

PLEASE WEAR A
FACE MASK

THREE COUNTRIES; THREE APPROACHES TO COVID-19 PRECAUTION



We've all found ourselves away from our home and our toothbrush, but wishing we had better breath. Maybe you chewed gum, maybe you just kept a good distance from others. In ancient Japan, preventing the spread of bad breath at religious rituals and festivals was the original impetus for covering the mouth with paper or leaves. Paper then turned to cloth, and over hundreds of years this practice morphed into one primarily used to prevent the spread of sickness and disease. In modern times, masks have been commonplace in Japan during cold and flu season, and the prominence of masks is credited by some as a contributing factor for Japan being largely spared from the SARS pandemic (zero fatalities).



A patient at a medical clinic is seen wearing a mask in this Japanese woodblock print from the Edo Period (1603-1868)

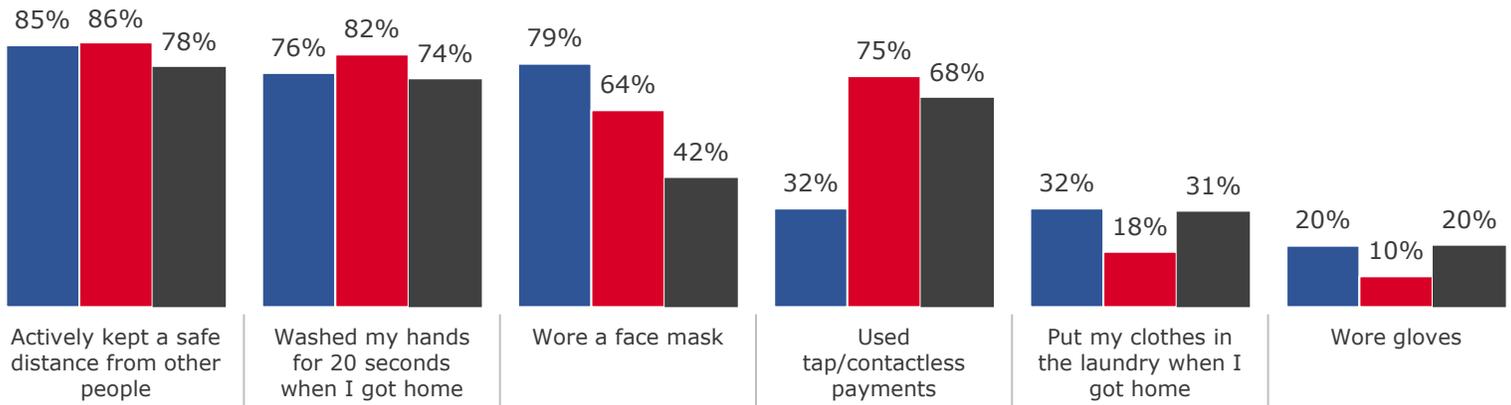
Mask-wearing spread from Japan to other Asian nations in 2003 during SARS, however the practice never became commonplace in the Western world. But COVID-19 has brought mask-wearing and several other hygiene practices to the forefront, and masks have become common in areas of the world where they have never before been worn outside of hospitals

But mask-wearing has not been accepted by everybody, and has become a politically-charged topic in the United States, Canada, the UK, and other countries.

Clearly, mask-wearing has not been entirely embraced in the West; masks have been rejected by some, and are thought of as a necessary burden by many others. BUT, despite this, masks have become a very common sight throughout much of the Western world. As part of our ongoing study tracking consumer attitudes, emotions, and behaviors during COVID-19, we set out to understand how mask-wearing and other practices have been embraced (or not) in the United States, Canada, and the UK.

ACTIONS TAKEN WHEN GOING OUT INTO PUBLIC

All the time + Most of the time



We found that while those in all three countries are taking meaningful steps to keep themselves and society protected from COVID-19, each country is approaching things a little bit differently.

