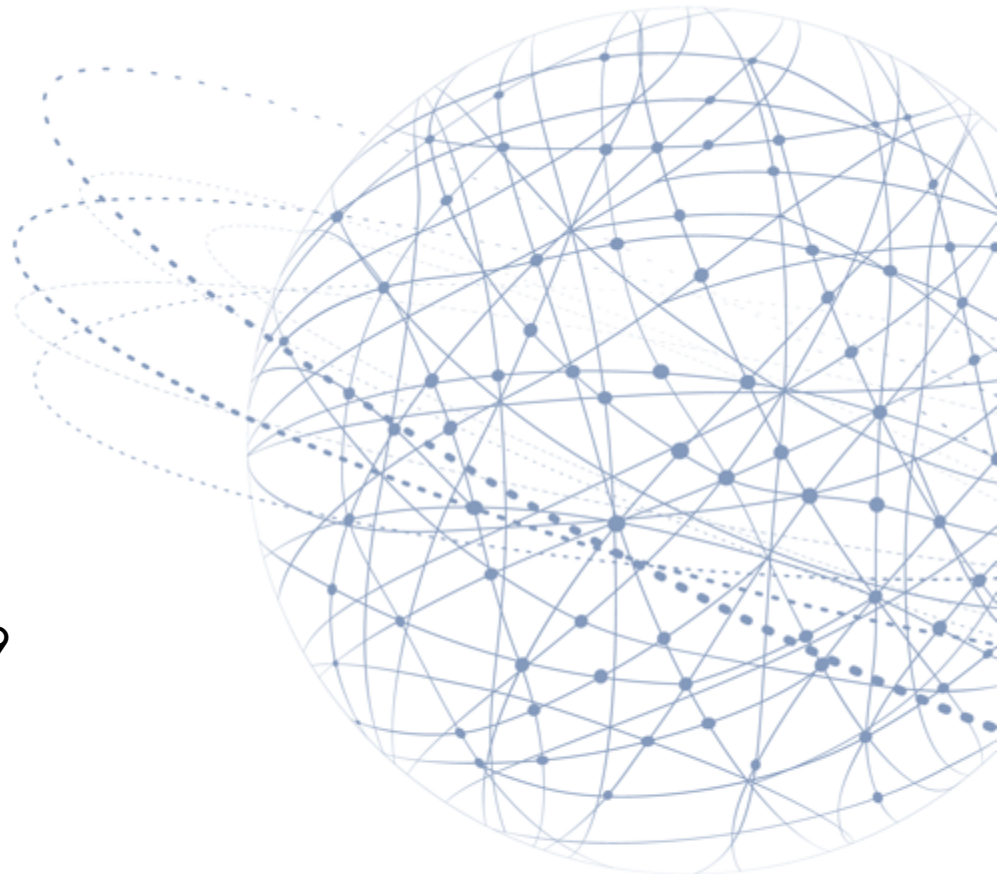




## U.S. Consumer Attitudes about COVID-19

March 18 & 24, 2020



## OBJECTIVES

- ④ 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.
- ④ Because the situation is rapidly evolving, we captured data over the course of 2 nights approximately one week apart; we will continue to update this learning periodically going forward.

## FIELD DATES

- ④ Conducted via Internet: March 18 and March 24, 2020

## SAMPLE SELECTION

- ④ March 18: n=803 Rep U.S. Males and Females age 18+
- ④ March 24: n=819 Rep U.S. Males and Females age 18+



# What's the impact on consumer emotions?

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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.





## 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?

	Total Sample	Parents	HH Income decreased
	n= 1622	488	417
	Sig.Diff.† 3%	5%	6%
My health/well-being	57%	48%	56%
Saving money	49%	48%	56%
Taking good care of my family	49%	62%	50%
Reducing stress	32%	33%	35%
Feeling more secure	25%	25%	25%
Products that leave me feeling satisfied	20%	15%	19%
Feeling more in control	18%	16%	16%
Feeling good about myself	16%	14%	12%
Saving time	17%	17%	17%
Buying from companies that are consistent with my values	8%	9%	7%
Buying from companies that understand me and my needs	6%	7%	4%
Making a good impression on others	3%	5%	3%

† Sig. Diff. – The minimum difference between ratings required to be considered statistically significant.

