

Coronavirus (COVID-19)

& Consumer Outlook

Research Overview

During these unprecedented times, consumers and companies alike are trying to make sense of what the Coronavirus (COVID-19) means for them both now and in the foreseeable future. That's why WomenCertified Inc., a leading research firm and home to the Women's Choice Award has tapped into the mindset of over 880 female consumers across America to understand how this pandemic is affecting their consumer and healthcare behaviors today, as well as their outlook for the future.

In addition, consumers were asked about the changing expectations they will have from the companies and brands across America, and how organizations can help them feel more at ease during these times.

Below are research findings and insights, based on 5 major areas of focus:

- Consumer Outlook
- Consumer Behavior
- Healthcare
- Media
- Government

Survey Landscape:

WomenCertified Inc.'s survey panel, '[The HERd](#)' was established over a decade ago, and consists of over 30,000 active survey participants who have joined in an effort to let their voices be 'herd', sharing the brands they highly recommend, as well as participating in

research panels to provide timely insights on today's consumer marketplace. WomenCertified Inc. makes a \$1 charitable donation for every participant who completes a survey.

The survey consisted of over 880 female consumers across America, with almost 90% of those women 35 years of age and older. The survey was conducted March 18-March 27, 2020. During this time, as a result of this global pandemic, international travel had come to a halt, many states across America had begun shutting down schools, public spaces, prohibiting visitors at hospitals, and calling for 'social distancing' measures among those citizens who needed to leave their homes for essential purposes only. Companies began asking employees to work from home, while other companies such as store retailers and restaurants began limiting services only to digital and 'take-out' options. Grocery stores and big box retailers had massive shortages of household items, such as hand sanitizer and toilet paper, as well as some variety of food options. In the healthcare landscape, medical workers were facing extreme shortages of PPE (Personal Protective Equipment) as well as hospital beds for the ill. New York, California, and Washington were among the states with the most extensive number of outbreaks and deaths, with New York City becoming the new global epicenter of the COVID-19 outbreak.

Insight on COVID-19 and Consumer Outlook

Key Findings:

While the majority of consumers are remaining optimistic, most also believe that this is the beginning of the next major recession and that they will suffer significant financial losses. In addition to concerns about personal well being and financial hardship, consumers are being impacted emotionally, and a large percentage say it is also impacting their children. Data also shows that in the long-term, almost half of consumers will have a different outlook on products that are 'Made in China.' Among a long list of consumer concerns for our country (listed below), many consumers are also concerned with ongoing panic nationwide; the implementation of martial law; hoarding of essential household products, food, and medication; an increase in crime and homelessness; and the strain on relationships due to prohibitive travel to see family.

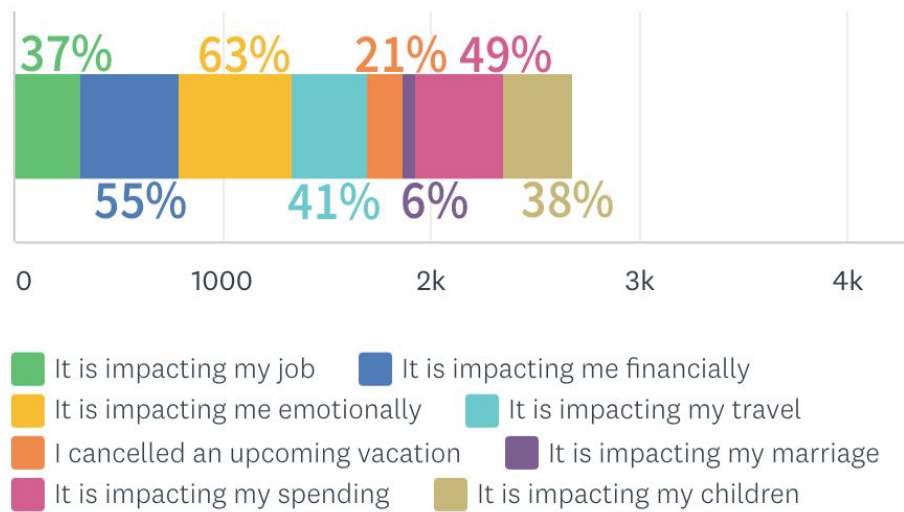
The Data in Numbers:

- 47% of consumers believe that our country is unnecessarily panicking during this time.
- 76% of consumers anticipate financial loss as a result of this pandemic.
- 78% of consumers believe that this marks the beginning of the next major recession for our country.
- When asking how the current state of the country is affecting them based on the Coronavirus outbreak, here is the breakdown from consumers (**Figure 1**):



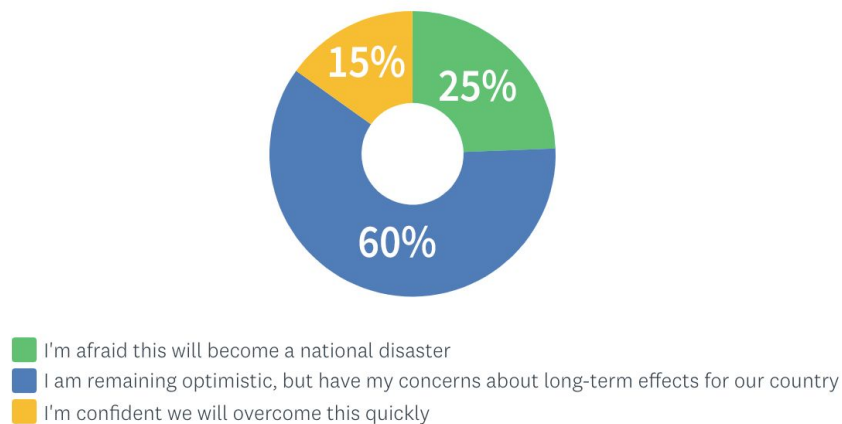
- 63% say “It’s impacting me emotionally”
- 55% say “It’s impacting me financially”
- 49% say “It is impacting my spending”
- 41% say “It’s impacting my travel”
- 38% say “It is impacting my children”
- 37% say “It’s impacting my job”
- 21% say “I cancelled an upcoming vacation”
- 6% say “It is impacting my marriage” (Figure 1)

Figure 1: How the Coronavirus Outbreak is Affecting Consumers



- The majority of consumers are remaining relatively optimistic. When asking consumers about their current outlook for America, 60% say “I am remaining optimistic, but have my concerns about long-term effects for our country”, while 25% say “I’m afraid this will become a national disaster” and 15% say “I am confident we will overcome this quickly”. (Figure 2)

Figure 2: Consumer Outlook for America



- As a result of the Coronavirus pandemic stemming from China, 48% of consumers say that they will have a new outlook now when they see 'Made in China' products, leaving 52% of consumers saying that they do not think this will have a long-term effect for them on how they view 'Made in China' products. (Figure 3)
- When asking consumers how long they believe it will take for the country to get back to normal the majority of consumers think it will take somewhere between 6-12 months. More specifically the data shows that only 8% say 'A few weeks from now'; 26% say 'A few months from now'; 39% say 'Somewhere between 6-12 months'; and 27% say 'More than a year'. (Figure 4)

Figure 3: Consumer Outlook on 'Made in China' Products

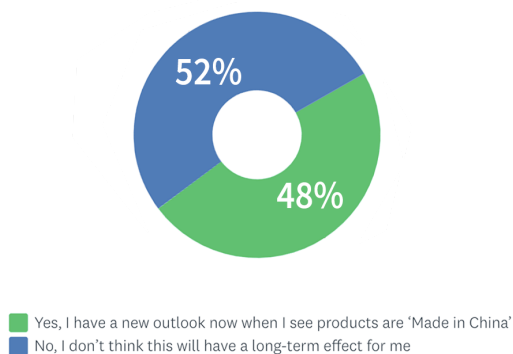
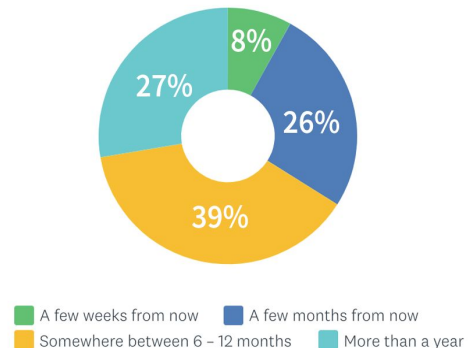


Figure 4: Consumer Outlook on America Getting 'Back to Normal'



