ACUPOLL®

Transcend the Status Quo™

Daily Life with the Coronavirus

Coping Strategies, Safety Measures, and Back-to-School

August & September 2020

ACUPULSE™

OBJECTIVES

- As the COVID-19 pandemic continues, 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.
- This wave digs deeper into mask-wearing, social distancing, and the decisions Americans are making to feel safe.
- We've focused on the questions and segments that were the most interesting to us, but if there's something in here you'd like us to dig into – **please ask!**

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

Download previous waves here:

https://www.acupoll.com/blog/category/COVID-19+Data+Reports

FIELD DATES & SAMPLE SIZES (Margin of error 3% @ 90% confidence)

Report #	Field Date	n=	Topic Highlights
1	March 18 March 24	803 819	New behaviors, impact of product shortages, expectations from advertisers
2	March 31 April 1	803 808	Shifting priorities, unsung heroes, plans for the future, positives from the crisis
3	April 8 April 14 April 16	982 970 825	Changes in behavior, expectations from retailers and business in general, investigation of what "going back to normal" means
4	April 23 April 30 May 1	900 800 865	More details on "going back to normal," guidance for retailers and restaurants to promote feelings of safety, attitudes about lockdowns
5	May 7 May 8 May 13 May 15 May 18	959 971 904 982 938	Continued exploration of attitudes toward lockdowns and masks, willingness to return to old activities, focus on eating, snacking, and weight
6	June 5 June 12	858 876	Consumer behavior in terms of re-opening the economy, attitudinal evaluation expanded to include racial protests, what worries are at the top of the list, how advertisers should handle controversial topics, focus on e-commerce (e-commerce: *Jan 26, March 26, May 14, n=970+ each*)
7	July 20 July 30	908 981	Cognitive biases and psychological drivers underlying consumer behaviors, including wearing a mask in public, buying certain categories, and interest in a COVID-19 vaccine
8	August 13 August 31 Sept 14	975 869 299 Parents	Insights into day-to-day safety measures, coping strategies, and what going back to school means for parents

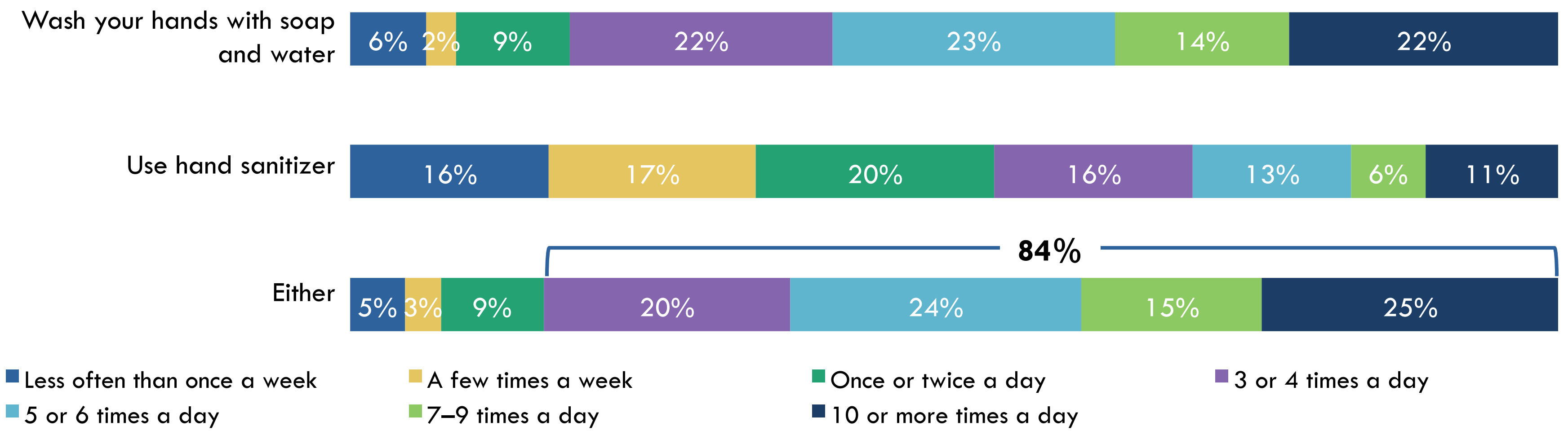
*Key tracking questions captured in every wave: demographics, emotions, core motivations, economic impact, lifestyle and employment changes

- While the vast majority of respondents are washing/sanitizing their hands frequently and wearing masks, quite a few are not:
  - 16% wash/sanitize 1–2x/day or less … even though ¾ of them leave the house and interact with others regularly
  - Most wear a mask when going into businesses, but 8% refuse
  - 13% wear their mask *beneath their noses* … or even lower
  - 8–12% don't take precautions (distancing, staying outside, masks) when dining, shopping, or interacting with others
- The eagerness to promptly take a vaccine once approved is declining
- Most parents were given the choice on schooling: 40% of all parents chose in-school learning for their child, while 75% chose remote (and some have a combination)
  - Parents have many concerns with schooling: academic, health (child, teacher, spread to family), difficulty wearing masks and distancing, social/loneliness issues, etc.
- Respondents aren't just resorting to Netflix and Food Network to cope; while some have turned to prayer or exercise and healthy food, others have increased their junk food and/or alcohol consumption
- Consumers' overall product priorities – before COVID is even mentioned in the survey – continue to show heightened focus on *Saving Money*; yet, *Health* and *Family* have slipped, and there's increased emphasis on comfort (*Satisfying Yourself*, *Feeling Good About Yourself*)
- We continue to see about one-third with lost income (near the peak); recent employment changes are slight, and confidence is low their jobs will return; and, perhaps as a result, more people are decreasing non-essential spending

Safety Measures

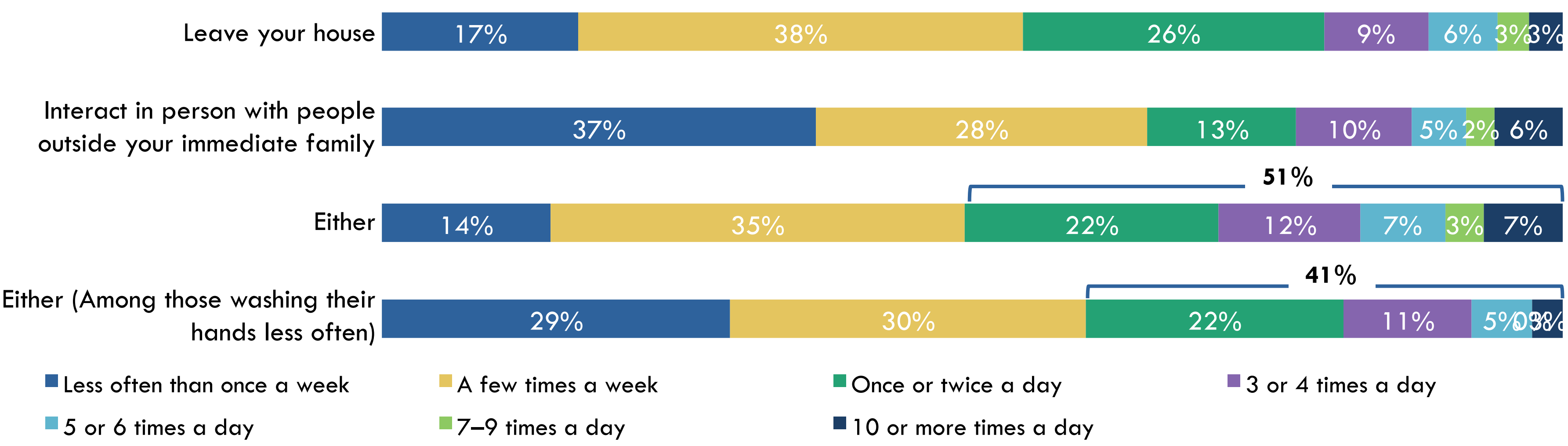
- **84% of consumers report they're either washing or sanitizing their hands at least several times a day.**
  - It's a little alarming that 16% aren't washing their hands more often than once or twice a day.

On an average day, since the coronavirus pandemic began, about how often do you do each of the following?



- **51% of those contacted are interacting with the outside world on a daily basis.**
  - That leaves half of the population fairly isolated (with 14% not even leaving the house or interacting with people on a weekly basis).
  - And those who are washing their hands less often are leaving the house less often – we'll hope that they are just going for walks around the neighborhood, and not working in food service.

