



COVID-19 U.S. CONSUMER IMPACT TRACKING STUDY – WEEK 11

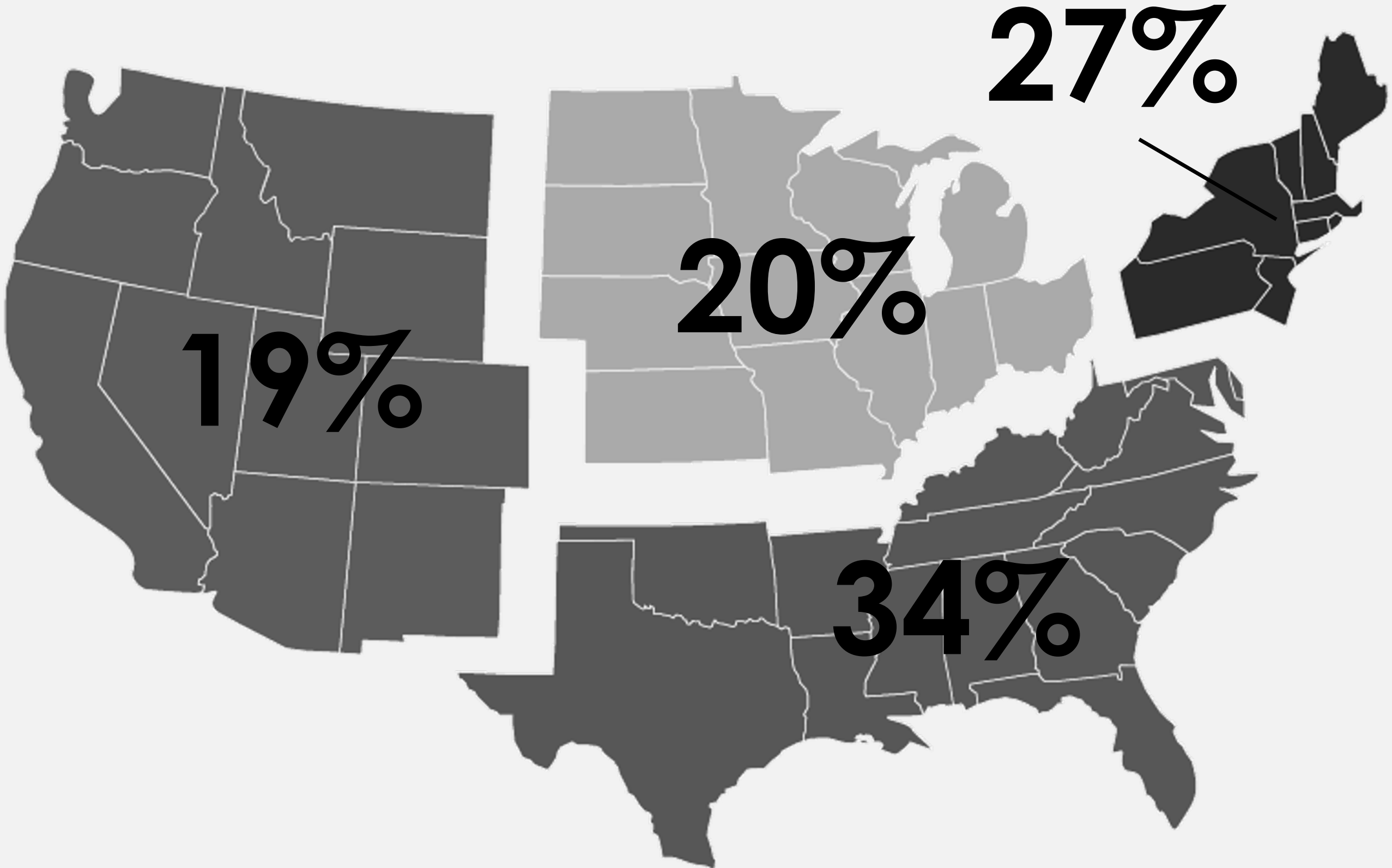
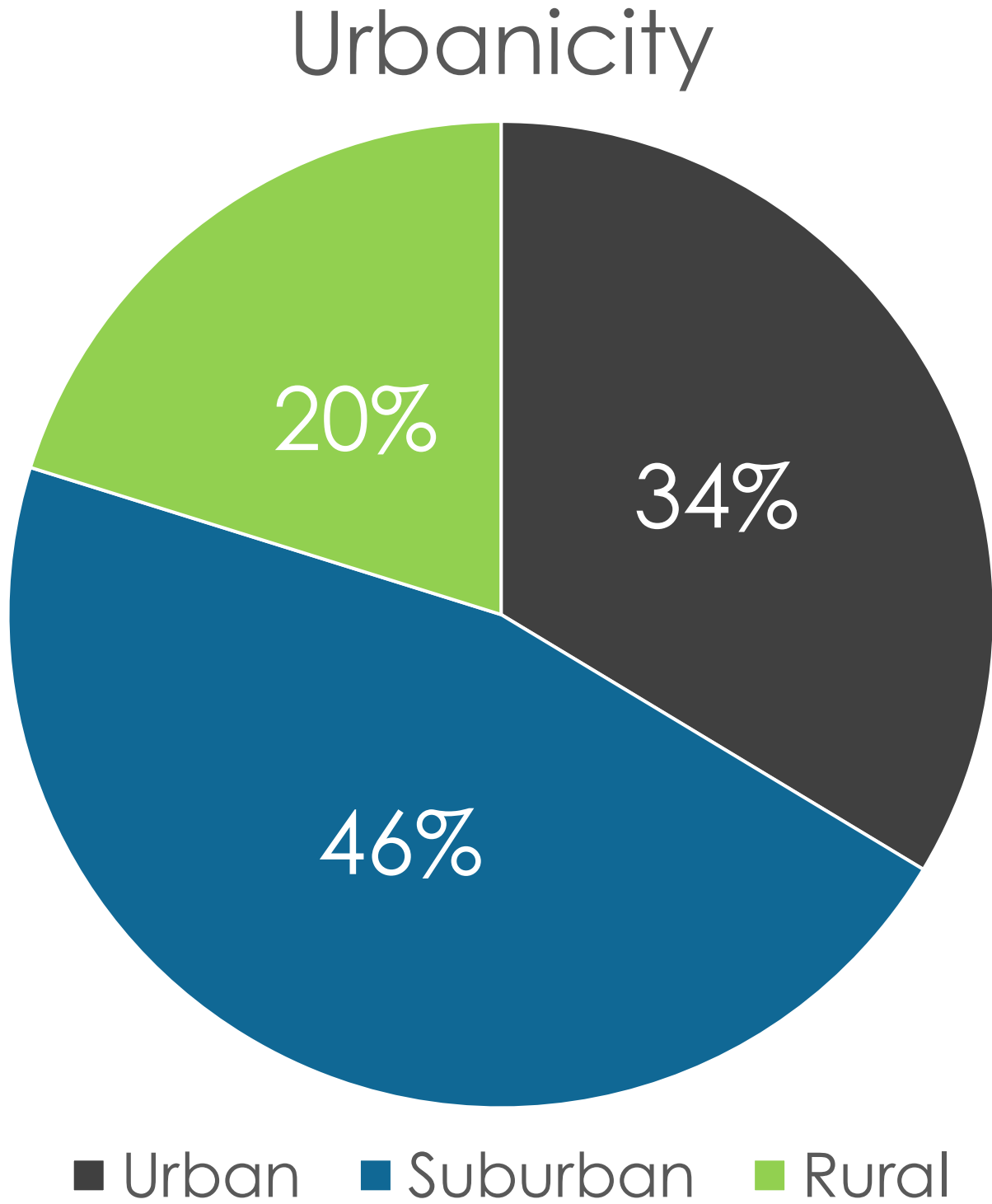
PRESENTED MAY 18, 2020

