GWI

Coronavirus Research | March 2020

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Introduction

Coronavirus is on all of our minds, screens and feeds – and for good reason.

The outbreak is causing fluid and unpredictable changes to our day-to-day lives, and businesses everywhere are understandably worried about the impact it will have on them.

At GlobalWebIndex, we want to help keep you clued into what's happening across the consumer landscape: how people are reacting, how behaviors are shifting, where they're turning, and what this means for businesses of every kind.

That's why we're releasing this first dataset, collected between March 5-12 in the U.S. and UK. We'll be following this with further releases, exploring the impact of Coronavirus on particular sectors and on consumer behaviors more generally, as well as keeping track of how sentiments and concerns are shifting.

NOTE: All stats in this report are from a GlobalWebIndex March 2020 custom survey among 2,310 (U.S.) and 2,229 (UK) internet users aged 16-64.

Audience Definitions:

Generations:

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

Income (based on annual household income):

- **Lower income (U.S.) – $32,000 or less**
- **Higher income (U.S.) – $85,000 or more**

- **Lower income (UK) – £24,000 or less**
- **Higher income (UK) – £60,000 or more**

Consumer Concerns

In general, **concerns about other people outweigh those surrounding personal exposure to the virus**. Topping the list are the progress of the virus, the lack of a vaccine and the chances of friends, family or high-risk groups being infected – all of these come ahead of the fear of catching it personally.

Concerns over the risk of the virus to the elderly increase directly in line with age. Surprisingly, concerns over catching the virus individually *decrease* in line with age, despite younger people supposedly being less at risk.

Fears around the rapid spread of the virus are most pronounced in the U.S., whereas in the UK the primary concern is the risk of the virus on vulnerable individuals such as the elderly.

Currently, **only 20% are concerned about the impact it will have on their personal finances (dropping to 12% among Gen Zs).** Interestingly, it's also one of the areas of concern where there's minimal difference between high vs lower income groups (just 5 percentage points); that suggests that consumers in all income brackets haven't yet begun considering the longer-term impact on their family finances, and are still more focused on the immediate spread.

Concerns over the ability of medical providers to do sufficient testing of people who might be sick are much higher in the U.S. (34%) compared to the UK (23%), and are also much more pronounced among older people.

	All	U.S.	UK	Gen Z	Gen Y	Gen X	Boomers	Lower Inc	Higher Inc
The speed at which the virus is spreading	54	55	45	52	51	58	51	56	52
My family / friends catching the virus	53	52	56	52	52	55	51	53	38
Risks to the elderly / people who are already sick	49	47	56	42	44	52	60	47	42
Not having a vaccine available yet	47	48	38	52	41	51	42	50	45
Myself catching the virus	45	45	41	51	46	41	42	46	33
Hospitals not being properly equipped to manage / control the virus	43	44	40	42	42	45	45	45	30
Inaccurate information about the virus	40	40	37	37	38	44	34	38	37
The lack of research / unknowns surrounding the virus	35	36	31	32	36	35	35	35	29
Failure of medical providers to do sufficient testing of people who might be sick	32	34	23	29	30	35	33	31	27
Shortages of medical supplies (e.g. face masks)	32	33	23	27	33	33	31	30	25
Risks to healthcare professionals	30	31	27	22	28	36	29	30	33
Countries not being able to work together to fight the virus	28	29	23	28	28	28	24	26	24
The impact it might have on my personal finances	20	20	19	12	25	20	20	15	20
Other	6	7	4	6	7	6	5	10	3
I'm not worried about anything right now	6	6	8	3	3	8	12	8	3

Question: When thinking about COVID-19 / coronavirus, which of the following, if any, are you most worried about? Please select all that apply.

Knowledge Levels

When we ask consumers to identify fact from fiction in terms of Coronavirus, boomers are the most likely to know how to minimize the risks of infection (e.g. by avoiding touching their eyes, noses or mouths with unwashed hands).

Boomers are also the least likely to select any of the urban myths that have been circulating in some corners – as an example, Gen Zs are almost 60% more likely than boomers to believe in urban myths around the virus.