- Most people in all three countries are actively keeping a safe distance from others and washing their hands upon arriving at their destination, though Canadians are slightly more likely to be doing both.
- Most in all three countries are washing their hands vigorously upon arriving at their destination, however the rate is slightly higher in the US.
- Wearing face masks is highest in the US (79% do so 'all the time' or 'most of the time'), followed by Canada (64%), and followed distantly by the UK (42%).
- Contactless payments are very common in Canada and the UK, but significantly less common in the US.
- Canadians are less likely than those in the US or UK to wash their clothes when getting home, or to wear gloves into public (though neither are extremely common actions in any of the three countries).

FREQUENCY OF MASK-WEARING

	US	Canada	UK
I will wear a mask when out in public at all times	58%	45%	27%
I will do my best to wear one as much as possible	16%	22%	28%
I will try, but if I forget I would still go about my business	5%	5%	7%
Only if mandated by the place I am entering	12%	20%	22%
No - under no circumstances	4%	5%	8%
I will not go out at all	5%	3%	8%

When asked specifically about masks, the majority of those in all three countries indicated they lean towards wearing a mask, however those in Canada, and especially in the UK are much less strict about this practice.

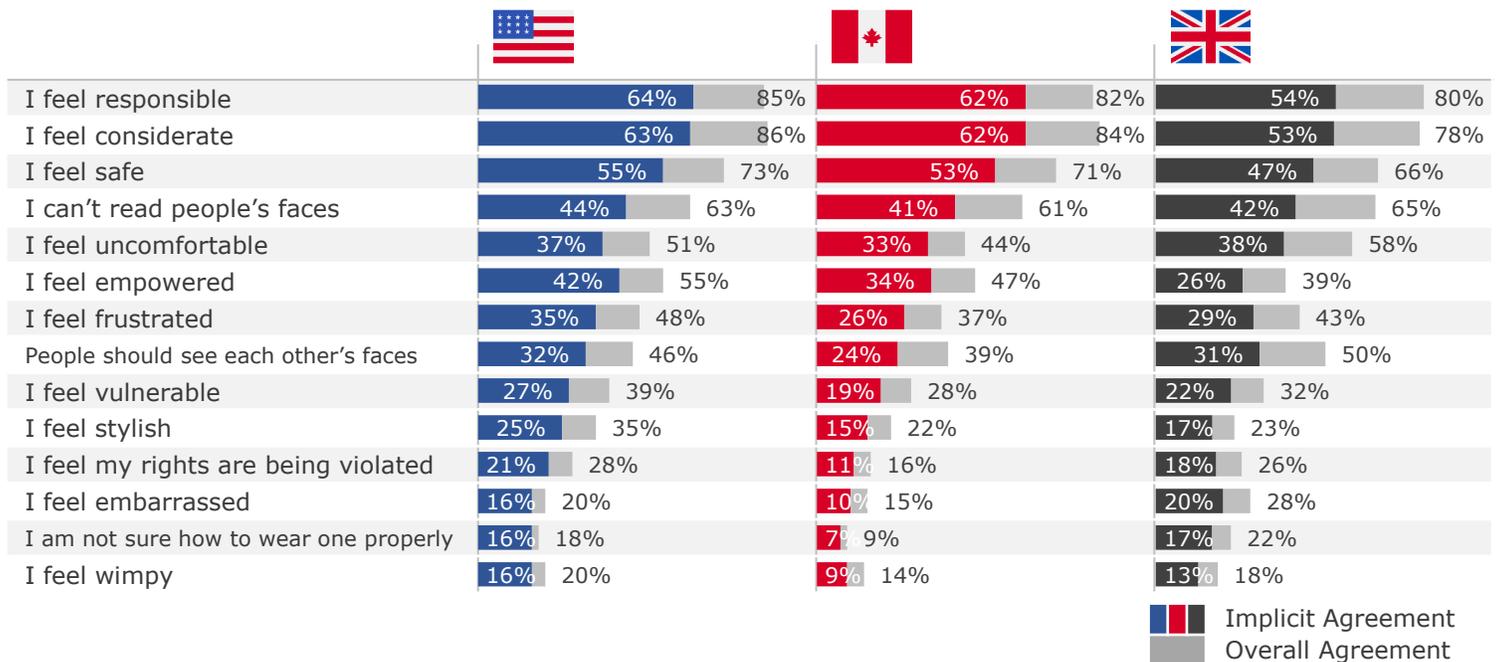
In the US, 74% either wear a mask all the time or do their best to wear one as much as possible in public, vs. 67% in Canada and just 55% in the UK.

