



REOPENING AMERICA

UP-TO-THE-MOMENT U.S. CONSUMER SENTIMENT DURING THE PANDEMIC

Insights from the Resonate COVID-19
Connected Flash Study: Wave Three Report

INTRODUCTION

In March 2020, the country and the world were struck with the evolving reality of a modern pandemic. In April, almost every state in the country was under stay-at-home orders. Consumers grappled with grocery delivery options and watched streaming church services on Sunday morning. Now, as we approach late May, all but a small handful of states are in a phased reopening. Spring afternoons are beckoning diners back to socially distanced patios and grabbing a mask on your way out the door is as intuitive as grabbing your keys.

Organizations of all sizes and industries have been on a roller coaster of emotions — reactions and shifts in messaging, marketing, operations and more. To stay engaged and relevant — heck, to even just try to survive — you’re monitoring a constantly developing consumer landscape. What you knew three months ago is irrelevant. You need to know where your consumer’s head is today, not where it was 15-30-45 days ago.

As a pioneer in consumer data and intelligence, we intimately know how important it is to understand the unique and fluid features of your audience. That’s why we have committed to an ongoing study of the impact of the COVID-19 crisis on the psyche of the U.S. consumer. Think about it: a month ago, you may have been stuck at home 24/7. Today, you could be looking at going back into the office one day a week and taking cautious trips to local

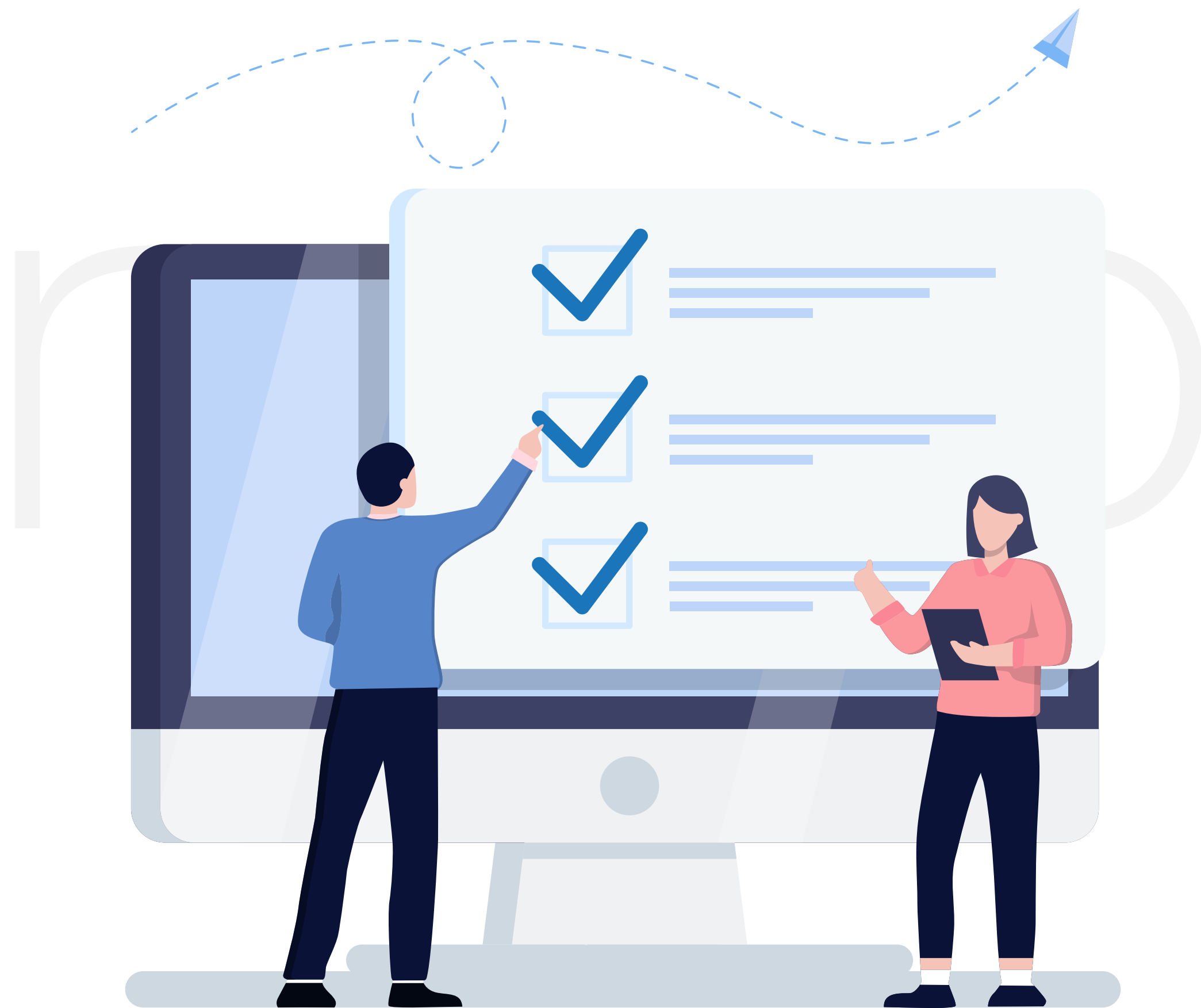
shops. Others may be flocking into non-socially distant situations. Who's who in the masses? What are their unique preferences, behaviors and values. How are they evolving? And, how do you capture their interest?

Resonate is the only consumer data and intelligence company closely tracking this real-time data on the current state of American adult consumer sentiment. We’re actively collecting and analyzing survey results to measure anxiety, behaviors, values and motivations and to help inform your decision making during this critical time.

This report is the **third wave** of Resonate's research around consumers and the COVID-19 crisis. It is fresh out of the field, and covers a variety of business-to-consumer verticals and will help to inform your business of real-time consumer sentiment.

Resonate's proprietary and vital COVID-19 research is fielded every few weeks to observe how consumer attitudes are evolving and to gather additional information in other vertical segments that will help to inform the decisions facing your business as the country reopens in the coming weeks and months.

METHODOLOGY



Resonate's COVID-19 Connected Flash Study was fielded between May 11 and May 18, 2020 to a total of 5,182 respondents. All Resonate research was fielded to U.S. respondents, as our interest is in an in-depth understanding of the U.S. consumer.

This Resonate survey was conducted as part of the larger Resonate National Consumer Study that was in field April 20 through May 22, 2020. Fielding this research as a part of our larger National Consumer Study allows us to **connect** the COVID-specific responses to the thousands of other proprietary data points collected and refreshed nightly in our consumer intelligence platform. While the early results represented in this document are unweighted, Resonate's ongoing **National Consumer Study** is balanced and weighted to represent the U.S. adult online population.

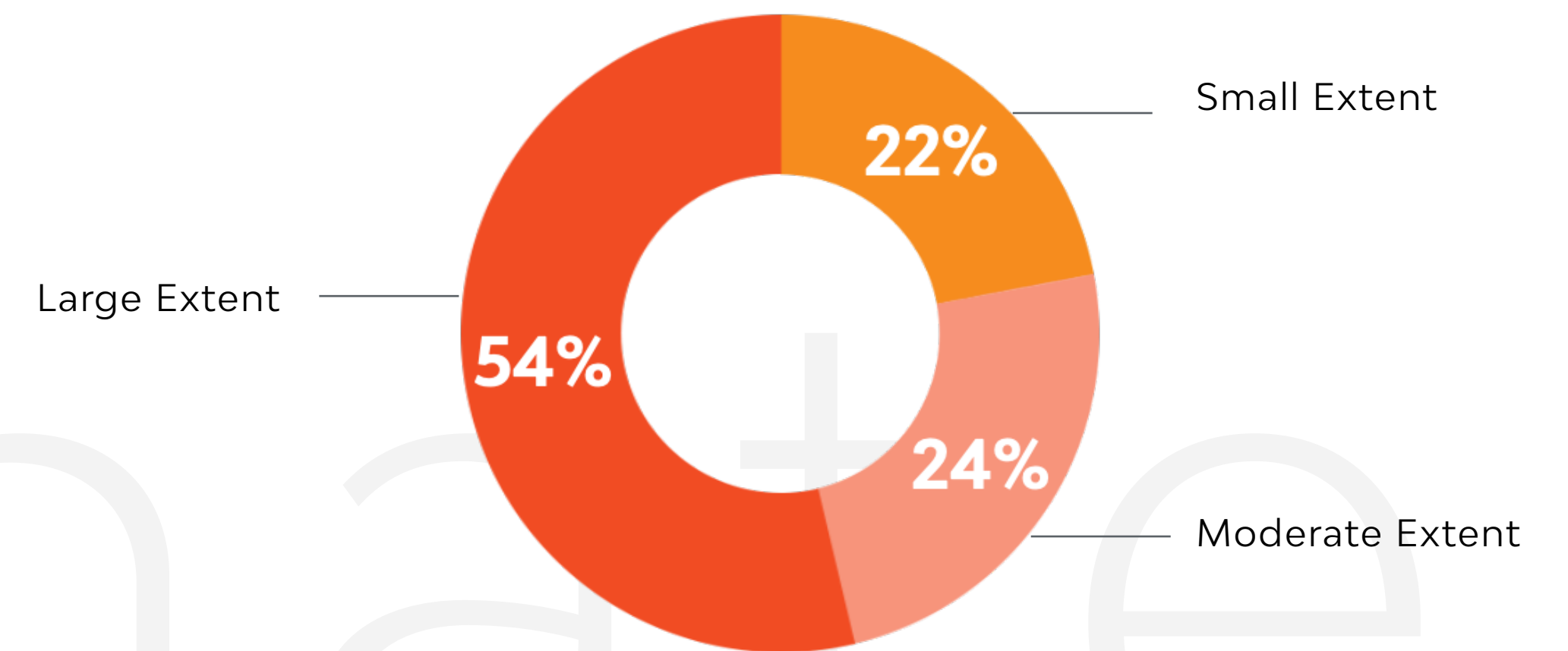
WHO'S WORRIED AND WHO'S STARTING TO RELAX?

We'll dig deeper into the numbers over the next few pages, but it appears that worry is leveling out the longer we stay at home. Those worried about the health and economic consequences of COVID-19 has decreased slightly, **9.8%** and **9.9%** respectively. However, those who anticipate a quick 2-3 month recovery has decreased **17.9%** since March.

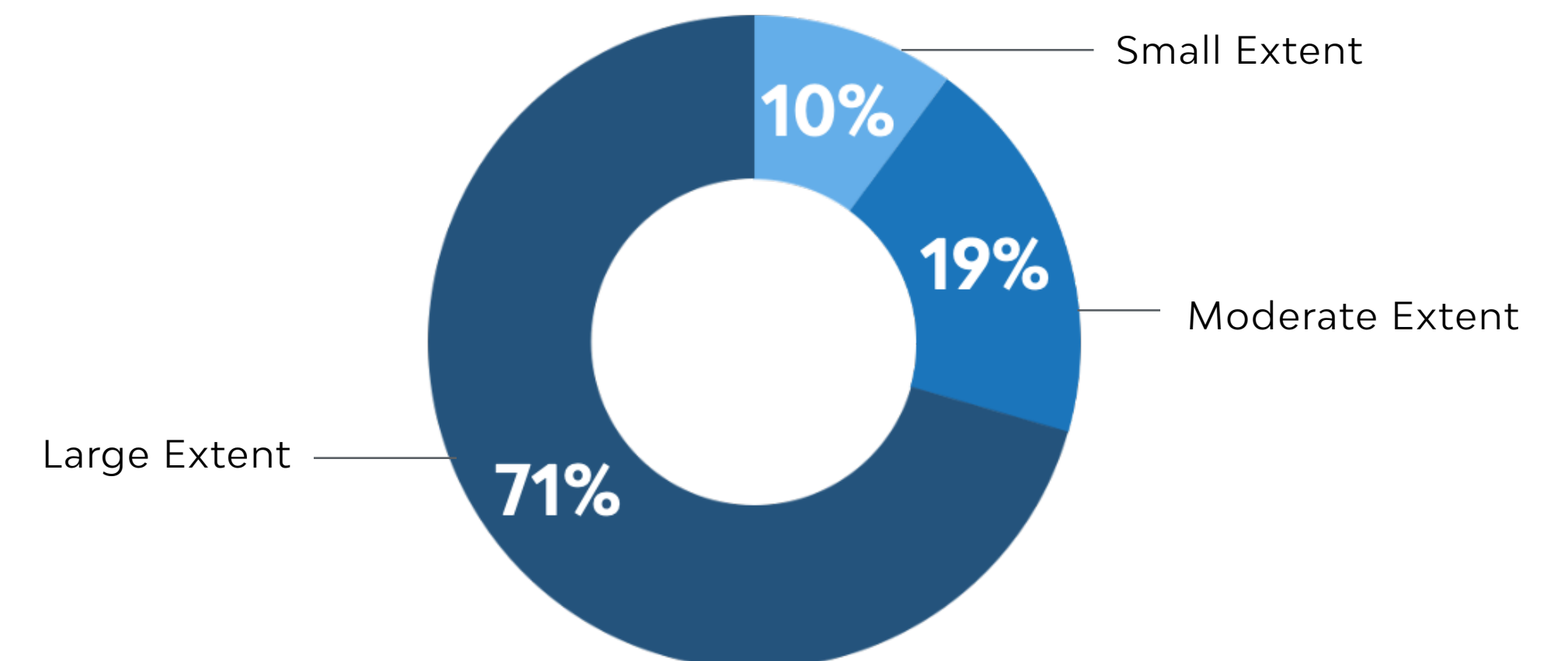
It appears that we're accepting the "new normal" is here to stay for the foreseeable future: face masks, hand sanitizer and all...or not at all.



WORRIED ABOUT HEALTH

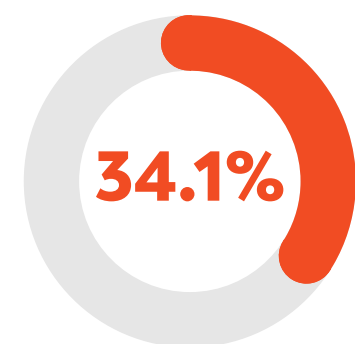


WORRIED ABOUT FINANCES



QUESTIONS

Q1-3: SENTIMENT



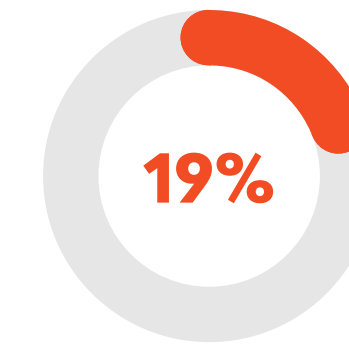
34.1% believe life will return to normal in 4-6 months

Q14-32: TRAVEL & TRANSPORTATION



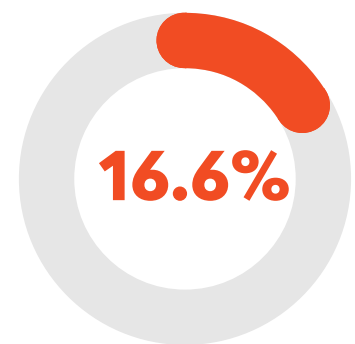
31.3% would feel safe staying at a major hotel chain

Q39-42: RETAIL



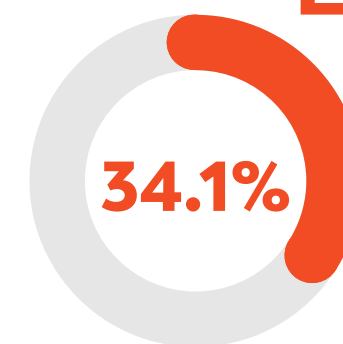
19% are increasing their visits to a grocery store or pharmacy

Q4-5: CURRENT STATE



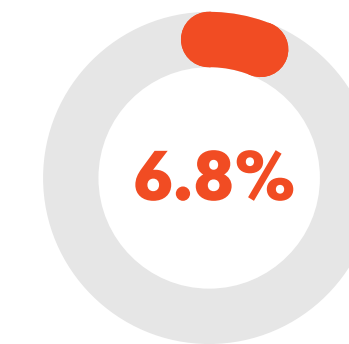
16.6% fewer consumers are under stay-at-home orders than in April

Q33-34: SPORTS & ENTERTAINMENT



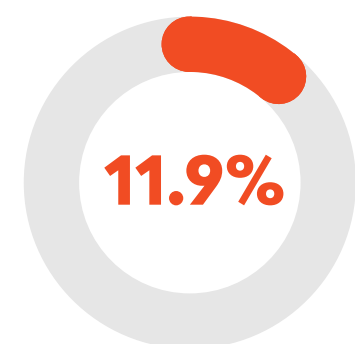
34.1% will be more engaged than before with live sports when they return

Q43-47: POLITICS



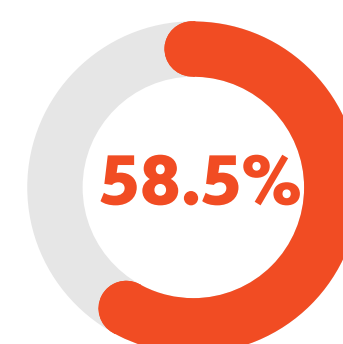
6.8% more people say their trust of federal government has decreased to a large extent

Q6-13: GATHERING



11.9% will feel safe going to events with thousands of people

Q35-38: MEDIA

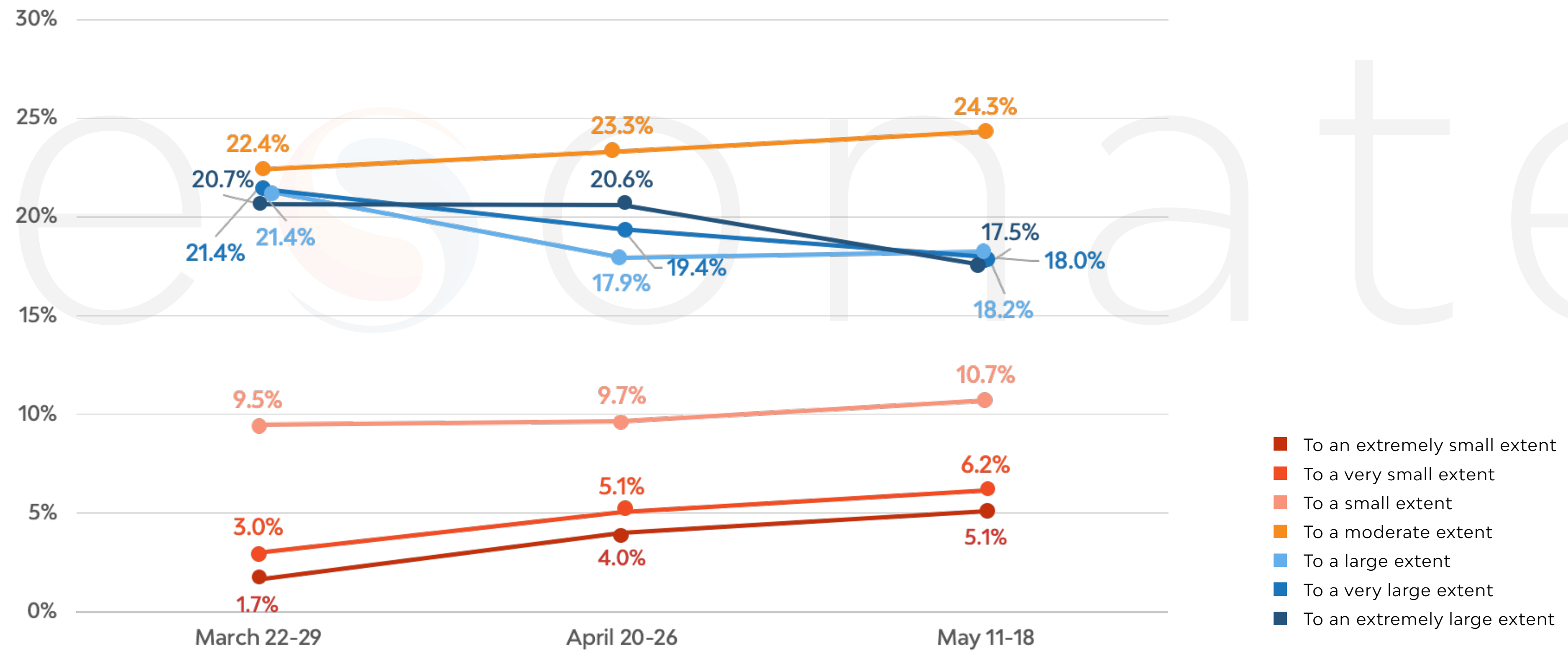


58.5% have increased their consumption of streaming TV



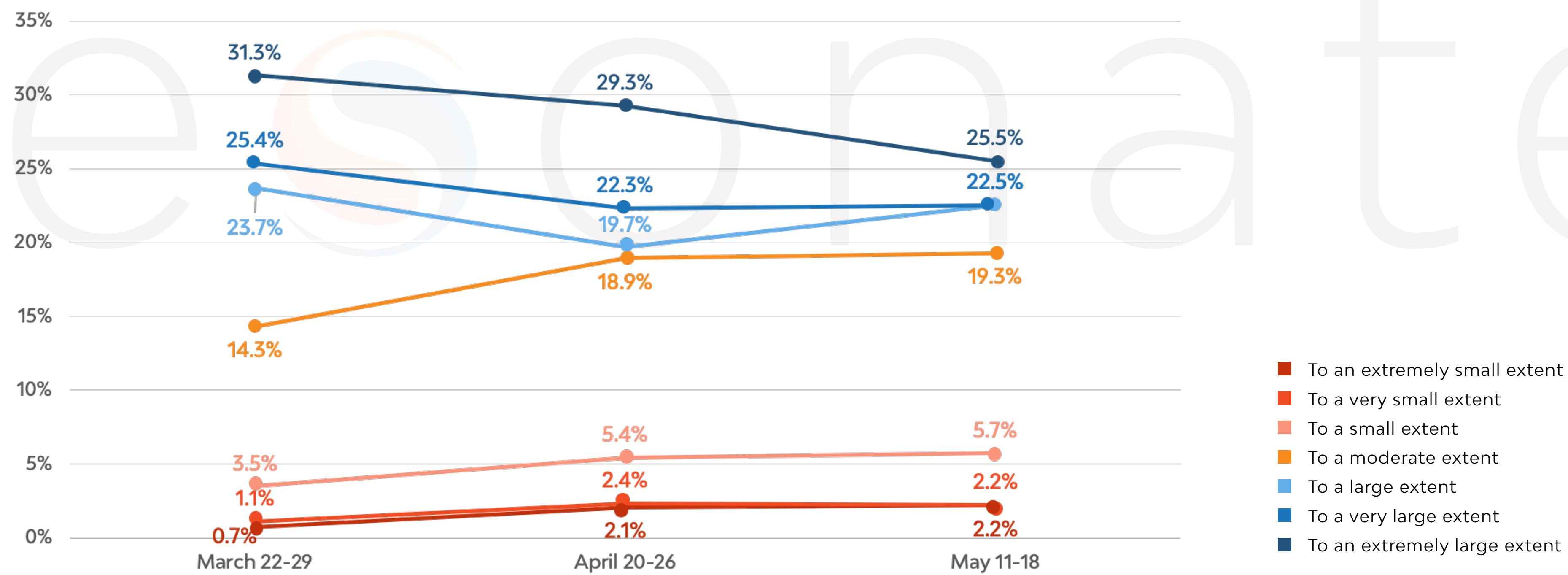
SENTIMENT

Q1 Overall, to what extent are you concerned about the health-related consequences of the coronavirus situation?



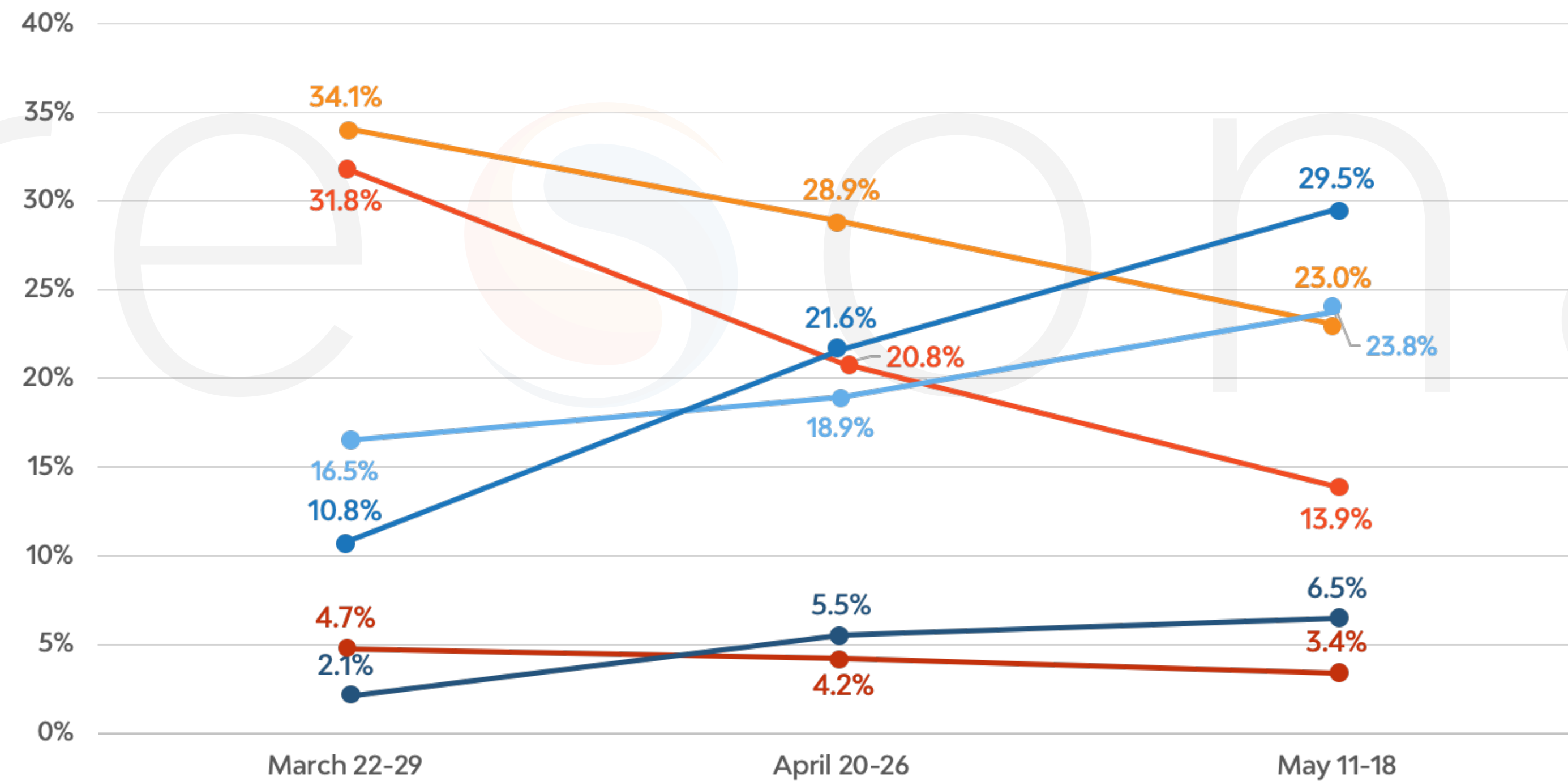
SENTIMENT

Q2 Overall, to what extent are you concerned about the economic-related consequences of the coronavirus situation?



SENTIMENT

Q3a Thinking about the coronavirus situation, how soon do you believe that your life will largely return to "normal"?

