



DATA SNAPSHOT

Global Study: COVID Recovery and Vaccines

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EXECUTIVE SUMMARY

This Data Snapshot examines consumers' behaviors, attitudes, and expectations around COVID. This research is based on a study of 17,509 consumers from 18 countries: Australia, Brazil, Canada, France, Germany, Hong Kong, India, Indonesia, Japan, Malaysia, Mexico, the Philippines, Singapore, Spain, South Korea, Thailand, the United Kingdom, and the United States (see methodology at end of report). Highlights from this study include:

- + **Online activities grew in popularity in all countries...** 77% of all respondents reported starting at least one of 11 online activities since the onset of the COVID-19 pandemic.
- + **...But the growth may not be sustained.** Depending on the online activity and the country, some consumers expect to curtail their online behaviors after the pandemic is over. Indian consumers expect to continue with their current online behaviors at the highest rates, while Japanese consumers expect to continue at the lowest rates.
- + **Many consumers remain vaccine hesitant.** More than one-third of consumers said they were not yet planning to get the vaccine when it becomes available to them, with potential side effects and safety concerns cited most frequently as the given reasons.
- + **Consumers are not satisfied with their governments' approach the vaccine.** Fewer than half of consumers said they felt satisfied with their government's communications around vaccine effectiveness, their communications around the vaccination process, or the process for scheduling vaccinations. Consumers in France, Germany, and Japan were least satisfied with their government's approach to vaccination.

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1. New Participation in Online Activities – Overall
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Methodology

New Participation in Online Activities – Overall

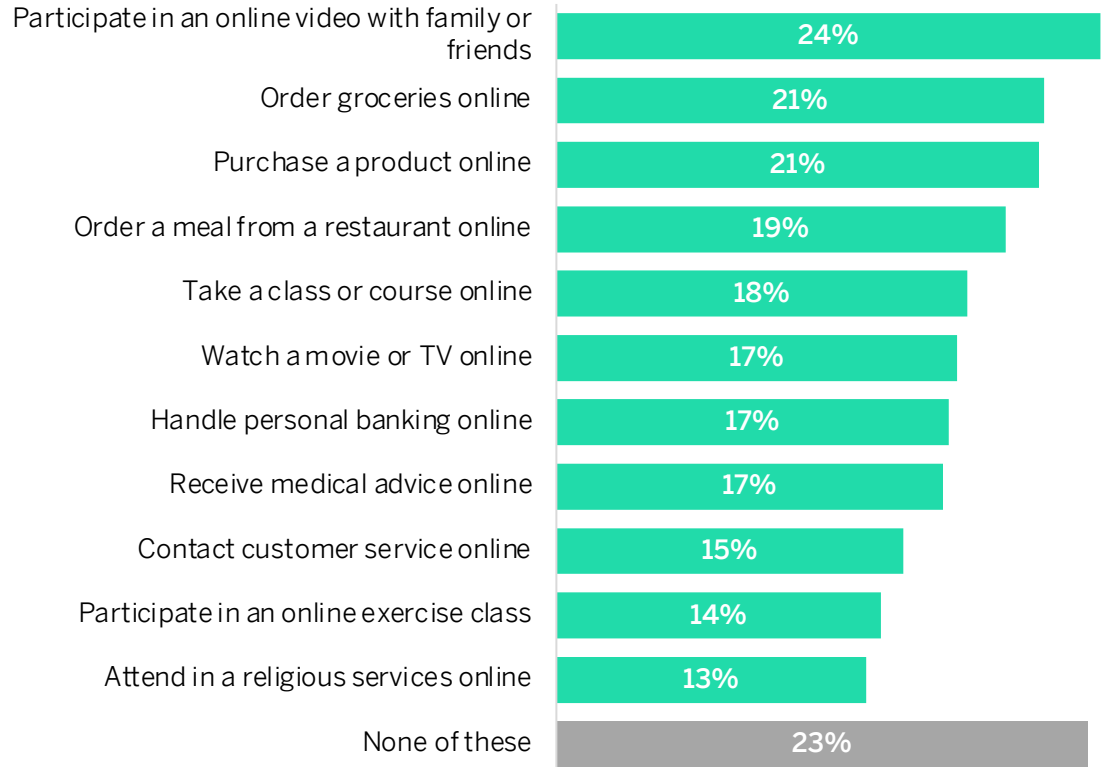
KEY TAKEAWAYS

- + More than three-quarters of consumers reported starting at least one new online activity during COVID, with only 23% saying they didn't begin any of the listed activities.
- + The most common new online activities started during COVID were videos with friends and family, ordering groceries, and purchasing products.
- + Consumers were least likely to begin participating in large community events, such as joining an online exercise class or attending online religious services during the pandemic.

ABOUT

This chart shows the percentage of respondents from all surveyed countries who reported starting each of the listed online activities for the first time since the COVID-19 pandemic began.

