

GWI

# Coronavirus Research | March 2020

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# Introduction

Coronavirus is on all of our minds, screens and feeds – and for good reason.

The outbreak is causing fluid and unpredictable changes to our day-to-day lives, and businesses everywhere are understandably worried about the impact it will have on them.

At GlobalWebIndex, we want to help keep you clued into what's happening across the consumer landscape: how people are reacting, how behaviors are shifting, where they're turning, and what this means for businesses of every kind.

That's why we're releasing this first dataset, collected between March 5-12 in the U.S. and UK. We'll be following this with further releases, exploring the impact of Coronavirus on particular sectors and on consumer behaviors more generally, as well as keeping track of how sentiments and concerns are shifting.

NOTE: All stats in this report are from a GlobalWebIndex March 2020 custom survey among 2,310 (U.S.) and 2,229 (UK) internet users aged 16-64.

## Audience Definitions:

### Generations:

- **Gen Z – 16-23 years-old**
- **Gen Y – 24-37 years-old**
- **Gen X – 38-56 years-old**
- **Baby boomers – 57-64 years-old**

### Income (based on annual household income):

- **Lower income (U.S.) – \$32,000 or less**
- **Higher income (U.S.) – \$85,000 or more**
  
- **Lower income (UK) – £24,000 or less**
- **Higher income (UK) – £60,000 or more**

## Consumer Concerns

In general, **concerns about other people outweigh those surrounding personal exposure to the virus**. Topping the list are the progress of the virus, the lack of a vaccine and the chances of friends, family or high-risk groups being infected – all of these come ahead of the fear of catching it personally.

Concerns over the risk of the virus to the elderly increase directly in line with age. Surprisingly, concerns over catching the virus individually *decrease* in line with age, despite younger people supposedly being less at risk.

**Fears around the rapid spread of the virus are most pronounced in the U.S.**, whereas in the UK the primary concern is the risk of the virus on vulnerable individuals such as the elderly.

Currently, **only 20% are concerned about the impact it will have on their personal finances (dropping to 12% among Gen Zs)**. Interestingly, it's also one of the areas of concern where there's minimal difference between high vs lower income groups (just 5 percentage points); that suggests that consumers in all income brackets haven't yet begun considering the longer-term impact on their family finances, and are still more focused on the immediate spread.

Concerns over the ability of medical providers to do sufficient testing of people who might be sick are much higher in the U.S. (34%) compared to the UK (23%), and are also much more pronounced among older people.

|                                                                                   | All | U.S. | UK | Gen Z | Gen Y | Gen X | Boomers | Lower Inc | Higher Inc |
|-----------------------------------------------------------------------------------|-----|------|----|-------|-------|-------|---------|-----------|------------|
| The speed at which the virus is spreading                                         | 54  | 55   | 45 | 52    | 51    | 58    | 51      | 56        | 52         |
| My family / friends catching the virus                                            | 53  | 52   | 56 | 52    | 52    | 55    | 51      | 53        | 38         |
| Risks to the elderly / people who are already sick                                | 49  | 47   | 56 | 42    | 44    | 52    | 60      | 47        | 42         |
| Not having a vaccine available yet                                                | 47  | 48   | 38 | 52    | 41    | 51    | 42      | 50        | 45         |
| Myself catching the virus                                                         | 45  | 45   | 41 | 51    | 46    | 41    | 42      | 46        | 33         |
| Hospitals not being properly equipped to manage / control the virus               | 43  | 44   | 40 | 42    | 42    | 45    | 45      | 45        | 30         |
| Inaccurate information about the virus                                            | 40  | 40   | 37 | 37    | 38    | 44    | 34      | 38        | 37         |
| The lack of research / unknowns surrounding the virus                             | 35  | 36   | 31 | 32    | 36    | 35    | 35      | 35        | 29         |
| Failure of medical providers to do sufficient testing of people who might be sick | 32  | 34   | 23 | 29    | 30    | 35    | 33      | 31        | 27         |
| Shortages of medical supplies (e.g. face masks)                                   | 32  | 33   | 23 | 27    | 33    | 33    | 31      | 30        | 25         |
| Risks to healthcare professionals                                                 | 30  | 31   | 27 | 22    | 28    | 36    | 29      | 30        | 33         |
| Countries not being able to work together to fight the virus                      | 28  | 29   | 23 | 28    | 28    | 28    | 24      | 26        | 24         |
| The impact it might have on my personal finances                                  | 20  | 20   | 19 | 12    | 25    | 20    | 20      | 15        | 20         |
| Other                                                                             | 6   | 7    | 4  | 6     | 7     | 6     | 5       | 10        | 3          |
| I'm not worried about anything right now                                          | 6   | 6    | 8  | 3     | 3     | 8     | 12      | 8         | 3          |

