

nielsen

COVID-19 IMPACT STUDY

Insight Into Consumer Behavior and Perceptions in a Pandemic Environment

April 3, 2020

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wizer

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



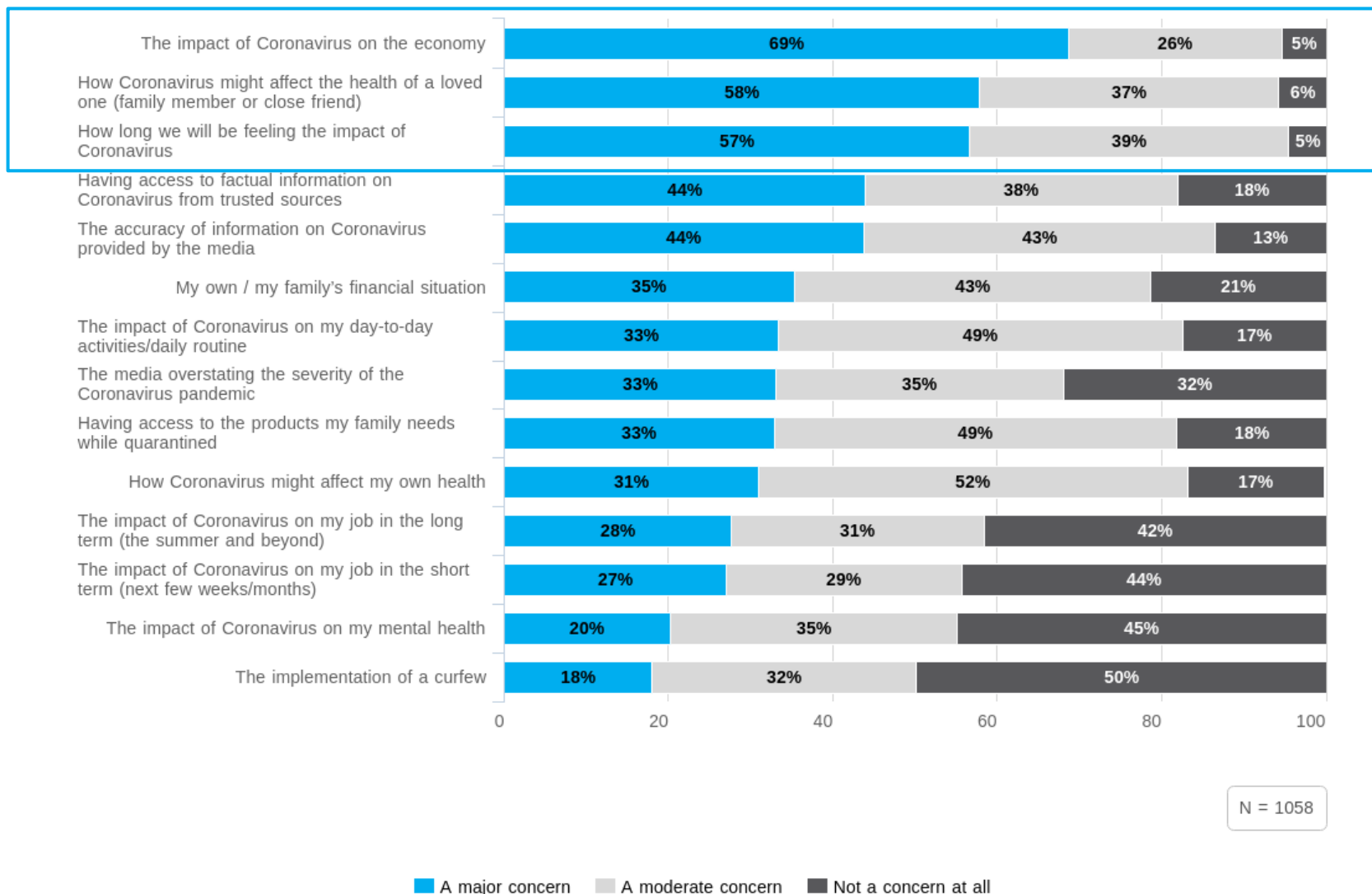
<https://www.getwizer.com/>

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

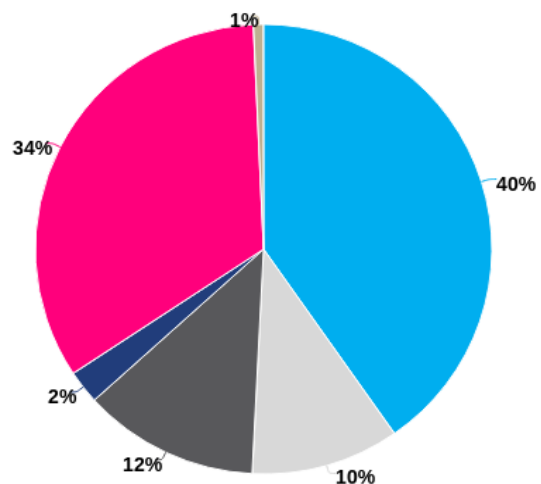


Half of Americans express concern (moderate or major) about all measures.

