



COVID-19 shock & new normal

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“opinionway

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Methodology



Research methodology



Quantitative research conducted among 1369 Poles, respondents aged 18 and older. Representative samples for the population in terms of gender, age, education and region.



Online survey, **CAWI** (Computer Assisted Web Interview) on panel



Surveys carried out from **11/06 to 15/06/2020**, at the same moment the new media communicated about the new Silesian cluster.



A margin of error of 1.5 to 3 percentage points should be considered when reading the results for samples N = 1000 respondents.

The complete or partial publication of the results of this study must contain the following mention:

«OpinionWay Polska Survey in collaboration with 24/7 Communication»

The use of the results of this survey without this title is a violation of copyright.



Respondents' profile



GENEDER	%
Males	49%
Females	51%



AGE	%
18-29 y.o.	18%
30-39 y.o.	20%
40-49 y.o.	17%
50-59 y.o.	15%
60 and more y.o.	29%



EDUCATION	%
primary	8%
vocational	10%
secondary	41%
higher	41%



PLACE OF LIVING	%
village	32%
town up to 20k inhabitants	13%
city 20-50k inhabitants	11%
city 50-100k inhabitants	10%
city 100-200k inhabitants	11%
city 200-500k inhabitants	11%
city 500k+ inhabitants	12%



VOIVODSHIP	%
dolnośląskie	8%
kujawsko-pomorskie	5%
lubelskie	6%
lubuskie	3%
łódzkie	6%
małopolskie	9%
mazowieckie	14%
opolskie	3%
podkarpackie	6%
podlaskie	3%
pomorskie	6%
śląskie	12%
świętokrzyskie	3%
warmińsko-mazurskie	4%
wielkopolskie	9%
zachodniopomorskie	5%

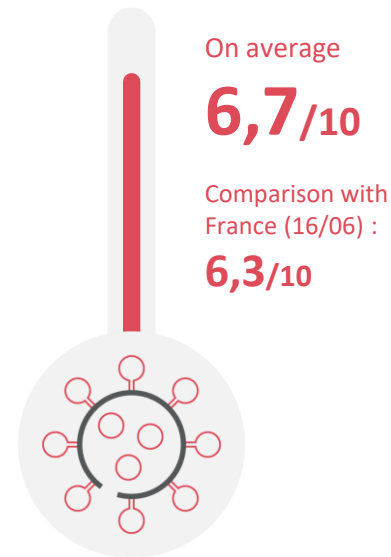
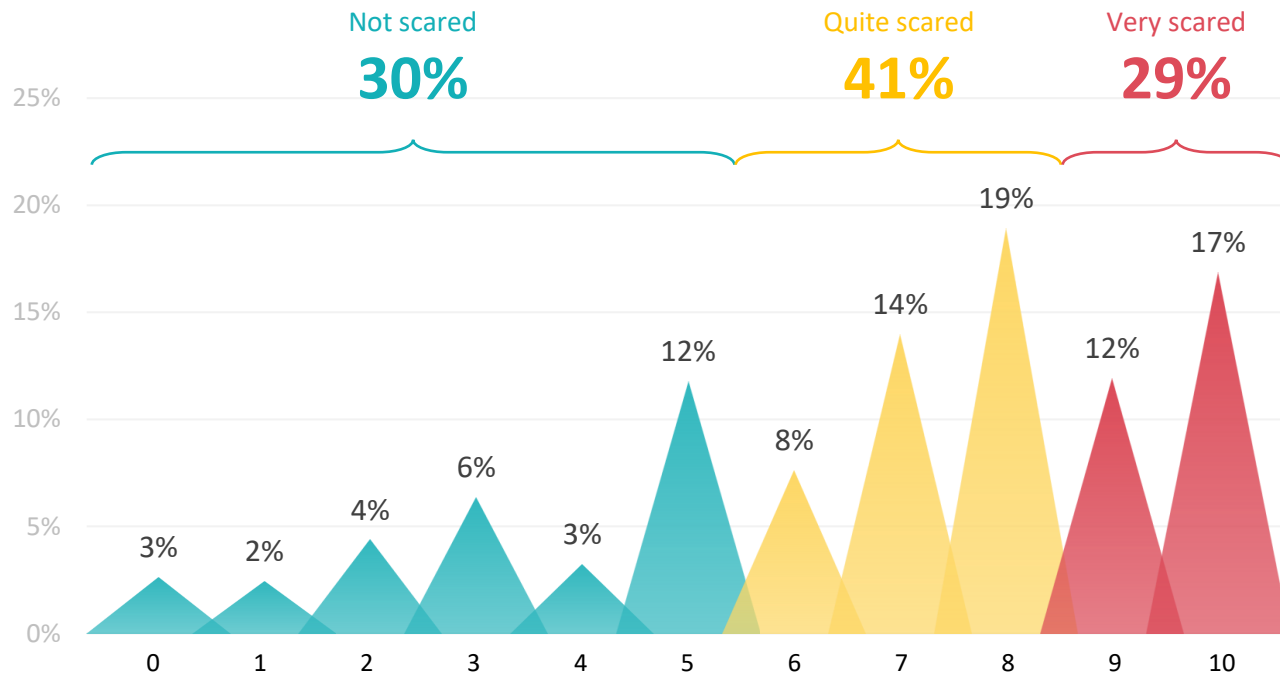


COVID-19 SHOCK



The level of fear of the virus remains high with 3 Poles out of 10 saying they are really scared. The data was collected right when the media talked about the new cluster in Lower Silesia.

Q1. Considering the Coronavirus crisis, on the scale from 0 to 10, how much do you worry for you and your relatives?





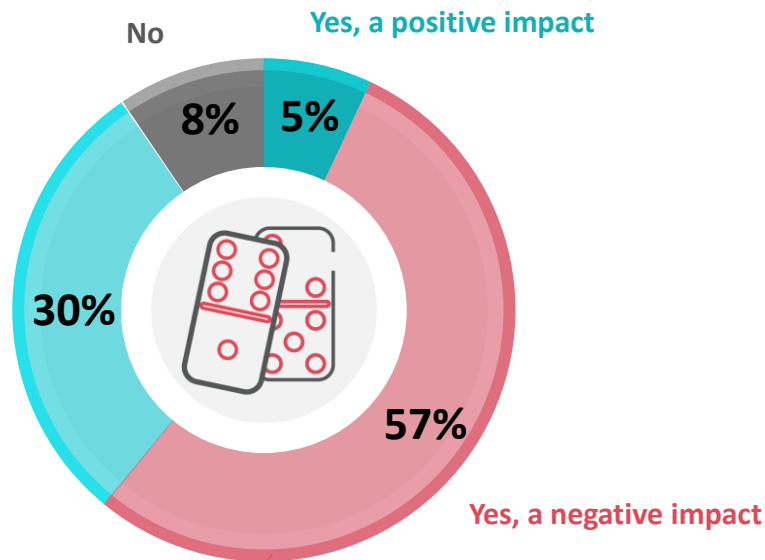
The pandemic brought not only fear, but also has a strong impact on people's lives. Mostly negative, for 57% of Poles.

Q2. Generally speaking, would you say that this crisis had an impact on your life?

92%
of Poles say the
Covid-19 crisis
impacted their life

...and mostly
negatively

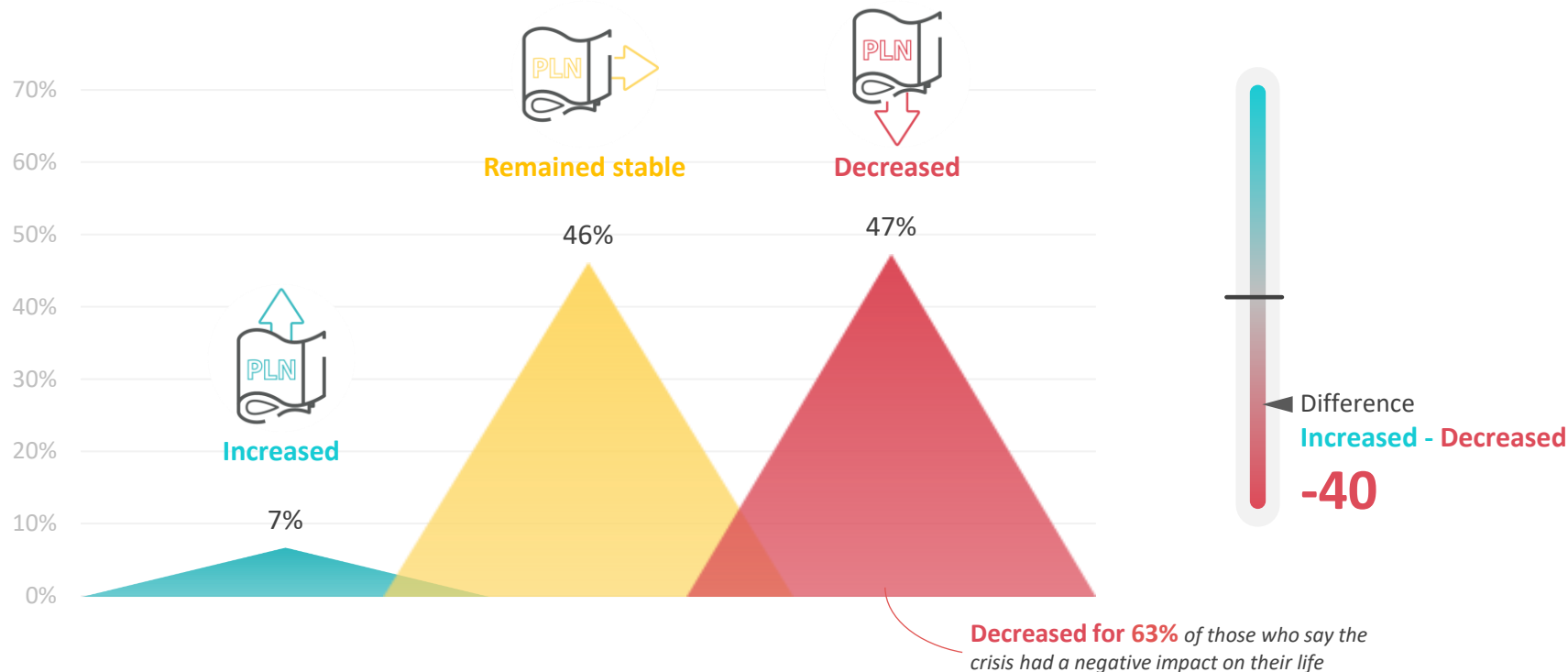
Yes, but neither
positive nor
negative impact





If almost half the population declare the crisis had no impact on their revenues, the same proportion went through a decrease of their incomes during the crisis

