



COVID-19 U.S. CONSUMER IMPACT TRACKING STUDY – WEEK 10

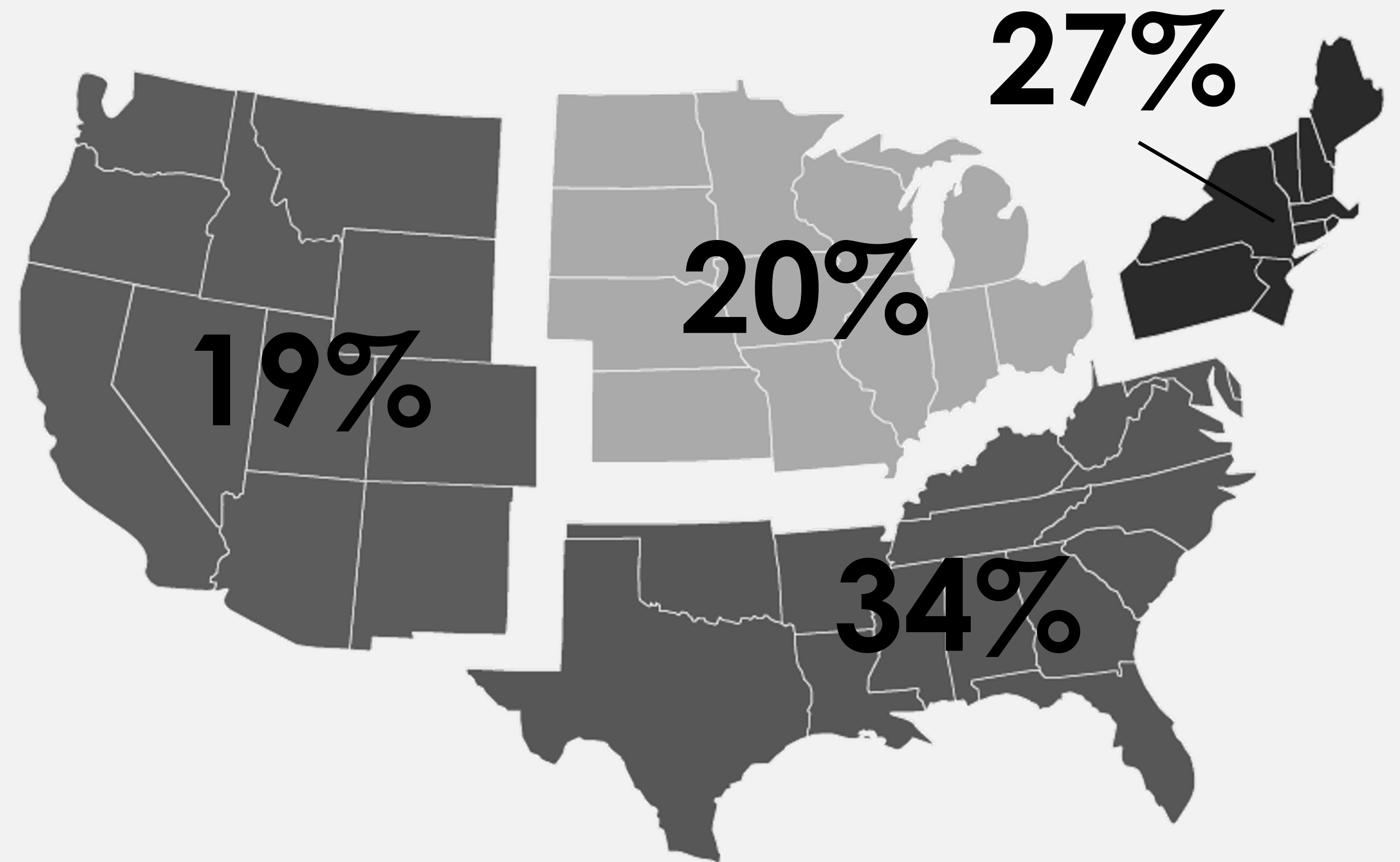
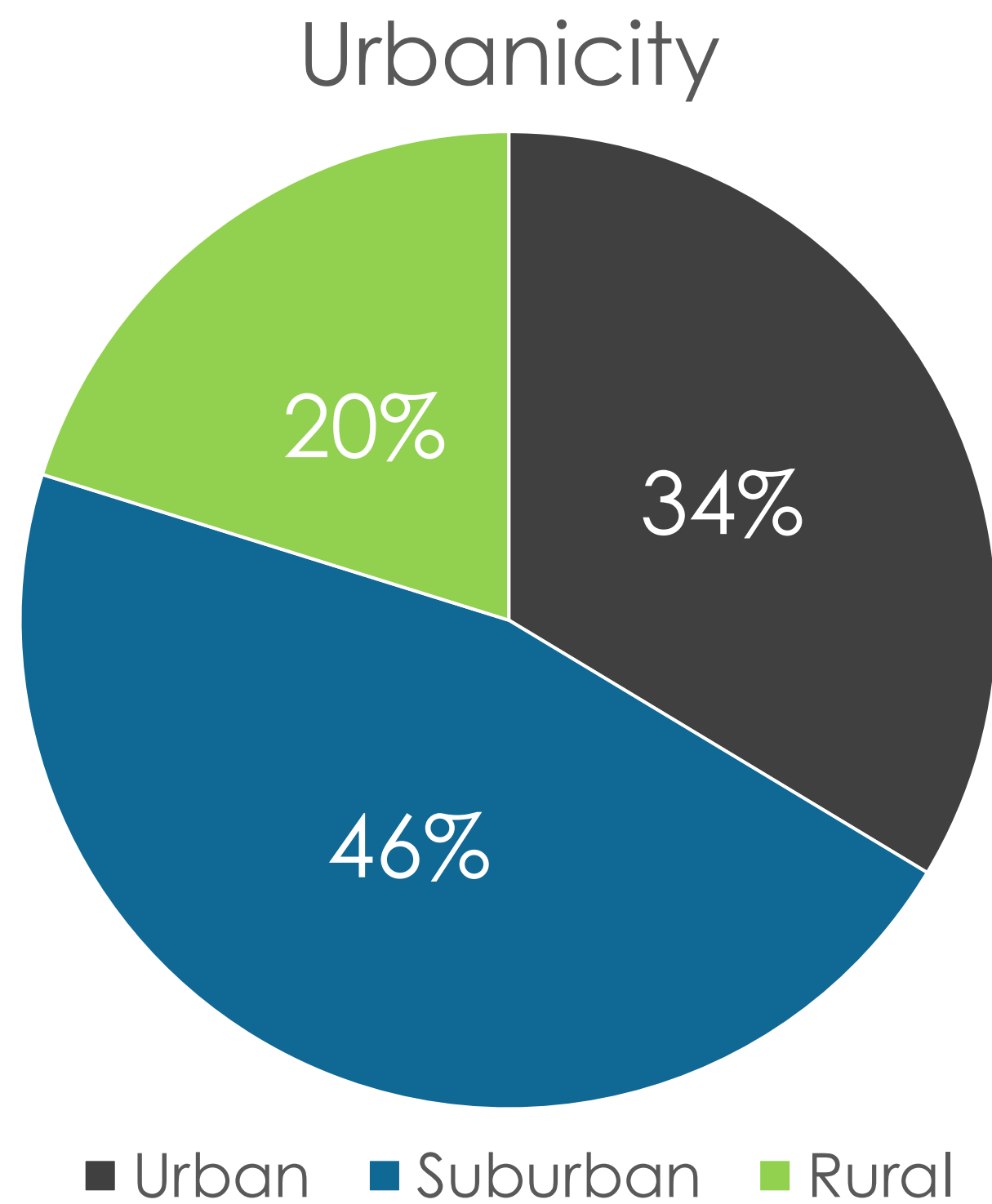
PRESENTED MAY 11, 2020

Methodology

- N = 1,100; Census Balanced
- MOE = $\pm 2.95\%$
- Panel: General Population
- Collected: 05/08/20, 05/09/20

