye on COVID-19 casualties



check the numbers of new infections and deaths due to the virus

The situation also taking its toll on people's mental well-being



feels the situation impacts their mental health

COVID-19: Depression in adults has more than doubled since before pandemic

Around one in five adults experienced symptoms compared with one in ten in the period before coronavirus took hold of the country.

Less in Leader markets, but at least 1 out of 3 people still experience/do/feel this way in those countries

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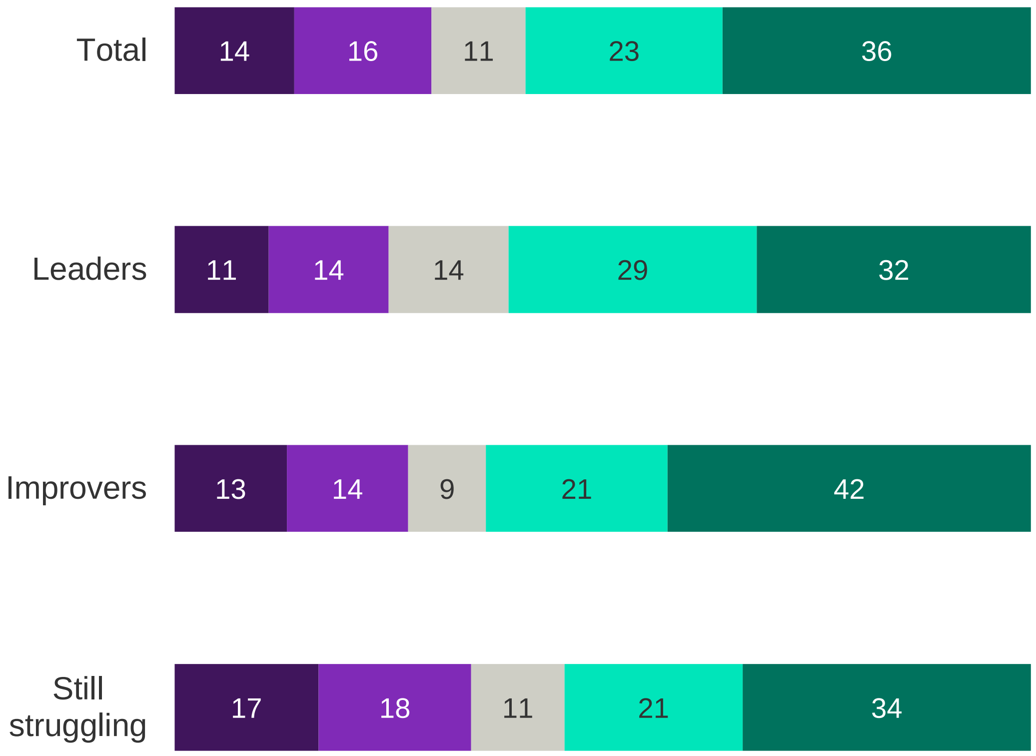
Q59. Which of the following best describes how you feel and behave in the current COVID-19 situation? Please select the scale point that best reflects where your personal views fall between the 2 statements
Source: https://news.sky.com/story/covid-19-depression-in-adults-has-more-than-doubled-since-before-pandemic-12297411

Ultimately, people have learned caution; they favour adherence to the rules, and condemn those not following them

This has been going on too long, you can't expect people to adhere to these rules anymore



We must all follow the rules until we get to the end of any significant risk

People view rule-breakers very negatively

Get angry when they see someone else not adhering to the latest rules

Think there should be punishments imposed to people not adhering the latest rules

Lowest in Leader markets, but even there 1 out of 2 people still feel this way

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3
Satisfaction with Government responses

There are genuine concerns about the performance of governments in dealing with this situation

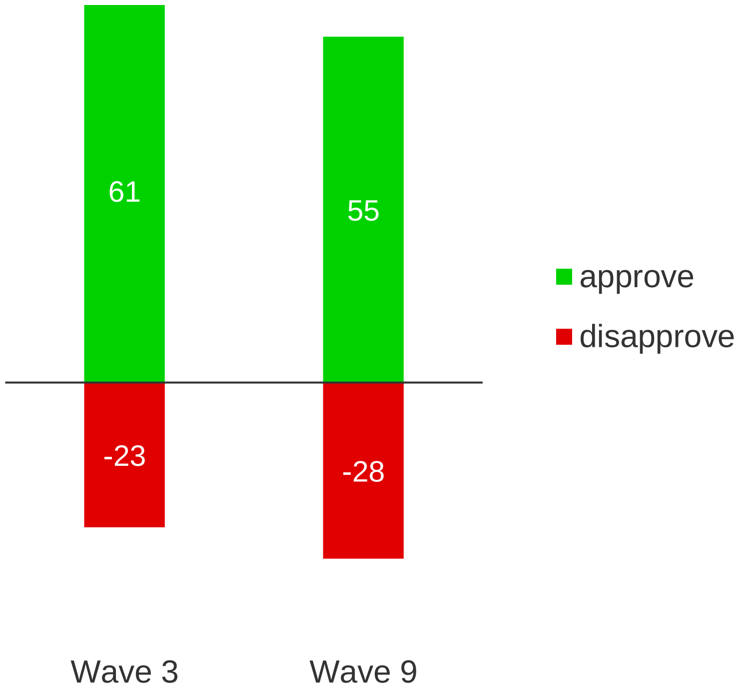
Polarized opinion about the government solving the crisis

48%

Think their government is doing all it can to reduce the crisis

(another 38% think their government is not doing enough: 14% are neutral)

Disapproval of government actions increased



This is mostly driven by Struggling markets, where government actions disapproval is high

Brazil
59%
(versus 38% in wave 3)

Colombia
44%
(versus 23% in wave 3)

Argentina
40%
(versus 13% in wave 3)

Belgium
43%
(versus 27% in wave 3)

France
41%
(versus 41% in wave 3)

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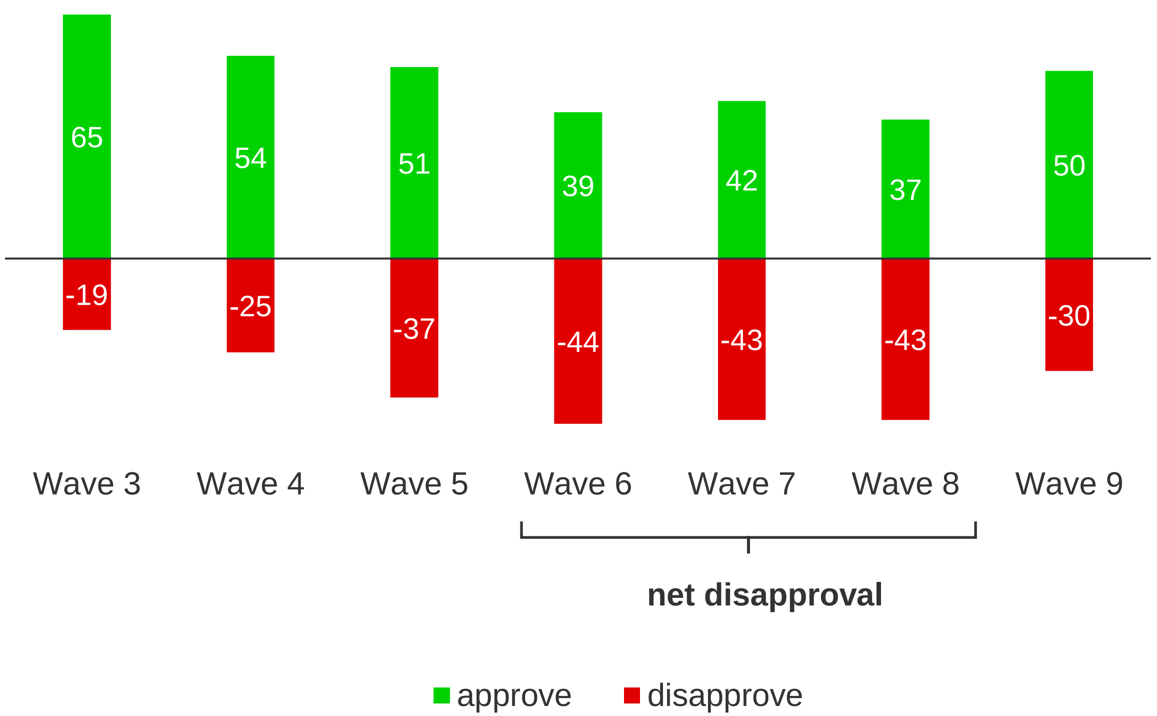
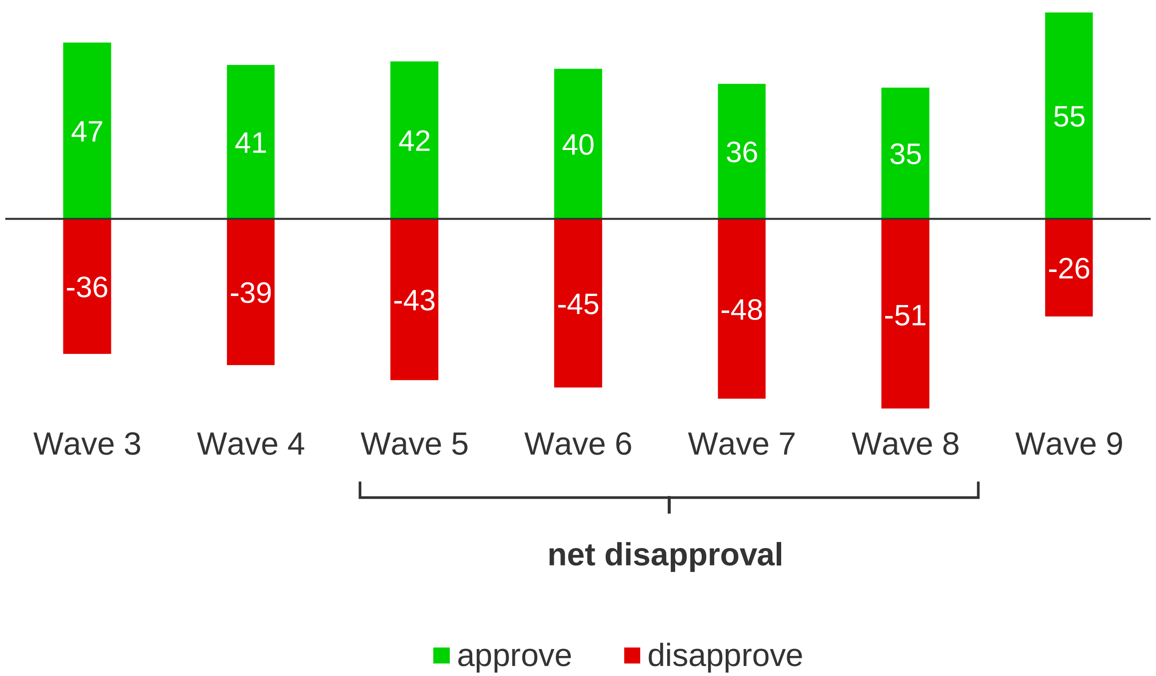
Q59. I think the government is doing all it can / not doing enough (T3B) – Wave 9 / Q29. How much do you approve or disapprove of the way the government is responding to the coronavirus pandemic?

However, long standing net disapproval rates in the UK and US have been reversed as incidence declines and vaccine programmes progress

UK approval/disapproval of govt actions



USA approval/disapproval of govt actions



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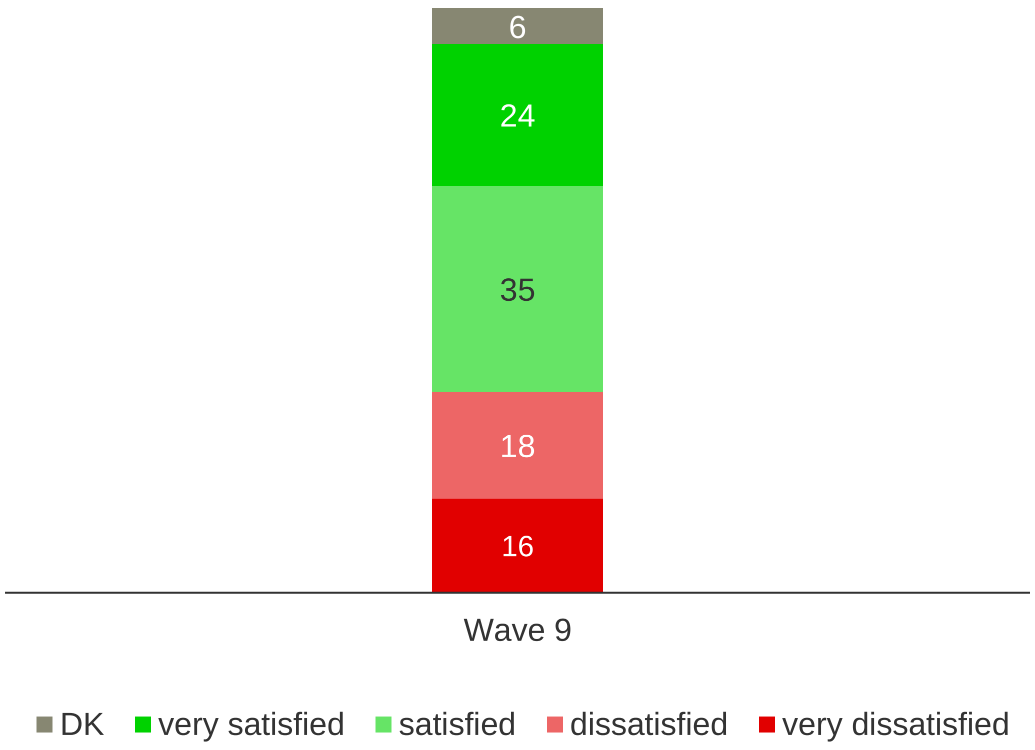
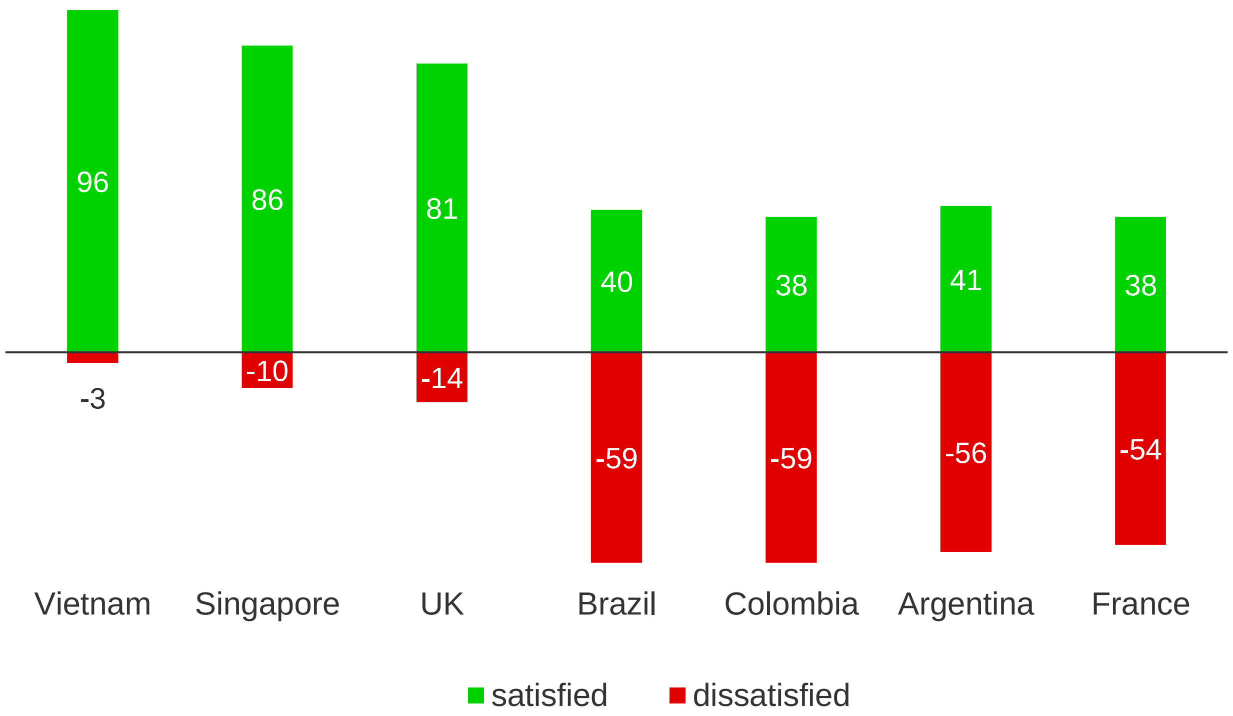
Q29. How much do you approve or disapprove of the way the government is responding to the coronavirus pandemic?