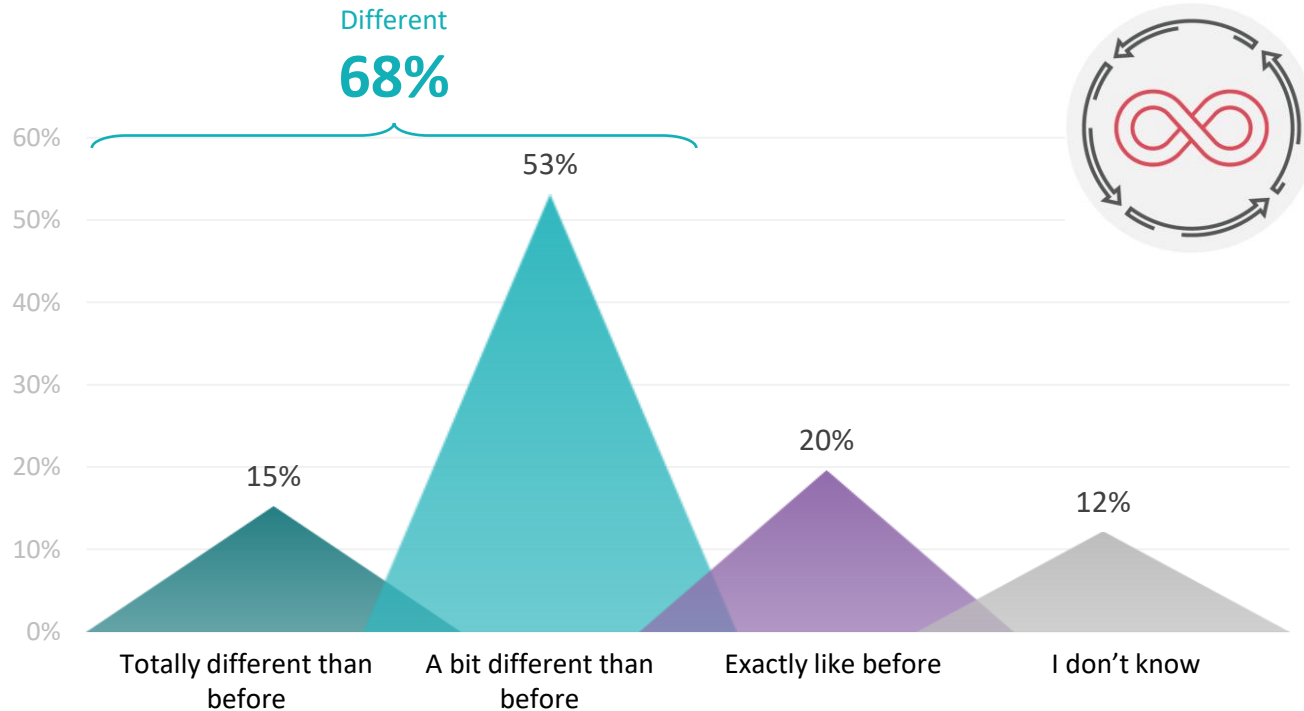
Q5. Over the last 3 months would you say that the incomes of your household have increased, decreased, or remained stable?





Most Poles think that their lives won't be the same after the crisis. 1 out of 6 Poles believes that New Normal will be even radically different.

Q3. Would you say that your life after the Covid-19 crisis will be...





However, despite the fear of COVID-19 and the feeling the crisis will impact their life in the long-term, most of the Poles intend to go back to their habits, as fast as possible for 43% of them. Only less than 10% thinks we need to change our habits and behaviours.

Q4. Now that the lock-down is over, would you personally like to...

Quickly resume your habits,
live as before as much as
possible

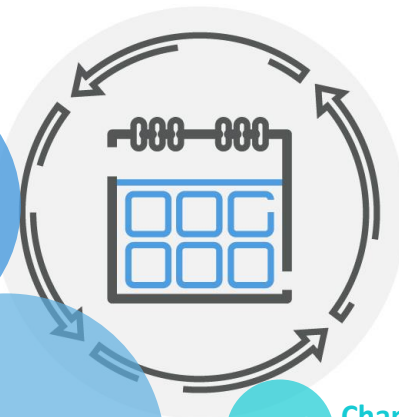
43%

Resume your habits little
by little

49%

8%

Change your
habits





New Normal

The analysis of New Normal includes 39 activities belonging to 6 main areas considered...

Relationships with
relatives and people



Work, education and
learning



Environment, sustainable
and responsible
consumption



Entertainment



Health and health
security



Consumption
habits



... using 3 key indicators:



Behavioral: is the activity done by Poles? is it done more than before the crisis?



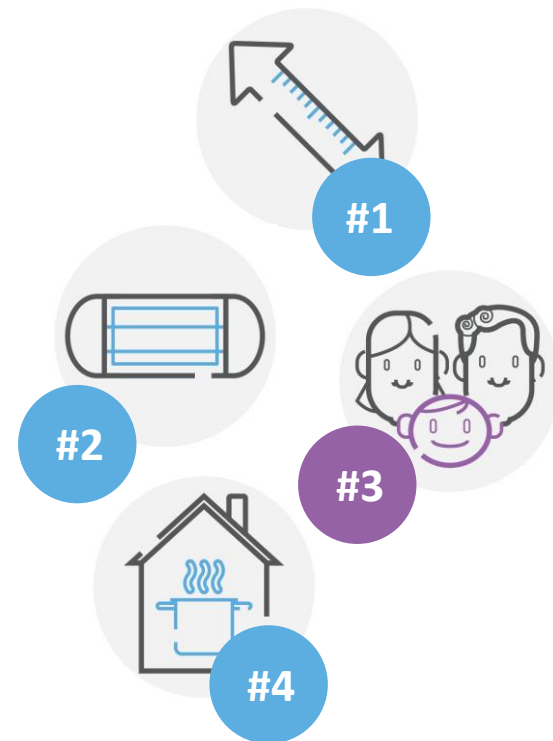
Projection: is the activity will last in the future?



Proximity: is the activity important for the respondents?



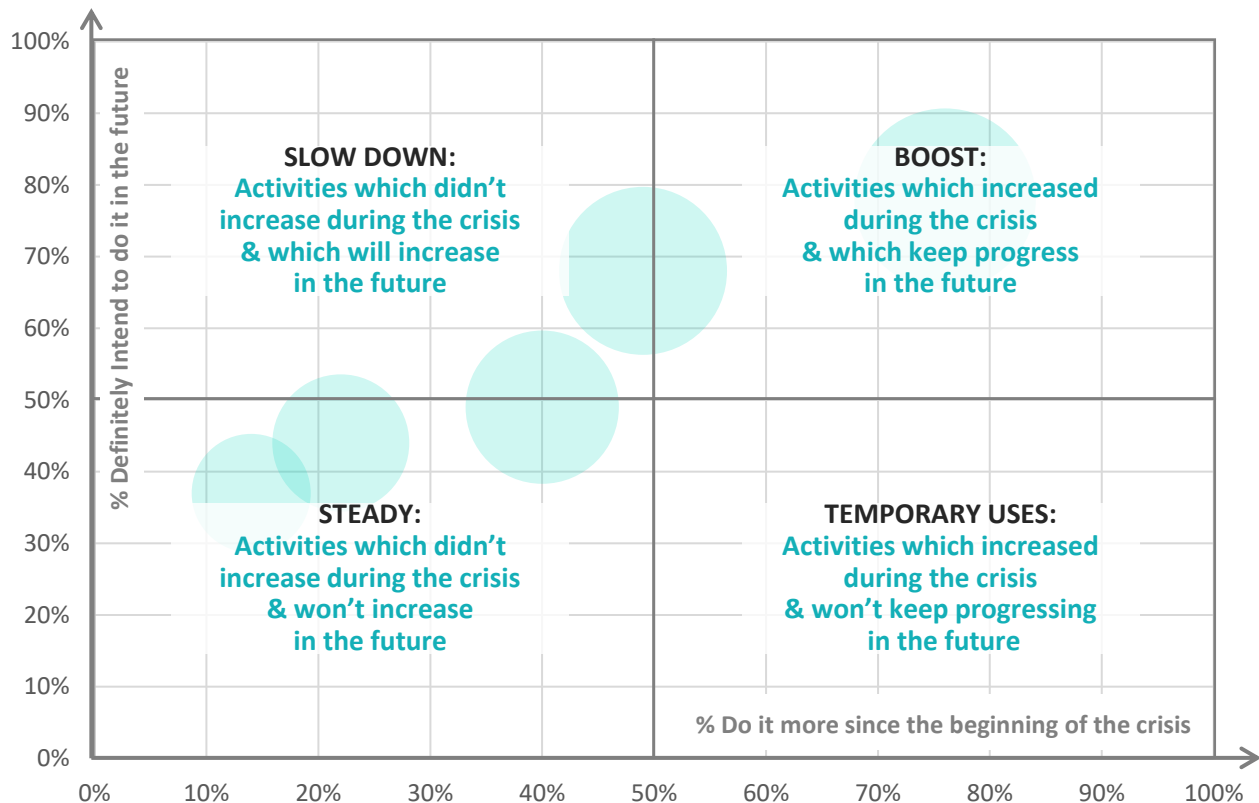
TOP20 activities boosted by the crisis during the lock-down. We see the mix of different areas of Poles' lives, but most of these are related to our health and relationships.



Bases: Did more often this activity in the last 3 months / *Only asked to Active respondents / **Only asked to parents

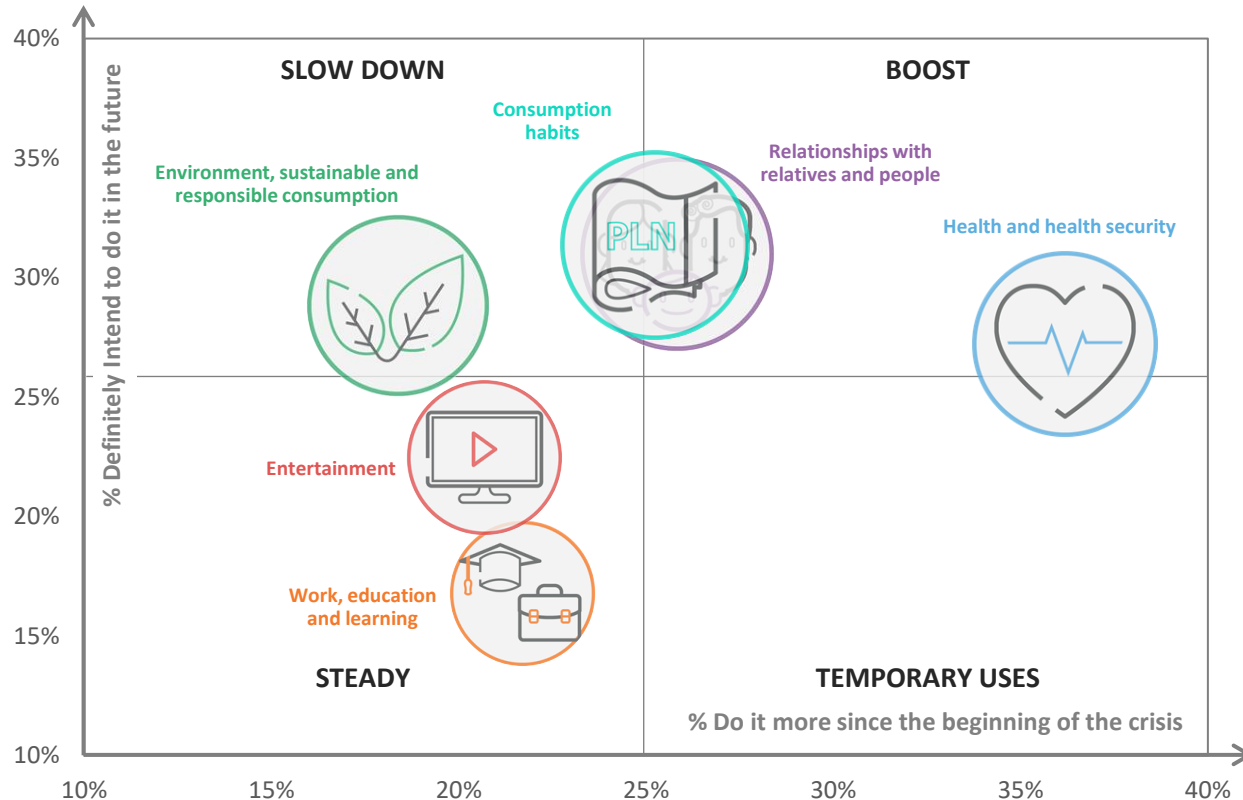


Which activities have progressed or were limited the crisis, and which one will keep developing in the next months?





Obviously, health is the main concern, progressing the most since 3 months and will keep progressing... but less than activities connected to consumption, relationships and environment which were slowed down by the crisis.

