The Coronavirus 2020 Crisis
US Consumer Sentiment Trend Report
March – April 2020
To better understand the impact COVID-19 is having on Americans, CI-Sonar developed an ongoing study to track US consumer sentiment.

- A total of 1,657 interviews have been conducted to date.
  - Consumers were recruited using a double opt-in panel company.
  - Survey traffic was carefully controlled to match the overall US population on age, gender and region.
  - Qualified respondents were US residents ages 18 and older.
- This study is conducted every 1-2 weeks beginning on March 13th.

This initial report covers interviews conducted throughout March and April 2020.

- March 13-14
- March 23-24
- March 31-April 2
- April 7-8
Coronavirus Familiarity

We know “a lot”.

- Most, but far from all, feel they know a lot about the coronavirus.
- Two-thirds report they know a lot, up from half three weeks ago.
- Still, one-third feel they only know a little.

Almost everyone is at least somewhat corona knowledgeable. Only 2% “only know the name.”

Familiarity with COVID-19
(among US adults 18+)

<table>
<thead>
<tr>
<th>Date</th>
<th>Know a lot</th>
<th>Know a little</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 14th</td>
<td>46%</td>
<td>51%</td>
</tr>
<tr>
<td>March 28th</td>
<td>67%</td>
<td>31%</td>
</tr>
<tr>
<td>April 4th</td>
<td>67%</td>
<td>31%</td>
</tr>
<tr>
<td>April 11th</td>
<td>67%</td>
<td>31%</td>
</tr>
</tbody>
</table>

Base: Total n482-358
Q3: How familiar are you with coronavirus disease 2019 (COVID-19)?
Worried, but not panicked.

- Most Americans are worried, or at least nervous.
- Few are on the extremes. Only 3% are panicked while 16% are calm.

**Current Anxiety Level About COVID-19**
(among US adults 18+ who have heard of COVID-19)

- 16% Calm
- 21% Nervous
- 46% Worried
- 15% Fearful
- 3% Panicked

For the week ending April 11, 2020
A month ago we were calm/nervous. Now we are worried.

- Over time, people are becoming more worried and less calm.
- Still, most are stopping short of fearful/panicked (only 18%).

**COVID-19 Anxiety Level**

(among US adults 18+ who have heard of COVID-19)

Base: Heard of coronavirus n481-350
Q5: All things considered, what is your anxiety level about the coronavirus disease 2019?

<table>
<thead>
<tr>
<th>Date</th>
<th>Calm/Nervous</th>
<th>Worried</th>
<th>Fearful/Panicked</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 14th</td>
<td>59%</td>
<td>31%</td>
<td>9%</td>
</tr>
<tr>
<td>March 28th For the week ending</td>
<td>42%</td>
<td>39%</td>
<td>19%</td>
</tr>
<tr>
<td>April 4th</td>
<td>43%</td>
<td>37%</td>
<td>21%</td>
</tr>
<tr>
<td>April 11th</td>
<td>46%</td>
<td>36%</td>
<td>18%</td>
</tr>
</tbody>
</table>
Women are more worried than men.

- A contributing factor may be traditional gender roles.
  - Women are traditionally more likely to be in charge of the family’s health care.
  - Women are also more likely to do the shopping, which can be a stressful activity.

![Current Anxiety Level Diagram](chart.png)

Current Anxiety Level
(among US adults 18+ who have heard of COVID-19)

- Calm/Nervous:
  - Male: 42%
  - Female: 31%
- Worried:
  - Male: 43%
  - Female: 45%
- Panicked/Fearful:
  - Male: 15%
  - Female: 23%

Combined weeks ending April 4, 2020 and April 8, 2020

Base: Heard of coronavirus; Males n425, Females n478
Q5: All things considered, what is your anxiety level about the coronavirus disease 2019?
Conservatives are less concerned.

- It will be interesting to see if this starts to change as the president and conservative media begin to tell a more serious message.
- Our next wave should have sufficient sample size to do a trend by political view.

