

COVID-19 CONSUMER RESEARCH EXECUTIVE SUMMARIES

April 22, 2020



| | |
|--|----------------|
| WAVE 7: CONDUCTED APRIL 18 - 20 | 4 - 12 |
| WAVE 6: CONDUCTED APRIL 11 - 13 | 13 - 21 |
| WAVE 5: CONDUCTED APRIL 3 - 5 | 22 - 29 |
| WAVE 4: CONDUCTED MARCH 28 – 30 | 30 - 38 |
| WAVE 3: CONDUCTED MARCH 21 – 23 | 39 - 49 |
| WAVE 2: CONDUCTED MARCH 14 – 15 | 50 - 57 |
| WAVE 1: CONDUCTED MARCH 5 – 9 | 58 - 65 |

MDC and **The Harris Poll** have partnered to conduct research regarding the impact of the **COVID-19** pandemic on the American consumer. The executive summaries on the pages that follow provide insight into current consumer attitudes and behavior and can be used to help navigate the next several weeks.

The research is organized in descending order from most recently conducted (April 18 - 20) and is divided by week for clarity and to demonstrate how perceptions are shifting as COVID-19 developments evolve.

We hope this information proves useful to you and your team as you pivot in real time. We are sending our very best wishes to you during this time.

As always, we are here to help. Please don't hesitate to contact us with any questions you may have.

Positively,

Ryan

WAVE 7

WAVE 7 INTRODUCTION

The following research was conducted between **April 18-20, 2020** by The Harris Poll on the coronavirus outbreak. Fielded among a nationally representative sample of **2,029** U.S adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

AMERICA STAYS PATIENT

Introduction:

Americans are siding with governors in saying their state's social distancing restrictions are **striking the right balance** with just more than 1 in 10 saying they are **too restrictive**. And there is strong support across the political divide to keep them in place for now:

- 7 in 10 Americans (69%) say their state is striking the right balance while 17% say they are not restrictive enough and only 14% too restrictive.
- Strong majorities of Republicans (70%), Democrats (68%), and Independents (68%) say states have the right balance of restrictions.
- In [our polling featured on NBC News](#), over two-thirds of voters (67%) said they **expect it to be at least a month** before Americans should start returning to work and life as normal.
- Meanwhile, financial stress is building for nearly 9 in 10 Americans as we [discussed with CNBC](#), and the [Harvard CAPS /Harris Poll](#) found that **economy and jobs** is now the second most important issue (41% of voters) after the management of the coronavirus crisis (63%).

Implication:

Americans are optimistic about overcoming the virus and getting back to normal which is why they back the current lockdown in overwhelming numbers despite the growing economic pain. Go short on the economy but long on American resilience.

Section:

02

Topic:

EVERY BUSINESS IS NOW LIKE A HOSPITAL

Introduction:

No one single action will make Americans feel safer to fly on a plane, return to work, attend a sporting or large venue event, or eat out at a restaurant. But in a new **Harris Poll business playbook for reopening** there are tactics consumers say will make them feel more welcome and at ease:

- **Eat alone together:** three-fourths (74%) of Americans **miss dining at a restaurant/bar** and patrons want back in but (62%) want restaurants configured for social distancing, and (56%) want maximum capacity limits to ensure 6-feet between diners.
- **Practice haute hygiene:** [according to Eater](#), “You may be having dinner with a waiter wearing gloves...maybe a face mask, a dinner where the menu is disposable, where half of the tables in that restaurant no longer appear, where your temperature is checked before you walk into the establishment.” In fact, our poll found 45% of Americans want **temperature tests for restaurant staff** and even a quarter want a **no-beard policy for waiters and kitchen staff** (22%).
- **No more open floor plans:** in order to feel safe **returning to work** 61% want policies requiring employees to stay home if they feel sick, 48% say no meetings larger than 10 people and 47% say desks should be spaced 6-feet apart.

Implication:

Farm to table thinking now applies to hygiene: every company's cleanliness must be 'transparent and sourceable.' Expect consumers and employees to make demands on businesses which seem prudent to the former and excessive to the latter. And each must manage the tension in customer wants with conflicts in privacy, margins and worker rights.

Section:

03

Topic:

WE'RE ALL IN THIS TOGETHER... BUT ARE WE?

Introduction:

While the pandemic has led to countless numbers of uplifting stories, the story of **Asian Americans being blamed for COVID-19** is not one of them.

- **An Unacknowledged Problem:** while the [FBI has warned of potential surge in hate crimes against Asian Americans amid coronavirus](#), less than half of the public (45%) feel hate/discrimination has risen towards Asian Americans since the COVID-19 outbreak.
- **Lack of Concern:** even more worrisome, **41% say they are not at all or not very concerned** about this growing problem in our country as [Asian Americans grapple with feeling like a person of suspicion in their own community](#) and [slurs they never expected](#).
- **Behind the story:** our [poll shows](#) Americans report bi-partisan distrust of Chinese Government and support The President's tariffs, while 77% blame China for the virus.
- **What does this mean?** We need collaborative action to fight this. The CDC and DOJ worked to stop bias incidents and hate crimes following the SARS outbreak and the 9/11 terrorist attack but [The Center for Public Integrity and NBC report](#) that Federal Agencies have no plan in place to address anti-Asian hate during C-19.

Implication:

With this new division and tension in communities monitor the pulse with your Diversity & Inclusion and Multicultural efforts.

Section:

04

Topic:

ALL HAIL VOTE BY MAIL

Introduction:

Who wants to stand in line at the ballot box in November? Not many it seems. Voting-by-mail has **broad and popular support** for the upcoming election: nearly three-fourths of Americans (73%), and a strong majority of both parties, approve of vote-by-mail in November's presidential election.

- **TechCrunch** says *vote-by-mail should be having its moment. Will it?* Among those who disapprove of vote-by-mail (27%), 78% say it is in fear of **voter fraud**, 57% say issues with counting votes, 57% say voting should be done in person and 56% are concerned with security.
- **We wonder:** couldn't the Census takers be mobilized to help ensure analog/mail voting?
- **Local outreach matters too:** in [Austin, buses equipped with wifi](#) are rolling out to neighborhoods with limited online access (see ingenious ways governments are [enforcing social distancing](#) around the world including "keep the distance of one alligator" in Florida).

Implication:

That three quarters of Americans are concerned with going to the polls five months from now gives an indication of trepidation of public places, portending a 'Cruel Summer' at least as far as mass gatherings go.

Section:

05

Topic:

WILL SPORTS RETURN AT ALL?

Introduction:

As fans hope for some return of an NBA playoff, Stanley Cup and the start of MLB, Americans are unsure that sports will go on: one-third (34%) say sports leagues should **cancel this season** and wait until next season to resume, but there are other competing opinions:

- Supporting [Dr. Fauci's plan](#), 4 in 10 say they should either **play the season without fans** (21%) or **restart the current season now and phase fans in later** (20%). Only 15% say they should restart the current season only when fans can attend.
- While more than 4 in 10 (45%) say they **miss watching sports on TV** and half (49%) miss attending sporting events in person, one-fifth of Americans (21%) say there is **nothing that would make them feel safe** to attend a sporting event again. [In our polling for USA TODAY](#), only 6% said they would go to a game as soon as allowed.
- **What's replacing sports?** [As we told The NY Post](#), lots and lots of new streaming. The NYT has a game plan for [what has to happen first](#) for sports to come back. Meanwhile F1 to The Premiere League are [turning to e-sports](#) and giving players devices instead of cars and soccer balls.
- **Our Athlete of The Week:** this [99 year old UK vet](#) raises over \$33 million for the NHS

Implication:

Americans are coming to grips about managing their expectations about hot dogs and a seventh-inning stretch. Meanwhile [re-runs of historic sporting](#) events like The Masters and NBA Finals are reaching record audiences. Sports programmer and historian might be a new post C-19 occupation.

Section:

06

Topic:

BIG TECH AND PHARMA TO THE RESCUE

Introduction:

Sometimes it takes a crisis to turn a black hat, white: a large majority (81%) of Americans **approve of large tech companies** helping to trace coronavirus cases they may have been exposed to.

- **What a difference a pandemic makes:** In our [Axios-Harris Poll 100](#) 2019 Corporate Reputation Rankings, **some tech reputation rankings were battered** while others are rising in American esteem: Samsung was ranked #7, Microsoft #9, and Sony #10.
- According to [The Verge](#): Apple and Google are building a coronavirus tracking system for tracking the spread of the new coronavirus, allowing users to share data through Bluetooth and approved apps from health organizations.
- **Even tech as an industry is rising during C-19:** 38% say their view of the industry has become more positive since the start of the outbreak, and 40% of Americans say the tech industry should provide solutions during the outbreak.

- And the **pharmaceutical industry** also stands to play a big role: as [Fortune](#) notes, “as much as the pandemic has devastated many industries, it has offered Big Pharma a chance to shine as never before, winning back the trust of a public infuriated with years of soaring drug prices. Will they seize the moment? Without a safe and widely disseminated vaccine to confer immunity on a huge swath of the population, it’s hard to imagine life returning to something resembling ‘normal.’” In our tracking, over half (55%) say pharma should be providing solutions during the outbreak, and 4 in 10 (37%) say their view has become more positive.