Methodology

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

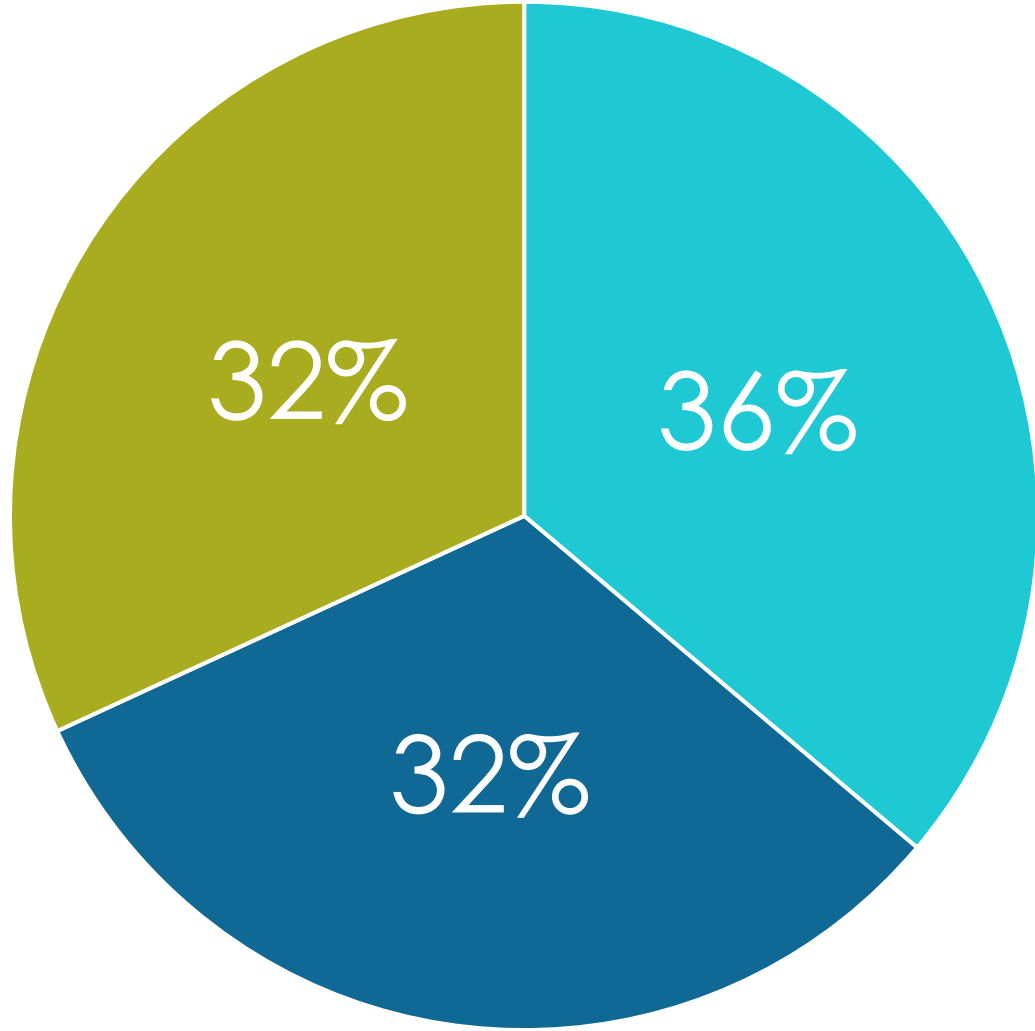


Census balanced panel is representative of America



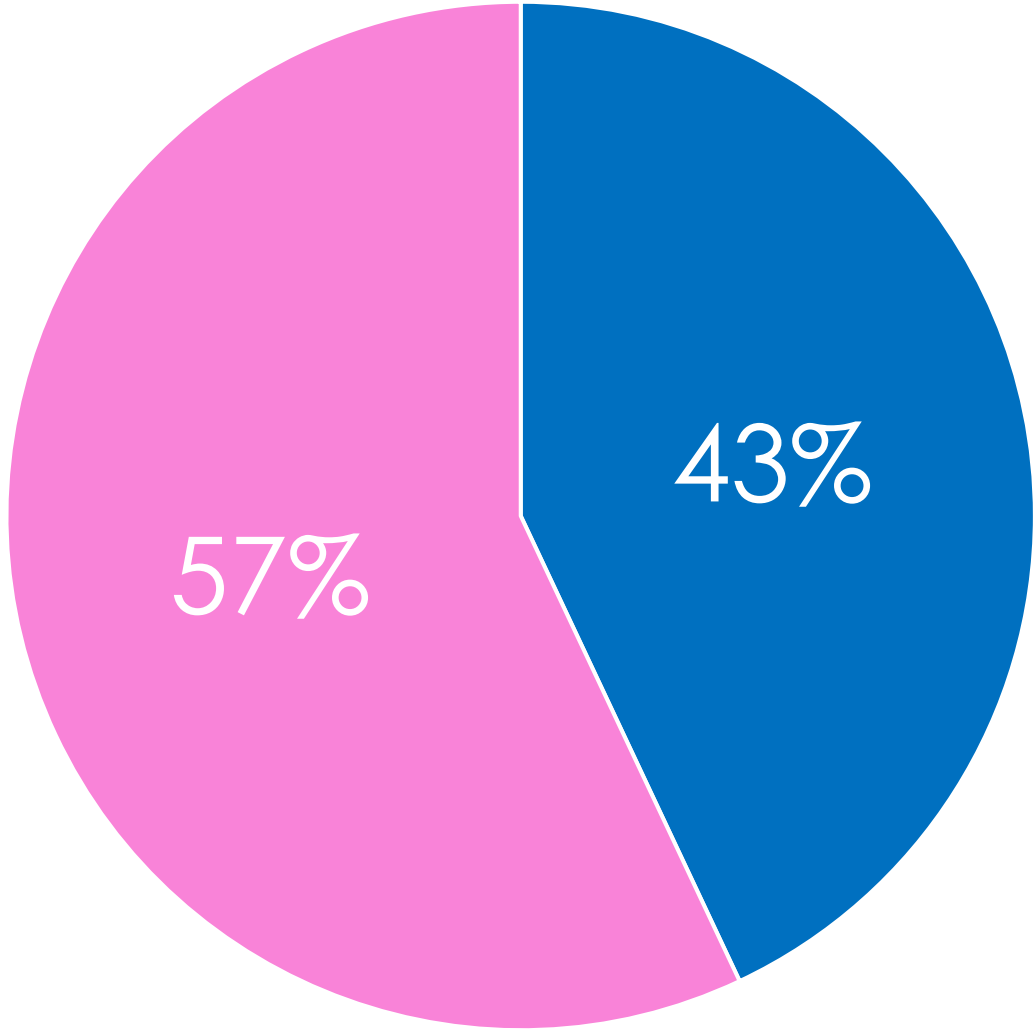


Generation



■ Millennial ■ Gen X ■ Boomer

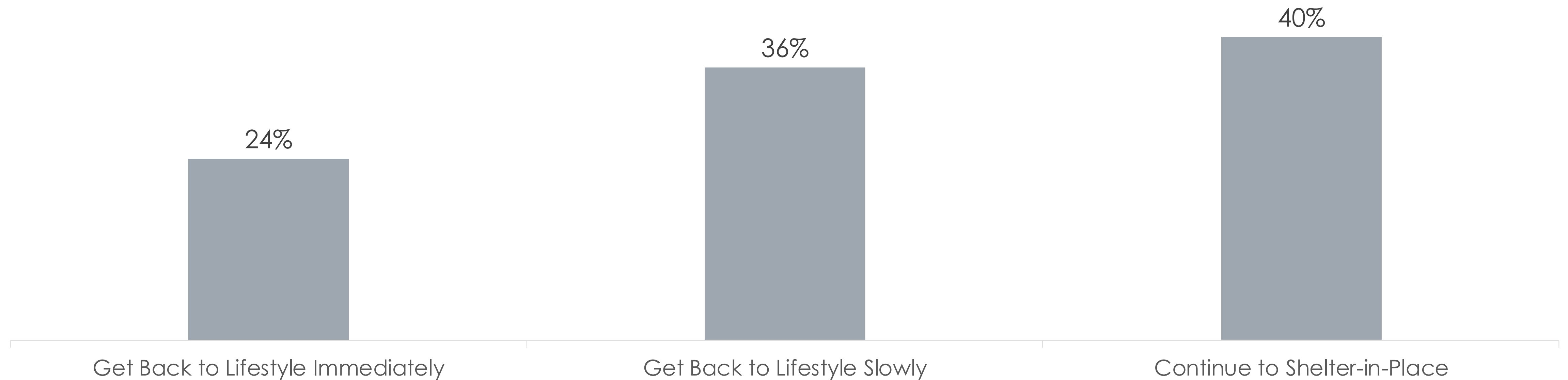
Gender



■ Male ■ Female

Once their communities open up, 24% of survey respondents say they will immediately go back to their normal lifestyle versus 40% who will continue to shelter-in-place.

