



COVID-19 U.S. CONSUMER IMPACT TRACKING STUDY – WEEK 6

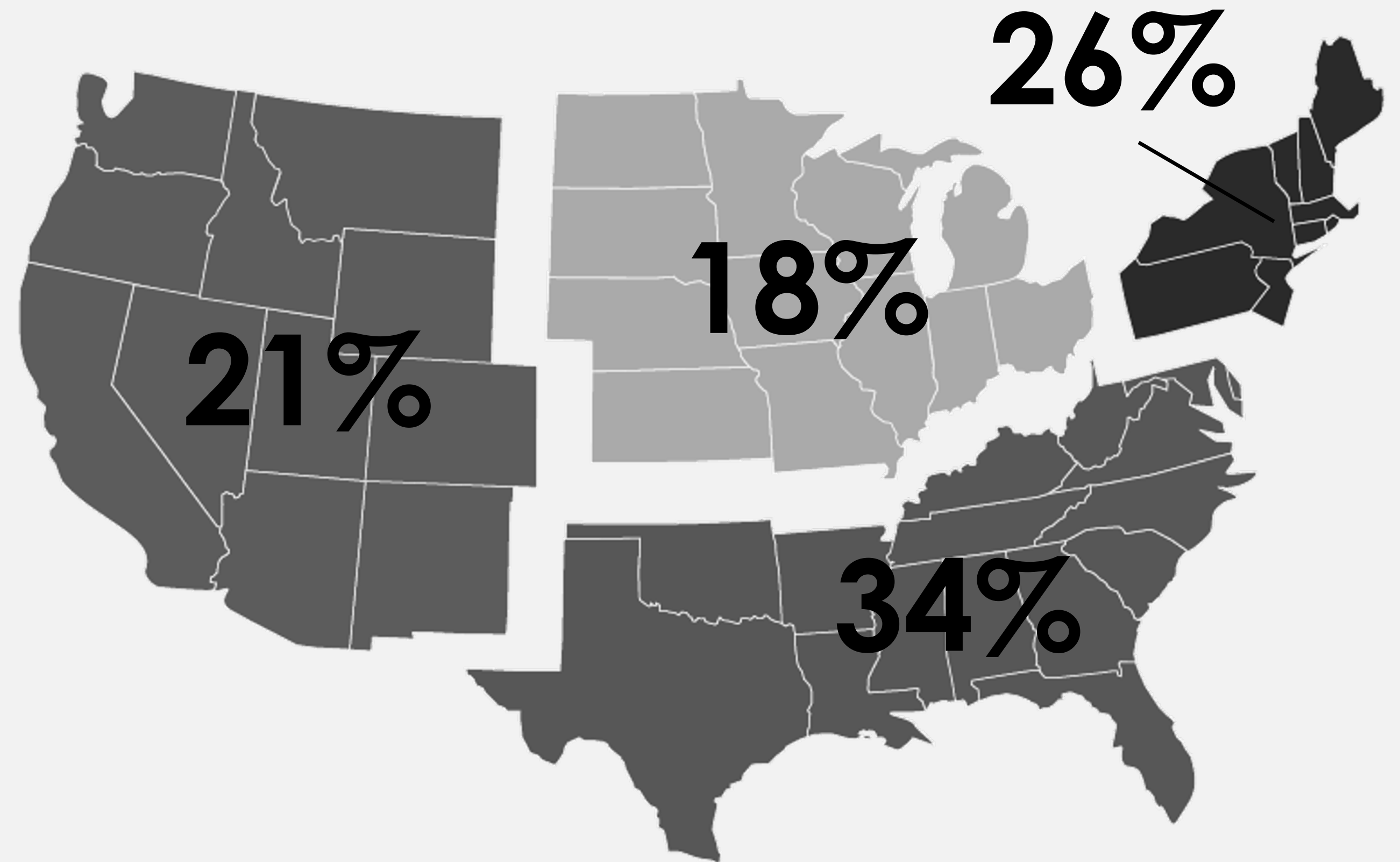
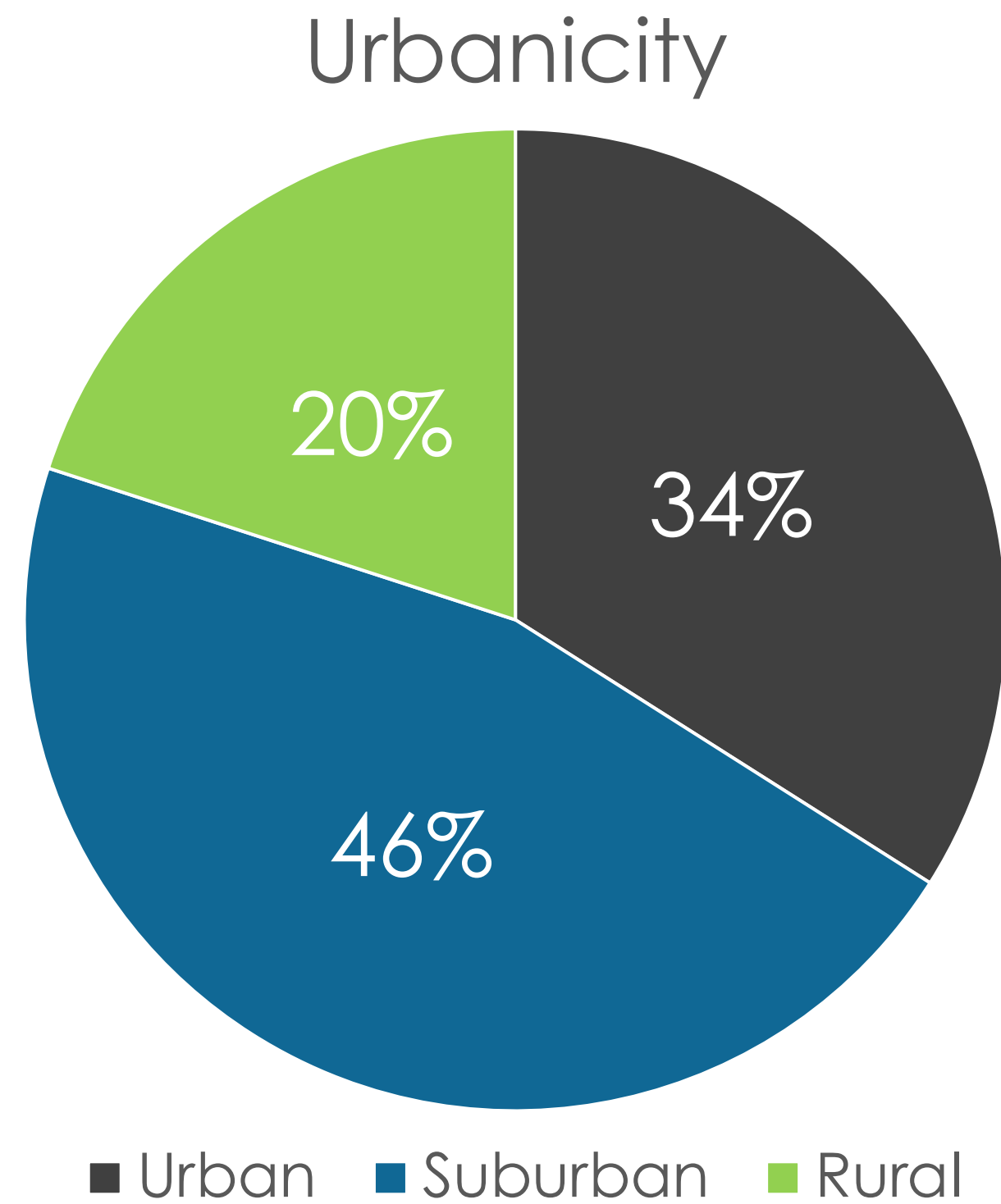
PRESENTED APRIL 13, 2020

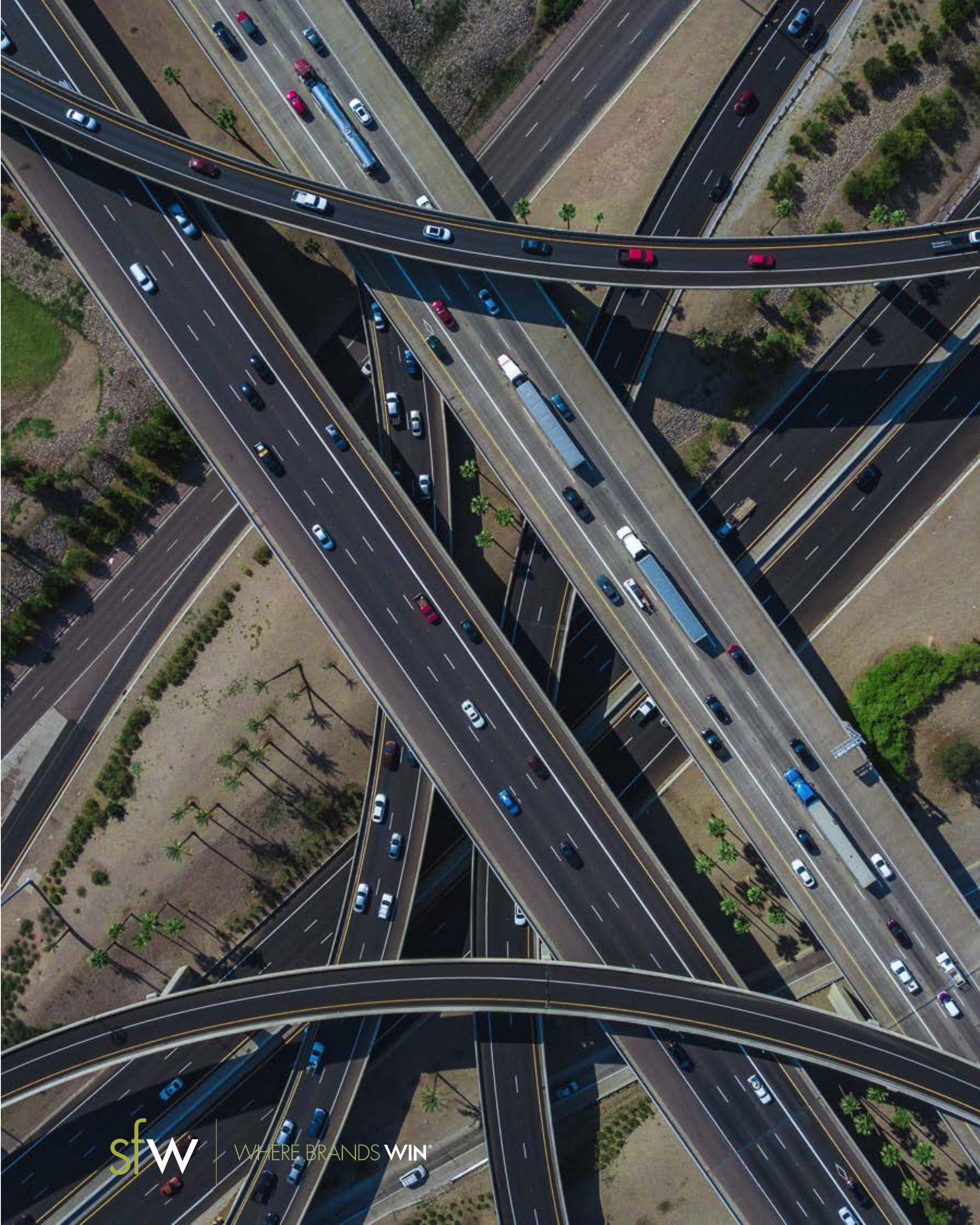
Methodology

- N = 1,078; Census Balanced
- MOE = $\pm 2.98\%$
- Panel: General Population
- Collected: 04/10/20, 04/11/20