Question: When thinking about COVID-19 / coronavirus, which of the following, if any, are you most worried about? Please select all that apply.

## Knowledge Levels

When we ask consumers to identify fact from fiction in terms of Coronavirus, boomers are the most likely to know how to minimize the risks of infection (e.g. by avoiding touching their eyes, noses or mouths with unwashed hands).

Boomers are also the least likely to select any of the urban myths that have been circulating in some corners – as an example, Gen Zs are almost 60% more likely than boomers to believe in urban myths around the virus.

|                                                                                                              | All | U.S. | UK | Gen Z | Gen Y | Gen X | Boomers | Lower Inc | Higher Inc |
|--------------------------------------------------------------------------------------------------------------|-----|------|----|-------|-------|-------|---------|-----------|------------|
| The virus can spread to people of any age                                                                    | 73  | 72   | 80 | 65    | 69    | 79    | 79      | 71        | 70         |
| Washing your hands frequently / using hand sanitizer is a recommended precaution to keep healthy             | 72  | 69   | 84 | 61    | 64    | 79    | 84      | 69        | 72         |
| People of any race / ethnicity can catch the virus                                                           | 71  | 69   | 78 | 58    | 67    | 77    | 81      | 68        | 67         |
| Avoiding touching your eyes, nose, and mouth with unwashed hands is a recommended precaution to keep healthy | 70  | 69   | 76 | 63    | 65    | 75    | 79      | 66        | 70         |
| The new coronavirus causes symptoms similar to the cold and flu e.g. high fever, cough                       | 68  | 66   | 80 | 59    | 65    | 73    | 76      | 62        | 68         |
| It's possible to catch the infection from someone who doesn't feel unwell                                    | 54  | 53   | 59 | 42    | 56    | 57    | 58      | 52        | 59         |
| The new coronavirus is more dangerous than the winter flu                                                    | 43  | 44   | 38 | 34    | 45    | 46    | 44      | 41        | 48         |
| Most people recover from the disease without needing special treatment                                       | 37  | 32   | 63 | 22    | 41    | 39    | 38      | 29        | 38         |
| Taking traditional herbal medicines are not effective against the virus                                      | 27  | 26   | 29 | 30    | 26    | 27    | 23      | 23        | 37         |
| <i>The virus can be caught from packages / parcels*</i>                                                      | 16  | 17   | 14 | 14    | 20    | 14    | 18      | 14        | 16         |
| Thoroughly cooking meat and eggs is recommended to prevent infection spread                                  | 14  | 14   | 9  | 14    | 20    | 10    | 6       | 10        | 13         |
| <i>Spraying alcohol or chlorine on your body can kill the new coronavirus*</i>                               | 11  | 10   | 11 | 6     | 16    | 8     | 10      | 7         | 10         |
| <i>If I wear a face mask, I definitely won't catch the virus*</i>                                            | 9   | 11   | 2  | 13    | 12    | 9     | 0       | 7         | 19         |
| <i>Antibiotics can help prevent and treat the new coronavirus*</i>                                           | 9   | 10   | 4  | 7     | 13    | 8     | 5       | 7         | 9          |
| <i>Regularly rinsing your nose with saline can prevent infection*</i>                                        | 8   | 9    | 3  | 5     | 16    | 6     | 1       | 7         | 8          |
| <i>Vaccines against pneumonia can protect against the new coronavirus*</i>                                   | 8   | 9    | 3  | 5     | 13    | 5     | 4       | 5         | 9          |
| <i>Hand dryers effectively kill the virus*</i>                                                               | 7   | 8    | 3  | 7     | 13    | 4     | 2       | 5         | 7          |
| <i>Eating garlic can help protect people against the new coronavirus*</i>                                    | 5   | 5    | 2  | 2     | 10    | 3     | 2       | 2         | 7          |
| Other                                                                                                        | 6   | 6    | 2  | 3     | 7     | 6     | 6       | 9         | 3          |
| None of the above is true                                                                                    | 4   | 4    | 5  | 3     | 3     | 5     | 8       | 5         | 4          |

