

GWI

Coronavirus Research | April 2020

Multi-market research wave 3

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Introduction

The coronavirus pandemic is still gripping communities worldwide, but lockdowns and restrictions in many countries are beginning to ease a little.

The first and second releases of our multi-market study showed the scale of the impact that the pandemic was exerting on the consumer landscape, as well as how behaviors and sentiments were trending. This third wave, fielded in 17 countries between April 22 - 27, shows us how the picture is evolving as some countries hope to enter the recovery phase. Analyzing the impact across Australia, Brazil, Canada, China, France, Germany, India, Ireland, Italy, Japan, New Zealand, the Philippines, South Africa, Singapore, Spain, the UK and the U.S., this study provides an updated view on many of the themes covered previously and explores expectations for after the outbreak.

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 / release, 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 1,073 (Australia), 1,025 (Brazil), 790 (Canada), 1,054 (China), 1,102 (France), 1,073 (Germany), 1,010 (India), 505 (Ireland), 1,076 (Italy), 781 (Japan), 543 (New Zealand), 762 (Philippines), 768 (Singapore), 411 (South Africa), 1,073 (Spain), 1,144 (UK) and 1,085 (U.S.A.) internet users aged 16-64.

We looked to collect 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 fell a little short of this desired target in South Africa, but decided to close fieldwork anyway in order to ensure a quick speed of release.

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 third 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.); and Wave 2 which was fielded in 17 countries (the same 13, plus Canada, India, Ireland, and New Zealand) between March 31 – April 2. About half of the questions included in Wave 3 were also included in Waves 1 and/or 2; therefore, where possible we have shown trended data for the 13 countries that featured in the three waves.

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 17 markets	IT	Italy
AU	Australia	JP	Japan
BR	Brazil	NZ	New Zealand
CA	Canada	PH	Philippines
CN	China	SG	Singapore
FR	France	ZA	South Africa
DE	Germany	SP	Spain
IN	India	UK	United Kingdom
IR	Ireland	USA	U.S.

Key Insights

Many consumers are planning (very) slow returns to public places

- As “lockdown” or “shelter-at-home” restrictions begin to ease, many consumers are not planning a quick return to various public places. Almost half say they will not return to shops “for some time” or “for a long time”; this rises to nearly 60% for large outdoor venues (e.g. sports stadiums, music festivals) and climbs still higher to two-thirds for large indoor venues (e.g. cinemas, concert halls, sports arenas).
- Globally, only 6% say they will return immediately to large outdoor venues, and only 4% anticipate an immediate return to indoor ones. The figures for shops are slightly higher, but even then, it’s only 9% who expect an immediate return to normality.
- Expectations around returning to shops are fairly consistent by age, income and gender. Elsewhere, demographic variations can be stronger; boomers and the higher income group are the most likely to say they will delay returning to large outdoor or indoor venues.
- As we see in other results in this study, concerns about safety are a key driver here – across a range of questions, future behaviors center around minimizing personal risk; in some cases people plan to achieve that by spending less time in public places, while in others it is through more usage of things like home delivery, digital communication, and staying in the local area rather than venturing further afield.

Growing numbers expect a hit on their personal finances

- It’s still less than 50% in most countries who expect the coronavirus outbreak to have a big or dramatic impact on their personal finances. Nevertheless, the figures are creeping up in most markets, with particularly notable jumps in Brazil and South Africa (two of the markets which are least optimistic about overcoming their national situations).
- By country, figures for expecting a big or dramatic impact on personal finances can vary from as low as 25% in Germany to as high as 86% in the Philippines. The U.S. and UK have both seen little change in their figures across waves 1, 2, and 3; this suggests that, despite the deterioration of circumstances in both places, consumers remain convinced that they will be able to weather the storm.

The anticipated length of the outbreak continues to increase – and rapidly

- Between waves 2 and 3, the number of people expecting the outbreak to last six months or more in their country has increased in almost all markets (Australia, Singapore, and the UK being the only exceptions).
- Some of the rises have been particularly dramatic, as in Germany (49% to 71%), Italy (28% to 57%), and Spain (23% to 52%). With all of these countries having been hit early, it suggests that consumers are now coming to realize that it will take longer than they first expected to recover.
- We see this pattern even in China; although it remains the most optimistic country, the substantial increase in the numbers expecting it to last 6 months+ (from 12% to 26% over a period of just two weeks) is testament to how quickly sentiment can worsen if improvements aren’t seen quickly.
- When asked about expected length of the *global* outbreak, it’s now over 3 in 4 in most countries who expect it to last over 6 months. That represents an increase since wave 2 in almost every country.
- People are typically much more pessimistic about the global situation than their own national one. And there’s a clear correlation with a country’s perceived success in tackling its own outbreak; by some distance, it’s China and then New Zealand which see the biggest gaps here – with their figures for a global 6 month+ timeframe being at least 40 points higher.

Concern about the global pandemic continues to outpace national worries

- In almost all countries, levels of concern about the global situation are higher than those seen for the national picture.
- China continues to record one of the biggest gaps (35 points), but it is now followed very closely by New Zealand (28 points). The latter's recent announcement that it has effectively eliminated the spread of transmission is likely to be a big driver here. Australia and Germany also record larger than average gaps (Germany's concern about their national situation having dropped 9-points since wave 2, a reflection of the country's perceived success in tackling the crisis).
- When asked if they are optimistic about their country overcoming the outbreak, results are strikingly different. China once again remains exceptional, with almost everyone feeling positive (93% in waves 1 and 2, vs 92% in wave 3). It's also one of the only places where we've seen no movement in the figures over the last month. In contrast, we've seen sustained and, in some cases, substantial increases in optimism in Australia, Germany, and South Africa. Conversely, we've seen consistent drops in optimism in France, Italy, Singapore and - most notably - Spain.

9 in 10 in most countries expect a big or dramatic impact on the national economy

- If consumers remain largely optimistic about their own personal finances, this mindset is completely reversed when it comes to the outlook for the national economy. China, Germany, and the U.S. are the only places among the 17 countries surveyed where fewer than 90% expect a big or dramatic impact nationally.
- New Zealand records the biggest disparity in terms of the expected personal vs national impact: in that market, 34% expect a hit personally but 93% are bracing themselves for a national impact - giving a gap of 59 points. Nevertheless, the figure passes 50 points in Australia, Canada, France, Germany, Ireland, Italy, the UK and the U.S.

Promotions could be key as 8 in 10 plan to delay big purchases and 4 in 10 look to cut back on day-to-day spending

- When we ask consumers how they plan to respond to the outbreak financially, about 8 in 10 plan to delay big purchases, while just over 4 in 10 say they will cut back on the day-to-day things they buy. Around a third will be using their savings or reducing their regular financial commitments (e.g. subscriptions).
- Almost 1 in 3 say they will wait for products to be on promotion or sale, a figure which peaks at around 40% in Brazil, Canada, and Singapore.
- The appeal of promotions and discounts emerges in several places across wave 3 of our research. For example, those who have delayed purchasing a technology device are twice as likely to say they will wait for it to be on promotion/offer as they are to look for cheaper options from the same brand. They are also almost four times more likely to hold out for promotions rather than looking for cheaper options from an alternative brand.
- It's a similar story with luxury items (e.g. designer clothes, shoes, fragrances); those who have delayed such a purchase are more likely to wait for a promotion than take any of the other actions we asked about. This suggests a clear opportunity to galvanize loyalty and encourage spending through the use of offers.

Numbers delaying purchases continue to rise

- In most categories, the numbers who say they have delayed a purchase have risen since wave 2. This is especially evident with clothing (+5 points), home appliances (+5 points), luxury items (+4), and vacations (+9).

- The delay to clothing purchases is led by Gen Z, where over 4 in 10 have halted a purchase. This group is also the most likely to have delayed buying a smartphone (33%), a smart device (21%), or a personal electronic device (33%). For many other categories, it's millennials who are most likely to be delayers - including for flights, vacations, luxury items, home furnishings, and home appliances.
- There are strong income-based trends in evidence here. The lower income group is most likely to have delayed purchases of clothing, insurance, and technology devices, whereas the higher income group is notably ahead for delayed automotive, travel, luxury and domestic purchases.
- The delay to purchasing luxury items has grown consistently in China, from 20% in mid-March, to 24% in early April, to 31% in mid-April. Nevertheless, as we saw above, luxury buyers are particularly receptive to promotions as a way to kick-start spending, and China also sees the highest levels of optimism of any country.

Over half have delayed booking a vacation - and safety is key to re-starting a market that could look very different

- Globally, it's now more than 1 in 2 consumers who say they have delayed booking a vacation; the figure peaks at close to 60% in China and Singapore, as well as among the higher income group (62%).
- Across the 3 waves of research, we've seen consistent increases in delayed vacation purchasing in virtually every market. For example, it's grown from 28% in France in mid-March to 48% in mid-April; and in the U.S. the numbers have risen from 30% to 49% over the same period.
- Vacations emerge as the top priority in terms of post-outbreak purchases. Almost a quarter say this will be their top priority, rising to almost a third among the most affluent group. There's an age-pattern at work too; the older the consumer, the more likely they are to prioritize booking a vacation (with boomers scoring 29%, vs. 18% for Gen Z - the latter being most focused on clothing at 25% and smartphones at 20%).
- When asked what would give them confidence to travel again, a personal feeling of safety is by far the top option - scoring 58% globally and peaking at almost 70% in markets like the U.S. and Ireland. Safety is also paramount for boomers, where 65% select it.
- A feeling of safety scores almost twice as much as any other option, with countries re-opening their borders, the removal of stay-at-home restrictions, feeling secure financially and travel advice being issued by the government all polling around 30%. There can be strong national variations, however; government-issued travel advice is important to just 10% in France, vs. 40% in places like Australia and Singapore.
- Only around 20% say they don't plan to make any changes to their vacation behaviors. The most popular option at the moment is to have more staycations / trips in the local area, followed closely by taking more domestic vacations. This reflects a combination of two factors: the feeling that one's own country is outperforming the global average, together with the importance of safety in terms of vacations.

Half of consumers support "normal" advertising

- From a list of 11 possible actions that brands could be taking at the moment, running "normal" advertising which is unrelated to coronavirus scores the lowest approval rating. Nevertheless, it's still 52% globally who approve of this, with the figure passing 60% in Brazil, India, Italy, and Spain. In no country do we see approval dip below 40%.
- Topping the list of brand actions are the provision of practical information / tips to help people deal with the situation (83%) and pledging money / aid / supplies (83%). That's followed by two more financially oriented activities: running promotions (81%) and offering flexible payment terms (80%).

- Most options tracked in multiple waves have either seen no real change to their global figures, or a slight decrease. The obvious exception to this is running promotions, which is up by 6 points – suggesting that many people are preparing to start purchasing again, and are looking for financial support from brands.
- Promotions have an appeal which transcends the age, income and gender breaks although, interestingly, the higher income group is 5 points ahead of the lower income one. Clearly, the appeal of value-for-money in the post-covid landscape will be widespread.

Biggest support for brands which can meet needs and which have good availability

- Although it's challenging for consumers to know precisely which factors will influence their future decisions over which brands to buy from after the outbreak is over, their expressed views are still highly revealing. They show that brands which can best meet their needs (56%) and have the best product availability (39%) should find it easiest to resonate.
- In terms of coronavirus-specific responses, those companies which can demonstrate that they helped people during the outbreak (38%) could find it easier than those which focused efforts on contacting consumers (17%). In fact, the latter scores the lowest figures of any option that was asked. Nevertheless, it does resonate particularly strongly with Gen Z (23%), especially in comparison to boomers (9%).
- Price will play an obvious factor too; 30% select this as a main influencer, rising to 50%+ in Brazil and New Zealand
- Country-by-country variations can be highly revealing here. In Canada, Ireland, and New Zealand, there's particular support for local / independent businesses. In Germany, we see a much higher than average figure for supporting businesses that a consumer has bought from previously. Meanwhile, Chinese consumers are more receptive than their counterparts in other markets to businesses that can demonstrate that they helped people.

Consumers expect to reduce their out-of-home leisure behaviors

- Across the 17 markets surveyed, 2 in 3 consumers say they expect to reduce how frequently they engage with various out-of-home leisure activities.
- Restaurants are top of the list for a reduction; over 40% anticipate they will eat out at restaurants less frequently. It's a figure which remains consistent by age, gender and income, but which does peak among Gen Z at closer to 50%.
- About a third think they will eat at fast-food outlets, visit bars / pubs or visit the cinema less often. Most of these behaviors are once again led by Gen Z; it's no coincidence that this generation also expect the biggest impact on their personal finances, and hence promotions, value for money and reassurance over spending being worthwhile will likely appeal strongly here.
- With over 40% saying they plan to exercise at home more frequently after the outbreak, we have some context for why 1 in 10 say they expect to cancel a gym membership.

Online shopping should see a long-term boost – and free, reliable delivery is highly valued

- Over 40% say they will shop online more frequently after the outbreak, hitting 50% in China. Some countries such as Japan and France are notably less enthusiastic about this, but the global figures remain high and consistent by gender, income, and age (only dropping a little among boomers).
- For those planning to increase their online shopping, home delivery is around twice as popular as in-store collection. Convenience will be a big driver to this, but as we've seen elsewhere, safety is paramount too: significant minorities want to reduce the time they spend inside stores as well as visit stores less frequently.
- Compared to before the outbreak, free delivery (51%) and reliable delivery (51%) are the things people think have become more important to them. The figures for free delivery are remarkably consistent across the major demographic splits, whereas reliable delivery matters more to Gen Z, millennials and the higher income group.

- A wide range of categories can be expected to benefit from this increase in online shopping. Across the 17 markets, around 3 in 10 say they plan to shop online more for groceries, household essentials and personal care products. Nevertheless, clothing could also benefit significantly (29%), as could cosmetics, personal electronics, and smartphones (all scoring over 20%).
- In many of the categories tracked, figures peak in China – suggesting that a country which was already at the vanguard of online shopping will see yet more momentum here.

Convenient solutions popularized or highlighted during the outbreak can expect lasting gains

- Many of the tools and solutions that people have turned to during the “lockdown” period can expect a lasting boost. About a fifth say they will use food delivery services more frequently, around a quarter plan to use video conferencing platforms such as Zoom more regularly, and about a third plan greater usage of mobile payment services and video calling tools such as FaceTime.
- As might be expected, there are strong demographic influencers at work. Gen Z are over three times as likely as boomers to plan higher usage of food delivery services. Similar age patterns are present for mobile payment services, video calling and video conferencing. The higher income group also tends to take a lead over the lower income one, especially for using video conferencing.
- With many companies having to move to full remote working during the outbreak, it’s clear that employees will expect more convenient and flexible options once normality resumes. It’s close to 1 in 4 who say they expect to work from home more frequently, peaking among Gen Z and the higher income group.
- Learning platforms can also be expected to have a more visible presence in the future. Globally, around a third say they are spending more time on them during the outbreak, but this rises to over 50% among Gen Z. And, crucially, over a fifth of this youngest cohort expect to continue this after the crisis is over.

Initial diversification of media consumption appears to be slowing

- In wave 1, we saw a wide range of media and in-home activities benefitting as people looked for ways to fill their time during “lockdown”. In wave 2 in early April, there were small decreases evident for many of them, suggesting that initial enthusiasm was being replaced by a sense of fatigue among at least some consumers. This pattern has continued in wave 3 in mid-April, with almost all of the 20 tracked activities seeing another small decline.
- Of course, in some cases this will be the result of countries beginning to ease “lockdown” restrictions; there simply aren’t as many people still confined to their homes, and so there isn’t as much additional time to spend on media activities. But especially among younger groups, we’re also seeing evidence of people focusing on activities that were already popular among their demographic. If we look at Gen Z as an example, some the strongest figures come for things like social media, messaging services, videos, and streaming services; in each case, over 50% say they are spending more time on them, and around a quarter or more say they expect to continue this increased level of consumption after the outbreak. Effectively, the initial diversification is giving way to a more concentrated focus on key activities.

Levels of Concern (Own Country)

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

	All	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Not at all concerned	5	3	1	2	9	4	5	1	2	2	2	5	0	1	1	1	2	3
A little concerned	22	24	8	14	40	16	33	3	12	16	10	33	2	6	5	11	13	15
Quite concerned	20	30	14	31	25	27	27	6	22	32	19	29	7	24	13	27	26	25
Very concerned	26	24	35	32	19	33	25	28	34	33	28	21	27	36	30	34	31	31
Extremely concerned	28	20	42	20	7	21	11	62	30	17	41	13	64	33	51	27	27	27

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

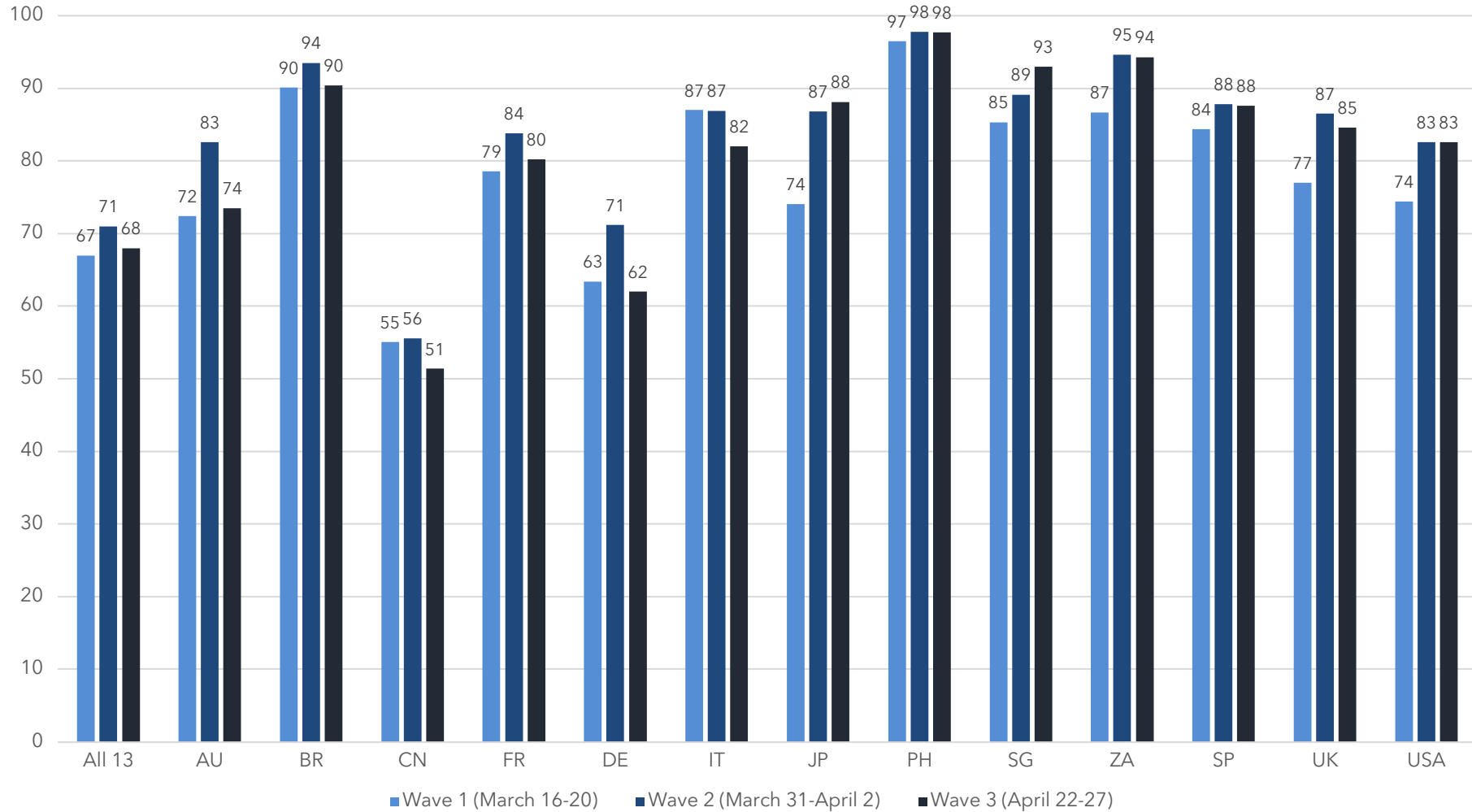
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Not at all concerned	4	5	5	5	4	5	4	6
A little concerned	19	23	24	18	22	22	20	23
Quite concerned	16	21	22	24	21	20	21	20
Very concerned	29	23	26	27	25	26	27	24
Extremely concerned	33	28	23	25	28	27	29	27

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	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Not at all concerned	2	2	1	2	2	3	4	1	2	3	2	2	1	1	1	1	2	3
A little concerned	10	11	7	9	12	14	20	2	8	13	7	7	2	4	3	11	11	14
Quite concerned	19	25	16	27	22	32	30	6	17	30	14	26	8	24	12	30	26	22
Very concerned	34	30	35	33	39	32	30	27	34	37	30	34	30	36	30	36	34	35
Extremely concerned	36	33	42	29	25	19	16	64	39	18	46	30	59	35	54	22	27	26

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

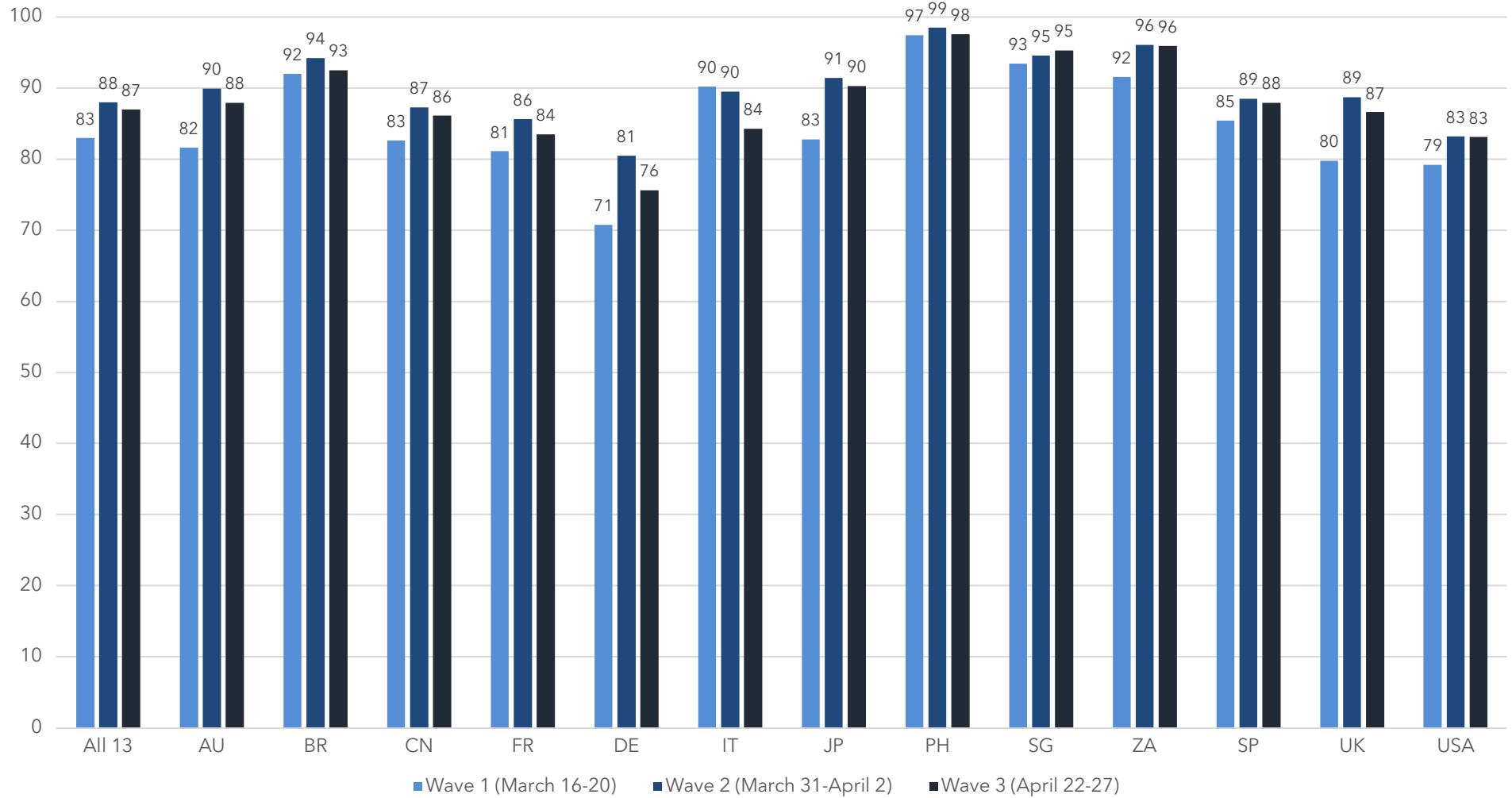
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Not at all concerned	1	2	2	1	1	2	1	2
A little concerned	6	10	11	12	10	9	9	10
Quite concerned	19	18	19	22	19	19	17	21
Very concerned	36	34	34	34	35	34	36	34
Extremely concerned	39	36	33	31	35	36	37	33