On an average day, since the coronavirus pandemic began, about how often do you do each of the following?



- Overall willingness to wear a mask is about the same as it was in May, but those in favor of masks are digging their heels in more, with a significantly higher percentage now saying they won't visit a business that doesn't enforce mask wearing.

Thinking about businesses that require the use of a face mask to enter, which of the following best describes you?

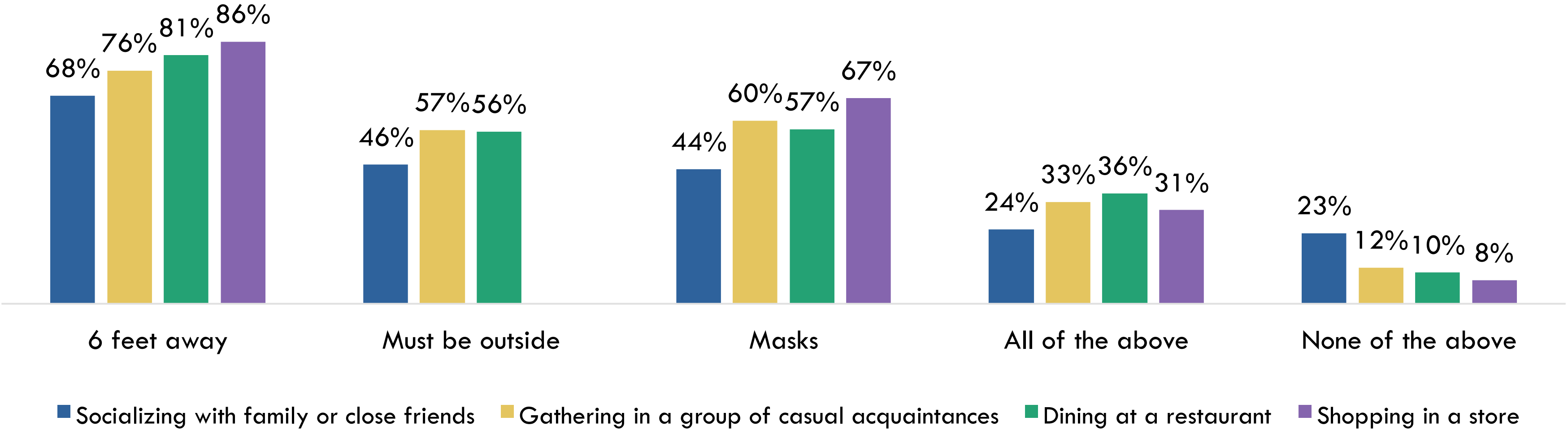
May 15, 2020

August 13 & 31, 2020

- While 92% of consumers are willing to wear a mask, fewer are wearing them properly/ effectively, with 13% of the sample freely acknowledging they wear it either under their nose or essentially not covering their face at all.

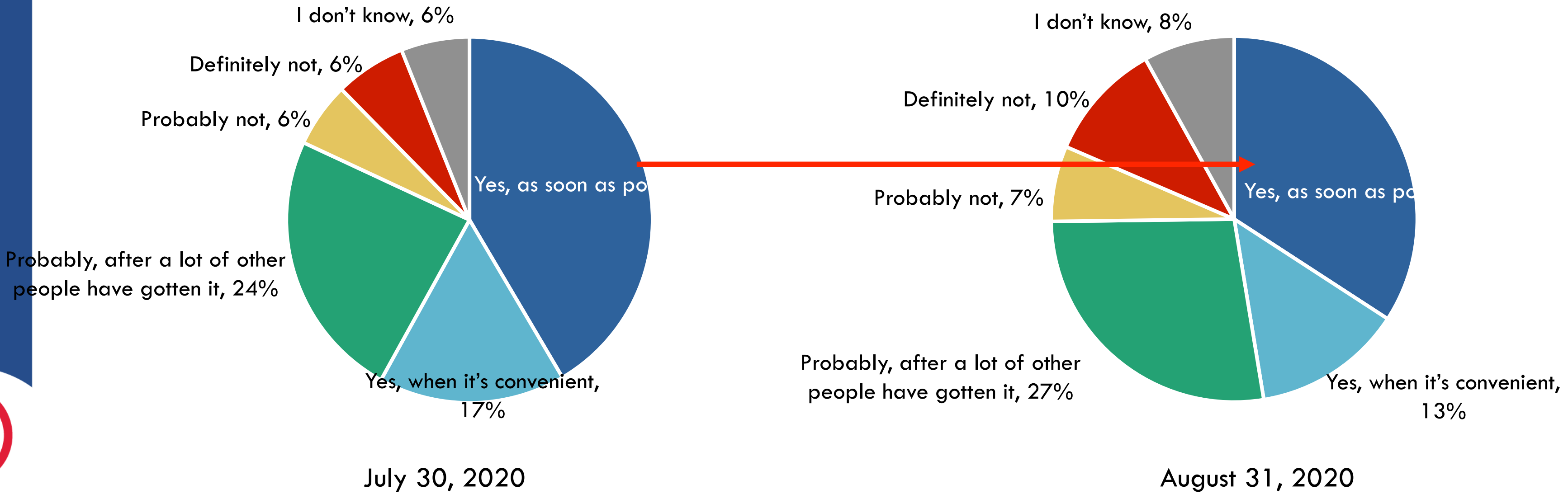
- While most agree that wearing a mask is something they want themselves and others to do, maintaining 6 feet of distance is more likely to be the minimum that will keep them feeling safe.
- And, there are definitely different standards depending on whether the gathering is comprised of close family or friends (lower), or the general public in stores (highest).

Thinking about the following activities, what is the LEAST amount of precautions you would take in order to feel safe?

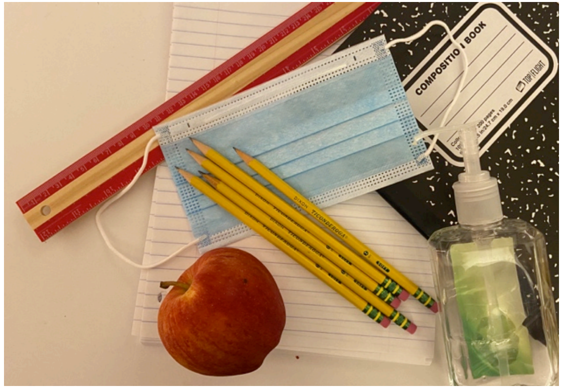


- Certainty and eagerness to get a coronavirus vaccine may be on the decline – we can think of two factors that might explain this, and there may be more:
  - Fear that the Trump administration may rush to provide a vaccine before it's ready and safe (61% of Americans are at least somewhat worried about this – https://time.com/5887777/rushed-vaccine-democrats-republicans/)
  - A recent viral claim that only 6% of coronavirus deaths were due to the virus, which, if true, would make a vaccine less necessary (https://www.livescience.com/covid-19-comorbidities.html)
- We'll keep an eye on this question in the weeks and months ahead.

If a vaccine becomes available for the coronavirus, will you get it, and if so, how soon?



Back-To-School

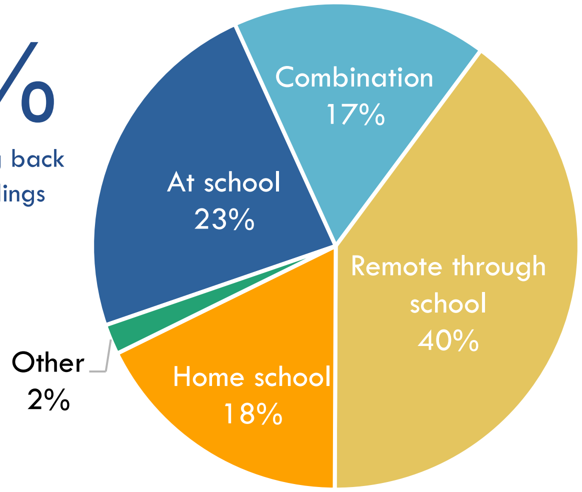


- Remote learning is the norm for back-to-school this year, with only 23% of parents reporting that their child will go back into the school building with no remote or home-school option.
- In addition to homeschooling, 17% of parents have gotten creative in seeking additional help to get their kids through the school year.

