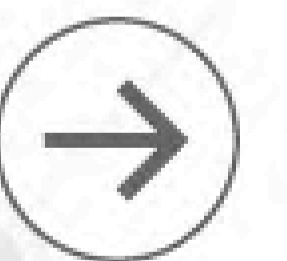


WIN**BIG**MEDIA x resonate

UNDERSTANDING
U.S. CONSUMER/SENTIMENT
DURING THE CORONAVIRUS PANDEMIC





INTRODUCTION

We are all adjusting in real time to a global pandemic that the world hasn't experienced since 1918. Our lives have been thrown into disarray on multiple levels — as individuals, family members, consumers, managers and business leaders.

In a short period of time, businesses have shifted to remote work, families are required to social distance, and, in many states, there are mandatory stay-at-home edicts in place.

This all happened incredibly quickly as government and public health officials worked to prioritize citizens' health while slowing the spread of the COVID-19 virus. But it is clear there are significant impacts to consumer behavior and to broad swaths of our consumer-driven economy that are not yet fully understood.

This research, fresh out of field in recent days, serves to shed light on both actions being taken and concerns being felt by consumers around COVID-19 and its impact on everyday lives. Our research also begins to understand the changes in consumer behavior that will help businesses in a variety of Business-to-Consumer verticals start to understand the changes that have taken place and how to build a path forward once we inevitably reach the other side of this pandemic.

We intend to refresh this research in a few weeks' time to see how consumer attitudes are evolving and to gather additional information in other vertical segments that will further complete the picture of the new world in which we live.



METHODOLOGY

Technically, this survey was fielded between March 22 - March 29, 2020 to a total sample of 4,888 respondents. All research was fielded to U.S. respondents, as our interest is in depth of understanding of U.S. consumers.

This survey was a re-contact to recent survey respondents from a full wave of research fielded between January 28, 2020 – March 9, 2020. Fielding this research as a re-contact allowed us to connect the recently gathered COVID-specific responses to the thousands of other data points gathered from those respondents in previous research. While the original wave sample was gathered on a representative basis, this re-contact wave is unweighted.

The original wave of research was fielded to approximately 18,000 respondents and, as with all *National Consumer Study* research, is weighted and balanced to precisely represent the U.S. adult population across several dimensions.



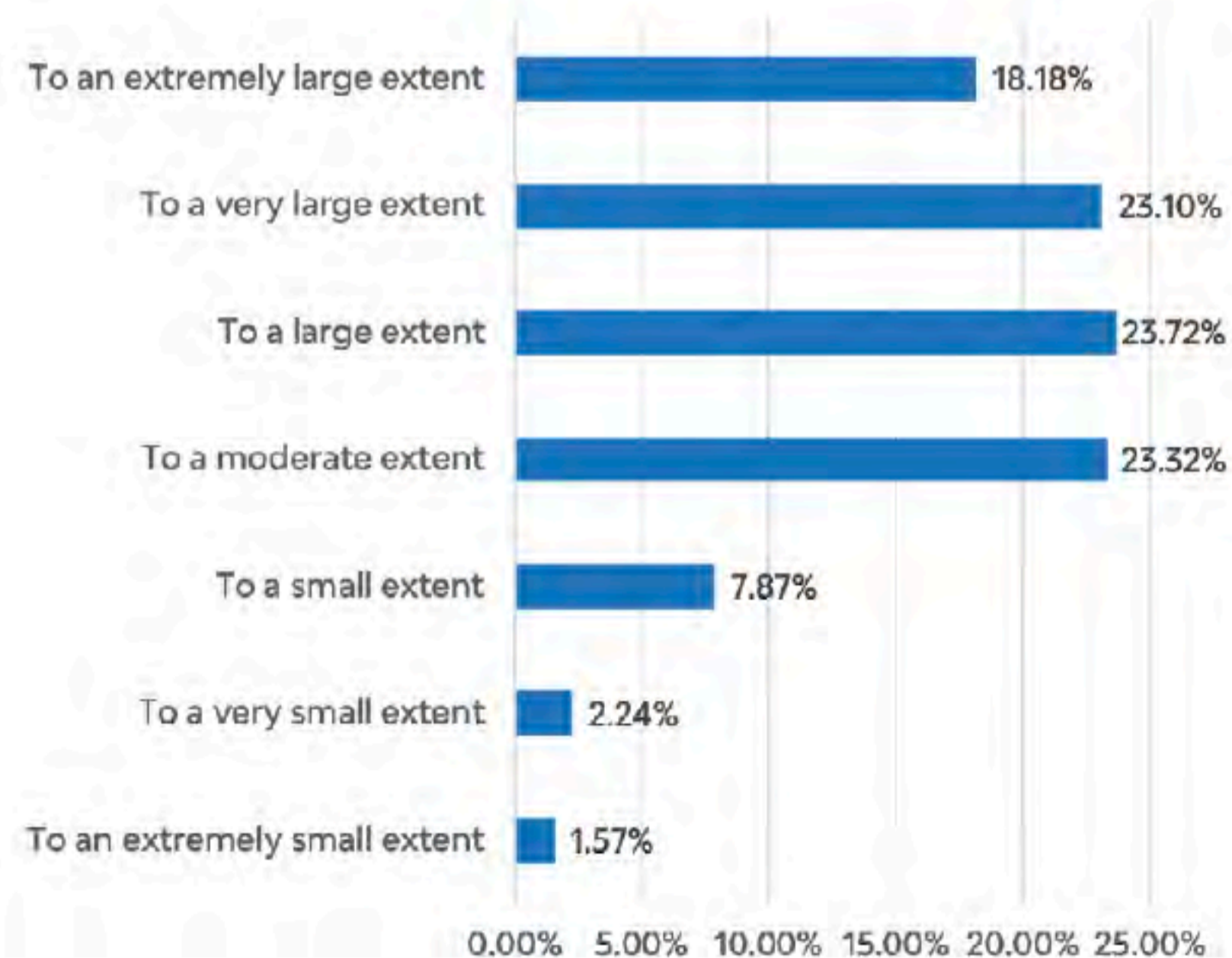


SENTIMENT



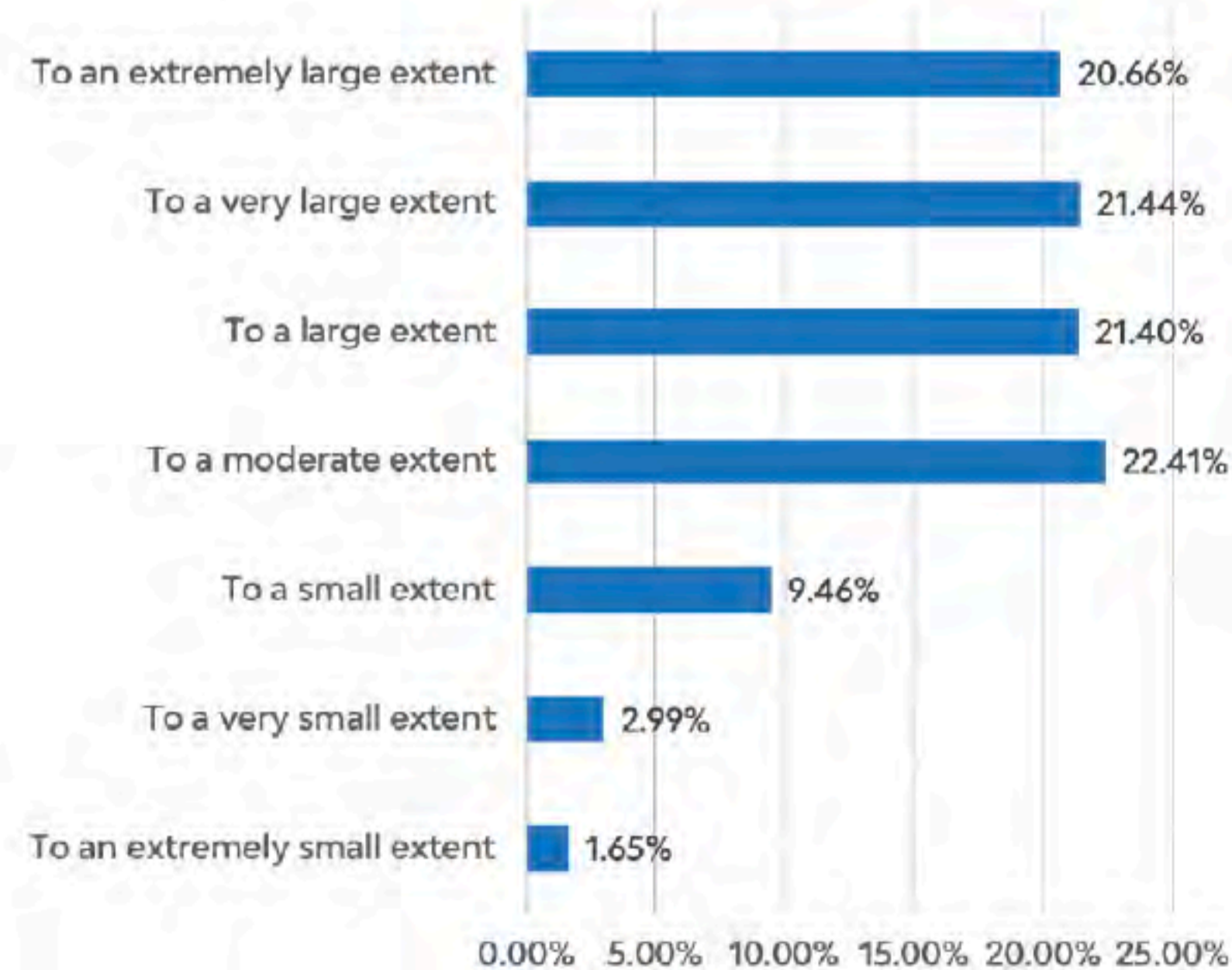
Q1

Overall, to what extent are you concerned about the coronavirus (COVID-19) situation?



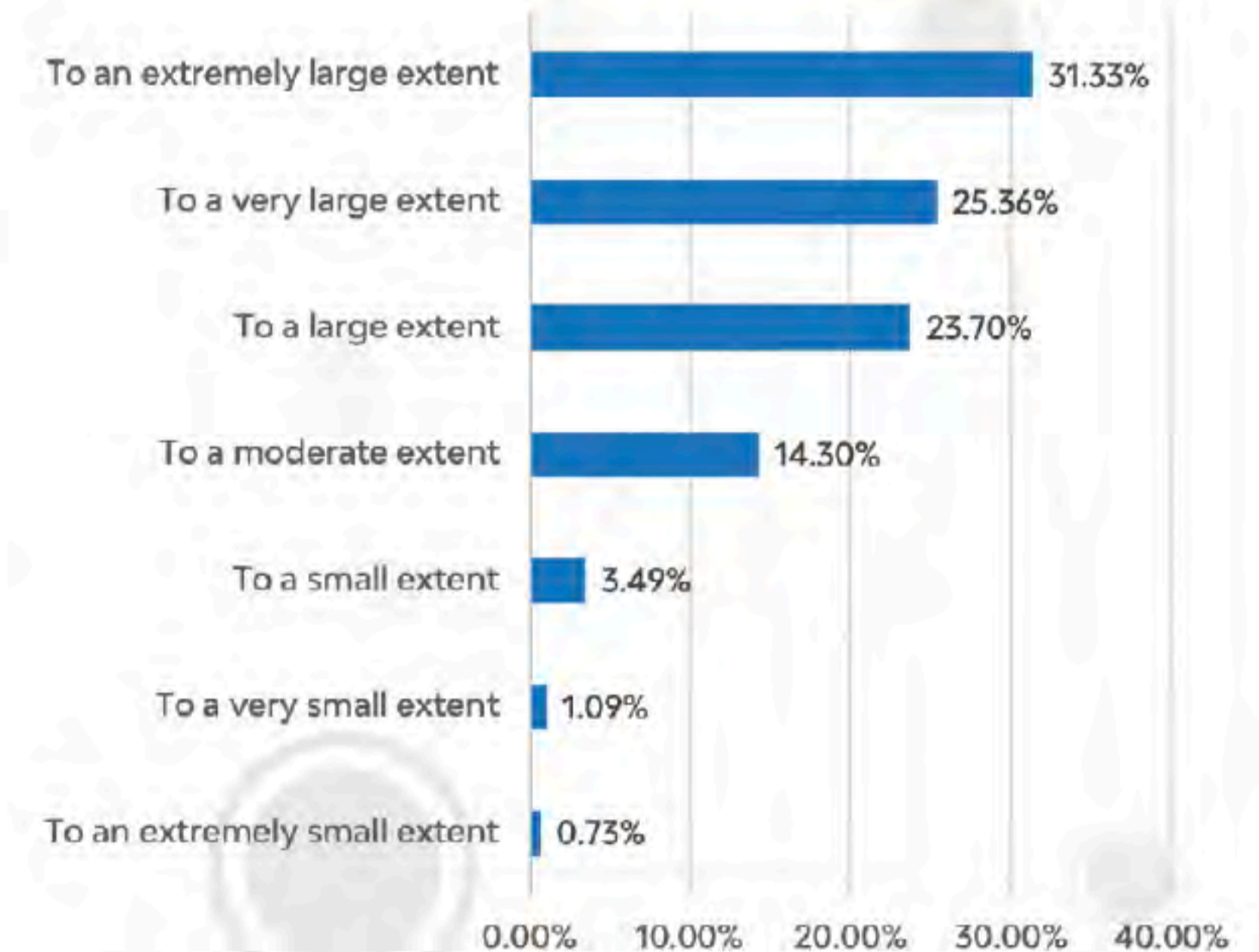
Q2

Overall, to what extent are you concerned about the health-related consequences of the coronavirus situation?



Q3

Overall, to what extent are you concerned about the economic-related consequences of the coronavirus situation?



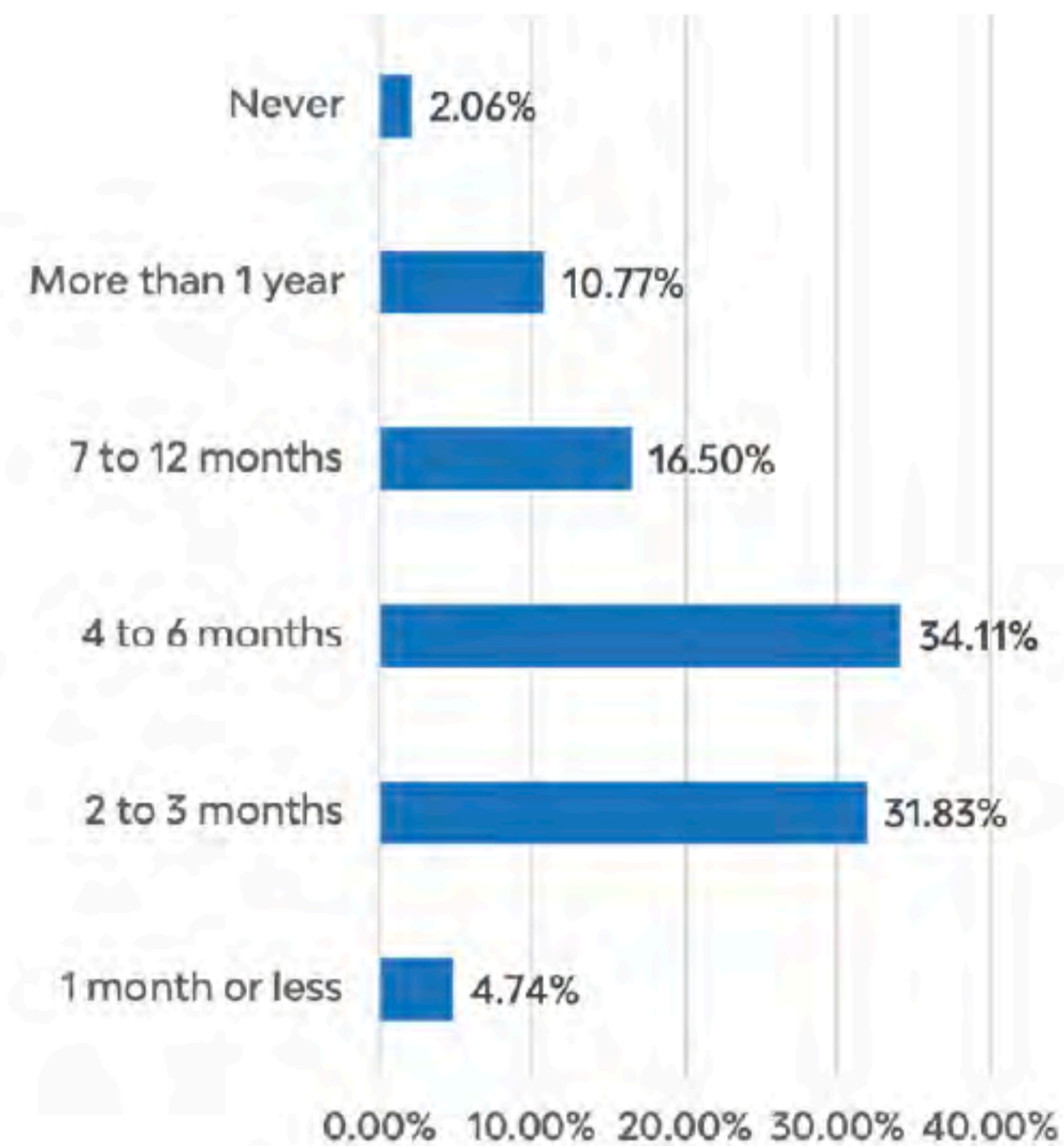


SENTIMENT



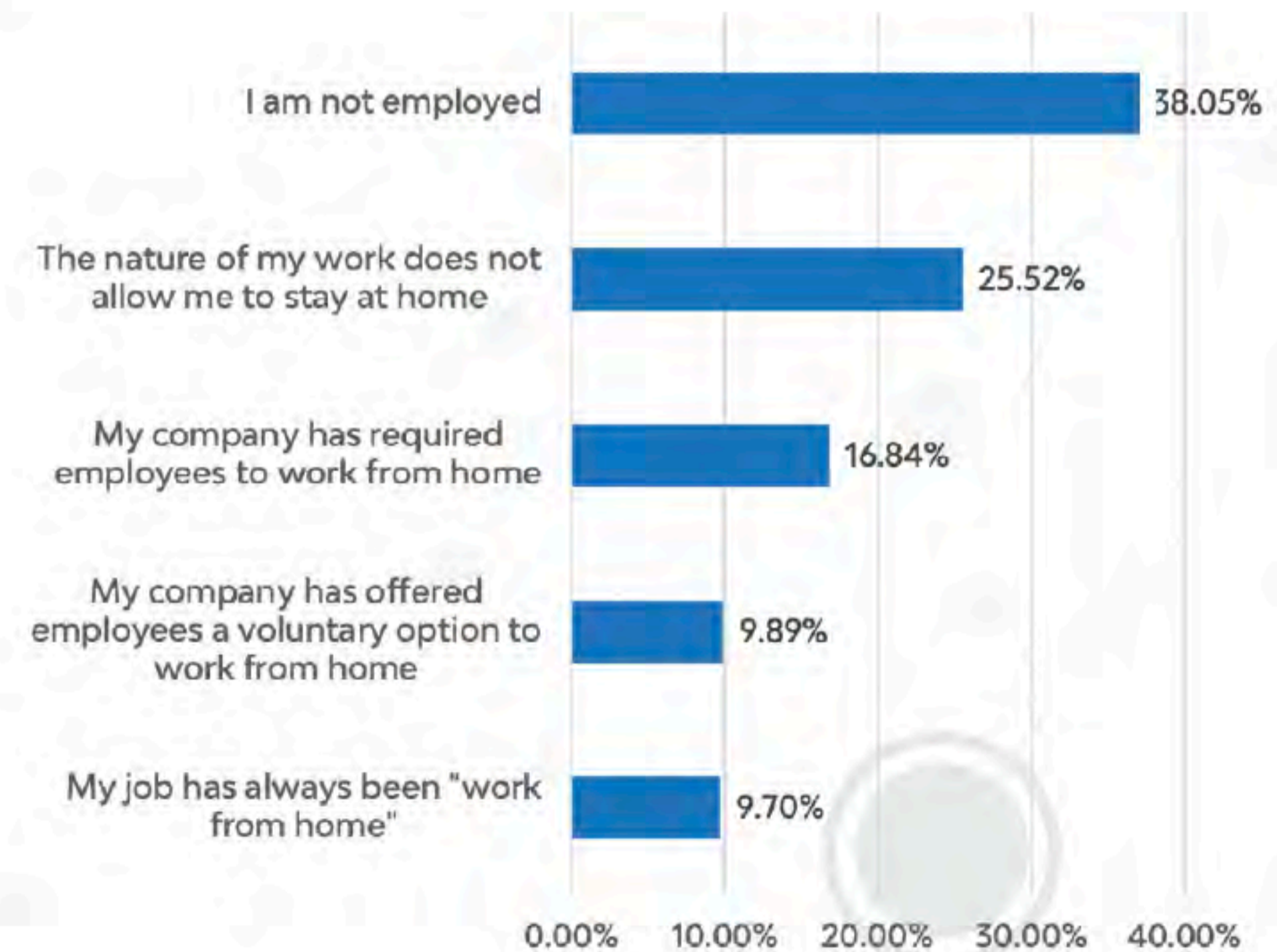
Q4

Thinking about the coronavirus situation, how soon do you believe that your life will largely return to "normal"?