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

Levels of Concern (Global): Trended Data

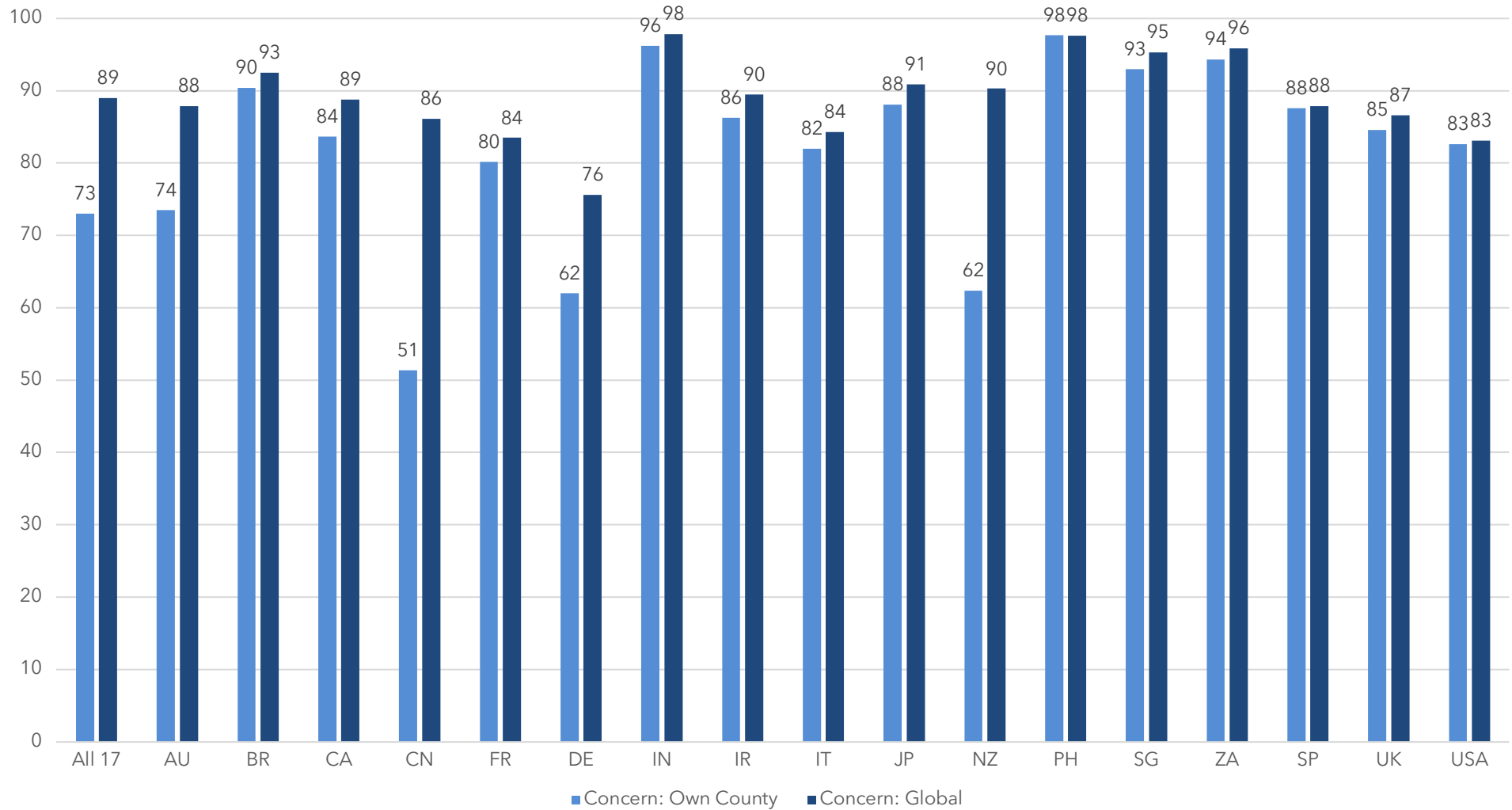
% who say they're extremely, very, or quite concerned about the coronavirus / COVID-19 situation globally



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	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
A few more days	1	0	2	1	1	1	1	3	1	1	0	1	1	1	1	1	1	2
1-2 weeks	3	2	4	2	4	1	2	3	2	3	1	2	4	1	1	1	3	1
3-4 weeks	11	6	9	5	15	5	4	14	3	6	2	12	5	3	2	6	5	9
2-3 months	33	21	27	22	45	21	11	35	15	20	11	26	28	16	10	24	22	22
4-5 months	13	11	18	12	10	16	11	15	12	14	8	10	16	11	16	16	13	14
6 months	16	24	18	16	15	21	14	16	15	17	16	21	20	24	25	13	17	11
Up to a year	13	23	15	21	7	17	32	11	31	26	23	18	21	32	26	18	23	19
Longer than a year	10	13	7	21	4	18	25	5	21	14	40	10	6	13	20	22	17	22

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

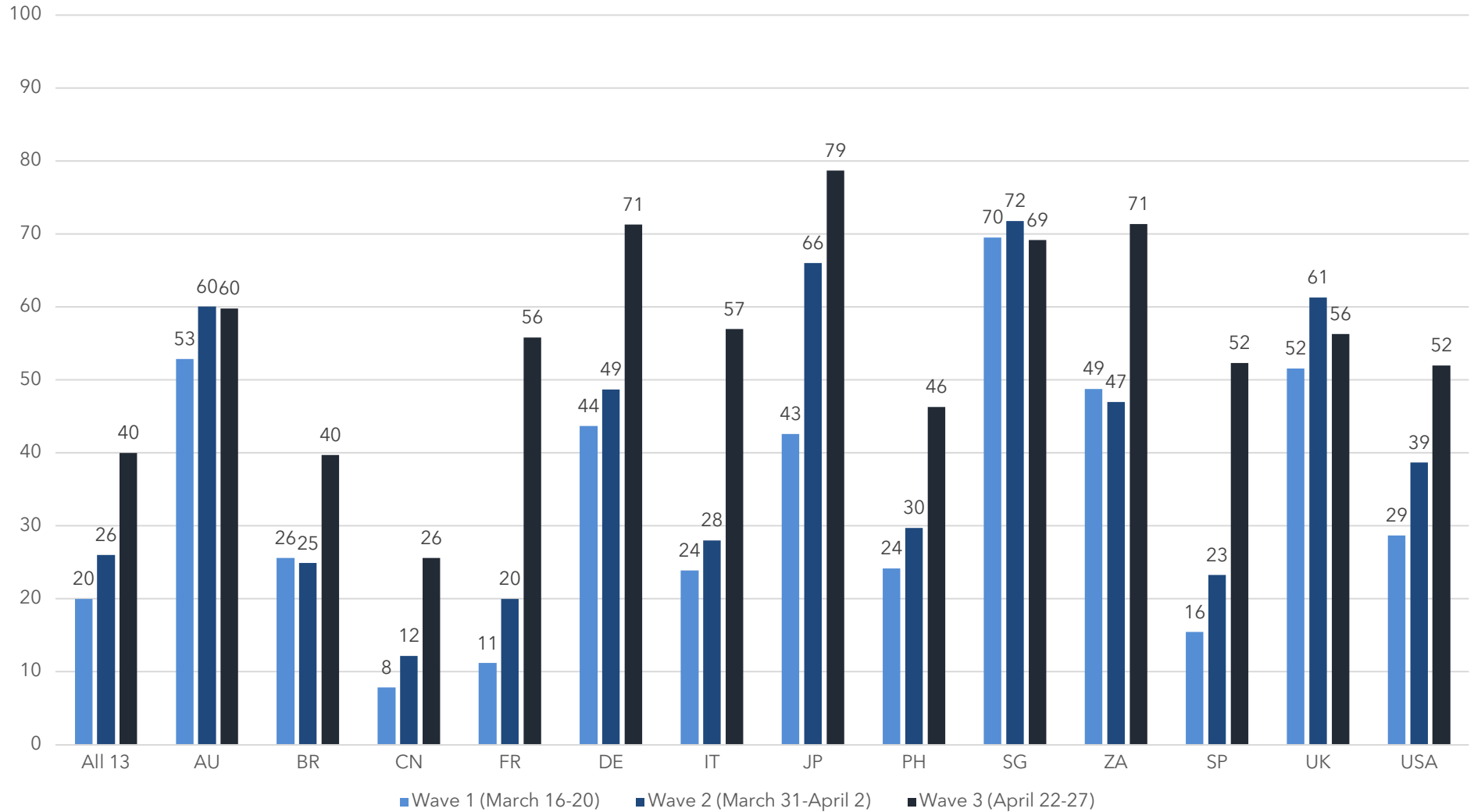
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
A few more days	1	1	1	0	1	1	1	3
1-2 weeks	4	3	2	2	3	3	4	3
3-4 weeks	15	11	10	7	10	12	9	13
2-3 months	36	34	32	25	32	34	33	34
4-5 months	15	12	12	10	12	13	12	13
6 months	14	17	16	16	16	15	17	13
Up to a year	12	12	14	21	15	12	14	12
Longer than a year	4	10	14	19	11	10	11	10

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	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
A few more days	1	0	2	2	0	0	0	2	0	0	1	1	1	1	1	0	1	0
1-2 weeks	1	1	2	1	1	1	1	2	0	1	1	1	1	1	0	1	2	1
3-4 weeks	3	3	6	1	2	3	1	5	2	2	1	1	2	1	1	1	3	4
2-3 months	9	5	13	7	9	8	4	11	4	5	4	3	9	4	3	6	7	11
4-5 months	12	6	15	8	12	11	6	18	8	10	5	4	15	6	7	11	7	10
6 months	21	11	19	9	29	16	8	21	8	12	8	14	16	12	10	14	13	13
Up to a year	27	35	24	29	27	29	27	26	29	34	23	28	34	38	38	25	31	26
Longer than a year	26	38	19	44	20	33	52	16	48	36	59	50	23	38	40	42	38	35

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

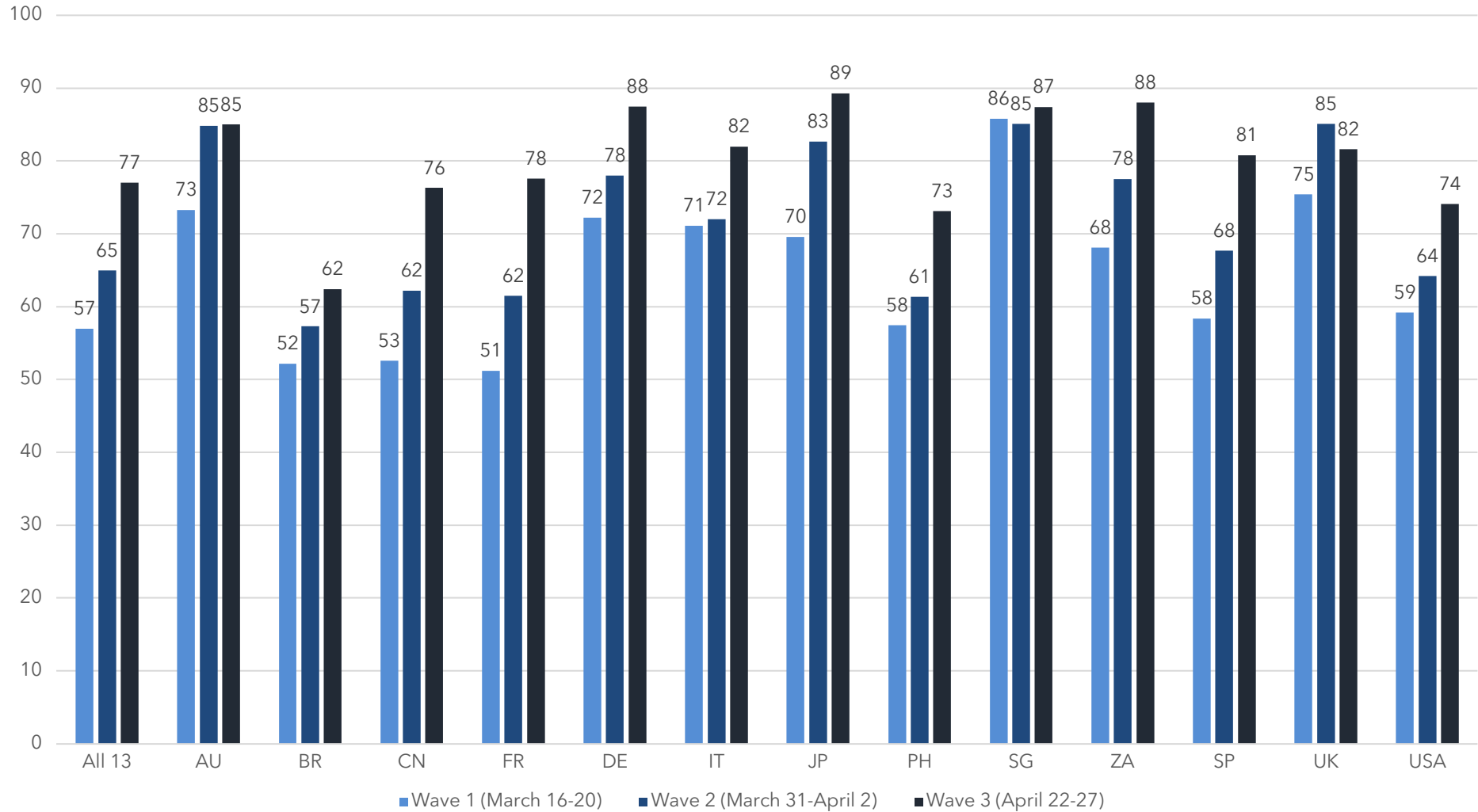
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
A few more days	1	1	0	0	1	1	1	2
1-2 weeks	2	1	1	0	1	1	1	2
3-4 weeks	5	2	2	2	2	4	2	3
2-3 months	9	9	9	8	9	9	9	12
4-5 months	16	12	11	11	12	12	14	11
6 months	19	23	21	13	21	21	21	19
Up to a year	28	27	27	25	26	28	27	24
Longer than a year	20	25	30	40	28	25	26	27

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

Expected Length of Outbreak (Global): Trended Data

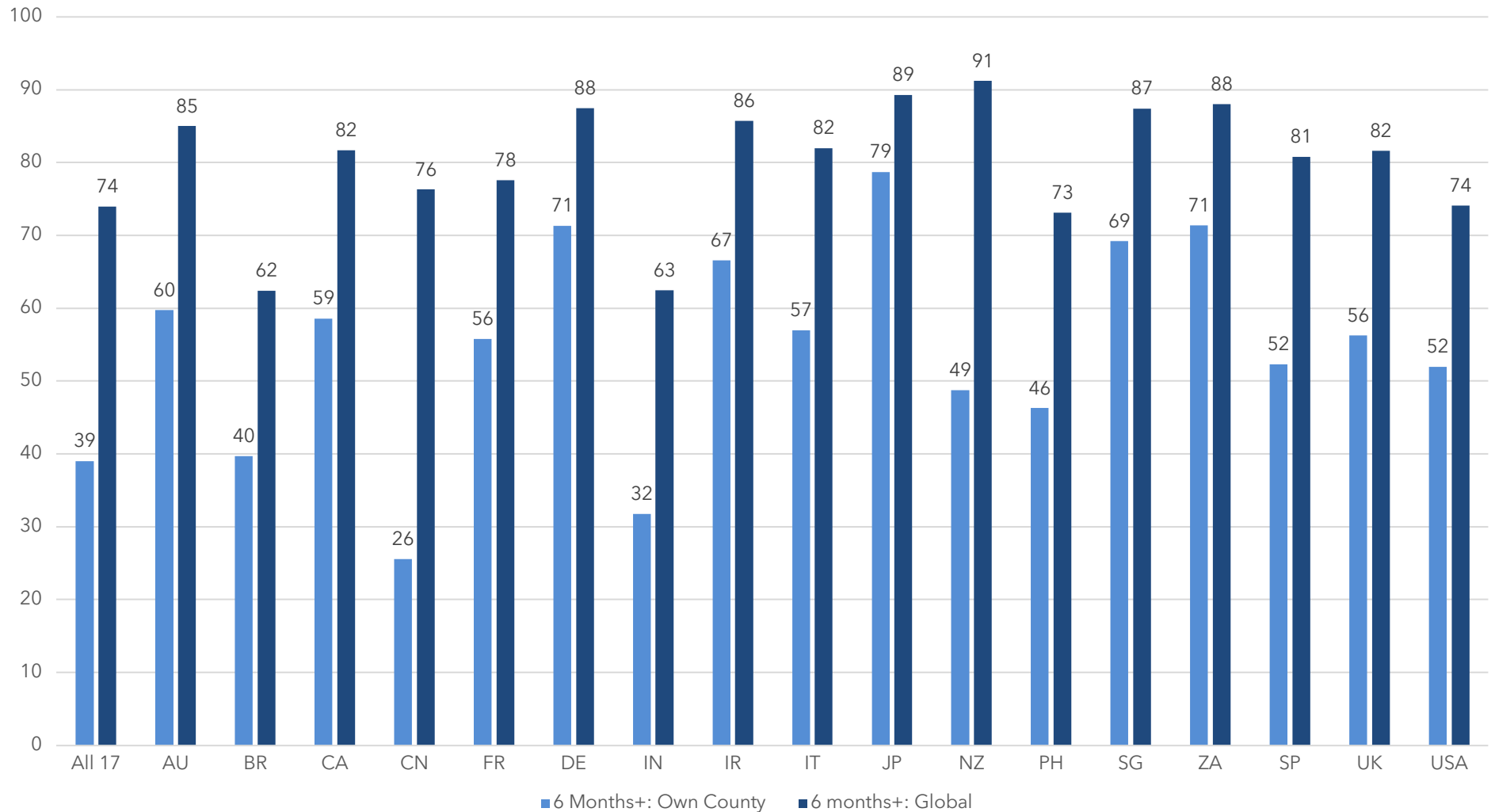
% who say they think the coronavirus / COVID-19 outbreak will last 6 months or more globally



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	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1 - Not optimistic at all	5	3	13	4	1	11	6	2	2	5	39	3	2	4	6	9	5	4
2	7	5	22	8	1	15	7	3	5	11	30	3	7	7	8	17	11	10
3	19	26	34	32	6	42	38	15	30	40	23	14	21	32	29	40	34	33
4	28	42	21	37	28	25	40	31	42	32	5	41	29	41	31	26	35	32
5 - Very optimistic	42	24	11	19	65	8	10	49	20	13	3	39	41	17	26	9	15	22

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

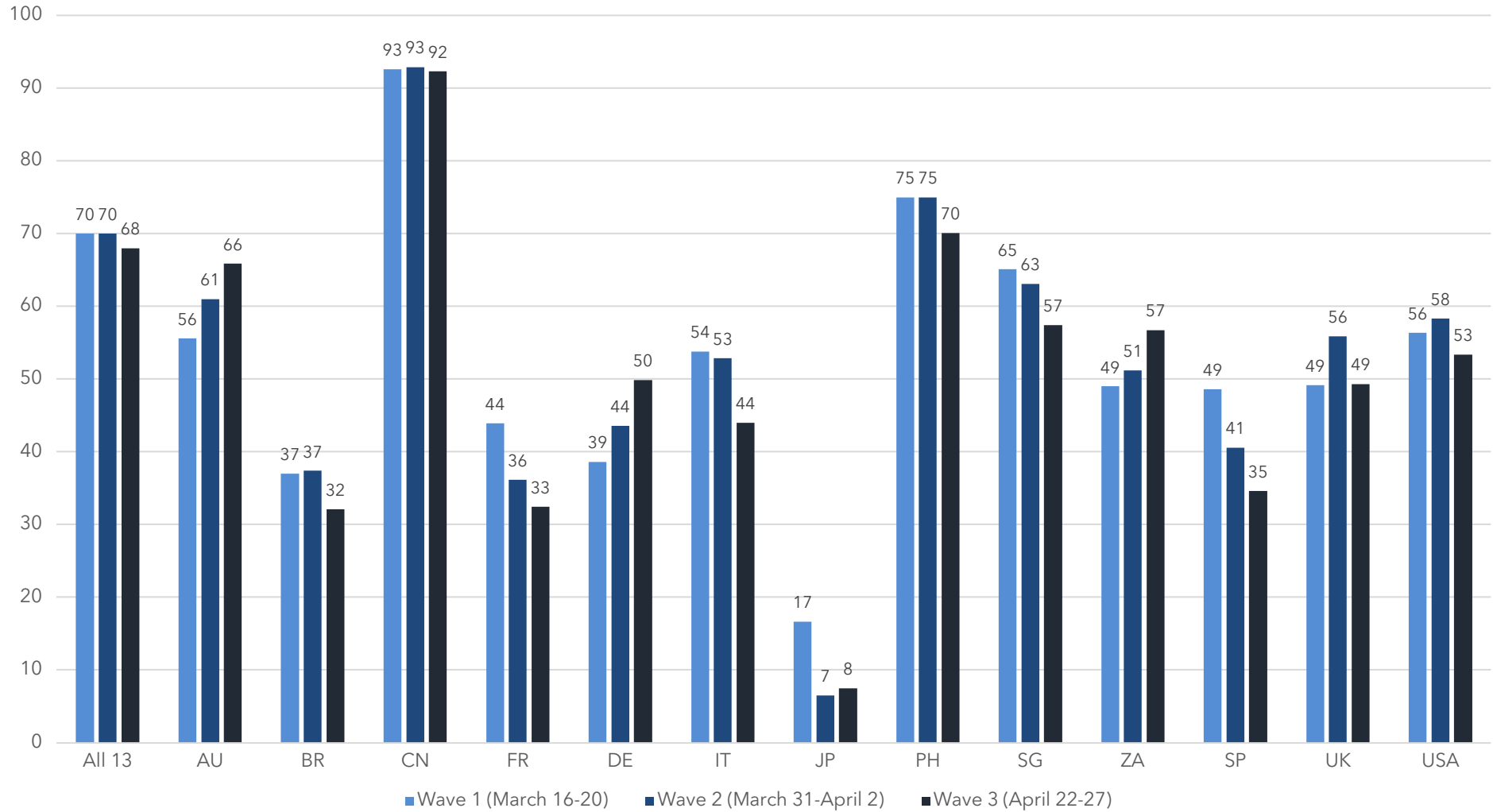
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
1 - Not optimistic at all	3	4	6	9	5	5	5	4
2	6	6	8	10	7	6	7	7
3	16	18	21	24	21	17	18	19
4	28	30	27	28	27	29	28	26
5 - Very optimistic	48	43	39	30	41	43	43	44

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	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1 - Not optimistic at all	7	8	4	6	6	9	11	2	5	5	44	9	1	6	3	8	6	6
2	14	15	21	14	16	23	27	5	14	15	29	21	3	16	8	23	13	11
3	36	41	33	44	45	45	48	21	35	40	23	44	16	41	28	42	38	35
4	26	25	30	27	24	17	12	33	32	29	3	20	31	29	31	19	29	31
5 - Very optimistic	17	11	12	9	10	6	3	40	15	11	2	7	49	8	30	8	13	18

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

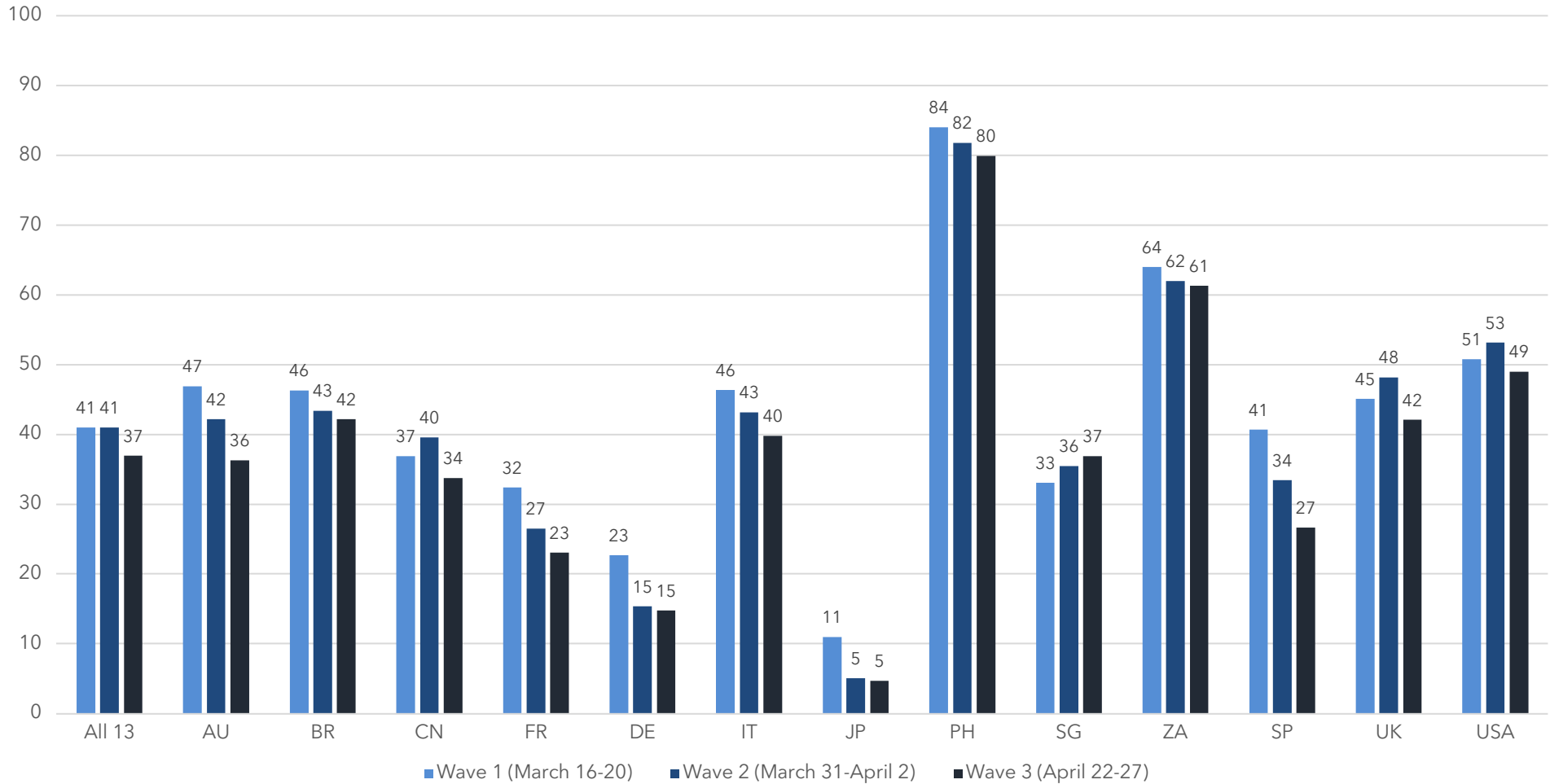
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
1 - Not optimistic at all	3	6	9	12	7	7	6	8
2	12	14	15	20	15	14	14	14
3	35	35	38	34	36	36	35	36
4	31	25	24	22	25	27	26	24
5 - Very optimistic	19	20	14	12	17	17	18	18