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

Impact of COVID-19 on Employment

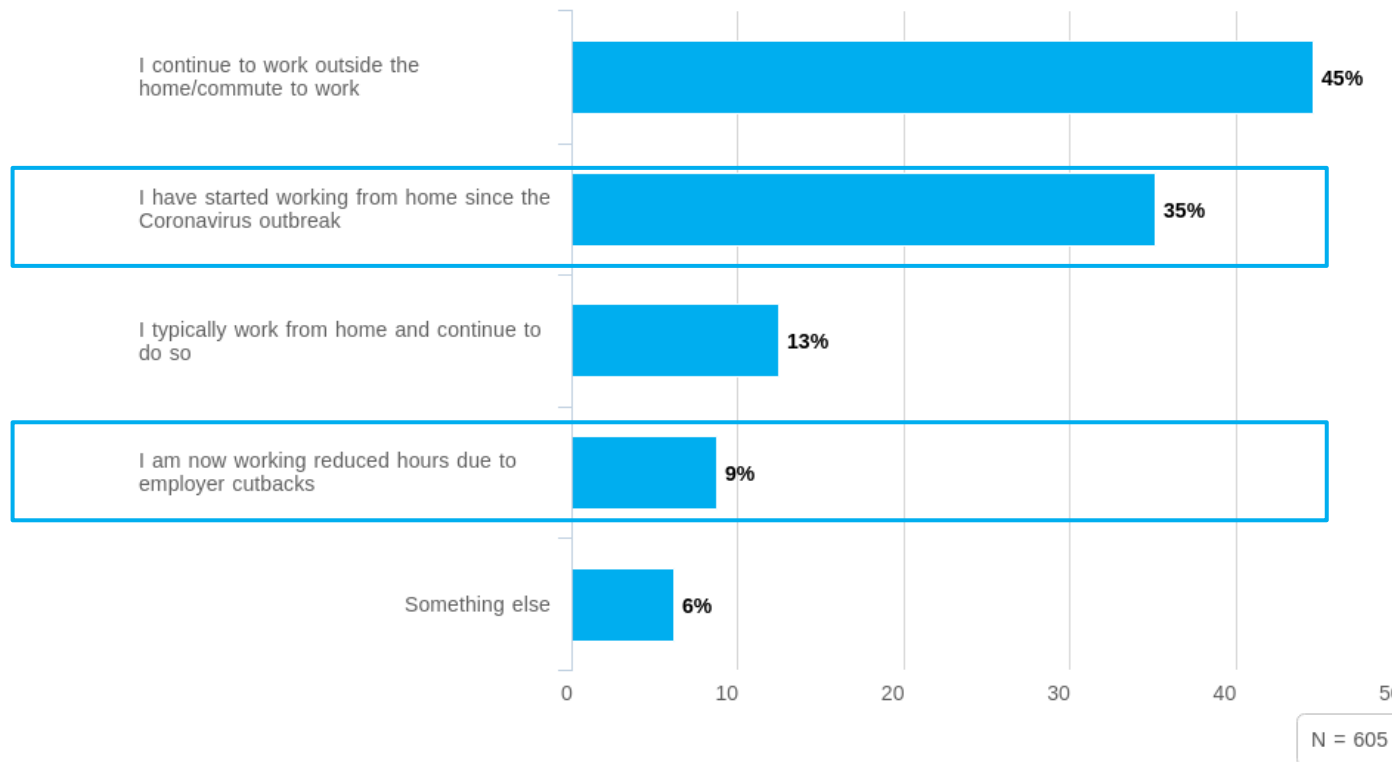
Three main areas of work disruption



- Employed full-time
- Employed part-time
- Temporarily unemployed due to Coronavirus
- Temporarily unemployed for another reason (aside from Coronavirus)
- Not employed (retired, student, homemaker, etc.)
- Refused

