



COVID-19 U.S. CONSUMER IMPACT TRACKING STUDY – WEEK 27

PRESENTED SEPTEMBER 9, 2020

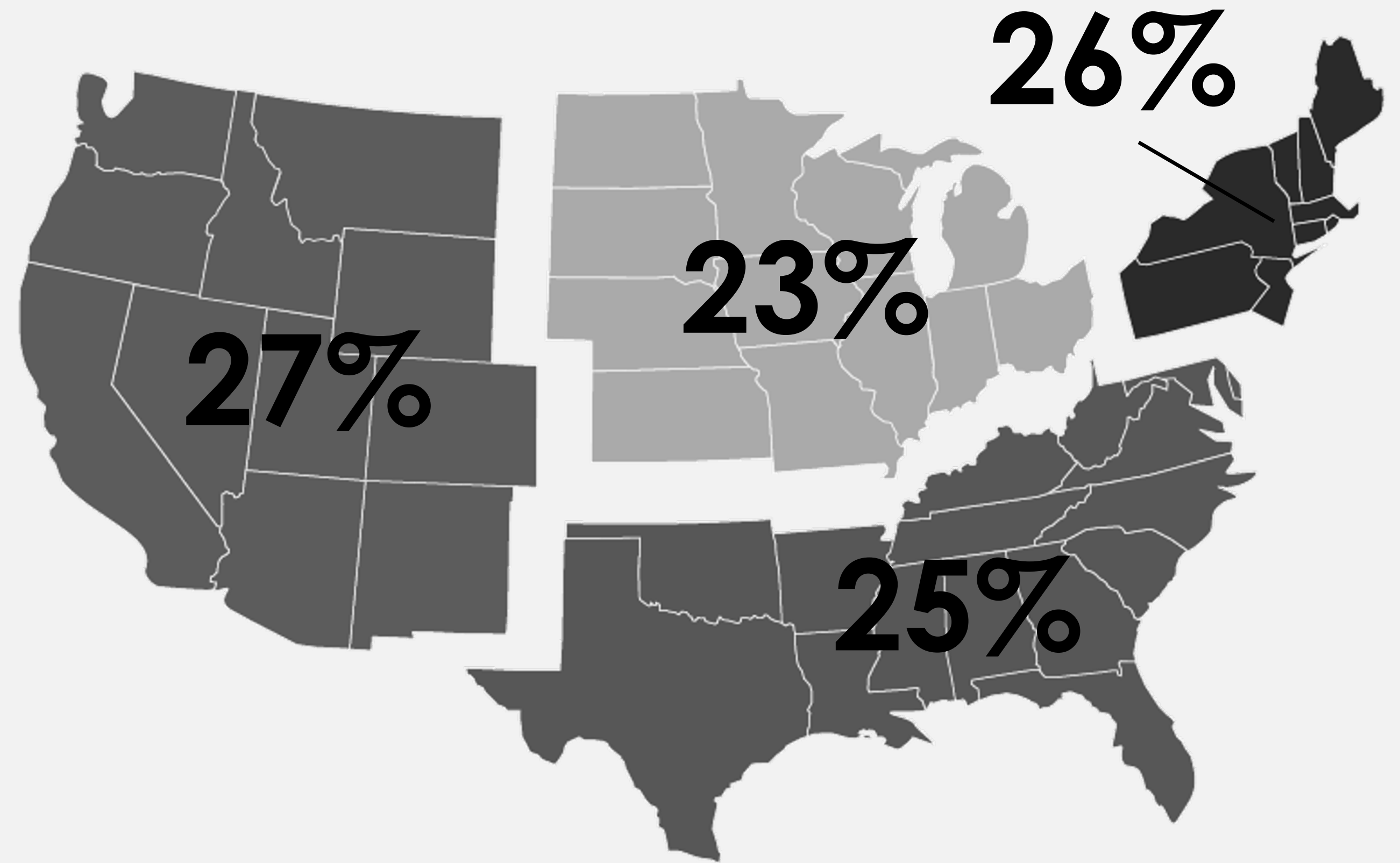
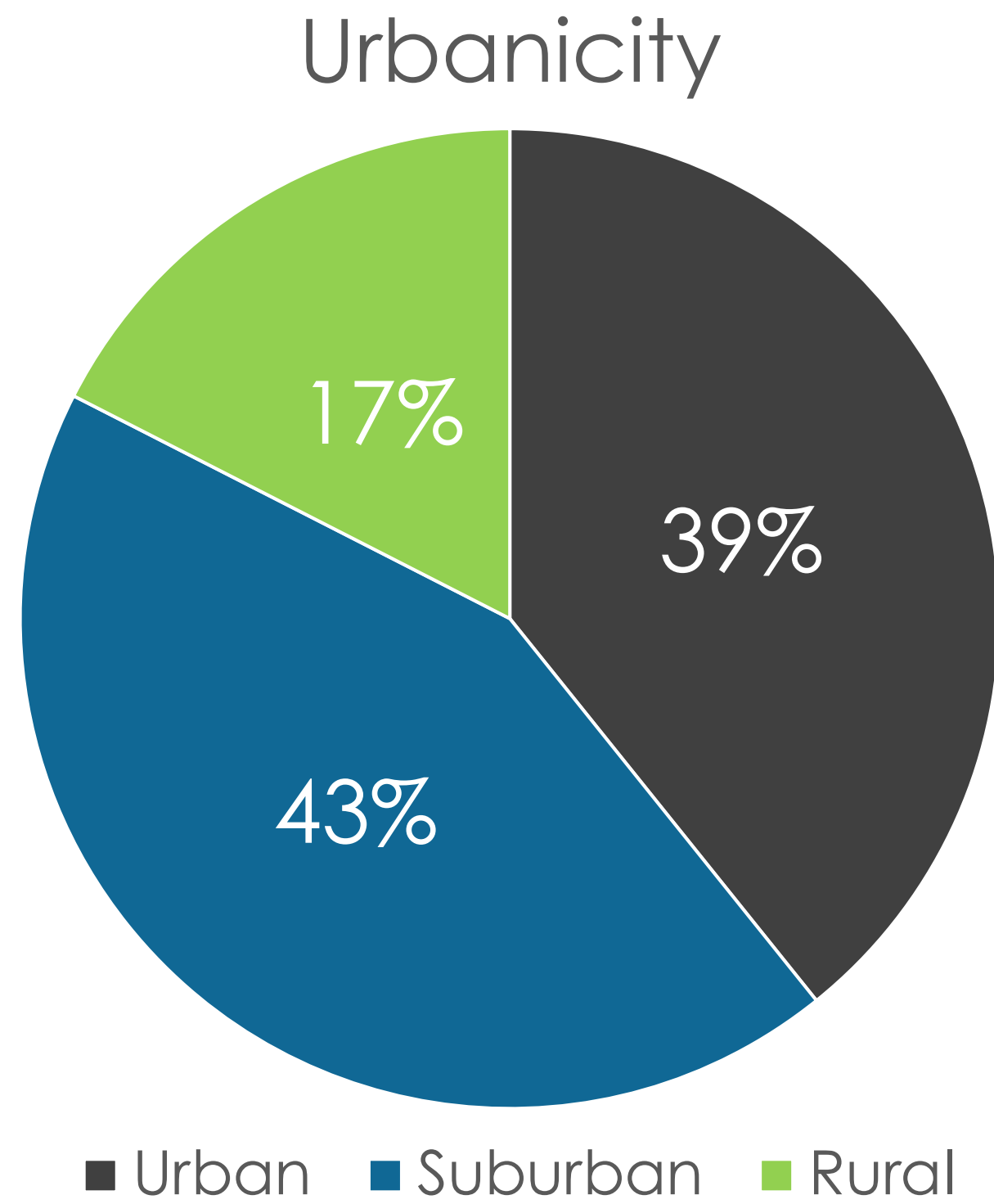
Methodology

- N = 1,012
- MOE = $\pm 3.08\%$
- Panel: General Population
- Collected: 08/27/20, 08/28/20

- N = 503
- MOE = $\pm 4.37\%$
- Panel: General Population
- Collected: 09/03/20, 09/04/20