Blue: significantly higher than Total Sample

Red: significantly lower

- Health/well-being, saving money, and taking care of their families continue to be at the top of consumers' minds.
- Parents are also putting their personal health/well-being behind that of others in their family.
- Saving time – usually a major motivator – has fallen by the wayside for the time-being.
- Reducing stress is more of a priority than feeling secure, suggesting people are impacted more by multiple stress points than by fear at this point.
- So far, we have not seen any changes week by week, but we will continue to monitor.

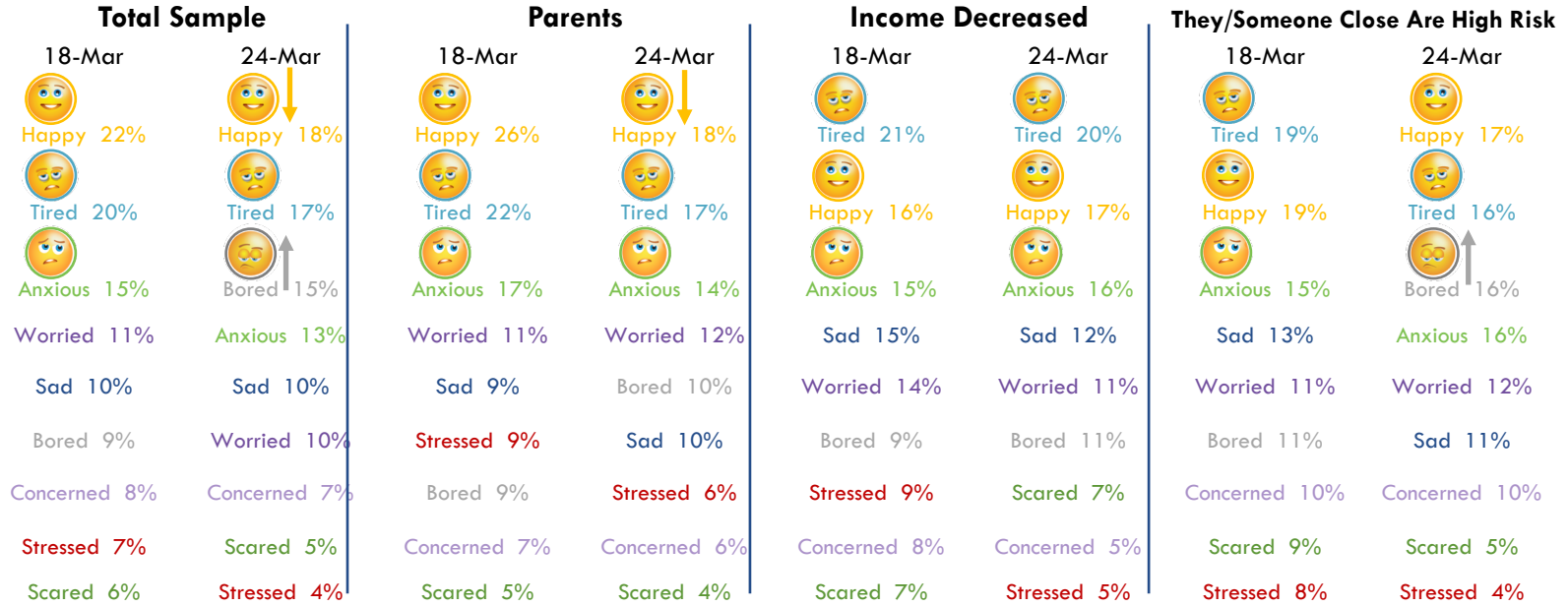




- Consumers in general are most likely to say they're **happy** right now, as many people try to stay positive and get on with their lives; but they're also **tired**, **anxious**, **worried**, **sad**, and **bored**, especially if their livelihood or health are at risk, and levels of **happiness** may be dropping.

