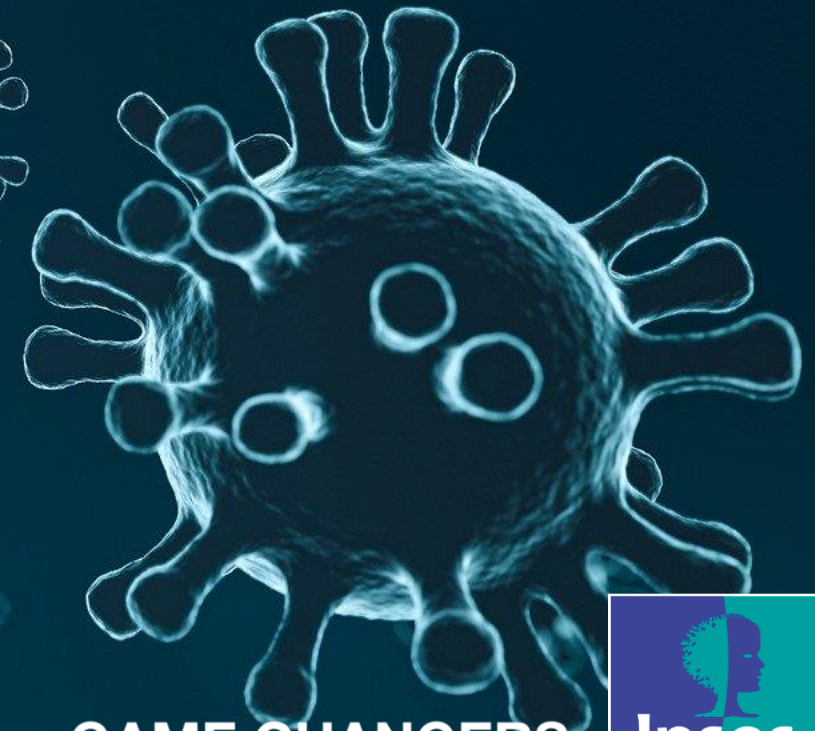


COVID-19 MENA CONSUMER SENTIMENT TRACKER

UNDERSTANDING ATTITUDES, BEHAVIORS AND FUTURE EXPECTATIONS

(KSA, UAE, Egypt, Morocco, Jordan, Lebanon)

Wave 1: 20th – 23rd March, 2020



GAME CHANGERS



KEY HIGHLIGHTS

1- People Support Strict Measures to Contain The Virus

People are largely supporting of the idea of self-containment to help stopping the spread of the virus.

2- Fears Towards Financial Security Outweigh Concerns on Personal Health

People believe the virus is more likely to impact their jobs and financial wellbeing as opposed to personal health.

3- Precautionary Measures Are Displayed Across MENA. However, There Are Differences

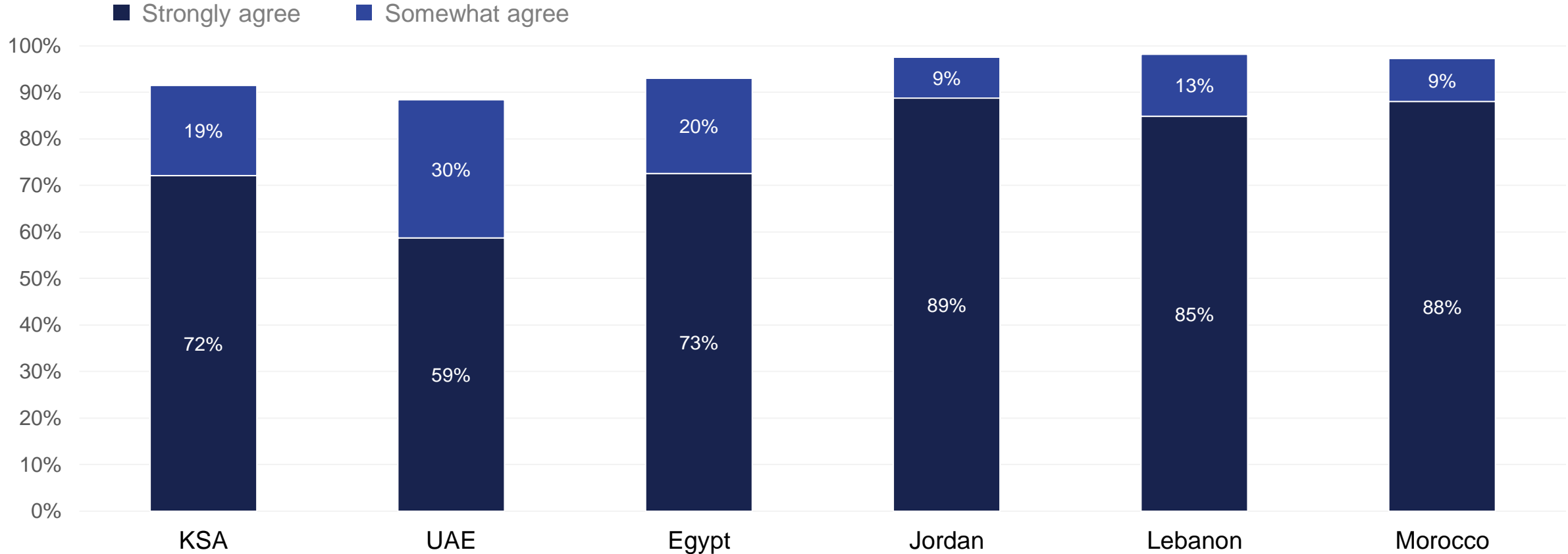
The vast majority across the region are spending more time at home and there is an increase in e-commerce. People in Jordan and Lebanon more likely to stock up on food and water compared to other countries.

4- Significant Level of Distrust Towards What People Are Hearing About COVID-19

Many believe that the media exaggerates the magnitude of the situation, and that a significant amount of the information they are receiving about the virus is inaccurate.