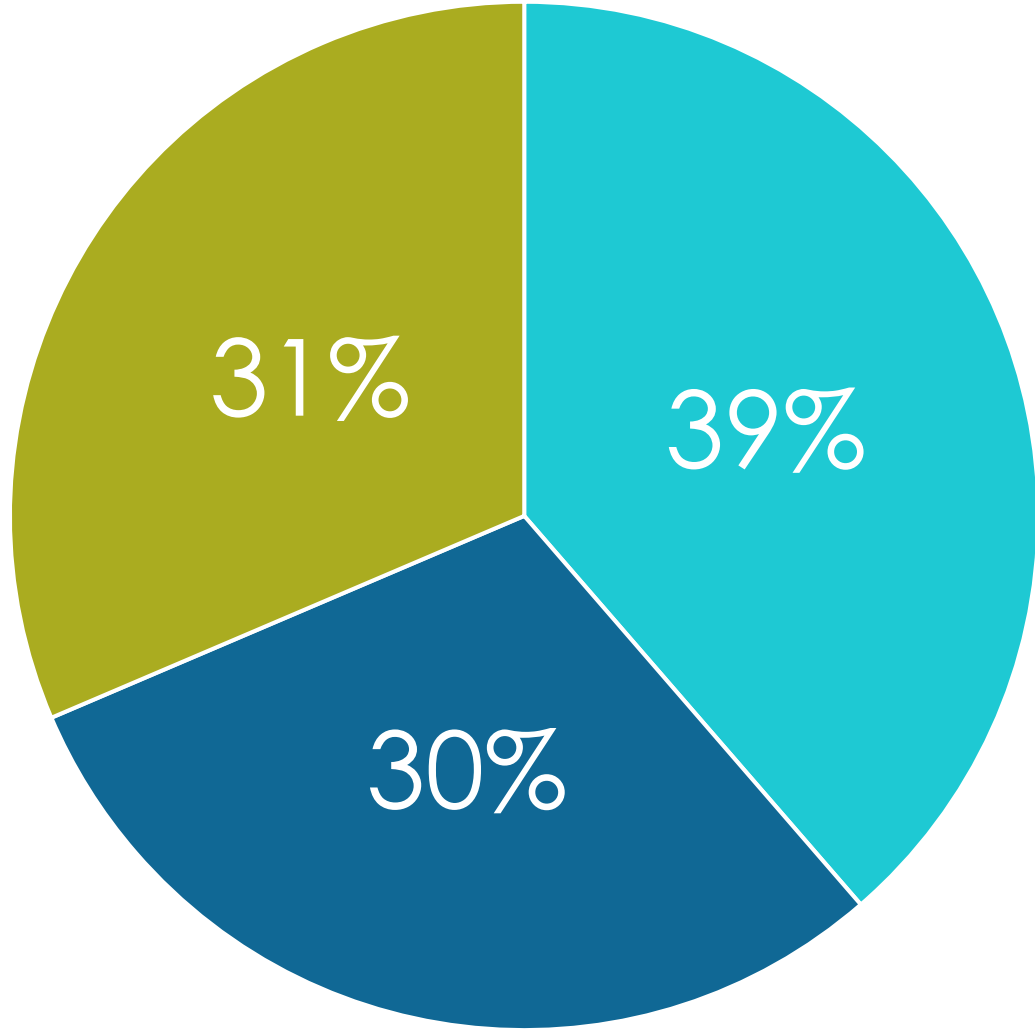


Panel composition



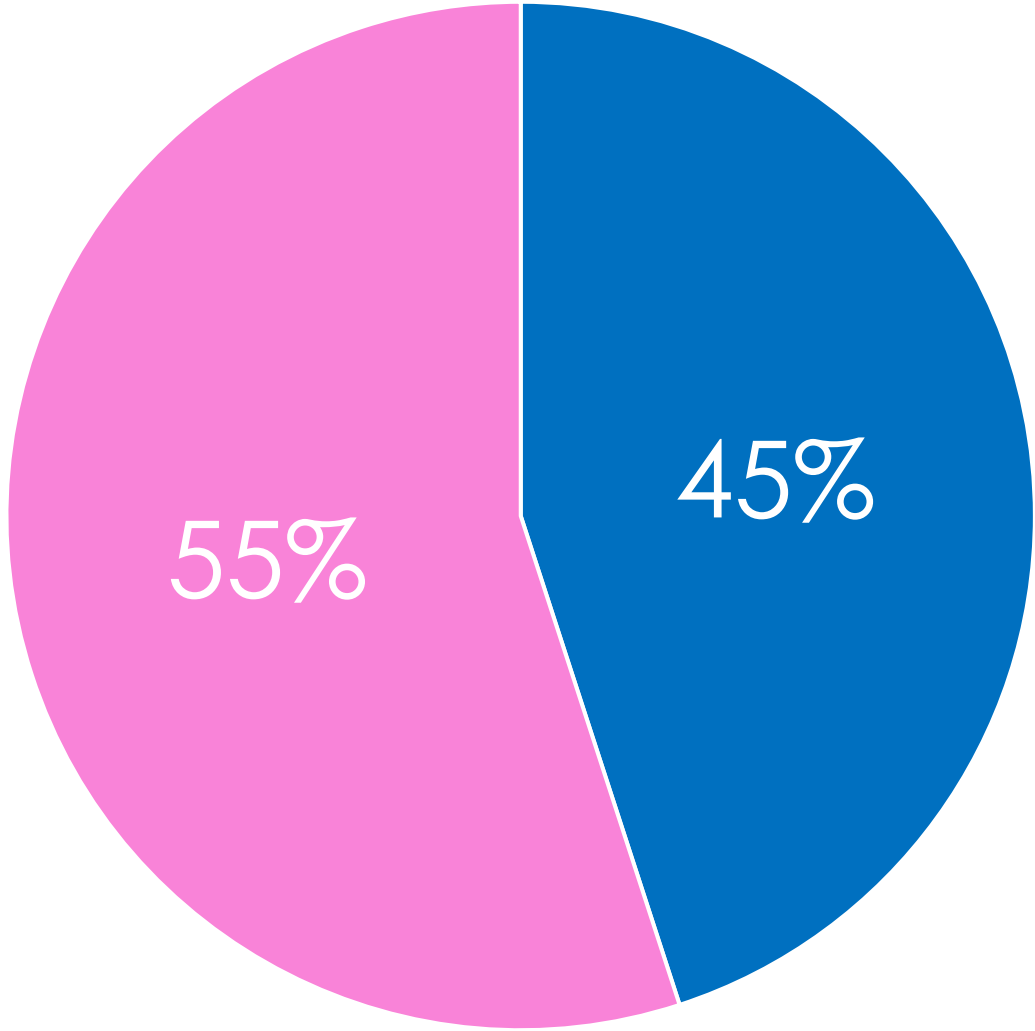


Generation




■ Millennial ■ Gen X ■ Boomer

Gender



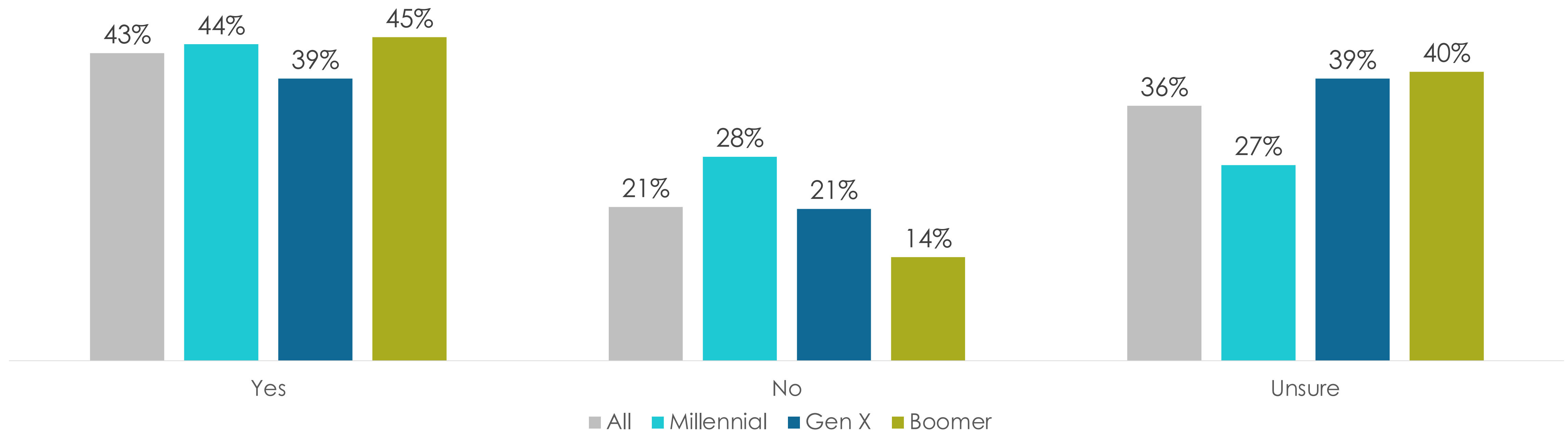
■ Male ■ Female



COVID-19 – Hot Topics

Only 43% of respondents are sure they'll get a COVID vaccine when it becomes available.

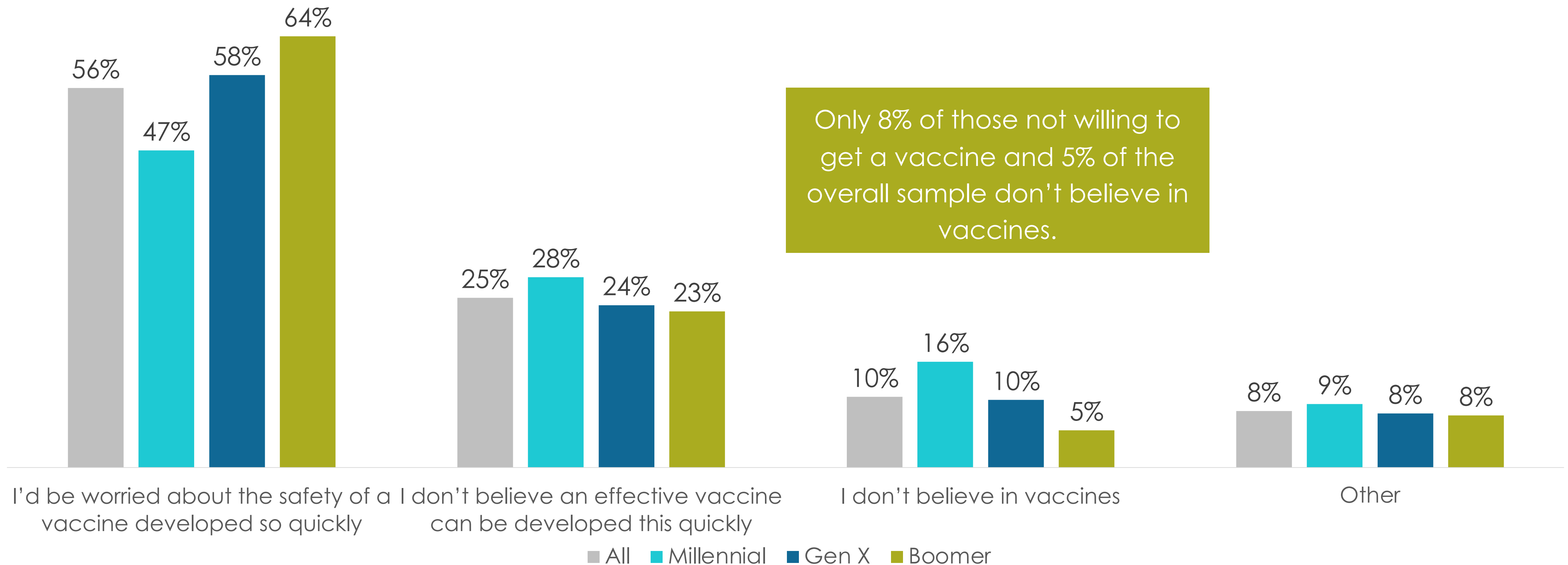
Will get Coronavirus vaccine when available



Will you get a COVID vaccine if one becomes available?

Among those opposed to or unsure of the COVID vaccine, the majority (56%) are concerned about the safety of a vaccine developed so quickly.

