

THE IMPACT OF COVID-19

CONSUMER AWARENESS, PRECAUTIONS, AND BEHAVIORS

In March 2020, Burke conducted a survey to better understand the impact of novel coronavirus (COVID-19). The following outlines how COVID-19 is affecting day-to-day life in America.



AWARENESS

As of late March, this study determined that less than 1% of respondents had an immediate family member diagnosed with COVID-19, or had themselves been diagnosed. In fact, **90% do not personally know anyone diagnosed with the virus**. Despite this limited firsthand experience, most still consider themselves to be highly informed about COVID-19.

WHO FEELS INFORMED?



OF CONSUMERS FEEL "HIGHLY INFORMED" ABOUT COVID-19.

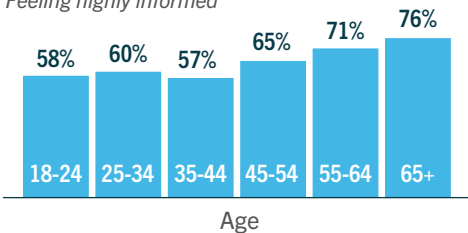


OF "HIGH-RISK" INDIVIDUALS FEEL "HIGHLY INFORMED". (VS. 59% NOT "HIGH-RISK")

This category includes older people and those with compromised health.

PERCEPTIONS OF BEING "HIGHLY INFORMED" ALSO INCREASE WITH AGE.

% Feeling highly informed



WHO FEELS CONCERNED?

OVERALL, PEOPLE FEEL MORE CONCERNED THAT A FAMILY MEMBER WILL CONTRACT THE VIRUS OVER THEMSELVES.



OF ALL PEOPLE ARE CONCERNED THEY WILL CONTRACT THE VIRUS.

Concern is greater (45%) amongst those who feel "highly informed".

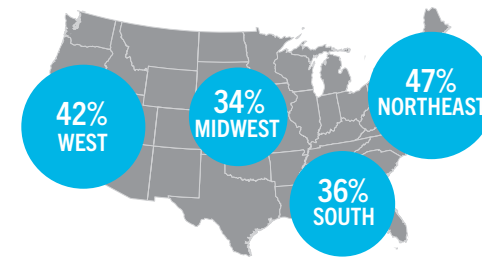


OF ALL PEOPLE ARE CONCERNED A FAMILY MEMBER WILL GET IT.

Concern here is also greater for those feeling highly informed (63%).

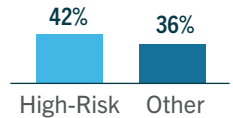
THOSE LOCATED IN REGIONS WITH MORE COVID-19 CASES OVERALL TEND TO BE MORE CONCERNED.

% Concerned about personally contracting COVID-19



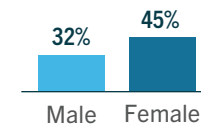
"HIGH-RISK" INDIVIDUALS ARE NOT MUCH MORE CONCERNED ABOUT GETTING THE VIRUS THAN THOSE LESS AT RISK.

% Concerned



WOMEN ARE MORE CONCERNED ABOUT CONTRACTING THE VIRUS THAN MEN, EVEN THOUGH MEN SEEM TO BE AT A HIGHER RISK.

% Concerned



"From Italy we're seeing another concerning trend. That the mortality in males seems to be twice in every age group of females."

Dr. Deborah Birx
White House Coronavirus Response Coordinator

SOURCE: <https://www.cnn.com/2020/03/24/health/coronavirus-gender-mortality-intl/index.html>

STAY HOME

Influencers across the board should continue to emphasize staying home, as well as the fact that even though younger people face a better prognosis, they can still spread the virus to more vulnerable loved ones (even if asymptomatic).

SOURCE: March 2020 Burke, Inc. Omnibus Study

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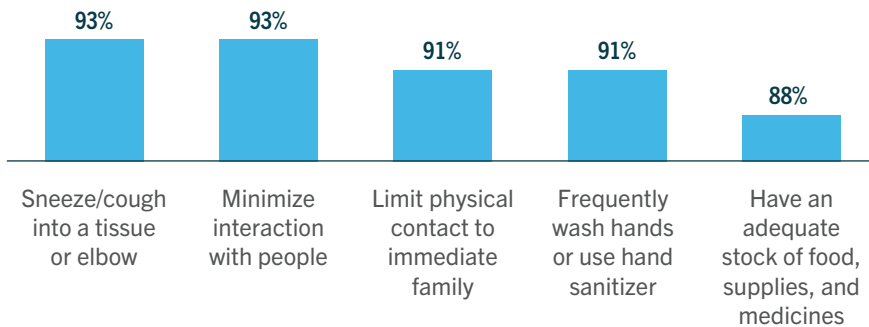


PRECAUTIONS

The *Center for Disease Control (CDC)* has set specific guidelines for staying well, and actions to take when feeling ill.

