

ONE YEAR OF COVID-19

Ipsos survey for The World Economic Forum

Conducted February 19 - March 5, 2021

For more information, go to <https://www.ipsos.com/en/expectations-about-when-life-will-return-pre-covid-normal-vary-widely-across-world>

GAME CHANGERS



HOW LONG BEFORE RETURN TO NORMAL PRE-COVID LIFE

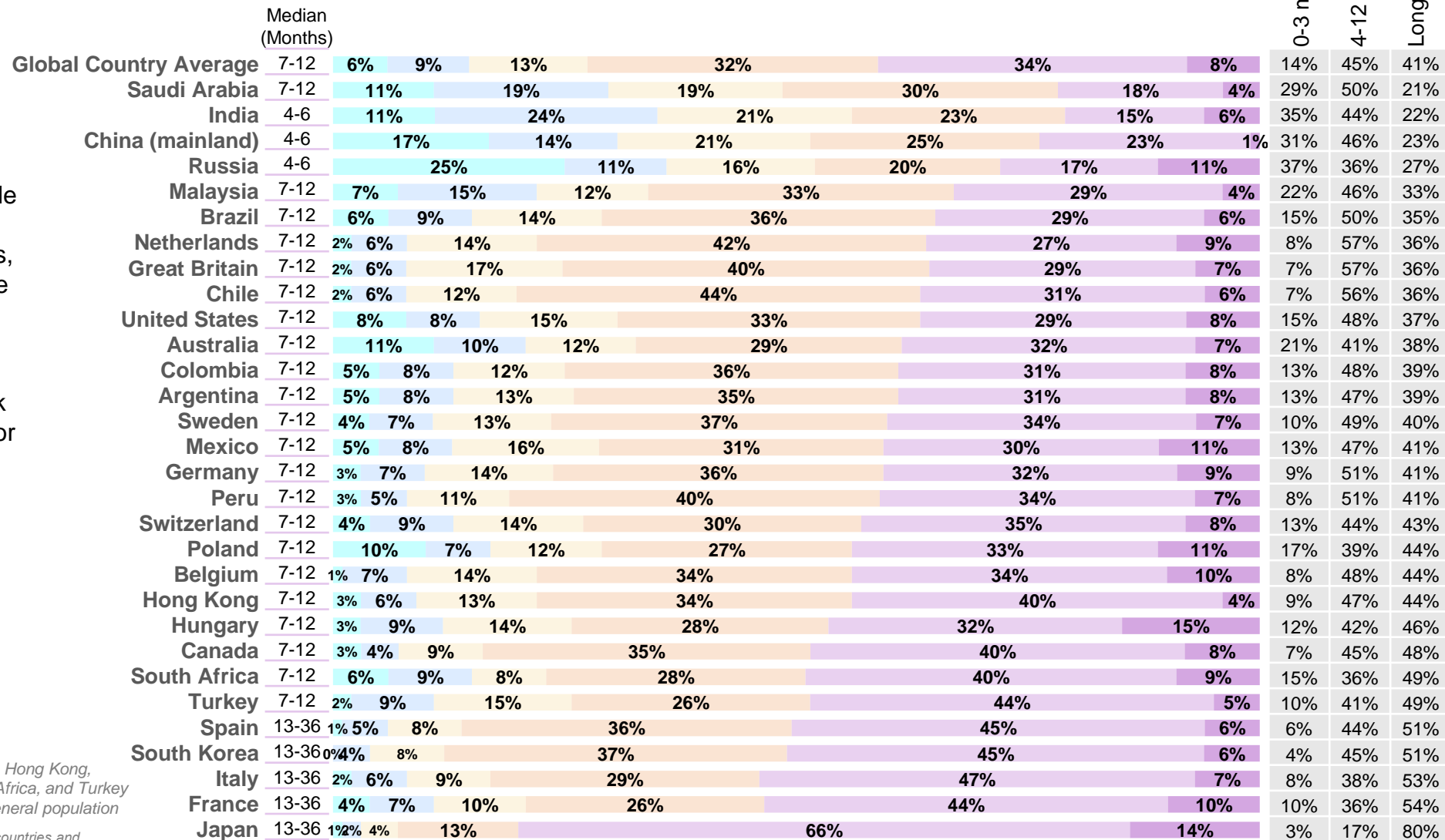
Q. How long do you think it will be before you can return to something like your normal pre-COVID life?

