TNS Survey:  
*Public Perceptions of Bird Flu*

Mark Walton  
Regional Director  
Asia Pacific Access Panel

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In 2003, SARS hit the world hard, causing death and economic distress in many countries, most particularly in Asia.

Now, in 2005, with new outbreaks of bird flu announced around the world on a daily basis and policymakers on high alert, a new poll completed this week by TNS reveals a very high level of concern and pessimism in Asia about the potential consequences to public health, with many consumers in the region already having made changes to their dietary habits or travel plans as a direct result of the perceived threat.

The TNS flash poll of more than 2,500 Asians conducted on 25-26 October shows that more than 70 per cent in Hong Kong, Korea and Taiwan and more than half in China and Singapore believe that bird flu will be a serious problem within six months.

This paper gives a snapshot of the results of the survey, conducted on TNS’ 6thdimension Access Panels across the region. TNS may conduct a more detailed survey on bird flu later in the year, depending on the development of the epidemic.

For a more elaborate overview, or to find out more about 6thdimension access panels, please do not hesitate to contact Mark Walton at mark.walton@tns-global.com or +852 2116 4052
Bird Flu is expected to become a serious problem shortly …

How long do you expect it to take for the Bird Flu outbreak to become a real problem in your country?

<table>
<thead>
<tr>
<th>Country</th>
<th>It is a real problem within 6 months</th>
<th>It is a real problem longer than 6 months</th>
<th>It will never be a real problem</th>
<th>Don't know/ No opinion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Korea</td>
<td>74%</td>
<td>11%</td>
<td>6%</td>
<td>9%</td>
</tr>
<tr>
<td>Taiwan</td>
<td>74%</td>
<td>4%</td>
<td>8%</td>
<td>14%</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>71%</td>
<td>9%</td>
<td>9%</td>
<td>11%</td>
</tr>
<tr>
<td>China</td>
<td>55%</td>
<td>10%</td>
<td>24%</td>
<td>10%</td>
</tr>
<tr>
<td>Singapore</td>
<td>51%</td>
<td>15%</td>
<td>11%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Base: Total number of respondents heard of Bird Flu or Avian Flu n=2527

Source: Q5
... and could lead to a pandemic amongst humans

How much do you agree or disagree with each of the following statements?

Bird Flu could lead to a pandemic amongst humans, that is, it could be transmitted from one human to another.

<table>
<thead>
<tr>
<th>Region</th>
<th>Strongly Agree or Slightly Agree</th>
<th>Neither Agree nor Disagree</th>
<th>Strongly Disagree or Slightly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taiwan</td>
<td>76%</td>
<td>13%</td>
<td>11%</td>
</tr>
<tr>
<td>Singapore</td>
<td>74%</td>
<td>17%</td>
<td>9%</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>68%</td>
<td>19%</td>
<td>13%</td>
</tr>
<tr>
<td>Korea</td>
<td>55%</td>
<td>23%</td>
<td>22%</td>
</tr>
<tr>
<td>China</td>
<td>47%</td>
<td>16%</td>
<td>38%</td>
</tr>
</tbody>
</table>

Base: Total number of respondents heard of Bird Flu or Avian Flu n=2527

Source: Q8
Consumers reacted already by eating less poultry…

Which of the following statements applies to you and Bird Flu?

I have chosen to eat less poultry

Base: Total number of respondents aware of Bird Flu or Avian Flu n=511 in China, n=510 in Hong Kong, n=511 in Taiwan, n=512 in Singapore, n=483 in Korea

Source: Q7
.... and are changing travel plans

**Q** Which of the following statements applies to you and Bird Flu?

I have already changed my travel plans because of concerns about Bird Flu

![Bar Chart]

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taiwan</td>
<td>22%</td>
</tr>
<tr>
<td>Singapore</td>
<td>19%</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>16%</td>
</tr>
<tr>
<td>China</td>
<td>14%</td>
</tr>
<tr>
<td>Korea</td>
<td>6%</td>
</tr>
</tbody>
</table>

Base: Total number of respondents aware of Bird Flu or Avian Flu
n=511 in China, n=510 in Hong Kong, n=511 in Taiwan, n=512 in Singapore, n=483 in Korea

Source: Q7
There is dissatisfaction with Government handling of Bird Flu

How well do you feel the Government has handled the Bird Flu outbreak?

Singapore: 24% Very well, 62% Adequately, 7% Inadequately, 1% Poorly, 1% Don't know

Hong Kong: 3% Very well, 44% Adequately, 39% Inadequately, 9% Poorly, 5% Don't know

Korea: 1% Very well, 23% Adequately, 46% Inadequately, 21% Poorly, 9% Don't know

Taiwan: 5% Very well, 15% Adequately, 51% Inadequately, 25% Poorly, 5% Don't know

Base: Total number of respondents heard of Bird Flu or Avian Flu in Hong Kong, Taiwan, Korea and Singapore n=2016

Source: Q8a
But governments are better prepared after SARS

Do you think the government is more or less capable today of handling another flu crisis compared with during the SARS period in 2003?

