RIDING A WAVE OF OPTIMISM

AMERICANS FEELING MORE CONFIDENT NORMAL COULD BE NEAR

Resonate COVID-19 and Emerging Trends Consumer Flash Study, Wave 13, March 2021
Springtime. It’s just around the corner and American consumers are itching to get outside after a year spent riding the waves of pandemic optimism, pessimism, and now, excitement. As of publishing, 107 million doses of the vaccine have been administered and the eagerness to get back to normal is palpable in the air.

Families who’ve spent a year apart are being reunited. Americans are booking plane tickets for summer vacations. And even baseball is set to have fans in stands on opening day.

Overall, consumers are feeling good. They’re returning to restaurants and feeling positive about a return to life as we knew it. But we’re still seeing caution in their actions. Those who are decreasing spending as a result of the pandemic increased slightly from February to March, as did those who are worried to a large extent about the economic consequences of the pandemic.

So, how do you respond to these shifting tides as a marketer? How do you connect with a consumer who, while optimistic about the future, is also managing a roller coaster of hybrid learning for children, while doing their best to sign up an elderly parent for a vaccine?

The reality is, access to the freshest, most relevant data has never been more critical. You need to adjust your messaging in real time in order to form stronger, more meaningful, human connections with your customers.

With Resonate’s proprietary consumer intelligence, you can actively track the behaviors, values, and preferences driving your customers’ decisions now — not where they were last month.

These are the insights you need to inform marketing, CX, product development, and more, particularly during a time when every decision could be the difference between sink or swim.

That’s why Resonate coronavirus and current events data is released continuously, with new reports like this one coming out every few weeks. This latest Recent Events Connected Flash Study was fielded between February 22 and March 10, 2021 and scaled to 200 million U.S. consumers.
KEY TAKEAWAYS

WHAT’S CHANGED IN JUST A MONTH...

- Optimism is increasing as we head into spring. Those who believe life will either never return to normal or return to normal in over a year decreased by 4.3 percentage points in March. **Slide 4**

- Americans are worrying less about their health. The number of people who responded they were worried about the health consequences of the pandemic to an extremely large extent dropped by 2.7 percentage points in March. **Slide 5**

- In vaccines we trust. Those completely likely to get the vaccine has increased 19.2 percentage points since November and increased 3.1 percentage points since February. **Slide 12**

- Getting OUT! Americans who said they would not travel until the pandemic is under control has dropped 4.6 points for in-state travel and 4 points for travel to nearby states. **Slides 19-20**

- Contactless is catching on. Consumers very or completely likely to use contactless payments as a result of the coronavirus pandemic has increased 2.8 percentage points from February to March. **Slide 29**

- Financially stabilizing? Americans who rate the current state of the U.S. economy as “fair” rose by 8 percentage points since the beginning of the year. **Slide 8**

- Consumers are still feeling cautious. Those who have increased their saving to a large extent increased by 1.7 percentage points from February to March. **Slide 24**

- Good news ahead. Consumers who describe themselves as living comfortably financial has increased by 2.1 percentage points from February to March. **Slide 31**

- Convenience reigns? Despite optimism to get back to normal, consumers are increasing their likelihood to order groceries online by 3.5 percentage points from February to March. **Slide 33**

- Treat yourself to dinner out. Consumers who are dining in at restaurants at least once a month has increased 4.4 percentage points from February to March. **Slide 40**

- Retail trends here to stay! After a slight dip in February, curbside pick-up as an important shopping factor for consumers increased by 4.4 percentage points in March. **Slide 42**

Resonate COVID-19 and Emerging Trends Consumer Flash Study, Wave 13, March 2021
Thinking about the coronavirus situation, how soon do you believe that your life will largely return to normal?

- 1 month or less
- 2 to 3 months
- 4 to 6 months
- 7 to 12 months
- More than 1 year
- Never

Resonate COVID-19 and Emerging Trends Consumer Flash Study, Wave 13, March 2021
Overall, to what extent are you concerned about the health-related consequences of the coronavirus situation?

