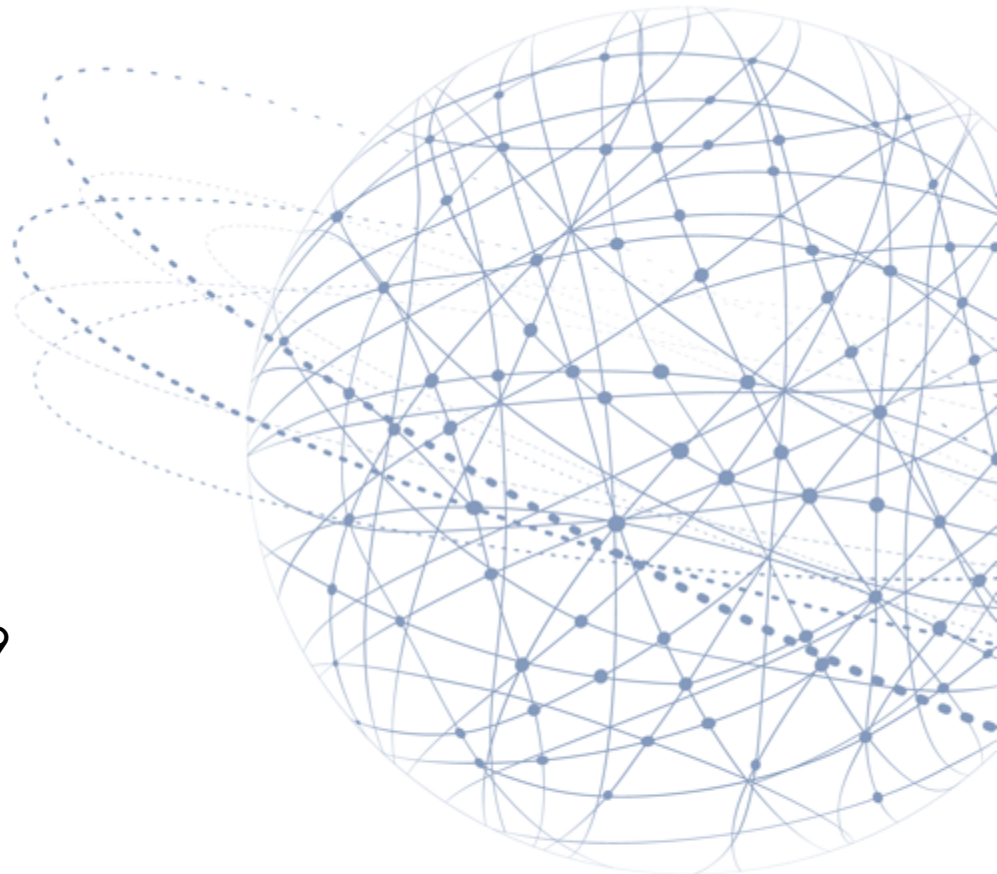




## U.S. Consumer Attitudes about COVID-19

Waves 4 & 5: Through April 16



## OBJECTIVES

- As the COVID-19 pandemic continues to spread, affecting daily life for virtually all Americans, ACUPOLL seeks to give you a window into the hearts, minds, and evolving behaviors of your consumers by posing the questions we haven't seen anyone else ask about it.
- Because the situation is rapidly evolving, we are updating our learning periodically to keep you up-to-date on trends.

## FIELD DATES – SAMPLE SIZES (Margin of error @ 90% confidence)

- |                                    |   |                  |
|------------------------------------|---|------------------|
| • March 18 – n=803 (3%)            | } | Wave I/II Report |
| • March 24 – n=819 (3%)            |   |                  |
| • March 31 & April 1 – n=1611 (2%) |   | Wave III Report  |
| • April 8 – n=982 (3%)             | } | Wave IV/V Report |
| • April 14 – n=970 (3%)            |   |                  |
| • April 16 – n=825 (3%)            |   |                  |

## SAMPLE SELECTION: REP U.S. Males and Females age 18+

## Wave 4 & 5 Key Takeaways:

### **Some bright spots**

- Enlightened about their priorities in life and increasingly valuing their relationships
- Finding thankfulness, grace, and confidence, and trying to help others as much as possible
- Eagerness to get back to the activities they love (for some)
- Willingness to make sacrifices for the greater good

### **Recognition that there may not be a “normal” to go back to**

- 76% strongly agree that current safety measures are appropriate and necessary
- Many wonder if they’ll ever feel safe in a crowded place again
- Dining out, shopping in stores, travel, and socializing with friends may never be the same

### **High expectations for brands, with some opportunities**

- Brands are expected to: provide useful information, keep me safe, make staying home easier, save me money, make donations to relevant causes, make allowances for financial difficulties
- Shoppers may be comfortable coming back *if* retailers sanitize, limit direct contact with others, and offer alternatives to in-aisle shopping
- Spending is down, even among the 2/3 who still have their full income, but the primary reason they give for this is that there’s nothing to spend their money on; the right strategies could capitalize on this and the boredom many are feeling

# What's the impact on consumer emotions?

The coronavirus and the steps taken to control its spread have already impacted Americans in many tangible ways – and we'll get to that – but first, let's look at how they're feeling about it.



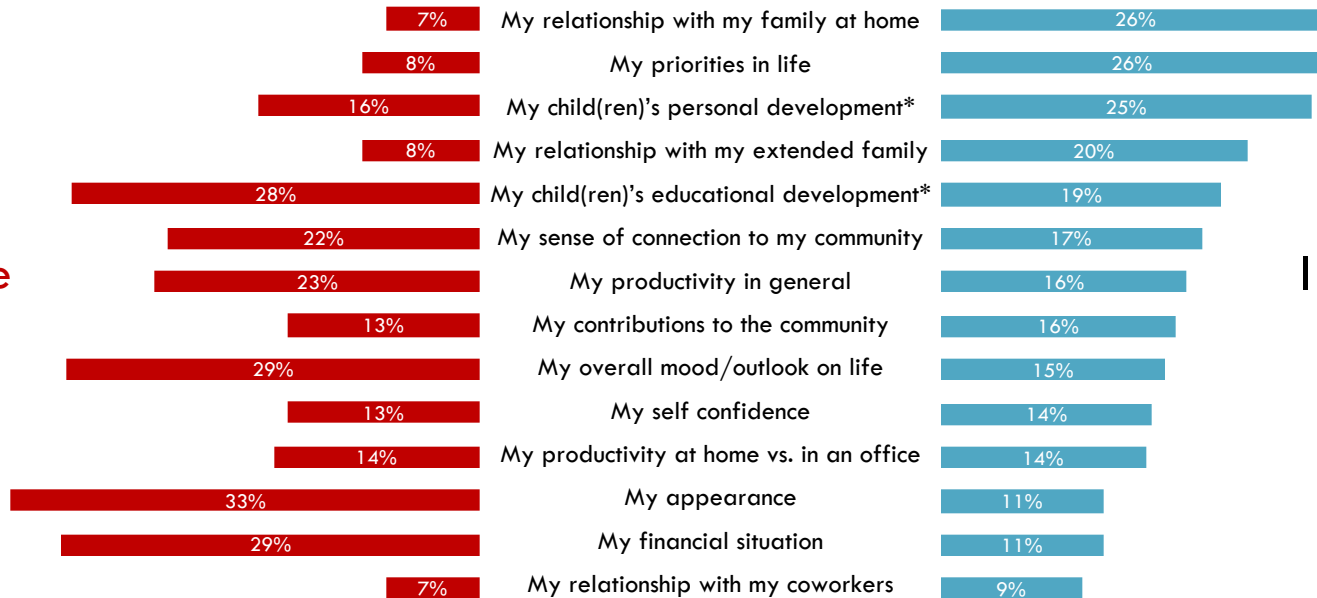


- There are silver linings to this crisis: many are feeling **better** about their new priorities, as well as their relationships with family members near and far, and their children's *personal* development.
- On the other hand, people are more likely to feel **worse** about their children's *educational* development, their overall mood, their appearance (maybe they need to dig out those beauty products – see slide 22), and especially their financial situation.

**Compared to how you felt before the coronavirus crisis, how do you feel about each of the following?**

Among Total April 16 Sample (n=825)

I feel **Worse**



I feel **Better**

**\*Among Parents**

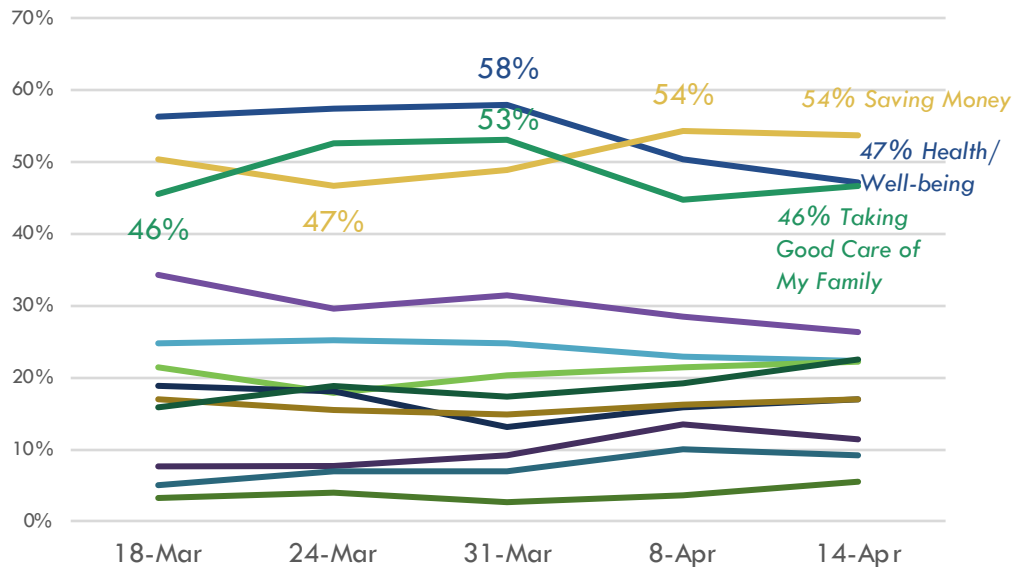
Differences of 4% are generally significant at the 90% confidence level.



## Core Motivations

ACUPOLL'S approach to understanding the deeper drivers for purchase decisions

When you're looking for products to buy, what are your TOP 3 PRIORITIES right now?



- My health/well-being
- Taking good care of my family
- Feeling more secure
- Feeling more in control
- Saving time
- Buying from companies that understand me and my needs
- Saving money
- Reducing stress
- Products that leave me feeling satisfied
- Feeling good about myself
- Buying from companies that are consistent with my values
- Making a good impression on others

Differences of 4% are generally significant at the 90% confidence level.

- As the economic consequences of Shelter in Place mount, saving money appears to be increasing in terms of priority, above personal health and family care.

- Taking care of my family looked like it was on the rise, but has dropped again.
- Meanwhile, Reducing stress is trending downward. Are consumers just steering into the curve of stress and not trying to manage it anymore?

- Other observations:

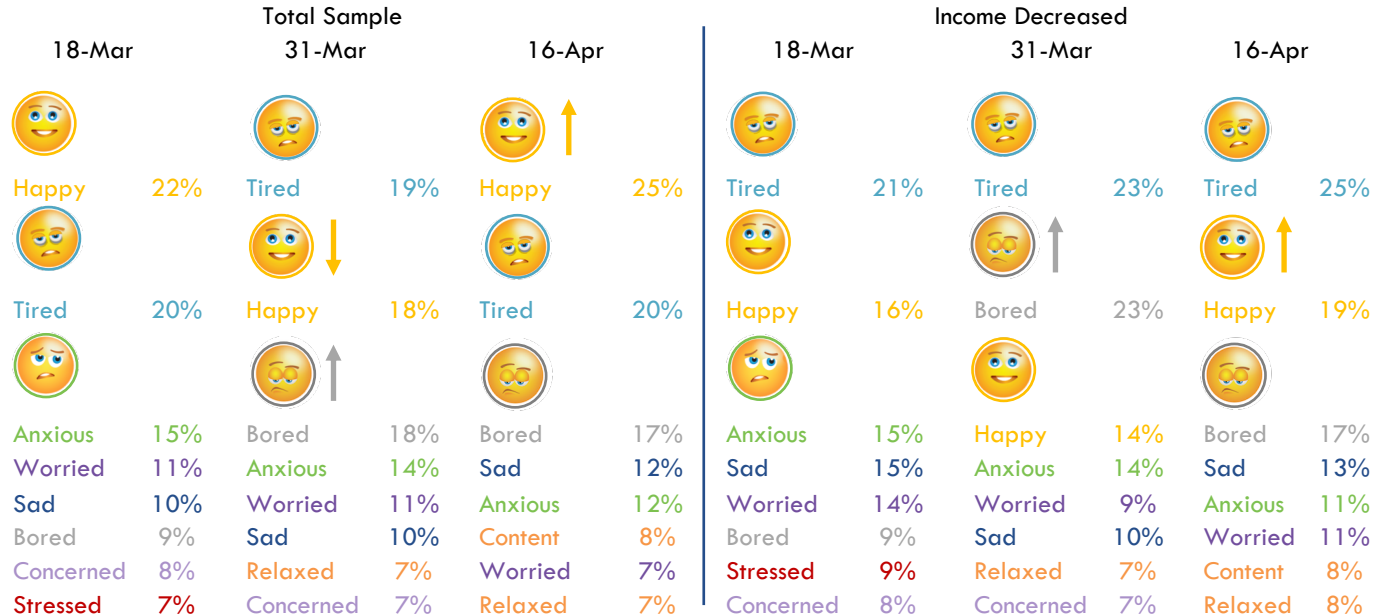
- Saving time is starting to become more important again.
- Feeling connected to brands and buying from those aligned with consumers' values, while still low priority, may be coming back.