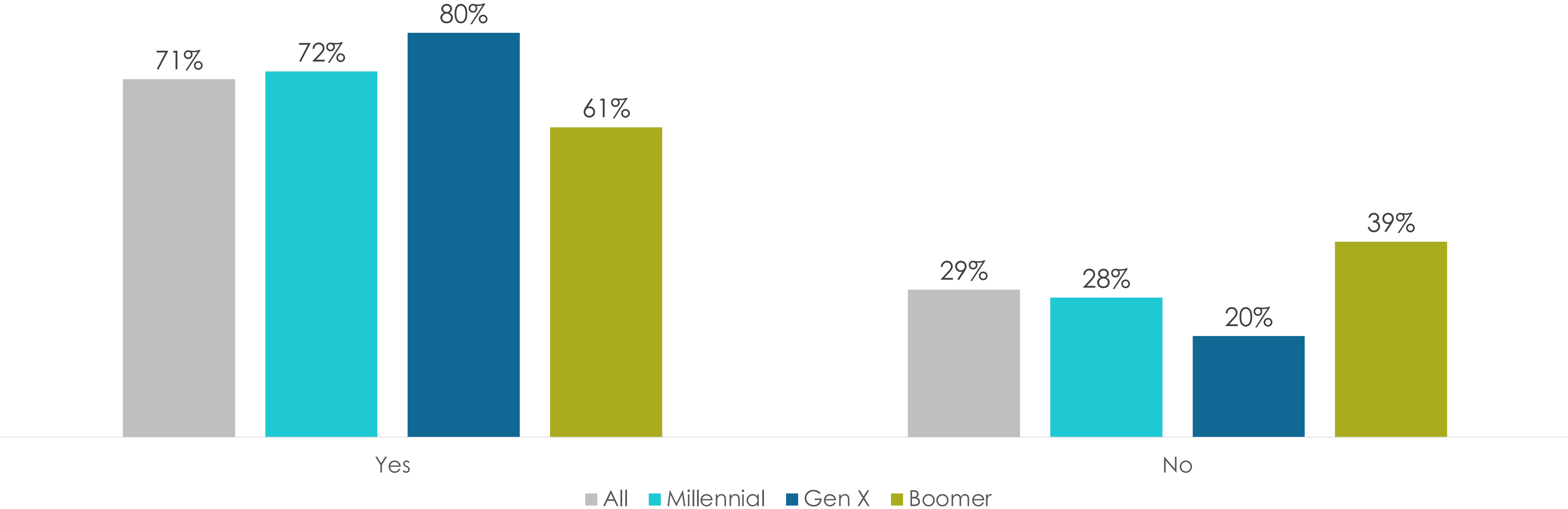
Reasons for being against/unsure about Coronavirus vaccines



Which of the following best describes why you are against or unsure about a COVID vaccine?

Of those planning to get the vaccine, 71% feel the government should make it mandatory.

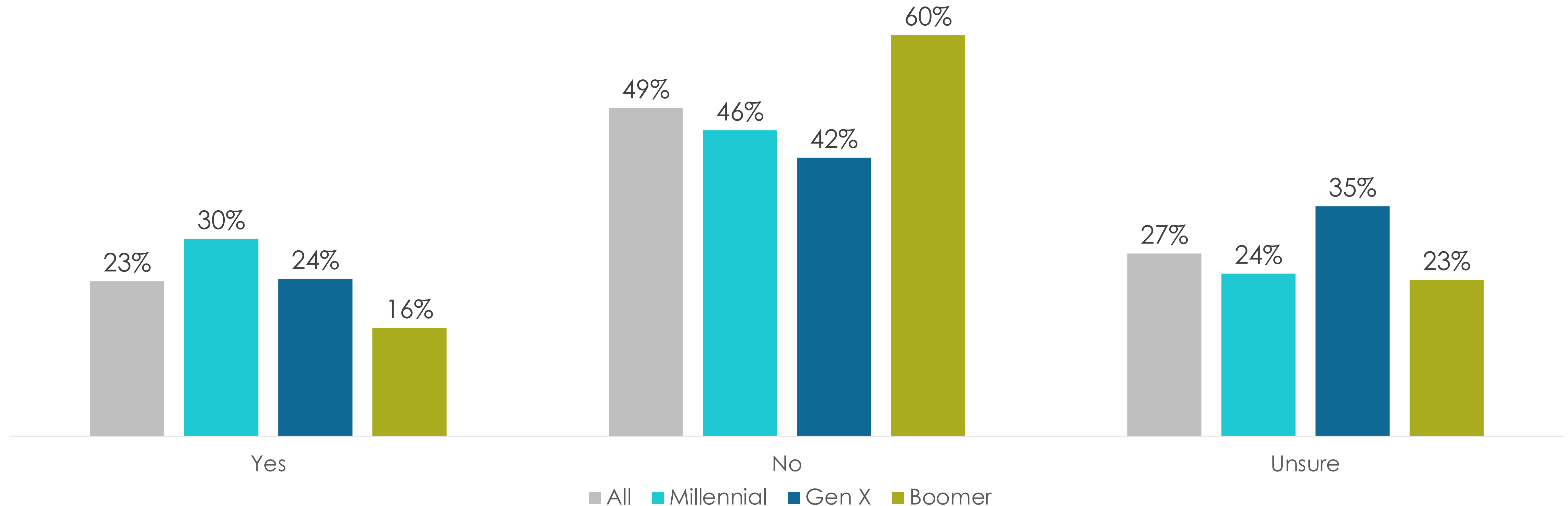
Should the government require Coronavirus vaccines



Do you think the government should require everyone to get a COVID vaccine if one becomes available?

50% of respondents believe the FDA/CDC are or may be taking steps to slow the development of a COVID vaccine.

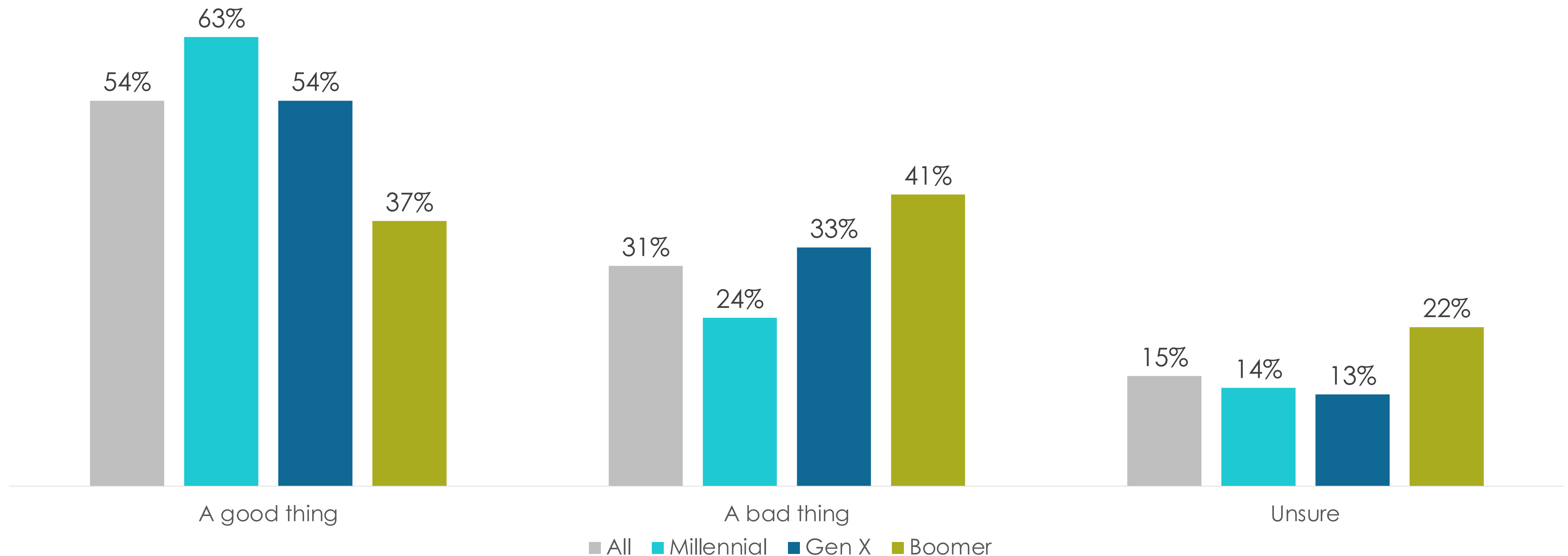
Think the FDA and CDC are deliberately taking steps to slow development of Coronavirus vaccine



Do you think the FDA or CDC is deliberately taking steps to slow the development of a COVID vaccine?

Of those 50% of respondents who believe the FDA and CDC are or may be deliberately taking steps to slow the development, 54% think that it is a good thing.

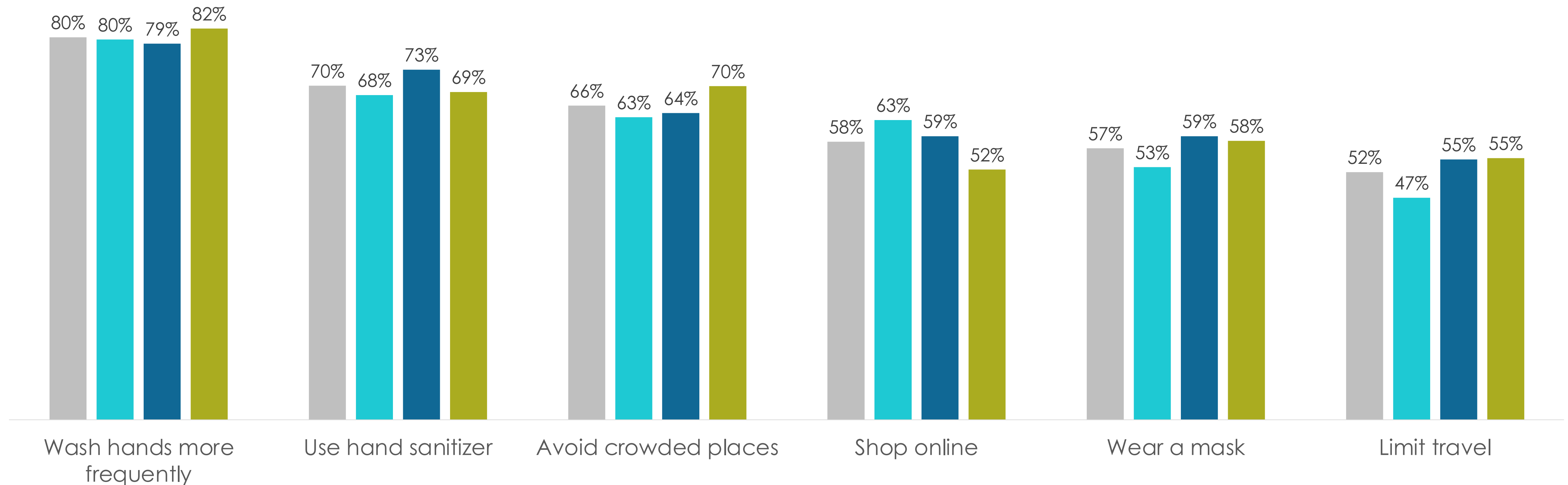
Slow development of CV vaccine: good or bad?