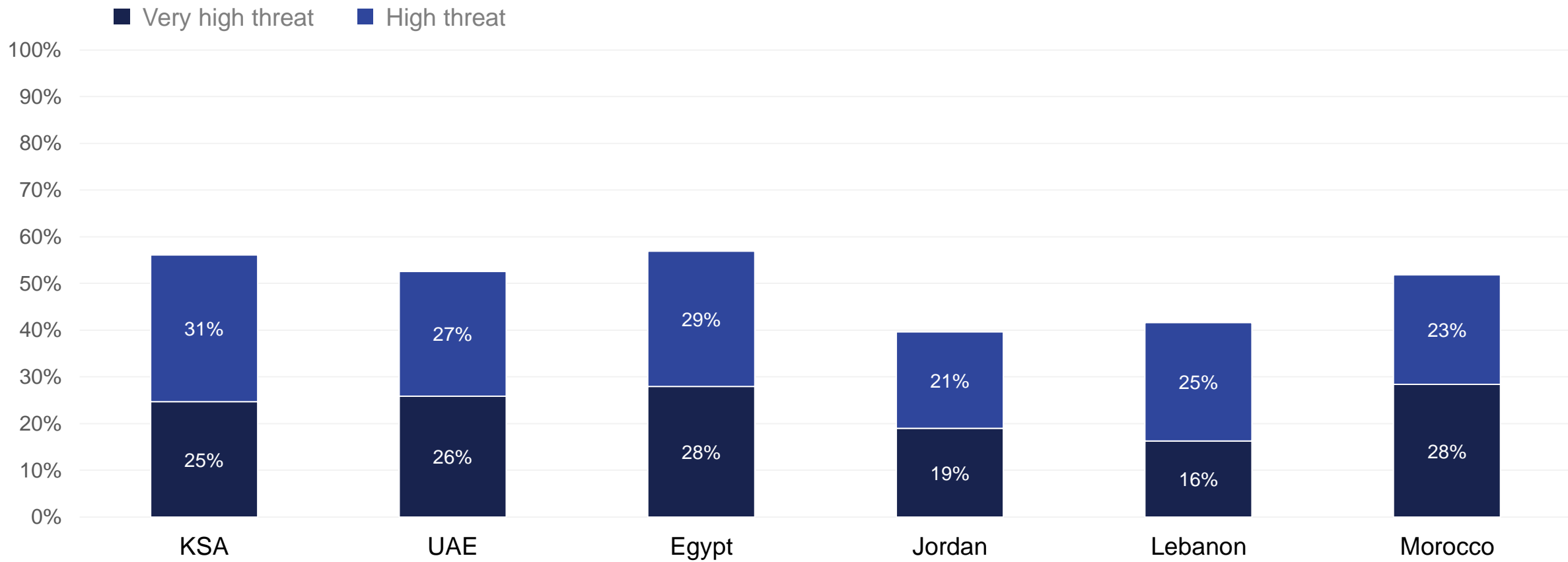
HIGH SUPPORT FOR CLOSING BORDERS - NOTICEABLY LOWER IN THE UAE.

We should close the borders of my country and not allow anyone in or out until the virus is proven to be contained



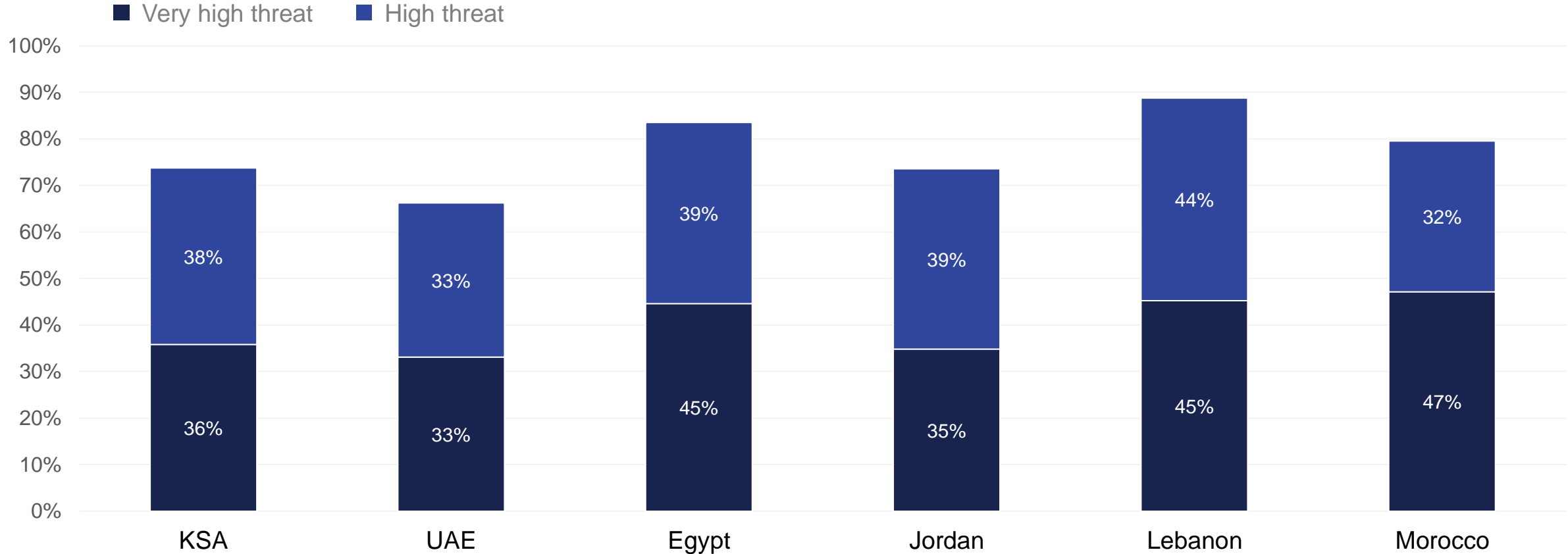
PERCEIVED PERSONAL THREAT IS RELATIVELY LOW ACROSS ALL COUNTRIES, BUT MUCH LOWER IN JORDAN AND LEBANON.

What level of threat do you think the coronavirus poses to you personally?



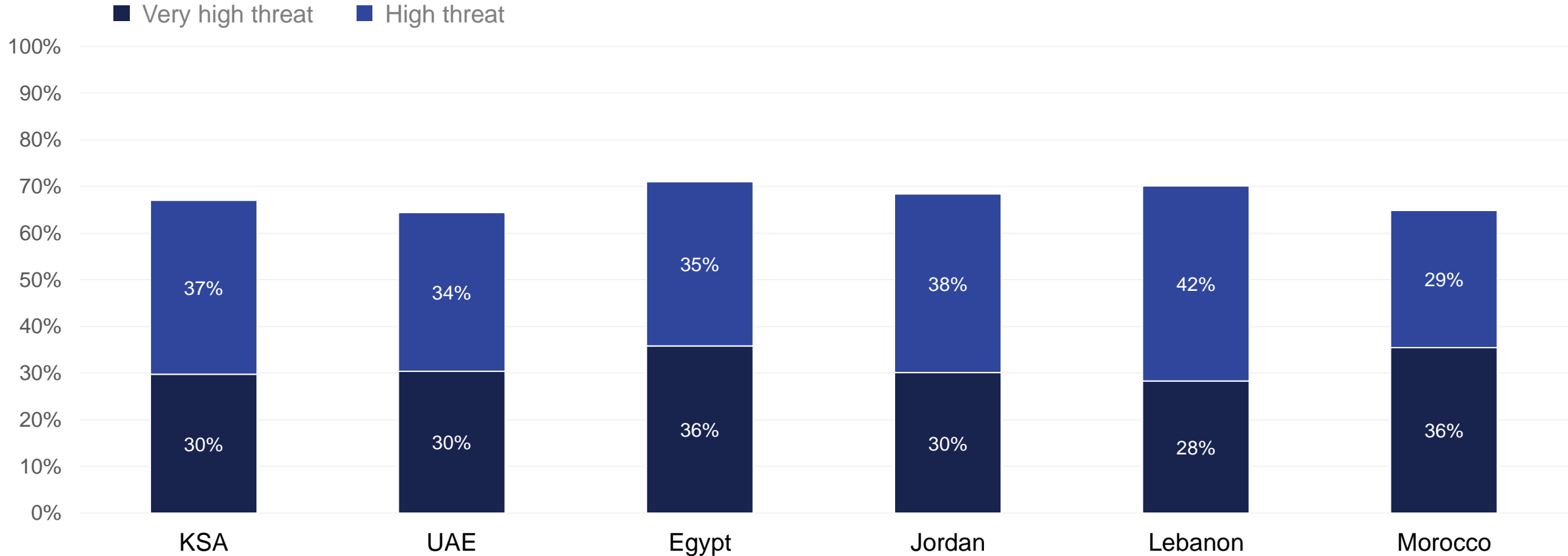
MAJORITY ARE CONCERNED WITH THE THREAT OF COVID-19 TO THEIR COUNTRY, WITH UAE SLIGHTLY LOWER.

