

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.



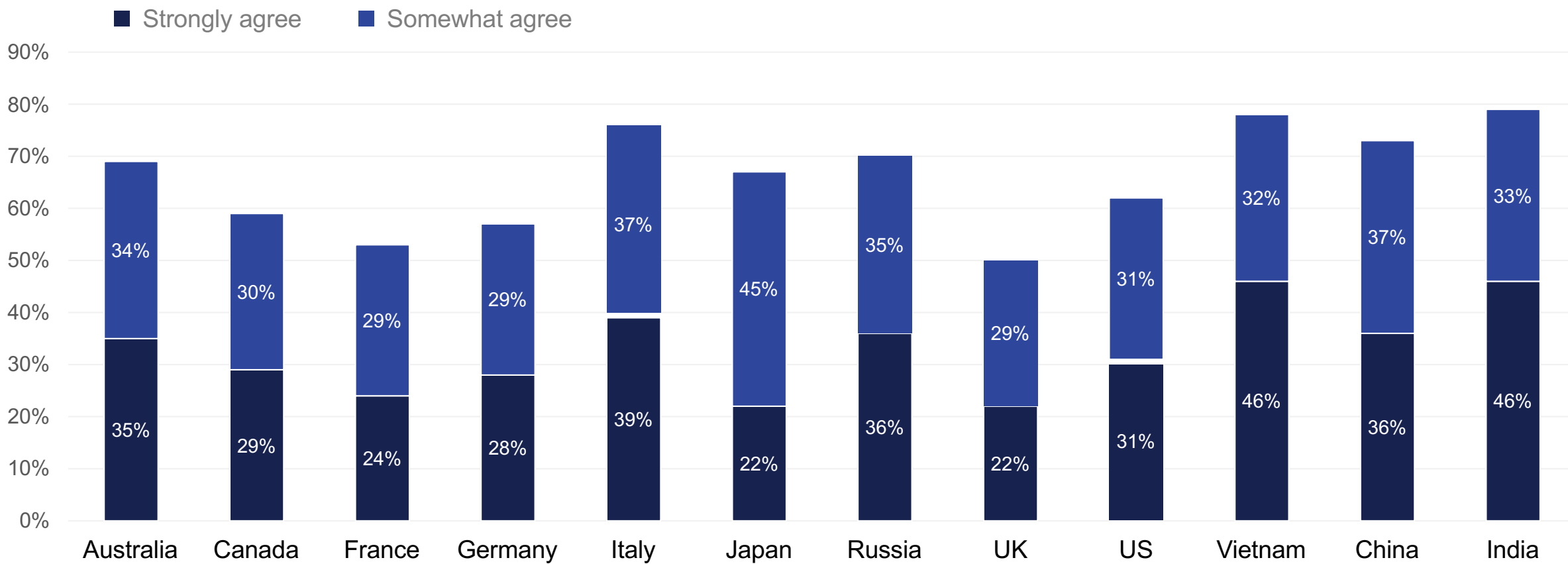
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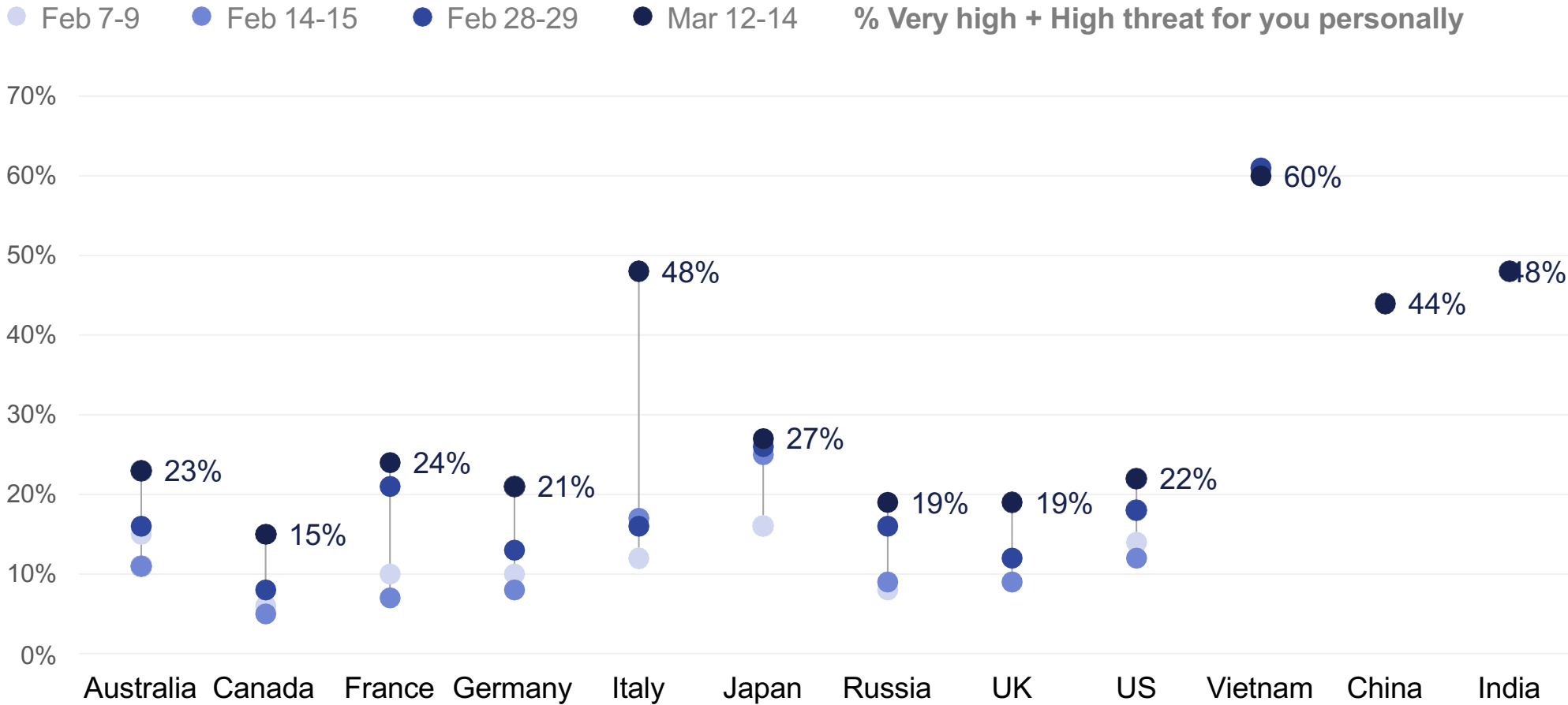
* For example: <https://www.visualcapitalist.com/infection-trajectory-flattening-the-covid19-curve/>

