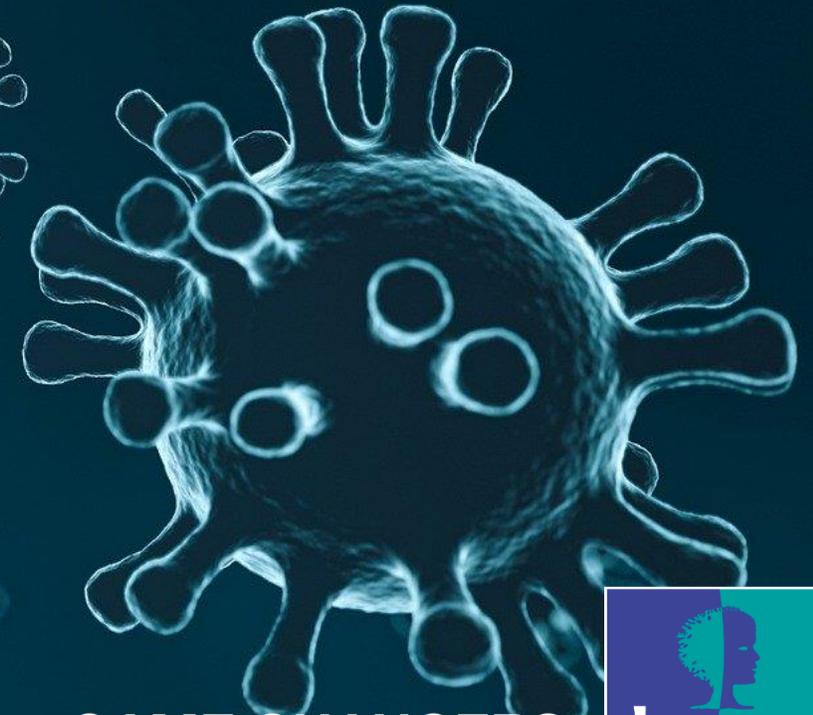


COVID-19 MENA CONSUMER SENTIMENT TRACKER

UNDERSTANDING ATTITUDES, BEHAVIORS AND FUTURE EXPECTATIONS

(KSA, UAE, Morocco, Jordan, Lebanon)

Wave 4: 10th – 13th April, 2020



GAME CHANGERS



KEY HIGHLIGHTS

1- As A Disease, The Virus Is Taken Very Seriously In The Region

- About half think the virus will be a serious threat to their health if they were infected, most noticeably in Saudi and UAE.

2- Pessimism Reaching An All Time High On Things Returning To Normal

- Coming closer to June, a witnessed unanimous decline in all countries on positivity towards things going back to normal by then. Moreover, many expect to continue wearing face masks even after the pandemic is over.

3- Financial Concerns Disturbing the MENA Region

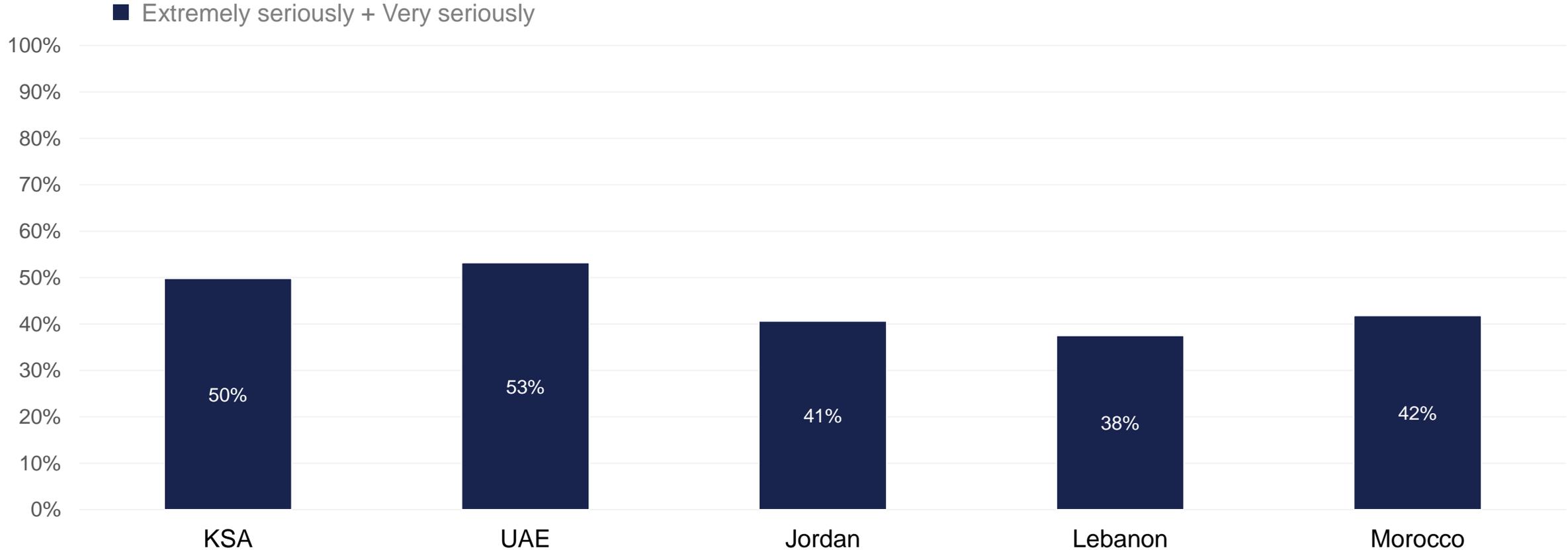
- The great majority believe the virus will leave a lasting financial burden on the global economy. Many are concerned they will soon lose their jobs and be unable to fulfill the basic needs of their families, particularly in UAE and Lebanon.

4- New Habits Bound To Emerge In The Region Following The Pandemic's End

- E-commerce is on the rise with more people doing their shopping online more frequently.

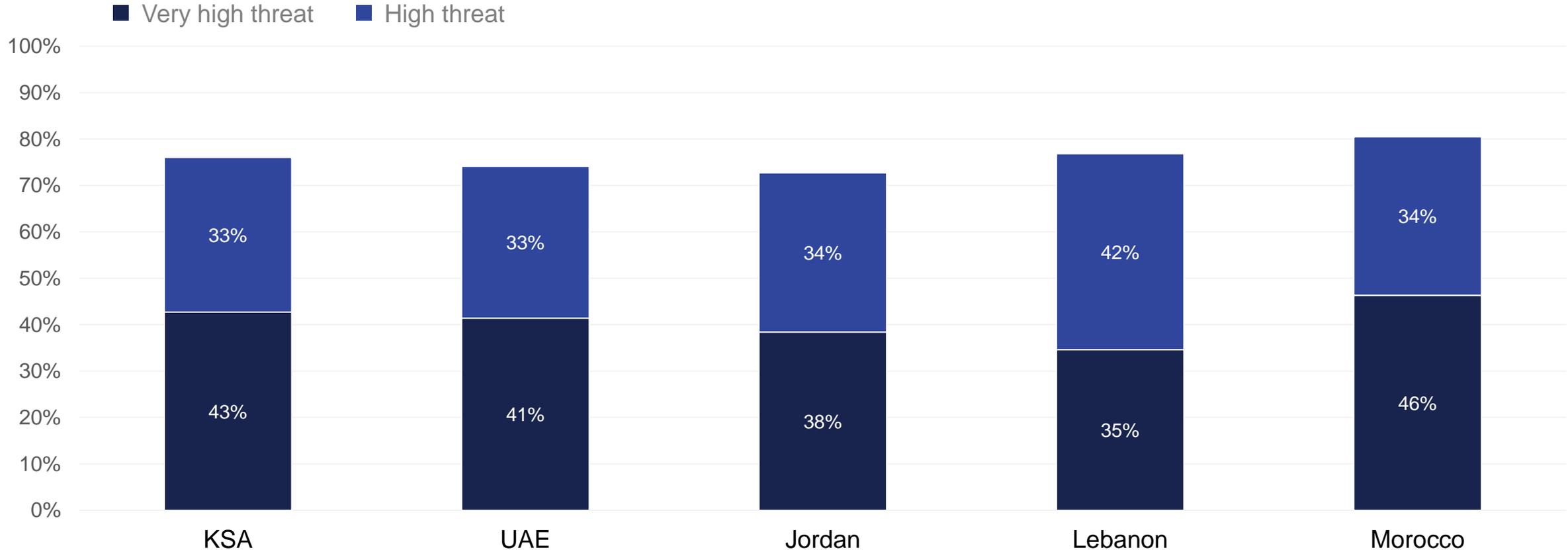
THE VIRUS'S EFFECT ON ONE'S PERSONAL HEALTH IS SEEN AS QUITE SERIOUS IN THE REGION, PARTICULARLY IN UAE AND KSA.