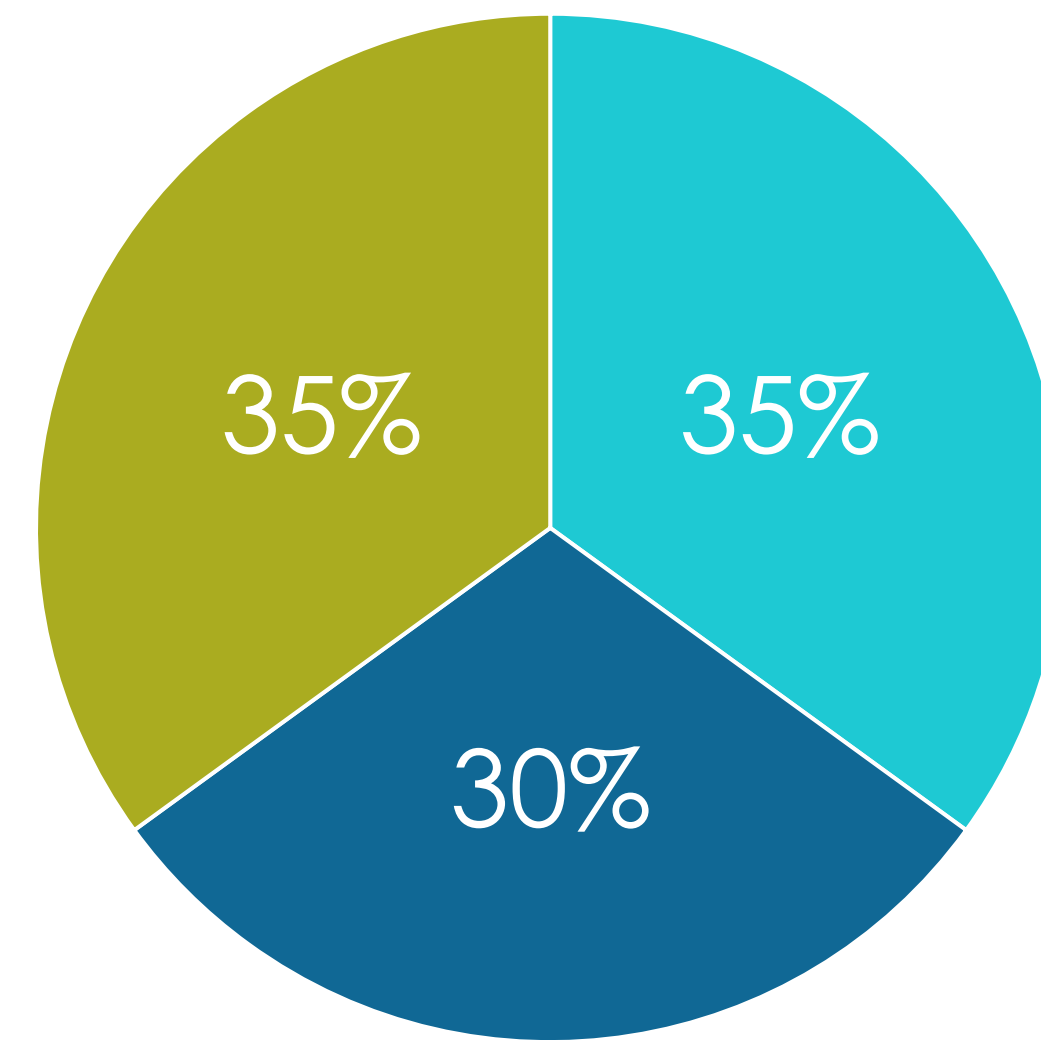


Census Balanced Panel is Representative of America



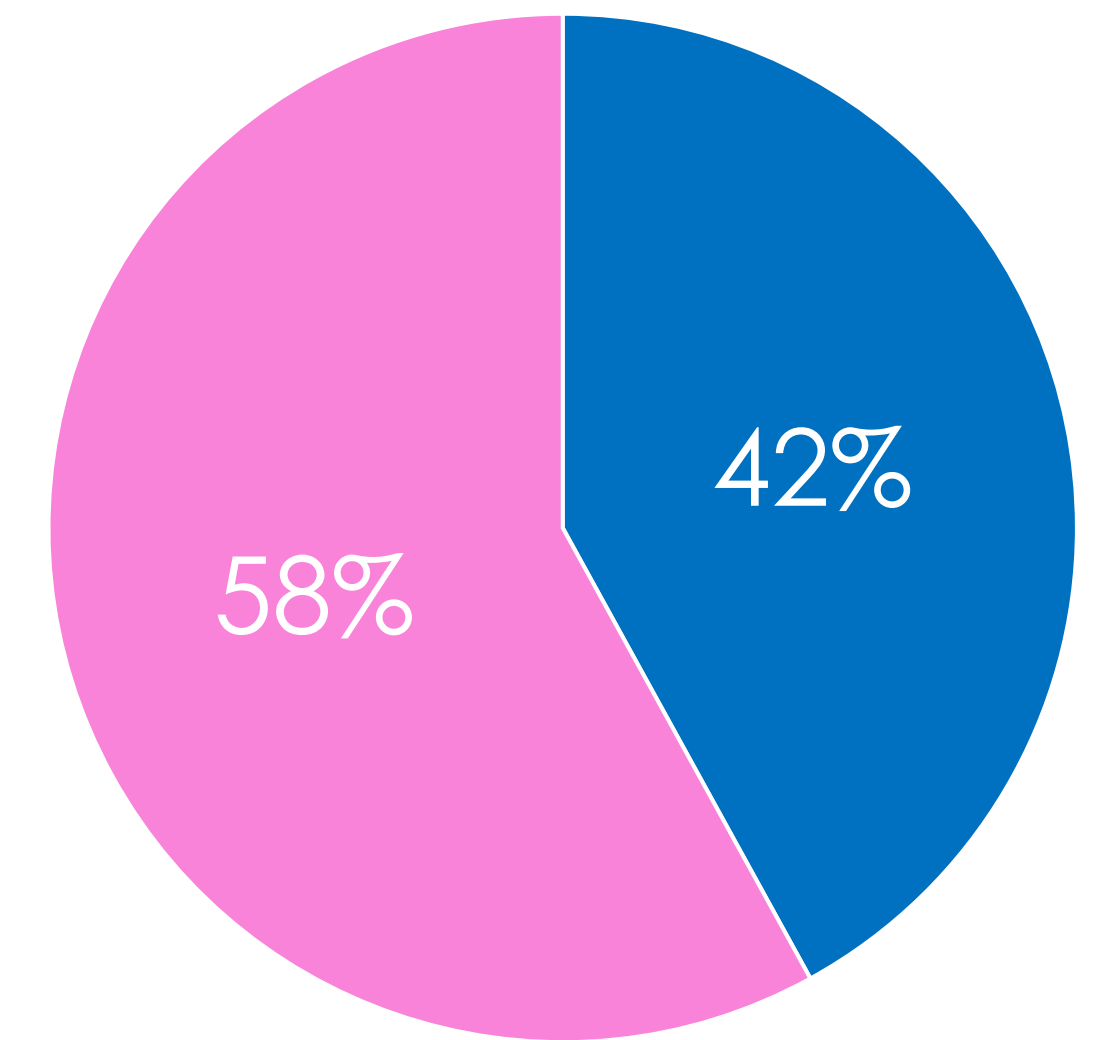


Generation



■ Millennial ■ Gen X ■ Boomer

Gender



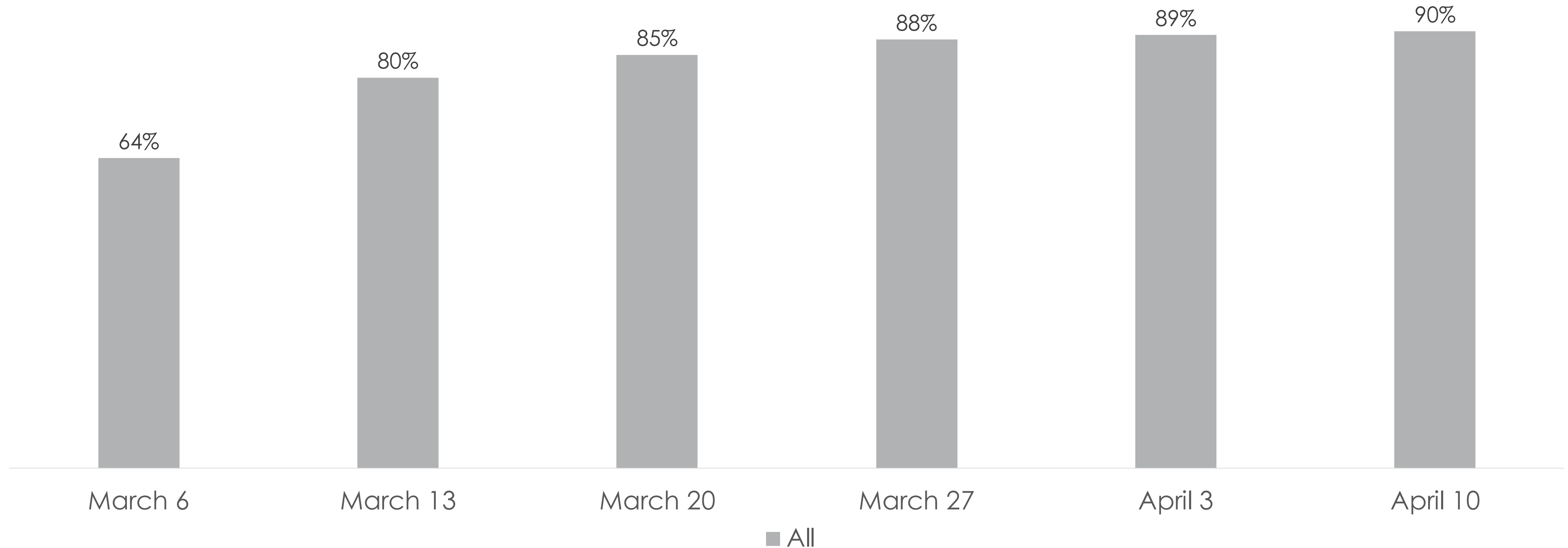
■ Male ■ Female

A person wearing a full white protective suit, including a hood and a clear face shield, is leaning towards the driver's side window of a car. They are wearing blue gloves and holding a clipboard. The scene is outdoors, possibly at a drive-through testing station. The background is slightly blurred, showing other vehicles and structures. The overall tone is serious and professional.

COVID-19 Status

Familiarity with the virus has stabilized at about 90%.

