



COVID-19 U.S. CONSUMER IMPACT TRACKING STUDY – WEEK 7

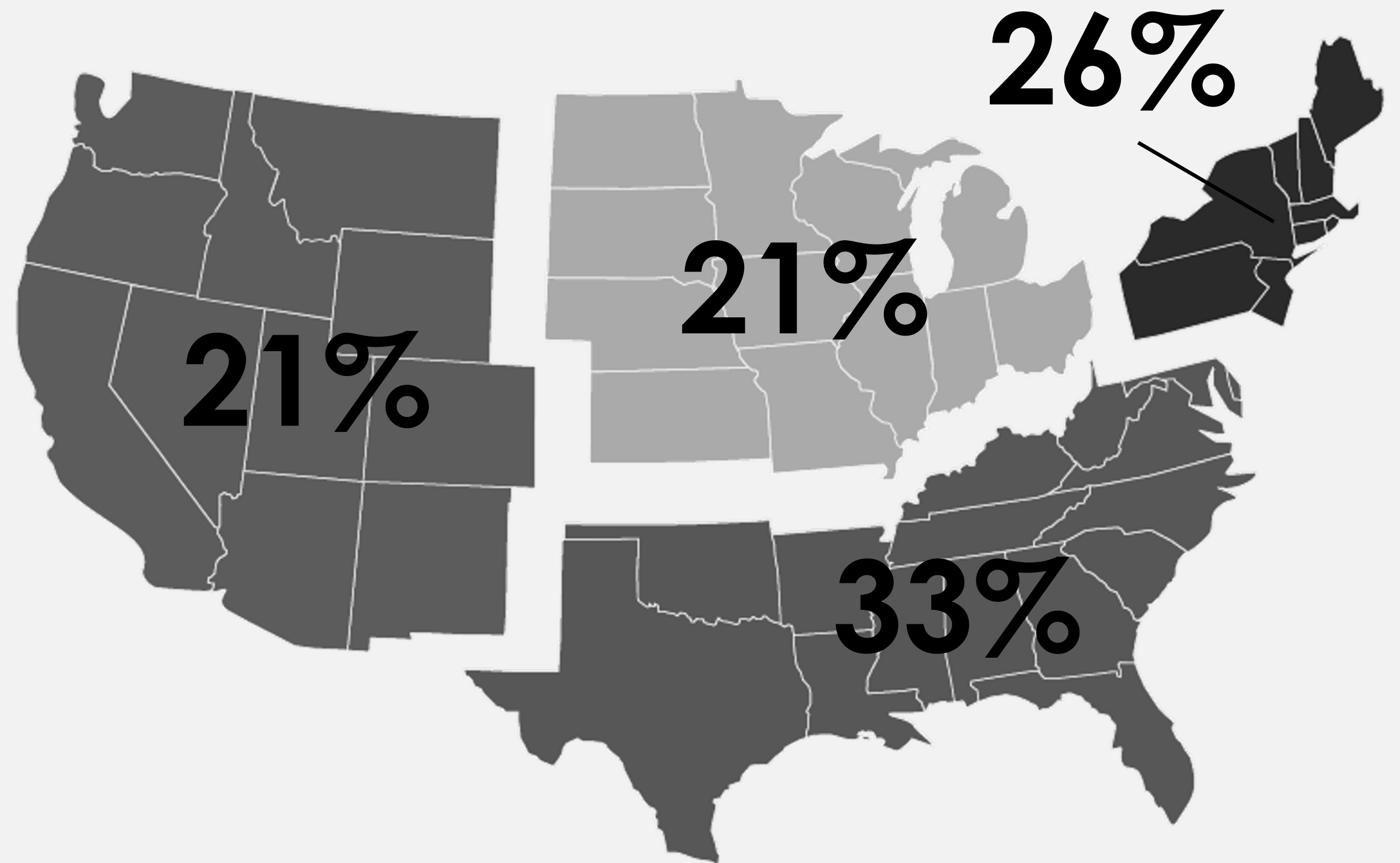
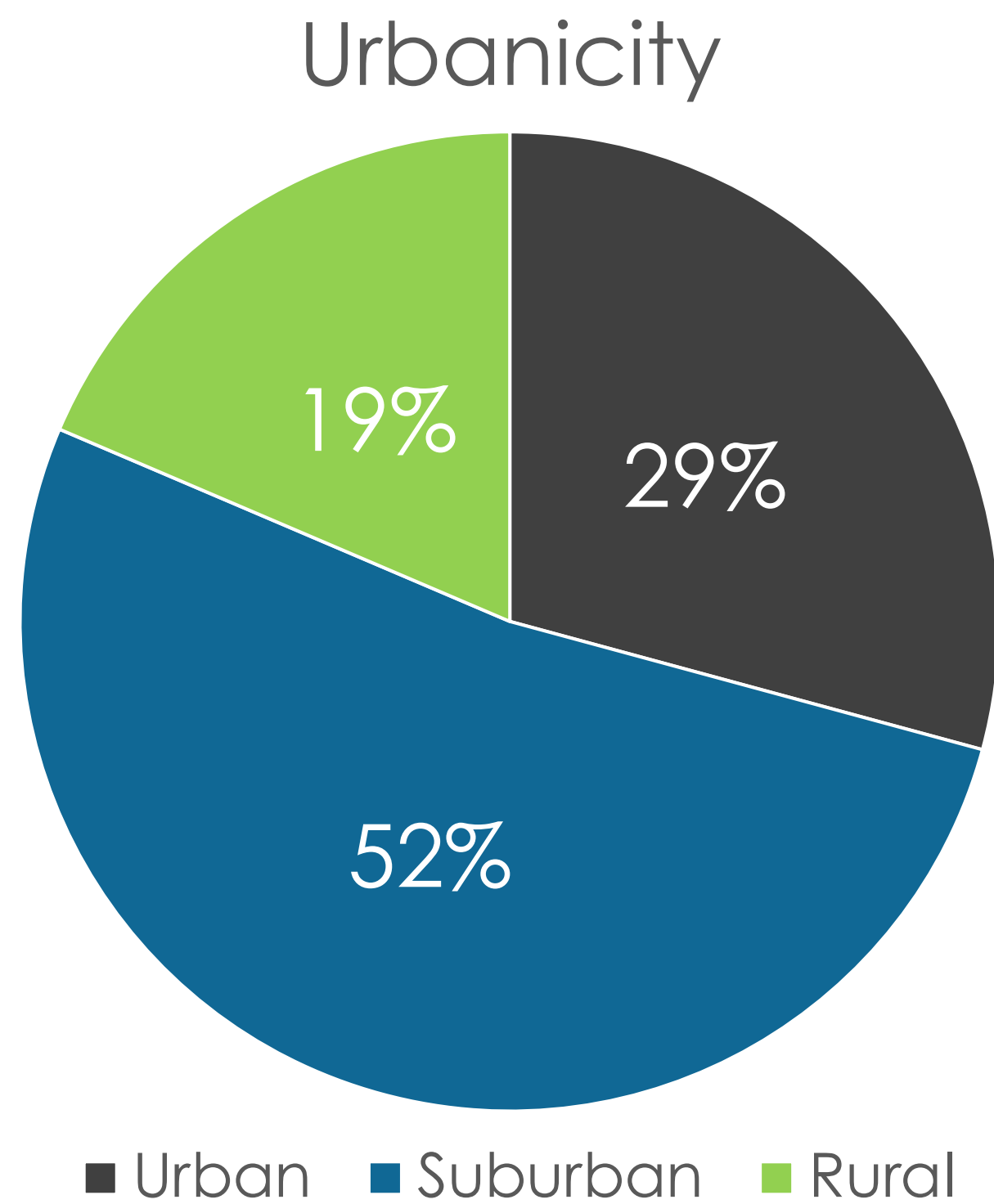
PRESENTED APRIL 20, 2020

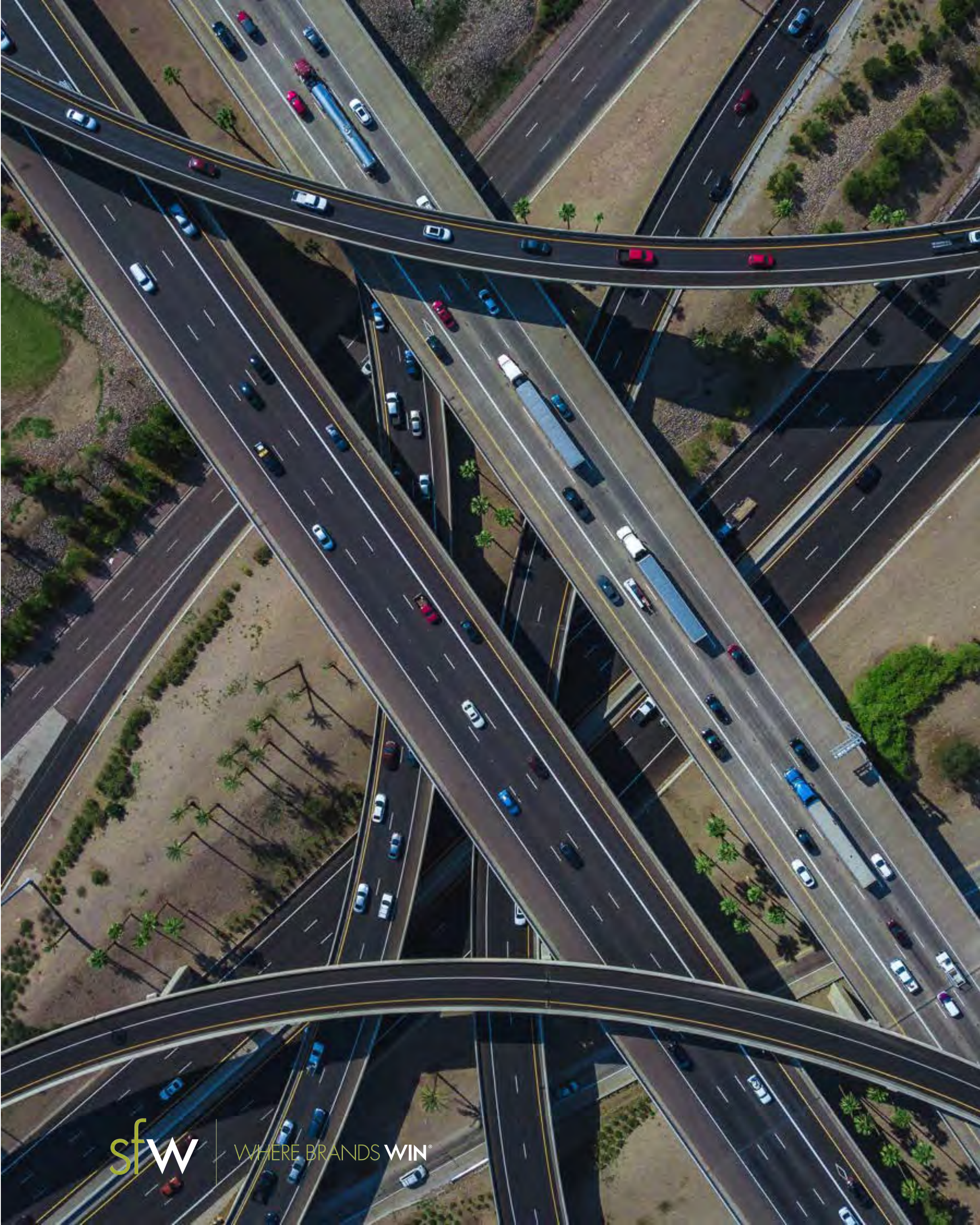
Methodology

- N = 1,109; Census Balanced
- MOE = $\pm 2.94\%$
- Panel: General Population
- Collected: 04/17/20, 04/18/20