If you have school-age kids, which of the following are you planning on for the coming school year?

40%

Have kids going back to school buildings



75%

Using some type of remote/home learning

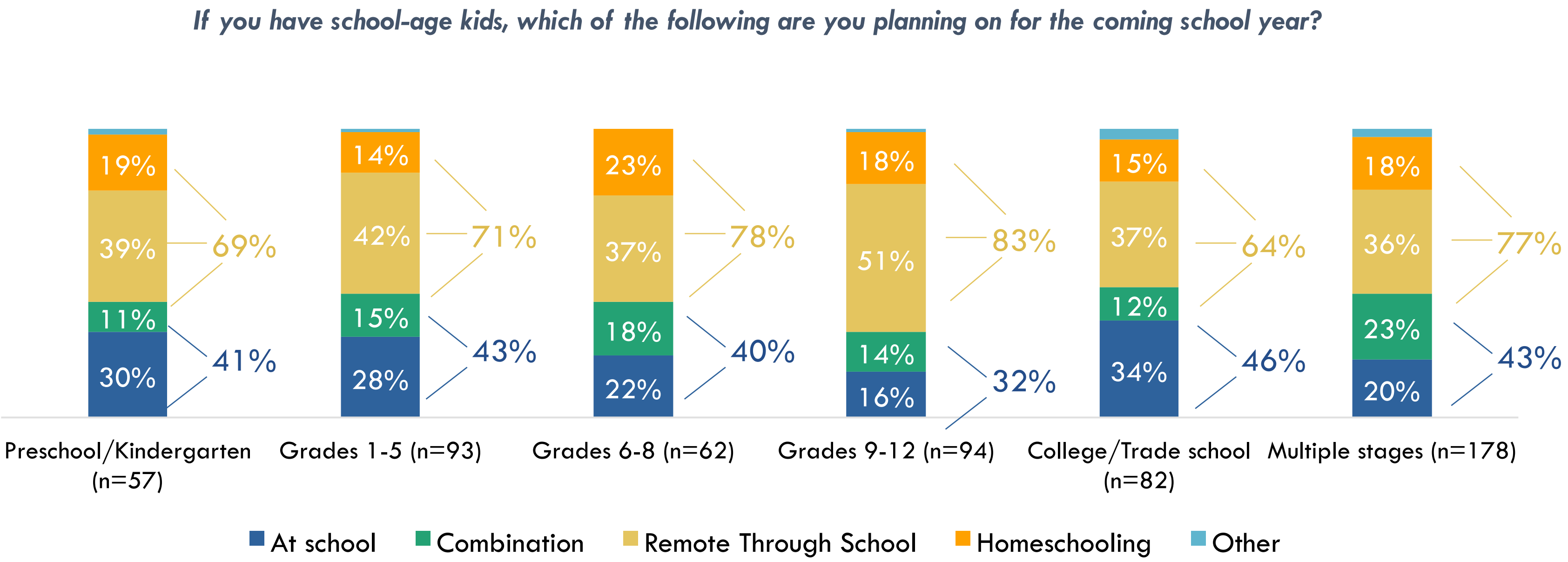
PLUS:

17%

Hiring tutors or teachers to help at home, or forming an education co-op with other parents

Among Parents of school-age kids – 8/14 and 9/14 (n=566)

- Parents of high school kids are least likely to have kids attending in-person, and college-age kids are most likely to be in-person.

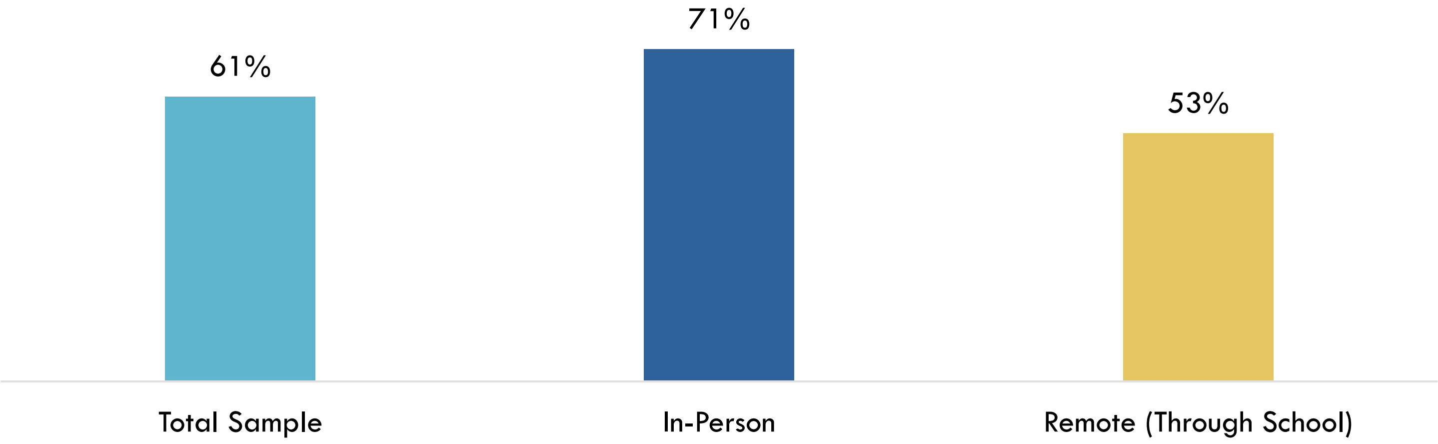


Among Parents of school-age kids – 8/14 and 9/14

- Those who have kids attending school in-person are significantly more likely to have been given a choice about whether or not to return.

Were you given a choice about your child's school this year, or is the entire district/school employing one plan for all students?

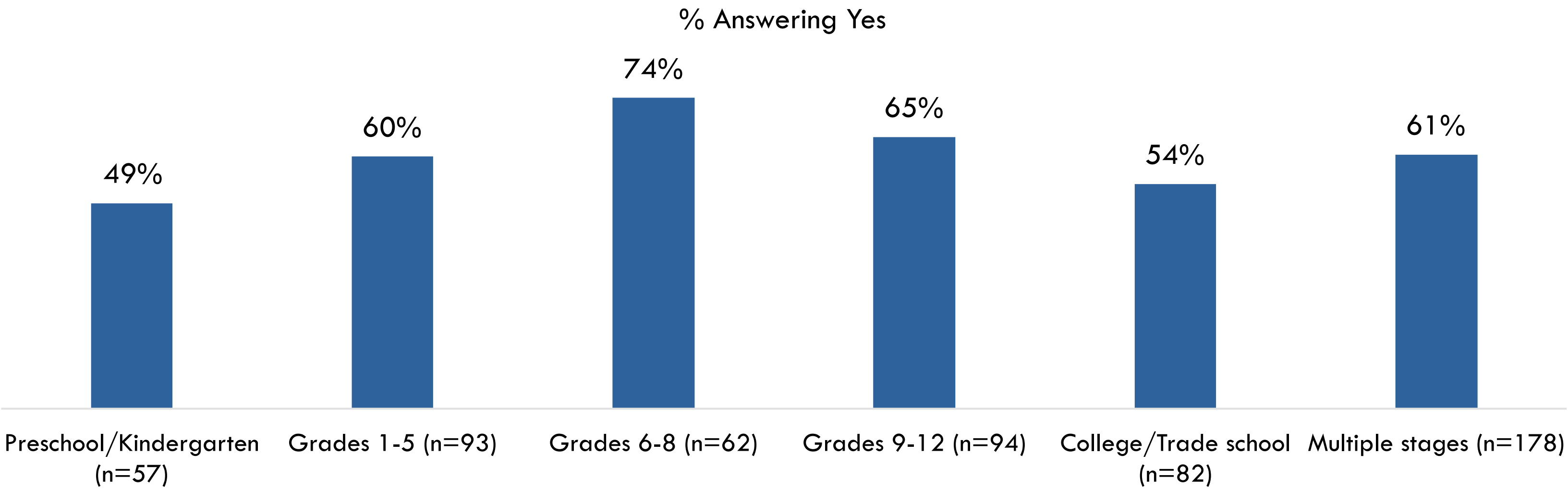
% Answering Yes



Among Parents of school-age kids – 8/14 and 9/14 (n=566, 229, 322)

- Parents of middle-school kids are most likely to have been given a choice about in-person vs. remote, while only about half of parents of preschool/kindergarten-age kids had a choice.