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

Levels of Optimism (Global): Trended Data

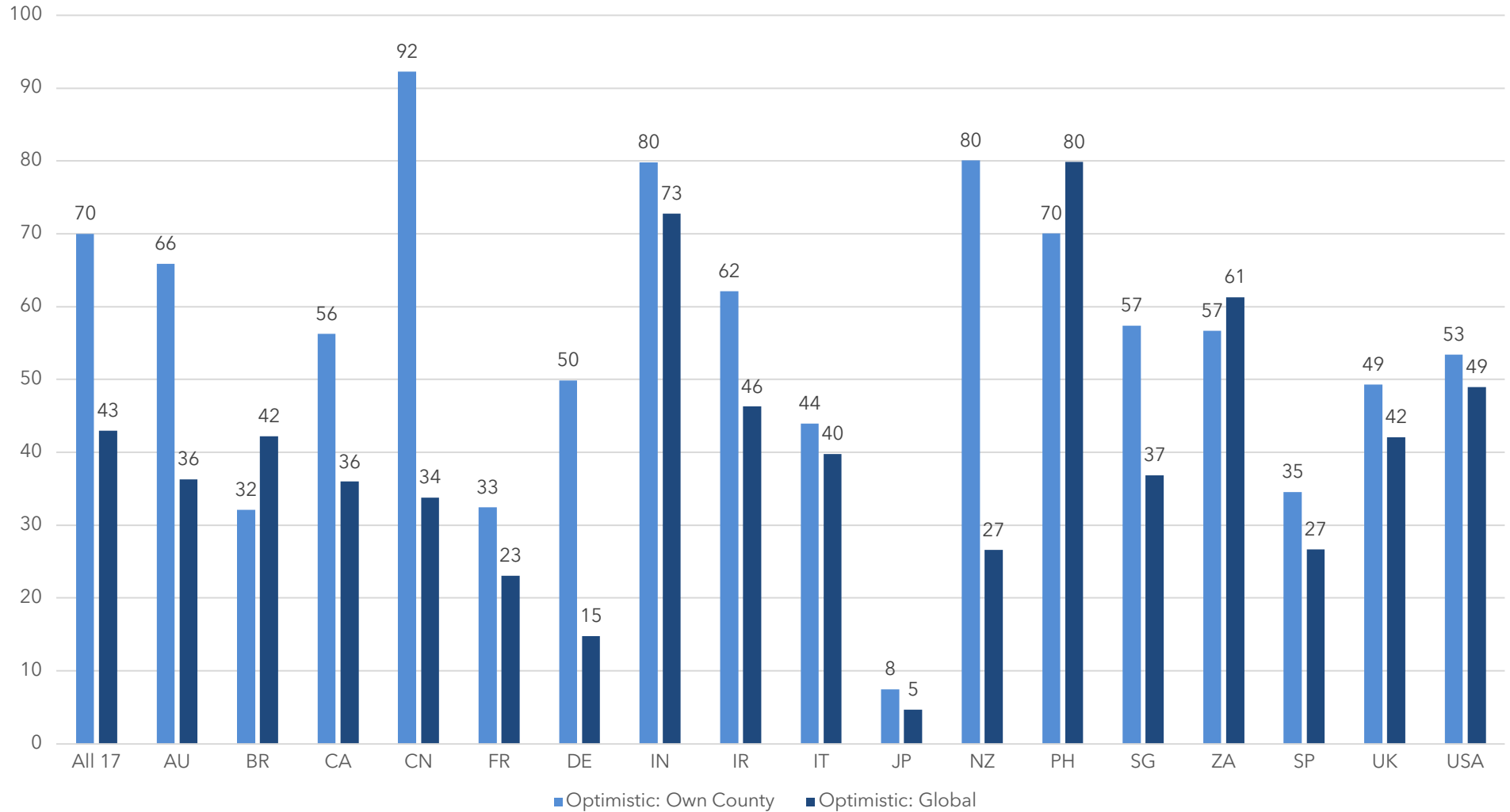
% who say they feel optimistic that the world will overcome the coronavirus / COVID-19 outbreak



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	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
No impact	10	14	5	14	10	17	27	3	9	9	4	15	1	4	4	6	22	22
Small impact	43	42	33	40	58	41	39	29	42	39	34	47	13	35	18	29	39	38
Big impact	32	28	38	29	23	28	16	53	27	34	42	27	62	41	52	40	23	23
Dramatic impact	11	9	18	11	8	7	9	13	12	9	9	7	24	13	21	11	8	8
Not sure	4	6	5	5	1	7	10	3	11	8	12	5	0	7	5	14	8	10

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

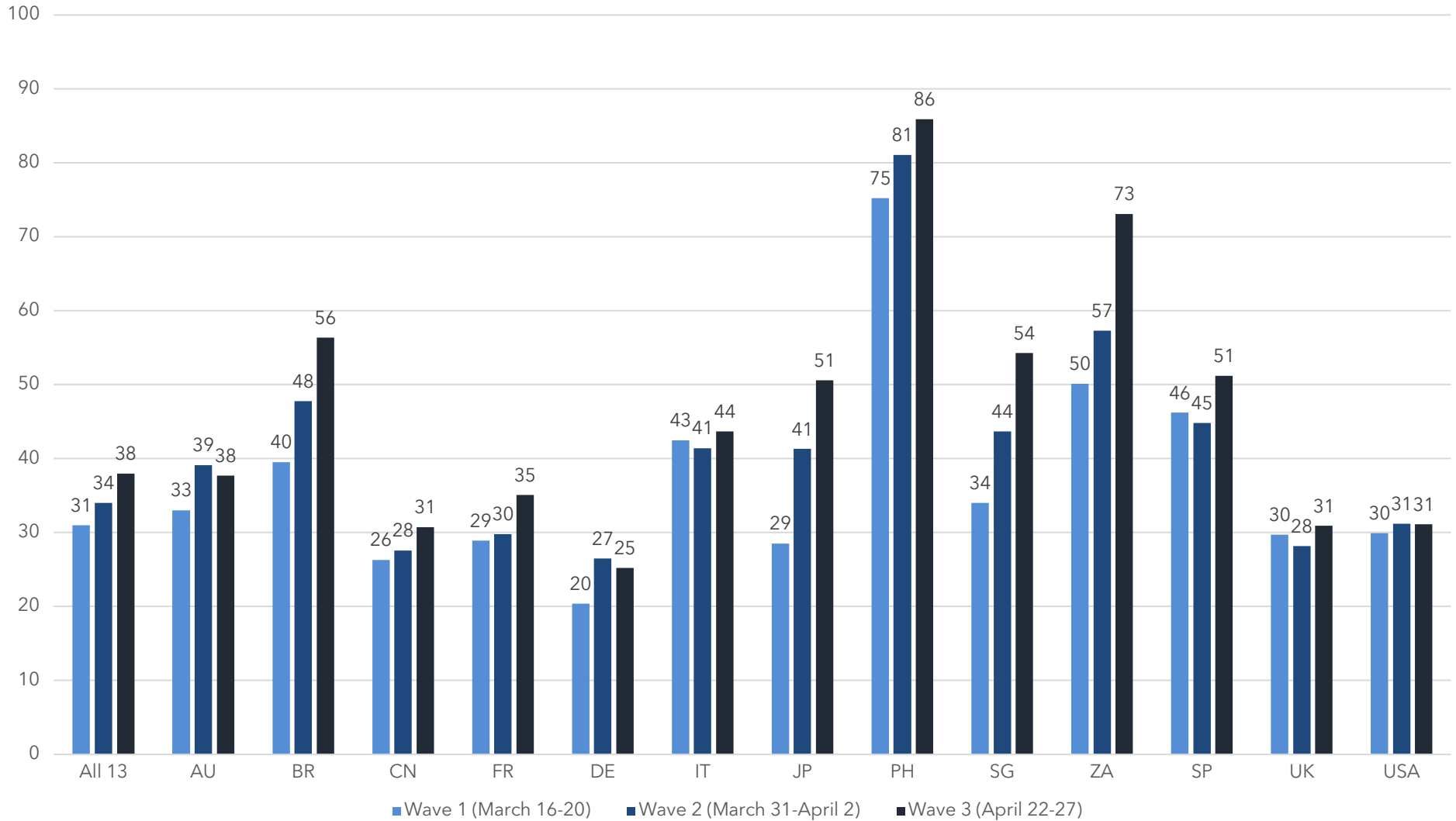
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
No impact	5	10	12	18	11	10	11	9
Small impact	43	43	43	42	43	43	47	36
Big impact	36	33	30	24	31	33	31	37
Dramatic impact	14	10	9	8	10	11	8	13
Not sure	2	4	5	8	5	4	3	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	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
No impact	1	1	0	1	2	1	2	1	0	1	0	0	0	1	0	0	1	1
Small impact	13	4	5	5	24	6	11	6	3	4	3	4	3	4	3	1	9	8
Big impact	53	55	46	50	51	61	52	65	44	55	53	62	56	59	41	51	49	43
Dramatic impact	30	38	45	43	20	30	28	26	50	39	39	31	41	36	54	45	36	44
Not sure	3	2	4	2	2	3	7	2	3	1	5	3	0	1	2	2	5	4

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

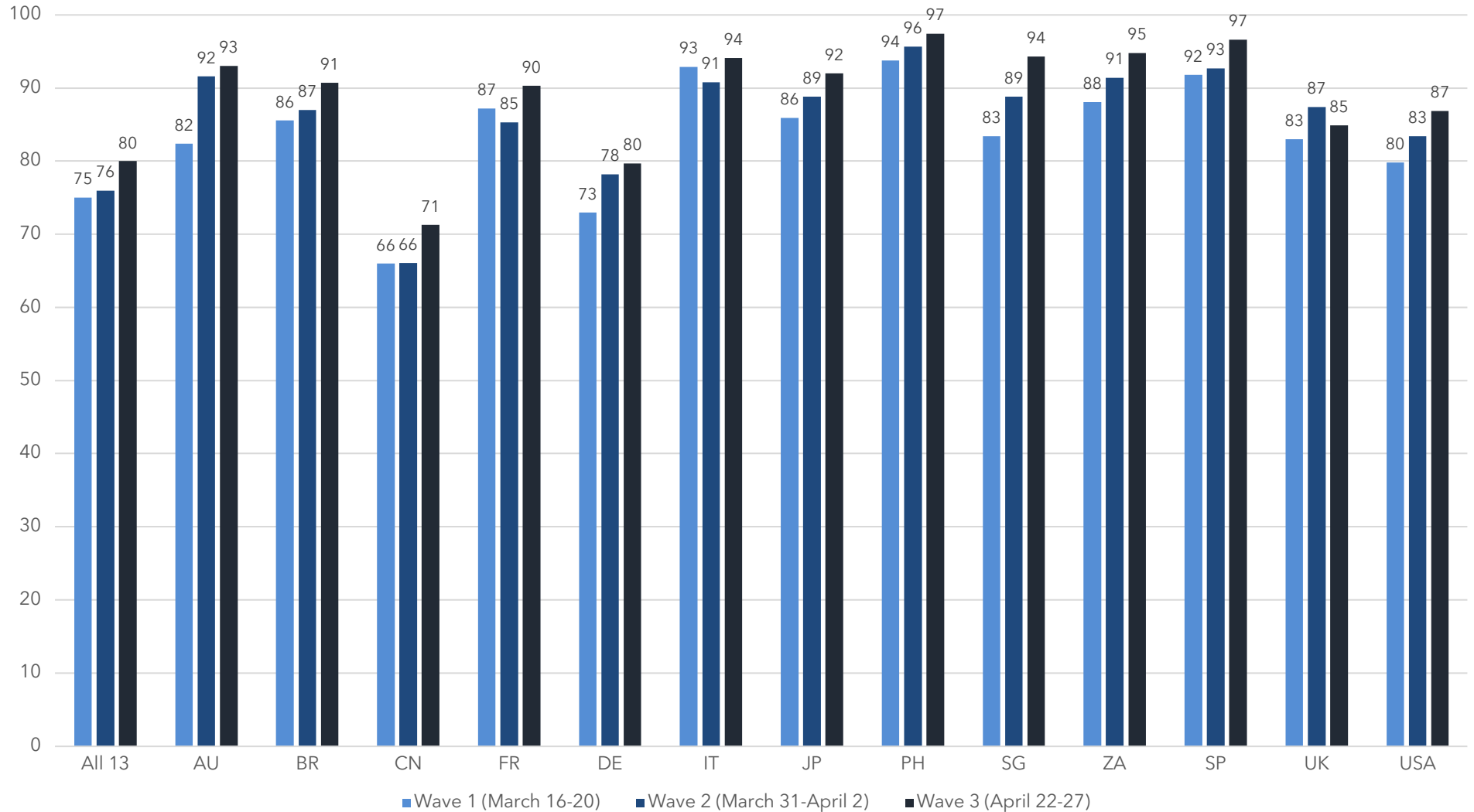
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
No impact	3	1	1	1	2	1	1	2
Small impact	13	14	13	10	13	14	14	14
Big impact	50	54	53	53	52	54	54	52
Dramatic impact	32	27	31	34	31	29	30	29
Not sure	3	3	3	2	2	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

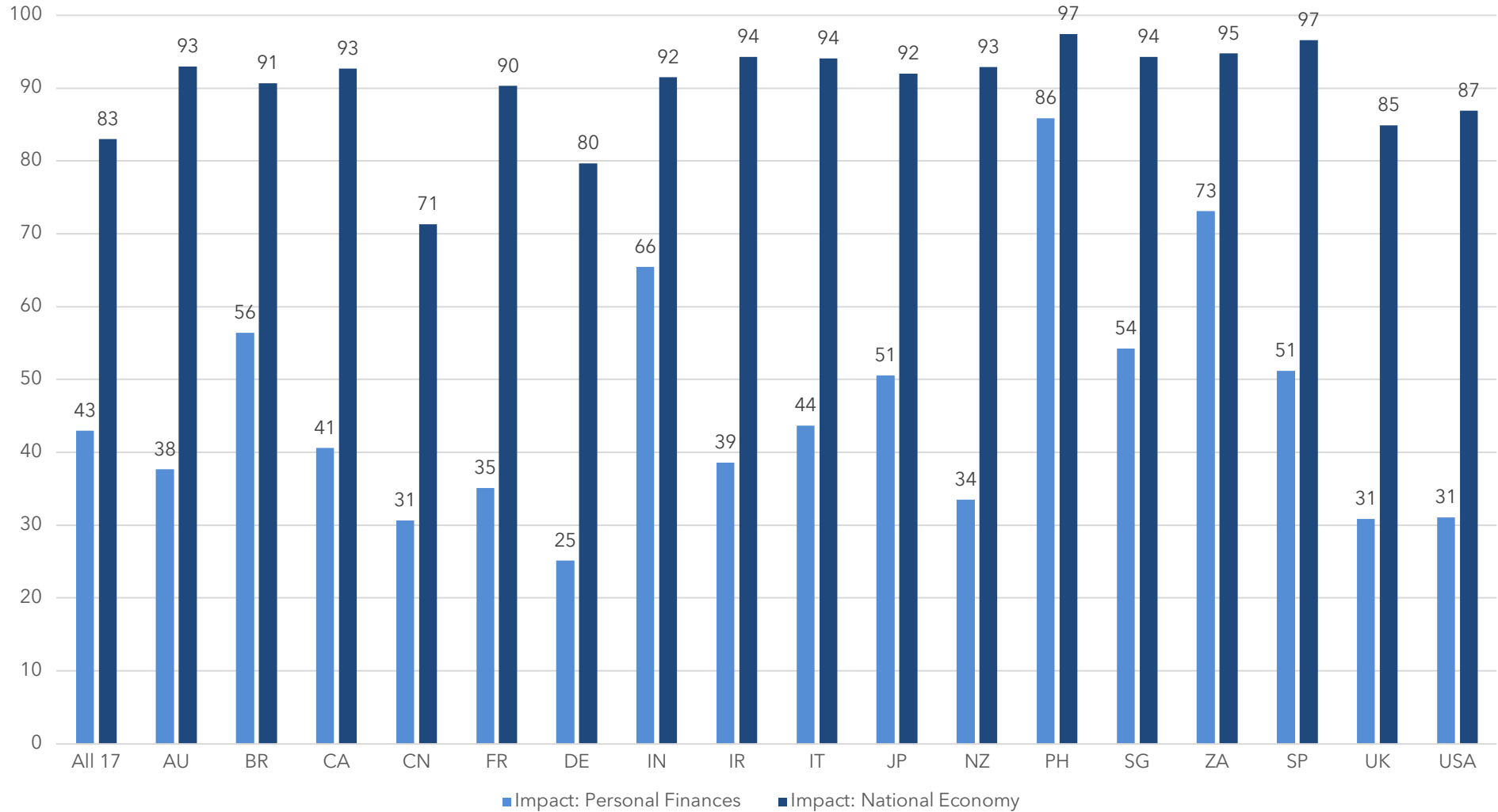
% who say they expect coronavirus / COVID-19 to have a dramatic or big effect on their country's economy



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 personal / household finances. 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	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
No impact	1	1	1	0	2	1	2	0	0	1	1	0	1	0	0	0	1	2
Small impact	5	3	5	3	5	7	6	4	3	7	2	3	1	3	2	2	6	7
Big impact	43	36	43	40	32	58	41	62	36	60	46	34	53	42	47	59	44	40
Dramatic impact	48	57	48	53	58	32	45	32	57	31	47	60	45	54	48	37	45	45
Not sure	4	4	3	3	4	3	6	2	3	2	5	3	1	2	3	2	5	5

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

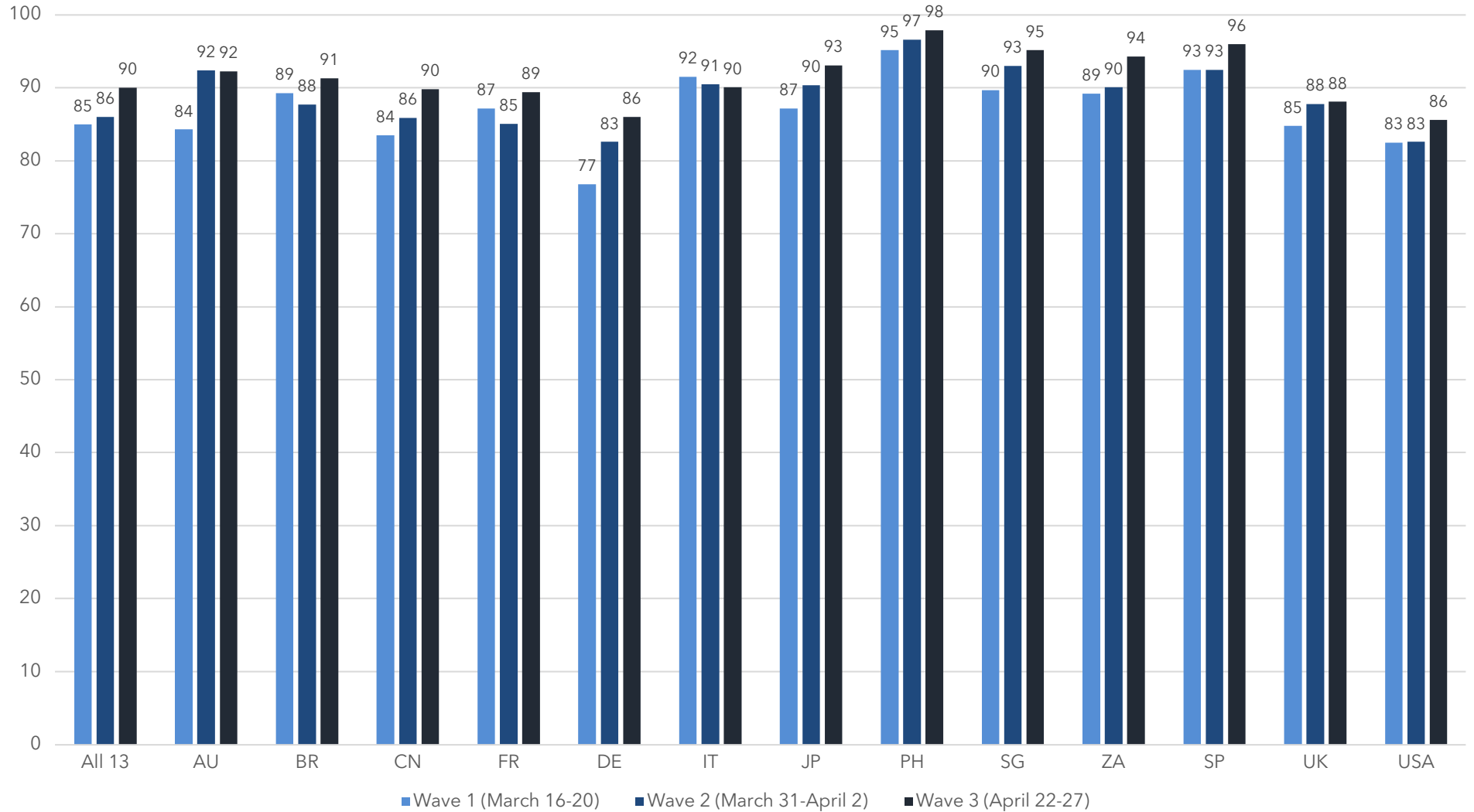
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
No impact	1	2	1	1	2	1	1	1
Small impact	6	5	3	3	5	5	5	5
Big impact	44	43	42	46	41	45	43	44
Dramatic impact	44	47	51	47	48	47	49	44
Not sure	5	3	3	3	4	3	1	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

Impact on Job

% who say the following has happened to them during the outbreak

	All	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Been temporarily laid off / placed on furlough	15	10	11	16	16	20	20	18	17	18	4	7	24	9	17	17	18	11
Had a bonus / pay rise deferred	13	7	5	7	19	4	6	16	5	5	3	6	7	13	6	3	7	6
Had a pay cut	24	8	18	11	35	19	10	28	7	9	8	15	14	16	19	9	7	9
Had your working hours reduced	22	24	28	21	17	13	11	38	16	19	24	24	26	23	25	18	13	17
Lost your job	7	7	7	8	4	4	5	13	5	4	5	4	21	9	11	8	3	3
None of these / Prefer not to say	42	56	45	52	37	56	62	23	58	57	64	58	27	48	38	52	61	64

% who say the following has happened to them during the outbreak*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Been temporarily laid off / placed on furlough	17	16	15	9	15	16	12	19
Had a bonus / pay rise deferred	12	16	10	4	12	14	16	10
Had a pay cut	25	27	21	11	22	25	25	21
Had your working hours reduced	25	24	18	12	19	25	26	20
Lost your job	10	6	5	3	7	6	4	12
None of these / Prefer not to say	35	37	49	68	45	39	42	42

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

Personal Financial Response

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

	All	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Cut back on the day-to-day things you buy	41	49	59	60	32	48	26	43	49	51	52	49	52	53	58	38	41	50
Delay big purchases (e.g. car, vacations, home appliances, etc)	80	69	78	71	86	68	58	92	77	74	43	62	84	81	84	76	67	68
Look for flexible payment options (e.g. pay in instalments, etc)	19	14	28	11	19	8	7	30	9	9	6	13	30	11	30	11	8	10
Wait for products to be on promotion, discount, sale, etc	32	37	40	41	32	24	25	34	32	32	22	33	24	40	38	28	27	29
Put more purchases on credit cards	14	11	20	16	16	3	5	19	8	3	14	9	7	9	10	14	8	10
Reduce regular financial commitments (e.g. cancel subscriptions, memberships, etc)	36	25	38	26	48	12	14	36	21	31	14	22	34	26	42	19	20	20
Take out a loan	6	2	7	3	6	4	3	10	4	4	3	2	16	4	10	3	3	2
Use your savings	35	30	31	32	36	17	17	56	25	27	24	27	62	35	41	29	24	15

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	35	41	45	46	43	39	40	41
Delay big purchases (e.g. car, vacations, home appliances, etc)	86	84	73	65	78	81	85	72
Look for flexible payment options (e.g. pay in instalments, etc)	27	20	13	8	17	20	20	18
Wait for products to be on promotion, discount, sale, etc	30	34	30	28	35	29	29	31
Put more purchases on credit cards	14	16	13	12	14	15	18	12
Reduce regular financial commitments (e.g. cancel subscriptions, memberships, etc)	39	39	32	22	34	37	38	33
Take out a loan	8	7	5	2	6	7	7	6
Use your savings	46	36	29	20	35	35	33	39

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	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Car / vehicle	20	20	20	20	22	12	9	28	13	15	5	10	12	10	24	16	15	18
Clothes	32	28	35	31	27	33	20	51	37	39	15	29	44	25	52	40	25	24
Flights	31	37	35	33	33	19	23	33	46	24	14	30	24	45	29	32	29	34
Home appliances / devices (e.g. TV, white goods)	23	19	27	17	22	13	12	39	13	20	9	14	28	20	33	18	13	12
Home furnishings (e.g. bed, sofa, etc)	19	19	23	19	18	15	11	28	18	19	5	12	19	18	35	19	13	12
Insurance	8	5	6	4	7	3	6	15	5	9	2	4	9	8	12	5	6	5
Luxury items (e.g. designer clothes, shoes, fragrances, etc)	25	18	17	14	31	9	12	37	15	11	6	13	17	21	39	17	12	13
Personal electronics (e.g. laptop, tablet, PC, etc)	24	20	27	18	23	10	12	41	15	16	5	14	33	22	37	18	13	14
Smartphone	24	17	24	13	22	9	10	45	13	17	6	11	30	23	30	16	11	12
Smart devices (e.g. smart- watches, fitness trackers, etc)	16	10	13	8	16	6	5	32	7	8	3	8	18	13	21	10	6	4
Vacations / trips	52	47	39	51	60	48	42	49	54	47	26	43	49	59	46	55	46	49
None of these	17	30	18	26	12	28	39	6	19	21	53	32	11	17	12	21	31	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*