Satisfaction with vaccination campaign is positive though countries vary widely, with hard-hit Latin America most dissatisfied

Satisfaction about vaccination campaign



Markets specifically satisfied/dissatisfied about government vaccination campaign



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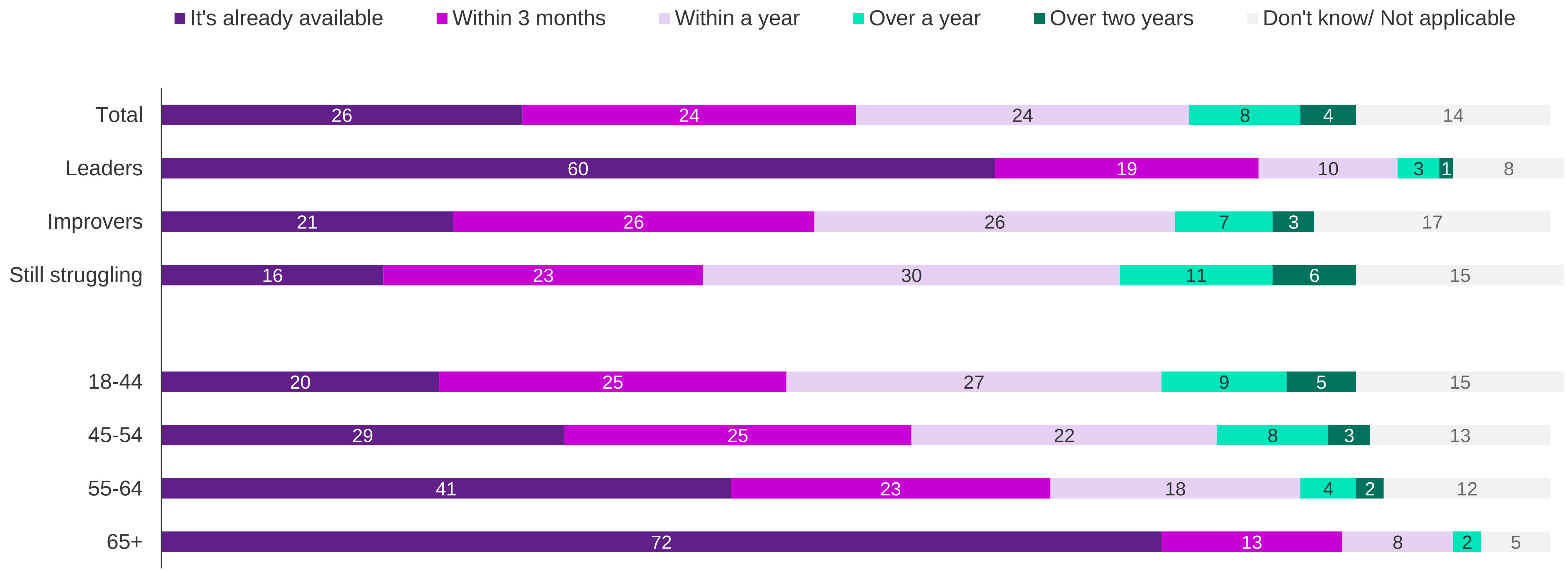
Q106. How satisfied are you with the way your government and health authorities are organizing the vaccination campaign in your country?

4
Vaccination process

Encouraging numbers have access to vaccination but this is unevenly distributed across countries. Age driven distribution strategies are clear



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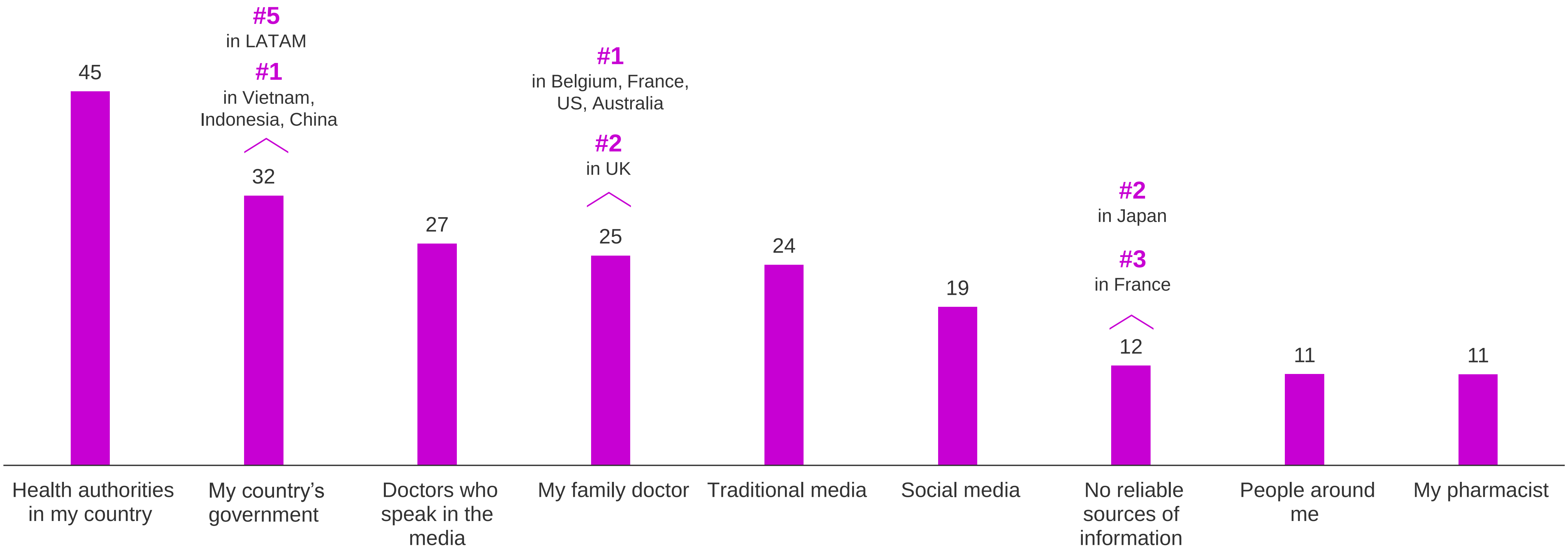
Q103. When do you think a COVID-19 vaccine will be available to you?

Official sources of information on the vaccine are viewed as most reliable

The same was true across many countries in early days of the pandemic when the main question was how to remain safe, suggesting a continuing need for authority, leadership and scale, as well as expertise



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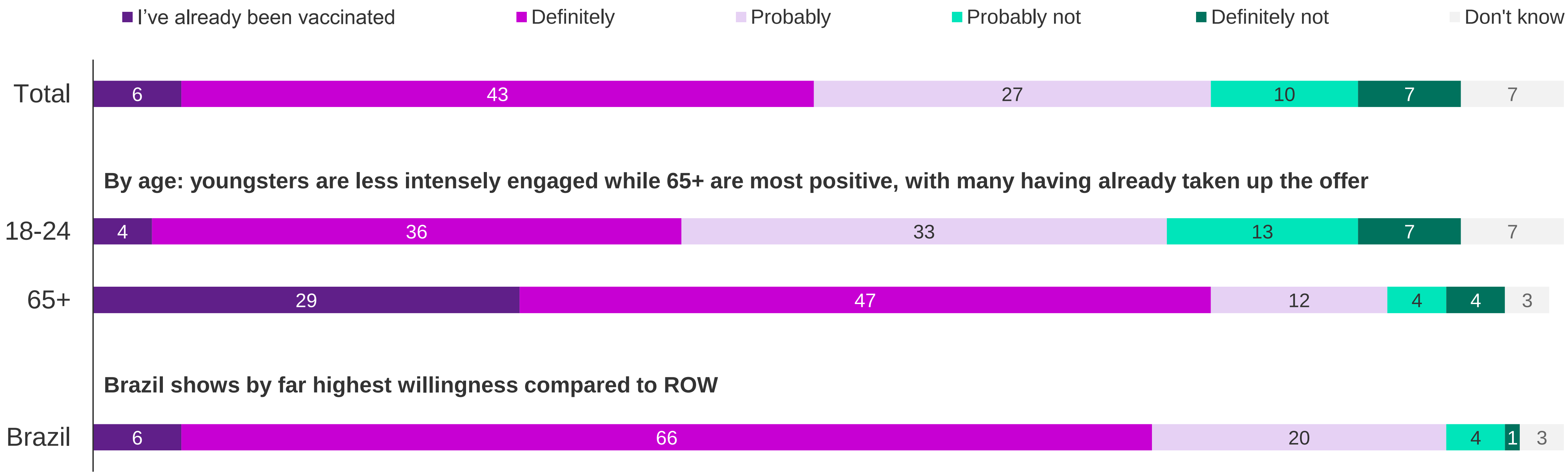
Q107. Which of the following sources do you consider reliable for information on a Coronavirus (COVID-19) vaccine?

Willingness to get a vaccine is high, especially where risk is highest



Markets least willing to get the vaccine are France, Australia, South Africa, Japan & US (all probably/definitely not >20%)

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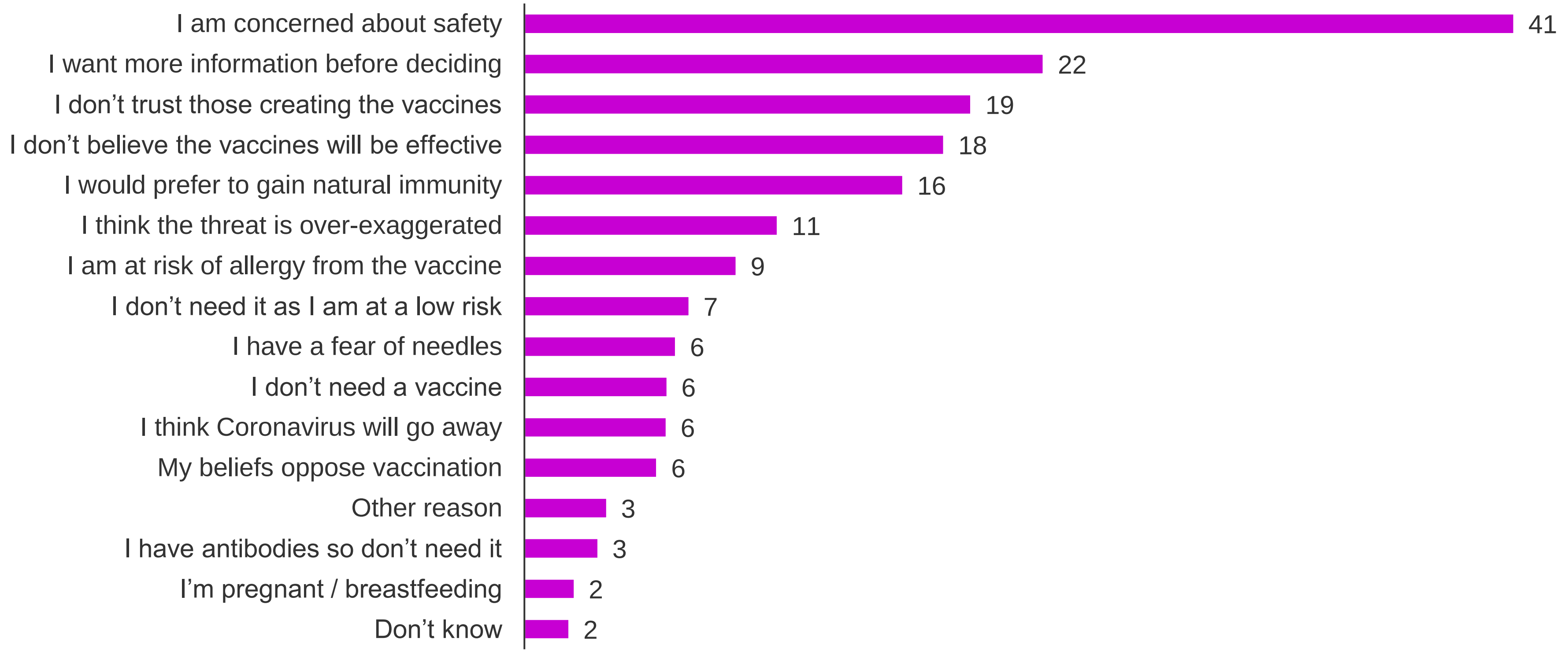
Q104. When a COVID-19 vaccine is available to you, how likely would you be to get it?

