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COVID-19 Public Sentiment Survey

IRIS Multi-Country Study

April 2020

Introduction

- ▶ This study details the findings of a multi-country market research study, aimed to understand how the general public are feeling in relation to the worldwide COVID-19 pandemic. The project aimed to understand more:
 - Fears/concerns
 - Confidence in Government
 - Confidence in economy
 - Understanding & attitudes towards COVID-19
- ▶ Overall, 15 countries took part in this study, with all fieldwork undertaken online between 27th March and 15th April, 2020. A nationally representative sample of adults aged 18+ was interviewed in each country.

Participating Countries

Click on the logo of each company to learn more about them.

Austria



Colombia



Poland



Australia



India



South Korea



Bulgaria



Ireland



Turkey



Chile



Japan



United Kingdom



China



Mexico



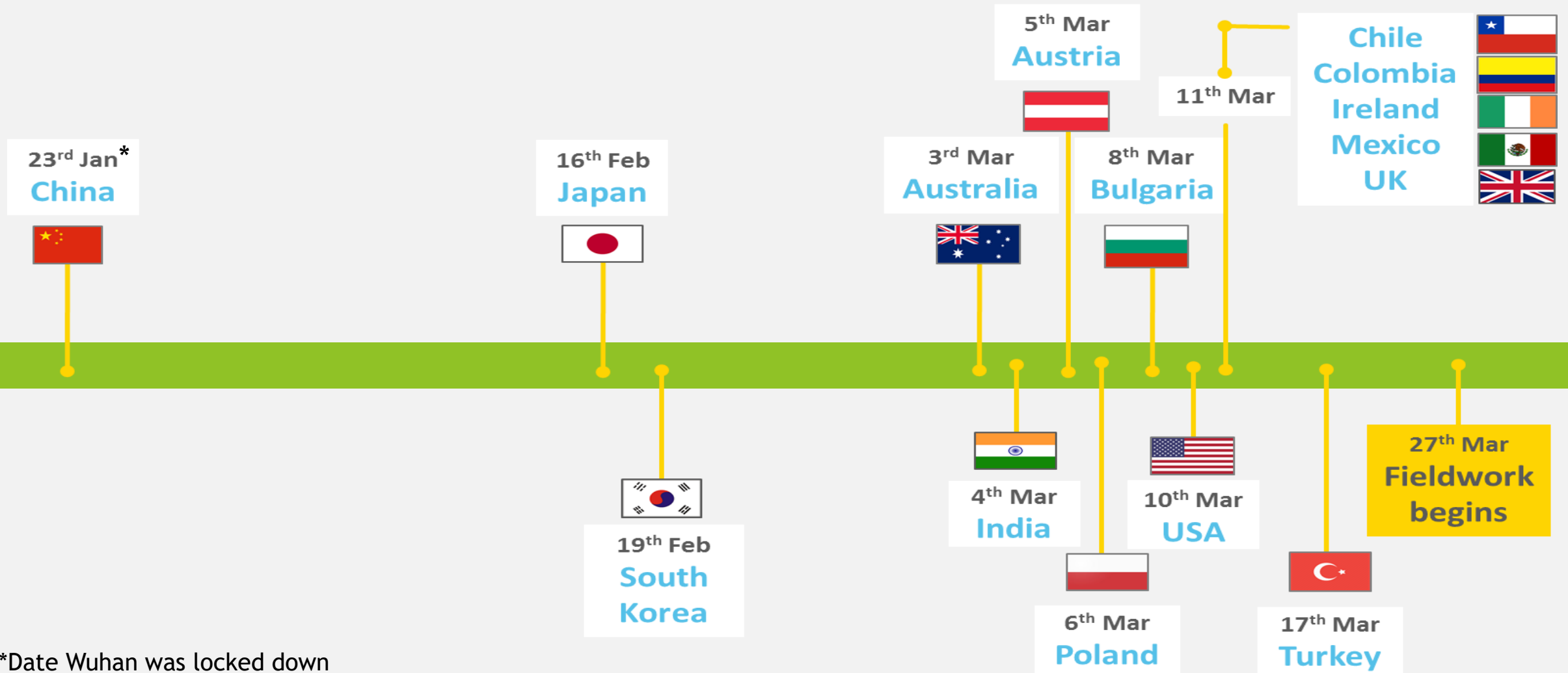
United States



The International Research Institutes (iris) network is present in 34 countries, and works together regularly on syndicated projects, as well as developing joint projects on areas of common interest. At the time of fieldwork some agencies had already initiated their own COVID-related studies; the balance decided that they wanted to participate on this Irish-led study. An invite to join the study was issued on March 17th, although dialogue with Chinese and other Asian partners had started in January, sowing the initial seed to develop a joint approach.

Dates of first infection in participating countries

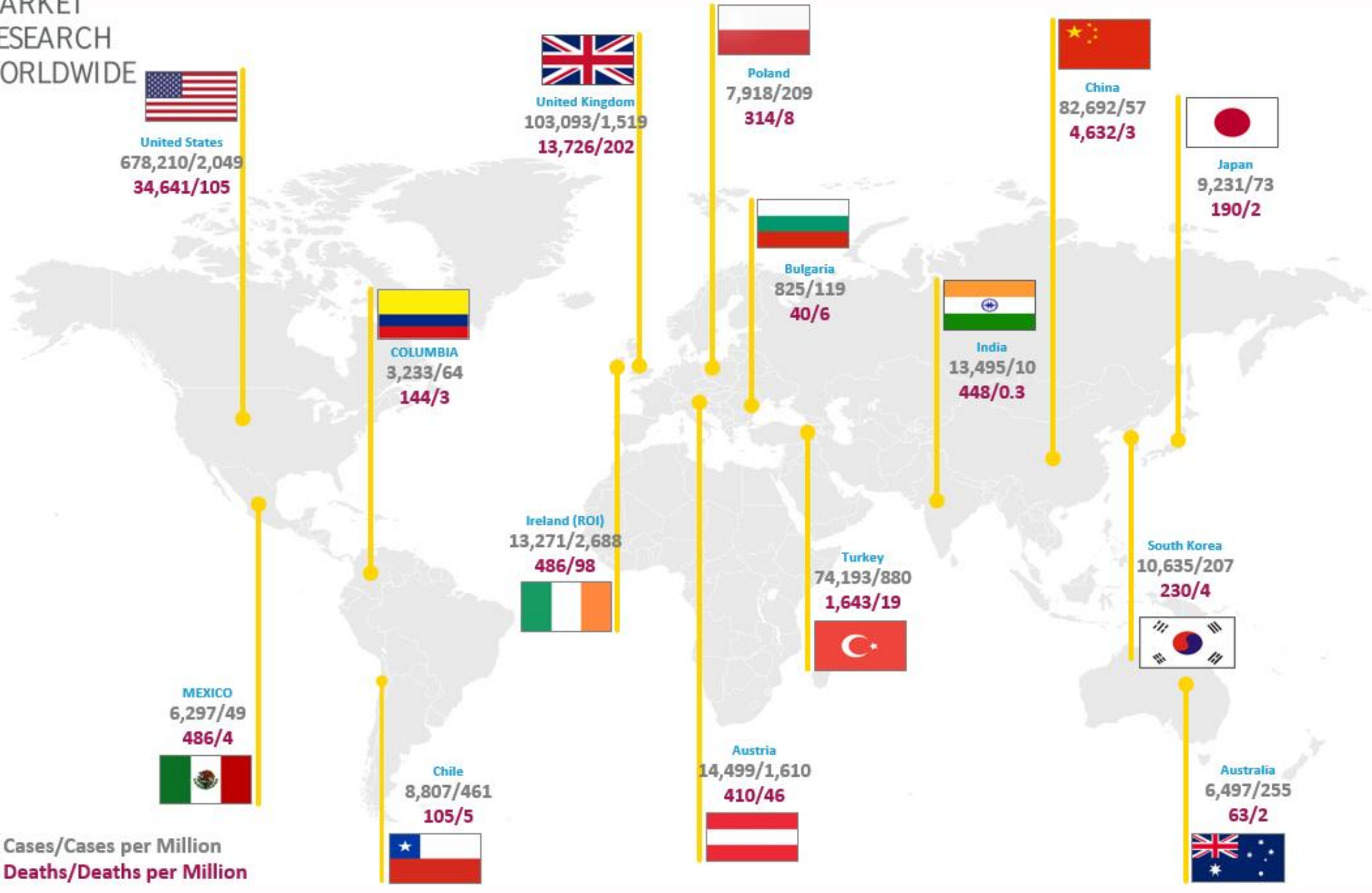
Source: Worldometer



*Date Wuhan was locked down



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Number of Cases/Cases per Million
Number of Deaths/Deaths per Million

Source: Worldometer on 17th April 2020

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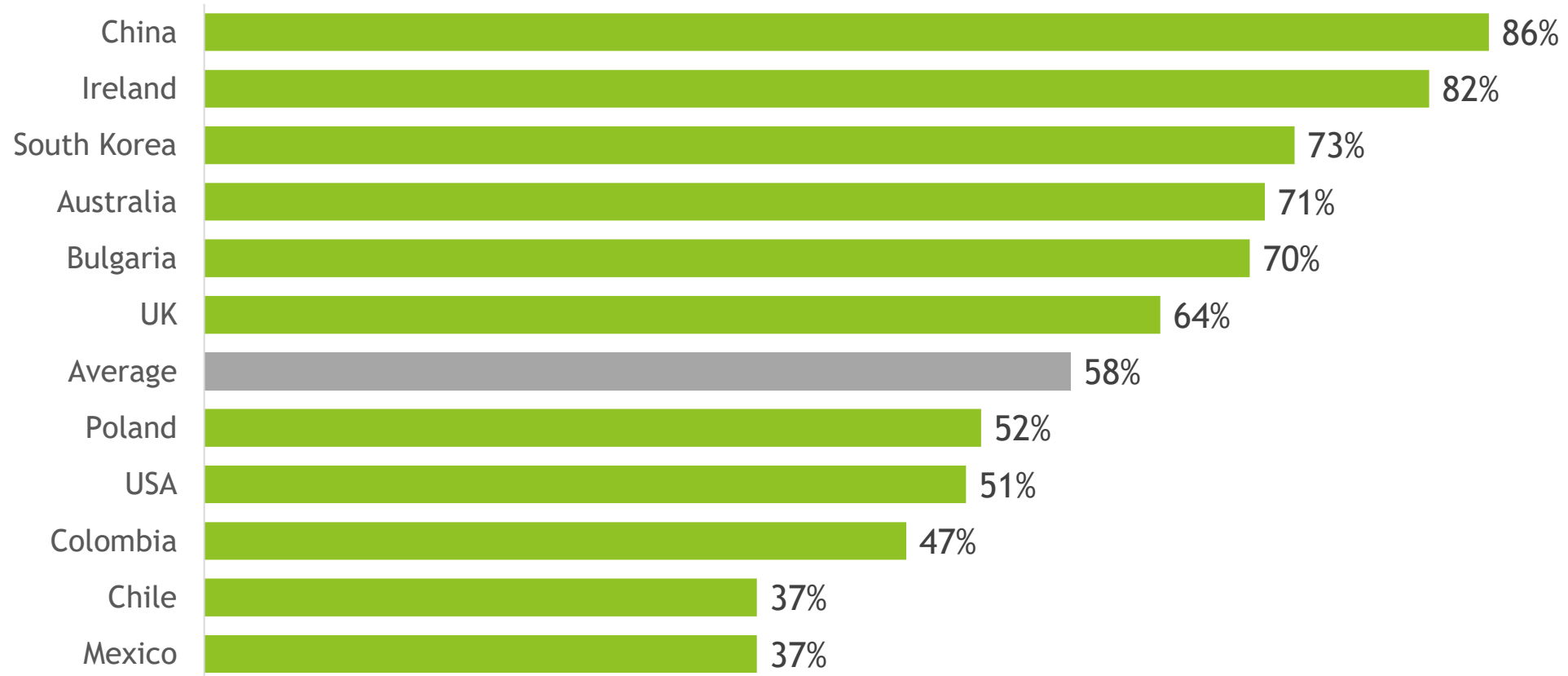


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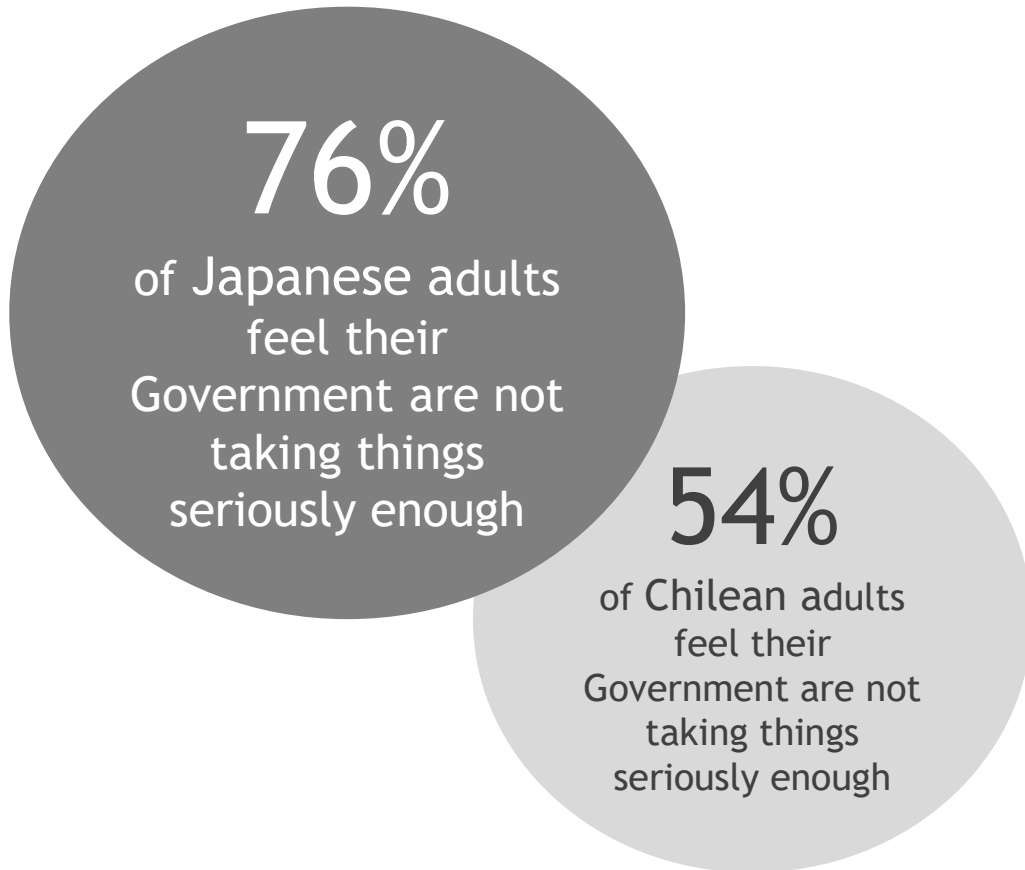
1. Confidence in Government

Those living in China are the most inclined to feel their Government/Authorities are acting appropriately

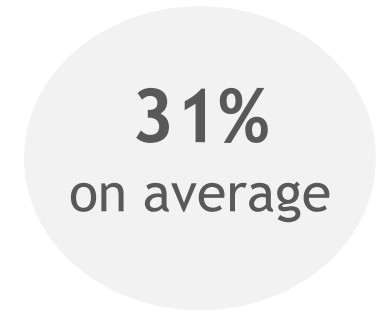
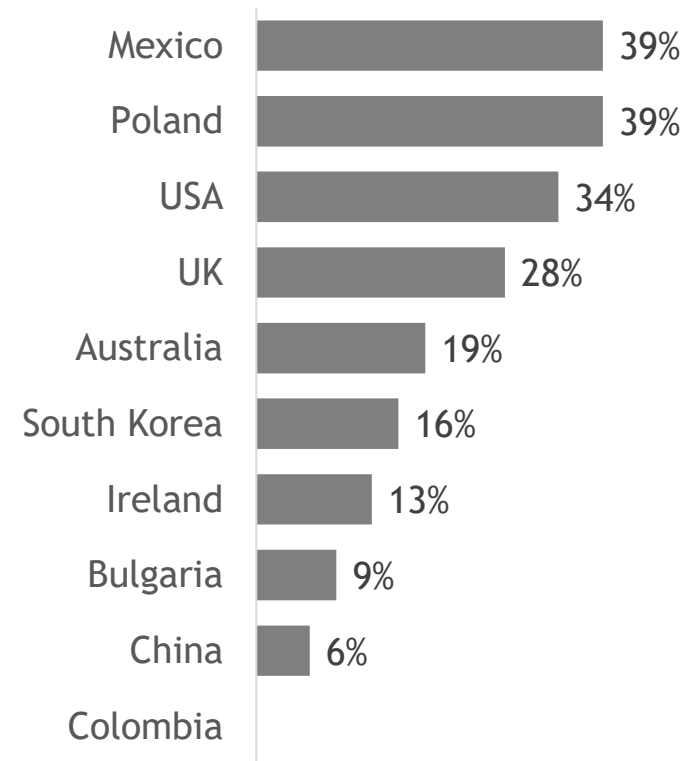
% Feel Government Acting Appropriately



Meanwhile, those in Japan and Chile are the more inclined to feel their Governments are not taking things seriously enough



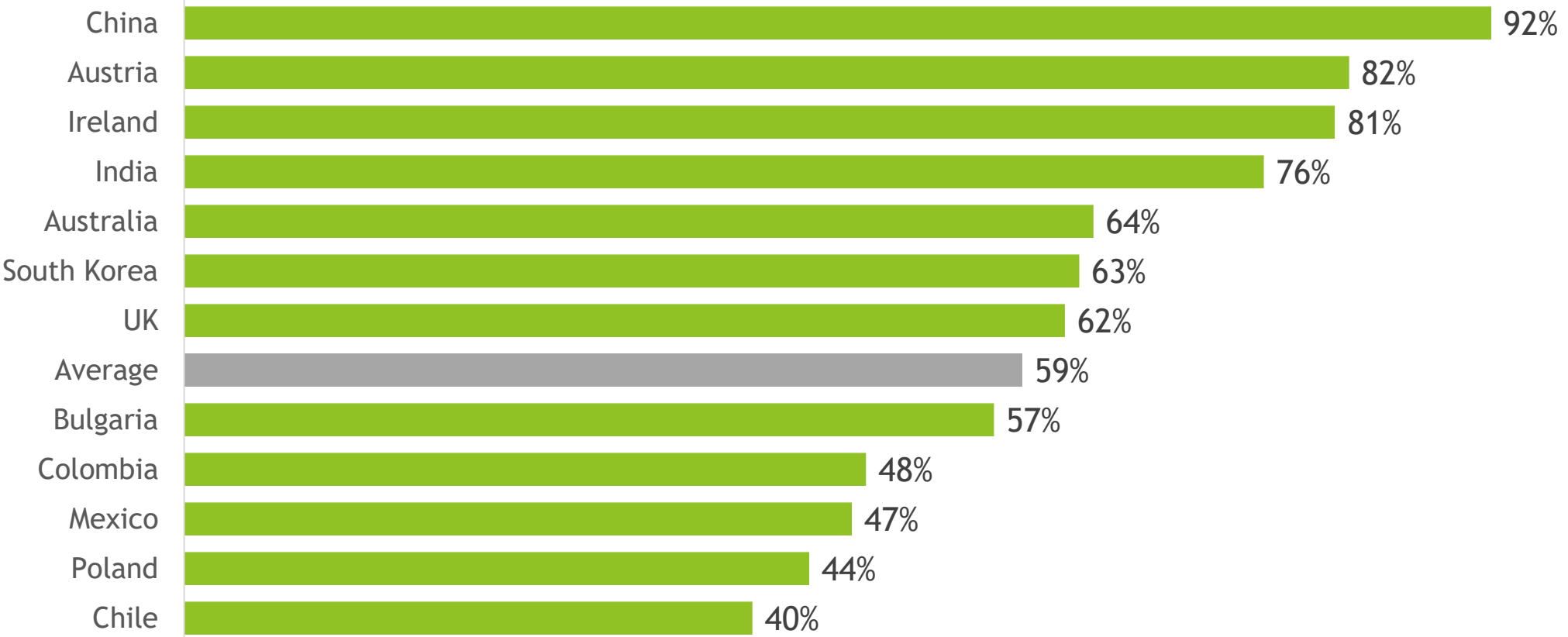
% Feel Government not taking things seriously enough



Q. And do you feel that the authorities/Government in our country are acting appropriately at present, are they treating the current situation too seriously, or are they not taking things seriously enough?

