GWI

Coronavirus Research | May 2020

Multi-market research wave 4

Contents

Introduction

As restrictions continue to ease in many parts of the world and more countries enter a recovery phase, this fourth multi-market release examines how consumer sentiment is being impacted. Are we seeing growing levels of optimism and hope? Are consumers still planning on cutting back their spending or permanently changing their behaviors? And what – if anything – has shifted in relation to themes prominent before the outbreak, such as increased sustainability?

Fielded in 20 countries between May 19 - 26, our fourth research wave takes the pulse in Australia, Belgium, Brazil, Canada, China, France, Germany, India, Ireland, 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 in more detail what the "New Normal" could look like.

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 17,143 internet users aged 16-64. By country, it includes the following sample sizes: 1,053 (Australia), 544 (Belgium), 1,041 (Brazil), 770 (Canada), 1,050 (China), 1,033 (France), 1,062 (Germany), 1,072 (India), 532 (Ireland), 1,069 (Italy), 788 (Japan), 554 (New Zealand), 764 (Philippines), 559 (Poland), 534 (Romania), 770 (Singapore), 531 (South Africa), 1,086 (Spain), 1,068 (UK) and 1,263 (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. Again, 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 fourth 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.); Wave 2 which was fielded in 17 countries (the same 13, plus Canada, India, Ireland, and New Zealand) between March 31 – April 2; and Wave 3 (which was fielded in the same 17 countries as Wave 2, between April 22 – 27).

About half of the questions included in Wave 4 were also included in Waves 1, 2, and/or 3; 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 20 markets
AU	Australia
BE	Belgium
BR	Brazil
CA	Canada
CN	China
FR	France
DE	Germany
IN	India
IR	Ireland
IT	Italy
JP	Japan
NZ	New Zealand
PH	Philippines
PL	Poland
RO	Romania
SG	Singapore
ZA	South Africa
SP	Spain
UK	United Kingdom
USA	U.S.

Key Insights

Levels of concern are dropping in almost all markets

- Since April, concern about the coronavirus situation in one's own country has fallen almost everywhere. The most notable declines are in Australia (-13 points), Canada (-13 points), China (-10 points), and New Zealand (-13 points), indicating that a country's perceived success in handling the outbreak and moving further along the "recovery" journey is a strong influencer over consumer sentiment.
- Notable falls in concern were also seen in some of the European countries which were hit the hardest, including Italy (-8 points), France (-6 points) and the UK (-5 points). The sense that these markets are over the worst and moving to recovery will be influencing this, although it's worth noting that overall levels of concern still remain high (at around 75% or more).
- The only country to see an increase in concern since April is Brazil. Some 92% there express concern about their national situation, giving further evidence that Latin America could become the new "epicenter" for the virus.

Expected length of disruption is growing – and quickly

- In almost every single country where we have trended data, more people now expect the coronavirus outbreak in their country to take 6 months or longer to overcome. This is true even in markets which are furthest along the perceived recovery path – such as China (+6 points since April), Australia (+9 points), and New Zealand (+3 points).
- Nevertheless, some of the biggest increases have been in the European countries hit particularly badly. In Spain and the UK, there's been an 18-point rise in the numbers expecting it to take 6 months or more (climbing to 70% and 74% respectively); in France it's risen by 10 points to 66%, and in Italy it's up 8 points to 65%. It's a similar picture in the U.S. where the figure is up 16 points to 68%. This is a clear sign that consumers are beginning to understand the long-game nature of the outbreak, and that while levels of concern in badly-hit countries might be dropping, there's greater realization that disruption periods will be longer.
- In several countries, 90% or more of the population now expect the **global** situation to take 6 months or longer to resolve (Australia, Japan, New Zealand, Philippines, Singapore, South Africa). That many of these markets are in APAC suggests that consumers in this region feel like the rest of the world will be playing "catch up" with the progress they are perceived to have made.

Optimism about the global outlook is decreasing

- In most countries, optimism about overcoming the *national* situation remains largely unchanged since April. Brazil is a notable exception, where an 8-point decrease to 24% reflects the country's surge in cases. There have been small upticks in optimism in places like Germany and New Zealand.
- When asked about the *global* situation, optimism has decreased notably in many countries, including Australia, India, Italy, the Philippines, South Africa, and the UK. With those countries being at a range of different stages in terms of their respective coronavirus journeys, it's clear that optimism about the global outlook can deteriorate regardless of domestic situations.
- Tellingly, 15 of the 20 countries surveyed feel more optimistic about their own country's outlook than the global one – the only exceptions to this being Brazil, the Philippines, Poland, Romania, and South Africa.

Boom in those looking for staycations and domestic vacations

- Vacations continue to be the purchase that consumers are most likely to have delayed; globally, 51% say they have done this, hitting 60% or more in markets like China and Romania. By income, we also see a peak among the wealthiest group (58%).
- When asked what type(s) of vacation people intend to take in the next 12 months, domestic vacations (49%) and staycations in the local area (30%) top the list, scoring considerably more than short-haul foreign vacations (12%) or long-haul ones (9%). Local staycations have particular appeal in China and Japan, while domestic vacations score very strongly in Australia, New Zealand, Poland, Spain and China.
- In many European countries, there's a notable above-average desire for short-haul foreign vacations; this reflects the geography of the region but will also be influenced by proposals for travel "corridors" or safety "bubbles" between nearby countries.
- Overwhelmingly, it's a feeling of safety that people are looking for in their next vacation; nearly two thirds specify this as an important factor, vs half who want relaxation and a third who think price will be important.
- Globally, 28% aren't planning any vacation in the next 12 months – peaking at around 40% in Belgium, Canada, Japan and among lower income groups.

Sustainability more important than ever

- Many commentators have voiced concerns about whether the outbreak would reverse some of the pre-coronavirus momentum gained by climate campaigners. There have been questions about whether it would be possible to restore levels of enthusiasm / perceived importance, and whether some might have felt less compelled to reduce single-use plastic consumption after it played a vital role in some aspects of the coronavirus response.
- Currently, sentiment from consumers across 20 countries shows that sustainability is actually set to enjoy heightened attention and importance. Globally, almost 3 in 4 say it will be important that companies behave more sustainably, 2 in 3 think it will be more important than before to reduce their personal usage of single-use plastic, and 7 in 10 feel there will be heightened importance on reducing their personal carbon footprint / environmental impact.
- Of course, we might question whether expressed sentiment will always convert into actual behaviors, but three things are particularly important here. Firstly, across each of these three areas, less than 10% think they will be *less* important than previously. Secondly, figures are consistent across all major demographic groups. And third, we often see a much bigger gap between the responsibility that people place on companies vs what they are willing to undertake personally. Although there is still a discrepancy of this nature in these figures, that it is such a small one should offer encouragement.

There's widespread – and growing – approval of brands advertising as normal

- Across the 20 countries surveyed, only 12% of consumers disapprove of brands running "normal" advertising. That dips to as low as 6% in New Zealand.
- What's more, the numbers who either approve of, or have neutral views about, "normal" advertising have grown consistently since March and April. They hit 90% or more in Australia, Italy, New Zealand, Singapore, Spain, and the UK – showing that sentiment for a return to normality is particularly strong in some of the countries that are furthest ahead in their recovery or which are starting to emerge from particularly tough lockdowns. In New Zealand, the figures have increased from 75% in March, to 85% in April, to 94% in May.
- Conversely, we're seeing small but consistent decreases in approval for coronavirus-related advertising. Although overall approval for this still remains very high in all countries, the numbers have successively ticked down in over twelve of the seventeen countries where there is trended data available across March-April.

9 in 10 think it's important that brands and businesses get back to normal

- When asked about brands and businesses returning to normal (e.g. opening shops, running regular advertising, etc), it's 9 in 10 globally who think this is important. Figures peak in Italy and Romania, as well as among baby boomers and the higher income group.
- As a comparison, just over 6 in 10 think it's important that sports leagues / competitions resume, while around 8 in 10 place importance on cafes, bars and restaurants being able to reopen.
- In terms of the measures they want to see in public places, regular cleaning / disinfecting (68%), social distancing measures (58%) and provision of hand sanitizer (57%) are the biggest priorities for consumers. As might be expected, many of these safety-related measures are most important to baby boomers.
- Cashless payment options should see a boost; globally, about 40% say these will be important to them in public places, but here we see the opposite age trend at work: Gen Z (41%) and millennials (42%) are over 10 points ahead of boomers (30%) for this. The younger generations also have a notable lead for self-service payment options.

Expected speed of return to shops is boosted when countries enter recovery

- Across the 20 countries, just over half of consumers now say they will return to shops immediately, very quickly, or quite quickly. Since April, we've seen improvements in the figures across 14 of the 17 countries where we can trend the data.
- Generally, the figures are highest in countries which are furthest along the road to recovery. And it's these same places which have seen some of the biggest increases since April. For example, the figure now stands at 66% in Australia for people planning an immediate or quick return to shops (+5 points since April), 55% in China (+17 points), 59% in Germany (+10 points), and 61% in New Zealand (+13 points). Consumers in the UK remain adamant that they will have a quick return too (59%).
- Consumers remain much more reticent about returning to large indoor venues (25%) or large outdoor venues (28%). Clearly, people consider shops to be smaller and more manageable in terms of their safety concerns, and are yet to be convinced that similarly adequate measures could be put in place in larger venues where the crowds would be bigger.

8 in 10 are delaying big purchases, while 4 in 10 are looking to cut day-to-day spending

- When asked about their personal financial response to the coronavirus outbreak, over 90% are planning to change their behavior in some way. This reflects the fact that almost 85% of consumers expect the pandemic to have an impact on their personal finances, albeit with the largest amount anticipating only a small impact (44% say this, compared to 30% envisaging a big impact and 9% bracing for a dramatic impact).
- The most common response among consumers is to delay big-ticket purchases (80%), a behavior that peaks among Gen Z and, interestingly, the top income group. This is in line with trends we've seen elsewhere in our coronavirus research whereby wealthier segments are just as likely to be looking for money-saving opportunities and promotions, despite being in a more comfortable position.
- Gen Z are also the most likely to think they'll have to dip into their savings; close to half expect to have to do this, compared to just a fifth of boomers.
- Smaller expenditure is also under the spotlight for consumers; globally, 39% plan to cut back on their day-to-day spending, with 38% looking to reduce their regular financial commitments (e.g. cancel subscriptions, memberships, etc).

Out-of-home leisure behaviors are under scrutiny

- As concerns about safety in public spaces combine with a perceived need to reduce spending, many consumers expect to cut back on their out-of-home leisure moments. Globally, 40% think that after the outbreak is over they will eat out at restaurants less often, about a third plan to visit the cinema less often, and around 3 in 10 think they will visit fast-food outlets or bars/pubs less frequently.
- With many of the countries in question still in a stage of lockdown where leisure venues are closed, we might question whether these attitudes will soften as recoveries continue. Indeed, our research shows that – as levels of concern drop – so too does the consumer's desire to make changes to their "normal" behaviors. Hence, people concerned about the outbreak in their country are much more likely to plan cuts to their out-of-home leisure than those who are unconcerned, showing how we might expect these sentiments to evolve as levels of concern continue to recede. Nevertheless, the sentiment itself is still important, and shows the challenge that out-of-home leisure providers will need to face in terms of encouraging people back to venues.

Almost 1 in 2 plan to shop online more frequently after the outbreak

- In contrast to out-of-home leisure – where many consumers expect to make cuts – there are some behaviors boosted during the pandemic which could see continued engagement afterwards. Chief among these is online shopping, which 46% globally plan to do more of after the outbreak (up from 43% saying this in April). This peaks among Gen Z and the top income group.
- Other things that people expect to do more frequently include: in-home exercise (42%); using food delivery services (21%); using mobile payment services (37%); using video calling (32%); and using video conferencing platforms like Zoom (25%). All of these have remained stable or seen small increases since April, showing that enthusiasm to keep up with them isn't waning even as more countries move into the recovery phase.

Alcohol behaviors have diversified during the outbreak

- For the first time in this wave, we asked consumers how their alcohol consumption behaviors have changed during the outbreak. Across the 20 countries, 12% say they have drunk alcohol at times they wouldn't have done normally, while 14% feel that their overall consumption levels have increased. The UK (19%), Ireland (18%), the U.S. (17%), New Zealand (17%) and Brazil (17%) are the places where people are most likely to feel they have drunk more alcohol overall.
- New types and brands of alcohol have been discovered during the lockdown period. Some 12% say they've tried new brands, with a similar proportion reporting that they have tried new types. In both cases, the figures peak among millennials and the top income group.

Levels of Concern (Own Country)

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

	All	AU	BE	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Not at all concerned	8	6	5	1	4	16	4	8	2	4	3	3	11	1	5	5	1	2	2	4	6
A little concerned	25	33	31	7	25	43	22	38	4	14	23	17	40	3	38	20	14	8	14	16	15
Quite concerned	20	28	32	11	28	25	33	27	6	28	36	29	26	11	25	34	25	15	29	27	21
Very concerned	23	20	24	34	26	15	24	19	32	29	24	25	14	27	22	29	36	29	35	30	26
Extremely concerned	23	13	9	48	17	2	17	9	55	25	14	26	9	59	10	12	25	46	21	24	31

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

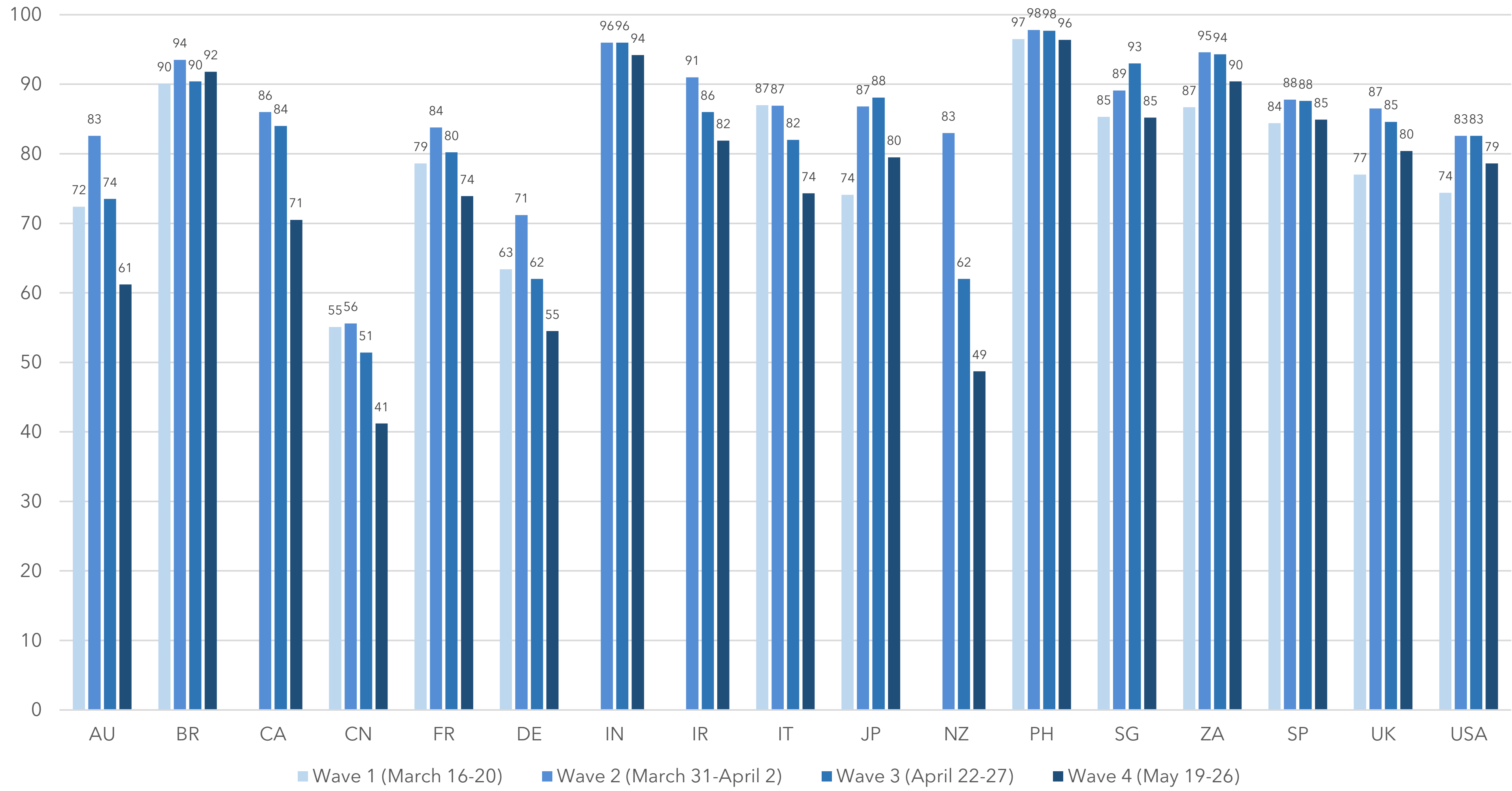
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Not at all concerned	6	9	9	6	7	10	8	10
A little concerned	20	26	26	19	26	24	22	23
Quite concerned	16	22	20	27	21	20	20	19
Very concerned	26	21	25	28	23	24	23	26
Extremely concerned	32	22	20	20	23	24	26	22

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	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Not at all concerned	3	4	3	2	4	3	4	5	1	3	3	2	2	0	5	5	0	1	1	5	5
A little concerned	11	11	26	7	17	11	19	22	4	11	17	11	12	3	31	19	6	8	13	14	16
Quite concerned	22	30	34	15	29	28	34	32	7	22	32	21	32	8	27	44	26	12	29	27	21
Very concerned	36	32	26	35	29	41	27	28	36	36	31	34	27	30	25	22	36	34	36	31	28
Extremely concerned	29	22	11	41	23	17	15	13	53	29	18	32	27	60	13	10	32	45	20	23	30

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

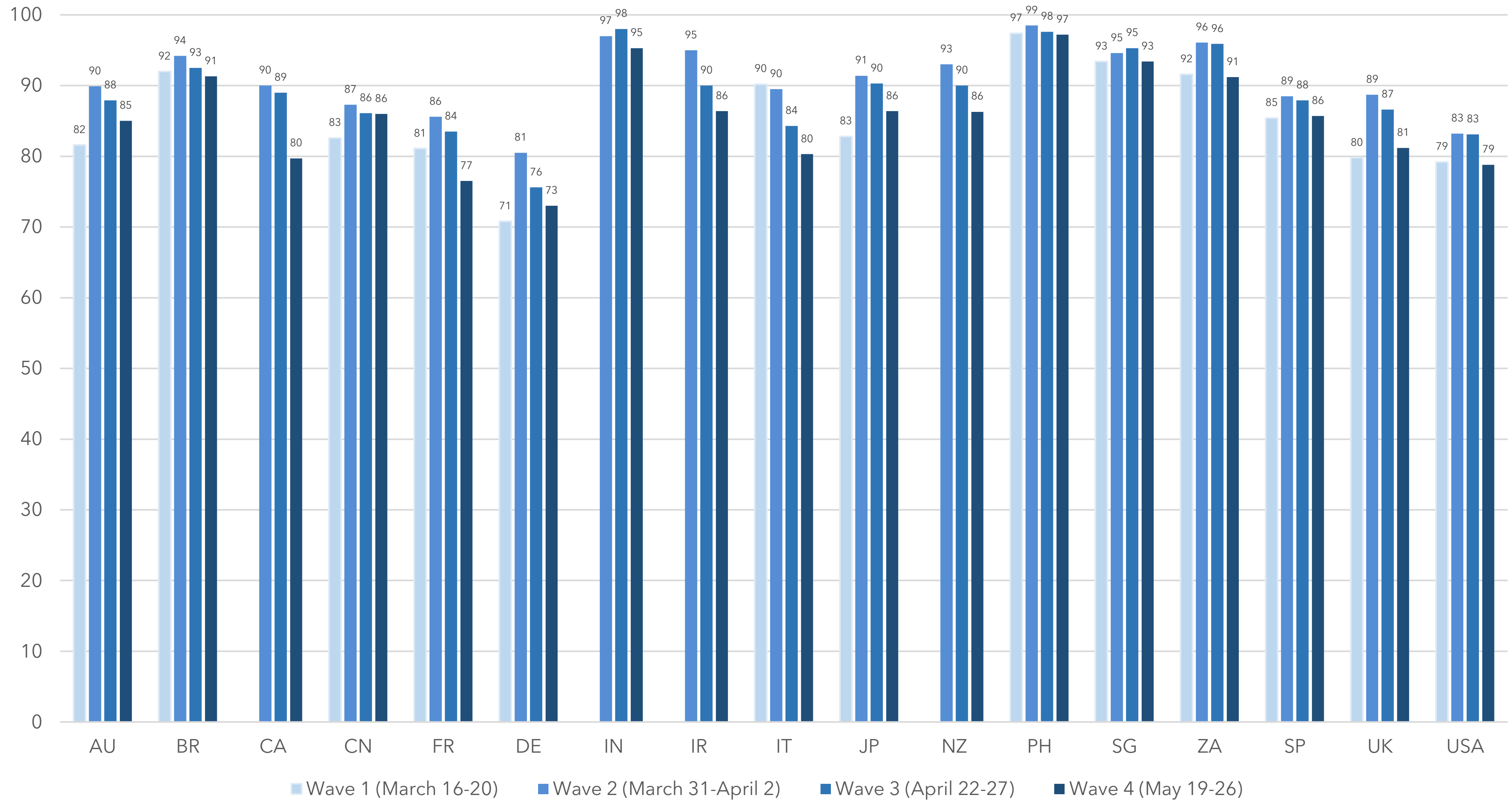
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Not at all concerned	2	3	3	4	2	3	2	4
A little concerned	8	10	13	15	11	11	10	13
Quite concerned	19	22	24	23	24	20	20	24
Very concerned	39	35	34	35	35	36	38	34
Extremely concerned	33	30	26	23	27	30	30	25