	All	U.S.	UK	Gen Z	Gen Y	Gen X	Boomers	Lower Inc	Higher Inc
The virus can spread to people of any age	73	72	80	65	69	79	79	71	70
Washing your hands frequently / using hand sanitizer is a recommended precaution to keep healthy	72	69	84	61	64	79	84	69	72
People of any race / ethnicity can catch the virus	71	69	78	58	67	77	81	68	67
Avoiding touching your eyes, nose, and mouth with unwashed hands is a recommended precaution to keep healthy	70	69	76	63	65	75	79	66	70
The new coronavirus causes symptoms similar to the cold and flu e.g. high fever, cough	68	66	80	59	65	73	76	62	68
It's possible to catch the infection from someone who doesn't feel unwell	54	53	59	42	56	57	58	52	59
The new coronavirus is more dangerous than the winter flu	43	44	38	34	45	46	44	41	48
Most people recover from the disease without needing special treatment	37	32	63	22	41	39	38	29	38
Taking traditional herbal medicines are not effective against the virus	27	26	29	30	26	27	23	23	37
*The virus can be caught from packages / parcels**	16	17	14	14	20	14	18	14	16
Thoroughly cooking meat and eggs is recommended to prevent infection spread	14	14	9	14	20	10	6	10	13
*Spraying alcohol or chlorine on your body can kill the new coronavirus**	11	10	11	6	16	8	10	7	10
*If I wear a face mask, I definitely won't catch the virus**	9	11	2	13	12	9	0	7	19
*Antibiotics can help prevent and treat the new coronavirus**	9	10	4	7	13	8	5	7	9
*Regularly rinsing your nose with saline can prevent infection**	8	9	3	5	16	6	1	7	8
*Vaccines against pneumonia can protect against the new coronavirus**	8	9	3	5	13	5	4	5	9
*Hand dryers effectively kill the virus**	7	8	3	7	13	4	2	5	7
*Eating garlic can help protect people against the new coronavirus**	5	5	2	2	10	3	2	2	7
Other	6	6	2	3	7	6	6	9	3
None of the above is true	4	4	5	3	3	5	8	5	4

Question: Which of the following, if any, do you believe to be true about COVID-19 / coronavirus? **Options in italic and marked with * are untrue**

Attitudes towards information on staying healthy

If asked whether they have enough information about the recommended precautions to take to stay healthy, we found that 50% believe they do, 29% believe they need more, and 21% aren't sure.

This masks some important differences. **Younger age groups, particularly Gen Zs, believe they don't currently have enough** and that they need more, whereas older groups are much more likely to believe they have enough information.

UK consumers (60%) are notably more confident than those in the U.S. (48%) to believe they have enough information on the topic.

Income also plays a major role; **lower income groups are much more likely than higher earners to be in need of more information**.

The group who believe urban myths to be true are also fairly open about their limited understanding, as they're more likely to say they need more information on the topic.

	All	U.S.	UK	Gen Z	Gen Y	Gen X	Boomers	Lower Inc	Higher Inc
Yes, I have enough information	50	48	60	41	52	52	56	41	65
No, I don't have enough information	29	30	22	41	31	23	22	33	23
I'm not sure	21	22	17	18	17	26	22	26	12

Question: Do you feel you have enough information about the recommended precautions to take to stay healthy?

Trust in information on infection and mortality rates

A major concern in both the UK and U.S. is around **inaccurate information about the virus - 40% say they're concerned about this**. These concerns are shared fairly evenly between age, country and income levels.

Despite this, there are strong levels of trust in the reported figures shared so far about infection / mortality rates overall. Almost half in the UK and U.S. do trust these reported figures.

The rate of those who say they do not trust the reported figures is significantly lower (at 15% in both countries). For the most part, many are unsure rather than lacking in trust.

Gen Z and baby boomers are more likely to say they're unsure about these reported figures rather than saying they trust them. Whereas millennials and Gen X are more likely to say they trust them.

	All	U.S.	UK	Gen Z	Gen Y	Gen X	Boomers	Lower Inc	Higher Inc
Do trust	45	46	42	36	58	41	37	34	62
Do not trust	12	12	15	8	10	17	14	12	10
Unsure	39	39	40	53	29	39	46	49	28
Haven't seen figures	3	4	3	4	3	4	3	5	1

Question: How much do you trust or not trust the reported figures that you see about infection / mortality rates?

Behavioral changes: day-to-day routines

Almost 90% of Gen Zs have made changes to their daily routine, dropping to 75% among baby boomers.

Nearly 30% of UK/U.S. consumers say they have avoided or reduced going to busy public places. 20% have avoided or reduced going to restaurants and just over 15% say they've cancelled or reduced trips to other countries.

Some **40% are reading the news more frequently** in order to stay up-to-date, compared to just over **25% checking social media more frequently**. Increased news checking is fairly consistent across generations, while checking social media more frequently drops dramatically among baby boomers.

Even among those who say they're not concerned at all, around 1 in 4 are washing their hands more frequently, and over 1 in 10 are reading the news more often to keep up-to-date. Those with limited understanding of the virus are more likely to be looking to social media to keep up with the latest developments on the virus compared to the average (35% are).