N = 1058

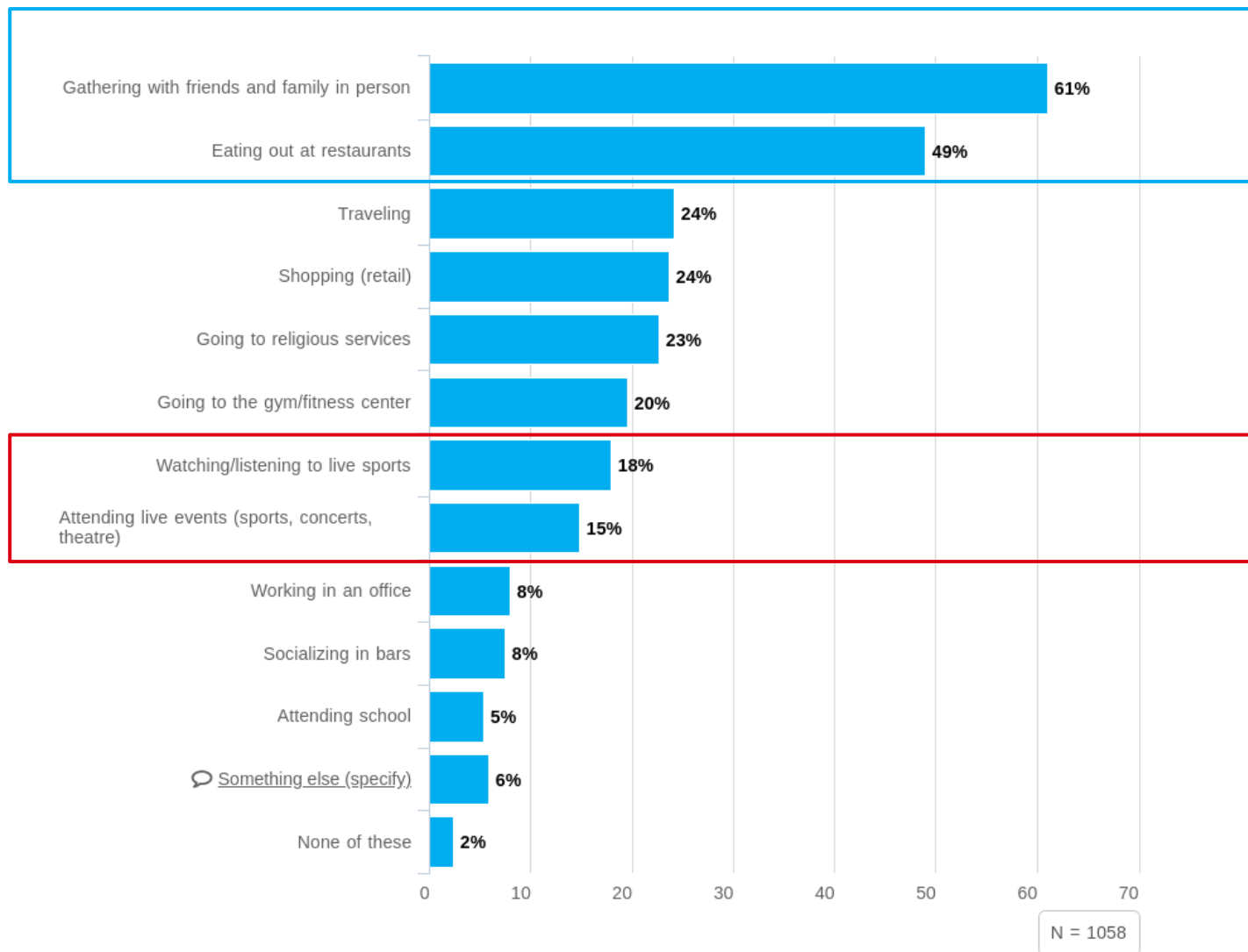
Among Employed



N = 605

Select all that apply.

Most Missed Lifestyle Change

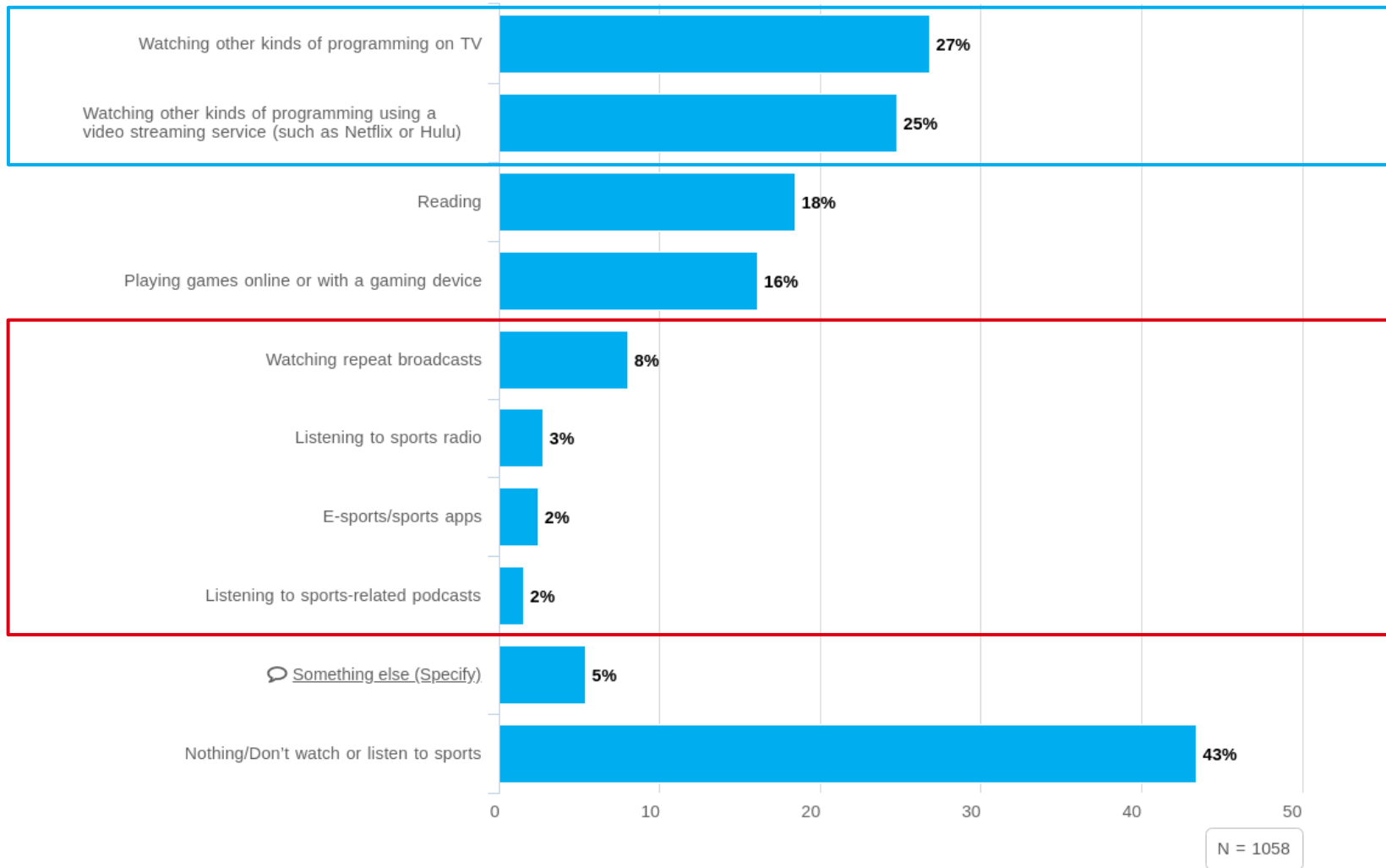


Socially-based activities are missed most. Fewer Americans report missing more labor-intensive activities like office work and attending school.