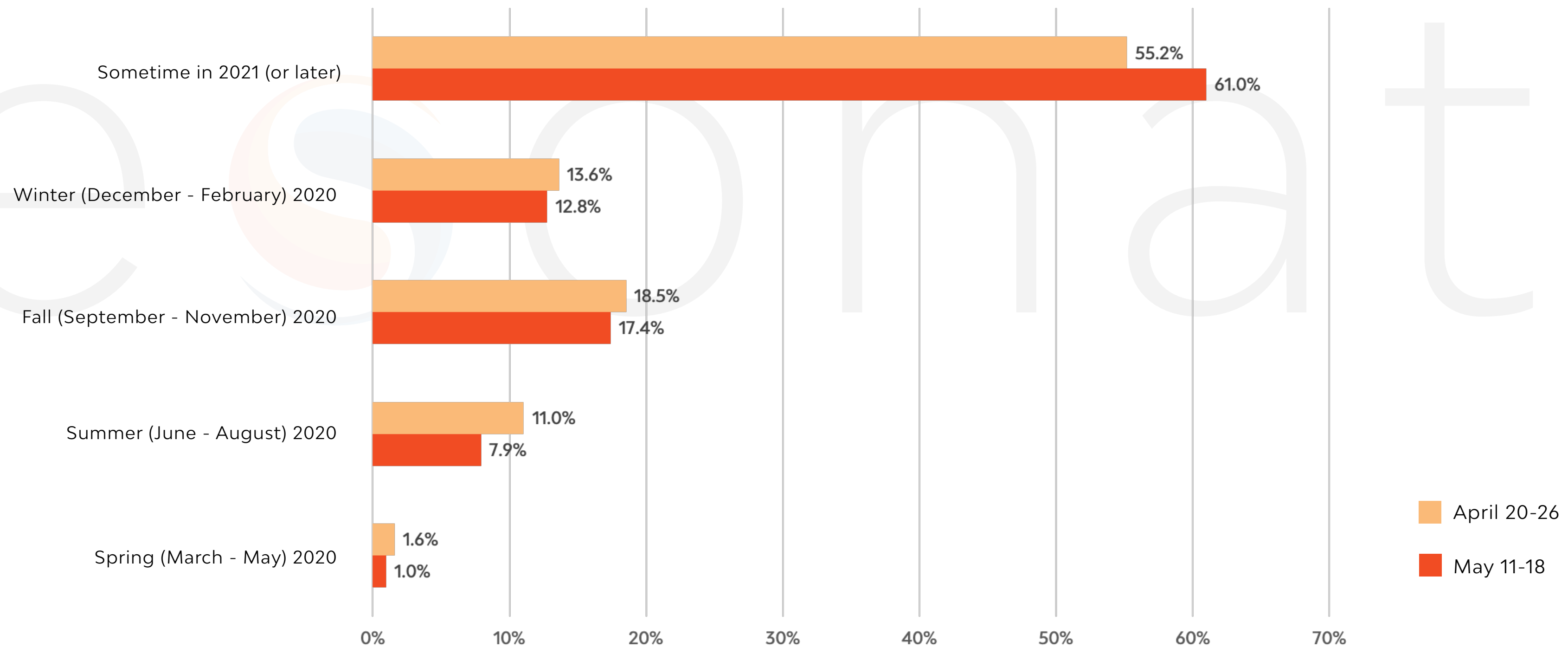


18.7%

18.7% increase March to May:
over a year to get back to
normal

SENTIMENT

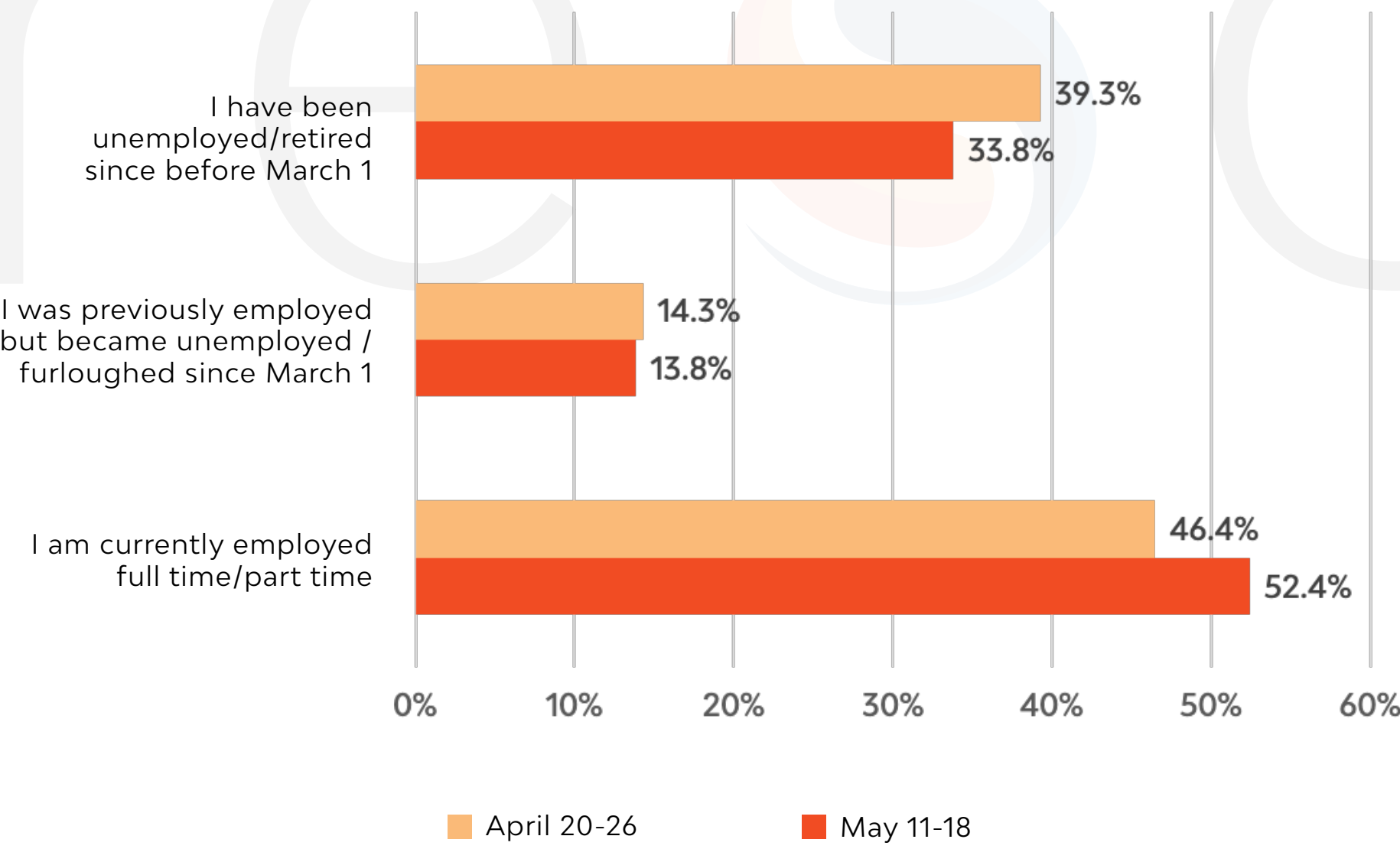
Q3b When do you believe the United State's economy will return to "normal," as it was before the coronavirus situation began?



CURRENT STATE

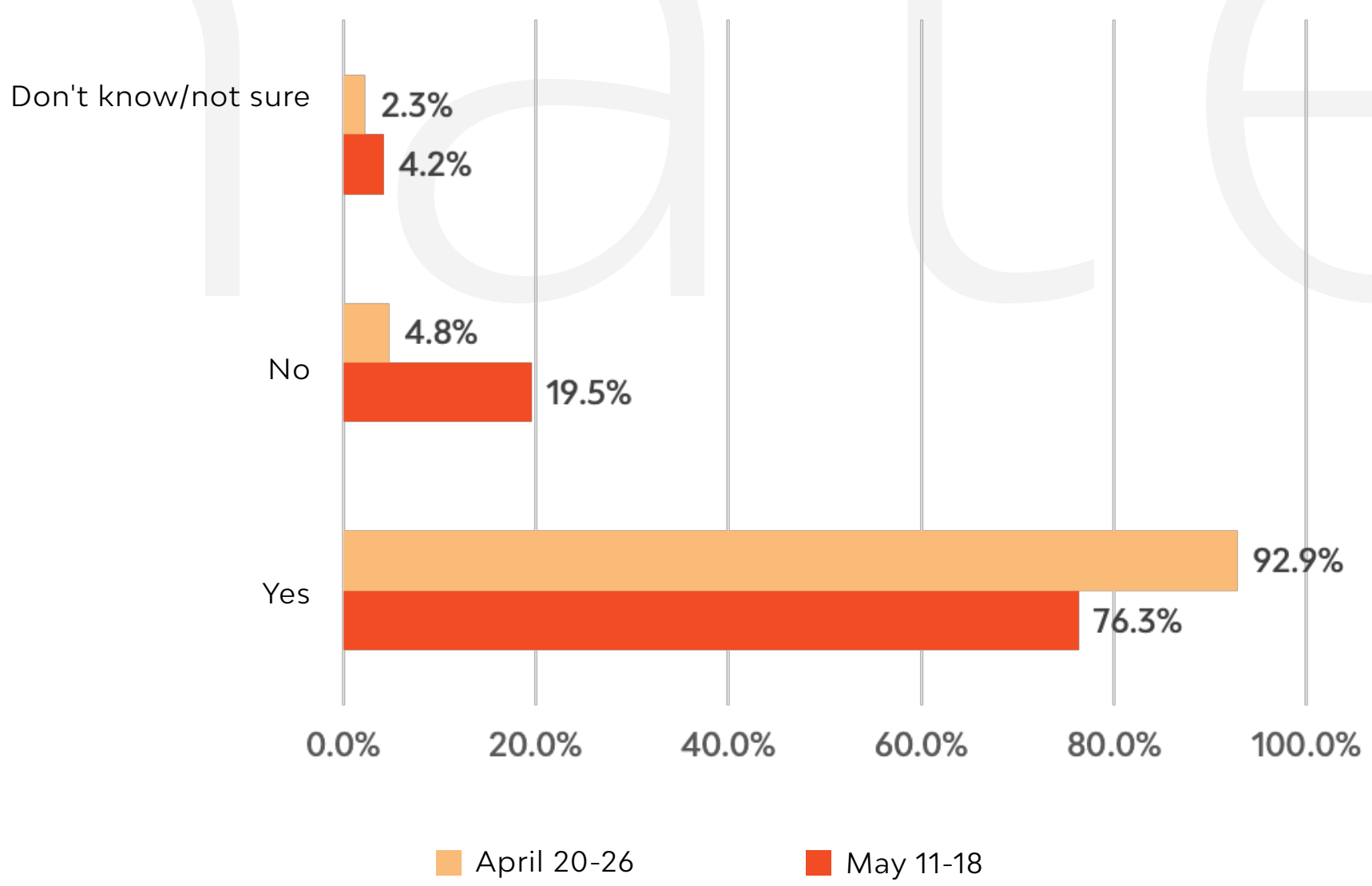
Q4

Which of the following best describes your work situation?



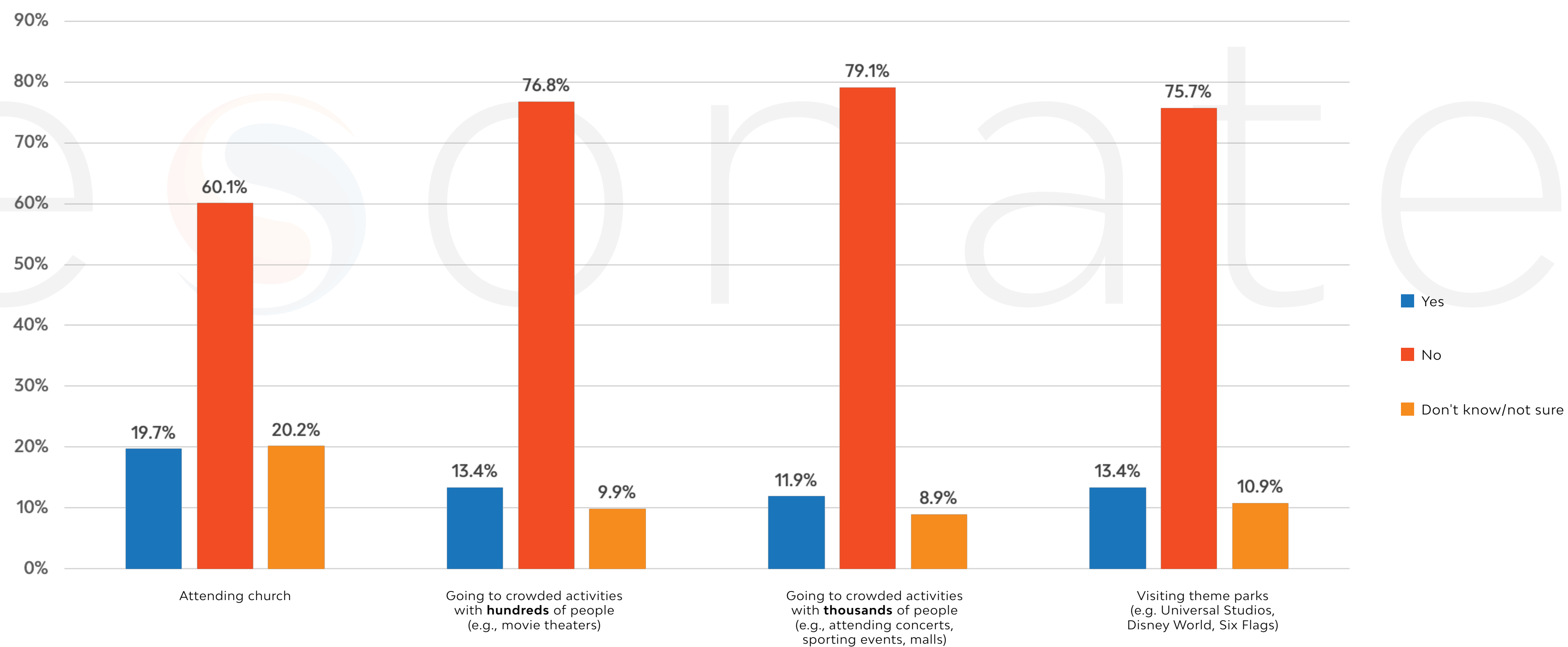
Q5

Does your state currently have a “stay home” or “shelter in place” order? The mandates differ state by state but generally require people to avoid all nonessential outings and stay inside as much as possible.

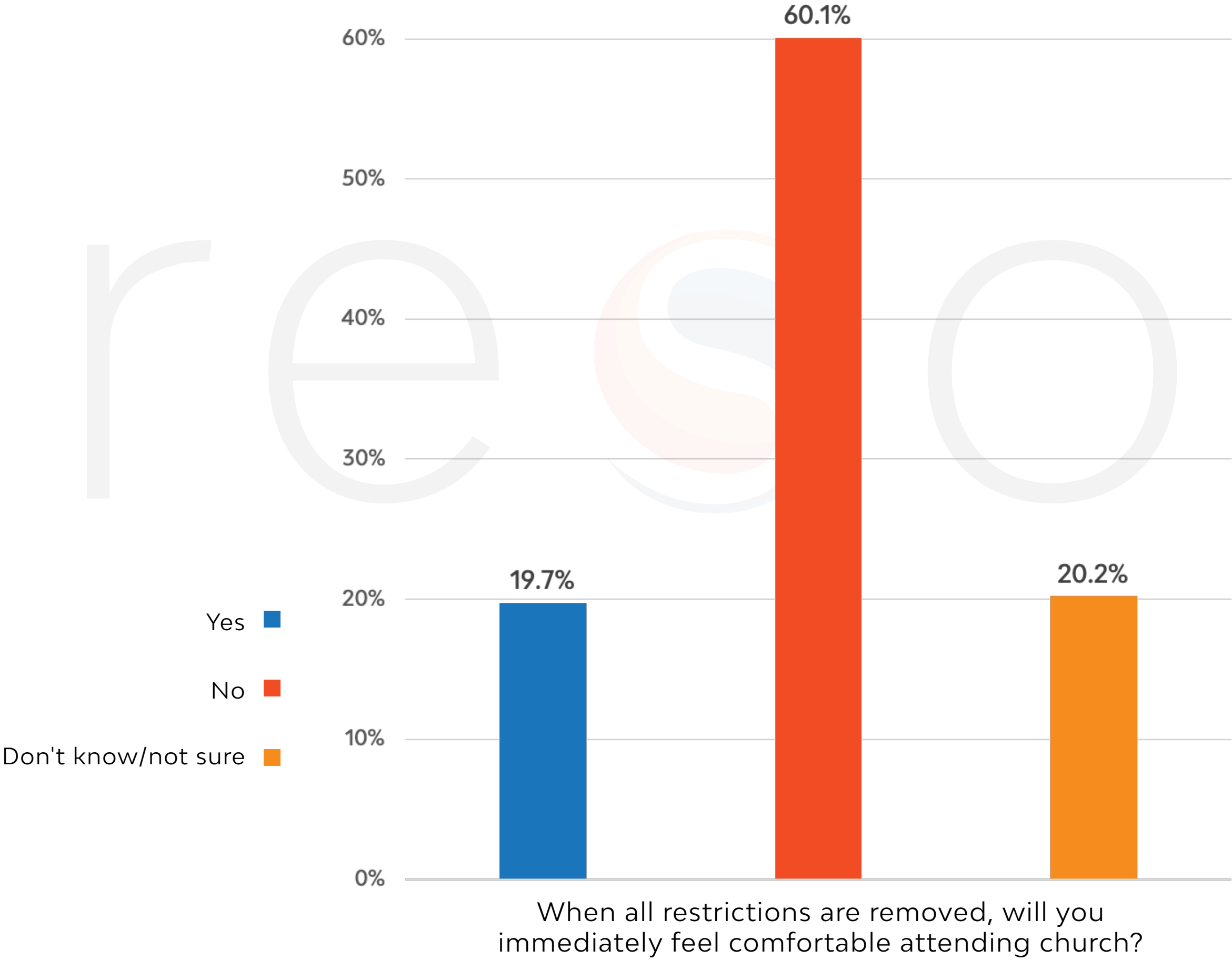


GATHERING

Q6-Q9 When all the restrictions in your state are removed, will you immediately feel safe...?



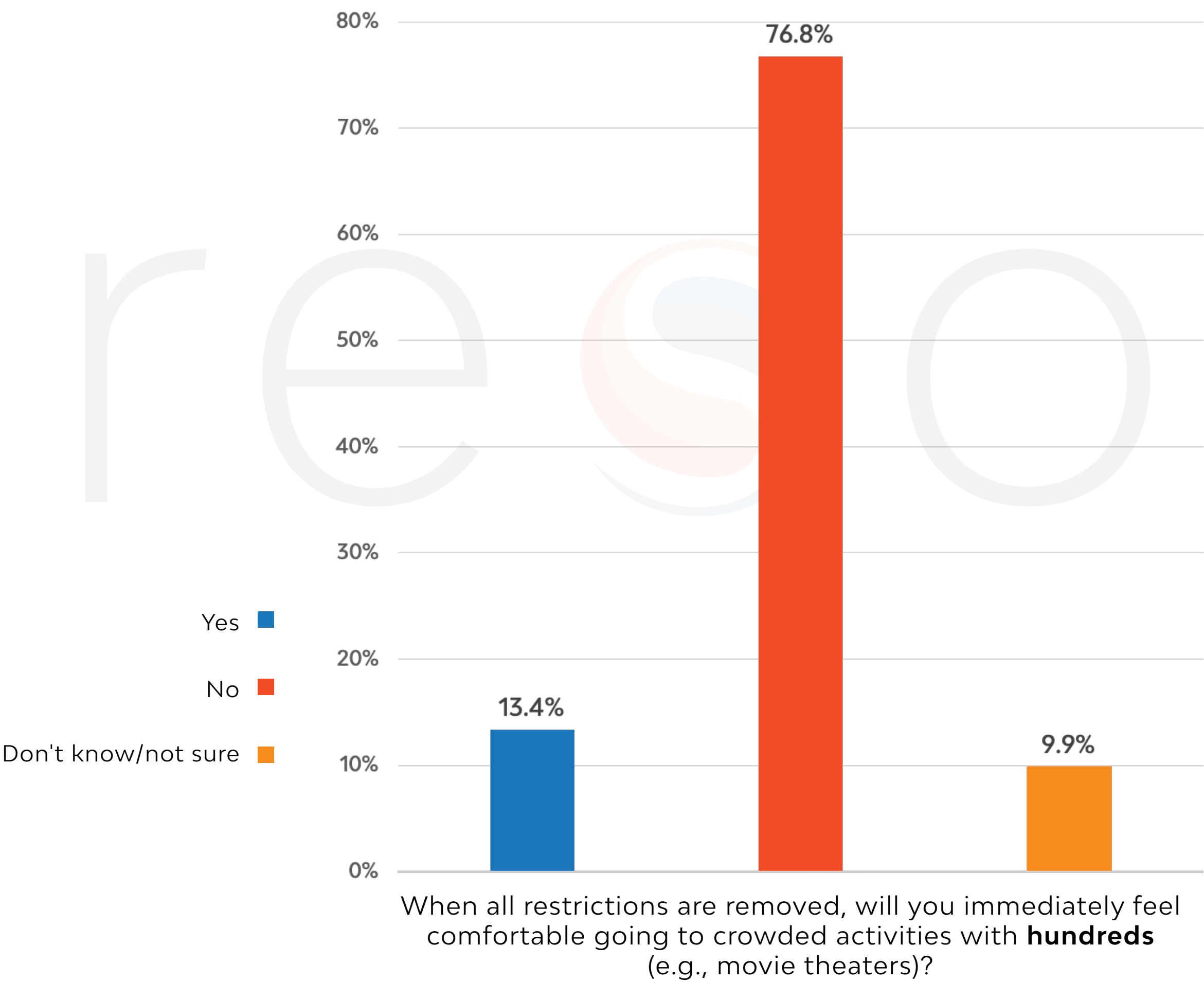
GATHERING



Q10 What would be REQUIRED for you to feel comfortable...?
Please select all that apply.

Once I see/hear about others going	6.0%
When the rate of deaths/infections significantly decrease	36.5%
When a vaccine becomes widely available	41.7%
Forced social distancing	26.7%
Everyone wearing masks/gloves	28.8%
Never	9.8%
Don't know/not sure	9.8%

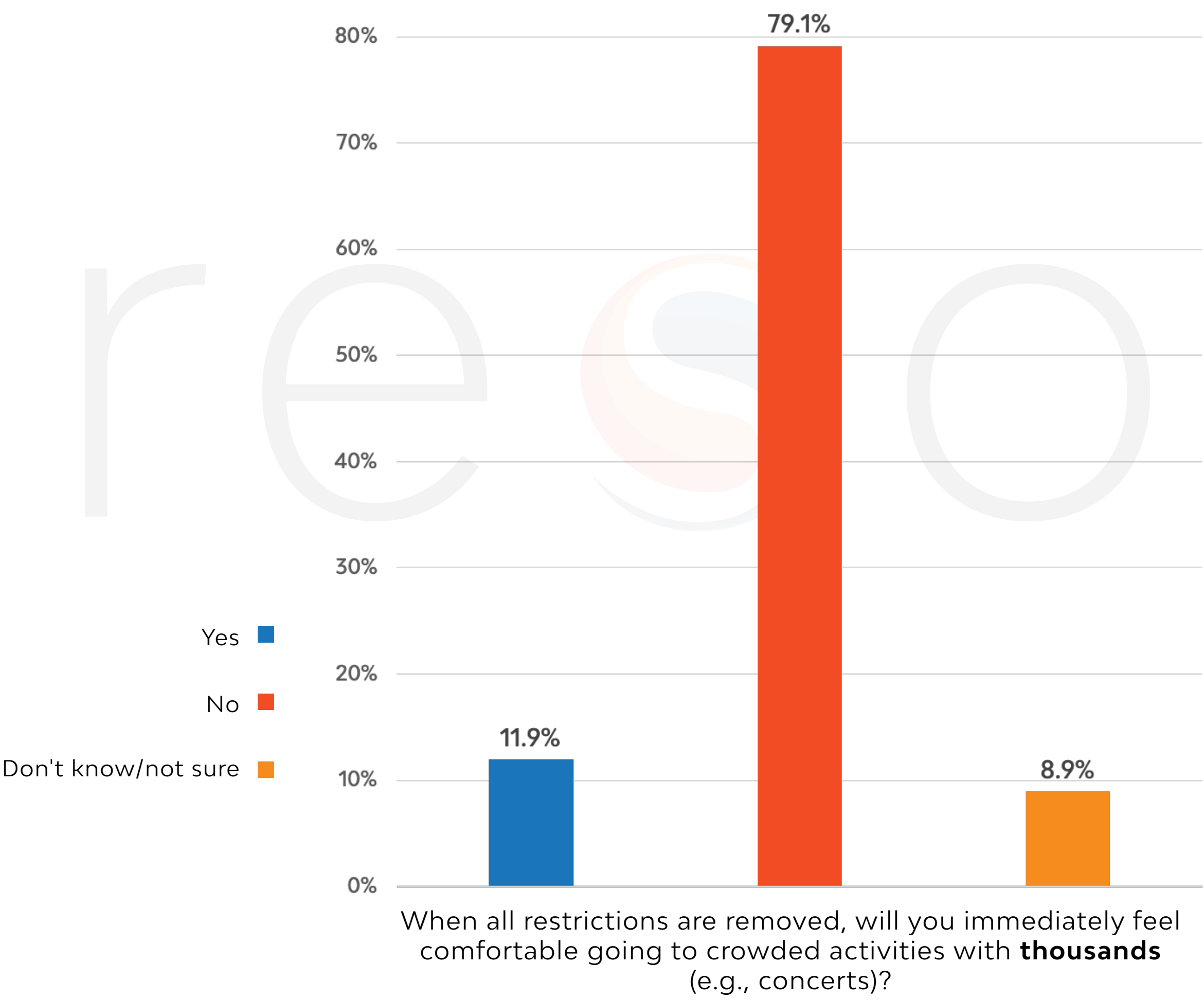
GATHERING



Q11 What would be REQUIRED for you to feel comfortable...?
Please select all that apply.

Once I see/hear about others going	7.2%
When the rate of deaths/infections significantly decrease	43.2%
When a vaccine becomes widely available	52.1%
Forced social distancing	29.8%
Everyone wearing masks/gloves	29.8%
Never	5.0%
Don't know/not sure	8.2%

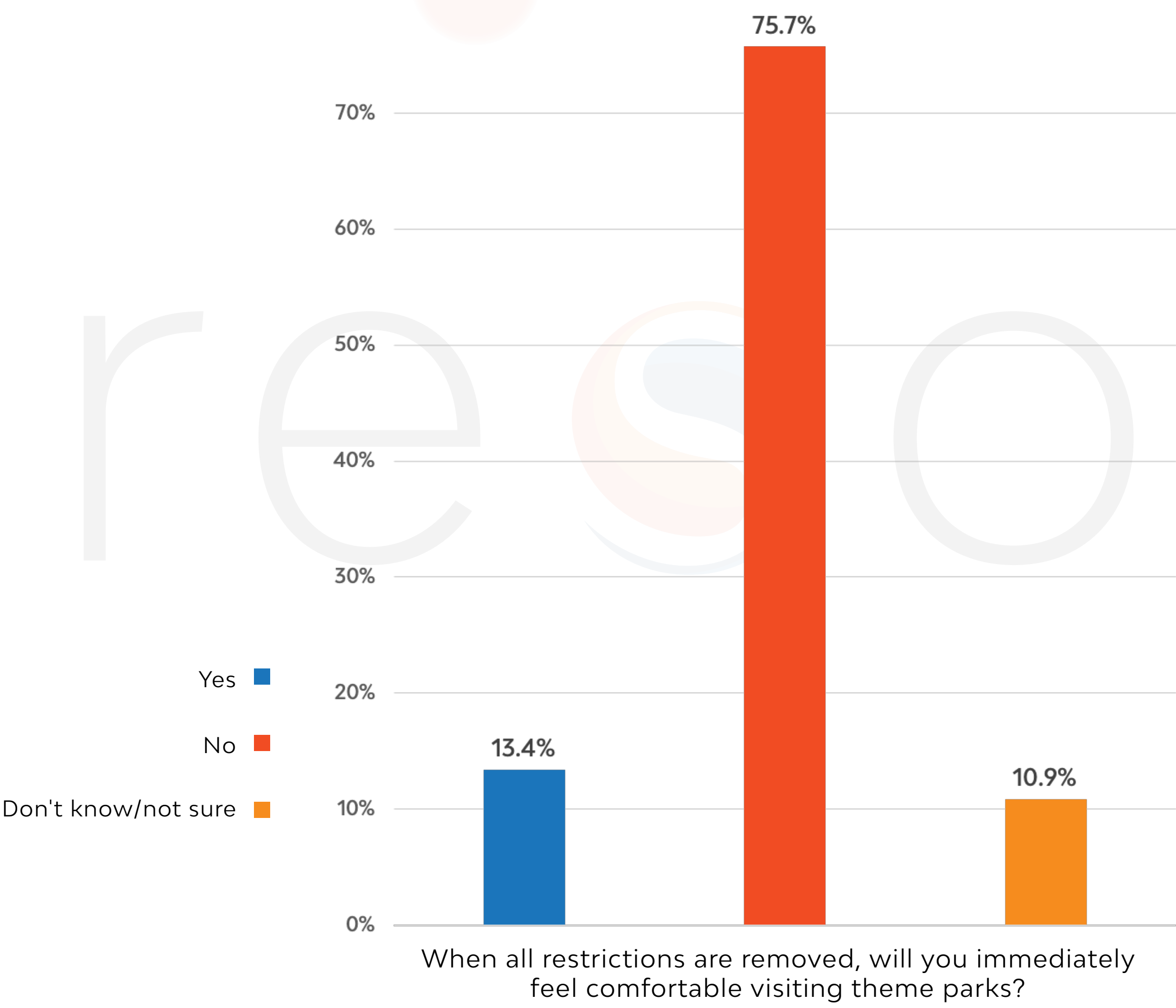
GATHERING



Q12 What would be REQUIRED for you to feel comfortable...?
Please select all that apply.