AGREEMENT WITH CLOSING BORDERS - SUPPORT HIGHER IN AUSTRALIA THAN IN UK, US AND GERMANY WHICH ARE HARDER HIT

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



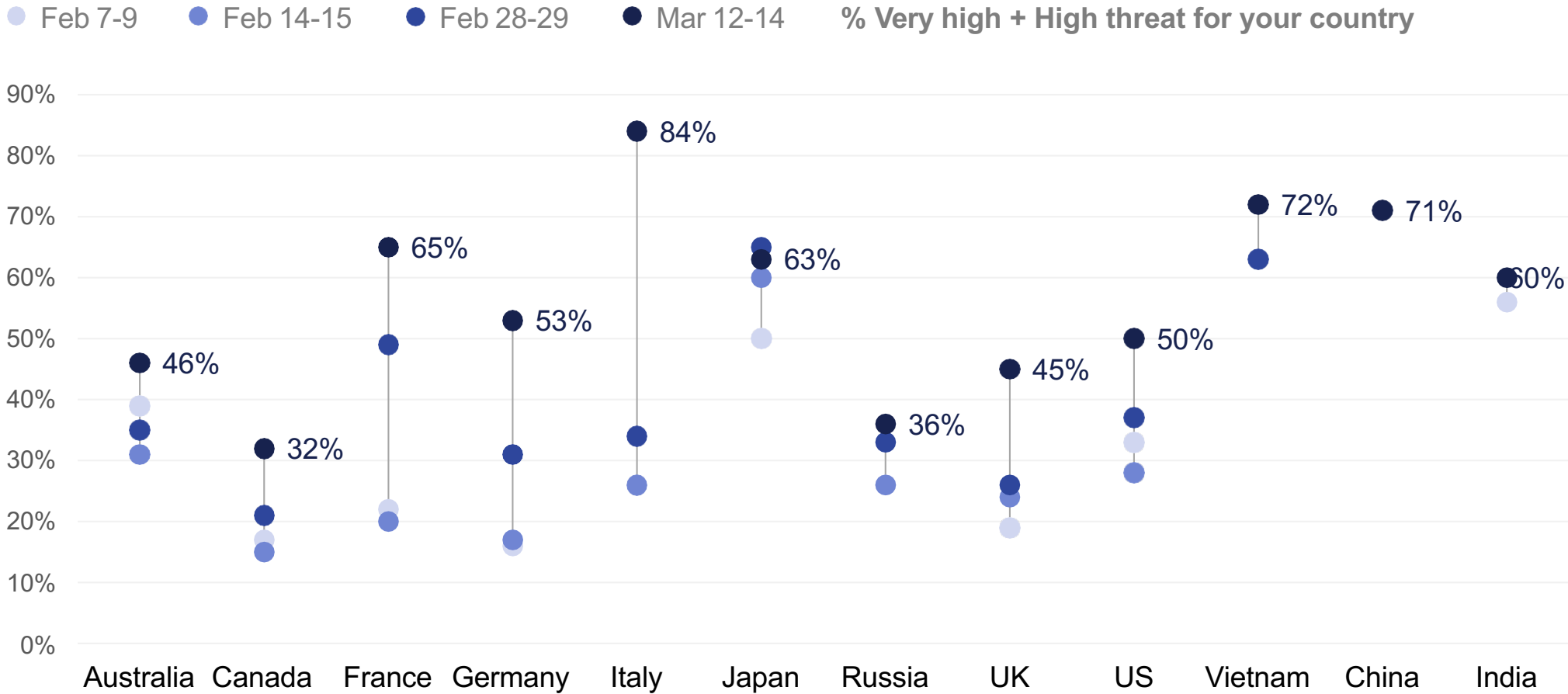
PERCEIVED PERSONAL IMPACT INCREASING, BUT NOT MOVING SIGNIFICANTLY HIGHER IN MOST COUNTRIES



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

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RISE IN PERCEPTION OF THREAT TO COUNTRY, ESPECIALLY ITALY, FRANCE AND GERMANY. SMALLER RISE IN AUSTRALIA.

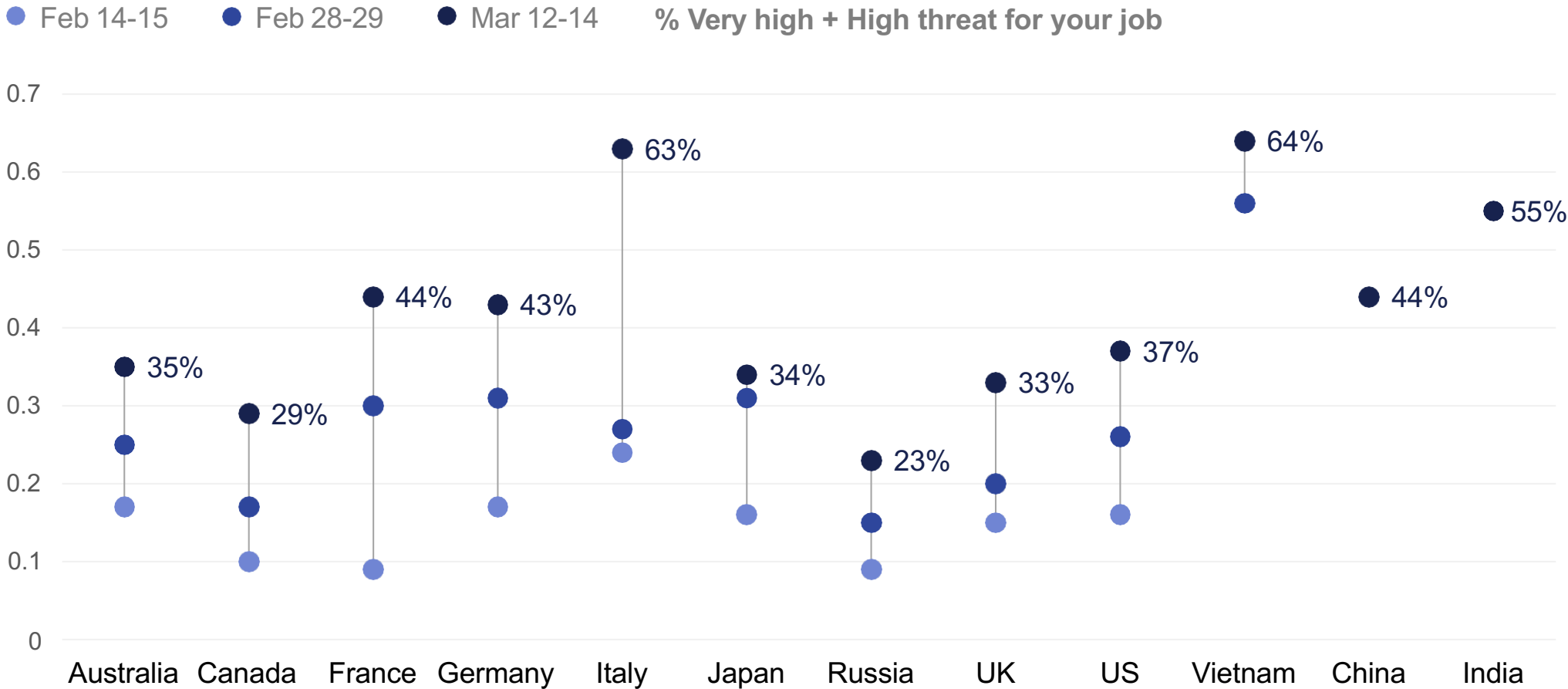


What level of threat do you think the coronavirus poses to **your country**?