Q5

Which of the following best describes your work situation?



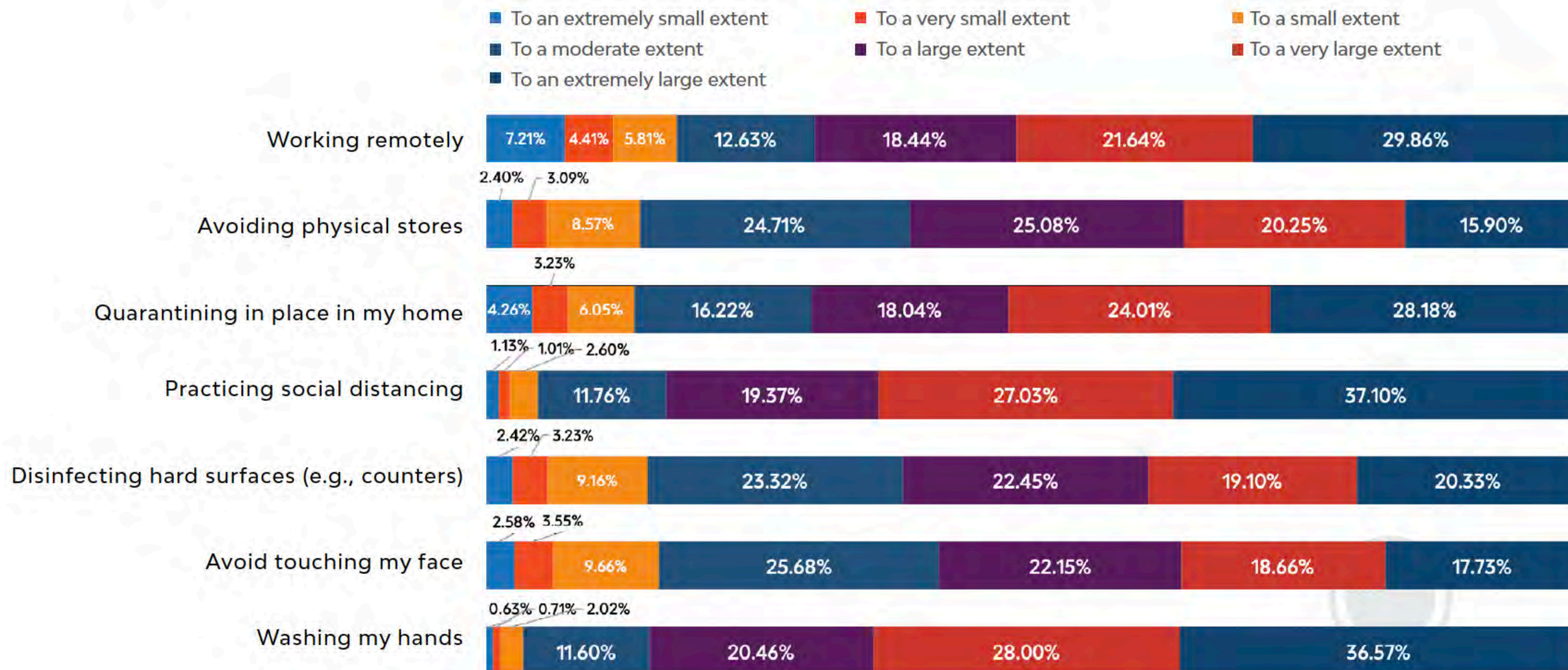


SENTIMENT



Q6

To what extent are you taking the following precautions to prevent yourself from contracting the coronavirus?



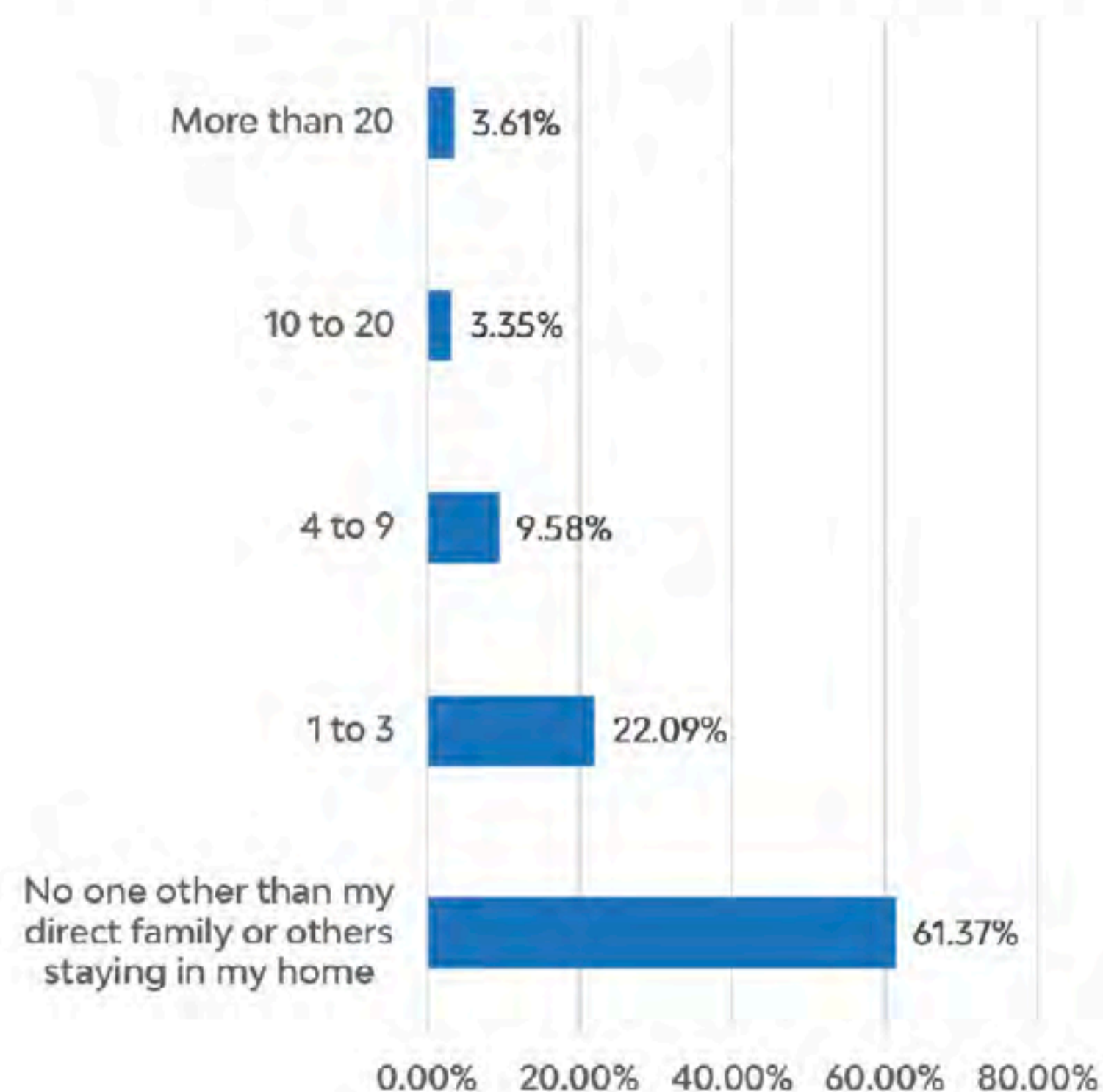


SENTIMENT



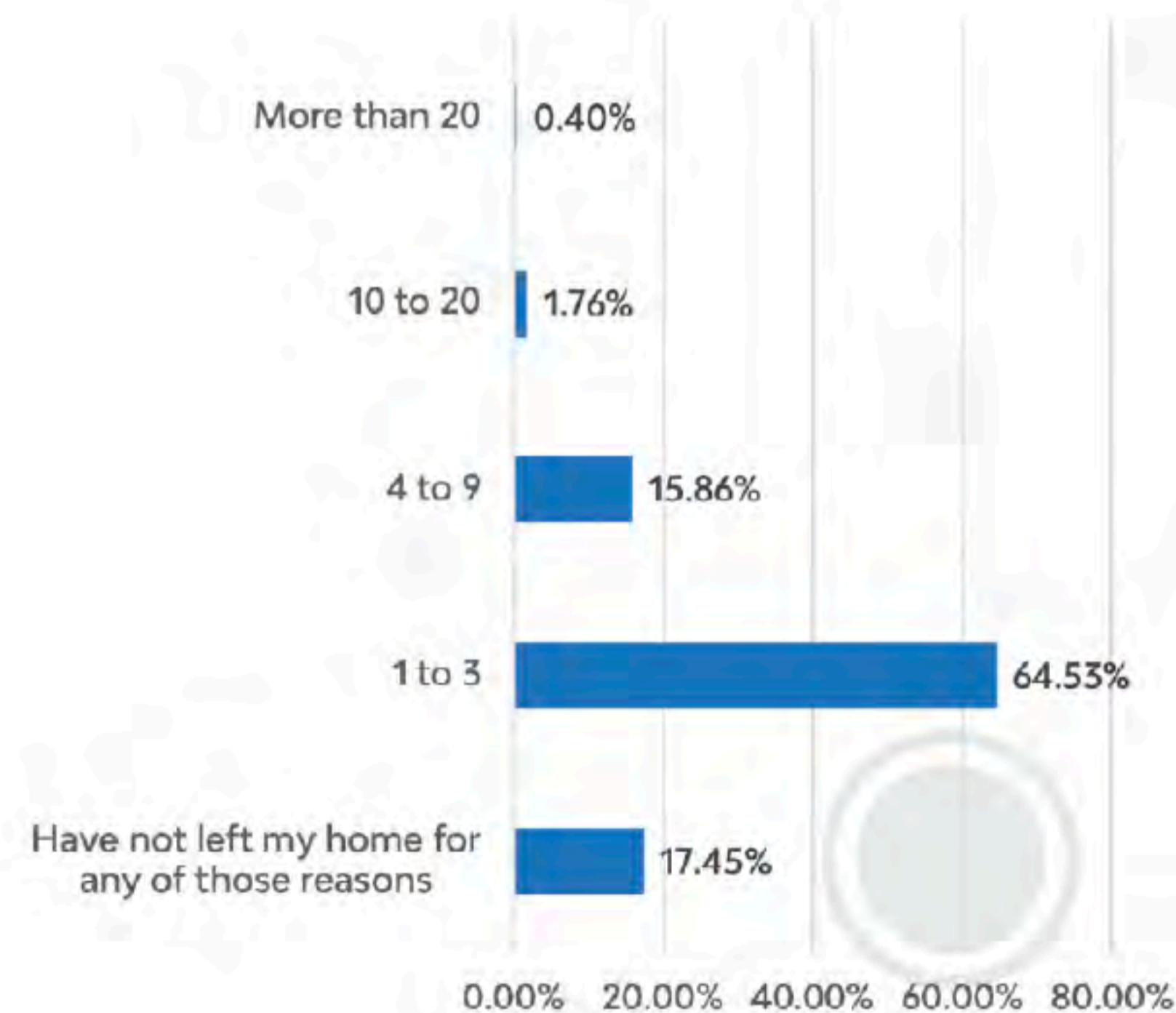
Q7

In the past week, with how many people have you come in physical contact (e.g., shaking hands) – other than your direct family or others staying in your home?



Q8

In the past week, how many times have you left your home in order to visit a store, restaurant or other retail establishment?

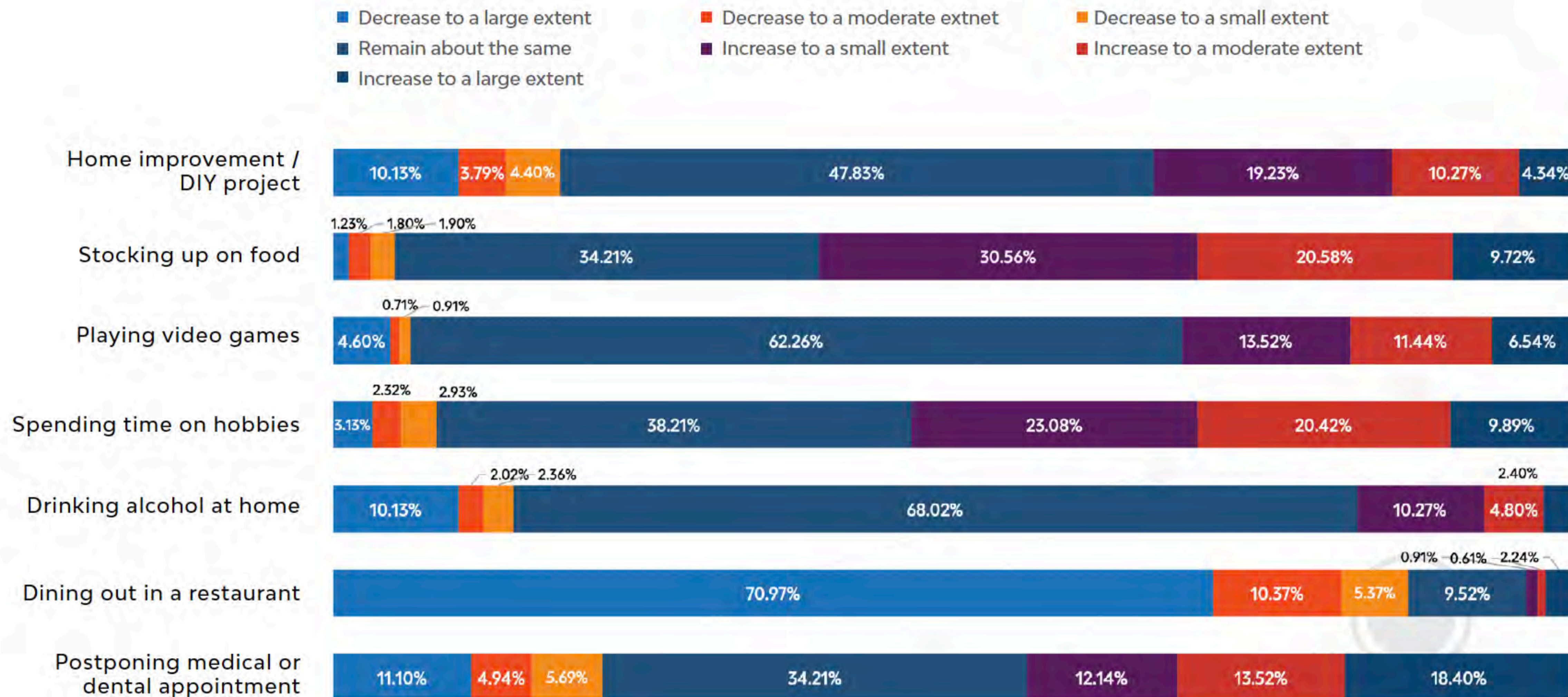




SENTIMENT



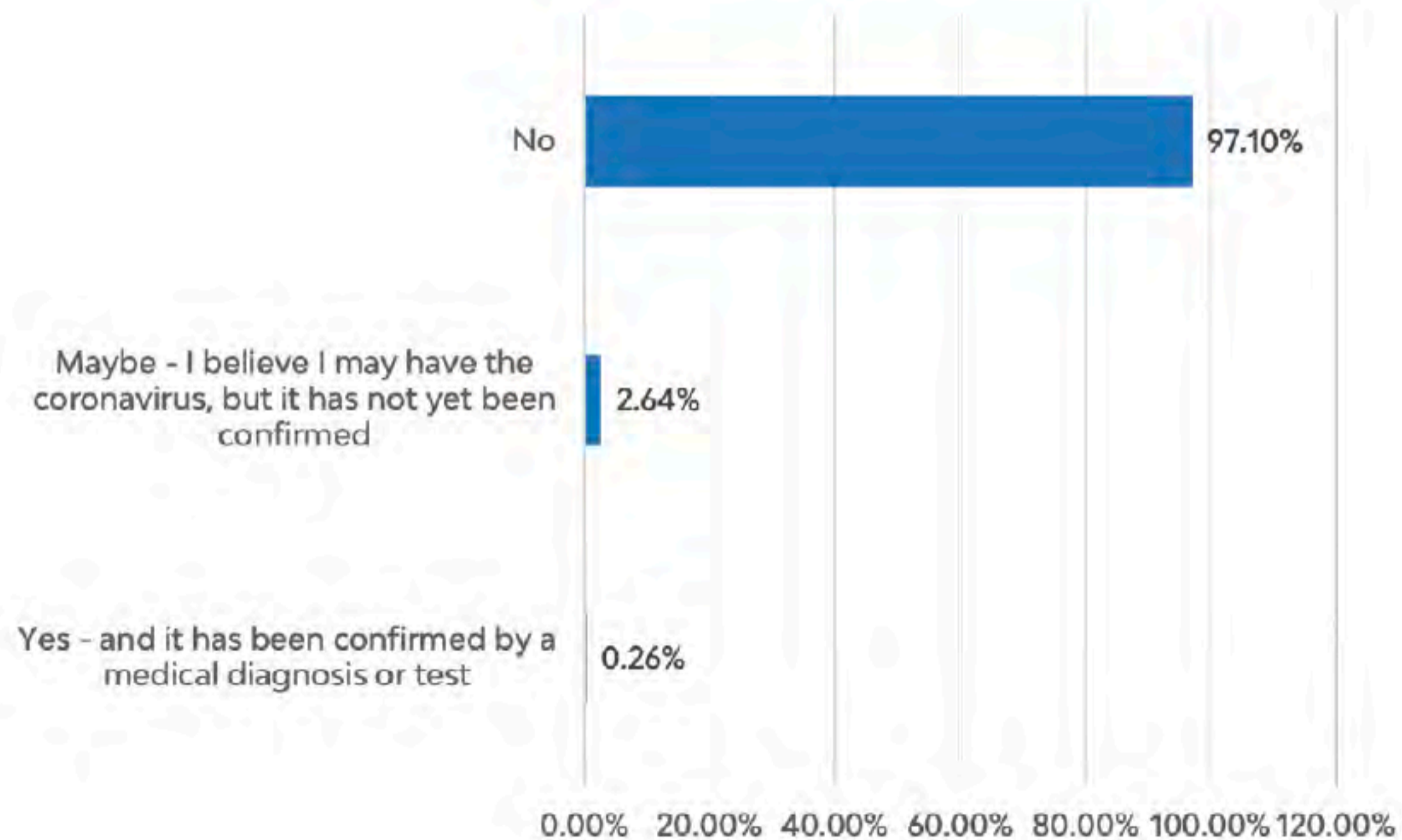
Q9 As a result of the coronavirus situation, how will the frequency with which you do the following change?



