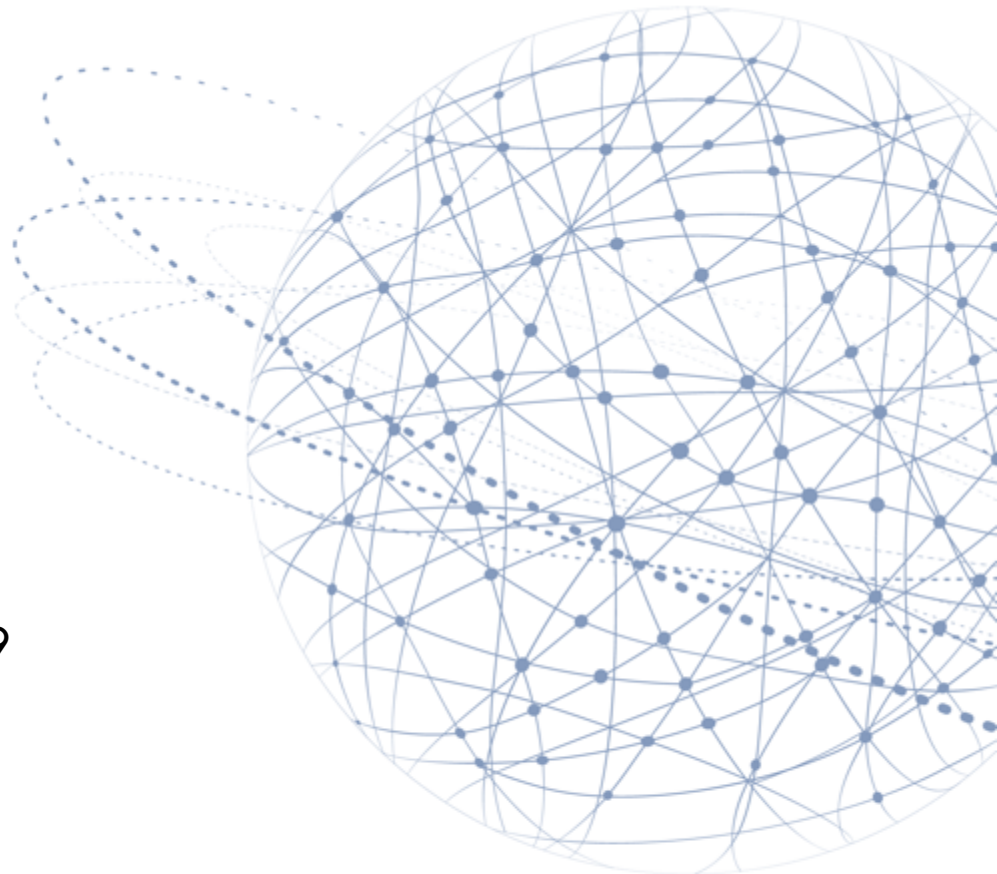




## U.S. Consumer Attitudes about COVID-19

Waves 6 & 7: Through May 1



## 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 3% @ 90% confidence)

Report #	Field Date	n=
1	March 18	803
	March 24	819
2	March 31	803
	April 1	808
3	April 8	982
	April 14	970
	April 16	825
4	April 23	900
	April 30	800
	May 1	865

Download previous waves here:

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

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

## Wave 6 & 7 Key Takeaways:

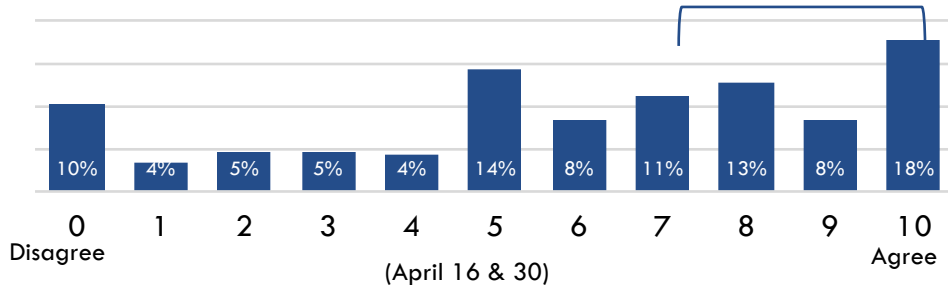
- **(🌐) Government restrictions have little to do with consumers' decisions about getting back into public life; personal perceptions of safety are what matter.**
  - Two-thirds of those who have stopped shopping in stores, going to restaurants, etc., say they will wait until it feels safe to go back, rather than go back as soon as it's *allowed*.
  - Therefore, providing reassurance will be paramount to winning business back.
  - For retailers, a combination of sanitization steps, enabling handwashing/sanitizing at entrances/exits, and screening employees for illness appeals to about three-quarters of consumers.
  - Restaurants also need to have rigorous sanitization protocols, and provide seating that's at least 6 feet away from other diners, as well as other specific recommendations for dine-in vs. QSR.
- **(🌐) Willingness to make sacrifices is high and stable for Women 45+, but waning among others, particularly Young Men (18-44).**
  - Even men in this age group are nervous about ending the lockdown too soon, though.
- **(🌐) Consumer emotions and priorities suggest that many are still in survival mode, just trying to get by from day-to-day.**
  - Increasingly, saving money is more likely to be important than health/wellness or protecting family members.

# Guidelines for Retailers and Restaurants

How can brick-and-mortar establishments maximize visitor comfort and confidence as the economy reopens?

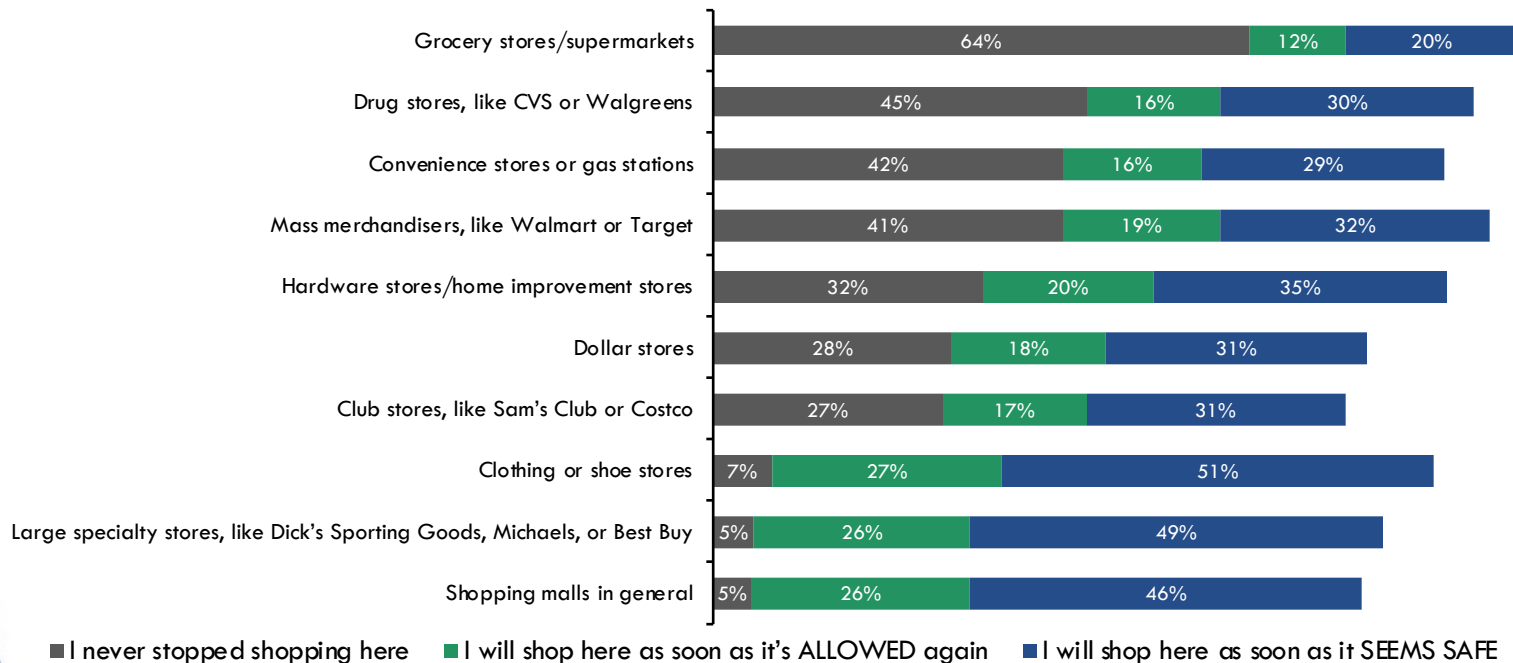
*“I am nervous about going back into public even after restrictions have been lifted”*