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



POSED THREAT TO THEIR COUNTRY SIMILAR ACROSS THE REGION, YET HIGHEST IN MOROCCO.

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

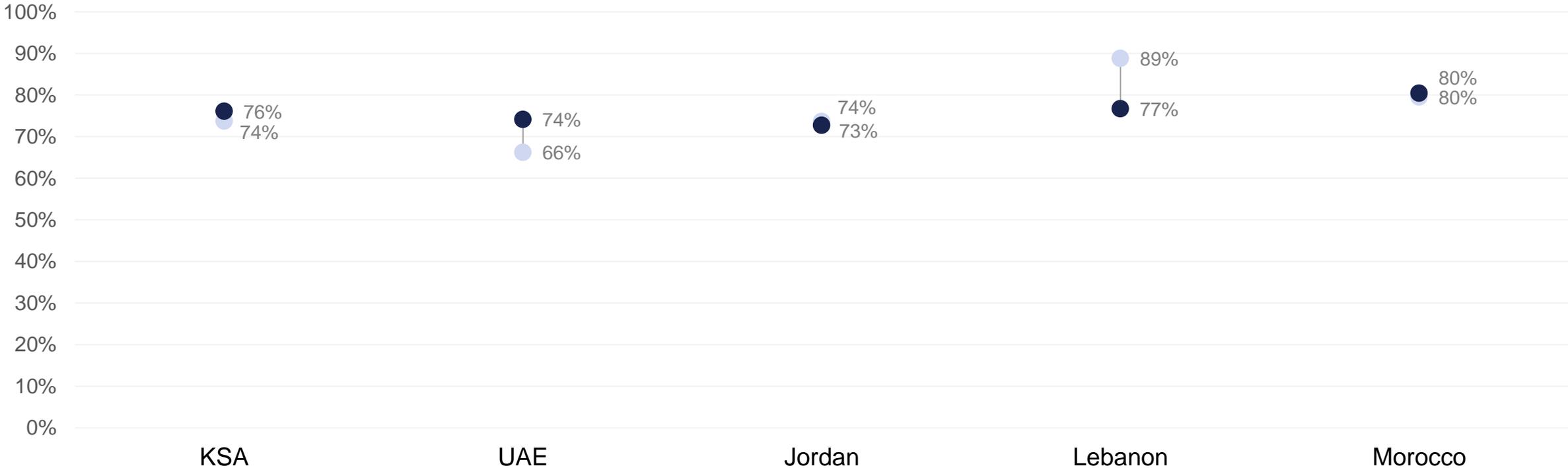


MOROCCO NOW MOST LIKELY TO PERCEIVE CORONAVIRUS AS THREAT TO COUNTRY AS LEBANON FALLS BEHIND.

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

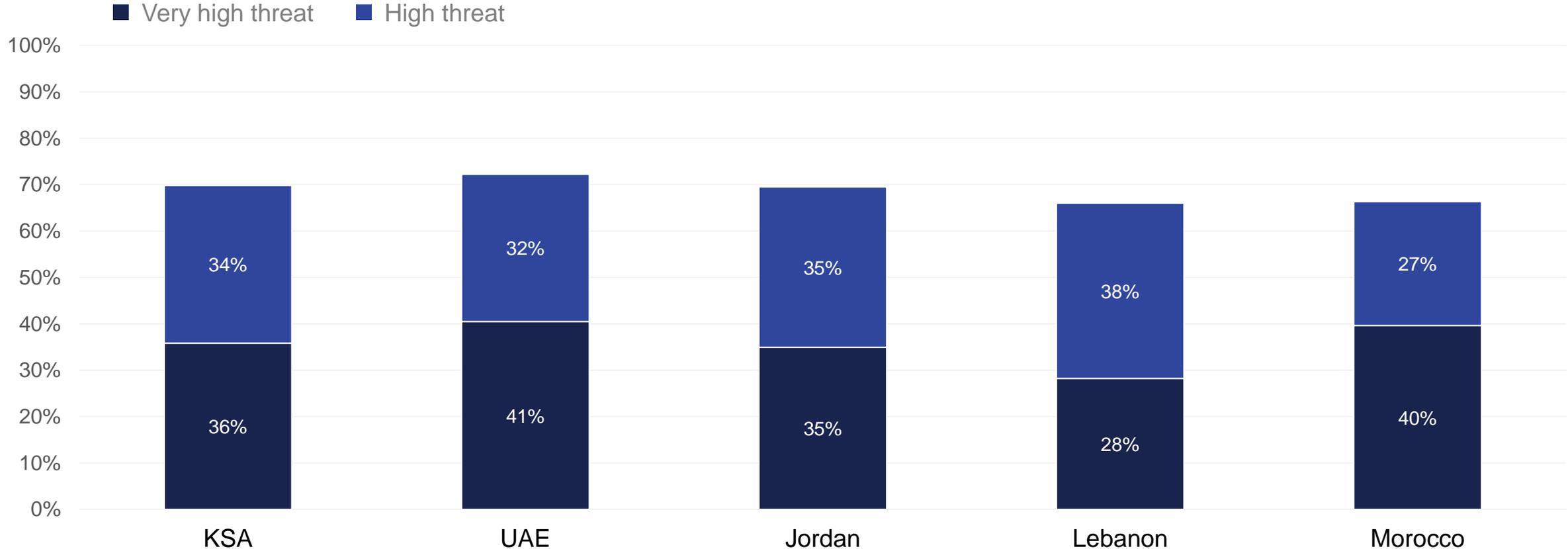
● Mar 20-23 ● Apr 10-13

% Very high + High threat for your country



SIMILAR PERCEPTION OF THREAT TO THEIR JOBS SHARED ACROSS THE REGION.

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

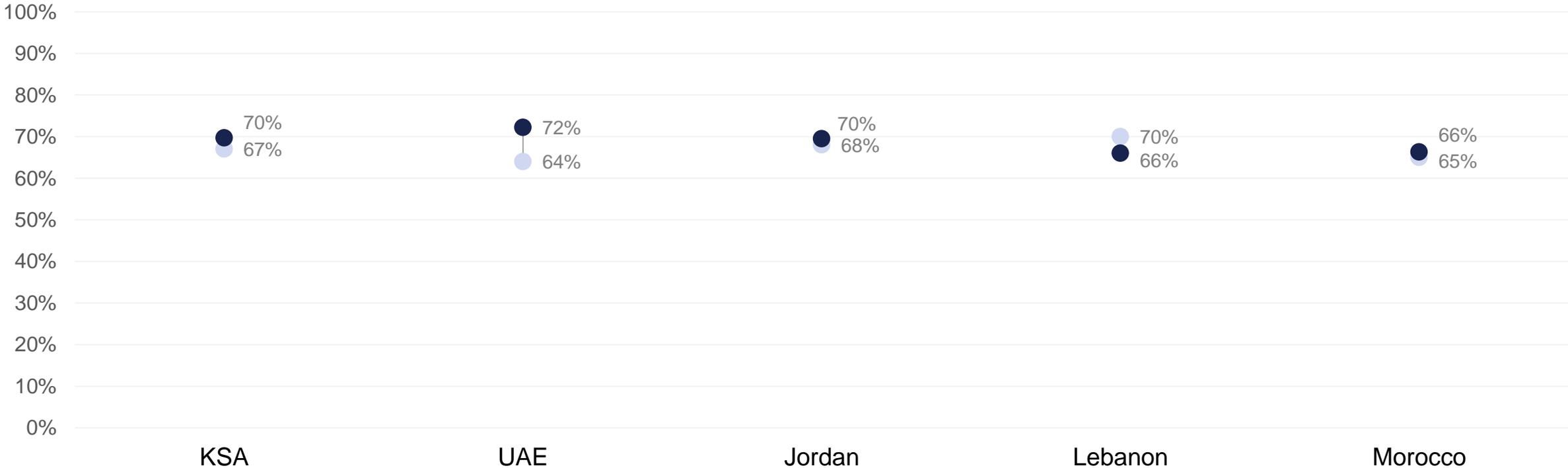


PERCEIVED THREAT TO JOB SECURITY CONTINUES TO RISE IN MENA, MOST NOTICEABLY IN UAE.

