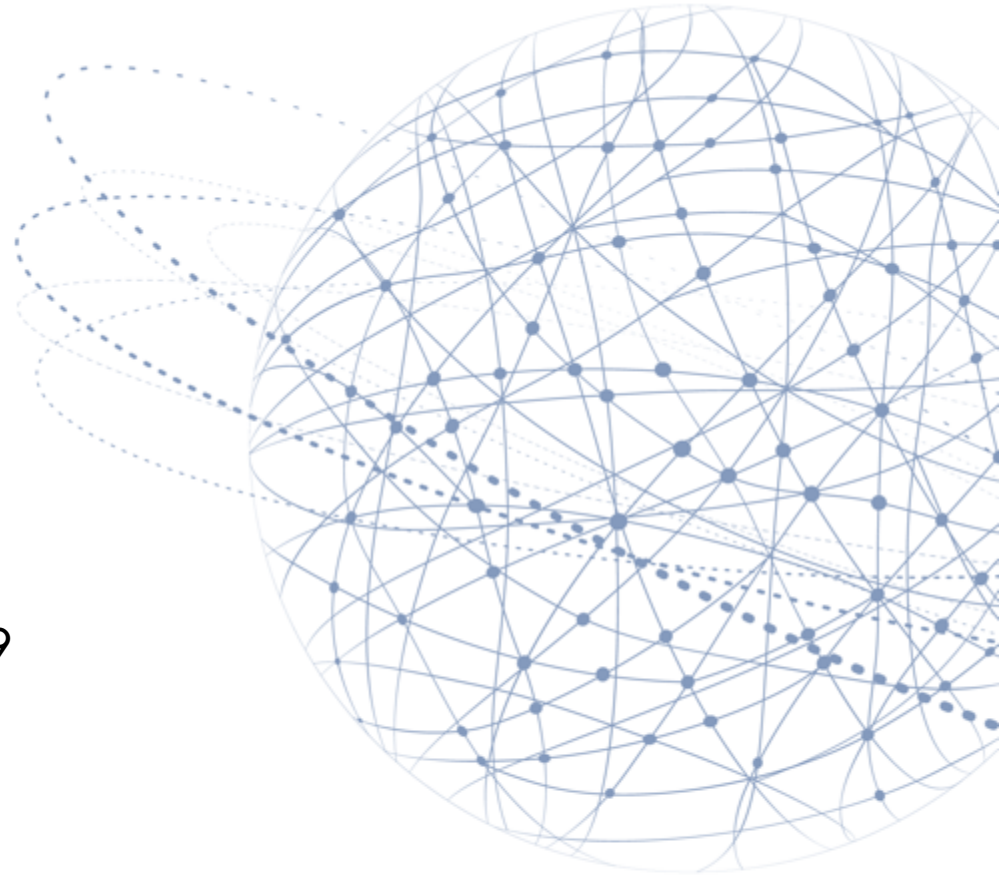




U.S. Consumer Attitudes about COVID-19

Wave 3 - April 2020



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

- 🌐 March 18: n=803
- 🌐 March 24: n=819
- 🌐 March 31 & April 1: n=1,611

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



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.





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?

	18-Mar	24-Mar	31-Mar
n=	803	819	803
Sig. Diff.†	4%	4%	4%
My health/well-being	56%	57%	58%
Saving money	50%	47%	49%
Taking good care of my family	46%	52%	53%
Reducing stress	34%	30%	31%
Feeling more secure	25%	25%	25%
Products that leave me feeling satisfied	21%	18%	20%
Feeling more in control	19%	18%	13%
Feeling good about myself	17%	16%	15%
Saving time	16%	19%	17%
Buying from companies that are consistent with my values	8%	8%	9%
Buying from companies that understand me and my needs	5%	7%	7%
Making a good impression on others	3%	4%	3%

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

Blue: significantly higher than March 18

Red: significantly lower

• Health/well-being, saving money, and taking care of their families continue to be at the top of consumers' minds.

• “Taking care of my family ” is getting increasingly important with time.

• And “Feeling more in control” has dropped in priority – perhaps an acknowledgement of how little control individuals have in this situation?

• Other observations:

• 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.

• Making a good impression on others is very low – is the new social currency not buying anything at all?



- It is getting harder to put on a brave face.
- Three weeks into our monitoring of consumers' emotional state, they are just as likely to say they are **tired** as they are to mention feeling **happy**; it seems as though many are trying to stay positive and get on with their lives, but are starting to feel the strain of this crisis on their mental well-being; they're also increasingly **bored**, and continue to be **anxious**, **worried**, and **sad**.

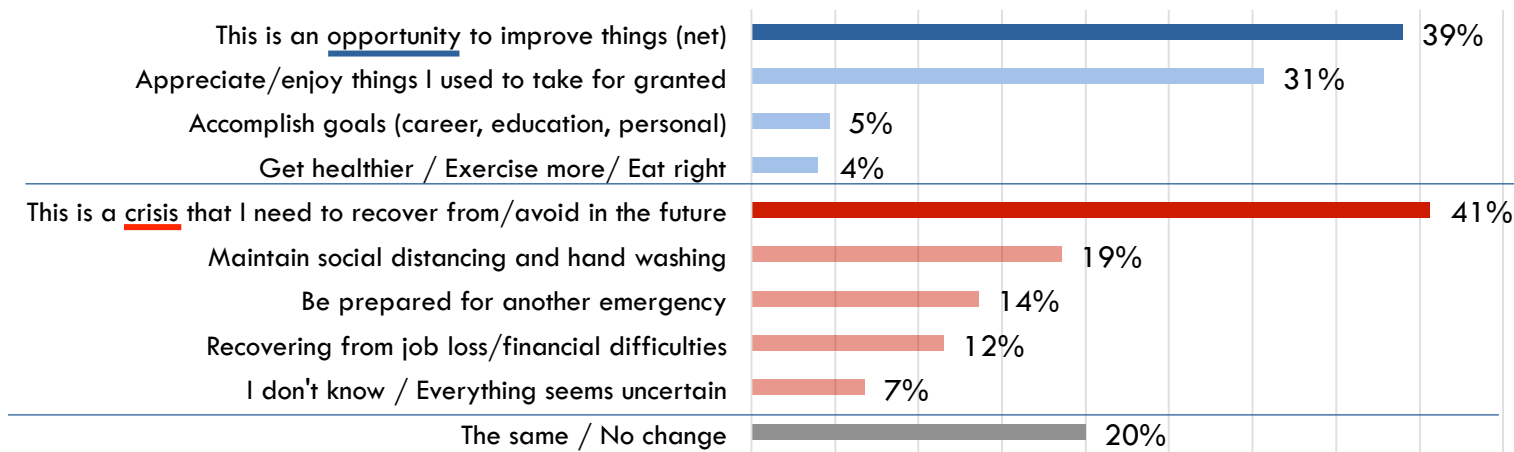
What 3 words describe your emotions today? – Top Words Mentioned (%)

