

TRACKING THE CORONAVIRUS

RESULTS FROM A MULTI-COUNTRY POLL

March 12-14, 2020

GAME CHANGERS



KEY FINDINGS

Public reaction continues to evolve with experience and proximity to hot spots being major drivers. The public is becoming more engaged and concerned in countries such as China and Italy but still remains somewhat distant for those in North America even though the polling was conducted as social distancing measures and travel bans became active.

Coronavirus is still seen by most as economic crisis as opposed to a health crisis, noting that perception of the health risk increases with proximity to hot spots.

We are seeing increasing levels of concern about personal financial exposure including employment. Movements in markets, reactions by governments and other players appear not to have calmed public concern about economic threat.



KEY FINDINGS

There is support for closing borders and for self quarantining. But broadly this is in theory and not necessarily personal, particularly outside of hot spots.

Most remain optimistic that things will return to normal, even in hot spot countries. This despite many projections indicating the opposite*.

Hoarding is evolving as a real issue with people seeing shortages driven by behavior, not by supply chain issues. Counter measures are kicking in and people are taking steps to cancel plans.



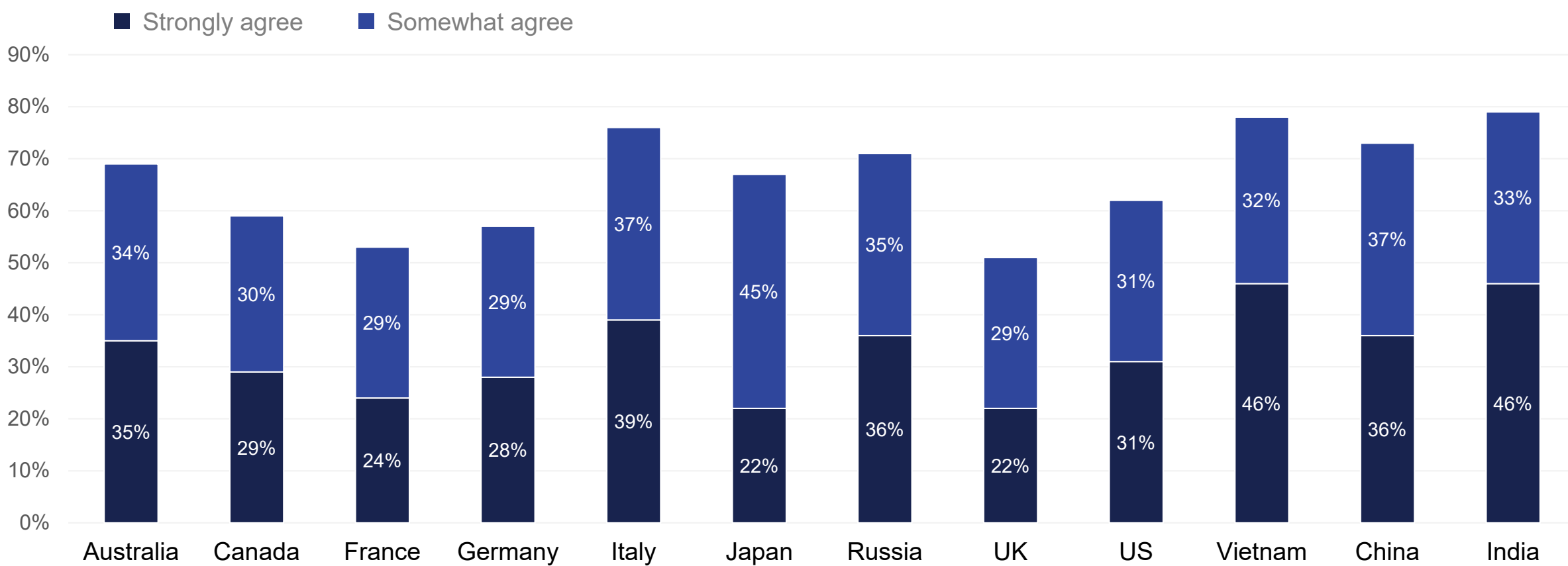
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* For example: <https://www.visualcapitalist.com/infection-trajectory-flattening-the-covid19-curve/>

AGREEMENT WITH CLOSING BORDERS - SUPPORT LOWER IN FRANCE, UK, GERMANY AND CANADA.

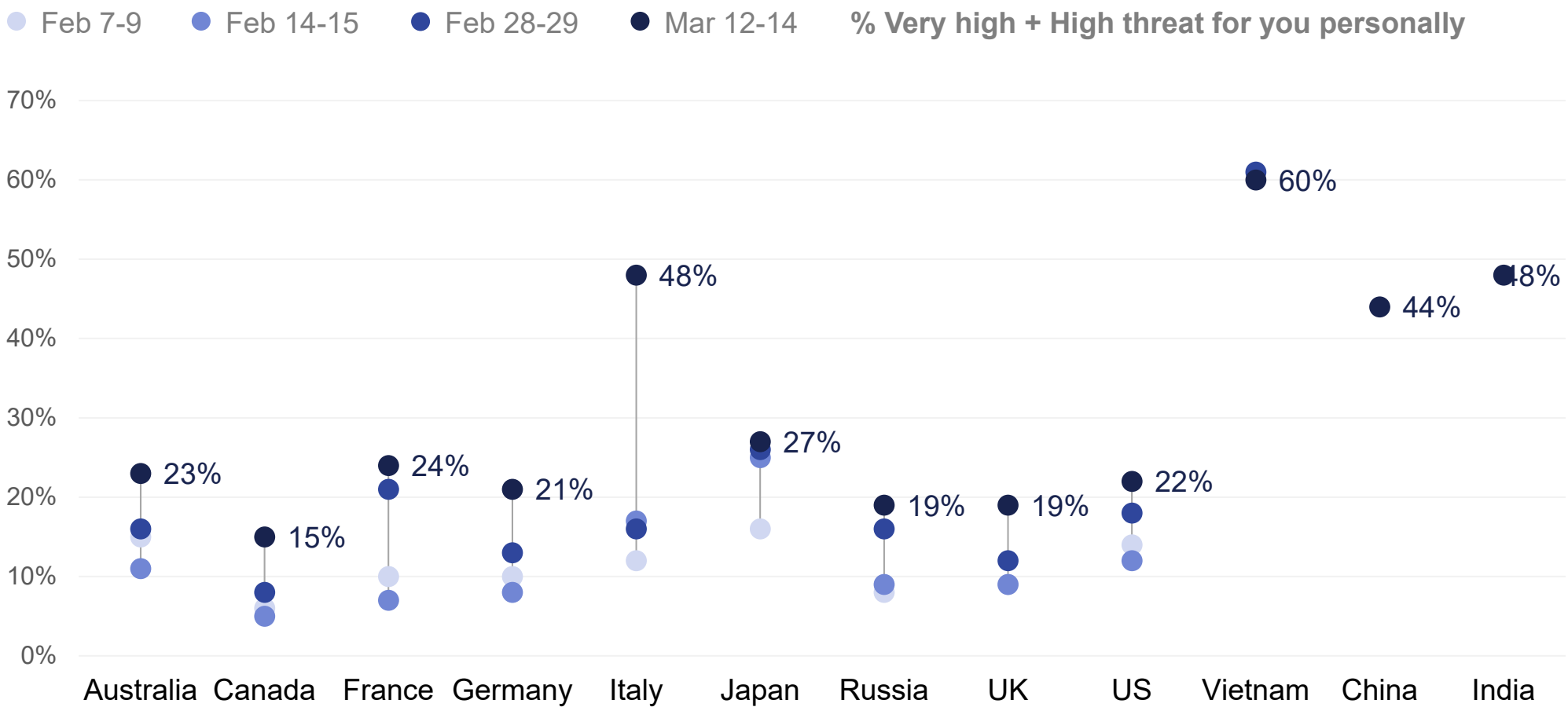
We should close the borders of my country and not allow anyone in or out until the virus is proven to be contained



