



# COVID-19 U.S. CONSUMER IMPACT TRACKING STUDY – WEEK 8

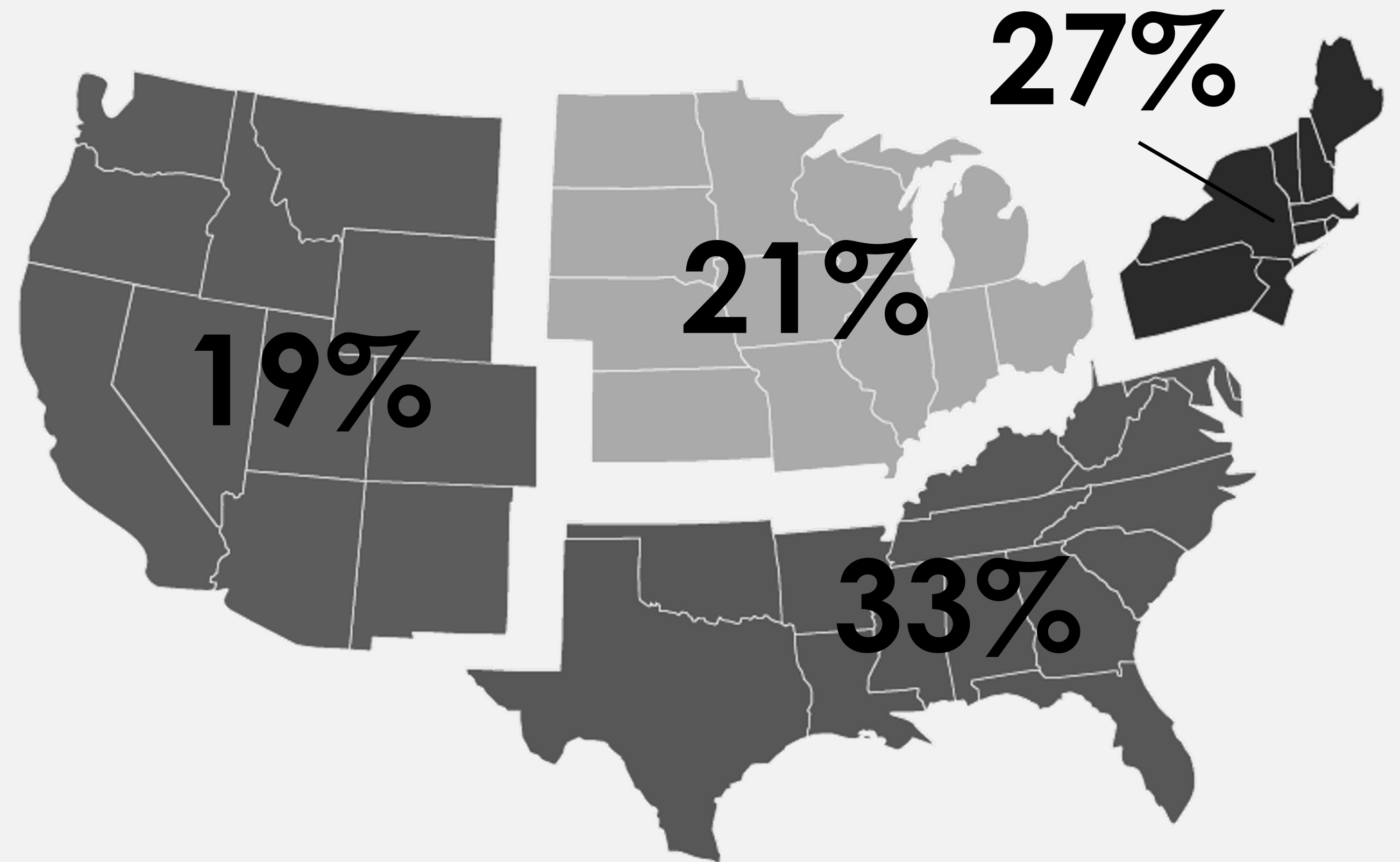
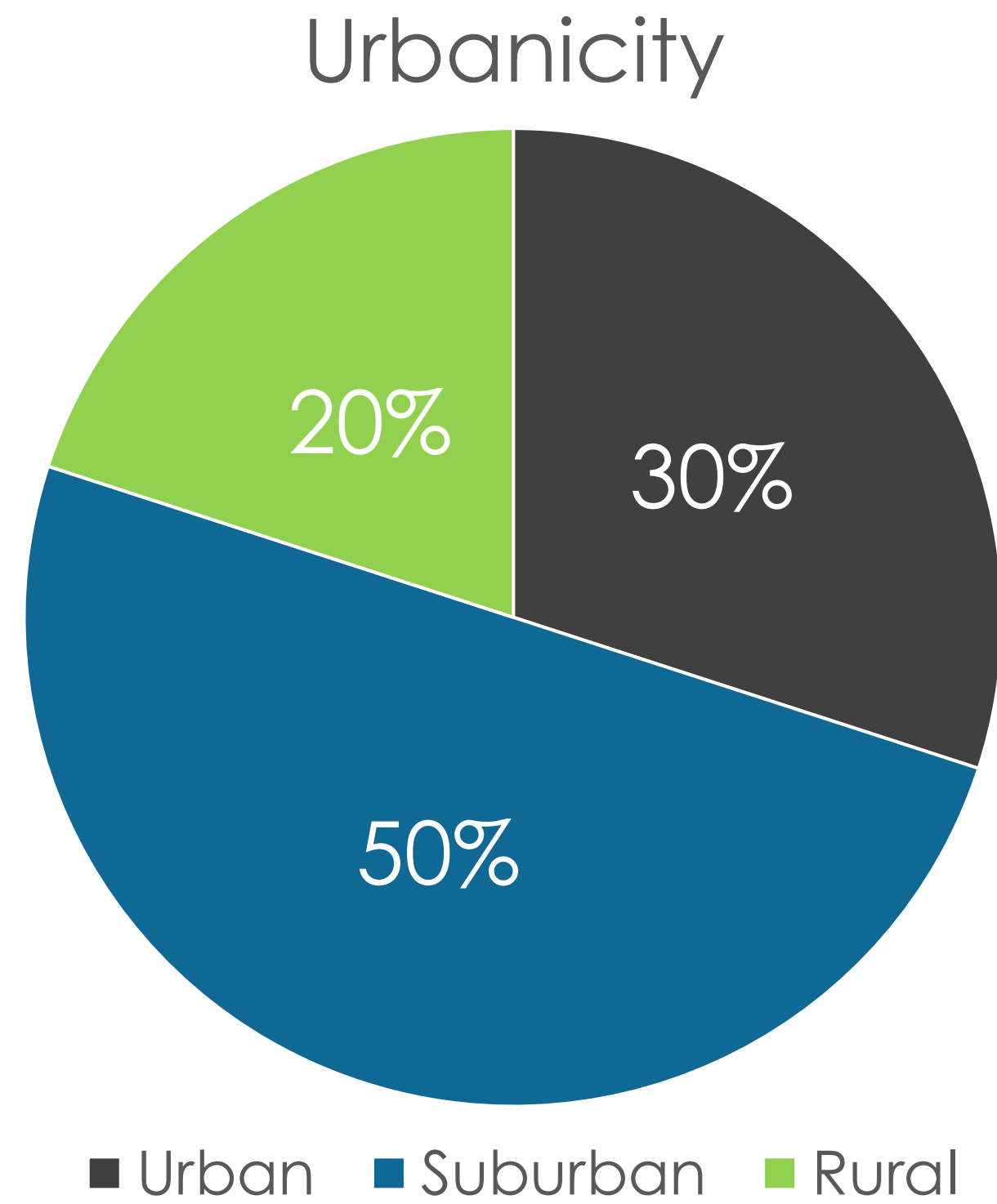
PRESENTED APRIL 27, 2020