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

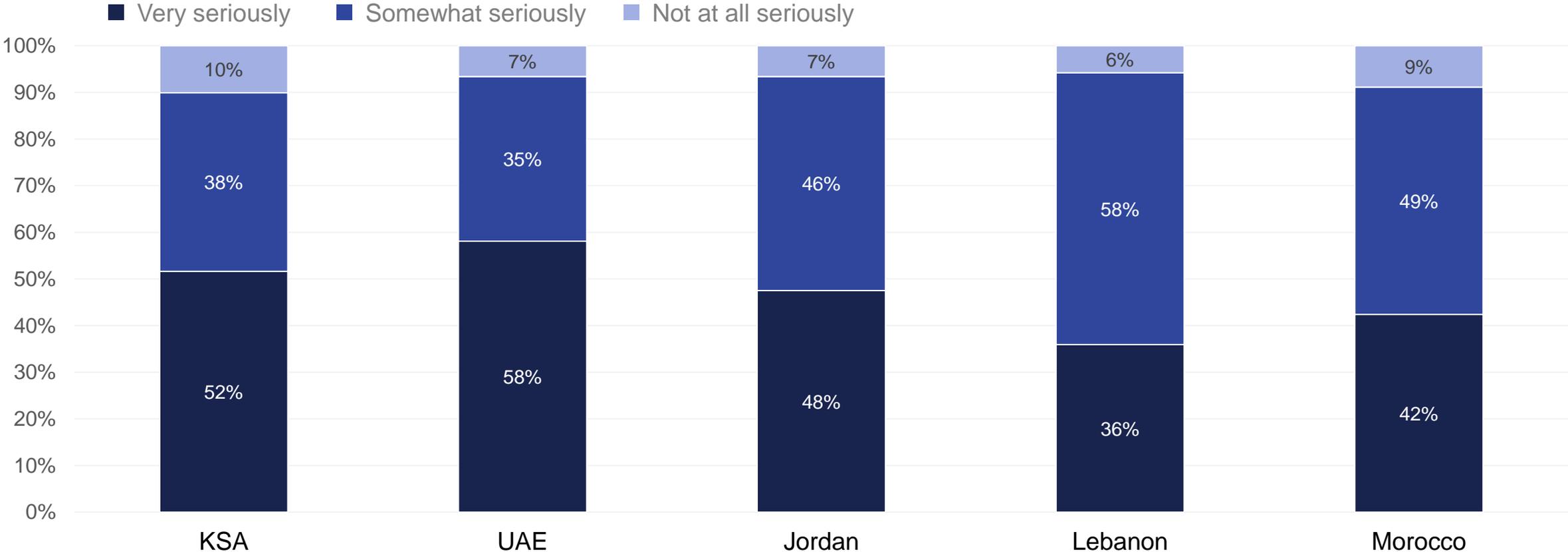
● Mar 20-23 ● Apr 10-13

% Very high + High threat for your job



THE VIRUS IS MOST SERIOUSLY TAKEN AS A THREAT IN UAE AND LEAST REGARDED IN LEBANON.

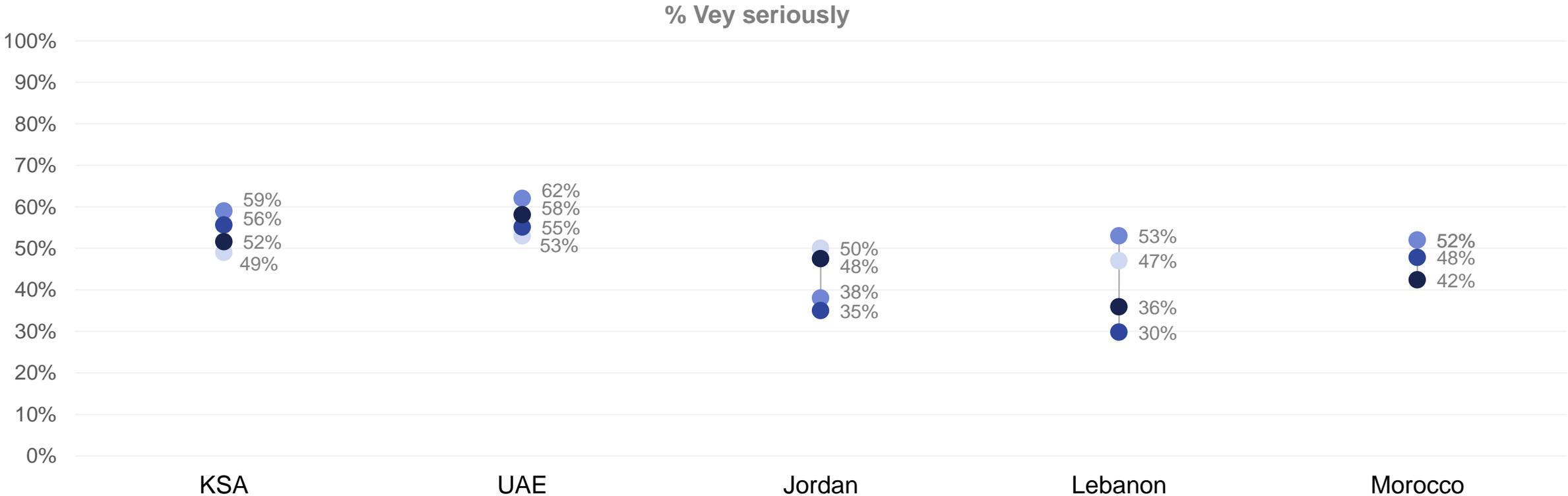
How seriously would you say people around you are taking the Coronavirus threat?



SERIOUSNESS IN JORDAN AND LEBANON RISING BACK WHILE DECLINING IN MOROCCO.

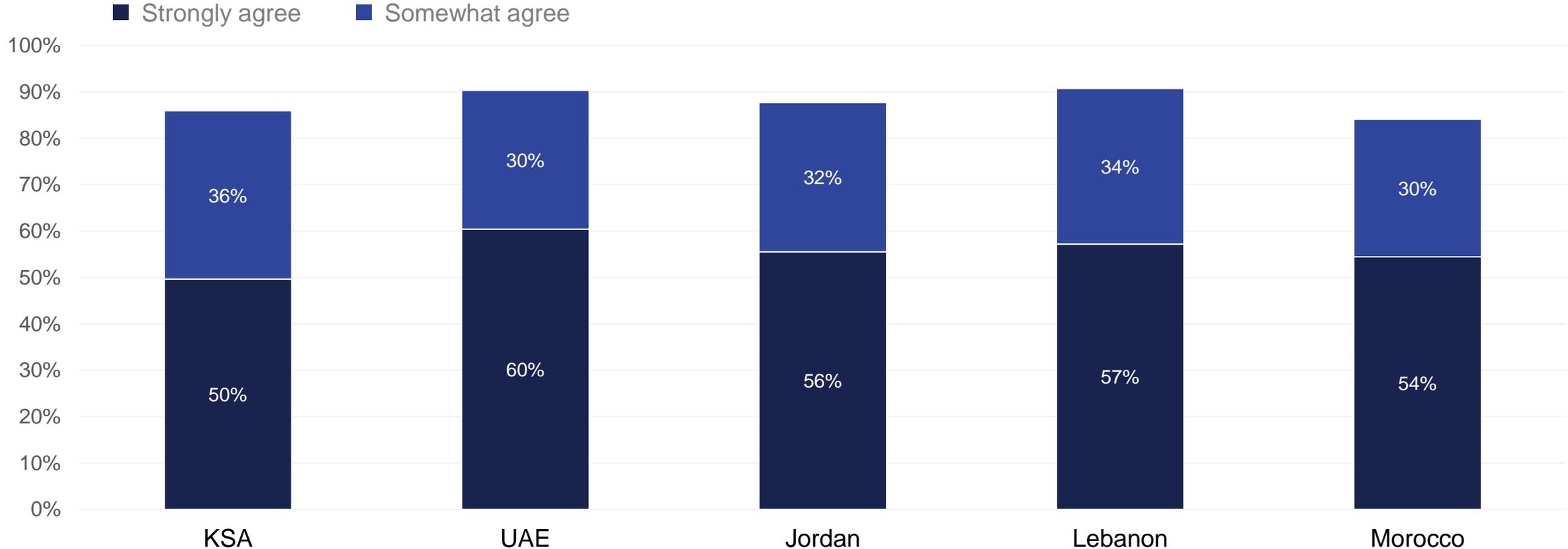
How seriously would you say people around you are taking the Coronavirus threat?

