

COPING WITH COVID-19

WHAT AMERICANS NEED, FEEL AND FEAR ABOUT THE CORONAVIRUS PANDEMIC

REPORT BRIEF 2
APRIL 15, 2020

RESEARCH BY



POWERED BY



Introduction

Since its initial reporting on December 31, 2019, the COVID-19 outbreak has continued to spread at a terrifying rate. Earlier in the pandemic, efforts from the Ad Council, in partnership with the CDC, the U.S. Department of Health and Human Services and the White House, were focused around a single message: Slow the Spread. Now that significant impacts of the virus are arising around the country, the Ad Council has shifted its focus to address the urgent, varied needs of Americans triggered by this crisis.

This research study is an ongoing exploration into the ever-changing conversations, questions and fears around the pandemic. At the time of this second report, the global number of confirmed coronavirus cases is nearly 2 million, with around 125,000 deaths worldwide¹—figures that have increased exponentially in just the span of a week. The United States has topped the list of confirmed cases since the end of March, and now totals around 600,000 (a number that is potentially much higher, due to the lack of widespread available testing).

In the last week alone, the unemployment rate has reached (and is soon to surpass) the worst since the Great Depression,² and businesses and schools across the country continue to shutter their doors as “stay at home” orders endure, in all or in part, in all but five states nationwide.³

As the pandemic continues, leaders from federal and local governments, issues experts and lead scientists are making daily appeals to the American public. The Ad Council’s research began in early April to address: Are the resources and reassurances they’re providing really meeting the nation’s needs?

Through social listening analysis and a weekly survey (quantitative inquiry), this ongoing

study seeks to discover what Americans really need—by directly asking them about those needs as well as identifying where they are getting information about COVID-19 to address their own mental, social and economic challenges.

The goals of this research are to:

- Identify areas of greatest need as expressed in social media conversations/posts and as reported by a survey sample representing the American public;
- Clarify the correlation and connection between social media conversations and the real needs of the American public;
- Provide weekly guidance to issue experts, brands, foundations, the media and causes about the American public’s greatest needs;
- Identify outlets, entities and influencers where the American public is getting their information regarding COVID-19; and
- Provide insights to stakeholders in order to make strategic decisions regarding how and where to reach Americans with messages that address their needs and concerns.

As the month of April continues to unfold, the American public is facing the beginning of a particularly difficult time. A record number of people dealing with the hardships of unemployment and are struggling to make rent/mortgage payments, afford meals, and more. And as isolation orders continue, many more are struggling with mental health issues. Ultimately, the goal of this research is to identify the greatest needs of Americans, and to help those with the most resources—brands, foundations, the media and causes—make strategic decisions in their efforts to address the impact of COVID-19 on the American public.

This report brief marks the second week that the Ad Council is releasing research that highlights the top conversations/findings as they evolve during this time.

1. <https://www.nytimes.com/interactive/2020/world/coronavirus-maps.html>

2. <https://www.washingtonpost.com/business/2020/04/09/66-million-americans-filed-unemployed-last-week-bringing-pandemic-total-over-17-million/>

3. <https://www.nytimes.com/interactive/2020/us/coronavirus-stay-at-home-order.html>

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Methodology

The findings in this report are based on a mixed-method research approach: 1) social listening; and 2) quantitative online survey.

Method 1: Social Listening

Objective: This research method will uncover the ongoing COVID-19 conversations taking place online across the nation in order to identify the areas of greatest need and hone in on shifting social trends.

Details: Online conversations are captured on a weekly basis, starting on January 1, 2020, by way of Talkwalker, a leading social listening and analytics platform. Through a weekly review of query topics, defined social conversations observed within the areas of focus, the ongoing quantitative analysis seeks to uncover the sentiment and expressions behind American needs and interests.

Method 2: Quantitative Online Survey

Objective: This research method is designed to identify the areas of greatest need as expressed by online survey respondents representing the American public. The survey also sought to uncover how Americans are feeling amid the pandemic, what they're specifically worried about, what information they need, where they're getting COVID-19 information, and more.

This phase was also designed to validate findings from the social listening phase by clarifying the correlation and connection between the social conversation and the real needs of the American public.