Some stark differences evident in terms of the proportion in each country who feel their Government is doing a good job in the face of COVID-19

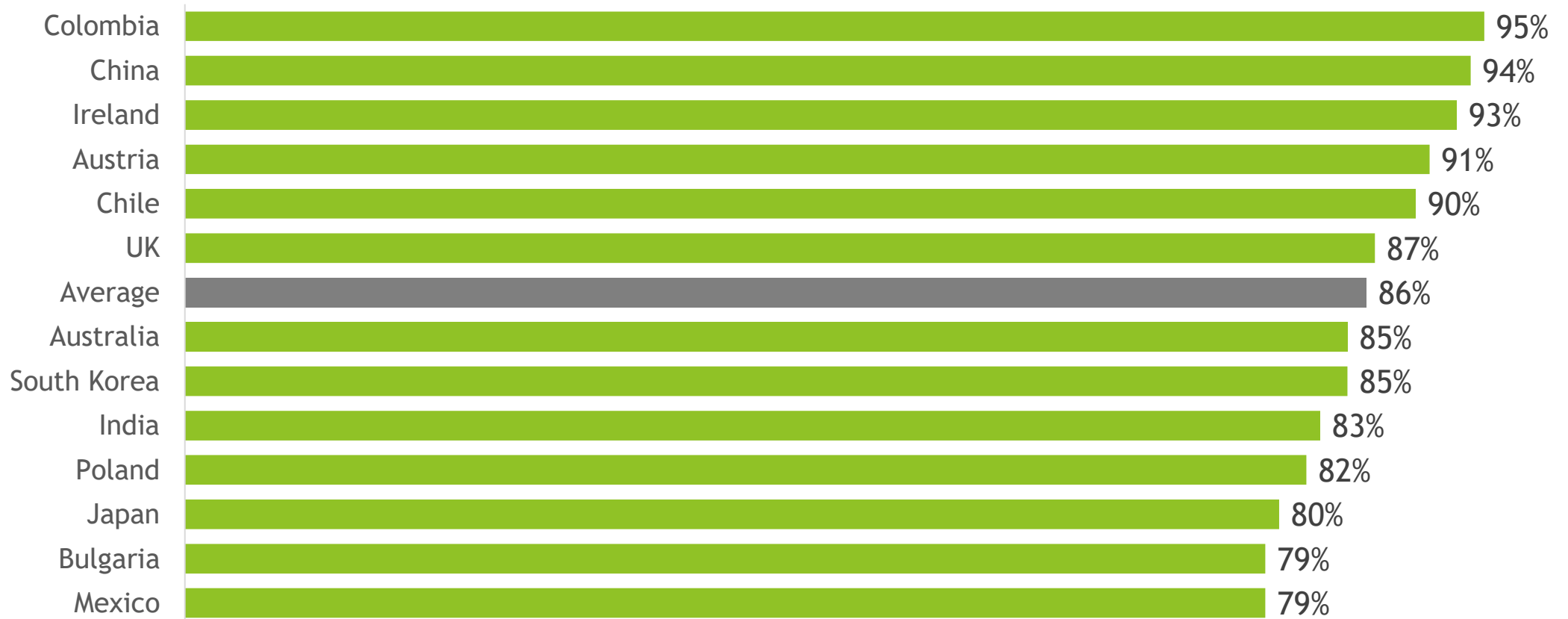
% agree their Government is doing a good job combatting COVID-19



Q.19 To what extent do you agree or disagree with each of the following statements... I feel the government is doing a good job combatting COVID-19

The vast majority are proud of the work of their healthcare workers during this crisis

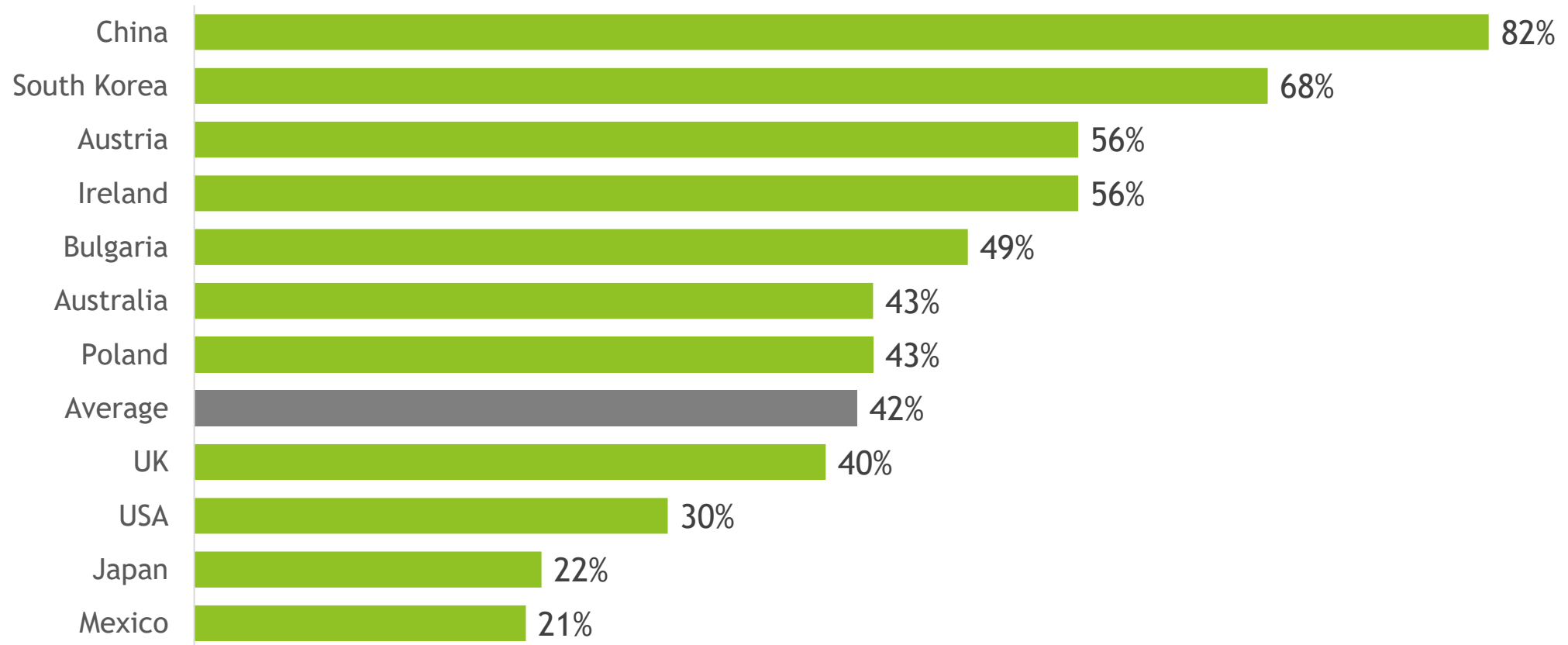
% are proud of their healthcare professionals in this COVID-19 health crisis



Those living in China are the most inclined to feel their citizens are acting appropriately

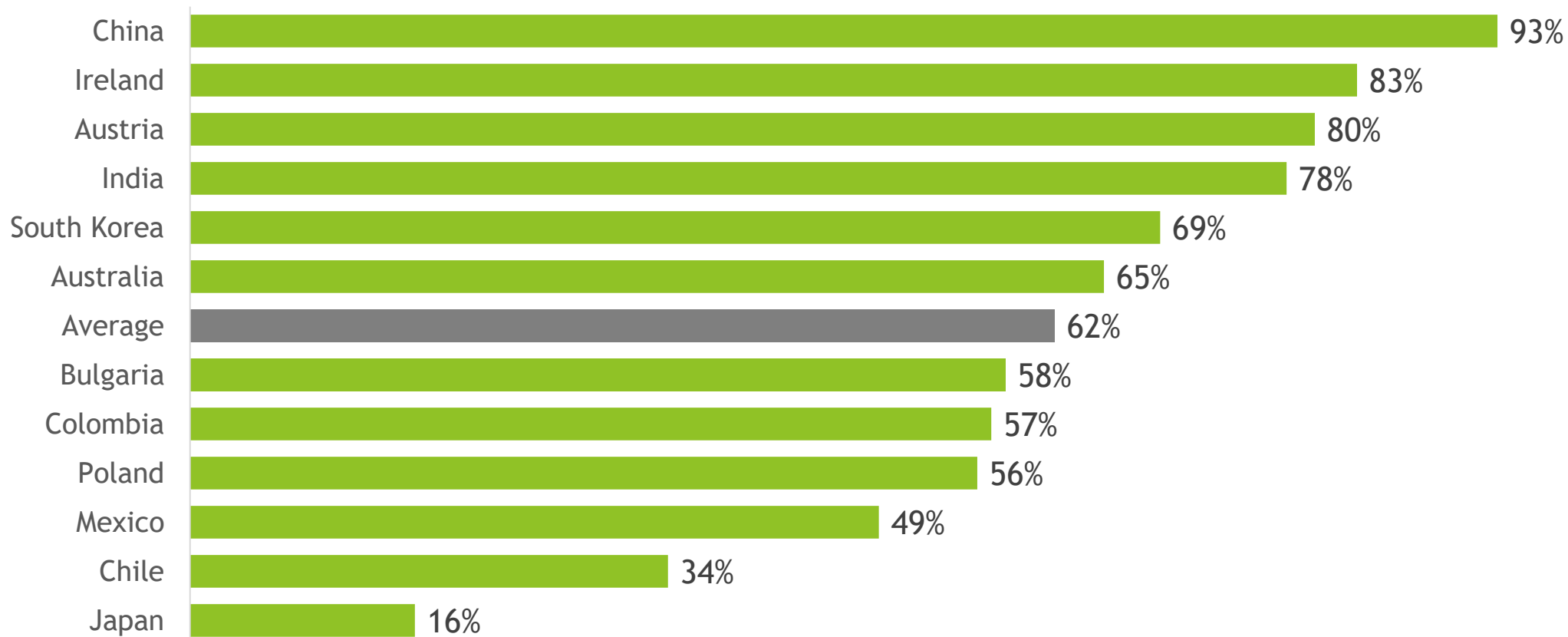


% Feel the Public are Acting Appropriately



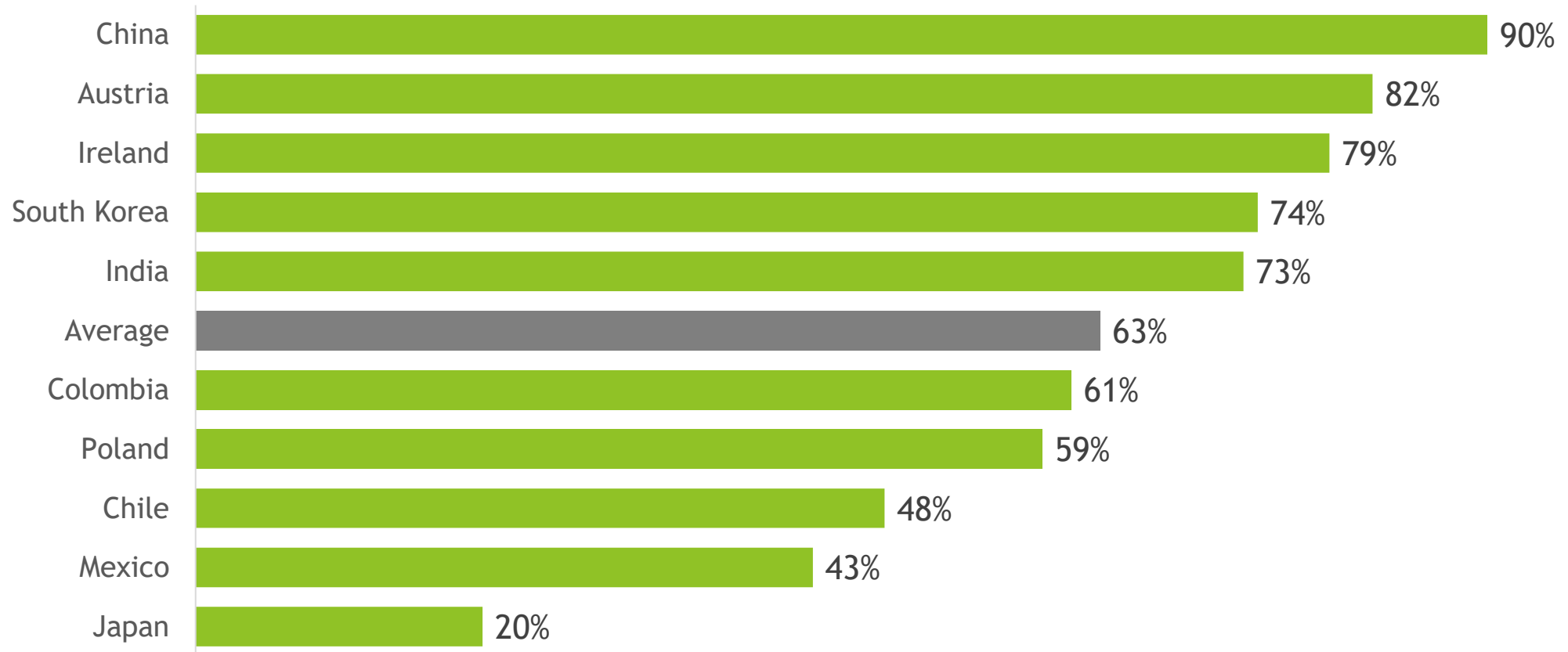
Those in Japan are least inclined to feel pride in their country as a result of how the crisis is being handled

% have pride in their country as a result of how the crisis is being handled



Those living in China are the most inclined to feel they have reacted better to this crisis than other countries

% feel their country has reacted better to the crisis than others





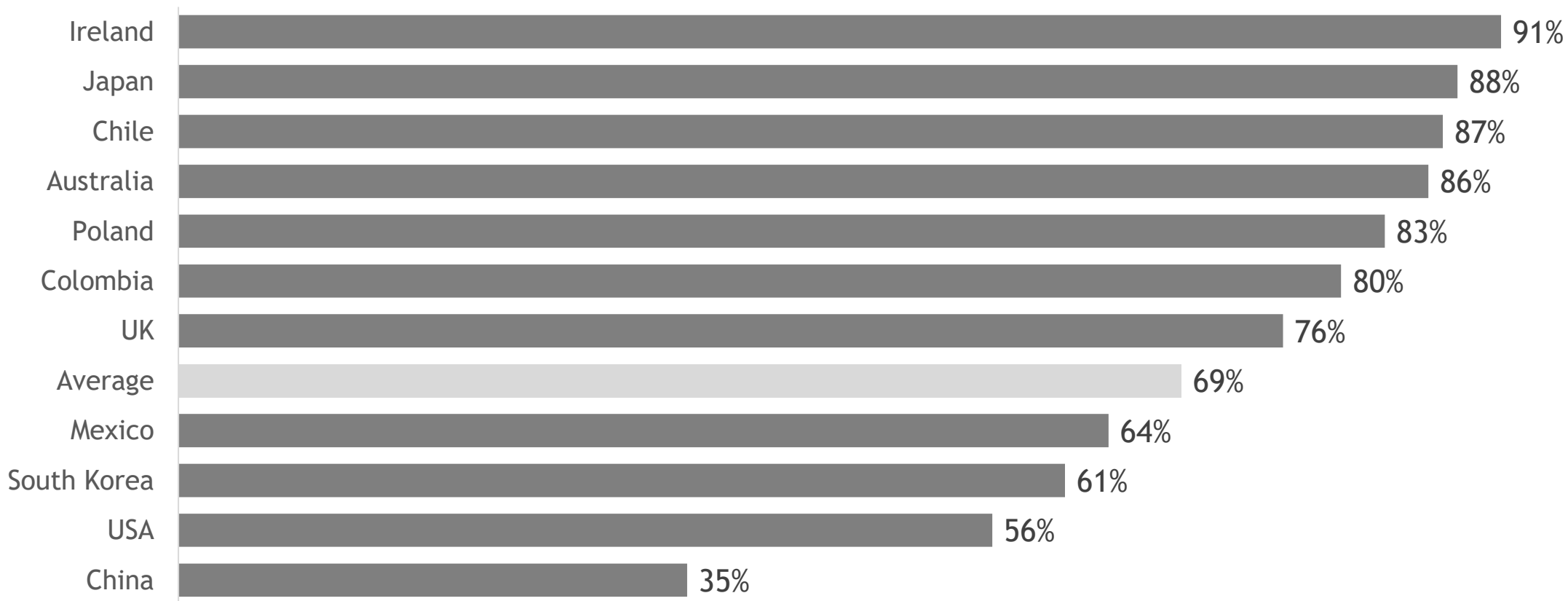
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2. Confidence in the Economy



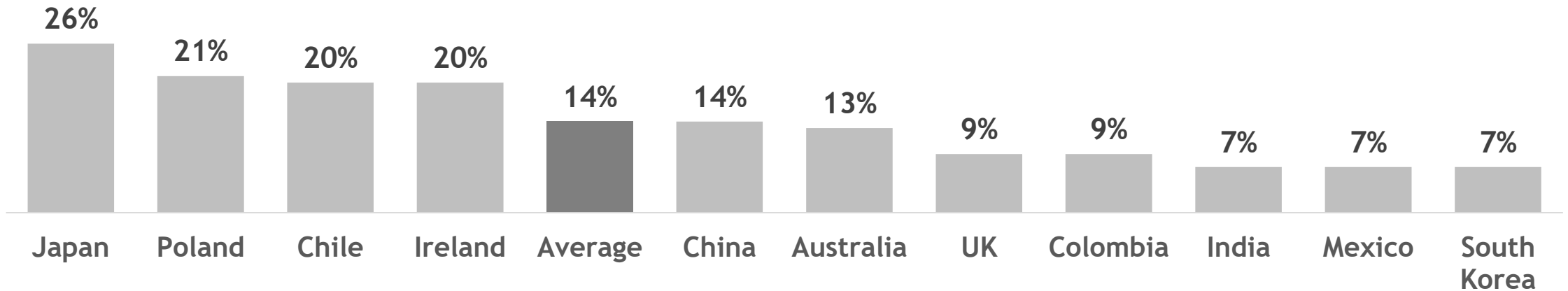
Those in Ireland are the most pessimistic when thinking about their economy over the next year, although the majority in most countries feel their economy will be worse

% Feel the economy will be worse off over the next 12 months

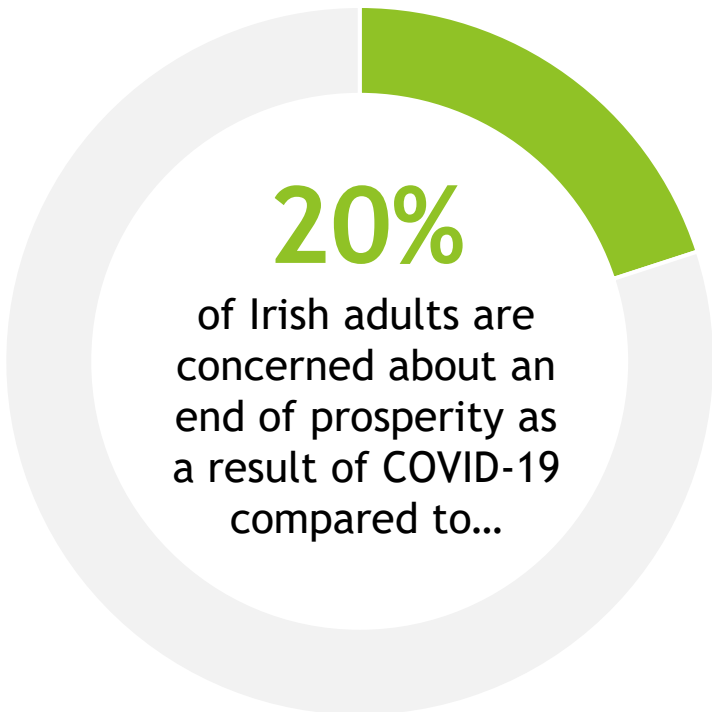


Those in Japan are the more likely to be feeling anxious about end of prosperity

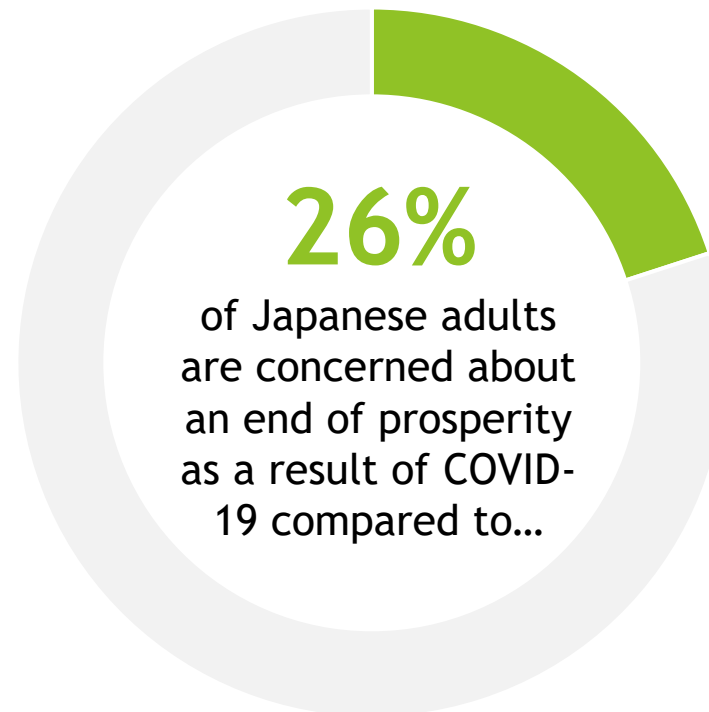
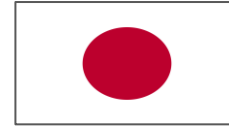
% feel anxious about an end of prosperity



Japan and Ireland are much more likely to be concerned about an end of prosperity than their closest neighbours.



only **9%** concerned in the UK.



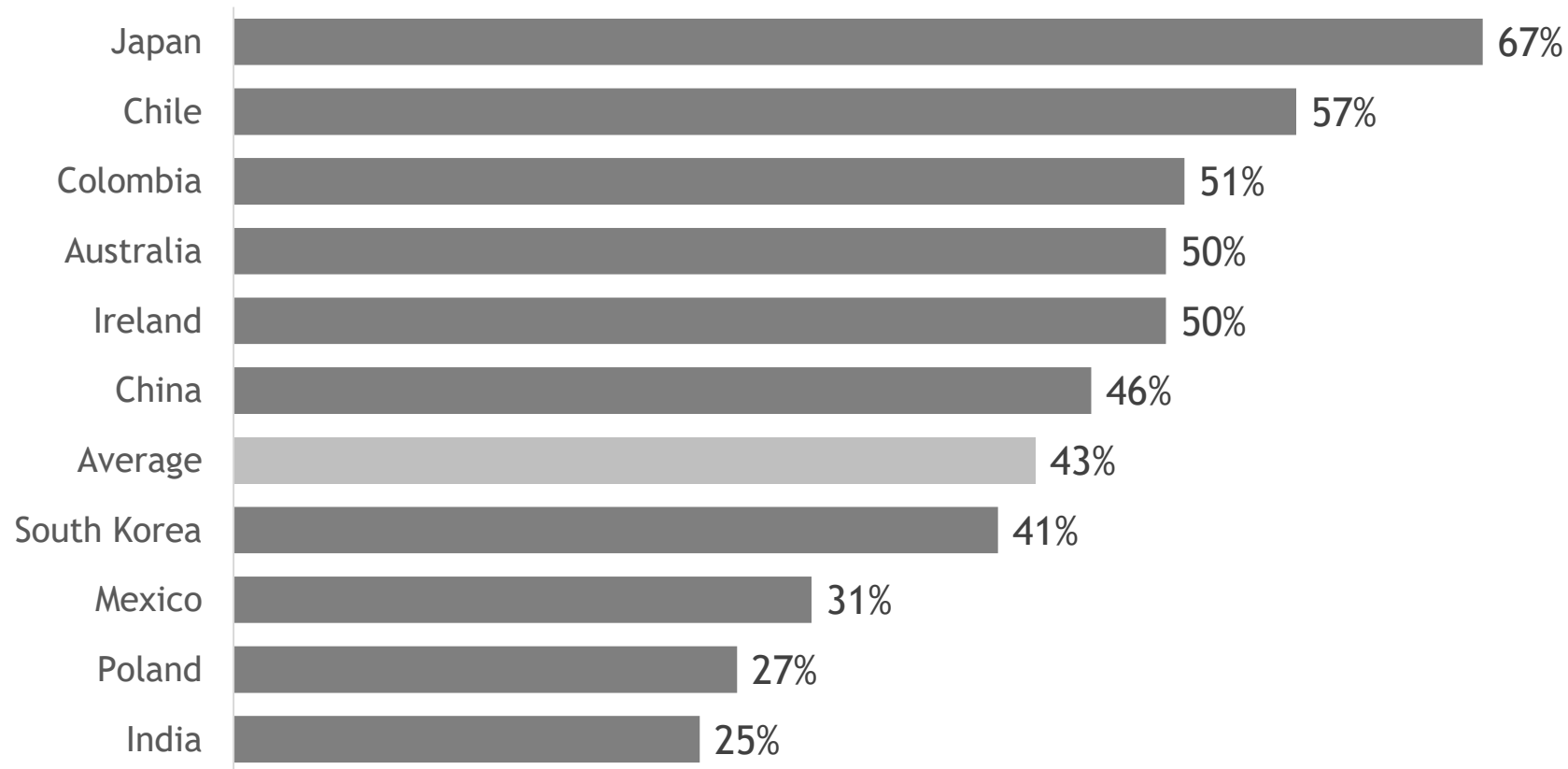
only **7%** concerned in South Korea.



only **14%** concerned in China.

