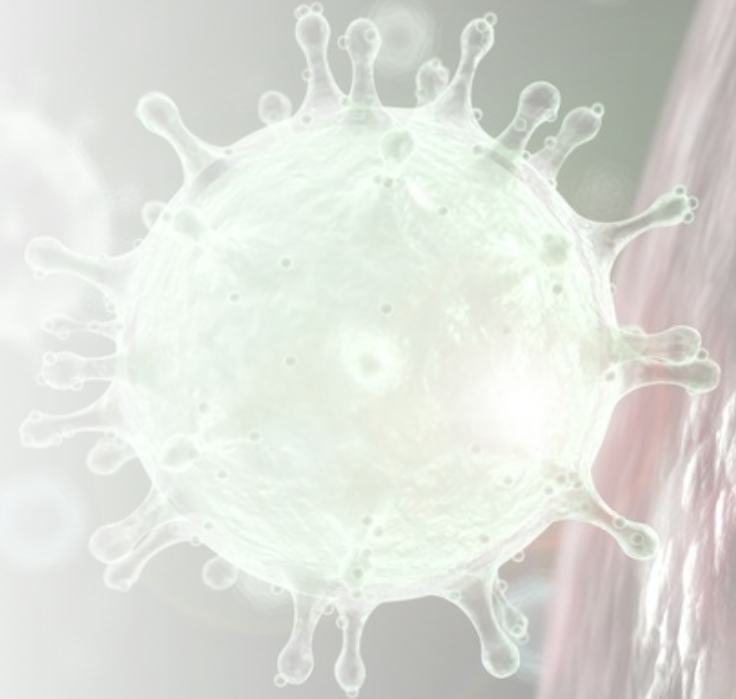
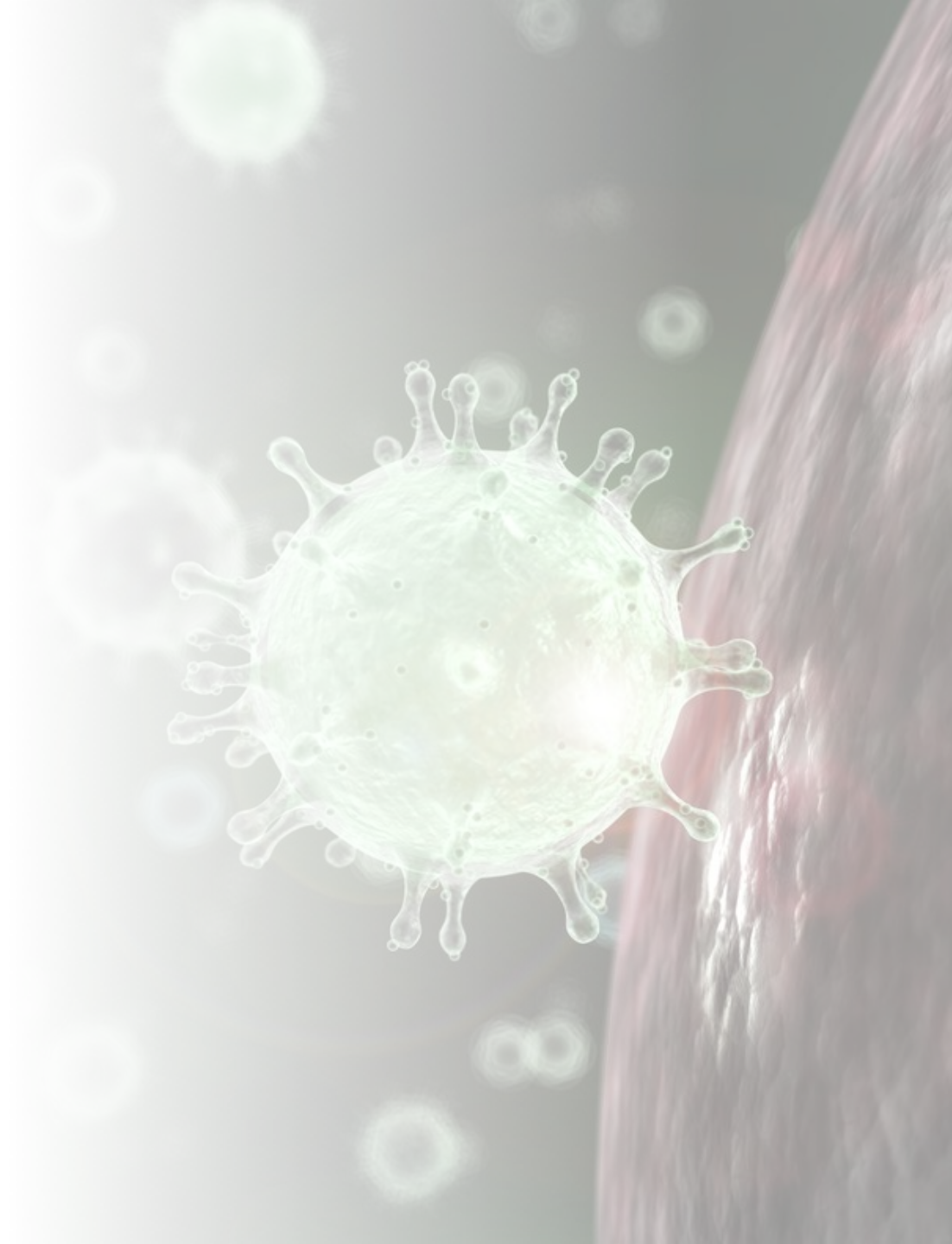


TOGETHER BEYOND COVID19

April 2020



INTRODUCTION



Foreword

The experience we are living through because of the epidemic CoVid19 is definitely new and unexpected for most of us.

Only people who were kids or teens during World War 2 have lived an experience in a some way comparable to the current one for its effects on the social fabric and on the collective psyche.

So far the likely unconscious perception of many XXI century people was that such epidemics belonged to the past times and couldn't occur in a modern and «scientific» world like the one we are living in.

Let aside the actual seriousness of this epidemic (only in the future years it will be possible to compare its effects vs. the ones of other pandemic, such as the ones of Spanish Influenza), **it is certain that the decisions taken by many governments across the world to tackle the epidemic CoViD19 have definitely upset our habits, our daily life, our social relationships, the very way of working of many people, not only for the present time but likely for the future too.**

The results presented in this study (conducted by The Research Alliance network - <https://www.research-alliance.com/>) intend to show briefly under which aspects behaviors and habits of people living in different countries of the world (Australia, Italy , KSA, UAE, UK, USA) have changed and will likely change in the future.

The results of this international survey provide a picture of a world that will go slowly back to “normality” and that likely will change part of its behaviors and habits.

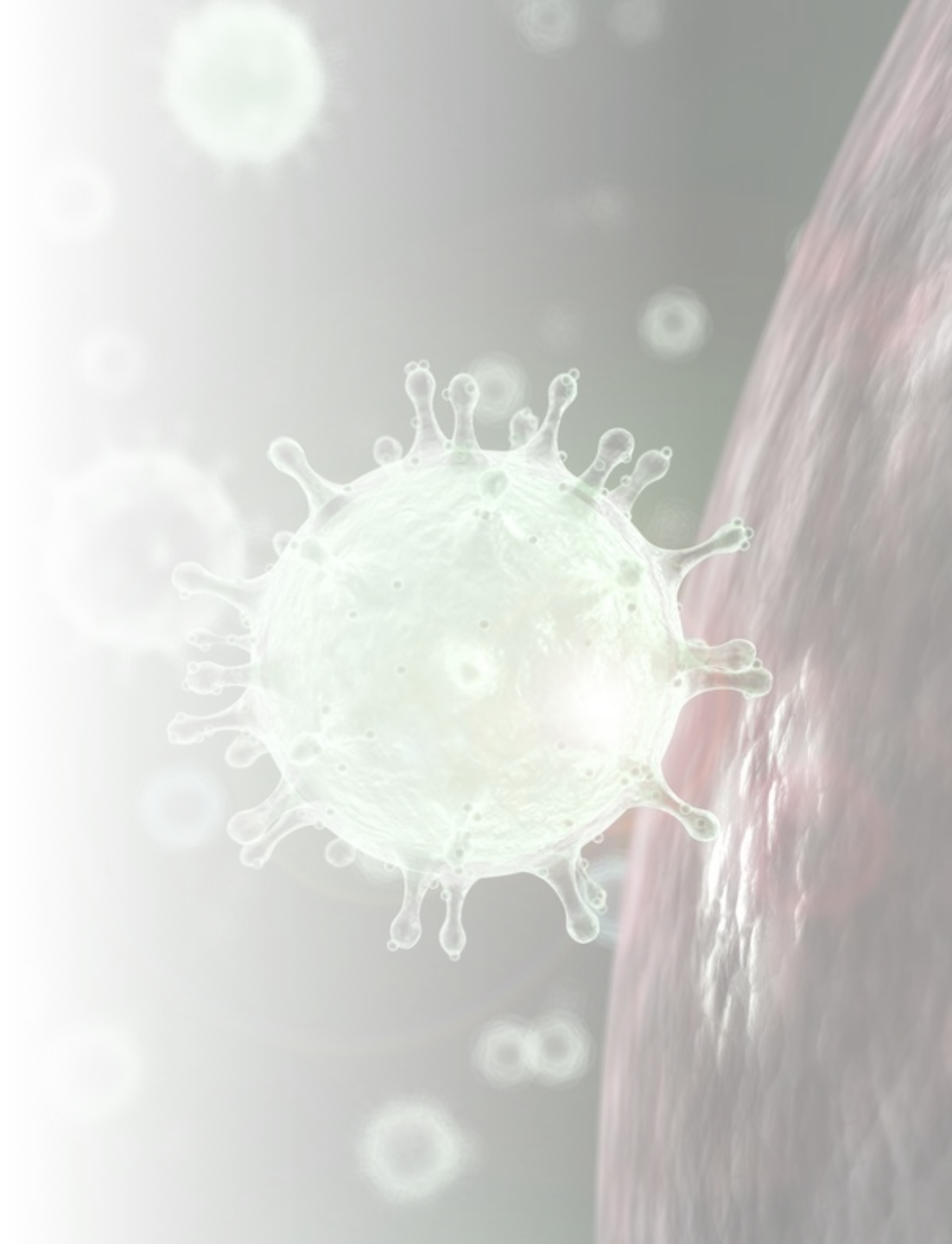
The purpose of this study is to provide to Companies, Media or Institutions just hints on the issues that should be probed in future in-depth ad-hoc studies in order to get detailed information aimed to cope efficiently with the incoming and changing world scenario.

T. R. A.



THE
RESEARCH ALLIANCE

MAIN LEARNING



Global learning

This study has been conducted in **six countries** and some questions have not been put in two of them, so the learning we will talk about are referred only to few markets.