- With increased social distancing, **boredom** is on the rise. We certainly hope folks are heeding warnings and staying home, and that this remains the worst outcome for many. How will they feel in the future, and importantly, **how can you help them cope?**

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



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

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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?





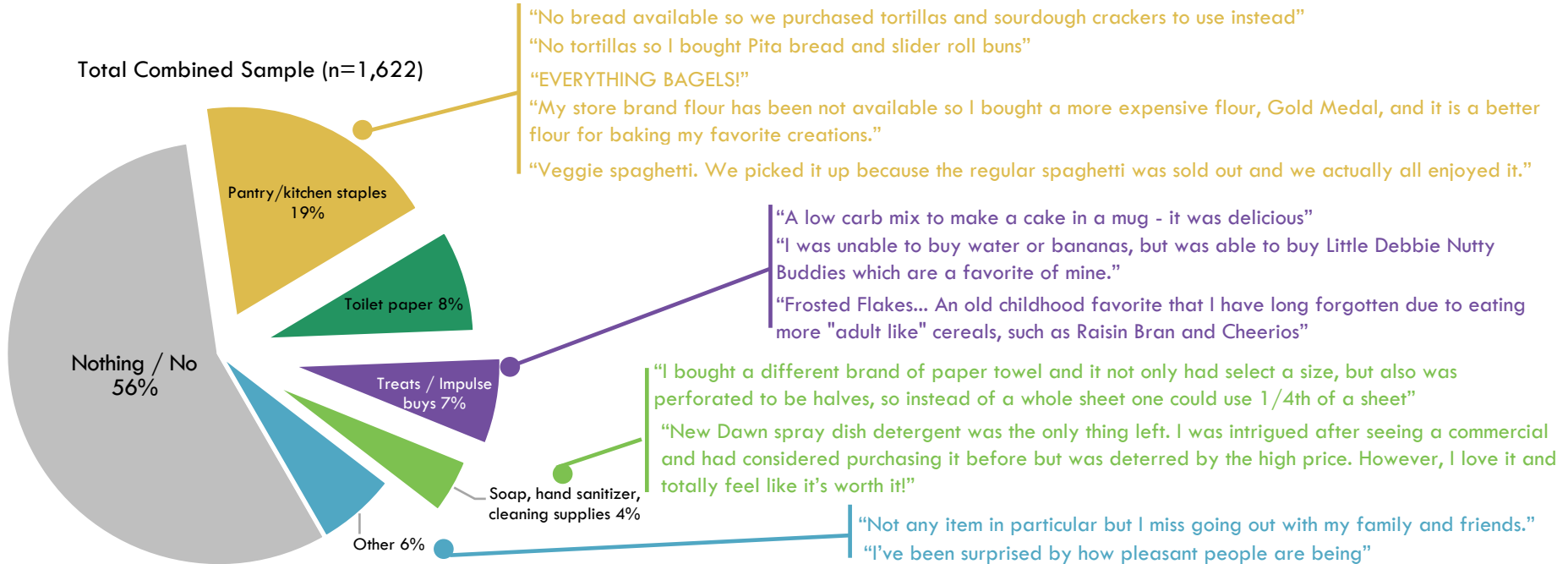
**How do you think advertisers should change their commercials due to what's going on, if at all?**

	March 18 (n=803)	March 24 (n=819)
<b>Yes - should change (net)</b>	<b>52%</b>	<b>52%</b>
Acknowledge what's going on	7%	9%
Be compassionate/reassuring / Encourage kindness	9%	5%
Stop advertising activities that can't happen now (restaurants, vacations)	8%	6%
Address/acknowledge supply issues / Discourage hoarding	7%	4%
Yes (non-specific)	2%	7%
Help people who are struggling financially	4%	5%
Tell us how you're helping protect my health and well-being	4%	4%
Help make staying home easier (Delivery, ways to stay occupied)	3%	4%
Provide some much-needed cheer and warmth	3%	3%
Encourage social distancing/good hygiene	1%	4%
Help spread awareness about how to prevent the spread of the virus	4%	1%
<b>Nothing/No (Keep things as normal as possible)</b>	<b>32%</b>	<b>36%</b>
<b>I don't know</b>	<b>13%</b>	<b>12%</b>

