

GLOBAL *TRENDS* REPORT

SPECIAL EDITION

COVID-19



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 COVID-19 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 will deliver the insights you need to help make the best decisions as consumer trends evolve in response to the circumstances.



When will it all end?

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 call Coronavirus.

Across the 14 countries in our study very few, less than one in ten, thought it would be over within a month and that 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 the 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 2,000 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.

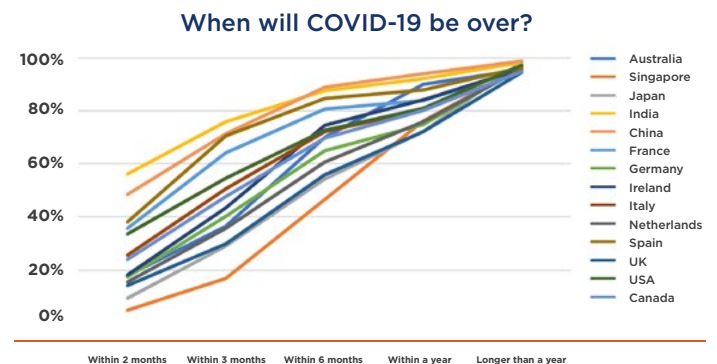
This is much the same in France also, which has recorded fewer cases to date. Near neighbor Germany, with half as many cases as France, is less positive about how long the crisis will continue; just 40% of Germans think the epidemic will be over in three months in their country. Both the Netherlands 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% – 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 COVID-19 pandemic, and that we will be living in a new world.



Global Economic Impact and Behavioral Changes

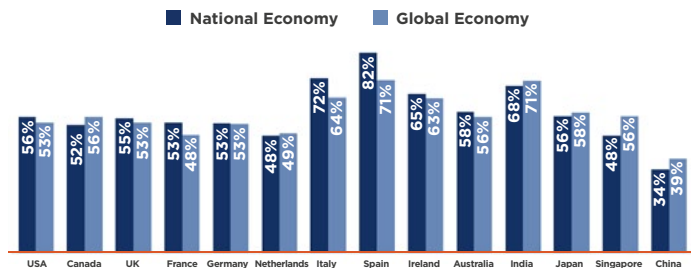
Asking questions about the perceived economic impact of the pandemic reveals differences related to how experienced the country is with COVID-19 and where they are on the pandemic curve.

THE ECONOMIC IMPACT: FINANCIAL WORRIES AND PURCHASE BEHAVIORS

Overall, 57% of everyone we surveyed are very or extremely worried about the economy in their own countries. Spain, which has had economic challenges, is by far the most worried: 82% of Spaniards are very or extremely worried. Not surprisingly, Italy is next with 72% very or extremely worried, followed by India at 68%. The figure for the USA is 56% and in a similar range to most of the countries we studied. The Netherlands and Singapore show lower levels of worry at 48% each, and China, further along in the cycle and with some businesses starting to re-open, is least worried with only 34% being very or extremely worried.

When we broaden the question to ask about the world economy, eight of the 14 countries we studied report similar levels of worry for both the global and local economy (Australia, Germany, India, Ireland, Japan, Netherlands, UK and USA) Those countries where worry for the world is greater than for their home country are Canada, Singapore and China (3, 8 and 4 percentage points worried more about the world respectively); those worried more for their own country are France, Italy and Spain (5, 8 and 11 points more worried about their own country respectively).

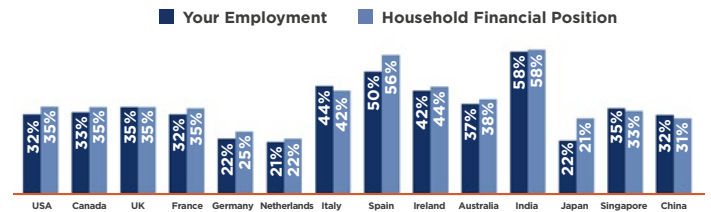
Very/Extremely Worried About The Economy



Looking at personal financial decisions 33%, in total, report having already put off making a non-essential purchase. Across countries, we see a wide range of behaviors, with 67% in Spain and 47% in China having done this, to only 15% in Japan, 17% in the Netherlands, 22% in the UK and 24% in

the USA. Looking at expenditures by category, it comes as no surprise to see that spending (either current or planned) is down for the majority on Travel, Vacations, Luxury Goods and Entertainment outside the home.

Very/Extremely Worried About Personal Finances



THE HUMAN IMPACT: FRIENDS, FAMILY, COMMUNITY AND HEALTHCARE

In looking at personal worries and behavioral changes, our results reflect some of the more common understandings of COVID-19. First is the belief that it is most dangerous for older people, with about 60% of all the people we asked very or extremely worried about the health of older family members or older people in the community, compared to 40% very or extremely worried about the health of young people in their households. Those in Spain show the highest level of worry on this topic, and those in Japan the lowest. 55% are very or extremely worried about their country's healthcare systems being able to cope, with Japan and Singapore least worried, and Spain and Ireland most worried. 61% of Britons are worried about their country's healthcare system being able to cope, compared to only 52% of Americans.