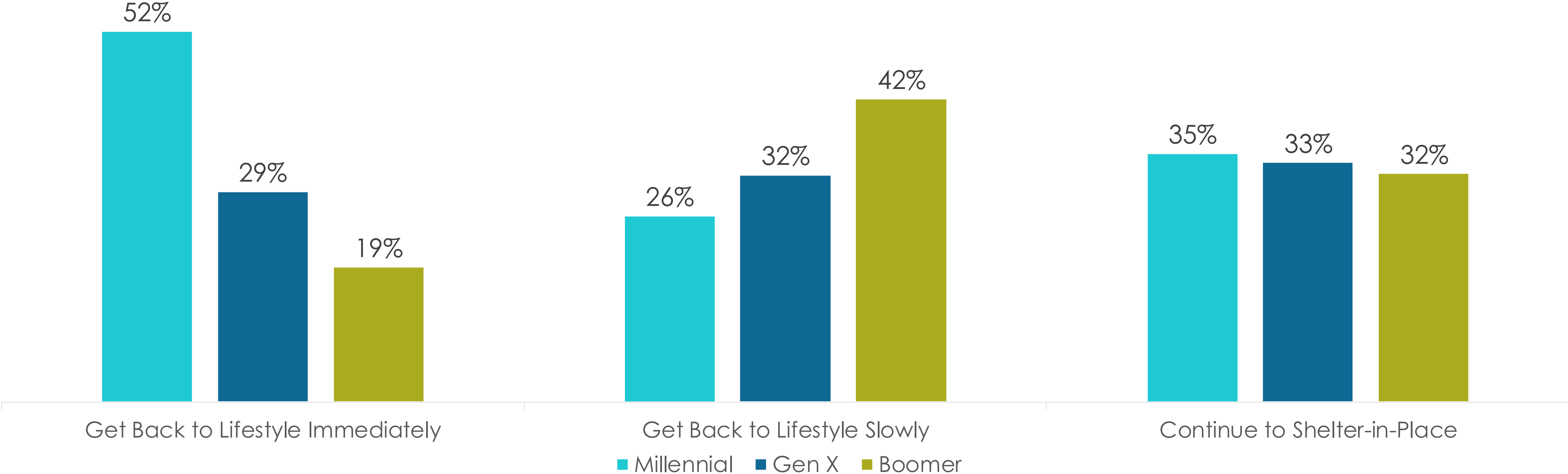
Approach to community opening up



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

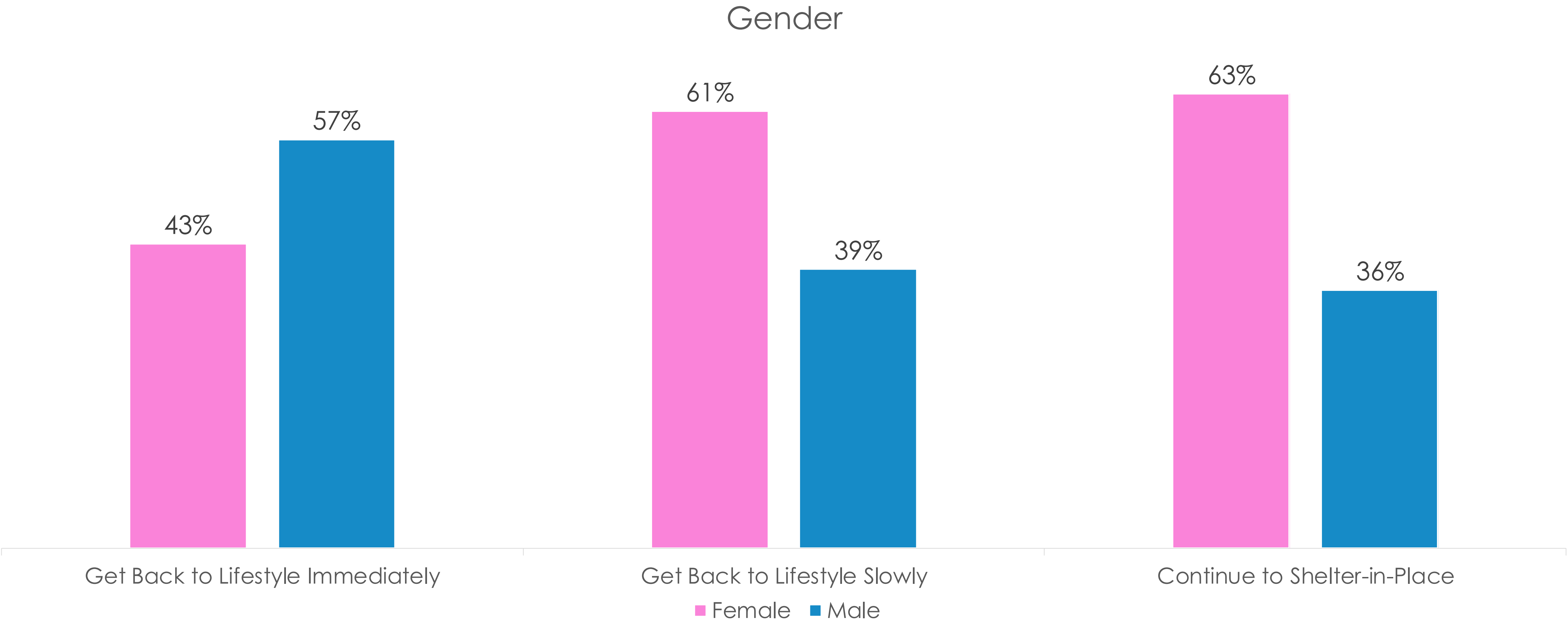
Not surprisingly, lower-risk Millennials are most likely to immediately return to their lifestyle; however, more than one-third also say they will continue to shelter-in-place.

Generation



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

Men represent 57% of those who will act immediately, while women are much more likely to take a more cautious approach when communities open up.



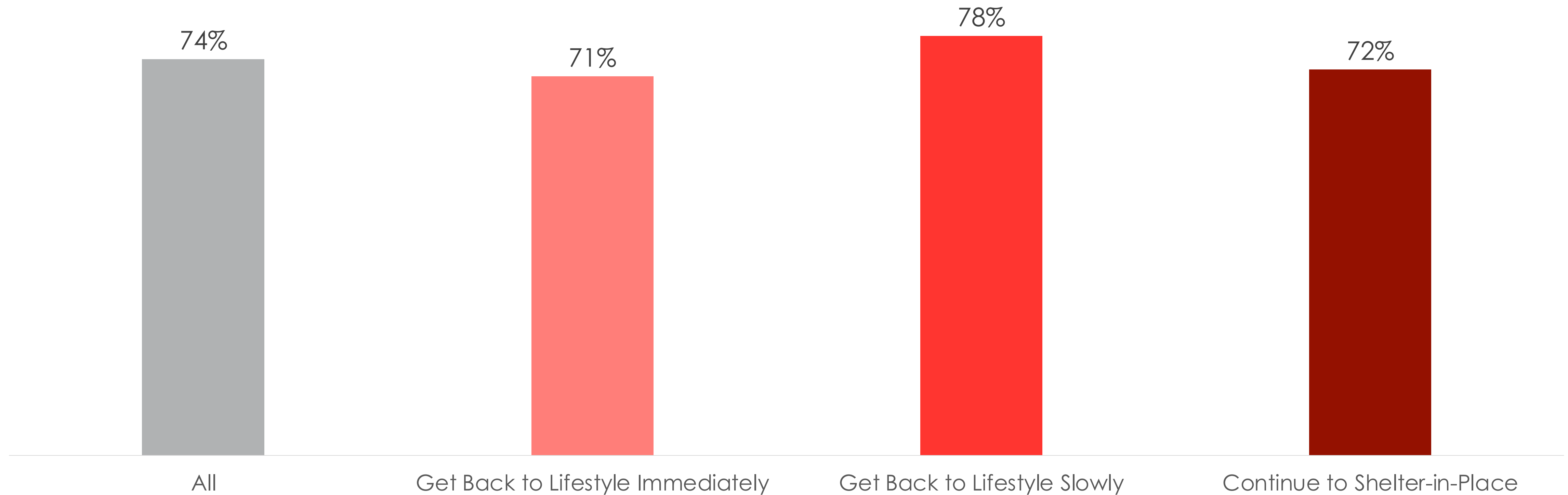
Which of the following best represents what you'll do when your community opens back up?



Confidence

Confidence in the extra precautions taken to protect against COVID-19 doesn't vary much by how quickly people expect they will return to a normal lifestyle.

