GWI

Coronavirus Research | July 2020

Multi-market research wave 5

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Introduction

Our fifth wave of coronavirus-focused research took place in polarized times; China, Australia, India, Spain were just some of the countries re-imposing local lockdowns following isolated outbreaks, the U.S. was seeing a surge in cases in some regions, much of Europe was attempting to open to tourists by operating travel "corridors", and parts of Latin America appeared to be struggling to contain the spread.

With many countries feeling that the worst was already over in late May when we conducted wave 4 of our research, how have these developments impacted sentiment and behaviors across 18 countries? Are feelings of hope and optimism as polarized as the status of the virus' spread? Have regional outbreaks or setbacks impacted the consumer's outlook on the global situation? And how are people feeling about the Black Lives Matter movement?

Fielded in 18 countries between June 29 to July 2, our fifth research wave takes the pulse in Australia, Belgium, Brazil, China, France, Germany, India, Italy, Japan, New Zealand, the Philippines, Poland, Romania, South Africa, Singapore, Spain, the UK and the U.S. We provide an updated view on many of the themes covered previously, as well as examining new topics such as worries over a second wave, and reactions to initiatives such as track-and-trace.

As with all of our dedicated research on this topic, the data and reports are free for everyone to access. You can share this report, cite it in your own studies / releases, or analyze the data yourself in our platform. And you can keep up-to-date with all of our releases via our portal.

Jason Mander, Chief Research Officer

Sample Sizes and Weighting

All stats in this report are from a GlobalWebIndex custom recontact survey among 15,271 internet users aged 16-64. By country, it includes the following sample sizes: 1,001 (Australia), 521 (Belgium), 1,008 (Brazil), 1,006 (China), 1,036 (France), 1,039 (Germany), 1,029 (India), 1,029 (Italy), 900 (Japan), 518 (New Zealand), 754 (Philippines), 531 (Poland), 502 (Romania), 506 (Singapore), 509 (South Africa), 1,013 (Spain), 1,012 (UK) and 1,357 (U.S.).

We looked to collect 1,250, 1,000, 750 or 500 responses per country, allowing us to be in-field for the shortest possible time and bring the results to you as quickly as possible. We have weighted the responses in each country according to our usual age, gender and education framework. In some countries, we collected relatively few responses in the 16-24 or 55-64 age groups; where necessary, we have therefore combined weightings with adjacent age groups. This is in the interests of speed so that we can bring you results as soon as possible, rather than wait for all quotas to fill up.

Trended Data

This is our fifth release of multi-market data, following Wave 1 which was fielded in mid-March in 13 countries (Australia, Brazil, China, France, Germany, Italy, Japan, Philippines, Singapore, South Africa, Spain, UK, and U.S.A.); Waves 2 and 3 which were fielded in 17 countries (the same 13, plus Canada, India, Ireland, and New Zealand) between March 31 – April 2 and April 22 – 27 respectively; and Wave 4 (in the same 17 countries as Waves 2 and 3, plus Belgium, Poland, and Romania, between May 19 – 26).

Most of the questions included in Wave 5 were also included in Waves 1, 2, 3, and/or 4; therefore, where possible we have shown trended data.

Accessing the Data Behind this Report

GWI wants anyone who needs this data to have access to it. Therefore, anybody – regardless of whether they are a client or not – can access the results from this survey in our platform.

Clients can access it via their usual account, and will find it under the "Custom" section; because all respondents have previously completed our Core survey, you can cross-analyze the results of the two surveys. Non-users can sign up for a free account and will be able to analyze the results of this study.

NOTE: Some totals in this report might exceed 100% due to rounding.

Audience Definitions

Generations:

- Gen Z – 16-23 years-old
- Millennials – 24-37 years-old
- Gen X – 38-56 years-old
- Baby boomers – 57-64 years-old

Income (based on annual household income):

- Lower income – lowest quartile of household incomes
- Higher income – top quartile of household incomes

Country Abbreviations

In tables which display county-level data, we have abbreviated country names as follows:

All	Global average across all 18 markets	NZ	New Zealand
AU	Australia	PH	Philippines
BE	Belgium	PL	Poland
BR	Brazil	RO	Romania
CN	China	SG	Singapore
FR	France	ZA	South Africa
DE	Germany	SP	Spain
IN	India	UK	United Kingdom
IT	Italy	USA	U.S.
JP	Japan		

Key Insights

At a glance...

- **Concern about the national situation** is at its lowest level yet in 6 of the 15 markets tracked since March.
- Consumers in every single country now expect the **outbreak to last longer** than they previously thought it would.
- **Levels of optimism are stable or falling**, with Australia, New Zealand and the U.S. having seen some of the biggest decreases wave-on-wave.
- Two thirds of consumers are extremely, very, or quite concerned about a **second wave** of the pandemic.
- There's **greater positivity about personal finances**; fewer people in most countries now expect the pandemic to have a big or dramatic impact on their personal finances.
- **Delaying big purchases** remains the most common financial response to the crisis; 80% globally say they are doing this. That's against a backdrop of nearly 6 in 10 globally saying the outbreak has had some financial impact on their job.
- The **activities which people say they are most likely to continue spending more** time doing after the outbreak are socializing as a family (29%), watching more videos (24%), watching more shows on streaming services (24%), spending more time cooking (23%), and watching more news (23%).
- Fewer than 15% of consumers disapprove of brands **advertising as normal**.
- Almost 3 in 4 support governments using **track-and-trace systems**, but there's stronger opposition in parts of Europe.
- Views about **reopening large indoor venues** are polarized; 4 in 10 support this, but the same number oppose it.
- **Vacation plans** for the next year are dominated by domestic vacations (48%) and local staycations (32%).
- **Out-of-home leisure spend** remains under strong scrutiny; 4 in 10 expect to eat out at restaurants less frequently after the pandemic is over – a figure which is trending up in 13 of 18 markets.
- Globally, 50% expect to **shop online** more frequently after the outbreak is over.
- 6 in 10 Gen Zs and Millennials express strong interest in enrolling in **online learning programs**.
- Over 40% of consumers in 16 of the 18 markets surveyed express a strong interest in **working from home permanently**.
- Around 20% of people in countries like the U.S. and UK say that the **Black Lives Matter movement** has made the issue of tackling racism more important for them – with a further third stating that it was already important to them prior to this.
- When asked what brands should be doing to **support the Black Lives Matter movement**, 85% of consumers think they should undertake at least one of the eight initiatives that were listed. The most popular are supporting local / national community initiatives, showing support via social media, and ensuring diversity in their leadership / management teams.
- Almost 3 in 4 think it's more important than before the outbreak for companies to **behave more sustainably**. A similar proportion say the same about reducing their personal carbon footprint.

In detail….

Levels of domestic concern have dropped to their lowest levels yet in some countries

- Across the five waves of research – spanning mid-March to early July – some countries are now recording their lowest levels of concern about their own domestic situation. These include France, Germany, Italy, New Zealand, Spain, and the UK. Most of these places are seeing sustained success in reducing cases / deaths. However, the pattern in Australia and China shows how quickly concern can begin to spike again; both countries have seen a 4-5 point increase in concern since May, driven in part by the reintroduction of restrictions in areas such as Beijing, Victoria and New South Wales. Evidently, levels of concern are volatile and will reflect national / local developments very rapidly.
- Concern remains highest in places like Brazil and India, both of which have seen struggles in limiting transmission. Interestingly, the U.S. has seen a 5-point drop since May, despite record levels of new cases. However, this is being driven heavily by political affiliation; while over 70% of Democrat voters report being very or extremely concerned, this drops to just a third among Republican voters.
- Levels of concern about the global situation remain consistently high everywhere. Belgium, France, Germany, Poland, Romania and the U.S. record the lowest levels of about 65-75%. But the figure still passes 90% in 5 of the 18 markets surveyed. Brazil, India and the Philippines are the only places where concern about one's own country is equal to, or higher than, concern about the global situation.

Consumers are expecting the situation to last an increasingly long time

- In every country surveyed, the length of time that consumers expect their national outbreak to last for is growing. Since May, the numbers thinking it will last 6 months or longer in their country have risen by more than 10 points in Australia, Belgium, Brazil, China, India, Japan, New Zealand, Poland, Romania, Spain and the U.S.
- Two of the biggest wave-on-wave increases are in China (+14 points) and New Zealand (+17 points), indicating that expectations have sobered even in the countries which have had the most "success".
- Overall, every country still expects the global situation to take longer to resolve than the one in their own country, but the differences are becoming smaller.

Optimism is stable or falling

- Since May, most countries have seen little change in their levels of optimism about overcoming the virus in their own country. However, there have been notable declines in Australia (-9 points), New Zealand (-10 points), Romania (-15 points) and the U.S. (-9 points). In part, this could be driven by the longer periods of time that people think will now be needed. But with countries like the UK and Spain also seeing drops, we could also be seeing the impact of lingering localized outbreaks, or in the case of the U.S. the failure of certain regions to suppress transmission.
- China remains by far the most optimistic about its domestic situation on 90%. New Zealand is second on 73%. Figures in many other markets are between 30% - 50%.
- Compared to the figures recorded in May's wave 4, optimism about the global outlook is down a little in almost every country. More pronounced drops are seen in New Zealand, Poland and Romania.

Personal financial outlooks remain broadly positive

- When asked about the impact that they expect coronavirus to have on their personal / household finances, outlooks are still broadly optimistic. In just 3 of the 18 countries do more than half of consumers expect it to have a big or dramatic impact; and in 5 of the 18 (China, France, Germany, UK and the U.S.) it's a quarter or less who are expecting a hit of this magnitude.

- Figures in most countries have improved a little since May, with the U.S. in particular seeing a 10-point reduction in those expecting a big or dramatic impact.
- In terms of the impact predicted for the national economy, figures in all countries remain high but are typically trending down a little. That said, there are still 7 countries among the 18 where 90%+ think their economy will take a big hit.
- Germany and China stand out as exceptions for being the most positive about their national economies.

8 in 10 globally delaying big purchases

- Across the 18 markets surveyed, an average of 80% say they are delaying big purchases because of the pandemic, a behavior which is most common among Gen Z, Millennials and the higher income group.
- Under 10% say that they're not making *any* financial change, with other popular measures being to cut back on day-to-day purchases, reduce regular financial commitments, use savings, and wait for products to be on promotion.
- These financial decisions need to be viewed against the backdrop of about 6 in 10 reporting that the outbreak has had some impact on their job. By far the most common are paycuts (27%) and reductions in working hours (24%). Both of these see their highest figures among Gen Z, Millennials and the higher income group – the same three cohorts who were most likely to be delaying big purchases.
- By age, Gen Z and Millennials stand out for being disproportionately impacted by most of the factors impacting jobs. However, among the two, Millennials are more likely to have had bonuses or payrises deferred, whereas Gen Z are more likely to have lost their job.

Videos, streaming services, cooking and socializing could see the biggest post-pandemic boosts

- Since the first two waves of this research in March and April, the numbers saying they are spending more time doing various in-home and media consumption activities have trended downwards. While this is to be expected as restrictions eventually ease and people become bored of certain activities, there are strong indications that some areas in particular could be set to enjoy a permanent post-pandemic boost.
- When asked which activities they intend to carry on with after the pandemic is over, it's over 20% globally who say they will spend more time cooking (23%), spend more time socializing as a family (29%), watch more news coverage (23%), watch more content on streaming services (23%), or watch more videos (24%). Social media services and messaging apps also score close to 20% each.
- There are nevertheless very strong age effects at work here. For example, while 11% of Gen Z expect to spend more time in the future creating or uploading videos to services such as YouTube or TikTok, that falls to 1% among Boomers. The youngest generation is also twice as likely as the oldest to say they will spend more time on Netflix-style services. In fact, Gen Z typically takes the lead for most digital-oriented activities – which makes the fairly equal generational numbers seen for cooking rather noteworthy.

3 in 4 support track-and-trace systems

- There is broad support for the usage of tracing apps in order to identify and contact people who have potentially been exposed to coronavirus. Almost 3 in 4 globally say they support this initiative, peaking at over 90% in China, India and the Philippines.
- Support is lowest in several European countries, where privacy concerns are typically some of the most pronounced. Figures dip below 50% in Belgium, France, Japan, and Poland. Indeed, "strong" opposition is most visible in France and Poland, at around a quarter.

- This activity also polarizes people by age; whereas 45% of Gen Z express strong support, that figure drops to 30% among Boomers.

4 in 10 don't support large indoor venues being reopened

- Attitudes towards the reopening of large indoor venues are starkly polarized; while 4 in 10 globally say they support this, the same number say they oppose it.
- High levels of opposition in places like Brazil (54%) and the U.S. (53%) are perhaps to be expected in the context of persistently high transmission rates in both countries. But with figures similarly high in a range of other countries – including Germany (50%), the Philippines (51%), Singapore (50%), South Africa (54%), and the UK (55%) – it's clear that consumers in many places remain uncertain about this.
- It's telling that opposition increases in line with age – reflecting a trend we've seen throughout this research whereby health and safety concerns become more pronounced as generational age increases.

Vacation plans dominated by domestic trips and staycations

- When asked about their vacation plans in the next 12 months, consumers are most likely to take domestic vacations (48%) or local staycations (32%). These numbers dwarf the equivalents for foreign short-haul (13%) or foreign long-haul (9%) trips.
- Domestic vacations are most popular of all in parts of Europe (including Romania, Spain and Poland), as well as in China and New Zealand. The latter suggests that consumers in "successful" countries are looking inwards to ensure their plans are safeguarded.
- Short-haul trips to another country have particular appeal in Singapore (as might be expected for geographical reasons) as well as parts of Europe – including Belgium, Germany, and the UK. This suggests that current efforts to establish travel "corridors" will be particularly appealing for Europeans in the northern part of the continent looking for escapes to sunnier climes in the southern part.
- Compared to wave 4 in mid-May, the appeal of domestic vacations has remained stable in most countries, showing that intentions aren't changing even as many countries ease their lockdowns and attempt to restart a degree of international travel.

Out-of-home leisure spending is being scrutinized – whereas online shopping is up

- Around 7 in 10 consumers expect to make changes to their post-pandemic out-of-home leisure spending, based on the five activities we asked about (cinema, bars, fast-food, restaurants, gyms). From the consumer's perspective, the most likely changes they would make are eating at restaurants less frequently (42%) and visiting the cinema less often (38%).
- Across April, May and June, we have asked consumers about their intentions in this area on three separate occasions. For out-of-home leisure providers, the concerning trend here will be that figures are climbing in several markets. If we take restaurants as an example, figures have continued to move up consistently in 12 of the 18 markets. That means that even as many countries on the list have begun to reopen venues, consumers remain reticent. A marketing proposition which emphasizes safety, value and promotions could well be required, based on the sentiment we've seen elsewhere in this research.
- In contrast, the numbers saying they expect to shop online more frequently in the future are consistently trending up in most countries. It's about 50% globally who say they will do this, with 16 of the 18 countries surveyed recording their highest figure for this activity in this most recent wave.

Online learning, permanent work-from-home and public transport alternatives all register strong interest

- 6 in 10 Gen Zs and Millennials say they are extremely or very interested in enrolling in online learning programs and courses. What's more, just 15% of Gen Zs say they are not interested (compared to over 60% of Boomers). Perhaps unsurprisingly, such a proposition is of most interest in markets like India, Brazil and the Philippines, all of which are home to comparatively young, aspirational online populations.
- With many companies having to switch to remote working during the pandemic, it's just over 50% of consumers who express strong interest in working from home permanently. Age is once again a significant determiner over this, but only in two countries (Belgium and Japan) do levels of strong interest fall below 40%.
- There's also considerable enthusiasm for using alternatives to public transport; just 20% say they aren't interested in this, although this figure doubles to more than 40% among Boomers.

The Black Lives Matter movement has made a strong impact on consumers

- Across the 18 countries surveyed, it's 44% who say the Black Lives Matter movement has made tackling racism a more important issue for them. A further quarter say it was already important to them.
- Figures can look very different at a country level, however, with the global numbers being influenced heavily by positive reactions in countries like China and India. In the U.S., where the movement first gathered pace earlier this year, it's about 1 in 5 who say it has become more important to them, with about a third saying it already mattered previously. Broadly comparable numbers are found in other countries which have seen widespread protests, including Australia and the UK.
- Generational differences are pronounced here. Whereas just 13% of Gen Z say it hasn't made it a more important issue for them, that climbs to 35% among Boomers.
- When asked what brands should be doing to support the Black Lives Matter movement, about 85% of consumers said they should be doing at least one of the eight initiatives asked about, with the strongest figures seen for supporting local / national community initiatives, showing support on social media, and ensuring diversity in leadership teams. In the U.S. specifically, however, it was reviewing hiring policies which attracted the most support.

Consumers express stronger support for sustainability

- It's 72% of consumers who think that it's now more important than before for brands to behave more sustainably. The figure peaks at almost 80% among Gen Z. Perhaps just as significantly, only 5% globally think it's now *less* important, and there's only 1 country among the 18 surveyed where this figure passes 10% (Romania).
- Between waves 4 and 5 (May to June), figures have held relatively stable in most markets. There have been more notable declines in places such as Japan (-17 points), Romania (-18 points) and the U.S. (-8 points) but it will be encouraging for campaigners that attitudes are holding steady in most places despite lockdowns being eased and some consumers hoping that they will soon get back to "normal".
- Consumers have similarly high expectations for their own behaviors. Some 71% think it's now more important for them to reduce their own carbon footprint / environmental impact; Gen Z is once again at the forefront, on almost 80%. Certainly, the numbers saying this is less important than before are a little higher compared to the question about corporate responsibility; four countries (France, Germany, Japan and Romania) now move above the 10% mark. Once again, however, we see numbers holding relatively steady compared to June, and it's significant that most consumers are willing to accept a level of personal responsibility which is broadly analogous to the expectations they are placing on companies.

Levels of Concern (Own Country)

% who say they're concerned about the coronavirus / COVID-19 situation in their country

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Not at all concerned	8	5	4	1	14	5	8	1	6	5	10	1	7	4	1	1	3	5	6
A little concerned	25	29	37	5	41	28	42	3	30	17	42	2	35	22	13	7	19	22	21
Quite concerned	21	31	29	12	26	31	27	7	34	29	26	11	29	35	32	13	32	27	20
Very concerned	23	21	21	42	15	21	18	30	20	26	14	27	19	26	27	30	32	31	26
Extremely concerned	24	15	9	40	4	15	6	59	10	23	8	59	10	14	26	49	15	16	27

% who say they're concerned about the coronavirus / COVID-19 situation in their country*

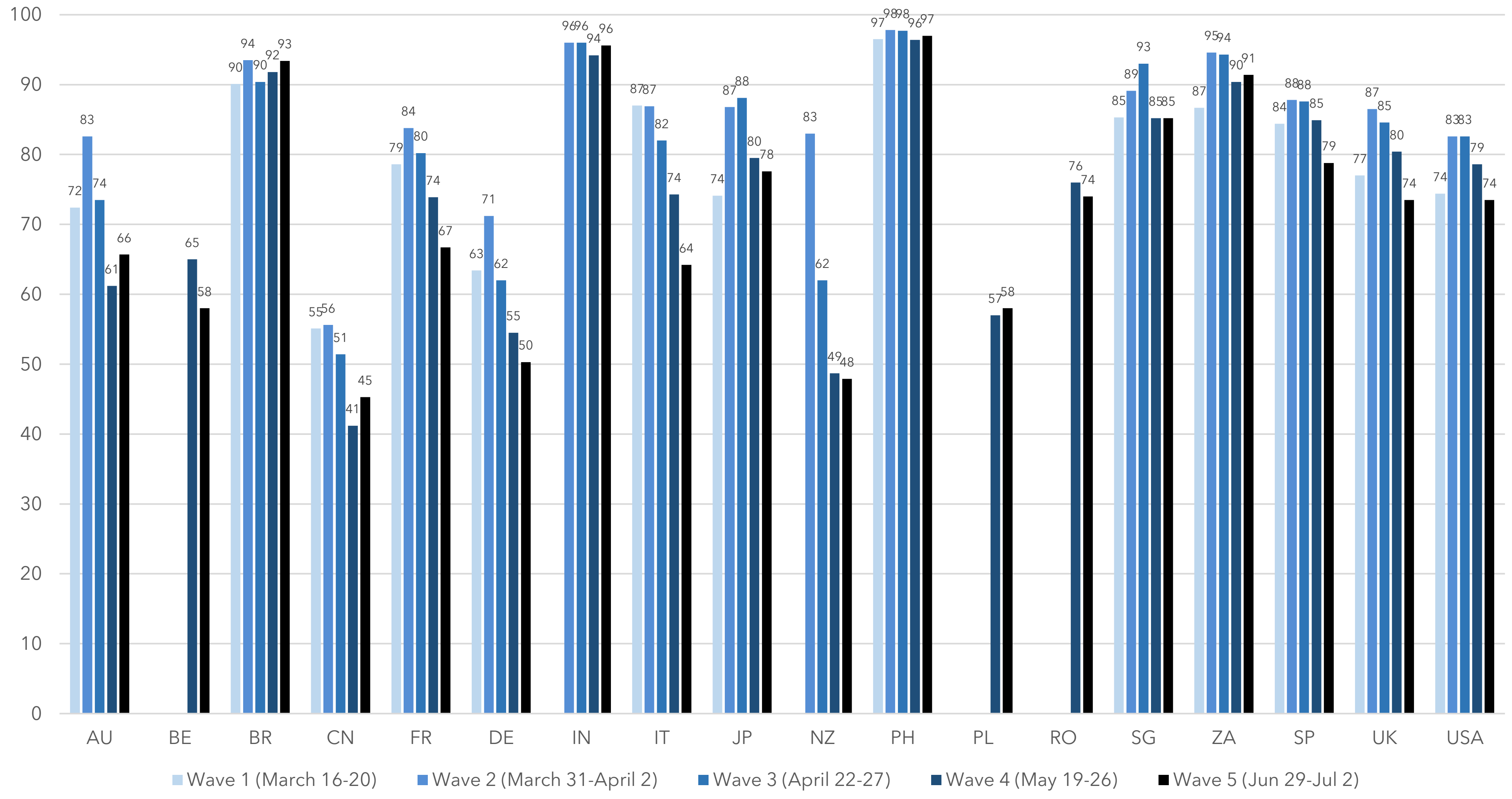
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Not at all concerned	4	8	9	7	7	8	6	9
A little concerned	25	25	26	23	26	24	23	28
Quite concerned	15	22	22	27	22	20	22	16
Very concerned	25	22	23	25	21	24	24	24
Extremely concerned	32	23	21	19	24	23	26	24

Question: How concerned are you about the coronavirus / COVID-19 situation in your country?