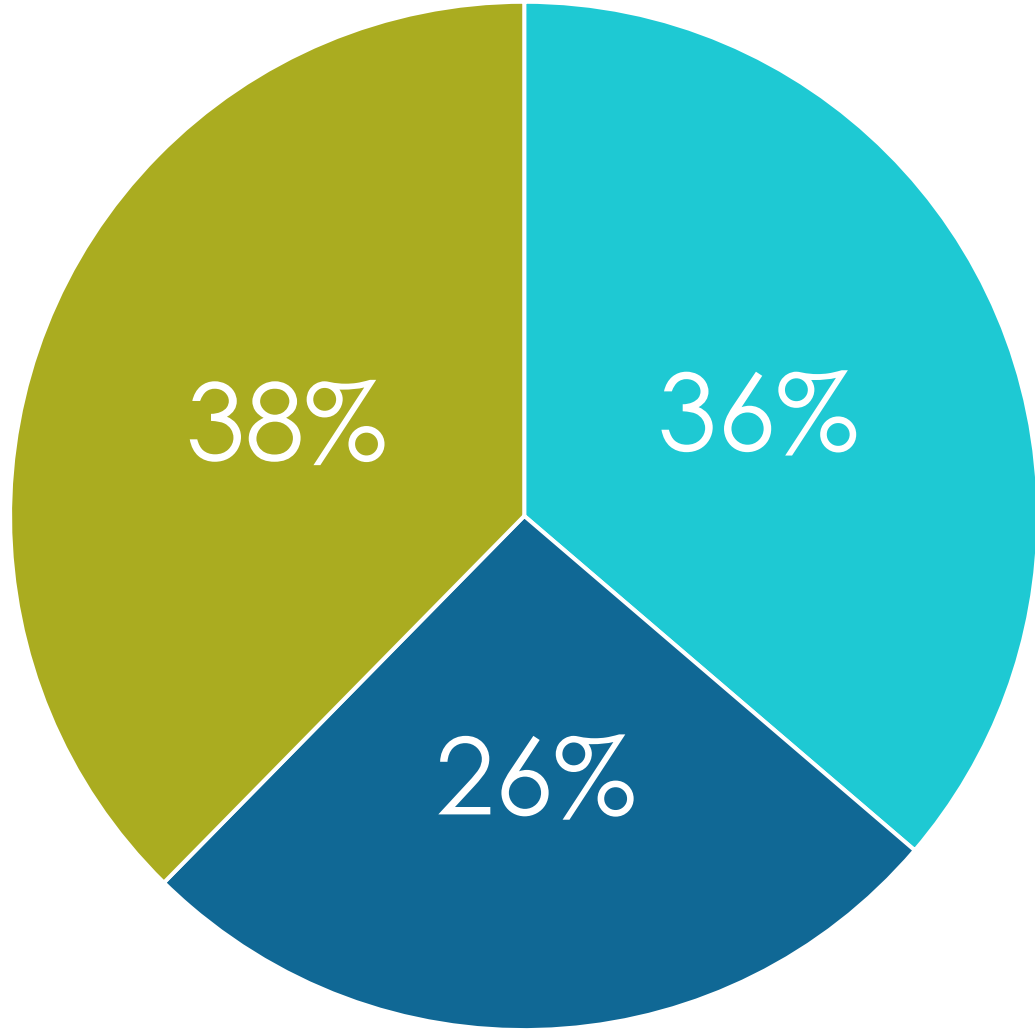


Census Balanced Panel is Representative of America



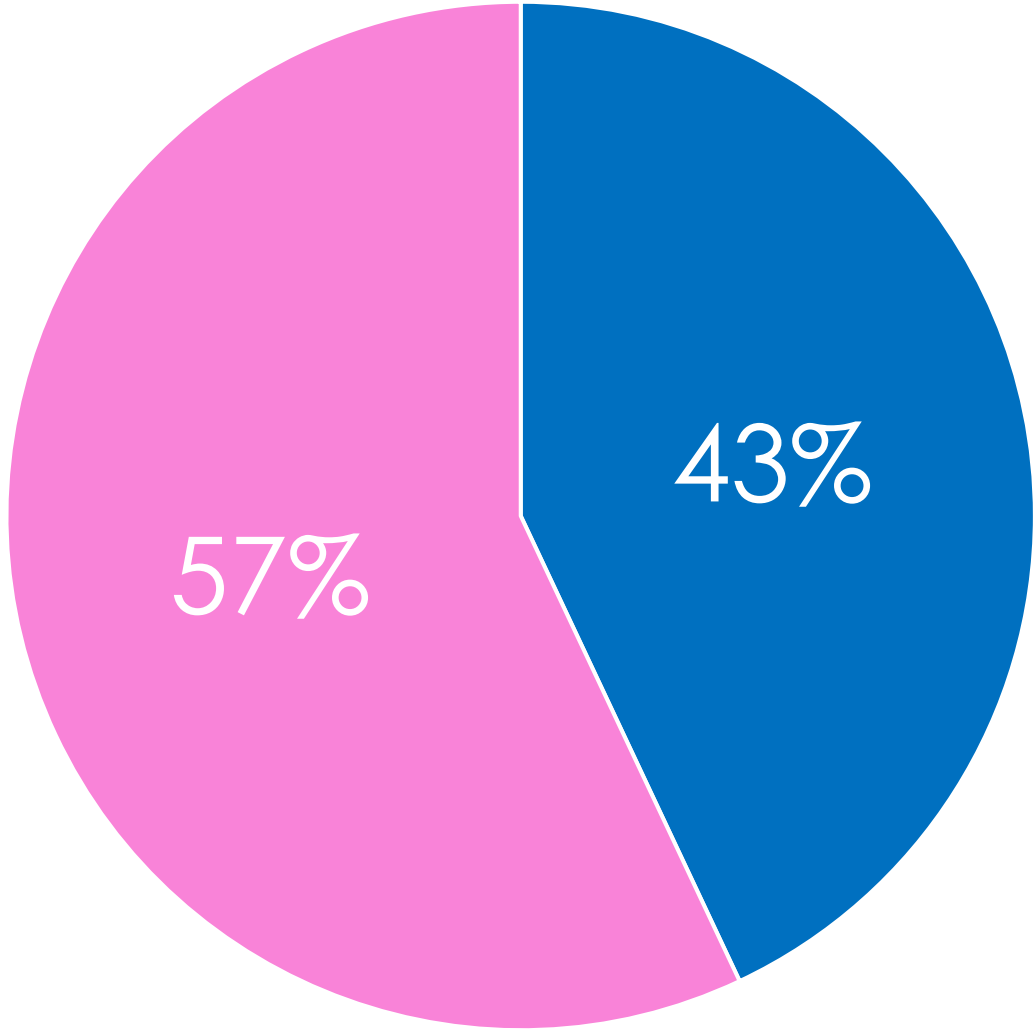


Generation



■ Millennial ■ Gen X ■ Boomer

Gender



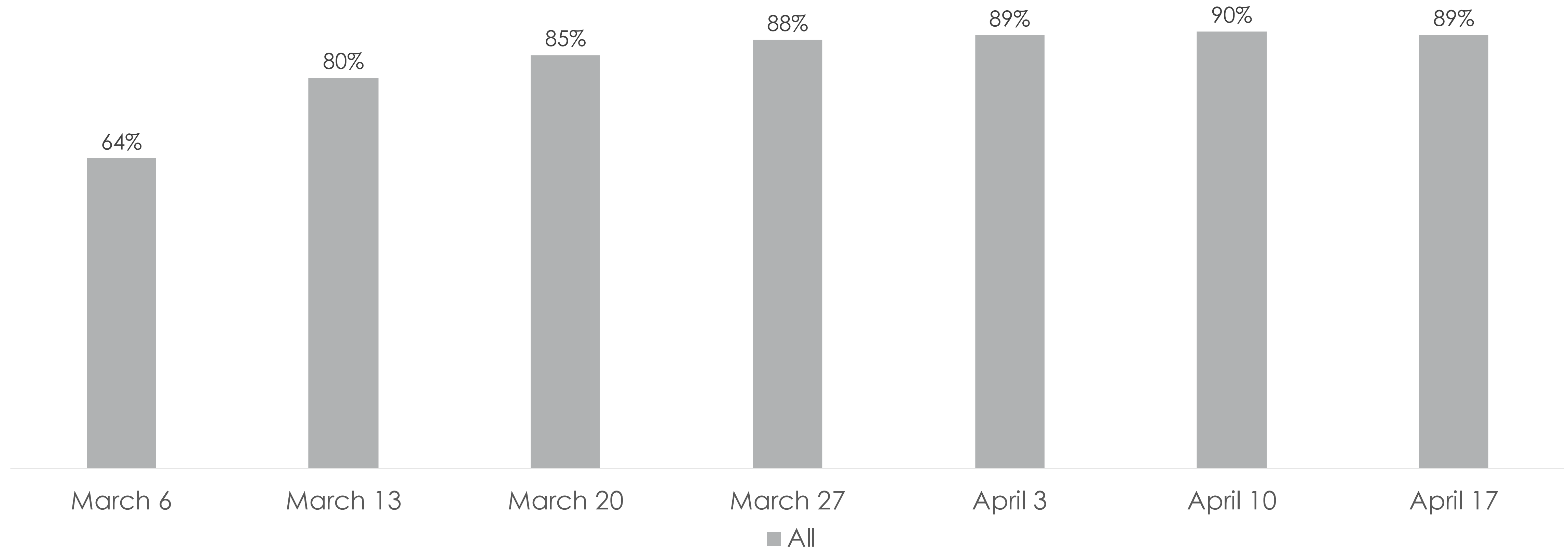
■ Male ■ Female

COVID-19 Status

STAY
HOME

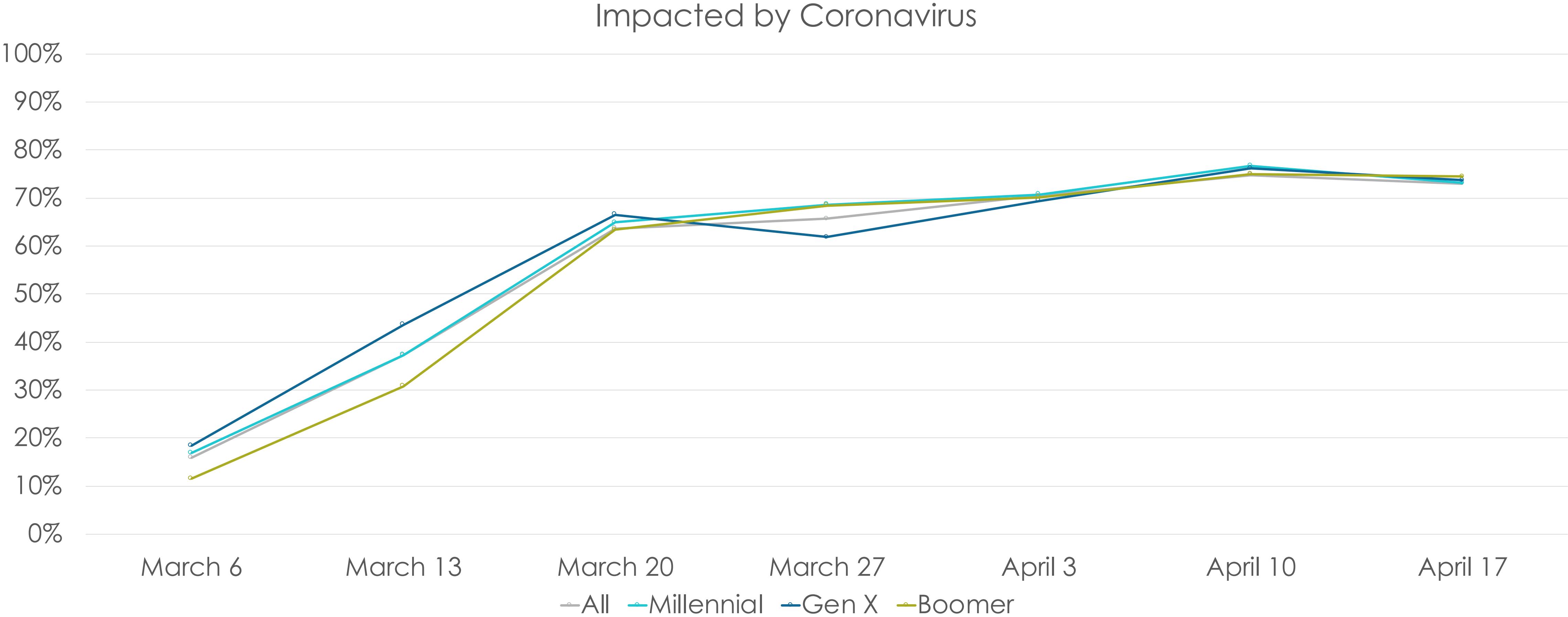
Familiarity has remained unchanged for 4 weeks.

Familiarity with Coronavirus



How familiar are you with the Coronavirus (COVID-19)?

Those impacted by the Coronavirus have leveled off at about 75%.

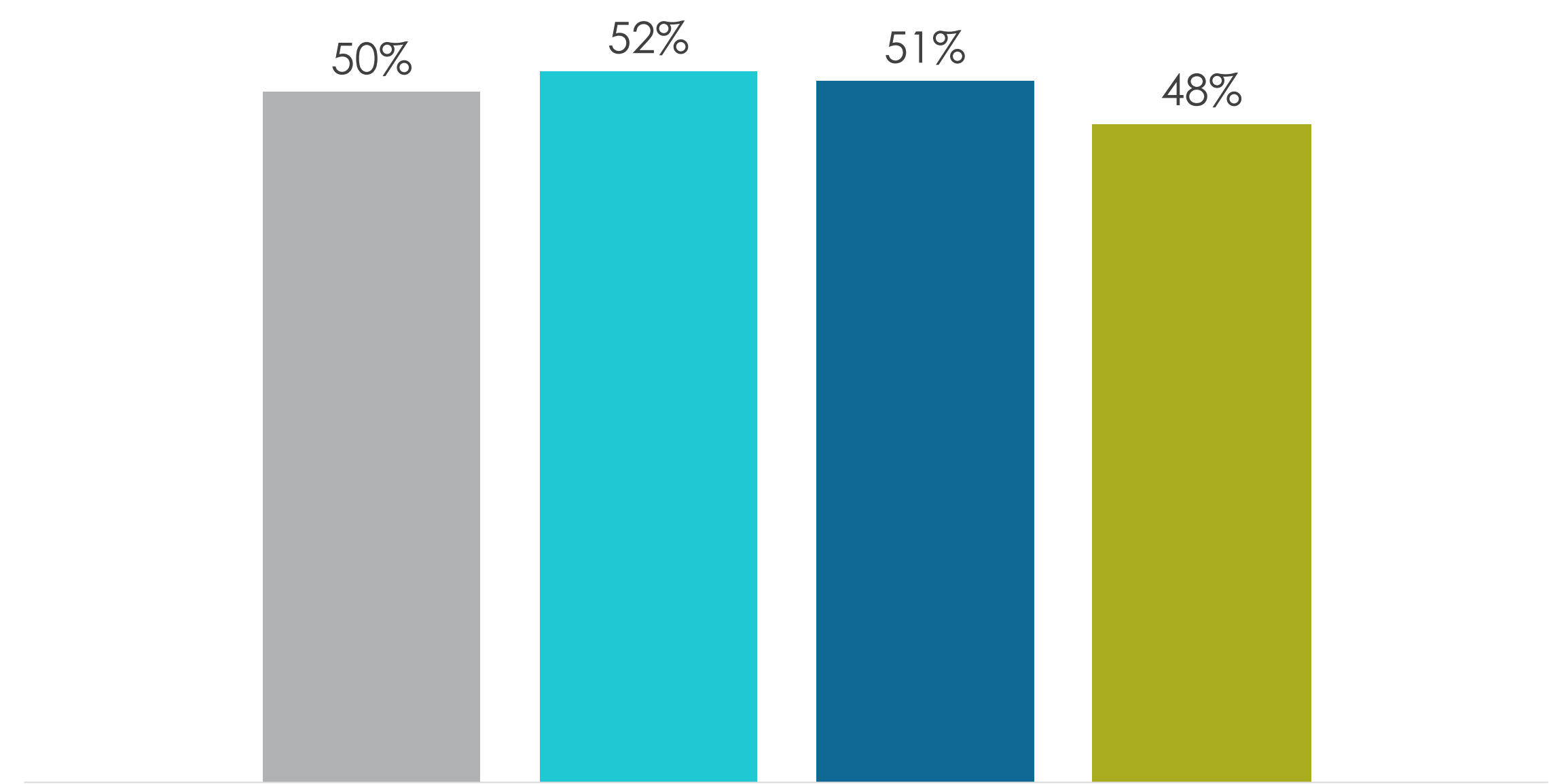


Have you been impacted by the Coronavirus?