Do you think it is a good thing or a bad thing that the FDA or CDC is deliberately taking steps to slow the development of a COVID vaccine?

Given lessons learned from protecting themselves from COVID, many people plan to continue the steps they've taken to protect themselves into the post-COVID world.

Likely to take the following precautions to protect health once Coronavirus is brought under control

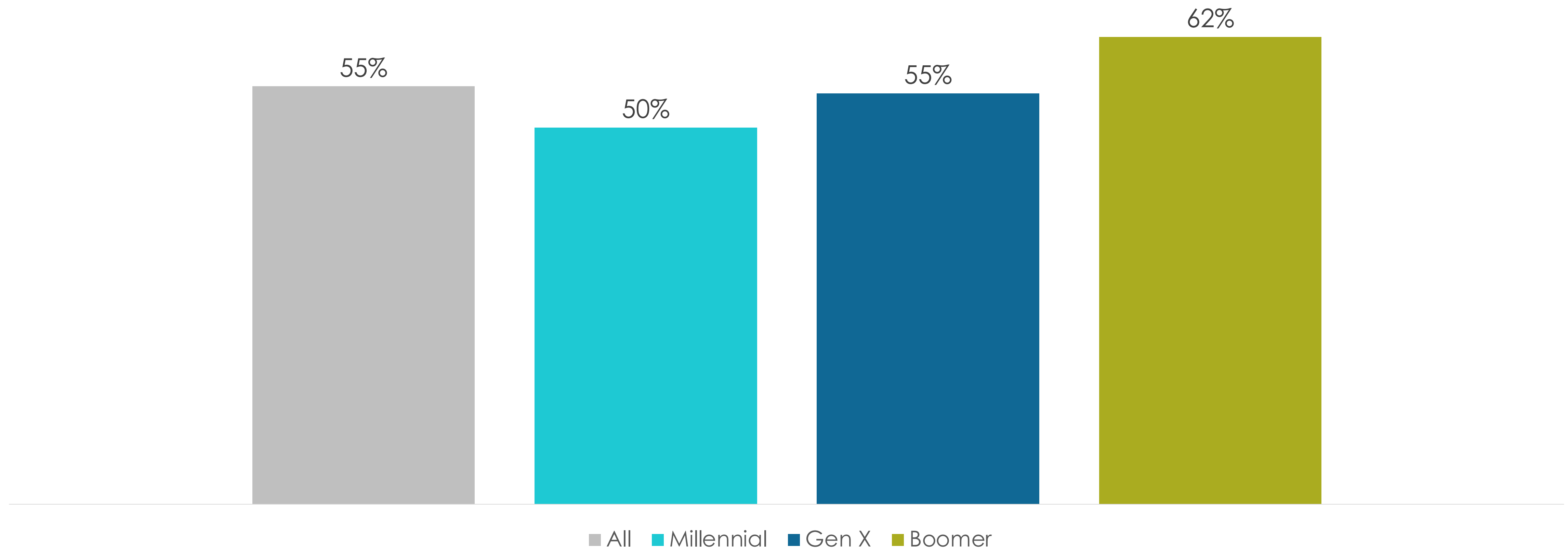


■ All ■ Millennial ■ Gen X ■ Boomer

Once COVID-19 is brought under control, how likely is it that you'll do the following things to protect yourself from another potential pandemic or more common problems like colds or the flu?

Despite the prevalence of COVID and concerns about it overlapping the flu season, only 55% of respondents plan on getting a flu shot this year.

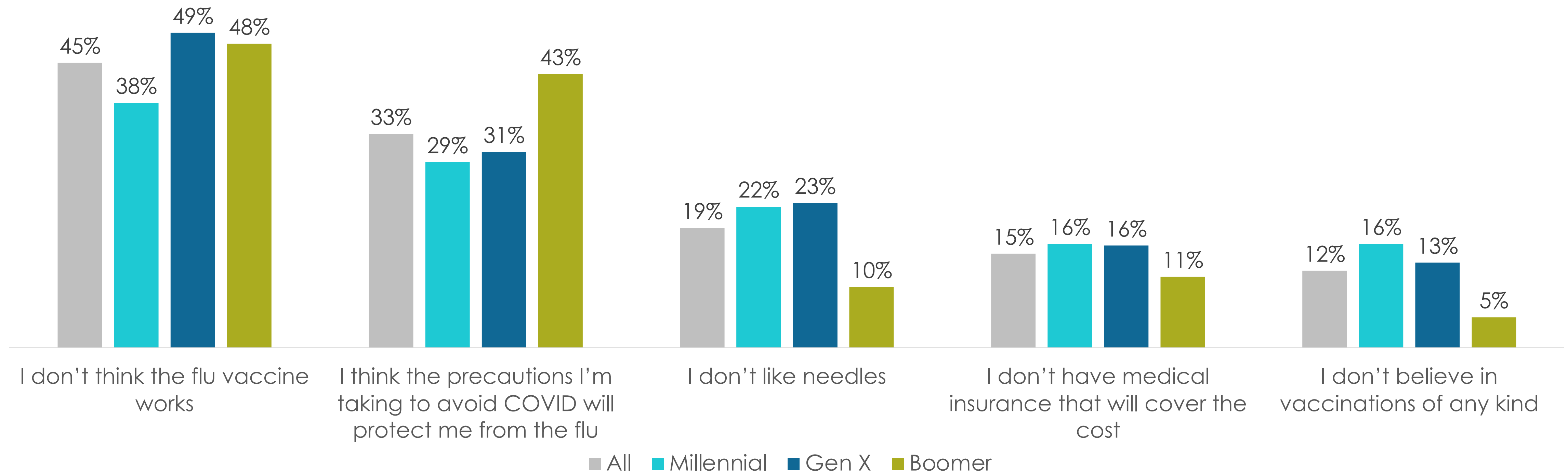
Those who received or plan to get a flu shot this year



Have you received or do you plan to get a flu shot this year?

Among the 45% who don't plan on getting a flu shot this year, the primary reasons are: a lack of confidence in the vaccine (45%), confidence in the protection they'll receive from their Coronavirus precautions (33%) and a fear of needles (19%).

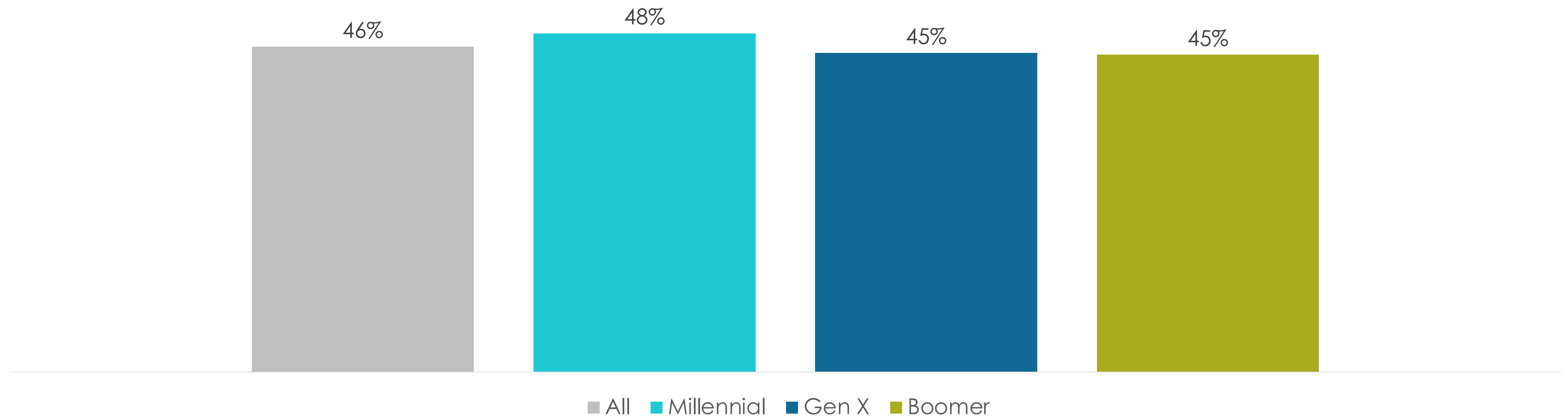
Reasons for not getting a flu shot this year



Why won't you be getting a flu shot this year? Select all that apply.

In all, 46% of respondents feel that the collective protections society is taking to protect against COVID will result in a milder flu season.

