

# COVID-19 Consumer Changes Poll



Over the Horizon Strategies  
Reputation Leaders

May 14, 2020  
Poll of 1,000 US adults nationally

# Impact of COVID-19

## **Nearly all (95%) of Americans have been impacted by the COVID-19 pandemic in some way**

- 14% have missed important life events, such as funerals (26%), weddings (25%), and births (8%)

Americans are now reading more news and spending time alone, but also connecting with others online

- **Three quarters (75%) say they are connecting with friends or family in person or via Zoom, Skype, etc.**

- 1 in 5 (19%) have also been participating in social events online, like bingo and house parties

## **Most American's think life won't get back to normal until at least summer or fall**

- One in eight (12%) say things will never go back to normal.
- Women and older generations are most skeptical

# Consumer purchase habits during COVID-19

In the last month, Americans have bought mostly groceries, cleaning products and medicine

- one third have increased their grocery and cleaning product purchases.
- One quarter (26%) of Americans started grocery shopping online during the crisis; and 1 in 5 (21%) will continue after the crisis abates

Clothes, accessories and personal care purchases saw both decreases and increases

Across all categories, very few will stop purchasing online after the crisis.

Online pharmacies and medicine deliveries appear to be benefitting from the switch to online channels which could positively affect Walmart, CVS, and other dotcom pharmacies

Whilst stuck at home, **Americans are investing in interests to keep them occupied**

- Puzzles/jigsaws – 18%
- Education/self-improvement – 9%
- Audio/entertainment – 8%

With a quarter (24%) of Americans now physically exercising more than they did before and one-third (32%) being unable to exercise outdoors, 1 in 10 have purchased fitness equipment or services in the last month and half of those have purchased more than they usually would.

# Work and employers

Due to the pandemic, **2 in 5 (44%) Americans have started working from home**, leading 8% to buy home/office equipment

- However, one-third (31%) are feeling less socially connected to their colleagues

**Nearly a quarter (24%) of part-time workers have lost their jobs**, but Americans are thinking creatively with 12% starting a side-hustle or gig-work since the pandemic began

One-third (33%) of Americans now admire their employer more than before

- The majority say their employers have been communicating clearly, appropriately, frequently, and credibly during the pandemic – and 61% have found the information they have provided useful
- 44% who think their employer has communicated well during the pandemic say their admiration for their employer has increased.

# Brand actions and social responsibility

## **Americans say it is most important for companies and brands to be prioritizing employee support and availability of products during the pandemic**

- Nearly half (46%) also say companies must not profiteer or increase prices.

Retailers Amazon, Walmart, and Target are seen to be acting the most responsibly among American companies during the pandemic.

People are increasing their use of online brands, but brands are losing relatively few customers.

Zoom and Amazon are the main brands people have started using in the last month

# Who do Americans admire more in this pandemic?

Within the context of the COVID-19 pandemic, **Americans admire front line workers more than their family and friends**, with doctors and nurses admired the most (80%) followed by grocery store workers (77%)

Nearly half also admire their communities more than before (48%)

**Local businesses/restaurants come out on top in respect.**

Contrastingly, 1 in 5 Americans now admire big businesses less (19%) than a month ago, but two-thirds admire local businesses/restaurants more (61% respectively)

**Respect for governments is wavering and divided**

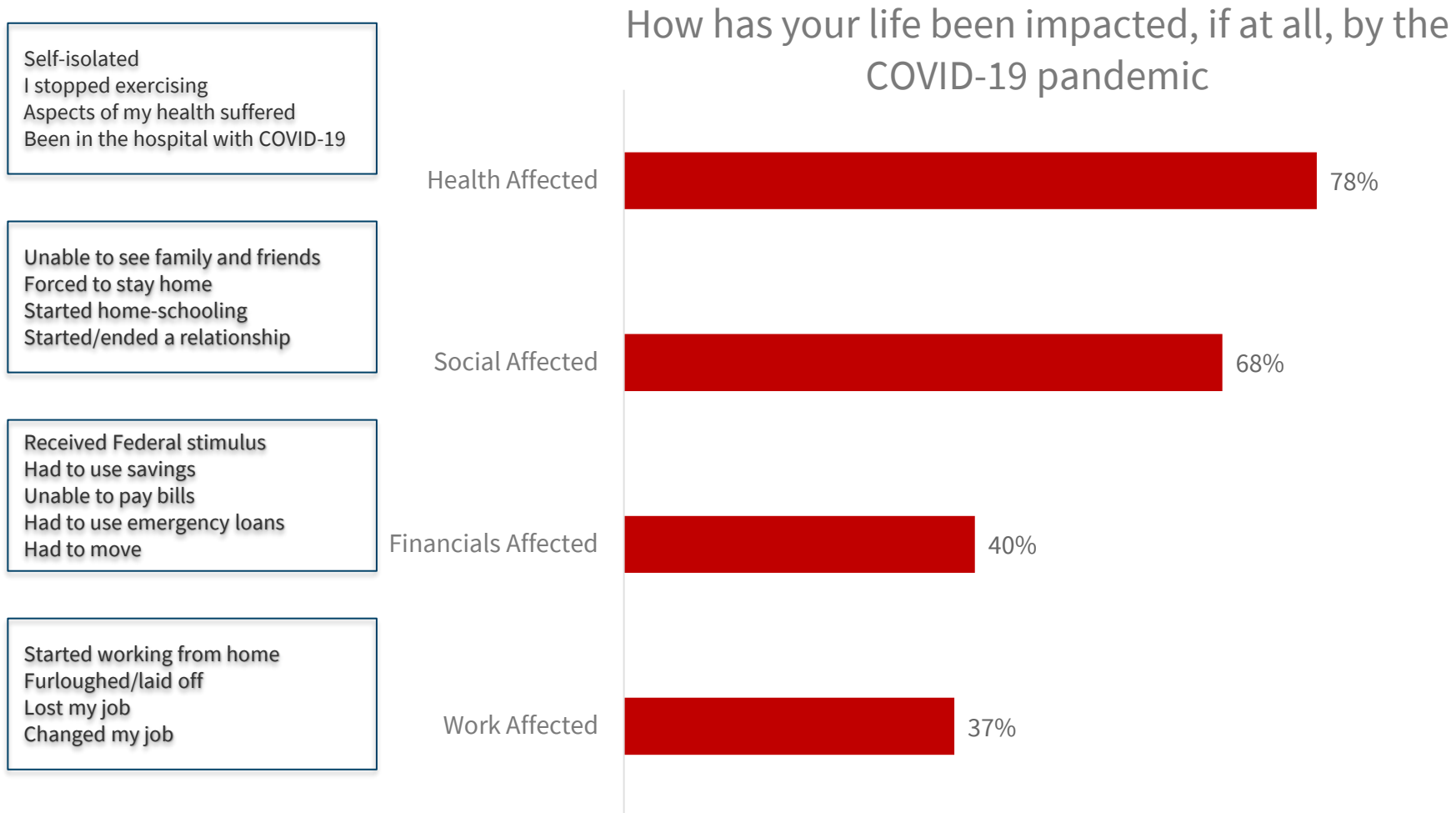
- One-third of American's now less admire their federal government (31% less) and state government (30% less)
- However, one-third say they admire their government more and one-third haven't changed their opinion

Media and journalists have taken a hit with one quarter (24%) respecting them less than a month ago.