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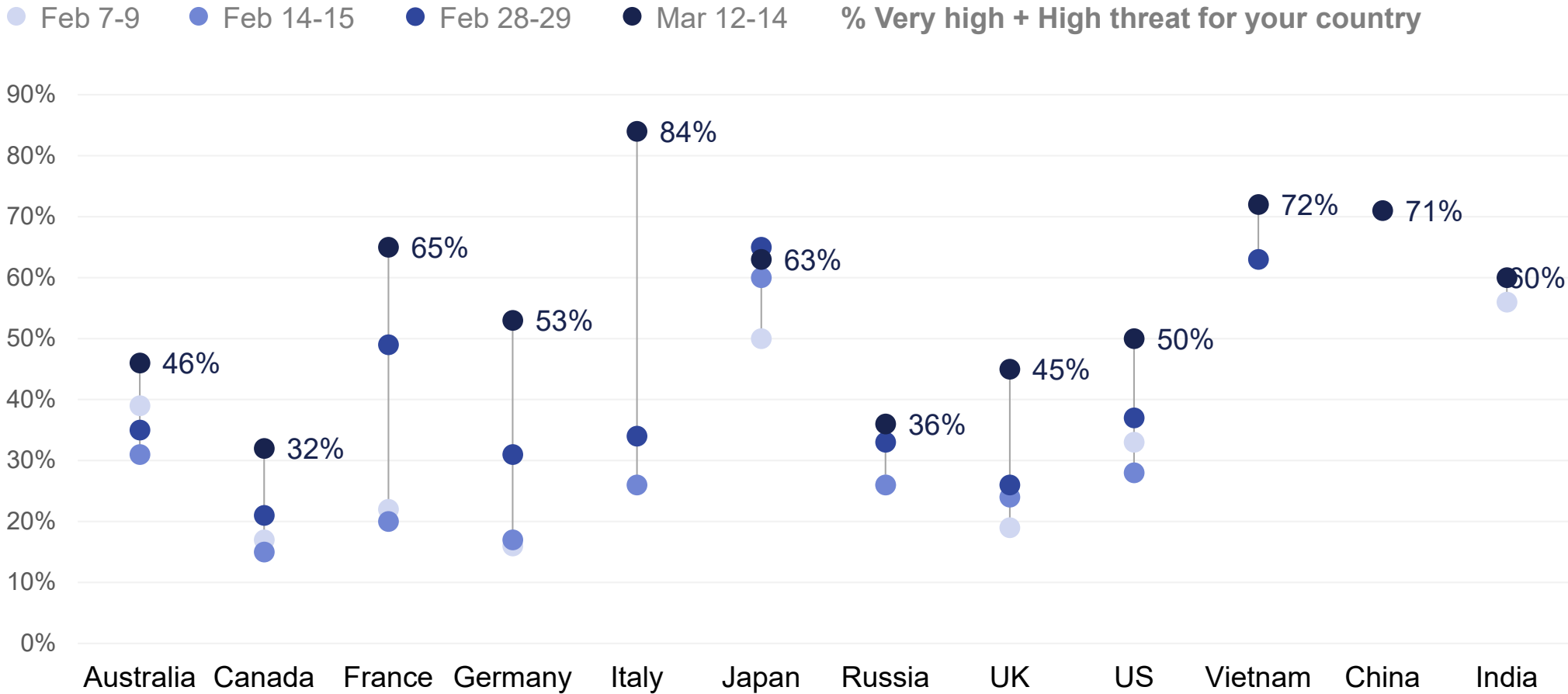
PERCEIVED PERSONAL IMPACT INCREASING, BUT NOT MOVING SIGNIFICANTLY HIGHER IN MOST COUNTRIES