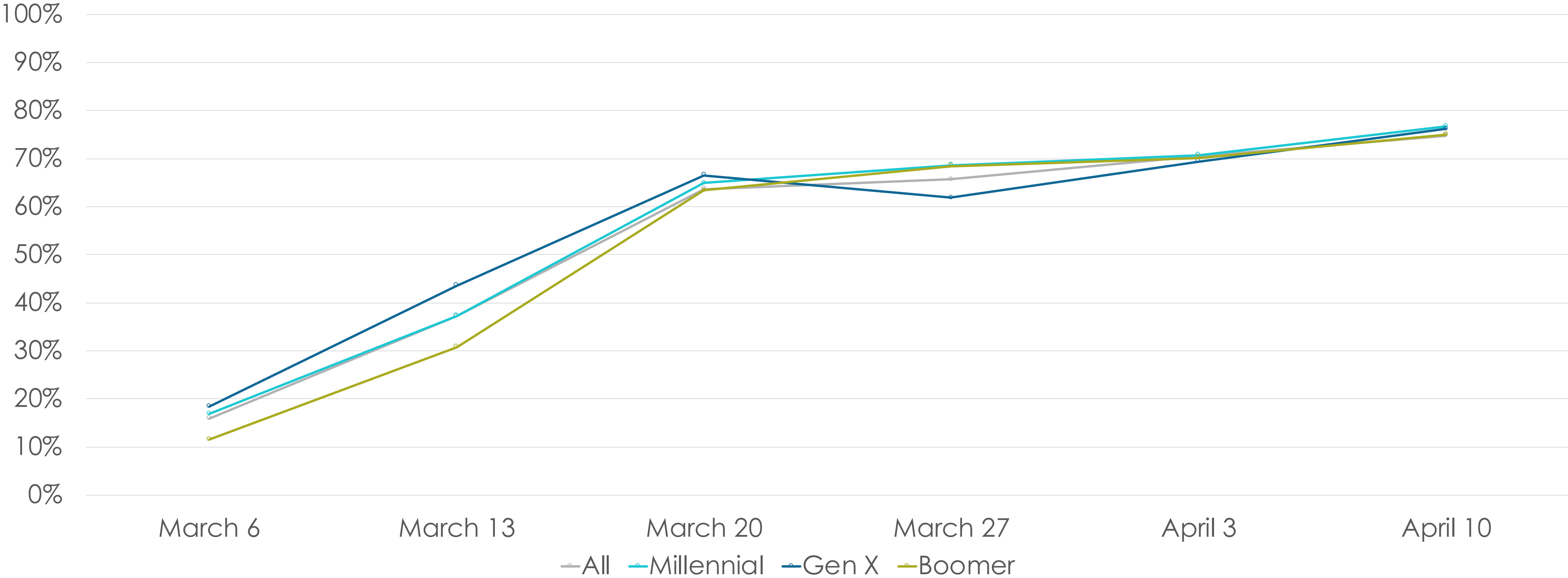
Familiarity with Coronavirus



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

The number of people impacted by Coronavirus continues to grow. Only one-quarter of the population is unaffected to date.

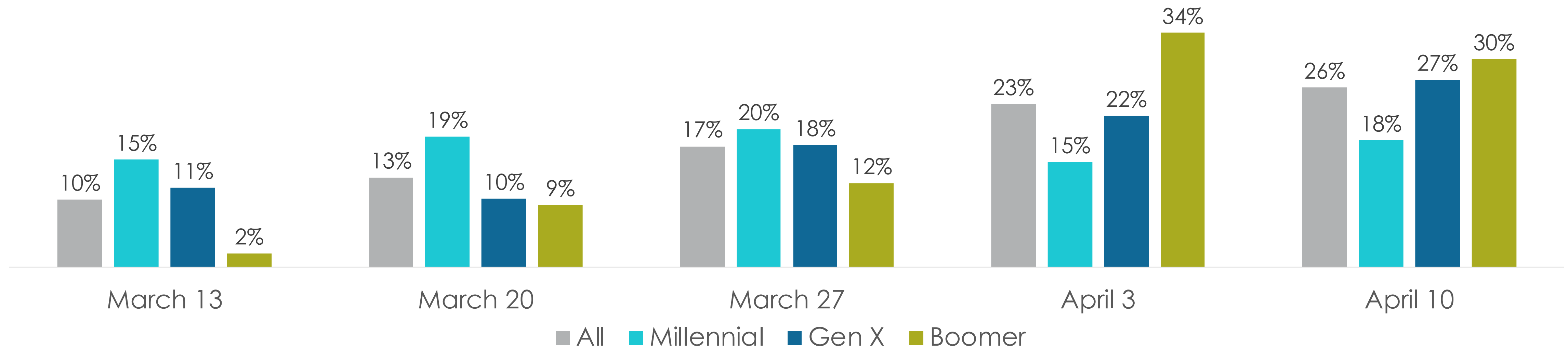
Impacted by Coronavirus



Have you been impacted by the Coronavirus?

More than a quarter of the population now know someone who has been stricken with the virus.

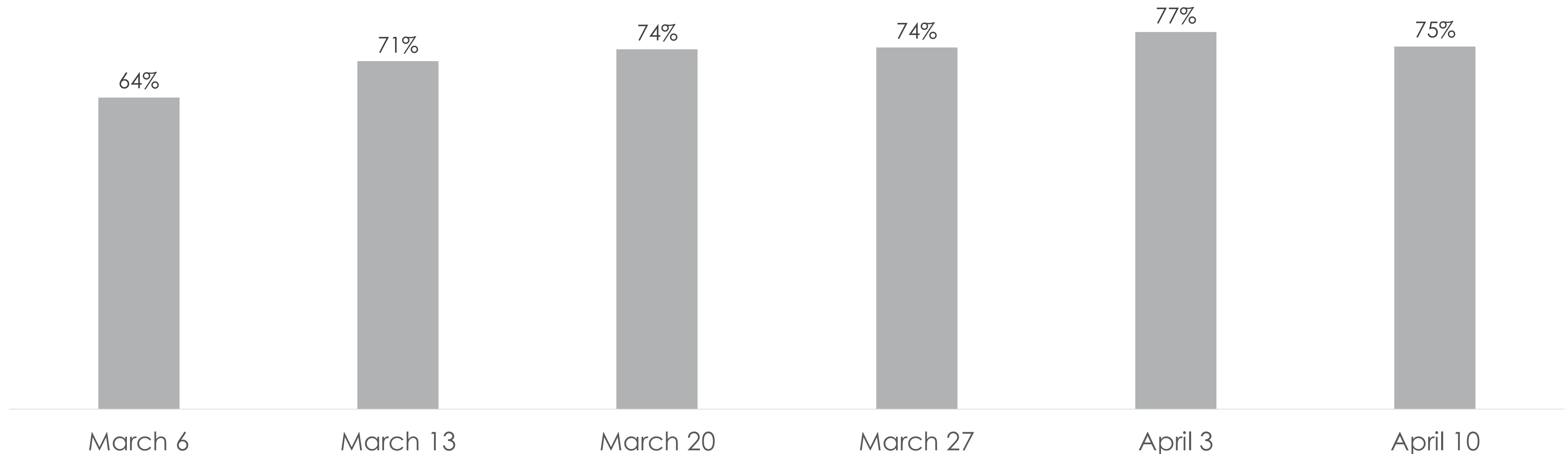
Know someone with Coronavirus



Do you personally know anybody who has been diagnosed with the Coronavirus?

Despite the substantial increase in the number of U.S. cases, three quarters of respondents feel the precautions they're taking will protect them.

Confident in extra precautions taken

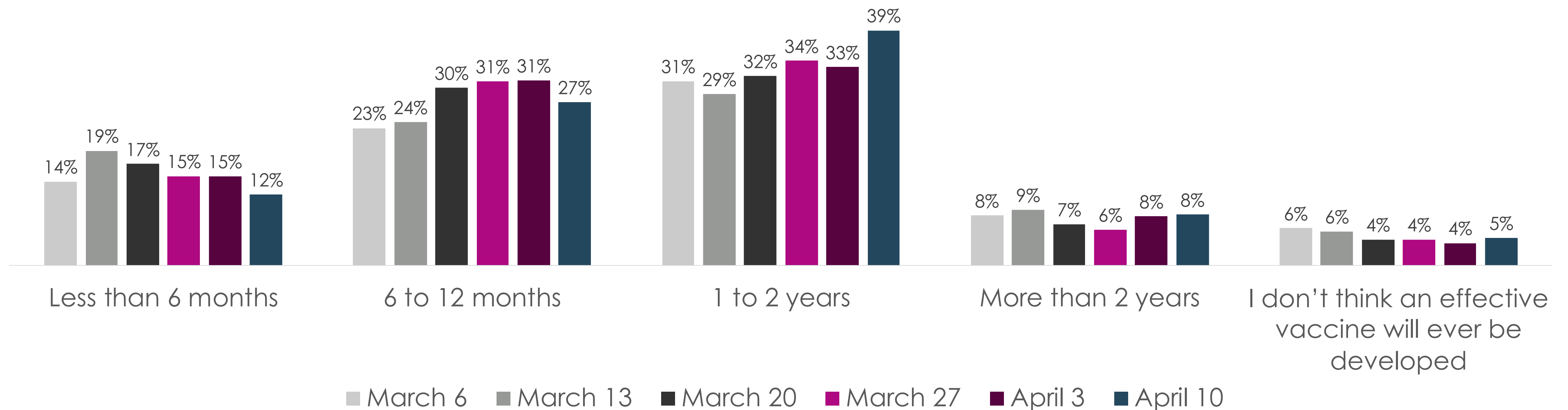


■ All

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?

People's confidence in the timely development of a vaccine is beginning to wane. Only 39% believe it can be achieved within a year.

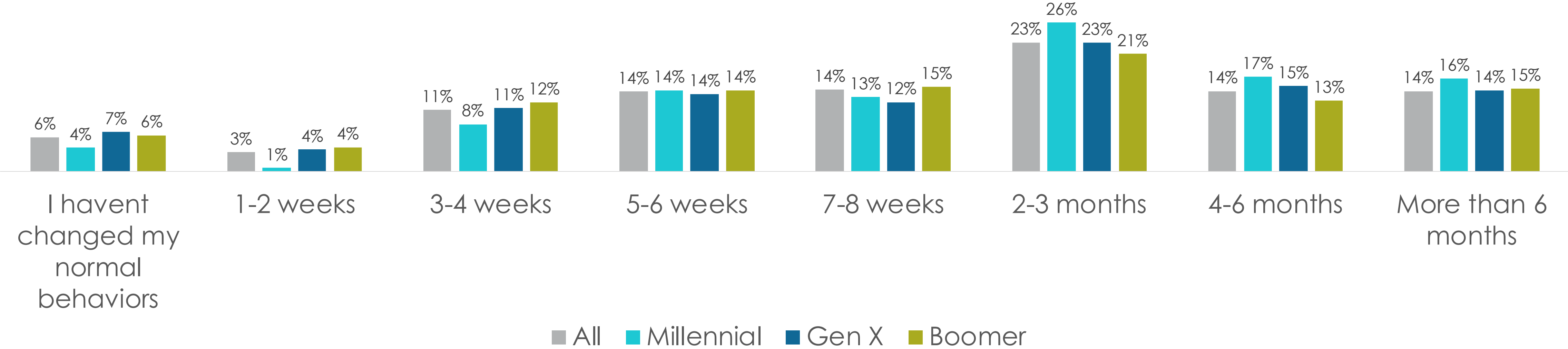
Timeframe to develop a vaccine for Coronavirus



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

Similarly, we're seeing a shift in people's expectation of the timing of a return to normal behaviors. More than half (51%) believe it will take more than 2 months.