Reasons for not taking a vaccine show a mixture of physical fear, active distrust but also, aspects of your world view

17%

Doesn't want to get a vaccine when it's available

Reasons for not getting a vaccine



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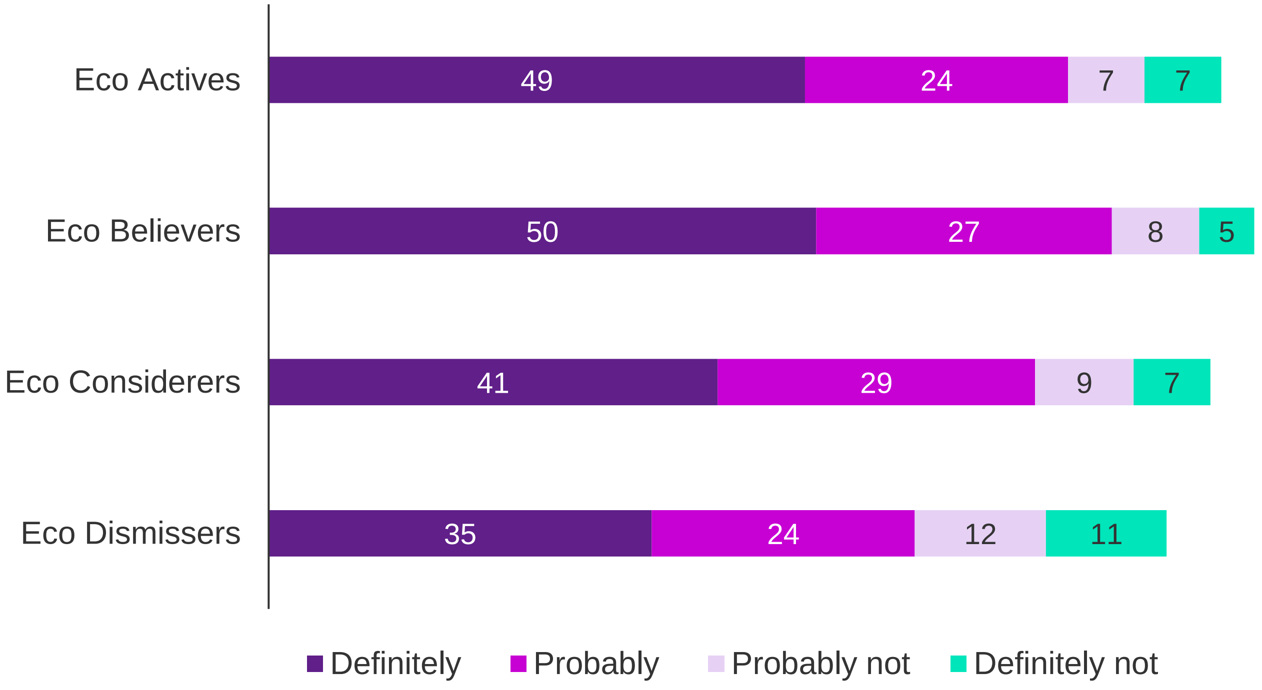
Q104. When a COVID-19 vaccine is available to you, how likely would you be to get it?
Q105. What are the two main reasons you currently plan not to get vaccinated? Please select 2 answers only.

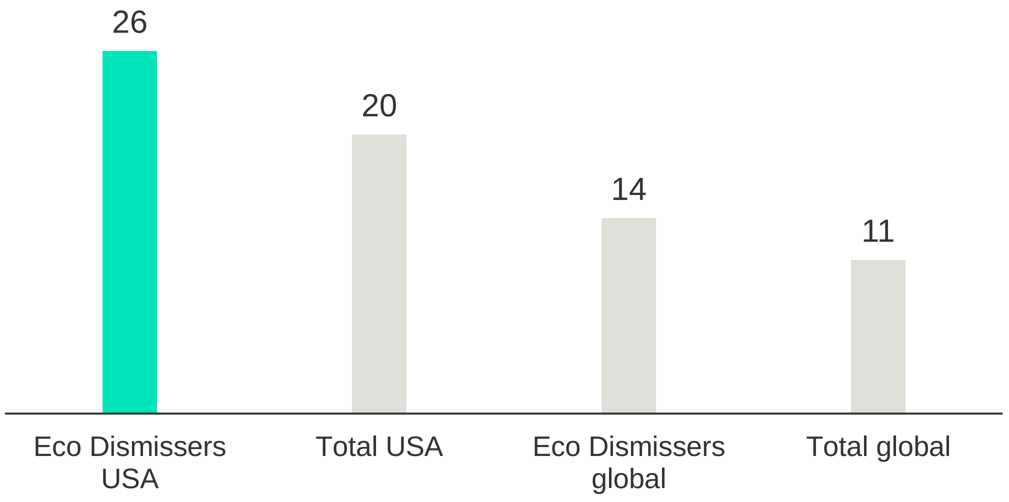
Lack of willingness is highest among Eco Dismissers - our most skeptical sustainability segment*

Like eco related topics, vaccination has been politicized in some places (example US)

% willingness to get the vaccine



% thinks the threat of COVID-19 is over-exaggerated



IDEAS

Millions Are Saying No to the Vaccines. What Are They Thinking?

Feelings about the vaccine are intertwined with feelings about the pandemic.

MAY 3, 2021

*explanation about the sustainability segmentation can be found in the appendix

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Q104. When a COVID-19 vaccine is available to you, how likely would you be to get it?
Q105. What are the two main reasons you currently plan not to get vaccinated?
Source: https://www.theatlantic.com/ideas/archive/2021/05/the-people-who-wont-get-the-vaccine/618765/
*information on the segmentation can be found in the appendix

5
Changed behaviour

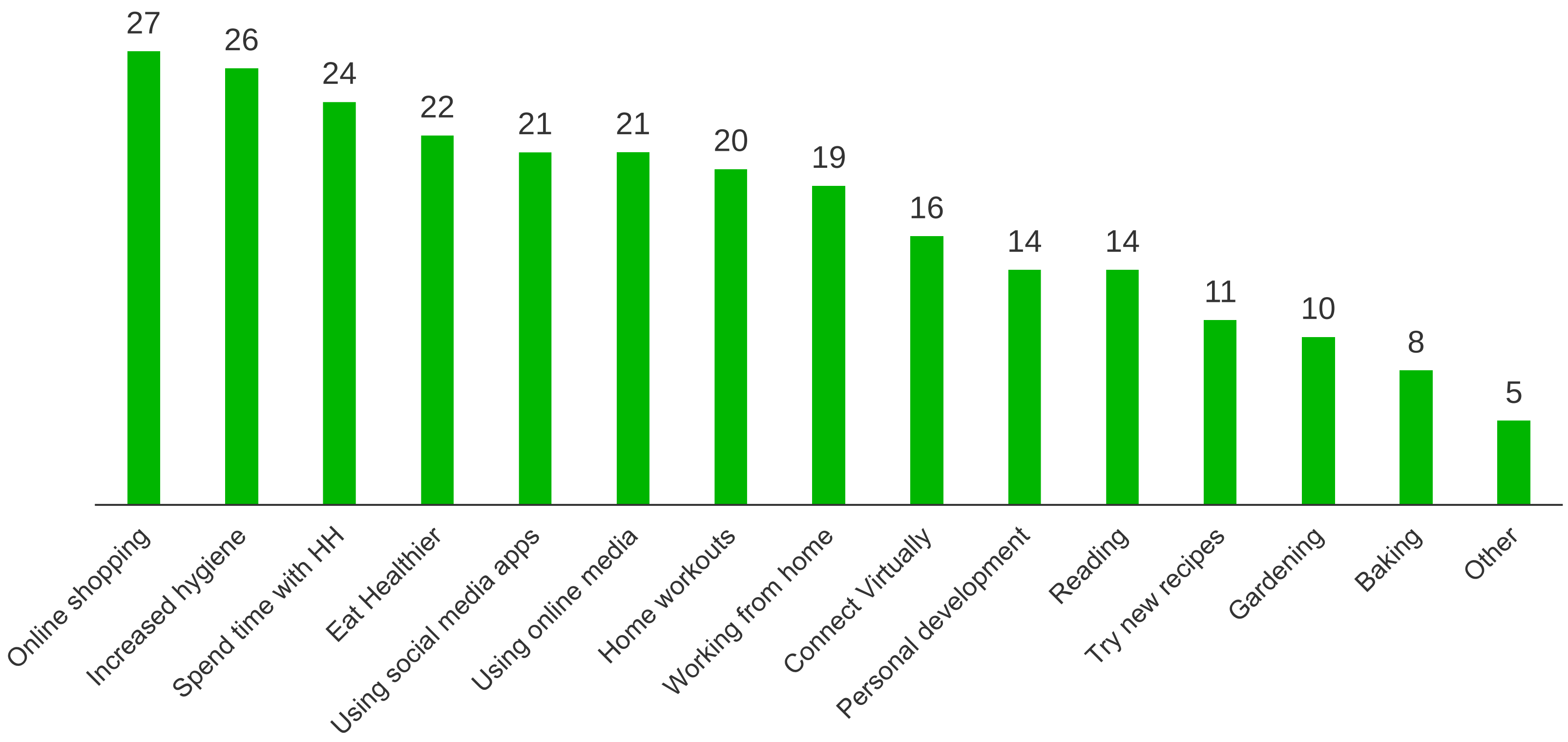
We had lots of good intentions, and some became reality

We have continued to shop online, increase our hygiene and spend time with people in our households

Behaviours most likely to maintain post lockdown (Top5, wave 5, May 2020*)

1. Increased hygiene
2. Eat healthier
3. Spending time with HH
4. Personal development
5. Online shopping
6. Using online media
7. Reading
8. Social media apps usage
9. Working from home
10. Try new recipes
11. Connecting virtually

Behaviours now doing more of compared to pre-pandemic (Top3, wave 9)



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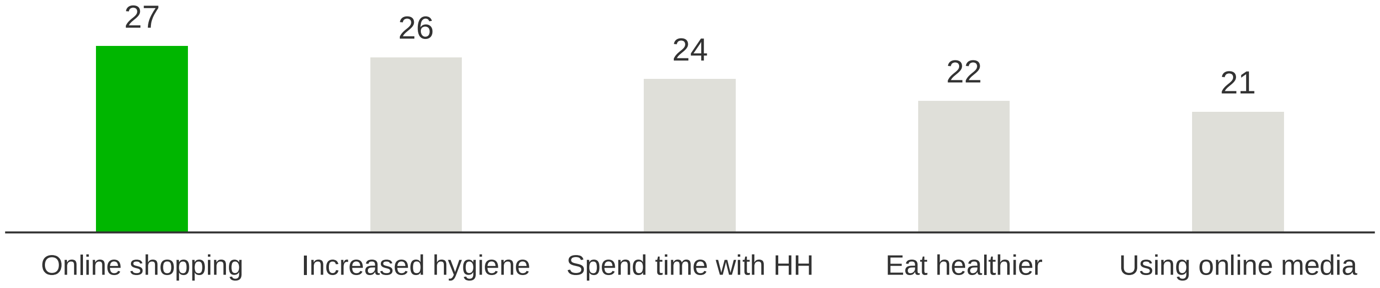
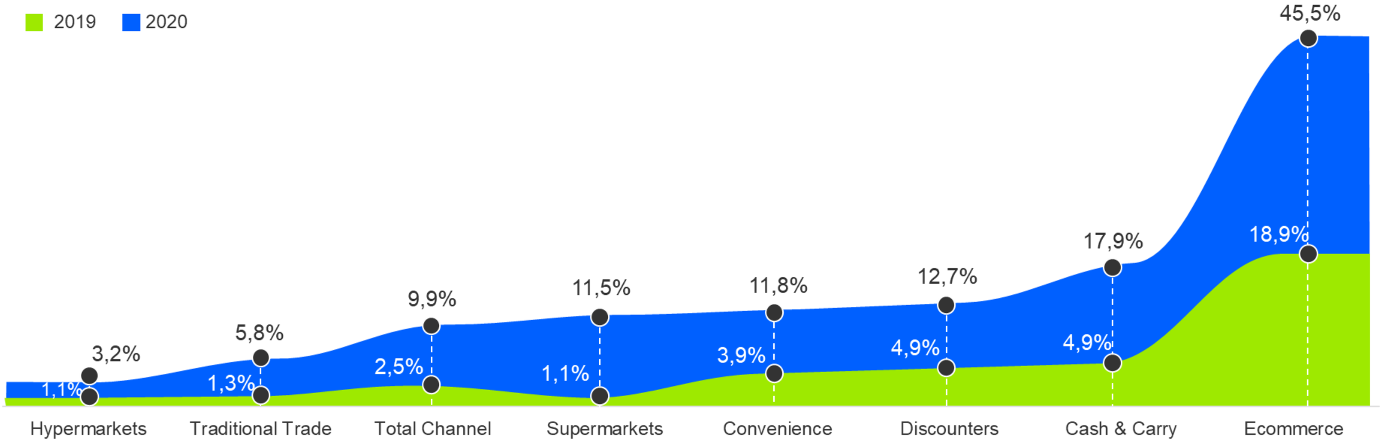
Q51. What are the behaviours that you think you're most likely to maintain once the lockdown is over?
Q92. Compared to before the pandemic began, which of these behaviours are you now doing more of?
*only includes a subset of markets

The pandemic accelerated online shopping

Online shopping is the #1 increased behaviour



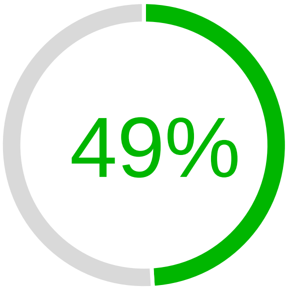
Resulting in ecommerce being the fastest-growing channel in 2020, more than doubling its growth rate from 2019



