

The Mindshare New Normal Tracker – Wave 8

Over the coming months the Mindshare Worldwide team are committed to tracking the huge changes in consumer behaviour across the world. On a monthly 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, Wave 7 w/c 17th August and Wave 8 w/c 21st Sept. for the following markets:-

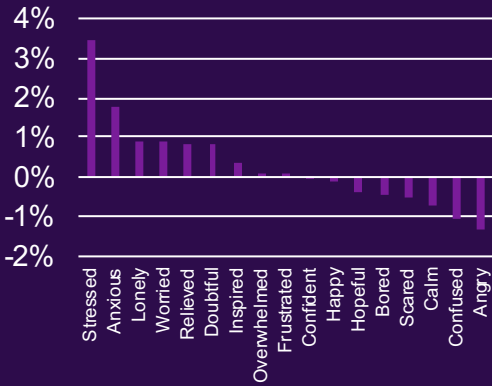
China, US, Germany, UK, Mexico, India, Singapore, France, Spain, Italy, Canada

1,000 sample per market per wave

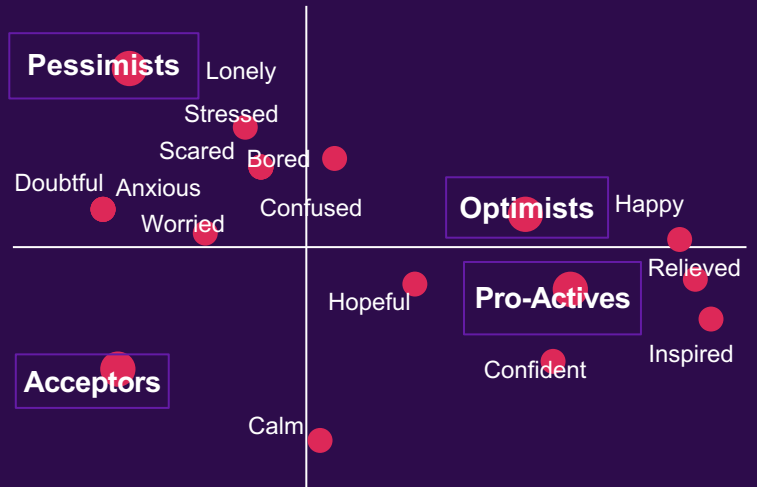
SENTIMENT

As markets move in and out of lockdown the fastest growing sentiment is stress. However, a deeper analysis shows four Covid-19 sentiment types emerging. There are Pessimists (the most stressed), Pro-Actives (those who have decided to take the most and active positive measures), Acceptors (aware of the challenges but remaining calm) and Optimists (the most positive and future facing mindset).

Percentage point change in sentiment Wave 7 Vs Wave 8



Q. How do you feel about the Coronavirus?



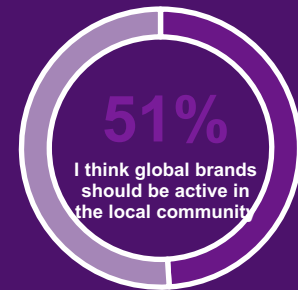
Q. How do you feel about the Coronavirus? Segmentation Factor Analysis

SHOPPING

A closer look at the segments shows a significant difference in how they shop, with Optimists and Pro-Actives the most attractive audiences for many advertisers. However, in these uncertain times, we see an increased appreciation across the board for brands that are both familiar and local.