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

Levels of Concern (Global): Trended Data

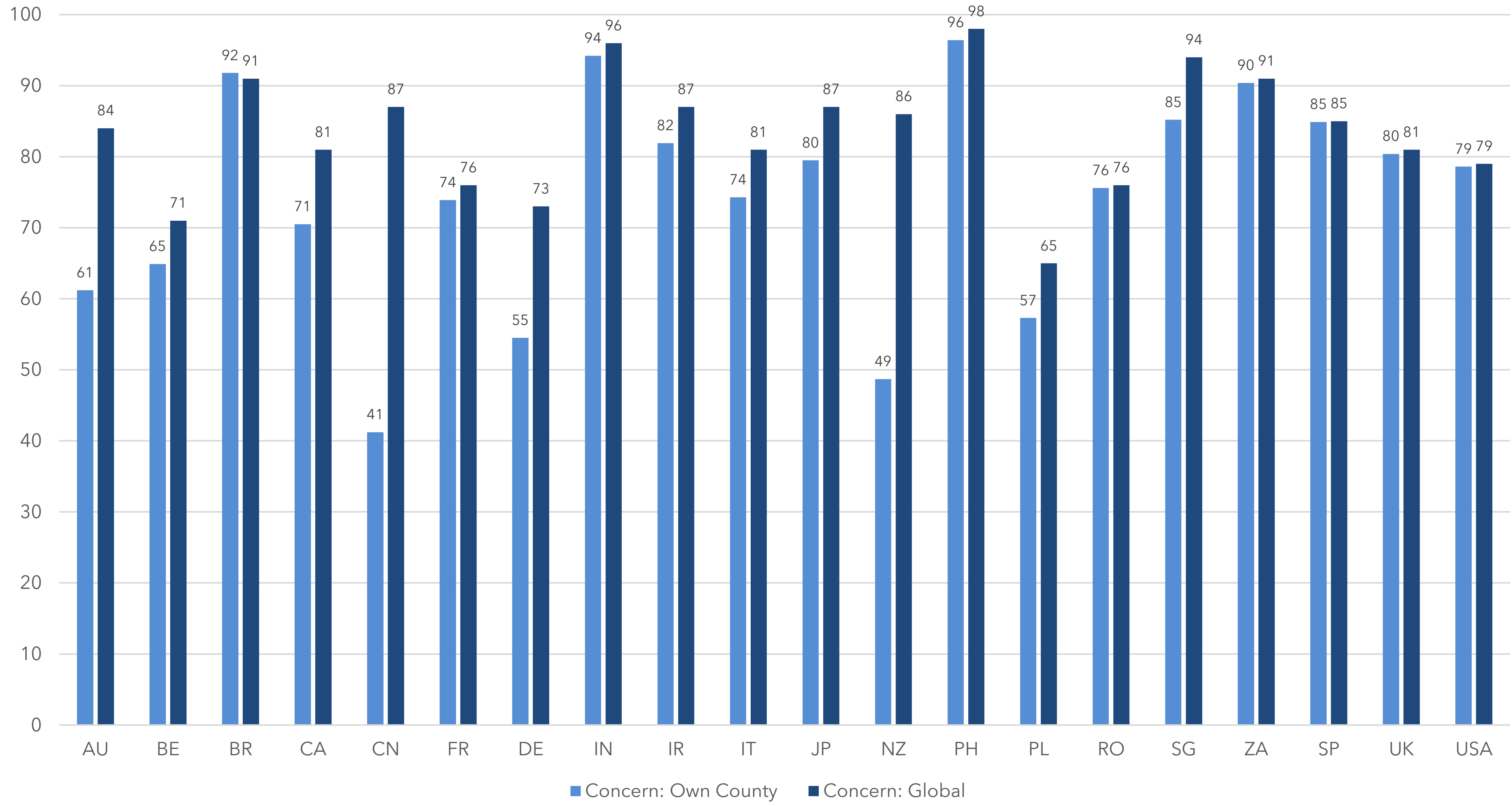
% who say they're extremely, very, or quite concerned about the coronavirus / COVID-19 situation globally



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

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	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
A few more days	2	1	0	2	2	2	2	1	2	1	1	0	2	0	1	2	1	0	1	1	3
1-2 weeks	3	2	2	3	2	5	2	2	3	1	3	2	7	1	3	4	2	0	1	3	3
3-4 weeks	6	4	5	4	3	9	3	4	4	4	5	2	10	2	5	10	2	0	4	4	4
2-3 months	27	15	21	20	12	40	14	15	27	11	15	10	21	10	15	19	9	5	14	11	14
4-5 months	12	10	8	16	8	12	12	8	16	9	11	4	9	11	11	8	9	5	10	7	9
6 months	18	20	13	21	15	20	20	16	19	11	16	12	18	15	14	11	24	16	17	14	15
Up to a year	17	26	27	21	27	8	21	30	18	27	31	21	22	39	26	19	35	34	24	29	23
Longer than a year	16	23	25	15	32	6	25	26	11	35	19	49	12	23	26	28	19	39	29	31	30

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

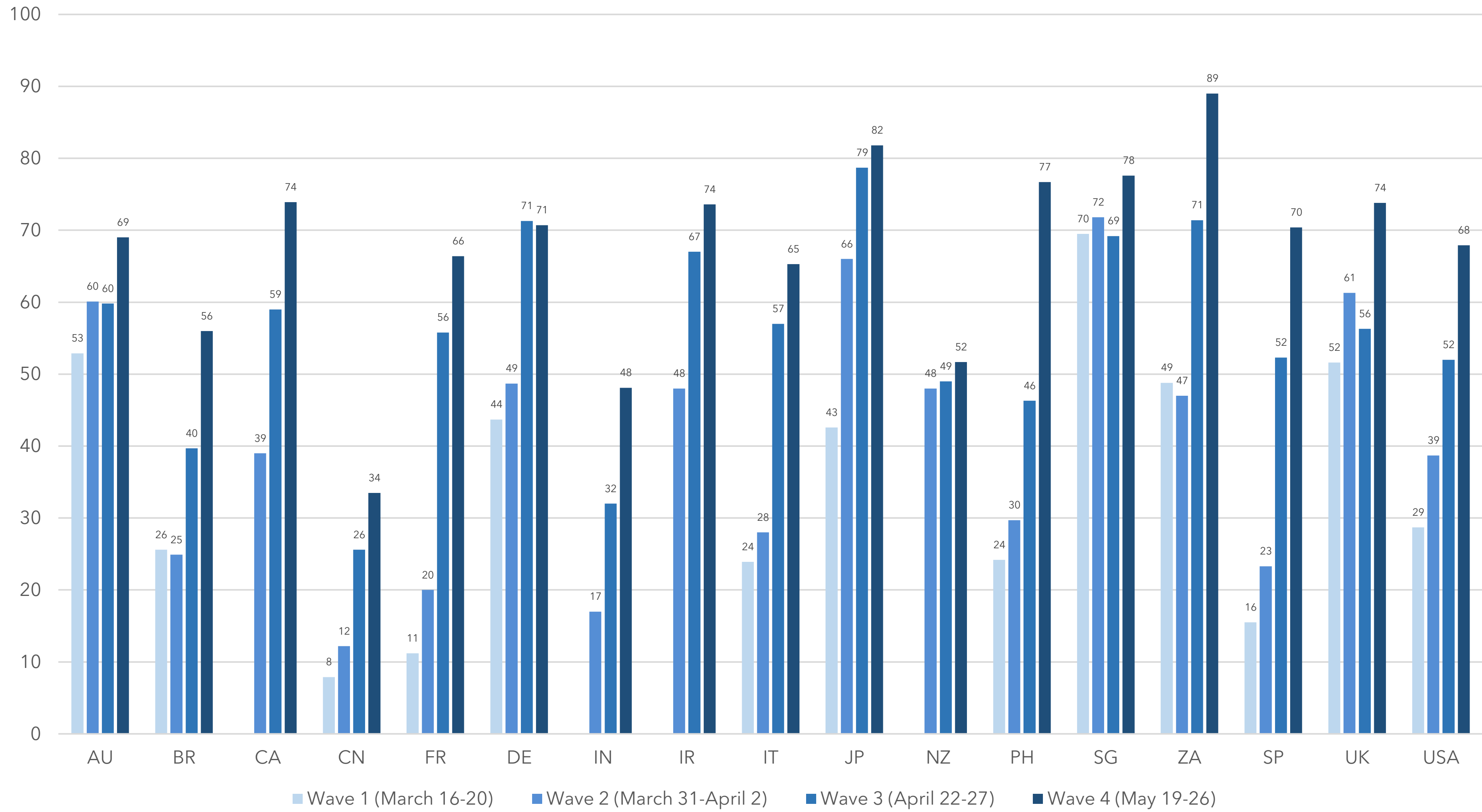
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
A few more days	3	2	1	1	1	2	2	4
1-2 weeks	4	4	3	1	3	4	3	4
3-4 weeks	2	7	6	3	5	6	5	6
2-3 months	31	29	22	18	25	28	27	24
4-5 months	15	12	9	8	11	12	12	11
6 months	18	18	19	18	17	19	19	18
Up to a year	18	16	17	25	19	15	17	16
Longer than a year	10	13	23	27	18	15	15	17

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	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
A few more days	1	0	0	2	1	0	2	1	2	0	0	0	0	0	1	2	1	0	0	1	2
1-2 weeks	1	1	1	1	1	0	2	2	1	2	1	1	2	1	2	1	1	1	1	2	1
3-4 weeks	2	1	1	3	2	1	2	1	3	1	2	1	1	1	2	6	1	1	1	2	2
2-3 months	6	2	4	10	4	6	5	4	7	4	5	2	3	4	5	11	2	1	3	3	6
4-5 months	9	3	8	13	5	8	7	6	13	6	7	3	3	6	5	9	4	2	7	5	7
6 months	19	10	12	19	8	26	16	9	19	6	11	6	6	10	11	7	12	6	10	10	11
Up to a year	28	24	26	26	24	31	26	28	28	25	32	18	26	36	26	24	31	30	26	26	25
Longer than a year	36	58	48	25	55	28	40	49	28	56	42	69	60	44	48	41	48	60	51	50	45

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

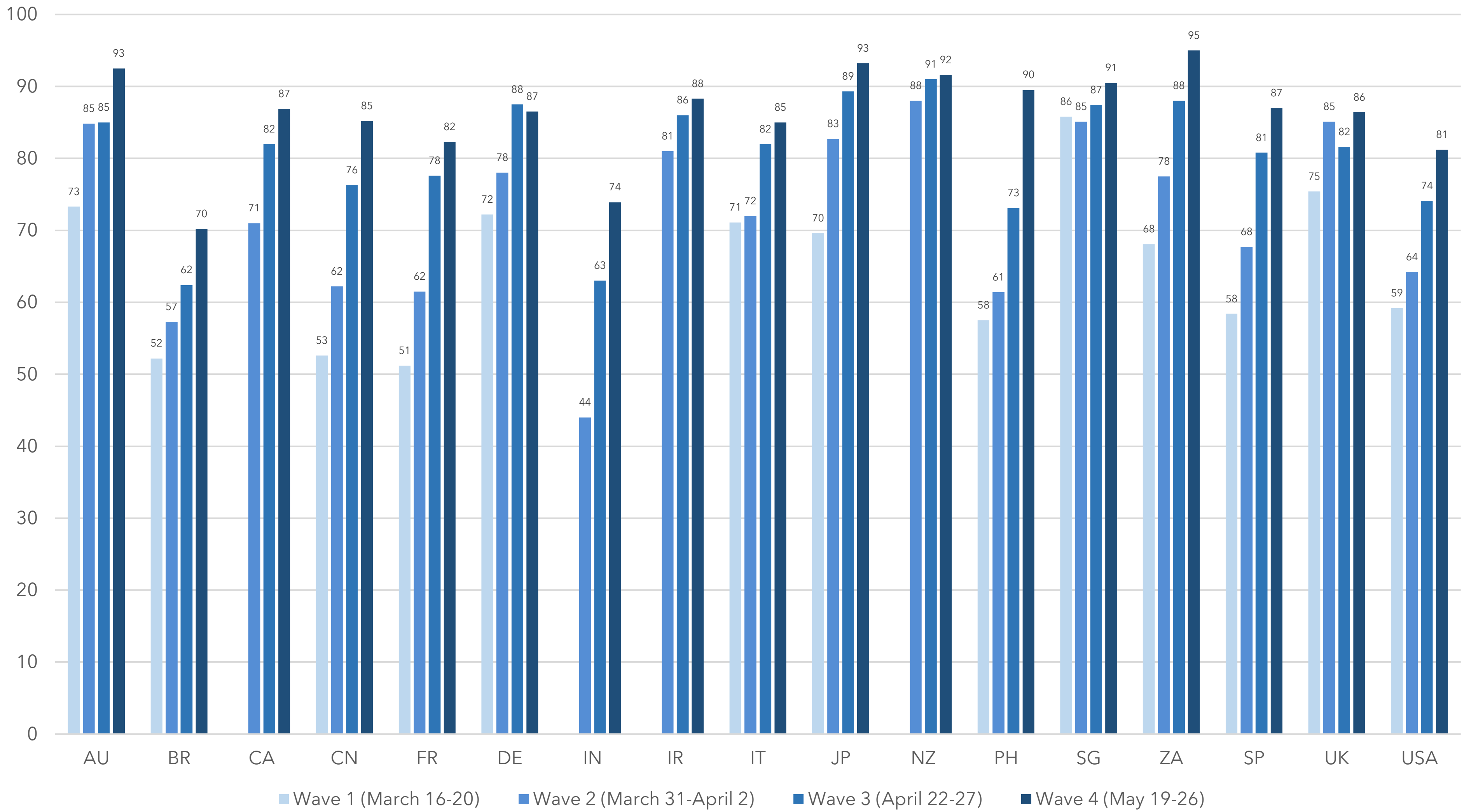
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
A few more days	2	1	0	1	1	1	1	3
1-2 weeks	1	1	1	0	1	1	1	2
3-4 weeks	1	2	2	1	1	2	1	3
2-3 months	5	6	5	4	5	6	6	6
4-5 months	10	9	8	6	8	9	8	10
6 months	19	20	17	14	18	19	19	16
Up to a year	30	28	27	28	28	28	30	27
Longer than a year	31	34	40	46	38	34	33	34

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

Expected Length of Outbreak (Global): Trended Data

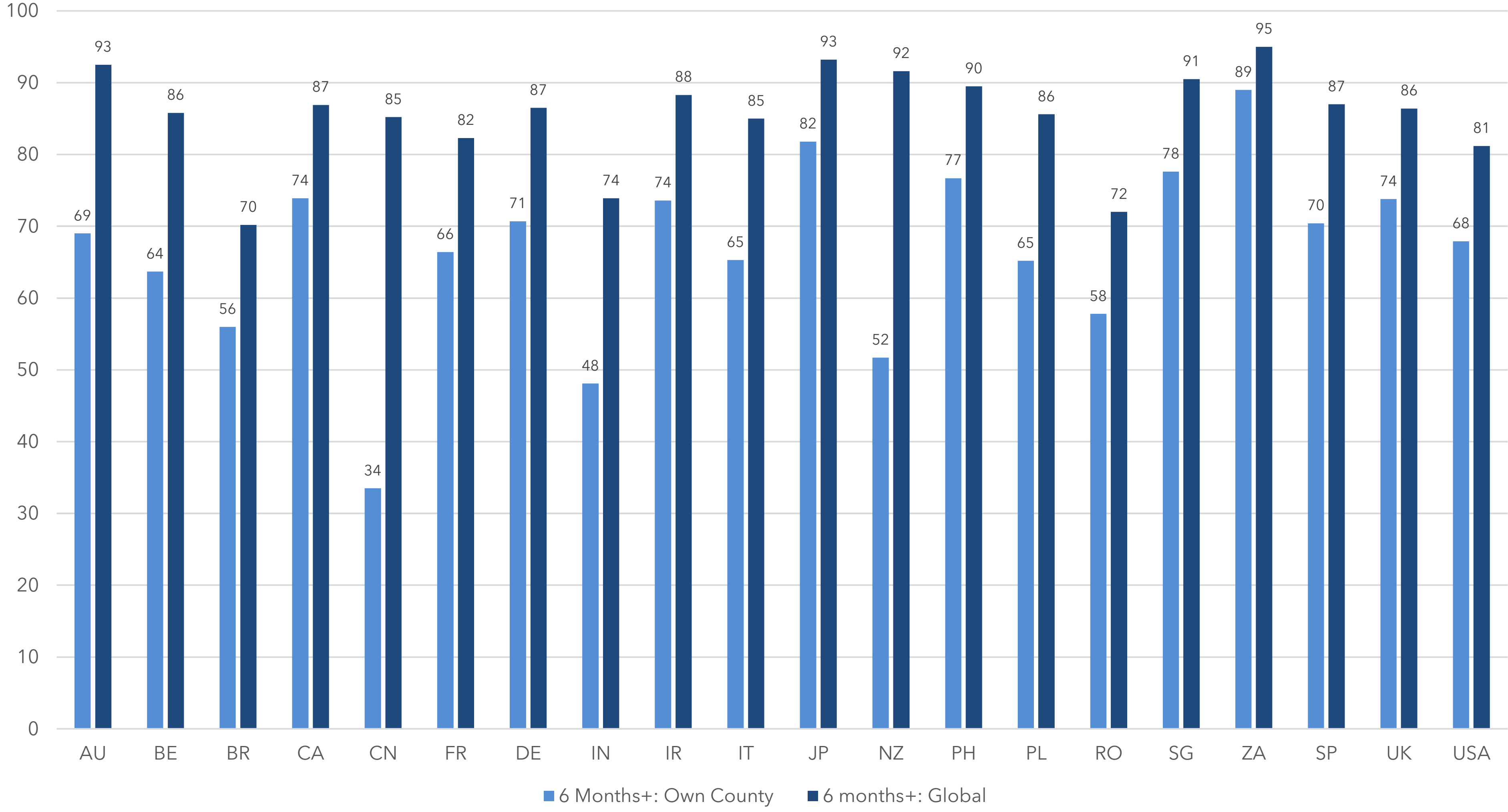
% who say they think the coronavirus / COVID-19 outbreak will last 6 months or more globally



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 own country vs globally



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	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1 - Not optimistic at all	6	4	5	23	5	2	10	4	2	3	5	30	1	5	3	6	4	7	8	7	6
2	7	4	14	26	6	1	18	6	6	6	11	27	3	10	9	8	6	12	18	12	9
3	20	28	45	27	33	6	41	35	20	30	41	31	13	29	27	34	30	37	43	36	35
4	27	39	31	14	39	26	24	41	33	40	32	9	37	25	34	29	45	22	25	33	26
5 - Very optimistic	40	26	6	10	17	66	8	14	40	23	11	3	46	31	28	23	16	21	7	13	24

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

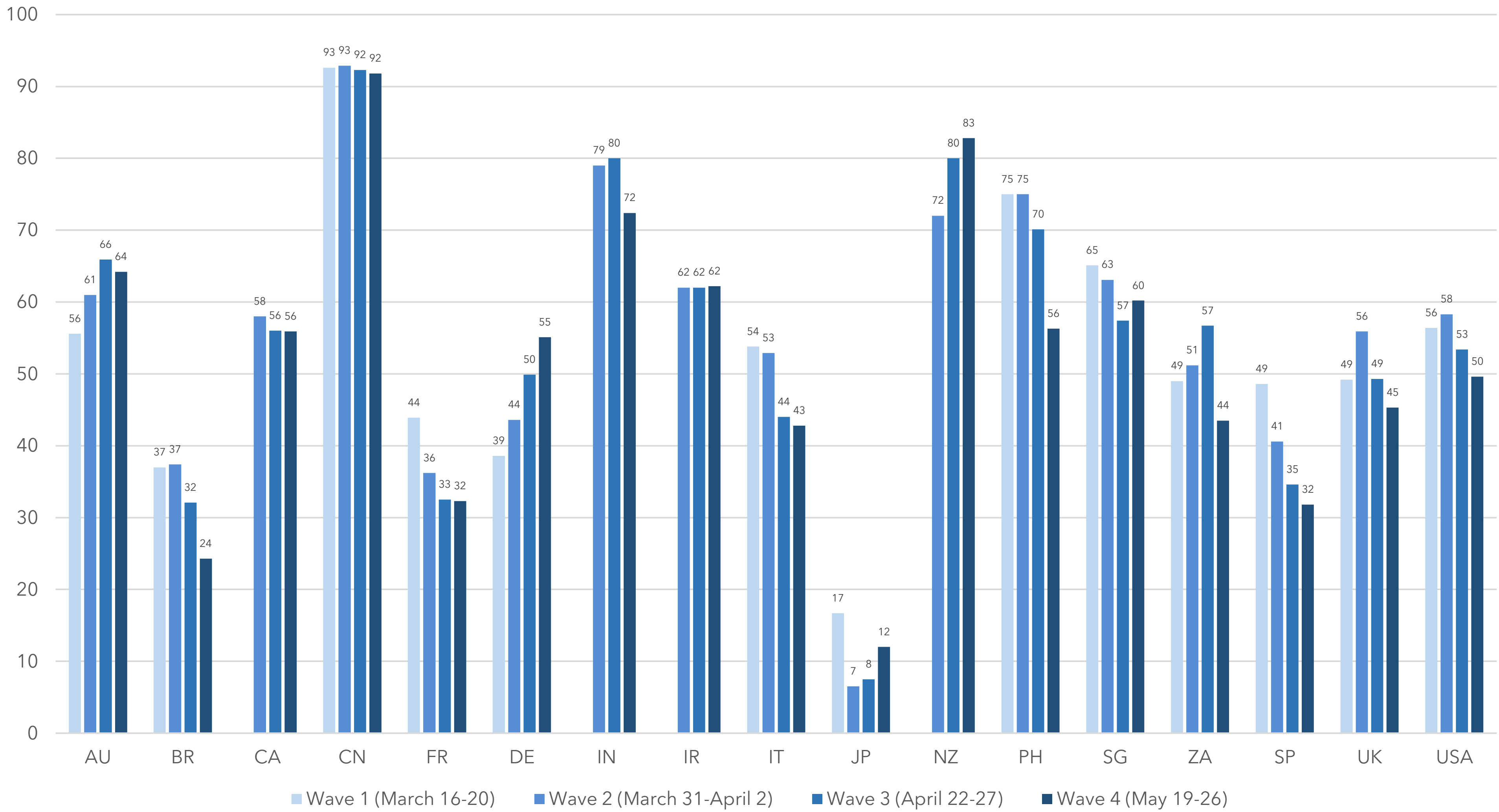
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
1 - Not optimistic at all	5	5	7	8	6	5	6	6
2	9	6	8	10	8	7	6	8
3	22	17	22	30	22	19	19	22
4	28	26	27	29	27	27	28	27
5 - Very optimistic	36	46	37	24	38	42	41	37

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	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1 - Not optimistic at all	8	9	9	5	7	9	9	9	2	4	6	42	11	1	2	5	6	4	10	7	7
2	14	16	22	20	14	16	22	26	6	16	16	26	19	4	7	10	18	9	24	13	11
3	36	47	45	35	42	42	46	48	24	36	41	26	40	24	27	30	41	31	39	41	36
4	25	20	19	27	27	25	17	14	29	30	28	5	21	33	33	30	26	30	22	28	27
5 - Very optimistic	16	8	5	12	9	8	6	4	39	13	10	2	10	38	31	24	8	26	6	10	19

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

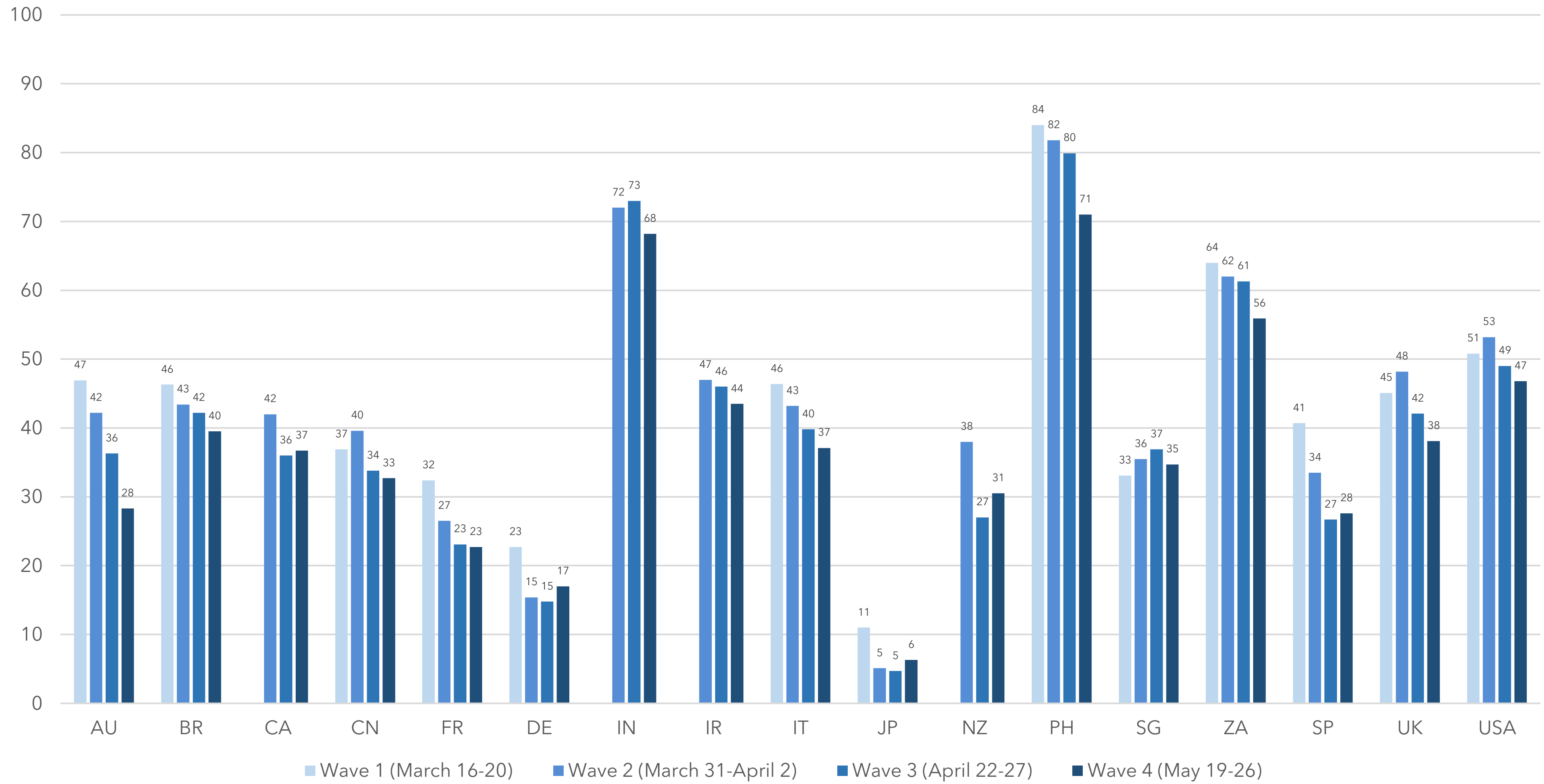
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
1 - Not optimistic at all	5	7	10	13	8	8	8	6
2	13	14	16	16	14	15	14	14
3	33	37	37	36	39	34	34	36
4	28	26	23	23	24	26	28	26
5 - Very optimistic	21	16	14	12	15	17	16	18

