

COVID-19 CONSUMER RESEARCH WAVE 2 EXECUTIVE SUMMARY

March 14-15, 2020

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.

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 Linder + The MDC Family
Global Chief Marketing Officer, EVP



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)?

Questions?

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