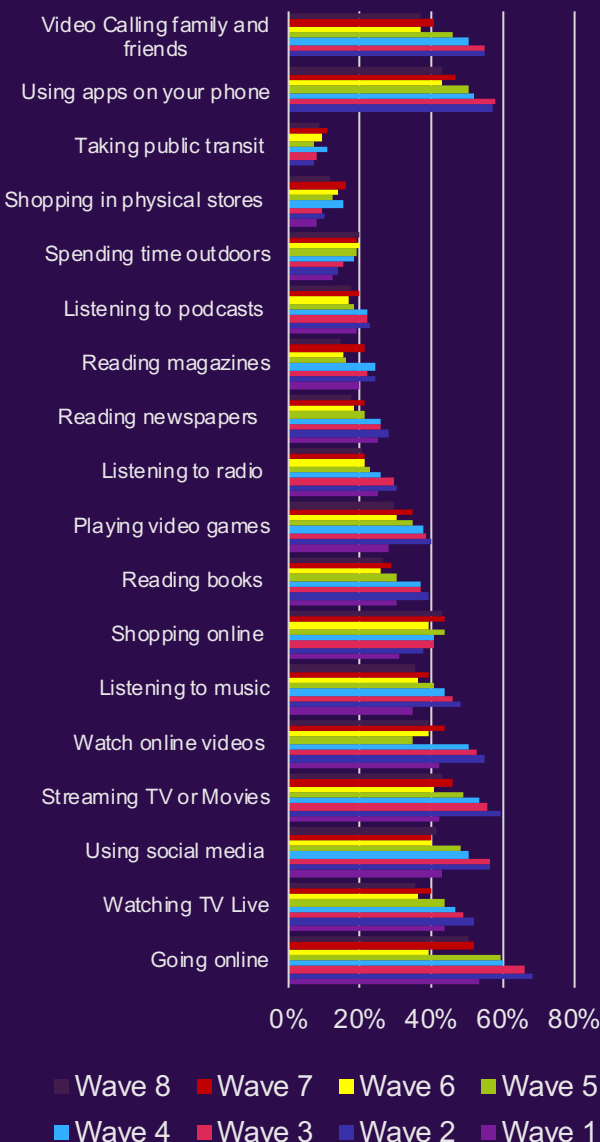
	Pro-Acceptors	Pro-Actives	Pessimists	Optimists
Snacks	96	117	106	85
Cleaning supplies	95	112	122	74
Over the counter medicine	85	105	125	96
Clothes/fashion	88	123	100	104
Fast food meals	81	117	112	107
Personal care products	95	113	114	81
Petrol	105	97	108	84
Alcoholic Drinks	101	101	105	92
Food/groceries	106	102	111	75
Soft drinks	102	107	103	86
Tissues/Toilet paper	102	103	119	72
Pet food	97	90	119	94
Financial Services/Products	60	148	93	143
Cars	64	107	70	200
Household appliances	63	126	106	143
Trainers/Sportswear	71	142	99	121
Holidays	83	118	76	144
Entertainment	60	140	88	156
Luxury items	47	125	71	215

Q. Thinking about the next month, which of the following are you thinking of purchasing? Index Vs total sample



Q. How much do you agree with the following statements (agree or strongly agree)

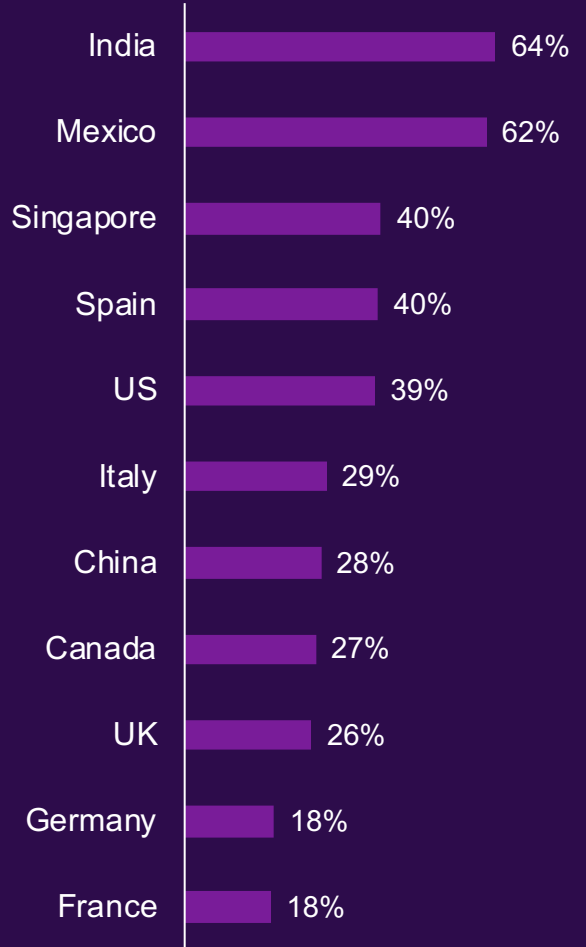
MEDIA



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

The Covid-19 has led to a huge rise in media consumption that centred on the home. In particular streaming services.

Bought a subscription to an on demand TV/film service (e.g. Netflix or Disney+)



Q. Since the pandemic started, have you done any of the following?