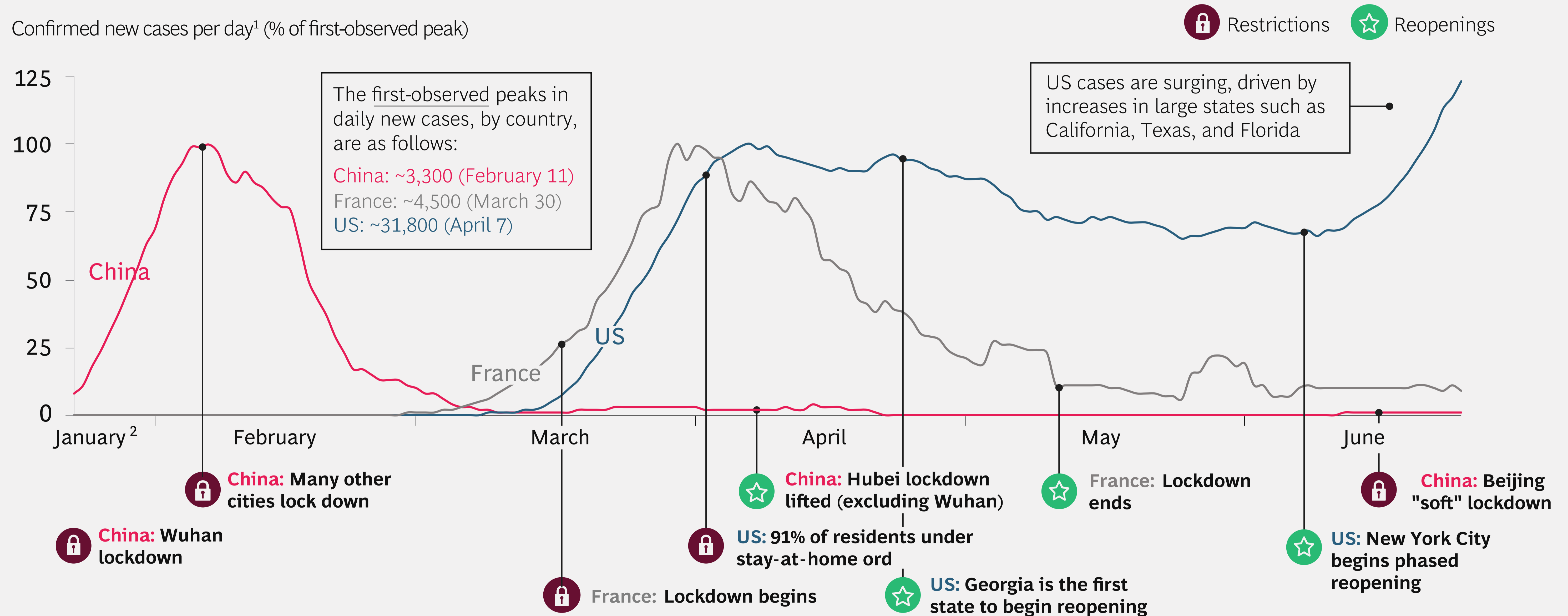


The US Is Experiencing a Resurgence of New Cases Amid Reopenings



Sources: New York Times data via Tableau; press research; BCG analysis.

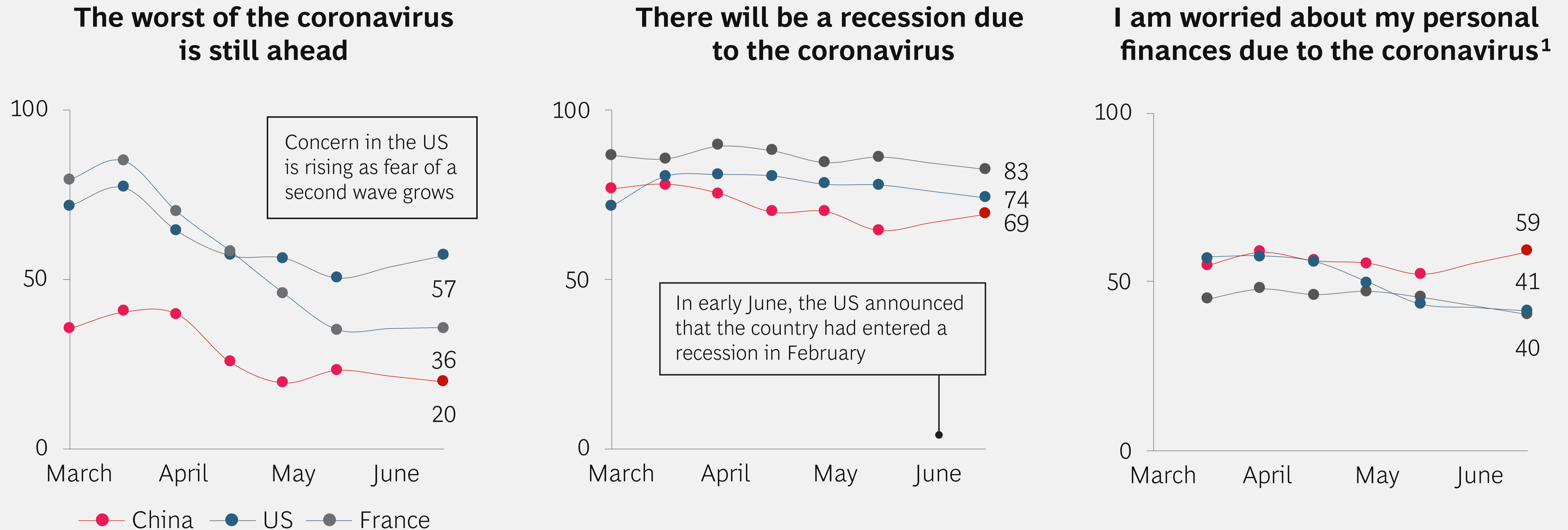
Note: For the graph of daily new reported cases, the February 13 data point for China was removed as an outlier (replaced by interpolation) due to a change in reporting on that date.

¹Seven-day rolling average, using the midpoint date, normalized to first-observed, country-specific peak daily cases.

²Graph starts on January 23.

Concern Over the Pandemic Has Levelled Off in China and France, Although Economic and Financial Worries Persist

Respondents who agree with the following statements (%)



Source: BCG COVID-19 Consumer Sentiment Survey, March 13–June 22, 2020 (N = 1,800–3,500), unweighted, representative within ±3% of census or national demographics.

