GLOBAL – SEPTEMBER

The US Experiences Some Turbulence as It Tries to Continue Descending Toward Its April First-Peak Levels; France Sees a Massive Second Wave

Source: New York Times data via Tableau.
Note: Graph starts on January 23, 2020. The February 13 data point for China (15,141) was removed as an outlier. Graph reports seven-day rolling averages, using the midpoint date, normalized to the first-observed peak in new daily cases by country, which occurred on February 7 in China (approximately 3,300 cases), March 30 in France (approximately 4,500 cases), and April 7 in the US (approximately 31,700 cases).
[1] R0, or reproduction number, indicates how contagious an infectious disease is.

US/FRANCE – SEPTEMBER

US and French Respondents Recognized the Onset of COVID-19 Resurgences Back in July…

Sources: New York Times data via Tableau; BCG COVID-19 Consumer Sentiment Survey, March 13–September 13, 2020 (N = 2,400–3,500), unweighted, representative within ±3% of census or national demographics.

US/FRANCE – SEPTEMBER

…But Sentiment and Behaviors Have Largely Plateaued Since May, Suggesting an Attitude of Resignation or Coronavirus Fatigue

Consumer behavior
"I'm trying to avoid public spaces as much as possible due to the coronavirus" (% agreeing)

- French respondents who agree on avoiding public spaces
- US respondents who agree on avoiding public spaces

Economic outlook
"There will be an economic recession due to the coronavirus" (% agreeing)

- French respondents who expect a recession
- US respondents who expect a recession

Confirmed new cases per day
(% of first-observed peak)

- Confirmed daily new cases, France
- Confirmed daily new cases, US

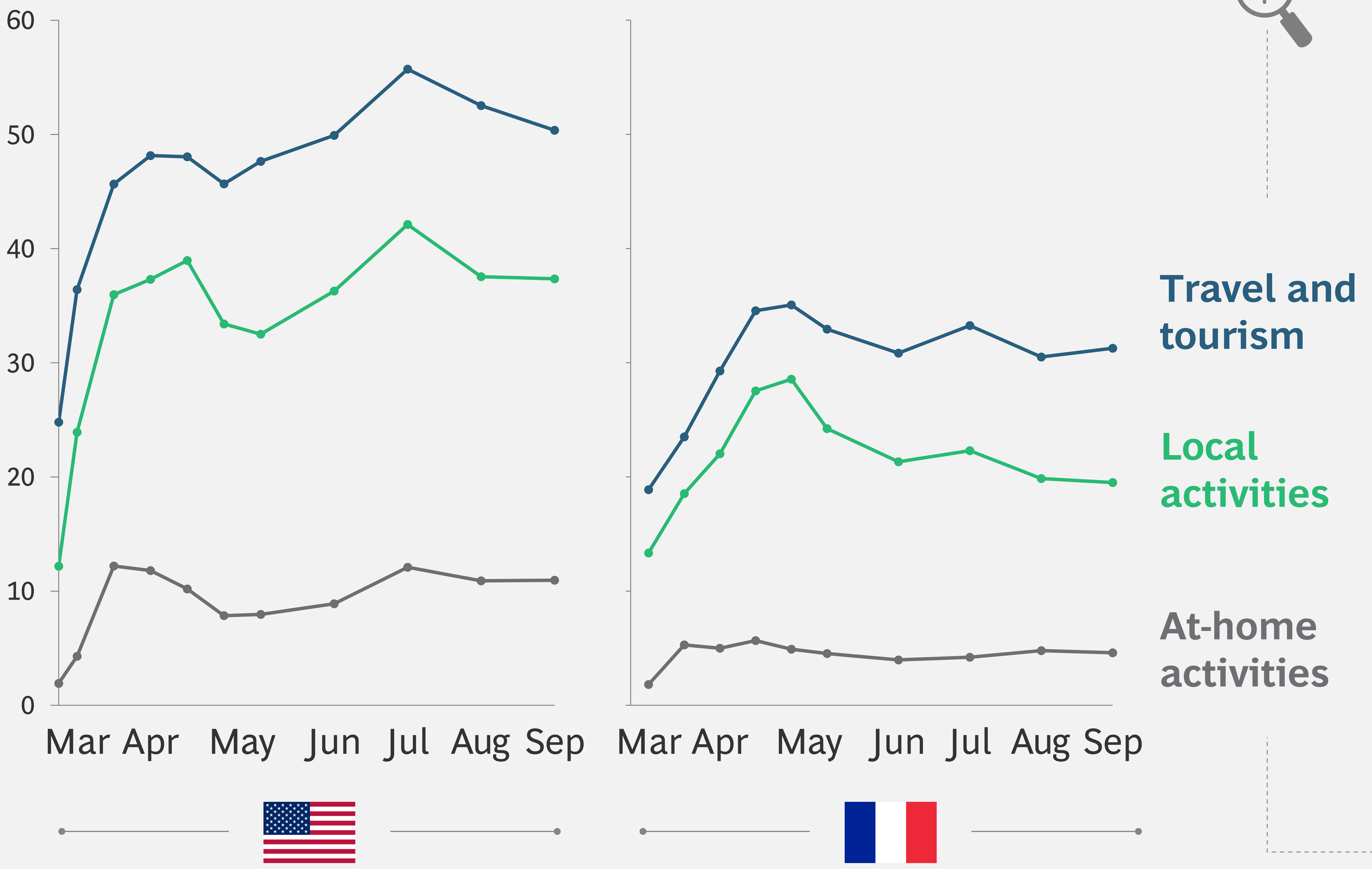
Sources: New York Times data via Tableau; BCG COVID-19 Consumer Sentiment Survey, March 13–September 13, 2020 (N = 2,400–3,500), unweighted, representative within ±3% of census or national demographics.