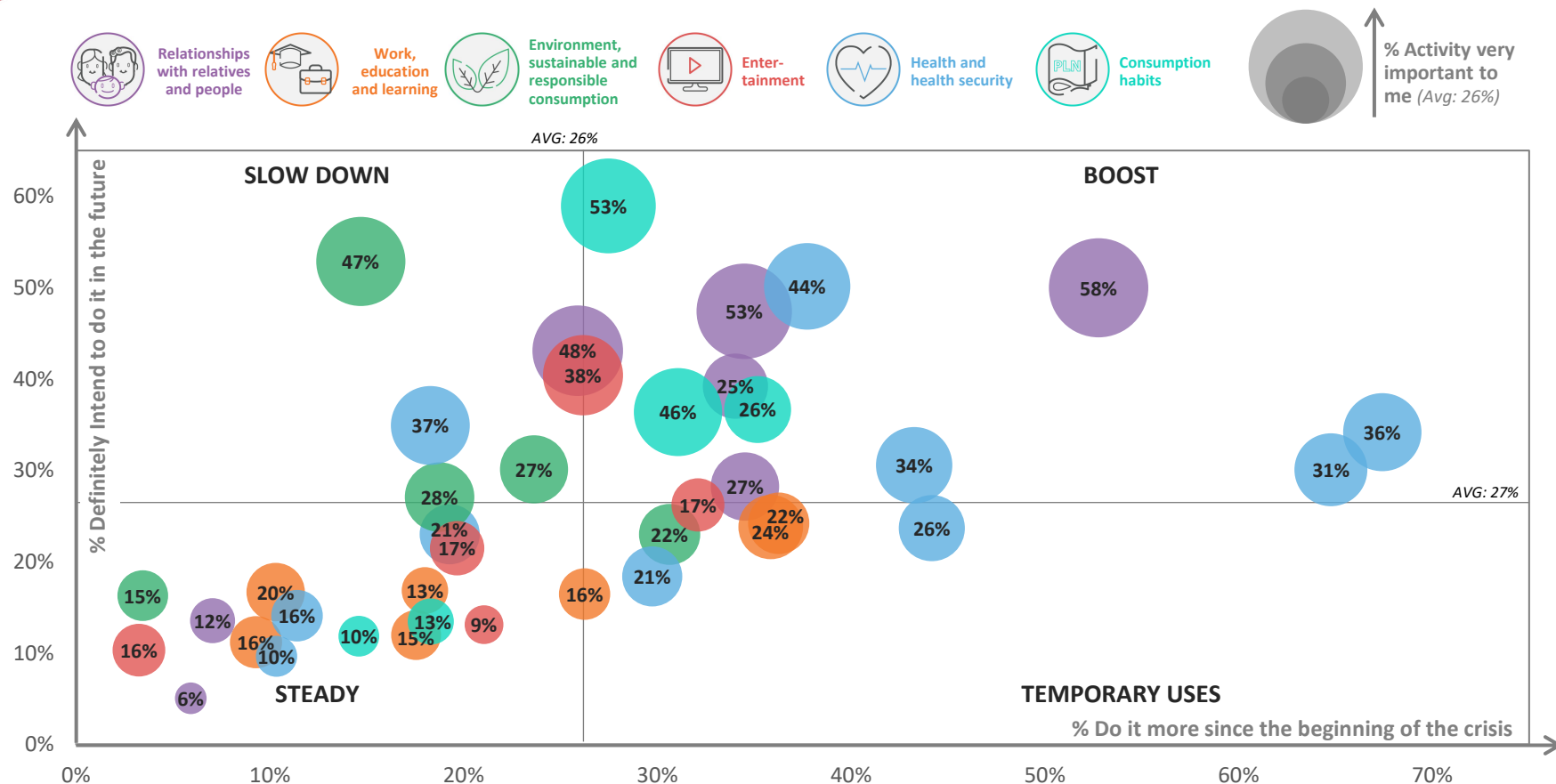


At the same time, activities related to environment, sustainability and aware consumption slowed down because of the crisis (still, Poles declare to get back to them in the future).

Work and entertainment remained steady. COVID-19 crisis did not have much impact here, nor there will be a significant change in the future.



Projecting the 39 items all together reveals which topics stick out in each of the the 4 sectors...





Projecting the 39 items all together reveals those sticking out in each of the the 4 sectors...

SLOW DOWN: Activities which didn't increase during the crisis & which will increase in the future

Environmental concerns and actions (limiting and sorting wastes, Using nonpolluting mean of transportation) slowed down during the crisis but appear as a priority for the upcoming months.

Other actions falling into same pattern:

Doing sport & Taking time to take care of yourself, spend quality time with your wife/husband or partner

The use of **collective transports, travelling abroad, change one's career, dating online, sharing one's sensitive personal data to improve collective organization, or working more to support the country's economic balance** are among the activities limited by the crisis and won't progress.

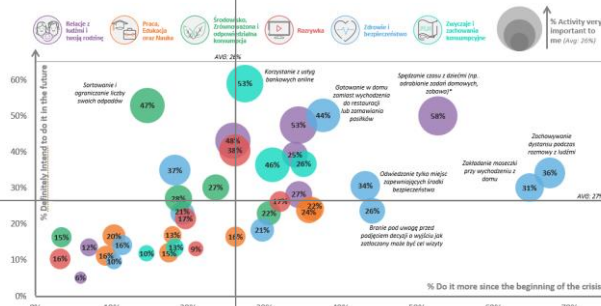
STEADY: Activities which didn't increase during the crisis & won't increase in the future

BOOST: Activities which increased during the crisis & which keep progress in the future

Activities boosted by the crisis with a bright future: **Use of online banking, quality time with the kids, cooking at home, social distancing, wear of mask, taking news of one's relatives, saving money anticipating harder times in the future, online purchase of Non grocery goods, using social networks...**

Activities boosted by the crisis with no perspectives: **Taking into account how crowded might be a place before deciding to visit it, telecommuting, working from home instead of going to the office/place of work, Using online video meetings apps for professional reasons, Using educative and learning platforms...**

TEMPORARY USES: Activities which increased during the crisis & won't keep progressing in the future





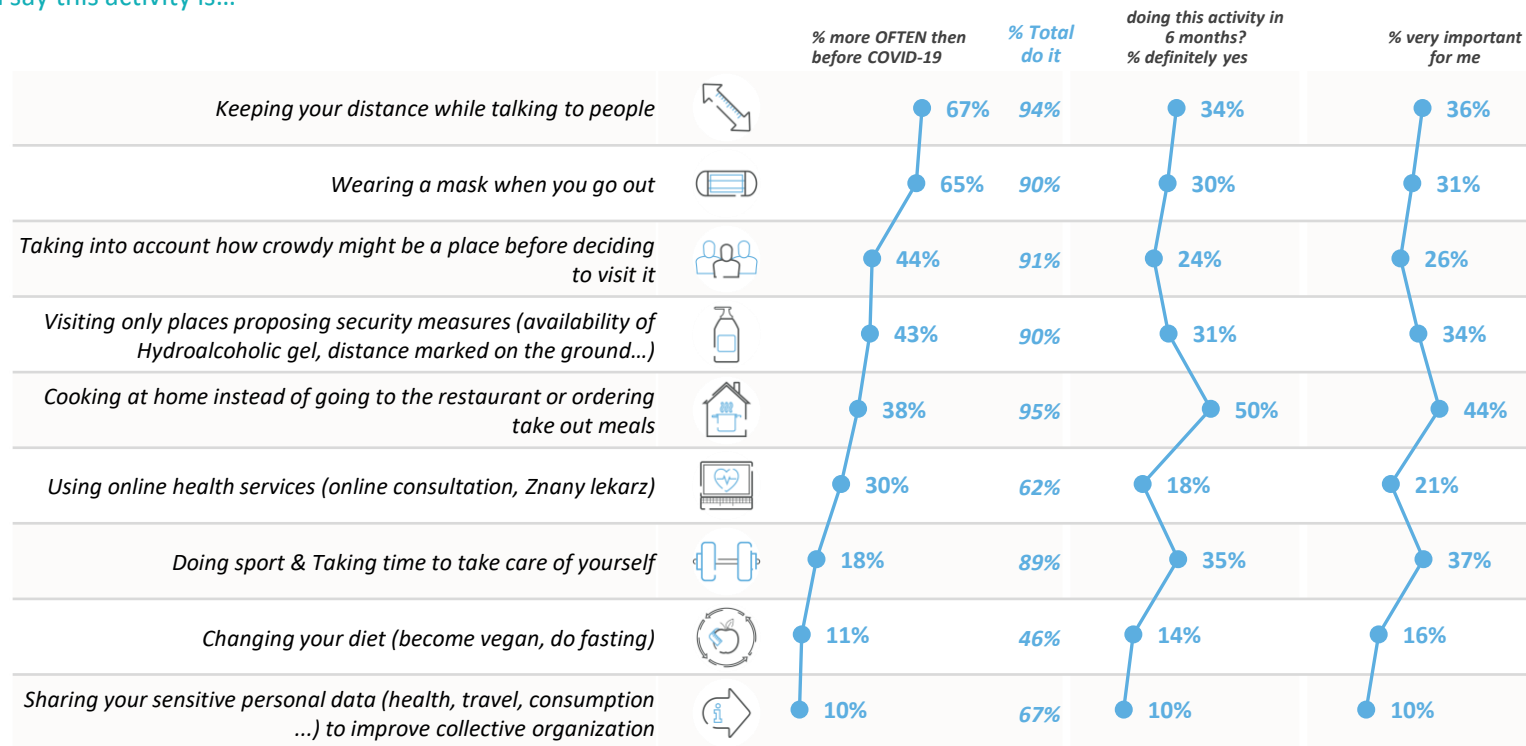
Within health care activities there are a lot of new ones, which were forced by the crisis. However, Poles don't intend to continue them in the future. What could really change is cooking at home!

P1. Since the beginning of the Covid-19 crisis, would you say you do this activity...

P2. And in 6 months, do you think you will be doing this activity?

P3. Would you say this activity is...