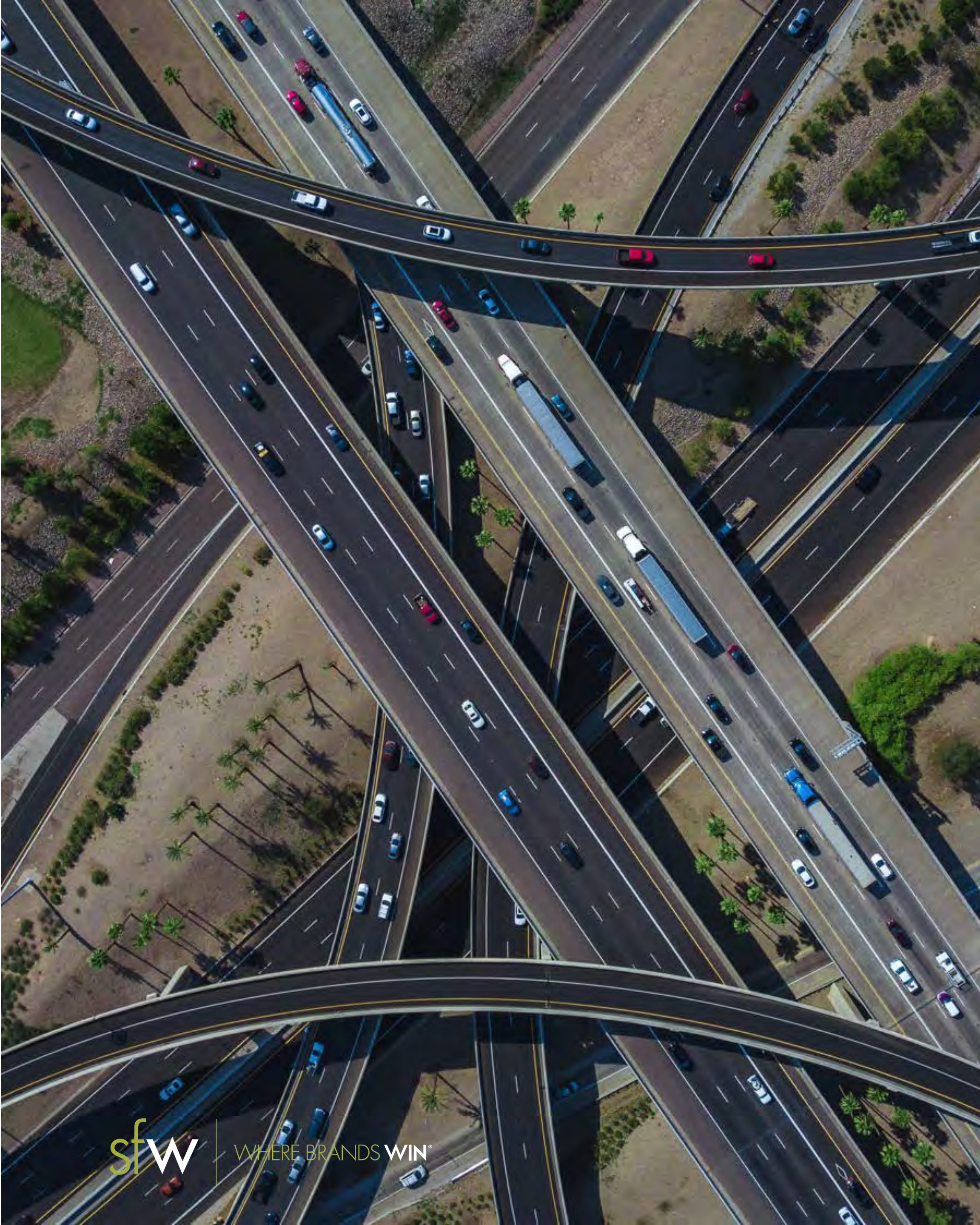
# Methodology

- N = 1,123; Census Balanced
- MOE =  $\pm 2.92\%$
- Panel: General Population
- Collected: 04/24/20, 04/25/20