Those that believe the precautions taken to protect from the Coronavirus will result in a milder flu season



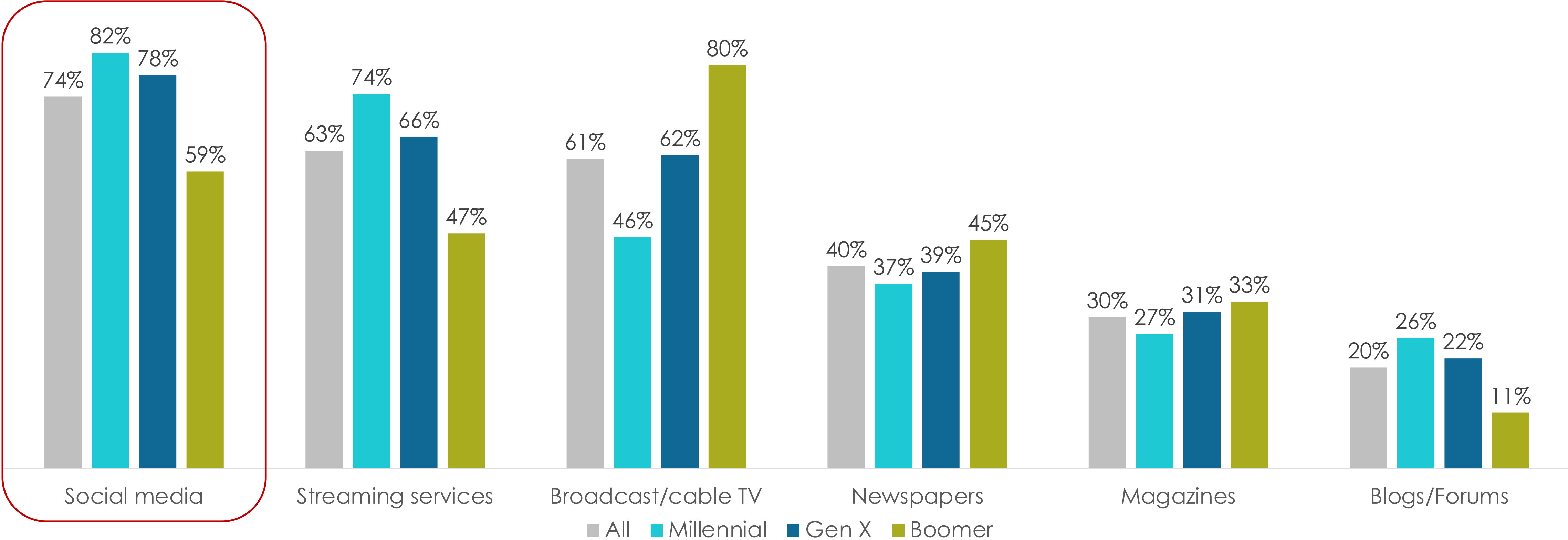
How likely do you think it is that the precautions we're taking to protect ourselves from COVID-19 will result in a much milder flu season this winter?

A grayscale photograph of a stack of newspapers on the left and a laptop keyboard on the right. The background is a soft, out-of-focus gradient of colors. The text 'Election Impact on Media Consumption' is overlaid in white, centered horizontally.

Election Impact on Media Consumption

Social media (74%) and streaming services have surpassed broadcast and cable TV in popularity among all but Boomers, who continue to utilize traditional media formats.

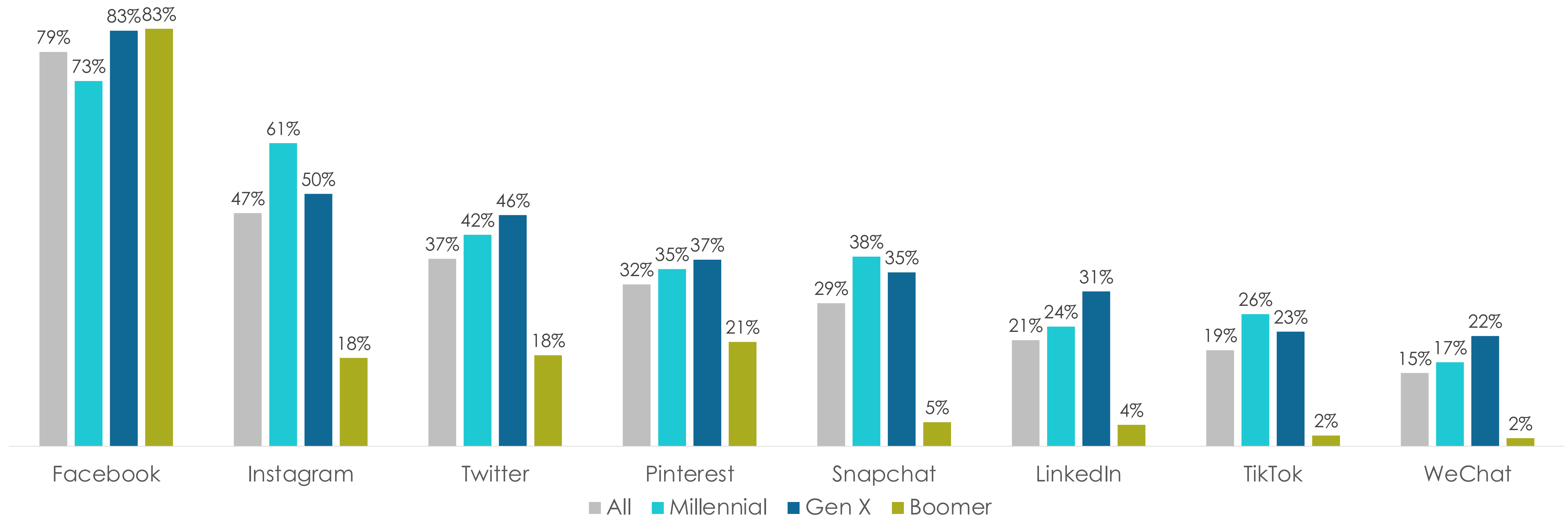
Media use



Which of the following media do you use? Select all that apply.

Facebook remains the most popular social media platform (79%), but one-third or more of GenXers and Millennials are using Instagram, Twitter, Pinterest and Snapchat.

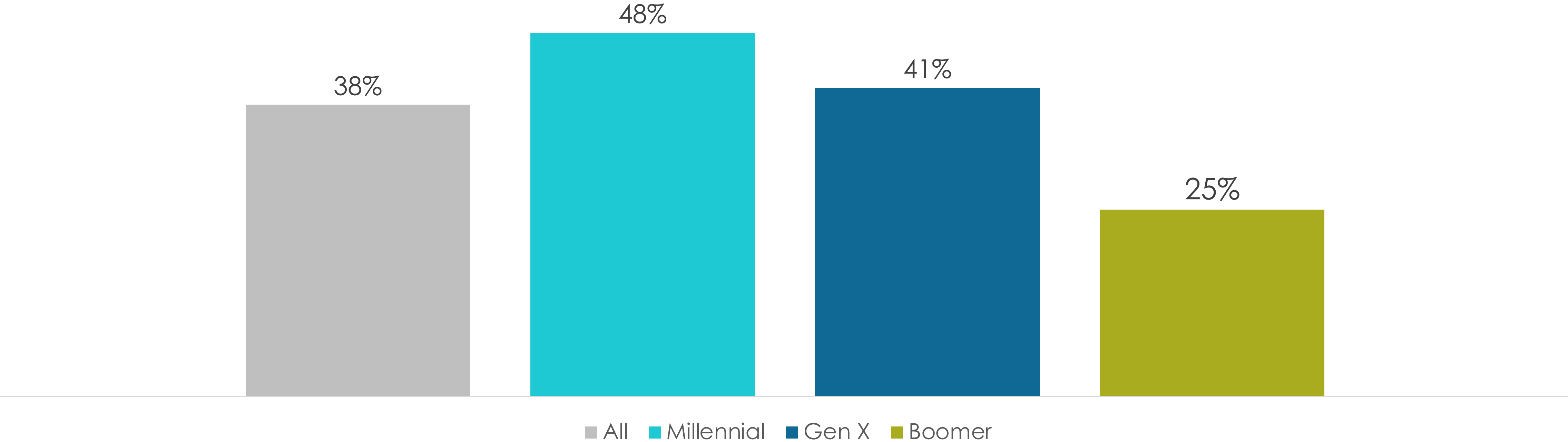
Frequency of using social media platforms



How frequently do you use the following social media?

38% of respondents expect their media consumption to change as a result of the desire to pursue election news and/or opinions.

Those who expect time spent on media to change due to result election news/opinions

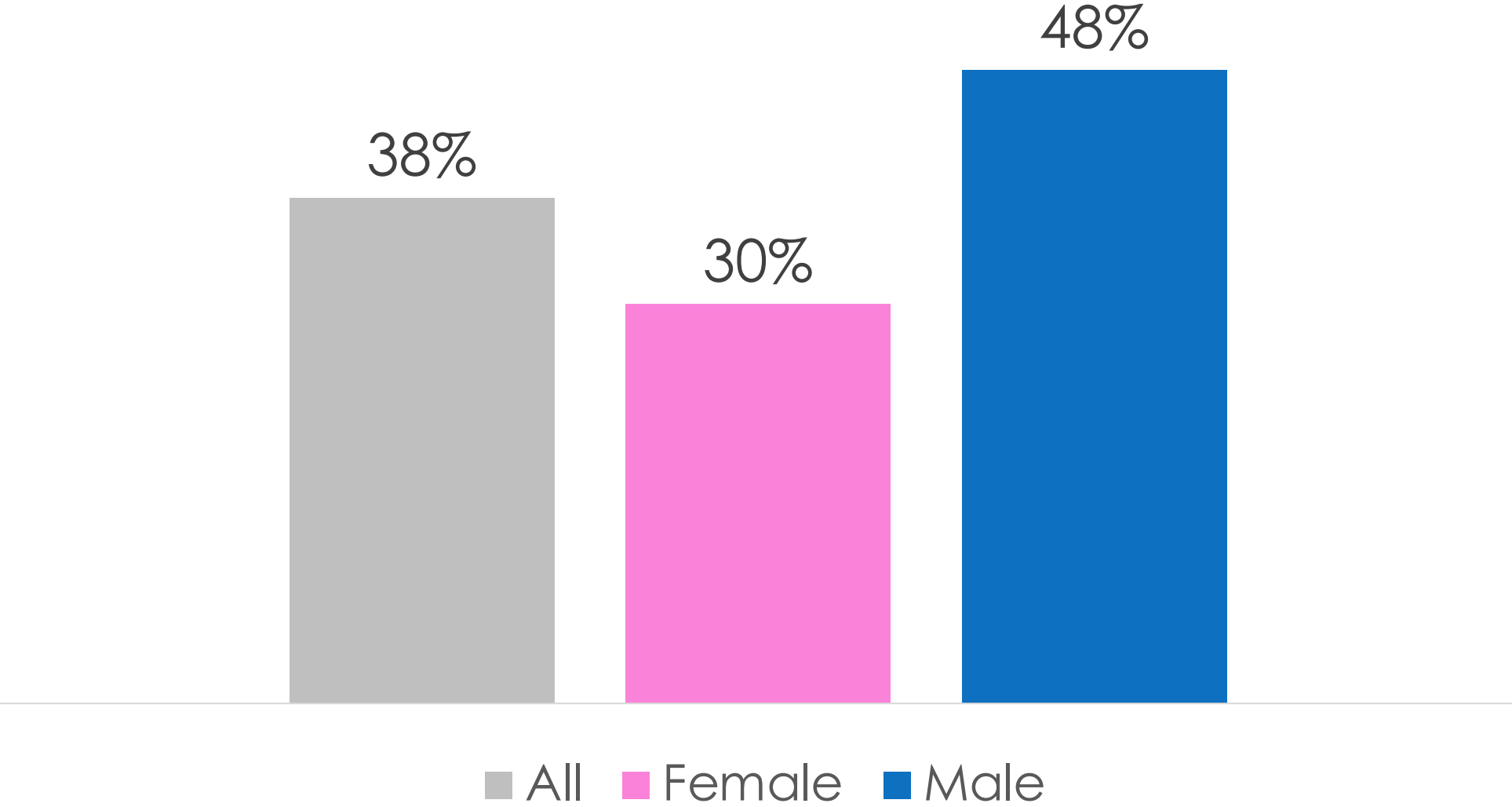


Do you expect the amount of time you spend on various media to change as a result of all the election news and opinions?