HEALTH

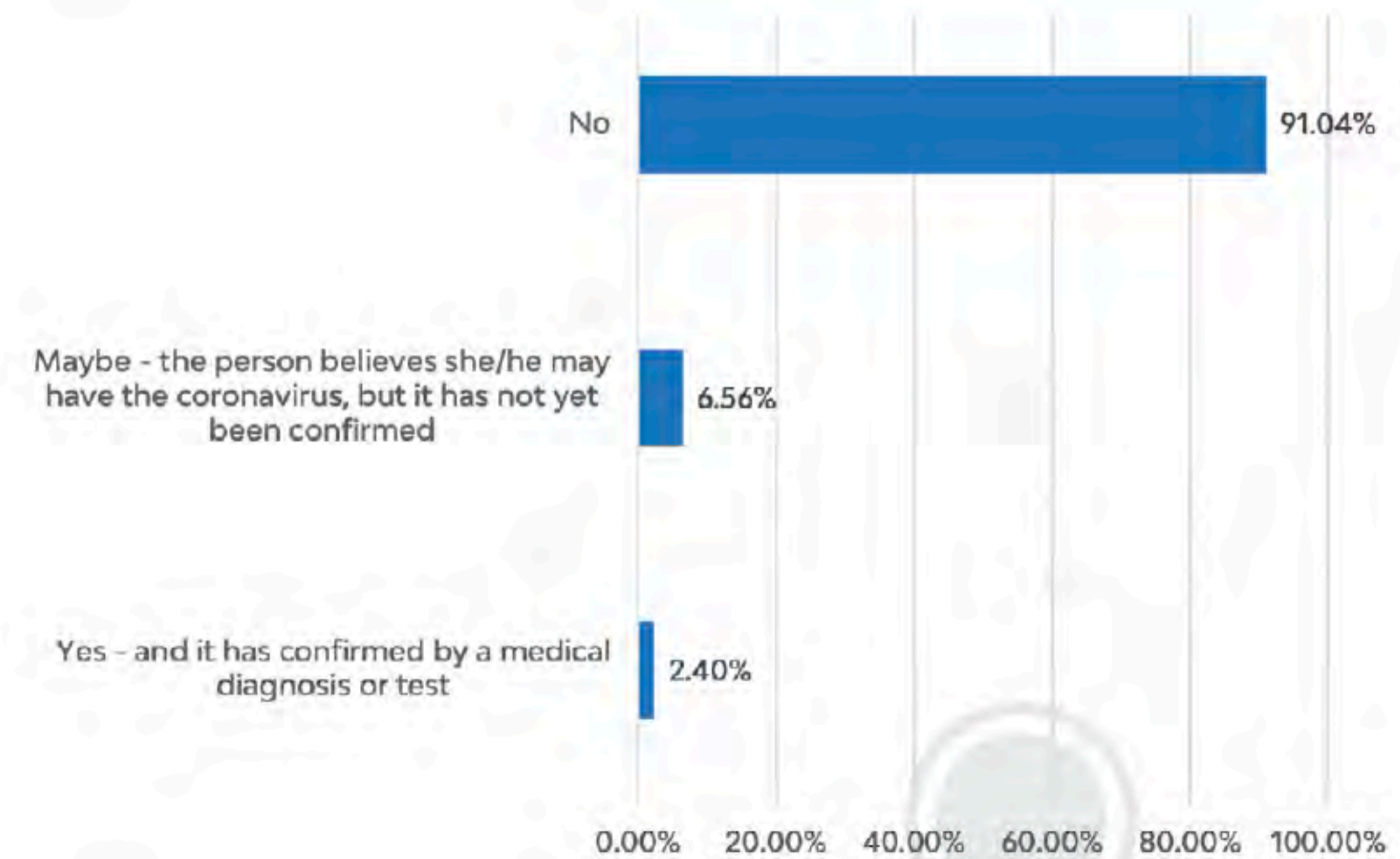
Q10

Have you personally caught the coronavirus?



Q11

Has a family member, friend or colleague caught the coronavirus?

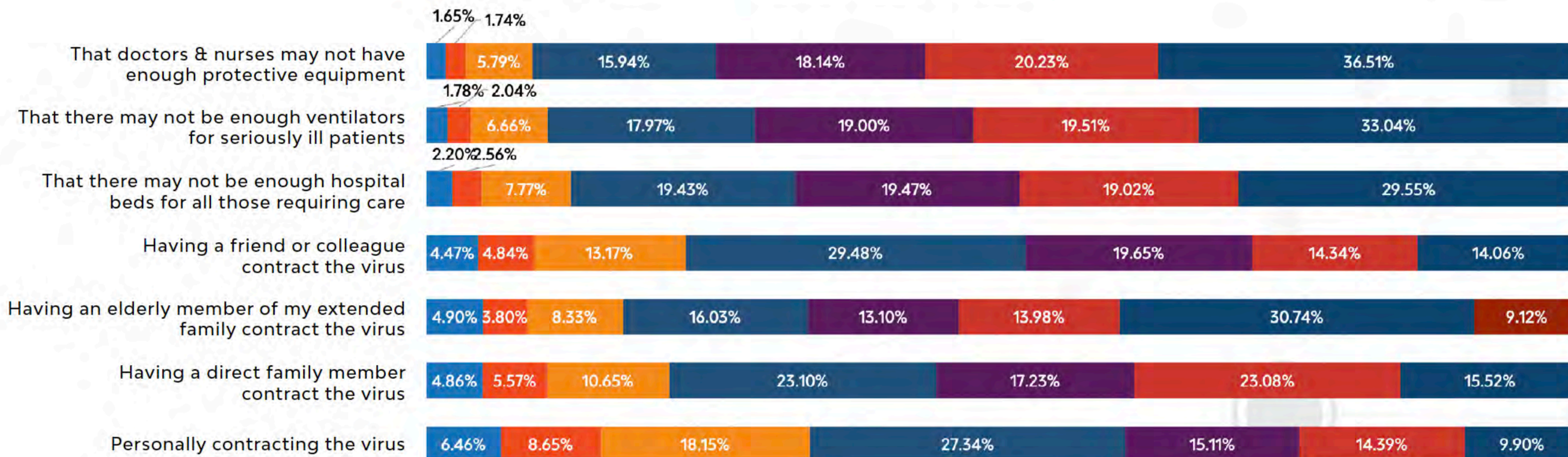


HEALTH

Q12

As a result of the coronavirus situation, to what extent are you concerned about...?

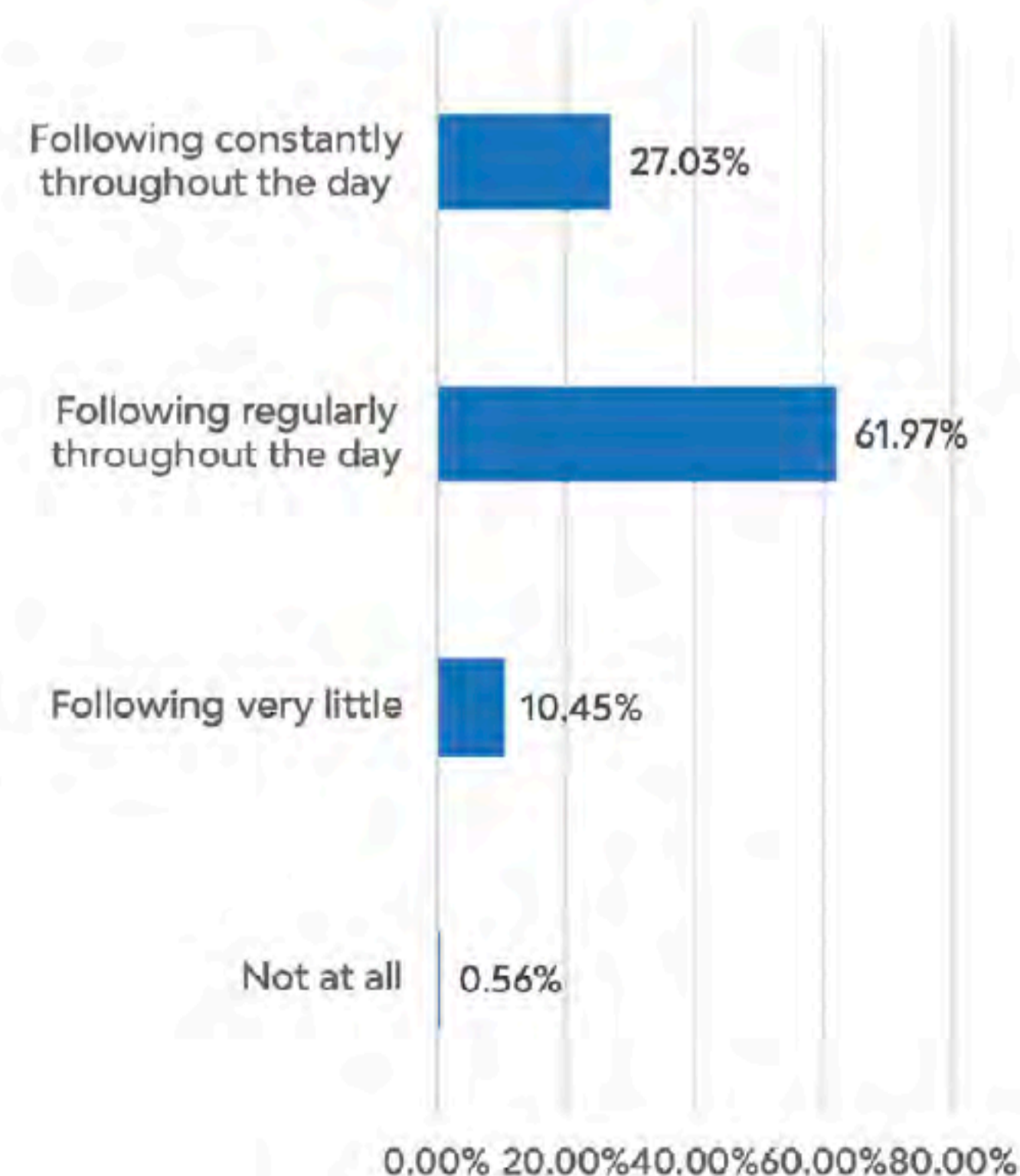
- To an extremely small extent
- To a moderate extent
- To an extremely large extent
- To a very small extent
- To a large extent
- Do not have an elderly family member
- To a small extent
- To a very large extent





Q13

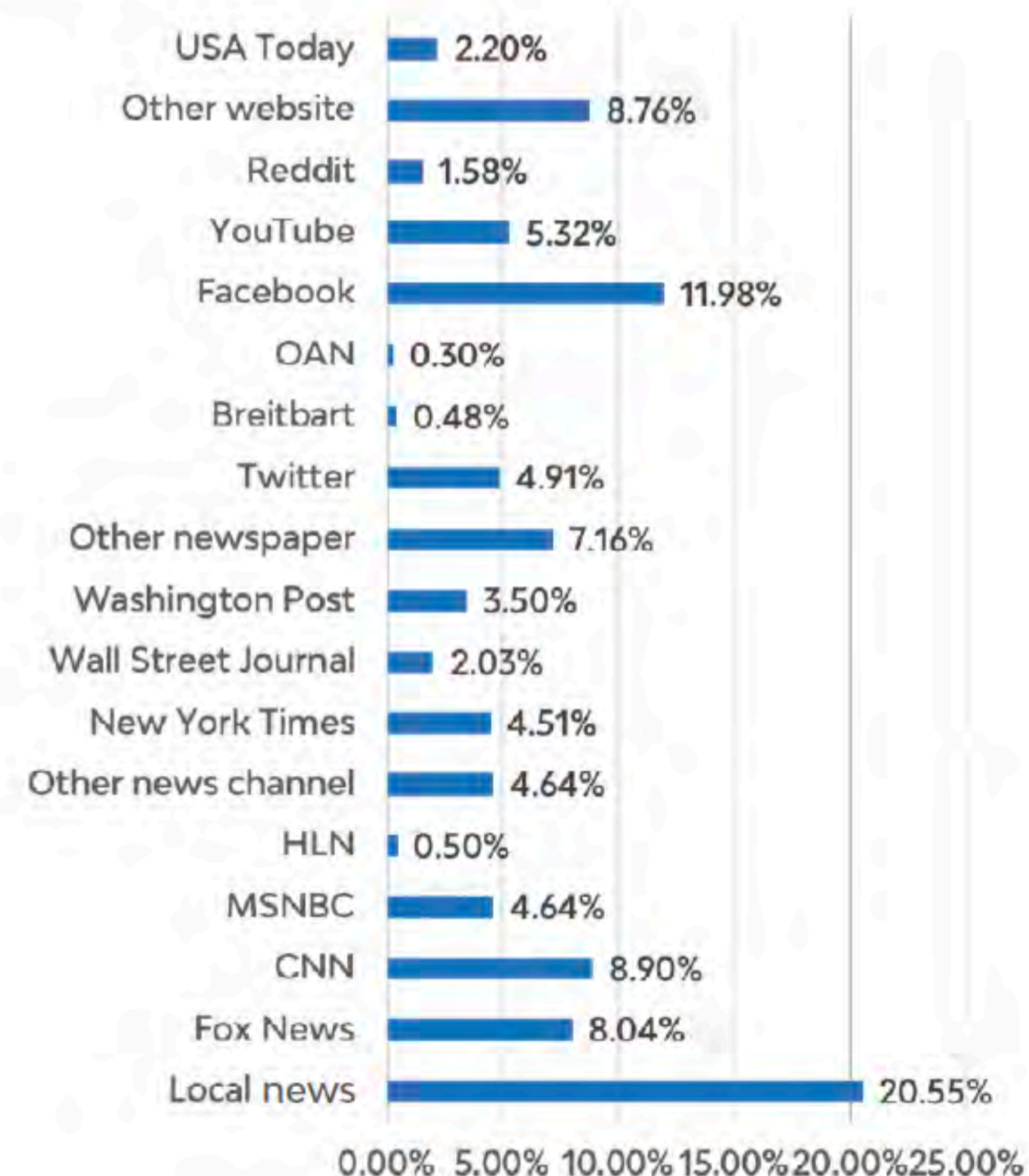
Since you first heard about the coronavirus, how closely have you been following updates and seeking new information about the outbreak?



MEDIA

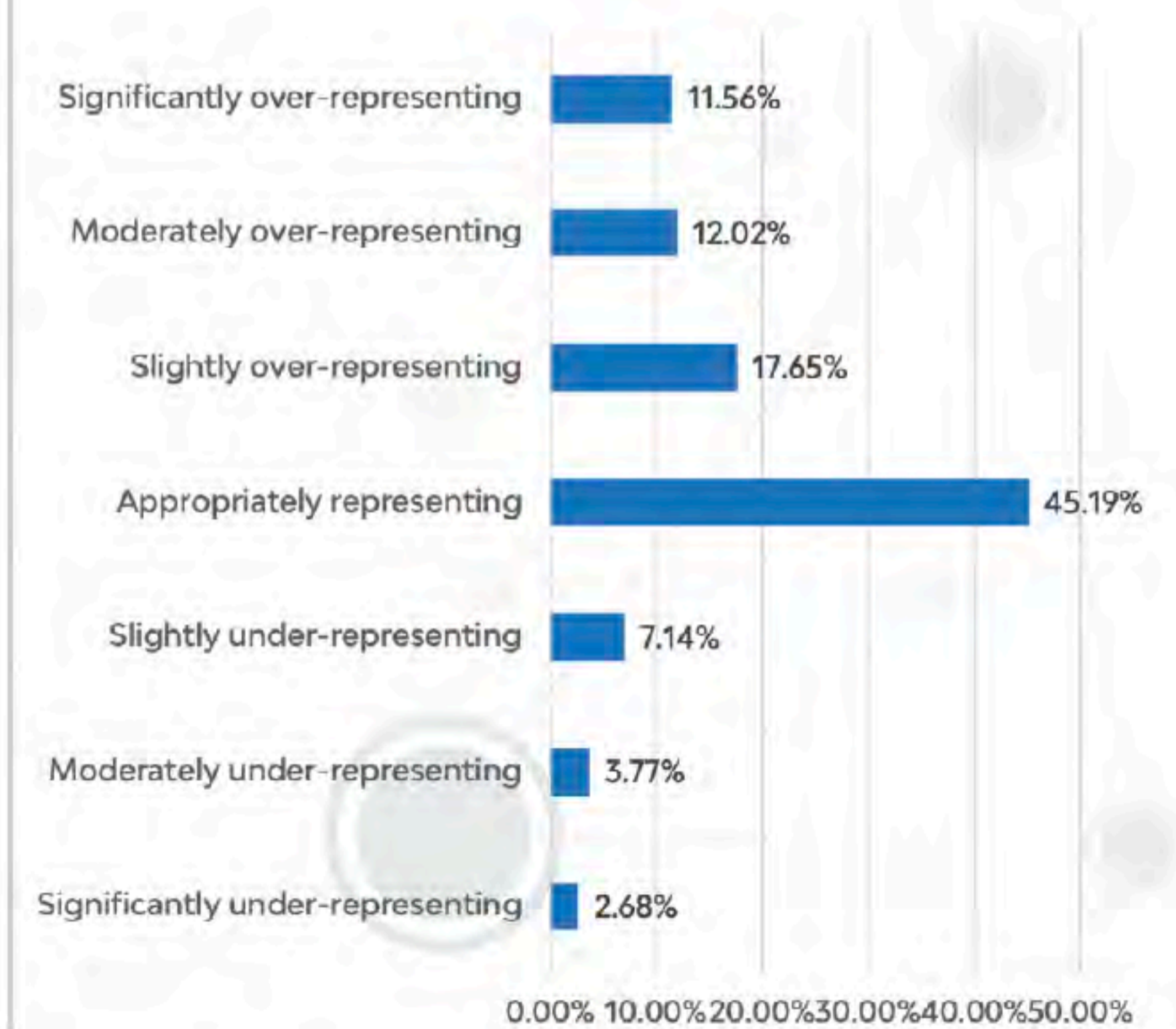
Q14

Thinking about TV, newspaper (print and digital) and websites, from where are you primarily getting your news related to the coronavirus?