Details: In partnership with C+R Research, a leading independent full-service marketing insights agency, the Ad Council surveyed a nationally representative population of 1,000 English-speaking adults ages 18+ across the United States, each week, online between April 3-5 and April 10-12 2020. This study was conducted to measure Americans' perceptions and needs as it relates to the outbreak of COVID-19.

The 10-minute survey was administered online, and the age, gender, ethnicity, region, household composition and income of respondents were matched to U.S. Census statistics. (Note: The margin of error for a sample of 1,000 respondents is +/- 3.1 percentage points at 95% confidence).

Demographic Profile

N= 1,000 respondents

Find details of the subgroups targeted at:
<http://covidresearch.adcouncilkit.org/>

Finding 1:

In general, Americans feel more informed, more hopeful and less worried than last week.

Overall this week, Americans were more likely to say they have "the right amount of information" about most categories, including when people need to quarantine (up 7% from week 1), how long to quarantine (up 6%), the current number of cases near them (up 6%), a respondent's risk of getting COVID-19 (up 6%), how to prevent getting the virus (up 5%), and more.

And since week 1, feelings of hope and relaxation significantly increased: In the past week, 43 percent of respondents reported feeling hopeful, compared to 38 percent in week 1; a third (33%) reported feeling relaxed, compared to 29 percent the previous week. However, a third of Americans still report feeling anxious (35%) or tired (33%).

This week, the same worries predominate for all Americans: the economy, the health of medical and other frontline workers, and people not taking COVID-19 seriously. However, despite slightly more people now knowing someone who has/had COVID-19 (up from 24% to 28%), Americans overall are significantly less worried this week than they were last week.

	week 1	week 2
• The economy:	69%	65%
• The health of medical/ frontline workers:	68%	64%
• People not taking COVID-19 seriously:	66%	60%
• The health of friends or family members:	53%	46%

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Finding 2:

The COVID-19 pandemic is having a significant impact on families.

The vast majority (81%) of Americans say they have been financially impacted at least a little by COVID-19 as of the second week of April 2020, and nearly one in four have experienced a very large financial impact. For family households, the impact is even greater: Nearly nine in ten (87%) respondents with kids under 18 in the household report a financial impact, compared to 77 percent of those without kids in the home. And nearly a third (28%) of respondents with family households report a large financial impact, compared to 21 percent of those without kids.

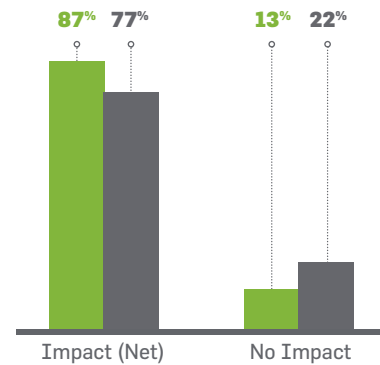
Parents report needing much more help than those without kids in the household. This holds true for both child and family-related categories like keeping the family entertained and engaging kids in educational activities—and in a general sense. For example, four in 10 parents (42%) report needing PPE like masks and/or gloves and peace of mind (40%)—compared to 27 percent and 24 percent of non-parents, respectively.

Parents much more affected financially

87% of family households (with children under 18) impacted at least a little versus 77% of non-family households.

(Question: How much of an impact has the COVID-19 pandemic had on you financially?)

