IZEA INSIGHTS SPECIAL REPORT

The Second Wave

Consumer Intent as COVID-19 Cases Spike in the United States

JULY 28, 2020

BACKGROUND

We surveyed a total of **1,251 U.S. Internet Users** to help understand consumer behaviors as the U.S. sees a **second wave** of Coronavirus cases. We took that data and applied it to the Influencer Marketing industry.

GOALS

- Provide **insights** for our partners who are responsible for marketing products and services during the Coronavirus lockdown.
- Inform, educate, and assist decision makers that must adapt to a high stress environment and **continue to operate** their businesses.
- Help all parties understand **sensitive topics** and how they may be able to interact with consumers during an unprecedented national crisis.
- **Protect** the brands, influencers, and end consumers that make our industry work.

Sample Population

This study references prior IZEA research.

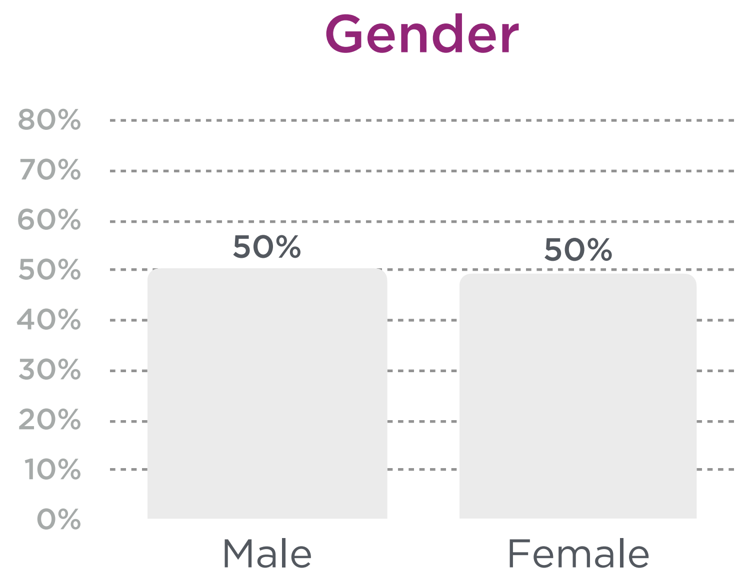
To view all research visit izea.com/covid19

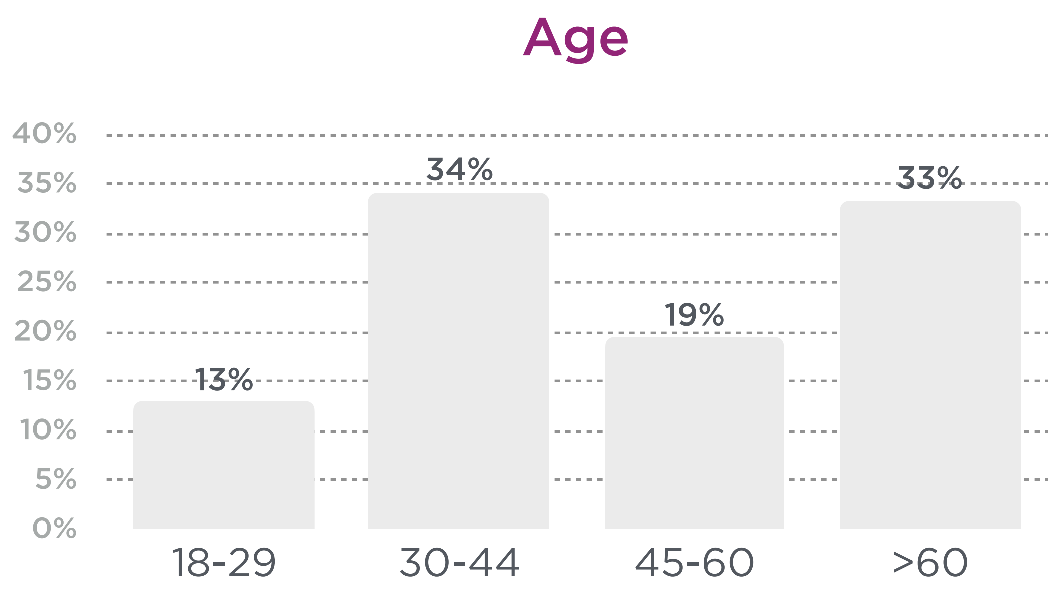
U.S. CONSUMERS

U.S.	7/17/20	7/28/20
Geography	Data Gathered	Publish Date

1,251 Qualified Consumers

All respondents were required to have an Internet connection in order to participate in the survey.

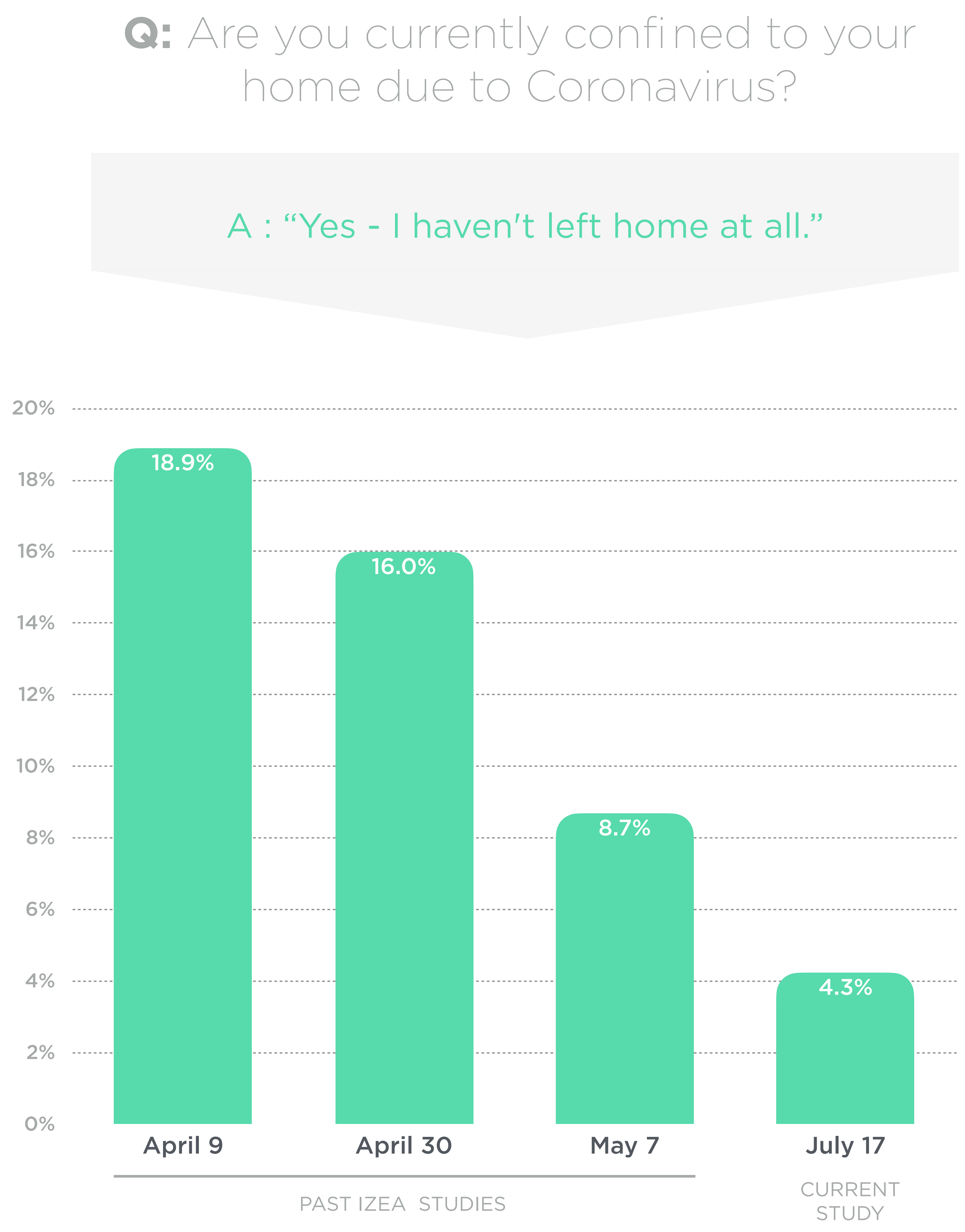




IZEA INSIGHT

Attitudes and behaviors **have shifted over time** as fewer people observe a total lockdown in their homes and have decided to venture out into public spaces.

Since April the percentage of people on total lockdown has fallen from **18.9%** to **4.3%**.



IZEA INSIGHT

Social media influencers are **4.7x more likely** to still be in complete lockdown vs. those that don't use social media at all.

Respondents that say they haven't left their home at all.	RESPONSES BY SOCIAL MEDIA USAGE		
	All Respondents	Influencers	
July 17th	**4.3%**	**20.5%**	4.7x vs. No Social Use
May 7th	8.7%	30.0%	
April 9th	18.9%	38.0%	

Q: Would you **wear a mask** in order to visit your favorite retailer or restaurant if required?

98% OF THOSE AGES 60+ WOULD WEAR A MASK

91% OF THOSE AGES 30-59 WOULD WEAR A MASK

94% OF THOSE AGES 18-29 WOULD WEAR A MASK

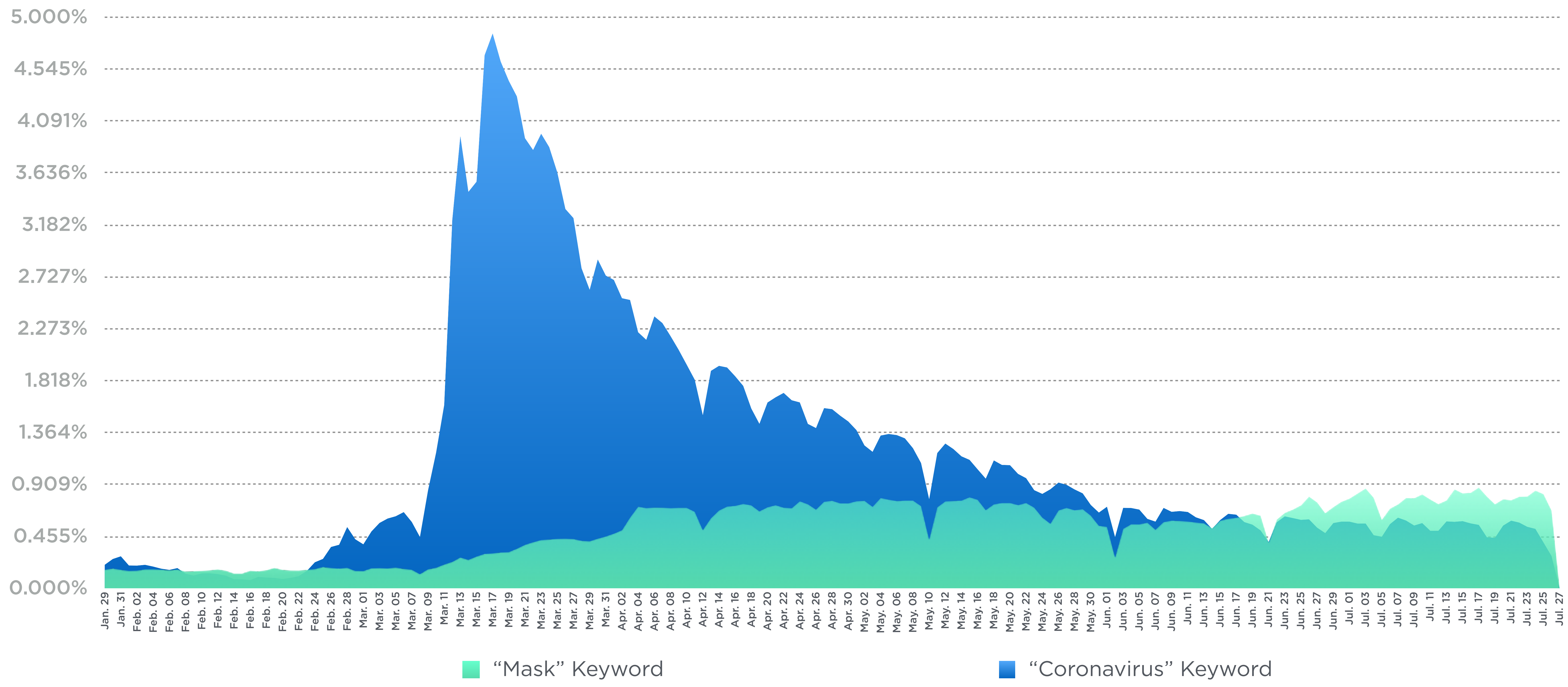
OF ALL RESPONDENTS

Say that **they would** wear a mask.

IZEA INSIGHT

The pro-mask movement is gaining momentum and the general public is supportive of masks contrary to isolated stories portrayed by the media.

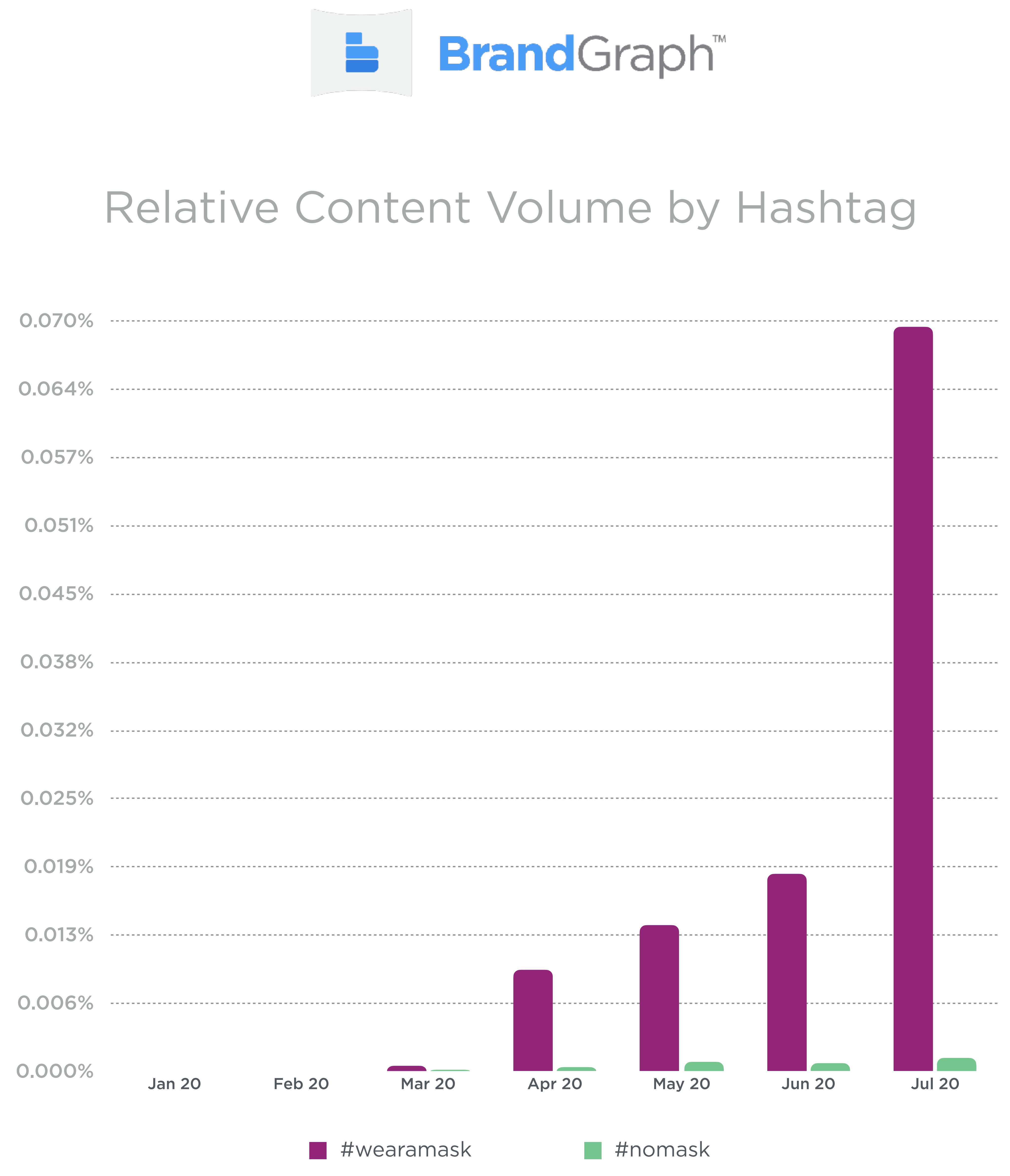
Relative Content Volume by Keyword



BrandGraph™

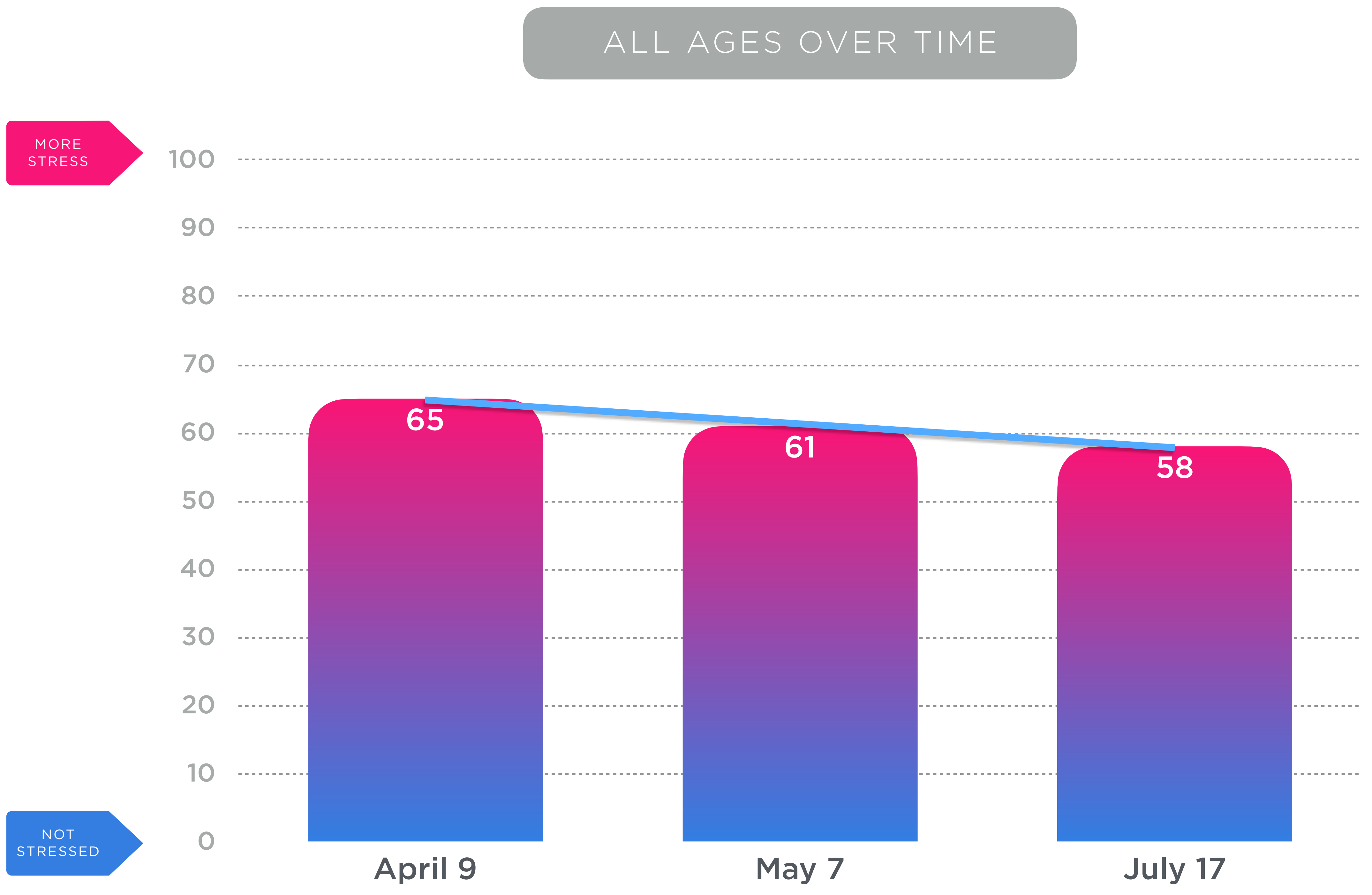
BrandGraph data reveals that mentions of “Mask” overtook mentions of “Coronavirus” in June and continues to rise.

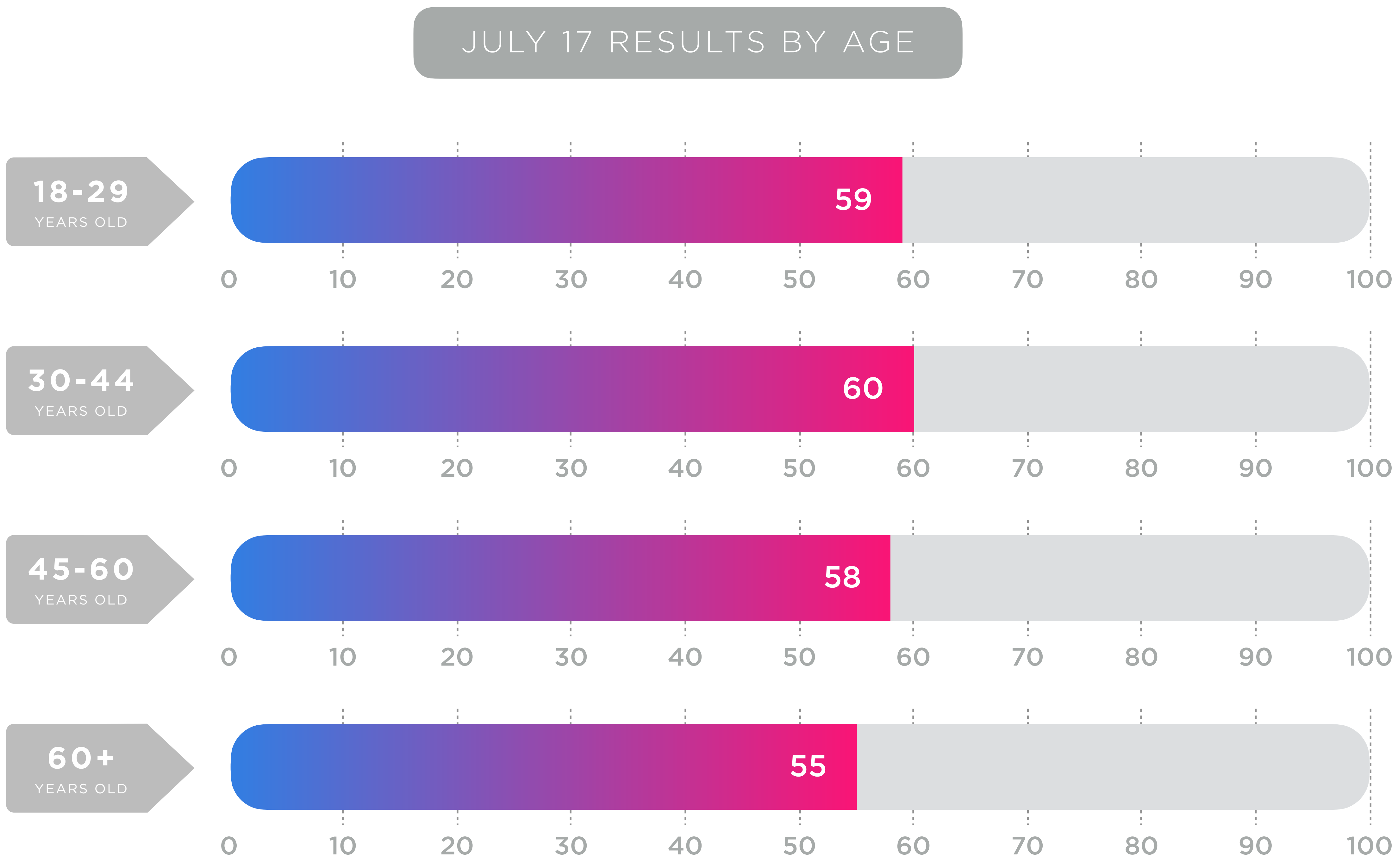
There is **53x more** social media support for the #wearamask movement.