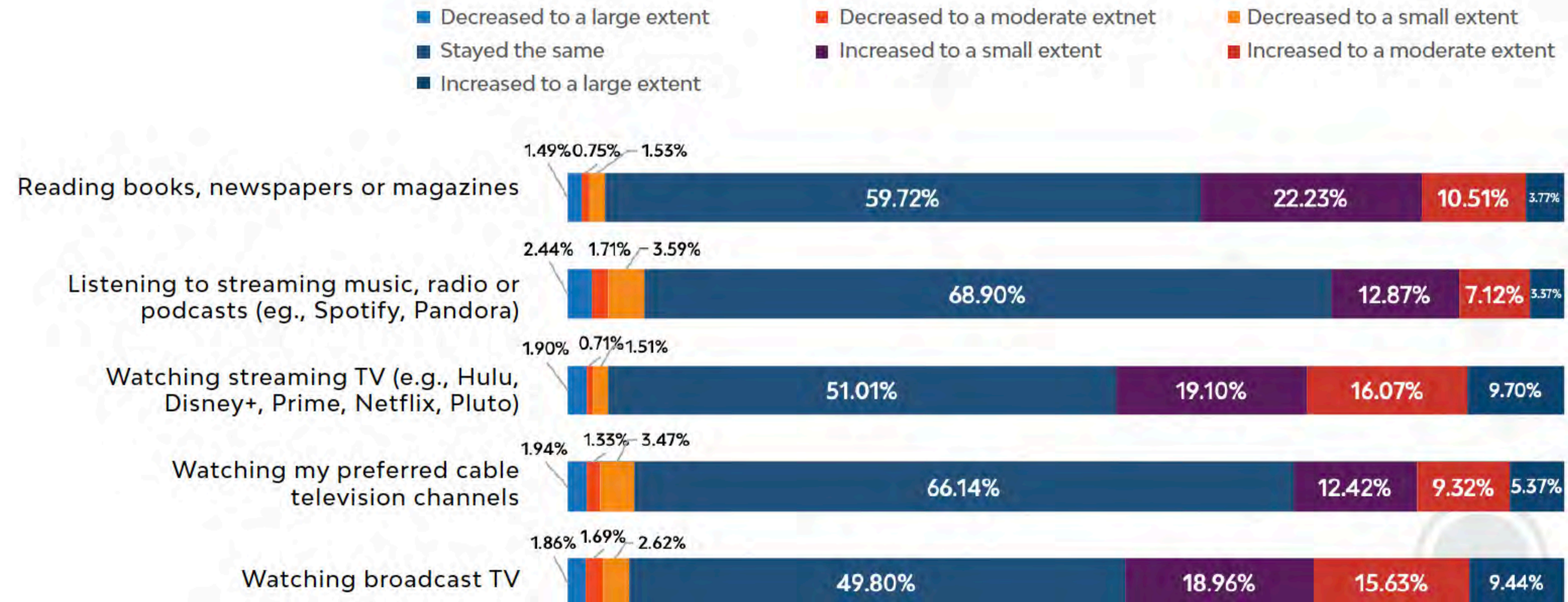
Q15

To what extent is the media coverage over- or under-representing the level of concern associated with the coronavirus?



MEDIA

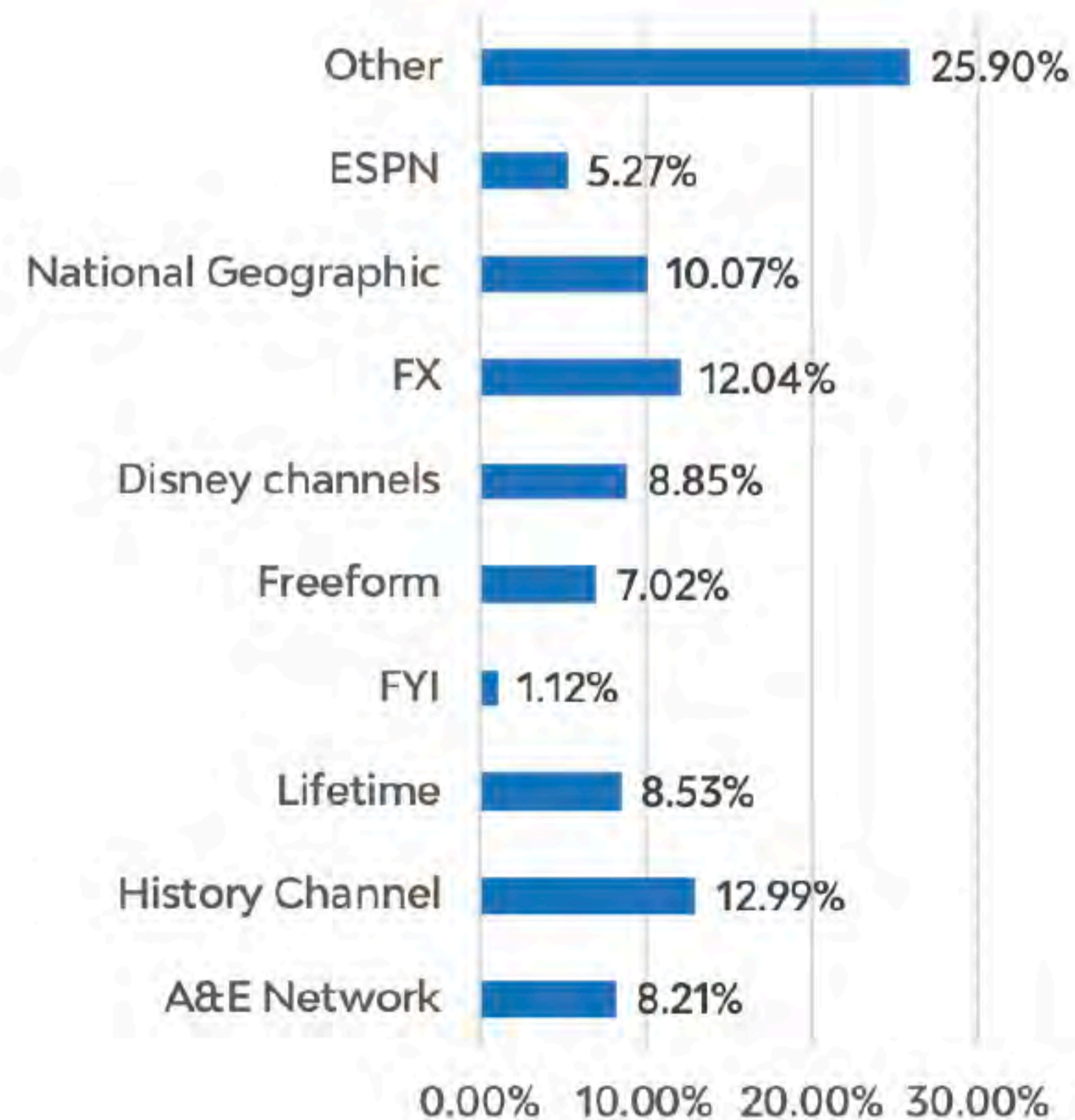
Q16 As a result of the coronavirus situation, how has the frequency with which you do the following changed?



MEDIA

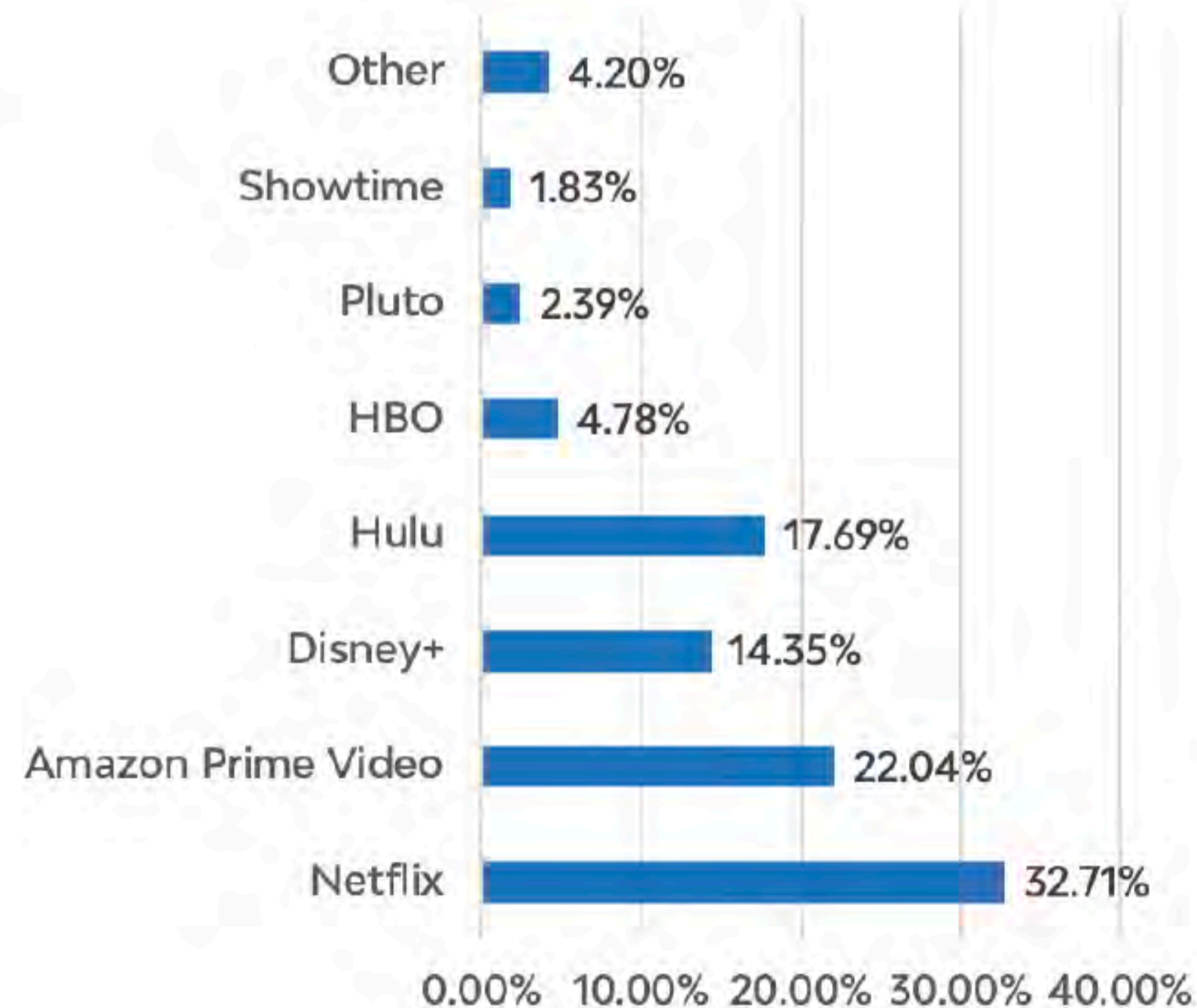
Q17

Which cable TV channels are you now watching more?



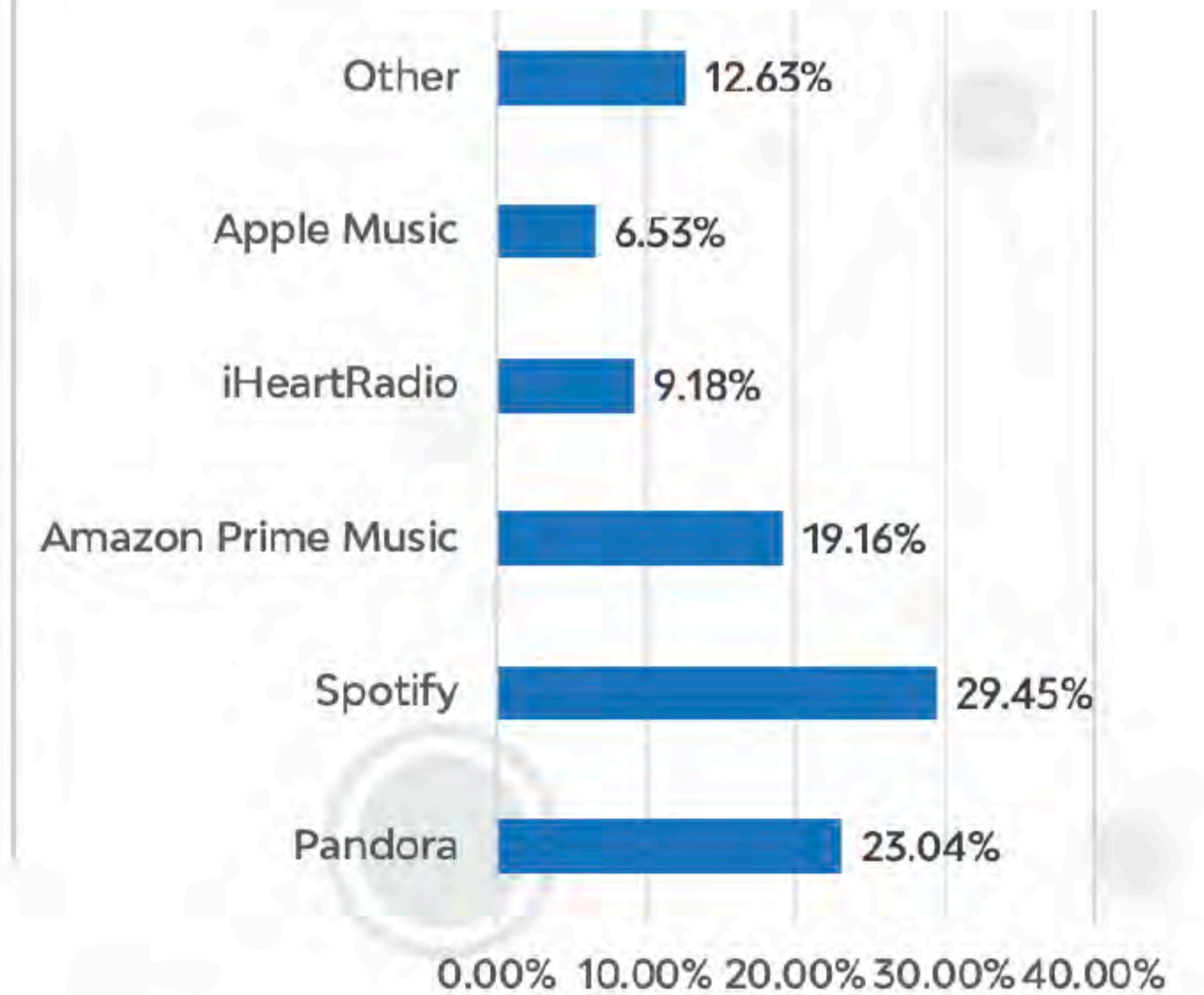
Q18

Which streaming TV services are you now using more?



Q19

Which streaming music/radio services are you now using more?