Implication:

American compliance to share their data is a boon to public health and re-opening the economy safely. Once testing scales, information sharing will be crucial and watch for tech to be a big part of the solution in socializing ‘safe spots’ for consumerism and other economic and social activities.

Section:

07

Topic:

CURIOUSLY, AMERICANS SPURN LESSONS LEARNED

Introduction:

We spent this whole newsletter telling you how prudent and careful Americans are being...and then there's this: Despite the decrease in American's fear of dying from COVID-19 (44%, down from 56% last week) Americans are **not thinking about proper precautions** against the flu next season.

- **Herd Immunity?** While 62% said a C-19 vaccine would be necessary to resume normal activities like flying, going to the gym, sporting events, etc., (57% to return to work), less than half (44%) say they are **very likely** to get a COVID-19 vaccination as soon as it becomes available.
- Only 53% of Americans say they received their **flu shot** during the 2019-2020 season and only 57% plan to get their flu shot for the upcoming 2020-2021 season. That's only a four point uptick in concern, supporting assertions in an [excellent FT essay](#) that humans are poor at assessing risk.
- For an in-depth read of quantifiable human folly, see HBR [Predictable Surprises: The Disasters You Should Have Seen Coming](#).

Implication:

Americans feel the distant future is of no concern, or irrational optimism in our DNA is winning out over common sense. Either way, the good thing is according to our data we're listening to science and trusting the CDC more than The White House. There's still time to get that flu shot!



WAVE 6

WAVE 6 INTRODUCTION

The following research was conducted between **April 11-13, 2020** by The Harris Poll on the coronavirus outbreak. Fielded among a nationally representative sample of **2,013** U.S adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

THE THRESHOLD TO NORMALCY

Introduction:

This is supposed to be the week where we'll see the curve flatten. Yet for most Americans, **it will take a vaccine** to make them comfortable:

- 62% say a vaccine would be necessary to resume normal activities like flying, going to the gym, attending sporting events, etc.
- Barring that, 53% say extreme cleaning of facilities; 48% C-19 testing given to everyone; 37% mandatory masks for workers and patrons; 35% mandatory spacing out of seating; 34% occupancy limits; 25% thermal testing.
- In our [WSJ survey on privacy](#), Americans overwhelmingly support mandatory screenings, location data sharing and patient registries.
- Also, Americans caution against easing off restrictions too soon: more than 8 in 10 (84%) are concerned this will cause a surge in coronavirus cases while nearly three quarters (74%) say the number of cases should have to decline before Americans can return to work; (67%) say proper testing must be in place prior to easing off restrictions.
- Yet [as we told Politico](#), 51% of Americans say we should stay away from work for another month; but 34% are claustrophobic at home.

Implication:

Just as after 9/11, Americans will need to feel safe doing “normal” activities again. Expect growing impatience to speed up normalization. But it's clear we are rethinking what is normal moving forward, and maybe that is a good thing.

Section:

02

Topic:

WHAT DOES A NEAR-NORMAL LOOK LIKE?

Introduction:

We expect public PPE, social distancing enforceable by law and mobile tracking to go mainstream as states look to slowly reopen the economy:

- Nearly 7 in 10 (67%) Americans say people should be mandated to wear masks if they go out in public; and 64% say those who don't comply should face fines, if masks are mandated.
- Roughly the same number (72%) think businesses should have the right to refuse service if a customer is not wearing a face mask.
- And Americans support fining people who disobey social distancing restrictions, such as (65%) going to a public area that is closed (e.g., parks, beaches); 64% congregating with more than 10 people.
- 9 in 10 Americans **consider distancing compliance a 'patriotic duty'**.

Implication:

As anxiety gives way to economics, in absence of testing, social distancing is the only defense Americans have to move forward. This means if you're a restaurant, you need to [rethink your space](#). If you're a Hollywood studio you [need to rethink your sets and production](#). Everything must be done to assure customer and employee health. This is the new value exchange in business.

Section:

03

Topic:

EVERYONE HAS A SUPPLY CHAIN PROBLEM

Introduction:

You've read that [farmers are dumping their crops](#), even while lines at food banks grow. Well, new sourcing challenges are hitting every corner of the economy. Case in point: [Our Wall Street Journal Harris Poll](#) found that Americans are **loading up on streaming services**. Let's take a look at this industry in depth:

- Parents with children at home are spending \$60 a month for streaming subscriptions — well above the general population — and have 3.8 services vs. 1.7 for households without children; 30% bought a new Netflix subscription in March (49% with children vs. 18% without).
- And 56% of Americans are watching 2 to 4 more hours daily. A fifth of homes with kids are watching more than four additional hours of streaming content per day.
- Hollywood has a looming content supply chain problem: as movie theatres, sports and theme parks are shut down, streaming will draw down inventory and if there are no new originals, subscribers will deplete each service, creating a share war.
- Services with deep libraries of older programming like Disney+ and Amazon Prime will be on stronger footing.

- Animation is king: animators can work from home; actors can do v/o remotely, too.
- Studios will avoid bidding wars for hot titles, choosing more small scale fast/easy to produce programs instead; sets will need to become more agile, smaller and re-thought to navigate future shutdowns.

Implication:

You need to war-game your business from every angle and redeploy investments for at least two phases: pre and post vaccine.

Section:

04

Topic:

LIFE IN QUARANTINE: VICES AND GRATITUDE

Introduction:

As [we told the NY Post](#), life in quarantine means every day is kind of like Super Bowl Sunday: about 40% of people say they've been **eating more snack foods** since the outbreak began with 26% admitting they're finding comfort in chocolate; 25% drinking more soda and 20% consuming more alcohol (millennials/Gen-Z 30%).

- With restaurants closed and grocery delivery supply chains slowed, a quarter of Gen Z/Millennials (26%) and a fifth of men (20%) are pivoting towards fast food vs. 17% of the general population.
- Yet it's not all bad: two-thirds of Americans are taking extra time to **make more home cooked meals** (68%), especially adults ages 35-49, and to **eat more fresh food** (42%), especially adults 18-34 and higher income households.
- Half of parents are giving in to **more screen time** (50%), treats (39%) and buying more toys (30%) to preoccupy their kids... and half of the workforce is working in their PJs (49%) and feeling more productive (53%) now than at the office.

Implication:

As tensions rise with nowhere to go, a little indulgence is en vogue as a means of emotional reassurance; companies and marketers should think how they can help the public find the balance they so desperately need.

Section:

05

Topic:

THINK LIKE A CRASH TEST DUMMY...

Introduction:

Preparing for life PC-19, (post COVID-19) Americans are **coming to terms with saying goodbye** to some of the things they miss the most about life before and replacing foundational parts of the American lifestyle with virtual, live streamed, in-home (aka safe) alternatives.

- 67% of Americans are now more likely to have a virtual happy hour with friends vs. going to a bar (33%).
- Even though 46% miss attending sporting events, nearly three quarters (73%) are more likely to live stream sports at home vs. attending sporting events live in person (27%).
- While nearly 4 in 10 miss going to the gym/work out class (37%), a whopping 85% are more likely to exercise at home vs. going back to their local gym (15%).
- Nearly 8 in 10 (79%) are more likely to watch a movie at home vs. going to the movies (21%) even though more than 4 in 10 miss going to the movie theatre (44%).
- But there are some aspects of life pre-COVID that the public wants to resume in person such as in-person doctor appointments (64%) over virtual (36%) and shopping in store for groceries (73%) vs. ordering home delivery (27%).

Implication:

Americans are adaptive and agile, and some new habits will take root out of the crisis. But Americans are also social creatures who are growing weary of being homebodies. The businesses that will win must provide high quality/safe passage. In that way, every company and marketer needs to think like an insurance company. Trust now means peace of mind.

Section:

06

Topic:

AMERICANS TURN FOCUS TO SAVING LOCAL ECONOMIES

Introduction:

As **local leadership rises in trust** over the Federal Government (78% vs 54%), Americans are also looking to revitalize their local economy. New data shows they are more favorable and forgiving towards small businesses and brick and mortars that are struggling the most.

- More than 2 in 5 Americans have a **more positive view of small businesses** (45%) and restaurants (41%) since the start of the coronavirus pandemic.
- **Forgiving Businesses Who Can't Pay Rent:** 76% say retailers should be allowed to postpone rent payments if they cannot afford it due to the coronavirus, even if they remain open for business.
- **Favoring Local Manufacturing:** 82% say their opinion of a company would improve if the company promises to relocate their manufacturing away from China and back to the United States.

- Small businesses tell the Harris Poll they are struggling, but 67% of small business owners feel a responsibility to their community and 60% of small business owners feel supported by their community. Read our [special C-19 small business report](#).