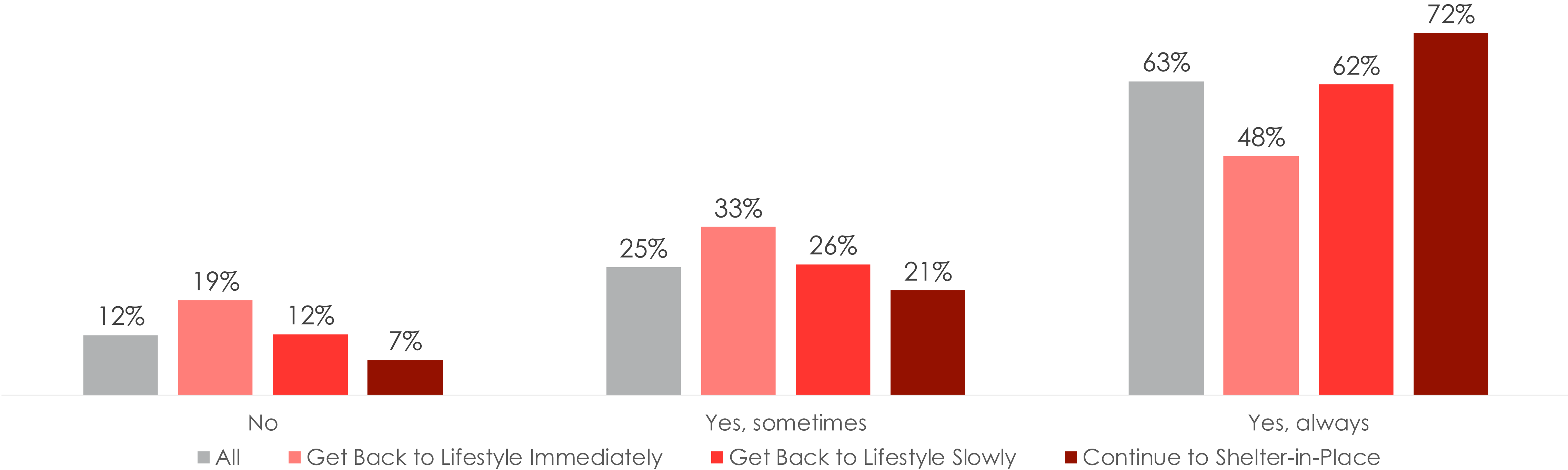
Confident in extra precautions



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 degree to which the groups are exercising precautions varies. The quicker they plan to return to a normal lifestyle, the less likely they are to wear a mask.

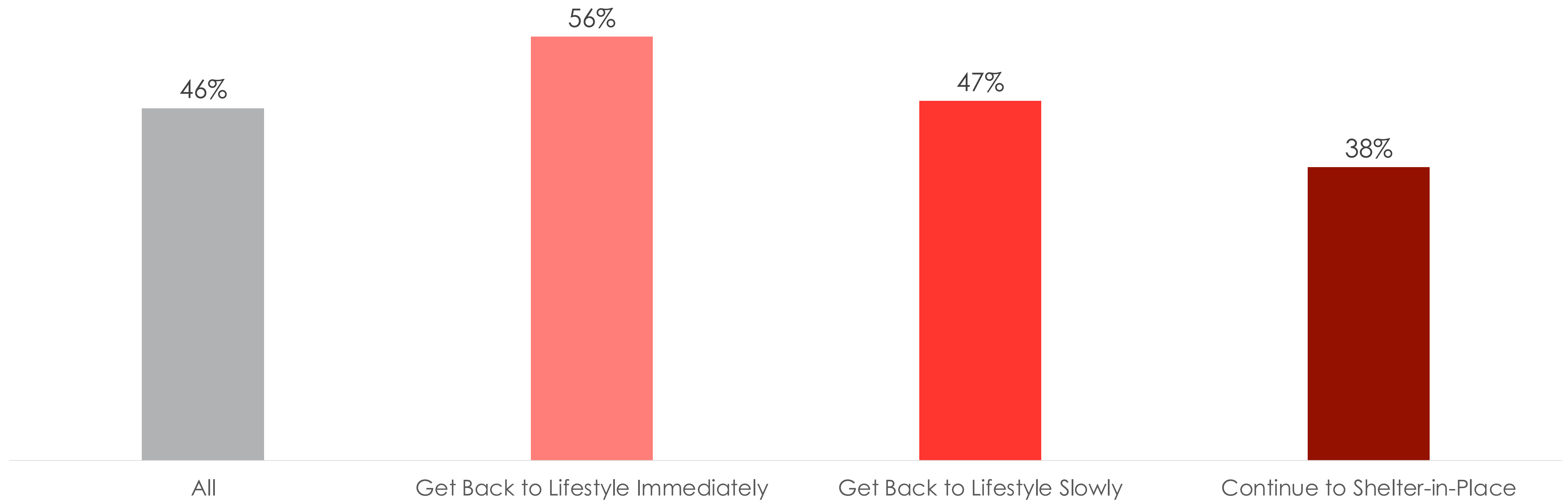
Wear a mask



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

Confidence in the job the government is doing to keep people informed steps down as planned behavior becomes less immediate. However, confidence is only 56% among those determined to move quickly.

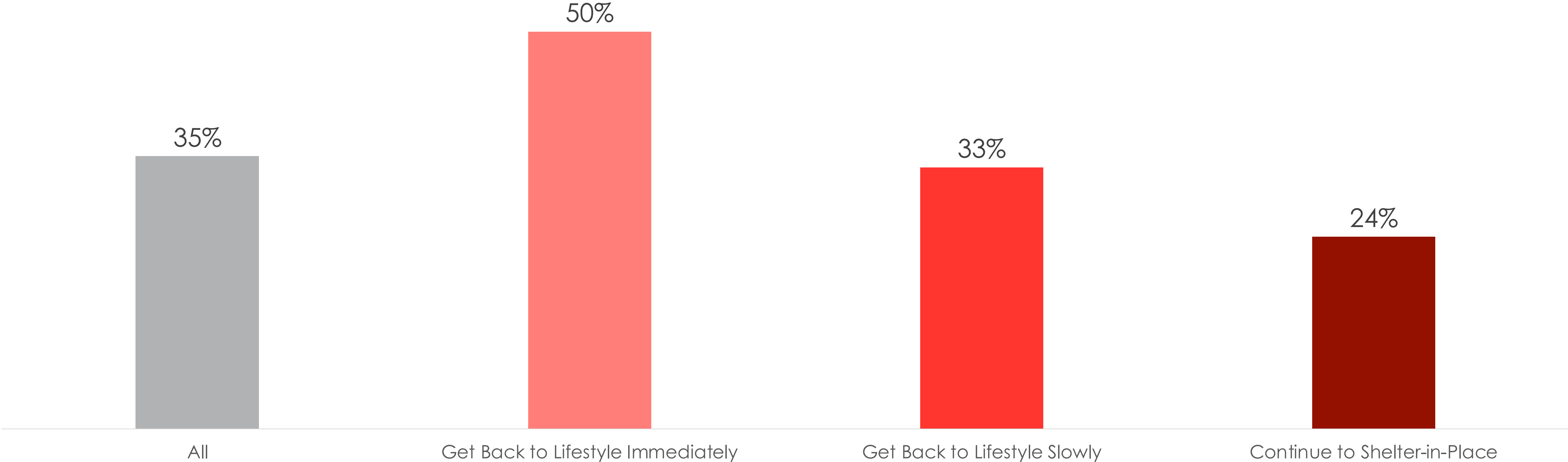
Confident that the government is keeping us up to date



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

The disparity in the level of confidence in the government's ability to deal with the outbreak is even greater. Confidence among those who'll return to their lifestyle immediately is twice as high (50%) as those who'll continue to shelter-in-place (24%).

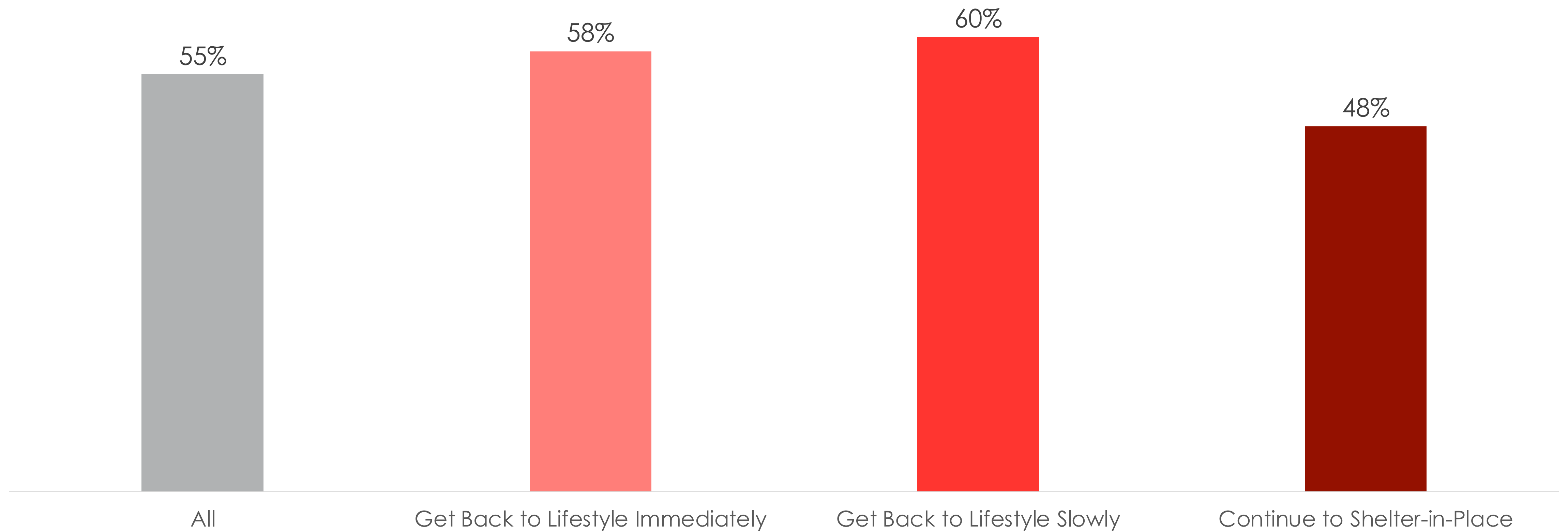
Confident that the government is prepared to handle the Coronavirus outbreak