Source: Winning Omnichannel 2021 - FMCG 2019 & 2020 Global value annual growth

And we plan to continue to use new online stores and new brands

Found new online stores and will continue to use them

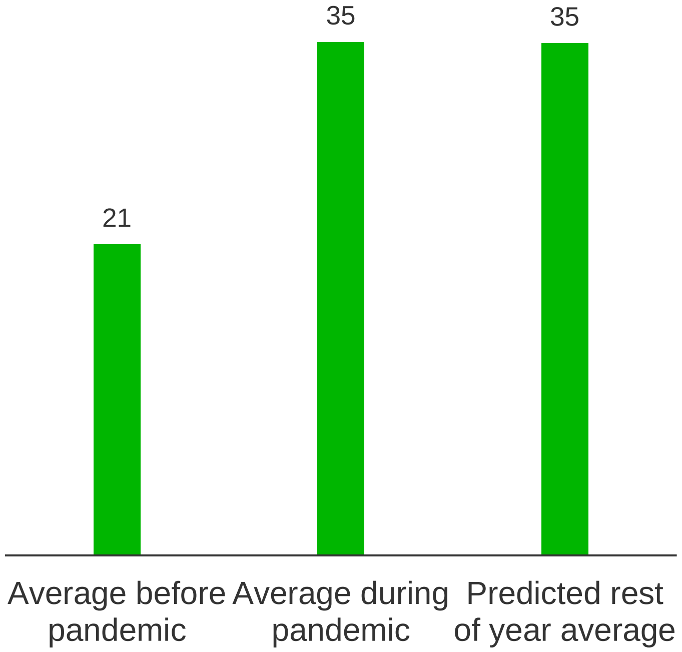


Tried different brands and will continue to buy them

Q51. What are the behaviours that you think you're most likely to maintain once the lockdown is over?
Q92. Compared to before the pandemic began, which of these behaviours are you now doing more of?
Q45. With the COVID-19 situation, …

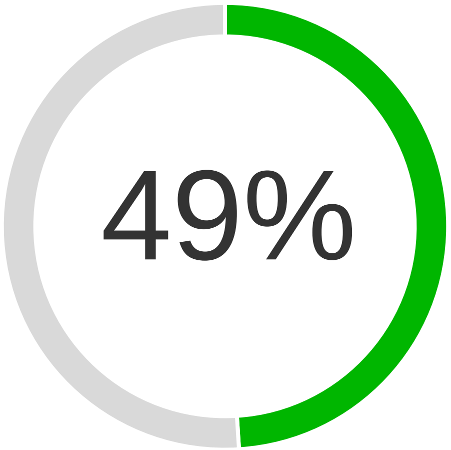
People buy more groceries online, and will continue to do so

% of groceries bought online



Even China, the biggest e-commerce market, continued to grow

China



Vs 41% before pandemic

African and LATAM markets experienced the highest growth

Kenya
+23%
(43% vs 20% before pandemic)

Brazil
+20%
(37% vs 17% before pandemic)

Colombia
+20%
(39% vs 19% before pandemic)

Nigeria
+19%
(43% vs 24% before pandemic)

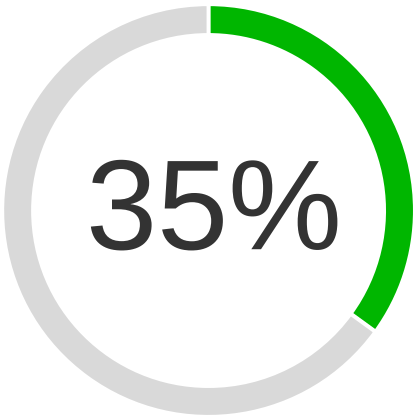
South Africa
+18%
(36% vs 18% before pandemic)

Q101. Now think about your shopping habits again and try to estimate the % below
Bought xx% of my groceries and household products online

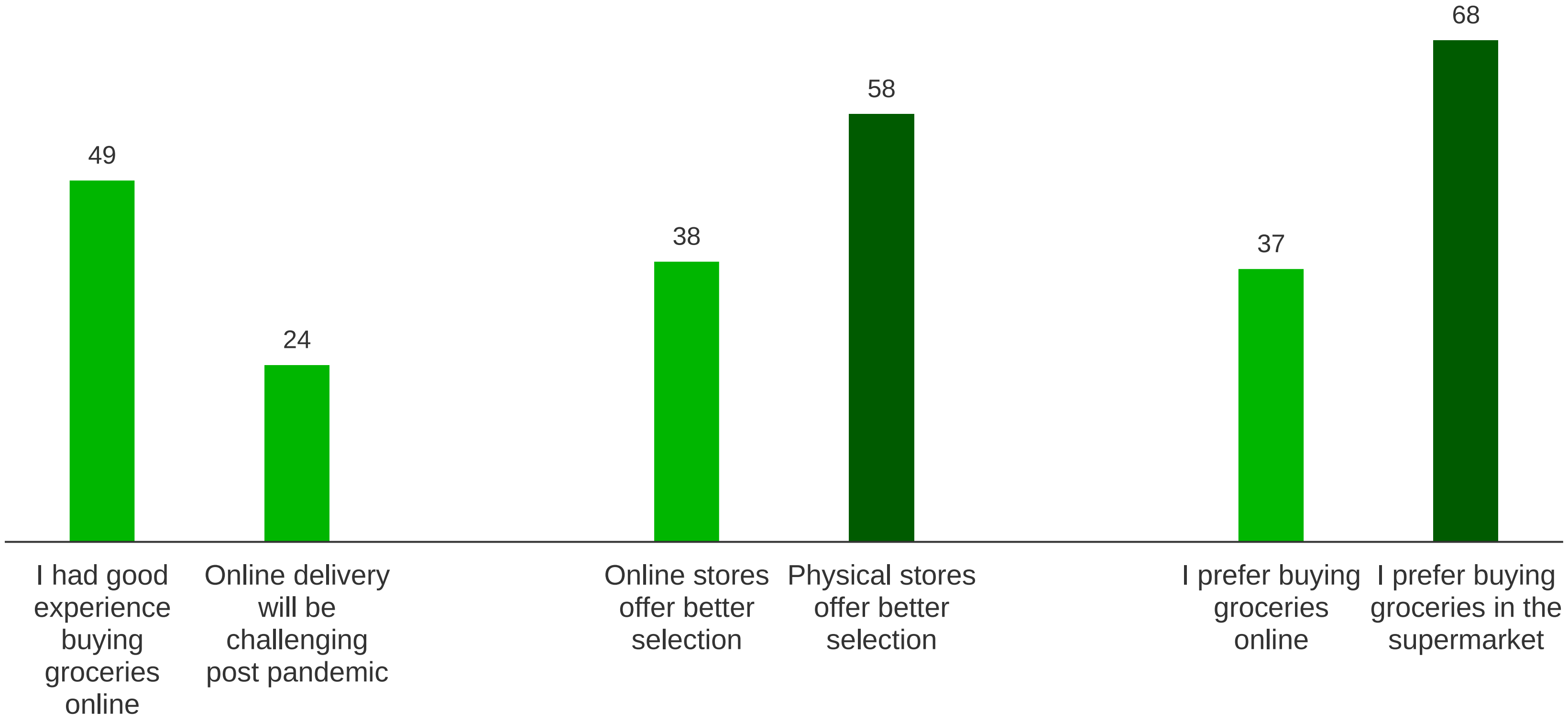
However, people still crave a 'real' shopping experience

Despite good online shopping experiences, people prefer buying from supermarkets

Shopping is the second most anticipated activity to do after restrictions are lifted (after haircuts)



Want to go shopping as soon as possible, once there are no more government restrictions



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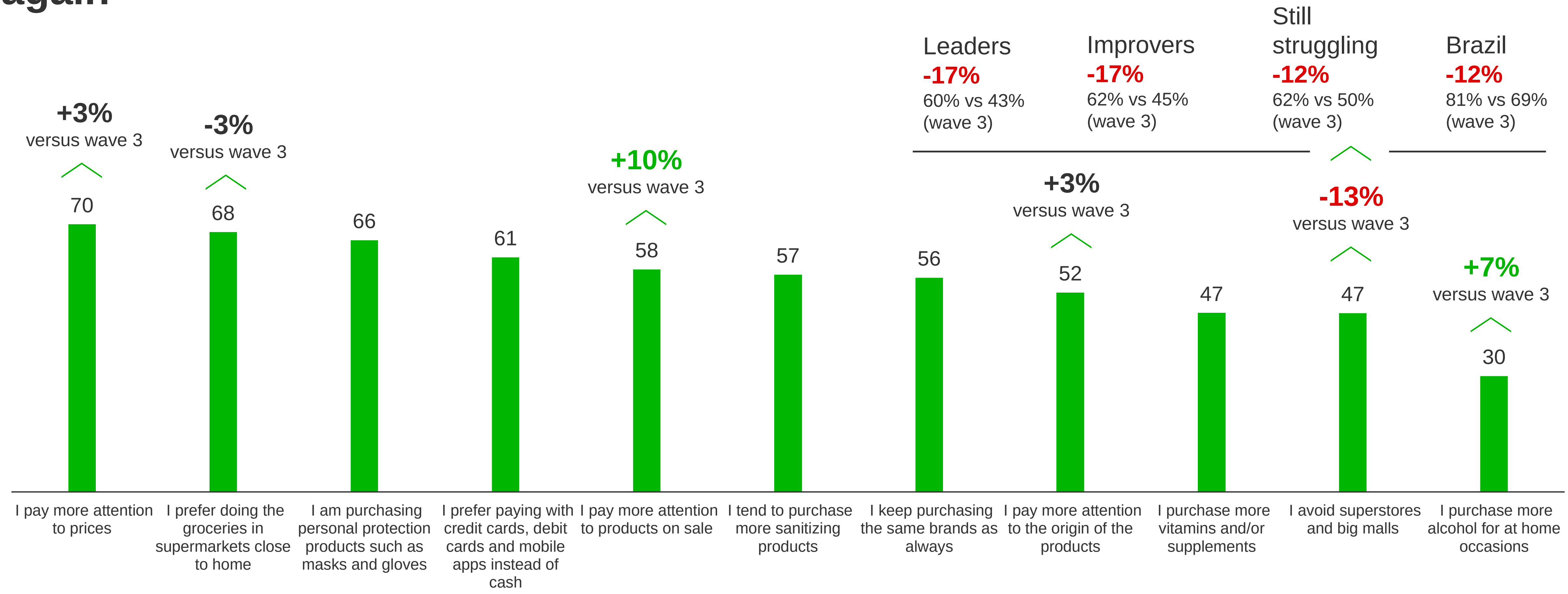
Q53. Assuming there were no longer any government restrictions, when would you feel comfortable doing the following?
Q102. How much do you agree or disagree with the below statements?

A significant drop in avoiding superstores and malls, even in Struggling markets, also points to a strong desire to experience real world shopping again



KANTAR

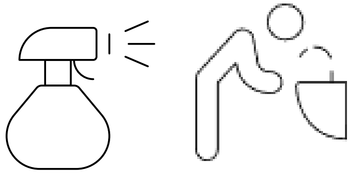
Q5. In comparison to before the pandemic, how have your shopping habits at stores, supermarkets and shopping malls changed? Please select the scale point that best reflects where your personal views fall.

Increased hygiene is here to stay

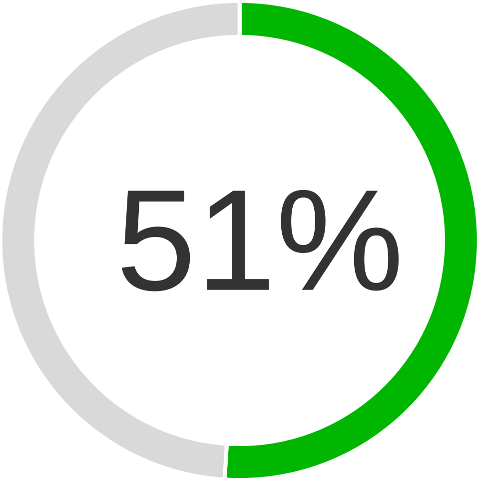
Increased hygiene is

#2

behaviour people are now doing more of compared to pre-pandemic

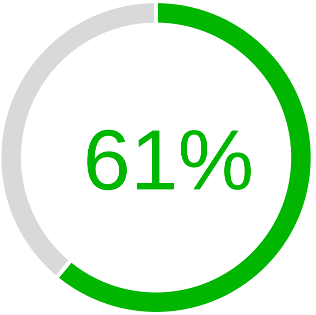


To feel safe to return to normal daily life

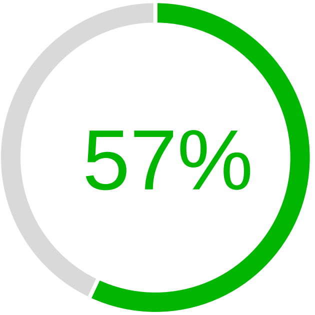


Of people need regular sterilization measures at places they go to

In comparison to pre-pandemic



Prefers non-cash payment and…



Purchases more sanitizing products

"The Homecare sector grew at 9.8. Increased demand was generated by an increased focus on hygiene and cleanliness combined with spending more time at home. This led to Bleaches and Household Cleaners growing 25% and 21%, respectively – two of only six categories which saw growth over 20%."