Implication:

Americans are turning their attention to their communities, meaning companies and marketers that work to support local economies will prosper and also be forgiven for hardships: in fact it might even work in your favor, 55% say their opinion would improve of companies harmed by the crisis asking for a bailout from the federal government.

Section:

07

Topic:

TAXPAYERS TO UNCLE SAM: SHOW ME THE MONEY!

Introduction:

As we spoke with USA Today, almost nine in ten Americans (88%) are aware that the deadline to file taxes has been extended due to COVID-19, nearly 3 in 5 Americans (57%) say they **will not be taking advantage of the later filing**. One can surmise that most Americans are expecting a refund and right now, cash flow is on par with Purell. In a crisis, cash is king:

- More than half of Americans (55%) are concerned that they **may lose their job** due to the coronavirus outbreak. Nearly 2 in 5 (41%) think their **income will be lower** in 2020.
- While a strong majority (61%) say they could live off their savings for 1-6 months, 40% could only live off of their savings for up to 3 months (13% could only live off of their savings for 1 month; 13% for 2 months; 14% for 3 months)
- More Americans think the **economic impact will have a bigger impact** on them vs. the virus itself (65% vs 35%).
- And while (53%) say they are not withdrawing from their 401k early because of new rules/COVID-19, 38% are seeking out **additional sources of income**.

Implication:

Cash-strapped Americans will be cautious investors, savvy deal-seekers and more inventive and attentive in managing their household budgets. Financing plans, discounting and compassionate brand messaging will separate the opportunists from those who build long term affinity as consumers struggle to get back on their feet.



WAVE 5

WAVE 5 INTRODUCTION

The following research was conducted between **April 3-5, 2020** by The Harris Poll on the coronavirus outbreak. Fielded among a nationally representative sample of **1,993** U.S adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

THERE ARE TWO CURVES AMERICANS NOW CARE ABOUT

Introduction:

As we enter into a possible 'peak week' in New York, perhaps it's wrong to think about mitigation as a tradeoff between human health and the economy. As they told us, Americans' livelihoods are now also at risk amid the shutdown and this is becoming a matter of public health. Americans are struggling to pay bills: Over a quarter (27%) have missed (or will soon miss) a bill payment and ages 18-49 are more likely than those 50+ (37% vs. 16%). Especially hard hit are young people. In our interview [for Kaiser Health and VICE](#), our data shows that 31% of 18 to 34 had either been laid off or put on temporary leave, compared with 22% of those 35 to 49 and 15% 50 to 64.

The domino effect moves into American homes where nearly a fifth (19%) say they have missed (or will soon miss) a rent/mortgage payment, especially men (23% vs. 17% women) and 18-49 (27% vs. 10% 50+). As a result, 60% say they can only survive for 1-6 months on their savings and 11% can't live on their savings at all. Four in five Americans (42%) have lost income partially and a fifth (19%) entirely. Americans 18-49 are more likely than 50+ to have lost income partially (51% vs. 31%) and entirely (26% vs. 11%).

Understandably then, over a quarter of Americans (27%) have accumulated more debt than normal and cut back on savings, especially men (31% vs. 23% women) and younger adults (48% of 18-34 vs. 29% of 50+) and a third of Americans (33%) have stopped or cut back on retirement savings, while nearly 2 in 5 Americans (38%) have stopped or cut back on other savings. Nearly half of Americans (43%) think their income will be lower than it was in 2019, notably 18-49 (51% vs. 34% 50+) and \$50k-\$75k HH's (51% vs. 39% of <\$50k HHI).

Amid this pressure, how are we getting by? This week [we lost Bill Withers](#), whose song 'Lean on Me' has been a cultural rallying cry. And indeed, Americans are leaning on family and friends for a financial lifeline; nearly 3 in 10 (28%) have provided financial support for a family member, especially 18-49 (35% vs. 20% 50+). Around a fifth of Americans (19%) have provided financial support for a friend.

Fortunately, we are also summoning our resourcefulness. Indeed, 'Pivot' may become Merriam Webster's word of the year: Around 2 in 5 Americans (38%) have sought out new or additional sources of income. Men are more apt to state this (44% vs. 32% women) as well as ages 18-49 (51% vs. 22% 50+).

Implication:

Many economists say this is a public health decision first and the economics will follow. But the more we suppress the spread by suppressing the economy, the harder the toll on American livelihoods and survival. Flattening the economic curve is a key priority to stemming the anxiety and stress that's growing in discussions across American kitchen tables throughout the nation.

Section:

02

Topic:

TAKING STOCK OF WHAT WE'VE GOT

Introduction:

While our emotions are laid bare, we as a nation are taking time to reflect, connect and to some extent, appreciate life interrupted: The majority of Americans (78%) have felt grateful to be around people they truly care about and more than three quarters (77%) have shown compassion (taking the time to check in with people they care about). Nearly half of Americans (49%) have felt grateful for the break from work to be at home with my family, especially Americans age 18-49 in their prime working years (60% vs. 36% 50+).

And while parents are juggling zoom calls and online education, they are also connecting with their kids: Around a third (31%) have experienced 'Mommy/Daddy' time out-walking away from kids to get a break since the stay-home orders have gone into effect; especially men (38% vs. 25% women) and parents with an annual household income of \$75k+ (36% vs. 25% of <\$50k HHI).

Unfortunately however, nearly half of Americans (49%) and 59% of Gen Z and Millennials have felt lonely and isolated and 40% are overwhelmed since the stay-home orders have gone into effect, a quarter are increasing use of wellness and meditation apps, especially younger adults who feel most alienated and parents who feel most stressed.

Implication:

As the pandemic becomes an unfortunate national routine, dislocation also means reflection. Can this time of crisis yield greater compassion and empathy in our relationships, our communities and into our national partisanship? Most pundits would say no, but social scientists point to defining life events like the Great Depression shaping core values. So how will Gen Z carry forward lessons from the pandemic into their ethos for living?

Section:

03

Topic:

WHAT WE MISS & HOW LIFE MIGHT CHANGE

Introduction:

Thanks in no small part to news and social media, 56% of Americans fear they could die from coronavirus (up from 27% on March 14) and 68% think the amount of fear is sensible given how serious the pandemic has become, a stark reversal from 3 weeks ago when 56% said the amount of fear is irrational and people were overreacting. At the same time, for many of us the walls are closing in: More than a third of Americans (35%) have felt claustrophobic since the stay-home orders have gone into effect; Americans ages 18-49 are more likely (42% vs. 26% of 50+) to feel this way.

And with uncertainty comes anxiety and frustration: 54% feel angry that they don't know when this will end, this is especially true for Gen Z/Millennials (66% vs 48% of 35+) who are predisposed to stress growing up amid uncertainty as seen in our [APA Stress in America Survey](#). Millennials and Gen Z are most likely to feel overwhelmed right now (52% vs 37% of all adults).

Disruption is also impacting our daily life and personal work habits: More Americans start their day by rolling out of bed and jumping on the computer (56%) while (49%) wear PJs/sweatpants while working from home supporting a trending meme that "We're not working from home. We are at home during a crisis, trying to work." Add to the fact that 50% admit to not taking a daily shower isn't an indication that Americans are becoming lazy, (56% are actually working more now that they are home), but that Americans are doing the best they can in an unprecedented time.

But we are looking ahead! When we asked, which do you think will have a bigger effect on the life of you and your family: COVID-19 itself, or the economic impact of the C-19 pandemic? —almost two-thirds of Americans (62%) feel the economic impact of the pandemic will have a bigger effect on their lives and that of their families than (38%) COVID-19 itself. Women are more concerned about the economic impact (65% vs 58% men), whereas men skew slightly more concerned about C-19 itself (42% vs. 35% women) as do lower income HH's (insurance coverage, access to critical care) and this, in turn, drives their concern to the economic impact.

Implication:

Expect economic fear to soon overpower the health fear in America. Companies and marketers need to be understanding and meet the post-trauma of the crisis with economic-driven incentives for their customers from extending payment terms, consolidating debt, and forms of outreach to help consumers bridge into a new and uncertain future.

Section:

04

Topic:

PENT UP DEMAND CONTINUES TO BUILD

Introduction:

We told you Americans were squeamish about getting back out there. When asked how long after the curve flattens it will be before they will dine out, four in 10 (43%) say they'll do it within 30 days; two-thirds (66%) within three months. One-fifth of Americans (21%) say they will stay in a hotel and 41% within three months and 60% within six months. Airlines don't reach majority tipping points until four to six months after the curve flattens and 57% of people say it will take a year or more before they will take a cruise.

Yet amid America's month of cabin fever, we are seeing desire emerge in between the cracks of fear. People do miss things, obviously. The top three things Americans miss most are: dining out at restaurants/bars (51%), gathering with friends and family (49%), and shopping in stores (39%). And women, specifically, miss restaurants/bars (55% vs. 47% men), gathering with friends and family (58% vs. 39% men) and shopping in stores (44% vs. 32% men).

