Coronavirus: US Insights

Mindshare POOL Survey

April 9, 2020

Waves 1 – 5: Ongoing tracker of American consumers

Study Details and Methodology

Goal

To understand the impact of the coronavirus (COVID-19) on American's lives, especially as it relates to media usage, consumer behavior changes, and what Americans expect from brands. Key questions centered on coronavirus outbreak awareness, perception, and behavior changes in media, spend, and content.

This is the ongoing view of the data, with the goal of fielding this as a tracking study to see how the above changes over time. This is a WIP…

Methodology

THE POOL is an online panel fueled by 1.8 million American consumers. Within a few hours, we can conduct original research that drives nimble decision-making through targeted surveys to a client's audiences. THE POOL has many lanes. It can test cultural and content ideas, ad strategy, concepts and performance as well as a consumer's relationship with a brand. It can also uncover insights that tighten the focus of larger segmentation studies.

Data is the powerful core of our business. THE POOL is our resource for getting fast consumer data that creates more effective strategies and tactics.

Survey Details

Online study: 16 questions with demographic data

Fielding dates & number of completes*:

3/11	3/17	3/24	3/30	4/6
1,368	1,326	1,316	1,452	1,201
1st	2nd	3rd	4th	5th

*Nationally representative sample
First wave was in field the day WHO declared COVID-19 a Pandemic, and prior to Trump declaring a State of Emergency

Content Disclaimer

The following is meant to explore trends in changing consumer perception and behavior, designed to help inform potential scenarios and eventualities of the Covid situation.

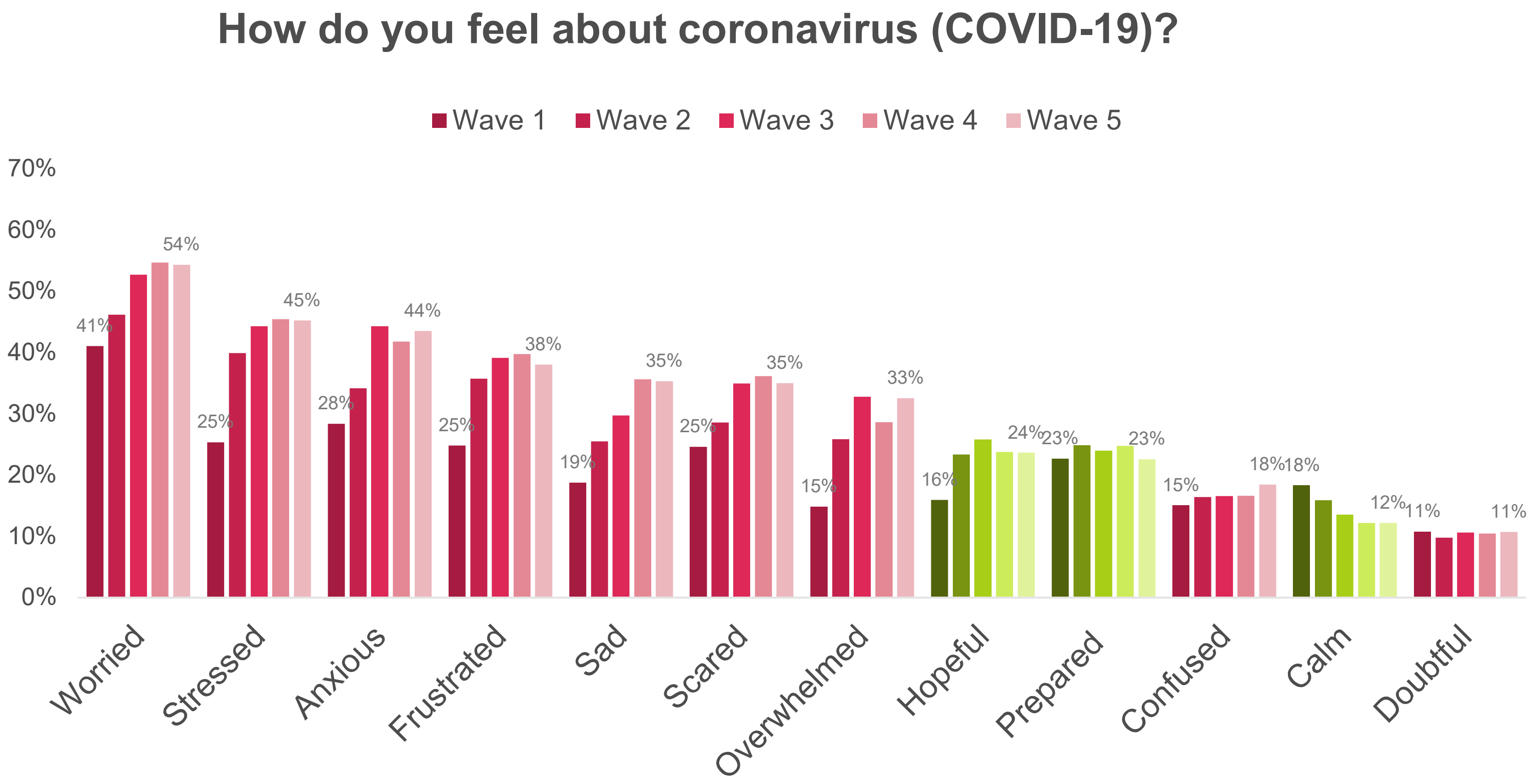
We (Agency) have no expert knowledge (medical or otherwise) of the situation thus the views and findings expressed herein should be regarded as stimulus, not recommendations, based on changing survey findings.

We will continue to work with clients to monitor the situation.

Key Insights

- Sentiment continues to be down this week, with more Americans feeling overwhelmed with the impact and confused over conflicting guidance being given. Five weeks in, people are increasingly worried about the uncertain future that awaits them, not only from a health perspective, but from an economic perspective as well.
- Americans are embracing the idea of community and togetherness. Majority report that it's a community effort to stop the spread of COVID-19. However, many cannot take necessary precautions as a result of economic and social inequality. Middle-class & Affluent Americans report working from home, self-quarantining, and connecting with each other virtually, while low income Americans are most likely to report doing none of the activities as it relates to home/leisure nor are they taking as much direct action.
- Americans are continuing to purchase basic needs, including fresh food. Self care, beauty, and home supplies are top non-essential items purchased. Affluent Americans are most likely to spend during COVID-19, more likely to act on sales of big ticket items (e.g. home appliances).
- Americans are asking brands for more info and content from product availability to virtual experiences. There's a continued fatigue with COVID-related news, so Americans, especially those under 40, want to see in humorous content from brands and are turning to streaming video and social sites for entertainment.

Americans feel slightly more overwhelmed & confused in the past week – not only by the conflicting information, but also living in a state of unknown



“Well we get **told so many different things** different days and I get overwhelmed about all of this.”

“I am feeling anxious because there are **so many unknowns right now**. I feel overwhelmed because I feel like I am not doing as much as I could or should be doing. I feel grateful because I have enough food to eat and don't have to worry that I will be evicted or without resources.”