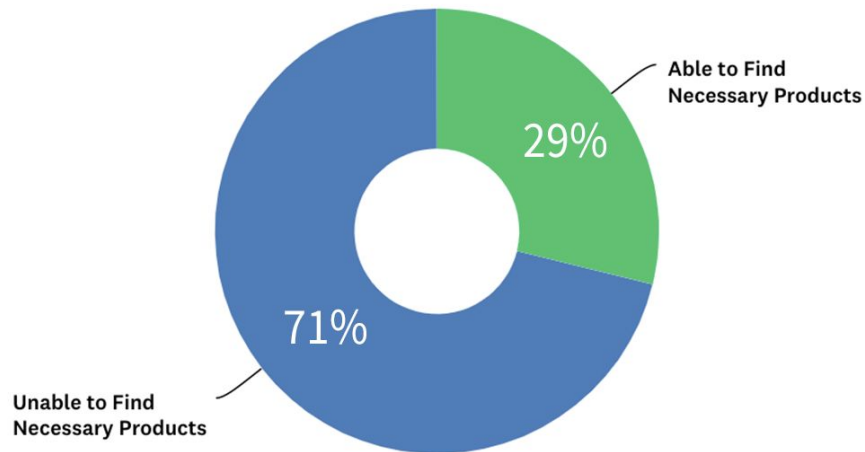
- Consumers share their biggest long-term fears resulting from this pandemic, which include predominantly:
 - Health risks to themselves and their family members
 - Health challenges for those with compromised immune system like those battling cancer
 - Financial hardship (i.e. loss of wages; unemployment; small businesses shutting down; losing their homes; losing college savings for children)
 - Recession on a national and global scale
 - Increase in homelessness
 - Schools being closed for the remainder of the year
 - Stock market losses
 - Effect on retirement
 - Increase in crime as a result of financial hardship (i.e. looting)
 - Impact on the healthcare system and its workers
 - Implementation of martial law
 - The recovery of our economy
 - How the U.S. will make provisions to prevent another pandemic
 - Not being able to visit family (i.e. prohibiting travels; visitation to nursing homes)
 - Strain on relationships due to change in lifestyle habits
 - Shortage of food, household supplies, and medication due to hoarding
 - Socialism
 - Hysteria brought on by the media
 - Effect on entertainment and travel
 - Loss of faith in the government and our leaders

Insight on COVID-19 and Consumer Behavior

Key Findings and Recommendations:

- In consumers' latest shopping trips since the Coronavirus outbreak, 71% of consumers stated that they were unable to find everything that they needed. (Figure 5)

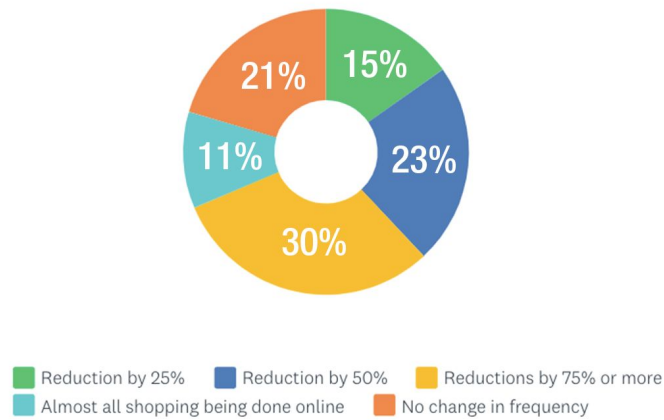
Figure 5: Consumer Ability to Find Necessary Products in Stores



A large majority of consumers have not been able to find the products that they were looking for in recent shopping trips. **As a result, lesser known brands** have significant opportunities for growth with the right marketing.

- Aside from supermarkets to purchase food or necessary household supplies, 80% percent of consumers said that they would not be leaving their homes to go shopping at retail stores or malls.
- When asking consumers if they plan to reduce their number of shopping trips to the supermarket and big box retailers, for the foreseeable future, 15% of consumers say that they will reduce their trips by 25%; 23% say they will reduce their trips by 50%; 30% say they will reduce their trips by 75% or more, and 11% say that they're doing almost all of their shopping online. The remaining 21% of consumers do not feel that their number of shopping trips to the supermarket or big box retailers will decrease in the foreseeable future. (Figure 6)