# Happy days are here again?

- Four weeks into our monitoring of consumers' emotional state "today", mentions of **happy** are at their highest level yet; however, most people are also still **tired**, **bored**, **anxious**, **worried**, and **sad**.

### What 3 words describe your emotions today? – Top Words Mentioned (%)





We assume you're probably spending a lot more time at home these days.  
What 3 words would you use to describe how you feel about your life at home in this environment?





- While being stuck at home can be boring and lonely, people are making the best of it, appreciating how their lives have come into balance, and taking time to be kind whenever possible – to others and themselves.



*What are you doing these days that makes you feel the most self-confident, sense of pride, or feeling of accomplishment?  
(Open-End Comments)*

Everything about my life has come into balance now that I'm not overscheduled.

I've been trying to tackle projects around the house, like cleaning and organizing closets and getting rid of unwanted items.

Just keeping it together and not breaking down (crying, arguing with my husband, etc.). I'm proud of myself for doing that.

I am holding our family together by engaging them in activities they never participated in before, like cooking and homeschooling.

Helping in any way I can. Giving my groceries to an elderly woman in the market. I would have never done this before. This has changed me for the better.

Taking care of 2 kids. They are 6 years of age different, so handling a toddler, at-home schooling, and providing both their needs is definitely something to feel proud about as a mother.

Without having to drive to work, I have more time for things.

Little things that make my kids smile through all this. Continue making my home a safe yet fun place for them. Helping my kids process their feelings.

Thinking of innovative ways to accomplish things without the same opportunity to get supplies.

When I'm at a grocery store, I stop to thank the people stocking the shelves for their hard work.

Taking time to get quality rest, to reflect, to exercise, to make home-cooked meals, to spend time with my family

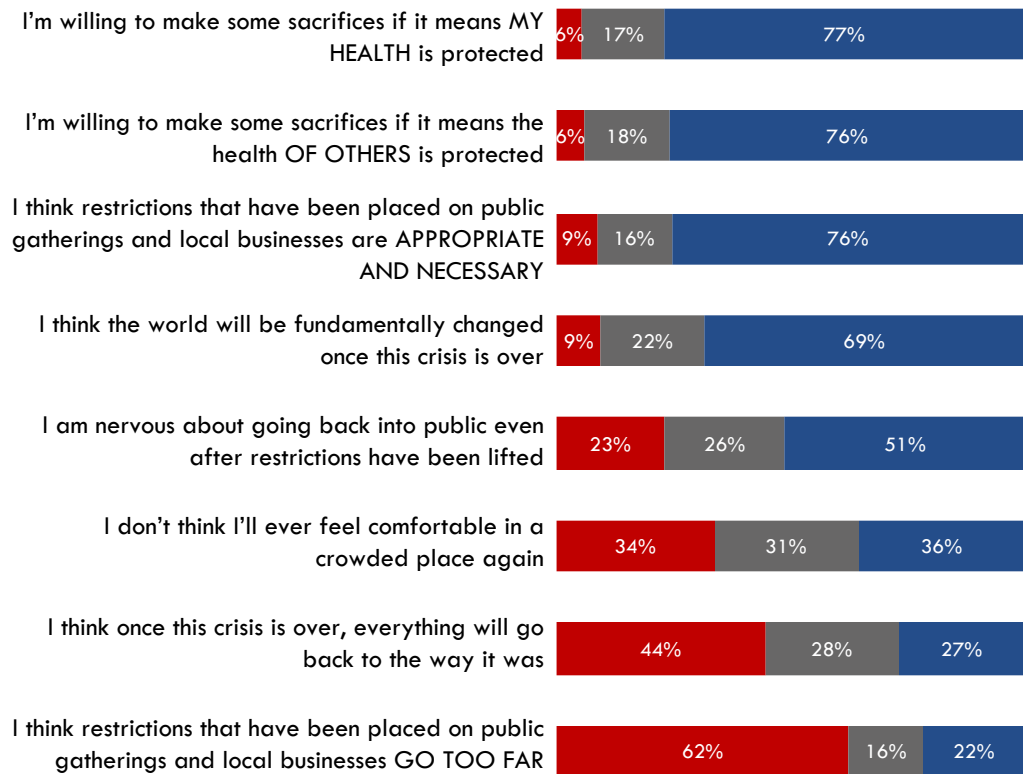
*Just a selection of verbatims we hope will inspire – ask us for the full set*



- Encouragingly, respondents are just as likely to make sacrifices to protect others' health as their own, and most feel that shelter in place orders are appropriate and necessary.
- However – 9% do not think these measures are appropriate, and 22% think they go too far, indicating that support for the recent protests we have seen are more than a fringe sentiment at this point.
- Consumers also generally feel that the world will be **fundamentally changed**, and two-thirds express some concern about feeling comfortable in a crowded place in the future.

How much do you disagree or agree with each of the following statements?  
 0=Disagree Strongly, 10=Agree Strongly, or anywhere in between.

Among Total April 16 Sample (n=825)



■ Disagree (0-3) ■ Neutral (4-6) ■ Agree (7-10)

Differences of 4% are generally significant at the 90% confidence level.



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

0=Disagree Strongly, 10=Agree Strongly, or anywhere in between.

Among Total April 16 Sample (n=825)

- While many are getting tired of staying home all the time, most haven't run out of things to watch on Netflix (yet).
- Supporting local restaurants has been embraced by only about one-third of respondents, with another third agreeing somewhat, suggesting they could be encouraged to do this more.
- New product trials during this time are just as likely to be from variety-seekers as those who can't find what they're looking for.

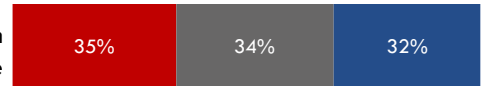
I am getting tired of staying home all the time



I've been making an effort to support local restaurants by ordering carry out as much as possible



I have been trying new products more often because the brands I usually buy aren't available



I have been trying new products more often just to get some variety in my life



I am running out of things to watch on streaming services



■ Disagree (0-3) ■ Neutral (4-6) ■ Agree (7-10)

Differences of 4% are generally significant at the 90% confidence level.

# What's the impact on consumer buying habits & opinions?

We know what's happening at the macro level, but how do consumers want advertisers to behave, and what wishes and trade-offs are behind the items flying off grocery store shelves?





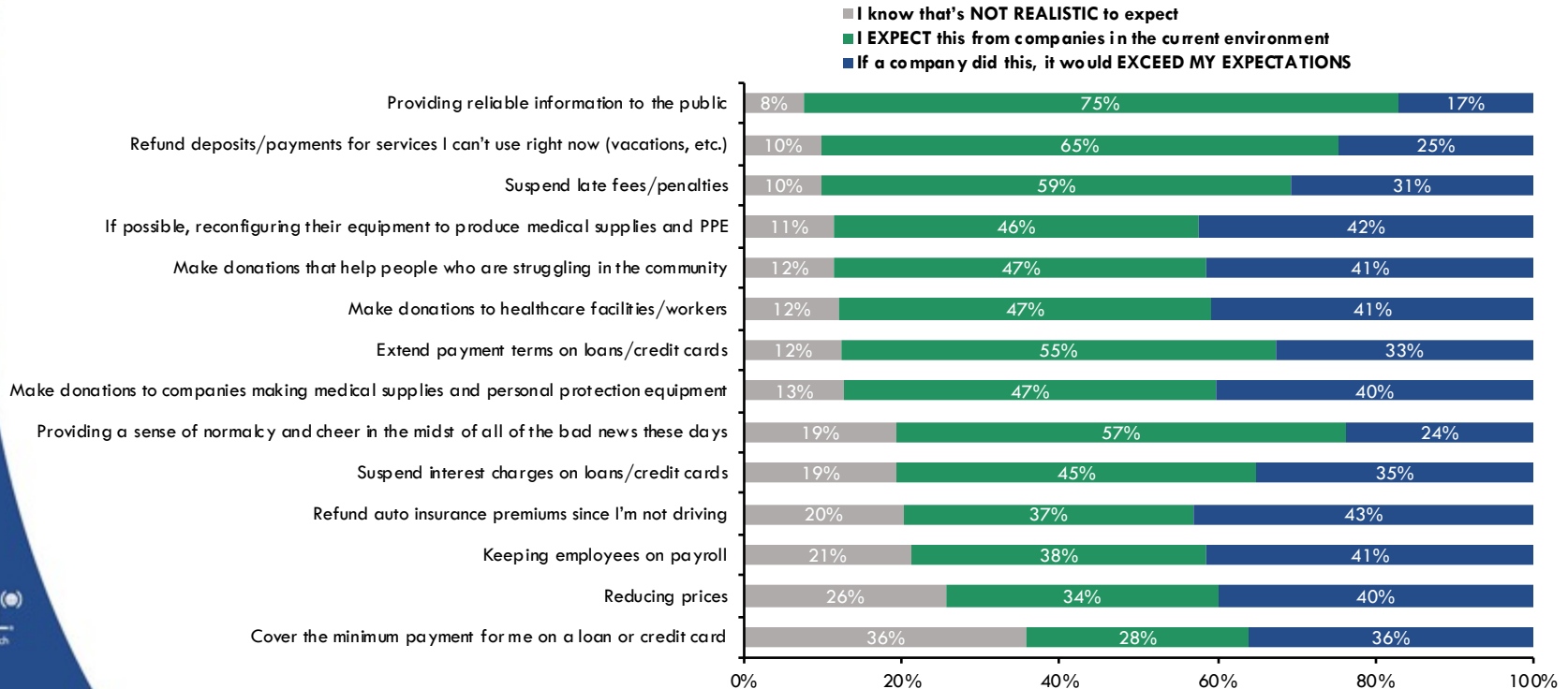
How do you think advertisers should change their commercials due to what's going on, if at all?	Open-end	Select All		
	March 18-31 (n=2425)	April 1 (n=808)	April 8 (n=982)	April 14 (n=970)
<b>Yes - should change (net)</b>	<b>57%</b>	<b>90%</b>	<b>89%</b>	<b>82%</b>
Encourage social distancing/good hygiene	5%	46%	47%	42%
Help make staying home easier (Delivery, ways to stay occupied)	4%	42%	43%	41%
Offer discounts	1%	36%	37%	41%
Acknowledge what's going on	9%	40%	35%	35%
Help people who are struggling financially	3%	34%	35%	35%
Show how you are helping the community	2%	--	35%	34%
Stop advertising activities that can't happen now (restaurants, vacations)	7%	32%	31%	33%
Tell us how you're helping protect my health and well-being	4%	35%	35%	32%
Be compassionate/reassuring / Encourage kindness	7%	40%	40%	32%
Tell me how you're helping to fight the spread of coronavirus	3%	37%	35%	31%
Use humor to help people cheer up	2%	30%	36%	31%
<b>Nothing/No (Keep things as normal as possible)</b>	<b>32%</b>	<b>23%</b>	<b>22%</b>	<b>27%</b>
Stop talking about coronavirus so much		14%	16%	16%
DON'T do anything special – just proceed with business as usual		9%	6%	10%

- As the COVID-19 crisis wears on, consumers continue to want to see advertisers play a positive role in addressing it.
- As of April 14, the main messages they are looking for are encouraging social distancing and good hygiene, the ways in which brands are making it easier to stay at home, and offering discounts.
- Still, around one-quarter wouldn't recommend any changes happen at all, and/or are tired of hearing about it.

- **Consumers want/expect Companies to respond to the crisis in a lot of ways.**

- Companies could **exceed expectations** through DONATIONS (of PPE, or money to organizations or people who need help).
- The **bare minimum** expected by more than half of consumers is providing reliable information to the public, providing refunds on pre-paid services, if applicable, and suspending late fees.