● Mar 20-23 ● Mar 27-30 ● Apr 3-6 ● Apr 10-13



MAJORITY AGREE THE VIRUS WILL HAVE A LONG LASTING IMPACT ON FINANCIAL MARKETS AND THE GLOBAL ECONOMY.

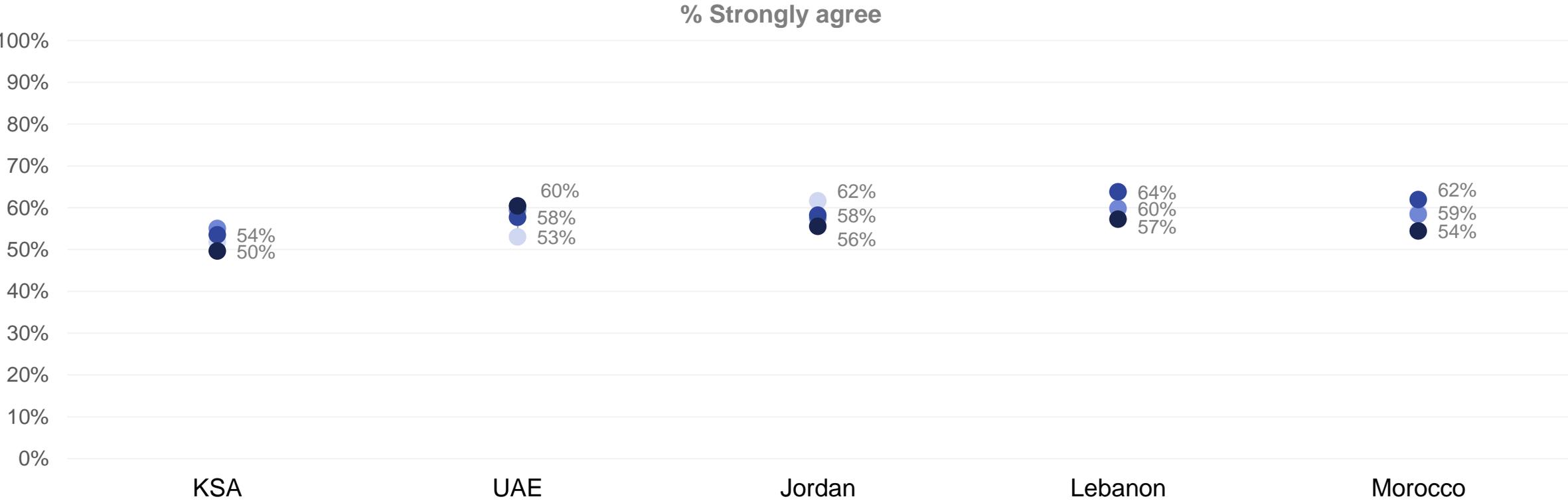
The coronavirus or COVID-19 outbreak will have an on-going impact on financial markets and the global economy



WITH THE EXCLUSION OF UAE, THE REGION'S AGREEMENT OF THE OUTBREAK HAVING AN ON-GOING FINANCIAL IMPACT IS DECLINING.

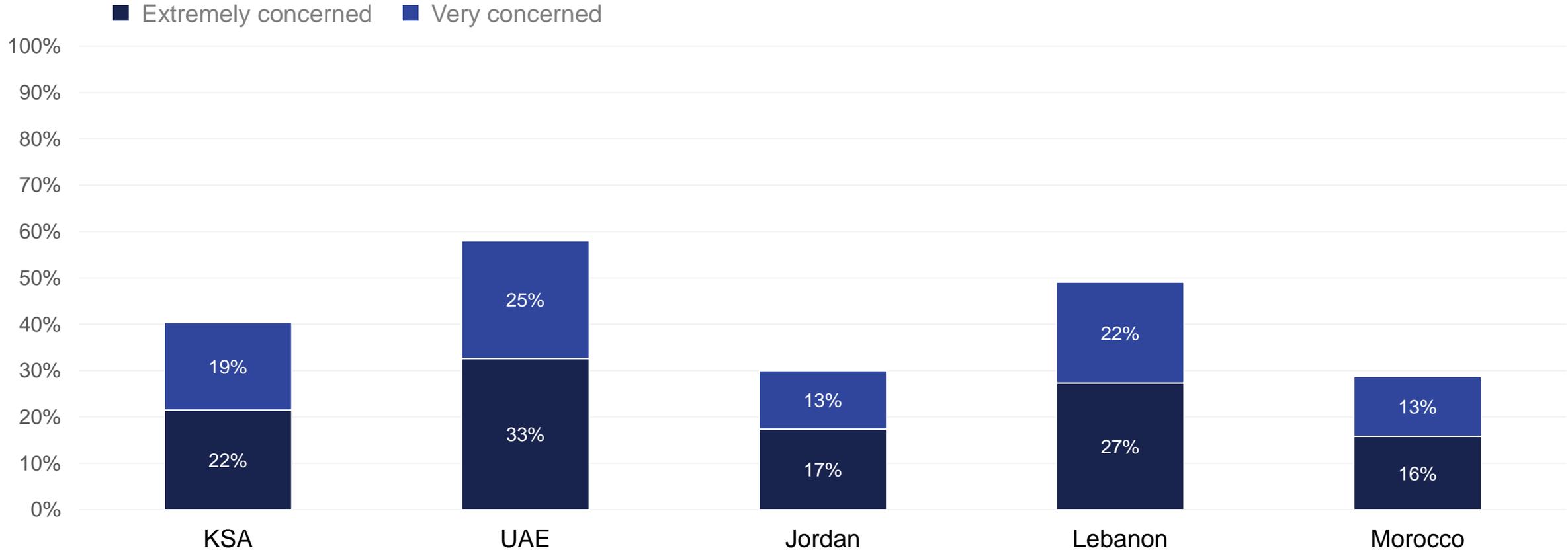
The coronavirus or COVID-19 outbreak will have an on-going impact on financial markets and the global economy