Half of the respondents that are working are in essential industries where they must report to work.

Essential workers



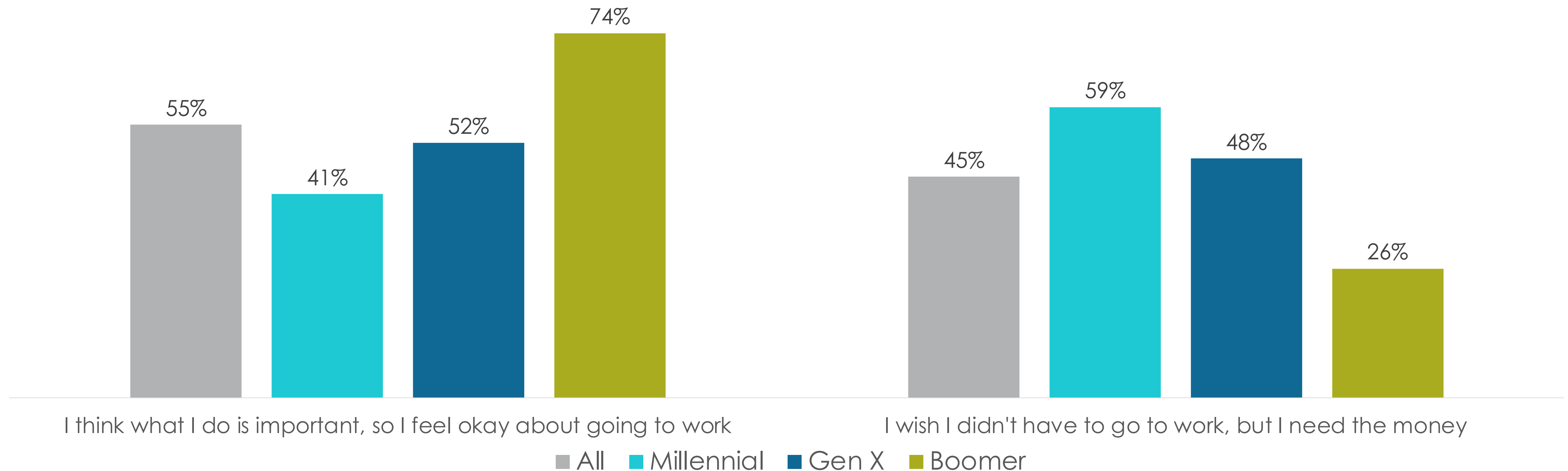
Yes

■ All ■ Millennial ■ Gen X ■ Boomer

Do you work in a business that is identified as essential and have to go to work?

A slight majority (55%) of those who must report to work feel okay about it because they think what they do is important.

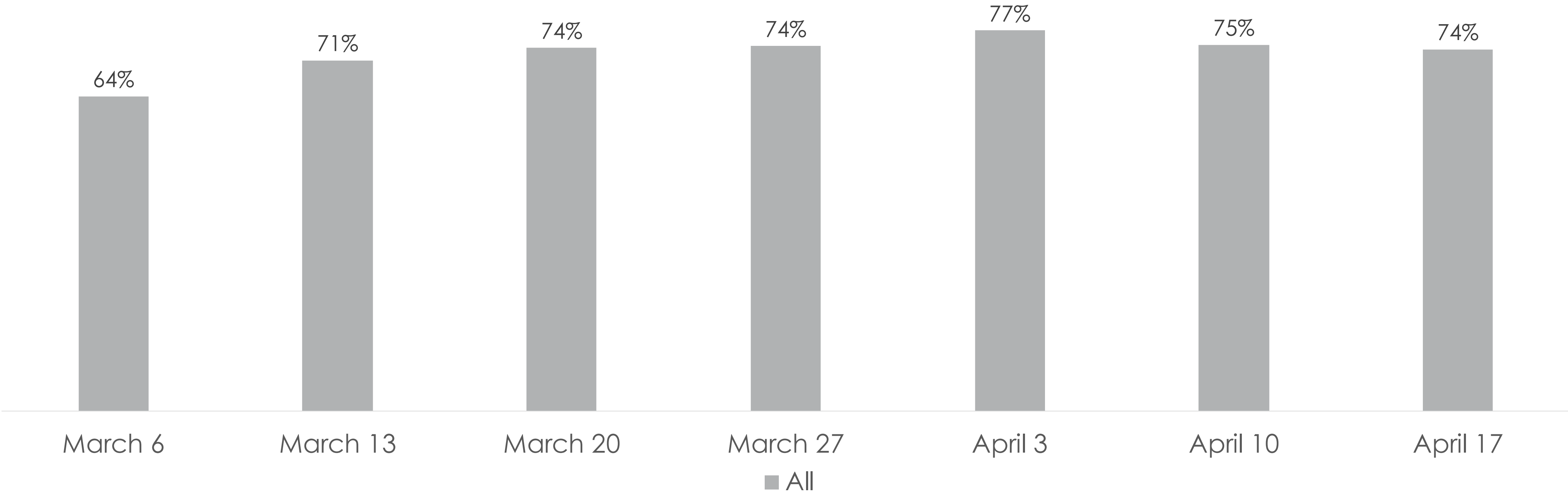
Essential workers' feelings about work



Which of the following best describes how you feel about going to work?