Were you given a choice about your child's school this year, or is the entire district/school employing one plan for all students?

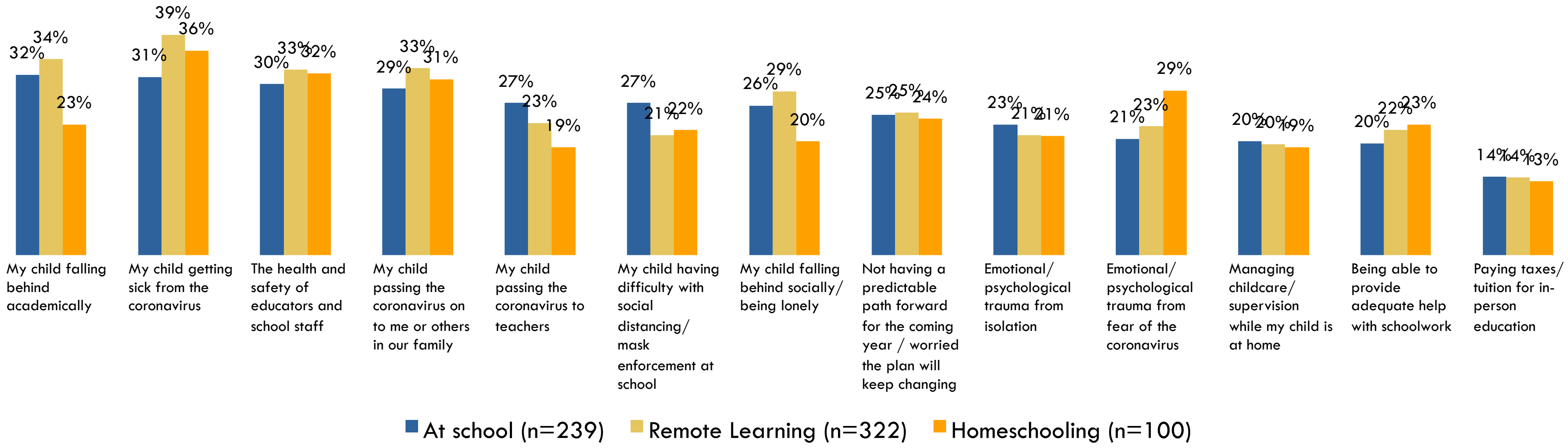


Among Parents of school-age kids – 8/14 and 9/14

Parents have a lot to be concerned about!

	With Kids In School	Remote Learning	Homeschooling
Top Concerns:	My child falling behind academically My child getting sick from the coronavirus The health and safety of school staff Child passing coronavirus on to family	My child falling behind academically My child getting sick from the coronavirus The health and safety of school staff Child passing coronavirus on to family	Emotional trauma from fear of COVID-19 My child getting sick from the coronavirus The health and safety of school staff Child passing coronavirus on to family
Differentiated Concerns:	My child passing COVID-19 to teachers Difficulty with safety/mask rules	My child falling behind socially	

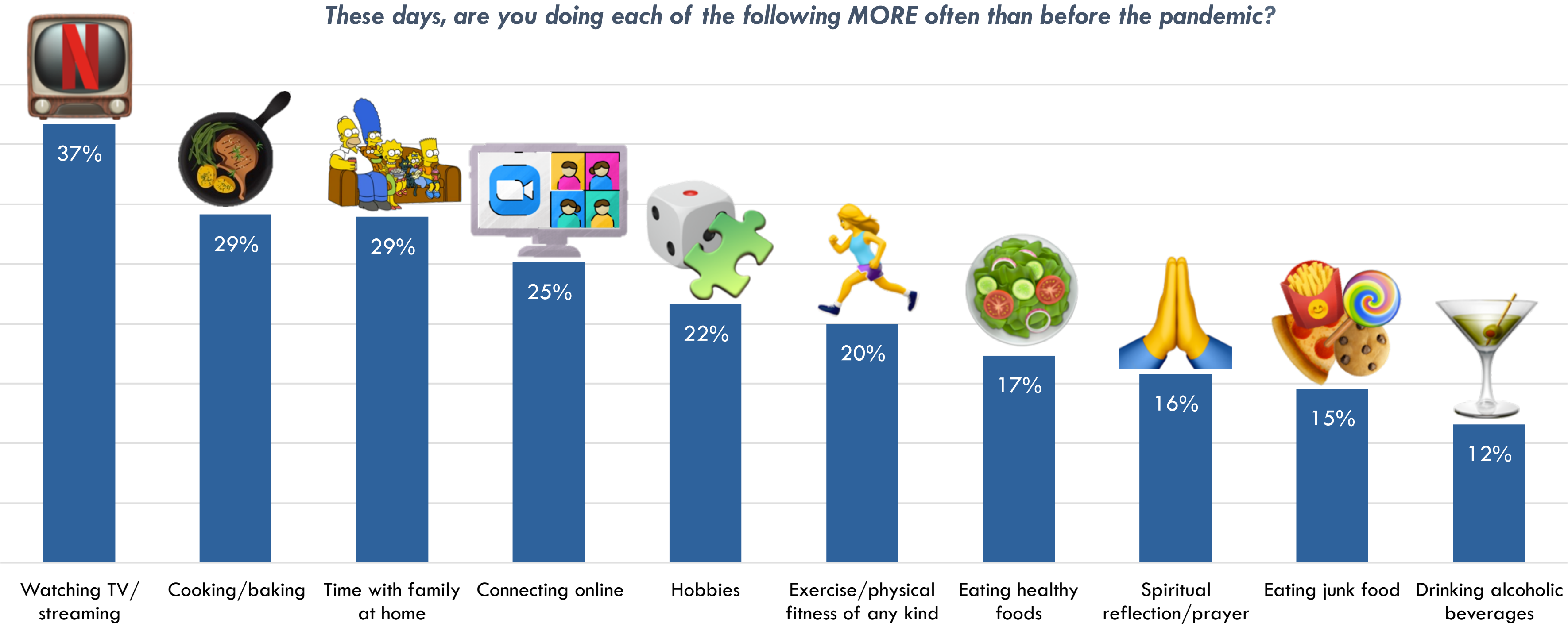
Which of the following are you concerned about when it comes to kids going back to school, or not, as the case may be?



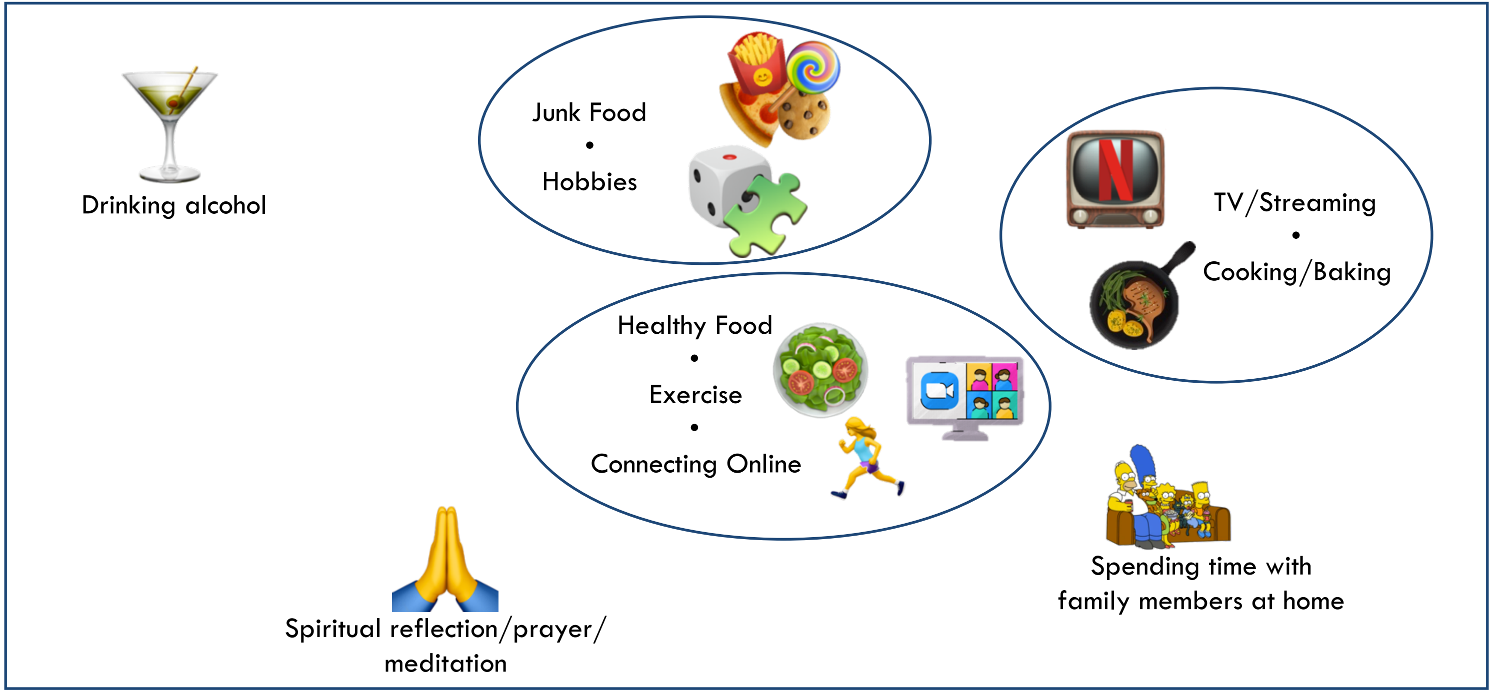
Among Parents of school-age kids – 8/14 and 9/14