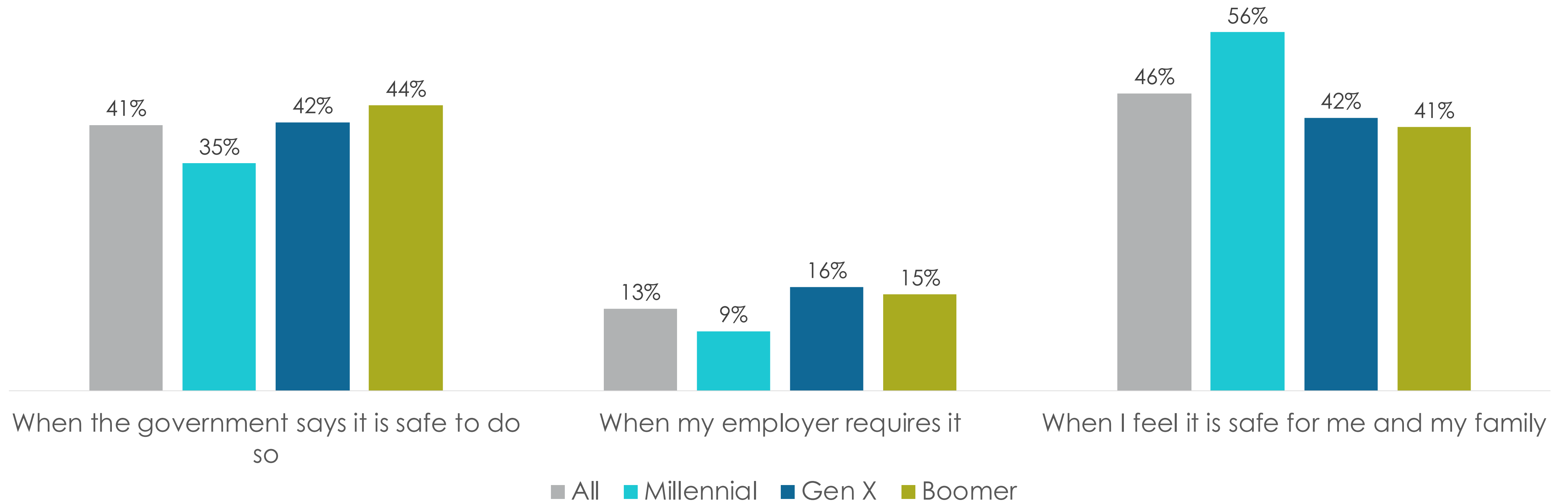
Timing of return to normal behavior



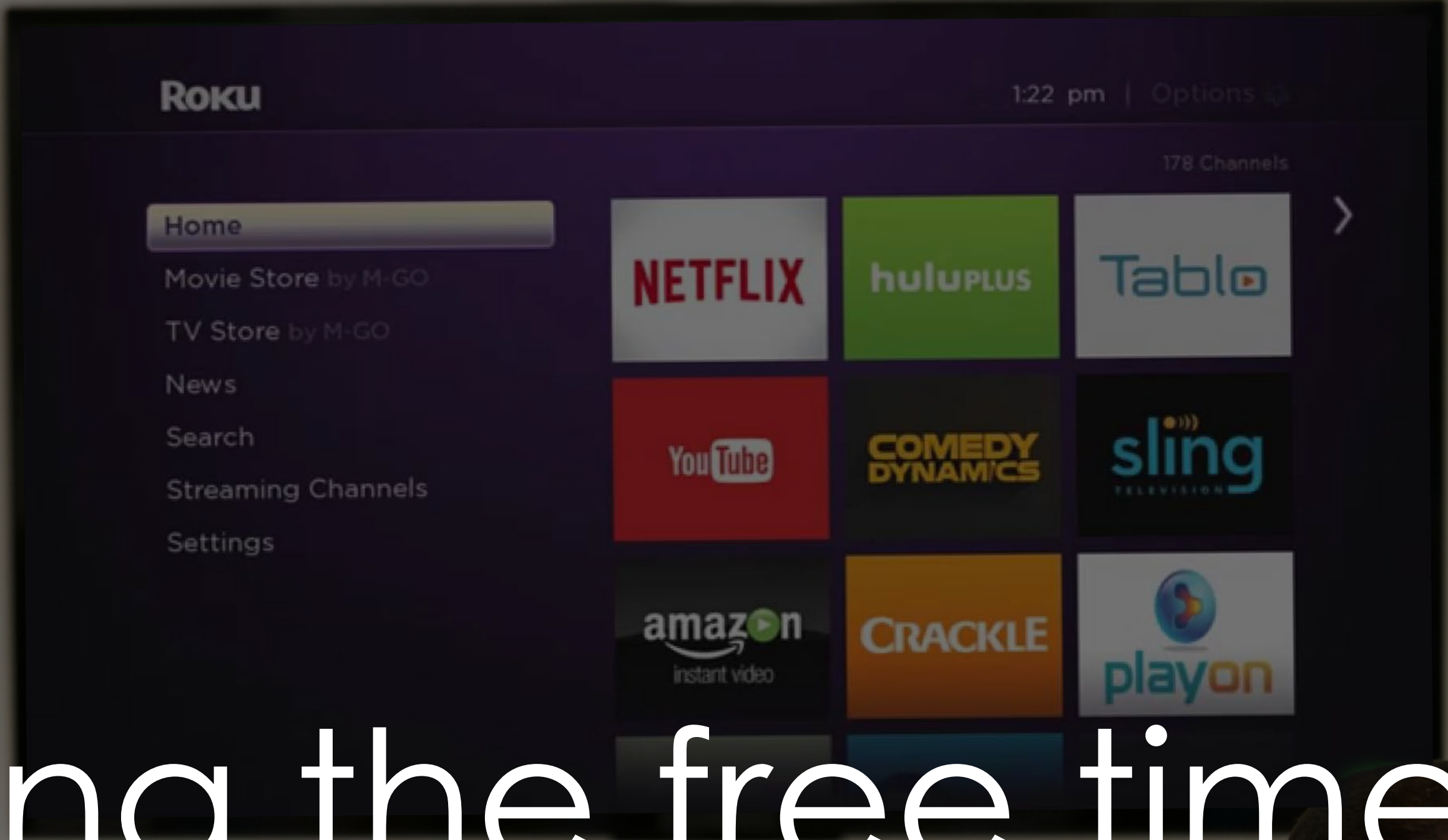
When do you think it's likely that you'll return to your normal behaviors (going to work, eating out, shopping, etc.)?

Millennials (56%) are, by far, the most likely to say that the return to normalcy will occur on their terms.

Motivation to return to normal behaviors



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

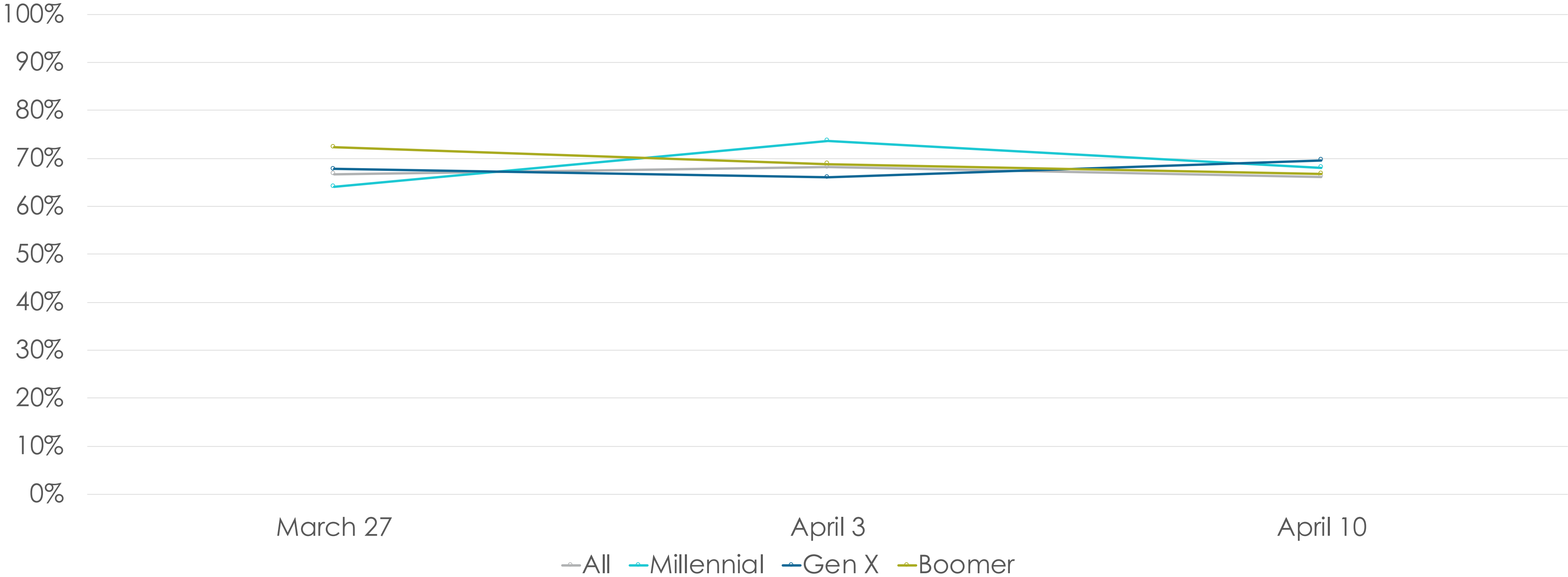


Filling the free time



There has been no change in respondents' adaption to shelter-in-place orders. 70% say they are handling it well or very well.

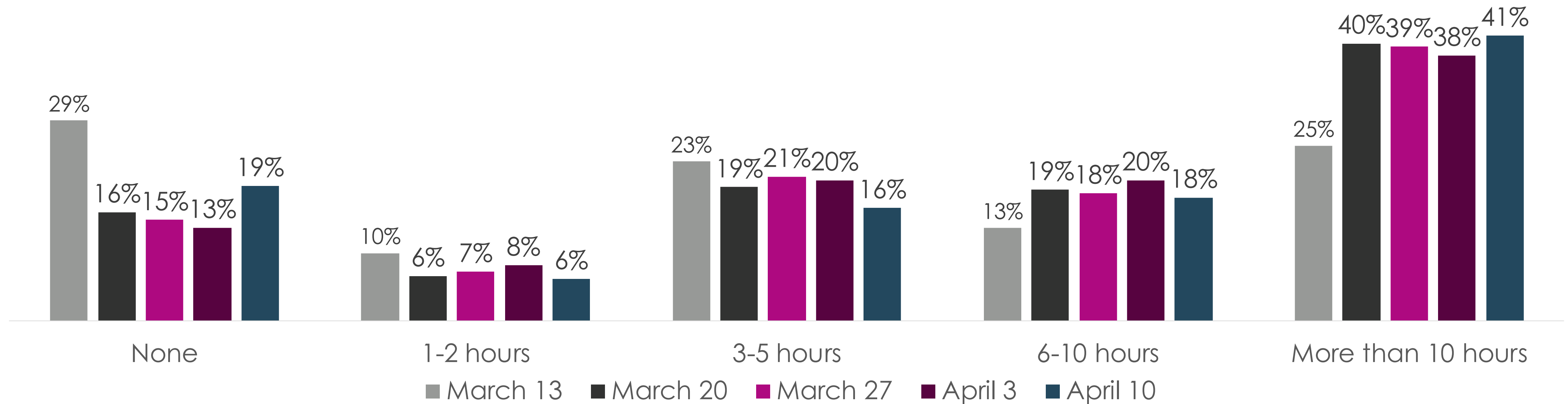
Adaption to shelter-in-place orders



How have you adapted to the shelter in place order?

As a result of lost jobs, reduced commutes and other changes, people find themselves with large quantities of free time.

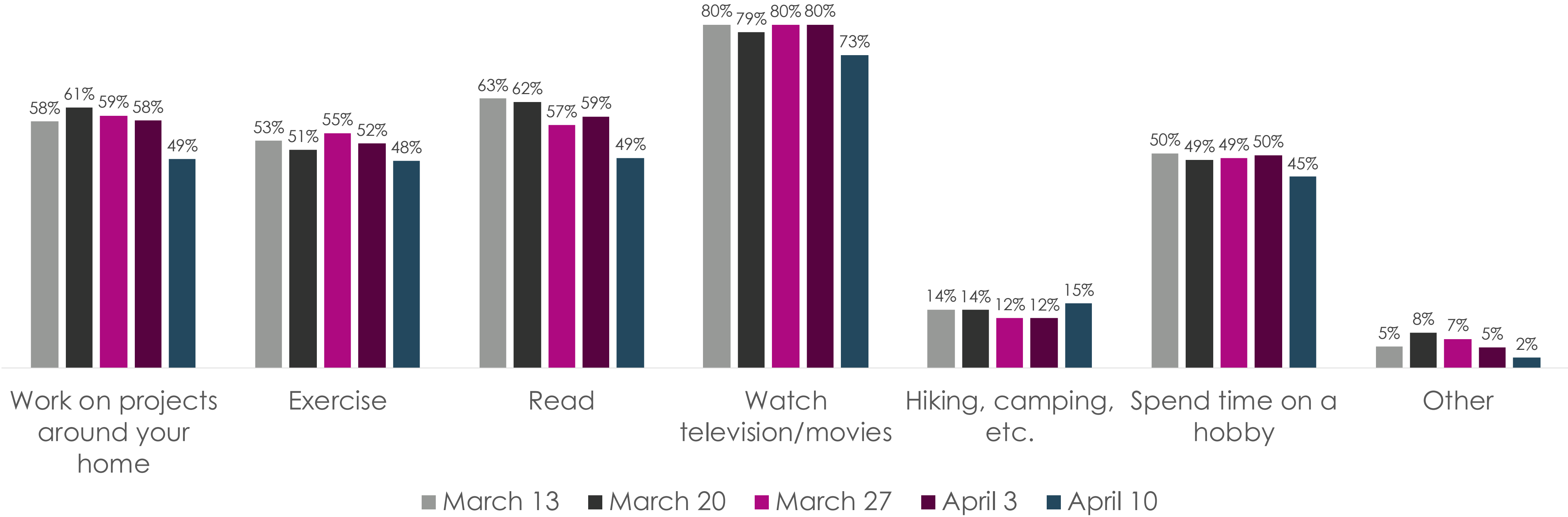
Free hours due to cancellations



As a result of many cancellations, people have found themselves with extra time on their hands. How many additional free hours a week do you have?