**50%**  
Agree!



- Across retail channels, only one-third of those who have stopped shopping will go back simply because they are allowed to.
- Two-thirds will use their own judgement to determine if it's safe or not (and 75% of this group agree strongly that current government restrictions are appropriate and necessary\*).

We know that many stores offer curbside pickup, but how do you feel about SHOPPING INSIDE the following types of STORES?

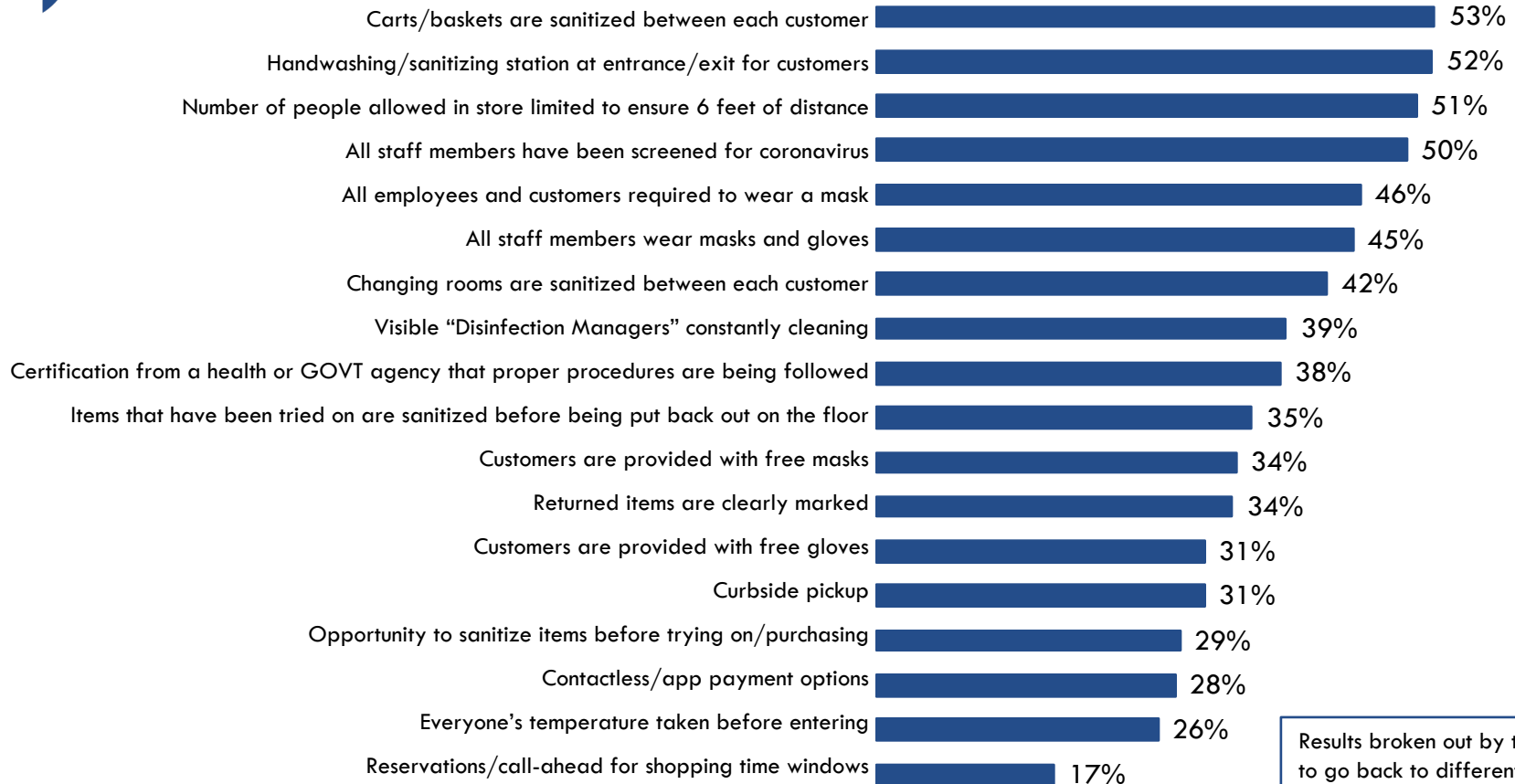


Among May 1 Total Sample (n=865) – Differences of 4% are generally significant at the 90% confidence level.

\*Follow-up data gathered on May 7 – available upon request and will be in next wave of report.



## Which of the following would make you feel comfortable shopping at a RETAILER?



Results broken out by those waiting to go back to different retailers available upon request.