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

Levels of Optimism (Global): Trended Data

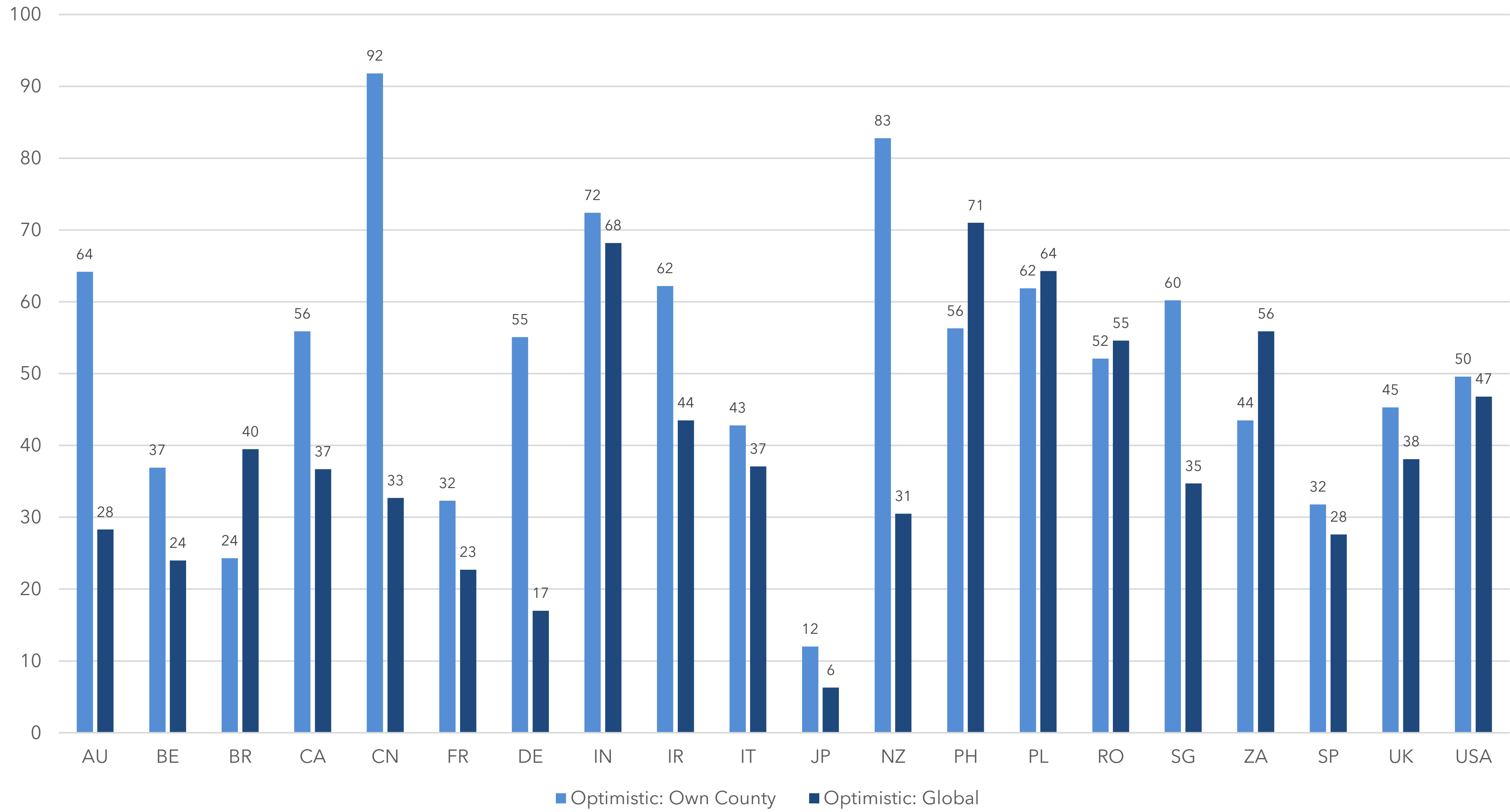
% who say they feel optimistic that the world will overcome the coronavirus / COVID-19 outbreak



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	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
No impact	13	20	16	6	18	15	25	29	4	12	12	7	22	1	11	8	7	3	8	24	22
Small impact	44	45	47	29	43	61	43	41	28	42	43	41	43	11	37	34	40	25	34	41	37
Big impact	30	24	24	43	25	18	22	16	55	24	29	33	21	48	30	42	38	46	34	20	24
Dramatic impact	9	7	6	15	9	5	4	6	11	13	11	6	7	39	14	9	10	21	10	6	10
Not sure	4	4	7	7	6	1	6	9	2	10	6	13	7	1	9	8	6	5	15	9	7

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

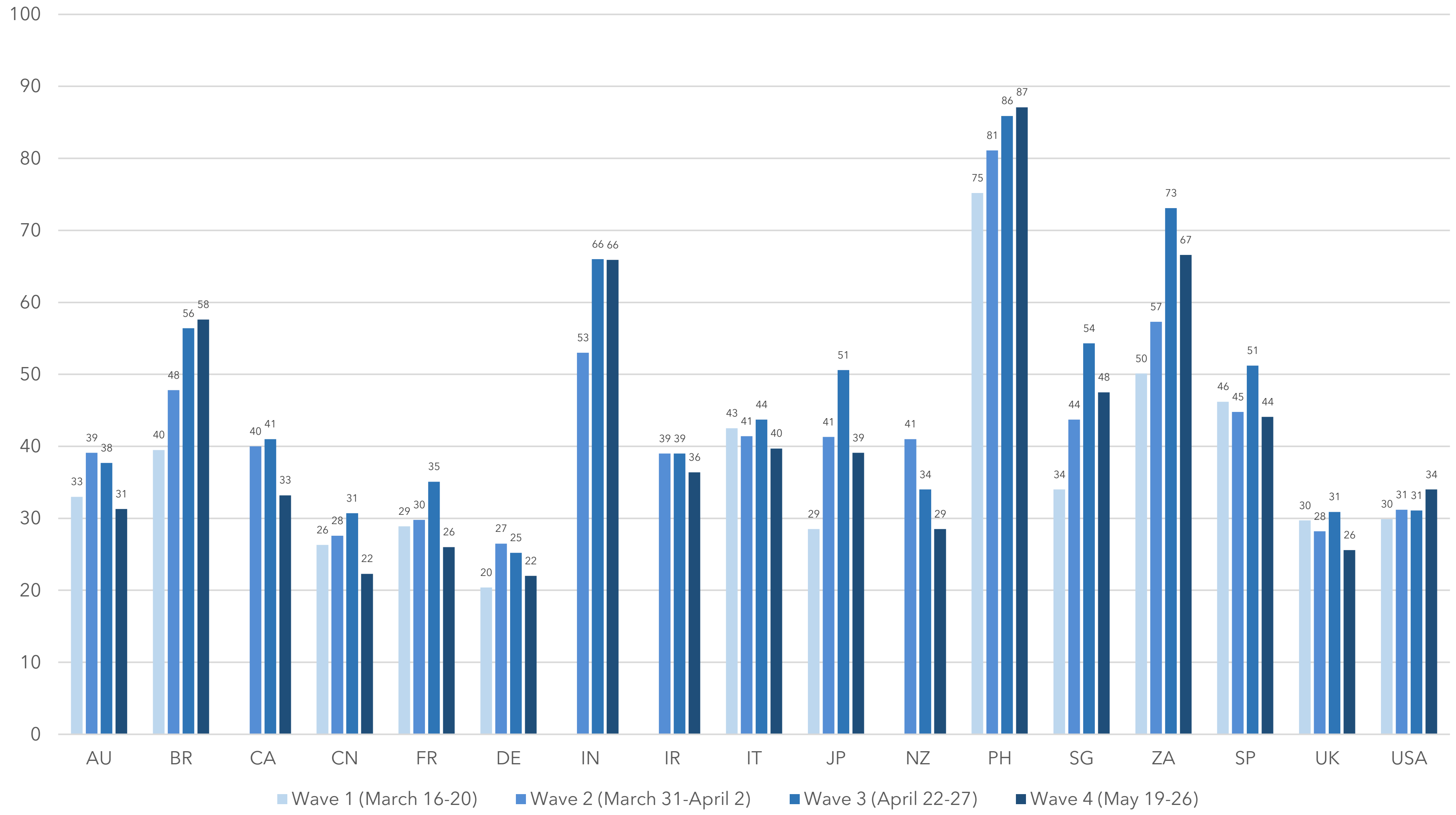
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
No impact	7	13	15	20	13	13	15	13
Small impact	39	46	45	44	44	45	47	39
Big impact	38	30	26	21	29	30	28	32
Dramatic impact	11	8	9	7	9	9	7	12
Not sure	5	3	5	8	5	4	4	5

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	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
No impact	2	1	0	1	0	2	1	2	1	1	1	1	0	0	1	0	1	0	0	1	2
Small impact	16	6	5	4	7	30	9	11	6	6	6	3	8	2	10	7	8	3	2	7	7
Big impact	52	57	64	42	54	49	55	54	69	47	55	59	58	39	37	56	60	46	53	47	46
Dramatic impact	28	34	27	50	34	17	31	27	22	44	37	31	31	58	48	33	31	51	43	41	40
Not sure	3	3	3	3	5	2	4	7	2	2	2	7	3	1	3	4	1	0	2	4	4

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

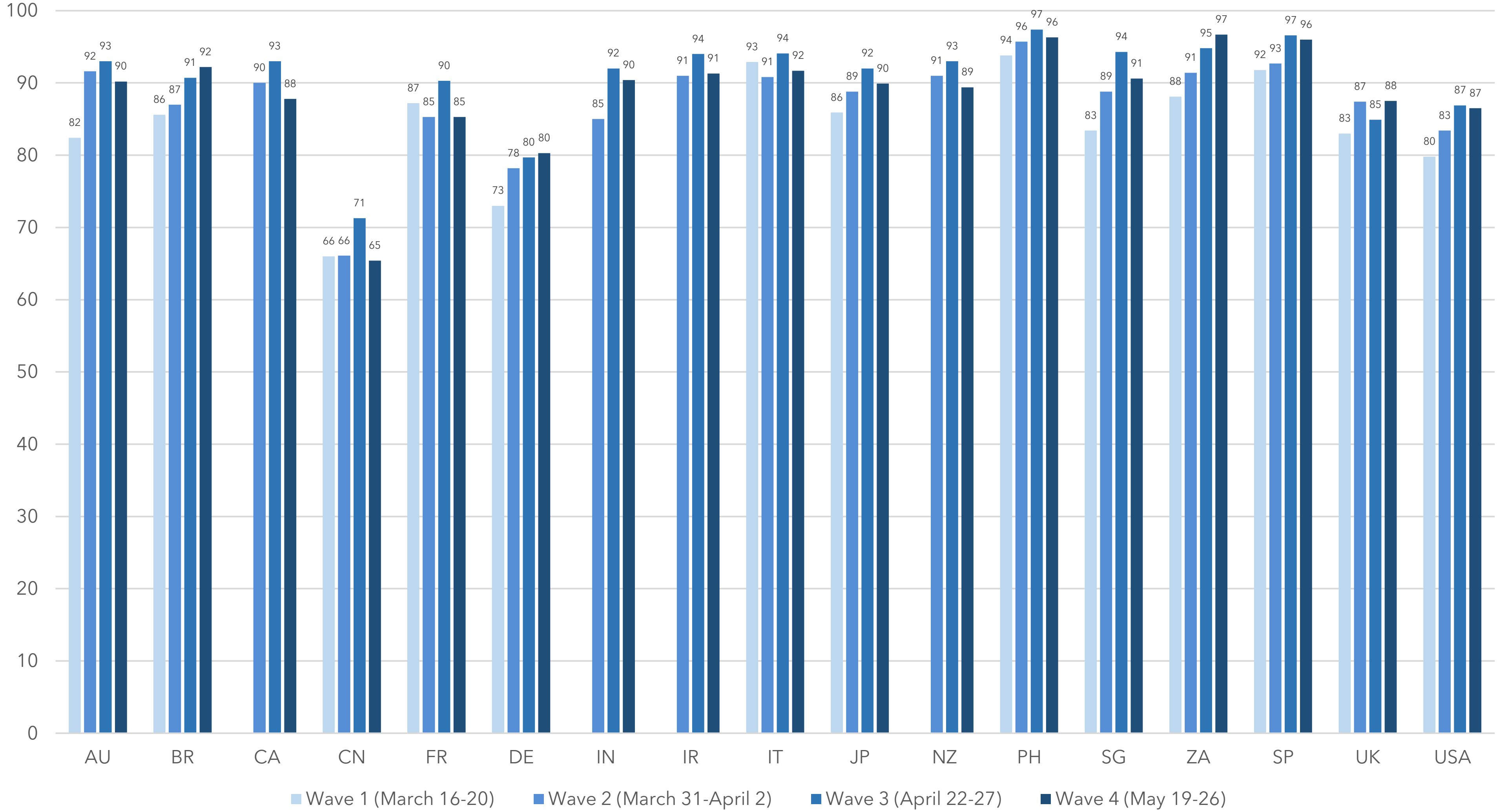
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
No impact	2	2	1	1	1	2	2	2
Small impact	11	18	16	10	16	16	18	16
Big impact	53	53	51	50	51	54	51	49
Dramatic impact	30	25	29	37	30	26	28	30
Not sure	5	2	3	3	3	3	2	4

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

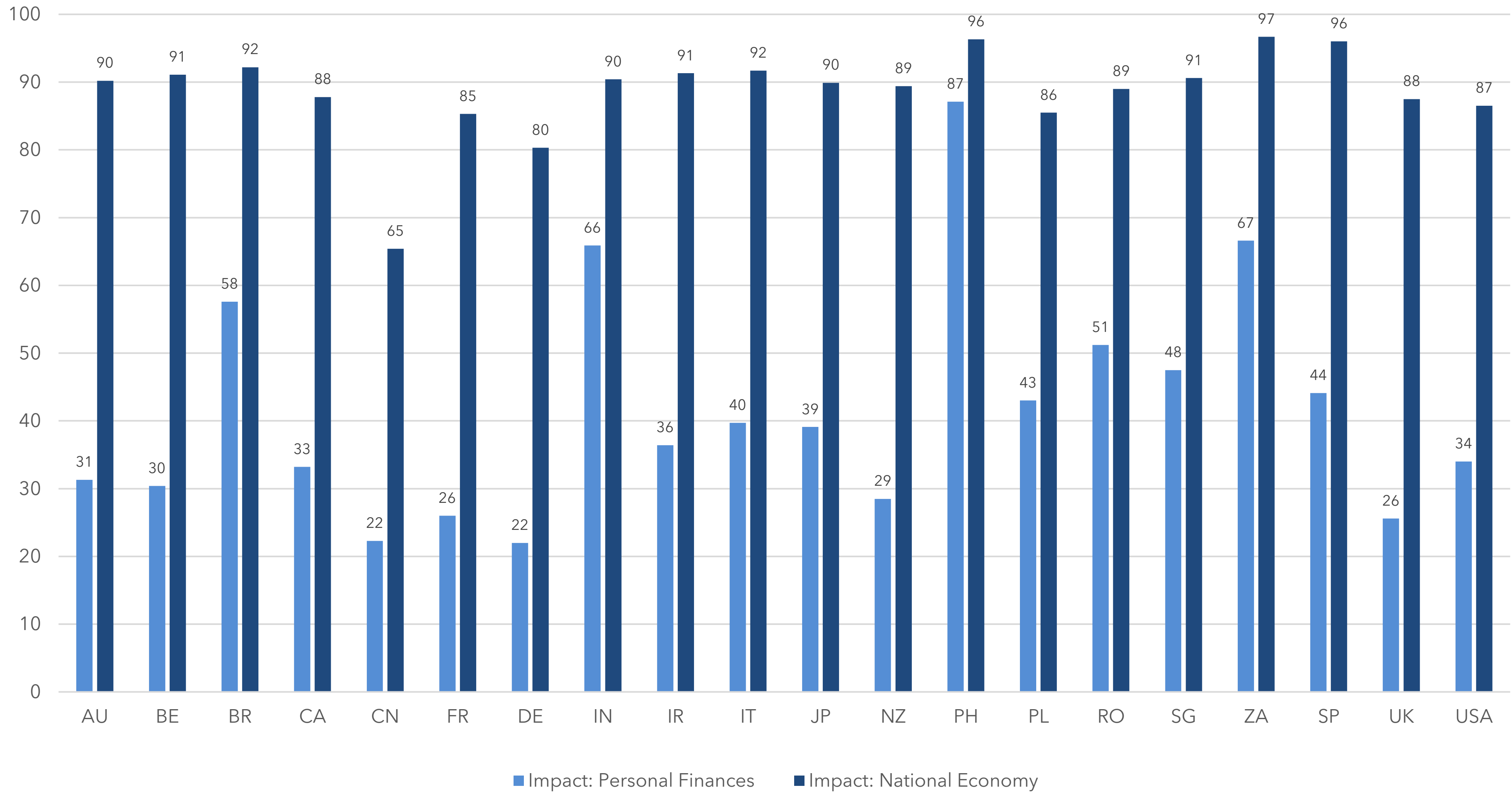
% who say they expect coronavirus / COVID-19 to have a dramatic or big effect on their country's economy



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	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
No impact	1	1	0	1	0	1	1	2	1	1	0	0	0	0	2	1	1	0	0	2	2
Small impact	5	3	5	5	5	5	8	8	5	5	8	3	2	1	7	6	4	2	3	8	8
Big impact	45	39	50	47	46	35	54	41	64	39	58	53	36	33	33	58	44	49	61	46	44
Dramatic impact	45	53	41	43	44	55	32	42	28	53	31	39	58	64	54	31	50	46	33	41	40
Not sure	4	4	5	4	5	4	5	7	2	3	3	5	4	1	4	5	2	3	2	4	6

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

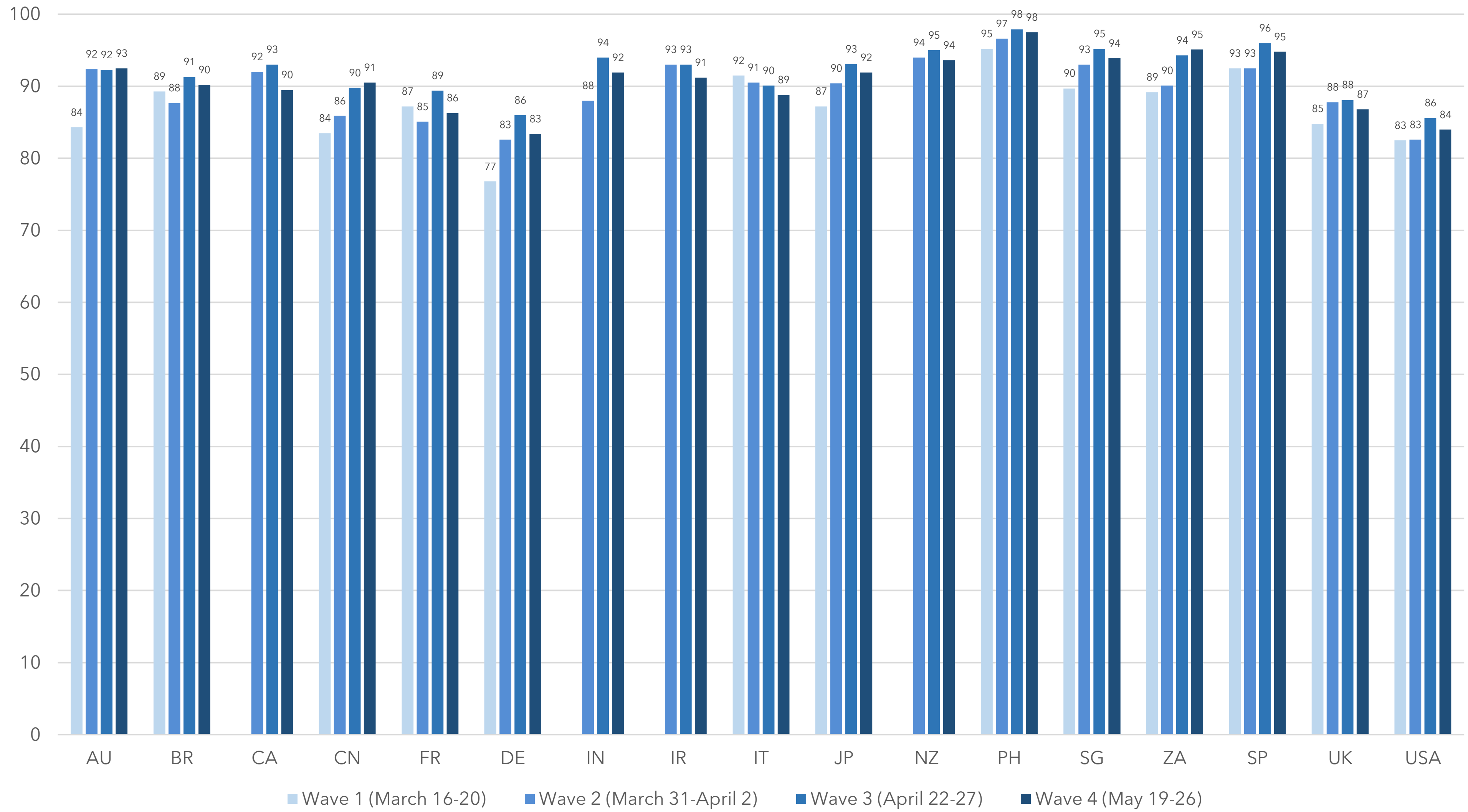
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
No impact	1	1	1	0	1	1	1	2
Small impact	5	6	4	5	5	6	5	7
Big impact	45	46	44	49	43	47	46	43
Dramatic impact	42	45	47	42	46	44	46	42
Not sure	7	2	4	5	5	3	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	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Cut back on the day-to-day things you buy	39	46	32	55	52	28	37	25	44	48	48	45	50	63	43	37	53	62	33	38	49
Delay big purchases (e.g. car, vacations, home appliances, etc)	80	63	60	80	68	86	62	59	93	82	76	40	69	92	70	83	81	80	79	66	68
Look for cheaper versions of products from alternative brands	32	34	24	51	32	23	16	29	46	39	28	18	37	60	38	44	53	58	30	29	29
Look for flexible payment options (e.g. pay in instalments, etc)	21	14	8	30	15	16	6	9	41	12	9	6	15	49	9	22	15	35	14	9	12
Make fewer but more expensive purchases	20	10	16	10	14	27	9	14	19	14	9	12	12	15	26	18	14	14	10	12	12
Put more purchases on credit cards	16	10	6	24	13	17	3	6	17	8	5	16	8	11	25	18	12	11	11	10	14
Reduce regular financial commitments (e.g. cancel subscriptions, memberships, etc)	38	23	11	39	26	48	13	20	44	27	32	15	23	50	18	16	32	51	20	20	23
Take out a loan	6	2	2	7	3	4	3	4	13	5	5	2	2	15	3	6	4	8	4	6	3
Use your savings	34	22	18	30	25	32	15	14	58	22	27	22	18	58	23	28	38	42	30	24	20
Wait for products to be on promotion, discount, sale, etc	41	45	35	52	48	40	32	32	46	45	50	21	47	38	38	44	54	54	37	35	37
None of these	7	16	17	3	12	6	19	23	0	6	6	19	12	1	9	6	5	2	8	16	13