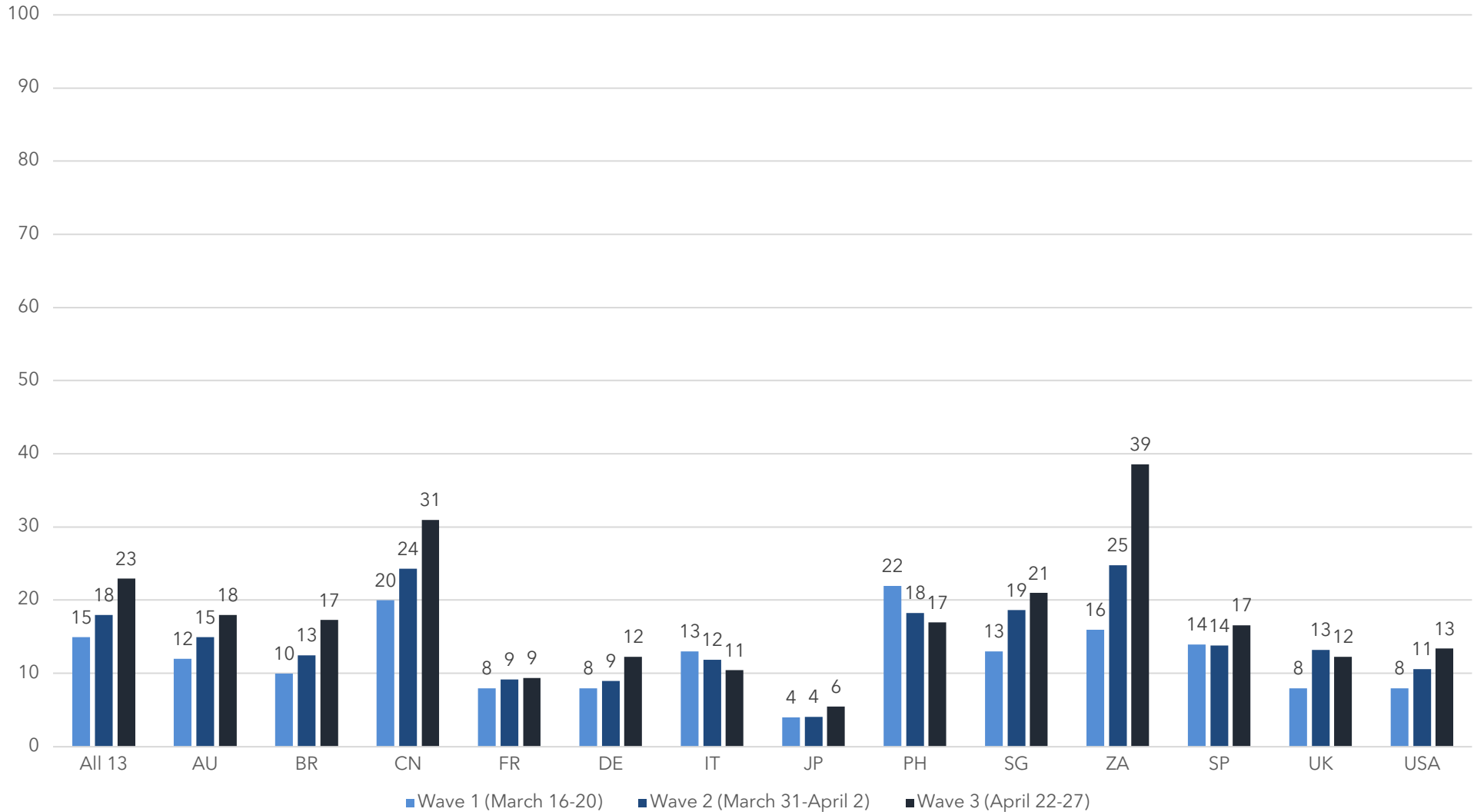
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Car / vehicle	19	23	19	15	18	22	26	18
Clothes	43	32	26	22	33	31	29	34
Flights	28	35	29	29	30	32	44	22
Home appliances / devices (e.g. TV, white goods)	24	26	20	14	22	24	23	22
Home furnishings (e.g. bed, sofa, etc)	17	21	18	14	19	18	23	17
Insurance	9	9	5	3	7	8	6	10
Luxury items (e.g. designer clothes, shoes, fragrances, etc)	23	30	23	12	28	23	32	20
Personal electronics (e.g. laptop, tablet, PC, etc)	33	26	17	11	22	25	22	27
Smartphone	33	24	18	10	21	26	22	28
Smart devices (e.g. smartwatches, fitness trackers, etc)	21	18	12	7	13	18	16	17
Vacations / trips	47	55	51	49	51	52	62	36
None of these	10	14	25	33	18	17	14	23

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

Delay to Luxury Purchases: Trended Data

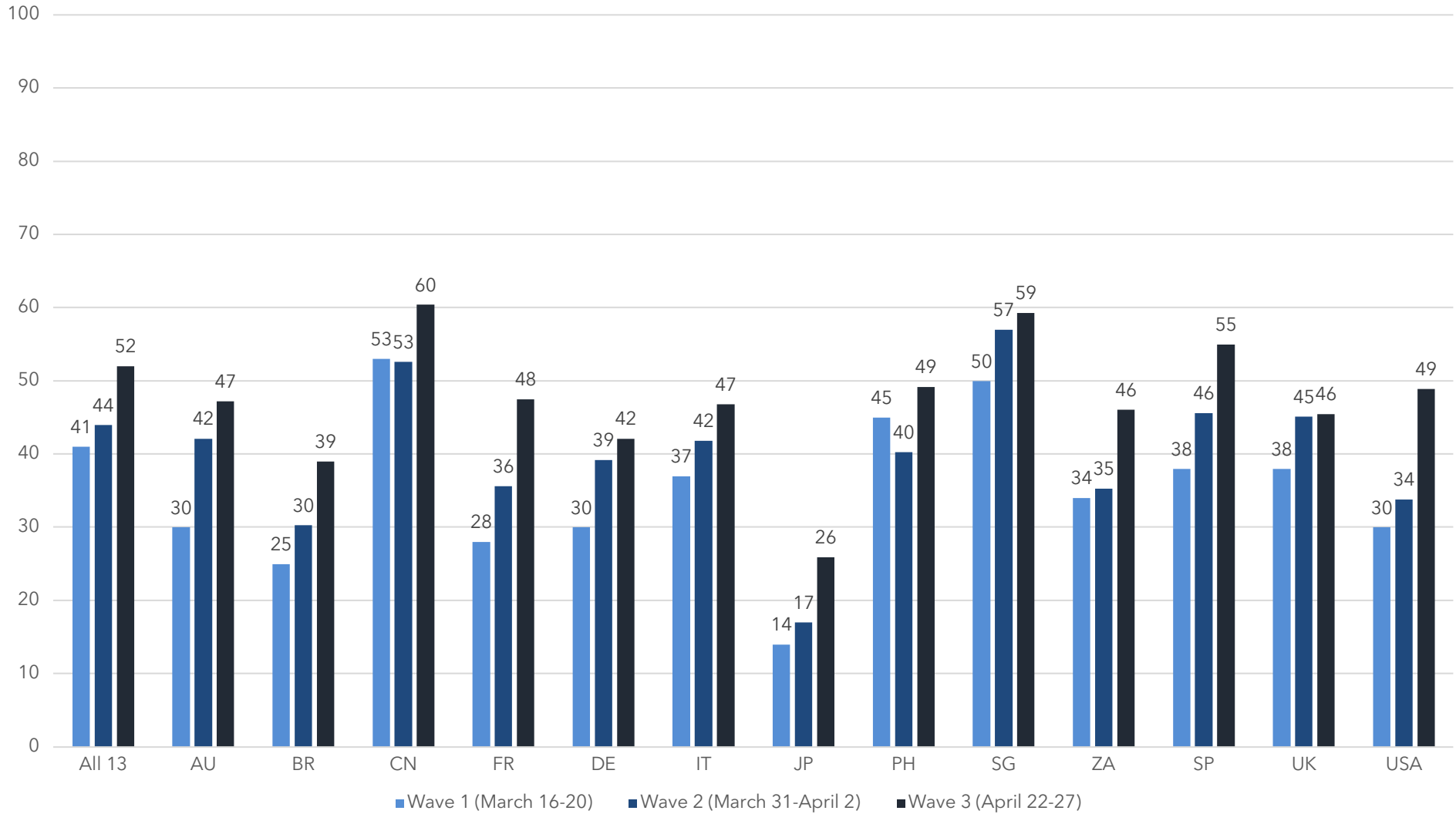
% who say they've delayed purchasing luxury items (e.g. designer clothes, shoes, fragrances, etc.) as a result of the coronavirus / COVID-19 outbreak



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	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
When the outbreak begins to decrease in my country	21	9	18	8	27	19	11	22	8	18	9	12	11	8	16	15	12	13
When the outbreak is over in my country	28	21	27	24	27	22	17	40	21	25	18	18	34	18	33	28	21	24
When the outbreak begins to decrease globally	8	5	5	7	13	4	6	7	12	4	2	8	6	9	6	5	8	4
When the outbreak is over globally	13	18	13	17	12	9	8	18	17	12	10	11	31	32	18	7	14	10
Not sure	12	17	18	19	9	18	20	7	23	19	9	20	8	16	15	24	15	19

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

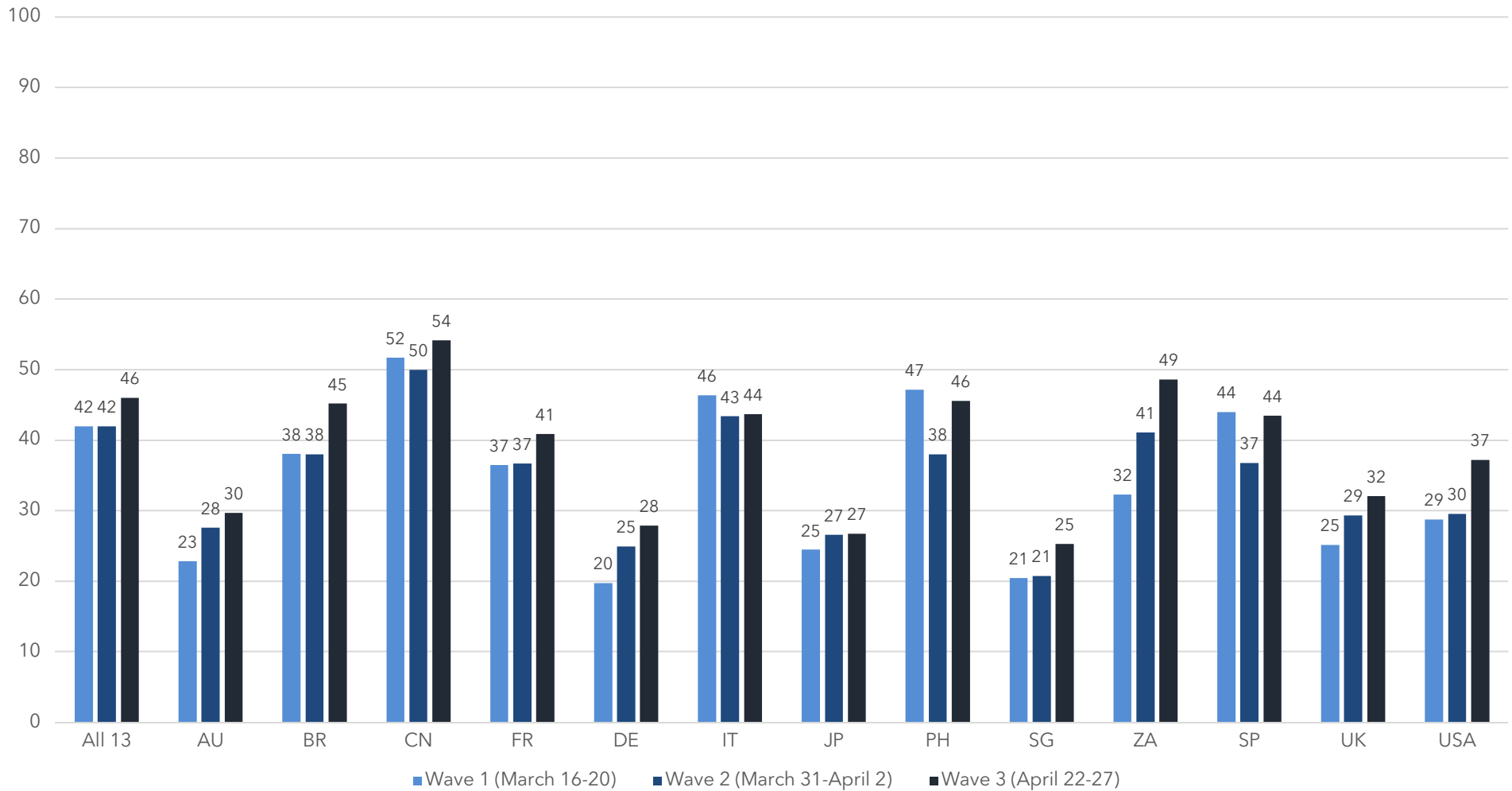
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
When the outbreak begins to decrease in my country	29	21	16	12	19	22	24	19
When the outbreak is over in my country	31	30	25	22	25	31	29	25
When the outbreak begins to decrease globally	8	10	8	5	10	7	10	8
When the outbreak is over globally	15	15	12	10	14	13	14	15
Not sure	9	11	15	19	14	10	10	11

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	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Car / vehicle	9	9	11	10	9	5	5	11	6	7	3	2	4	2	13	6	7	8
Clothes	17	12	16	15	14	21	12	30	17	21	9	17	19	6	30	24	11	9
Flights	8	11	13	8	6	5	8	8	19	7	6	12	6	14	5	8	10	11
Home appliances / devices (e.g. TV, white goods)	12	7	12	6	13	7	5	17	3	9	7	8	14	8	10	6	6	6
Home furnishings (e.g. bed, sofa, etc)	7	6	9	8	6	6	4	9	7	8	2	4	7	7	12	8	5	6
Insurance	3	2	1	1	3	2	2	8	3	6	1	2	6	5	4	2	3	1
Luxury items (e.g. designer clothes, shoes, fragrances, etc)	6	2	2	1	7	2	2	10	0	1	2	2	2	3	6	2	3	2
Personal electronics (e.g. laptop, tablet, PC, etc)	11	6	11	6	13	6	5	17	7	5	3	5	17	10	13	7	5	5
Smartphone	13	6	12	6	13	3	5	25	4	7	3	5	14	9	11	7	5	4
Smart devices (e.g. smart-watches, fitness trackers, etc)	5	2	3	2	5	1	1	10	0	1	1	2	3	3	3	2	2	1
Vacations / trips	23	27	19	26	26	27	27	15	27	23	18	21	21	35	11	25	30	30

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	7	10	8	5	7	10	12	6
Clothes	25	17	13	9	17	17	13	20
Flights	7	9	6	11	7	8	12	5
Home appliances / devices (e.g. TV, white goods)	10	14	10	7	11	12	12	11
Home furnishings (e.g. bed, sofa, etc)	4	8	7	5	7	6	8	6
Insurance	4	4	3	1	3	4	3	5
Luxury items (e.g. designer clothes, shoes, fragrances, etc)	5	7	5	2	6	5	9	3
Personal electronics (e.g. laptop, tablet, PC, etc)	16	13	7	3	10	12	11	13
Smartphone	20	12	9	5	11	14	12	16
Smart devices (e.g. smartwatches, fitness trackers, etc)	5	6	3	1	4	5	5	3
Vacations / trips	18	24	26	29	24	23	31	15

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.

Delayed Purchases: Technology Devices

% who say they will do the following in relation to technology devices they have delayed purchasing

	All	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Buy the ones you originally wanted at full price	8	3	5	2	9	2	4	16	4	2	3	2	10	2	11	3	2	3
Look for cheaper options from other brands	5	5	6	5	4	3	2	9	6	5	3	3	10	7	8	5	3	2
Look for cheaper options from your favorite brand	9	5	8	6	8	3	3	18	6	5	4	5	12	8	12	6	4	5
Wait for promotions / offers	18	17	22	15	20	12	10	26	11	19	2	12	22	20	21	16	12	10

% who say they will do the following in relation to technology devices they have delayed purchasing*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Buy the ones you originally wanted at full price	14	9	5	1	6	10	8	9
Look for cheaper options from other brands	8	5	4	2	4	6	5	5
Look for cheaper options from your favorite brand	13	10	7	3	7	10	8	11
Wait for promotions / offers	22	20	15	11	19	18	17	21

Question: Thinking about these delayed purchases, what do you think you will do? Technology devices (e.g. smartphones, tablets, laptops, etc). NOTE: Respondents only saw this question if they said they had delayed a purchase of a personal electronic device, a smart device, or a smartphone in the "Delayed Purchases" question.

Delayed Purchases: Luxury Items

% who say they will do the following in relation to luxury items they have delayed purchasing

	All	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Buy the ones you originally wanted at full price	4	1	2	2	4	2	2	8	1	1	1	1	2	1	3	1	2	1
Look for cheaper options from other brands	6	2	4	2	7	1	2	8	5	2	1	3	5	5	11	4	3	3
Look for cheaper options from your favorite brand	6	3	4	2	6	1	2	10	3	2	2	3	4	4	7	3	2	3
Wait for promotions / offers	10	12	7	9	14	5	7	11	6	6	1	6	6	10	17	8	6	6

% who say they will do the following in relation to luxury items they have delayed purchasing*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Buy the ones you originally wanted at full price	4	5	3	1	3	5	6	3
Look for cheaper options from other brands	6	6	5	3	6	5	8	5
Look for cheaper options from your favorite brand	7	7	4	2	6	5	7	4
Wait for promotions / offers	6	12	11	6	12	9	11	8

Question: Thinking about these delayed purchases, what do you think you will do? Luxury items (e.g. designer clothes, shoes, fragrances, etc). NOTE: Respondents only saw this question if they said they had delayed a purchase of luxury items in the "Delayed Purchases" question.

Vacation Booking

% who say the following would give them confidence to start traveling again

	All	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Countries re-opening their borders	28	31	21	30	36	27	30	26	29	17	19	29	20	33	25	22	29	18
Feeling secure in my job / finances	28	23	31	25	31	24	17	26	19	29	27	22	31	32	29	29	19	21
The government lifting "lockdown" or "stay-at-home" restrictions	31	35	25	31	31	29	25	37	26	24	21	25	27	26	24	27	34	31
Travel advice being provided by the government	31	40	17	33	37	10	24	39	35	11	18	36	27	42	25	13	38	19
When I feel it's safe to travel	58	54	61	58	54	53	50	60	67	66	65	63	67	64	58	52	58	68
Other	5	7	7	9	3	12	11	2	3	5	9	6	3	3	5	8	6	10

% who say the following would give them confidence to start traveling again*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Countries re-opening their borders	24	31	28	24	29	27	33	25
Feeling secure in my job / finances	28	30	27	17	29	26	28	29
The government lifting "lockdown" or "stay-at-home" restrictions	32	32	30	27	29	32	35	30
Travel advice being provided by the government	32	32	29	24	31	30	33	27
When I feel it's safe to travel	54	59	60	65	60	57	58	51
Other	4	5	6	8	6	4	3	7

Question: What would give you confidence to begin traveling again?

Post-Outbreak Vacation Behaviors

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

	All	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Have more staycations / trips in your local area	31	23	11	29	42	19	19	28	23	24	25	26	26	16	24	24	20	23
Make use of promotions / discounts when booking vacations	24	20	30	21	25	14	14	30	19	17	11	18	24	36	32	18	17	25
Take cheaper vacations	15	14	23	13	9	14	10	26	16	17	14	15	27	19	24	17	10	13
Take fewer vacations	23	16	13	25	26	10	20	33	22	16	7	15	25	19	28	18	15	17
Take more vacations in your country (rather than abroad)	29	31	22	24	37	26	27	27	30	34	18	36	22	10	29	31	22	18
Take more short-haul vacations (within a 3-hour flight of your country)	20	13	16	11	25	14	8	23	14	13	12	12	11	21	12	12	12	15
Take more budget airline flights	10	11	16	8	8	5	3	19	8	8	7	6	14	13	14	8	8	8
None of these	18	28	26	26	9	34	34	14	23	18	36	30	18	23	19	23	33	33

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

Post-Outbreak Vacation Behaviors

% 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
	%	%	%	%	%	%	%	%
Have more staycations / trips in your local area	28	32	32	29	32	31	30	30
Make use of promotions / discounts when booking vacations	25	27	22	18	26	23	28	21
Take cheaper vacations	17	16	13	12	15	15	14	17
Take fewer vacations	28	24	21	19	21	25	22	25
Take more vacations in your country (rather than abroad)	28	30	29	25	28	30	37	20
Take more short-haul vacations (within a 3-hour flight of your country)	19	23	17	13	20	20	26	15
Take more budget airline flights	13	12	7	5	10	11	13	11
None of these	13	17	22	31	20	17	15	21

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

Post-Outbreak Leisure Behaviors

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

	All	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Cancel a gym membership	11	8	6	6	12	5	9	17	7	9	4	6	5	8	13	8	7	10
Eat out at restaurants less often	42	21	33	36	47	19	32	54	28	36	16	29	43	30	48	37	26	32
Eat at fast-food outlets less often	31	17	25	28	31	21	25	50	25	23	9	33	54	20	46	27	18	19
Visit bars / pubs less often	29	18	25	21	35	15	24	31	27	30	8	19	19	17	35	37	22	20
Visit the cinema less often	31	14	27	21	33	16	23	47	16	25	7	17	29	17	28	26	16	21
None of these	33	63	41	49	24	63	51	16	47	45	75	56	22	54	24	41	57	52

% 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	16	12	8	6	10	13	11	13
Eat out at restaurants less often	46	41	40	35	41	42	40	42
Eat at fast-food outlets less often	41	32	25	23	31	32	30	34
Visit bars / pubs less often	28	32	26	21	26	31	33	23
Visit the cinema less often	35	31	29	23	29	33	30	30
None of these	22	30	42	53	35	31	34	28

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	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Exercise at home more frequently	41	26	34	27	48	19	23	51	33	29	15	29	55	25	45	31	25	27
Shop online more frequently	43	25	48	35	49	22	28	52	30	34	22	34	37	32	49	29	28	31
Use food delivery services more frequently (e.g. Uber Eats, Just Eat, Deliveroo, etc)	21	10	31	13	21	8	12	36	8	15	6	9	28	15	33	12	10	9
Use mobile payment services more frequently	34	13	31	17	41	10	18	54	19	10	3	14	48	22	41	16	11	15
Use video calling more frequently (e.g. FaceTime, WhatsApp video, etc)	31	16	28	24	35	16	22	47	26	25	4	24	27	17	36	30	23	18
Use video conferencing platforms more frequently (e.g. Zoom, Hangouts, etc)	23	15	23	20	24	9	13	36	16	14	6	19	19	19	24	15	15	18
Work from home more frequently	24	17	27	24	19	15	20	41	23	22	10	25	39	22	38	23	18	22
None of these	18	40	17	33	10	42	37	5	26	26	59	30	4	34	9	28	36	33

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

Post-Outbreak Behavior Increases

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

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Exercise at home more frequently	45	44	35	27	41	41	43	37
Shop online more frequently	44	45	42	34	43	44	45	40
Use food delivery services more frequently (e.g. Uber Eats, Just Eat, Deliveroo, etc)	29	24	15	9	19	24	24	20
Use mobile payment services more frequently	41	35	31	22	30	38	36	31
Use video calling more frequently (e.g. FaceTime, WhatsApp video, etc)	36	33	28	22	31	31	35	30
Use video conferencing platforms more frequently (e.g. Zoom, Hangouts, etc)	29	25	19	12	20	25	30	21
Work from home more frequently	28	26	22	12	23	26	28	23
None of these	8	14	24	42	19	16	15	19

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

Post-Outbreak Shopping Behaviors

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

	All	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Buy more online for home delivery	40	21	42	28	48	17	26	47	25	32	15	29	40	26	44	34	25	26
Buy more online for in-store collection	22	13	23	14	24	15	9	31	14	14	6	16	20	14	24	14	13	15
Spend more time browsing / researching online before visiting stores	27	21	36	27	21	14	18	47	26	22	11	27	42	26	33	22	18	19
Visit stores less frequently	32	22	26	32	31	23	34	43	30	29	15	30	39	20	43	31	28	30
Spend less time inside stores	32	20	30	26	35	27	35	38	33	33	15	26	33	20	45	31	24	26
Make more use of self-service check-outs	19	15	14	17	18	10	14	32	17	11	8	19	19	21	24	11	14	16
None of these	20	42	19	34	12	41	31	7	28	30	57	36	8	34	12	29	40	40

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

Post-Outbreak Shopping Behaviors

% 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
	%	%	%	%	%	%	%	%
Buy more online for home delivery	39	43	39	30	40	40	42	38
Buy more online for in-store collection	22	26	18	12	19	24	27	19
Spend more time browsing / researching online before visiting stores	32	28	23	19	25	28	28	27
Visit stores less frequently	35	31	32	31	33	32	34	30
Spend less time inside stores	36	31	31	31	33	32	33	31
Make more use of self-service check-outs	22	21	15	12	18	20	22	18
None of these	11	18	25	36	20	20	19	18

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

Products for Delivery / In-Store Collection

% who say they will be more likely to order the following online for home delivery or in-store collection

	All	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Alcohol	11	10	15	10	12	7	7	11	8	6	5	13	18	9	18	7	10	9
Clothes	29	14	29	19	36	15	22	35	19	23	9	18	24	13	26	24	18	17
Cosmetics / beauty products	22	10	27	13	28	12	12	26	10	17	6	13	16	11	20	15	11	11
Food / grocery products	27	14	26	17	29	15	10	42	17	16	11	23	28	24	34	16	20	18
Household essentials (e.g. household cleaner, toilet tissue)	30	11	22	20	40	12	14	35	12	18	9	18	26	21	31	14	16	20
Personal care products (e.g. toothpaste, shampoo)	30	11	24	21	39	13	12	37	12	17	10	15	22	17	26	15	13	20
Personal electronics (e.g. laptop, tablet, PC, etc)	22	10	30	20	26	11	16	27	12	22	6	13	15	9	26	18	12	14
Smartphone	23	9	32	12	28	9	13	31	12	19	4	10	11	10	24	15	11	9
Smart devices (e.g. smartwatches, fitness trackers, etc)	18	7	20	12	23	6	8	25	9	14	4	9	10	7	19	12	8	10
Other	2	2	5	2	1	2	3	1	1	4	3	2	4	1	3	3	1	2

Question: Which types of product would you be more likely to order online for home delivery or in-store pickup? Respondents saw this question only if they said they expected to order more items online for delivery or in-store collection. Alcohol was shown to those 18+, or 21+ in the U.S.

Products for Delivery / In-Store Collection

% who say they will be more likely to order the following online for home delivery or in-store collection*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Alcohol	10	13	11	7	11	12	14	9
Clothes	33	30	27	18	31	28	32	28
Cosmetics / beauty products	23	24	20	12	28	17	27	21
Food / grocery products	27	29	25	21	27	27	30	25
Household essentials (e.g. household cleaner, toilet tissue)	27	33	30	22	32	28	34	26
Personal care products (e.g. toothpaste, shampoo)	31	32	29	21	32	29	36	25
Personal electronics (e.g. laptop, tablet, PC, etc)	20	25	21	15	20	24	26	18
Smartphone	24	26	20	14	20	26	26	21
Smart devices (e.g. smartwatches, fitness trackers, etc)	18	22	16	9	16	20	23	13
Other	1	1	3	2	2	2	2	2

Question: Which types of product would you be more likely to order online for home delivery or in-store pickup? Respondents saw this question only if they said they expected to order more items online for delivery or in-store collection. Alcohol was shown to those 18+, or 21+ in the U.S.

Factors Influencing Online Shopping

% who say they expect the following online shopping features to be more important to them than previously

	All	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Free delivery	51	56	67	62	40	53	40	60	56	64	49	59	74	70	63	62	48	53
Free returns policy	42	31	31	42	49	29	24	47	36	40	18	33	46	43	43	39	30	35
Long returns policy	21	15	17	24	23	12	12	32	15	18	10	14	24	16	17	15	15	14
Reliable delivery	51	41	56	40	60	31	23	52	45	42	39	48	59	52	64	45	40	39
Reliable website	41	37	67	34	37	32	27	45	38	51	47	41	51	48	50	42	31	30
Same- or next-day delivery	28	17	21	22	34	12	8	36	14	16	10	24	39	26	46	21	16	20
None of these	9	21	5	15	5	22	34	3	16	8	16	17	2	7	7	11	22	23

Question: Thinking about online shopping, which of these will be more important to you in the future than they used to be?