Stress levels among consumers **continue to drop.**

Q : What is your level of stress right now? (0-100)





There is likely a correlation between more people leaving their homes and consumer stress levels dropping.

IZEA INSIGHT

There has been a significant decrease of those that indicated they are **"drinking more alcohol"** for the beer and wine categories since our first study in March.

THE NEW NORMAL?

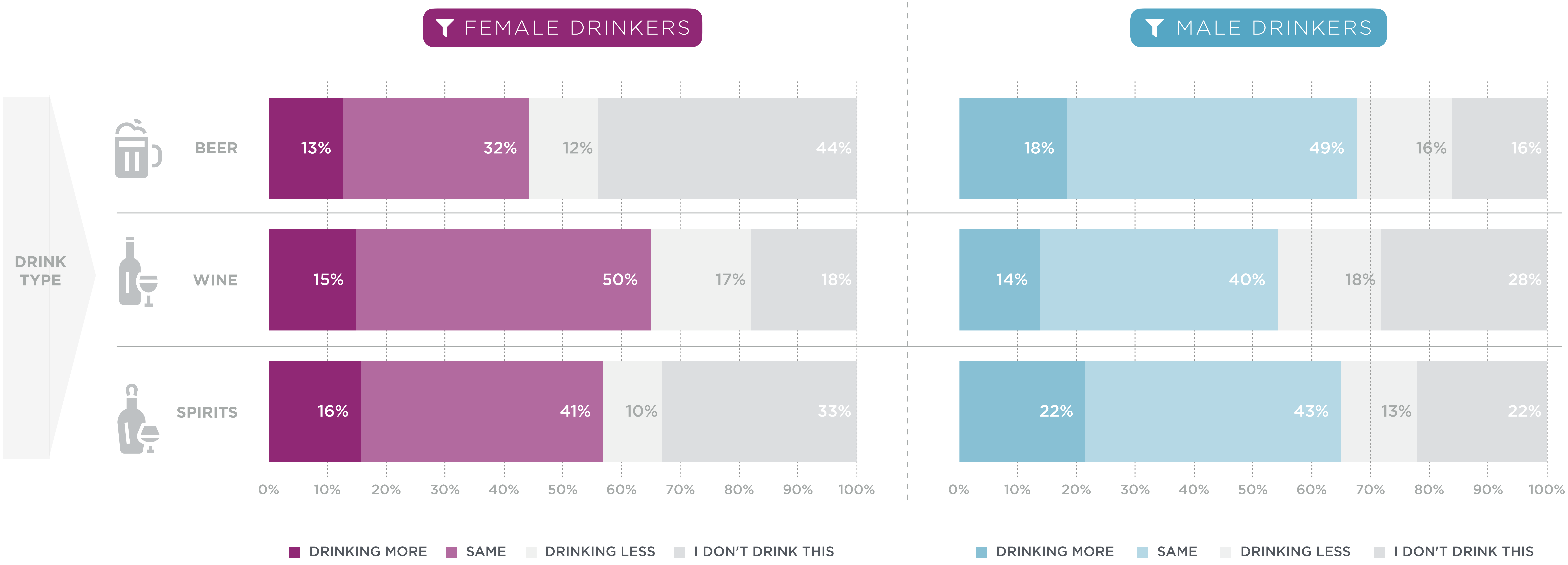
However, consumer responses may be due to the normalization of increased drinking. According to IRI, there's been a **27.5% increase of beer sales** in stores over the same period last year.

16%
SAY THEY ARE DRINKING MORE
BEER
VS.
30%
IN MARCH

14%
SAY THEY ARE DRINKING MORE
WINE
VS.
25%
IN MARCH

19%
SAY THEY ARE DRINKING MORE
SPIRITS
VS.
20%
IN MARCH

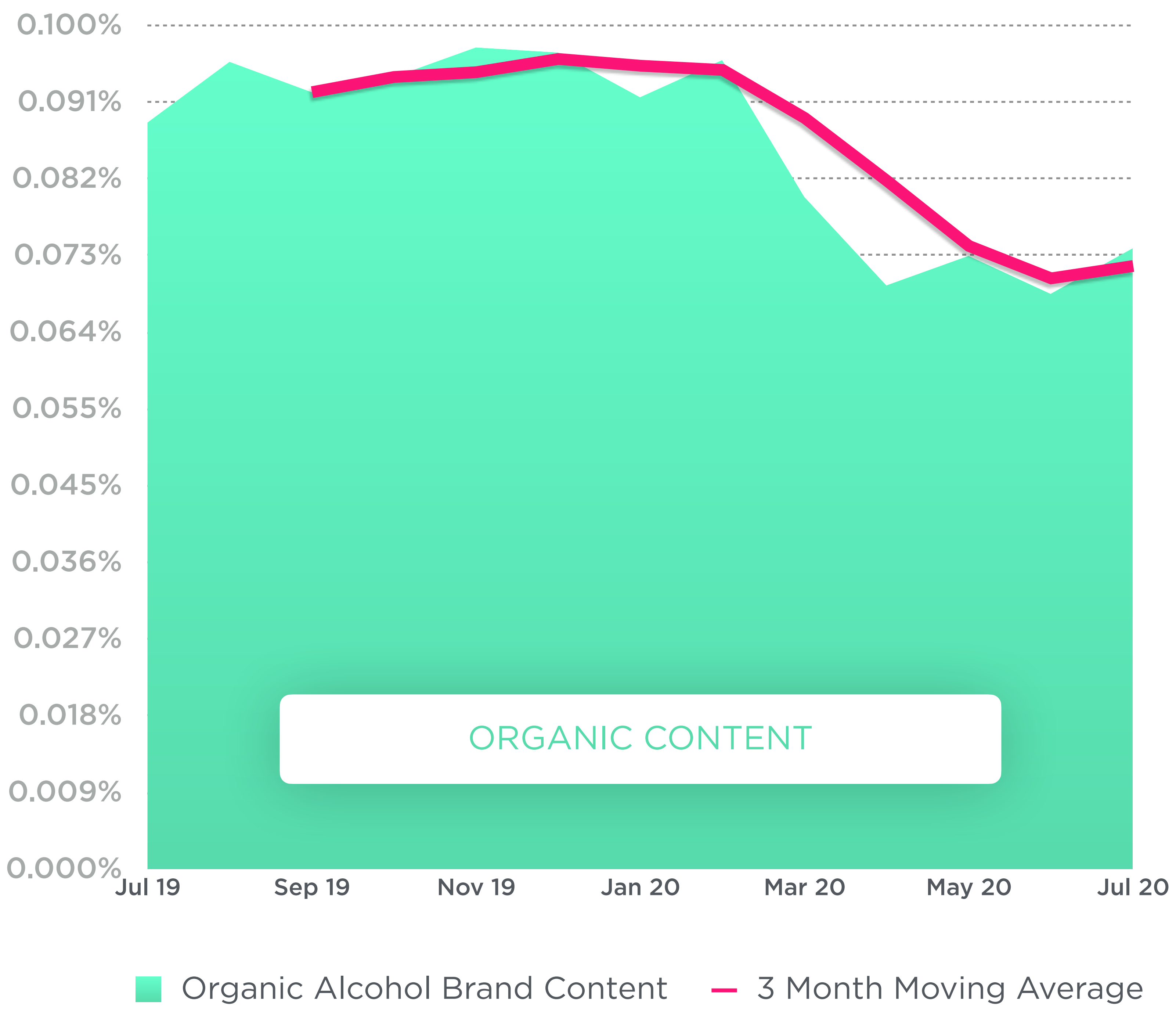
Q: Have you been drinking **more or less alcohol** since first being impacted by Coronavirus?

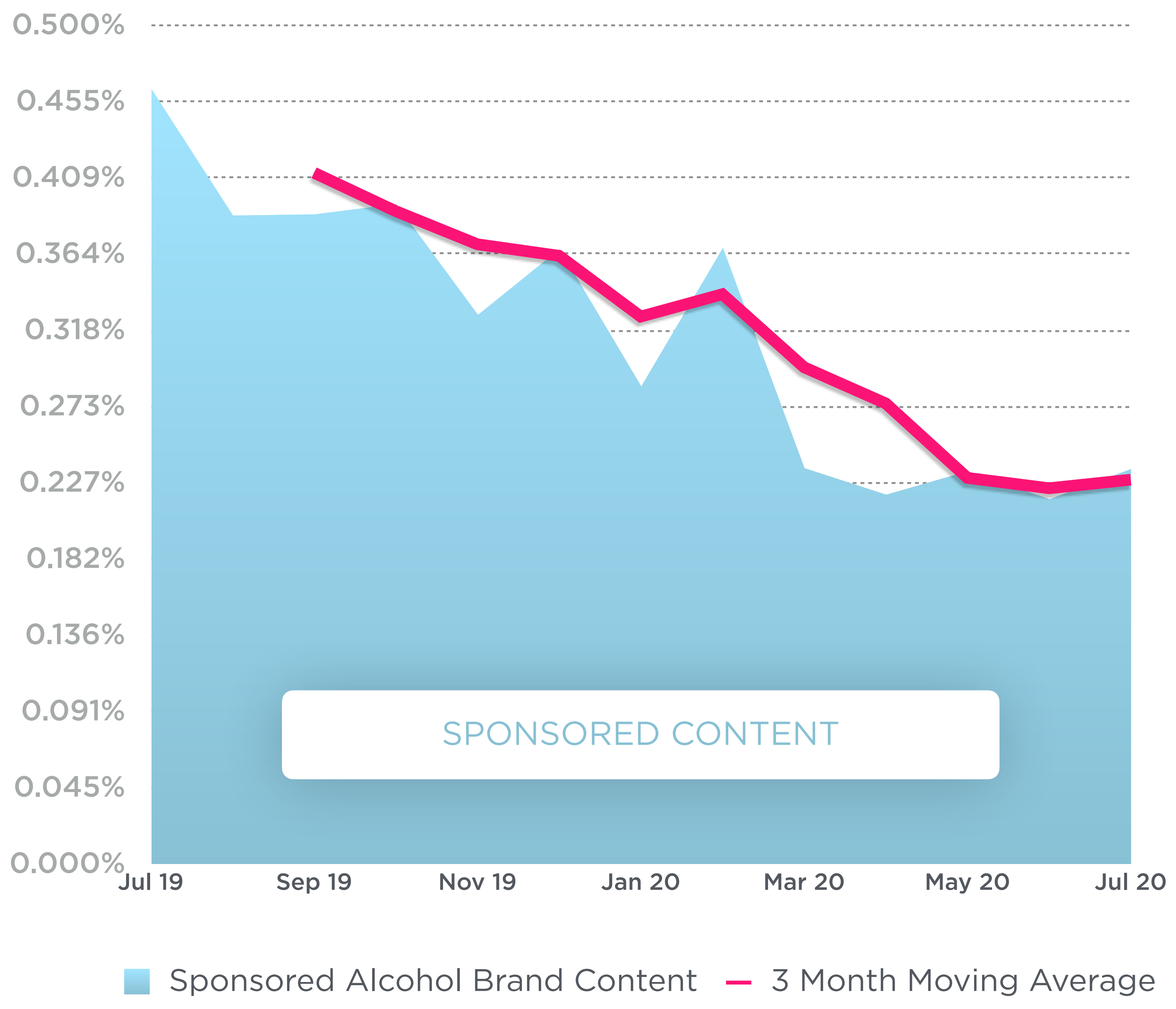


IZEA INSIGHT

Despite increased alcohol sales, consumers are **creating less alcohol-related** social media content.

Alcohol Brand Relative Content Volume

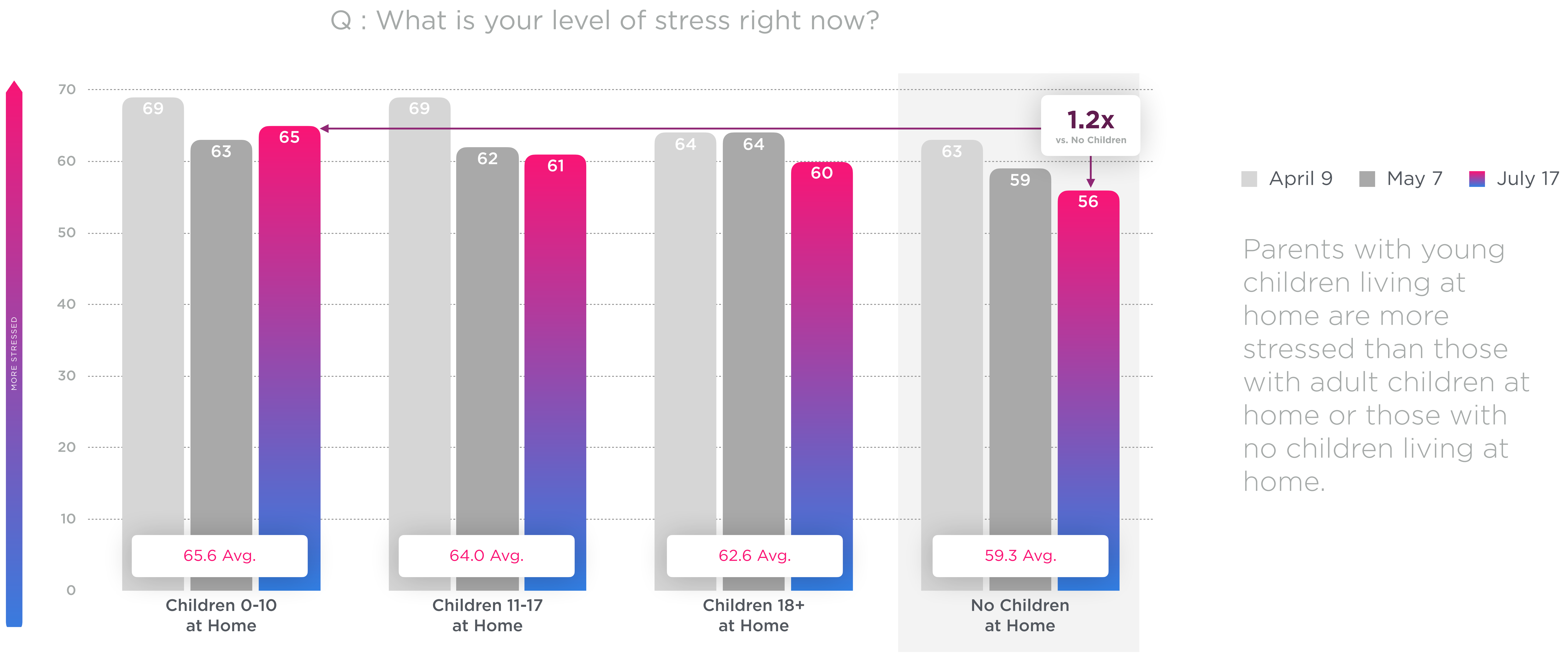




BrandGraph™

BrandGraph data reveals and opportunity for alcohol brands to capture share of voice at a time when organic content creation is **down 21% year over year;** sponsored content creation is **down 50% year over year.**

Parents remain **the most stressed.**



Parents with young children living at home are more stressed than those with adult children at home or those with no children living at home.

IZEA INSIGHT

Parents with **young children** have been struggling with COVID-19 and are now trying to determine what they are going to do as the new school year approaches.

AN OPPORTUNITY FOR BRANDS TO:

- Partner with influential parents who can share authentic stories with other parents
- Provide educational resources and insights
- Offer parent-focused discounts and promotions

Q: Do you plan on sending your child back to a **physical school location** before the end of September?

27% SAY THEIR KIDS WILL

RETURN TO A PHYSICAL LOCATION

Male Parents	31.9%
Female Parents	24.6%

26% SAY THEIR KIDS WILL

LEARN ONLINE

Male Parents	21.9%
Female Parents	27.0%

34% SAY THEIR KIDS WILL

NOT SURE YET

Male Parents	31.9%
Female Parents	36.0%

13% SAY THEIR KIDS WILL

OTHER ALTERNATIVE

Male Parents	14.4%
Female Parents	12.3%

FILTER APPLIED

Parents with minor children at home.

Parents with children at home are **learning new skills.**

24% SAY THEY CAN NOW

COOK

19% SAY THEY CAN NOW

BAKE

13% SAY THEY CAN NOW

PAINT OR DRAW

11% SAY THEY CAN NOW

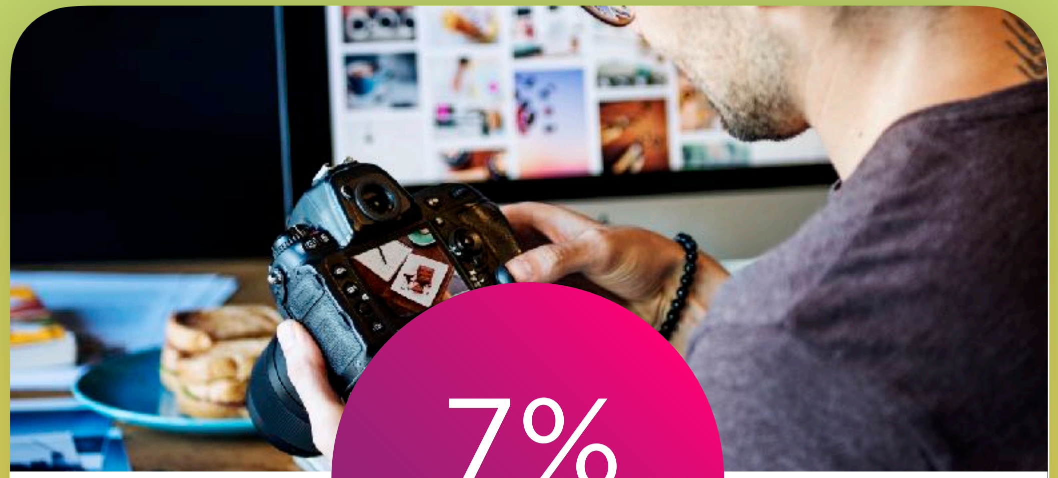
PLAY VIDEO GAMES

9% SAY THEY CAN NOW

SEW

8% SAY THEY CAN NOW

WOODWORK



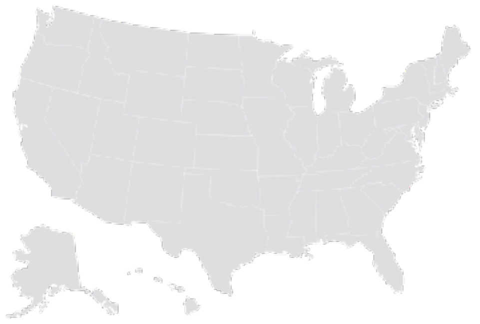
7% SAY THEY CAN NOW

TAKE PHOTOS

5% SAY THEY CAN NOW

SCRAPBOOK

Large opportunity created by new COVID-19 driven skillsets.