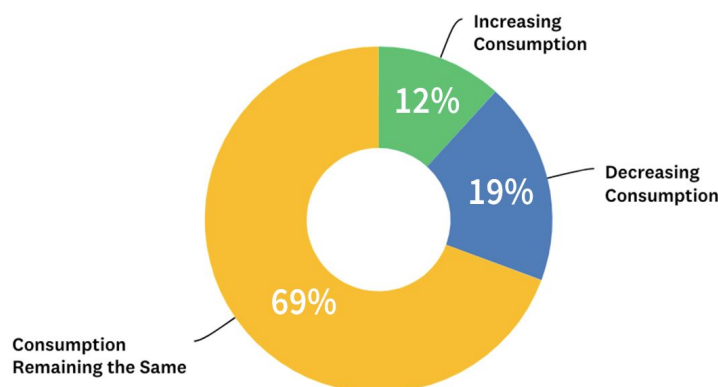
Figure 6: Consumer Reduction in Future Shopping Trips to Supermarkets and Big Box Retailers



The majority of consumers are not planning to leave their homes to go shopping at retail stores or malls in the near future, but more importantly is the fact that over half of consumers say that they will be decreasing their 'outdoor' shopping by over 50% in the foreseeable future. **As a result, it is more important than ever for brands** to ensure that their digital footprint is strong, easy for consumers to navigate, and implement any tools that will help customers choose their brand over the competition.

- 69% percent of consumers say that their consumption of household goods and food is remaining about the same, with 19% saying it's decreasing and the remaining 12% saying it's increasing. (Figure 7)

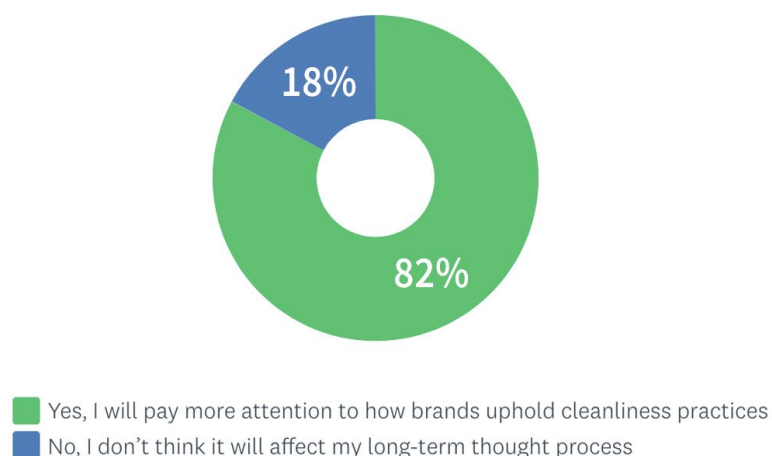
Figure 7: Current Consumer Consumption of Household Foods and Goods



On an upside, the majority of consumers say that their consumption of household products is remaining about the same. **As a result, it's important for brands** to communicate effectively to their consumers, reiterating how their products will help serve their needs and sensitively address why their products or services are superior to the competition.

- As a result of the pandemic, 82% of consumers say that they will pay more attention to how brands (specifically service, retail and restaurant brands), uphold cleanliness policies. (Figure 8)

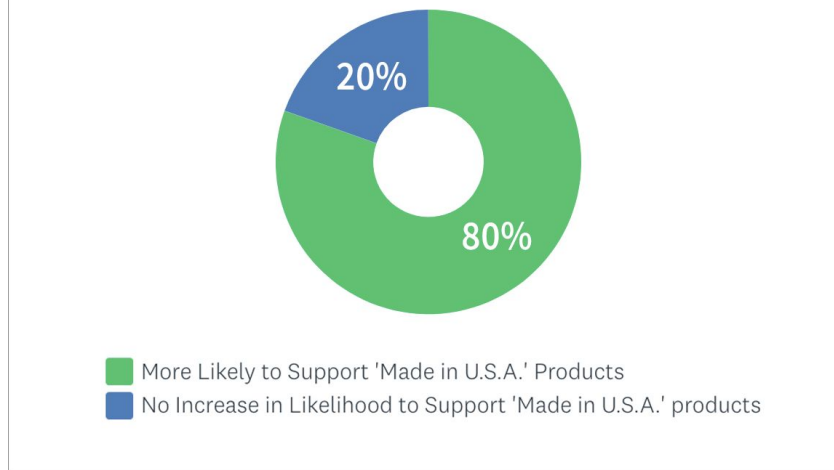
Figure 8: Consumers Paying More Attention to How Brands Uphold Cleanliness Policies



As a result of the pandemic, the vast majority of consumers will be paying closer attention to how brands are upholding cleanliness practices, specifically in service industries such as travel, restaurants and retailers. **As a result, brands should** ensure that their cleanliness practices are up to the highest standards. And, in an effort to stand apart from the pack, it would be wise for brands to *show* their consumers how they're upholding these practices, as opposed to simply telling consumers what they're doing.