On average across the 30 countries and markets surveyed, 59% expect being able to return to something like their normal pre-COVID life within the next 12 months, including 6% who think this is already the case, 9% who think it will take no more than three months, 13% four to six months, and 32% seven to 12 months (the median time). About one in five think it will take more than three years (10%) or that it will never happen (8%).

Over 70% of adults in Saudi Arabia, Russia, India, and mainland China are confident their life will return to pre-COVID normal within a year. In contrast, 80% in Japan and more than half in France, Italy, South Korea, and Spain expect it will take longer.

Base: 21,011 online adults aged 16-74 across 30 markets
 * Online samples in Brazil, Chile, mainland China, Columbia, Hong Kong, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population

The "Global Country Average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.



■ Already the case
■ Within one month or three months
■ Within the next six months
■ In more than 12 months
■ Within the next year
■ Never



HOW LONG BEFORE COVID PANDEMIC IS CONTAINED

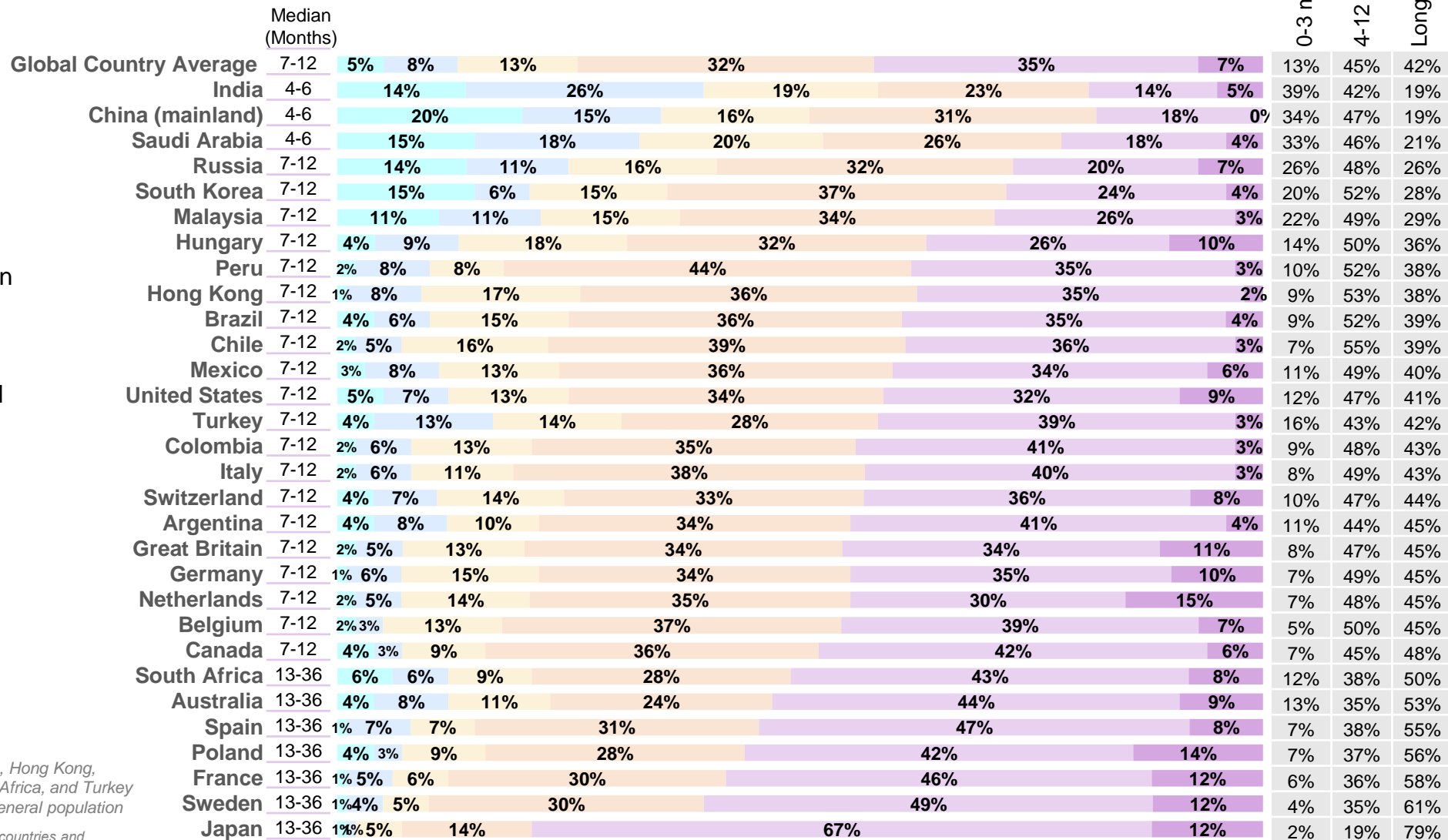
Q. How long do you think it will be before the coronavirus pandemic is contained?