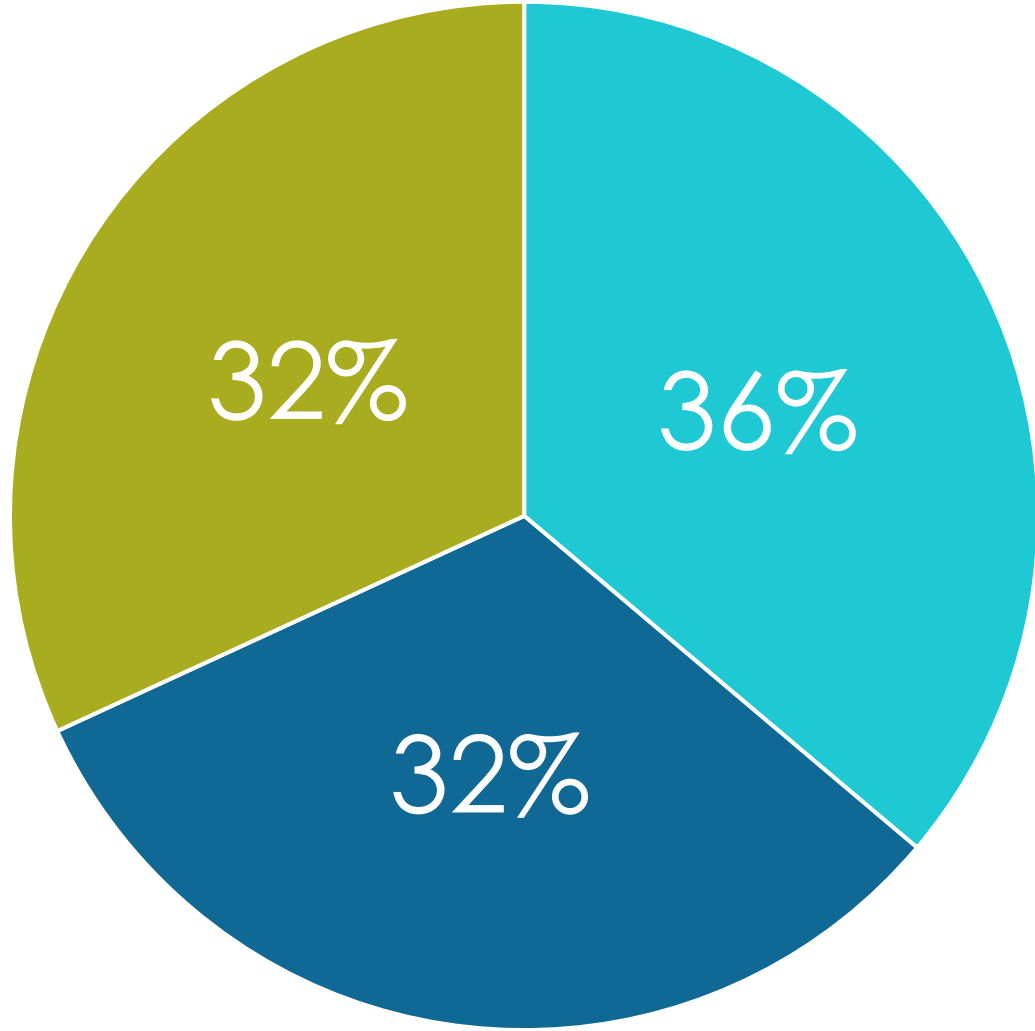


Census Balanced Panel is Representative of America



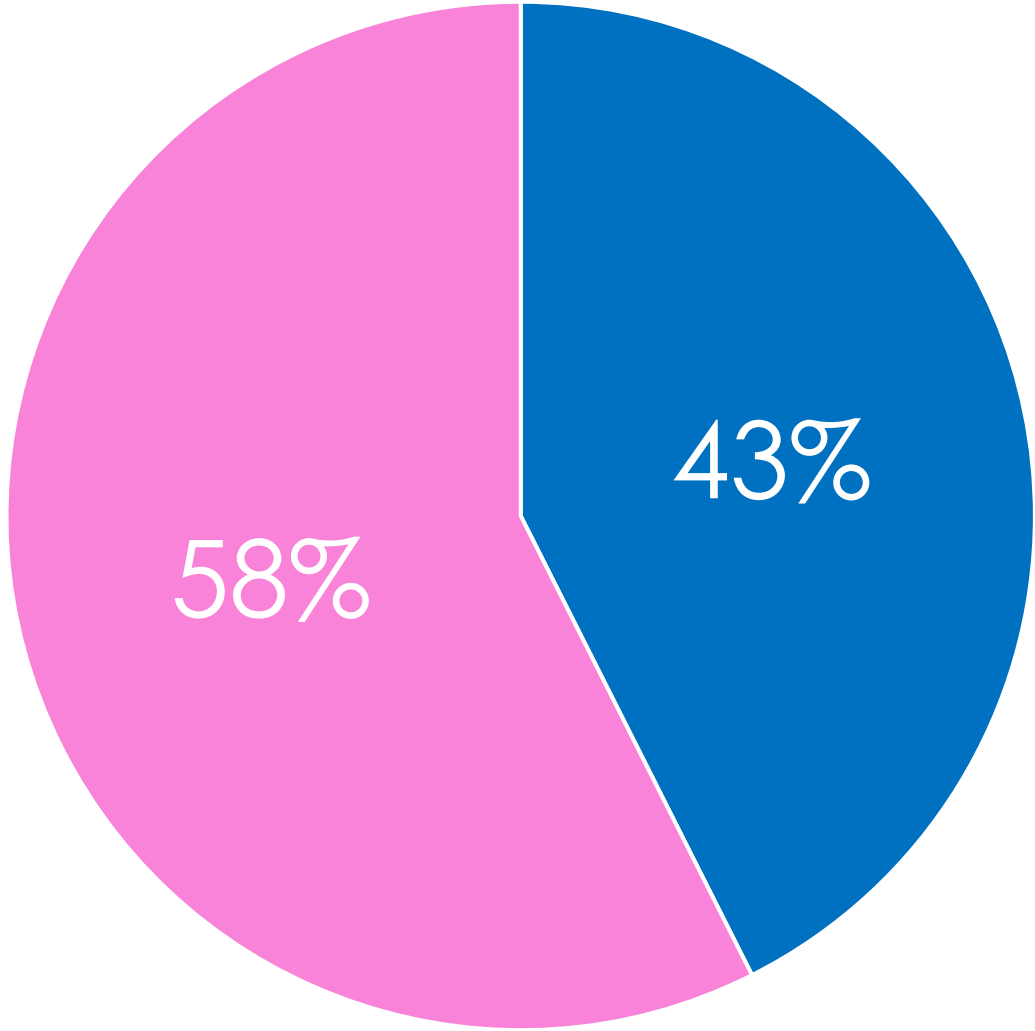


Generation



■ Millennial ■ Gen X ■ Boomer

Gender



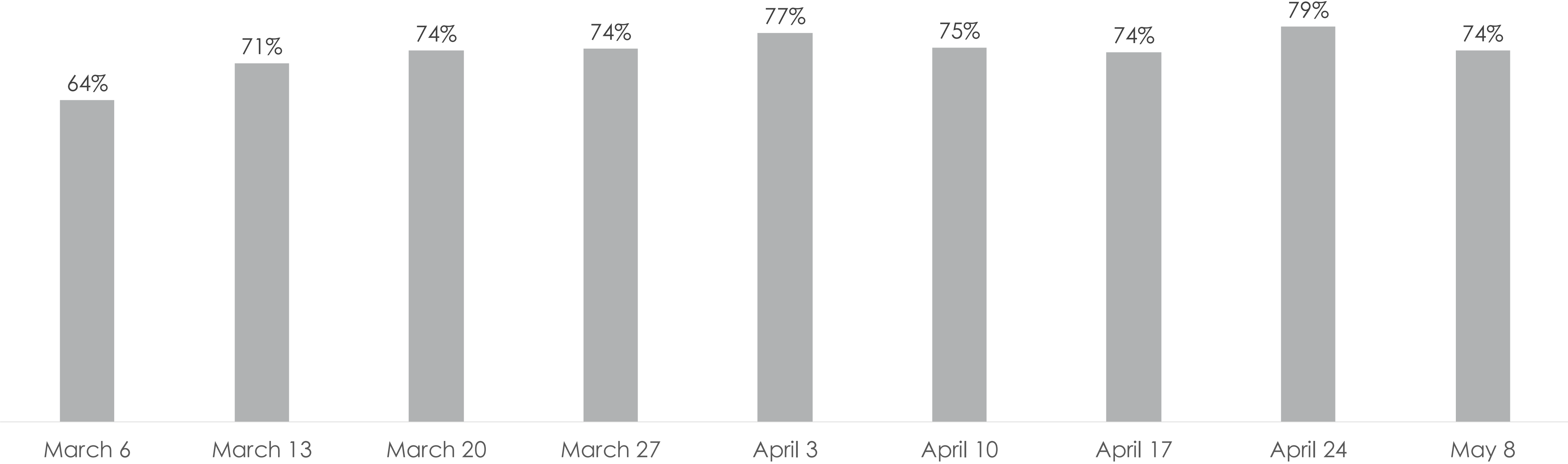
■ Male ■ Female



Confidence

Despite the continued spread of the virus, nearly three-quarters of respondents remain confident in the extra precautions they're taking to protect themselves.

Confident in extra precautions

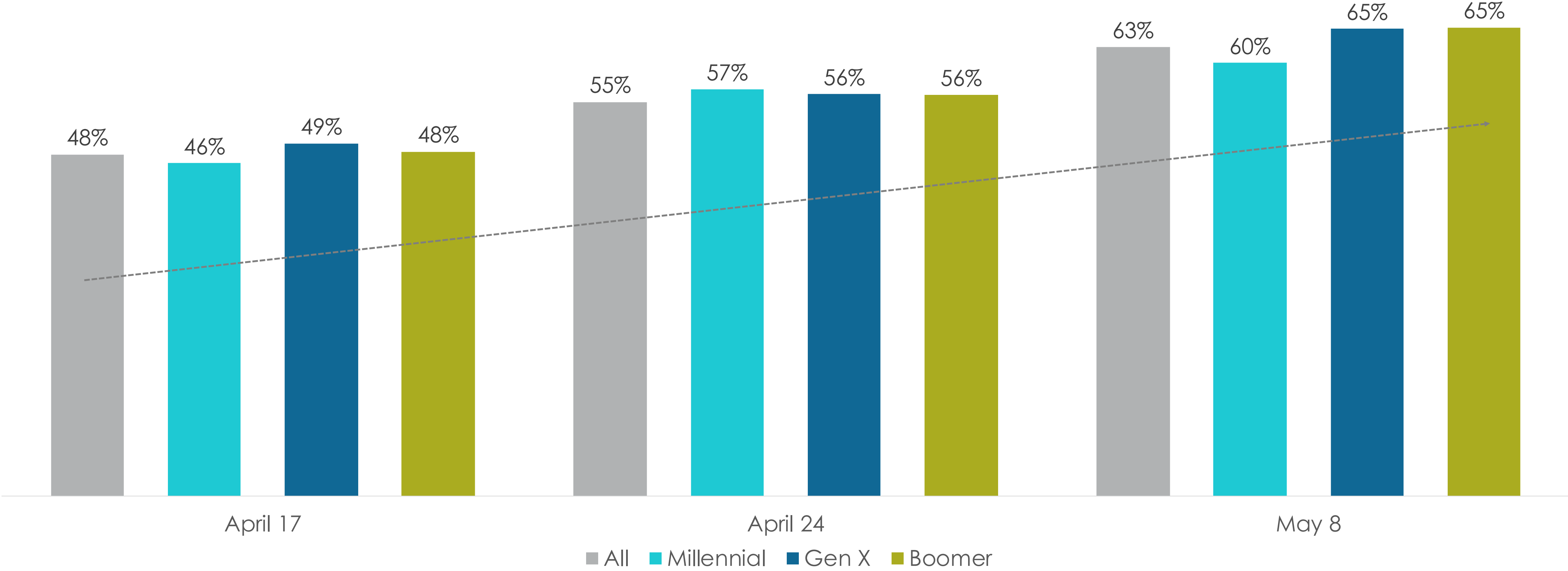