Levels of Concern (Own Country): Trended Data

% who say they're extremely, very, or quite concerned about the coronavirus / COVID-19 situation in their country



Question: How concerned are you about the coronavirus / COVID-19 situation in your country? Chart illustrates combined responses for Extremely concerned, Very concerned, Quite concerned

Levels of Concern (Global)

% who say they're concerned about the coronavirus / COVID-19 situation globally

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Not at all concerned	3	3	2	1	3	6	6	1	3	4	3	0	6	6	2	1	2	4	5
A little concerned	12	10	24	7	12	23	21	4	16	13	11	3	28	22	6	6	14	16	19
Quite concerned	22	31	35	18	25	33	34	10	34	20	28	10	32	41	27	11	30	29	27
Very concerned	34	28	25	39	38	25	26	31	30	31	33	28	22	19	32	34	35	32	28
Extremely concerned	30	28	14	35	22	14	13	55	17	33	26	59	12	13	33	48	19	20	21

% who say they're concerned about the coronavirus / COVID-19 situation globally*

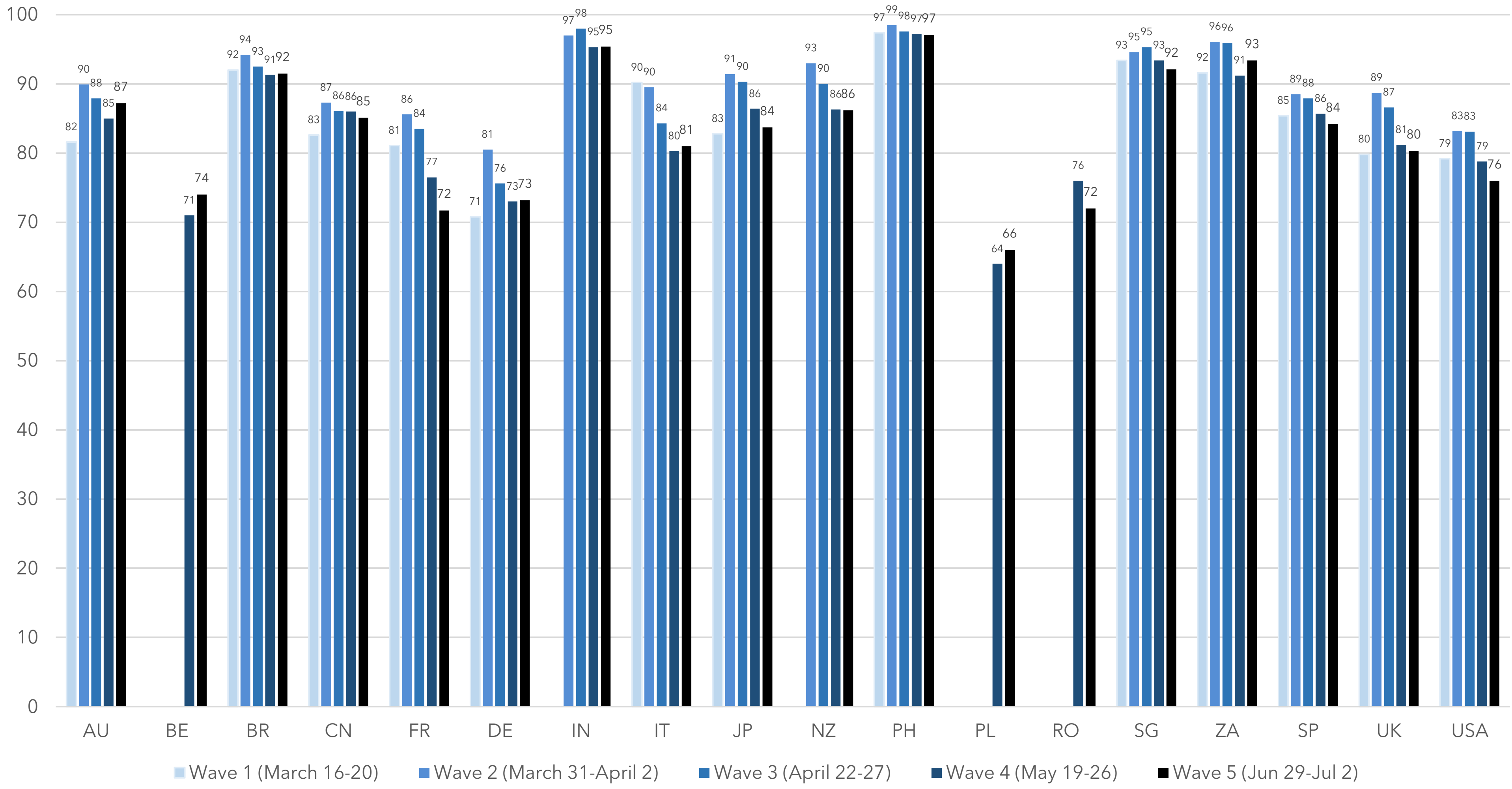
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Not at all concerned	1	3	3	3	2	3	2	5
A little concerned	11	11	13	14	13	11	12	15
Quite concerned	20	22	24	27	22	22	21	22
Very concerned	35	34	32	32	33	34	35	33
Extremely concerned	34	30	28	24	30	30	31	26

Question: How concerned are you about the coronavirus / COVID-19 situation globally?

Levels of Concern (Global): Trended Data

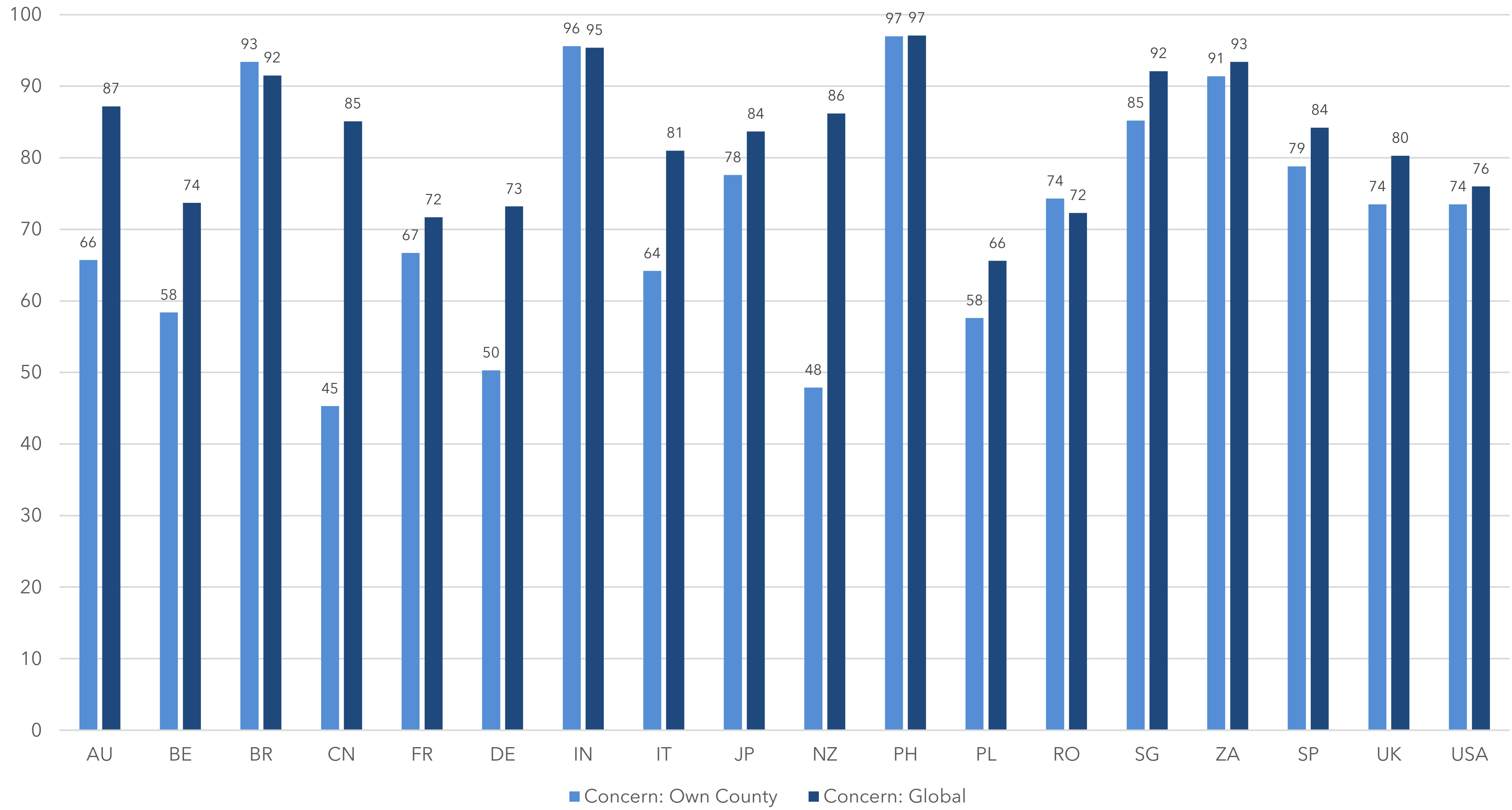
% who say they're extremely, very, or quite concerned about the coronavirus / COVID-19 situation globally



Question: How concerned are you about the coronavirus / COVID-19 situation globally? Chart illustrates combined responses for Extremely concerned, Very concerned, Quite concerned

Levels of Concern: Own Country vs Global

% who say they're extremely, very, or quite concerned about the coronavirus / COVID-19 situation in their own country vs globally



Question: How concerned are you about the coronavirus / COVID-19 situation in your country? How concerned are you about the coronavirus / COVID-19 situation globally? Chart illustrates combined responses for Extremely concerned, Very concerned, Quite concerned

Levels of Concern about a Second Wave

% who say they have the following levels of concern about a potential second wave in their country

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Not at all concerned	6	5	4	3	9	5	10	3	5	4	7	0	6	9	2	3	2	4	5
A little concerned	28	24	31	9	46	31	35	9	25	18	34	4	26	16	14	8	16	21	21
Quite concerned	23	31	32	16	26	29	30	16	36	24	28	12	31	33	34	16	31	28	21
Very concerned	22	23	20	31	16	21	18	31	23	26	18	24	21	27	24	29	31	24	24
Extremely concerned	22	18	14	42	4	14	8	42	12	29	13	61	16	15	27	44	21	23	30

% who say they have the following levels of concern about a potential second wave in their country*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Not at all concerned	4	6	7	6	5	7	5	6
A little concerned	24	28	29	26	28	28	25	32
Quite concerned	21	24	22	22	23	23	23	22
Very concerned	22	22	22	25	22	23	25	18
Extremely concerned	28	20	20	22	23	20	22	22

Question: How concerned are you about a potential "second wave" of coronavirus in your country?

Expected Length of Outbreak (Own Country)

% who say they think the following is how long the coronavirus / COVID-19 outbreak will last in their country

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
A few more days	1	0	1	1	1	3	1	0	3	0	3	1	1	1	1	1	1	1	2
1-2 weeks	3	1	2	2	5	3	3	3	3	0	2	0	2	3	1	0	1	1	2
3-4 weeks	4	2	2	2	6	3	3	2	6	1	5	1	2	3	2	0	3	2	2
2-3 months	18	10	11	15	28	9	8	16	11	3	14	4	10	9	6	2	7	8	9
4-5 months	10	7	9	14	11	9	6	15	8	2	7	8	7	7	7	6	5	7	4
6 months	20	18	17	23	25	15	17	22	16	9	16	11	13	12	18	8	13	14	12
Up to a year	23	32	30	25	14	26	31	25	31	22	27	38	28	27	39	29	28	34	33
Longer than a year	21	29	28	19	9	32	31	17	22	63	27	38	37	38	26	53	42	33	36

% who say they think the following is how long the coronavirus / COVID-19 outbreak will last in their country*

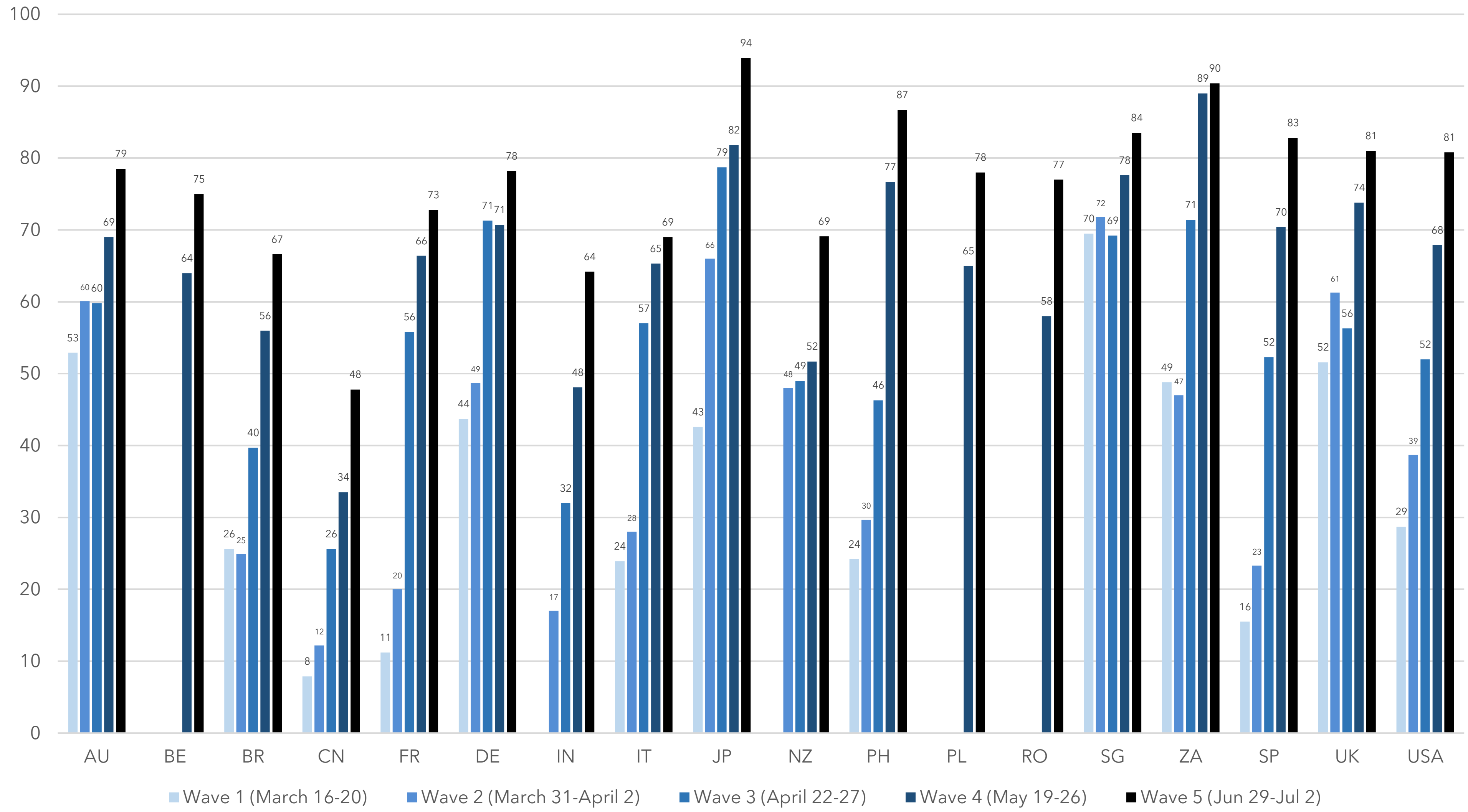
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
A few more days	1	1	2	0	1	1	1	2
1-2 weeks	3	4	3	1	4	3	3	4
3-4 weeks	3	4	4	2	4	4	4	2
2-3 months	19	20	16	10	18	18	18	14
4-5 months	15	10	8	7	9	11	10	13
6 months	21	21	19	15	18	21	21	22
Up to a year	21	22	23	30	23	22	24	21
Longer than a year	18	18	25	36	23	19	19	22

Question: How long do you think the coronavirus / COVID-19 outbreak will last in your country?

Expected Length of Outbreak (Own Country): Trended Data

% who say they think the coronavirus / COVID-19 outbreak will last 6 months or more in their country



Question: How long do you think the coronavirus / COVID-19 outbreak will last in your country? Chart illustrates combined responses for 6 months, Up to a year, Longer than a year

Expected Length of Outbreak (Global)

% who say they think the following is how long the coronavirus / COVID-19 outbreak will last globally

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
A few more days	1	1	0	1	0	2	1	1	1	0	1	0	1	1	1	1	0	0	2
1-2 weeks	1	1	4	2	1	3	3	1	2	0	1	0	1	1	1	1	1	1	1
3-4 weeks	1	1	2	2	1	2	2	2	3	0	1	1	1	2	1	0	1	1	1
2-3 months	4	2	1	9	3	4	1	5	4	1	0	1	3	4	1	1	3	2	4
4-5 months	6	2	6	9	7	4	4	9	5	1	1	3	5	5	3	2	4	3	6
6 months	15	6	9	19	18	11	8	18	11	3	5	8	8	9	9	6	8	8	11
Up to a year	28	25	25	31	31	26	23	28	26	13	18	30	21	26	28	23	20	27	26
Longer than a year	44	64	54	28	39	49	57	37	48	82	73	56	61	52	56	67	63	58	50

% who say they think the following is how long the coronavirus / COVID-19 outbreak will last globally*

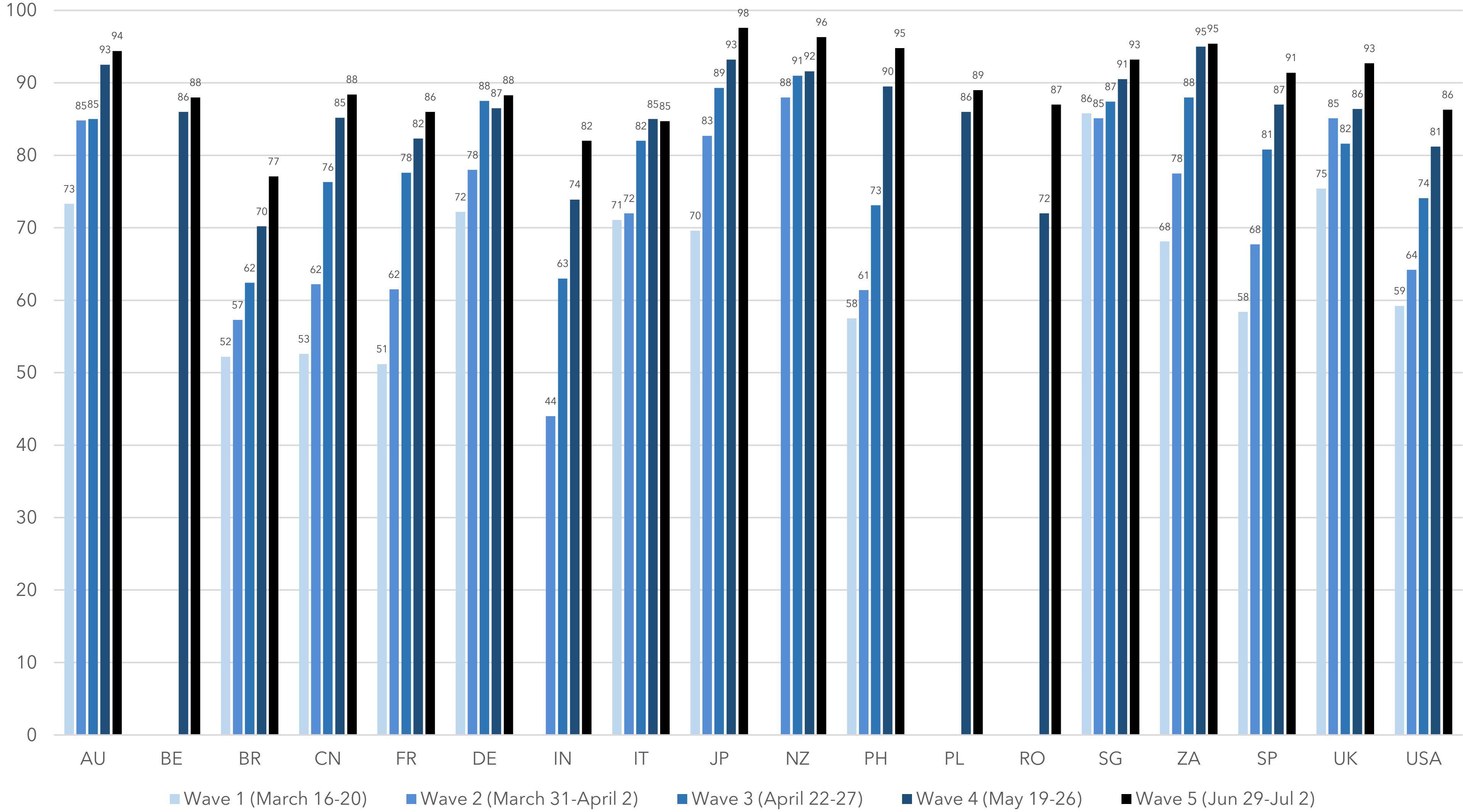
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
A few more days	1	1	1	0	1	1	1	1
1-2 weeks	1	1	1	0	1	1	1	1
3-4 weeks	2	2	1	1	2	1	2	3
2-3 months	4	4	3	2	3	4	5	2
4-5 months	8	7	5	5	6	7	6	7
6 months	16	16	14	9	14	15	16	16
Up to a year	28	28	27	25	26	29	28	26
Longer than a year	40	42	48	59	47	43	42	44

Question: How long do you think the coronavirus / COVID-19 outbreak will last globally?

Expected Length of Outbreak (Global): Trended Data

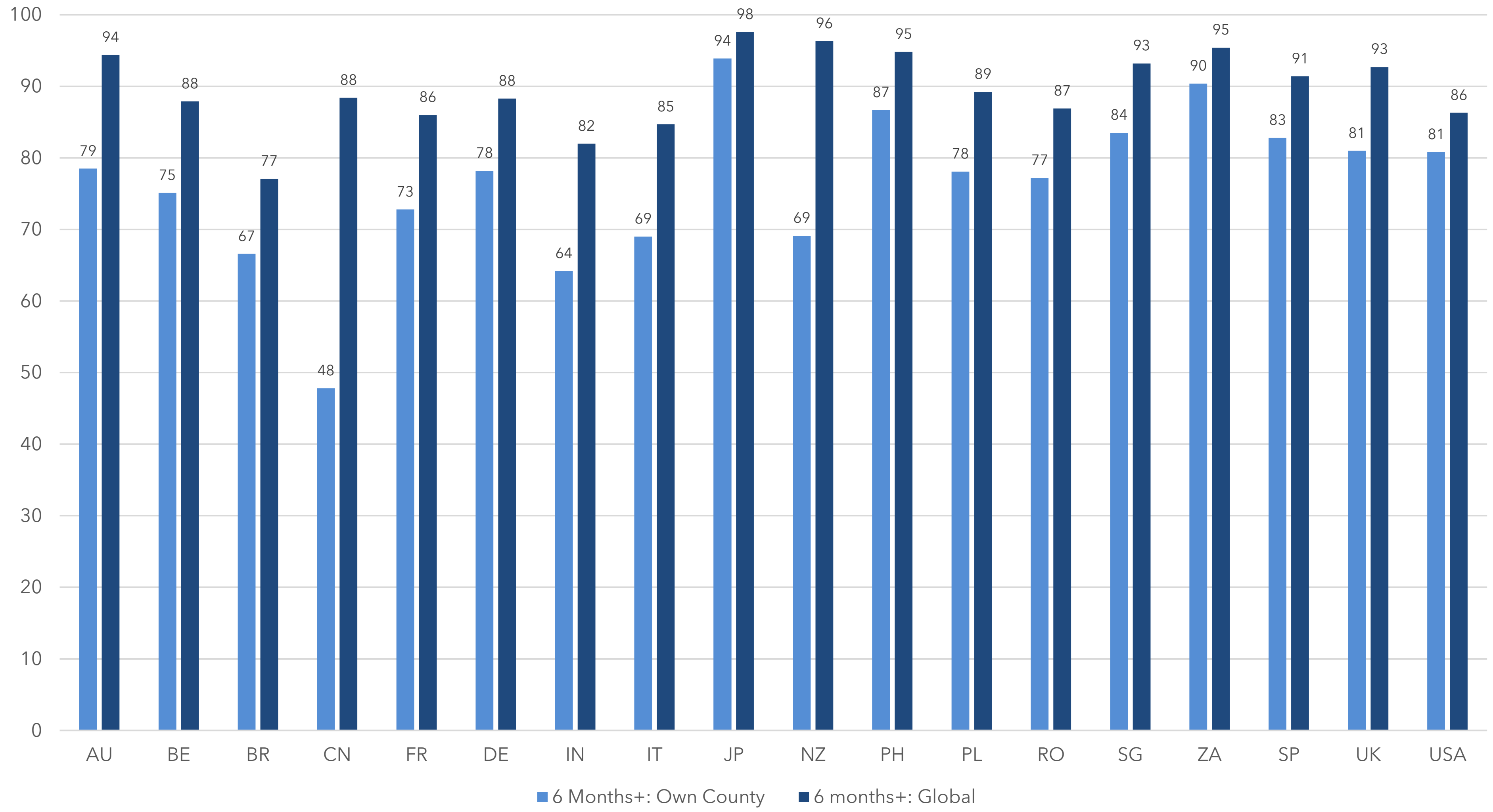
% who say they think the coronavirus / COVID-19 outbreak will last 6 months or more globally



Question: How long do you think the coronavirus / COVID-19 outbreak will last globally? Chart illustrates combined responses for 6 months, Up to a year, Longer than a year

Expected Length of Outbreak: Own Country vs Globally

% who say they think the coronavirus / COVID-19 outbreak will last 6 months or more in their <u>own country</u> vs <u>globally</u>



Question: How long do you think the coronavirus / COVID-19 outbreak will last in your country? How long do you think the coronavirus / COVID-19 outbreak will last globally? Chart illustrates combined responses for 6 months, Up to a year, Longer than a year

Levels of Optimism (Own Country)

% who say they feel optimistic / not optimistic that their country will overcome the coronavirus / COVID-19 outbreak