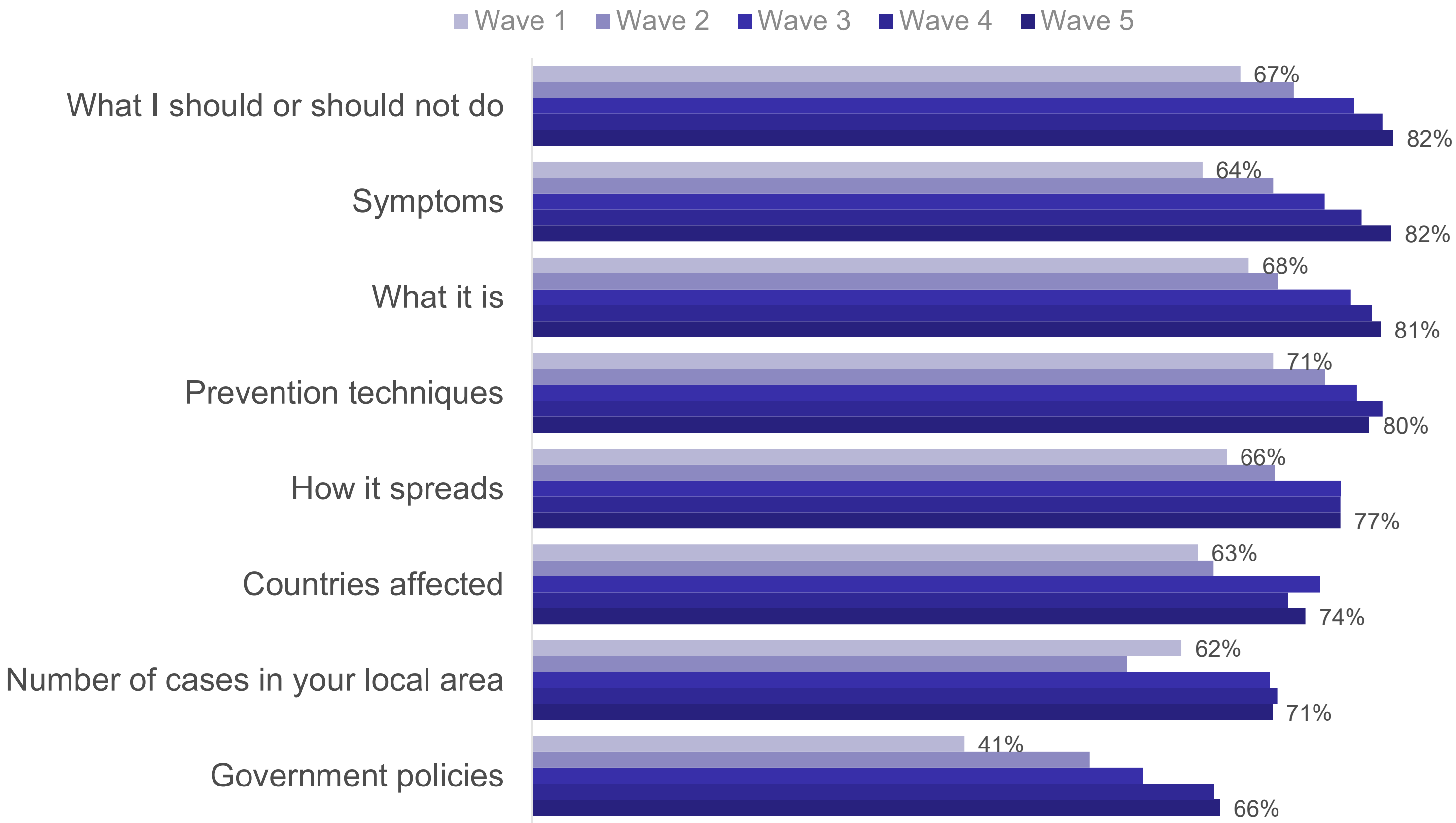
“Grateful to **still have a paying job**, but overwhelmed with what the world currently looks like.”

- Boomers are the most hopeful, Gen X the least
- Women feel more negative than men, who overindex for feeling calm
- Middle class (HHI $30K-$100K) are slightly more hopeful than the others
- South are less likely to feel negative than the other areas

Source: Mindshare Pool Study

At this point, majority of Americans are well informed of the current situation & related government policies

Informed/Very informed of the following related to coronavirus



- Boomers are the most informed, while Gen X are the least
- Women are overall more informed than men
- Middle class (HHI $30K-$100K) & Affluent (HHI $100K+) are more informed than lower income (HHI Less than $30K)
- Those in the Midwest are most informed about the number of locals cases

(Reminder: Wave 1 was in field prior to Trump's televised address)

Source: Mindshare Pool Study

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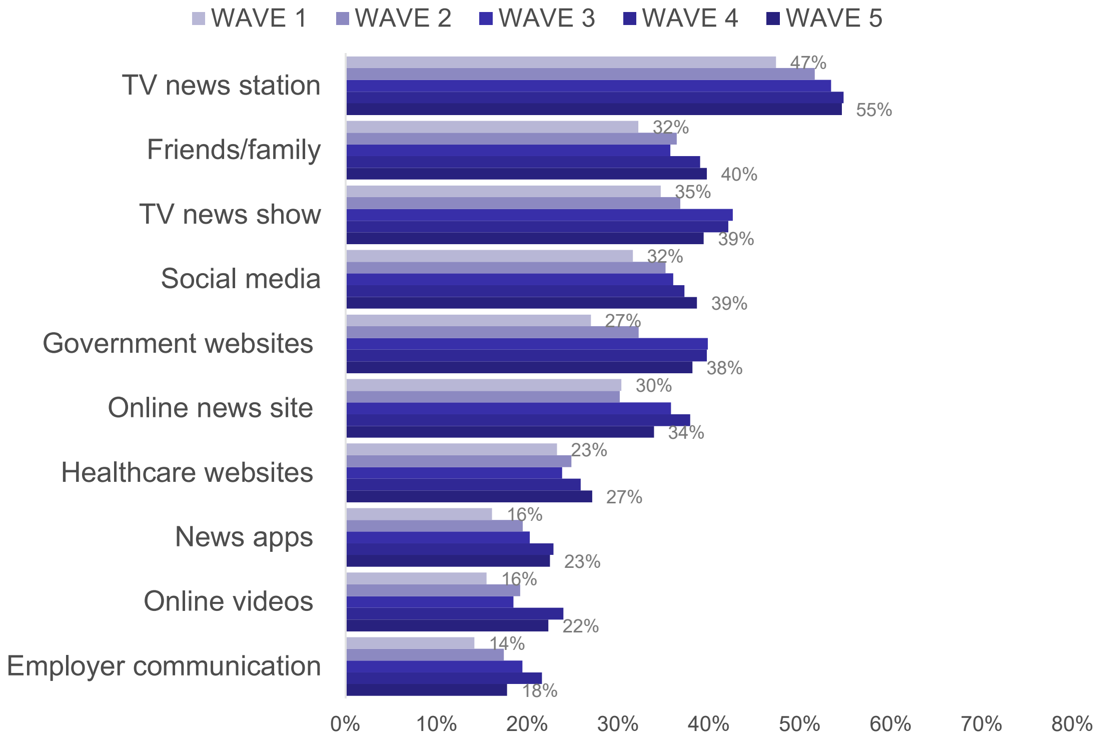
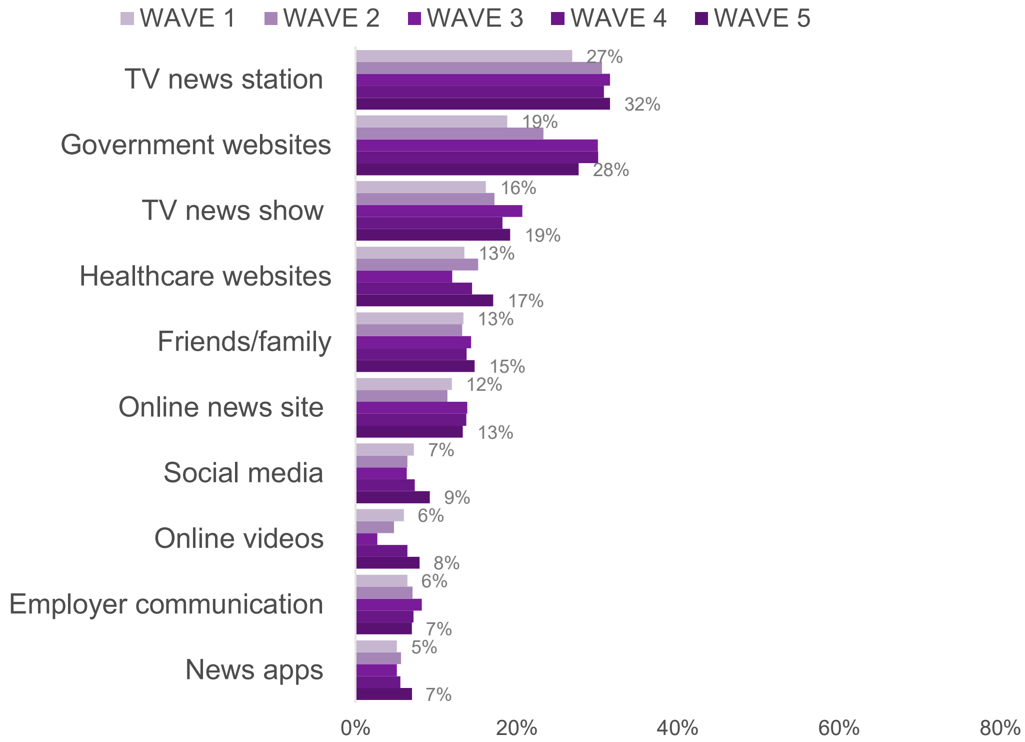
Social media & healthcare websites post consecutive increases in usage & trust

