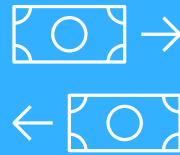


Research Brief



# COVID-19 trilemma tradeoffs

Ongoing research highlights  
conflicting consumer concerns

IBM Institute for  
Business Value



# COVID-19 trilemma tradeoffs

## Crisis of Confidence

Much of the COVID-19 pandemic has turned into a shared experience involving a trilemma of concerns. People across the US are worried about their: (1) personal health and safety; (2) economic future and job security; and (3) individual privacy and liberty.

And, based on an ongoing study by the IBM Institute for Business Value (IBV)—which has surveyed more than 54,000 respondents in the United States between April and July 2020<sup>1</sup>—there doesn't seem to be any relief in sight.

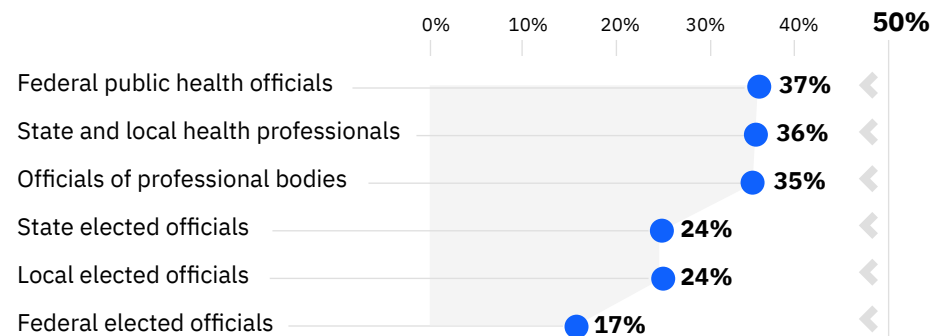
While society begins to adjust, two-thirds of individuals are concerned about a second wave of COVID-19 hitting later in 2020. More than 60 percent expect to see more global pandemic events like COVID-19 in months and years to come.

These concerns are exacerbated by a widespread lack of confidence in those who have the most control over our shared futures. Less than half of respondents say the actions taken by both government leaders and their employers in response to the COVID-19 pandemic have been reasonable and appropriate. And when it comes to making ethical decisions about reopening, most lack trust in their employers, elected leaders, and public health officials at all levels (see Figure 1).

**Figure 1**

## Disapproval ratings

Fewer than half of respondents say government leaders and employers responded to COVID-19 reasonably and appropriately.



## Consumers in the US weigh a trilemma of concerns

To gain deeper insight into the tradeoffs—preventing sickness, growing the economy and protecting privacy—we gave respondents three pair-wise comparisons and asked them to indicate which of the factors was relatively more important for leaders to consider in dealing with public health events like the COVID-19 pandemic.

While most people prioritize human life and health, more than one in five say the economy and personal privacy and liberty are more important societal factors to consider when making decisions regarding the pandemic (see Figure 2). These choices have remained consistent since April.

When asked to make a direct tradeoff about the relative importance between low infection and death rates and a strong economy in the near-term, more than 40 percent selected health, while more than 20 percent selected the economy.