How confident are you that the government is adequately prepared to handle a Coronavirus outbreak in the U.S.?

Confidence in their local community varies much less, but less than half (48%) of those who will continue to shelter-in-place are confident or very confident.

Confident that medical providers are prepared to handle the Coronavirus outbreak



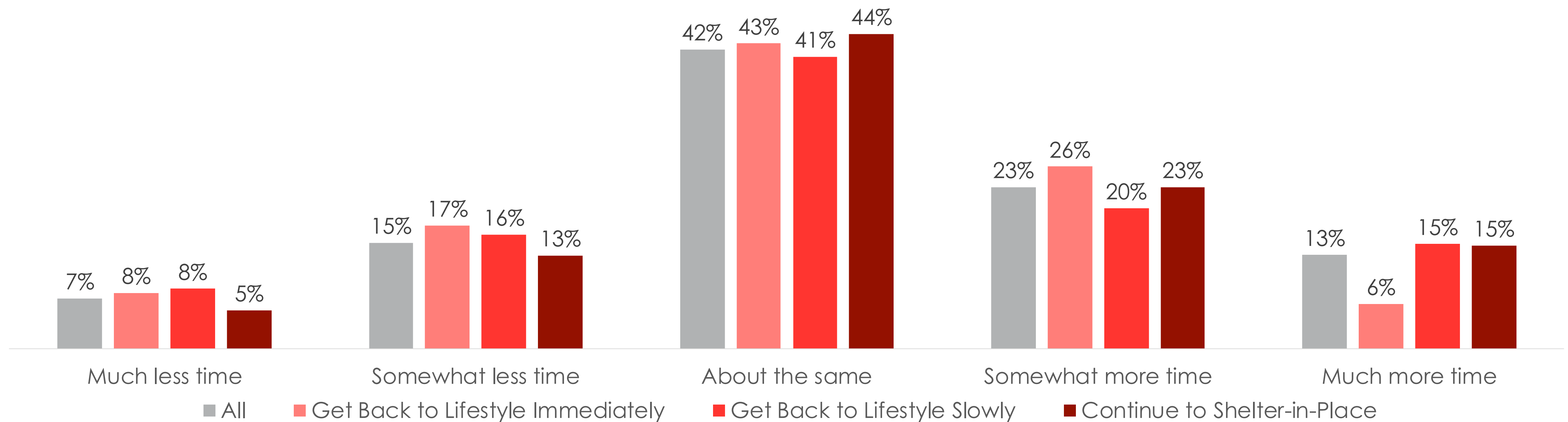
How confident are you that the medical providers (hospitals, doctors, etc.) in your community are prepared to deal with a Coronavirus outbreak?

Information



All groups are somewhat more engaged in following COVID-19 information than they were 4 weeks ago.

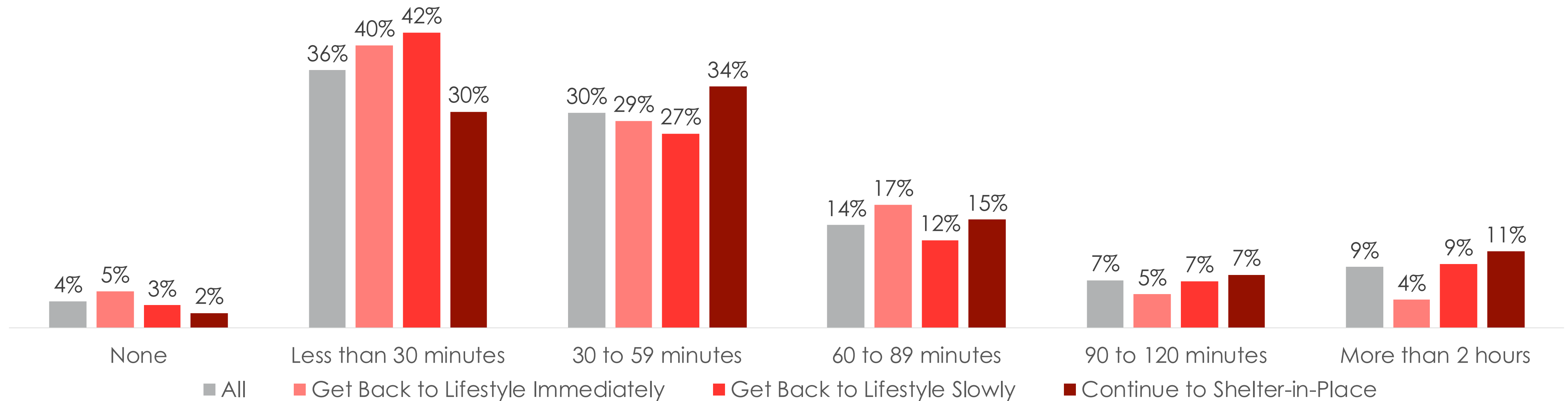
Keeping up with information compared to a month ago



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

Across all groups about two-thirds are spending less than an hour per day on COVID-19 information.

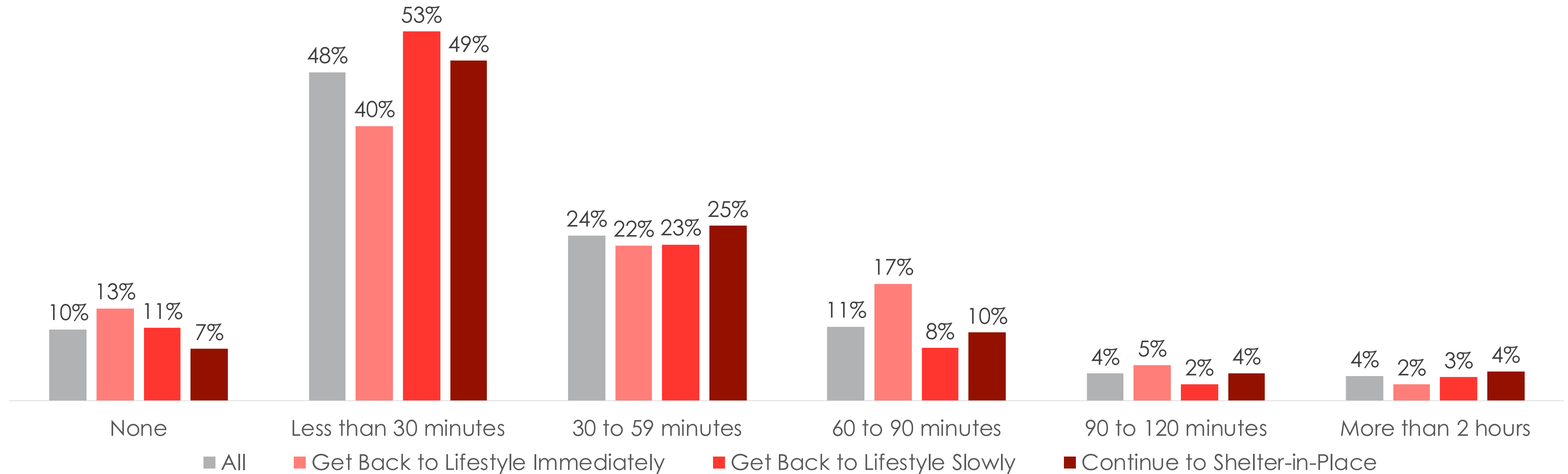
Time spent per day keeping up with Coronavirus



Approximately how much time do you spend per day staying up to date on what is going on with the Coronavirus?