US/FRANCE – SEPTEMBER

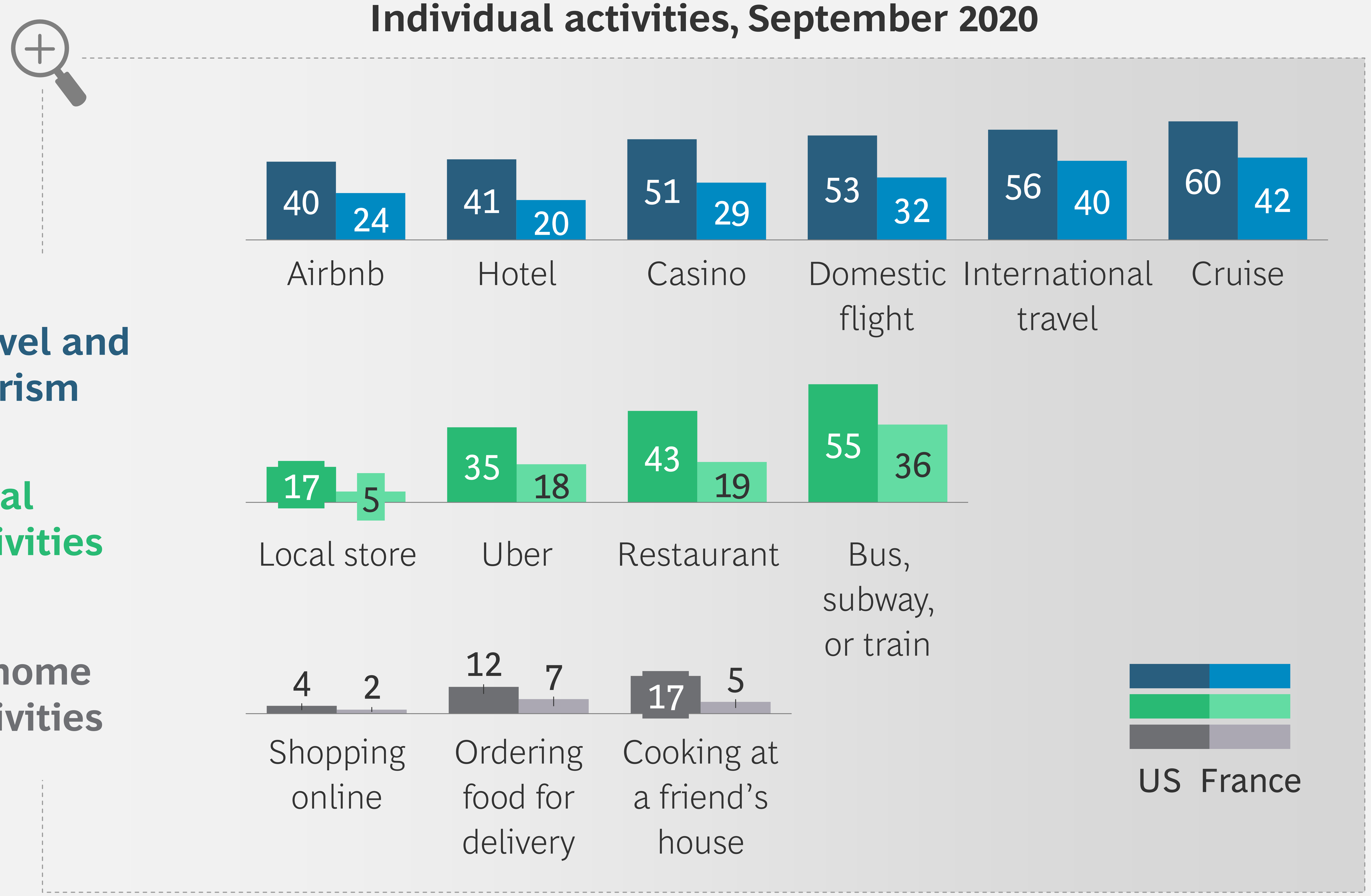
In the US, Travel Concerns Dropped Slightly While Concerns About Local and At-Home Activities Held Steady; in France, Levels of Concern Were Lower