- Knowing the impact the country has recently had due to complications with receiving necessary goods from China, a whopping 80% say it will make them more likely to support purchasing 'Made in the USA' products." (Figure 9)

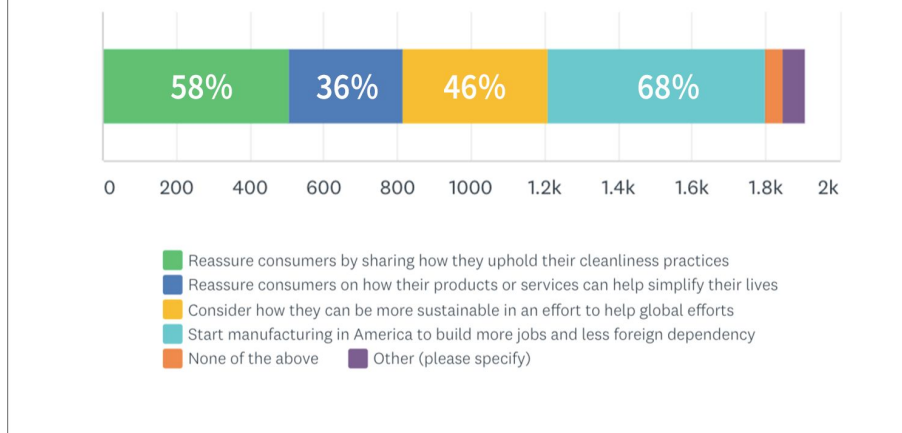
Figure 9: Increase in Consumers Supporting 'Made in U.S.A.' Products



The vast majority of consumers say that this pandemic will make them more likely to support 'Made in the USA' products. **As a result, brands that manufacture their products in the U.S.A should** tout this throughout marketing initiatives, and may even want to elaborate on how this is helping to support the American economy during this time.

- Consumers believe that companies can take the following **actionable steps** to help consumers during this time: Start manufacturing products in the U.S.; Help reassure consumers by sharing what they are doing to uphold cleanliness practices; Think about how they can be more sustainable and; Reassure consumers on how their products or services can be of help to them during this difficult time. (Figure 10)

Figure 10: Actionable Steps Consumers Would Like to See from Companies



- When asking consumers which actionable steps companies can take to help consumers during this time: **(Figure 10)**
 - 68% say “Start manufacturing in America to help build more jobs and less dependency on foreign countries”
 - 58% say “Help reassure consumers by sharing what they are doing to uphold their cleanliness practices”
 - 46% say “Start thinking about how they can be more sustainable in an effort to help global efforts and share that with consumers”
 - 36% say “Reassure consumers on how their products or services can help simplify their lives during this difficult time”
 - Among ‘Other’ responses, some consumers stated that brands continually reassuring their employees would be helpful; showing consumers how they uphold cleanliness practices versus just telling them; keeping products and services affordable, and for those larger corporations, hoping they step up to help during this time of need.

Insight on COVID-19 and Healthcare Perception among Consumers

Key Findings:

Most consumers, while concerned about their health and well-being and that of their family, would not rush into the ER or urgent care center after running a fever, unless they also displayed concerning symptoms. And, while the majority of consumers say they are concerned for the health of all citizens, young and old, there is a large percentage that are concerned primarily about senior citizens.