# Lifestyle

# Health and social aspects are most affected by the COVID-19 pandemic

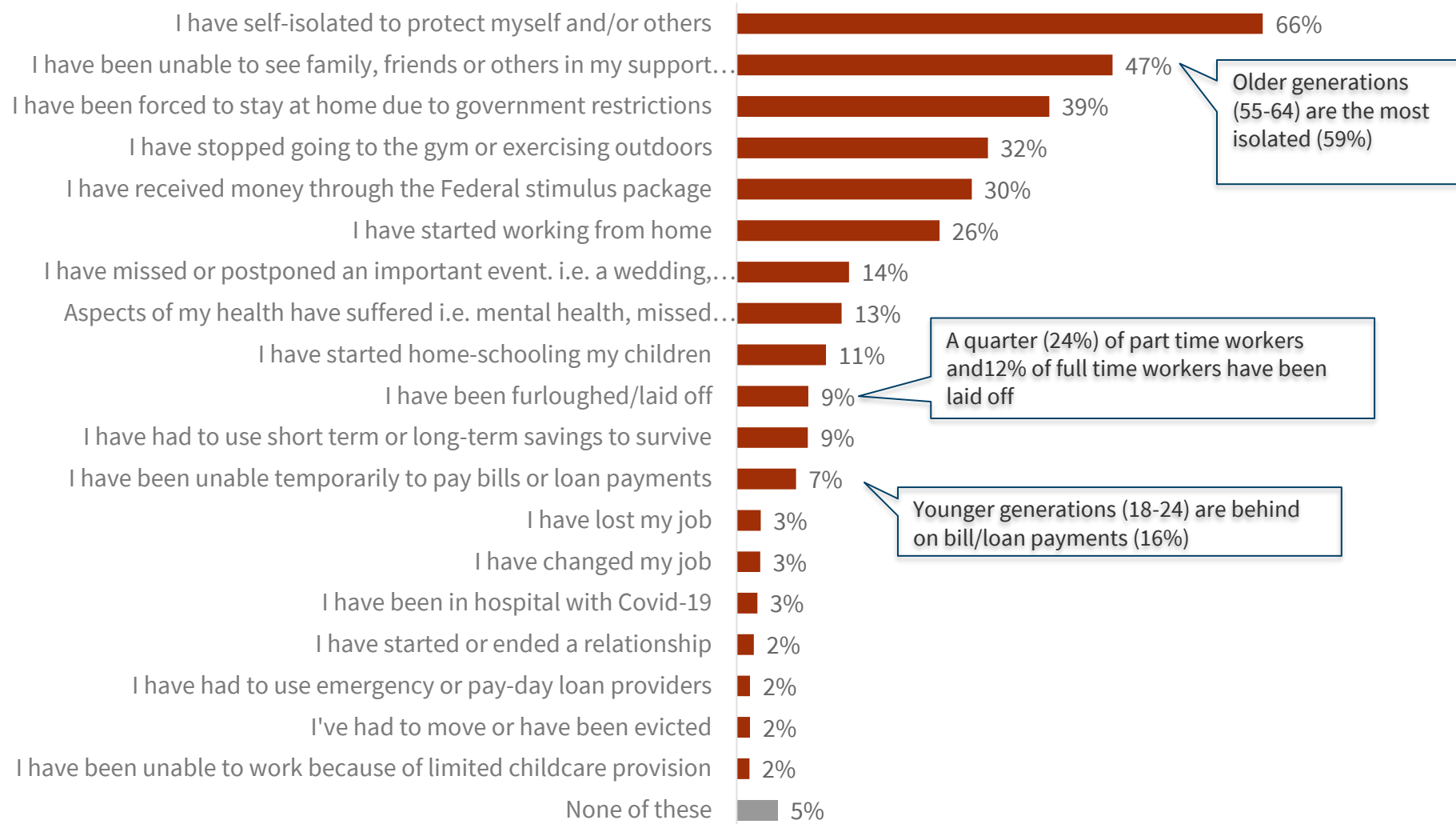


Q9. How has your life been impacted, if at all, by the COVID-19 pandemic? Showing percent where at least 1 underlying option was selected



# People are mainly self isolating and unable to see their family or friends

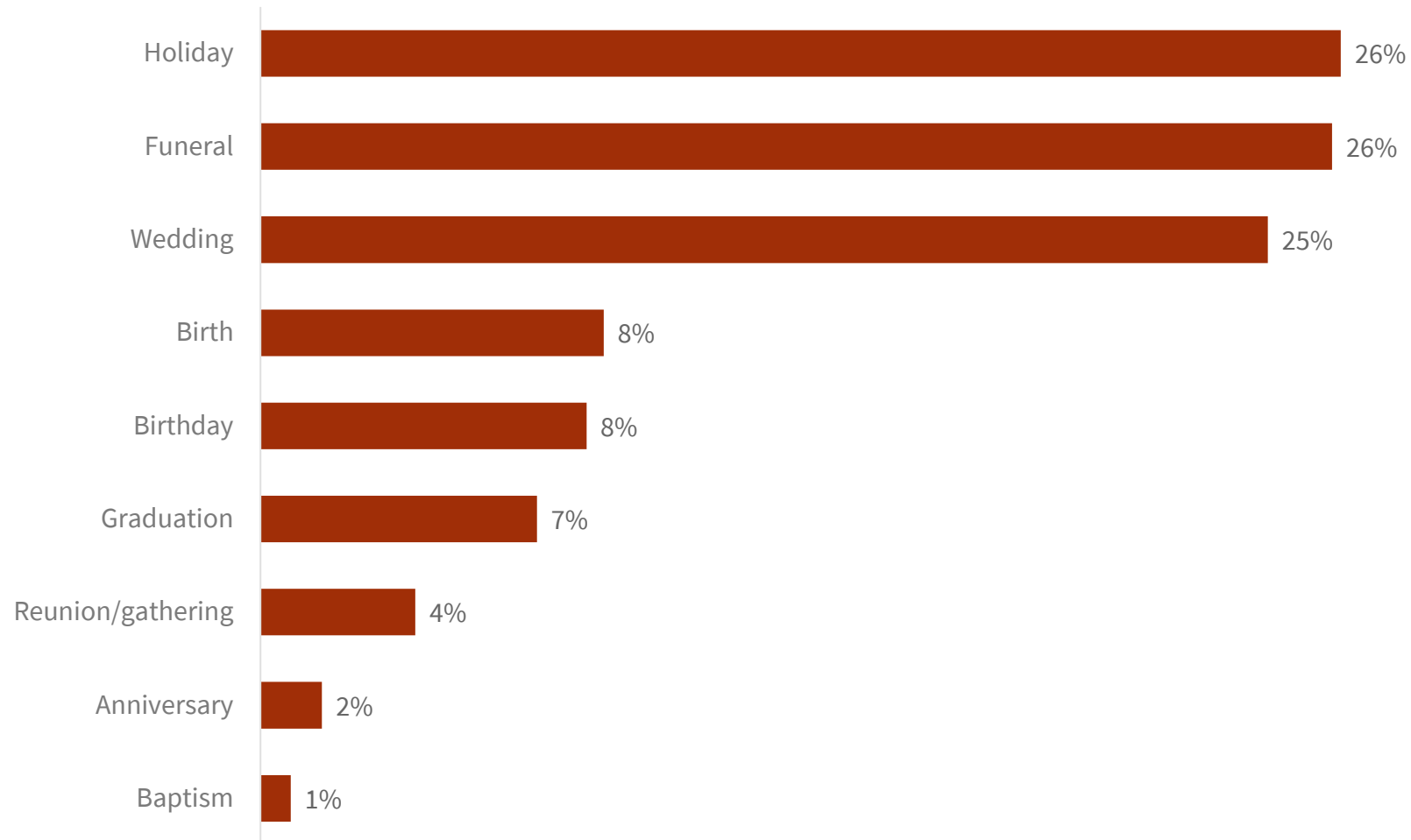
## Nearly a quarter of part time workers have been laid off



Q9. How has your life been impacted, if at all, by the COVID-19 pandemic?

# 14% say they missed or postponed an important event

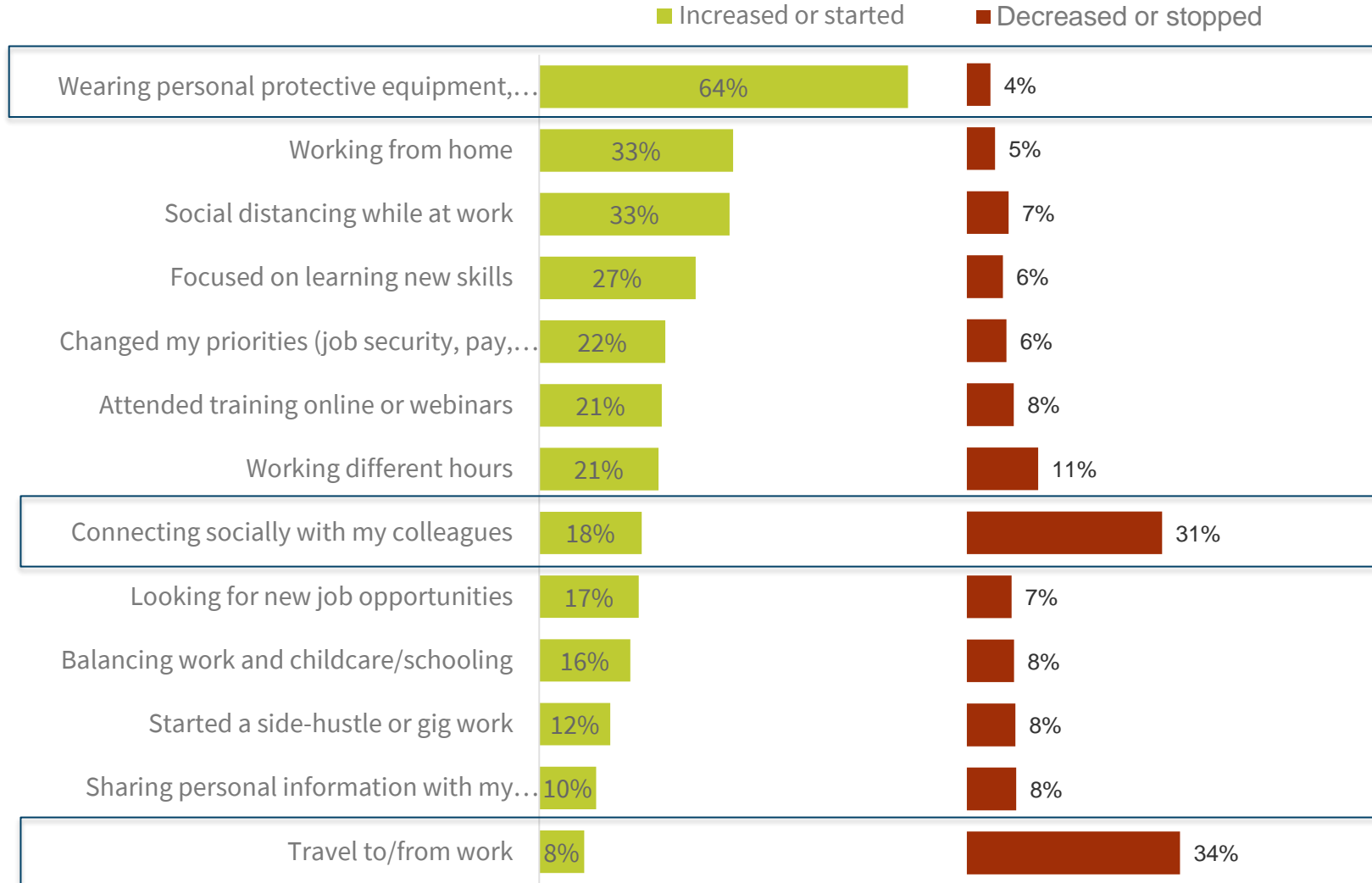
## Holidays, weddings and funerals are the most missed events