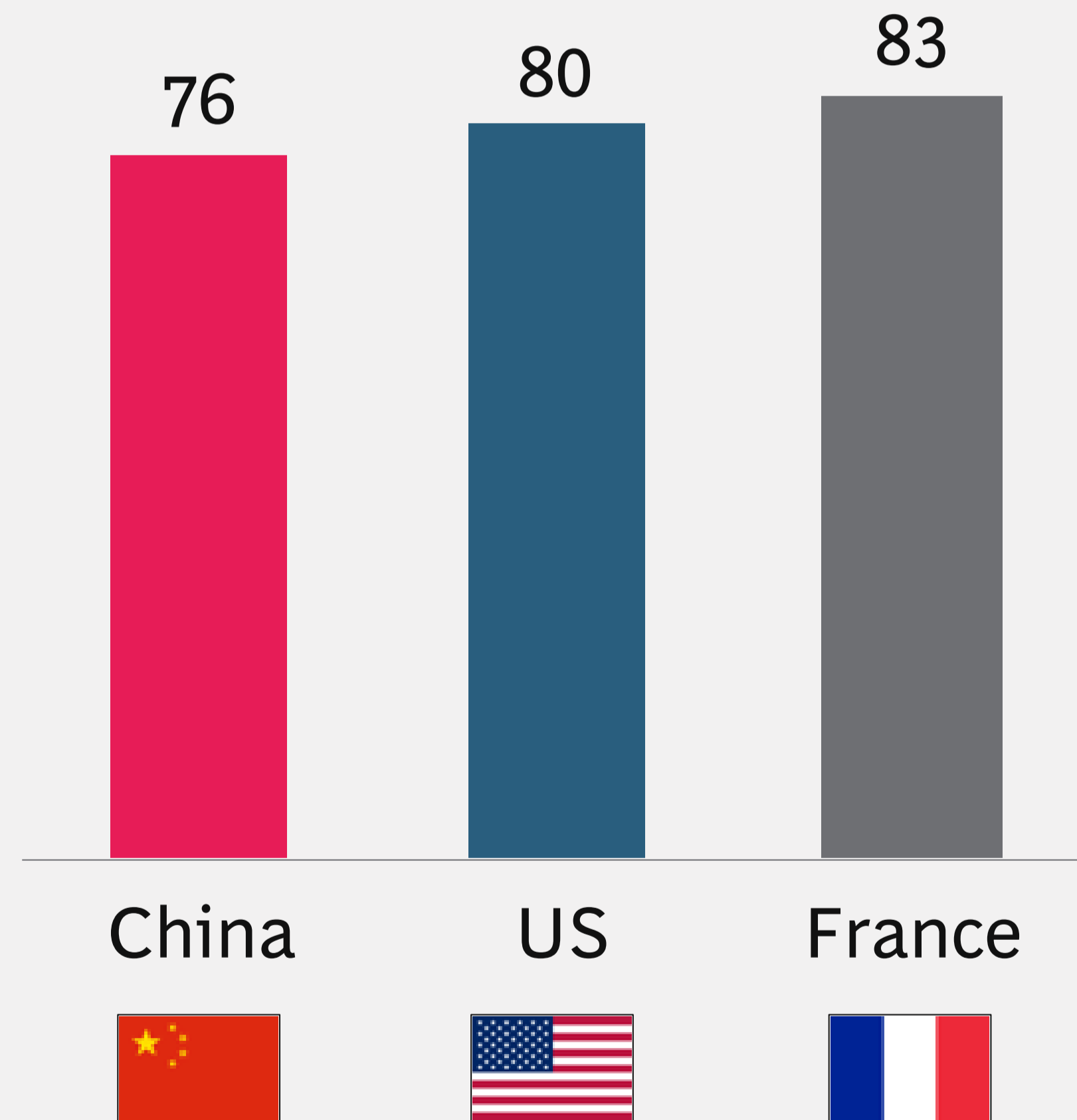
Note: Question text: “How much do you agree with each of the following statements about the coronavirus?”

¹ Longitudinal data available only from March 27 forward.

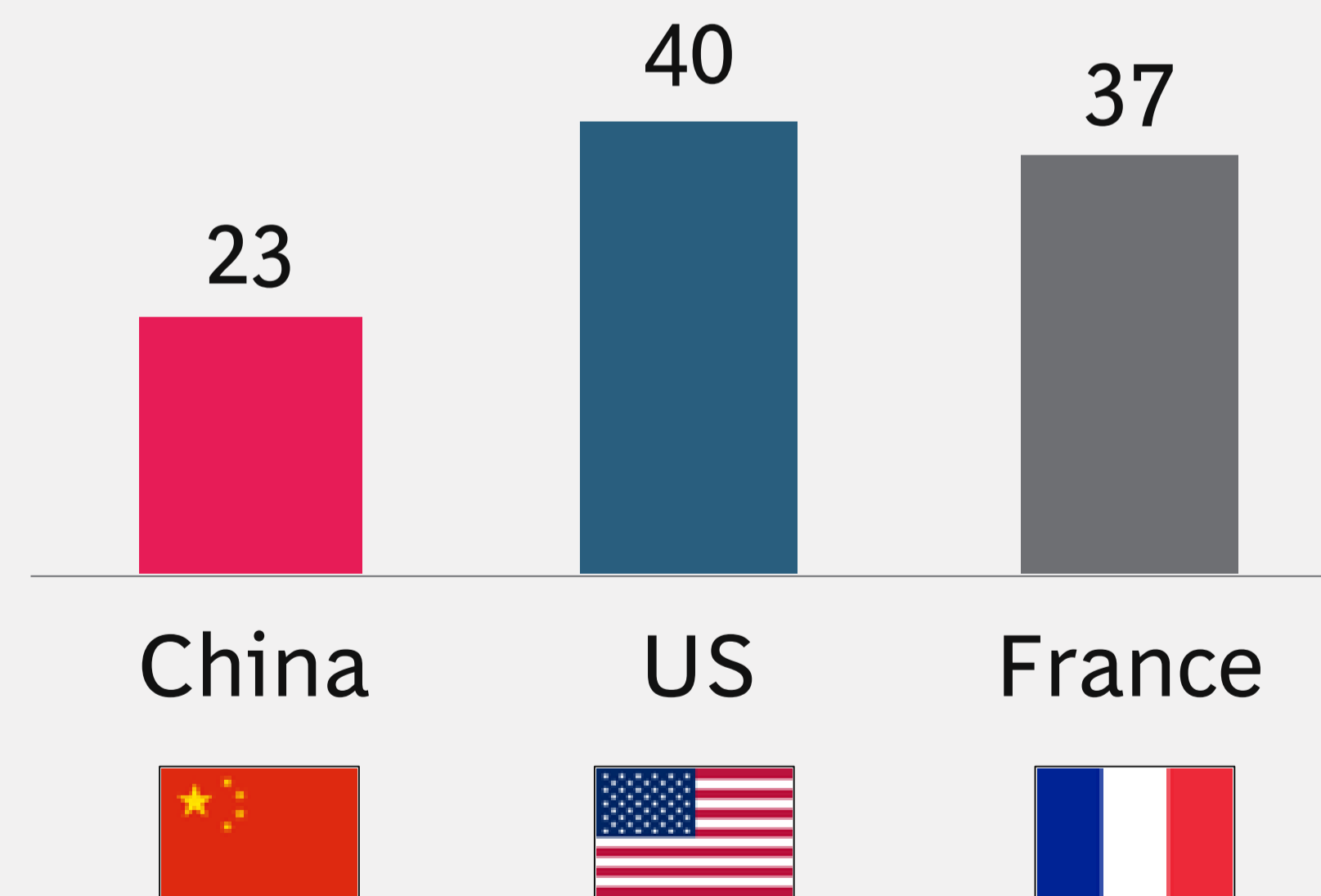
Consumers in China, the US, and France Are Fearful of Another Spike in Cases, and Therefore Want a Careful Reopening