TOPIC
Health and
health security



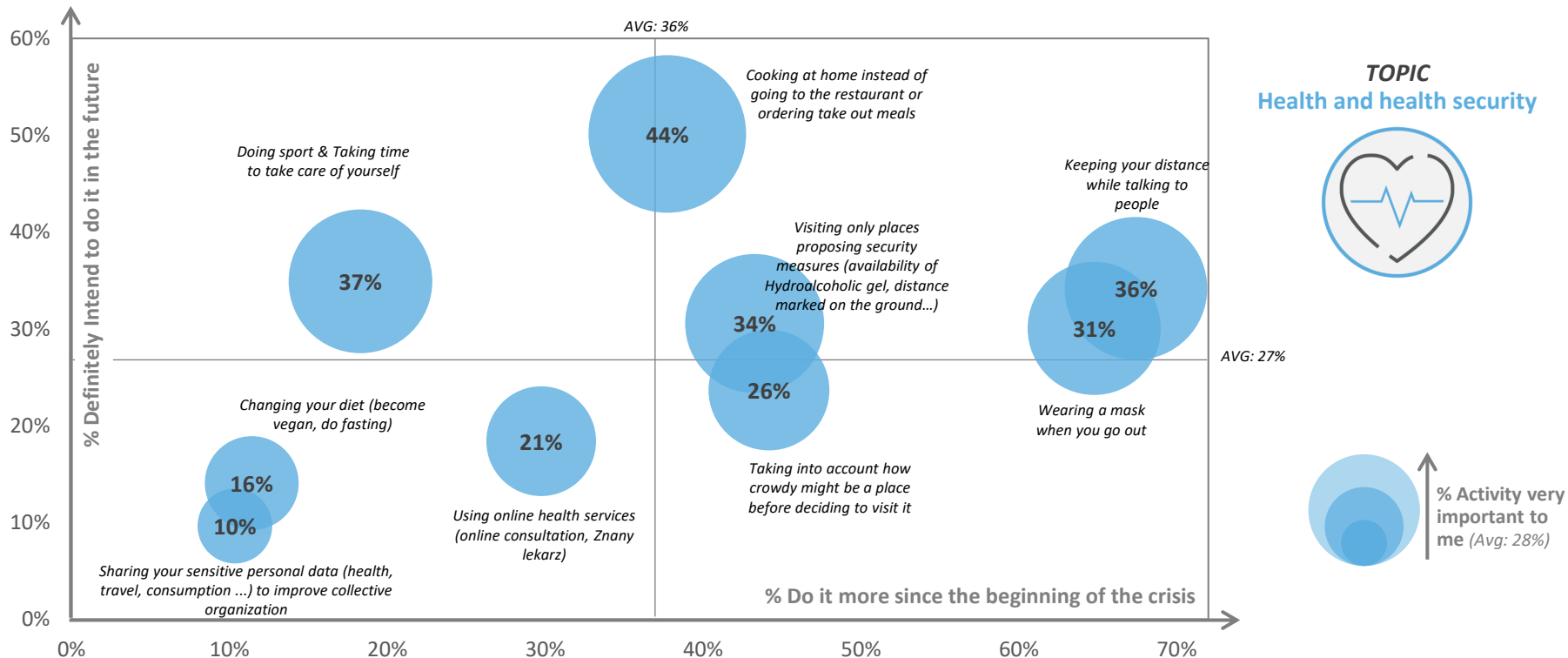


Sanitary measures (social distance, masks) have obviously progressed a lot the past 3 months and more than 30% of Poles intend to keep observing these habits in the next months. Home cooking is the most important health habit which has progressed a lot and 50% say they will definitely keeping doing it. Sport activities were limited during confinement and Poles show the will to catch up in the next months.

P1. Since the beginning of the Covid-19 crisis, would you say you do this activity...

P2. And in 6 months, do you think you will be doing this activity?

P3. Would you say this activity is...





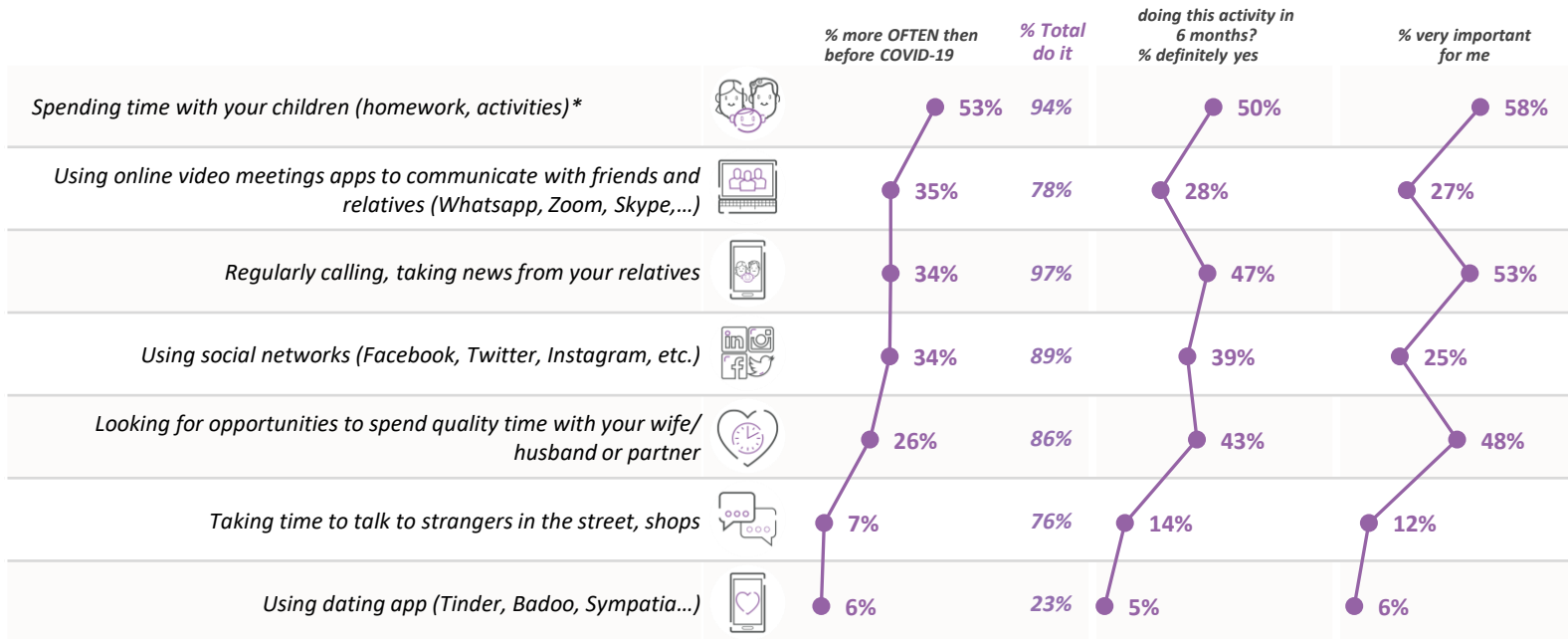
COVID-19 crisis enabled to re-discovered some of our relationships. Most often, with own kids and taking news of one's relatives.

P1. Since the beginning of the Covid-19 crisis, would you say you do this activity...

P2. And in 6 months, do you think you will be doing this activity?

P3. Would you say this activity is...

TOPIC Relationships with relatives and people



*Only asked to parents

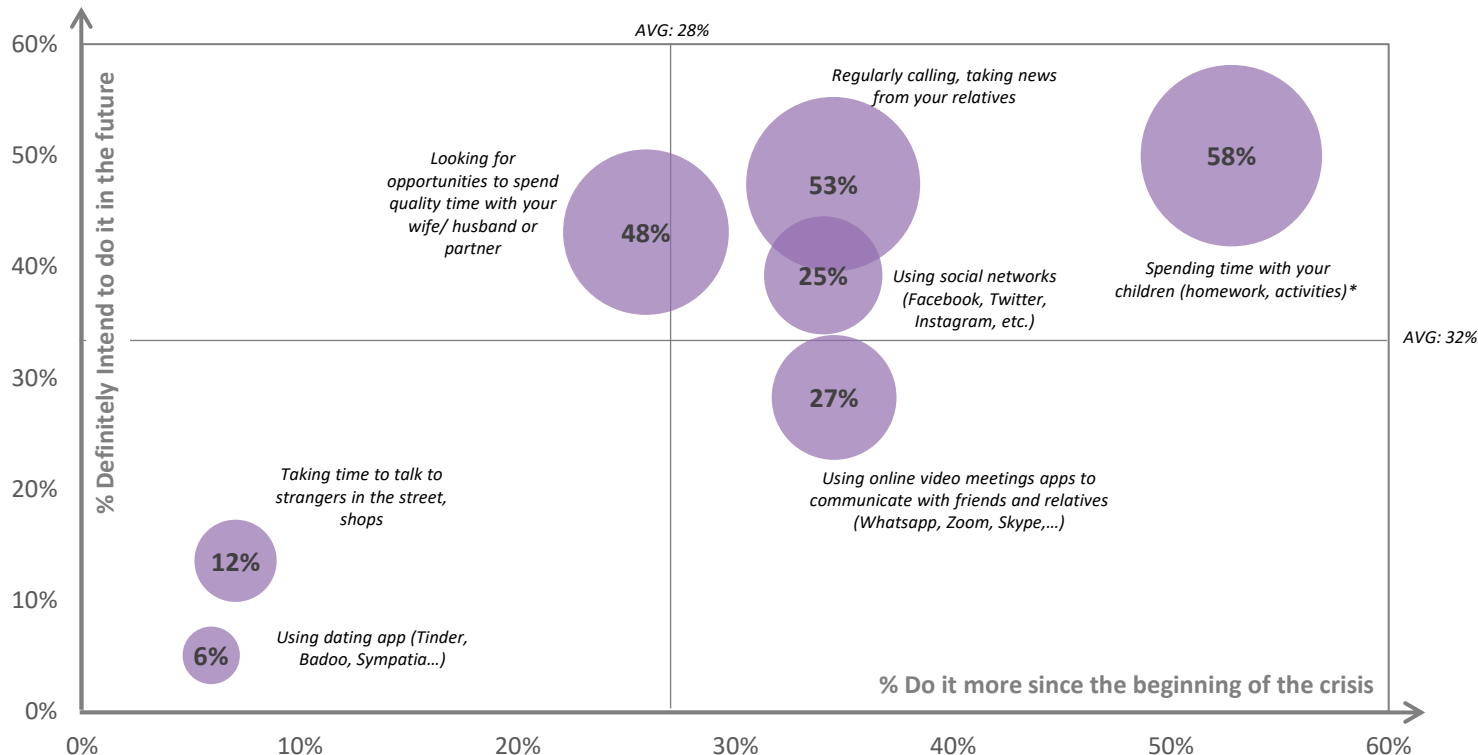


Quality time with the children and partner, and taking time to take news from the relatives are boosted by the crisis. The use of online video chat for private reasons accelerated during the lockdown but Poles don't seem to intend developing this habit in the future.

P1. Since the beginning of the Covid-19 crisis, would you say you do this activity...

P2. And in 6 months, do you think you will be doing this activity?

P3. Would you say this activity is...



TOPIC
Relationships with relatives and people



% Activity very important to me (Avg: 33%)

*Only asked to parents



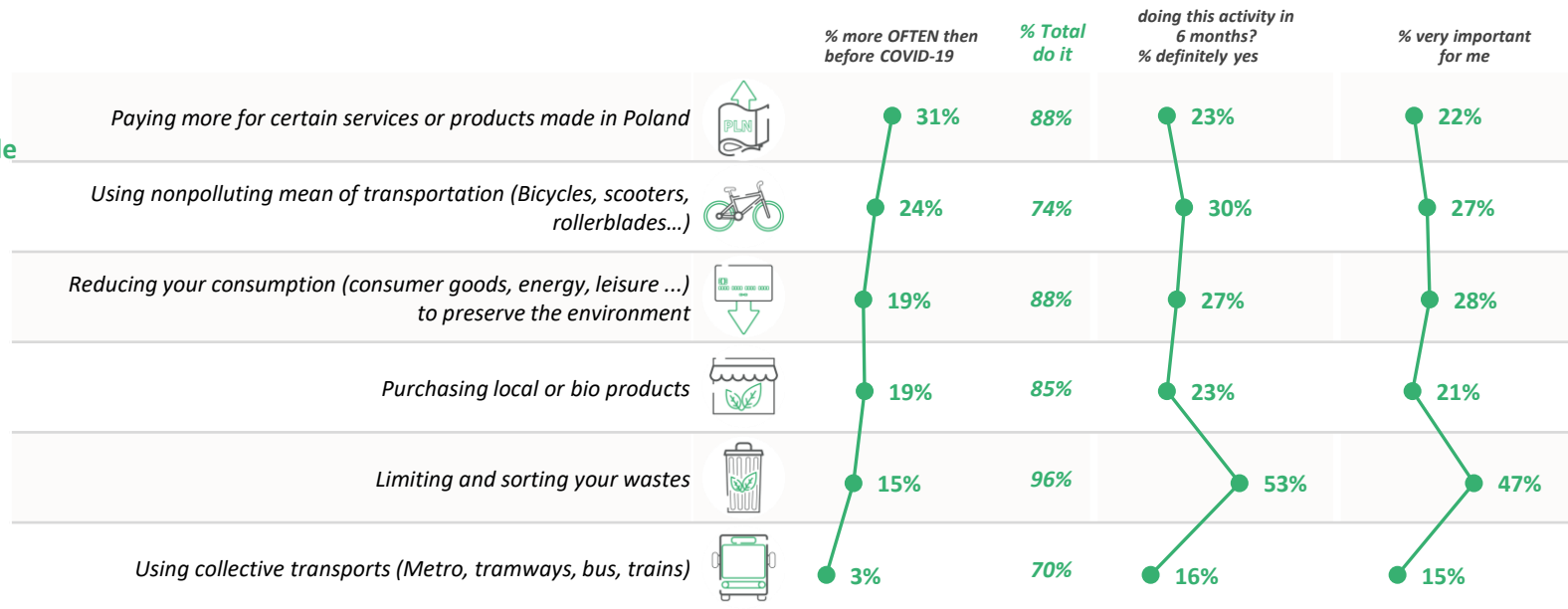
Taking care of environment, sustainability and ecology slowed down due to COVID-19, but many Poles strongly believe they will continue them when crisis is over.