■ All

How confident are you that taking extra steps to protect yourself (avoiding crowds, washing your hands more frequently, etc.) will minimize the likelihood that you will get the Coronavirus?

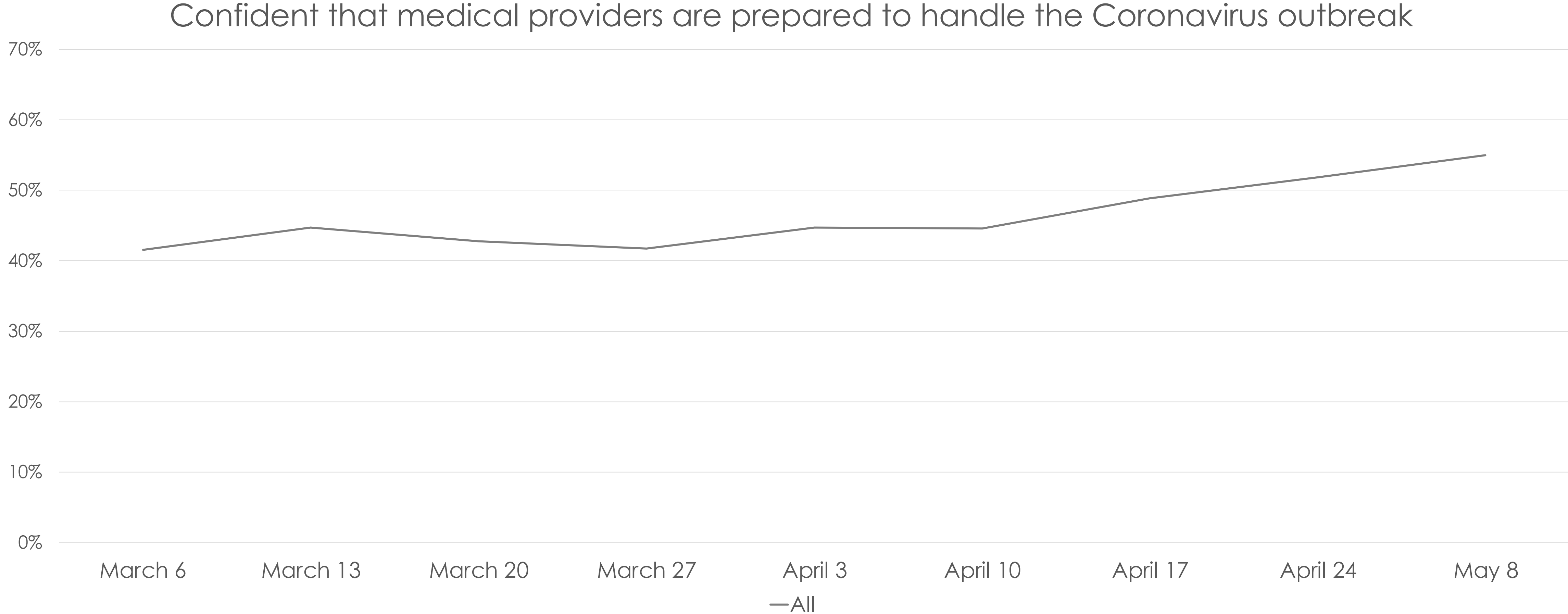
The sustained confidence may be the result of an increase in the precautions taken by many. Nearly two-thirds now always wear a mask in public, up from nearly 50% two weeks ago.

Always wears a mask in public



Do you wear a mask when you have to go out in public?