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

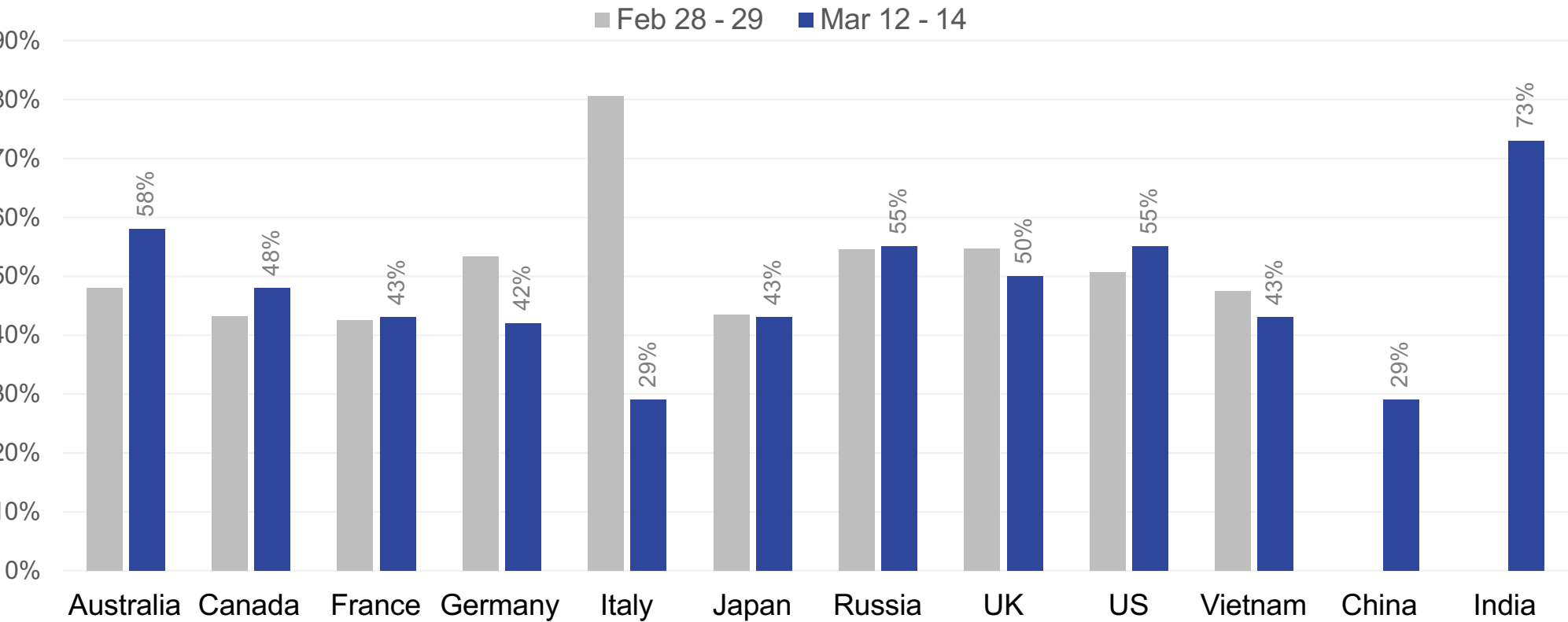


What level of threat do you think the coronavirus poses to **your job or business?**

See methodology notes for full description of the data collection specifications

ITALY THOUGHT THE MEDIA WAS EXAGGERATING, UNTIL THIS WEEK – NOW AT SIMILAR LEVELS TO CHINA. AUSTRALIANS NOW MORE LIKELY TO BELIEVE THE MEDIA IS EXAGGERATED.

% Strongly + Somewhat Agree



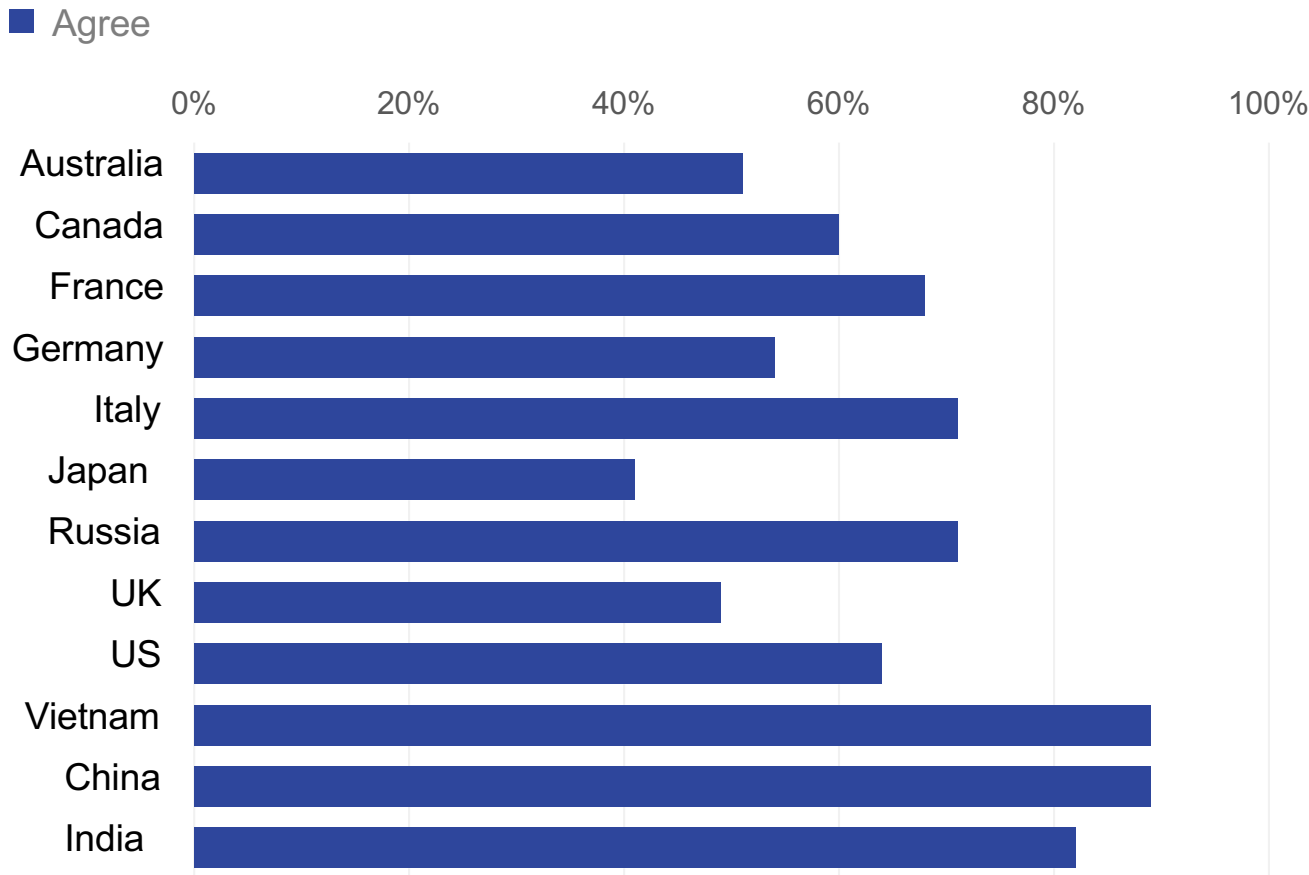
The media has exaggerated the extent of the coronavirus outbreak?