Coping Strategies

- **Watching TV, cooking/baking, and spending more time with family at home are the activities that Americans are most likely to be doing more of.**
  - 64% are doing at least one activity more often than they used to, and 91% are engaging in 4 or more of these activities on a regular basis.



- *KYST* Map illustrates that there are some activities that cluster together, cited more frequently by certain groups of people.*
  - Watching TV/streaming and cooking/baking tend to be enjoyed more by the same consumers.
  - Those who are engaging in hobbies more often, are also more likely to be eating more junk food.
  - It's interesting to note that connecting with others online clusters together with eating healthy food and exercising more.



**KYST: A multidimensional scaling technique we often use for our clients to help identify which stimuli (e.g. flavors, versions, etc.) are rated similarly by groups of consumers.*

	% of Sample*	More likely:
Spending time with family members at home	29%	Married, have kids Have increased savings & essential spending
TV/Streaming • Cooking/Baking	19%	Have kids Have increased essential spending
Spiritual reflection/ prayer/ meditation	16%	Younger (62% 18–44) Live in the South
Drinking alcohol	12%	Employed full-time, higher income, more education, have school-age kids
Junk Food • Hobbies	7%	Younger (70% 18–44)
Healthy Food • Exercise • Connecting Online	6%	Younger (63% 18–44), married, employed full-time, higher income, more education, have kids under 25

*doing activity more often – If more than one listed, % of sample doing both/all more often.

ACUPOLL Precision Research

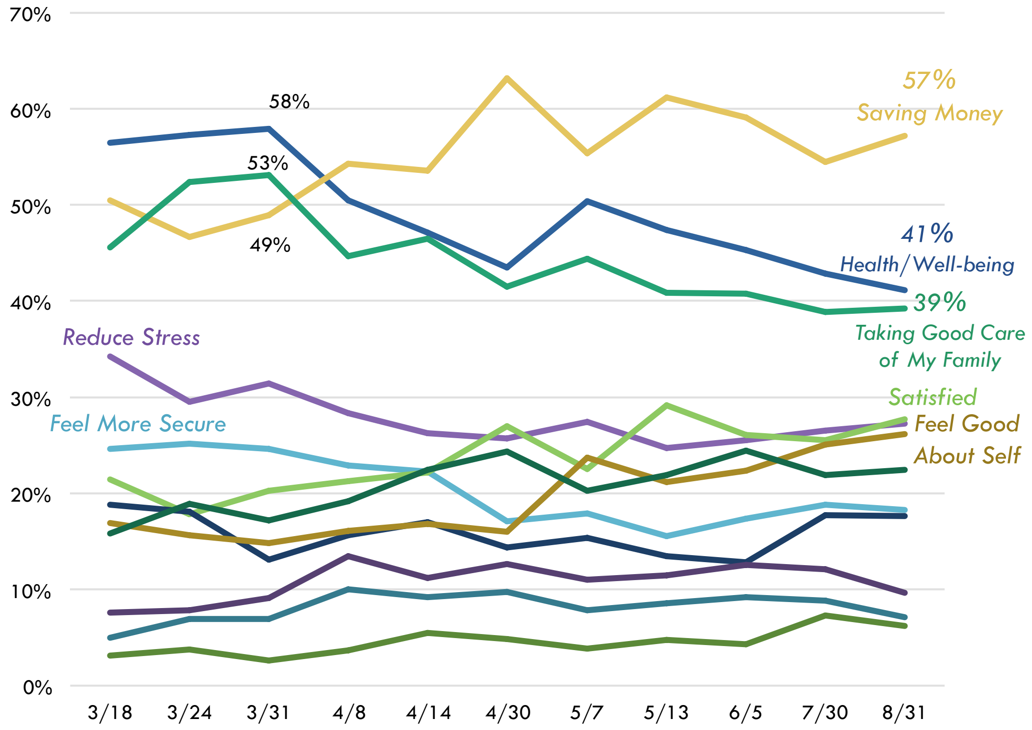
Emotional & Economic Impact

Continuing our tracking of consumer priorities and sentiment

Core Motivations

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

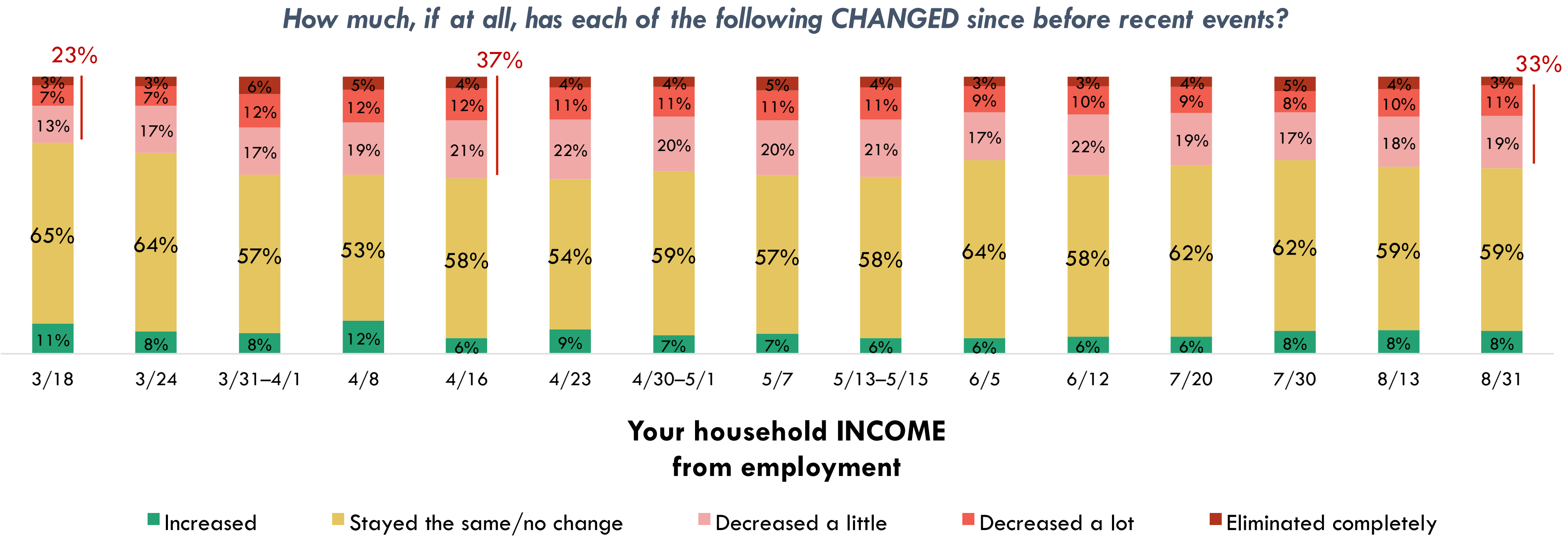
When you're looking for products to buy, what are your TOP 3 PRIORITIES right now?