This week we also asked Americans, "Once the pandemic is over and things return to normal, do you think each of the following areas of your life will be very different, somewhat different or mostly the same?" The majority of Americans feel family, work and eating will be the areas of life to stay the same, especially among middle-class families and Baby Boomers. Almost half of all seniors feel shopping habits will change, a significant difference. And travel/vacations look to be the area most impacted by change which tracks with other data in our survey (above).

But Americans feel social activity, shopping and travel are the categories to become somewhat different after the pandemic, especially younger women, which suggests possible further dislocation for traditional brick and mortar shopping models. Travel/vacations are again expected to change; Democrats seem more insistent of changes happening in their social lives and routines than Republicans.

Yet Americans expect travel/vacations, social activity, personal hygiene and shopping habits to change the most. Younger people and Gen X/young Boomers feel social activity will change especially. Eating habits is the category least likely to see profound changes in American consumption by their expectations. Overall in this data it's important to look at the opposites: e.g. 68% of Americans do not expect their travel/vacations to change dramatically.

That we see such stark levels of fear regarding C-19 in our other data and that we have not yet crested the pandemic suggest Americans might have pent up demand (e.g. revenge spending) that marketers might service once life returns to some normalcy. Americans also report being more voracious users this month of smartphones (60%), television (53%), streaming TV (50%), games (43%), books (35%), music apps (33%), food delivery (22%) and podcasts (18%).

Finally, Americans are also planning longer-term purchases. One in five (19%) say they are considering buying new household goods, furniture, or appliances; 16% buying a car, attending a concert or sporting event or buying gifts or other non-essential items for themselves or their friends and family.

And their answers to how they would prepare for something like this in the future are to keep more of their money in savings (59%) and stockpile nonperishable foods (33%); make improvements to their living situation (18%), purchase a gun (13%) and remodel their kitchen (9%). Men are more likely than women to go "Y2K" including re-thinking their homes (23% vs. 13%), purchasing a gun (17% vs. 8%) and remodeling their kitchen (14% vs. 5%).

Implication:

Think about American resiliency in your marketing strategy. There is likely a 'whiplash' effect about to happen as the first sign that things might return to some type of normalcy. Upper funnel activity might soon re-emerge, even in unlikely categories like travel and entertainment.

Section:

05

Topic:

WHAT A COMPANY DOES IS MORE IMPORTANT THAN WHAT IT SAYS

Introduction:

States across the nation are struggling to address the pandemic as it takes different shapes and forms across communities. Americans are applauding the likes of firms like Honeywell, GM and Ford that are making ventilators, masks and other PPE. More than 9 in 10 Americans have improved opinions of companies that donate money, supplies or employee's time to aid relief in communities (92%) and when a company shifts production to make equipment or supplies necessary to fight the pandemic (91%).

But desired corporate action extends past addressing the pandemic directly to encompass supporting consumers who are indirectly affected; 91% have improved opinions towards companies that allow customers to forgo payments for up to 6 months or offer lower interest rates or other programs.

This also extends to protecting employees: 84% have improved opinions of company executives who forgo salaries, bonuses or other compensation. In fact, 84% say large companies' top priority should be keeping its employees safe, even if it means that customers need to wait to get their products.

Today, corporate action is becoming a requirement to advertise around C-19: 36% say that Marketers should only advertise if they have taken action to address COVID-19 and the amount of Americans who felt companies that advertise about COVID-19 is "a good thing regardless of actions they have taken, because it shows they care," decreased from 41% last week to 38% this week. In fact, 26% think companies who advertise about C-19 are just doing it for publicity, most of them feel contrived/forced.

However, the industries who are taking action see their reputations improve and are also the most trusted sources of information regarding C-19. Public opinion of the healthcare industry has increased since the coronavirus outbreak to 62%, and doctors/nurses as well as medical journals, are the top two most trusted sources of information on the topic (93% and 87%, respectively).

And Big Pharma is becoming Good Pharma with its position to provide solutions: Nearly 2 in 5 Americans (39%) say their view of pharmaceutical industries have become more positive since the start of the coronavirus pandemic and 6 in 10 say the pharmaceutical industry is best suited to provide solutions. We also see this trend rising across technology. More than 4 in 10 say technology is best suited and should provide solutions (42%) and almost four in ten people (37%) now have a favorable view of big tech.

Implication:

Every corporate reputation will be redefined by the response to C-19. And as seen in pharma and tech, esteem can literally be remade by a leadership position. Don't be limited by the constraints of your industry, regulation, etc., to not re-think what you could mean to society at this moment. There may have never been a better time to "pivot". Everything is on the table. And remember, don't say it...DO IT!

Section:

06

Topic:

ZOOM PARENTING AND THE RISE OF PERMISSIBILITY

Introduction:

We all know about helicopter parents. But now in the 24/7 hybrid house-conference room-classroom, leniency is the new currency as at-home as parents try to preoccupy their kids during the workday to prevent zoom video bombs, which 35% of Americans have experienced. As half of parents (49%) have increased their use of virtual meeting sites, over a third (35%) say they have experienced kids making cameos on video or conference calls. Dads are more freaked out about this (43% vs. 29% of women), while Moms say to Dads, 'welcome to the show.' More than half of parents (54%) have been giving in to more screen time to preoccupy kids since the stay-home orders and more than 2 in 5 Americans (43%) have been relying on more treats/snacks to keep their kids happy (new data we'll release Friday in the Wall Street Journal shows that streaming services are the new toilet paper of the pandemic). Finally, nearly a third of parents (32%) have been buying more toys, books or games to preoccupy kids, especially stressed out Dads (39% vs. 25% women).

And with rising cabin fever and not a lot of space, parents with kids in the household are 2x more likely than adults with no kids to increase consumption of gaming and other in-home entertainment to keep their children busy (60% vs. 33% of adults with no kids in HH). More than half of Americans (54%) have felt cabin fever and more than a third (35%) have felt claustrophobic (unable to escape my home) since the stay-home orders have gone into effect.

To combat tight living quarters, 70% of parents have increased use of streaming services (vs. 42% of adults with no kids in the HH), 65% of parents have increased use of social media (vs. 40% of adults with no kids in the HH); 52% of parents have increased use of music apps (vs. 22% of adults with no kids in the HH) and 33% of parents have increased use of food delivery apps (vs. 16% of adults with no kids in the HH). Finally, 28% of parents have increased use of podcasts (vs. 12% of adults with no kids in the HH). Any diversion seems worth a try.

Lastly, online learning is easier than it sounds: Close to a third of parents (31%) are frustrated with online schooling systems. Dads are more likely than moms to be frustrated (37% vs. 27%) suggesting their understanding of the work/life balance and attention to home affairs is still lacking.

Implication:

Potential dislocation could be the new normal, meaning Americans will rethink their homes as bunker-goers. From remodeling to accommodate new at-home situational work/school/life living, to stocking up to avoid shortages, a number of COVID-19 preppers will emerge in consumers that could cause new runs on products or new categories not previously considered "essential."



WAVE 4

WAVE 4 INTRODUCTION

The following research was conducted between **March 28 - 30, 2020** by The Harris Poll on the coronavirus outbreak. Fielded among a nationally representative sample of **2,016** U.S adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

AMERICA WELCOMES STIMULUS

**America supports stimulus, but split on economic recovery;
personal checks to individuals and families**

Introduction:

As we move into our new normal where three in four Americans are on stay at home orders, approvals are strong for how the federal government (61%), local government (76%) and state government (75%) have handled coronavirus. As reported in our latest [Harvard-CAPS Harris Poll](#), The President's approval rating is rising at 48% and his favorability rating is now 43%; Governor Cuomo is at 45%. For more see [Mark Penn on Fox Business](#).

Of course, two trillion dollars seems like welcome relief: Americans overwhelmingly support the stimulus bill (85%) especially older adults who have been through a New Deal or two (91% of 65+ vs. 79% of 18-34). But Americans are split on whether it will shorten the time it takes for the U.S. economy to recover (yes: 51% vs. no: 49%).

Of course, the personal economy is what matters and nearly three quarters (72%) of Americans expect to receive money, which is highest among middle income HH's of \$50-\$75k (84%) vs. lower income HH's (less than \$50K) and

higher income HH's of \$75k+ (70% respectively). But counting on this to inject life (59%) plan to pay their bills with the economic relief, especially parents (65%) and those making under \$75K (63%).

As for whether it will be enough money, Americans are split. Of the up to \$1,200 for individuals and \$2,400 for families, almost half say this is not enough (46%); exactly equal to those who say it is just the right amount. But with the surge of 3.3 million jobless claims last week, a majority think the amount allocated for unemployment benefits (an additional \$600 per wk. for 4 mos.) is just right (56%) vs. not enough (29%) or too much (15%), while a refund for businesses that continue to pay idle workers (up to \$5,000 per employee) is just right (59%), not enough (30%) and too much (11%).

Americans are generally more satisfied with the \$150 billion for state and local governments with those saying just right (51%) vs. not enough (30%) or too much (19%). Also, Americans feel the \$500 billion in loans to struggling industries is just right (58%) vs. not enough (19%), but almost a quarter (23%) feel it is too much. And of the \$100 billion grant for hospitals, those saying "not enough" (43%) nearly match those who say "just right" (49%).