Q9. How has your life been impacted, if at all, by the COVID-19 pandemic? – Coded open end of those who selected “Missed or Postponed an important event” n=122

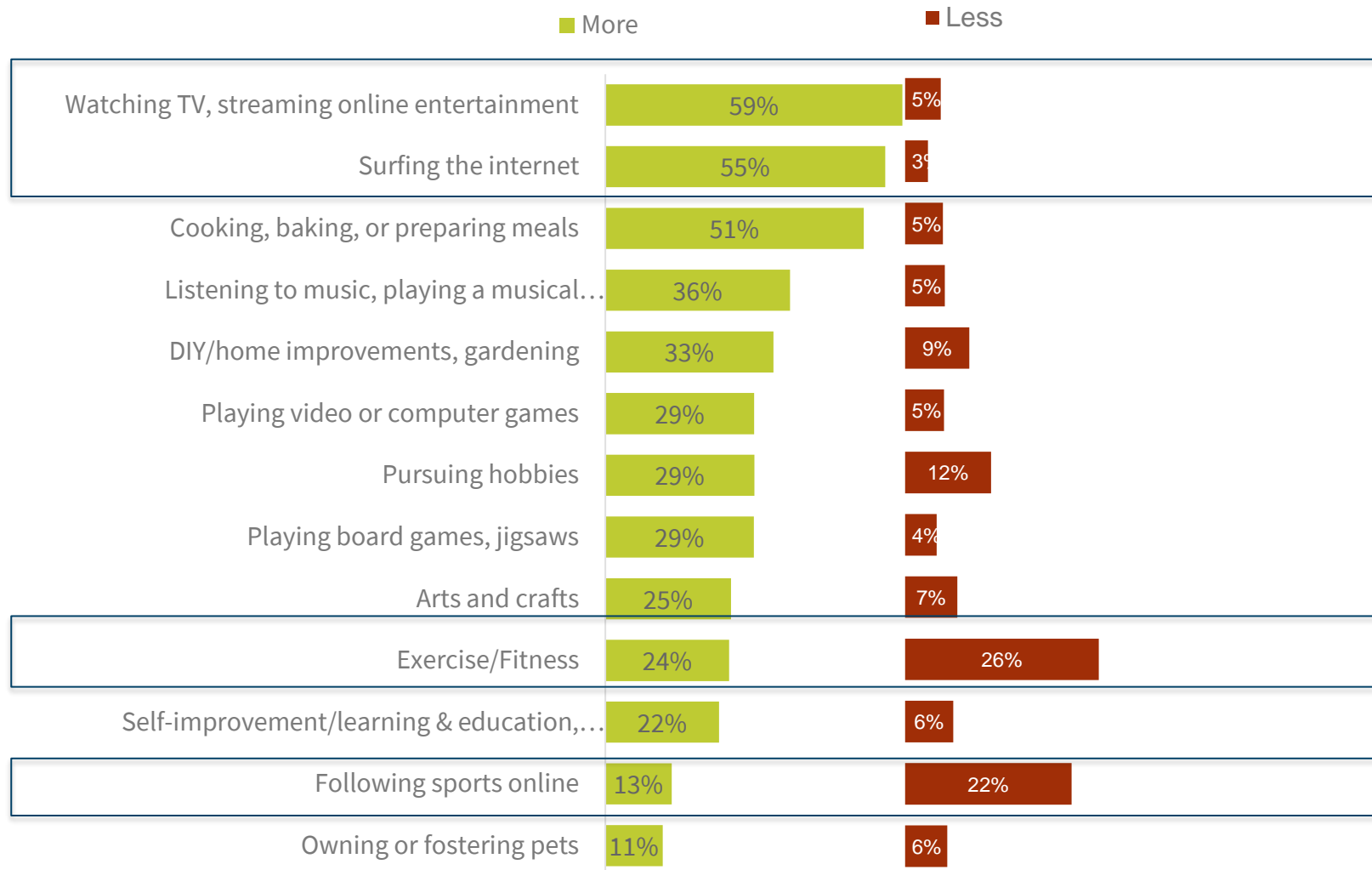
# Wearing protective equipment has increased for most as a result of the COVID-19 pandemic

People have also decreased their work related travels and social connections



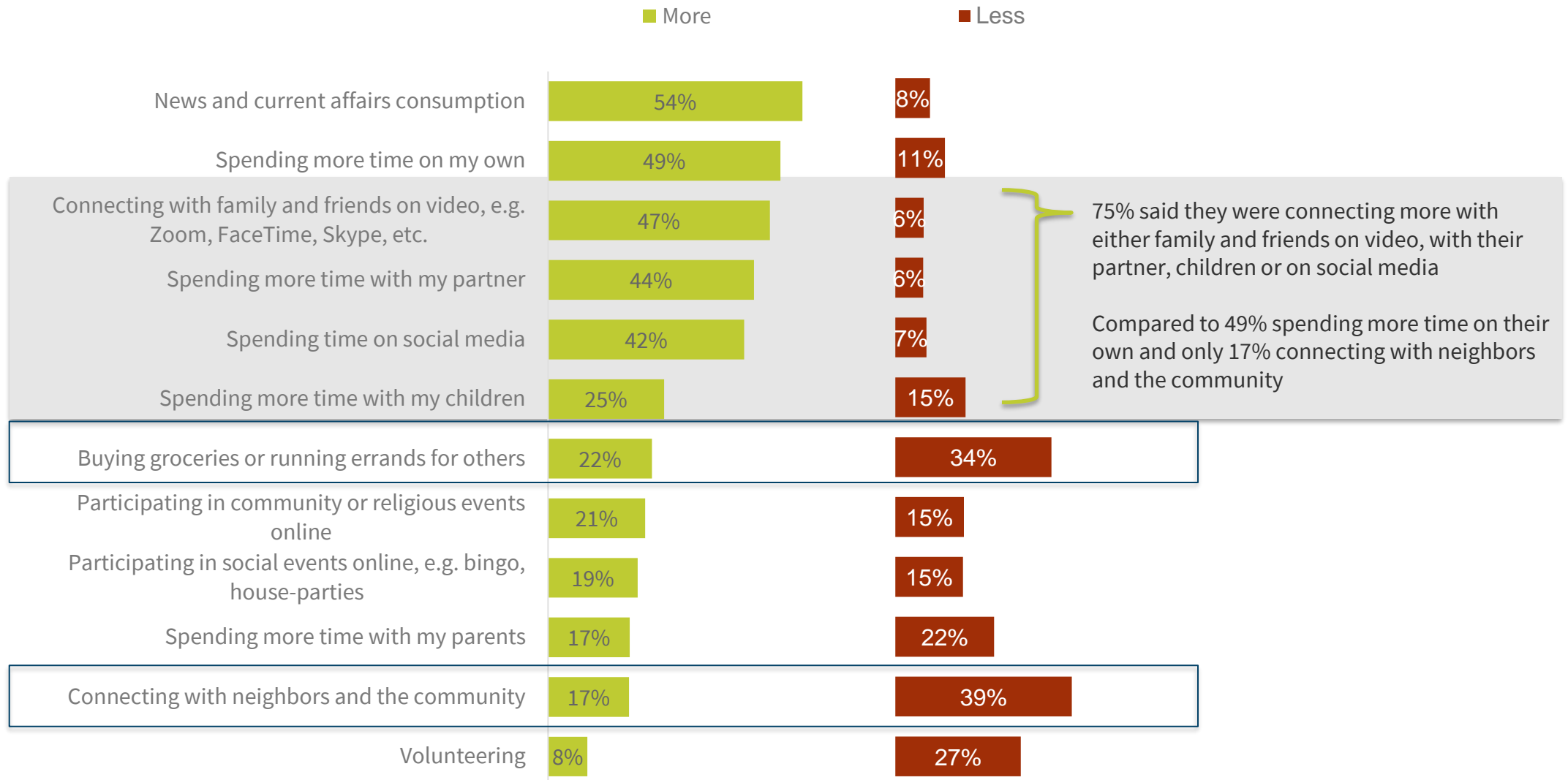
Q10. How has your work life changed in the last month as a result of COVID-19? (Asked to those who are employed. N=904)

# The pandemic resulted in an increase in sedentary lifestyle – people streaming more and exercising less



Q11. How has your leisure, recreation, sport and entertainment changed in the last month as a result of COVID-19?