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

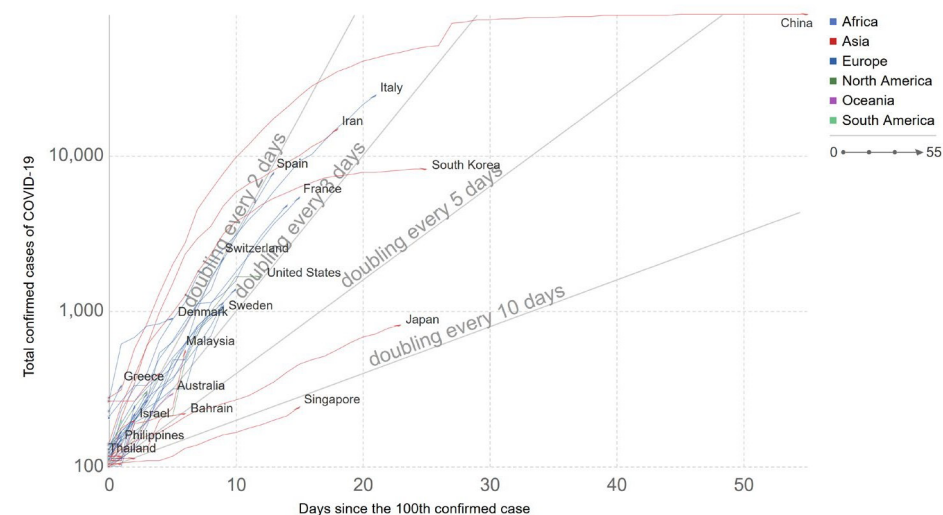


MAJORITIES IN MOST COUNTRIES ARE OPTIMISTIC THAT THINGS WILL RETURN TO NORMAL BY JUNE, DESPITE TRAJECTORIES SHOWING THE OPPOSITE



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.



Source: WHO COVID-2019 Situation Reports

OurWorldInData.org/coronavirus • CC BY

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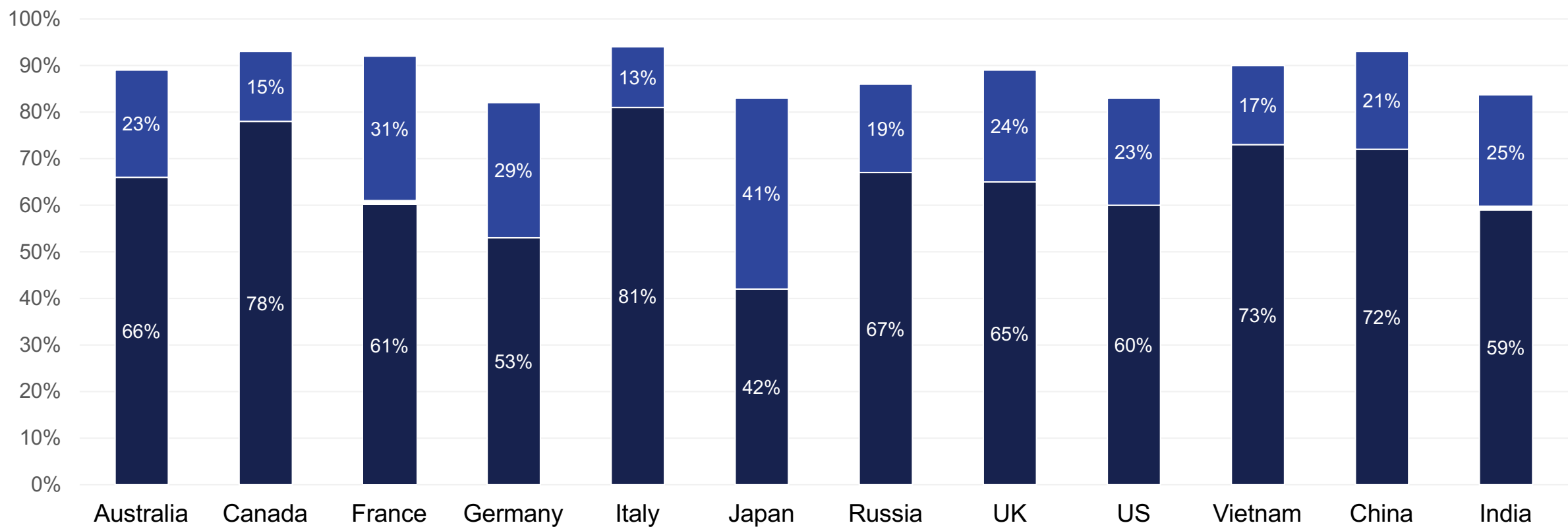
I expect things to return to normal by June



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.