Total Sample			Income Decreased		
18-Mar	24-Mar	31-Mar	18-Mar	24-Mar	31-Mar
Happy 22%	Happy 18%	Tired 19%	Tired 21%	Tired 19%	Tired 23%
Tired 20%	Tired 17%	Happy 18%	Happy 16%	Happy 17%	Bored 23%
Anxious 15%	Bored 15%	Bored 18%	Anxious 15%	Anxious 16%	Happy 14%
Worried 11%	Anxious 13%	Anxious 14%	Sad 15%	Sad 12%	Anxious 14%
Sad 10%	Sad 10%	Worried 11%	Worried 14%	Worried 11%	Worried 9%
Bored 9%	Worried 10%	Sad 10%	Bored 9%	Bored 11%	Sad 10%
Concerned 8%	Concerned 7%	Relaxed 7%	Stressed 9%	Scared 7%	Relaxed 7%
Stressed 7%	Scared 5%	Concerned 7%	Concerned 8%	Concerned 5%	Concerned 7%

- **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)

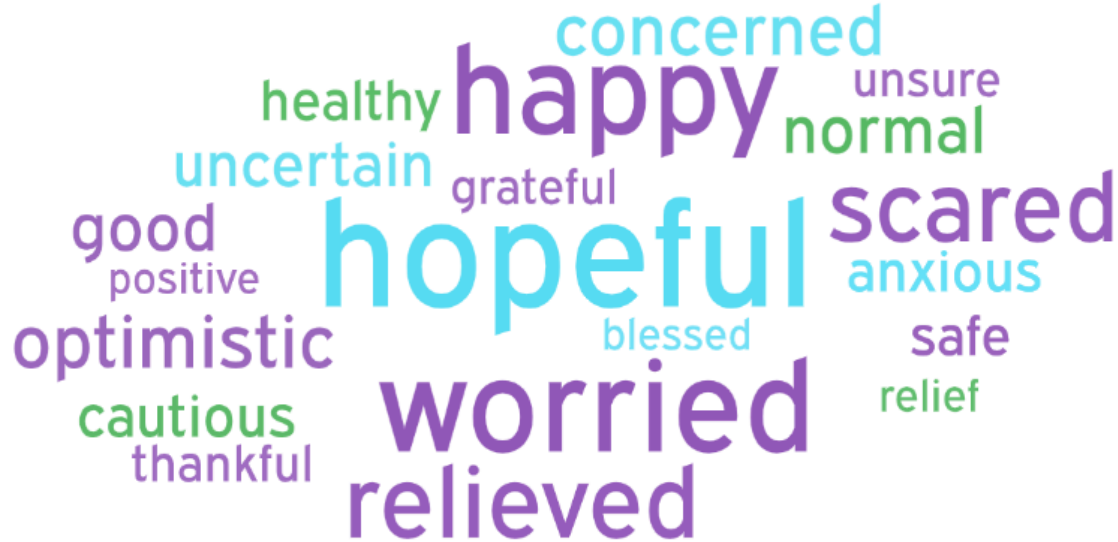




- Thinking about the future, consumers are worried, but cautiously hopeful.



What 3 words would you use to describe how you feel about your / 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.



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 (n=803)	March 24 (n=819)	March 31 (n=803)	April 1 (n=808)
Yes - should change (net)	52%	52%	66%	90%
Acknowledge what's going on	7%	9%	12%	40%
Encourage social distancing/good hygiene	1%	4%	9%	46%
Be compassionate/reassuring / Encourage kindness	9%	5%	8%	40%
Help make staying home easier (Delivery, ways to stay occupied)	3%	4%	6%	42%
Stop advertising activities that can't happen now (restaurants, vacations)	8%	6%	6%	32%
Tell us how you're helping protect my health and well-being	4%	4%	5%	35%
Show how you are helping the community	--	--	5%	--
Help spread awareness about how to prevent the spread of the virus	4%	1%	3%	37%
Stop advertising altogether	--	--	3%	--
Offer discounts	--	--	2%	36%
Address/acknowledge supply issues / Discourage hoarding	7%	4%	2%	--
Yes (non-specific)	2%	7%	2%	--
Help people who are struggling financially	4%	5%	1%	34%
Provide some much-needed cheer and warmth	3%	3%	1%	30%
Nothing/No (Keep things as normal as possible)	32%	36%	29%	23%
Stop talking about coronavirus so much	--	--	--	14%
DONT do anything special – just proceed with business as usual	--	--	--	9%
This is already happening	--	--	4%	4%
I don't know	13%	12%	9%	9%

Blue: significantly higher than March 18

Red: significantly lower

• As the COVID-19 crisis wears on, even more consumers want to see advertisers play a positive role in addressing it.

- They increasingly would like Brands to acknowledge the crisis and provide leadership in encouraging good social distancing and hygiene practices.
- And, open-ended, a new theme has emerged of wanting to see how businesses are helping the community.
- While supply issues/hoarding were prominent in consumers' minds 3 weeks ago, this is becoming less of an issue as stores have had an opportunity to restock.
- When presented with a list of options, 90% think advertisers should change something, with the top choices being encouraging social distancing and making staying home easier.
- Still, without the prompt (open-ended), close to one-third wouldn't recommend any changes happen at all, and/or are tired of hearing about it.

- **Consumers generally indicate that the Internet, hand sanitizers, toilet paper, food, and wipes are their heroes right now.**

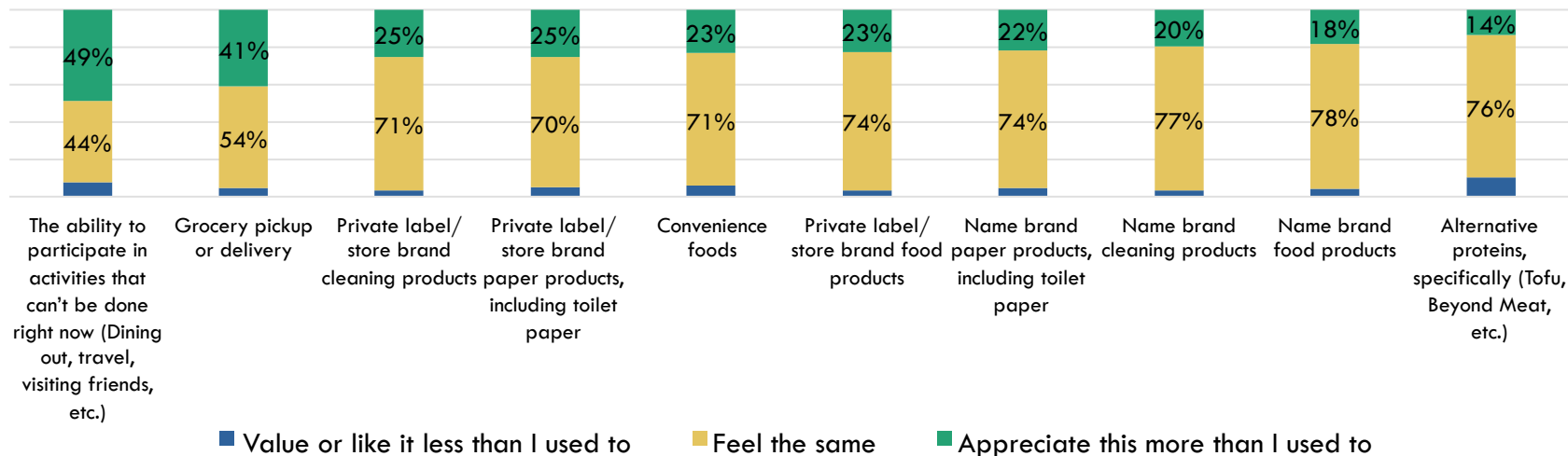
- A few specific brands get shout-outs: Netflix, Amazon, Zoom, Clorox, and Lysol.
- And others specifically mentioned workers, particularly grocery store employees, healthcare workers, and delivery people.