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

See methodology notes for full description of the data collection specifications

RISE IN PERCEPTION OF THREAT TO COUNTRY, ESPECIALLY FRANCE AND GERMANY

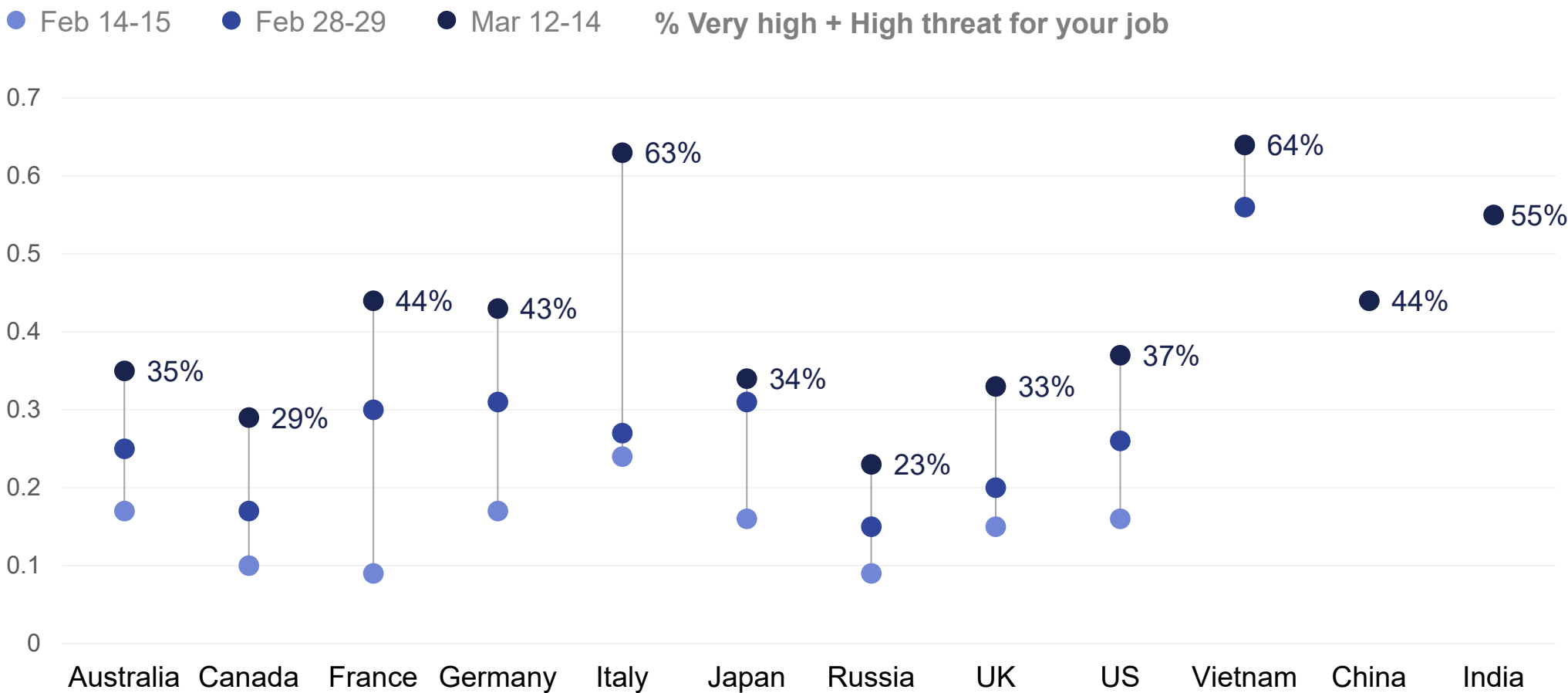


What level of threat do you think the coronavirus poses to **your country**?

See methodology notes for full description of the data collection specifications



RAPIDLY INCREASING CONCERN ABOUT THREAT POSED TO “YOUR JOB OR BUSINESS”

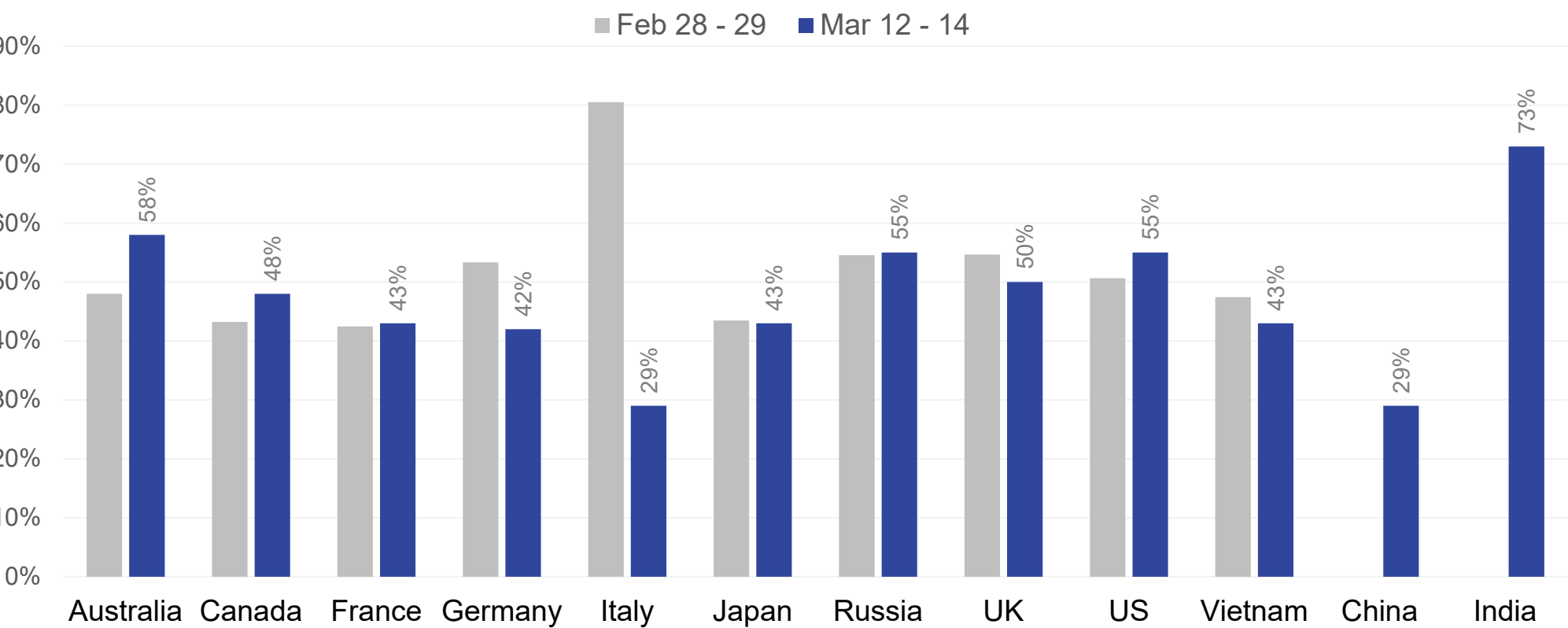


What level of threat do you think the coronavirus poses to **your job or business**?

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ITALY THOUGHT THE MEDIA WAS EXAGGERATING, UNTIL THIS WEEK – NOW AT SIMILAR LEVELS TO CHINA

% Strongly + Somewhat Agree



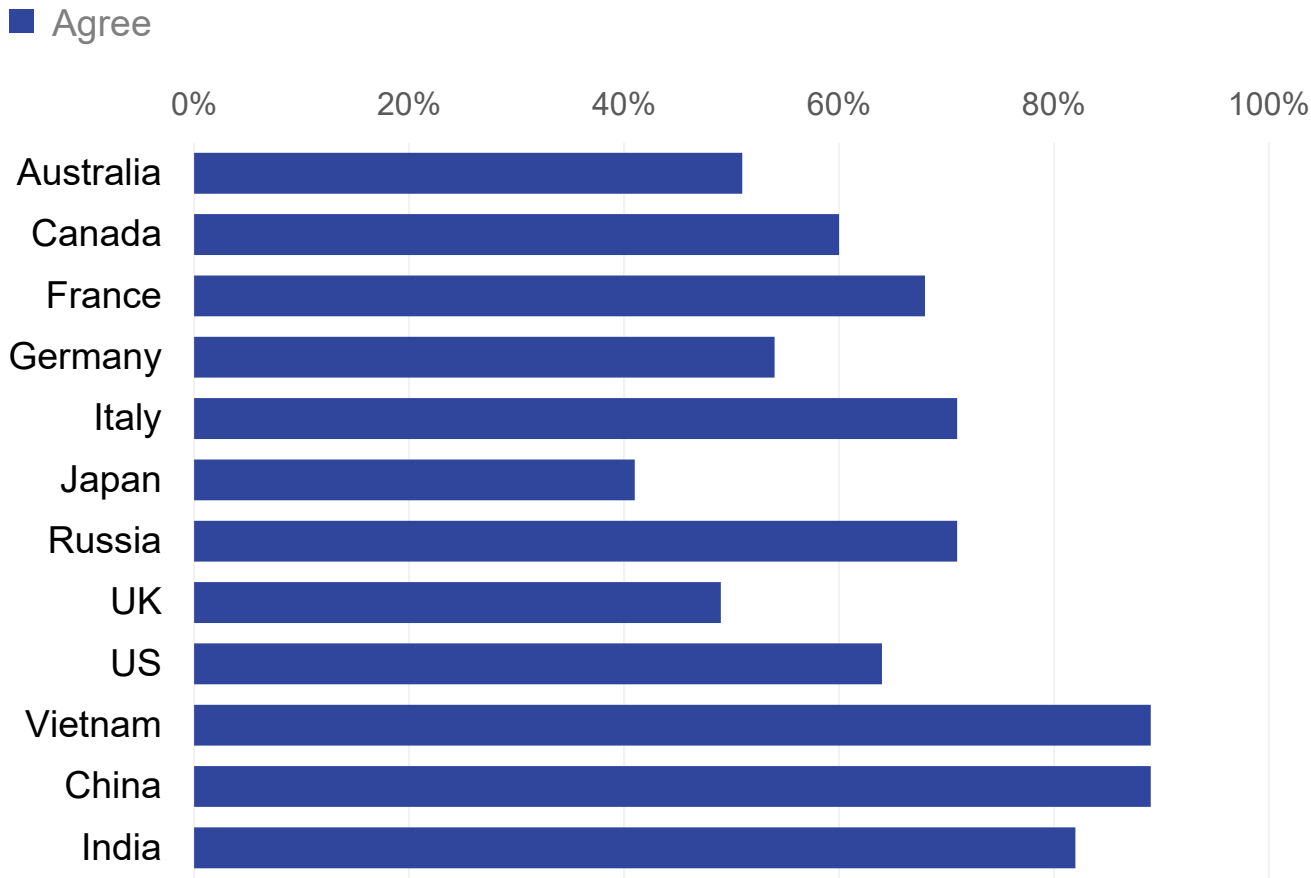
The media has **exaggerated the extent of the coronavirus outbreak?**