Since the beginning of the coronavirus (COVID-19) pandemic, which of the following activities have you done for the first time?
 (Select all that apply)



New Participation in Online Activities by Country (Part 1)

KEY TAKEAWAYS

- + Japan saw the lowest level of consumer adoption for five of these online activities, with fewer than 10% of respondents starting any of them during COVID.
- + Consumers in India adopted three of these online activities during COVID at higher levels than consumers in any other country.
- + Of all the countries we looked at, consumers in the Philippines were most likely to begin purchasing both products and groceries online during COVID.
- + Purchasing a product online had the largest difference in adoption rates across countries, with a 31 percentage-point gap between the Philippines and the UK.

ABOUT

This chart shows the percentage of respondents from 18 countries who reported starting the listed online activities for the first time during the COVID-19 pandemic. It highlights the countries with the highest and lowest adoption rates for each activity.

Since the beginning of the coronavirus (COVID-19) pandemic, which of the following activities have you done for the first time?

	Purchase a product online	Order a meal from a restaurant online	Order groceries online	Contact customer service online	Handle personal banking online	Receive medical advice online
Australia	12%	11%	12%	10%	9%	18%
Brazil	25%	22%	23%	20%	27%	16%
Canada	11%	14%	17%	8%	10%	18%
France	16%	14%	13%	8%	11%	14%
Germany	11%	11%	10%	10%	8%	7%
Hong Kong	19%	20%	21%	18%	15%	15%
India	32%	23%	30%	30%	30%	30%
Indonesia	32%	28%	27%	22%	23%	26%
Japan	10%	8%	9%	5%	6%	4%
Malaysia	32%	29%	28%	20%	24%	19%
Mexico	28%	28%	28%	22%	24%	17%
Philippines	39%	29%	34%	22%	22%	17%
Singapore	16%	18%	20%	11%	14%	12%
South Korea	20%	22%	23%	11%	16%	8%
Spain	15%	13%	17%	13%	14%	23%
Thailand	35%	32%	32%	21%	28%	18%
UK	8%	12%	15%	10%	9%	16%
U.S.	16%	18%	22%	12%	14%	23%

New Participation in Online Activities by Country (Part 2)

KEY TAKEAWAYS

- + Japanese consumers not only adopted four of the five online activities at the lowest rates of any country, they were also the most likely to say they didn't start any new online activities during COVID.
- + Consumers in India adopted three of these online activities during COVID at the highest levels across countries.
- + Only 7% of consumers in the UK began watching movies or TV online during COVID, the lowest of any country.
- + Ninety-seven percent of consumers in India reported adopting at least one of the online activities we listed during COVID, compared with only 44% of Japanese consumers.

Since the beginning of the coronavirus (COVID-19) pandemic, which of the following activities have you done for the first time?

Legend: ■ Lowest Country ■ Highest Country

	Participate in an online exercise class	Watch a movie or TV online	Take a class or course online	Attend in a religious services online	Participate in an online video with family or friends	None of these
Australia	10%	12%	10%	8%	17%	39%
Brazil	24%	21%	27%	24%	29%	11%
Canada	9%	11%	11%	10%	20%	32%
France	9%	10%	10%	4%	20%	32%
Germany	7%	9%	8%	6%	16%	45%
Hong Kong	17%	18%	22%	18%	18%	19%
India	27%	29%	31%	26%	32%	3%
Indonesia	16%	24%	23%	18%	31%	10%
Japan	4%	11%	5%	2%	12%	56%
Malaysia	20%	24%	26%	20%	30%	8%
Mexico	19%	23%	30%	15%	36%	8%
Philippines	17%	30%	23%	26%	34%	5%
Singapore	15%	13%	21%	17%	21%	24%
South Korea	12%	19%	21%	13%	20%	19%
Spain	14%	15%	17%	4%	25%	26%
Thailand	12%	24%	15%	9%	23%	14%
UK	10%	7%	11%	7%	19%	36%
U.S.	13%	14%	13%	16%	19%	26%

ABOUT

This chart shows the percentage of respondents from each surveyed country who reported starting the listed online activities for the first time during the COVID-19 pandemic. It highlights the countries with the highest and lowest adoption rates for each activity.