Secondly, while it's not surprising that most people are touching friends (64%) and strangers (69%) less in the past few weeks, in five of the countries we studied (France, Ireland, Italy, Netherlands and Spain), more than half are also touching their own family members less than they did a few weeks ago. The USA (30%) and China (26%) have similarly low scores on this metric, perhaps for opposite reasons. In the USA the magnitude of the crisis may not have been understood in the week of March 16th, while in China, most people are perhaps already practicing social distancing, even from family members. The younger members of our sample are somewhat less likely, by around 10 percentage-points, to be reducing touching their friends and strangers compared to the older generations.

THE PRACTICALITIES OF LIFE: SUPPLIES, WORKING FROM HOME AND SELF-ISOLATION

Around three in ten have already stocked up on food, with some countries doing this less than others. Only 11% of Dutch respondents reported stockpiling food and only 12% of Japanese, compared to just under 50% of Chinese and four in ten Americans, Italians, Irish and Indians.

In China 54% report they are considering stockpiling food. The percentage for all the other countries we studied is much lower, with between 11% and 40% considering doing this.

Of those who have stockpiled items, 71% have stockpiled water, and – to no one’s surprise – toilet paper is the leading household product most likely to have been stockpiled at 71%. Items stockpiled follow national tastes. Two out of three Brits who have stockpiled have bought tea, while over 90% of Chinese stockpilers bought rice, and the same proportion in Italy bought pasta.

Less than half of everyone we asked (44%) think people are overreacting to the situation, but there are big variations by country, ranging from 68% of people in India who think this to 26% in Italy.

If they must self-isolate, about three-quarters of Americans are at least slightly worried that they might run out of food but only about half are worried about what they would do all day, and just 36% are not worried at all about the impact on their mental health. This compared with Italy, a country still heavily in lockdown, where we see 79% worried they may run out of food, 66% worried about what they would do all day, and only 26% not worried about their mental health.

We see low levels of worry about working from home, with 26% overall worried about this and general consistency by country. However, this data was collected before widespread school closures and therefore before most people were faced with the realities of working from home while simultaneously caring for children.



Medical Knowledge and Trust



MEDICAL QUESTIONS:

DO YOU KNOW HOW TO PROTECT YOURSELF?

HOW WOULD YOU KNOW IF YOU WERE SICK?

With a pandemic of this nature, expected to affect large proportions of the populace and straining healthcare services, getting the right information out and understood by the population is vital. While many people may only experience a relatively mild illness, in some cases the effects could be extremely severe leading to many deaths. These uncertain times mean we all need to know what to look for, what to do and how to prepare ourselves.

Three quarters of Chinese and Italians in our survey, from the countries most affected by the pandemic to date, agreed that they knew everything they needed to know about how to protect themselves from contracting COVID-19. Other similarly well-informed countries include Spain, Germany, Ireland and Singapore.

The least well-informed nation is the USA, followed closely by Australia. There, fewer than six in ten agreed. On these scaled measures it can be hard to gauge the relative position of India and Japan since cultural factors come into play (see “Understanding Scale Usage Across Cultures”). Japan has the highest reported level of being not well informed, almost certainly due to cultural modesty and an avoidance of the most positive response. They also have the highest level of “disagreeing” that they know what to do, so they probably do feel uninformed. India, with a tendency to over-index, is probably not as well informed as they look based on the raw data.

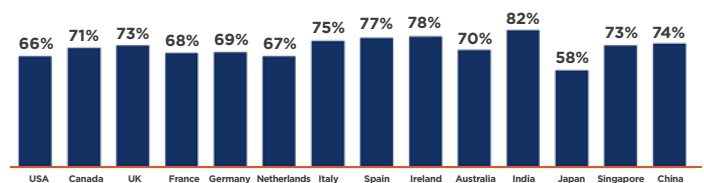
UNDERSTANDING SCALE USAGE ACROSS CULTURES

That different cultures tend towards different levels of acquiescent and extreme response styles on scales is well known. It is obvious from observing our data that the Japanese are modest in nature and tend not to select the most positive response, either when talking about themselves or regarding others. India, on the other hand, and China to a slightly lesser degree, tend towards acquiescence and extreme positive response. Other countries in the study undoubtedly have a cultural bias, but to a lesser degree from the average. Thus, interpretation of the data, particularly on these three countries, needs to be more nuanced than simply comparing the raw numbers.

In the event a person did contract the virus, seven in ten agree they know exactly what they should do. Italy, Spain and China are again highest (understandably so) along with Ireland. The USA is, again, noticeably lower, at just under two-thirds.