P1. Since the beginning of the Covid-19 crisis, would you say you do this activity...

P2. And in 6 months, do you think you will be doing this activity?

P3. Would you say this activity is...

TOPIC Environment, sustainable and responsible consumption



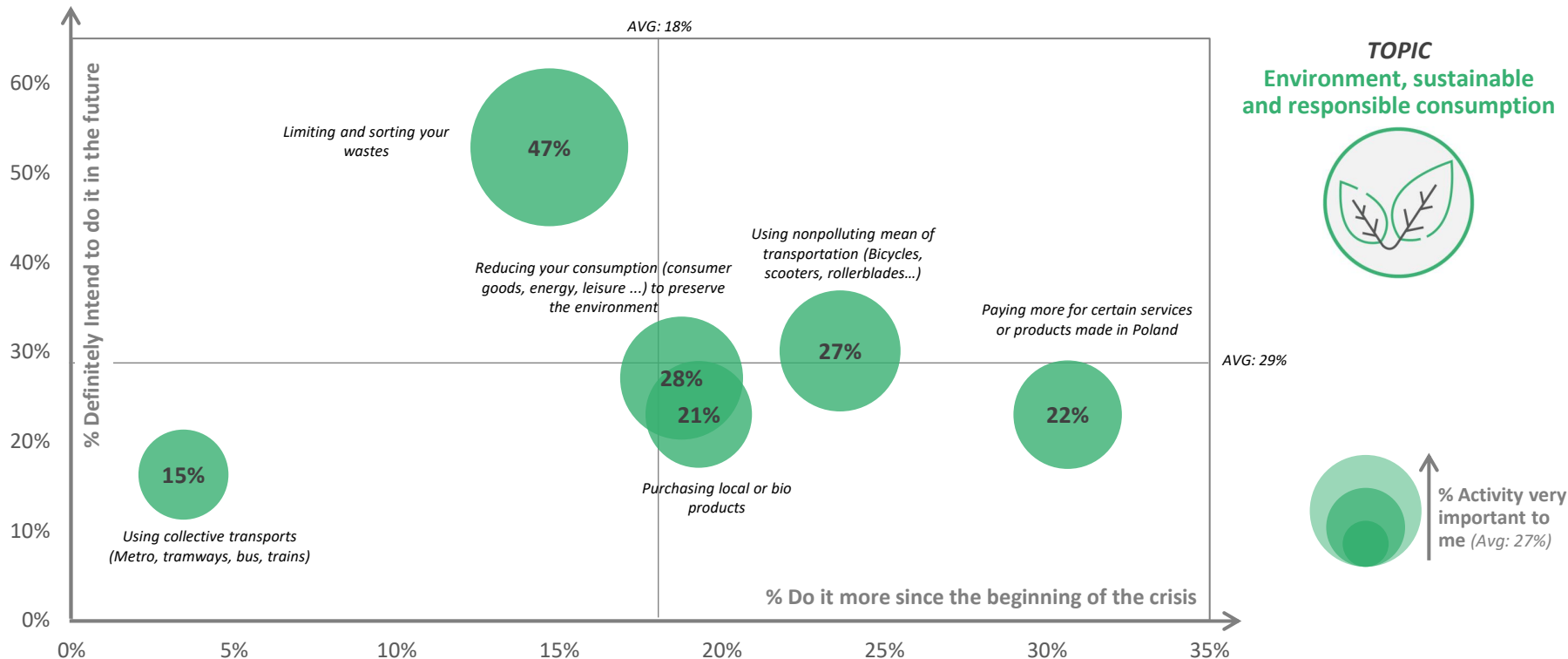


Overall, ecology and responsible consumption suffered during the crisis (1 out of 3 or less have developed behaviours related), and don't seem to be progressing in the future apart from the attention paid to one's wastes (limiting and sorting trashes)

P1. Since the beginning of the Covid-19 crisis, would you say you do this activity...

P2. And in 6 months, do you think you will be doing this activity?

P3. Would you say this activity is...





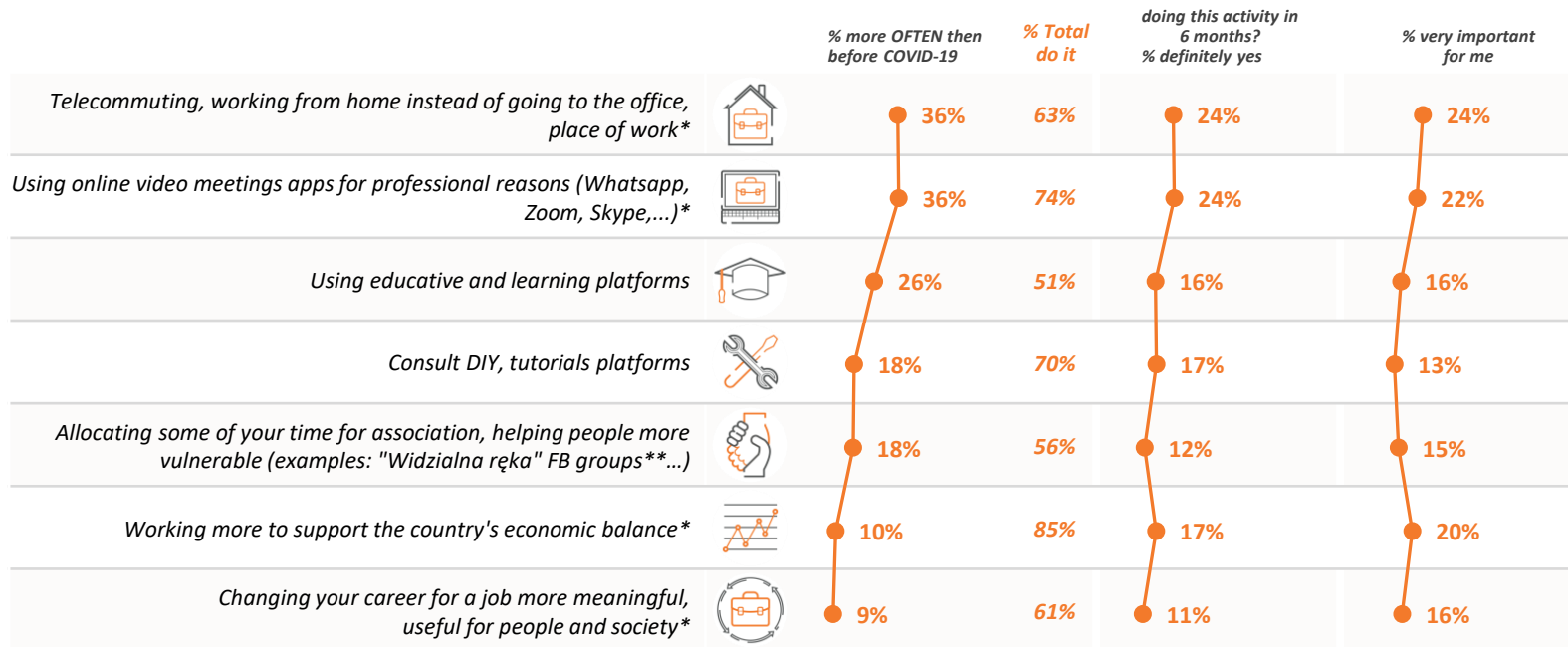
Although telecommuting and using digital communication tools withing work was intensified because of the crisis, limited number of Poles want to continue these in the future, nor consider it really important.

P1. Since the beginning of the Covid-19 crisis, would you say you do this activity...

P2. And in 6 months, do you think you will be doing this activity?

P3. Would you say this activity is...

TOPIC
Work, education
and learning



*Only asked to active respondents / **Allocating some of your time for association, helping people more vulnerable (examples: "Widzialna ręka" FB groups, "Wzywamy posiłki" initiative - meals for medical workers; also: Hot16 Challenge which united many Polish artists and influencers - the aim was to raise money for Polish health system during coronavirus pandemic)

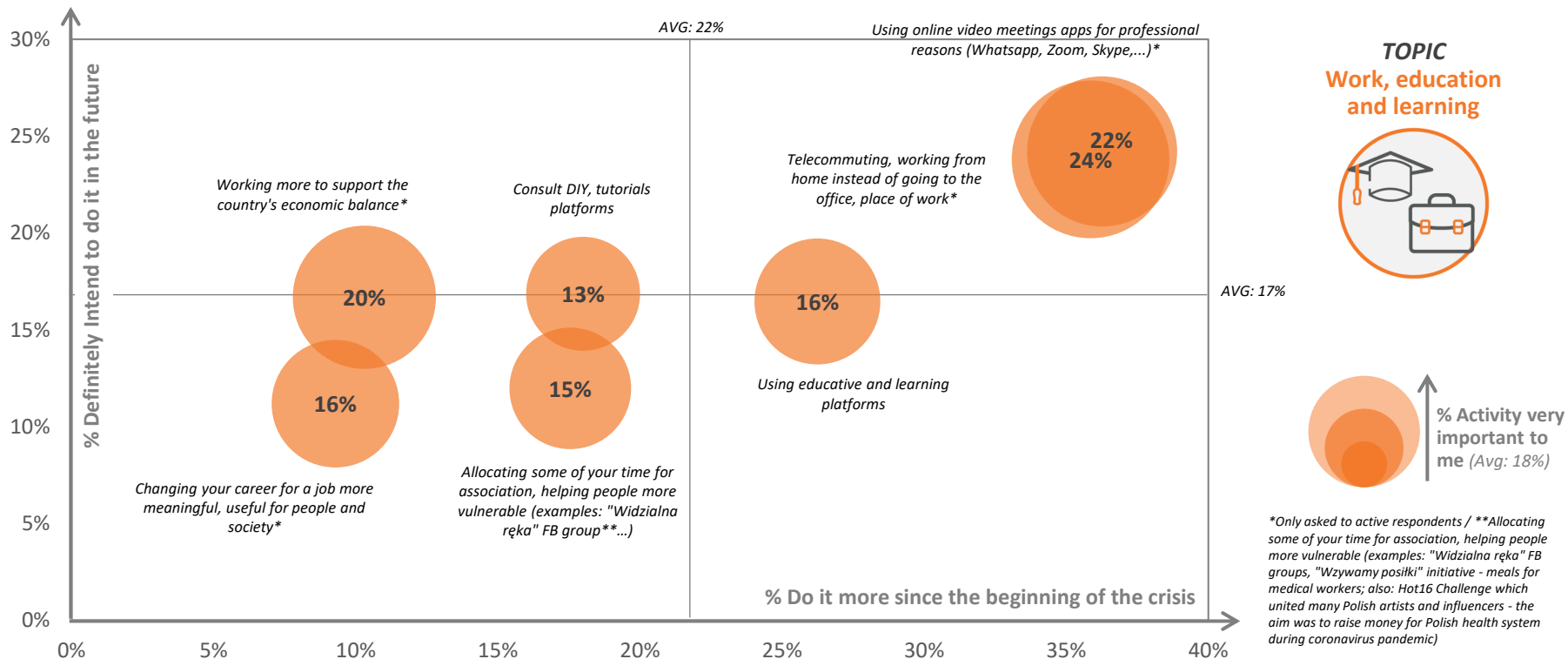


However, within the professional area these two (use of online video platforms, telecommuting) are the activities which got the highest boost and appear to keep progressing in the future.