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

Activity categories over time



Individual activities, September 2020



Sources: BCG COVID-19 Consumer Sentiment Survey, March–September, 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."

US – SEPTEMBER

US Consumers' Category-by-Category Spending Expectations Improved Slightly in September as Daily New Case Counts Improved

Sources: BCG COVID-19 Consumer Sentiment Survey, March–September (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 conducted during 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/FRANCE – SEPTEMBER

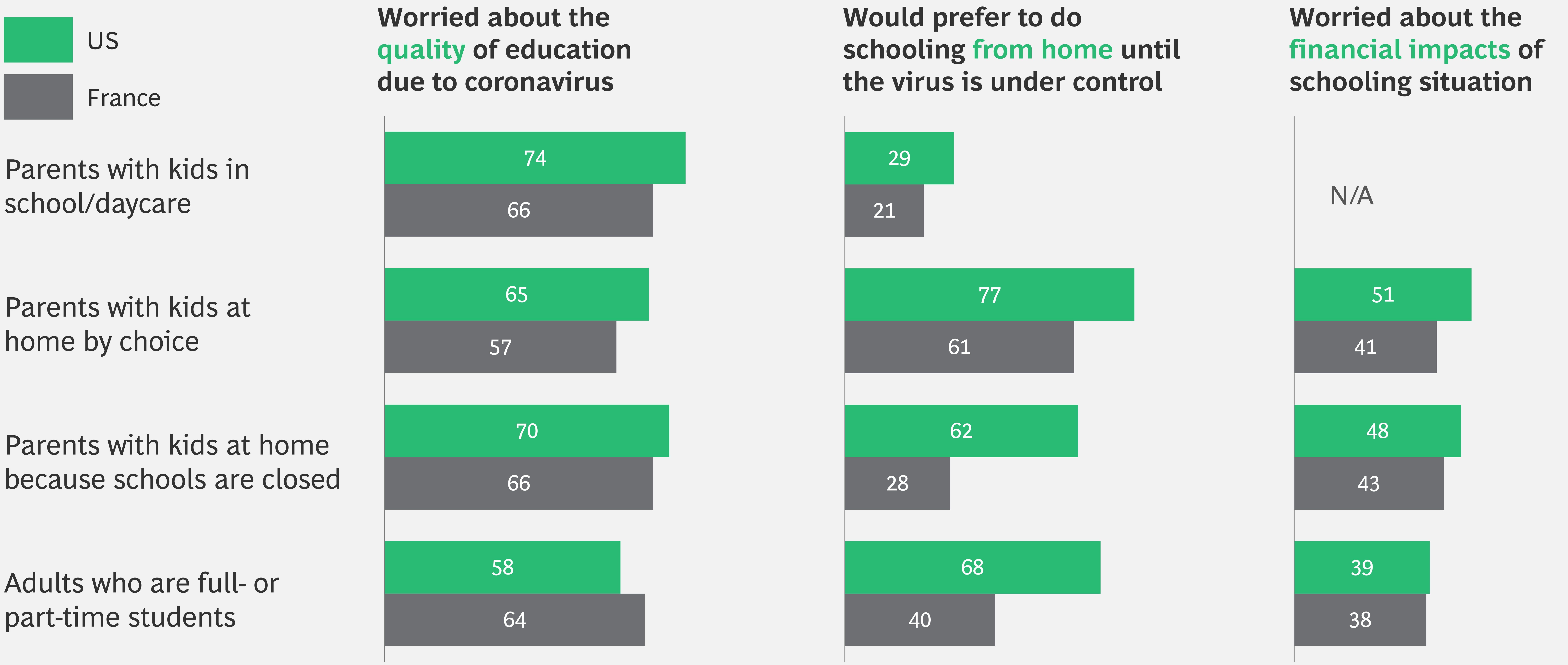
France Is Generally Ahead of the US Along the Economic Recovery Curve, but It Still Has a Long Way to Go, Especially in Travel Categories