-2.7 pts concerned about the health consequences to an extremely large extent

<table>
<thead>
<tr>
<th>Month</th>
<th>To an extremely small extent</th>
<th>To a very small extent</th>
<th>To a small extent</th>
<th>To a moderate extent</th>
<th>To a large extent</th>
<th>To a very large extent</th>
<th>To an extremely large extent</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 22-29</td>
<td>9.5%</td>
<td>9.7%</td>
<td>10.7%</td>
<td>10.9%</td>
<td>10.3%</td>
<td>9.7%</td>
<td>10.6%</td>
</tr>
<tr>
<td>April 20-26</td>
<td>3.0%</td>
<td>4.0%</td>
<td>5.1%</td>
<td>6.2%</td>
<td>6.8%</td>
<td>5.1%</td>
<td>6.8%</td>
</tr>
<tr>
<td>May 11-18</td>
<td>4.3%</td>
<td>5.1%</td>
<td>6.2%</td>
<td>6.8%</td>
<td>7.3%</td>
<td>6.8%</td>
<td>8.5%</td>
</tr>
<tr>
<td>June 8-14</td>
<td>1.7%</td>
<td>4.0%</td>
<td>5.1%</td>
<td>6.2%</td>
<td>7.3%</td>
<td>6.8%</td>
<td>8.5%</td>
</tr>
<tr>
<td>June 29-July 6</td>
<td>21.4%</td>
<td>20.7%</td>
<td>17.9%</td>
<td>17.5%</td>
<td>16.8%</td>
<td>17.3%</td>
<td>17.0%</td>
</tr>
<tr>
<td>July 22-28</td>
<td>21.4%</td>
<td>20.7%</td>
<td>17.9%</td>
<td>17.5%</td>
<td>16.8%</td>
<td>17.3%</td>
<td>17.0%</td>
</tr>
<tr>
<td>August 11-18</td>
<td>19.4%</td>
<td>18.0%</td>
<td>17.2%</td>
<td>17.8%</td>
<td>18.7%</td>
<td>19.3%</td>
<td>17.8%</td>
</tr>
<tr>
<td>Sept 15-21</td>
<td>20.6%</td>
<td>20.4%</td>
<td>19.3%</td>
<td>22.3%</td>
<td>19.3%</td>
<td>22.3%</td>
<td>19.3%</td>
</tr>
<tr>
<td>Oct 5-13</td>
<td>20.9%</td>
<td>20.8%</td>
<td>20.9%</td>
<td>18.9%</td>
<td>17.1%</td>
<td>17.1%</td>
<td>17.1%</td>
</tr>
<tr>
<td>Nov 23-Dec 14</td>
<td>20.4%</td>
<td>20.0%</td>
<td>20.5%</td>
<td>20.0%</td>
<td>20.0%</td>
<td>20.0%</td>
<td>20.0%</td>
</tr>
<tr>
<td>Dec 15-Jan 6</td>
<td>21.5%</td>
<td>21.7%</td>
<td>21.7%</td>
<td>19.1%</td>
<td>19.1%</td>
<td>19.1%</td>
<td>19.1%</td>
</tr>
<tr>
<td>Jan 2-16</td>
<td>18.8%</td>
<td>18.8%</td>
<td>17.5%</td>
<td>16.0%</td>
<td>16.0%</td>
<td>16.0%</td>
<td>16.0%</td>
</tr>
<tr>
<td>Feb 22-Mar 10</td>
<td>17.0%</td>
<td>16.4%</td>
<td>11.5%</td>
<td>11.0%</td>
<td>11.0%</td>
<td>11.0%</td>
<td>11.0%</td>
</tr>
</tbody>
</table>
Overall, to what extent are you concerned about the economic-related consequences of the coronavirus situation?
When do you believe the United States economy will return to "normal," as it was before the coronavirus situation began?
What is the current quality of the United States economy?

- **Very poor**
- **Poor**
- **Fair**
- **Good**
- **Excellent**

-5.7 pts from Dec. to March, consumers who believe economy is poor

- 42.9% Very poor from Feb 22-Mar 10
- 36.4% Poor from Feb 22-Mar 10
- 34.9% Fair from Feb 22-Mar 10
- 39.3% Good from Feb 22-Mar 10
- 38.4% Excellent from Feb 22-Mar 10

- 31.2% Very poor from August 11-18
- 26.7% Poor from August 11-18
- 25.0% Fair from August 11-18
- 29.0% Good from August 11-18
- 38.7% Excellent from August 11-18

Graph shows the distribution of consumer views on the United States economy from August 11-18 to February 22-Mar 10, with a decrease of 5.7 points from December to March.
Which of the following best describes your employment status?

- I am currently employed full time/part time
- I was previously employed but became unemployed / furloughed since March 1
- I have been unemployed/retired since before March 1
Which of the following best describes your work situation?

- My job has always been “work from home”
- The nature of my work does not allow me to stay at home
- My company has required employees to work from home
- My company has required employees to return to work in the company’s office
- My company has offered employees a voluntary option to work from home, and I plan to work in the company’s office on all or most days
- My company has offered employees a voluntary option to work from home, and I plan to work from home on all or most days
Which of the following statements best describes the current status of coronavirus restrictions in your state?

<table>
<thead>
<tr>
<th>Date</th>
<th>No or very few restrictions</th>
<th>Some restrictions</th>
<th>Many restrictions</th>
</tr>
</thead>
<tbody>
<tr>
<td>June 29-July 6</td>
<td>72.3%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>July 22-28</td>
<td>67.4%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>August 11-18</td>
<td>71.2%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Sept 15-21</td>
<td>69.9%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Oct 5-13</td>
<td>69.4%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Nov 23-Dec 14</td>
<td>58.3%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Dec 15-Jan 6</td>
<td>59.4%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Jan 2-16</td>
<td>67.5%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Feb 22-Mar 10</td>
<td>69.6%</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

- No or very few restrictions (i.e., our state is “open”)
- Some restrictions
- Many restrictions (i.e., our state has a “shelter in place” or “stay home” requirement in force)
How likely are you to take the coronavirus vaccine, after it becomes available?