What level of threat do you think the coronavirus poses to your country?



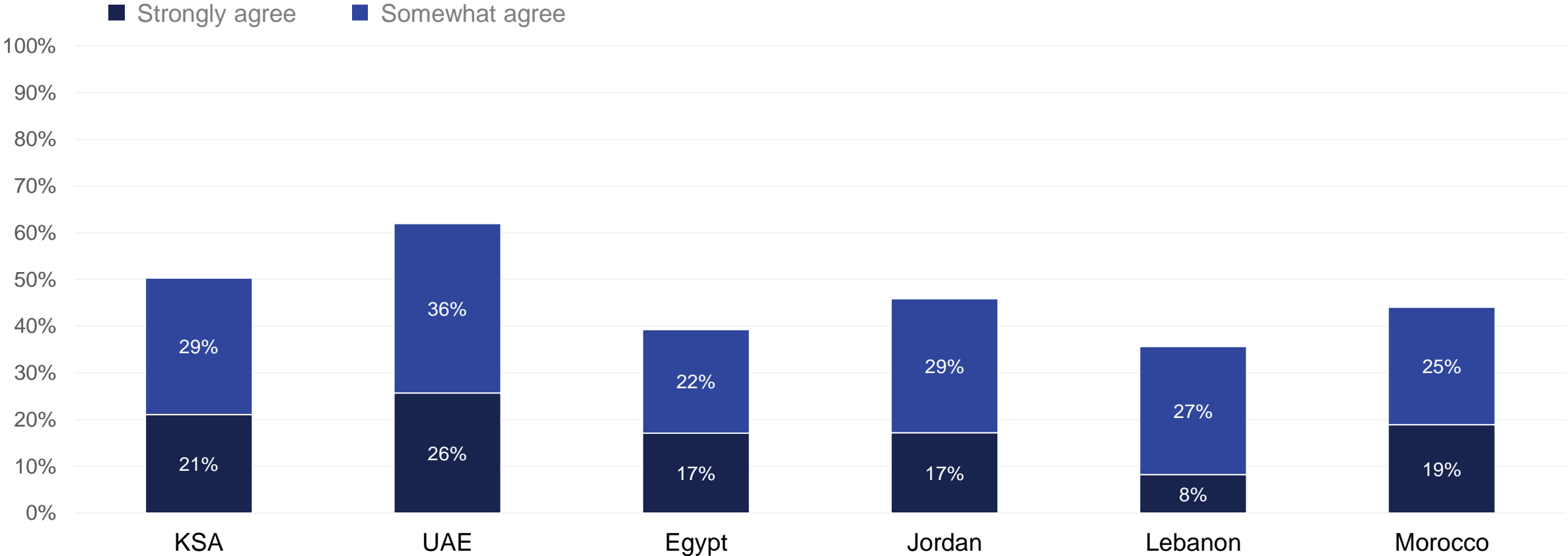
MAJORITY ALSO CONCERNED WITH THE IMPACT ON THEIR JOBS, WITH SIMILAR LEVELS OF CONCERN ACROSS THE REGION.

What level of threat do you think the coronavirus poses to your job or business?



UAE HIGHLY LIKELY TO THINK THE MEDIA IS EXAGGERATING. THE REST OF THE REGION IS SIGNIFICANTLY MORE TRUSTING.

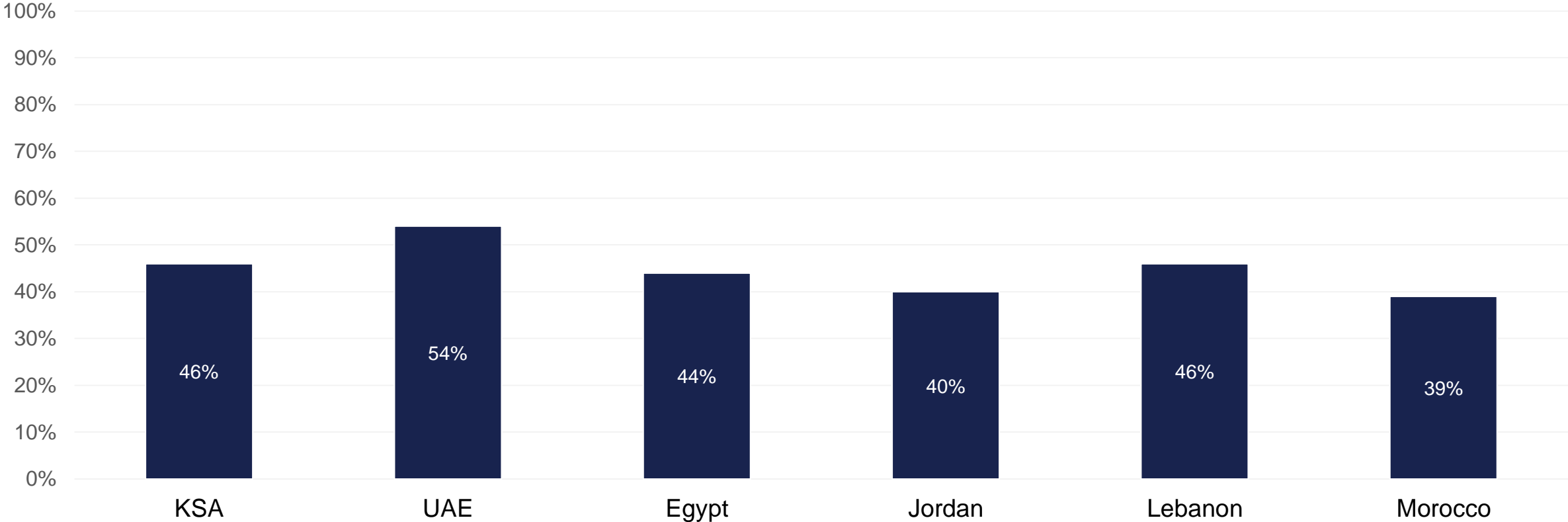
The media has exaggerated the extent of the coronavirus outbreak



TRUST IN THE ACCURACY OF CORONAVIRUS ASSOCIATED INFORMATION IS SIMILAR THROUGHOUT THE MENA REGION.