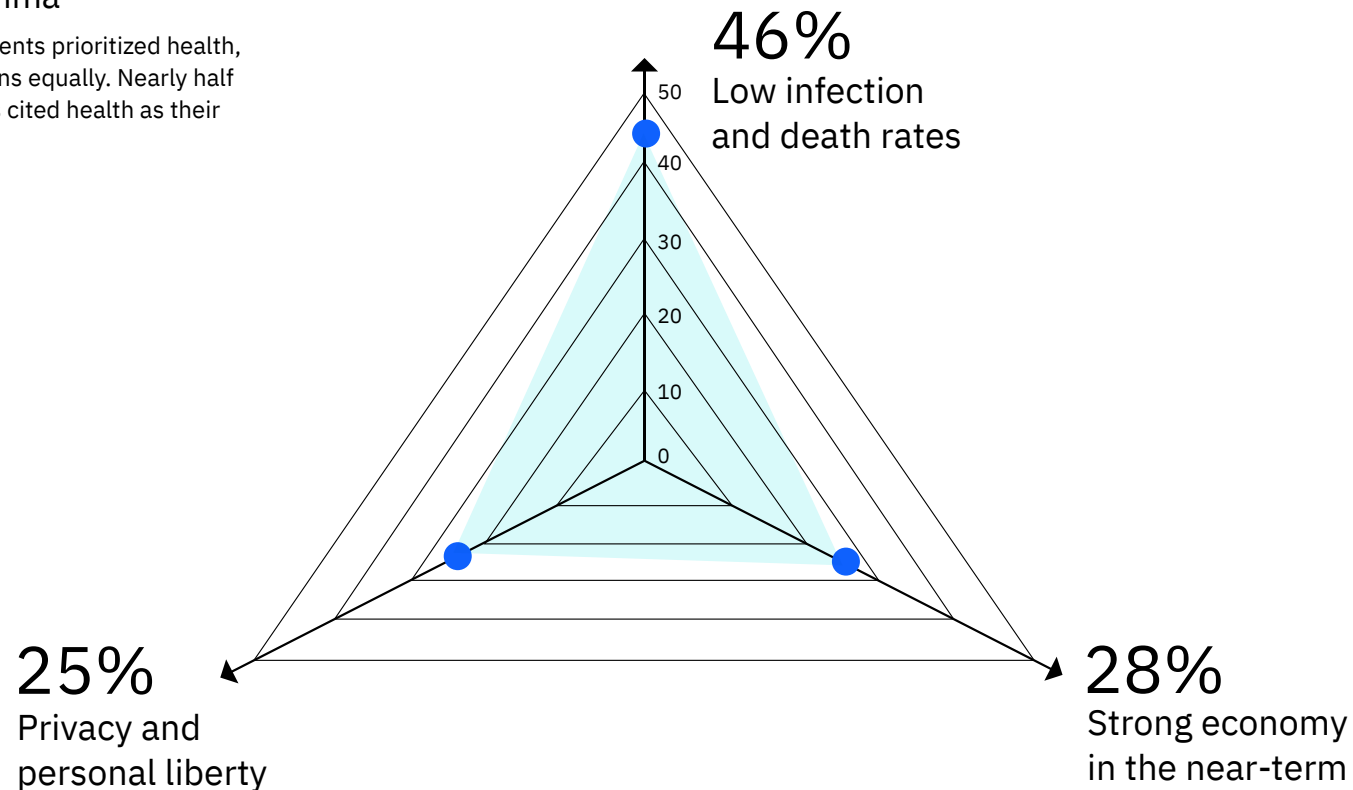
In the head-to-head tradeoff between low infections and death rates, and privacy and personal liberty, nearly half chose health, while more than 20 percent sided with privacy.

Interestingly, about a third of respondents struggled to make a choice about which of the three was more important, and therefore prioritized all factors equally.

**Figure 2**

### The COVID-19 trilemma

Roughly one-third of respondents prioritized health, privacy and economic concerns equally. Nearly half of the remaining respondents cited health as their highest priority.



## Ongoing concerns over the impact of the coronavirus remain very real

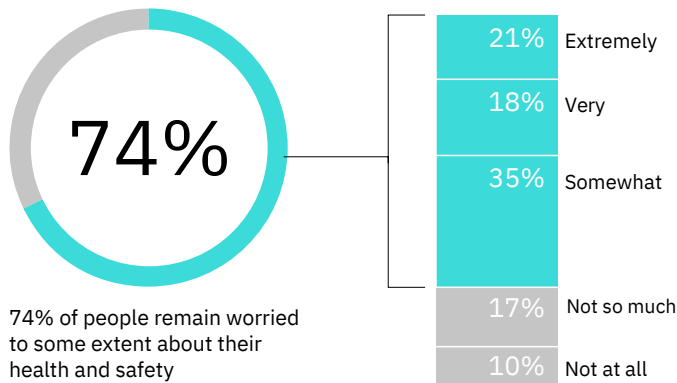
While society reopens in fits and starts, most people are not optimistic about returning to any semblance of normal any time soon. More than 68 percent of individuals say they are more concerned than ever about the safety and health of their families, and one in ten people report that someone in their household has either tested positive or is showing symptoms of COVID-19. Nearly 40 percent are very or extremely worried that they or a family member may become infected and seriously ill as a result of this virus. Only 10 percent are not worried at all (see Figure 3).