Once I see/hear about others going	7.0%
When the rate of deaths/infections significantly decrease	41.1%
When a vaccine becomes widely available	52.1%
Forced social distancing	24.6%
Everyone wearing masks/gloves	26.3%
Never	7.5%
Don't know/not sure	10.1%

GATHERING

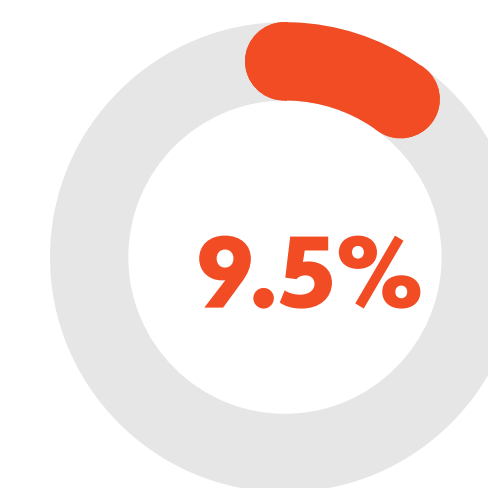
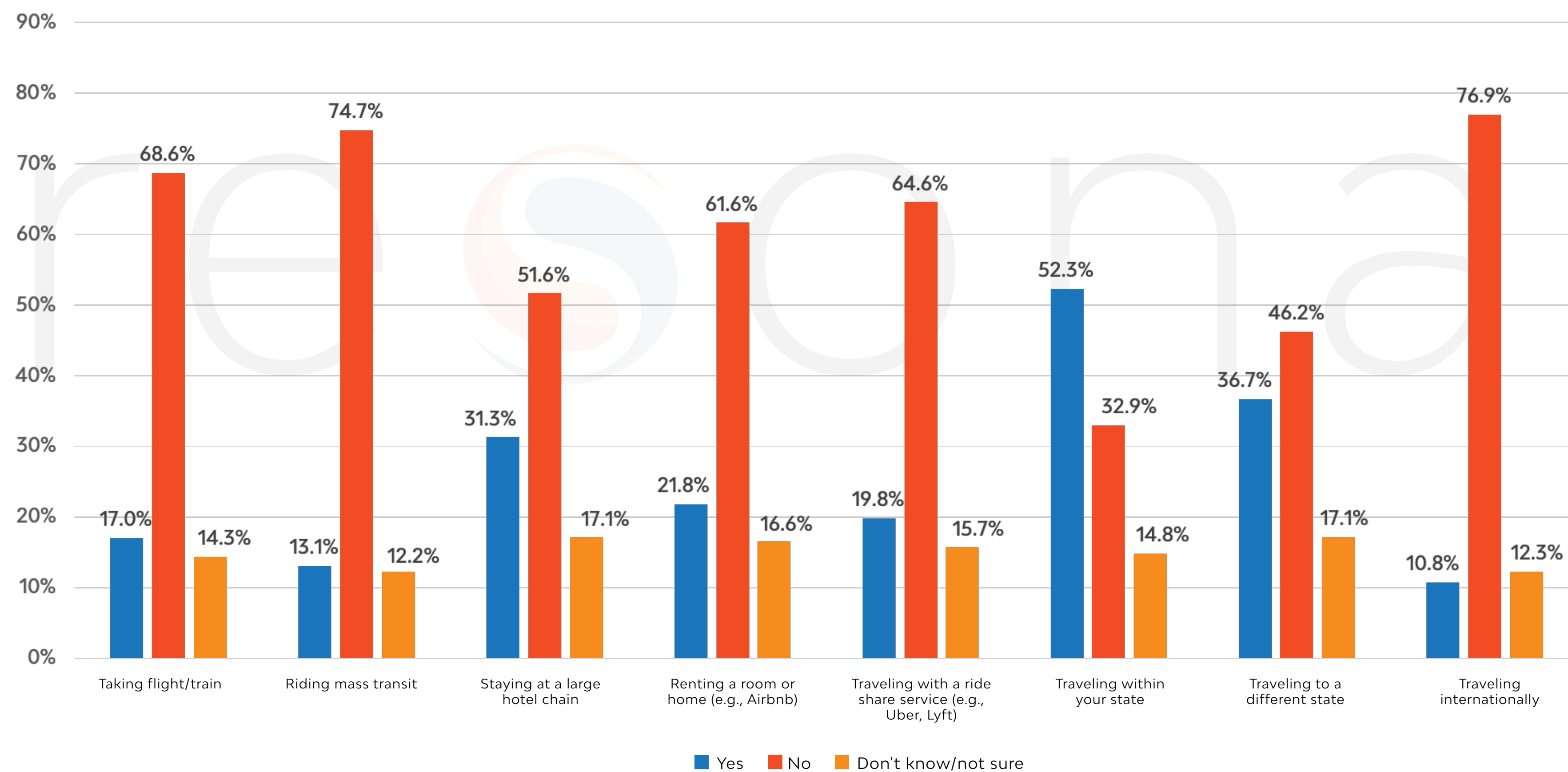


Q13 What would be REQUIRED for you to feel comfortable...?
Please select all that apply.

Once I see/hear about others going	7.3%
When the rate of deaths/infections significantly decrease	38.2%
When a vaccine becomes widely available	48.8%
Forced social distancing	22.8%
Everyone wearing masks/gloves	23.6%
Never	9.1%
Don't know/not sure	11.2%

TRAVEL & TRANSPORTATION

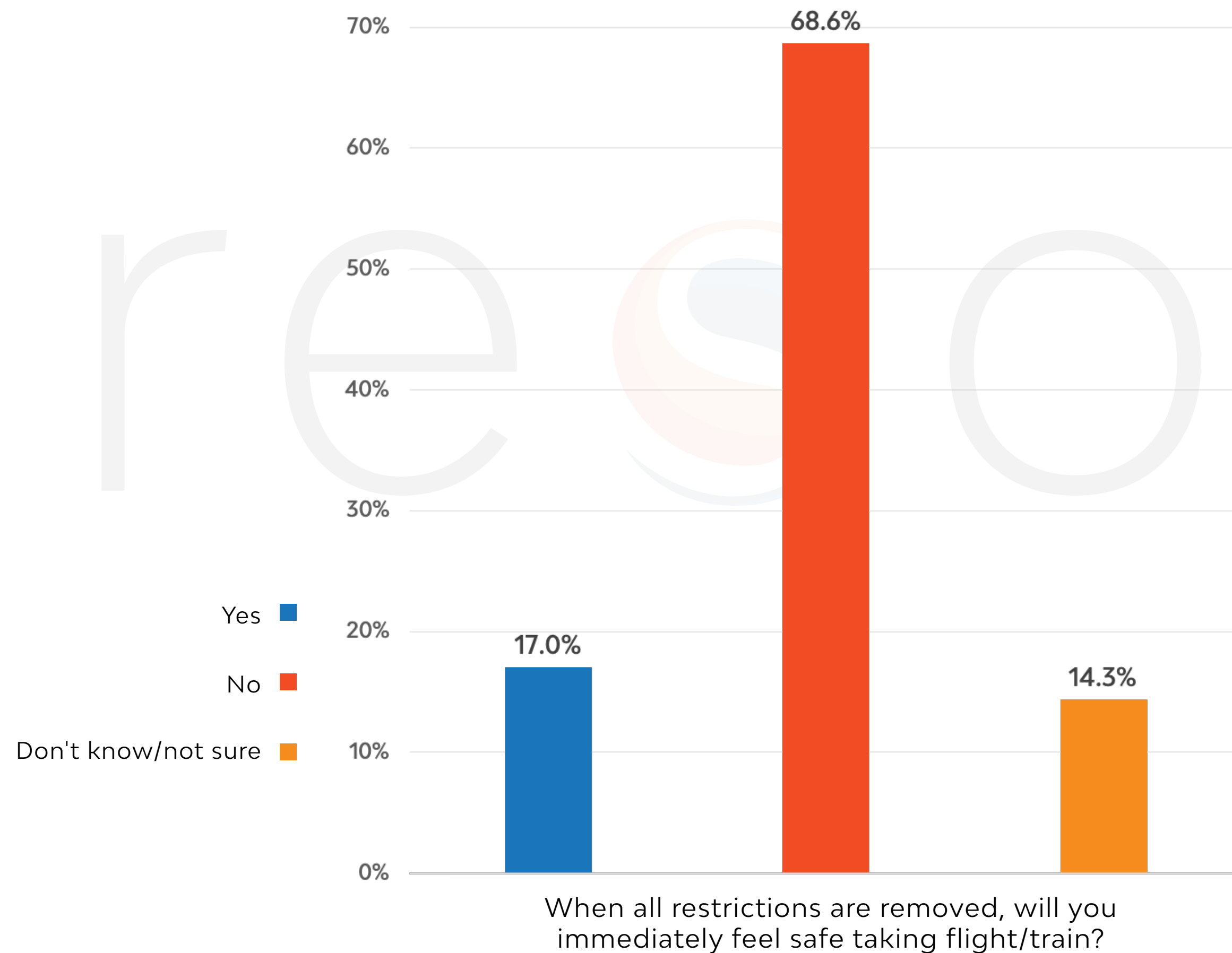
Q14-Q21 When all the restrictions in your state are removed, will you immediately feel safe...?



9.5% would feel more comfortable **booking a large hotel chain** than a rental home

More people would feel comfortable **taking a flight** or a **train** than mass transit

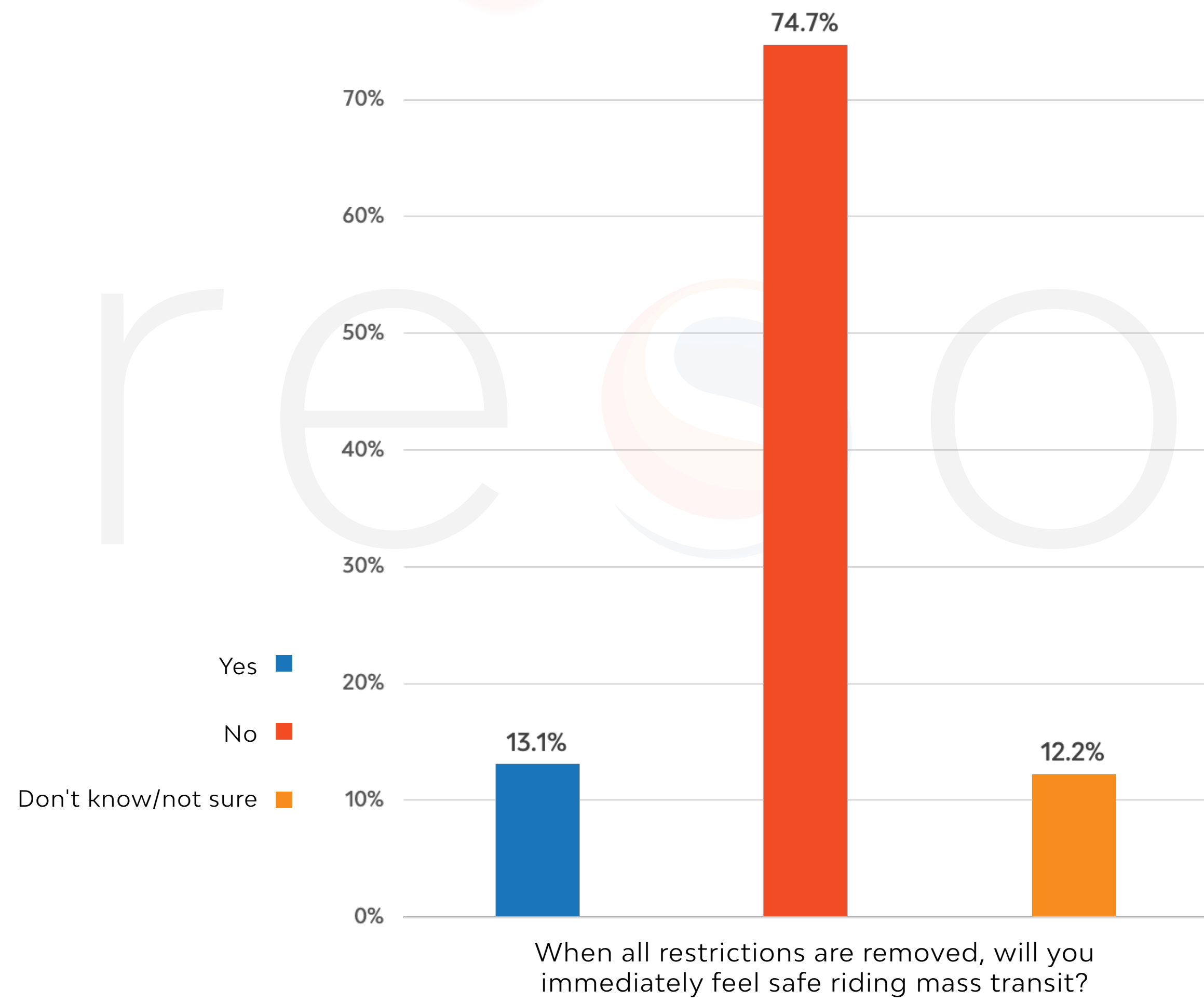
TRAVEL & TRANSPORTATION



Q22 What would be REQUIRED for you to feel comfortable...?
Please select all that apply.

Once I see/hear about others going	7.3%
When the rate of deaths/infections significantly decrease	39.0%
When a vaccine becomes widely available	45.8%
Forced social distancing	27.0%
Everyone wearing masks/gloves	31.5%
Never	6.4%
Don't know/not sure	10.1%

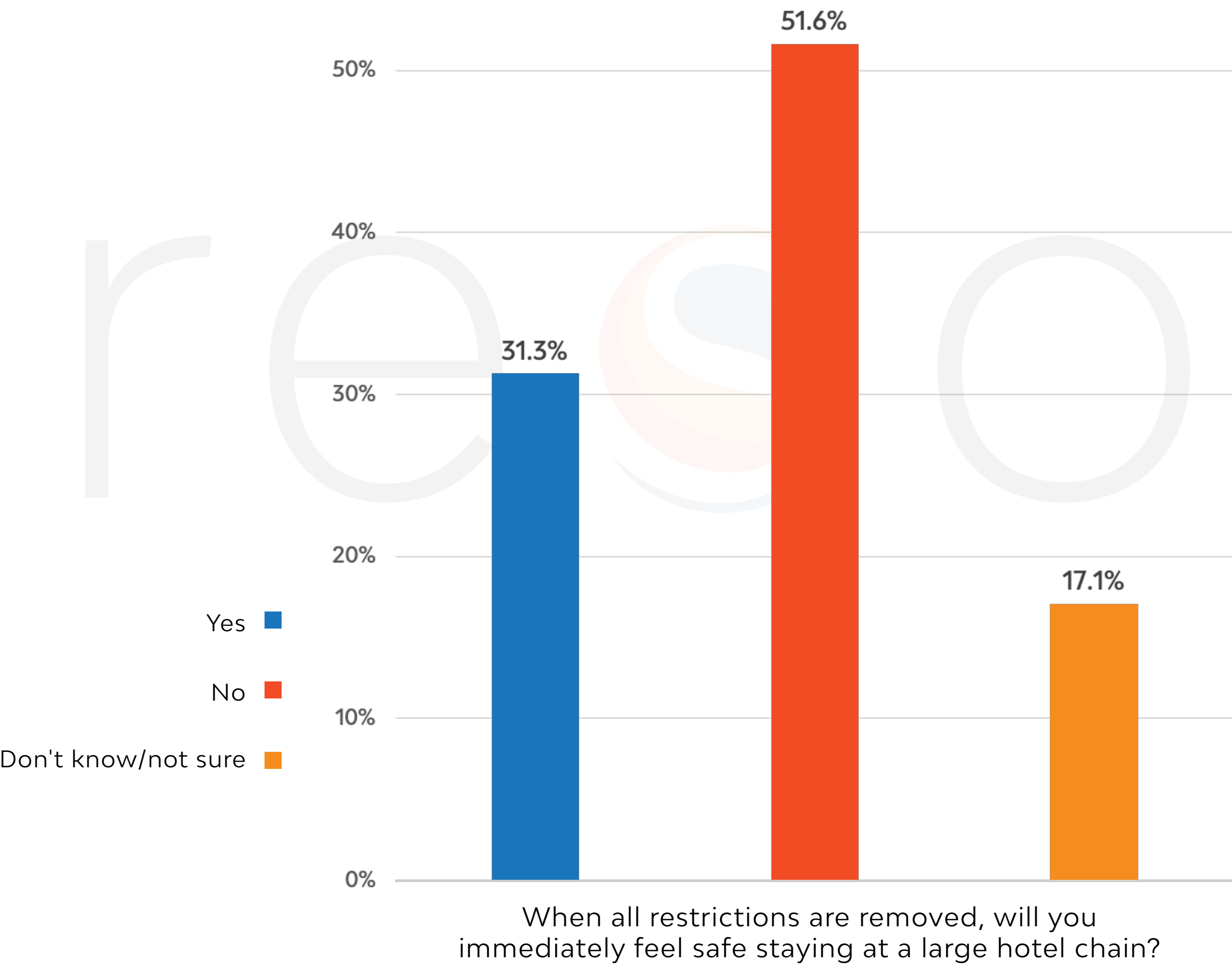
TRAVEL & TRANSPORTATION



Q23 What would be REQUIRED for you to feel comfortable...?
Please select all that apply.

Once I see/hear about others going	6.4%
When the rate of deaths/infections significantly decrease	36.3%
When a vaccine becomes widely available	43.6%
Forced social distancing	25.1%
Everyone wearing masks/gloves	29.7%
Never	11.7%
Don't know/not sure	11.7%

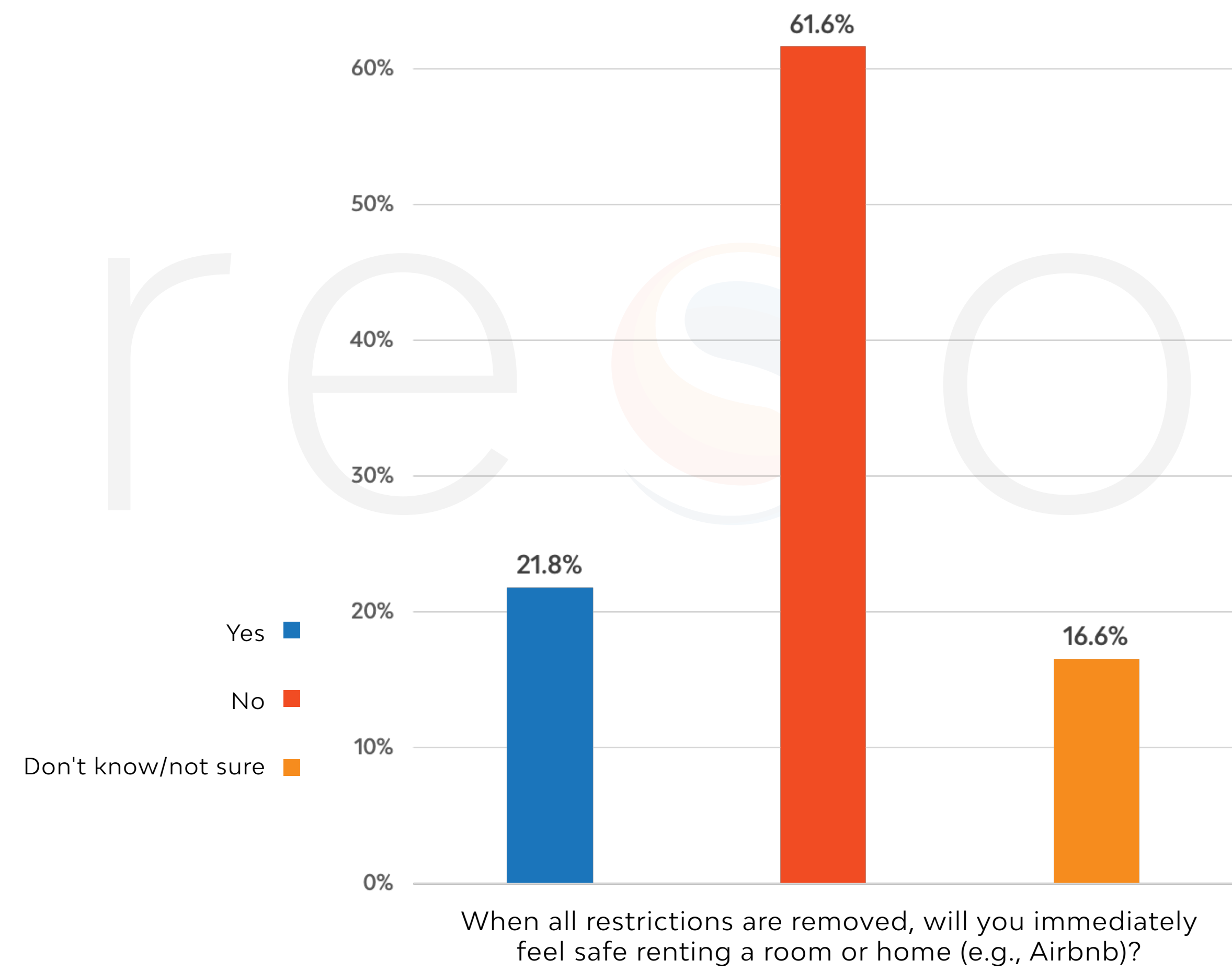
TRAVEL & TRANSPORTATION



Q24 What would be REQUIRED for you to feel comfortable...?
Please select all that apply.

Once I see/hear about others going	6.5%
When the rate of deaths/infections significantly decrease	32.9%
When a vaccine becomes widely available	37.6%
Forced social distancing	19.2%
Everyone wearing masks/gloves	21.7%
Never	4.3%
Don't know/not sure	10.2%

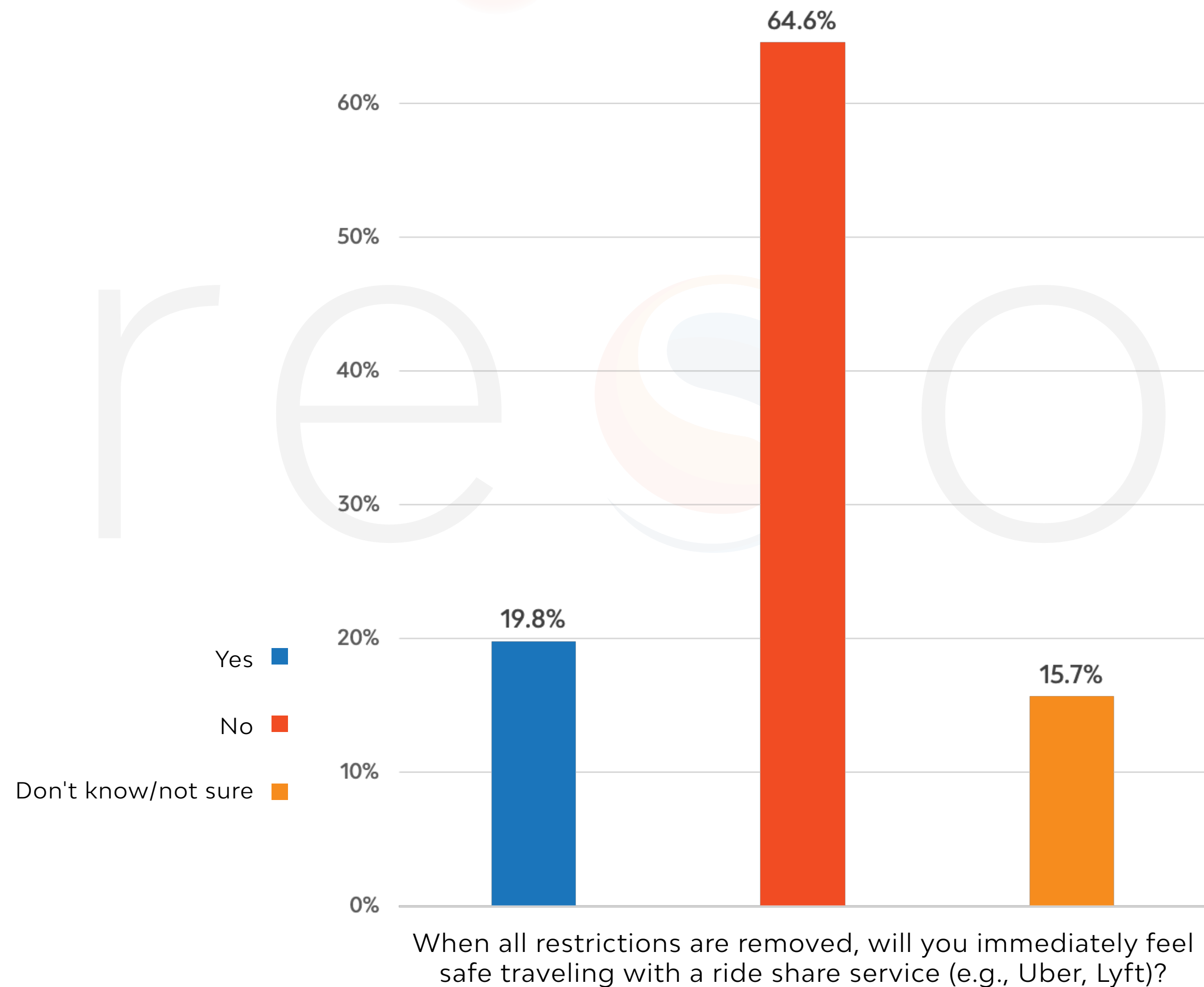
TRAVEL & TRANSPORTATION



Q25 What would be REQUIRED for you to feel comfortable...?
Please select all that apply.