Respondents who agree with the following statements (%)

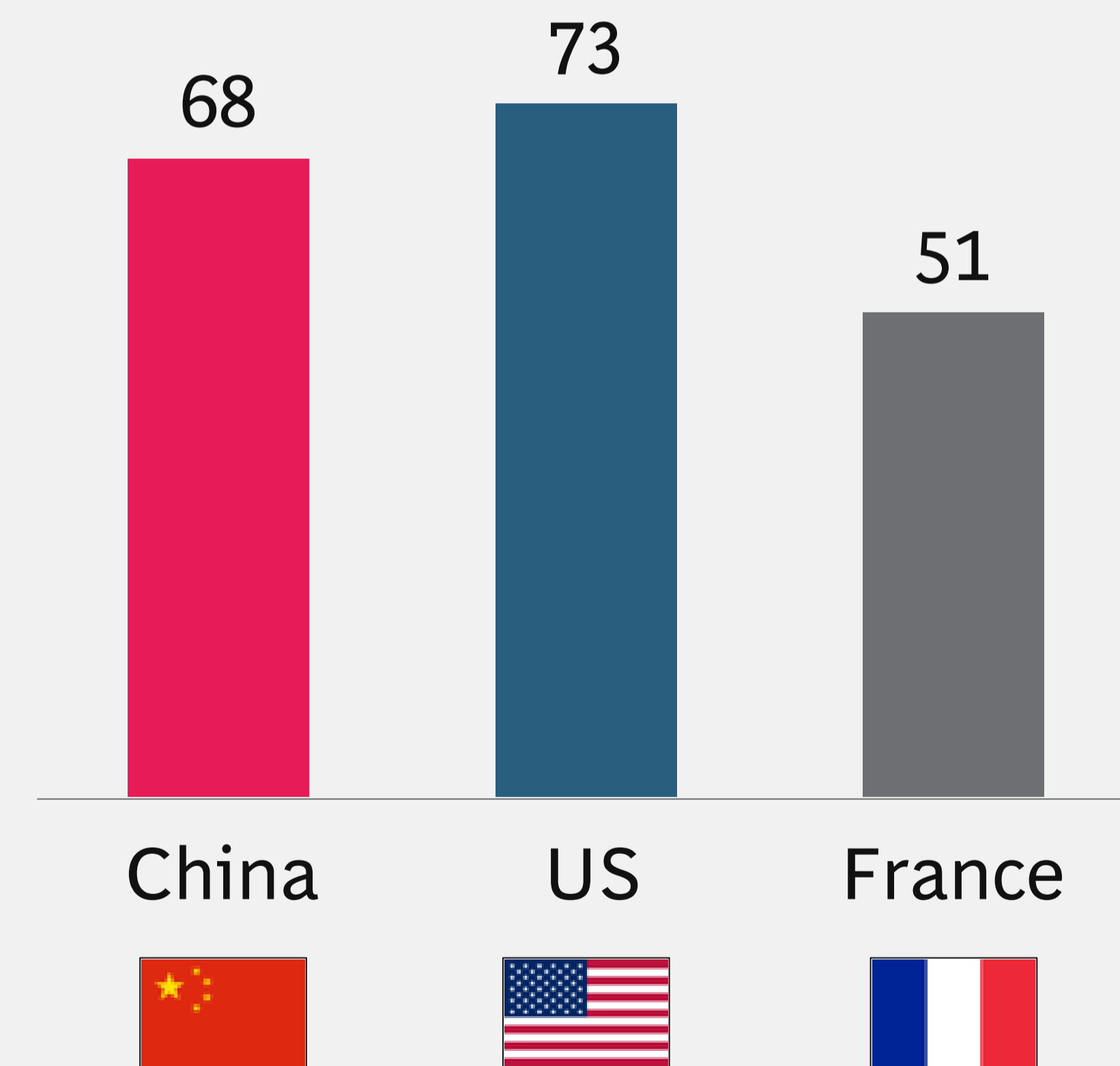
There will be another spike in new cases if we're not careful



There will be another lockdown in the next 12 months where I live



Even after they are allowed to, businesses should reopen slowly



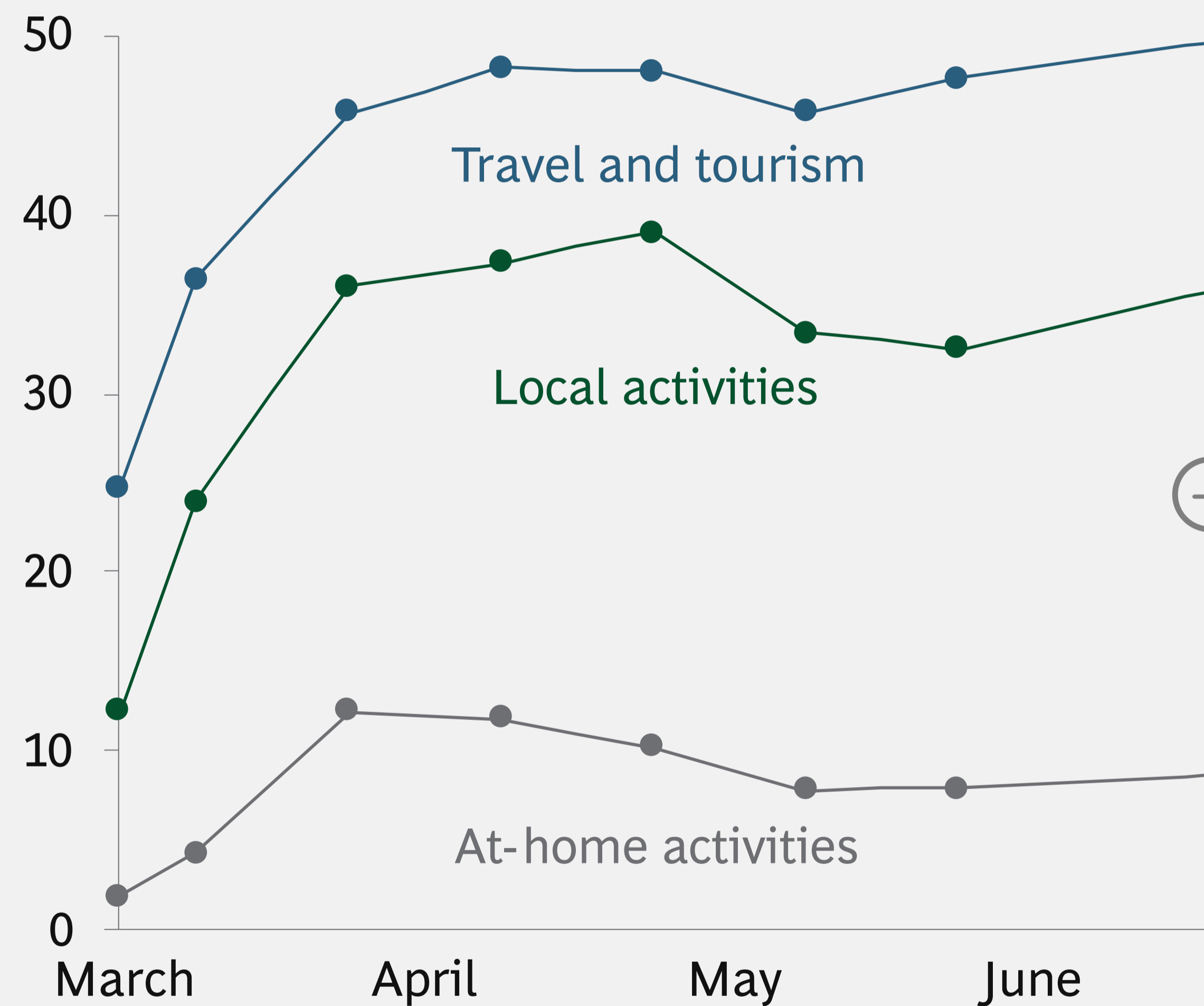
Source: BCG COVID-19 Consumer Sentiment Survey, June 19–22, 2020 (N = 3,000–3,400), unweighted, representative within ±3% of census or national demographics.