Sixty-two percent expect we will continue to experience pandemics in the future. Fewer than half say that government officials and their employers have responded adequately to COVID-19.

Nearly 60 percent of citizens are concerned that lifting stay-at-home restrictions will result in another outbreak of COVID-19 in the area where they live, and two-thirds are concerned about a second wave of the virus hitting their area later in 2020.

**Figure 3**  
Healthy skepticism

Consumers are concerned about their families' health and safety as society starts to reopen.



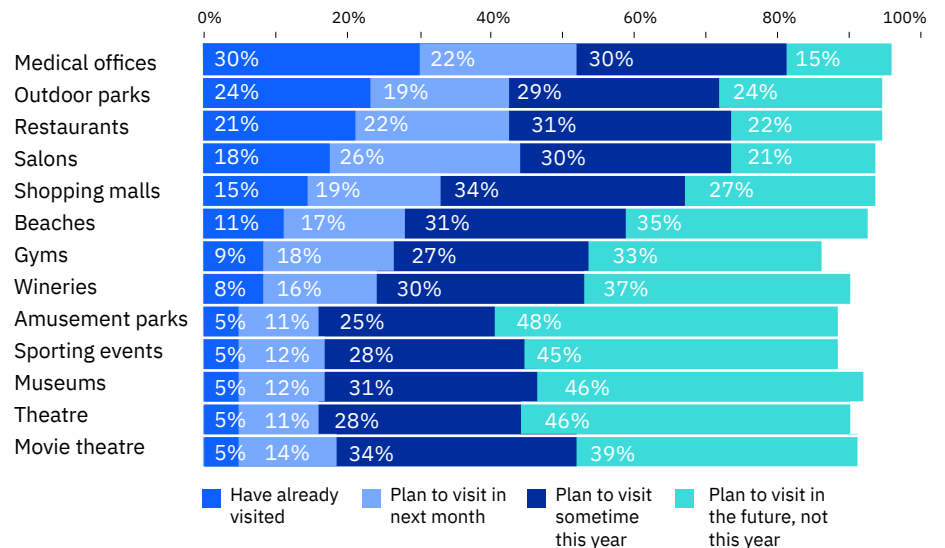
## People have started going out, and they expect businesses to mitigate their risk of infection

Despite serious concerns about health and safety, large numbers of people are already going out and visiting businesses and public places. By the end of June 2020, 30 percent of people had already been to a doctor or dentist's office, nearly a quarter had been to an outdoor park, and one in five had visited a restaurant or bar.

And even though social distancing and other restrictions have not been fully lifted in many areas, some people have already visited venues where groups gather, but many are still reluctant. More than half say they plan to visit a shopping mall. Significant numbers expect to visit a gym (45 percent), museum (43 percent), or live sporting event (40 percent) at some point this year. Thirty-six percent plan to go to an amusement park (see Figure 4).

**Figure 4**  
Out and about

Businesses, including restaurants, salons and shopping malls, could see an uptick in consumer traffic in the next month.



## Travel plans fall victim to the lockdown

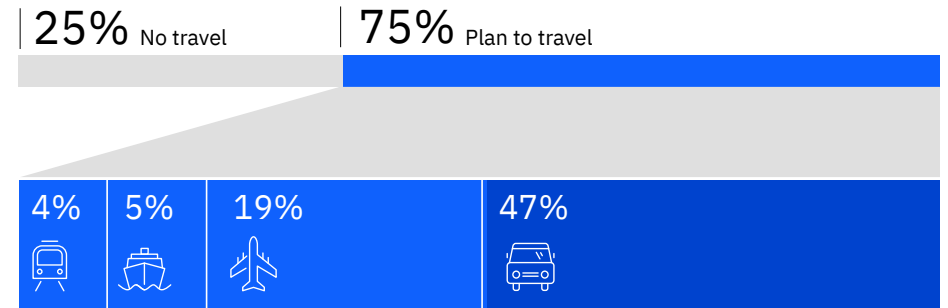
With respect to taking vacations, the long-term perspective of potential travelers is gloomy. Despite being under lockdown for months, one in four respondents indicate they still do not plan to travel for a long time. Nearly half (47 percent) of respondents appear eager to get out on the open road and take a journey by car. Meanwhile, only about one in five are interested in traveling by plane, and five percent or less have an interest in going on a journey by either train or cruise ship (see Figure 5).