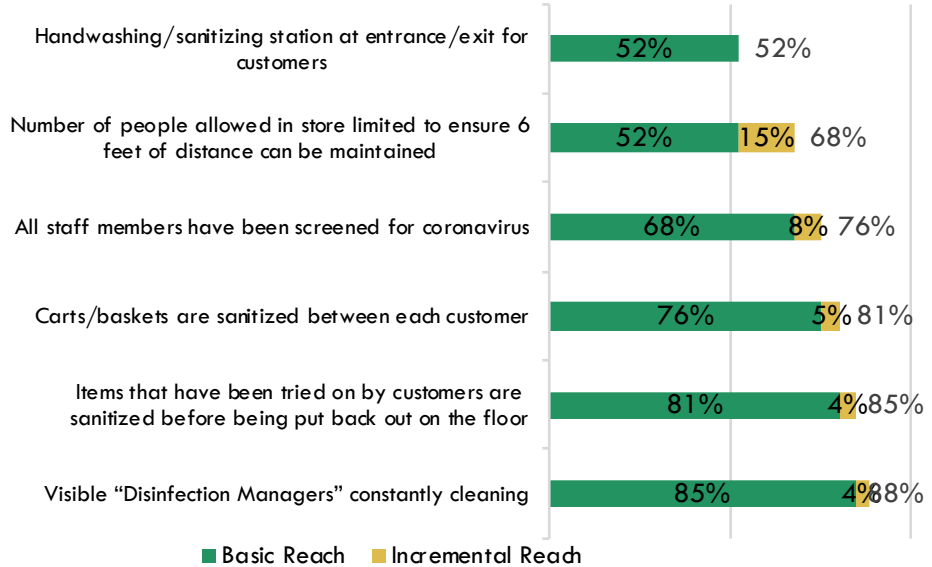
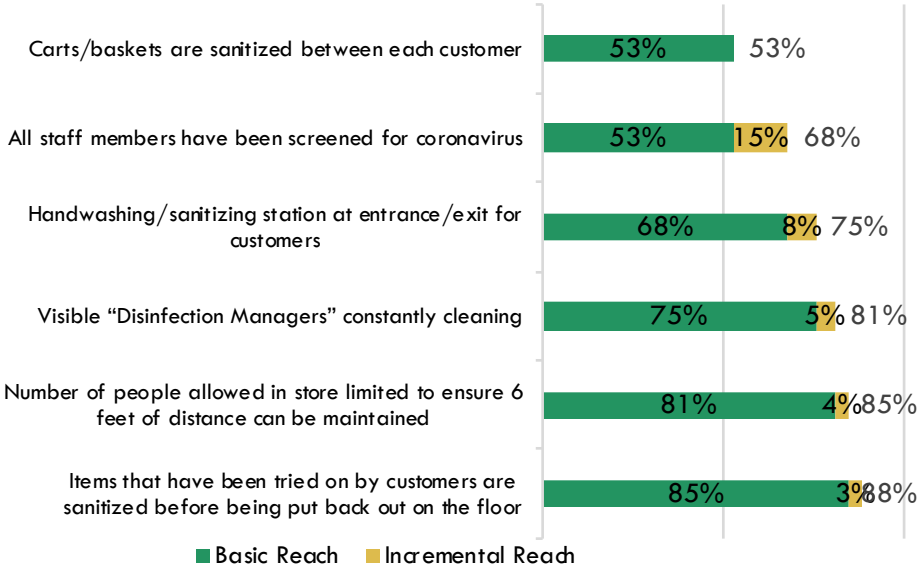


• **Close to 90% of would-be shoppers indicate reassurance could be provided by the combination of solutions listed below, and 75% would feel confident if either of the top-three combinations were implemented.**

- We used a modified TURF analysis to identify which steps provide the most “incremental reach” to the first step(s) included in the list (e.g., 15% of consumers would like “all staff members to be screened” in addition to those who selected “carts/baskets are sanitized”).

*Which of the following would make you feel comfortable shopping at a RETAILER?*

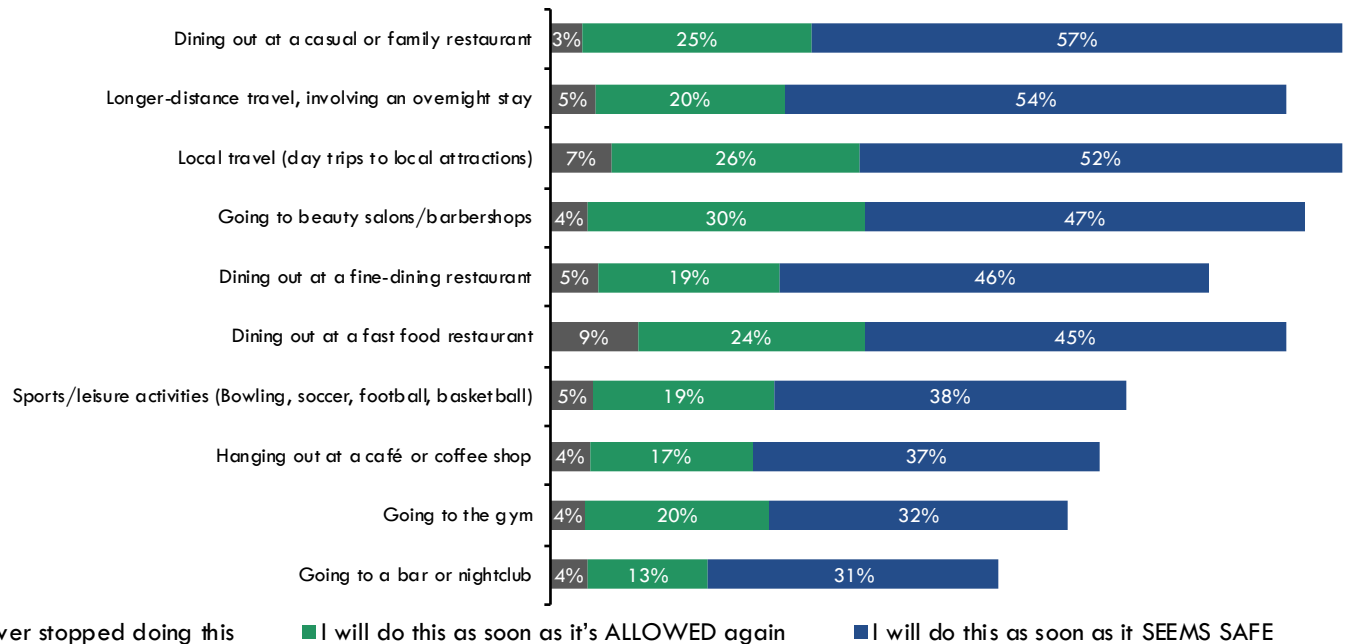
**Unduplicated Reach Analysis (% of sample selecting at least one)**



Among May 1 Total Sample (n=865) – Differences of 4% are generally significant at the 90% confidence level.

- About half of consumers won't go to restaurants, travel, or visit salons until they feel it seems safe, regardless of when restrictions are lifted.
- Similar to retailer learning, only about one-third of those who have stopped these activities will go back as soon as it's allowed, as most have their own standards for safety requiring reassurance.

*Below is a list of activities that are generally not available during the coronavirus pandemic. For each one, please tell us how you feel about starting them back up.*