Note: Question text: “How much do you agree with each of the following statements about the coronavirus?”

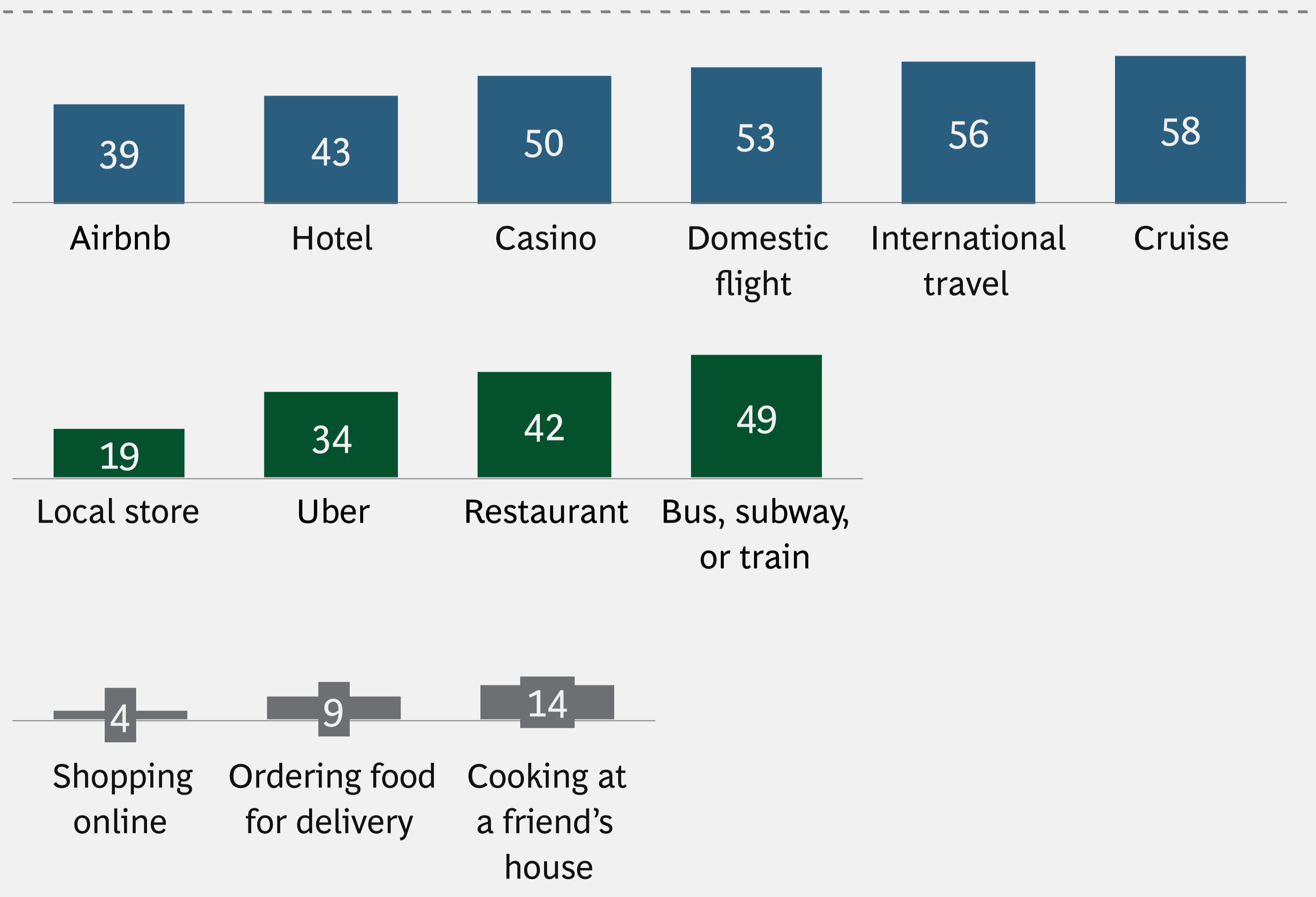
In the US, Virus Concerns Are Once Again Rising, Along With the Uptick in Cases

Respondents who are worried about catching the coronavirus from the following activities (%)