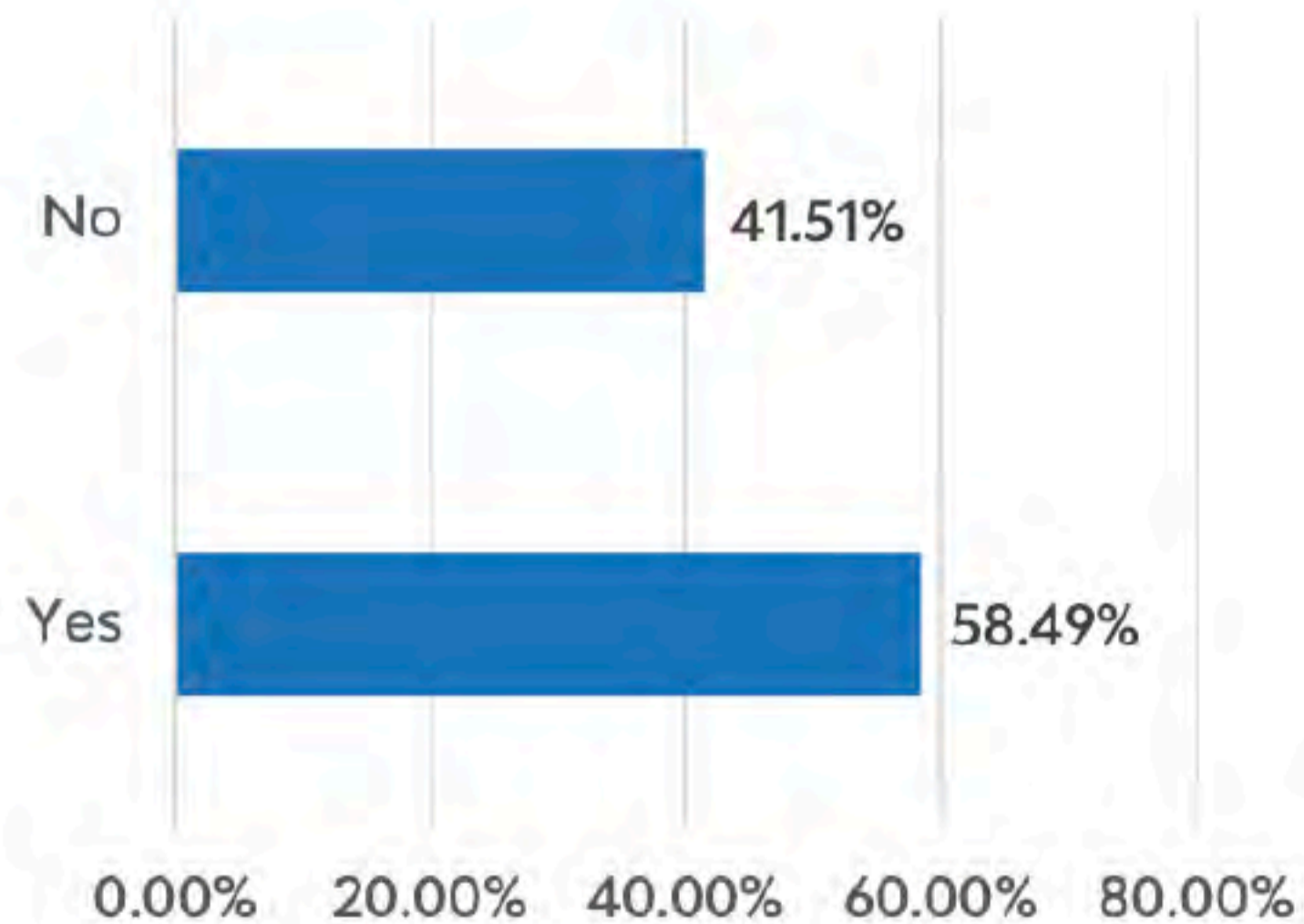


FINANCIAL TAXES



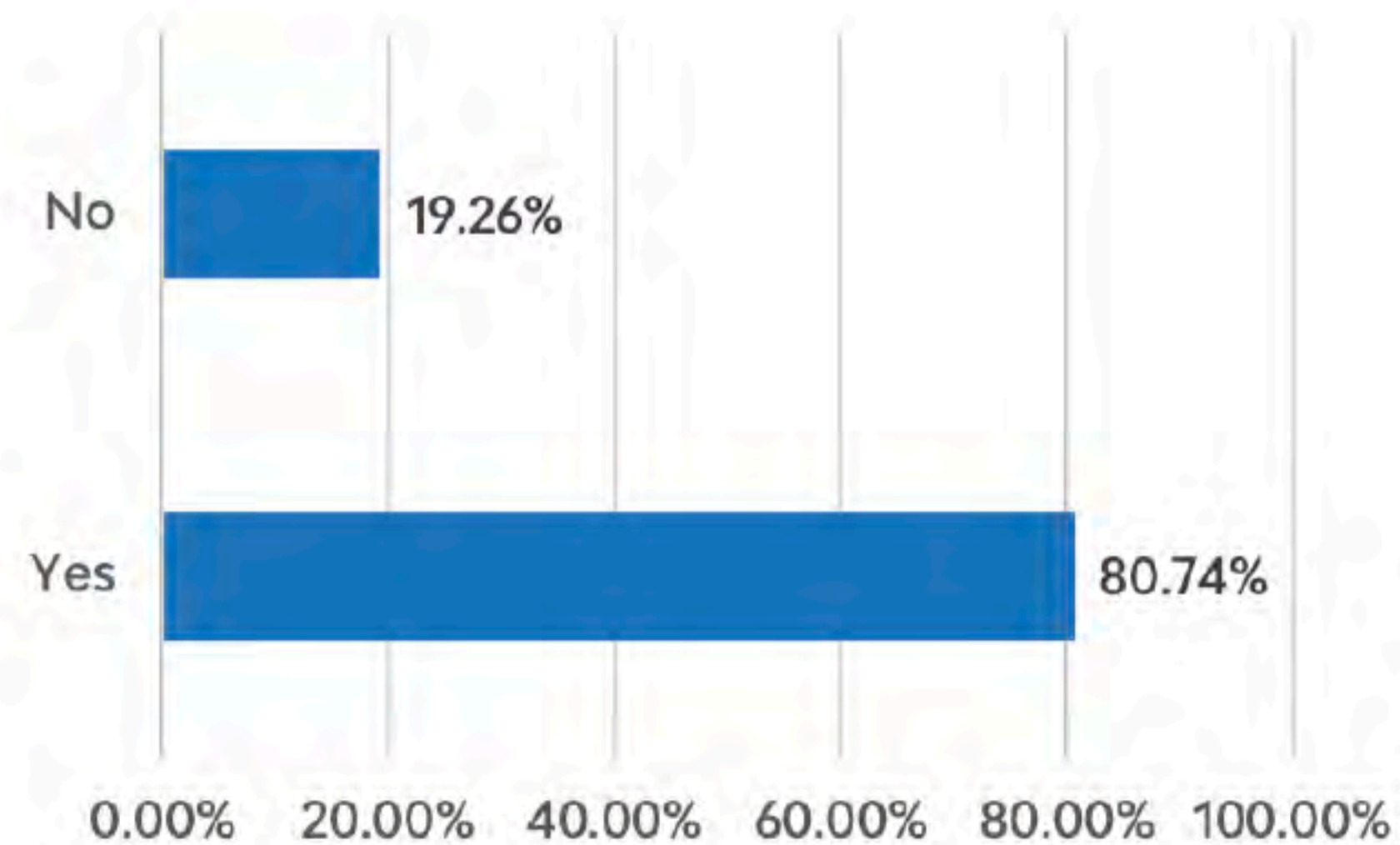
Q20

Have you already filed your 2019 federal and state tax returns this year?



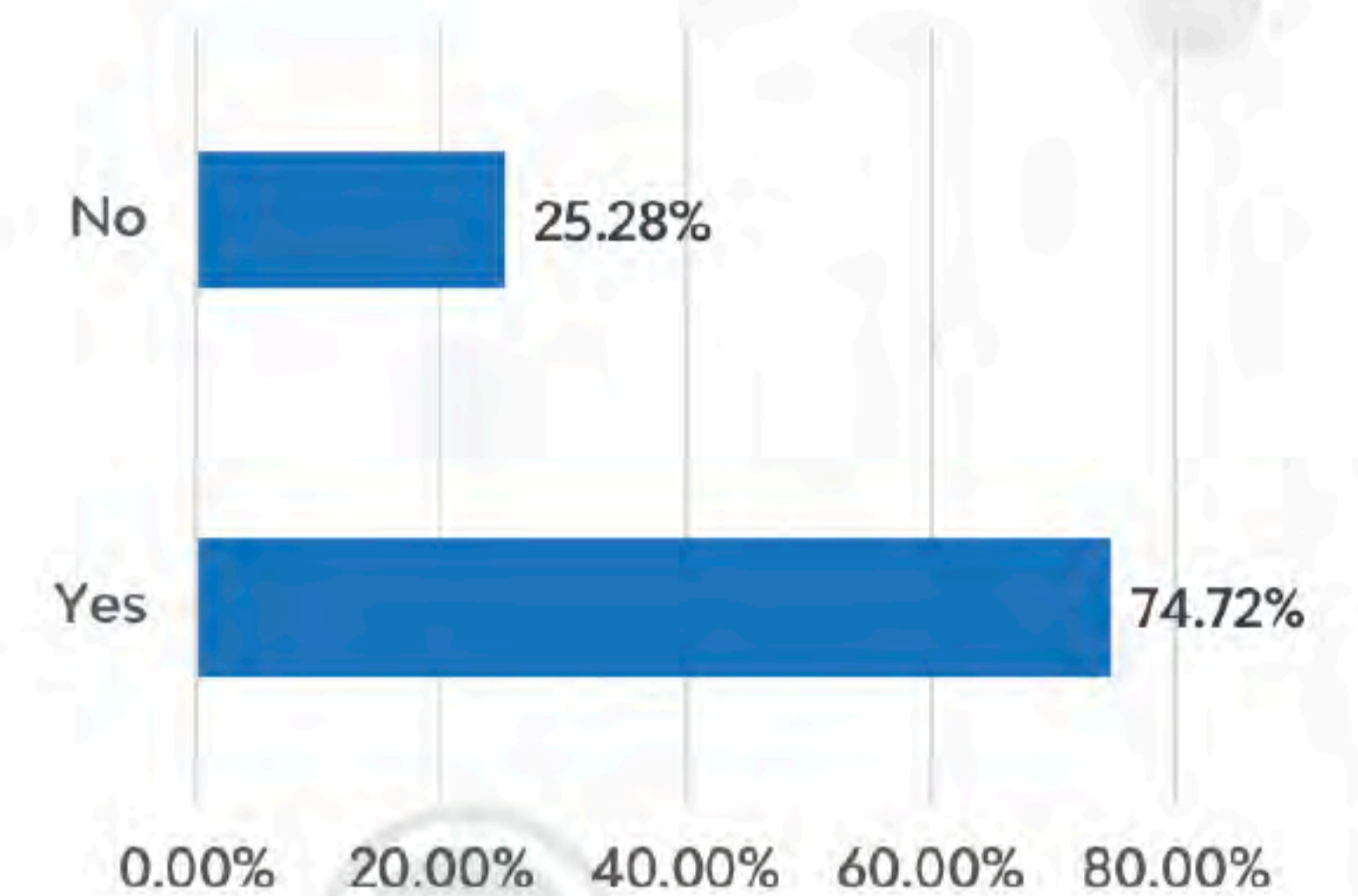
Q21

Are you due a refund, based on your 2019 federal or state tax return?



Q22

Have you already received your federal or state tax refund?





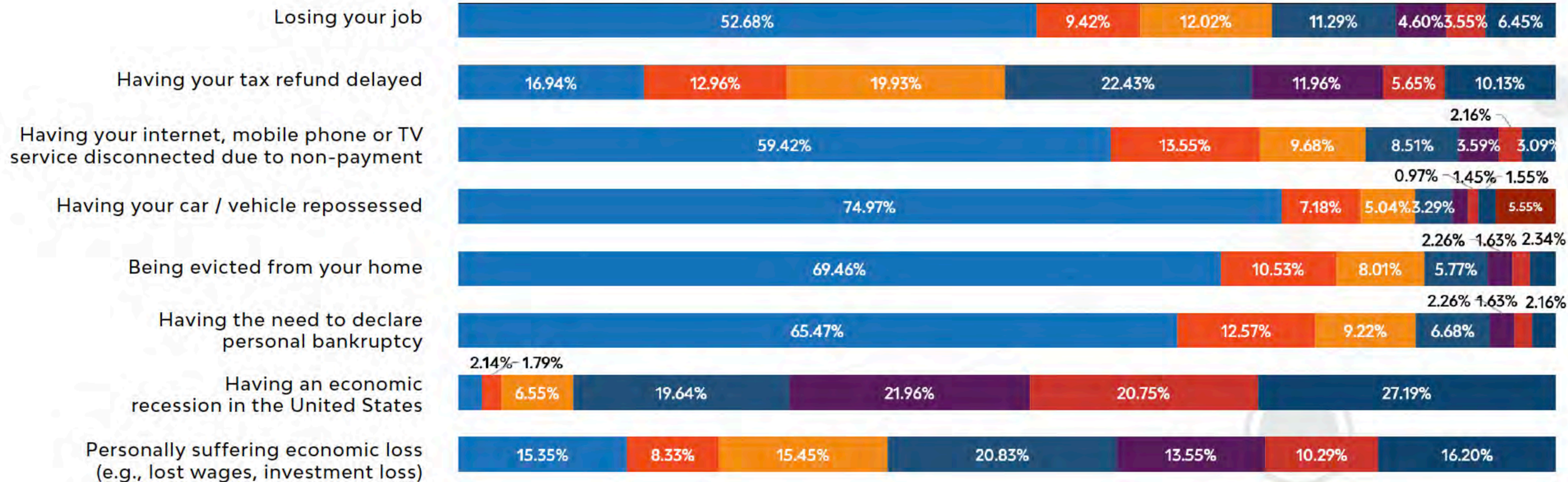
FINANCIAL



Q23

As a result of the coronavirus situation, to what extent are you concerned about?

- To an extremely small extent
- To a moderate extent
- To an extremely large extent
- To a very small extent
- To a large extent
- Do not own a car/vehicle
- To a small extent
- To a very large extent



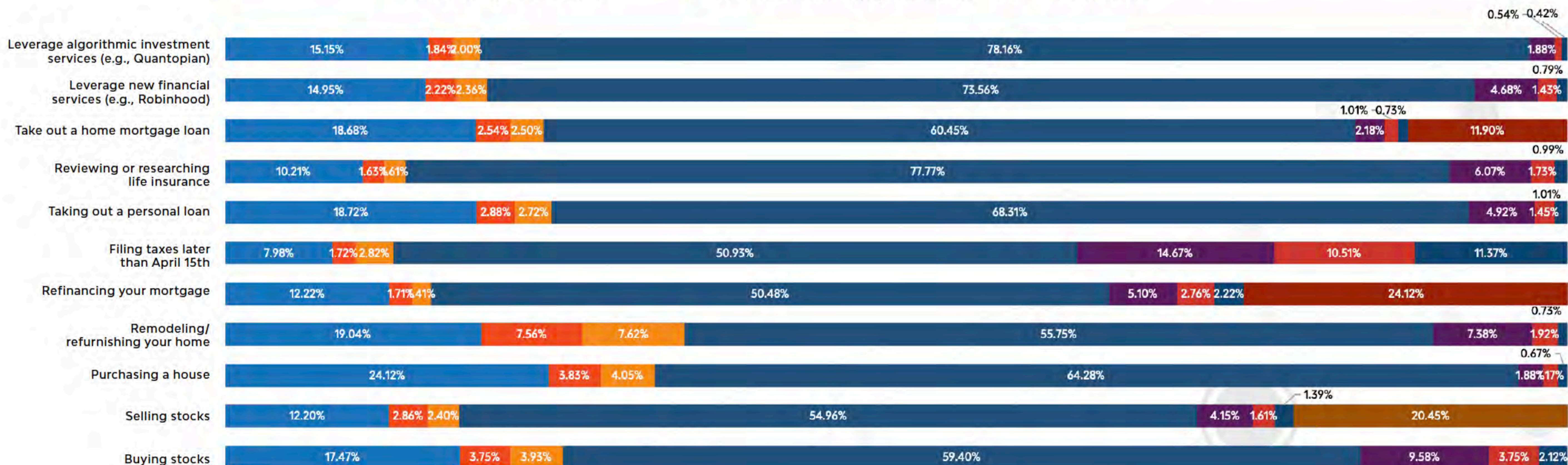


FINANCIAL



Q24 As a result of the coronavirus situation, how will your likelihood of doing the following change?

- Decrease to a large extent
- Decrease to a moderate extent
- Decrease to a small extent
- Remain about the same
- Increase to a small extent
- Increase to a moderate extent
- Increase to a large extent
- Do not have a mortgage/own house
- Do not have stock





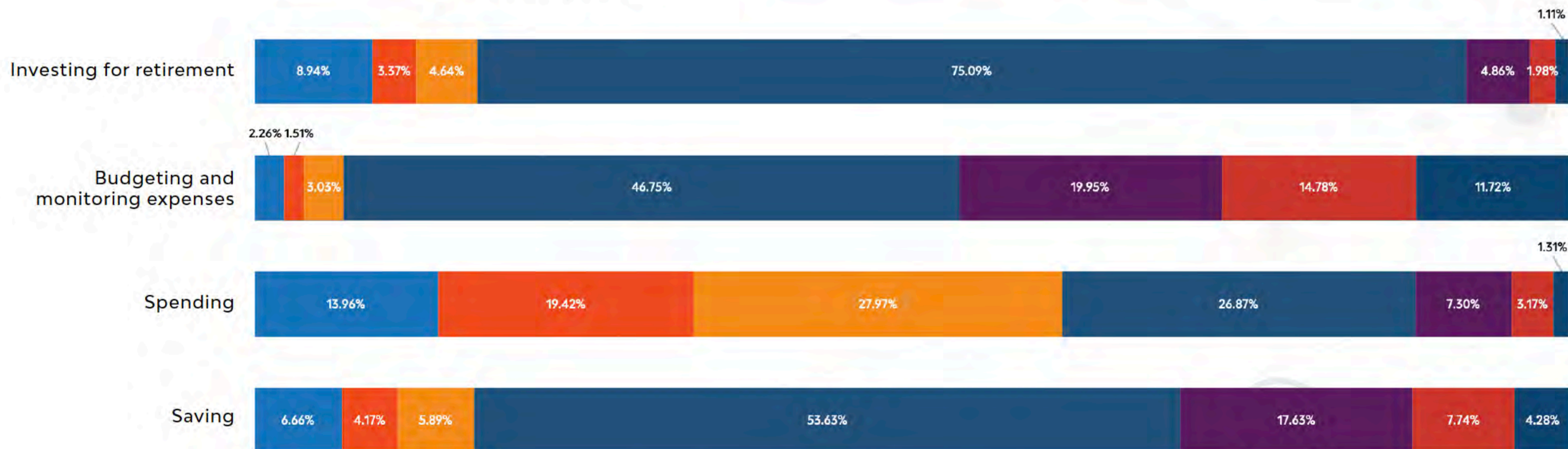
FINANCIAL



Q25

As a result of the coronavirus situation, how have you changed your financial habit of?

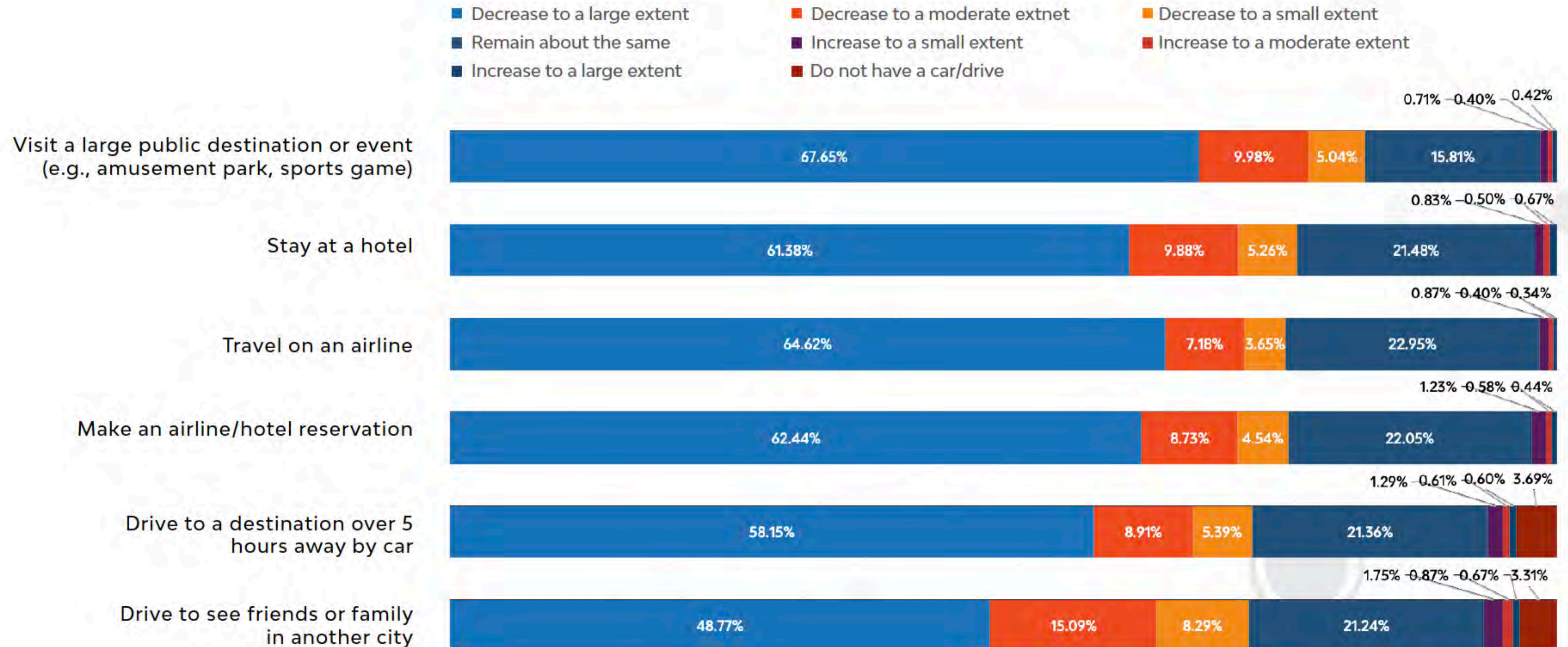
- Decrease to a large extent
- Decrease to a moderate extent
- Decrease to a small extent
- Remain about the same
- Increase to a small extent
- Increase to a moderate extent
- Increase to a large extent