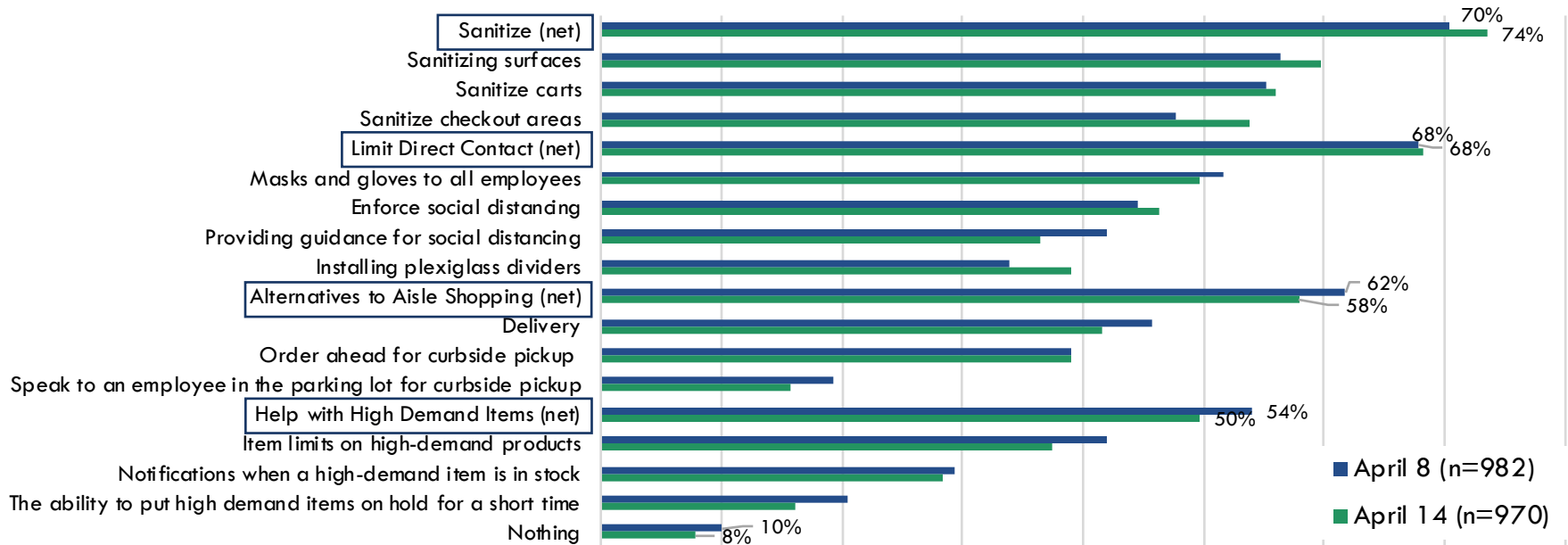
*What is your opinion of the following different ways companies could react to the Coronavirus?*





- **Increasingly, the main thing that customers want in order to feel safe shopping in stores again is having surfaces sanitized – the degree to which this sanitization process is clearly visible to shoppers will likely aid greatly in their comfort.**
- They'd also like to see ways to limit direct contact between people, alternatives to aisle shopping, and help with high-demand items.
  - The relative importance of these last two may be decreasing, as store environments become less frantic, and supply chains fill back in.

*Which of the following would make you more likely to shop at a retailer these days?*



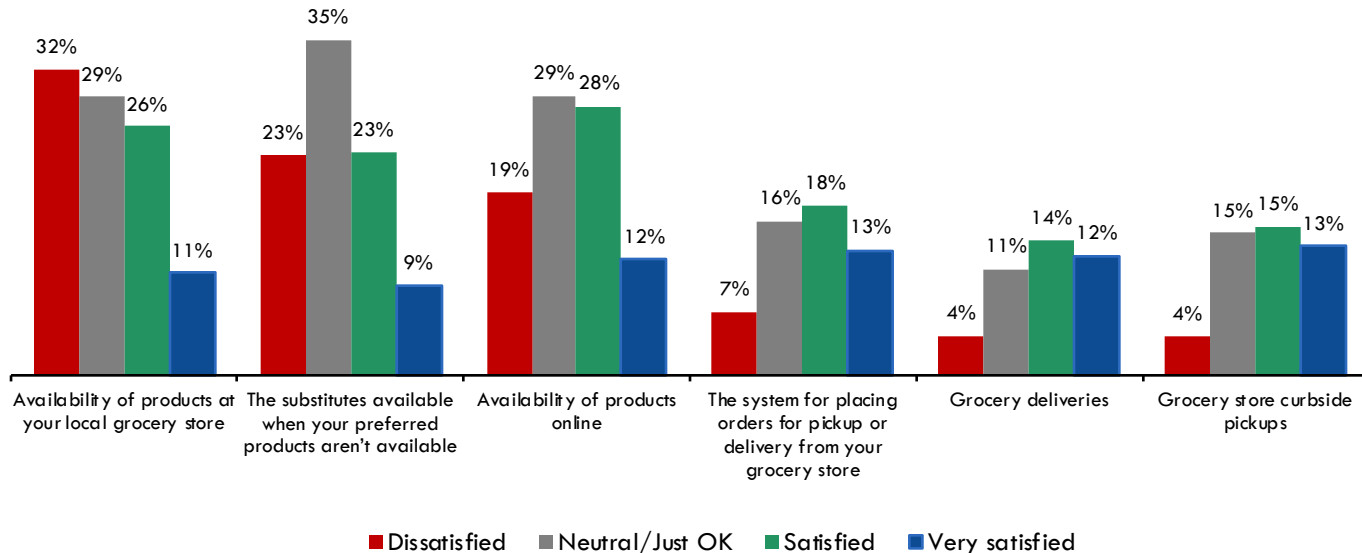
Differences of 4% are generally significant at the 90% confidence level.



- Product availability (in-store and online) and substitutes still have fairly high levels of dissatisfaction, even as supply chains have had an opportunity to catch up with demand.
- Meanwhile, those who have used curbside pickup or delivery of groceries tend to be satisfied (or at least neutral), suggesting likely continued use post-crisis.

**How SATISFIED have you been with each of the following in the past few weeks?**

Among Total April 16 Sample (n=825)



Differences of 4% are generally significant at the 90% confidence level.



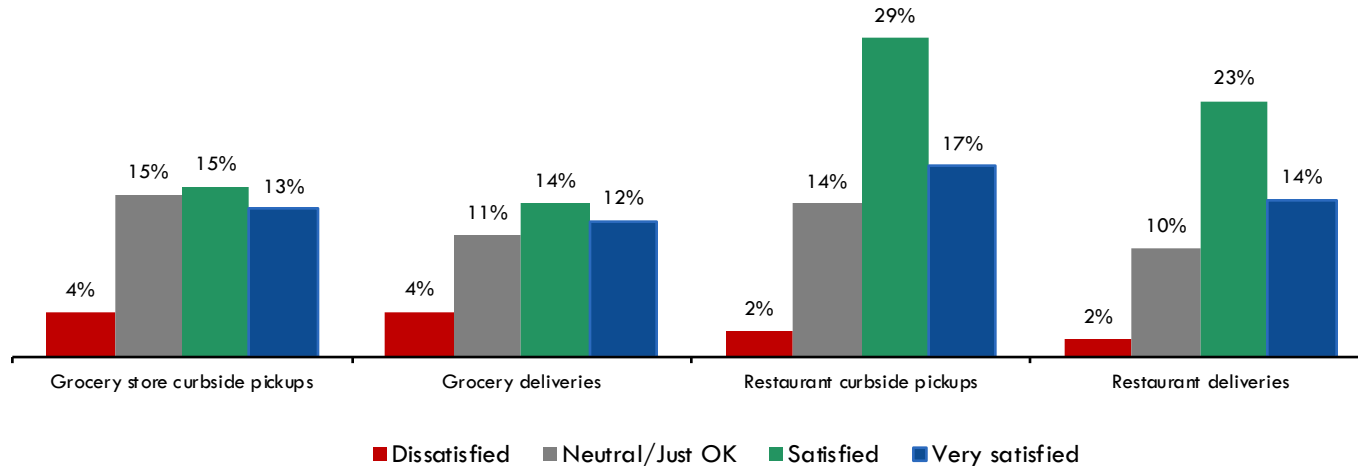


- **Restaurants are meeting needs for many.**

- While consumers have been generally satisfied/neutral when it comes to grocery stores, restaurants offering curbside pickup may be another unsung hero of the pandemic, with 46% of respondents (and 74% of those who've used it) indicating they're satisfied.

*How SATISFIED have you been with each of the following in the past few weeks?*

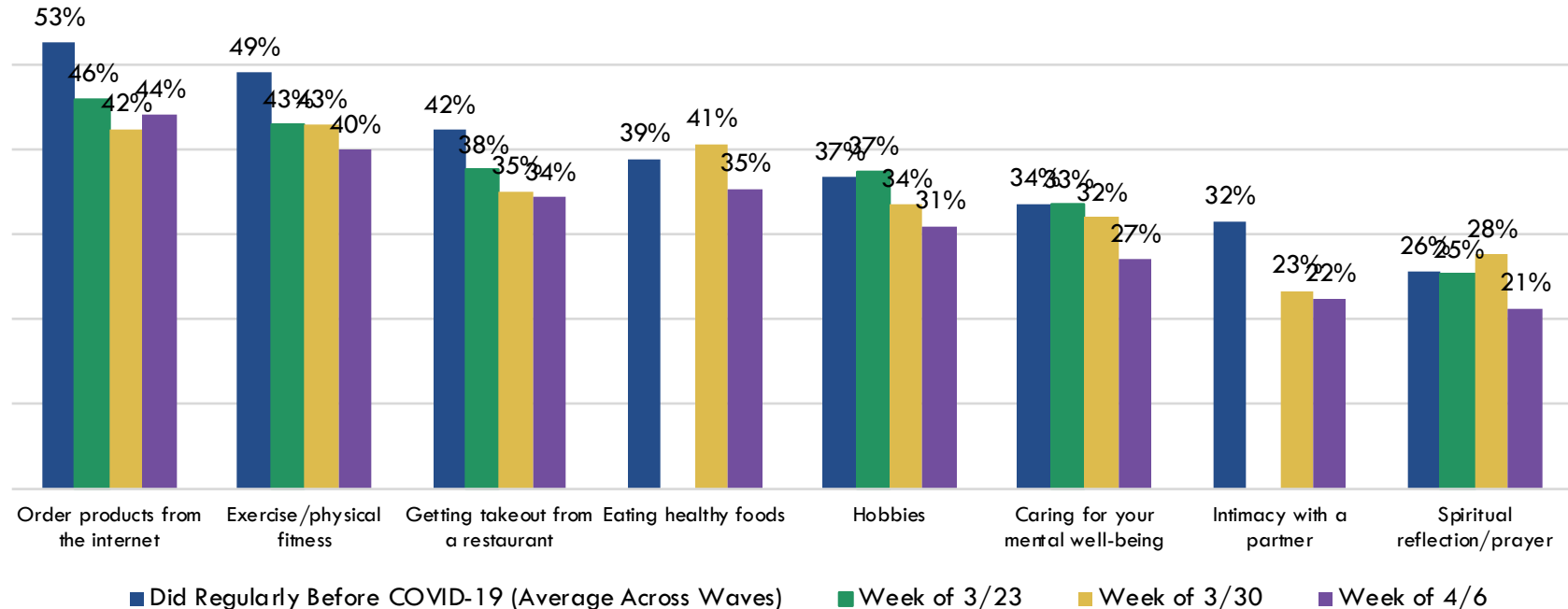
Among Total April 16 Sample (n=825)



Differences of 4% are generally significant at the 90% confidence level.

## What behaviors seem largely unchanged, when comparing last week's behavior to the weeks before the crisis?

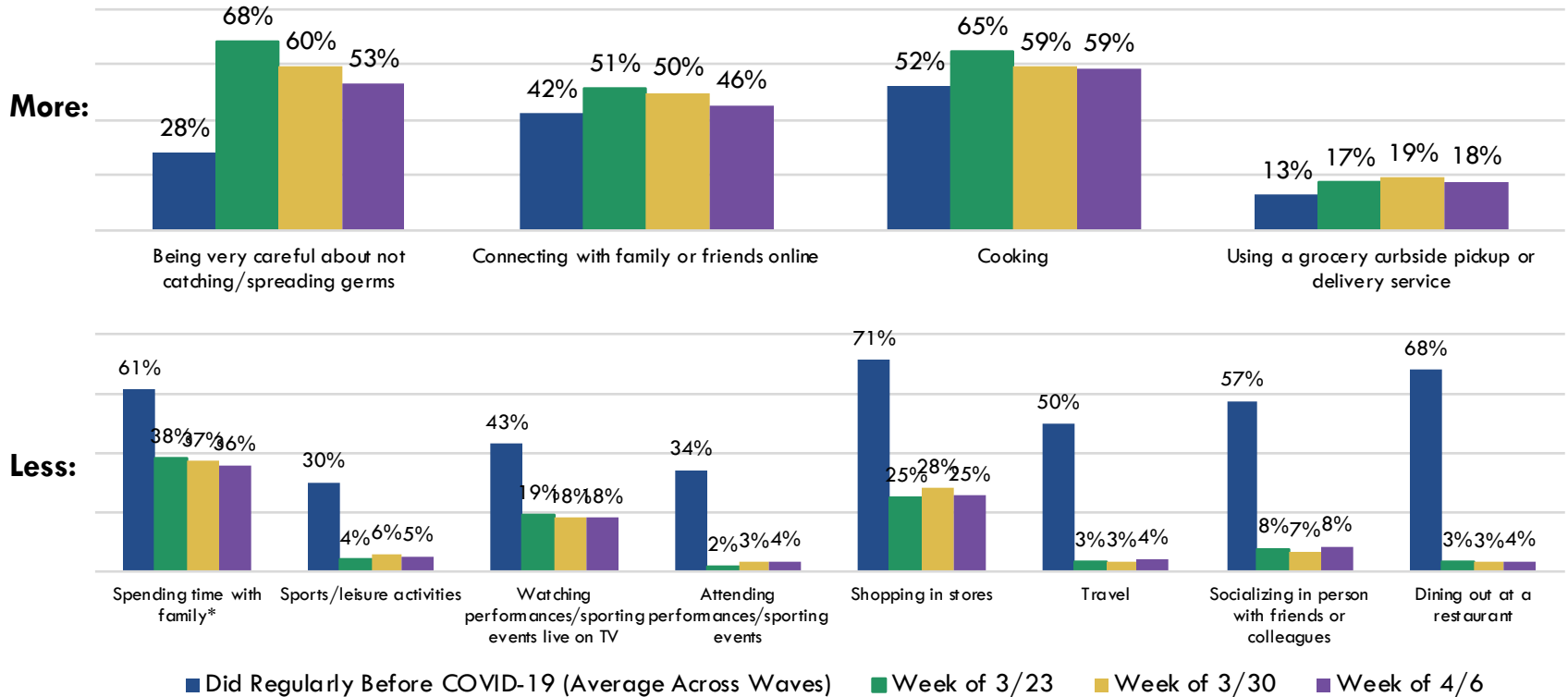
- In recent weeks, fewer and fewer people have been online shopping, exercising, or getting takeout, but considering the difference in time frames, it seems like these behaviors are still pretty consistent.
- It seems like the surge seen we're hearing about in these activities is largely from people who were already doing them, but doing them more often, rather than new participants.