Question: Which of the following, if any, do you believe to be true about COVID-19 / coronavirus? **Options in italic and marked with \* are untrue**

## Attitudes towards information on staying healthy

If asked whether they have enough information about the recommended precautions to take to stay healthy, we found that 50% believe they do, 29% believe they need more, and 21% aren't sure.

This masks some important differences. **Younger age groups, particularly Gen Zs, believe they don't currently have enough** and that they need more, whereas older groups are much more likely to believe they have enough information.

**UK consumers (60%) are notably more confident than those in the U.S. (48%)** to believe they have enough information on the topic.

Income also plays a major role; **lower income groups are much more likely than higher earners to be in need of more information.**

The group who believe urban myths to be true are also fairly open about their limited understanding, as they're more likely to say they need more information on the topic.

|                                     | All | U.S. | UK | Gen Z | Gen Y | Gen X | Boomers | Lower Inc | Higher Inc |
|-------------------------------------|-----|------|----|-------|-------|-------|---------|-----------|------------|
| Yes, I have enough information      | 50  | 48   | 60 | 41    | 52    | 52    | 56      | 41        | 65         |
| No, I don't have enough information | 29  | 30   | 22 | 41    | 31    | 23    | 22      | 33        | 23         |
| I'm not sure                        | 21  | 22   | 17 | 18    | 17    | 26    | 22      | 26        | 12         |

Question: Do you feel you have enough information about the recommended precautions to take to stay healthy?

## Trust in information on infection and mortality rates

A major concern in both the UK and U.S. is around **inaccurate information about the virus - 40% say they're concerned about this**. These concerns are shared fairly evenly between age, country and income levels.

Despite this, there are strong levels of trust in the reported figures shared so far about infection / mortality rates overall. Almost half in the UK and U.S. do trust these reported figures.

The rate of those who say they do not trust the reported figures is significantly lower (at 15% in both countries). For the most part, many are unsure rather than lacking in trust.

Gen Z and baby boomers are more likely to say they're unsure about these reported figures rather than saying they trust them. Whereas millennials and Gen X are more likely to say they trust them.

|                      | All | U.S. | UK | Gen Z | Gen Y | Gen X | Boomers | Lower Inc | Higher Inc |
|----------------------|-----|------|----|-------|-------|-------|---------|-----------|------------|
| Do trust             | 45  | 46   | 42 | 36    | 58    | 41    | 37      | 34        | 62         |
| Do not trust         | 12  | 12   | 15 | 8     | 10    | 17    | 14      | 12        | 10         |
| Unsure               | 39  | 39   | 40 | 53    | 29    | 39    | 46      | 49        | 28         |
| Haven't seen figures | 3   | 4    | 3  | 4     | 3     | 4     | 3       | 5         | 1          |

Question: How much do you trust or not trust the reported figures that you see about infection / mortality rates?

## Behavioral changes: day-to-day routines

**Almost 90% of Gen Zs have made changes to their daily routine, dropping to 75% among baby boomers.**

Nearly 30% of UK/U.S. consumers say they have avoided or reduced going to busy public places. 20% have avoided or reduced going to restaurants and just over 15% say they've cancelled or reduced trips to other countries.