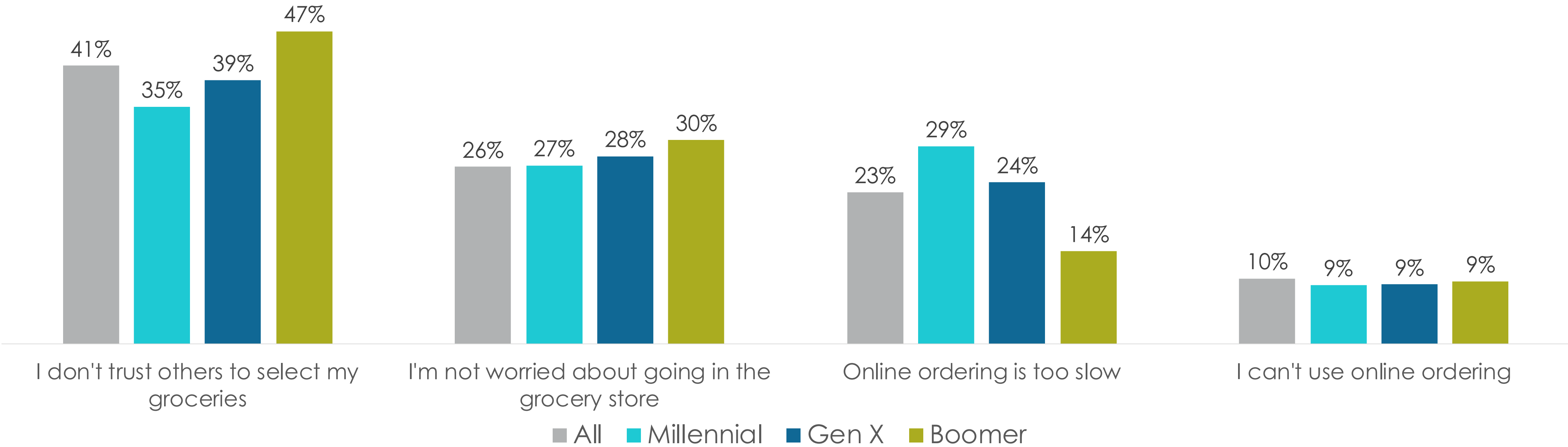
Three-quarters of respondents feel confident the precautions they're taking will help keep them safe.

Confident in extra precautions taken



That confidence may be misplaced. Of the 89% of people who are still going into the grocery store to shop, 26% aren't worried about being there.

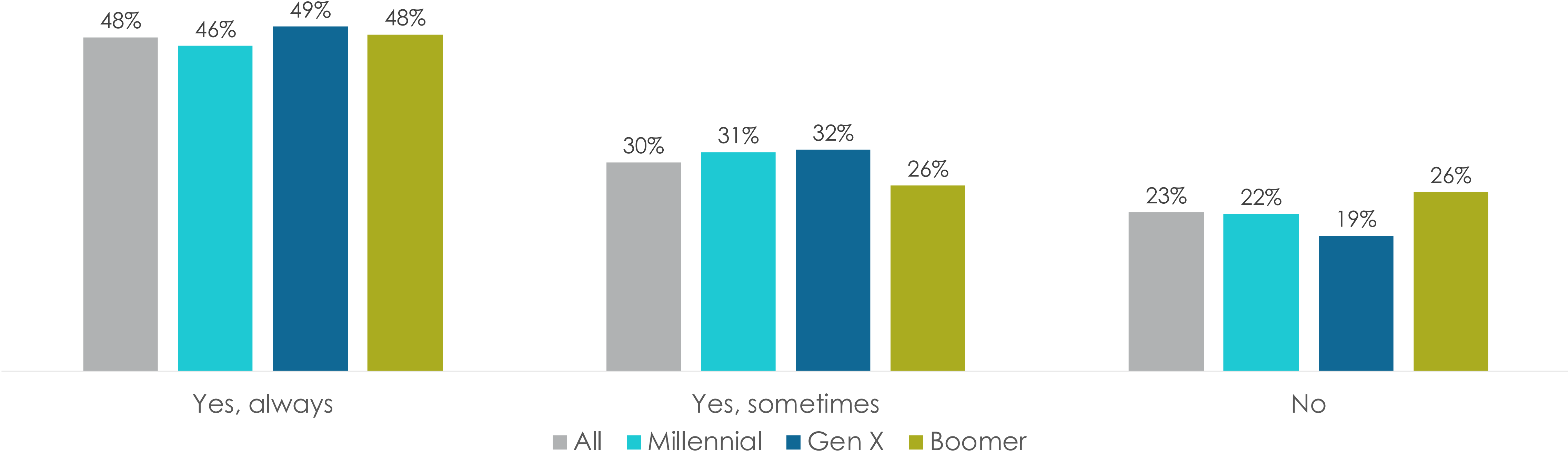
Reason for continuing to go to the grocery store rather than ordering online



Which of the following best describes why you continue to go into the grocery store rather than using online ordering?

And, despite the recommendations of the CDC and others, only 48% are wearing a mask whenever they must go out in public.

Wearing masks in public



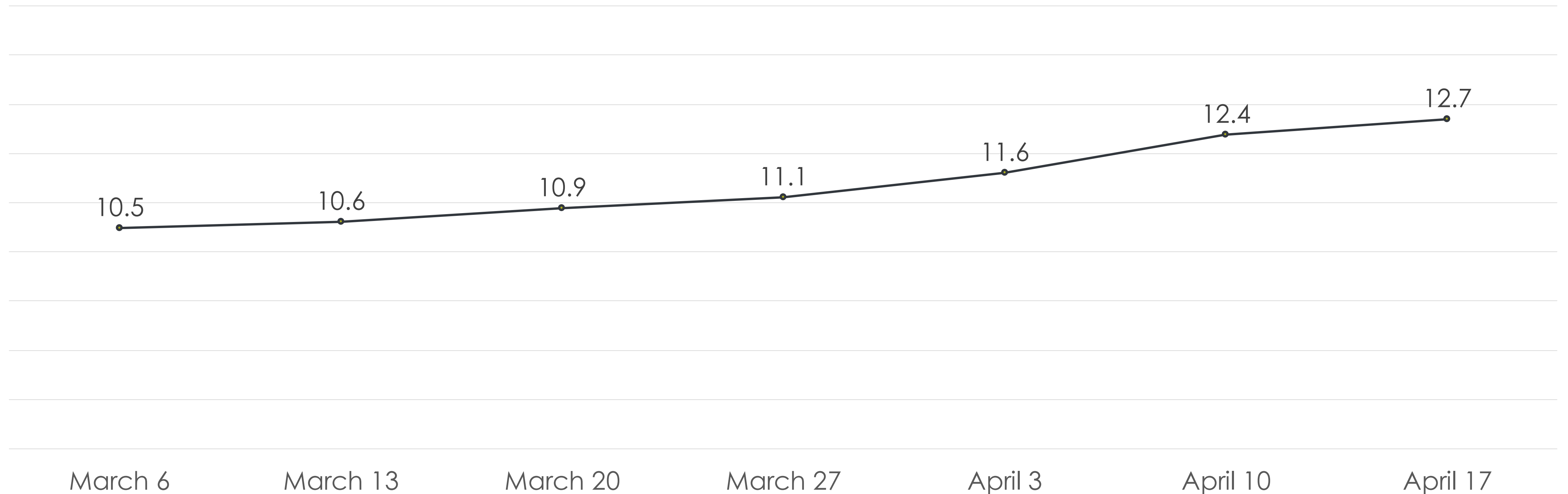
Do you wear a mask when you have to go out in public?

A photograph of two men in suits fist-bumping in a crowd. The man on the left is older with grey hair, wearing a dark suit. The man on the right is also older with grey hair and glasses, wearing a grey suit over a blue shirt and tie. They are both smiling. In the background, other people are visible, including a woman with blonde hair on the right. The scene appears to be indoors, possibly at a formal event or conference.

Returning to normalcy

People are increasingly less confident that a quick fix will come in the form of a vaccine.

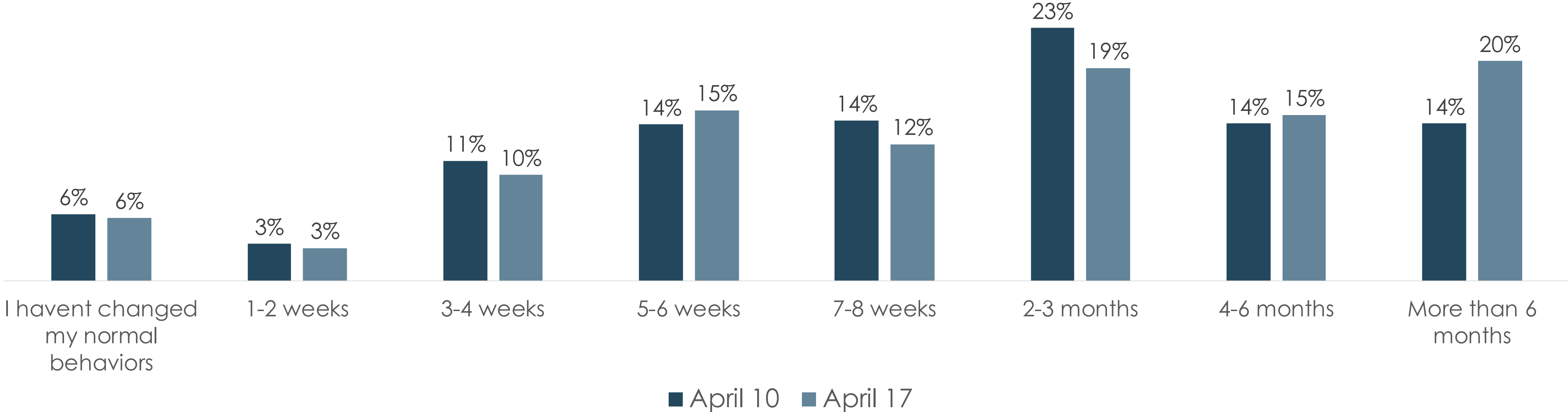
Average expected timeframe to develop a vaccine for Coronavirus
(in months)



How long do you think it will take to develop an effective vaccine to protect people from Coronavirus?

And, while logic would suggest that with each passing week the expectation for a return to normalcy would be closer, it has in fact gotten slightly farther out.