On the other hand, 30% in the UK say they never wear a mask or only do so when mandated to, vs. 25% in Canada and just 16% in the US.

HOW DO PEOPLE FEEL ABOUT WEARING MASKS?

Mask-wearing is a complex issue in Western nations, and one that is wrought with sometimes-strong emotions. Mask-wearing has become controversial not only because of what people THINK about masks, but also because of how people FEEL about masks. They are new. They are strange. They are uncomfortable. And yet, they make us feel safe.

In order to understand what mask-wearing means to those in the US, Canada, and the UK, and to understand why it is so controversial, we employed Maru/Matchbox’s **Implicit Association Test** (IAT) methodology. IAT helps to measure not only how one thinks or feels, but how deeply-seated or emotional that attitude is:



We found that Americans overall are just more emotional about masks – both the positive elements, and the negative elements. Americans feel more *responsible* when wearing masks, but also more *wimpy* (though this is a lower emotion in all three countries). They feel more *safe*, but also more *frustrated*. One-third of Americans say they feel *stylish* wearing a mask (one-quarter feel this implicitly).

When comparing how each country feels, we can start to get a sense for how each country’s mask-wearing behaviors have diverged somewhat from each other.

United States: Mask-wearing is more common in the United States, but at the same time more controversial; this is because we see more polarization in thoughts about masks among Americans. 85% feel *responsible* (64% implicitly), 86% feel *considerate* (63%), while 73% feel *safe* (55%). Though the freedom and rights have been a large reason for mask-related controversy, just 28% of Americans say they *feel their rights are being violated* (21% say this implicitly). Clearly in America, the positive feelings about masks far surpass the negative.

Canada: While most Canadians lean towards wearing a mask in public, Canadians overall are less-inclined than Americans to wear a mask. Attitudes are highly regional in Canada, but overall willingness to wear masks can largely be attributed to Canadians feeling largely *responsible* (82% overall, including 62% implicitly), *responsible* (84%, 62%), and *safe* (71%, 53%). Citizen rights is a far less prevalent issue in Canada with just 16% saying *I feel my rights are being violated* (11% implicitly), far lower than in either the US or UK.

United Kingdom: Of the three countries, mask-wearing is by far the lowest in the UK. Analysis shows that this is because, in comparison with Americans and Canadians, those in the UK feel more *embarrassed* and *uncomfortable* wearing masks, and also more likely to say they are *not sure how to wear one properly*. Those in the UK feel less *empowered*, *considerate*, or *responsible* when wearing masks, vs. Canadians and Americans. While positive feelings (*responsible*, *considerate*, *safe*) outnumber negative feelings about masks in the UK, the positive feelings are less widely-held, and the negative feelings (*uncomfortable*, *people should see each other's faces*) are more widely-held.

HOW DO MASK RULES IMPACT PROPENSITY TO DO BUSINESS IN DIFFERENT SECTORS?

Many jurisdictions within the United States, Canada, and the UK are mandating masks in indoor public places. But in places where such regulations are not in place, or when such regulations end, how would citizens feel about individual brands that mandate mask-wearing in their locations? We asked whether people would be more likely or less likely to do business with companies in various sectors, that mandated mask-wearing in their locations:

