

The Mindshare New Normal Tracker

The Mindshare New Normal Tracker Mindshare Worldwide is tracking the huge changes in consumer behaviour across the world due to COVID-19. On a bi-weekly basis we will follow countries as they transition from Lockdown, to Release, to Reassess and finally to a new reality.

These learnings will allow each country to understand where they stand but more importantly, learn from those emerging and what constitutes the New Normal.

Unless otherwise indicated this report contains data from Wave 1 w/c 30th March, Wave 2 w/c 13th April and Wave 3 w/c 27th April for the following markets:-

China, US, Germany, UK, Mexico, India, Singapore, France, Spain, Italy

With a 1,000 sample per market per wave

SENTIMENT

As China emerges from lockdown it remains the most hopeful and least worried country. Importantly, as the rest of the world looks forward to restrictions lifting, we are starting to see a small but significant increase in positivity across almost all markets. Only Spain and Italy, two of the hardest hit markets in Europe, buck that trend.

The Stringency Rating of Lockdown Measures

*Source : (OxCGRT) most recent available data as at 03.05.2020
** Methodology updated to include an additional 6 factors

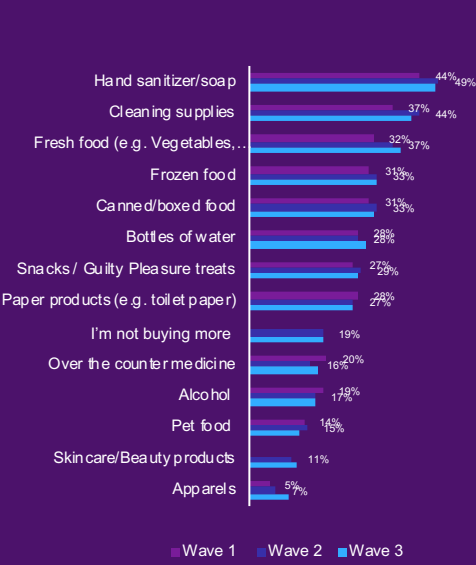
	Stringency Index* Based on 17** indicators of government response									
	57	68	79	82	68	100	81	94	89	95
	China	US	Germany	UK	Mexico	India	Singapore	France	Spain	Italy

Q. How do you feel about coronavirus (COVID-19)?

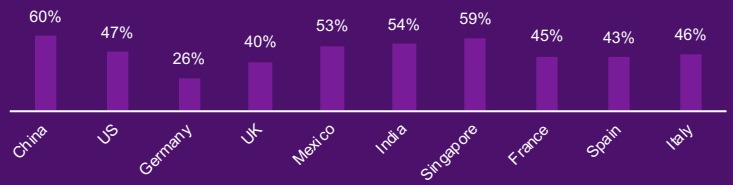
	China	US	Germany	UK	Mexico	India	Singapore	France	Spain	Italy
Negative										
Worried	46%	50%	49%	52%	61%	59%	60%	57%	70%	67%
Stressed	38%	38%	22%	32%	26%	40%	40%	30%	20%	42%
Confused	11%	15%	11%	17%	24%	26%	11%	15%	30%	30%
Positive										
Hopeful	26%	20%	14%	19%	25%	33%	20%	8%	23%	27%
Calm	18%	15%	17%	15%	23%	20%	19%	19%	11%	11%
Confident	19%	8%	16%	5%	11%	20%	8%	9%	9%	3%

SHOPPING

The end of the beginning. The huge shifts in consumer consumption have stabilised and lockdown shopping behaviour has begun to normalise. Interestingly, however, even when we see enormous differences by country in when people think "back to normal" will be, lockdown purchase habits remain remarkably similar.