- **Half of consumers continue to want to see advertisers change due to the current crisis.**
- They would like Brands to acknowledge the crisis, lead the charge in providing reassurance and promoting kind or rational behavior, and/or pivot to stop promoting things that aren't accessible/appropriate at this time.
- **Yet, others wouldn't recommend any changes happen at all.**
- Some verbatim responses suggest they're tired of hearing about COVID-19, or just think it's not an issue advertisers need to worry about.
- **We suspect these responses are highly likely to differ by category!**

- 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.

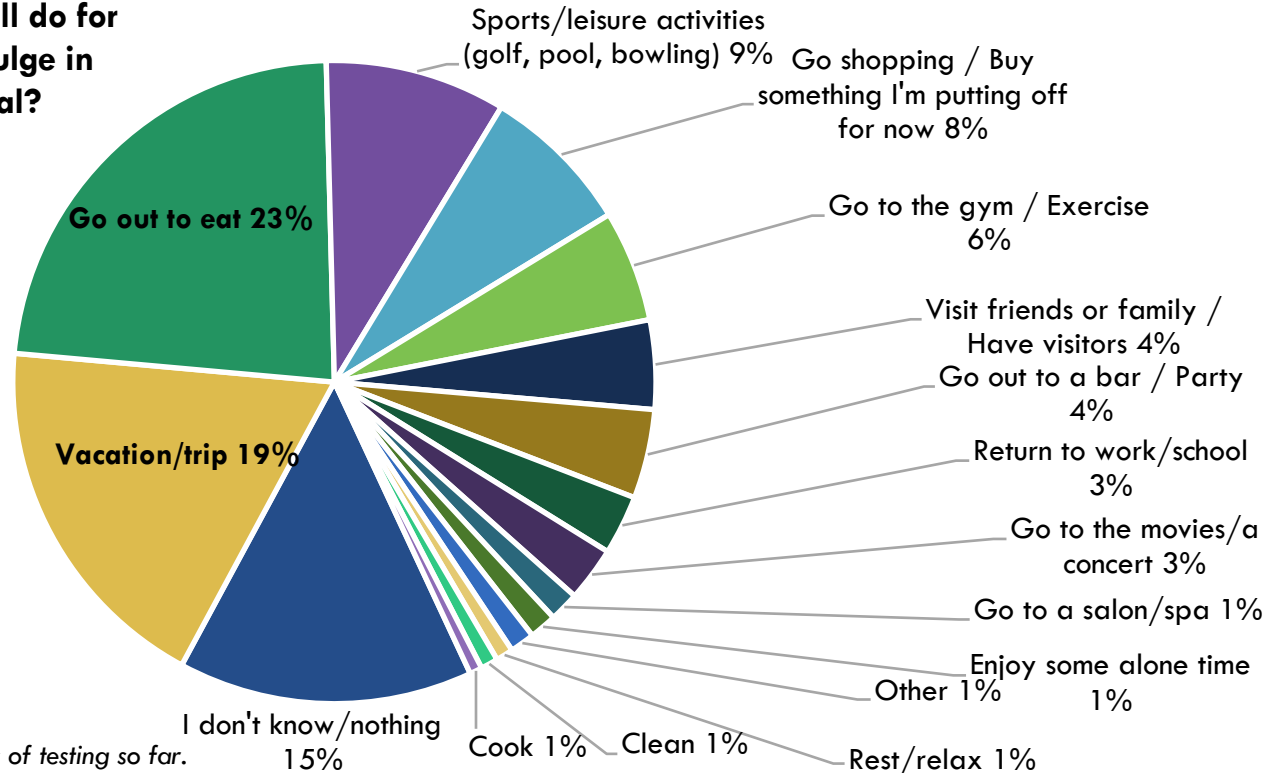
Many people have recently experienced their favorite items being out of stock. What, if anything, have you bought recently to make up for something being out of stock, that pleasantly surprised you?