Some **40% are reading the news more frequently** in order to stay up-to-date, compared to just over **25% checking social media more frequently**. Increased news checking is fairly consistent across generations, while checking social media more frequently drops dramatically among baby boomers.

Even among those who say they're not concerned at all, around 1 in 4 are washing their hands more frequently, and over 1 in 10 are reading the news more often to keep up-to-date. Those with limited understanding of the virus are more likely to be looking to social media to keep up with the latest developments on the virus compared to the average (35% are).

|                                                                           | All | U.S. | UK | Gen Z | Gen Y | Gen X | Boomers | Lower Inc | Higher Inc |
|---------------------------------------------------------------------------|-----|------|----|-------|-------|-------|---------|-----------|------------|
| Washing my hands more frequently                                          | 58  | 58   | 57 | 60    | 49    | 64    | 59      | 58        | 63         |
| Read the news more often to keep up-to-date                               | 40  | 39   | 40 | 40    | 37    | 44    | 32      | 34        | 46         |
| Trying not to touch my face                                               | 36  | 37   | 31 | 42    | 29    | 37    | 41      | 34        | 33         |
| Not directly touching public surfaces (e.g. door knobs, elevator buttons) | 29  | 30   | 24 | 25    | 26    | 35    | 30      | 27        | 34         |
| Avoided / reduced going to busy public places e.g. cinema                 | 29  | 30   | 20 | 22    | 31    | 31    | 24      | 27        | 22         |
| Checked social media more often to keep up-to-date                        | 27  | 29   | 17 | 27    | 30    | 29    | 15      | 27        | 35         |
| Washing my towels more frequently                                         | 21  | 22   | 13 | 25    | 20    | 21    | 13      | 23        | 16         |
| Avoided / reduced eating out at restaurants                               | 20  | 21   | 11 | 15    | 23    | 20    | 19      | 16        | 17         |
| Changed my daily routines to avoid crowds / rush hour                     | 18  | 19   | 11 | 10    | 20    | 21    | 16      | 17        | 15         |
| Avoided / reduced travel to other destinations in my own country          | 18  | 20   | 10 | 12    | 22    | 19    | 13      | 15        | 13         |
| I'm no longer considering booking trips to other countries                | 17  | 17   | 18 | 14    | 18    | 20    | 11      | 17        | 15         |
| I've cancelled trips to other countries that I've already booked          | 14  | 16   | 7  | 5     | 21    | 17    | 2       | 9         | 24         |
| Started wearing a face mask                                               | 11  | 13   | 3  | 15    | 13    | 12    | 0       | 11        | 21         |
| Working from home more often                                              | 10  | 11   | 5  | 5     | 14    | 9     | 9       | 6         | 11         |
| Changed the way I commute to work (e.g. avoided busy trains)              | 7   | 8    | 4  | 5     | 13    | 6     | 2       | 5         | 8          |
| Other                                                                     | 5   | 5    | 2  | 7     | 3     | 4     | 5       | 6         | 3          |
| I've not made any changes as a result of COVID-19 / coronavirus           | 18  | 16   | 25 | 12    | 15    | 20    | 25      | 21        | 9          |

Question: Which of the following changes, if any, have you made as a result of COVID-19 / coronavirus?



## Behavioral changes: online buying decisions

**A quarter say they're now shopping more online in light of the virus.** Millennials (39%) are much more likely than any other generation to say this, followed by Gen Xers (29%). Higher income individuals are also significantly more likely than lower earners to say this (48% vs. 15%, respectively)

Those in the U.S. are more likely than their UK counterparts to be turning more to online shopping in light of the virus.