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



- **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 April 1 Total Sample (n=808)

Some Good News

As often happens in a crisis, people are taking comfort in the positive stories that can be found.

The popularity of John Krasinski's "Some Good News" series on YouTube (check it out if you need cheering up!) is one example, and on the following pages we have just a small selection of the things consumers have told us that are brightening their world a bit.



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 inside

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

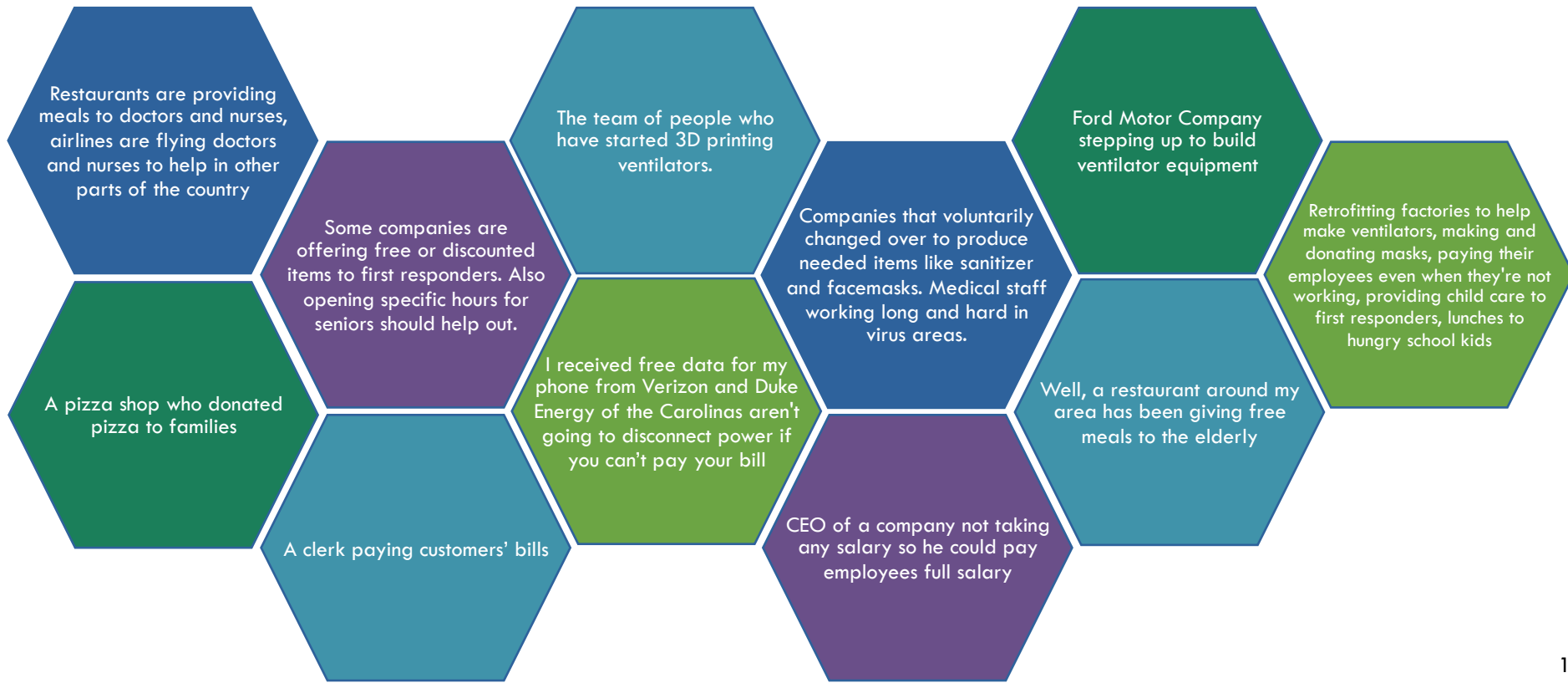
I am hoping people will be more open and accepting of other people and be kinder to each other.

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.