Top 10 Channels used to receive or look up information about coronavirus (COVID-19)



Top 10 Most trusted channels for information about coronavirus (COVID-19) – of channels used



- Boomers skew TV news station, while Millennials skew government websites
- Men are more likely to use and trust online videos, while women get more info from WOM & social media
- South more likely to use and trust TV news show

Source: Mindshare Pool Study

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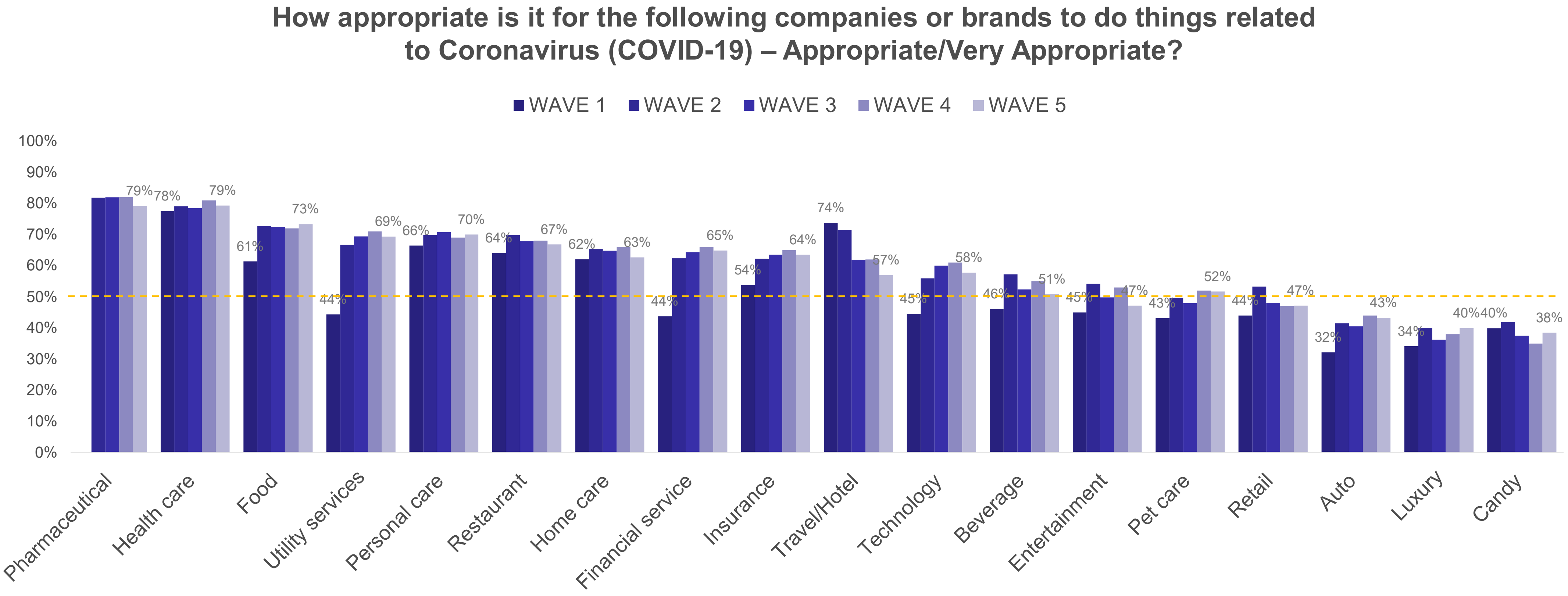
Americans continue to expect brands to take action and find it appropriate for most industries to pitch in and help



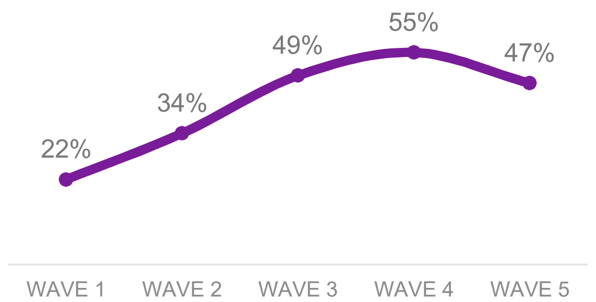
- GenZ less likely to think it's appropriate for brands to help
- Affluent (HHI $100K+) more likely to expect brands to take action across every category then lower income Americans (HHI under $30k)
- Men slightly more likely to consider it's appropriate for brands to step up to help, specifically auto & luxury brands

Source: Mindshare Pool Study

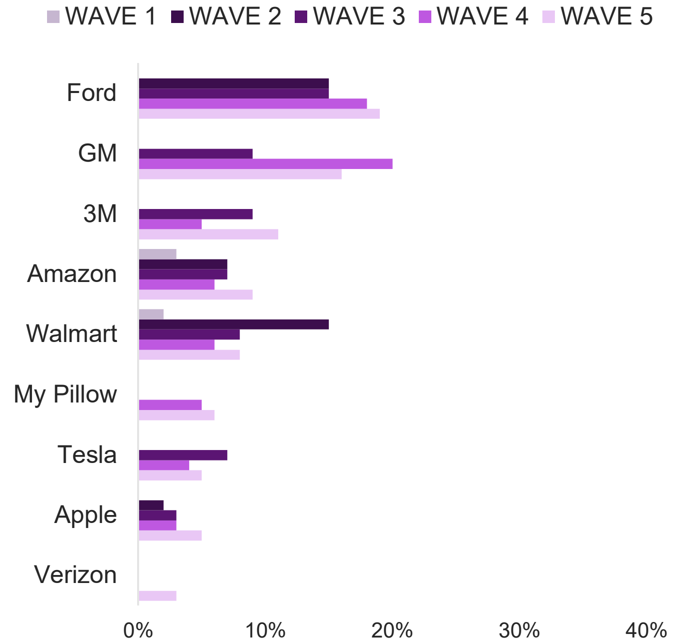
MINDSHARE

Awareness of companies helping slightly declined – still led by auto, retail, restaurant, medical & manufacturing brands

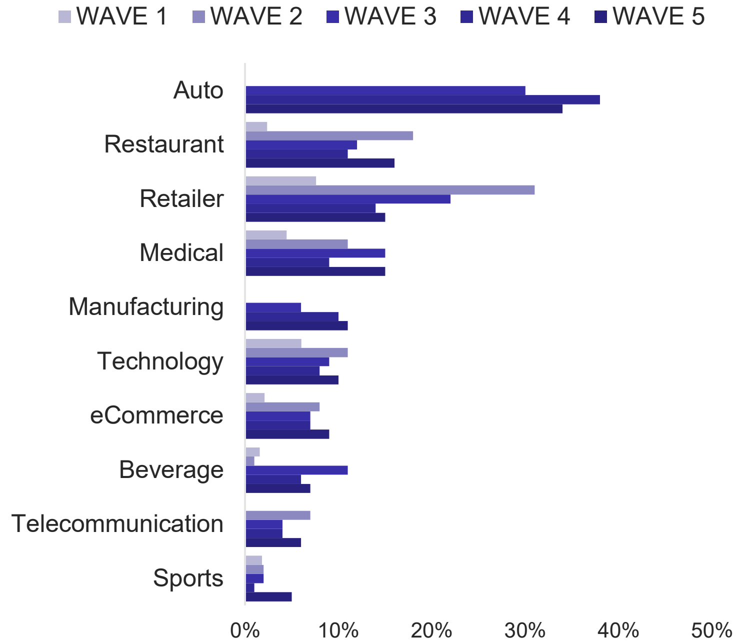
Aware any brands/companies are helping with the crisis *(unaided)*



Top 10 brands mentioned



Top 10 brand categories mentioned



"**Allstate** are giving back insurance premiums for cars. **Coty** and **Estee Lauder** are producing hand sanitizer. **Ford** I think were doing something to help with payment."