Sources: BCG COVID-19 Consumer Sentiment Survey, June–September, 2020 (N = 3,000–3,400), unweighted, representative within ±3% of census demographics.
Note: Results exclude respondents who answered "N/A – I never/rarely did this, even before the coronavirus" or who answered previously that they had never done the activity (for travel and tourism only). Question text: "When do you think you will begin __________ again?" and "When do you think your spend would return to 'normal' (i.e., similar to before the outbreak)?" ppt = percentage points.

US/FRANCE – SEPTEMBER

As School Classes Resume, Parents and Students Worry About Quality of Education, with More Mixed Feelings About In-Class vs. At-Home Formats

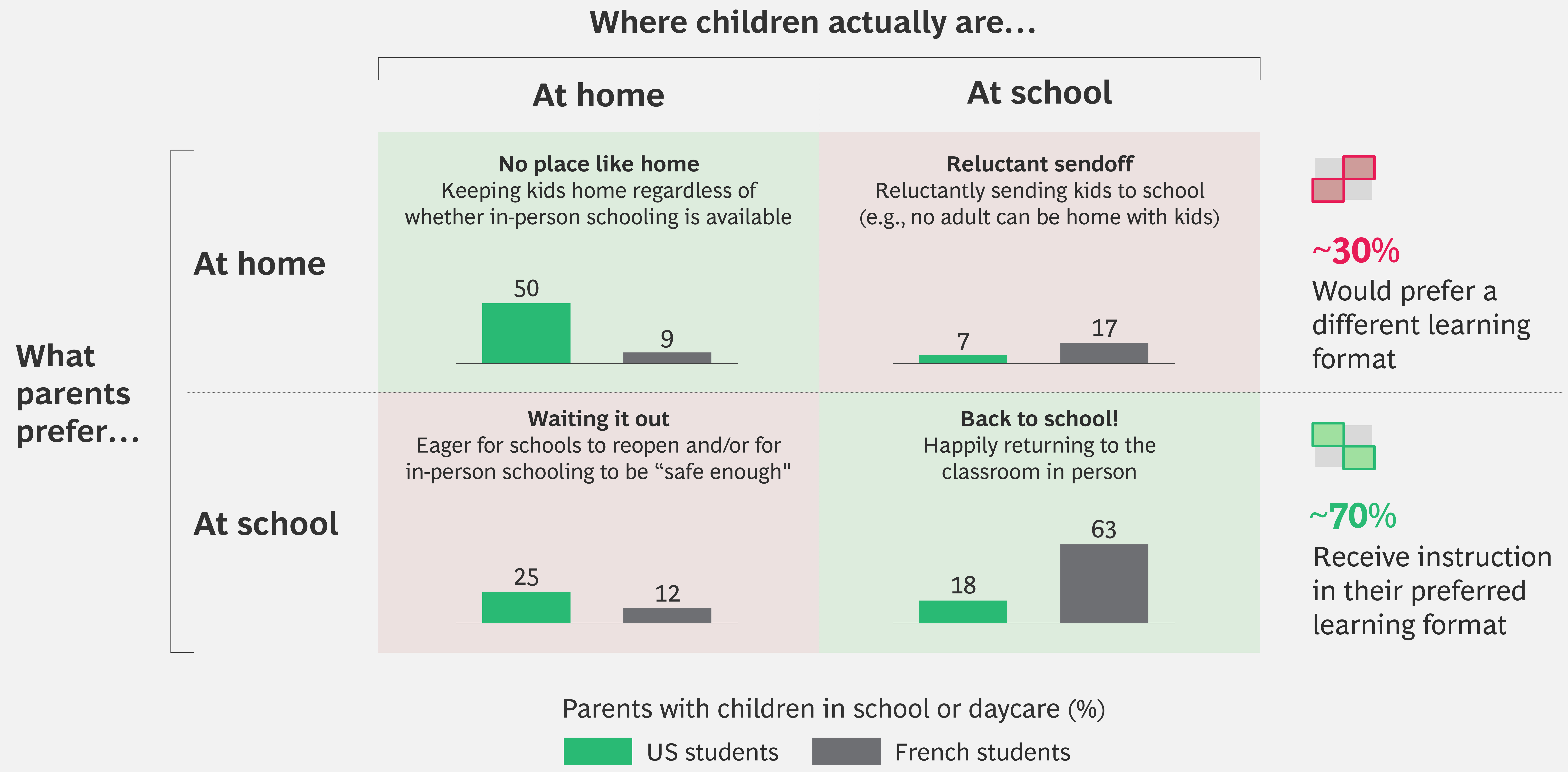
Respondents who agree with the following statements (%)