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1 - Not optimistic at all	6	4	6	21	1	9	3	3	4	32	2	8	4	11	3	9	8	7	10
2	8	6	10	25	1	15	7	6	12	28	5	13	9	12	8	12	22	16	14
3	21	35	48	29	7	44	36	20	38	29	20	29	32	40	35	37	43	37	35
4	28	37	30	16	29	25	42	34	34	8	37	23	28	23	39	21	21	29	25
5 - Very optimistic	37	18	6	9	61	8	13	37	12	3	36	28	28	14	15	22	6	12	16

% who say they feel optimistic / not optimistic that their country* will overcome the coronavirus / COVID-19 outbreak

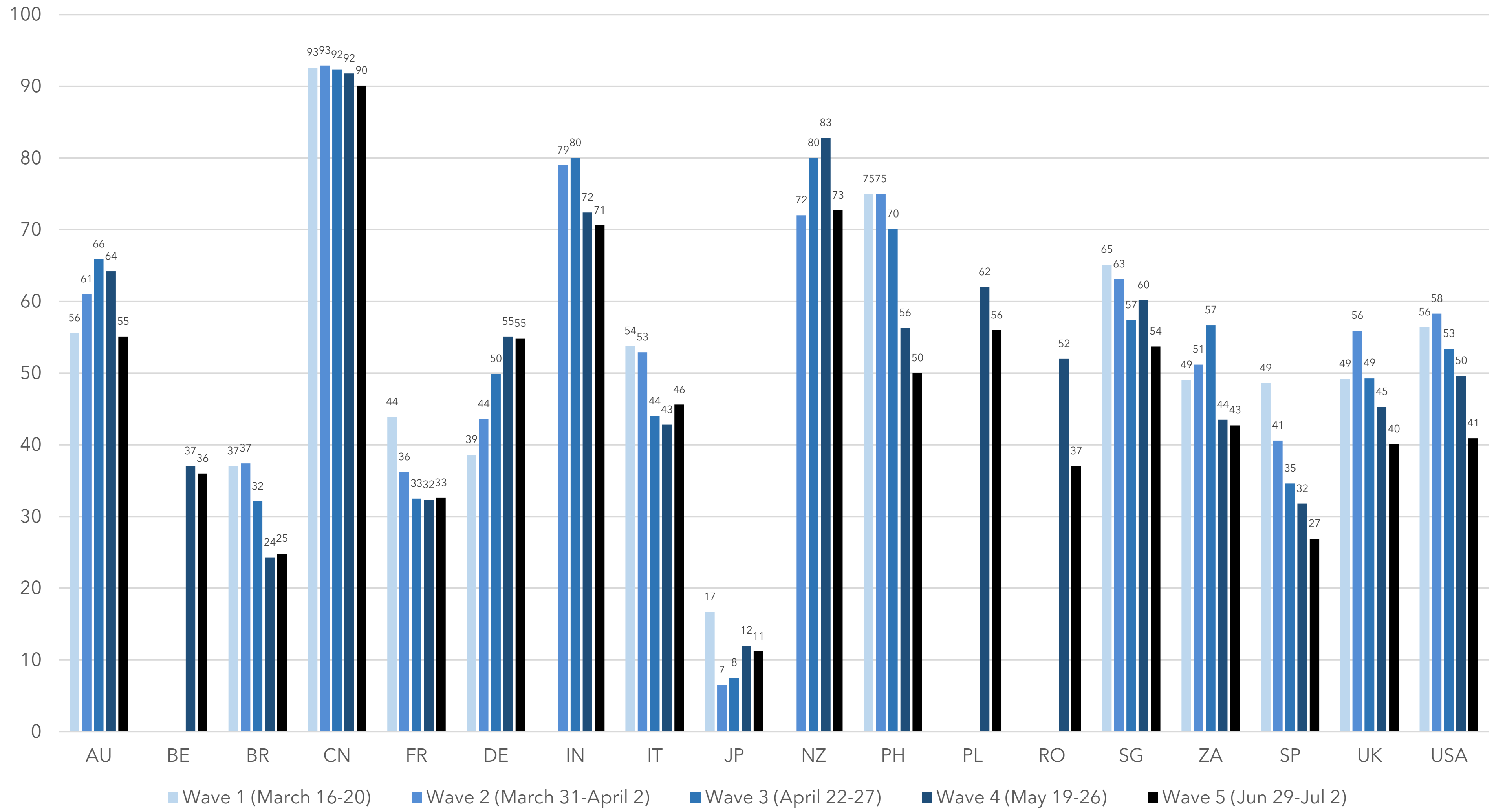
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
1 - Not optimistic at all	6	5	8	9	7	6	7	7
2	8	8	9	12	9	8	8	9
3	22	19	22	29	22	20	20	23
4	32	26	27	28	28	27	27	27
5 - Very optimistic	31	42	35	22	34	40	38	34

Question: How optimistic are you that your country will overcome the coronavirus / COVID-19 outbreak?

Levels of Optimism (Own Country): Trended Data

% who say they feel optimistic that their country will overcome the coronavirus / COVID-19 outbreak



Question: How optimistic are you that your country will overcome the coronavirus / COVID-19 outbreak? Chart illustrates combined responses for scale points 4 and 5 on the scale of "1 – not optimistic at all" to "5 – very optimistic"

Levels of Optimism (Global)

% who say they feel optimistic / not optimistic that the world will overcome the coronavirus / COVID-19 outbreak

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1 - Not optimistic at all	10	12	11	6	13	14	9	3	6	43	17	3	4	9	10	5	15	9	6
2	16	25	22	22	20	25	29	5	20	28	22	2	9	11	18	9	28	15	12
3	35	39	46	36	39	44	47	20	43	22	39	28	30	38	44	32	39	43	40
4	24	16	19	26	20	12	13	37	23	5	15	35	27	24	20	29	14	24	28
5 - Very optimistic	15	8	3	11	8	5	3	36	8	3	7	33	29	18	9	25	4	10	15

% who say they feel optimistic / not optimistic that the world* will overcome the coronavirus / COVID-19 outbreak

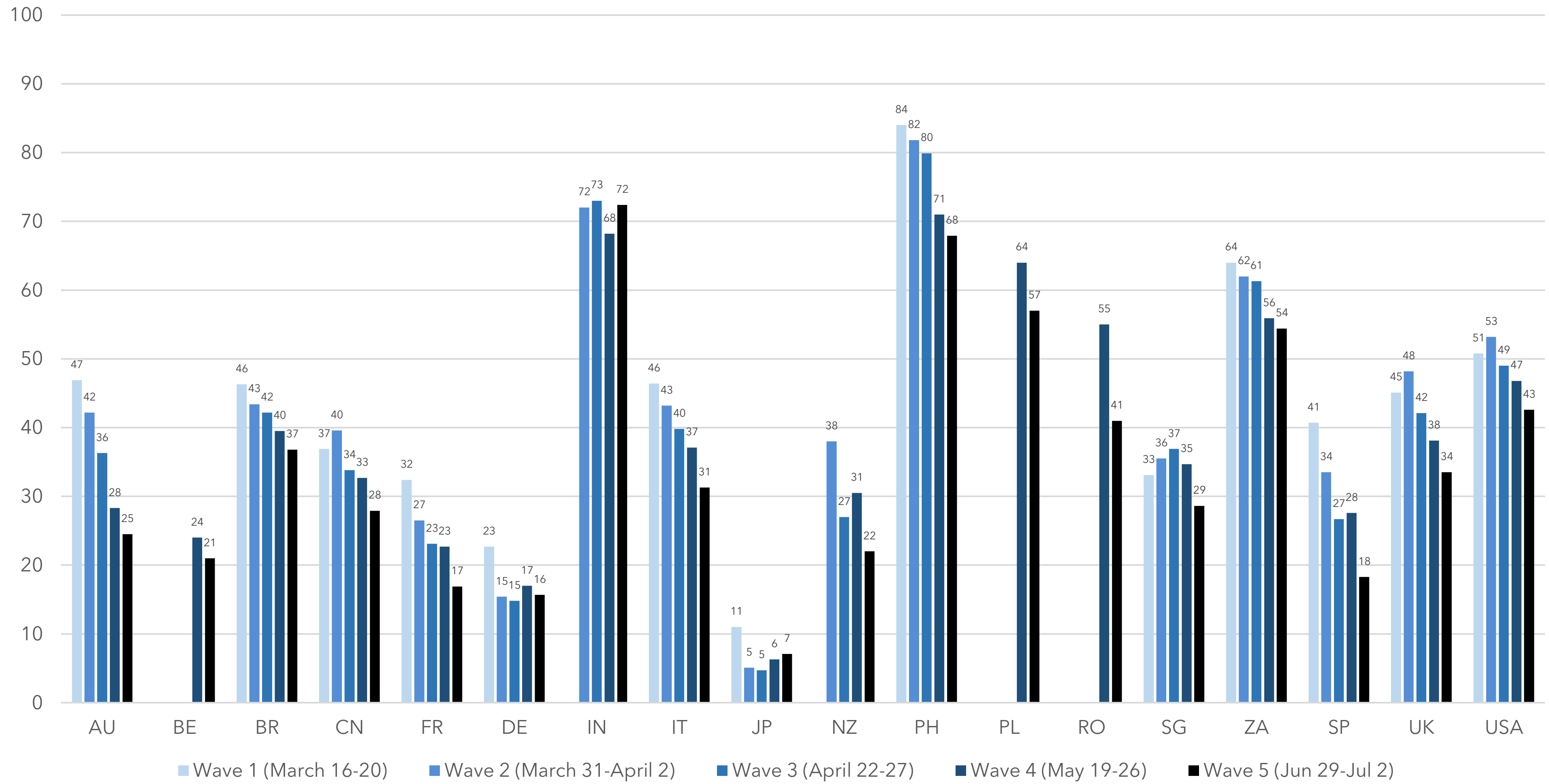
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
1 - Not optimistic at all	6	9	13	14	10	10	8	10
2	13	16	18	19	18	15	16	17
3	33	36	34	40	36	34	34	32
4	30	24	20	18	23	25	27	24
5 - Very optimistic	18	15	15	10	13	17	15	17

Question: How optimistic are you that the world will overcome the coronavirus / COVID-19 outbreak?

Levels of Optimism (Global): Trended Data

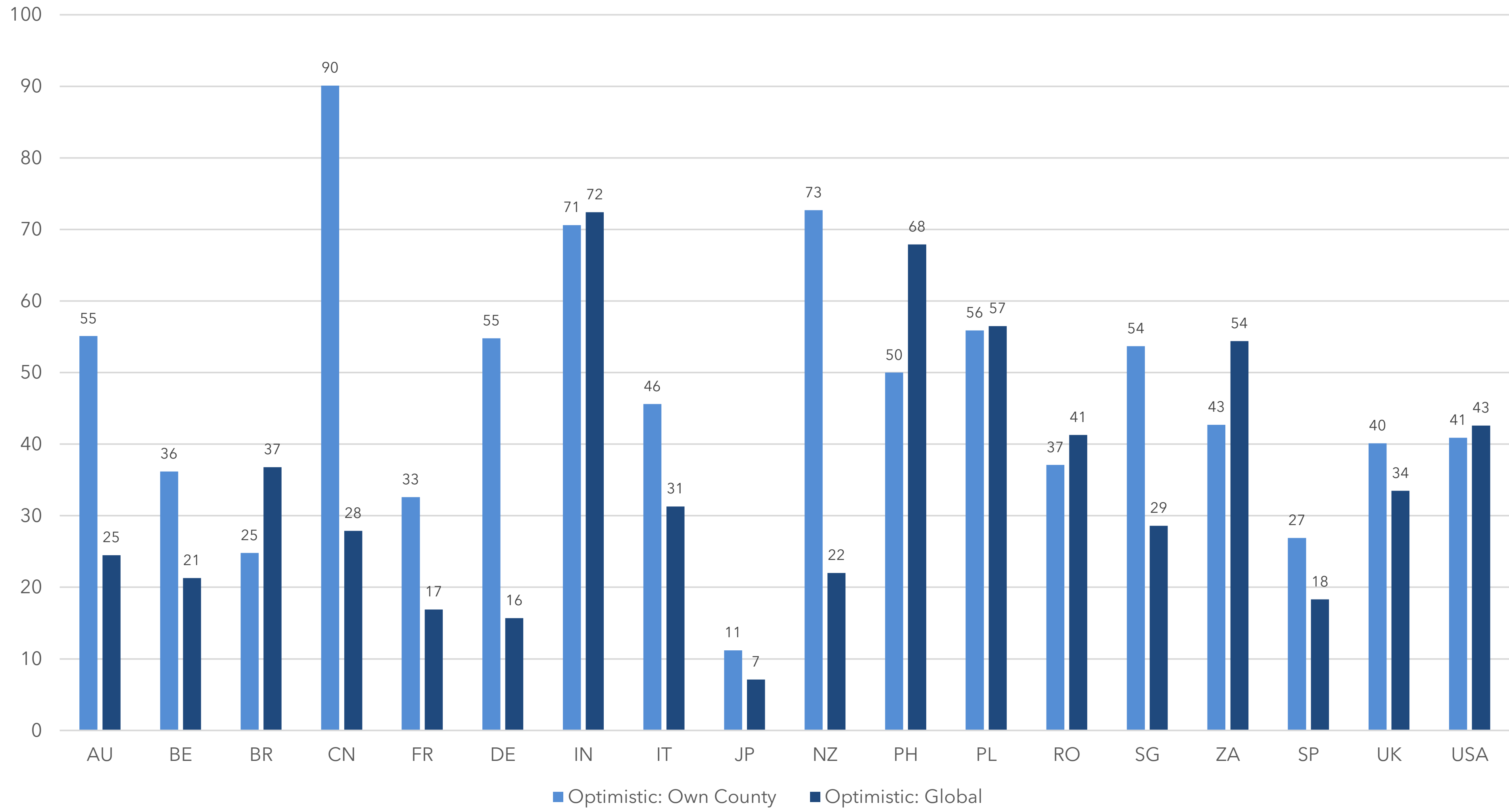
% who say they feel optimistic that the world will overcome the coronavirus / COVID-19 outbreak



Question: How optimistic are you that the world will overcome the coronavirus / COVID-19 outbreak? Chart illustrates combined responses for scale points 4 and 5 on the scale of "1 – not optimistic at all" to "5 – very optimistic"

Levels of Optimism: Own Country vs Global

% who say they feel optimistic that their own country or the world will overcome the coronavirus / COVID-19 outbreak



Question: How optimistic are you that your country will overcome the coronavirus / COVID-19 outbreak? How optimistic are you that the world will overcome the coronavirus / COVID-19 outbreak? Chart illustrates combined responses for scale points 4 and 5 on the scale of “1 – not optimistic at all” to “5 – very optimistic”

Impact on Personal / Household Finances

% who say they expect coronavirus / COVID-19 to have the following effect on their personal / household finances

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
No impact	14	23	27	9	14	27	34	4	13	12	22	2	14	9	8	4	10	28	27
Small impact	45	44	40	36	61	41	39	28	41	39	46	10	38	35	42	25	34	40	41
Big impact	28	20	22	32	18	20	12	54	29	27	20	54	26	39	34	46	33	16	18
Dramatic impact	9	8	5	17	6	5	7	11	9	6	7	32	13	10	12	18	7	7	6
Not sure	4	6	6	6	1	7	8	3	8	17	6	2	9	7	5	7	17	8	8

% who say they expect coronavirus / COVID-19 to have the following effect on their personal / household finances*

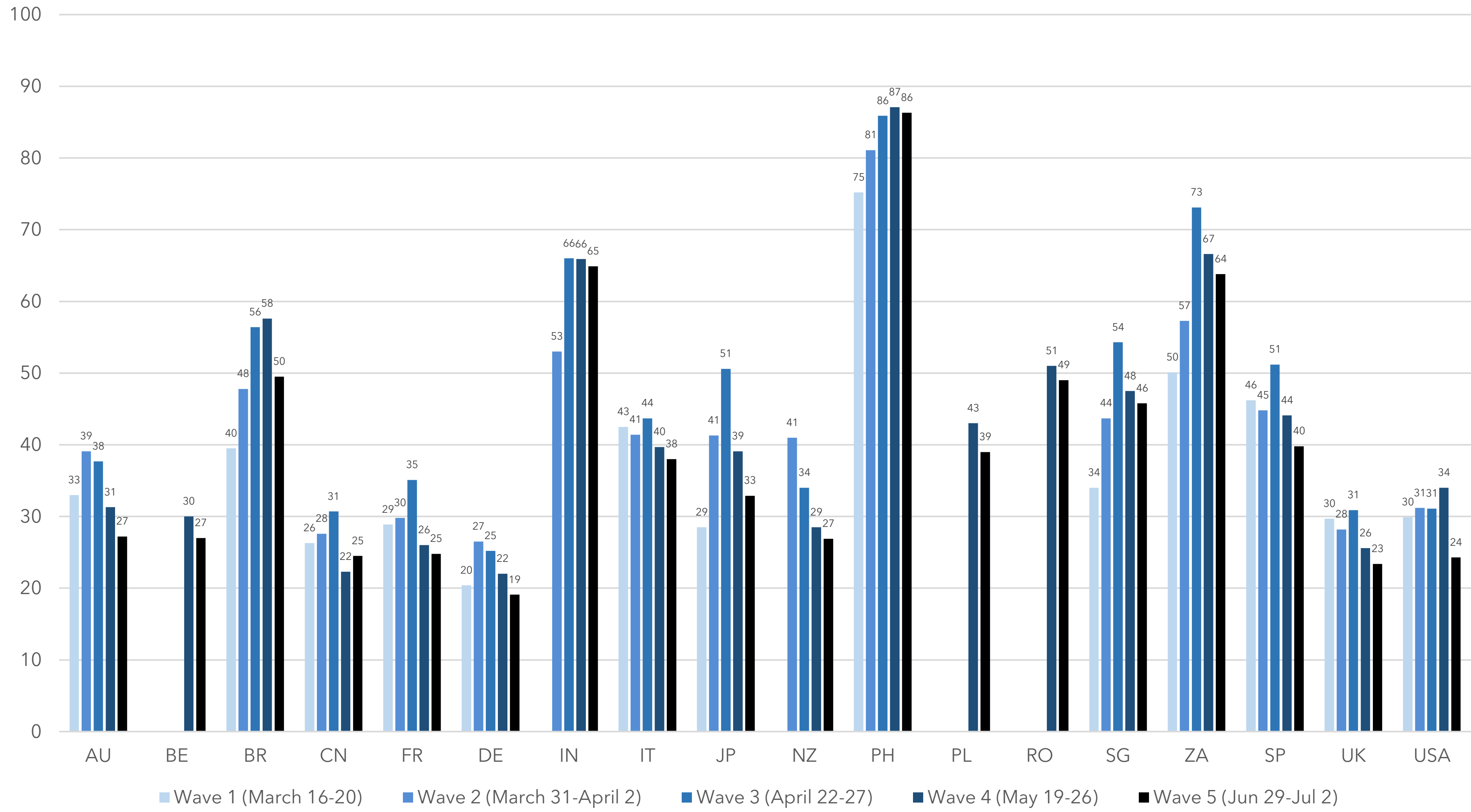
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
No impact	9	13	18	22	14	14	16	12
Small impact	38	49	43	44	43	46	47	43
Big impact	38	27	25	20	28	28	27	28
Dramatic impact	11	9	9	6	10	8	8	12
Not sure	4	3	5	8	5	4	3	6

Question: How do you expect the coronavirus / COVID-19 outbreak to impact the following? Your personal / household finances

Impact on Personal / Household Finances: Trended Data

% who say they expect coronavirus / COVID-19 to have a big or dramatic effect on their personal / household finances



Question: How do you expect the coronavirus / COVID-19 outbreak to impact the following? Your personal / household finances. Chart illustrates combined responses for Dramatic Impact, Big Impact

Impact on Country's Economy

% who say they expect coronavirus / COVID-19 to have the following effect on their country's economy

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
No impact	2	1	1	1	2	3	4	0	1	1	0	0	1	2	0	1	0	1	2
Small impact	18	7	10	6	34	10	18	7	6	7	11	2	12	8	7	4	4	8	11
Big impact	53	53	64	47	47	55	49	68	57	64	61	39	44	54	61	48	55	49	53
Dramatic impact	25	36	20	44	15	29	20	23	34	22	24	59	39	33	29	48	37	39	30
Not sure	3	3	5	2	2	4	10	2	3	7	4	1	3	4	3	0	3	4	4

% who say they expect coronavirus / COVID-19 to have the following effect on their country's economy*

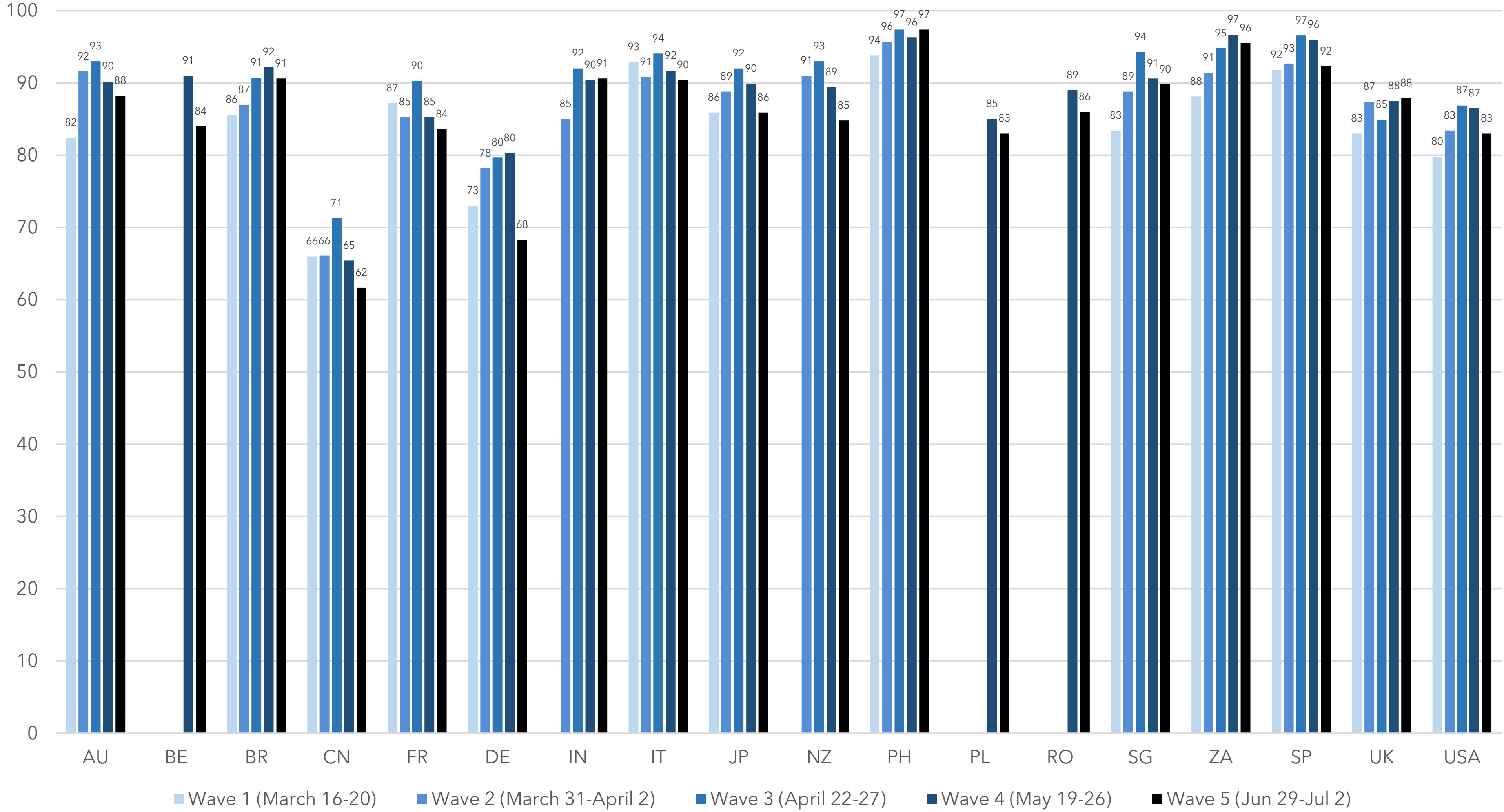
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
No impact	0	2	2	0	2	1	2	2
Small impact	21	19	18	11	19	18	19	16
Big impact	50	53	52	55	49	56	53	51
Dramatic impact	25	24	25	29	26	23	25	25
Not sure	5	2	3	5	4	3	2	7

Question: How do you expect the coronavirus / COVID-19 outbreak to impact the following? Your country's economy