The expected increase in consumption is significantly higher among men (48%) than among women (30%).

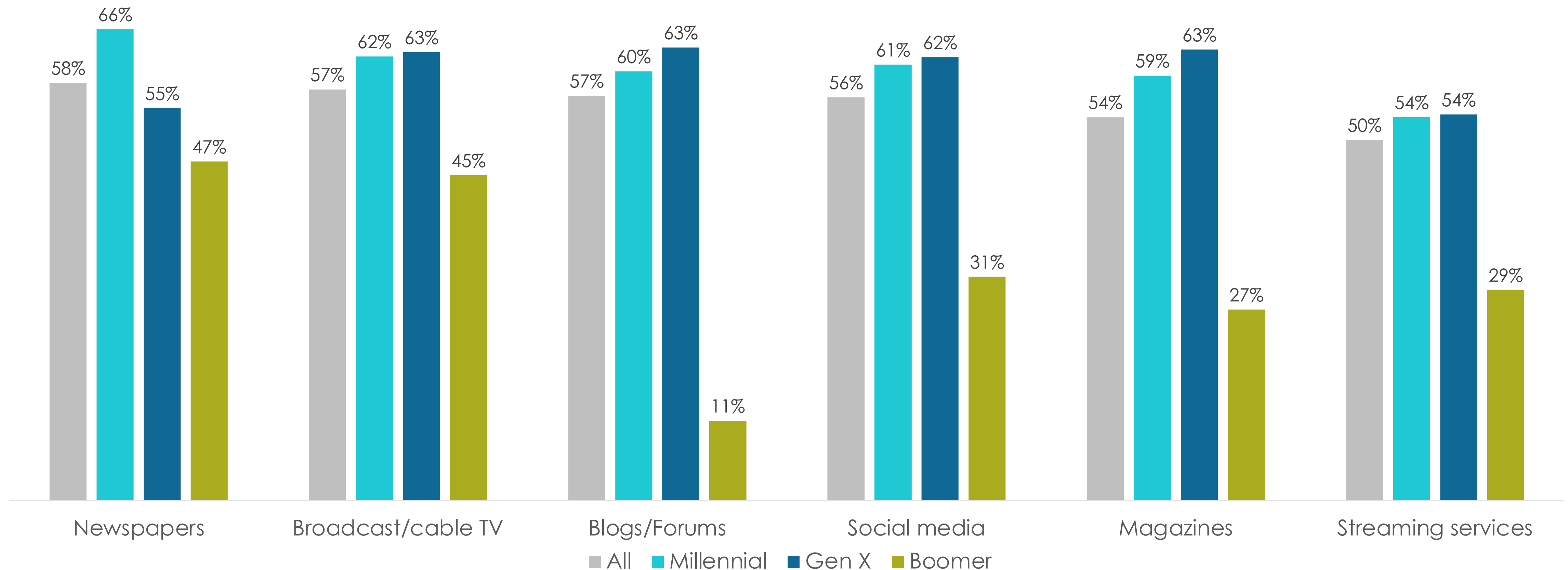
Those who expect time spent on media to increase due to result election news/opinions



Do you expect the amount of time you spend on various media to change as a result of all the election news and opinions?

All media types will benefit from increased consumption. Newspapers will increase among 58% and broadcast and cable TV will increase among 57%.

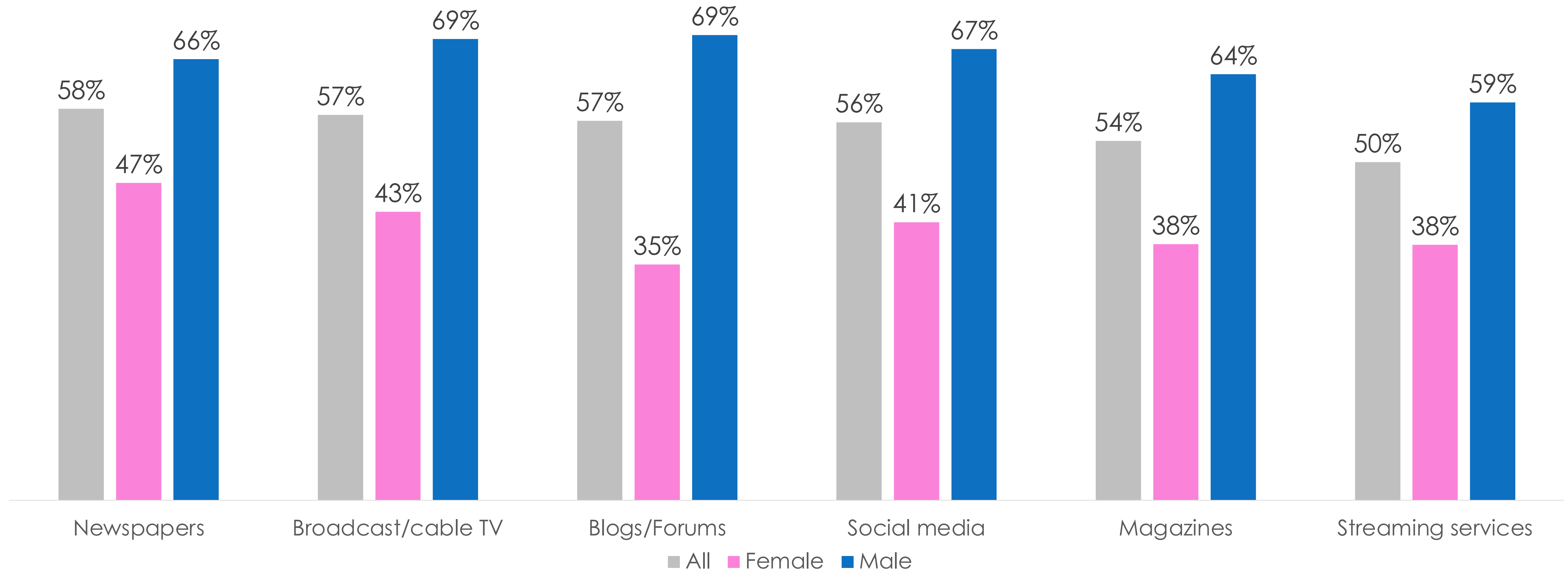
Those who expect to increase the use of media due to result election news/opinions:



How do you think your use of the following media will change as a result of all the election news and opinions?

Not only are men more likely than women to be increasing their total media consumption as a result of the elections, they're significantly more likely to increase consumption across all platforms.

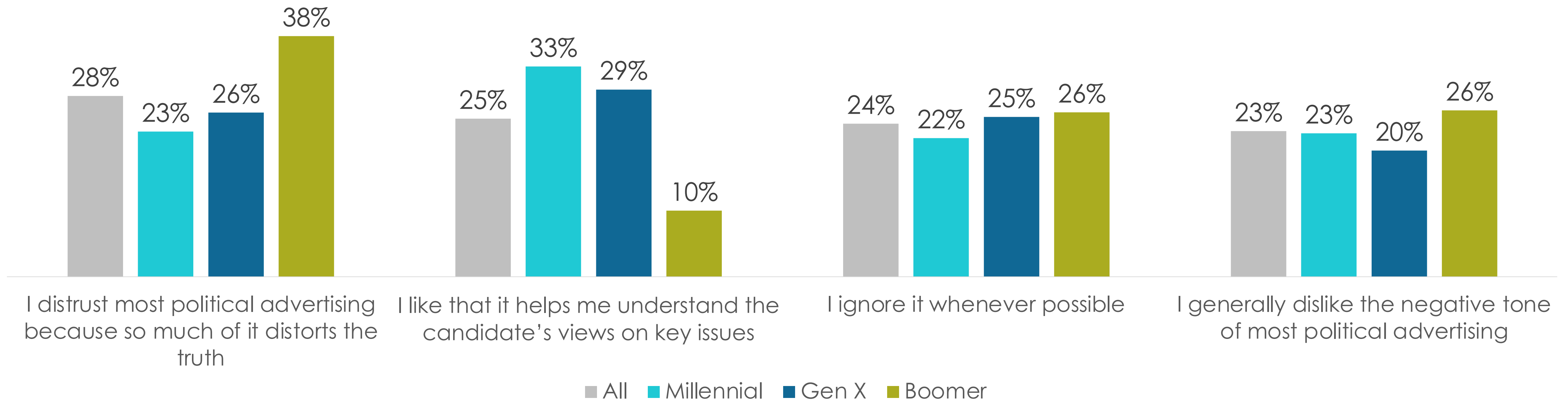
Those who expect to increase the use of media due to result election news/opinions:



How do you think your use of the following media will change as a result of all the election news and opinions?