Coronavirus is a subject of conversation for 90% of respondents. Nearly one-quarter of those who'll go back to their normal lifestyle immediately are talking about it an hour or more per day.

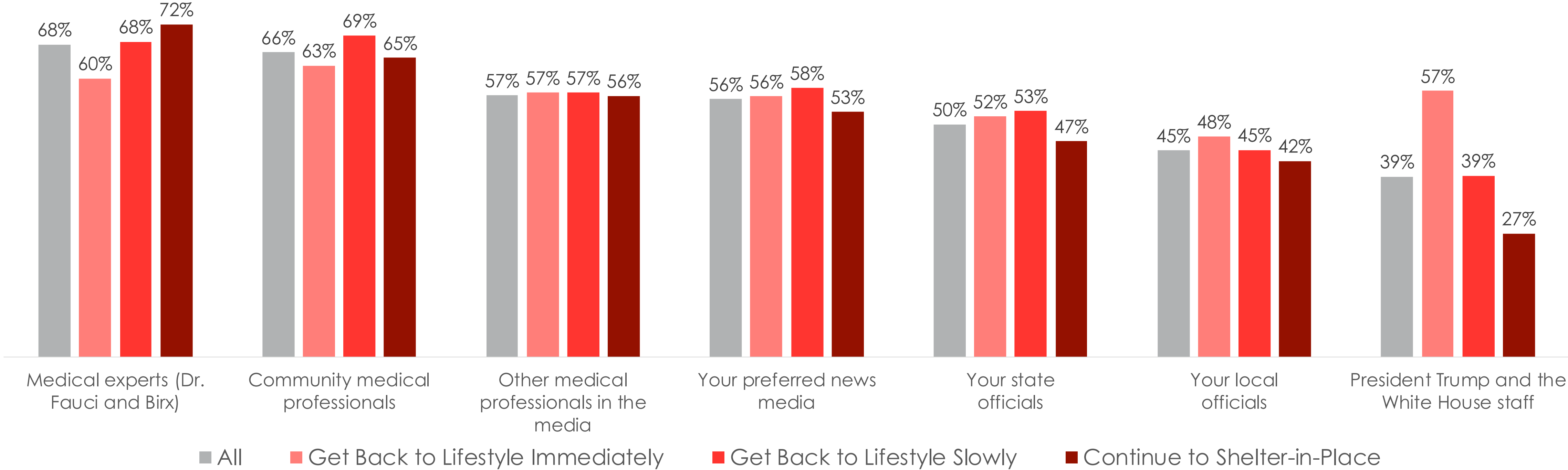
Time spent per day discussing Coronavirus



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

Those who will return to their lifestyle immediately are more than twice as likely (57% vs. 27%) to trust information from President Trump and the White House staff than those who will continue to shelter-in-place.

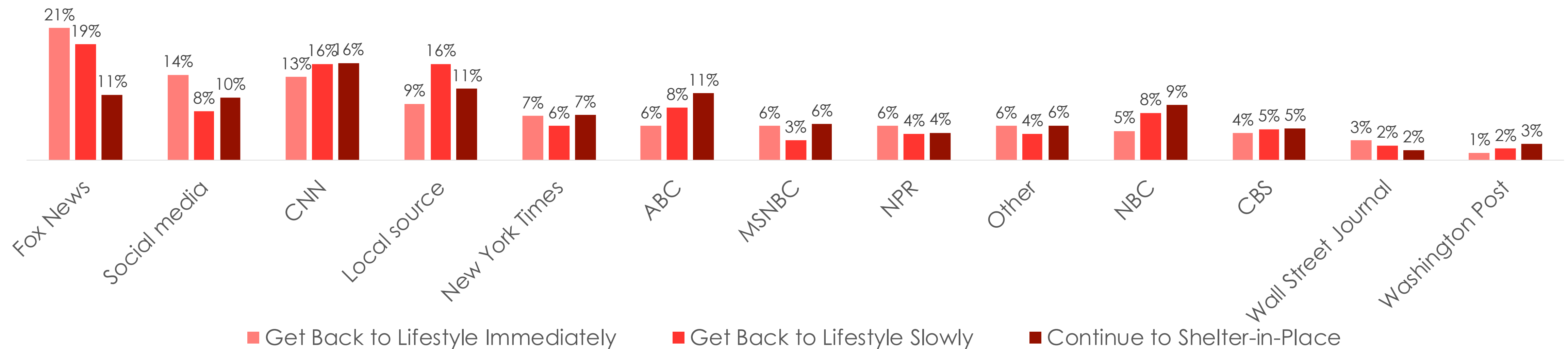
Trust information sources



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

Preferred media source is spread fairly equally among the three groups, with those who will continue to shelter-in-place significantly less likely to select Fox News than others.

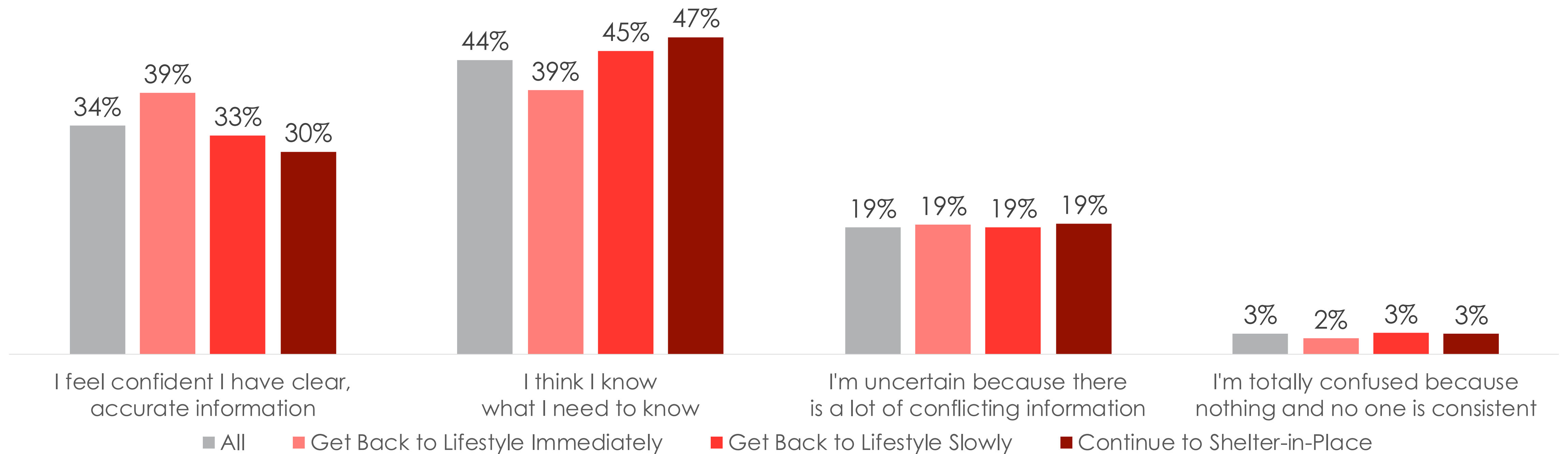
Choice for news sources



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

Nearly 80% of all groups feel that, at a minimum, they know what they need to know about COVID-19.

Feeling about personal knowledge of Coronavirus



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

Opening Up

TAQUERIA

6 PACK
OF
BEER

DELIVERY
AVAILABLE

HOURS
11 AM - 9 PM
DAILY

NO puedes entrar
sin mascara.
Gracias!



Once you have
ordered,
please wait outside



We love you, just the
way you are.
Still, you *cannot enter*
the shop unless your
face is covered.
Thank You!