Factors Influencing Online Shopping

% who say they expect the following online shopping features to be more important to them than previously*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Free delivery	50	50	51	52	51	50	50	50
Free returns policy	46	42	40	35	43	42	42	40
Long returns policy	25	22	19	14	22	21	22	22
Reliable delivery	53	53	50	42	50	53	53	46
Reliable website	41	41	41	38	39	42	44	37
Same- or next-day delivery	30	32	25	16	28	29	31	25
None of these	3	9	12	19	9	9	8	10

Question: Thinking about online shopping, which of these will be more important to you in the future than they used to be?

Factors Influencing Support for Brands / Businesses

% who say the following will influence the brands / businesses they will buy from after the outbreak is over

	All	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Those with the cheapest prices	30	40	52	44	20	31	30	35	38	42	23	50	42	45	47	37	33	32
Those which best meet my needs	56	49	56	55	62	46	30	53	48	48	49	54	61	57	57	55	44	52
Those I've bought from previously	36	36	30	40	38	34	48	33	39	33	17	40	32	35	40	36	36	40
Those which are local / independent	23	35	22	39	18	34	24	28	36	22	5	42	25	19	29	24	28	32
Those that contacted me during the outbreak	17	10	15	10	22	6	8	25	8	6	6	8	12	11	16	9	13	8
Those that helped people during the outbreak	38	25	41	32	46	20	16	38	38	25	12	21	42	20	36	29	33	30
Those with the best product availability	39	32	38	33	42	25	22	46	28	27	23	33	50	37	43	24	30	37
Other	4	6	4	4	1	6	13	2	3	4	18	4	3	5	4	5	6	9

Question: Which factors will influence the brands / businesses you buy from after the outbreak is over?

Factors Influencing Support for Brands / Businesses

% who say the following will influence the brands / businesses they will buy from after the outbreak is over*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Those with the cheapest prices	30	29	30	30	30	30	25	31
Those which best meet my needs	53	56	57	60	55	57	56	51
Those I've bought from previously	34	35	37	42	36	35	34	36
Those which are local / independent	23	23	22	28	23	23	27	22
Those that contacted me during the outbreak	23	19	13	9	16	19	22	15
Those that helped people during the outbreak	41	39	35	30	39	37	42	30
Those with the best product availability	38	41	38	34	38	40	43	32
Other	2	4	5	6	4	4	3	5

Question: Which factors will influence the brands / businesses you buy from after the outbreak is over?

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	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Immediately	9	13	9	10	6	8	14	15	14	9	5	8	11	8	12	8	14	10
Very quickly	18	19	10	14	22	15	14	21	16	10	25	13	9	17	10	10	19	13
Quite quickly	15	30	15	22	10	23	21	16	23	15	6	28	23	26	22	17	26	20
Not for some time	37	20	35	34	42	28	34	34	26	42	38	33	40	29	37	36	22	30
Not for a long time	10	4	14	6	10	14	8	9	7	12	6	5	9	5	6	10	5	9
Not sure	11	15	18	14	9	12	10	5	14	13	20	15	9	16	13	20	15	17

% 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	10	10	8	8	8	11	11	10
Very quickly	22	19	16	12	18	19	20	16
Quite quickly	14	15	15	15	14	15	16	16
Not for some time	37	37	37	37	38	36	37	34
Not for a long time	9	10	10	10	9	10	9	11
Not sure	8	9	15	19	13	9	8	13

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

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	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Immediately	4	7	6	4	2	5	7	8	5	5	4	2	5	5	3	5	8	5
Very quickly	10	13	10	8	9	9	6	14	4	6	11	4	6	7	7	6	9	7
Quite quickly	9	14	10	8	6	13	9	14	9	6	4	10	11	14	5	8	14	7
Not for some time	32	32	32	32	34	21	24	30	38	28	34	34	34	39	33	37	29	30
Not for a long time	32	16	26	31	37	36	39	26	28	37	28	28	28	17	37	27	23	29
Not sure	14	19	17	18	12	16	15	7	16	19	19	23	17	18	16	17	17	22

% 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	4	5	4	2	4	5	6	3
Very quickly	11	12	7	5	8	11	12	11
Quite quickly	12	9	7	6	7	10	9	10
Not for some time	32	32	31	30	32	32	34	27
Not for a long time	32	30	33	37	34	30	30	30
Not sure	10	12	18	21	15	13	9	18

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 Locations: Outdoor Venues

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

	All	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Immediately	6	7	13	4	4	5	6	9	4	5	4	3	4	4	4	9	7	5
Very quickly	10	8	11	7	11	10	7	13	6	5	10	2	5	7	5	8	9	6
Quite quickly	10	11	15	9	10	12	7	11	7	5	3	10	9	10	6	9	10	9
Not for some time	31	31	28	29	34	24	22	27	32	26	34	27	31	37	34	34	27	31
Not for a long time	28	19	19	32	26	33	42	30	33	38	28	35	31	22	36	23	26	27
Not sure	16	24	15	19	15	17	16	10	19	21	21	23	20	20	15	17	21	22

% 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	7	7	5	3	5	7	7	7
Very quickly	11	12	9	5	9	11	13	11
Quite quickly	13	9	9	7	8	11	10	11
Not for some time	32	31	30	29	32	29	33	25
Not for a long time	26	28	27	34	27	28	26	25
Not sure	12	13	20	22	18	14	10	21

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

Levels of Approval - Large Corporations

% who say they approve / disapprove of how large corporations have handled the coronavirus / COVID-19 outbreak

Large corporations	All	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	26	11	36	12	27	16	12	40	11	21	9	10	30	10	28	19	11	17
Somewhat approve	48	46	38	41	61	36	34	42	44	48	33	40	49	44	41	34	39	34
Neither approve nor disapprove	19	33	17	34	11	35	39	11	36	24	45	40	18	38	22	33	39	35
Somewhat disapprove	4	6	6	8	1	8	10	4	6	4	6	8	3	6	5	8	7	8
Strongly disapprove	3	4	3	5	0	6	5	4	2	4	6	3	1	2	4	7	4	7

% who say they approve / disapprove of how large corporations* have handled the coronavirus / COVID-19 outbreak

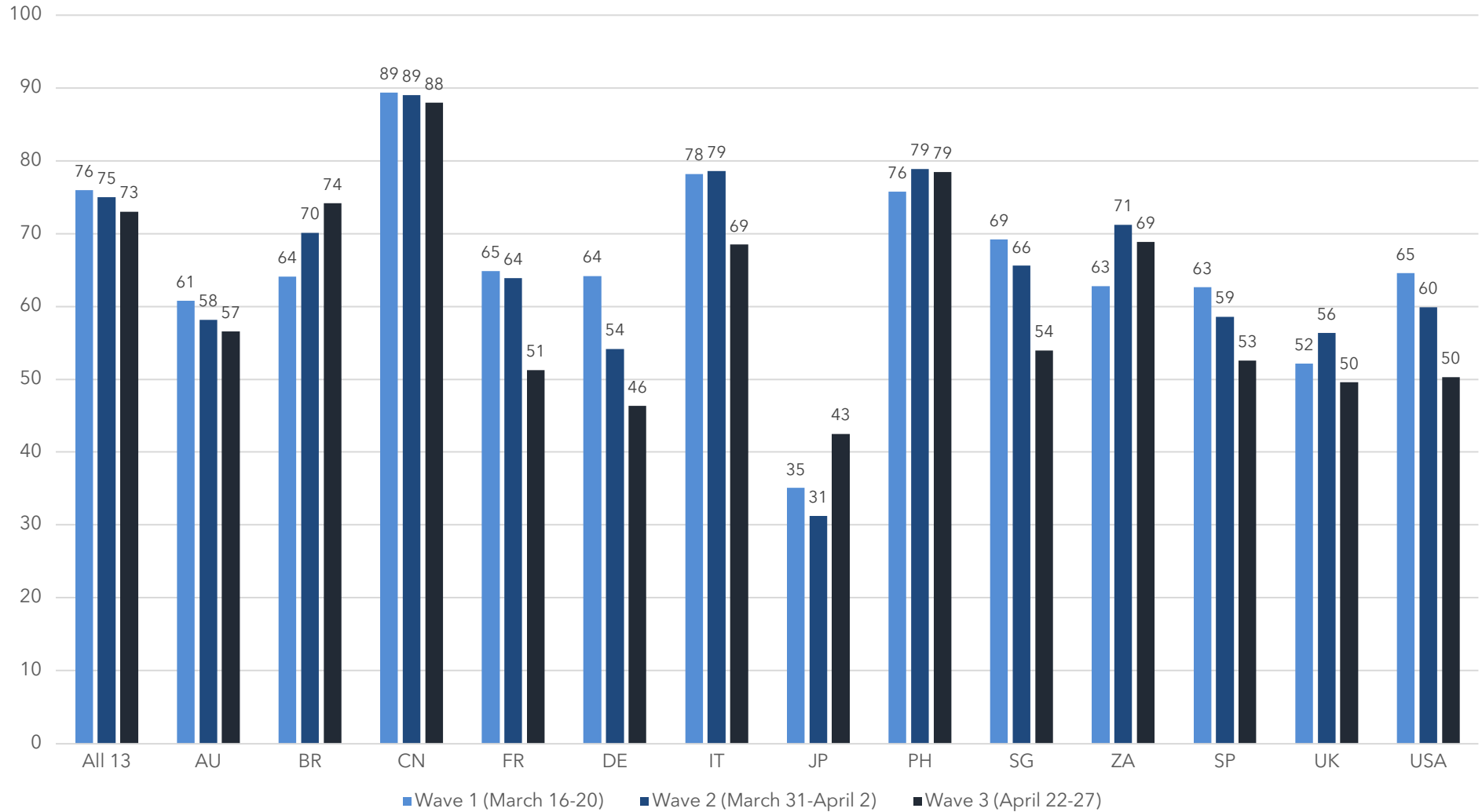
*Using all country data

Large corporations	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly approve	32	28	22	17	26	27	29	27
Somewhat approve	50	47	48	44	47	48	47	47
Neither approve nor disapprove	13	18	24	30	21	18	18	20
Somewhat disapprove	3	4	4	5	4	4	4	4
Strongly disapprove	3	3	3	3	2	3	2	3

Question: How much do you approve / disapprove of how the following have handled the coronavirus / COVID-19 outbreak so far? Large corporations

Levels of Approval - Large Corporations: Trended Data

% who say they strongly or somewhat approve of how large corporations have handled the coronavirus / COVID-19 outbreak



Question: How much do you approve / disapprove of how the following have handled the coronavirus / COVID-19 outbreak so far? Large corporations. Chart illustrates combined responses for Strongly Approve, Somewhat Approve

Levels of Approval - Your Country's Government

% who say they approve / disapprove of how their country's government have handled the coronavirus / COVID-19 outbreak

Country's government	All	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	47	33	19	33	68	12	24	63	39	22	3	65	40	30	49	12	18	16
Somewhat approve	28	40	28	42	27	30	42	24	41	40	17	22	37	42	31	23	36	28
Neither approve nor disapprove	9	15	10	12	4	16	12	5	10	13	27	5	11	15	6	17	18	17
Somewhat disapprove	8	7	17	6	1	18	13	5	5	13	19	5	7	6	8	33	16	16
Strongly disapprove	9	5	26	8	1	25	10	4	5	13	34	3	5	7	5	16	12	23

% who say they approve / disapprove of how their country's government* have handled the coronavirus / COVID-19 outbreak

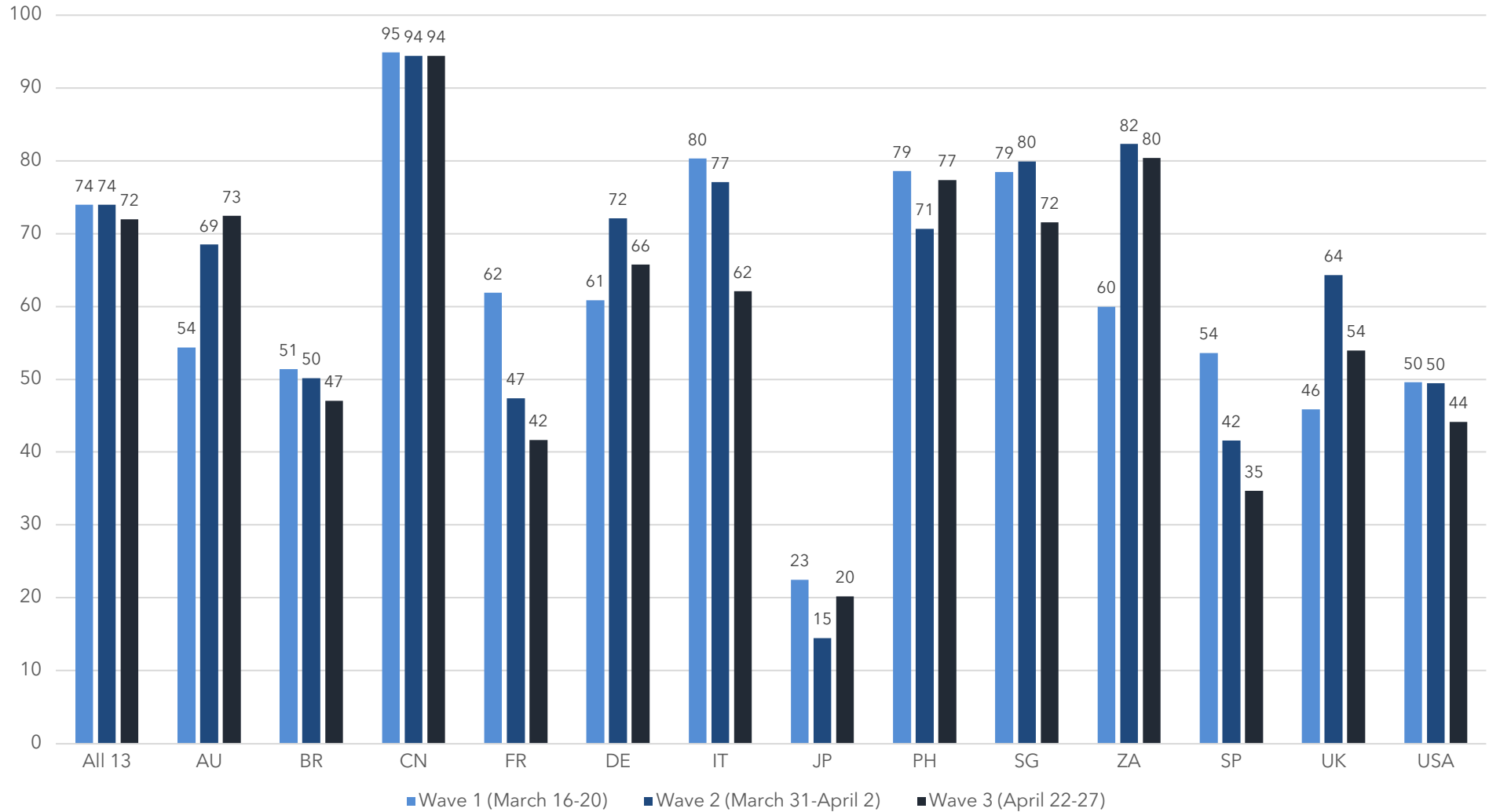
*Using all country data

Country's government	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly approve	53	49	43	34	45	49	44	49
Somewhat approve	29	27	28	28	28	28	29	28
Neither approve nor disapprove	6	9	10	10	10	8	9	9
Somewhat disapprove	6	8	9	11	9	7	8	7
Strongly disapprove	6	7	11	17	9	9	10	8

Question: How much do you approve / disapprove of how the following have handled the coronavirus / COVID-19 outbreak so far? Your country's government

Levels of Approval - Your Country's Government: Trended Data

% who say they strongly or somewhat approve of how their country's government have handled the coronavirus / COVID-19 outbreak



Question: How much do you approve / disapprove of how the following have handled the coronavirus / COVID-19 outbreak so far? Your country's government. Chart illustrates combined responses for Strongly Approve, Somewhat Approve

Levels of Approval - Your Country's Population

% who say they approve / disapprove of how their country's population have handled the coronavirus / COVID-19 outbreak

Country's population	All	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	28	17	13	19	41	13	14	32	25	18	3	34	17	11	13	30	15	11
Somewhat approve	40	46	28	46	48	30	47	36	47	45	19	49	32	40	26	40	42	31
Neither approve nor disapprove	15	22	12	21	9	20	17	12	13	16	36	11	19	30	19	18	25	28
Somewhat disapprove	12	11	29	10	1	25	16	14	12	15	25	5	24	14	26	4	14	23
Strongly disapprove	6	3	17	5	0	12	6	7	3	7	17	1	8	5	16	8	4	7

% who say they approve / disapprove of how their country's population* have handled the coronavirus / COVID-19 outbreak

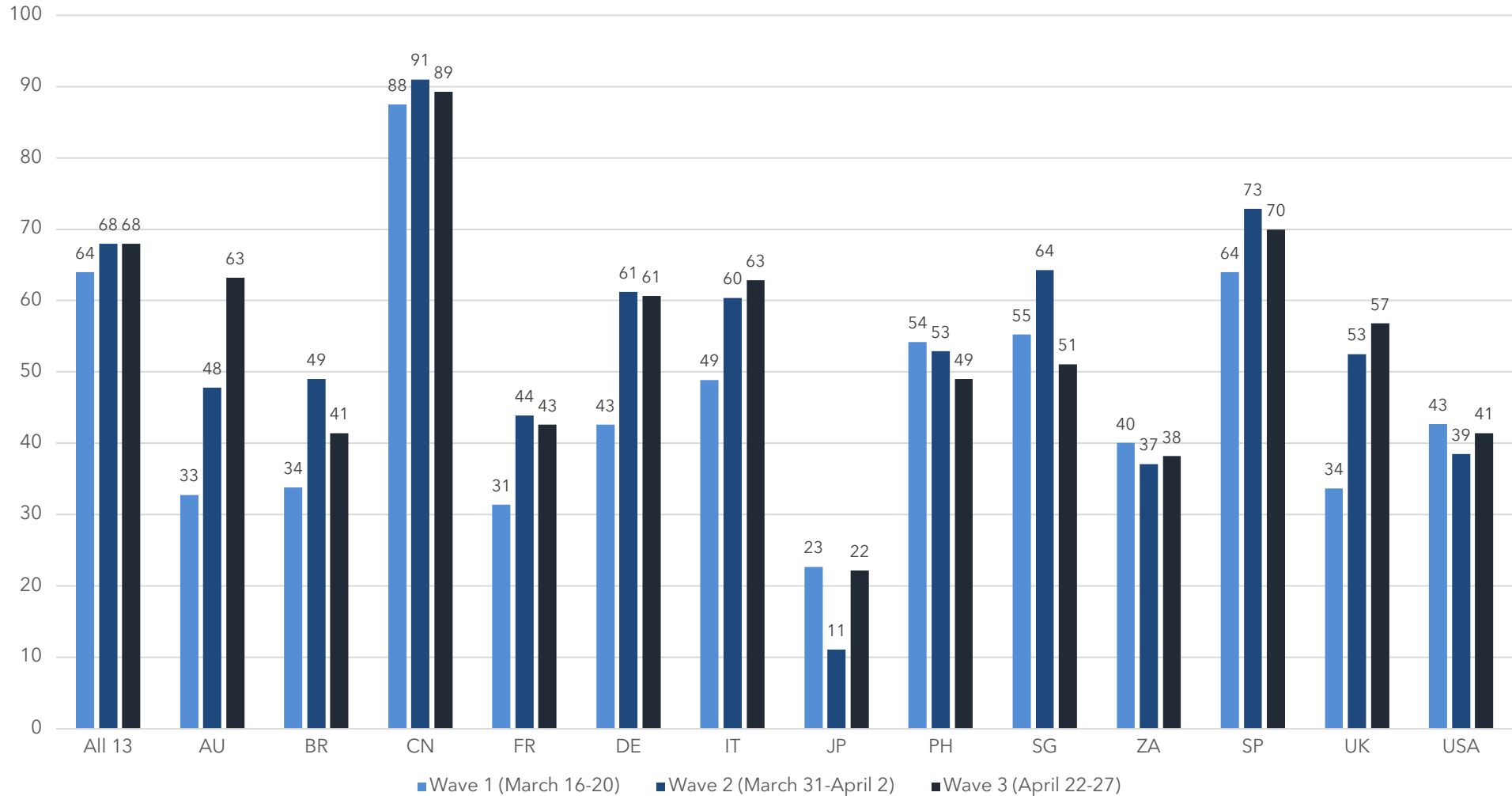
*Using all country data

Country's population	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly approve	30	30	25	20	27	29	29	28
Somewhat approve	38	38	42	42	38	40	40	38
Neither approve nor disapprove	14	14	16	20	16	14	14	17
Somewhat disapprove	12	12	12	14	13	11	12	12
Strongly disapprove	7	6	5	5	6	6	5	5

Question: How much do you approve / disapprove of how the following have handled the coronavirus / COVID-19 outbreak so far? Your country's population

Levels of Approval - Your Country's Population: Trended Data

% who say they strongly or somewhat approve of how their country's population have handled the coronavirus / COVID-19 outbreak



Question: How much do you approve / disapprove of how the following have handled the coronavirus / COVID-19 outbreak so far? Your country's population. Chart illustrates combined responses for Strongly Approve, Somewhat Approve

Levels of Approval - Social Media Companies

% who say they approve / disapprove of how social media companies have handled the coronavirus / COVID-19 outbreak

Social media companies	All	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	19	9	24	7	17	10	8	33	10	13	4	6	24	7	22	11	9	12
Somewhat approve	43	32	39	33	57	28	31	41	34	38	17	33	48	39	36	34	30	26
Neither approve nor disapprove	27	43	24	43	22	42	42	12	41	29	42	46	23	43	29	40	47	46
Somewhat disapprove	7	8	8	10	3	8	12	8	10	11	18	10	4	6	10	8	7	8
Strongly disapprove	5	9	5	6	1	11	8	6	6	9	19	5	2	4	4	7	7	9

% who say they approve / disapprove of how social media companies* have handled the coronavirus / COVID-19 outbreak

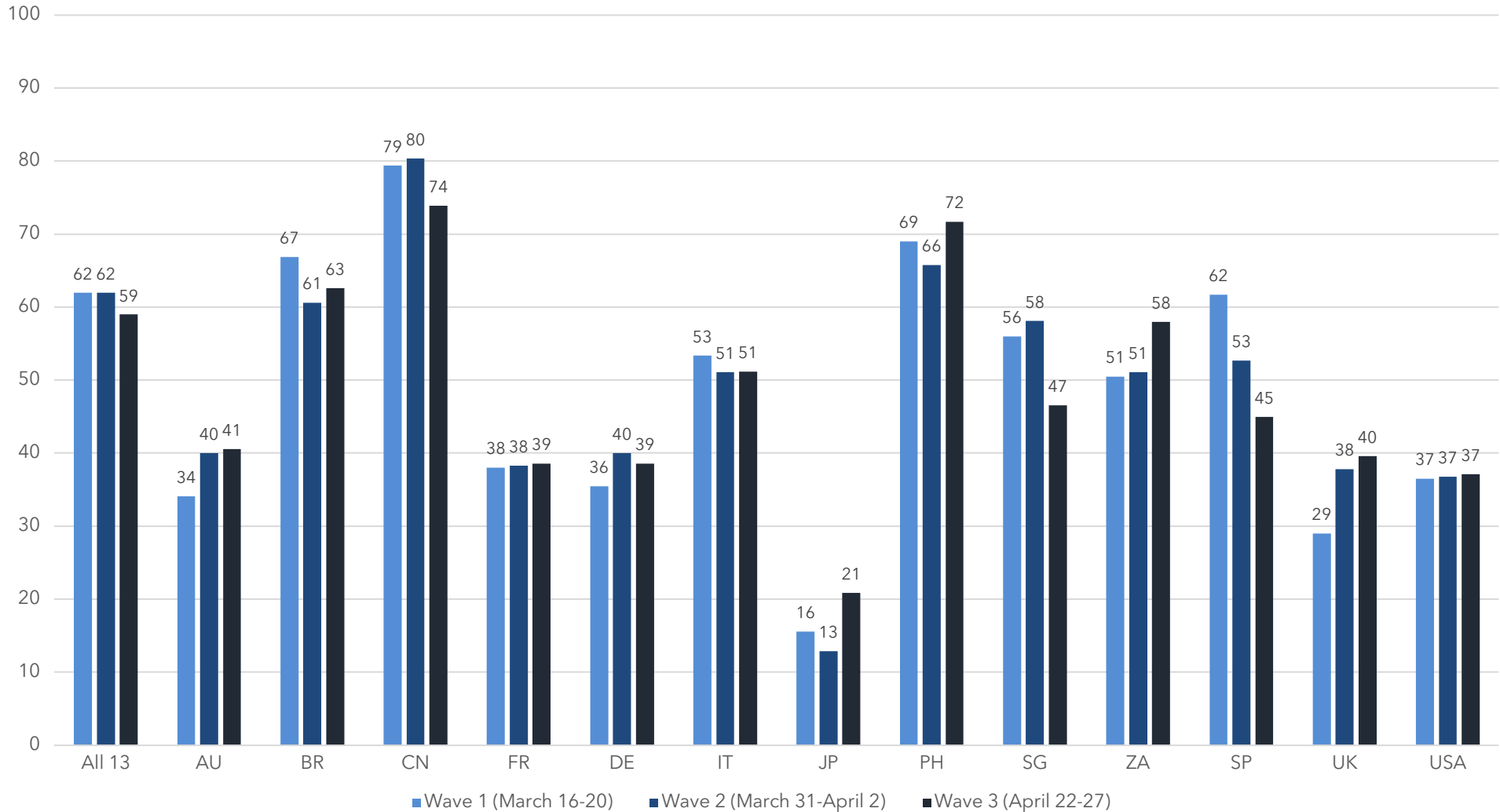
*Using all country data

Social media companies	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly approve	24	20	13	11	18	19	19	21
Somewhat approve	45	45	41	33	43	44	43	42
Neither approve nor disapprove	21	24	33	40	30	25	26	27
Somewhat disapprove	6	7	7	9	6	7	7	6
Strongly disapprove	4	4	6	8	4	6	5	4

Question: How much do you approve / disapprove of how the following have handled the coronavirus / COVID-19 outbreak so far? Social media companies

Levels of Approval - Social Media Companies: Trended Data

% who say they strongly or somewhat approve of how social media companies have handled the coronavirus / COVID-19 outbreak



Question: How much do you approve / disapprove of how the following have handled the coronavirus / COVID-19 outbreak so far? Social media companies. Chart illustrates combined responses for Strongly Approve, Somewhat Approve

Levels of Approval - Banks / Financial Institutions

% who say they approve / disapprove of how banks / financial institutions have handled the coronavirus / COVID-19 outbreak