On average across the 30 countries and markets surveyed, 58% expect the pandemic will have been contained within the next year, including 13% who think this is already the case or will happen within 3 months, 13% between four and six months and 32% between seven and 12 months (the median time in most markets).

Majorities in India, mainland China, and Saudi Arabia think the pandemic is already contained or will be within the next 6 months. In contrast, four in five in Japan and more than half in Australia, France, Poland, Spain, and Sweden expect it will take more than a year.

Base: 21,011 online adults aged 16-74 across 30 markets
 * Online samples in Brazil, Chile, mainland China, Columbia, Hong Kong, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population

The "Global Country Average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.



■ Already the case
■ Within one month or three months
■ Within the next six months
■ Within the next year
■ In more than 12 months
■ Never



GLOBAL COUNTRY AVERAGES

Q. How long do you think it will be before ... ?

At a global level, expectations about how long it will take before one's life can return to its pre-COVID normal and how long it will take for the pandemic to be contained are nearly identical.

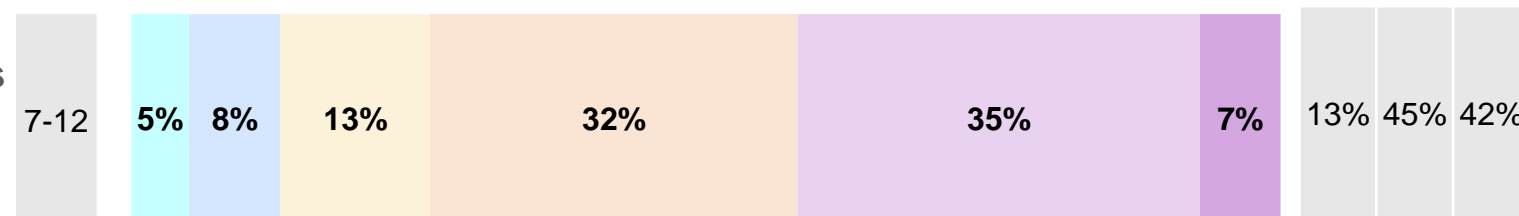
You can return to something like your normal pre-COVID life

Median (Months)



These findings suggest that people across the world consider that being able to return to "normal" life is entirely dependent on containing the pandemic.