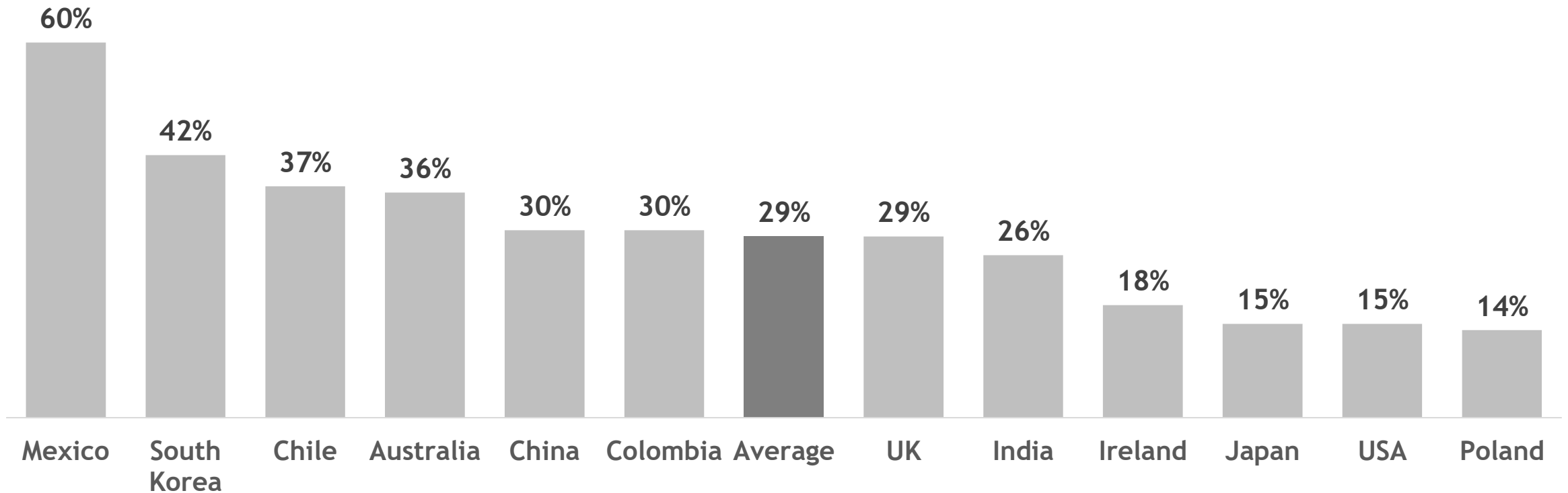
Two thirds in Japan and more than half in Chile feel anxious about the possibility of a recession/global downturn

% feel anxious about the prospect of a recession/global downturn



Each country is viewing COVID-19 from a different base line in terms of their financial situation prior to the crisis.

% were struggling financially prior to the COVID-19 crisis



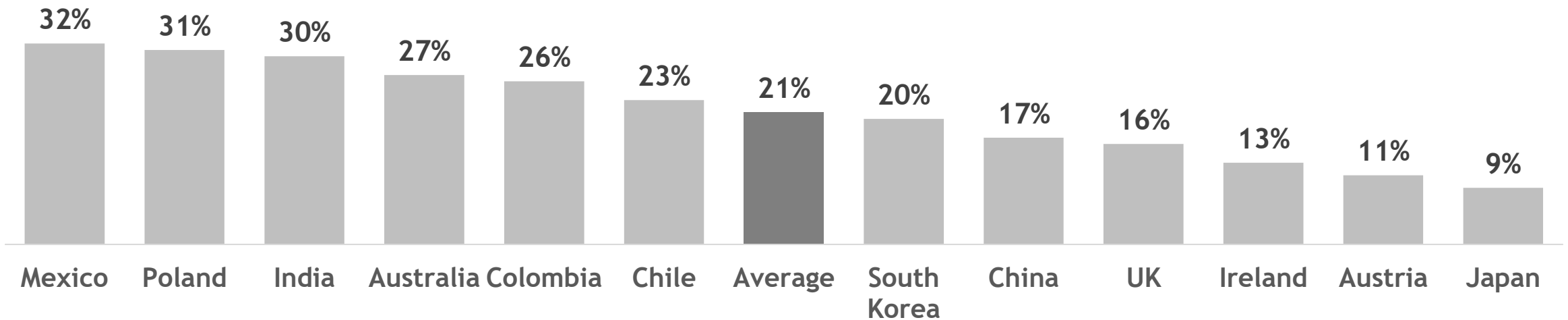



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3. Impact & Fears for the Future

Those in Mexico, India and Poland are the most inclined to feel socially isolated at present.

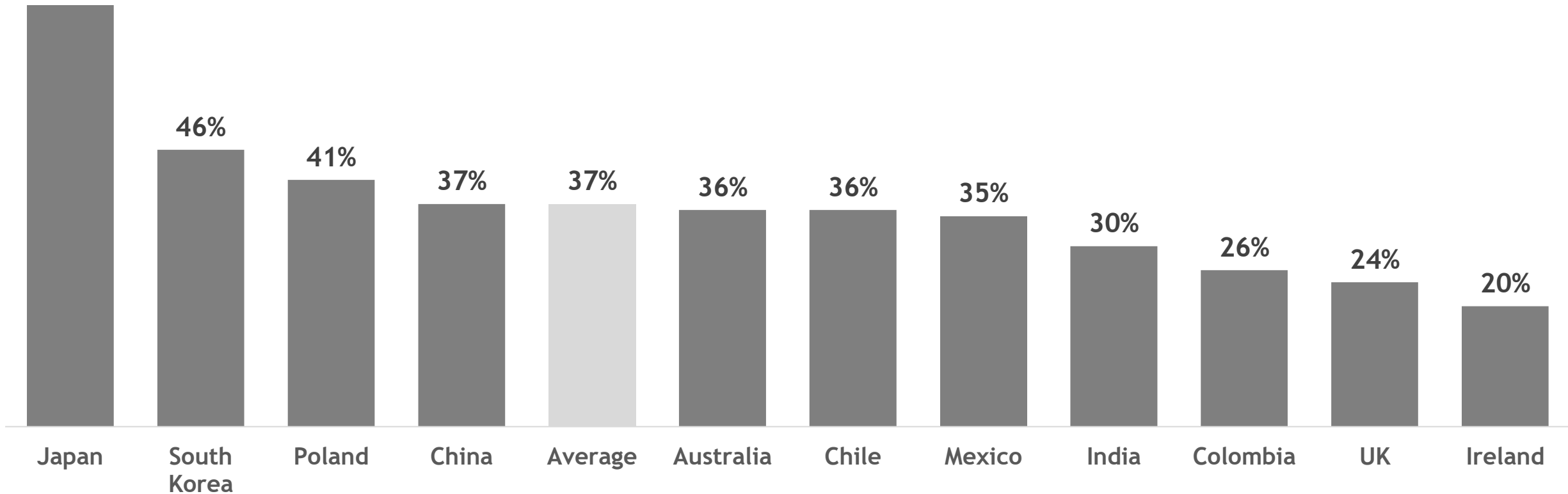
% feeling very socially isolated (i.e. rate 8-10 out of 10)



 Q. On a scale of 1-10 how socially isolated or not do you feel currently? 10 means that you feel very isolated and in need social support and 1 means that you are relaxed about your current situation?

Irish adults are the least likely to feel anxious about the lifestyle restrictions (also least inclined to feel socially isolated at present).

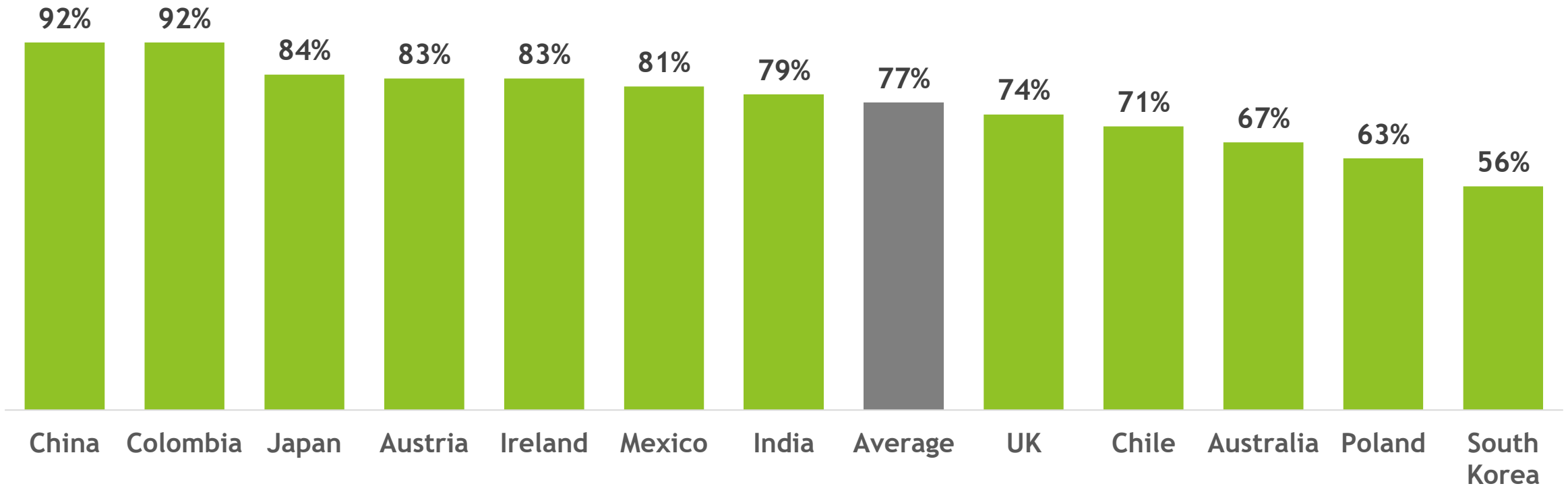
% anxious about the lifestyle restrictions imposed (8-10)



Q.11 On a scale of 1-10 how anxious or not do you feel about the lifestyle restrictions that have been imposed on us by Covid 19?

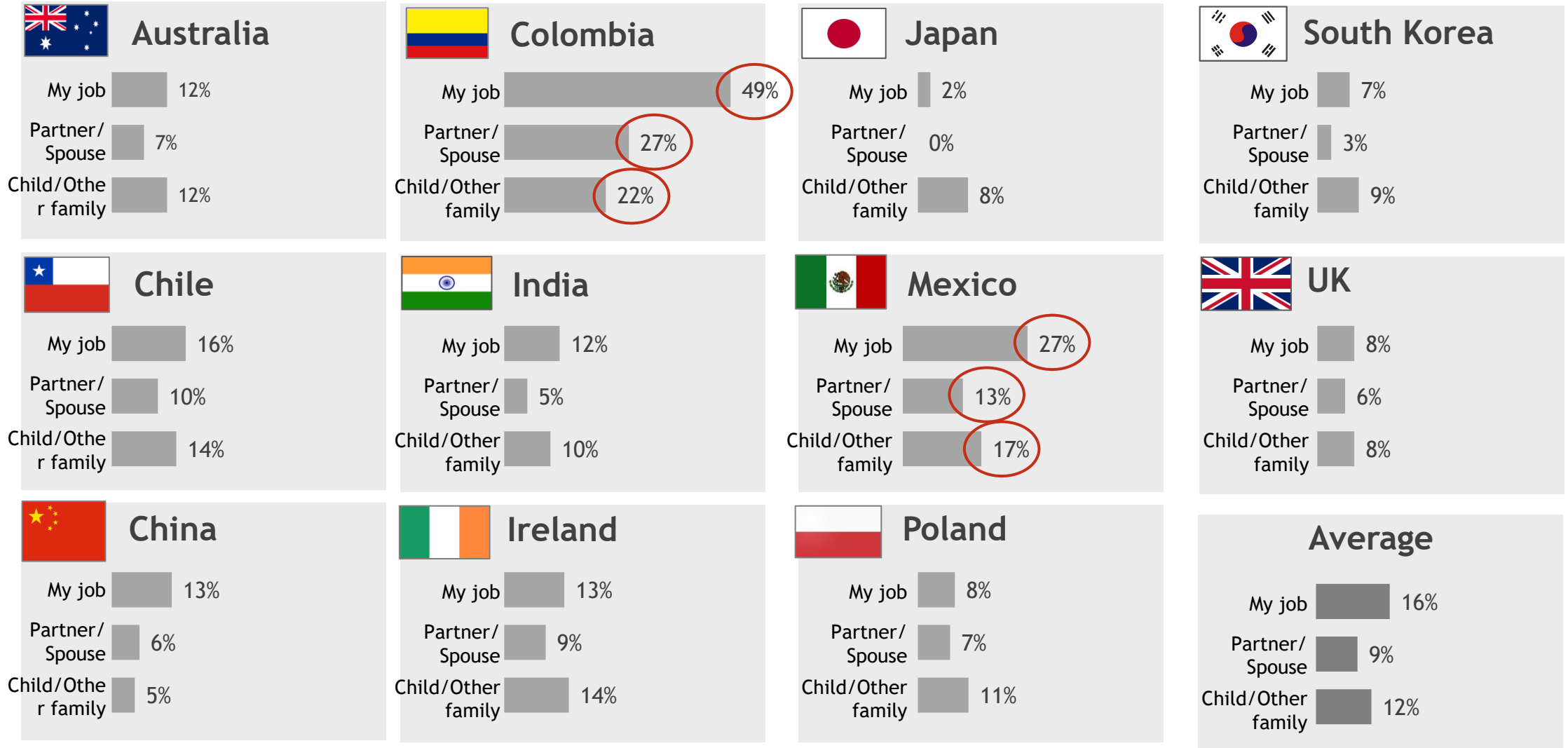
The majority in each country agree that they are maintaining their mental/physical health during the crisis

% agree they have been ensuring they stay mentally/physically fit during the crisis



Those in Colombia and Mexico are the most inclined to have experienced a job loss in the family as a result of the COVID-19 crisis.

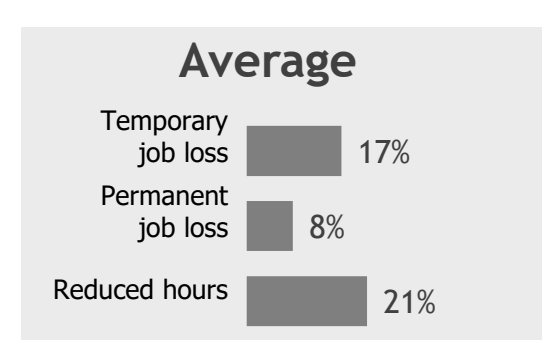
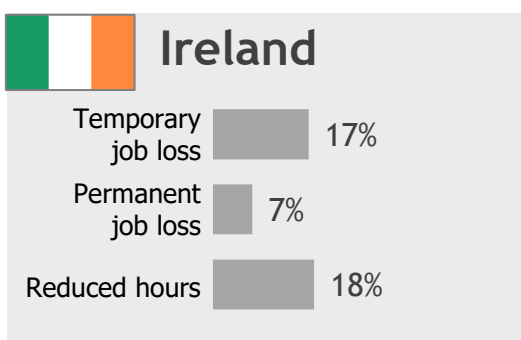
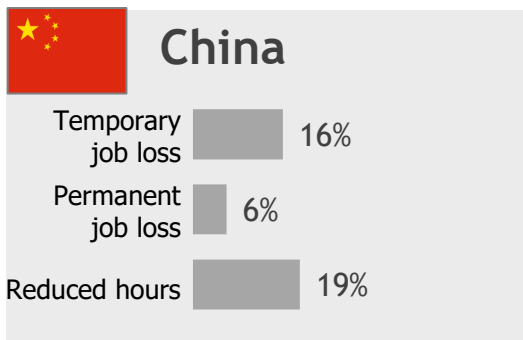
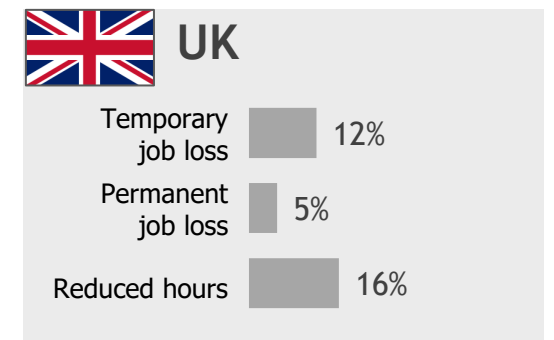
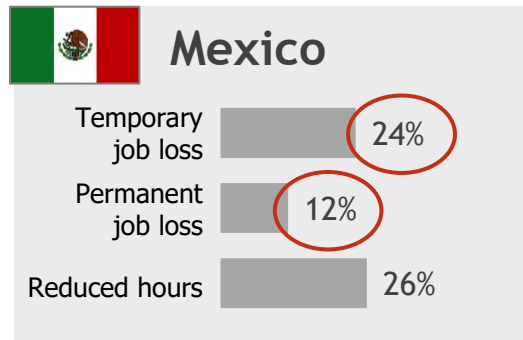
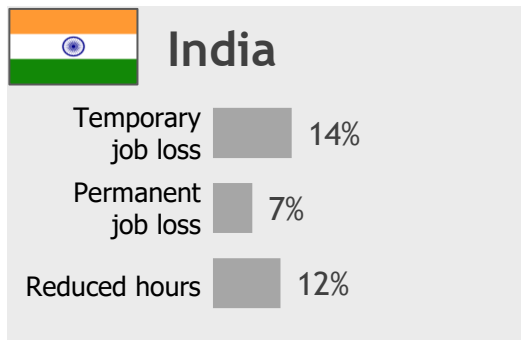
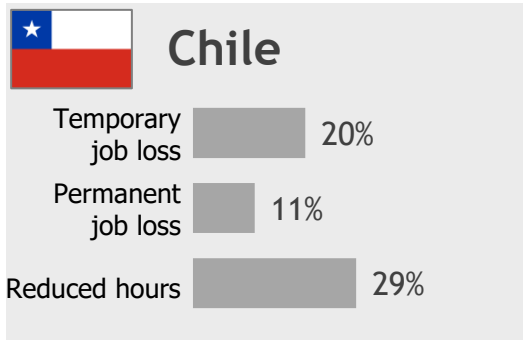
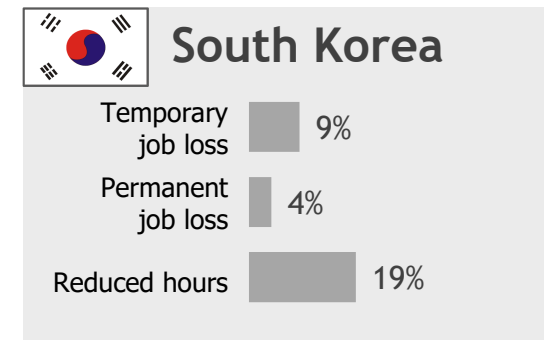
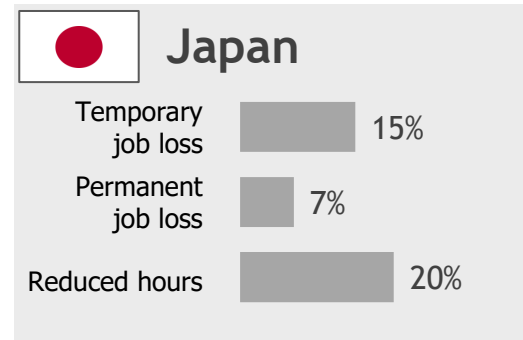
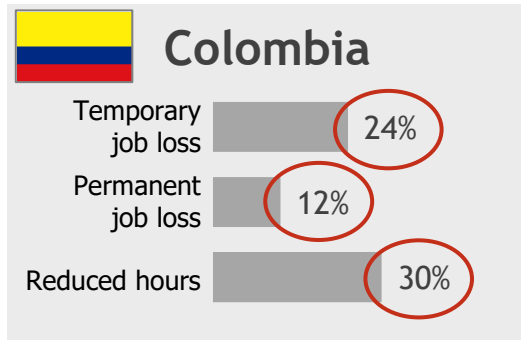
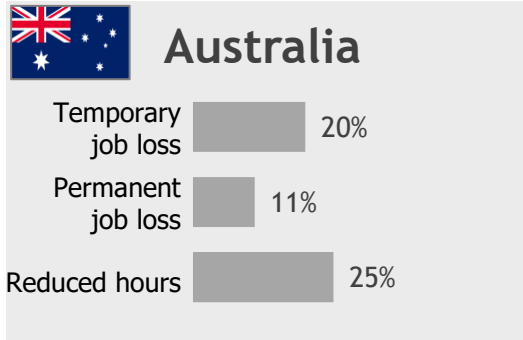
% reported job losses as a result of COVID-19



Q.16a Which if any of the following has already occurred as a result of the COVID-19 crisis?