Banks/financial institutions	All	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	23	15	25	17	19	9	10	46	13	9	5	21	33	13	30	9	12	17
Somewhat approve	41	41	37	38	52	26	29	36	42	30	21	39	45	45	38	30	38	31
Neither approve nor disapprove	26	32	18	29	25	40	44	9	28	32	62	34	17	35	19	33	31	39
Somewhat disapprove	6	7	11	10	3	14	9	7	9	13	6	5	4	4	8	17	12	7
Strongly disapprove	4	5	9	6	1	12	9	3	8	16	7	2	1	2	6	11	7	6

% who say they approve / disapprove of how banks / financial institutions* have handled the coronavirus / COVID-19 outbreak

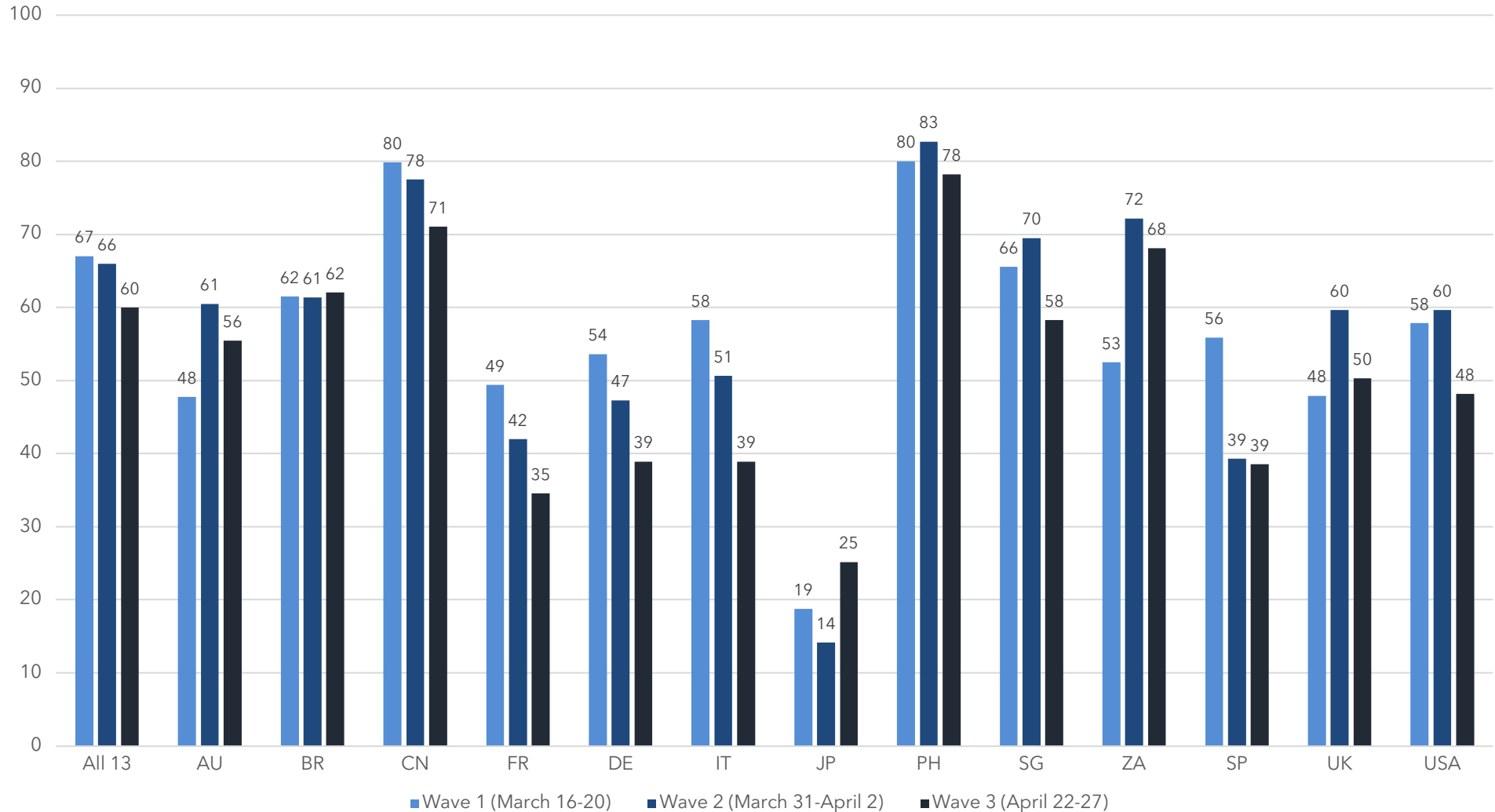
*Using all country data

Banks/financial institutions	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly approve	27	26	17	16	24	23	26	27
Somewhat approve	42	40	42	39	40	42	40	38
Neither approve nor disapprove	22	24	30	33	28	24	23	24
Somewhat disapprove	6	6	6	7	5	7	6	7
Strongly disapprove	3	4	5	5	4	5	4	4

Question: How much do you approve / disapprove of how the following have handled the coronavirus / COVID-19 outbreak so far? Banks/financial institutions

Levels of Approval - Banks / Financial Institutions: Trended Data

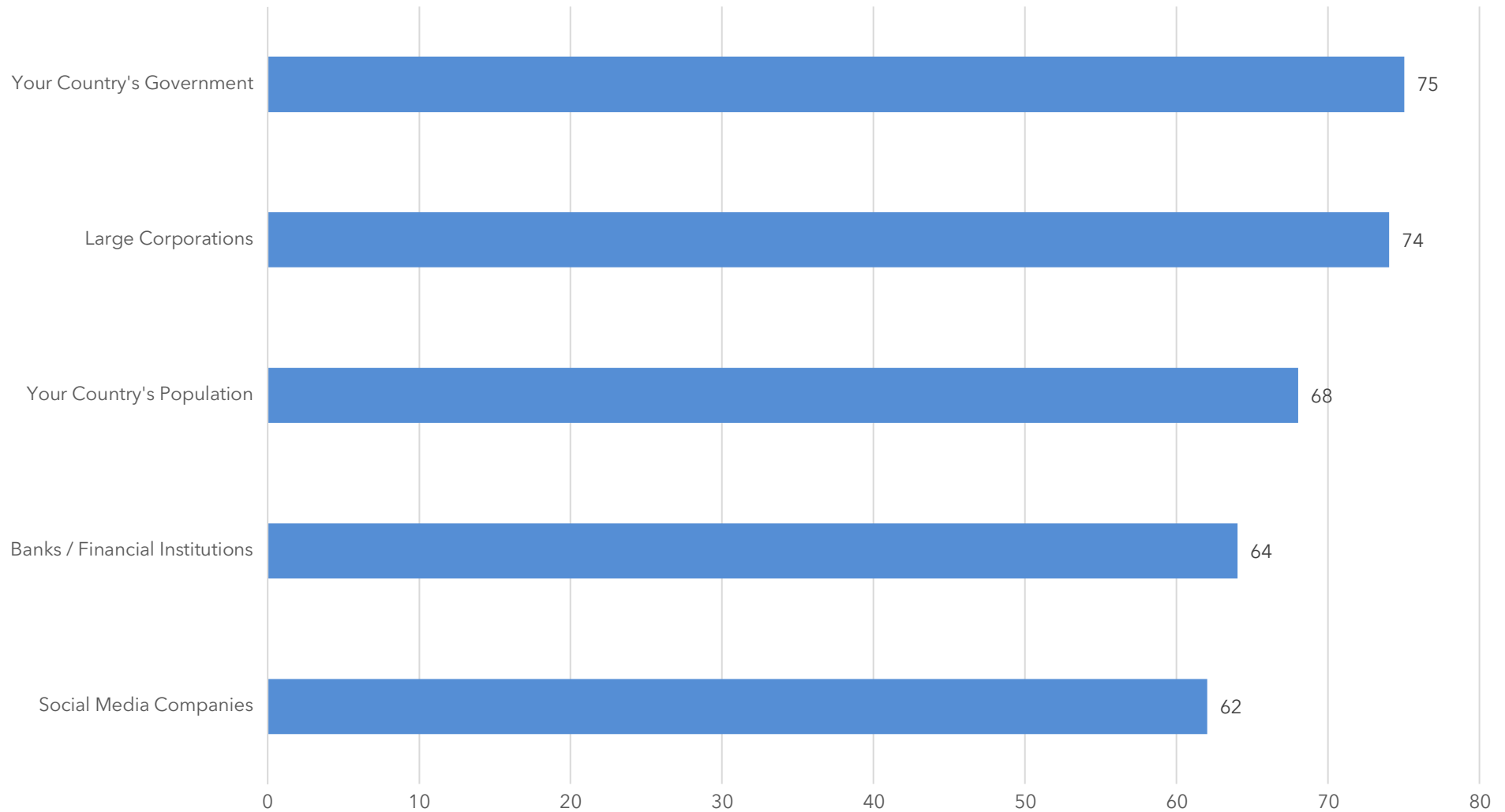
% who say they strongly or somewhat approve of how banks / financial institutions have handled the coronavirus / COVID-19 outbreak



Question: How much do you approve / disapprove of how the following have handled the coronavirus / COVID-19 outbreak so far? Banks/financial institutions. Chart illustrates combined responses for Strongly Approve, Somewhat Approve

Levels of Approval - Ranking

% across the 17 markets in wave 3 who say they strongly or somewhat approve of how the following have handled the coronavirus / COVID-19 outbreak



Question: How much do you approve / disapprove of how the following have handled the coronavirus / COVID-19 outbreak so far? Chart illustrates combined responses for Strongly Approve, Somewhat Approve

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	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	18	16	34	17	9	24	22	28	20	28	7	16	16	6	21	28	14	24
Somewhat approve	34	36	30	33	35	27	31	41	28	35	28	29	36	38	28	32	35	25
Neither approve nor disapprove	34	37	24	37	41	36	30	16	39	25	46	40	32	41	30	31	37	38
Somewhat disapprove	10	8	8	10	11	7	10	10	9	8	10	11	12	11	10	3	10	8
Strongly disapprove	5	4	4	4	4	6	6	6	4	5	8	4	4	4	12	6	4	6

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

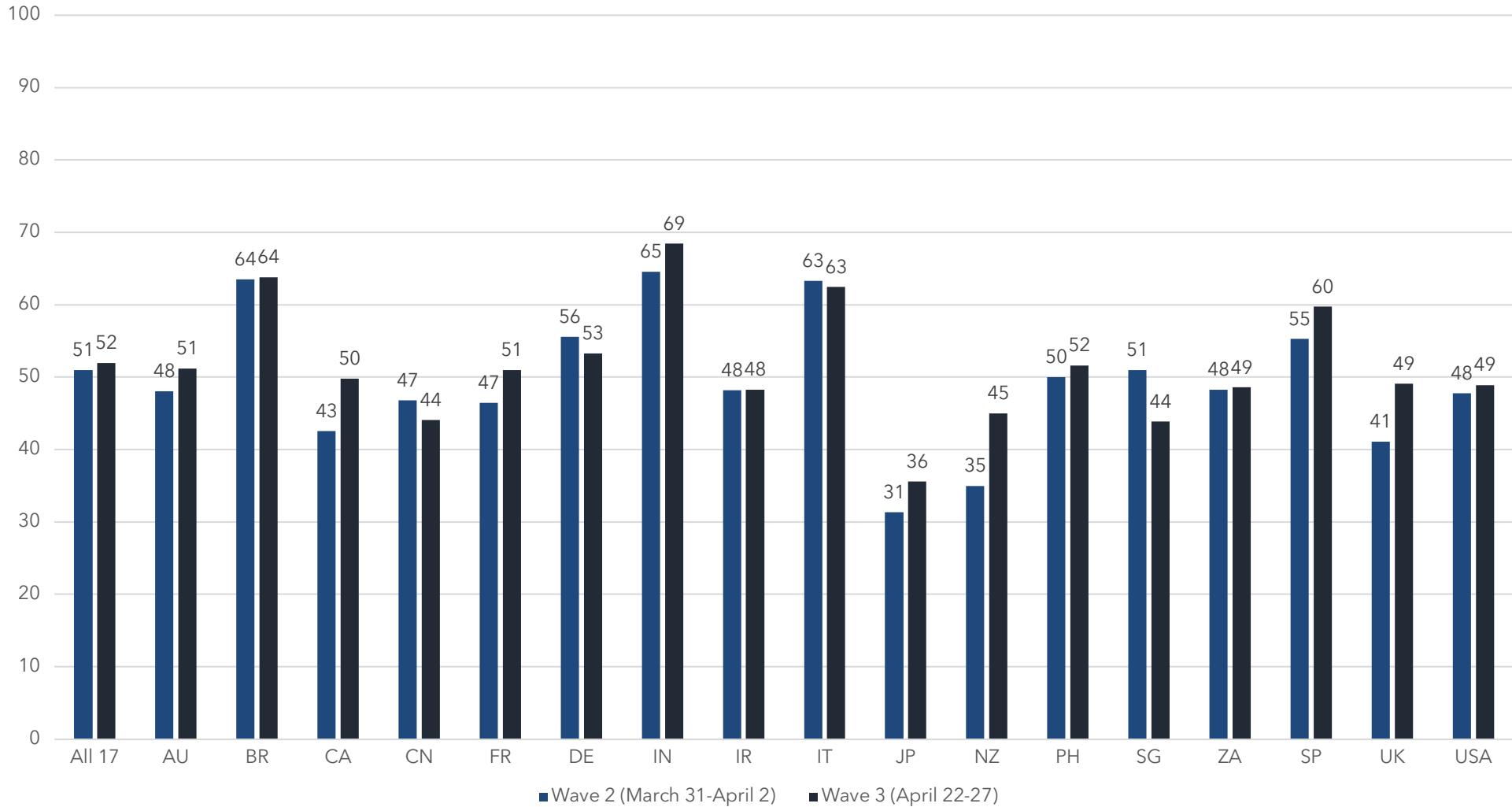
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly approve	18	21	15	14	16	19	19	21
Somewhat approve	34	35	33	27	34	34	33	32
Neither approve nor disapprove	33	31	37	40	35	33	33	34
Somewhat disapprove	12	9	9	12	10	10	9	10
Strongly disapprove	4	5	5	7	5	5	5	4

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

Running "Normal" Advertising Campaigns - Trended Data

% who strongly or somewhat approve 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.

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	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	36	25	57	33	33	23	19	47	29	40	21	28	47	19	48	30	27	28
Somewhat approve	43	46	29	38	53	36	37	36	38	34	36	39	39	51	34	40	42	36
Neither approve nor disapprove	15	22	10	22	11	29	25	9	24	17	33	27	11	25	12	21	24	27
Somewhat disapprove	4	4	2	4	1	5	10	6	7	5	5	5	3	3	5	4	5	5
Strongly disapprove	3	3	1	4	1	7	9	3	2	4	6	2	0	2	2	6	3	4

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

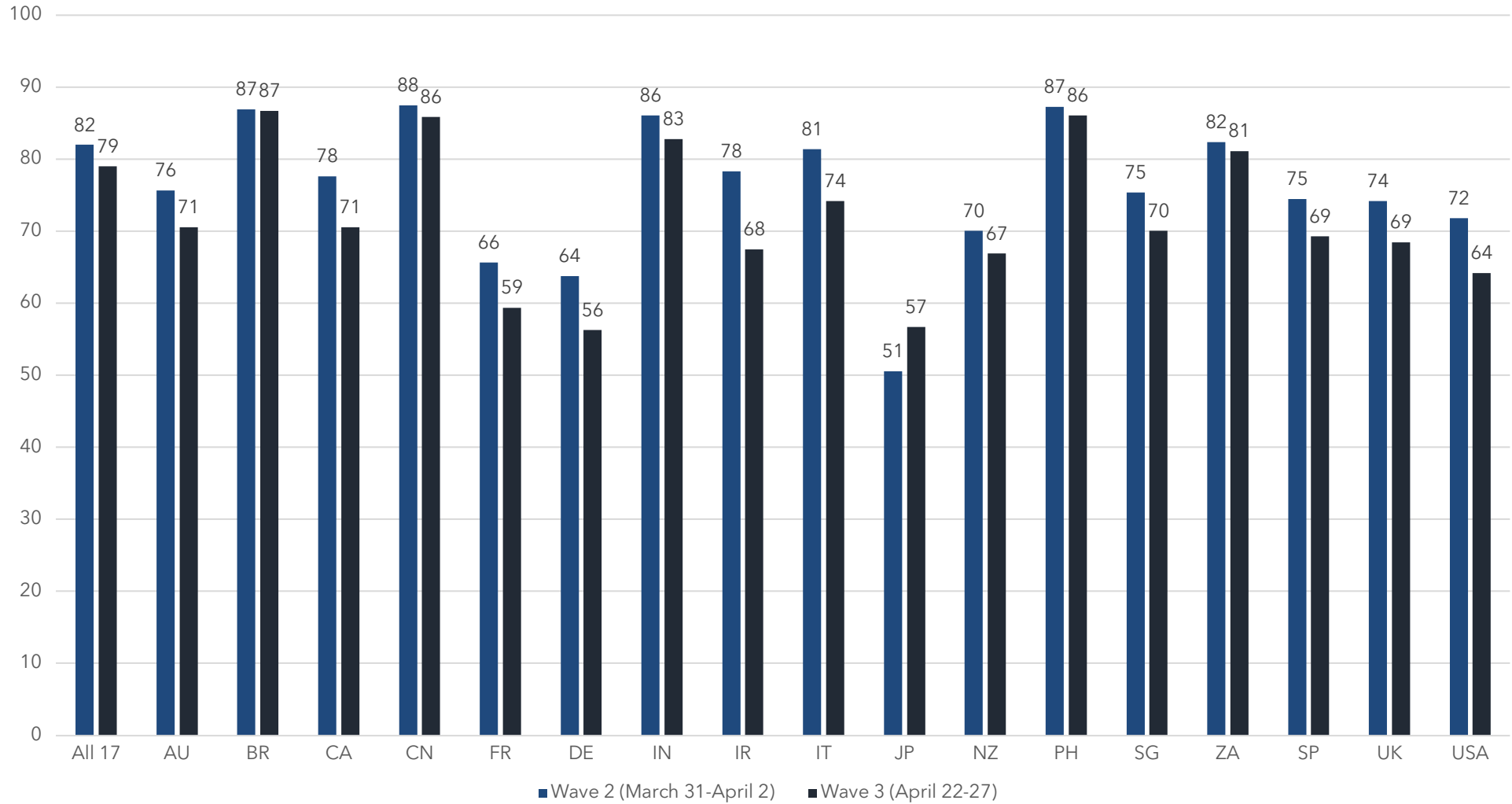
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly approve	38	38	32	32	37	35	40	34
Somewhat approve	44	42	45	37	43	43	42	41
Neither approve nor disapprove	11	15	17	24	15	16	13	18
Somewhat disapprove	4	4	3	3	3	4	3	4
Strongly disapprove	3	2	3	4	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? 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 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.

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	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	30	27	51	30	23	30	22	39	34	40	22	33	38	19	37	41	26	34
Somewhat approve	45	43	32	40	55	34	37	41	36	35	41	41	44	50	38	33	38	32
Neither approve nor disapprove	19	25	14	23	18	28	24	12	24	20	29	22	14	24	16	19	28	27
Somewhat disapprove	3	3	1	5	3	4	9	5	5	4	4	3	3	4	5	4	4	2
Strongly disapprove	3	2	2	3	2	4	8	4	1	2	5	2	1	4	4	3	4	5

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

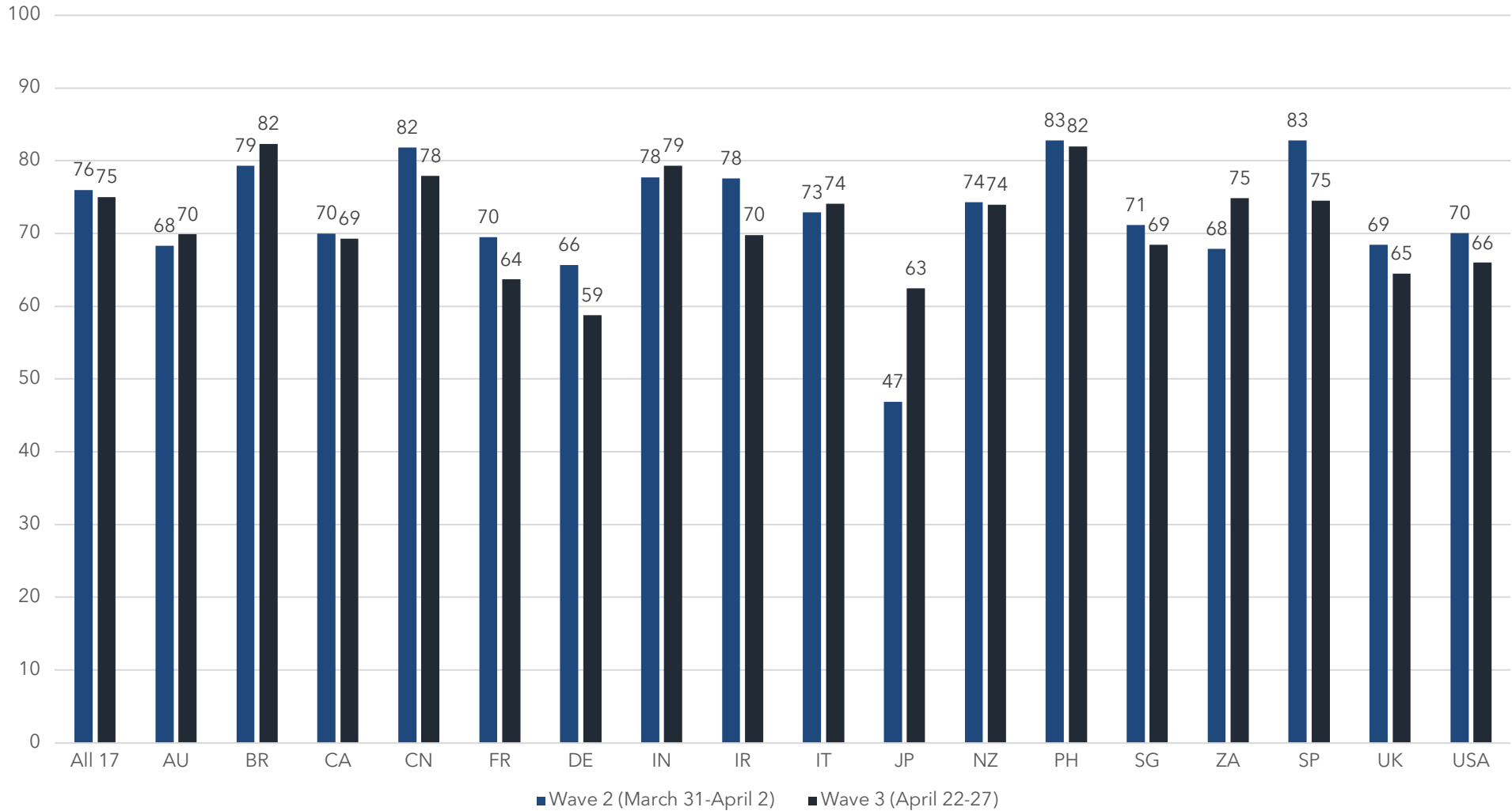
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly approve	33	33	28	22	32	29	32	32
Somewhat approve	49	43	44	42	45	44	44	41
Neither approve nor disapprove	12	17	23	30	19	19	18	19
Somewhat disapprove	3	4	3	4	3	4	4	4
Strongly disapprove	3	3	3	4	2	4	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 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.

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	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	50	33	71	40	51	36	32	57	47	51	38	39	64	33	60	47	39	39
Somewhat approve	35	44	20	38	41	36	40	29	33	30	35	38	27	49	29	34	40	34
Neither approve nor disapprove	11	17	7	18	7	19	16	7	14	13	19	19	7	15	9	14	18	22
Somewhat disapprove	3	4	2	3	1	4	8	5	4	3	3	4	1	2	1	3	2	3
Strongly disapprove	2	3	1	2	1	5	5	3	2	2	4	0	1	1	1	3	2	3

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

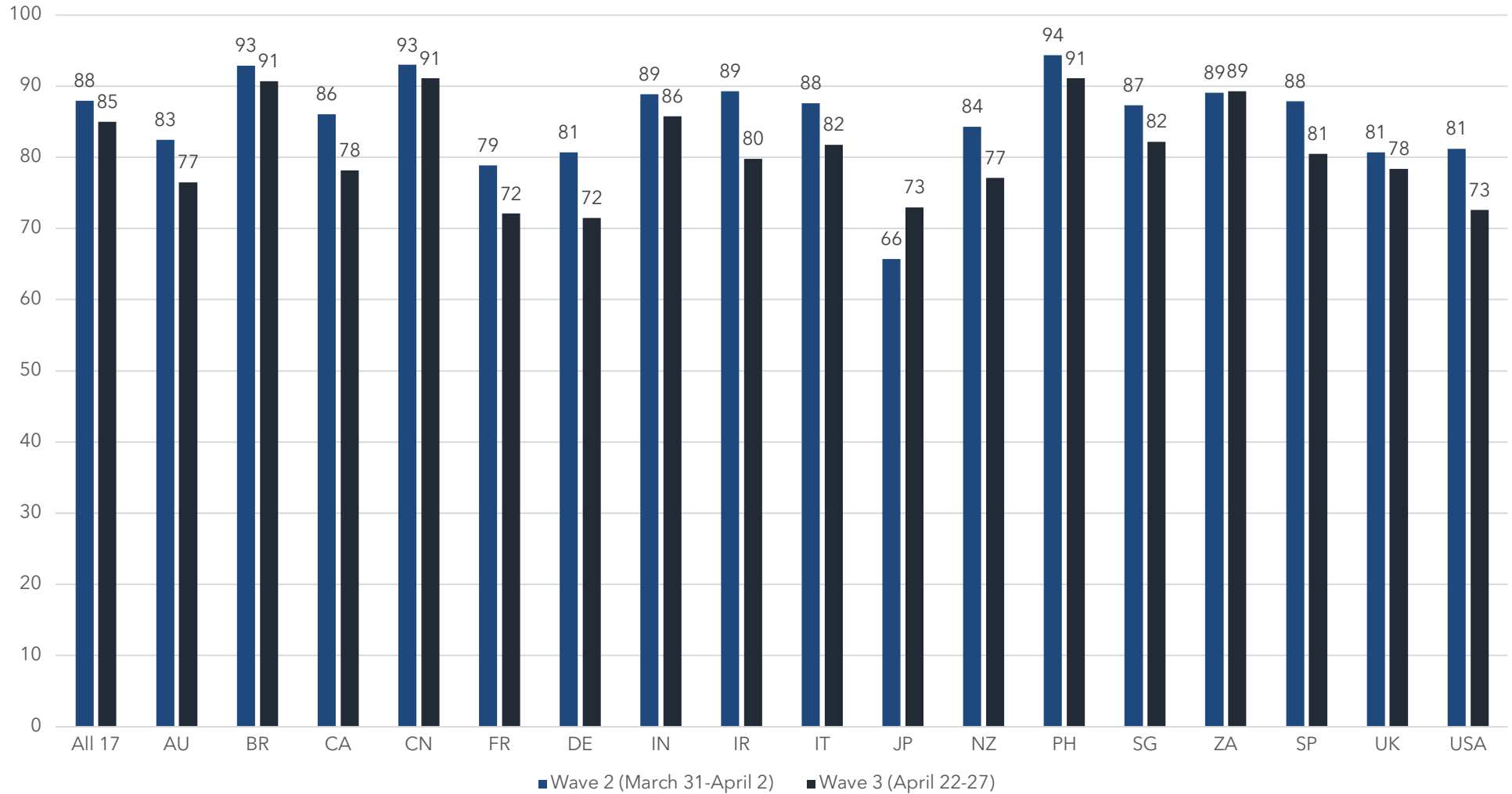
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly approve	52	51	48	46	53	47	54	46
Somewhat approve	36	34	36	36	33	37	33	37
Neither approve nor disapprove	7	10	13	15	10	11	9	12
Somewhat disapprove	4	3	2	1	2	3	2	2
Strongly disapprove	2	2	2	2	1	2	2	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? Providing practical information / tips which help people to deal with the situation

Providing Practical Info / Tips - Trended Data

% who strongly or somewhat approve 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.