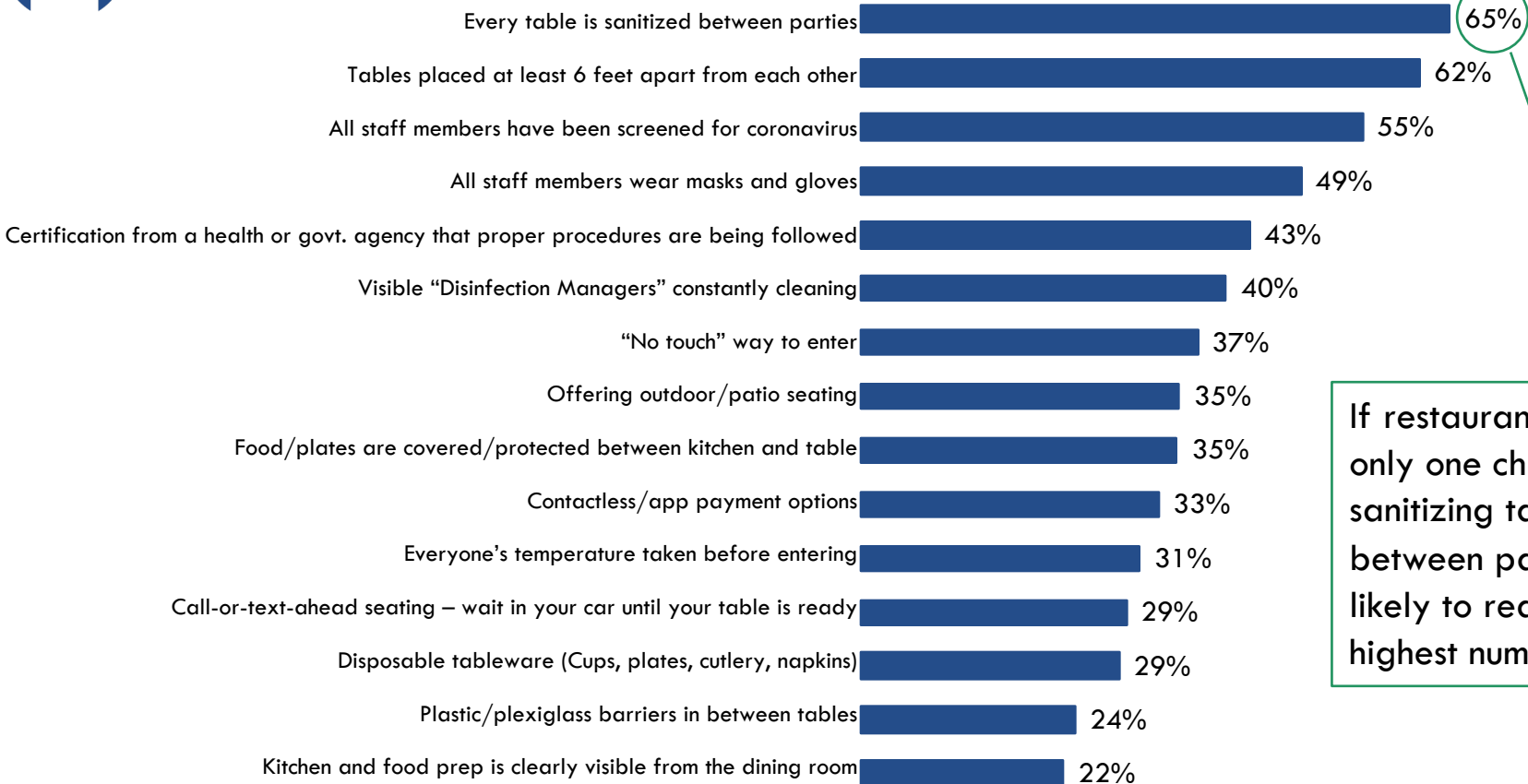


Among May 1 Total Sample (n=865) – Differences of 4% are generally significant at the 90% confidence level.





## Which of the following would make you feel comfortable eating at a SIT-DOWN RESTAURANT?

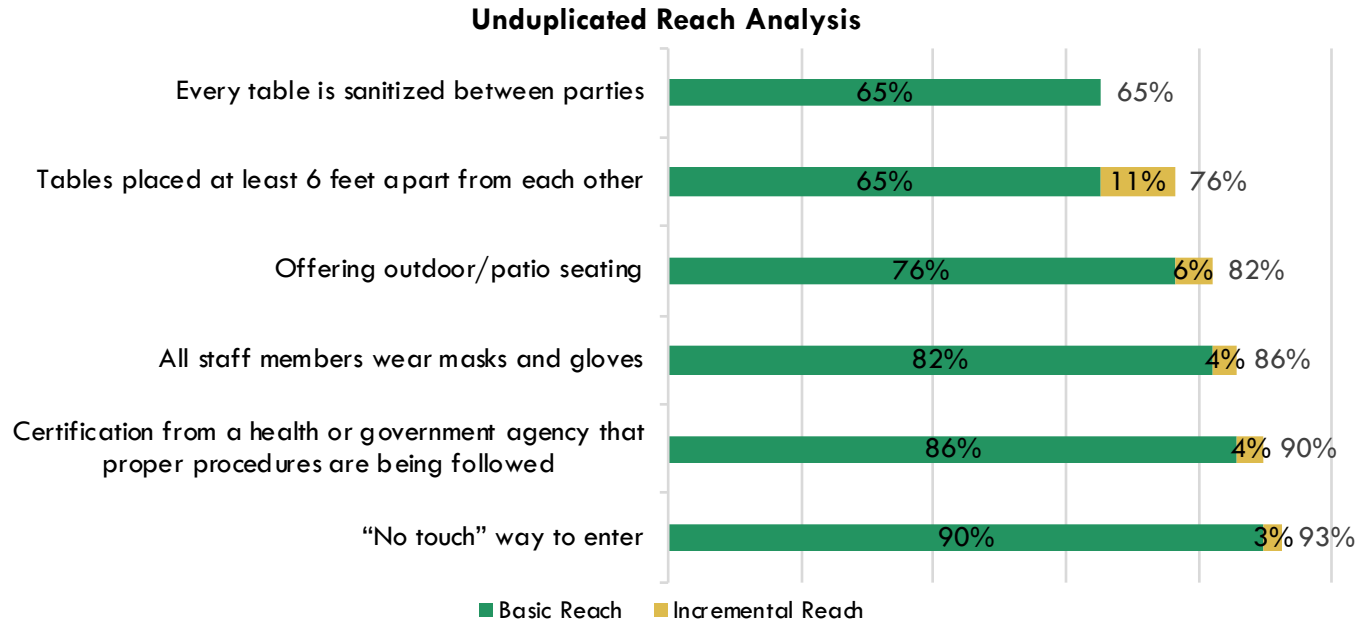


If restaurants make only one change, sanitizing tables between parties is likely to reassure the highest number.



- It will likely take a combination of innovative solutions to bring people back into restaurants and convince them they will be safe while dining – below is one example that might work.
- Many other combinations of solutions generate this level of reach – let us know if we can help you find the optimal mix for your business.