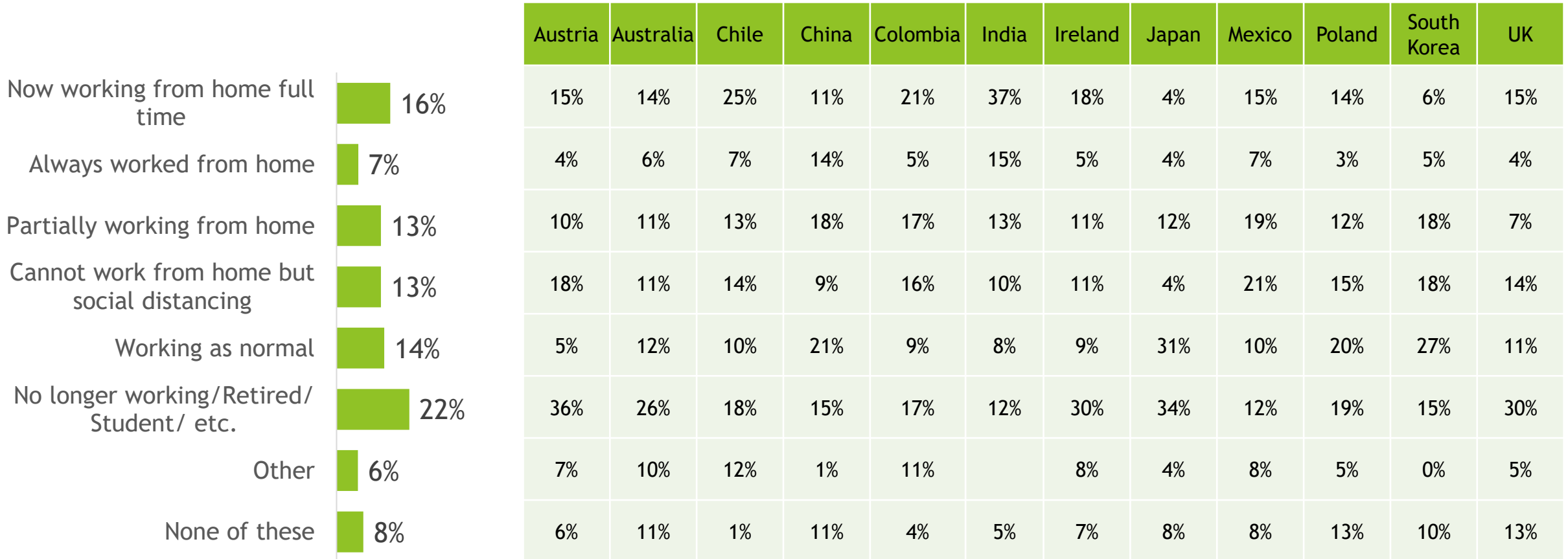
Those in Colombia and Mexico are also more pessimistic when it comes to the future of their jobs

% anticipated personal job loss/reduced hours as a result of COVID-19



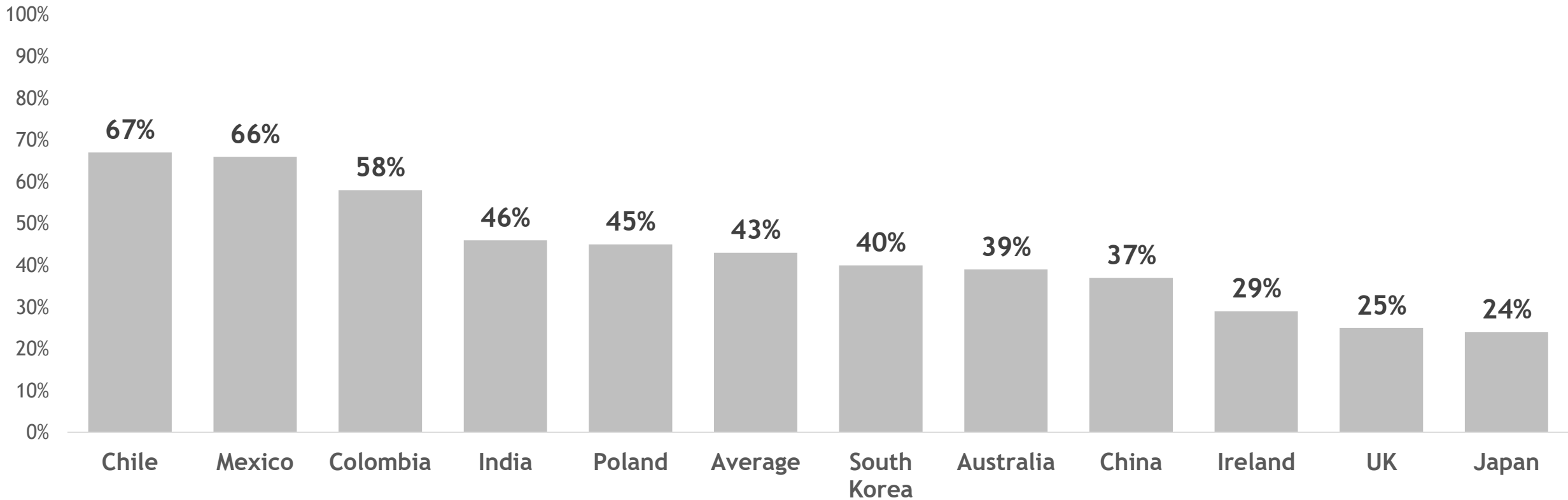
Q. Which if any of the following do you foresee as likely in the near future?

More than a third in India are now working from home full time



Those in Chile, Mexico and Colombia are the most likely to fear for their jobs or those of their partner/spouse

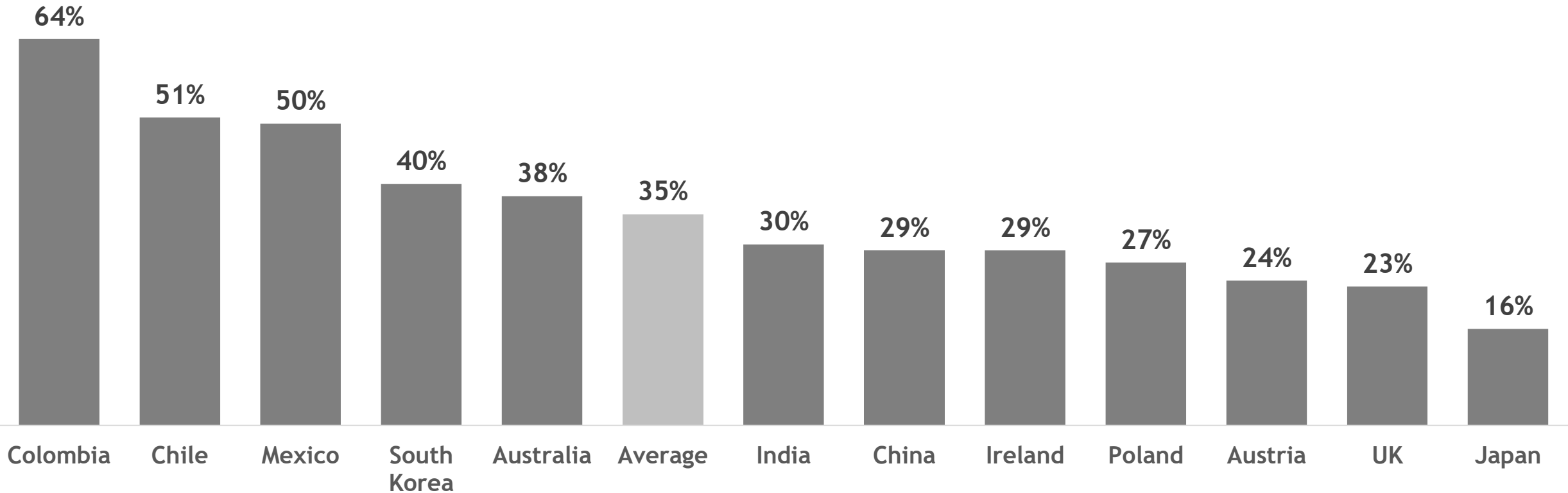
% concerned about job security for themselves or a partner/spouse (8-10)



Q.15 On a scale of 1-10 to what extent are you concerned about job security whether for yourself personally or for a partner/spouse?

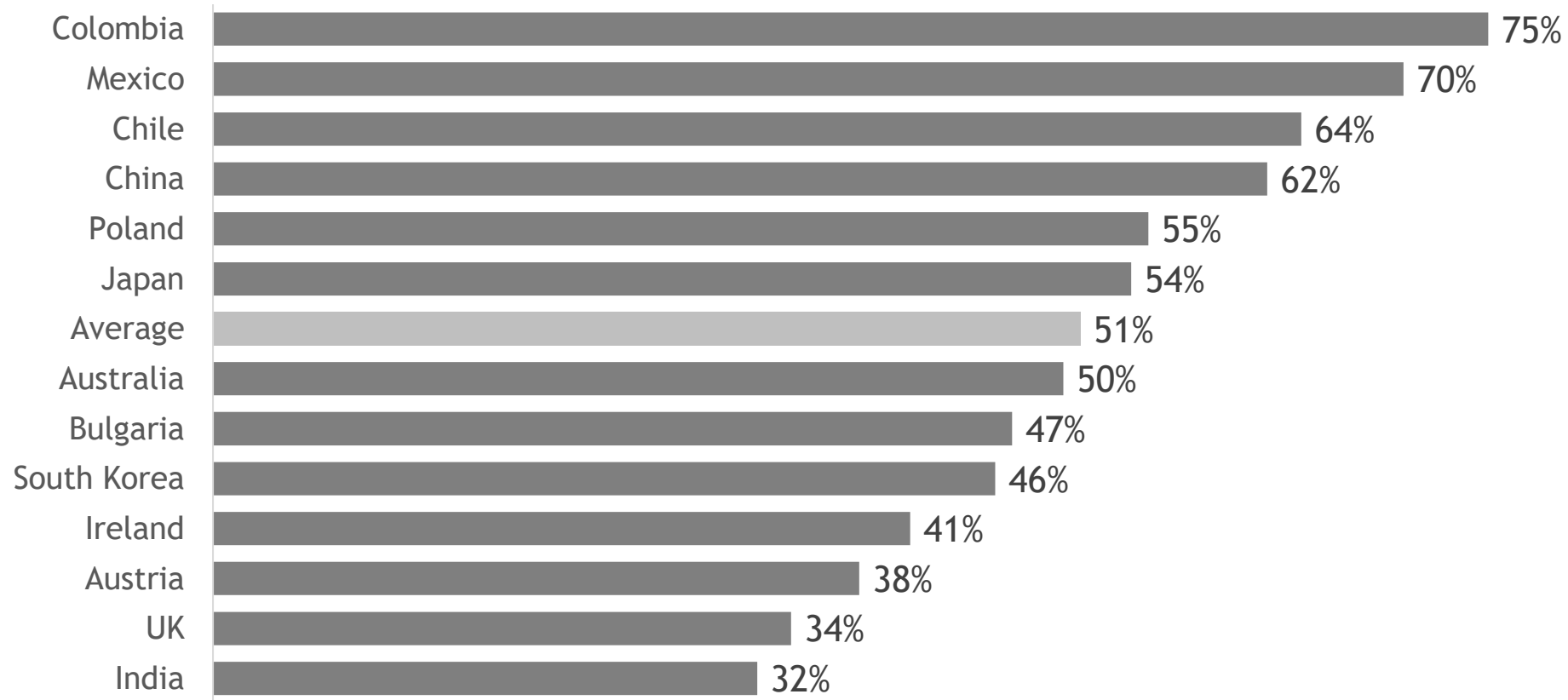
Those in South America and Central America are more likely to have reduced spending in anticipation of a reduced income

% reduced spending in anticipation of reduced income

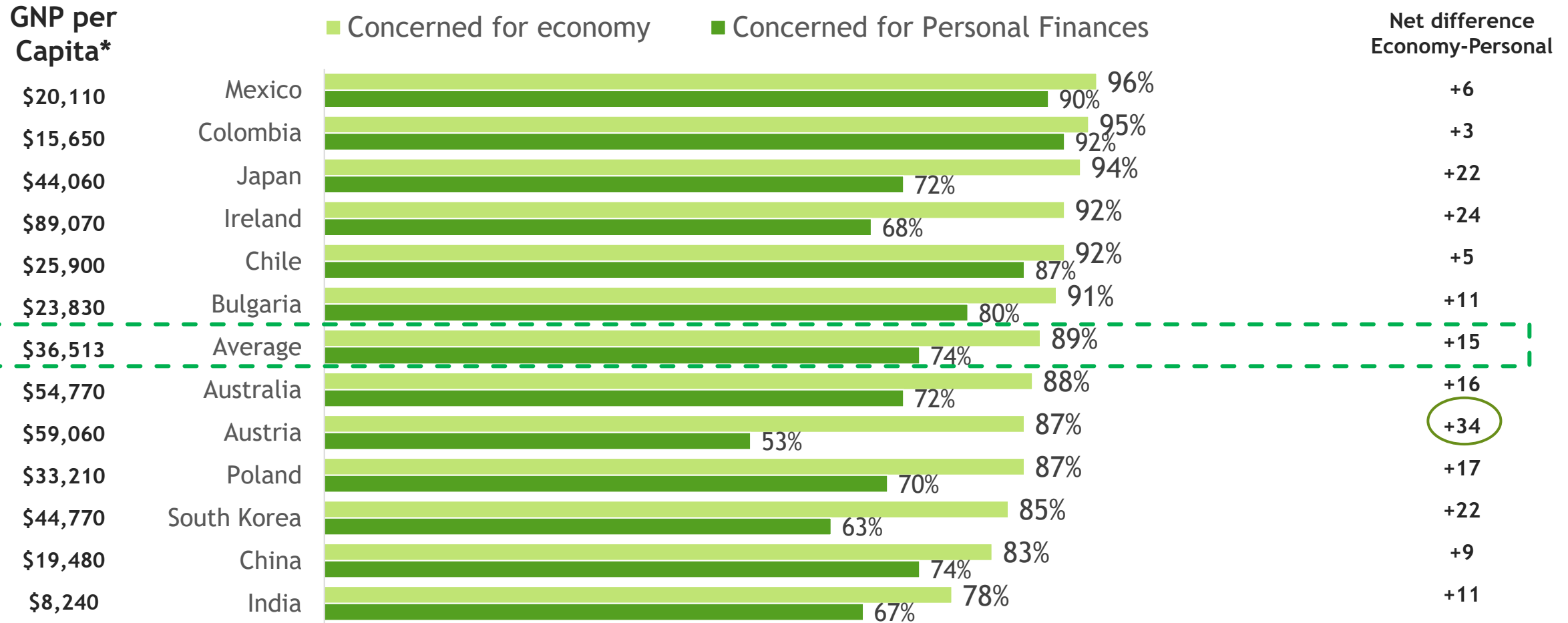


On average, roughly half expect to see a reduction in salary this year

% expect their salary to decrease this year



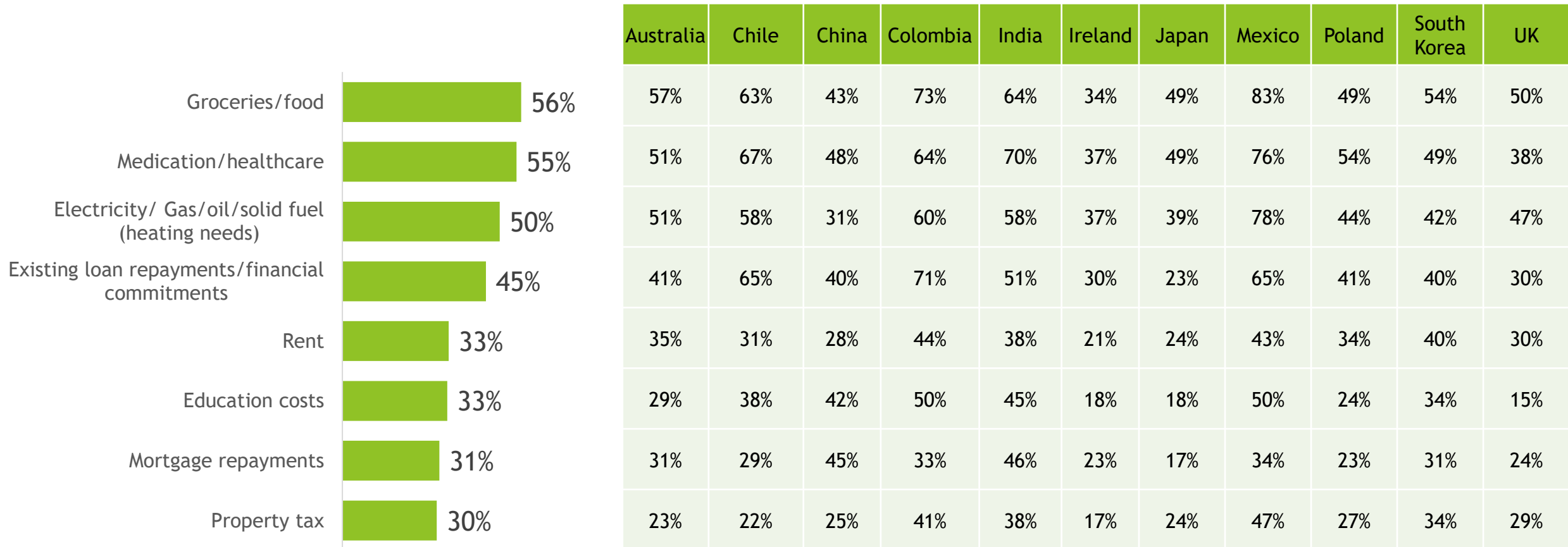
People are more concerned about the economy than they are about their personal finances



? Q. To what extent do you agree or disagree with each of the following statements...I am worried about the impact of COVID-19 on the economy
 Q. To what extent do you agree or disagree with each of the following statements...I am worried about the impact of COVID-19 on my personal finances

*Source: World Bank

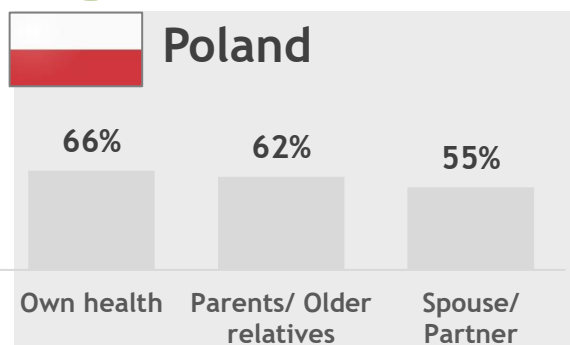
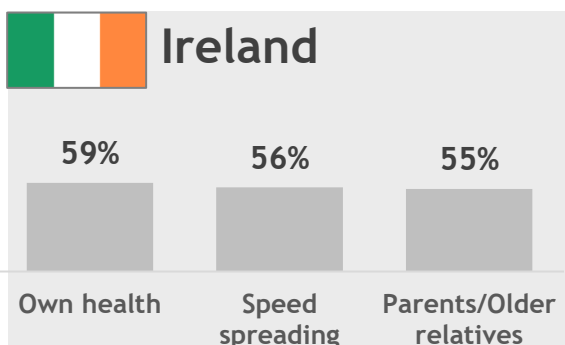
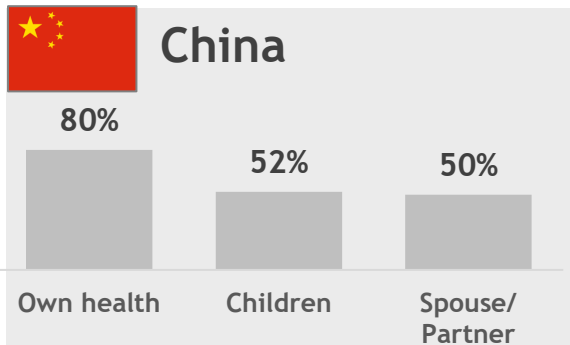
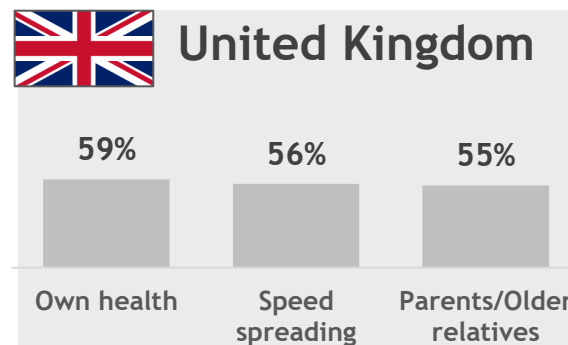
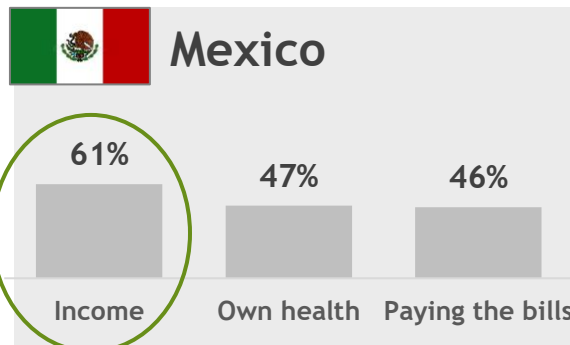
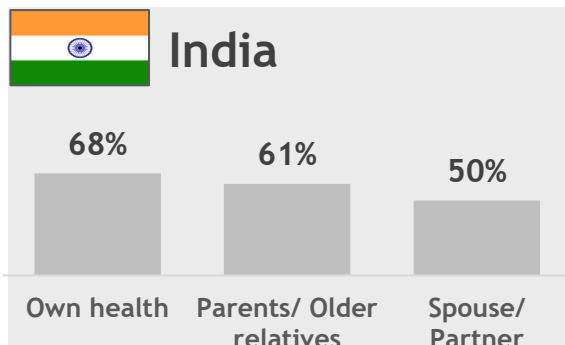
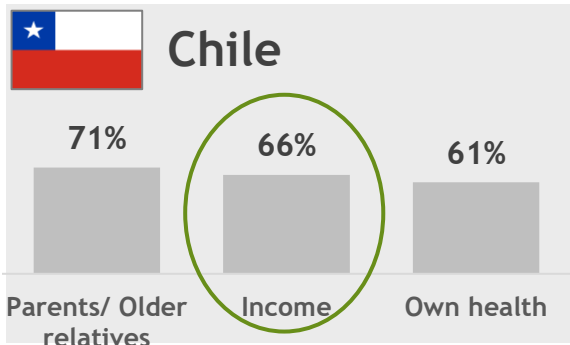
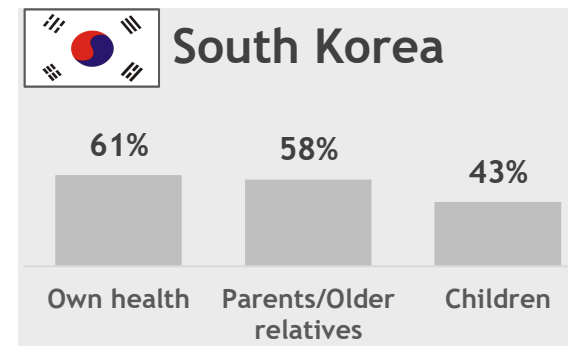
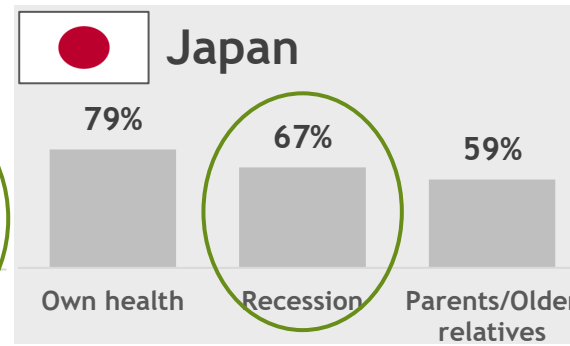
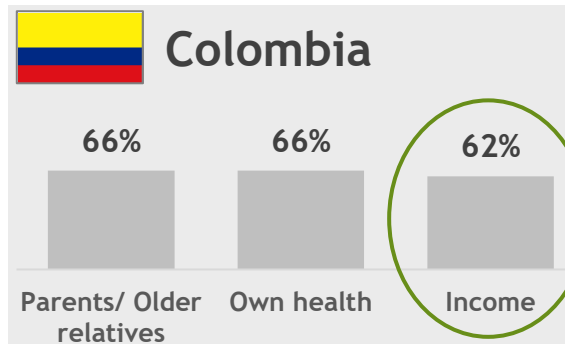
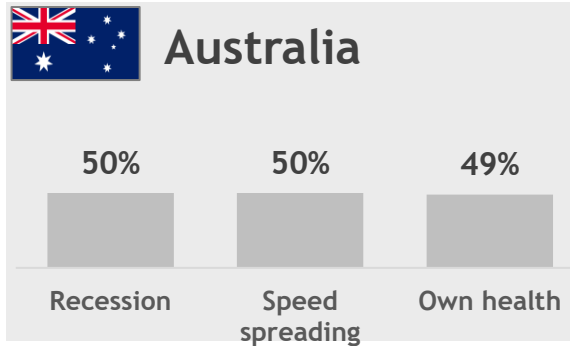
Groceries and medication/healthcare appear to be the bills people are most concerned about on average



Q.23 Which if any of the following living costs are you concerned about not being able to afford to pay should your monthly income be reduced or you find yourself on income support?