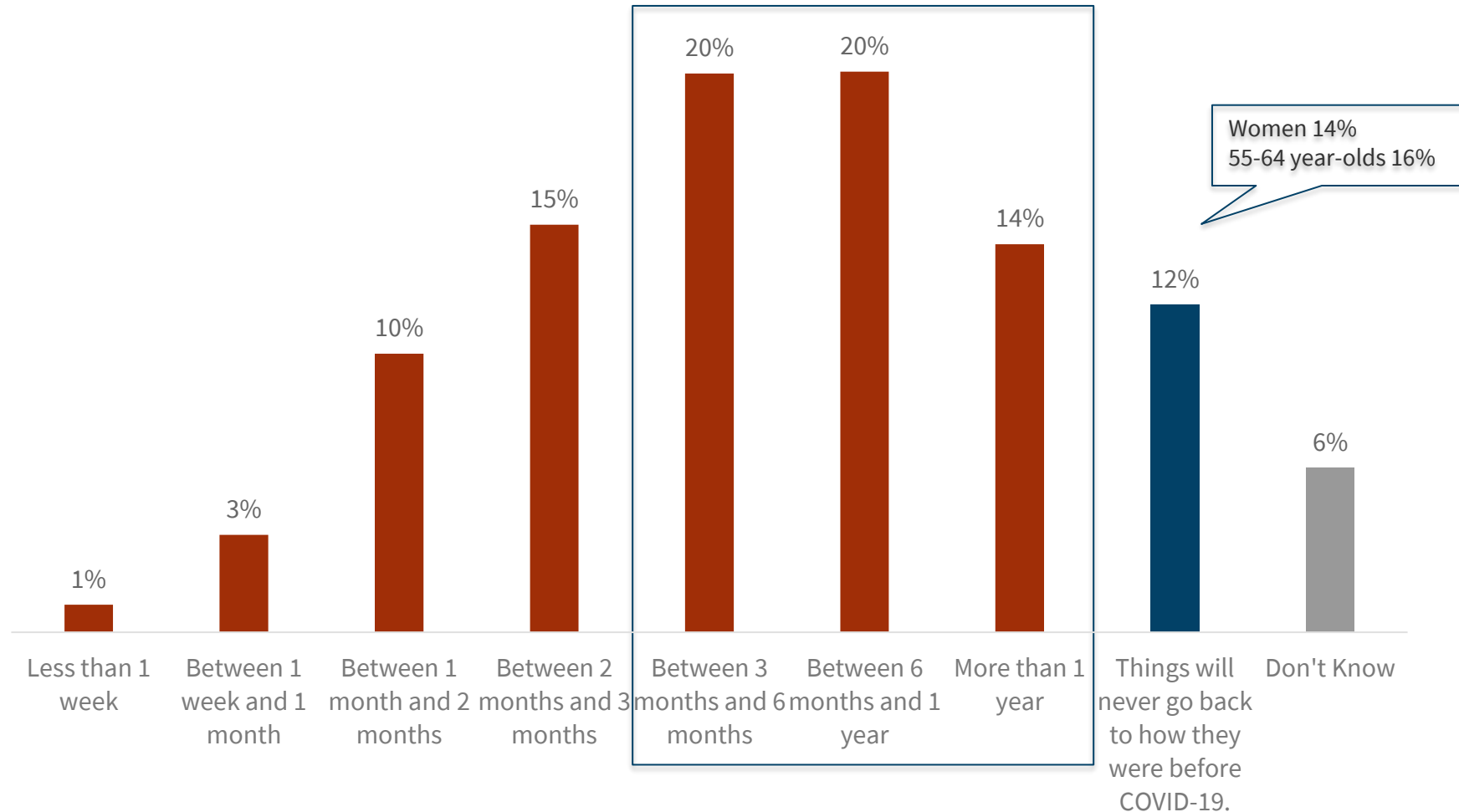
# People say they have been reading more news and spending more time on their own, but connecting online



Q12. How has your social life changed in the last month as a result of COVID-19?

# The majority think life won't get back to normal until at least Summer/Fall

12% say things will never go back to normal – women and older generations are the most skeptical

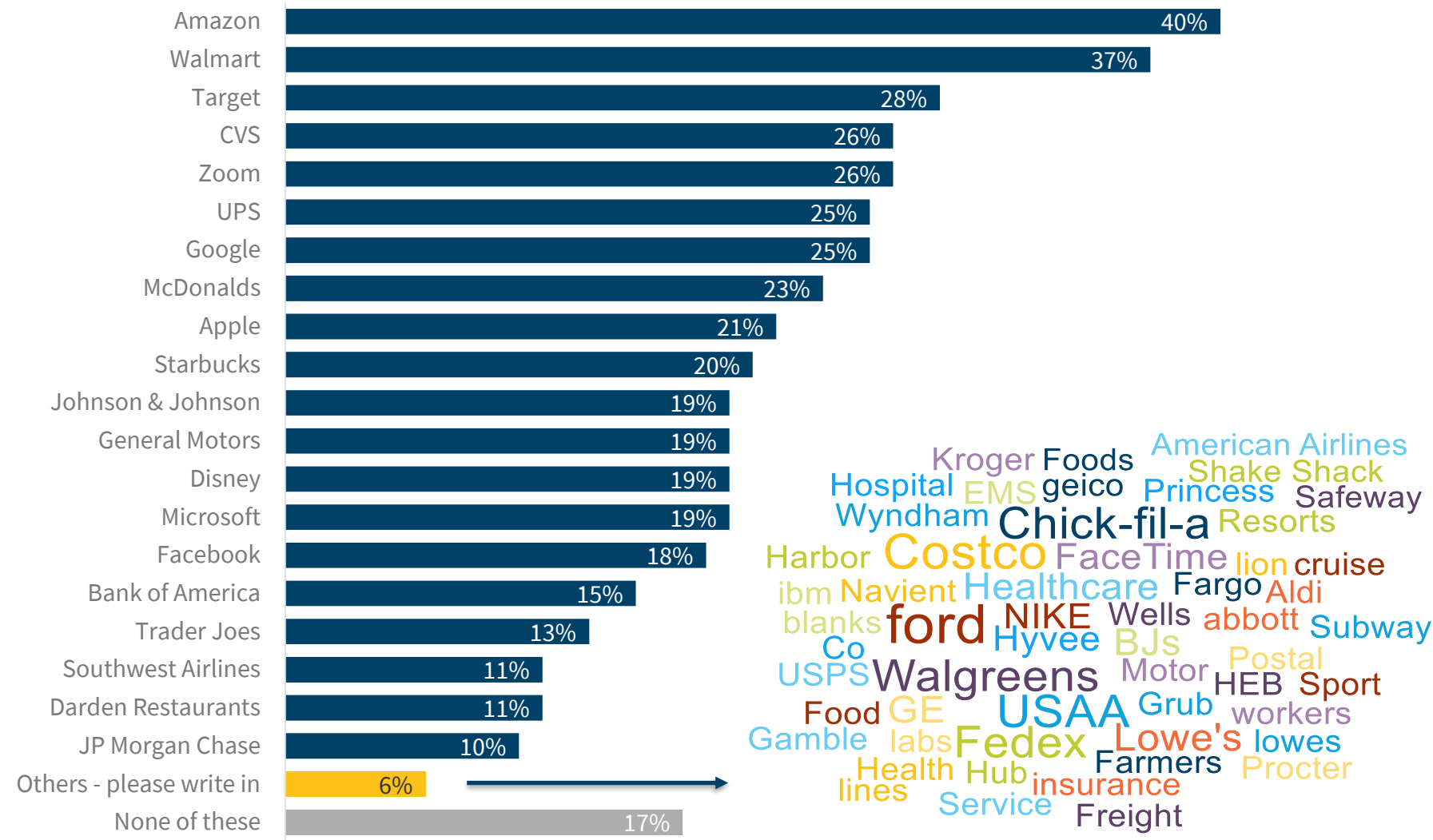


Q22. How long do you think it will be before life in America gets back to life as normal?