Once I see/hear about others going	6.1%
When the rate of deaths/infections significantly decrease	28.4%
When a vaccine becomes widely available	34.6%
Forced social distancing	13.6%
Everyone wearing masks/gloves	15.0%
Never	14.8%
Don't know/not sure	14.2%

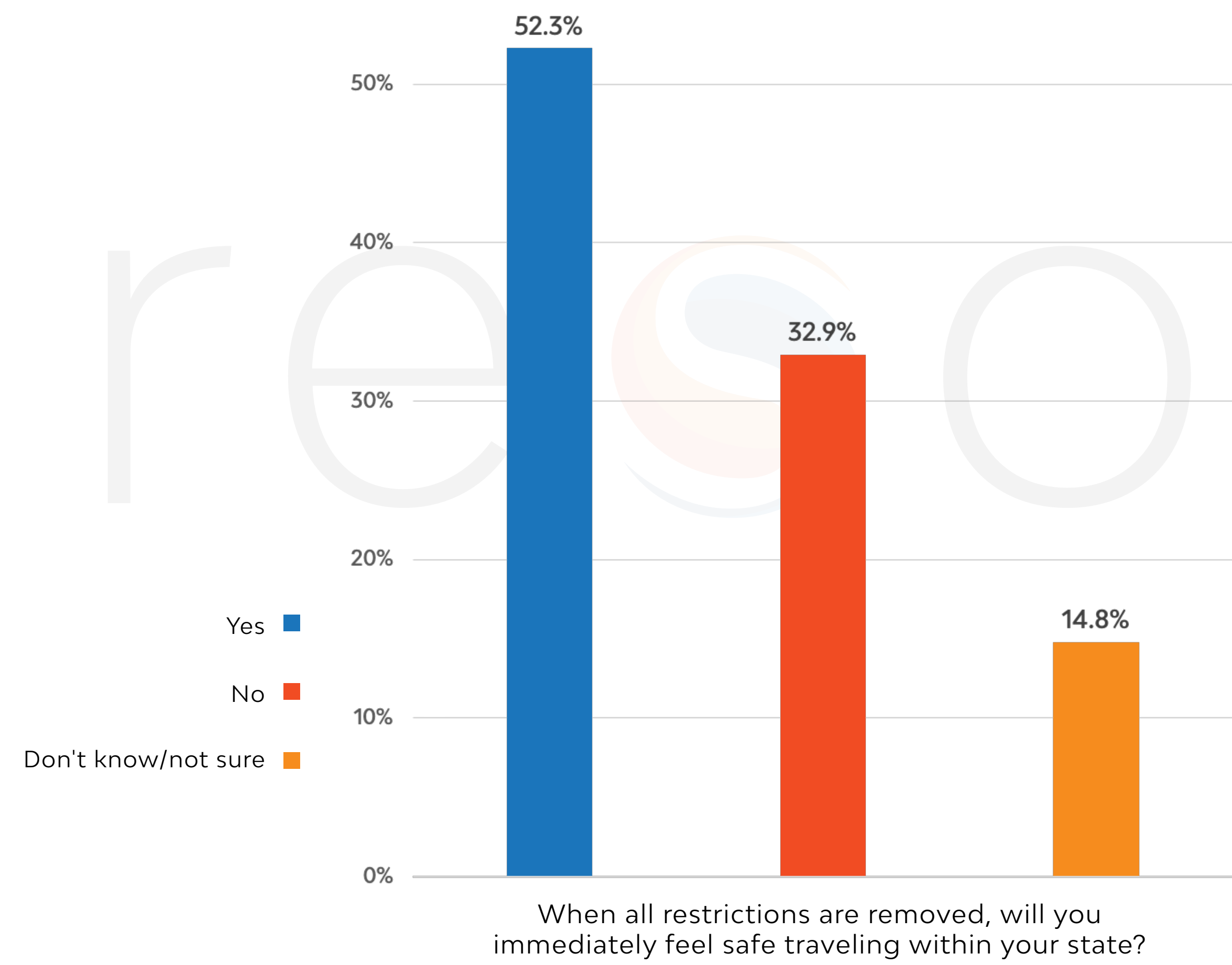
TRAVEL & TRANSPORTATION



Q26 What would be REQUIRED for you to feel comfortable...?
Please select all that apply.

Once I see/hear about others going	5.2%
When the rate of deaths/infections significantly decrease	29.2%
When a vaccine becomes widely available	34.7%
Forced social distancing	13.4%
Everyone wearing masks/gloves	23.4%
Never	15.3%
Don't know/not sure	13.1%

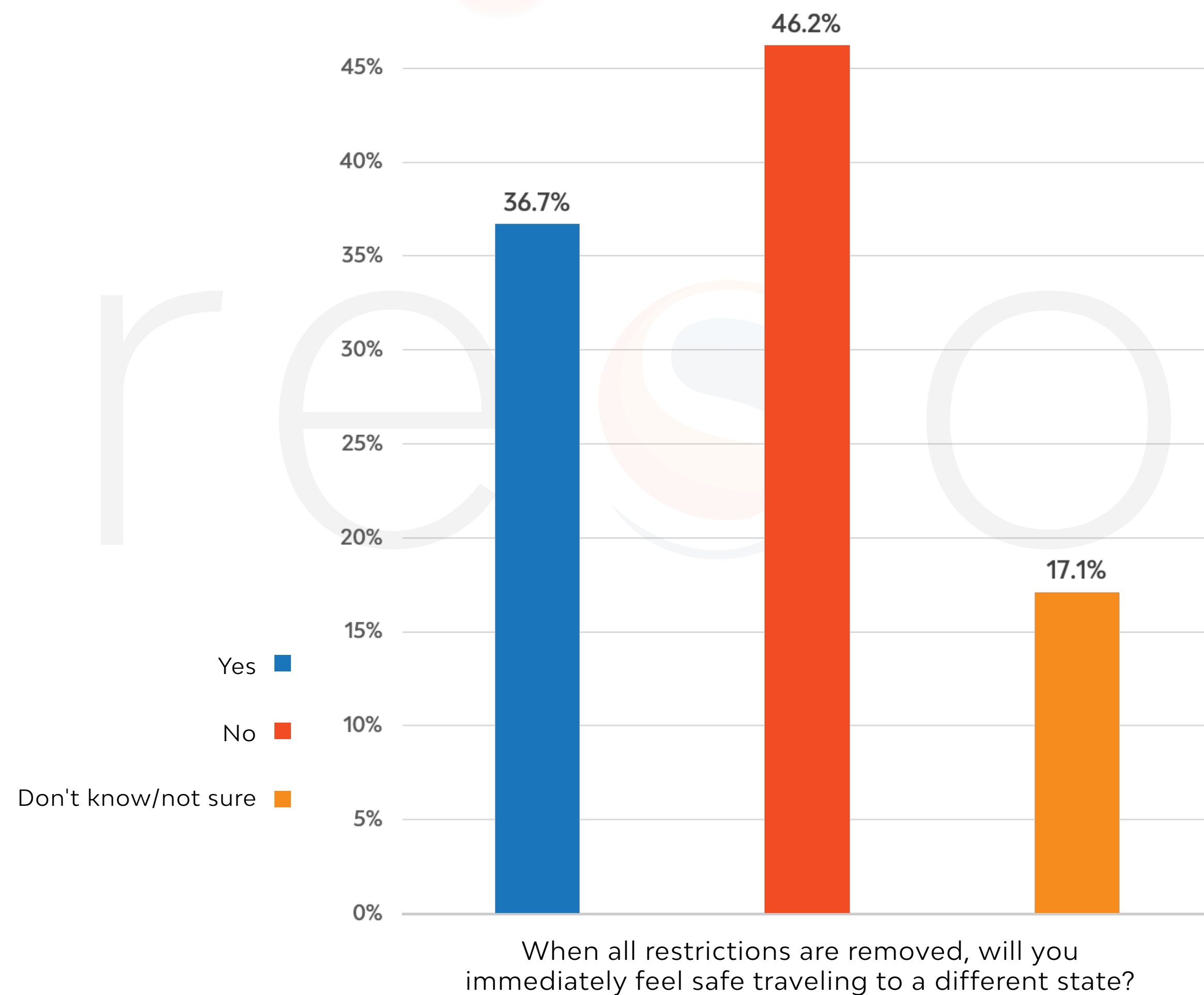
TRAVEL & TRANSPORTATION



Q27 What would be REQUIRED for you to feel comfortable...?
Please select all that apply.

Once I see/hear about others going	4.3%
When the rate of deaths/infections significantly decrease	25.4%
When a vaccine becomes widely available	27.2%
Forced social distancing	17.0%
Everyone wearing masks/gloves	17.4%
Never	1.7%
Don't know/not sure	5.7%

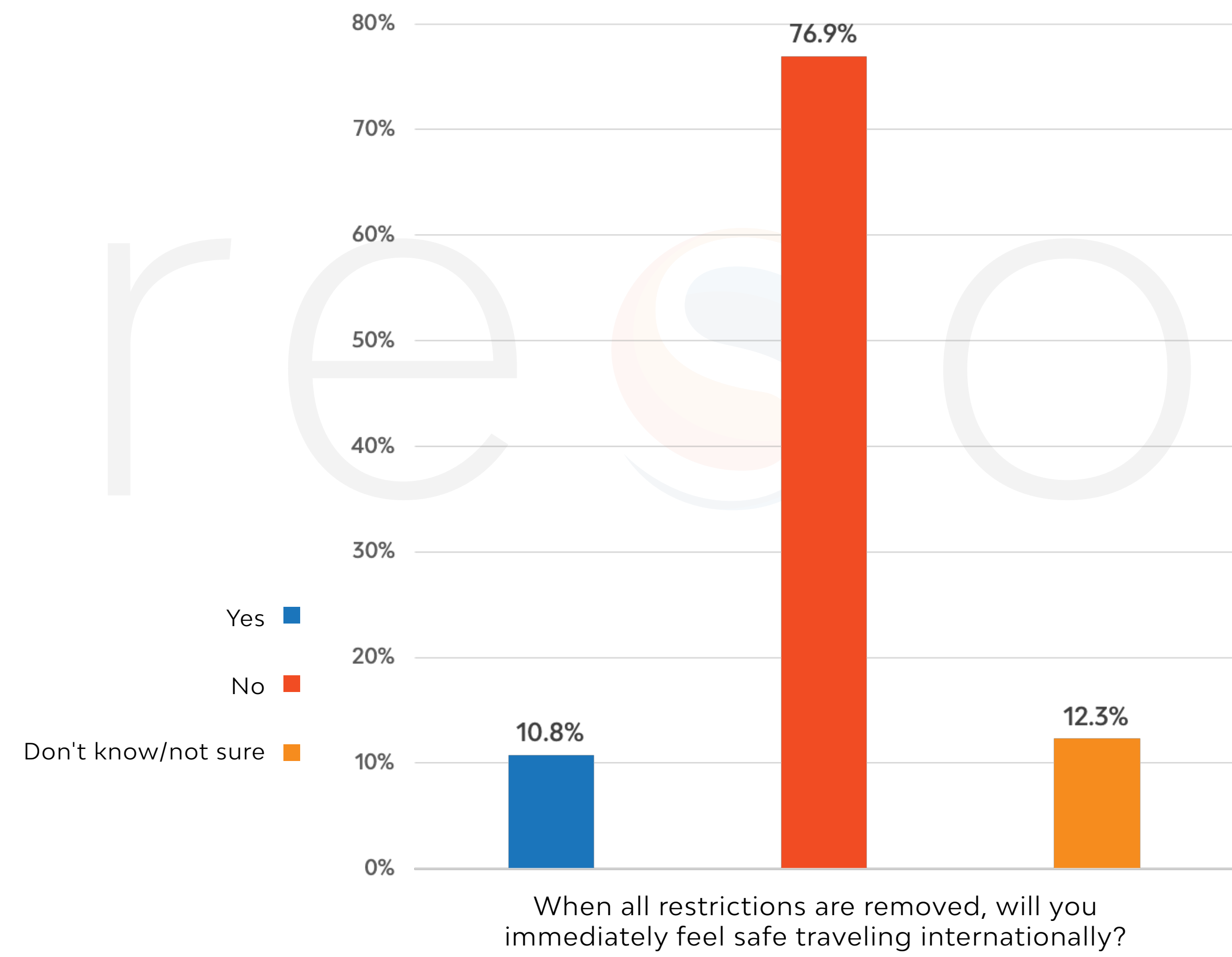
TRAVEL & TRANSPORTATION



Q28 What would be REQUIRED for you to feel comfortable...?
Please select all that apply.

Once I see/hear about others going	6.2%
When the rate of deaths/infections significantly decrease	33.9%
When a vaccine becomes widely available	37.0%
Forced social distancing	20.0%
Everyone wearing masks/gloves	20.7%
Never	2.4%
Don't know/not sure	8.0%

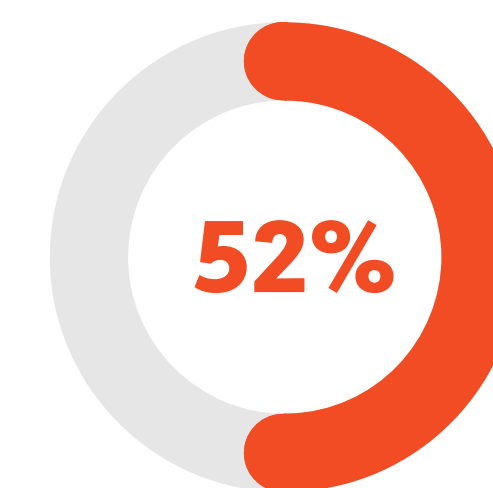
TRAVEL & TRANSPORTATION



Q29 What would be REQUIRED for you to feel comfortable...?
Please select all that apply.

Once I see/hear about others going	8.7%
When the rate of deaths/infections significantly decrease	34.7%
When a vaccine becomes widely available	45.0%
Forced social distancing	17.9%
Everyone wearing masks/gloves	20.2%
Never	17.3%
Don't know/not sure	13.6%

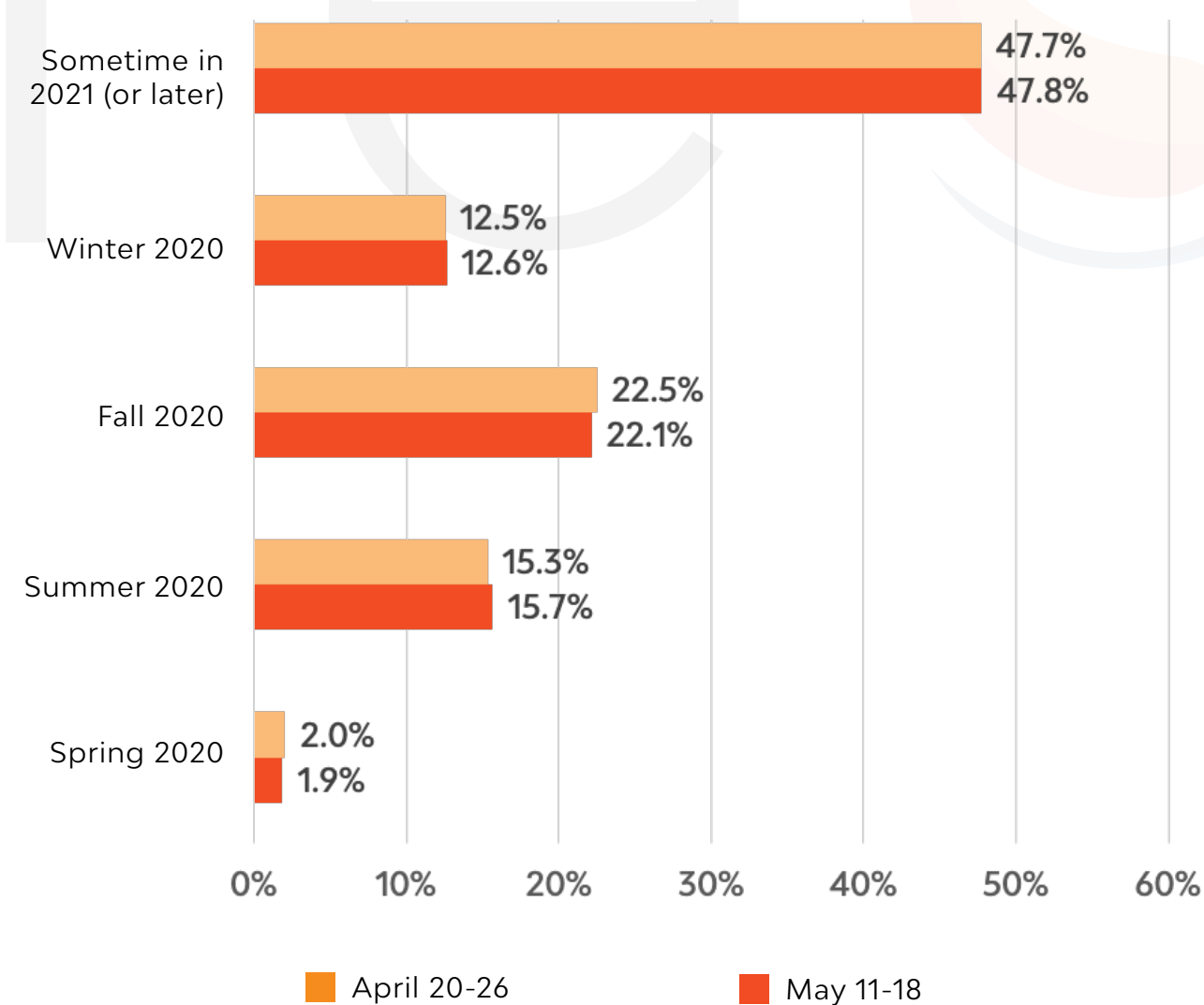
TRAVEL & TRANSPORTATION



52% of travelers
expect to see masks on
everyone

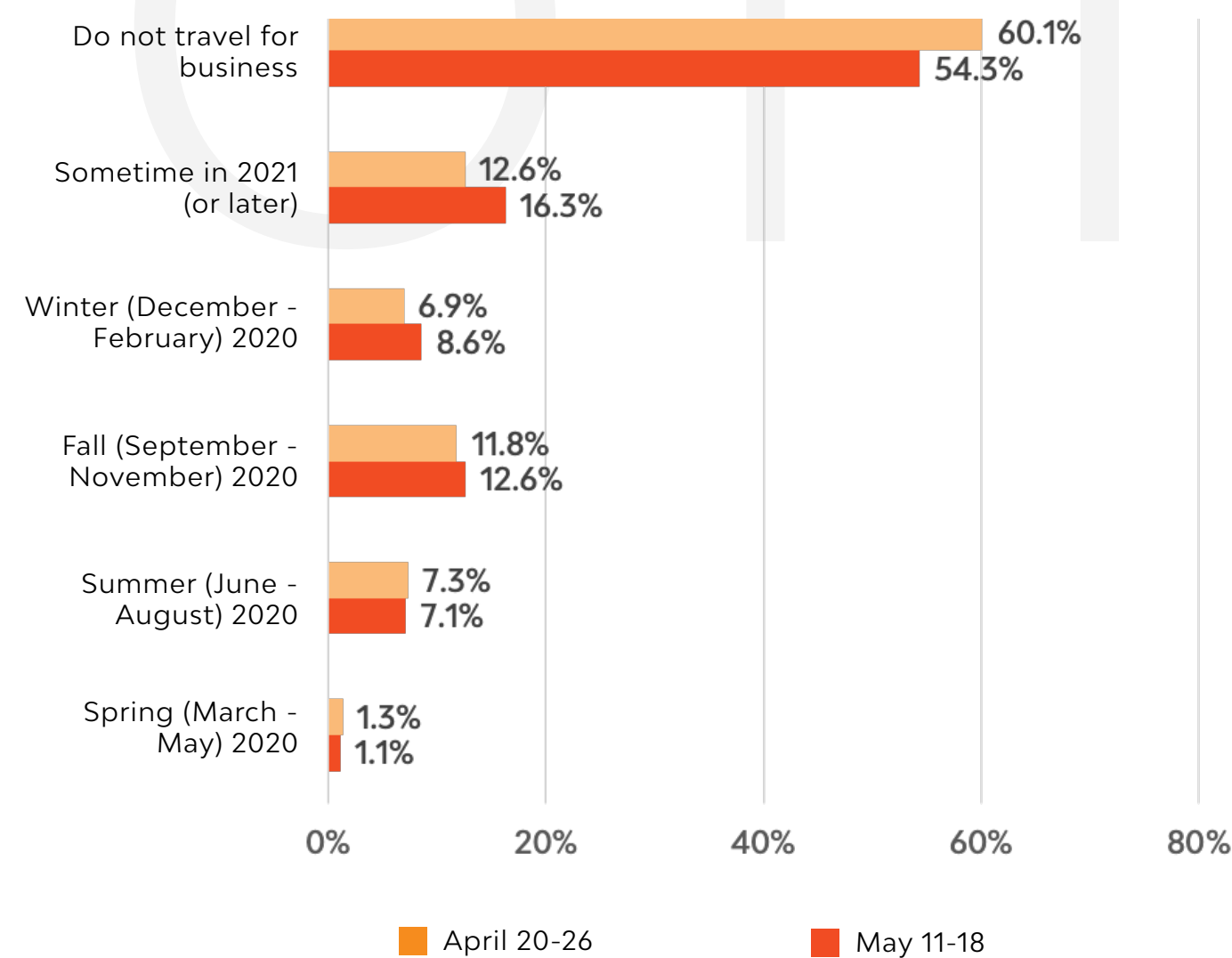
Q30

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



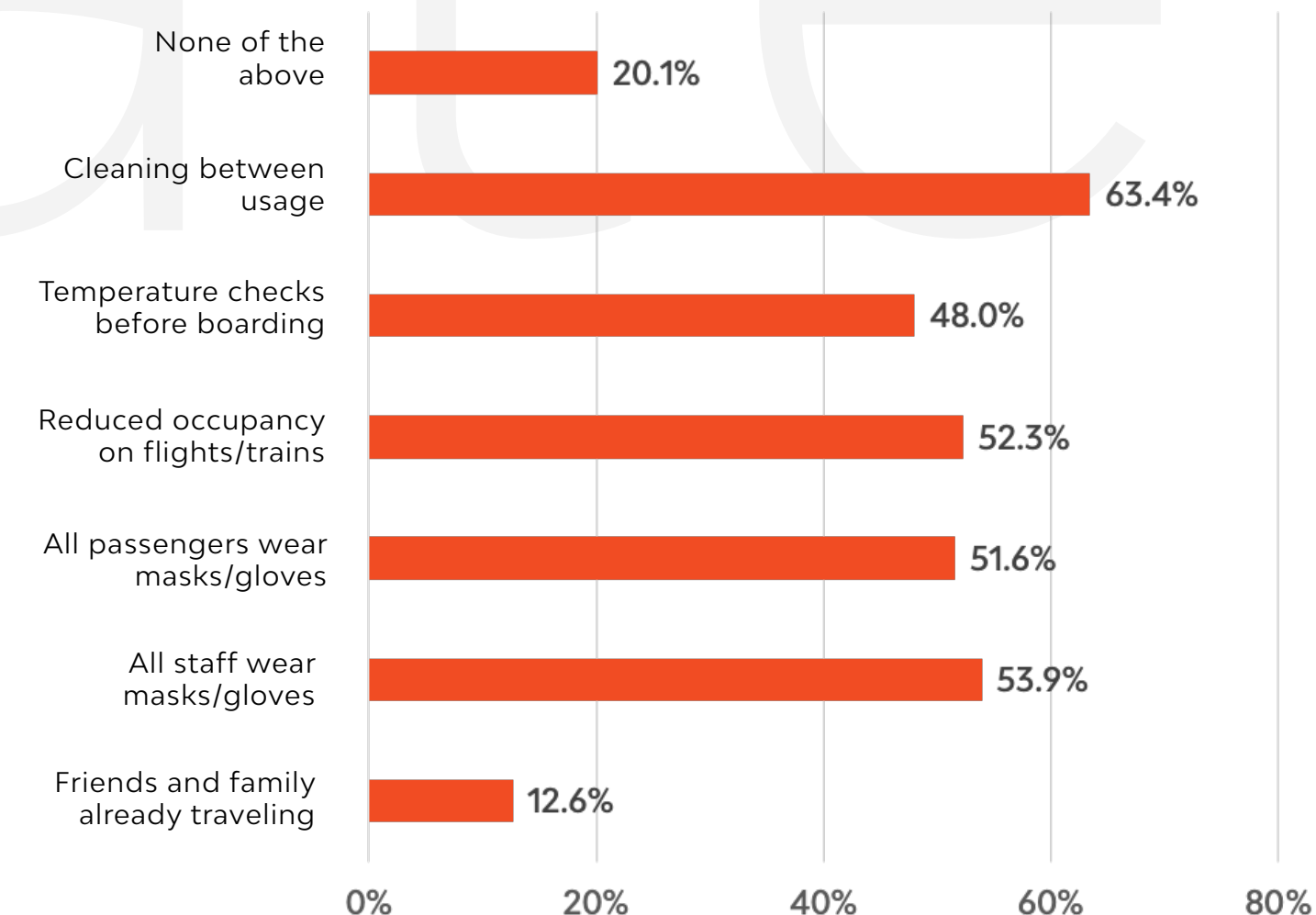
Q31

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

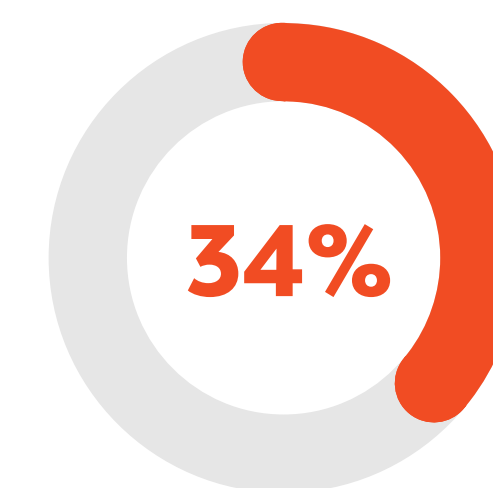


Q32

Which of the following are necessary to take place for your travel (both leisure and business) to return to normal?
Please select all that apply.