133M
U.S. Households
With Minor Children

X  **15%** SAY THEY CAN NOW — PLAY VIDEO GAMES = **31M** NEW **GAMERS**

X  **11%** SAY THEY CAN NOW — PAINT OR DRAW = **23M** NEW **ARTISTS**

X  **7%** SAY THEY CAN NOW — WOODWORK = **15M** NEW **WOODWORKERS**

X  **7%** SAY THEY CAN NOW — TAKE PHOTOS = **15M** NEW **PHOTOGRAPHERS**

10%

6%
MAY 7

+4%
CHANGE

OF PARENTS WITH MINORS LIVING AT HOME

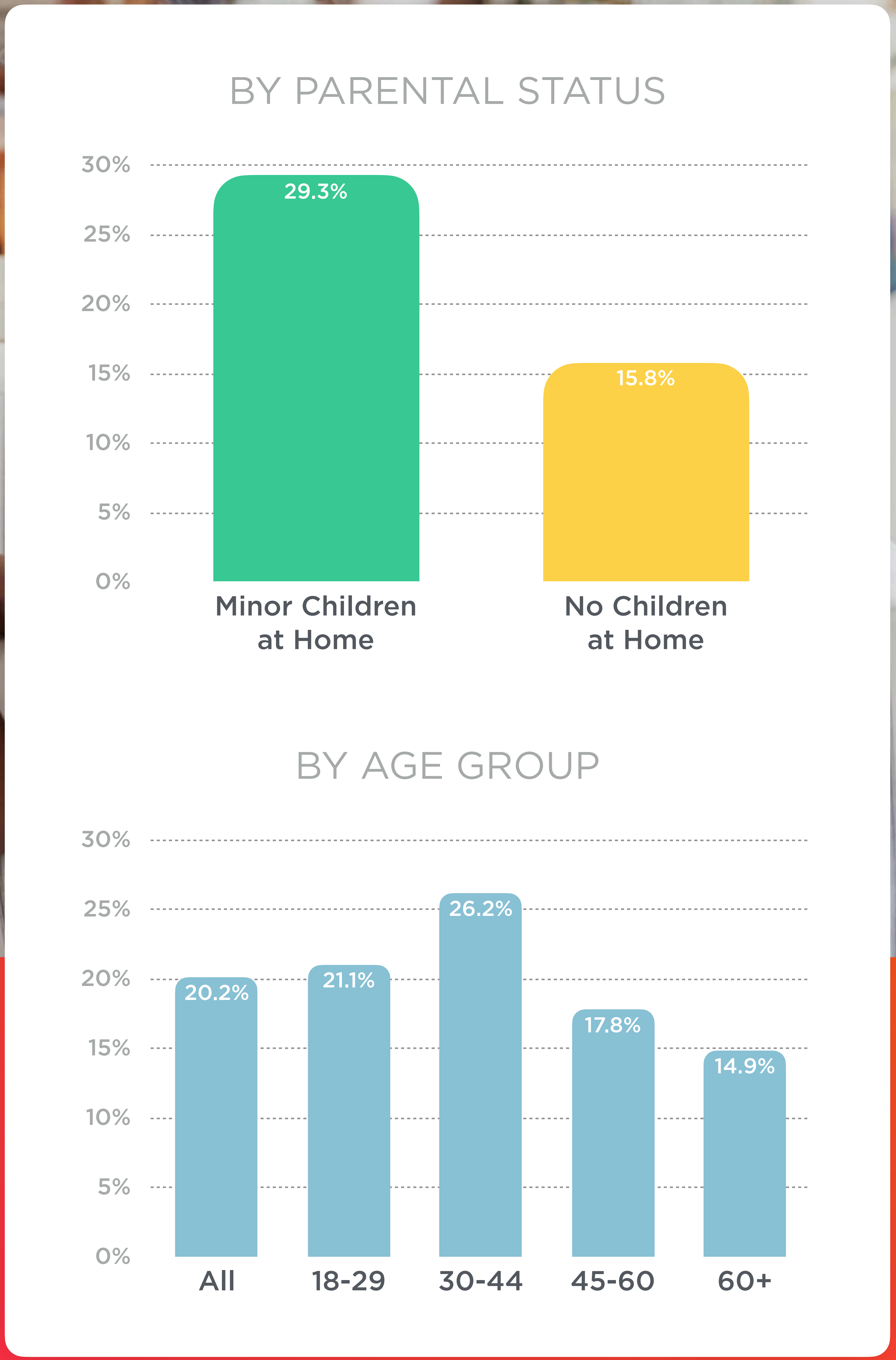
Say that they plan to visit a **childcare facility** in the next 1-4 weeks.

IZEA INSIGHT

Parents **ages 45-60** are most likely to favor online learning and have the **highest budgets** for back-to-school.

	Say their kids will learn online	Have B2S budget greater than $500
Parents Ages 18-29	27.3%	13.6%
Parents Ages 30-44	24.6%	18.9%
Parents Ages 45-60	**30.5%**	**21.0%**
Parents Ages 60+	12.2%	22.2%

1.5x
vs. 18-29

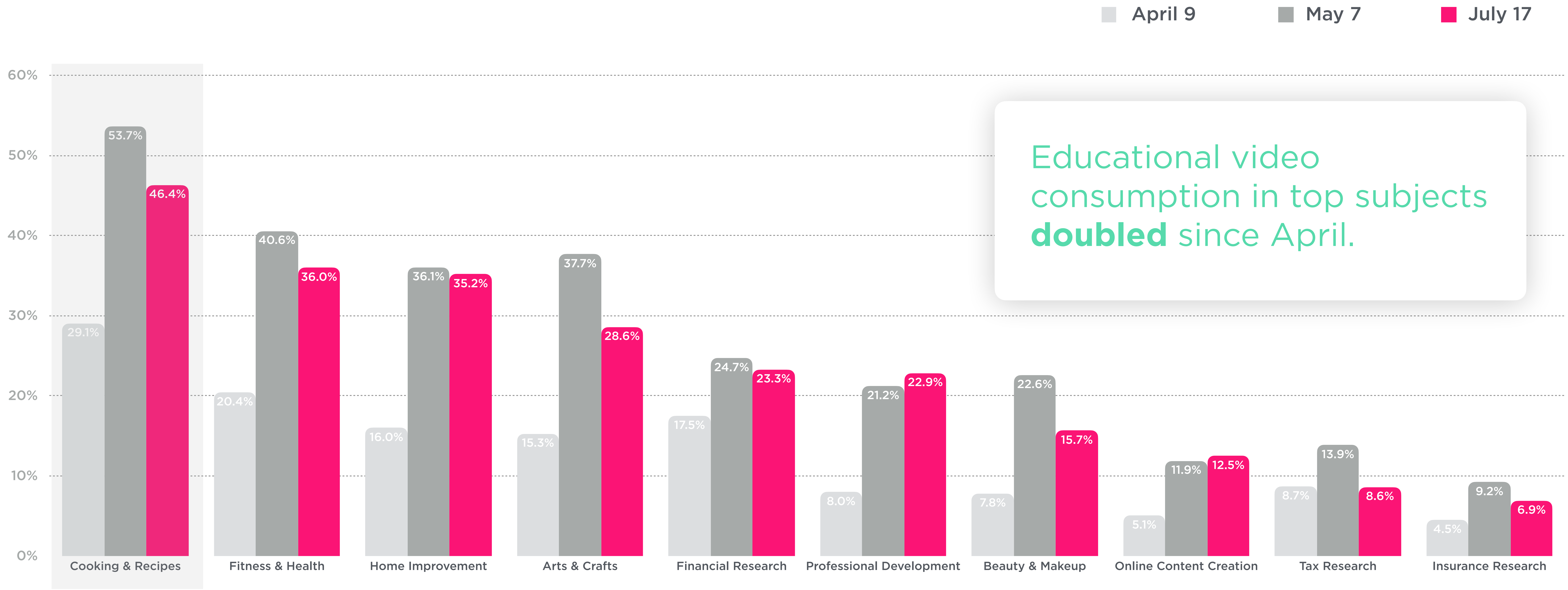


29%

OF PARENTS WITH MINOR CHILDREN AT HOME

Say that they have purchased or will **purchase a laptop** since being impacted by COVID-19

Q: What type of **research and educational videos** have you watched while being impacted by Coronavirus?



Educational video consumption in top subjects **doubled** since April.

31%

OF ALL RESPONDENTS

Say that their **mental health has declined** since being impacted by Coronavirus

Q: Has your mental health improved or declined since being impacted by Coronavirus?

	RESPONSES BY TIME		
	April 4	May 7	Jul 17
Has Improved	8.5%	7.3%	7.3%
Has Declined	**31.6%**	**35.8%**	**31.3%**

COVID-19 impacts the health of many.

28%

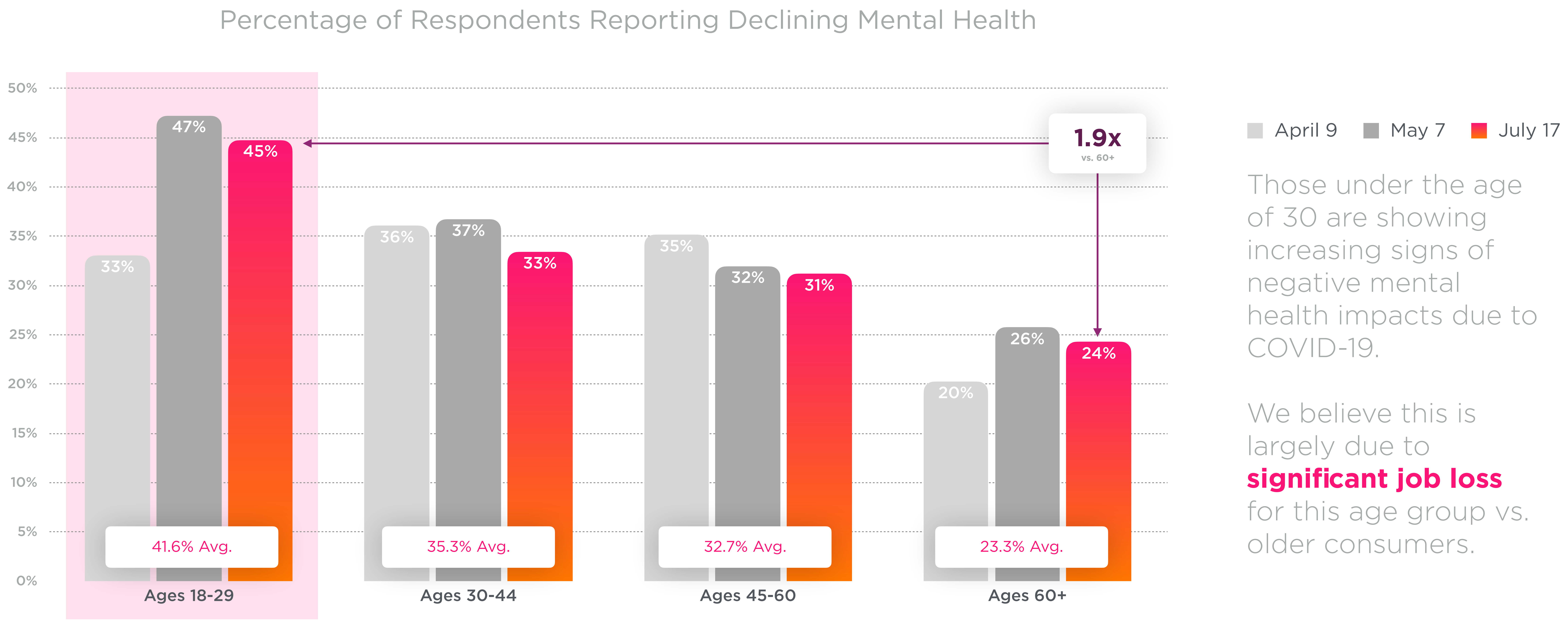
OF ALL RESPONDENTS

Say that their **physical health has declined** since being impacted by Coronavirus

Q: Has your physical health improved or declined since being impacted by Coronavirus?

	RESPONSES BY TIME		
	April 4	May 7	Jul 17
Has Improved	11.4%	13.8%	13.0%
Has Declined	**18.8%**	**32.6%**	**28.7%**

COVID-19 mental health impacts are **worst for the young**.



Those under the age of 30 are showing increasing signs of negative mental health impacts due to COVID-19.

We believe this is largely due to **significant job loss** for this age group vs. older consumers.

IZEA INSIGHT

Marketers may want to consider **adjusting targeting** to focus on consumers ages 30+ near term due to job loss.

Percentage of respondents that have reported they **lost their job.**

	RESPONSES BY TIME	
	May 7	Jul 17
Ages 18-29	**18.2%**	**20.2%**
Ages 30-44	9.1%	15.8%
Ages 45-60	10.6%	8.9%
Ages 60+	5.9%	4.6%
Ages 30+	8.8%	9.9%

2.0x
vs. 30+

46%

OF PARENTS WITH MINOR CHILDREN AT HOME

Say that their family has **grown closer** as a result of being impacted by Coronavirus.

	RESPONSES BY PARENTAL STATUS		
	All Respondents	No Minor Children at Home	Parents with Minor Children at Home
Grown Closer	28.7%	21.0%	**45.6%**
Grown Further	14.6%	17.2%	9.7%
Stayed The Same	**56.8%**	**61.8%**	44.7%

Q : If you had to give up **sex** or **the Internet** while impacted by Coronavirus which would you choose?

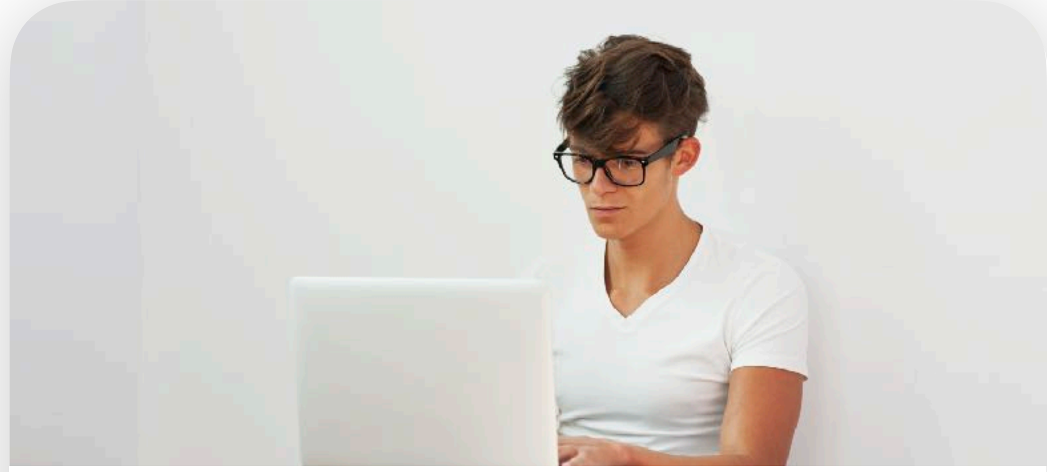
ALL RESPONDENTS

61% MAY 7

53% JUL 17

-8% CHANGE

53% would choose to give up sex.



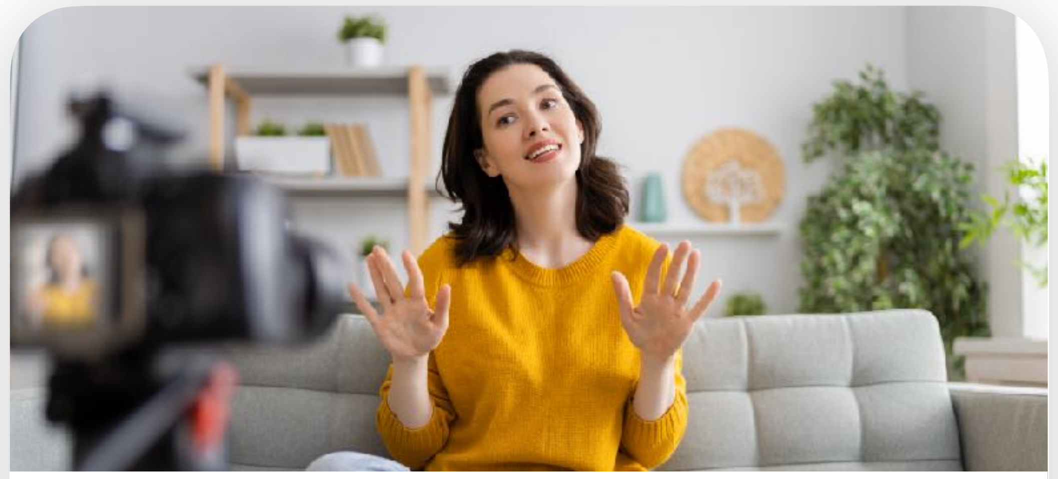
MALES

51% MAY 7

42% JUL 17

-9% CHANGE

42% would choose to give up sex.



FEMALES

66% MAY 7

63% JUL 17

-3% CHANGE

63% would choose to give up sex.

AGES 18-29

70% MAY 7

60% JUL 17

-10% CHANGE

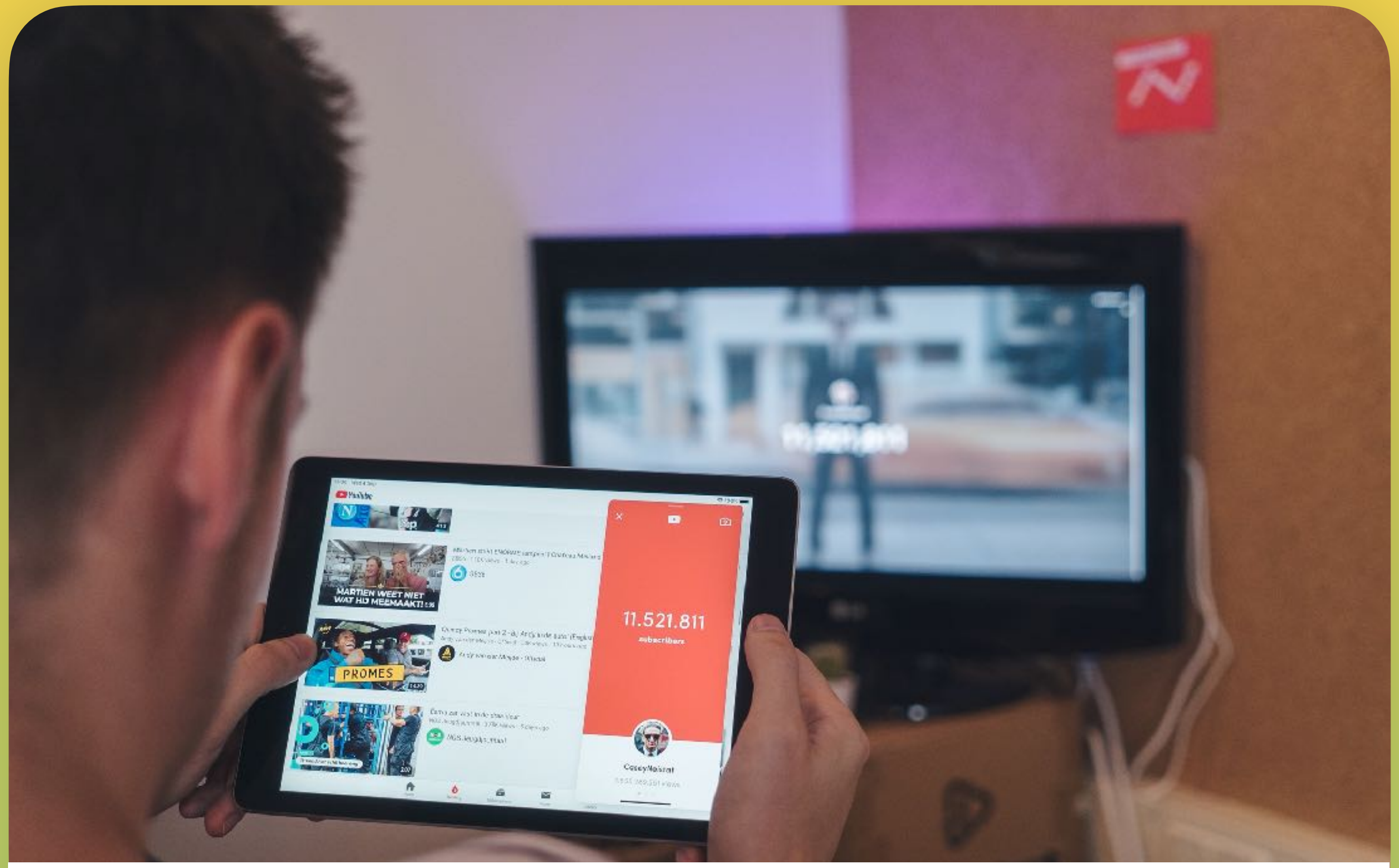
60% would choose to give up sex.

The majority of consumers believe that Internet connectivity is more important than biological connectivity, though there have been some decreases in preference as COVID-19 has dragged on.

Q: Which social media platforms are you using more or less as a result of Coronavirus?

FILTER APPLIED

Those that say they use social media.