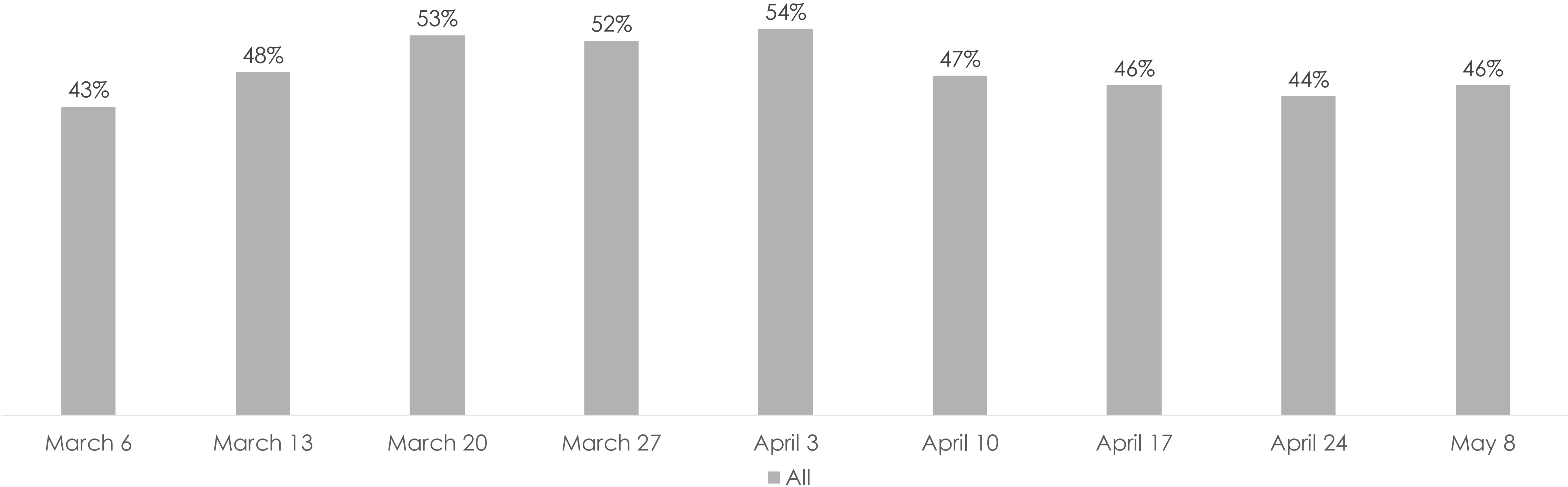
There has been a steady increase over the last 6 weeks in people's confidence that their local medical community is prepared to handle the outbreak.



How confident are you that the medical providers (hospitals, doctors, etc.) in your community are prepared to deal with a Coronavirus outbreak?

Confidence that the government is keeping us fully apprised of the situation remains below 50%.

Confident that the government is keeping us up to date

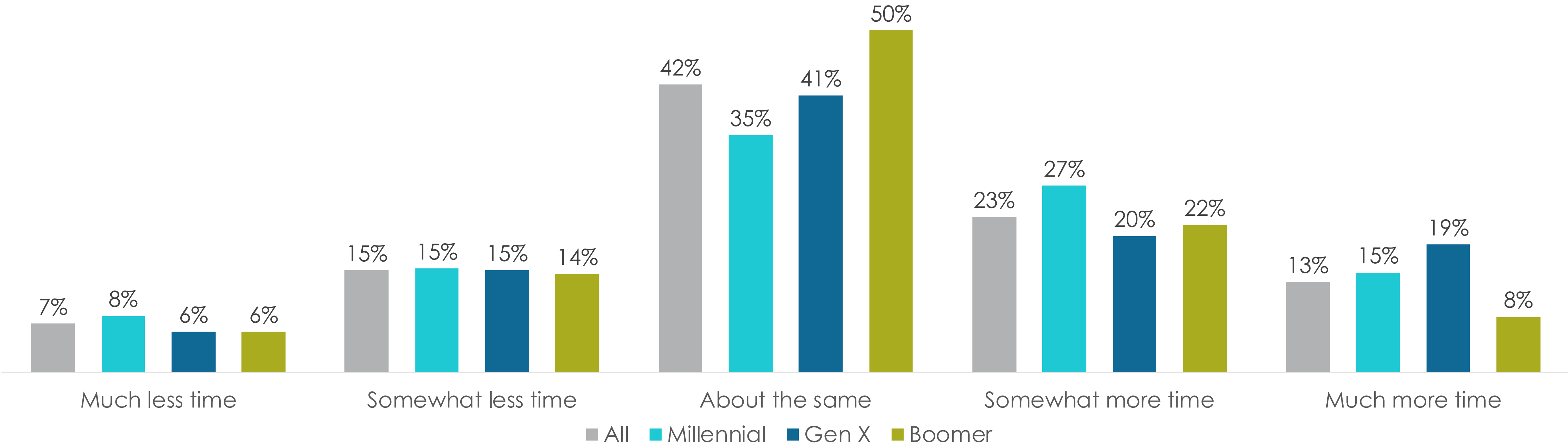


How confident are you that the government is keeping us up to date on the status of Coronavirus in the U.S.?

Information

More than one-third (36%) of respondents are spending more time keeping up with information than they did a month ago, while less than one-quarter are spending less time.

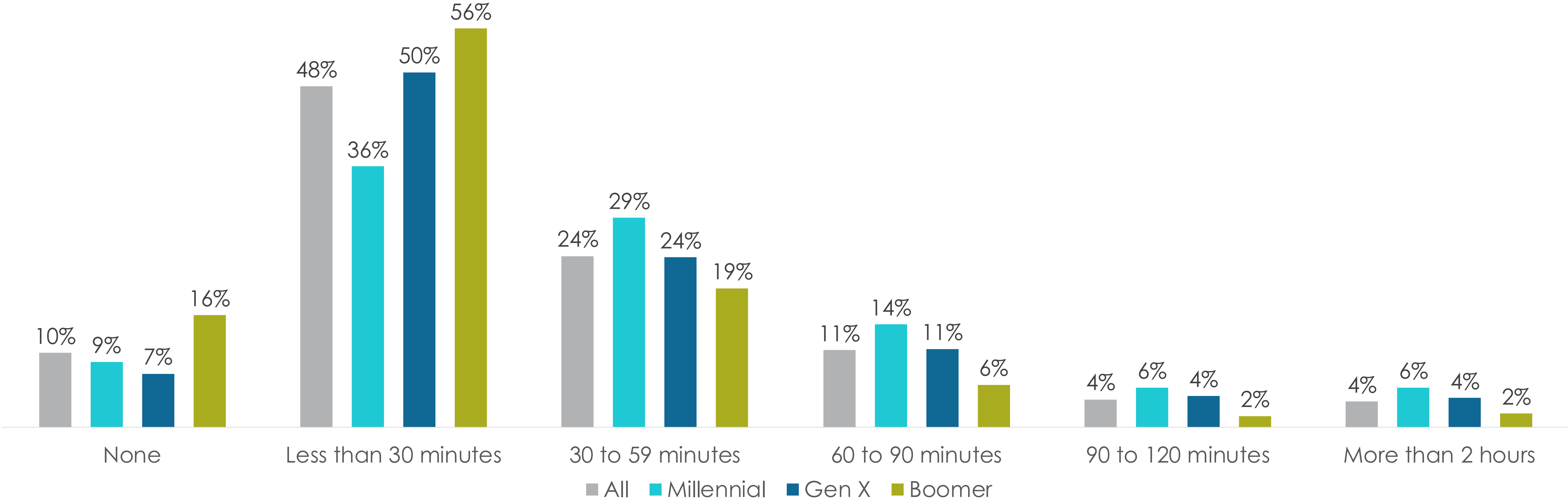
Time spent keeping up with information compared to a month ago



How much time are you spending keeping up with information now as compared to a month ago?

90% of people are spending some time everyday discussing the coronavirus, and nearly 1 in 5 people are spending an hour or more.