Activity categories over time



Individual activities, June 19–22

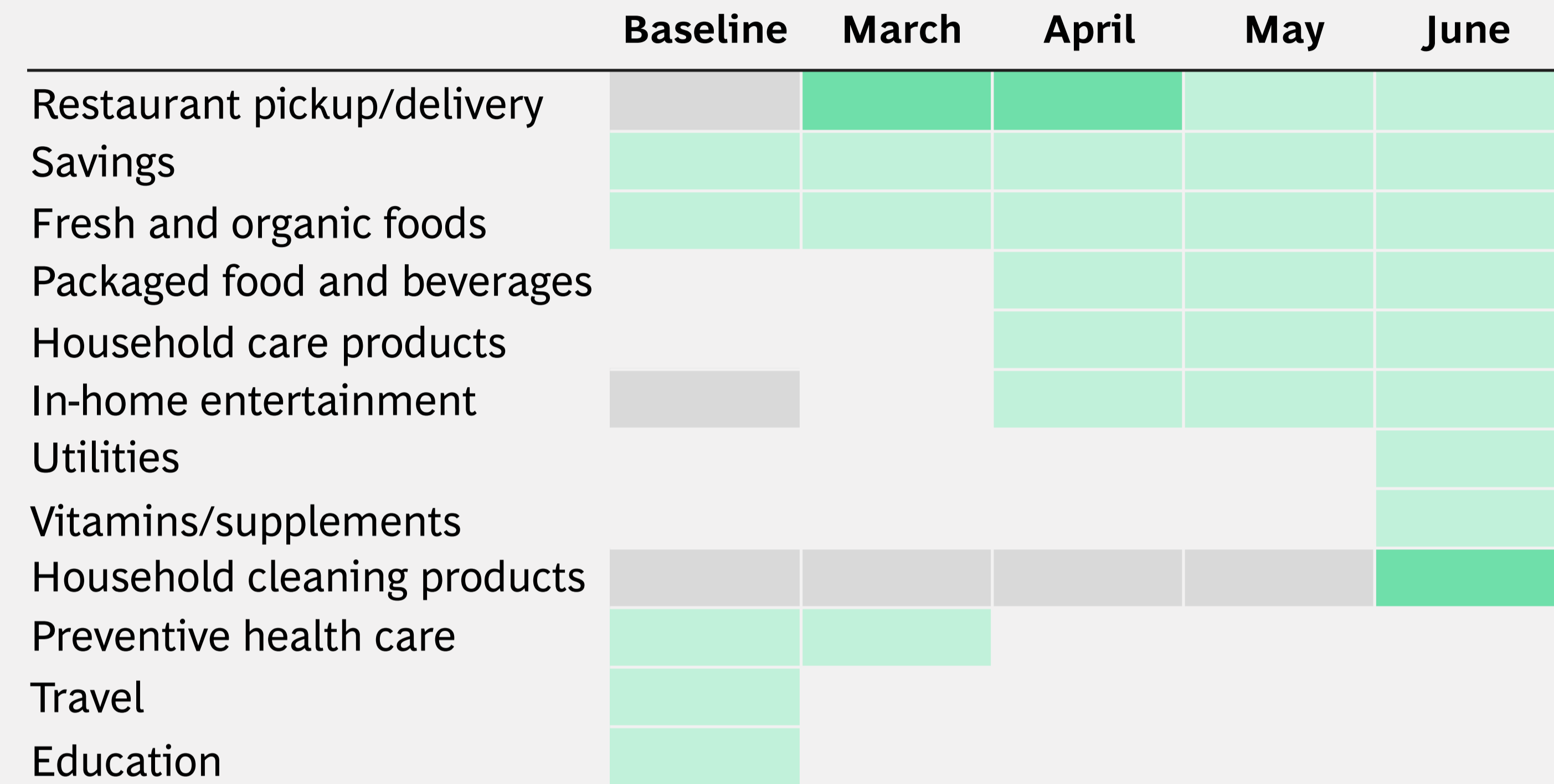


Source: BCG COVID-19 Consumer Sentiment Survey, March 6–May 11, 2020 (N = 2,400–3,500), unweighted, representative within ±3% of census demographics.

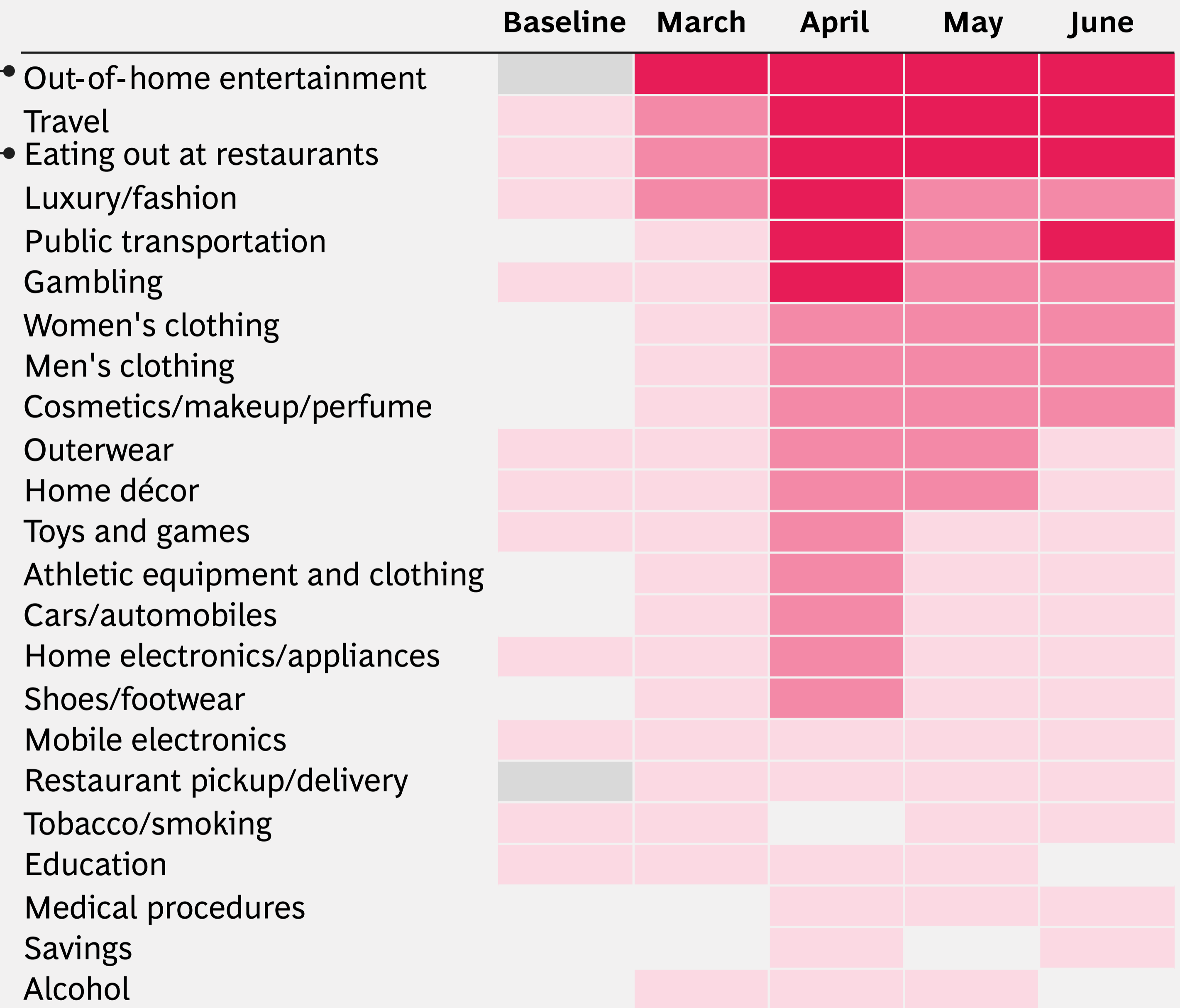
Note: Question text: “You mentioned you would be concerned about [activity]. What part of the experience concerns you? Select all that apply.”