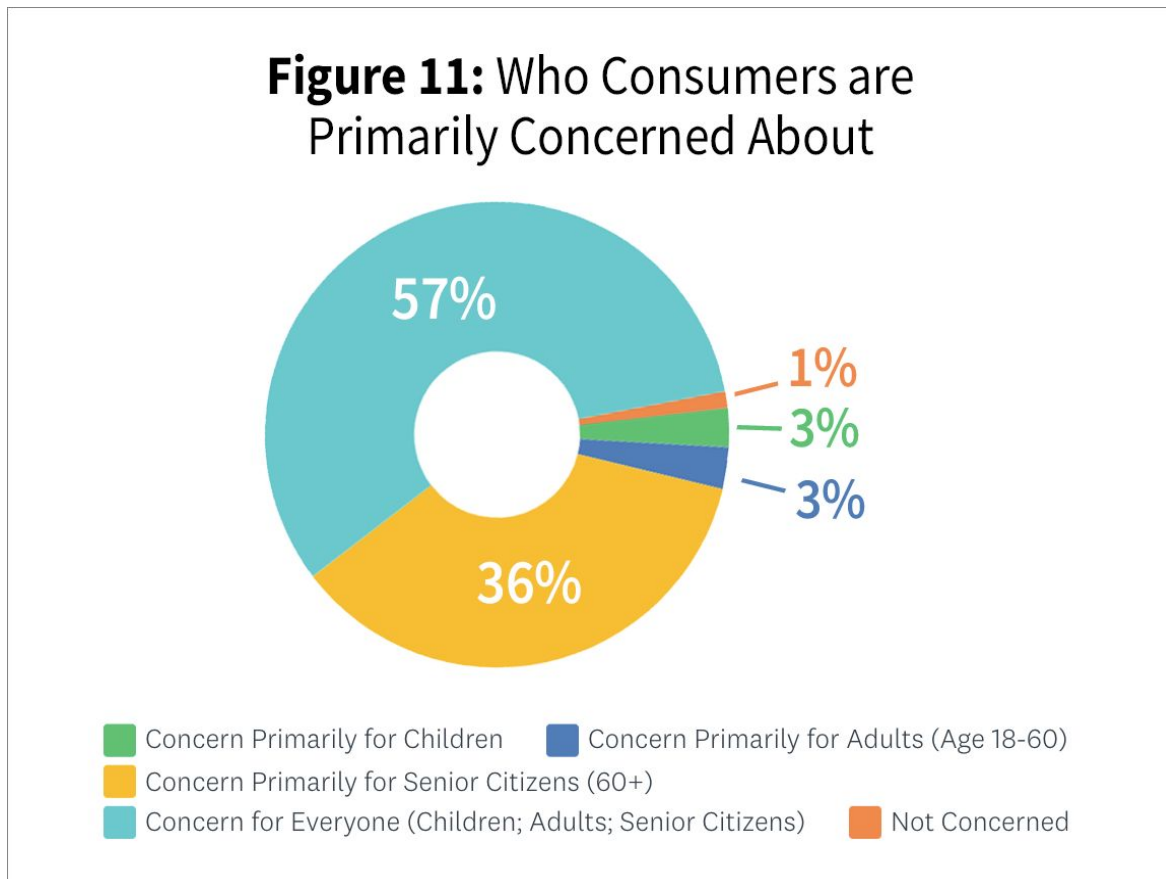
While over a third of consumers have not heard or seen anything from their local hospital since the COVID-19 outbreak, those who have received communications regarding their hospitals seem to have mixed opinions into the hospital’s performance based on communication, COVID-19 testing, and taking necessary precautions during this time. While healthcare institutions and healthcare workers are under a tremendous amount of pressure, it is important for healthcare institutions to create a simple method of communication, reassuring patients in their community. In fact, over 65% of consumers say that more frequent messaging, and illustrating how they uphold the best patient safety protocols would be helpful during this difficult time. For example, the Women’s Choice Award, America’s Best Hospitals designation is a reassuring solution for hospitals.

According to the vast majority of consumers, healthcare facilities would help ease concerns and anxiety upon admission by communicating to their patients their status as a Women’s Choice Award, America’s Best Hospital. And, the majority of consumers find that messaging

that includes the Women's Choice Award is more beneficial than messaging that leaves out this important distinction.

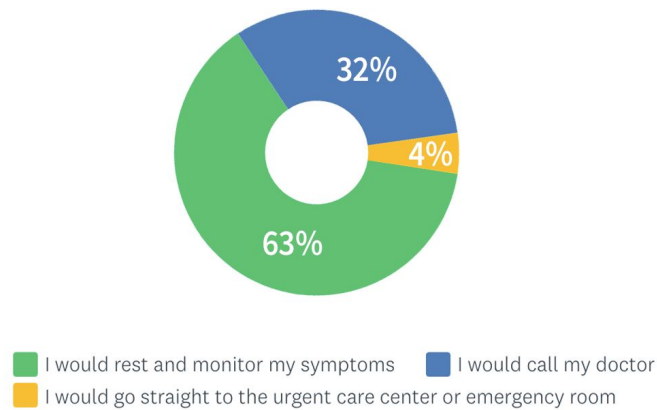
The Data in Numbers:

- When asking consumers whose health and wellness they are most concerned about during the COVID-19 pandemic, 57% say children, adults and senior citizens, while 36% say they are most concerned about senior citizens. **(Figure 11)**



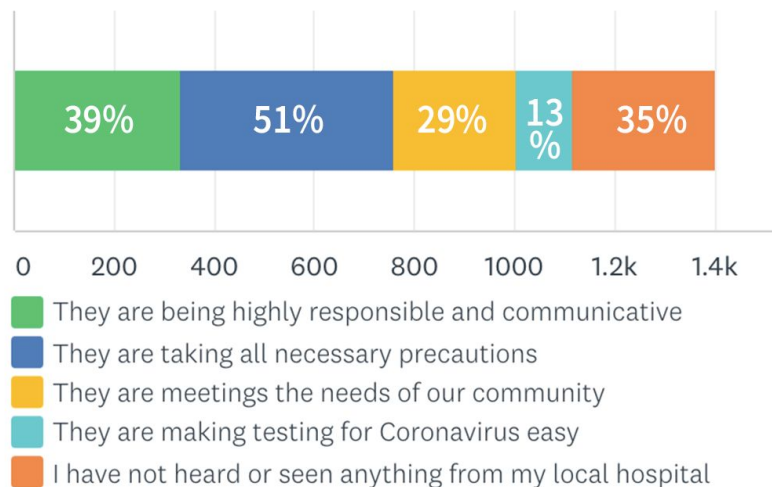
- If consumers were to become sick with a fever during this time and did not display any alarming symptoms such as shortness of breath or a very high fever, 63% say they would simply rest and monitor their symptoms; while 32% say they would call their doctor; 4% say they would go straight to the urgent care center or emergency room. **(Figure 12)**

Figure 12: Anticipated Consumer Behavior as a Result of Getting Sick During the Pandemic