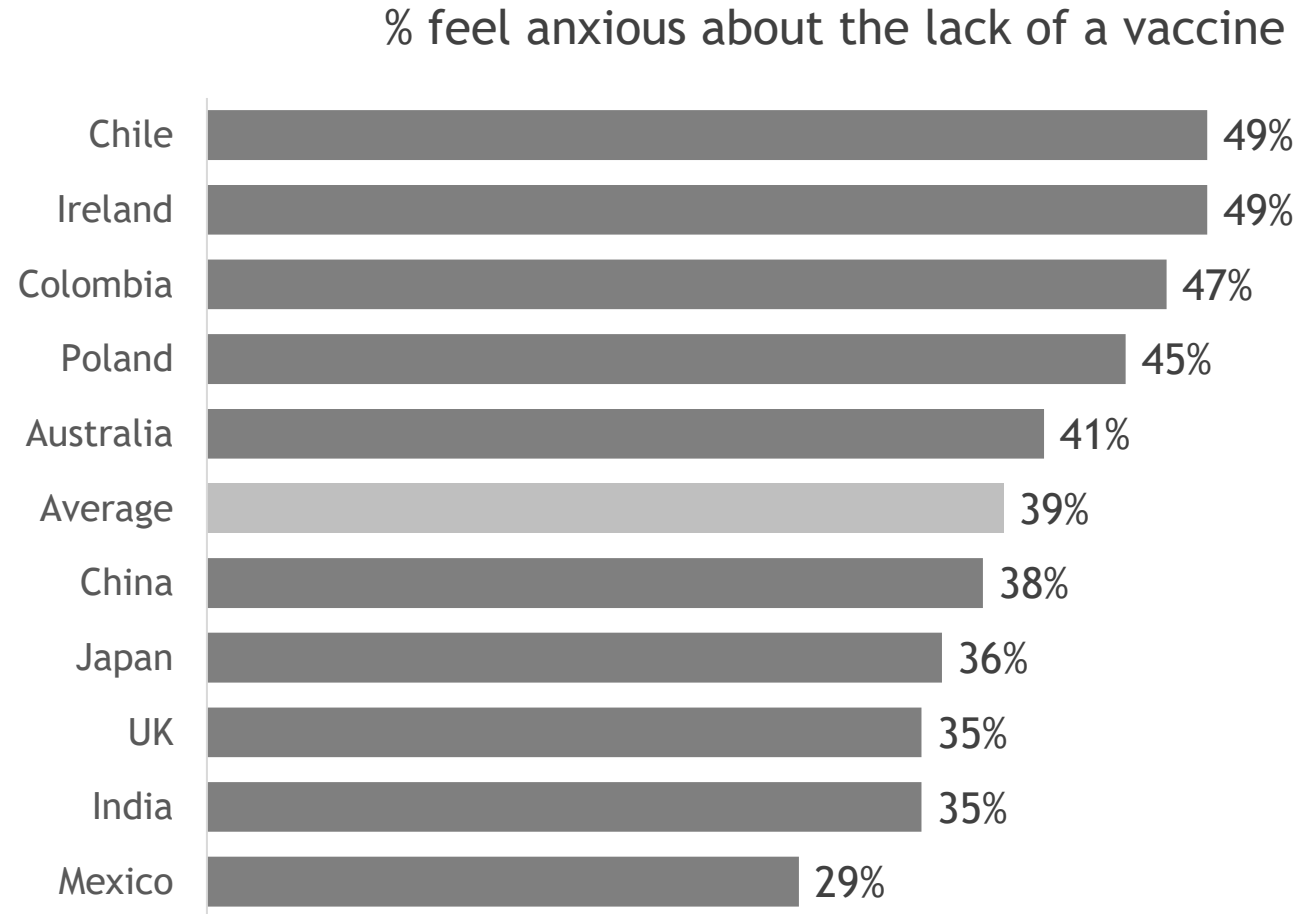
While the Japanese are more anxious about the potential of a recession, income a key concern for those in Central and South America.

Three Most Common Concerns in relation to COVID-19



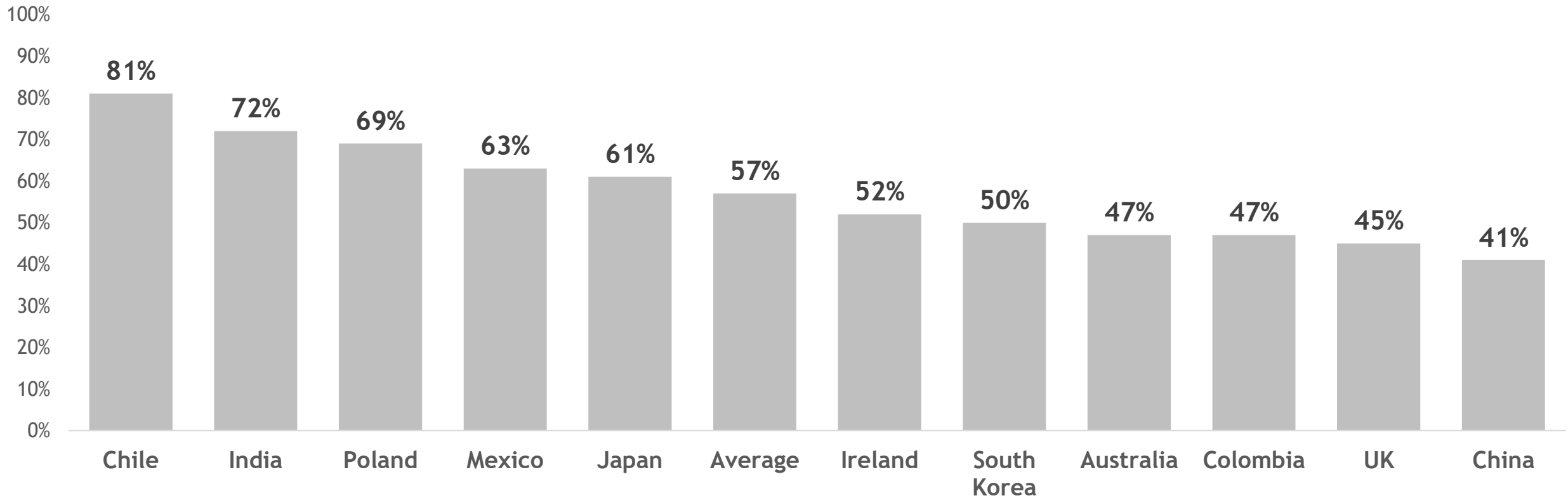
Q. In relation to the Corona Virus which of these aspects do you feel anxious about?

Those residing in Chile and Ireland are the most inclined to feel anxious about the lack of a vaccine.



4 in 5 of those living in Chile are very anxious about the health of people they care about

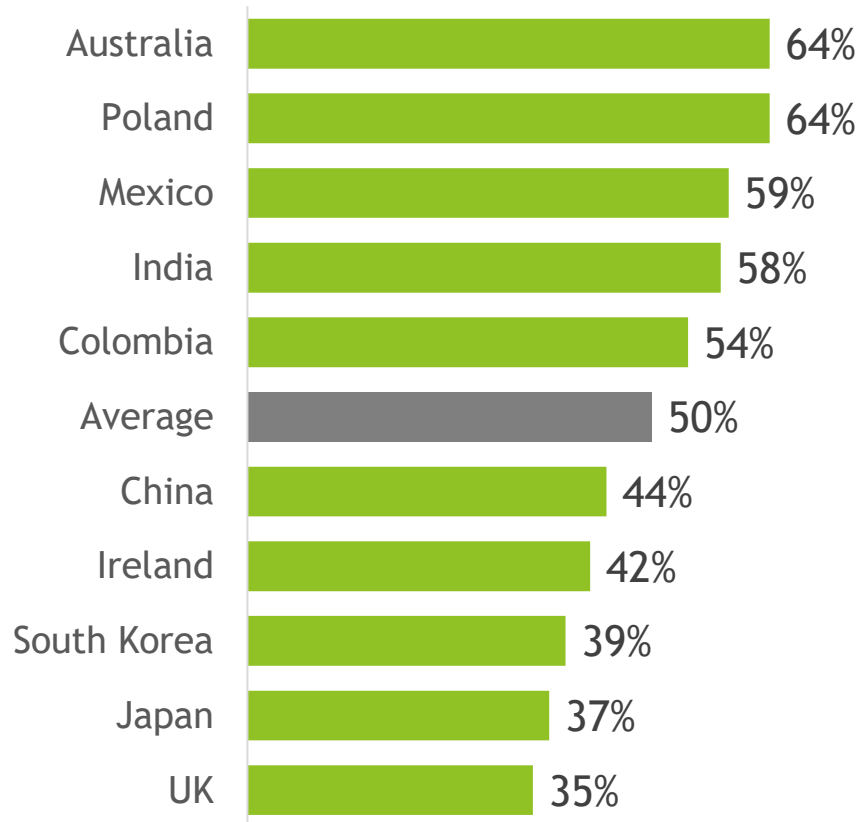
% concerned about physical & mental health of the people they care about (8-10)



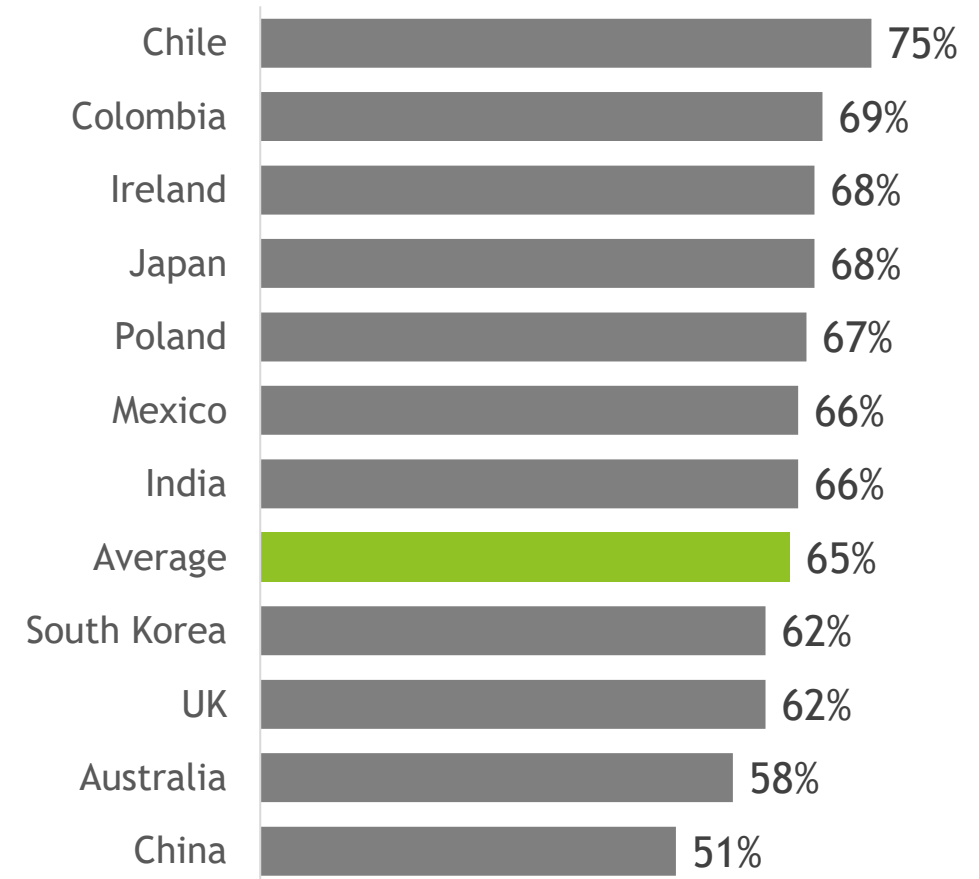
Q.14 On a scale of 1-10 how concerned or otherwise are you about the health (physical and mental) of people you care about?