- 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.*



# How are economic changes influencing consumers?

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Unemployment numbers never tell the whole story.





- As of March 24<sup>th</sup>, 28% of consumers have experienced job loss due to COVID-19 (40% if reduced hours are included), and 54% have had their working conditions changed in some way.
- The increase week-over-week in the number of people working from home is the biggest driver of change.

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

	March 18	March 24	
	n= 803	819	
	Sig.Diff.† 4%	4%	
<b>Employment affected net (not including hours cut)</b>	<b>48%</b>	<b>54%</b>	
<b>Employment stopped/reduced net</b>	<b>27%</b>	<b>28%</b>	
An employer has closed	20%	20%	Net: 39%
A household member has been laid off	15%	17%	
A household member has had their hours cut (3/24 only)		27%	
<b>Working from home net</b>	<b>35%</b>	<b>40%</b>	+5% pts.
An employer has started ALLOWING you/your family member(s) to work from home	29%	35%	
An employer has started REQUIRING you/your family member(s) to work from home	24%	30%	

† Sig. Diff. – The minimum difference between ratings that is generally required to be considered statistically significant.

Blue: significantly higher than March 18



- 69% 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 31% 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 probably home from school as well.
- Those in the High Risk Category are less likely to have lost work – probably because many are already retired, while those who are Not High Risk are the ones with higher job loss.

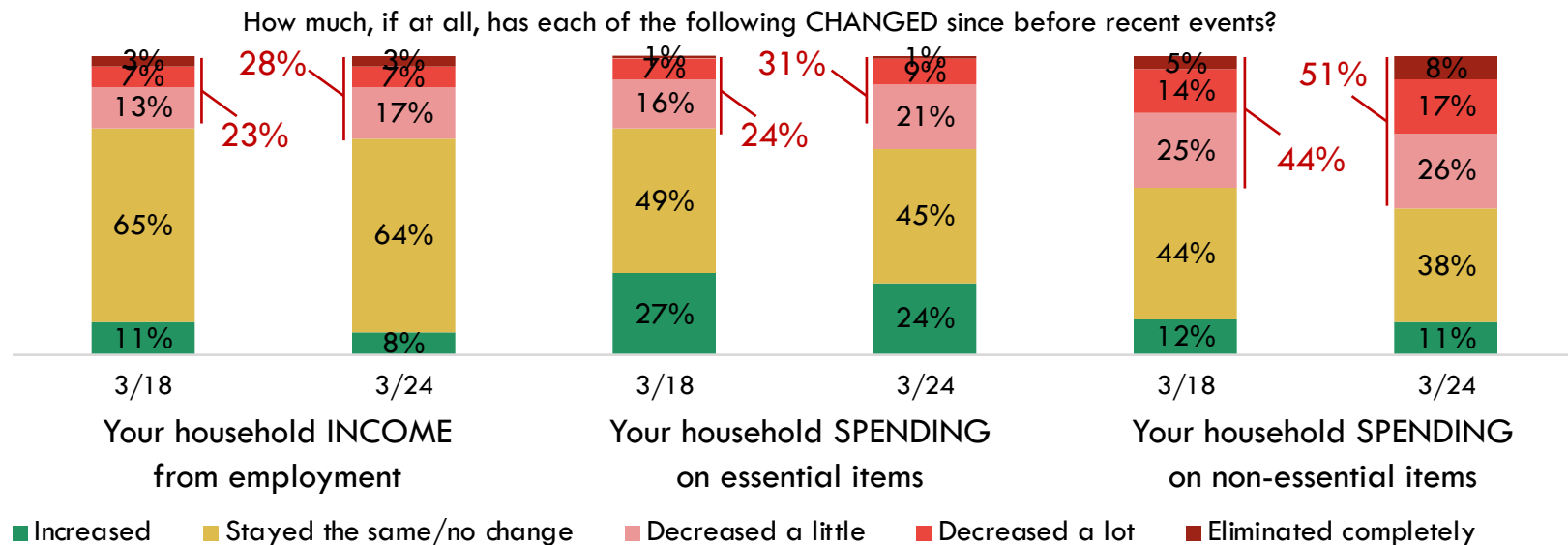
Which of the following changes have you or someone in your household experienced due to recent events?			HH Income	HH Income not	High Risk	Not High Risk
	March 24	Parents	decreased	decreased		
	n= 819	239	226	593	88	731
	Sig.Diff.† 4%	8%	8%	5%	12%	4%
<b>Employment affected net</b>	<b>59%</b>	<b>71%</b>	<b>78%</b>	<b>52%</b>	<b>53%</b>	<b>64%</b>
<b>Employment stopped/reduced net</b>	<b>39%</b>	<b>50%</b>	<b>69%</b>	<b>28%</b>	<b>38%</b>	<b>40%</b>
<b>Employment stopped net</b>	<b>28%</b>	<b>33%</b>	<b>50%</b>	<b>19%</b>	<b>27%</b>	<b>29%</b>
An employer has closed	20%	23%	38%	13%	17%	22%
A household member has been laid off	17%	21%	31%	11%	17%	16%
A household member has had their hours cut	27%	37%	51%	18%	27%	27%
<b>Working from home net</b>	<b>40%</b>	<b>49%</b>	<b>38%</b>	<b>41%</b>	<b>34%</b>	<b>45%</b>
An employer has started ALLOWING you/your family member(s) to work from home	35%	44%	33%	35%	28%	40%
An employer has started REQUIRING you/your family member(s) to work from home	30%	38%	32%	30%	26%	34%