- Not at all likely
- Slightly likely
- Moderately likely
- Very likely
- Completely likely

Resonate COVID-19 and Emerging Trends Consumer Flash Study, Wave 13, March 2021
How soon after the vaccine for the coronavirus becomes available will you want to take it?

- Within one week of its availability
- Within one month of its availability
- Within three months of its availability
- Within six months of its availability
- Within one year of its availability or later
- Never

Resonate COVID-19 and Emerging Trends Consumer Flash Study, Wave 13, March 2021

+2.2 pts will get the vaccine within one week of availability

<table>
<thead>
<tr>
<th>Time</th>
<th>Within one week of its availability</th>
<th>Within one month of its availability</th>
<th>Within three months of its availability</th>
<th>Within six months of its availability</th>
<th>Within one year of its availability or later</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nov 23-Dec 14</td>
<td>1.1%</td>
<td>15.7%</td>
<td>16.6%</td>
<td>16.6%</td>
<td>9.9%</td>
<td>11.5%</td>
</tr>
<tr>
<td>Dec 15-Jan 6</td>
<td>1.3%</td>
<td>15.9%</td>
<td>20.9%</td>
<td>18.1%</td>
<td>7.4%</td>
<td>12.6%</td>
</tr>
<tr>
<td>Feb 2-16</td>
<td>1.5%</td>
<td>17.1%</td>
<td>20.6%</td>
<td>18.1%</td>
<td>7.9%</td>
<td>12%</td>
</tr>
<tr>
<td>Feb 22-Mar 10</td>
<td>1.2%</td>
<td>14.2%</td>
<td>16.9%</td>
<td>16.9%</td>
<td>9.8%</td>
<td>12.1%</td>
</tr>
</tbody>
</table>
When do you anticipate that a vaccine for the coronavirus will become available to the general public?

- January to March, 2021: 20.6% (Feb 2-16), 19.7% (Feb 22-Mar 10)
- April to June, 2021: 36.4% (Feb 2-16), 37.9% (Feb 22-Mar 10)
- July to September, 2021: 28.8% (Feb 2-16), 29.1% (Feb 22-Mar 10)
- October, 2021 or later: 14.2% (Feb 2-16), 13.3% (Feb 22-Mar 10)
Which of the following are necessary to take place for your travel (both leisure and business) to return to normal?

- Friends and family already traveling
- All staff wear masks/gloves
- All passengers wear masks/gloves
- Reduced occupancy on flights/trains
- Temperature checks before boarding
- Cleaning between usage
- None of the above

---|---|---|---|---|---|---|---|---|---|---
12.6% | 14.6% | 12.3% | 15.4% | 12.5% | 14.8% | 13.8% | 14.8% | 13.1% | 14.7% | 14.5%
20.1% | 21.7% | 16.9% | 22.6% | 23.3% | 25.4% | 22.7% | 24.4% | 23.7% | 23.7% | 22.4%
How frequently will you visit a theme park (e.g., Universal Studios, Disney World, Six Flags, etc.), when all the restrictions in your state related to the coronavirus situation were/are removed?
How frequently are you now traveling on an airplane or train?

- **More than once a week**
  - August 11-18: 48.2%
  - Sept 15-21: 34.8%
  - Oct 5-13: 34.6%
  - Nov 23-Dec 14: 39.1%
  - Dec 15-Jan 6: 41.4%
  - Jan 7-Feb 16: 38.6%
  - Feb 22-Mar 10: 36.4%

- **Once a week**
  - August 11-18: 20.9%
  - Sept 15-21: 9.2%
  - Oct 5-13: 13.2%
  - Nov 23-Dec 14: 20.2%
  - Dec 15-Jan 6: 17.1%
  - Jan 7-Feb 16: 12.4%
  - Feb 22-Mar 10: 20.2%

- **Once a month**
  - August 11-18: 7.5%
  - Sept 15-21: 6.0%
  - Oct 5-13: 0.4%
  - Nov 23-Dec 14: 1.4%
  - Dec 15-Jan 6: 1.0%
  - Jan 7-Feb 16: 1.0%
  - Feb 22-Mar 10: 0.8%

- **Once a quarter**
  - August 11-18: 1.1%
  - Sept 15-21: 3.2%
  - Oct 5-13: 2.2%
  - Nov 23-Dec 14: 2.4%
  - Dec 15-Jan 6: 2.4%
  - Jan 7-Feb 16: 2.4%
  - Feb 22-Mar 10: 2.4%

- **Once a year**
  - August 11-18: 6.6%
  - Sept 15-21: 1.6%
  - Oct 5-13: 1.2%
  - Nov 23-Dec 14: 7.2%
  - Dec 15-Jan 6: 2.2%
  - Jan 7-Feb 16: 0.6%
  - Feb 22-Mar 10: 0.0%

- **Less than once a year**
  - August 11-18: 5.0%
  - Sept 15-21: 8.0%
  - Oct 5-13: 7.2%
  - Nov 23-Dec 14: 2.4%
  - Dec 15-Jan 6: 2.2%
  - Jan 7-Feb 16: 0.0%
  - Feb 22-Mar 10: 2.4%