Even many of those who say they're worried about the impact of the virus on their personal finances say they're shopping more online in the wake of the spread of the virus (46% do).

|                   | All | U.S. | UK | Gen Z | Gen Y | Gen X | Boomers | Lower Inc | Higher Inc |
|-------------------|-----|------|----|-------|-------|-------|---------|-----------|------------|
| Strongly disagree | 27  | 24   | 47 | 24    | 20    | 29    | 47      | 29        | 19         |
| Somewhat disagree | 13  | 13   | 15 | 13    | 11    | 15    | 12      | 14        | 13         |
| Neutral           | 34  | 36   | 25 | 49    | 30    | 31    | 32      | 42        | 20         |
| Somewhat agree    | 16  | 17   | 7  | 10    | 26    | 12    | 6       | 12        | 20         |
| Strongly agree    | 10  | 11   | 5  | 4     | 13    | 12    | 4       | 3         | 29         |
| Any agree         | 25  | 28   | 12 | 14    | 39    | 24    | 10      | 15        | 48         |
| Any disagree      | 41  | 36   | 62 | 37    | 31    | 44    | 59      | 43        | 32         |

Question: "I'm shopping more often online (including grocery shopping and other goods) now than before, because of COVID-19 / coronavirus"

## Attitudes towards preventative measures

When we asked consumers what steps they felt were necessary to manage the spread of the virus, **over half said that airlines should be reducing and cancelling flights to high-risk destinations**. This is particularly pronounced among older age groups who are less likely to travel frequently compared to younger ones.

However, the generation splits here are once again profound, with **boomers often having a 20-point lead over their Gen Z counterparts**. The only reversal of this comes for closing all schools where, with a vested interest, Gen Z shoots into the lead.

Despite the fact that older age groups tend to be less likely in the UK and U.S. to say that they tend to work remotely, boomers are in fact the most likely to say that remote working is an effective measure to prevent further spread.

Those with **limited understanding of the virus are significantly more likely to believe in the effectiveness of drastic measures such as moving troops to support emergency services**, restricting transport and enacting powers to make people stay in quarantine. Those in the UK are more in favor of working remotely to contain the spread compared to the U.S. Those in the U.S. are slightly more in favor of closing international borders (36% vs. 31%, respectively).

|                                                                                        | All | U.S. | UK | Gen Z | Gen Y | Gen X | Boomers | Lower Inc | Higher Inc |
|----------------------------------------------------------------------------------------|-----|------|----|-------|-------|-------|---------|-----------|------------|
| Airlines reducing / cancelling flights to high-risk destinations                       | 53  | 53   | 54 | 46    | 48    | 57    | 65      | 56        | 44         |
| Companies ensuring employees stay home if they feel unwell                             | 52  | 51   | 60 | 42    | 48    | 56    | 65      | 49        | 52         |
| Increasing hospital supplies                                                           | 48  | 48   | 51 | 42    | 46    | 54    | 46      | 49        | 45         |
| Quarantining areas of the population who are at high risk of spreading the virus       | 46  | 46   | 49 | 37    | 46    | 51    | 46      | 44        | 46         |
| Cancelling public gatherings (e.g. live concerts, sports events, religious gatherings) | 45  | 45   | 45 | 31    | 42    | 52    | 52      | 42        | 51         |
| Closing big tourist attractions                                                        | 37  | 38   | 35 | 37    | 37    | 39    | 34      | 40        | 28         |
| Closing international borders                                                          | 35  | 36   | 31 | 38    | 32    | 35    | 41      | 37        | 34         |
| Companies making work from home mandatory where possible                               | 32  | 31   | 36 | 28    | 34    | 31    | 39      | 31        | 26         |
| Restricting the use of public transport                                                | 25  | 25   | 23 | 28    | 26    | 22    | 24      | 27        | 18         |
| Relying more heavily on digital communication e.g. messaging apps, social media        | 23  | 23   | 26 | 22    | 24    | 22    | 25      | 22        | 21         |
| Troops supporting the emergency services                                               | 22  | 22   | 26 | 17    | 25    | 25    | 18      | 25        | 17         |
| Closing all schools                                                                    | 22  | 22   | 22 | 33    | 21    | 18    | 23      | 23        | 20         |
| New legal powers to make people stay in quarantine                                     | 22  | 21   | 29 | 16    | 24    | 24    | 21      | 24        | 14         |
| Re-employing recently retired medical staff                                            | 15  | 13   | 23 | 15    | 16    | 14    | 15      | 14        | 11         |
| Other                                                                                  | 8   | 8    | 4  | 8     | 7     | 8     | 7       | 11        | 3          |
| None of the above                                                                      | 6   | 6    | 8  | 4     | 4     | 8     | 10      | 7         | 6          |

Question: Which of the following, if any, do you think is a necessary step to manage the spread of the virus?