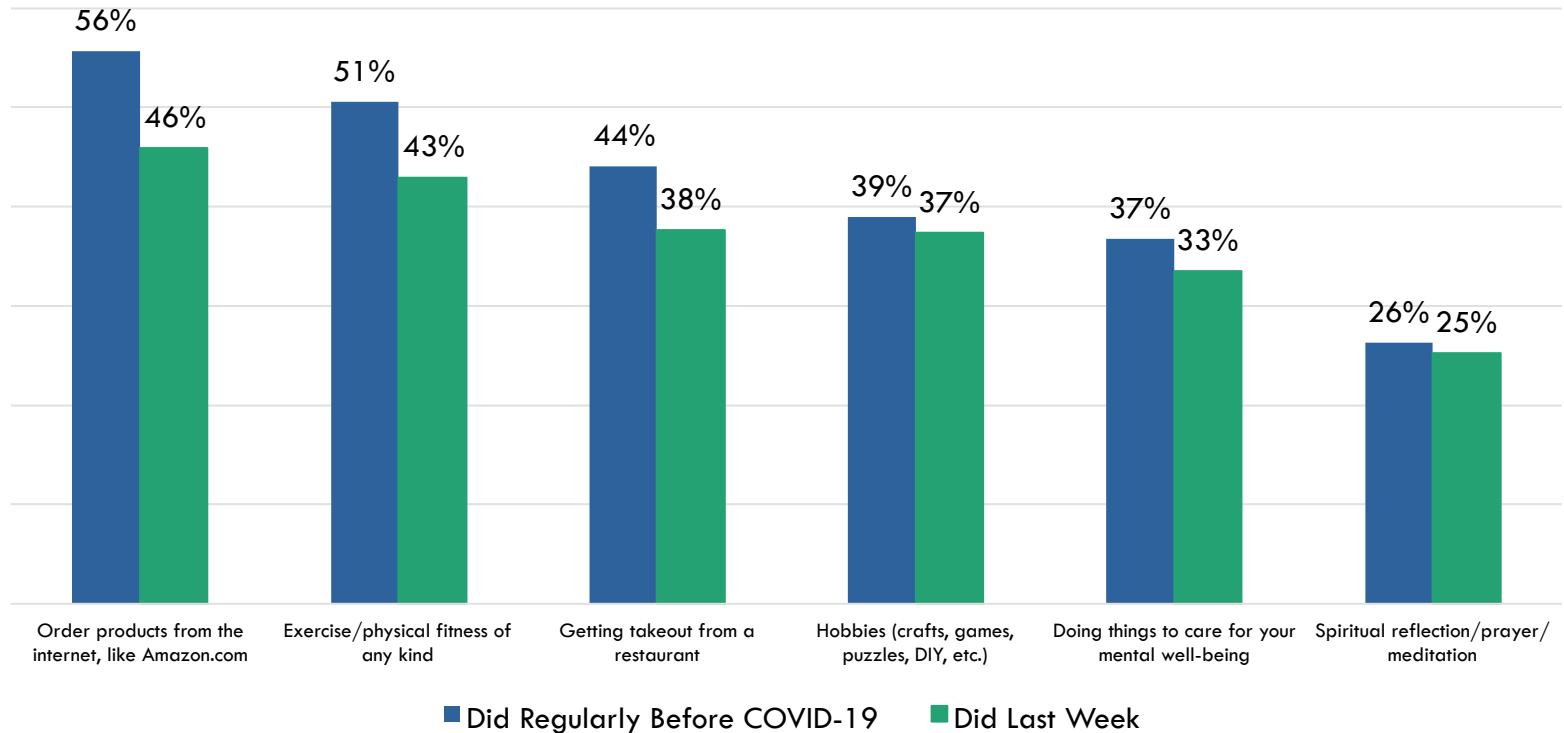
How have behaviors/ lives changed?

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



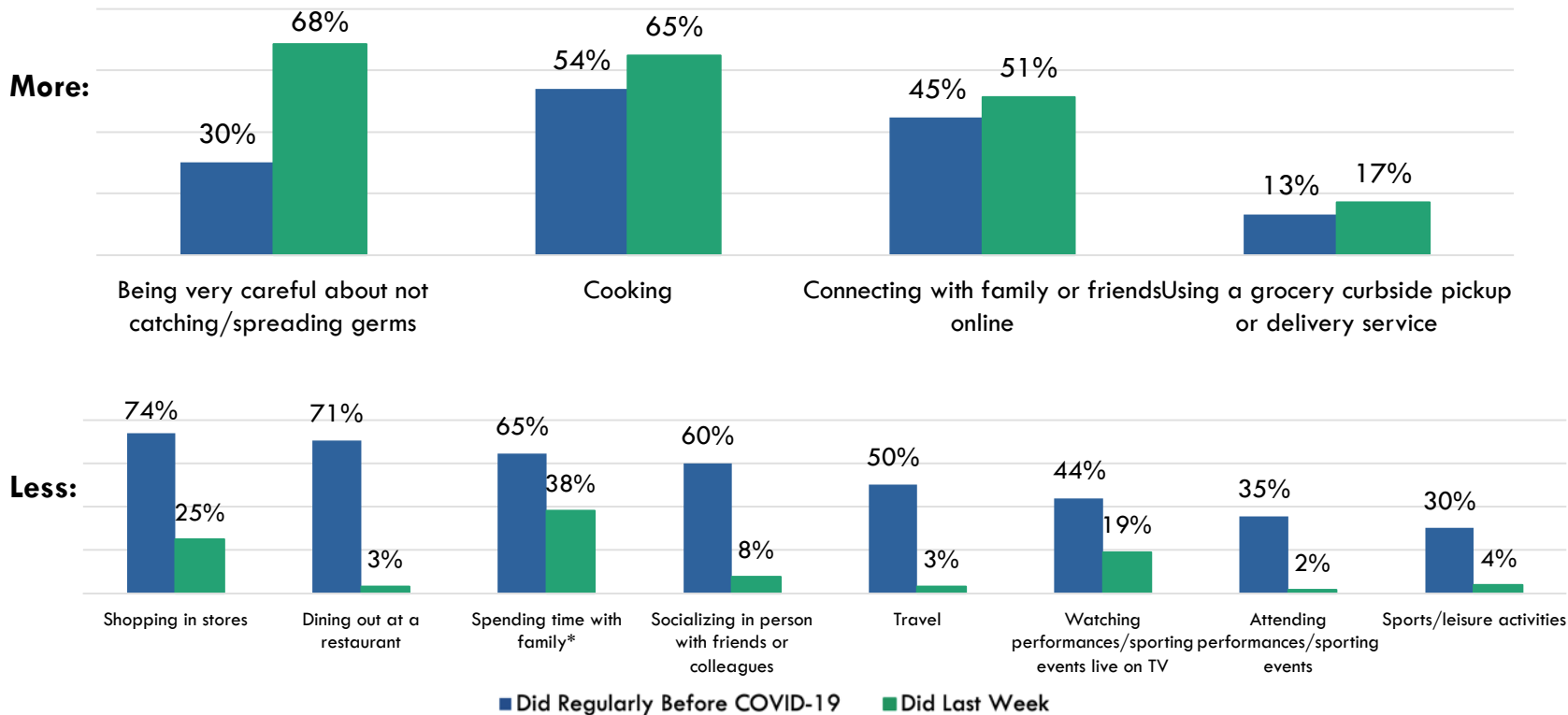
What behaviors seem largely unchanged, when comparing last week's behavior to the weeks before the crisis?

- **Last week, fewer people engaged in online shopping, exercise, and getting takeout than they do regularly, but considering the difference in time frames, it seems like these behaviors are pretty consistent.**
 - It seems like the surge 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.



What behaviors have changed?