# Purchasing Habits

# Amazon, Walmart and Target are perceived to be acting the most responsibly during this pandemic

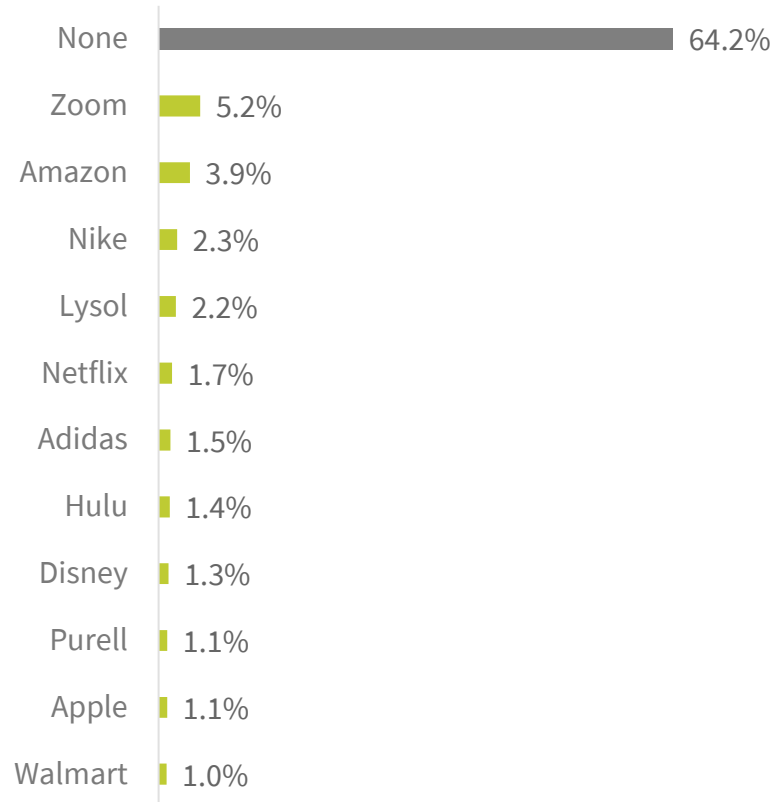


Q16. Which national brands are stepping up to the plate in this pandemic, i.e. acting responsibly?

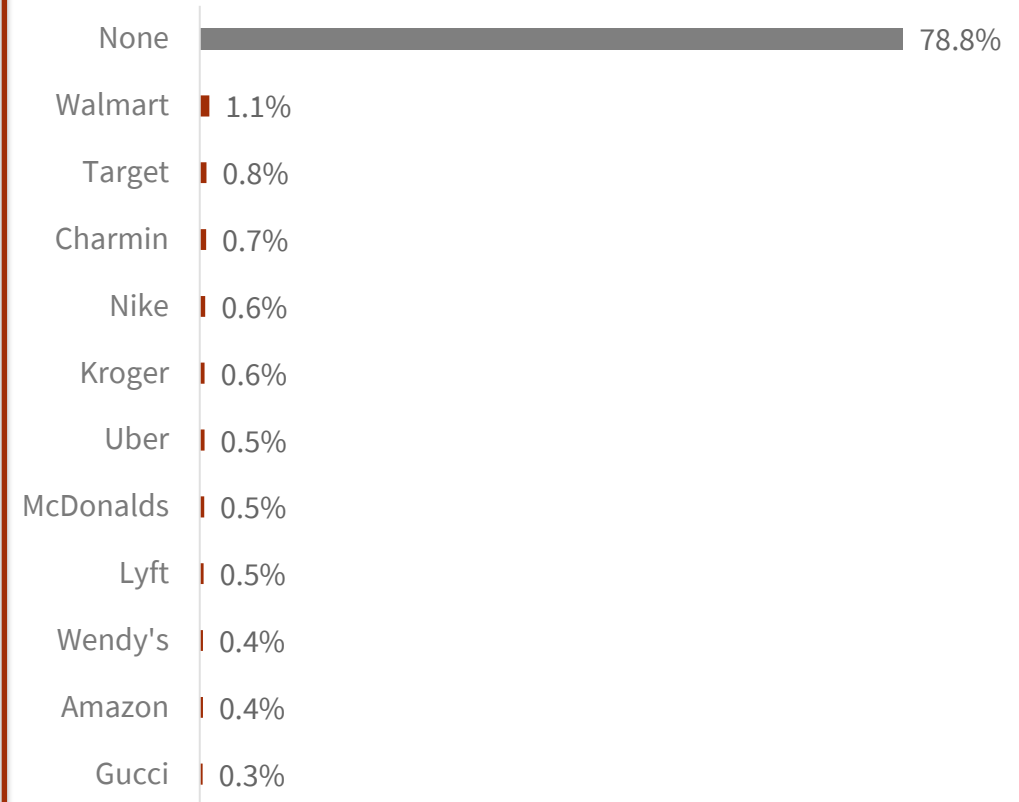


# People increasing their use of online brands brands losing relatively few customers altogether

Which brands, if any, have you started using in the last month



Which brands, if any, have you stopped using in the last month

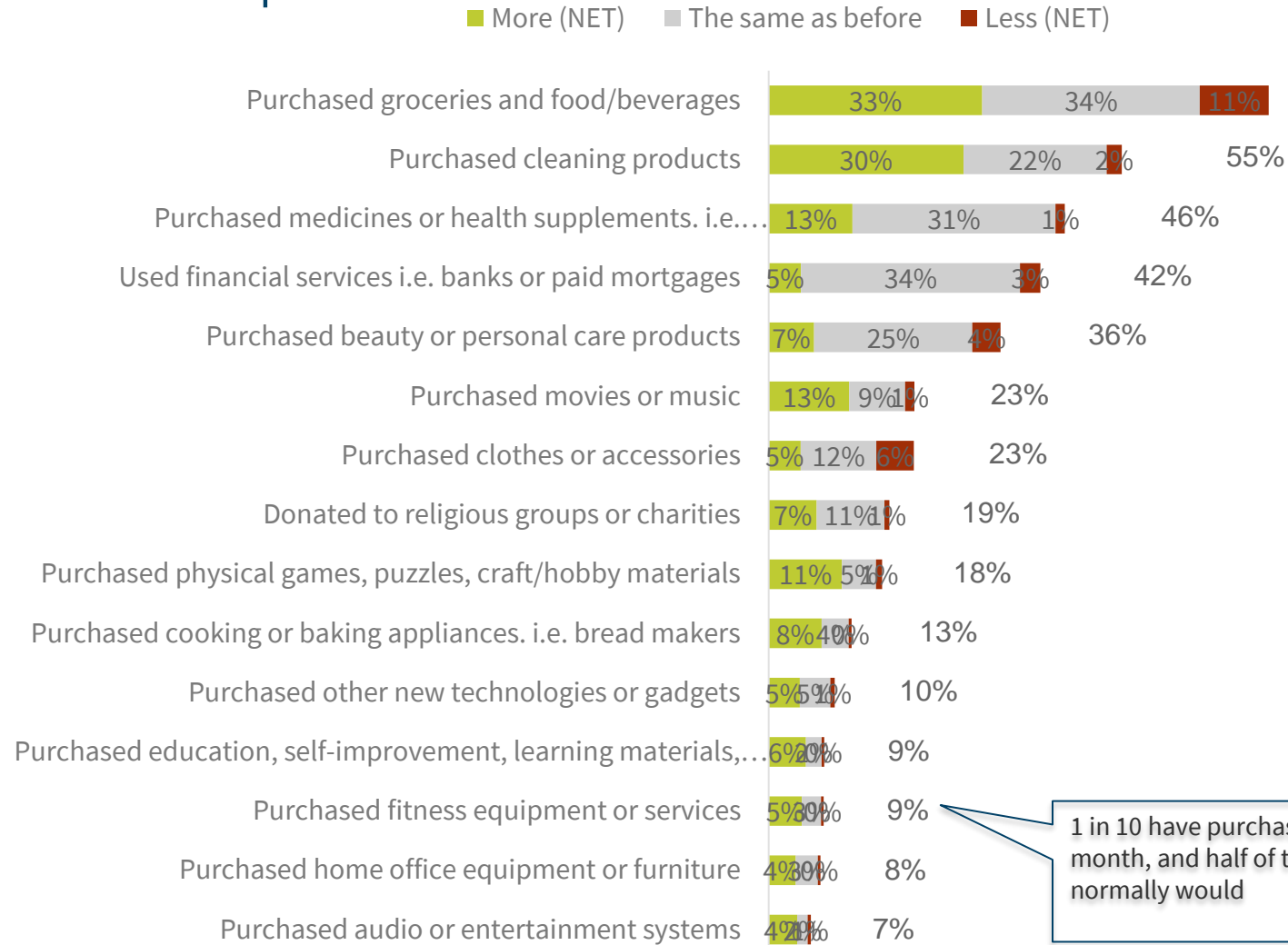


Q13: Which brands, if any, have you started using in the last month – coded  
Only showing the top 11 brands

Q14: Which brands, if any, have you stopped using in the last month  
Only showing the top 11 brands