Differences of 4% are generally significant at the 90% confidence level.

## What behaviors have changed?

- We are encouraged that reported behavior shifts reflect a social distancing-based lifestyle.



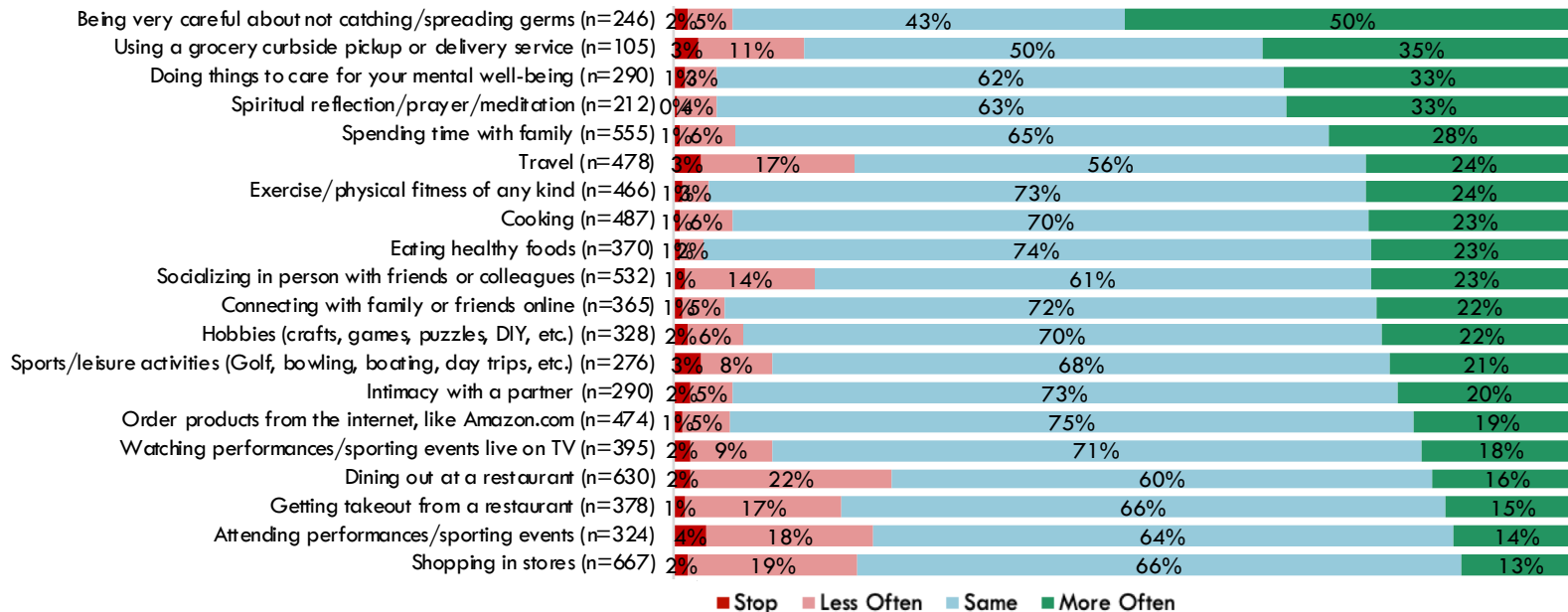
Differences of 4% are generally significant at the 90% confidence level.

\*We assume this was interpreted as extended family by some – all indications are that individual households are spending more time together.

- **Similar to the previous wave, more than 20% of those who used to participate in travel, sports events/performances, dining out, and shopping in stores plan to do those things less often after the crisis – at least “at the moment” with the crisis top of mind.**
  - Some of this may be due to financial uncertainty, but customers may also be looking for reassurance that these activities are safe again.
  - In every category, brands will battle to gain momentum among the enthusiasts, and offset or regain the trust/confidence of the resisters, and these activities are likely to be even more volatile, meaning that winning among those who plan to continue them will be more crucial than ever.

*After this crisis is over, how OFTEN do you think you'll do each of the following, compared to what you did before the crisis?*

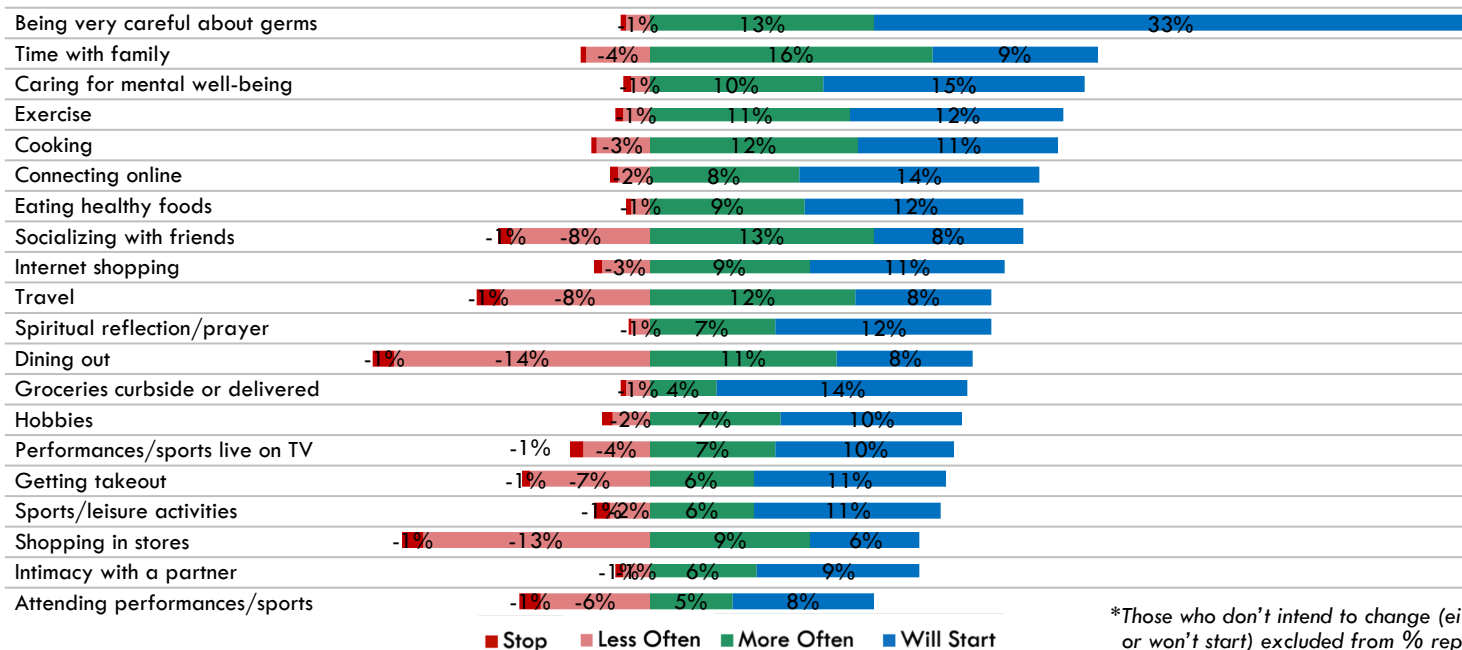
*Among Those Who Regularly Did Each Before Crisis – April 14*



- Furthermore, also consistent with the previous wave, looking at the total sample instead of just those who were doing these activities regularly before the crisis, the % of consumers who plan to *start* shopping in stores/dining out, or doing so more often, isn't enough to offset those who say they will do these things *less often* or *stop*.
  - Travel and live entertainment/sports seems a little less susceptible to losses, with more consumers saying they will start than will stop.
- Instead, the future will be even more about meaningful connections with others and ourselves.
  - In addition to being more careful about germs, new habits that are likely to be picked up include caring for one's own mental well-being, grocery pickup/delivery, connecting with loved ones online, spiritual reflection/exercise, and prayer.

*After this crisis is over, how OFTEN do you think you'll do each of the following, compared to what you did before the crisis?*

Among Total April 14 Sample\* (n=970)



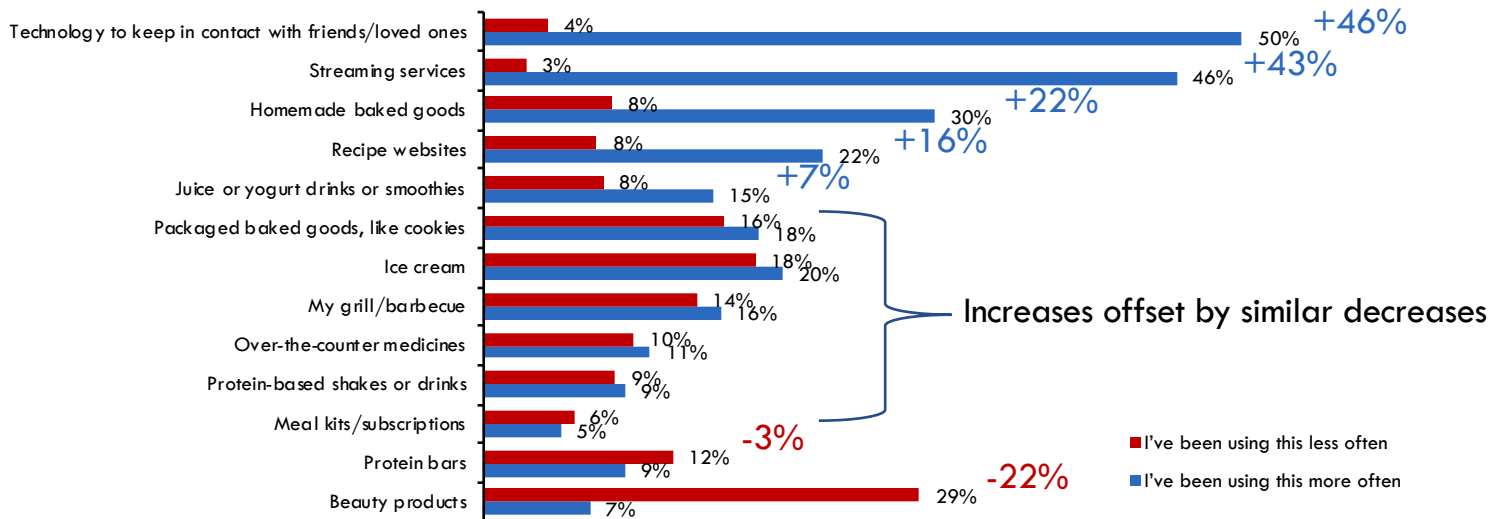
\*Those who don't intend to change (either will continue, or won't start) excluded from % reported.

Differences of 3% are generally significant at the 90% confidence level.

- The products people are using at home are changing as well – we’ve all heard about the increased usage of virtual meetings, streaming services, homemade baked goods, and recipe websites, but didn’t realize that juice drinks/smoothies were on the rise as well.
- Beauty product usage is way down – not surprising given less social and professional visibility, but an early indicator of what may be a sluggish reboot for the category, and a challenge to the idea that women use beauty products just for themselves.