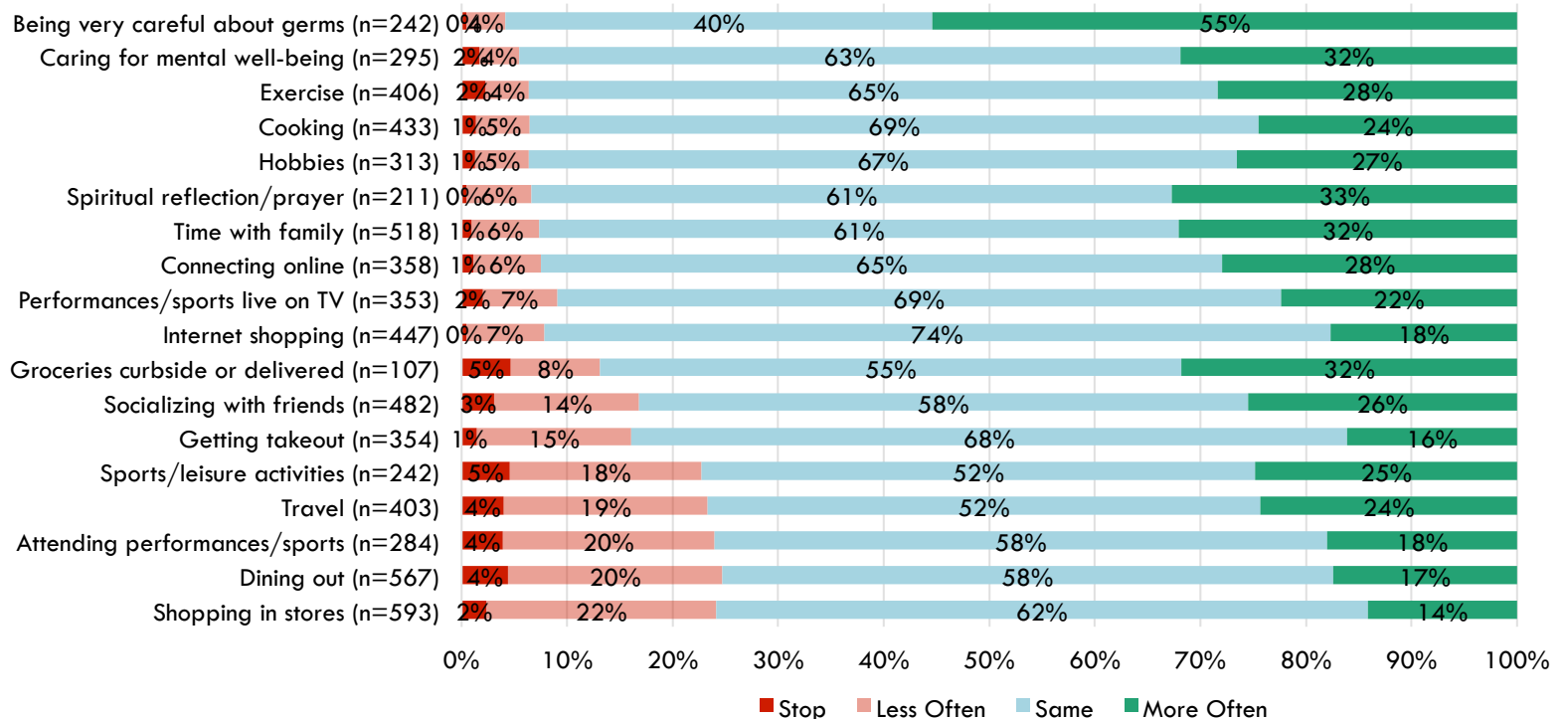
- We are encouraged that reported behavior shifts reflect a social distancing-based lifestyle.



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

- **Around 20% of those who used to participate in sports/leisure activities, travel, sport 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.

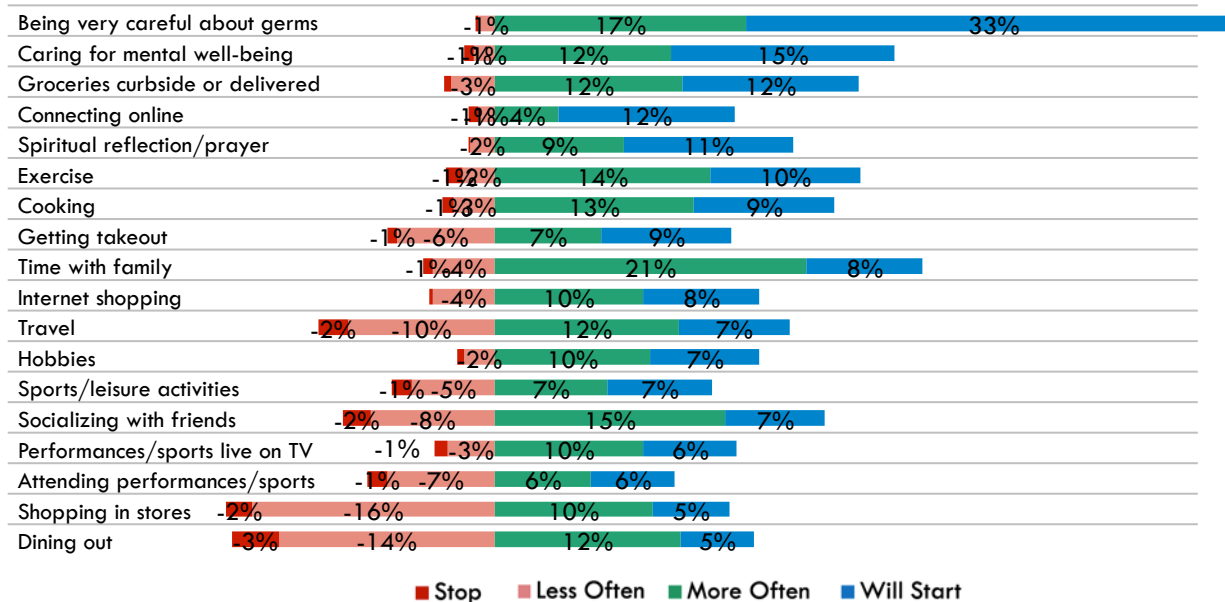
After this crisis is over, how OFTEN do you think you'll do each of the following, compared to what you did before the crisis?
Among Those Who Regularly Did Each Before Crisis



- 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 do 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)