	All	U.S.	UK	Gen Z	Gen Y	Gen X	Boomers	Lower Inc	Higher Inc
Washing my hands more frequently	58	58	57	60	49	64	59	58	63
Read the news more often to keep up-to-date	40	39	40	40	37	44	32	34	46
Trying not to touch my face	36	37	31	42	29	37	41	34	33
Not directly touching public surfaces (e.g. door knobs, elevator buttons)	29	30	24	25	26	35	30	27	34
Avoided / reduced going to busy public places e.g. cinema	29	30	20	22	31	31	24	27	22
Checked social media more often to keep up-to-date	27	29	17	27	30	29	15	27	35
Washing my towels more frequently	21	22	13	25	20	21	13	23	16
Avoided / reduced eating out at restaurants	20	21	11	15	23	20	19	16	17
Changed my daily routines to avoid crowds / rush hour	18	19	11	10	20	21	16	17	15
Avoided / reduced travel to other destinations in my own country	18	20	10	12	22	19	13	15	13
I'm no longer considering booking trips to other countries	17	17	18	14	18	20	11	17	15
I've cancelled trips to other countries that I've already booked	14	16	7	5	21	17	2	9	24
Started wearing a face mask	11	13	3	15	13	12	0	11	21
Working from home more often	10	11	5	5	14	9	9	6	11
Changed the way I commute to work (e.g. avoided busy trains)	7	8	4	5	13	6	2	5	8
Other	5	5	2	7	3	4	5	6	3
I've not made any changes as a result of COVID-19 / coronavirus	18	16	25	12	15	20	25	21	9

Question: Which of the following changes, if any, have you made as a result of COVID-19 / coronavirus?

Behavioral changes: online buying decisions

A quarter say they're now shopping more online in light of the virus. Millennials (39%) are much more likely than any other generation to say this, followed by Gen Xers (29%). Higher income individuals are also significantly more likely than lower earners to say this (48% vs. 15%, respectively)

Those in the U.S. are more likely than their UK counterparts to be turning more to online shopping in light of the virus.

Even many of those who say they're worried about the impact of the virus on their personal finances say they're shopping more online in the wake of the spread of the virus (46% do).

	All	U.S.	UK	Gen Z	Gen Y	Gen X	Boomers	Lower Inc	Higher Inc
Strongly disagree	27	24	47	24	20	29	47	29	19
Somewhat disagree	13	13	15	13	11	15	12	14	13
Neutral	34	36	25	49	30	31	32	42	20
Somewhat agree	16	17	7	10	26	12	6	12	20
Strongly agree	10	11	5	4	13	12	4	3	29
Any agree	25	28	12	14	39	24	10	15	48
Any disagree	41	36	62	37	31	44	59	43	32

Question: "I'm shopping more often online (including grocery shopping and other goods) now than before, because of COVID-19 / coronavirus"

Attitudes towards preventative measures

When we asked consumers what steps they felt were necessary to manage the spread of the virus, **over half said that airlines should be reducing and cancelling flights to high-risk destinations**. This is particularly pronounced among older age groups who are less likely to travel frequently compared to younger ones.

However, the generation splits here are once again profound, with **boomers often having a 20-point lead over their Gen Z counterpart**s. The only reversal of this comes for closing all schools where, with a vested interest, Gen Z shoots into the lead.

Despite the fact that older age groups tend to be less likely in the UK and U.S. to say that they tend to work remotely, boomers are in fact the most likely to say that remote working is an effective measure to prevent further spread.

Those with **limited understanding of the virus are significantly more likely to believe in the effectiveness of drastic measures such as moving troops to support emergency services**, restricting transport and enacting powers to make people stay in quarantine. Those in the UK are more in favor of working remotely to contain the spread compared to the U.S. Those in the U.S. are slightly more in favor of closing international borders (36% vs. 31%, respectively).