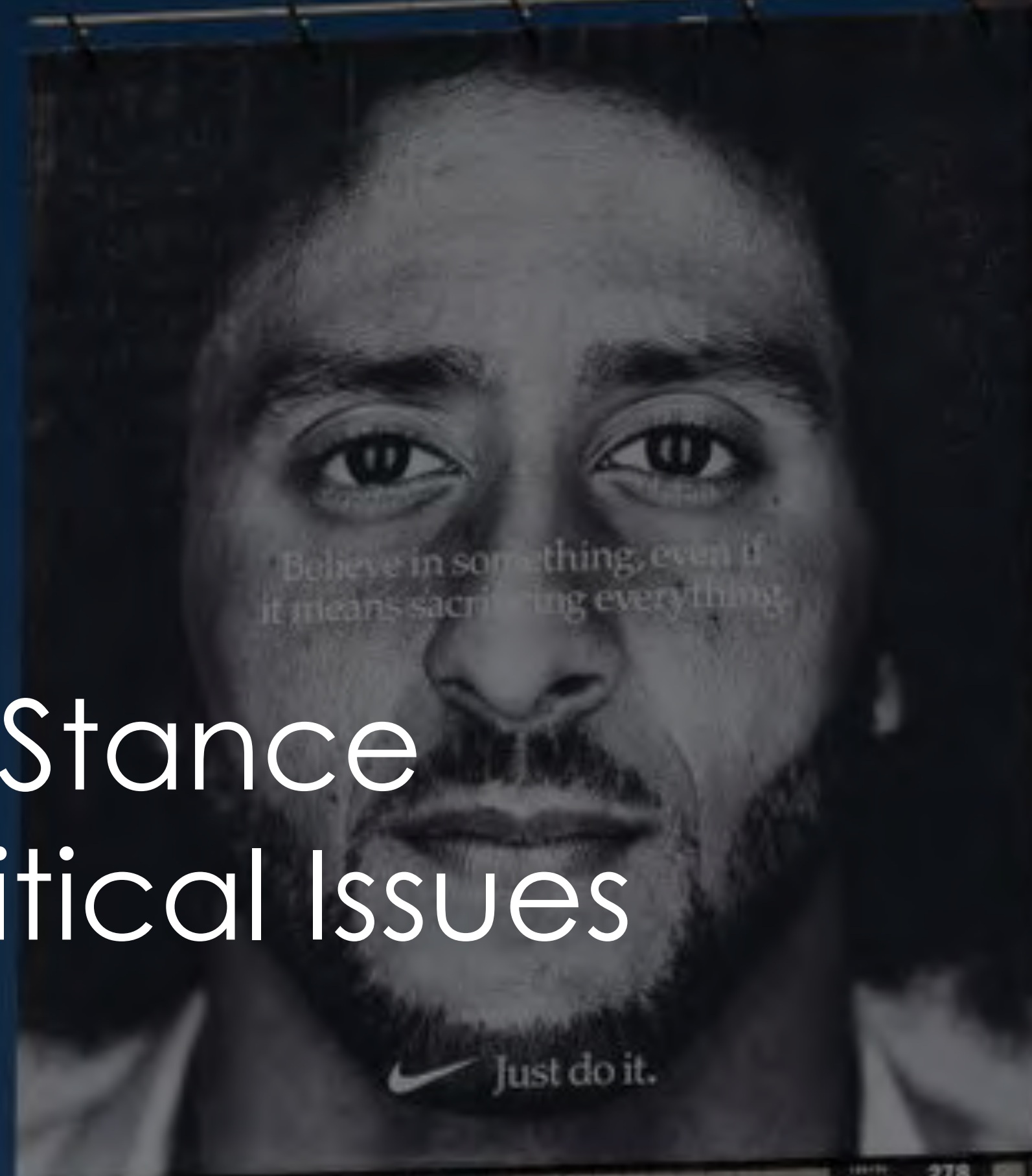
While the elections are driving an increase in media consumption, it is clearly not a desire to see political advertising. Only 25% of respondents feel they add value in helping them understand candidates' views.

Opinion on political advertising



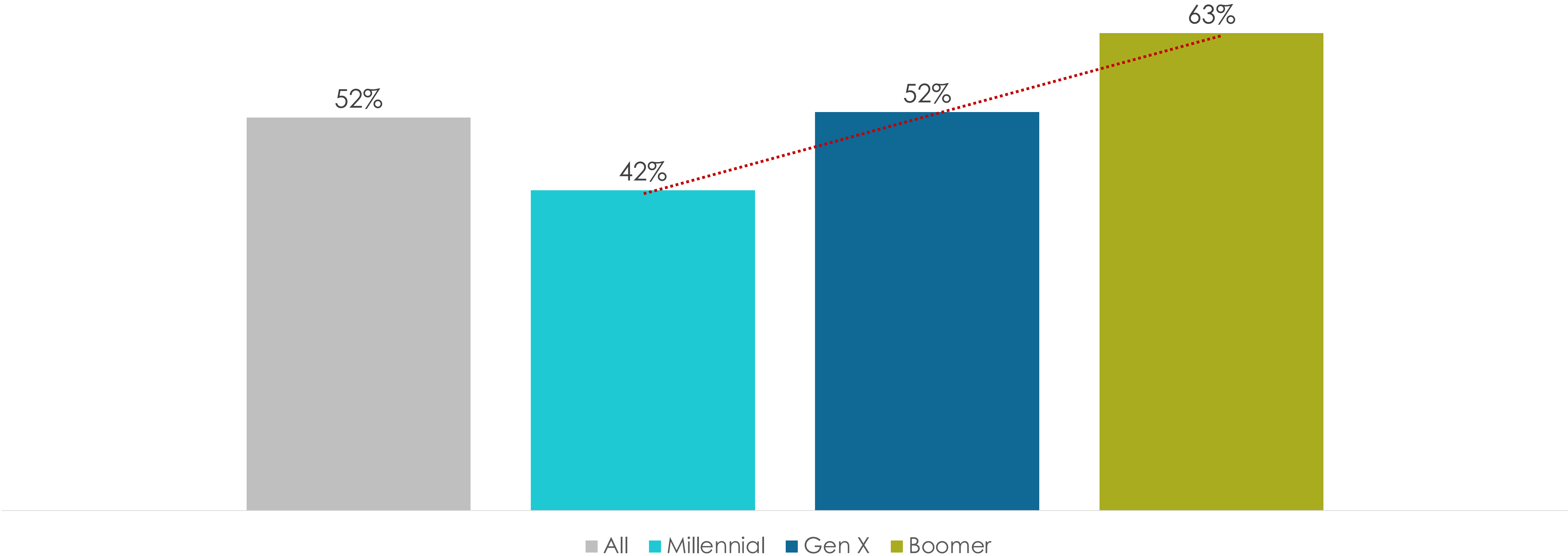
Which of the following best describes your opinion of political advertising?

Opinion of Brand Stance on Social and Political Issues



The question of whether companies should take a stand on political and/or social issues is a contentious one, with the population split almost evenly. 48% feel brands should weigh in while 52% think not.

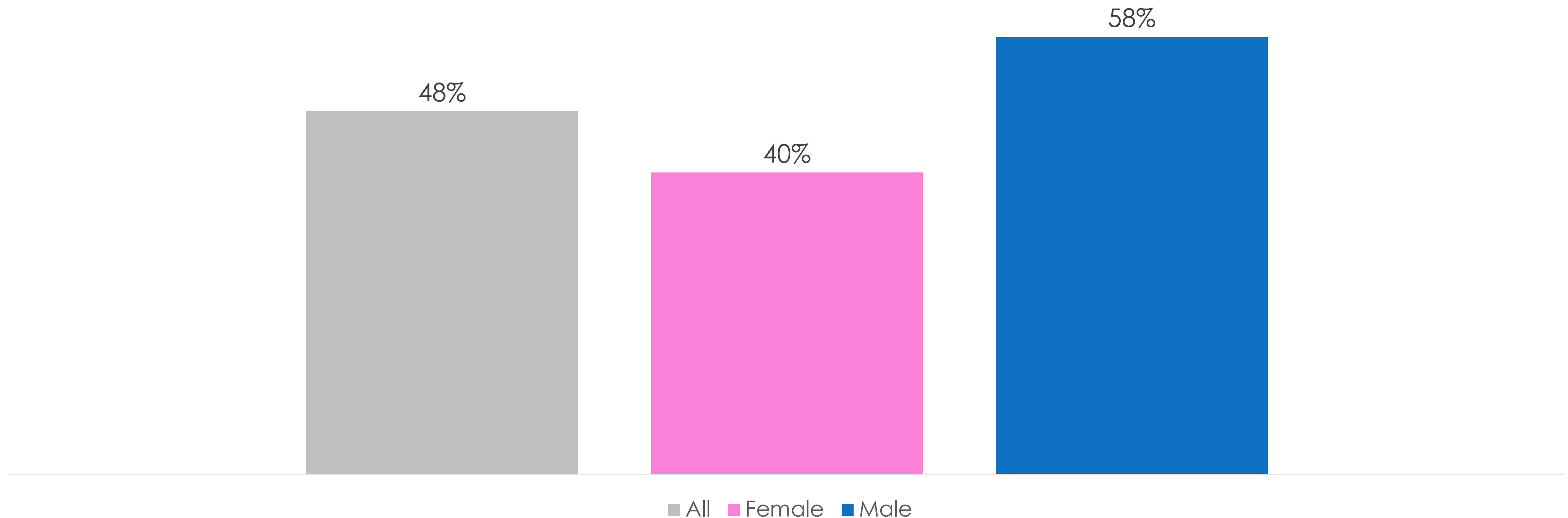
Those who think companies/products should not take stand on political issues



Do you think companies or products should take a stand on social or political issues?

Men (58%) are much more likely to want brands to take a stand than women (40%).