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	43	35	41	44	40	37	35	38
Delay big purchases (e.g. car, vacations, home appliances, etc)	86	84	73	64	79	81	86	75
Look for cheaper versions of products from alternative brands	44	31	28	24	34	31	28	34
Look for flexible payment options (e.g. pay in instalments, etc)	27	23	15	10	18	24	24	19
Make fewer but more expensive purchases	19	23	17	8	20	19	22	18
Put more purchases on credit cards	11	18	14	14	14	17	21	12
Reduce regular financial commitments (e.g. cancel subscriptions, memberships, etc)	43	41	35	22	37	40	37	35
Take out a loan	7	8	4	1	4	8	7	8
Use your savings	46	37	25	19	31	37	31	36
Wait for products to be on promotion, discount, sale, etc	44	42	37	36	43	38	39	38
None of these	3	5	11	16	7	7	7	8

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

Delayed Purchases

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

	All	AU	BE	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Car / vehicle	22	16	10	22	18	22	11	13	31	17	18	6	13	25	14	25	10	26	16	14	17
Clothes	29	22	32	35	31	20	31	17	49	33	41	13	27	49	25	38	23	47	39	25	25
Flights	32	33	21	36	37	34	19	25	29	47	29	14	38	47	22	35	50	35	35	29	34
Home appliances / devices (e.g. TV, white goods)	22	13	7	27	16	21	9	10	36	12	18	8	14	40	13	25	17	30	15	13	11
Home furnishings (e.g. bed, sofa, etc)	18	12	11	24	17	17	11	12	25	16	16	4	12	35	16	28	19	30	17	13	14
Insurance	7	3	2	5	5	6	2	4	13	6	6	2	5	14	6	10	8	9	5	5	5
Luxury items (e.g. designer clothes, shoes, fragrances, etc)	25	13	11	15	13	35	7	10	33	16	12	5	12	34	18	26	21	30	11	12	10
Personal electronics (e.g. laptop, tablet, PC, etc)	21	15	7	24	20	19	9	12	38	15	17	4	12	41	16	24	19	32	15	11	11
Smartphone	23	14	8	25	14	21	10	11	43	13	16	5	12	38	12	24	20	24	16	13	15
Smart devices (e.g. smart-watches, fitness trackers, etc)	14	8	4	9	7	15	5	6	26	9	7	2	8	29	5	16	11	20	8	6	8
Vacations / trips	51	45	37	43	48	61	41	40	45	57	50	24	42	63	47	60	57	46	57	44	47
None of these	18	34	34	17	28	13	32	39	5	13	20	55	28	6	27	14	18	15	16	30	29

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*

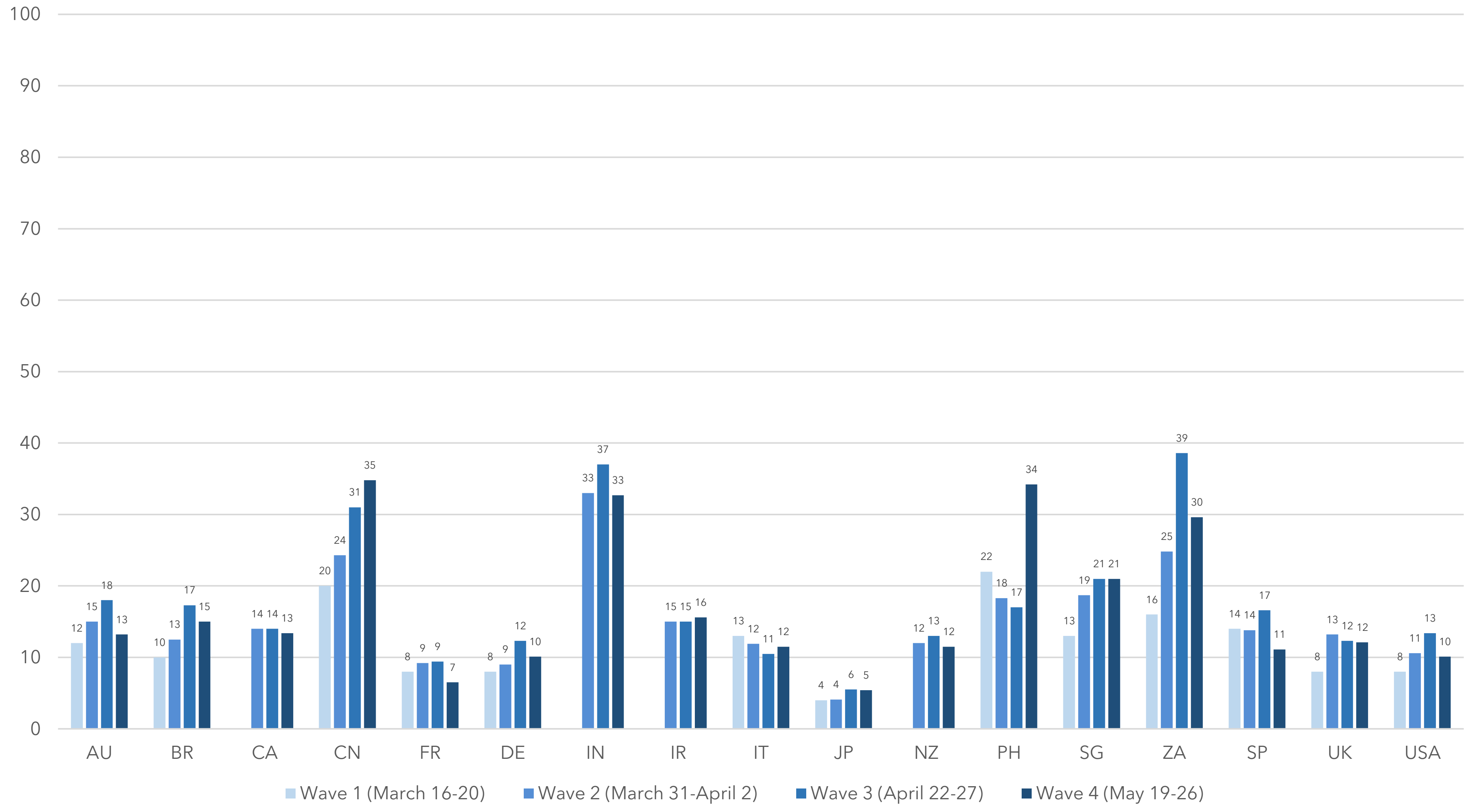
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Car / vehicle	22	24	19	14	19	24	27	18
Clothes	43	27	25	20	31	27	24	31
Flights	22	38	29	31	29	34	43	20
Home appliances / devices (e.g. TV, white goods)	25	23	19	12	21	23	23	20
Home furnishings (e.g. bed, sofa, etc)	16	20	18	12	19	18	19	17
Insurance	7	9	5	2	6	8	8	7
Luxury items (e.g. designer clothes, shoes, fragrances, etc)	26	30	21	11	25	26	32	18
Personal electronics (e.g. laptop, tablet, PC, etc)	31	22	16	10	19	23	20	22
Smartphone	30	25	18	11	20	25	23	27
Smart devices (e.g. smartwatches, fitness trackers, etc)	20	15	11	6	14	15	16	15
Vacations / trips	43	55	51	50	52	50	58	38
None of these	11	14	25	34	18	18	13	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

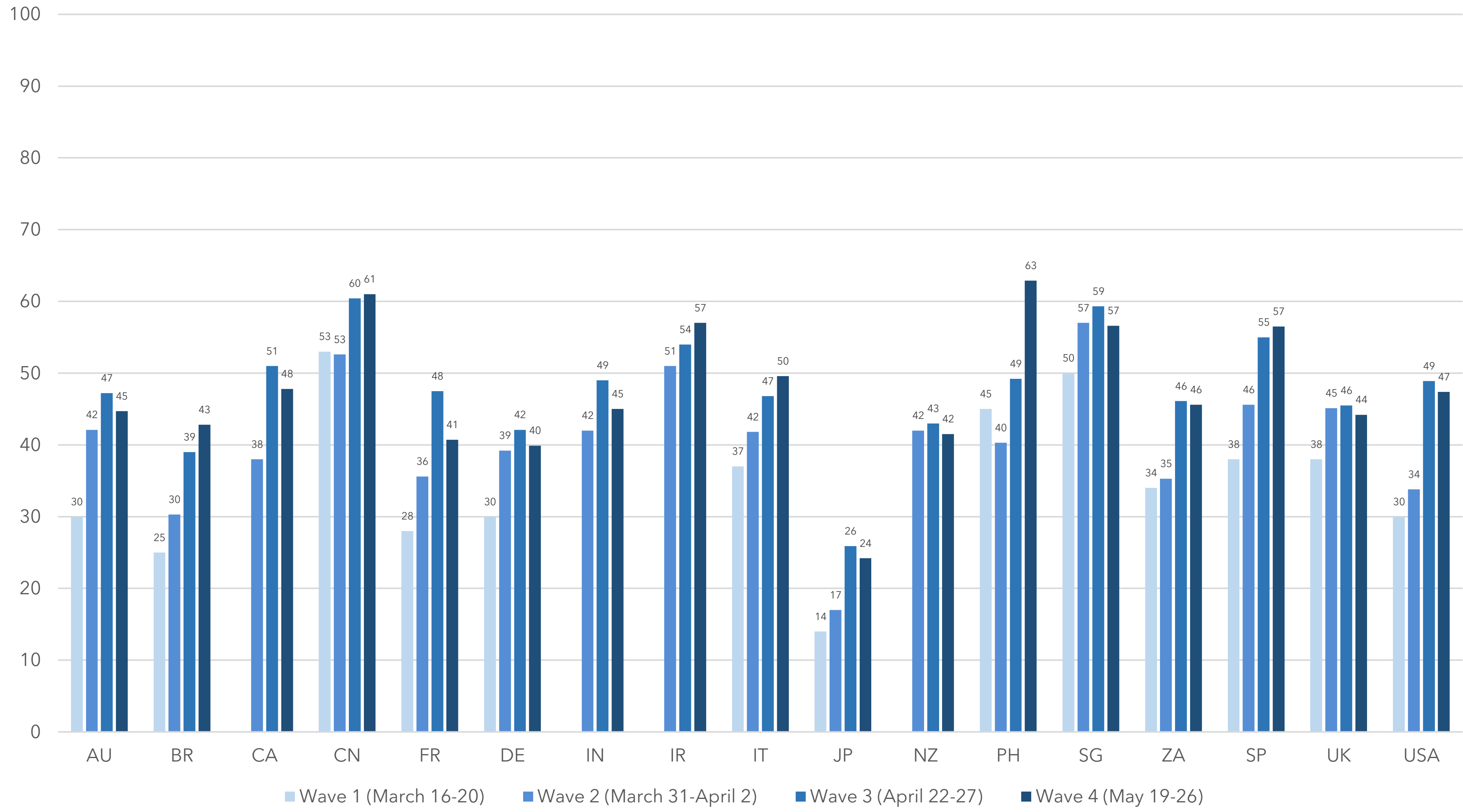
% who say they've delayed purchasing luxury items (e.g. designer clothes, shoes, fragrances, etc.) as a result of the coronavirus / COVID-19 outbreak



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	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
When the outbreak begins to decrease in my country	22	13	13	20	14	25	20	12	29	14	21	9	10	9	24	16	9	23	22	12	19
When the outbreak is over in my country	26	20	14	27	21	27	17	13	37	23	23	17	21	30	15	23	19	23	26	19	19
When the outbreak begins to decrease globally	9	6	6	6	4	13	5	7	8	9	7	3	11	5	9	10	14	8	7	9	5
When the outbreak is over globally	12	10	9	14	14	12	8	11	14	16	8	8	10	33	11	10	26	14	8	11	10
Not sure	13	17	25	16	20	10	18	19	7	25	21	9	21	17	14	27	14	18	21	19	19

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

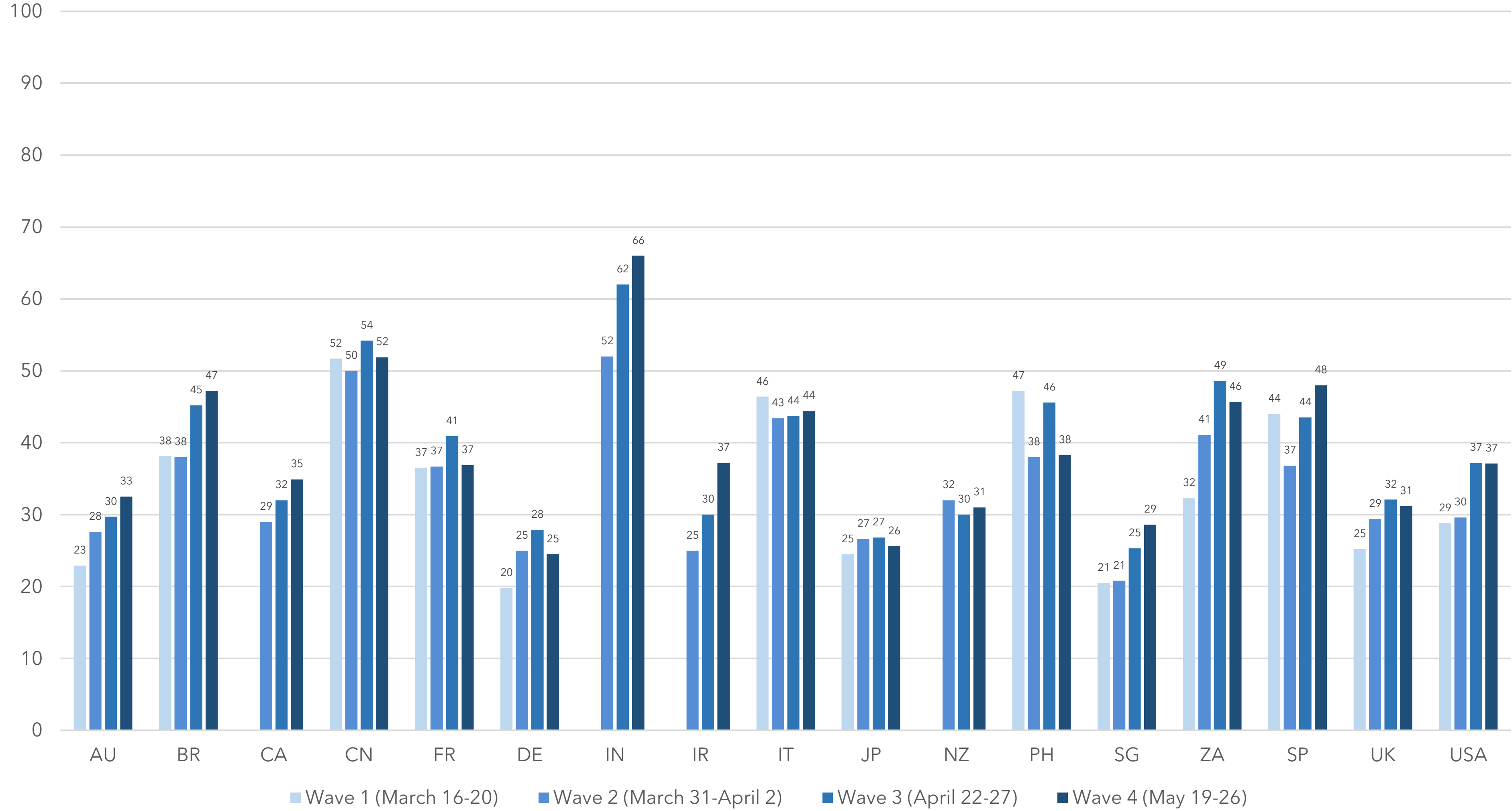
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
When the outbreak begins to decrease in my country	27	24	17	14	22	23	26	21
When the outbreak is over in my country	29	29	21	19	23	29	25	27
When the outbreak begins to decrease globally	9	10	9	6	10	9	11	7
When the outbreak is over globally	13	13	12	9	13	12	15	11
Not sure	10	10	16	20	15	11	12	12

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	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Car / vehicle	9	6	5	10	8	9	5	6	14	8	7	3	6	4	7	10	2	12	6	7	8
Clothes	15	10	22	18	19	10	17	7	27	16	24	8	13	19	16	18	7	30	26	12	10
Flights	9	10	6	14	10	8	5	7	9	17	7	7	12	9	8	7	16	8	10	10	9
Home appliances / devices (e.g. TV, white goods)	12	5	4	13	6	12	5	5	20	5	8	6	7	18	5	9	8	13	7	5	4
Home furnishings (e.g. bed, sofa, etc)	7	5	5	11	7	6	5	6	9	7	5	1	4	15	9	12	9	15	7	6	6
Insurance	3	2	1	1	2	2	2	1	7	3	4	1	2	7	2	4	4	4	2	2	2
Luxury items (e.g. designer clothes, shoes, fragrances, etc)	6	2	2	3	3	8	1	2	9	3	2	2	1	4	4	4	4	2	1	2	2
Personal electronics (e.g. laptop, tablet, PC, etc)	10	6	4	9	7	10	4	3	20	7	7	2	4	15	8	7	9	12	6	4	4
Smartphone	13	7	4	13	4	13	5	5	27	4	7	3	6	11	5	7	10	11	6	6	7
Smart devices (e.g. smart-watches, fitness trackers, etc)	5	2	0	1	2	5	2	2	9	2	1	1	1	4	1	2	3	4	2	2	3
Vacations / trips	23	29	20	21	21	28	25	27	11	26	25	17	23	20	23	28	31	11	29	26	28

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	9	10	8	6	7	11	11	6
Clothes	23	14	13	9	15	14	13	15
Flights	6	11	7	11	8	9	14	4
Home appliances / devices (e.g. TV, white goods)	13	13	10	5	10	12	12	12
Home furnishings (e.g. bed, sofa, etc)	6	9	7	4	8	7	8	7
Insurance	4	4	2	1	2	4	4	3
Luxury items (e.g. designer clothes, shoes, fragrances, etc)	5	6	5	2	6	5	10	4
Personal electronics (e.g. laptop, tablet, PC, etc)	16	12	7	3	9	11	9	9
Smartphone	17	15	10	5	11	15	14	17
Smart devices (e.g. smartwatches, fitness trackers, etc)	6	6	3	2	4	5	5	6
Vacations / trips	14	25	25	31	25	22	29	19

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.

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	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	20	19	23	31	23	9	26	22	31	24	33	12	23	15	33	28	11	26	30	20	27
Somewhat approve	36	37	30	30	33	40	29	37	40	34	37	37	35	34	35	39	39	33	33	31	26
Neither approve nor disapprove	31	35	33	25	33	39	33	27	14	31	21	40	35	27	21	26	41	23	29	39	36
Somewhat disapprove	8	5	7	8	7	8	7	9	11	7	6	7	5	18	7	5	7	11	3	6	7
Strongly disapprove	4	3	7	5	4	4	6	6	5	5	3	5	1	7	4	3	3	7	5	4	5

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

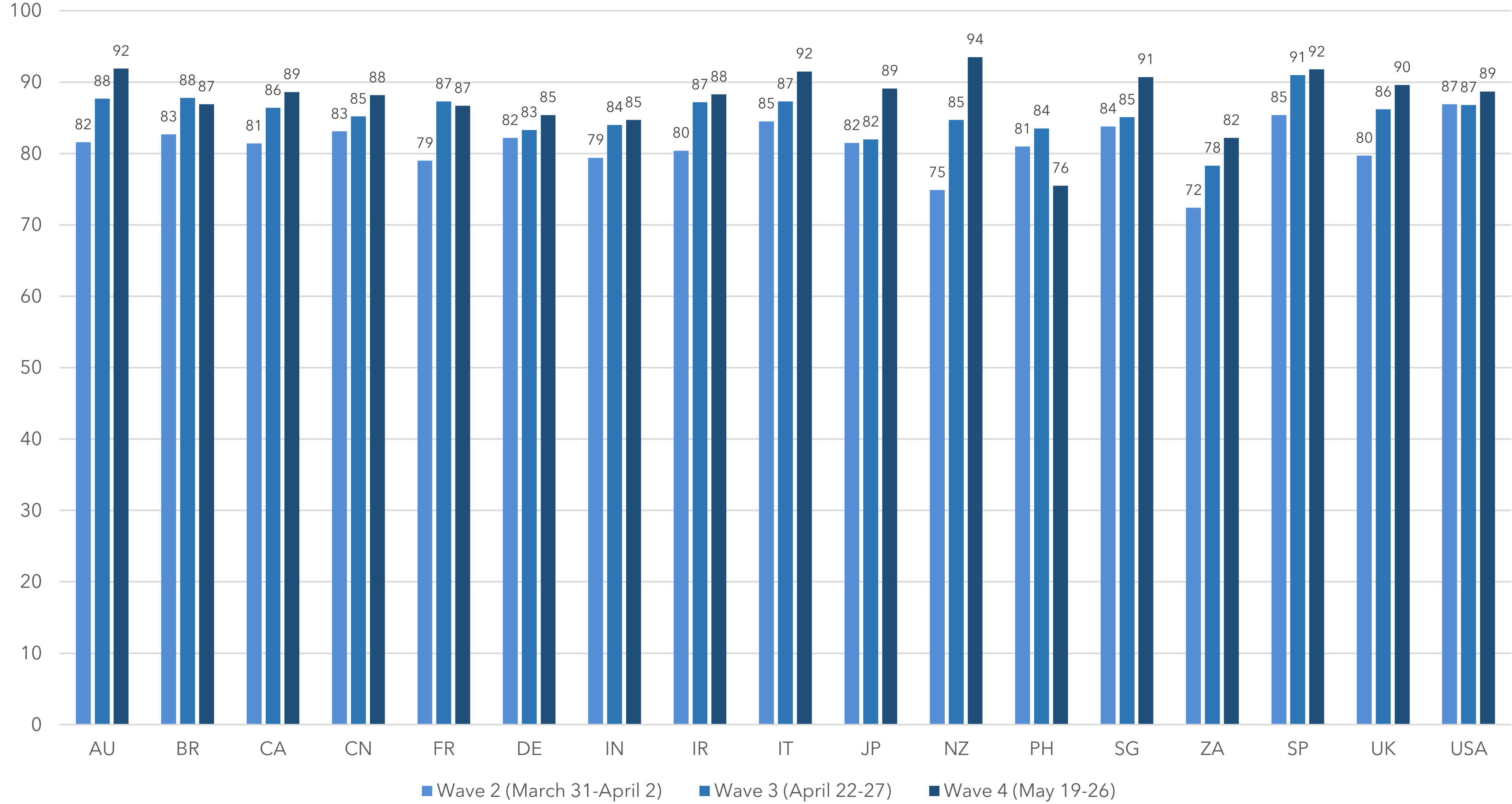
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly approve	20	20	19	21	18	21	23	21
Somewhat approve	34	37	37	34	35	37	39	34
Neither approve nor disapprove	29	30	34	34	34	29	28	30
Somewhat disapprove	11	9	6	7	9	8	7	10
Strongly disapprove	6	4	4	5	3	5	4	5