- **Never**
  - August 11-18: 2.2%
  - Sept 15-21: 1.4%
  - Oct 5-13: 1.0%
  - Nov 23-Dec 14: 6.1%
  - Dec 15-Jan 6: 7.5%
  - Jan 7-Feb 16: 6.2%
  - Feb 22-Mar 10: 7.9%

- **Not applicable: I do not travel on airplanes or trains anyway**
  - August 11-18: 5.0%
  - Sept 15-21: 6.0%
  - Oct 5-13: 7.2%
  - Nov 23-Dec 14: 2.4%
  - Dec 15-Jan 6: 2.4%
  - Jan 7-Feb 16: 2.4%
  - Feb 22-Mar 10: 1.3%

- **Not traveling at all, until the coronavirus situation is under control**
  - August 11-18: 5.0%
  - Sept 15-21: 6.0%
  - Oct 5-13: 7.2%
  - Nov 23-Dec 14: 2.4%
  - Dec 15-Jan 6: 2.4%
  - Jan 7-Feb 16: 2.4%
  - Feb 22-Mar 10: 7.9%

Resonate COVID-19 and Emerging Trends Consumer Flash Study, Wave 13, March 2021
TRAVEL & TRANSPORTATION

How frequently are you now staying at a large hotel chain?

-1.6pts not staying at a large hotel chain

More than once a week
- Once a week
- Once a month
- Once a year
- Never
- Not applicable: I do not stay at large hotel chains anyway

Resonate COVID-19 and Emerging Trends Consumer Flash Study, Wave 13, March 2021
How frequently are you now traveling within your state?

- More than once a week
- Once a week
- Once a month
- Once a quarter
- Once a year
- Less than once a year
- Never
- Not applicable: I do not travel within my state anyway

Resonate COVID-19 and Emerging Trends Consumer Flash Study, Wave 13, March 2021

-4.6 pts not traveling in-state
How frequently are you now traveling to a different state?

- More than once a week
- Once a week
- Once a month
- Once a year
- Never
- Not traveling to nearby states at all, until the coronavirus situation is under control
- Not applicable: I do not travel to nearby states anyway

Resonate COVID-19 and Emerging Trends Consumer Flash Study, Wave 13, March 2021
How frequently are you now **traveling internationally**?

- **More than once a week**
- **Once a week**
- **Once a month**
- **Once a quarter**
- **Less than once a year**
- **Once a year**
- **Never**
- **Not traveling internationally at all, until the coronavirus situation is under control**

---

Resonate COVID-19 and Emerging Trends Consumer Flash Study, Wave 13, March 2021
Thinking about the coronavirus situation, how soon do you expect your leisure travel activities will largely return to "normal"?

- Winter (November - February), 2020
- Spring (March - May), 2021
- Summer (June - August), 2021
- Fall (September - October), 2021 or later

Resonate COVID-19 and Emerging Trends Consumer Flash Study, Wave 13, March 2021
Thinking about the coronavirus situation, how soon do you expect your business travel activities will largely return to "normal"?

- Winter (November - February), 2020: 5.7%
- Spring (March - May), 2021: 4.9%
- Summer (June - August), 2021: 3.9%
- Fall (September - October), 2021 or later: 3.3%

Resonate COVID-19 and Emerging Trends Consumer Flash Study, Wave 13, March 2021
As a result of the coronavirus situation, how have you changed your financial habit of saving?

**FINANCIAL**

Percentage of respondents reporting changes in their financial habits from August 11-18 to February 22-March 10.

- **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**

*Resonate COVID-19 and Emerging Trends Consumer Flash Study, Wave 13, March 2021*
As a result of the coronavirus situation, how have you changed your financial habit of spending?

- 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

Resonate COVID-19 and Emerging Trends Consumer Flash Study, Wave 13, March 2021
As a result of the coronavirus situation, how have you changed your financial habit of budgeting and monitoring expenses?

- 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

Resonate COVID-19 and Emerging Trends Consumer Flash Study, Wave 13, March 2021
As a result of the coronavirus situation, how have you changed your financial habit of:

- **investing for retirement**

### Results

<table>
<thead>
<tr>
<th>Month</th>
<th>Increase to a large extent</th>
<th>Increase to a moderate extent</th>
<th>Increase to a small extent</th>
<th>Decrease to a small extent</th>
<th>Decrease to a moderate extent</th>
<th>Decrease to a large extent</th>
<th>Remain about the same</th>
</tr>
</thead>
<tbody>
<tr>
<td>August 11-18</td>
<td>3.5%</td>
<td>4.8%</td>
<td>2.4%</td>
<td>2.5%</td>
<td>6.4%</td>
<td>8.7%</td>
<td>15.1%</td>
</tr>
<tr>
<td>Sept 15-21</td>
<td>3.3%</td>
<td>5.5%</td>
<td>6.7%</td>
<td>5.1%</td>
<td>6.8%</td>
<td>6.9%</td>
<td>14.8%</td>
</tr>
<tr>
<td>Oct 5-13</td>
<td>6.8%</td>
<td>5.1%</td>
<td>1.8%</td>
<td>5.1%</td>
<td>6.6%</td>
<td>6.6%</td>
<td>13.7%</td>
</tr>
<tr>
<td>Nov 25-Dec 14</td>
<td>3.1%</td>
<td>5.9%</td>
<td>2.8%</td>
<td>1.9%</td>
<td>7.0%</td>
<td>6.1%</td>
<td>17.5%</td>
</tr>
<tr>
<td>Dec 15-Jan 6</td>
<td>3.9%</td>
<td>5.6%</td>
<td>6.1%</td>
<td>2.8%</td>
<td>6.1%</td>
<td>7.7%</td>
<td>17.1%</td>
</tr>
<tr>
<td>Feb 2-16</td>
<td>3.9%</td>
<td>8.9%</td>
<td>6.1%</td>
<td>3.9%</td>
<td>6.1%</td>
<td>8.6%</td>
<td>12.7%</td>
</tr>
<tr>
<td>Feb 22-Mar 10</td>
<td>2.6%</td>
<td>4.8%</td>
<td>12.4%</td>
<td>3.8%</td>
<td>6.6%</td>
<td>6.6%</td>
<td>3.8%</td>
</tr>
</tbody>
</table>

### Additional Information

- **© Resonate. All rights reserved. Proprietary & Confidential. resonate.com**
How likely are you to **apply for a new credit card**, because of the coronavirus situation?

Resonate COVID-19 and Emerging Trends Consumer Flash Study, Wave 13, March 2021
How likely are you now to use contactless payments (e.g., "tap-and-go" credit cards, Apple Pay, Google Wallet) for purchases, because of the coronavirus situation?

![Graph showing the likelihood of using contactless payments over time. The graph indicates a general increase in likelihood, with a peak in March 2021.](resonate.com)
How likely were you to use contactless payments (e.g., "tap-and-go" credit cards, Apple Pay, Google Wallet) for purchases, before the onset of the coronavirus situation?

- Not at all likely
- Slightly likely
- Moderately likely
- Very likely
- Completely likely

Resonate COVID-19 and Emerging Trends Consumer Flash Study, Wave 13, March 2021
Which of the following statements best describes your own personal financial situation?

- "Times are hard:" struggling to pay for necessities
- "Getting by:" able to pay for necessities, with maybe a little money left over
- "Living comfortably:" more than able to pay for necessities, with a cushion of money in reserve

-1.6 pts personal financial situation described as "times are hard"
To what extent are you worried about your own household's financial situation?

August 11-18: Not at all worried = 12.8%, Slightly worried = 12.3%, Moderately worried = 18.1%, Very worried = 11.8%

Sept 15-21: Not at all worried = 11.2%, Slightly worried = 12.6%, Moderately worried = 18.1%, Very worried = 11.6%

Oct 5-13: Not at all worried = 11.6%, Slightly worried = 12.4%, Moderately worried = 18.5%, Very worried = 12.4%

Nov 23-Dec 14: Not at all worried = 11.7%, Slightly worried = 12.9%, Moderately worried = 18.5%, Very worried = 12.2%

Dec 15-Jan 6: Not at all worried = 10.2%, Slightly worried = 12.2%, Moderately worried = 18.5%, Very worried = 11.4%

Feb 2-16: Not at all worried = 9.2%, Slightly worried = 12.6%, Moderately worried = 18.1%, Very worried = 12.2%

Feb 22-Mar 10: Not at all worried = 9.5%, Slightly worried = 12.6%, Moderately worried = 18.1%, Very worried = 12.2%
As a result of the coronavirus situation, to what extent has your likelihood to do each of the following changed:

order groceries online

- Decreased to a large extent
- Decreased to a moderate extent
- Decreased to a small extent
- Stayed the same
- Increased to a small extent
- Increased to a moderate extent
- Increased to a large extent

Resonate COVID-19 and Emerging Trends Consumer Flash Study, Wave 13, March 2021
As a result of the coronavirus situation, to what extent has your likelihood to do each of the following changed:

- purchase a "luxury" product (e.g., fine jewelry, designer clothing)

**Changes in Likelihood to Purchase Luxury Products**

- Decreased to a large extent
- Decreased to a moderate extent
- Decreased to a small extent
- Stayed the same
- Increased to a small extent
- Increased to a moderate extent
- Increased to a large extent
As a result of the coronavirus situation, to what extent has your likelihood to do each of the following changed:
make a major purchase (e.g., an automobile)
As a result of the coronavirus situation, to what extent has your likelihood to do each of the following changed: order food or takeout for delivery?