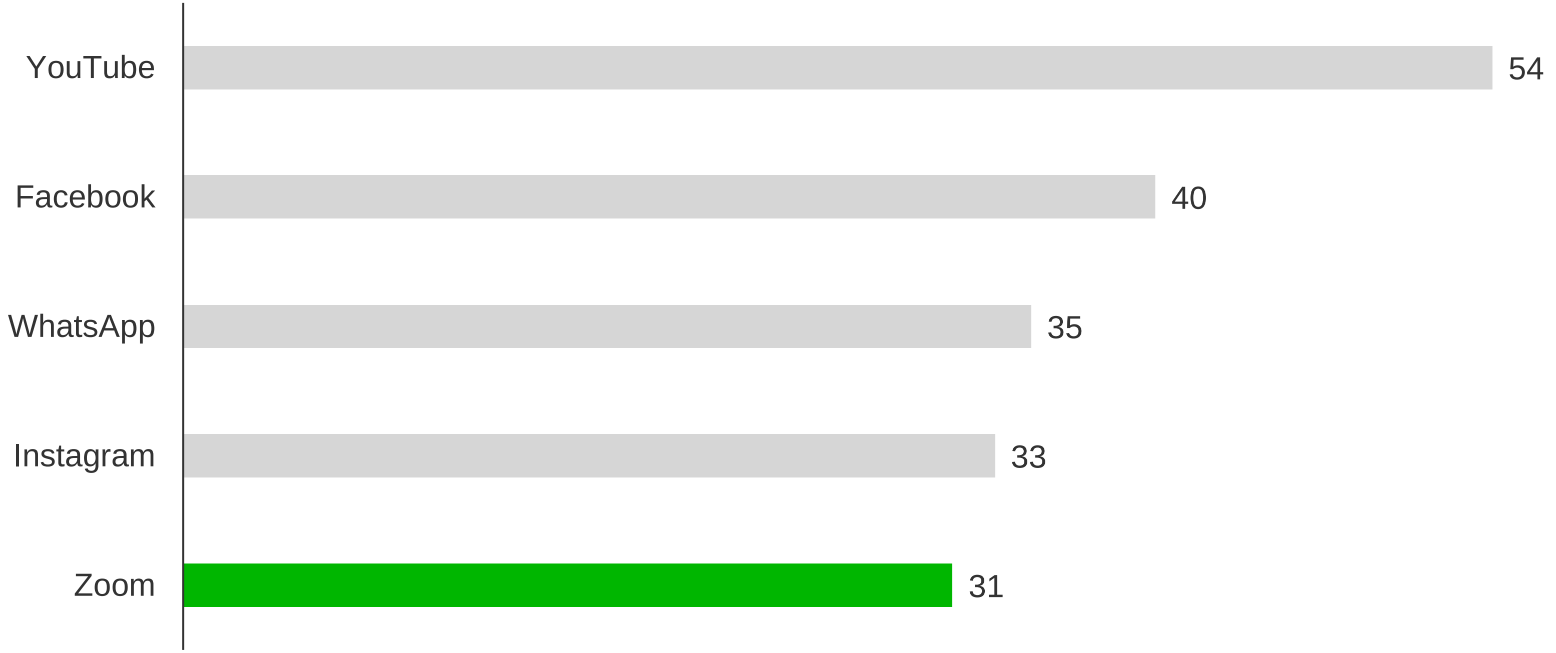
Source: Winning Omnichannel 2021

KANTAR

Q92. Compared to before the pandemic began, which of these behaviours are you now doing more of?
Q54: Which of the following would need to happen for you to feel safe to return to normal daily life?
Q5. In comparison to before the pandemic, how have your shopping habits at stores, supermarkets and shopping malls changed?

Zoom has entered the top 5 social networks and instant messaging systems that show a net usage growth compared to before the pandemic

Net usage score for Top 5

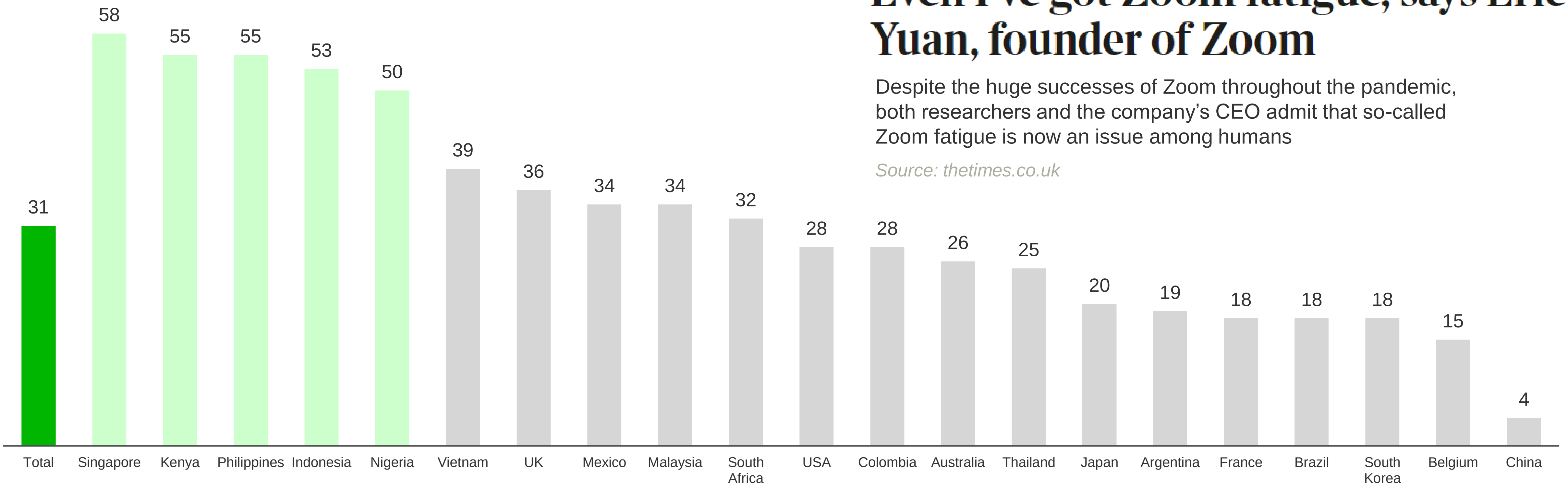


KANTAR

Q11: Thinking about social networks and instant messaging systems, how has your use changed, in comparison to before the pandemic? Net score = % of consumers for who usage has significantly increased vs. before the pandemic – % of consumers for who usage has significantly decreased vs. before the pandemic

Though Zoom is used more now than before the pandemic across all markets, especially in multiple African and Asian countries its net growth is striking

Net usage score for Zoom across markets



Even I've got Zoom fatigue, says Eric Yuan, founder of Zoom

Despite the huge successes of Zoom throughout the pandemic, both researchers and the company's CEO admit that so-called Zoom fatigue is now an issue among humans

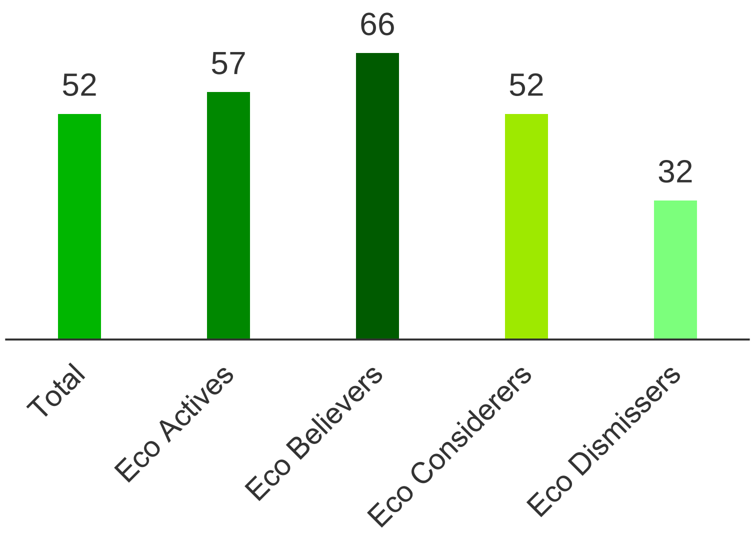
Source: thetimes.co.uk

KANTAR

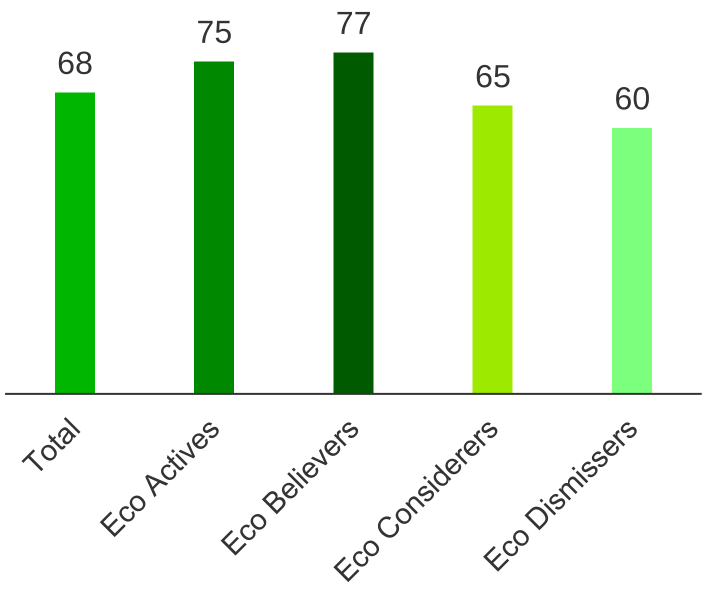
Q11: Thinking about social networks and instant messaging systems, how has your use changed, in comparison to before the pandemic?
Net score = % of consumers for who usage has significantly increased vs. before the pandemic – % of consumers for who usage has significantly decreased vs. before the pandemic

Localism, already a strong trend, received a boost for a variety of reasons; this is even stronger among environmentally conscious people

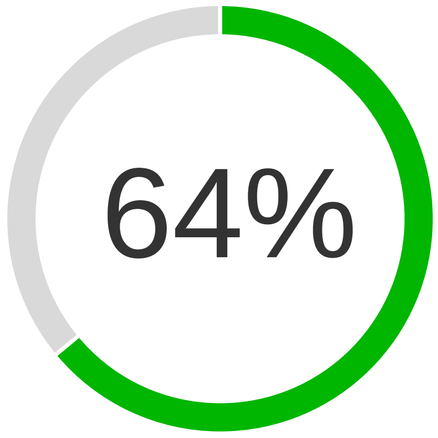
52% pays more attention to product origin now (compared to pre-pandemic)



68% now prefers supermarkets close to home (compared to pre-pandemic)



The majority of people think local stores are important for the community



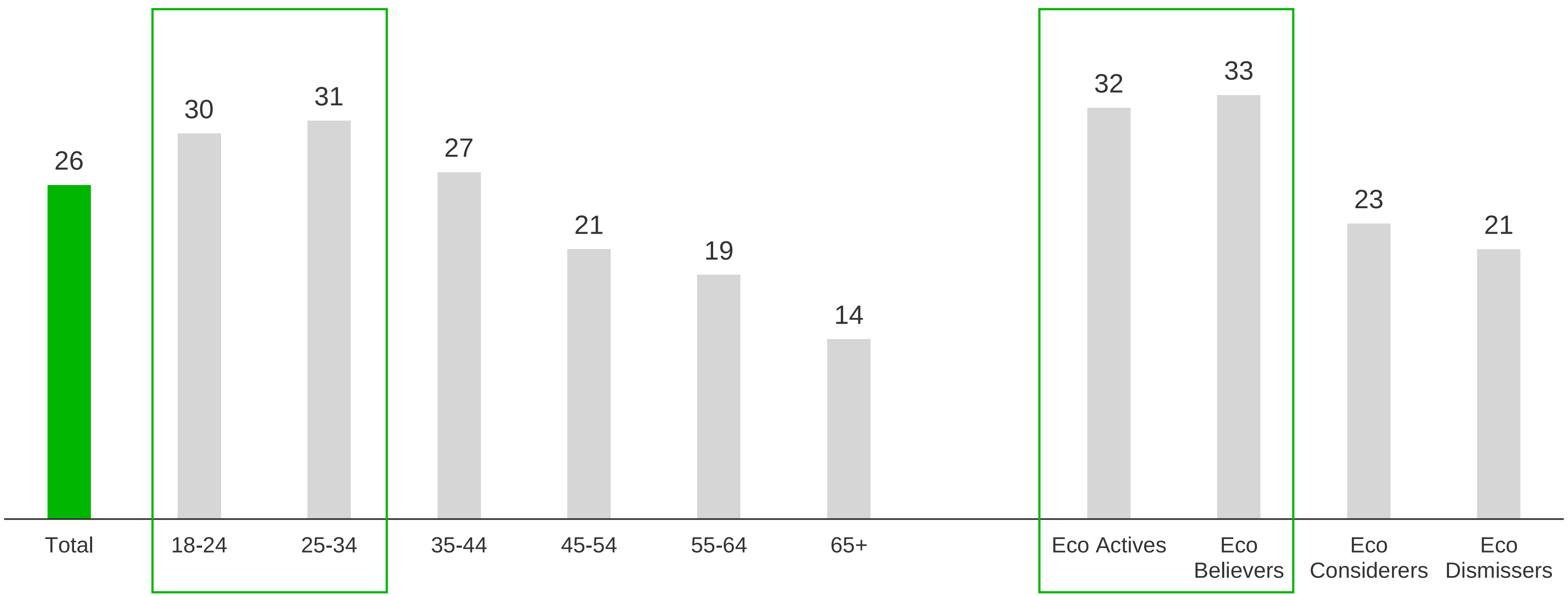
This is most important for Actives and Believers (73%) and less so for considerers (60%) and dismissers (58%)

KANTAR

Q5. In comparison to before the pandemic, how have your shopping habits at stores, supermarkets and shopping malls changed?
Q45. With the COVID-19 situation, …

Environmentally conscious people and the young are much more likely to buy second hand now rebranded as ‘Vintage’

% regularly buying second-hand products

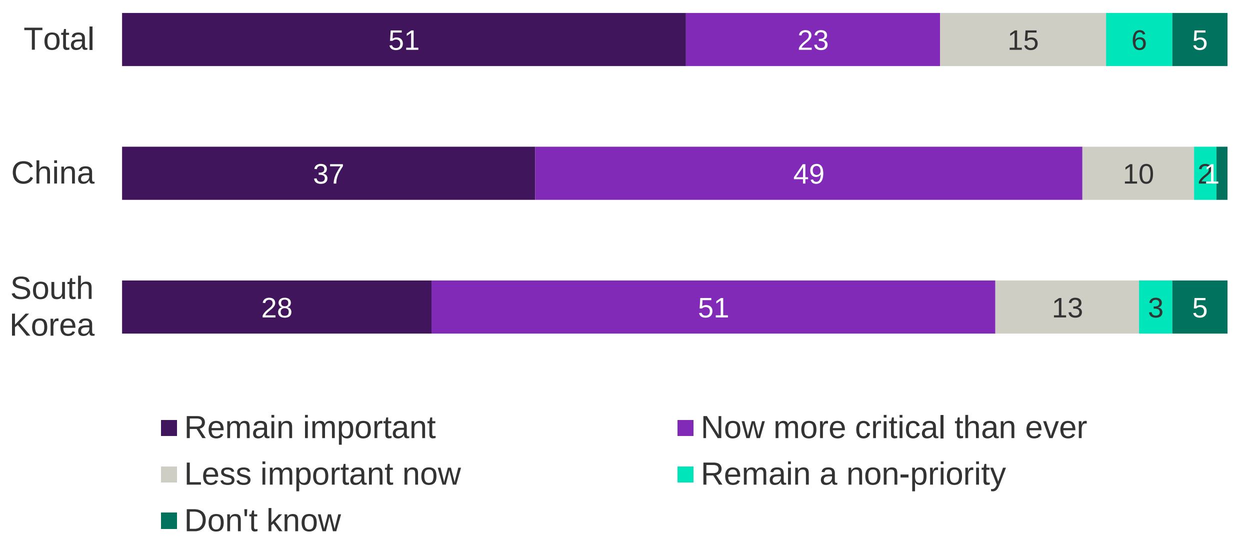


Q45. With the COVID-19 situation, I regularly buy second-hand products (in shops or online) – T2B