Q. Is there anything you've been buying more now than before as a result of coronavirus?



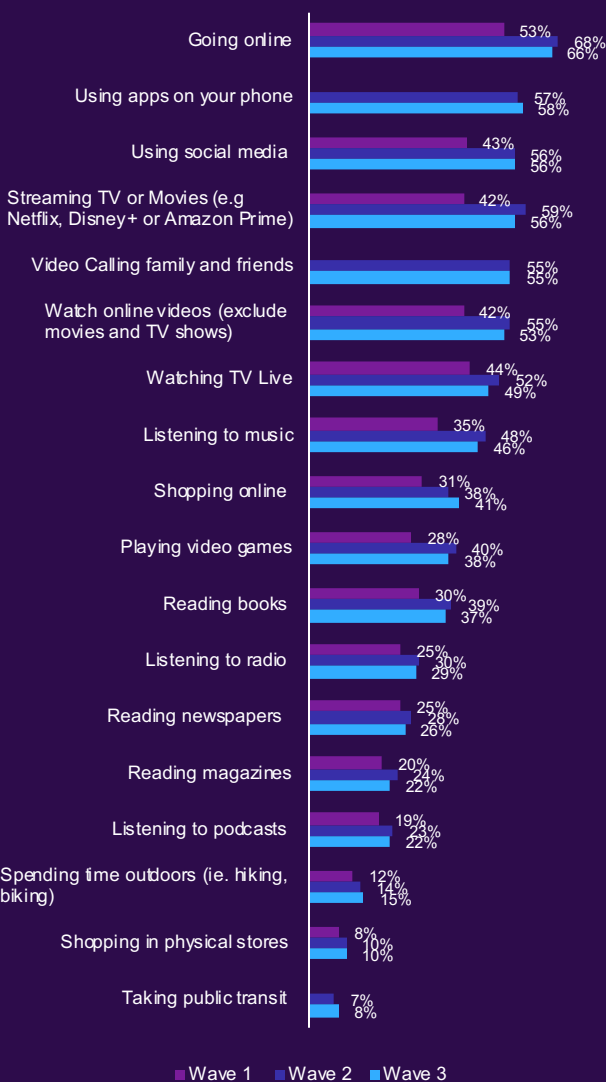
Q. "I am spending more in groceries than I did at the start of the outbreak – Strongly agree or agree"

	Within 2 weeks	Within a month	Within 2-3 months	Within 4-6 months	Within 7-9 months	Within 10-12 months	More than a year
China	157	148	137	108	100	47	23
US	122	91	102	100	96	85	109
Germany	57	42	64	100	151	155	132
UK	65	54	74	98	123	128	146
Mexico	53	110	145	105	61	69	68
India	342	299	113	67	58	64	23
Singapore	42	61	99	121	111	110	87
France	108	105	107	106	101	83	84
Spain	40	65	96	97	99	98	144
Italy	74	60	69	97	121	157	132

Q. In which timeframe do you think life will go 'back to normal'?

MEDIA

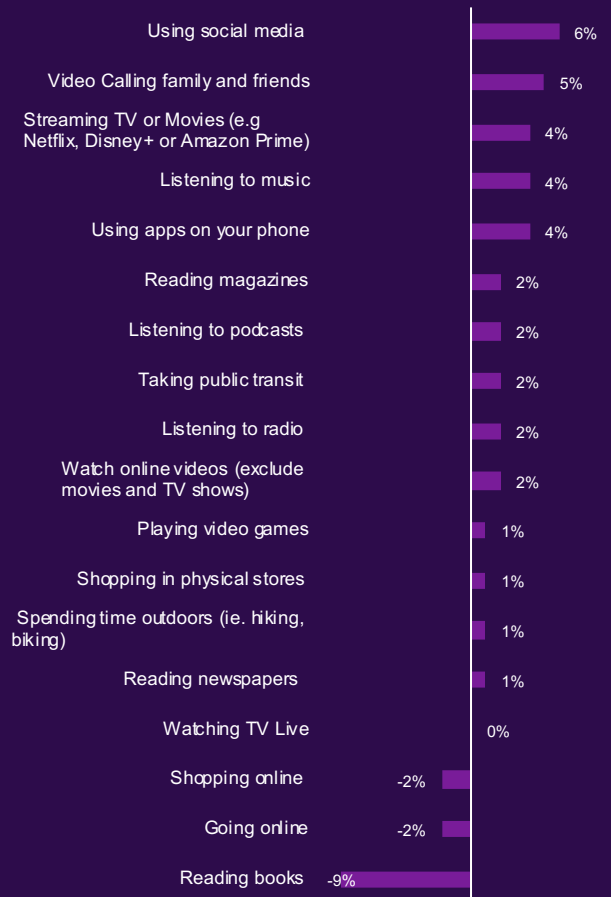
% Increase in usage all across all survey markets



Q. Comparing your behaviours before the coronavirus (COVID-19) outbreak to now, have you spent more time doing the following?

As China emerges from social isolation we see a seemingly counter intuitive increase in social media usage. This may be because, for the first time in months, people actually have something to share. Perhaps this suggests that social media's power lies less in social connection and more in its ability to facilitate a personal content strategy.

China % change in usage Wave 3 Vs Wave 2



Q. Comparing your behaviours in the last 2 weeks, have you spent more or less time doing the following?