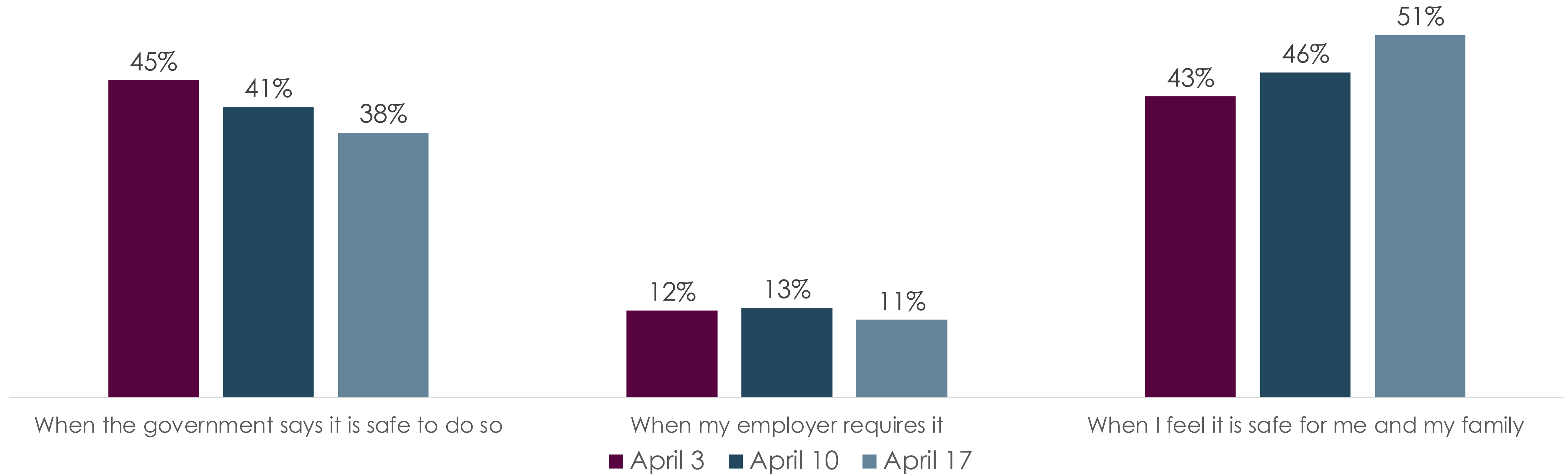
Timing of return to normal behavior



When do you think it's likely that you'll return to your normal behaviors (going to work, eating out, shopping, etc.)?

Increasingly, people are likely to use their own judgement on when to return to normal behaviors as opposed to relying on government direction.

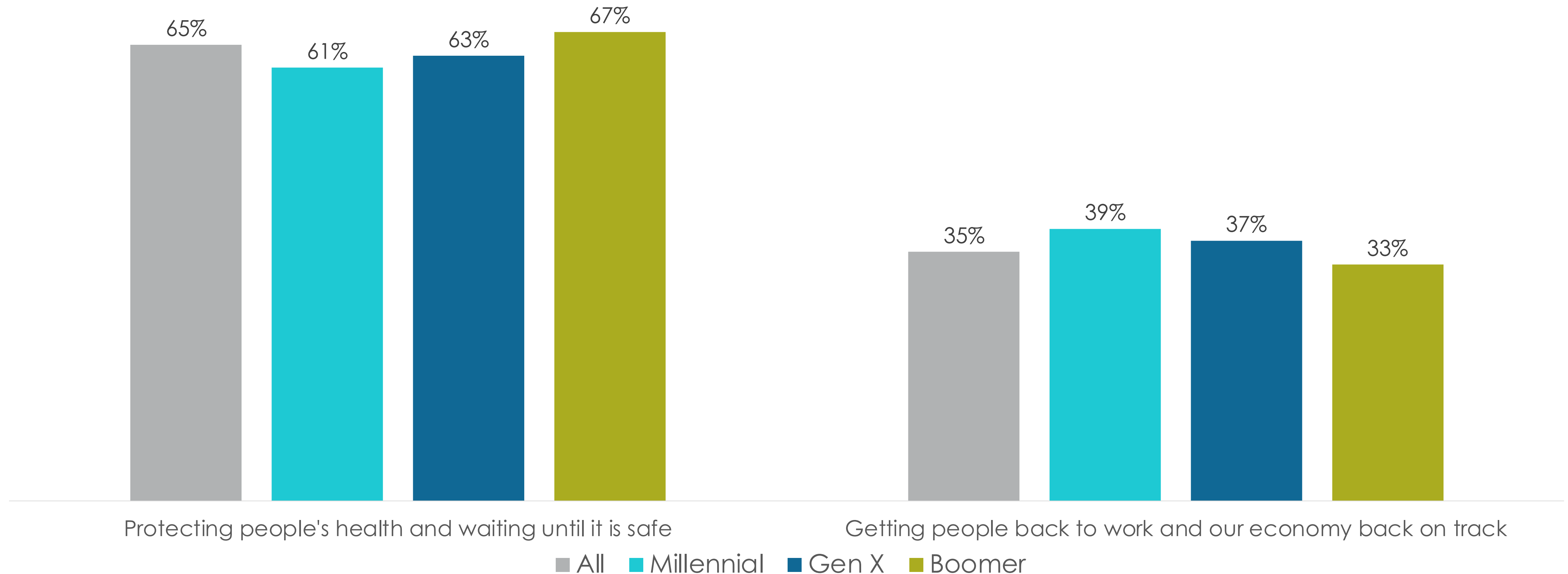
Motivation to return to normal behaviors



Which of the following best describes when you'll return to your normal behaviors?

When weighing protecting people's health vs. getting the economy back on track, respondents are nearly twice as likely to be concerned about health.

Influence on the decision to open the country back up



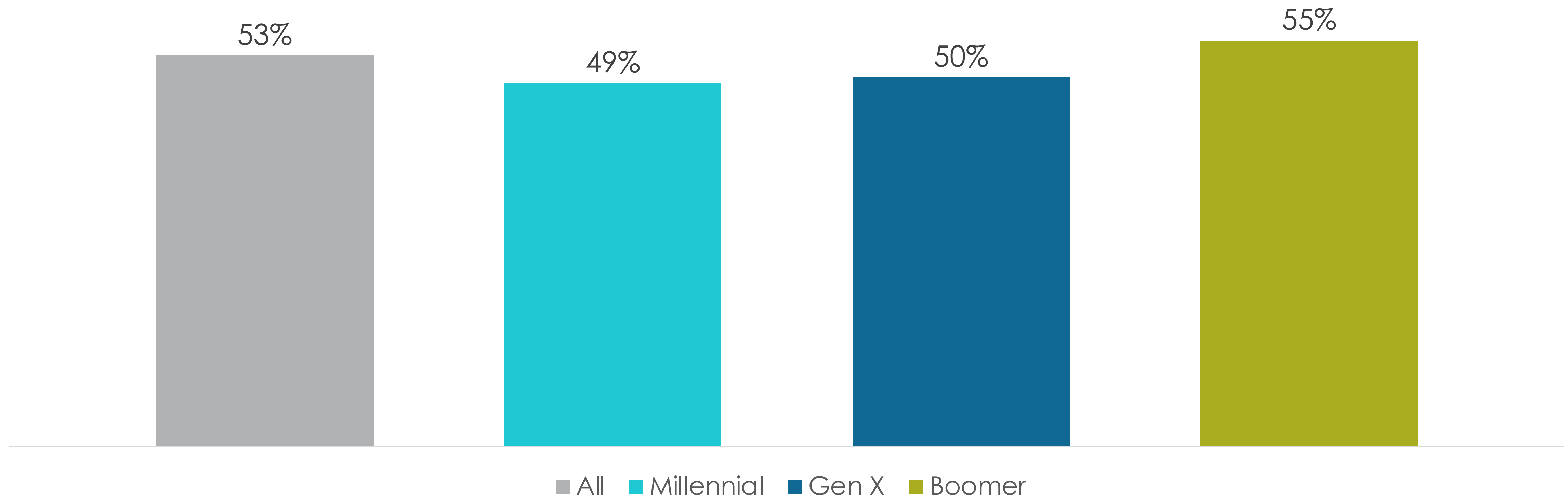
Allocate 100 points between the two options based on how influential you think they should be in the decision to open the country back up.



Staying connected

More than half of people feel less or much less connected to the outside world as a result of the distancing COVID-19 has created.

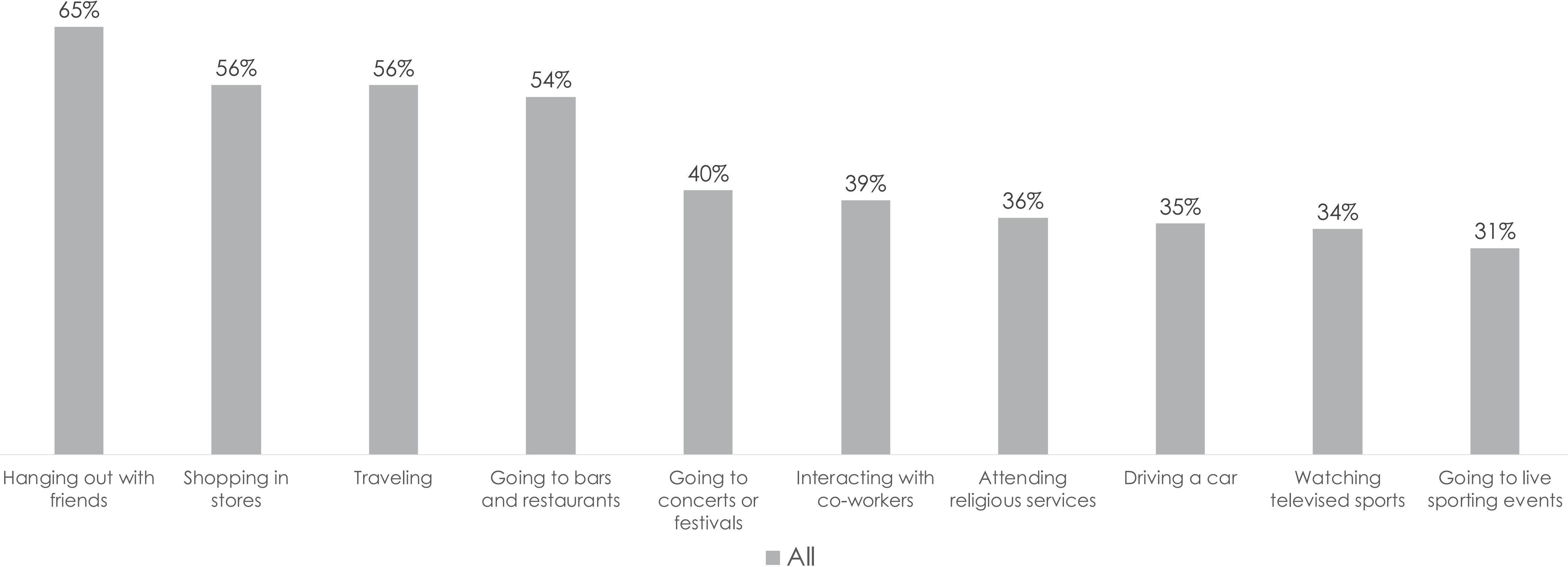
Feeling less connected as a result of shelter-in-place orders



As a result of shelter-in-place orders how much less connected do you feel to the outside world?

It's not surprising people feel disconnected, as so many key points of interaction have been taken away. And, people miss them.