Interest in health & well-being online

% Pilates/yoga/Exercise live with an instructor online

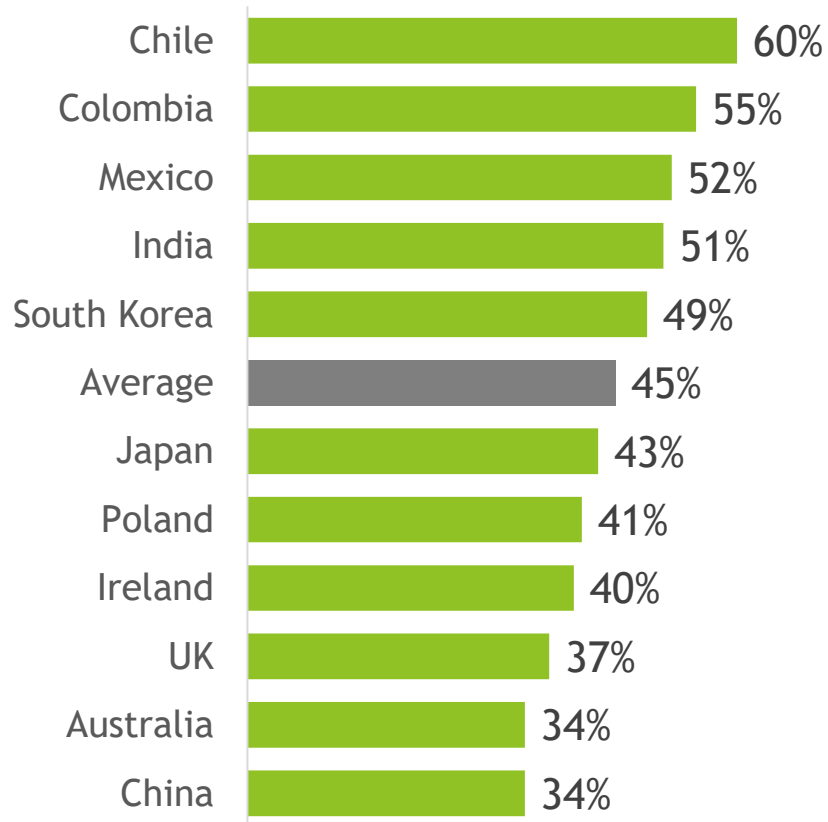


% Health appointments/digital health

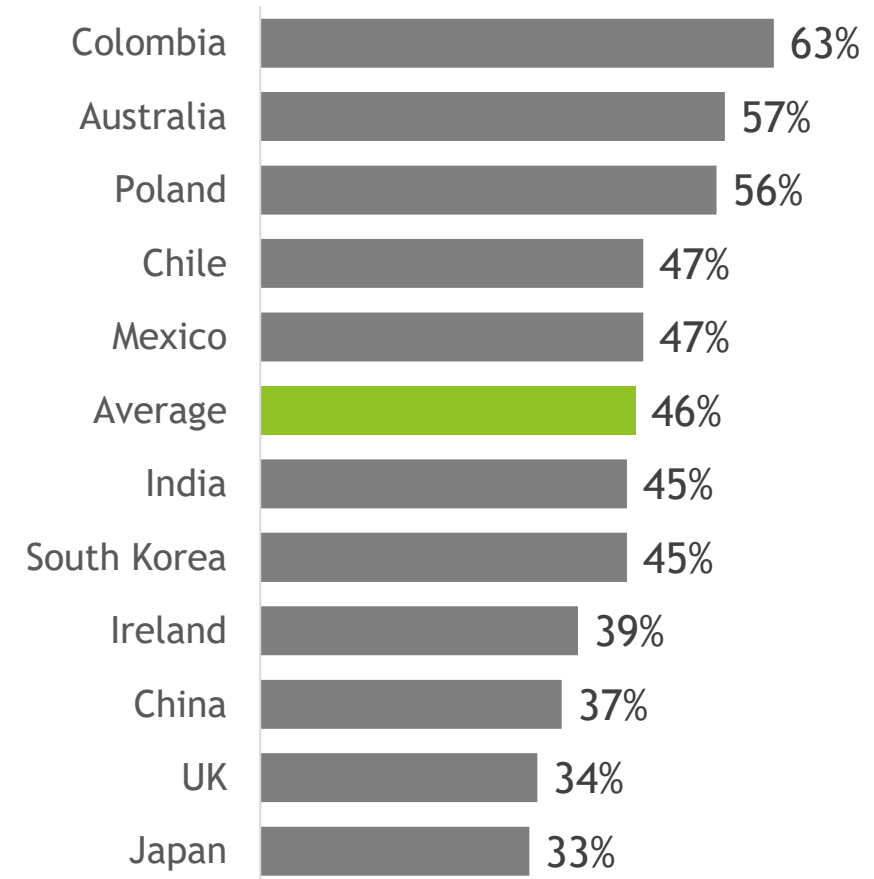


Interest in mental health well-being & social connections online

% Stress counselling /mental health

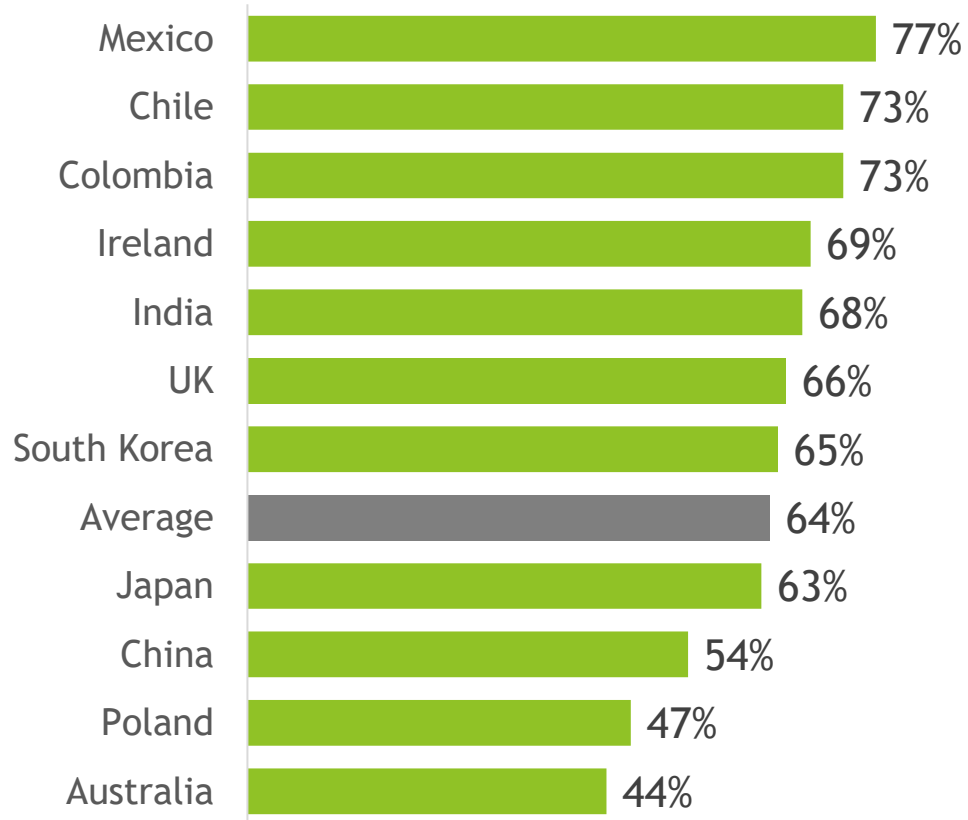


% Dinner with extended family online

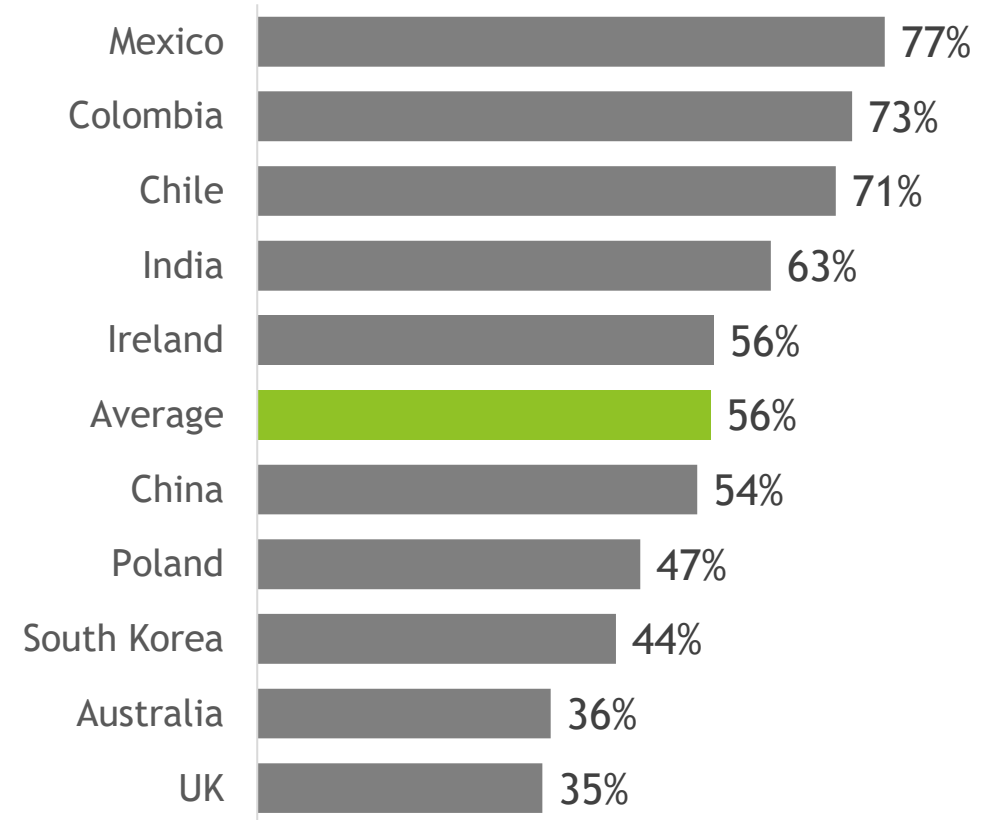


Interest in grocery shopping & classes/education online

% Grocery Shopping

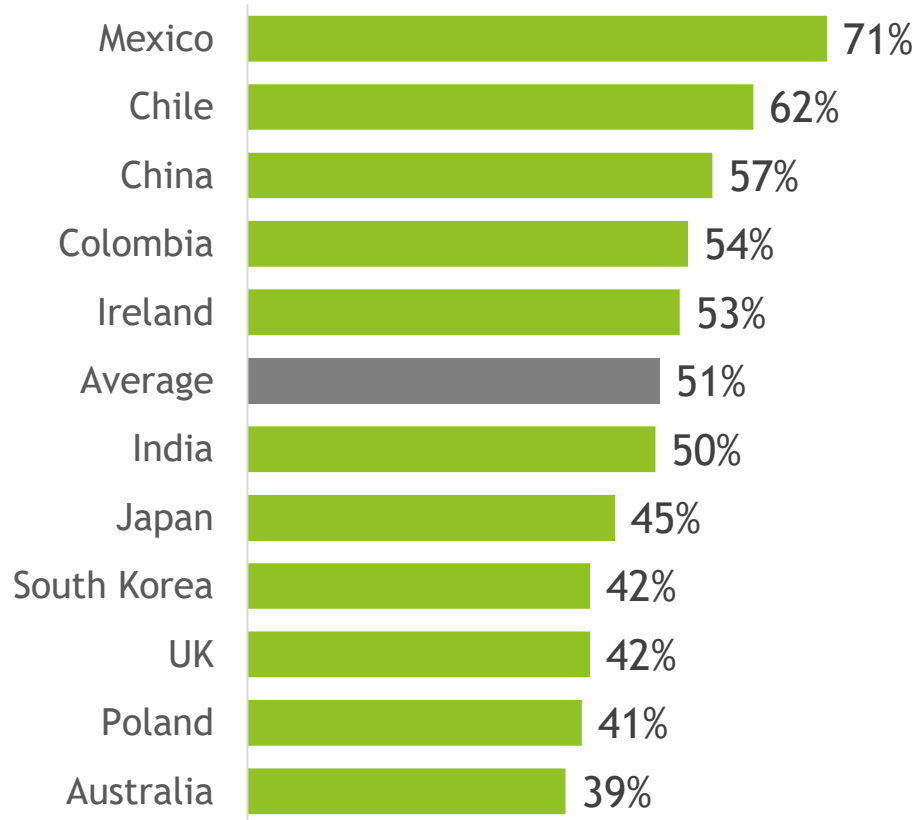


% Classes/Education

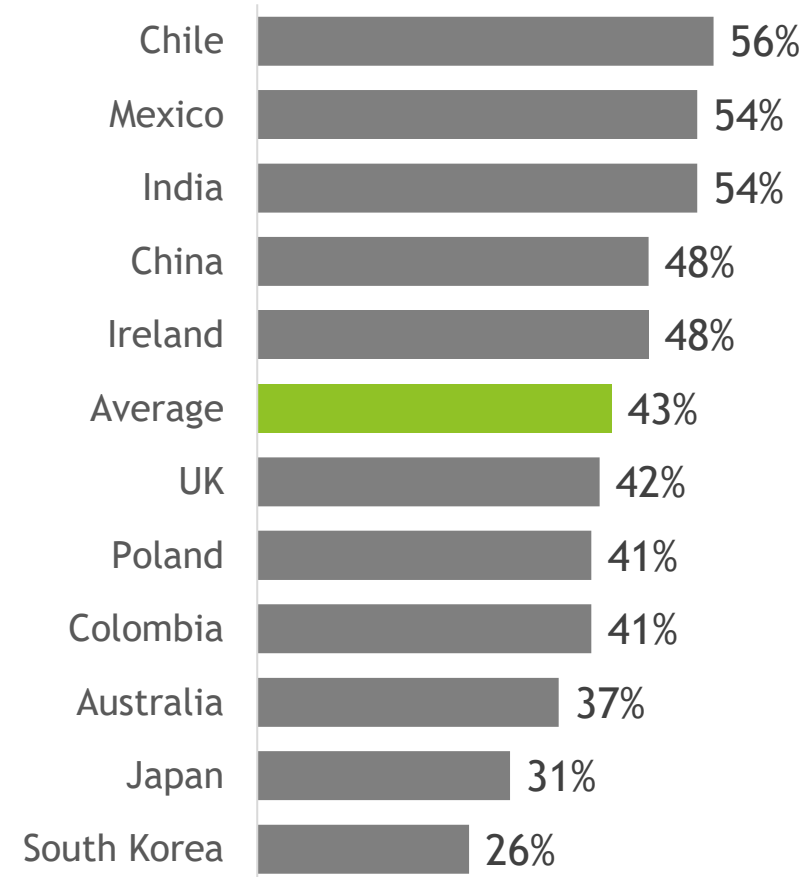


Interest in cooking & baking online

% Cooking

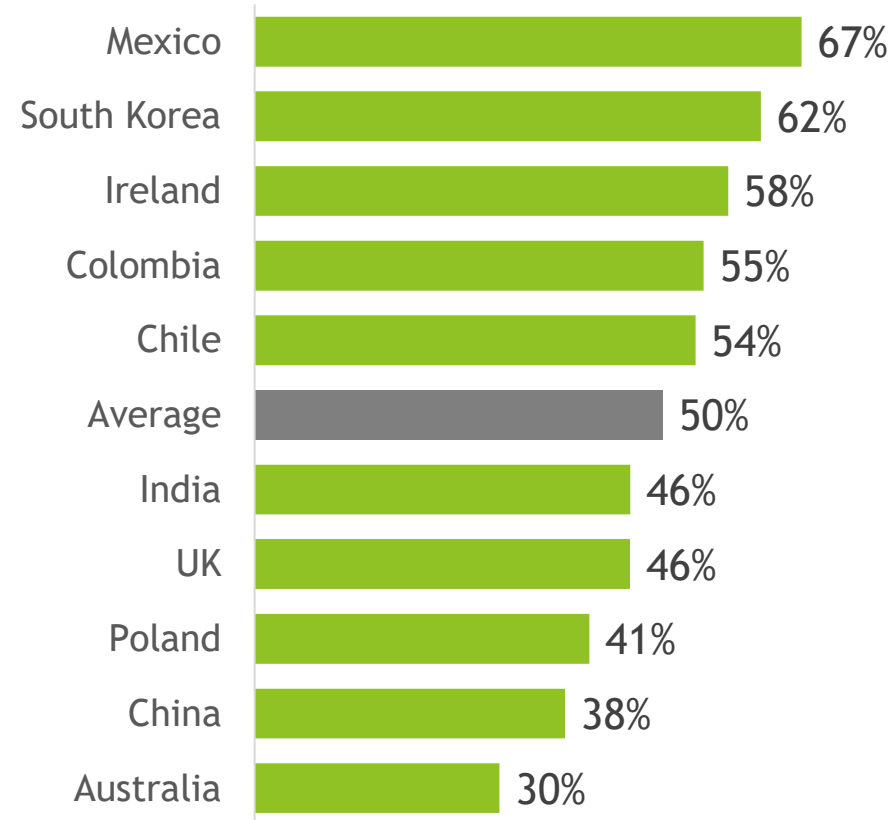


% Baking



Interest in ordering take-out online

% Order take-away instead of dining out



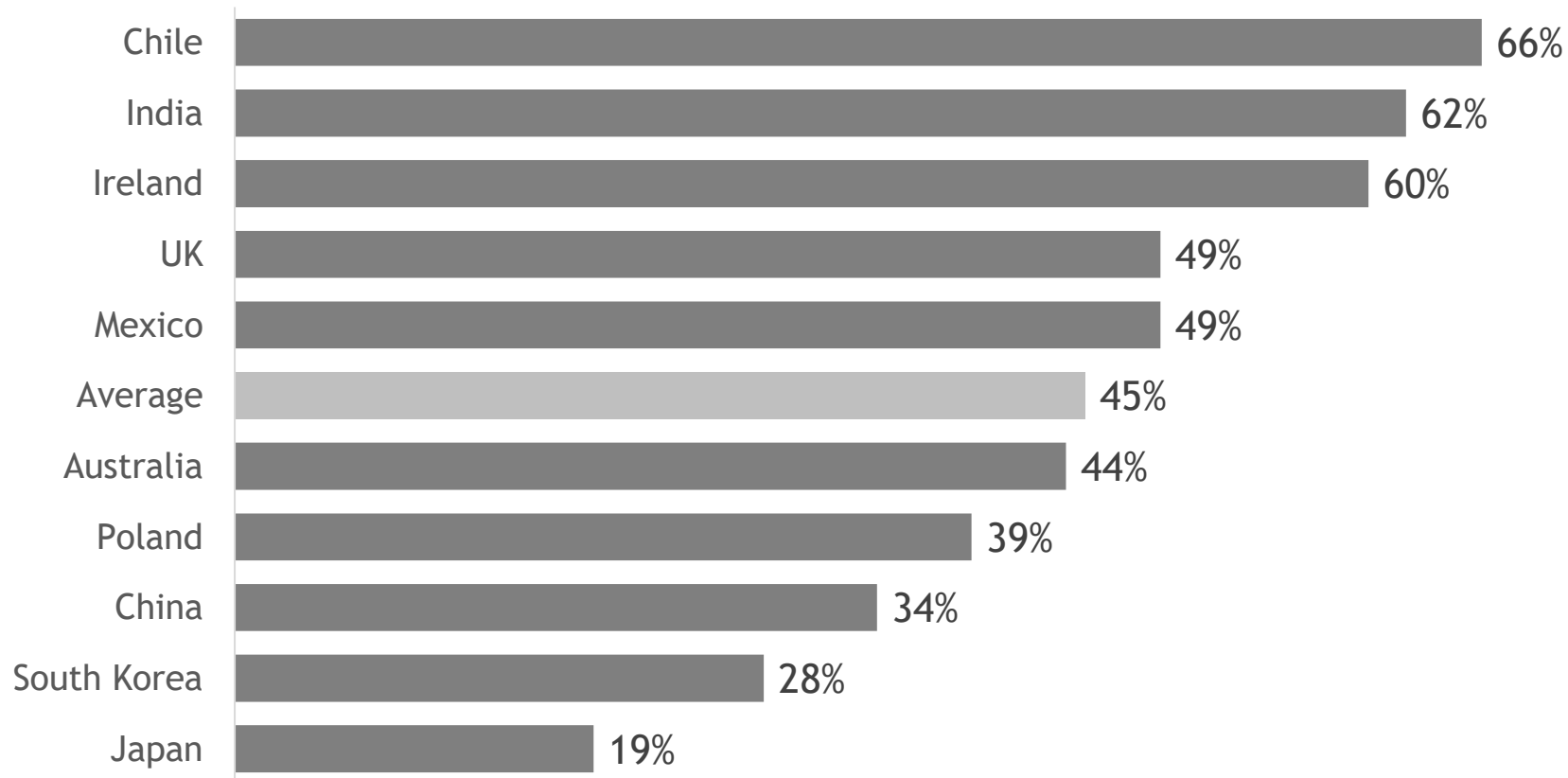


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4. Understanding & attitudes

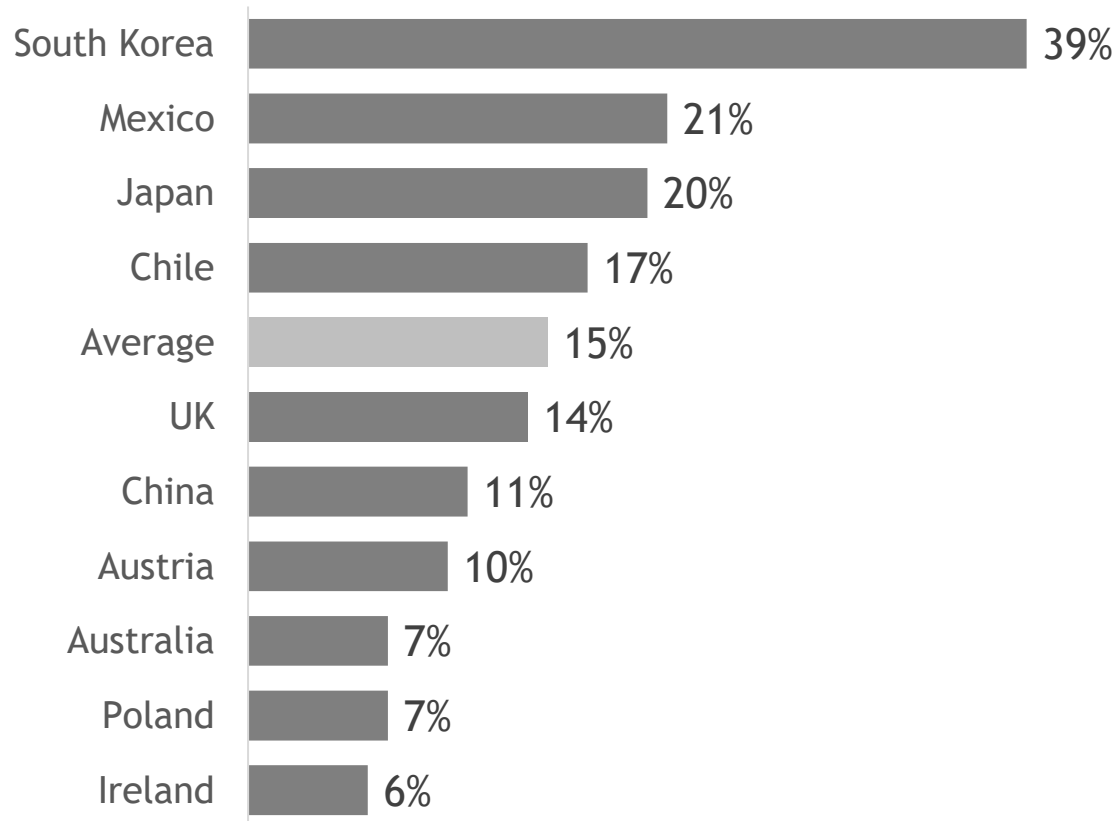
Clarity on what the symptoms of COVID-19 are is required for many in most countries

% indicate they are very clear on what the symptoms of COVID-19 are



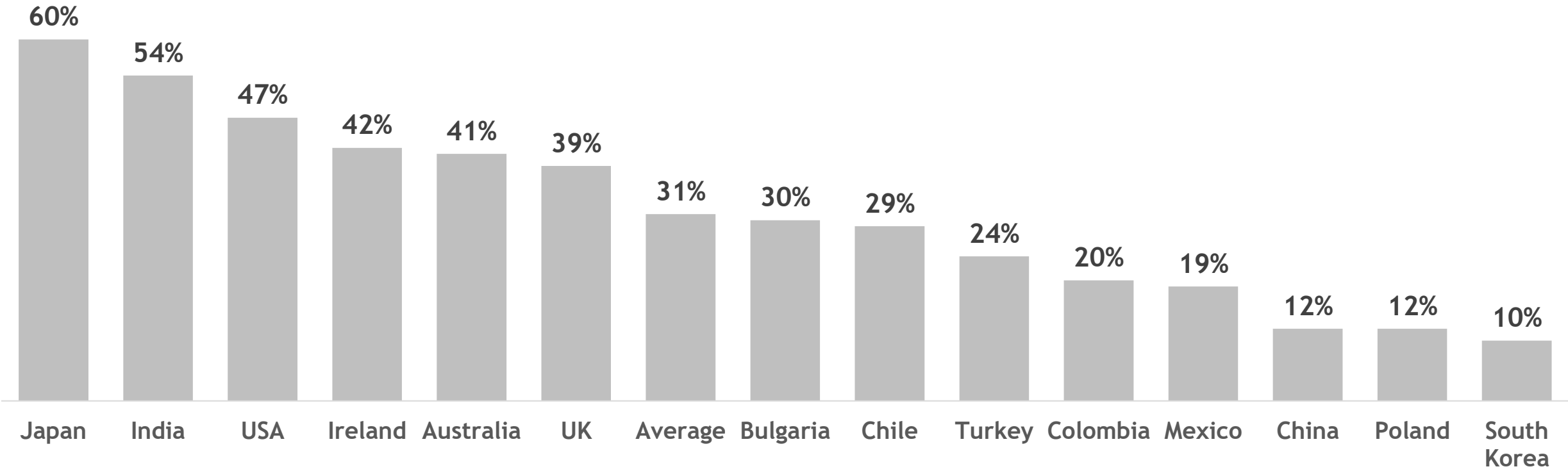
2 in 5 South Korean residents concerned they have may contracted the virus although they have not been tested

% indicate are worried they have the virus although have not been tested



There are high levels of concern evident in most countries about the pandemic overall, particularly so in Japan, India and the US.