Anyway, due to the fact that this epidemic has stricken the collective unconscious of the world population (more than two thirds of respondents in each country are fearful to get infected), we deem that these learning can be applied also to the rest of the countries infected by CoViD19.



ECONOMIC

There is a general perception (felt by more than two thirds of respondents) that **SME's and families are the subjects that will suffer more** from this epidemic and from the subsequent decisions of the government aimed to contain it. **Actually the large majority of respondents think that the current crisis will be worse than the 2008 financial one.**

In our opinion the overall effects of this crisis will likely affect also the political situation in some country or the relationship among countries, as it happened in 2008/9

MOBILITY

In order to prevent the infection, most of respondents do not use public transportation and a significant share of them (from 23% to 63%) work from home.

This is a behavior that, in our opinion, could continue partially even after the crisis is over, (fear of getting infected won't disappear soon), i.e.. an issue that both public administration and private companies should seriously take into consideration and study before proceeding to future initiatives

Actually many respondents state that even in the future they will work more from home.



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Global learning



SHOPPING

Is not unexpected that in a period of lockdown respondents have increased their purchase of categories more linked to the necessity of

- staying at home: food, beverage, household products
- personal and house care: household products, personal care, medicines

In this period many respondents have changed their shopping behavior and tend to do their shopping of the above products through local pick-up (less significant in the UK) or online.

In our opinion local pick-up is a service that retail could carry on in a systematic way even in the future

SOCIAL ACTIVITY

No surprise that eating out and shopping of travels and vacations dramatically decreased, but it is noteworthy that many respondents (in some cases around 50%) state they will reduce in the near future (or even forever) eating out, travels for vacations, going to cinema, malls, etc.

Take away should probably be one of the services to be implemented by restaurants at least in the short term

On the other side a similar share of respondents say that eating out and planning travels and vacations are among the first things they will do when the crisis will be over

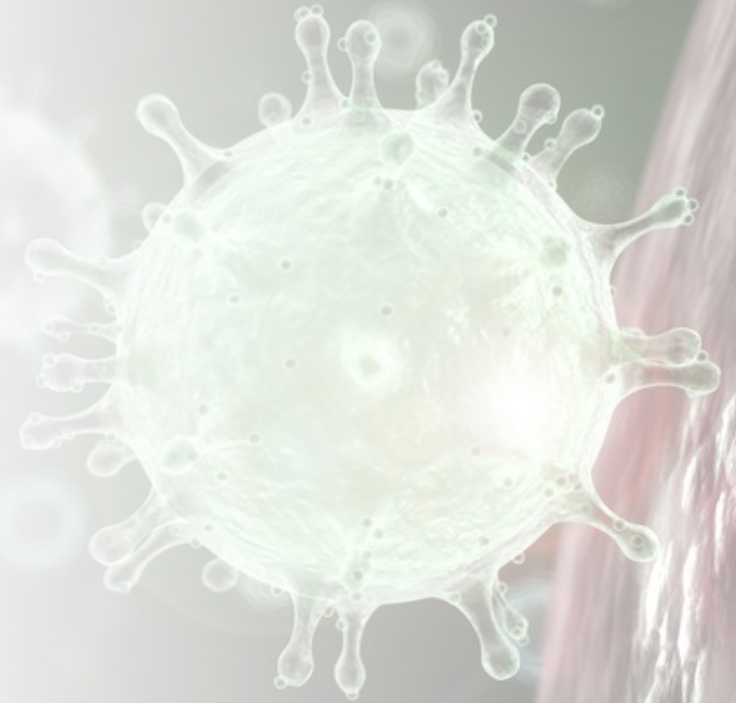


COUNTRY EXECUTIVE SUMMARY

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- **6/10** of those sampled were **fearful** that they would catch Covid 19 virus.
- They were however **satisfied (85%) with the decisions that the Government has made** to contain the virus.
- **9/10 claim to be taking precautions** to avoid being infected with the main precautions being increased levels of washing/sanitising their hands, not going out unless necessary and avoiding crowded places – all of which are the key messages of the Government campaigns.
- Bars/restaurants, clothes/shoes shops and travel/holidays have seen the biggest decline due to the epidemic with **only food and household products seeing an increase**.
- The majority (86%) think that it will take a year or more for life to return to “normal” and that the impact of Covid 19 epidemic will be worse than the 2008/9 GFC (81%).
- It will take a long time for people to go back their “usual” behaviour for social gatherings, eating out/going to the cinema and going to large events/concerts.
- The first three things they are likely to do when restrictions are lifted are “go out with friends”, “go to restaurants” and “plan travel/trips”.
- That said they don’t have big plans on spending money when this is all over with a third saying they will not buy anything and a further third saying they don’t know what the buy first thing they will buy when the emergency is over.

Sample = 1,100 members of the Red Galah consumer panel were surveyed in w/c 13th April 2020. The sample is predominately Sydney based



- Approx. **6/10** of Italians are **fearful** that they would catch CoViD19.
- **3/4** are **satisfied with the decisions taken by the Government** to contain the virus.
- According to respondents, **mainly SME's (70%) and families (65%) will suffer economically because of the lockdown**. Large companies and corporations are expected to be able to overcome this crisis with no serious consequence.
- **75%** of those working in manufacturing, distribution, retail or service industries deem that **the company they work for will experience a decrease in revenue in the next 12 months**.
- According to **77%** of respondents **the current crisis due to CoViD19 will be worse than the 2008 financial one**.
- **Almost all respondents (94%) are taking precautions to avoid the infection**: mainly usage of the mask and going out only when strictly necessary.
- One can remark **an increase of purchases of food and household products** in this period, and a decrease of purchases regarding bar/restaurant, travels and clothes.
- The way to purchase food has changed: **many more purchases online and local pick-up**.
- Great majority of Italians (**86%**) deem that **it will take a long time before being able to go back to normal life**.
- **The first things** respondents are likely to do when the lockdown will be over are: **“meet their relatives” (37%), “have a walk” (37%), “go out with friends” (33%), “go back to their routine” (33%)**.
- Respondents are quite uncertain about the first thing they would like to buy after the lockdown: 24% will buy clothes, but 47% state they don't know.
- The current emergency will surely change habits and behaviors of Italians in the next months: **it will take time before many respondents will go to cinema, restaurant or other types of crowded places**

Kingdom of Saudi Arabia



- 67% of those sampled were **fearful** that they would catch the COVID-19 virus.
- 74% feel that **families will suffer more** on an economic plan from this epidemic and the subsequent initiatives to contain it followed by SMEs (65%).
- Only 24% claimed to be optimistic and sees economy to rebound within 2-3 months & grow just as strong or stronger than before COVID-19
- 48% claimed that their income has been impacted by COVID-19 and 69% claimed to start cutting back their spending due to uncertainty
- 98% claimed to be taking precautions to avoid being infected with the main precautions being increased levels: reduced social activities (not going out unless necessary), avoiding public transportation, buying medical mask
- Sampled claimed to reduce their spending on the following categories: Bar/restaurant, Travel/vacation, Clothes/shoes, Furniture/domestic appliances
- The categories sampled claimed to increase their spending's are: Food, Household products, Beverages
- 2/3rd of sampled claimed to have a life back to normal in several months to more than a year time
- The first three things they are likely to do when restrictions are lifted are: Go back to routine, Go out with friends, Go back to work
- 44% claimed to clothes/shoes when the emergency is over followed by 25% who are not sure due to uncertainty

United Arab Emirates



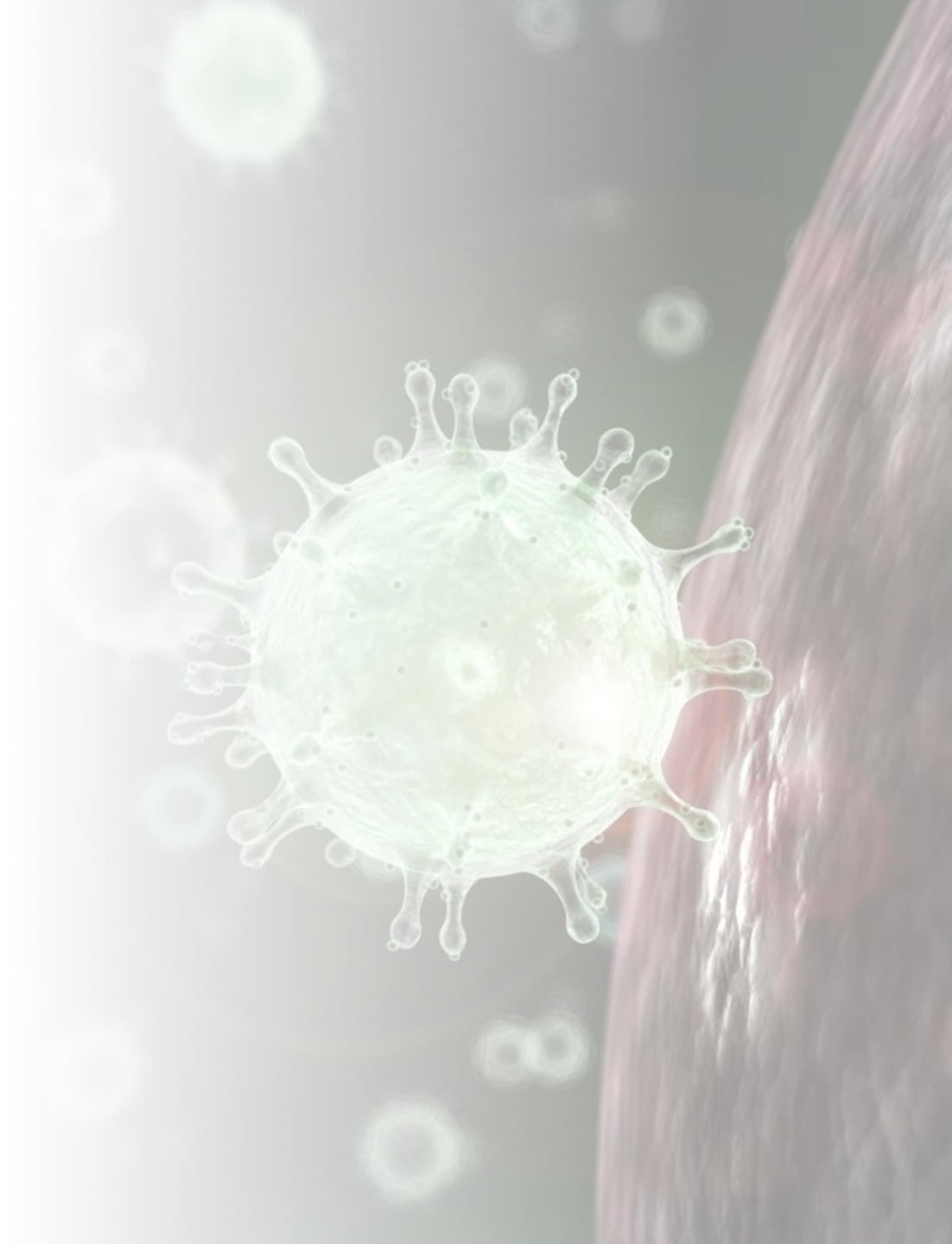
- 78% of those sampled were **fearful** that they would catch the COVID-19 virus.
- 69% feel that **families will suffer more** on an economic plan from this epidemic and the subsequent initiatives to contain it **followed by SMEs (56%)**.
- **Only 22% claimed to be optimistic** and sees economy to rebound within 2-3 months & grow just as strong or stronger than before COVID-19 as majority 53% are unsure.
- **56% claimed that their income has been impacted by COVID-19** and 63% claimed to start cutting back their spending due to uncertainty
- When asked on **behavior change implemented to prevent**, large majority **87% are leaving home when really necessary** with **82% wont go to crowded places**. Also **79% buying medical masks and avoiding public transportations**. Interestingly, only 61% of the sampled respondents mentioned working from home that reflects government policy for 30% staff permitted to work. Interesting behavior shift that is not implemented by everyone in the country.
- Sampled claimed to reduce their spending on Travel/Vacations (81%), Bar/restaurant (72%), Clothes/shoes (61%), Furniture/domestic appliances (45%) and Beverages (34%)
- The categories sampled claimed to increase their spending's are Food (46%) and Household products (44%).
- **64% of the residents felt that it will take few months to several months to have a life back to normal**. Interestingly, 26% of residents felt it would take more than a year time for things to get back to normal.
- When asked for **the first three things** they are likely to do when restrictions are lifted, **54% would go out with friends and get back to routine** and **38% indicating to meet families**. While only 31% choose as going to the restaurant or gym/cinemas did not seem to be high priority activities.
- 44% claimed to buy clothes/shoes when the emergency is over followed by 13% who would register at a Gym.