Participation in Online Activities Post-Pandemic – Overall

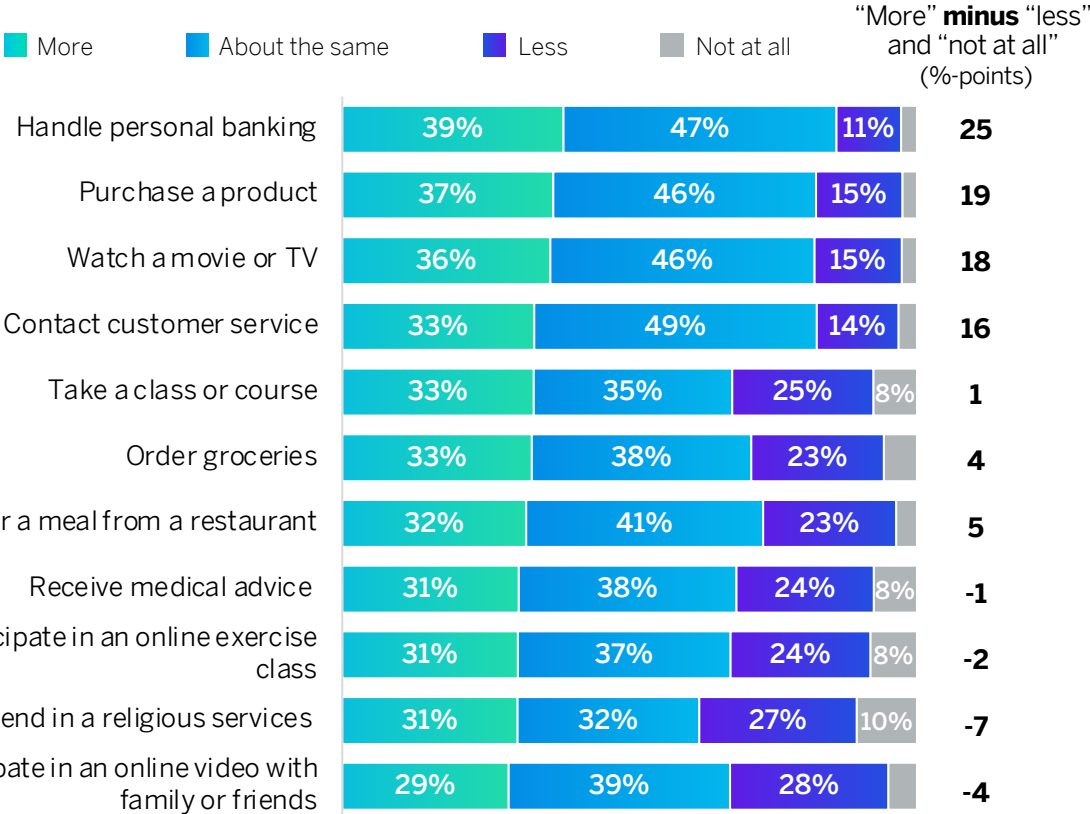
KEY TAKEAWAYS

- + We created a forecast of post-COVID momentum for each activity by subtracting the percentage of consumers who said they expect to do it “less” or “not at all” after COVID from the percentage who said they expect to do it “more.”
- + Personal online banking has the most post-COVID momentum of any activity we looked at, followed by purchasing a product and watching a movie or TV online.
- + Of the online activities we looked at, the two with the most negative outlook for growth after the pandemic are attending religious services and participating in videos with family and friends.

ABOUT

This chart shows the how respondents across all surveyed countries expect their usage of the listed online activities to change after the COVID-19 pandemic is over.

Compared to your current levels, how much do you expect to do these activities after the COVID pandemic goes away?



Participation in Online Activities Post-Pandemic by Country (Part 1)

KEY TAKEAWAYS

- + The online activity with the largest difference in growth outlook across countries is “receiving medical advice online,” with an 84 percentage-point gap in momentum between India and Spain.
- + The largest gap for expected continuation of online activities within a single country is in Spain, where consumers expect to shop online a bit more but receive medical advice online significantly less after COVID.
- + India has the highest post-pandemic growth outlook for five of the six online activities. Thailand, however, has the most positive momentum around purchasing products online.

ABOUT

This chart shows the post-COVID momentum for each of the listed online activities across 18 countries. Momentum is calculated by subtracting the percentage of consumers who expect to do an activity “less” or “not at all” after COVID from the percentage who expect to do it “more.” The chart highlights the countries with the highest and lowest momentum rates for each activity.

Percentage who expect to do these activities **more** after the COVID pandemic goes away minus percentage who expect to do **less** or **not at all** (%-points)

	Purchase a product online	Order a meal from a restaurant online	Order groceries online	Contact customer service online	Handle personal banking online	Receive medical advice online
Australia	+11	-6	-25	+7	+14	-30
Brazil	+20	+0	+0	+6	+22	-12
Canada	+10	-12	-27	-2	+6	-24
France	+12	-7	+2	-6	+16	-7
Germany	-6	-18	-17	-7	-2	-17
Hong Kong	+30	+28	+27	+42	+46	+25
India	+42	+36	+44	+45	+53	+45
Indonesia	+27	+21	+14	+32	+37	+9
Japan	+5	+13	-2	+12	-2	-6
Malaysia	+23	+9	+23	+25	+26	+18
Mexico	+10	-7	-13	+6	+21	-14
Philippines	-2	-17	-22	-8	+14	-24
Singapore	+20	+4	+14	+27	+41	+10
South Korea	+13	+2	+10	+5	+17	+8
Spain	+8	-16	-11	-14	-5	-39
Thailand	+43	+30	+36	+38	+35	+43
UK	+12	-21	-27	-7	+12	-22
U.S.	+24	+15	-6	+24	+18	+3

Participation in Online Activities Post-Pandemic by Country (Part 2)

KEY TAKEAWAYS

- + Consumers in India are the most likely to increase their participation in all five of these online activities after the pandemic.
- + Germany has the lowest post-COVID growth outlook for three of these five activities.
- + Watching a movie or TV online in India has the most positive post-COVID momentum for these activities, while attending religious services in Germany has the most negative.