● Mar 20-23 ● Mar 27-30 ● Apr 3-6 ● Apr 10-13



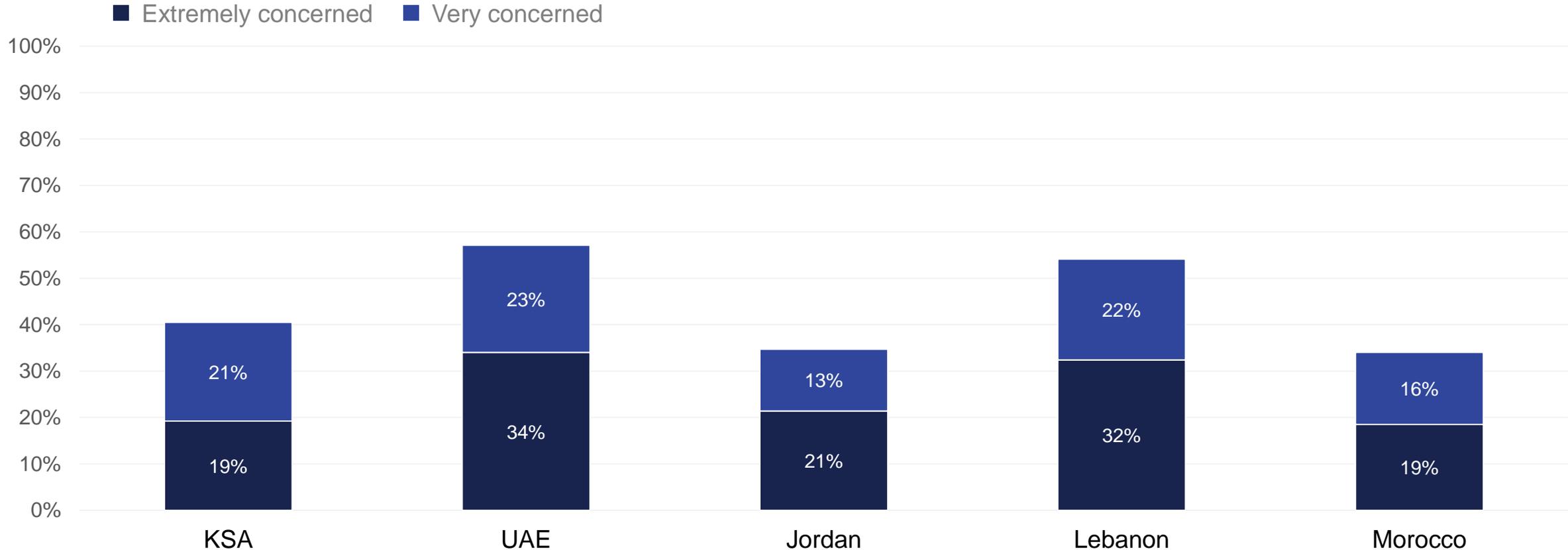
CONCERNS REGARDING JOB LOSSES VERY HIGH IN THE UAE AND LEBANON, SIGNIFICANTLY LOWER IN MOROCCO AND JORDAN

*Thinking one month from now, how concerned are you about each of the following?
I will have a job*



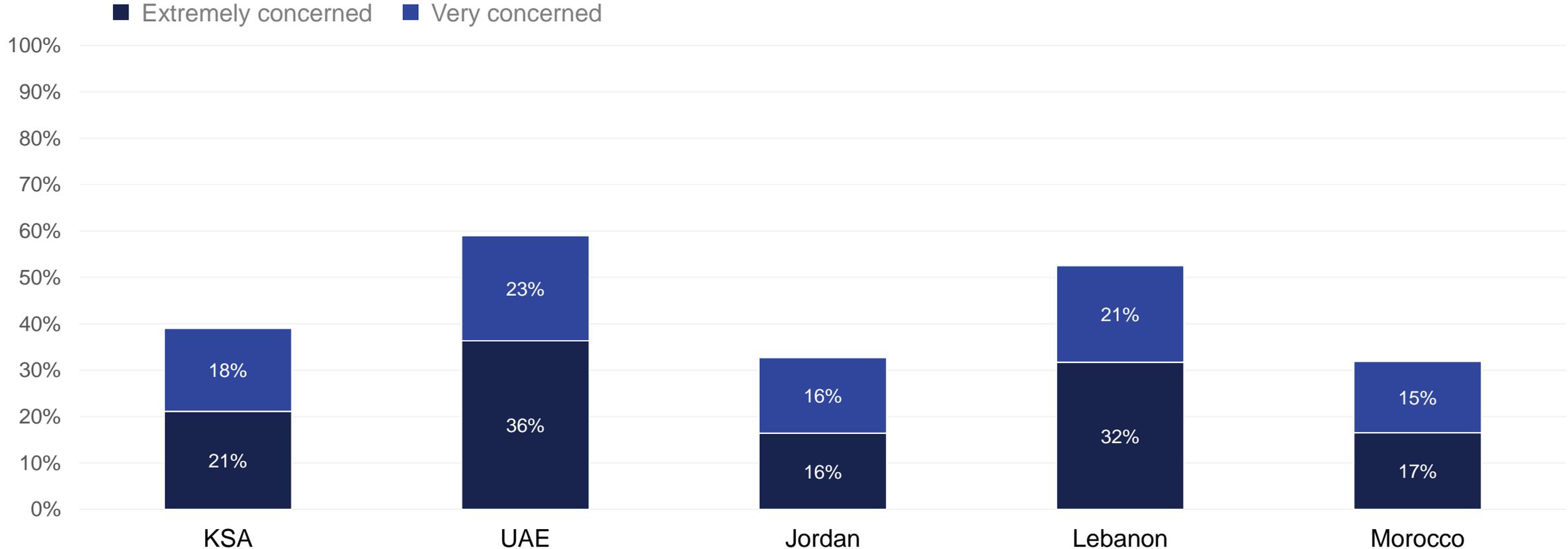
ABILITY TO PAY BILLS IN THE NEAR FUTURE IS ALSO HIGHEST IN THE UAE AND LEBANON.

*Thinking one month from now, how concerned are you about each of the following?
I will be able to pay my bills*



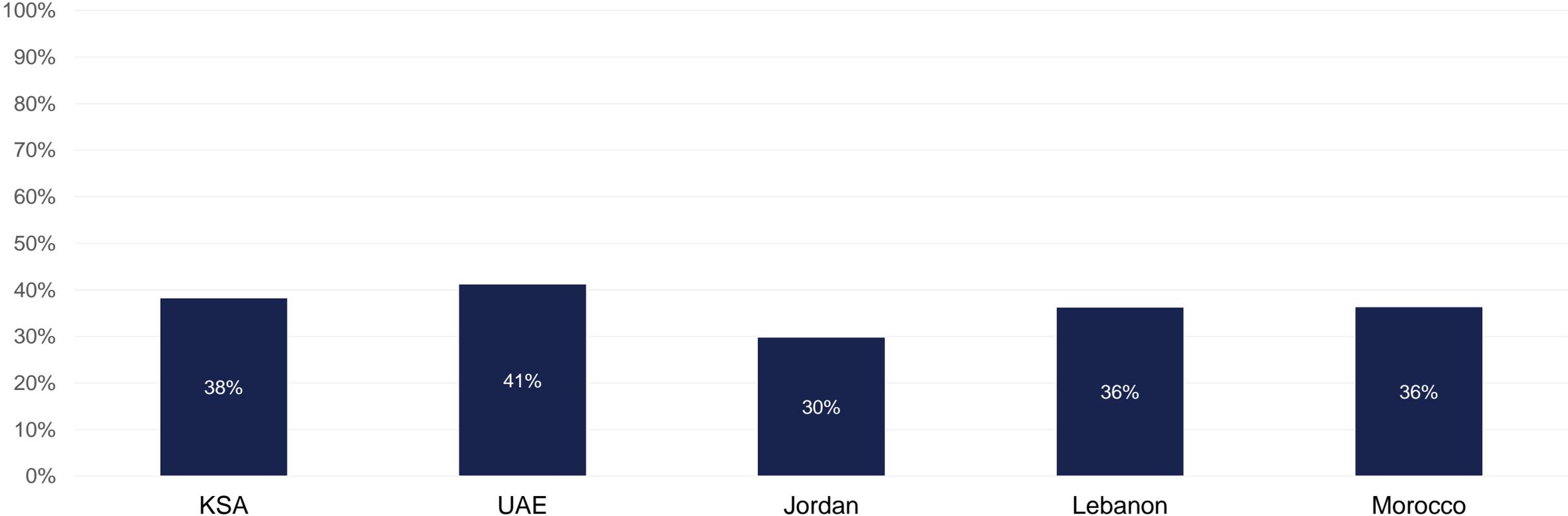
THE VIRUS'S THREAT IN LEBANON AND UAE EXTENDS TO QUESTIONING THEIR ABILITY TO PROVIDE FOR THEIR FAMILIES.