# 1/3 respondents increased their grocery and cleaning product purchases

## Clothes, accessories and personal care saw increases and decreases



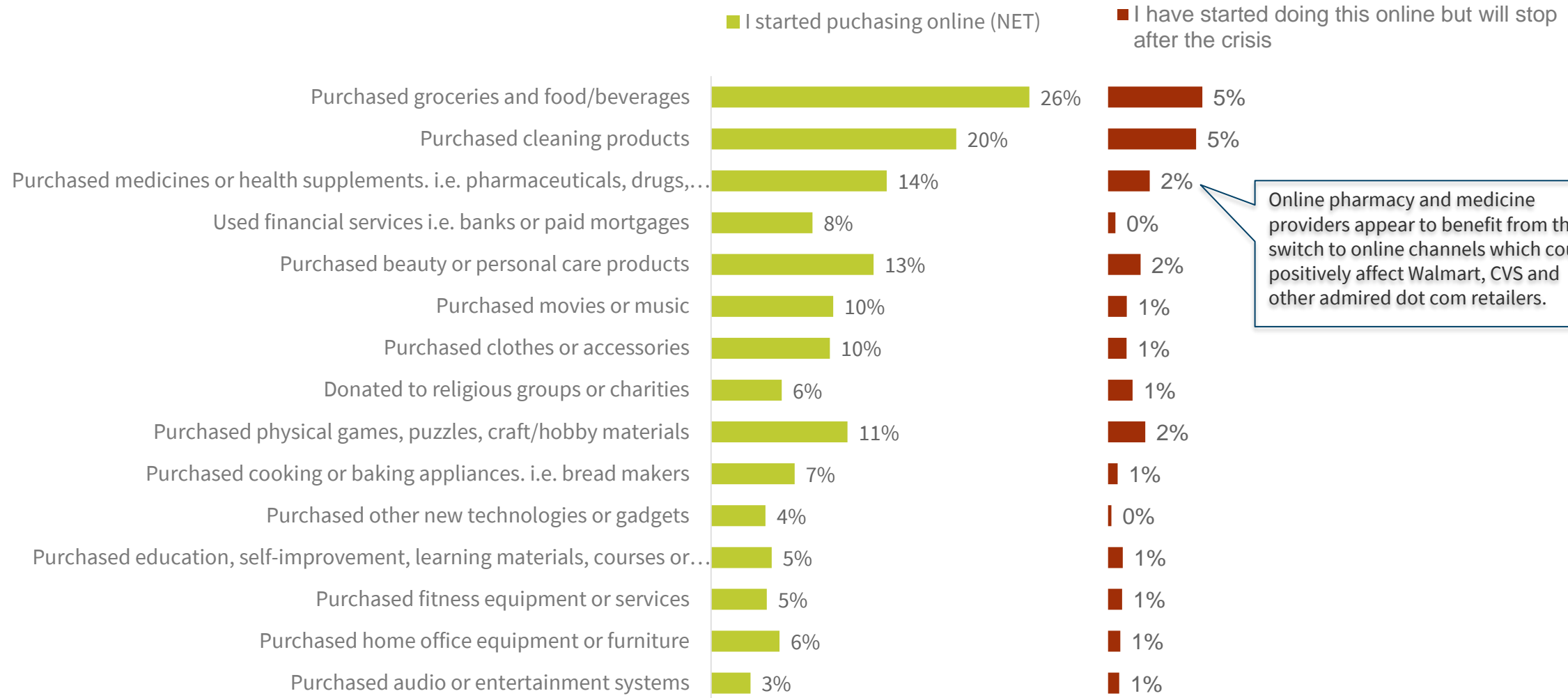
Percent of population that made a purchase in the past month in this category

78%

1 in 10 have purchased fitness products or services in the past month, and half of them have purchased more than they normally would

Q19. Considering the amount that you purchase, have you been buying more or less of the products from the above-mentioned categories since the start?

# 1/4 of respondents started grocery shopping online during the crisis. 21% of respondents will continue after the crisis abates. Very few will stop purchasing online in any category once they start



Online pharmacy and medicine providers appear to benefit from the switch to online channels which could positively affect Walmart, CVS and other admired dot com retailers.

Q20. How are your online shopping habits changing?



# Reputation

# Brand, society and people are the most important reputation pillars during a global pandemic

Financials come last

## Brand 71%

- Providing take-out or delivery options
- Maintaining the highest quality of product/service
- Looking to improve or upgrade their offer
- Maintaining a continuous availability of products/ services
- Making services or support available online

## People 66%

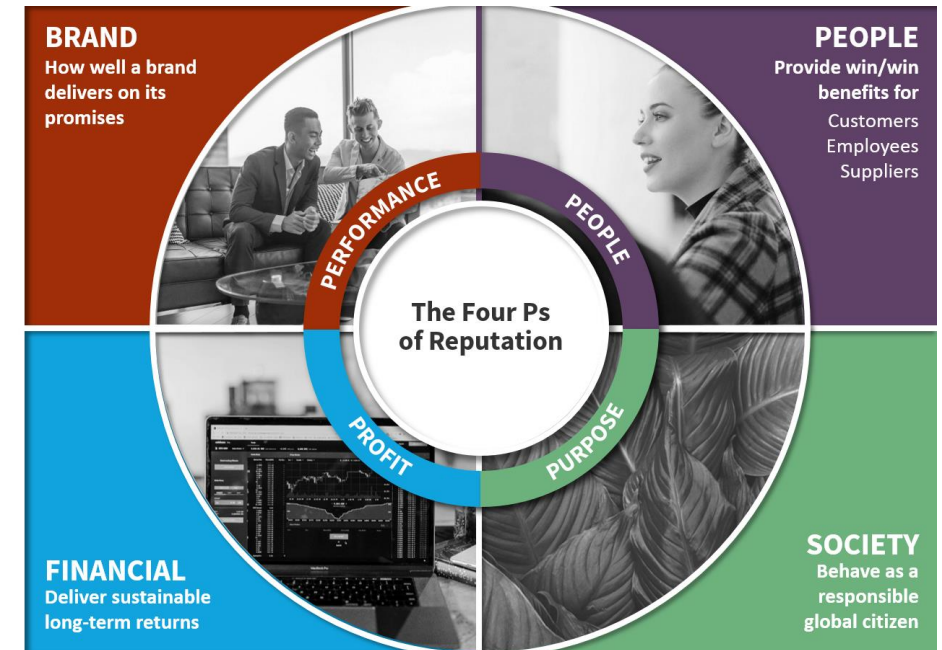
- Refunding customers for cancellations
- Supporting employees with protective wear
- Paying employees sick pay, paid time off, on furlough
- Lobbying government for stimulus grants or support for businesses and employees

## Society 66%

- Supporting local communities and the vulnerable/elderly
- Providing frequent and clear communications about actions taken in the pandemic
- Acting in an environmentally friendly way
- Developing products or services needed in the pandemic, e.g. ventilators, hand sanitizer, vaccines

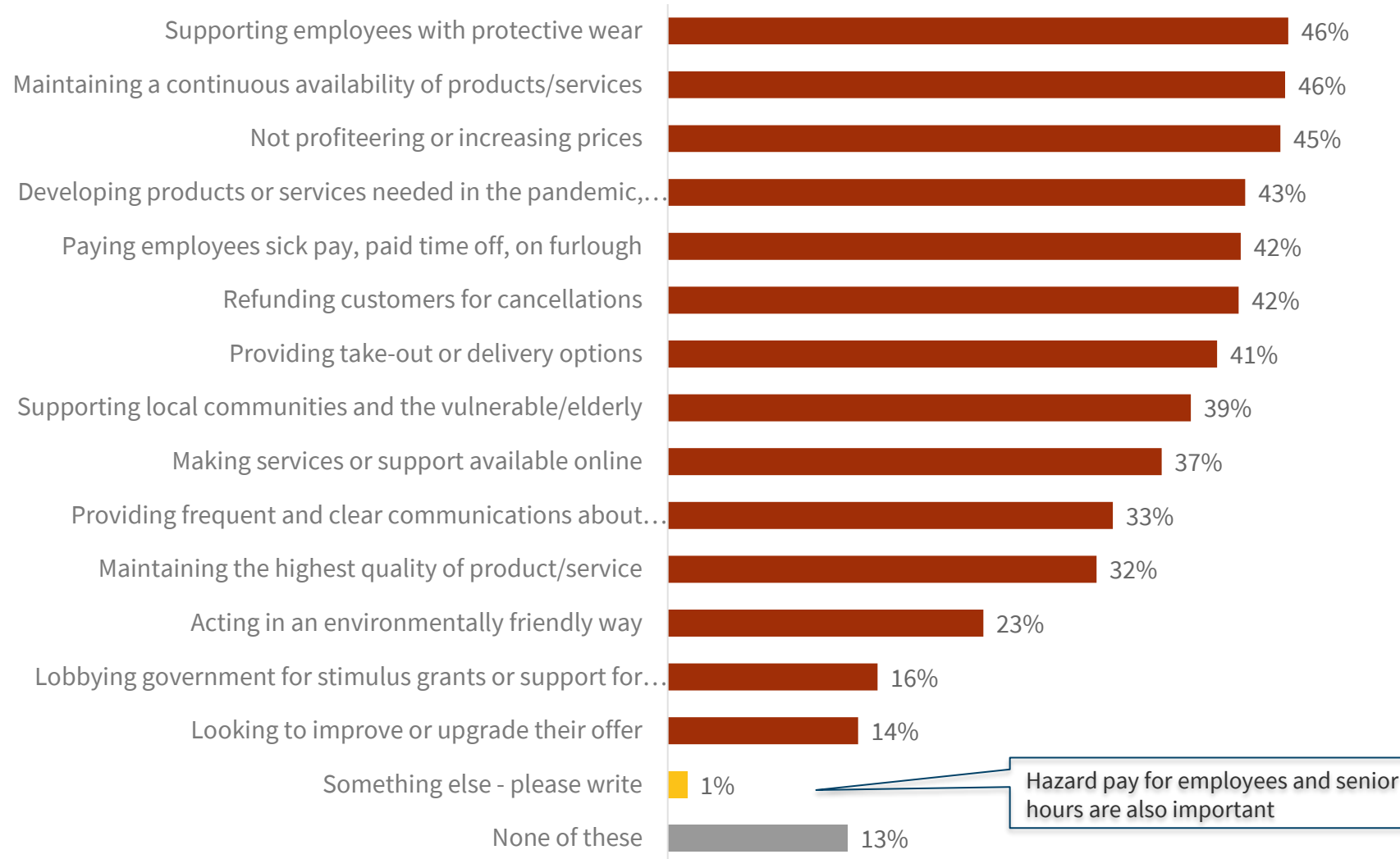
## Financials 45%

- Not profiteering or increasing prices



Q15. During the pandemic, which company or brand actions are most important to you? (Netted)