									
	More Likely	Less Likely	NET	More Likely	Less Likely	NET	More Likely	Less Likely	NET
Doctor's office	53%	15%	+38%	51%	17%	+34%	39%	0%	+39%
Grocery Store	55%	15%	+39%	50%	20%	+30%	41%	19%	+22%
Public transit	47%	24%	+23%	51%	20%	+31%	45%	25%	+20%
Retail (non-Grocery)	49%	19%	+31%	46%	22%	+24%	40%	22%	+18%
Bank Branch	49%	17%	+32%	43%	22%	+21%	37%	22%	+15%
Airline	49%	22%	+27%	44%	25%	+20%	40%	28%	+12%
Hotel (public spaces)	42%	22%	+19%	38%	27%	+12%	34%	25%	+9%
Restaurant	42%	22%	+21%	35%	30%	+6%	31%	33%	-3%
The Movies	42%	27%	+15%	36%	29%	+7%	31%	30%	+2%
Live entertainment	37%	29%	+8%	35%	31%	+3%	32%	32%	0%
Gym	42%	31%	+10%	36%	36%	-1%	30%	36%	-7%
AVERAGE	46%	22%	+24%	42%	25%	+17%	36%	25%	+11%

Results show that brands and businesses that require mask-wearing would largely be well-served by such regulations, with those saying it would make them more likely to do business far outnumbering those who say it would make them less likely. Mask policies

would have the highest positive impact on doing business with doctor’s offices, grocery stores, and public transit, while they would have the least positive impact (and in some cases, a negative impact) on propensity to do business with gyms, live entertainment companies, and movie theatres.

Results also show that the impact of brands imposing a mask-wearing policy would be significantly more positive in the United States (average of +24% impact, across 11 sectors tested), followed by Canada (+17%) and then the UK (+11%). By sector, the impact is most positive in the US for 9 of 11 sectors, with the impact being most positive in the UK for enforcing masks at a doctor’s office (+39%), and most positive in Canada when enforced on public transit (+31%).