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

Select three.

Activities Replacing 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.

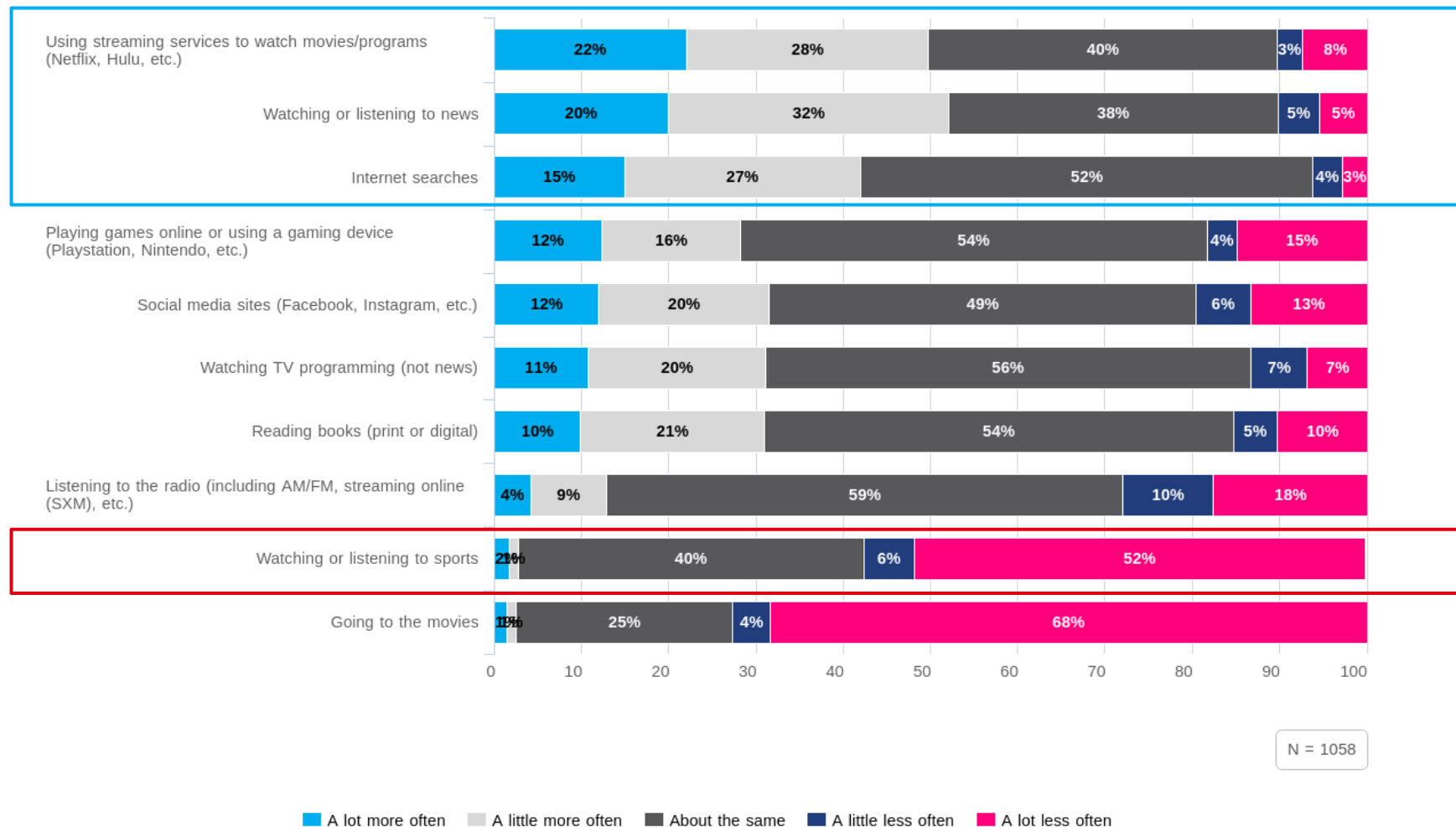
Given that there is little or no broadcasting of sporting events/games, how are you replacing the time you used to spend keeping up with sports?