Impact on Country's Economy: Trended Data

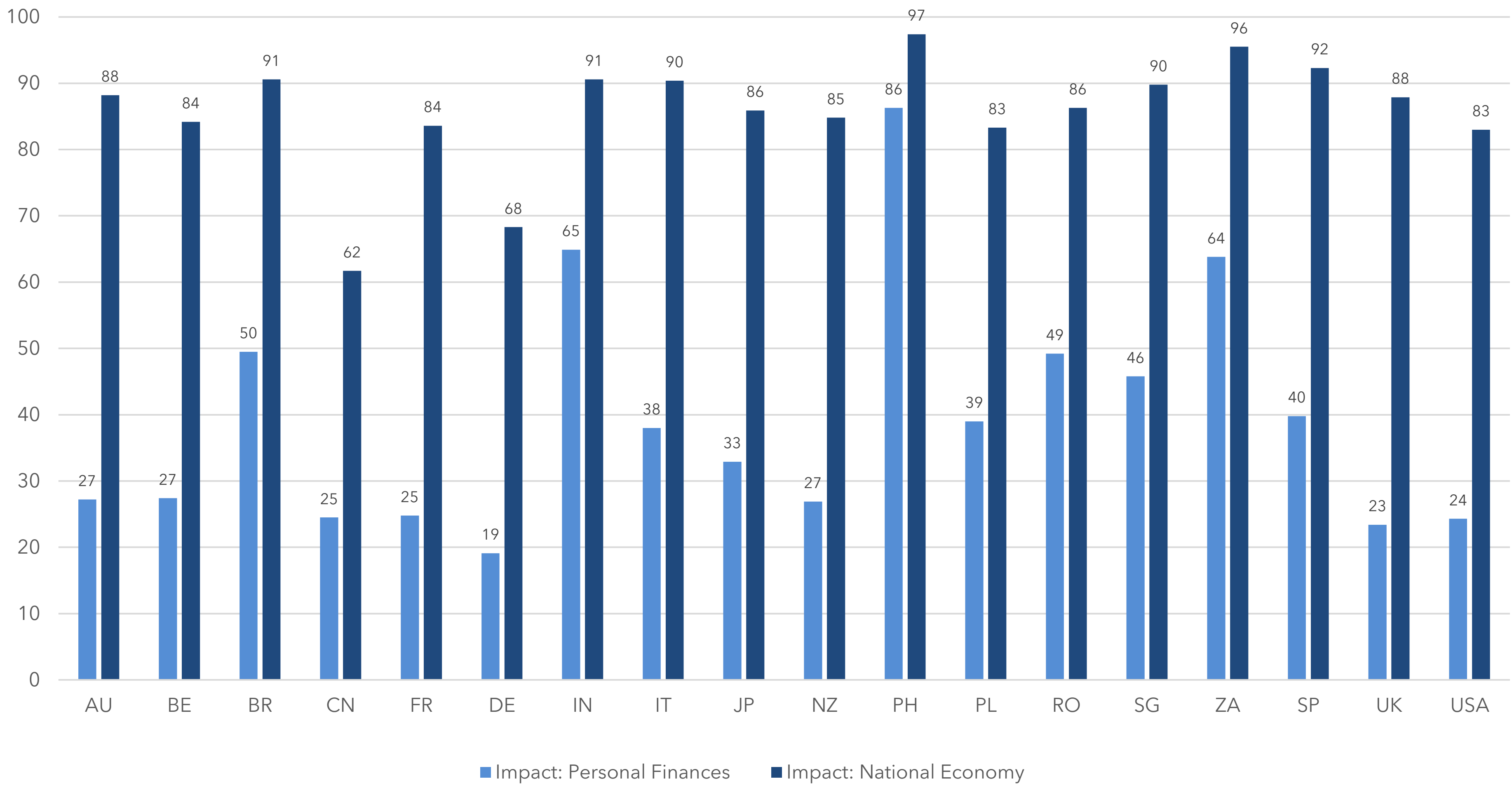
% who say they expect coronavirus / COVID-19 to have a dramatic or big effect on their country's economy



Question: How do you expect the coronavirus / COVID-19 outbreak to impact the following? Your country's economy. Chart illustrates combined responses for Dramatic Impact, Big Impact

Impact on Personal Finances vs Country's Economy

% who say they expect coronavirus / COVID-19 to have a dramatic or big effect on their personal finances vs the country's economy



Question: How do you expect the coronavirus / COVID-19 outbreak to impact the following? Your country's economy / your personal finances. Chart illustrates combined responses for Dramatic Impact, Big Impact

Impact on Global Economy

% who say they expect coronavirus / COVID-19 to have the following effect on the global economy

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
No impact	1	1	1	1	2	3	2	1	1	1	1	0	1	2	1	0	0	2	2
Small impact	7	5	7	7	7	8	10	7	6	3	5	2	7	8	4	4	4	6	11
Big impact	46	36	57	51	35	49	42	65	57	54	34	37	42	56	41	57	58	45	52
Dramatic impact	42	54	33	39	54	35	37	26	32	37	58	60	47	27	53	36	34	43	29
Not sure	4	4	2	2	3	6	9	3	4	6	3	2	3	7	2	4	3	5	7

% who say they expect coronavirus / COVID-19 to have the following effect on the global economy*

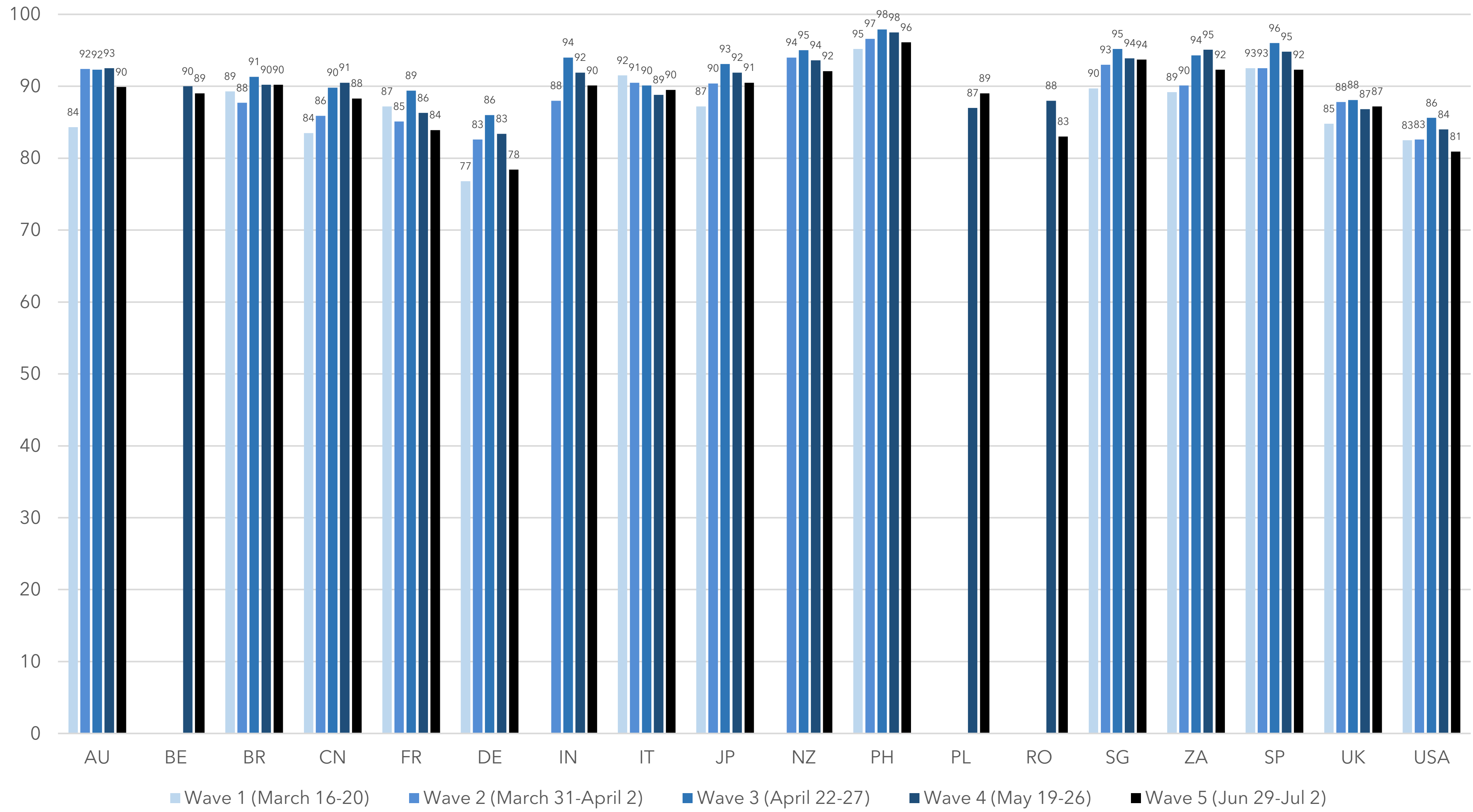
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
No impact	1	2	1	0	1	2	1	3
Small impact	9	8	5	5	8	7	7	9
Big impact	50	45	46	51	43	49	47	45
Dramatic impact	36	43	43	38	44	39	43	37
Not sure	5	3	4	5	4	4	2	6

Question: How do you expect the coronavirus / COVID-19 outbreak to impact the following? The global economy

Impact on Global Economy: Trended Data

% who say they expect coronavirus / COVID-19 to have a dramatic or big effect on the global economy



Question: How do you expect the coronavirus / COVID-19 outbreak to impact the following? The global economy. Chart illustrates combined responses for Dramatic Impact, Big Impact

Personal Financial Response

% who say they will do these things because of the coronavirus outbreak

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Cut back on the day-to-day things you buy	35	41	31	50	26	40	21	40	43	38	46	55	44	36	51	58	32	38	38
Delay big purchases (e.g. car, vacations, home appliances, etc)	80	67	56	84	85	61	61	96	75	34	68	92	74	84	86	89	78	70	66
Look for cheaper versions of products from alternative brands	29	32	23	43	21	18	22	44	25	16	37	55	34	36	47	56	28	27	24
Look for flexible payment options (e.g. pay in instalments, etc)	20	14	6	31	17	8	8	39	8	4	16	43	9	21	14	24	10	8	7
Make fewer but more expensive purchases	19	11	13	12	26	7	11	20	9	8	9	14	22	15	13	17	8	13	12
Put more purchases on credit cards	17	10	7	26	18	2	5	20	5	20	9	10	27	19	14	11	10	8	11
Reduce regular financial commitments (e.g. cancel subscriptions, memberships, etc)	34	21	12	32	43	12	15	40	26	7	21	43	14	19	30	42	19	19	19
Take out a loan	6	1	2	6	5	5	3	11	3	1	5	18	5	7	6	9	4	3	3
Use your savings	35	28	18	26	34	20	14	61	26	16	23	54	24	28	38	42	29	23	18
Wait for products to be on promotion, discount, sale, etc	38	41	31	45	35	32	26	48	43	20	40	42	35	42	53	54	35	31	35
None of these	9	18	25	5	7	22	27	0	9	30	15	1	9	9	3	4	11	14	17

Question: Will you do any of these things because of the coronavirus outbreak?

Personal Financial Response

% who say they will do these things because of the coronavirus outbreak*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Cut back on the day-to-day things you buy	38	32	37	37	36	34	31	38
Delay big purchases (e.g. car, vacations, home appliances, etc)	86	84	75	64	79	82	87	75
Look for cheaper versions of products from alternative brands	38	30	25	21	29	29	26	32
Look for flexible payment options (e.g. pay in instalments, etc)	29	22	14	9	17	22	22	19
Make fewer but more expensive purchases	17	23	16	11	19	19	23	18
Put more purchases on credit cards	13	20	15	10	15	18	20	16
Reduce regular financial commitments (e.g. cancel subscriptions, memberships, etc)	35	38	30	19	33	34	33	35
Take out a loan	7	6	5	2	5	7	6	5
Use your savings	52	35	27	19	30	38	33	36
Wait for products to be on promotion, discount, sale, etc	42	38	36	32	39	36	37	36
None of these	4	7	12	21	8	9	7	10

Question: Will you do any of these things because of the coronavirus outbreak?

Impact on Job

% who say the following things have happened to them during the coronavirus outbreak

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Been temporarily laid off / placed on furlough	12	7	16	6	11	15	17	17	15	3	6	15	14	12	9	14	14	18	11
Had a bonus / payrise deferred	14	6	4	6	20	5	7	19	8	7	9	10	18	14	17	11	3	7	6
Had a paycut	27	11	10	21	34	18	10	38	9	10	15	23	20	21	21	26	13	8	8
Had your working hours reduced	24	24	16	33	19	14	11	41	19	20	21	34	25	15	24	36	18	13	14
Lost your job	7	6	6	10	3	5	5	13	5	2	7	24	6	6	7	11	7	4	5
None of these / Prefer not to say	43	59	59	42	41	59	64	19	55	66	59	25	46	47	43	32	52	62	66

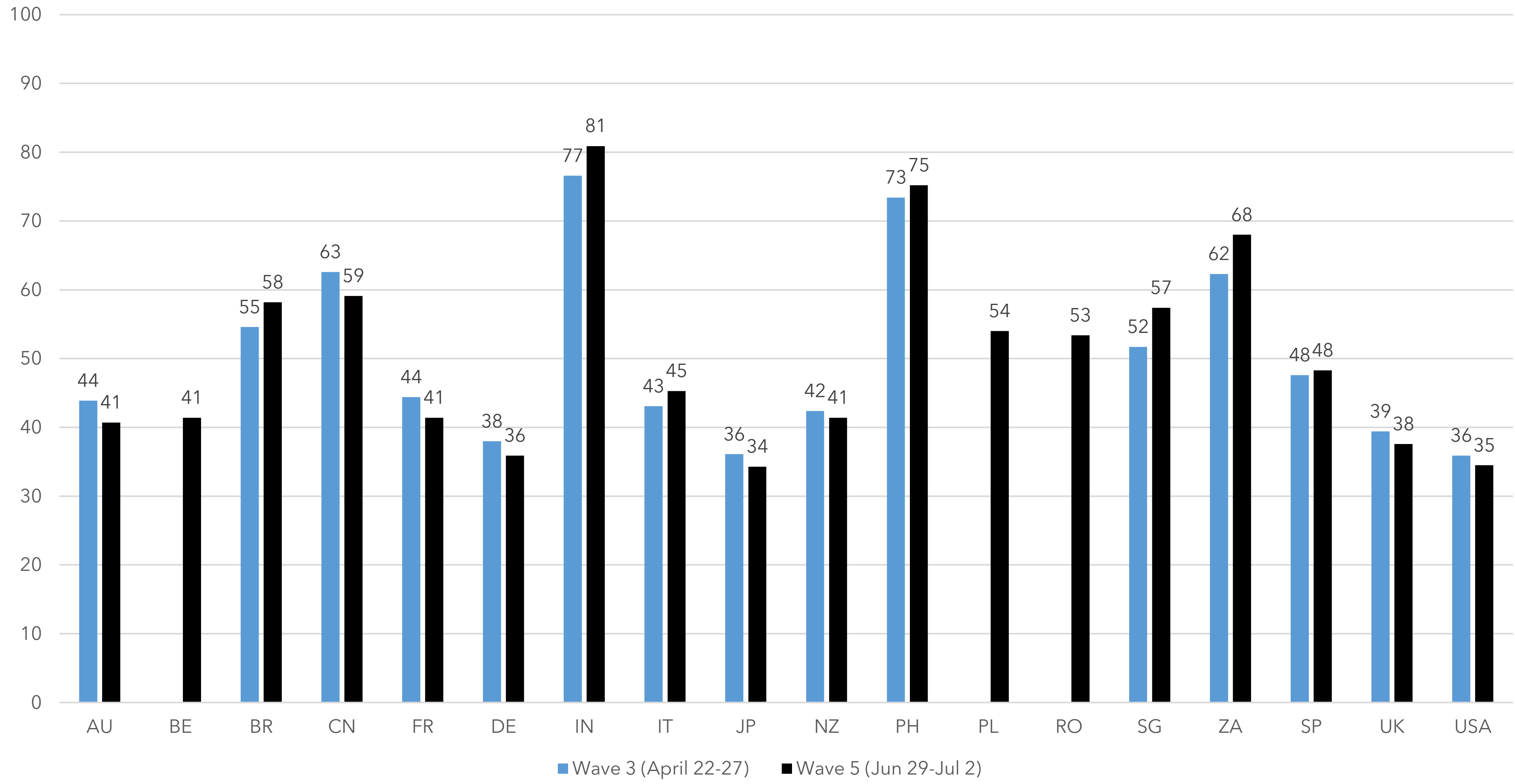
% who say the following things have happened to them during the coronavirus outbreak (using all country data)

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Been temporarily laid off / placed on furlough	16	12	10	8	11	13	8	14
Had a bonus / payrise deferred	7	20	12	4	11	17	17	10
Had a paycut	27	31	23	10	22	30	27	21
Had your working hours reduced	26	26	21	13	22	25	27	22
Lost your job	11	7	5	3	6	7	5	11
None of these / Prefer not to say	38	37	49	70	47	39	42	46

Question: Have any of the following things happened to you during the coronavirus outbreak?

Impact on Job – Trended Data

% who say that the coronavirus outbreak has had some level of impact on their job



Question: Have any of the following things happened to you during the coronavirus outbreak? Chart shows combined total for respondents who said they had been temporarily laid off, had a bonus / payrise deferred, had a paycut, had their working hours reduced, or have lost their job.

Delayed Purchases

% who say they've delayed purchasing the following as a result of the coronavirus / COVID-19 outbreak

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Car / vehicle	23	18	9	24	25	16	16	32	20	6	14	26	15	22	13	29	19	16	16
Clothes	27	21	30	34	19	25	14	46	31	12	21	52	21	32	26	46	32	25	19
Flights	30	34	17	35	31	18	24	33	23	10	32	51	21	36	43	31	33	35	28
Home appliances / devices (e.g. TV, white goods)	22	15	10	24	21	11	10	36	18	10	14	38	19	26	22	31	18	14	12
Home furnishings (e.g. bed, sofa, etc)	21	15	7	26	21	9	11	30	18	4	10	36	15	28	21	34	17	12	12
Insurance	7	5	3	6	7	4	3	15	7	1	6	12	4	7	12	12	4	4	2
Luxury items (e.g. designer clothes, shoes, fragrances, etc)	26	17	12	19	35	7	11	35	11	5	12	39	17	28	23	37	12	10	9
Personal electronics (e.g. laptop, tablet, PC, etc)	24	15	10	24	24	13	8	41	18	4	12	46	18	26	23	33	18	11	13
Smart devices (e.g. smart-watches, fitness trackers, etc)	16	9	6	10	17	6	6	29	7	2	6	28	8	20	16	18	10	5	5
Smartphone	24	14	8	26	23	13	11	42	16	5	10	38	17	30	24	31	18	11	11
Vacations / trips	50	45	35	45	56	37	40	48	49	19	47	63	50	56	60	51	55	49	44
None of these	18	32	37	14	14	35	38	2	22	61	29	6	23	14	12	9	18	25	32

Question: Have you delayed purchasing any of the following, as a result of the coronavirus / COVID-19 outbreak?

Delayed Purchases

% who say they've delayed purchasing the following as a result of the coronavirus / COVID-19 outbreak*

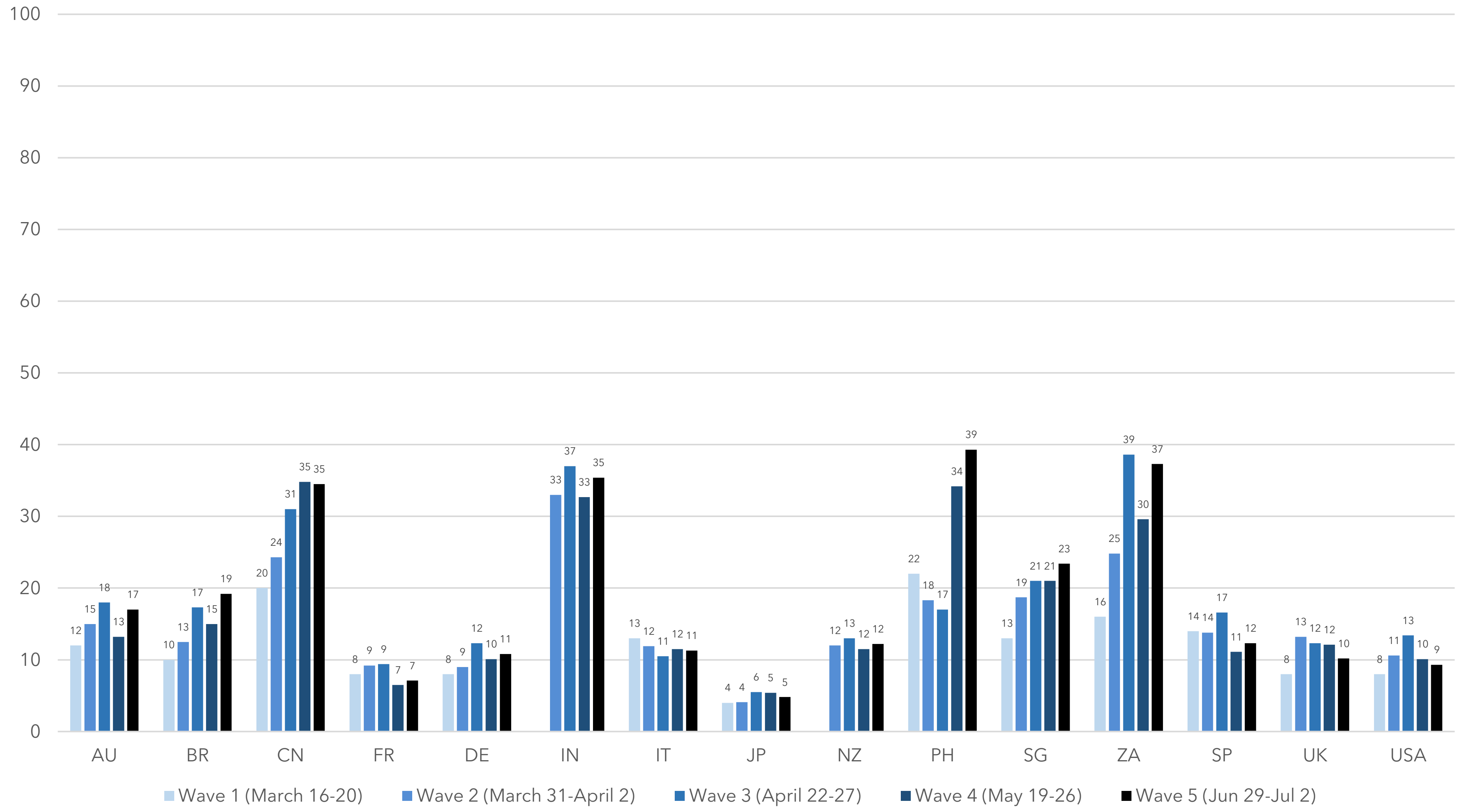
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Car / vehicle	20	25	23	14	19	26	30	19
Clothes	39	25	23	21	29	25	24	30
Flights	24	32	30	30	28	32	41	19
Home appliances / devices (e.g. TV, white goods)	22	24	21	14	20	24	25	23
Home furnishings (e.g. bed, sofa, etc)	19	22	21	15	19	22	25	20
Insurance	8	9	6	4	7	8	8	7
Luxury items (e.g. designer clothes, shoes, fragrances, etc)	25	30	24	12	25	28	33	22
Personal electronics (e.g. laptop, tablet, PC, etc)	35	25	19	12	21	27	23	27
Smart devices (e.g. smart-watches, fitness trackers, etc)	21	18	12	5	14	17	14	17
Smartphone	34	25	18	11	20	26	23	26
Vacations / trips	43	51	51	49	49	50	58	37
None of these	11	15	23	34	19	17	12	22

Question: Have you delayed purchasing any of the following, as a result of the coronavirus / COVID-19 outbreak?