Source: BCG COVID-19 Consumer Sentiment Survey, September 11–13, 2020 (N = 3,000–3,400), unweighted, representative within ±3% of census demographics.
Note: Question text: "Which of the following statements apply to you? Select all that apply." and "How much do you agree with each of the following statements about the coronavirus?"

US/FRANCE – SEPTEMBER

Parents Are Divided on Where They Prefer Schooling to Occur During the Pandemic, but Most Can Achieve Their Preferred Setup

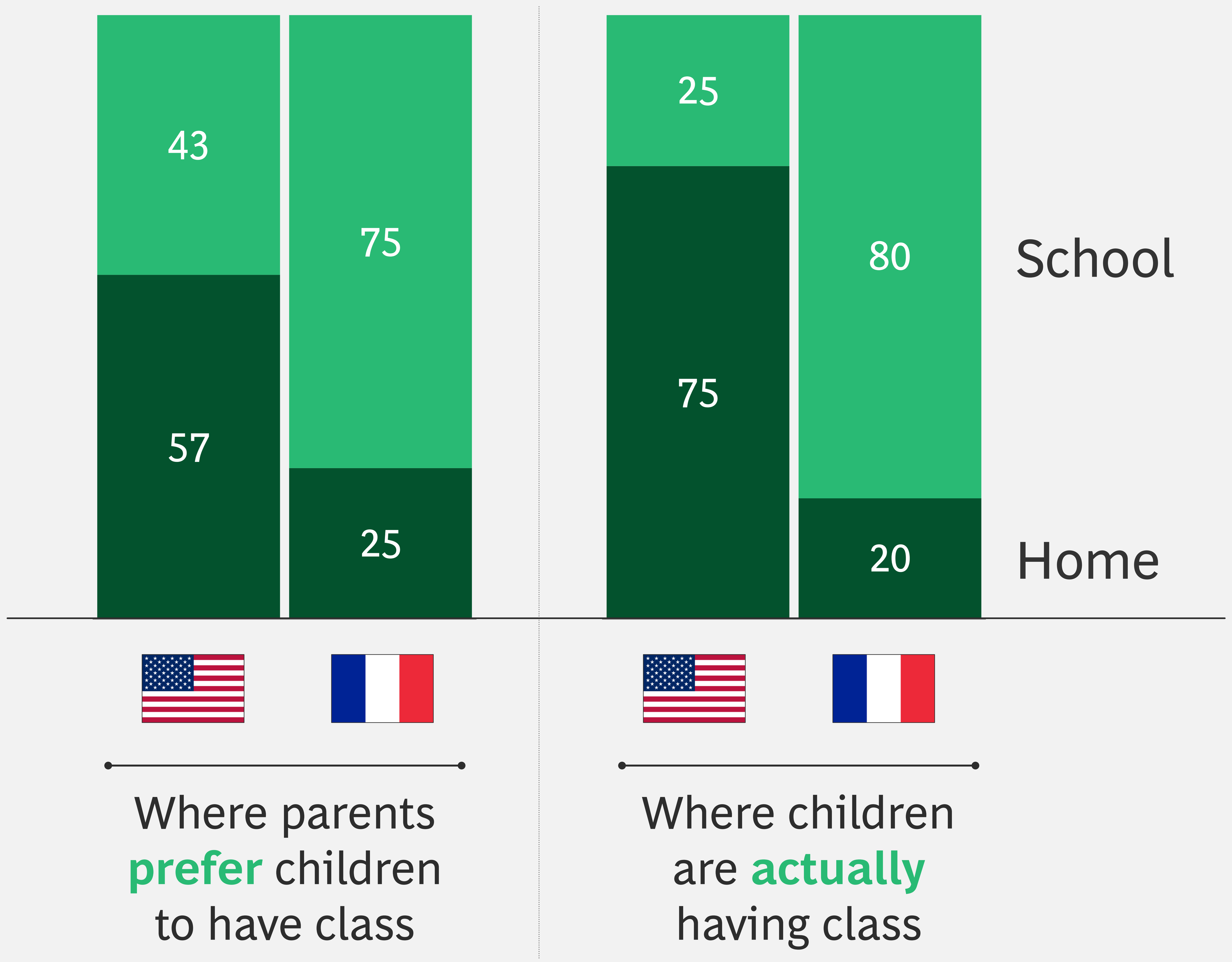


Source: BCG COVID-19 Consumer Sentiment Survey, September 11–13, 2020 (N = 3,000–3,400), unweighted, representative within ±3% of census demographics.
Note: Question text: "Which of the following statements apply to you? Select all that apply." and "How much do you agree with each of the following statements about the coronavirus?"

US/FRANCE – SEPTEMBER

Although Both Countries Are Enduring Second Waves of COVID-19, Parents in France Report a Much Greater Desire to Keep Their Children in Schools

Parents with children in school or daycare (%)



French students are more than 3x more likely to be attending classes in school than at home

Parents in the US are more than 2x more likely to prefer having children at home during the coronavirus outbreak