Spending Expectations in the US Continue to Trend Positively

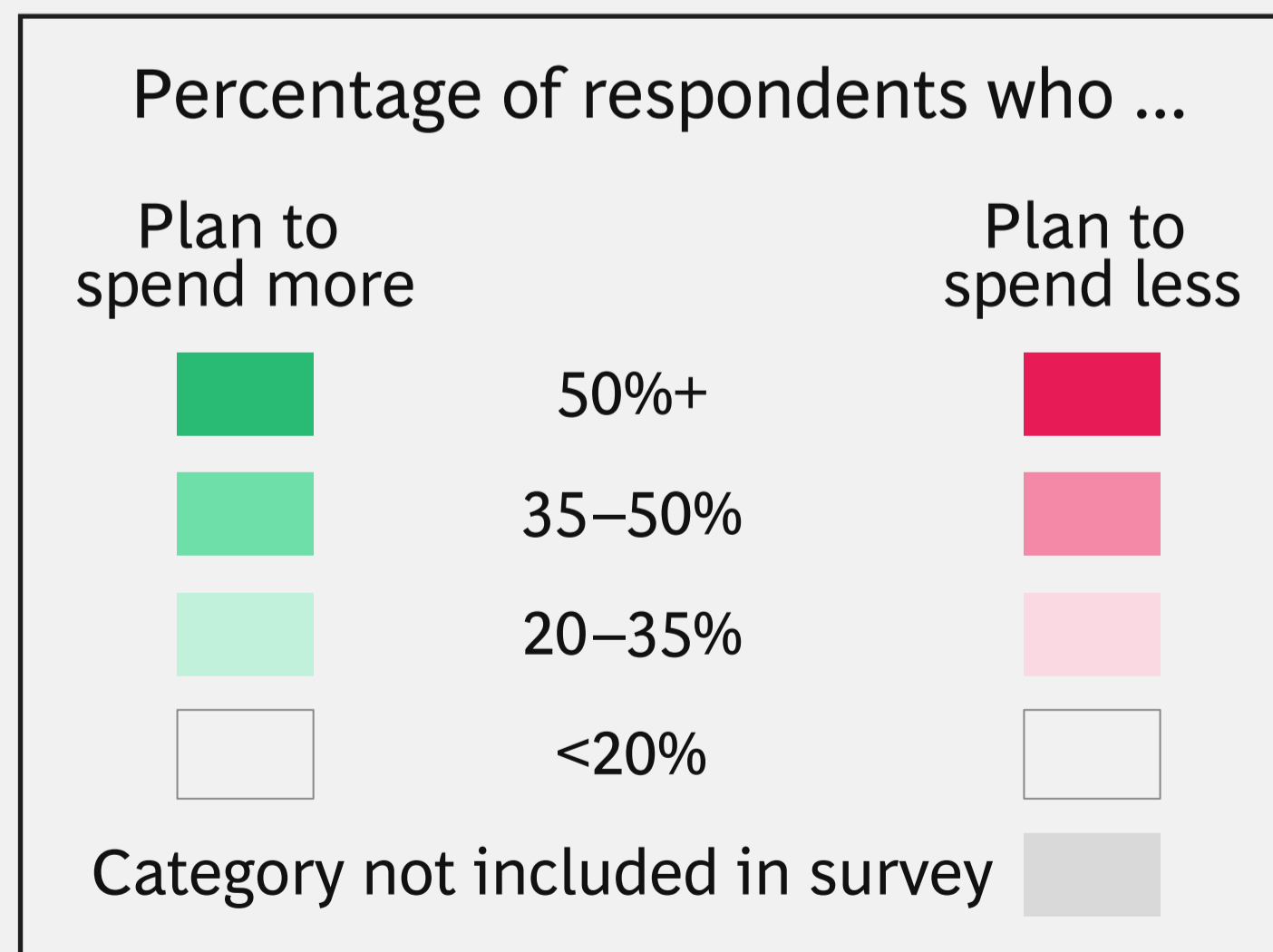
Winners



Losers



US data



Expected spending remains negative for restaurants and out-of-home entertainment, although many businesses were allowed to reopen in May/June across the US

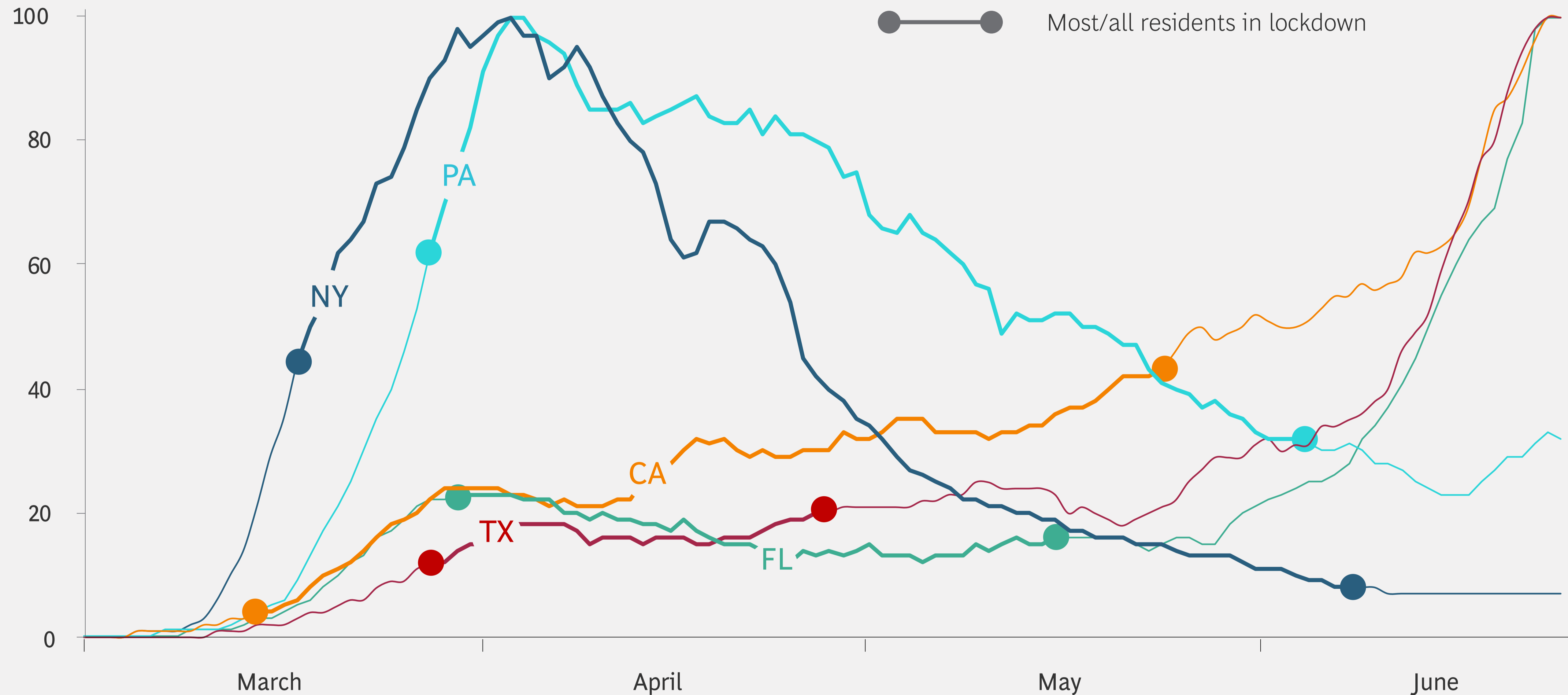
Source: BCG COVID-19 Consumer Sentiment Survey, March 6–May 11, 2020 (N = 2,400–3,500), unweighted, representative within ±3% of US census demographics.