P1. Since the beginning of the Covid-19 crisis, would you say you do this activity...

P2. And in 6 months, do you think you will be doing this activity?

P3. Would you say this activity is...





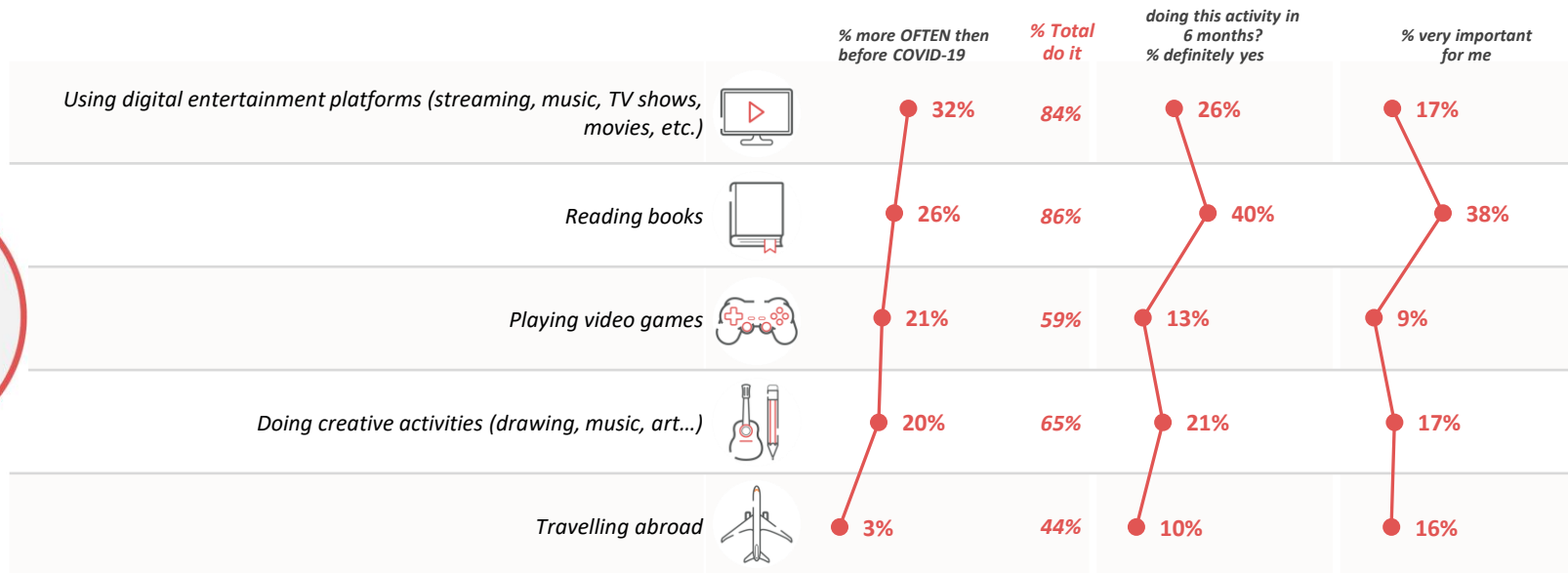
COVID-19 didn't bring any revolution to how Poles want to entertain. Although usage of digital/ streaming entertainment platforms keeps on growing, the Poles declare they re-discovered reading the books and would like to progress this in the future.

P1. Since the beginning of the Covid-19 crisis, would you say you do this activity...

P2. And in 6 months, do you think you will be doing this activity?

P3. Would you say this activity is...

TOPIC
Entertainment



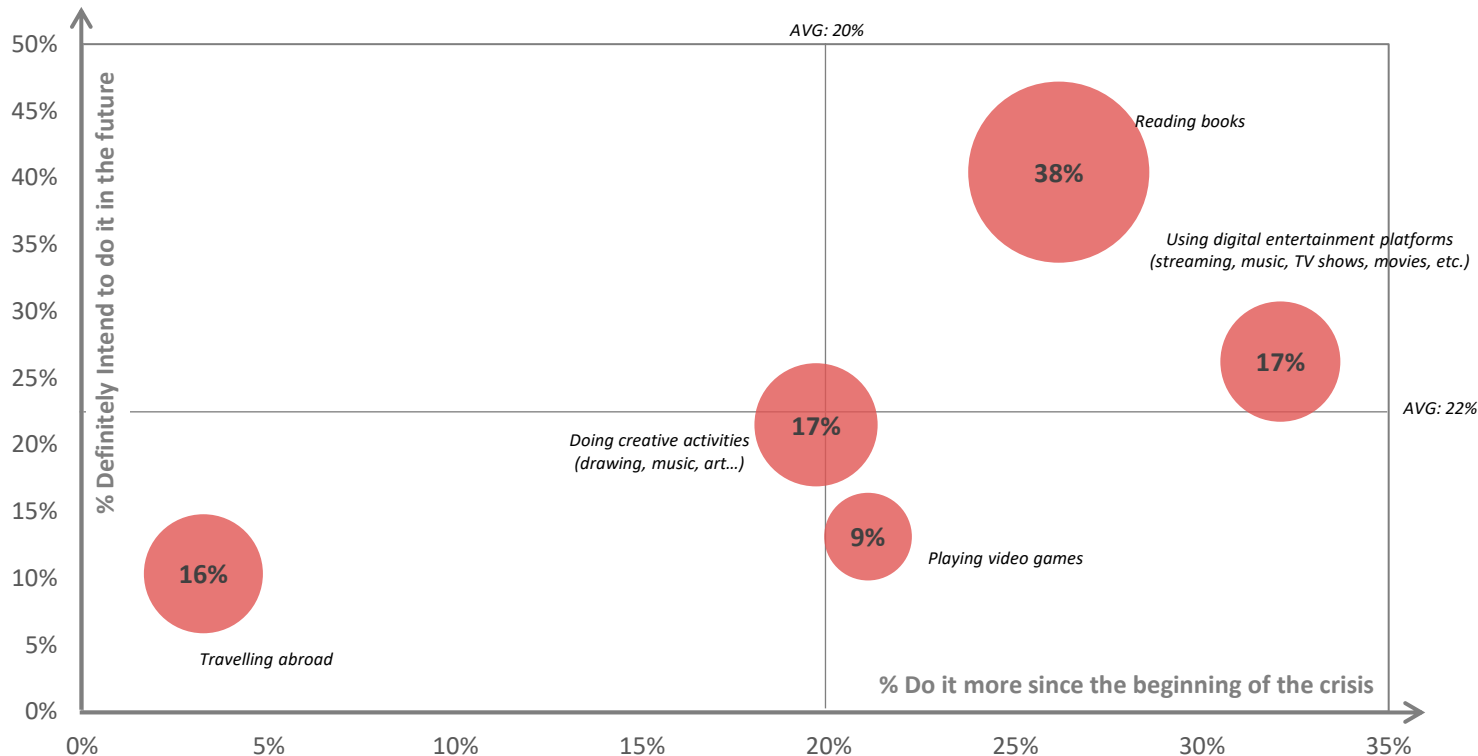


Confinement had a great impact on the book reading with a quarter of Poles who declared they read more than before. An important activity to them which should last in the future. The same for online entertainment platforms who won a lot of new subscribers. Video games has progressed during lock-downs but this doesn't seem to be something which will last.

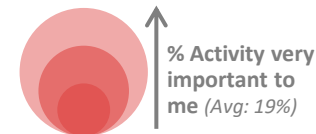
P1. Since the beginning of the Covid-19 crisis, would you say you do this activity...

P2. And in 6 months, do you think you will be doing this activity?

P3. Would you say this activity is...



TOPIC
Entertainment





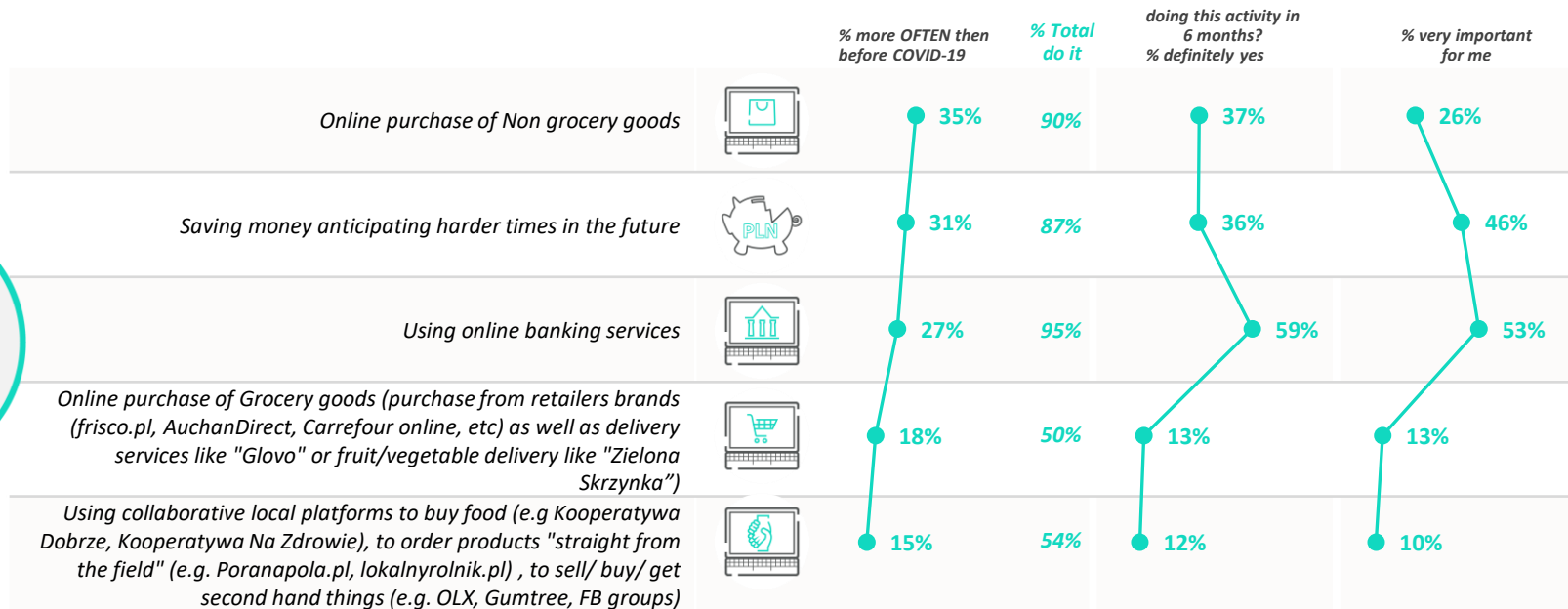
Online shopping is the action which was most boosted by COVID-19. However, slightly more than 1/3 of Poles wants to shop online after crisis. The online banking looks more promising here and have a chance to progress significantly.

P1. Since the beginning of the Covid-19 crisis, would you say you do this activity...

P2. And in 6 months, do you think you will be doing this activity?

P3. Would you say this activity is...