YOUTUBE

Significantly More 20.6%

Slightly More 25.8%

46% SAY THEY ARE USING MORE

Stay the Same 34.8%

Slightly Less 2.9%

Significantly Less 3.0%

I Don't Use 12.9%

FACEBOOK

Significantly More 15.1%

Slightly More 19.7%

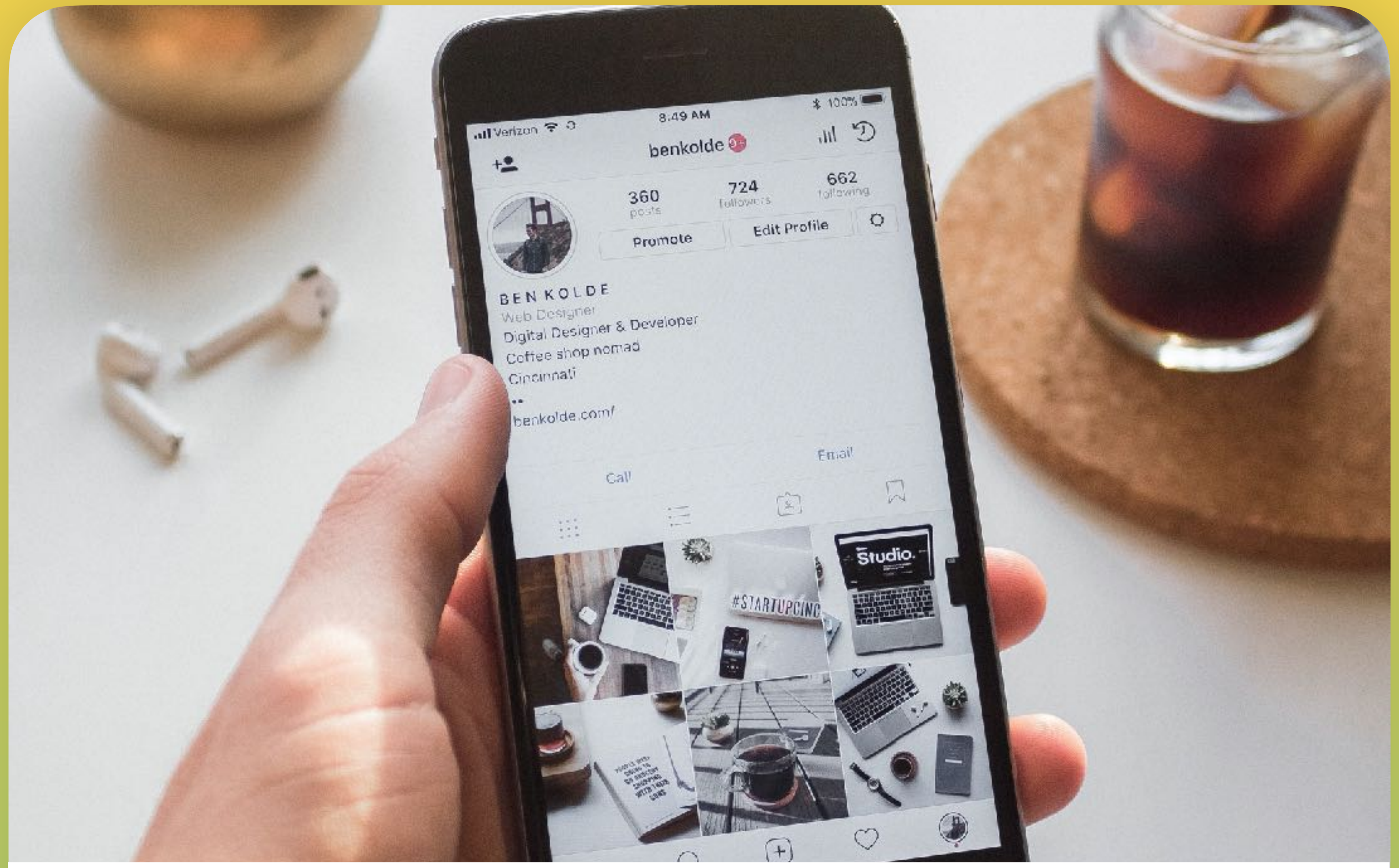
35% SAY THEY ARE USING MORE

Stay the Same 35.1%

Slightly Less 4.9%

Significantly Less 5.1%

I Don't Use 20.1%



INSTAGRAM

Significantly More 6.9%

Slightly More 12.1%

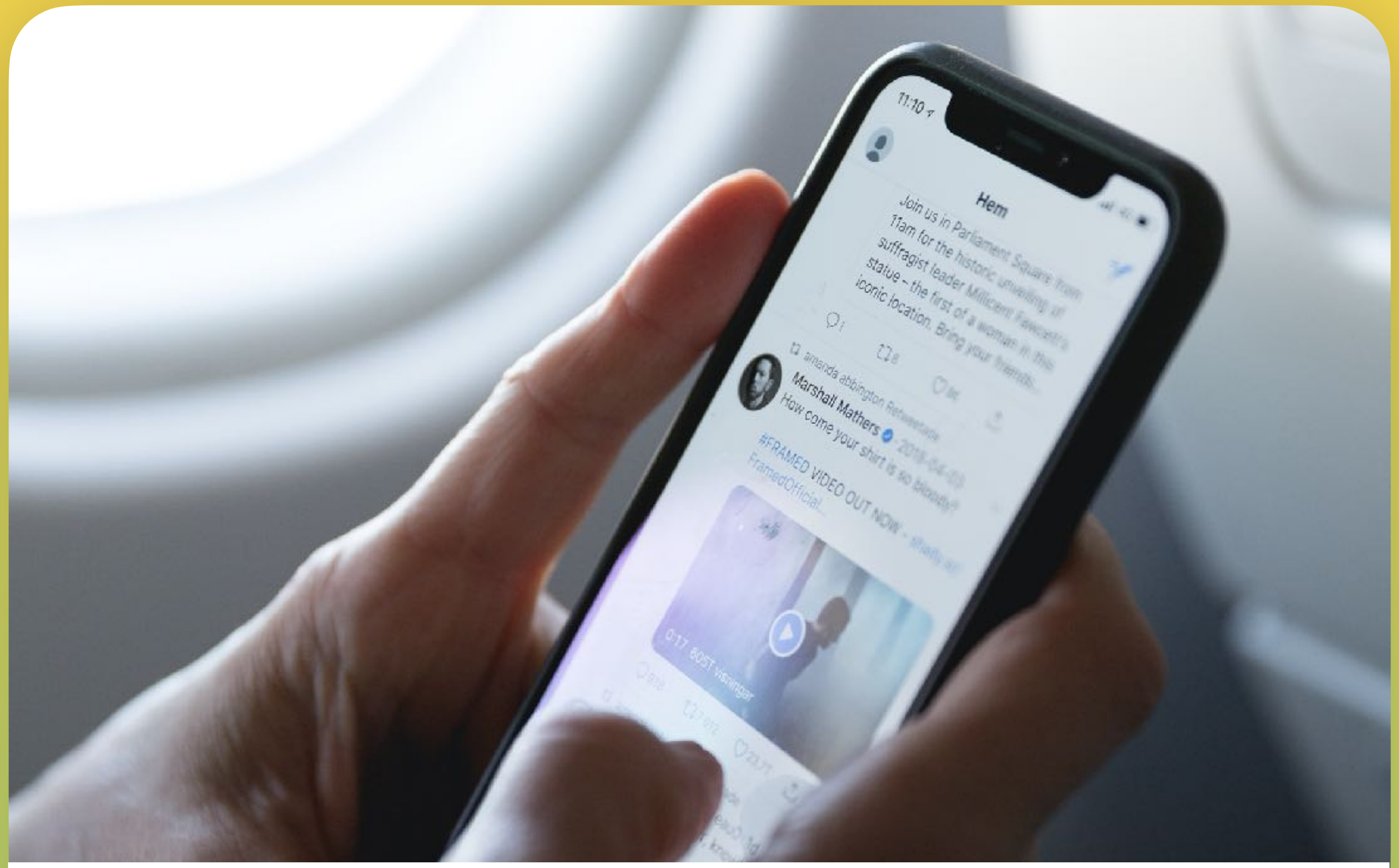
19% SAY THEY ARE USING MORE

Stay the Same 19.6%

Slightly Less 2.1%

Significantly Less 3.8%

I Don't Use 55.5%



TWITTER

Significantly More 5.4%

Slightly More 8.6%

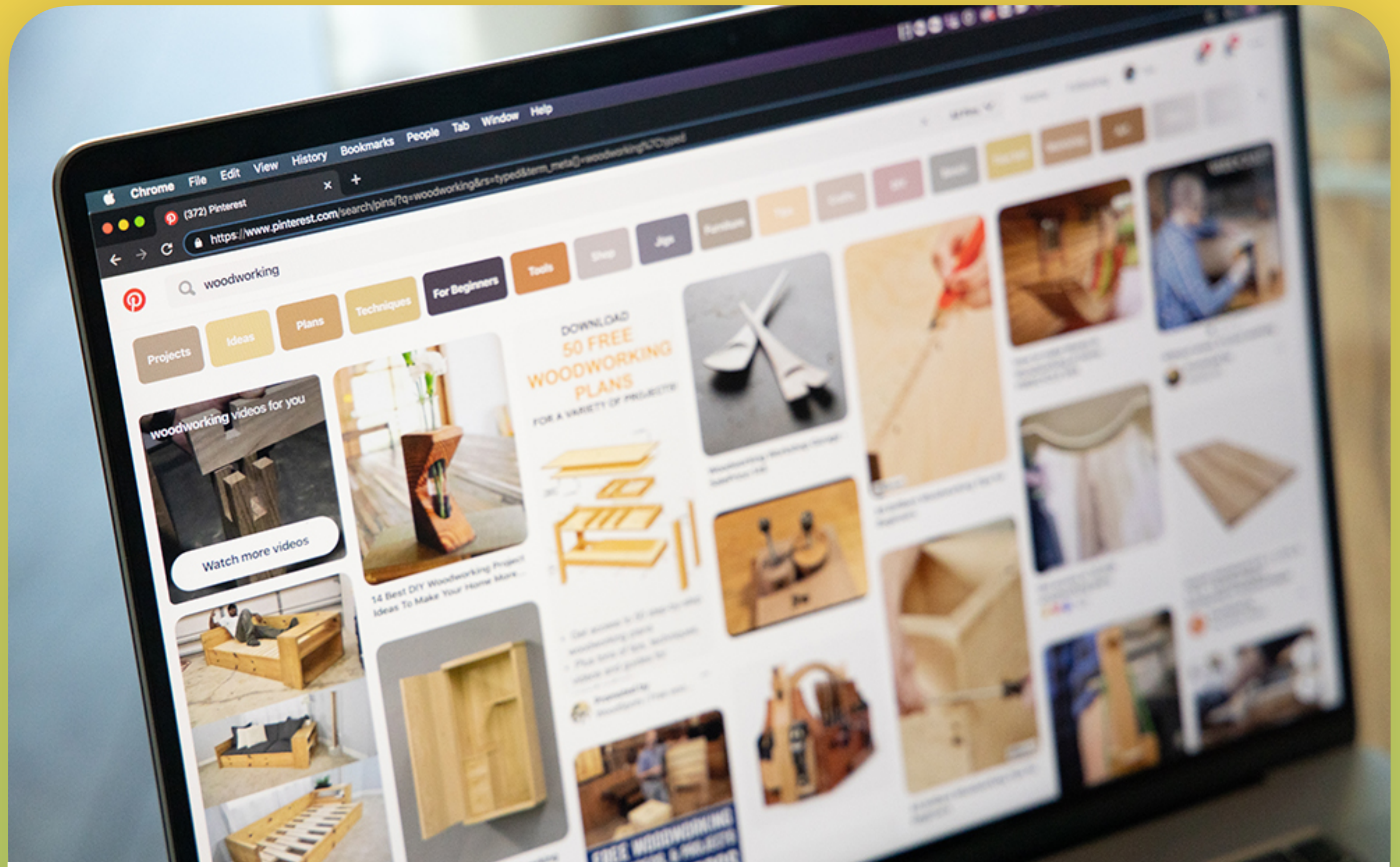
14% SAY THEY ARE USING MORE

Stay the Same 13.6%

Slightly Less 2.5%

Significantly Less 2.5%

I Don't Use 67.1%



PINTEREST

Significantly More 4.2%

Slightly More 9.8%

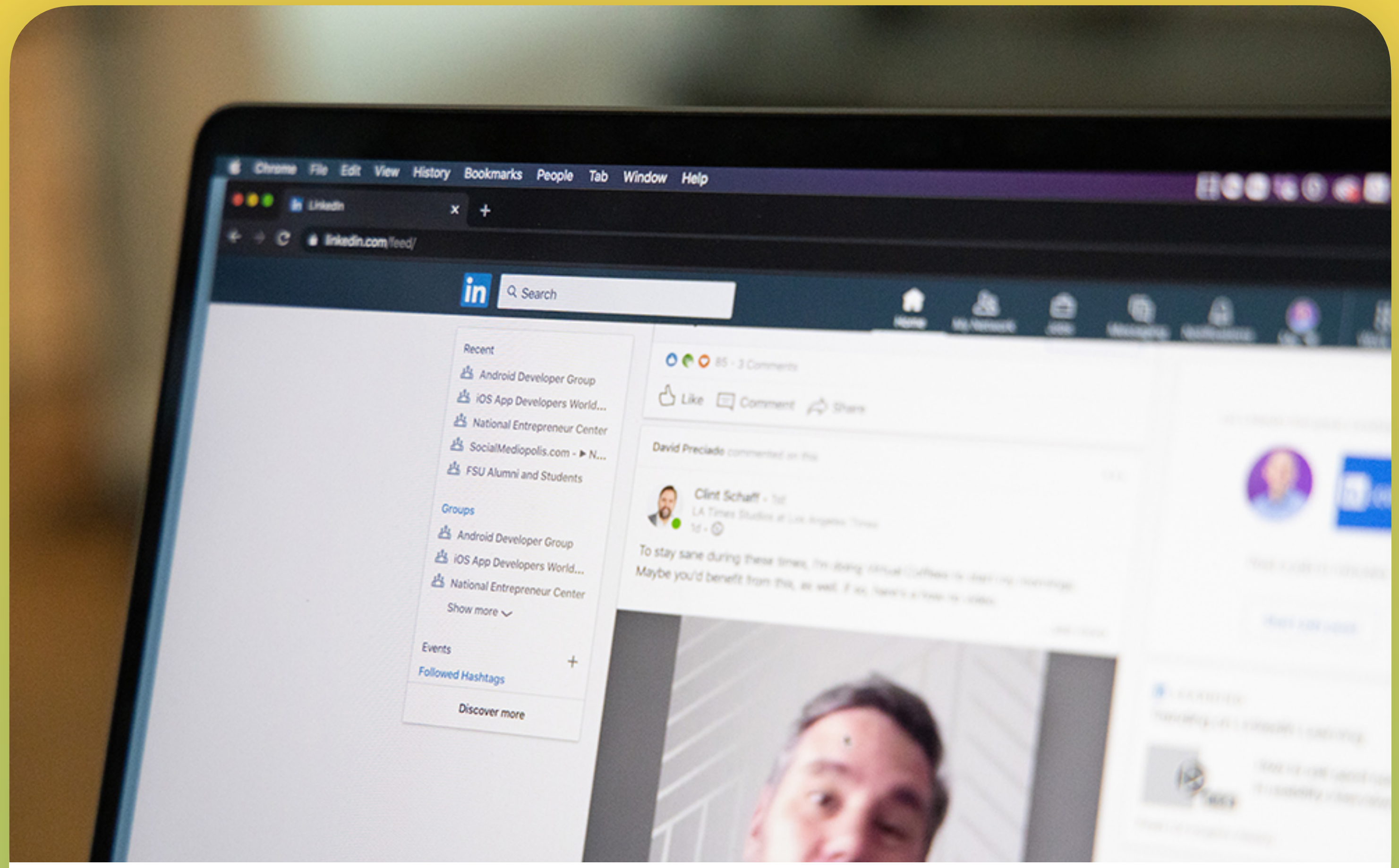
14% SAY THEY ARE USING MORE

Stay the Same 21.1%

Slightly Less 3.7%

Significantly Less 3.4%

I Don't Use 57.8%



LINKEDIN

Significantly More 3.1%

Slightly More 7.2%

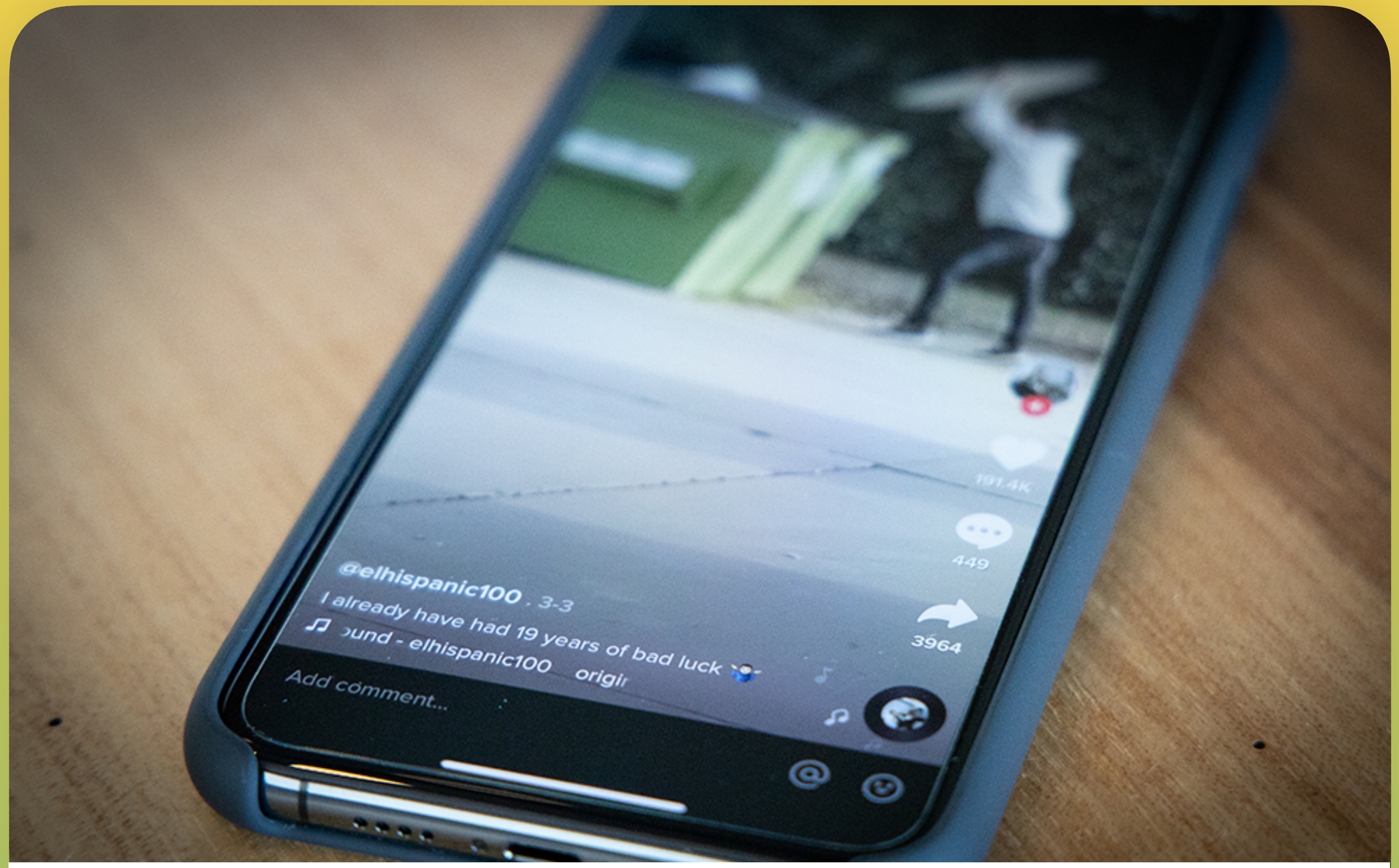
10% SAY THEY ARE USING MORE

Stay the Same 21.7%

Slightly Less 4.3%

Significantly Less 3.4%

I Don't Use 60.3%



TIKTOK

Significantly More 5.6%

Slightly More 3.4%

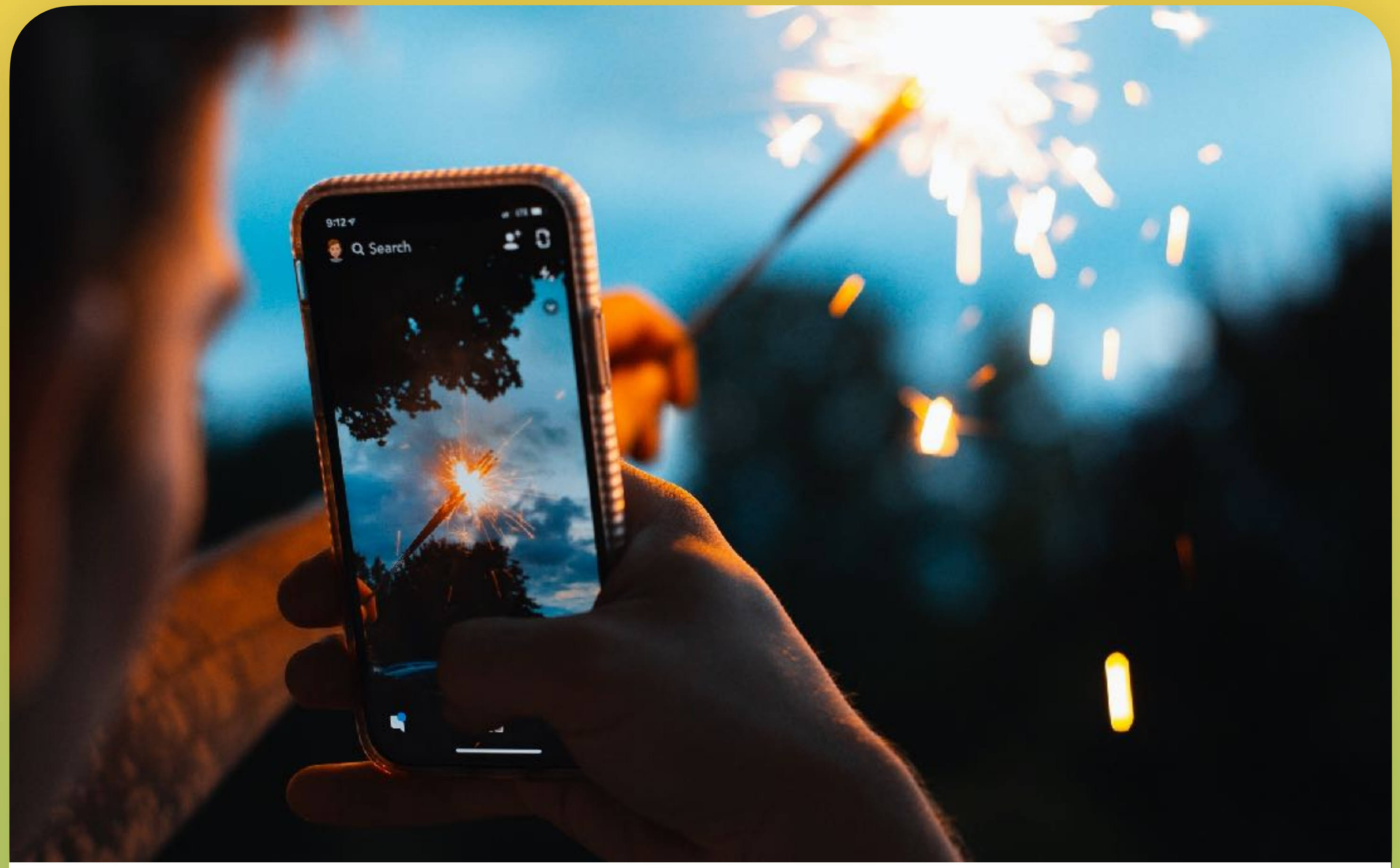
9% SAY THEY ARE USING MORE

Stay the Same 5.2%

Slightly Less 1.3%

Significantly Less 1.9%

I Don't Use 83%



SNAPCHAT

Significantly More 3.3%

Slightly More 4.4%

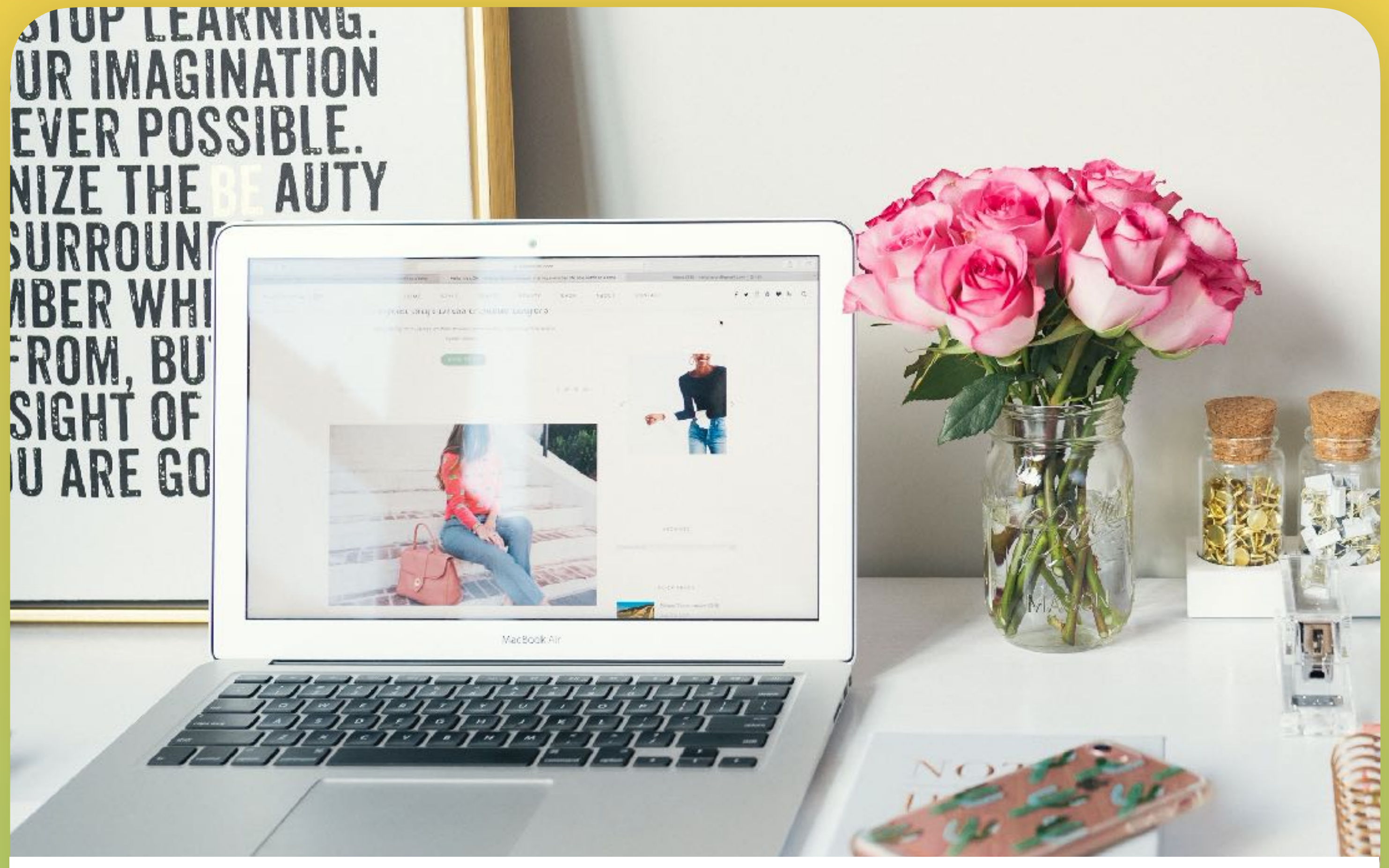
8% SAY THEY ARE USING MORE

Stay the Same 12.6%

Slightly Less 1.8%

Significantly Less 2.3%

I Don't Use 75.6%



BLOGS

Significantly More 1.8%

Slightly More 5.7%

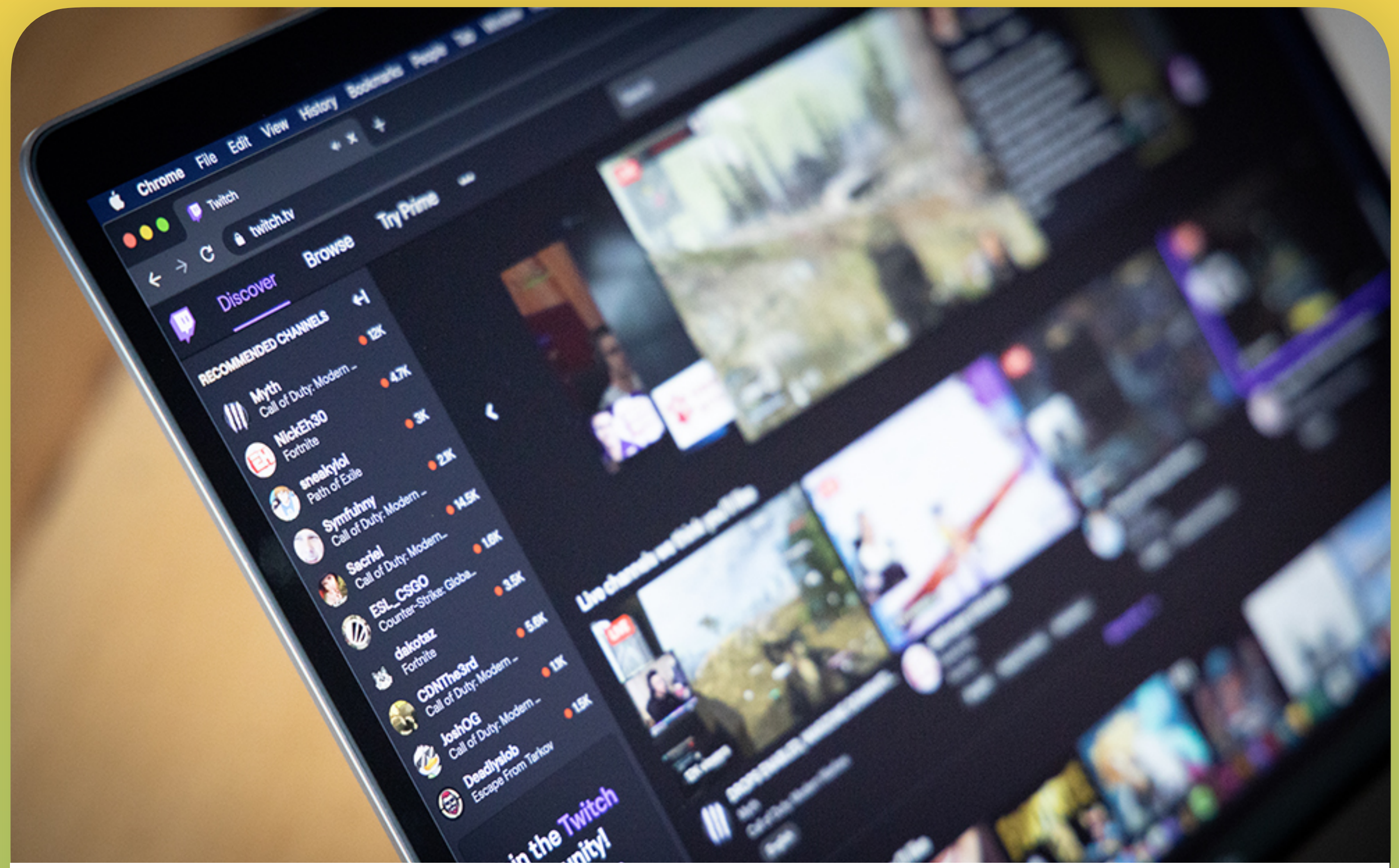
7% SAY THEY ARE USING MORE

Stay the Same 13.7%

Slightly Less 1.6%

Significantly Less 1.4%

I Don't Use 76.2%



TWITCH

Significantly More 1.5%

Slightly More 1.4%

3% SAY THEY ARE USING MORE

Stay the Same 3.8%

Slightly Less .7%

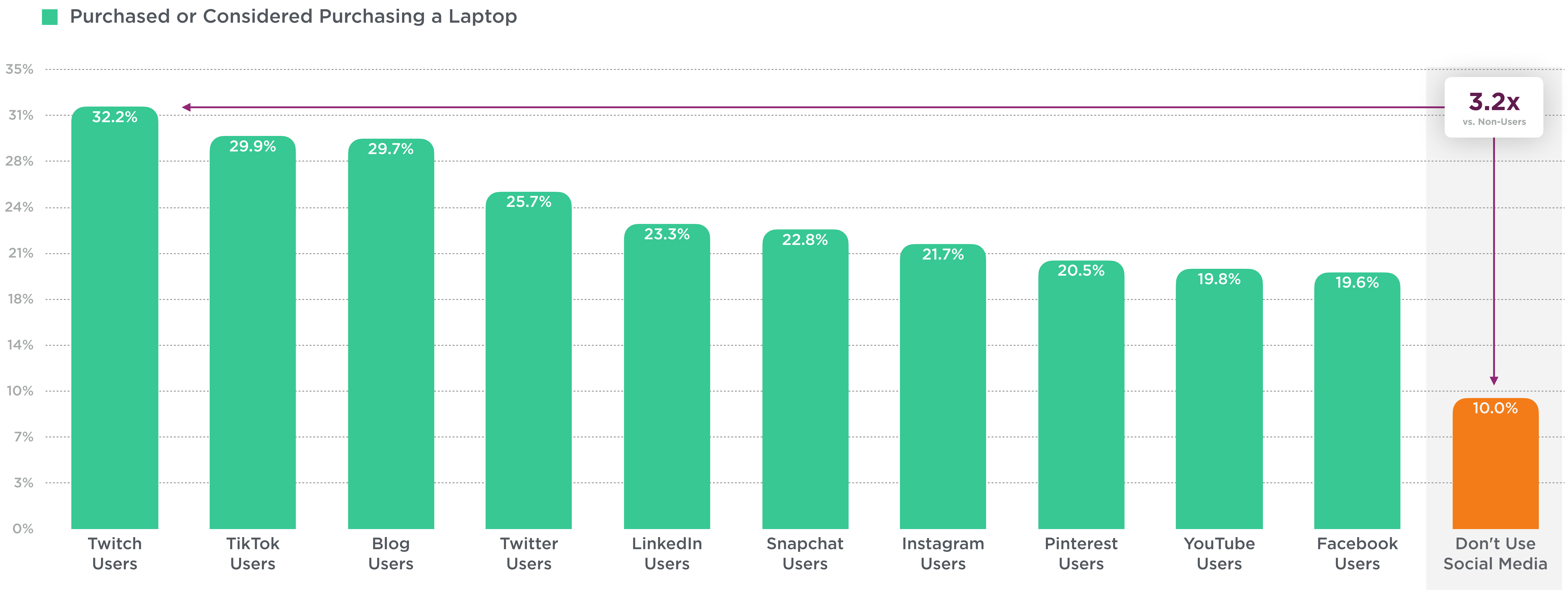
Significantly Less 1.2%

I Don't Use 60.3%

% of Consumers who indicated **decreased** Social Platform usage since being impacted by COVID-19

	All Ages	18-44
Facebook	**10.0%**	**11.1%**
LinkedIn	7.7%	7.7%
Pinterest	7.1%	6.5%
YouTube	5.9%	4.6%
Instagram	5.8%	7.9%
Twitter	5.3%	6.1%
Snapchat	4.1%	4.2%