Delay to Luxury Purchases: Trended Data

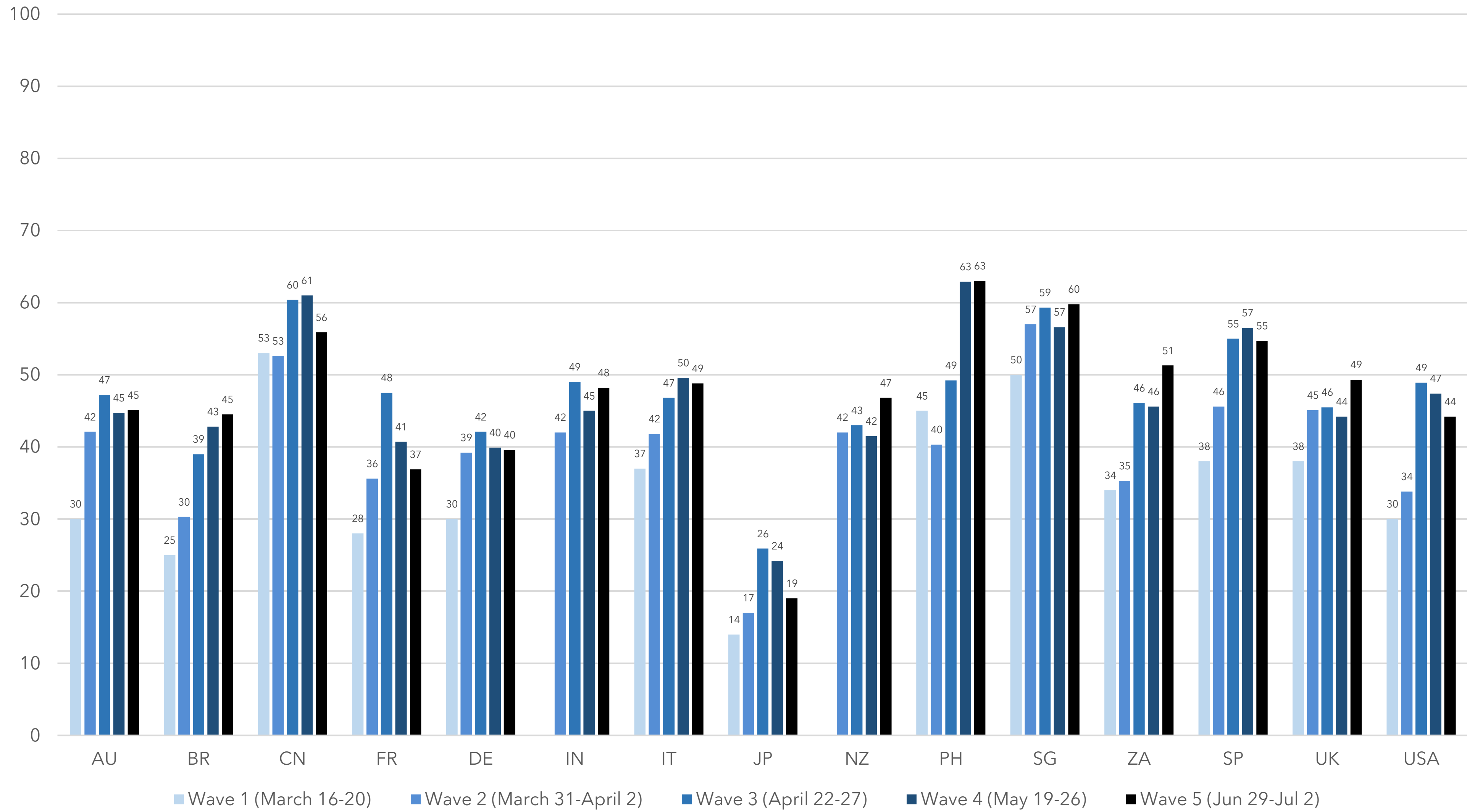
% who say they've delayed purchasing luxury items (e.g. designer clothes, shoes, fragrances, etc.) as a result of the coronavirus / COVID-19 outbreak



Question: Have you delayed purchasing any of the following, as a result of the coronavirus / COVID-19 outbreak? Luxury items (e.g. designer clothes, shoes, fragrances, etc)

Delay to Vacation Purchases: Trended Data

% who say they've delayed purchasing vacations / trips as a result of the coronavirus / COVID-19 outbreak



Question: Have you delayed purchasing any of the following, as a result of the coronavirus / COVID-19 outbreak? Vacations / trips

Expected Length of Purchase Delay

% who say the following is when they plan to buy purchases they have delayed

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
When the outbreak begins to decrease in my country	23	10	14	19	28	18	13	29	22	9	6	13	23	21	13	25	20	14	15
When the outbreak is over in my country	24	19	11	29	23	14	11	38	19	11	14	27	16	17	21	22	20	14	20
When the outbreak begins to decrease globally	9	6	7	7	14	6	7	7	6	3	9	7	8	7	16	8	6	12	4
When the outbreak is over globally	11	11	8	13	10	9	10	16	8	7	13	30	9	11	21	16	8	10	8
Not sure	14	23	23	19	12	18	23	8	25	9	29	17	21	30	17	20	28	25	22

% who say the following is when they plan to buy purchases they have delayed*

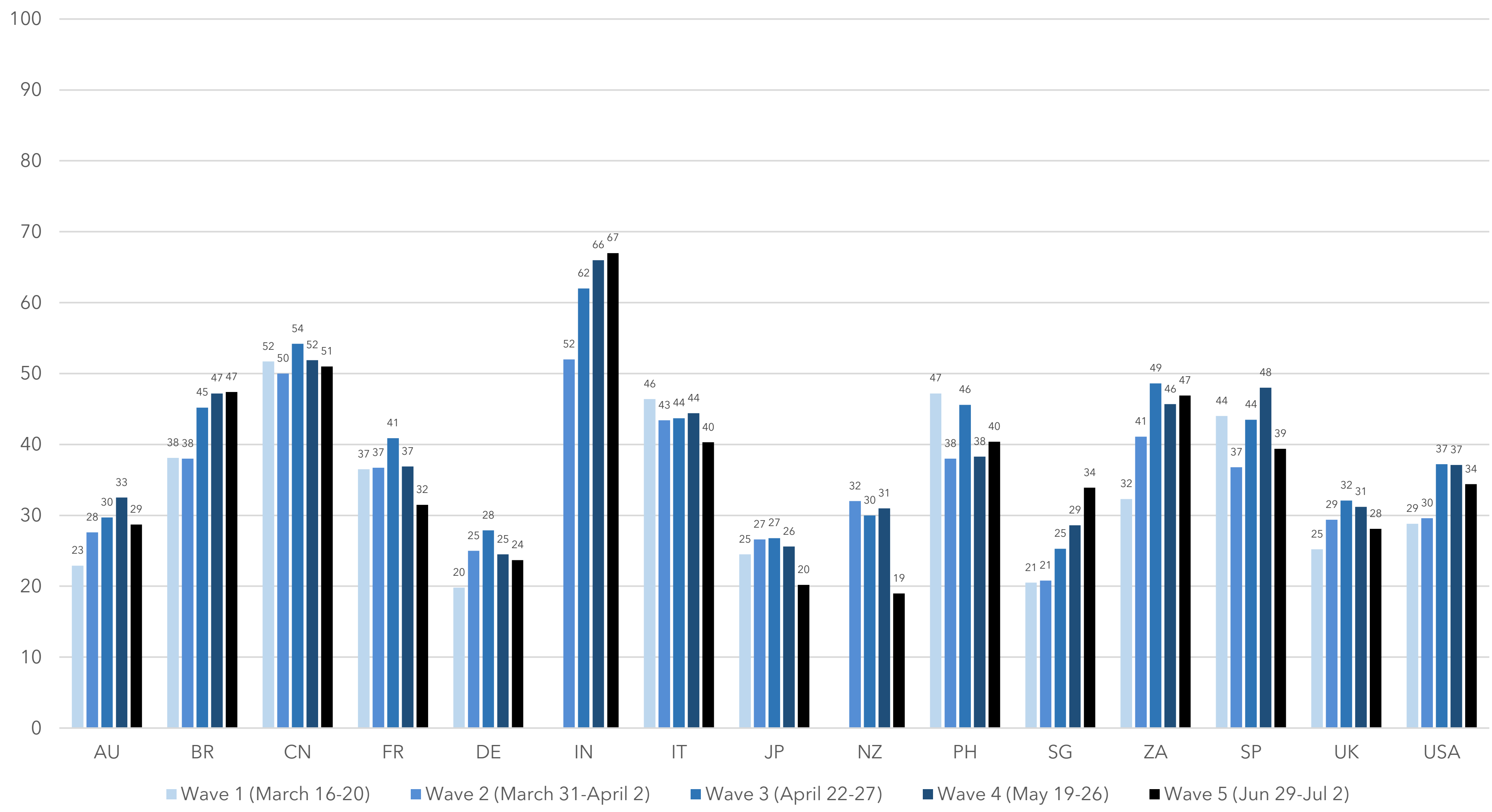
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
When the outbreak begins to decrease in my country	28	26	18	13	22	24	26	20
When the outbreak is over in my country	29	26	21	18	22	26	26	24
When the outbreak begins to decrease globally	9	11	8	5	9	10	11	7
When the outbreak is over globally	11	11	13	7	11	11	13	12
Not sure	12	12	19	24	18	12	12	16

Question: Thinking about large purchases that you have delayed, when do you plan to buy them?

Expected Length of Purchase Delay: Trended Data

% who say they plan to buy purchases they have delayed when the outbreak decreases or is over in their country



Question: Thinking about large purchases that you have delayed, when do you plan to buy them? Chart illustrates combined responses for When the outbreak begins to decrease in my country and When the outbreak is over in my country.

Prioritization of Delayed Purchases

% who say they will prioritize making these large purchases first

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Car / vehicle	11	7	3	10	11	9	10	13	8	3	7	7	5	7	4	16	8	7	9
Clothes	13	8	20	15	10	13	7	23	17	7	11	16	12	16	7	23	19	12	9
Flights	7	9	6	13	6	7	6	8	6	4	11	8	6	8	12	7	8	13	8
Home appliances / devices (e.g. TV, white goods)	12	5	4	11	12	5	5	20	7	6	8	20	9	11	8	13	8	6	6
Home furnishings (e.g. bed, sofa, etc)	7	6	4	11	6	4	4	11	7	2	4	12	8	15	9	14	8	6	5
Insurance	3	1	2	2	3	1	1	7	4	0	2	7	1	3	6	6	2	2	2
Luxury items (e.g. designer clothes, shoes, fragrances, etc)	6	2	2	3	7	1	3	10	2	1	2	4	5	2	3	5	2	2	2
Personal electronics (e.g. laptop, tablet, PC, etc)	12	6	4	10	12	5	5	20	7	3	4	19	8	9	11	12	8	4	6
Smart devices (e.g. smart-watches, fitness trackers, etc)	5	1	2	2	5	1	2	11	2	1	1	3	1	4	3	3	2	1	2
Smartphone	13	6	3	14	15	6	5	23	7	2	4	15	8	10	11	12	8	5	5
Vacations / trips	22	28	19	24	23	22	26	15	25	13	27	17	28	27	33	16	28	31	27

Question: Which large purchases will you prioritize making first? NOTE: Respondents saw this question only if they said they were delaying one of the purchases in the "Delayed Purchases" question. Options they selected in that question were piped in to this question.

Prioritization of Delayed Purchases

% who say they will prioritize making these large purchases first*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Car / vehicle	8	12	11	6	9	12	14	8
Clothes	22	12	11	9	15	12	11	17
Flights	6	8	6	8	8	7	10	5
Home appliances / devices (e.g. TV, white goods)	12	13	11	7	10	13	14	13
Home furnishings (e.g. bed, sofa, etc)	7	8	7	4	7	7	8	8
Insurance	2	5	3	1	3	4	4	3
Luxury items (e.g. designer clothes, shoes, fragrances, etc)	6	7	4	1	5	6	7	5
Personal electronics (e.g. laptop, tablet, PC, etc)	17	13	8	5	10	13	12	14
Smart devices (e.g. smart-watches, fitness trackers, etc)	7	6	3	1	5	5	5	6
Smartphone	20	15	10	4	12	15	14	15
Vacations / trips	14	22	25	29	21	22	27	13

Question: Which large purchases will you prioritize making first? NOTE: Respondents saw this question only if they said they were delaying one of the purchases in the "Delayed Purchases" question. Options they selected in that question were piped in to this question.

In-Home and Media Consumption Changes

% who say they've been doing the following at home because of the coronavirus / COVID-19 outbreak

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Creating / uploading videos (e.g. on YouTube, TikTok, etc)	16	7	6	24	14	7	5	31	12	3	4	24	11	10	11	17	14	7	8
Listening to more podcasts	15	14	10	23	11	10	12	24	10	4	12	16	17	19	11	16	13	13	14
Listening to more radio	19	17	19	21	14	19	27	24	27	9	17	26	36	22	22	35	28	24	17
Listening to more streaming services (e.g. Spotify, Apple Music, etc)	37	21	14	42	45	17	15	48	23	8	20	43	24	17	26	38	28	20	22
Reading more books / listening to more audiobooks	34	20	21	35	37	22	24	44	34	16	26	31	38	32	27	37	39	32	24
Reading more magazines	15	7	10	13	12	15	13	29	18	7	4	13	20	10	12	15	10	9	10
Reading more newspapers	18	11	16	16	11	15	17	45	21	13	10	21	20	11	29	19	18	11	9
Spending longer on messaging services (e.g. WhatsApp, Facebook Messenger, etc)	42	24	30	56	46	30	24	55	48	5	30	59	38	48	45	57	47	35	12
Spending longer on social media (e.g. Facebook, Instagram, Twitter, etc)	43	33	29	54	43	31	19	59	43	23	38	64	45	44	41	55	43	31	28
Spending longer talking on the telephone to others	28	16	24	21	30	26	25	36	39	7	17	20	43	35	17	27	36	27	18
Spending more time on apps	36	21	16	39	41	17	14	49	28	7	18	45	29	34	39	44	26	21	19
Spending more time on computer / video games	35	23	24	45	35	32	21	46	32	24	22	41	35	30	27	35	37	23	24
Spending more time cooking	43	35	30	42	48	41	28	43	48	18	43	49	40	40	44	50	43	38	43
Spending more time on esports	12	4	2	13	13	5	4	23	7	4	4	15	10	9	10	9	16	4	4
Spending more time on hobbies / pastimes	35	26	26	28	37	24	25	44	35	31	28	49	34	31	26	34	17	28	26
Spending more time socializing as a family / household	46	23	27	34	60	33	32	46	37	20	28	65	26	40	33	48	40	23	26
Spending more time using online learning platforms for yourself	31	14	11	37	31	10	8	52	20	6	16	50	22	27	35	44	20	15	12
Spending more time using online learning platforms for your child(ren)	19	8	4	19	28	8	5	19	12	2	8	21	16	15	14	18	13	9	7
Watching more news coverage	56	41	42	51	66	39	44	54	57	50	48	64	57	47	54	58	47	44	36
Watching more shows / films on streaming services (e.g. Netflix)	54	44	30	64	56	37	29	66	48	17	46	63	45	41	50	56	52	51	46
Watching more TV on broadcast channels	39	30	40	36	34	47	30	52	42	48	31	46	44	42	36	43	32	35	31
Watching more videos (e.g. on YouTube)	51	33	22	61	55	26	25	68	40	32	38	73	44	47	56	54	41	33	31
None of these	5	15	15	3	3	11	15	0	4	13	8	0	6	8	3	2	4	6	12

Question: Which of the following have you been doing at home, because of the coronavirus / COVID-19 outbreak? NOTE: In China, named services were replaced with local alternatives.

In-Home and Media Consumption Changes

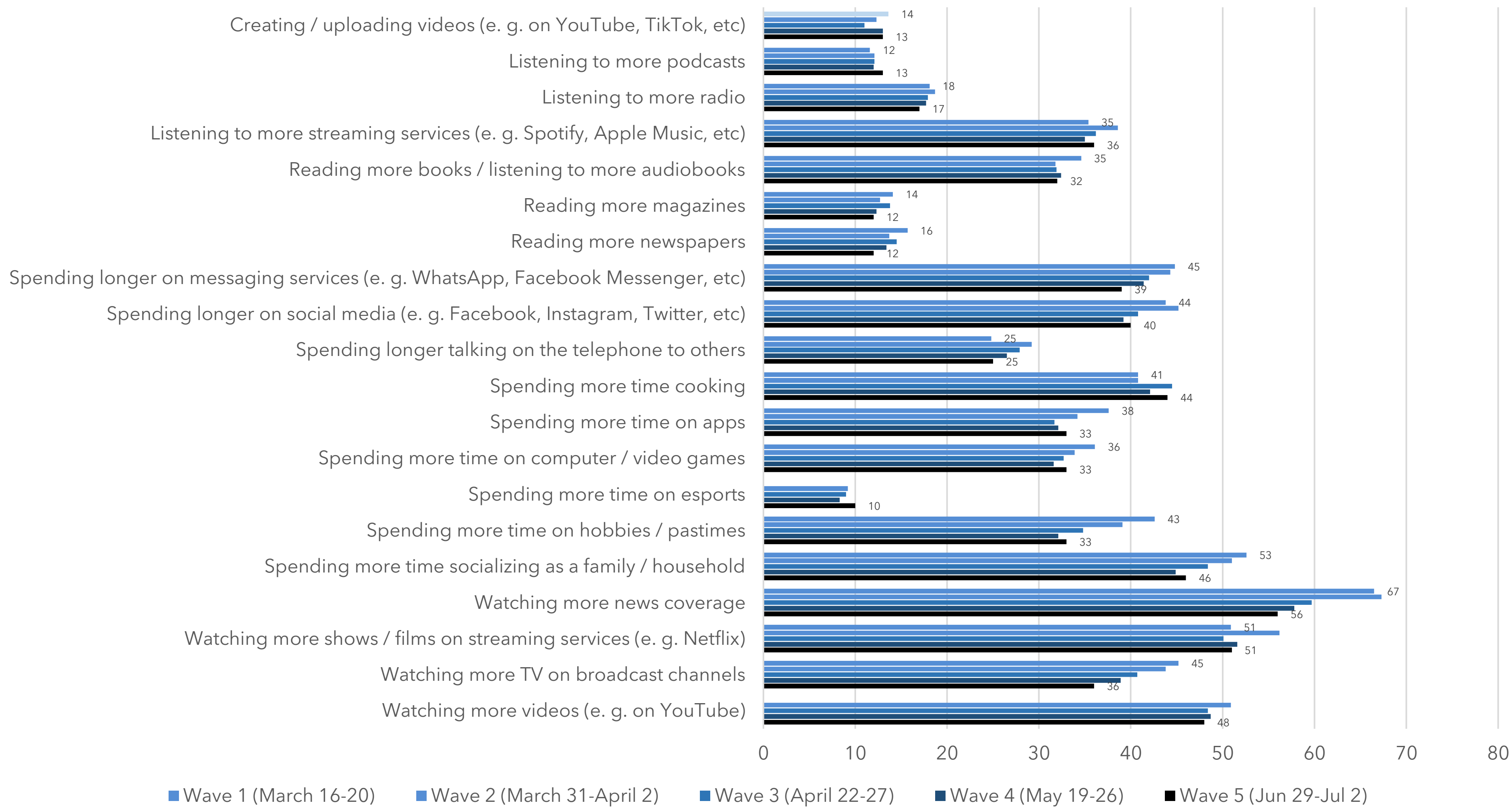
% who say they've been doing the following at home because of the coronavirus / COVID-19 outbreak (using all country data)

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Creating / uploading videos (e.g. on YouTube, TikTok, etc)	27	18	10	3	15	17	19	14
Listening to more podcasts	18	17	11	6	13	16	19	12
Listening to more radio	18	18	20	20	17	21	19	19
Listening to more streaming services (e.g. Spotify, Apple Music, etc)	53	41	27	13	36	39	41	33
Reading more books / listening to more audiobooks	43	34	31	25	37	33	36	33
Reading more magazines	17	16	14	11	15	15	18	14
Reading more newspapers	25	17	16	18	16	20	21	19
Spending longer on messaging services (e.g. WhatsApp, Facebook Messenger, etc)	52	42	38	24	42	42	44	36
Spending longer on social media (e.g. Facebook, Instagram, Twitter, etc)	59	44	36	26	46	41	46	38
Spending longer talking on the telephone to others	27	29	26	26	28	27	31	25
Spending more time on apps	50	39	28	14	34	37	37	35
Spending more time on computer / video games	48	37	28	19	31	38	34	33
Spending more time cooking	41	43	47	38	49	39	49	39
Spending more time on esports	18	15	7	1	11	14	15	11
Spending more time on hobbies / pastimes	43	36	29	30	36	34	37	32
Spending more time socializing as a family / household	51	45	47	33	48	44	47	40
Spending more time using online learning platforms for yourself	46	33	22	13	31	31	34	29
Spending more time using online learning platforms for your child(ren)	3	24	25	5	19	20	30	11
Watching more news coverage	51	54	60	57	56	56	56	49
Watching more shows / films on streaming services (e.g. Netflix)	65	57	47	32	54	53	57	43
Watching more TV on broadcast channels	38	37	40	44	36	41	42	35
Watching more videos (e.g. on YouTube)	69	54	42	24	49	53	50	47
None of these	2	4	6	11	4	5	3	6

Question: Which of the following have you been doing at home, because of the coronavirus / COVID-19 outbreak? NOTE: In China, named services were replaced with local alternatives

In-Home and Media Consumption Changes: Trended Data

% who say they've been doing the following at home because of the coronavirus / COVID-19 outbreak (average across all 13 markets included in all five waves)



Question: Which of the following have you been doing at home, because of the coronavirus / COVID-19 outbreak? NOTE: Spending more time on esports and Watching more videos were new addition to this question in Wave 2, and are therefore excluded from the Wave 1 data.

In-Home Behaviors and Media Consumption – Permanent Changes Expected

% who say they expect to carry on doing the following, once the coronavirus / COVID-19 outbreak is over

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Creating / uploading videos (e.g. on YouTube, TikTok, etc)	7	3	2	12	5	2	2	17	4	1	2	13	5	3	5	9	4	2	4
Listening to more podcasts	6	8	4	12	3	4	4	10	3	2	5	8	8	6	5	9	5	7	7
Listening to more radio	8	8	8	9	4	7	12	11	8	3	7	10	19	9	10	20	12	10	8
Listening to more streaming services (e.g. Spotify, Apple Music, etc)	17	9	5	23	19	8	7	26	6	3	10	24	10	8	13	19	10	9	9
Reading more books / listening to more audiobooks	17	12	11	22	14	10	13	24	15	7	16	17	24	17	14	23	19	19	15
Reading more magazines	6	3	4	6	3	4	5	14	4	2	1	5	10	3	4	7	3	3	3
Reading more newspapers	8	5	6	8	4	6	7	23	6	5	3	11	8	5	14	10	6	5	4
Spending longer on messaging services (e.g. WhatsApp, Facebook Messenger, etc)	18	10	10	26	20	11	7	28	12	2	8	29	15	21	21	28	15	9	4
Spending longer on social media (e.g. Facebook, Instagram, Twitter, etc)	18	9	7	25	19	10	5	29	8	10	12	30	17	14	17	22	13	5	8
Spending longer talking on the telephone to others	10	5	8	8	11	8	7	13	9	2	6	7	16	12	5	10	8	8	7
Spending more time on apps	13	6	3	11	17	5	3	17	5	3	4	16	9	10	13	16	6	4	5
Spending more time cooking	23	24	18	20	25	22	14	21	24	5	28	31	19	23	21	35	15	22	26
Spending more time on computer / video games	12	9	4	19	10	9	8	20	8	10	7	17	11	11	10	14	10	6	8
Spending more time on esports	5	1	0	6	5	1	2	9	3	2	1	6	3	3	3	4	4	2	1
Spending more time on hobbies / pastimes	18	16	14	15	19	13	12	21	19	19	16	20	17	19	13	20	4	14	15
Spending more time socializing as a family / household	29	13	16	19	40	21	20	24	24	7	16	48	14	23	18	32	20	12	16
Spending more time using online learning platforms for yourself	15	7	3	18	15	3	3	25	7	3	6	28	7	10	17	25	8	5	6
Spending more time using online learning platforms for your child(ren)	8	3	1	8	12	2	1	8	4	1	2	14	5	4	6	8	4	3	2
Watching more news coverage	23	12	13	22	29	10	17	25	12	17	14	35	20	14	27	26	13	11	12
Watching more shows / films on streaming services (e.g. Netflix)	23	20	12	35	19	19	14	35	17	8	20	35	20	19	26	30	21	19	21
Watching more TV on broadcast channels	12	9	11	14	7	13	9	22	8	21	8	17	12	11	12	16	8	10	12
Watching more videos (e.g. on YouTube)	24	17	7	32	23	9	9	37	11	13	14	43	18	19	28	28	14	13	14
None of these	8	12	15	7	5	15	14	4	16	21	15	3	10	14	14	3	18	20	14

Question: Once the coronavirus outbreak is over, do you think you'll carry on doing the following? NOTE: Options are routed from "In-Home & Media Consumption Changes".