*Thinking one month from now, how concerned are you about each of the following?
I will be able to provide for myself and family*



RISING PROPORTIONS OF SAVINGS EXPECTED ACROSS THE REGION, HIGHEST IN THE UAE.

Put more money in savings

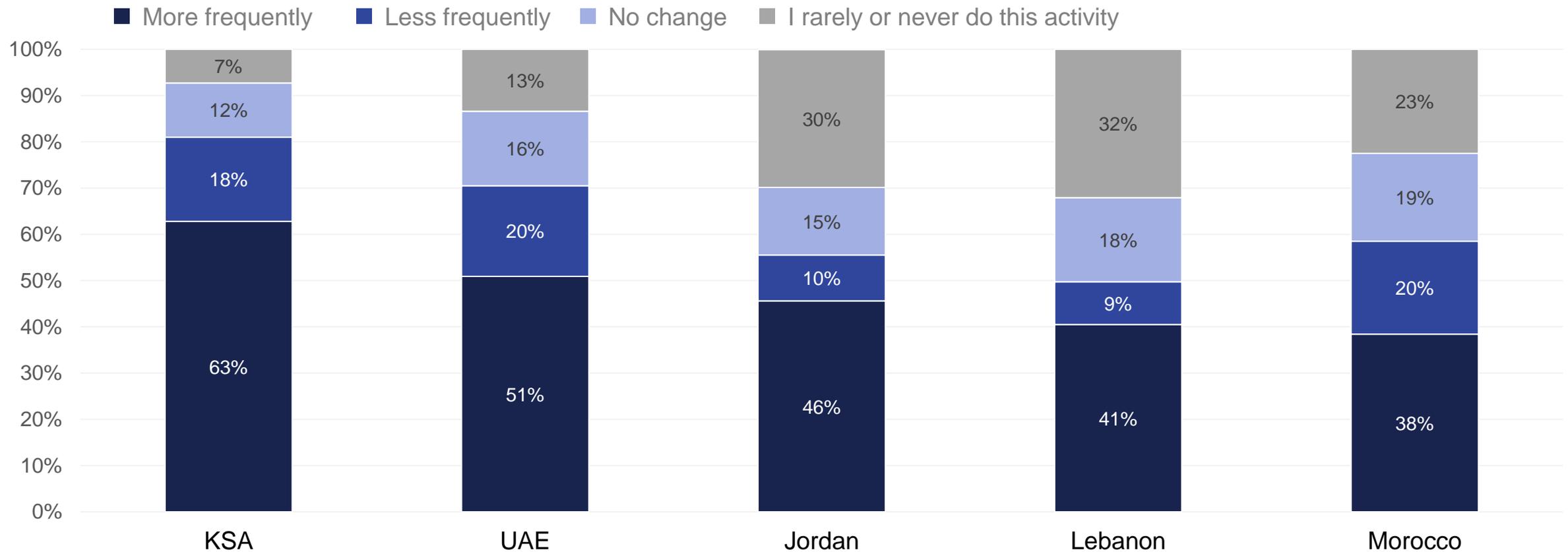


Which of the following, if any, have you done recently or are you planning to do in the coming weeks to protect you and your family financially:



SUBSTANTIAL INCREASE OF RELIANCE ON E-COMMERCE ACROSS MENA REGION, MOST NOTICEABLY IN KSA.

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

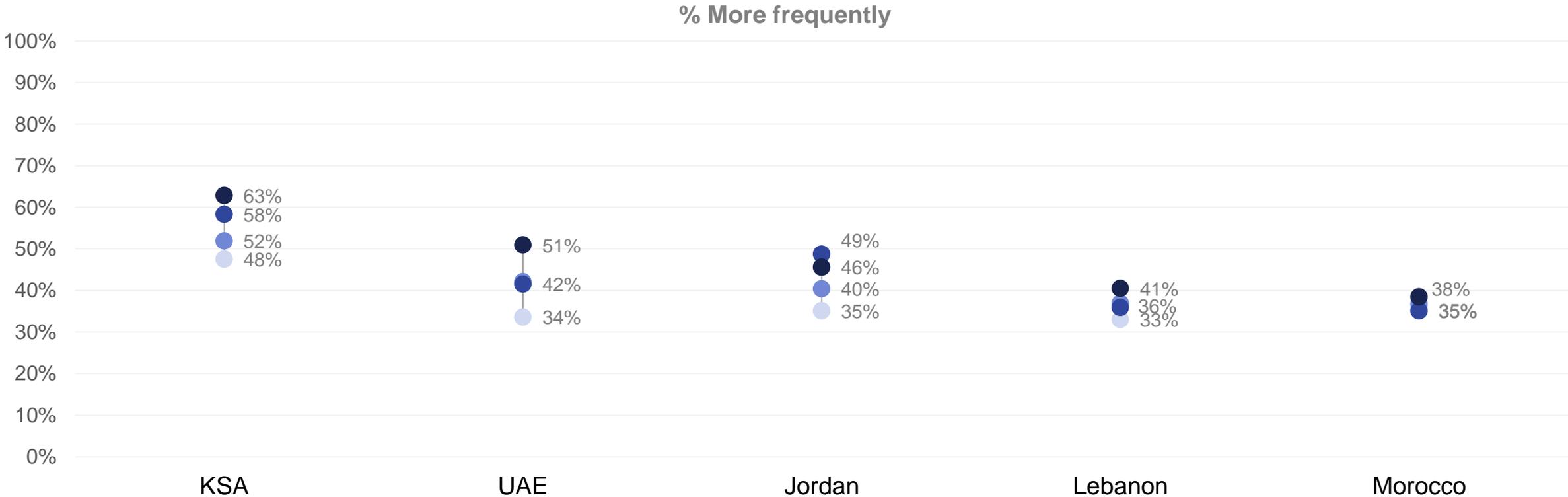


What about each of the following, would you say are doing each of the following more frequently or less frequently compared to one month ago?

GENERALLY, THE POPULARITY OF E-COMMERCE IS PROGRESSIVELY REACHING NEW HEIGHTS IN THE MENA REGION AS THE PANDEMIC LINGERS.

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

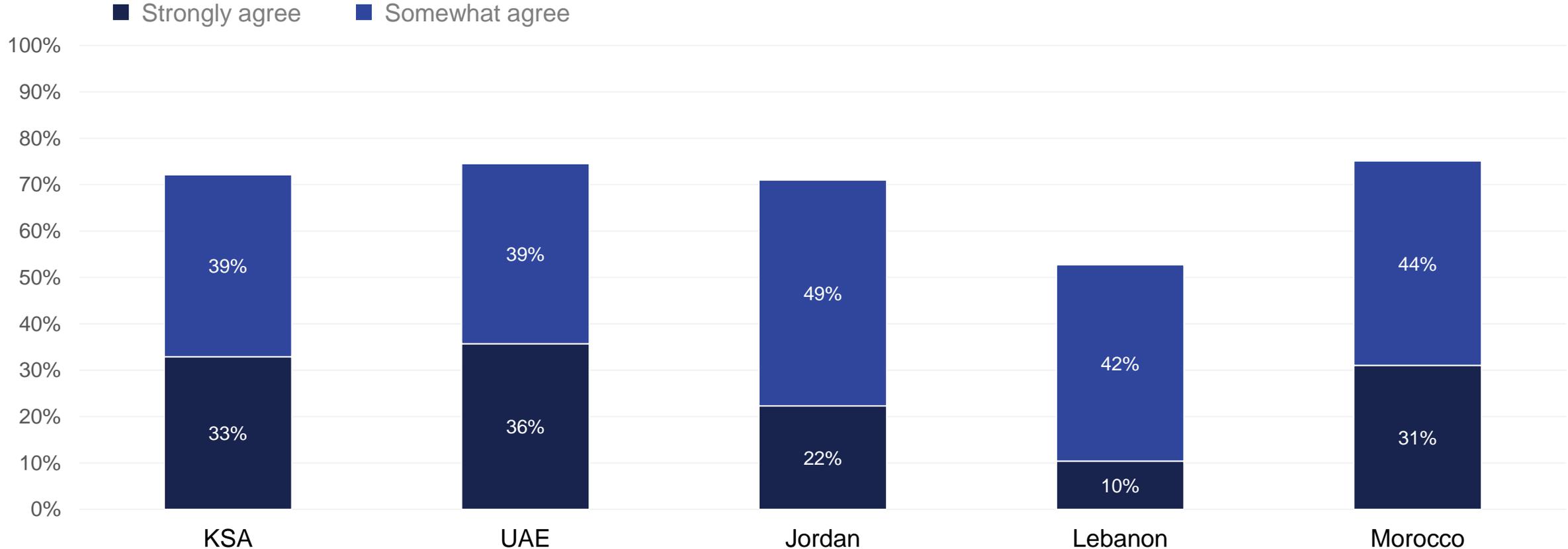
● Mar 20-23 ● Mar 27-30 ● Apr 3-6 ● Apr 10-13



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?