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

- **We are continuing to see *Saving Money* dominate as most important when making buying decisions, while *Health/Well-being* and *Taking Good Care of My Family* decline.**
  - This reinforces the need for companies to focus on justifying their Value proposition in this environment.
- **The need to *Reduce Stress* and *Feel More Secure* have settled down into lower priorities, and consumers are beginning to demand that products *Satisfy, Save Time*, and *make them Feel Good about themselves* again.**

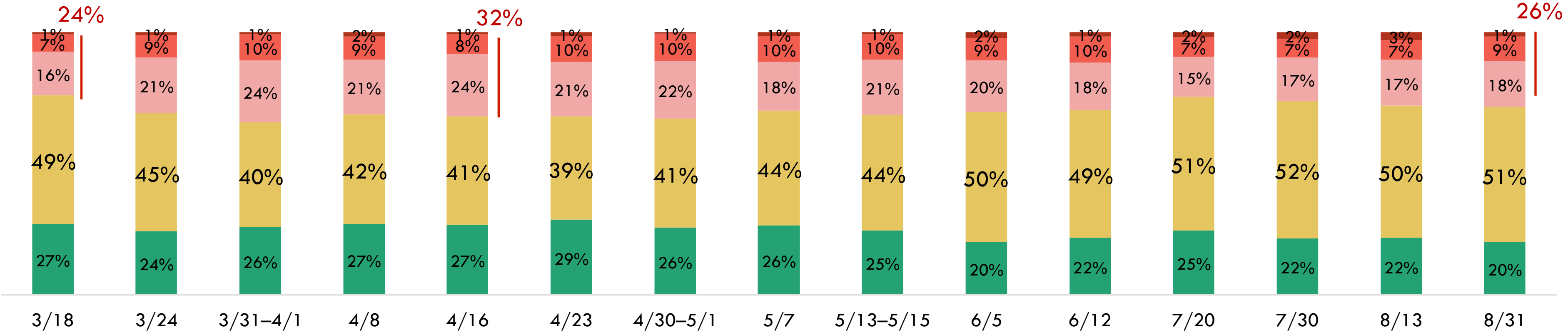
- About one-third of those surveyed have lost at least some income – a number that has held steady since early April, although a few % points off its peak of 37%.



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

- The % of households decreasing their essential spending is also down from its mid-April peak of 32%.
- Those *increasing* their household spending has been declining since the mid-April peak of 29%.

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



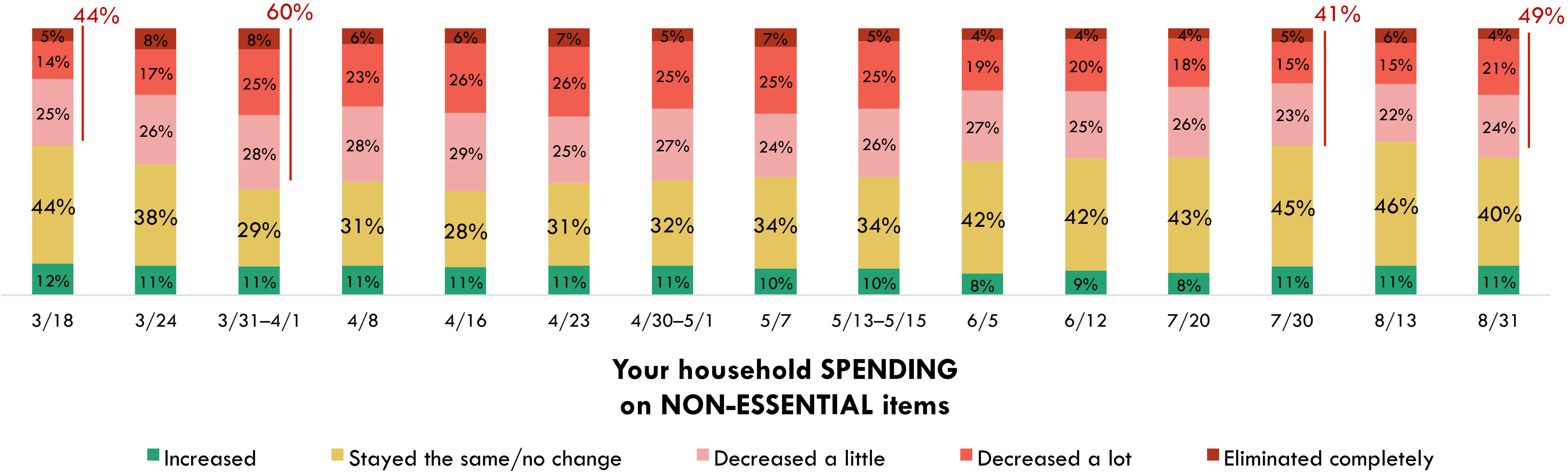
	3/18	3/24	3/31–4/1	4/8	4/16	4/23	4/30–5/1	5/7	5/13–5/15	6/5	6/12	7/20	7/30	8/13	8/31
Eliminated completely	1%	1%	1%	2%	1%	1%	1%	1%	1%	2%	1%	2%	2%	3%	1%
Decreased a lot	7%	9%	10%	9%	8%	10%	10%	10%	10%	9%	10%	7%	7%	7%	9%
Decreased a little	16%	21%	24%	21%	24%	21%	22%	18%	21%	20%	18%	15%	17%	17%	18%
Stayed the same/no change	49%	45%	40%	42%	41%	39%	41%	44%	44%	50%	49%	51%	52%	50%	51%
Increased	27%	24%	26%	27%	27%	29%	26%	26%	25%	20%	22%	25%	22%	22%	20%

Your household SPENDING on ESSENTIAL items

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

- In this most recent wave, we're seeing an increase in those who are spending less on non-essential items.
  - This could have to do with the decreased income noted a couple slides back, or the expiration of Federal unemployment benefits and uncertainty over return – or maybe just that summer is over, and they're spending less on fun activities.

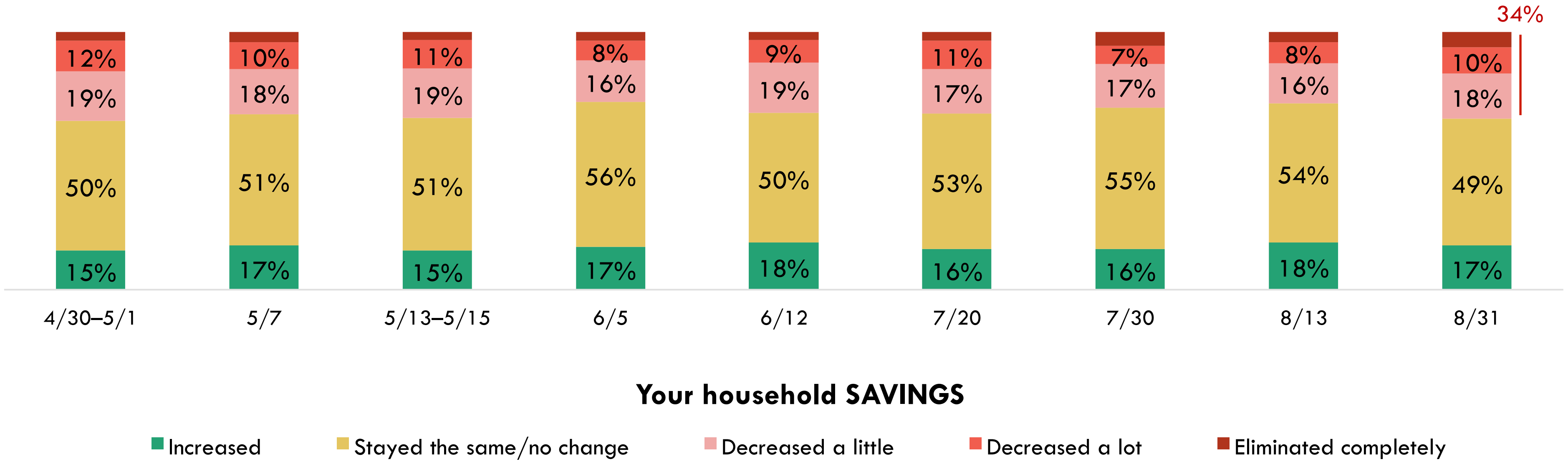
How much, if at all, has each of the following CHANGED since before recent events?