Percentage who expect to do these activities **more** after the COVID pandemic goes away minus percentage who expect to do **less** (%-points)

■ Lowest Country
 ■ Highest Country

	Participate in an online exercise class	Watch a movie or TV online	Take a class or course online	Attend in a religious services online	Participate in an online video with family or friends
Australia	+2	+3	-3	-11	-23
Brazil	-16	+17	+11	-23	-12
Canada	-17	+4	-16	-36	-27
France	-8	+12	-13	-33	+2
Germany	-36	+9	-20	-40	-7
Hong Kong	+10	+34	+6	+14	+34
India	+38	+47	+39	+38	+36
Indonesia	+18	+21	+10	+3	+14
Japan	-27	-2	-2	-24	-30
Malaysia	+11	+27	+6	+18	+11
Mexico	-10	+12	-15	-28	-19
Philippines	-27	-2	-19	-28	-11
Singapore	-4	+37	+8	-1	-4
South Korea	-19	+6	-18	-31	-10
Spain	-29	+1	-18	-21	-39
Thailand	+25	+34	+28	+21	+27
UK	-23	+23	-18	-36	-25
U.S.	+10	+24	+4	-8	+4

ABOUT

This chart shows the post-COVID momentum for each of the listed online activities across 18 countries. Momentum is calculated by subtracting the percentage of consumers who expect to do an activity “less” or “not at all” after COVID from the percentage who expect to do it “more.” The chart highlights the countries with the highest and lowest momentum rates for each activity.

Expectations for Returning to Normal by Country

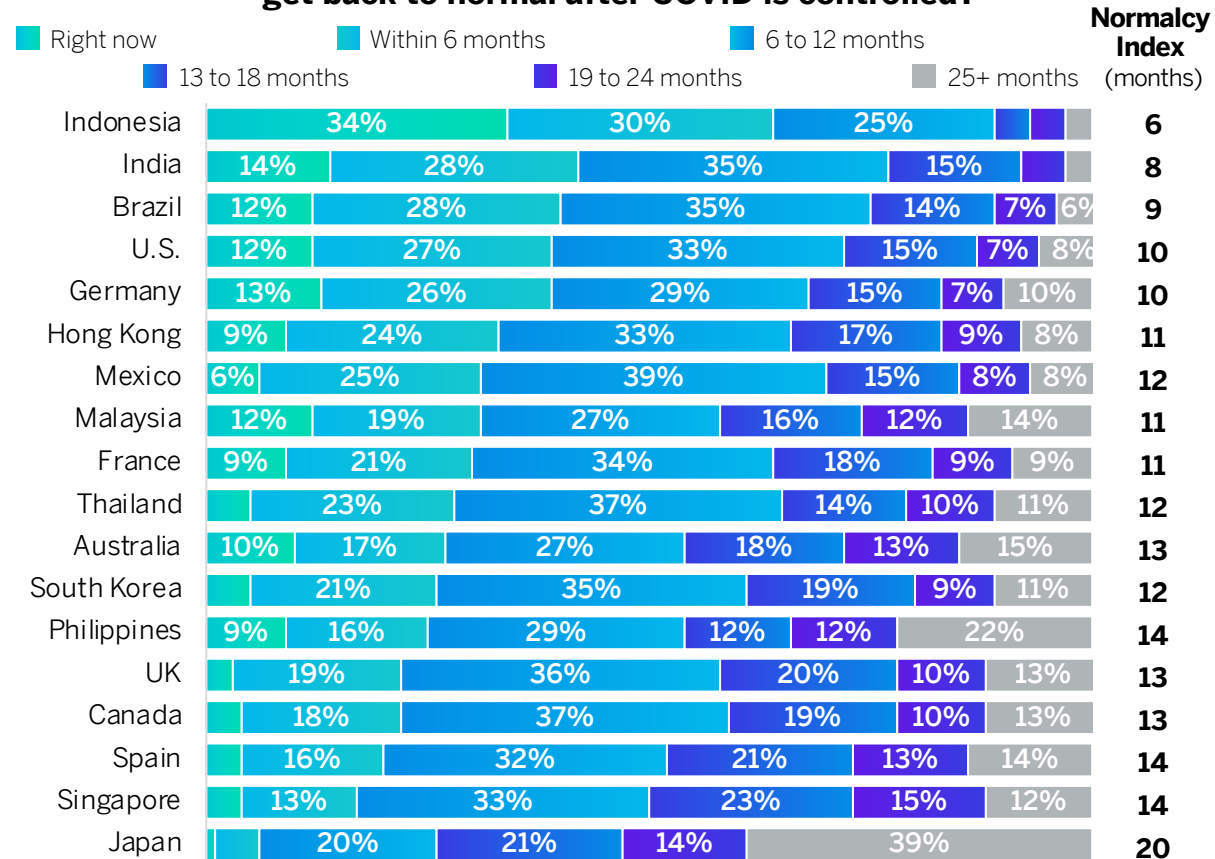
KEY TAKEAWAYS

- + We calculated a "Normalcy Index" for each country based on the average number of months consumers in that country think it will take for life to get back to normal (from the time they completed the survey).
- + Consumers in Indonesia have the most positive outlook on when they expect life to return to normal, with a median expectation of six months. India and Brazil also have a Normalcy Index below 10 months.
- + Of all the countries we looked at, consumers in Japan had the most pessimistic outlook about when life would return to normal following the pandemic, with a median expectation of about 20 months.