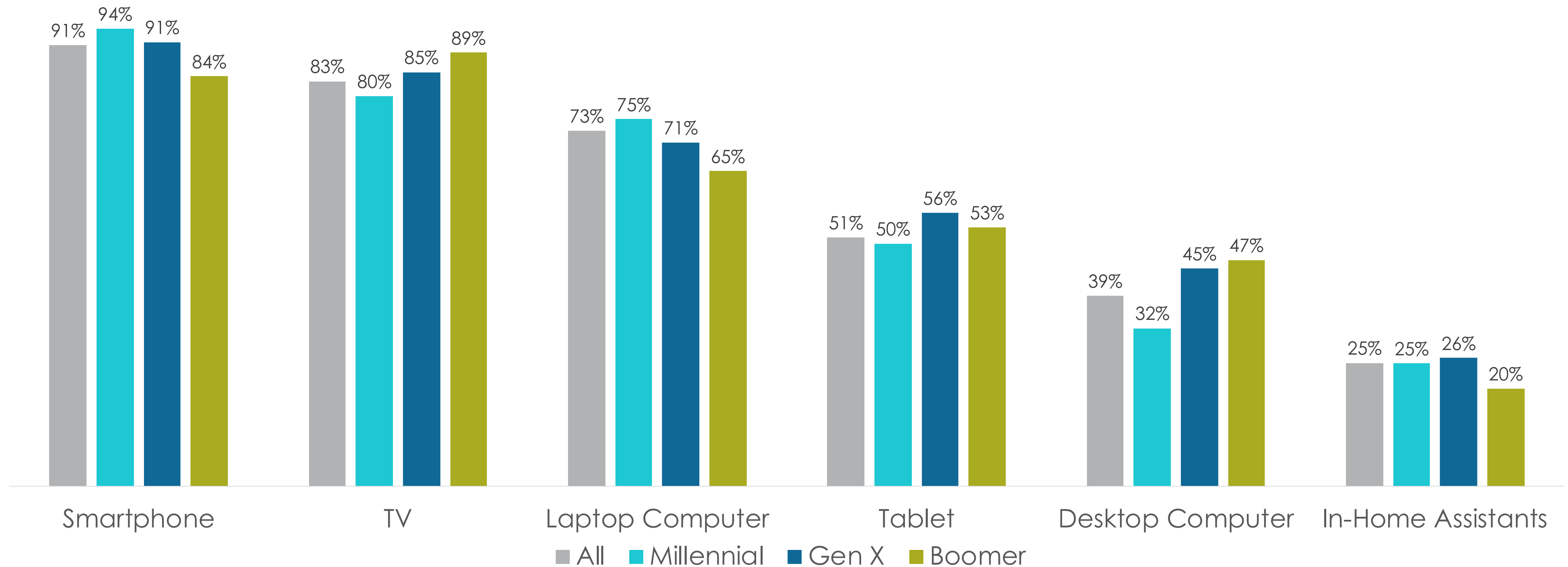
Activities people are missing



How much do you miss the following activities that were fairly common prior to the breakout of COVID-19

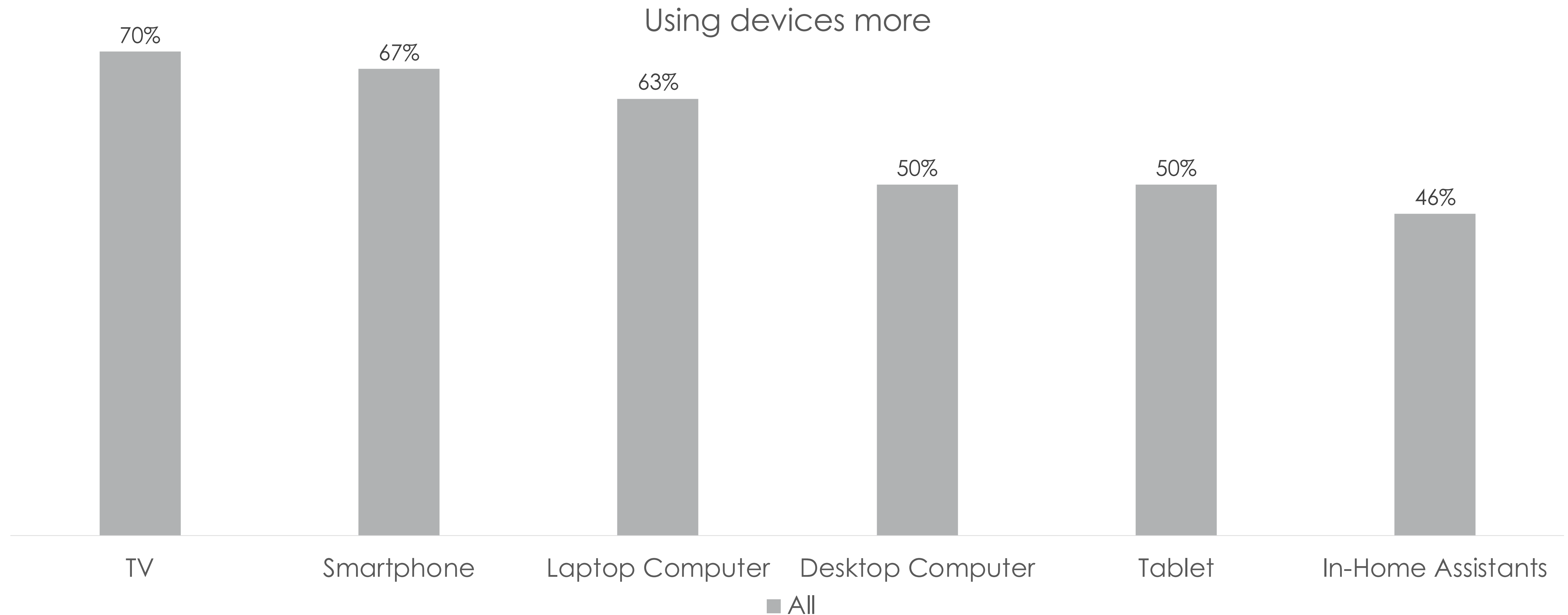
Fortunately, the penetration of electronic devices is very high.

Device use



What type of devices do you use at home? Select all that apply.

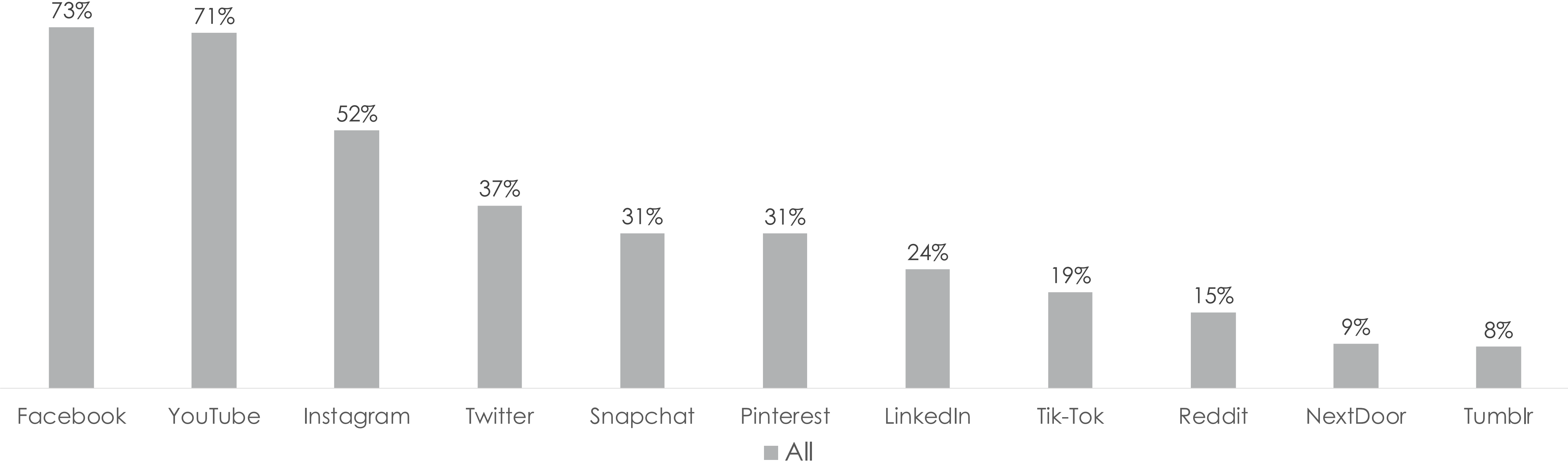
Most people are using 3 or more of their devices more or much more than pre-Coronavirus.



How has your use of the following devices changed compared to last month?

Only 3 of the major social media platforms are used by more than 50% of respondents. But the average respondent is using more than 3 social media platforms.

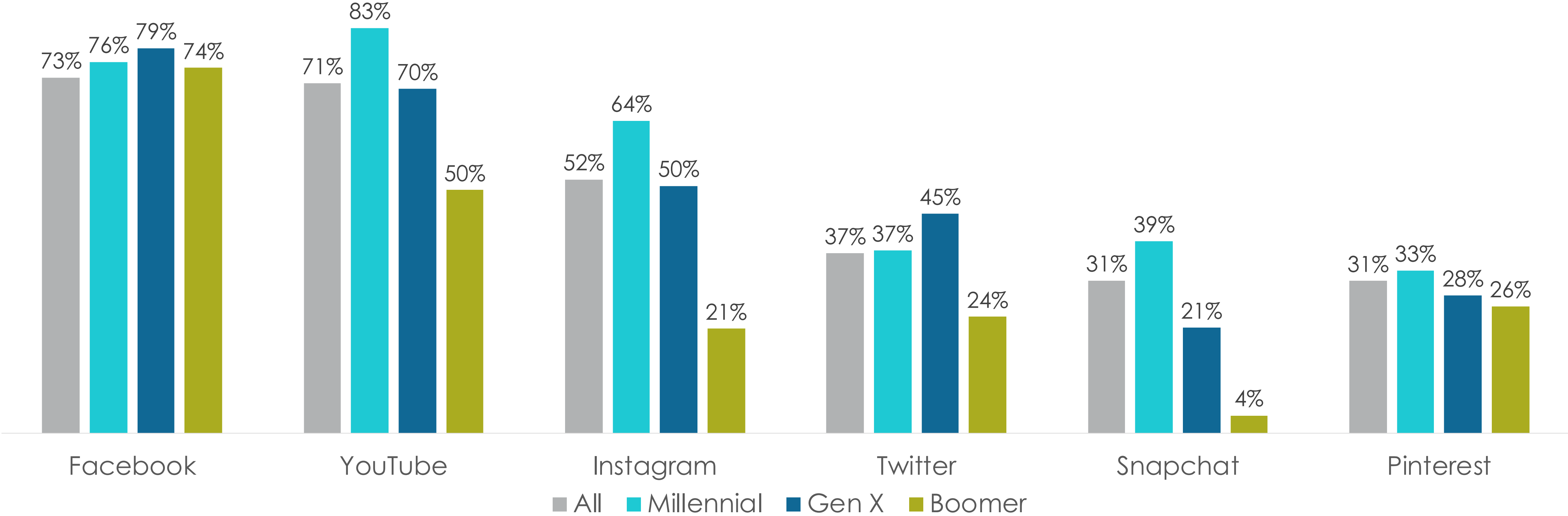
Social media use



Which of the following social media platforms do you currently use?

And, while social media use is highest among Millennials, it's not exclusively their purview. Even digitally challenged Boomers are engaging.