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	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	34	24	18	55	28	30	19	17	47	31	40	23	27	51	26	23	19	52	31	22	27
Somewhat approve	43	41	36	30	38	53	38	36	37	41	37	40	44	37	40	40	52	31	36	41	35
Neither approve nor disapprove	16	26	32	10	25	14	28	24	8	19	14	30	25	8	18	24	24	12	22	27	26
Somewhat disapprove	4	5	6	2	5	3	7	12	5	6	4	4	3	3	8	5	4	3	6	5	7
Strongly disapprove	3	4	9	3	4	1	8	12	3	4	5	4	3	1	9	7	1	3	5	5	5

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

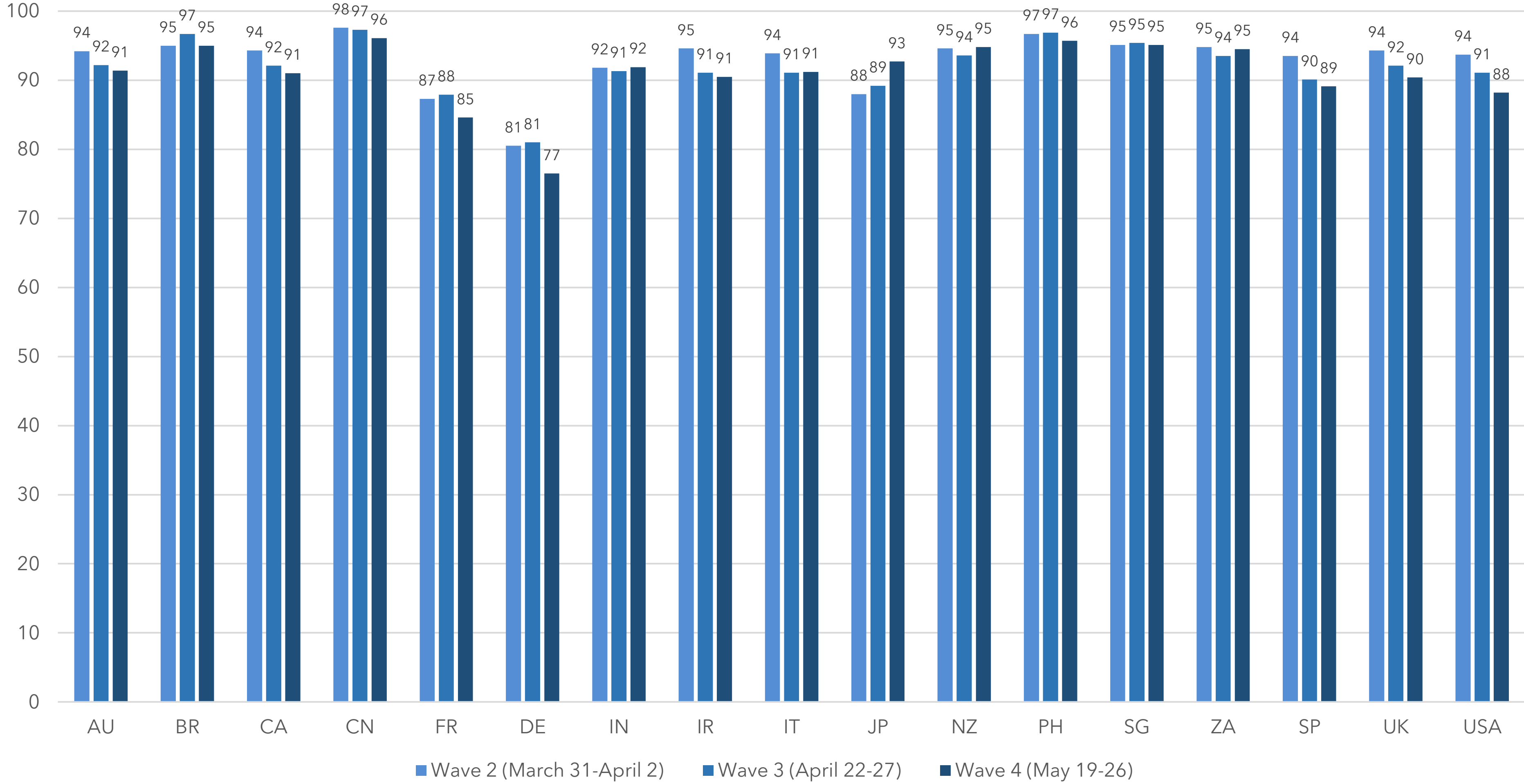
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly approve	38	35	32	30	34	34	38	32
Somewhat approve	42	45	42	38	44	42	41	41
Neither approve nor disapprove	12	14	20	24	17	15	15	17
Somewhat disapprove	5	4	4	4	3	5	4	7
Strongly disapprove	4	3	3	4	3	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? 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: Providing Entertaining Content

% who approve / disapprove of brands providing funny / light-hearted videos or content to entertain people

	All	AU	BE	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	30	27	25	47	31	23	29	21	41	29	37	20	28	34	34	33	23	42	35	25	32
Somewhat approve	45	41	37	32	35	55	33	39	41	39	37	42	41	50	40	39	52	36	36	40	32
Neither approve nor disapprove	19	27	27	17	26	19	28	23	10	21	19	30	25	10	18	20	22	15	22	29	27
Somewhat disapprove	4	3	5	2	4	3	4	7	5	7	4	4	4	4	4	6	3	4	3	3	4
Strongly disapprove	3	3	6	1	3	1	6	10	3	4	3	5	2	2	3	3	2	4	3	4	4

% who approve / disapprove of brands providing funny / light-hearted videos or content to entertain people*

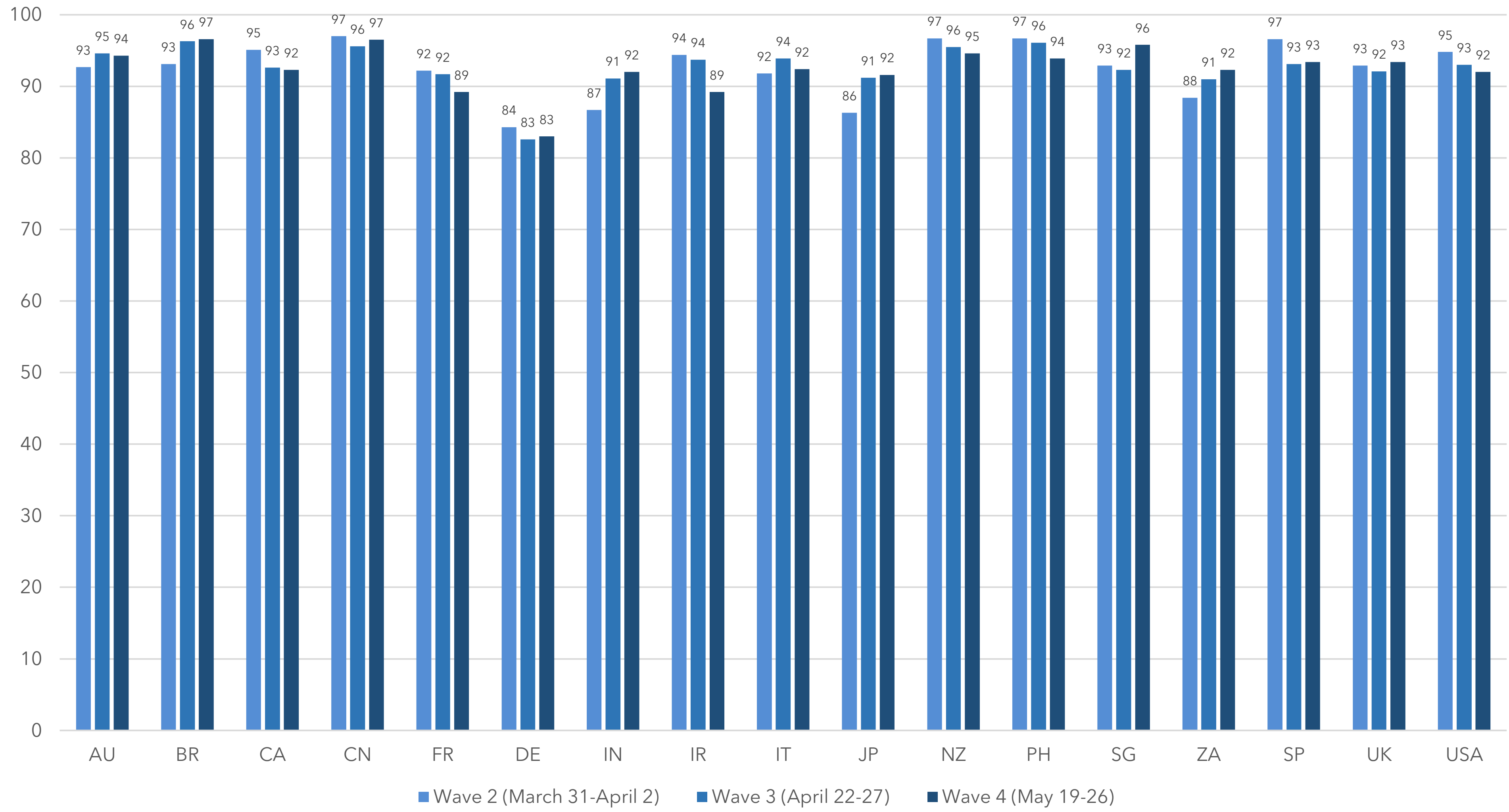
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly approve	33	31	28	29	32	29	33	28
Somewhat approve	45	47	43	36	45	45	44	44
Neither approve nor disapprove	17	15	24	28	19	19	17	21
Somewhat disapprove	3	4	3	4	3	4	4	4
Strongly disapprove	2	2	3	4	2	3	2	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? Providing funny / light-hearted videos or content to entertain people

Providing Entertaining Content – Trended Data

% who strongly or somewhat approve, or neither approve/disapprove, of brands providing funny / light-hearted videos or content to entertain people



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? Providing funny / light-hearted videos or content to entertain people. Chart illustrates combined responses for Strongly Approve, Somewhat Approve, Neither Approve nor Disapprove.

Levels of Approval for Brand Activities: Providing Practical Info / Tips

% who approve / disapprove of brands providing practical information / tips which help people to deal with the situation

	All	AU	BE	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	50	34	37	70	41	51	32	27	59	47	51	35	38	67	47	43	36	62	47	33	38
Somewhat approve	34	40	36	22	32	40	36	42	29	33	31	39	39	26	29	38	50	26	31	39	32
Neither approve nor disapprove	11	20	18	6	21	7	22	16	6	13	11	18	17	3	13	14	11	9	15	21	23
Somewhat disapprove	3	3	4	1	4	1	5	7	5	4	4	4	6	3	5	1	3	1	5	4	4
Strongly disapprove	2	4	4	1	3	1	6	7	2	3	3	3	1	1	5	3	1	2	3	4	3

% who approve / disapprove of brands providing practical information / tips which help people to deal with the situation*

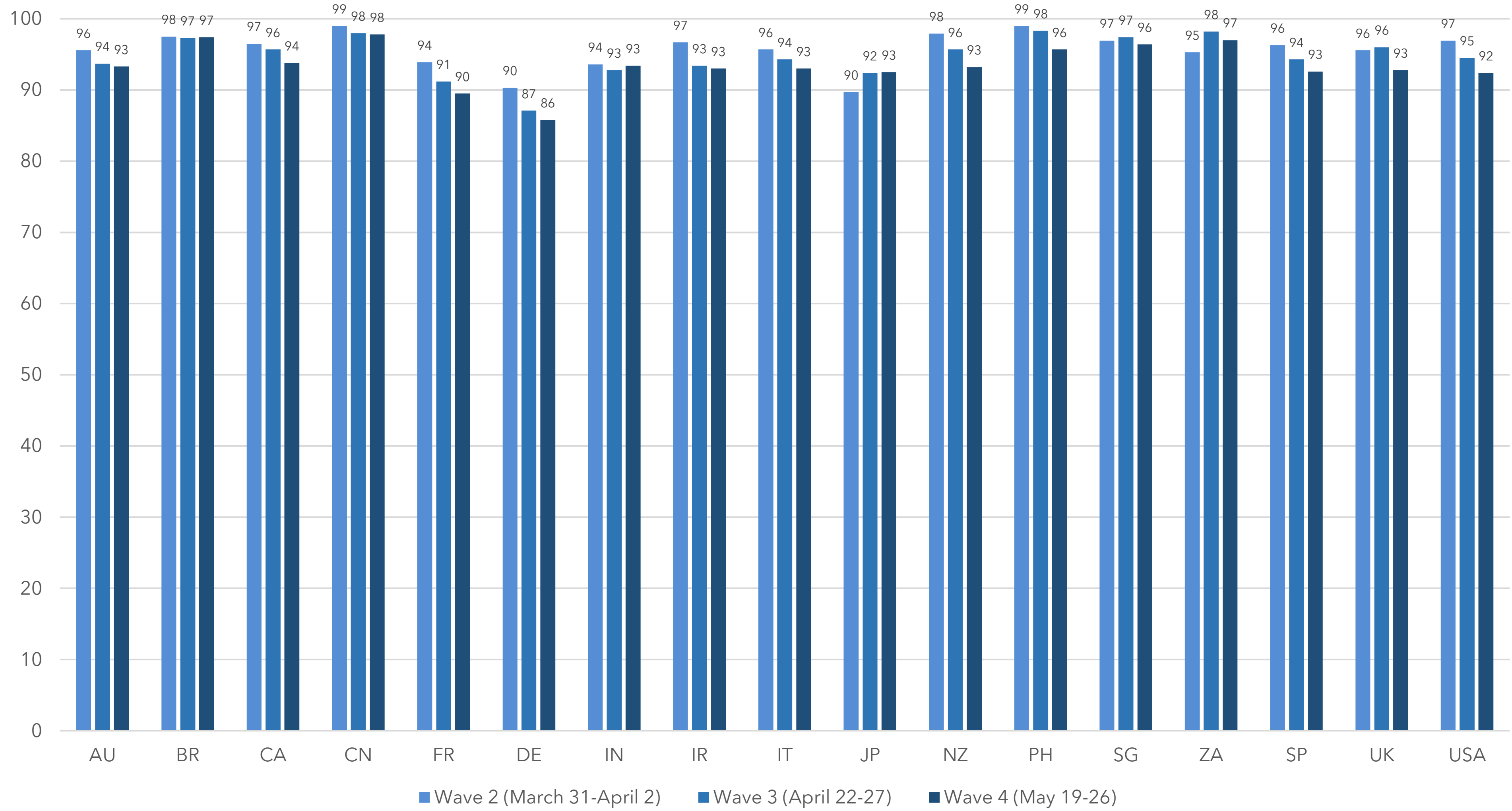
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly approve	52	52	47	45	51	50	55	43
Somewhat approve	33	34	35	34	35	34	32	36
Neither approve nor disapprove	9	8	14	16	11	10	9	13
Somewhat disapprove	4	3	2	2	2	4	2	4
Strongly disapprove	2	2	2	3	2	3	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? Providing practical information / tips which help people to deal with the situation

Providing Practical Info / Tips – Trended Data

% who strongly or somewhat approve, or neither approve/disapprove, of brands providing practical information / tips which help people to deal with the situation



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? Providing practical information / tips which help people to deal with the situation. 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	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	52	41	50	75	47	53	49	31	52	50	66	24	48	61	59	56	42	59	57	37	50
Somewhat approve	34	36	31	19	34	39	31	44	33	33	23	38	35	29	29	29	45	28	28	40	28
Neither approve nor disapprove	10	19	13	4	15	6	13	16	7	11	7	32	15	6	7	11	11	10	10	18	16
Somewhat disapprove	2	2	3	1	2	1	4	6	6	5	2	3	2	2	2	2	2	2	2	2	3
Strongly disapprove	2	2	3	1	1	1	3	4	3	1	3	3	0	2	2	2	1	1	3	3	3

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

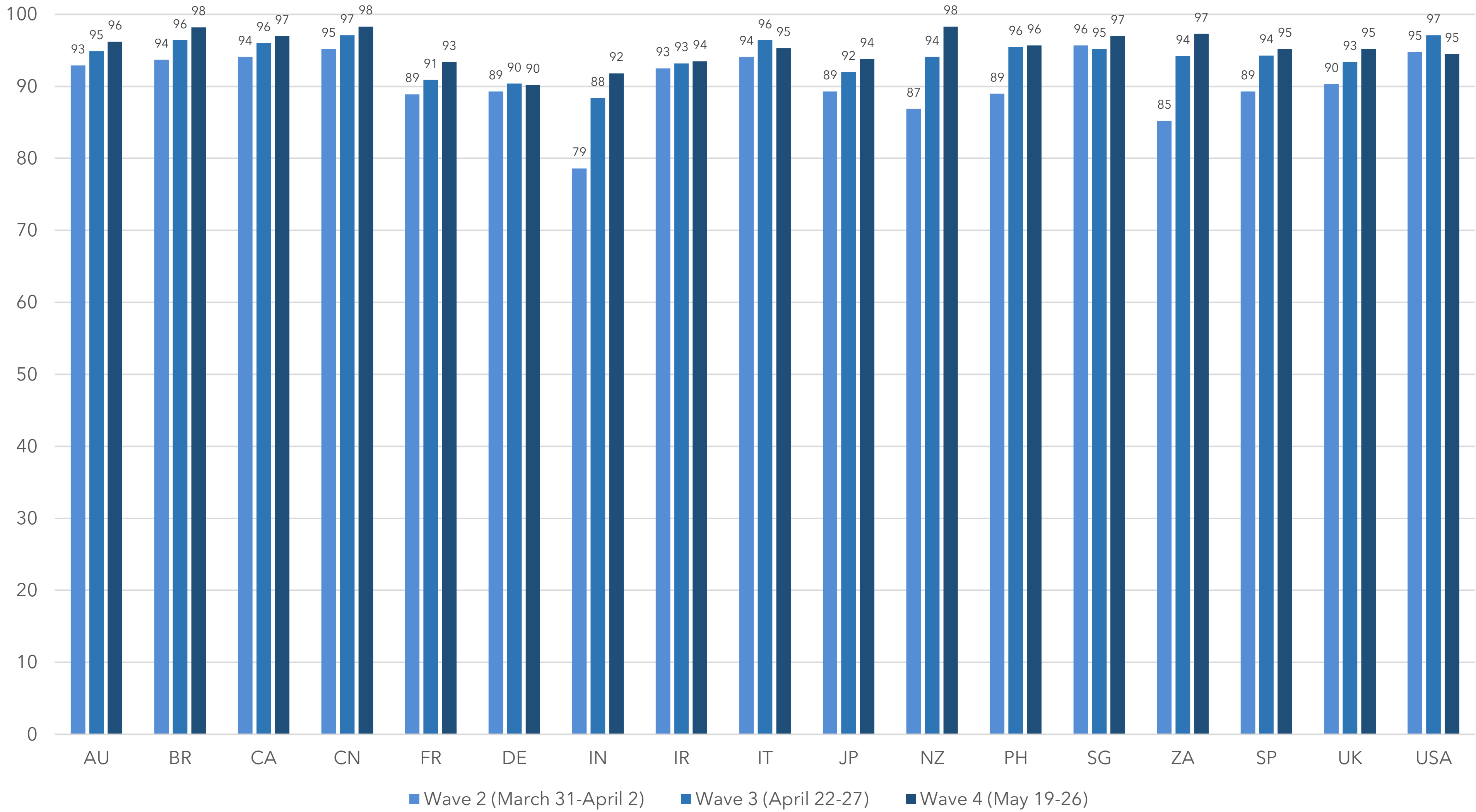
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly approve	52	53	51	49	55	50	55	49
Somewhat approve	34	35	34	33	33	35	34	32
Neither approve nor disapprove	8	8	11	16	9	10	8	12
Somewhat disapprove	4	3	2	1	2	3	2	5
Strongly disapprove	2	2	2	1	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	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	39	26	18	48	28	39	20	18	51	30	33	25	25	54	40	27	27	43	36	28	32
Somewhat approve	38	39	36	29	37	45	31	37	33	37	36	36	38	31	32	38	44	29	35	39	31
Neither approve nor disapprove	16	25	26	14	23	12	27	18	9	21	18	31	25	10	14	28	24	18	21	24	27
Somewhat disapprove	4	5	11	5	7	2	11	15	5	8	7	4	8	3	8	4	4	7	4	5	7
Strongly disapprove	3	6	8	4	5	2	12	12	2	5	6	3	4	1	6	4	2	4	4	4	3

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

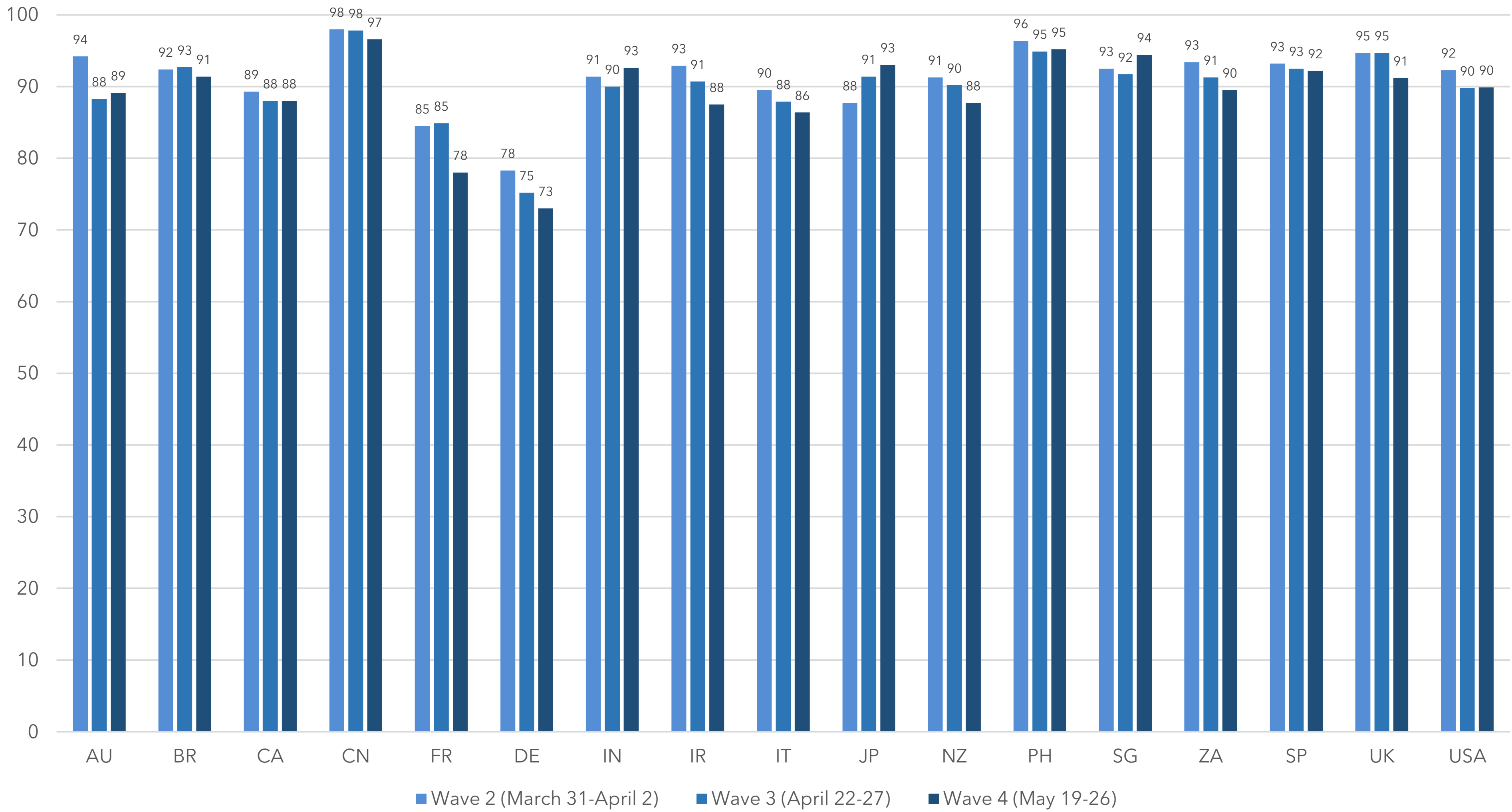
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly approve	42	42	34	30	37	41	43	38
Somewhat approve	36	39	39	34	39	37	37	36
Neither approve nor disapprove	14	13	19	25	17	15	14	17
Somewhat disapprove	4	4	4	5	4	5	4	6
Strongly disapprove	3	2	4	6	3	3	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	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	47	36	33	77	45	38	32	31	64	49	59	21	42	66	55	47	37	67	57	34	46
Somewhat approve	38	37	31	17	31	51	35	38	29	33	28	38	35	24	30	32	47	22	30	40	30
Neither approve nor disapprove	12	21	22	5	20	11	25	18	4	14	9	35	20	6	10	18	15	9	9	21	20
Somewhat disapprove	2	3	8	1	3	1	4	7	3	3	2	3	2	3	3	3	2	2	3	3	3
Strongly disapprove	1	3	6	1	2	1	3	6	1	1	1	3	2	1	2	1	0	1	1	1	1