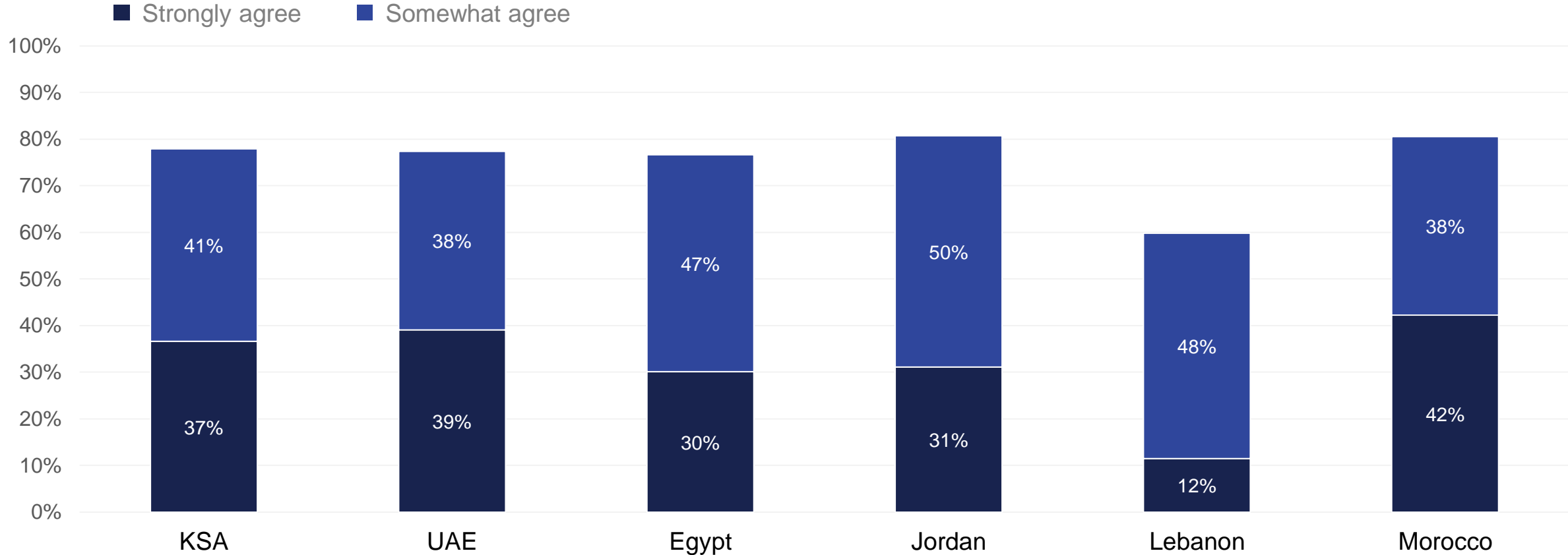
How much of the information you have been receiving about Corona do you think is inaccurate?

% of inaccurate information received



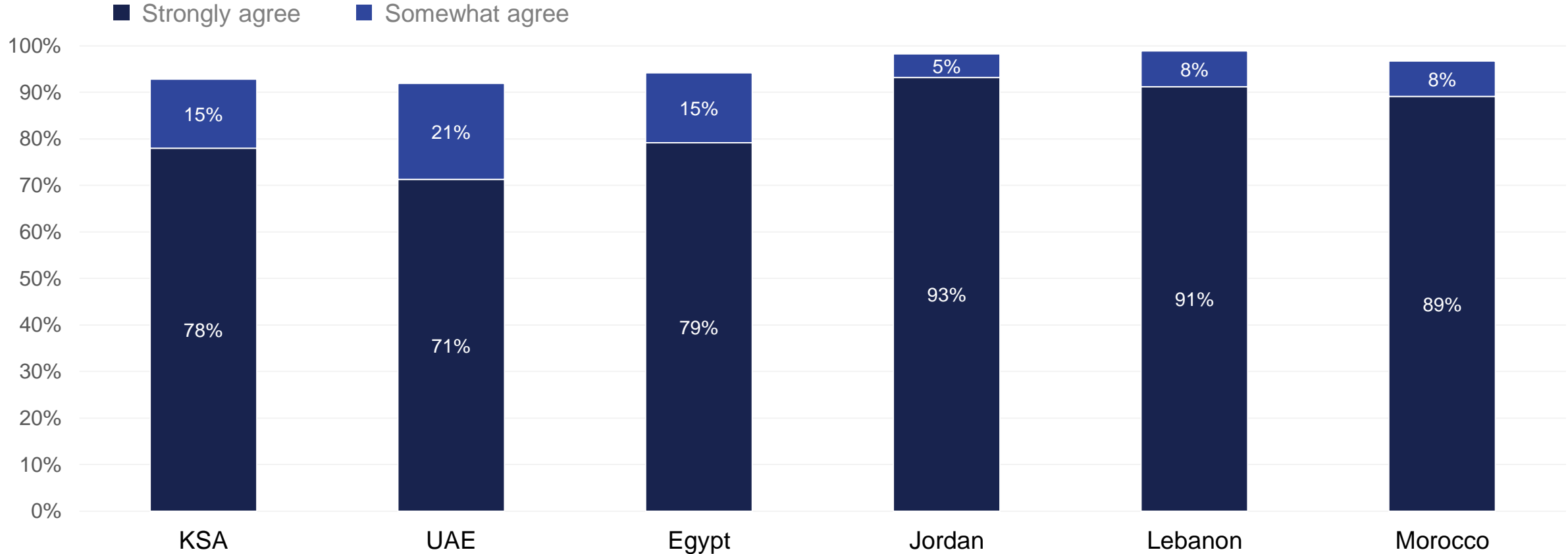
LEBANON LEAST OPTIMISTIC IN THINGS GOING BACK TO NORMAL IN JUNE.