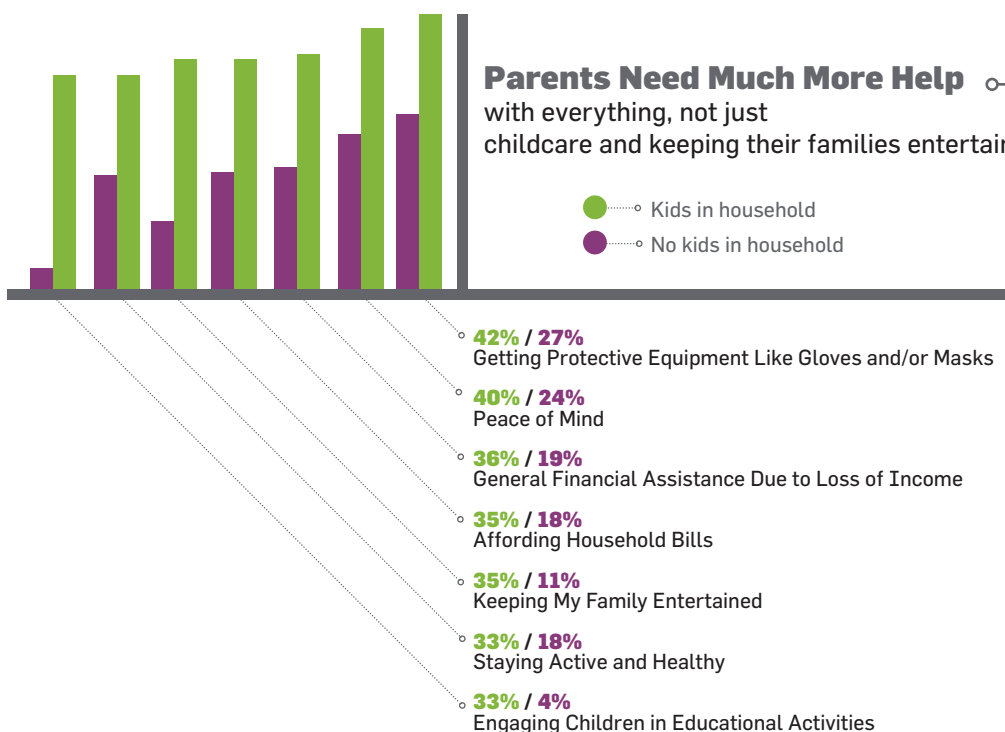
- Kids in household
- No kids in household



Parents Need Much More Help

with everything, not just childcare and keeping their families entertained

- Kids in household
- No kids in household



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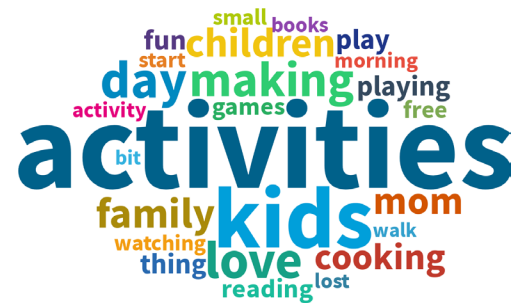
Parents are much more worried in general than people without kids in the household. This is true for the top three concerns of Americans (the health of medical/frontline workers, the economy, and people taking COVID-19 seriously), as well as all other categories, ranging from their financial situation and crime in their communities, to their children's education and long-term effects of the pandemic on their children.

In addition, parents are significantly more likely to feel anxious, tired and irritable than those without kids in the household. All respondents continue to rate gratitude as the top-most feeling, though stark differences can be seen for some of these more troubling emotions:

	kids in HH	no kids in HH
Anxious	69%	65%
Tired	68%	64%
Irritable	66%	60%
Isolated	53%	46%



Social media is a top platform for parents to discuss fun and educational activities for their children during quarantine. While some parents turn to online sources for advice and tips, others use their social presence to share recommendations. The majority of discussions occur on Twitter or on blogs, with parenting-specific blogs rising to the top. Most importantly, while only 2,200 posts specifically mentioned family activities during the past 30 days, over 15,000 engagements were seen across those posts, speaking to the eagerness of parents to exchange information.



Finding 3:

Younger Americans are the most financially impacted—and the most worried.

Young people ages 18-30 report the most financial impact so far (88%), and nearly one in three of this age group (30%) reports a large financial impact. Only 11 percent of younger Americans report no financial impact to date. In contrast, respondents ages 65+ report the least impact: 68 percent have been financially impacted in some way, with 17 percent reporting a large impact. A third (31%) of Americans ages 65+ have had no financial impact to date.