ABOUT

This chart shows how long after the date of the survey respondents from each country expect life to return to normal once the COVID-19 pandemic is under control. It also includes a "Normalcy Index," which reflects the median expectation for how many months it will take for life to go back to normal.

When do you expect that your life will be able to get back to normal after COVID is controlled?



Plans for COVID Vaccination – Overall

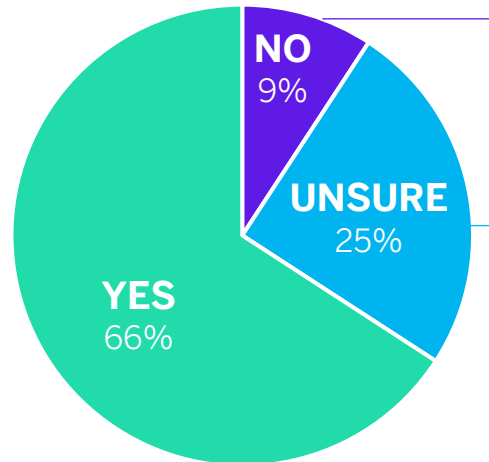
KEY TAKEAWAYS

- + Across all 18 countries, two-thirds of consumers say that they plan on receiving the COVID vaccine when it becomes available to them. One-fourth of consumers indicate that they are unsure whether they will get vaccinated, and 9% say they will not.
- + When we asked the consumers who are unsure or don't plan on receiving the vaccine the reasons for their disinclination, the top two concerns they cited were potential side effects and vaccine safety.
- + Consumers were least likely to cite religious or personal beliefs as the reason for their vaccine hesitancy, with only 7% indicating that was a concern.

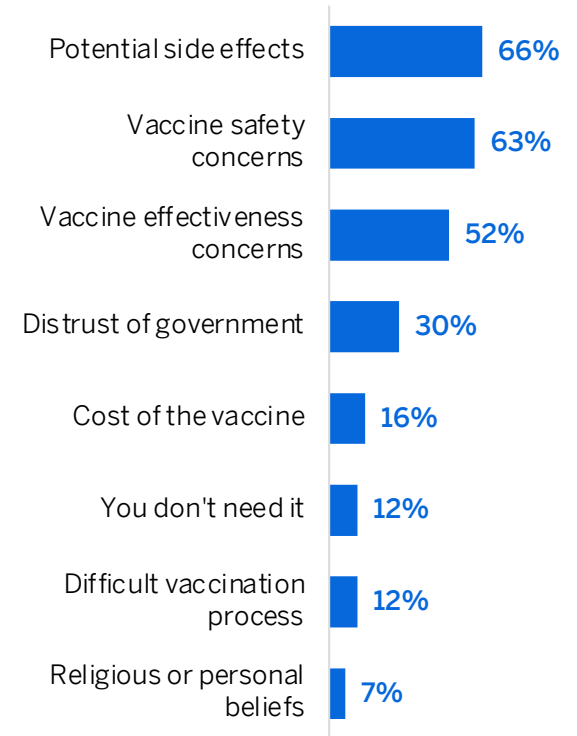
ABOUT

This chart shows the percentage of respondents from all surveyed countries who plan on getting vaccinated when a COVID-19 vaccine becomes available to them. For the respondents who answered "no" or "unsure," the chart also shows the reasons for their hesitancy.

When a vaccine to prevent COVID becomes available to you, do you plan on being vaccinated?



Which of the following are reasons that are keeping you from getting vaccinated? (Select all that apply)



Plans for COVID Vaccination by Country (Part 1)