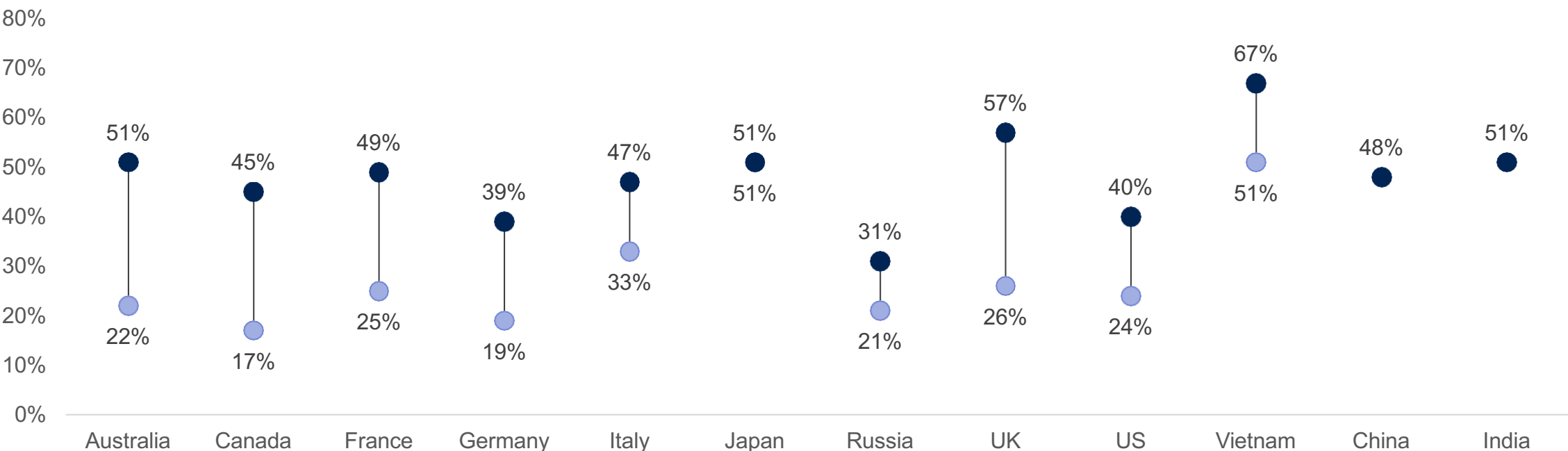
■ Strongly agree ■ Somewhat agree



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

% Very + Somewhat Likely

● Feb 28 - 29 ● Mar 12 - 14

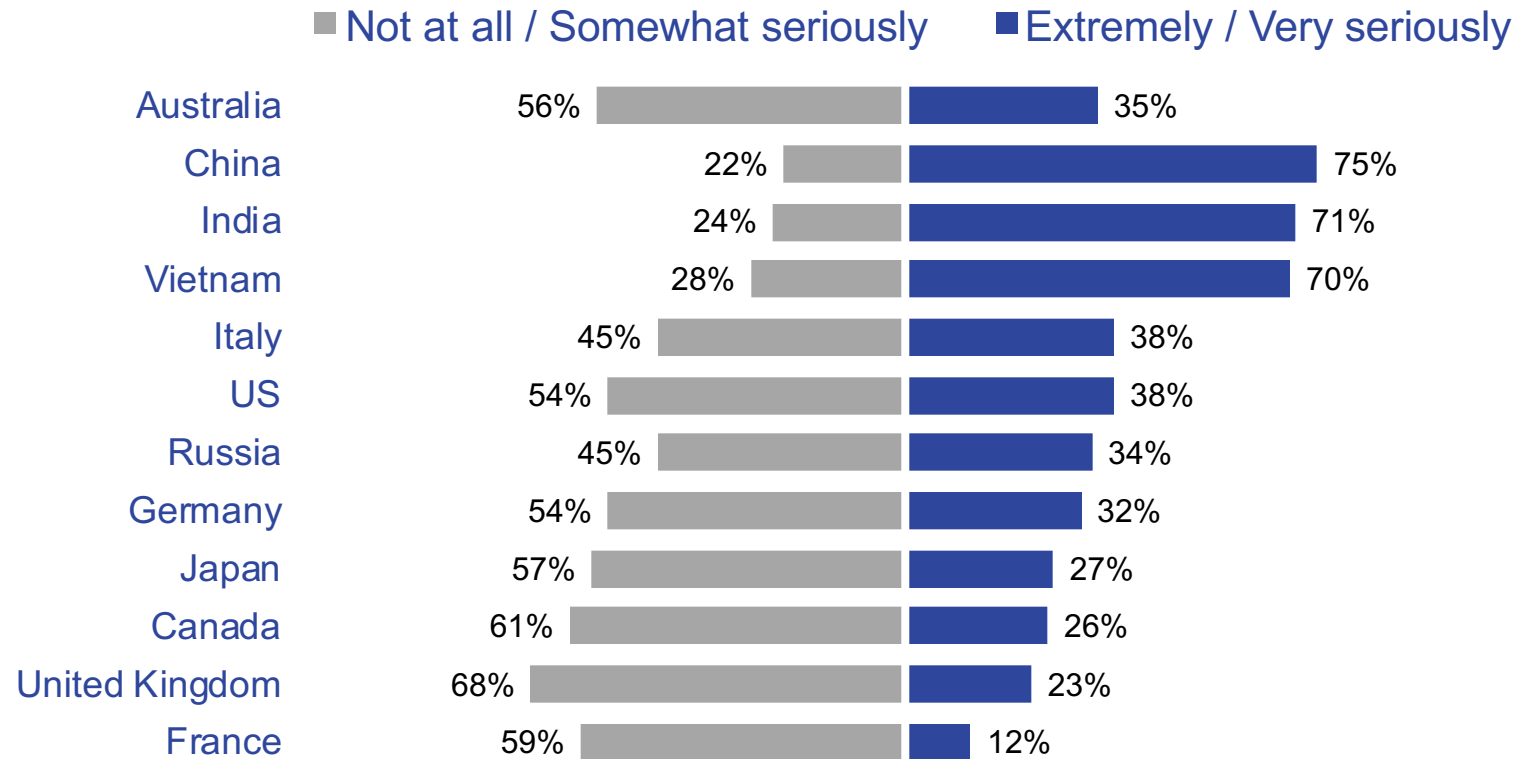


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How likely or unlikely do you think each of the following are to occur as a result of the Coronavirus or COVID-19?
Someone close to me will be infected by the virus.

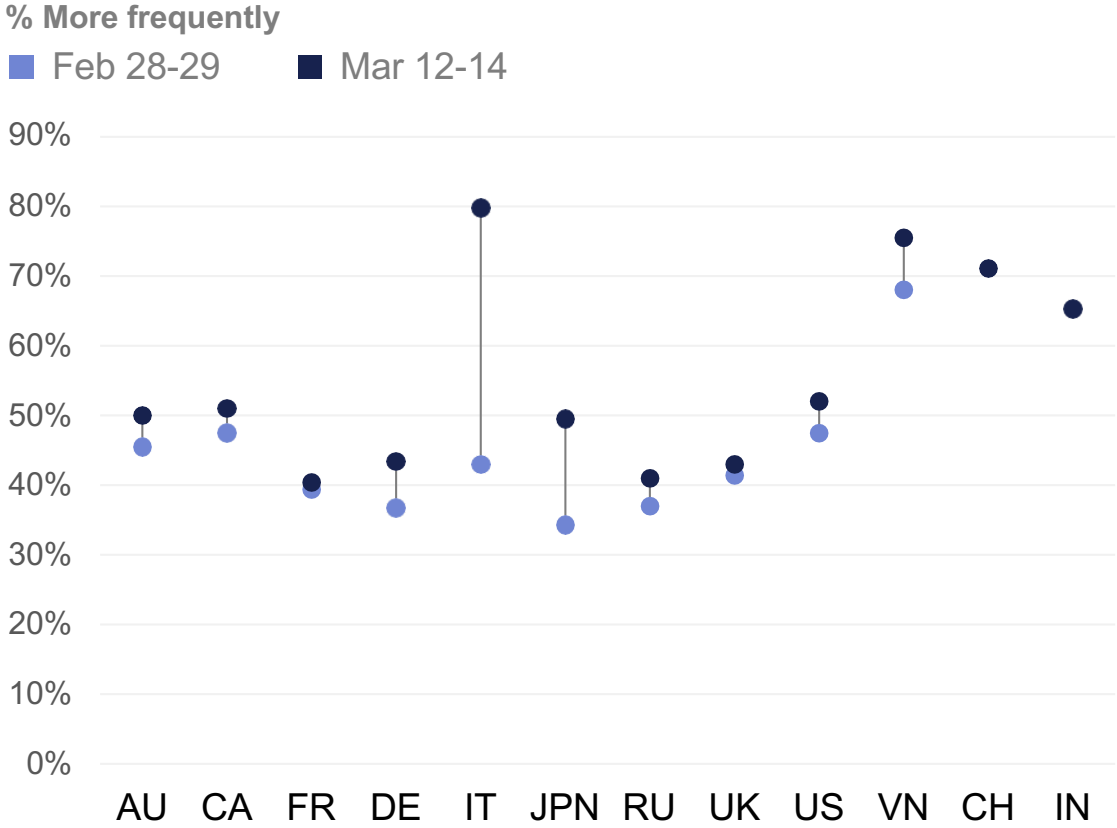


MOST AUSTRALIANS DON'T BELIEVE THAT THE PERSONAL HEALTH IMPACTS WILL BE SERIOUS. IN CHINA IT IS MUCH HIGHER.