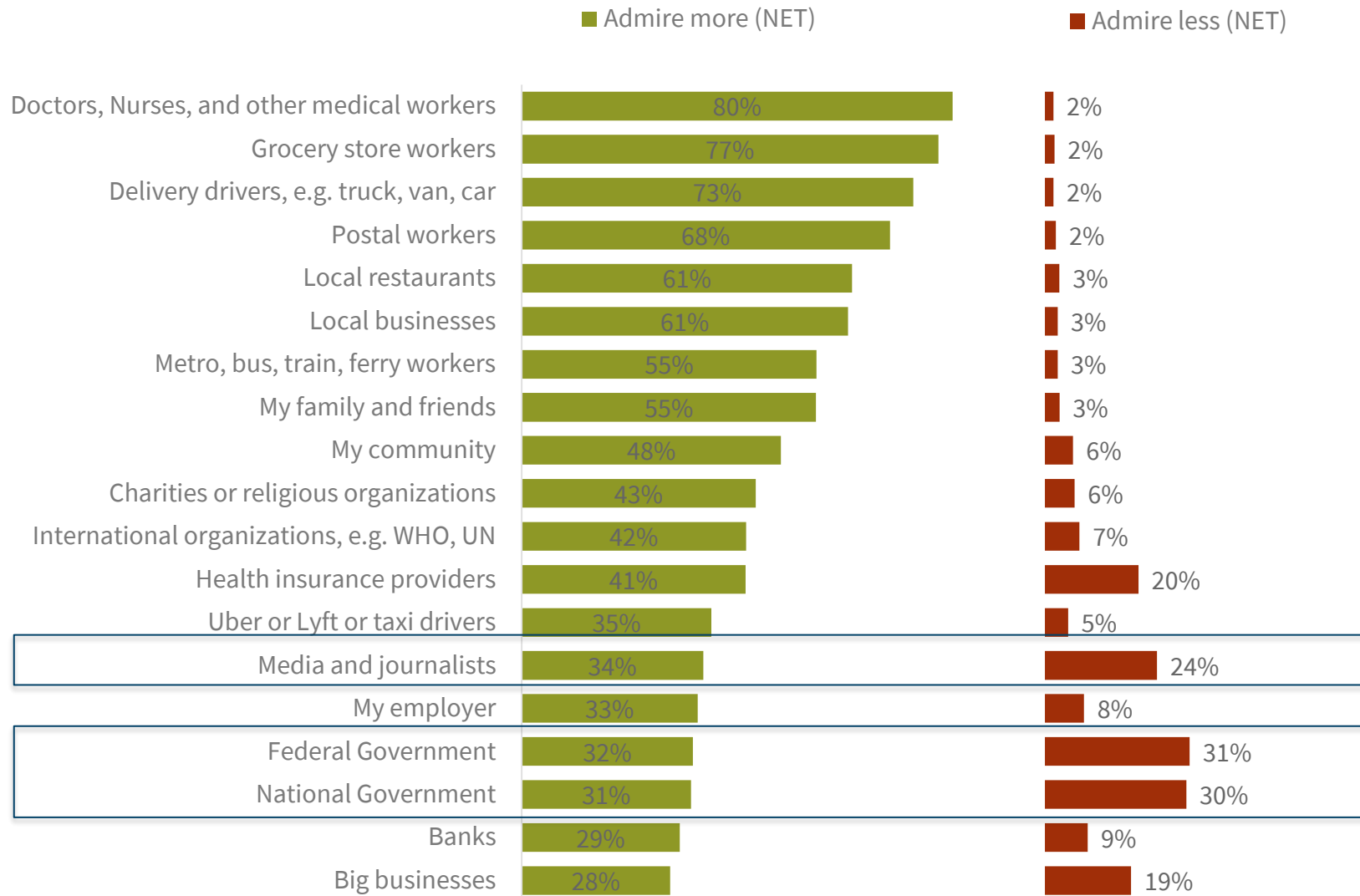
# Protecting your people, keeping the business running, and not profiteering are ways to protect brand reputation during the pandemic.



Q15. During the pandemic, which company or brand actions are most important to you?

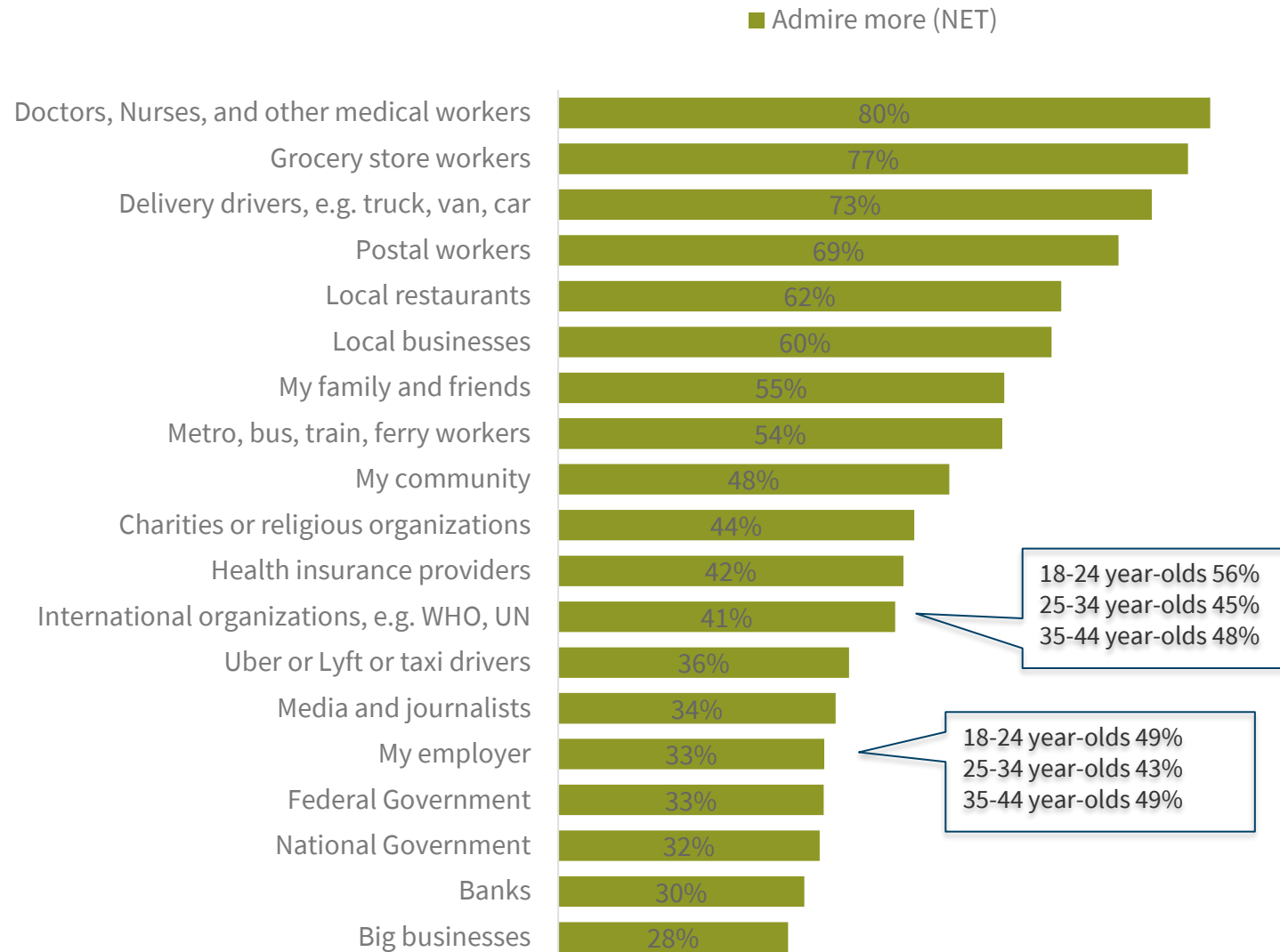
# Admiration for front line workers has significantly increased

Admiration for the Government and Media sees more movement as some admire more and some less



Q17. In the last month, how has your respect and admiration changed for the following workers or organizations?