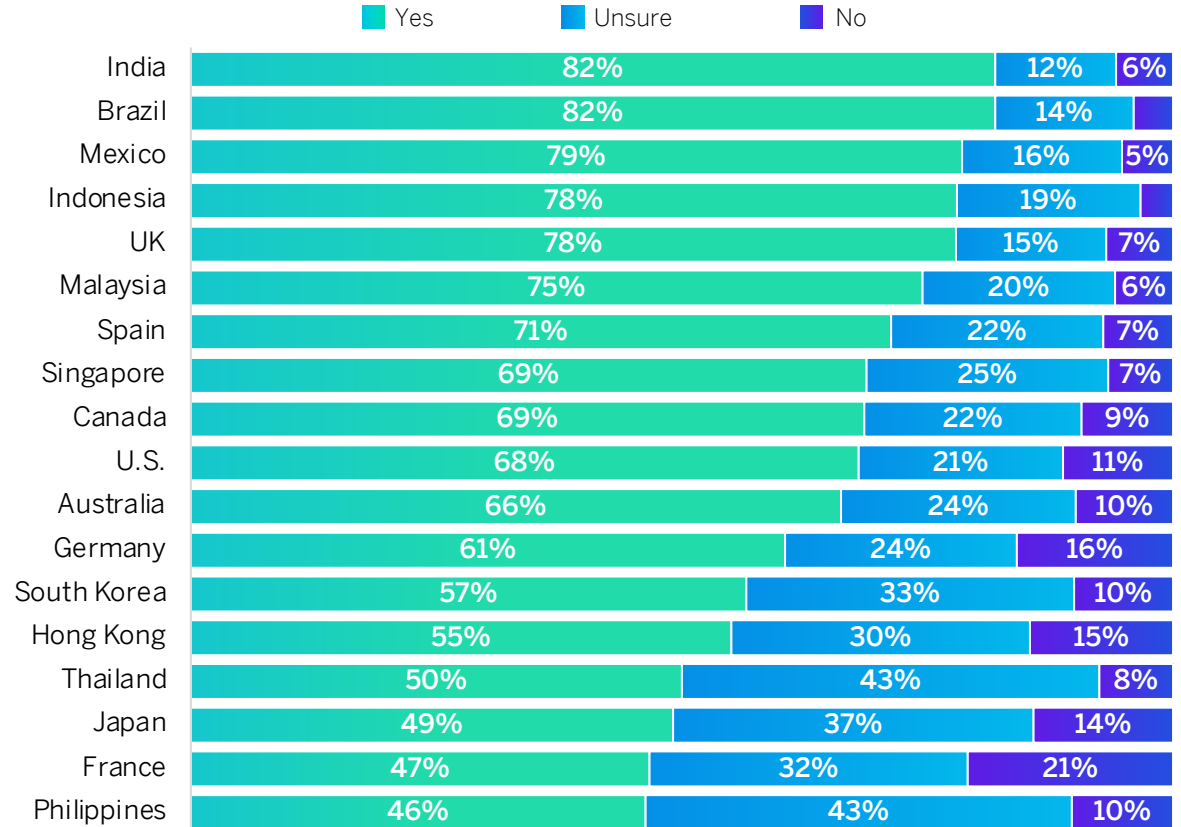
KEY TAKEAWAYS

- + Consumers in India and Brazil were most likely to say they would get vaccinated when it becomes available to them.
- + Consumers in the Philippines, France, and Japan reported being the least likely to get vaccinated, with fewer than half of consumers in those countries saying they plan on receiving the vaccine when it becomes available.
- + Consumers from France were the most likely to say they would *not* take the vaccine, while consumers from Thailand and the Philippines were the most unsure about whether or not they would get it.

ABOUT

This chart shows the vaccination plans for consumers in each of the 18 surveyed countries once the vaccine becomes available to them.

When a vaccine to prevent COVID becomes available to you, do you plan on being vaccinated?



Plans for COVID Vaccination by Country (Part 2)

KEY TAKEAWAYS

- + Of all the consumers who said they were either unsure about or not planning on getting the vaccine, those from the Philippines were most likely to cite potential side effects, vaccine safety concerns, and efficacy concerns as the reason.
- + Consumers from India were most likely to cite the vaccination process, lack of need, and religious/personal beliefs as reasons keeping them from getting the vaccine, but they were least likely to cite concerns around side effects or vaccine safety.
- + Thai consumers are most concerned about the cost of the vaccine, while Mexican consumers most distrust their government.

ABOUT

This chart shows the percentages of consumers from each country who cited each concern as a reason they said they were unsure or not getting the vaccine when it becomes available to them.

Which of the following are reasons that are keeping you from getting vaccinated?

Legend: ■ Lowest Country ■ Highest Country

	Potential side effects	Vaccine safety concerns	Vaccine efficacy concerns	Distrust of gov't	Cost of the vaccine	Difficult vaccination process	You don't need it	Religious or personal beliefs
Australia	61%	61%	45%	21%	10%	7%	14%	7%
Brazil	64%	65%	65%	34%	9%	19%	8%	11%
Canada	69%	63%	49%	29%	8%	7%	16%	8%
France	74%	50%	59%	38%	5%	12%	14%	4%
Germany	71%	64%	50%	35%	10%	11%	14%	6%
Hong Kong	68%	67%	48%	32%	8%	6%	7%	4%
India	44%	42%	38%	23%	28%	24%	26%	22%
Indonesia	72%	64%	59%	29%	28%	17%	15%	16%
Japan	63%	62%	37%	18%	16%	7%	7%	2%
Malaysia	59%	67%	56%	27%	21%	15%	18%	14%
Mexico	69%	64%	61%	46%	11%	16%	4%	3%
Philippines	80%	75%	68%	31%	32%	17%	9%	7%
Singapore	64%	65%	53%	20%	12%	9%	9%	8%
South Korea	55%	70%	44%	30%	8%	8%	4%	3%
Spain	67%	61%	49%	39%	7%	8%	11%	5%
Thailand	75%	64%	62%	35%	35%	21%	17%	4%
UK	44%	50%	38%	29%	10%	10%	16%	5%
U.S.	57%	58%	41%	26%	16%	13%	18%	12%