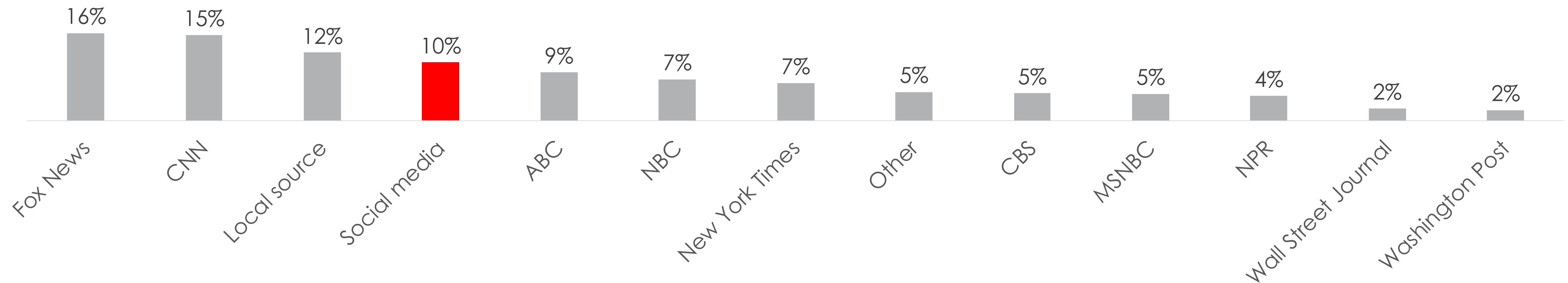
Time spent per day discussing Coronavirus



How much time do you spend in a typical day discussing (online or in person) Coronavirus with friends or family members?

Given options of a single source for all their coronavirus information, 16% chose Fox News followed closely by CNN with 15%. The only two other sources gleaming double digit preference were local news outlets (12%) and social media (10%).

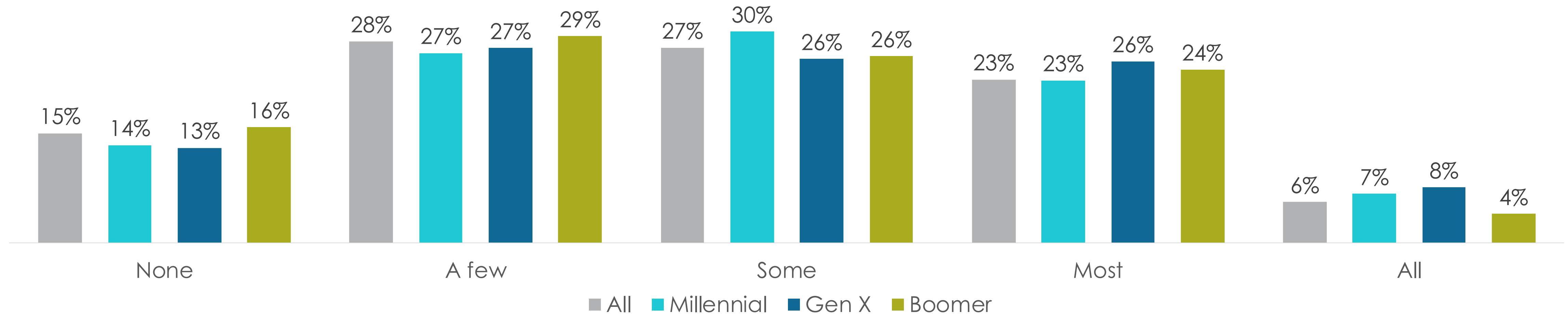
Preferred choice for news sources



If you had to select one of the following as your only source of information about Coronavirus which would you choose?
Select one.

85% of respondents have watched one or more of the daily White House briefings, but less than one-third say they have watched all or most.

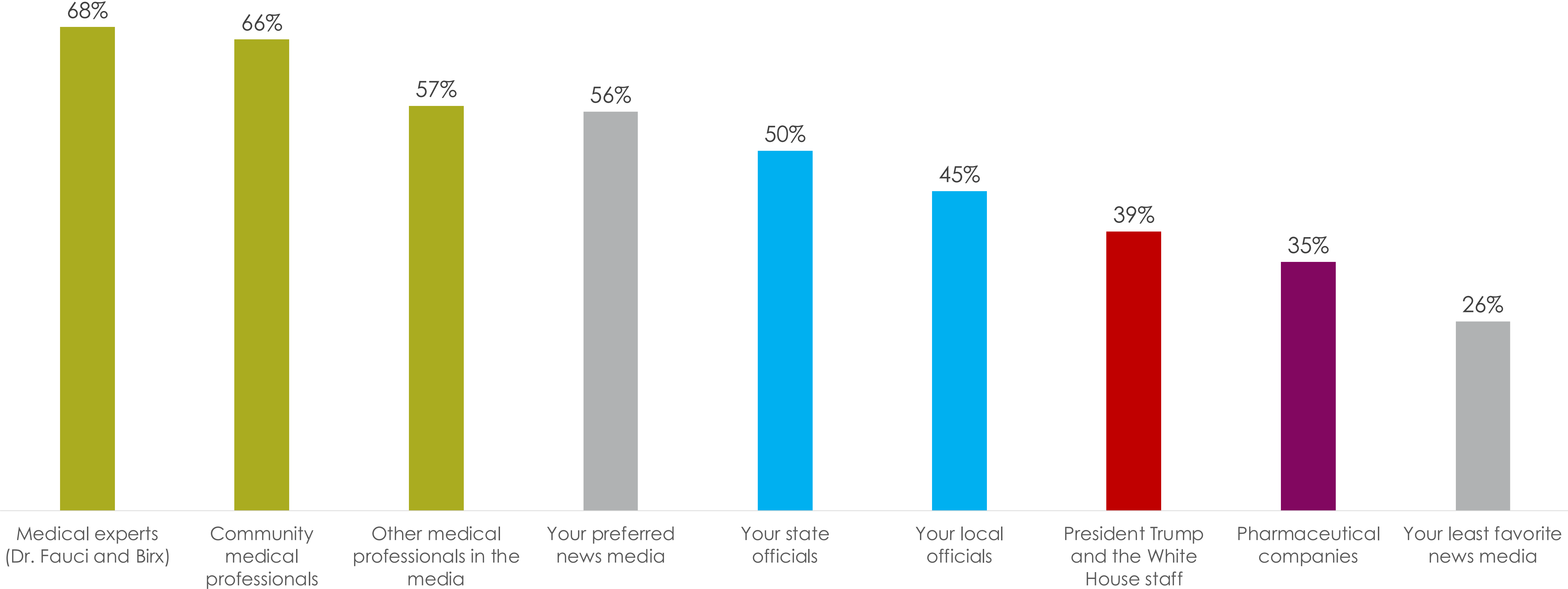
White House daily Coronavirus updates watched



How many of the White House daily Coronavirus updates have you watched?

Trust in all information sources is relatively low. Medical professionals lead the way followed by preferred media source, then the various government entities.