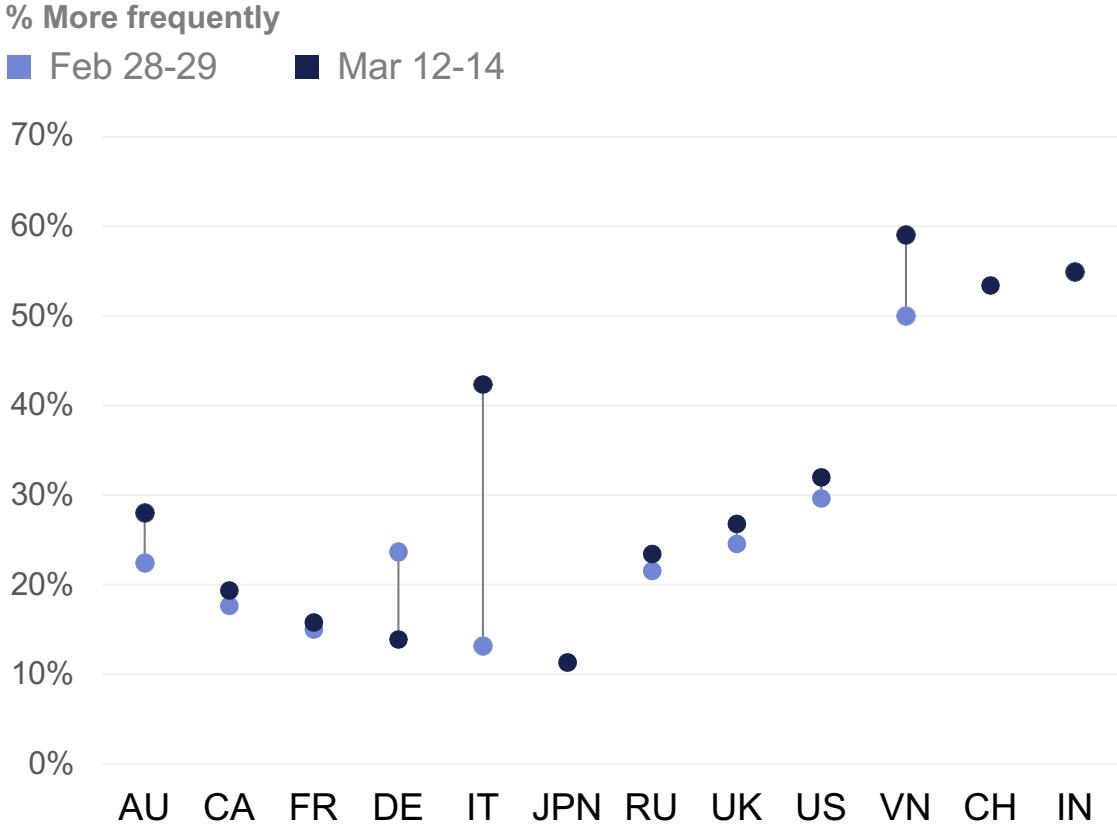
PEOPLE STARTING TO SPEND MORE TIME AT HOME, BUT SHOPPING BEHAVIOURS HAVE NOT YET SHIFTED EXCEPT – OF COURSE – IN ITALY.

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)



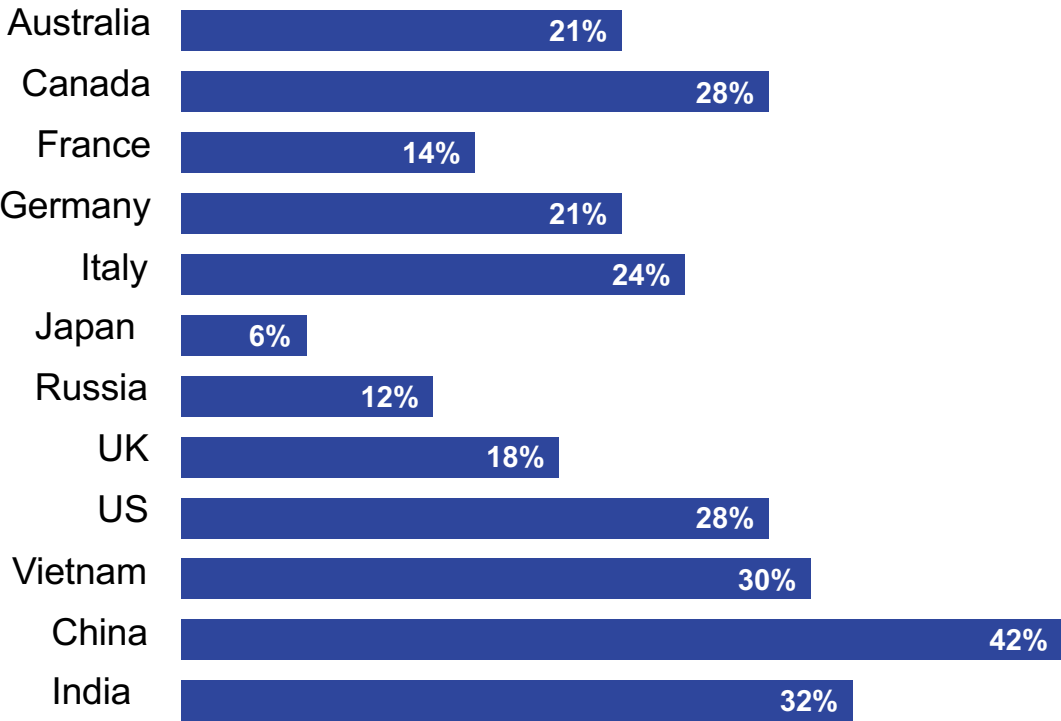
Thinking now about your day to day activities, would you say you are doing each of the following more frequently or less frequently compared to one month ago?