- Almost **three-quarters** of people in the UK **fear** being infected, less so among men and <25s
- People are though broadly satisfied with the UK government's response (including those who fear being infected)
- **SMEs are felt to most likely to suffer economically due to the pandemic (80%)**, followed by individual families (64%). Large companies and corporations are expected to weather the storm (only 27% feel they will suffer more)
- The economic outlook is gloomy with **62%** of those working in manufacturing, distribution, retail or service industries believing **the company they work for will experience a decrease in revenue in the next 12 months**
- In the UK the feeling is that **this will be much worse (43%) than the financial crisis of 2008/9**
- **Three quarters (76%) have implemented a change in personal behaviour**, broadly reflecting the current lockdown in the UK with avoiding public transport, crowded places and only leaving home when necessary being the key changes
- **Almost 2 in 5 people (39%) have reduced their shopping occasions**, especially bars/restaurants (70%), holidays (55%) and clothing (54%) however this is likely to be a reflection of the lockdown and future uncertainty rather than a lack of desire (products easily purchased online like telecoms, durables are holding up better than others)
- In the UK **we're not expecting a return to 'normal' life anytime soon with over three-quarters saying it will be at least several months** (and over 2 in 5 saying a year or more). Are the young in the UK optimists or living in blissful ignorance? 1 in 10 of 18-24s feel normality will return in just a few weeks (vs 2% of the population)
- **What do we miss the most? Our loved ones.** When the emergency is over **the most important things** we look forward to are **meeting up with family (59%) and going out with friends (38%)**
- **COVID-19 may well drive a more cautious behaviour in us well beyond lockdown**, 38% will avoid large events/gatherings and 33% reduce eating out or going to cinemas/shopping centres for a while before returning to their usual behaviour
- Despite this men need to be alert though, almost 1 in 5 (18%) of women say buying clothes or a pair of shoes will be the first thing they buy when this is over

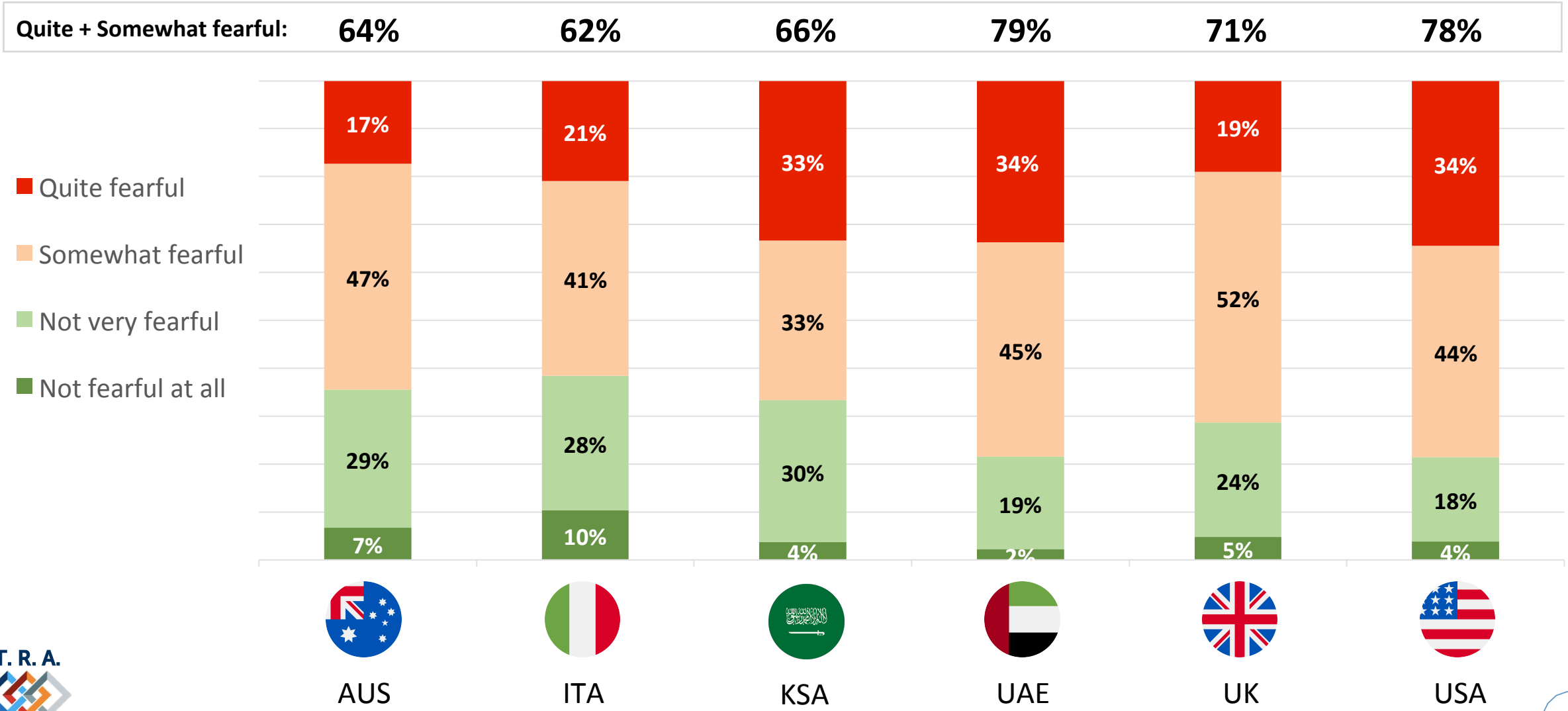


- **8/10** of Americans sampled were **fearful** that they would catch the Covid 19 virus
- Potentially influenced by **modest levels of satisfaction (63%) with the decisions that the Government has made** to contain the virus
- **9/10 claim to be taking precautions** to avoid being infected with the main precautions being, Not going out unless necessary and avoiding crowded places and public transportation
- Bars/restaurants, travel/holidays , and clothes/shoes shops have seen the biggest decline due to the epidemic with half mentioning **an increase in shopping for food and household products, followed by household products**
- Three quarters (75%) think that it will take several months to a year or more for life to return to “normal” and that the impact of Covid 19 epidemic will be worse than the 2008 / 9 GFC (73%)
- **Nearly half plan to continue social distancing for a while** before reverting to their pre-pandemic behavior, especially avoiding large gatherings, avoiding eating out, malls, and cinemas, and traveling for vacations
- **The first three things** they are likely to do when restrictions are lifted are **go to restaurants, meet family members, and go out with friends**
- A third don't have big plans on spending money when this is all over saying they don't know what they will buy. One in four will plan a holiday / vacation