问题：从2003年的非典型肺炎爆发的经验，您认为政府比以往有更多或更少的能力去应付另一次流感危急？

<table>
<thead>
<tr>
<th></th>
<th>More Capable</th>
<th>Same Capability</th>
<th>Less Capable</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hong Kong</td>
<td>64%</td>
<td>25%</td>
<td>2%</td>
<td>9%</td>
</tr>
<tr>
<td>Singapore</td>
<td>72%</td>
<td>22%</td>
<td>3%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Base: Total number of respondents heard of Bird Flu or Avian Flu in Hong Kong and Singapore  n=1022
Source: Q8a
The public wants vaccinations (if available)

How much do you agree or disagree with the following statements?

The Government should vaccinate all of the population as a precaution against Bird Flu

<table>
<thead>
<tr>
<th>Country</th>
<th>Strongly Agree or Slightly Agree</th>
<th>Neither Agree nor Disagree</th>
<th>Strongly Disagree or Slightly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taiwan</td>
<td>65%</td>
<td>25%</td>
<td>10%</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>63%</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>Singapore</td>
<td>60%</td>
<td>23%</td>
<td>17%</td>
</tr>
<tr>
<td>Korea</td>
<td>59%</td>
<td>28%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Base: Total number of respondents heard of Bird Flu or Avian Flu in Hong Kong, Taiwan, Korea and Singapore
n=2016
Source: Q8b
And poultry imports to be banned

How much do you agree or disagree with the following statements?

We should ban imports of birds from other countries as a precaution

<table>
<thead>
<tr>
<th>Country</th>
<th>Strongly Agree or Slightly Agree</th>
<th>Neither Agree nor Disagree</th>
<th>Strongly Disagree or Slightly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taiwan</td>
<td>82%</td>
<td>11%</td>
<td>7%</td>
</tr>
<tr>
<td>Korea</td>
<td>69%</td>
<td>21%</td>
<td>10%</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>58%</td>
<td>22%</td>
<td>20%</td>
</tr>
<tr>
<td>Singapore</td>
<td>50%</td>
<td>26%</td>
<td>24%</td>
</tr>
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Base: Total number of respondents heard of Bird Flu or Avian Flu in Hong Kong, Taiwan, Korea and Singapore
n=2016
Source: Q8b
And perhaps even borders to be closed

<table>
<thead>
<tr>
<th>Country</th>
<th>Strongly Agree or Slightly Agree</th>
<th>Neither Agree nor Disagree</th>
<th>Strongly Disagree or Slightly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Korea</td>
<td>45%</td>
<td>28%</td>
<td>27%</td>
</tr>
<tr>
<td>Singapore</td>
<td>42%</td>
<td>30%</td>
<td>28%</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>37%</td>
<td>19%</td>
<td>44%</td>
</tr>
<tr>
<td>Taiwan</td>
<td>24%</td>
<td>25%</td>
<td>51%</td>
</tr>
</tbody>
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n=2016

Source: Q8b
CONCLUSION

- This survey confirms that the bird flu threat is top of mind for Asians all across the region, and uncovers a growing impatience and sense of urgency around the issue especially in Hong Kong, Korea and Taiwan.

- The public are already changing their behaviour, in eating and travel.

- They expect the authorities to act decisively.

- While the appropriate steps to combat bird flu are still being evaluated, policymakers must also place careful consideration as to how to placate an increasingly alarmed public and provide reassurance that the situation is under control.

- The next slides outline the study design and timing involved.
Research Method: On-line Access Panels

- TNS’ 6thdimension Access Panel were used for this study

- An Access Panel is a group of individuals who have agreed (opted in) to participate in market research surveys

- Interviewing is therefore by ‘permission’ rather than ‘interruption’

- 6thdimension panels are tightly managed to ensure maximum quality and response rates.

For more information on TNS 6thdimension Access Panel, please contact Mark Walton at mark.walton@tns-global.com
Chronology

Monday (Oct 24th)
- 10 am: Decision to run Bird Flu poll
- 12 pm: Questionnaire designed
- 4 pm: Online study ready
- 7 pm: Pilot in 3 countries

Tuesday (Oct 25th)
- 10 am: Survey launched in HK, CH, SP
- 2 pm: Survey launched in TW
- 5 pm: Survey launched in KR

Wednesday (Oct 26th)
- Surveys in field

Thursday (Oct 27th)
- 9 am: Survey completed
- 10 am: Final results
- 1 pm: Media releases ready
- 3 pm: HK media conference

Surveys in field

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TNS 6th dimension network of on-line panels

- **Australia and New Zealand** available since 2002
- **Taiwan** available since early 2005
- **Hong Kong** launched April
- **Korea** launched April
- **Singapore** launched August
- **China** launched September
- **Japan** panel available via TNS-NRC
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