Finally, as the virus spreads to new hotspots like Detroit, Miami and New Orleans, two-thirds of Americans (67%) feel that states are being forced to compete against each other to acquire limited resources (Democrats 76% vs. Republicans 57%), yet only a slight majority (56%) say the hardest hit states with the most cases of C-19 should be first in line to get aid, while more than 4 in 10 (44%) say "The government stimulus package should be divided equally."

Implication:

Correlation vs. Causation - With the personal economy mattering most, marketers should evaluate which C-19 macroeconomic variables are impacting business and marketing initiatives. Take advantage of the data available in the Harris Report to uncover and understand which trends are impacting your consumers behavior.

Section:

02

Topic:

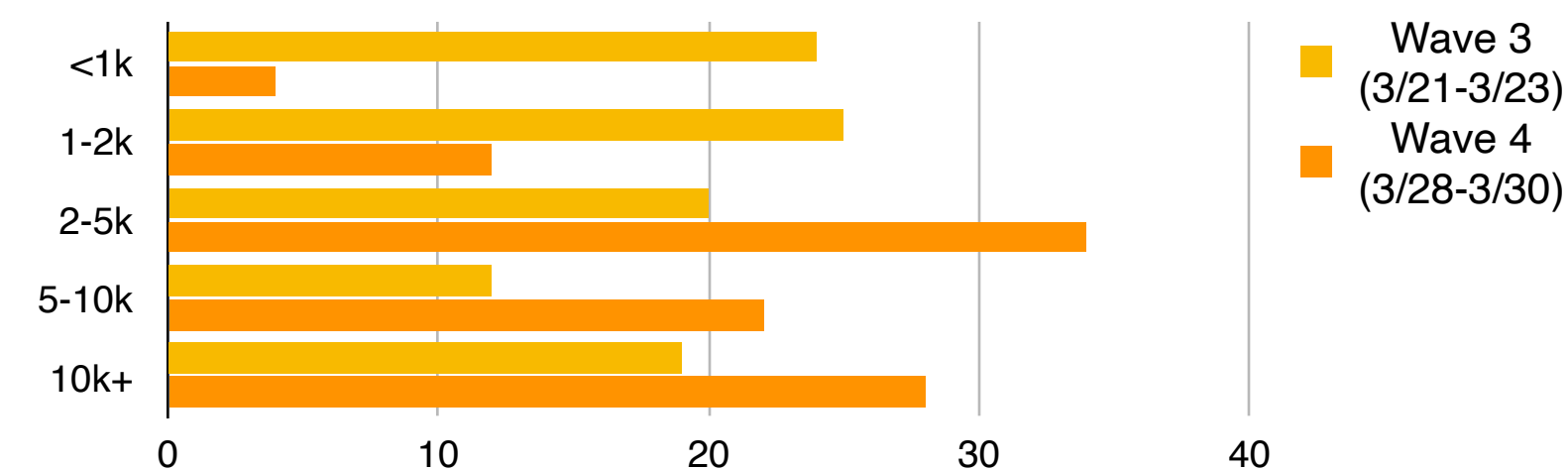
NO FLATTENING OF THE FEAR CURVE EITHER

Nearly 7 in 10 say “I think the amount of fear is sensible” (up from 46% on March 14)

Introduction:

This was the week C-19 became a clear, present and personal danger; the number of Americans who fear they could die increased 16 percentage points from March 14. Despite actual statistics, which have U.S. mortality odds at approximately under 1.4%, still 4 in 10 (43%) surveyed fear they could die, up from 27%. And while American concern and fear about C-19 is sky high, Americans are swiftly upping their predictions: last week the public expected less than 1,000 deaths (24%), but this week more than a third of Americans (34%) expect between 2,000 and 5,000 deaths.

How many Americans do you think will be lost to coronavirus?



And our national fear is extending to job security where just over half (56%) of Americans fear they will lose their job due to C-19, which is especially high among Gen Z/Millennials ages 18-34 (66%), as well as adults with children in the household (64%) and adults in lower income households (63% among HHI <\$50K). This suggests a ‘barbell’ effect where income may be bifurcated, but the fear is not.

Our data also shows that fears of global recession have become a reality signaling anxieties around income insecurity: over 8 in 10 Americans (84%) say we are already in a global recession right now due to the coronavirus and 4 in 10 think their income will be lower this year (39%). This is especially high among women (42%) who already face a gender pay gap.

As employees struggle to grapple with this new normal, employer action to support workers through new policies has become stagnant.

| Q14 What actions and/or policies has your employer instituted to address the coronavirus outbreak (COVID-19)? | W1 | W2 | W3 | W4 |
|---|-----|-----|-----|-----|
| Increased paid sick leave | 14% | 18% | 19% | 19% |
| Offered to cover out of pocket healthcare costs for preventative care (e.g., C19 testing, PCP visits, etc.) | 12% | 13% | 14% | 15% |
| Offered 3rd party services/resources to promote well-being and adjustment amid the outbreak | 10% | 14% | 14% | 14% |

Implication:

The fear of lasting impacts from C-19 is hitting all aspects of American livelihoods. While using emotional marketing to establish connections with your consumers, leading with fear may lead to unforeseen challenges. Explore how your brand or product(s) can help to overcome the “fear of the unknown,” as opposed to inciting it during this complicated time.

Section:

03

Topic:

AS IT TURNS OUT, PANDEMICS BEAT PRIVACY

Americans are willing to be tracked to help stop the spread of COVID-19; tech rep is rising

Introduction:

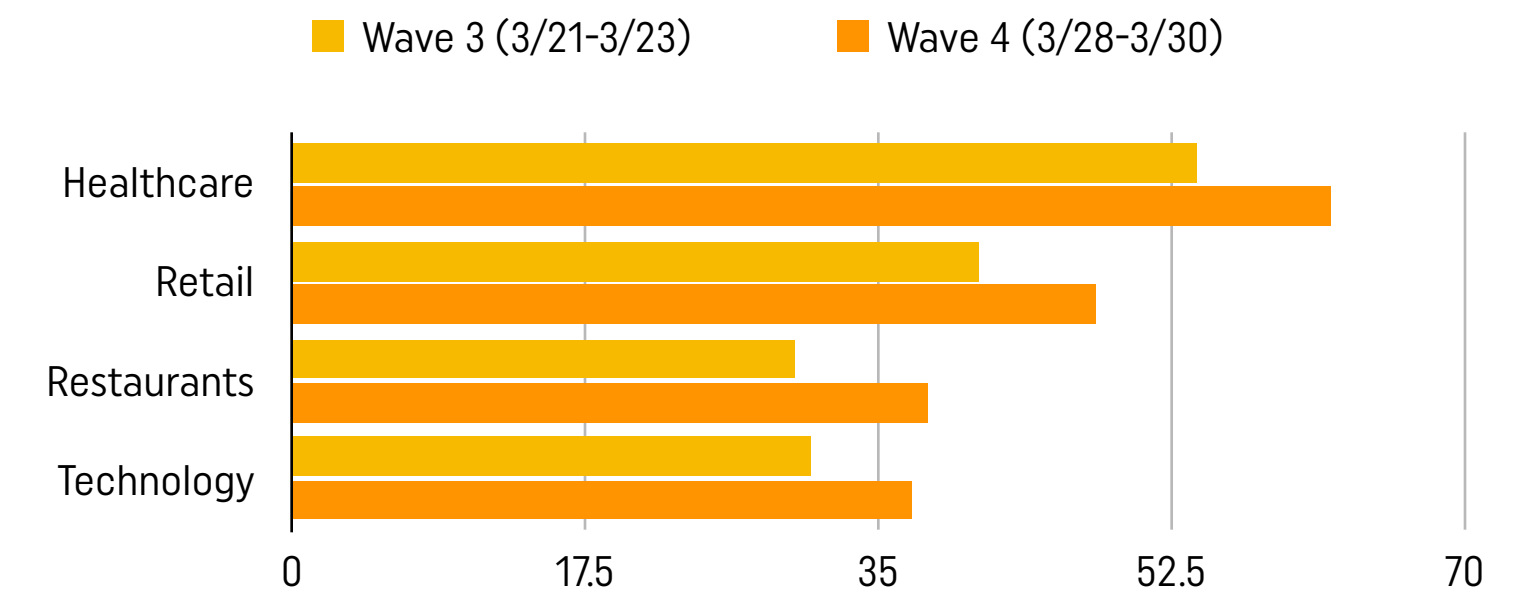
As new models are released from The White House showing the future aggressive course of the disease, Americans want policies to cease mobility and containment even at the expense of sacrificing their personal privacy. The majority of Americans (60%) would support government and public health officials having access to anonymous mobile location data so they can monitor which areas are practicing social distancing while (71%) would be willing to share their mobile data location so that they can be alerted if they were to enter an area that posed a health risk.