I expect things to return to normal by June



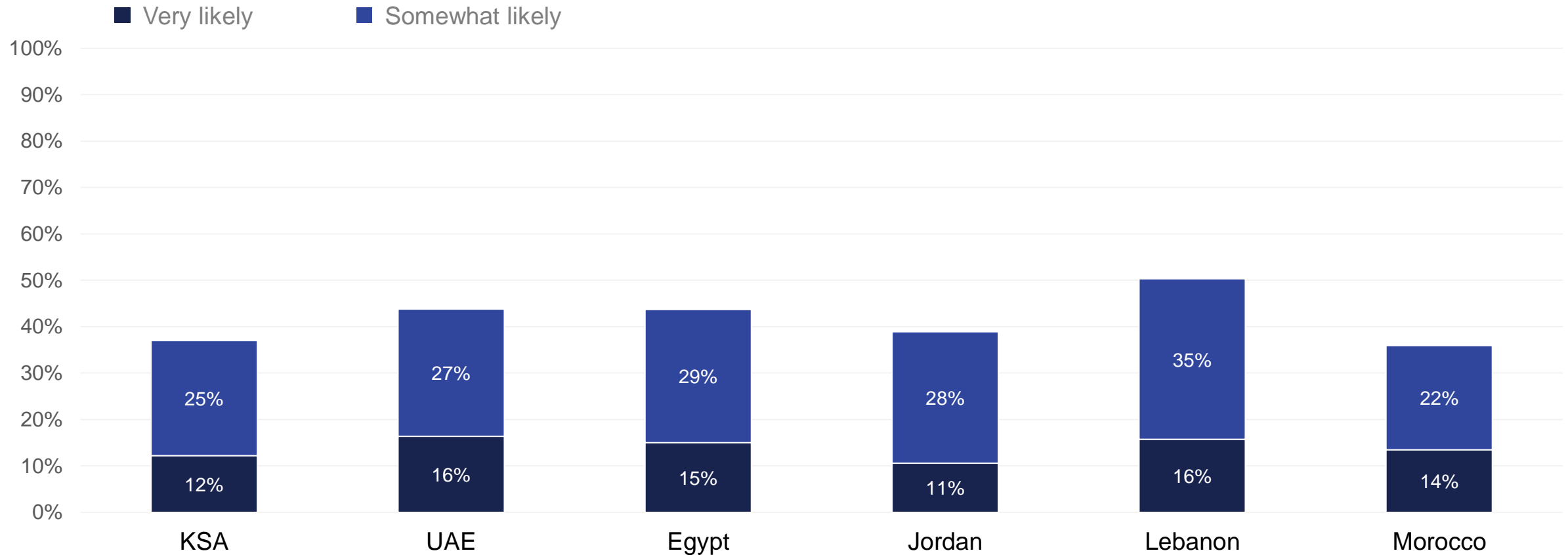
THE IDEA OF SELF-QUARANTINE IS ACCEPTED ACROSS THE REGION, WITH MOST SHOWING WILLINGNESS.

If I were diagnosed, I would quarantine myself immediately for at least 14 days.



EXPECTATIONS OF SOMEONE CLOSE BEING INFECTED MOST NOTICEABLE IN LEBANON FOLLOWED BY UAE AND EGYPT.

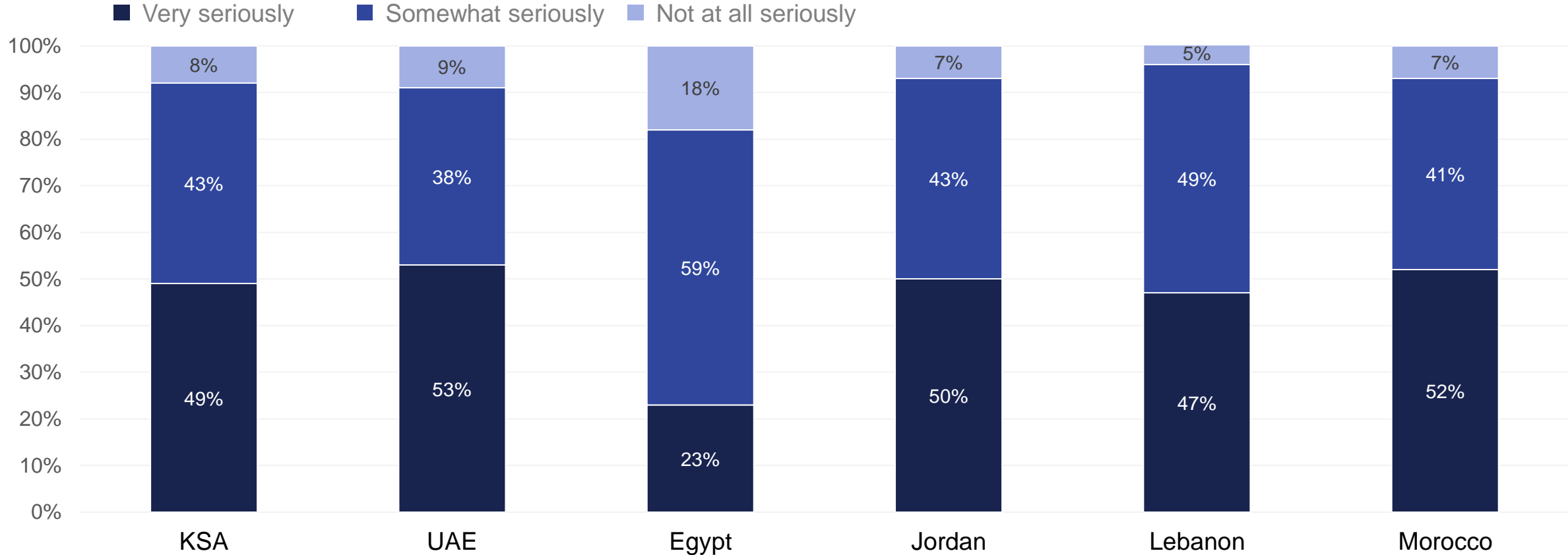
Someone close to me will be infected by the virus.



How likely or unlikely do you think each of the following are to occur as a result of the Coronavirus or COVID-19?

MOST PERCEIVE PEOPLE AROUND THEM TO BE TAKING THE CORONAVIRUS SERIOUSLY, EGYPT TO A LESSER EXTENT.

How seriously would you say people around you are taking the Coronavirus threat?