Many hotels and other lodging providers are not likely to see full houses again until 2021. Fewer than 40 percent of respondents indicate they are likely to go on an extended vacation that will require a stay in a hotel room, resort, or vacation rental home in the first six months after “safer at home” orders expire. About 1 in 4 expect to do so within the next year, while more than a third have no plans to take an extended vacation.

**Figure 5**

### On the road

Most respondents plan to travel in the next three months, but nearly half expect to go by car.

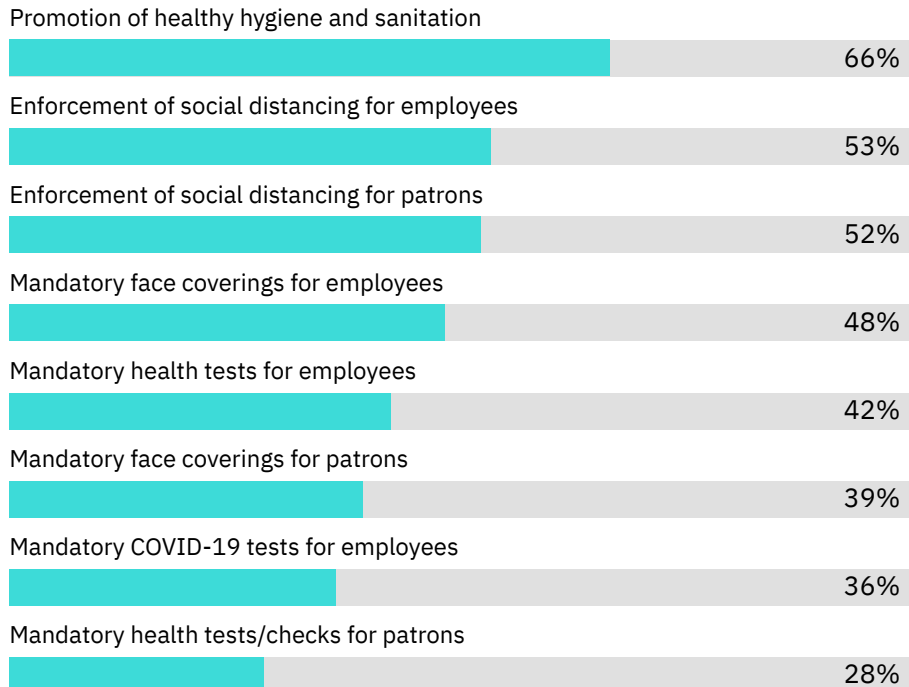


## Protective measures expected

As they begin interacting, many people expect businesses and venues to take protective measures so they feel safe and comfortable visiting in person. Two-thirds expect clearly communicated plans for, and the active promotion of, healthy hygiene and sanitation practices. Half say they expect social distancing for employees and patrons to be enforced, and 48 percent say they would feel comfortable if employees wore face coverings (see Figure 6).

### Figure 6 Safety first

Respondents picked the protective measures that would make them feel safe visiting a business or venue.



## Returning to a workplace presents a unique opportunity and challenge

The COVID-19 pandemic has created genuine concern among individuals about their own futures. Nearly 40 percent say the pandemic has made them worry about the security of their job.

This is not surprising given that as a direct result of the COVID-19 crisis, 20 percent of Americans surveyed indicate they have either been temporarily furloughed or permanently laid off by their employer. Four percent of employees indicate their employment has been terminated and 15 percent may still be employed, but they are no longer receiving a paycheck from their employer.