In-Home Behaviors and Media Consumption – Permanent Changes Expected

% who say they expect to carry on doing the following, once the coronavirus / COVID-19 outbreak is over (using all country data)

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Creating / uploading videos (e.g. on YouTube, TikTok, etc)	11	9	4	1	6	9	10	7
Listening to more podcasts	7	6	5	3	5	6	7	6
Listening to more radio	6	7	9	9	6	9	7	8
Listening to more streaming services (e.g. Spotify, Apple Music, etc)	27	18	12	5	17	17	19	18
Reading more books / listening to more audiobooks	21	17	14	14	18	15	15	18
Reading more magazines	6	6	5	4	5	6	7	5
Reading more newspapers	11	8	7	9	7	10	9	9
Spending longer on messaging services (e.g. WhatsApp, Facebook Messenger, etc)	24	19	15	8	18	19	19	18
Spending longer on social media (e.g. Facebook, Instagram, Twitter, etc)	28	19	13	8	19	18	19	16
Spending longer talking on the telephone to others	8	11	9	9	10	9	11	9
Spending more time on apps	18	14	9	4	12	14	14	13
Spending more time cooking	20	23	24	20	26	20	25	20
Spending more time on computer / video games	20	13	8	4	10	15	12	11
Spending more time on esports	7	6	2	0	4	5	7	5
Spending more time on hobbies / pastimes	22	18	16	17	18	18	20	16
Spending more time socializing as a family / household	28	29	29	21	31	27	31	22
Spending more time using online learning platforms for yourself	23	16	9	5	15	14	17	12
Spending more time using online learning platforms for your child(ren)	1	11	9	3	8	8	14	5
Watching more news coverage	20	23	27	19	23	24	24	21
Watching more shows / films on streaming services (e.g. Netflix)	28	25	19	14	22	24	24	21
Watching more TV on broadcast channels	13	12	12	13	10	14	13	13
Watching more videos (e.g. on YouTube)	33	27	16	9	22	25	23	23
None of these	5	6	11	18	8	8	7	8

Question: Once the coronavirus outbreak is over, do you think you'll carry on doing the following? NOTE: Options are routed from "In-Home & Media Consumption Changes".

In-Home Behaviors and Media Consumption: Permanent Changes – Trended Data

% who say they expect to carry on doing the following, once the coronavirus / COVID-19 outbreak is over (average across all 15 markets included in all four waves)

Question: Once the coronavirus outbreak is over, do you think you'll carry on doing the following? NOTE: Options are routed from "In-Home & Media Consumption Changes".

Device Usage

% who say they're spending more time using the following devices since the start of the coronavirus / COVID-19 outbreak

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Games console	18	14	11	29	15	20	14	24	14	16	10	14	19	7	12	17	17	17	20
Laptop	47	39	40	46	44	41	32	63	47	12	41	63	59	59	51	62	50	46	41
PC / desktop	33	23	26	44	34	30	22	39	29	48	20	41	27	44	29	30	30	16	21
Smart speaker	14	5	3	7	17	5	5	23	6	5	2	9	4	7	7	9	10	8	9
Smart TV / media streaming device	32	22	9	53	31	13	22	41	28	6	21	35	24	27	25	27	35	24	24
Smartphone / mobile phone	70	41	45	80	82	49	37	78	64	39	48	88	61	68	69	75	62	46	43
Smartwatch	9	3	4	10	8	3	5	18	6	4	2	7	10	7	8	7	7	5	5
Tablet	23	19	14	17	27	16	15	23	23	15	17	26	16	21	24	19	29	26	22
Other	1	1	1	1	1	1	2	2	4	1	1	2	1	1	1	1	2	1	1
None of these	6	19	20	2	3	18	26	1	4	20	13	0	7	5	4	3	3	14	18

Question: Which device(s) have you been spending more time using since the start of the coronavirus / COVID-19 outbreak?

Device Usage

% who say they're spending more time using the following devices since the start of the coronavirus / COVID-19 outbreak*

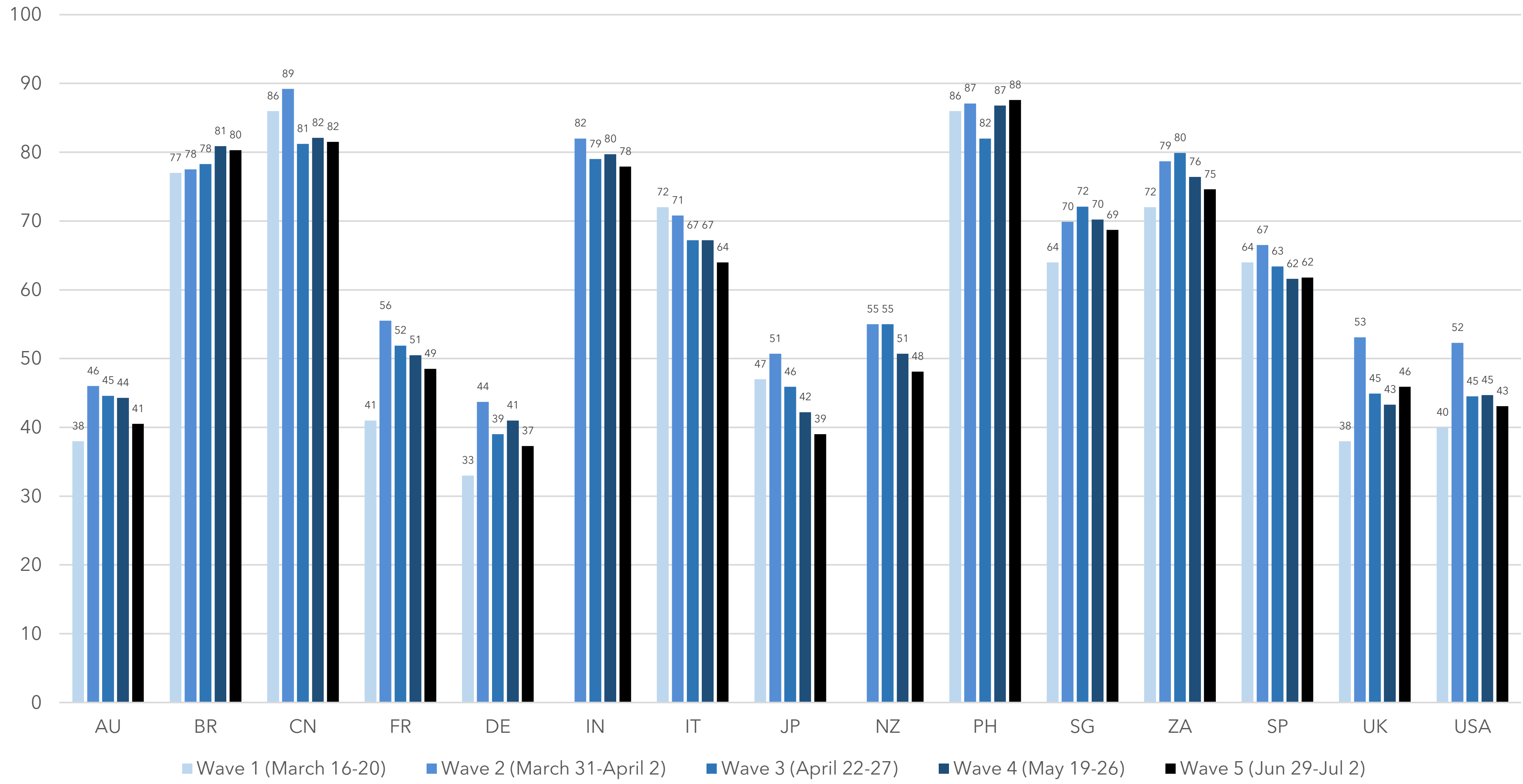
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Games console	16	25	11	3	14	22	24	13
Laptop	62	47	41	35	45	48	49	42
PC / desktop	33	33	34	34	28	38	33	31
Smart speaker	13	17	11	4	12	16	19	9
Smart TV / media streaming device	27	36	31	18	30	33	40	24
Smartphone / mobile phone	79	72	66	49	71	70	70	67
Smartwatch	11	12	5	1	9	10	13	7
Tablet	20	27	20	21	25	22	29	18
Other	1	1	1	1	1	1	1	1
None of these	2	5	9	16	7	6	6	7

Question: Which device(s) have you been spending more time using since the start of the coronavirus / COVID-19 outbreak?

Smartphone Usage: Trended Data

% who say they're spending more time using a smartphone since the start of the coronavirus / COVID-19 outbreak



Question: Which device(s) have you been spending more time using since the start of the coronavirus / COVID-19 outbreak? Smartphone / mobile phone

Levels of Approval for Brand Activities: Running “Normal” Advertising Campaigns

% who approve / disapprove of brands running "normal" advertising campaigns (which aren't related to coronavirus)

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	20	18	18	32	9	27	21	32	33	12	21	17	33	28	12	23	29	15	25
Somewhat approve	35	33	35	27	36	30	35	42	36	27	33	41	37	43	42	37	34	33	28
Neither approve nor disapprove	33	38	37	27	41	33	30	14	23	51	40	23	23	23	36	22	30	39	37
Somewhat disapprove	8	7	7	9	9	6	8	7	5	6	4	14	5	5	8	10	3	7	6
Strongly disapprove	5	3	3	5	5	5	6	5	2	4	2	4	2	1	3	8	4	5	4

% who approve / disapprove of brands running "normal" advertising campaigns (which aren't related to coronavirus)*

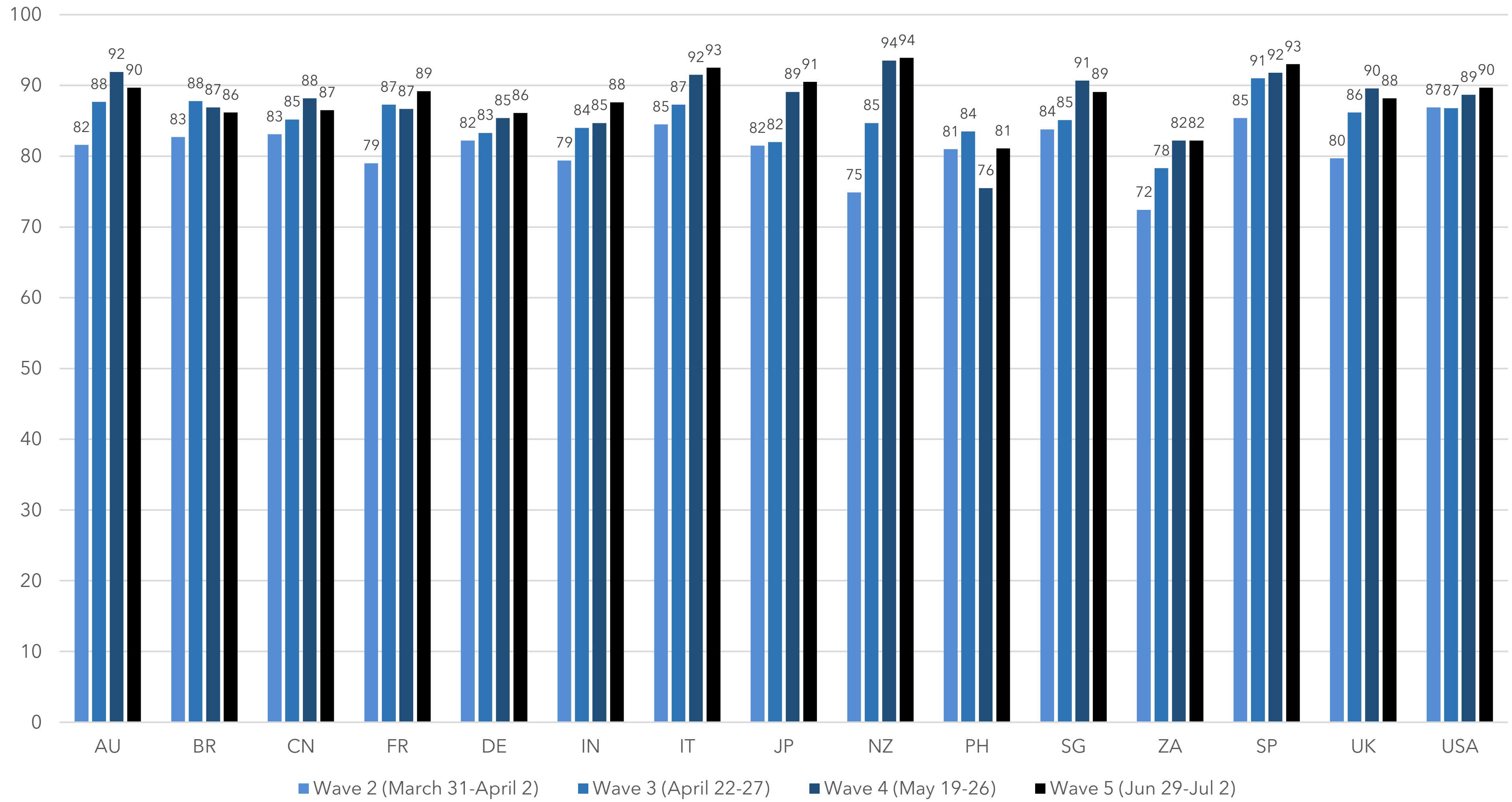
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly approve	22	21	17	17	18	21	22	18
Somewhat approve	38	35	35	27	35	35	37	34
Neither approve nor disapprove	29	31	36	42	35	31	29	37
Somewhat disapprove	6	8	8	7	8	8	7	7
Strongly disapprove	5	5	4	7	4	5	4	4

Question: Many brands and companies are trying to decide how best to respond to the coronavirus / COVID-19 outbreak. To what extent do you approve / disapprove of them doing the following at the moment? Running "normal" advertising campaigns (which aren't related to coronavirus)

Running "Normal" Advertising Campaigns – Trended Data

% who strongly or somewhat approve, or neither approve/disapprove, of brands running "normal" advertising campaigns (which aren't related to coronavirus)



Question: Many brands and companies are trying to decide how best to respond to the coronavirus / COVID-19 outbreak. To what extent do you approve / disapprove of them doing the following at the moment? Running "normal" advertising campaigns (which aren't related to coronavirus). Chart illustrates combined responses for Strongly Approve, Somewhat Approve, Neither Approve nor Disapprove.

Levels of Approval for Brand Activities: Running Advertising in Response to CV-19

% who approve / disapprove of brands running advertising which shows how they are responding to coronavirus or helping customers

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	36	23	18	55	33	20	15	49	38	19	21	58	26	22	23	49	29	23	23
Somewhat approve	41	40	40	29	51	33	36	36	36	35	42	32	43	43	51	31	38	38	34
Neither approve nor disapprove	16	29	30	11	12	29	25	7	18	39	28	6	17	23	20	13	23	30	31
Somewhat disapprove	4	4	7	4	2	10	12	6	4	3	6	3	9	6	4	4	5	6	7
Strongly disapprove	3	4	5	2	1	8	13	2	5	3	3	1	5	6	3	3	5	4	5

% who approve / disapprove of brands running advertising which shows how they are responding to coronavirus or helping customers*

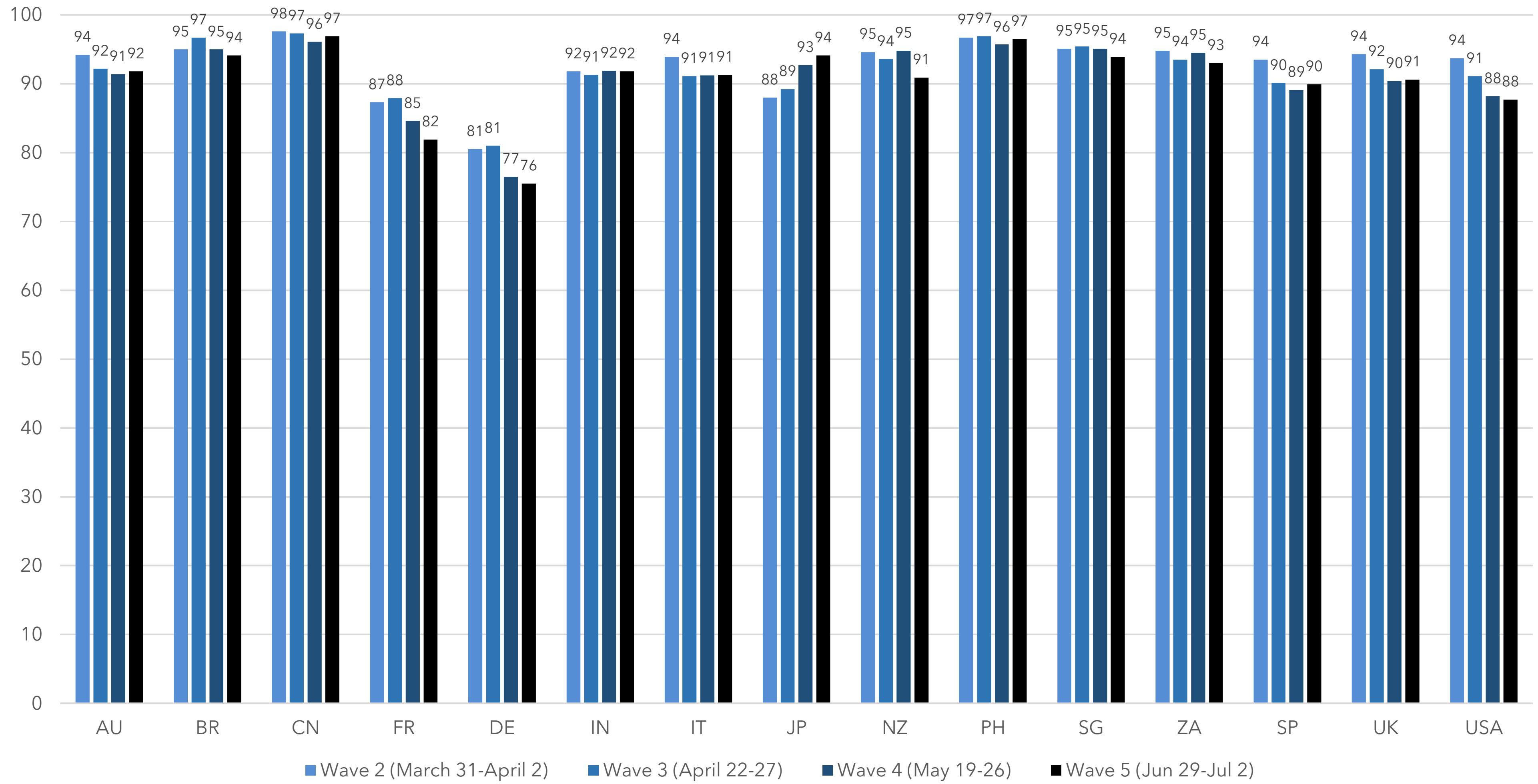
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly approve	39	36	34	27	36	35	39	31
Somewhat approve	47	41	39	36	43	40	40	40
Neither approve nor disapprove	8	15	20	28	15	17	14	19
Somewhat disapprove	5	4	5	5	4	5	4	7
Strongly disapprove	1	3	3	4	2	3	3	3

Question: Many brands and companies are trying to decide how best to respond to the coronavirus / COVID-19 outbreak. To what extent do you approve / disapprove of them doing the following at the moment? Running advertising which shows how they are responding to coronavirus or helping customers

Running Advertising in Response to CV-19 – Trended Data

% who strongly or somewhat approve, or neither approve/disapprove, of brands running advertising which shows how they are responding to coronavirus or helping customers



Question: Many brands and companies are trying to decide how best to respond to the coronavirus / COVID-19 outbreak. To what extent do you approve / disapprove of them doing the following at the moment? Running advertising which shows how they are responding to coronavirus or helping customers. Chart illustrates combined responses for Strongly Approve, Somewhat Approve, Neither Approve nor Disapprove

Levels of Approval for Brand Activities: Running Promotions for Customers

% who approve / disapprove of brands running promotions / offers / loyalty perks for customers

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	51	38	46	74	48	46	29	58	62	21	43	62	57	54	40	61	54	36	45
Somewhat approve	34	35	30	17	41	28	39	28	23	32	33	28	27	28	43	26	26	36	32
Neither approve nor disapprove	12	22	18	6	8	19	20	7	12	41	20	6	12	14	13	7	14	23	19
Somewhat disapprove	3	3	4	2	1	6	5	6	1	4	3	2	2	2	3	3	3	2	3
Strongly disapprove	1	2	3	1	1	2	6	1	2	2	1	1	2	1	1	2	2	3	2

% who approve / disapprove of brands running promotions / offers / loyalty perks for customers*

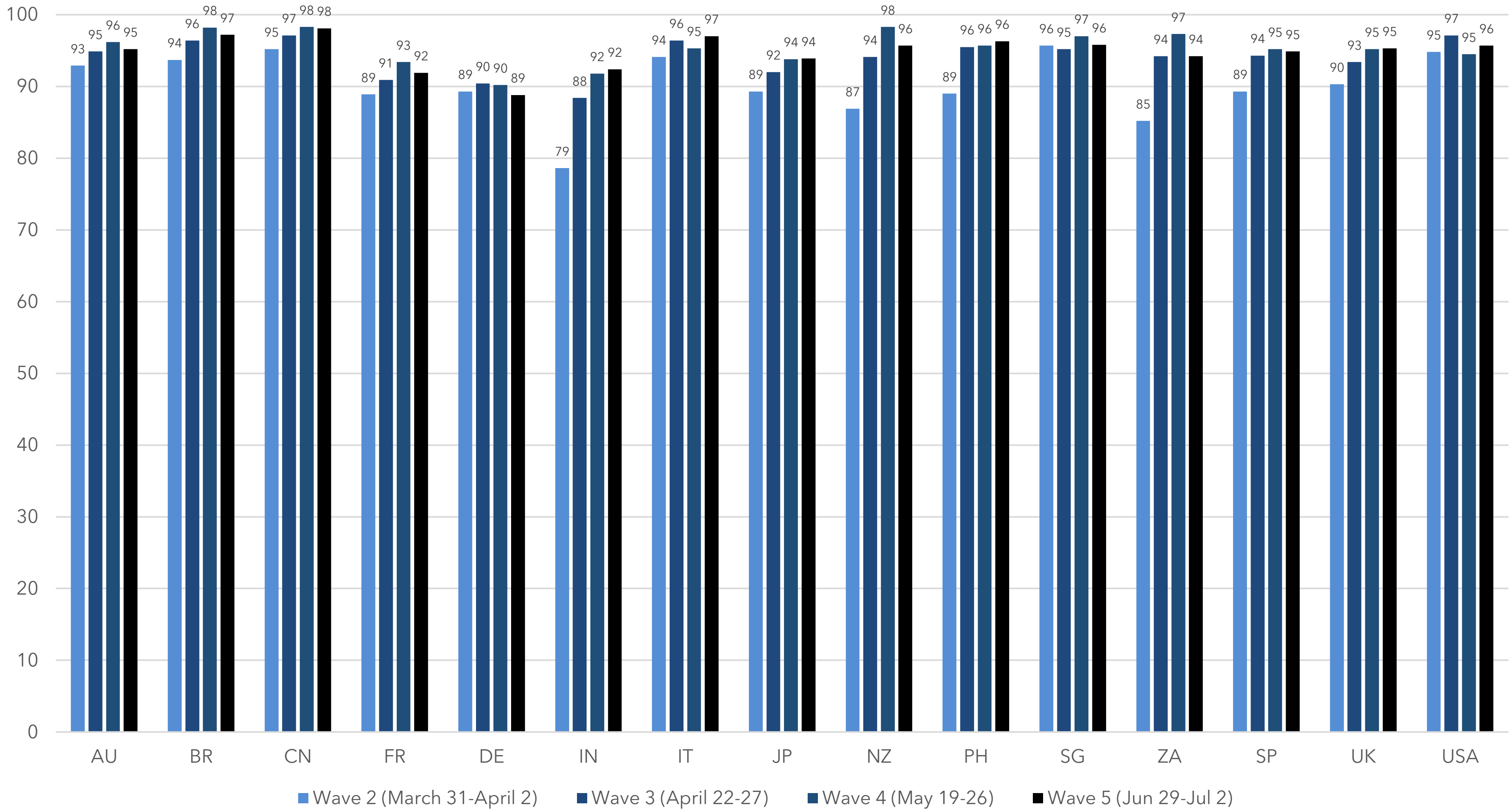
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly approve	54	51	48	46	53	49	52	45
Somewhat approve	32	35	34	32	32	35	34	34
Neither approve nor disapprove	9	10	15	19	12	12	10	15
Somewhat disapprove	5	3	2	1	2	3	3	4
Strongly disapprove	1	2	1	2	1	2	1	2

Question: Many brands and companies are trying to decide how best to respond to the coronavirus / COVID-19 outbreak. To what extent do you approve / disapprove of them doing the following at the moment? Running promotions / offers / loyalty perks for customers

Running Promotions for Customers – Trended Data

% who strongly or somewhat approve, or neither approve/disapprove, of brands running promotions / offers / loyalty perks for customers



Question: Many brands and companies are trying to decide how best to respond to the coronavirus / COVID-19 outbreak. To what extent do you approve / disapprove of them doing the following at the moment? Running promotions / offers / loyalty perks for customers. Chart illustrates combined responses for Strongly Approve, Somewhat Approve, Neither Approve nor Disapprove.