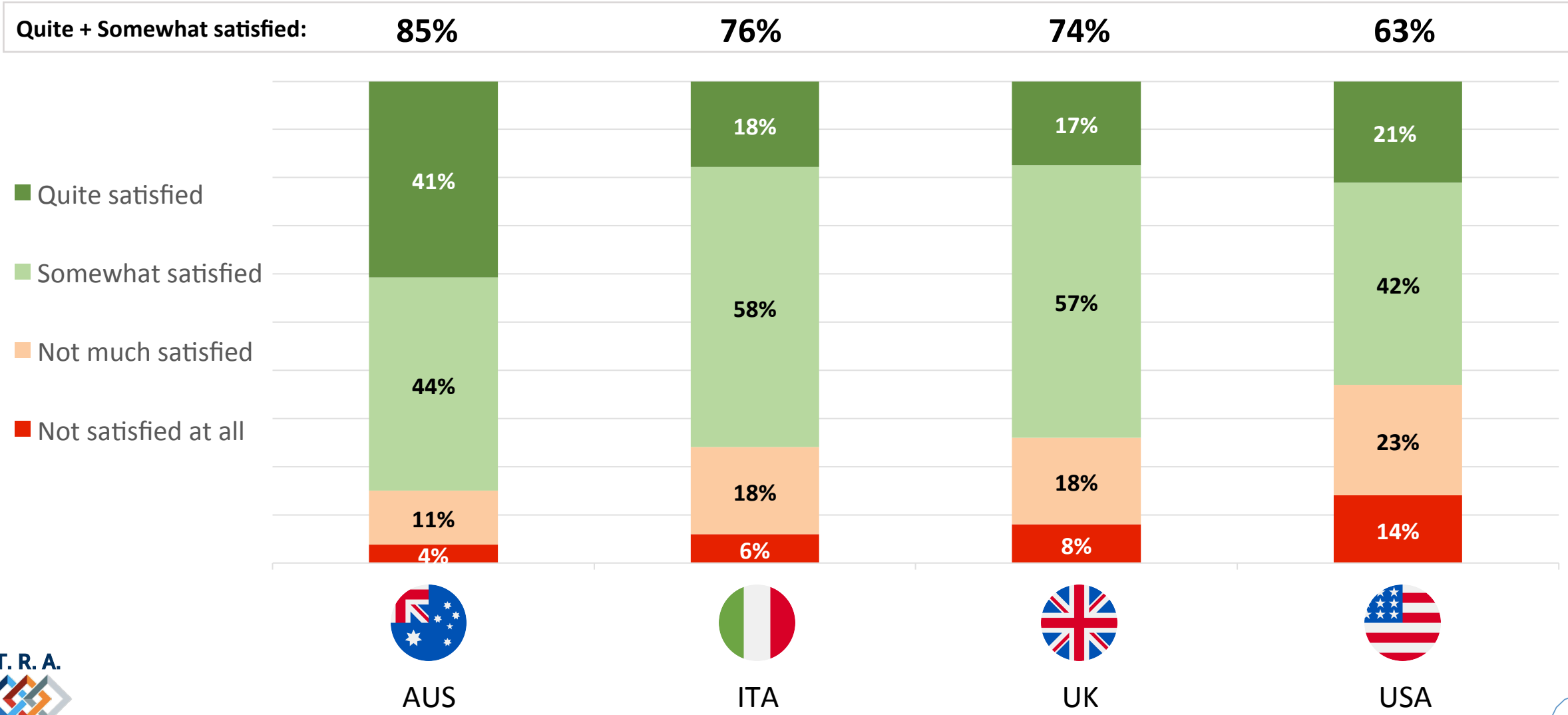
MAIN RESULTS



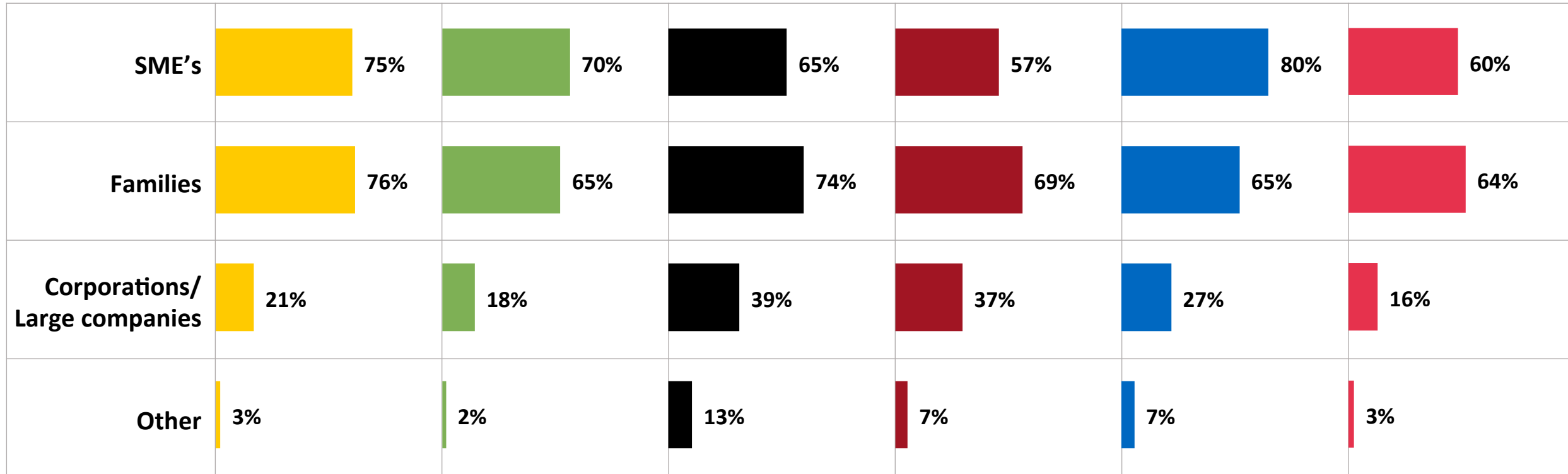
At what extent do you fear to be infected by CoronaVirus?



Are you satisfied with the decisions of the government aimed to contain the CoronaVirus epidemic?



In your opinion who will suffer more on an economic plan from this epidemic and the subsequent initiatives to contain it?*



AUS



ITA



KSA



UAE



UK



USA

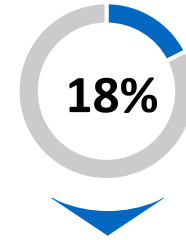
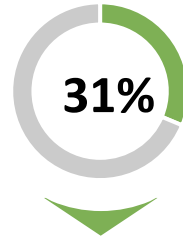


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*POSSIBLE MULTICODE

Do you work in a company (manufacture, services, distribution, retail, etc.)? In your opinion which will be the impact of this epidemic on your company revenue in the course of the next 12 months?

Yes:



Big decrease of my company's revenue	38%	Decrease 76%	36%	Decrease 74%	30%	Decrease 63%	36%	Decrease 75%
Some decrease of my company's revenue	38%		38%		33%		39%	
No variation of my company's revenue	10%		15%		16%		10%	
Some increase of my company's revenue	4%	Increase 8%	4%	Increase 6%	7%	Increase 11%	5%	Increase 8%
Big increase of my company's revenue	4%		2%		4%		3%	
Don't know	6%		6%		10%		6%	



AUS



ITA



UK



USA

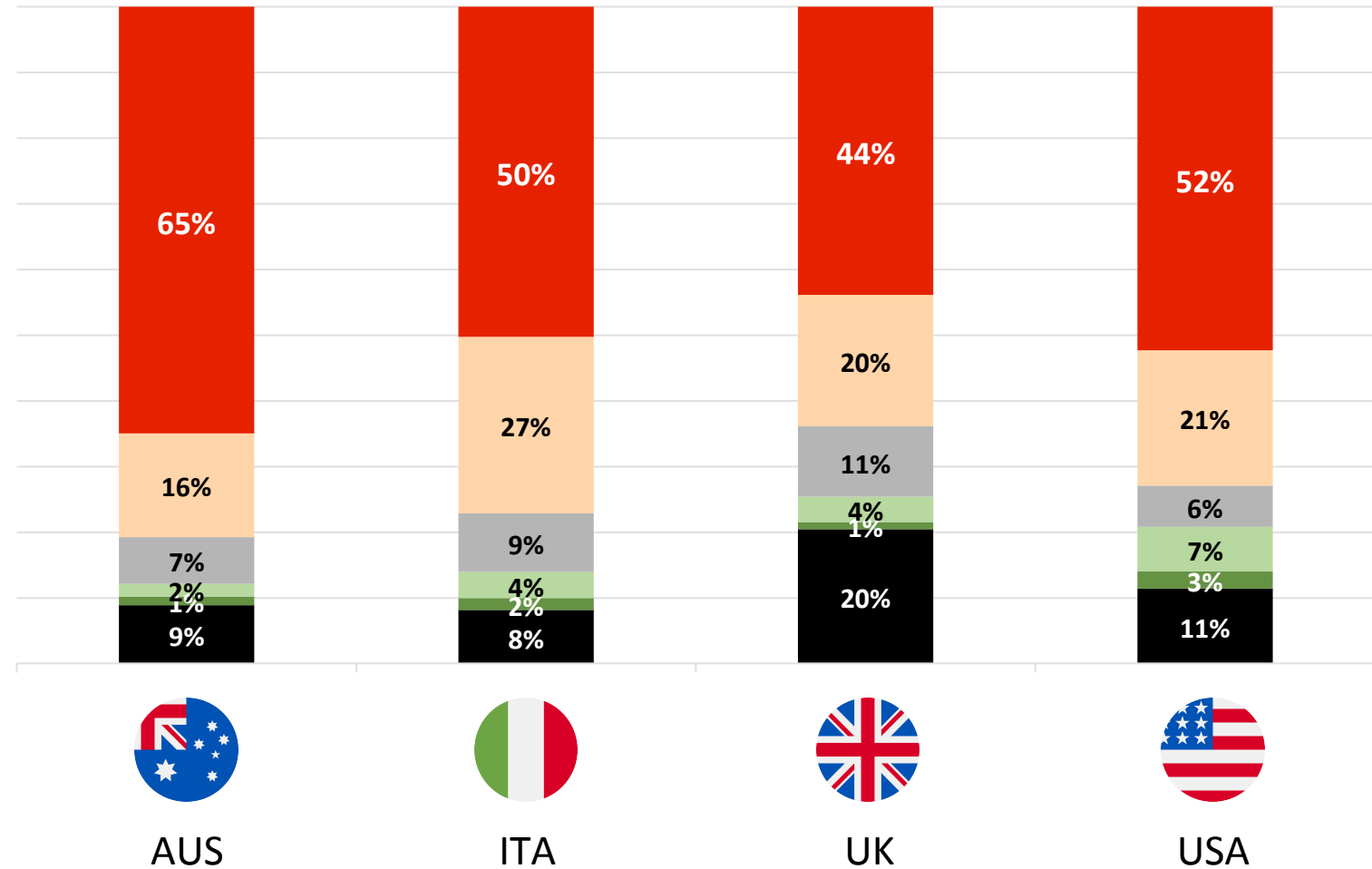
Question not put in UAE and KSA

Comparing the economic impact on your life caused by the 2008/9 financial crisis to the one that the current CoronaVirus epidemic could cause in the future, which is your opinion among the following ones?

Much worse + A little worse than 2008/9 crisis: **81%** **77%** **64%** **73%**

Possible economic crisis caused by coronavirus epidemic will be...

- Much worse than 2008/9 financial crisis
- A little worse than 2008/9 financial crisis
- No difference vs. 2008/9 financial crisis
- A little better than 2008/9 financial crisis
- Much better than 2008/9 financial crisis
- Don't know



Are you implementing personal behaviors aimed to prevent the infection? Which ones?*



I go out from home only when really necessary	91%	75%	89%	89%	84%	85%
I don't/won't go into crowded places	84%	70%	87%	86%	84%	82%
I don't/won't use public transportation	67%	52%	74%	81%	72%	75%
I bought/I will buy a medical mask	31%	82%	70%	82%	23%	68%
I am working from home	42%	23%	55%	63%	26%	37%
Other	3%	3%	0%	5%	6%	4%



AUS



ITA



KSA



UAE



UK

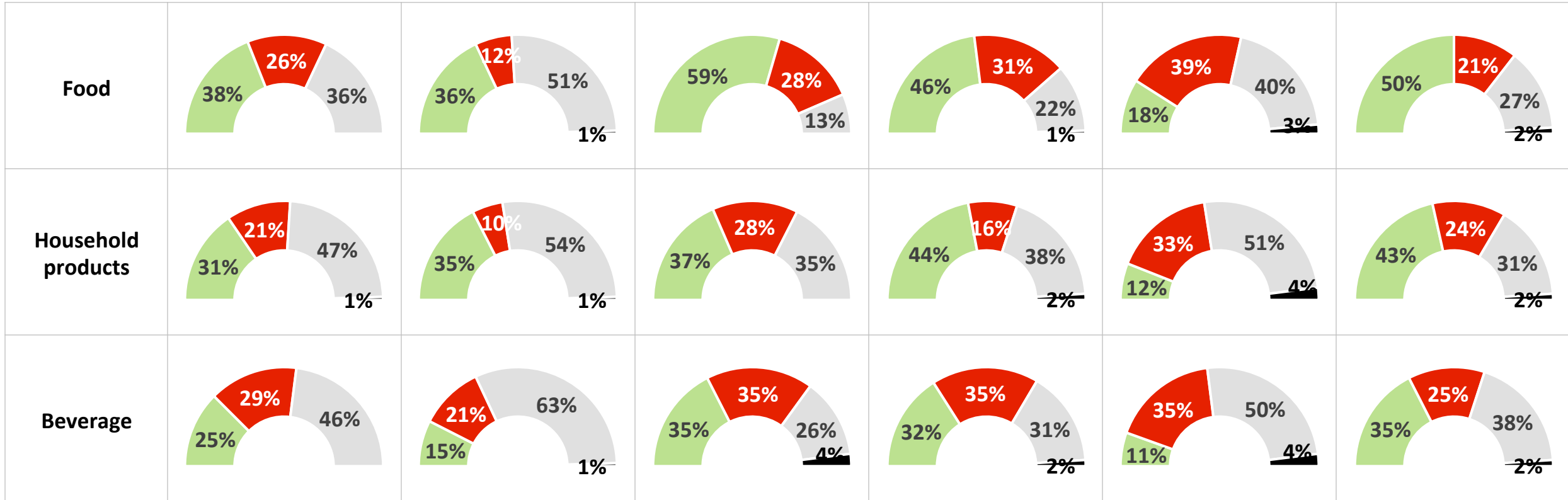


USA

For each of the below types of goods/services could you please specify whether your shopping occasions increased, decreased or didn't change in the last weeks?