Furthermore, a strong majority of Americans (84%) would support a required health screening before someone could be allowed to enter certain crowded public spaces and (77%) in businesses like restaurants, offices and cinemas. Americans ages 35+ are more likely than Americans ages 18-34 to support required health screenings (86% vs. 78%), as well as parents but interestingly, across these questions largely both the left and right are united. Here the numbers really jump when the word 'government' is removed, suggesting that businesses are given a welcome invitation to protect the public health by

accessing people's data.

But perhaps the most interesting data point on privacy is how the reputation of the tech industry has risen during the pandemic. As you can see in this chart, almost four in ten people (37%) now have a favorable view of big tech, equal almost to that of restaurants and retail, and rose only two percentage points less than healthcare.

Feel More Positive Towards Industry Since Start of Coronavirus Pandemic



This is a stark reversal from our [Axios-Harris Poll study in 2019](#), which found that data privacy was the number one social issue Americans felt needed to be solved by business (69%) and approval of business in solving it was at 17%. The techlash has become the healthlash and we'll see if this goodwill lasts. Often, Americans are given to sacrifice in a crisis and at this moment a little data tracking seems to be in everyone's self-interest.

Implication:

With the major shifts on privacy concerns and tech reputations, marketing and technology teams should proactively discuss how their privacy strategies may shift both during and after C-19.

Section:

04

Topic:

SMALL BUSINESSES ARE UNDER SIEGE

Almost 40% of small businesses could be out of business within a month

Introduction:

We released a special Harris Poll Report on the state of [small businesses and C-19](#) today and the news is not good for a key engine in our economy: almost three quarters (71%) say revenue is down since the start of the pandemic; 28% say down by more than 50%.

And while 83% say they are confident their business can last two weeks under current conditions, those numbers drop to 75% in one month and 58% in three months. Also keep in mind that in our survey, half of all small businesses say that at least one other small business depends on them.

But with the President's extension of stay at home orders to April 30th, this means potentially 25% of American small businesses will be out of business; add potentially 50% to those who depend on them (13%) and that's more than one-third (38%) or 11 million American small business employing over 21 million Americans (*using data below); that's before you factor in the community impact, local commercial real estate, etc.

As you've seen appeals from our local businesses for help such as this idea from our neighborhood restaurant offering Frevo bonds (where diners buy \$100 bonds that cost only \$80 giving the restaurants cash flow now), two-thirds of small business owners (67%) feel responsibility to their community and (60%) feel supported by their community

our neighborhood restaurant offering Frevo bonds (where diners buy \$100 bonds that cost only \$80 giving the restaurants cash flow now), two-thirds of small business owners (67%) feel responsibility to their community and (60%) feel supported by their community

The stimulus will help, but a large swath of American small business is on precarious ground and likely the first casualty in an extended stay at home order. Here is a [pdf of the full report](#).

*There are 28.8 million small businesses in the United States, according to the U.S. Small Business Administration, and they have 56.8 million employees; and over 99% of America's 28.7 million firms are small businesses (JP Morgan).

Implication:

With the potential of 40% of small businesses going under in the next 30 days, marketers should examine the role small business play in both their business and marketing strategies. There will be unforeseen and radiating impacts.

Section:

05

Topic:

A LOOK OUT OF THE FOXHOLE TO 'REVENGE SPENDING'

It's not all bad; some green shoots in pent-up demand are appearing

Introduction:

The effects of national social distancing and stay home orders have decimated travel and hospitality. On March 28th, the TSA screened 184,027 passengers at U.S. airports, compared with over 2.17 million passengers screened on the same weekday one year earlier. But as the President extends social distancing to April 30, there is a potential hidden indicator of optimism, something we call '[The Ice Machine Index](#)', or the point at which hotel occupancy signals a flattening of the 'fear curve' and we intend to return to (somewhat) normal behaviors.

Americans predict it will take an average of 6.6 months for things to return back to normal, and as our Harris Poll shows in [USA Today](#), they are cautiously setting limits on when they will resume travel. But, we are starting to see pent-up demand growing during this lull, a quarter of all Americans (24%) are looking forward to traveling once things return to normal and business reopen.

And, as our Harris Poll shows in [Forbes](#), in the first month most of us (63%) are willing to resume routine activity like going into the office; then (43%) to restaurants and (69%) in three months. But interestingly, one fifth of Americans (21%) say they will stay in a hotel within a month and (44% combined) within three months. By six months, (65%) say they'll visit a hotel.

Within three months, the fear differential of eating out vs. staying in a hotel narrows. Second, getting to a hotel requires flying, rental cars, etc. Third, warmer months, coupled with leisure travel and 'revenge spending' to account for sacrifice and cabin fever could drive us back out there. And finally, extended shelter in place should only amplify these feelings when it's safe to leave home. Look, it's terrible on all counts. But watch hotel bookings to see when Americans think we're through the worst of the pandemic.

And as Americans look to the future, they're making a commitment to prepare by saving for another crisis; nearly 6 in 10 Americans (59%) say that once things return to normal and businesses reopen they would keep more money in savings to prepare for something like this in the future, and around a third of Americans (32%) would stockpile non-perishable foods.

Implication:

Future marketing plans should include strategies around pent-up demand, as well as for cycles of consumer volatility. Plans should take consumer demographics into consideration. Strategies will vary for millennials and baby boomers.

Section:

06

Topic:

CV19 MARKETING: DO MORE, SAY LESS

Americans show signs of corona ad fatigue; want to see actions not words

Introduction:

You can't turn on the television without seeing one, but opinions towards marketers who promote advertisements related to C-19 are mixed. While 4 in 10 (41%) say it's a good thing, a third (34%) say marketers should only advertise if they've taken action to address C-19, and a quarter of Americans say marketers are just doing it for publicity and most of them feel contrived/forced. Also consider the Pandora's box of further scrutiny if employees have been furloughed, lacking health insurance or protesting their 'essentialness' as [Instacart and Amazon](#) have seen. Calculate the risk/reward here because 44% of Americans say they rarely/sometimes engage with C-19 ads they see and 40% never engage at all.

Americans are, however, increasing consumption across all channels. In our survey (57%) are watching more broadcast TV; (56%) using their smartphone more (especially 70% of Gen Z/Millennials vs 34% of 65+) and (50%) are streaming more TV (67% of Gen Z/Millennials vs 26% of 65+) and a third (35%) are reading more books.

Young adults and parents have also increased their use of social media (60%), news apps (47% of Gen Z/Millennials and 50% of 35-49 vs. 41% of gen pop), virtual meetings (44% of Gen Z/Millennials vs. 26% 50-64 and 31% of all adults), music apps (53% of Gen Z/Millennials vs 34% of gen pop), gaming (56% of Gen Z/Millennials vs 41% of gen pop and 53% of parents/kids). Finally, 36% of parents report increased usage of wellness apps – more than double that of (19%) of adults without children. Try conducting a zoom call with three kids on your lap and you'll understand why this is happening.

Implication:

While consumers will return to most normal behaviors, marketers should plan around newly changed behaviors. There may have never been a better time for product innovation. Don't say it... do it!

Section:

07

Topic:

THE MODERN-DAY ROSIE RIVETER: AMERICANS AND PUBLIC ACCOUNTABILITY

Americans are doing more now than last week to support their communities

Introduction:

Much has been discussed about the role of civic responsibility and the overwhelming majority of Americans (90%) have taken steps to make sure they leave their residence as little as possible, up from 76% last week. In fact, 90% of Americans feel that the most patriotic thing we can do for our country right now is to make a national sacrifice to stay home for the welfare of others. Other measures Americans are willing take in order to help America through the coronavirus outbreak include 4 in 10 who would donate some of their stimulus economic relief to hospitals; 89% say they will stop hoarding items like toilet

paper and cleaning products, 88% say they will quarantine indoors and stop traveling domestically. Even 72% are willing to accept a rations program for certain goods.

This patriotism also goes local: just over half of Americans (51%) say they have checked in with someone they hadn't reached out to in a while, a 7-point increase since last week. Also, nearly one-third of Americans (31%) have purchased something from a small business as a sign of support, up from 26% last week. And overall, around a quarter of Americans have helped an at-risk friend or neighbor with errands (23%), a 4-point increase from last week.

How are we coping in week three? Virtual gatherings, daily walks and setting routine breaks are on the rise for activities Americans are using to cope with social distancing. Overall, around a quarter of Americans have had a "virtual gathering" with friends (27%), a 7-point increase from last week. Americans ages 18-34 are more likely than older Americans to have had a virtual "gathering" (40% vs. 29% 35-49; 20% 50-64; 14% 65+) and nearly half of Americans (47%) are virtually connecting with friends and family to cope with social distancing, an increase of 8 points.

And just over 2 in 5 Americans (41%) are going for daily walks to cope with social distancing - an increase of 5 percentage points since last week, while nearly a quarter of Americans (24%) are setting routine breaks in the workday - a 5-point increase since last week

Implication:

Americans are equating C-19 responsibility with patriotism and are "all in" to flatten the curve. Does your brand have a potential role to play in supporting local communities and/or patriotism?