TikTok	3.1%	4.8%
Blogs	2.7%	2.3%
Twitch	1.9%	2.1%

Q: Have you purchased or do you think you may purchase a **laptop computer** while being impacted by Coronavirus?

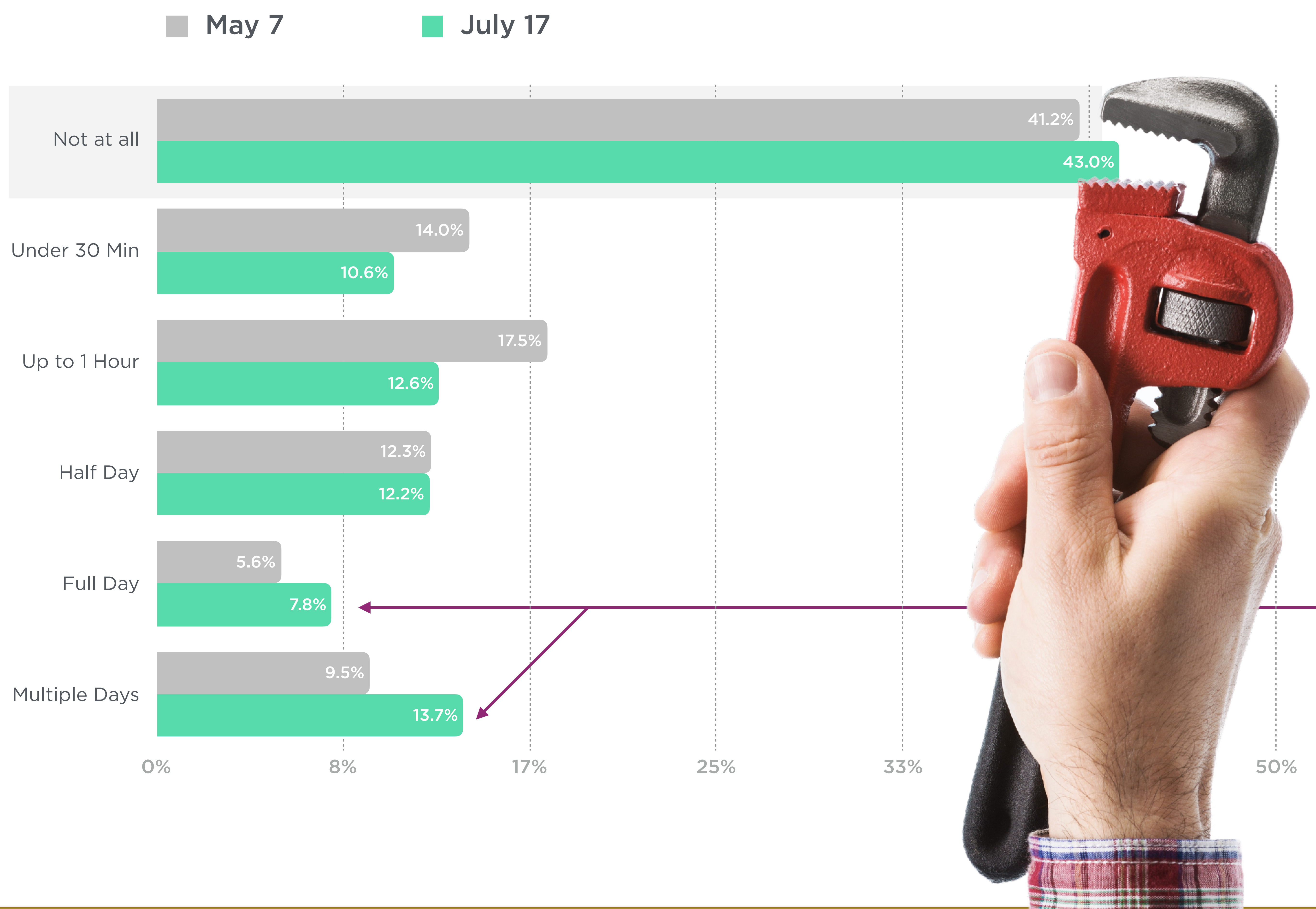


Q: Have you **tried any new products or brands** since you have been impacted by Coronavirus?

	1-2 NEW BRANDS	3-5 NEW BRANDS	6+ NEW BRANDS	BUT OPEN TO	& NOT OPEN TO
	HAVE TRIED	HAVE TRIED	HAVE TRIED	HAVEN'T TRIED	HAVEN'T TRIED
APR 9	30%	13%	3%	36%	18%
JUL 17	27%	15%	6%	35%	17%

Consumers are very willing to try new brands, creating an opportunity for up and coming challengers. **7.5% of those 18-29** have tried **6+** new brands since COVID-19.

Q: What is **the timeframe** that you would allow a third-party professional into your home such as delivery services, floor installation teams, etc. at this time?



43%

OF ALL RESPONDENTS

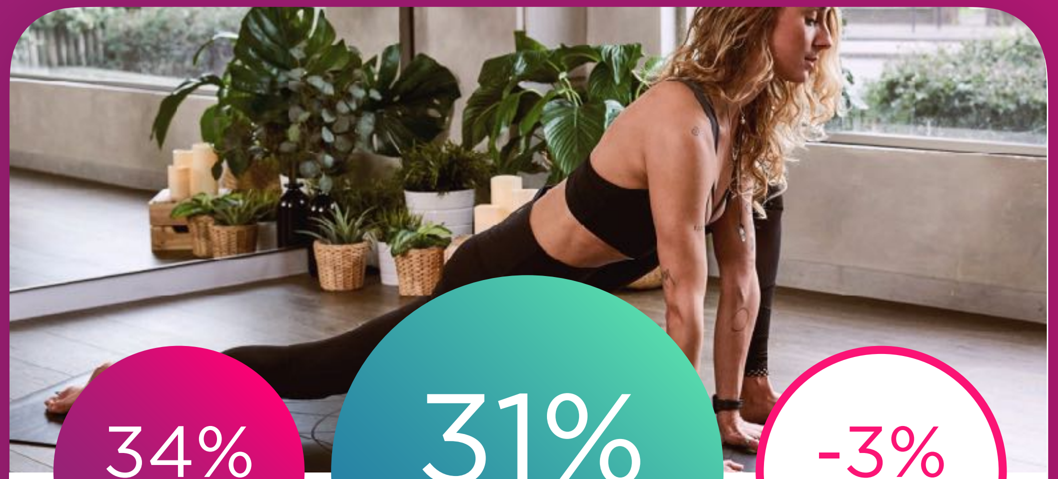
Say they **would not** allow a third party professional in their house at this time.

There has been a meaningful increase in those willing to allow **full day+** visits.

Q: What services do you **traditionally outsource** that you've taken on yourself since quarantine?

54% MAY 7 | 45% JUL 17 | -9% CHANGE

HAIRCARE



34% MAY 7 | 31% JUL 17 | -3% CHANGE

PERSONAL TRAINING

27% MAY 7 | 20% JUL 17 | -7% CHANGE

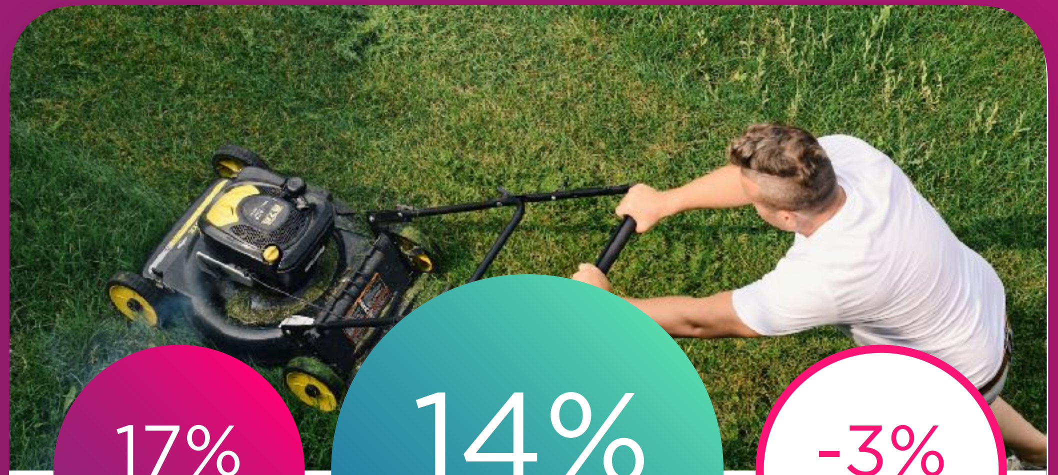
NAIL SERVICES

26% MAY 7 | 24% JUL 17 | -2% CHANGE

CAR WASHING

25% MAY 7 | 22% JUL 17 | -3% CHANGE

HOME CLEANING

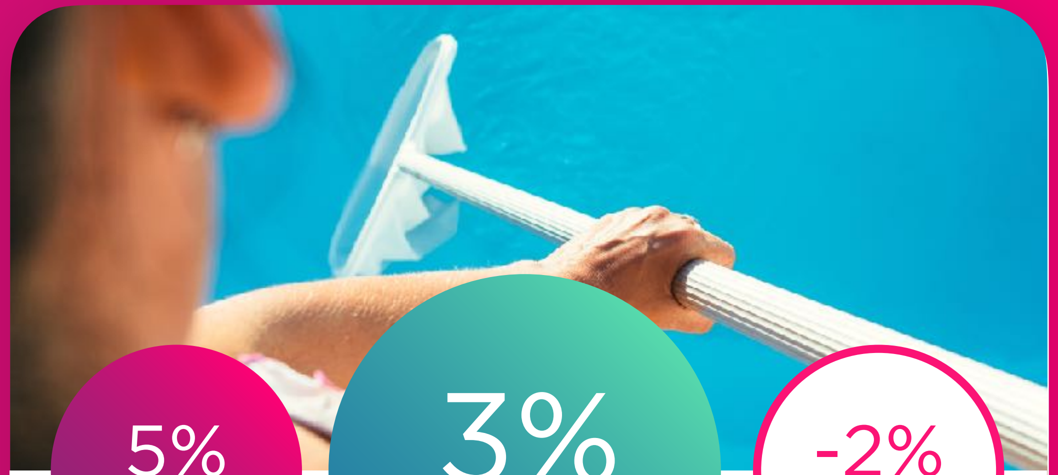


17% MAY 7 | 14% JUL 17 | -3% CHANGE

LAWN/GARDEN CARE

14% MAY 7 | 12% JUL 17 | -2% CHANGE

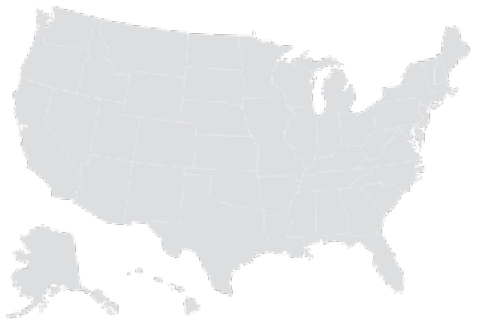
CAR MAINTENANCE



5% MAY 7 | 3% JUL 17 | -2% CHANGE

POOL CARE

Consumer demand created by COVID-19 changes in behavior:



209M
U.S. Consumers
Ages 18+

X  **45%** WHO ARE NOW CARING FOR THEIR HAIR = **94M** WHO MAY NEED **HAIRCARE EQUIPMENT**

X  **31%** WHO ARE NOW WORKING OUT AT HOME = **65M** WHO MAY NEED **WORKOUT EQUIPMENT**

X  **24%** WHO ARE NOW WASHING THEIR CAR = **50M** WHO MAY NEED **CAR CARE EQUIPMENT**

X  **14%** WHO ARE NOW CARING FOR THIER LAWN = **29M** WHO MAY NEED **LAWN CARE EQUIPMENT**

IZEA INSIGHT

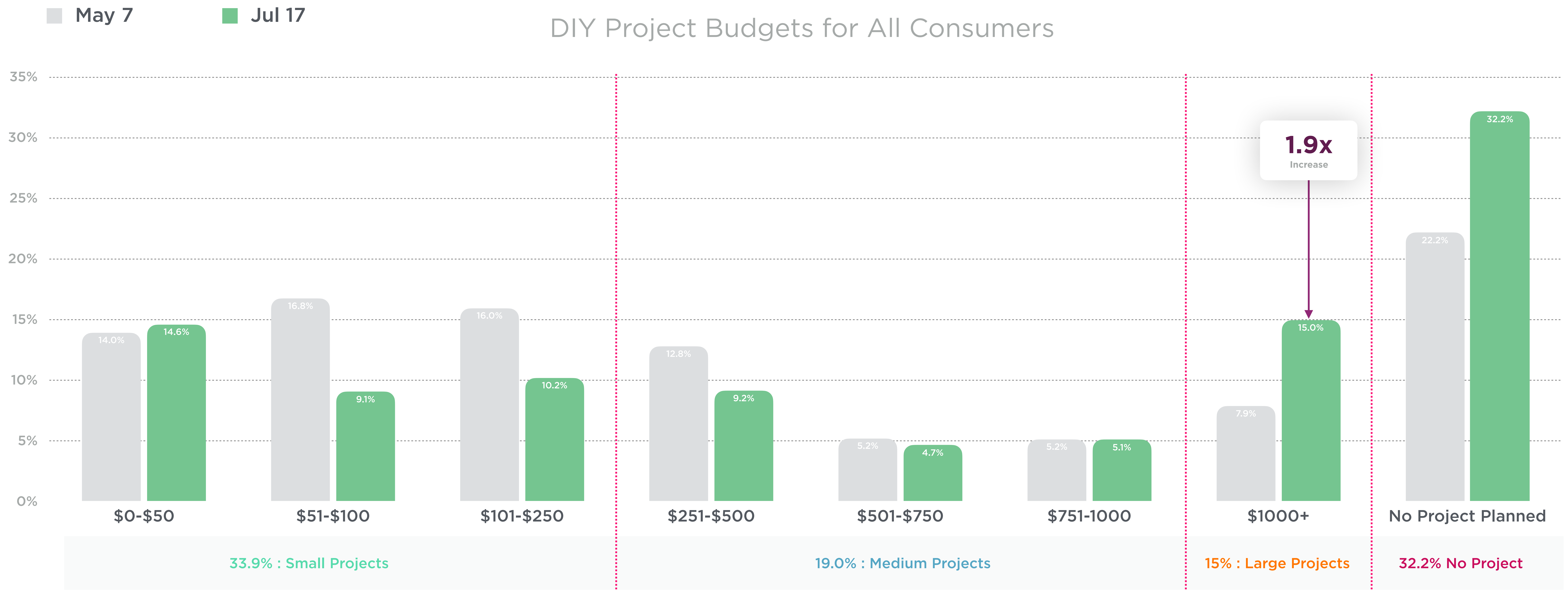
Consumers are starting to visit local businesses again, but the shift to home beauty and fitness services remains strong.