1/4

■ Increase
 ■ Decrease
 ■ No Variation
 ■ Don't know



AUS



ITA



KSA



UAE



UK



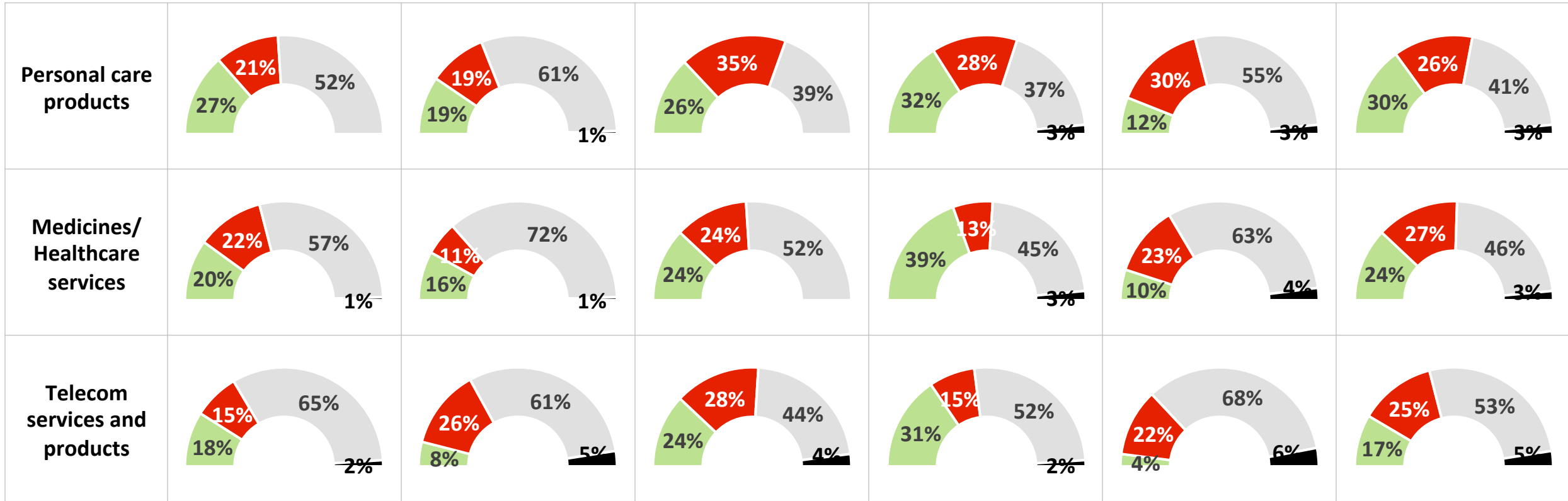
USA



For each of the below types of goods/services could you please specify whether your shopping occasions increased, decreased or didn't change in the last weeks?

2/4

■ Increase
 ■ Decrease
 ■ No Variation
 ■ Don't know



AUS



ITA



KSA



UAE



UK



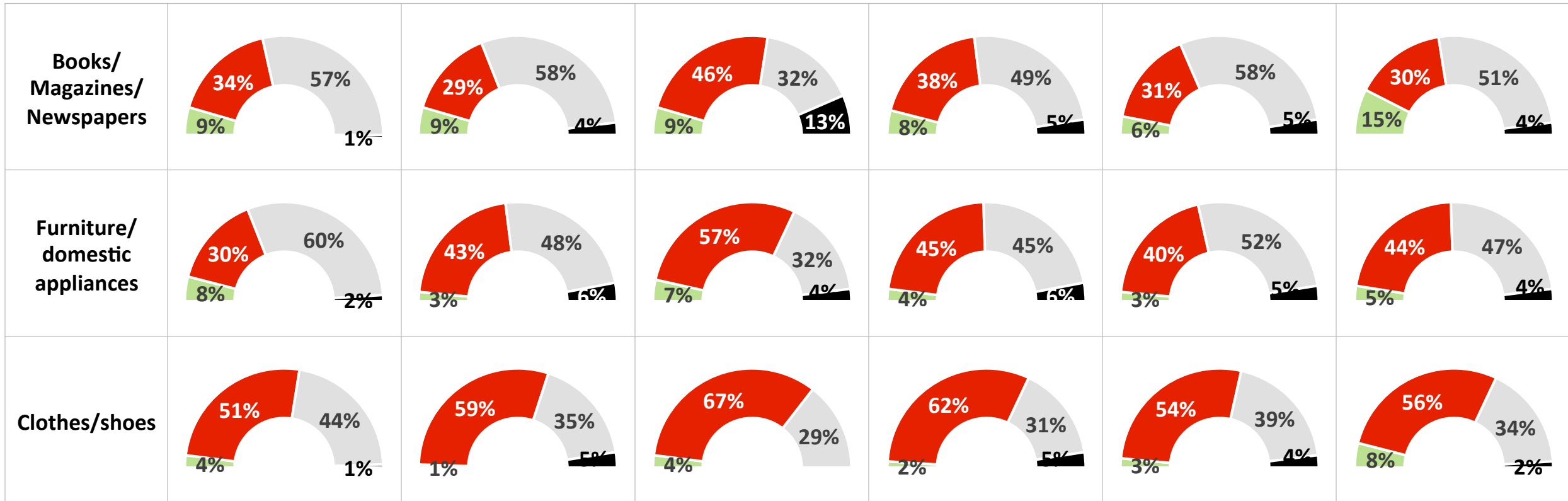
USA



For each of the below types of goods/services could you please specify whether your shopping occasions increased, decreased or didn't change in the last weeks?

3/4

■ Increase
 ■ Decrease
 ■ No Variation
 ■ Don't know



AUS



ITA



KSA



UAE



UK



USA

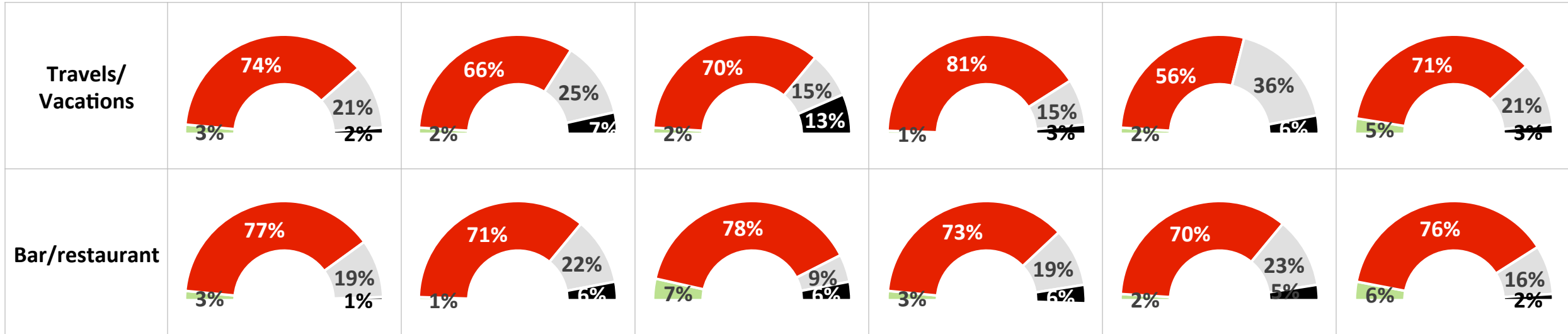


THE RESEARCH ALLIANCE

For each of the below types of goods/services could you please specify whether your shopping occasions increased, decreased or didn't change in the last weeks?

4/4

■ Increase
 ■ Decrease
 ■ No Variation
 ■ Don't know



AUS



ITA



KSA



UAE



UK



USA



For each of the below types of goods/services could you please specify whether your shopping occasions increased, decreased or didn't change in the last weeks?

% INCREASE

	AUS	ITA	KSA	UAE	UK	USA
Food	38%	36%	59%	46%	18%	50%
Household products	31%	35%	37%	44%	12%	43%
Beverage	25%	15%	35%	32%	11%	35%
Personal care products	27%	19%	26%	32%	12%	30%
Medicines/Healthcare services	20%	16%	24%	39%	10%	24%
Telecom services and products	18%	8%	24%	31%	4%	17%
Books/Magazines/Newspapers	9%	9%	9%	8%	6%	15%
Furniture/domestic appliances	8%	3%	7%	4%	3%	5%
Clothes/shoes	4%	1%	4%	2%	3%	8%
Travels/Vacations	3%	2%	2%	1%	2%	5%
Bar/restaurant	3%	1%	7%	3%	2%	6%



AUS



ITA



KSA



UAE



UK



USA

For each of the below types of goods/services could you please specify whether your shopping occasions increased, decreased or didn't change in the last weeks?