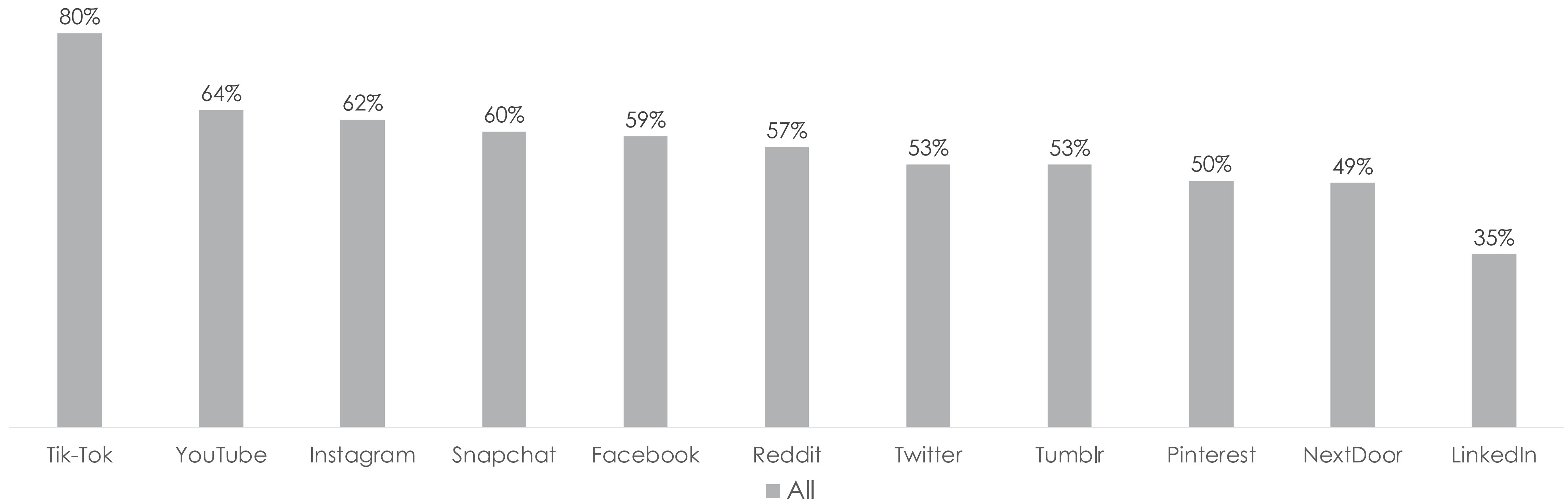
Social media use



Which of the following social media platforms do you currently use?

Social media use is up dramatically. Not surprisingly, it is led by an emerging platform in Tik-Tok.

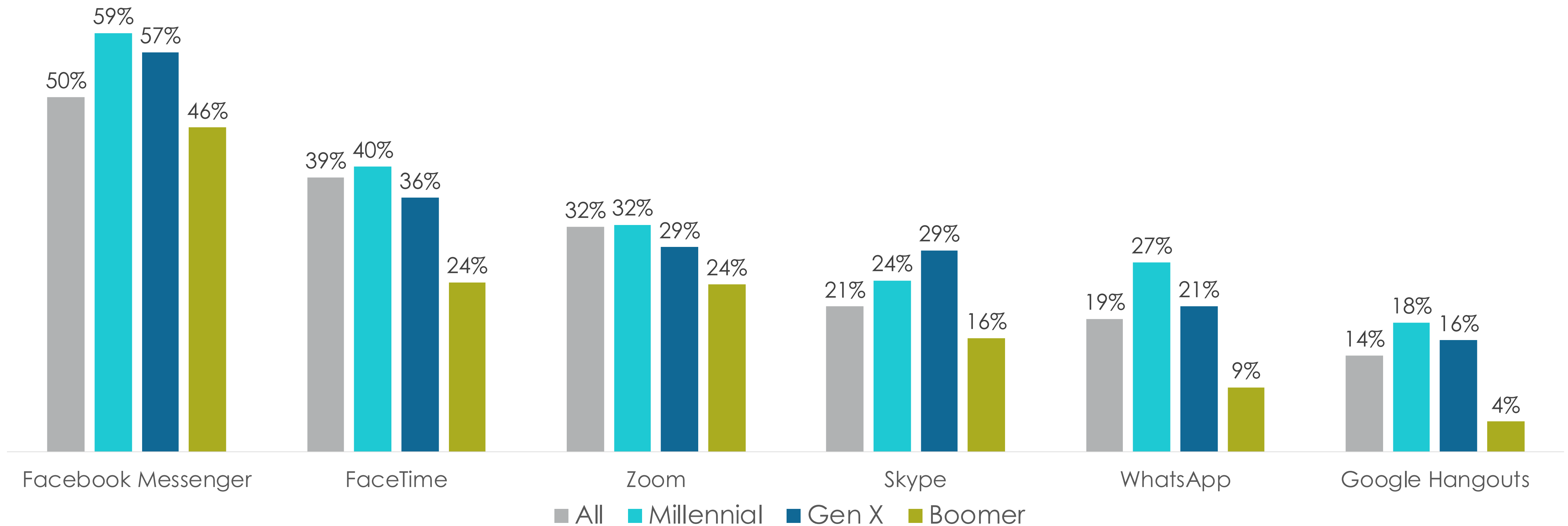
Social media use increase



Compared to a month ago how often do you currently use each social media platform?

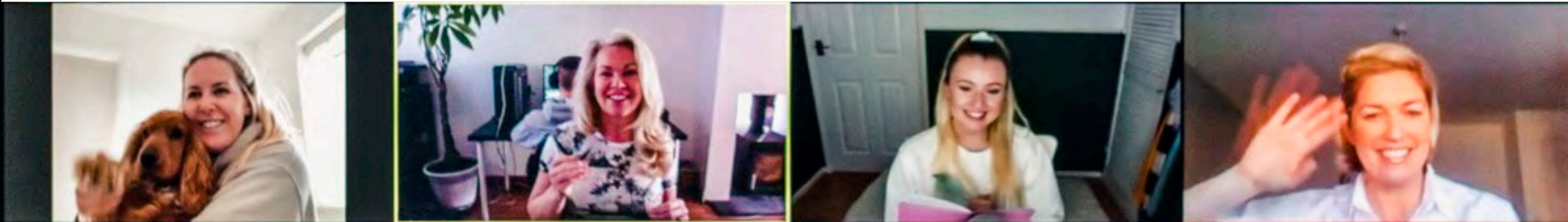
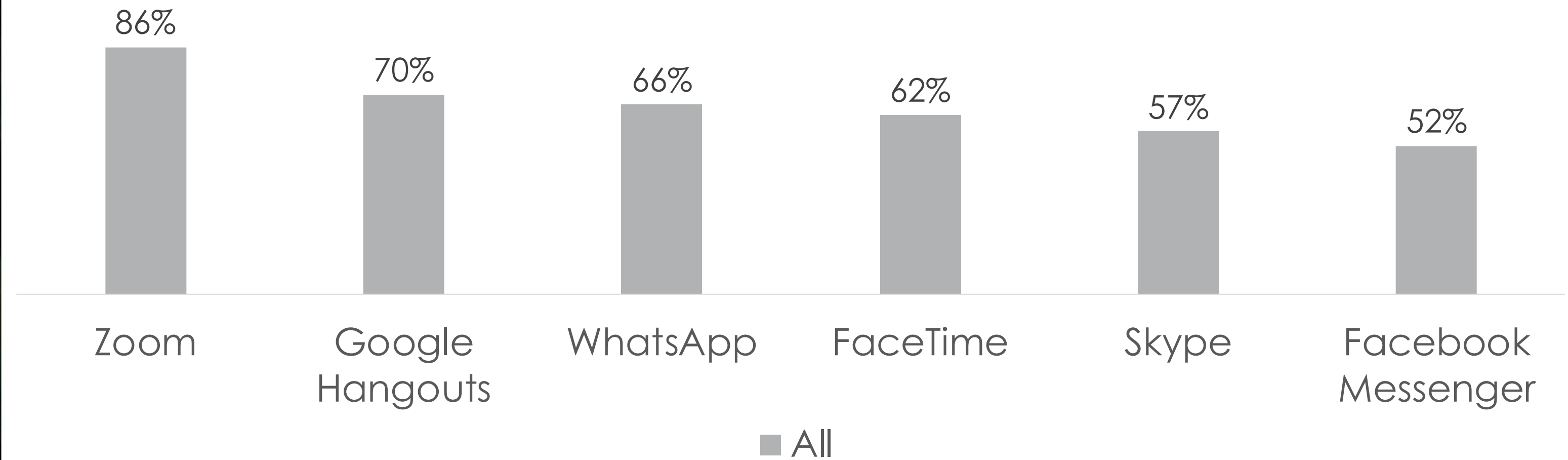
Respondents are using a host of communication platforms that offer the opportunity for face-to-face interaction.

Communication platform use



Which of the following communication platforms do you currently use?

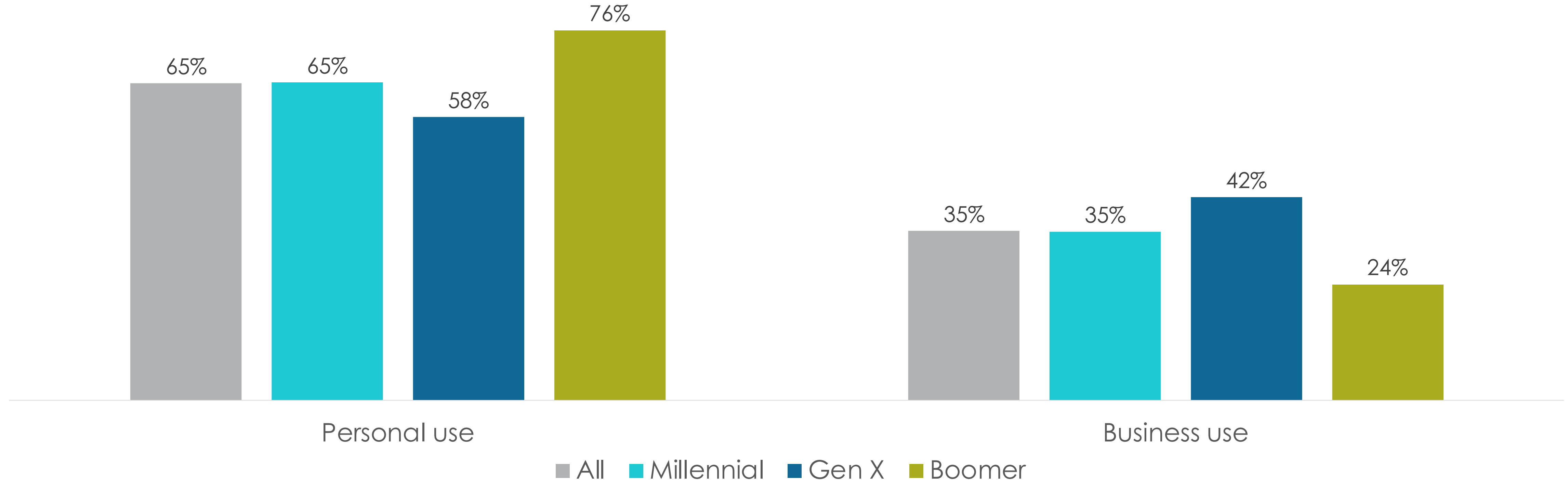
Using communication platforms more



Compared to a month ago how often do you currently use each communication platforms?