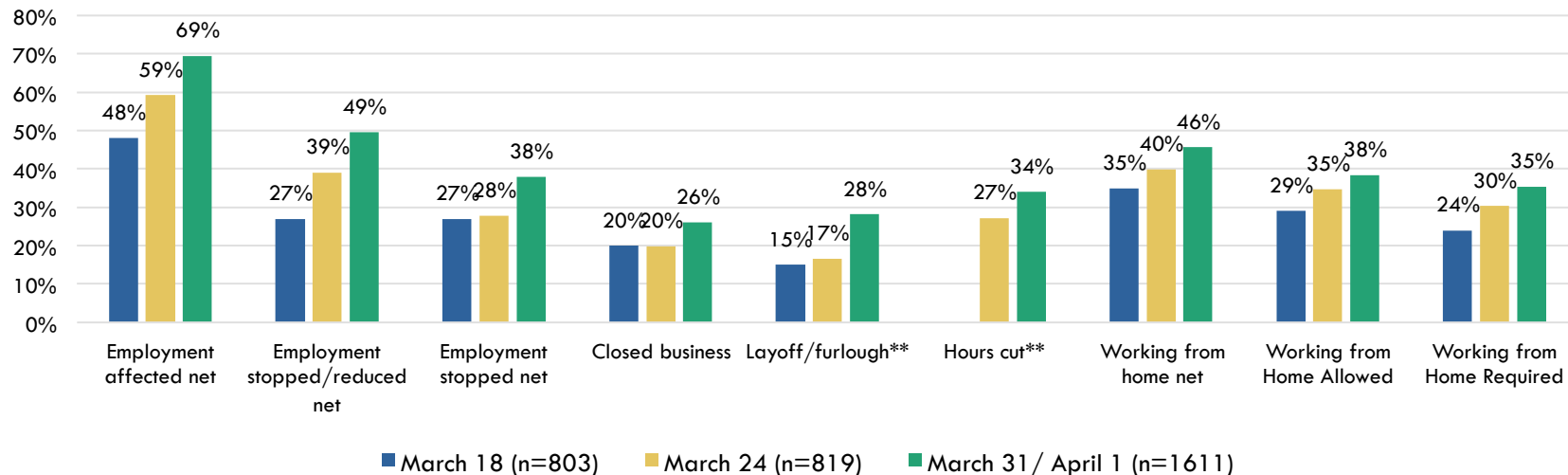
Note: those who don't intend to change (will either continue, or won't start) excluded from % reported.

How are economic changes influencing consumers?

Unemployment numbers never tell the whole story.



- The number of employees impacted by the shutdown measures continues to climb week-over-week.
- 69% of American workers have had their employment impacted in some way.
 - We assume that many of the other 31% 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.

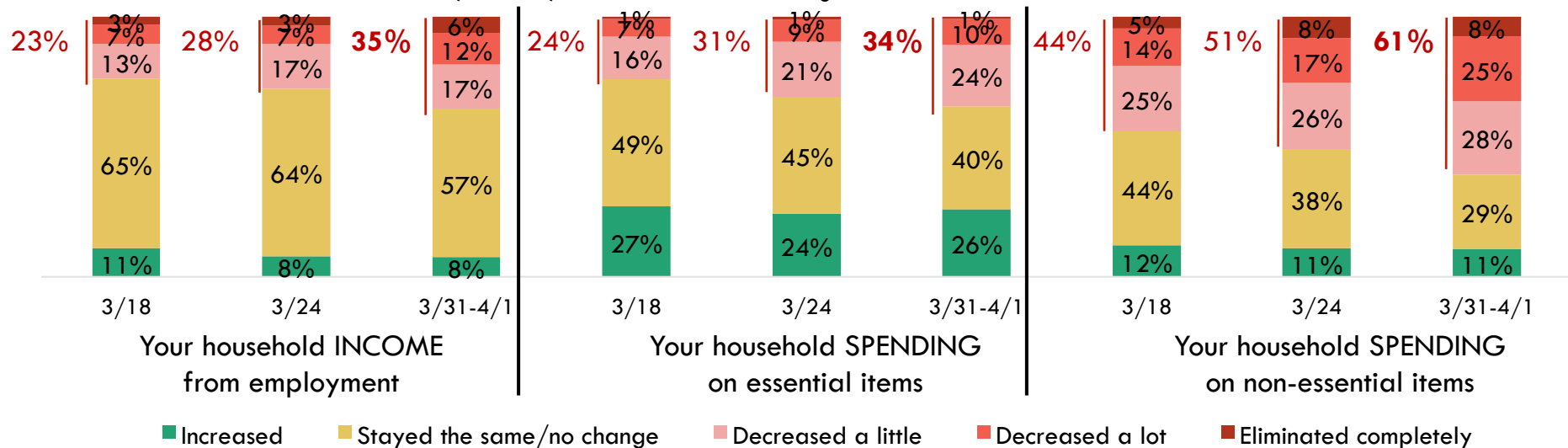


** "Furlough" added on 3/31 "Hours cut" added on 3/24

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 – an increase from 28% last week – and over 60% have decreased their non-essential spending.**
- 34% have even decreased what they consider to be “essential” spending.

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



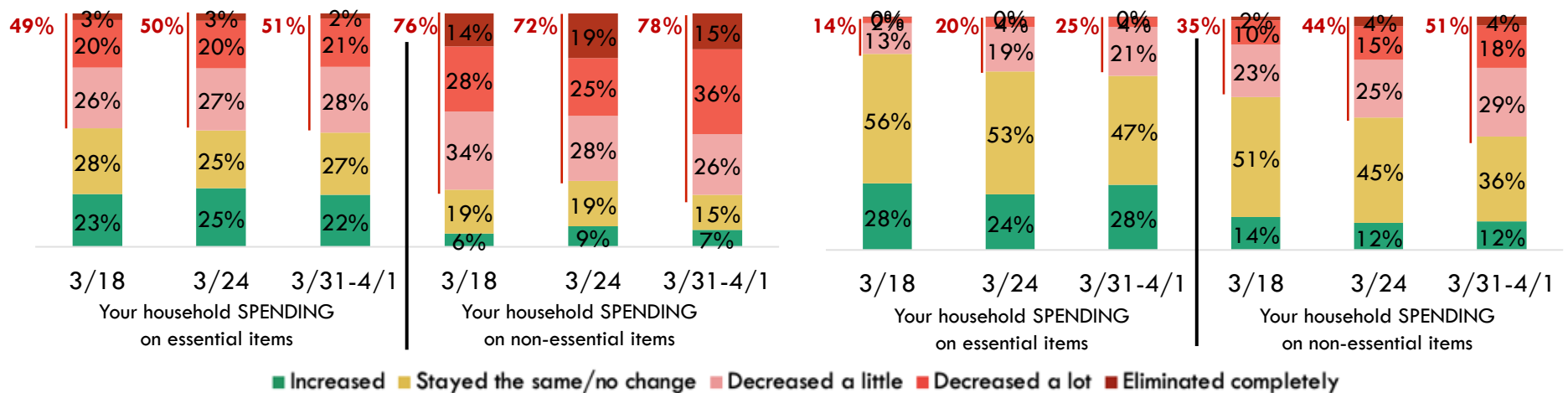


- Those with a loss of income have generally curbed their spending on essential and non-essential items alike even more, although some have had to increase their spending on essential items.
- While those without a loss of income have so far generally not been reducing their spending as much, they are definitely starting to spend less, as well.
 - Some of this may simply reflect that they *can't* spend money on the things they used to spend it on (dining out, movies, etc.), but it also almost certainly has to do with uncertainty about the future of their job and the economy. We'll try to probe on this in a later wave.