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

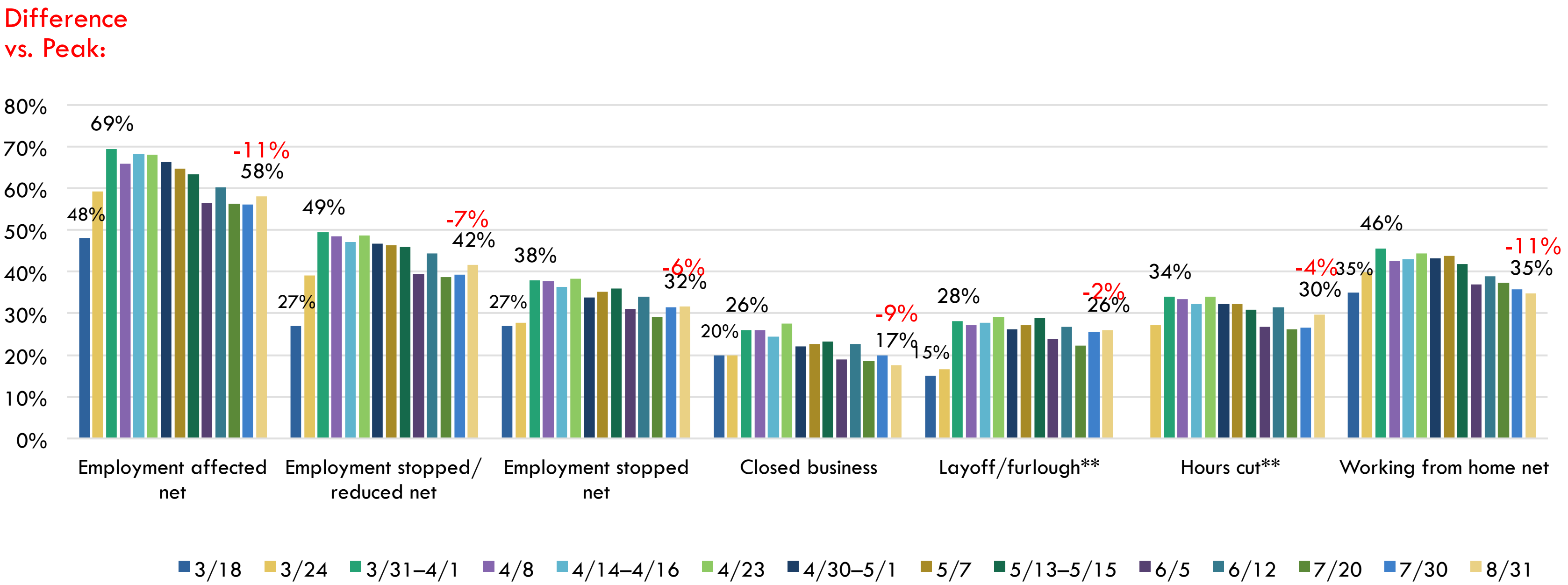
- About one-third of households have had to pull from savings, which is at the high end of the range we've seen.

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



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

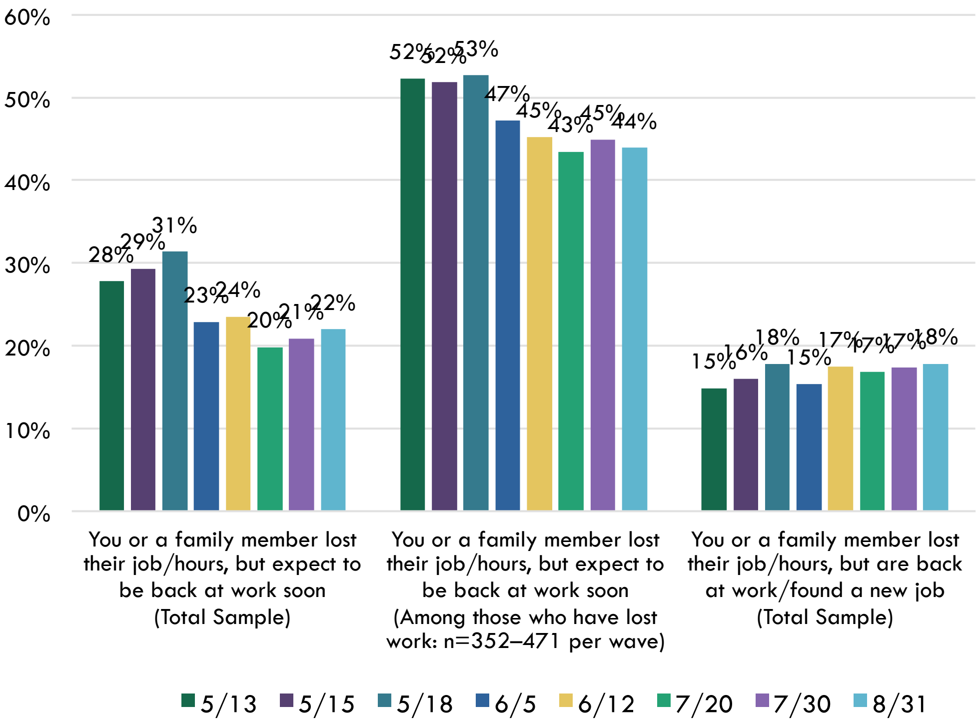
- **Employment losses may be trending down from their peak at the beginning of April, as some businesses re-open or people find new jobs.**
  - However, the changes in recent waves are slight, and those with stopped/reduced income are still at an alarmingly high rate if these businesses/industries don't bounce back soon.



***Furlough* added on 3/31 ***Hours cut* added on 3/24

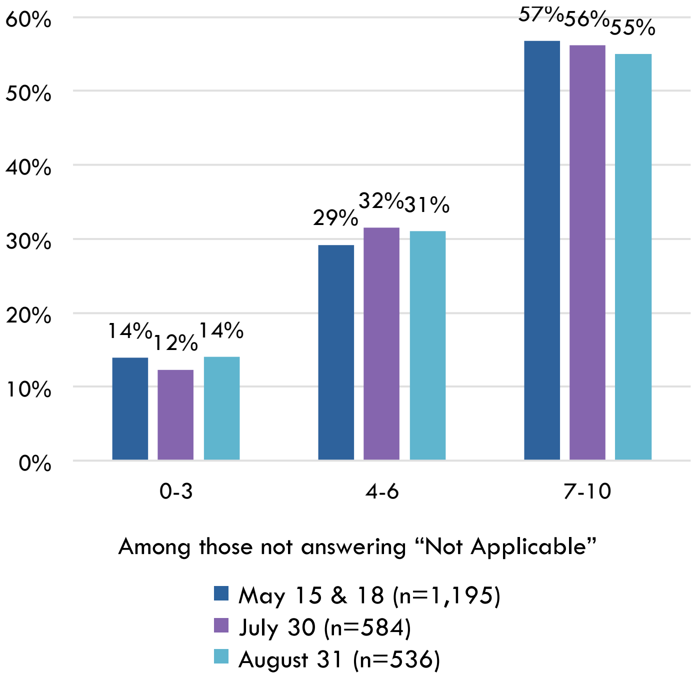
Differences of 4% or greater are significant at the 90% confidence level.

- While some unemployed workers are optimistic that they'll be back at work soon, and some have already been able to find new work, about half have low confidence in getting their jobs back – and that level of confidence is sinking.



If you have lost income or employment due to the Coronavirus, how CONFIDENT are you that you will get your hours/salary back sometime in the near future?