Blue: significantly higher than Total Sample

Red: significantly lower



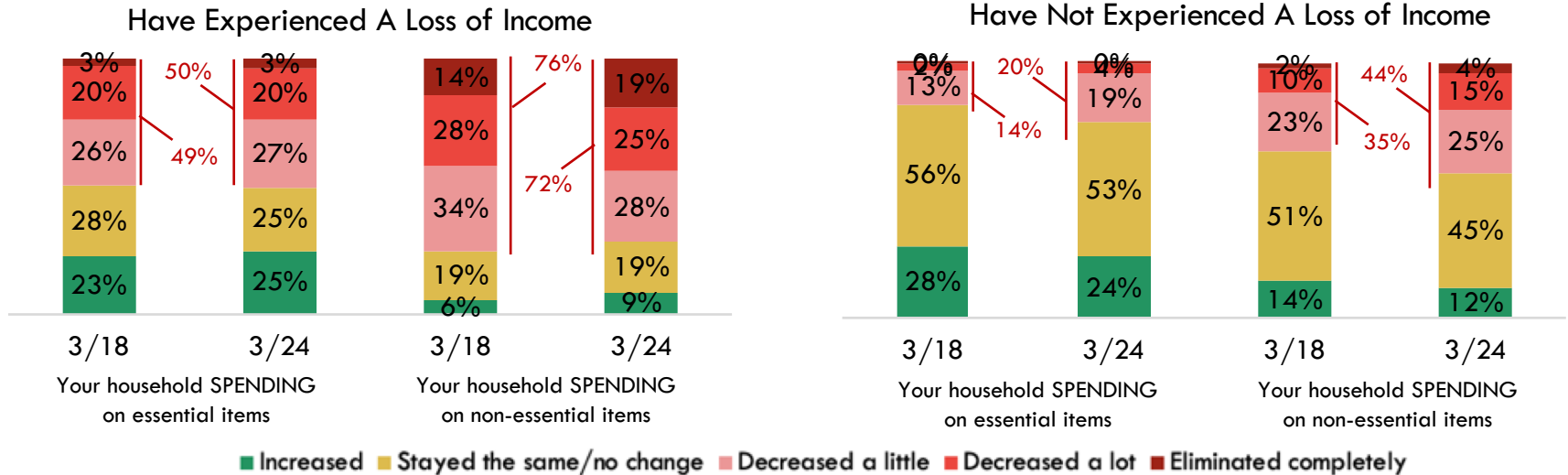
- **Already 28% of the total population have experienced at least some income loss – an increase from 23% last week – and approximately half have already decreased their non-essential spending.**
- 31% have even decreased what they consider to be “essential” spending.