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

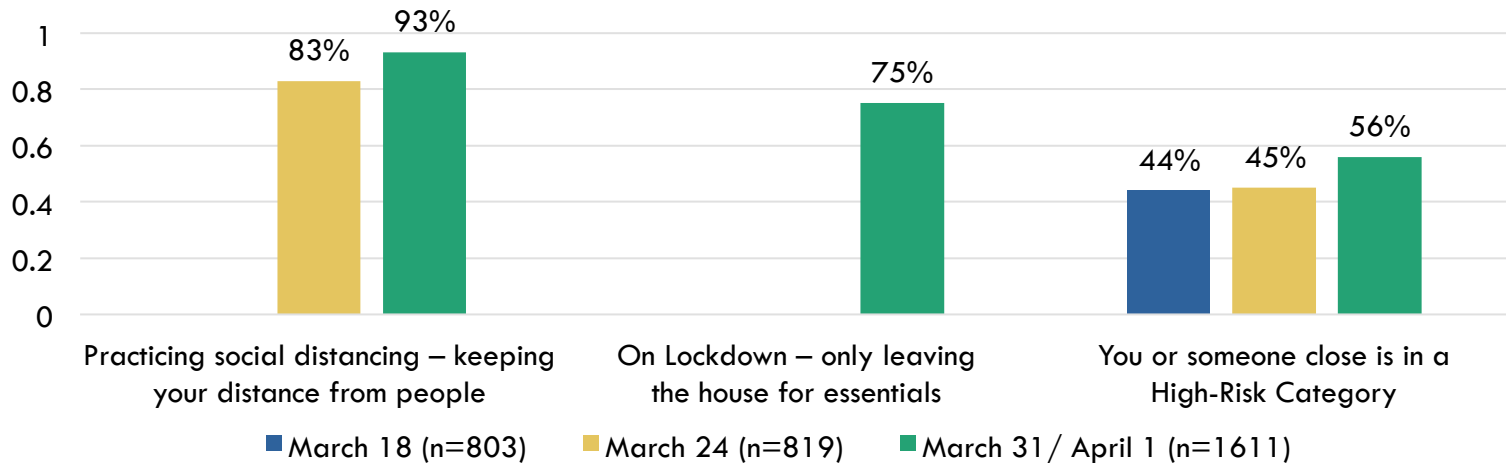
Have Experienced A Loss of Income

Have Not Experienced A Loss of Income



- **93% of consumers report that they are now practicing social distancing, up from 83% last week, and 75% are on “lockdown,” leaving their house only for essentials.**
- **Interestingly, a higher percentage of consumers now indicate that they or someone close to them is in a High-Risk Category.**

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.



- 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%
Employment affected net	69%	81%	89%	59%	65%	75%
Employment stopped/reduced net	49%	61%	81%	32%	48%	52%
Employment stopped net	38%	47%	64%	24%	37%	40%
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%
Working from home net	46%	54%	41%	48%	42%	51%
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

- 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?						
	March 24	Parents	HH Income decreased	HH Income not decreased	High Risk	Not High Risk
n=	819	239	226	593	88	731
Sig.Diff.†	4%	8%	8%	5%	12%	4%
Employment affected net	59%	71%	78%	52%	53%	64%
Employment stopped/reduced net	39%	50%	69%	28%	38%	40%
Employment stopped net	28%	33%	50%	19%	27%	29%
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%
Working from home net	40%	49%	38%	41%	34%	45%
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



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

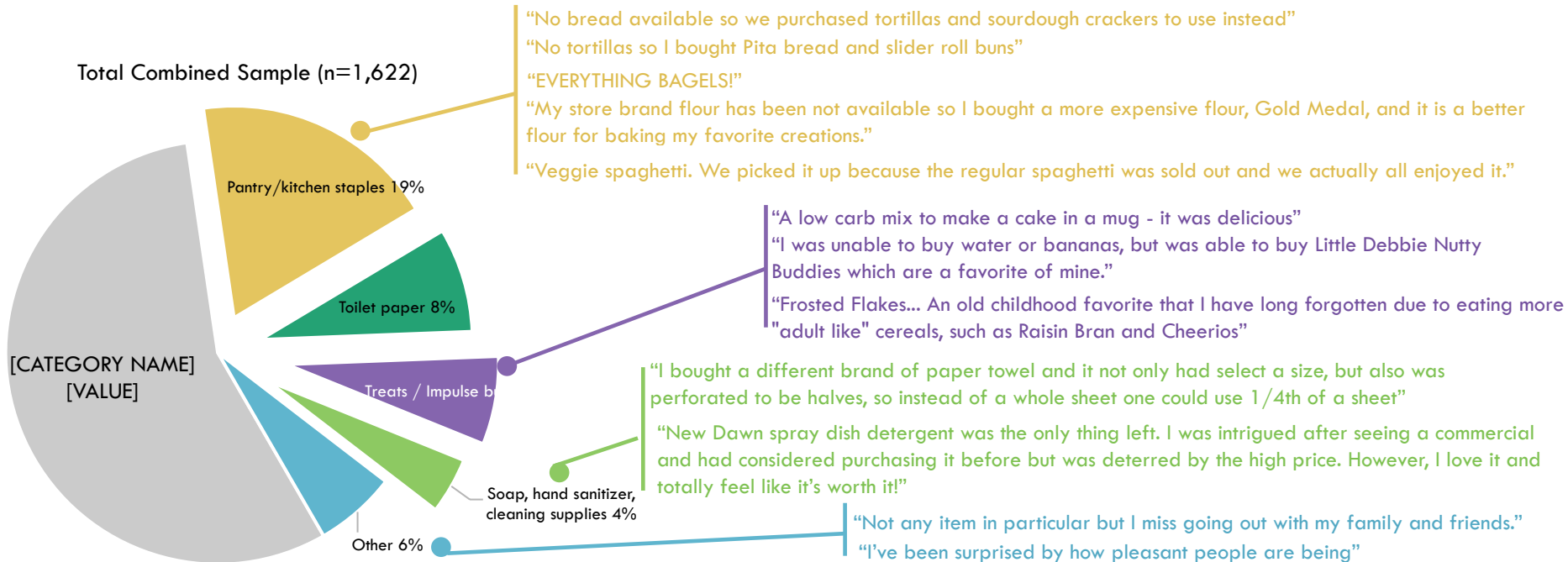
- Parents in particular are using social media for information, perhaps from local parent groups about school at home.
- Parents are also more likely to be participating in activities for the care, feeding, and education of their kids.
- Those who've experienced a drop in income are more likely to be 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%
Average Number of Increased Activities:	4.7	5.7	5.5
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%