## Attitudes towards responsibility for managing spread

Above all, consumers in both countries **hold the government and individuals to account for managing the spread of the virus**. Interestingly, those in the U.S. choose the government above all, whereas in the UK consumers put the onus on individuals above all else.

Researchers and scientists are also feeling the pressure - around half of UK/U.S. consumers believe they should take the responsibility for this. Considering that almost half say that the lack of vaccines and over a third say the lack of research / unknowns surrounding the virus are major concerns, this is to be expected.

**Employers should also be very vocal in this space**; more than 40% of consumers in both countries believe that employers have a responsibility in this respect. This is most pronounced among older age groups and higher income earners.

Consumers are as likely to believe employers are responsible as they to believe corporations are responsible.

|                              | All | U.S. | UK | Gen Z | Gen Y | Gen X | Boomers | Lower Inc | Higher Inc |
|------------------------------|-----|------|----|-------|-------|-------|---------|-----------|------------|
| The government               | 68  | 68   | 70 | 71    | 68    | 70    | 60      | 70        | 71         |
| The individual               | 66  | 64   | 76 | 46    | 67    | 74    | 69      | 62        | 69         |
| Researchers / scientists     | 53  | 55   | 46 | 58    | 51    | 56    | 48      | 63        | 53         |
| Employers / workplace        | 42  | 41   | 51 | 30    | 40    | 50    | 44      | 39        | 56         |
| Corporations (e.g. airlines) | 42  | 41   | 47 | 40    | 41    | 43    | 40      | 45        | 42         |
| Other                        | 13  | 14   | 11 | 17    | 13    | 11    | 15      | 19        | 8          |
| None of the above            | 4   | 4    | 5  | 5     | 2     | 5     | 5       | 5         | 3          |

Question: Who do you believe is responsible for managing the spread of the virus?

## Workplace policy

Among those who believe employers are responsible for managing the spread, around a third say that relying more heavily on digital communication such as messaging apps / social media is an effective preventative measure (making them 43% more likely than average to say this). They're also much more likely to say that companies making work from home mandatory where possible is an effective measure (almost half do).

**Changes to work routines are most pronounced among males and millennials.** Currently, millennials are the most likely to report altering the way they commute, as well as increased levels of remote working.

In terms of changes enacted by companies, employees report the most common measures being the **provision of sanitization products, as well as more regular communications and more frequent office cleaning.**

Only 10% currently say that work-from-home is being encouraged. Some **16% they've seen no changes at all, with business carrying on as usual.** As government-implemented restrictions increase over the coming days, we would expect these last two measures to change the most dramatically.

Lower income earners are more likely than higher earners (17% vs. 11%) to say that their employer has not done anything in this respect. In fact, the biggest disparities between higher and lower earners are for the ability to work from home, committing to paying employees in the event of self-isolation, enacting official plans to make sure employees are safe, and offering sanitization products.