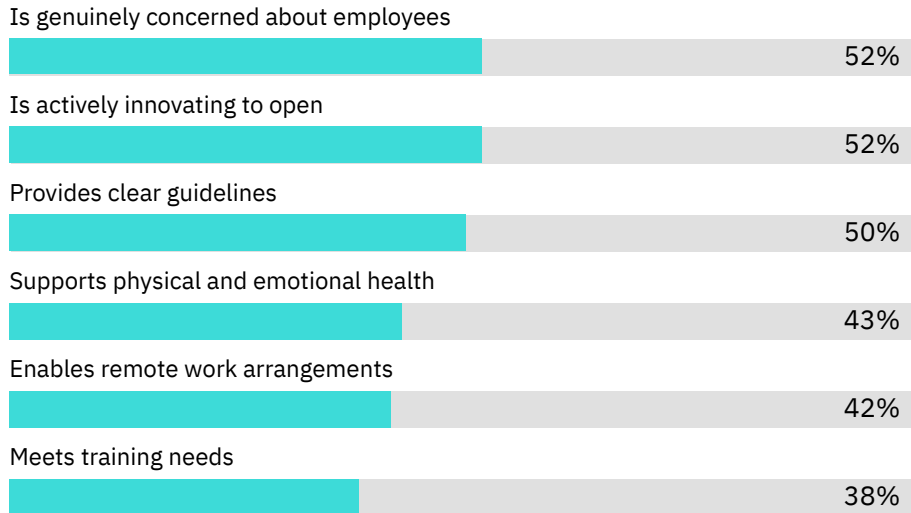
Employers get mixed reviews from employees as to their response to the COVID-19 crisis and how they're taking care of their people. Fewer than one in four workers trust their employers to make informed and ethical decisions that consider both the economic implications and the health and well-being of individuals and communities when returning to the workplace.

Even so, about half of employees surveyed say that their employer is genuinely concerned about them, they're receiving clear guidelines, and their employer is actively innovating to keep the business running.

However, most employees indicate their employers are not adequately meeting training needs, enabling remote work arrangements, or supporting their physical and emotional health (see Figure 7).

### Figure 7 Back to work

Employees give their employers mixed reviews on their COVID-19 responses.

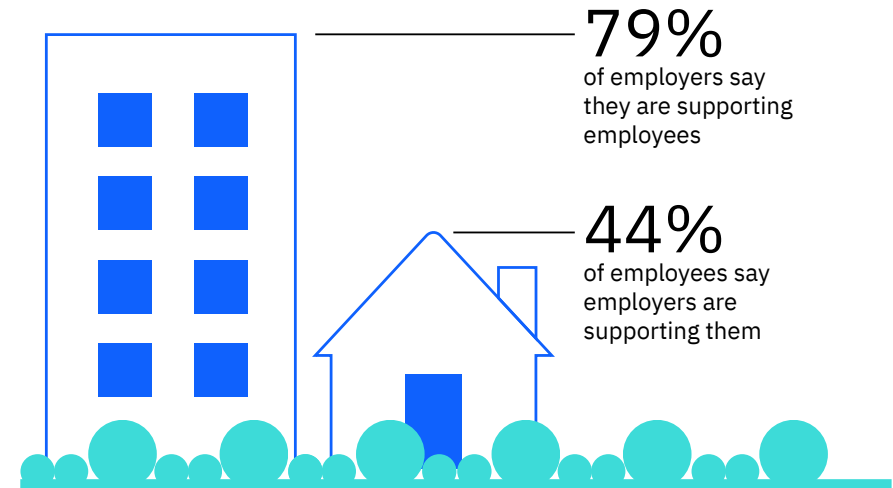


Interestingly, while three-quarters of executives report they are successfully helping their employees learn the skills they need to operate in the new way, only a third of employees agree.

Similarly, 79 percent of employers say they are adequately supporting the physical and emotional health of the workforce, while only 44 percent of employees say the same (see Figure 8).

### Figure 8 Finding the disconnect

Employers say they're supporting employees' well-being, but employees don't always agree.