*Since the beginning of the coronavirus crisis, how would describe your USAGE of each of the following?*

Among Total April 16 Sample (n=825)

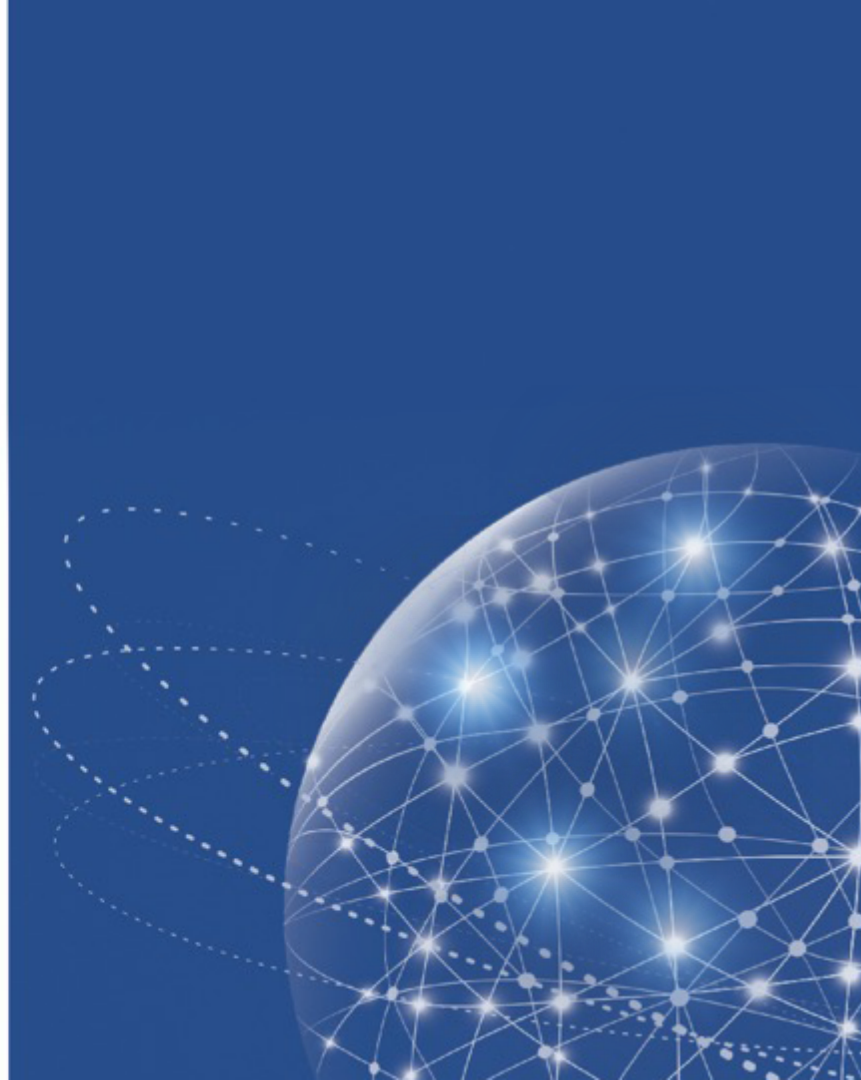


Differences of 4% are generally significant at the 90% confidence level.

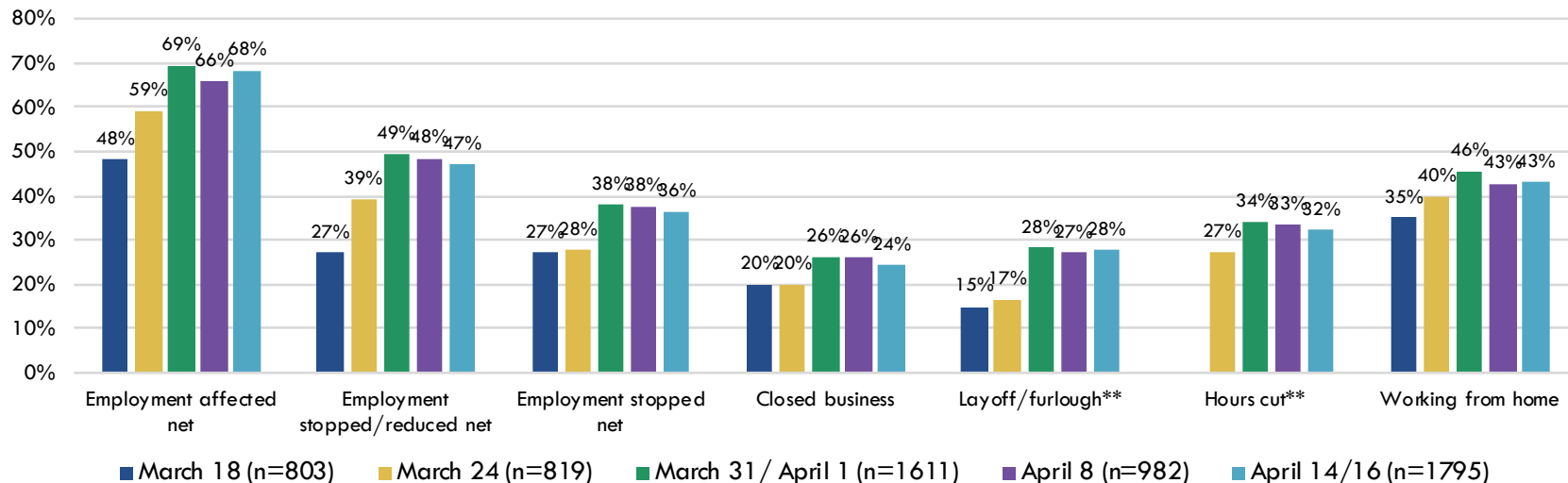
Note: N/A and “Same” excluded from % reported

# How are economic changes influencing consumers?

Unemployment numbers never tell the whole story.



- While unemployment claims are still catching up, the number of employees impacted by the shutdown measures, appears to have at least stabilized for the moment.
- **Two-thirds** of American workers have had their employment impacted in some way.
  - We assume that many of the other third are also impacted, but haven't lost work or been shifted to work from home, because they fulfill an essential role in healthcare, food supply, delivery, etc., or live in localities with fewer restrictions.



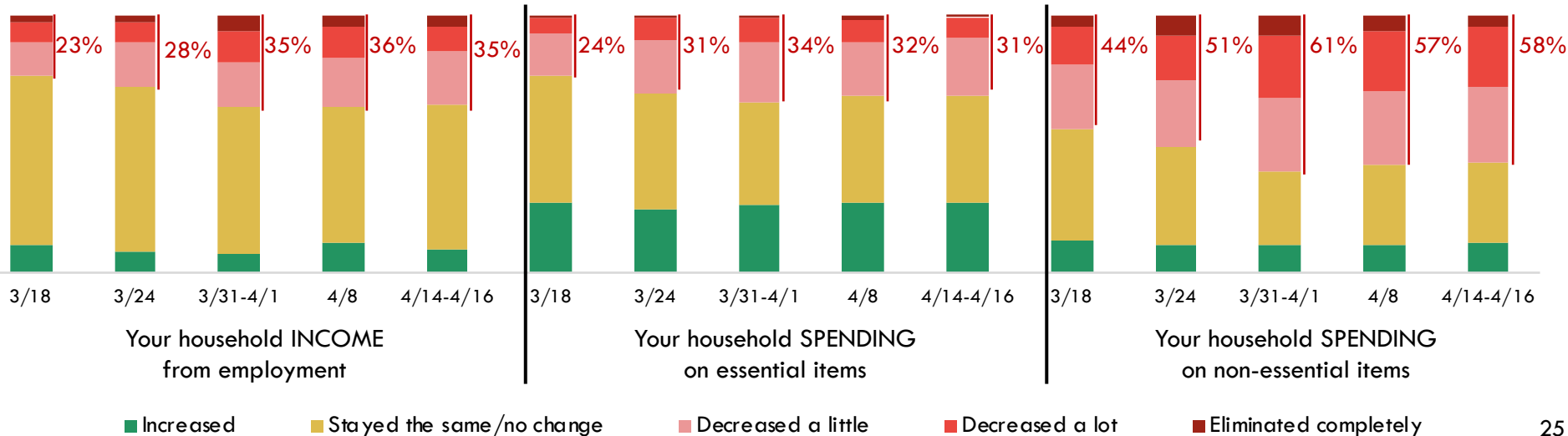
\*\* "Furlough" added on 3/31 "Hours cut" added on 3/24  
 Differences of 4% or greater are significant at the 90% confidence level.





- **35% of the total population have now experienced at least some income loss – and around 60% have decreased their non-essential spending.**
- Around 30% have even decreased what they consider to be “essential” spending.
- Similar to job loss figures, these numbers appear at least to not be getting any worse since late March.

*How much, if at all, has each of the following CHANGED since before recent events?*



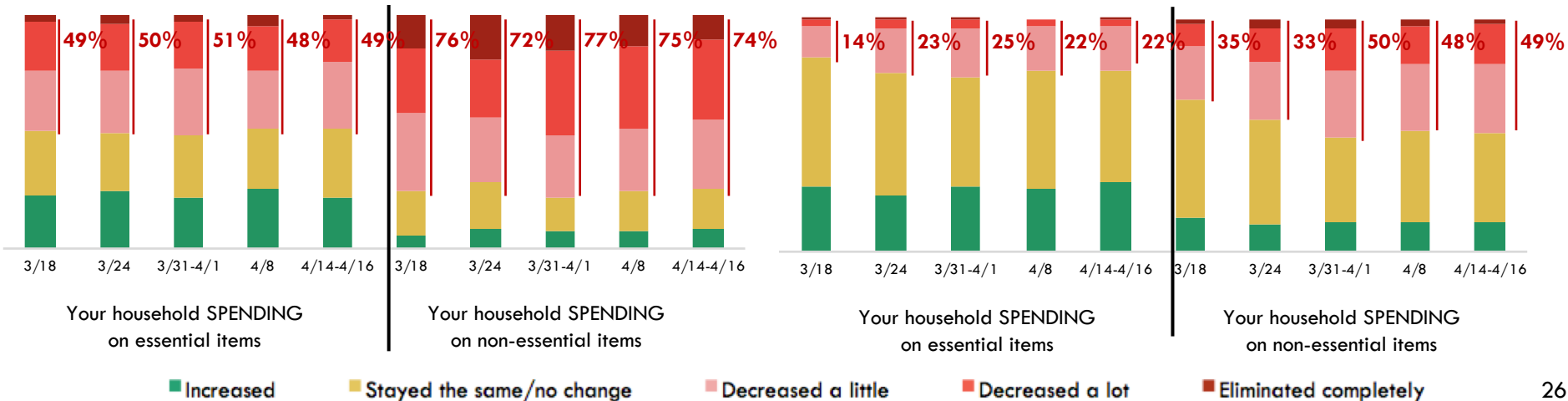


- Those with a loss of income have generally curbed their spending on essential and non-essential items alike even more, although some have had to increase their spending on essential items.
- While those without a loss of income have so far generally not been reducing their spending as much, they are definitely starting to spend less, as well.
  - See the next slide for some exploration into why that is.

*How much, if at all, has each of the following CHANGED since before recent events?*

**Have Experienced A Loss of Income (23-35% of Sample)**

**Have Not Experienced A Loss of Income (65-77% of Sample)**



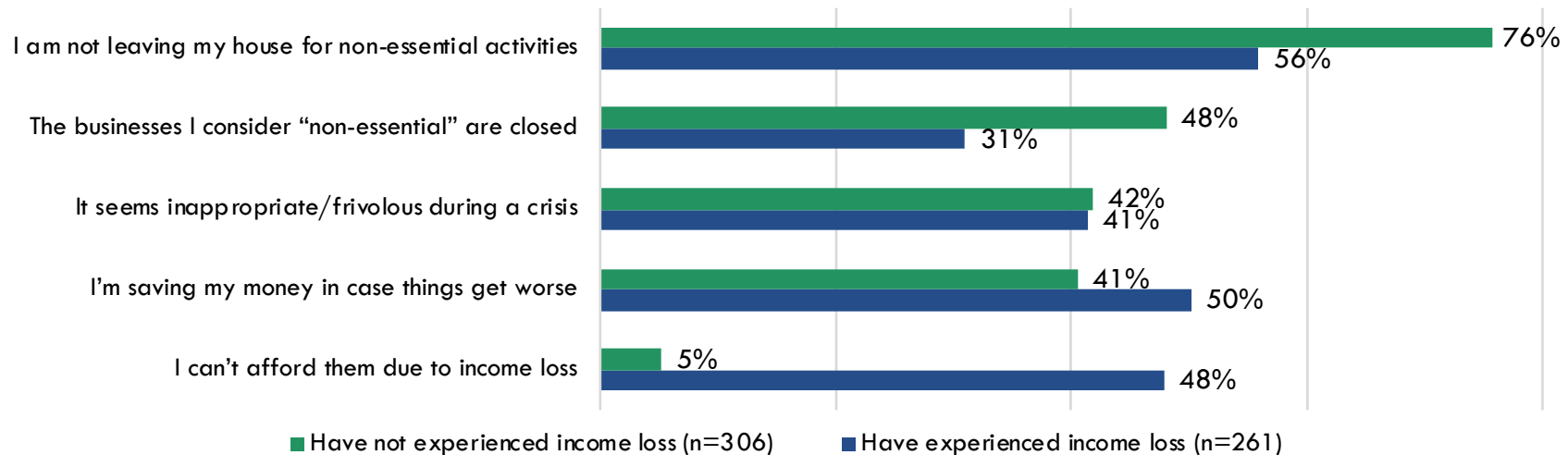
- **At-home purchases and experiences, offered tastefully, appear to be a prime opportunity to keep businesses afloat for the duration of this crisis.**

- The primary reasons for spending less are social distancing/not leaving the house, and non-essential businesses being closed, particularly among those who haven't had an income loss.