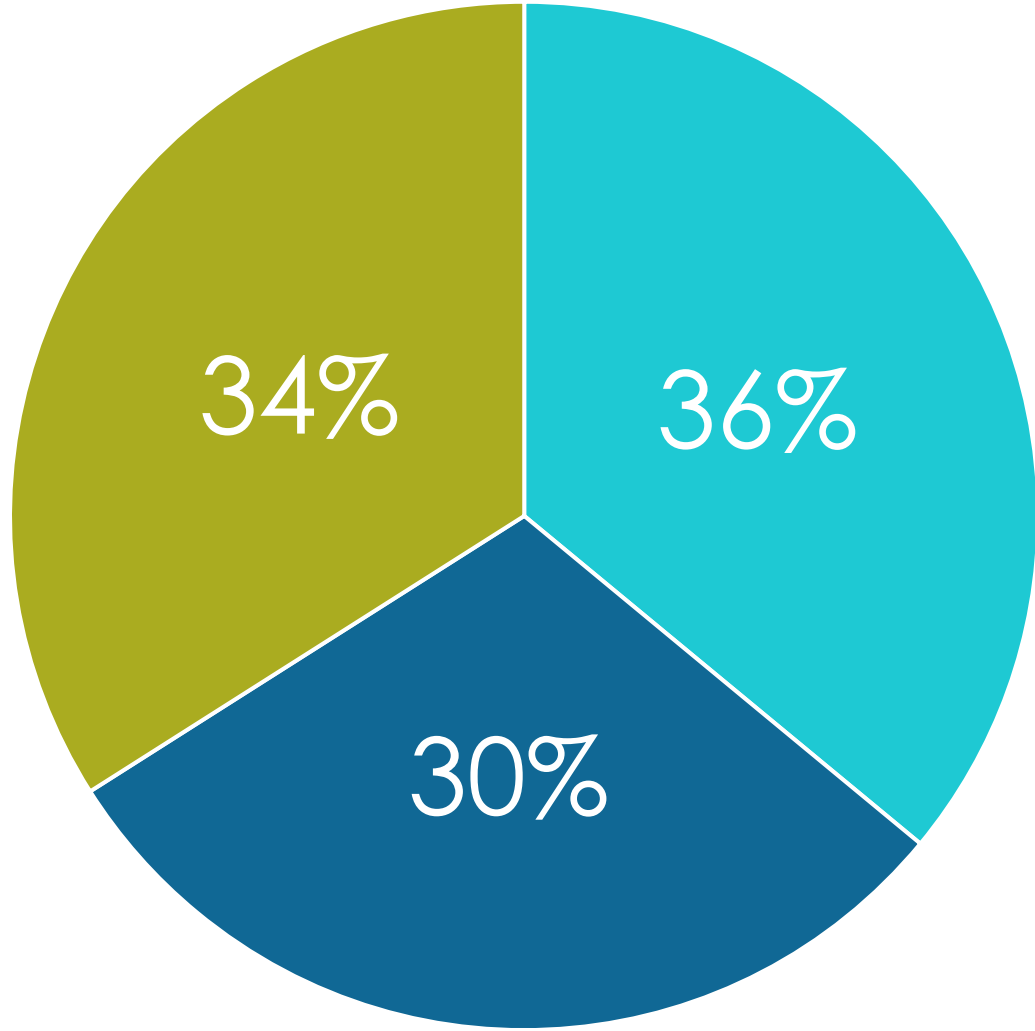


# Balanced Panel is Representative of America



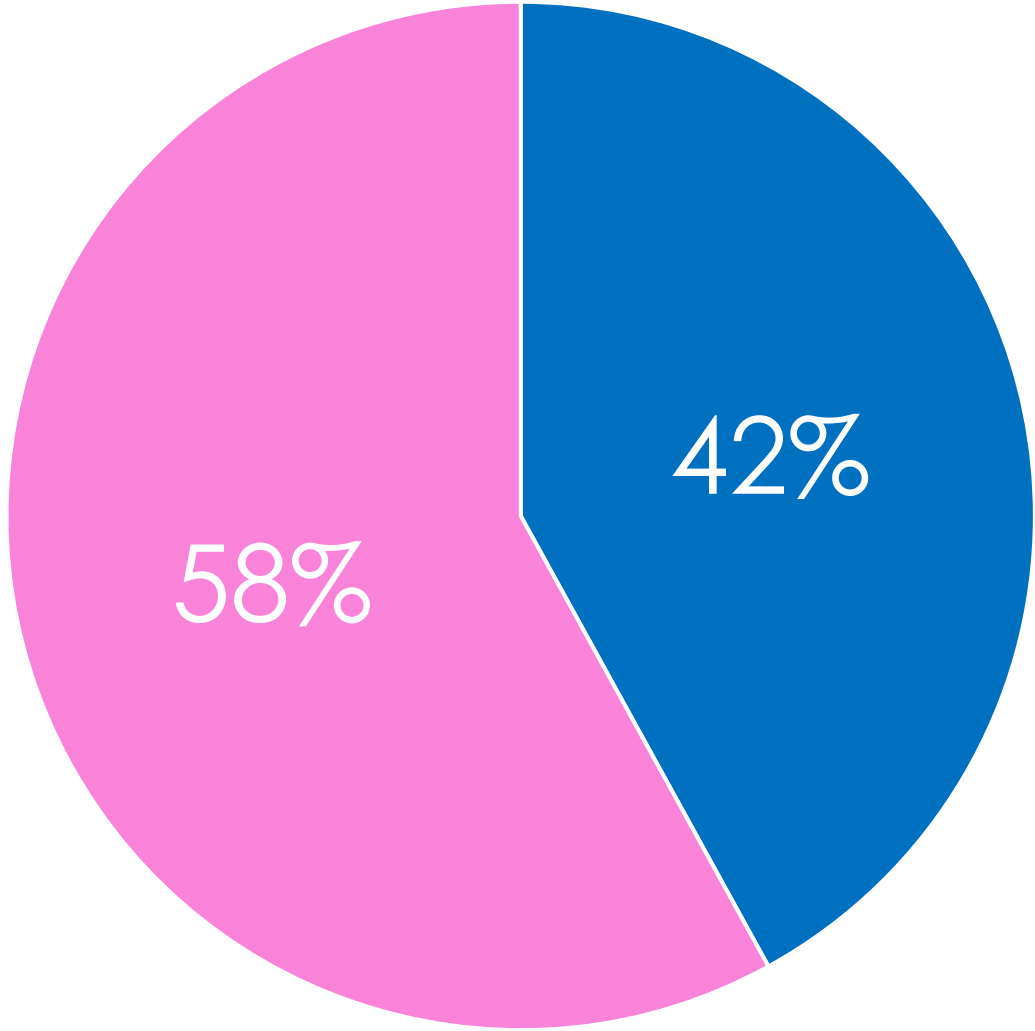


Generation



■ Millennial ■ Gen X ■ Boomer

Gender

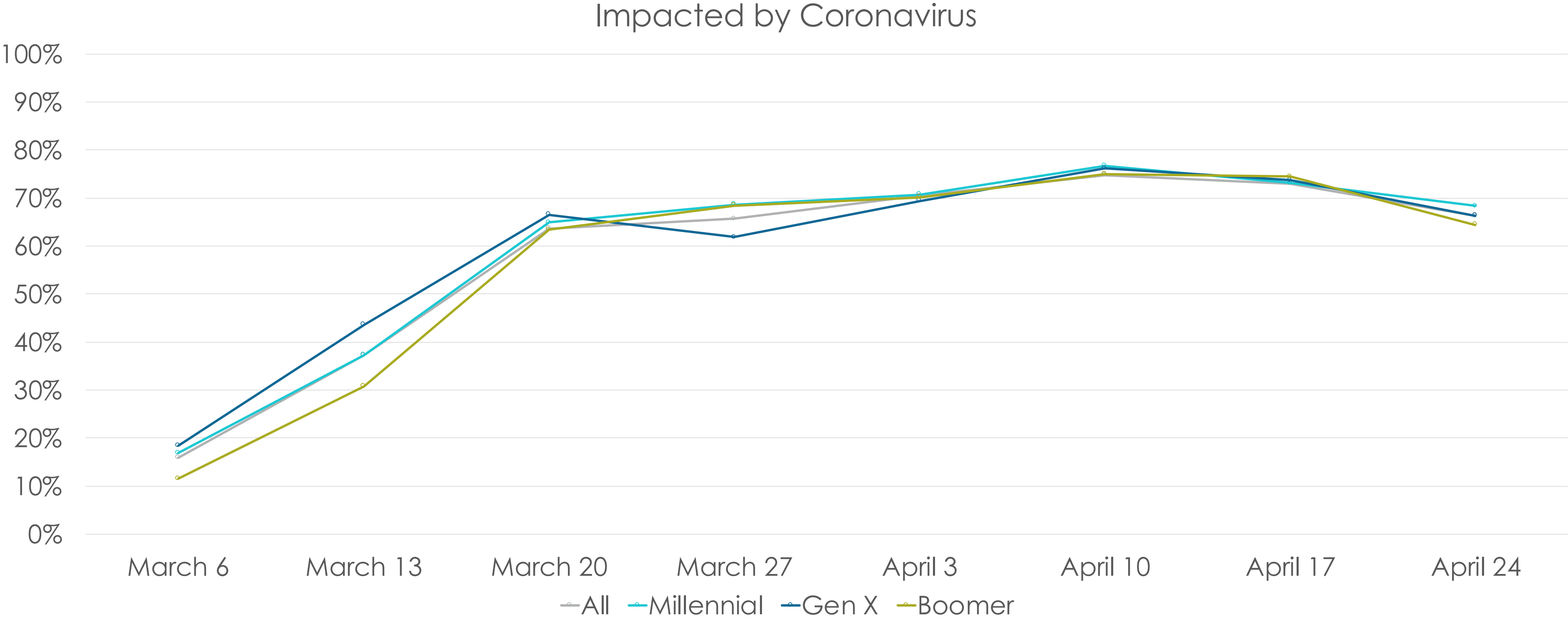


■ Male ■ Female



# COVID-19 Status

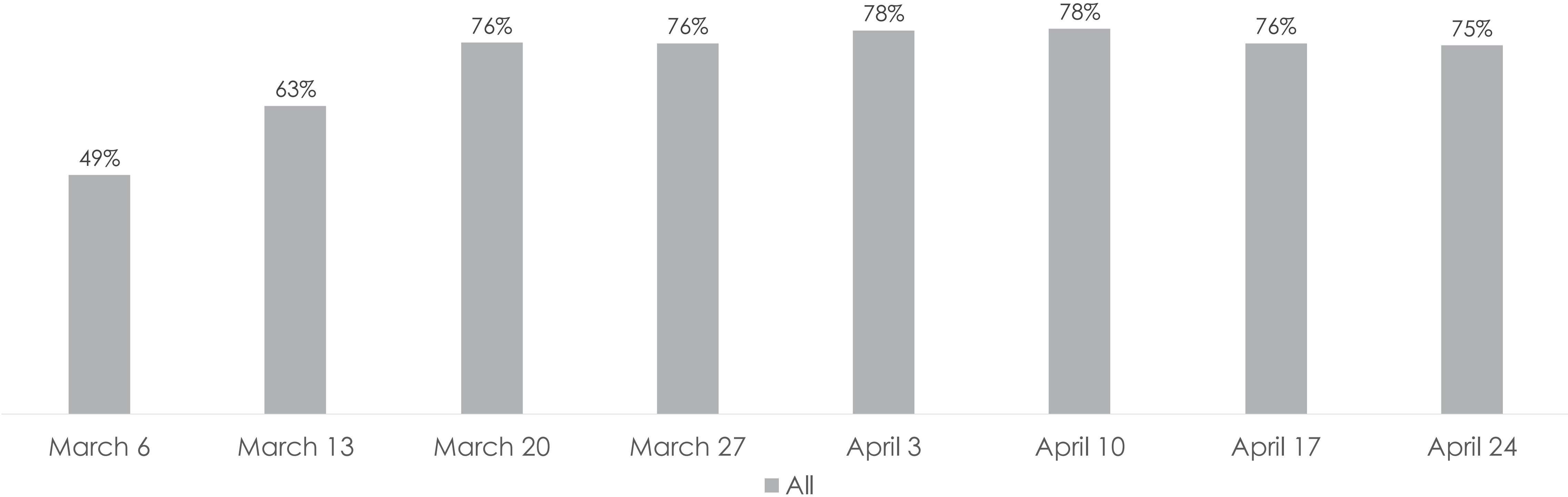
The % of respondents who feel they have been impacted by the Coronavirus has declined in each of the last two weeks.



Have you been impacted by the Coronavirus?

The level of concern regarding the virus has remained consistent for the last six weeks.

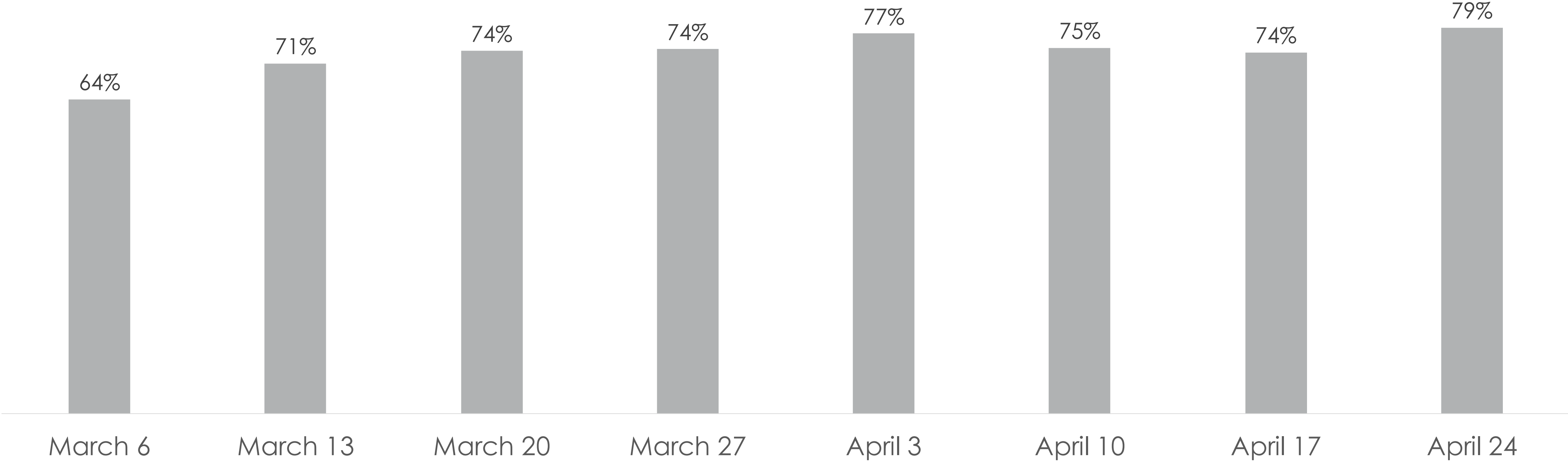
### Coronavirus concern



How concerned are you about the Coronavirus impacting your life in the coming year?

People's confidence that the extra precautions they are taking will protect them increased slightly in the past week.

Confidence in extra precautions



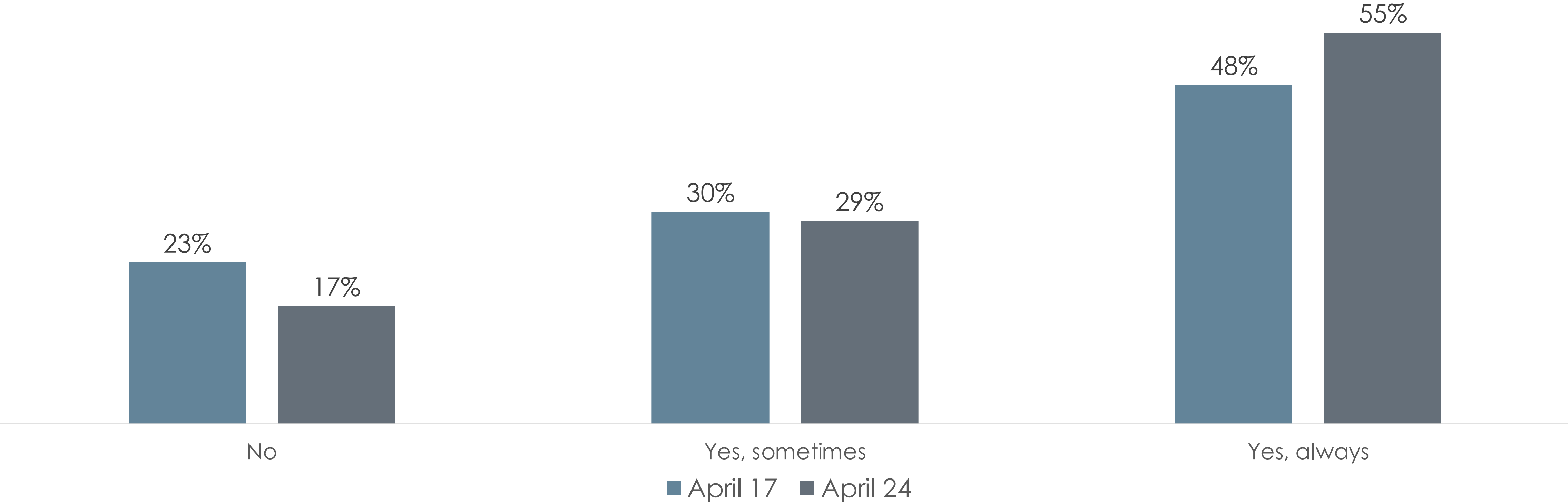
■ All

How confident are you that taking extra steps to protect yourself (avoiding crowds, washing your hands more frequently, etc.) will minimize the likelihood that you will get the Coronavirus?



The increased confidence in the ability to protect themselves may be a result of extra precautions. The number of people never wearing a mask is down to 1 in 6. It was nearly 1 in 4 last week.