## Employees have clear expectations around workplace safety

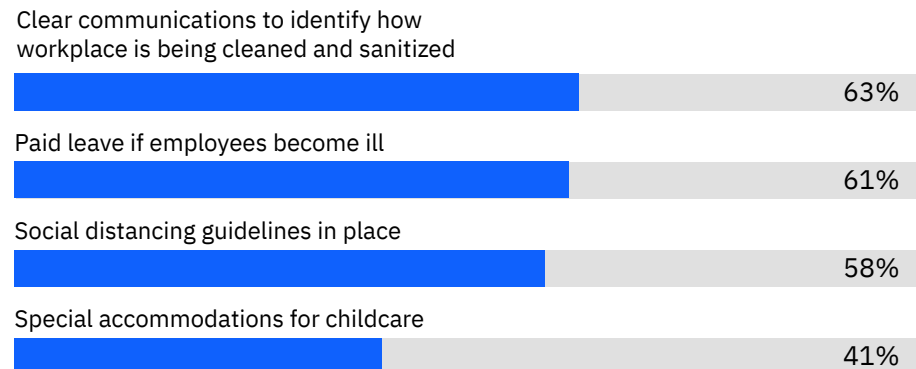
When asked what employers should have in place in order to return to normal work operations, many respondents strongly expect their employers to take a broad and active set of measures to protect them from exposure to the virus, and to provide them flexibility to protect their mental health and well-being.

More than half of respondents say there must be clear communication protocols in place to notify employees of what is being done to sanitize the workplace. And half also indicate that employers should clearly communicate plans for handling another outbreak—as well as provide paid leave for people who are sick or demonstrate symptoms of being sick.

Meanwhile, nearly half expect that employers should maintain social distancing in the workplace and nearly 1 in 3 strongly expect their employer to provide special accommodations for individuals to address childcare needs (see Figure 9). Overall, respondents appear to be somewhat more demanding as more organizations return to the workplace. The numbers below reflect results from July 2020.

### Figure 9 High expectations

People expect their employers to take a broad set of actions to protect them from exposure to COVID-19.



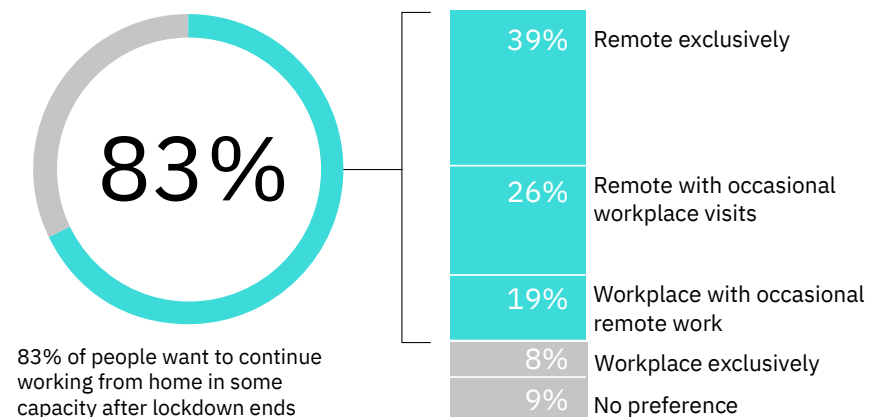
## Remote working options continue growing in popularity

Prior to the COVID-19 lockdown, only 10 percent of individuals indicated they were working from home. By July 2020, that percentage had quadrupled to nearly 45 percent.

While employers received mixed reviews on their handling of the pandemic, one thing they could do that would appeal to most employees is offer continuing options to work from home. Of those currently working remotely, 80 percent indicate they would like to continue to work away from the office at least occasionally, while 58 percent would like this to be their primary way of working (see Figure 10). In fact, of those individuals who are now working remotely full-time, only one in ten say they want to return to their workplace exclusively.

### Figure 10 Virtual reality

The pandemic has increased people's desires to work remotely.