"**Kroger** and **Walmart** are paying their employees extra hero's wage."

"**Comcast** offering free internet, **Verizon** offering free data."

"**Amazon** - donated money. **Sam Adams** - food and beverage service workers fund. **Oprah** - donated money."

Source: Mindshare Pool Study

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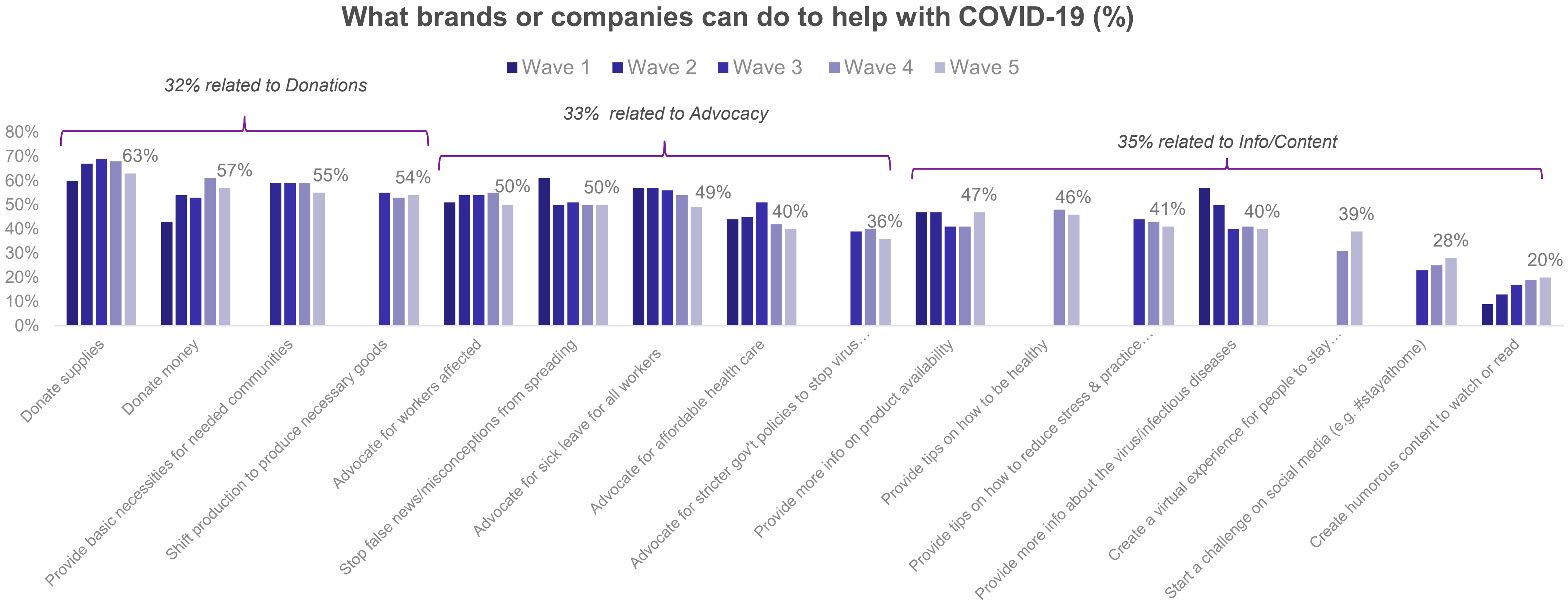
Americans are asking brands for more info & content from product availability to virtual experience; noting continual increase in humorous content



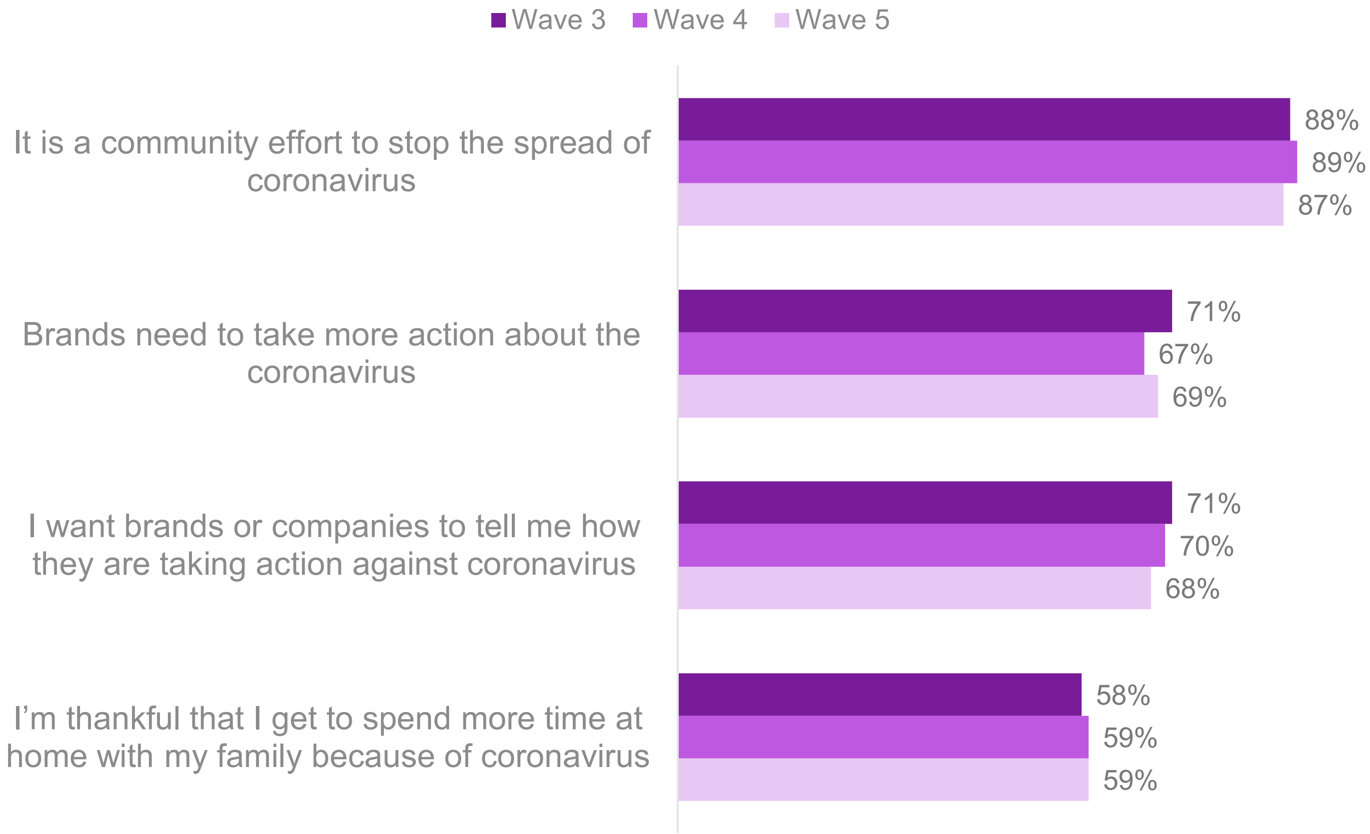
- Women think brands should take action across all categories compared to men, but especially want to see brands providing for those in affected communities
- Affluent Americans ($100k+) want to see brands advocating for stricter policies & start social challenges (e.g. #stayathome)

Source: Mindshare Pool Study

MINDSHARE

Americans believe through community togetherness will we stop the spread, and brands need to take more impactful action

Any agree with the following statements (%)