Communication about COVID Vaccines – Overall

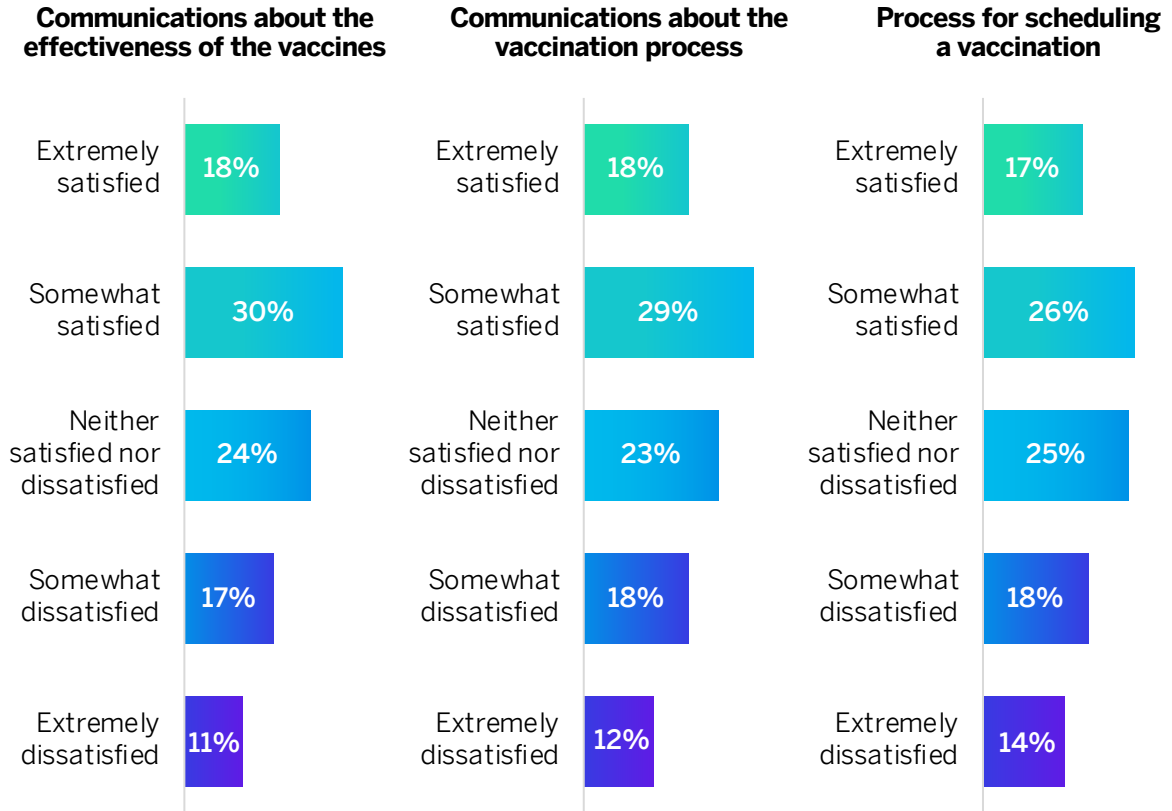
KEY TAKEAWAYS

- + Fewer than half of all respondents said they are satisfied with their government's communications around the effectiveness of the vaccine, communications around the vaccination process, or the actual process of scheduling a vaccine.
- + Consumers are least satisfied with their government's process for scheduling a vaccination. Only 40% indicated they were satisfied with the process, while 32% said they were "somewhat" or "extremely" dissatisfied.
- + Across each of these three areas, about one-fourth of consumers reported feeling "neither satisfied nor dissatisfied" with their government's approach.

ABOUT

This chart shows how satisfied consumers from all 18 surveyed countries said they feel with their government's approach to communications around the effectiveness of the vaccines, communications around the vaccination process, and the process for scheduling a COVID-19 vaccine.

How satisfied are you with your government in these areas...