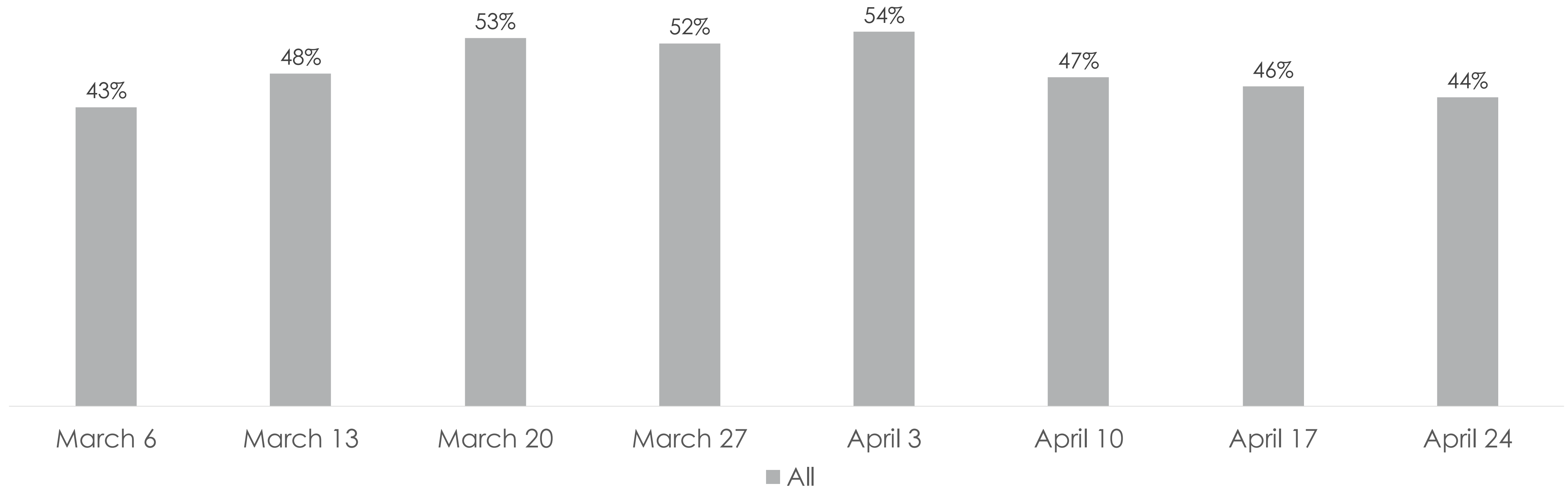
Wearing masks in public



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

Despite the news coverage generated by the various levels of government, only 44% feel they are being kept well informed.

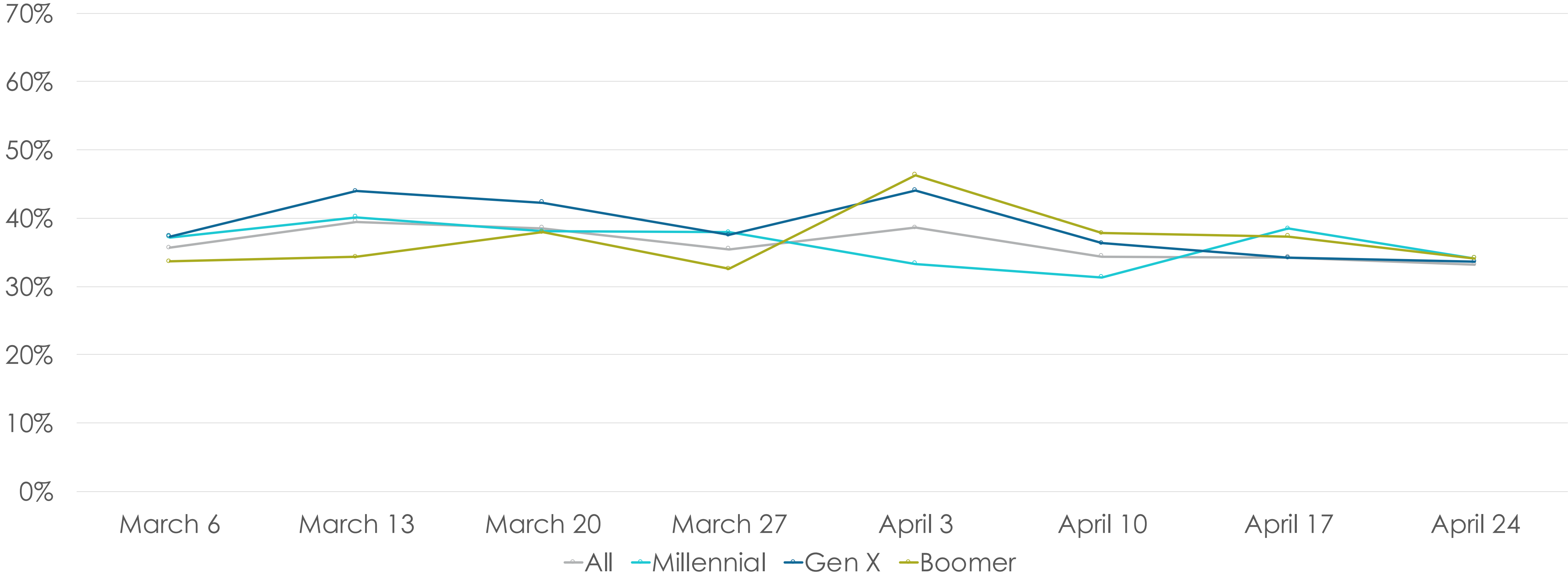
Confidence that the government is keeping us up-to-date



How confident are you that the government is keeping us up to date on the status of Coronavirus in the U.S.?

Whether it's because of the news coverage or in spite of it, only one-third of the sample feel that the government is prepared to handle the outbreak.

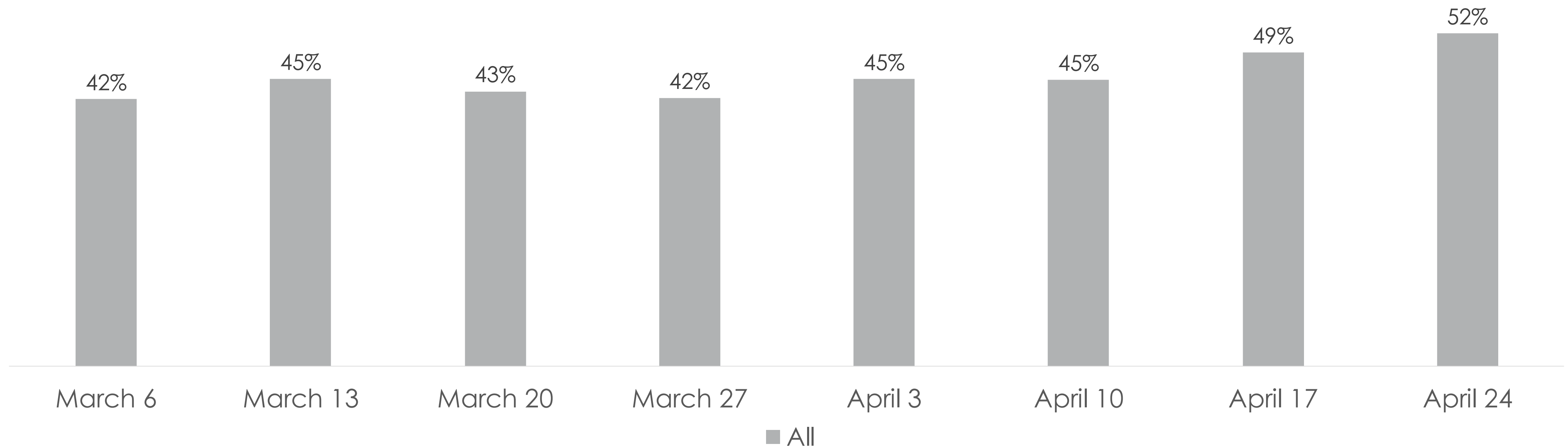
Confidence that the government is prepared to handle the Coronavirus outbreak



How confident are you that the government is adequately prepared to handle a Coronavirus outbreak in the U.S.?

Confidence in local medical providers is significantly higher than it is in the government and has increased 16% in the past two weeks.

### Confidence that local medical providers are prepared to handle the Coronavirus outbreak



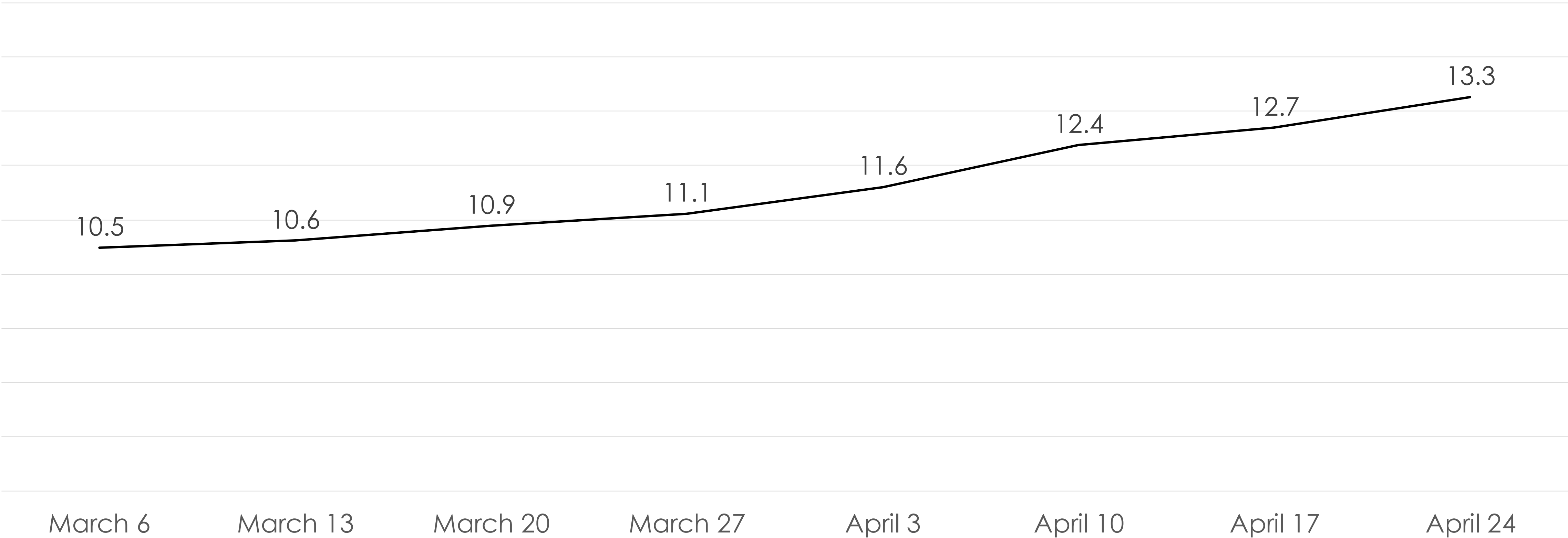
How confident are you that the medical providers (hospitals, doctors, etc.) in your community are prepared to deal with a Coronavirus outbreak?



