Approach

❖ 18+ US nationally representative sample, leveraging 2019 Scarborough respondents
❖ Online survey
❖ Sample size: 1,058 for Week 1; totaling 2,575 across 4 weeks of fieldwork for national sample
❖ Field period for Week 1: March 24 – 31, 2020
❖ Oversample in 5 DMAs that were initially hit hard (“hot spots”):
  ➢ Boston, Chicago, New York, San Francisco, Seattle
  ➢ N=250 oversample in each DMA across the initial 4 weeks
❖ Nielsen partnered with Wizer to administer the survey and delivery the results in their end-to-end research platform

https://www.getwizer.com/
Disruption is Significant

It is apparent the virus is having significant impact on, disruption of our lives – across all facets. The impact is most significant in these areas:

- Worry/Concerns
- Impact on Work
- Social
- Sports
## Areas of Concern Related to COVID-19

Half of Americans express concern (moderate or major) about all measures.

There is most concern about things outside of our control (economy, health of loved ones, duration of impact).

<table>
<thead>
<tr>
<th>Area</th>
<th>Level of concern</th>
<th>N = 1058</th>
</tr>
</thead>
<tbody>
<tr>
<td>The impact of Coronavirus on the economy</td>
<td>69%</td>
<td>26%</td>
</tr>
<tr>
<td>How Coronavirus might affect the health of a loved one (family member or close friend)</td>
<td>58%</td>
<td>37%</td>
</tr>
<tr>
<td>How long we will be feeling the impact of Coronavirus</td>
<td>57%</td>
<td>30%</td>
</tr>
<tr>
<td>Having access to factual information on Coronavirus from trusted sources</td>
<td>44%</td>
<td>38%</td>
</tr>
<tr>
<td>The accuracy of information on Coronavirus provided by the media</td>
<td>44%</td>
<td>43%</td>
</tr>
<tr>
<td>My own / my family's financial situation</td>
<td>35%</td>
<td>43%</td>
</tr>
<tr>
<td>The impact of Coronavirus on my day-to-day activities/daily routine</td>
<td>33%</td>
<td>49%</td>
</tr>
<tr>
<td>The media overstating the severity of the Coronavirus pandemic</td>
<td>33%</td>
<td>35%</td>
</tr>
<tr>
<td>Having access to the products my family needs while quarantined</td>
<td>33%</td>
<td>49%</td>
</tr>
<tr>
<td>How Coronavirus might affect my own health</td>
<td>31%</td>
<td>52%</td>
</tr>
<tr>
<td>The impact of Coronavirus on my job in the long term (the summer and beyond)</td>
<td>28%</td>
<td>31%</td>
</tr>
<tr>
<td>The impact of Coronavirus on my job in the short term (next few weeks/months)</td>
<td>27%</td>
<td>29%</td>
</tr>
<tr>
<td>The impact of Coronavirus on my mental health</td>
<td>20%</td>
<td>35%</td>
</tr>
<tr>
<td>The implementation of a curfew</td>
<td>18%</td>
<td>32%</td>
</tr>
</tbody>
</table>
Impact of COVID-19 on Employment

Three main areas of work disruption

I continue to work outside the home/commute to work - 45%
I have started working from home since the Coronavirus outbreak - 35%
I typically work from home and continue to do so - 13%
I am now working reduced hours due to employer cutbacks - 9%
Something else - 6%

Select all that apply.
Most Missed Lifestyle Change

Socially-based activities are missed most. Fewer Americans report missing more labor-intensive activities like office work and attending school.

Nearly 1-in-5 miss watching/listening to live sports or attending live events (including sports)

Select three.
Given that there is little or no broadcasting of sporting events/games, how are you replacing the time you used to spend keeping up with sports?

There is no clear sports-related alternative for sports enthusiasts. Americans are shifting viewing to non-sports live or streamed programming.

Watching repeat broadcasts is the top Sports-related activity to replace live sports programming.
Americans are Adapting…

Americans are adapting, adjusting to the disruption. Specifically, changes are being made in how they are spending time and dollars.

➔ Media-related activities
➔ Other activities
➔ Spending
Change in Media-Related Activities

With Stay-At-Home orders now firmly in place for most states, we are seeing a surge in usage of streaming services, news consumption and internet searches.