TRAVEL

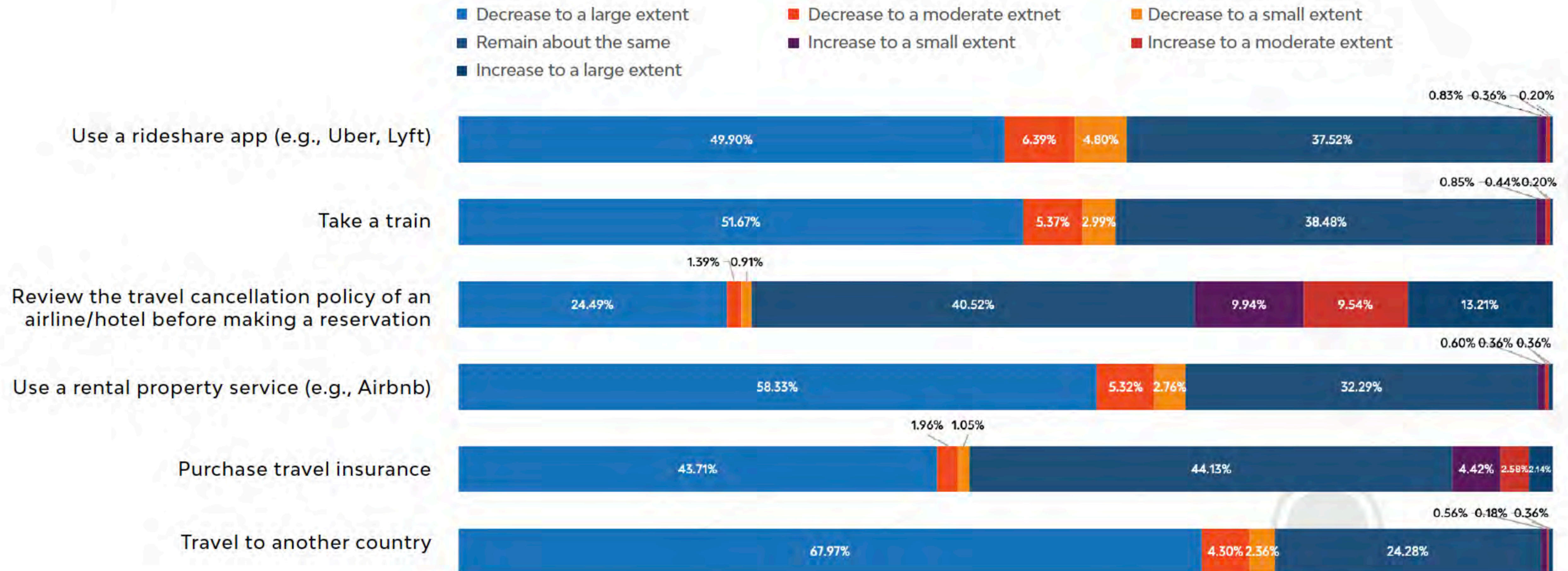
Q26a

As a result of the coronavirus situation, how will the likelihood that you will do the following in the next 90 days change?



TRAVEL

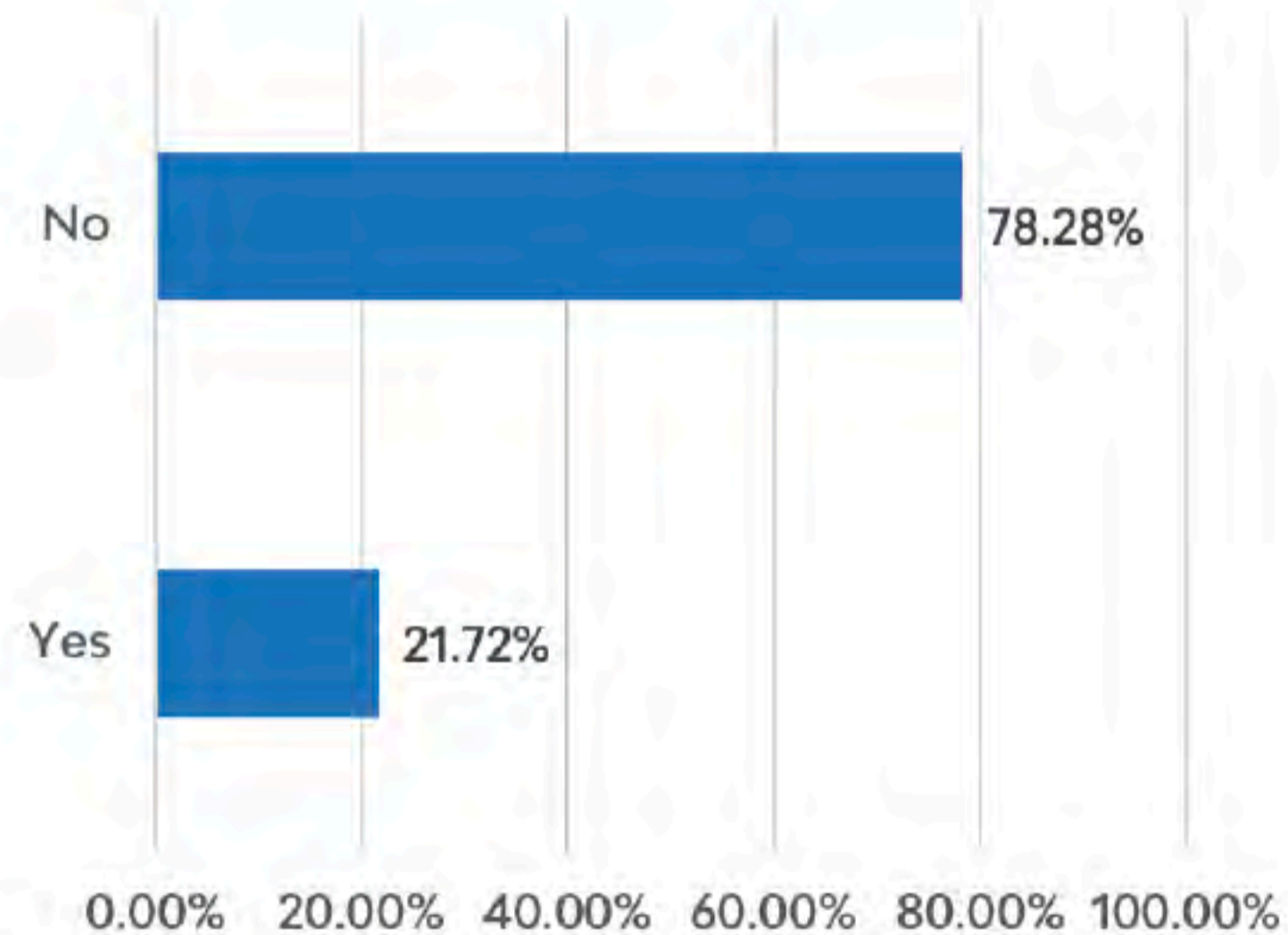
Q26b As a result of the coronavirus situation, how will the likelihood that you will do the following in the next 90 days change?





Q27

As a result of the coronavirus situation, have you initiated the cancellation of an existing airline or hotel reservation?



TRAVEL

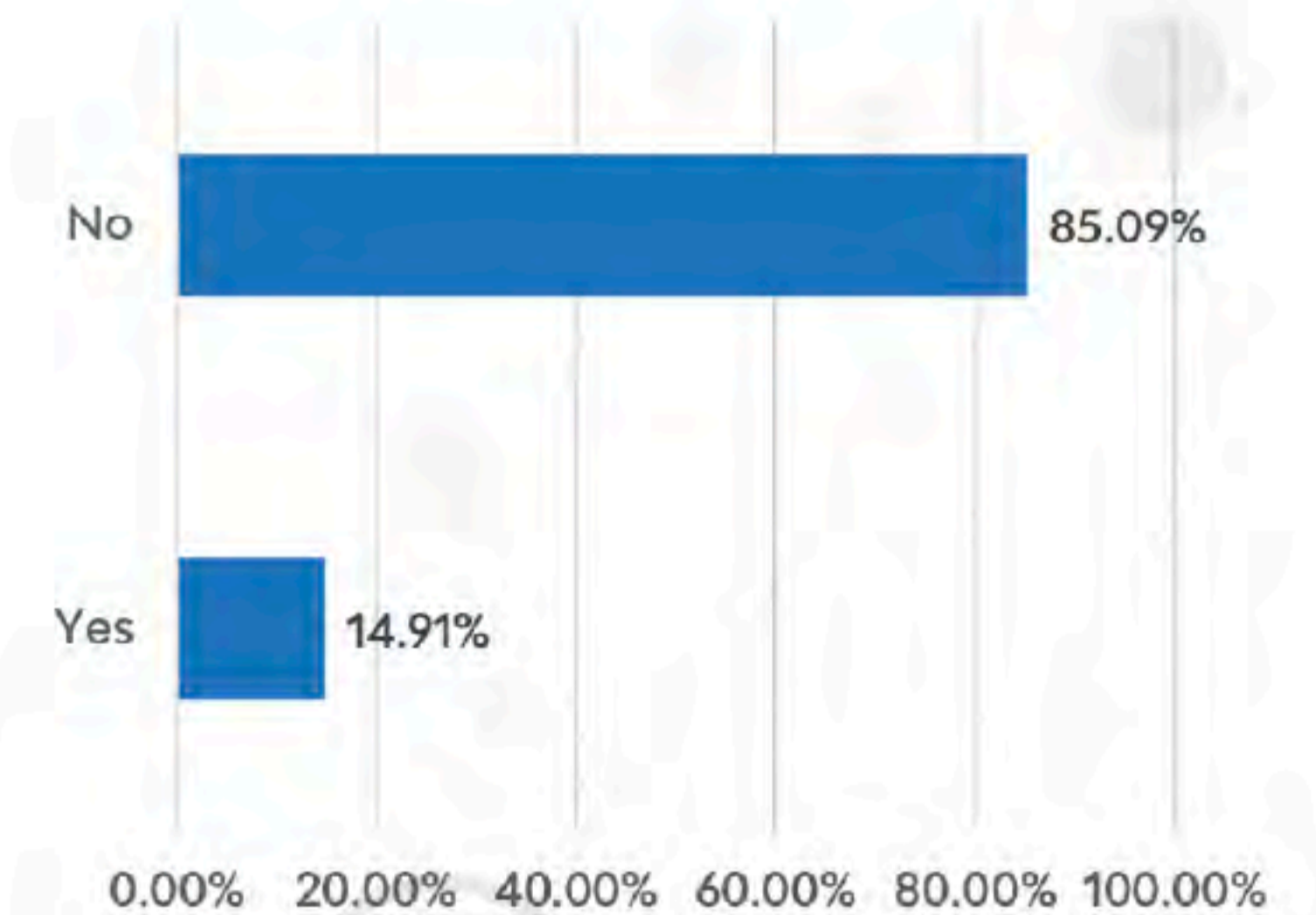
Q28

For those airline or hotel reservation(s) that you cancelled, when were they scheduled to take place?



Q29

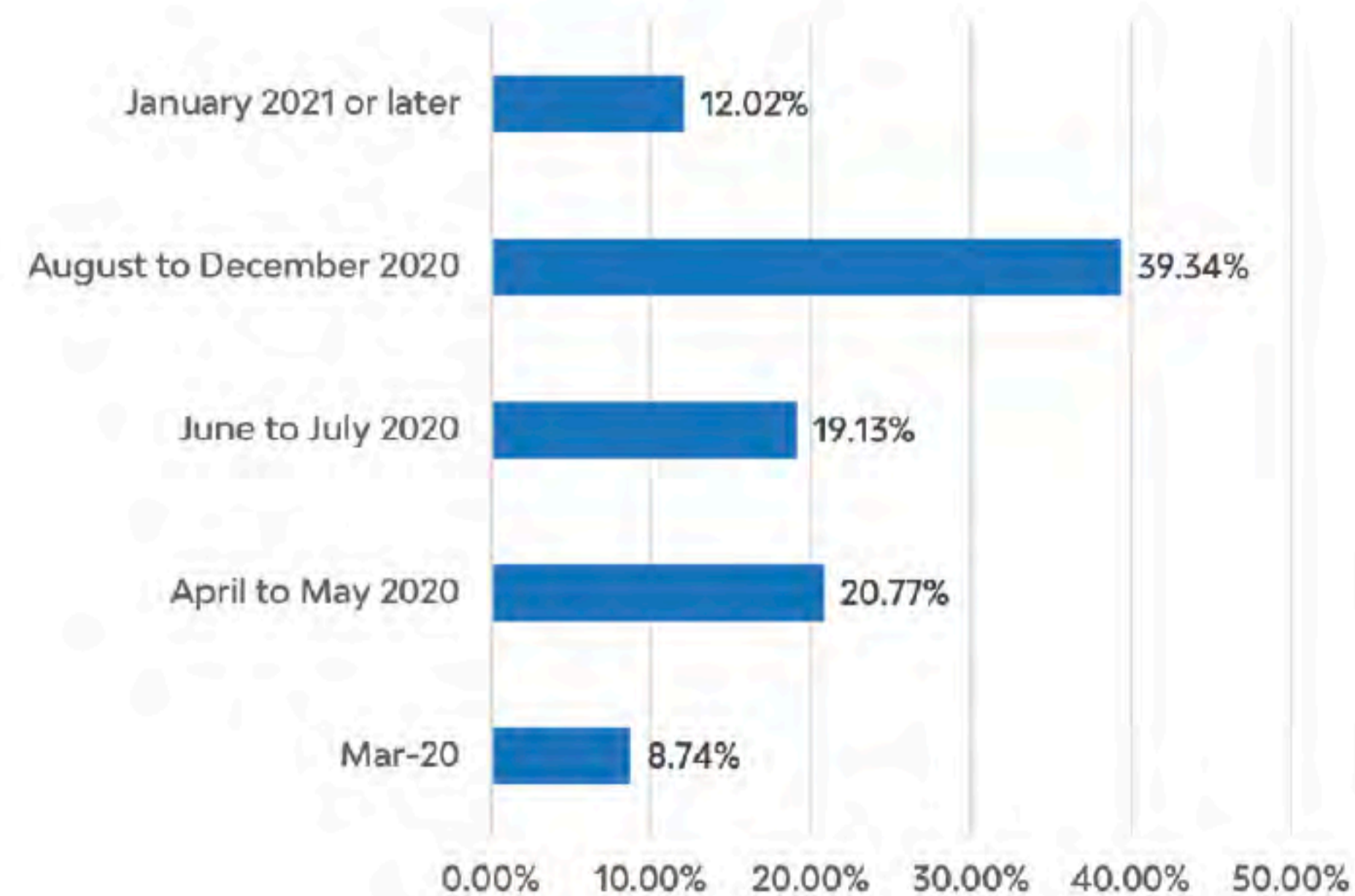
For those airline or hotel reservation(s) that you cancelled, have you booked some or all of them again for a later date?



TRAVEL

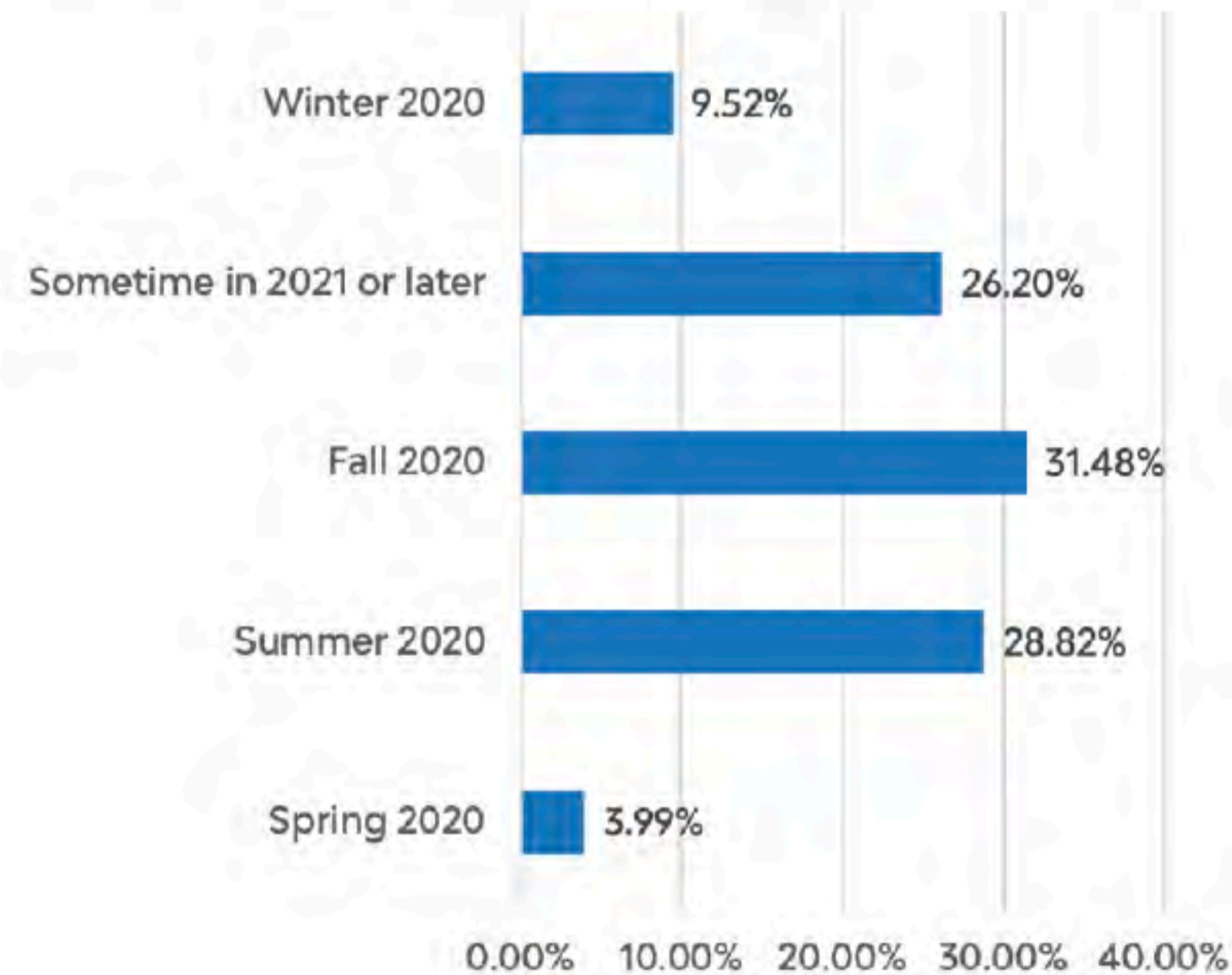
Q30

For when have you rebooked those airline or hotel reservation(s)?