Brand Action – differences by Demo

70% (111)* of 40+ want brands to donate supplies

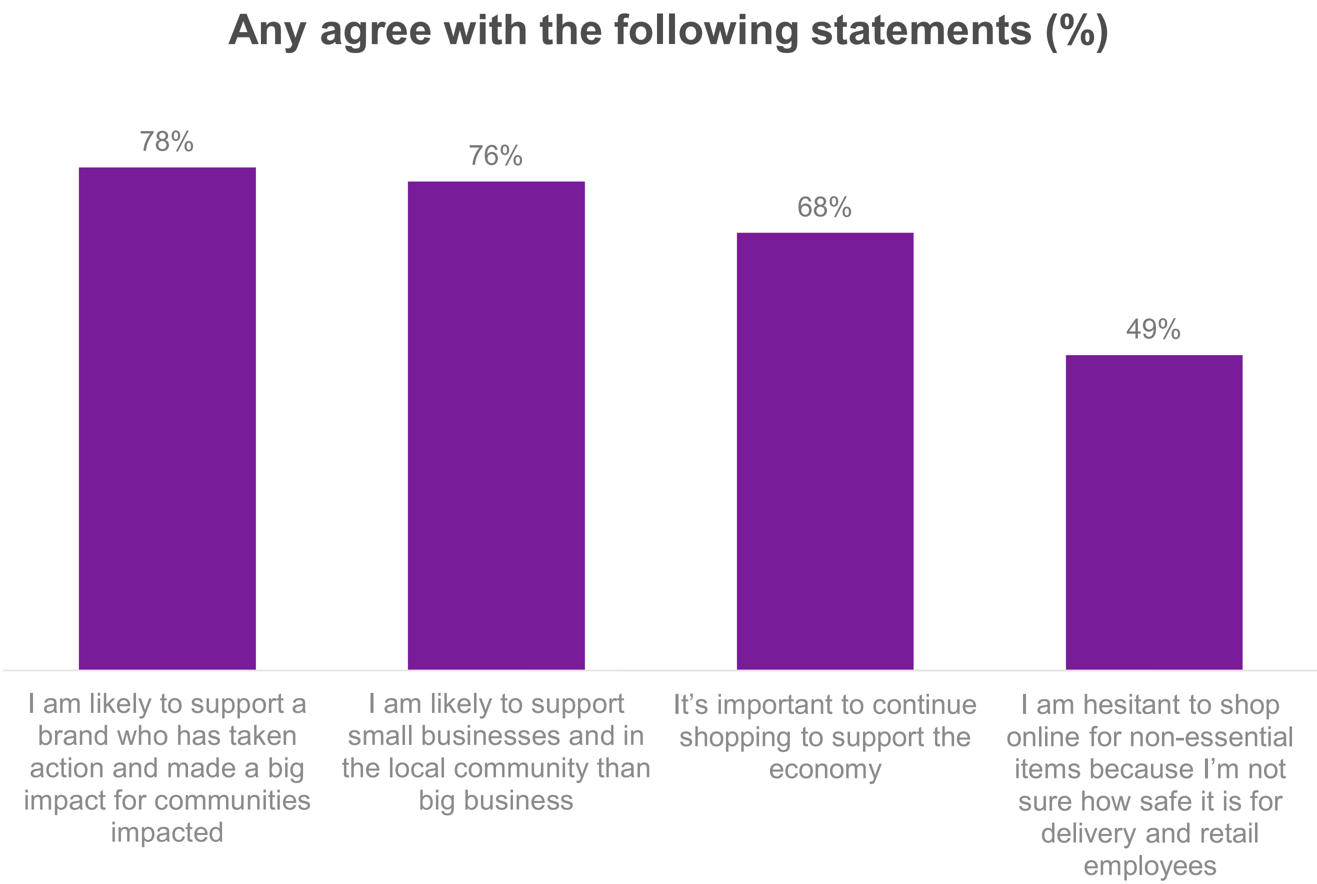
41% (114) of HHI >100K+ want brands to advocate for stricter gov't policies to contain spread

45% (113) of West want brands to advocate for affordable health care

Indexed against all Americans
Source: Mindshare Pool Study

MINDSHARE

Americans say they're likely to support a brand who have made a big impact towards COVID-19, but there's a shopping paradox



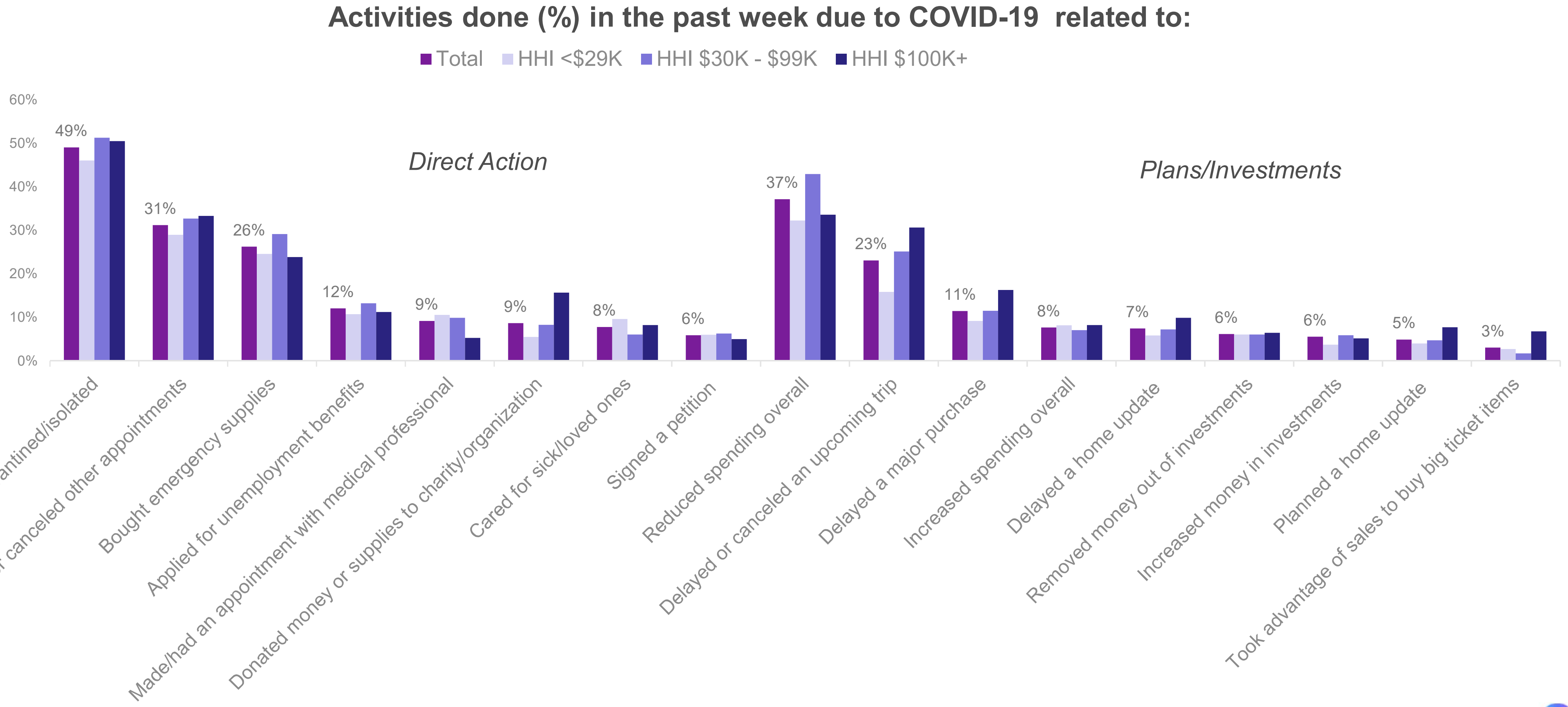
Affluent Americans are more likely to support brands during the crisis.