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

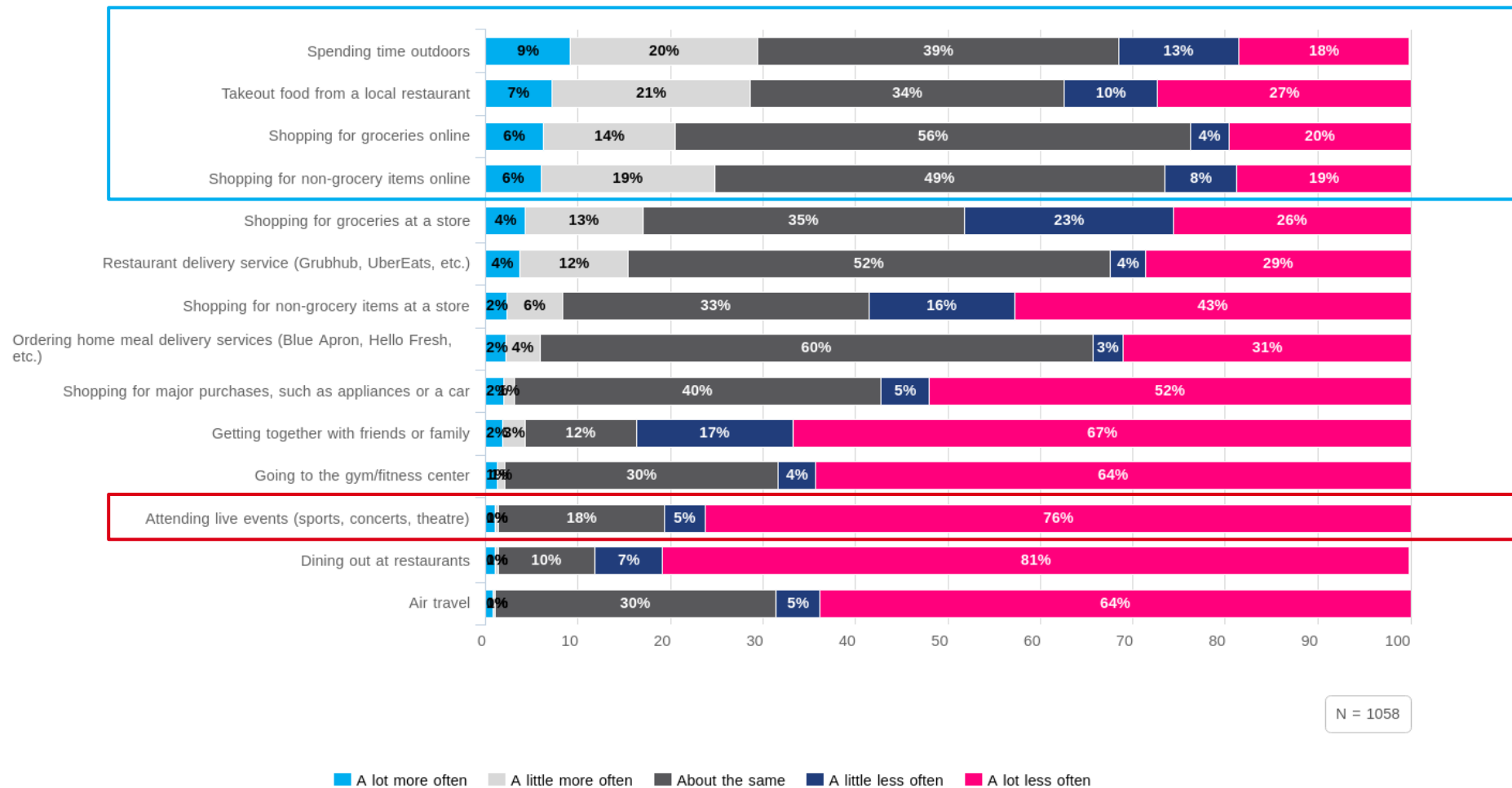


With Stay-At-Home orders now firmly in place for most states, we are seeing a surge in usage of streaming services, news consumption and internet searches.

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

Answer for each of the following:

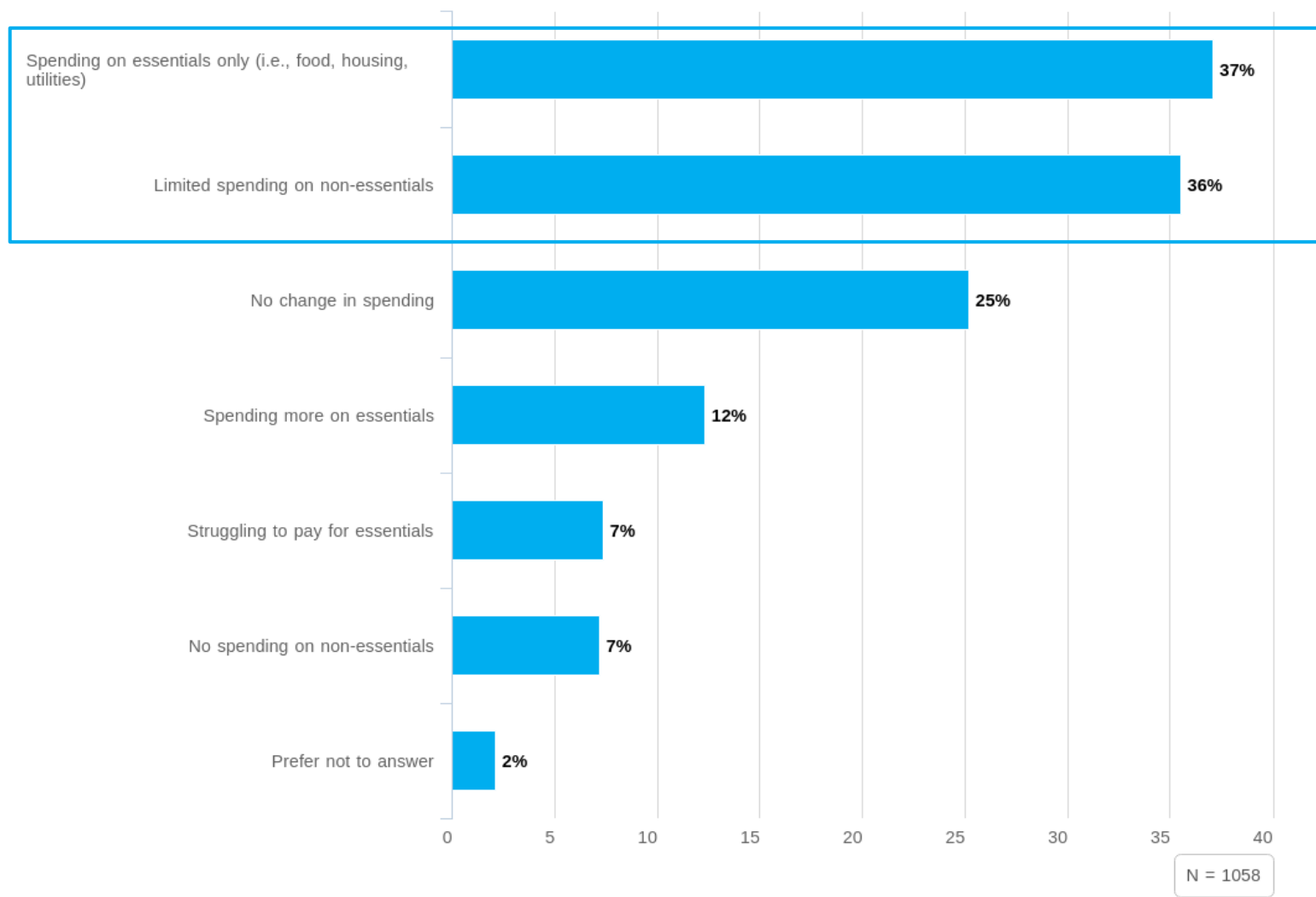
Change in Other Activities



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

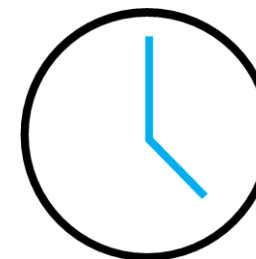
- Consumers are now relying on digital resources, using them in very new and different ways.