Trust information sources

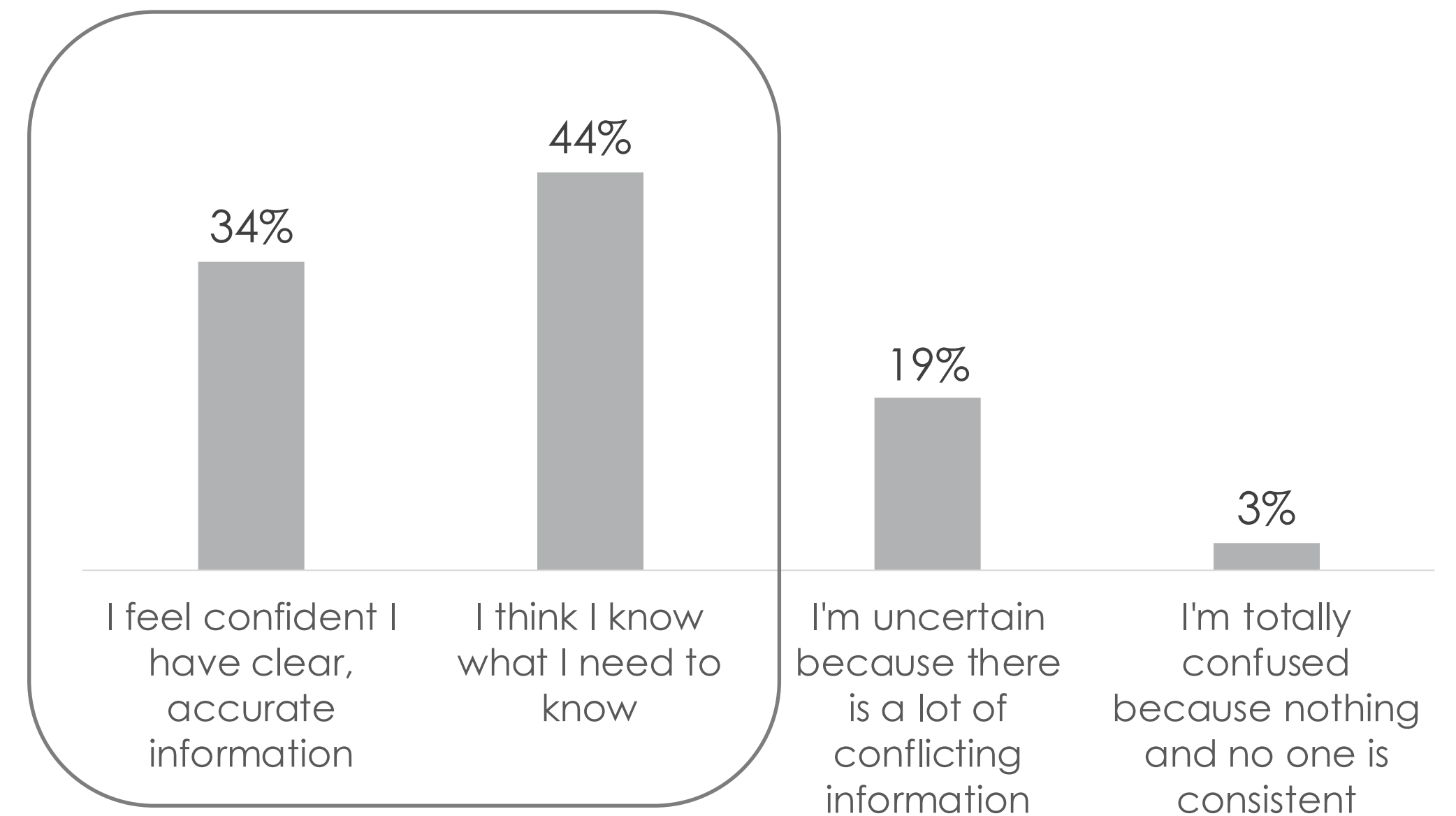


How much do you trust the following as sources of information about Coronavirus?



Despite the limited confidence in their information sources, 78% of people at least think they know all they need to know.

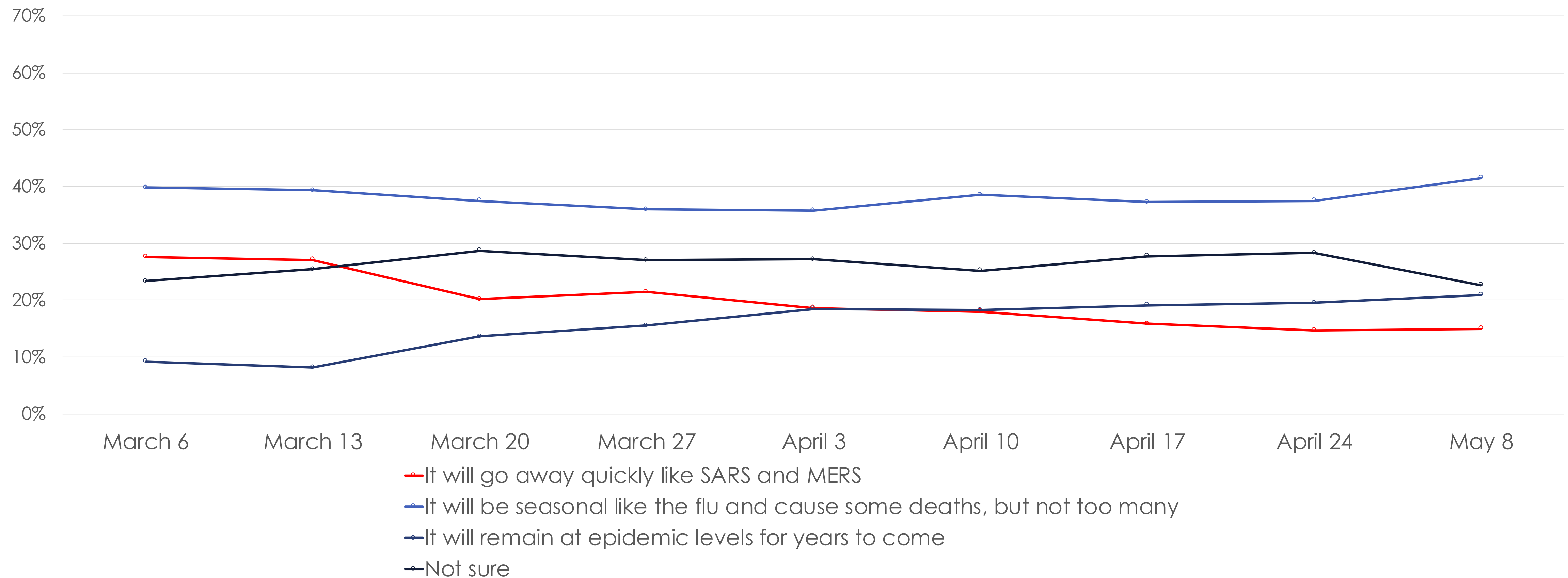
Feeling about personal knowledge of Coronavirus



Which of the following best describes how you feel about your knowledge of Coronavirus?

Information over time has changed expectations of the disease since March 6th as more than twice as many believe it will remain an epidemic for years to come and nearly half as many feel it will just go away.

Expected long-term presence of Coronavirus



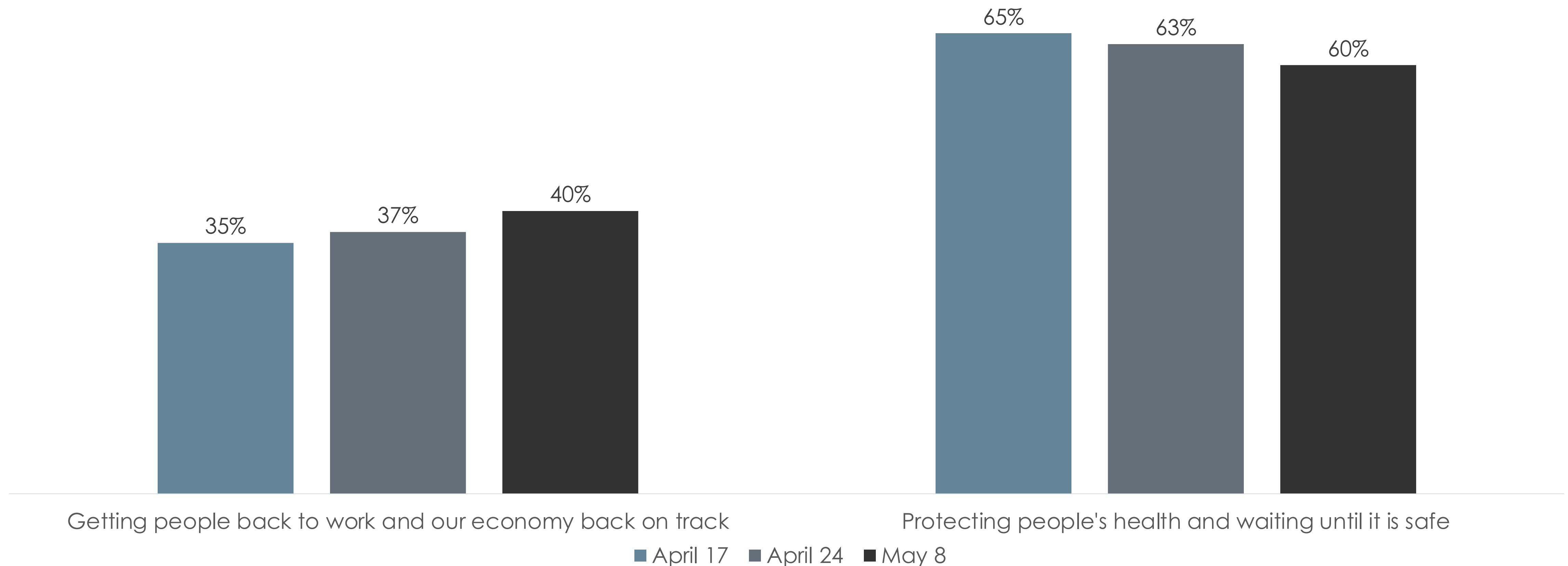
Which of the following best describes your expectation for the long-term presence of the Coronavirus?