85% of $100K+ Households are likely to support a brand who has taken action and made a big impact *(vs. 78% Middle class Americans HHI $30K-$99K; 74% Low income HHI <$30K)*

74% of $100K+ Households say it's important to continue shopping to support the economy *(vs. 70% Middle income, 61% Low income)*

Source: Mindshare Pool Study

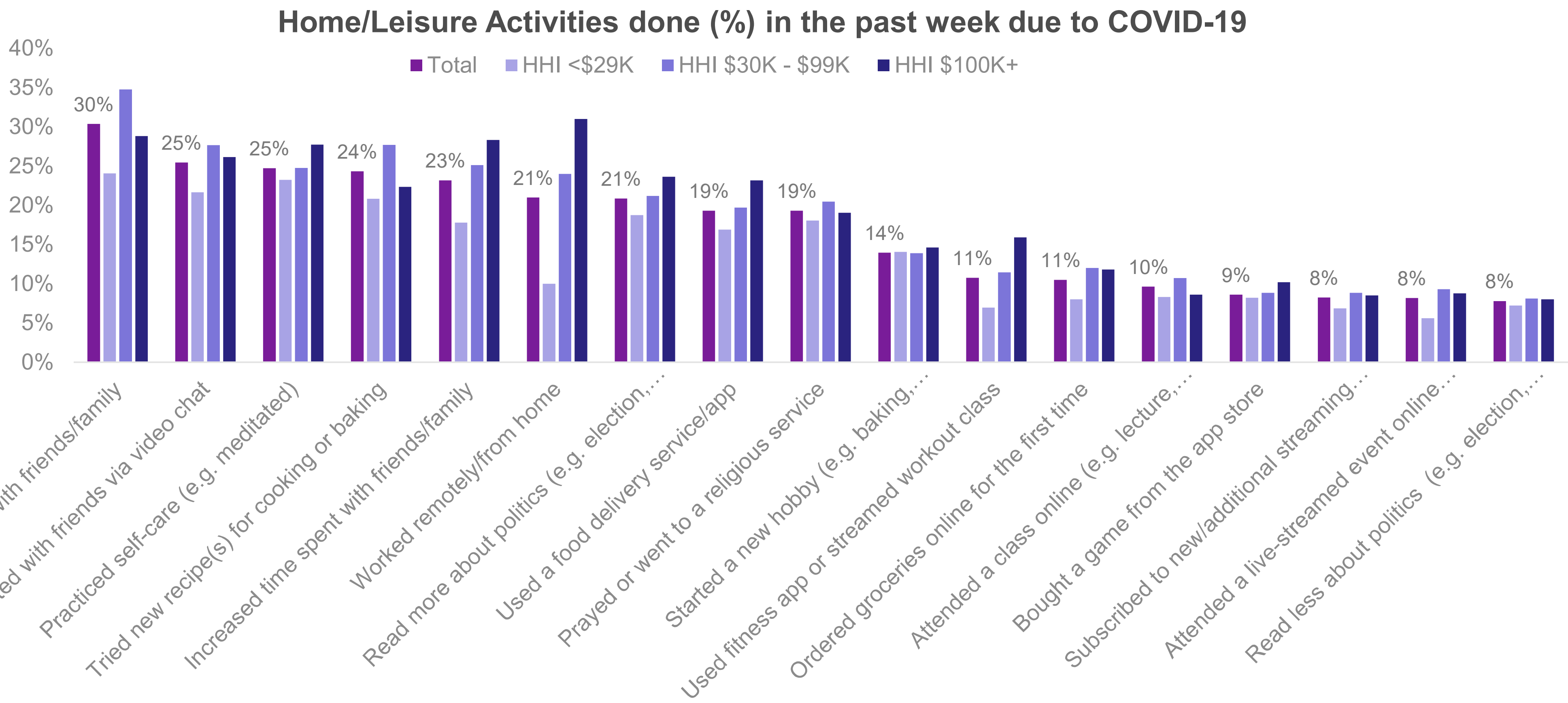
Affluent Americans are more likely to have taken advantage of sales, more Middle income Americans have reduced spending, while Low income least likely to take action



Source: Mindshare Pool Study

MINDSHARE

Middle income & Affluent Americans are more likely to have WFH & be connected virtually, while low-income Americans have the least luxury to stay home



Source: Mindshare Pool Study

Americans are continuing to purchase basic needs, including fresh food – self-care, beauty & home supplies are top non-essential items purchased

Of items purchased
within the past week

60% related to basic needs

19% related to cleaning/ protective gear

21% related to hobbies/other

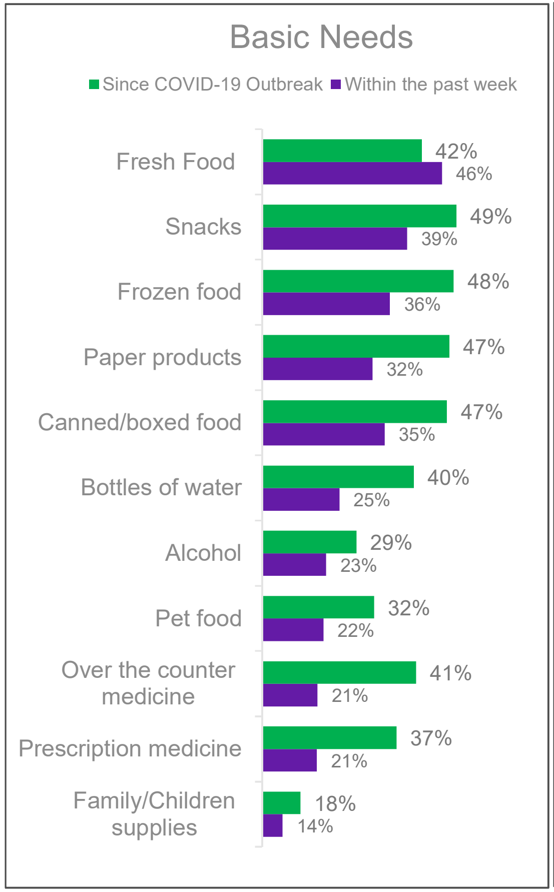
Of items purchased
Since COVID-19 outbreak