MANY ARE ABIDING BY FUNDAMENTAL CDC GUIDELINES, AND HAVE ALSO DONE SOME PREP FOR STAYING AT HOME.

SOURCE: <https://www.cdc.gov/coronavirus/2019-ncov/index.html>



HOWEVER, FEW PEOPLE AT THIS POINT HAVE CREATED A STRATEGIC PLAN OF ACTION RELATED TO COVID-19.

- 33% Have identified a room for infected household members
- 29% Have created a household plan of action for the virus
- 25% Have created an emergency contact list
- 18% Have discussed planning with neighbors

SURPRISINGLY, THOSE NOT DEEMED HIGH-RISK ARE JUST AS LIKELY AS "HIGH-RISK" INDIVIDUALS TO HAVE CREATED A PLAN.

Have identified a room for infected household members

High-Risk 32% Other 34%

Have created an emergency contact list

High-Risk 25% Other 26%



BEHAVIORS (IF POTENTIALLY INFECTED)

If they experienced fever, cough, or shortness of breath and suspect they may have the virus, **3 in 4 respondents would take appropriate actions consistent with CDC guidelines**, such as self-quarantine, calling their doctor's office, or scheduling a virtual visit. **1 in 4 would take an action that could put front line staff and other patients at higher risk of contracting the novel coronavirus**, such as going to their local emergency room, visiting an urgent care facility, or going to their doctor's office or a retail clinic.

INCIDENCE OF CDC ADVISABLE BEHAVIORS

- 53% Would self-quarantine to see whether symptoms improve or get worse
- 51% Would call their Primary Care Physician's office
- 16% Would schedule a video or virtual visit with a healthcare professional



People with higher annual household incomes (\$75k+) are most likely to schedule a video or virtual visit with a healthcare professional.



More women than men would visit the Emergency Room (12%).

INCIDENCE OF NON-ADVISABLE BEHAVIORS

- 9% Visit their local Emergency Room
- 9% Visit an Urgent Care facility
- 9% Visit their Primary Care Physician's office



People in the West are the least likely to go to the Emergency Room (5%).



More high-risk individuals would call their primary care provider (63%), especially those 65+.



OVERARCHING THOUGHTS

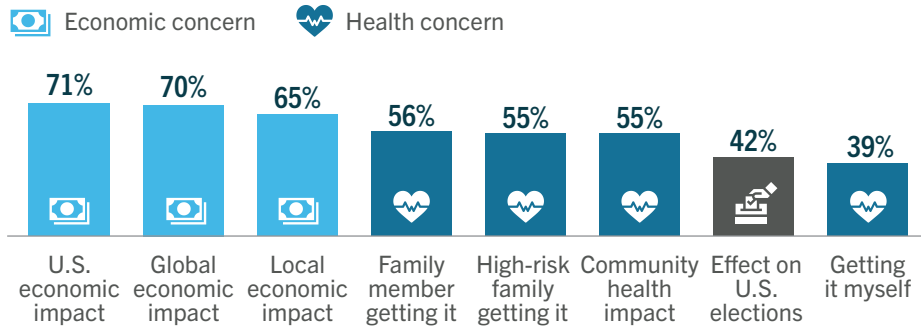
Healthcare providers should *continue to reinforce correct behaviors among those who are less informed* to help prevent further spread.

SOURCE: March 2020 Burke, Inc. Omnibus Study

THE IMPACT OF COVID-19 ON CONSUMER BEHAVIOR

In March 2020, Burke conducted a survey to better understand the impact of novel coronavirus (COVID-19). COVID-19 has undoubtedly impacted consumer behavior out of the gate. Some suspect behaviors could be impacted permanently, while others hypothesize we will quickly get back to many “pre-COVID” patterns when the veil has lifted. No matter the outlook, all are curious to understand what will be the “new normal.”

ECONOMIC CONCERNS CURRENTLY OUTPACE HEALTH CONCERNS.



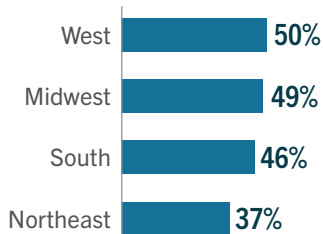
There is concern for *what exactly will change and for how long*. As we continue to live with restrictions, many economic realities will also emerge.

COVID-19 IS ALREADY AFFECTING SOME AREAS OF THE ECONOMY, ALTHOUGH POSSIBLY NOT AS MANY AS ONE MIGHT THINK.