I would know exactly what to do if I had symptoms

■ Agree Slightly/Strongly



Younger people are less well informed about what they should do. Under two-thirds of 16-24-year-olds agree they know what to do, compared to three-quarters of the over-55s.

Young people were similarly less well informed about the nature of the illness itself. Just over six in ten 16-24-year-olds agreed that they had a good understanding of what sort of illness it would be, ten percentage points lower than the over-55s. On this dimension we observe a different set of inter-country differences. The USA, for example, has 73% agreement – slightly more than in China – and is amongst the best-informed countries. France is marked by a very low level of agreement, just under a half, lower even than Japan that is culturally under-indexing.

TRUST AND INFORMATION:

WHERE DO YOU GO TO GET NEWS ABOUT COVID-19?

WHO DO YOU TRUST AS A SOURCE?

AND DO YOU BELIEVE YOUR GOVERNMENT IS DOING A “GOOD JOB” DURING THE PANDEMIC?

People are getting information about the pandemic from a variety of sources. Official information from their government is being received by a little over half of our respondents. The highest proportions were seen in Singapore (67%), Ireland (65%), India (62%) and Italy (61%). It is interesting that these are also the countries more likely to be claiming to know what they needed to know. In contrast, the countries less confident about their knowledge were least likely to say they are getting information from the government. Fewer than one in five Japanese said they were getting government information and just over four in

ten Americans mentioned government information. The other countries ranked between 49% (Australia and the UK) and 60% (Canada). Perhaps surprisingly, there was no discernable difference by age.

TV was, far and away, the most popular source of information. In every country, at least three-quarters mention this channel. Here we do see a difference by age with older people more likely to be using this source. By contrast, younger people were much more likely to be using social media than their elders. As many 16-24-year-olds mentioned social media as mentioned TV, while among the over-65s three times as many used TV as used social media.

Social media was a popular information source for the Chinese (79%), Indians (77%) and Singaporeans (70%). It proved much less popular in France (32%), the UK (38%) and Japan (40%).

Trust in these sources was mixed, mirroring results from our full [2020 Global Trends Report](#). For TV it ranged from a high of 68% in India trusting “a lot” or “totally” through Germany (57%) and on down to lows of below 40% in the USA (38%), the UK (33%) and Spain (35%), and then down yet further to below one in three: Japan 22%, Australia 27% and Italy 29%.

Trust in social media was even lower. The “best” country (outside high rating India) was the USA with a mere one in four trusting what they were seeing on social media “a lot” or “totally.” In all other countries, bar Germany (22%), it was below one in five – sinking to a low of 14% in each of the UK, France, Ireland and Italy.

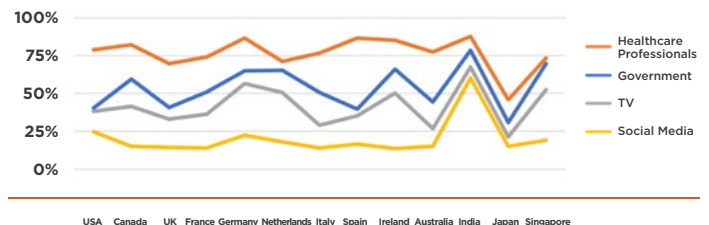
Government was the most trusted of the three but again with some distinct range by country. In Singapore, India, Ireland, Germany and the Netherlands, government information was trusted by more than two-thirds of those who had received it. On the other hand, in the USA, Spain, and the UK, only four in ten trust “a lot” or “totally” what they see from government.

Information from healthcare professionals was the most trusted source, but perhaps unfortunately, was the least utilized source.

In overall terms, governments appear to be getting a general seal of approval for the steps they are taking to protect the population. For the majority of countries over half agree that this is the case. Most countries do have around one in twenty who disagree that government is taking the right steps. This doubles to around one in ten for the USA (11%), Japan (10%) and the UK (10%). The Spanish government comes in for criticism, as 15% of Spaniards surveyed disagreed that their government was doing all it can to protect them.

This is, of course, a fast-moving situation and trust in governments is one vital area that we will be monitoring in the weeks to come.

Trust what I'm hearing (totally/a lot)



METHODOLOGY:

Research was conducted in 14 countries: USA, Canada, UK, France, Germany, Netherlands, Italy, Spain, Ireland, Australia, India, Japan, Singapore and China. The fieldwork was done between Tuesday, March 17 and Thursday, March 19. Total of 15,134 completes, with approximately 1,100 per market. Participants were selected from across all Dynata's proprietary online research panel assets and the samples quota controlled to reflect the population on Age, Gender and Region. Interviews were conducted online. The youngest age quota is 18-24.



dynata™

www.dynata.com

© 2020 Dynata, LLC. All rights reserved.