Re-opening

While there has been a shift in the last 3 weeks, respondents still believe health should be weighed more heavily than the economy regarding the decision to open the country back up.

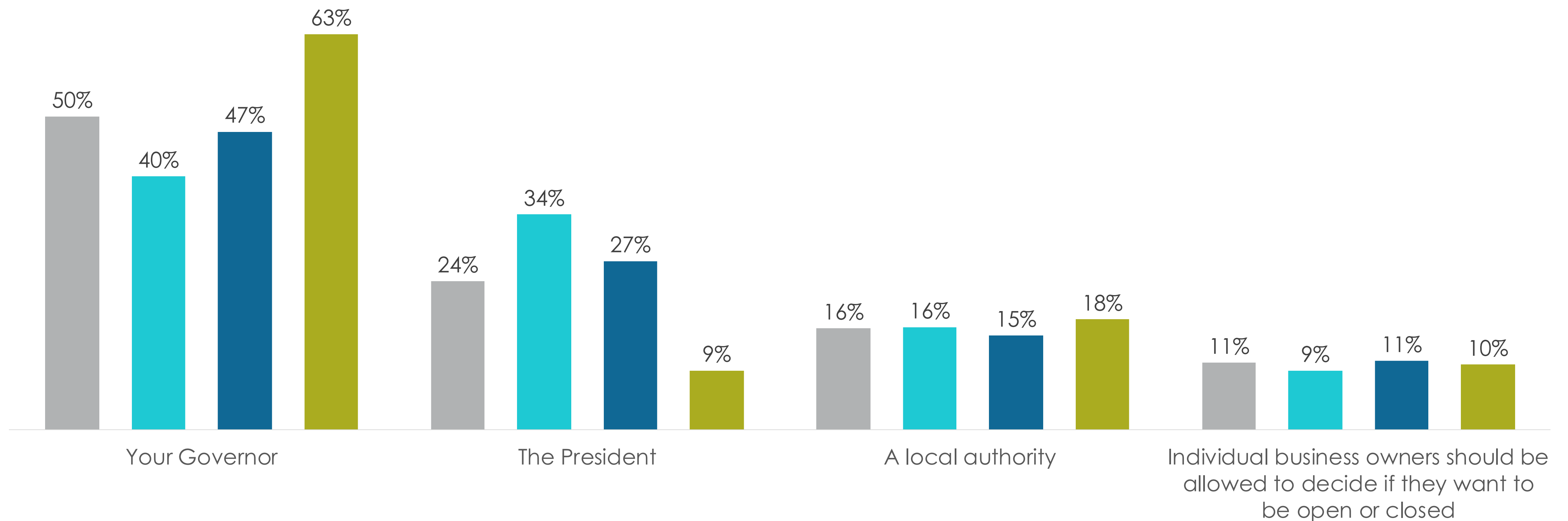
Influence for opening the country back up



Allocate 100 points between the two options based on how influential you think they should be in the decision to open the country back up.

There is a generational bias in the opinion of who should have primary authority in the decision to open a state back up. 63% of Boomers feel it is the Governor while only 40% of Millennials share that opinion.

Who should have the primary authority to open/close restrictions

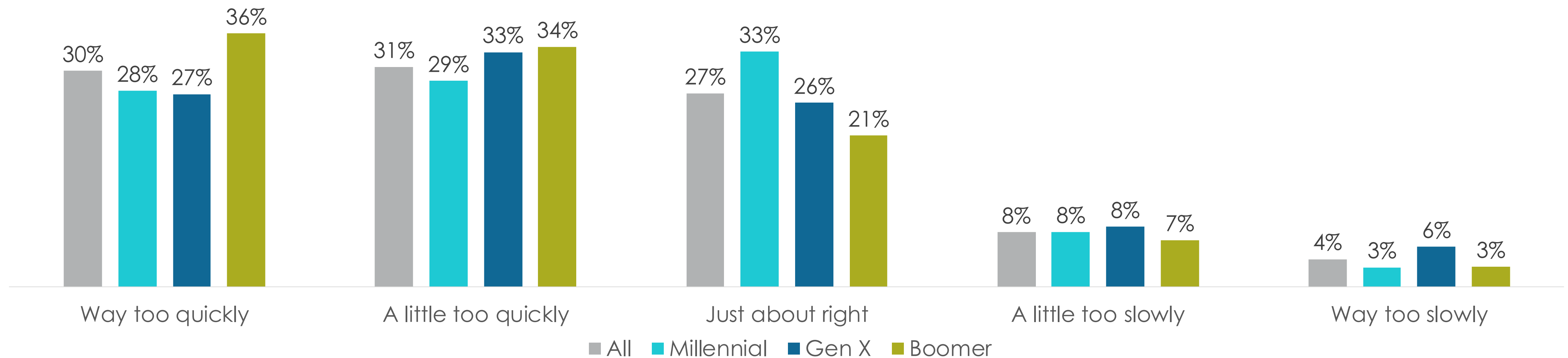


■ All ■ Millennial ■ Gen X ■ Boomer

Many states that have had shelter-in-place orders and other restrictions are beginning to open back up. Who do you think should have the primary authority to make the decision on when things are open or closed?

61% of respondents feel the states that are opening-up are doing so too quickly while 12% feel they are moving too slowly.

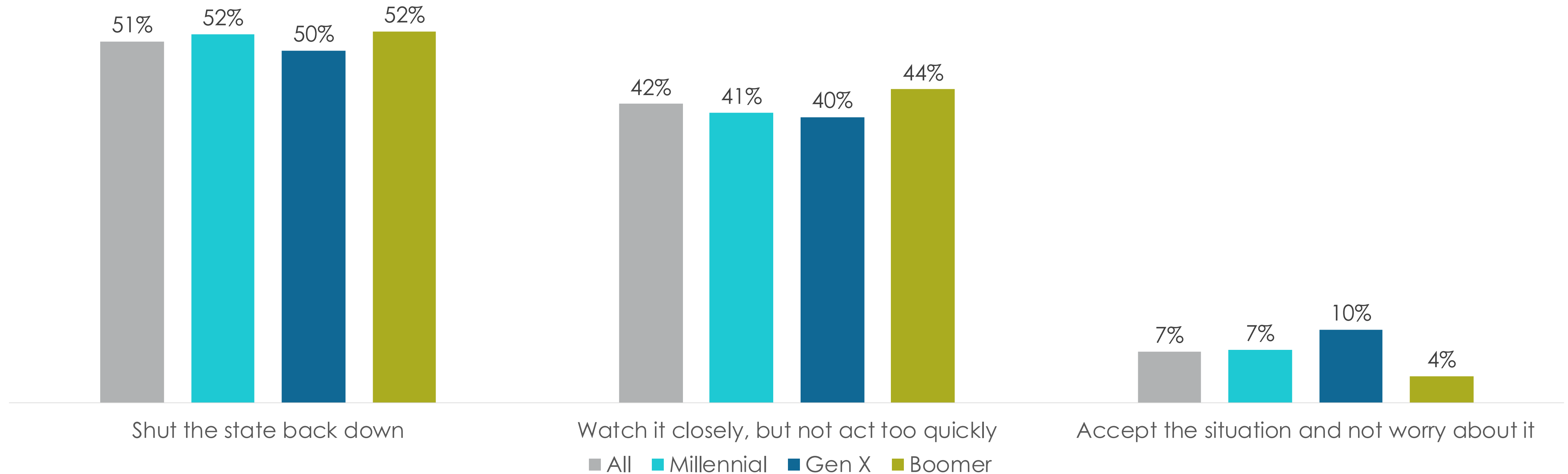
States that have opened moving too quickly/slowly



Do you think the states that have opened or are opening soon are moving too quickly or too slowly?