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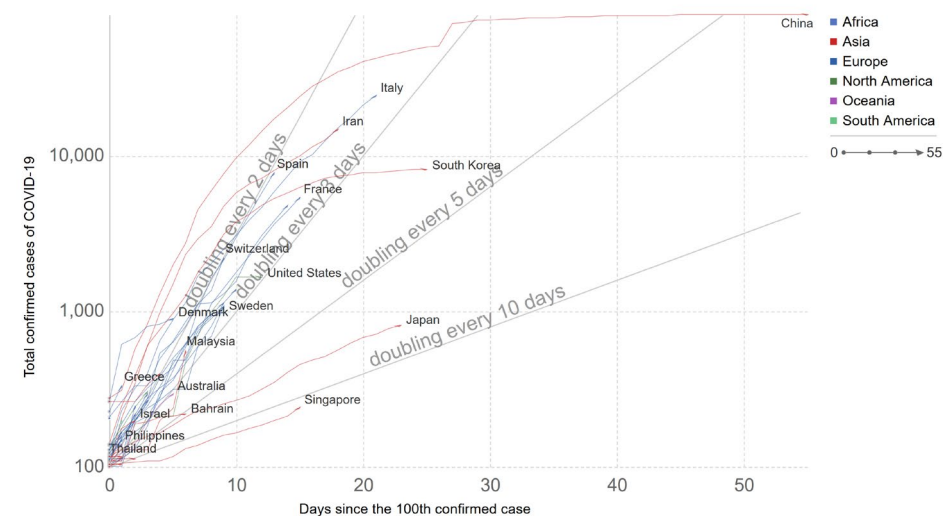
Note: Feb 28-29 used a modified scale; this was adjusted for indicative comparison.

MAJORITIES IN MOST COUNTRIES ARE OPTIMISTIC THAT THINGS WILL RETURN TO NORMAL BY JUNE, DESPITE TRAJECTORIES SHOWING THE OPPOSITE



Total confirmed cases of COVID-19

The starting point for each country is the day that country had reached 100 confirmed cases. This allows us to compare the trajectory of confirmed cases between countries. Because of limited testing the number of confirmed cases is lower than the number of total cases.



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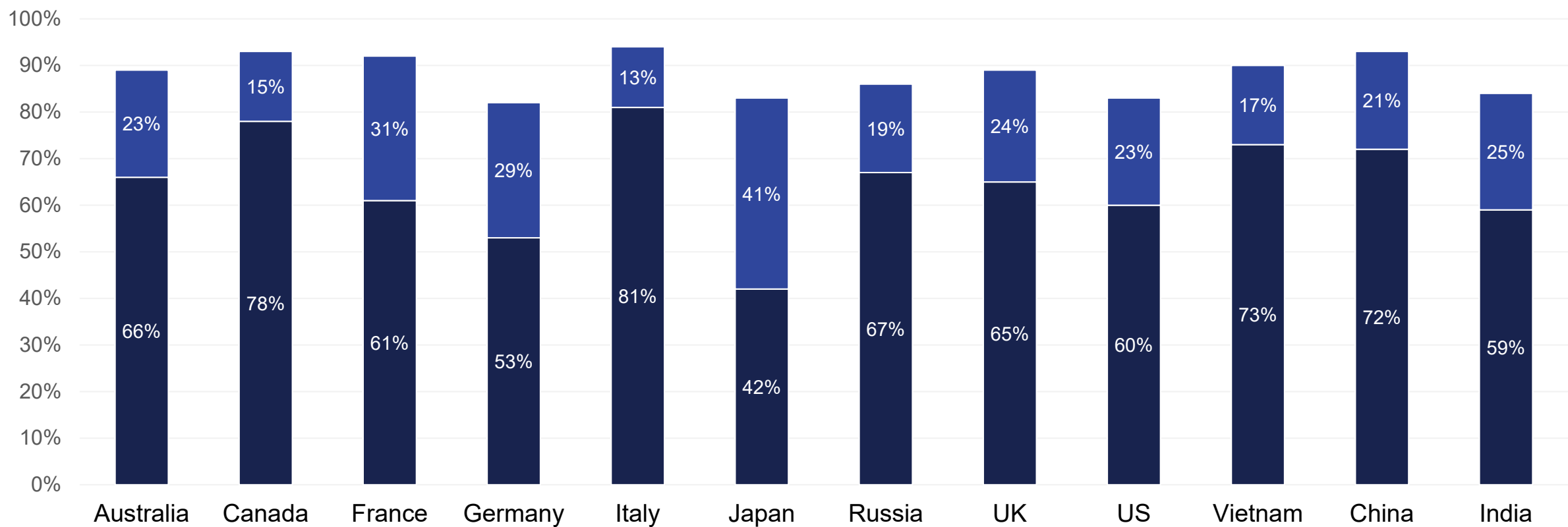
I expect things to return to normal by June



AGREEMENT WITH IDEA OF SELF-QUARANTINE ACROSS COUNTRIES, ALTHOUGH INTENSITY VARIES.