<table>
<thead>
<tr>
<th>Date</th>
<th>Decreased to a large extent</th>
<th>Decreased to a moderate extent</th>
<th>Decreased to a small extent</th>
<th>Stayed the same</th>
<th>Increased to a small extent</th>
<th>Increased to a moderate extent</th>
<th>Increased to a large extent</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 22-29</td>
<td>12.1%</td>
<td>10.8%</td>
<td>6.4%</td>
<td>4.5%</td>
<td>12.1%</td>
<td>9.4%</td>
<td>4.5%</td>
</tr>
<tr>
<td>April 20-26</td>
<td>10.8%</td>
<td>9.4%</td>
<td>4.5%</td>
<td>4.1%</td>
<td>10.8%</td>
<td>8.1%</td>
<td>4.1%</td>
</tr>
<tr>
<td>May 11-18</td>
<td>9.4%</td>
<td>8.1%</td>
<td>4.1%</td>
<td>3.7%</td>
<td>9.4%</td>
<td>6.9%</td>
<td>3.7%</td>
</tr>
<tr>
<td>June 8-14</td>
<td>8.1%</td>
<td>6.9%</td>
<td>3.7%</td>
<td>3.3%</td>
<td>8.1%</td>
<td>5.9%</td>
<td>3.3%</td>
</tr>
<tr>
<td>June 29-July 6</td>
<td>6.9%</td>
<td>5.9%</td>
<td>3.3%</td>
<td>3.0%</td>
<td>6.9%</td>
<td>5.2%</td>
<td>3.0%</td>
</tr>
<tr>
<td>July 22-28</td>
<td>5.9%</td>
<td>5.2%</td>
<td>3.0%</td>
<td>2.7%</td>
<td>5.9%</td>
<td>4.3%</td>
<td>2.7%</td>
</tr>
<tr>
<td>August 11-18</td>
<td>5.2%</td>
<td>4.3%</td>
<td>2.7%</td>
<td>2.4%</td>
<td>5.2%</td>
<td>4.0%</td>
<td>2.4%</td>
</tr>
<tr>
<td>Sept 15-21</td>
<td>4.3%</td>
<td>4.0%</td>
<td>2.4%</td>
<td>2.2%</td>
<td>4.3%</td>
<td>3.3%</td>
<td>2.2%</td>
</tr>
<tr>
<td>Oct 5-13</td>
<td>4.0%</td>
<td>3.3%</td>
<td>2.2%</td>
<td>2.0%</td>
<td>4.0%</td>
<td>3.1%</td>
<td>2.0%</td>
</tr>
<tr>
<td>Nov 23-Dec 14</td>
<td>3.3%</td>
<td>3.1%</td>
<td>2.0%</td>
<td>1.8%</td>
<td>3.3%</td>
<td>2.7%</td>
<td>1.8%</td>
</tr>
<tr>
<td>Dec 15-Jan 6</td>
<td>3.1%</td>
<td>2.7%</td>
<td>1.8%</td>
<td>1.6%</td>
<td>3.1%</td>
<td>2.5%</td>
<td>1.6%</td>
</tr>
<tr>
<td>Feb 2-16</td>
<td>2.7%</td>
<td>2.5%</td>
<td>1.6%</td>
<td>1.4%</td>
<td>2.7%</td>
<td>2.2%</td>
<td>1.4%</td>
</tr>
<tr>
<td>Feb 22-Mar 10</td>
<td>2.5%</td>
<td>2.2%</td>
<td>1.4%</td>
<td>1.2%</td>
<td>2.5%</td>
<td>2.0%</td>
<td>1.2%</td>
</tr>
</tbody>
</table>

Resonate COVID-19 and Emerging Trends Consumer Flash Study, Wave 13, March 2021
Now that stores and locations are open, which of the following types of activities or shopping will you now primarily do in a physical location, rather than online? Please select all that apply.

- Restaurants
- Electronics
- Grocers
- Clothing
- General merchandise (e.g., Walmart, Target, Costco)
- Hardware/building supplies
- None of the above
- Bank

+3.4 pts shopping in-person at general merchandise stores

Resonate COVID-19 and Emerging Trends Consumer Flash Study, Wave 13, March 2021
Which of the following would be required in order for you to return to shopping from stores once shops open?