The coronavirus pandemic is contained



- Already the case
- Within one month to three months
- Within the next six months
- Within the next year
- In more than 12 months
- Never

Base: 21,011 online adults aged 16-74 across 30 markets

The "Global Country Average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.

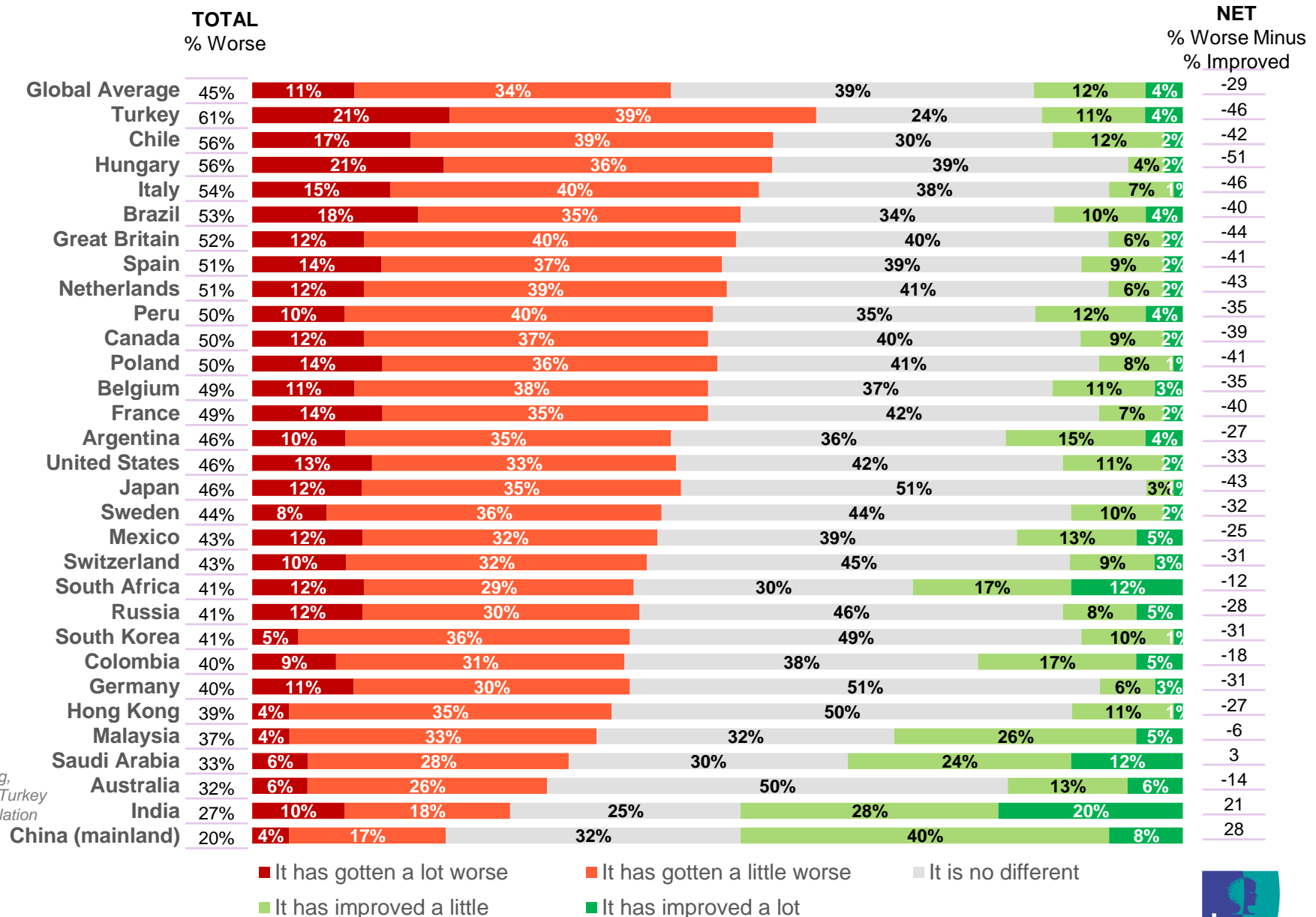
CHANGE IN EMOTIONAL AND MENTAL HEALTH VS. ONE YEAR AGO

Q. How has your emotional and mental health changed since the beginning of the pandemic about a year ago?

On average across the 30 countries and markets surveyed, 45% of adults say their emotional and mental health has gotten worse since the beginning of the pandemic about a year ago, three times the proportion of adults who say it has improved (16%)