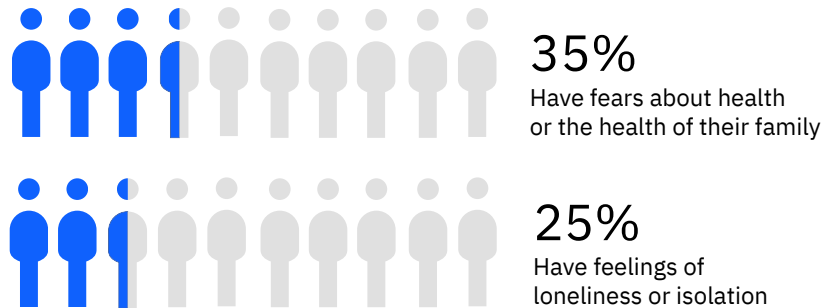


Fewer than one in five employees working from home cite technical and management challenges, but more than one-third cite fears about the health of their family and themselves as the greatest challenge working from home. Of those employees surveyed, one in four cite mental health impacts (such as feelings of loneliness or isolation and lack of motivation) and challenges meeting family and childcare obligations.

Before COVID, about a third of people say they had few interactions with other individuals on a daily basis. And stay-at-home restrictions are almost certain to exacerbate feelings of isolation for those who live alone. Eighteen percent of Americans surveyed indicate they live alone, and more than one in ten experience an even more solitary circumstance: living alone, without the company of even a pet. One-quarter of respondents expressed feelings of loneliness and lack of motivation, brought on by the lockdown (see Figure 11).

### Figure 11 Social distancing impacts

Stay-at-home restrictions are exacerbating health fears and feelings of isolation or loneliness.

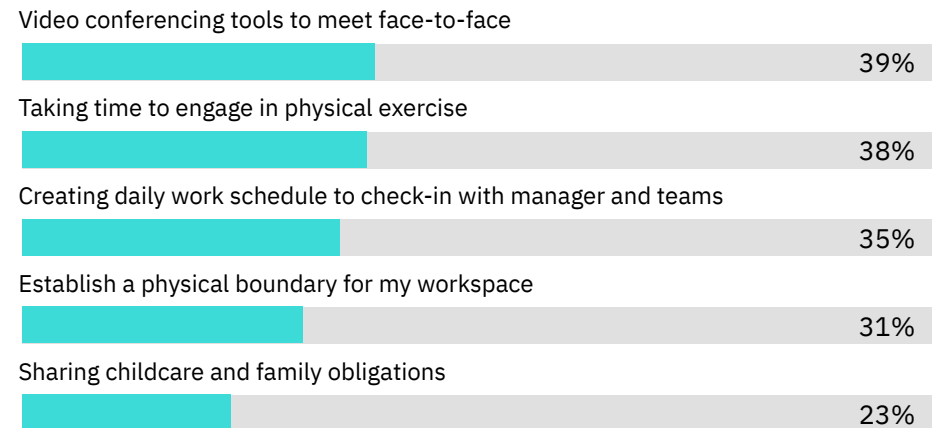


Prior IBV research suggests those living alone—regardless of age or gender—have a higher prevalence of common mental health disorders and that this may largely be explained by loneliness.<sup>2</sup>

To mitigate these concerns to the best of their ability, employees are increasingly finding their own techniques for improving personal interactions, creating alone time/ personal space, and sharing family obligations (see Figure 12).

### Figure 12 Redefining work-life balance

Employees are getting creative to connect with others—and set boundaries—as working from home becomes more normal.



## Contact tracing gains support

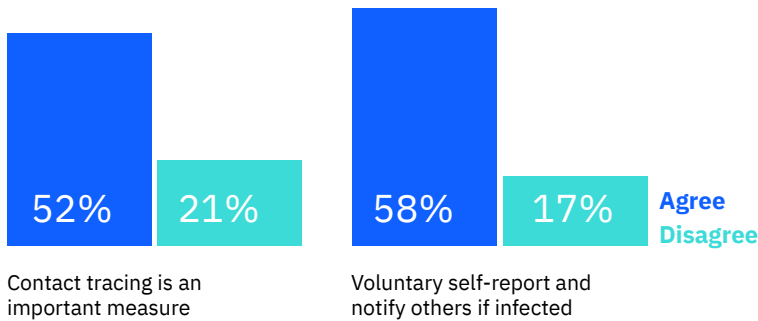
Given that most people expect COVID-19 to be with us for the foreseeable future, and that they expect another outbreak in the future, it isn't surprising that most support contact tracing, at least conceptually. Even so, significant trust issues exist which will likely create friction in implementing this capability broadly in the US.