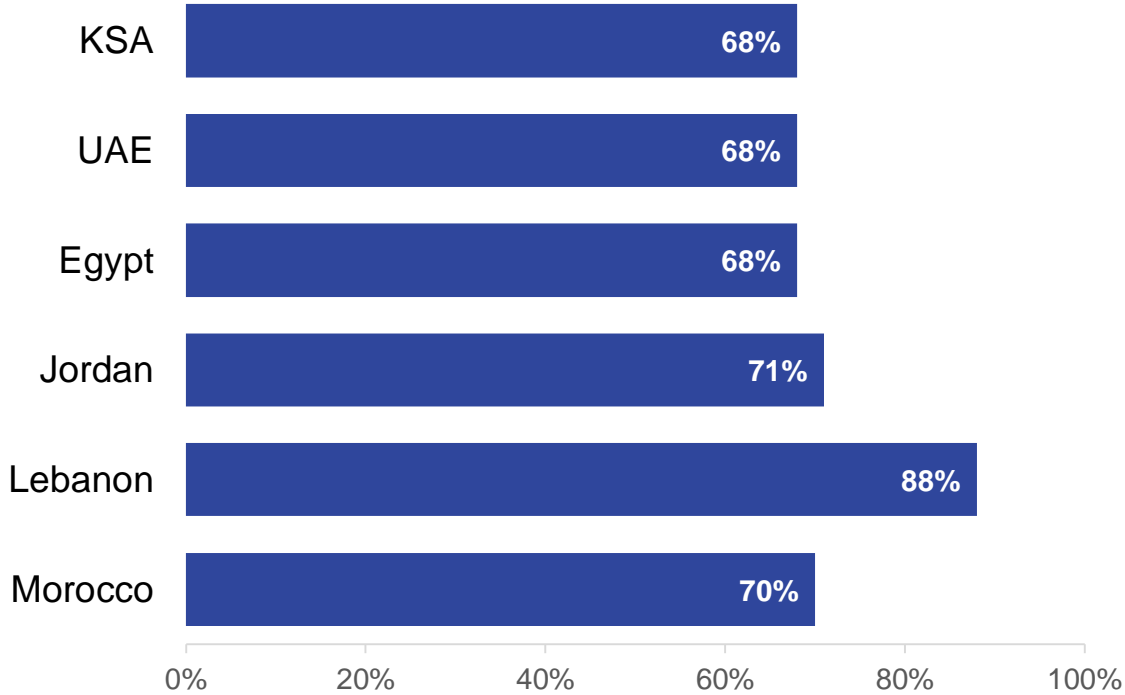


SUBSTANTIAL INCREASES IN TIME SPENT AT HOME. DELIVERY OF FOOD AND GROCERIES ONLY SLIGHTLY UP, LESS SO IN JORDAN AND MOROCCO.

Thinking now about your day to day activities, would you say you are doing each of the following more frequently or less frequently compared to one month ago?

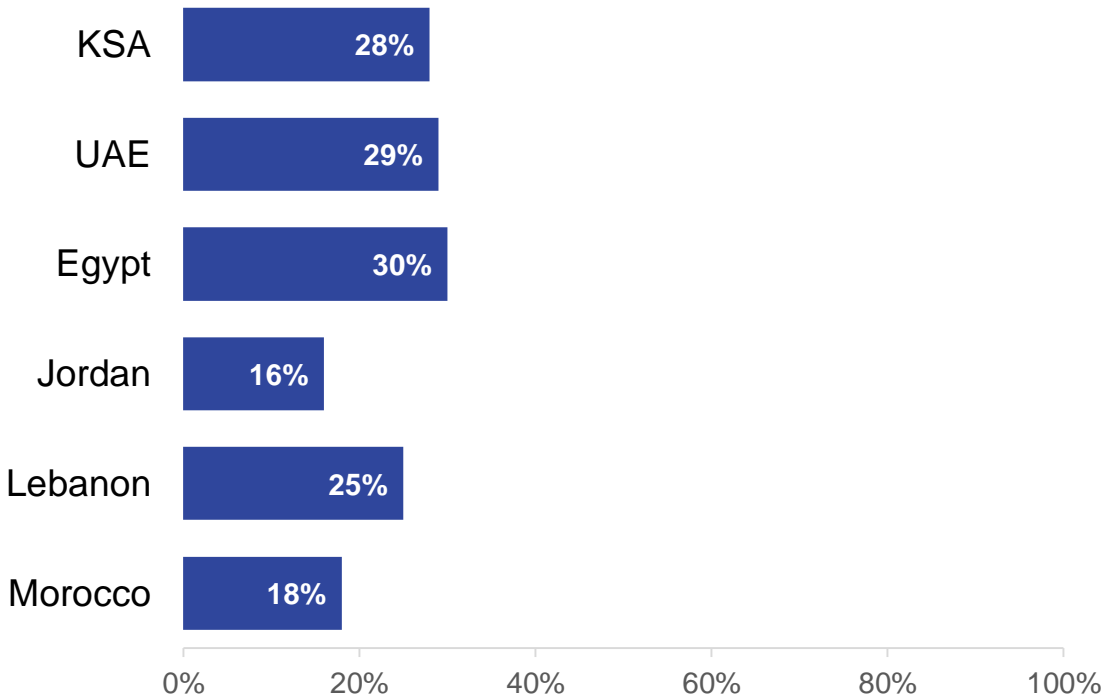
% More frequently

Spending Time at Home



% More frequently

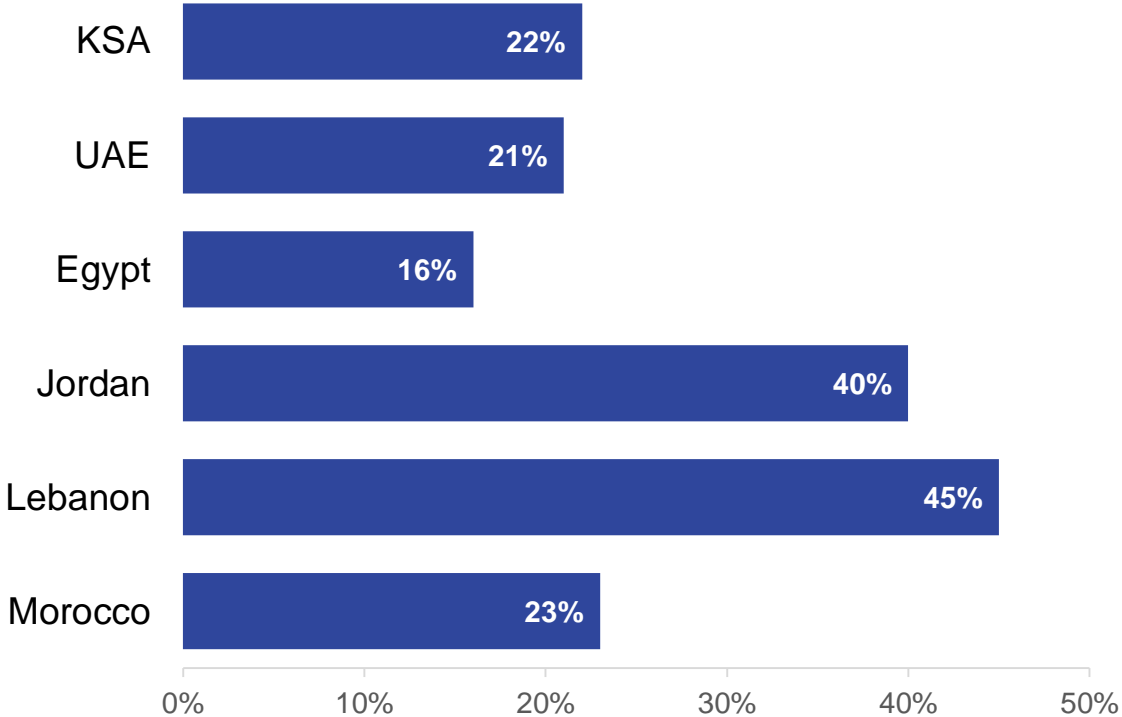
Have food or groceries delivered to your home