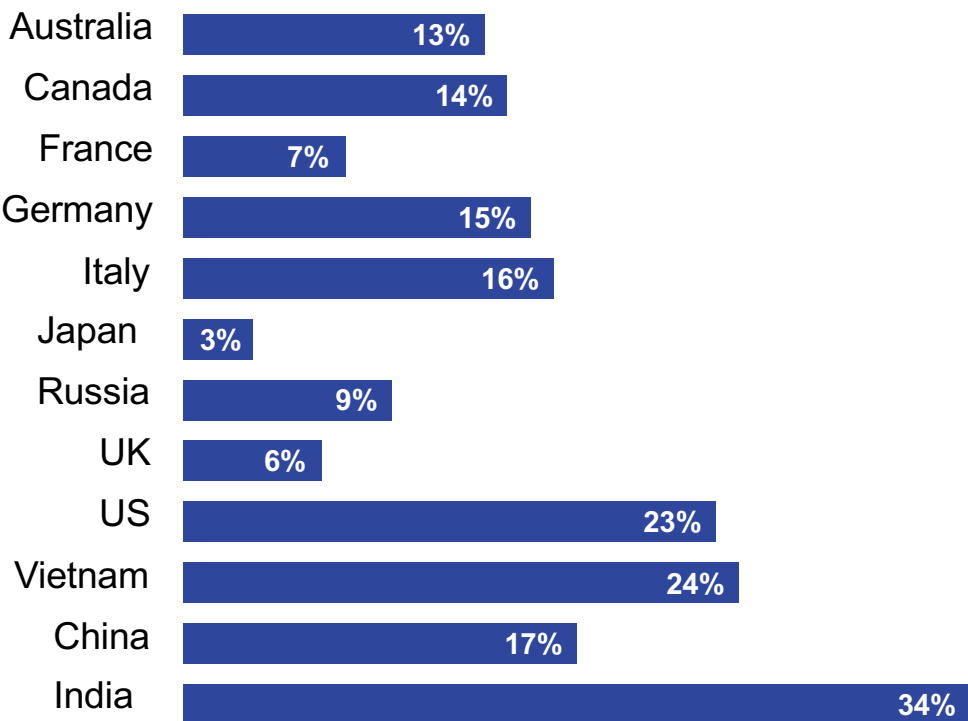
STOCKPILING BEHAVIOURS IN AUSTRALIA ARE MORE IN LINE WITH EUROPE THAN HIGHER RATES IN NORTH AMERICA AND ASIA.

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

Stocking Up on Food



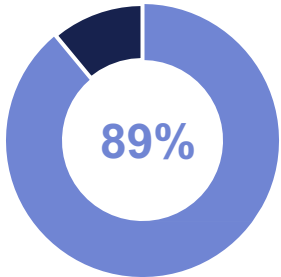
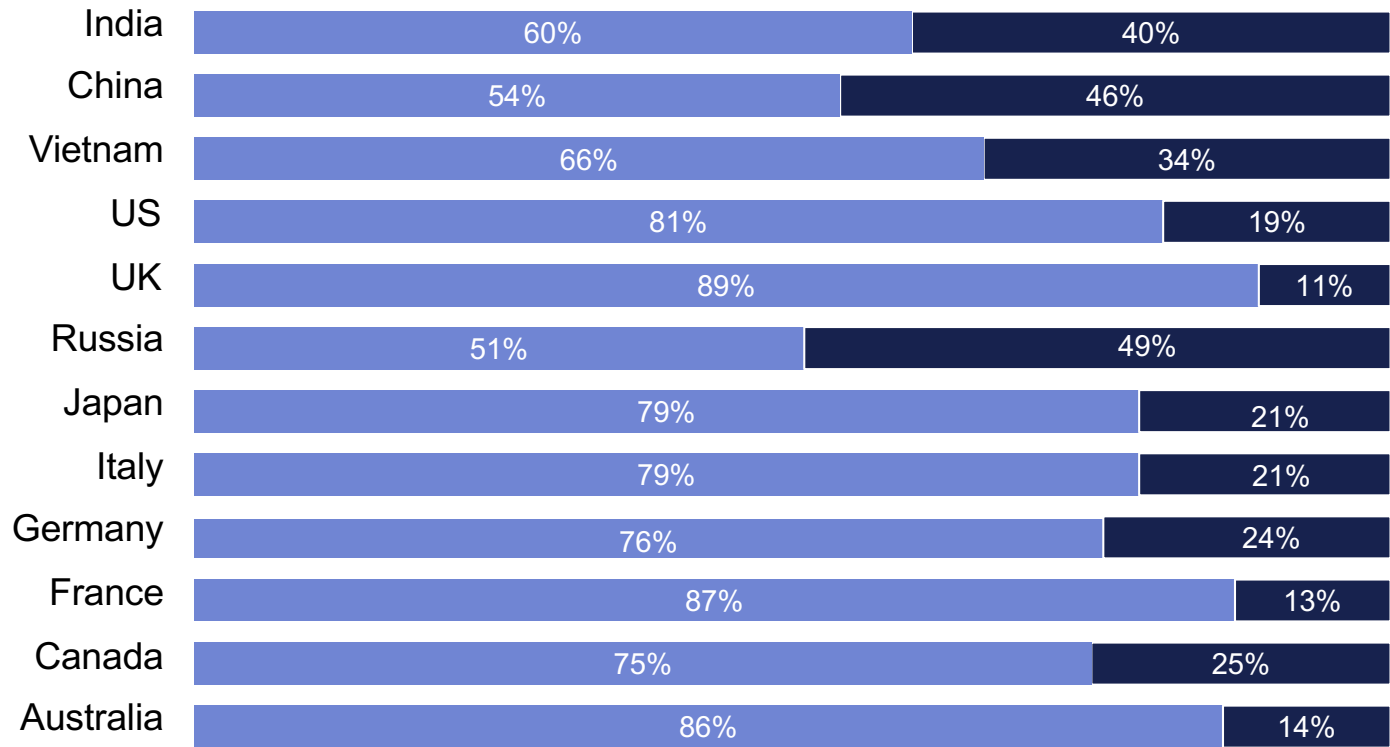
Stocking Up on Water



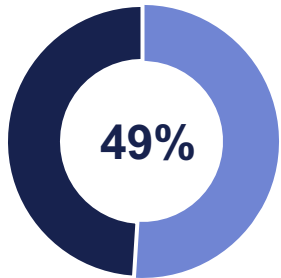
STOCKPILING IS SEEN AS MORE OF AN ISSUE THAN A DISRUPTION IN THE SUPPLY CHAIN, ESPECIALLY IN AUSTRALIA, UK AND FRANCE.