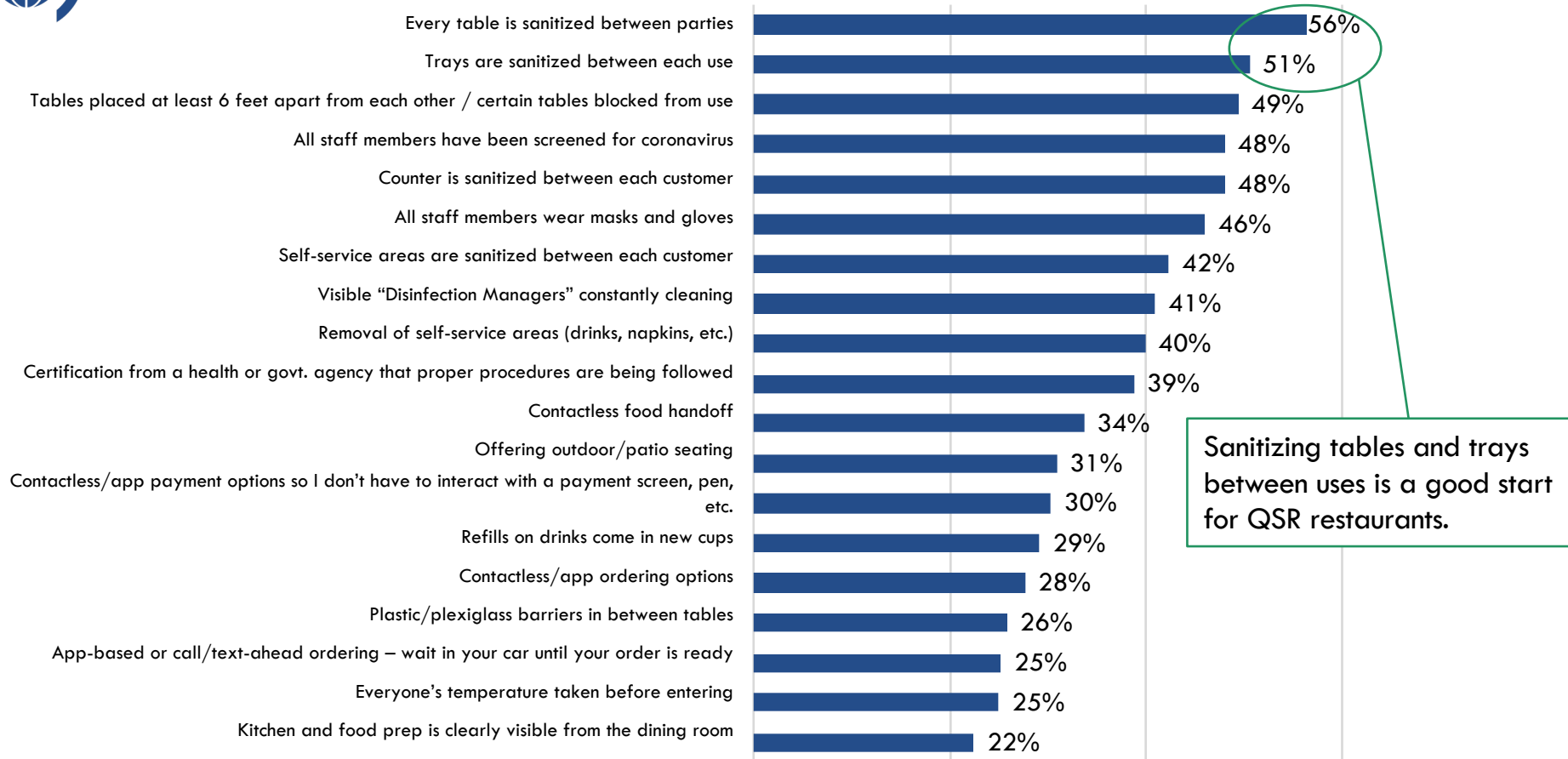
*Which of the following would make you feel comfortable eating at a SIT-DOWN RESTAURANT?*



Among May 1 Total Sample (n=865) – Differences of 4% are generally significant at the 90% confidence level.



## Which of the following would make you feel comfortable eating at a FAST FOOD RESTAURANT?



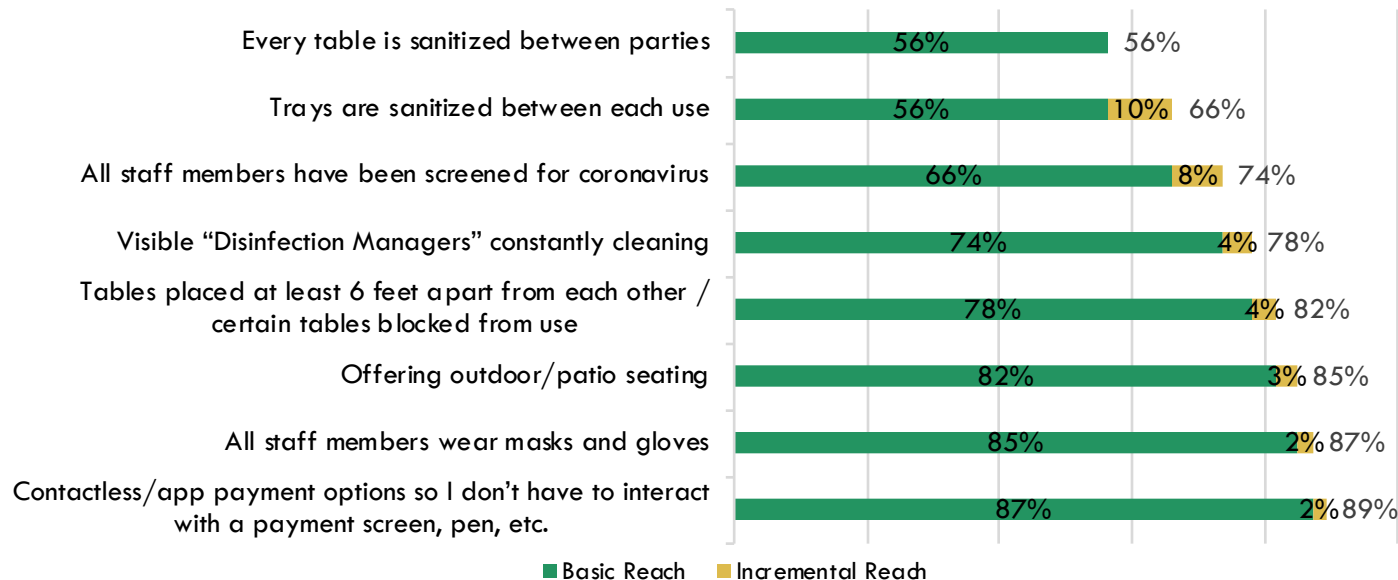
Among May 1 Total Sample (n=865) – Differences of 4% are generally significant at the 90% confidence level.



- Just like sit-down restaurants, it will likely take a combination of innovative solutions to bring people back into QSR, such as the one shown below.
- It may make sense for QSR to continue to focus on drive-thru and curbside pickup options for the near future.

*Which of the following would make you feel comfortable eating at a FAST FOOD RESTAURANT?*

**Unduplicated Reach Analysis**



Among May 1 Total Sample (n=865) – Differences of 4% are generally significant at the 90% confidence level.

## *What other ideas do YOU have for making restaurants or stores safe as they start to re-open? (Verbatim suggestions)*

- Cleaning menus and salt/pepper shakers in between customers. I used to work in restaurants and I know how infrequently these things are cleaned. They are things that people put their hands all over.*
- Those little devices that let you know your table is ready will need to be cleaned between uses. Maybe UV light stations for those.*
- Staff training to ensure sensitivity and instill confidence in the shopper. I want to know that the staff feel safe – that makes me feel safe.*
- Making everyone follow the same rules. It doesn't help if you are the only one doing it. Unity between all the stores at least for the minimum protection. It will be hard to know if one store only has a six feet rule and the next one requires mask and gloves. Consistency.*
- Check HVAC circulation patterns.*
- Clean plastic gloves in dispensers at entrances; a place to dispose of used gloves at exits/shopping cart lots.*
- If employees are ill, they should be allowed to stay home without losing their jobs.*
- Hand sanitizer on the tables, menus disinfected after use, visually being seen that it is done. No contact to enter and leave, tables and booths are cleaned better than in the past.*
- Pathways for entering and leaving customers that don't pass next to seated customers.*
- Post menu on the wall rather than handing to customers and re-using.*
- Sealed straw in plastic provided with every drink. Customers bring own utensils and napkins.*
- If there is someone in the establishment who is not following the rules, they are removed.*
- Dedicated food runners for restaurants that sanitize out in the open before and between each food drop-off.*

# What are general attitudes about lockdowns?

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Protests are happening in state capitols across the country  
– what is the prevailing opinion among US consumers?





