COVID-19 MENA CONSUMER SENTIMENT TRACKER

UNDERSTANDING ATTITUDES, BEHAVIORS AND FUTURE EXPECTATIONS
(KSA, UAE, Morocco, Jordan, Lebanon)

Wave 4: 10th – 13th April, 2020
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?

- Extremely seriously + Very seriously

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>KSA</td>
<td>50%</td>
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<tr>
<td>UAE</td>
<td>53%</td>
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<tr>
<td>Jordan</td>
<td>41%</td>
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<tr>
<td>Lebanon</td>
<td>38%</td>
</tr>
<tr>
<td>Morocco</td>
<td>42%</td>
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</tbody>
</table>
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?

- KSA: 43% Very high threat, 33% High threat
- UAE: 41% Very high threat, 33% High threat
- Jordan: 38% Very high threat, 34% High threat
- Lebanon: 35% Very high threat, 42% High threat
- Morocco: 46% Very high threat, 34% High threat
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

<table>
<thead>
<tr>
<th>Country</th>
<th>% Very high + High threat for your country</th>
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<tbody>
<tr>
<td>KSA</td>
<td>76%</td>
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<tr>
<td>UAE</td>
<td>74%</td>
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<tr>
<td>Jordan</td>
<td>74%</td>
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<tr>
<td>Lebanon</td>
<td>89%</td>
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<tr>
<td>Morocco</td>
<td>80%</td>
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</table>
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?

- **KSA**: 36% Very high threat, 34% High threat
- **UAE**: 41% Very high threat, 32% High threat
- **Jordan**: 35% Very high threat, 35% High threat
- **Lebanon**: 28% Very high threat, 38% High threat
- **Morocco**: 40% Very high threat, 27% High threat
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

KSA  UAE  Jordan  Lebanon  Morocco

70%  72%  70%  70%  66%
67%  64%  68%  66%  65%
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?

- Very seriously
- Somewhat seriously
- Not at all seriously

<table>
<thead>
<tr>
<th>Country</th>
<th>Very seriously</th>
<th>Somewhat seriously</th>
<th>Not at all seriously</th>
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</thead>
<tbody>
<tr>
<td>KSA</td>
<td>10%</td>
<td>52%</td>
<td>38%</td>
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<tr>
<td>UAE</td>
<td>7%</td>
<td>35%</td>
<td>58%</td>
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<tr>
<td>Jordan</td>
<td>7%</td>
<td>46%</td>
<td>48%</td>
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<tr>
<td>Lebanon</td>
<td>6%</td>
<td>58%</td>
<td>36%</td>
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<tr>
<td>Morocco</td>
<td>9%</td>
<td>49%</td>
<td>42%</td>
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SERIOUSNESS IN JORDAN AND LEBANON RISING BACK WHILE DECLINING IN MOROCCO.

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

<table>
<thead>
<tr>
<th>Country</th>
<th>Mar 20-23</th>
<th>Mar 27-30</th>
<th>Apr 3-6</th>
<th>Apr 10-13</th>
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</thead>
<tbody>
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<td>KSA</td>
<td>59%</td>
<td>56%</td>
<td>55%</td>
<td>53%</td>
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<tr>
<td>UAE</td>
<td>52%</td>
<td>49%</td>
<td>50%</td>
<td>48%</td>
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<tr>
<td>Jordan</td>
<td>59%</td>
<td>56%</td>
<td>50%</td>
<td>48%</td>
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<tr>
<td>Lebanon</td>
<td>53%</td>
<td>47%</td>
<td>36%</td>
<td>30%</td>
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<tr>
<td>Morocco</td>
<td>52%</td>
<td>48%</td>
<td>42%</td>
<td>35%</td>
</tr>
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</table>
The coronavirus or COVID-19 outbreak will have an ongoing impact on financial markets and the global economy.

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

Strongly agree | Somewhat agree

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<thead>
<tr>
<th>Country</th>
<th>Strongly agree</th>
<th>Somewhat agree</th>
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</thead>
<tbody>
<tr>
<td>KSA</td>
<td>50%</td>
<td>36%</td>
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<tr>
<td>UAE</td>
<td>60%</td>
<td>30%</td>
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<tr>
<td>Jordan</td>
<td>56%</td>
<td>32%</td>
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<tr>
<td>Lebanon</td>
<td>57%</td>
<td>34%</td>
</tr>
<tr>
<td>Morocco</td>
<td>54%</td>
<td>30%</td>
</tr>
</tbody>
</table>
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.
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