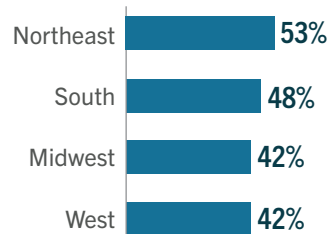
Some suspect *consumer behaviors could be impacted permanently*, while others hypothesize we will quickly get back to many “pre-COVID” behavior patterns.

HERE IS WHAT WE ARE SEEING TODAY:

46% of people report their ordering take-out/curbside options at local restaurants is up, with the Northeast trailing other regions.

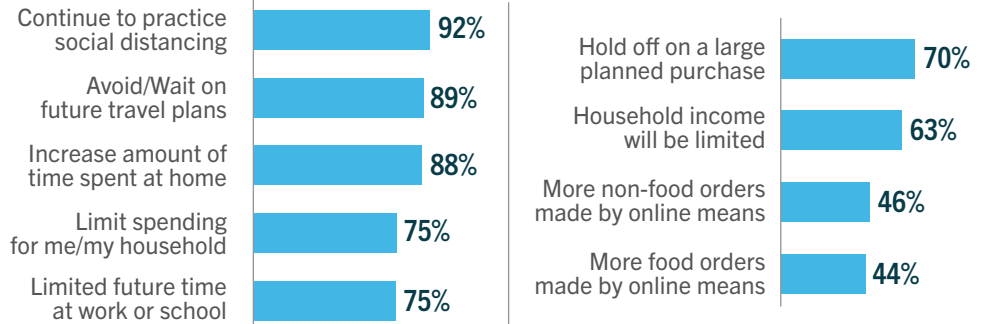


46% of people report increasing their amount of non-food purchases online, with the most residing in the Northeast.



SOURCE: March 2020 Burke, Inc. Omnibus Study

THE COVID-19 OUTBREAK IS EXPECTED TO HAVE A SIGNIFICANT IMPACT ON INDIVIDUAL BEHAVIORS INTO THE FORESEEABLE FUTURE.



USE OF TECHNOLOGY IS INCREASING DRAMATICALLY ACROSS THE BOARD.

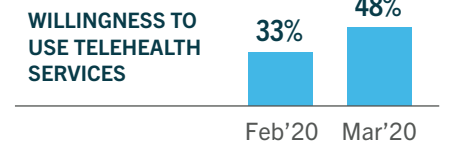
Streaming services are projecting the highest increase, though video is also making strides due to facilitating remote communication between family, friends and coworkers.

% WHO HAVE INCREASED USAGE

- 53%** Streaming TV shows, movies, etc. on devices at home
- 38%** Using video chat (e.g., FaceTime, Skype) to stay in touch with family or friends
- 36%** Participating in video meetings via video (e.g., Microsoft Teams, Zoom)
- 32%** Pre-ordering food online/by app from a restaurant for pickup
- 24%** Streaming at-home workouts or exercise classes



Advancements in technology plus a forced need are also changing the **healthcare industry**. Research shows a significant increase in **willingness to use telehealth services**, which could become a “new normal” behavior. The time is ripe for healthcare to **invest in digital tools** and keep momentum going.



OVERARCHING THOUGHTS

We will likely see *higher spending on products and services consumers can access without leaving their homes*. For example, business travel and traditional schooling will likely be impacted by the surge of teleconferencing options and non-traditional instruction approaches.

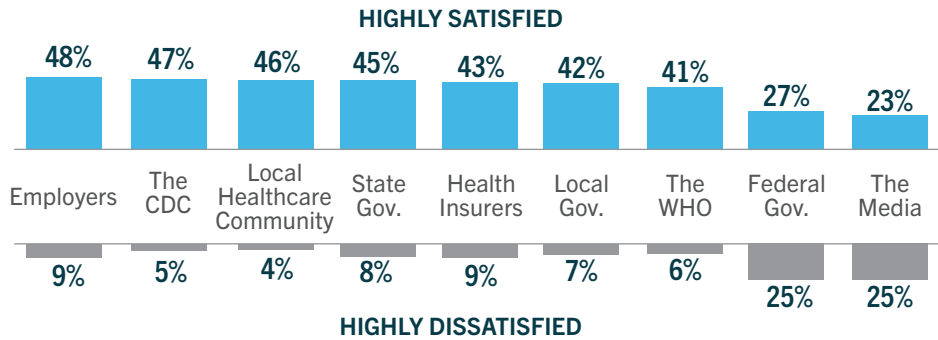
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PERCEPTIONS OF LEADERSHIP AND ECONOMIC EFFECTS

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MOST PEOPLE ARE ONLY MODERATELY SATISFIED WITH HOW DIFFERENT GROUPS HAVE HANDLED THE PANDEMIC.