TOPIC Consumption habits



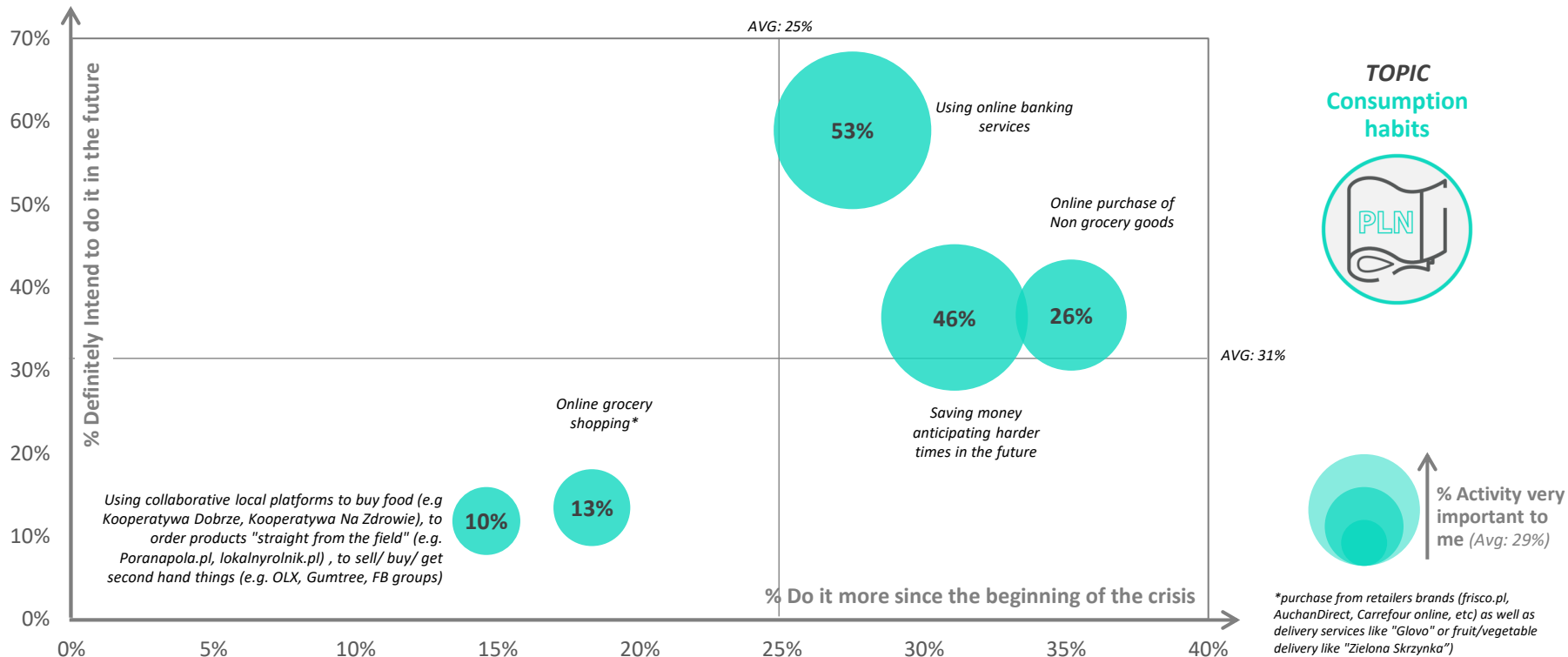


Online banking is the winner in terms of new & long-lasting habits: 27% accelerated their use of such services and 59% intend to use it in the future. Online non grocery shopping progress as well, more than grocery segment. Saving money for the future has also progressed and this trend doesn't seem to be restricted to the crisis itself.

P1. Since the beginning of the Covid-19 crisis, would you say you do this activity...

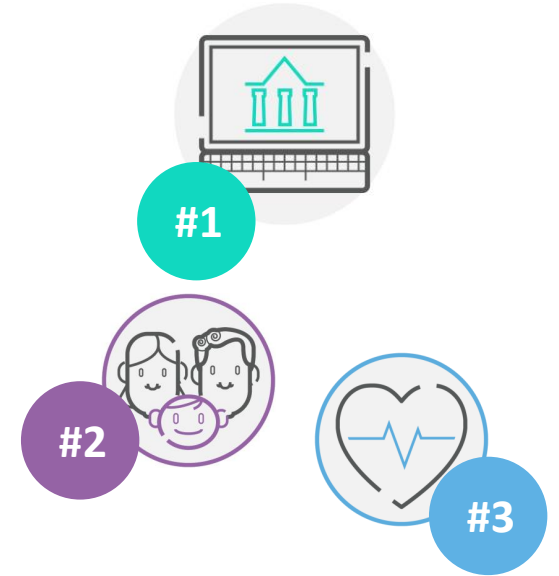
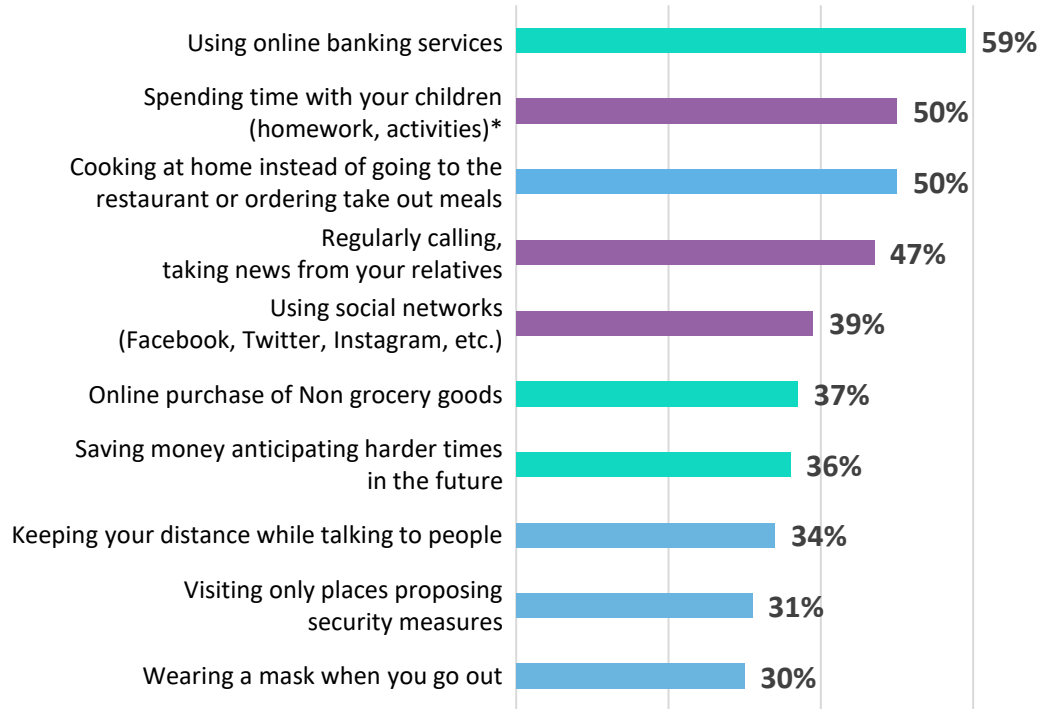
P2. And in 6 months, do you think you will be doing this activity?

P3. Would you say this activity is...





When we look at TOP10 of the most promising actions, which will be taken in the future, we see a different composition and share of particular areas than these which were mostly boosted.



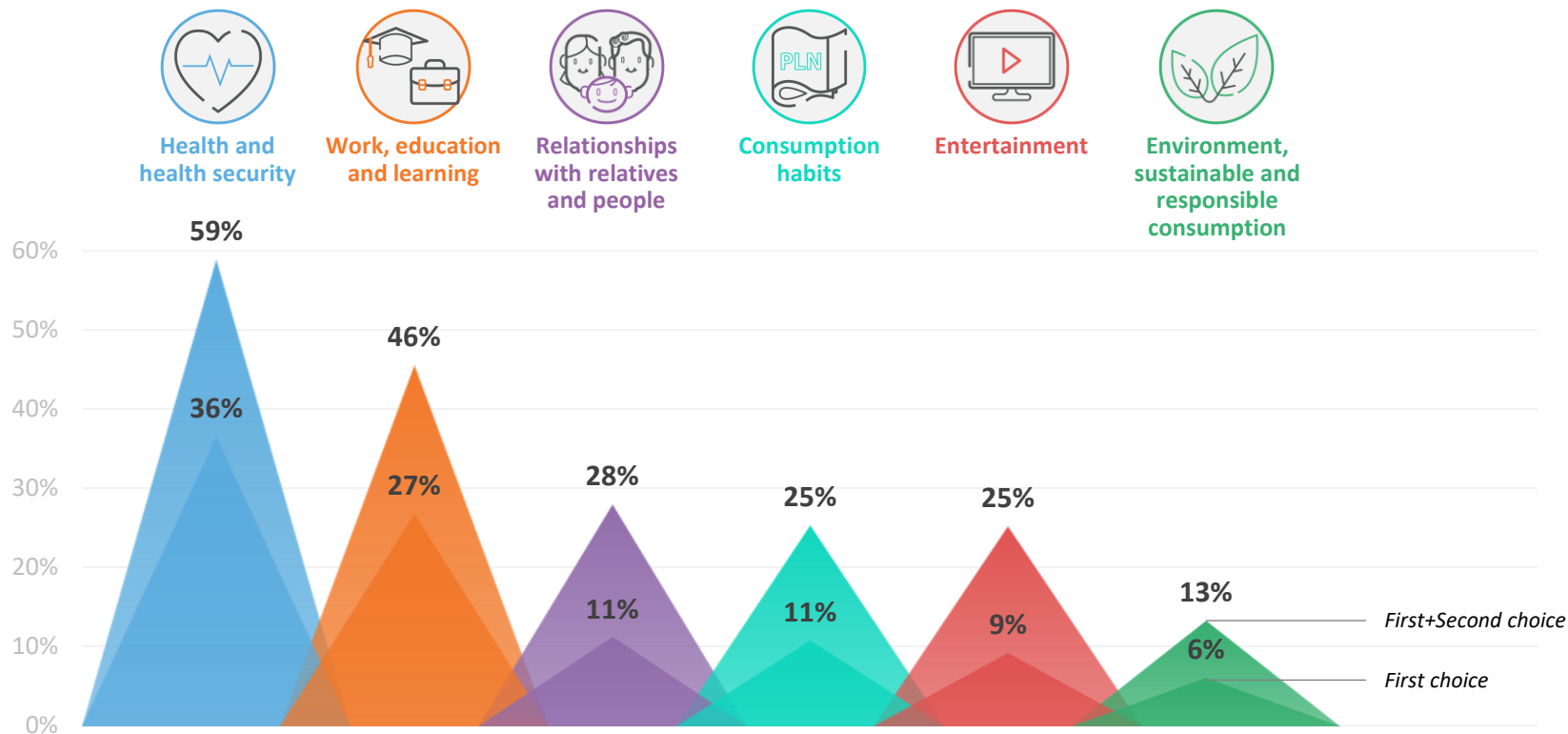
Bases: All respondents / *Only asked to parents



**Areas most
impacted**

Poles believe that Health, Work & Education and Relationships are the areas which will be the most affected by COVID-19 crisis

Q6. Finally, among the following topics, which one do you think will be more impacted by the Covid-19 crisis?





Concerns about COVID-19 impact of Health revolve around many different topics, starting from access and availability of healthcare specialists and stress and depression an everyday hygiene.

Q6b. Why do you think that /-Display answer Q6-/ is the area that will be more impacted by the crisis?

