

Pharmaceuticals & Medical Products Practice

Survey: In the US, people say their use of masks may endure

Americans are largely optimistic about COVID-19's progression, according to a new survey, and their responses suggest that the use of face masks will remain commonplace in the months ahead.



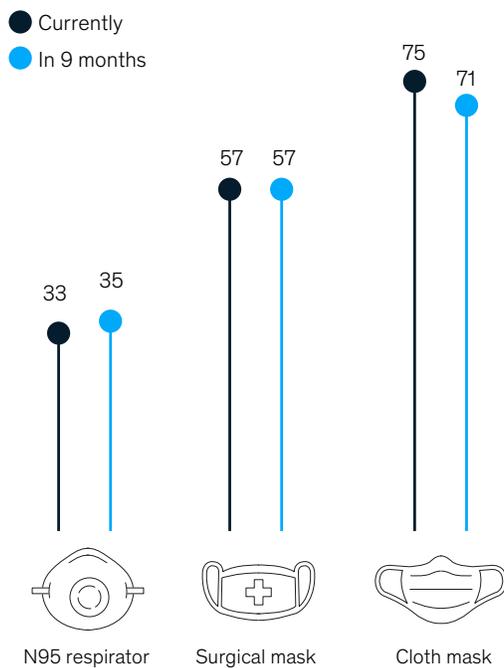
As shelter-in-place restrictions lift across the United States, more businesses reopen, and most states require face coverings in public settings,¹ results from a new McKinsey survey indicate that US consumers are meeting the next normal with their masks on.² The use of masks and respirators is nearly universal across the country, with 97 percent of all respondents saying they wear a mask at least once in a typical week.³

Furthermore, mask wearing is a behavior that may endure. A majority of respondents say they expect to wear masks nine months from now,⁴ and they also report a generally optimistic outlook on COVID-19 (Exhibit 1). Eighty-eight percent believe the country's infection rate will be lower or the same in nine months, whether or not a vaccine is available, while only 12 percent of respondents believe the COVID-19 situation will get worse. Beyond the near-

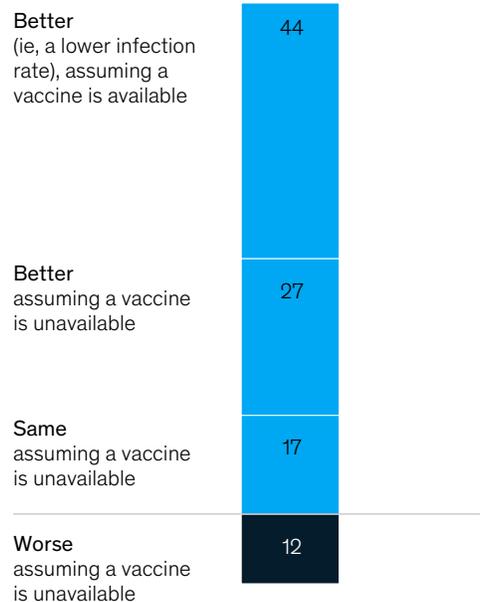
Exhibit 1

Most respondents expect to wear masks nine months from now, when many believe the COVID-19 infection rate will be lower.

Personal use of face coverings over time,¹
% of respondents reporting at least weekly use



Expectations for COVID-19's progression in the US, in 9 months,² % of respondents



¹Question: Currently, what is your typical weekly usage of new personal protective equipment (PPE) (and not reused) outside work (eg, for personal use)?
²Question: Nine months from today, do you expect the COVID-19 situation to be better (ie, a lower infection rate), worse, or the same?