The majority (51%) think that a state that has reopened should shut back down if it experiences a noticeable increase in the number of COVID-19 cases.

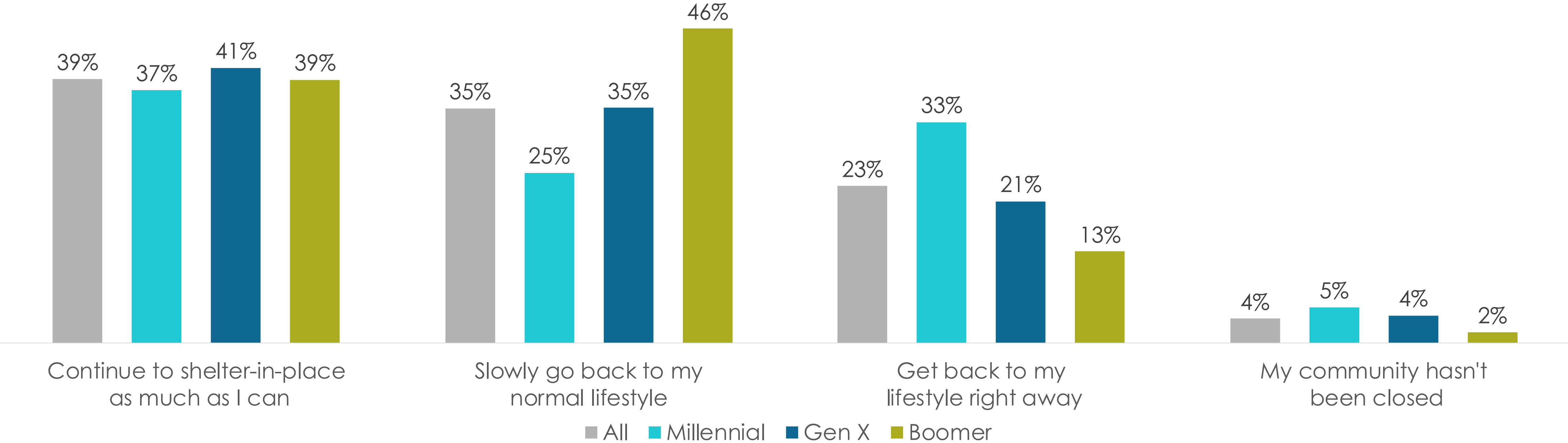
Response to open states with increased number of new cases



If the states that are opening up see a noticeable increase in the number of new COVID-19 cases what do you think they should do?

The conservatism demonstrated in prior responses is reflected in the fact that less than one-quarter of respondents will immediately return to their pre-COVID-19 lifestyle as soon as their community opens.

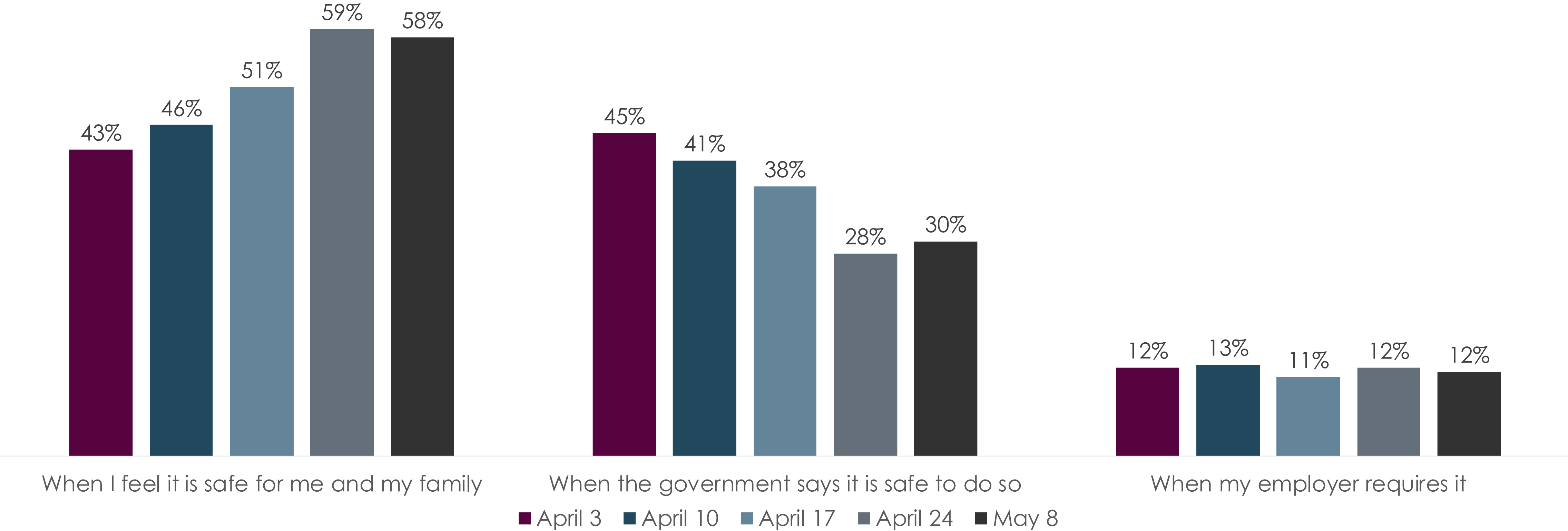
Personal action once state opens back up



Which of the following best represents what you'll do when your community opens back up?

And, that mindset and desire to control one's own destiny has seen a 15-point lift in the past 5 weeks.

Returning to normal behavior



Which of the following best describes when you'll return to your normal behaviors?

Summary

Confidence levels remain steady.

- A significant majority (74%) feel the precautions they're taking will protect them.
- It appears those precautions are growing. There has been a 31% increase in regular mask use over the past 3 weeks.
- Confidence in the local community's ability to deal with the crisis has grown slowly but steadily over the last 6 weeks.
- However, less than half (46%) of the respondents are confident the government is keeping us fully informed.

People want to be informed.

- More time is being invested in collecting information on COVID-19 than was being spent 4 weeks ago.
- No one source of information stands out as being preferred. Fox News (16%) and CNN (15%) lead the pack.
- The daily White House briefings drew a lot of viewers, but less than one-third of respondents have watched most or all of the broadcasts.
- Information source trust is surprisingly low. The medical community is the most trusted, followed by a preferred media outlet, with all government sources falling at 50% or lower.
- Despite the lack of trust in information sources, 78% of respondents feel they have all the information they need.

Summary – continued

People will be cautious when it comes to opening back up.

- Respondents still put more weight on health than the economy, but the gap has fallen from 30% to 20% in the past 3 weeks.
- More than twice as many people feel the primary authority to open their community should lie with the Governor (50%) rather than the President (24%).
- The majority (51%) want the state's that are opening to err on the side of caution and shut down immediately if there is a noticeable increase in COVID-19 cases.
- And that attitude is reflected in respondents' approach to reopening. Nearly three-quarters will either continue to shelter in place or ease back into the normal lifestyle once their community reopens.