Note: "Baseline" data is from the March 6–9 survey. Monthly averages include all data from surveys that month. Categories listed here exclude baby/child food, childcare, and children's clothing. Question text: "How do you expect your spend to change in the next 6 months across the following areas?"

US – WEEK 16 – JUNE 19–22

New Case Curves and Lockdown Timelines Vary Widely Across the US, with Some States Seeing Surges After Reopening

Daily new cases¹ (% of peak, by state)
Five most populous states



Graph shows % of each state's peak new case count:

- NY: 9,900
- FL: 6,300
- CA: 5,500
- TX: 5,400
- PA: 1,700

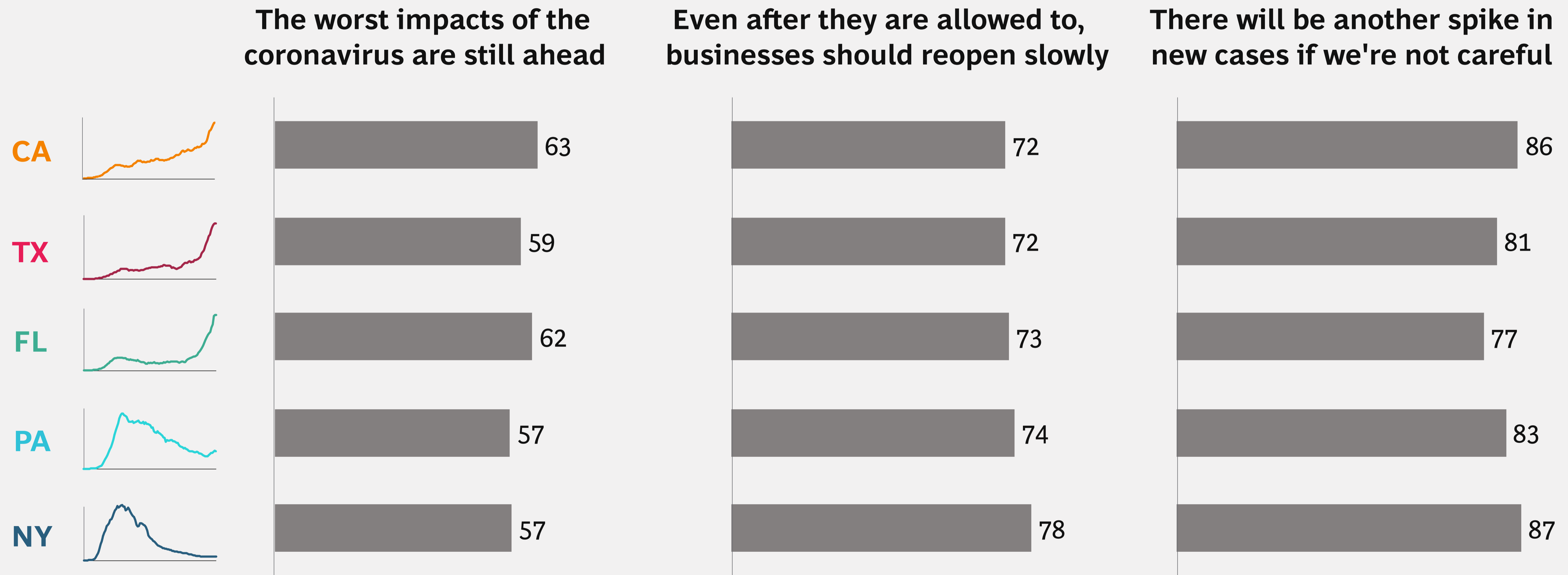
Sources: New York Times data via Tableau; press research; BCG analysis.

Note: The daily new cases curve for each state is shown as a percentage of its maximum daily new cases figure throughout the time period shown. Phase 1 of reopening in New York started on June 8; May 15 was the official end of the stay-at-home order, with gatherings of ten or fewer allowed starting on May 22. Some Florida counties had started opening on May 4; all counties had begun reopening by May 17.

¹ Seven-day rolling average, using the midpoint date, as a percentage of peak, by state.

Consumers Across States Feel Similarly That Risks Remain High and That Reopening Should Happen Slowly