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

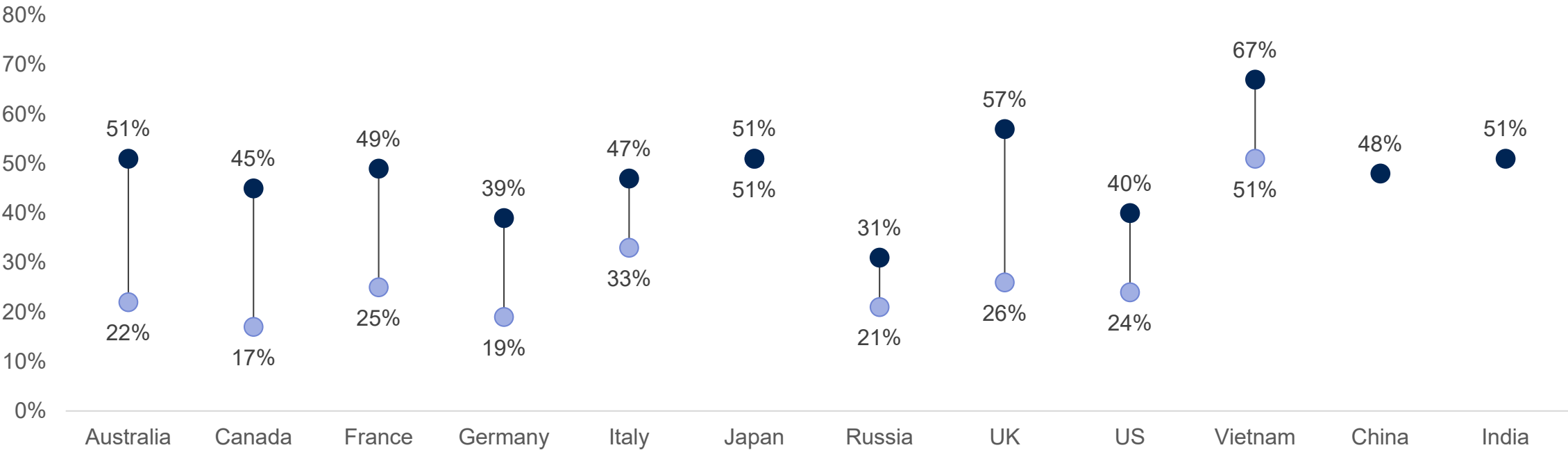
Strongly agree Somewhat agree



PEOPLE BELIEVE OTHERS CLOSE TO THEM WILL BE INFECTED, HAS RISEN SIGNIFICANTLY IN MOST COUNTRIES.

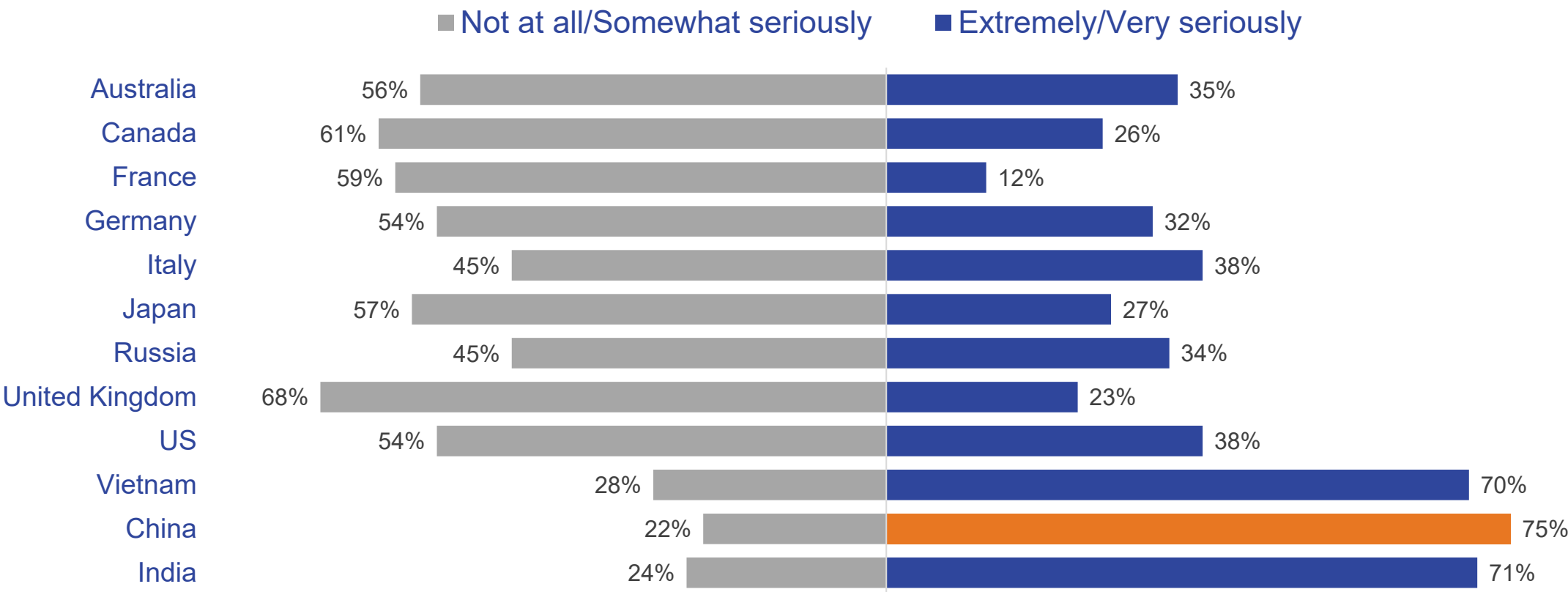
% Very + Somewhat Likely

● Feb 28 - 29 ● Mar 12 - 14



How likely or unlikely do you think each of the following are to occur as a result of the Coronavirus or COVID-19?
Someone close to me will be infected by the virus.

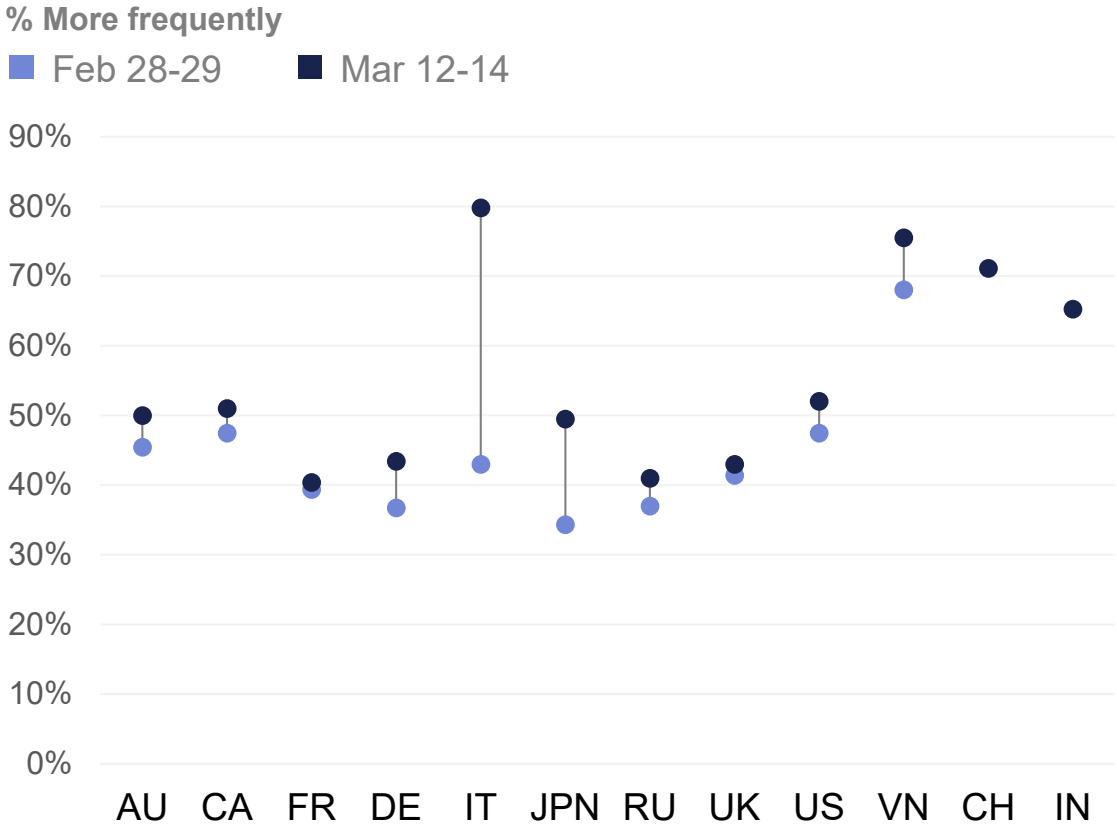
CHINA NOTABLE IN PERCEPTION OF PERSONAL RISK ASSOCIATED WITH VIRUS.