% DECREASE

Bar/restaurant	77%	71%	78%	73%	70%	76%
Travels/Vacations	74%	66%	70%	81%	56%	71%
Clothes/shoes	51%	59%	67%	62%	54%	56%
Furniture/domestic appliances	30%	43%	57%	45%	40%	44%
Books/Magazines/Newspapers	34%	29%	46%	38%	31%	30%
Beverage	29%	21%	35%	35%	35%	25%
Food	26%	12%	28%	31%	39%	21%
Personal care products	21%	19%	35%	28%	30%	26%
Household products	21%	10%	28%	16%	33%	24%
Medicines/Healthcare services	22%	11%	24%	13%	23%	27%
Telecom services and products	15%	26%	28%	15%	22%	25%



AUS



ITA



KSA



UAE



UK

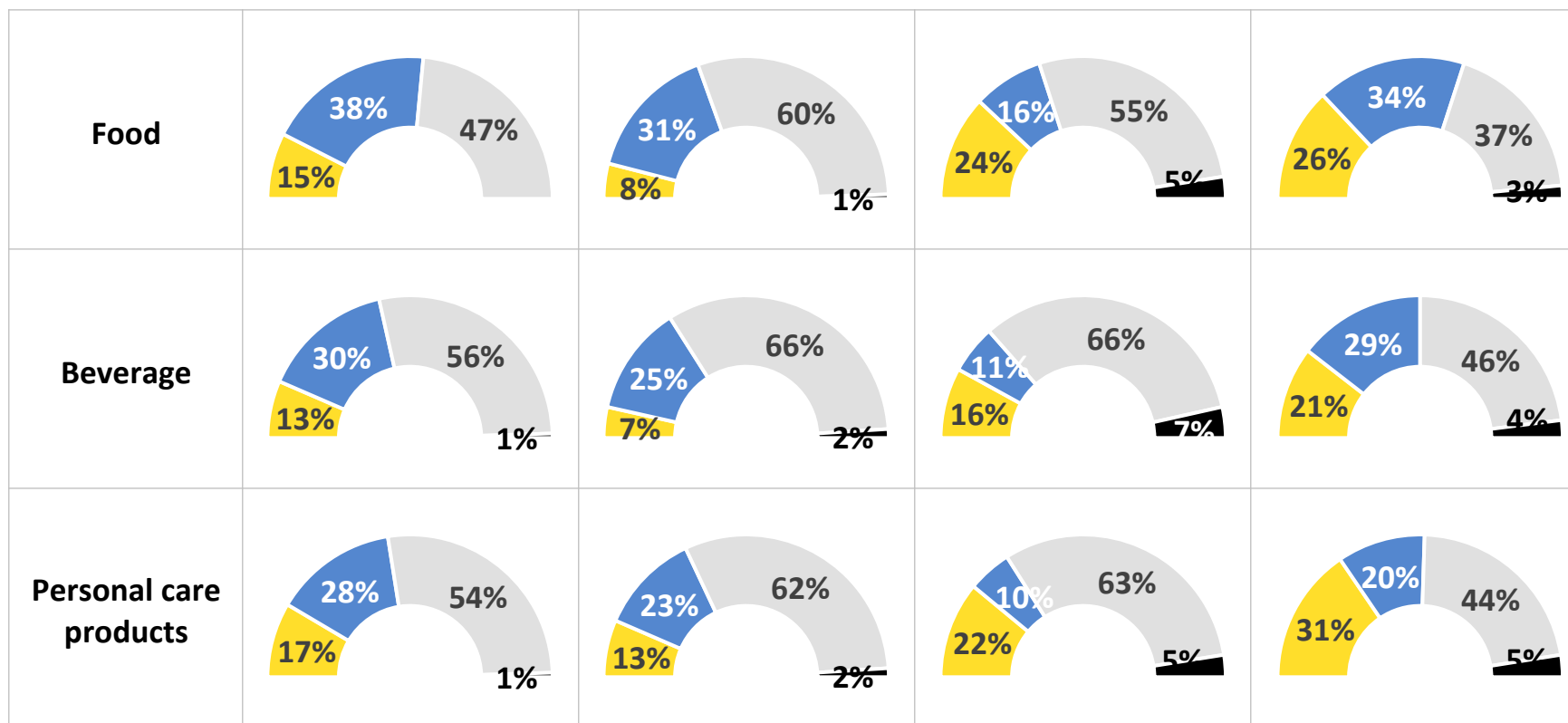


USA

Are you shopping differently for the following types of goods / services?

1/4

■ Shopping more online
 ■ Using local pickup
 ■ No Variation
 ■ Don't know



AUS



ITA



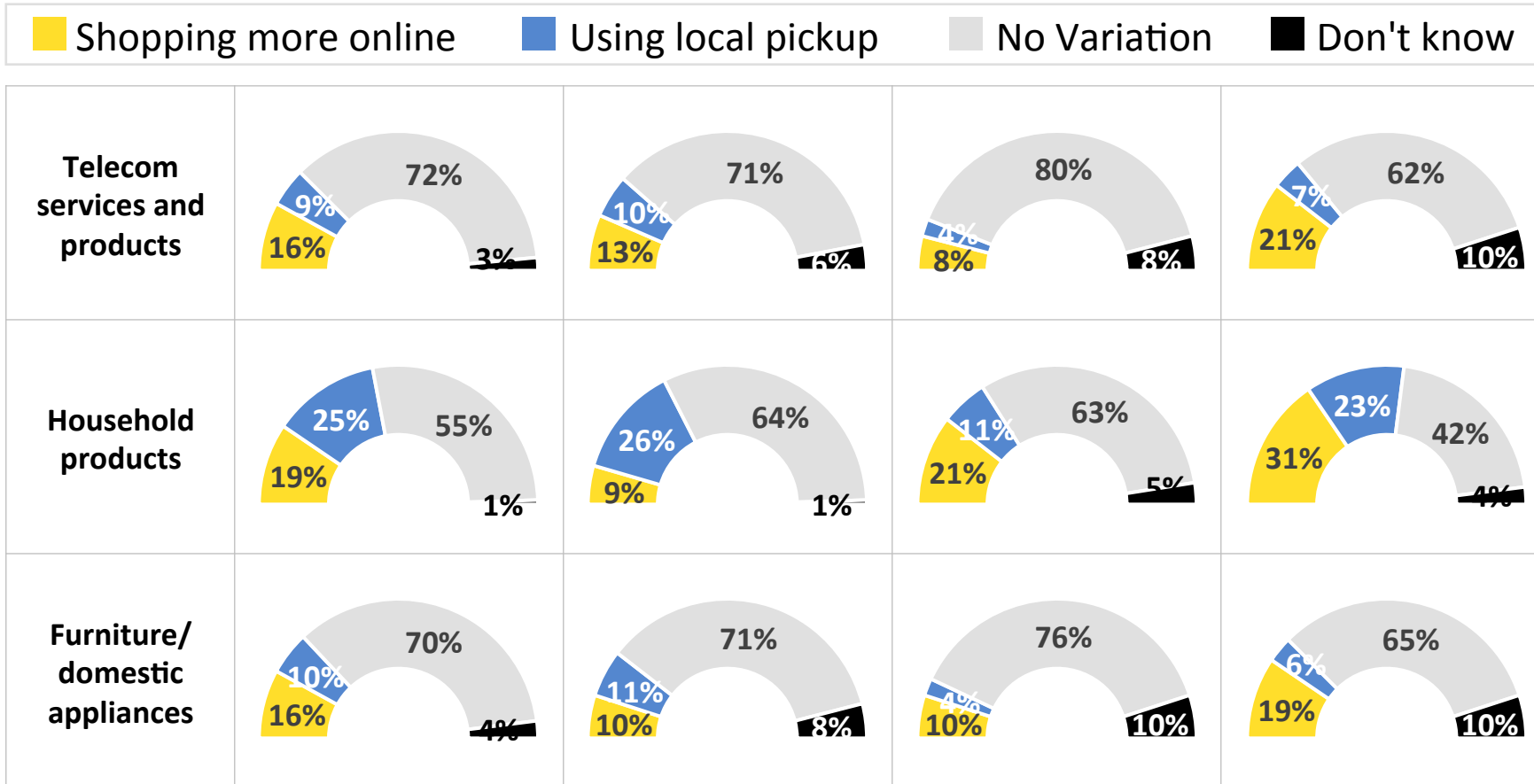
UK



USA

Are you shopping differently for the following types of goods / services?

2/4



AUS



ITA



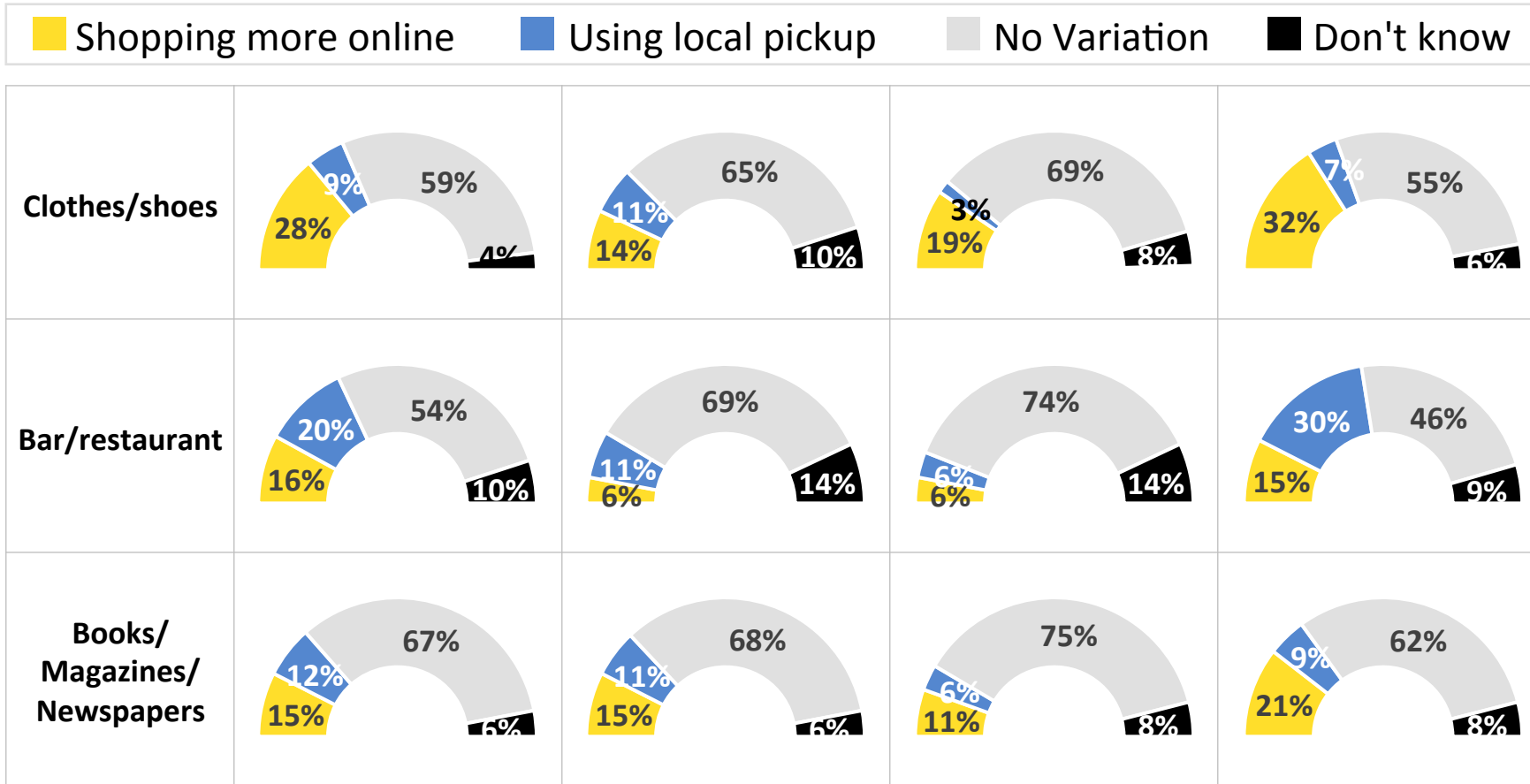
UK



USA

Are you shopping differently for the following types of goods / services?