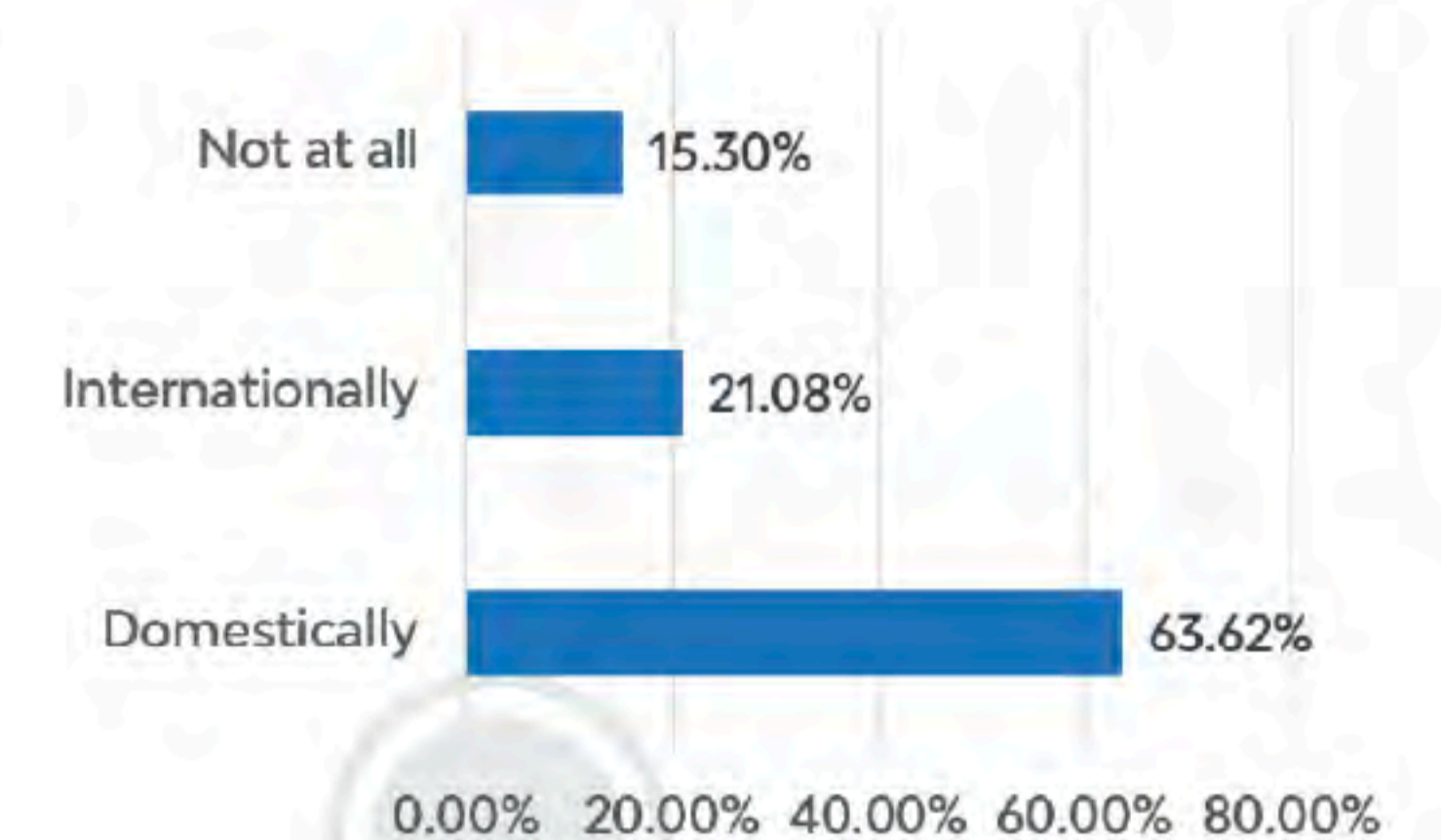
Q31

Thinking about the coronavirus situation, how soon do you expect your travel activities will largely return to "normal"?



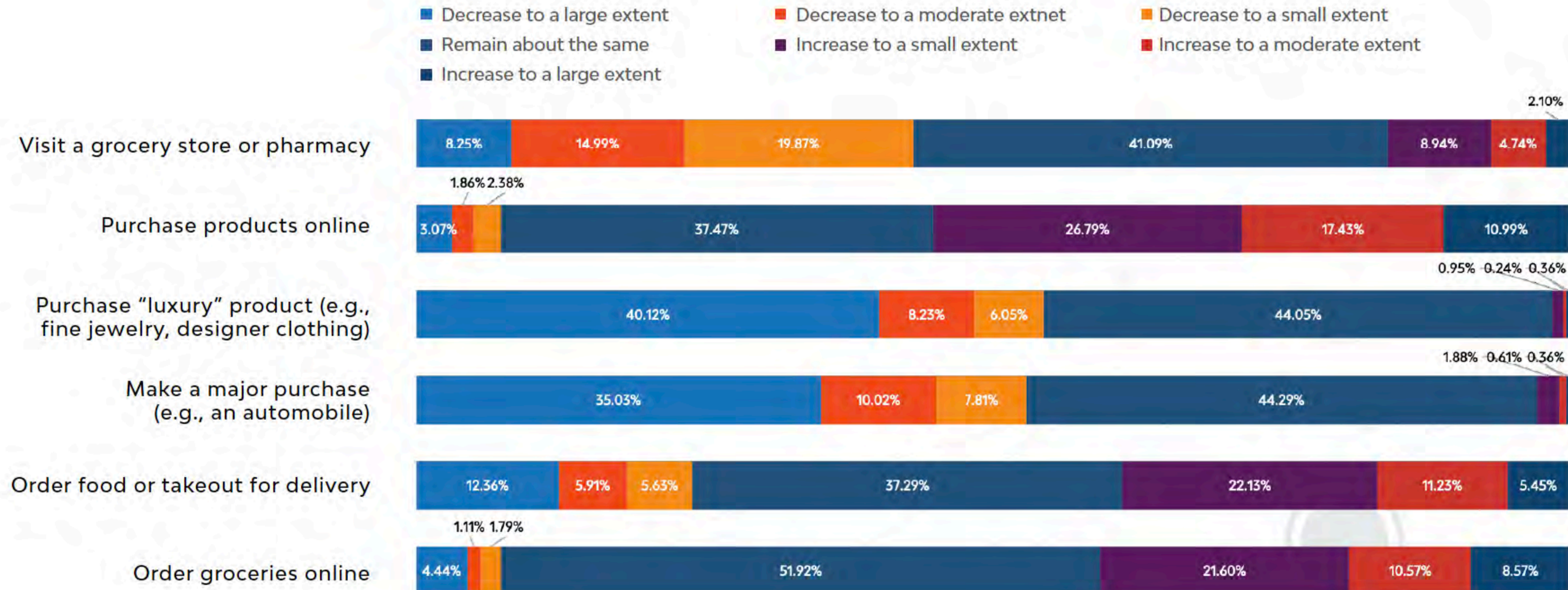
Q32

After the coronavirus is contained and has stopped spreading, will you be willing to travel?



RETAIL

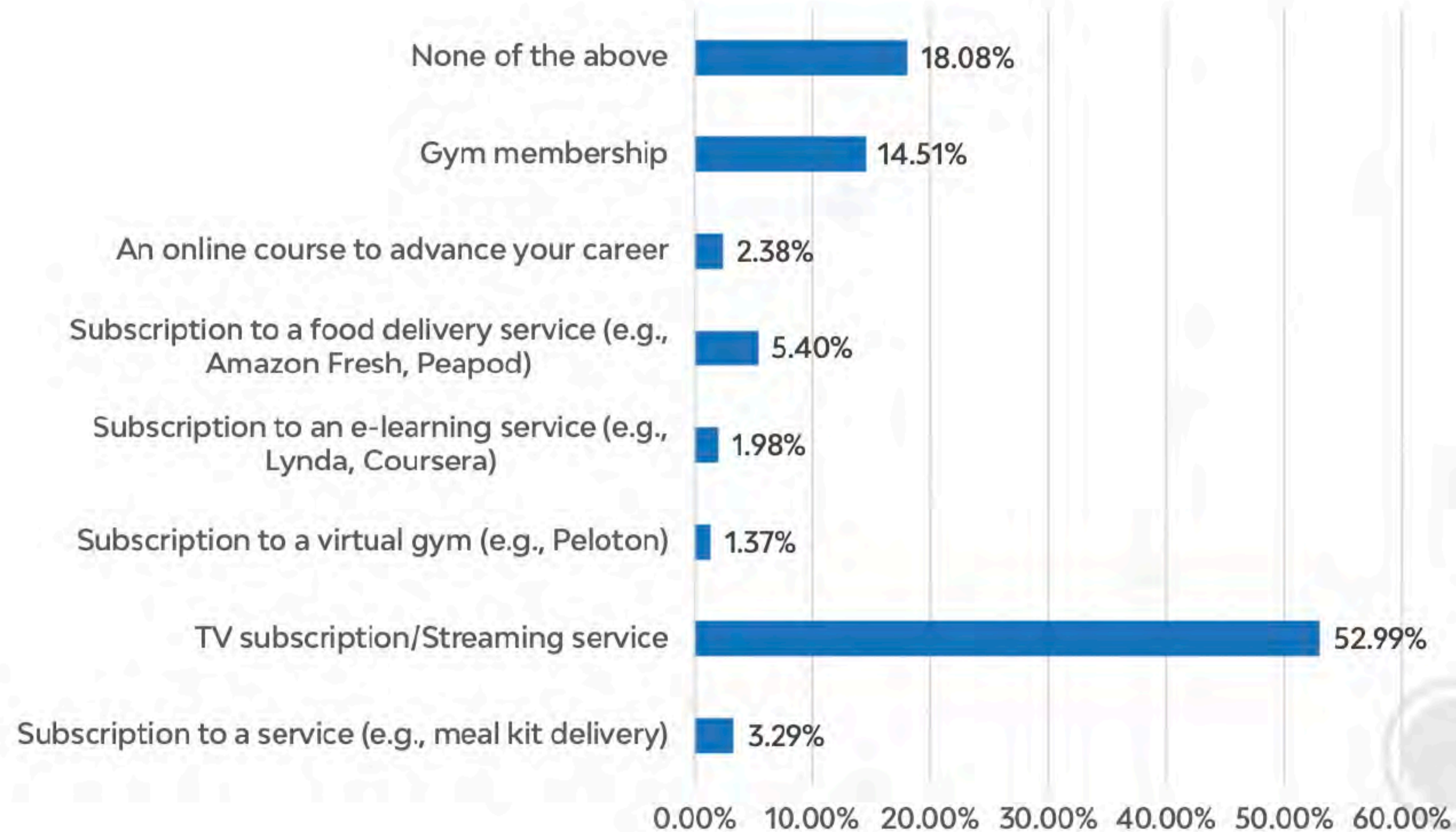
Q33 As a result of the coronavirus situation, how will the likelihood that you will do the following in the next 90 days change?



RETAIL

Q34

Do you have a subscription or membership to any of the following?

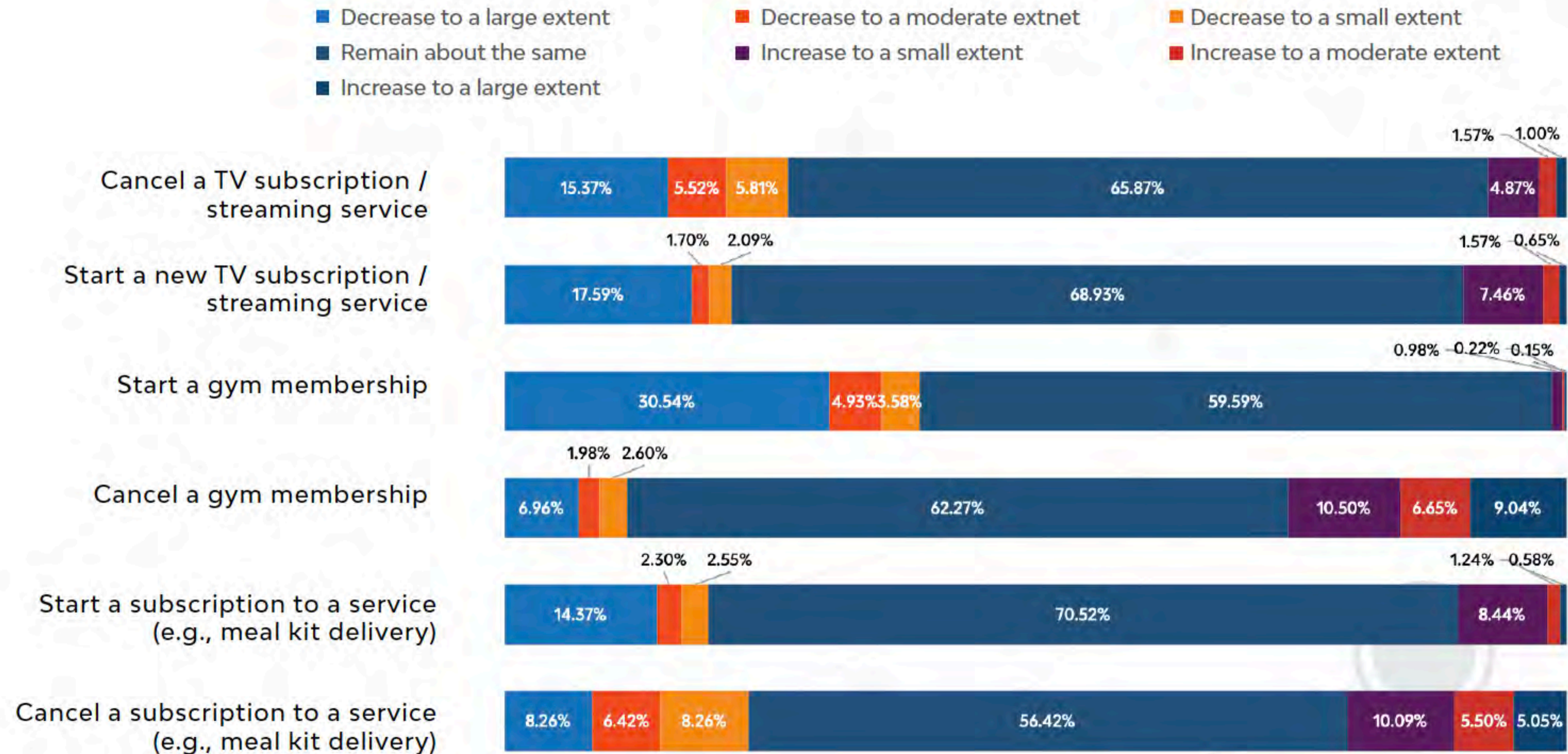




SUBSCRIPTIONS



Q35a As a result of the coronavirus situation, how will the likelihood that you will do the following in the next 90 days change?

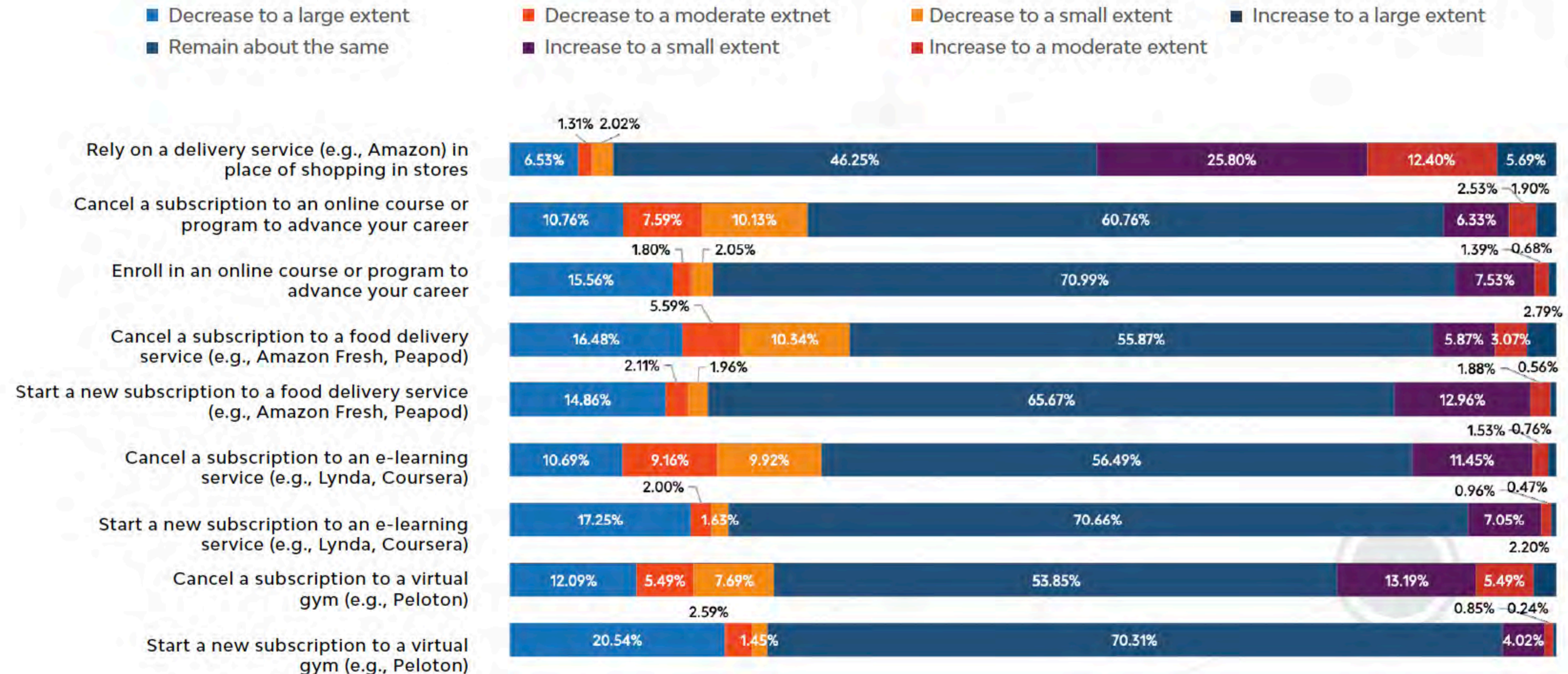




SUBSCRIPTIONS

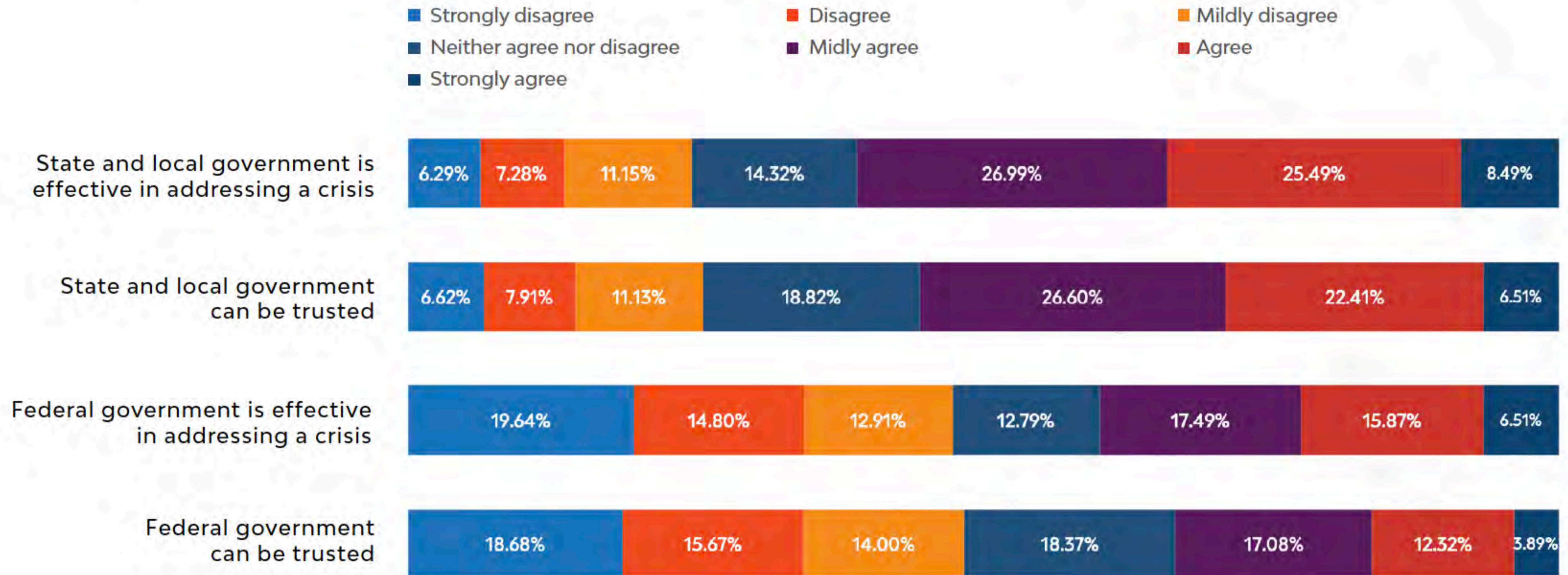


Q35b As a result of the coronavirus situation, how will the likelihood that you will do the following in the next 90 days change?