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 Sample

% Who agree (7-10)

I'm willing to make some sacrifices if it means MY HEALTH is protected

77%

69%

-8%

I'm willing to make some sacrifices if it means the health OF OTHERS is protected

76%

67%

-9%

I think restrictions that have been placed on public gatherings and local businesses are APPROPRIATE AND NECESSARY

76%

71%

-5%

■ 4/16 ■ 4/30

- In just two weeks, *significantly fewer* consumers say they are willing to make sacrifices for health or are on-board with government restrictions.

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

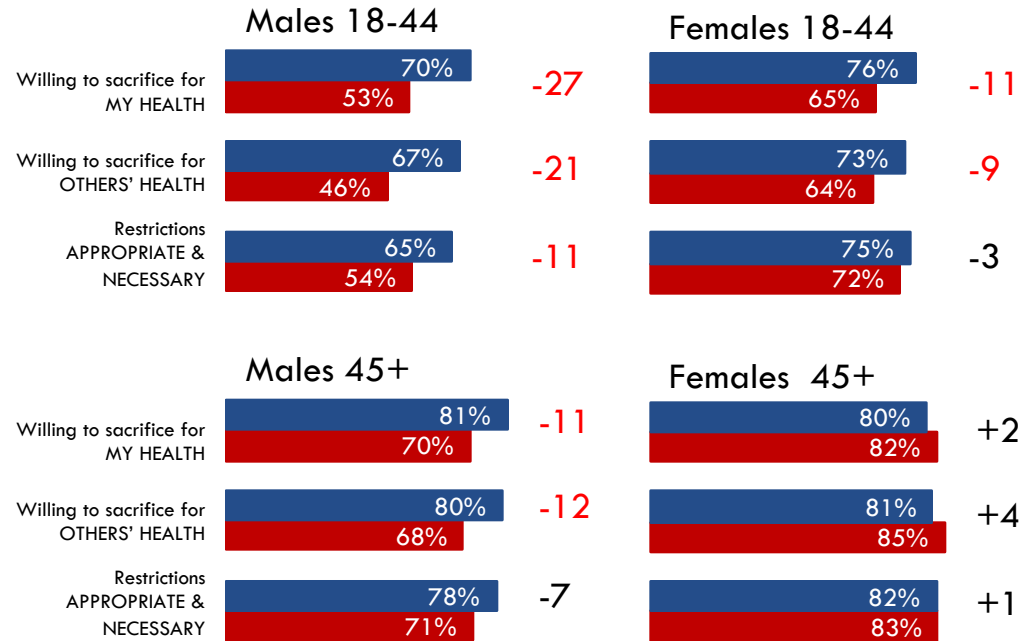


How much do you disagree or agree with each of the following statements?  
 0=Disagree Strongly, 10=Agree Strongly, or anywhere in between.

Among Total Sample

% Who agree (7-10)

- Women age 45 and older are the only group still very willing to make sacrifices for their own and others' health, while Men age 18-44 are the only group to be significantly less likely to think restrictions are appropriate and necessary.



■ 4/16 ■ 4/30

n= approx. 200 per segment, per day

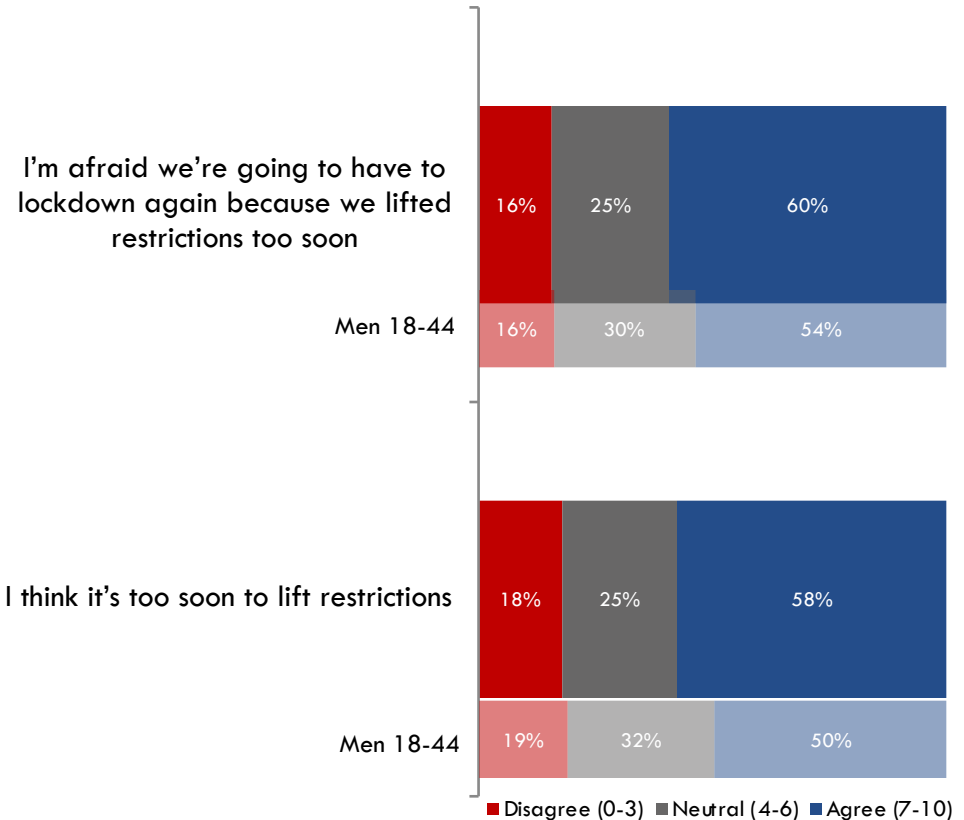
Differences of 8% are generally significant at the 90% confidence level.





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

Among April 30 Total Sample



- And, while attitudes are certainly shifting, more than 80% of consumers agree at least somewhat that it's still too soon to lift restrictions.
- In this case, young men's opinions tend to align with the rest of the sample, underscoring the uncertainty of these times for everyone – these consumers don't like the restrictions, but generally they're not sure these should actually be lifted yet.