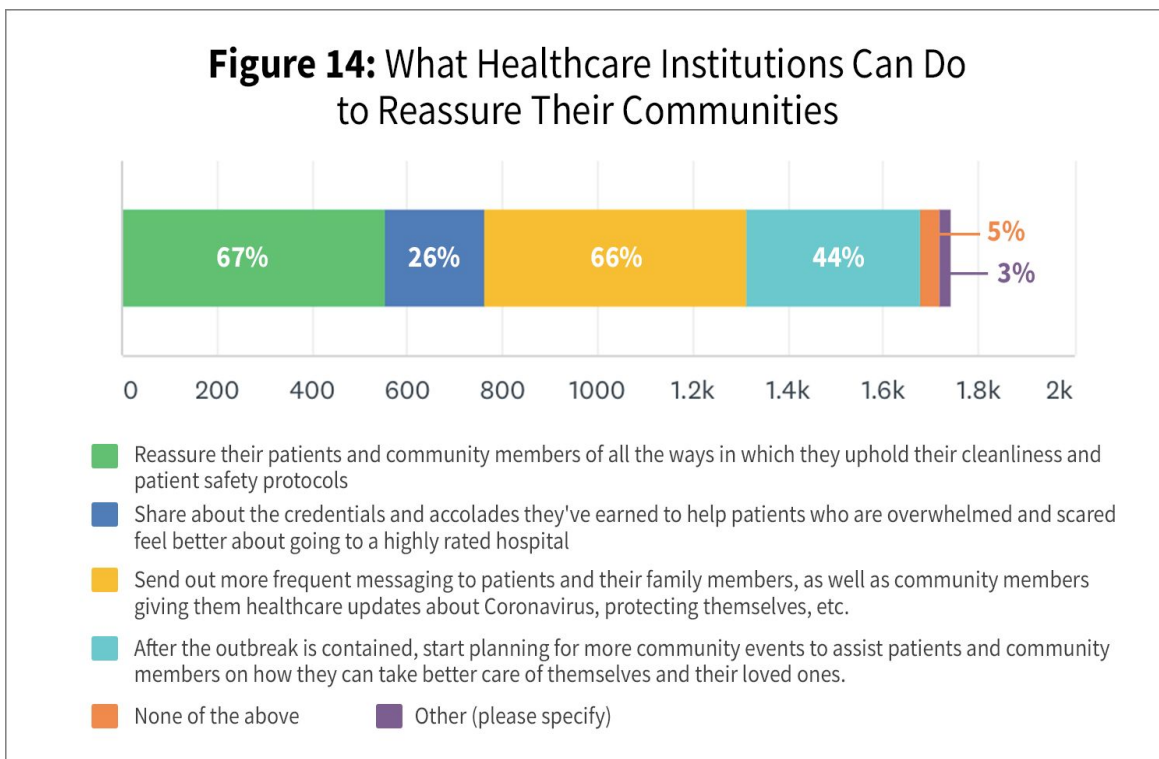


- When asking consumers how the Coronavirus is impacting their opinion of their local healthcare, 35% of consumers say that they have not heard or seen anything from their local hospital. Of the remaining responses, here is their outlook: (**Figure 13**)
 - 51% say “They are taking all necessary precautions”
 - 39% say “They are being highly responsible and communicative”
 - 29% say “They are meeting the needs of our community”
 - 13% say “They are making testing for Coronavirus easy”

Figure 13: Consumer Insight on Healthcare Institutions During the Pandemic



- When asking consumers what healthcare facilities could do right now to be most helpful during this time, consumers say: (Figure 14)
 - 67% say “Reassure their patients and community members of all the ways in which they uphold their cleanliness and patient safety protocols”
 - 66% say “Send out more frequent messaging to patients and community members, giving them healthcare updates about Coronavirus, protecting themselves, etc.”
 - 44% say “After the outbreak is contained, start planning for more community events to assist patients and community members on how they can take better care of themselves and their loved ones.”
 - 26% say “Share about the credentials and accolades they’ve earned to help patients who are overwhelmed and scared feel better about going to a highly rated hospital



Insight on COVID-19 and Media Perception among Consumers

- In general, most consumers (72%) trust the media *to some extent* to give them all the facts, but the vast majority of consumers (60%), say that while they somewhat trust the news, they defer to more credible sources not affiliated with politics for important information. 28% outright do not trust the media, and only 12% said they completely trust the media to give them all the facts.

- When asking consumers to select up to 3 choices on where they generally get most of their news, “Morning or evening TV news shows” ranked highest, with 72% ; “Online” ranked second highest with 64%; and “Social Media” ranked 3rd highest with 31%. Less than 25% of people selected “Colleagues/Family/Friends” (24%), “Newspaper” (21%), or “Radio” (19%), and less than 2% selected “Magazines”.
- When asking consumers to select the media brands that they trust, here are how the major news sources rank among female consumers:
 - CBS (39%)
 - NBC (38%)
 - ABC (35%)
 - CNN (30%)
 - FOX (26%)
 - MSNBC (18%)
 - NEW YORK TIMES (17%)
 - BBC (16%)
 - CNBC (14%)
 - WALL STREET JOURNAL (11%)
 - U.S. NEWS (11%)
 - NEWSWEEK (10%)
 - TIME MAGAZINE (10%)
 - BLOOMBERG (7%)

Remaining news sources such as Apple News and Al Jazeera received less than 5%. About 4% of consumers said they trust all of the news sources mentioned, and 19% of consumers said that they didn’t trust any of them.

Insight on COVID-19 and Consumer Perception on the U.S. Government

- When asking consumers if they feel confident in how our government is handling the pandemic, most believe so, with 30% saying ‘Yes’, 39% saying ‘Somewhat’, and 31% saying ‘No’.
- The majority of consumers (62%), believe the government administration could have done a better job to prevent the COVID-19 outbreak.

How the Women's Choice Award Drives Much Needed Trust

Over 85% of women will trust a brand more when they see the Women's Choice Award seal.

Consumers are more risk-averse than ever.

And those brands who have earned the Women's Choice Award, as determined by women across America, would highly benefit from showcasing their prestigious designation in marketing efforts. This seal is a visual beacon that minimizes the 'risk' consumers feel when trying something new. As research has consistently shown, the Women's Choice Award not only puts consumers at ease when identifying the best products and services, but also gives your brand a powerful halo-effect, as a brand loved by consumers across America.



And, as consumers are shopping online more than ever, Women's Choice Award partners have a unique opportunity to promote their award designation across all digital platforms, including websites, social media, and product pages throughout the sales process.

Furthermore, it's important to be attuned to the current condition of consumers across America, and leveraging the Women's Choice Award seal in marketing efforts is a sensitive way in which brands can tout their own highly recommended products and services as determined by consumer peers, while also making consumers feel at ease as they navigate their journey for the best products and services now and in the future.

Let's talk about how we can help you succeed in the new norm.

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Please stay safe and hopeful!