Greater Appetite for News



52% are watching or listening to news more

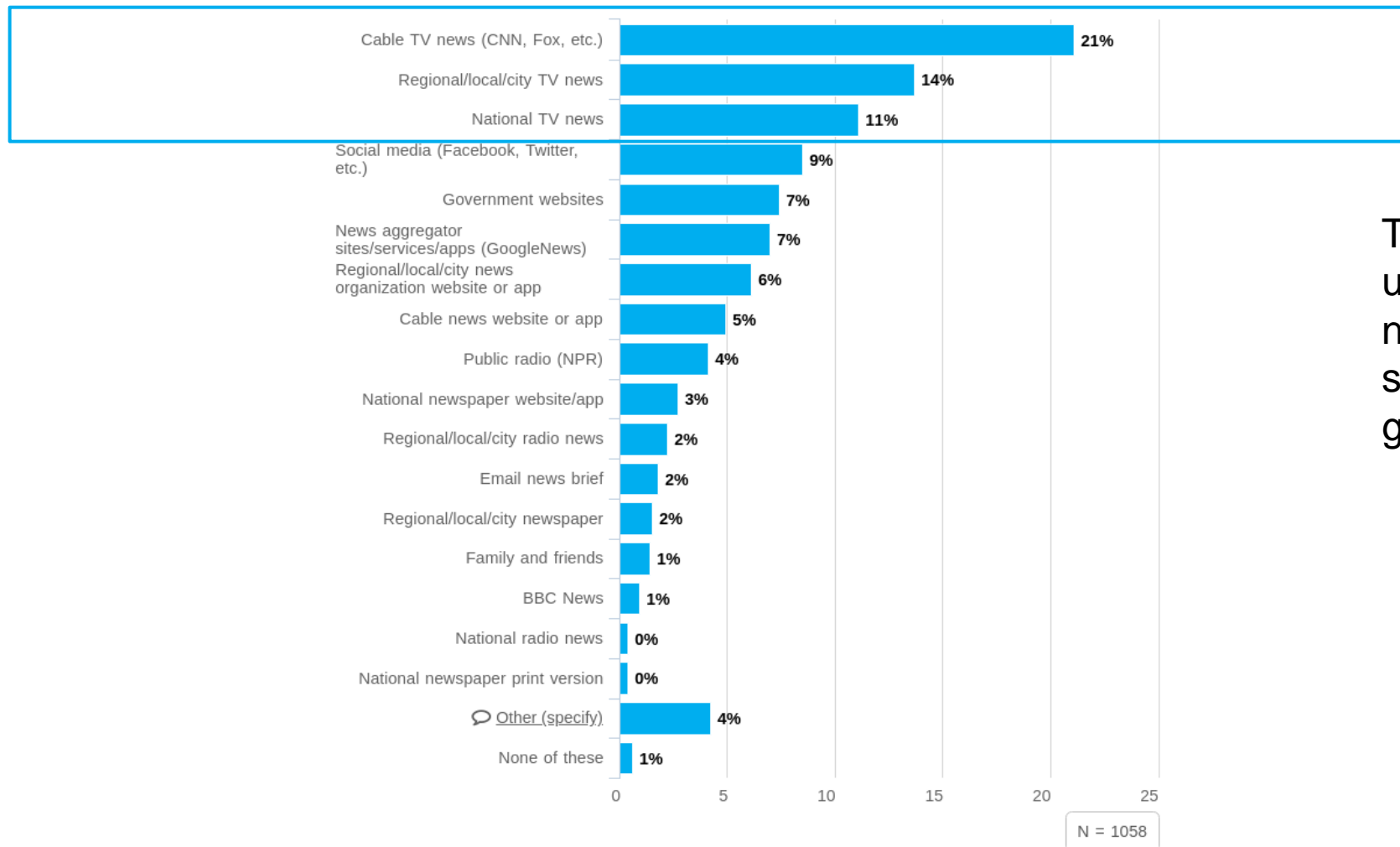
20% a lot more



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

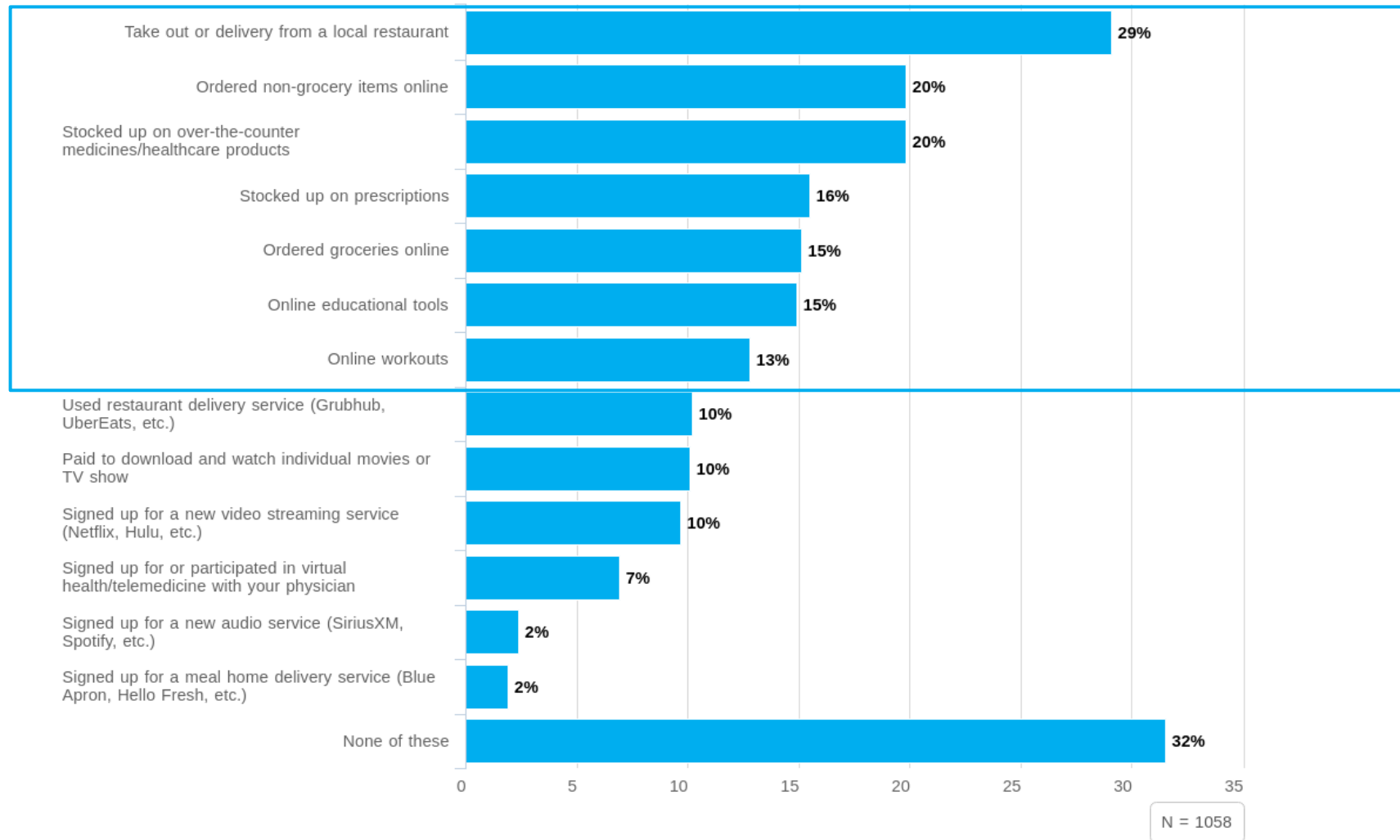
16% 4+ hours a day

Most Relied On News Source



TV is most relied upon for Coronavirus news, followed by social media and then government websites.