<table>
<thead>
<tr>
<th>Country</th>
<th>Extremely Concerned</th>
<th>Very Concerned</th>
</tr>
</thead>
<tbody>
<tr>
<td>KSA</td>
<td>22%</td>
<td>19%</td>
</tr>
<tr>
<td>UAE</td>
<td>33%</td>
<td>25%</td>
</tr>
<tr>
<td>Jordan</td>
<td>17%</td>
<td>13%</td>
</tr>
<tr>
<td>Lebanon</td>
<td>27%</td>
<td>22%</td>
</tr>
<tr>
<td>Morocco</td>
<td>16%</td>
<td>13%</td>
</tr>
</tbody>
</table>
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

- Extremely concerned
- Very concerned

<table>
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<tr>
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<th>Very Concerned</th>
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</thead>
<tbody>
<tr>
<td>KSA</td>
<td>19%</td>
<td>21%</td>
</tr>
<tr>
<td>UAE</td>
<td>34%</td>
<td>23%</td>
</tr>
<tr>
<td>Jordan</td>
<td>21%</td>
<td>13%</td>
</tr>
<tr>
<td>Lebanon</td>
<td>32%</td>
<td>22%</td>
</tr>
<tr>
<td>Morocco</td>
<td>19%</td>
<td>16%</td>
</tr>
</tbody>
</table>
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

- **KSA**
  - Extremely concerned: 21%
  - Very concerned: 18%

- **UAE**
  - Extremely concerned: 36%
  - Very concerned: 23%

- **Jordan**
  - Extremely concerned: 16%
  - Very concerned: 16%

- **Lebanon**
  - Extremely concerned: 32%
  - Very concerned: 21%

- **Morocco**
  - Extremely concerned: 15%
  - Very concerned: 17%
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?

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

**KSA**
- More frequently: 63%
- Less frequently: 18%
- No change: 13%
- I rarely or never do this activity: 7%

**UAE**
- More frequently: 51%
- Less frequently: 20%
- No change: 16%
- I rarely or never do this activity: 13%

**Jordan**
- More frequently: 46%
- Less frequently: 15%
- No change: 10%
- I rarely or never do this activity: 9%

**Lebanon**
- More frequently: 41%
- Less frequently: 18%
- No change: 10%
- I rarely or never do this activity: 9%

**Morocco**
- More frequently: 38%
- Less frequently: 20%
- No change: 19%
- I rarely or never do this activity: 23%
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

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

- **KSA**: 33% strongly agree, 39% somewhat agree
- **UAE**: 36% strongly agree, 39% somewhat agree
- **Jordan**: 22% strongly agree, 49% somewhat agree
- **Lebanon**: 10% strongly agree, 42% somewhat agree
- **Morocco**: 31% strongly agree, 44% somewhat agree
OPTIMISM OF THINGS RETURNING TO NORMAL BY JUNE REACHING ITS LOWEST POINT ACROSS THE REGION.

I expect things to return to normal by June

<table>
<thead>
<tr>
<th>Country</th>
<th>Mar 20-23</th>
<th>Mar 27-30</th>
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<th>Apr 10-13</th>
</tr>
</thead>
<tbody>
<tr>
<td>KSA</td>
<td>79%</td>
<td>72%</td>
<td>77%</td>
<td>61%</td>
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<tr>
<td>UAE</td>
<td>75%</td>
<td>74%</td>
<td>77%</td>
<td>55%</td>
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<tr>
<td>Jordan</td>
<td>81%</td>
<td>75%</td>
<td>71%</td>
<td>53%</td>
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<tr>
<td>Lebanon</td>
<td>80%</td>
<td>75%</td>
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<tr>
<td>Morocco</td>
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KSA: Kingdom of Saudi Arabia, UAE: United Arab Emirates, Jordan, Lebanon, Morocco.
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.

KSA: 57%
UAE: 71%
Jordan: 68%
Lebanon: 61%
Morocco: 74%
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:

- Strongly agree
- Somewhat agree

<table>
<thead>
<tr>
<th>Country</th>
<th>KSA</th>
<th>UAE</th>
<th>Jordan</th>
<th>Lebanon</th>
<th>Morocco</th>
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</thead>
<tbody>
<tr>
<td>Strongly agree</td>
<td>30%</td>
<td>29%</td>
<td>24%</td>
<td>29%</td>
<td>24%</td>
</tr>
<tr>
<td>Somewhat agree</td>
<td>35%</td>
<td>38%</td>
<td>27%</td>
<td>33%</td>
<td>33%</td>
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</tbody>
</table>
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?

- Curious about how this is impacting the world
- Impatient to get back to normal life

![Chart showing the percentages of people feeling curious vs. impatient in different countries.](chart)
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).

<table>
<thead>
<tr>
<th>Country</th>
<th>Sample</th>
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<tr>
<td>KSA</td>
<td>1000</td>
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<tr>
<td>UAE</td>
<td>1000</td>
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<tr>
<td>Jordan</td>
<td>500</td>
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<tr>
<td>Lebanon</td>
<td>500</td>
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<tr>
<td>Morocco</td>
<td>500</td>
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THANK YOU

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