If you were infected by coronavirus or Covid-19, how seriously do you think it would affect your health?

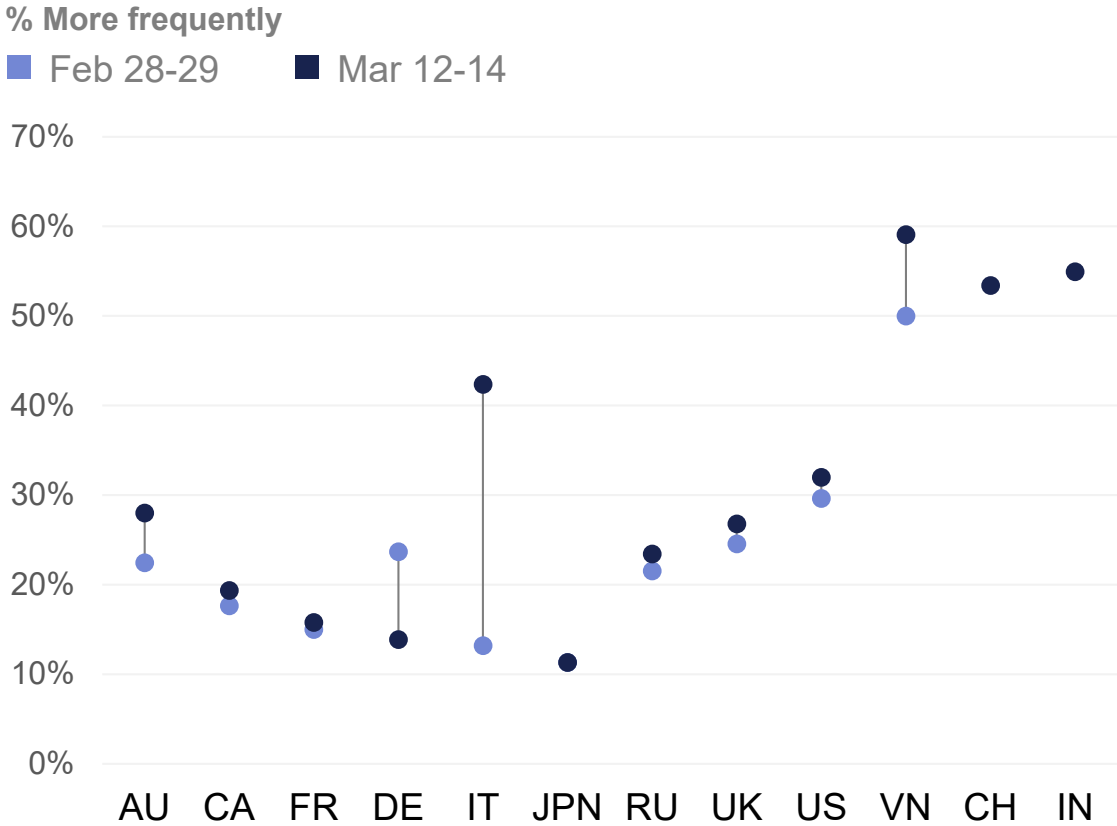
PEOPLE STARTING TO SPEND MORE TIME AT HOME, BUT SHOPPING BEHAVIOURS HAVE NOT YET SHIFTED EXCEPT – OF COURSE – IN ITALY.

Spending Time at Home
(among those who do this activity)



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Have food or groceries delivered online
(among those who do this activity)

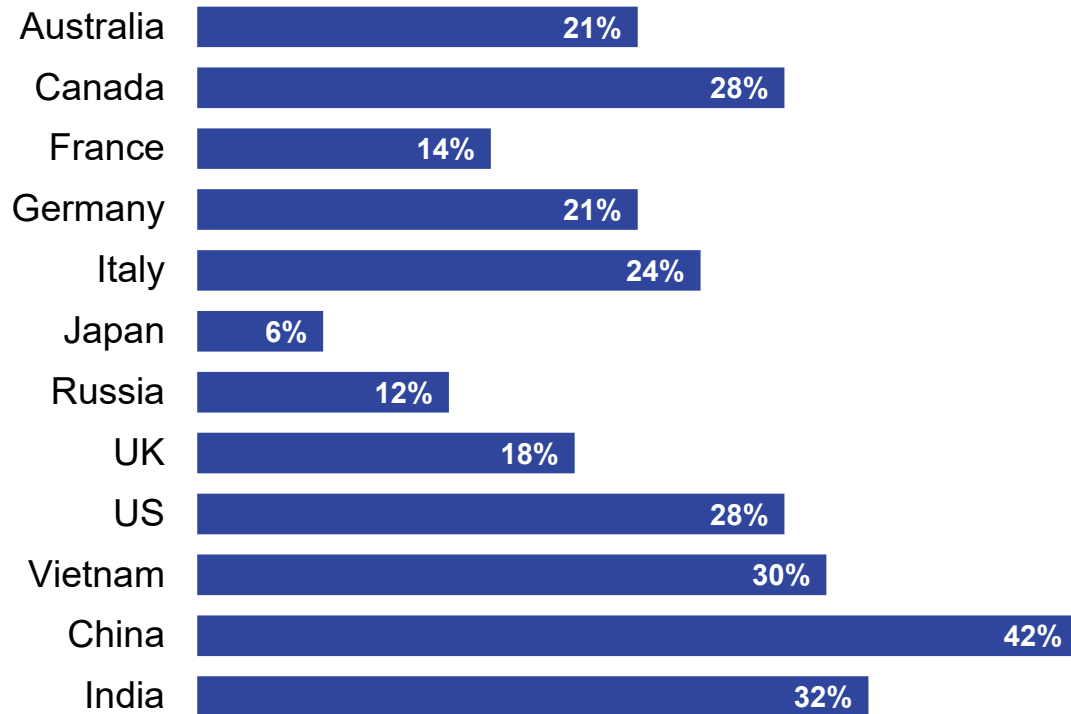


Thinking now about your day to day activities, would you say you are doing each of the following more frequently or less frequently compared to one month ago?