And, because the median amount of extra time people have is nearly 10 hours, it is being spread across a number of activities.

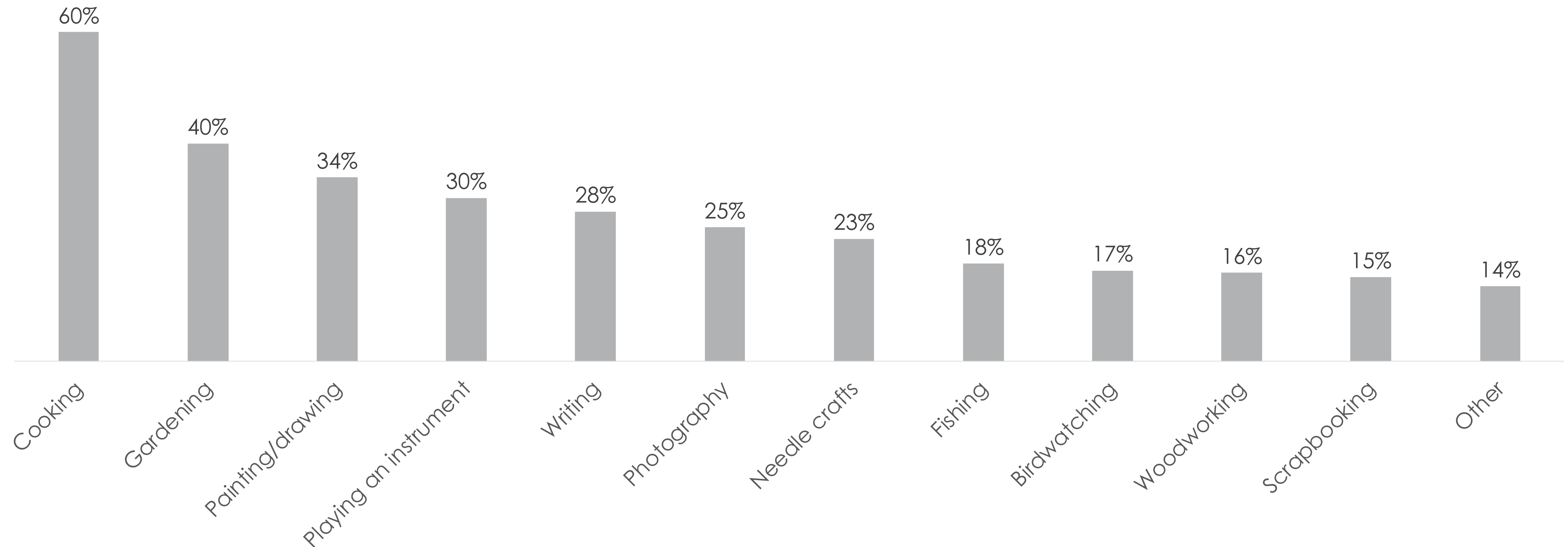
Activities done in free time



Which of the following are you likely to do with the additional free time you'll have? Select all that apply.

Nearly half the respondents are spending a portion of their time on hobbies, led by cooking and gardening.

Hobbies filling extra free time



Which of the following hobbies are you spending your extra free time doing? Select all that apply.

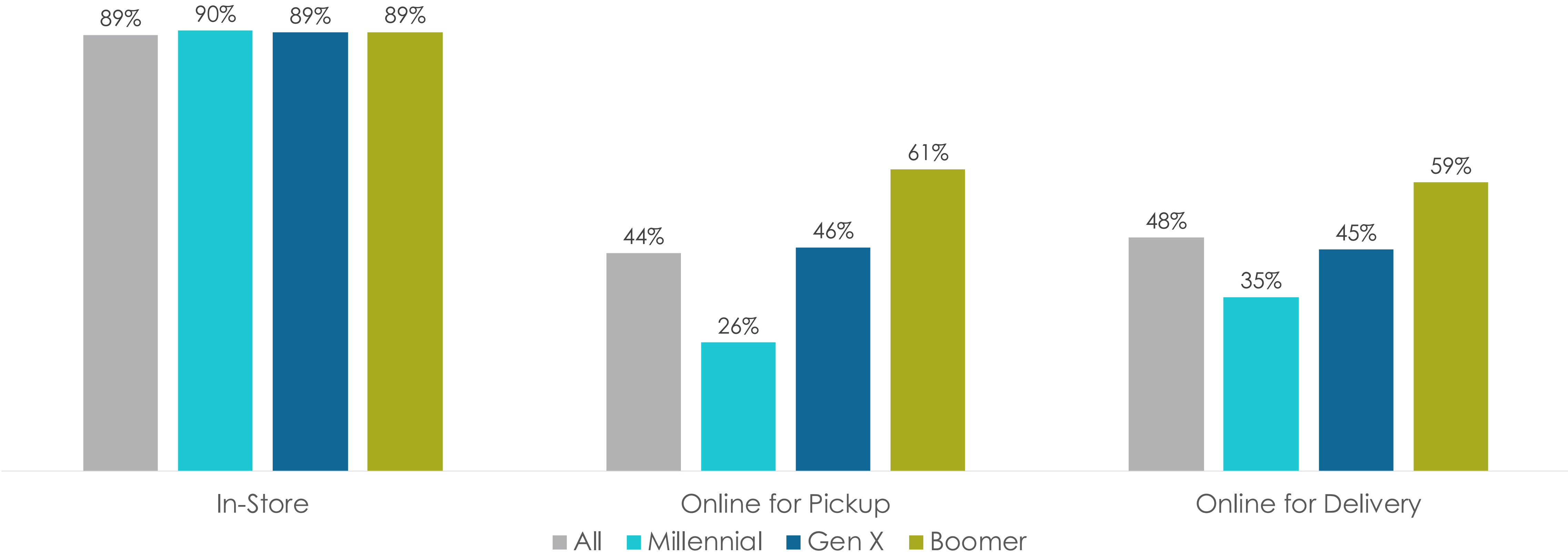
It is not just the hobbyists that are doing more cooking.

88%

of households are preparing more meals at home.

Surprisingly, with all the delivery and pickup options that are available nearly 90% of respondents are still going into the grocery store.

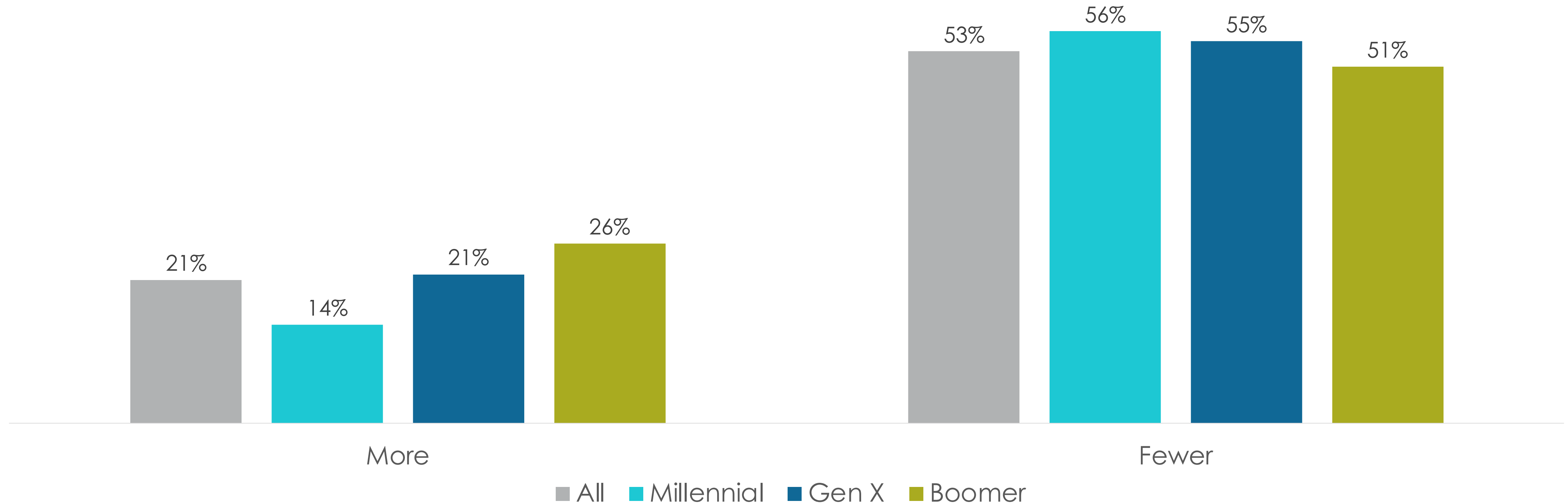
Grocery shopping method



Which of the following methods have you used to purchase groceries?

A slight majority (53%) are shopping in fewer locations than they did before the outbreak, but 1 in 5 are shopping at more.