- **Reassurances about the future may help as well.**

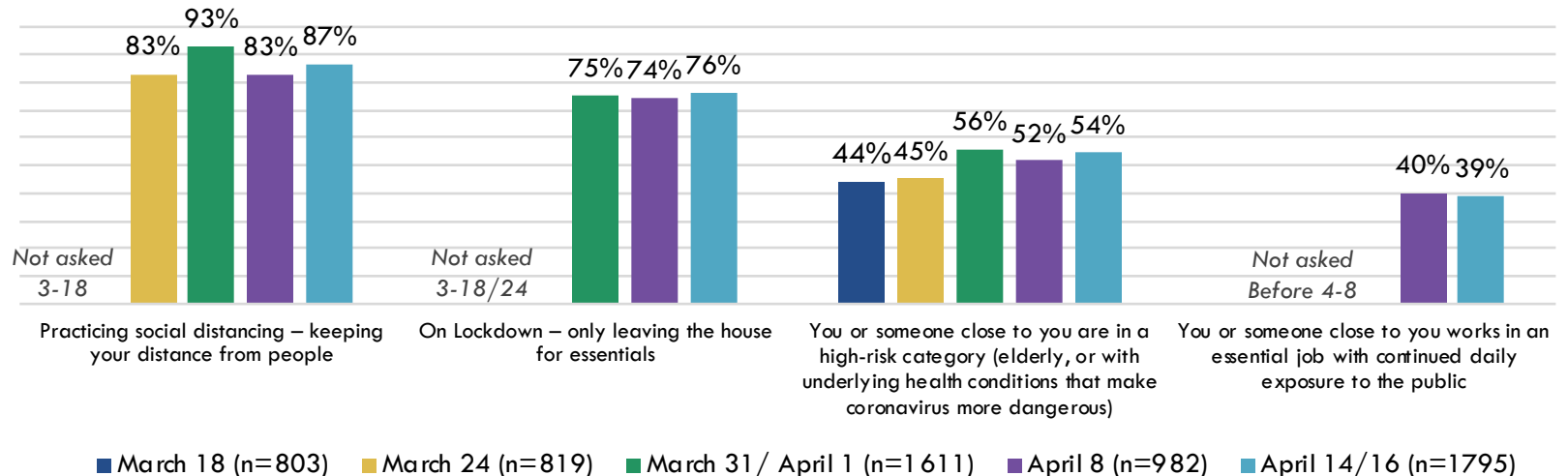
- Many are also spending less due to worry about the future, and just feeling like non-essential spending is inappropriate at this time.

*You indicated you're spending less on non-essential items these days. Why, specifically, is that?*



- **The number of consumers practicing social distancing is fluctuating from week to week, with a minimum of 83% reporting that they are doing so.**
  - And, most of those who are social distancing essentially consider themselves to be on lockdown.
- **Over 50% consider themselves or a loved one to be in a high-risk category.**
- **And, 40% of consumers have a job or loved one that risks exposure on a daily basis.**

*Which of the following changes have you or someone in your household experienced due to recent events?*



Differences of 3% are generally at the 90% confidence level.

# PRIOR REPORTING

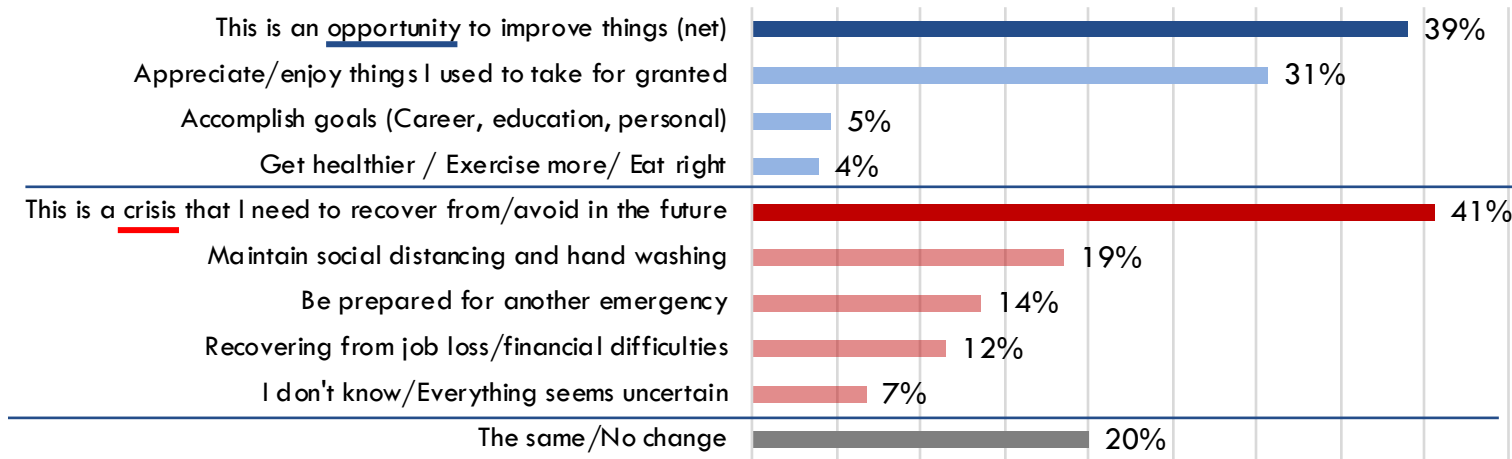
Data captured in earlier waves – interesting reading if you didn't see those previous reports.



- **Priorities are likely to shift for 80% of consumers based on this crisis, but how they will shift differs greatly.**

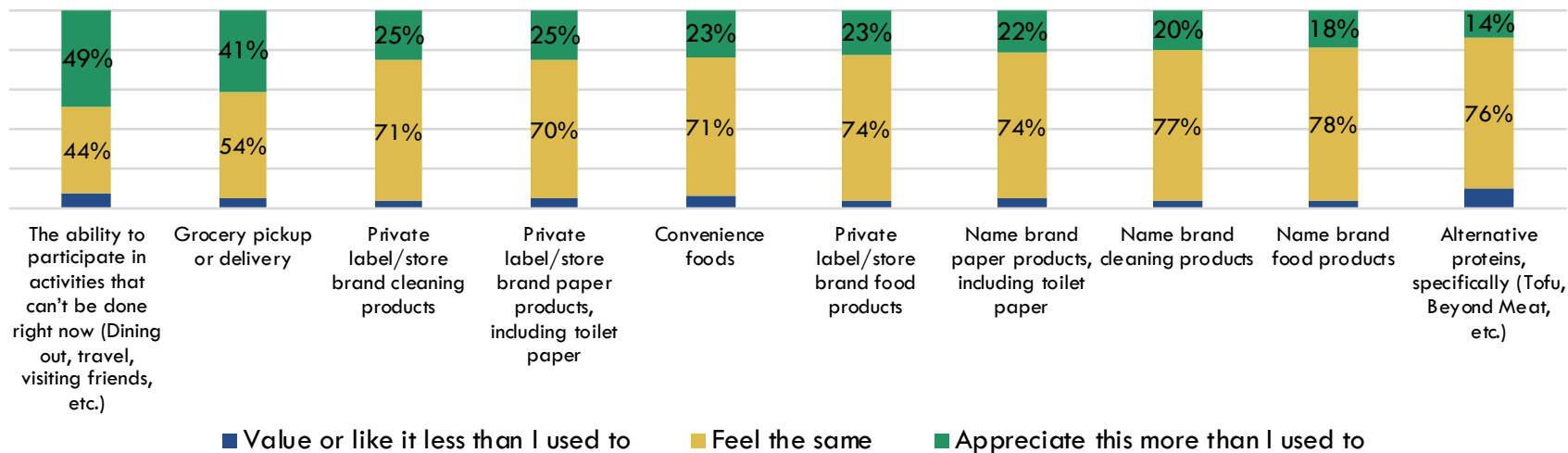
- About half of those who will change appear to see this as an **opportunity** to reset, and enjoy or accomplish the things they hadn't before.
- Meanwhile, the other half plan to be more **prepared** in the future, and/or have had their priorities shifted for them due to losing their job, or uncertainty.

*After this crisis is over, what new priorities do you think you'll have?*  
(Open-End)



- **Close to half of consumers have a new appreciation for activities they can't do anymore, and for grocery pickup/delivery services.**
- This also appears to be a time to strengthen old loyalties and build new ones, with around 20% or more of consumers showing heightened appreciation for private label and name brand products alike.
  - In past economic crises, total CPG revenue rebounded post-crisis, but the share gains of Private Label brands during the recession stayed elevated as well.

*How would you say you feel about each of the following, compared to how you felt before recent events?*



Among Total Sample, April 1, 2020 (n=808)

# What good things, or positives, do you think are happening, or will happen, as a result of the coronavirus crisis? (Open-End Comments)



*Just a selection of verbatims we hope will inspire – ask us for the full set*



## More time with family/at home:

People will spend more time with their immediate family and become closer.

People will get to work on things at home or take a break when previously they may not have had time to.

People spending more time with their families and slowing down a bit

More people are experiencing a lot more family time. I see more families out walking together instead of alone.



## More focus on what's important:

It is making people realize just how blessed they really were to start with I have reprioritized what is important to me I think families and people in general are coming closer together and helping each other Its a shame that it took a crisis in order for that to happen

More appreciation of our opportunities to interact with family, friends and the general public without distancing restrictions.

We will stop idolizing stars, sports figures, and influencers. We will appreciate our police, EMTs, doctors and nurses more.

People recognize what is and is not important - "things" less important than people and connections



## Positive impact on the environment/the planet:

The world is becoming healthier

Nature will recover and reboot

The climate crisis/ environment is improving since everyone is stuck in side

The ecosystem is becoming cleaner thanks to the absence of humans to ruin it.

The reduction of green house gases is the silver lining now that there are fewer flights and factories have ground to a screeching halt.



## Less division in the country:

People started working together more, both parties in the Federal government started working together more

I think people have come together well. I have seen a lot more positivity during this all than negativity.

I feel a sense of compassion and community will continue. I think a lot of new government and employer rules will be put into place and maybe a lot of the "red tape" will be removed from some of the things we need.

Hopefully our country won't be so divided.

Humanity's better angels are everywhere and visible.

People are coming together and many people are helping neighbors especially the elderly

I am hoping people will be more open and accepting of other people and be kinder to each other.



## What inspirational stories have you heard about companies rising to the challenges of the current crisis?

(Open-End Comments)

Just a selection of verbatims we hope will inspire – ask us for the full set



**A central theme of what consumers notice and appreciate is companies offering discounts/free services.**

Restaurants are providing meals to doctors and nurses, airlines are flying doctors and nurses to help in other parts of the country

The team of people who have started 3D printing ventilators.

Ford Motor Company stepping up to build ventilator equipment

Some companies are offering free or discounted items to first responders. Also opening specific hours for seniors should help out.

Companies that voluntarily changed over to produce needed items like sanitizer and facemasks. Medical staff working long and hard in virus areas.

Retrofitting factories to help make ventilators, making and donating masks, paying their employees even when they're not working, providing child care to first responders, lunches to hungry school kids

A pizza shop who donated pizza to families

I received free data for my phone from Verizon and Duke Energy of the Carolinas aren't going to disconnect power if you can't pay your bill

Well, a restaurant around my area has been giving free meals to the elderly

A clerk paying customers' bills

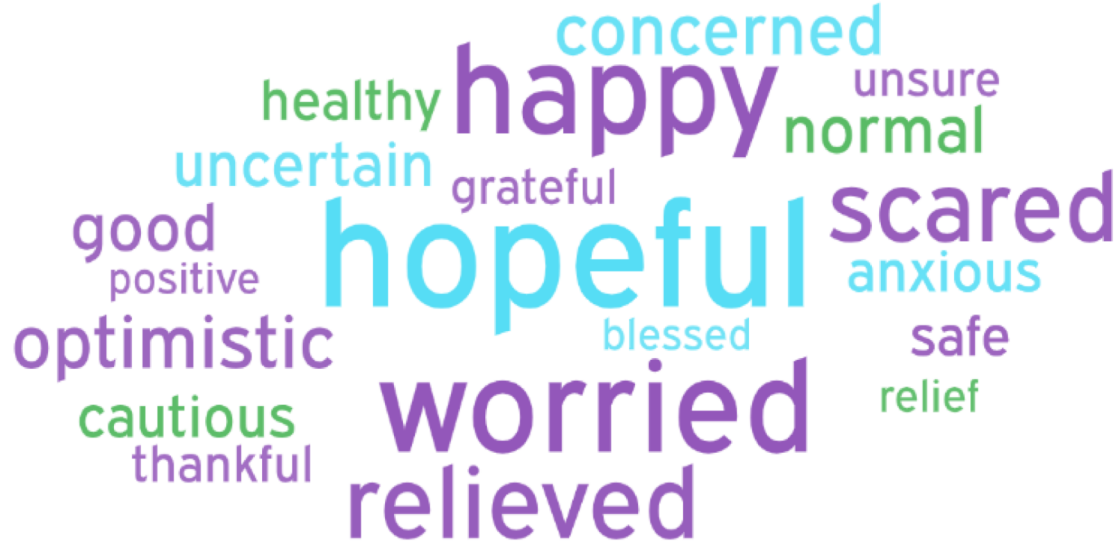
CEO of a company not taking any salary so he could pay employees full salary



- Thinking about the future, consumers are worried, but cautiously hopeful.



*What 3 words would you use to describe how you feel about you and your family's future, after the coronavirus crisis has passed?*



- **After the crisis is over, people want to get “going!”**

- They mention going out with family and friends, travel, going to restaurants, and going shopping, as well as other activities that just get them “out” of the house.

*Please tell us some specifics about the activities you are the most passionate about continuing after the crisis is over.*



Top 25 words – March 31, 2020 (n=803)



- **Consumers generally indicate that the Internet, hand sanitizers, toilet paper, food, and wipes are their heroes right now.**
  - A few specific brands get shout-outs: Netflix, Amazon, Zoom, Clorox, and Lysol.
  - And others specifically mentioned workers, particularly grocery store employees, healthcare workers, and delivery people.