Top Emotions for 18-30
anxious, tired, grateful, isolated

Top Emotions for 31-44
grateful, anxious, tired, isolated

Top Emotions for 45-64
grateful, hopeful, optimistic, confident

Top Emotions for 65+
grateful, hopeful, relaxed, confident

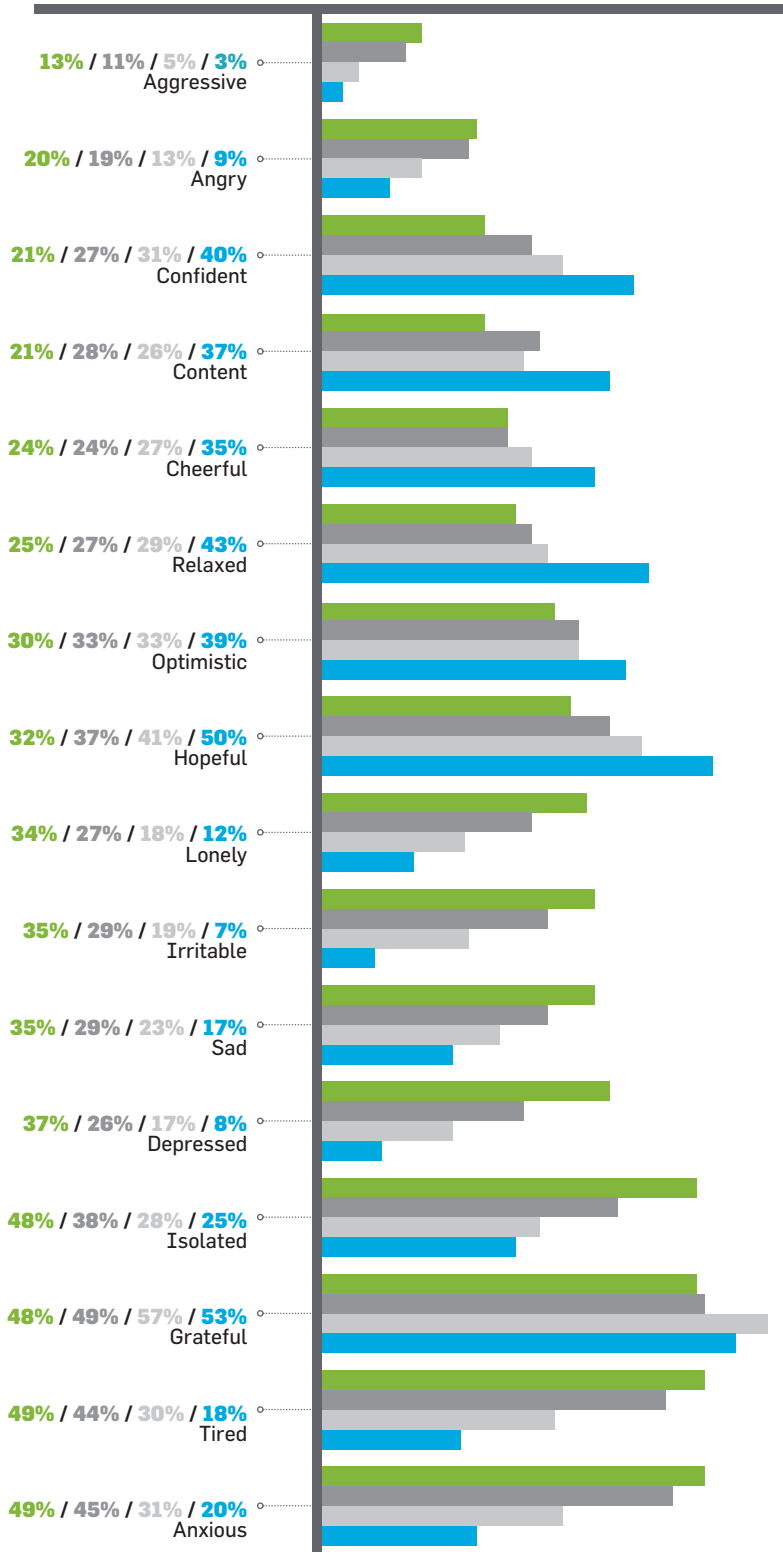
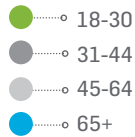
Younger people also report more immediate needs than those in older age groups. Four in ten respondents ages 18-30 (40%) and 31-44 (41%) report needing peace of mind, compared to 23 percent and 12 percent of those aged 45-64 and 65+, respectively. Getting access to PPE like masks and/or gloves has the least disparity between age groups—though respondents aged 18-44 still ranked higher on all needs compared to respondents aged 45+.