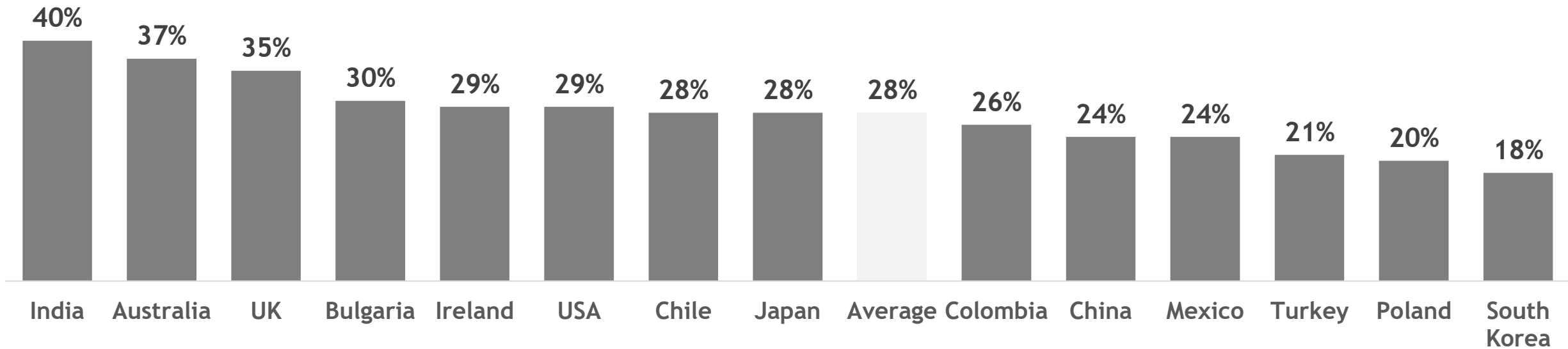
% extremely concerned about the pandemic



Those in India, Australia and the UK are the most likely to suggest they are extremely concerned about contracting the virus



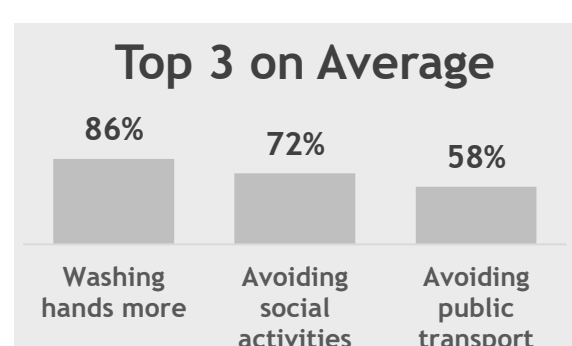
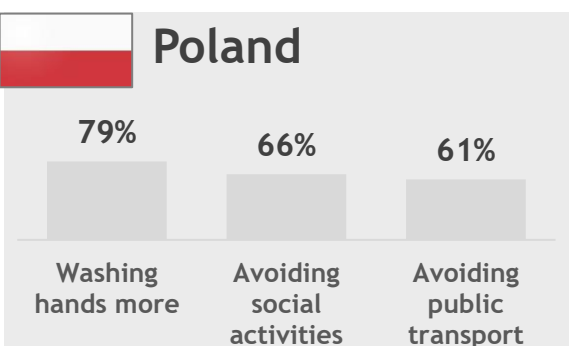
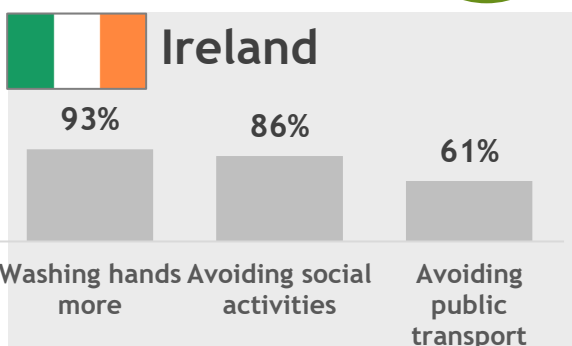
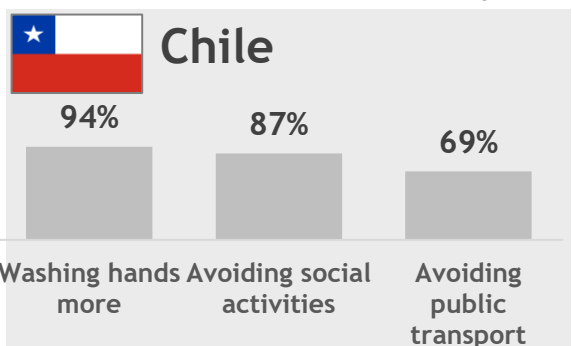
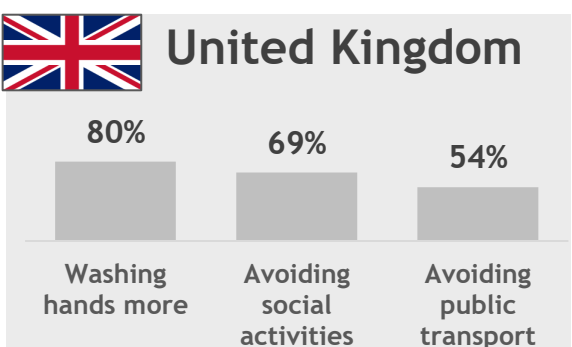
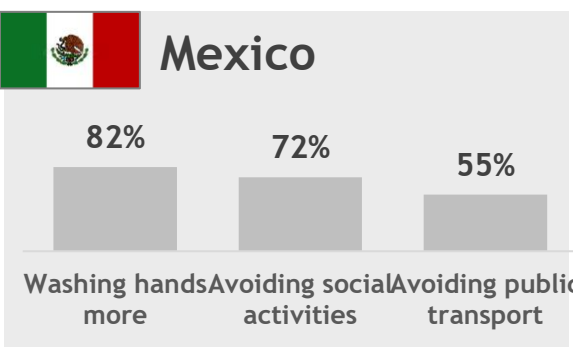
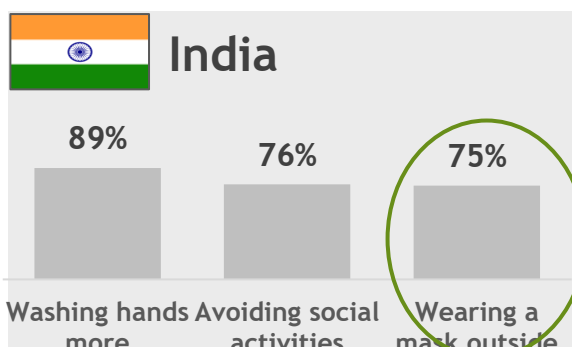
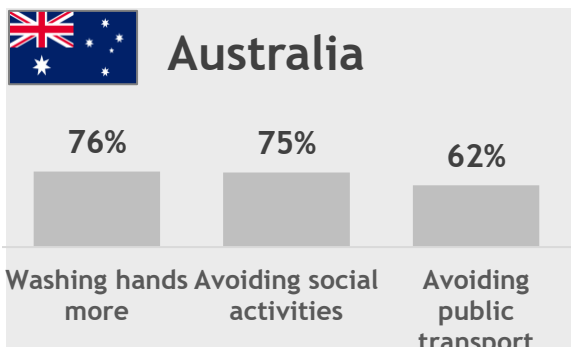
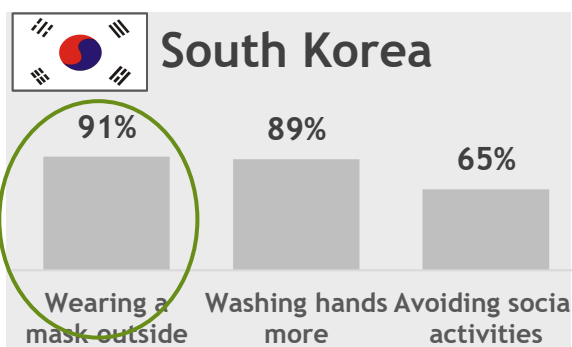
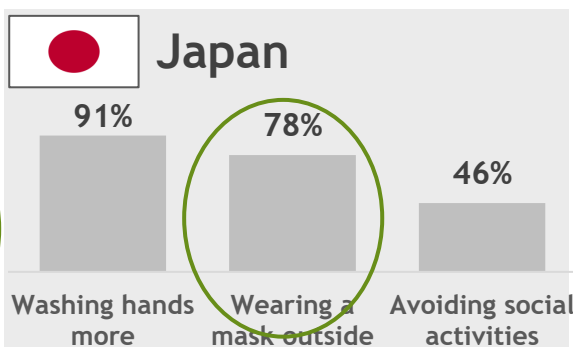
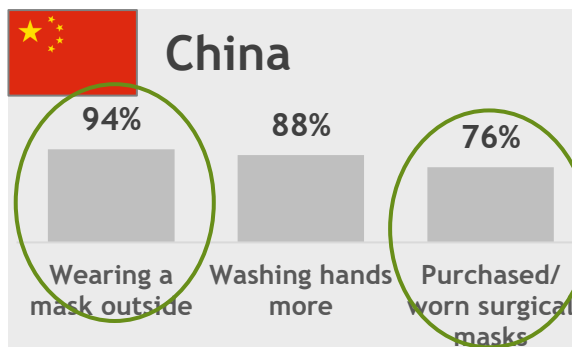
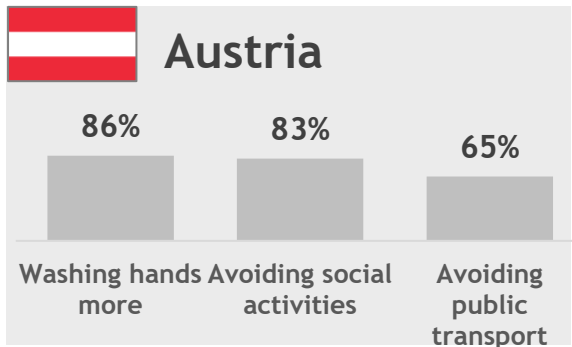
% extremely concerned about contracting the virus



Masks are much more common in Asian countries than in Europe or Central and South America



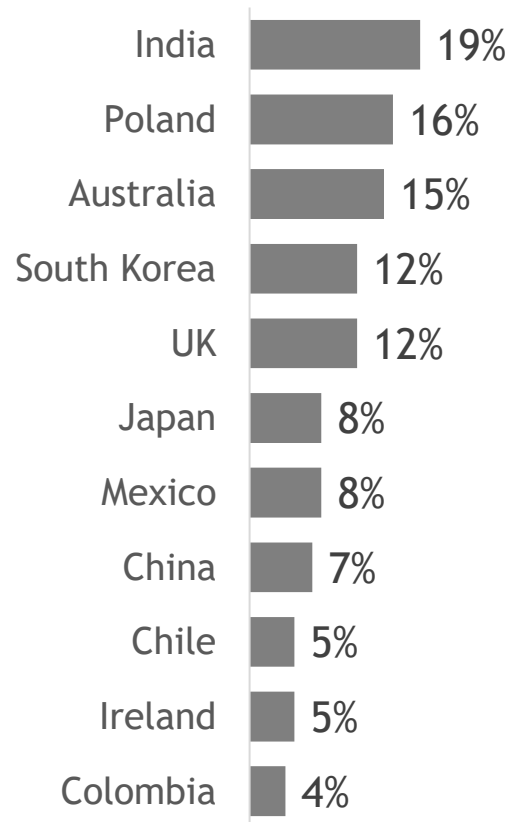
% Most common actions taken to avoid infection/impact of COVID-19



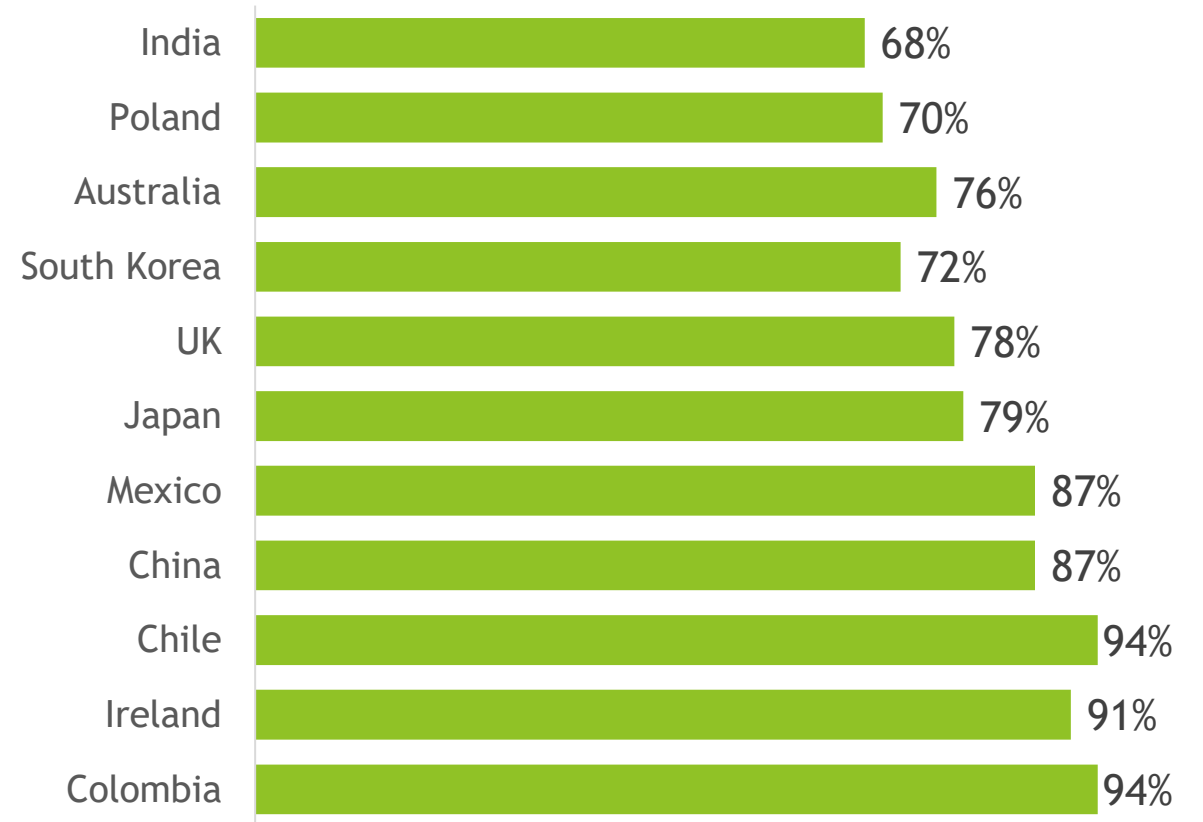
Q.8 What actions are you currently taking in order to avoid being infected with or impacted by COVID-19/Coronavirus?

'I don't know what everyone is so worried about, its just a mild form of flu'

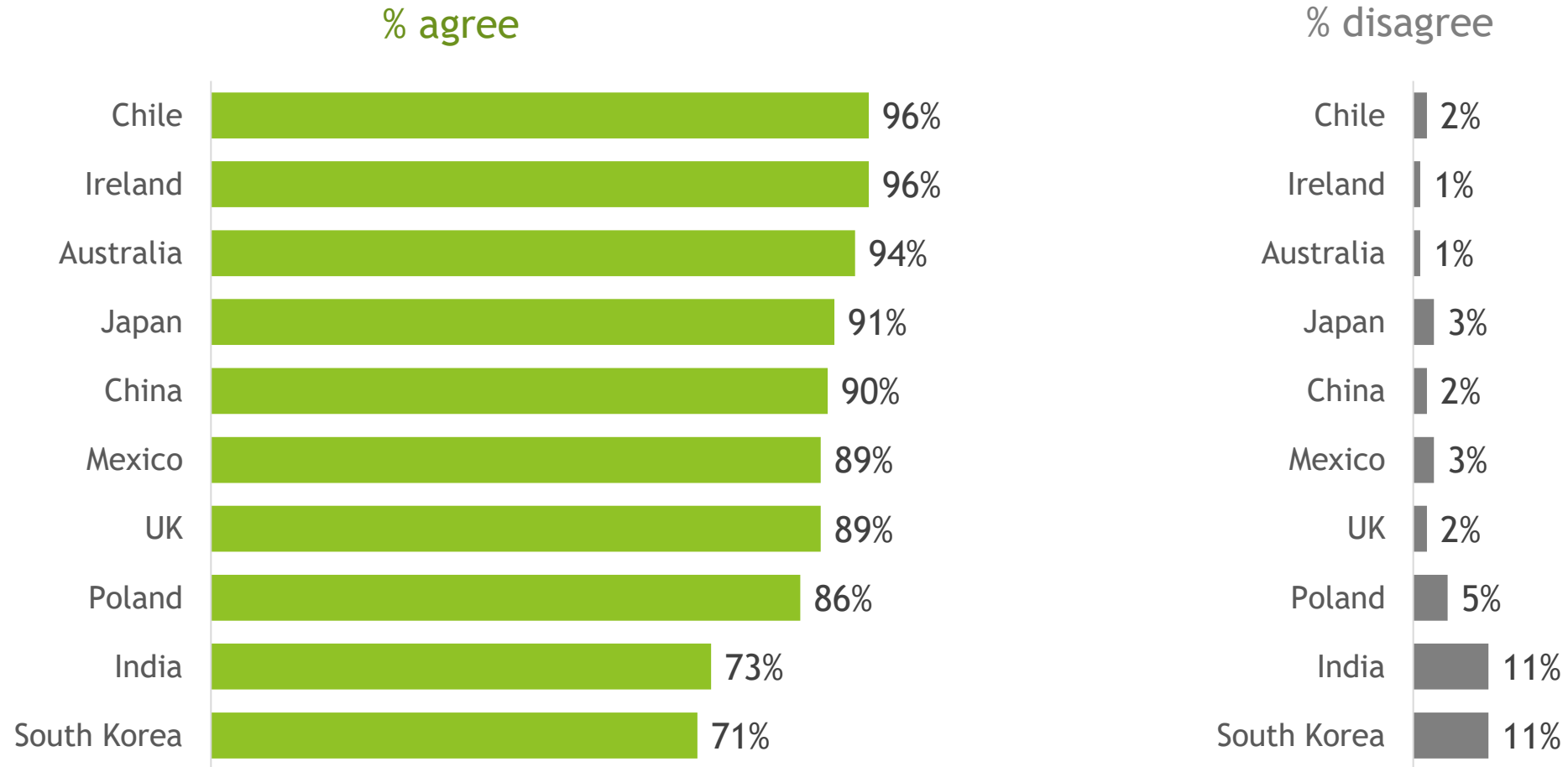
% agree



% disagree

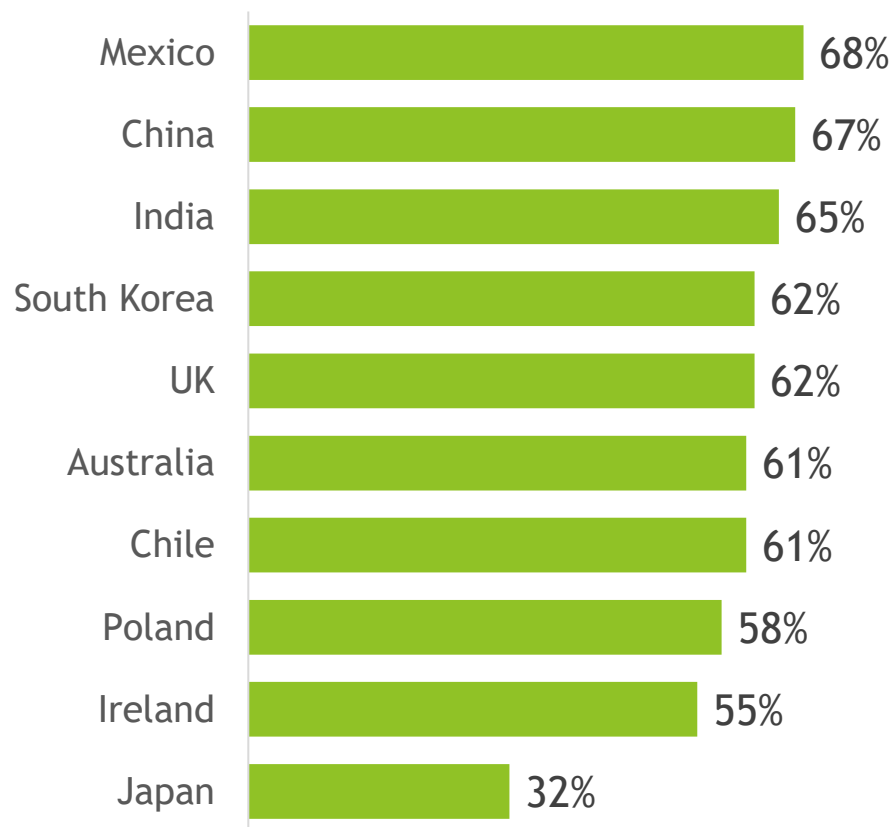


‘People who may have COVID-19 but who are not experiencing symptoms can pass on the virus just as easily as those who have symptoms’

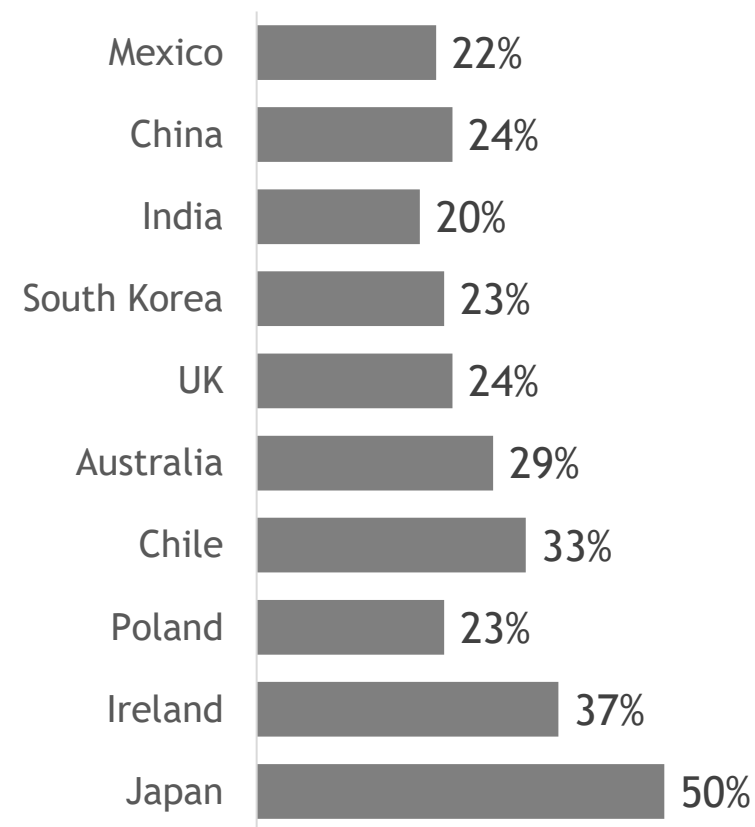


‘The virus can only be passed on through close contact - particularly if that person coughs near you.’