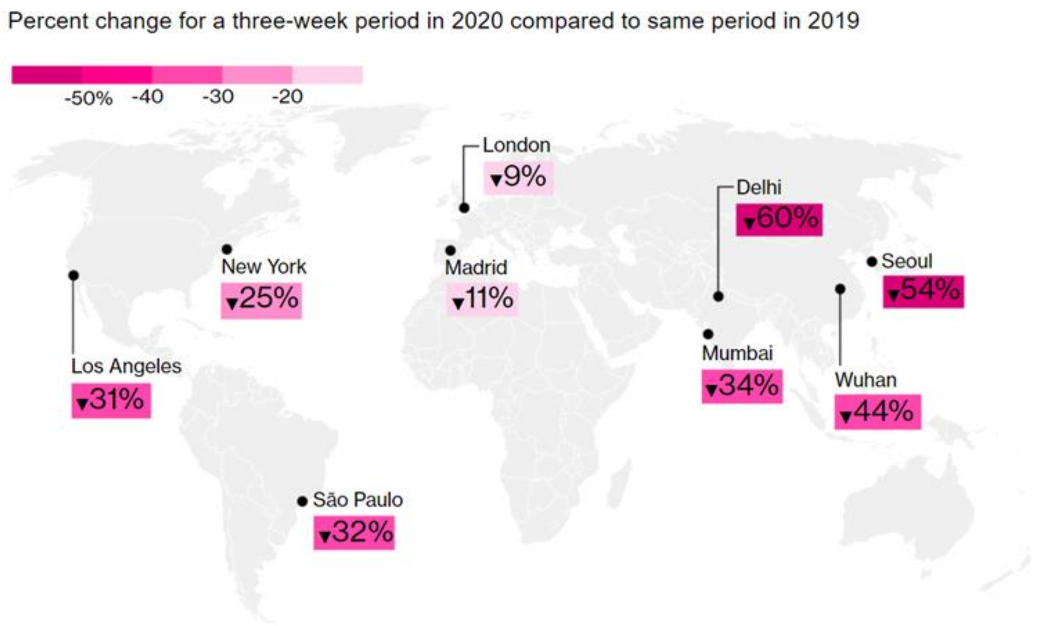
Concerns about environmental issues remain important during the pandemic

In China and South- Korea they're now more critical then ever, possibly related to the decrease in air pollution during lockdown

Has your opinion about environmental issues changed because of COVID-19?



Major cities see decrease in PM2.5 during COVID-19 lockdown



Use the sliders here to see how cities have transformed in lockdown

https://news.sky.com/story/coronavirus-before-and-after-how-lockdown-has-changed-smog-filled-skylines-11976473

Q85. Before the global pandemic, environmental concerns were a key topic for governments, companies, brands and people. Has your opinion towards worrying about environmental issues changed because of COVID-19?
Source: https://www.bloomberg.com/graphics/2020-pollution-during-covid-19-lockdown/

Not all our good intentions will come true

“Quarantine 15” has become a common way to refer to weight gain during the COVID-19 pandemic

Wave 3 (April 2020)

63% tries to eat healthier during lockdown

Wave 5 (May 2020)

Eating healthier was the second most likely behaviour to maintain post lockdown

Wave 9 (April 2021)

Now 22% says they are eating more healthily compared to pre-pandemic

How Much Weight Did We Gain During Lockdowns? 2 Pounds a Month, Study Hints

Many Americans know they’ve put on weight during the pandemic, but it’s been difficult for experts to detail the scope of the problem.

‘The Covid 15?’ If only — this is how much weight the average person actually gained during the pandemic

Last Updated: March 20, 2021 at 4:10 p.m. ET
First Published: March 12, 2021 at 12:48 p.m. ET

By Nicole Lyn Pesce

More than 2 in 5 adults packed on more pounds than they intended over the past year

KANTAR

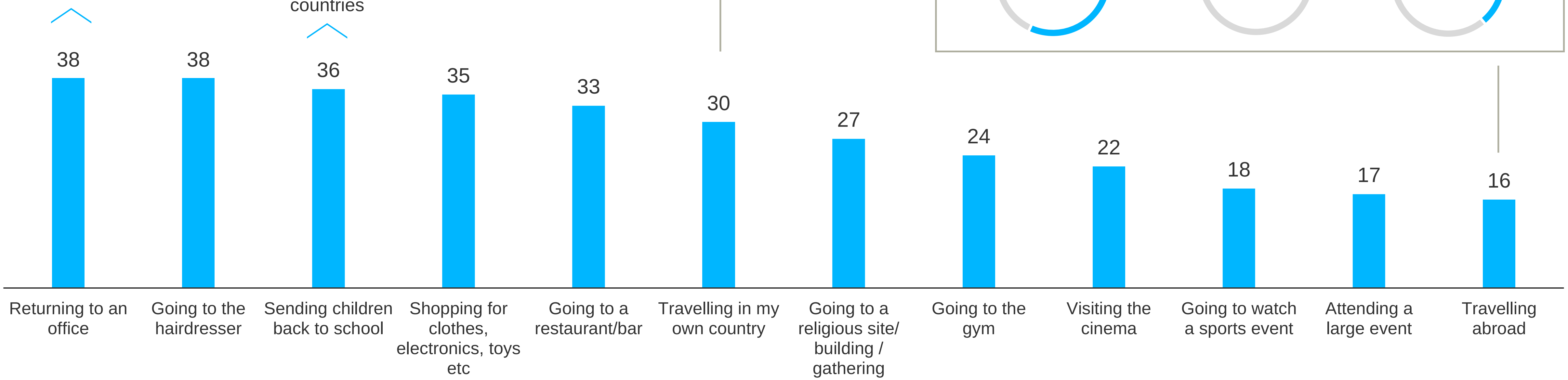
Q25. In comparison to last month, how have your eating habits in home changed? Q51. What are the behaviours that you think you’re most likely to maintain once the lockdown is over? **Q92.** Compared to before the pandemic began, which of these behaviours are you now doing more of?
Sources: https://www.nytimes.com/2021/03/22/health/virus-weight-gain.html / https://www.marketwatch.com/story/the-covid-15-if-only-this-is-how-much-weight-the-average-person-actually-gained-during-the-pandemic-11615574913

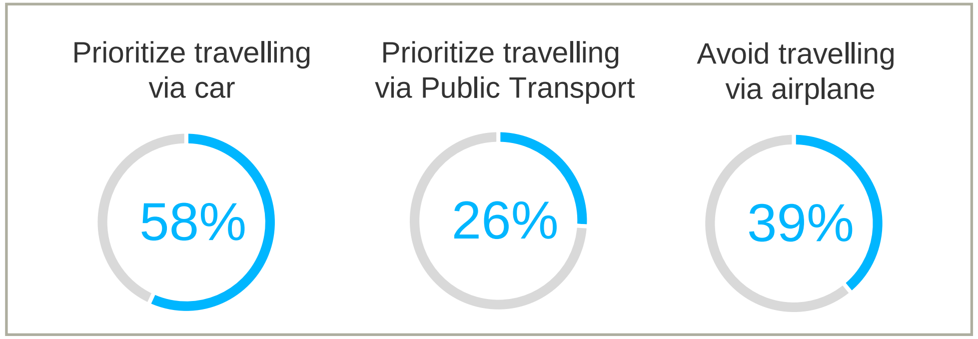
6
Looking forward and brand expectations

People feel most comfortable returning to ordinary day-to-day activities

They are least comfortable with returning to activities that involve (large groups of) people outside their direct social circle and perhaps where they have less control

What people would feel most comfortable doing as soon as possible..





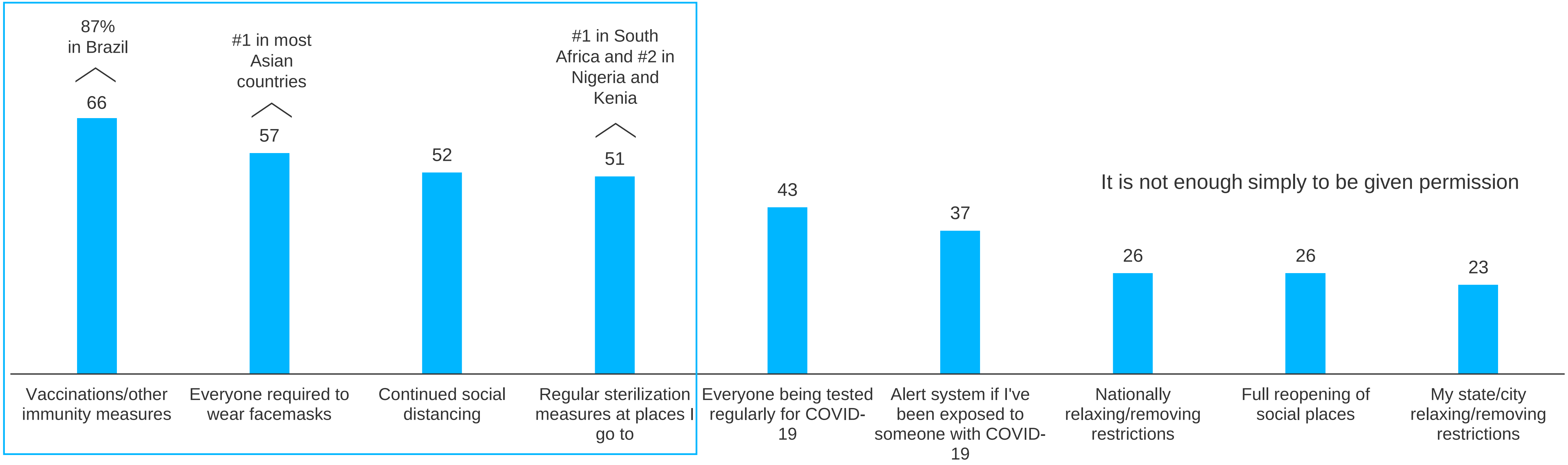
KANTAR

Q53: Assuming there were no longer any government restrictions, when would you feel comfortable doing the following? – As soon as possible
Q93: Thinking about your holiday planning - how will the way you take your holidays change in the next 12 months? T2B

Vaccination is key but the visible precautions we adopted during the pandemic remain essential for a safe return to normal daily life

Evidence of safety measures will be even more critical for businesses with an experiential aspect, such as retail, travel and leisure

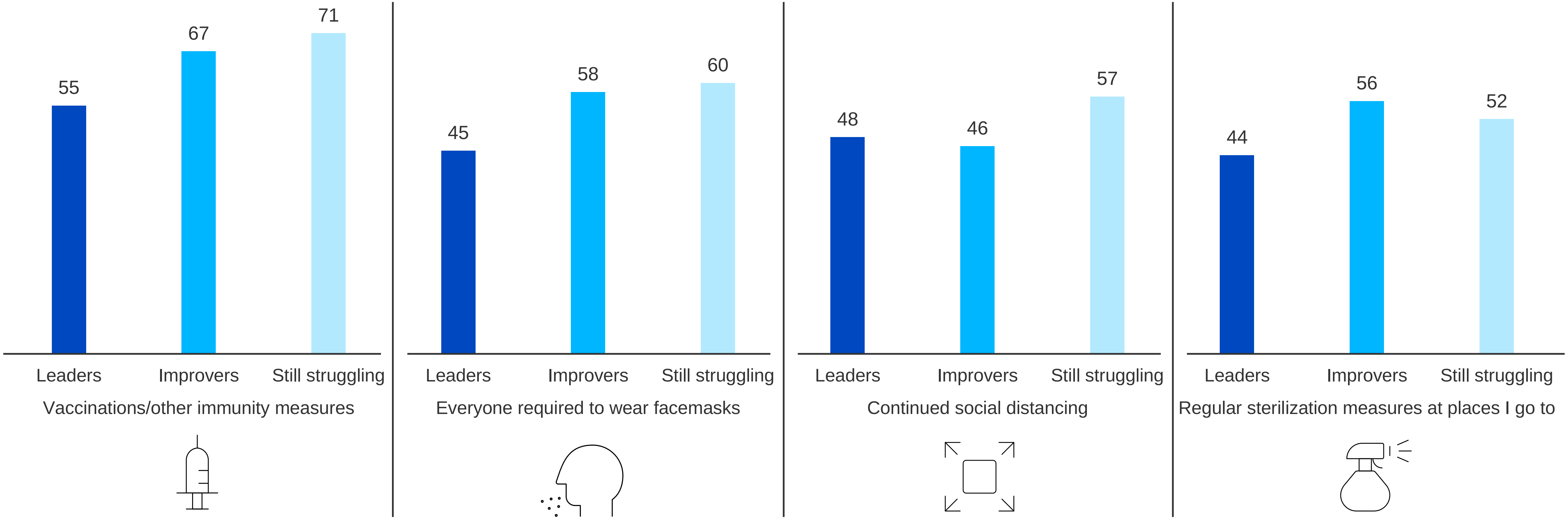
Which of the following would need to happen for you to feel safe to return to normal daily life?



Q54: Which of the following would need to happen for you to feel safe to return to normal daily life?