In 11 countries, at least half report a decline in their emotional and mental health with Turkey, Chile and Hungary showing the largest proportions.

Only in mainland China, India, and Saudi Arabia do more adults report an improvement in their emotional and mental health than a decline.



Base: 21,011 online adults aged 16-74 across 30 markets

* Online samples in Brazil, Chile, mainland China, Columbia, Hong Kong, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population

The "Global Country Average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.



CHANGE IN EMOTIONAL AND MENTAL HEALTH VS. BEGINNING 2021

Q. How has your emotional and mental health changed since the beginning of 2021?

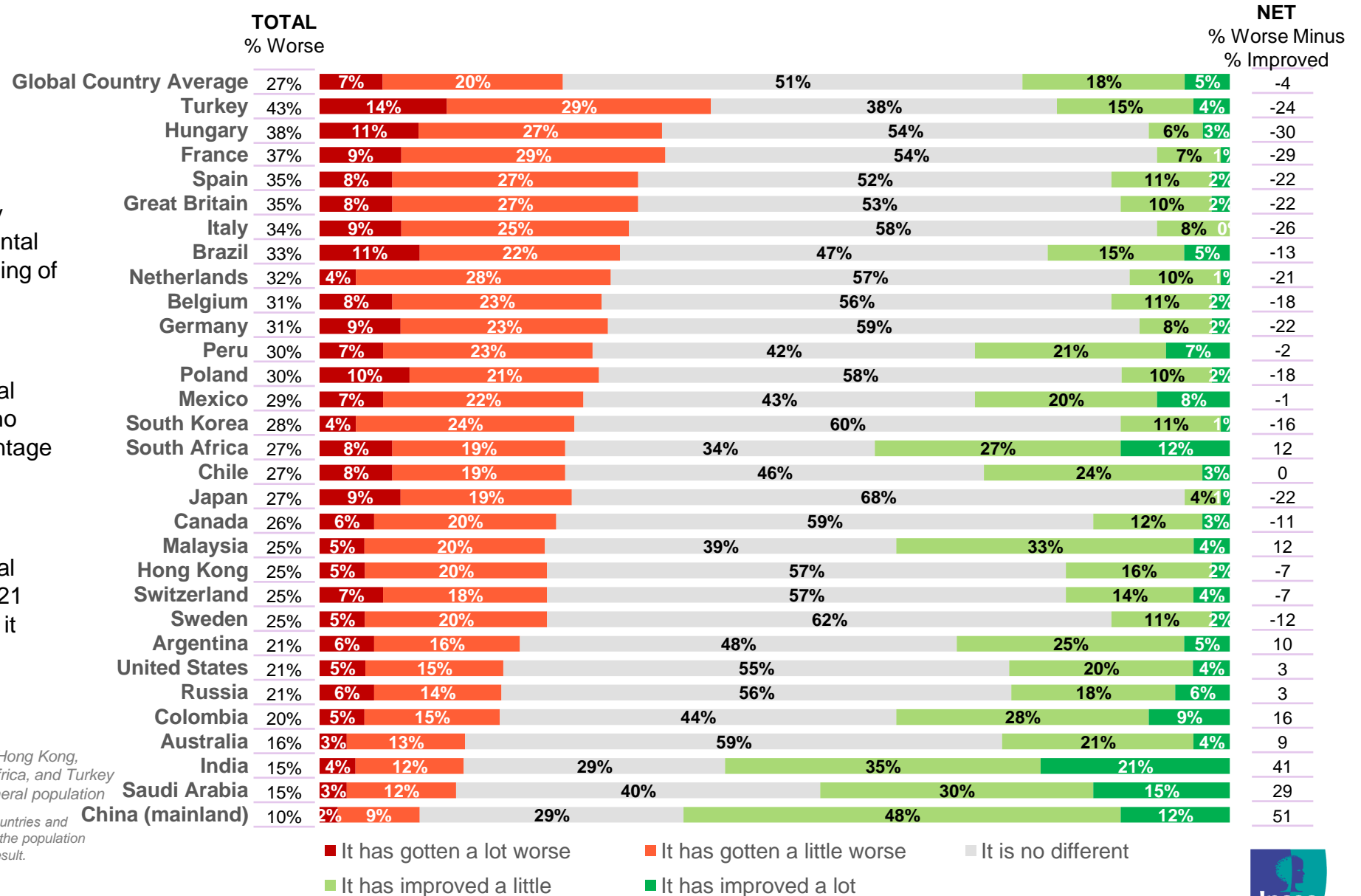
On average across the 30 countries and markets surveyed, adults are only slightly more likely to say their emotional and mental health has gotten worse since the beginning of 2021 (27%) than to say it has improved (23%).