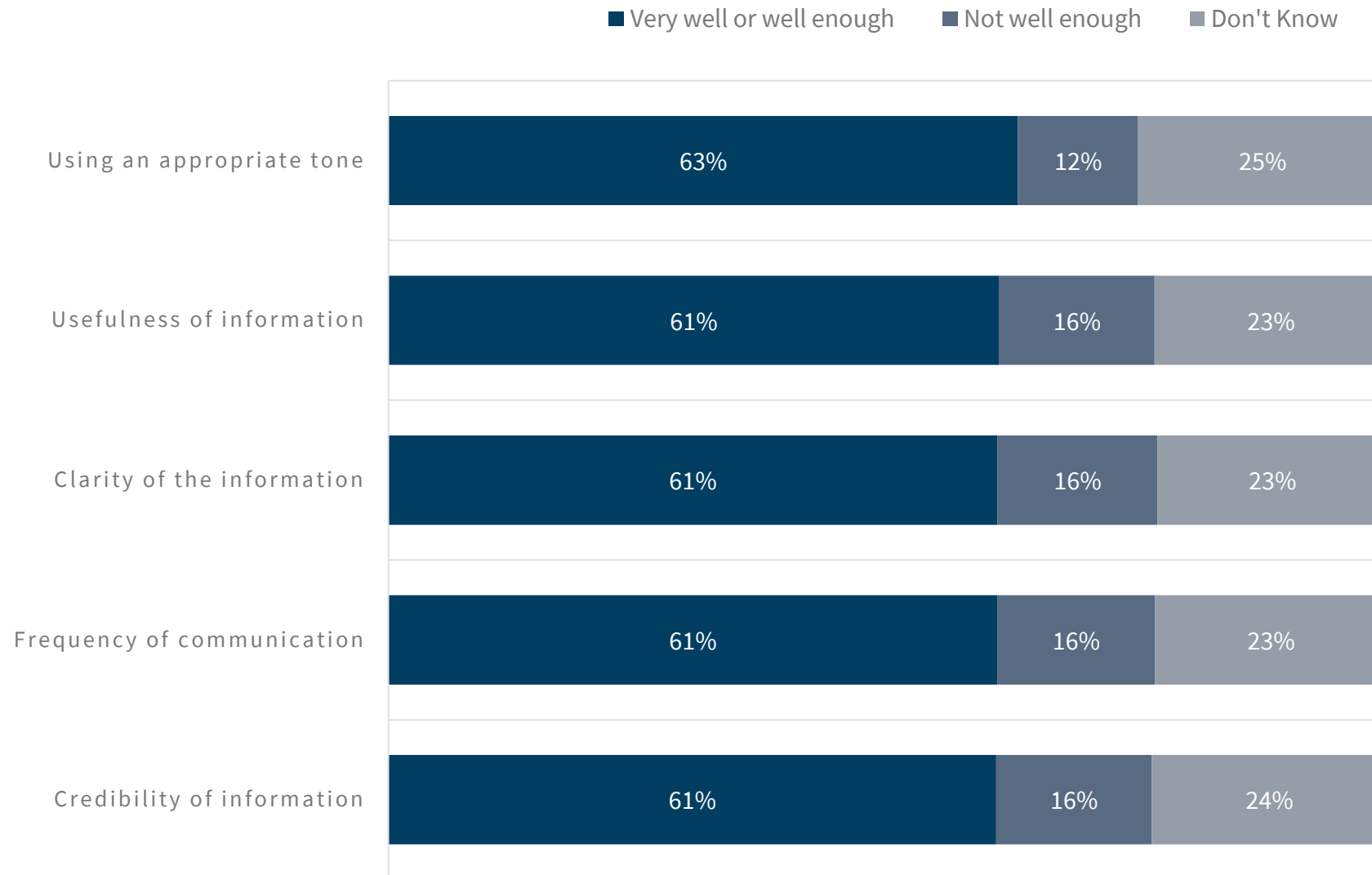
# Younger generations have more admiration for their employers and international organizations



Q17. In the last month, how has your respect and admiration changed for the following workers or organizations?



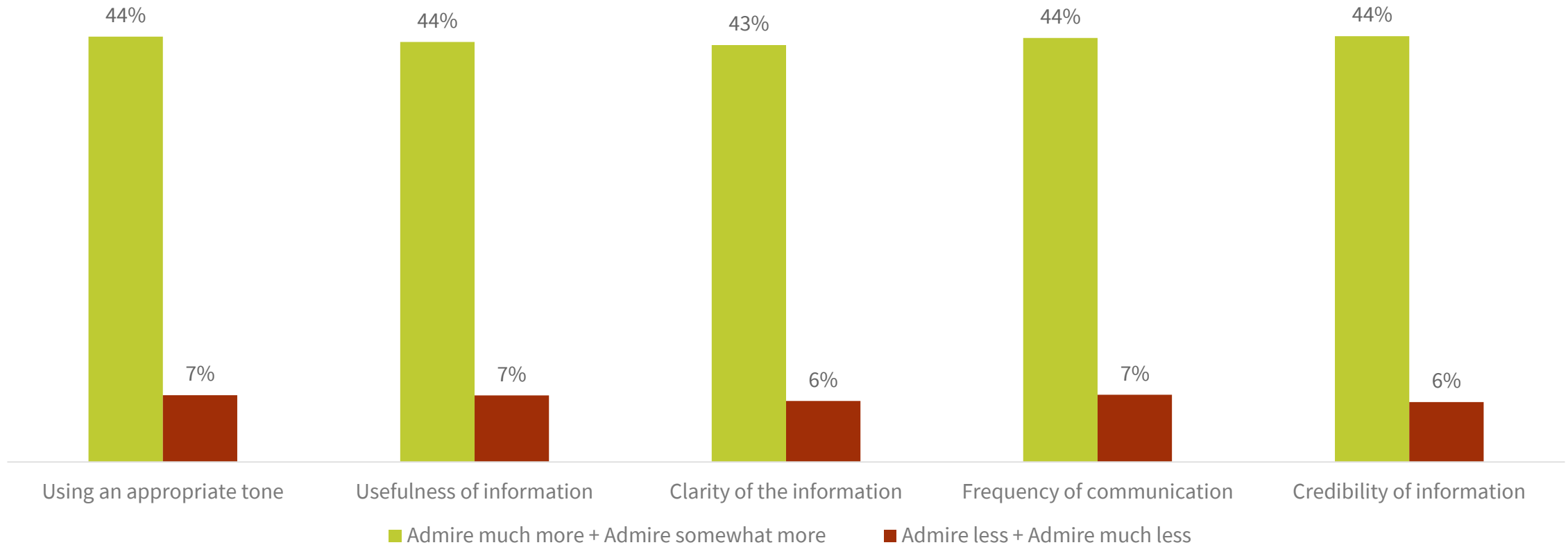
# Employers have been mostly using an appropriate tone and communicating useful information



Q21. For the following factors, how well do you think employers have been communicating with their employees about the Coronavirus epidemic?

# ~44% of those who say their employer has communicated well during the pandemic say that their admiration for their employer has increased.

Percent saying their admiration has increased or decreased for their employer by those who think their employer has done well in each communication category



Q17. In the last month, how has your respect and admiration changed for the following workers or organizations?

Q21. For the following factors, how well do you think employers have been communicating with their employees about the Coronavirus epidemic?

# Appendix

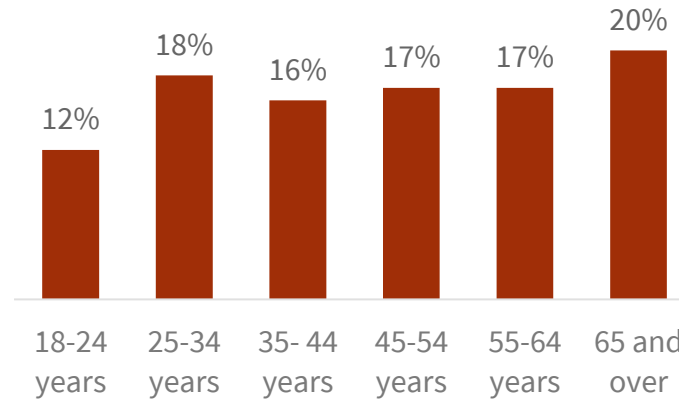
# Methodology

Using the Reputation Leaders ThoughtBite framework we ran an US national online study from April 20-21, 2020 among 1,000 US adults aged 18 and over, matching the demographic profile of the US according to the latest census statistics.

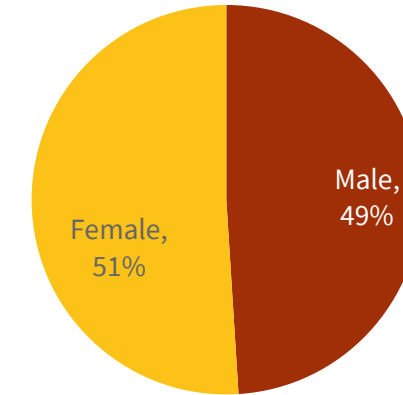
The US data is weighted to US national census on age, gender and region.

The survey was conducted using the fieldwork panel of Dynata US Regions are based on the US census 4 region split by state

Age by decile



Gender



Region