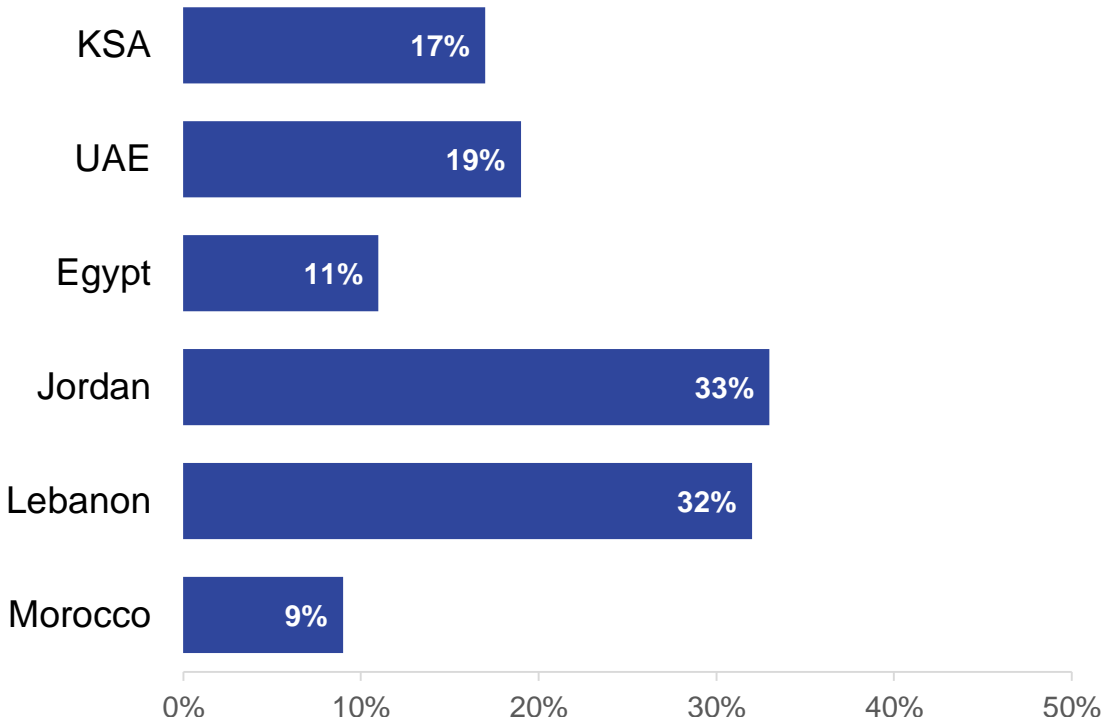
STOCKPILING BEHAVIOR PREVALENT IN LEBANON AND JORDAN WHILE RELATIVELY LOWER IN THE REMAINDER OF THE REGION.

Have you started doing any of the following specifically to protect yourself from COVID-19?

Stocking Up on Food



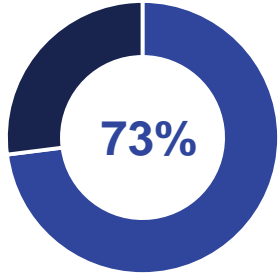
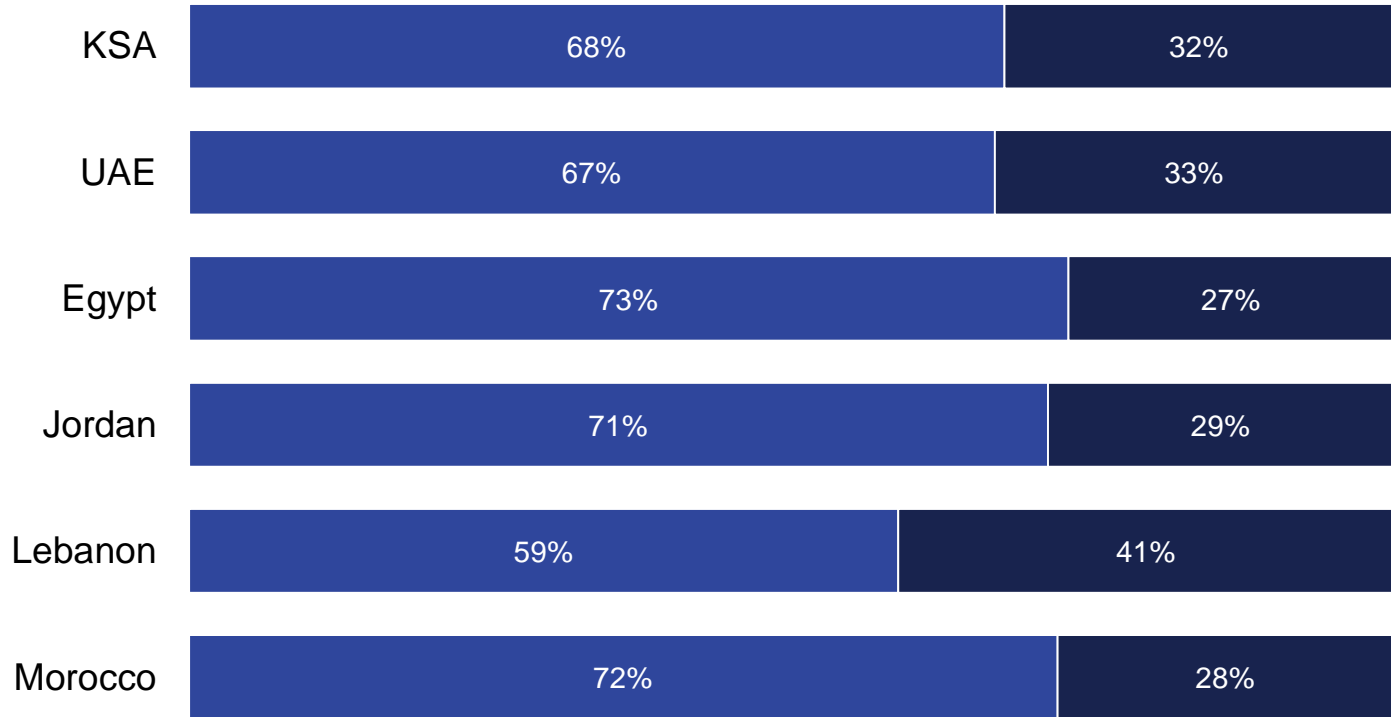
Stocking Up on Water



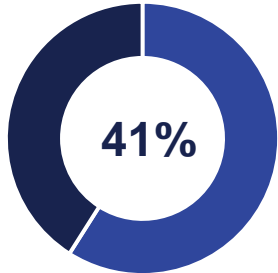
SUPPLY SHORTAGES' ACCOUNTABILITY WILL BE DIRECTED AT ABNORMAL STOCKPILING RATHER THAN SUPPLY CHAIN INEFFICIENCIES.

If there is a shortage of food and supplies at my local grocery store, it will be because of...