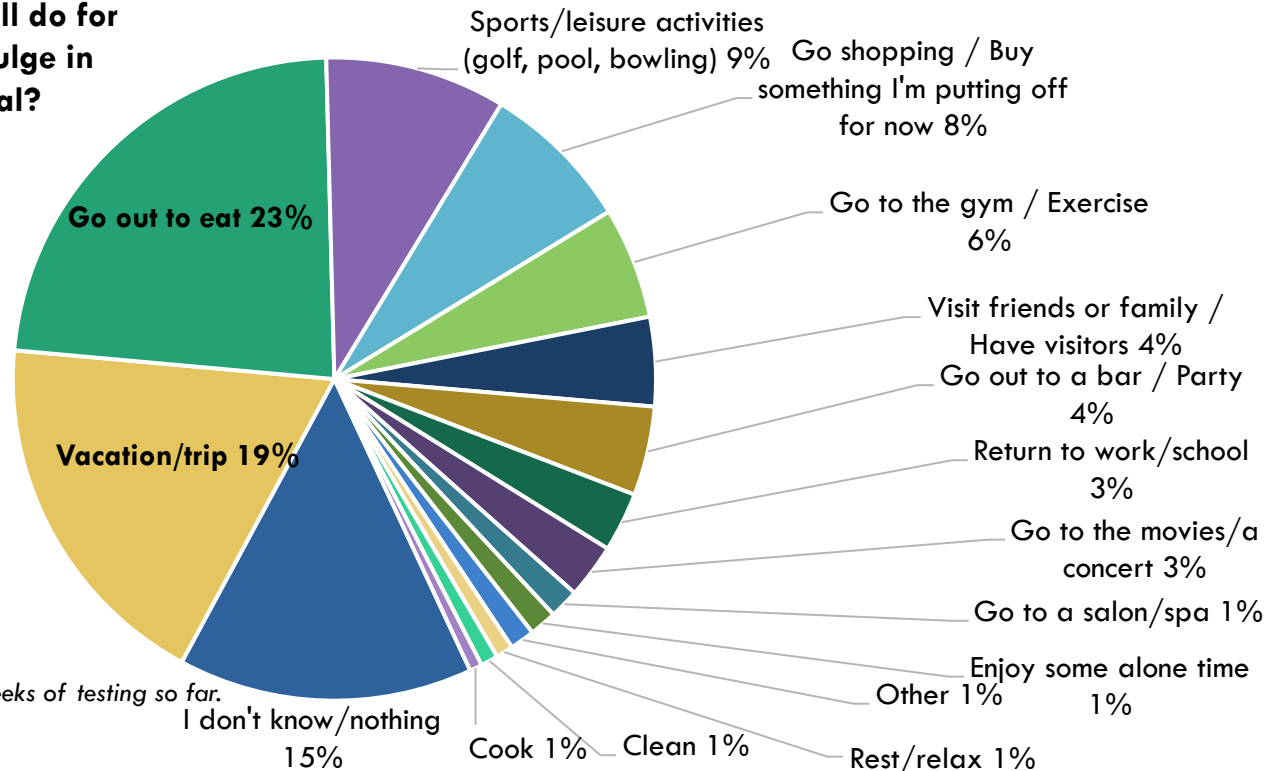
- As many as 44% of consumers have branched out and tried something new, suggesting this may be a time for some experimentation and indulgence, and to build new loyalties.

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.)

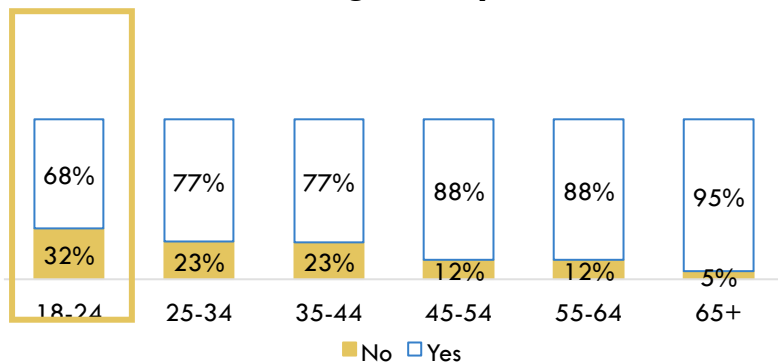
Answers basically identical across two weeks of testing so far.



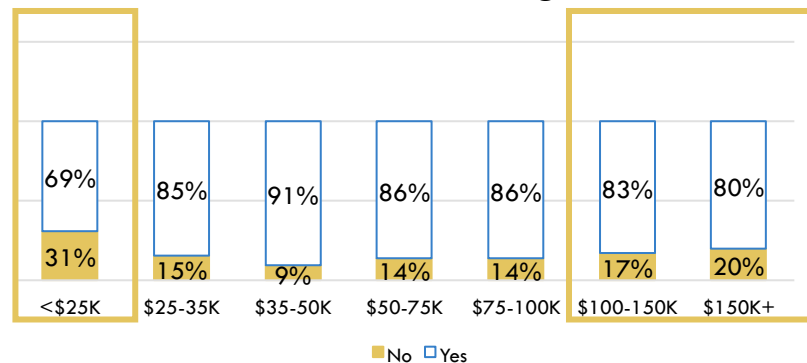
Who's social distancing ... and who's **NOT**?

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

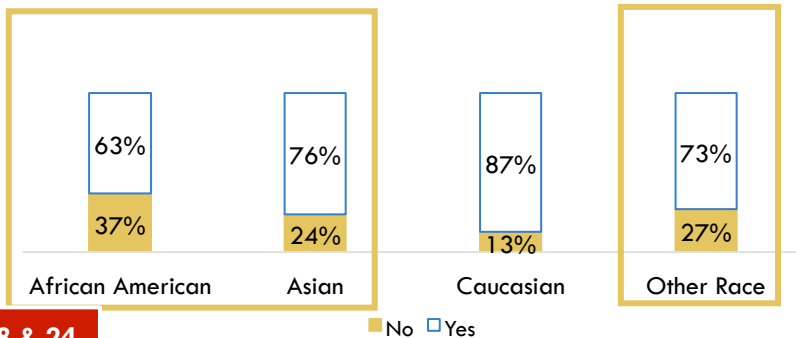
Younger People



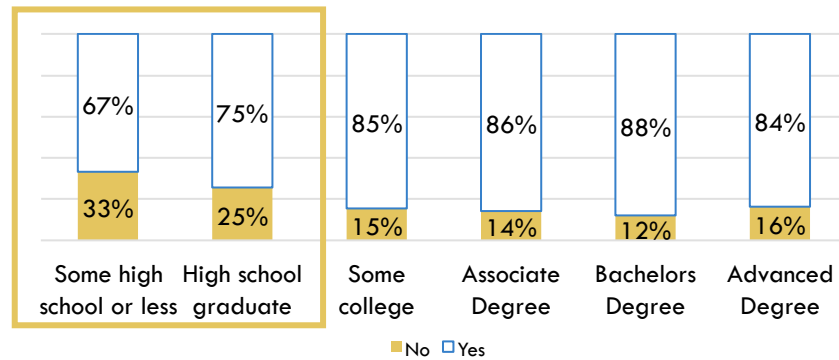
Those With The Lowest (or Highest) Incomes



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.

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or your Account Manager

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HEALTH, SAFETY,
& PEACE OF MIND

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