POLITICS

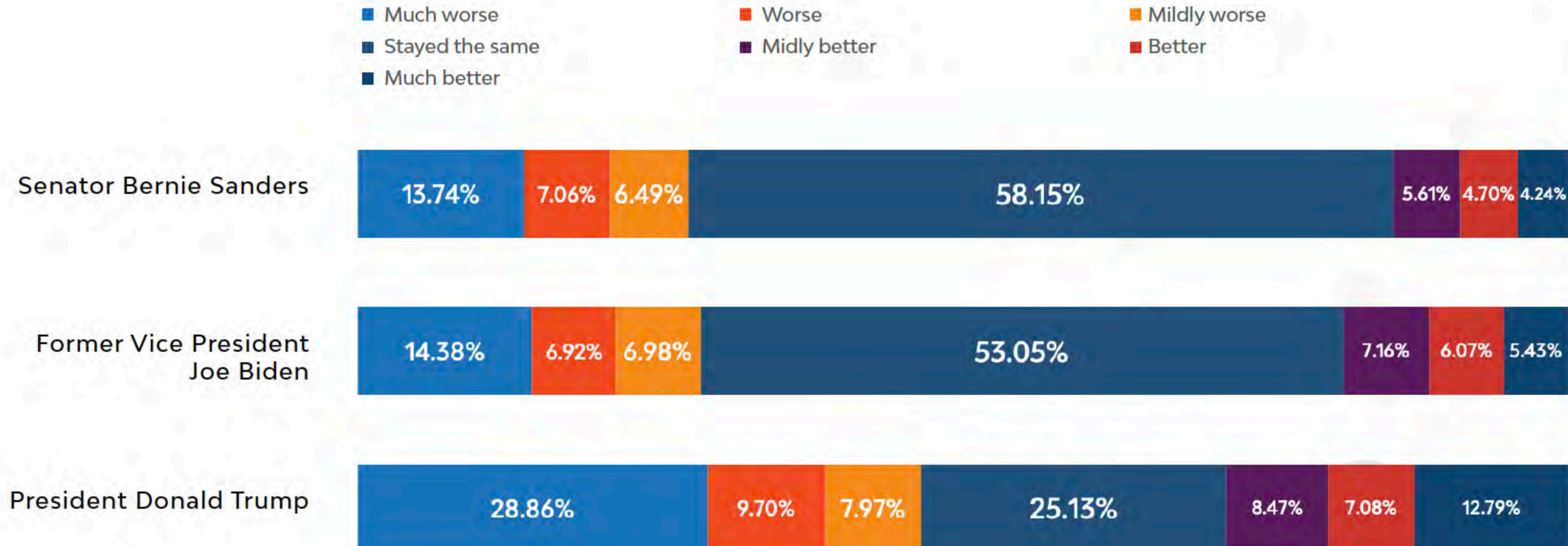
Q36 Thinking about the coronavirus situation, how strongly do you agree or disagree that the...?



POLITICS

Q37

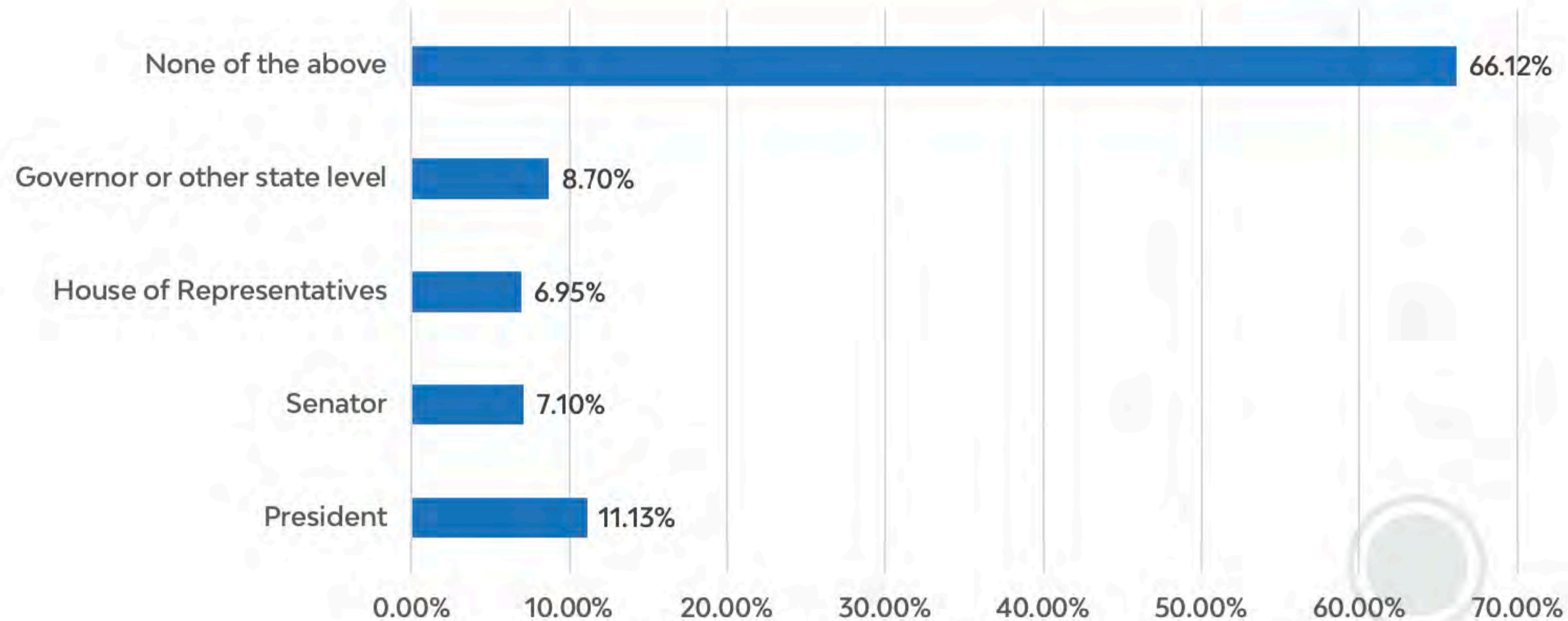
As a result of the coronavirus situation, to what extent has your opinion of the following individuals become better or worse?



POLITICS

Q38

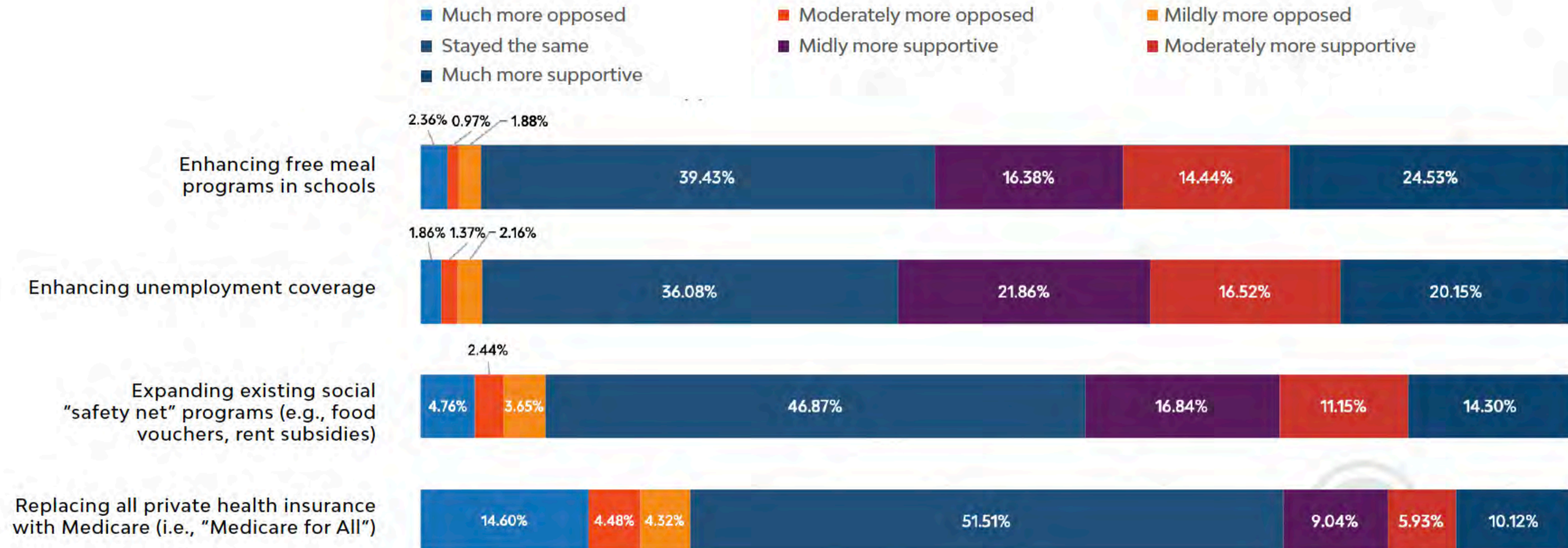
As a result of all you have learned and experienced related to the coronavirus in this country, for which of the following political positions have you changed the person for whom you intend to vote?



POLITICS

Q39

As a result of all you have learned and experienced related to the coronavirus in this country, how has your opinion toward the following public policies changed?



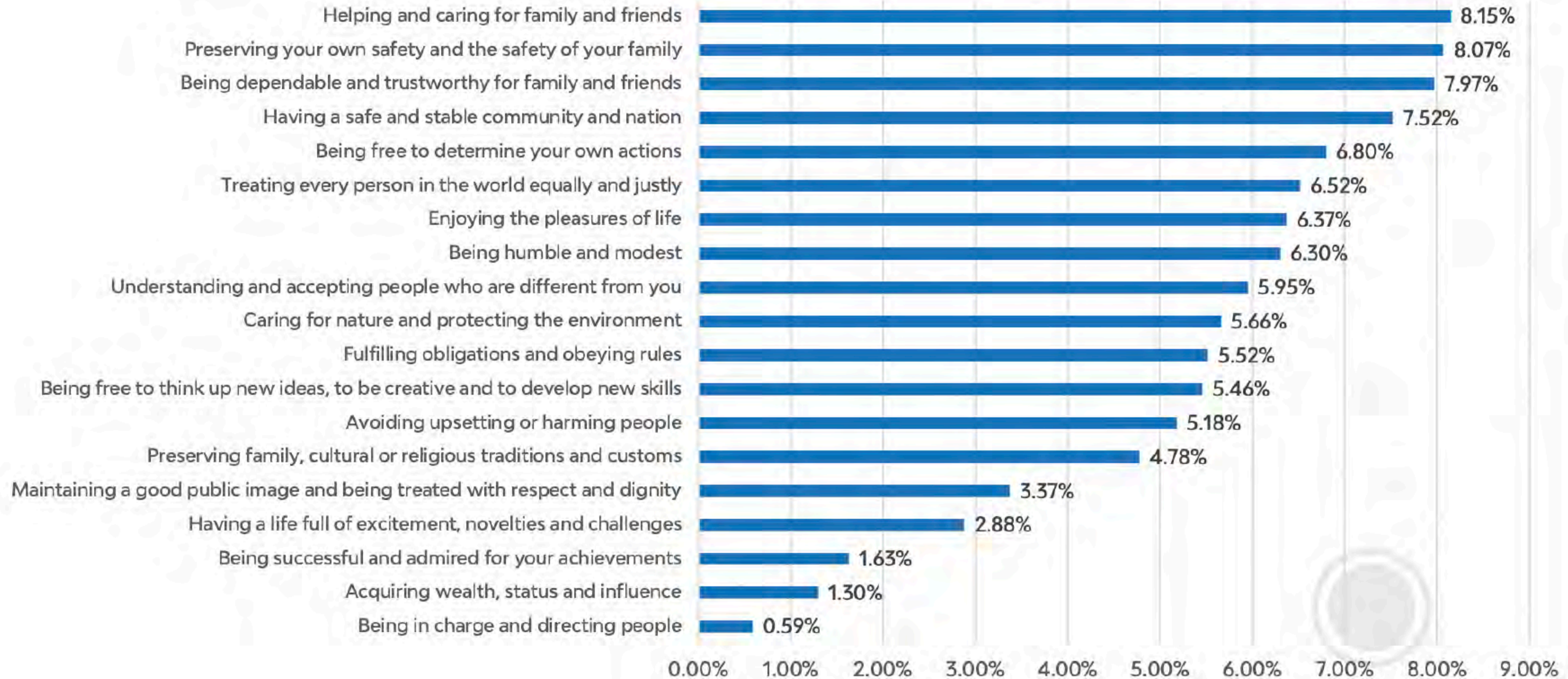


PERSONAL VALUES



Q40

Please consider all of the decisions that you make in your life, which could include personal actions, products you buy, or decisions that you make in your day-to-day life.



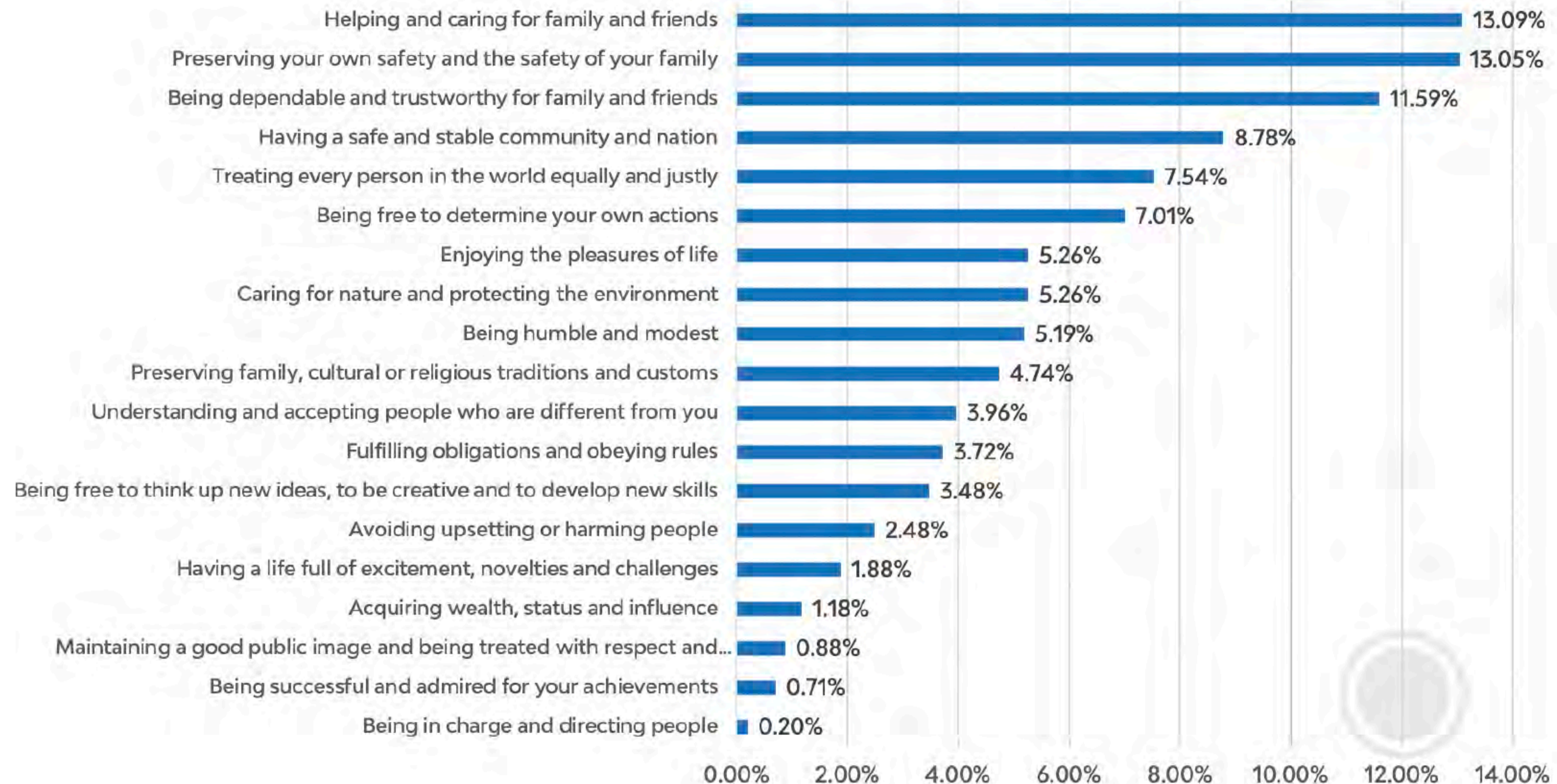


PERSONAL VALUES



Q41

Of the values that you indicated to be important, which influence your decisions the most?





For more information on how you can leverage these timely insights to make a positive impact on your business outlook, please contact us!

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