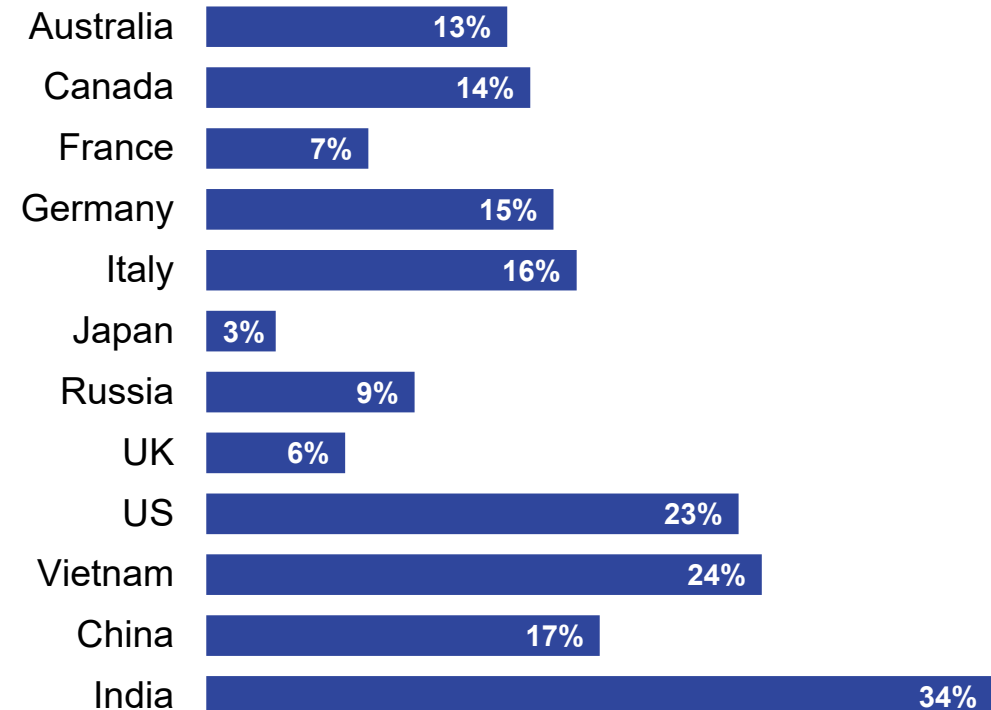
WHILE FREQUENTLY DISCUSSED, STOCKPILING BEHAVIOURS STILL LIMITED IN EUROPE AND NORTH AMERICA AND HIGHER IN ASIA.

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

Stocking Up on Food



Stocking Up on Water



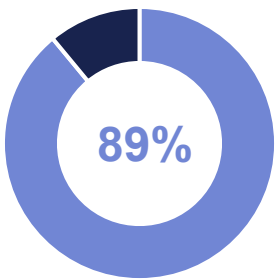
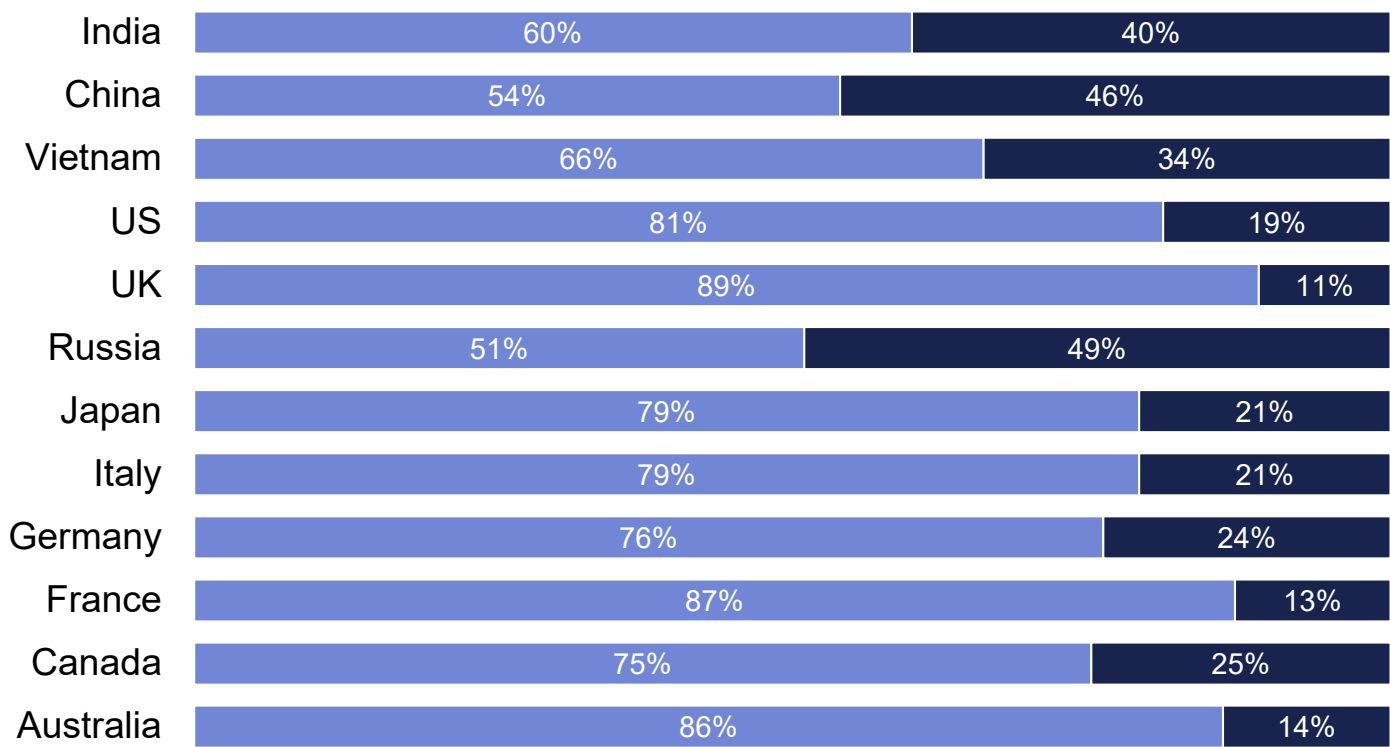
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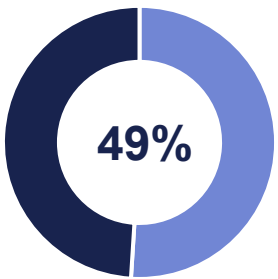
STOCKPILING IS SEEN AS MORE OF AN ISSUE THAN A DISRUPTION IN THE SUPPLY CHAIN.