Most people say contact tracing is an important measure to take in order to prevent the spread of COVID-19 and most indicate they would be willing to voluntarily share their data to support it. More than half of respondents say contact tracing is an important measure that should be taken to control the spread of COVID-19 (see Figure 13). And 45 percent indicate they expect their employers to have a clearly communicated plan for contact tracing in order for them to return to normal work operations.

**Figure 13**

### Back to the source

Most people see a need for contract tracing and would voluntarily share their data to support it.



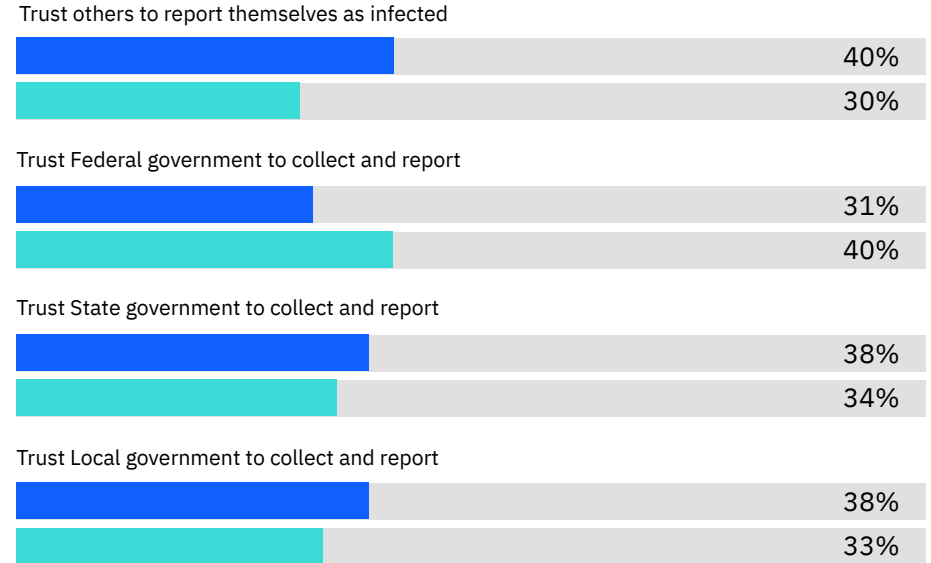
Yet, trust issues may make contact tracing a harder sell in the US than in other countries. While nearly 60 percent say they will voluntarily self-report, only 40 percent say they trust others to do the same. The US government is the least trusted entity, with only 31 percent saying the federal government can be trusted to collect and protect personal information and data for contact tracing. Private sector companies fared only slightly better (32 percent). State and local governments fared best, but still only 38 percent say these entities are trustworthy (see Figure 14).

**Figure 14**

### Trust issues

US citizens' lack of confidence in the government—and in each other—could make contact tracing a hard sell.

Agree  
Disagree



This IBV consumer research is continuing, and we plan to add new questions in the future. Clearly, nothing is “business as usual,” and it may not be for some time. To prepare for what’s next, we will continue to deliver business intelligence that helps leaders navigate disruption. Visit our collection of COVID-19 research at [ibm.co/covid-19-trilemma](https://ibm.co/covid-19-trilemma) to see what’s new.

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## Notes and sources

- 1 IBM Institute for Business Value Market Research Insights Survey of more than 54,000 adults, April-July 2020.
- 2 Fraser, Heather and Palmarini, Nicola. “Loneliness and aging: Navigating how business and government can address an enduring crisis.” IBM Institute for Business Value. March 2020. <https://www.ibm.com/thought-leadership/institute-business-value/report/loneliness>

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