Shopping more or fewer locations since Coronavirus outbreak

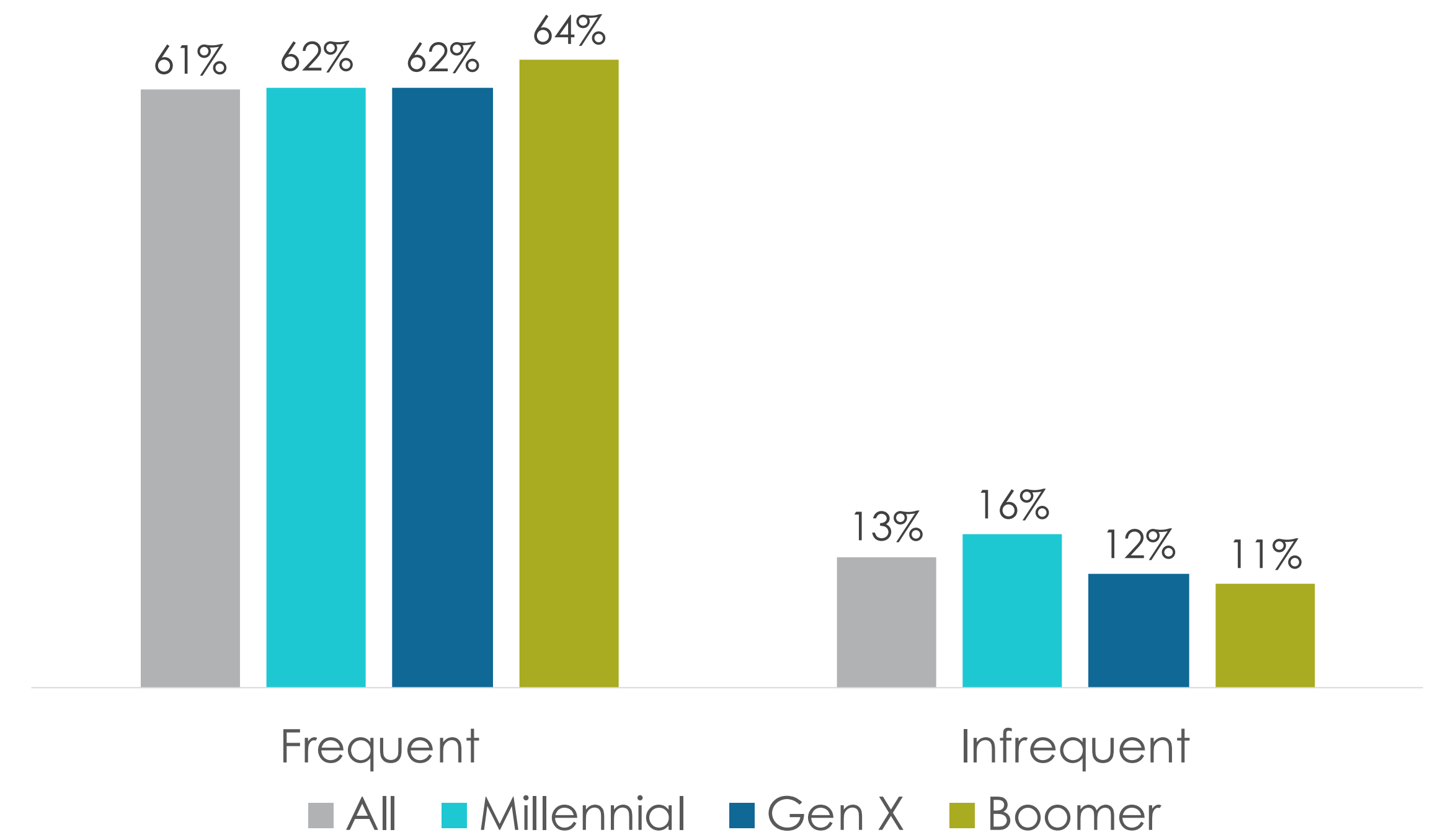


Do you find you're shopping at more or fewer locations since the COVID-19 outbreak?



As a result of stockpiling by some, more than 60% of the sample has experienced out-of-stocks on ingredients for a planned meal.

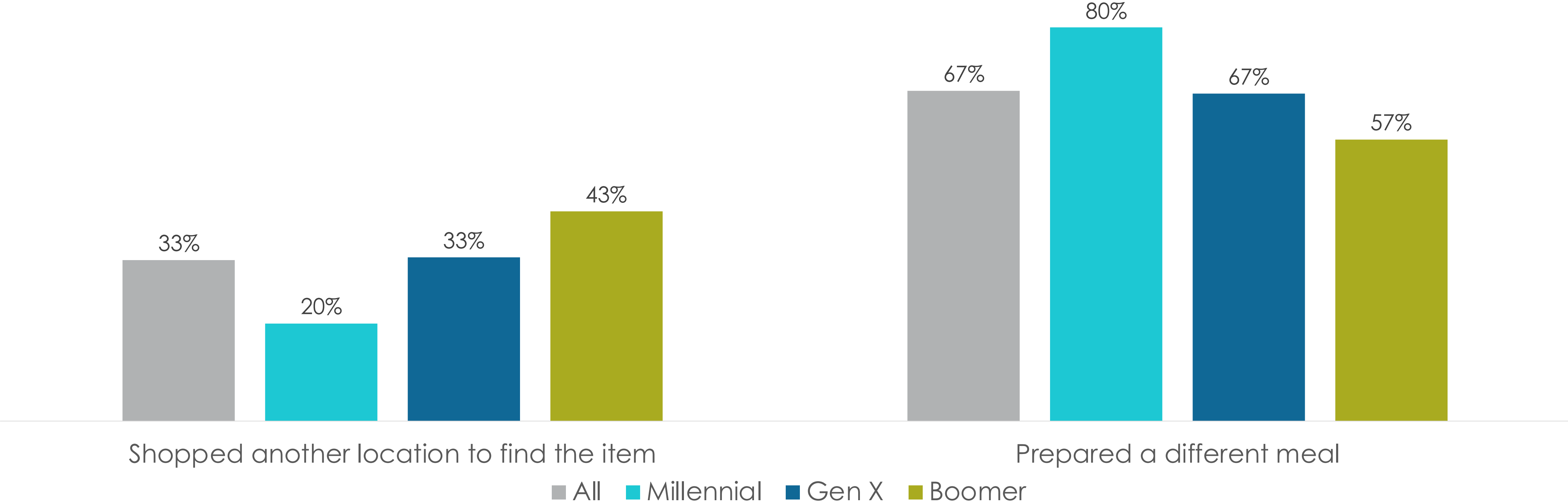
Frequency of encountering ingredient out-of-stocks



How frequently have you encountered out-of-stocks on items that you needed for a meal you planned?

While two-thirds of respondents have been satisfied to prepare a different meal when encountering out-of-stocks, 1/3 have chosen to shop other locations for their ingredients.

Actions when encountering out-of-stocks

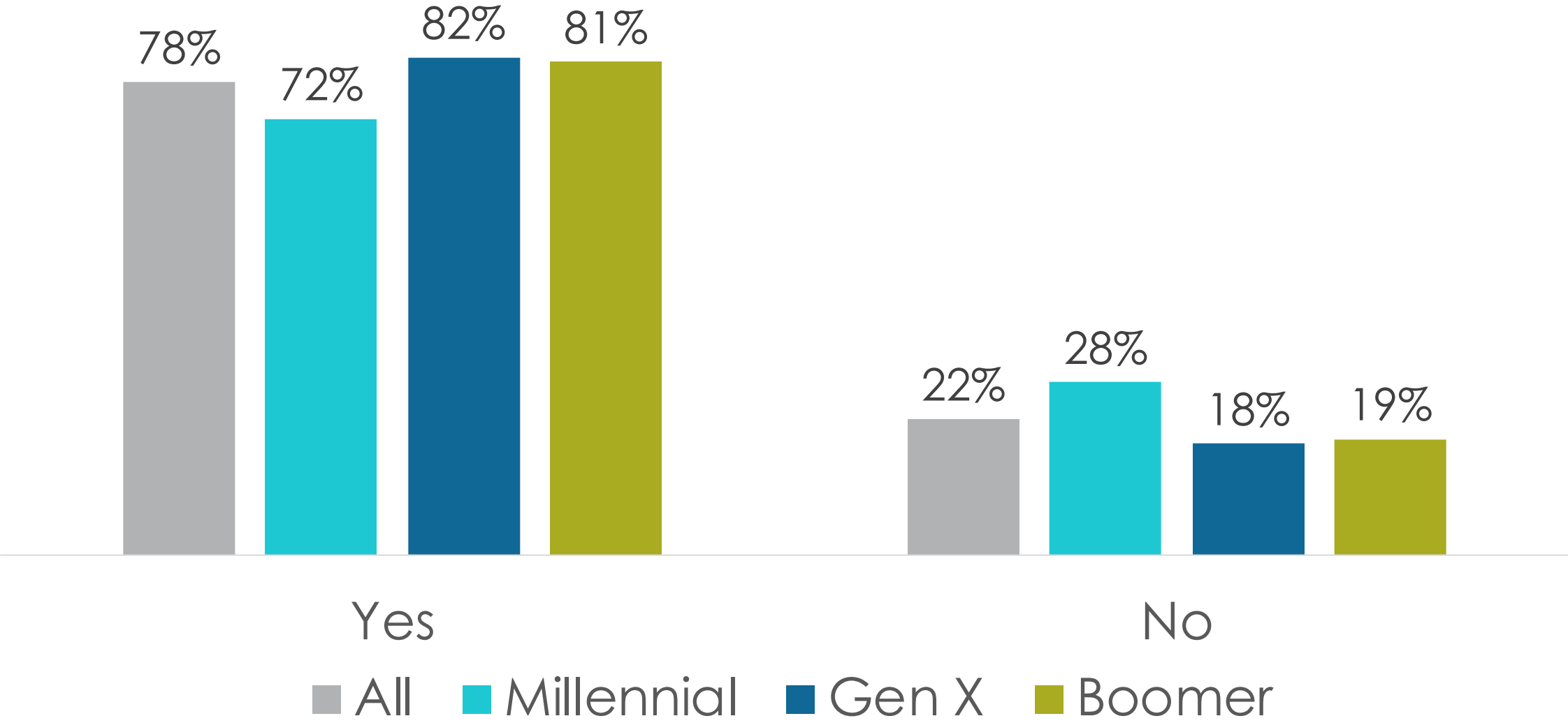


What have you typically done when you encountered out-of-stocks?



Nearly 80% of the sample has encountered situations where they can find a needed ingredient, but not their preferred brand.

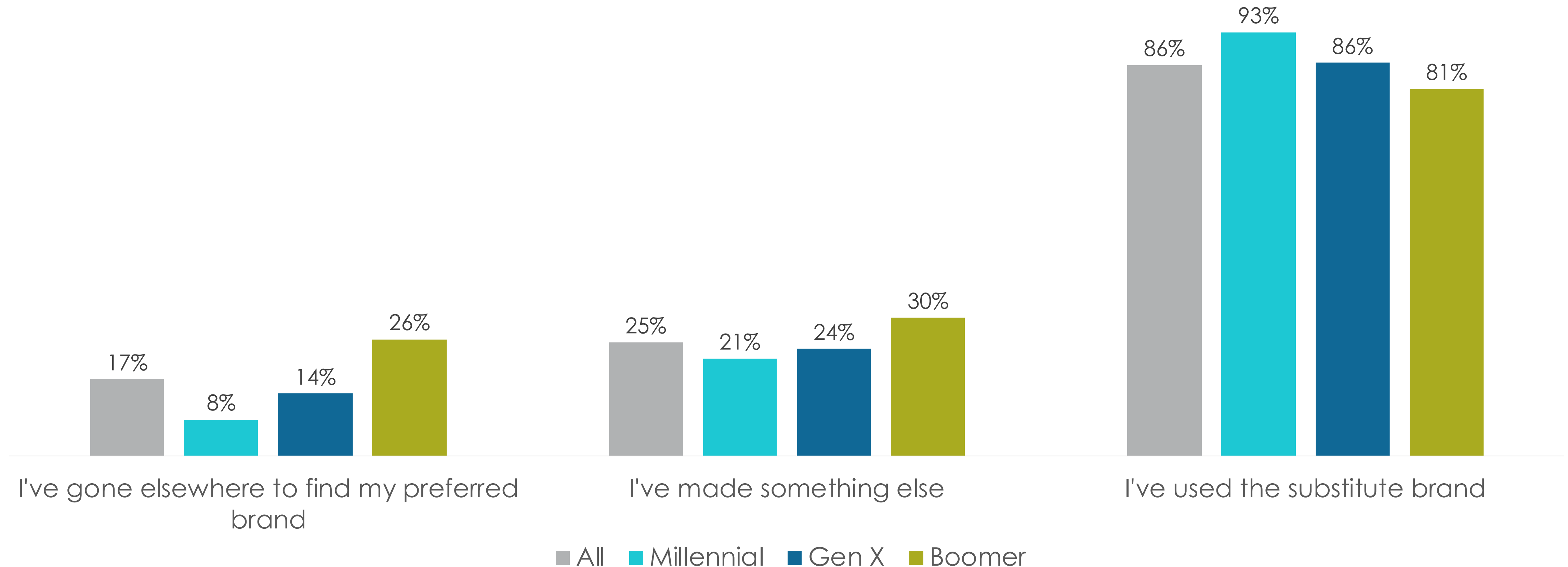
Finding the items needed, but not the preferred brand



Have you had situations where you can find an item you need, but not the brand you prefer?

In those instances, the vast majority of people (86%) have purchased a substitute brand.