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Reduce occupancy of shops</td>
<td>50.0%</td>
<td>45.5%</td>
<td>44.9%</td>
<td>44.5%</td>
<td>44.9%</td>
<td>58.1%</td>
<td>59.1%</td>
<td>58.5%</td>
<td>55.8%</td>
<td>58.0%</td>
<td>58.6%</td>
</tr>
<tr>
<td>All customers wearing masks/gloves</td>
<td>38.5%</td>
<td>45.5%</td>
<td>44.5%</td>
<td>44.9%</td>
<td>58.1%</td>
<td>59.1%</td>
<td>58.5%</td>
<td>55.8%</td>
<td>58.0%</td>
<td>58.6%</td>
<td>55.7%</td>
</tr>
<tr>
<td>Curbside pick-up</td>
<td>46.5%</td>
<td>44.9%</td>
<td>44.5%</td>
<td>44.9%</td>
<td>44.5%</td>
<td>58.1%</td>
<td>59.1%</td>
<td>58.5%</td>
<td>55.8%</td>
<td>58.0%</td>
<td>58.6%</td>
</tr>
<tr>
<td>Forced social distancing</td>
<td>41.5%</td>
<td>41.1%</td>
<td>41.3%</td>
<td>41.5%</td>
<td>43.1%</td>
<td>42.6%</td>
<td>42.8%</td>
<td>43.3%</td>
<td>40.1%</td>
<td>38.1%</td>
<td>38.1%</td>
</tr>
<tr>
<td>All staff wearing masks/gloves</td>
<td>37.2%</td>
<td>38.1%</td>
<td>38.1%</td>
<td>38.1%</td>
<td>38.1%</td>
<td>38.1%</td>
<td>38.1%</td>
<td>38.1%</td>
<td>38.1%</td>
<td>38.1%</td>
<td>38.1%</td>
</tr>
<tr>
<td>Knowledge of nightly disinfecting of stores</td>
<td>45.4%</td>
<td>44.1%</td>
<td>44.1%</td>
<td>44.1%</td>
<td>44.1%</td>
<td>44.1%</td>
<td>44.1%</td>
<td>44.1%</td>
<td>44.1%</td>
<td>44.1%</td>
<td>44.1%</td>
</tr>
<tr>
<td>Ability to pay without contact</td>
<td>37.2%</td>
<td>38.1%</td>
<td>38.1%</td>
<td>38.1%</td>
<td>38.1%</td>
<td>38.1%</td>
<td>38.1%</td>
<td>38.1%</td>
<td>38.1%</td>
<td>38.1%</td>
<td>38.1%</td>
</tr>
<tr>
<td>Vaccines having become widely available</td>
<td>49.8%</td>
<td>49.8%</td>
<td>49.8%</td>
<td>49.8%</td>
<td>49.8%</td>
<td>49.8%</td>
<td>49.8%</td>
<td>49.8%</td>
<td>49.8%</td>
<td>49.8%</td>
<td>49.8%</td>
</tr>
<tr>
<td>None of the above</td>
<td>40.1%</td>
<td>38.1%</td>
<td>38.1%</td>
<td>38.1%</td>
<td>38.1%</td>
<td>38.1%</td>
<td>38.1%</td>
<td>38.1%</td>
<td>38.1%</td>
<td>38.1%</td>
<td>38.1%</td>
</tr>
</tbody>
</table>
How frequently are you now going to crowded activities (e.g., movie theaters, concerts, sporting events)?

- More than once a week
- Once a week
- Once a month
- Once a year
- Not going to crowded activities at all, until the coronavirus situations is under control
- Not applicable: I do not go to crowded activities anyway
How frequently are you now dining in at restaurants?

- More than once a week
- Once a month
- Once a week
- Once a quarter
- Less than once a year
- Never
- Not applicable: I do not dine in at restaurants anyway

Resonate COVID-19 and Emerging Trends Consumer Flash Study, Wave 13, March 2021
Which of the following must occur, in order for you to once again feel comfortable doing activities involving crowds (e.g., going to a bank, shopping, attending a concert or sporting event, or dining in at a restaurant)? Please select all that apply.

- Once I see/hear about others going
- When a vaccine becomes widely available
- Everyone wearing masks/gloves
- Forced social distancing
- Don’t know or not sure
- When the rate of deaths/infections significantly decrease

Resonate COVID-19 and Emerging Trends Consumer Flash Study, Wave 13, March 2021
Which of the following shopping preferences are now important to you?

Curbside pick-up: 41.0%
Same-day delivery: 38.7%
Browsing and buying in a physical store: 33.0%
None of the above: 24.0%

August 11-18: 16.9%
Sept 15-21: 16.3%
Oct 5-13: 14.2%
Nov 23-Dec 14: 17.1%
Dec 15-Jan 6: 15.1%
Feb 2-16: 17.5%
Feb 22-Mar 10: 13.6%
To what extent does the cost of shipping or delivery influence your decision to shop in a physical store rather than online?

- Not at all influential
- Slightly influential
- Moderately influential
- Very influential
- Extremely influential

August 11-18: 13.0%
Sept 15-21: 16.4%
Oct 5-13: 16.4%
Nov 23-Dec 14: 14.7%
Dec 15-Jan 6: 13.7%
Feb 2-16: 14.3%
Feb 22-Mar 10: 12.6%

+2.2pts cost of shipping is very or extremely influential
POLITICS

To what extent does Facebook have a responsibility to identify and suppress false news and information from its services?

To an extremely small extent
To a very small extent
To a small extent
To a moderate extent
To a large extent
To a very large extent
To an extremely large extent


Resonate COVID-19 and Emerging Trends Consumer Flash Study, Wave 13, March 2021

© Resonate. All rights reserved. Proprietary & Confidential. resonate.com
Thinking about the coronavirus situation, how strongly do you agree or disagree that the federal government can be trusted
Thinking about the coronavirus situation, how strongly do you agree or disagree that the **Federal government is effective in addressing a crisis**?
Thinking about the coronavirus situation, how strongly do you agree or disagree that the state and local government can be trusted?