- 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.
  - The complete elimination of non-essential spending may be on the rise among this group, going from 14% to 19% in one week.
- Those without a loss of income have so far generally not been reducing their spending as much, but they may be showing the beginnings of a trend of lower spending overall.
  - Of course, it's too early to tell how the Federal recovery package will influence these results, before or after receipt.

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



# How have behaviors/lives changed?

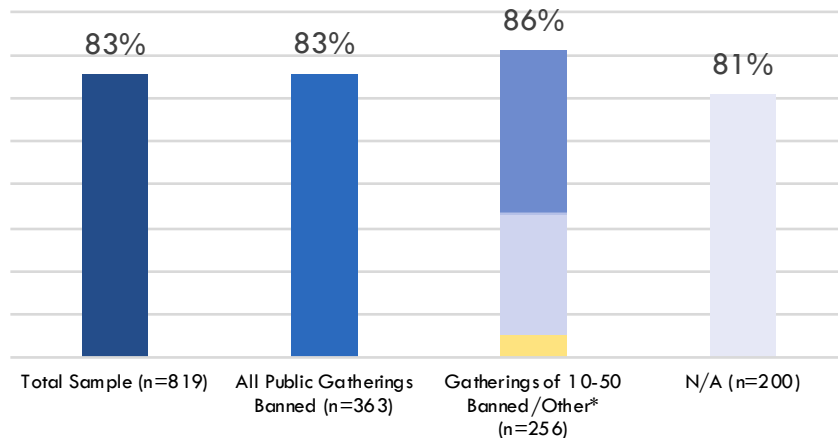
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Finally, what are the behavior changes we're not seeing on the nightly news?



- **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?

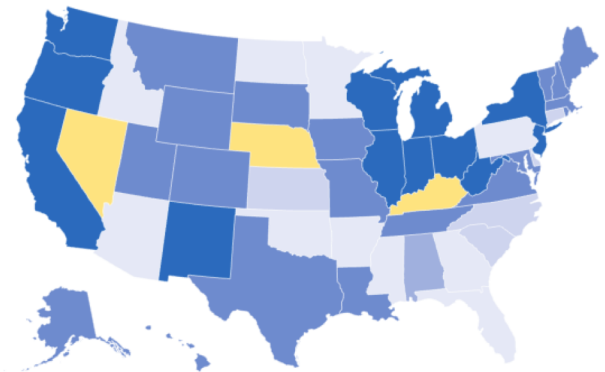


Differences of 8% are generally at the 90% confidence level.

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

### Large Gatherings Ban

■ All gatherings prohibited ■ 10+ prohibited ■ 25+ prohibited ■ 50+ prohibited ■ N/A  
■ Other