Adults who say their emotional and mental health has improved outnumber those who say it has worsened by at least 40 percentage points in China (51 points) and India (41 points).

Those who say their mental and emotional health has improved since the start of 2021 are most outnumbered by those who say it has worsened in Hungary (by 30 points), France (29 points), and Italy (26 points).

Base: 21,011 online adults aged 16-74 across 30 markets
 * Online samples in Brazil, Chile, mainland China, Columbia, Hong Kong, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population

The "Global Country Average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.



■ It has gotten a lot worse
 ■ It has gotten a little worse
 ■ It is no different
■ It has improved a little
 ■ It has improved a lot



GLOBAL COUNTRY AVERAGES

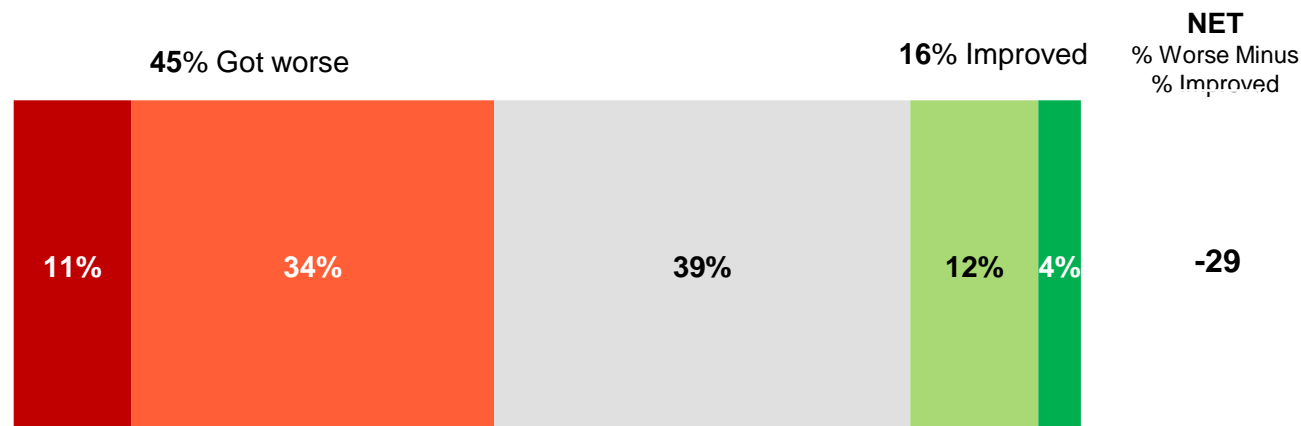
Q. How has your emotional and mental health changed since ...?