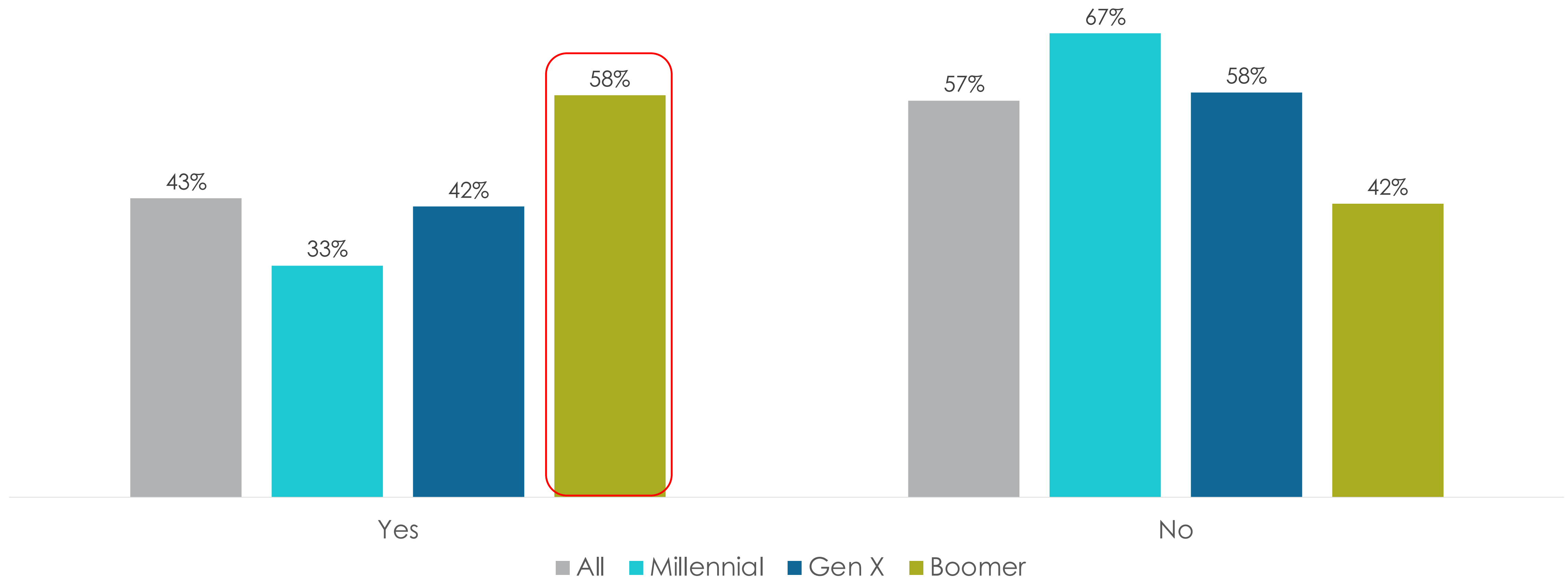
Approach to finding the meal items needed, but not the preferred brand



In the situations where you can find the product you need, but not your preferred brand, what have you done? Select all that apply.

For 43% of the respondents, one or more of their substituted products are now preferred. Highest among the Boomers which would be expected to be most brand loyal.

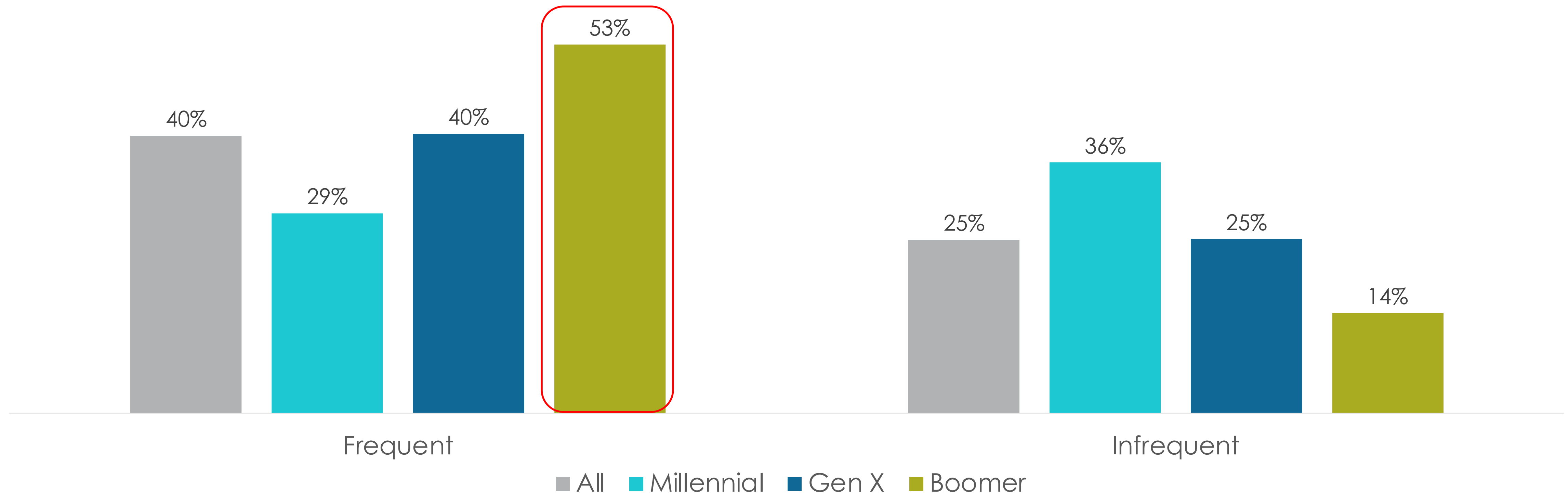
Prefer substitute brands over regular brand



In cases where you've used a substitute brand have you ever found that you prefer the new brand more than your regular brand?

The extra time cooking has led many, including more than half (53%) of the Boomers, to try new recipes.

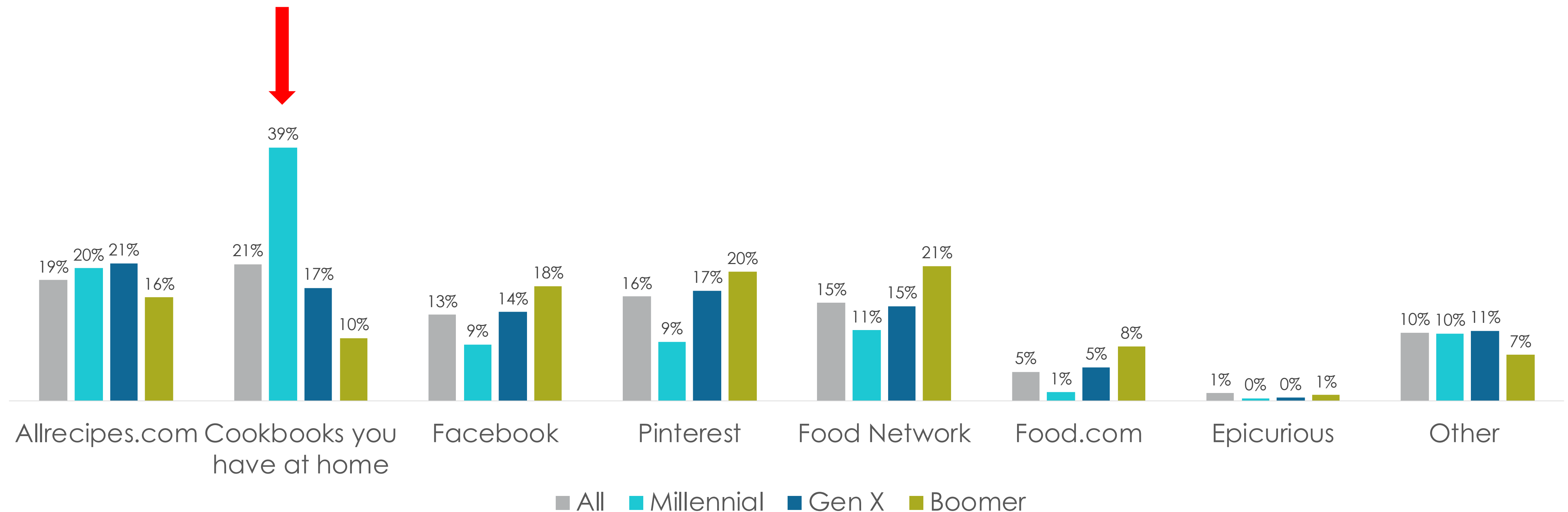
Frequency of trying new recipes



How frequently have you been trying new recipes?

Various sources are being used to find new recipes. Interestingly, it is the digital generation that is most likely to use cookbooks.

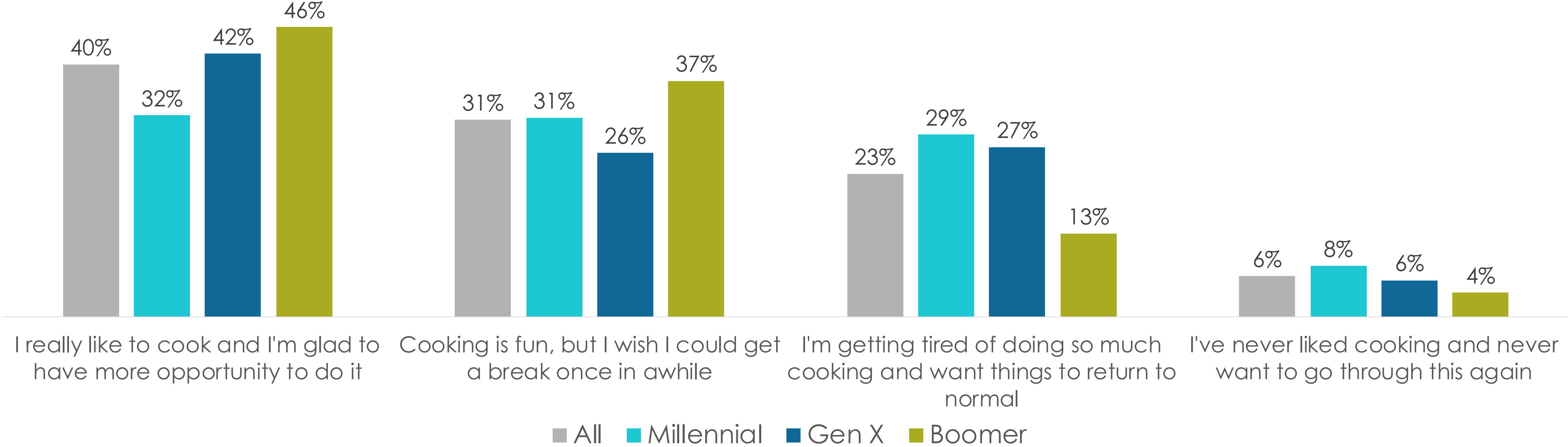
Primary source of new recipes



What is your primary source of new recipes?

The hobbyist cooks are really enjoying their extra time to cook. However, most respondents (60%), at the very least, yearn for a break.