¹ As of July 1, 2020, 35 states and the District of Columbia had implemented regulations requiring the use of masks in public settings. National Governors Association, nga.org.
² Between May 28 and June 8, 2020, McKinsey surveyed 1,021 respondents whose demographic profile is representative of the US population with respect to gender, age, region, ethnicity, and household income.
³ The use of cloth face coverings in public settings is in line with guidance from the Centers for Disease Control and Prevention. "Use of Cloth Face Coverings to Help Slow the Spread of COVID-19," June 28, 2020, cdc.gov.
⁴ Respondents were asked about their COVID-19 outlook and use of personal protective equipment (PPE) in a nine-month time frame to correspond with the potential development of a vaccine by Q1 2021. They were also asked about their use of face masks and N95 respirators in the next three months and the next six months, and there was very little difference in rates of expected usage across the three time horizons.

consensus on mask use and the COVID-19 outlook, the survey results point to a few patterns in how and where people are using masks. First, respondents who are male and younger in age—who are most likely to be back at the workplace, and more likely to have jobs that require face coverings—report higher rates of medical-grade mask use than others. Second, the use of cloth masks is consistently high across geographies, though the use of medical-grade masks is more prevalent in larger cities and urban areas. And third, respondents tend to use their preferred type of mask regardless of their destination.

use of face masks is highest among respondents ages 18 to 64, particularly for medical-grade products. Adults 65 and older, a group that the Centers for Disease Control and Prevention has identified as one at higher risk of developing more serious complications from COVID-19,⁵ report the least frequent overall mask use. Only 13 percent of these respondents report wearing an N95 respirator at least once a week. By gender, men and women report similar use of both surgical and cloth masks. But 42 percent of men report wearing N95 respirators at least once a week, compared with 26 percent of women.

Respondents at work report higher overall mask use

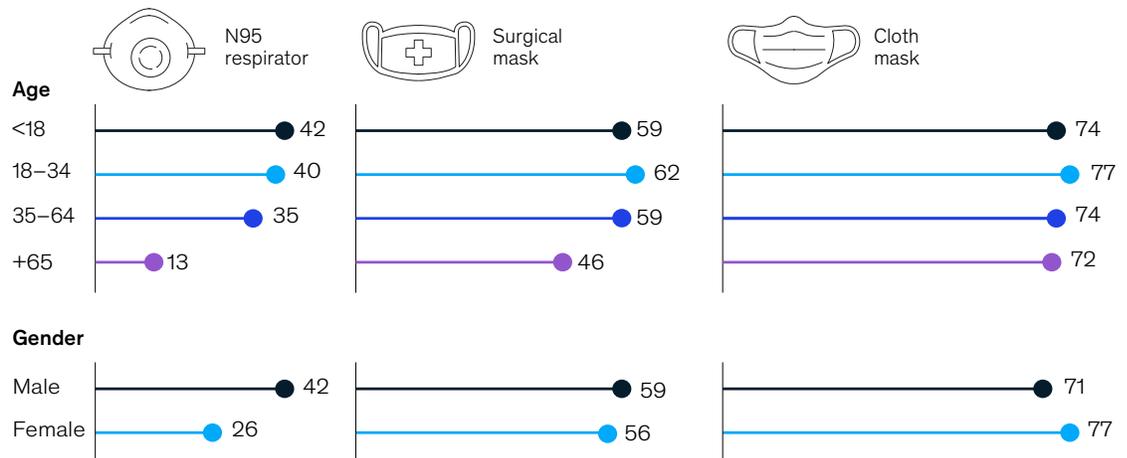
While mask wearing is reported broadly, the results indicate some notable differences based on age and gender (Exhibit 2). Across age groups, the weekly

Younger respondents and male respondents are also more likely than their counterparts to say they have returned to the workplace. At the time of the survey, more than one-third of all respondents report working on-site—and those who have gone back to the workplace report higher use of

Exhibit 2

Younger and male respondents report the highest use of face masks, especially for those that are medical grade.

Personal use of face masks,¹ % of respondents reporting at least weekly use



¹Question: Currently, what is your typical weekly usage of new personal protective equipment (PPE) (and not reused) outside work (eg, for personal use)?

⁵ "People Who Need to Take Extra Precautions," June 22, 2020, cdc.gov.

N95 respirators than those who have not returned (47 percent, versus 25 percent). By age, younger respondents (18- to 64-year-olds) report working on-site more than three times as often as respondents who are 65 and older (Exhibit 3). By gender, 43 percent of male respondents have returned to the workplace, compared with only 30 percent of female respondents.

Respondents report similar differences by age and gender in their reuse of N95 respirators at home (Exhibit 4). Those who continued to work on-site during the pandemic also report higher overall use of N95s, both on the job and for personal use, than others. Of all respondents who report using N95 respirators, younger respondents (ages 18–64) are nearly three times as likely as older respondents to report using the same N95 at work and at home. By gender, 57 percent of male respondents wear the same N95 respirator at home and at work, compared with 35 percent of female respondents.