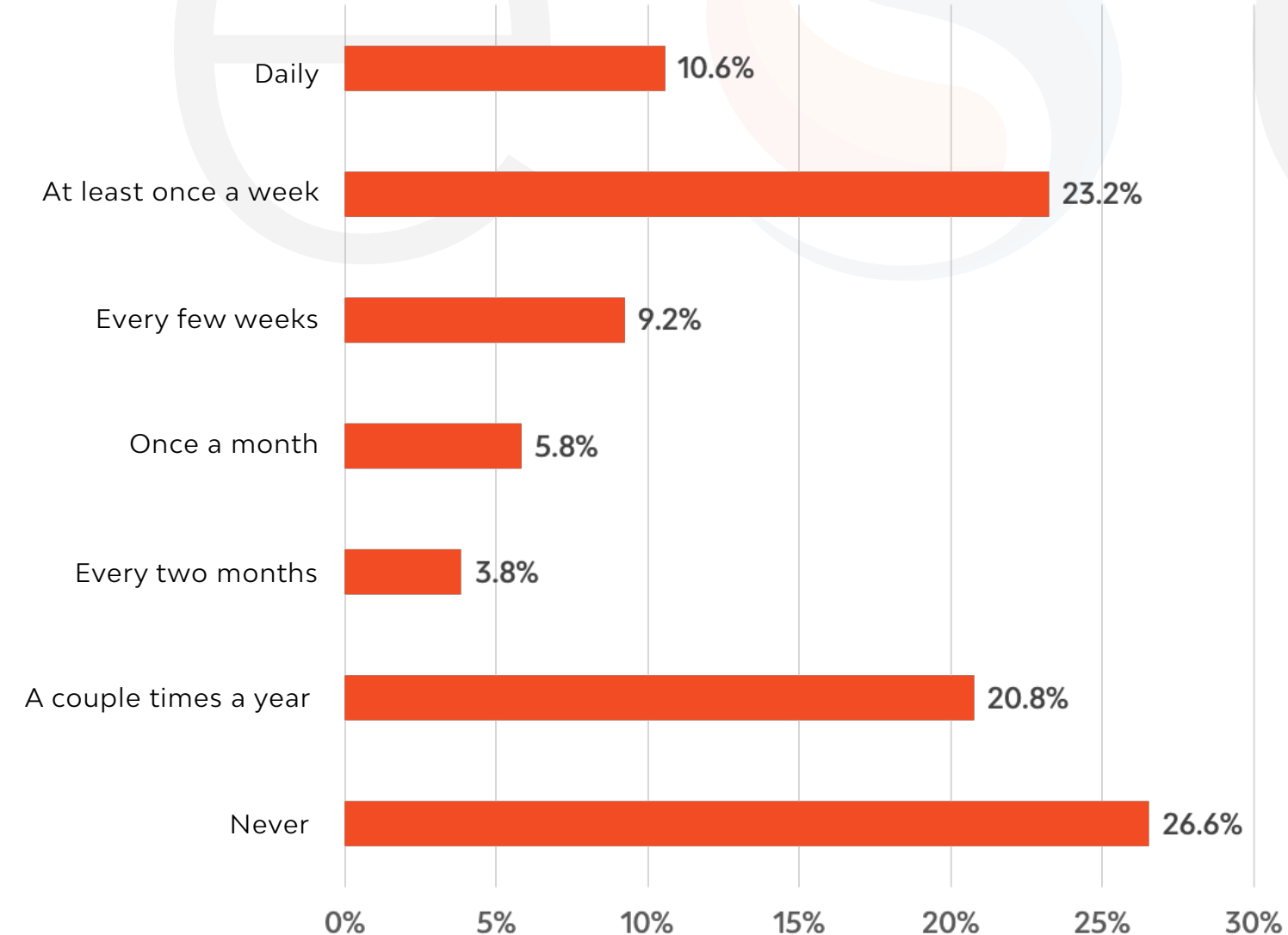
SPORTS & ENTERTAINMENT



34% are missing their daily or weekly sports fix

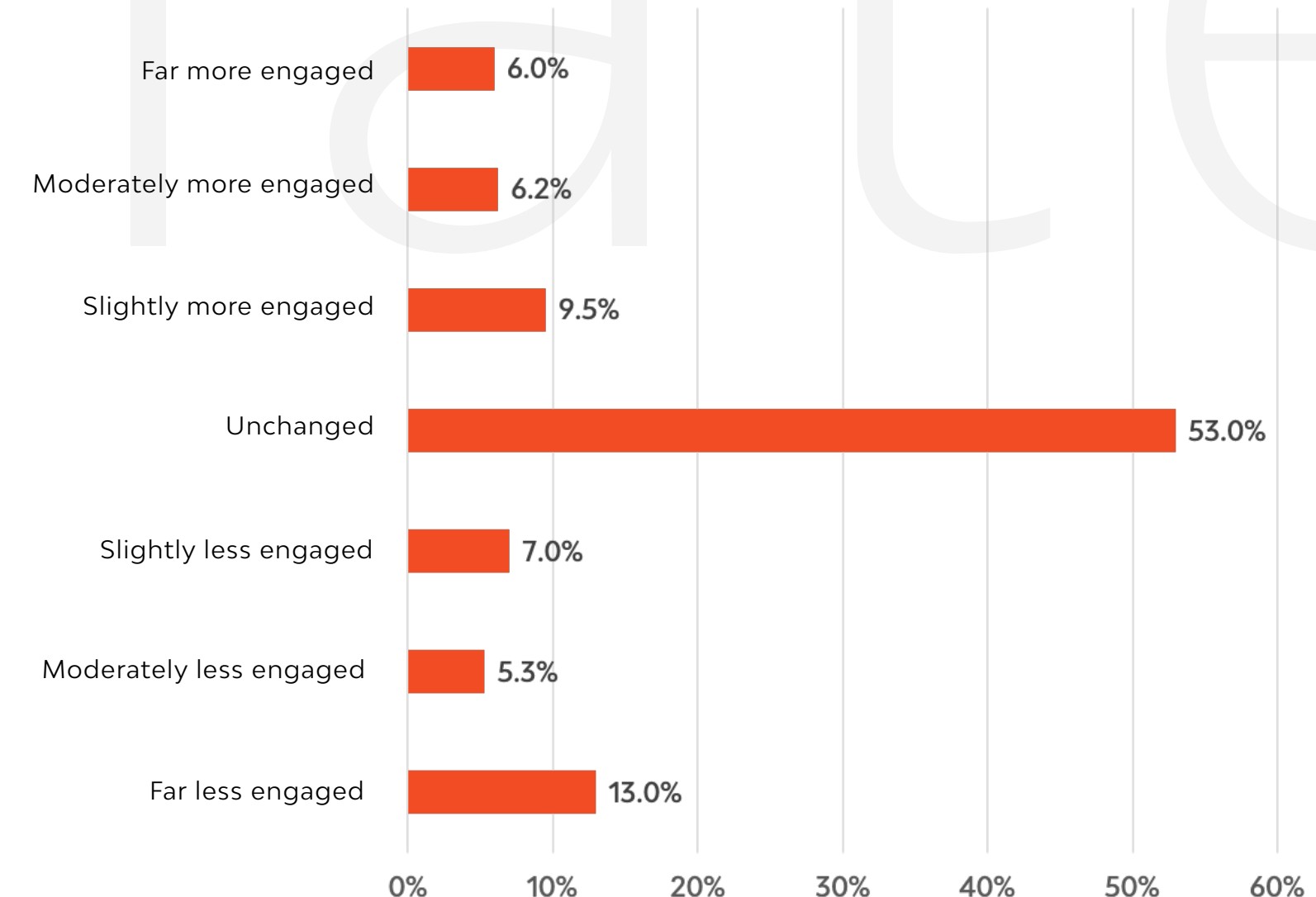
Q33

Professional sports (MLB, NBA, NHL, NFL) games have currently been canceled for the foreseeable future. Following the end of the current coronavirus situation and the return of live sports, with what frequency do you believe you will watch games?



Q34

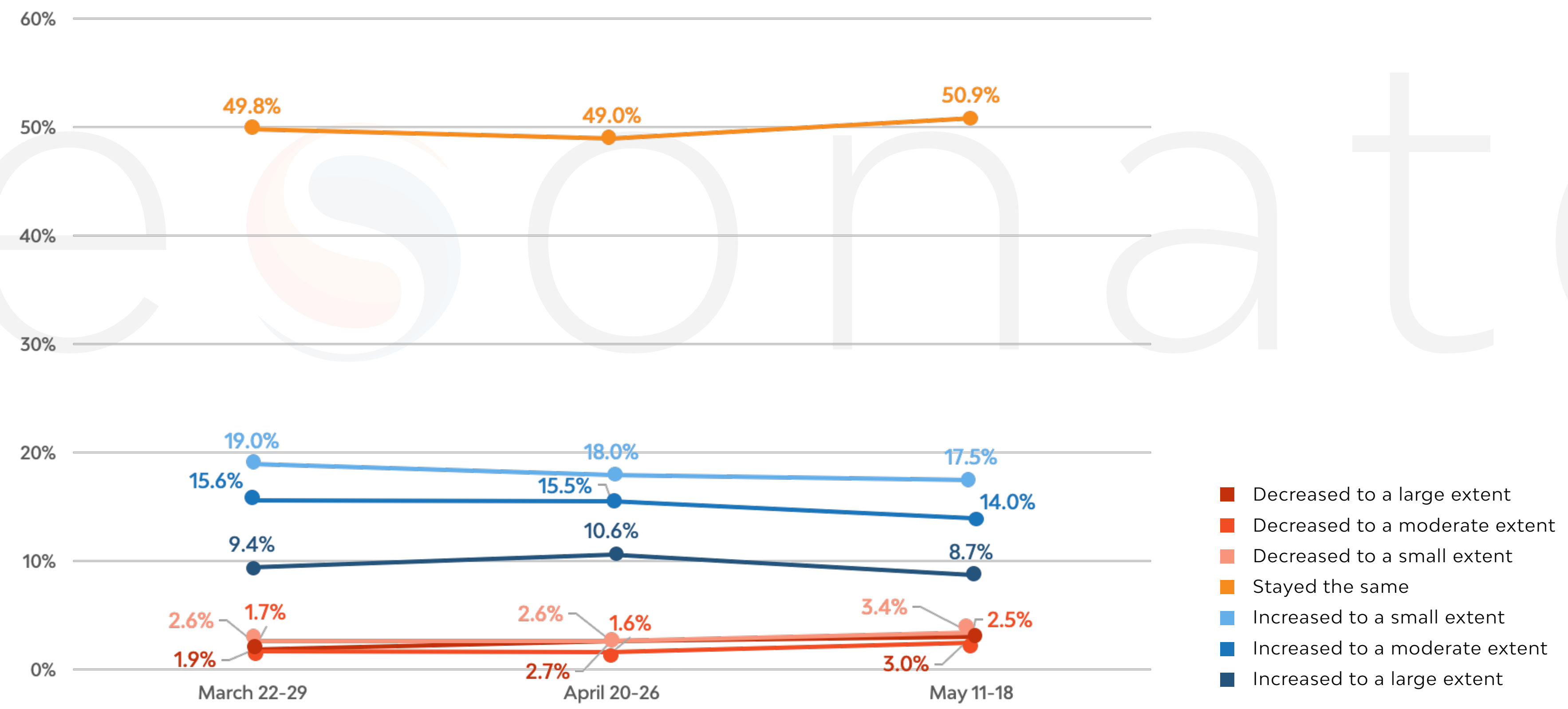
Compared to previous years, do you expect to be more or less engaged with following live sporting events when they return to television?



MEDIA

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

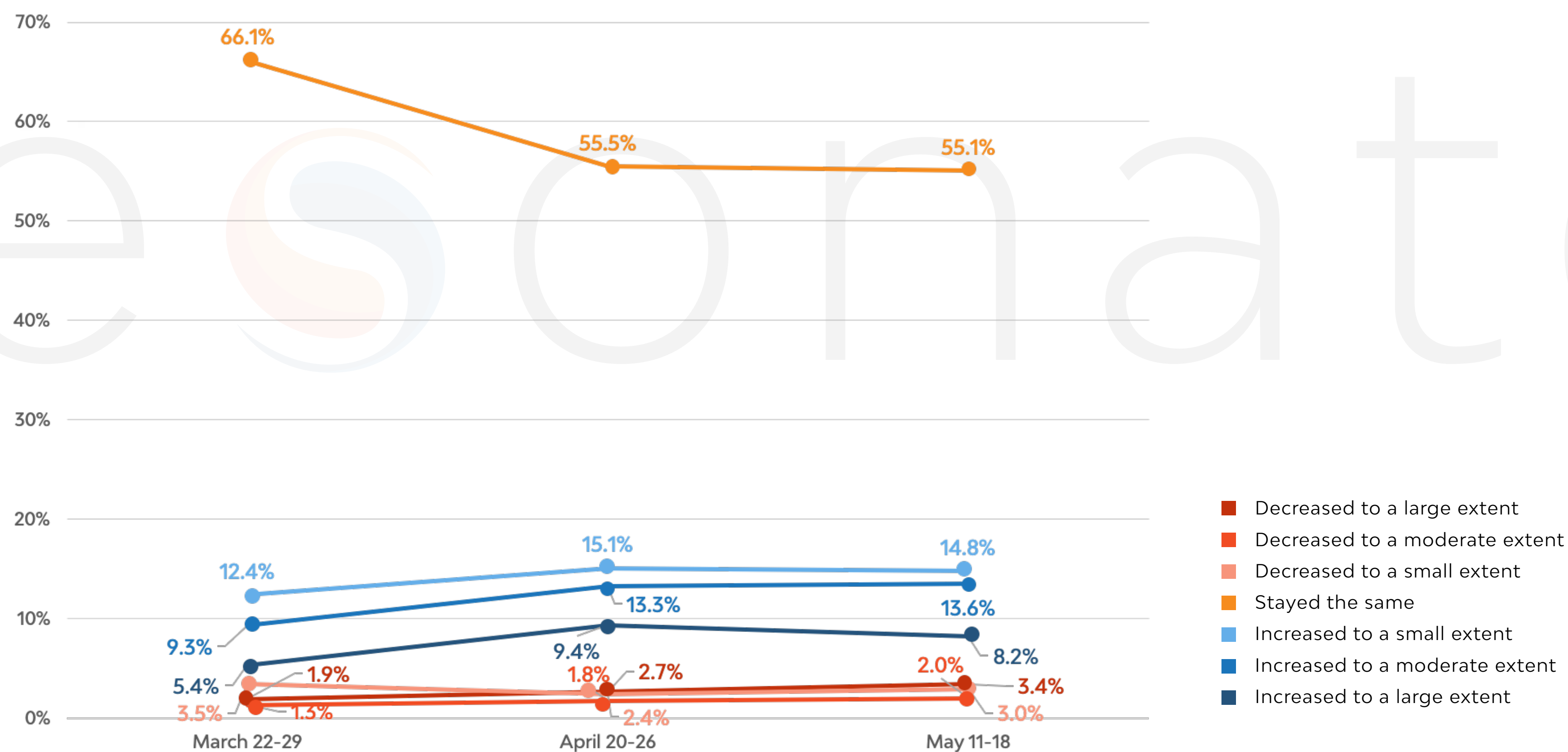
Q35a Watching broadcast TV



MEDIA

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

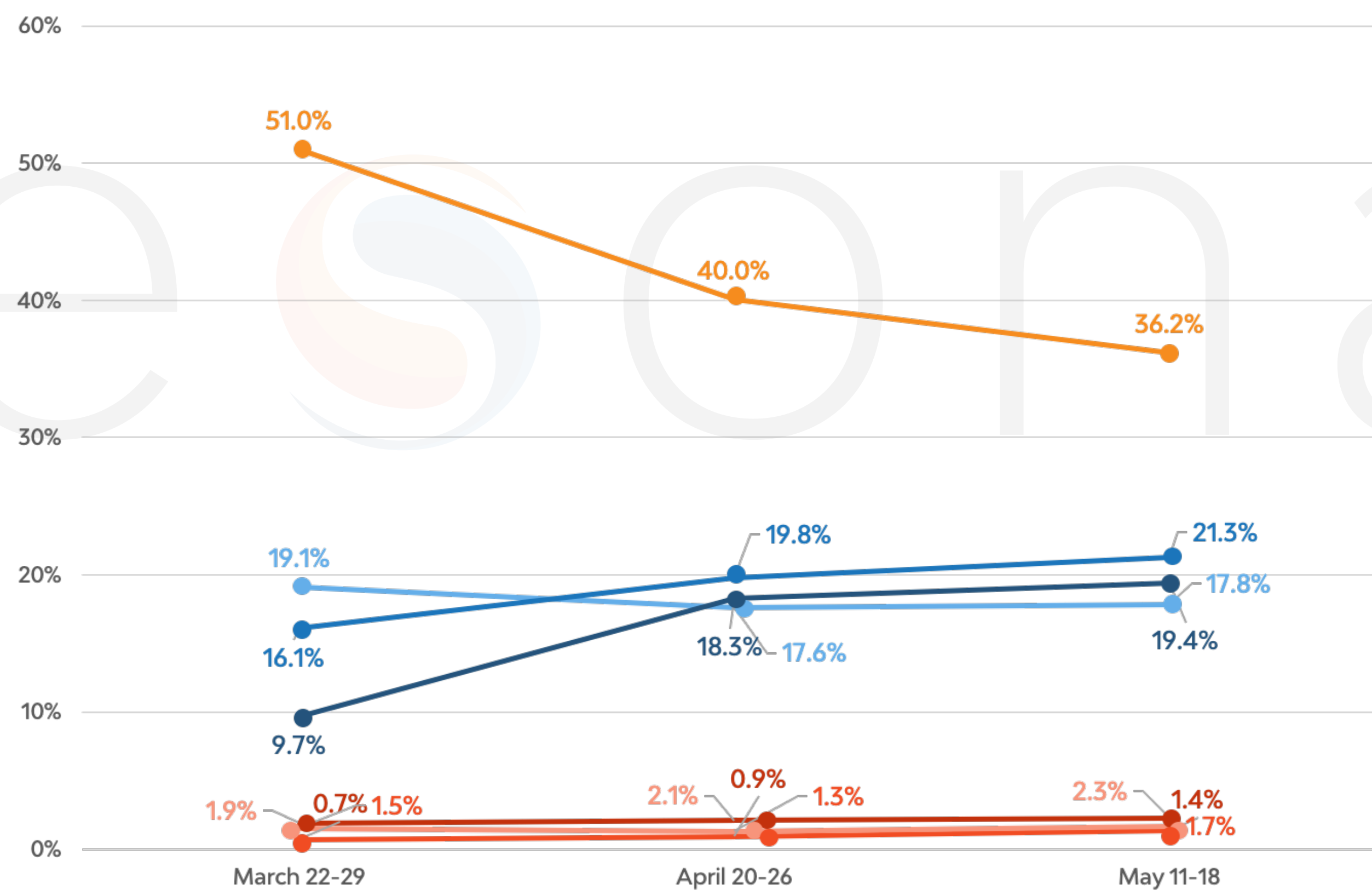
Q35b Watching my preferred cable television channels



MEDIA

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

Q35c Watching streaming TV (e.g., Hulu, Disney+, Prime, Netflix, Pluto)

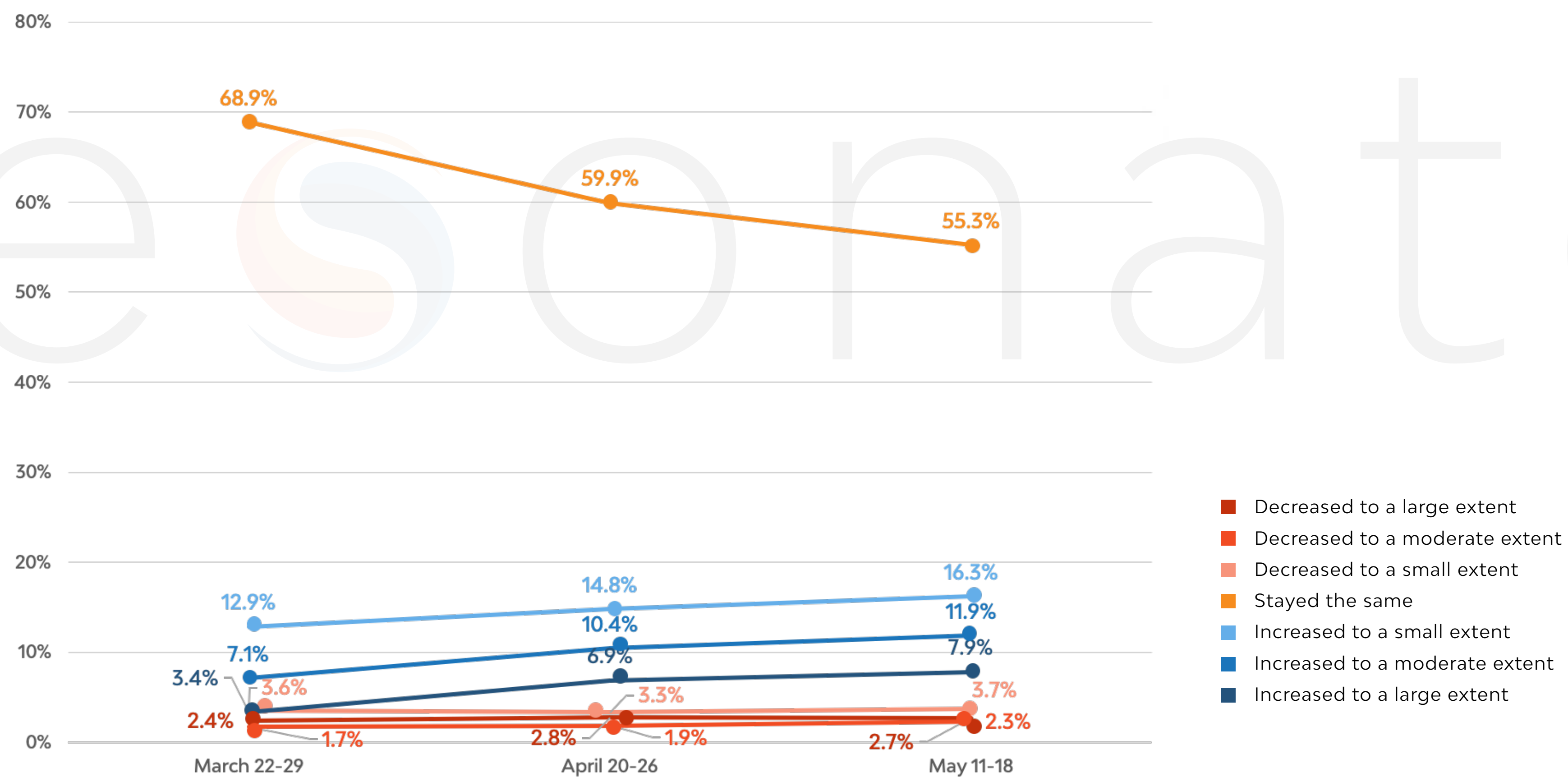


Streaming TV is having a moment: **58.5% of consumers reported an increase**

MEDIA

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

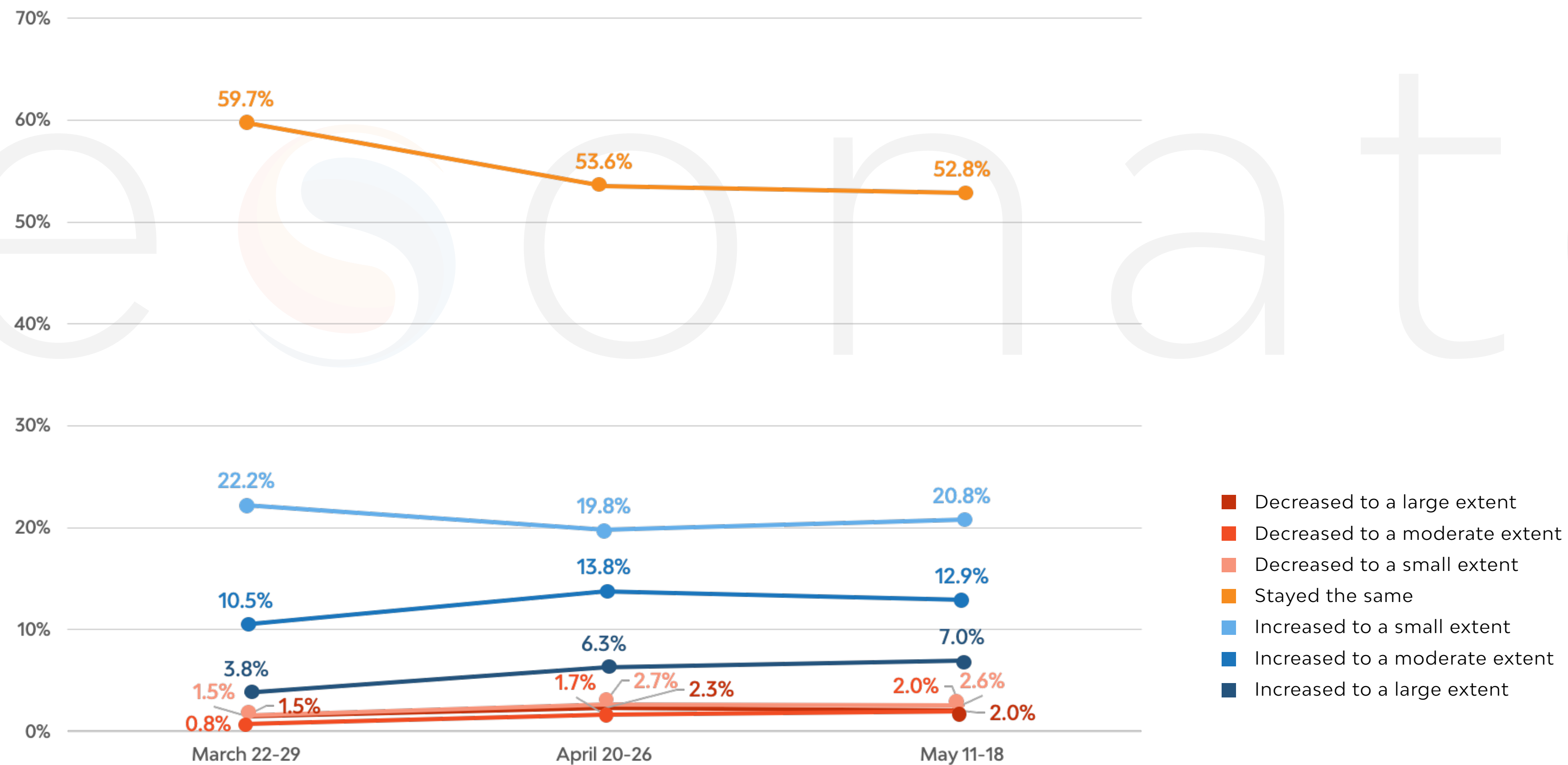
Q35d Listening to streaming music, radio, or podcasts (e.g., Spotify, Pandora)



MEDIA

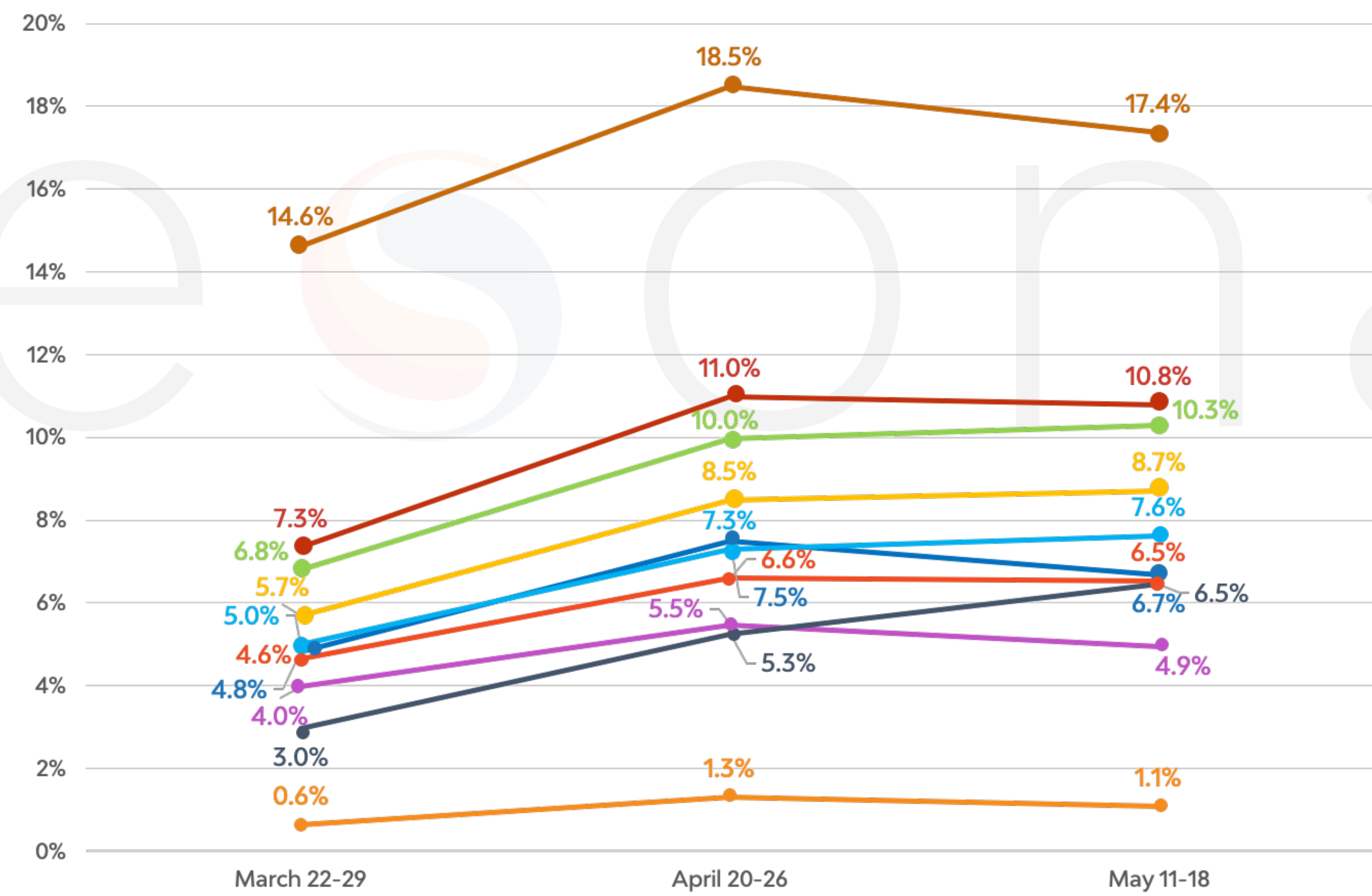
As a result of the coronavirus situation, how has the frequency with which you do the following changed....?