LEBANON PERSISTS WITH PESSIMISTIC FUTURE PROSPECTS IN RELATION TO THE OTHER COUNTRIES IN THE REGION.

I expect things to return to normal by June

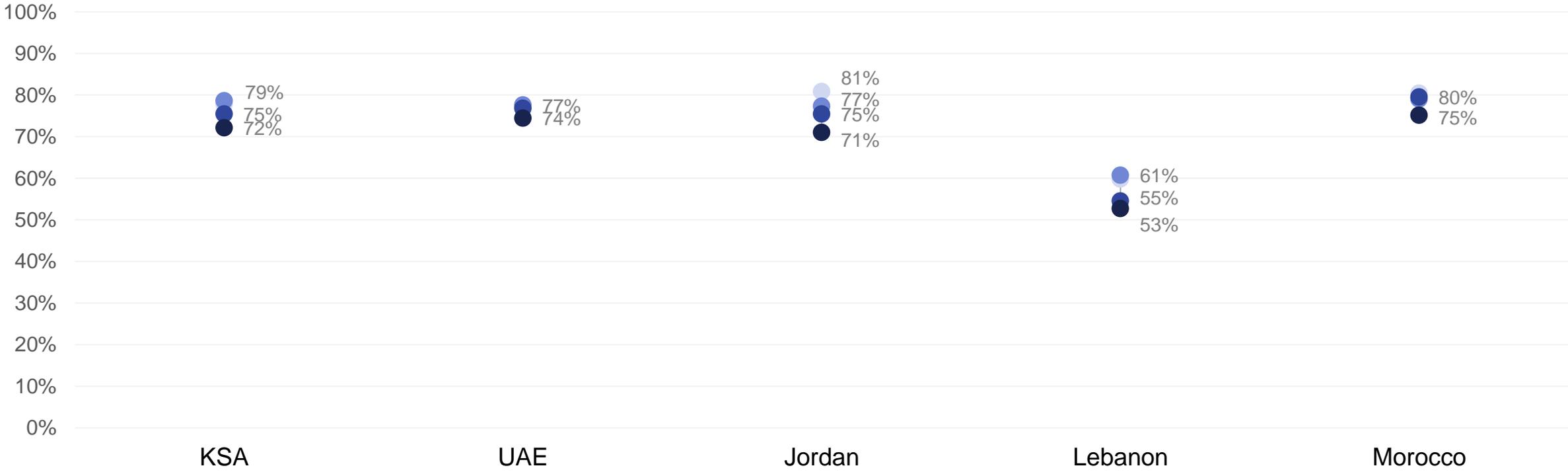


OPTIMISM OF THINGS RETURNING TO NORMAL BY JUNE REACHING ITS LOWEST POINT ACROSS THE REGION.

I expect things to return to normal by June

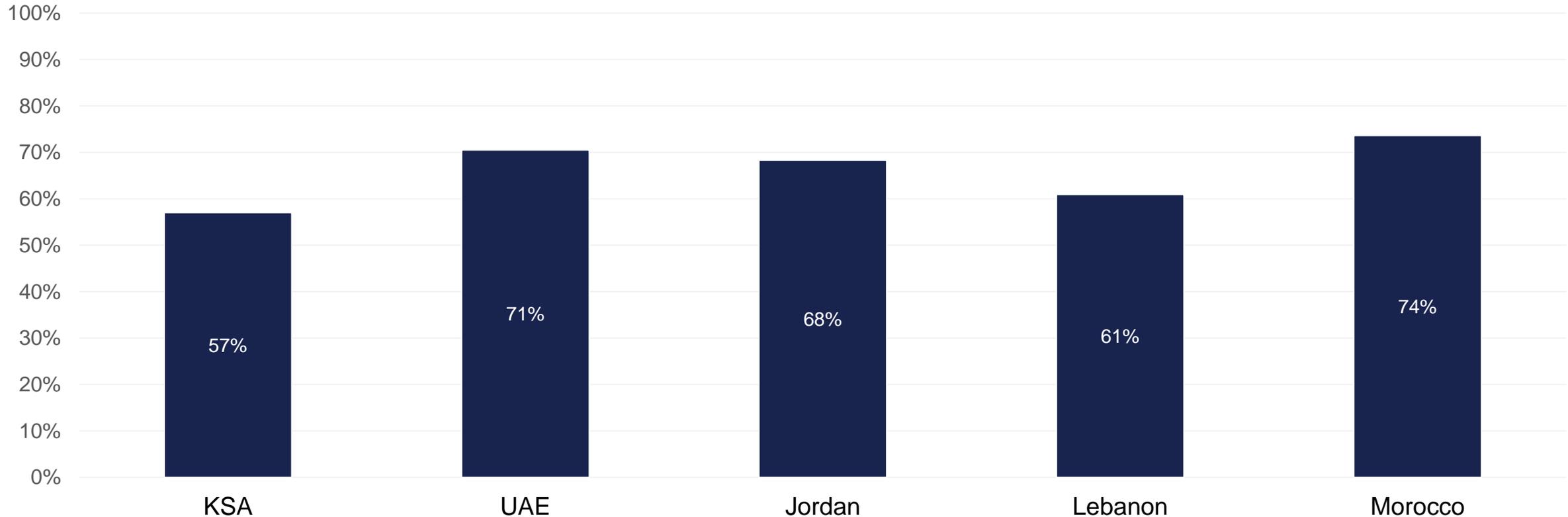
● Mar 20-23 ● Mar 27-30 ● Apr 3-6 ● Apr 10-13

% Strongly + Somewhat agree



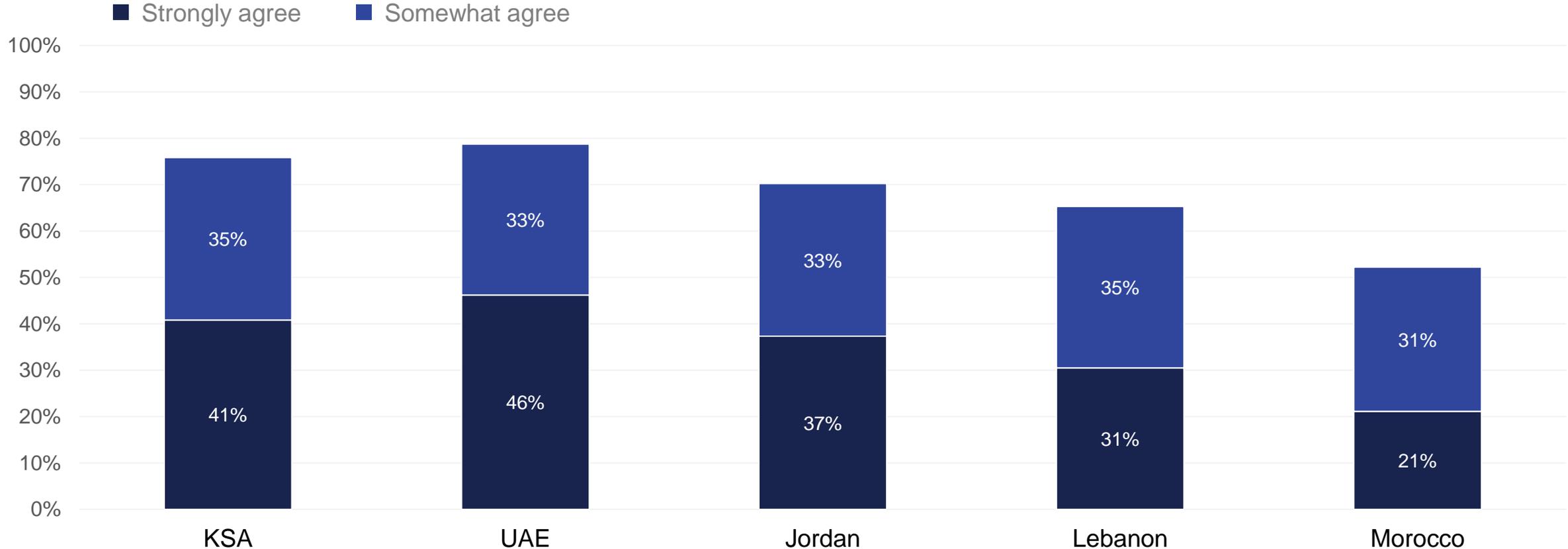
MOST AGREE PEOPLE SHOULD MAKE A HABIT OF WEARING FACE MASKS EVEN AFTER THE PANDEMIC IS OVER.