While the use of communication platforms to keep business moving has been well documented, two-thirds of the increased activity reported is personal use.

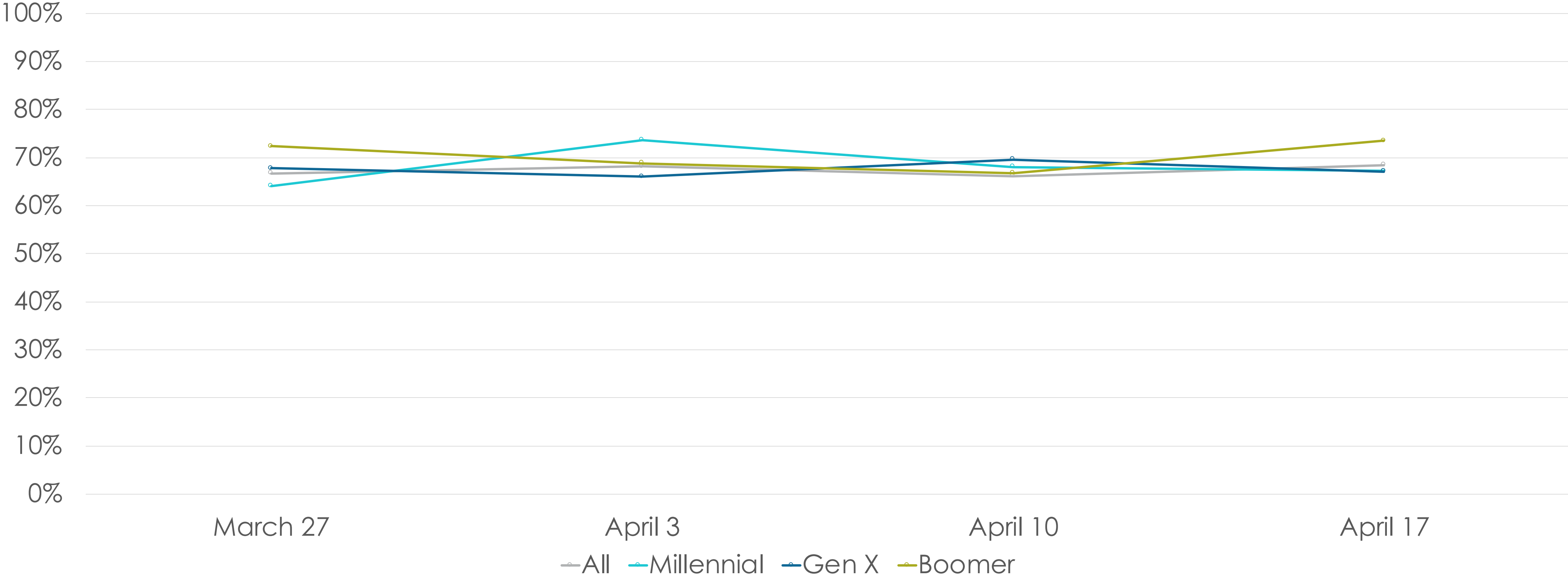
Purpose for increased use of communication platforms



What % of your increased use of online communication platforms is for business vs. personal use. Total must = 100%.

Undoubtedly, the availability of digital media is helping people cope with these trying times. Nearly 70% of respondents feel they are handling shelter-in-place requirements well.

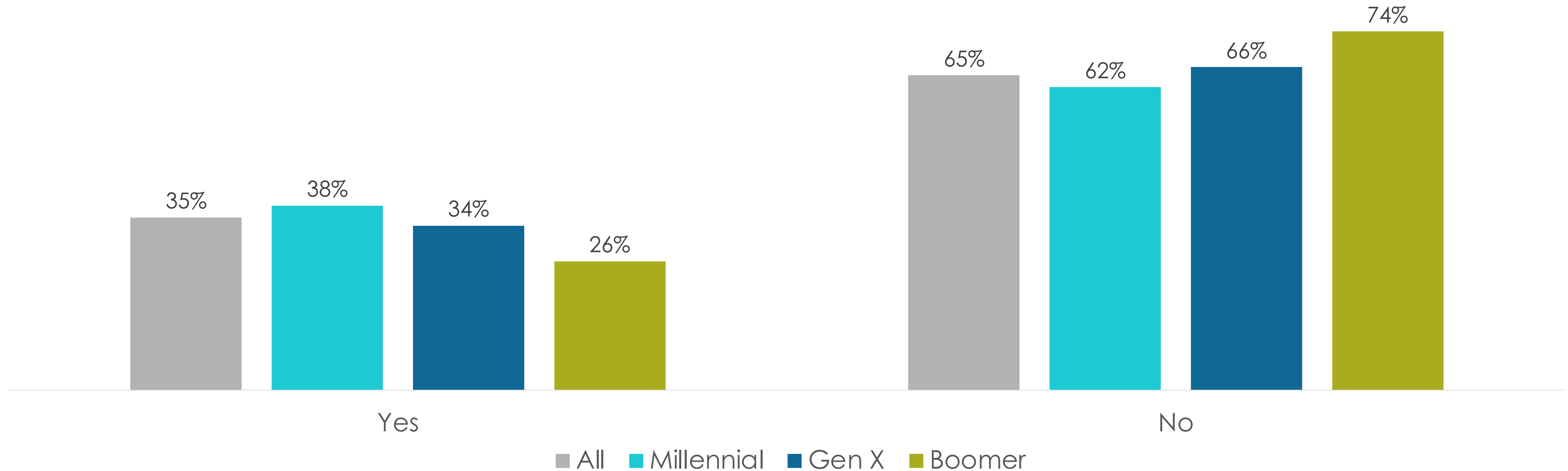
Adaption to shelter-in-place orders



How have you adapted to the shelter in place order?

Fortunately, people recognize that not everyone is handling isolation well.

Concerned about family/friends not handling shelter-in-place well

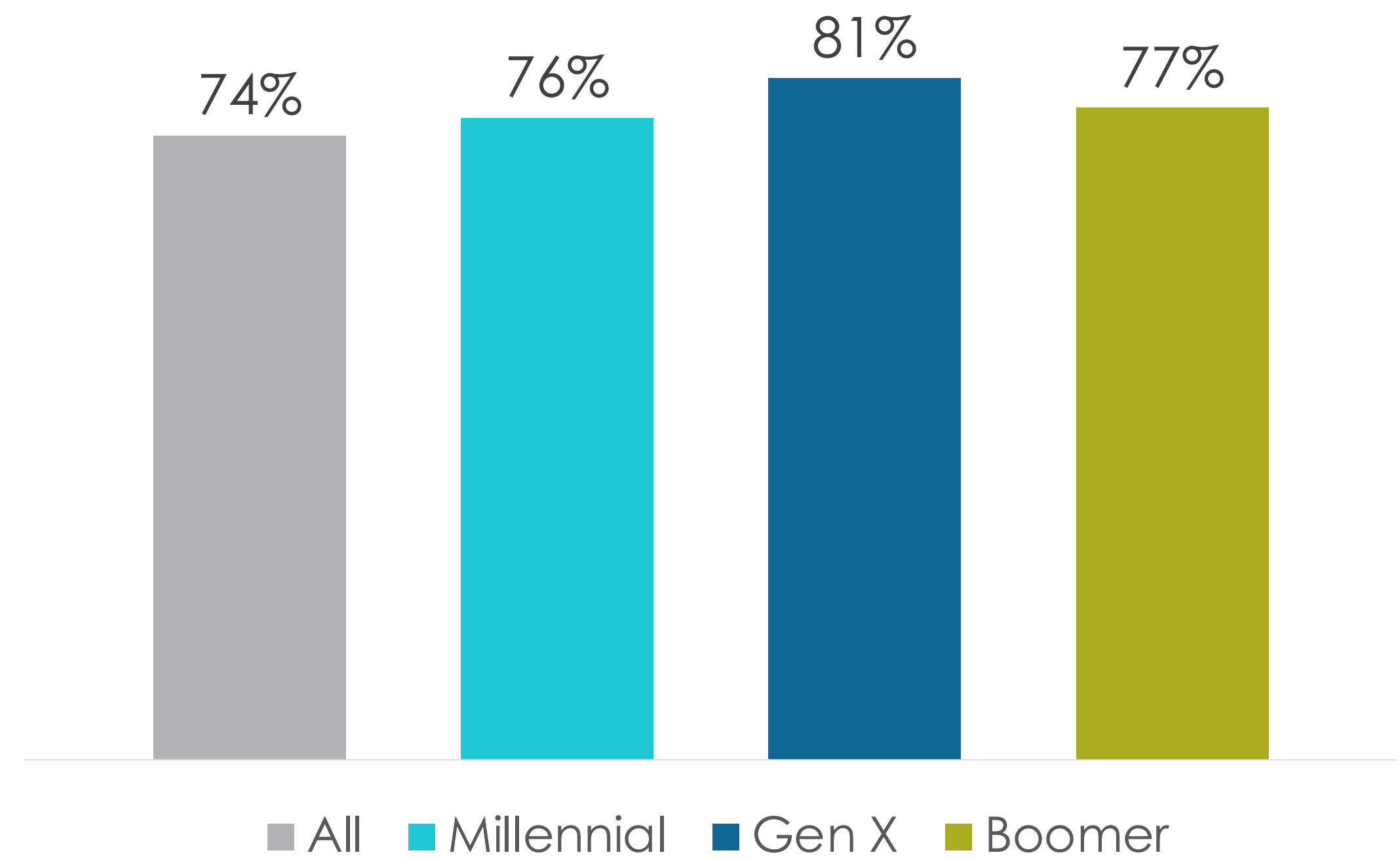


Do you have friends or family members that you are concerned about because you don't feel they're handling the shelter-in-place requirement well?



People are willing to do something about it. Nearly three-quarters are frequently reaching out to those they're concerned about.

Frequently reaching out to family/friends not handling shelter-in-place well



How frequently are you reaching out to those you are concerned about?

Conclusions

Most people seem to have settled into their new behaviors.

- Among the 50% of respondents who must go to work, 55% feel they are making an important contribution while 45% are working for the paycheck.
- 75% of respondents feel the precautions they're taking will suffice. But, among many, those precautions may not be enough.
 - 89% of people are still going into the grocery store, and 26% of aren't worried about doing so.
 - Despite guidance from the CDC and others, only 48% are regularly wearing masks when out in public.

Expectations for both a return to normalcy and the development of a vaccine are moving later.

- People are increasingly likely to make their own determination on when to return to their normal behaviors. This increased to 51% from 43% two weeks ago.
- When weighing the importance of protecting people's health vs. reviving the economy, health is the much greater concern.

Sheltering-in-place is taking its toll. 53% of people feel less connected to the outside world than they did previously.

- They miss the activities that provide human interaction, like hanging out with friends (65%) and going to bars and restaurants (54%).

Conclusions – continued

People are finding an alternative in social media and online connection.

- The average respondent is using more than 3 social media platforms.
- Communication platform use is also up dramatically.

As a result of their behaviors, 70% feel they are adapting to sheltering-in-place well.

- And 74% are making a concerted effort to stay in contact with those they feel aren't handling the isolation well.