Q35e Reading books, newspapers or magazines



MEDIA

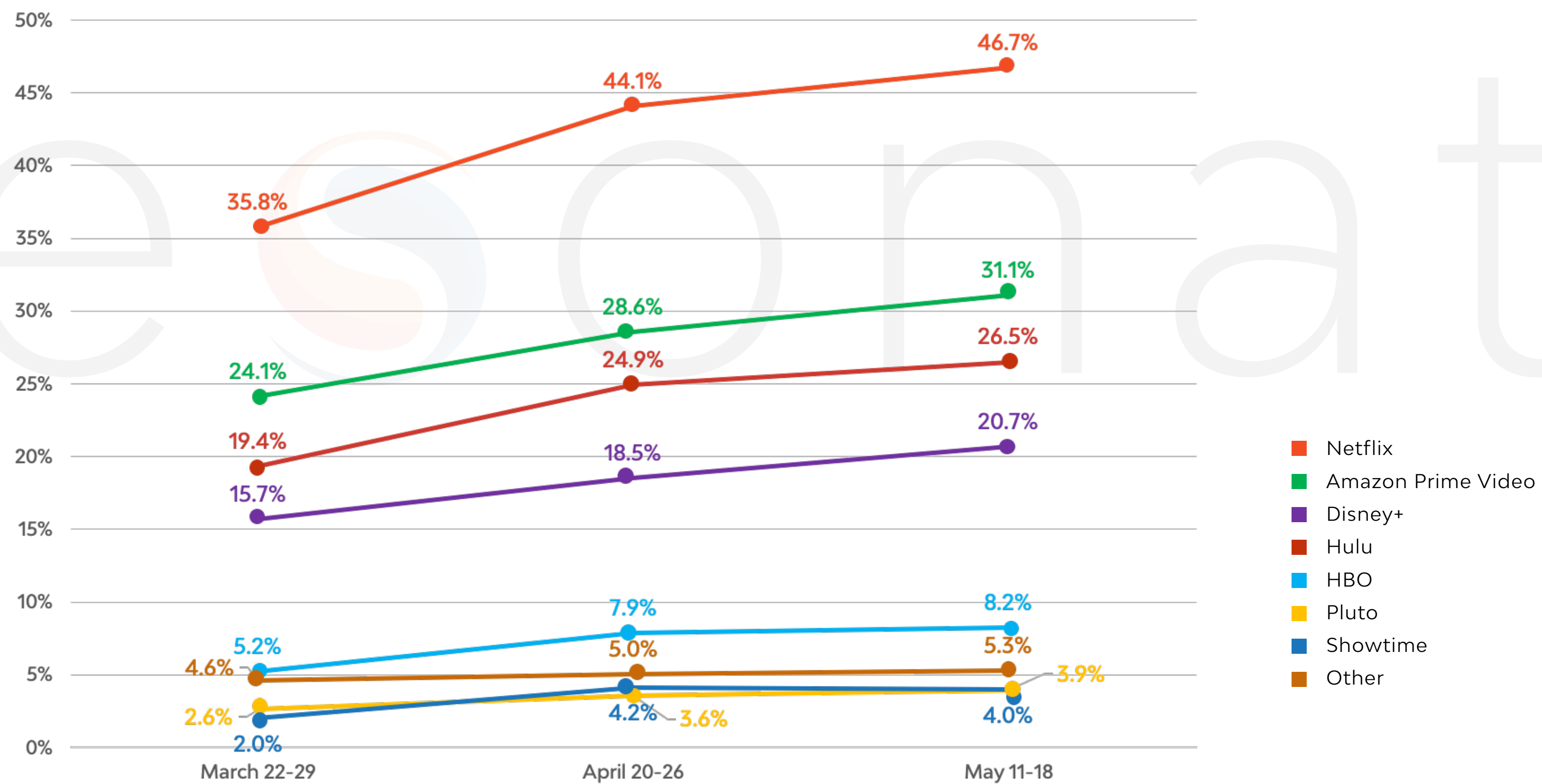
Q36 Which cable TV channels are you now watching more?
Please select all that apply.



2X No live sports? **ESPN's** numbers doubled, potentially as a result of series like The Last Dance

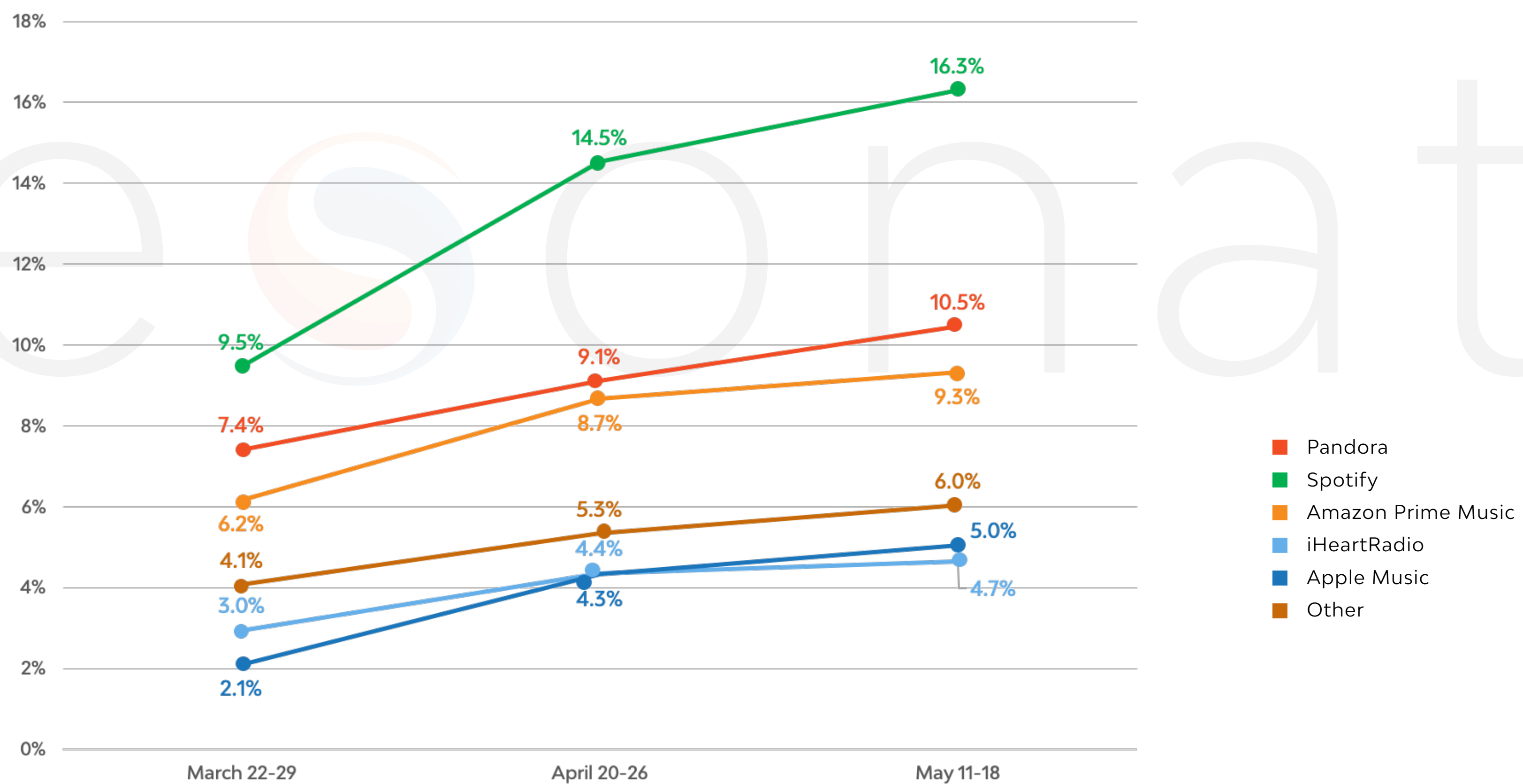
MEDIA

Q37 Which streaming TV services are you now using more?
Please select all that apply.



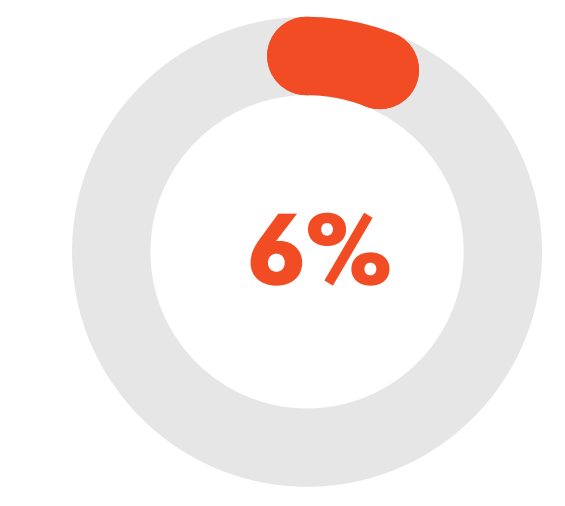
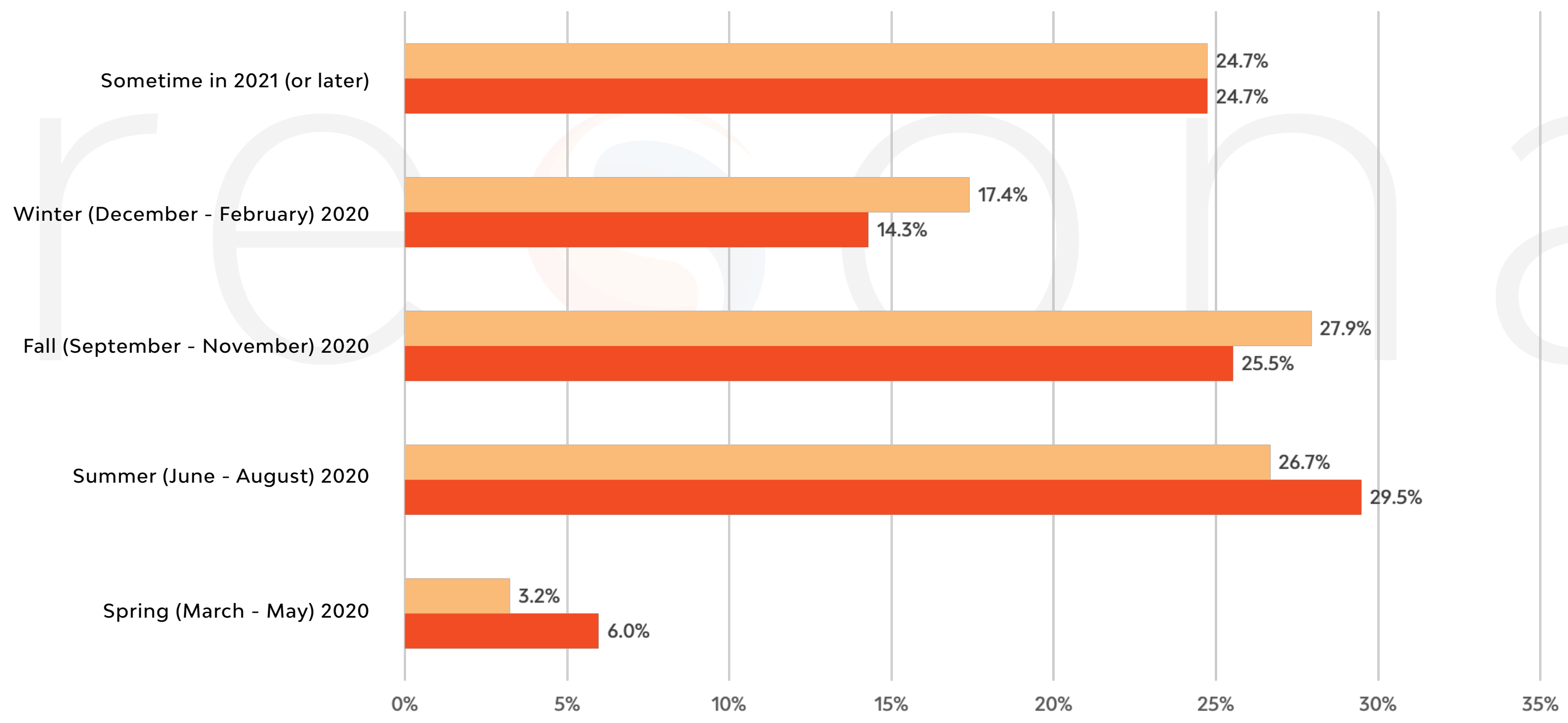
MEDIA

Q38 Which streaming music/radio services are you now using more?
Please select all that apply.



RETAIL

Q39 When do you believe you will once again dine-in at restaurants?



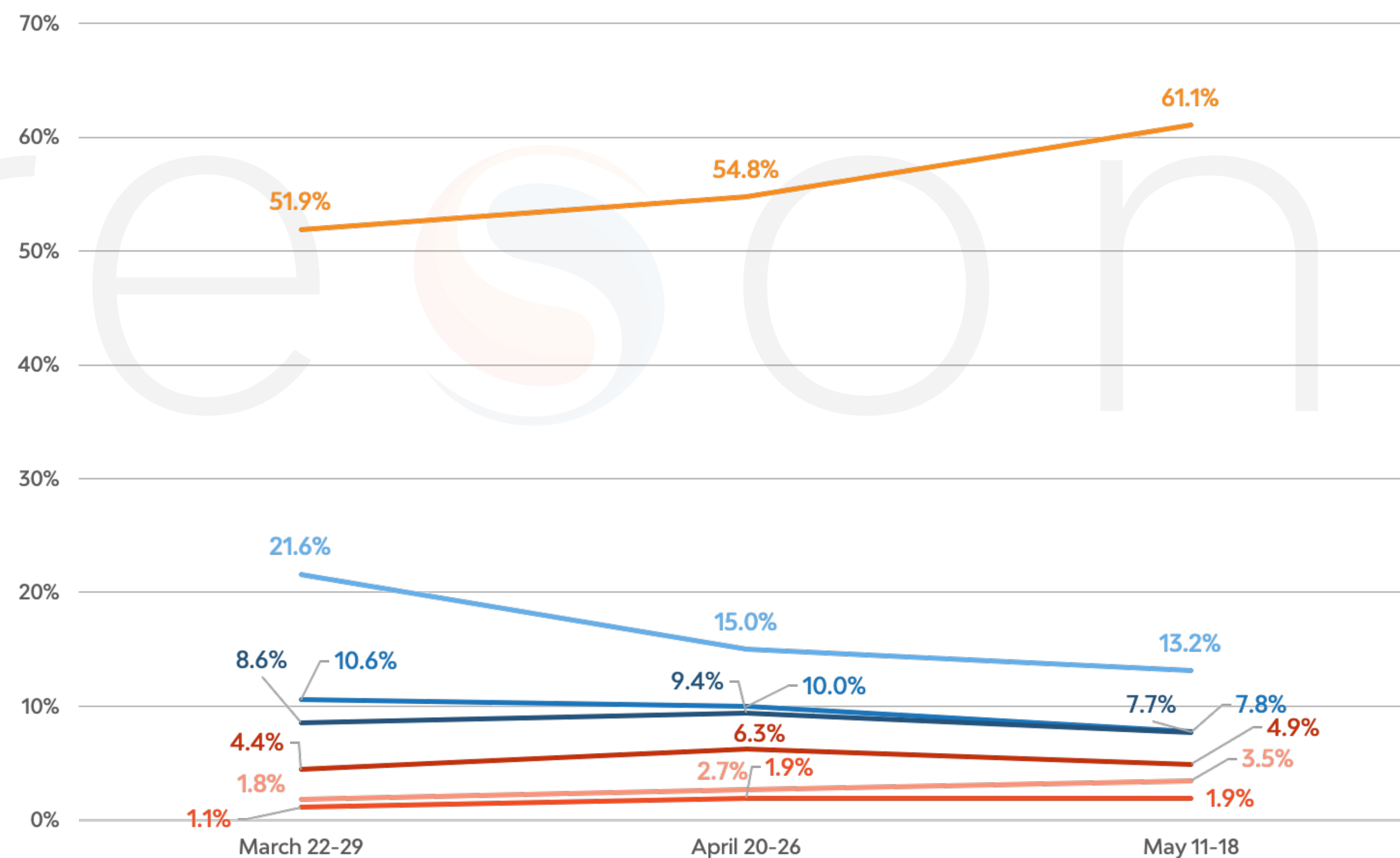
6% more people now believe we could be dining in restaurants by August 2020

■ April 20-26
■ May 11-18

RETAIL

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

Q40a Order groceries online



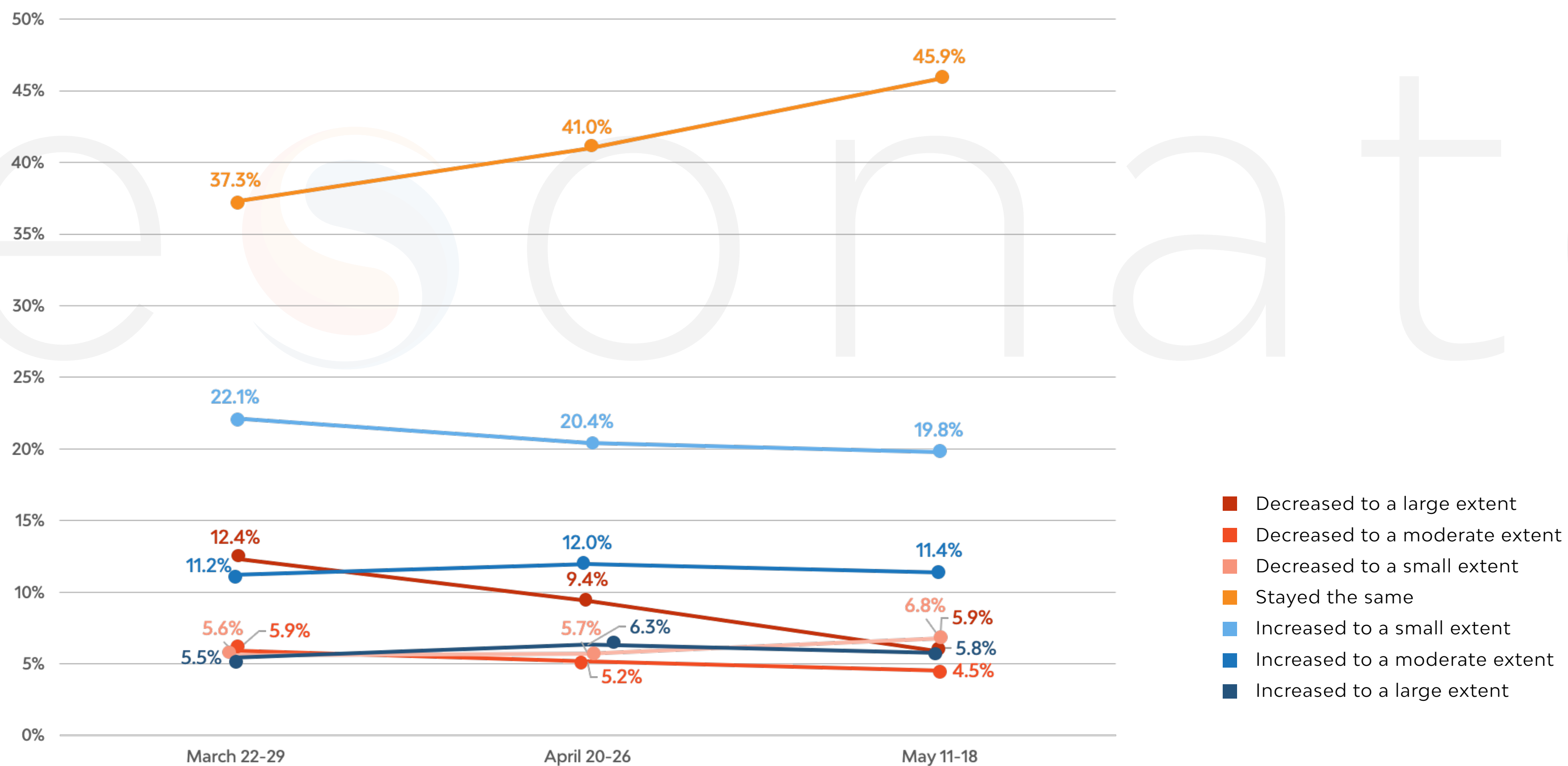
12.1%

Online grocery delivery saw a **12.1% drop in shoppers increasing usage**

RETAIL

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

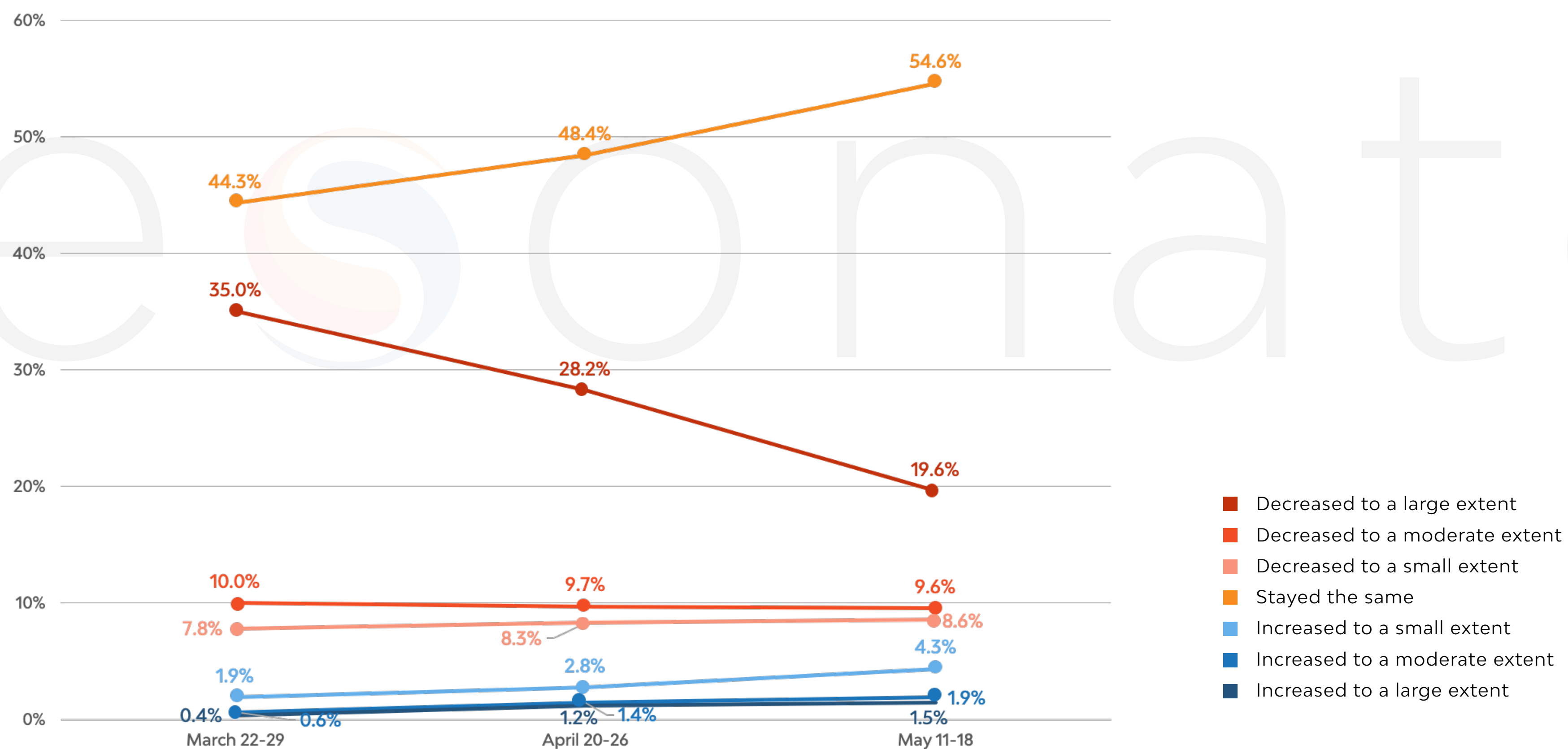
Q40b Order food or takeout for delivery



RETAIL

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

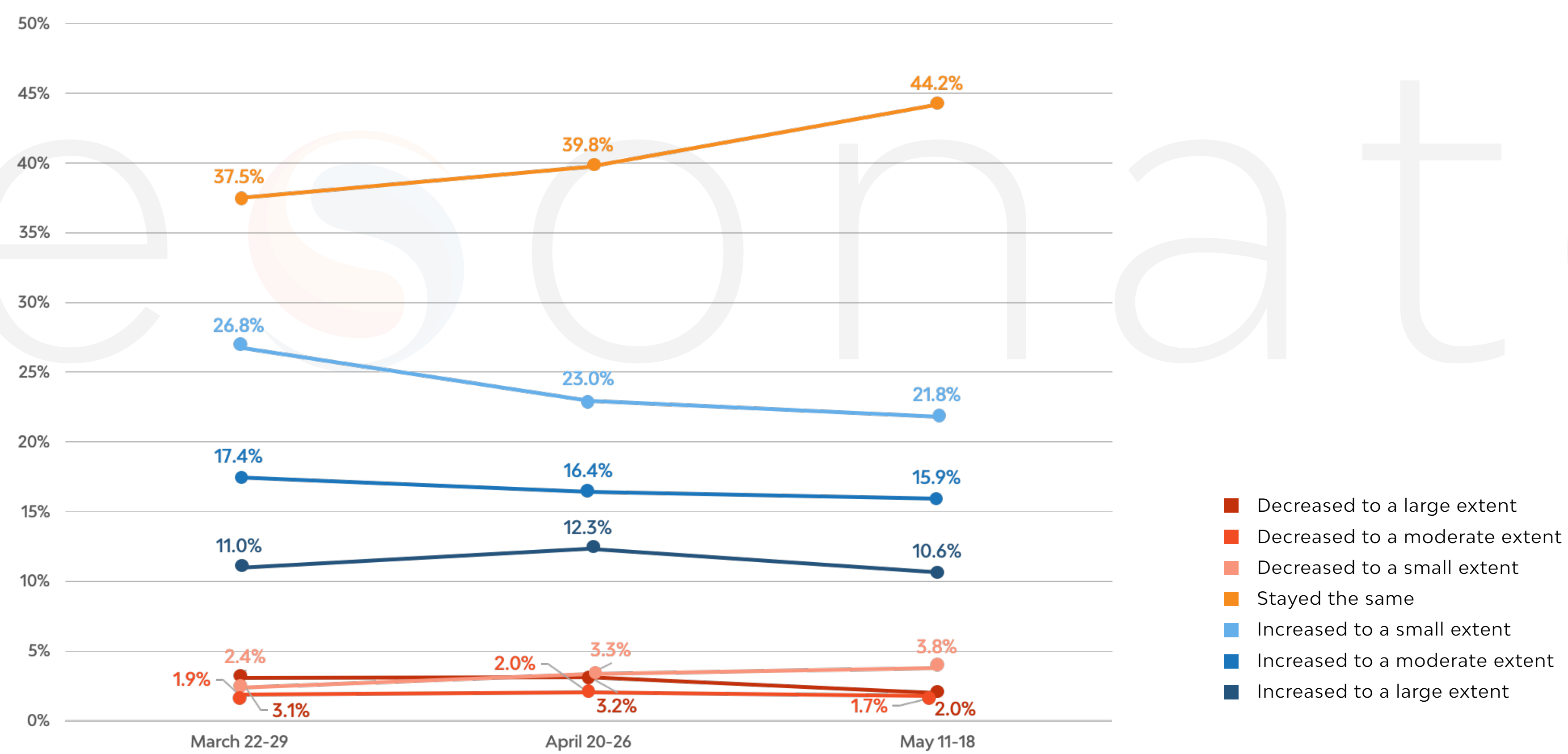
Q40c Make a major purchase (e.g., an automobile)