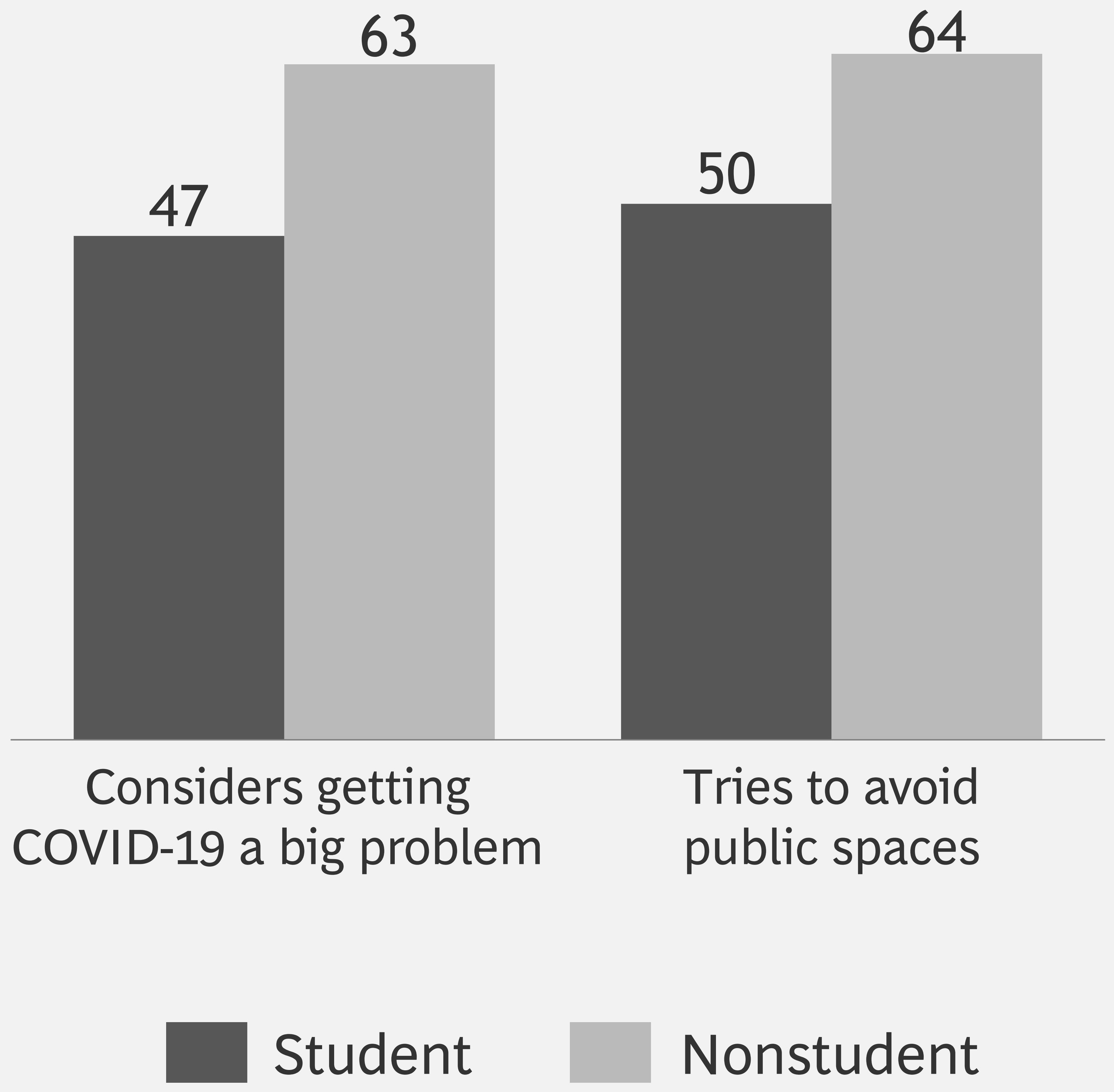
Source: BCG COVID-19 Consumer Sentiment Survey, September 11–13, 2020 (N = 3,000–3,400), unweighted, representative within ±3% of census demographics.
Note: Question text: “Which of the following statements apply to you? Select all that apply.” and “How much do you agree with each of the following statements about the coronavirus?”

US/FRANCE – SEPTEMBER

University Reopenings May Increase Coronavirus Spread, as Students 18+ Tend to Be Less Risk Averse or Worried About COVID-19; the US Is Already Seeing Spikes

Return to colleges may be triggering outbreaks throughout the US

In France, students 18+ feel less at risk, less risk averse…



…and generally more frustrated/bored than worried about the coronavirus

Difference in percentage indicating each emotion vs. nonstudents; emotions with ≥3-ppt difference

Frustration	+**12** ppt
Boredom	+**10** ppt
Hopelessness	+**5** ppt
Sadness	–**3** ppt
Worry	–**6** ppt
Anger	–**9** ppt