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Emotions Vary by Age

Youngest feeling most negative, oldest feeling most positive. Everyone is feeling grateful.



In online conversations, younger generations appear to be struggling most significantly as well. When looking at posts sharing feelings of worry and other negative emotions associated with COVID-19, 94 percent of mentions stem from those ages 18-34. While platform usage and generational habits play a role here as well, their struggle is unquestionable. To add a bit of context, the top emojis used by the 18-34 age group include the loudly crying face, the sad face, the pleading face, the ever-present face with tears of joy, and the upside-down face.



Despite the global uncertainties surrounding the pandemic, Americans are still overwhelmingly grateful. In fact, more than half (53%) of respondents report feeling grateful in the past week alone.

Those who reported feeling grateful in the past week are thankful for:

- 46%** The health and well-being of family, friends and loved ones
- 42%** Personal health
- 28%** Being able to quarantine/ socially distance with minimal struggles
- 25%** Healthcare workers and other essential workers
- 24%** Faith/religious/ spiritual practice and/or community

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Finding 4:

Lower income Americans have greater needs and more concerns related to COVID-19 than those at higher income levels.

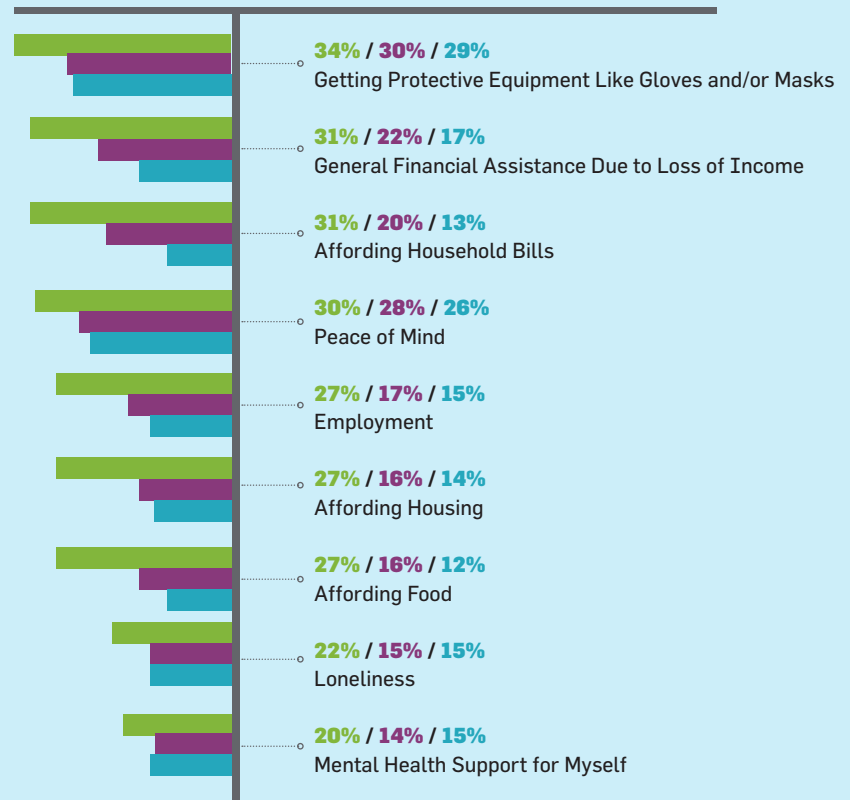
Americans who report an income of \$49.9k or less report drastically different needs than those with an income of \$100,000+.

Getting PPE like gloves and/or masks and peace of mind still rank as the top two needs for all respondents, but the amount to which items are needed greatly varies by income level. In third behind these two categories, high income Americans report needing assistance staying active and healthy (23%). Needs for low income Americans are greater across the board, and include categories like general financial assistance due to loss of income (31%), affording household bills (31%), food and housing (27% each)—as well as things like loneliness (22%) and mental health support (20%).

Lower income Americans are also significantly more tired, lonely and depressed than other respondents. For example, one in four (40%) of low income respondents report feeling tired in the past week, compared to one in three of those with middle (32%) and high (31%) incomes.