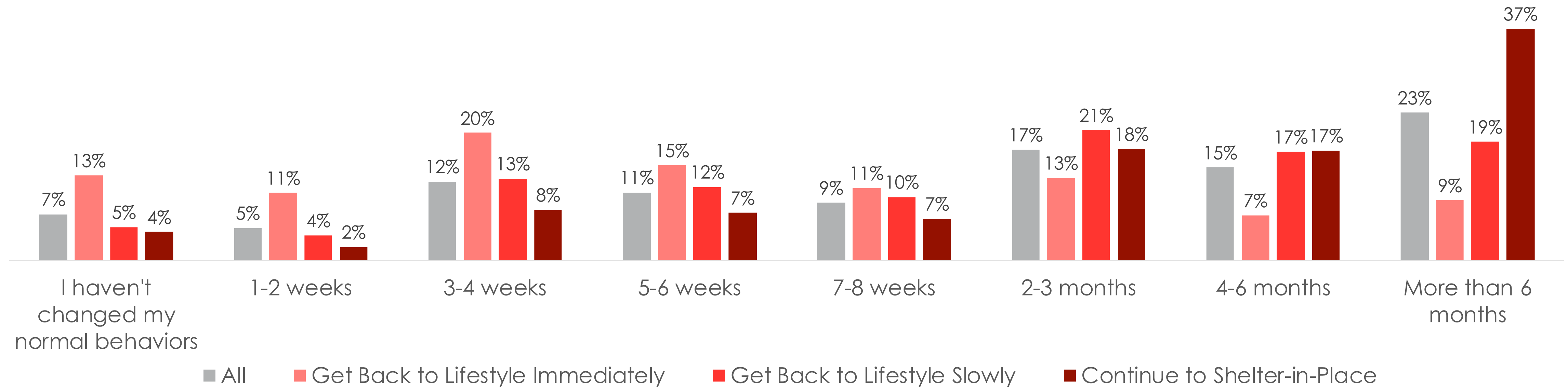


Después de ordenar,
por favor-
espera afuera

Entrar
Without
A MASK*

Not surprisingly, 59% of those who will return to normal behaviors immediately expect to be back to normal in the next 6 weeks compared to 34% and 21% of those in the more cautious groups.

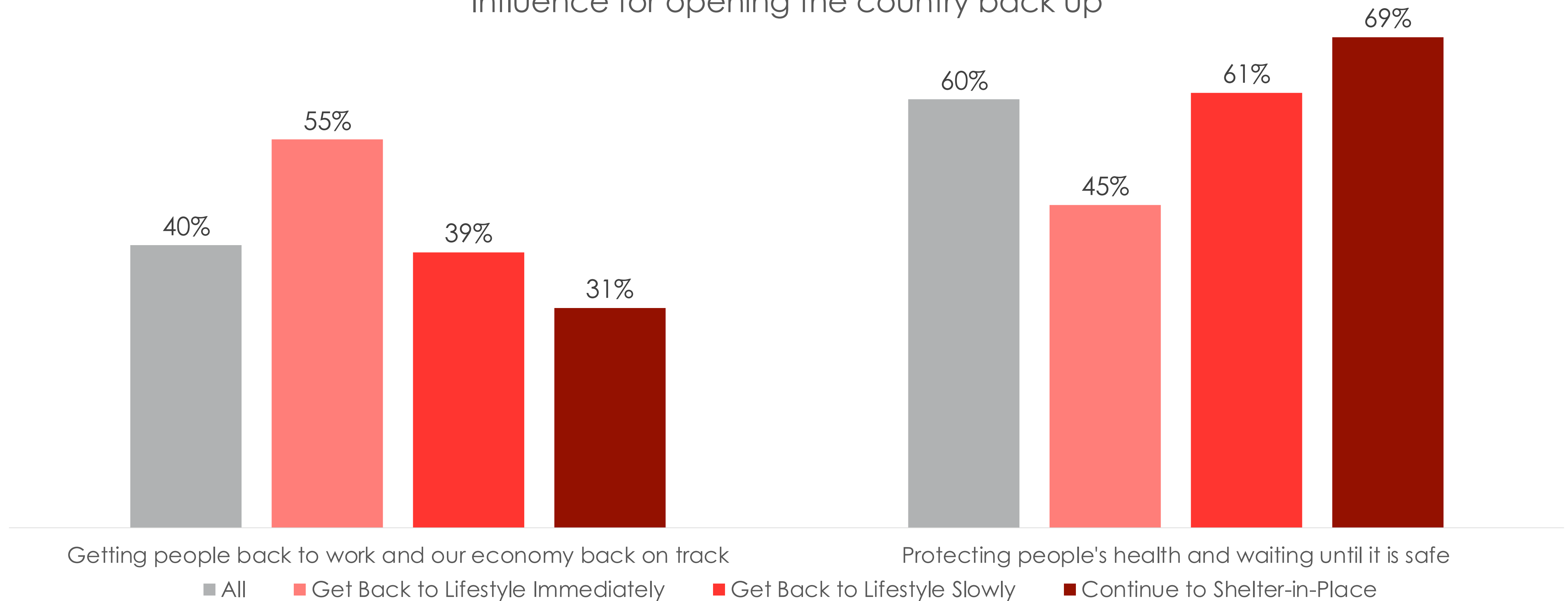
Timeframe of returning to normal behavior



When do you think it's likely that you'll return to your normal behaviors (going to work, eating out, shopping, etc.)?

Those who will return to their lifestyle immediately put more weight on the needs of the economy than people's health and safety.

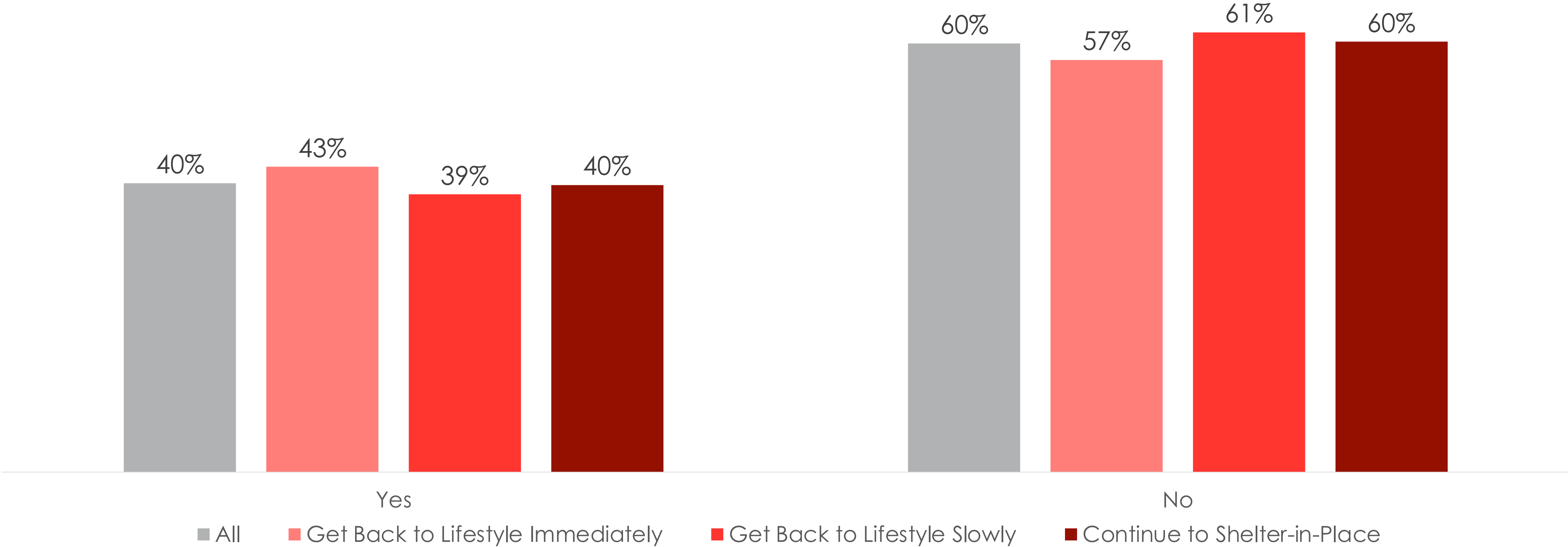
Influence for opening the country back up



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.

The focus on the economy over health is not driven by income reduction. All groups have been impacted nearly equally.