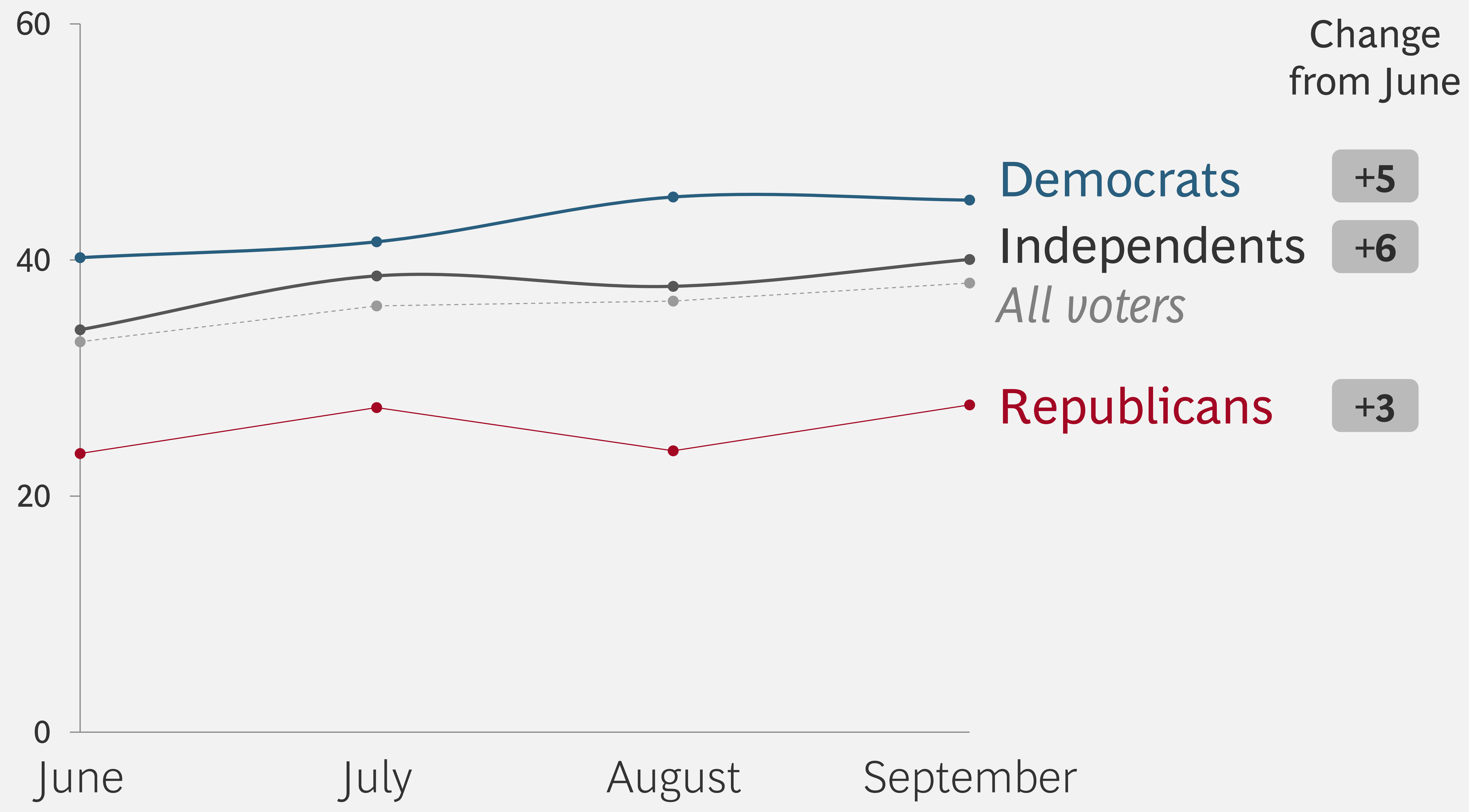
Sources: New York Times; BCG COVID-19 Consumer Sentiment Survey, September 11–13, 2020 (N = 3,000), unweighted, representative within ±3% of census demographics.
Note: Question text: “How much do you agree with each of the following statements about the coronavirus?” and “What emotions come to mind when you think about the coronavirus? Please select up to 3 emotions.”
ppt = percentage points.

US – SEPTEMBER

Looking Ahead: As the 2020 US Presidential Election Draws Near, the Coronavirus Is Poised to Play an Influential Role in Voting Decisions

Nearly 40% of the electorate say that the coronavirus has affected their intended presidential vote

"How much has the coronavirus outbreak affected your vote for the 2020 Presidential Election?" (% indicating any level of impact[1])



Most voters say that the coronavirus worries and frustrates them, but the source of emotion differs by political affiliation

"What emotions come to mind when you think about the coronavirus?" (% of respondents)

	Worry	Frustration	Anger	Leading source of feelings/emotion[2]
Democrats	69%	48%	23%	**Government**
Independents	59%	54%	22%	**Government**
Republicans	53%	52%	22%	**News/media**

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

[1] "Any level of impact" includes these answers: "A lot," "Somewhat," and "A little."

[2] Question text: "Who causes you to feel (emotion) when you think about the coronavirus?" The leading cause listed for each voter category was the top selection for each of the three emotions shown.