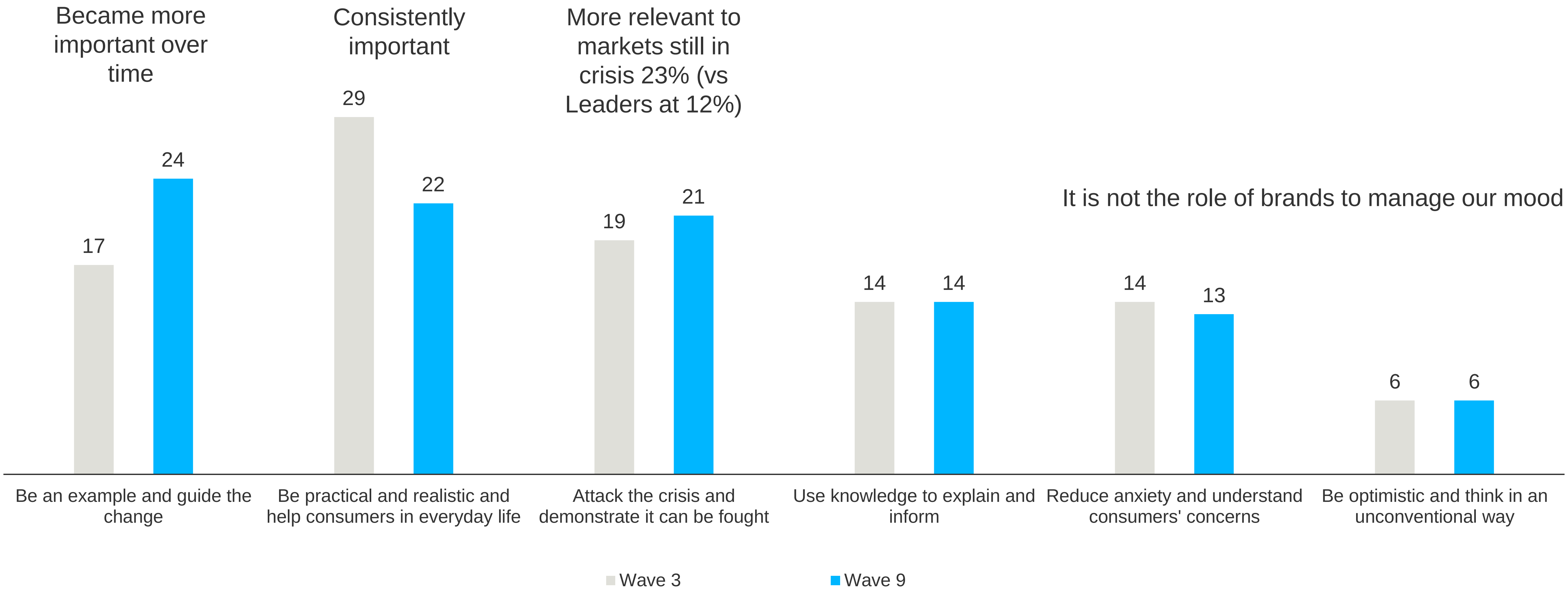
In Improving and Struggling countries, this tangible evidence of safety is even more important for return to normal daily life

Which of the following would need to happen for you to feel safe to return to normal daily life?



Q54: Which of the following would need to happen for you to feel safe to return to normal daily life?

For brands, there is an opportunity to offer leadership by setting an example

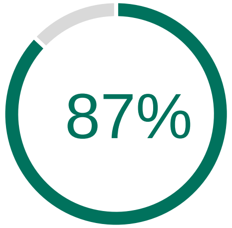


Q3: What is the main thing that brands should do at the moment? What other actions should be taken?

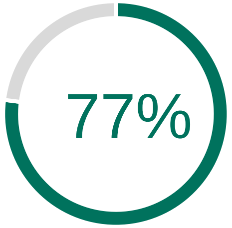
7
Country spotlights

- Brazil
- UK

The COVID-19 situation in Brazil is severe: high levels of impact and concern are accompanied by both high involvement and fear

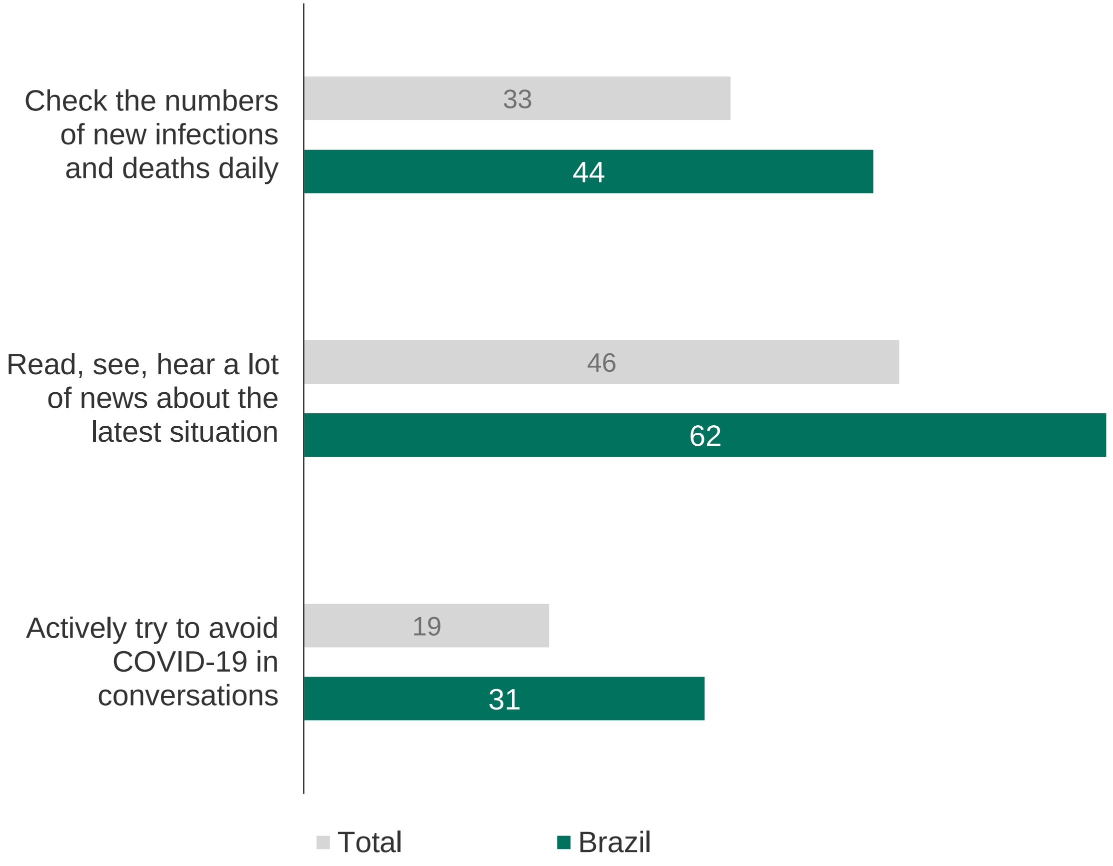


Affected by COVID-19 themselves, or someone close
(vs. 42% total)



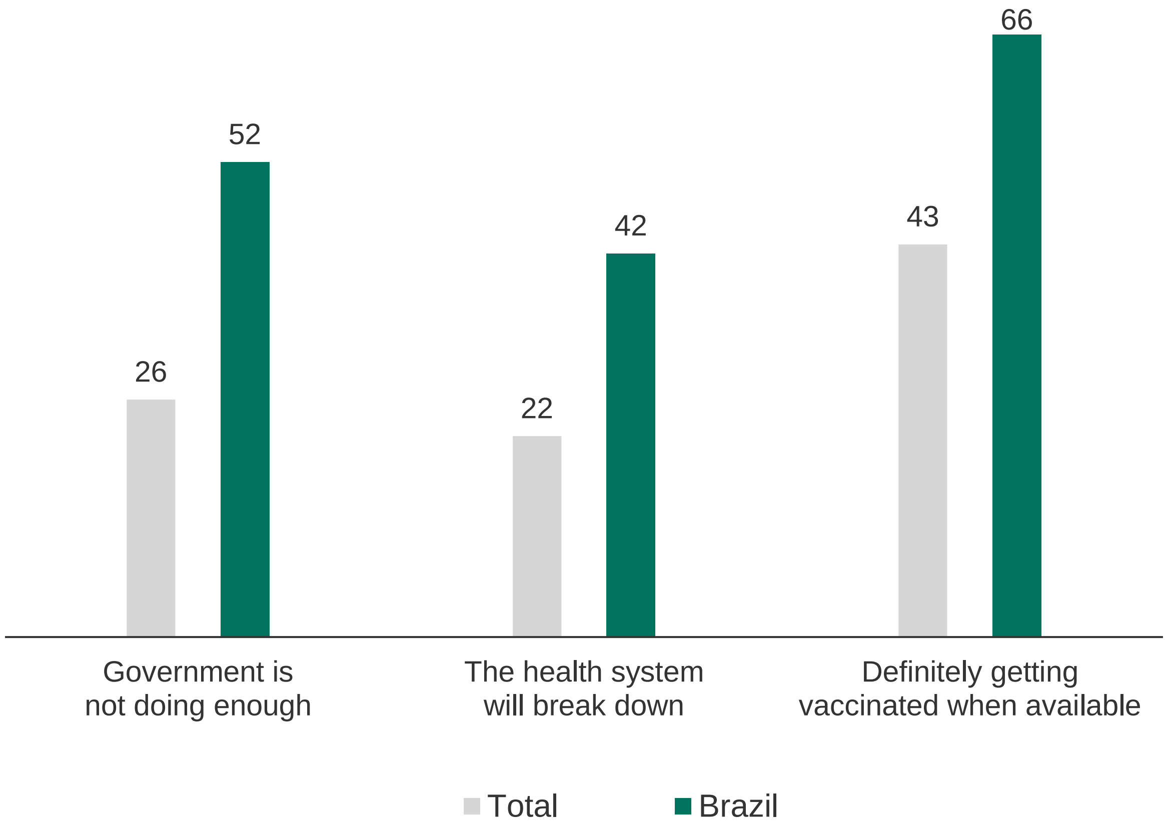
Experience **impact** of COVID-19 **on day-to-day life**
(vs. 63% total)

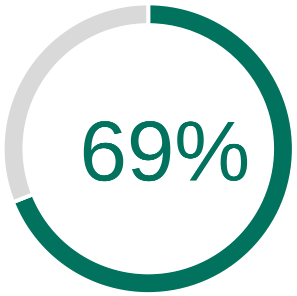
Are very scared about the situation
(vs. 31% total)



Q99: Since the start of the COVID-19 pandemic, have you or someone close to you contracted the virus?
Q1. Listed below are some statements describing people's concern towards the corona-virus situation. Please select the scale point that best reflects where your personal views fall between the 2 statements (T2B)
Q59: Which of the following best describes how you feel and behave in the current COVID-19 situation? (B2B)

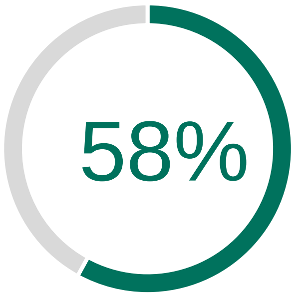
A low opinion of government response and fear for the health system are accompanied by high vaccine favourability and careful personal behaviours





Very careful to adhere to all health and safety measures
(vs. 58% total)

Get angry when they see someone else not adhering to the latest rules
(vs. 45% total)



Step away when people come close in public spaces
(vs. 45% total)

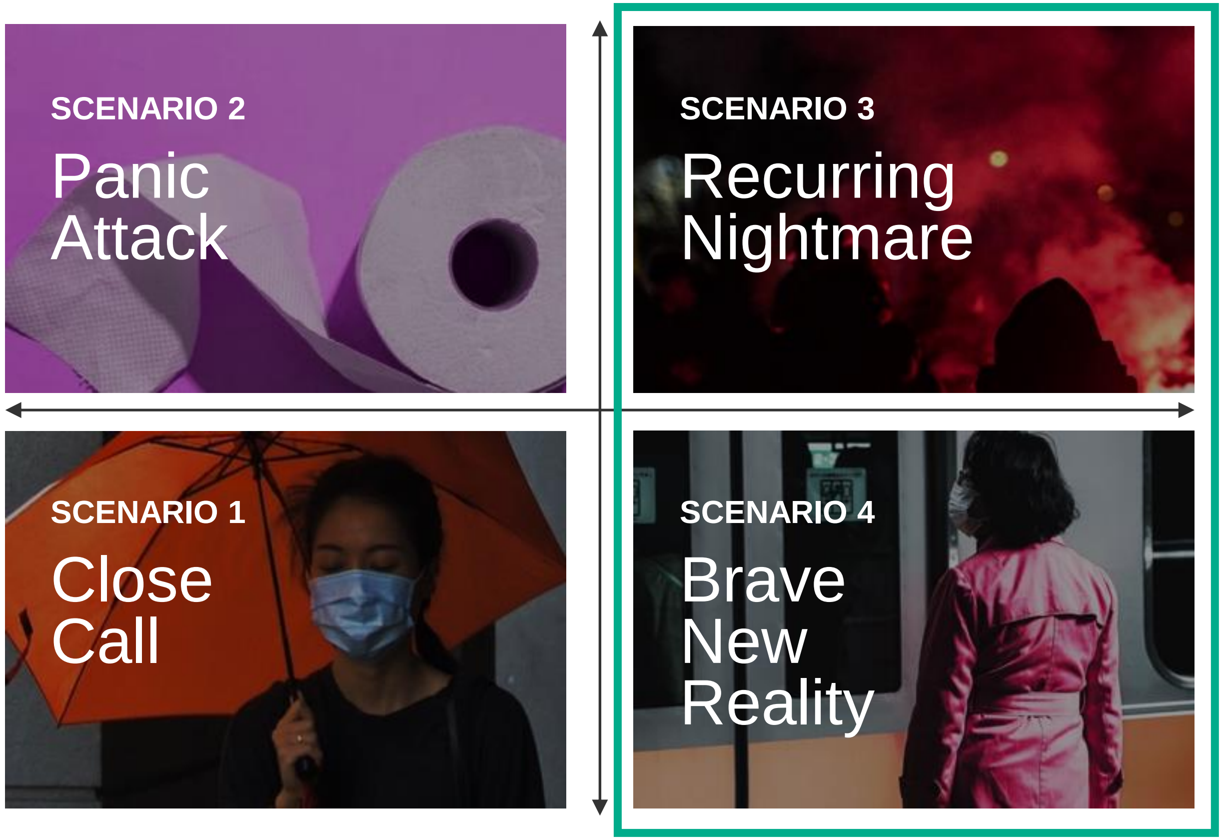
KANTAR

Q1. Listed below are some statements describing people's concern towards the corona-virus situation. Please select the scale point that best reflects where your personal views fall between the 2 statements (T2B) Q59: Which of the following best describes how you feel and behave in the current COVID-19 situation? (B2B / T2B) Q104: When a COVID-19 vaccine is available to you, how likely would you be to get it?