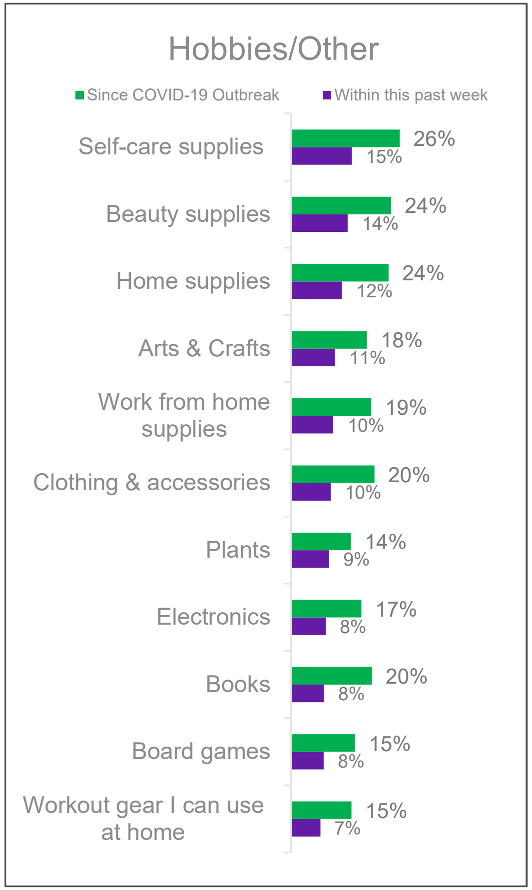
52% related to basic needs

23% related to cleaning/ protective gear

25% related to hobbies/other

Items purchased since COVID-19





Self-reported purchase data
Source: Mindshare Pool Study

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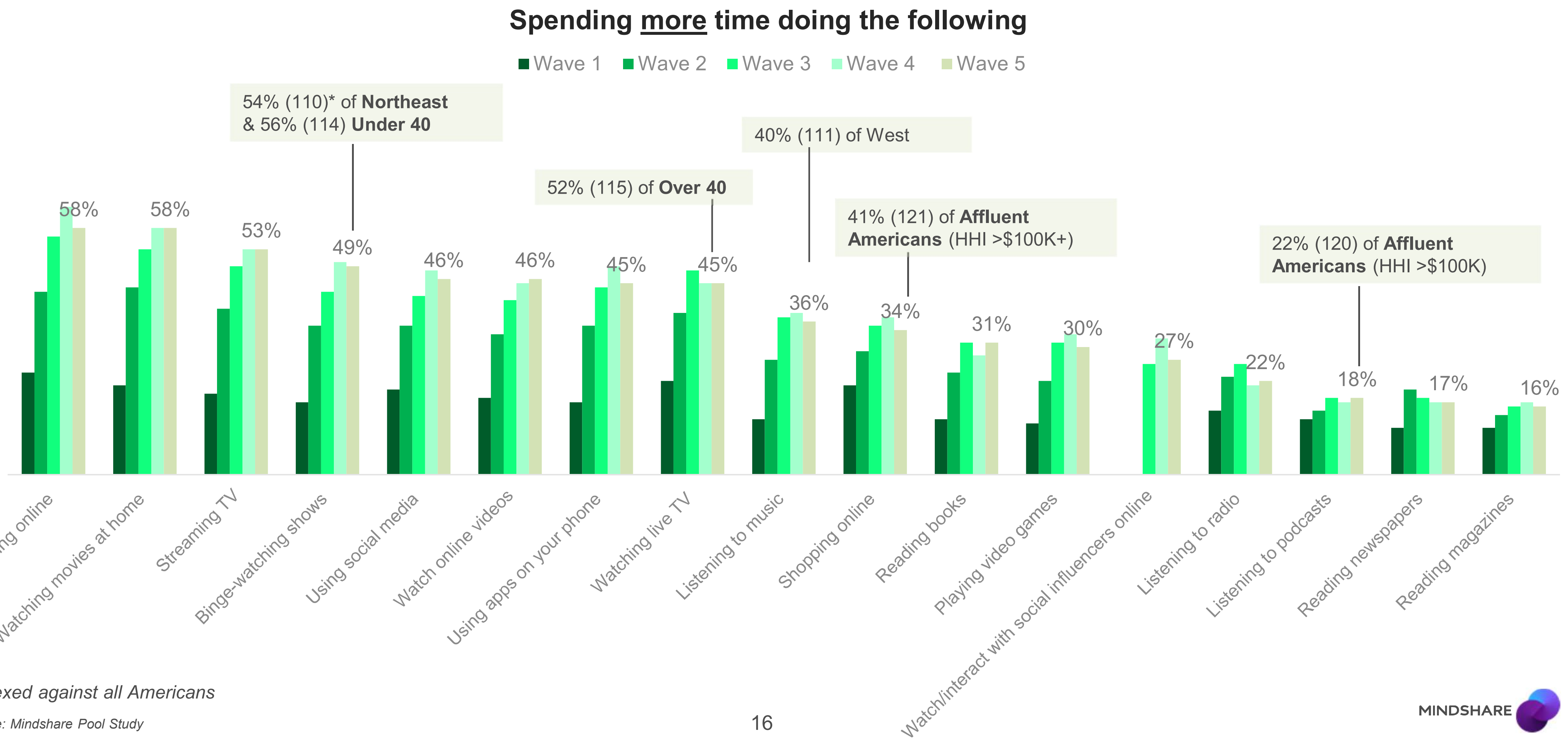
Americans' time continues to be spent online, slight dip using apps on phone, with video & social being top ways to stay entertained

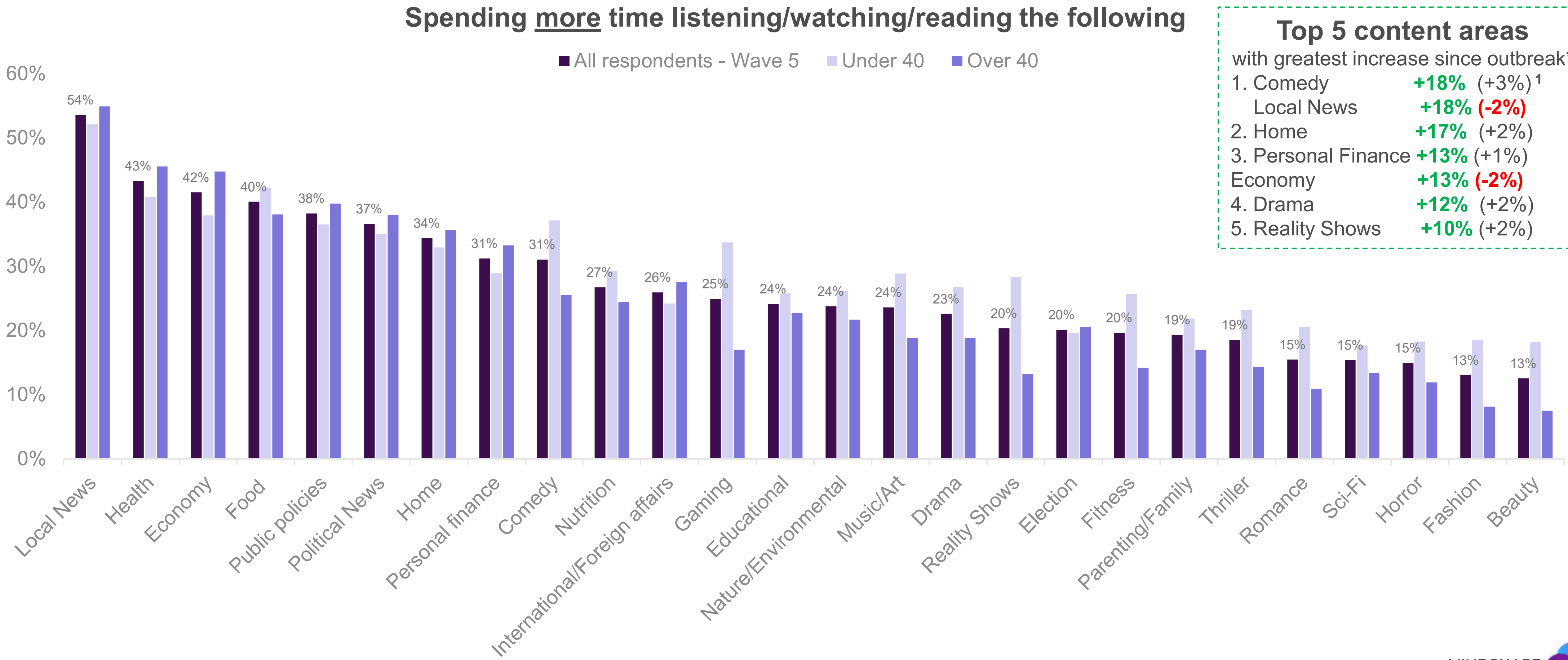


**Indexed against all Americans*

Source: Mindshare Pool Study

MINDSHARE

Americans are tuning into more content related to comedy driven by those under 40, who are also more interested in gaming & reality shows, while 40+ prefers news



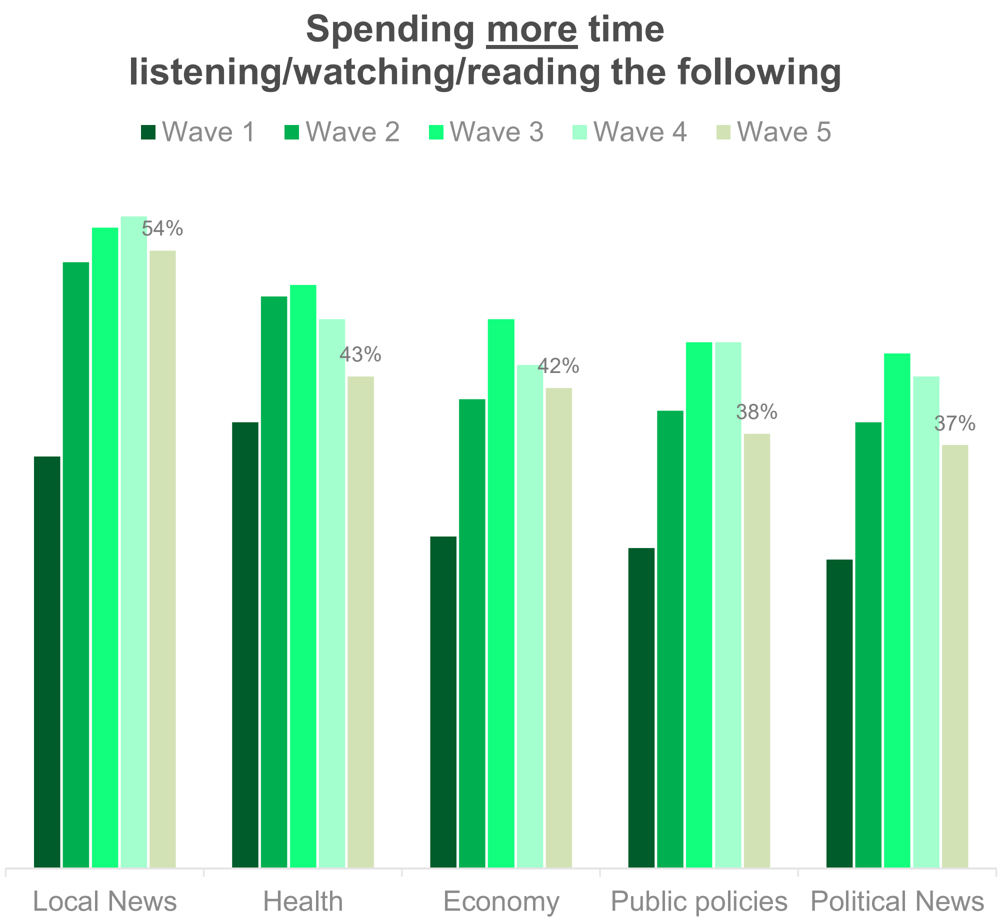
Top 5 content areas
with greatest increase since outbreak*