WAVE 3

WAVE 3 INTRODUCTION

This research was conducted between **March 21 – 23** amongst American consumers as we continue to better understand their mindset and the impact these perceptions may have for brands. This study was fielded online among a nationally representative sample of **2,023** U.S. adults.

Section:

01

Topic:

THE FEAR IS JUSTIFIED

Introduction:

As the pandemic grows, concern is rising and Americans are more fearful and less likely to think the public is overreacting: more people think they're going to contract COVID-19 (20%, up from 16% to start). And now 35% fear they could perish from it. Perhaps this doom and gloom is a psychological reaction to a perfect storm of fear for one's self, loved ones, for livelihood and for seeing no light at the end of the tunnel (yet).

People are more accepting of the level of fear they see:

| | WK2 | WK3 | WK4 |
|--|-----|-----|-----|
| I think the amount of fear is sensible given how serious the pandemic has become | 46% | 50% | 61% |
| The amount of fear is irrational, people are overreacting | 54% | 50% | 39% |

People are increasingly concerned about...

| | WK2 | WK3 | WK4 |
|-------------------------------------|-----|-----|-----|
| Their personal health | 65% | 66% | 75% |
| Health of older friends / relatives | 86% | 87% | 90% |
| The health of Americans broadly | 79% | 82% | 87% |
| The American economy | 84% | 84% | 91% |

Implication:

People remember who rises to the challenge in a crisis. From CPG to Alcoholic Beverages, which industries, companies and brands will be the "Dr. Fauci?" As of this past weekend, Americans have a better view of healthcare (54%), grocery stores (41%), and even pharmaceutical companies (33%) and technology companies (33%); Industries seen as worse since the outbreak: media (33% say their view is "more negative"), travel/hospitality (29%), and airlines (29%). America needs your leadership, comfort and reassurance.

Section:

02

Topic:

HOW LONG BEFORE LIFE GETS BACK TO NORMAL?

Introduction:

Americans are eager to get back into the office! Americans (22%) say that once the government provides information that the spread of the virus is flattening, they would be willing to immediately go to the office. But it would take up to a month after restrictions are lifted would (28%) of Americans say they would go out to dinner or (17%) go to a gym class. It could take 2-3 months for Americans to attend large social gatherings (22%), go to the movies (21%), give a handshake (21%), stay in a hotel (20%), or go to a sporting event (17%). And 15% of Americans say it will take 2-3 months for them to be able to visit a casino or take public transportation (e.g., subway, busses, trains) again. Nearly a fifth of Americans (18%) say it would take them 4-6 months to fly again; 22% say it will take a year or longer before they take a cruise. Americans expect the social distancing guidelines **to last ten and a half weeks**.

Implication:

Marketers will have to rethink assumptions about the PTSD from C-19. On one hand, much of America was back to relative normal after 9/11. But this time feels different and unknown, at the same time. On one hand, a flattened curve means a longer pandemic, which is good for public health, but not for getting back to normal. Think about breaking your brand down into 'snackable' bits, e.g. fractionalized audiences at events; bespoke experiences and bringing the experience to the home or to small groups of friends and family. Look for tech companies to incorporate C-19 testing into smart watches, iPhones to automatically signal 'safe zones' for concerts or the corner market. Privacy concerns aside, the public might go for this.

| Activity | Avg time needed to return |
|--------------------------------------|---------------------------|
| Take a cruise | 1 year or longer |
| Fly on a plane | 4-6 months |
| Visit a casino | 4-6 months |
| Stay in a hotel | 4-6 months |
| Go to a sporting event | 4-6 months |
| Go to a gym class | 2-3 months |
| Go out to dinner | 2-3 months |
| Attend/Host a large social gathering | 2-3 months |
| Go to the movies | 2-3 months |
| Take public transit | 2-3 months |
| Greet people with a handshake | 2-3 months |
| Go to the office | 1-30 days |

Section:

03

Topic:

AMERICA EATS IN, BUT FORGETS TO SHELTER

Introduction:

Restaurant meals were toast as of last week, but the food delivery appears to now be slowing: Americans are more likely to order take out and pick up themselves (62%) over using food delivery apps (38%), but younger Americans are more likely to do both while older generations are much more likely to order takeout from a restaurant. Shelter in Place isn't an order that's being followed by Grandma and Grandpa: 82% of 65+ are picking up from restaurants.

Also, three quarters (73%) of Americans are more likely to buy groceries in person during the pandemic vs. order home delivery groceries (27%). And again, older Americans are the least likely to order home delivery groceries; less than one fifth (17%) of adults over 55 say they would do this vs. over 3 in 10 Gen Z (33%) and Millennials (36%) and 35-44 (37%).

Implication:

Food marketers, retailers and grocery stores need to protect the public health as getting food is lessening social distancing. Can your company and brand help seniors? What is the modern 'meals on wheels' to help our older Americans stay safe inside their homes?

Section:

04

Topic:

THE KIDS ARE ALRIGHT

Introduction:

While a quarter of Americans feel isolated, social distancing does not have to mean isolation and youth are leading the way: over half (55%) of Gen Z and nearly 4 in 10 Americans say they are virtually connecting with family and friends via FaceTime and other means; over two thirds (35%) of Gen Z had a virtual gathering with friends just in the last week (20% of all Americans).

Implication:

What can your brand do to facilitate virtual engagement? You don't have to be a video conferencing company, but what role can you play in helping create engagement with people under the constraint of a shelter in place? And especially with our nations' kids, who seem to enjoy the family time (thus far).

Section:

05

Topic:

OUR (VIRTUAL) TOWN

Introduction:

We are also seeing a strengthening of our sense of community in our data: 44% say they have “checked in with someone they hadn’t reached out to in a while” and nearly a fifth (19%) have 'helped an at-risk friend or neighbor with errands.’

Implication:

There is huge opportunity to find “good” in this experience. What can businesses do to re-educate, re-prioritize, re-appraise? And if virtual living is here to stay for an indefinite period, how do communities change? What do households look like in a world where classes, playdates and conference calls are all conducted under one roof?

Section:

06

Topic:

COPING WITH CABIN FEVER

Introduction:

Americans are staying active, mentally and physically; (36%) are getting back into old hobbies and (25%) are picking up new ones. This is highest among Gen Z (54%) and lowest among older Americans 65+ (27%). 36% are going for daily walks, this is highest among older Americans 65+ (40%). People are also searching for a reprieve by tuning out the news: 4 in 10 Americans say they are “reading more non-news related content to cope”. And almost 4 in 10 Gen Z are setting routine breaks in the online classes or the workday vs. only 10% of adults ages 55-64 and 15% 45-54.

Implication:

Think about what the American family will need not now but perhaps 4 to 6 weeks from now? Video conferencing companies and online streaming are early winners, but what about cappuccino machines, at-home streaming workouts and virtual gyms?

What emotional and educational support will children need for extended online education? And how is that made accessible to all Americans?

Section:

07

Topic:

BAILOUTS, SAY OLDER PEOPLE

Introduction:

Americans say the industries being hit the hardest deserve bailouts: small business (63%) healthcare (58%) and restaurants (53%). Younger Americans are more likely to oppose bailouts while older are more likely to support. And while two-thirds (65%) say it would make no difference if a company receives a bail out, nearly a quarter would either stop using the product/service entirely (8%) or shop for an alternative (15%). 30% of Gen Z would stop buying from a company that received a bailout.

Implication:

Understanding the values of your audiences by demography will be important in navigating the pandemic to prioritize issues, messaging, tone and intention. While a topic such as bailouts created similar sentiment in our data during the global financial crisis (and no one stopped buying cars), the political axis has shifted in our country; yet at the same time, Americans' macro worries about the economy might be more important.

Section:

08

Topic:

YOUNG PEOPLE SAY 'MEH'

Introduction:

As of this morning, nearly 1 in 5 Americans are ordered to stay indoors. Most Americans are obeying and say they would still leave the house to go to the grocery store (85%), the pharmacy (81%), or to care for family members in another household (67%). But Gen Z are least compliant: one third (32%) of those aged 18-24 would go out to visit friends, more than half would go to a restaurant for carry-out (53%), and 28% would have dinner at a friend's house. Overall, Americans plan on complying with the sweeping national restrictions. The vast majority of Americans would follow mandates that restrict: convening groups larger than 10 people (93%), international travel (94%), and non-essential workers to their homes (91%).

Implication:

If you are a youth brand or have Gen Z in your target audience sphere, urge them to frame compliance like a social cause issue. How can you be pro-climate change and pro-hurting vulnerable people? This is their chance to make a tangible difference in a crisis. Marketers that with success talking to youth should use their skills for the national good. We need a Rosie The Riveter for Gen Z.

Section:

09

Topic:

SHORTAGES AND PANIC BUYING

Introduction:

Americans are increasingly concerned about healthcare shortages to address the COVID-19 outbreak: nearly 9 in 10 Americans are concerned of a potential shortage of healthcare workers (doctors, nurses, support staff, up 8% since last week). 86% of Americans are concerned about a potential shortage of hospital ventilators (for assisted breathing) or hospital beds (up 9% in the last week). Approximately 4 in 5 Americans are concerned about a potential shortage of surgical masks and gloves (83%) or testing kits for COVID-19 (82%). Concern for a shortage of surgical masks and gloves and testing kits for COVID-19 have increased since last week (12% increase and 9% increase, respectively).