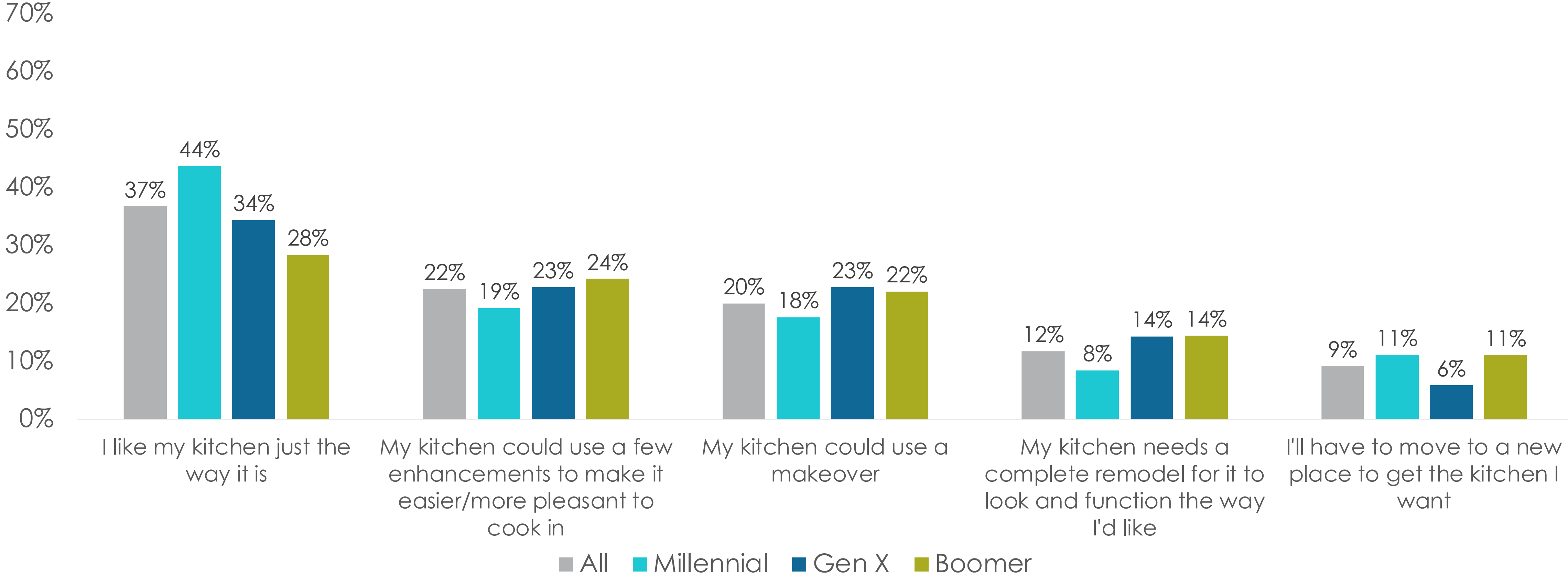
Attitudes about preparing more meals



Which of the following best describes how you feel about preparing more meals at home?

Nearly two-thirds of the cooks would like to see at least some minor improvements to their kitchen, and 2 in 10 think drastic measures are required.

Attitudes about kitchen



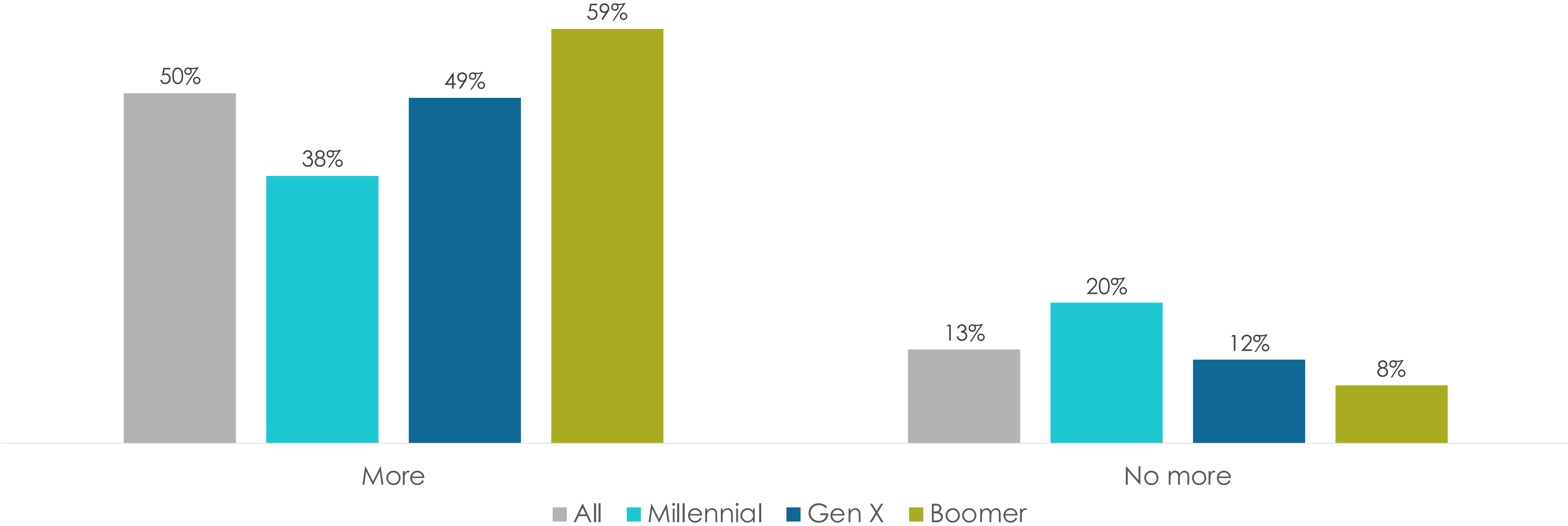
Which of the following best describes your attitude about your kitchen based on the additional time you've been spending in it?

Water Consumption



In addition to more food being prepared, 50% of respondents are drinking much more water while at home.

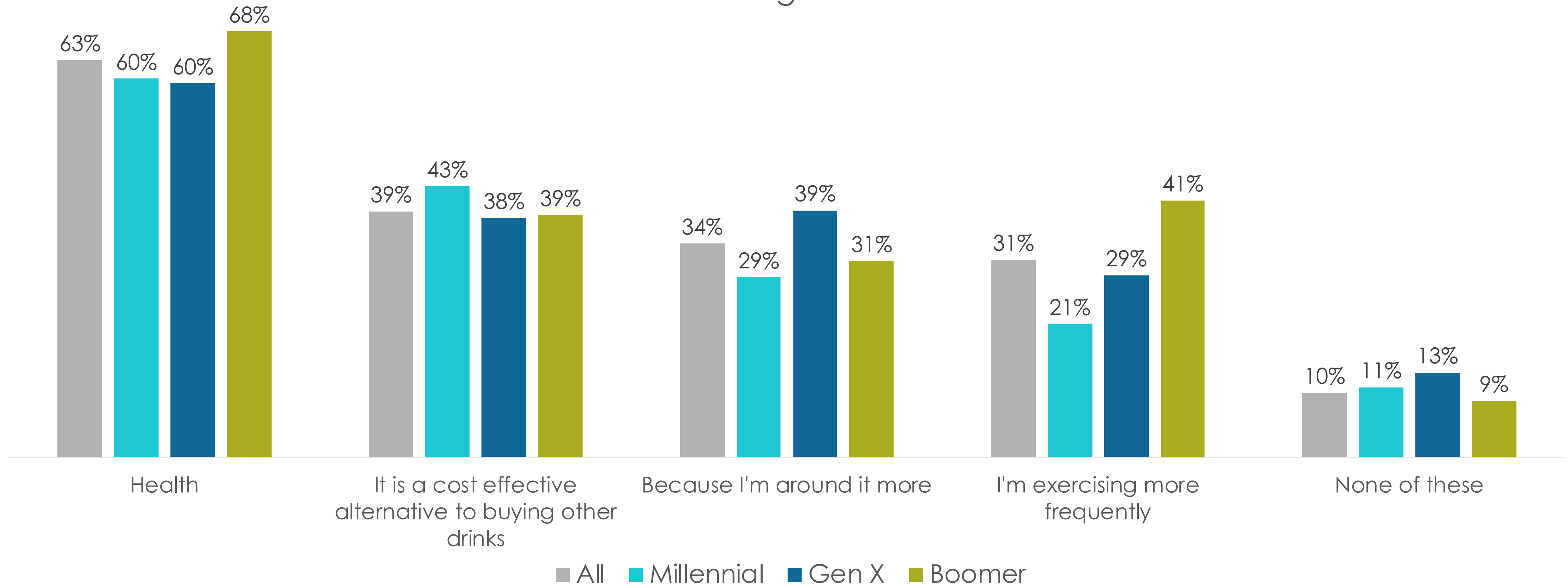
Water consumption since coronavirus outbreak



How much more water are you drinking since the Coronavirus outbreak?

63% agree that at least a portion of the motivation for consuming more water is its health benefits.

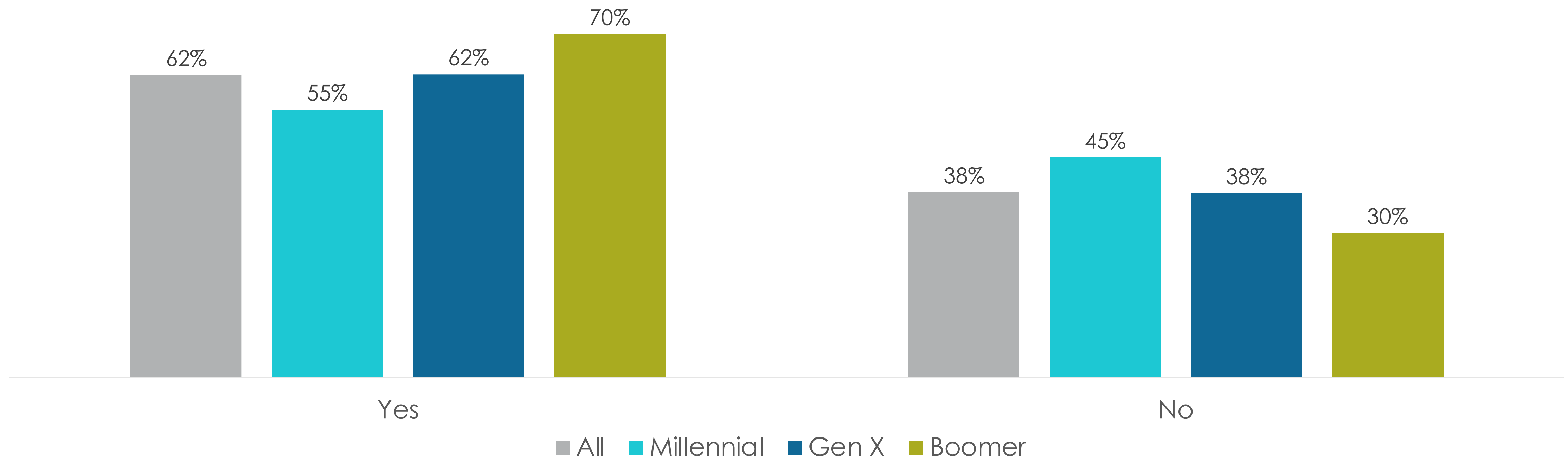
Reasons for drinking much more water



Why are you drinking more water? Select all that apply.

More than 60% are also encouraging others to drink more water because it is healthy.

Encouraging others to drink water to protect their health



Are you encouraging the other members of your household to drink more water to protect their health?

Conclusions

America continues to settle into new behaviors required by COVID-19.

- 75% of households have been impacted by coronavirus.
- More than a quarter of people have a personal acquaintance who has been infected.
- Three-quarters of respondents feel the steps they're taking will protect them.
- Confidence in the ability to develop a vaccine within a year is waning.
- More than half the people think a return to normalcy will require 2 or more months. Many (47%) will determine when the time is right for themselves.

As a result of shelter-in-place directives, people have significantly more free time which they're filling with a host of activities.

- Among the activities are hobbies (45%), the most popular of which is cooking (60%).
- It is not just the hobbyists that are cooking more at home. 88% of households are doing so.
- Surprisingly, 90% of respondents are still going into the grocery store.
- As a result of stockpiling, item and brand availability are a challenge.

Conclusions

- Through the use of substitute brands, 43% of respondents have found new brands they prefer to their usual brand.
- While hobbyist cooks are largely enjoying their time in the kitchen, 60% of those cooking at home would like a break from it.
- Only 37% like their kitchen just the way it is.

In addition to the increased consumption of home-cooked meals, 50% of respondents are drinking much more water while they're at home.

- The increase in water consumption is being driven by a number of things, with health (63%) being the most common.
- 62% of respondents are also encouraging other members of the household to drink more water.