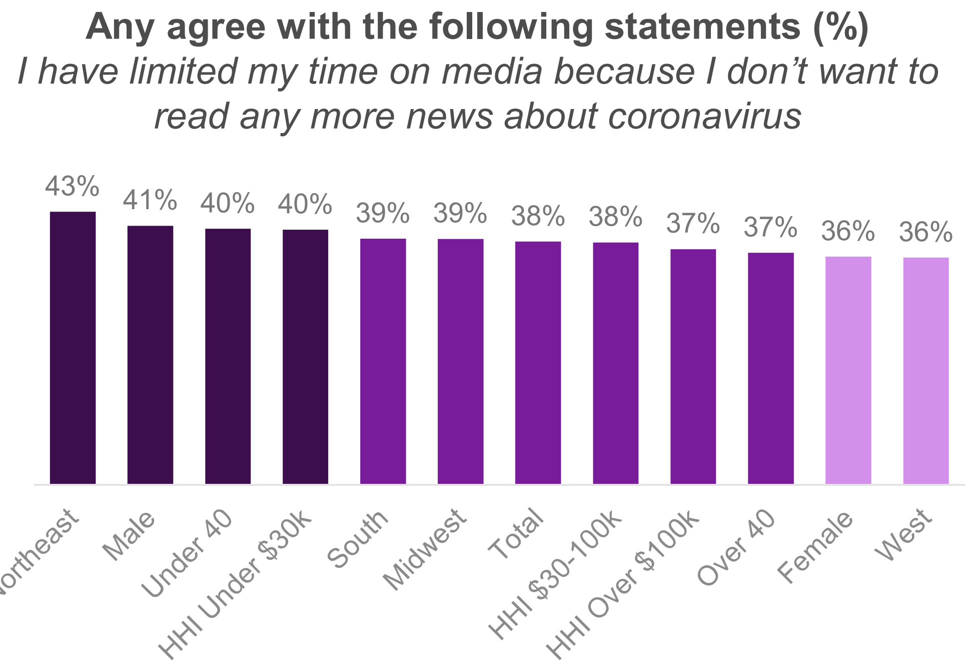
1. Comedy	+18%	(+3%) [1]
Local News	+18%	(-2%)
2. Home	+17%	(+2%)
3. Personal Finance	+13%	(+1%)
Economy	+13%	(-2%)
4. Drama	+12%	(+2%)
5. Reality Shows	+10%	(+2%)

Source: Mindshare Pool Study

MINDSHARE

Dip in health & economy content could be tied to news fatigue & fear (which can lead to avoidance or complacency)



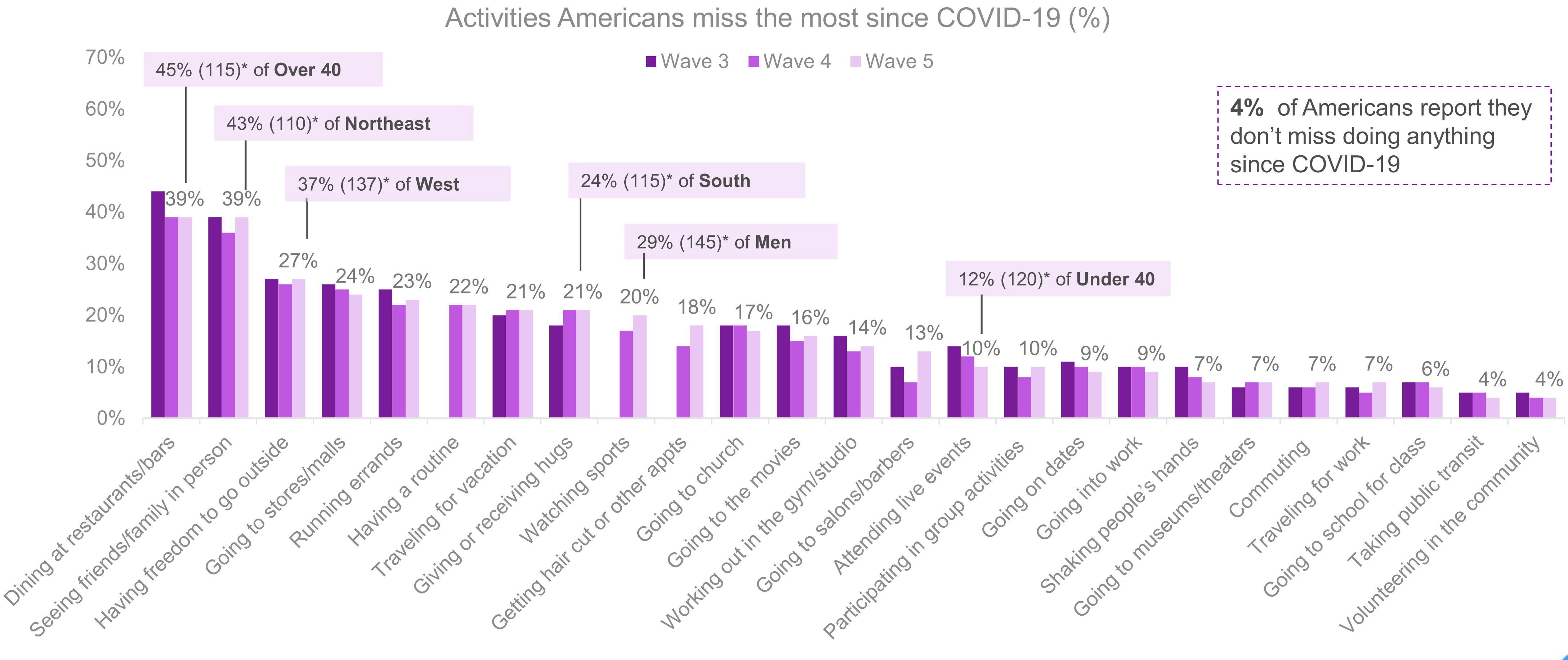


I'm afraid that I or someone in my family …
71% Will become sick with coronavirus
64% Will lose a job because of coronavirus

Source: Mindshare Pool Study

MINDSHARE

Americans still miss the normalcy of life before – from dining out to having a routine to watching sports



**Indexed against all Americans*

Source: Mindshare Pool Study

MINDSHARE

Americans continue to try to maintain their health, using virtual alternatives

Health & Wellness going virtual

19% Used a food delivery app/service this week

11% Streamed a workout class (16% of Affluent Americans)

11% Ordered groceries online for the first time

60% (107)* of **Women** are worried about putting on weight *(vs. 51 of Men)*

59% (125)* of **Affluent Americans** HHI $100K+ are more likely to visit a teledoctor if sick in the future *(vs. 51% Middle class, 46% Low income)*

Any agree with the following statements (%)

**Indexed against all Americans*

Source: Mindshare Pool Study

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THANK YOU!