AN OPPORTUNITY FOR BRANDS TO:

- Take advantage of the near term shift in behaviors to develop long term customer behaviors
- Educate consumers about the cost benefits of DIY over outsourced service solutions
- Partner with influencers to share tips and tricks that yield better DIY results

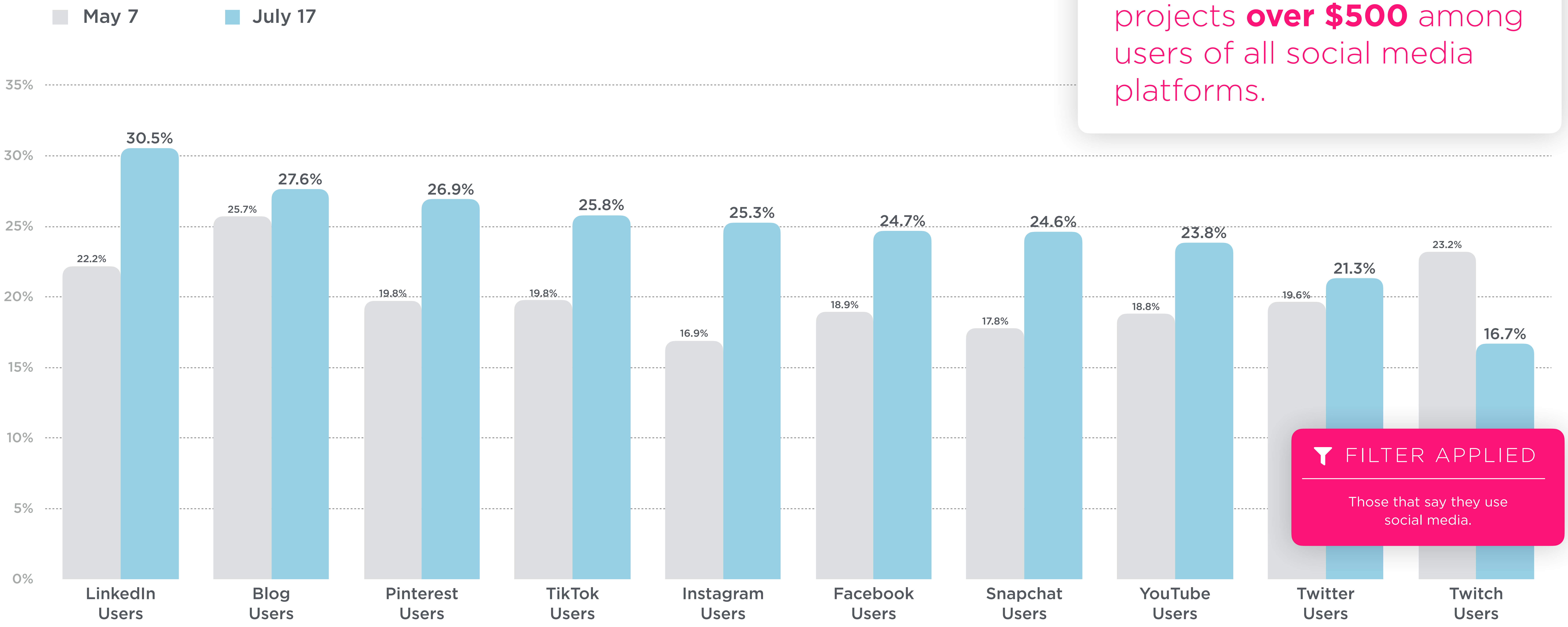
Q: How much money are you willing to spend on a **DIY or home improvement project** at this time?

A: The majority of consumers plan to spend less than $250 on a DIY project.



Those planning to spend **over $500 on a DIY project** by social media platform:

There has been a general increase in interest for DIY projects **over $500** among users of all social media platforms.



FILTER APPLIED

Those that say they use social media.

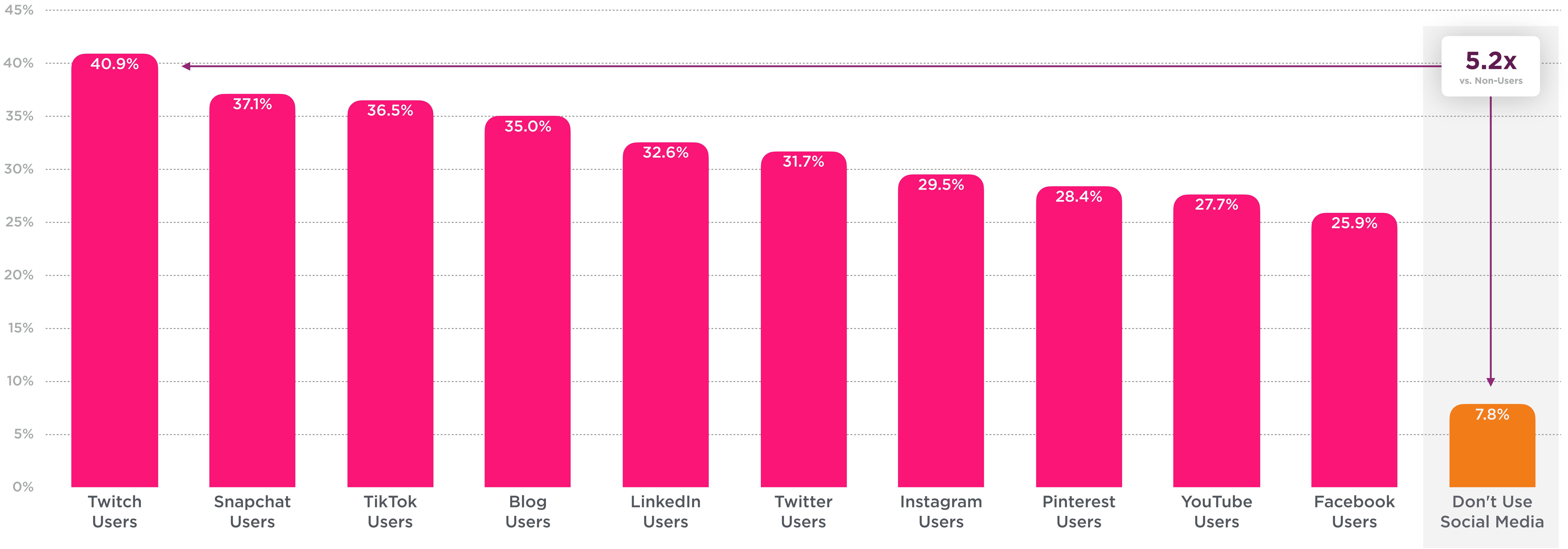
67%

OF ALL RESPONDENTS

Say they are **spending more time online** since being impacted by Coronavirus.

	RESPONSES BY AGE GROUP				
	All	18-29	30-44	45-60	60
Significantly More	**32.0%**	**47.8%**	**34.6%**	**28.2%**	25.5%
Slightly More	35.1%	29.1%	34.1%	36.1%	**38.2%**
The Same	28.7%	16.4%	28.5%	32.7%	32.5%
Slightly Less	2.2%	3.0%	1.7%	1.0%	2.6%
Significantly Less	2.0%	3.7%	1.1%	2.0%	1.2%

Q: Have you **upgraded** or considered upgrading your **Internet service or WIFI network** since being impacted by Coronavirus?



74%

OF PARENTS WITH MINOR CHILDREN AT HOME

Say they would **rather pay $20** to stream a summer blockbuster movie at home now.

	BY RESPONDENT AGE GROUP					BY PARENTAL STATUS		
	All	18-29	30-44	45-60	60	Parents w/ Children Ages 0-10 at Home	Parents w/ Children Ages 11-17 at Home	No Children at Home
Stream now at home	**57.8%**	**60.5%**	**65.4%**	**60.4%**	44.9%	**78.0%**	**71.4%**	**51.0%**
Delay and watch at theater	42.1%	39.6%	34.6%	39.6%	**55.8%**	22.0%	28.6%	49.0%

ONLY

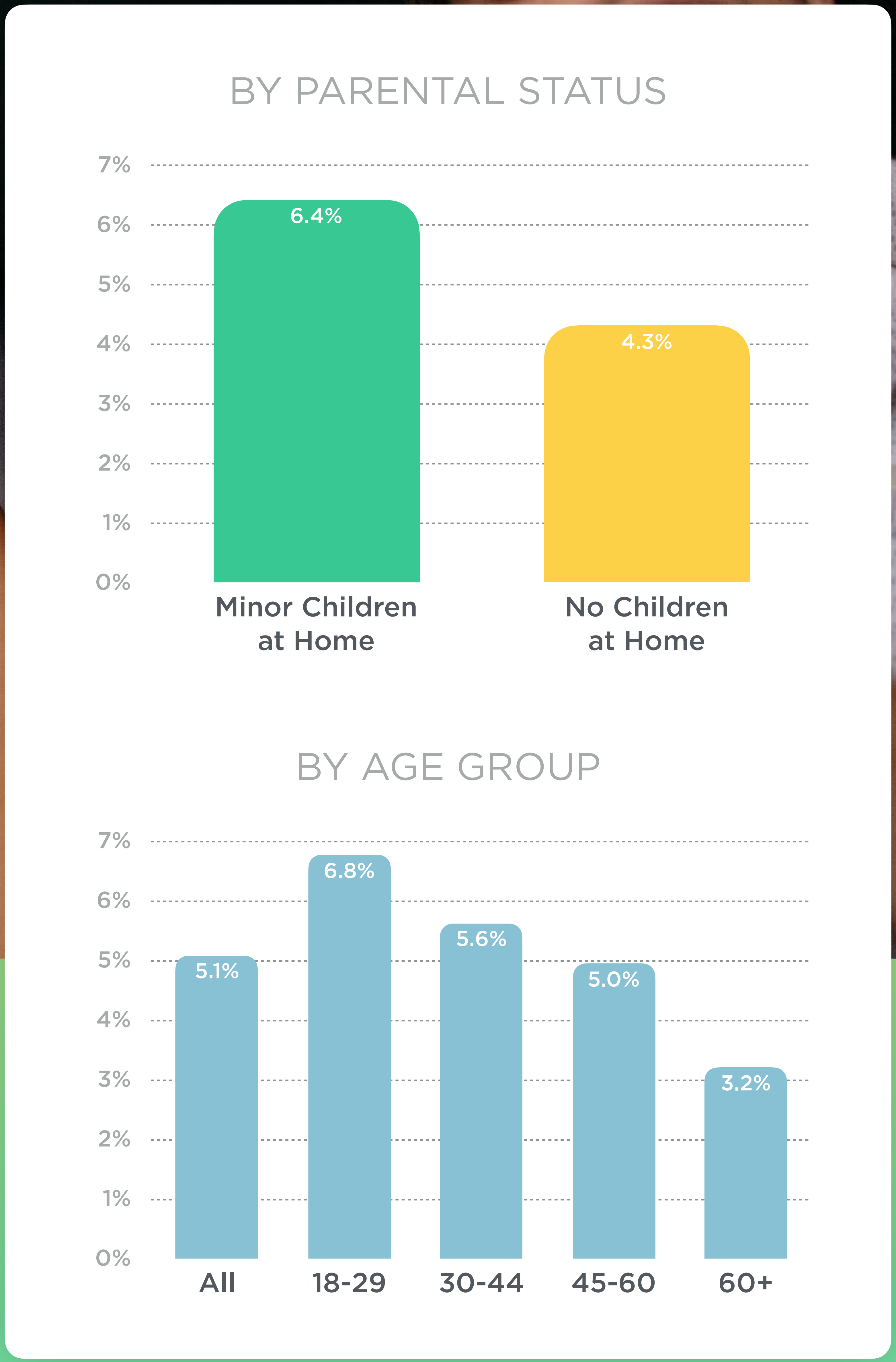
5%

OF ALL RESPONDENTS

13%
MAY 7

-8%
CHANGE

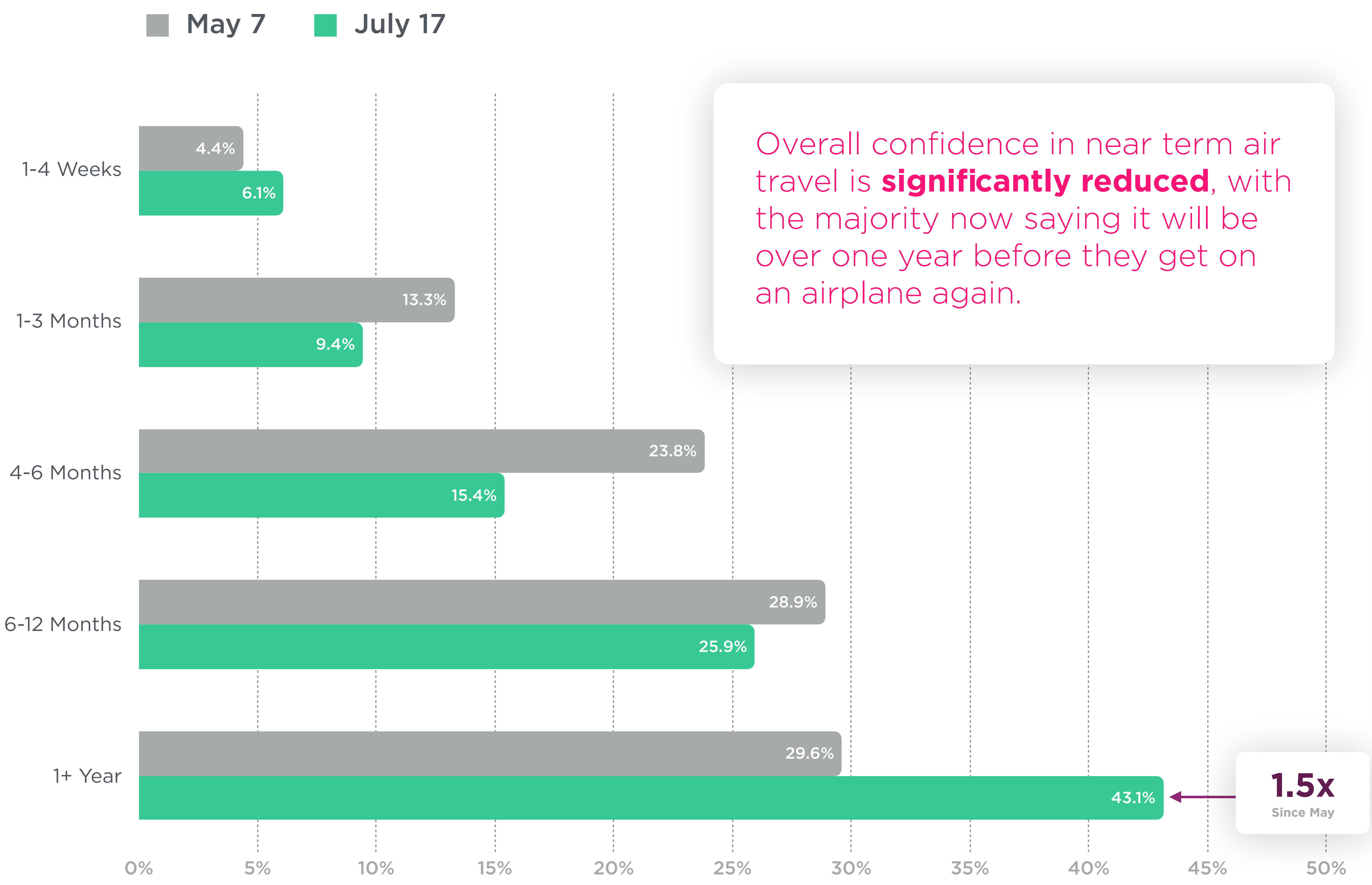
Say that they plan to visit a **movie theater** in the next 1-4 weeks.



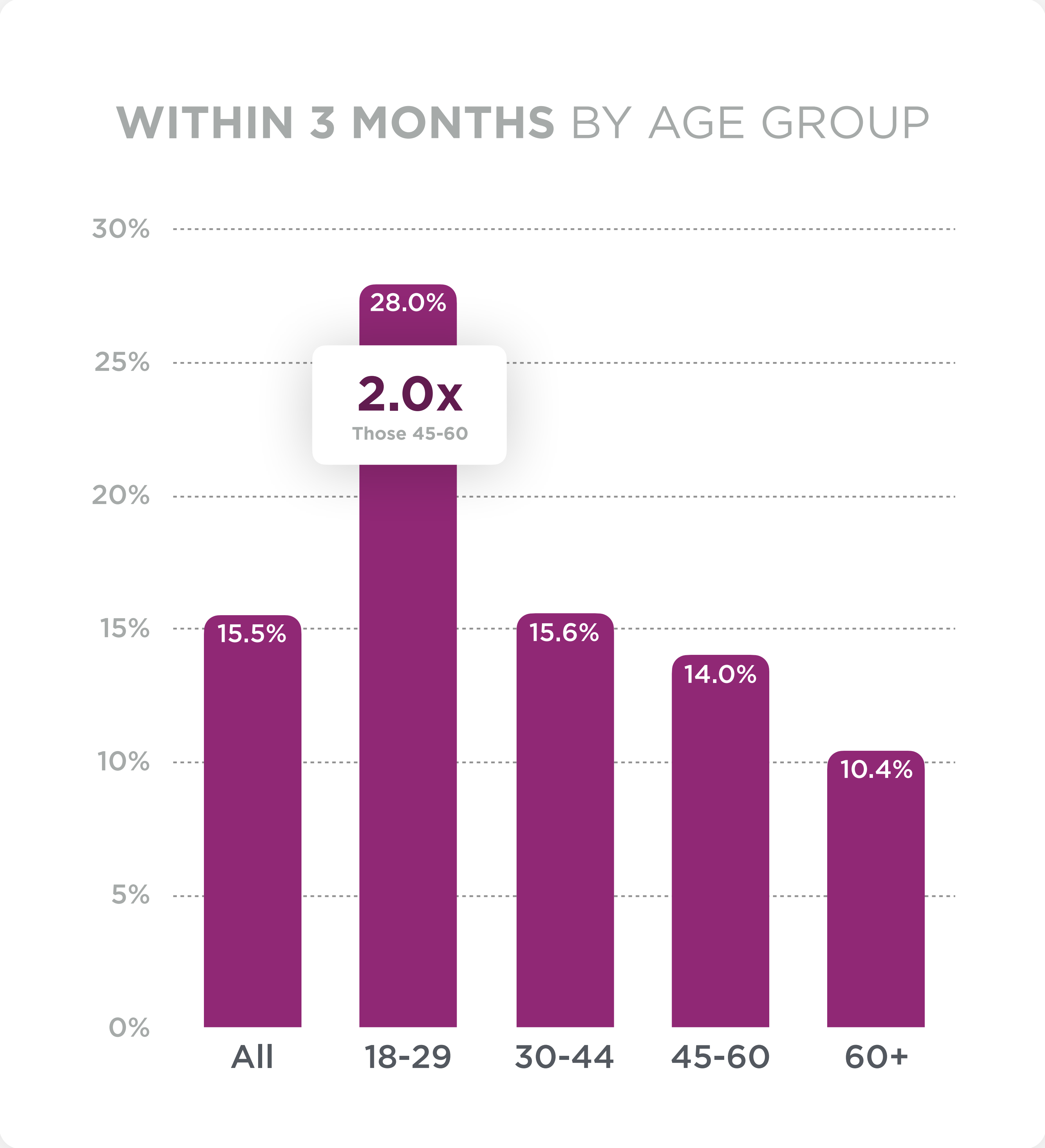
Q: How soon do you think it will be before you **get on an airplane** again?

FILTER APPLIED

Those that say they normally travel by air.



Overall confidence in near term air travel is **significantly reduced**, with the majority now saying it will be over one year before they get on an airplane again.



63%

OF ALL RESPONDENTS

Say that they have **no vacation plans** for the fall.

Travel will be largely limited to **driving distance** this fall.