Implication:

Companies are not waiting for the government to retool to combat C-19. As this never before seen crisis envelops our national healthcare system you must plan far in advance now.



WAVE 2

WAVE 2 INTRODUCTION

Our second wave survey dives deeper into American attitudes and perceptions of companies and brands in handling the pandemic. The second study was fielded online among a nationally representative sample of **2,050** U.S. adults from **March 14-15, 2020**.

Section:

01

Topic:

SOCIAL MEDIA AND THE EXISTENTIAL THREAT

Introduction:

While the majority (73%) of Americans don't fear dying from the Coronavirus (and the same amount say they have not been tested and don't think they should) — others aren't so sure: more than a quarter (27%) of all adults say they fear dying from C-19 and this is highest among men (30% vs. women 25%). Men's concern is heightened on this issue: they are twice as likely as women to think they could die and should be tested for the Coronavirus.

Yet how can 27% fear dying (yet only 16% fear of contracting) the virus? That's hysteria and irrationality. In our survey, 54% agree "The amount of fear is irrational, people are overreacting." When asked, the top contributing factors to fear are drastic headlines about how society is changing (79%); news and images of people fighting over products at the grocery store (78%); constant

posts about people's reactions to the outbreak (75%). And half of Americans (50%) say trying to keep up with all the safety recommendations is driving their fear.

Implication:

When using social media for communications, companies and brands should explore steering away from "fear-based" marketing strategies. While fear-based marketing may lead to short-term results, it may not be useful for creating long-term relationships with customers and building your brand.

Section:

02

Topic:

THIS PANDEMIC IS EVERYONE'S FIRST RODEO

Introduction:

Core to the fear is a universal lack of experience: nearly three quarters of Americans (**74%**) say the fact that this is their first time experiencing a global pandemic is contributing to their overall fear. And this is universally felt among Millennials, (**80%**), Gen X (**73%**) Boomers (**69%**) and Seniors (**65%**). And nearly half of all Americans (**46%**) agree "I think the amount of fear is sensible given how serious the pandemic has become." There's simply no historical playbook for what we're living through.

Implication:

Companies must educate their employees and customers and provide information as it evolves.

Section:

03

Topic:

CONTAINING THE VIRUS

Introduction:

Yet the overwhelming majority of Americans feel we will eventually contain the virus. It's important to note that almost a quarter (22%), however, think it will not be contained (and this is highest among Millennials and lowest among Seniors: 25% vs. 12% of 65+). As seen in our latest analysis for [Forbes: U.S. Seniors are the least worried and least informed](#). On average, Americans anticipate it will take more than four months for the response to the coronavirus outbreak to last.

Implication:

4 months is far off from 14 days. The question is, in order to not to lose your market position, what is your brand going to do during and what are you going to do after?

Are your brand's near and longer-term strategies for a non-public consumer?

Section:

04

Topic:

SAYING VS. DOING

Introduction:

While nearly three quarters of Americans (74%) say they're afraid of accidentally spreading the virus to vulnerable people, even if they're not experiencing symptoms, they're not changing their daily patterns to mitigate risk to other people: (89%) are still going coffee shops; (66%) are still going to restaurants and bars; (58%) have not changed how much they're having people over. This data and others have caused public officials to limit crowds and take actions to urge people to stay at home.

Implication:

Consumer behavior is being forced to change daily. How are you keeping both your loyal and new consumers engaged? Are you prepared to pivot daily/weekly?

Section:

05

Topic:

WORKERS ARE CRITICAL OF BUSINESSES

Introduction:

Workers say it's time to stop the emails and start with the policies: one-third of workers say their employer hasn't instituted any actions or policies in response to Coronavirus. Only 11% say their employer has offered to cover out of pocket healthcare costs for preventative care (e.g., C-19 testing, PCP visits, etc.) and only 10% say their employer has offered 3rd party services/resources to promote well-being and adjustment amid the outbreak. What do they want? 57% strongly want employers to enact paid sick leave and 52% want extended insurance policy.

Implication:

- Companies and brands must focus on clear communications and provide support and services to protect different generations of their workforce.
- What is the company's strategy for paid sick leave and extended insurance?
- Does the company have business contingency plan?
- How is the company supporting dual working parents with kids that require care and supervision at home?
- How is the company supporting the elderly; how can they provide in-home services, etc.?

Section:

06

Topic:

SCIENCE HAS ITS MOMENT; LOCAL TRUST IS HIGH

Introduction:

Medical sources are the most trusted on the topic of Coronavirus. Trust is high among doctors/nurses (**93%**), CDC (**89%**) Medical journals (**84%**), while social media is not to be trusted on C-19 (**63%** say it is not trustworthy). Meanwhile **74%** of Americans trust state and local governments vs. **59%** of the federal government.

Implication:

Personalization and localization is more important than ever. How are you evolving your mass communication efforts to support your consumers facing different challenges locally?

Have you explored an addressable media approach (reaching the right consumers, at the right time, with the right message)?



WAVE 1

WAVE 1 INTRODUCTION

Below is a summary of selected findings from the Harris Poll first survey on the coronavirus outbreak fielded among a nationally representative sample of **2,019** U.S adults from **March 5-9, 2020**. These findings preceded The President's Travel Ban/NBA cancellation. Future waves will dive deeper into American attitudes and perceptions of companies and brands in handling the pandemic.

Section:

01

Topic:

AMERICANS HIGH ON ANXIETY/LOW ON ASSESSING RISK

Introduction:

As national anxiety rises, half the nation fears they will die of C-19; yet the most at-risk are the least concerned (Millennials are the most concerned).

Statistics:

72% of Americans are very concerned about the spread of the virus reaching their local area.

Nearly 6 in 10 (57%) of Millennials vs only 47% of 65+ are concerned about dying due to C-19.

Implication:

Unclear information to date is now coalescing, making the role of transparency and trust paramount.

Section:

02

Topic:

SENIORS ARE THE MOST DEFIANT (YET MOST VULNERABLE)

Introduction:

The most vulnerable demographic are also the least willing to change their behavior amid the C-19 outbreak.

Statistics:

81% of 65+ are still willing to attend family social gatherings vs. only 71% of Millennials.

Implication:

Companies and brands must focus on clear communications and services to protect the elderly; how can they provide in-home services, etc.?

Section:

03

Topic:

AMERICAN WOMEN MOST CONCERNED

Introduction:

Women are more concerned than men about the spread of C-19 in their community, while Millennial/Gen X men are more concerned than women about dying from the virus.

Statistics:

- 82% of women are very concerned about the spread of the virus in the U.S. vs. 72% of men
- 75% of women are very concerned about the virus reaching their local area vs. 68% of men
- Meanwhile, 63% of men ages 35-44 are very concerned about dying from C-19 vs. only 58% of women ages 35-44

Implication:

Marketers should be considering the critical importance of winning over their loyal women customers by abating fear and providing value-added services, such as zero-interest services to protect the elderly; how can they provide in-home services, etc.?

Section:

04

Topic:

AMERICANS ARE COCOONING

Introduction:

Americans are shifting behavior by avoiding non-necessity outings, for now.

Statistics:

- More than 8 in 10 are still willing to go to the grocery store, work, pharmacies and social gatherings
- Meanwhile, less than half are willing to go to sporting events (44%), bars (42%), and gyms (42%)
- 83% still feel obligated to go to work even though they are unwilling to go to other public places
- 53% are still willing to go to schools despite the Coronavirus outbreak

Implication:

A boom to home fitness, cleaning supplies, e-sports, online learning platforms and streaming services, not live events, gyms and travel/hospitality industries — what is your brand's near-term strategy for a non-public consumer?

Section:

05

Topic:

THE CORONA ECHO CHAMBER

Introduction:

C-19 is all Americans can talk about but the way we're talking about it is likely making national anxiety worse.

Statistics:

- 63% have talked to someone about C-19 (friends, family, colleagues, doctors) since the outbreak
- 60% say "people I know talk about the Coronavirus like it's a horror movie"
- 61% are concerned xenophobia will increase in America due to the Coronavirus outbreak
- A quarter of Americans feel unknowledgeable about the Coronavirus

Implication:

Companies must educate their employees, customers and provide information as it evolves.

Section:

06

Topic:

LOSING FURTHER FAITH IN GOVT. & MEDIA

Introduction:

Americans, now awakening to the real threat, are frustrated at government's effectiveness, but also blame the media for 'dramatizing' the Coronavirus outbreak.

Statistics:

- 63% of U.S. women are more likely to be concerned about the government's ability to effectively respond to C-19

Implication:

In a recent Harris Poll, 60% of Americans said business should step in to solve social issues where the government is lagging: without being opportunistic, how can your brand be helpful?



KNOWLEDGE IS POWER