Expectations

The expected timeframe for the development of a vaccine continues to lengthen. In the seven weeks since 3/6, the average has increased by 27%.

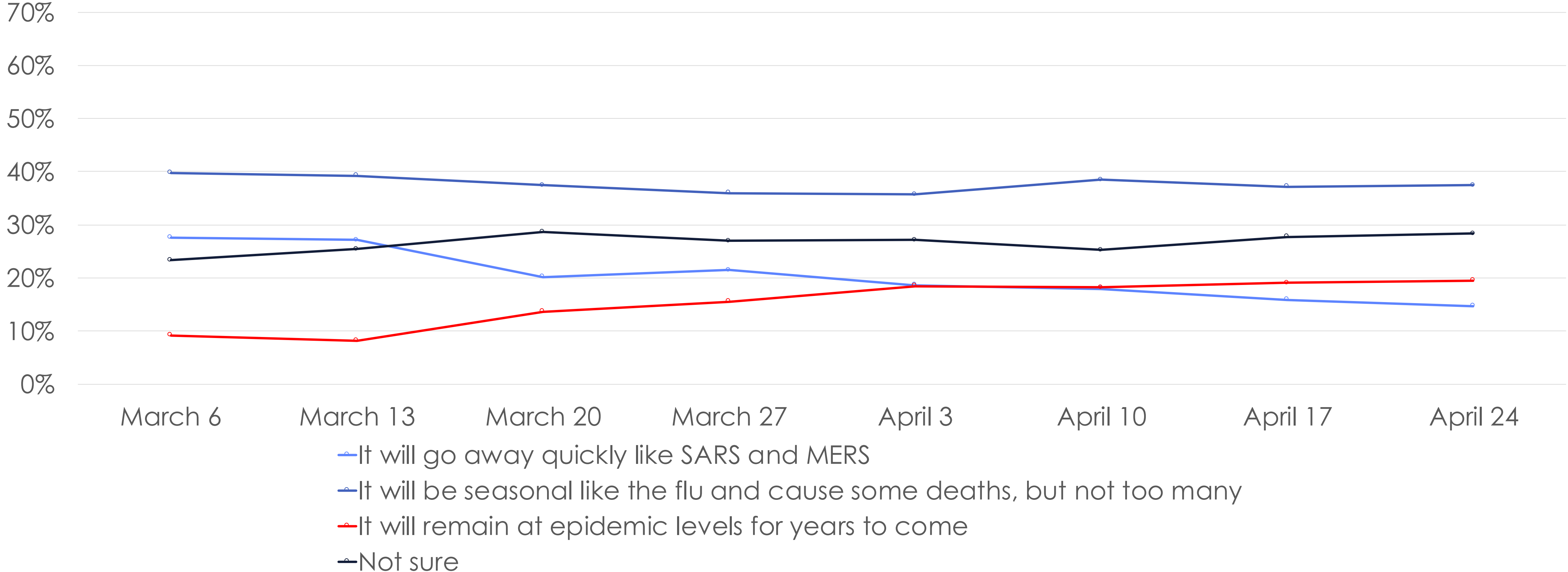
Average expected timeframe to develop a vaccine for Coronavirus (in months)



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

People's expectations for the future of the virus have changed dramatically in seven weeks. The percentage of people expecting it to just go away has nearly fallen by half while those expecting it to remain at epidemic levels for years has doubled.

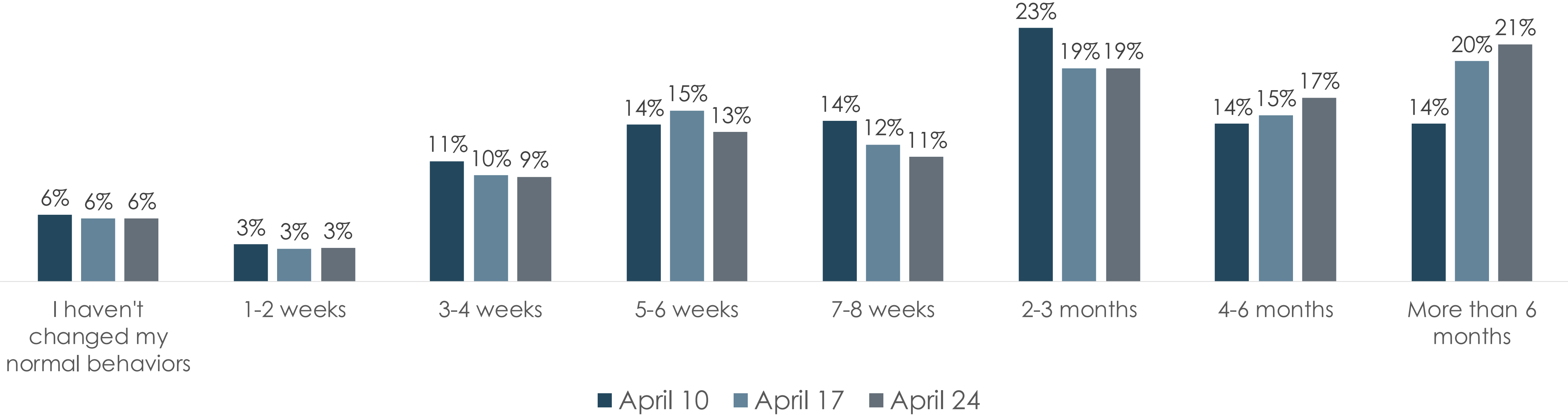
Expected long-term presence of Coronavirus



Which of the following best describes your expectation for the long-term presence of the Coronavirus?

38% now expect to return to normal in four or more months, an increase of 36% from just two weeks ago.

Timing of return to normal behavior

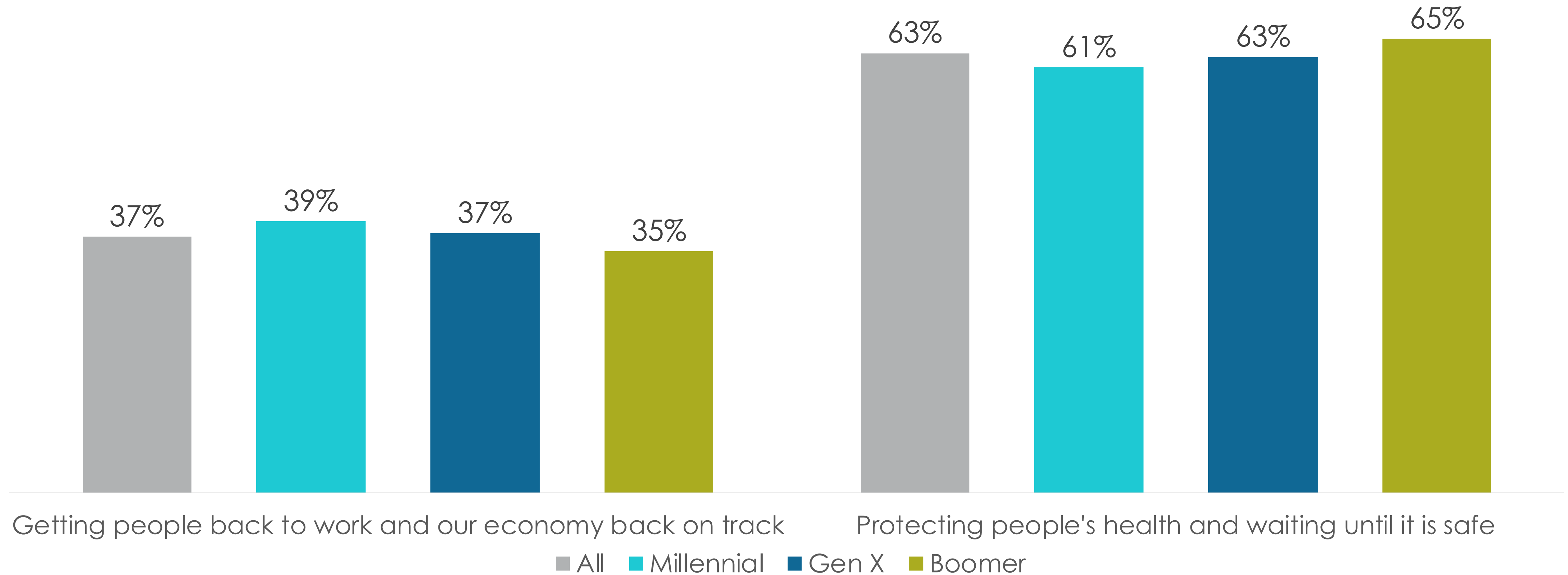


When do you think it's likely that you'll return to your normal behaviors (going to work, eating out, shopping, etc.)?



In determining when to reopen the country, respondents still favor keeping people safe over restarting the economy.

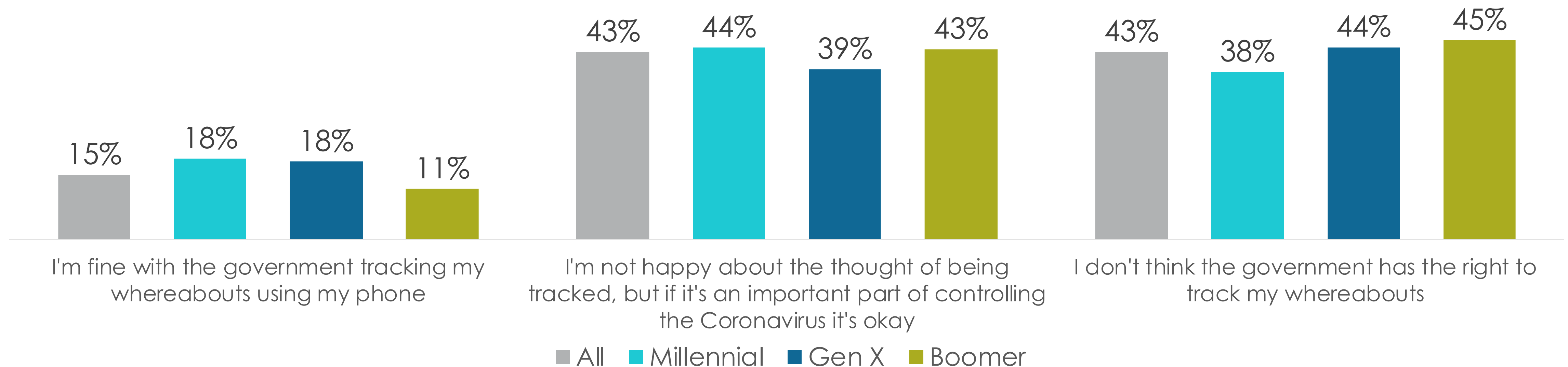
Influences for opening the country back up



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.