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 ■ A disruption in the supply and distribution of food and other products

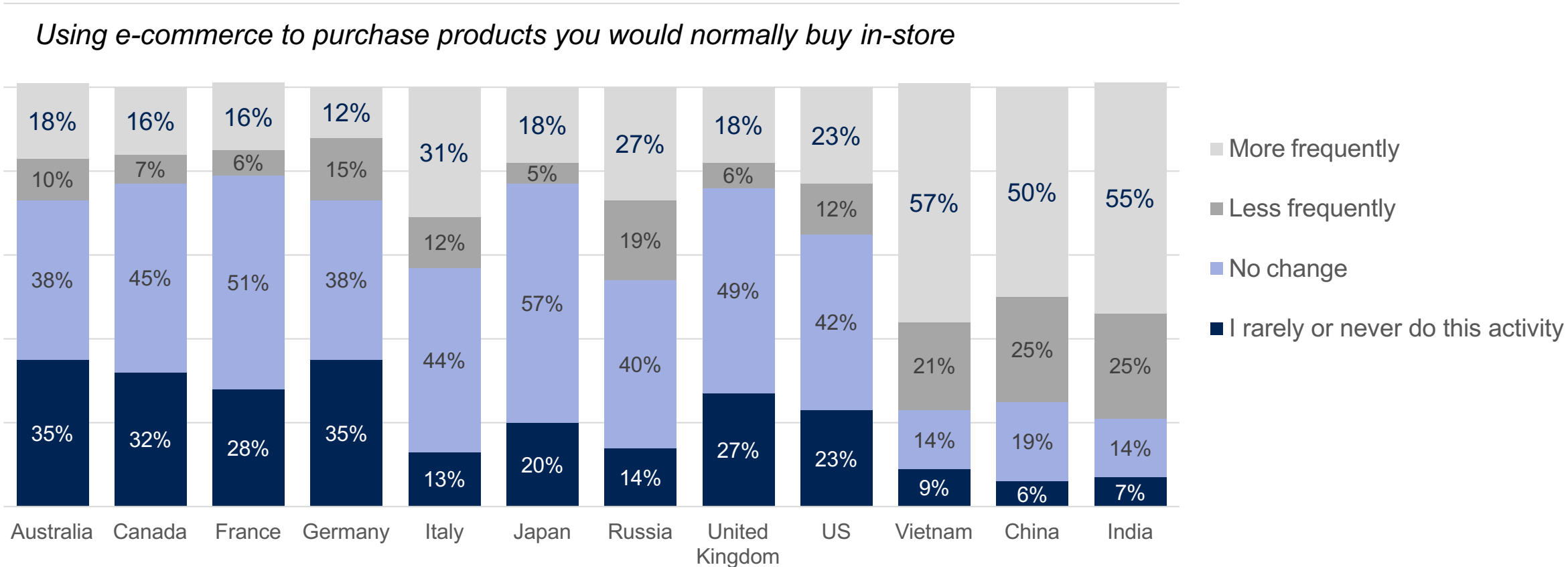


The UK most likely to say stockpiling is to blame for shortages.



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?

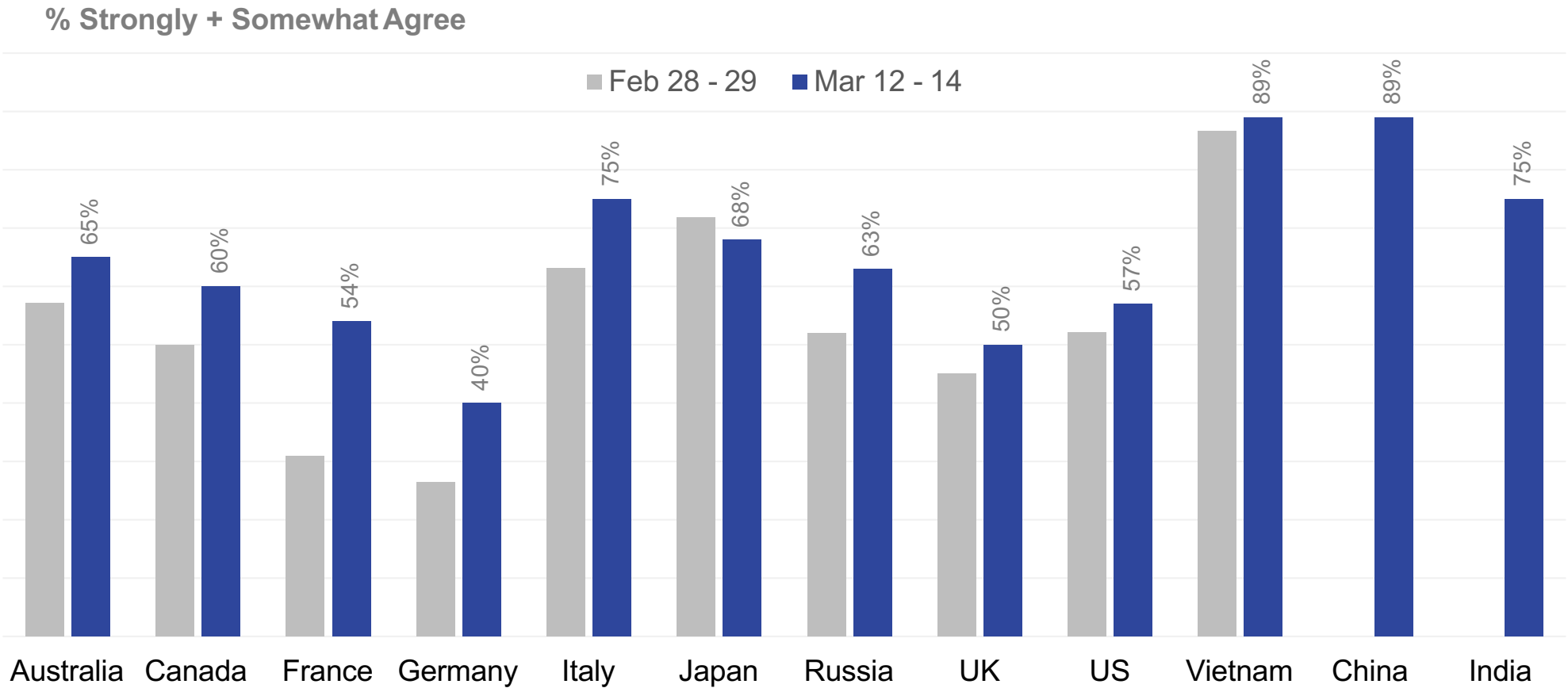


What about each of the following, would you say are doing each of the following more frequently or less frequently compared to one month ago?

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MAJORITIES IN MOST COUNTRIES FORESEE A PERSONAL FINANCIAL IMPACT. THE INCREASE IN AUSTRALIA SINCE W3 IS SMALL.



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).

COVID-19 SYNDICATED STUDY AND SOCIAL MEDIA MONITOR

- This report details the publicly available topline results of a larger syndicated study.
- Subscription to this syndicated study: *Coronavirus: Opinion and Reaction Report* is now available. The syndicated report covers a much larger array of questions dealing with citizens behaviours (movement, retail, health), knowledge and perceptions of the virus, perceptions on performance of those involved in managing the crisis, etc. **The questionnaire continues to evolve to ensure we are measuring the attitudes and behaviours we see emerging around the globe.**
- The study began with fortnightly tracking in early February but we have now moved into a 4 week period of weekly tracking (this report being the first of the weekly waves).
- Ipsos has also instigated a social media monitor which can be subscribed to: Coronavirus Social Media Analysis and Reporting. Please note that this monitor can **customised** to meet your needs.

If you are interested in subscribing or want to know more please reach out to your local Ipsos contact.

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Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

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

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

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This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

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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.

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SURE.
ACT
SMARTER.**

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