3/4



AUS



ITA



UK

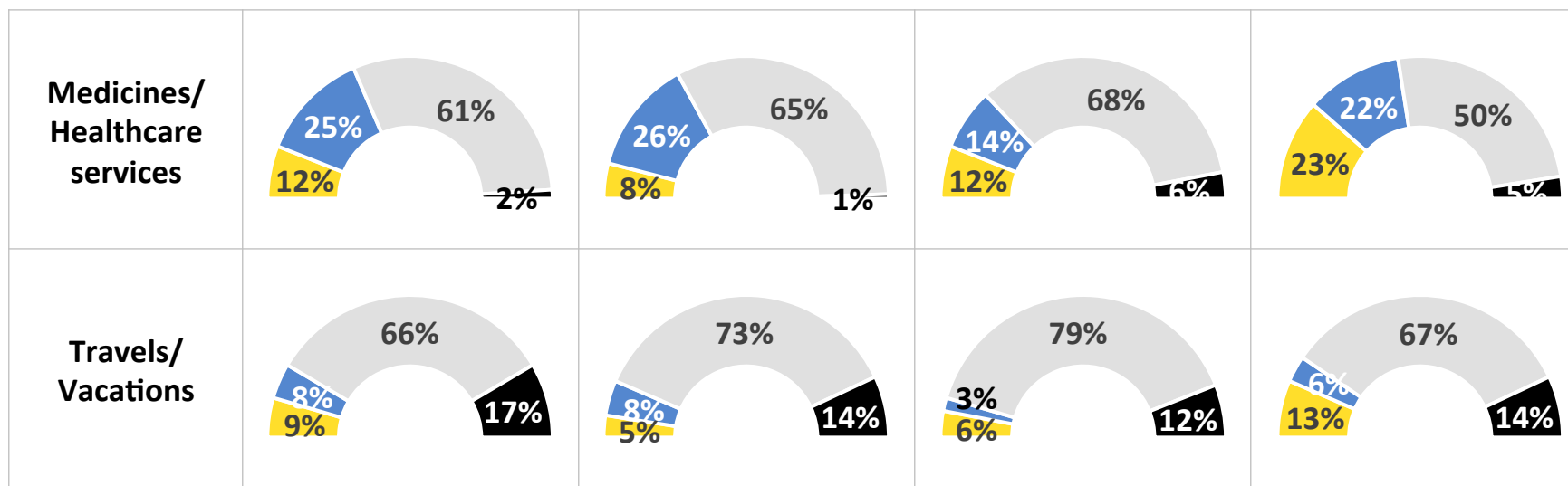


USA

Are you shopping differently for the following types of goods / services?

4/4

■ Shopping more online
 ■ Using local pickup
 ■ No Variation
 ■ Don't know



AUS



ITA

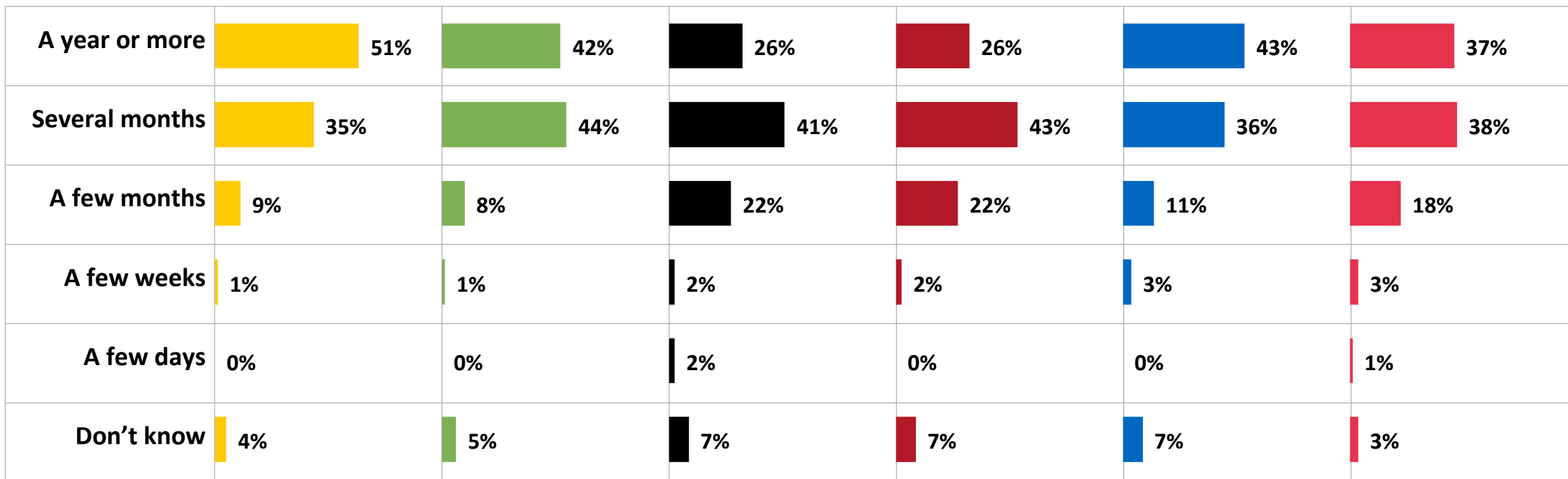


UK



USA

In your opinion how long it will take to go back to normal life?



AUS



ITA



KSA



UAE



UK



USA

Which are the first three activities you will do when this emergency will be over and the general situation will be normal again?*

Stay with/meet the members of my family	51%	37%	41%	38%	59%	41%
Go out with my friends	45%	33%	63%	55%	39%	35%
Go back to my routine	35%	33%	72%	53%	33%	44%
Go to the restaurant	38%	11%	44%	32%	32%	46%
Plan travels and trips	40%	20%	37%	35%	36%	30%
Have a walk	5%	37%	37%	29%	19%	16%
Doing sport/gym	19%	10%	46%	30%	13%	18%
Go to the bar/pub/ice-cream parlor	15%	8%	9%	8%	19%	14%
Go back to my office	13%	13%	48%	33%	11%	21%
Go to cinema/theatre	18%	5%	26%	22%	12%	11%
Other	4%	5%	2%	5%	7%	6%
Don't know	3%	3%	2%	6%	6%	6%



AUS



ITA



KSA



UAE



UK



USA



THE RESEARCH ALLIANCE

* MULTICODE

Which is the first thing you would buy when this emergency will be over and the general situation will be normal again?

Clothes/shoes	17%	24%	44%	24%	14%	16%
Smartphone	2%	3%	2%	5%	3%	5%
Register to a gym	4%	5%	15%	13%	3%	4%
A domestic appliance	2%	3%	0%	2%	3%	4%
Car/Motorbike	2%	2%	2%	3%	3%	4%
A piece of furniture	3%	2%	5%	6%	4%	3%
Whole kitchen	1%	2%	2%	0%	2%	1%
Other	39%*	12%	26%	44%	11%	32%**
Don't know	30%	47%	4%	3%	57%	31%



AUS



ITA



KSA



UAE



UK



USA

T. R. A.



THE RESEARCH ALLIANCE

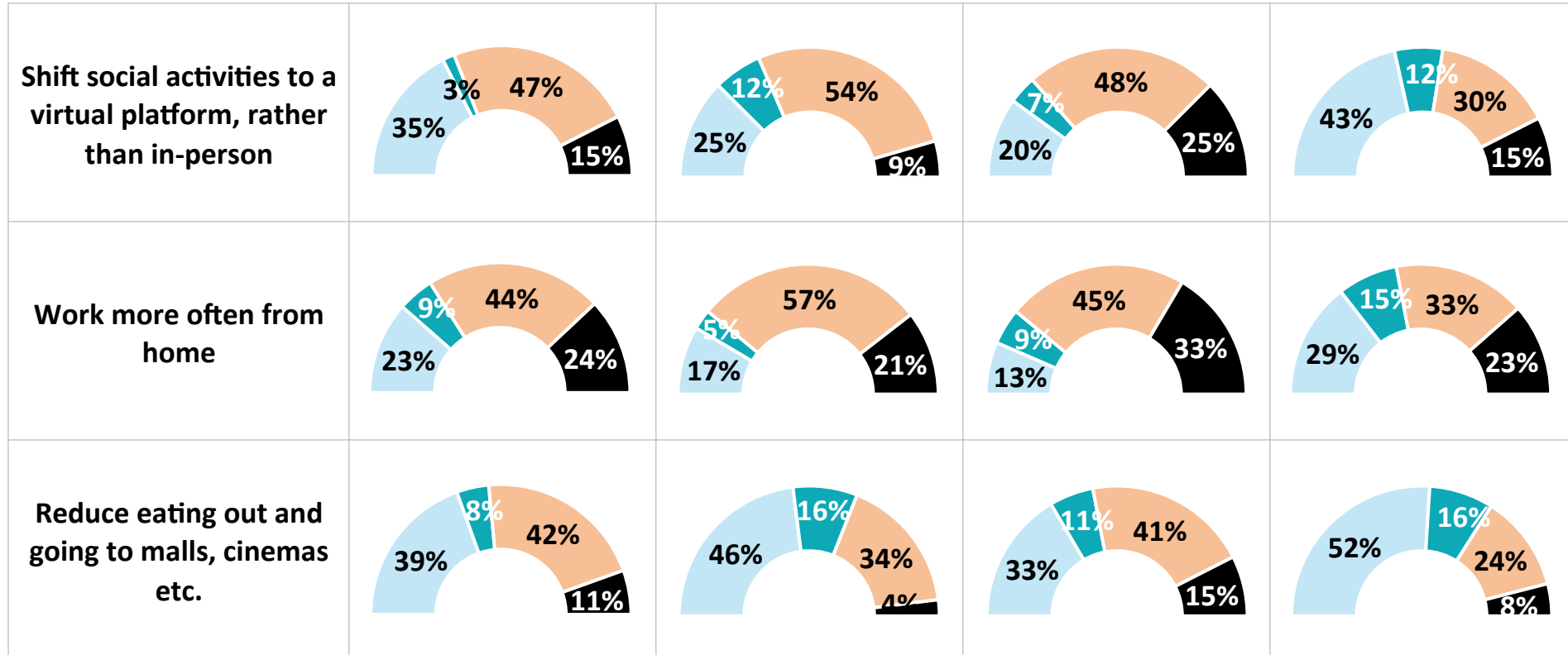
* "Nothing" (35%)

** "Holiday/Travel" (24%)

For each of the below social behaviors could you please indicate how you will change them in the future because of the CoronaVirus epidemic?