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

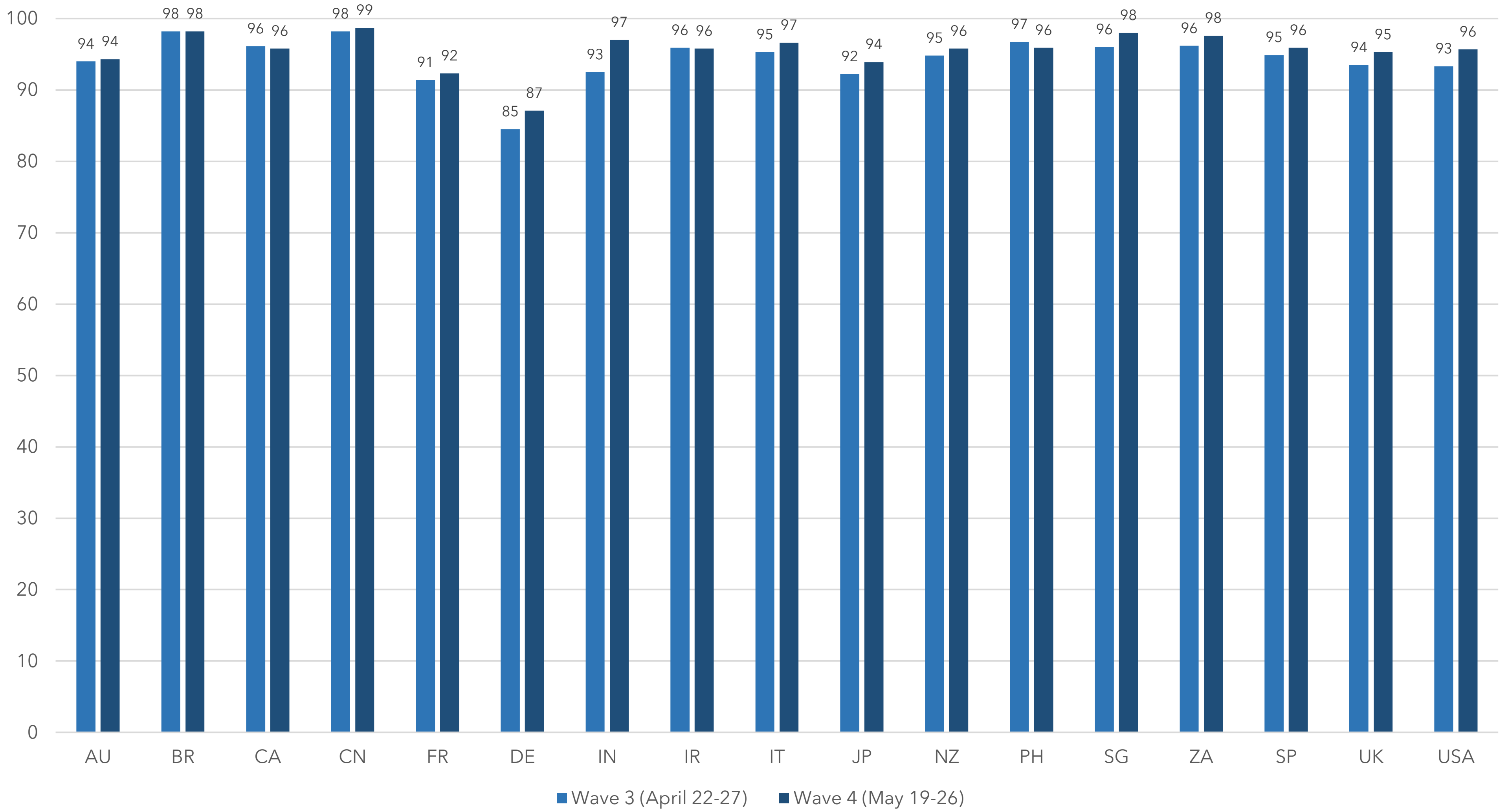
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly approve	55	48	42	38	47	47	50	44
Somewhat approve	35	40	38	33	38	38	36	40
Neither approve nor disapprove	7	10	17	23	12	12	11	12
Somewhat disapprove	3	2	2	3	2	2	2	3
Strongly disapprove	1	1	1	4	1	1	1	1

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

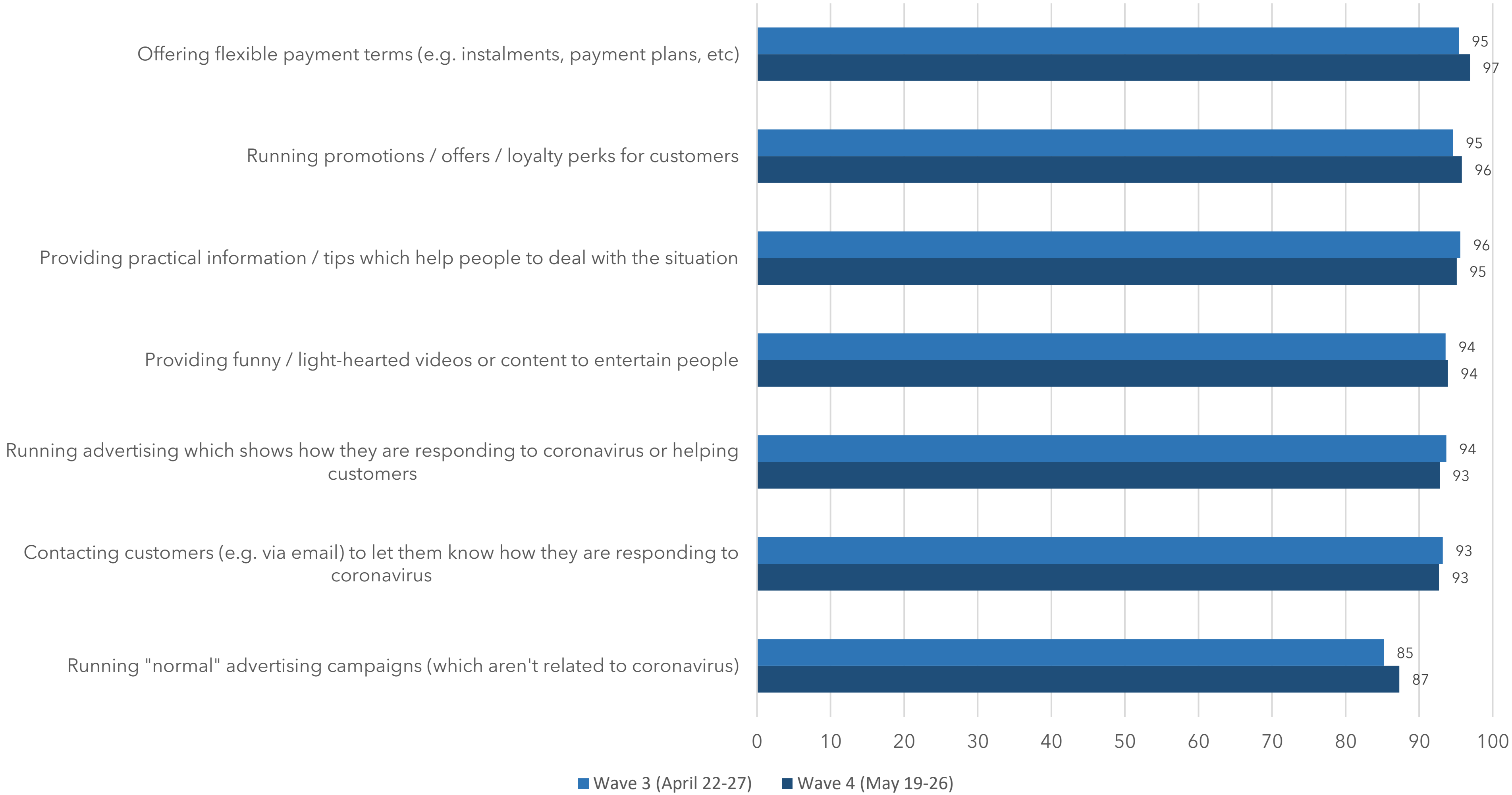
% who strongly or somewhat approve, or neither approve/disapprove, of brands contacting customers (e.g. via email) to let them know how they are responding to coronavirus



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? 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 Approval for Brand Activities – Ranked Activities

% who strongly or somewhat approve, or neither approve/disapprove, of brands doing the following at the moment



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? Chart illustrates combined responses for Strongly Approve, Somewhat Approve, Neither Approve nor Disapprove

Importance of Brands/Businesses Getting Back to Normal

% who say that brands / businesses getting back to normal has the following importance to them

	All	AU	BE	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Extremely important	24	19	12	27	18	14	16	17	40	27	44	30	19	29	34	25	17	33	20	24	25
Very important	35	36	32	32	30	37	33	32	37	30	35	36	36	26	38	38	31	33	37	30	29
Quite important	17	23	22	14	22	20	17	20	10	18	16	11	24	25	13	27	27	19	23	20	15
A little important	15	14	19	13	17	19	15	17	7	17	1	14	13	14	6	6	13	7	13	14	16
Not very important	8	6	11	10	9	8	14	11	5	7	3	5	7	5	7	3	9	6	6	8	10
Not important at all	2	2	4	4	5	1	5	4	1	1	1	4	1	1	2	2	2	2	2	3	6

% who say that brands / businesses getting back to normal has the following importance to them*

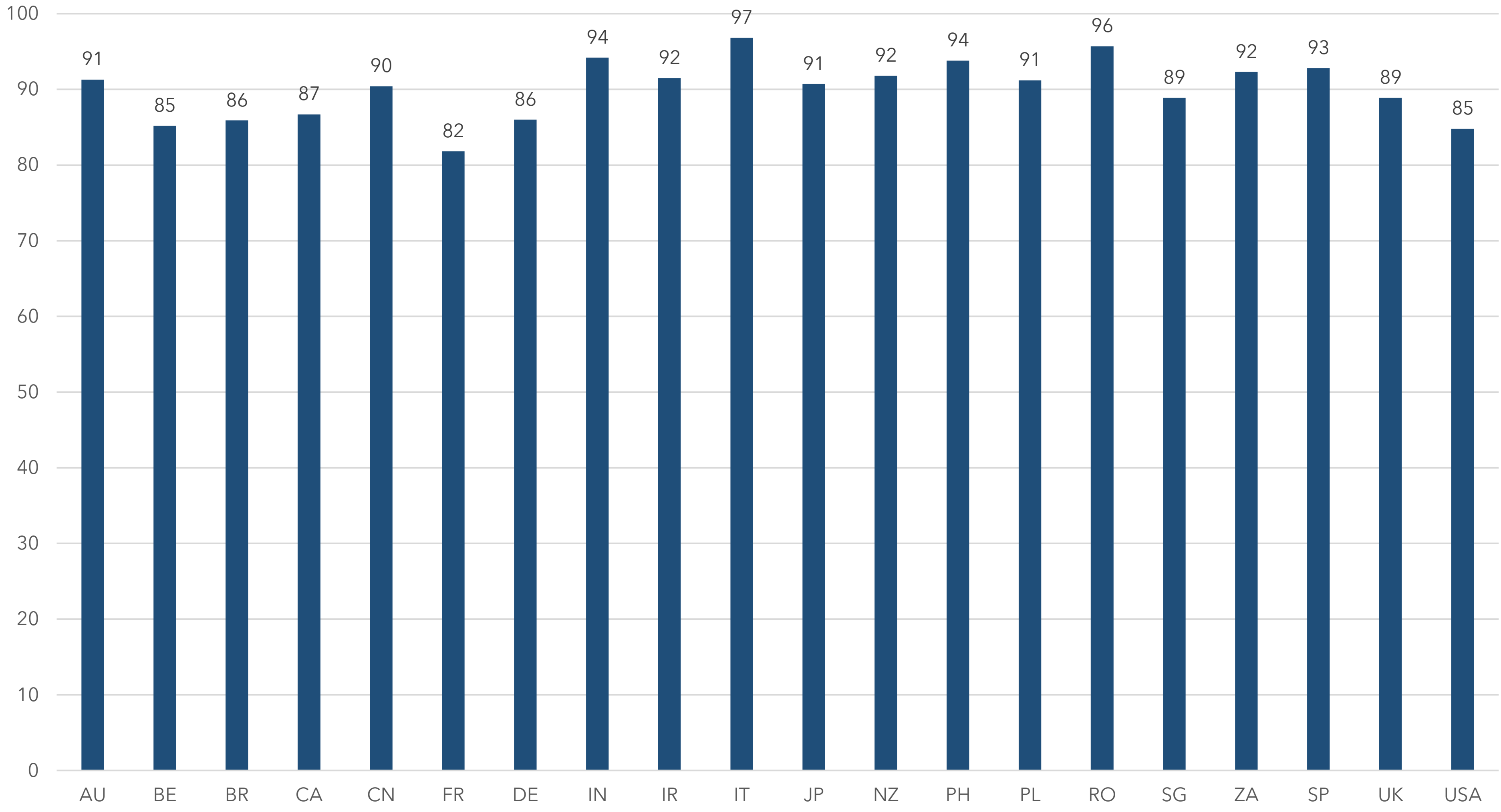
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Extremely important	24	24	23	25	22	25	29	22
Very important	34	35	34	35	31	38	35	34
Quite important	15	16	20	19	18	16	17	18
A little important	15	15	14	12	18	12	12	13
Not very important	10	8	7	6	9	7	5	10
Not important at all	2	2	3	3	2	2	2	3

Question: How important are these things for you? Brands / businesses getting back to normal (e.g. opening shops, running regular advertising, etc).

Importance of Brands / Businesses Getting Back to Normal

% who say that brands / businesses getting back to normal (e. g. opening shops, running regular advertising, etc) is important



Question: How important are these things for you? Brands / businesses getting back to normal (e.g. opening shops, running regular advertising, etc). Chart combines answers for Extremely important, Very important, Quite important, A little important

Importance of Sports Resuming

% who say that sports leagues / competitions resuming has the following importance to them

	All	AU	BE	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Extremely important	11	14	6	12	10	6	8	9	21	11	8	17	8	7	18	14	7	14	6	12	14
Very important	19	18	16	18	17	17	15	16	26	16	16	28	15	7	24	21	10	20	14	19	19
Quite important	15	15	14	14	13	17	12	13	14	13	20	9	15	14	9	22	14	18	12	11	12
A little important	17	17	16	12	16	19	15	14	15	19	18	22	16	20	19	19	18	15	16	14	16
Not very important	22	15	21	19	15	29	22	23	15	19	16	13	23	33	15	10	28	19	21	17	15
Not important at all	16	22	26	25	29	13	28	25	8	22	23	11	24	20	14	15	23	15	31	27	25

% who say that sports leagues / competitions resuming has the following importance to them*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Extremely important	12	11	11	11	9	13	13	13
Very important	17	21	17	19	16	22	22	21
Quite important	15	15	15	13	13	16	15	14
A little important	16	17	18	17	17	17	19	14
Not very important	25	21	22	20	24	20	18	21
Not important at all	15	15	18	21	21	12	12	17

Question: How important are these things for you? Sports leagues / competitions resuming.

Importance of Restaurants, Cafes and Bars Reopening

% who say that the reopening of restaurants, cafes and bars has the following importance to them

	All	AU	BE	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Extremely important	16	21	17	20	15	8	22	18	23	18	25	26	18	13	26	19	14	17	16	18	24
Very important	26	30	25	27	24	26	28	25	25	24	35	33	24	16	33	20	26	22	32	27	24
Quite important	18	22	23	17	23	18	16	19	16	16	26	11	24	29	15	29	26	21	19	20	17
A little important	21	17	17	17	20	25	16	18	19	25	8	18	22	24	13	17	21	18	21	19	18
Not very important	14	6	12	12	13	19	10	14	12	12	5	7	8	13	11	11	11	16	9	10	11
Not important at all	5	4	6	7	6	4	8	7	5	6	2	6	4	5	2	5	2	6	4	6	7

% who say that the reopening of restaurants, cafes and bars has the following importance to them*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Extremely important	15	16	17	18	15	17	19	15
Very important	26	27	25	27	25	27	30	25
Quite important	16	19	17	18	17	19	18	16
A little important	23	20	21	20	23	19	19	22
Not very important	15	13	15	11	15	14	11	17
Not important at all	5	5	5	6	6	5	3	6

Question: How important are these things for you? Restaurants, cafes and bars reopening.

Safety Factors in Public Spaces

% who say the following factors are most important to them in public spaces

	All	AU	BE	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Cashless payment options	40	35	30	29	27	42	22	32	59	45	25	20	45	47	43	33	40	48	25	39	25
Longer opening / operation hours	19	19	17	18	20	17	22	16	25	25	26	12	14	23	26	31	16	26	18	20	13
Mandatory usage of face masks	53	12	43	60	35	54	51	32	60	28	56	46	13	75	36	49	58	65	61	25	47
Mandatory usage of gloves	22	11	12	20	18	13	12	12	46	16	32	10	11	32	28	24	13	25	23	18	21
Provision of hand sanitizer	57	54	49	61	51	59	57	45	63	61	54	46	52	74	53	46	47	71	55	47	47
Regular cleaning / disinfecting of spaces	68	65	55	74	68	77	55	48	62	68	61	32	64	82	58	66	64	73	65	60	64
Restrictions on how many people can enter	46	41	47	49	48	48	37	37	50	58	37	29	44	65	33	38	46	58	44	49	41
Self-service payment options	33	27	14	28	25	40	12	14	40	29	22	15	29	33	30	28	27	41	15	25	21
Social distancing measures	58	64	55	57	64	52	52	34	74	74	55	40	62	65	41	58	67	72	59	64	61
None of these	4	8	10	2	8	2	9	15	1	2	6	12	8	1	7	5	3	2	4	8	10

Question: Thinking about public spaces (e.g. shops, leisure venues, public transport, etc), which of these factors are most important to you?

Safety Factors in Public Spaces

% who say the following factors are most important to them in public spaces*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Cashless payment options	41	42	38	30	36	43	42	35
Longer opening / operation hours	18	20	18	14	18	19	21	19
Mandatory usage of face masks	54	52	53	53	54	52	56	49
Mandatory usage of gloves	27	21	20	20	20	23	23	22
Provision of hand sanitizer	60	57	56	57	61	54	60	54
Regular cleaning / disinfecting of spaces	66	66	71	70	73	64	69	57
Restrictions on how many people can enter	46	46	47	49	48	45	48	39
Self-service payment options	34	35	29	21	34	32	35	29
Social distancing measures	59	56	59	61	58	58	60	55
None of these	2	4	5	9	4	4	4	5

Question: Thinking about public spaces (e.g. shops, leisure venues, public transport, etc), which of these factors are most important to you?