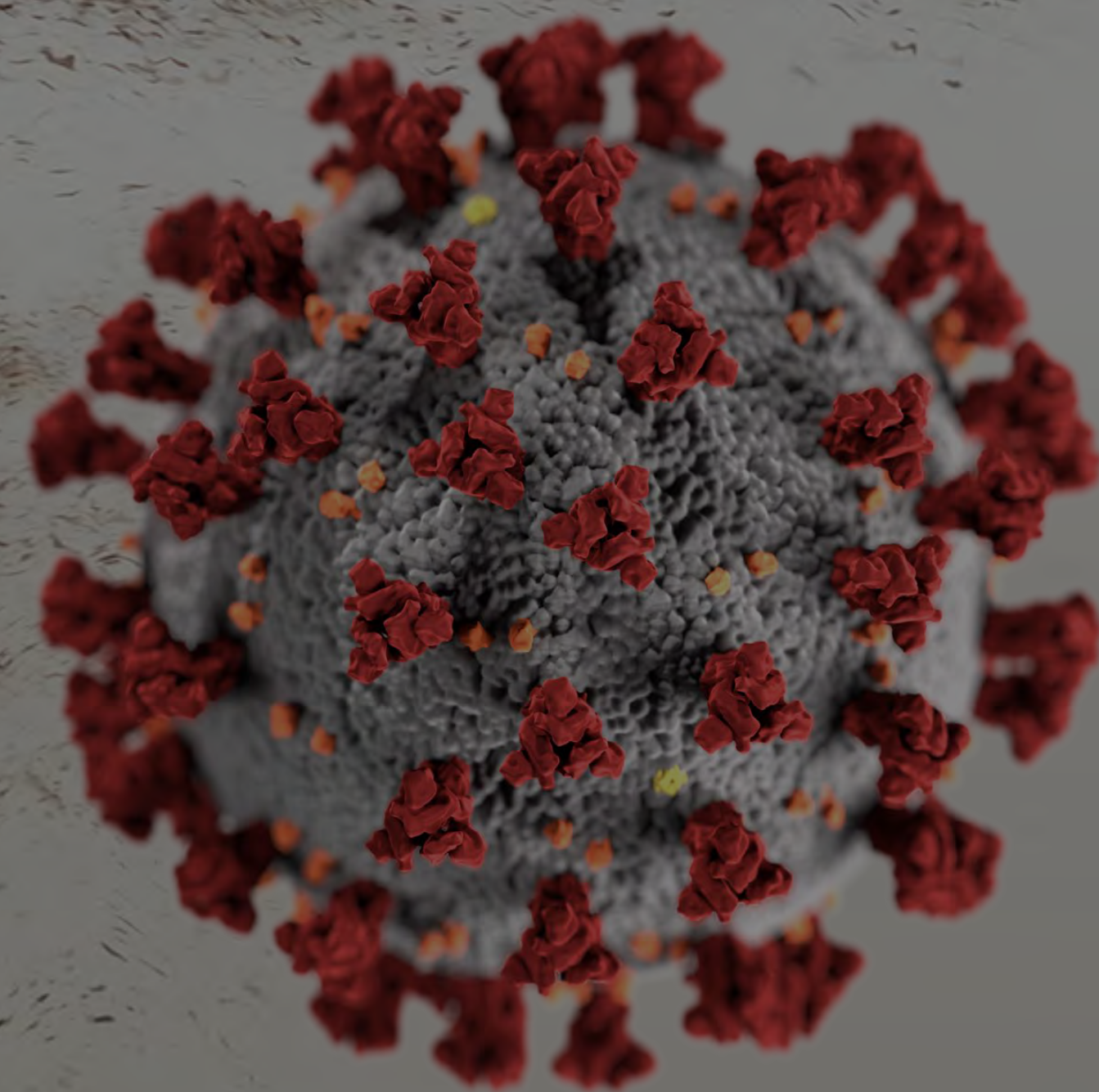
Despite the expressed concern about keeping people healthy, 43% of respondents don't feel the government has the right to track phones as a part of the fight to control COVID-19.

### Attitude about government tracking smartphones to monitor movement



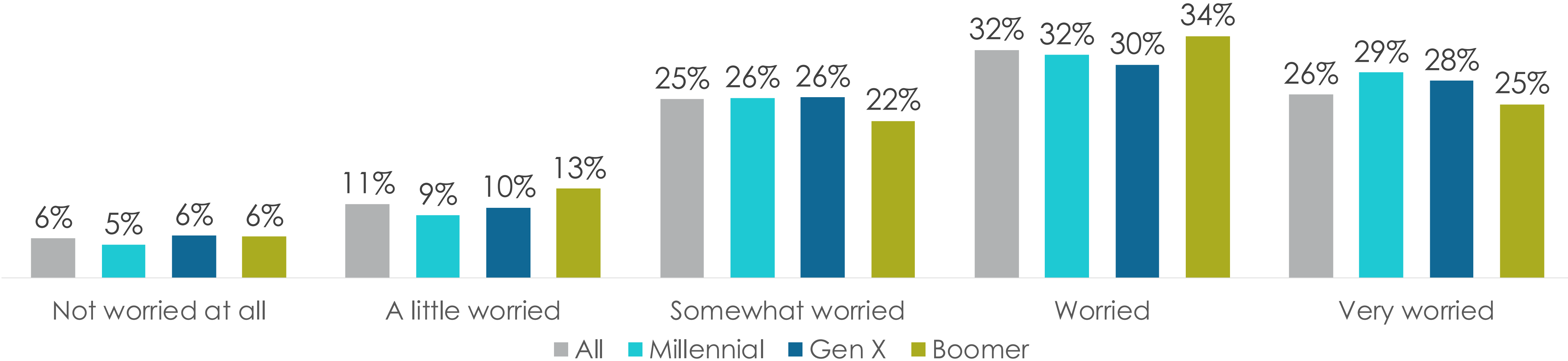
As a part of the continued fight against the Coronavirus the government is suggesting we track people's movement using their Smartphone. Which of the following best describes how you feel about that?

Worry



As expected, the overwhelming majority of people are at least somewhat worried right now, but only 26% consider themselves very worried.

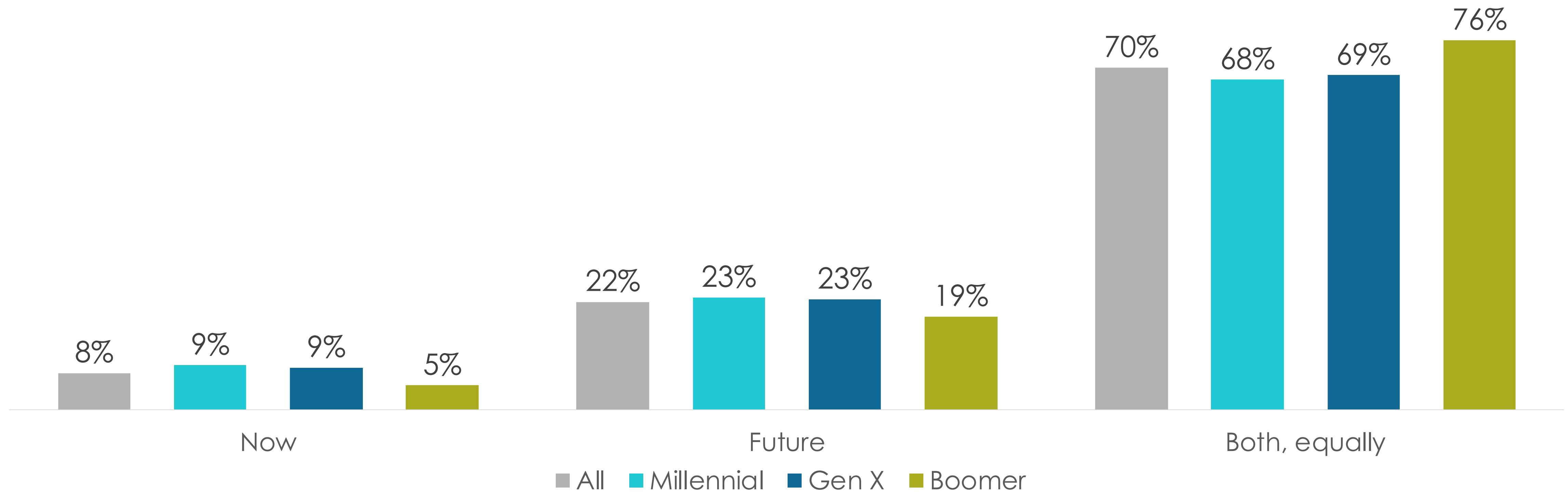
Current worry level



In general how worried are you right now?

70% of people are worried or very worried about both the present and the future.