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

# What's the impact on consumer emotions?

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Continuing our tracking of consumer priorities and sentiment

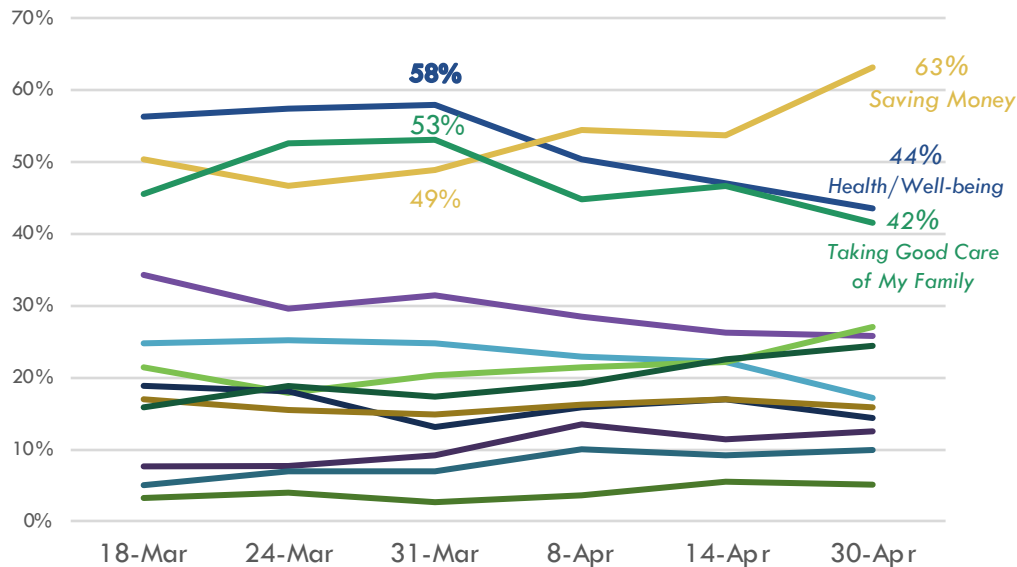




## Core Motivations

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* rising in importance, while *Health/Well-being*, and *Taking Good Care of My Family* decline.

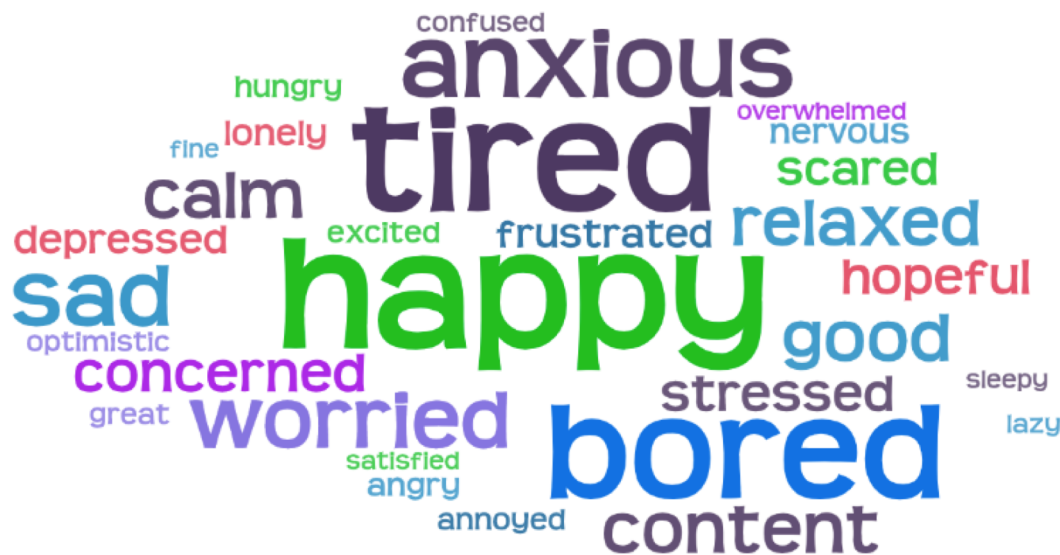
- This reinforces the need for companies to focus on justifying their Value proposition in this environment.

### Other observations:

- The need to *reduce stress* is on the decline, and consumers are beginning to demand that products *satisfy* again.

- We have seen relatively little variation in the words used to describe emotions over the past 6 weeks – *Happy* is consistently the most frequent, followed by *anxious*, *tired*, and *bored*.
- Note: This question is asked in general, before the COVID topic is even introduced.

*What 3 words would you use to describe the emotions you're feeling today?*



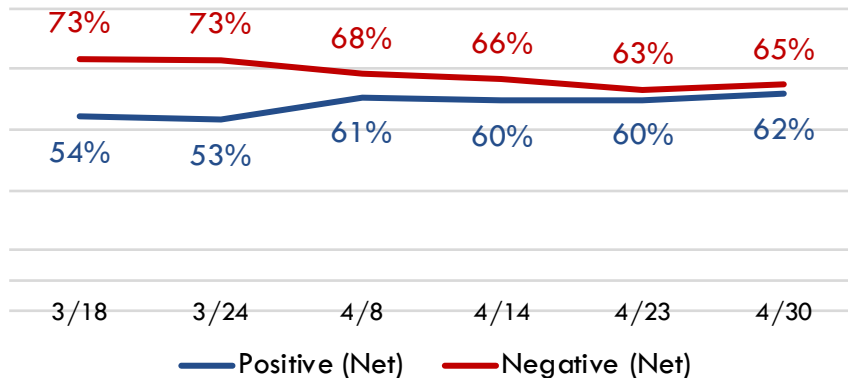


• **Looked at as a whole, we're seeing more negative than positive emotions, with positives trending up, and negative feelings are on the decline.**

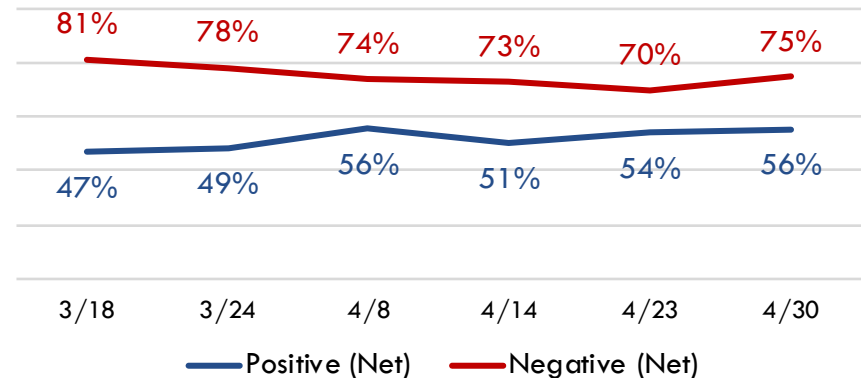
- We think that many are trying to find spots of joy wherever they can find them, and that negative emotions for many are declining as the shock wears off.
- Yet if you've lost income during the crisis, negative feelings are higher and have started to grow again.
- As this crisis wears on, there are a number of potential reasons for negative feelings to swing back up:
  - Re-opening economies too soon leads to another increase in infections.
  - Continued economic uncertainty/difficulty finding employment, even as some businesses open back up.
  - Political/social discord – in verbatims, we're seeing irritation with shutdowns that are perceived to be unnecessary, alongside frustration with neighbors who refuse to comply.

*What 3 words would you use to describe the emotions you're feeling today?*

**Total Sample**



**Have Lost Income**



Continued tracking of individual top words still available upon request.