RETAIL

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

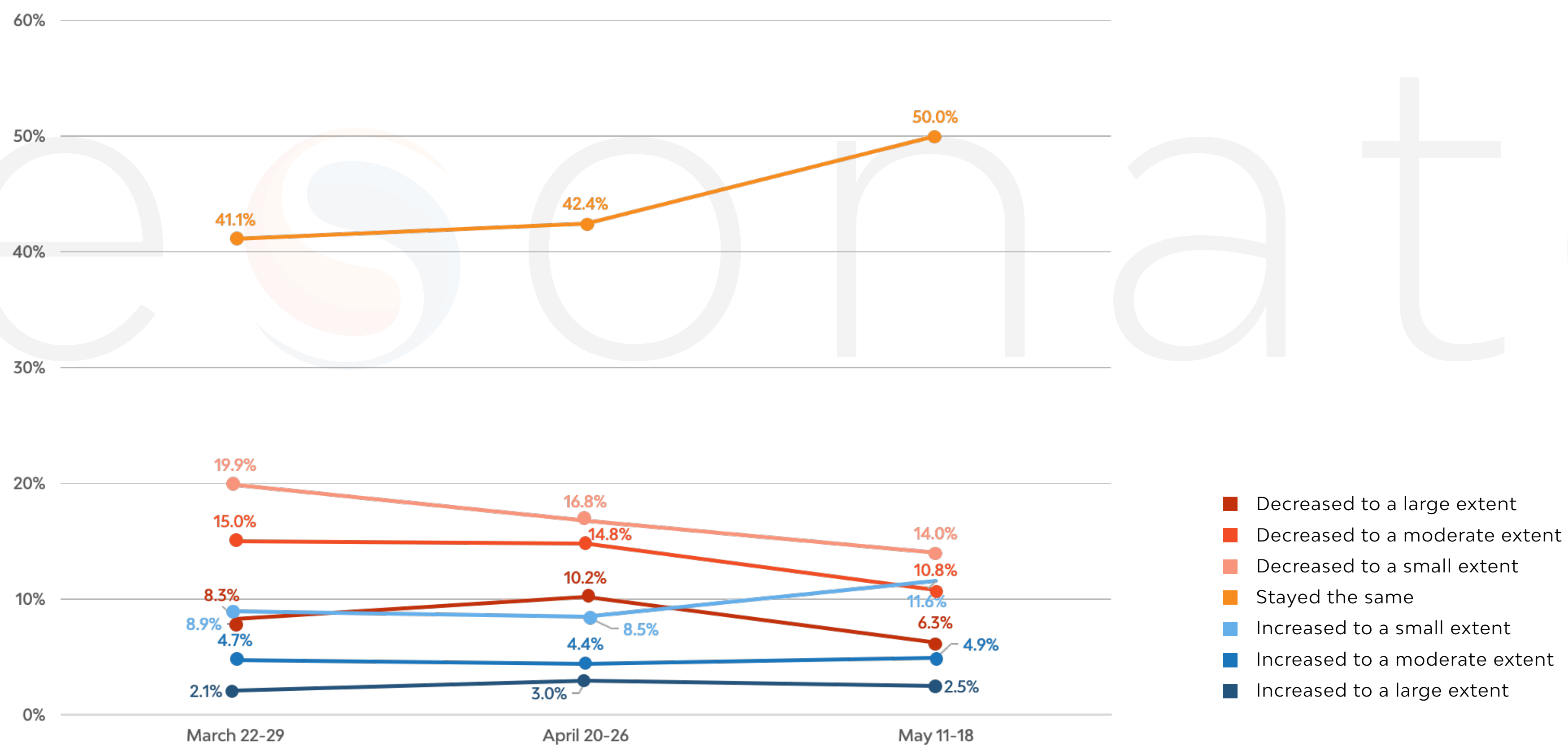
Q40d Purchase products online



RETAIL

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

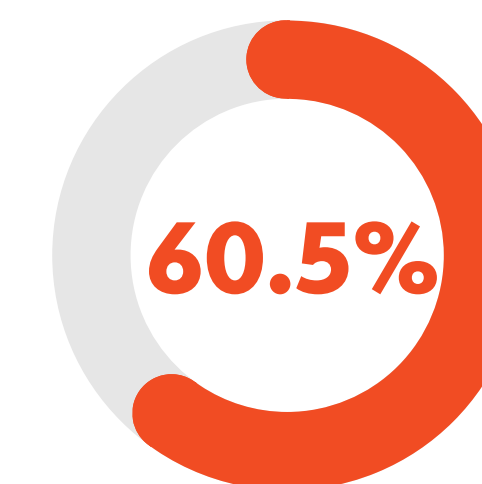
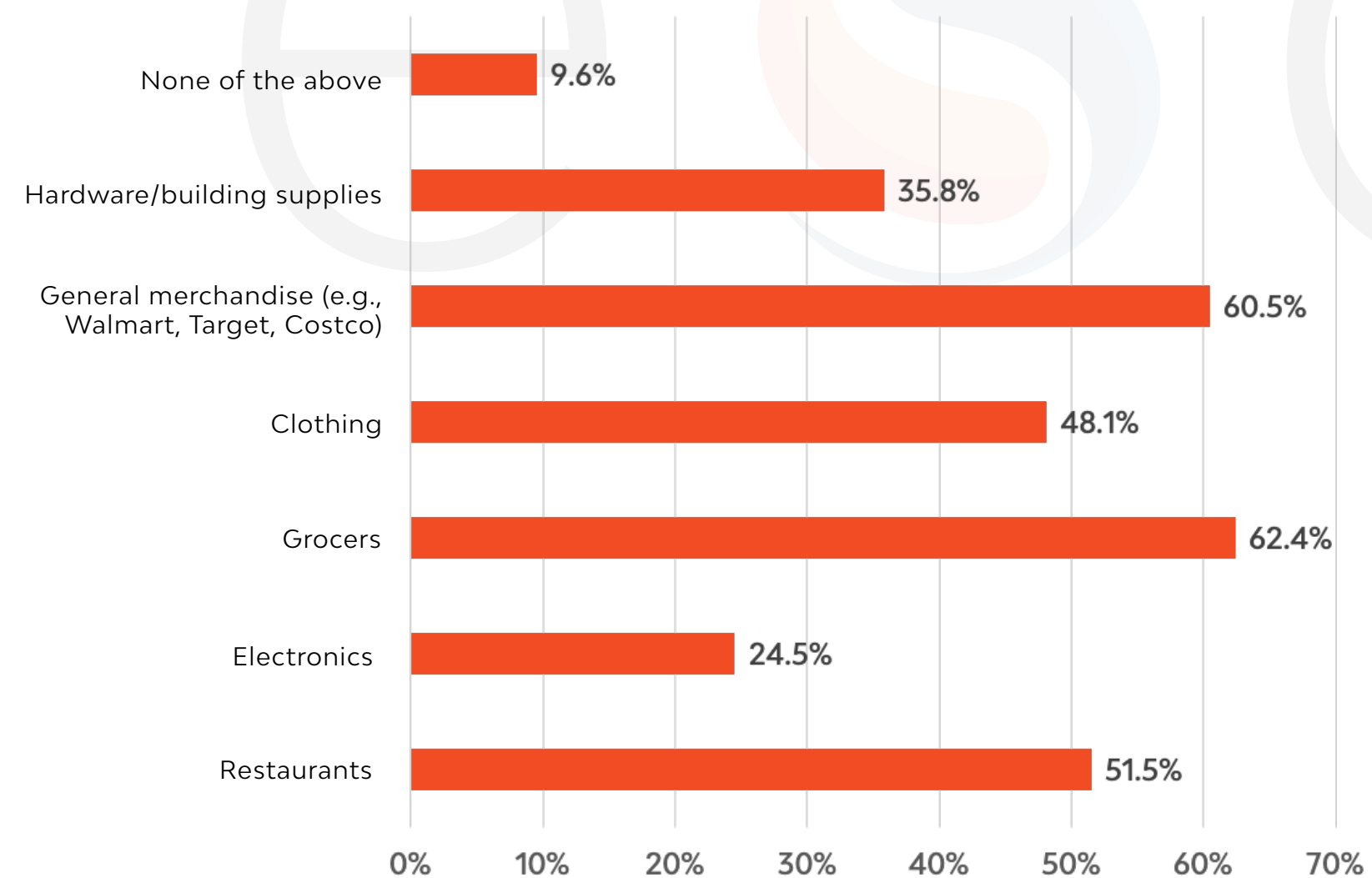
Q40e Visiting a grocery store or pharmacy



RETAIL

Q41

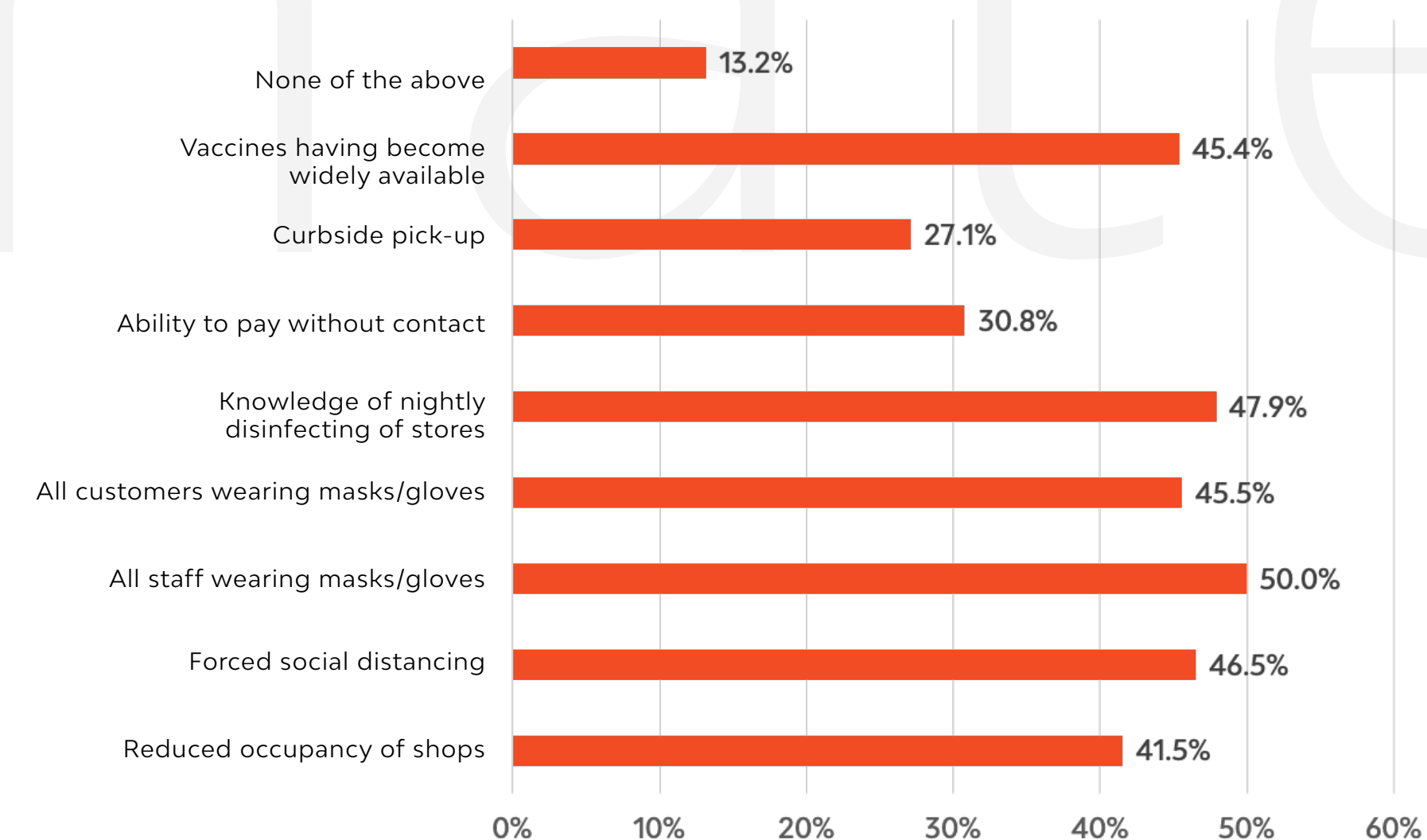
Once shops open, which of these types of shopping do you believe you will go back to doing at physical stores, rather than online? *Please select all that apply.*



60.5% are eager to get back to strolling through Target

Q42

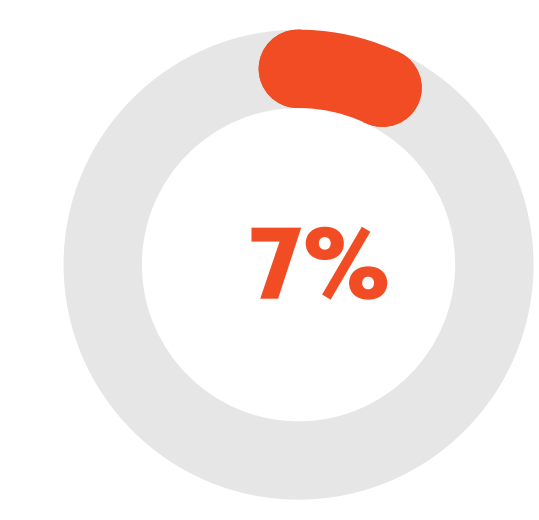
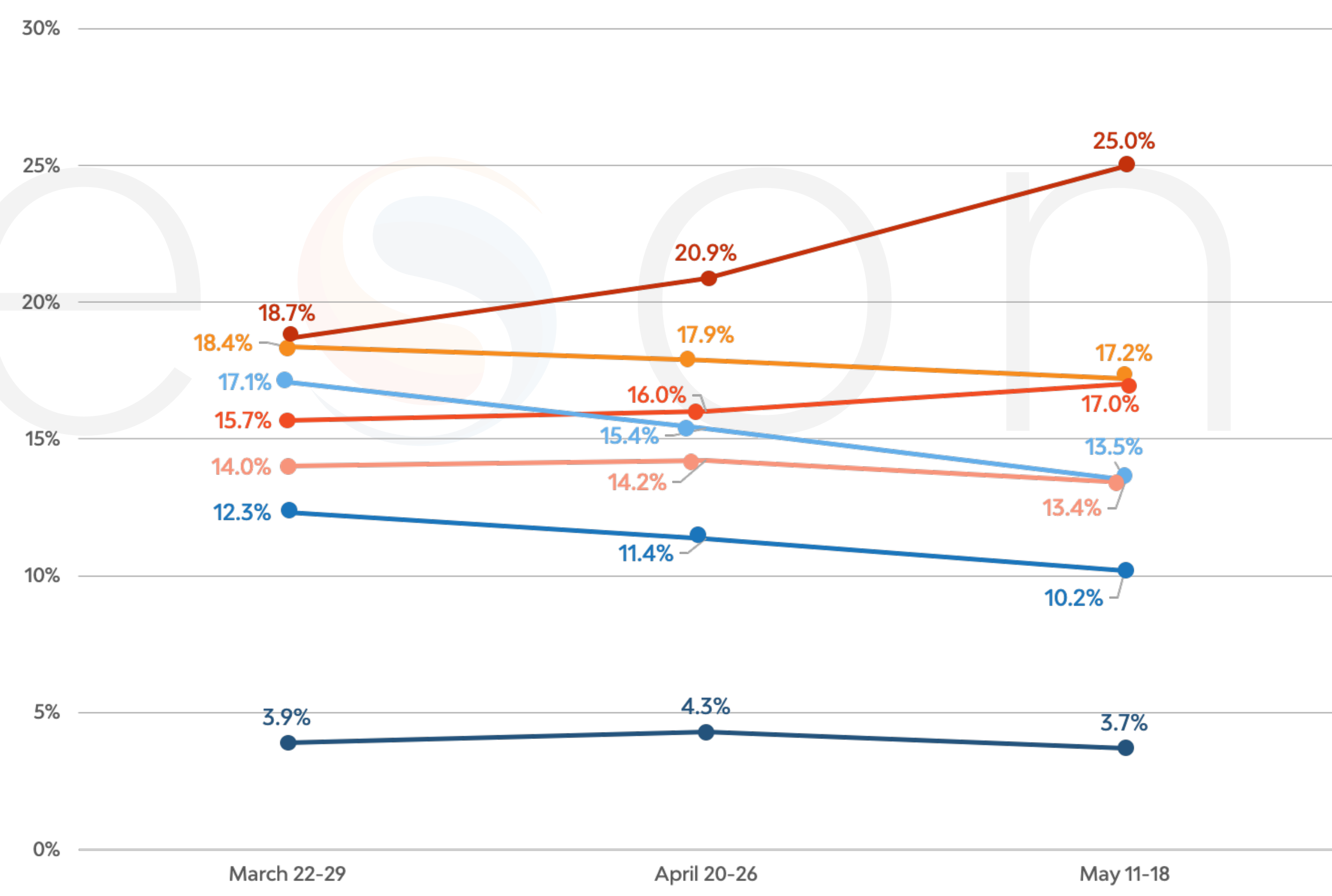
Which of the following would be required in order for you to return to shopping from stores once shops open? *Please select all that apply.*



POLITICS

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

Q43a Federal government can be trusted



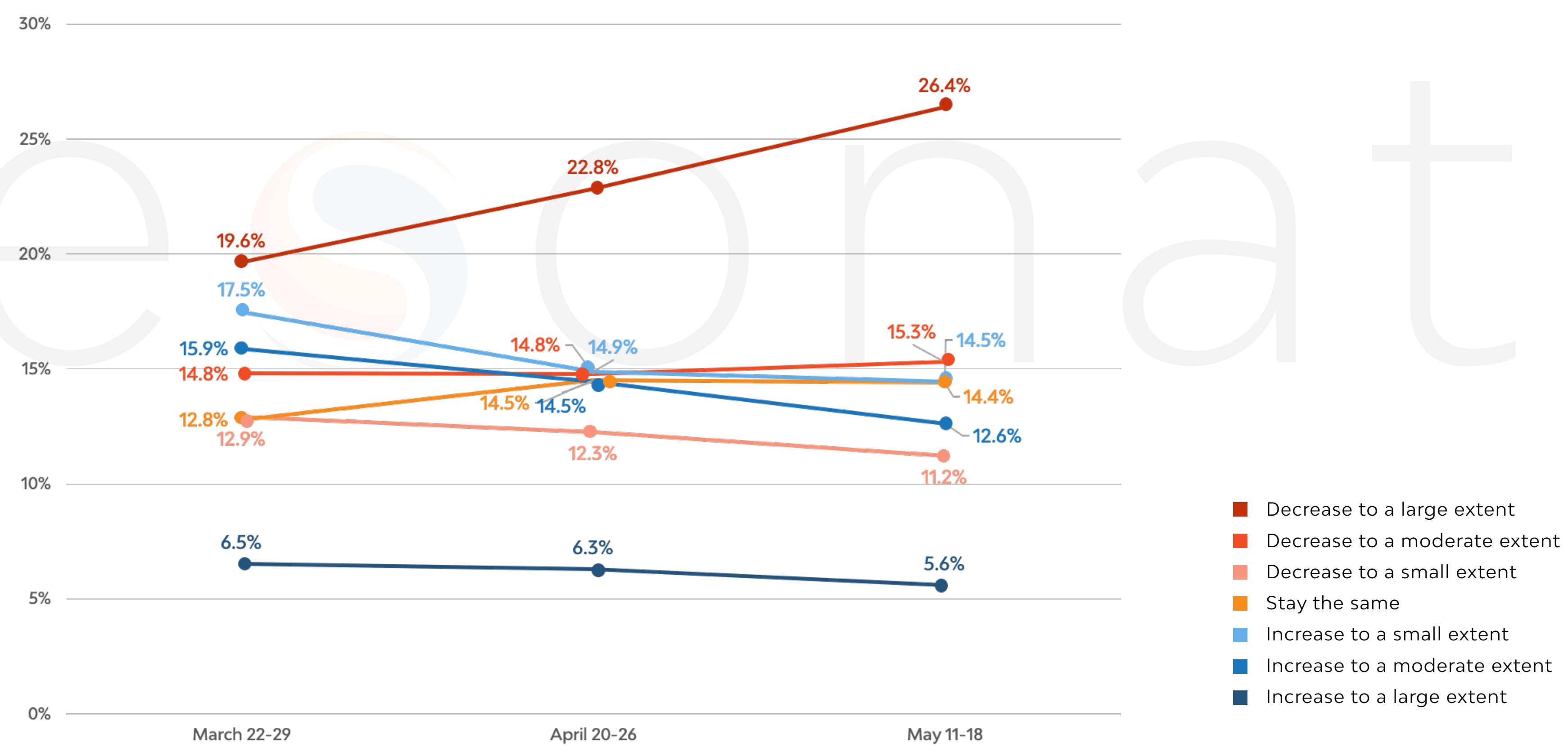
Trust in the federal government has **decreased by 7%** March to May

- Decrease to a large extent
- Decrease to a moderate extent
- Decrease to a small extent
- Stay the same
- Increase to a small extent
- Increase to a moderate extent
- Increase to a large extent

POLITICS

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

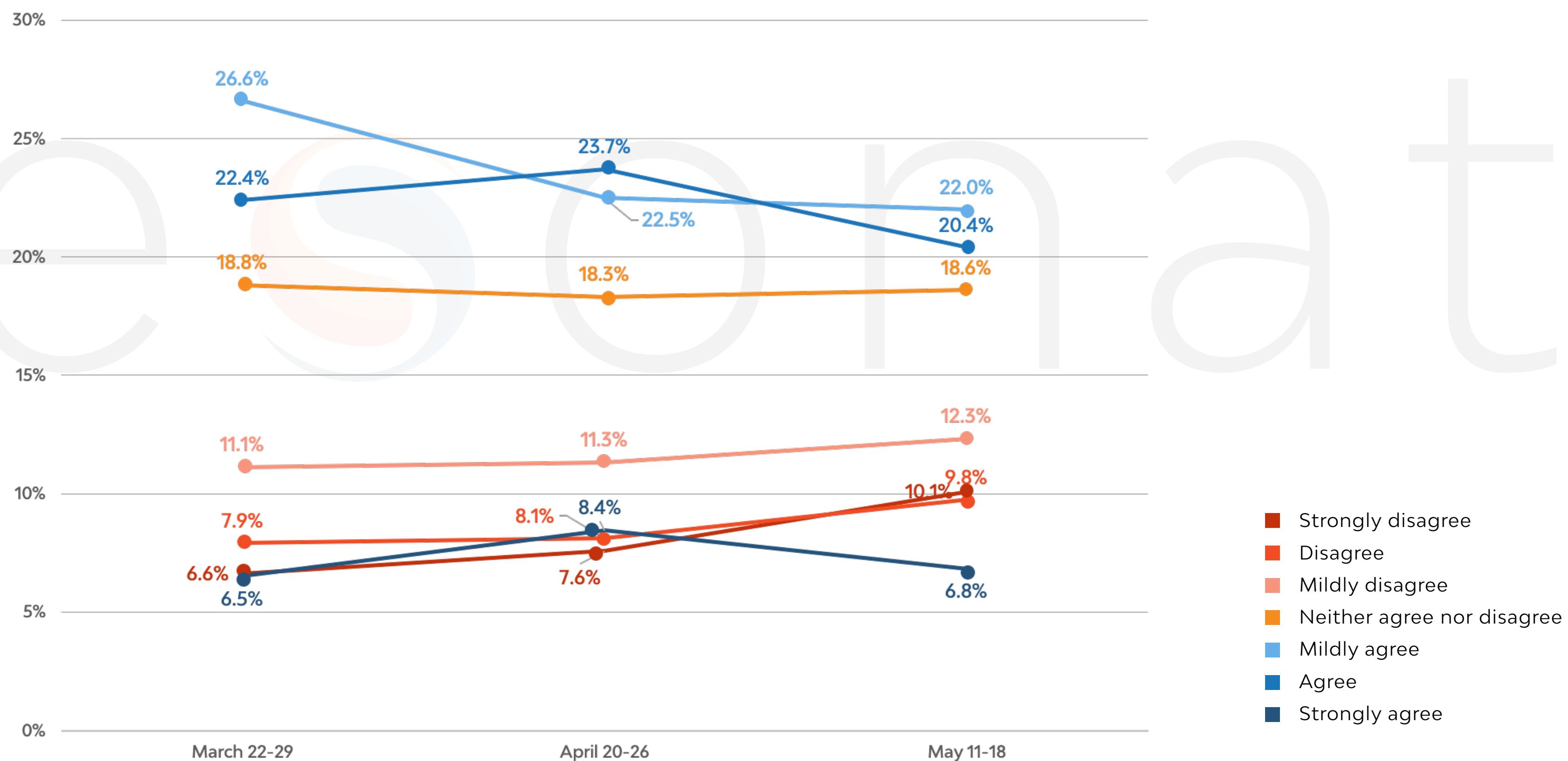
Q43b Federal government is effective in addressing a crisis



POLITICS

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

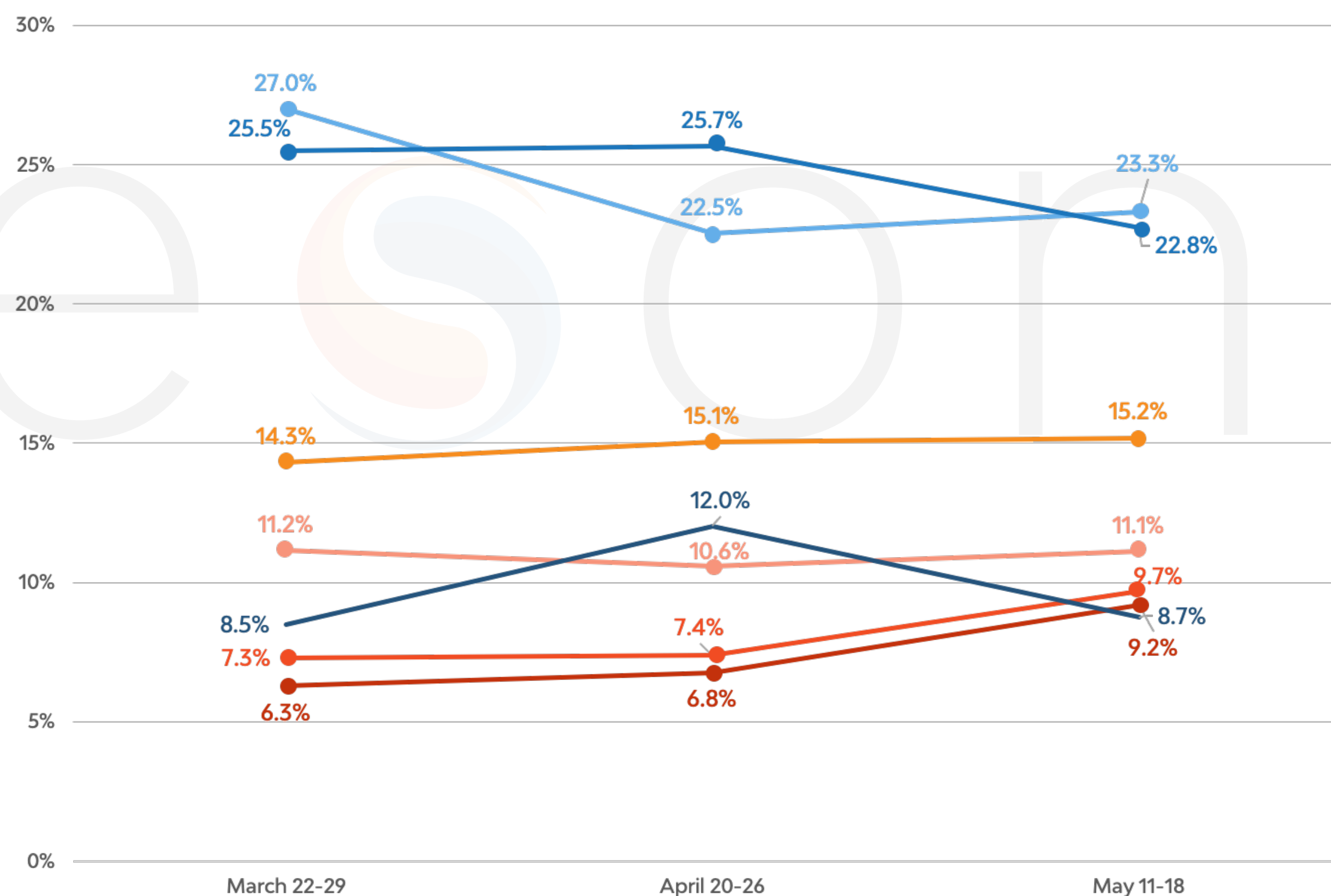
Q43c State and local government can be trusted



