

## 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 and Wave 2 w/c 13th April 2020 and includes data for the following markets

China, US, Germany, UK, Mexico, India, Singapore, France, Spain, Italy With a 1,000 sample per market

## SENTIMENT

Tracking both the level of lockdown in markets and also the impact that those on consumer sentiment. The path to the New Normal is unlikely to be straight forward and countries may move through several phases. In a lock downed US we see frustration at its highest at 40%. Germany, Spain and Italy's steps towards it's easing shows hope rising. But China, the first market to move towards its New Normal, still sees worry and stress rising suggesting it will take longer to improve. However, even though worry continues to be the dominant mindset, we are seeing it falling overall with a much larger decrease in those who say they feel scared (-8% globally).

### The Stringency Rating of Lockdown Measures

\*Source : (OxCGRT) WC 13.4.20

Green/red arrow indicates rising/falling state of lockdown since 30.3.20



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

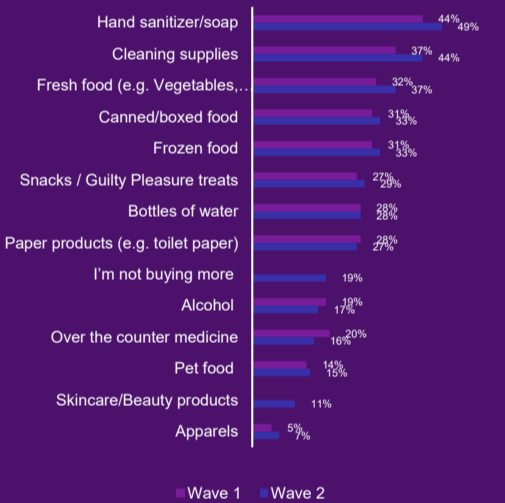
\*Note: UK sentiment data is an amalgamation of three questions so isn't directly comparable vs other markets

	China	France	Germany	India	Italy	Mexico	Singapore	Spain	UK	US
Negative	Worried	51%	64%	51%	59%	71%	65%	71%	56%	54%
	Stressed	42%	33%	23%	44%	37%	41%	20%	35%	42%
	Frustrated	15%	19%	23%	30%	23%	26%	39%	30%	40%
Positive	Hopeful	25%	13%	16%	30%	34%	25%	17%	30%	22%
	Calm	20%	19%	18%	15%	12%	21%	15%	15%	13%
	Confident	20%	12%	21%	18%	4%	9%	6%	10%	7%

## SHOPPING

Tracking focus of purchases and overall consumer spending. Some of the categories hardest hit by the crisis have been entertainment, travel, physical retail and eating out. However, the future is still bright for these businesses as they are precisely the activities consumers are missing the most.

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



### Q: What activities do you miss the most since the coronavirus outbreak?



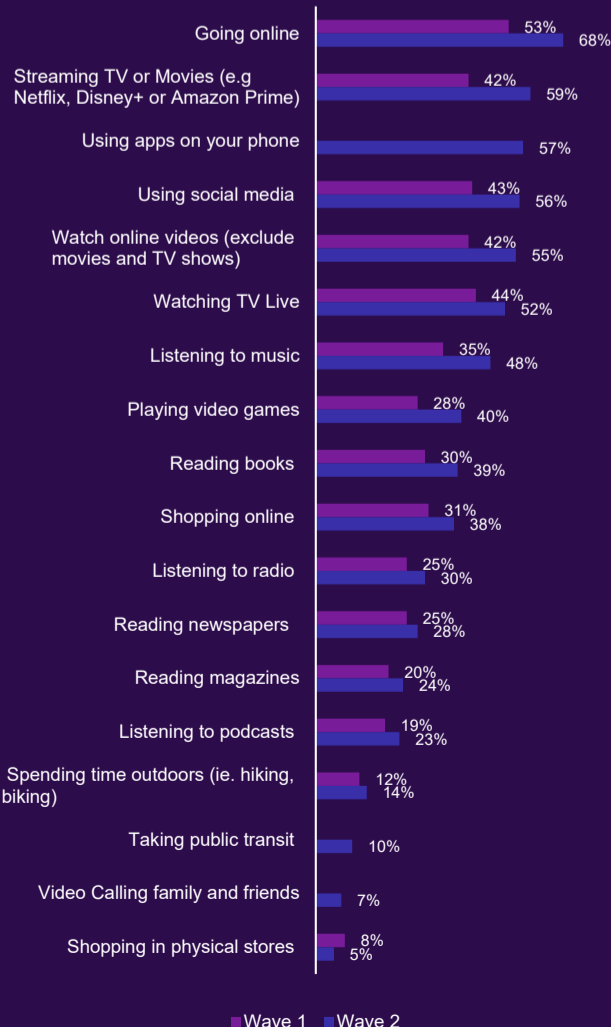
### Top markets

Freedom to go outside	Italy	68% (i155)
Dining Out	US	50% (i139)
Seeing people F2F	UK	56% (i156)
Going to stores/malls	China	51% (i159)
Travelling on vacation	Singapore	50% (i165)
Physical contact	Spain	46% (i192)
Going to movies	Mexico	44% (i210)

## MEDIA

Tracking use of media across all markets

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



### Are we beginning to value content once again?

I am worried about misinformation online

69%

I am more likely to pay for content than I used to

47%

### Are we feeling Coronavirus overload?

Deliberately choosing media to relax

55% (+7% Vs Wave 1)

I have limited my time on media (e.g. online) because I don't want to read any more news about coronavirus (COVID-19)

29%