30%

OF ALL RESPONDENTS

Say that they will **take a road trip.**

IZEA INSIGHT

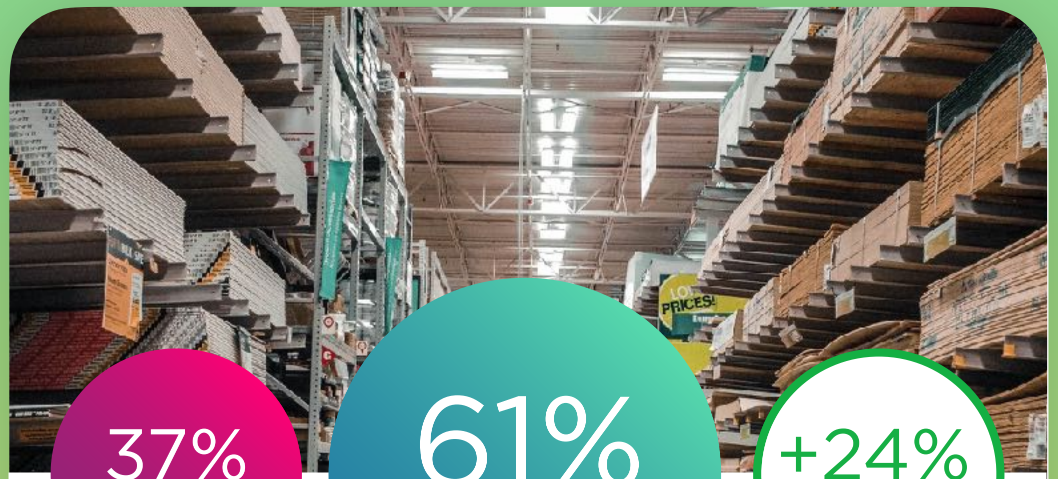
Those companies that rely on air travel should likely market to consumers that are 18-29 years old near term as their confidence in air travel over the next 3 months is **1.8-2.7x** vs. older consumers.

This group is also going to be the most **price sensitive** and will likely require incentives.

Q: What types of local establishments do you plan on visiting in the **next 1-4 weeks**?

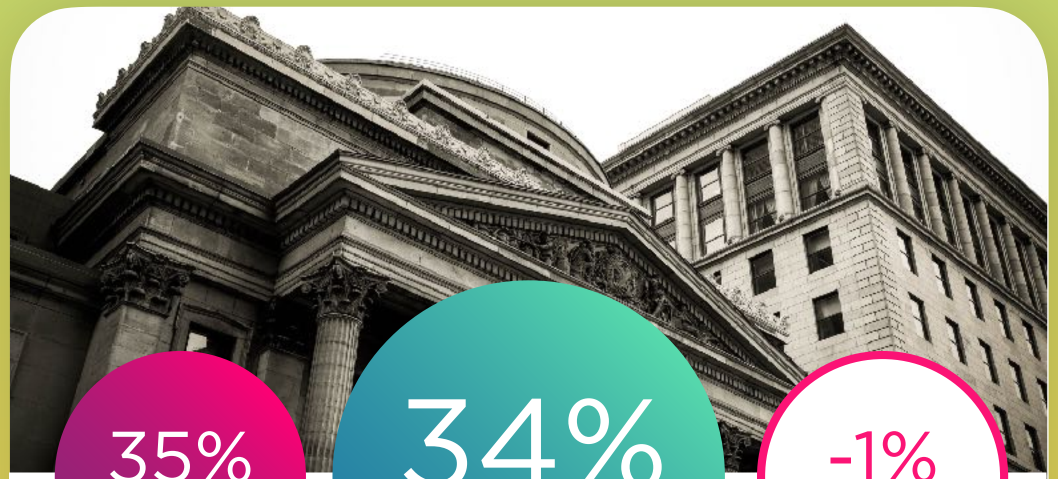
53% MAY 7
65% JUL 17
+12% CHANGE
GAS STATION

43% MAY 7
38% JUL 17
-5% CHANGE
LOCAL RESTAURANT



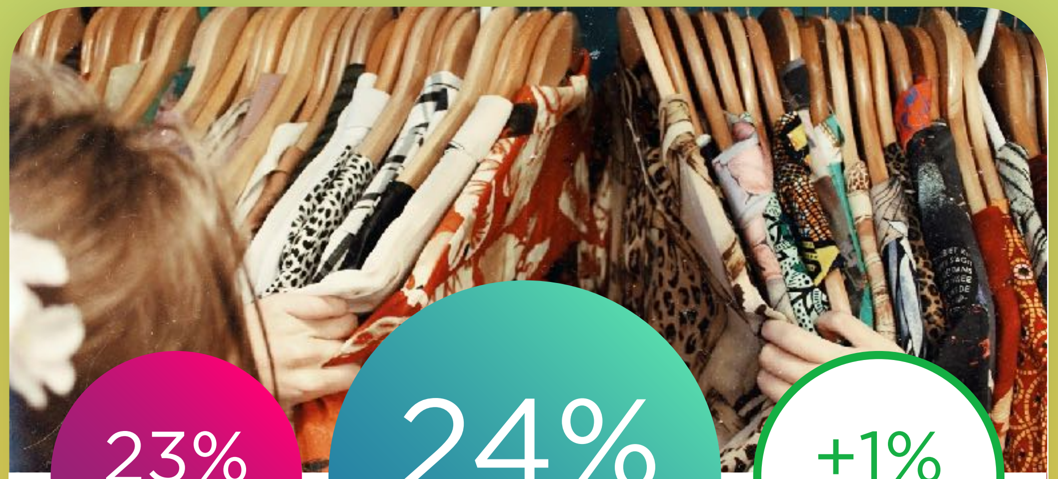
37% MAY 7
61% JUL 17
+24% CHANGE
BIG BOX RETAILER

35% MAY 7
27% JUL 17
-8% CHANGE
HAIR SALON/BARBER

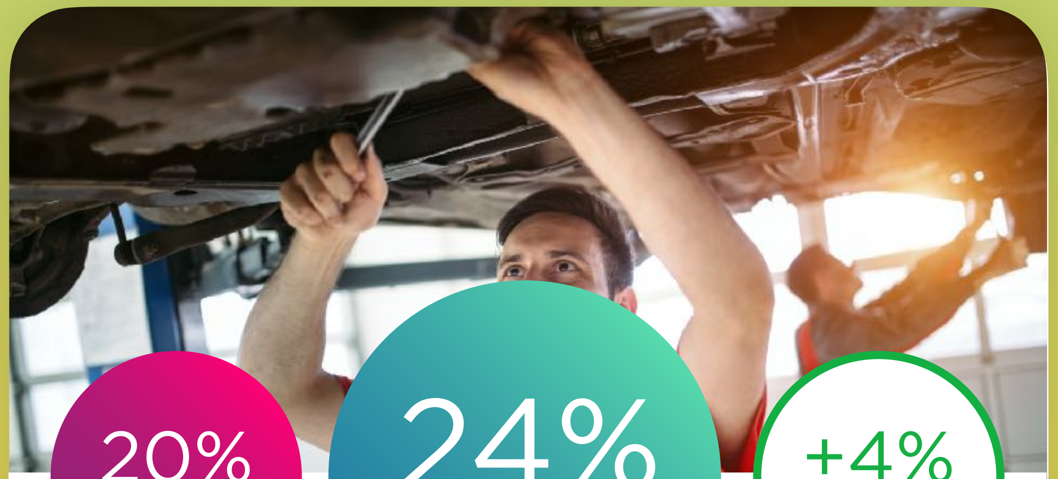


35% MAY 7
34% JUL 17
-1% CHANGE
BANK

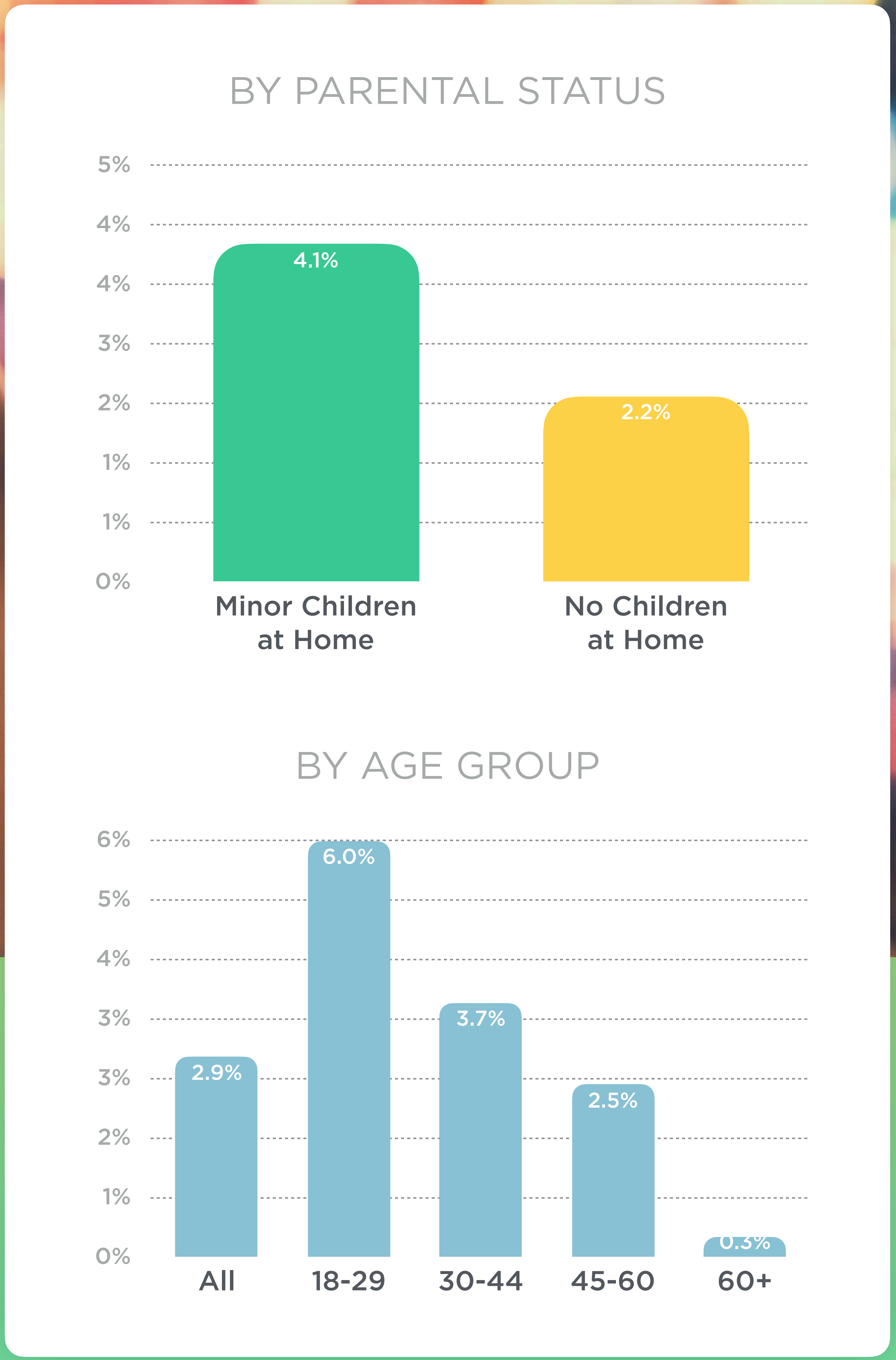
31% MAY 7
20% JUL 17
-11% CHANGE
CHAIN RESTAURANT



23% MAY 7
24% JUL 17
+1% CHANGE
LOCAL RETAILER



20% MAY 7
24% JUL 17
+4% CHANGE
OIL CHANGE SHOP



ONLY

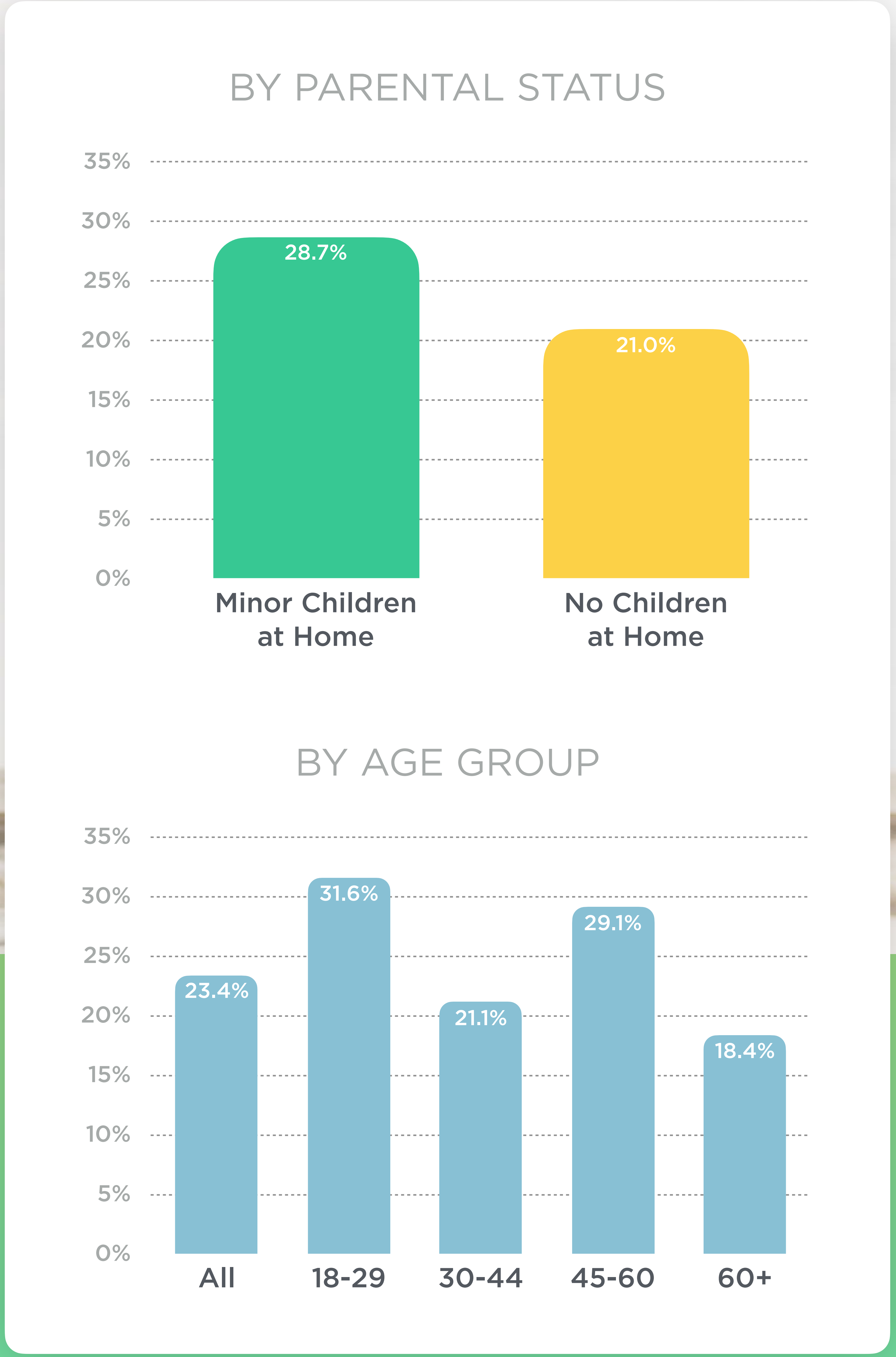
4%

OF PARENTS WITH MINOR CHILDREN AT HOME

9%
MAY 7

-5%
CHANGE

Say that they plan to visit a **theme park** in the next 1-4 weeks.



25%
MAY 7

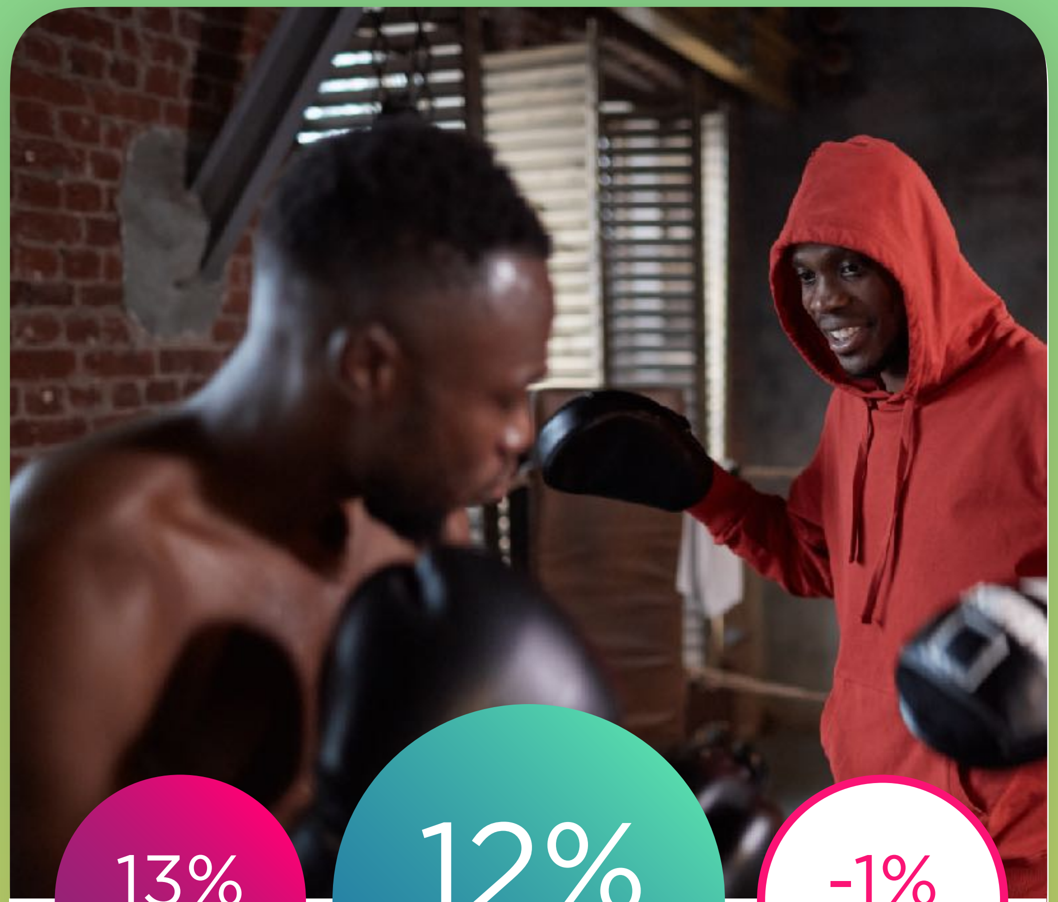
23%

-2%
CHANGE

OF ALL RESPONDENTS

Say that they plan to visit a **beach or park** in the next 1-4 weeks.

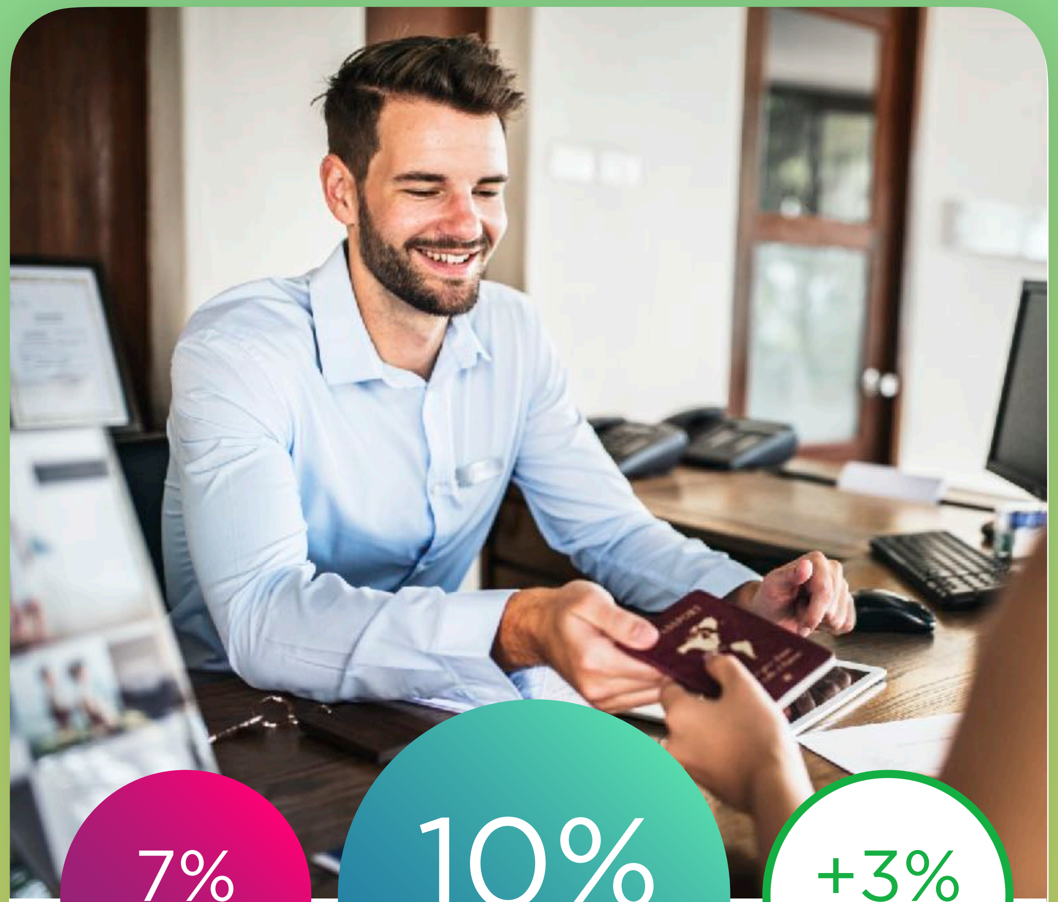
Q: What types of local establishments do you plan on visiting in the **next 1-4 weeks**?