POLITICS

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

Q43d State and local government is effective in addressing a crisis

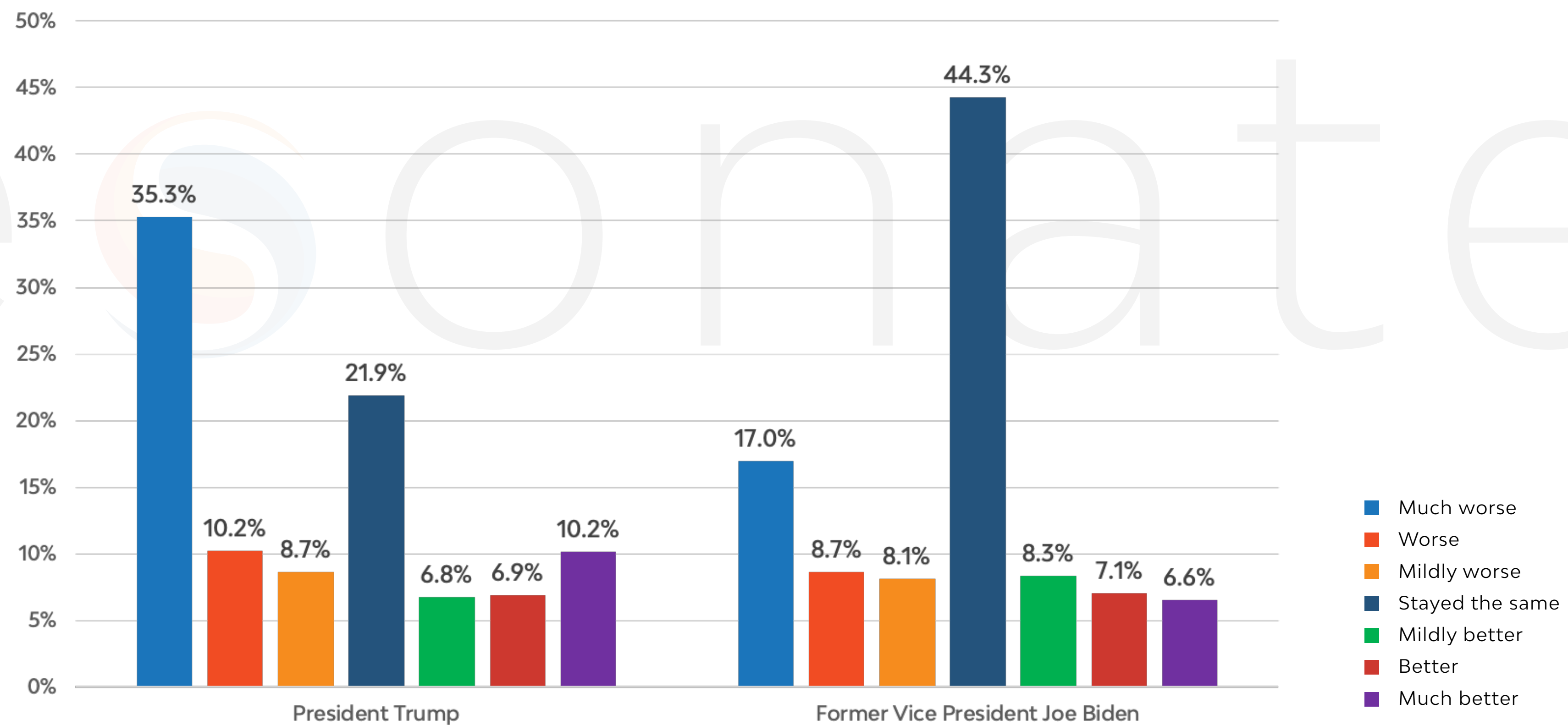


Sentiment that state and local governments are effectively addressing the crisis **peaked in April and began to drop in May**

POLITICS

Q44a-Q44b

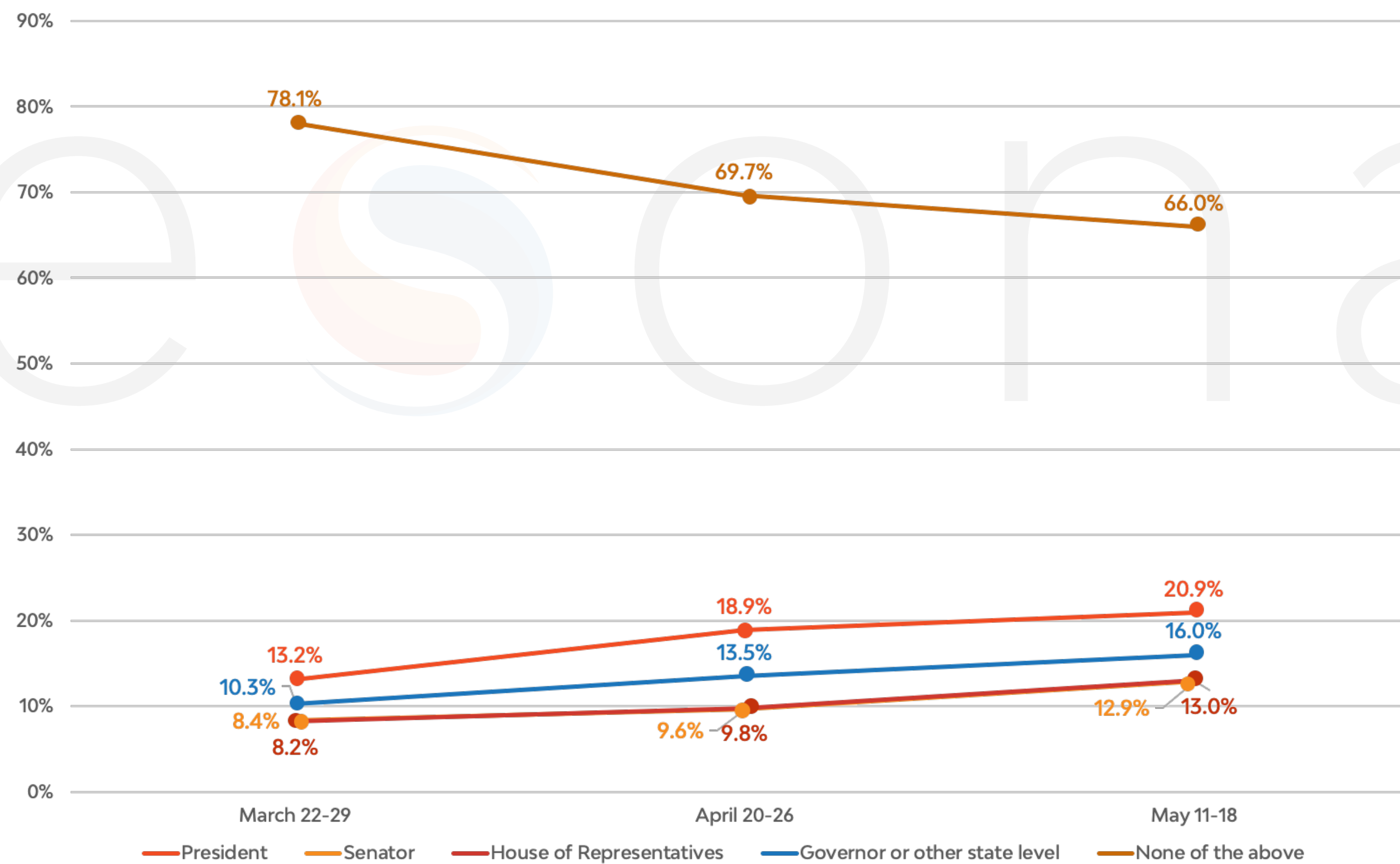
As a result of the coronavirus situation, to what extent has your opinion of the following individuals become better or worse...?



POLITICS

Q45

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

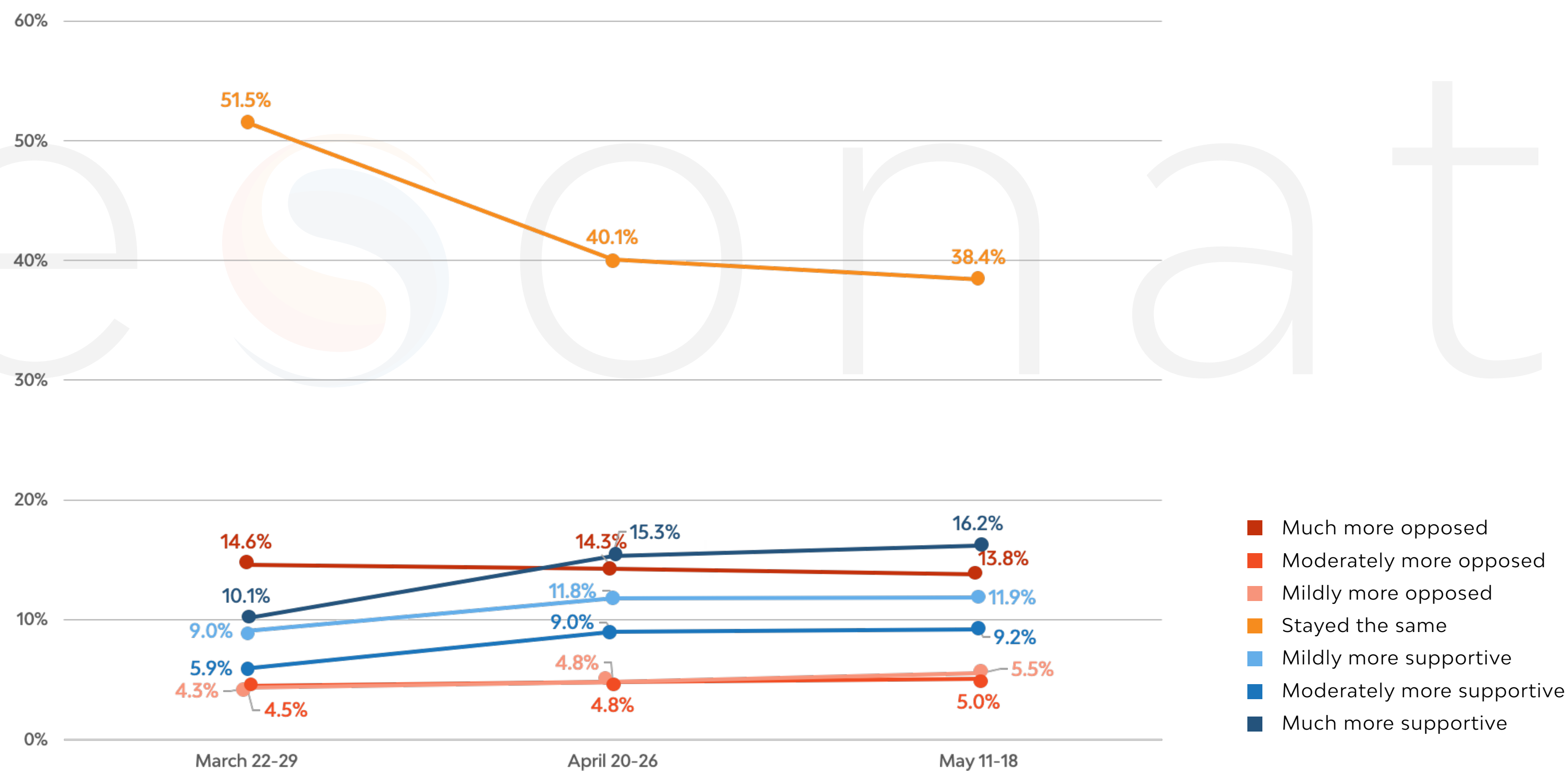


COVID-19 is changing voter opinions up and down the ballot

POLITICS

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

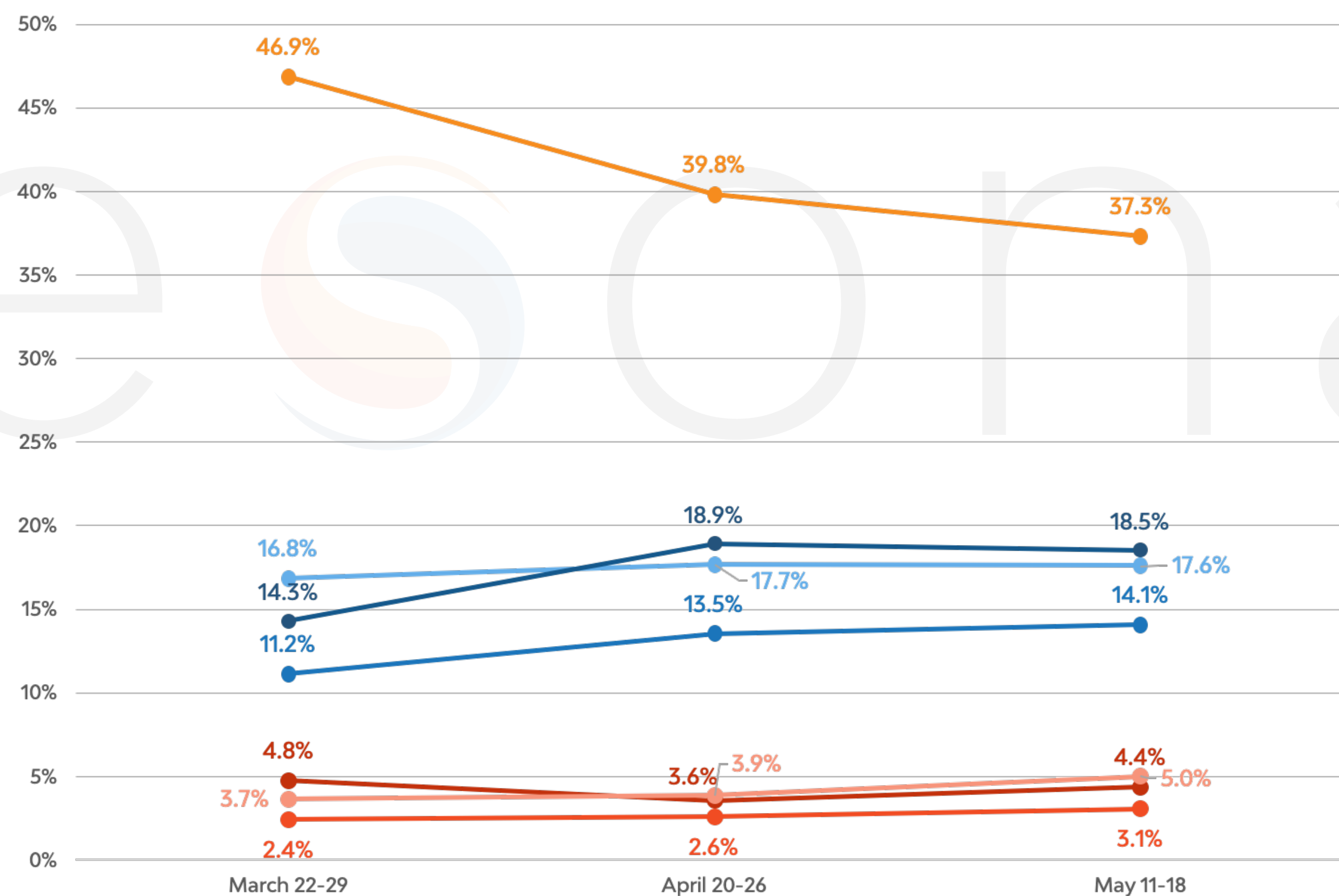
Q46a Replacing all private health insurance with Medicare (i.e., "Medicare for All")



POLITICS

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

Q46b Expanding existing social "safety net" program (e.g., food vouchers, rent subsidies)



22%

Corresponds to a **22% increase** in safety in community and nation as a core value*

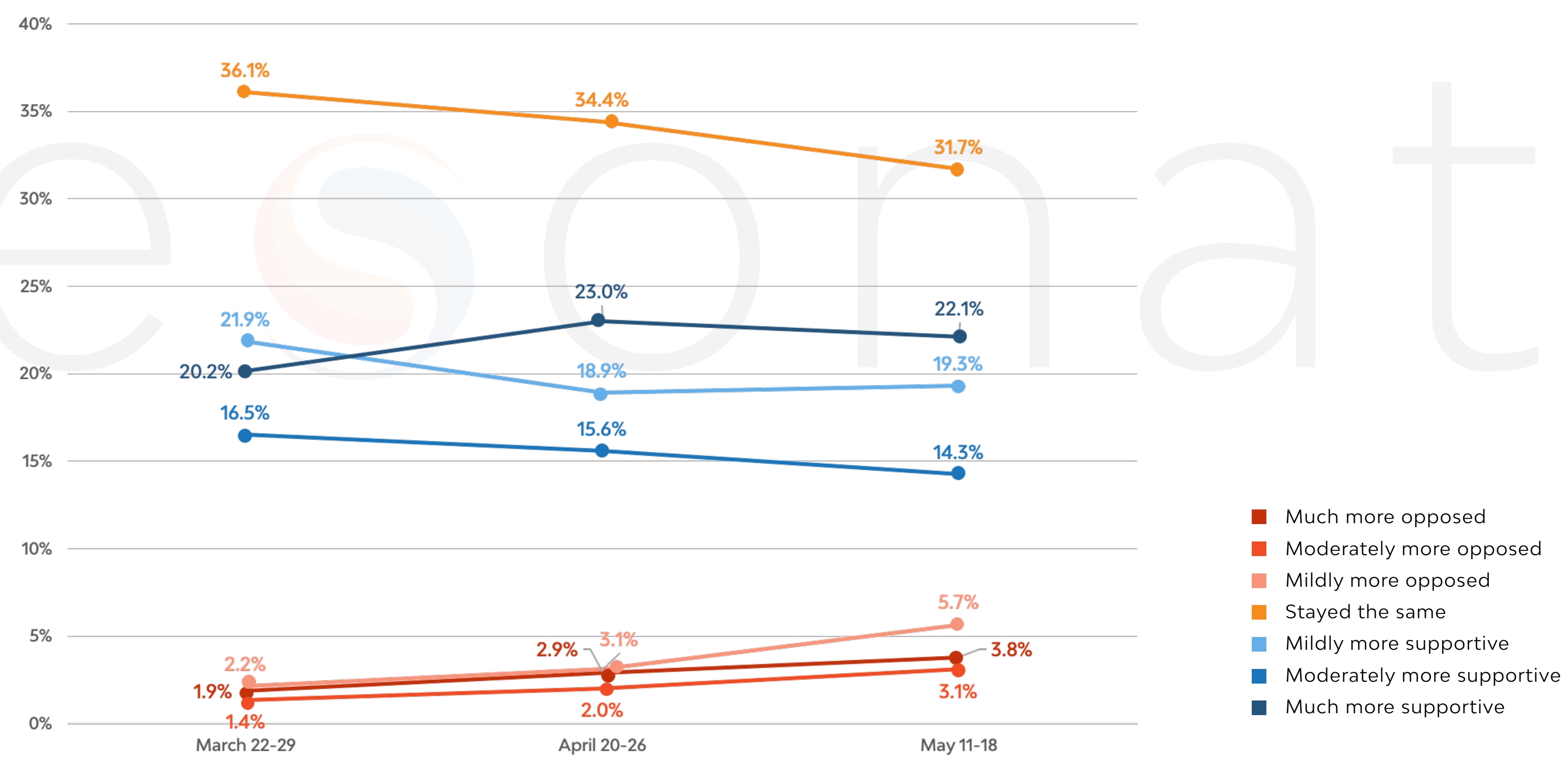
- Much more opposed
- Moderately more opposed
- Mildly more opposed
- Stayed the same
- Mildly more supportive
- Moderately more supportive
- Much more supportive

*Changes in Consumers' Personal Values During the Coronavirus Crisis ©Resonate 2020

POLITICS

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

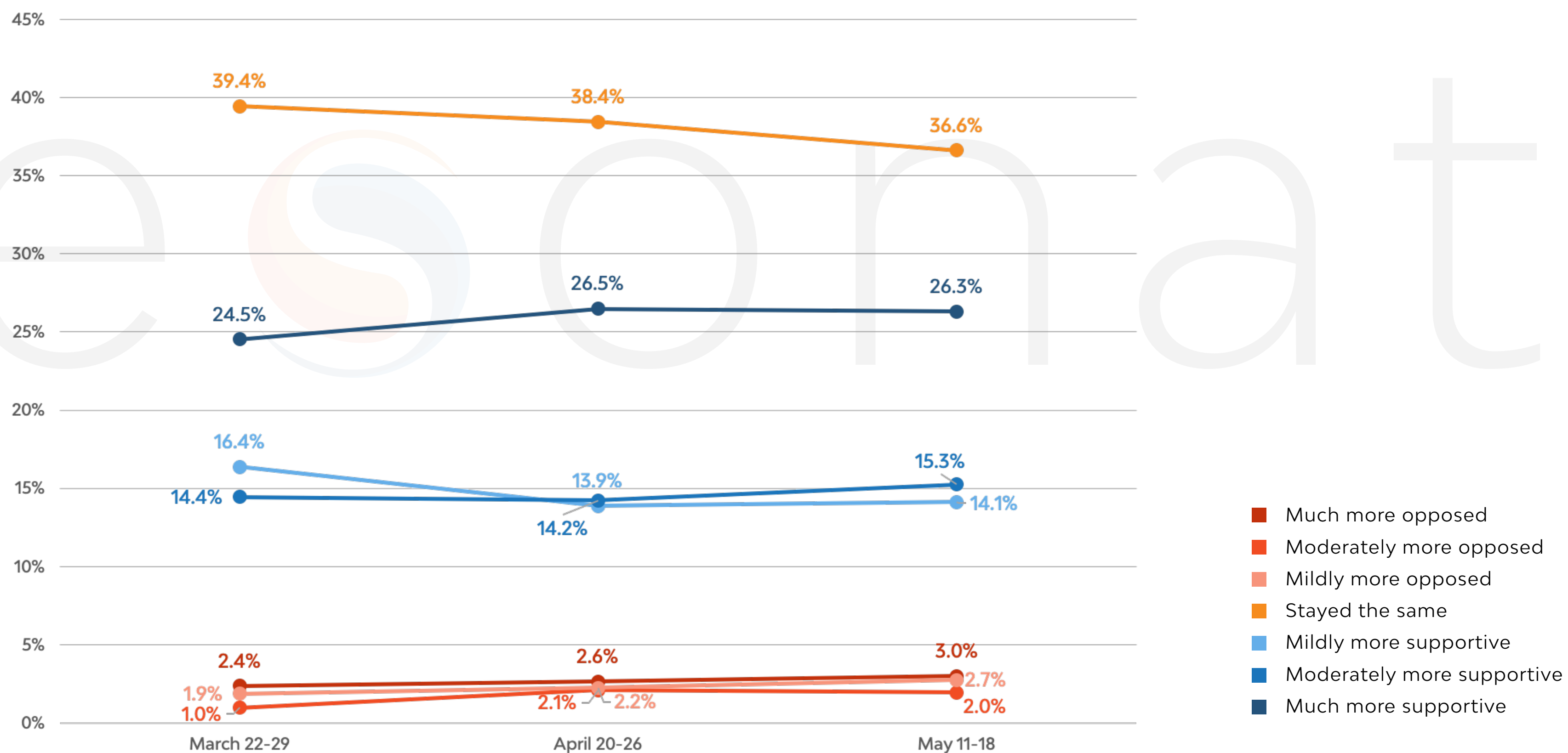
Q46c Enhancing unemployment coverage



POLITICS

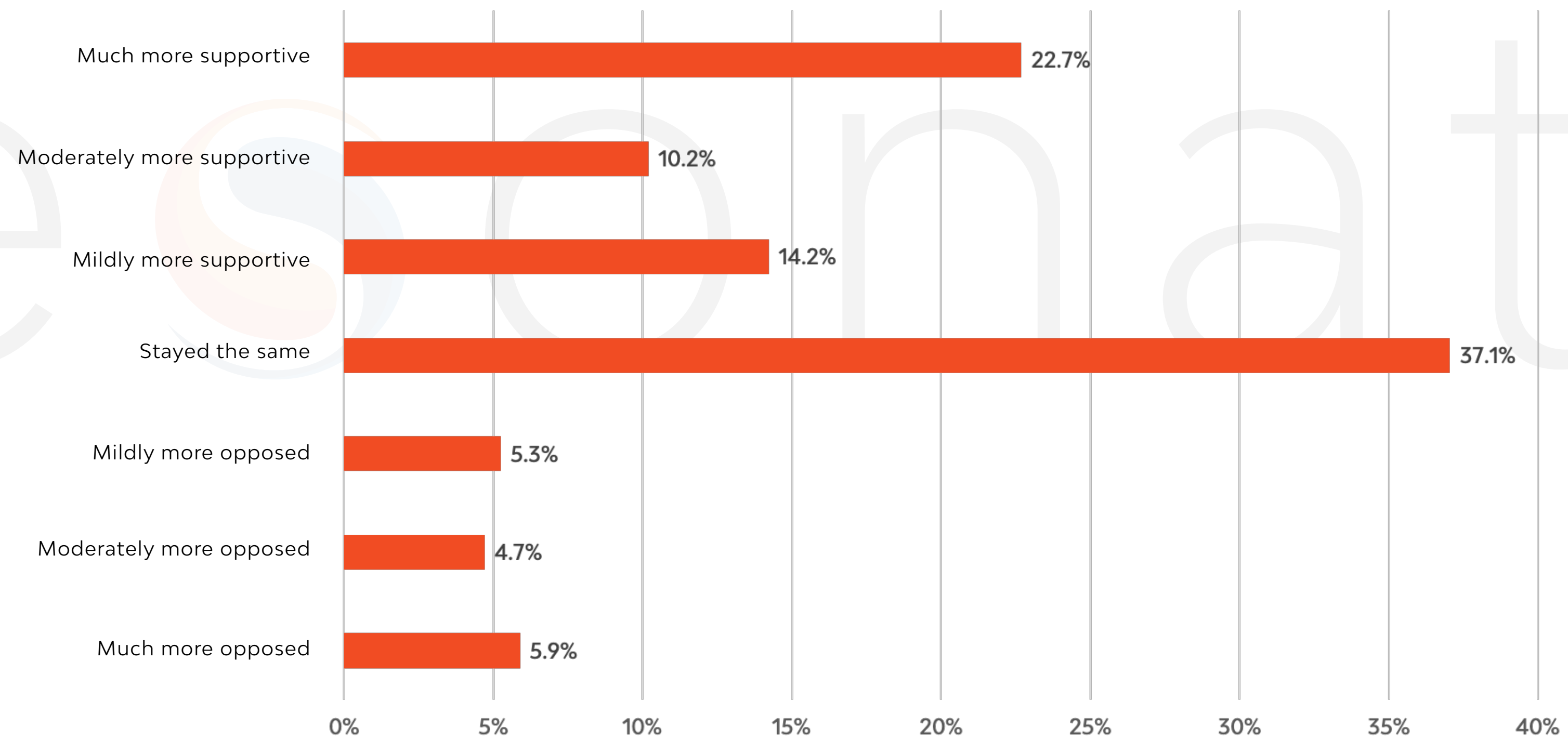
As a result of all you have learned and experienced related to the coronavirus pandemic in this country, how has your opinion toward the following public policies changed... ?

Q46d Enhancing free meal programs in schools



POLITICS

Q47 As a result of all you have learned and experienced related to the coronavirus pandemic in this country, how has your opinion toward closing the United States borders to foreign visitors/immigrants changed... ?



MORE ON COVID-19 AND CONSUMERS

Navigating the unprecedented **COVID-19** crisis, recovery and reopening isn't going to be easy, but we're doing our part to help you chart a new — and successful — path. That's why we're continuing to bring you analysis, webinars and online content that give you insights on how you can leverage Resonate's Ignite Platform, with its consumer data and AI-driven intelligence, to stay engaged with your most loyal consumers and highest-value prospects.

OUR PROPRIETARY DATA SOURCE

Our data is driven by the belief that better understanding leads to better relationships between brands and consumers. We combine the National Consumer Study with direct, online behavioral observations of 10 billion daily events to reveal the deepest, proprietary understanding of the U.S. consumer at scale. We leverage a powerful A.I. platform that dynamically identifies 13,000+ attributes and scales to 200 million U.S. consumer profiles to get at the who, what, when, where and why that drives them. Extend this comprehensive understanding to your own customers with easy onboarding of your data into the Ignite Platform. **See it in action.**

ABOUT RESONATE

Resonate is a pioneer in A.I.-driven consumer data & intelligence. The Resonate Ignite Platform seamlessly enriches any data with the deepest understanding of the U.S. consumer and then integrates into the marketing ecosystem to drive insights into action. Resonate Elements, our proprietary consumer data set, has more than 13,000 attributes, including the Human Element that describes why consumers choose, buy or support certain brands, products or causes. Hundreds of leading brands and agencies use Resonate to better understand their customers and prospects and power decision-making from strategy and execution to drive growth and revenue across the customer lifecycle.

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