Use of cloth masks is consistent, while use of medical-grade masks varies between rural and urban settings and by region

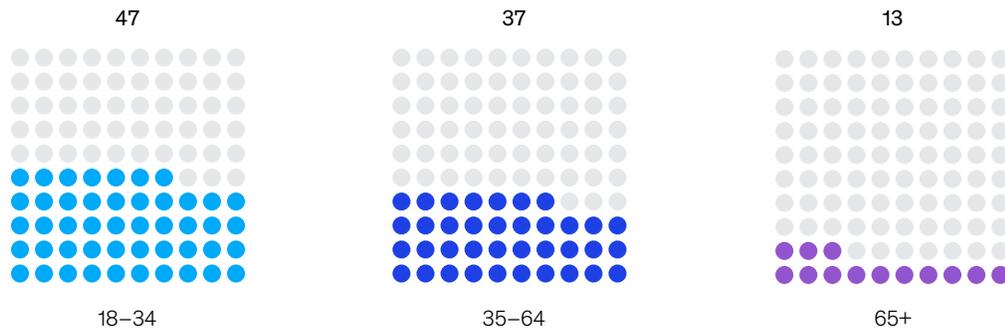
At the time of publication, 72 percent of US states had mandated the use of masks in public places (Exhibit 5)—which likely explains why the rate of wearing cloth masks is consistently high regardless of respondents’ geographic location (Exhibit 6).⁶

For N95 respirators and surgical masks, there are notable differences in use based on the setting. Respondents in larger cities, where residents are in closer proximity, are more likely than those in rural areas, the suburbs, and smaller cities to report the use of medical-grade masks, especially N95 respirators. When comparing the use of medical-grade masks by region, respondents in the Midwest report the lowest rates of wearing both surgical masks and N95 respirators, while those in the Northeast report the highest rates of wearing N95 respirators.

Exhibit 3

Younger respondents are more than twice as likely as their older counterparts to report working on-site.

Rate of return to on-site work,¹ % of respondents



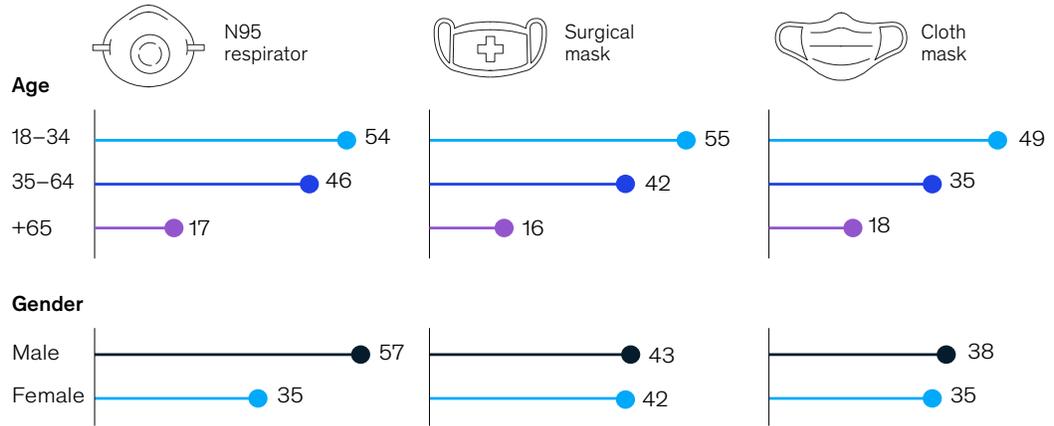
¹Question: Are you physically back to work at your company site?

⁶ Coronavirus Policy and Guidance Documents, National Governors Association, July 1, 2020, nga.org.

Exhibit 4

Younger and male respondents are more likely than others to say they use the same N95 respirators at work and at home.

