The twin public-health and economic crises are driving changes in consumer behavior that could have long-lasting effects. We surveyed consumers to better understand these changes.

Consumers are in limbo

- 49% Avoiding leaving their homes
- 50% Working from home partially or entirely
- 42% Avoiding public transportation when leaving home
- 57% Social distancing from friends and community

Source: PwC Survey of 1600+ adult consumers
Q1: While you are social distancing, are you using different transportation and travel resources than you used to?
Q2, 4: When you go out, what measures are you putting in place to protect yourself?
Q3: How has your working situation changed since COVID-19?

The cost of the crisis hits home

- 78% Economic cost (Unemployment, recession, hardship)
- 71% Human cost (Sickness and life lost)
- 51% Personal health
- 49% Personal financial well-being
- 48% Spreading the virus to family

Source: PwC Survey of 1600+ adult consumers
Q: How concerned are you about the following categories until social distancing ends?
Consumers are buying more essentials . . .

<table>
<thead>
<tr>
<th>Category</th>
<th>% Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-perishable groceries</td>
<td>+27%</td>
</tr>
<tr>
<td>Household &amp; cleaning supplies</td>
<td>+25%</td>
</tr>
<tr>
<td>Frozen food</td>
<td>+25%</td>
</tr>
<tr>
<td>Perishable groceries</td>
<td>+12%</td>
</tr>
<tr>
<td>Pet care</td>
<td>+11%</td>
</tr>
<tr>
<td>Personal care &amp; pharmacy</td>
<td>+11%</td>
</tr>
<tr>
<td>Non-alcoholic beverages</td>
<td>+8%</td>
</tr>
<tr>
<td>Baby &amp; infant products</td>
<td>+7%</td>
</tr>
<tr>
<td>Alcoholic beverages &amp; tobacco</td>
<td>+6%</td>
</tr>
</tbody>
</table>

. . . and taking advantage of shopping online

Source: PwC Survey of 1600+ adult consumers
Q1: How has your spending in the following categories changed since the COVID-19 social distancing orders have been put in place?
Answer shows percentage increase in spend.
Q2: How have your shopping behaviors changed from before COVID-19 as compared to the last two weeks?
Nesting at home means more leisure time

Significantly more time

- **Entertainment**
  - TV, movies, games
- **Watching/reading**
  - the news from any source
- **Hobbies**
  - Music, art, reading, gardening, etc.

Moderately more time

- **Cooking**
- **Social/Media**
  - social networks, news, online media
- **Household chores**
  - cleaning, laundry, etc.
- **Shopping online**
- **Physical fitness**

Source: PwC Survey of 1600+ adult consumers
Q: Please select up to three activities you have increased the most as a result of being more at home?

Changing priorities could have long-lasting effects

- **50%** Trying new brands/products
- **28%** Picking up new hobbies
- **56%** More invigorated approach to life
- **48%** Intend to maintain newly acquired health and wellness habits over the long term

Source: PwC Survey of 1600+ adult consumers
Q1: While we are social distancing, are you buying/consuming different grocery brands than you used to? Q2: Please select up to three activities you have increased the most as a result of being more at home? Q3: Overall, has this new situation encouraged you to take an invigorated approach to life? Q4: Do you think you will maintain some of these new health and wellness behaviors after social distancing ends?
Looking ahead

In response to a sudden public-health crisis, consumers are having to change how they live.

Those changes are profoundly influencing their buying behavior, from what they buy to how they buy it.

We have reason to believe certain fundamental shifts will have long-lasting effects.

Reach out to discuss the practical implications of these insights.

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Methodology: PwC survey to understand how 1600+ US adult consumers are adapting to today’s environment. We analyzed this consumer-reported data and overlaid findings with additional PwC research and analysis, to uncover insights relevant to consumer and retail companies.

Adult consumer age breakdown:

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>4%</td>
</tr>
<tr>
<td>25-40</td>
<td>26%</td>
</tr>
<tr>
<td>41-54</td>
<td>23%</td>
</tr>
<tr>
<td>55-64</td>
<td>20%</td>
</tr>
<tr>
<td>65 or above</td>
<td>26%</td>
</tr>
</tbody>
</table>

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