

GLOBAL *TRENDS* REPORT

SPECIAL EDITION

COVID-19



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DYNATA'S GLOBAL TRENDS REPORT SPECIAL EDITION:

COVID-19 is a special edition of our flagship consumer trends report, exploring the changes in consumer attitudes and behaviors brought on by the Coronavirus pandemic. Spanning 14 countries, the report leverages Dynata's global scale, deep relationships with consumers, and the largest fully-permissioned first-party data set in the industry, to help you understand changes in consumer behaviors and attitudes during the COVID-19 pandemic.

In uncertain times, this special edition of our Global Trends Report - available in three installments - will deliver the insights you need to help make the best decisions as consumer trends evolve in response to COVID-19.

This is the question on the minds of many, and one we have no clear answer to. The subject of course is the current pandemic that 80% of us calls Coronavirus.

Across the 14 countries in our study very few, less than one in ten, thought it would be over within a month and life would return to normal. Larger numbers of people, around 25% in total, think a two-month window should be enough; extend it out to "within three months" and just under 50% think it will be over by then.

THE VIEW IN ASIA-PACIFIC

The most optimistic country is India, which is also the country in our survey where the fewest cases have been recorded (as of March 19th) by the World Health Organization. In China, the country most likely to emerge first from the pandemic, 10% thought it would be over in the next month.

As we cross the Pacific we find our most pessimistic country in our sample, Singapore. Singapore has about the same number of cases as Ireland, and a similar population, but fewer than 20% of Singaporeans expect the epidemic to be over within 3 months -- half that of the Irish. This illustrates that not just pure facts, but also the national psyche, and perhaps media coverage and tone, plays a part in forming attitudes and opinions. Japan, containing the virus very successfully to date, with fewer than 2000 cases (as of March 19th), and Australia both have around 30% thinking 3 months will see the end of it.

EUROPEAN PREDICTIONS

Italy, the European country with by far the highest number of recorded cases, is in line with the global view on this, while Spain is more bullish; over 33% of Spaniards believe it will have ended within two months, and 70% thinking within three months.

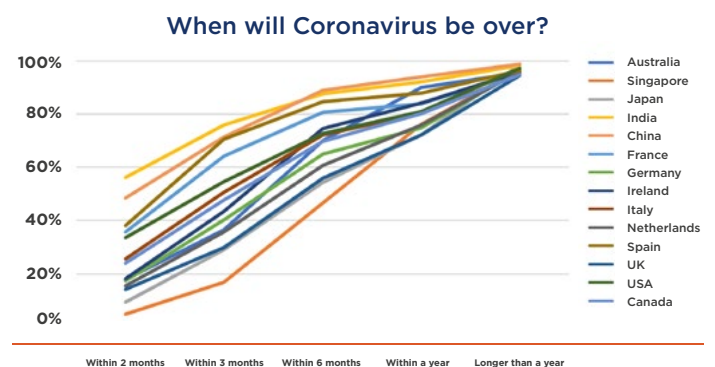
This is much the same in France also, which has recorded fewer cases to date. Near neighbour Germany, with half as many cases as France, is less positive about how long the crisis will continue; just 40% of Germans think the epidemic will be over in three months in their country. Both the Netherlands and the UK, and to some degree Ireland, are the least optimistic countries in Europe. About 33% of Dutch and British respondents, and 40% Irish, thought a three-month window would be enough. Of note, both the UK and the Netherlands are a little "behind the curve" (at least in total case numbers) compared to France and Germany.

NORTH AMERICAN BELIEFS

Looking at North America, the USA is slightly more optimistic about an early end to the virus than Canada, despite Americans reporting 10 times the number of cases as its neighbour to the north. Just over 50% of all Americans believe it will be over by mid-June, with just under 50% of Canadians sharing that view.

Almost everyone who has an opinion - over 95% of them - can't imagine the virus extending over a year.

Interestingly, there is a small group of people, in every country, who feel that life will never return to normal following the Coronavirus pandemic, and that we will be living in a new world.



NOTE: The survey includes 13,382 responses from 14 countries: the US, Canada, UK, Ireland, Spain, France, Germany, the Netherlands, Italy, India, Singapore, China, Japan and Australia.