Reuse of work masks for personal purposes,¹% of respondents

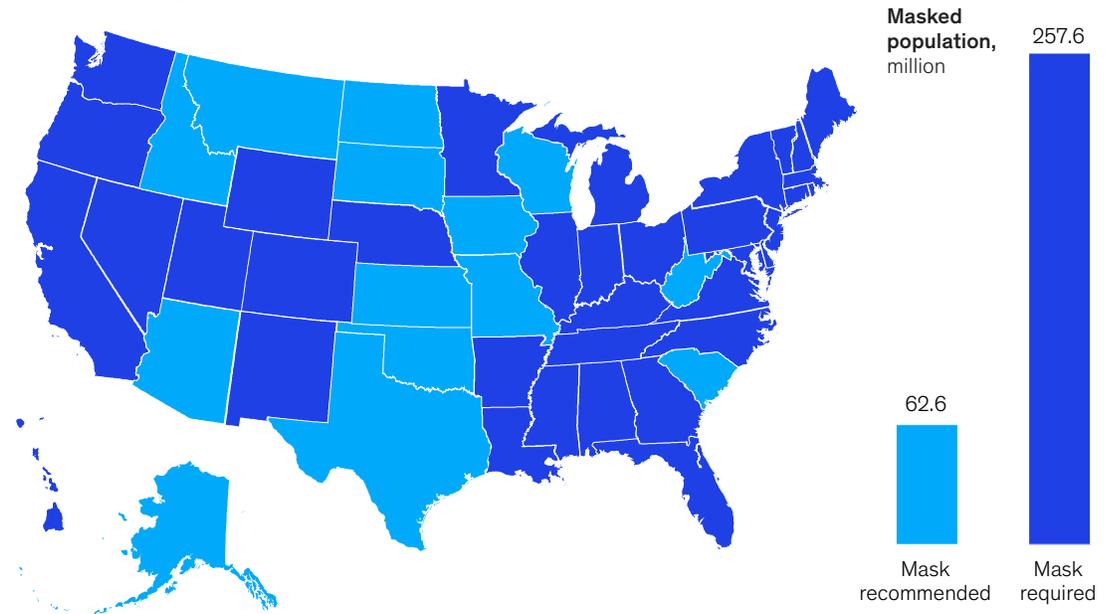


¹The figures above reflect the percentages of respondents who, for each type of mask, said they were using it at least once a week outside work.

Exhibit 5

Currently, 72 percent of all US states require the use of masks in public.

States requiring masks in public spaces

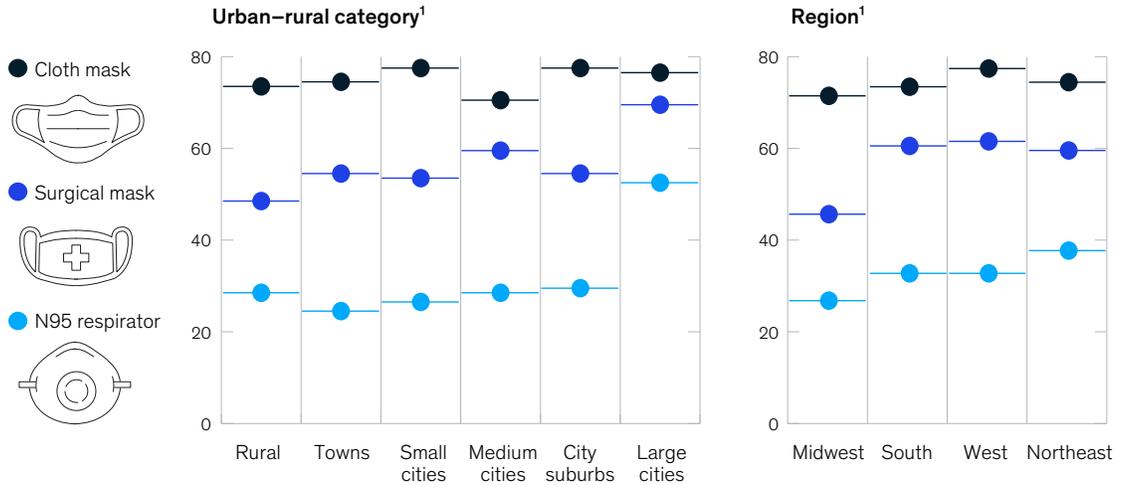


Source: National Governors Association, May 27, 2020, data; US Census, 2019

Exhibit 6

Respondents in large US cities and in the Northeast are the most likely to report the use of N95 respirators and surgical masks.