Activities Commenced Due to COVID-19

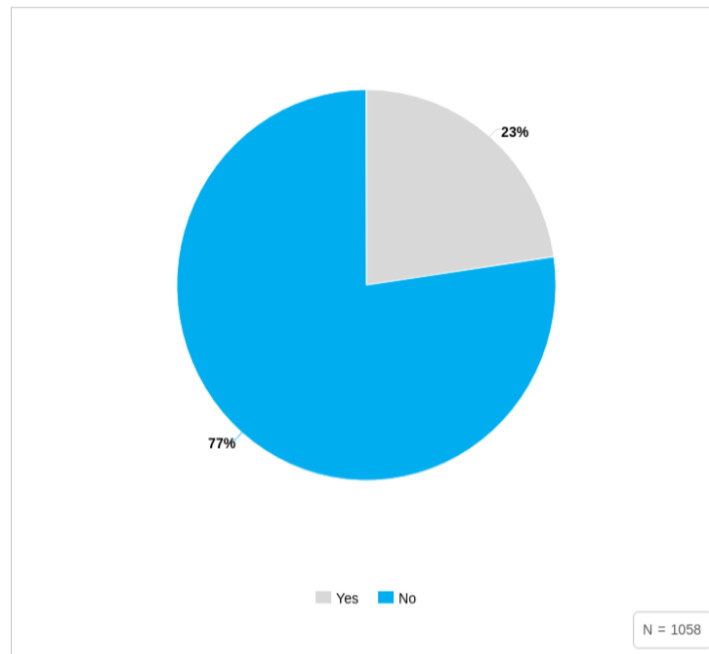


In addition to stocking up, many are engaging in different types of online activities for the first time.

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

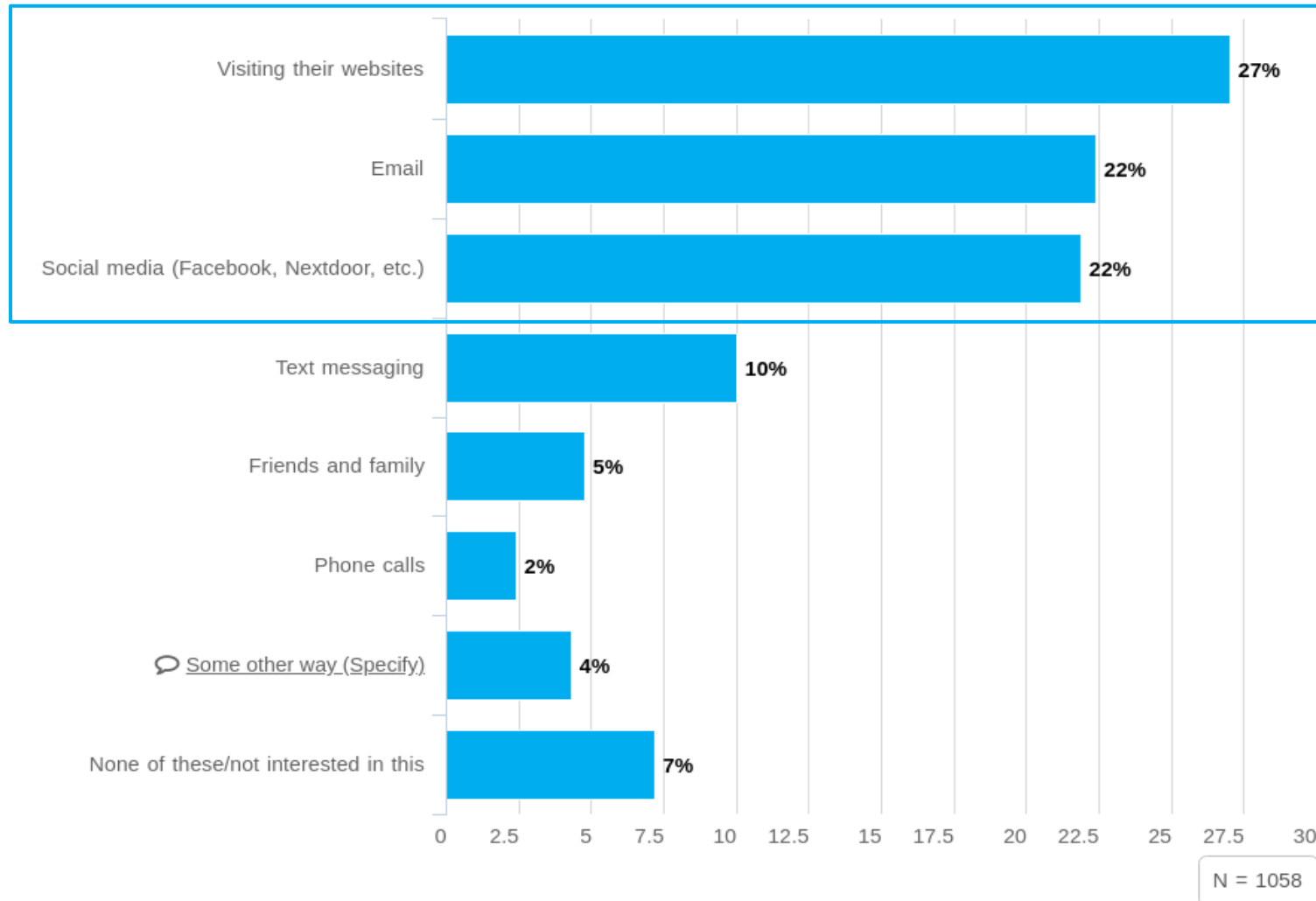


“**Local** news has been very important since the virus ... also been paying attention to **governors** across the country and what they all have to say, especially in New York, New Jersey, Washington, and California”

“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.