**Current Anxiety Level**
(among US adults 18+ who have heard of COVID-19)

- **Calm/Nervous**: Liberal 30%, Middle 32%, Conservative 48%
- **Worried**: Liberal 45%, Middle 49%, Conservative 36%
- **Panicked/Fearful**: Liberal 25%, Middle 19%, Conservative 15%

Base: Heard of coronavirus; Liberal n231, Middle n397, Conservative n275
Q5: All things considered, what is your anxiety level about the coronavirus disease 2019?
The media might have it right.

- Back in mid-March, four-in-ten felt the media was exaggerating.
  - That has dropped to 28%.
- Very few feel that the media is underreporting.

Media’s Coverage
(among US adults 18+ who have heard of COVID-19)

- Underreporting: 13%
- Accurately reporting: 60%
- Exaggerating: 28%

For the week ending April 11, 2020

Base: Heard of coronavirus n422
Q8: Which of the below best describes your opinion of the media’s coverage of coronavirus disease 2019? The news media in the US...
Conservatives are far more likely to feel the media is exaggerating.

- Given that they are less concerned about COVID-19, it is logical that they would think the media is overblowing the risk.
- Liberals overwhelmingly feel that the media is accurate.

### Media’s Coverage

(among US adults 18+ who have heard of COVID-19)

- **Underreporting**: Liberal 19%, Middle 13%, Conservative 8%
- **Accurately reporting**: Liberal 68%, Middle 64%, Conservative 48%
- **Exaggerating**: Liberal 13%, Middle 23%, Conservative 45%

Base: Heard of coronavirus; Liberal n=231, Middle n=397, Conservative n=275
Q8: Which of the below best describes your opinion of the media’s coverage of coronavirus disease 2019? The news media in the US...
The world is changing.

- Half have seen a change in their work situation.
- Note that many people were not working, especially older Americans who are more likely to be retired. Same goes for students.

**COVID-19 Impact on Work Situation**
(among US adults 18+)

- Current job at home, 23%
- Current job, fewer hours, 7%
- Different job, 2%
- Not working, 16%
- Other, 3%

For the week ending April 8, 2020

Base: Total n423
QN10A: Has your work situation changed due to coronavirus?
QN10B: How has your work situation changed?
There are more than just changes at work.

- Social distancing has become ubiquitous.
- Most have stocked up on food.
- Most have not changed their financial investments.

### Household Actions Taken Because of COVID-19

(among US adults 18+ who have heard of COVID-19)

<table>
<thead>
<tr>
<th>Action</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social distancing</td>
<td>88%</td>
</tr>
<tr>
<td>Stocked up on food/HH items</td>
<td>61%</td>
</tr>
<tr>
<td>Wearing PPE*</td>
<td>51%</td>
</tr>
<tr>
<td>Cancelled travel</td>
<td>39%</td>
</tr>
<tr>
<td>Changed financial investments</td>
<td>8%</td>
</tr>
</tbody>
</table>

*Personal protective equipment such as facemasks or gloves

Base: Heard of coronavirus n423
Q9: Which of the below actions have you/your household taken because of coronavirus disease 2019?
Social distancing topped out in early April.

- Wearing PPE has just kicked in. We are watching to see if it continues to increase.
- Stocking up on food appears to have peaked. It will be interesting to see if it starts to decline as most pantries should be loaded (except hand sanitizer, disinfecting wipes, and toilet paper).

Base: Heard of coronavirus n482-350
Q9: Which of the below actions have you/your household taken because of coronavirus disease 2019?
Conservatives: stock up, but forget the masks.

Conservatives may be stocking food not in fear of the virus, but in fear of a food shortage caused by all the pantry loading.