Levels of Approval for Brand Activities: Selling Non-Essential Items Online

% who approve / disapprove of brands continuing to sell non-essential products via their websites

	All	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	26	31	41	38	13	25	24	33	33	45	10	25	19	19	30	34	31	50
Somewhat approve	36	36	27	36	45	30	28	30	37	32	24	27	36	44	32	35	35	27
Neither approve nor disapprove	27	28	26	22	33	27	33	15	23	17	47	25	28	31	20	23	26	21
Somewhat disapprove	8	4	5	3	8	10	8	12	6	4	8	14	12	5	11	3	5	2
Strongly disapprove	4	1	2	1	2	8	7	10	1	3	12	10	5	2	8	5	3	1

% who approve / disapprove of brands continuing to sell non-essential products via their websites*

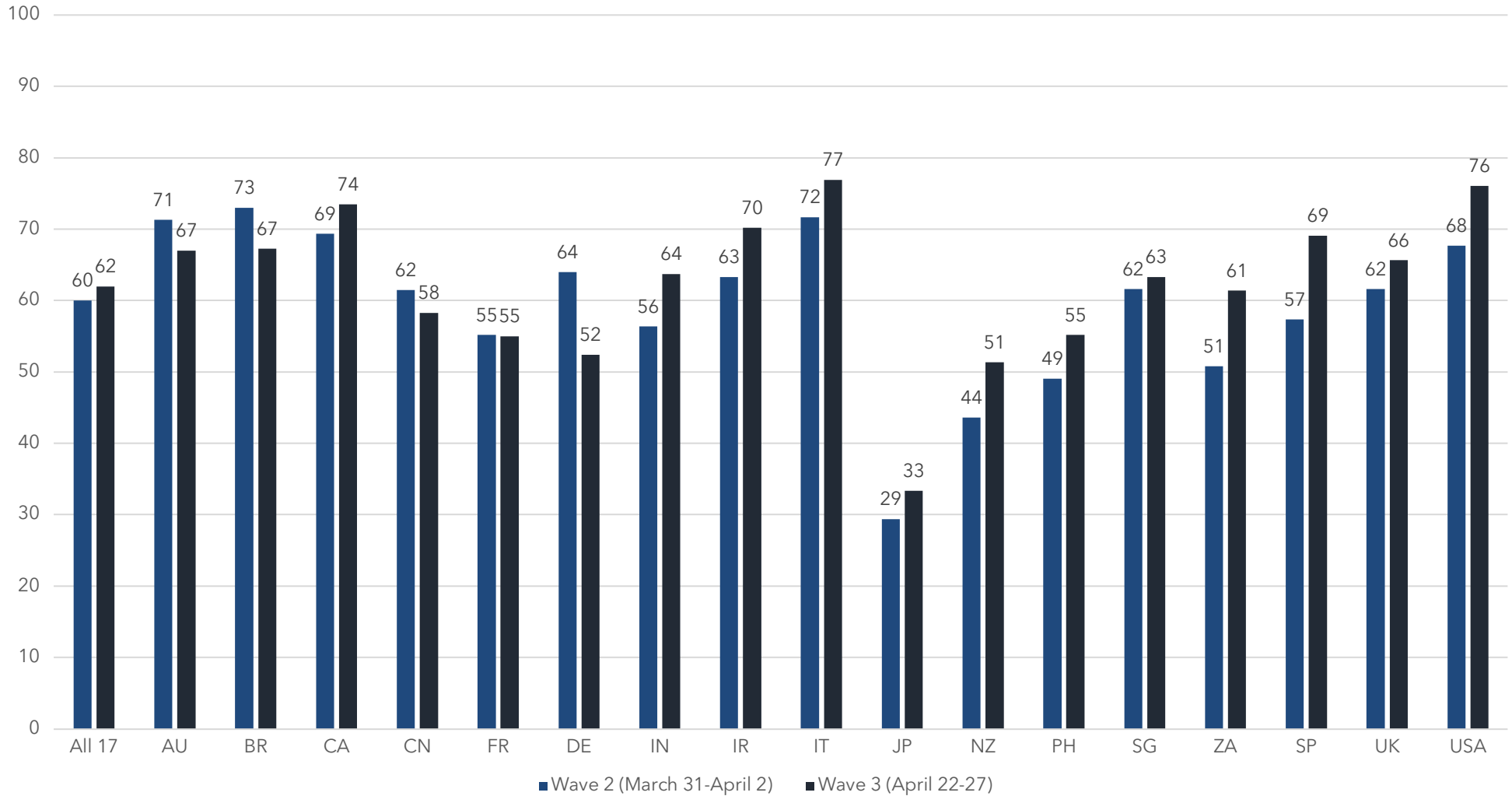
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly approve	26	27	23	27	27	25	28	25
Somewhat approve	34	38	36	29	34	37	38	37
Neither approve nor disapprove	26	24	31	31	28	26	25	26
Somewhat disapprove	10	7	7	8	7	8	6	9
Strongly disapprove	4	4	4	6	4	4	4	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? Continuing to sell non-essential products via their websites

Selling Non-Essential Items Online - Trended Data

% who strongly or somewhat approve of brands continuing to sell non-essential products via their websites



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? Continuing to sell non-essential products via their websites. Chart illustrates combined responses for Strongly Approve, Somewhat Approve.

Levels of Approval for Brand Activities: Running Promotions for Customers

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

	All	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	44	40	70	49	40	46	33	41	46	59	19	40	40	32	50	50	37	54
Somewhat approve	38	37	17	31	48	30	38	36	33	26	34	33	43	49	31	28	34	26
Neither approve nor disapprove	13	18	9	17	9	15	20	12	14	11	39	21	13	15	12	16	23	17
Somewhat disapprove	3	4	2	2	2	6	5	8	5	2	4	4	3	3	3	3	4	1
Strongly disapprove	2	1	2	2	1	4	5	4	2	2	5	2	1	2	2	3	3	2

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

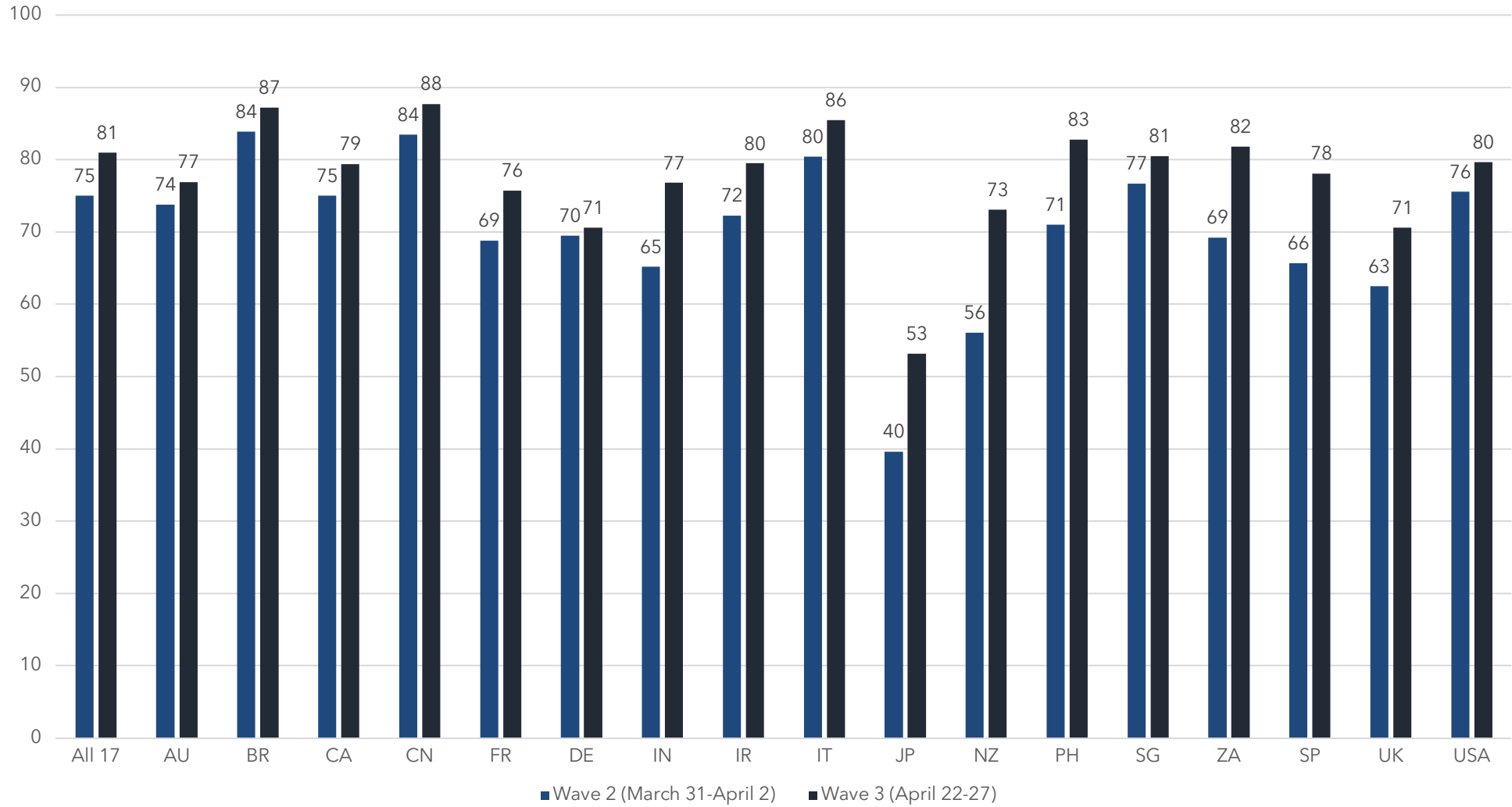
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly approve	39	46	44	44	47	41	48	42
Somewhat approve	40	37	37	36	36	40	35	36
Neither approve nor disapprove	13	12	15	17	13	14	12	16
Somewhat disapprove	5	4	2	1	3	4	3	3
Strongly disapprove	3	2	1	2	1	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? Running promotions / offers / loyalty perks for customers

Running Promotions for Customers - Trended Data

% who strongly or somewhat approve 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.

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	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	37	27	45	31	39	22	18	44	27	32	19	30	38	17	42	32	33	32
Somewhat approve	39	39	30	31	46	32	34	36	43	33	36	35	44	46	31	37	40	28
Neither approve nor disapprove	18	23	17	26	13	31	24	11	20	23	36	25	13	28	18	24	22	30
Somewhat disapprove	4	6	4	7	2	7	14	7	6	6	5	6	3	6	5	4	3	6
Strongly disapprove	3	6	3	6	0	8	11	3	3	6	4	4	2	2	4	4	3	4

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

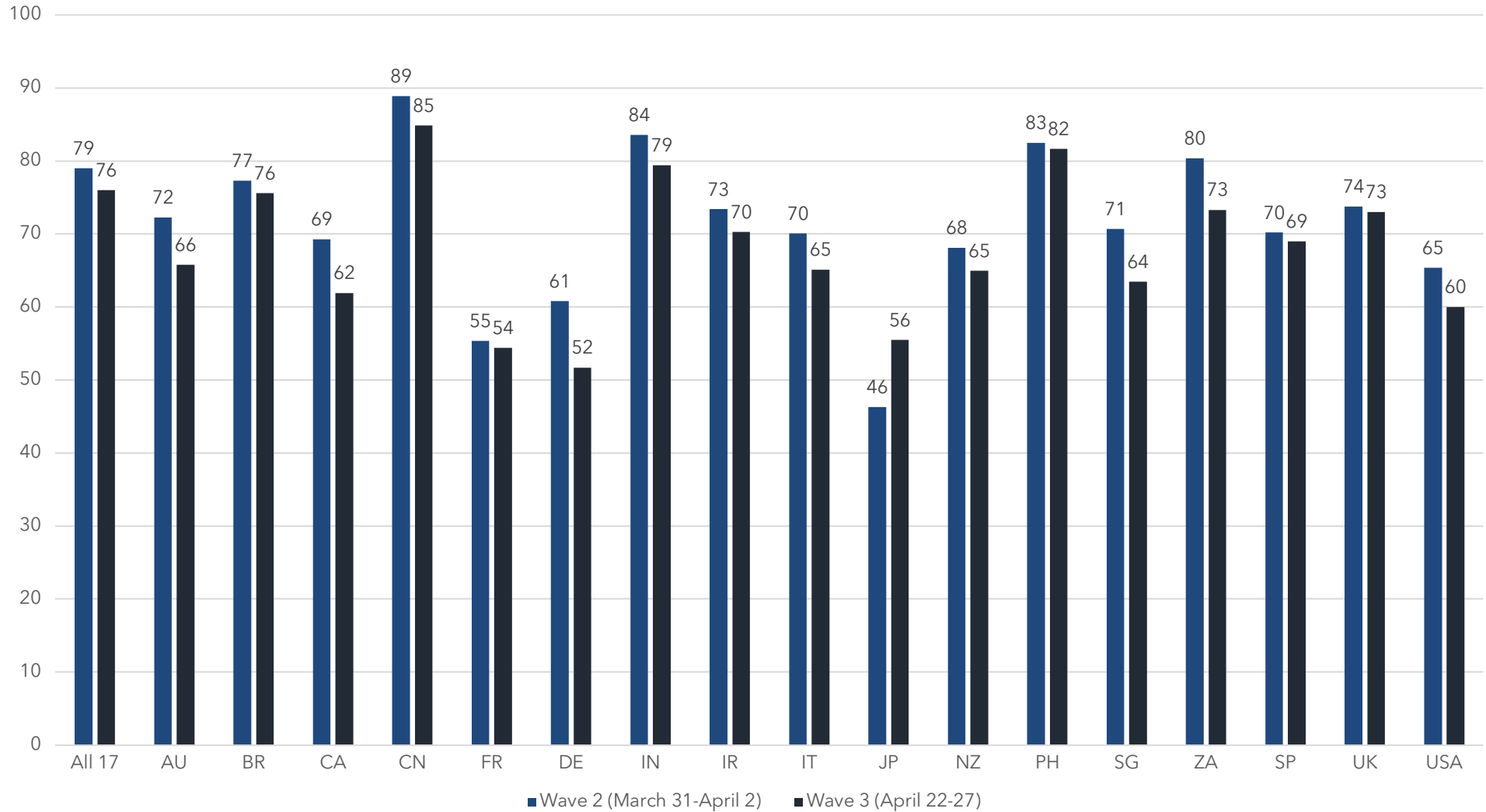
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly approve	38	39	33	32	37	36	42	32
Somewhat approve	40	38	40	34	39	39	36	42
Neither approve nor disapprove	14	17	20	24	18	17	15	19
Somewhat disapprove	5	4	4	6	4	5	4	5
Strongly disapprove	3	2	3	5	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? 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 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.

Levels of Approval for Brand Activities: Producing Essential Supplies

% who approve / disapprove of brands suspending their normal factory production to help produce essential supplies

	All	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	39	39	50	50	34	42	31	44	48	40	25	42	41	29	46	48	42	47
Somewhat approve	37	34	28	28	44	31	39	32	32	36	38	34	38	42	32	30	33	28
Neither approve nor disapprove	17	20	16	17	16	18	20	13	15	16	28	20	13	24	13	16	19	20
Somewhat disapprove	5	4	3	4	5	5	6	7	5	6	5	3	5	4	6	3	4	3
Strongly disapprove	2	3	3	2	1	4	4	4	0	2	4	3	3	1	3	3	2	2

% who approve / disapprove of brands suspending their normal factory production to help produce essential supplies*

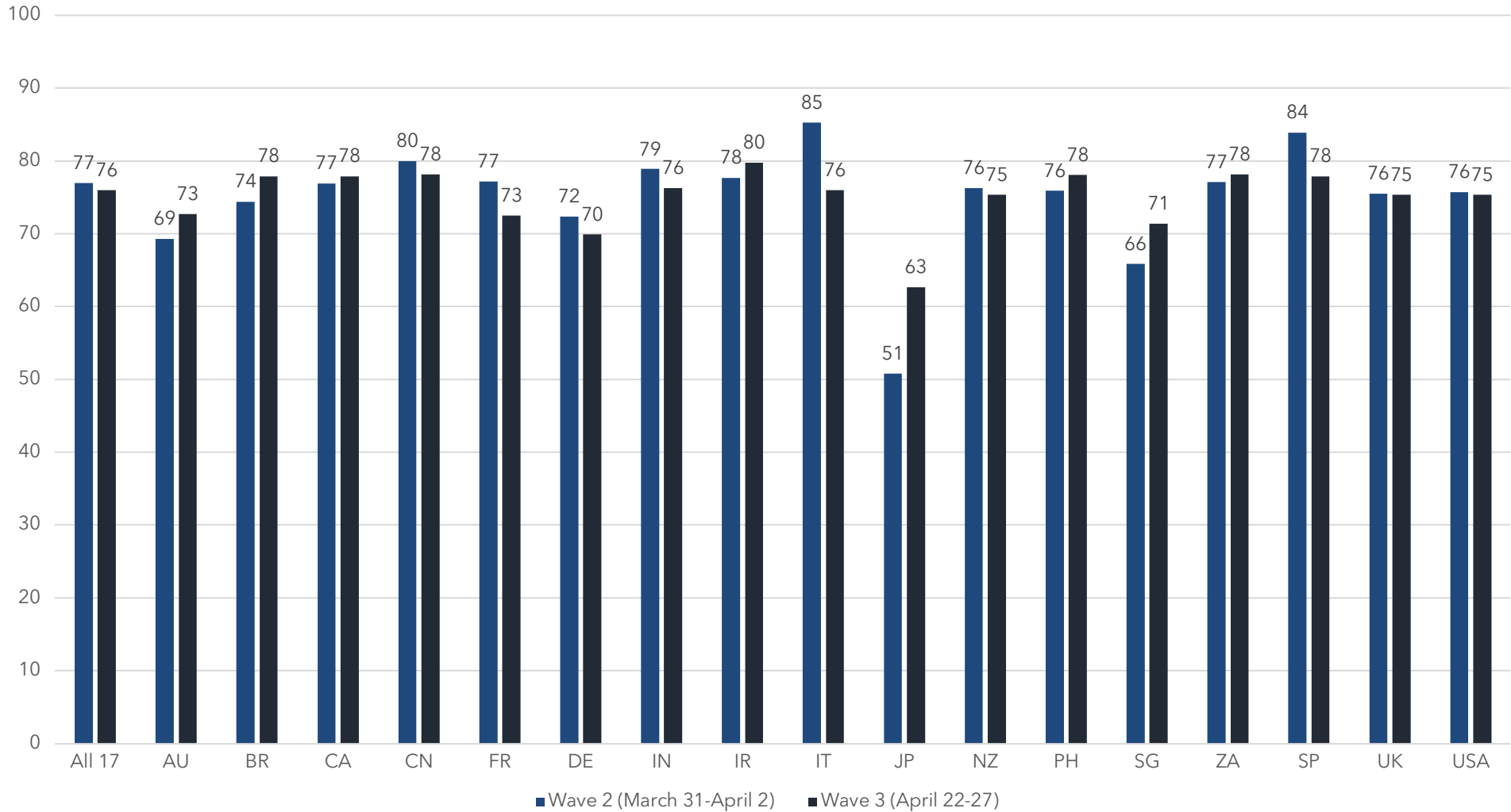
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly approve	40	38	40	45	43	37	42	36
Somewhat approve	34	38	38	33	35	38	37	35
Neither approve nor disapprove	16	17	17	17	16	17	14	21
Somewhat disapprove	7	5	3	3	4	6	4	6
Strongly disapprove	2	2	2	1	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? Suspending their normal factory production to help produce essential supplies

Producing Essential Supplies - Trended Data

% who strongly or somewhat approve of brands suspending their normal factory production to help produce essential supplies



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? Suspending their normal factory production to help produce essential supplies. Chart illustrates combined responses for Strongly Approve, Somewhat Approve.

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	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	43	39	76	49	32	37	27	52	46	56	23	40	59	34	64	55	36	49
Somewhat approve	37	34	16	30	51	32	33	33	32	27	31	32	29	44	23	26	34	25
Neither approve nor disapprove	15	22	6	17	16	23	24	7	18	13	39	22	9	19	9	13	23	20
Somewhat disapprove	3	4	1	2	2	3	7	5	3	3	4	4	3	3	3	3	3	4
Strongly disapprove	2	2	0	2	0	6	9	3	2	2	4	2	0	1	1	2	3	3

% 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	46	44	40	37	44	42	47	39
Somewhat approve	37	37	38	34	37	38	36	38
Neither approve nor disapprove	11	14	18	24	15	15	13	17
Somewhat disapprove	3	4	2	2	2	4	3	4
Strongly disapprove	2	2	2	2	2	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? Offering flexible payment terms (e.g. instalments, payment plans, etc.)

Levels of Approval for Brand Activities: Lower Cost Versions of Products

% who approve / disapprove of brands producing lower-cost versions of their normal products

	All	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	35	34	67	41	19	44	28	51	45	50	28	42	59	34	55	47	33	39
Somewhat approve	36	38	20	32	43	30	34	33	33	30	34	32	30	43	24	29	36	30
Neither approve nor disapprove	20	23	10	21	26	19	25	9	18	14	30	23	8	18	14	18	25	24
Somewhat disapprove	6	4	1	4	8	3	8	5	4	4	3	3	2	3	5	4	5	5
Strongly disapprove	3	2	2	3	4	4	6	2	1	2	4	1	0	1	3	3	2	2

% who approve / disapprove of brands producing lower-cost versions of their normal products*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly approve	39	36	32	32	37	34	36	36
Somewhat approve	33	37	36	31	36	36	36	36
Neither approve nor disapprove	19	18	23	29	20	21	19	18
Somewhat disapprove	7	5	5	5	5	6	6	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? Producing lower-cost versions of their normal products

Levels of Approval for Brand Activities: Pledging Money / Aid / Supplies

% who approve / disapprove of brands pledging money / aid / supplies to help people

	All	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	50	39	56	49	53	30	30	50	52	59	35	38	53	38	60	39	43	51
Somewhat approve	34	36	24	26	39	29	40	33	31	23	33	35	34	41	27	32	33	27
Neither approve nor disapprove	12	20	13	20	7	30	20	10	15	13	24	22	10	18	10	21	19	20
Somewhat disapprove	3	3	5	3	1	5	4	5	2	3	3	3	3	2	1	4	2	1
Strongly disapprove	2	2	3	2	1	7	5	2	0	2	5	3	0	2	2	3	3	2

% who approve / disapprove of brands pledging money / aid / supplies to help people*

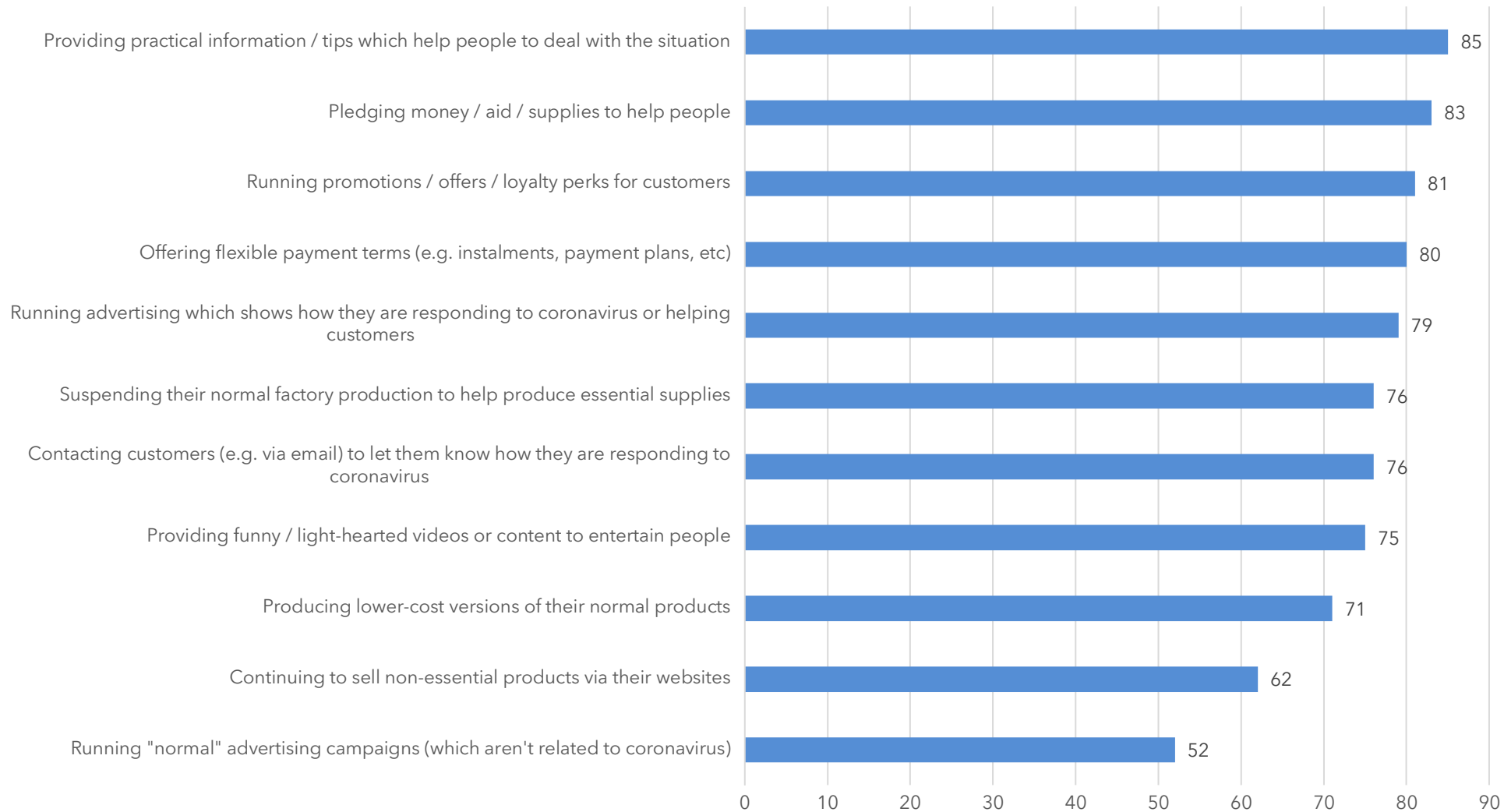
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Strongly approve	49	50	50	49	52	48	56	43
Somewhat approve	35	34	33	32	32	35	31	35
Neither approve nor disapprove	10	11	14	16	12	12	10	15
Somewhat disapprove	4	3	1	2	2	3	2	4
Strongly disapprove	2	2	2	2	2	2	2	3

Question: Many brands and companies are trying to decide how best to respond to the coronavirus / COVID-19 outbreak. To what extent do you approve / disapprove of them doing the following at the moment? Pledging money / aid / supplies to help people

Levels of Approval for Brand Activities - Ranked Activities

% who strongly or somewhat approve 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.