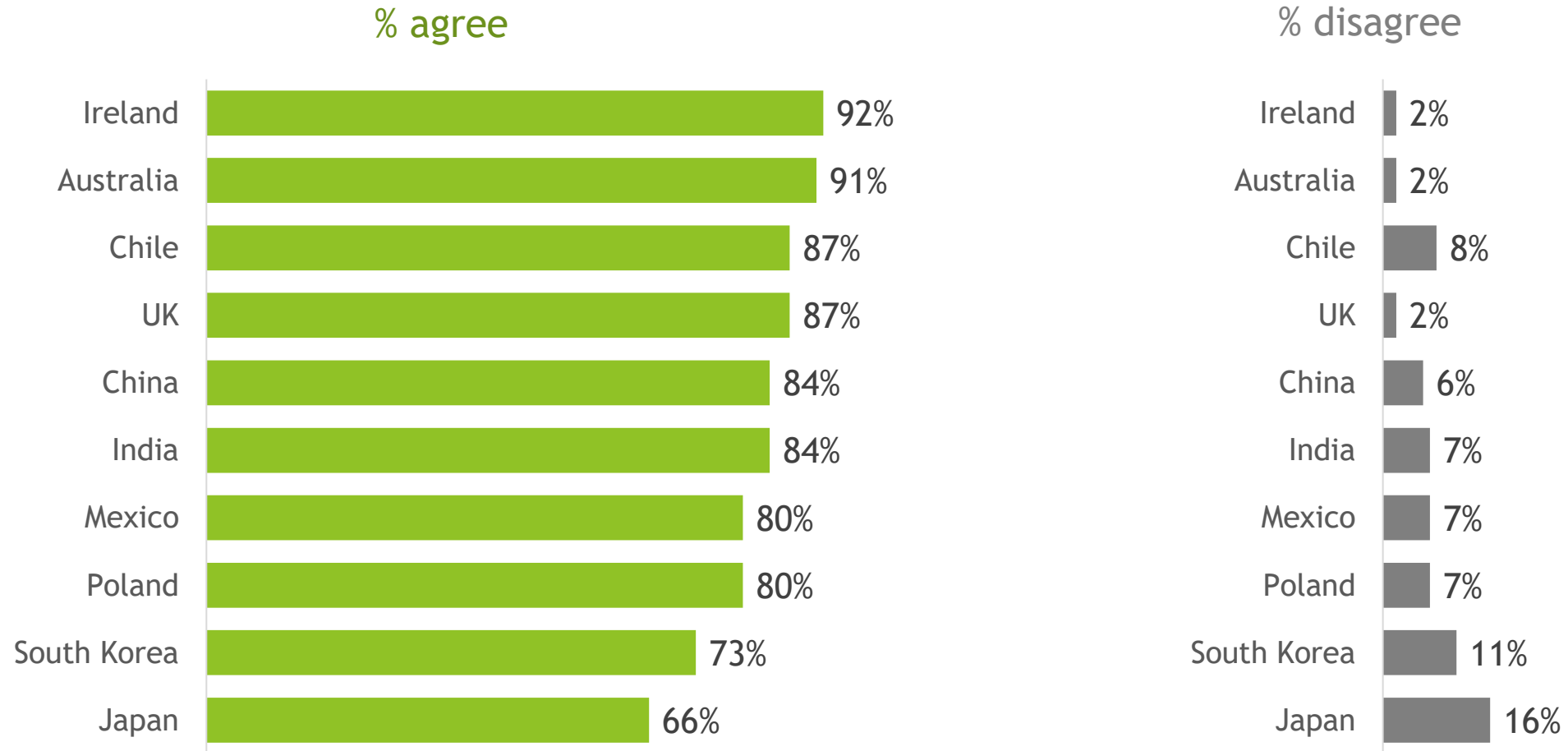
% agree



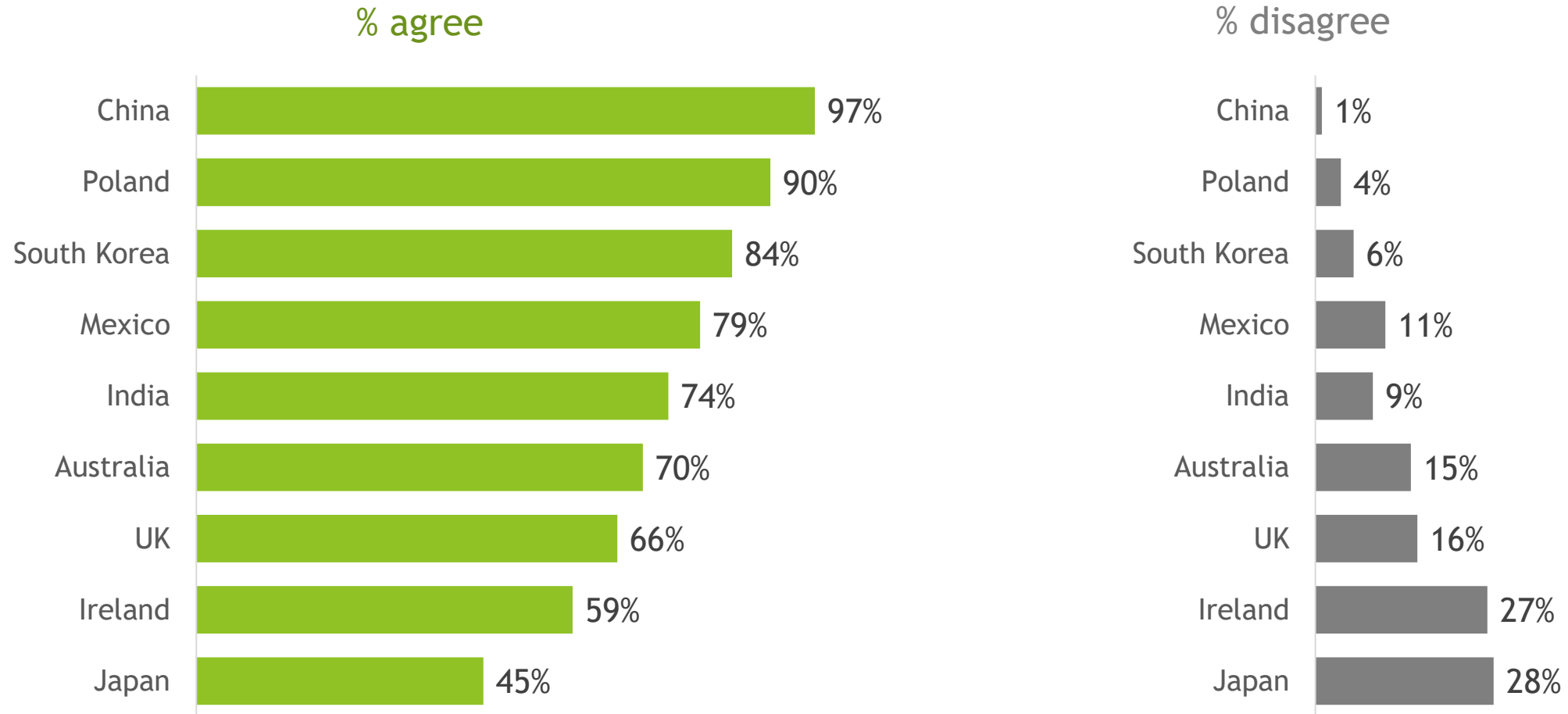
% disagree



‘The virus can be passed on through touching items that people with the virus have touched.’

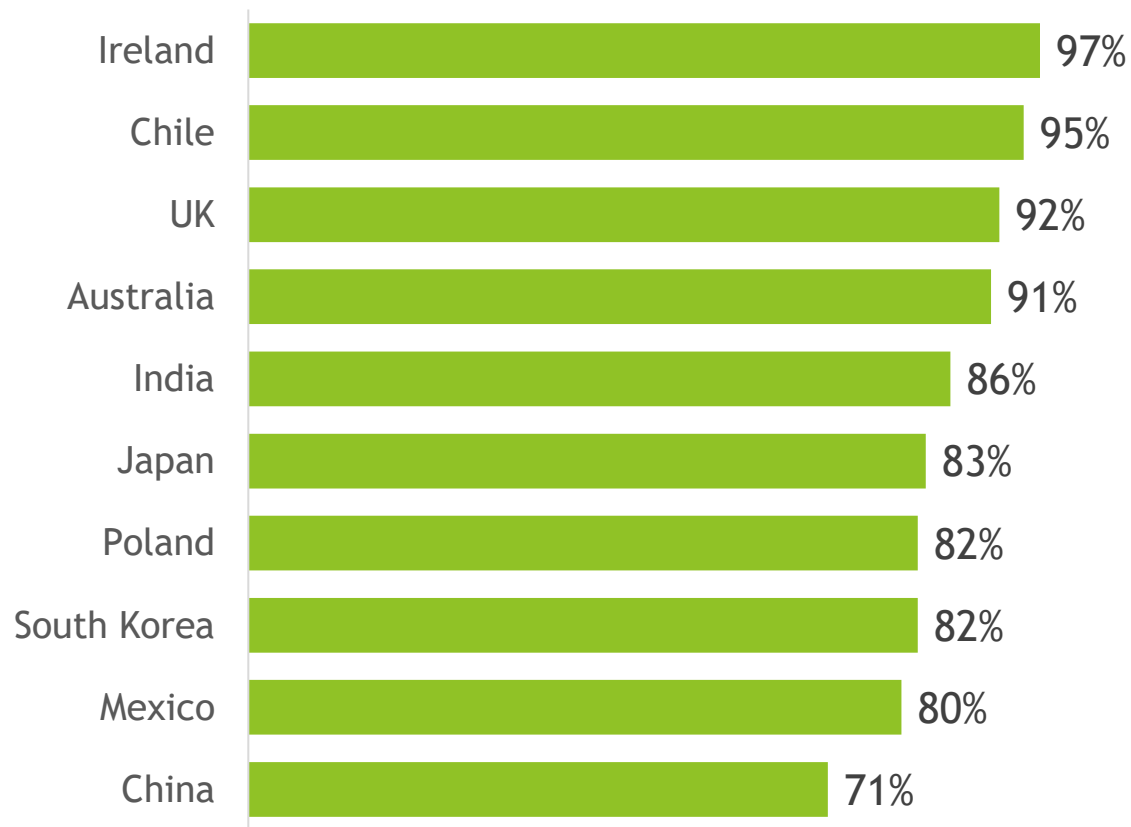


‘The virus can be transmitted through droplets. Wearing a mask is the best way to protect yourself and others from being infected.’

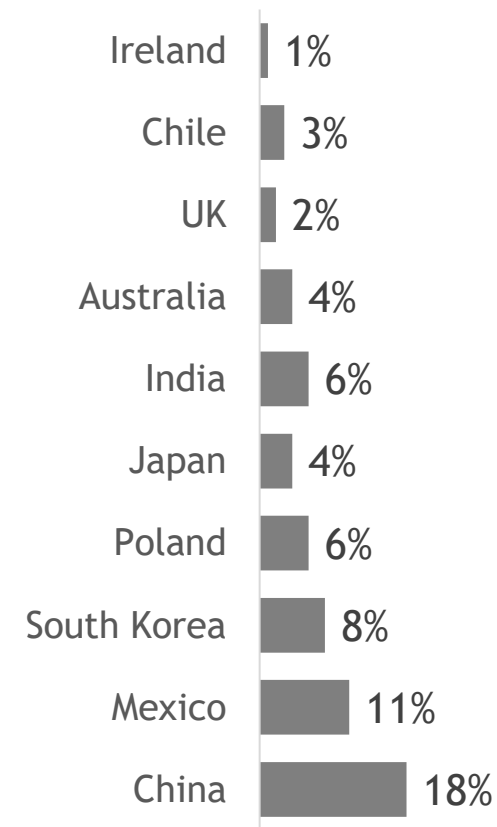


‘Everyone needs to act like they have the virus and maintain social distancing.’

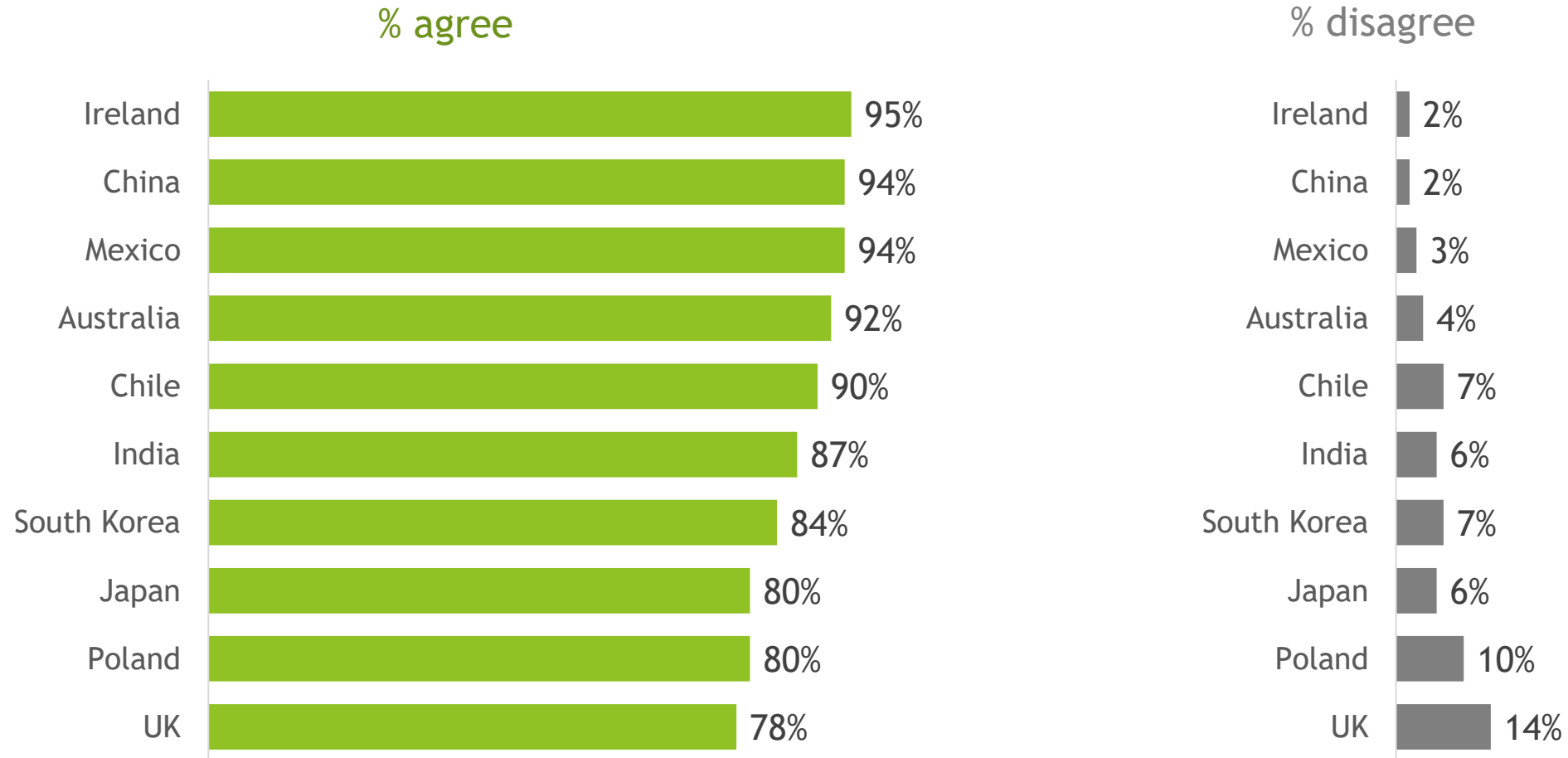
% agree



% disagree

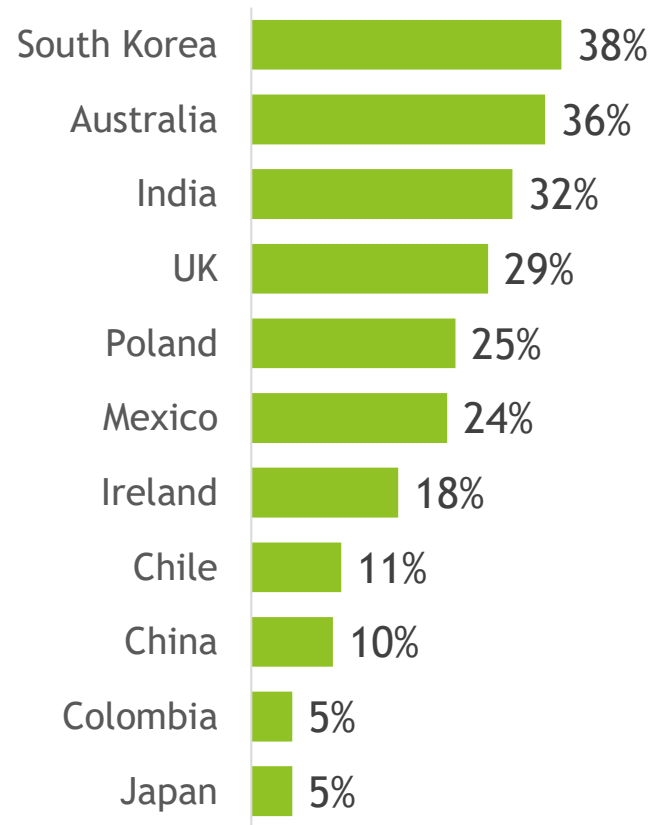


‘If anyone feels unwell they must isolate themselves and contact their GP.’

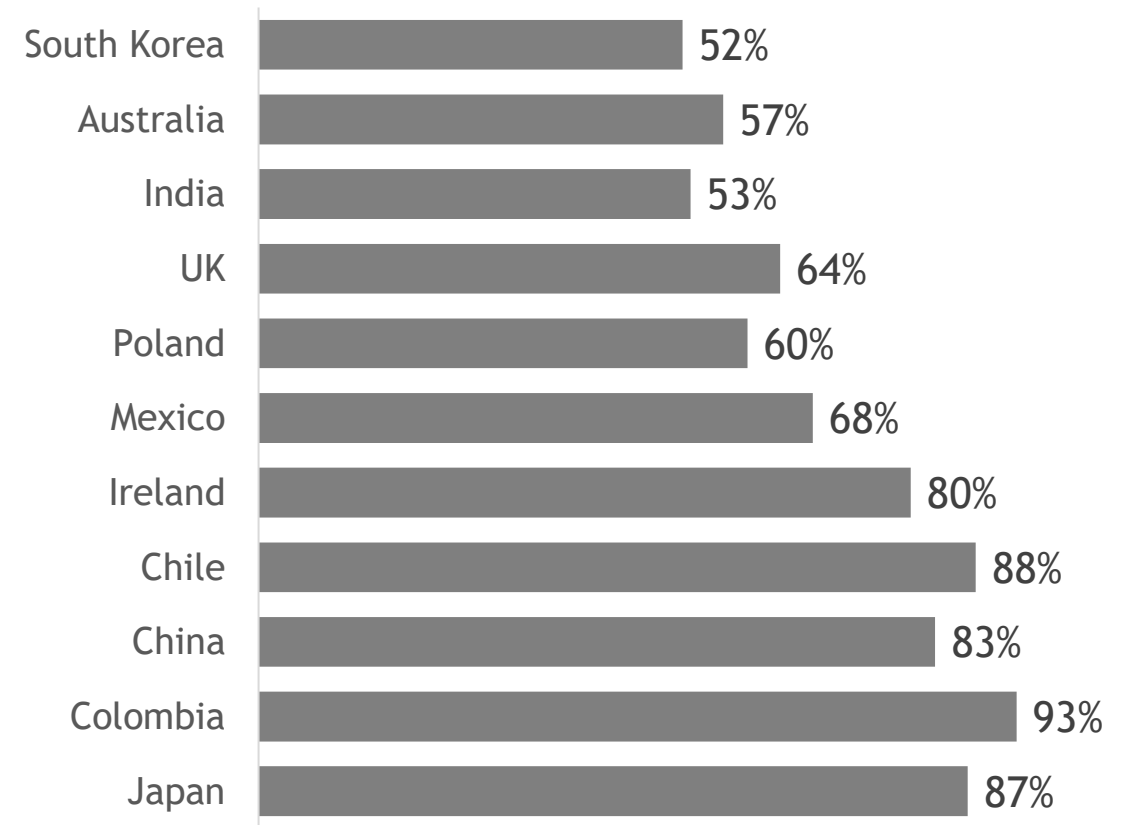


‘Only those over 70 or those who have a health issue need be concerned about contracting COVID-19.’

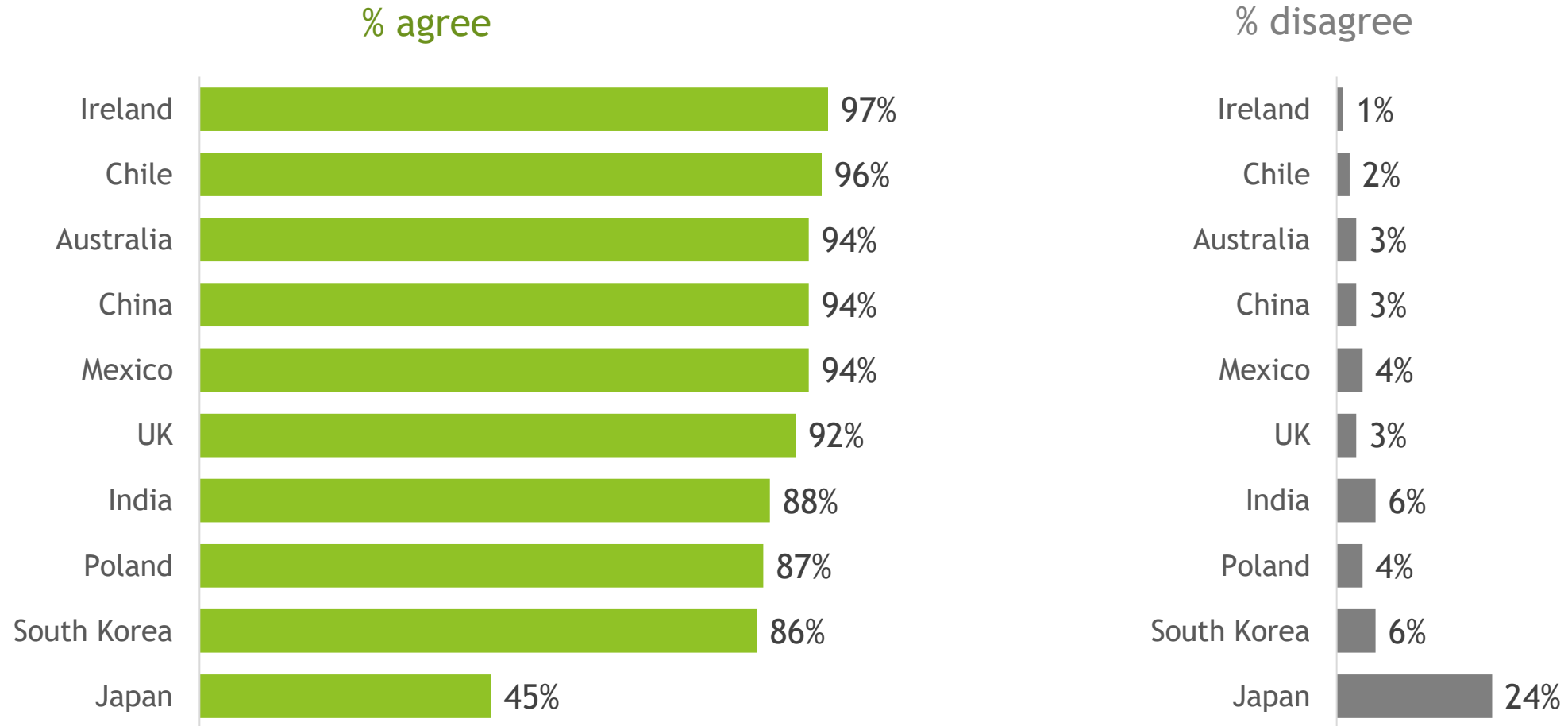
% agree



% disagree



'I am practicing social distancing.'





MARKET
RESEARCH
WORLDWIDE

COVID-19 Public Sentiment Survey

IRIS Multi-Country Study

April 2020