Levels of Approval for Brand Activities: Contacting Customers About CV-19 Response

% who approve / disapprove of brands contacting customers (e.g. via email) to let them know how they are responding to coronavirus

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	35	19	16	45	39	17	13	46	23	17	16	51	23	18	21	40	26	22	20
Somewhat approve	38	40	34	32	44	34	33	33	35	32	40	34	39	33	50	34	39	38	36
Neither approve nor disapprove	18	32	32	16	14	27	22	10	26	42	31	9	22	27	22	13	25	30	33
Somewhat disapprove	5	5	10	5	2	10	14	7	7	5	7	5	8	10	4	7	5	7	7
Strongly disapprove	4	5	9	3	1	12	18	3	8	4	6	2	9	12	3	6	5	4	5

% who approve / disapprove of brands contacting customers (e.g. via email) to let them know how they are responding to coronavirus*

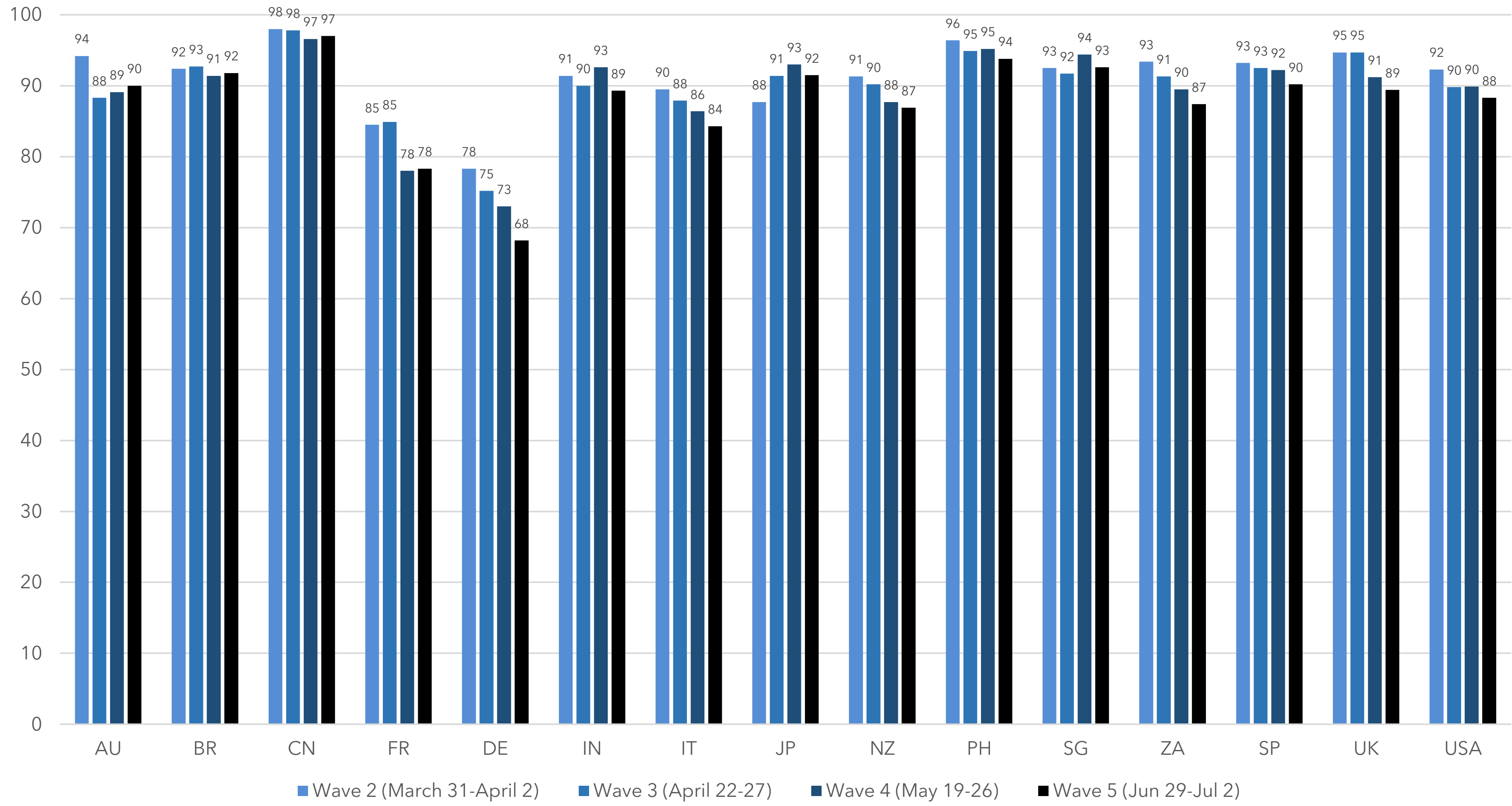
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly approve	43	37	31	20	35	36	40	31
Somewhat approve	37	40	37	36	39	38	37	39
Neither approve nor disapprove	13	15	23	31	19	17	16	21
Somewhat disapprove	5	5	5	6	4	6	4	5
Strongly disapprove	2	3	4	8	4	4	3	4

Question: Many brands and companies are trying to decide how best to respond to the coronavirus / COVID-19 outbreak. To what extent do you approve / disapprove of them doing the following at the moment? Contacting customers (e.g. via email) to let them know how they are responding to coronavirus

Contacting Customers About CV-19 Response – Trended Data

% who strongly or somewhat approve, or neither approve/disapprove, of brands contacting customers (e.g. via email) to let them know how they are responding to coronavirus



Question: Many brands and companies are trying to decide how best to respond to the coronavirus / COVID-19 outbreak. To what extent do you approve / disapprove of them doing the following at the moment? Contacting customers (e.g. via email) to let them know how they are responding to coronavirus. Chart illustrates combined responses for Strongly Approve, Somewhat Approve, Neither Approve nor Disapprove.

Levels of Approval for Brand Activities: Offering Flexible Payment Terms

% who approve / disapprove of brands offering flexible payment terms (e.g. instalments, payment plans, etc)

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	44	38	27	74	36	29	26	58	52	16	33	67	47	43	33	61	53	34	45
Somewhat approve	36	34	30	19	47	34	39	31	30	33	37	25	31	34	49	29	28	34	29
Neither approve nor disapprove	15	22	27	5	15	25	21	5	14	44	24	4	17	19	14	6	14	25	23
Somewhat disapprove	3	3	8	1	2	6	7	4	2	4	4	3	3	2	4	2	2	4	1
Strongly disapprove	2	3	9	1	1	6	7	3	2	3	2	1	3	1	1	3	3	4	2

% who approve / disapprove of brands offering flexible payment terms (e.g. instalments, payment plans, etc)*

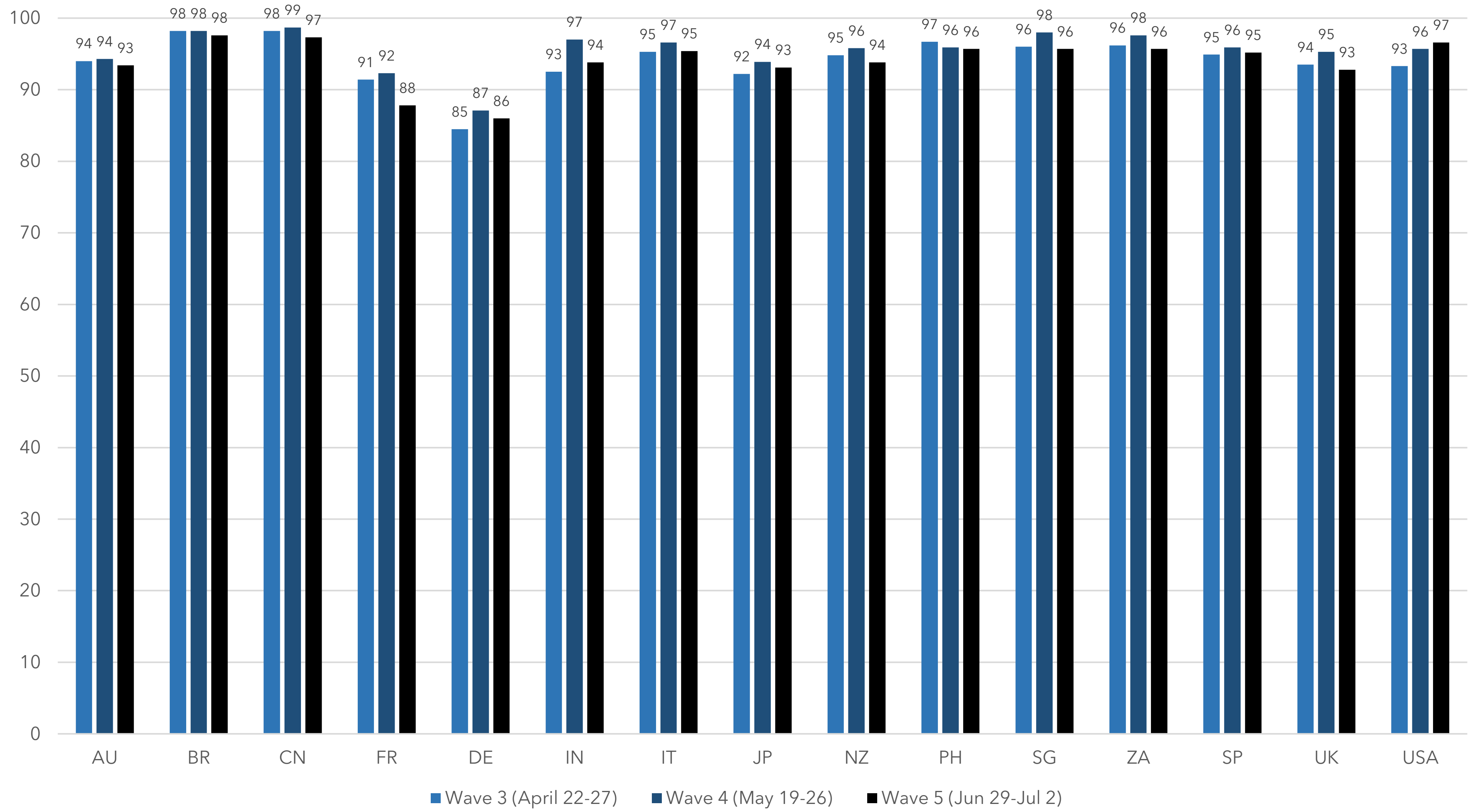
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly approve	50	45	41	37	45	44	48	41
Somewhat approve	36	37	37	33	36	37	37	35
Neither approve nor disapprove	9	13	18	26	15	15	11	18
Somewhat disapprove	2	3	3	2	3	2	3	3
Strongly disapprove	3	2	2	3	2	2	2	3

Question: Many brands and companies are trying to decide how best to respond to the coronavirus / COVID-19 outbreak. To what extent do you approve / disapprove of them doing the following at the moment? Offering flexible payment terms (e.g. instalments, payment plans, etc.)

Flexible Payment Terms – Trended Data

% who strongly or somewhat approve, or neither approve/disapprove, of brands offering flexible payment terms



Question: Many brands and companies are trying to decide how best to respond to the coronavirus / COVID-19 outbreak. To what extent do you approve / disapprove of them doing the following at the moment? Offering flexible payment terms (e.g. instalments, payment plans, etc.). Chart illustrates combined responses for Strongly Approve, Somewhat Approve, Neither Approve nor Disapprove.

Levels of Support for Initiatives – Tracing Apps

% who say they support or oppose governments using tracing apps

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly support	41	23	20	38	45	16	25	60	25	14	32	66	11	17	25	35	23	31	24
Somewhat support	32	28	27	28	39	22	31	25	37	29	36	24	29	36	44	34	35	33	26
Neither support nor oppose	14	29	21	15	12	21	18	5	17	37	19	6	18	22	19	13	17	21	21
Somewhat oppose	6	8	12	8	3	15	11	6	9	11	6	2	16	11	7	5	12	7	9
Strongly oppose	7	13	20	11	1	25	15	4	13	9	7	2	26	15	6	13	13	8	20

% who say they support or oppose governments using tracing apps*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly support	45	42	39	30	39	42	45	38
Somewhat support	31	33	32	29	32	32	32	29
Neither support nor oppose	13	13	16	21	17	12	11	18
Somewhat oppose	8	6	6	8	6	6	6	8
Strongly oppose	4	7	8	12	6	8	7	7

Question: How much do you support or oppose the following? Governments using contact tracing apps / systems to control the spread of the virus.

Levels of Support for Initiatives – Demonstrations in Public Places

% who say they support or oppose demonstrators gathering in public places to protest

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly support	13	7	6	9	7	10	9	29	11	4	6	11	13	9	7	14	10	6	18
Somewhat support	14	13	11	12	10	16	19	17	24	10	17	12	19	22	14	16	17	16	19
Neither support nor oppose	13	17	12	13	11	15	15	6	15	29	20	12	21	26	17	14	18	11	20
Somewhat oppose	14	14	20	14	15	18	21	12	16	16	20	12	21	18	17	15	21	17	12
Strongly oppose	46	49	51	53	57	42	36	36	34	42	37	53	26	25	45	42	34	50	31

% who say they support or oppose demonstrators gathering in public places to protest*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly support	14	15	10	6	11	14	15	13
Somewhat support	16	15	12	11	13	15	15	17
Neither support nor oppose	11	12	15	15	14	12	12	14
Somewhat oppose	15	15	13	16	15	14	14	15
Strongly oppose	43	44	50	52	48	45	44	41

Question: How much do you support or oppose the following? Demonstrators gathering in public places to protest.

Levels of Support for Initiatives – Reopening Large Indoor Venues

% who say they support or oppose large indoor venues being reopened

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly support	13	9	12	15	9	20	13	25	16	8	13	8	16	16	8	13	8	8	9
Somewhat support	26	26	20	19	32	28	23	24	35	27	33	22	31	36	22	19	25	17	16
Neither support nor oppose	22	21	24	13	28	22	14	12	16	35	26	18	21	21	20	14	18	22	21
Somewhat oppose	21	23	22	19	22	18	24	18	18	19	19	27	20	17	28	22	26	30	20
Strongly oppose	19	22	22	35	9	12	26	23	15	10	10	24	11	9	22	32	23	25	33

% who say they support or oppose large indoor venues being reopened*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly support	12	15	11	6	12	14	15	13
Somewhat support	26	29	24	16	24	28	27	26
Neither support nor oppose	20	21	24	23	22	21	18	23
Somewhat oppose	24	19	21	25	22	20	20	21
Strongly oppose	18	16	20	30	20	17	20	17

Question: How much do you support or oppose the following? Large indoor venues being re-opened.

Vacation Types in Next Year

% who say they expect to take the following types of vacation in the next 12 months

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Cruise	4	4	3	5	2	4	4	6	3	1	2	2	2	2	5	4	3	3	7
Domestic vacation in your country	48	47	25	40	55	45	36	49	49	27	61	37	52	54	14	43	56	38	46
Foreign long-haul vacation (i.e. in a different part of the world)	9	13	11	14	6	11	11	16	5	4	10	8	8	7	20	9	6	21	7
Foreign short-haul vacation (i.e. in a nearby country)	13	10	34	12	13	15	22	16	12	3	13	12	12	14	32	9	9	29	6
Staycation in your local area	32	19	12	22	43	14	16	24	23	40	17	29	16	23	20	21	20	20	27
I'm not planning on taking any vacations	28	33	36	28	24	31	35	28	24	44	23	33	25	24	35	35	24	30	35

% who say they expect to take the following types of vacation in the next 12 months*

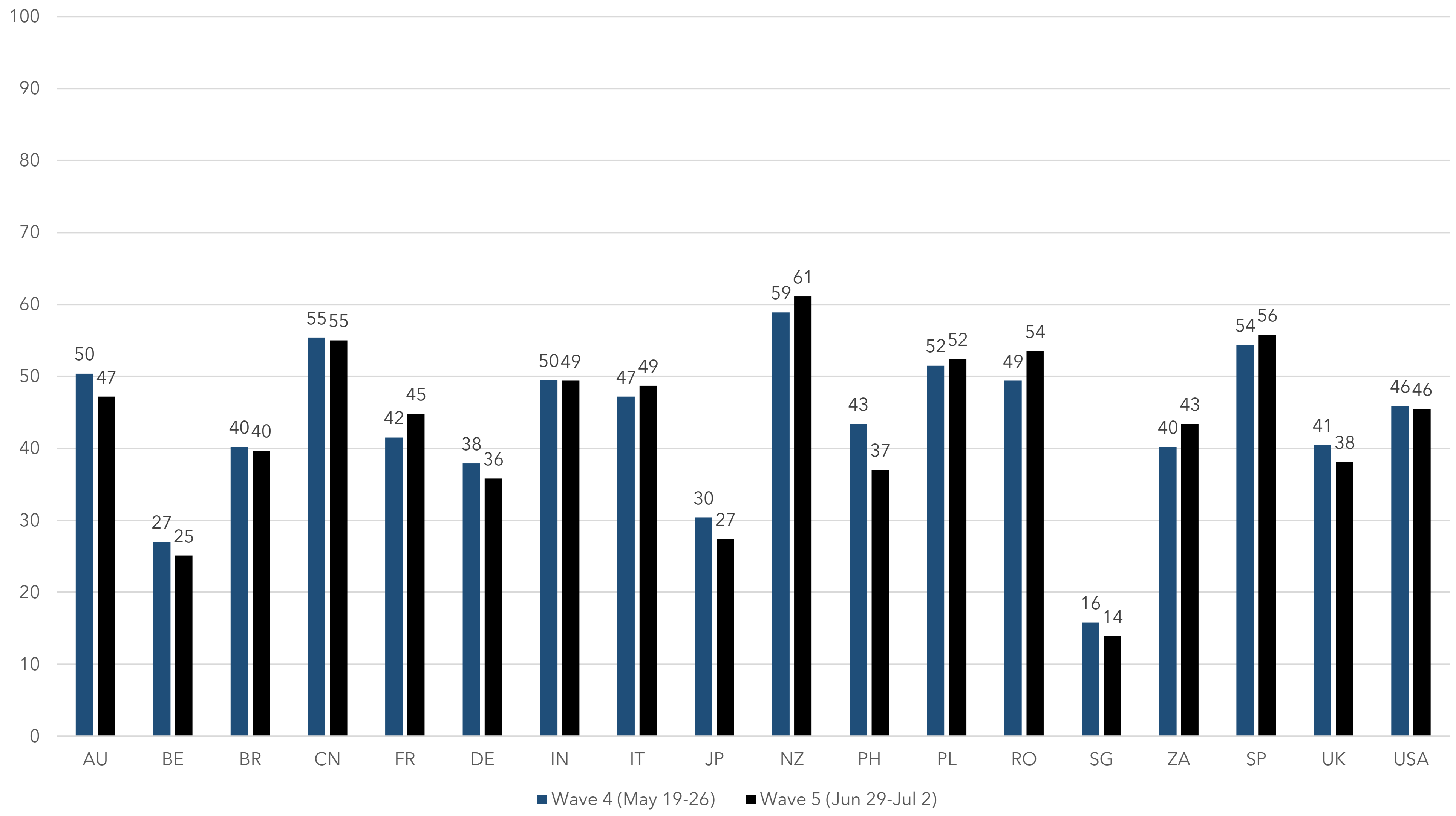
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Cruise	3	5	3	2	3	4	5	3
Domestic vacation in your country	47	51	46	43	46	51	56	36
Foreign long-haul vacation (i.e. in a different part of the world)	9	12	7	6	8	11	14	8
Foreign short-haul vacation (i.e. in a nearby country)	10	16	11	8	12	14	17	9
Staycation in your local area	28	34	32	20	32	31	34	25
I'm not planning on taking any vacations	31	24	32	39	30	27	20	41

Question: Which type(s) of vacation do you think you'll take in the next 12 months?

Domestic Vacations in Next Year – Trended Data

% who say they expect to take a domestic vacation in the next 12 months



Question: Which type(s) of vacation do you think you'll take in the next 12 months? Domestic vacation in your own country

Post-Outbreak Leisure Behaviors

% who expect to do the following after the outbreak is over

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Cancel a gym membership	11	9	6	10	10	7	8	18	8	5	7	16	6	7	8	14	12	10	10
Eat out at restaurants less often	42	31	28	42	39	27	47	55	32	21	28	57	23	33	45	60	34	37	40
Eat at fast-food outlets less often	31	22	19	31	28	23	31	50	18	11	27	50	20	30	26	43	22	25	21
Visit bars / pubs less often	31	26	21	34	34	20	36	30	22	11	20	41	23	34	23	39	32	37	26
Visit the cinema less often	38	25	19	37	39	23	39	52	25	14	17	47	20	23	31	44	30	28	32
None of these	31	49	54	28	29	52	33	13	47	69	52	14	55	43	35	18	40	44	42

% who expect to do the following after the outbreak is over*

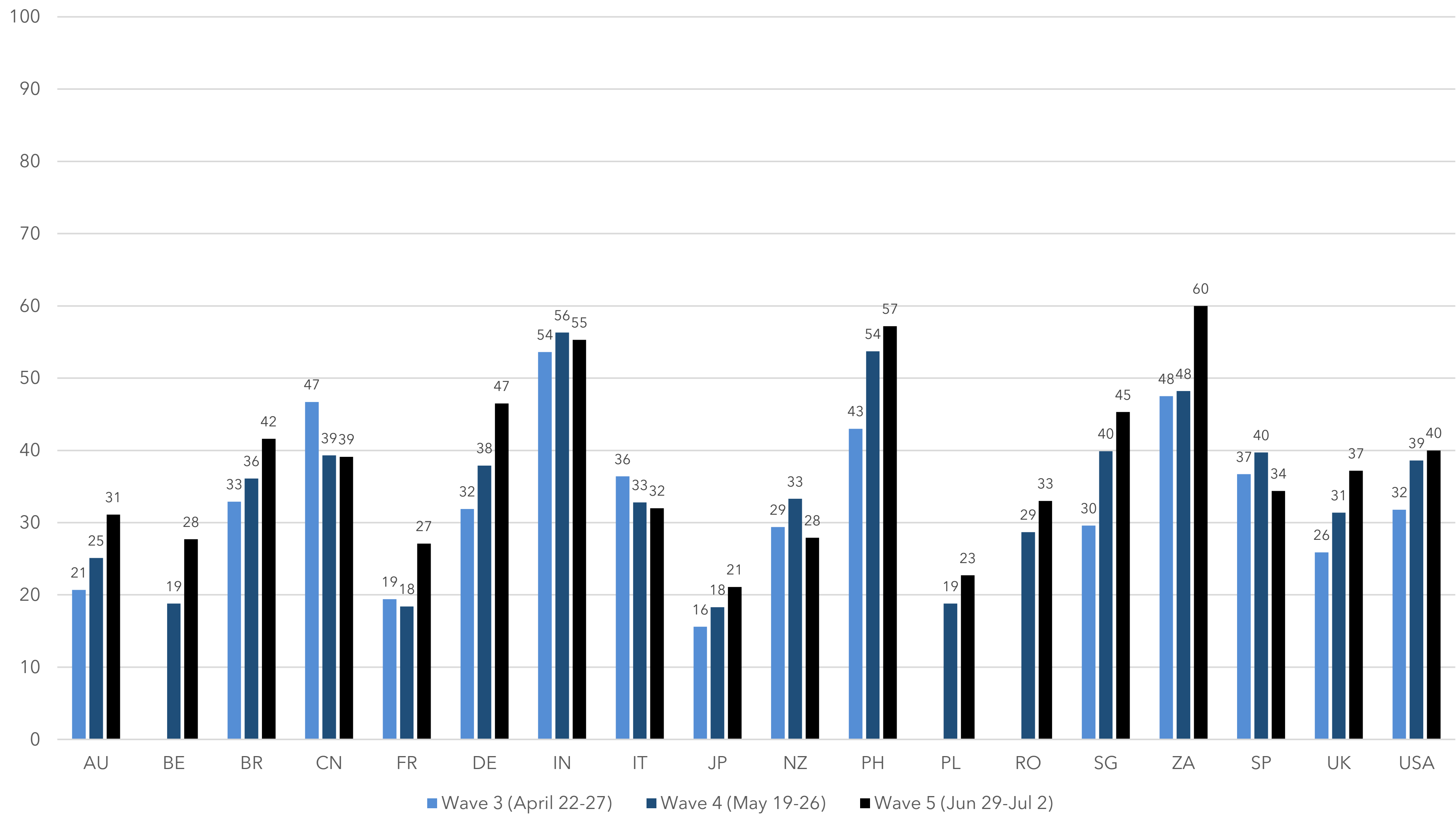
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Cancel a gym membership	12	12	10	5	10	12	14	11
Eat out at restaurants less often	42	41	44	38	42	42	42	42
Eat at fast-food outlets less often	39	31	28	21	31	31	33	33
Visit bars / pubs less often	25	34	31	24	28	34	37	26
Visit the cinema less often	44	38	37	28	38	38	41	34
None of these	22	29	36	49	30	32	28	33

Question: After the outbreak is over, do you think you'll do any of the following? "Visiting bars / pubs less often" was shown to those 18+, or 21+ in the U.S.