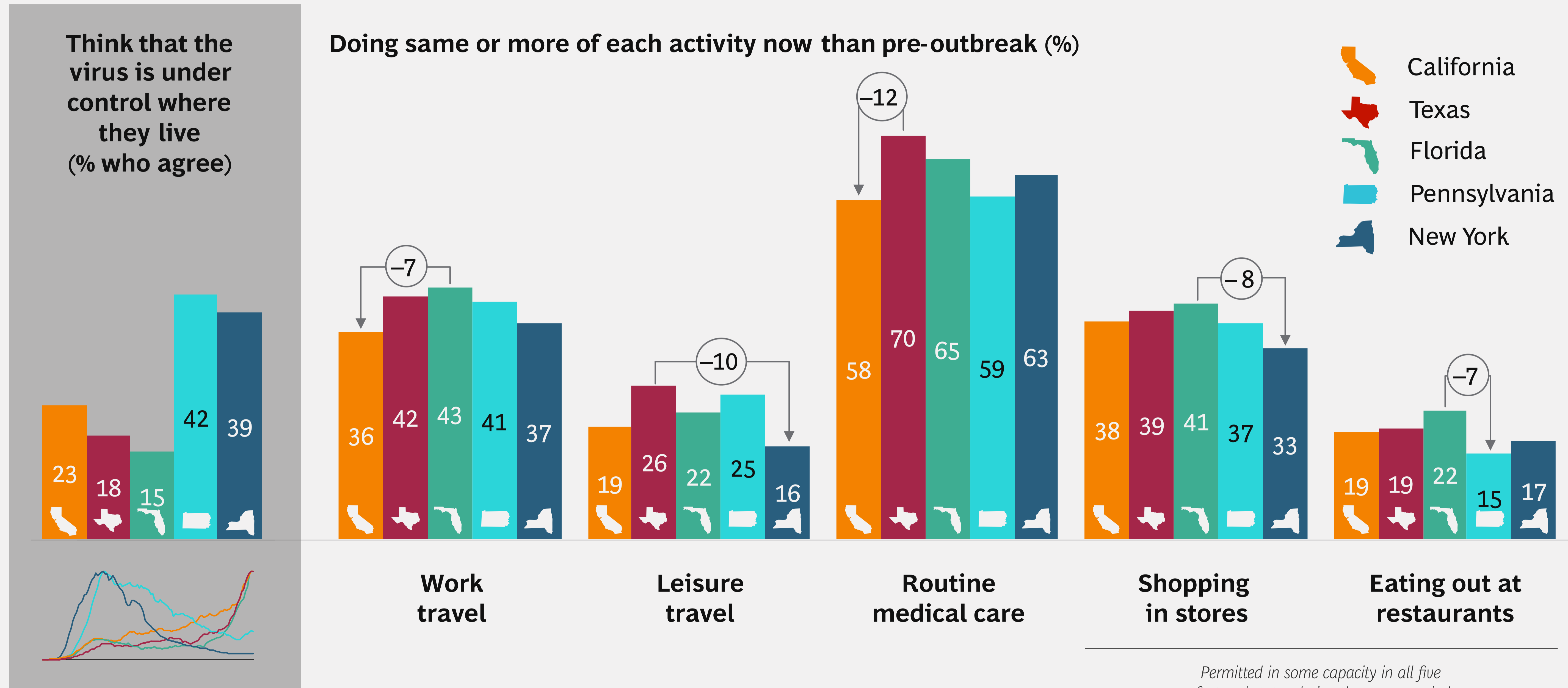
Respondents who agree with the following statements (%)



Source: BCG COVID-19 Consumer Sentiment Survey, June 19–22, 2020 (N = 3,388), unweighted, representative within ±5% of US census demographics.

Note: Curves shown depict new daily cases with a seven-day rolling average, using the midpoint date, as a percentage of peak by state. Question text: “How much do you agree with each of the following statements about the coronavirus?”

Despite Doubts That the Virus Is Under Control, Consumers Are Resuming Out-of-Home Activities, Led on Most Measures by Texas and Florida

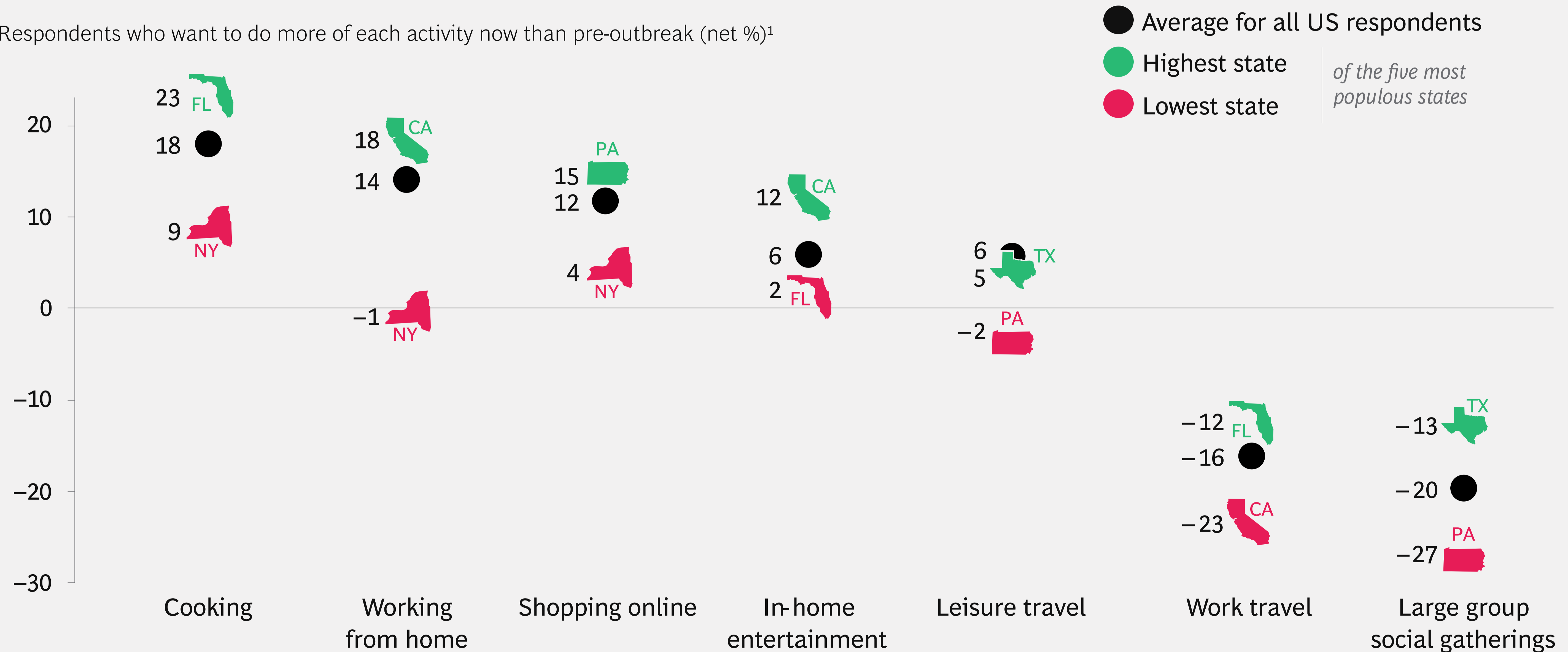


Source: BCG COVID-19 Consumer Sentiment Survey, June 19–22, 2020 (N = 3,388) unweighted, representative within ±5% of US census demographics.

Note: Curves shown depict new daily cases with a seven-day rolling average, using the midpoint date, as a percentage of peak by state. Question text: “How much do you agree with each of the following statements about the coronavirus?” and “Which of the following best describes how much you are doing each of the following activities today vs. before the coronavirus outbreak?”

States Differ Widely in the Lifestyle Changes That Their Residents Want to Make Post-Outbreak

Respondents who want to do more of each activity now than pre-outbreak (net %)¹



Source: BCG COVID-19 Consumer Sentiment Survey, June 19–22, 2020 (N = 3,388), unweighted, representative within ±5% of US census demographics.

Note: Question text: “Once things return to ‘normal’, how much do you want to do each of the following activities compared with how much you did before the coronavirus outbreak?”

¹“Net %” is the percentage of respondents who say that they want to do more of the specified activity minus the percentage of respondents who say they want to do less of it.