

The Mindshare New Normal Tracker – Wave 7

Over the coming months the Mindshare Worldwide team are committed to tracking the huge changes in consumer behaviour across the world. 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 what constitutes the **New Normal**.

This report contains data from Wave 1 w/c 30th March, Wave 2 w/c 13th April, Wave 3 w/c 27th April, Wave 4 w/c 11th May, Wave 5 w/c 8th June, Wave 6 w/c 13th July and Wave 7 w/c 17th August for the following markets:-

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

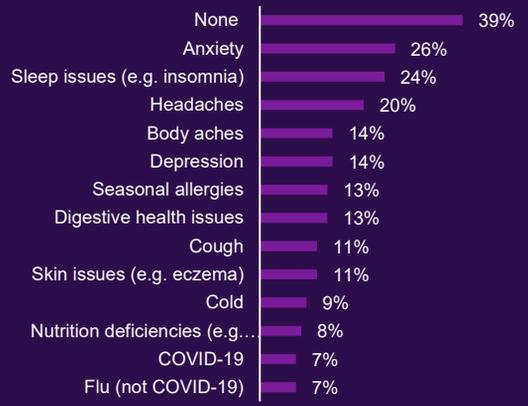
1,000 sample per market per wave

SENTIMENT

There has been huge emotional strain on audiences since the start of the pandemic, with over one quarter of our global sample suffering from anxiety. However, if we look at where they stand now vs its height (in April, our Wave 2 study) you can see it has fallen significantly. However, as the existential threat subsides this hasn't translated into a significant increase in positive sentiment.

Percentage point change in sentiment Wave 2 Vs Wave 7

	UK	Germany	India	Singapore	Mexico	France	US	Spain	Italy	China	Average change
Worried	-19%	-1%	-14%	-12%	-10%	-11%	-26%	-8%	-14%	-7%	-12%
Anxious	-15%	-2%	-5%	-4%	3%	-6%	-16%	-6%	-5%	-29%	-8%
Scared	-15%	-1%	-10%	-13%	-4%	-6%	-18%	-2%	-5%	-6%	-8%
Stressed	-7%	-17%	-7%	0%	3%	-7%	-14%	3%	-1%	-11%	-6%
Hopeful	-5%	-6%	6%	0%	0%	-6%	-6%	-16%	-14%	1%	-5%
Calm	2%	-13%	4%	2%	-3%	-6%	0%	-8%	-3%	-4%	-3%
Doubtful	4%	-18%	3%	4%	-6%	-4%	1%	1%	-3%	-7%	-3%
Relieved	4%	0%	5%	3%	-1%	0%	3%	0%	0%	-5%	1%
Happy	6%	4%	10%	4%	0%	-1%	6%	1%	1%	-2%	3%



Q. How do you feel about the Coronavirus?

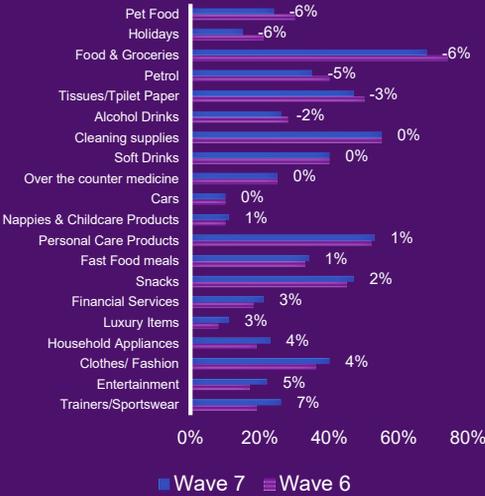
Q: Which of the following ailments or issues have you experienced since the start of the coronavirus (COVID-19) pandemic

SHOPPING

Despite a small rise in the number of people returning to physical shopping, online remains the dominant trend even with the measures stores have put in place to make them safe. We have also seen a small but significant shift in shopping behaviour this wave with the highest increases happening in non-essential categories such as clothing, entertainment and even luxury.

Future purchase behaviour

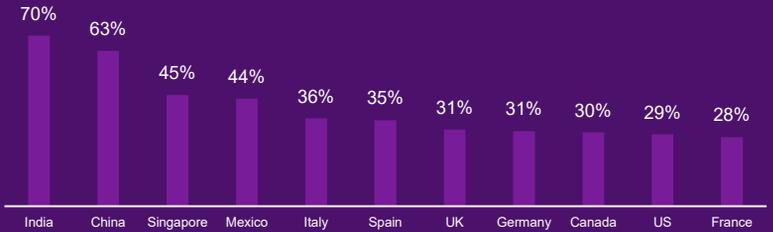
(% change in purchase intention Wave 6 vs Wave 7)



Q. Thinking about the next month, which of the following items do you think you will be spending on?



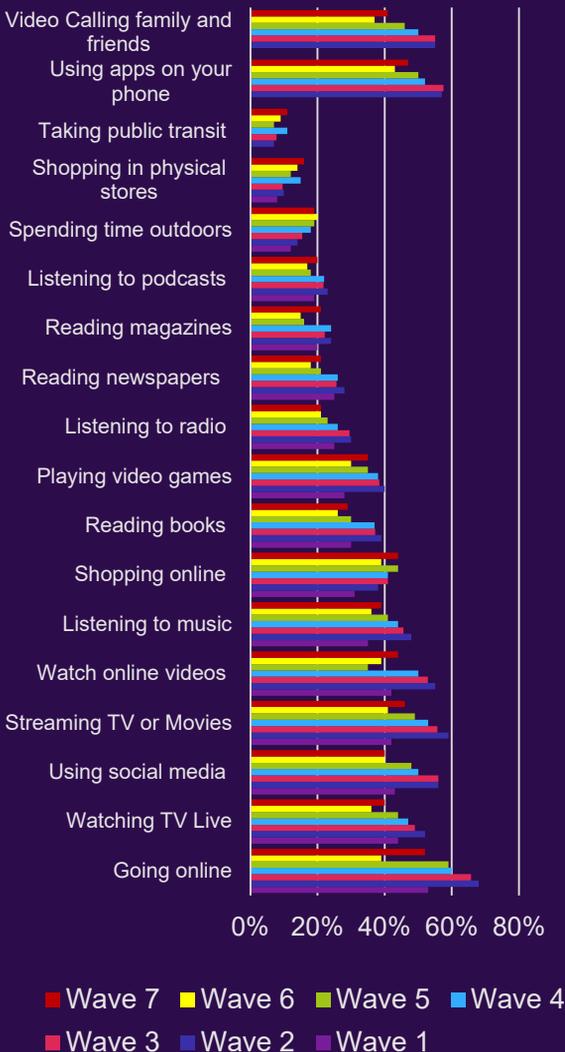
Q. Comparing your behaviours 2 weeks ago to now, have you spent more or less time doing the following



Q. New rules in shops such as wearing face masks have made me shop more online

MEDIA

% Increase in usage all across all surveyed markets



Q. Comparing your behaviours 2 weeks ago to now, have you spent more or less time doing the following?

Physical media experiences will clearly take some time to return to normal as they are the activities that most concern consumers. It will be particularly challenging as people continue to feel uncomfortable wearing PPE