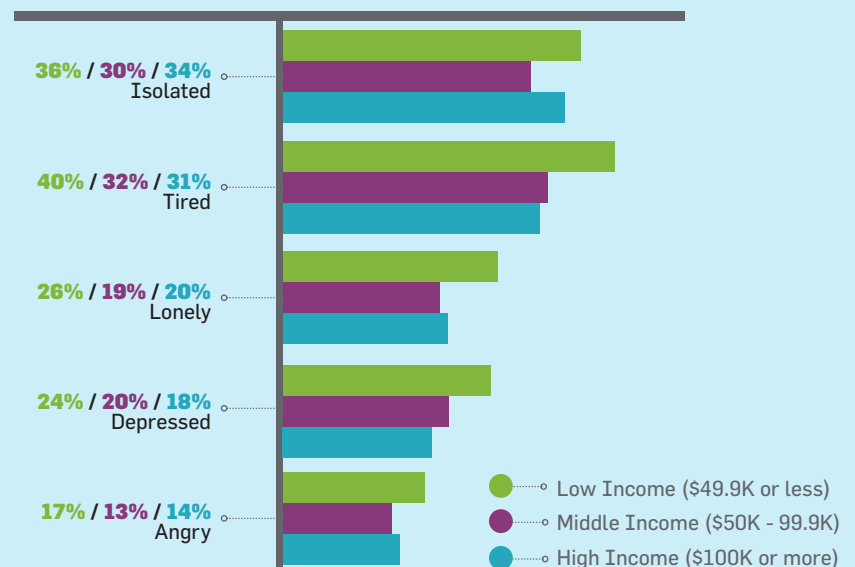
Concerns also vary by income level. Higher income Americans (\$100k+) are more worried about the economy and the health of frontline workers, compared to respondents earning lower incomes. Lower income Americans (\$49.9k or less) are more worried about crime, losing jobs, health and mental health, the ability to pay bills and more.

- Low Income (\$49.9K or less)
- Middle Income (\$50K - 99.9K)
- High Income (\$100K or more)



Emotions Vary by Income Level

Lower income Americans significantly more tired, lonely and depressed than others



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Finding 5:

Northeasterners are the most impacted, the most worried, and the most anxious.

Going into the second week of April 2020, the Northeastern region of the United States continues to be the hardest hit with the highest number of confirmed COVID-19 cases.⁴ Thirty-nine percent of respondents in the week 2 online survey report knowing someone who has/had COVID-19, nominally up from 38 percent in week 1. The likelihood of knowing someone who has/had the virus also increased slightly for Americans in the Midwest and South, from 23 to 26 percent in the Midwest, and 22 to 24 percent in the South.

However, the Western region saw the biggest jump: In the week 1 survey, fewer than one in five respondents (18%) knew someone who has/had the virus. This grew to nearly three in 10 (28%) in week 2.

Needs also continue to differ by region. The top two concerns of Americans in general are getting PPE like gloves/masks and peace of mind, though these needs are reported by many more Northeastern respondents than those in the Midwest:

- Getting PPE like gloves/masks: **34%** Northeast; **25%** Midwest
- Peace of mind: **34%** Northeast; **24%** Midwest

Other discrepancies between these two regions include:

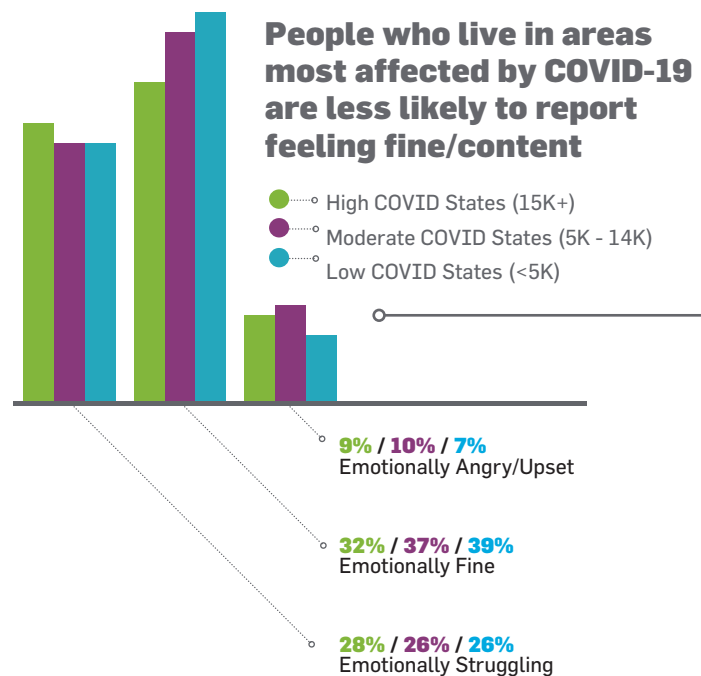
- Keeping up a sense of community: **23%** Northeast; **13%** Midwest
- Mental health support for members of my household: **19%** Northeast; **13%** Midwest
- Mental health support for myself: **20%** Northeast; **14%** Midwest