Please indicate which of the following applies to you and your point of view on face masks
People should wear face masks in public even when this pandemic is over to protect others.



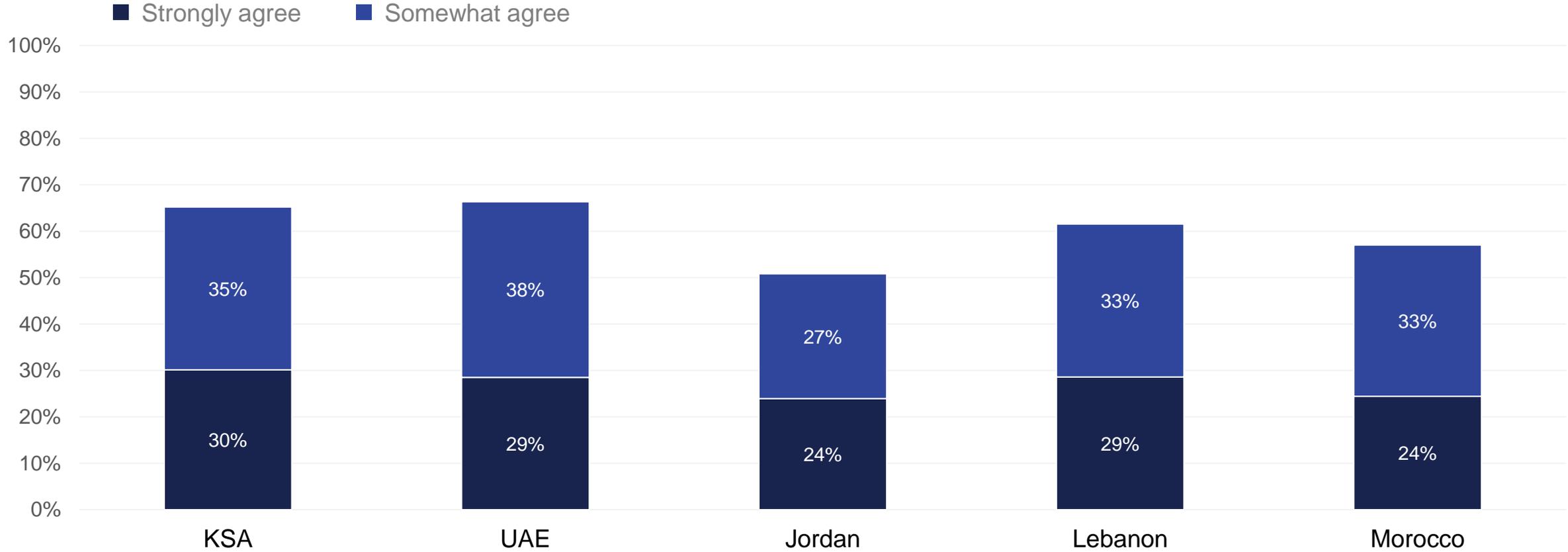
IF A VACCINE IS DEVELOPED, A MAJORITY IN MOST COUNTRIES VERY LIKELY TO TAKE IT, LESS SO IN MOROCCO.

I would take a vaccine for Coronavirus or COVID-19 as soon as one is developed



JORDAN IS LESS LIKELY TO BELIEVE THAT THEIR LIFE WILL GO BACK TO THE WAY IT WAS BEFORE THE OUTBREAK.

I will go back to doing all of the things I did before including vacations and travel

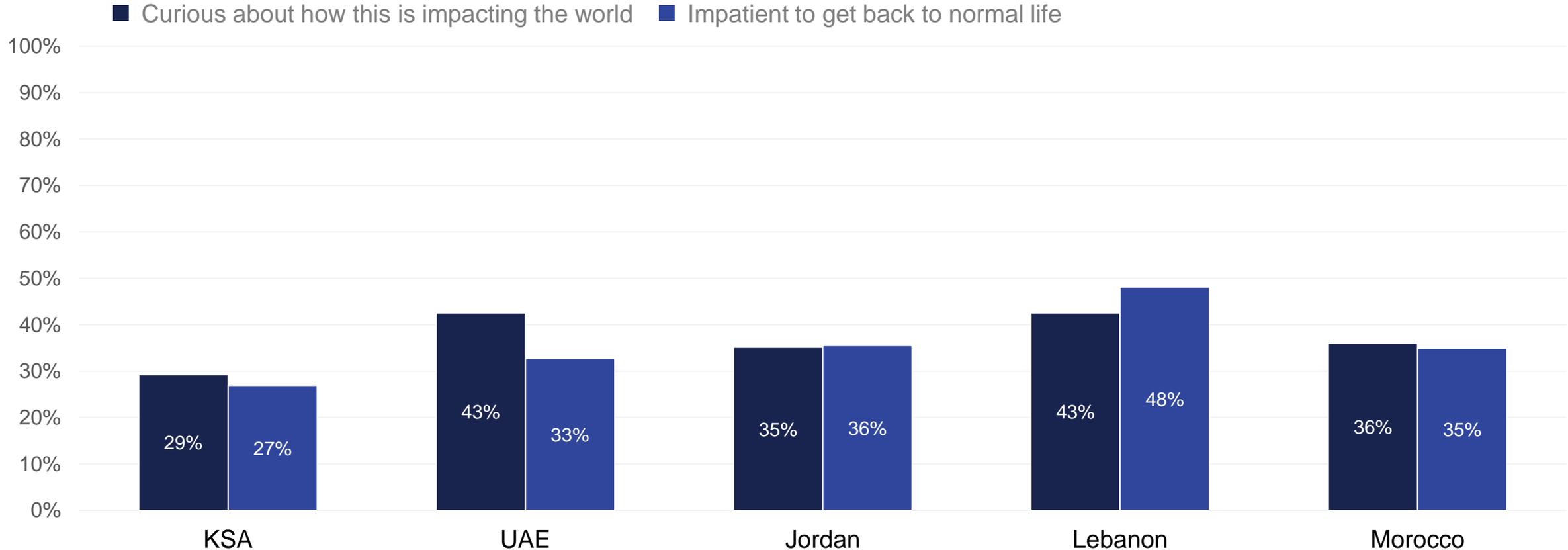


To what extent do you agree or disagree with each of the following regarding the long-term impact of the virus:



LEBANON MOST IMPATIENT TO GET BACK TO NORMAL, WHEREAS PEOPLE IN UAE ARE FEELING CURIOUS ABOUT UPCOMING CHANGES.

Which best describes how you are feeling today?



METHODOLOGY AND NOTES

METHODOLOGY

These are the results the fourth and final wave of an Ipsos survey conducted April 10-13 2020 in the MENA Region following three waves done between March 20th – April 6th 2020. The study covered KSA, UAE, Jordan, Lebanon and Morocco and was conducted through online surveys.

For KSA & UAE, the sample is representative of the general population, as for 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
Jordan	500
Lebanon	500
Morocco	500

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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

In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

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.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

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