*What product or products have been the “unsung heroes” of the coronavirus crisis for you and your family?*

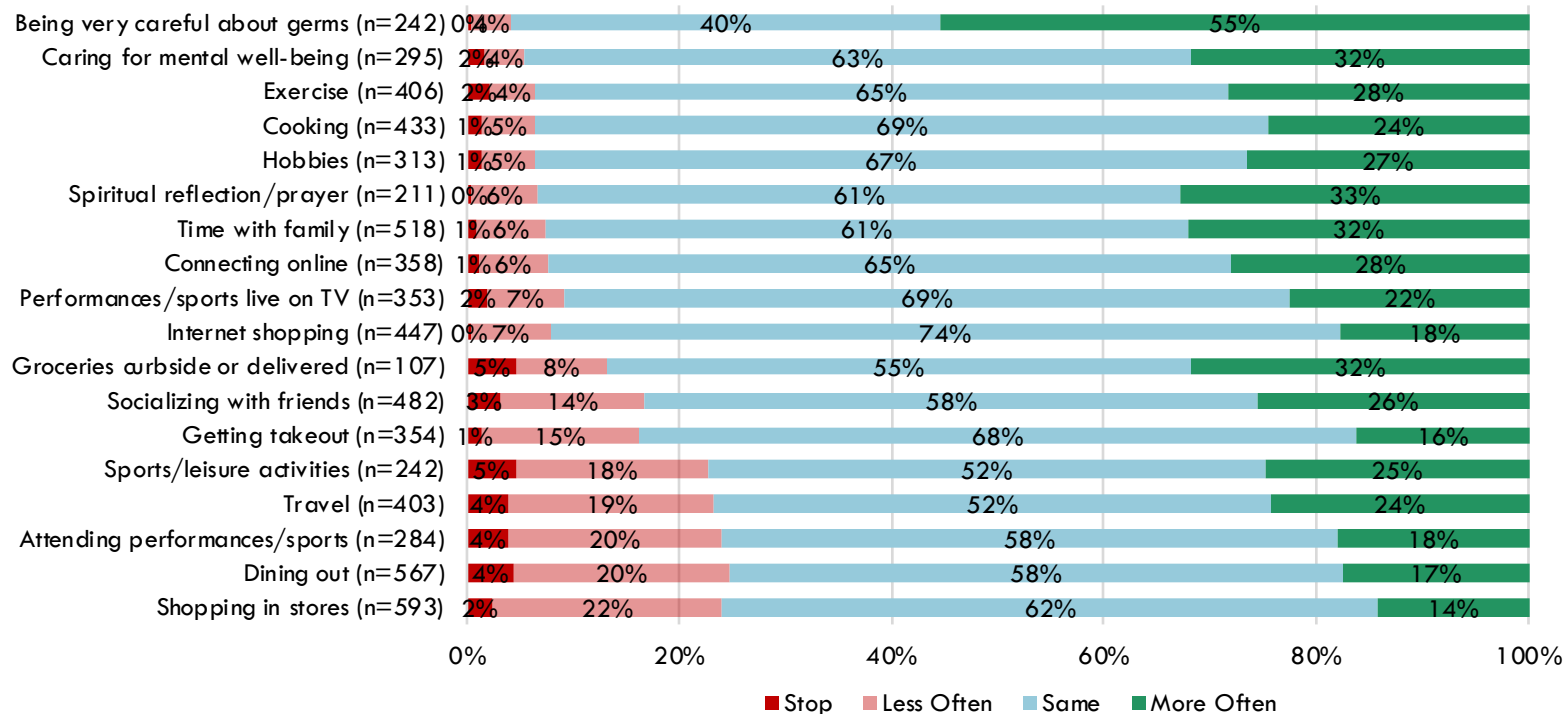


Top 25 words – March 31, 2020 (n=803)

- **More than 20% of those who used to participate in sports/leisure activities, travel, sports events/performances, dining out, and shopping in stores plan to do those things less often after the crisis, at least at the moment with the crisis top of mind.**
  - Some of this may be due to financial uncertainty, but customers may also be looking for reassurance that these activities are safe again.
  - In every category, brands will battle to gain momentum among the enthusiasts, and offset or regain the trust/confidence of the resisters, and these activities are likely to be even more volatile, meaning that winning among those who plan to continue them will be more crucial than ever.

*After this crisis is over, how OFTEN do you think you'll do each of the following, compared to what you did before the crisis?*

*Among Those Who Regularly Did Each Before Crisis*



- Furthermore, looking at the total sample instead of just those who were doing these activities regularly before the crisis, the % of consumers who plan to *start* shopping in stores/dining out, or doing so more often, isn't enough to offset those who say they will do these things *less often* or *stop*.

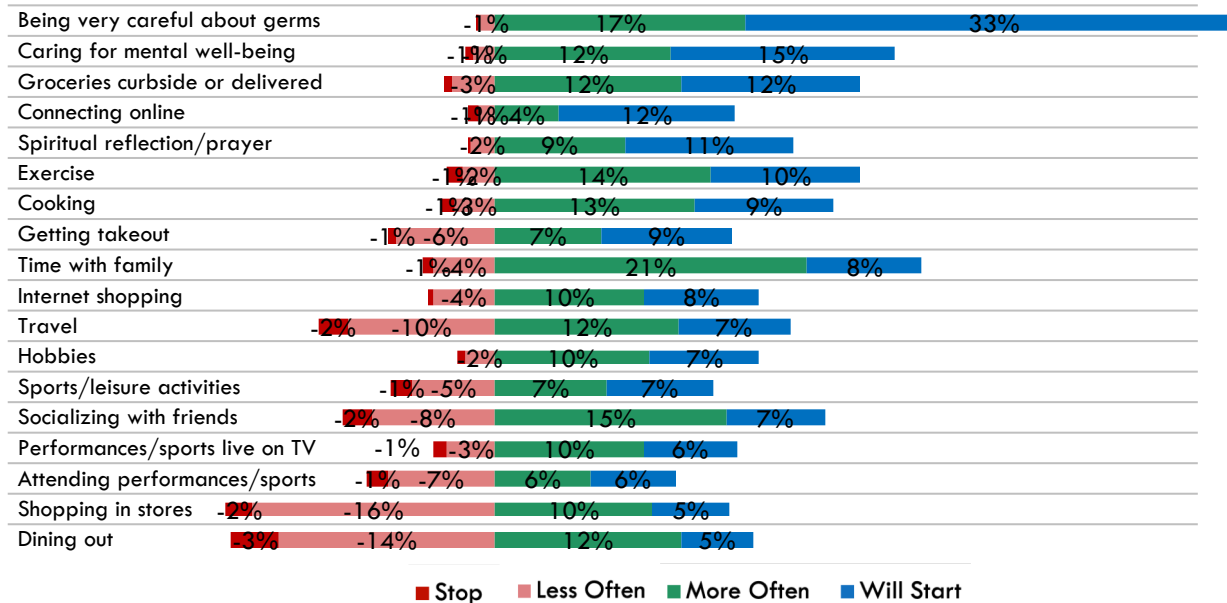
- The travel industry seems a little less susceptible to losses, with more consumers saying they will start than will stop.

- Instead, the future will be even more about meaningful connections with others and ourselves.

- In addition to being more careful about germs, new habits that are likely to be picked up include caring for one's own mental well-being, grocery pickup/delivery, connecting with loved ones online, spiritual reflection/exercise, and prayer.

*After this crisis is over, how OFTEN do you think you'll do each of the following, compared to what you did before the crisis?*

*Among March 31 Total Sample (n=803)*



- 81% of those who have lost income have actually lost their job or at least some hours – a sobering statistic, but equally troubling is the fact that the other 19% are still technically employed, but have lost income.
- Parents are more likely to have had an employer close than the total sample, and may be feeling the pinch of added responsibilities, since their kids are almost certainly home from school as well.
- Those in High Risk and Not High Risk are equally likely to have lost employment, while those in high-risk categories are less likely to be working from home.
  - We suspect that some who consider themselves “high risk” are in a position to catch the virus, not necessarily that they are higher risk for dangerous consequences. We’re going to be more specific in the next wave.

**Which of the following changes have you or someone in your household experienced due to recent events?**

	March 31 / April 1	Parents	HH Income decreased	HH Income not decreased	High Risk	Not High Risk
n=	1 611	546	569	1042	898	713
Sig.Diff.†	3%	5%	5%	4%	4%	4%
<b>Employment affected net</b>	<b>69%</b>	<b>81%</b>	<b>89%</b>	<b>59%</b>	<b>65%</b>	<b>75%</b>
<b>Employment stopped/reduced net</b>	<b>49%</b>	<b>61%</b>	<b>81%</b>	<b>32%</b>	<b>48%</b>	<b>52%</b>
<b>Employment stopped net</b>	<b>38%</b>	<b>47%</b>	<b>64%</b>	<b>24%</b>	<b>37%</b>	<b>40%</b>
An employer has closed	26%	33%	46%	15%	24%	28%
A household member has been laid off	28%	34%	51%	16%	28%	28%
A household member has had their hours cut	34%	43%	59%	20%	35%	33%
<b>Working from home net</b>	<b>46%</b>	<b>54%</b>	<b>41%</b>	<b>48%</b>	<b>42%</b>	<b>51%</b>
An employer has started ALLOWING you/your family member(s) to work from home	38%	44%	35%	40%	36%	42%
An employer has started REQUIRING you/your family member(s) to work from home	35%	44%	31%	38%	32%	40%

**Blue: significantly higher than Total Sample**

**Red: significantly lower**



## Since most people are staying home, what else are they doing more often?

### • Cleaning

- (Sanitize all the things!)

### • Watching new shows or movies and exercising

- Keeping their minds and bodies engaged

### • Cooking

- Much more likely to be turning to comfort foods or snacks than trying out new recipes, though

### • Using social media

- Parents in particular are using social media for information, perhaps from local parent groups about school at home.
- Parents are also more likely to be participating in activities for the care, feeding, and education of their kids.
- Those who've experienced a drop in income are more likely to be cleaning and cooking more, connecting on social media, spending time with family, taking time for themselves, and spending time in prayer/reflection.

## Which of the following activities are you doing MORE OFTEN now than you did before recent events?

	Total Sample	Parents	HH Income decreased
	n= 1622	488	417
	Sig.Diff.† 3%	5%	6%
<b>Average Number of Increased Activities:</b>	<b>4.7</b>	<b>5.7</b>	<b>5.5</b>
Cleaning	44%	46%	50%
Watching new shows or movies	42%	45%	47%
Exercising or walking	34%	34%	36%
Cooking	35%	41%	42%
Eating comfort foods	30%	31%	31%
Watching old familiar shows or movies	31%	33%	33%
Using social media to connect with people	28%	35%	35%
Using social media to get information	30%	38%	36%
Snacking	30%	35%	34%
Playing games	28%	37%	34%
More one-one time within the family	26%	41%	37%
Doing things to care for your mental well-being	22%	22%	29%
Hobbies	21%	25%	25%
Spiritual reflection/prayer/meditation	18%	20%	25%
Trying new recipes	17%	21%	19%
Arts and Crafts	12%	17%	15%
Teaching my kids	9%	27%	11%
Being intimate with a partner	8%	13%	12%
Other (Reading, watching the news mentioned)	6%	3%	4%

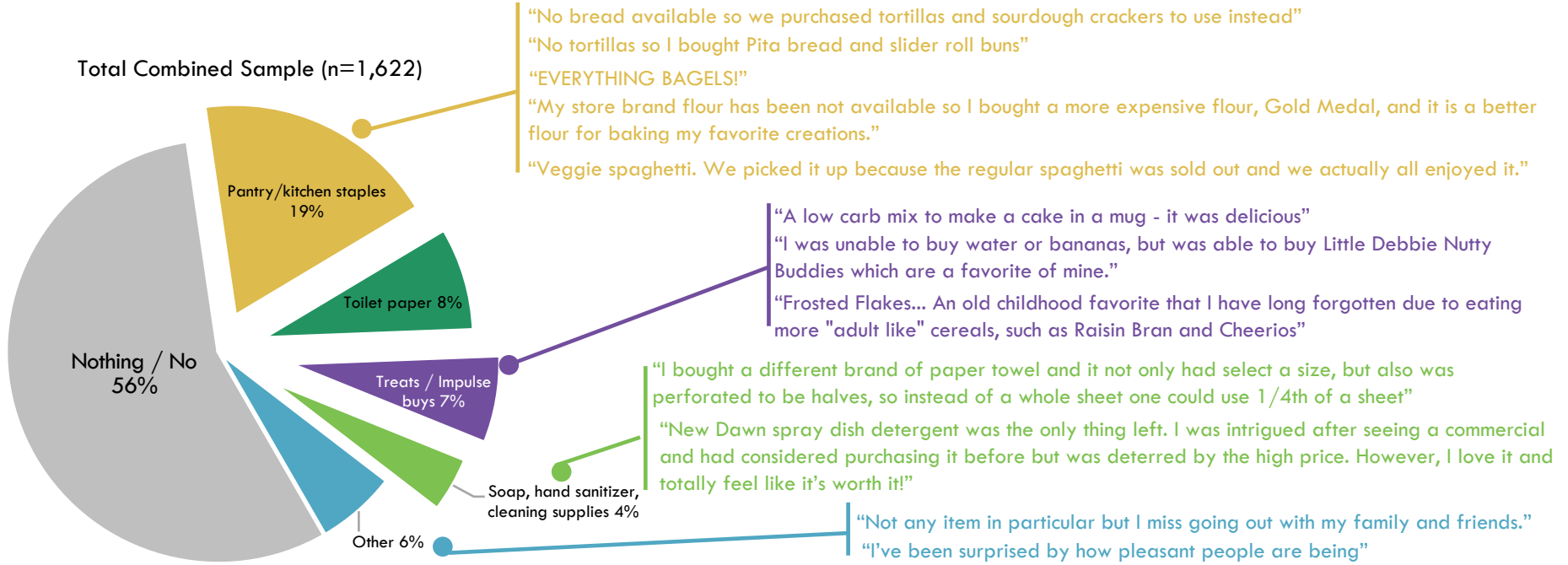
Answers basically identical across two weeks of testing so far.