Awareness of Brand Responses

% who say they are aware of the following brands doing something to support people during the crisis (e.g. donating masks, money, etc)

	All	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Amazon	34	15	24	29	26	19	19	65	23	35	31	10	29	18	22	31	29	35
Apple	26	13	19	19	33	11	12	26	13	12	19	10	26	20	22	15	14	25
Dell	14	4	8	6	22	4	5	15	5	3	5	1	11	4	6	3	3	7
Facebook	24	15	34	18	13	17	13	52	19	18	10	13	62	24	36	15	15	20
Google	35	19	41	28	26	21	19	66	20	21	27	14	60	28	42	23	16	31
Microsoft	35	15	25	22	45	13	19	42	17	18	15	11	33	21	32	18	15	22
Netflix	15	12	29	14	7	14	9	29	14	16	13	9	31	15	21	19	10	16
Samsung	20	8	23	9	23	10	8	28	7	11	3	4	30	10	19	13	6	8
Sony	14	4	9	8	19	5	5	17	5	6	13	3	15	5	5	6	5	8
Tesla	17	7	9	17	24	7	10	15	11	7	2	5	14	9	12	10	7	19
Twitter	13	5	12	8	11	7	5	23	7	5	19	2	25	6	14	7	7	8
None of these	28	62	37	45	23	54	56	9	46	43	49	65	16	45	31	45	49	38

Question: To your knowledge, which of the following are doing something to support people during this crisis (e.g. donating masks, money, etc)?

Awareness of Brand Responses

% who say they are aware of the following brands doing something to support people during the crisis (e.g. donating masks, money, etc)*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Amazon	40	35	30	29	31	37	38	34
Apple	29	27	23	26	25	28	34	23
Dell	12	16	14	10	14	15	19	14
Facebook	30	26	20	17	22	26	28	25
Google	45	36	28	27	31	39	41	35
Microsoft	33	35	35	33	31	38	42	26
Netflix	18	18	12	12	14	17	19	13
Samsung	21	21	18	13	18	21	22	18
Sony	13	16	13	11	15	13	20	11
Tesla	17	18	17	16	14	20	23	10
Twitter	14	15	11	8	12	14	17	10
None of these	16	26	37	43	32	25	24	29

Question: To your knowledge, which of the following are doing something to support people during this crisis (e.g. donating masks, money, etc)?

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	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Creating / uploading videos (e.g. on YouTube, TikTok, etc)	14	8	23	7	12	7	4	30	8	8	4	9	22	8	13	12	4	6
Listening to more podcasts	14	12	21	12	12	10	11	24	19	7	4	10	14	8	18	11	12	13
Listening to more radio	19	17	21	26	16	20	28	25	25	24	11	18	23	22	35	28	25	13
Listening to more streaming services (e.g. Spotify, Apple Music, etc)	37	25	42	23	46	17	12	44	21	23	14	26	42	22	25	25	21	23
Reading more books / listening to more audiobooks	33	23	38	30	35	24	26	40	31	36	19	24	27	20	35	39	29	26
Reading more magazines	17	8	13	9	16	15	13	31	8	17	9	3	10	8	18	11	9	11
Reading more newspapers	20	12	17	13	14	14	18	46	14	20	16	8	16	31	18	18	12	13
Spending longer on messaging services (e.g. WhatsApp, Facebook Messenger, etc)	45	27	56	33	50	34	31	57	43	51	6	37	51	46	57	54	37	19
Spending longer on social media (e.g. Facebook, Instagram, Twitter, etc)	44	39	55	39	42	36	22	57	40	44	25	43	64	45	51	45	32	33
Spending longer talking on the telephone to others	29	25	23	29	31	41	29	35	30	43	8	29	14	13	29	42	33	24
Spending more time cooking	44	36	35	41	49	45	29	43	41	51	24	47	44	40	53	44	39	44
Spending more time on apps	34	22	42	24	38	23	13	47	23	31	9	23	44	34	43	27	22	19
Spending more time on computer / video games	35	24	46	36	34	37	24	45	23	35	28	28	37	26	34	37	22	24
Spending more time on esports	11	5	11	4	11	5	4	18	5	6	4	3	14	7	8	13	5	4
Spending more time on hobbies / pastimes	35	30	35	35	39	29	24	36	35	36	39	29	41	24	38	19	28	26
Spending more time socializing as a family / household	48	27	39	31	62	30	35	47	36	39	27	39	51	35	45	43	24	31
Spending more time using online learning platforms for yourself	34	19	45	22	31	12	9	59	25	24	11	22	53	33	49	25	17	20
Spending more time using online learning platforms for your child(ren)	19	10	14	10	29	9	5	17	12	12	5	14	14	12	17	14	10	9
Watching more news coverage	60	47	54	56	68	47	51	60	47	60	59	64	65	64	62	48	48	43
Watching more shows / films on streaming services (e.g. Netflix)	52	45	59	52	53	39	31	58	51	50	20	48	59	46	55	54	44	51
Watching more TV on broadcast channels	43	38	42	39	39	56	37	55	34	49	52	40	51	40	48	32	42	36
Watching more videos (e.g. on YouTube)	52	36	61	45	56	27	27	67	38	38	38	43	70	53	57	42	32	29
None of these	3	8	2	3	1	6	12	1	3	2	6	5	0	2	0	3	6	6

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

In-Home and Media Consumption Changes

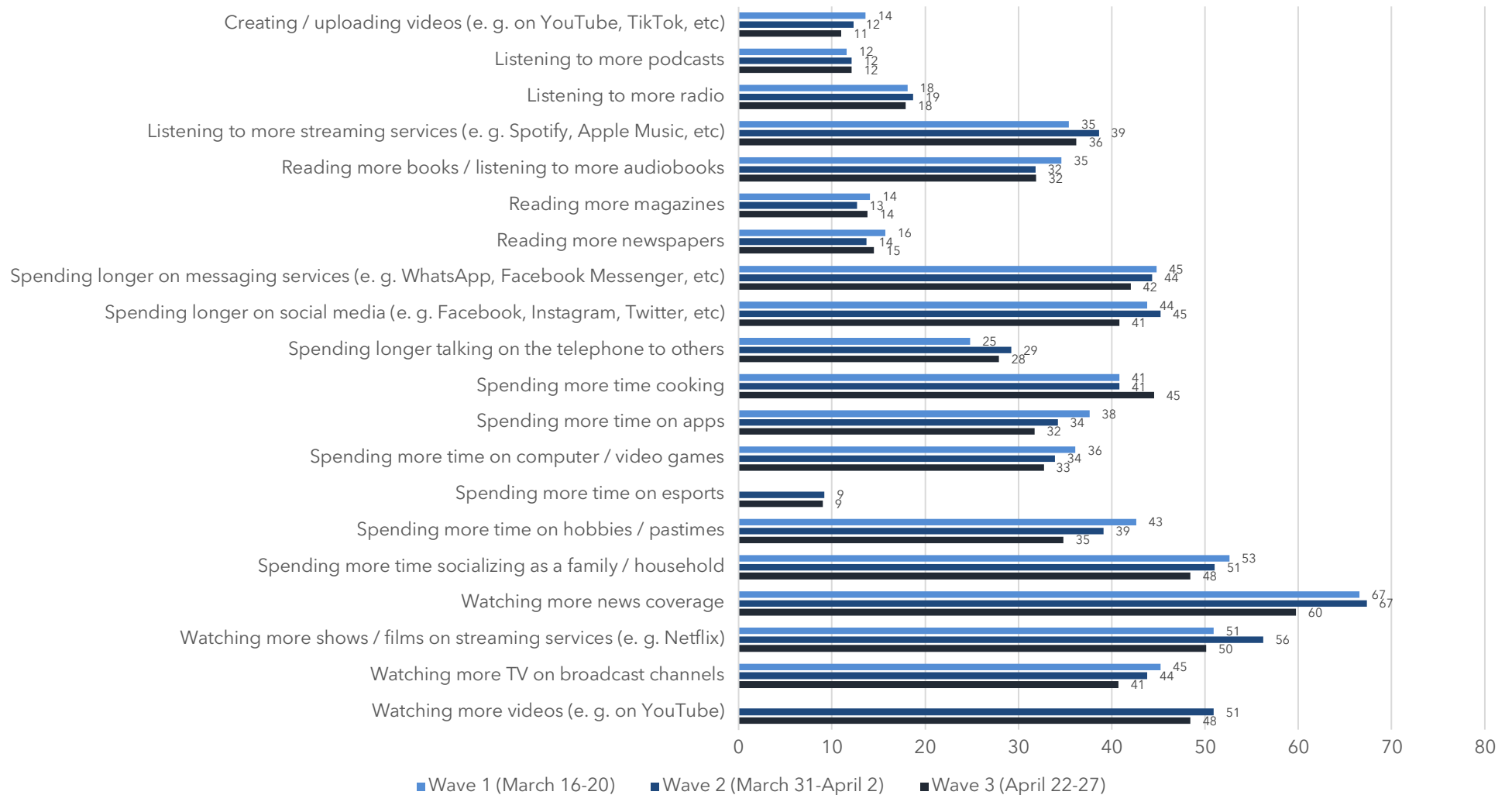
% who say they've been doing the following at home because of the coronavirus / COVID-19 outbreak (average across all markets)

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Creating / uploading videos (e.g. on YouTube, TikTok, etc)	22	17	8	3	13	16	17	15
Listening to more podcasts	19	17	9	6	14	15	17	12
Listening to more radio	18	18	22	21	18	20	21	18
Listening to more streaming services (e.g. Spotify, Apple Music, etc)	53	39	28	17	37	38	43	33
Reading more books / listening to more audiobooks	38	33	32	29	35	32	34	33
Reading more magazines	20	18	14	12	15	19	22	16
Reading more newspapers	24	21	18	16	17	23	24	21
Spending longer on messaging services (e.g. WhatsApp, Facebook Messenger, etc)	51	46	42	29	45	44	45	41
Spending longer on social media (e.g. Facebook, Instagram, Twitter, etc)	52	47	37	28	47	41	45	38
Spending longer talking on the telephone to others	30	29	29	31	29	29	33	25
Spending more time cooking	42	45	46	41	51	39	49	39
Spending more time on apps	43	37	27	16	34	35	38	31
Spending more time on computer / video games	44	37	28	21	29	40	36	33
Spending more time on esports	16	13	5	3	9	12	13	9
Spending more time on hobbies / pastimes	40	36	31	31	36	35	38	31
Spending more time socializing as a family / household	50	48	48	37	50	47	51	42
Spending more time using online learning platforms for your child(ren)	3	25	25	7	20	19	27	12
Spending more time using online learning platforms for yourself	55	35	21	14	33	35	33	37
Watching more news coverage	58	58	64	60	59	60	61	53
Watching more shows / films on streaming services (e.g. Netflix)	53	58	46	35	53	50	57	43
Watching more TV on broadcast channels	40	42	47	48	41	46	46	39
Watching more videos (e.g. on YouTube)	62	55	44	30	51	52	54	46
None of these	1	2	4	7	3	3	2	3

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 three 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	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Creating / uploading videos (e.g. on YouTube, TikTok, etc)	7	2	10	3	5	1	1	16	1	2	1	3	11	3	9	3	1	3
Listening to more podcasts	6	6	12	4	3	4	4	11	9	2	2	5	6	4	8	5	6	5
Listening to more radio	6	6	10	8	3	7	11	9	12	8	3	7	9	9	18	11	11	5
Listening to more streaming services (e.g. Spotify, Apple Music, etc)	15	10	21	8	17	7	3	23	9	6	4	10	22	8	13	8	8	8
Reading more books / listening to more audiobooks	15	11	23	16	13	9	12	19	19	16	6	12	14	9	20	21	14	15
Reading more magazines	6	2	5	3	4	5	2	14	2	5	3	1	5	3	9	3	3	3
Reading more newspapers	8	4	7	4	4	5	7	24	5	6	5	2	6	14	8	5	4	4
Spending longer on messaging services (e.g. WhatsApp, Facebook Messenger, etc)	19	6	25	8	22	11	8	27	10	12	2	12	23	16	21	15	11	5
Spending longer on social media (e.g. Facebook, Instagram, Twitter, etc)	17	8	22	9	17	8	5	29	8	7	7	10	32	16	17	11	6	9
Spending longer talking on the telephone to others	9	7	8	9	10	14	8	10	11	11	2	9	6	4	9	8	9	7
Spending more time on apps	12	4	13	5	14	4	3	18	3	5	2	5	17	8	13	5	4	3
Spending more time cooking	21	19	16	23	24	24	12	20	21	26	4	25	24	17	28	16	22	24
Spending more time on computer / video games	11	6	18	9	8	9	6	18	5	9	9	9	18	7	9	9	6	6
Spending more time on esports	4	1	5	1	3	2	1	7	1	2	1	1	7	3	4	3	1	2
Spending more time on hobbies / pastimes	17	15	15	18	19	14	12	16	21	19	20	17	21	11	19	4	15	13
Spending more time socializing as a family / household	27	16	20	17	36	19	20	23	19	26	11	19	32	17	24	22	12	18
Spending more time using online learning platforms for yourself	14	6	22	8	13	5	4	25	9	8	4	8	25	12	20	8	7	6
Spending more time using online learning platforms for your child(ren)	8	3	6	3	13	3	2	7	2	3	2	4	6	3	9	5	3	3
Watching more news coverage	23	13	23	16	29	10	18	27	13	13	18	18	30	26	28	12	12	10
Watching more shows / films on streaming services (e.g. Netflix)	20	16	30	19	18	11	11	28	18	16	6	20	28	19	22	20	17	16
Watching more TV on broadcast channels	13	10	15	9	10	12	10	20	8	7	25	8	16	10	15	6	10	11
Watching more videos (e.g. on YouTube)	24	13	28	15	25	6	8	37	16	9	12	17	39	23	27	15	10	11
None of these	10	20	10	20	5	20	18	5	14	16	21	19	5	13	9	19	20	19

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

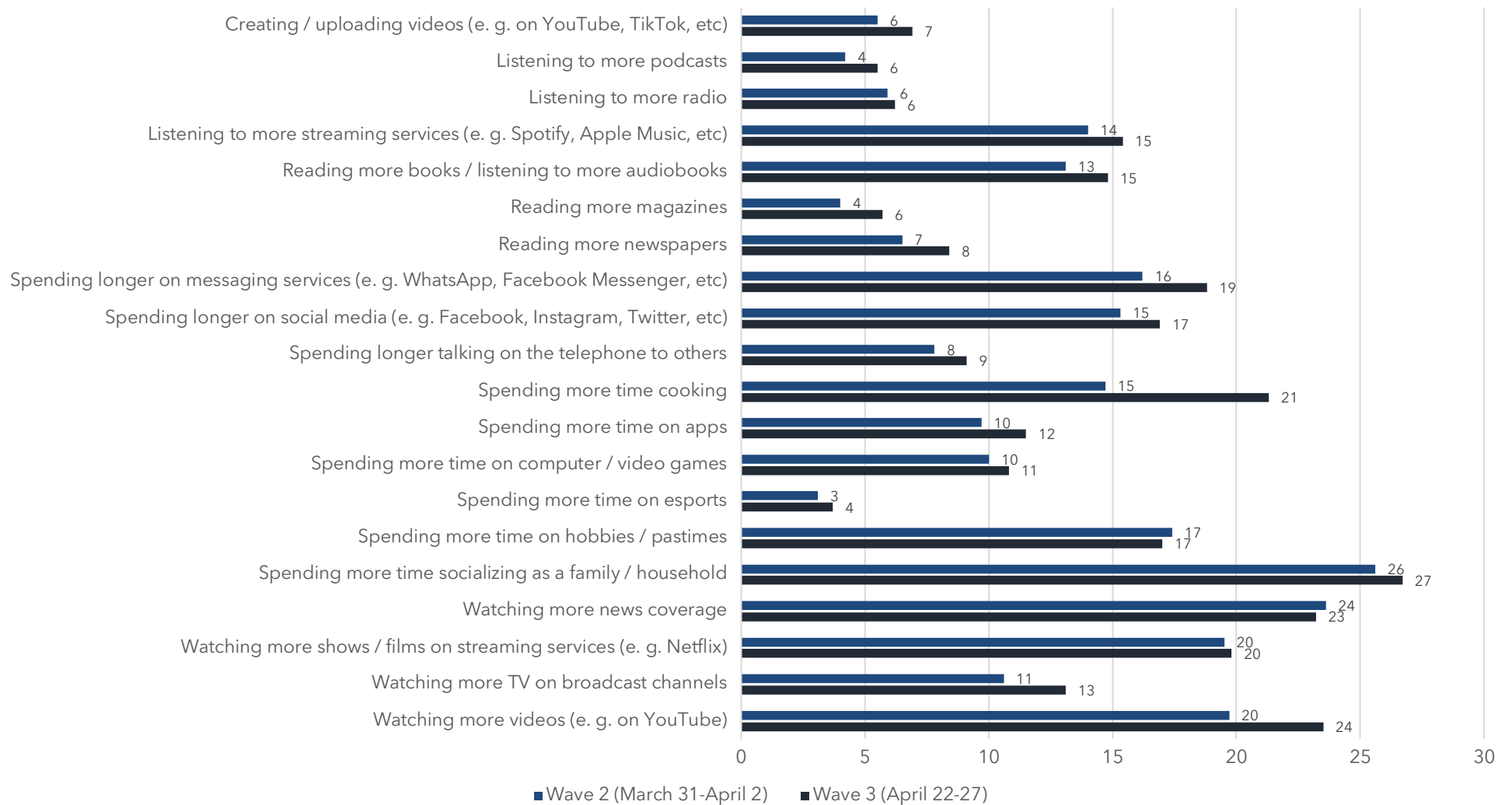
% who say they expect to carry on doing the following, once the coronavirus / COVID-19 outbreak is over*

	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	6	7	9	9
Listening to more podcasts	7	7	4	3	5	6	7	4
Listening to more radio	5	6	7	8	6	6	6	6
Listening to more streaming services (e.g. Spotify, Apple Music, etc)	23	16	10	6	16	15	16	16
Reading more books / listening to more audiobooks	19	15	12	15	17	13	16	15
Reading more magazines	6	7	4	4	5	7	8	6
Reading more newspapers	11	8	7	7	8	9	9	9
Spending longer on messaging services (e.g. WhatsApp, Facebook Messenger, etc)	24	19	17	8	20	18	20	20
Spending longer on social media (e.g. Facebook, Instagram, Twitter, etc)	23	18	12	8	18	16	17	16
Spending longer talking on the telephone to others	10	9	8	8	9	9	10	8
Spending more time cooking	18	23	21	19	26	17	24	17
Spending more time on apps	19	12	7	4	12	11	15	11
Spending more time on computer / video games	15	12	7	3	8	13	12	11
Spending more time on esports	4	5	2	1	3	4	5	2
Spending more time on hobbies / pastimes	21	16	16	15	18	17	20	15
Spending more time socializing as a family / household	22	28	29	20	30	24	31	23
Spending more time using online learning platforms for yourself	22	15	9	5	14	14	16	14
Spending more time using online learning platforms for your child(ren)	1	12	9	4	9	8	13	6
Watching more news coverage	20	23	27	23	21	25	26	19
Watching more shows / films on streaming services (e.g. Netflix)	24	22	16	13	20	19	22	18
Watching more TV on broadcast channels	12	14	14	11	11	15	15	15
Watching more videos (e.g. on YouTube)	31	26	18	10	23	24	24	22
None of these	6	8	12	19	9	10	9	11

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 both 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	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Games console	16	16	25	19	13	17	12	23	13	12	18	11	11	8	17	14	17	14
Laptop	45	41	48	44	45	40	32	56	47	45	11	49	50	53	61	49	42	38
PC / desktop	32	24	42	31	31	31	24	37	18	26	49	23	32	26	28	28	18	23
Smartphone / mobile phone	71	45	78	45	81	52	39	79	56	67	46	55	82	72	80	63	45	45
Smart speaker	13	6	7	8	14	6	6	24	4	6	4	3	7	5	8	7	7	10
Smart TV / media streaming device	31	20	47	24	32	12	21	36	22	29	10	25	27	23	28	31	24	32
Smartwatch	9	4	7	4	9	3	4	17	4	4	4	4	5	6	6	5	4	6
Tablet	23	17	15	21	26	18	15	22	18	22	18	19	18	20	19	25	22	21
Other	1	0	1	1	1	1	1	3	0	2	1	1	2	0	2	1	1	1
None of these	6	14	3	8	3	15	25	1	6	3	13	7	1	4	2	2	13	15

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*

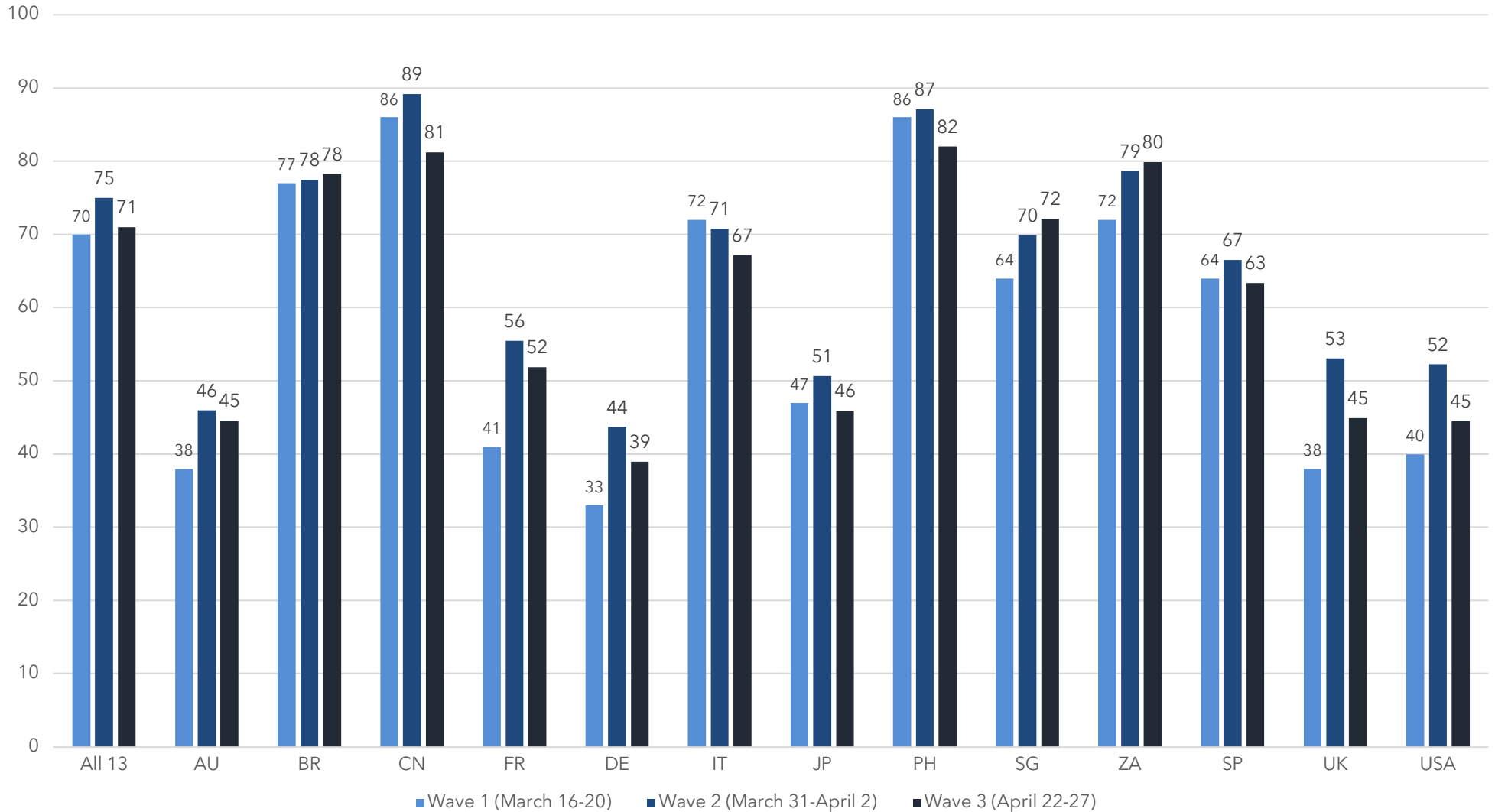
*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Games console	17	21	12	3	12	20	19	13
Laptop	55	45	40	35	44	46	50	42
PC / desktop	29	31	34	36	27	36	34	31
Smartphone / mobile phone	74	74	67	52	73	68	72	67
Smart speaker	14	16	9	4	12	14	17	11
Smart TV / media streaming device	26	36	31	24	31	31	40	25
Smartwatch	12	11	4	2	7	10	11	8
Tablet	23	25	19	20	25	20	29	18
Other	2	1	1	1	1	2	1	2
None of these	2	5	8	13	6	6	4	7

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

Smartphone Usage: Trended Data

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



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



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