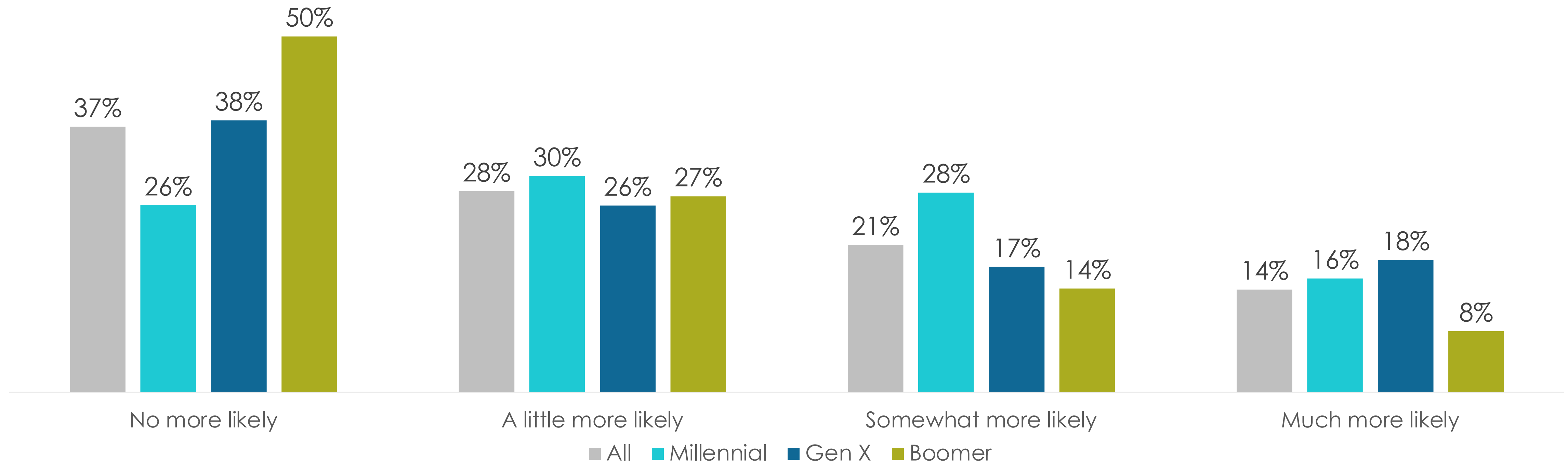
Those who think companies/products should take stand on political issues



Do you think companies or products should take a stand on social or political issues?

Despite 52% feeling brands should not take a stand on issues, only 37% feel that they're no more likely to buy a product that adopts a position with which they agree.

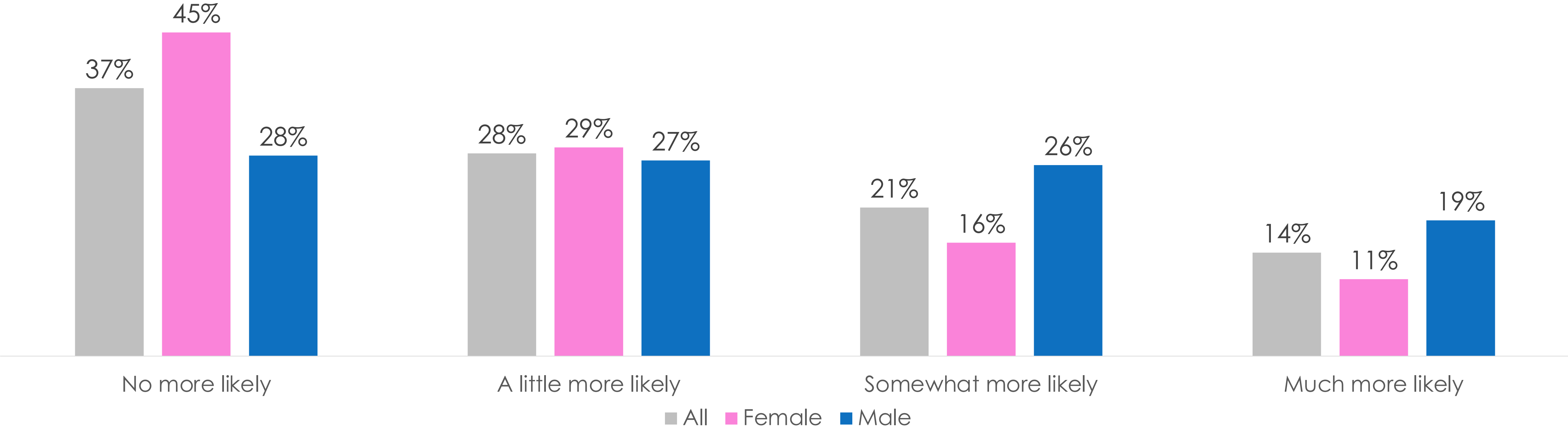
More likely to buy product because it took a political stand with what you agree



How much more likely would you be to buy a product because it took a stand on a social or political issue with which you agreed?

Men are much more likely than women to support brands that express a position with which they agree.

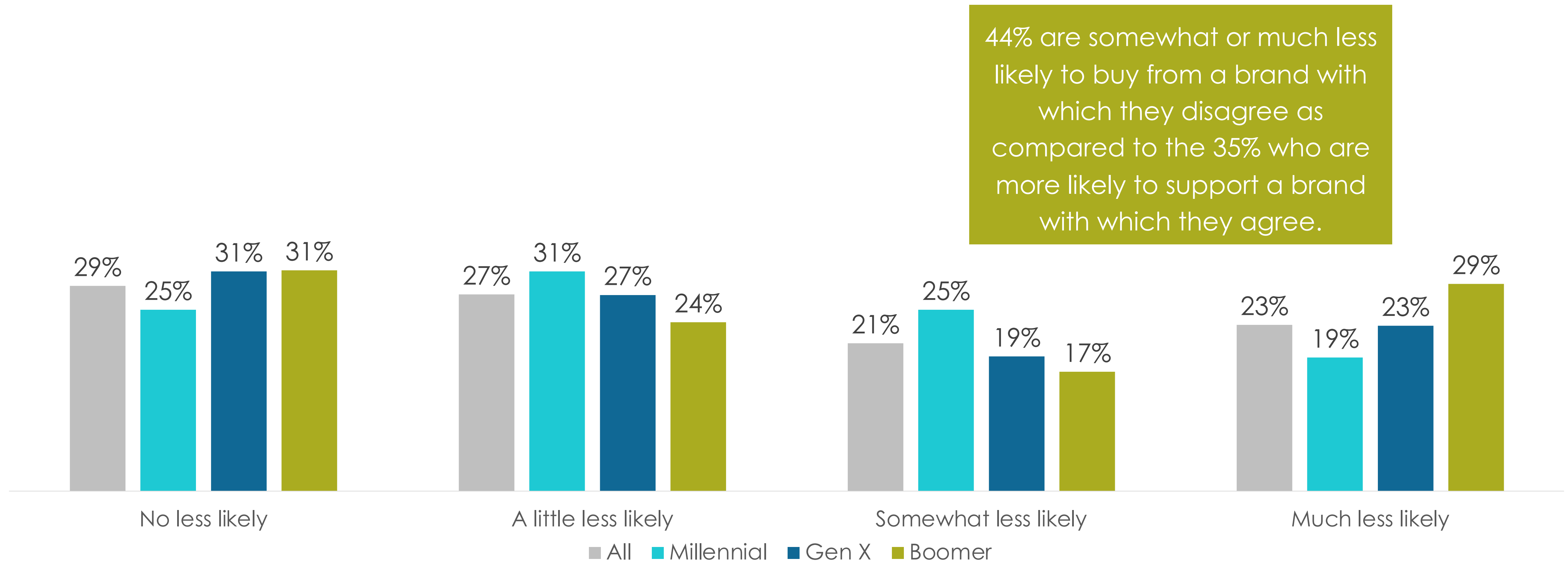
More likely to buy product because it took a political stand with what you agree



How much more likely would you be to buy a product because it took a stand on a social or political issue with which you agreed?

The downside of adopting a position with which consumers disagree outweighs the upside.

Less likely to buy product because it took a political stand with what you disagree



How much less likely would you be to buy a product because it took a stand on a social or political issue with which you disagreed?

Summary

COVID-19 and its potential impact on the coming elections continue to dominate the news.

- Only 43% of respondents are sure they'll get a COVID vaccine when it becomes available.
- Among those opposed to or unsure of the COVID vaccine, the majority (56%) are concerned about the safety of a vaccine developed so quickly.
- Of those planning to get the vaccine, 71% feel the government should make it mandatory.
- 50% of respondents believe the FDA/CDC are or may be taking steps to slow the development of a COVID vaccine.
 - Of those 50% of respondents who believe the FDA and CDC are or may be deliberately taking steps to slow the development, 54% think that it is a good thing.
- Given the lessons learned from protecting themselves from COVID, many people plan to carry the steps they've taken to protect themselves into the post-COVID world.
 - 66% say they will avoid crowded places, and 58% will shop online more frequently than pre-COVID.

Summary - Continued

Despite the prevalence of COVID and concerns about it overlapping the flu season, only 55% of respondents plan on getting a flu shot this year.

- Among the 45% who don't plan on getting a flu shot this year, the primary reasons are: a lack of confidence in the vaccine (45%), confidence in the protection they get from their Coronavirus precautions (33%), and a fear of needles (19%).
- 46% of respondents feel that the collective protections society is taking to protect against COVID will result in a milder flu season.

Given the contentiousness of election politics, it's not surprising that it will impact the media consumption habits of 38% of respondents.

- The anticipated change in consumption is significantly higher among men (48%) than among women (30%).
- Social media (74%) and streaming services have surpassed broadcast and cable TV in popularity among all but the 80% of Boomers who utilize traditional media formats.
- Facebook remains the most popular social media platform (79%), but one-third or more of GenXers and Millennials are using Instagram, Twitter, Pinterest and Snapchat.

Summary - Continued

All media types will benefit from increased consumption, most notably newspapers, with 58% of those increasing their media using them more and broadcast and cable TV with 57% using them more.

- Across all platforms, the increase among men will be significantly greater than the increase among women.

The increase in media consumption is not being driven by the appeal of political advertising.

- Only 25% of respondents feel political ads help them understand candidates' views on key issues.
- More people distrust the advertising (28%), and nearly as many (24%) ignore it.

Despite 52% of respondents feeling brands should not take a stand on issues, only 37% feel that they're no more likely to buy a product that adopts a position with which they agree.

- Men are much more likely than women to support brands that express a position with which they agree.

The downside of adopting a position with which consumers disagree outweighs the upside.

- 44% are somewhat or much less likely to buy from a brand with which they disagree as compared to the 35% who are more likely to support a brand with which they agree.