	All	U.S.	UK	Gen Z	Gen Y	Gen X	Boomers	Lower Inc	Higher Inc
Airlines reducing / cancelling flights to high-risk destinations	53	53	54	46	48	57	65	56	44
Companies ensuring employees stay home if they feel unwell	52	51	60	42	48	56	65	49	52
Increasing hospital supplies	48	48	51	42	46	54	46	49	45
Quarantining areas of the population who are at high risk of spreading the virus	46	46	49	37	46	51	46	44	46
Cancelling public gatherings (e.g. live concerts, sports events, religious gatherings)	45	45	45	31	42	52	52	42	51
Closing big tourist attractions	37	38	35	37	37	39	34	40	28
Closing international borders	35	36	31	38	32	35	41	37	34
Companies making work from home mandatory where possible	32	31	36	28	34	31	39	31	26
Restricting the use of public transport	25	25	23	28	26	22	24	27	18
Relying more heavily on digital communication e.g. messaging apps, social media	23	23	26	22	24	22	25	22	21
Troops supporting the emergency services	22	22	26	17	25	25	18	25	17
Closing all schools	22	22	22	33	21	18	23	23	20
New legal powers to make people stay in quarantine	22	21	29	16	24	24	21	24	14
Re-employing recently retired medical staff	15	13	23	15	16	14	15	14	11
Other	8	8	4	8	7	8	7	11	3
None of the above	6	6	8	4	4	8	10	7	6

Question: Which of the following, if any, do you think is a necessary step to manage the spread of the virus?

Attitudes towards responsibility for managing spread

Above all, consumers in both countries **hold the government and individuals to account for managing the spread of the virus**. Interestingly, those in the U.S. choose the government above all, whereas in the UK consumers put the onus on individuals above all else.

Researchers and scientists are also feeling the pressure - around half of UK/U.S. consumers believe they should take the responsibility for this. Considering that almost half say that the lack of vaccines and over a third say the lack of research / unknowns surrounding the virus are major concerns, this is to be expected.

Employers should also be very vocal in this space; more than 40% of consumers in both countries believe that employers have a responsibility in this respect. This is most pronounced among older age groups and higher income earners.

Consumers are as likely to believe employers are responsible as they to believe corporations are responsible.

	All	U.S.	UK	Gen Z	Gen Y	Gen X	Boomers	Lower Inc	Higher Inc
The government	68	68	70	71	68	70	60	70	71
The individual	66	64	76	46	67	74	69	62	69
Researchers / scientists	53	55	46	58	51	56	48	63	53
Employers / workplace	42	41	51	30	40	50	44	39	56
Corporations (e.g. airlines)	42	41	47	40	41	43	40	45	42
Other	13	14	11	17	13	11	15	19	8
None of the above	4	4	5	5	2	5	5	5	3

Question: Who do you believe is responsible for managing the spread of the virus?

Workplace policy

Among those who believe employers are responsible for managing the spread, around a third say that relying more heavily on digital communication such as messaging apps / social media is an effective preventative measure (making them 43% more likely than average to say this). They're also much more likely to say that companies making work from home mandatory where possible is an effective measure (almost half do).

Changes to work routines are most pronounced among males and millennials. Currently, millennials are the most likely to report altering the way they commute, as well as increased levels of remote working.

In terms of changes enacted by companies, employees report the most common measures being the **provision of sanitization products, as well as more regular communications and more frequent office cleaning**.

Only 10% currently say that work-from-home is being encouraged. Some **16% they've seen no changes at all, with business carrying on as usual**. As government-implemented restrictions increase over the coming days, we would expect these last two measures to change the most dramatically.

Lower income earners are more likely than higher earners (17% vs. 11%) to say that their employer has not done anything in this respect. In fact, the biggest disparities between higher and lower earners are for the ability to work from home, committing to paying employees in the event of self-isolation, enacting official plans to make sure employees are safe, and offering sanitization products.

	All	U.S.	UK	Gen Z	Gen Y	Gen X	Boomers	Lower Inc	Higher Inc
They're offering sanitization products e.g. hand sanitizers, wipes	26	26	24	19	29	32	9	18	44
They're providing regular communications about the virus	23	24	19	16	31	25	9	15	35
They're cleaning the offices more regularly	20	21	12	17	28	20	3	14	24
They're frequently communicating possible measures which might be taken in the short term	17	17	15	12	23	17	6	10	23
They've cancelled / cut down on work-related travel	16	18	7	12	21	20	3	11	24
They've created an official plan to help employees stay safe	13	13	11	6	20	12	6	7	19
They're encouraging employees to work from home	10	11	7	8	18	7	4	5	13
They're committed to paying employees if they have to self-isolate rather than just the minimum pay	7	7	7	5	13	5	0	3	10
They've made working from home mandatory for everyone	6	7	2	5	11	4	3	3	9
Other	2	2	3	3	1	3	2	2	2
They've not done anything, it's business as usual	16	15	21	12	18	14	20	17	11
I don't work for a company / I'm not in an office so I can't say	37	37	37	48	22	38	60	53	14

Question: How is your workplace managing COVID-19 / coronavirus?