Resonate COVID-19 and Emerging Trends Consumer Flash Study, Wave 13, March 2021
Thinking about the coronavirus situation, how strongly do you agree or disagree that the: state and local government is effective in addressing a crisis
As a result of the coronavirus situation, to what extent has your opinion of the following individuals become better or worse: Former President Trump

- Much worse
- Worse
- Mildly worse
- Stayed the same
- Mildly better
- Better
- Much better

Resonate COVID-19 and Emerging Trends Consumer Flash Study, Wave 13, March 2021
As a result of the coronavirus situation, to what extent has your opinion of the following individuals become better or worse: President Joe Biden

<table>
<thead>
<tr>
<th>Month</th>
<th>Much worse</th>
<th>Worse</th>
<th>Mildly worse</th>
<th>Stayed the same</th>
<th>Mildly better</th>
<th>Better</th>
<th>Much better</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 22-29</td>
<td>53.1%</td>
<td>44.6%</td>
<td>44.3%</td>
<td>50%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>April 20-26</td>
<td>14.4%</td>
<td>16.2%</td>
<td>17.0%</td>
<td>15.8%</td>
<td>17.4%</td>
<td>19.6%</td>
<td>19.1%</td>
</tr>
<tr>
<td>May 11-18</td>
<td>10.0%</td>
<td>10.0%</td>
<td>10.5%</td>
<td>10.7%</td>
<td>10.1%</td>
<td>10.9%</td>
<td>15.5%</td>
</tr>
<tr>
<td>June 8-14</td>
<td>8.8%</td>
<td>8.2%</td>
<td>7.2%</td>
<td>9.0%</td>
<td>10.9%</td>
<td>11.9%</td>
<td>14.8%</td>
</tr>
<tr>
<td>June 29-July 6</td>
<td>7.0%</td>
<td>7.6%</td>
<td>7.0%</td>
<td>7.6%</td>
<td>9.3%</td>
<td>7.0%</td>
<td>6.6%</td>
</tr>
<tr>
<td>July 22-28</td>
<td>8.2%</td>
<td>8.7%</td>
<td>6.1%</td>
<td>6.8%</td>
<td>7.6%</td>
<td>6.6%</td>
<td>4.6%</td>
</tr>
<tr>
<td>August 11-18</td>
<td>7.1%</td>
<td>6.7%</td>
<td>6.2%</td>
<td>7.0%</td>
<td>6.1%</td>
<td>5.6%</td>
<td>5.2%</td>
</tr>
<tr>
<td>Sept 15-21</td>
<td>6.6%</td>
<td>6.6%</td>
<td>6.6%</td>
<td>6.6%</td>
<td>5.9%</td>
<td>7.0%</td>
<td>7.0%</td>
</tr>
<tr>
<td>Oct 5-13</td>
<td>5.8%</td>
<td>6.1%</td>
<td>7.0%</td>
<td>7.0%</td>
<td>6.6%</td>
<td>6.6%</td>
<td>6.6%</td>
</tr>
<tr>
<td>Nov 23-Dec 14</td>
<td>5.4%</td>
<td>7.0%</td>
<td>6.6%</td>
<td>6.6%</td>
<td>5.9%</td>
<td>7.0%</td>
<td>7.0%</td>
</tr>
<tr>
<td>Dec 15-Jan 6</td>
<td>5.2%</td>
<td>7.0%</td>
<td>6.6%</td>
<td>6.6%</td>
<td>5.9%</td>
<td>7.0%</td>
<td>7.0%</td>
</tr>
<tr>
<td>Feb 2-16</td>
<td>5.8%</td>
<td>6.1%</td>
<td>7.0%</td>
<td>7.0%</td>
<td>6.6%</td>
<td>6.6%</td>
<td>6.6%</td>
</tr>
<tr>
<td>Feb 22-Mar 10</td>
<td>5.4%</td>
<td>6.1%</td>
<td>7.0%</td>
<td>6.6%</td>
<td>6.6%</td>
<td>5.9%</td>
<td>7.0%</td>
</tr>
</tbody>
</table>
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: expanding existing social "safety net" program (e.g., food vouchers, rent subsidies)
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: 

- Enhancing unemployment coverage

![Graph showing changes in opinion from March 22-29 to Feb 22-Mar 10, with percentages indicating how much more opposed, more supportive, stayed the same, etc., for each time period.]
INSIGHTS FOR TODAY & TOMORROW

Driving revenue and growth requires engaging new and existing customers as they navigate massive changes in their ecosystem. Leverage fresh, AI-driven data and continuously updated insights to drive better decisions based on shifting consumer sentiment. Experience the power of the platform.

THE ONLY INTELLIGENCE SOLUTION YOU’LL NEED

Our platform 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. Our A.I.-powered platform dynamically updates more than 13,000 attributes scaled to 200 million individual consumer profiles to reveal the who, what, when, where and why that drives their decisions. Extend this comprehensive understanding to your own customers and leverage across your marketing ecosystem with the Resonate Ignite Platform.

ABOUT RESONATE

Resonate is a pioneer in A.I.-driven consumer data & analytics. Marketing leaders use the Resonate Ignite Platform™ to easily enrich their first party data with the deep, proprietary Resonate Elements data and then deploy new insights into action through seamless integration into their marketing ecosystem. Resonate research delivers more than 13,000 data points, 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.

Want to dig deeper? Contact your Customer Success Manager or, if you’re not yet a Resonate customer, request a demo today.