As the most affected area, the Northeast is more worried about a number of categories, compared to other regions:

- The health of medical/frontline workers (**70%**)
- The economy (**69%**)
- The health of friends/family (**57%**)

As the region most affected by the pandemic thus far, Northeasterners are more worried about the health of medical and other frontline workers (70%) compared to other regions, as well as the health (57%) and mental health (33%) of friends and family. They are the least worried of all regions about a spouse or partner losing his/her job (18%).

As of the week 2 survey, the Northeast is outpacing other regions as the most anxious, tired and isolated—while the South is the most confident, hopeful, optimistic, relaxed and grateful. In general, Americans who live in areas with fewer confirmed cases of COVID-19 feel more positive/content, compared to those who live in areas with the most confirmed cases (15,000+).



4. <https://www.nytimes.com/interactive/2020/us/coronavirus-us-cases.html>

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Conclusion

As the United States nears the peak of the COVID-19 pandemic,⁵ Americans from every corner of the country are feeling the impact in one way or another.

Certain populations are feeling the effects of the virus more than others. Geographically, the Northeast has been hit the hardest so far—in terms of cases, worries, concerns and more. Younger Americans are also taking a hit compared to older generations, as are parents and lower income Americans.

But in general, Americans are continuing to hold their heads high. Gratitude continues to top the list of emotions they're feeling, and hopefulness and relaxation are actually growing. Americans are feeling more informed and less worried than just a week ago.

As the pandemic continues, the Ad Council continues to ask: Will Americans' needs and worries change, and if so, how? Do those who are the most vocal online truly represent the needs of Americans who may not be finding their voices in social conversations? Are the resources and reassurances provided to the American public by leaders (like federal and local governments, issues experts and lead scientists) really meeting the nation's needs? How can brands, the media, causes and foundations adequately address these needs and support Americans when they need it most?

This is the second weekly research brief from the Ad Council that highlights the top conversations/findings as they evolve during this time. Find additional information and news on forthcoming reports at <http://covidresearch.adcouncilkit.org>.



About The Ad Council

The Ad Council has a long history of creating life-saving public service communications in times of national crisis, starting in the organization's earliest days during World War II to September 11th and natural disasters like Hurricane Katrina and Hurricane Sandy. Its deep relationships with media outlets, the creative community, issue experts and government leaders make the organization uniquely poised to quickly distribute life-saving information to millions of Americans.

The Ad Council is where creativity and causes converge. The non-profit organization brings together the most creative minds in advertising, media, technology and marketing to address many of the nation's most important causes. The Ad Council has created many of the most iconic campaigns in advertising history. Friends Don't Let Friends Drive Drunk. Smokey Bear. Love Has No Labels.

The Ad Council's innovative social good campaigns raise awareness, inspire action and save lives. To learn more, visit AdCouncil.org, follow the Ad Council's communities on Facebook and Twitter, and view the creative on YouTube.



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C+R Research is an independent full-service marketing insights agency with 60 years of experience delivering great research, deep perspective and committed client service. C+R is nationally recognized for its best-in-class quantitative and qualitative research methodologies and expertise with specific populations, including shoppers, youth & family, multicultural consumers, business professionals, and global communities. C+R is privately held and headquartered in Chicago, IL. For additional information, please visit www.crrresearch.com.