Mask use by geography, % of respondents reporting at least weekly use



¹Question: Currently, what is your typical weekly usage of new personal protective equipment (PPE) (and not reused) outside work (eg, for personal use)? The Midwest includes Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin. The South includes Alabama, Arkansas, Delaware, the District of Columbia, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, Tennessee, South Carolina, Texas, Virginia, and West Virginia. The West includes Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, and Wyoming. The Northeast includes Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, and Vermont.

Respondents wear their preferred type of mask wherever they go

Finally, respondents report using masks in a variety of public places—and the type of mask used varies little by the destination (Exhibit 7). Whether they are going to a grocery store or pharmacy for essential errands, to an office building, or on public transportation, respondents most often report the use of cloth masks, followed by surgical masks and N95 respirators. For every type of mask, use is the highest in enclosed spaces where people can expect to encounter those from other households (for example, a retail or grocery store) and lower in outdoor settings or gatherings of friends.

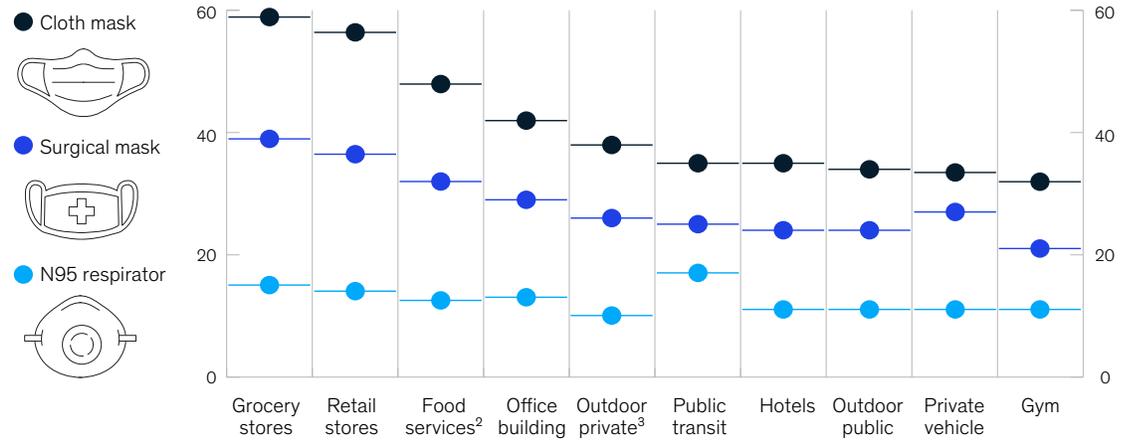
Over time, individuals' commitment may be the biggest variable in the use of masks

While the survey reveals a clear consensus on the use of face coverings at least once a week, lagging usage in several settings suggests that some consumers' initial concerns about COVID-19 may be beginning to fade. As COVID-19 continues to unfold, many elements will guide public opinion and behavior: for example, government and business policies about face coverings, recommendations from public-health agencies, access to safe and effective face coverings, and the virus's epidemiological progression. But ultimately, the US public's personal motivation and commitment to mask wearing will shape how, if at all, the use of face masks evolves in the months ahead.

Exhibit 7

Respondents use masks in a variety of public places, and cloth masks are used most commonly across destinations.

Personal use of face masks in public places,¹ % of respondents



¹Question: Choose all situations from the list below where you use each type of personal protective equipment (PPE). For each setting, respondents were able to select all types of PPE that applied; the types of PPE that were asked about but not shown include disposable gloves, eye protection, and medical gowns.

²For example, restaurants and food pickup.

³For example, an outing or gathering with friends.

The survey content and analysis were developed by **Priya Chauhan**, a consultant in McKinsey's New Jersey office; **Sonja Hellstrom**, a consultant in the Washington, DC, office; and **Joe Hughes** and **Josh Rothenberg**, a senior partner and associate partner, respectively, in the Chicago office.

They wish to thank Tony Gambell, Ryan Miller, and Anika Ranginani for their contributions to this work.

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