Communication about COVID Vaccines by Country

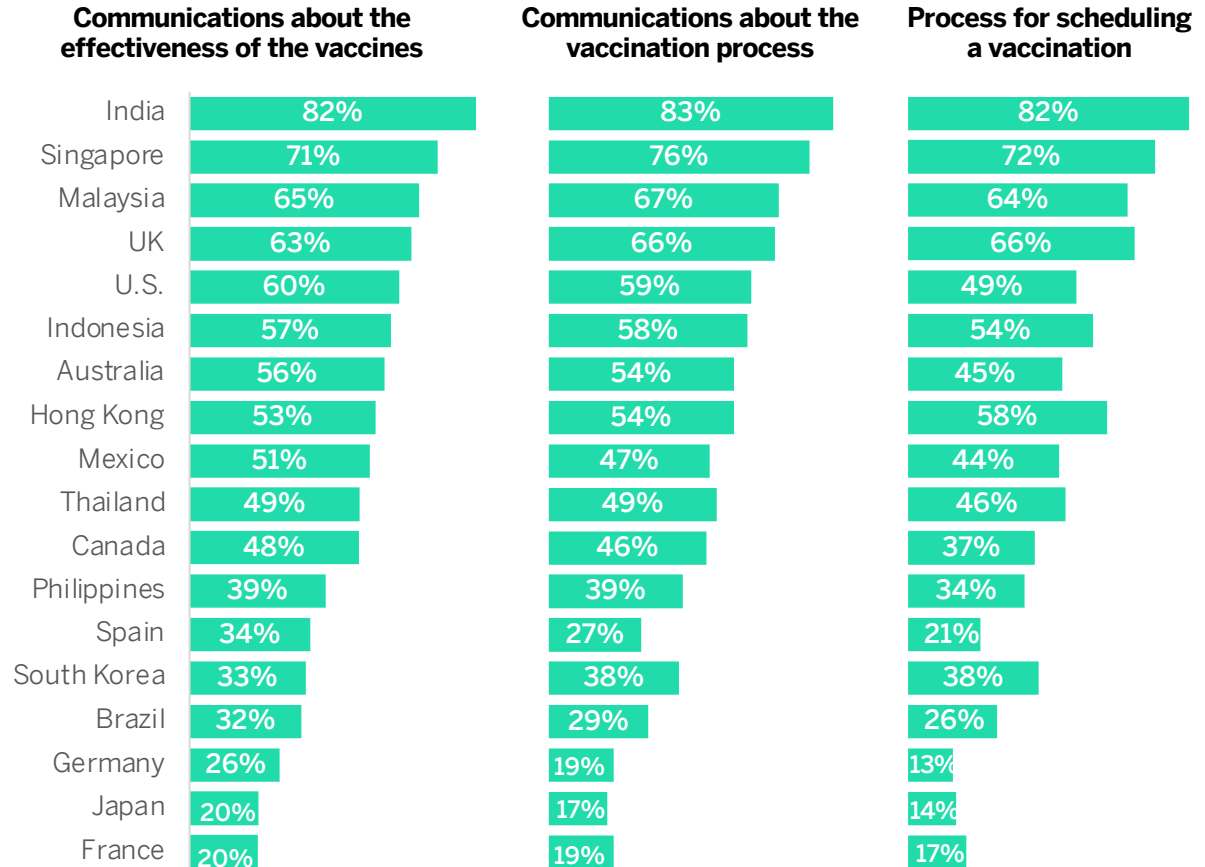
KEY TAKEAWAYS

- + Consumers in India were most likely to report feeling satisfied with their government's approach in each of the three vaccination areas.
- + In each of the areas we examined, consumers in France, Japan, and Germany were least likely to say they were satisfied with their government's approach to vaccination.
- + Only 13% of German consumers indicated that they felt satisfied with the government around the process of scheduling a vaccination, the lowest rate of any country across the three areas.

ABOUT

This chart shows the percentage of consumers from each of the surveyed countries who said they are satisfied with the communications and processes that their respective governments set up around the COVID-19 vaccine.

Residents who are satisfied with their government in these areas...



DATA SOURCE

The data for this report comes from a global consumer study that Qualtrics XM Institute conducted in the first quarter of 2021. Using an online survey, XM Institute collected data from 17,509 consumers across 18 countries: Australia, Brazil, Canada, France, Germany, Hong Kong, India, Indonesia, Japan, Malaysia, Mexico, the Philippines, Singapore, South Korea, Spain, Thailand, the United Kingdom, and the United States.

XM Institute surveyed 1,000 consumers from each of the countries except for Hong Kong (556 respondents) and South Korea (952 respondents). To ensure that the data accurately reflected the population within each country we surveyed, we set quotas for responses to match the gender, age, and income demographics of that country.

DATA CALCULATION

In Figures 4, 5, and 6, to calculate the extent to which each online activity is expected to increase or decrease after COVID, we asked respondents, “Compared to your current levels, how much do you expect to do these activities after the COVID pandemic goes away?” We then subtracted the percentage of respondents who said they expected to perform each activity “less” or “not at all” from the percentage who said they expected to perform each activity “more.”

In Figure 7, to calculate the “Normalcy Index,” we asked respondents, “When do you expect that your life will be able to get back to normal after COVID is controlled?” For each country, we multiplied the percentage of respondents who selected each answer (except “Right now”) by the average number of months in the range they selected. We then added all those numbers together to get the Normalcy Index. For example, to calculate the Normalcy Index for Indonesia, the equation looks like, “(.3 x 3) + (.25 x 9) + (.04 x 15.5) + (.04 x 21.5) + (.03 x 30) = 5.53 months, rounded up to to 6 months. Note: we used 30 months as a proxy for “Longer than 24 months.”

In Figures 8 and 10, we calculated the percentage of consumers who selected each reason keeping them from getting a COVID-19 vaccine by first asking consumers, “When a vaccine to prevent COVID becomes available to you, do you plan on being vaccinated?” Each respondent who answered “no” or “unsure” was then presented with a second question asking them to select the concerns keeping them from getting vaccinated. We then divided the number of respondents who selected each reason by the total number of respondents who said they did not plan to or were unsure of getting a vaccine.

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