13% MAY 7 | 12% JUL 17 | -1% CHANGE

GYM / FITNESS CLUB

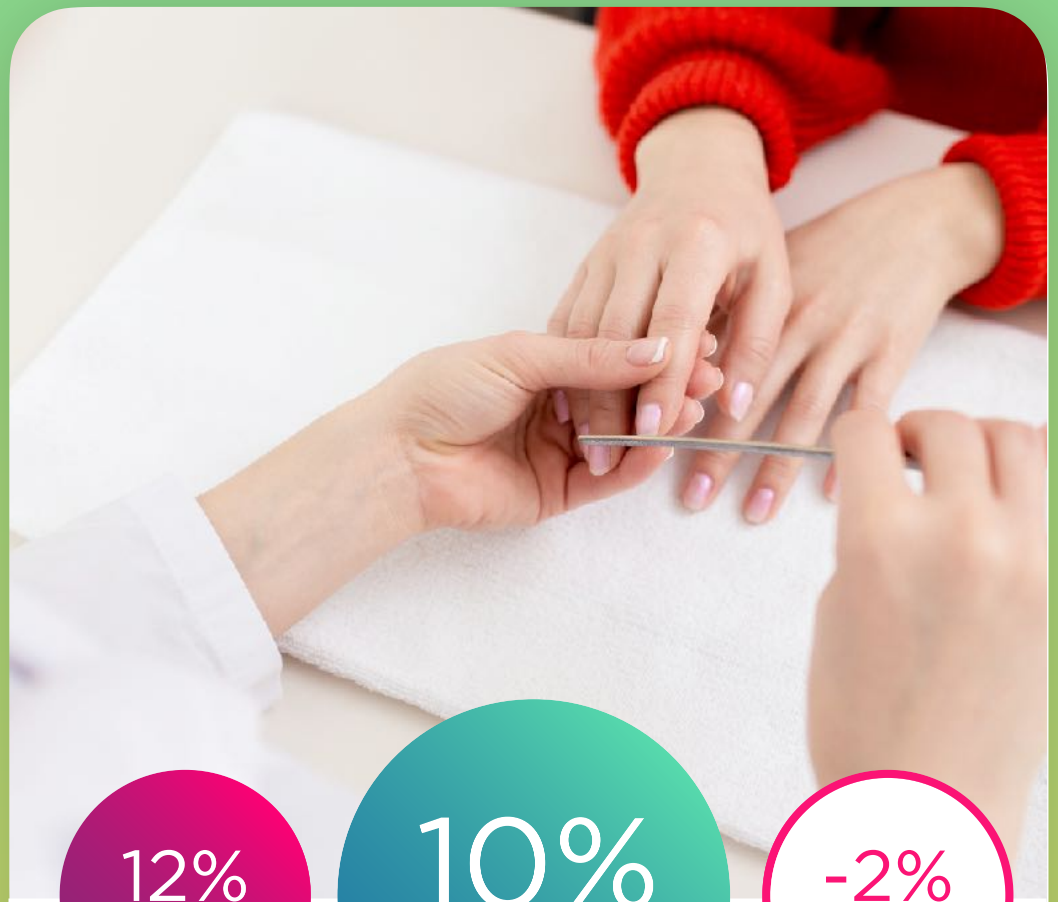
Male	13.3%
Female	9.5%
Ages 18-29	20.0%



7% MAY 7 | 10% JUL 17 | +3% CHANGE

HOTEL

Male	10.2%
Female	8.6%
Ages 18-29	17.5%



12% MAY 7 | 10% JUL 17 | -2% CHANGE

NAIL SALON

Male	1.9%
Female	17.3%
Ages 18-29	23.8%

9% MAY 7 | 9% JUL 17 | 0% CHANGE

BAR

Male	11.0%
Female	6.2%
Ages 18-29	12.5%

75%

OF ALL RESPONDENTS

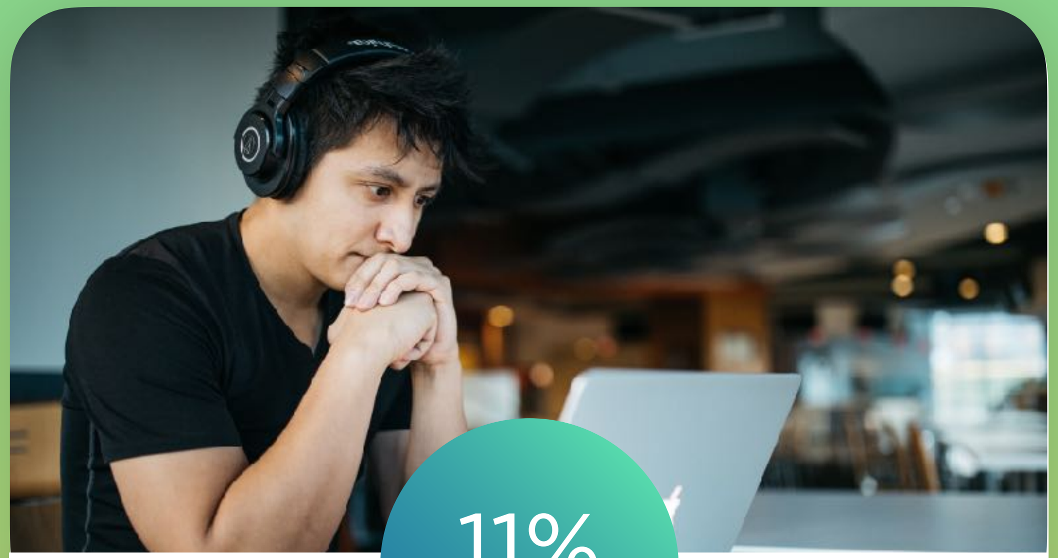
Say that they have purchased items that they consider **"non-essential"** since being impacted by Coronavirus.

Q: Have you purchased any products that you would consider "non-essential" since being impacted by Coronavirus?

	RESPONSES OVER TIME		
	April 9	July 17	% Change
Yes	45.4%	**74.6%**	29.2%
No	**54.6%**	25.3%	-29.3%

Material increase in percentage from April

Q: What type of **electronics** have you purchased or do you think you may purchase while being impacted by Coronavirus?



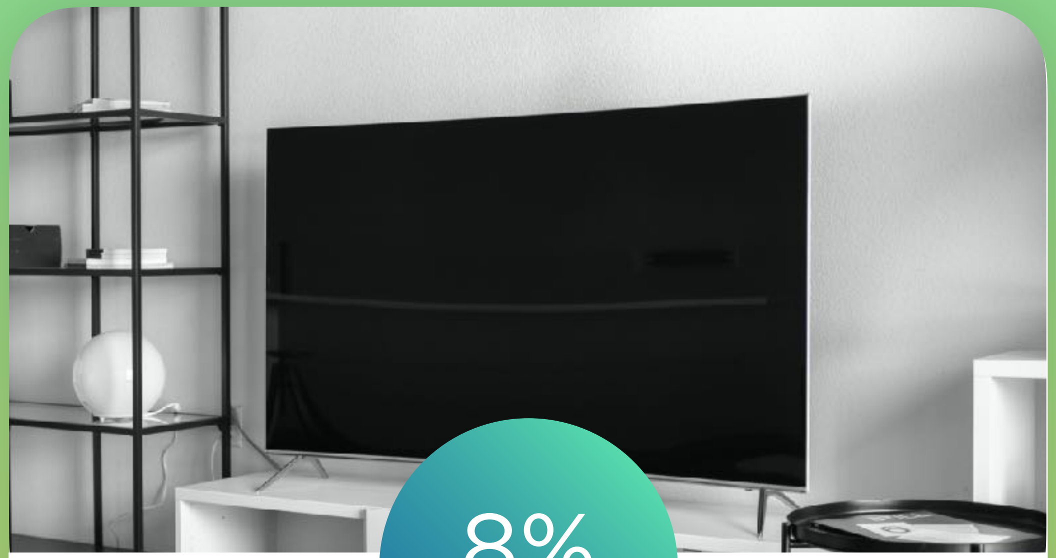
11%
APRIL 9

17%
JULY 17

+6%
CHANGE

HEADPHONES

Male	16.6%
Female	16.7%
Ages 18-29	27.1%



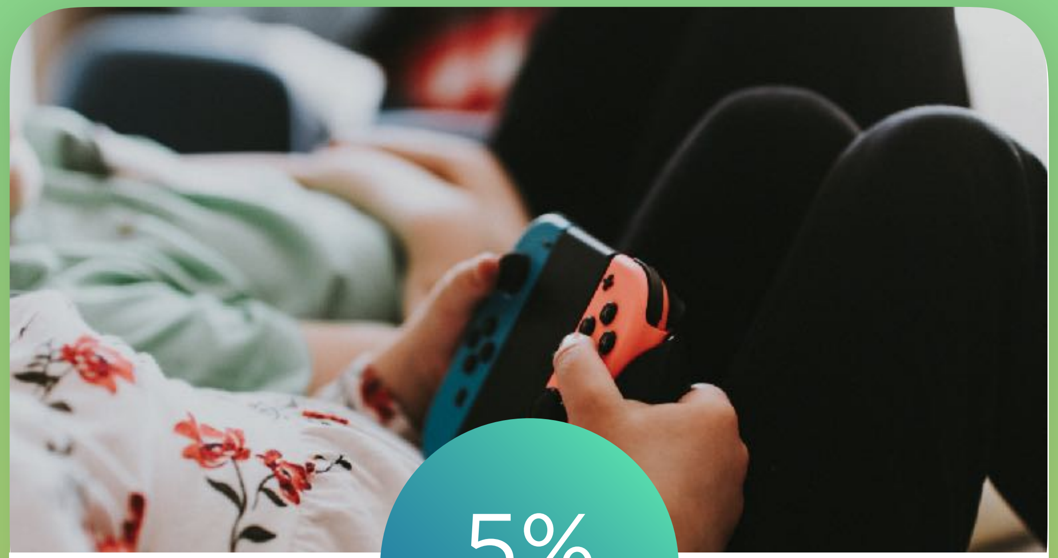
8%
APRIL 9

13%
JULY 17

+5%
CHANGE

TELEVISION

Male	13.3%
Female	11.7%
Ages 18-29	11.3%



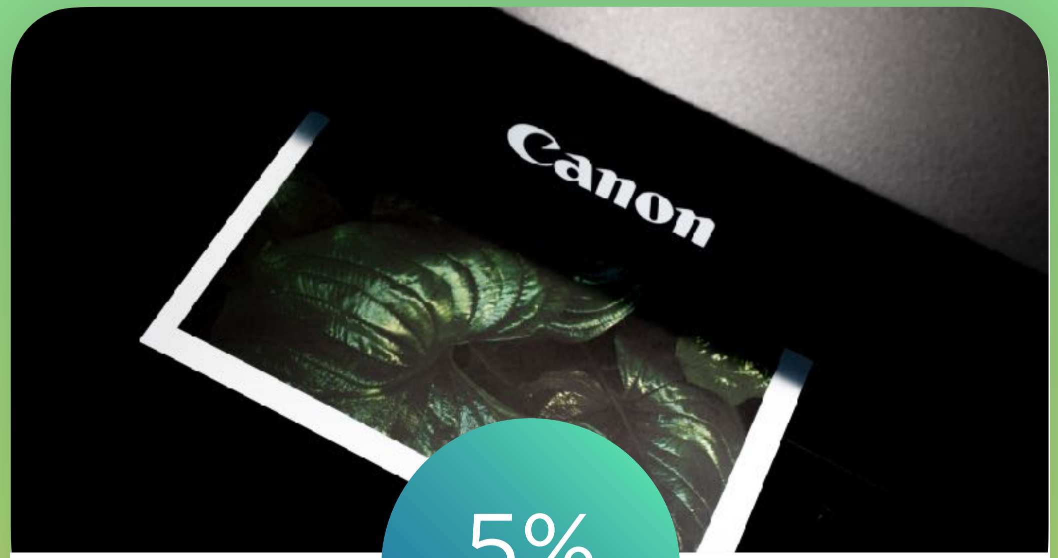
5%
APRIL 9

6%
JULY 17

+1%
CHANGE

GAME CONSOLE

Male	6.9%
Female	5.1%
Ages 18-29	8.3%



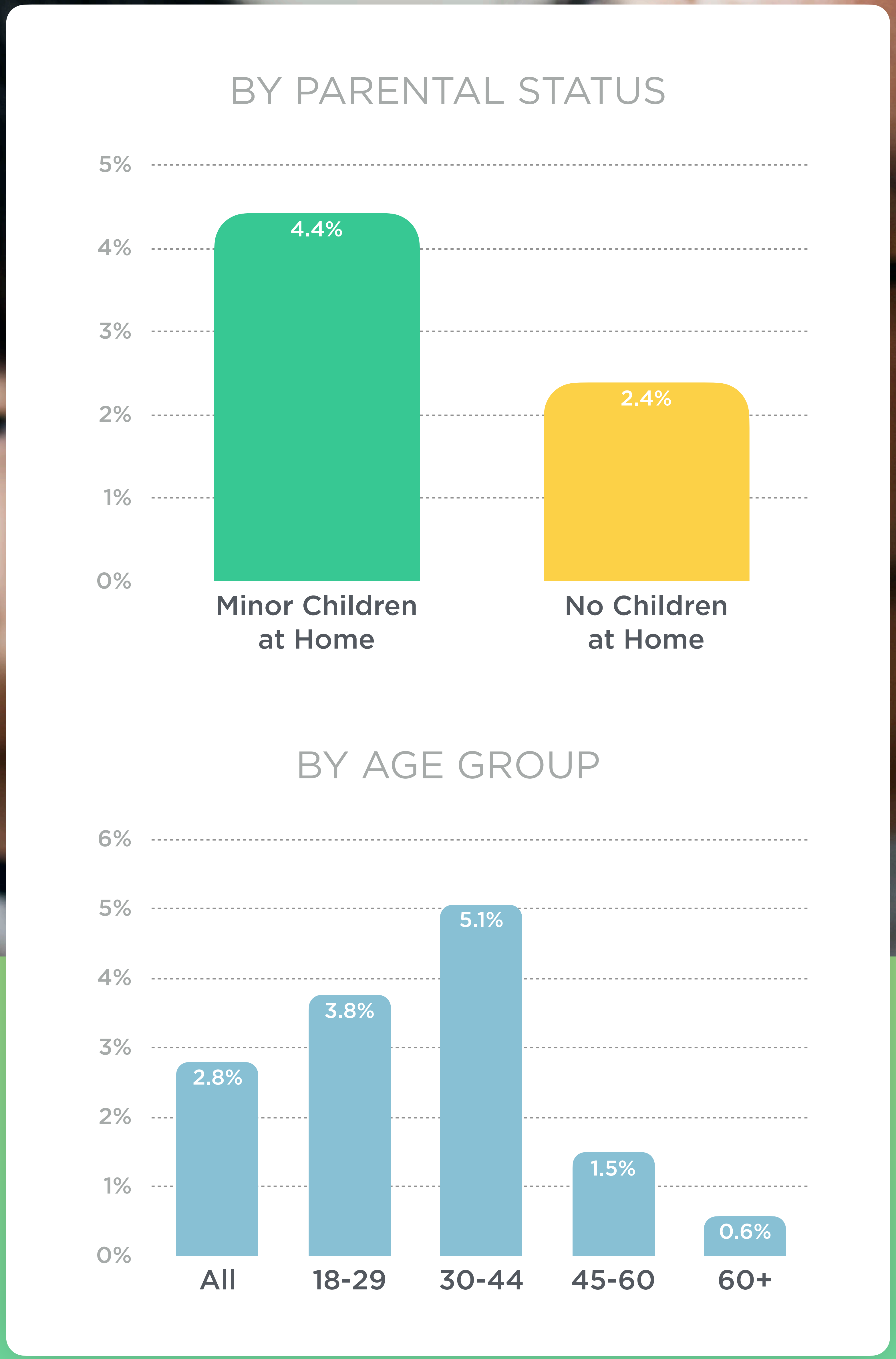
5%
APRIL 9

10%
JULY 17

+5%
CHANGE

PRINTER

Male	8.3%
Female	11.5%
Ages 18-29	12.8%

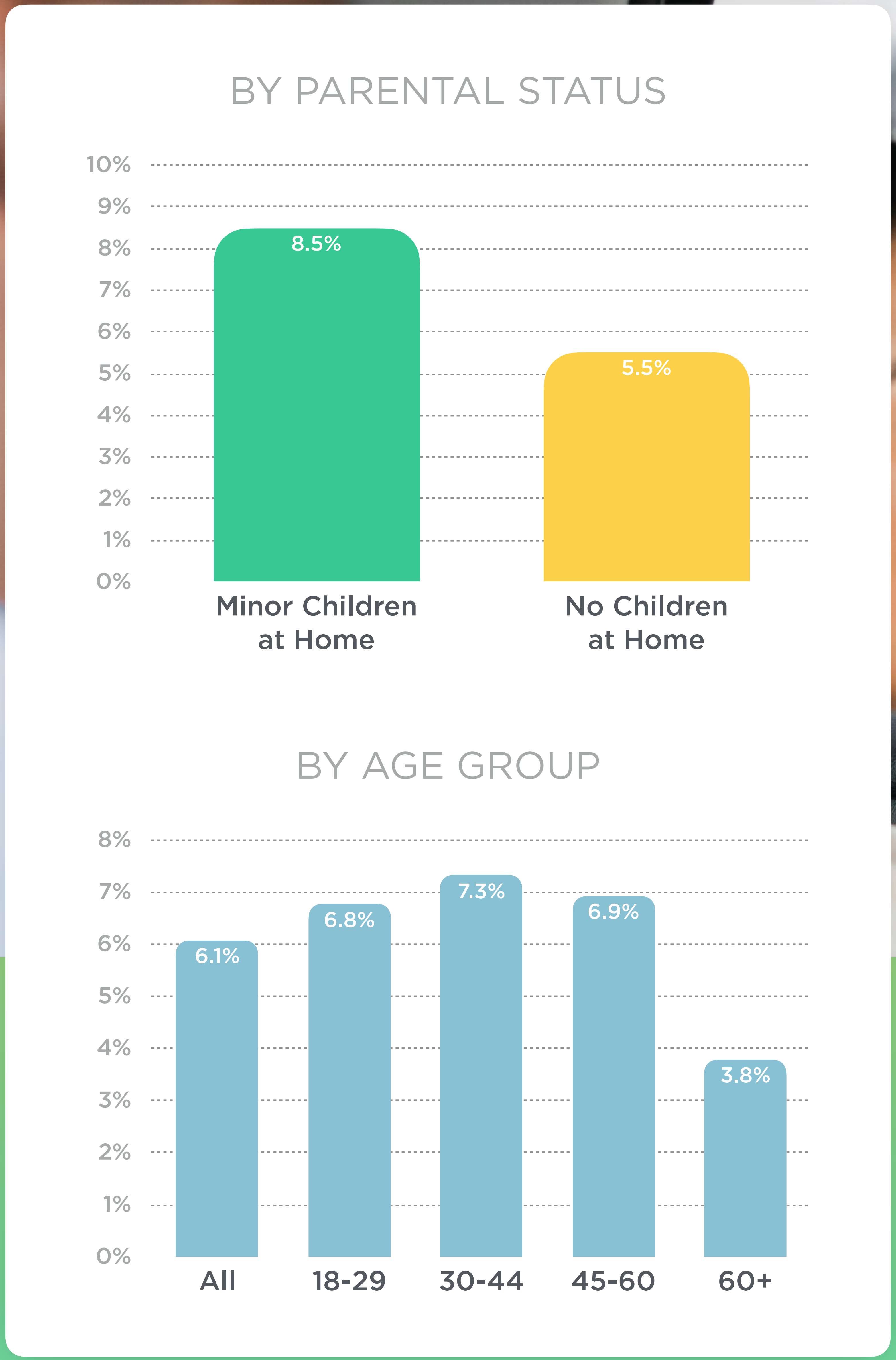


ONLY

3%

OF ALL RESPONDENTS

Say that they plan to **purchase a home** in the next 3 months.



ONLY

6%

OF ALL RESPONDENTS

Say that they plan to **purchase a car** in the next 3 months.

50%

OF PARENTS WITH MINOR CHILDREN AT HOME

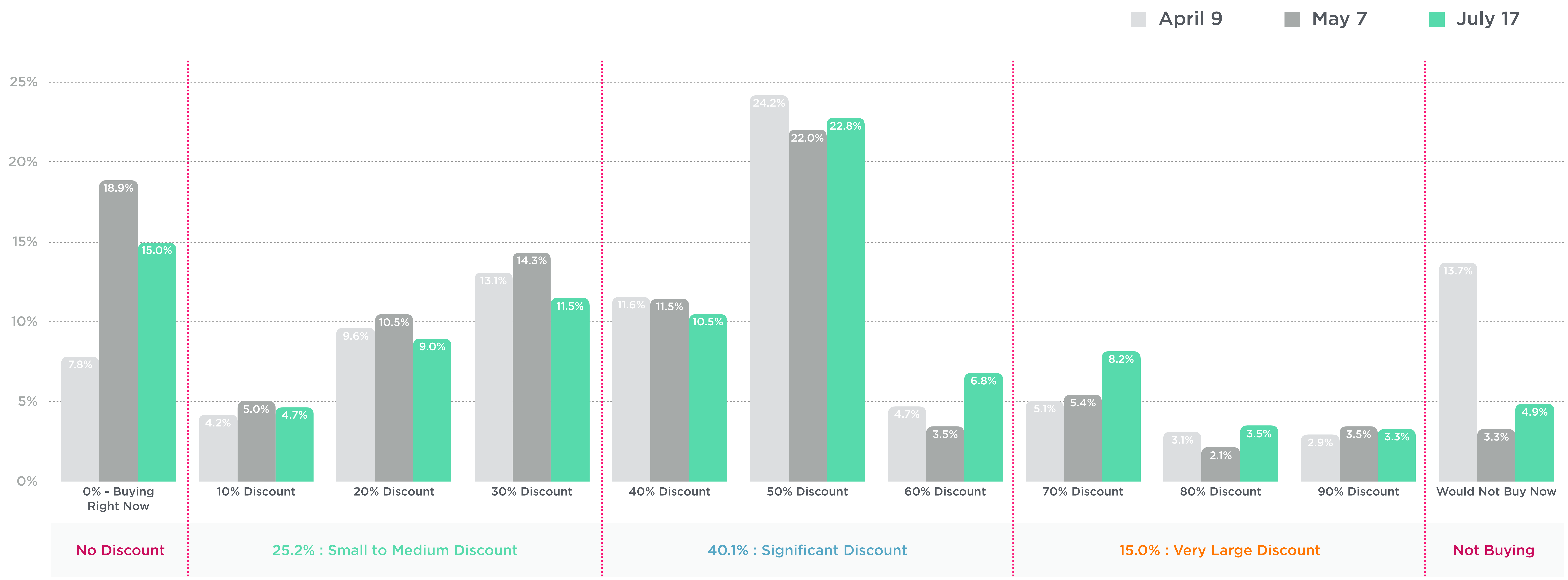
Say they have **permanently changed** their shopping habits to spend **more online**.

FILTER APPLIED

Parents with minor children at home.

Q: Do you think your online shopping habits have changed permanently?	PARENT RESPONSES BY AGE GROUP				
	All	18-29	30-44	45-60	60
Yes - I will shop **more online** in the future	**50.3%**	43.2%	**53.0%**	**51.4%**	31.6%
Yes - I will shop **less online** in the future	6.1%	10.8%	4.8%	5.7%	5.7%
No - I will go back to my **old habits** when I can	43.5%	**46.0%**	42.2%	42.9%	**63.2%**

Q: How **big of a discount** would you need to buy an item you really want but consider **non-essential** right now?



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