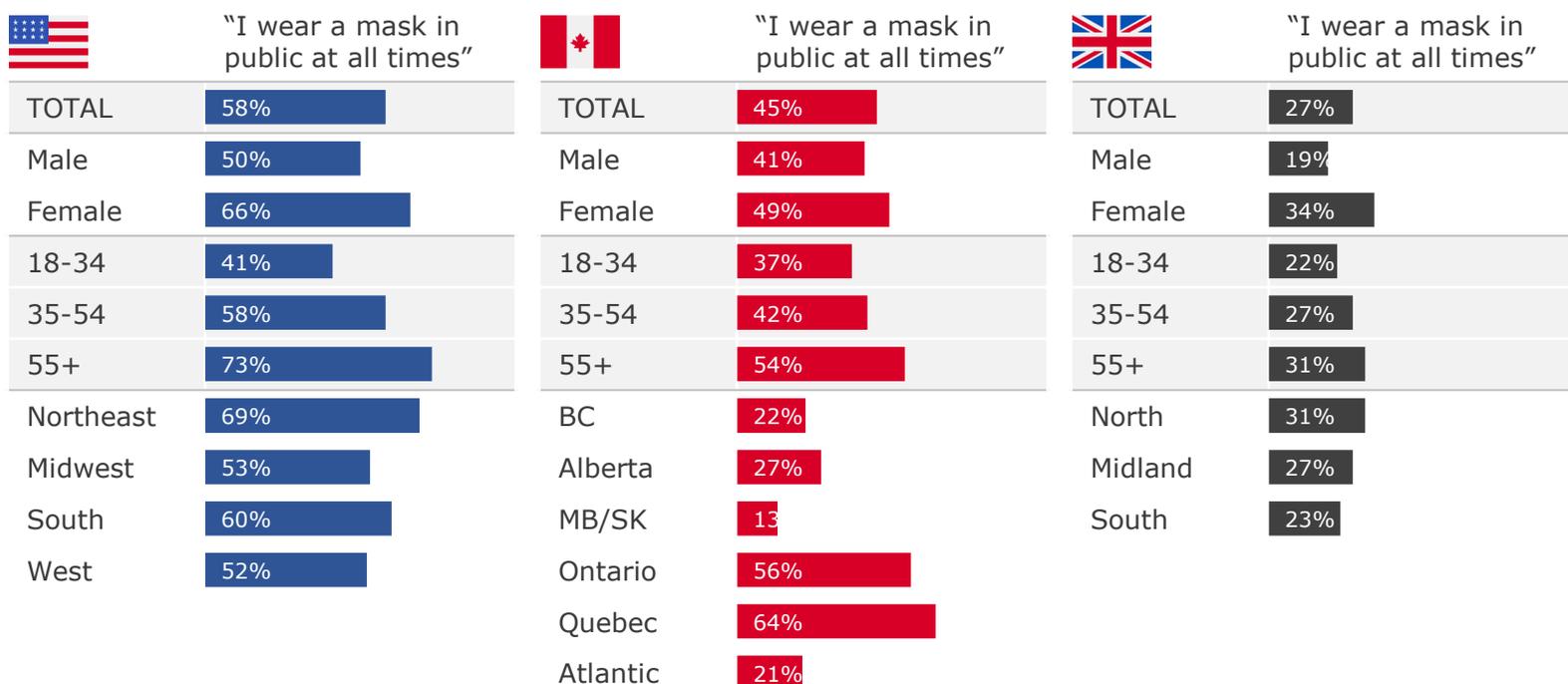
DEMOGRAPHIC AND REGIONAL DIFFERENCES

In addition to noticing meaningful differences in mask attitudes between countries, we have also identified meaningful differences by demographics:

Gender: In all three countries, women are significantly more likely than men to say they wear masks “in public at all times”.

Age: In all three countries, older demographics are more likely to wear masks than younger people. In the United States in particular, the relationship between age and mask-wearing is strong, with 73% of those 55+ wearing masks all the time in public, vs. just 58% among 35-54 year olds and 41% among 18-34 year olds.

Region: There are meaningful regional differences in all three countries, but most notably in Canada; Ontarians and Quebecers are more than twice as likely as any other province to always wear a mask in public. In the US, mask-wearing is most common in the Northeast, while masks are most common in the Northern region of the UK.



IS YOUR GOVERNMENT PROTECTING ITS CITIZENS?

			
The [US, Canadian, UK] government is doing a good job protecting citizens	46%	75%	55%
My [state's, province's, local] government is doing a good job protecting citizens	64%	82%	67%
Local > Federal NET	+18%	+7%	+12%

Satisfaction with the job government is doing protecting citizens is far higher in Canada, followed by UK and then the US. In each of the three countries, ratings of the job local (or state or province) government is doing are higher than ratings of the federal government's performance. Provincial government performance only surpasses federal government by 7% in Canada, while state governments receive 18% higher marks than federal government in the US.

KEY TAKEAWAYS

While the majority of people in the US, Canada, and the UK lean more towards wearing masks than not, there are significant differences between the countries which would have meaningful implications for companies and the policies they may put in place. Key findings include:

- While a vocal minority are making their presence and opinions known on social media, results found the vast majority of Americans are pro-mask – more so than in Canada, and much more so than in the UK.
- Women are more likely to “always wear a mask in public” than men, and older citizens are much more likely than younger citizens to lean heavily towards mask-wearing.
- The most common feelings about mask-wearing in all three countries are the feelings of being *responsible*, *considerate*, and *safe*, many citizens are struggling with a mixture of positive and negative feelings about mask-wearing:
 - In the US, one-in-five implicitly feel as though their rights are being violated (higher than 18% in the UK and 11% in Canada).
 - Many people (more than 40%) implicitly feel they cannot read people's faces.
 - More than one-third in each country implicitly feel *uncomfortable* when wearing a mask, while some also feel *embarrassed* or even *wimpy*.
- Despite the mixed feelings about wearing masks, results show that companies in most sectors would be well-served to have mask rules in place even if their jurisdiction does not; in general, more people say that a mask rule would make them MORE likely to do business with a brand vs. LESS likely.

Results are taken from Maru's ongoing, weekly tracker of key elements related to how consumers FEEL, BEHAVE, and THINK during the COVID-19 pandemic. For more information, please go to www.marureports.com/coronavirus, contact kyle.davies@marumatchbox.com, or reach out to your Maru representative.

Results in this report are taken from fielding on the following days:
 UK: July 17 (n=1,022 18+ respondents)
 Canada: July 21 (n=1,516 18+ respondents)
 US: July 21 (n=1,518 18+ respondents)