Economic confidence

Over half of consumers in the U.S. and UK think a global recession is now likely. A further 1 in 3 are unsure, leaving fewer than 1 in 10 who think a recession is unlikely. This sentiment is shared equally in both the UK and U.S.

Once again, audience-differences are dramatic here. From an age perspective, Gen Zs are more likely to be in the "uncertain" group. **High-income groups are twice as likely as lower income ones to think a recession is extremely likely**, and men are ahead of women.

The impact that this could have on spending decisions is clear, and we'll be examining this in more detail in further upcoming research.

Those who say they are concerned about the impact of the virus on their personal finances are 61% more likely than average to believe a global recession is extremely likely in light of the virus (26% do). Overall, 67% of this group believe a global recession is now likely.

	All	U.S.	UK	Gen Z	Gen Y	Gen X	Boomers	Lower Inc	Higher Inc
Extremely unlikely	3	3	3	2	2	4	3	3	2
Unlikely	7	7	9	8	6	9	7	8	8
Likely	37	37	38	38	45	33	30	31	49
Extremely likely	16	16	14	7	19	17	18	12	24
I'm not sure	36	37	36	45	28	38	42	46	18

Question: How likely do you think a global recession is, as a result of COVID-19 / coronavirus?

Digital health appointments

Digital / virtual health appointments have been suggested as one way to deliver health assistance while minimizing the spread of the virus. **There's considerable consumer support for this, with 6 in 10 U.S. and UK consumers believing both that they are effective, and that they would consider using them**.

Belief that digital health appointments are effective remains consistent across geography, age and income, but peaks among higher income groups.

However, while only **about 15% of people say they're definitely *not* open to them, this rises to over 25% among boomers**. Older consumers will therefore need the most convincing and reassurance over their efficacy.

	All	U.S.	UK	Gen Z	Gen Y	Gen X	Boomers	Lower Inc	Higher Inc
Very ineffective	4	4	4	4	2	5	5	4	2
Somewhat ineffective	10	10	10	15	7	10	12	10	9
Somewhat effective	39	38	45	29	48	38	36	37	43
Very effective	21	22	16	29	20	19	17	20	30
I'm not sure how I feel	26	26	25	23	23	29	30	29	16
Any Effective	60	60	60	58	67	57	53	57	73
Any Not effective	14	14	15	19	10	14	16	14	11

Question: How effective do you think digital health appointments would be in helping to manage the spread of the virus?

	All	U.S.	UK	Gen Z	Gen Y	Gen X	Boomers	Lower Inc	Higher Inc
I already use a digital health service that allows me to speak to a doctor	12	14	5	15	19	9	3	8	20
I would definitely consider using it if it was available	48	46	58	46	51	48	41	48	47
I'm not sure	22	22	21	21	17	25	29	24	16
I wouldn't use it, I still prefer personal face-to-face appointments	15	15	13	16	11	14	25	16	15
I wouldn't use it, I don't trust the usefulness of telehealth services	3	3	4	2	2	5	3	3	2

Question: To what extent would you consider using a digital health service instead of visiting your doctor in person?

Benefits of digital health appointments

Among those who currently use/would consider using digital health appointments, the majority believe the biggest benefits are the **reduced risk of passing on and catching infections, and reducing the risk of infecting medical staff**.

Those in the UK are much more likely to say that reducing the burden on medical professionals is an important benefit of digital health appointments. This is also a sentiment which is most evident among millennials.

	All	U.S.	UK	Gen Z	Gen Y	Gen X	Boomers	Lower Inc	Higher Inc
Reduces risk of catching infections	42	41	49	38	42	45	38	39	46
Reduces risk of passing on infections to other patients	43	41	50	38	44	46	37	39	48
Reduces risk of passing on infections to healthcare staff	42	40	48	36	42	45	39	37	51
It reduces the burden on medical professionals / hospitals	27	25	38	24	31	27	24	25	24
It helps me get an appointment more quickly / saves me waiting	30	30	33	30	37	28	21	26	32
If people are unwell, it helps them to still be able to see a doctor	34	33	45	28	35	36	37	33	31
It reduces healthcare costs	26	25	29	22	31	26	17	24	25
It's more accessible to speak with a doctor if people live in more remote locations	32	31	40	29	35	32	28	29	31
It speeds up diagnosis	20	19	24	19	24	19	10	20	20
It offers reassurance for people who might need to self-isolate	31	29	42	27	36	30	29	29	27
Other	3	4	1	3	5	2	1	5	2
None of the above	0.2	0.2	0.2	0.1	0.2	0.2	0.5	0.1	0.0

Question: Which of the following do you think are the biggest benefits of a digital health service given the current situation?

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