1/2

■ I will do it for a while/a long period, then I will go back to my usual behavior
 ■ I will do it forever
 ■ I won't do it/I will behave as in the past
 ■ Don't know



AUS



ITA



UK



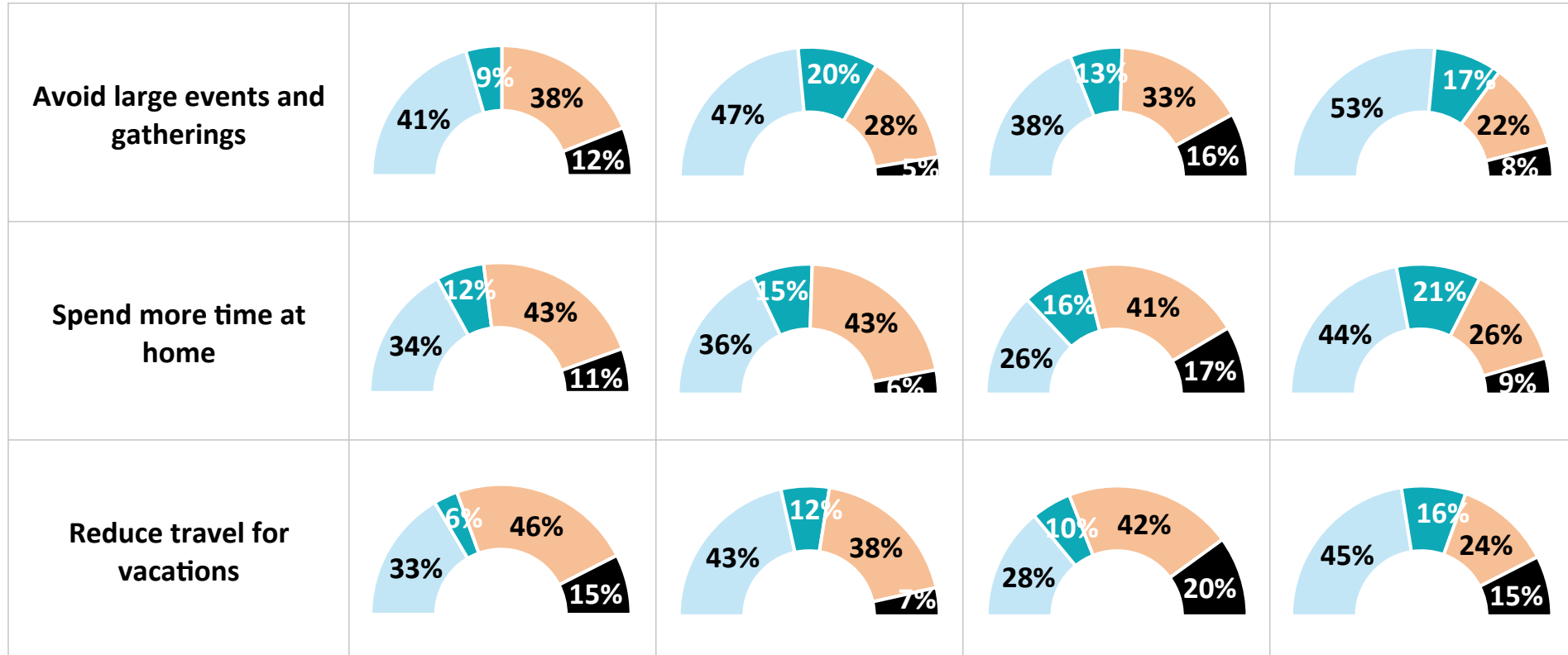
USA

Question not put in UAE and KSA

For each of the below social behaviors could you please indicate how you will change them in the future because of the CoronaVirus epidemic?

2/2

■ I will do it for a while/a long period, then I will go back to my usual behavior
 ■ I will do it forever
 ■ I won't do it/I will behave as in the past
 ■ Don't know



AUS



ITA



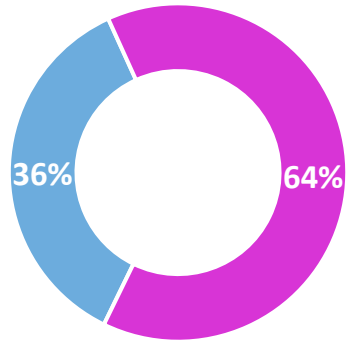
UK



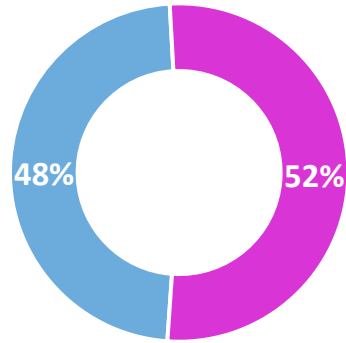
USA

Question not put in UAE and KSA

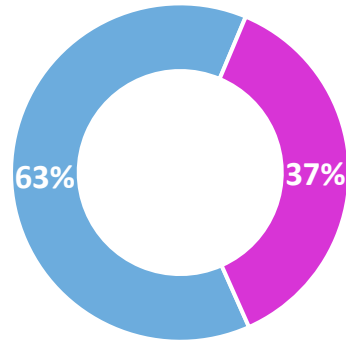
Sample: gender



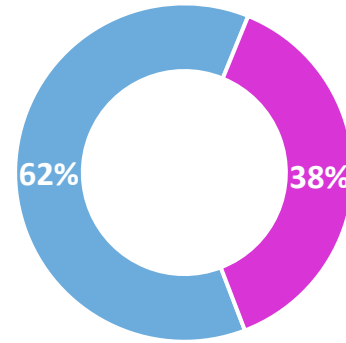
AUS



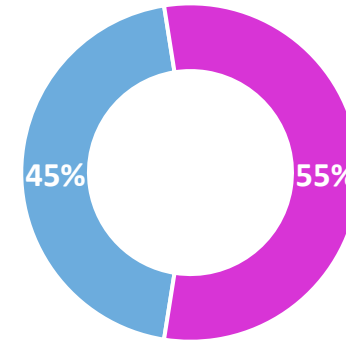
ITA



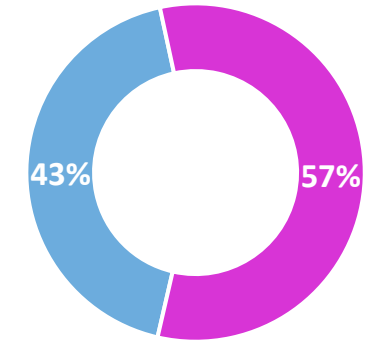
KSA



UAE



UK



USA

Sample:

1.100

502

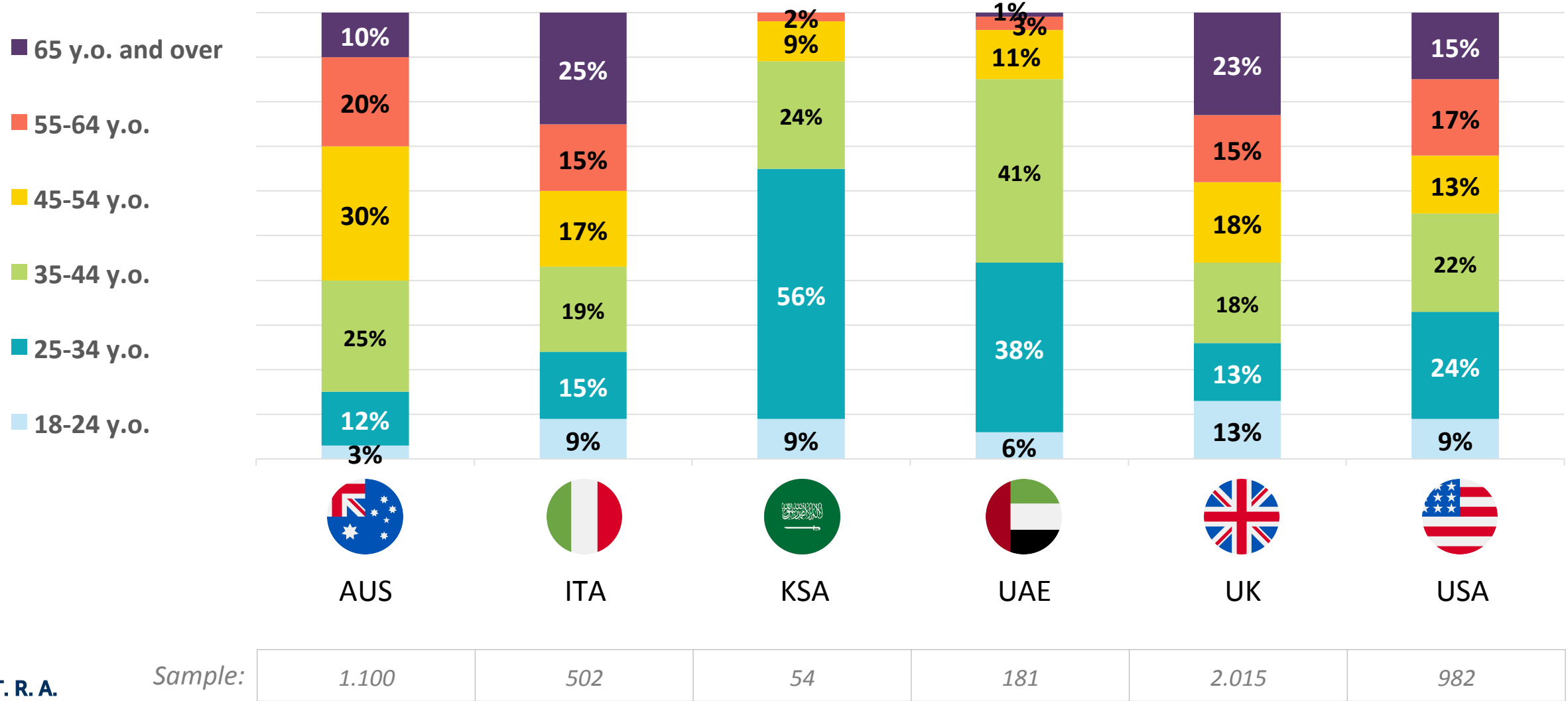
54

181

2.015

982

Sample: age



THANKS FOR YOUR ATTENTION!



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