Speed of Returning to Locations: Shops

% who say that, once they re-open, they will start visiting shops within the following time-period

	All	AU	BE	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Immediately	13	15	5	10	9	12	10	21	18	10	9	7	12	5	20	14	10	15	9	16	12
Very quickly	23	23	12	10	15	31	16	17	25	20	15	23	17	6	23	15	17	16	12	17	16
Quite quickly	16	28	14	15	20	12	19	21	18	26	14	7	31	14	28	29	29	24	20	26	17
Not for some time	32	17	45	39	35	30	31	26	30	30	43	39	29	56	16	30	32	31	37	24	32
Not for a long time	8	2	14	14	10	8	13	7	5	6	11	7	3	9	4	4	5	5	10	8	10
Not sure	9	14	9	13	11	8	11	8	4	9	9	18	7	9	9	9	7	9	12	10	13

% who say that, once they re-open, they will start visiting shops within the following time-period*

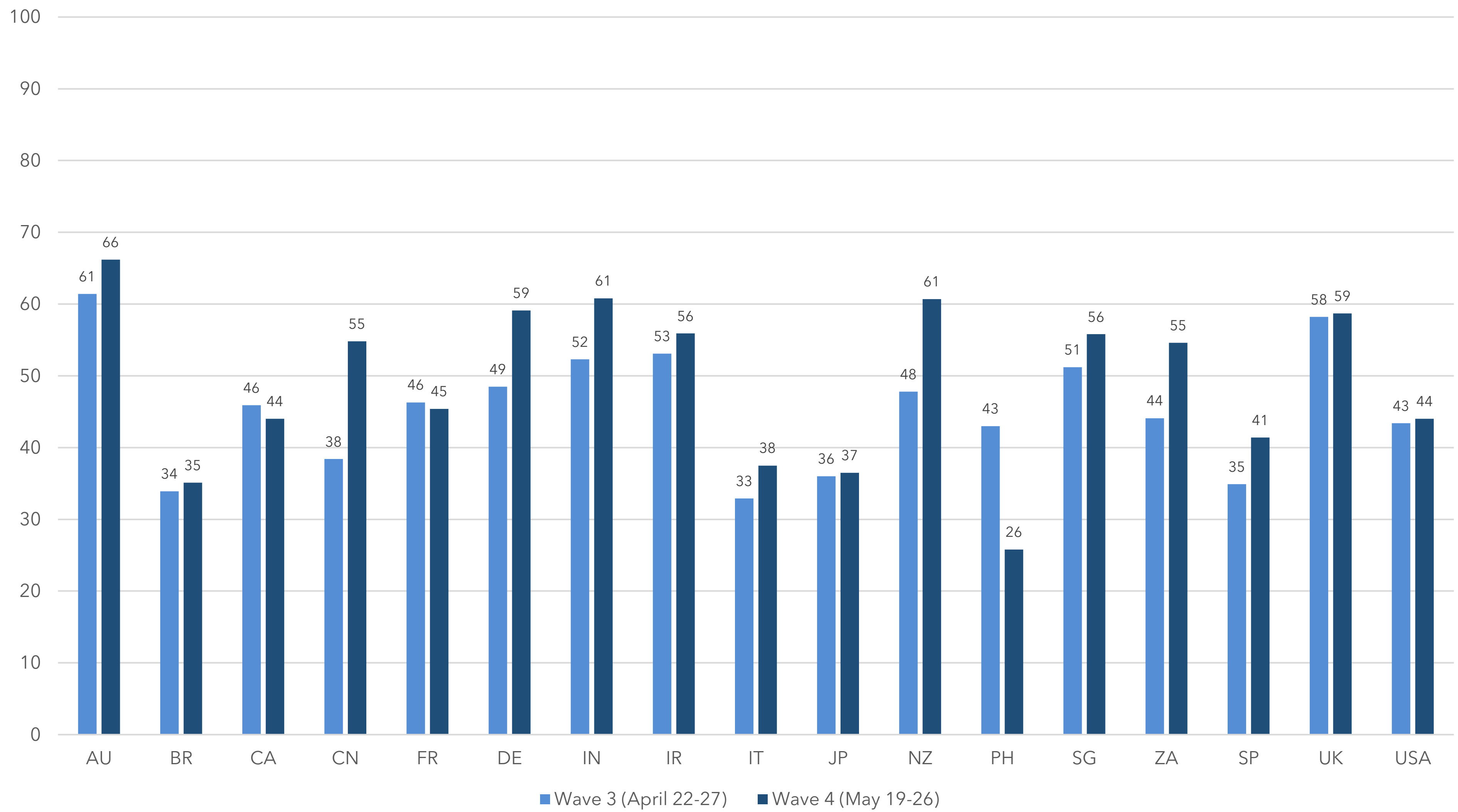
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Immediately	11	15	11	11	11	15	16	13
Very quickly	26	25	21	13	21	25	24	23
Quite quickly	15	16	15	20	14	17	14	14
Not for some time	33	31	33	34	36	28	32	28
Not for a long time	9	8	8	8	9	7	8	10
Not sure	7	7	12	14	10	8	6	12

Question: Once the following re-open, how quickly would you start visiting them again? Shops

Speed of Returning to Shops – Trended Data

% who say that, once they re-open, they will start visiting shops immediately, very quickly, or quite quickly



Question: Once the following re-open, how quickly would you start visiting them again? Shops. Chart illustrates combined responses for Immediately, Very Quickly, and Quite Quickly

Speed of Returning to Locations: Indoor Venues

% who say that, once they re-open, they will start visiting large indoor venues within the following time-period

	All	AU	BE	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Immediately	6	6	3	7	6	4	6	7	10	4	5	4	3	2	7	7	4	7	5	9	8
Very quickly	11	10	7	9	9	11	11	9	16	6	7	12	7	3	16	7	8	6	8	9	9
Quite quickly	8	15	7	11	8	7	10	9	11	7	7	3	12	5	18	12	10	8	9	12	8
Not for some time	33	31	33	34	28	37	26	26	27	39	29	34	38	41	23	45	38	27	39	30	28
Not for a long time	30	21	34	26	35	29	34	38	29	33	38	30	24	33	21	17	31	40	27	28	34
Not sure	12	17	16	13	14	12	13	12	7	12	15	17	16	16	15	12	8	12	12	12	14

% who say that, once they re-open, they will start visiting large indoor venues within the following time-period*

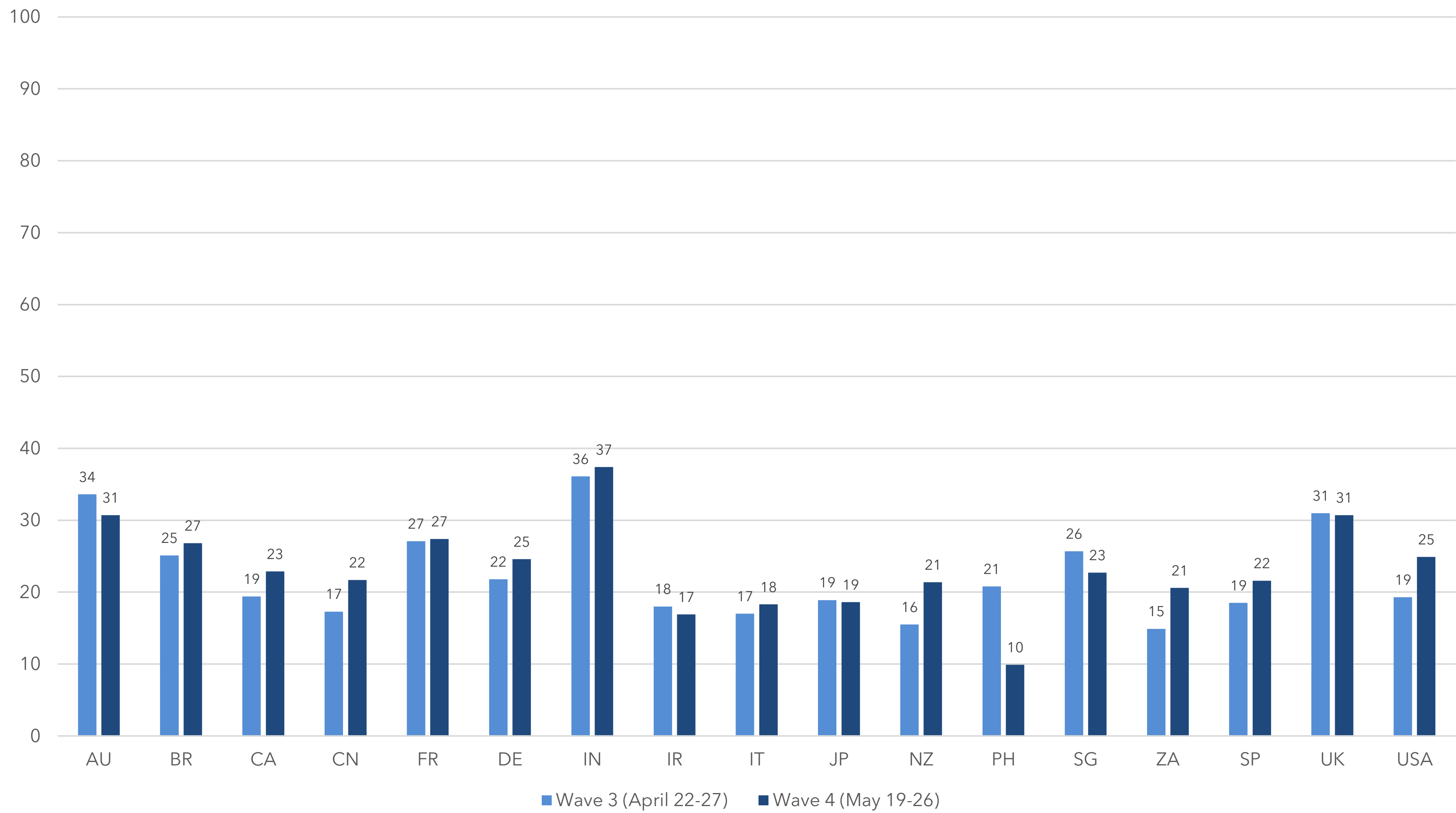
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Immediately	5	8	4	4	5	7	7	6
Very quickly	12	14	8	6	9	13	13	13
Quite quickly	9	9	6	6	7	9	9	8
Not for some time	31	33	33	33	33	32	33	28
Not for a long time	32	27	33	34	33	28	30	29
Not sure	11	10	15	18	13	11	9	17

Question: Once the following re-open, how quickly would you start visiting them again? Large indoor venues (e.g. sports arenas, concert halls, cinema complexes, etc)

Speed of Returning to Indoor Venues – Trended Data

% who say that, once they re-open, they will start visiting large indoor venues immediately, very quickly, or quite quickly



Question: Once the following re-open, how quickly would you start visiting them again? Large indoor venues (e.g. sports arenas, concert halls, cinema complexes, etc). Chart illustrates combined responses for Immediately, Very Quickly, and Quite Quickly

Speed of Returning to Locations: Outdoor Venues

% who say that, once they re-open, they will start visiting large outdoor venues within the following time-period

	All	AU	BE	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Immediately	7	7	4	10	5	5	7	9	12	4	6	4	4	3	10	8	5	5	6	9	9
Very quickly	12	9	5	9	9	14	12	9	13	7	8	8	5	2	15	8	7	7	8	9	10
Quite quickly	9	12	8	15	8	9	12	7	10	5	7	3	8	4	14	14	8	10	10	9	9
Not for some time	31	29	25	33	26	35	23	24	27	35	24	32	35	40	27	42	37	30	38	27	24
Not for a long time	27	23	38	20	37	22	32	39	31	33	39	34	31	35	17	16	34	35	25	30	32
Not sure	14	20	20	13	15	16	15	12	7	16	17	18	17	16	17	12	9	14	14	16	16

% who say that, once they re-open, they will start visiting large outdoor venues within the following time-period*

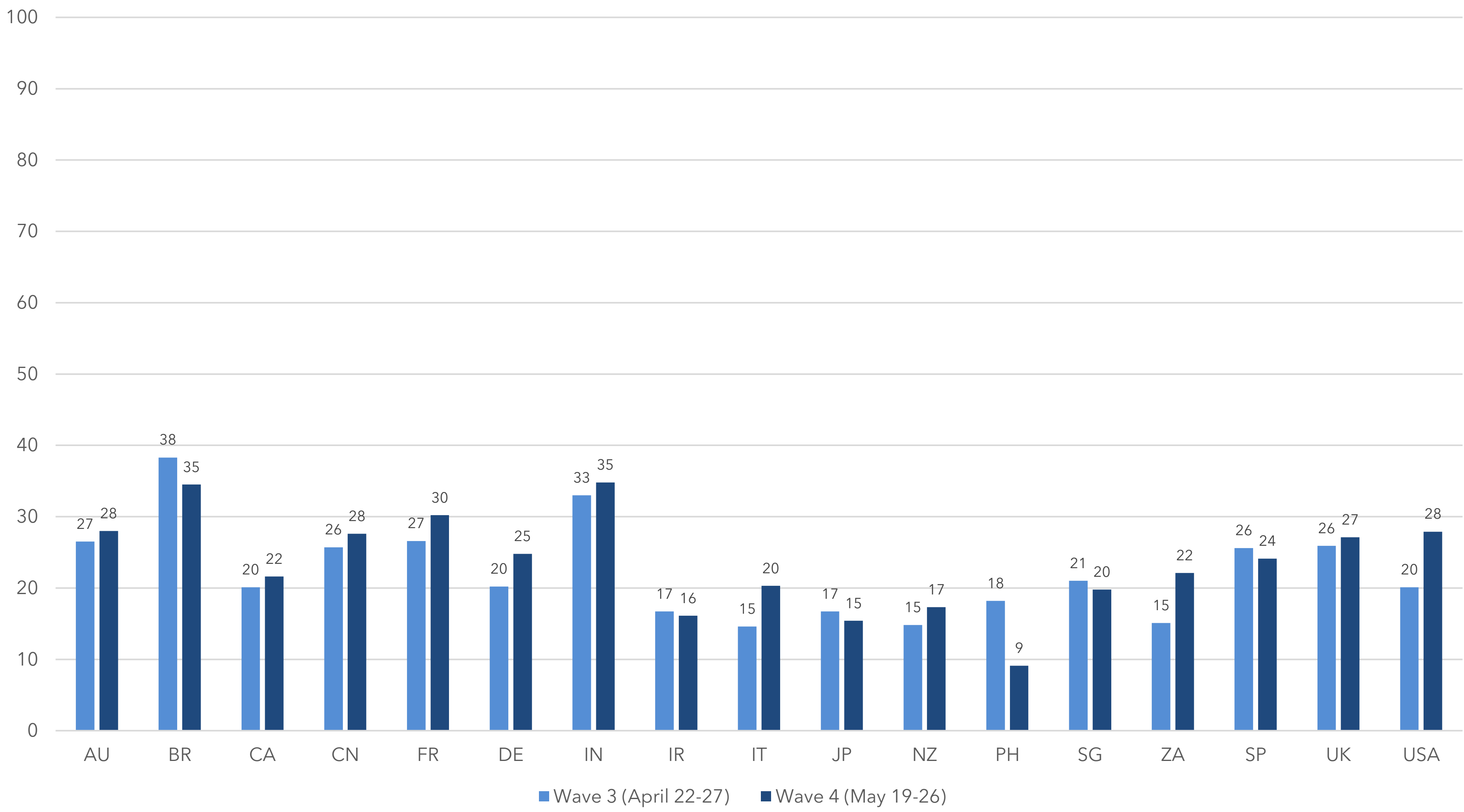
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Immediately	7	9	5	4	6	8	9	7
Very quickly	10	14	10	6	9	14	12	14
Quite quickly	9	11	8	8	8	10	10	8
Not for some time	34	31	30	27	32	30	34	27
Not for a long time	28	24	29	35	29	25	26	25
Not sure	12	12	18	20	16	12	9	19

Question: Once the following re-open, how quickly would you start visiting them again? Large outdoor venues (e.g. sports stadiums, music festivals, etc)

Speed of Returning to Outdoor Venues – Trended Data

% who say that, once they re-open, they will start visiting large outdoor venues immediately, very quickly, or quite quickly



Question: Once the following re-open, how quickly would you start visiting them again? Large outdoor venues (e.g. sports stadiums, music festivals, etc). Chart illustrates combined responses for Immediately, Very Quickly, and Quite Quickly

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	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Cruise	4	3	2	2	4	2	4	4	8	3	4	1	3	2	3	1	5	8	2	3	6
Domestic vacation in your country	49	50	27	40	27	55	42	38	50	40	47	30	59	43	51	49	16	40	54	41	46
Foreign long-haul vacation (i.e. in a different part of the world)	9	12	10	11	12	6	7	11	13	15	6	4	8	7	6	8	20	10	7	18	11
Foreign short-haul vacation (i.e. in a nearby country)	12	10	29	9	12	11	17	25	15	25	13	3	14	8	13	14	35	8	12	25	10
Staycation in your local area	30	21	11	24	26	40	16	16	23	15	20	40	18	29	22	18	14	18	21	16	20
I'm not planning on taking any vacations	28	32	41	28	39	23	32	32	28	28	26	38	26	31	25	27	34	36	24	29	33

% 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	4	5	2	3	4	4	5	4
Domestic vacation in your country	45	51	48	45	46	51	56	35
Foreign long-haul vacation (i.e. in a different part of the world)	5	11	6	9	7	10	15	5
Foreign short-haul vacation (i.e. in a nearby country)	11	16	9	9	11	13	18	9
Staycation in your local area	24	33	30	21	30	29	32	23
I'm not planning on taking any vacations	32	23	31	34	30	26	20	38

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

Important Vacation Factors

% who say the following will be important to them in their next vacation

	All	AU	BE	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Booking with a brand I trust	16	11	8	12	9	19	11	8	24	14	6	10	9	9	9	7	14	16	8	15	11
Feeling safe	63	49	45	53	51	73	45	44	64	61	52	49	49	65	53	53	66	53	49	53	54
Flexible cancellation policies	17	17	18	12	22	14	17	18	25	19	15	9	21	13	13	11	27	14	19	24	23
Going somewhere I've been before	10	10	10	11	11	6	10	14	15	7	7	7	10	6	10	10	11	8	10	10	15
Going somewhere new	18	13	11	21	13	19	18	10	23	13	12	10	16	25	18	17	15	20	14	15	13
Price	31	40	36	43	41	26	38	30	32	35	36	23	48	31	41	36	43	40	32	32	35
Relaxation	48	36	35	39	35	57	23	51	47	28	43	47	37	48	45	46	41	45	37	35	38
Other	4	7	11	5	8	3	10	7	4	3	4	9	6	5	6	4	3	6	6	8	5

Question: What will be most important to you in the next vacation you take?

Important Vacation Factors

% who say the following will be important to them in their next vacation*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Booking with a brand I trust	14	20	14	9	14	18	20	12
Feeling safe	62	63	64	56	64	62	66	55
Flexible cancellation policies	17	18	16	19	17	17	24	10
Going somewhere I've been before	11	10	8	10	8	10	12	9
Going somewhere new	22	19	16	14	17	19	20	19
Price	34	30	31	29	31	31	26	35
Relaxation	43	52	47	40	47	50	49	44
Other	5	3	5	9	5	4	3	7

Question: What will be most important to you in the next vacation you take?

Post-Outbreak Leisure Behaviors

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

	All	AU	BE	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Cancel a gym membership	10	5	5	7	10	10	5	8	17	9	8	4	8	14	5	7	8	10	9	7	10
Eat out at restaurants less often	40	25	19	36	35	39	18	38	56	37	33	18	33	54	19	29	40	48	40	31	39
Eat at fast-food outlets less often	30	17	15	28	22	27	21	25	50	29	22	12	33	51	19	28	27	38	30	21	24
Visit bars / pubs less often	29	19	16	27	21	31	16	32	32	40	24	10	27	43	18	28	24	39	37	31	22
Visit the cinema less often	34	20	12	30	23	34	16	32	54	25	21	11	18	45	13	16	31	35	31	21	27
None of these	33	59	66	37	49	31	60	42	12	33	47	68	48	17	61	43	37	27	36	48	43

% 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	10	10	5	10	10	11	11
Eat out at restaurants less often	43	41	38	38	42	39	42	37
Eat at fast-food outlets less often	37	31	27	22	30	31	30	31
Visit bars / pubs less often	25	31	29	22	27	30	34	23
Visit the cinema less often	42	34	32	22	33	35	34	32
None of these	24	31	40	52	34	33	32	35

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.

Post-Outbreak Behavior Increases

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

	All	AU	BE	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Exercise at home more frequently	42	27	15	38	27	50	22	24	51	36	29	19	30	60	29	31	27	49	31	26	30
Shop online more frequently	46	29	27	48	33	52	24	30	58	38	37	23	33	48	46	38	38	48	35	32	32
Use food delivery services more frequently (e.g. Uber Eats, Just Eat, Deliveroo, etc)	21	9	5	39	11	19	8	11	37	9	15	6	8	32	10	10	21	37	14	12	11
Use mobile payment services more frequently	37	11	17	33	15	45	11	20	57	20	11	3	14	55	25	33	26	42	19	13	16
Use video calling more frequently (e.g. FaceTime, WhatsApp video, etc)	32	18	18	33	21	35	17	19	48	29	25	3	21	33	16	21	24	40	32	26	19
Use video conferencing platforms more frequently (e.g. Zoom, Hangouts, etc)	25	15	10	20	17	24	11	15	42	25	14	9	23	28	10	13	25	30	19	16	20
Work from home more frequently	25	21	20	32	26	15	18	22	47	26	21	11	26	48	24	26	35	38	25	23	22
None of these	17	37	40	12	33	11	41	32	3	21	25	54	29	5	27	24	22	10	23	29	31

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	45	46	38	24	44	41	45	38
Shop online more frequently	49	47	44	36	46	46	50	40
Use food delivery services more frequently (e.g. Uber Eats, Just Eat, Deliveroo, etc)	29	24	16	8	20	23	25	18
Use mobile payment services more frequently	46	39	32	19	33	40	36	35
Use video calling more frequently (e.g. FaceTime, WhatsApp video, etc)	33	36	29	20	30	34	37	28
Use video conferencing platforms more frequently (e.g. Zoom, Hangouts, etc)	30	27	21	12	23	26	31	20
Work from home more frequently	30	25	22	18	23	27	31	21
None of these	11	13	22	40	18	16	13	20

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

Alcohol Behaviors

% who say their alcohol consumption has changed in the following ways

	All	AU	BE	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Drunk alcohol at times of day I wouldn't normally	12	7	8	14	9	15	7	5	13	11	5	9	7	7	9	13	10	7	10	11	10
Drunk more alcohol overall than I normally would	14	16	15	17	15	15	11	11	14	18	8	11	17	4	11	13	11	5	13	19	17
Purchased alcohol from a local bar / café / restaurant to take home	7	3	4	8	4	5	2	4	16	2	4	2	1	5	5	5	4	5	4	4	7
Purchased more alcohol for home delivery	11	6	4	13	6	15	4	5	14	7	5	6	5	5	5	6	10	4	6	10	7
Tried new brands of alcohol	12	6	7	11	10	16	5	6	13	7	6	8	4	6	15	9	10	10	9	10	8
Tried new types of alcohol	12	7	6	10	6	15	4	6	14	7	4	6	3	7	15	5	9	10	6	8	9
None of these	26	47	43	27	41	23	48	50	11	45	49	35	44	22	36	38	29	39	41	44	34
Do not drink alcohol	34	25	27	30	27	31	29	26	51	17	27	36	27	56	23	28	38	37	26	19	28

Question: Has your alcohol consumption changed in any of these ways during the coronavirus outbreak? (Asked to those 18+ only, or 21+ in the U.S.)

Alcohol Behaviors

% who say their alcohol consumption has changed in the following ways*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Drunk alcohol at times of day I wouldn't normally	11	15	11	6	12	13	16	12
Drunk more alcohol overall than I normally would	13	15	14	10	12	16	17	12
Purchased alcohol from a local bar / café / restaurant to take home	8	9	4	2	5	9	9	7
Purchased more alcohol for home delivery	8	15	9	5	10	12	17	9
Tried new brands of alcohol	11	16	9	6	12	12	18	10
Tried new types of alcohol	9	15	9	4	11	12	17	9
None of these	17	23	34	45	27	26	25	22
Do not drink alcohol	48	30	32	33	38	31	24	43

Question: Has your alcohol consumption changed in any of these ways during the coronavirus outbreak? (Asked to those 18+ only, or 21+ in the U.S.)