58% of Americans are watching/listening to sports less often

Answer for each of the following:

- Using streaming services to watch movies/programs (Netflix, Hulu, etc.)
- Watching or listening to news
- Internet searches
- Playing games online or using a gaming device (Playstation, Nintendo, etc.)
- Social media sites (Facebook, Instagram, etc.)
- Watching TV programming (not news)
- Reading books (print or digital)
- Listening to the radio (including AM/FM, streaming online (SXM), etc.)
- Watching or listening to sports
- Going to the movies

A lot more often  A little more often  About the same  A little less often  A lot less often

N = 1058
Change in Other Activities

While there’s an increase in some activities, we also see a decline in these same activities, at similar levels.

Answer for each of the following:
Effect of COVID-19 on Spending

Most cite change in spending (3-in-4).

Change is centered on essential only spending – none or little on non-essentials.
Significant Shifts in Consumer Behavior Related to:

➔ NEWS:
  ● The change in news consumption levels and sources are profound.

➔ RELIANCE ON DIGITAL MEDIA/INTERNET
  ● Consumers are now relying on digital resources, using them in very new and different ways.
Greater Appetite for News

52% are watching or listening to news more

20% a lot more

60% are watching or listening to Coronavirus news for 2+ hours a day

16% 4+ hours a day
Most Relied On News Source

TV is most relied upon for Coronavirus news, followed by social media and then government websites.
In addition to stocking up, many are engaging in different types of online activities for the first time.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Take out or delivery from a local restaurant</td>
<td>29%</td>
</tr>
<tr>
<td>Ordered non-grocery items online</td>
<td>20%</td>
</tr>
<tr>
<td>Stocked up on over-the-counter medicines/healthcare products</td>
<td>20%</td>
</tr>
<tr>
<td>Stocked up on prescriptions</td>
<td>16%</td>
</tr>
<tr>
<td>Ordered groceries online</td>
<td>15%</td>
</tr>
<tr>
<td>Online educational tools</td>
<td>15%</td>
</tr>
<tr>
<td>Online workouts</td>
<td>12%</td>
</tr>
<tr>
<td>Used restaurant delivery service (Grubhub, UberEats, etc.)</td>
<td>10%</td>
</tr>
<tr>
<td>Paid to download and watch individual movies or TV show</td>
<td>10%</td>
</tr>
<tr>
<td>Signed up for a new video streaming service (Netflix, Hulu, etc.)</td>
<td>10%</td>
</tr>
<tr>
<td>Signed up for or participated in virtual health/telemedicine with your physician</td>
<td>7%</td>
</tr>
<tr>
<td>Signed up for a new audio service (SiriusXM, Spotify, etc.)</td>
<td>2%</td>
</tr>
<tr>
<td>Signed up for a meal home delivery service (Blue Apron, Hello Fresh, etc.)</td>
<td>2%</td>
</tr>
<tr>
<td>None of these</td>
<td>32%</td>
</tr>
</tbody>
</table>
Changed News Sources Since Outbreak

About 1-in-4 Americans have changed news sources since the COVID-19 outbreak started. Stated reasons include:

➔ heavier reliance on local media sources
➔ desire for accurate/science-based information
➔ lower comfort with “mainstream” media

“Local news has been very important since the virus ... also been paying attention to governors across the country and what they all have to say, especially in New York, New Jersey, Washington, and California.”

“Before ...relied more heavily on social media ... have since begun looking for more truthful sources and rely more heavily on the CDC website and other science-based sources.”

“... mainstream media was portraying the coronavirus in such a way that was meant to induce panic ... Mainstream media tends to report on what garners clicks, not what’s necessarily the important statistics.”
Preferred Source for Information on Local Businesses

Large proportions cite use of digital resources for information about local businesses.
In Summary:

- The research confirms the disruption is significant, impacting virtually every facet of our lives.

- Americans are responding – changing what/how they consume media, in addition to changes in other activities and their spending pattern.

- Of note, are the changes related to the consumption of News. We strongly recommend watching this activity over time.

- American are using the digital media/internet in new and different ways as they seek to adapt.