Open-ended

Health and health security



59%

Have quoted this dimension as one of the most impacted



“Difficulties in access to GPs and specialists”

«It already affects the operation of the health service. There are problems getting to specialists. »
«Difficult access to doctors means that people do not use medical care in the event of disturbing symptoms, which will affect the deterioration of health and well-being. »
«It has already happened, at the moment you can not go to the doctor normally and examine yourself, I only pray that my children will not get sick because I have nowhere to go to the doctor with them - everything is closed. »



“Total concentration of health care on the fight against coronavirus (cancelled procedures, operations)”

«Other diseases have been set aside, surgery has been postponed or cancelled, visits to the dentist have decreased, now you need to add extra protection funds. »
«The state transformed hospitals into crisis centres, which often received zero patients. The really sick could not use them then. This is crazy. Poland is ruled by morons »
«Because we see during a pandemic, people have a difficult time getting treatment for other diseases, often dying because of a lack of treatment, because now only "coronavirus" is considered »



“Stressed out society, depression epidemic”

«Pandemic awareness and the risk of infection is very stressful»
«Greater stress in people, depression»
«Because a lot of people cope with this situation having mental problems, especially people dependent on other family members lack of work social and living conditions lack of fund»



“Greater public care for health, in particular hygiene”

«All people, at least I hope so, will pay more attention, and consequently, take care of their own health and the health of others. I trust that they will care more about hygiene and wash their hands more often, they won't cough and wheeze in public »
«People will be more careful about what they do and how to behave in crisis situations»
«Activities done, i.e. washing hands, caution in contacts and other habits will remain for a long time, and they have already shown that they have statistics of cases also in case of other diseases»



COVID-19 impacts Work & Education on various fields, but first of all in terms of job cuts and significant restrictions to some professions. However, it also creates a challenge for educational system and make Poles understand they will need to be more adaptive in the future.

Q6b. Why do you think that /-Display answer Q6-/ is the area that will be more impacted by the crisis?
Open-ended

**Work, education
and learning**



46%

**Have quoted this
dimension as one of
the most impacted**

“Job cuts”

«The labor market has collapsed a bit, many employers do not want to hire employees, there are redundancies from workplaces, the farmer has collapsed»

«A lot of employers were forced to dismiss their employees, because they were not able to pay them wages, because they had closed restaurants, for example, and children, young people were forced to stay at home and seek education»

«A lot of people are losing their jobs at the moment, which means that they have less money for living; a similar situation is with education, where students are not sure that the core curriculum has been fully implemented, and probably when they return to school they will have to »

“Ineffective distance learning”

«During quarantine, children had to do their own lessons. It relates to the fact that all the material will have to be repeated with the children again, which means that from September learning will be much faster, which may cause that more children will need tutoring »

«Education has changed dramatically; online learning is not an effective form. The lecturers are not able to explain everything. When it comes to work in many industries, there has been a crisis due to the pandemic »

“Forced restrictions affecting certain industries: hairdressing, tourism, gastronomy”

«People will not use services such as a beautician, hairdresser etc. so that people will have less work, and with science and education there is already a problem, for example, how to see the final exams in June;)»

«Restrictions in the tourism, hotel, catering industry have already negatively affected the level of employment. Remote education of children and youth will not ensure an adequate level of education. »

“Constant change of work / study mode in the future, even after the pandemic has ended”

«The changes that had to be made during the crisis (e.g. work and remote learning) may remain partly permanent. In addition, there were significant layoffs. »

«Solutions used during the crisis can also be used during normal everyday life. At the same time, the crisis caused "a lot of hesitation for these areas, e.g. delayed final exams or school enrolment, the effects of which will certainly show up in the next people will realize how many things can be done remotely »

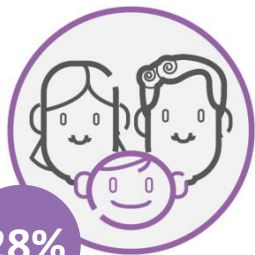


COVID-19 also put Poles relationships in the test. On one hand, we fear we will become more distant to each other, on the other hand – we miss our relatives and close ones, but have an issue with living 24/7 with our families.

Q6b. Why do you think that /-Display answer Q6-/ is the area that will be more impacted by the crisis?

Open-ended

Relationships with relatives and people



28%

Have quoted this dimension as one of the most impacted



“Introversion”

«People will not be eager to meet like they used to, there will be no such connection, it will be associated with a virus»

«During pandemic, I am less likely to be among people and feel that this isolation can cause me the fear of meeting people»

«I see and observe what is happening every day. People who are more and more introverted only care about their own interests. COVID only made it worse. »



“Longing, appreciating loved ones”

«People will appreciate loved ones»

«I am longing for family and friends. I did not know that the time spent with them was so important to me. »

«I am beginning to appreciate the fact that I could visit them and hug them at any time.»



“Deterioration of relationships with loved ones through long, shared life in isolation”

«I spend too much time with my family, I need a break»

«Because we spend too much time together haha»

«Too much time spent only with household members, long distance from friends»

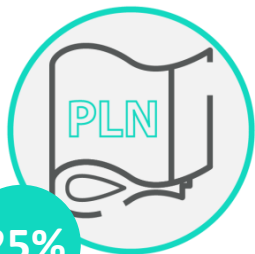


Impact on consumption habits is probably most broad as Poles believe it will bring a change not only on individual level, but also in public sector and last but not least – Poland economy.

Q6b. Why do you think that /-Display answer Q6-/ is the area that will be more impacted by the crisis?

Open-ended

Consumption
habits



25%

Have quoted this
dimension as one of
the most impacted



“Lasting impact of a pandemic on people’s habits”

«People have changed some of their habits and some will not return to old habits»

«Currently mandated requirements will remain in the psyche of people for a long time»

«The current pandemic has taught people certain discipline, culture and behavior in many different places. This positively affected relationships in stores, at work and in many other places. We had to give up theater, cinema, trips, flights »



“Changes in the functioning of public services”

«Restaurants don't work as they used to and other public places »

«Most of us contact our family at a similar level as before, and sometimes even more often, e.g. so that grandma doesn't have to go to the store. But the possibility of normal functioning and "consuming" products is very limited »



“Voluntary avoidance of public places”

«Because the greatest activity among people occurs during consumption»

«It will never be the same again in a shop or other place there will always be fear of another person»



“Increasing popularity of online shopping”

«Because these behaviors have already changed, much of the trade and banking has moved to the internet and will not come back»

«Because there is more confidence in ordering various types of products via the Internet»



“Inflation”

«People will stop buying more products because their price will rise due to both inflation and work stoppages in enterprises. »

«Prices will rise, and unemployment and low wages can teach people to buy smart and change their behavior towards other people as well.»



Poles see that COVID-19 will strongly impact several areas of entertainment as people will quit some ways of entertainment and some can't take a place because of the restrictions.

Q6b. Why do you think that /-Display answer Q6-/ is the area that will be more impacted by the crisis?

Open-ended

Entertainment



25%

Have quoted this dimension as one of the most impacted



“Voluntary avoidance of public places”

«In these places it is difficult to avoid contact and keep the distance of about 2 meters»

«People are still afraid of larger groups such as concerts and festivals. »

«Because this is the only field that does not need to be done. You can opt out of it without any damage. Go, learn, heal your needs »



“No access to entertainment due to restrictions ”

«Due to restrictions in gyms, cinemas, swimming pools, many people will wonder if they want to go at all. Still disinfecting everything is problematic for both customers and entrepreneurs, not to mention the costs »

«I am a fan of sport, especially speedway, which due to epidemics declines financially without supporters, it is a sport that needs as many supporters as possible to survive it will take several years before it returns to the highest level»

«It is severely limited, there are restrictions. Musicians, Actors etc. They have no chance of earning money because they can't do their job. It will take a long time before shows or concerts are possible. »



“Bankruptcy of entertainment facilities”

«Lack of grouping means that discos, pubs, cafes, etc. lose a lot of income»

«Because she lost a lot of money»



“Resignation from entertainment for savings purposes”

«In crisis, the less people have funds, the less they spend on entertainment»

«Because this industry has suffered the largest financial losses and to save, it begins to raise prices and few can afford entertainment»

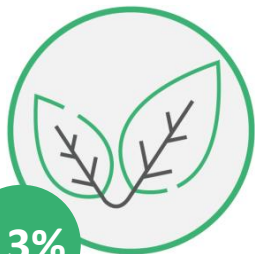


Some Poles mention environment and sustainability area as the one under influence of COVID-19. However, their opinion on this subject are often contradictory.

Q6b. Why do you think that /-Display answer Q6-/ is the area that will be more impacted by the crisis?

Open-ended

Environment, sustainable
and responsible
consumption



13%

Have quoted this
dimension as one of
the most impacted



"Reduction of waste production by giving up unnecessary products"

«Because, sitting at home, we often notice how many things we have or we buy food too much. A lot of people also started to be interested in sorting garbage »

«People will wonder what they are buying»



"Increase in waste (disposable gloves and masks)"

«We will be covered in plastic waste even more by a pandemic. »

«The government lost everything and it was all about money, they only took care of their butts, and all these masks, sleeves and other means only destroy the environment»



"Dissemination of pro-ecological attitudes after a pandemic"

«People will perceive the world differently and will want to make the most of their time on earth»

«People will responsibly approach to caring for the environment. A clean environment with fewer illnesses»

«Because people will start to appreciate nature and responsible shopping more, without throwing money away in so-called „ mud. "»



"Reduction of pollution due to insolation"

«While the world stopped automatically there was less smog, pollution, animals started to come out, species of plants appeared that we have not seen for years»

«When we stayed at home and our cars in the garages, the air pollution decreased very much. It gives food for thought. »

«Decreased human activity reduces the ozone hole and the environment can improve"



#newnormal
in a few words



In a few words...

Despite the anticipation of the Polish authorities and the limited amount of victims, COVID-19 crisis has a strong impact on Poles. We live our lives in the shadow of the virus and have a high fear level of the virus (3 Poles out of 10 saying they are very afraid). Most of us feels concrete negative consequences of COVID-19 on our lives (57%), affecting especially the financial situation (47% declared their level of incomes has decreased the last 3 months).

And - according to a majority of respondents - life won't be the same after the crisis. These most pessimistic (1 Pole out of 6) saying that our lives will be radically different are few and despite that fear and the feeling the crisis will have a long-term impact their life, a lot of the Poles intend to go back to their habits, as fast as possible for 43% of them.

During the locked-down period, habits related to all the spheres of life (personal, professional, transports, consumption, etc) have been deeply shaken. Isolation and other health protection measures were adopted by almost everybody. The relationships were positively impacted (more time spent with children, more time to take news of one's relatives, etc.). The digital transformation of the society has accelerated due to the crisis with a raise of users of services related both to personal and professional spheres: telecomputing using online video platforms, social networks, entertainment platforms, etc.

However, some behaviours have been slowed down by the locked-down, esp.: dating, using public transports and travel, etc. But there are some less intuitive, obvious areas of Poles lives which could have been boosted by this period: doing sport and taking more care of one's health, changing diet, using collaborative local platforms or sharing one's personal data to improve the collective organization.

What about the next months?



In a few words...

All the areas investigated show clear trends. Some pre-existing to COVID-19 or accelerated by the crisis, others – emerging and revealed by the situation.

Relationships and more generally the idea of “going back to essential & simplicity” is a good example of the emerging trend revealed by the crisis. The experience of the last months, when we were hungry for news of the family, spent a lot of time with children and/ or one’s partner have serious chance to maintain ,as the majority of Poles intend to continue it the future. Reading books and taking time to cook at home are also representation of the idea of “back to essential” trend, which was strengthen by the crisis and which should be continued in the future.

In the professional area, working from home and using online video platforms to work were skyrocketed because of the isolation and a 1 out of 4 working Poles would definitely like to do it in the future. These are an example of a pre-existing trend, which was accelerated by the crisis and linked with the digital transformation. Other examples of this pre-existing trend are: usage of online streaming platforms, eCommerce (esp. for non grocery goods) and online banking service which meet a huge success (27% of Poles used these services more in the past 3 months and 59% intend to use it in the future).

On the contrary, the ecology and responsible consumption suffered during the crisis. For example, the idea of paying more to purchase “made in Poland” products or services seems to be a temporary behaviour (31% did it more and 23% willing to continue in the future). The attention paid to one’s wastes (limiting and sorting trashes) is the only ecological aspect which increased and will continue to progress (53% definitely intend to do it).



“opinionway

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