|                                                                                                     | All | U.S. | UK | Gen Z | Gen Y | Gen X | Boomers | Lower Inc | Higher Inc |
|-----------------------------------------------------------------------------------------------------|-----|------|----|-------|-------|-------|---------|-----------|------------|
| They're offering sanitization products e.g. hand sanitizers, wipes                                  | 26  | 26   | 24 | 19    | 29    | 32    | 9       | 18        | 44         |
| They're providing regular communications about the virus                                            | 23  | 24   | 19 | 16    | 31    | 25    | 9       | 15        | 35         |
| They're cleaning the offices more regularly                                                         | 20  | 21   | 12 | 17    | 28    | 20    | 3       | 14        | 24         |
| They're frequently communicating possible measures which might be taken in the short term           | 17  | 17   | 15 | 12    | 23    | 17    | 6       | 10        | 23         |
| They've cancelled / cut down on work-related travel                                                 | 16  | 18   | 7  | 12    | 21    | 20    | 3       | 11        | 24         |
| They've created an official plan to help employees stay safe                                        | 13  | 13   | 11 | 6     | 20    | 12    | 6       | 7         | 19         |
| They're encouraging employees to work from home                                                     | 10  | 11   | 7  | 8     | 18    | 7     | 4       | 5         | 13         |
| They're committed to paying employees if they have to self-isolate rather than just the minimum pay | 7   | 7    | 7  | 5     | 13    | 5     | 0       | 3         | 10         |
| They've made working from home mandatory for everyone                                               | 6   | 7    | 2  | 5     | 11    | 4     | 3       | 3         | 9          |
| Other                                                                                               | 2   | 2    | 3  | 3     | 1     | 3     | 2       | 2         | 2          |
| They've not done anything, it's business as usual                                                   | 16  | 15   | 21 | 12    | 18    | 14    | 20      | 17        | 11         |
| I don't work for a company / I'm not in an office so I can't say                                    | 37  | 37   | 37 | 48    | 22    | 38    | 60      | 53        | 14         |

Question: How is your workplace managing COVID-19 / coronavirus?

## Economic confidence

**Over half of consumers in the U.S. and UK think a global recession is now likely.** A further 1 in 3 are unsure, leaving fewer than 1 in 10 who think a recession is unlikely. This sentiment is shared equally in both the UK and U.S.

Once again, audience-differences are dramatic here. From an age perspective, Gen Zs are more likely to be in the “uncertain” group. **High-income groups are twice as likely as lower income ones to think a recession is extremely likely**, and men are ahead of women.

The impact that this could have on spending decisions is clear, and we’ll be examining this in more detail in further upcoming research.

Those who say they are concerned about the impact of the virus on their personal finances are 61% more likely than average to believe a global recession is extremely likely in light of the virus (26% do). Overall, 67% of this group believe a global recession is now likely.

|                    | All | U.S. | UK | Gen Z | Gen Y | Gen X | Boomers | Lower Inc | Higher Inc |
|--------------------|-----|------|----|-------|-------|-------|---------|-----------|------------|
| Extremely unlikely | 3   | 3    | 3  | 2     | 2     | 4     | 3       | 3         | 2          |
| Unlikely           | 7   | 7    | 9  | 8     | 6     | 9     | 7       | 8         | 8          |
| Likely             | 37  | 37   | 38 | 38    | 45    | 33    | 30      | 31        | 49         |
| Extremely likely   | 16  | 16   | 14 | 7     | 19    | 17    | 18      | 12        | 24         |
| I’m not sure       | 36  | 37   | 36 | 45    | 28    | 38    | 42      | 46        | 18         |

Question: How likely do you think a global recession is, as a result of COVID-19 / coronavirus?

## Digital health appointments

Digital / virtual health appointments have been suggested as one way to deliver health assistance while minimizing the spread of the virus. **There's considerable consumer support for this, with 6 in 10 U.S. and UK consumers believing both that they are effective, and that they would consider using them.**

Belief that digital health appointments are effective remains consistent across geography, age and income, but peaks among higher income groups.

However, while only **about 15% of people say they're definitely not open to them, this rises to over 25% among boomers**. Older consumers will therefore need the most convincing and reassurance over their efficacy.

|                         | All | U.S. | UK | Gen Z | Gen Y | Gen X | Boomers | Lower Inc | Higher Inc |
|-------------------------|-----|------|----|-------|-------|-------|---------|-----------|------------|
| Very ineffective        | 4   | 4    | 4  | 4     | 2     | 5     | 5       | 4         | 2          |
| Somewhat ineffective    | 10  | 10   | 10 | 15    | 7     | 10    | 12      | 10        | 9          |
| Somewhat effective      | 39  | 38   | 45 | 29    | 48    | 38    | 36      | 37        | 43         |
| Very effective          | 21  | 22   | 16 | 29    | 20    | 19    | 17      | 20        | 30         |
| I'm not sure how I feel | 26  | 26   | 25 | 23    | 23    | 29    | 30      | 29        | 16         |
| Any Effective           | 60  | 60   | 60 | 58    | 67    | 57    | 53      | 57        | 73         |
| Any Not effective       | 14  | 14   | 15 | 19    | 10    | 14    | 16      | 14        | 11         |