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	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
A lot more important	42	24	22	54	23	41	27	19	58	37	42	32	26	67	26	38	33	45	35	26	30
A little more important	32	31	30	24	27	40	32	30	29	25	25	33	28	22	28	25	37	29	31	25	23
No change	20	40	41	18	43	16	36	40	5	33	26	28	41	9	39	32	25	21	28	42	38
A little less important	3	2	5	2	3	2	4	5	5	5	6	3	4	2	3	5	4	3	4	5	5
A lot less important	2	3	3	1	4	1	2	6	3	1	2	5	2	1	4	0	2	2	2	3	4

% 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	45	45	38	32	41	43	47	39
A little more important	34	34	30	27	32	33	31	32
No change	14	16	28	38	23	18	17	21
A little less important	5	3	2	2	3	3	3	5
A lot less important	3	2	3	2	1	3	2	3

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

Changing Importance: Reducing Single-Use Plastic Consumption

% who say that reducing the amount of single-use plastic they use has taken on the following importance because of coronavirus

	All	AU	BE	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
A lot more important	37	23	25	52	24	32	27	17	54	35	49	19	27	58	31	43	30	37	37	24	26
A little more important	31	26	26	24	22	41	27	28	28	23	18	29	18	29	26	19	35	27	28	20	21
No change	24	44	40	18	45	22	37	42	6	35	24	37	44	9	36	32	28	26	28	46	43
A little less important	5	4	6	3	5	4	5	5	9	5	6	8	5	3	4	5	5	6	3	6	4
A lot less important	3	3	3	3	5	2	4	8	3	2	4	8	6	1	3	2	3	4	3	4	6

% who say that reducing the amount of single-use plastic they use 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	39	39	33	30	37	36	41	34
A little more important	35	33	29	22	30	33	32	31
No change	15	21	31	41	25	23	20	25
A little less important	6	5	4	3	4	5	4	6
A lot less important	4	3	4	3	3	4	3	5

Question: Has the importance of any of these things changed for you, because of coronavirus? Reducing how much single-use plastic I use

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	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
A lot more important	40	21	24	54	22	38	27	16	56	36	52	22	26	60	28	46	33	42	37	23	28
A little more important	29	28	25	24	24	36	26	27	25	25	17	30	20	26	26	17	36	27	28	22	20
No change	23	43	44	18	45	21	37	42	6	32	23	35	45	9	38	27	25	23	27	45	43
A little less important	5	4	3	3	5	3	6	7	10	5	5	6	5	4	5	8	5	6	5	6	4
A lot less important	3	4	5	2	5	2	4	7	4	3	3	7	4	1	4	3	2	1	3	3	5

% 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	42	43	35	31	39	41	45	38
A little more important	31	29	28	24	29	29	28	26
No change	16	19	30	40	25	22	21	23
A little less important	7	6	4	2	4	6	5	8
A lot less important	4	3	3	3	2	4	2	4

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

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	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Creating / uploading videos (e.g. on YouTube, TikTok, etc)	15	6	6	24	7	14	8	5	28	8	12	3	8	25	9	11	11	16	14	6	10
Listening to more podcasts	15	15	10	19	14	9	9	11	24	16	9	6	11	18	13	14	12	19	15	13	18
Listening to more radio	20	19	18	21	21	15	20	26	25	29	26	10	18	29	37	23	27	34	28	28	16
Listening to more streaming services (e.g. Spotify, Apple Music, etc)	37	22	14	42	21	44	18	17	50	26	23	9	20	41	19	17	26	36	26	22	24
Reading more books / listening to more audiobooks	34	22	21	35	21	37	22	26	42	31	33	19	24	30	35	31	25	40	38	31	24
Reading more magazines	16	8	7	12	9	13	13	12	31	10	17	7	6	11	18	8	11	12	12	11	12
Reading more newspapers	18	12	11	16	11	11	15	17	42	12	19	14	8	22	16	8	30	18	20	12	13
Spending longer on messaging services (e.g. WhatsApp, Facebook Messenger, etc)	43	25	29	56	25	48	29	28	55	41	53	6	33	57	37	42	44	60	53	34	20
Spending longer on social media (e.g. Facebook, Instagram, Twitter, etc)	42	29	30	56	33	40	33	23	56	38	43	20	40	67	46	47	41	57	44	30	32
Spending longer talking on the telephone to others	28	19	26	22	22	29	34	27	36	30	40	7	23	21	38	35	15	31	40	29	22
Spending more time on apps	34	19	15	41	20	39	18	14	44	22	32	6	20	48	29	36	38	45	26	19	20
Spending more time on computer / video games	34	25	24	45	30	31	34	24	42	15	37	24	24	40	34	35	26	38	38	25	26
Spending more time cooking	41	39	35	38	39	46	41	29	38	44	45	19	48	51	40	40	41	50	44	34	41
Spending more time on esports	11	3	3	14	4	10	5	5	23	4	6	4	2	11	12	8	8	10	14	4	4
Spending more time on hobbies / pastimes	33	27	28	34	33	35	28	25	38	34	37	32	27	46	37	37	23	35	19	27	24
Spending more time socializing as a family / household	44	25	28	34	30	56	31	34	46	29	39	27	32	68	27	46	35	46	43	22	28
Spending more time using online learning platforms for yourself	27	14	12	33	13	28	8	7	47	22	21	7	16	47	19	26	31	45	21	12	13
Spending more time using online learning platforms for your child(ren)	15	8	5	13	8	21	5	3	14	10	9	3	9	19	12	15	13	16	13	7	7
Watching more news coverage	57	43	42	54	45	66	41	52	55	48	60	49	57	66	57	50	61	62	53	48	39
Watching more shows / films on streaming services (e.g. Netflix)	53	48	32	64	44	56	39	34	62	52	52	20	50	67	47	41	49	54	54	46	44
Watching more TV on broadcast channels	42	38	38	44	40	35	52	33	56	33	47	50	36	54	39	47	40	46	33	38	39
Watching more videos (e.g. on YouTube)	51	35	19	63	37	55	30	26	65	37	41	33	40	72	44	44	55	55	44	28	33
None of these	3	11	12	2	7	2	7	11	1	3	2	7	6	0	6	4	2	1	2	5	8

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

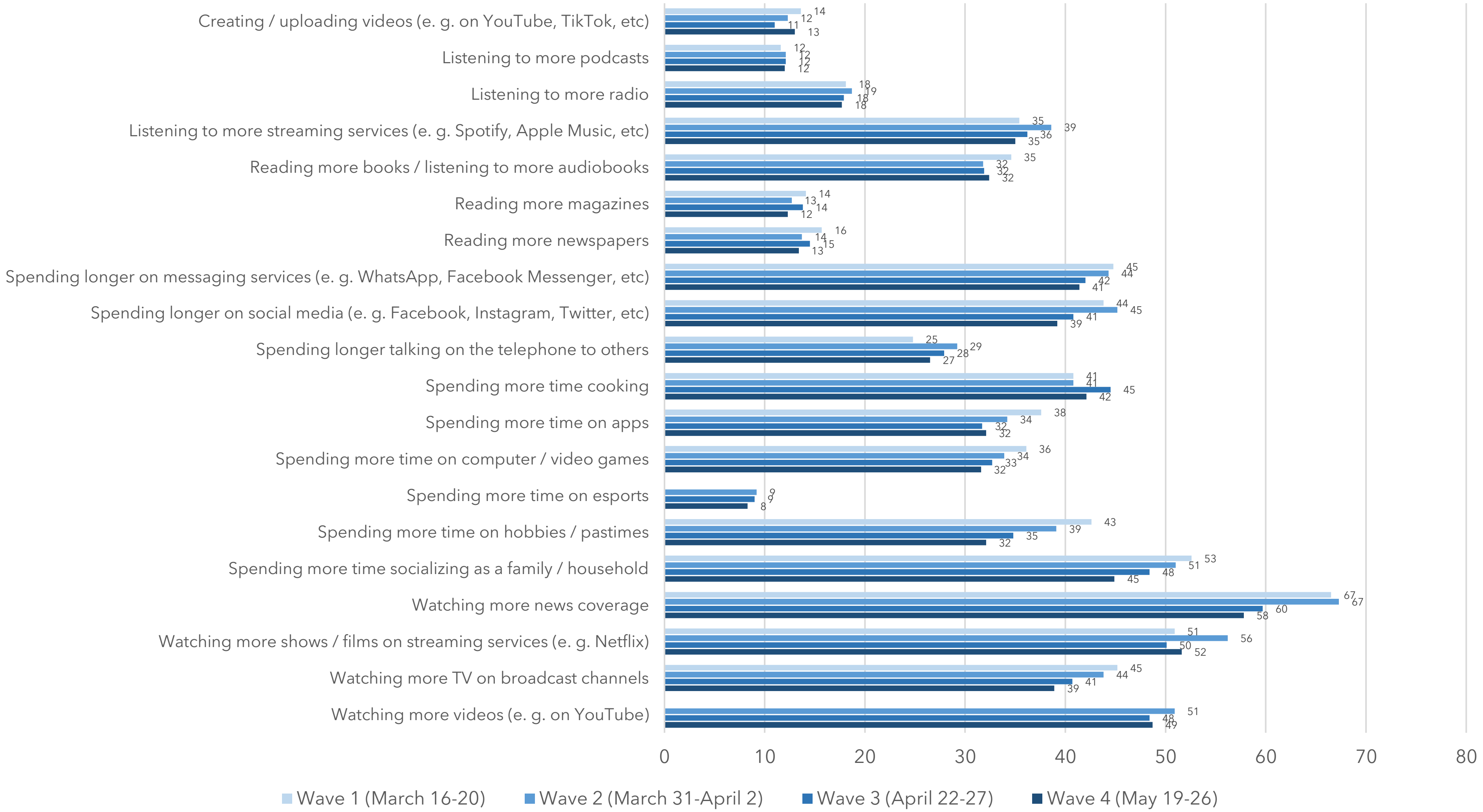
% who say they've been doing the following at home because of the coronavirus / COVID-19 outbreak (average across all markets)

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Creating / uploading videos (e.g. on YouTube, TikTok, etc)	25	18	9	3	15	16	17	17
Listening to more podcasts	16	17	10	10	12	16	17	13
Listening to more radio	18	18	22	20	19	20	21	20
Listening to more streaming services (e.g. Spotify, Apple Music, etc)	50	40	29	17	37	37	40	35
Reading more books / listening to more audiobooks	37	36	29	30	36	32	36	29
Reading more magazines	17	17	14	13	15	16	19	16
Reading more newspapers	24	19	15	16	16	21	20	19
Spending longer on messaging services (e.g. WhatsApp, Facebook Messenger, etc)	48	47	39	30	43	44	48	39
Spending longer on social media (e.g. Facebook, Instagram, Twitter, etc)	54	44	35	27	46	40	46	37
Spending longer talking on the telephone to others	30	29	27	29	30	28	32	28
Spending more time on apps	44	38	25	18	34	34	37	30
Spending more time on computer / video games	42	36	28	20	29	37	33	31
Spending more time cooking	37	41	44	40	49	35	45	38
Spending more time on esports	17	13	5	2	8	14	14	12
Spending more time on hobbies / pastimes	38	34	29	34	35	32	35	31
Spending more time socializing as a family / household	43	45	47	32	46	43	49	35
Spending more time using online learning platforms for yourself	44	30	17	14	28	28	27	26
Spending more time using online learning platforms for your child(ren)	2	18	20	4	16	14	20	7
Watching more news coverage	51	57	61	59	58	56	62	52
Watching more shows / films on streaming services (e.g. Netflix)	63	56	47	32	55	52	57	43
Watching more TV on broadcast channels	42	41	42	47	39	45	45	39
Watching more videos (e.g. on YouTube)	65	55	43	27	50	53	50	47
None of these	2	2	5	8	3	3	2	4

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 four 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	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Creating / uploading videos (e.g. on YouTube, TikTok, etc)	7	2	2	11	3	5	3	2	14	3	4	2	4	11	4	3	4	9	5	2	5
Listening to more podcasts	6	9	4	10	6	3	4	5	11	8	2	2	6	7	5	6	6	12	6	6	8
Listening to more radio	7	9	6	10	8	3	8	11	10	16	7	4	6	11	16	10	11	18	12	12	9
Listening to more streaming services (e.g. Spotify, Apple Music, etc)	17	11	4	21	8	18	9	5	25	12	7	3	7	22	7	6	11	16	11	9	12
Reading more books / listening to more audiobooks	16	13	10	21	11	16	12	13	19	18	15	6	14	16	19	16	12	23	21	17	13
Reading more magazines	6	3	3	4	4	3	5	3	14	4	4	2	2	4	7	2	4	5	4	3	4
Reading more newspapers	7	5	3	6	4	3	5	5	21	5	6	5	2	10	7	3	15	8	8	4	4
Spending longer on messaging services (e.g. WhatsApp, Facebook Messenger, etc)	18	8	8	25	6	20	8	8	28	11	17	2	11	29	14	17	17	24	17	10	5
Spending longer on social media (e.g. Facebook, Instagram, Twitter, etc)	16	6	6	23	6	16	9	5	24	7	12	5	11	30	16	17	14	22	13	6	9
Spending longer talking on the telephone to others	9	5	7	7	6	10	10	6	12	11	11	2	6	7	14	7	4	10	11	8	6
Spending more time on apps	11	3	3	11	3	13	4	2	16	3	6	2	4	16	9	10	10	13	6	4	5
Spending more time cooking	21	23	16	17	20	24	22	14	17	28	22	6	29	33	18	21	17	28	16	17	23
Spending more time on computer / video games	11	11	4	17	8	8	8	7	17	4	9	7	8	17	11	9	9	14	11	7	8
Spending more time on esports	4	1	1	6	1	3	3	2	9	1	2	1	0	4	5	3	3	5	3	1	1
Spending more time on hobbies / pastimes	17	17	15	14	16	19	13	13	19	22	19	18	15	19	19	25	9	19	4	14	12
Spending more time socializing as a family / household	26	15	18	15	16	34	21	20	23	17	23	9	21	48	15	26	18	28	24	11	15
Spending more time using online learning platforms for yourself	13	6	4	16	5	13	3	3	22	9	6	2	7	25	6	10	12	24	8	4	4
Spending more time using online learning platforms for your child(ren)	7	2	1	7	2	10	1	1	7	4	3	1	2	10	4	8	5	9	4	3	3
Watching more news coverage	23	13	11	21	12	30	10	18	24	13	12	16	14	37	21	14	26	33	14	11	13
Watching more shows / films on streaming services (e.g. Netflix)	23	23	12	33	17	20	17	16	31	20	21	11	20	35	20	20	22	27	25	20	19
Watching more TV on broadcast channels	12	9	7	17	10	7	13	8	19	9	8	23	8	19	10	14	12	18	8	11	14
Watching more videos (e.g. on YouTube)	23	14	4	32	13	24	10	9	35	15	11	11	17	42	15	18	24	25	16	11	15
None of these	9	17	19	9	20	5	17	14	4	9	17	23	12	4	11	11	13	6	16	19	18

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

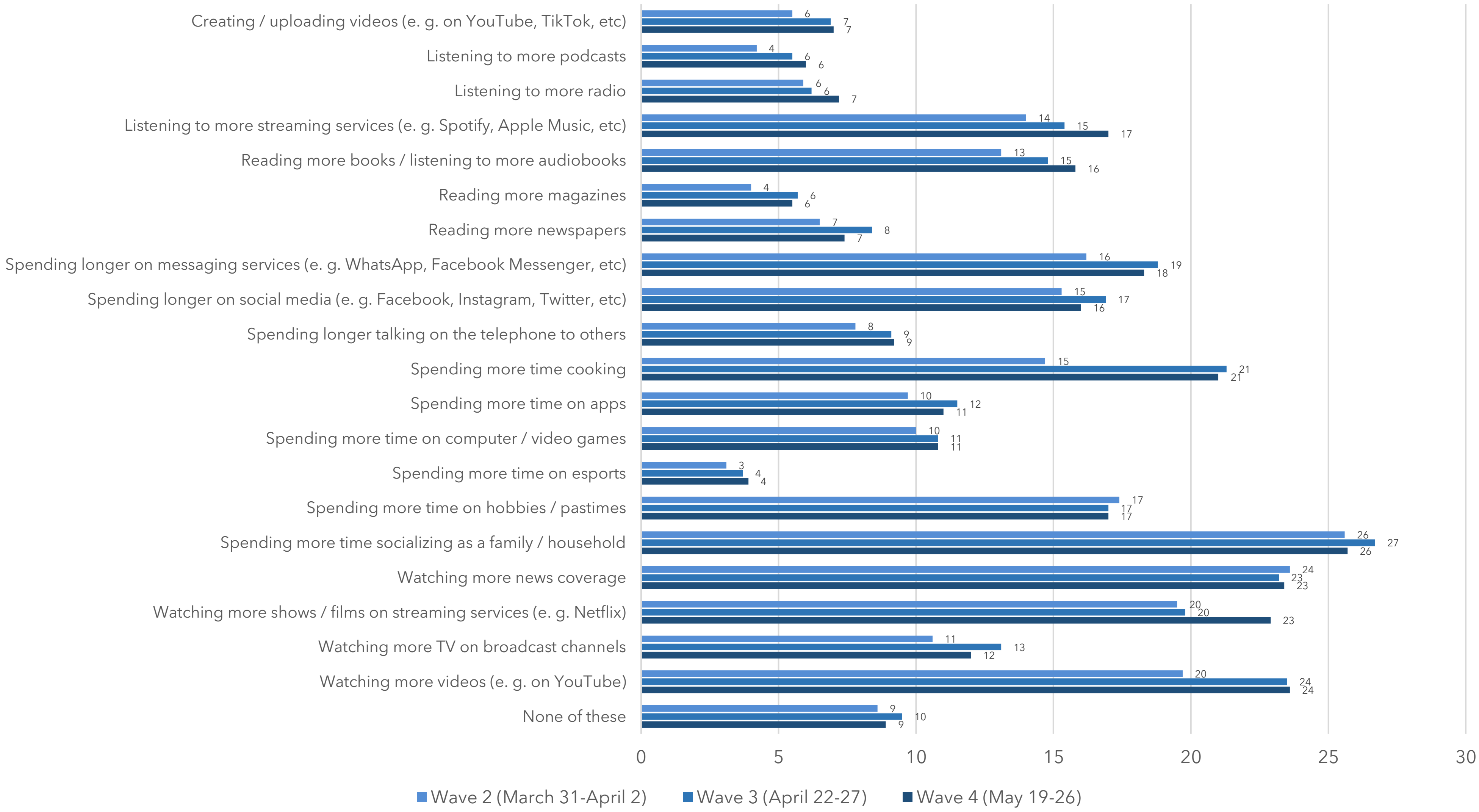
% who say they expect to carry on doing the following, once the coronavirus / COVID-19 outbreak is over*

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Creating / uploading videos (e.g. on YouTube, TikTok, etc)	11	8	4	1	7	7	7	8
Listening to more podcasts	8	7	4	5	6	6	7	6
Listening to more radio	6	6	9	10	7	7	7	8
Listening to more streaming services (e.g. Spotify, Apple Music, etc)	26	18	12	6	17	17	19	17
Reading more books / listening to more audiobooks	16	17	13	17	19	13	17	14
Reading more magazines	6	6	5	5	5	6	6	6
Reading more newspapers	10	7	7	7	7	8	7	8
Spending longer on messaging services (e.g. WhatsApp, Facebook Messenger, etc)	21	20	16	8	19	18	19	19
Spending longer on social media (e.g. Facebook, Instagram, Twitter, etc)	20	17	14	7	18	14	18	15
Spending longer talking on the telephone to others	10	10	9	7	10	8	11	10
Spending more time on apps	12	13	8	4	10	12	13	12
Spending more time cooking	17	21	23	21	26	17	23	19
Spending more time on computer / video games	14	13	7	3	8	13	12	11
Spending more time on esports	6	5	2	2	3	5	5	4
Spending more time on hobbies / pastimes	21	17	16	18	19	15	18	16
Spending more time socializing as a family / household	23	26	29	18	27	24	30	20
Spending more time using online learning platforms for yourself	20	15	7	5	14	12	13	12
Spending more time using online learning platforms for your child(ren)	1	9	7	2	8	6	9	3
Watching more news coverage	17	24	27	21	23	24	25	22
Watching more shows / films on streaming services (e.g. Netflix)	27	24	20	14	23	23	23	20
Watching more TV on broadcast channels	13	12	12	15	11	13	13	14
Watching more videos (e.g. on YouTube)	31	26	17	7	23	24	21	22
None of these	6	7	12	19	8	10	9	9

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 17 markets included in all three 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	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	PL	RO	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Games console	17	16	7	25	14	12	22	16	25	12	14	16	10	14	16	11	8	20	17	16	17
Laptop	46	40	46	44	43	45	39	32	58	46	49	12	47	59	61	59	53	67	51	40	43
PC / desktop	33	24	23	43	28	33	31	26	36	20	28	48	22	40	27	41	22	31	33	15	24
Smart speaker	12	6	3	7	8	12	6	6	22	6	7	6	4	10	4	5	7	8	10	10	9
Smart TV / media streaming device	30	24	10	50	19	29	12	22	35	21	27	8	24	36	20	28	25	28	34	24	29
Smartphone / mobile phone	71	44	46	81	41	82	51	41	80	58	67	42	51	87	63	69	70	76	62	43	45
Smartwatch	8	5	3	6	4	7	2	4	16	6	5	4	3	5	8	9	8	8	8	4	6
Tablet	23	19	14	14	23	28	20	15	21	19	21	16	19	24	18	19	22	21	28	27	22
Other	1	0	1	2	1	1	2	2	2	1	1	2	1	2	1	3	1	2	2	1	1
None of these	5	16	19	1	16	2	14	22	0	7	2	17	9	1	6	6	4	2	2	14	14

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*

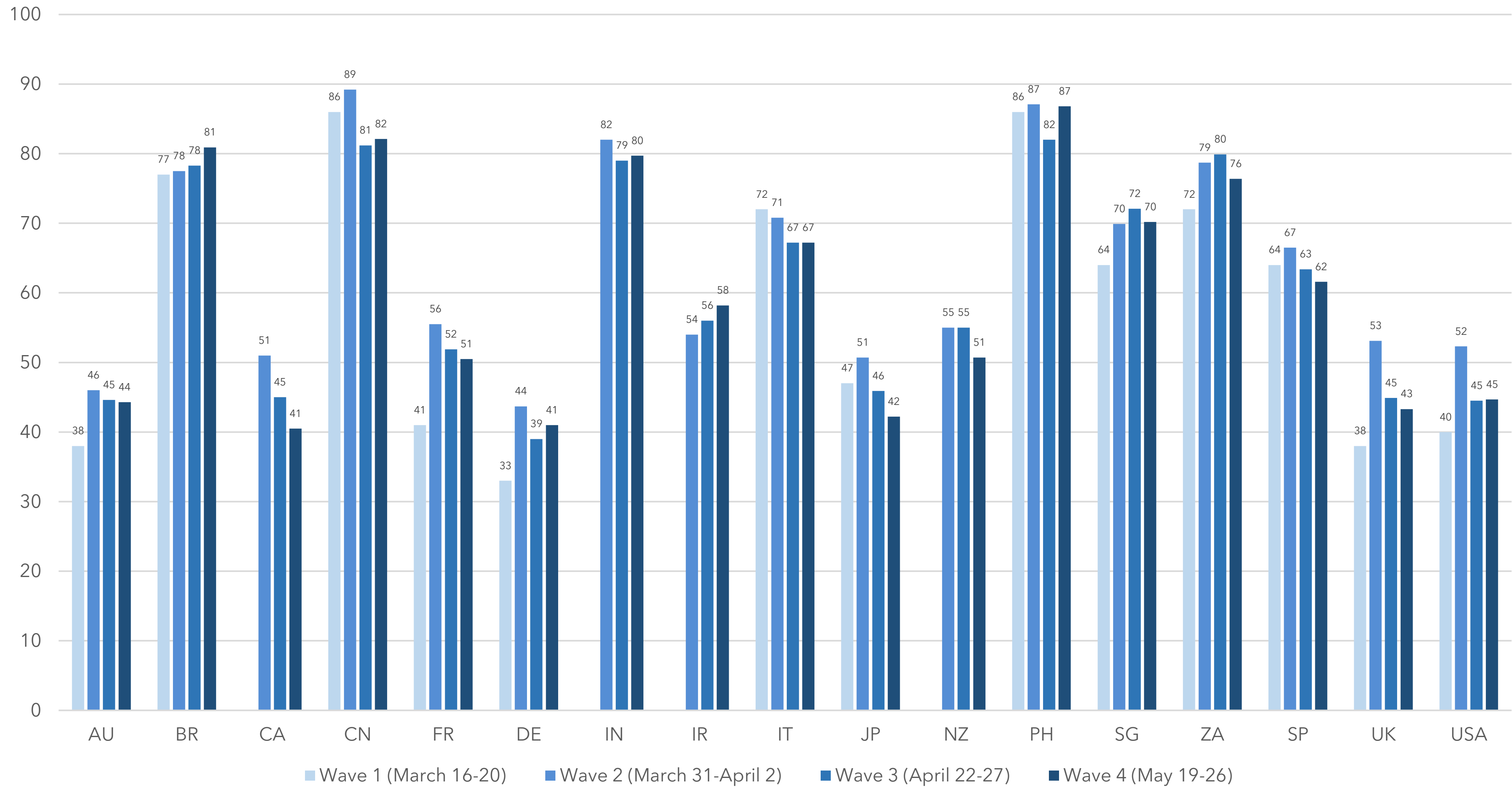
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Games console	18	22	10	3	13	20	21	15
Laptop	57	47	40	39	47	46	51	42
PC / desktop	29	32	36	41	28	37	35	33
Smart speaker	13	14	9	6	13	11	17	9
Smart TV / media streaming device	24	33	30	22	29	31	37	24
Smartphone / mobile phone	79	72	68	49	73	69	69	67
Smartwatch	6	11	5	4	7	9	12	7
Tablet	19	26	22	22	26	21	30	19
Other	3	1	1	1	1	2	1	2
None of these	2	4	9	13	6	5	5	6

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

Jason Mander

Chief Research Officer

jason@globalwebindex.com

Chase Buckle

Trends Manager

chase@globalwebindex.com

Virna Sekuj

Strategic Insight Manager

virna.sekuj@globalwebindex.com

www.globalwebindex.com

E trends@globalwebindex.com