### Household Actions
(among US adults 18+ who have heard of COVID-19)

<table>
<thead>
<tr>
<th>Action</th>
<th>Liberal</th>
<th>Middle</th>
<th>Conservative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stock up</td>
<td>67%</td>
<td>60%</td>
<td>64%</td>
</tr>
<tr>
<td>Avoid social</td>
<td>42%</td>
<td>36%</td>
<td>29%</td>
</tr>
<tr>
<td>Wear mask</td>
<td>38%</td>
<td>36%</td>
<td>32%</td>
</tr>
</tbody>
</table>

Combined weeks ending April 4, 2020 and April 11, 2020

Base: Heard of coronavirus; Liberal n232, Middle n398, Conservative n275
Q9: Which of the below actions have you/your household taken because of coronavirus disease 2019?
Actions Taken

Women are a little more cautious. ▪ But both genders are adjusting their lives.

**Household Actions Taken**
( among US adults 18+ who have heard of COVID-19)

<table>
<thead>
<tr>
<th>Action</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wash hands</td>
<td>88%</td>
<td>89%</td>
</tr>
<tr>
<td>Wear face mask</td>
<td>58%</td>
<td>68%</td>
</tr>
<tr>
<td>Practice home</td>
<td>33%</td>
<td>38%</td>
</tr>
</tbody>
</table>

Base: Heard of coronavirus; Males n425, Females n478
Q9: Which of the below actions have you/your household taken because of coronavirus disease 2019?
Older Americans are a little more likely to take action.

- Still, given they’re at higher risk, one might expect older adults would have a larger reaction.

**Household Actions Taken**

(among US adults 18+ who have heard of COVID-19)

<table>
<thead>
<tr>
<th>Action</th>
<th>Younger (18–49)</th>
<th>Older (50+)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Younger</td>
<td>84%</td>
<td>92%</td>
</tr>
<tr>
<td>Older</td>
<td>64%</td>
<td>63%</td>
</tr>
<tr>
<td>Younger</td>
<td>63%</td>
<td>32%</td>
</tr>
<tr>
<td>Older</td>
<td>32%</td>
<td>38%</td>
</tr>
</tbody>
</table>

Base: Heard of coronavirus; Ages 18-49 n453, Ages 50+ n452
Q9: Which of the below actions have you/your household taken because of coronavirus disease 2019?
Actions Taken

Homemade masks are in.
- Still, many have obtained disposable surgical masks.

PPE* Worn Because of COVID-19
(among US adults 18+ who have heard of COVID-19)

For the week ending April 11, 2020

Homemade masks are in.
Still, many have obtained disposable surgical masks.

Base: Wears facemask or personal protective equipment in public places n214
QN9A: What kind of personal protective equipment do you wear due to coronavirus?

*Personal protective equipment such as facemasks or gloves
The federal government is not impressing.

- Instead, state governments are earning the highest praise.
- One-third of Americans don’t feel that any of the four are performing well.

**Government Handling of COVID-19**

*Top-two box on 5-pt scale: excellent/very good handling* (among US adults 18+ who have heard of COVID-19)

- President Trump: 32%
- US Federal Government: 29%
- State Government: 51%
- Local Government: 45%

For the week ending April 11, 2020

Base: Heard of coronavirus n422

Q6: How would you rate each of the below US government officials/groups in terms of their handling of coronavirus disease 2019?
State and local governments are trending up.

- Perceptions of both state and local governments are improving.
- Perception of the federal government is holding steady at less than one-third impressed.

**Government Handling of COVID-19**

*Top-two box on 5-pt scale: excellent/very good handling (among US adults 18+ who have heard of COVID-19)*

<table>
<thead>
<tr>
<th>Government</th>
<th>March 14</th>
<th>March 28</th>
<th>April 4</th>
<th>April 11</th>
</tr>
</thead>
<tbody>
<tr>
<td>President Trump</td>
<td>34%</td>
<td>32%</td>
<td>33%</td>
<td>32%</td>
</tr>
<tr>
<td>US Federal Government</td>
<td>28%</td>
<td>25%</td>
<td>30%</td>
<td>29%</td>
</tr>
<tr>
<td>State Government</td>
<td>38%</td>
<td>43%</td>
<td>46%</td>
<td>51%</td>
</tr>
<tr>
<td>Local Government</td>
<td>37%</td>
<td>39%</td>
<td>39%</td>
<td>45%</td>
</tr>
</tbody>
</table>

Base: Heard of coronavirus n481-350

Q6: How would you rate each of the below US government officials/groups in terms of their handling of coronavirus disease 2019?
The federal response is polarized by party. ■ State government is more consistently high.