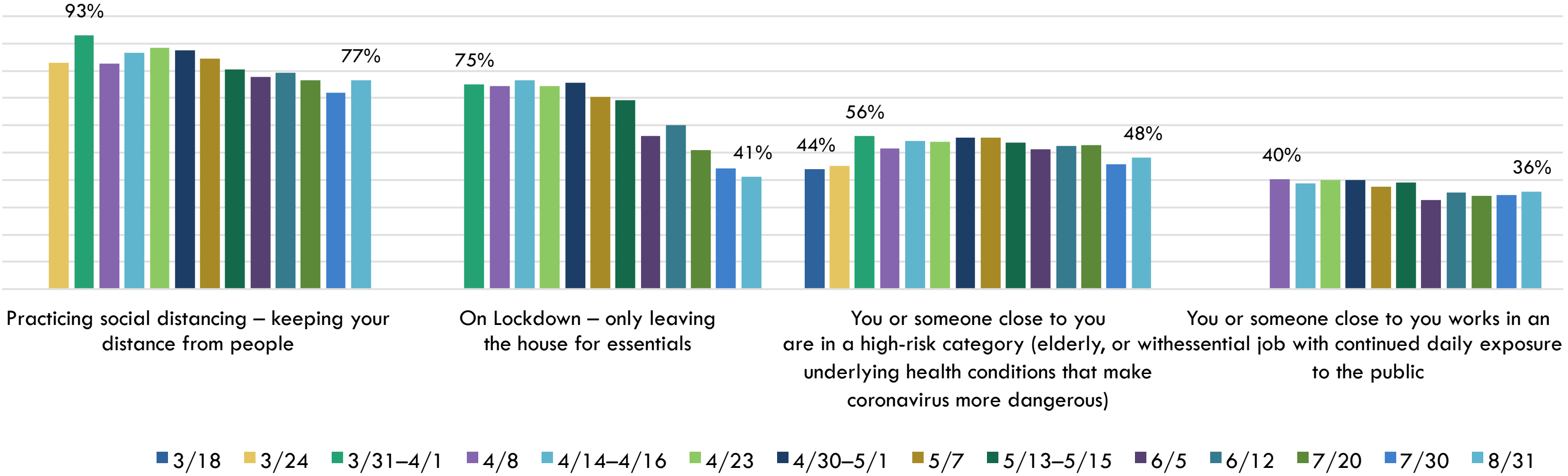
(0) Not At All Confident / (10) Very Confident



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

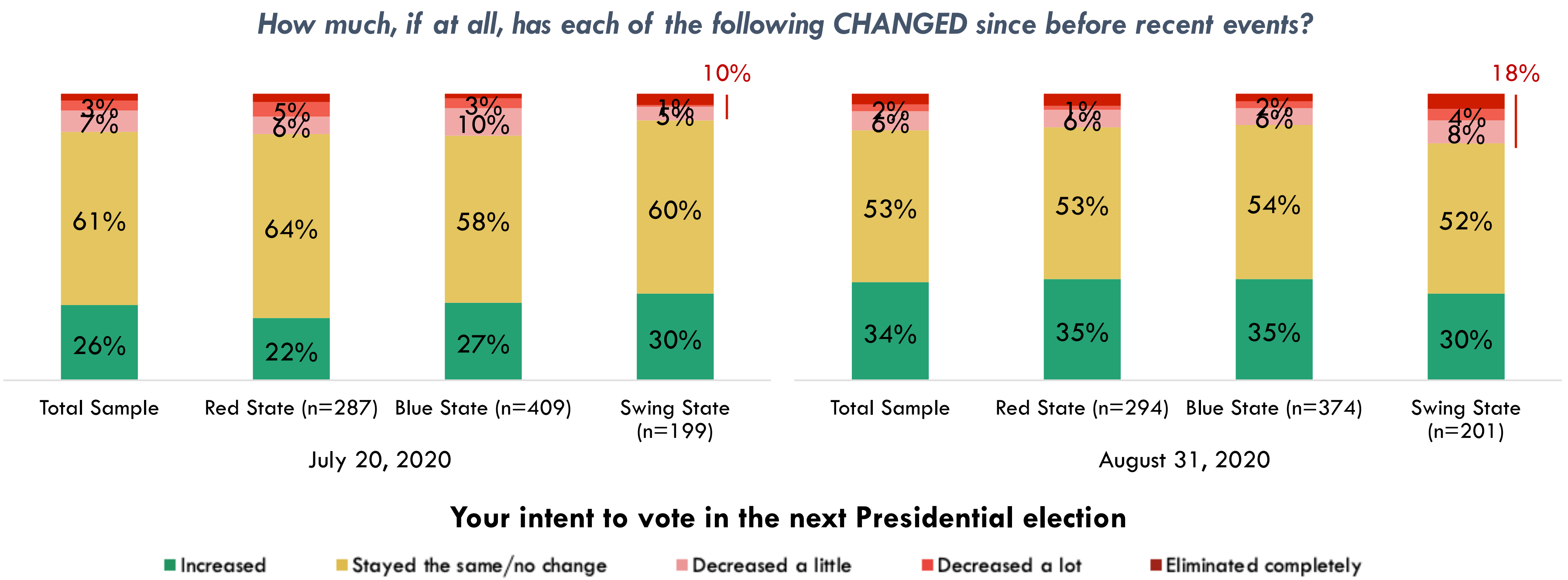
- The number of consumers practicing social distancing is up again slightly, but lockdown continues to decline.
- The number of people working in essential jobs has decreased, perhaps due to additional recent layoffs/closures, changes in worksites that decrease public contact, or people willingly changing jobs in favor of something with less public exposure.

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



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

- Intent to vote in the next presidential election is getting stronger as election day approaches, although not in swing states.
  - In fact, in swing states, 18% report they're less likely to vote now, compared to only 10% in July.



Red states: Carried by Republicans in the last 4 Presidential elections; Blue: Democrats; Swing: Combination

- **What's Next?**
  - These results may vary further by regional hot spot, age, household income, and countless segment opportunities.
  - If you have questions about what's happening in your brand or category, ask us!
  - Missed our previous reports? Click here: https://www.acupoll.com/blog/category/COVID-19+Data+Reports
  - Want to share with friends or colleagues? Please feel free! **https://mailchi.mp/acupoll.com/covid-19-data**

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

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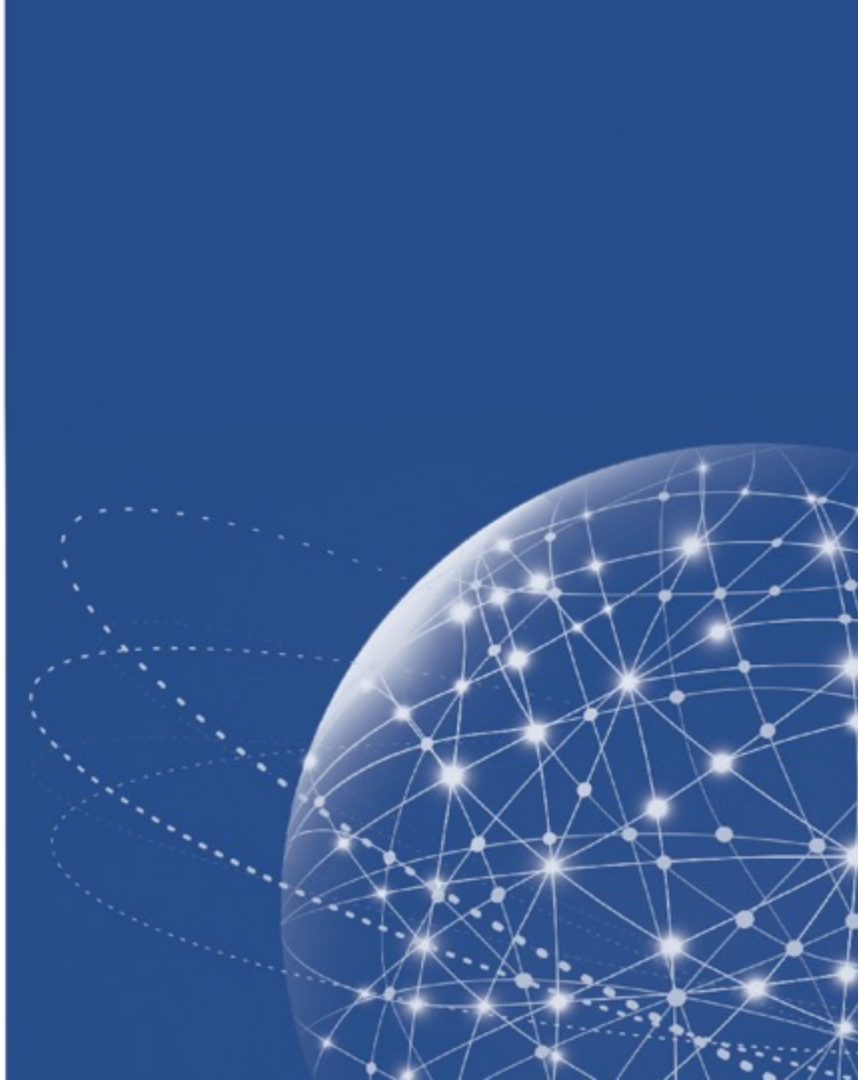
WISHING YOU
HEALTH, SAFETY,
& PEACE OF MIND



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