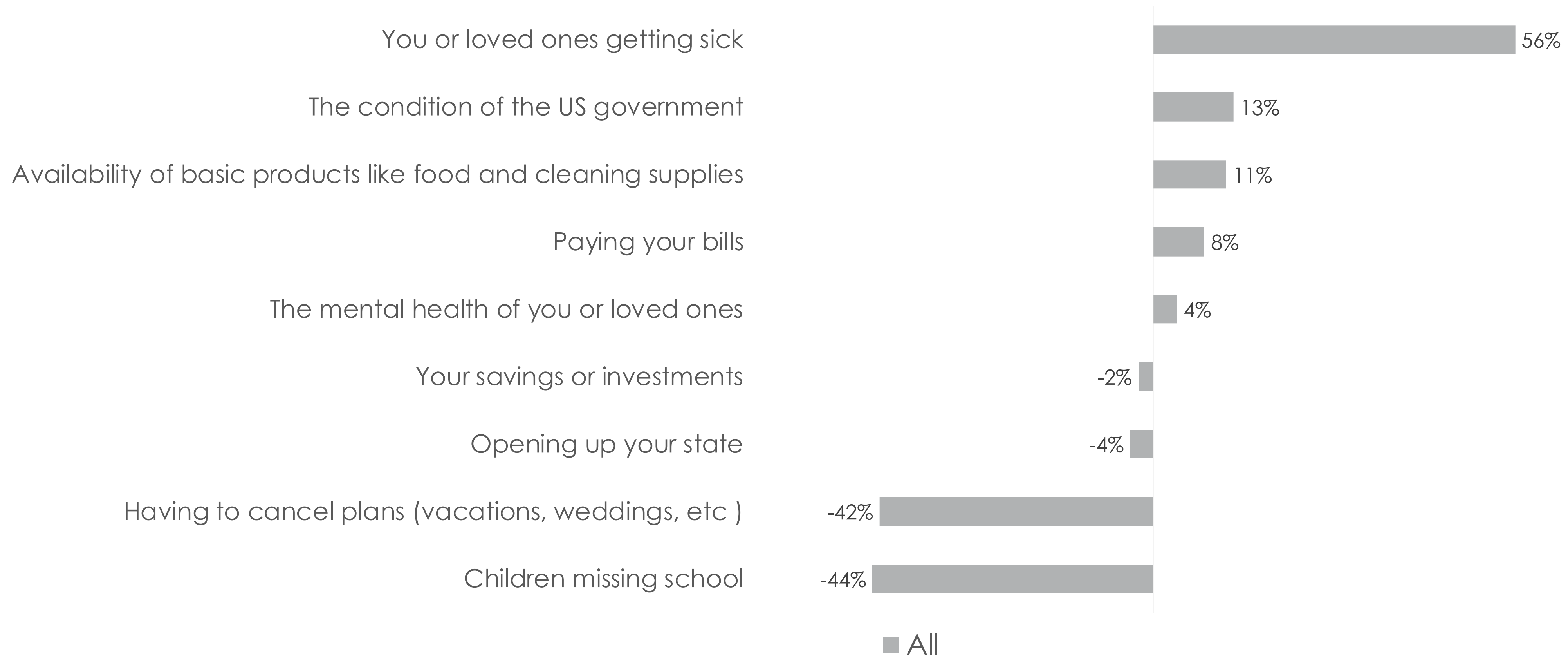
### Worry about the present vs. the future



Are you more worried about what's going on now or what might happen in the future?

The greatest current worry right now is the threat of getting sick (56%) followed by the condition of the government (13%) and the availability of basic products (11%).

Net worry = % selected as a top 3 worry minus % selected as a bottom 3 worry

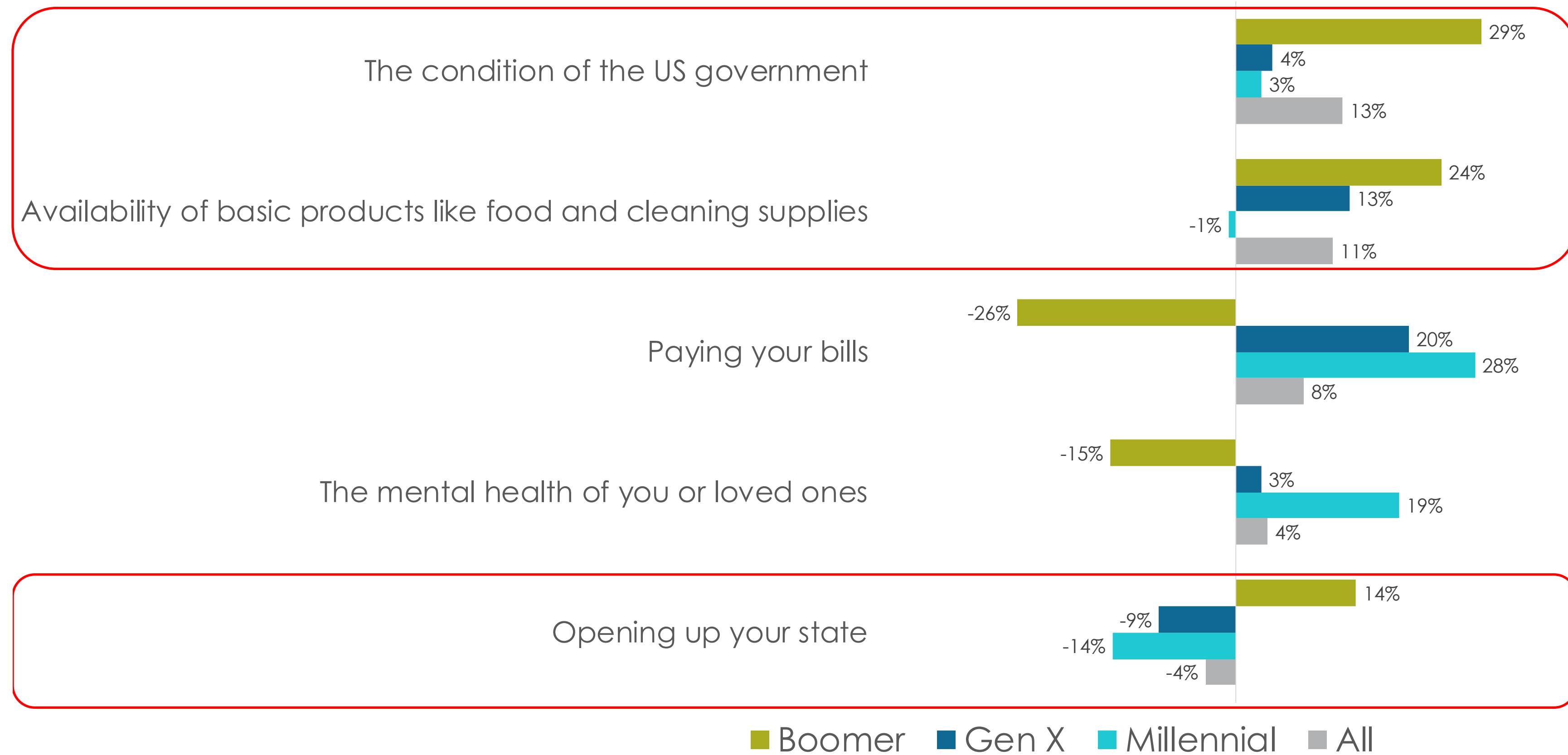


Which 3 of the following are you least worried about right now?

Which 3 of the following are you most worried about right now?

Right now, Baby Boomers are much more concerned about the state of the government, availability of basics and opening up their state compared to the other generations.

Net worry = % selected as a top 3 worry minus % selected as a bottom 3 worry

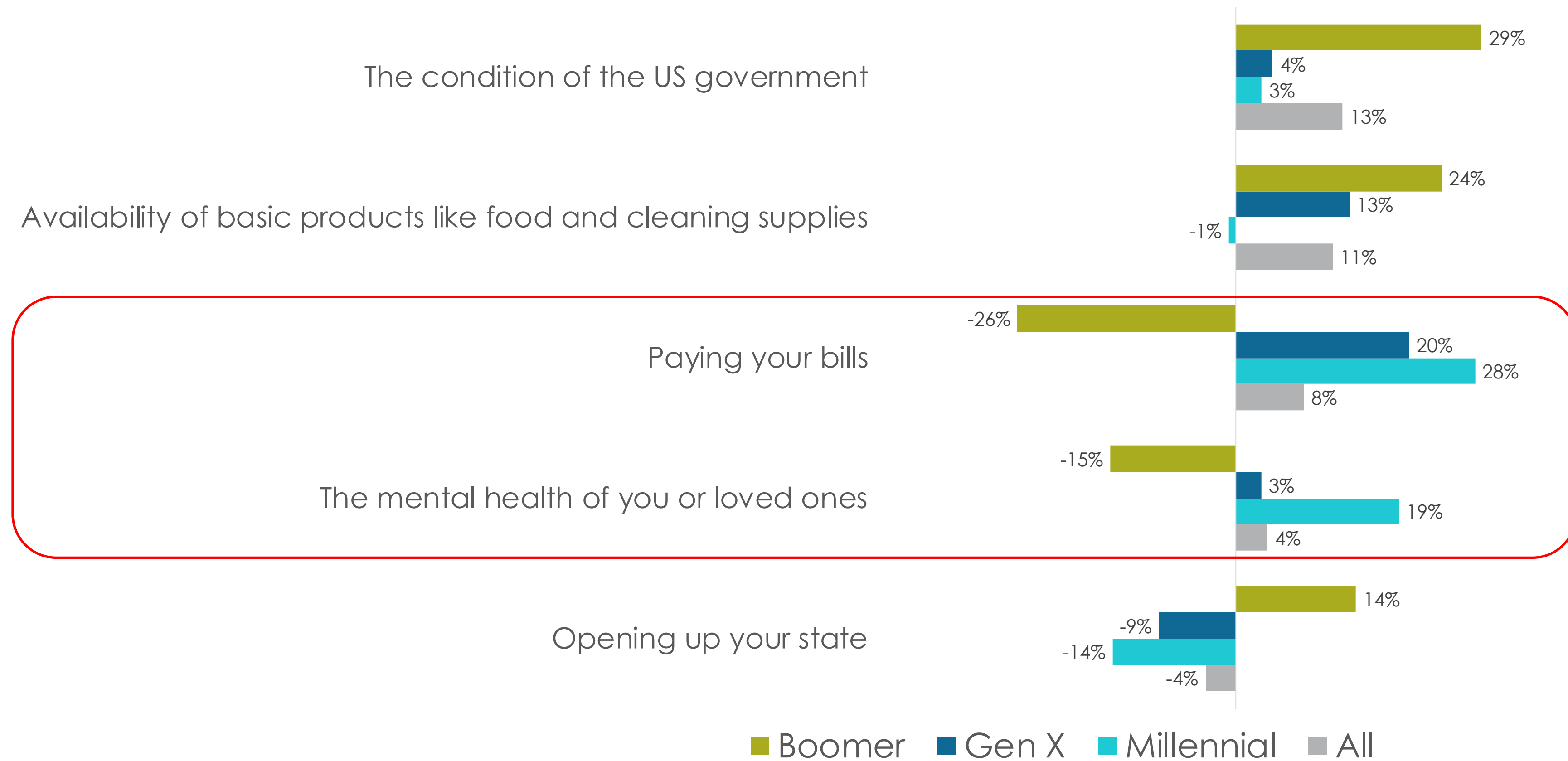


Which 3 of the following are you least worried about right now?