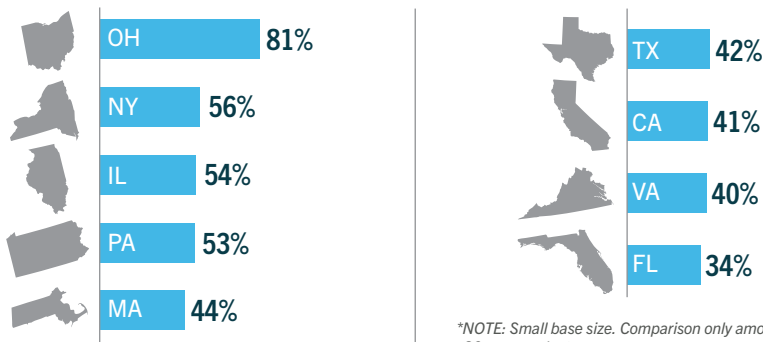
The *Media and Federal Government* stand out among this group by garnering lower levels of satisfaction and higher levels of dissatisfaction.



72% of people believe they are *personally most responsible* for protecting themselves from COVID-19. 13% consider the Federal Government most responsible.

SATISFACTION WITH STATE GOVERNMENT RESPONSE VARIES BY STATE*.

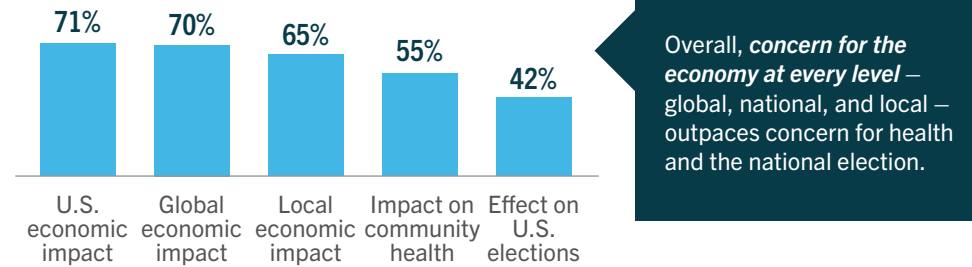
Ohioans gave their state government remarkably high scores. Governor Mike DeWine and Director of Health, Dr. Amy Acton, took early, measured steps to fight the outbreak.



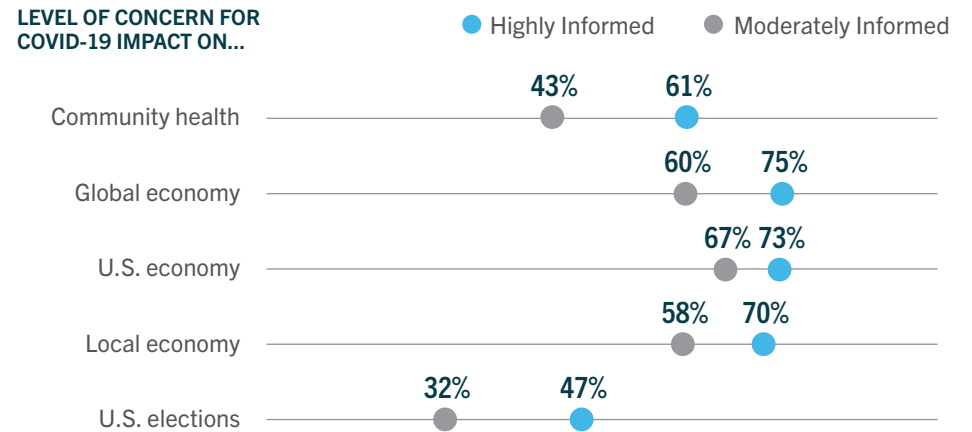
*NOTE: Small base size. Comparison only among states with 20+ respondents.

THERE ARE HIGH LEVELS OF CONCERN FOR COVID-19'S ECONOMIC IMPACT.

Despite being less concerned overall with the impact on elections, a considerable amount of people are still concerned with the impact COVID-19 may have on U.S. elections.



ACROSS THE BOARD, THOSE WHO FEEL MORE INFORMED ARE MORE CONCERNED ABOUT THE POTENTIAL IMPACTS.



OVERARCHING THOUGHTS

Given the volume of information to be consumed and the ever-changing landscape of this pandemic, *consumers are more tuned in than normal.* Consumers who feel more informed on the pandemic and its impacts tend to think the pandemic will have multiple negative effects on the economy, elections, and the community.

SOURCE: March 2020 Burke, Inc. Omnibus Study