■ People stockpiling food and other products ■ Because of a disruption in the supply and distribution of food and other products



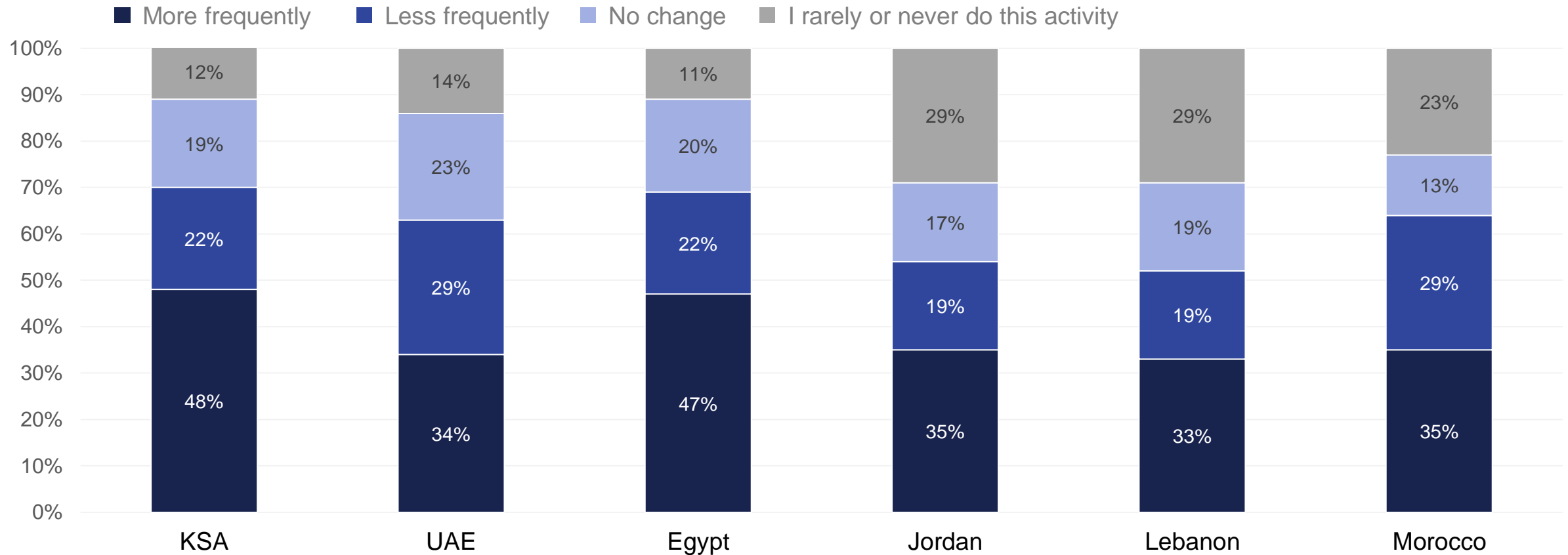
Egypt most likely to blame irregular stockpiling for any upcoming shortages.



Lebanon most likely to hold supply chains liable for any forthcoming scarcities.

EVIDENT RISE IN RESORTING TO E-COMMERCE IN KSA AND EGYPT IN SPECIFIC, WITH SIGNS OF SIMILAR SHIFTS ACROSS THE REGION.

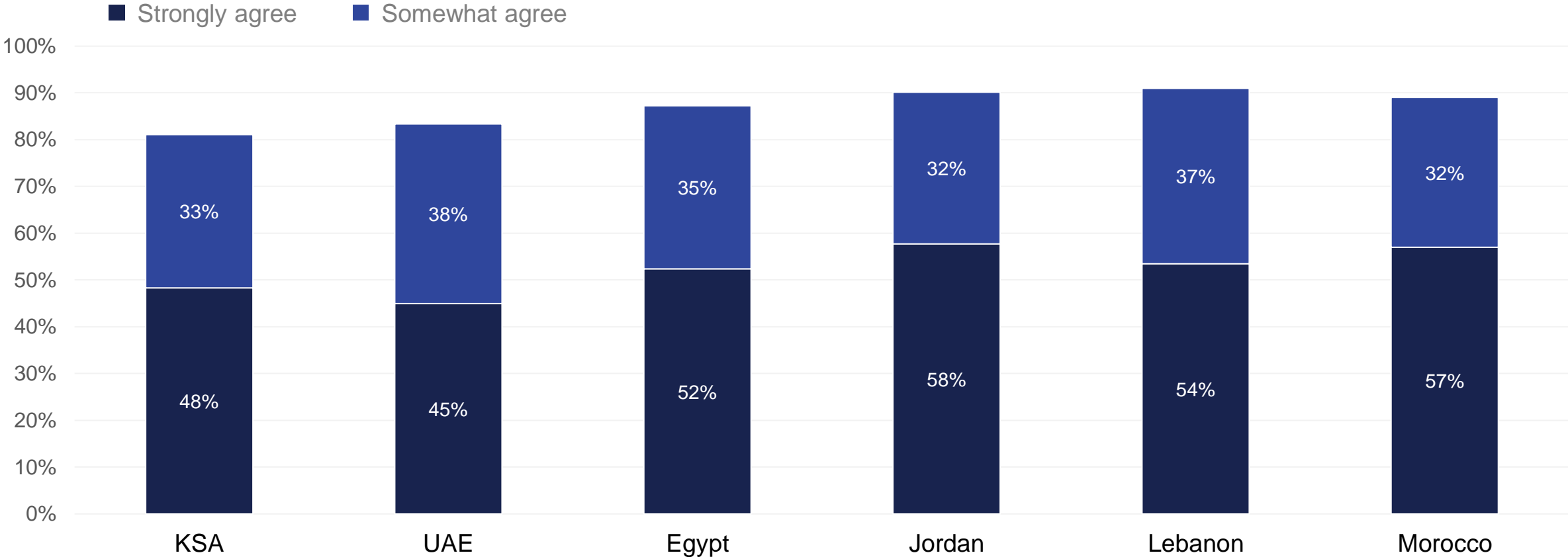
Using e-commerce to purchase products you would normally buy in-store



What about each of the following, would you say are doing each of the following more frequently or less frequently compared to one month ago?

MAJORITY IN MOST COUNTRIES FORESEE AN IMPACT ON THEIR FINANCIAL SITUATION WITH THE DISTRESS SLIGHTLY LOWER IN KSA AND UAE.

The coronavirus will have a financial impact on you and your family.



METHODOLOGY AND NOTES

METHODOLOGY

These are the results of an Ipsos survey conducted March 20-23 2020 in the MENA Region. The study covered KSA, UAE, Egypt, Jordan, Lebanon and Morocco and was conducted through online surveys.

For KSA & UAE, the sample is representative of the general population, as for Egypt, Jordan, Lebanon and Morocco the sample represents the more urban and connected population.

Where results do not sum to 100 or the 'difference' appears to be +/-1 more/less than the actual, this may be due to rounding, multiple responses or the exclusion of don't knows or not stated responses. The precision of Ipsos online polls are calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points. For more information on the Ipsos use of credibility intervals, please visit the Ipsos website (www.ipsos.com).

Country	Sample
KSA	1000
UAE	1000
Egypt	1000
Jordan	500
Lebanon	500
Morocco	500

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GAME CHANGERS

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So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:

You act better when you are sure.

THANK YOU

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GAME CHANGERS