Question: How effective do you think digital health appointments would be in helping to manage the spread of the virus?

|                                                                            | All | U.S. | UK | Gen Z | Gen Y | Gen X | Boomers | Lower Inc | Higher Inc |
|----------------------------------------------------------------------------|-----|------|----|-------|-------|-------|---------|-----------|------------|
| I already use a digital health service that allows me to speak to a doctor | 12  | 14   | 5  | 15    | 19    | 9     | 3       | 8         | 20         |
| I would definitely consider using it if it was available                   | 48  | 46   | 58 | 46    | 51    | 48    | 41      | 48        | 47         |
| I'm not sure                                                               | 22  | 22   | 21 | 21    | 17    | 25    | 29      | 24        | 16         |
| I wouldn't use it, I still prefer personal face-to-face appointments       | 15  | 15   | 13 | 16    | 11    | 14    | 25      | 16        | 15         |
| I wouldn't use it, I don't trust the usefulness of telehealth services     | 3   | 3    | 4  | 2     | 2     | 5     | 3       | 3         | 2          |

Question: To what extent would you consider using a digital health service instead of visiting your doctor in person?

## Benefits of digital health appointments

Among those who currently use/would consider using digital health appointments, the majority believe the biggest benefits are the **reduced risk of passing on and catching infections, and reducing the risk of infecting medical staff**.

Those in the UK are much more likely to say that reducing the burden on medical professionals is an important benefit of digital health appointments. This is also a sentiment which is most evident among millennials.

|                                                                                     | All | U.S. | UK  | Gen Z | Gen Y | Gen X | Boomers | Lower Inc | Higher Inc |
|-------------------------------------------------------------------------------------|-----|------|-----|-------|-------|-------|---------|-----------|------------|
| Reduces risk of catching infections                                                 | 42  | 41   | 49  | 38    | 42    | 45    | 38      | 39        | 46         |
| Reduces risk of passing on infections to other patients                             | 43  | 41   | 50  | 38    | 44    | 46    | 37      | 39        | 48         |
| Reduces risk of passing on infections to healthcare staff                           | 42  | 40   | 48  | 36    | 42    | 45    | 39      | 37        | 51         |
| It reduces the burden on medical professionals / hospitals                          | 27  | 25   | 38  | 24    | 31    | 27    | 24      | 25        | 24         |
| It helps me get an appointment more quickly / saves me waiting                      | 30  | 30   | 33  | 30    | 37    | 28    | 21      | 26        | 32         |
| If people are unwell, it helps them to still be able to see a doctor                | 34  | 33   | 45  | 28    | 35    | 36    | 37      | 33        | 31         |
| It reduces healthcare costs                                                         | 26  | 25   | 29  | 22    | 31    | 26    | 17      | 24        | 25         |
| It's more accessible to speak with a doctor if people live in more remote locations | 32  | 31   | 40  | 29    | 35    | 32    | 28      | 29        | 31         |
| It speeds up diagnosis                                                              | 20  | 19   | 24  | 19    | 24    | 19    | 10      | 20        | 20         |
| It offers reassurance for people who might need to self-isolate                     | 31  | 29   | 42  | 27    | 36    | 30    | 29      | 29        | 27         |
| Other                                                                               | 3   | 4    | 1   | 3     | 5     | 2     | 1       | 5         | 2          |
| None of the above                                                                   | 0.2 | 0.2  | 0.2 | 0.1   | 0.2   | 0.2   | 0.5     | 0.1       | 0.0        |

Question: Which of the following do you think are the biggest benefits of a digital health service given the current situation?



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