On average across the 30 countries and markets surveyed, 45% of adults say that since the beginning of the pandemic about a year ago, their mental and emotional health has gotten worse. Fewer (27%) say the same thing about the change in their mental/emotional health since the start of the year.

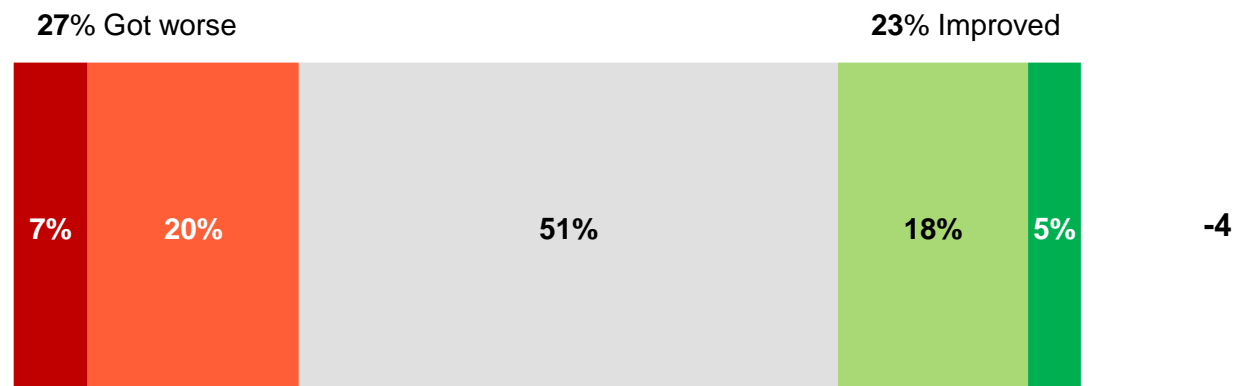
The average percentage of those who have seen an improvement in their emotional and mental health in the past three months (23%) is 7 points higher than the percentage of those reporting an improvement over a year ago.

The average percentage of those reporting no change since January 2021 (51%) is 12 points higher than the percentage of those reporting no change since the beginning of the pandemic.

The beginning of the pandemic about a year ago



The beginning of 2021



Base: 21,011 online adults aged 16-74 across 30 markets

The "Global Country Average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.

■ It has gotten a lot worse
 ■ It has gotten a little worse
 ■ It is no different
■ It has improved a little
 ■ It has improved a lot

METHODOLOGY

- These are the results of a 30-market survey conducted by Ipsos on its Global Advisor online platform. Ipsos interviewed a total of 21,011 adults aged 18-74 in United States, Canada, Hong Kong, Malaysia, South Africa, and Turkey, and 16-74 in 24 other markets between Friday February 19 and Friday March 5, 2021.
- The sample consists of approximately 1,000 individuals in each of Australia, Belgium, Brazil, Canada, China (mainland), France, Germany, Great Britain, Italy, Japan, Spain, and the U.S., and 500 individuals in each of Argentina, Chile, Colombia, Hong Kong, Hungary, India, Malaysia, Mexico, the Netherlands, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Sweden, Switzerland, and Turkey.
- The samples in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, the Netherlands, Poland, South Korea, Spain, Sweden, Switzerland, and the U.S. can be taken as representative of these countries' general adult population under the age of 75.
- The samples in Brazil, Chile, China (mainland), Colombia, Hong Kong, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa and Turkey are more urban, more educated, and/or more affluent than the general population. The survey results for these countries should be viewed as reflecting the views of the more "connected" segment of their 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 and of 500 accurate to +/- 4.8 percentage points. For more information on the Ipsos use of credibility intervals, please visit the Ipsos website.
- The publication of these findings abides by local rules and regulations.

ABOUT IPSOS

Ipsos is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people.

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).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg
IPS:FP
www.ipsos.com

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.