Eating Out at Restaurants Less Often – Trended Data

% who expect to eat out at restaurants less often after the outbreak is over



Question: After the outbreak is over, do you think you'll do any of the following? Eat out at restaurants less often

Post-Outbreak Behavior Increases

% who say they expect to do the following after the outbreak is over

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Exercise at home more frequently	43	30	18	38	50	23	20	57	28	14	21	60	30	29	30	50	29	30	31
Shop online more frequently	49	29	28	53	55	28	31	59	36	23	30	50	46	44	44	55	36	38	36
Use food delivery services more frequently (e.g. Uber Eats, Just Eat, Deliveroo, etc)	22	11	8	38	18	8	9	40	13	6	8	36	12	15	25	38	14	15	12
Use mobile payment services more frequently	41	15	18	37	51	10	19	59	13	3	14	55	33	36	34	46	19	17	16
Use video calling more frequently (e.g. FaceTime, WhatsApp video, etc)	35	20	18	37	39	16	20	52	26	4	21	36	18	25	30	47	30	28	19
Use video conferencing platforms more frequently (e.g. Zoom, Hangouts, etc)	27	19	12	27	24	11	16	46	14	8	24	36	13	17	30	34	18	21	23
Work from home more frequently	27	23	22	35	15	18	20	50	20	10	22	52	24	27	34	41	26	27	27
None of these	16	36	34	11	10	37	34	2	28	63	33	3	25	24	20	7	26	26	33

Question: After the outbreak is over, do you think you'll do any of the following?

Post-Outbreak Behavior Increases

% who say they expect to do the following after the outbreak is over*

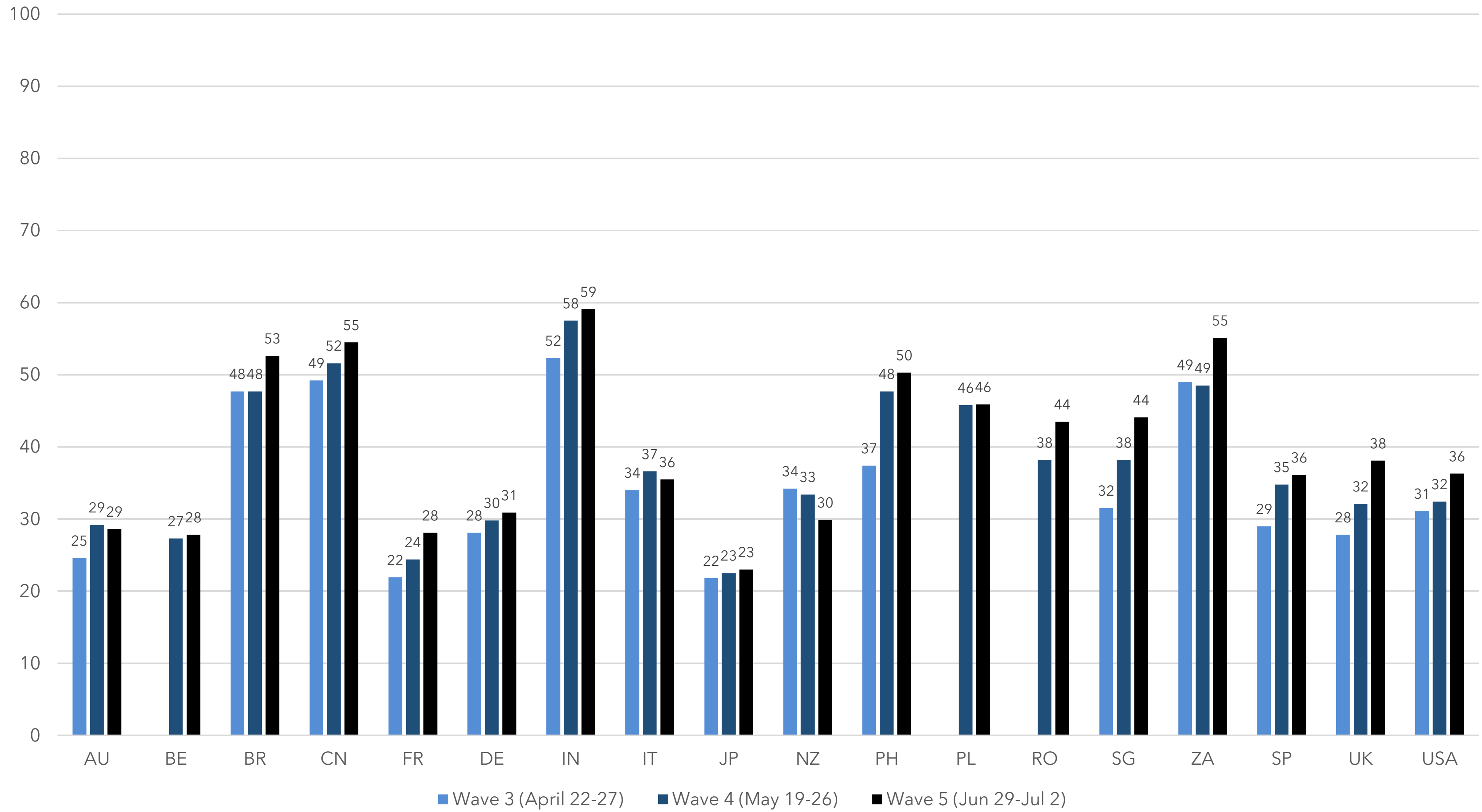
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Exercise at home more frequently	54	45	38	27	44	43	46	39
Shop online more frequently	51	50	49	36	47	50	54	43
Use food delivery services more frequently (e.g. Uber Eats, Just Eat, Deliveroo, etc)	31	25	15	9	20	24	25	18
Use mobile payment services more frequently	48	42	38	19	36	44	43	36
Use video calling more frequently (e.g. FaceTime, WhatsApp video, etc)	41	37	32	18	32	38	38	31
Use video conferencing platforms more frequently (e.g. Zoom, Hangouts, etc)	29	30	23	11	24	29	35	19
Work from home more frequently	31	28	25	18	25	28	33	25
None of these	7	14	21	39	16	16	11	20

Question: After the outbreak is over, do you think you'll do any of the following?

Increases in Online Shopping – Trended Data

% who say they expect to shop online more frequently after the outbreak is over



Question: After the outbreak is over, do you think you'll do any of the following? Shop online more frequently

Levels of Interest – Enrolling in Online Learning

% who say they have the following levels of interest in enrolling in online learning courses

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Extremely interested	23	12	11	35	16	12	8	49	15	6	13	38	8	18	18	37	23	10	10
Very interested	28	21	17	31	33	17	19	32	33	13	21	22	21	26	32	30	27	18	16
A little interested	24	25	23	17	31	17	24	11	24	20	30	24	30	27	32	17	21	26	25
Not very interested	11	12	17	8	11	10	15	5	12	22	13	11	21	12	11	7	10	13	14
Not at all interested	15	30	32	9	10	45	34	4	17	38	24	6	21	17	8	9	19	33	35

% who say they have the following levels of interest in enrolling in online learning courses*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Extremely interested	33	26	15	6	21	23	27	23
Very interested	31	32	23	12	28	28	29	26
A little interested	23	24	25	19	23	24	22	24
Not very interested	8	9	14	15	10	11	9	12
Not at all interested	6	10	23	48	17	14	13	16

Question: How interested are you in the following? Enrolling in online learning courses.

Levels of Interest – Working from Home Permanently

% who say they have the following levels of interest in working from home permanently (instead of attending a workplace / office)

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Extremely interested	25	20	17	34	17	19	17	40	21	16	20	48	22	23	27	43	28	24	27
Very interested	27	21	22	28	29	22	23	29	35	16	25	26	22	28	32	27	29	21	23
A little interested	21	18	15	19	26	15	18	13	19	24	23	19	22	22	21	15	16	18	18
Not very interested	15	12	15	9	21	10	12	12	9	17	11	6	16	13	12	8	8	13	9
Not at all interested	13	30	32	10	8	35	30	6	17	27	21	2	18	14	7	7	19	25	24

% who say they have the following levels of interest in working from home permanently (instead of attending a workplace / office)*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Extremely interested	30	27	22	13	26	25	26	28
Very interested	28	29	24	17	26	28	27	27
A little interested	17	21	22	19	21	21	20	19
Not very interested	15	14	16	11	15	14	17	13
Not at all interested	10	8	16	41	13	13	11	12

Question: How interested are you in the following? Working-from-home permanently (instead of attending a workplace / office).

Levels of Interest – Using Alternatives to Public Transport

% who say they have the following levels of interest in using alternatives to public transport

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Extremely interested	24	21	17	28	17	21	15	43	21	12	16	41	13	24	17	41	28	23	19
Very interested	31	24	19	29	36	23	24	34	39	16	21	27	27	35	34	30	30	24	20
A little interested	24	23	23	20	32	19	25	12	20	29	25	22	32	19	31	13	19	24	16
Not very interested	11	10	15	12	12	9	15	7	7	21	15	7	15	8	14	5	11	11	10
Not at all interested	11	22	26	12	3	29	20	4	12	22	23	3	13	14	5	12	13	17	35

% who say they have the following levels of interest in using alternatives to public transport*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Extremely interested	27	25	22	14	22	25	28	22
Very interested	35	33	27	19	30	32	32	31
A little interested	19	24	26	25	24	23	22	24
Not very interested	14	10	10	12	11	10	8	11
Not at all interested	5	8	15	30	13	9	10	13

Question: How interested are you in the following? Using alternatives to public transport.

Brand Responses to Black Lives Matter Movement

% who say brands should be doing the following in response to the Black Lives Matter movement

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Asking for feedback from customers	37	31	22	46	32	22	27	49	33	20	33	48	37	31	27	46	34	32	38
Asking for feedback from employees	39	32	21	45	36	21	32	46	33	23	40	53	34	35	33	50	35	37	40
Ensuring diversity in leadership / management teams	44	37	31	57	44	32	33	48	39	21	44	52	30	35	44	59	43	43	46
Ensuring diversity in their mix of suppliers	39	35	28	55	38	31	29	42	32	18	36	46	32	33	38	55	34	38	41
Making charitable donations	40	31	21	50	40	26	34	47	32	20	29	55	33	32	32	51	33	31	36
Reviewing hiring policies	39	34	33	53	31	33	35	46	37	22	37	52	36	41	47	54	42	40	47
Showing support via social media	47	33	24	56	50	24	30	59	39	25	32	65	31	31	33	57	38	29	34
Supporting local / national community initiatives	50	41	28	62	53	36	32	55	46	32	43	61	44	41	43	57	47	40	44
None of these	16	38	40	10	10	35	30	5	20	43	32	6	26	30	17	14	22	35	32

Question: Which of these, if any, do you think brands / companies should be doing to support the Black Lives Matter movement?

Brand Responses to Black Lives Matter Movement

% who say brands should be doing the following in response to the Black Lives Matter movement*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Asking for feedback from customers	44	38	31	29	37	37	38	36
Asking for feedback from employees	46	39	34	34	41	37	40	37
Ensuring diversity in leadership / management teams	53	44	41	39	48	41	48	40
Ensuring diversity in their mix of suppliers	42	41	36	33	41	38	43	35
Making charitable donations	47	41	36	30	42	38	42	38
Reviewing hiring policies	42	40	35	39	40	37	42	35
Showing support via social media	57	48	42	33	49	46	48	45
Supporting local / national community initiatives	55	50	49	44	52	49	51	47
None of these	6	13	22	34	14	17	13	17

Question: Which of these, if any, do you think brands / companies should be doing to support the Black Lives Matter movement?

Importance of Black Lives Matter Movement

% who say that tackling racism has become a more important issue to them following the Black Lives Matter movement

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Yes	44	16	11	34	65	15	18	46	23	14	16	46	12	9	30	31	23	18	19
No	19	43	41	12	13	39	36	12	17	29	34	9	31	49	27	17	15	41	40
It was already important to me	25	33	34	48	10	31	38	30	51	22	43	31	39	23	24	46	58	33	34
Not sure	12	9	14	6	11	15	8	13	9	35	7	15	18	20	19	7	5	8	7

% who say that tackling racism has become a more important issue to them following the Black Lives Matter movement*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Yes	47	49	40	18	46	43	48	42
No	13	19	22	32	16	22	20	19
It was already important to me	29	22	25	35	27	23	25	24
Not sure	11	10	13	15	11	12	7	16

Question: Has the Black Lives Matter movement made tackling racism a more important issue for you?

Changing Importance: Companies Behaving More Sustainably

% who say that companies behaving more sustainably has taken on the following importance because of coronavirus

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
A lot more important	39	22	19	55	37	22	16	60	38	24	23	63	23	25	25	44	28	23	21
A little more important	33	29	30	24	41	34	32	27	25	24	30	24	31	19	39	28	35	32	25
No change	23	45	43	16	20	40	43	5	29	42	41	9	40	43	29	21	32	41	48
A little less important	3	3	5	3	2	3	5	5	6	3	5	2	4	9	5	4	4	2	3
A lot less important	2	2	4	2	0	2	4	2	3	6	2	2	2	4	3	3	1	3	3

% who say that companies behaving more sustainably has taken on the following importance because of coronavirus*

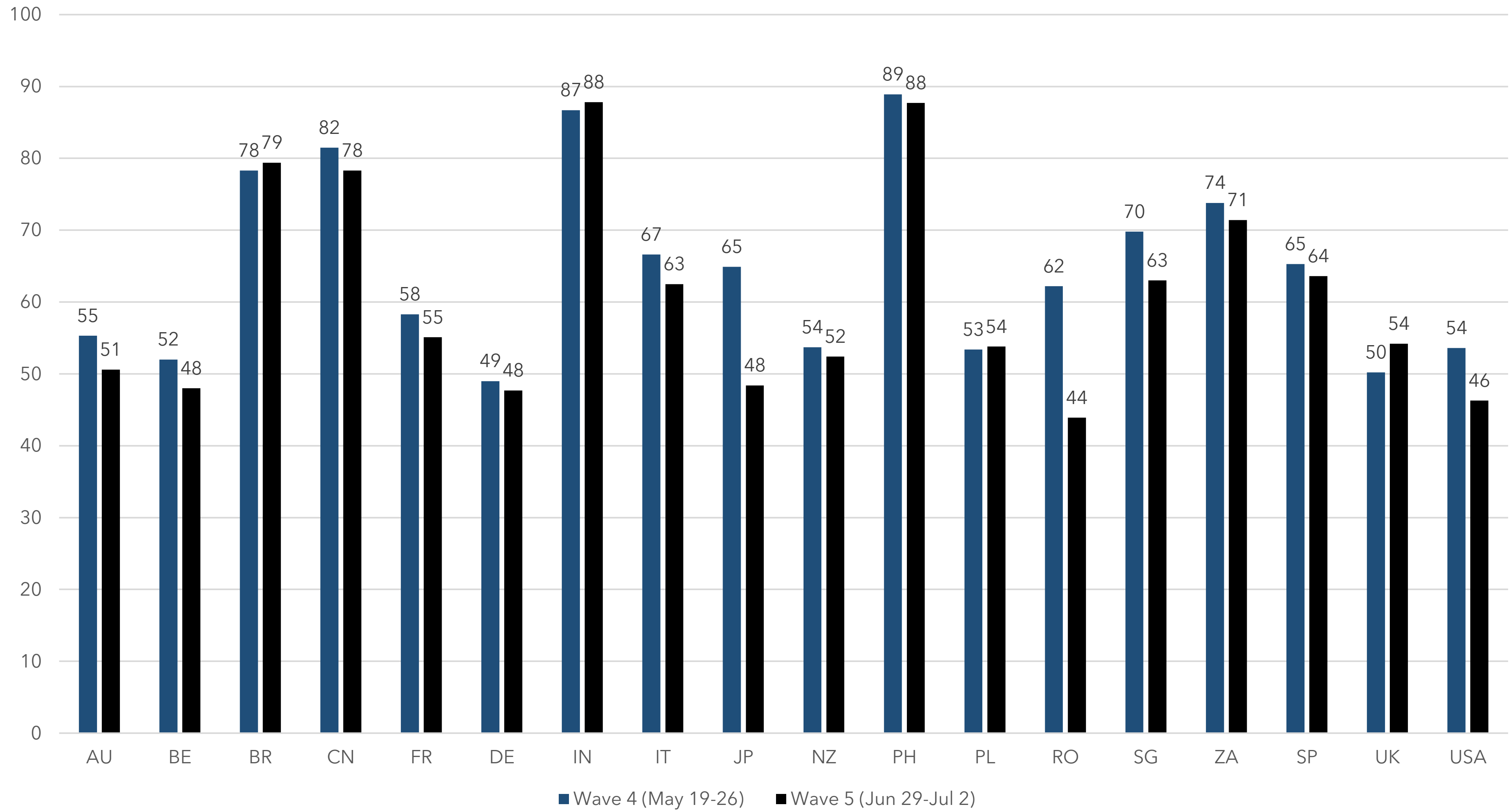
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
A lot more important	47	39	37	27	39	40	48	33
A little more important	32	35	31	23	32	33	30	34
No change	15	21	29	46	25	22	18	27
A little less important	4	3	2	2	2	4	3	4
A lot less important	2	2	2	2	2	2	1	3

Question: Has the importance of any of these things changed for you, because of coronavirus? Companies behaving in more sustainable / eco-friendly ways

Companies Behaving More Sustainably – Trended Data

% who say that companies behaving more sustainably is a lot or a little more important because of coronavirus



Question: Has the importance of any of these things changed for you, because of coronavirus? Companies behaving in more sustainable / eco-friendly ways. Chart illustrates combined responses for A lot more important, A little more important

Changing Importance: Reducing Carbon Footprint / Environmental Impact

% who say that reducing their carbon footprint / impact on the environment has taken on the following importance because of coronavirus

	All	AU	BE	BR	CN	FR	DE	IN	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
A lot more important	39	23	19	50	38	21	17	62	48	19	23	59	24	33	29	45	29	21	21
A little more important	32	24	31	26	42	31	27	24	20	27	27	26	28	22	34	28	33	28	23
No change	23	46	41	17	17	38	45	6	25	43	42	10	40	33	28	22	31	44	50
A little less important	4	4	5	4	3	6	7	7	4	5	4	4	5	7	6	3	6	4	4
A lot less important	2	3	4	2	1	5	5	2	3	6	4	2	2	5	3	3	2	3	3

% who say that reducing their carbon footprint / impact on the environment has taken on the following importance because of coronavirus*

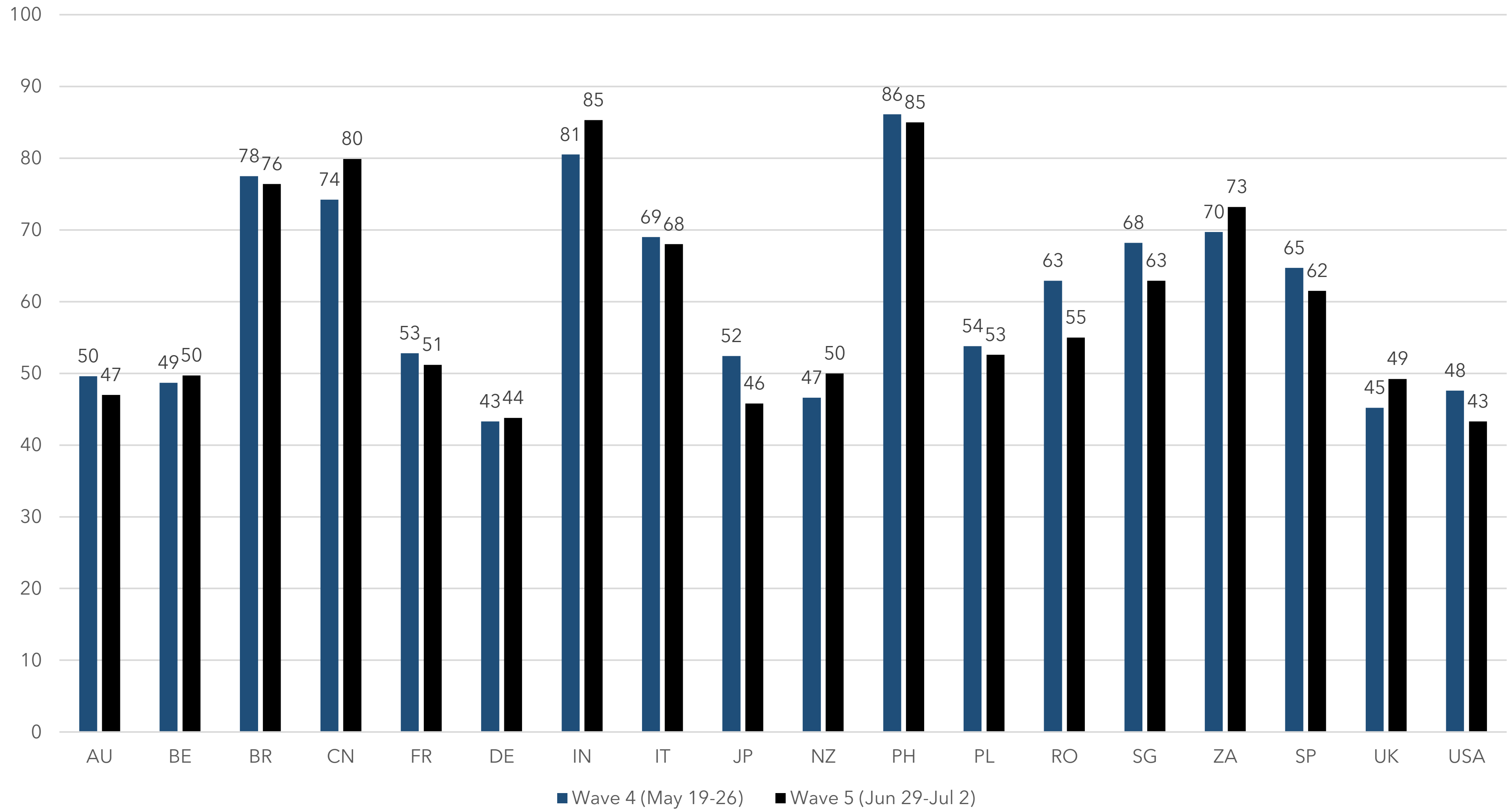
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
A lot more important	47	40	35	28	39	40	45	33
A little more important	32	33	31	25	32	32	30	34
No change	14	20	29	43	24	21	18	24
A little less important	6	4	3	2	4	4	5	6
A lot less important	2	2	2	2	2	3	2	3

Question: Has the importance of any of these things changed for you, because of coronavirus? Reducing my carbon footprint / impact on the environment

Reducing Carbon Footprint – Trended Data

% who say that reducing their carbon footprint / impact on the environment is a lot or little more important because of coronavirus



Question: Has the importance of any of these things changed for you, because of coronavirus? Reducing my carbon footprint / impact on the environment. Chart illustrates combined responses for A lot more important, A little more important

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