Government Handling of COVID-19

Top-two box on 5-pt scale: excellent/very good handling
(among US adults 18+ who have heard of COVID-19)

For the weeks ending April 4, 2020 and April 11, 2020

Base: Heard of coronavirus; Liberal n231, Middle n397, Conservative n275
Q6: How would you rate each of the below US government officials/groups in terms of their handling of coronavirus disease 2019?

Liberal  Middle  Conservative

- State government is more consistently high.

For the weeks ending April 4, 2020 and April 11, 2020
Younger folks are less impressed.

- Note that in this case, younger is up to 49 years old.
- Given that they are at a lower risk, some may feel the restrictions are too high.

**Government Handling of COVID-19**

*Top-two box on 5-pt scale: excellent/very good handling*  
(among US adults 18+ who have heard of COVID-19)

For the weeks ending April 4, 2020 and April 11, 2020

Base: Heard of coronavirus; Ages 18-49 n451, Ages 50+ n452

Q6: How would you rate each of the below US government officials/groups in terms of their handling of coronavirus disease 2019?
There is not a lot of confidence in health agencies.

- Almost one-third are not confident in any of the five organizations.
- People have the most faith in the CDC, which has a similar approval level as state governments.
- Note that people typically have a high level of faith in their personal doctor.
  - At less than half, people see this as beyond what their doctor can handle.

### Confidence in Agency to Manage COVID-19

*Top-two box on 5-pt scale: completely/very confident (among US adults 18+ who have heard of COVID-19)*

<table>
<thead>
<tr>
<th>Agency</th>
<th>Confidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>CDC (US Centers for Disease Control)</td>
<td>52%</td>
</tr>
<tr>
<td>Personal Doctor</td>
<td>48%</td>
</tr>
<tr>
<td>Local Hospitals</td>
<td>45%</td>
</tr>
<tr>
<td>WHO (World Health Organization)</td>
<td>36%</td>
</tr>
<tr>
<td>Pharmaceutical Companies</td>
<td>26%</td>
</tr>
</tbody>
</table>

For the week ending April 11, 2020

Base: Heard of coronavirus n422
Q7: How confident are you in each of the below in terms of their ability to successfully control coronavirus?
Older folks are more confident in every agency except the WHO.

Younger folks are not only less confident in government agencies, but also health agencies.

Confidence in Agency to Manage COVID-19

*Top-two box on 5-pt scale: completely/very confident*

(among US adults 18+ who have heard of COVID-19)

- CDC: Ages 18-49: 55%, Ages 50+: 51%
- Health agencies: Ages 18-49: 47%, Ages 50+: 40%
- None of these: Ages 18-49: 31%, Ages 50+: 28%

For the weeks ending April 4, 2020 and April 11, 2020

Base: Heard of coronavirus; Ages 18-49 n451, Ages 50+ n452

Q7: How confident are you in each of the below in terms of their ability to successfully control coronavirus?
Liberals trust the WHO, conservatives trust everyone else.

- Conservatives are particularly more likely to trust pharmaceutical companies than liberals.

Confidence in Agency to Manage COVID-19

*Top-two box on 5-pt scale: completely/very confident*
(among US adults 18+ who have heard of COVID-19)

Base: Heard of coronavirus; Liberal n231, Middle n397, Conservative n275
Q7: How confident are you in each of the below in terms of their ability to successfully control coronavirus?

For the weeks ending April 4, 2020 and April 11, 2020
Thank You.

Want to explore more? Go Deeper.

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