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



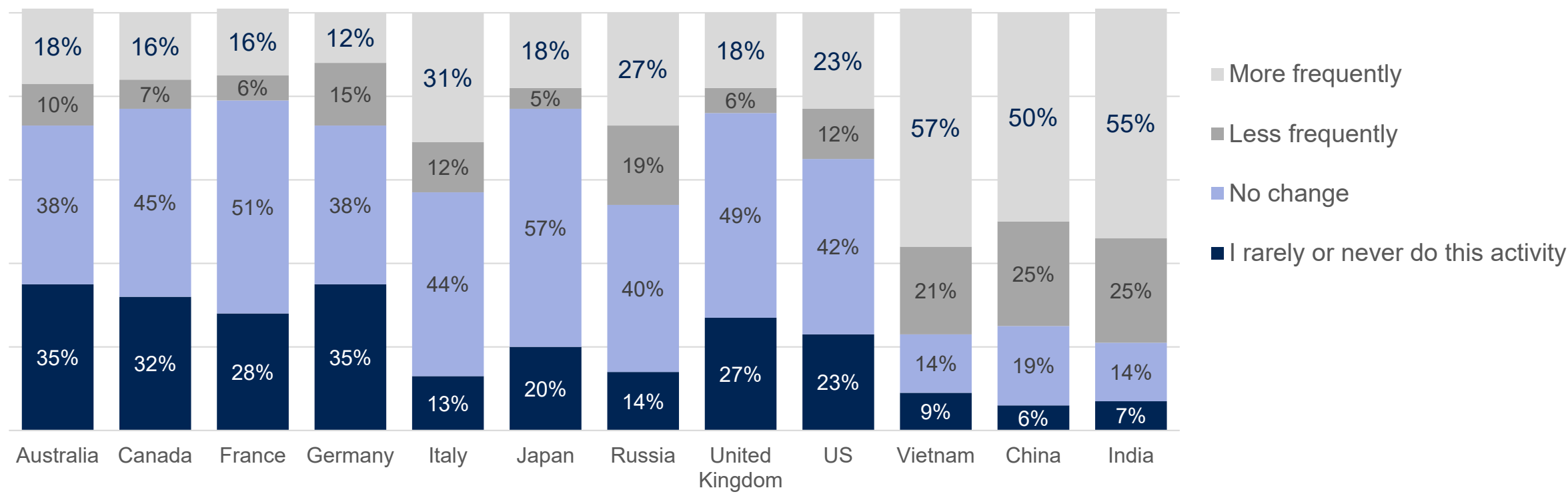
The UK most likely to say stockpiling is to blame for shortages.



Russia most likely to blame the supply chain for shortages.

A REPORTED RISE IN E-COMMERCE IN CHINA AND ITALY IN PARTICULAR – SIGN OF THINGS TO COME IN OTHER COUNTRIES?

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

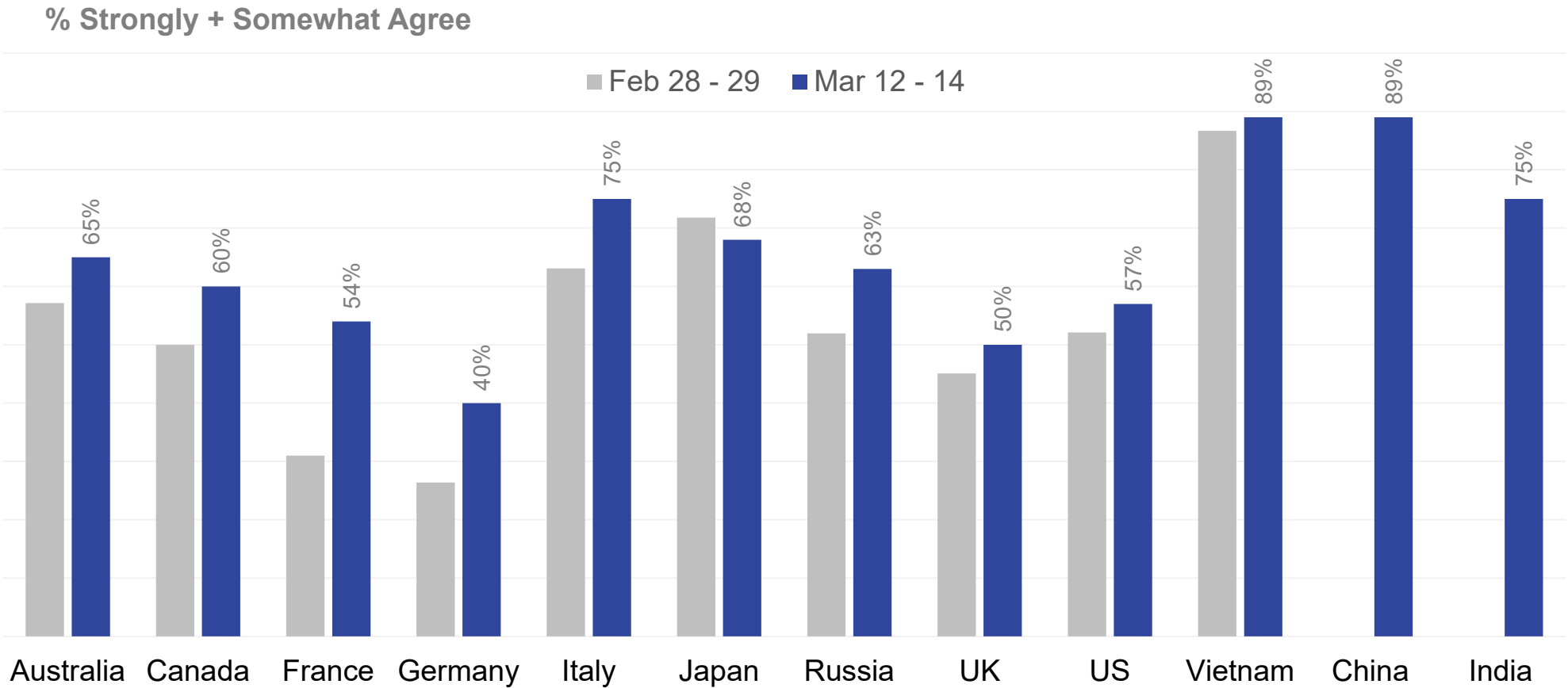


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What about each of the following, would you say are doing each of the following more frequently or less frequently compared to one month ago?



MAJORITIES IN MOST COUNTRIES FORESEE A PERSONAL FINANCIAL IMPACT.



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 12th to 14th, 2020 on the Global Advisor online platform among 10,000 adults aged 18-74 in Canada and the United States and 16-74 in Australia, China, France, Germany, Italy, India, Japan, Russia, Vietnam and the United Kingdom. Where available, tracking results from Wave 3, conducted February 28-29, February 14-15, and February 7-9 are presented. Sample sizes are consistent wave to wave.

The sample consists of approximately 1,000 individuals in each country. The samples in Australia, Canada, France, Germany, Italy, Japan, the U.K. and the U.S. can be taken as representative of these countries' general adult population under the age of 75. The sample in China, India, Russia and Vietnam is more urban, more educated and/or more affluent than the general population and should be viewed as reflecting the views of the more "connected" segment of the population. The data is weighted so that each market's sample composition best reflects the demographic profile of the adult population according to the most recent census data.

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).

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“Game Changers” – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

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GAME CHANGERS

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You act better when you are sure.

**BE
SURE.
ACT
SMARTER.**

GAME CHANGERS