Brazil appears to be living the Recurring Nightmare scenario while the UK may have moved to Brave New Reality, through vaccination and lockdown

Panicked **Reaction,**
as systems struggle to absorb impact

Frequency
One-time outbreak

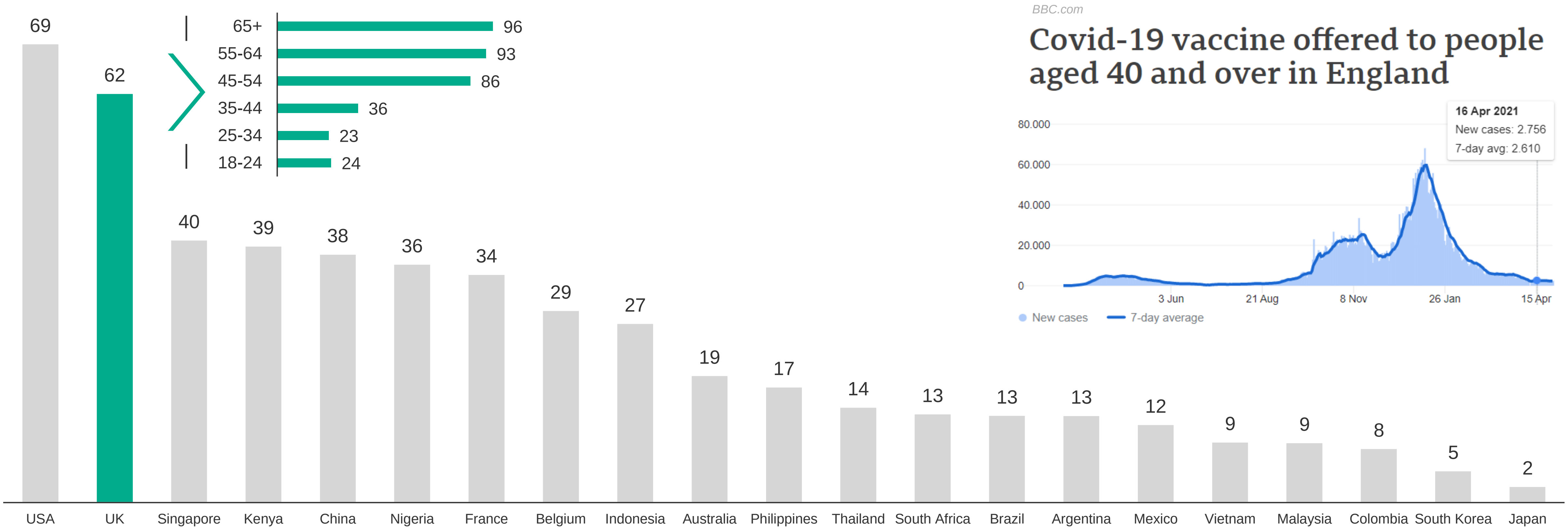


Frequency
Recurring or seasonal outbreaks

Controlled **Reaction,**
as systems manage to absorb impact

Vaccination programme in the UK is strong, with high and increasing availability (62%) and acceptance (85%) and a decline in vaccine hesitancy

95% of 50+ had been vaccinated by the time of our fieldwork

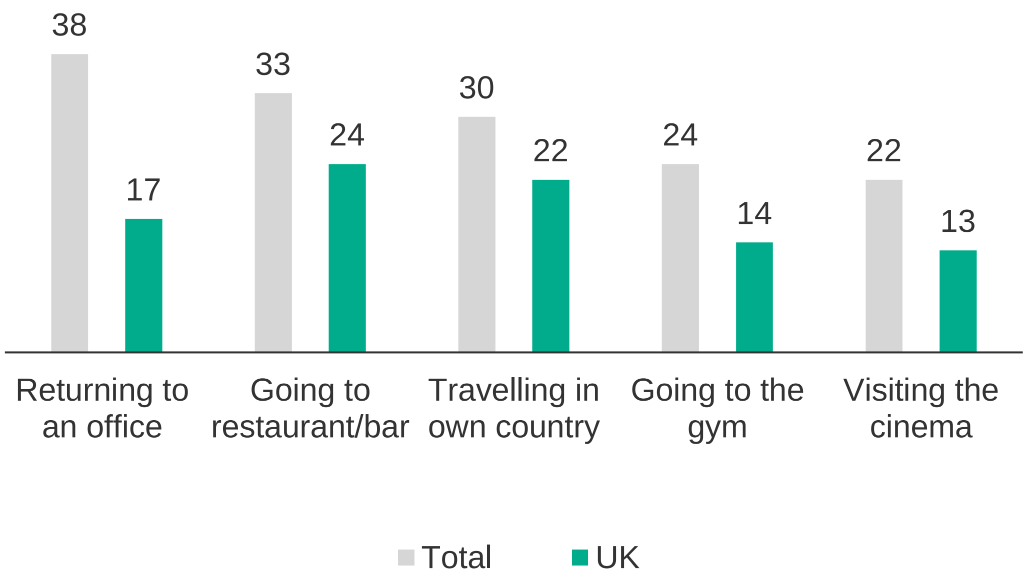


Q103: When do you think a COVID-19 vaccine will be available to you? – It's already available to me

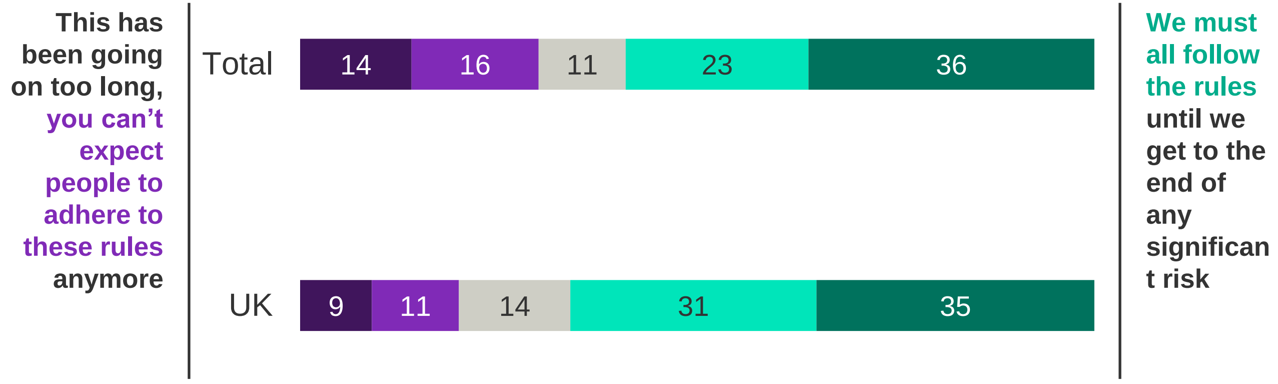
But despite a hugely successful vaccination programme, the British seem unusually reticent about returning to normal life very soon

Are the British institutionalized? Or have we invested so much we don't want it to be in vain...

Britain's feel less comfortable returning to activities as soon as they can



They're more likely to follow the rules until the end



KANTAR

Q53: Assuming there were no longer any government restrictions, when would you feel comfortable doing the following? – As soon as possible
Q54: Which of the following would need to happen for you to feel safe to return to normal daily life?
https://www.reuters.com/article/uk-health-coronavirus-britain-poll/britons-dont-plan-to-spend-all-their-lockdown-savings-poll-idUSKBN2CF2YU

8
Appendix

Research specifications

Fieldwork method

All data has been collected online

Fieldwork period:
- Wave 2: 27th-30th March 2020
- Wave 3: 10th-13th April 2020
- Wave 4: 24th-28th April 2020
- Wave 5: 22nd-27th May 2020
- Wave 6: 19th-23rd June 2020
- Wave 7: 17th-21st July 2020
- Wave 8: 14th-18th Aug 2020
- Wave 9: 15th-19th April 2021

Weighting

The data per country is nationally representative in terms of age, sex and region. Global averages represent the total of all countries, no weights are applied

Sample size

Wave 2: n=10,006
Wave 3: n=10,263
Wave 4: n=10,259
Wave 5: n=9,508
Wave 6: n=9,521
Wave 7: n=9,512
Wave 8: n=9,521
Wave 9: n=11,014

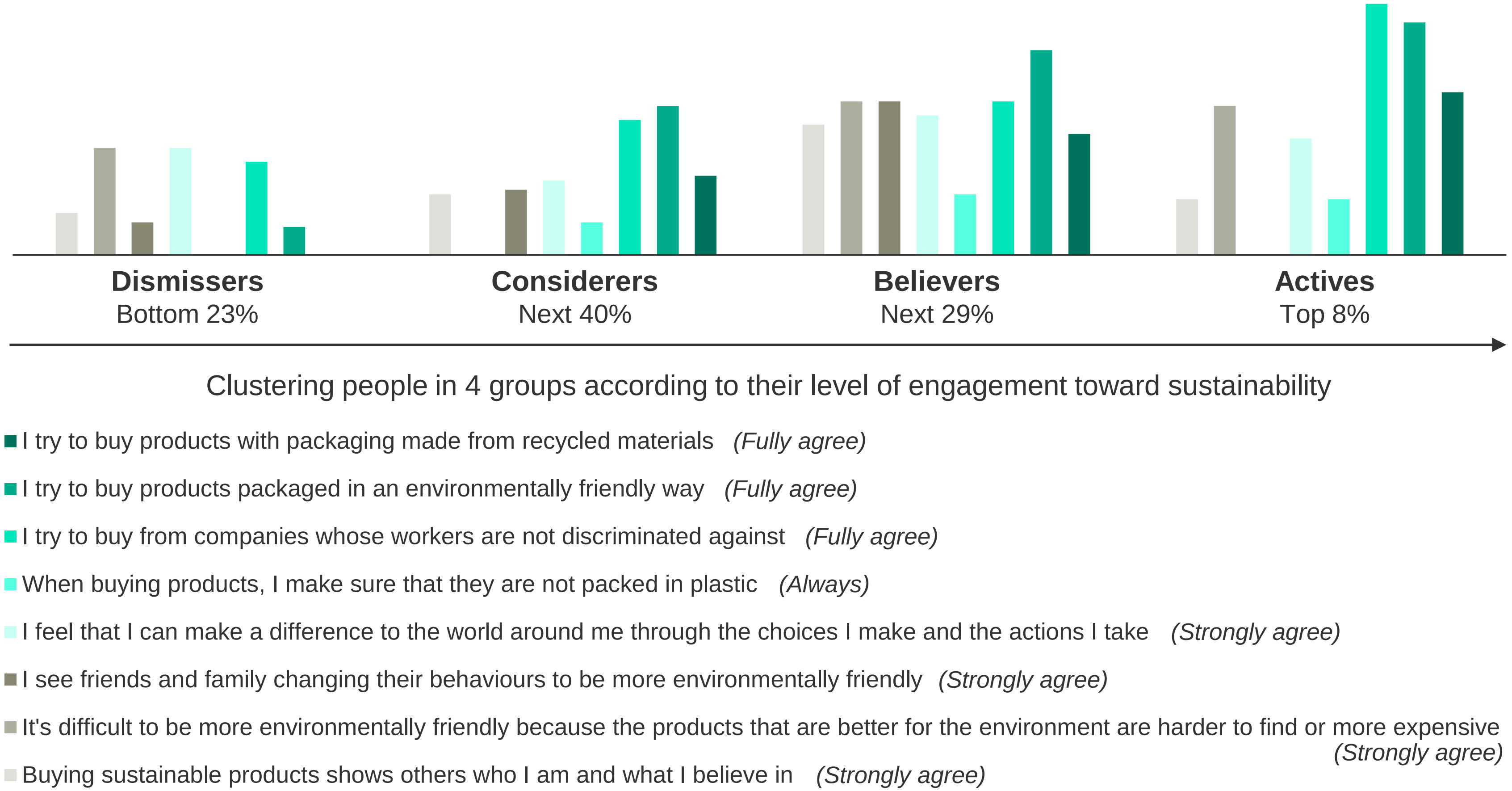
Markets incuded in this report:
Philippines, South Korea, Colombia, Malaysia, Japan, Thailand, Kenya, France, Argentina, Brazil, Mexico, South Africa, Indonesia, Australia, Nigeria, Vietnam, Belgium, UK, USA, Singapore

Per wave, per country we interviewed around n=500 consumers (for USA n=1,000)

Using Kantar's validated sustainability classification, we group people according to their level of overall engagement toward sustainability

We cluster people in 4 groups: 'Eco Actives', 'Eco Believers', 'Eco Considerers' and 'Eco Dismissers' - according to their level of engagement and commitment toward sustainability. The group called "Actives" are most active, intrinsically motivated. 'Believers' are also very active, but seem to be more extrinsically motivated. 'Considerers' are less active and involved. 'Dismissers' are the least active and involved with sustainability.

Each respondent is assigned an overall sustainability engagement score according to their answers to a battery of statements related to sustainability (below). This score indicates their position on the sustainability attitudinal continuum relative to the rest of the sample.



Markets in wave 9

	Wave 1 Mar. 14-19 2020	Wave 2 Mar. 27-30 2020	Wave 3 April 10-13 2020	Wave 4 April 24-27 2020	Wave 5 May 22-26 2020	Wave 6 June 19-23 2020	Wave 7 July 17-21 2020	Wave 8 Aug. 14-18 2020	Wave 9 April 15-19 2021
Argentina			X						X
Australia		X	X	X	X	X	X	X	X
Belgium	X	X	X	X					X
Brazil	X	X	X	X	X	X	X	X	X
China	X	X	X	X	X	X	X	X	X
Colombia			X						X
France	X	X	X	X	X	X	X	X	X
Indonesia		X	X	X	X	X	X	X	X
Japan		X	X	X					X
Kenya		X	X	X	X	X	X	X	X
Malaysia		X	X	X					X
Mexico			X	X					X
Nigeria	X	X	X	X	X	X	X	X	X
Philippines		X	X	X	X	X	X	X	X
South Korea	X	X	X	X					X
Singapore		X	X	X					X
South Africa	X	X	X	X	X	X	X	X	X
Thailand		X	X	X	X	X	X	X	X
UK	X	X	X	X	X	X	X	X	X
USA	X	X	X	X	X	X	X	X	X
Vietnam		X	X	X	X	X	X	X	X