Blue: significantly higher than Total Sample



- As many as 44% of consumers have branched out and tried something new, suggesting this may be a time for some experimentation and indulgence, and to build new loyalties.

Many people have recently experienced their favorite items being out of stock. What, if anything, have you bought recently to make up for something being out of stock, that pleasantly surprised you?



- Right now, people would use a magic wand to help others around them behave better.

If you had a magic wand, and could change anything about life under the threat of COVID-19/Coronavirus, EXCEPT getting rid of the virus itself, what would it be?



A vaccine to cure someone infected with the disease

That people would listen and stay home for the 15 days for things other than work and groceries and medical

Decrease the panic.  
Calm people down.

Find a cure, make people realize that this is not a joke and that those that say it is will be the ones getting sick and spreading it

People work together to help each other through these challenges and stop being greedy

Have an easy way to determine if you have it. So you can quarantine yourself.

Forcing people to shelter in place and stop behaving like selfish idiots

Provide all the medical equipment and vaccine needed to provide a fast recovery from the virus and safety of everyone affected.

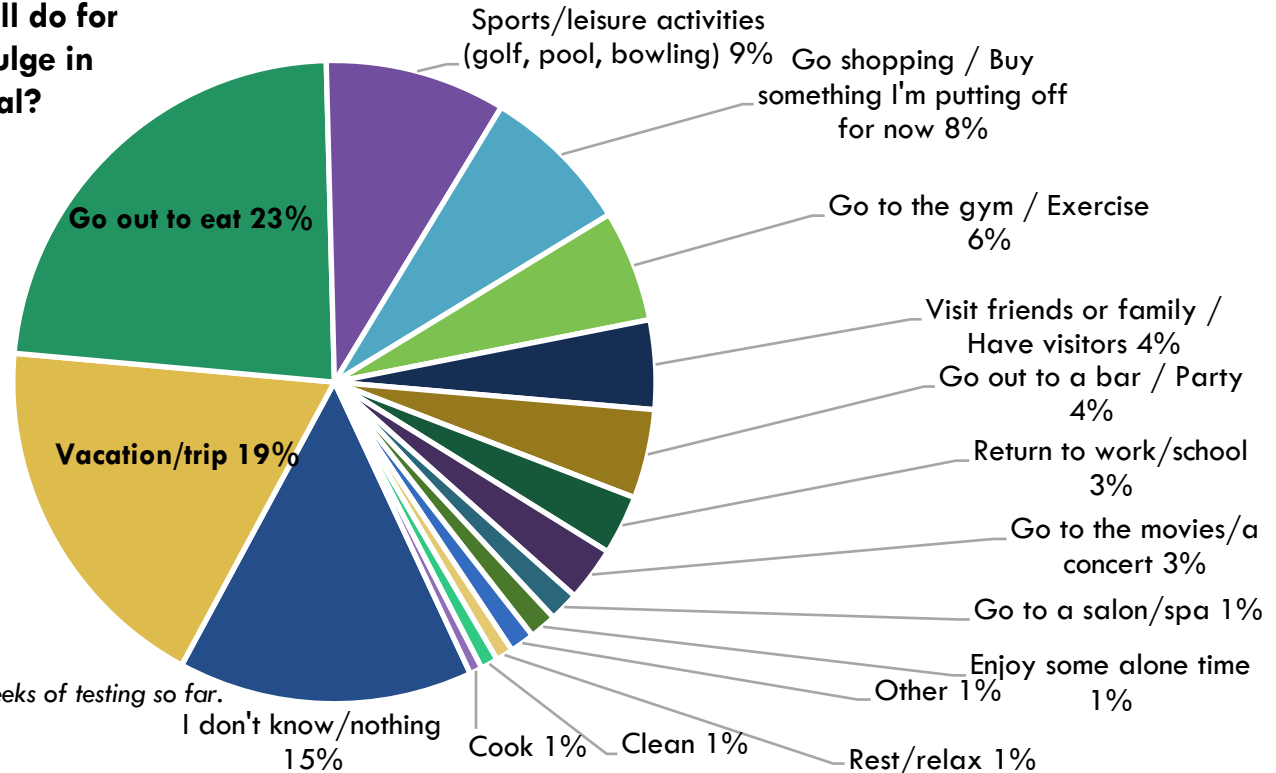
I just want my 75 year old father with diabetes to be safe and protected – that's all I want

Private enclosed booths at restaurants that you could go out to eat and not worry about viruses.

*(Just a selection of items we hope will inspire – not quantified – contact us for full verbatim list)  
Answers basically identical across two weeks of testing so far.*

- After the crisis, consumers are most looking forward to getting out and participating in the activities they can't do now, which suggests the potential for a rebound for the most distressed sectors of the economy when this is over.

**What's the first activity you'll do for yourself, splurge on, or indulge in when things return to normal?**



Answers basically identical across two weeks of testing so far.

# What products or services would help you get through the changes you've experienced due to recent events?

## Themes

Financial help

Better-stocked stores

Hand sanitizer!

Grocery Delivery

Cleaning supplies

In-home entertainment

## Select Verbatims

**“Making sure we have enough appropriate food and the vitamins we need”**

**“Being able to tell what is in stock at grocery before going to the store”**

**“Time to meditate and stay centered”**

**“Helping to get better information out to everyone about COVID-19”**

**“Anything to get my mind off things like video games or movies or intimate things for me and my fiancé”**

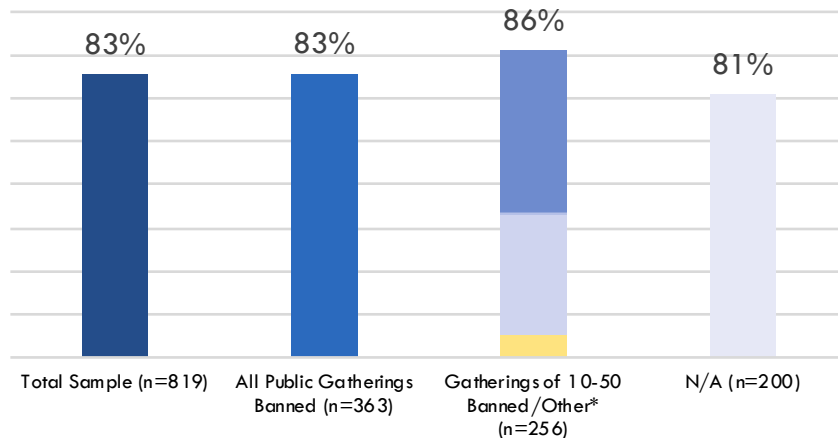
*(Just a selection of items we hope will inspire – not quantified – contact us for full verbatim list.)*

*Answers basically identical across two weeks of testing so far.*



- **Social distancing appears to be going pretty well, but not everyone is adhering to it.**
- **17% of those who live in states where all gatherings have been banned say they are not practicing social distancing – we don't know at this stage if their occupation or living situation doesn't allow them to do so, or if they just don't feel it's necessary.**

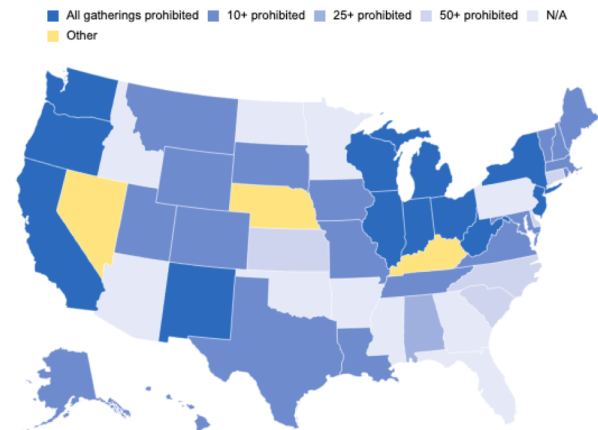
### Are you practicing social distancing?



Differences of 8% are generally at the 90% confidence level.

\*Nevada, Nebraska, and Kentucky appear to have bans similar to surrounding states.

### Large Gatherings Ban



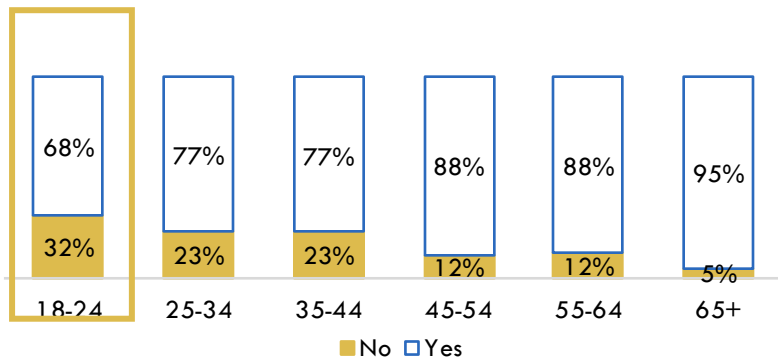
Source: Kaiser Family Foundation

Kamran Rahman/POLITICO

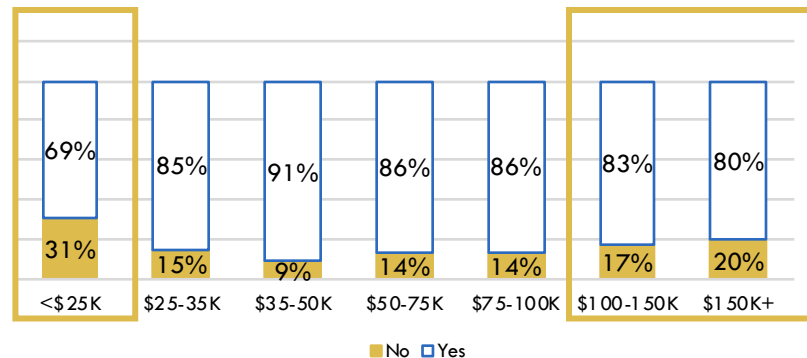
## Who's social distancing ... and who's NOT?

We imagine that a number of socioeconomic factors, work environments, and living situations may make social distancing very difficult for many in these groups.

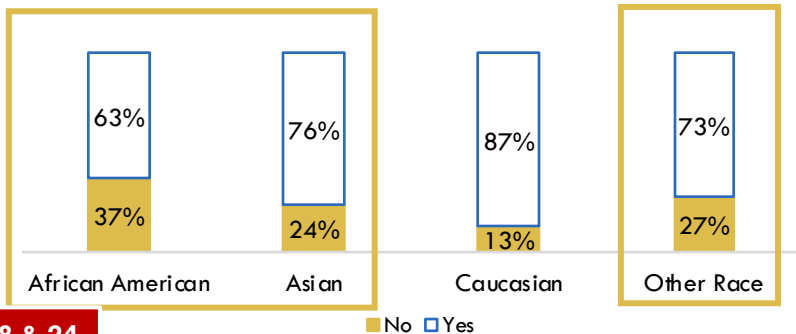
### Younger People



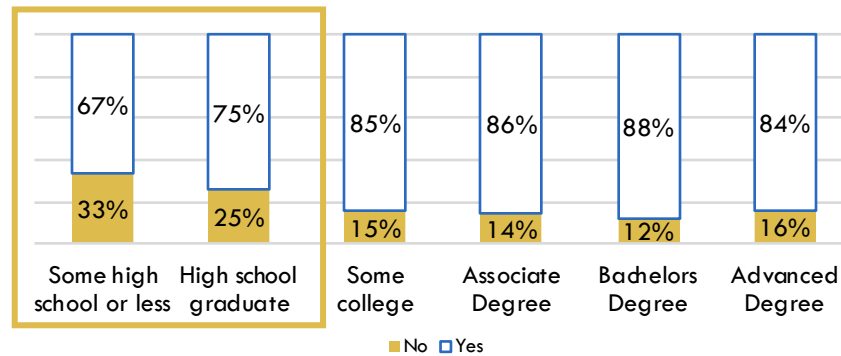
### Those With The Lowest (or Highest) Incomes



### Minorities



### Less Educated



- **What's Next?**

- These results may vary further by regional hot spot, age, household income, and countless segment opportunities.
- **Stay tuned for further updates.**
- **If you have questions about what's happening in your brand or category, ask us!**



**Contact us so we can help you navigate these new waters.**

**George Brown**

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HEALTH, SAFETY,  
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