Which 3 of the following are you most worried about right now?

Conversely, GenX'ers and Millennials are much more concerned right now about getting their bills paid and the mental health aspects of the current environment.

Net worry = % selected as a top 3 worry minus % selected as a bottom 3 worry



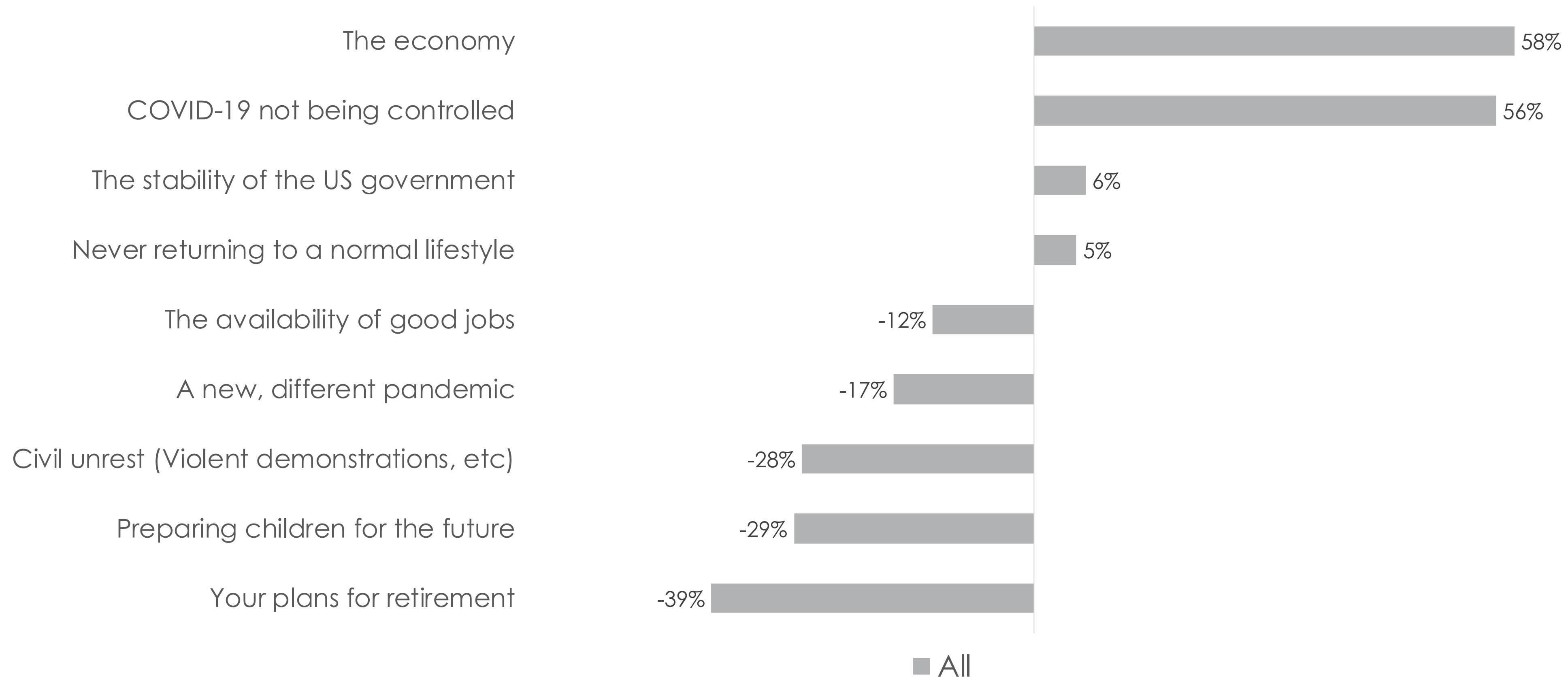
Which 3 of the following are you least worried about right now?

Which 3 of the following are you most worried about right now?



On a long-term basis, the 2 greatest concerns with net scores over 50% are the economy and the ability to control COVID-19.

Net worry = % selected as a top 3 worry minus % selected as a bottom 3 worry

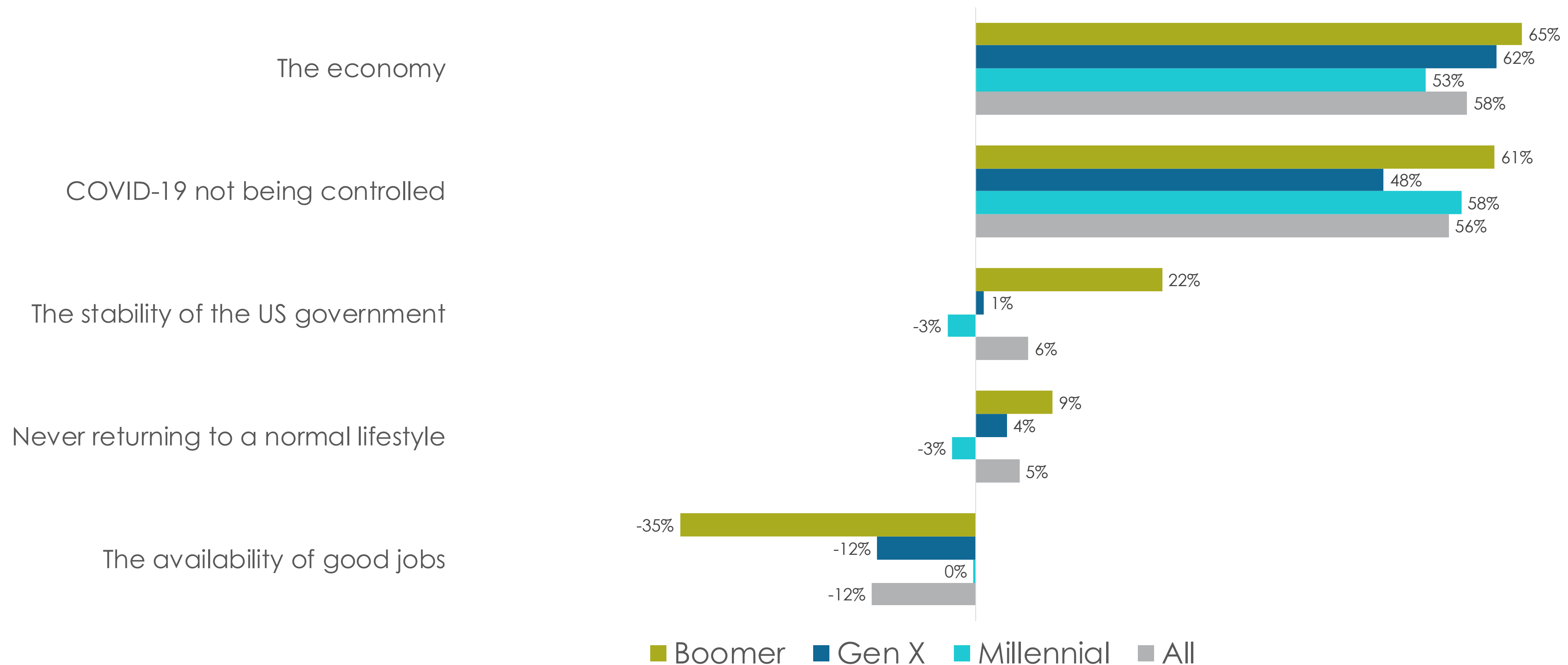


Which 3 of the following are you least worried about for the future?

Which 3 of the following are you most worried for the future?

In contrast to the generational bias seen in the near-term worries, all three generations share the two major concerns for the future.

Net worry = % selected as a top 3 worry minus % selected as a bottom 3 worry



Which 3 of the following are you least worried about for the future?

Which 3 of the following are you most worried for the future?

# Summary

By and large consumer sentiment is not changing dramatically, but there are subtle shifts occurring.

- In each of the last two weeks there has been a slight decline in the percentage of people who feel they have been impacted by COVID-19.
- Concern levels about the virus remain consistently in the 75% range.
- There has been a 5-percentage point increase in people's confidence in the steps they're taking to protect themselves.
  - The increase may in part be a function of increased measures. The % of people never wearing a mask in public has dropped from nearly 1 in 4 (23%) to 1 in 6 (17%) in just one week.
- Confidence in the government has not improved.
  - Only 44% believe the government is keeping us well informed.
  - And, only about one-third feel the government is adequately prepared to handle the situation.
  - Confidence in the local medical community's ability to cope with the virus has improved, topping 50% for the first time.

# Summary

Expectations continue to shift. Things that should be getting closer are in fact shifting further out.

- The average timeframe for the expected development of a vaccine is now 13.3 months, up from 10.5 months seven weeks ago.
- Compared to March 3<sup>rd</sup> data, 46% fewer respondents feel the virus will just go away while twice as many feel it will remain at epidemic levels for years.
- There has been a shift in the timeframe in which people expect a return to normalcy.
- Respondents still feel people's well-being should outweigh the need to reactivate the economy.
- Despite it being touted as a key element in the fight against COVID-19, 43% of respondents don't feel the government has the right to track their movement via their smartphone.

As would be expected the worry level related to Coronavirus is high (58% are worried or very worried).

- 70% of people are worried both about the present and the future.
- By far the greatest short-term concern is getting infected or having a loved one being infected.
- Short-term concerns vary dramatically by generation with Boomers focused on the condition of the government and availability of basics while the other generations are concerned about paying bills and mental health issues.
- The primary long-term concerns of COVID-19 not being controlled and the economy are shared across generations.