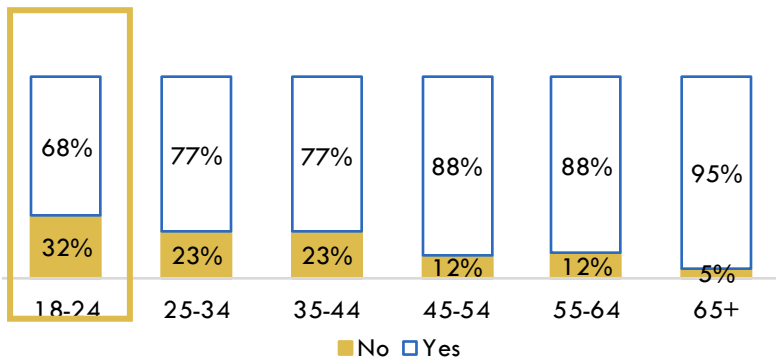
Source: Kaiser Family Foundation

Kamran Rahman/POLITICO

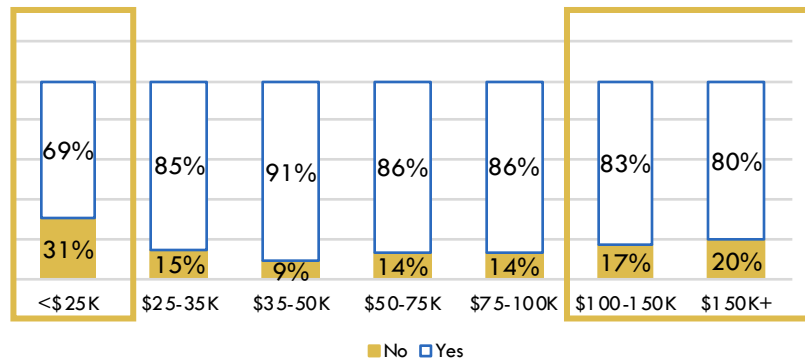
## Who's social distancing ... and who's NOT?

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

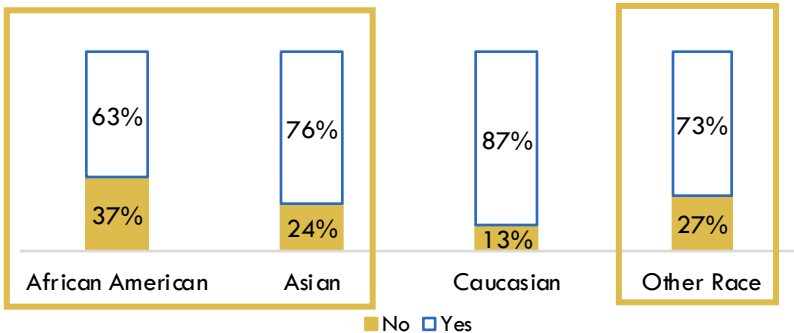
### Younger People



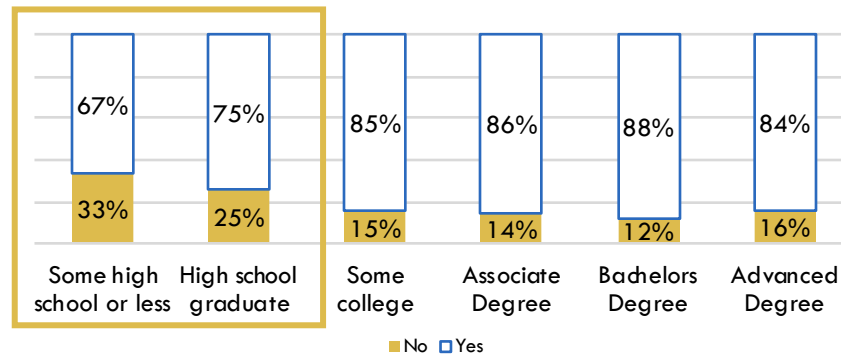
### Those With The Lowest (or Highest) Incomes



### Minorities



### Less Educated





## 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%	<b>50%</b>
Watching new shows or movies	42%	45%	47%
Exercising or walking	34%	34%	36%
Cooking	35%	<b>41%</b>	<b>42%</b>
Eating comfort foods	30%	31%	31%
Watching old familiar shows or movies	31%	33%	33%
Using social media to connect with people	28%	<b>35%</b>	<b>35%</b>
Using social media to get information	30%	<b>38%</b>	<b>36%</b>
Snacking	30%	35%	34%
Playing games	28%	<b>37%</b>	34%
More one-one time within the family	26%	<b>41%</b>	<b>37%</b>
Doing things to care for your mental well-being	22%	22%	<b>29%</b>
Hobbies	21%	25%	25%
Spiritual reflection/prayer/meditation	18%	20%	<b>25%</b>
Trying new recipes	17%	21%	19%
Arts and Crafts	12%	17%	15%
Teaching my kids	9%	<b>27%</b>	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



- **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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