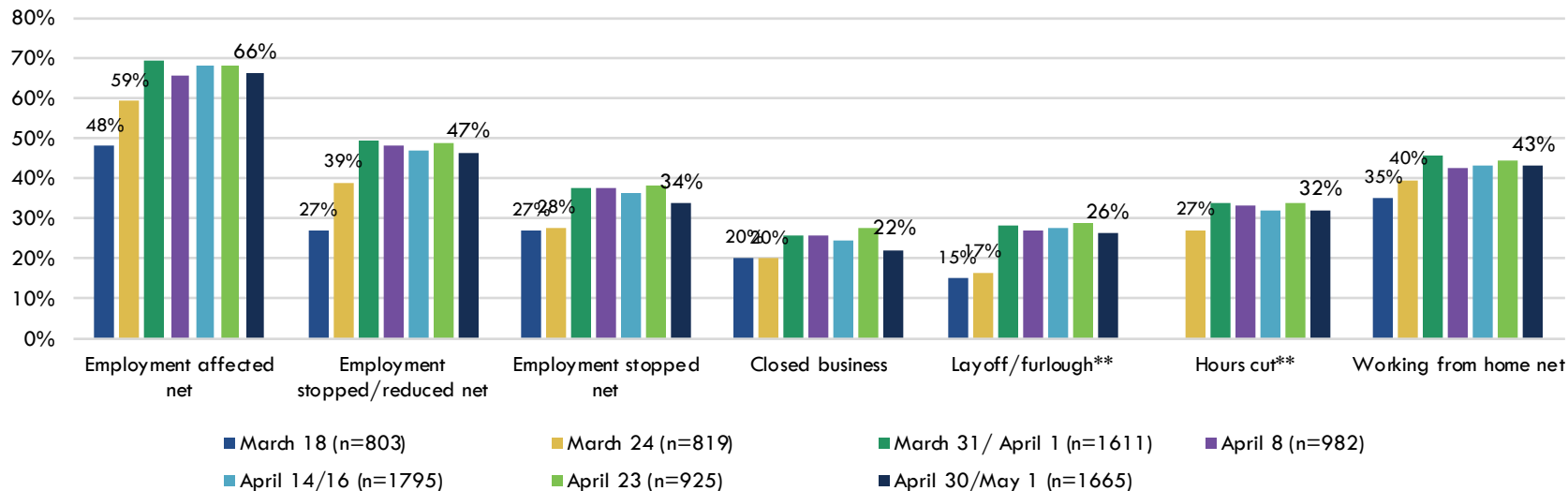
# How are economic changes influencing consumers?

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Unemployment numbers never tell the whole story.



- While unemployment claims are still catching up, the number of employees impacted by the shutdown 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.



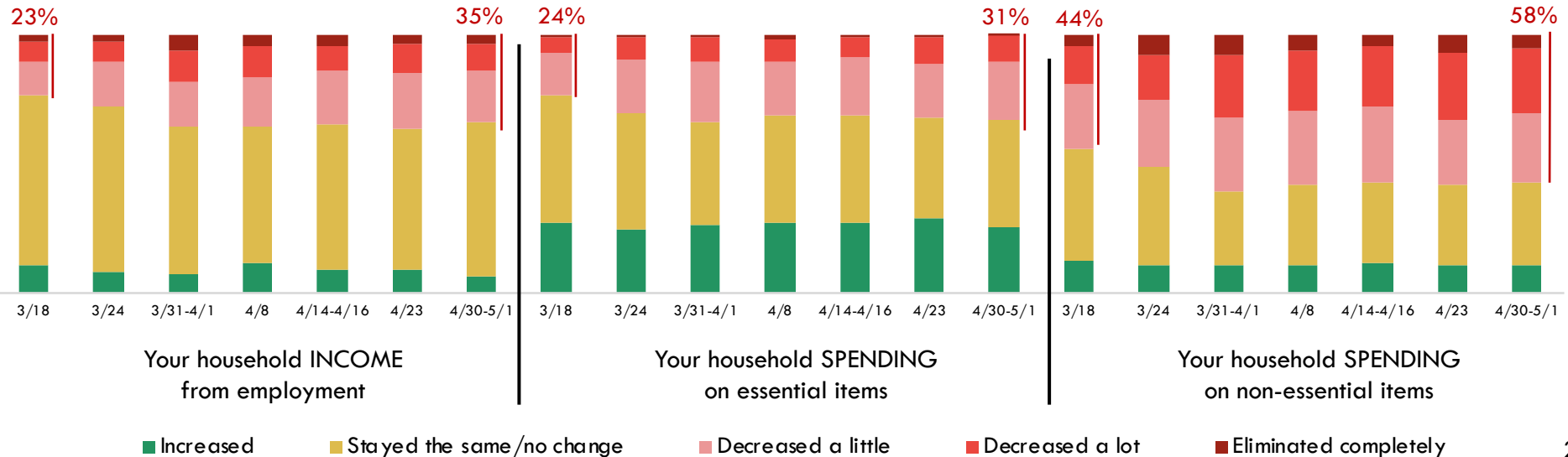
\*\*Furlough added on 3/31 \*\*Hours cut added on 3/24

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.

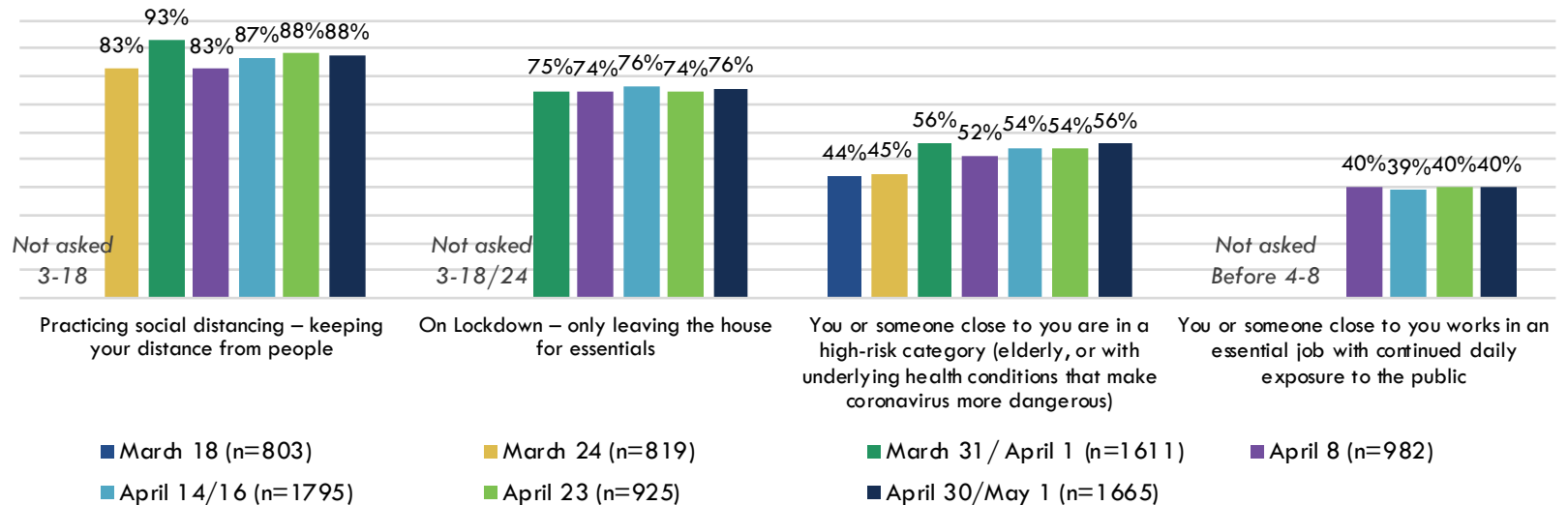
*How much, if at all, has each of the following CHANGED since before recent events?*





- **The number of consumers practicing social distancing is now holding steady at about 88%.**
  - 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 4% are generally at the 90% confidence level.

## • 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>



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

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HEALTH, SAFETY,  
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