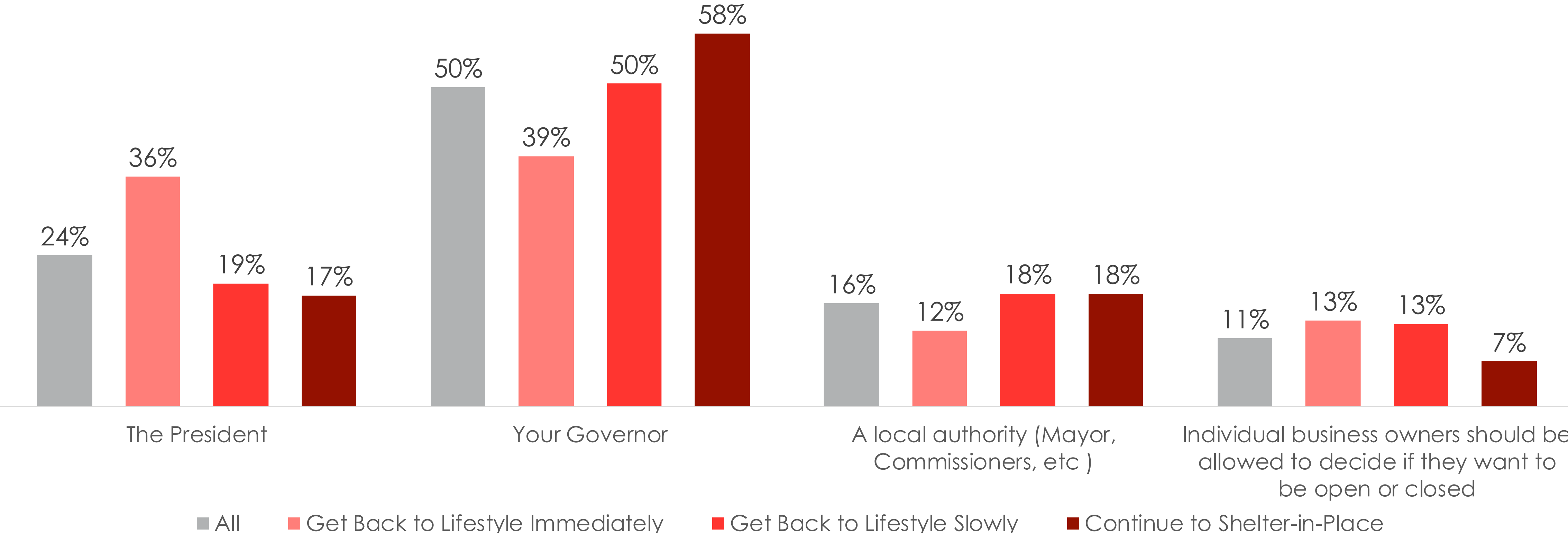
Income reduced or job lost due to Coronavirus



Have you or a member of your household lost a job or had your income reduced as a result of issues associated with the Coronavirus?

Those willing to jump back into their lifestyle immediately are twice as likely (36% vs. 18%) as the other groups to think it should be the President's call on when their community opens up.

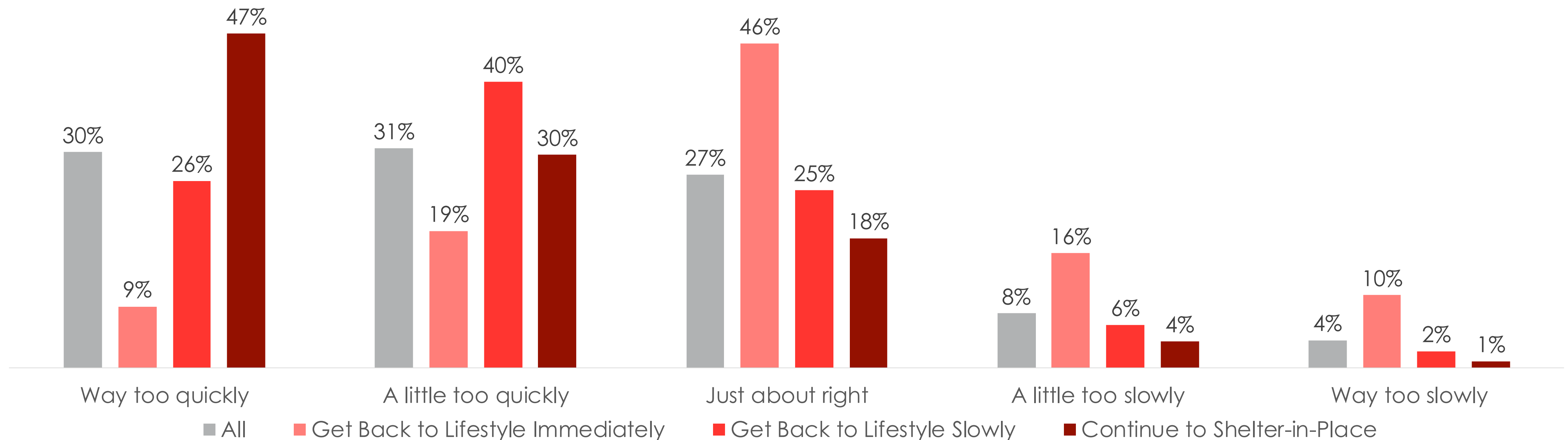
Who should have the primary authority to open/close restrictions



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?

Despite their push to get back to normal, only 26% of the people who'll return to their lifestyle immediately feel the states have moved too slowly. However, that's 5X greater than those in the other 2 groups.

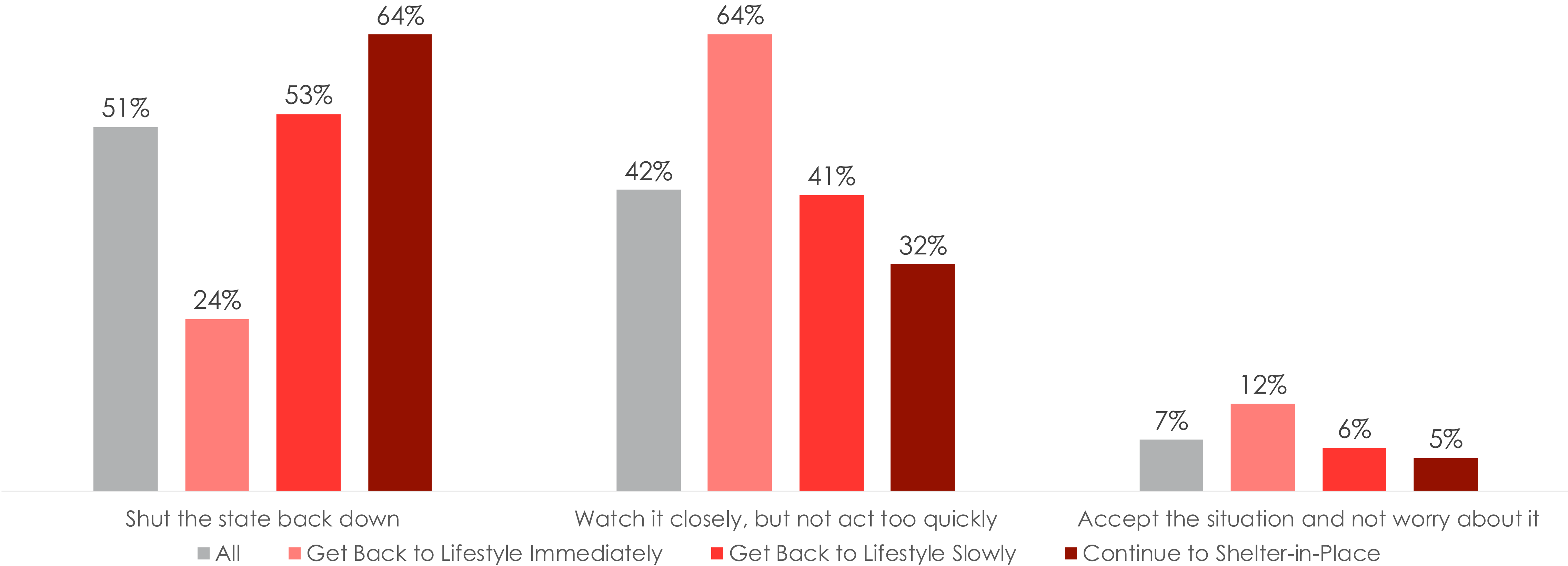
State that have opened moving too quickly/slowly



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

Those anxious to get back to normal are less than half as likely than other groups to feel that a state should shut back down immediately if cases should rise. However, only 12% feel states should accept the potential health risks associated with not being cautious.

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?

Summary

There is little consensus on how people will behave once their community opens back up.

- 24% will return to their normal lifestyle immediately, 36% will return slowly and 40% will continue to shelter in place.
- Lower-risk Millennials represent the majority (52%) of those who will return to their lifestyle immediately, but also represent 35% of those who will continue to shelter-in-place.
- Women are much more likely than men to be planning for a slower return to normalcy.

Confidence appears to play a role in respondents' intentions. However, overall confidence numbers are low.

- Those who will return immediately are 47% (56% vs. 38%) more confident that the government is keeping people up to date on the virus compared to those that will shelter-in-place.
- More dramatically, 50% of those who will return to their normal behaviors immediately think the government is prepared to handle the outbreak compared to 24% of those who will continue to shelter-in-place who believe the same.
- Confidence in their local medical community doesn't vary nearly as much among the three groups.

Respondents are taking the time to stay informed.

- All groups are spending somewhat more time accessing information about Coronavirus than they were just 4 weeks ago.

Summary - continued

- While COVID-19 is a major point of interest, two-thirds of each group are spending an hour or less per day keeping up with it.
- Coronavirus is a subject of conversation for nearly everyone (90%).
- Trust in information sources is very similar across the groups with the notable exception of President Trump and the White House, where those returning to normal behaviors immediately are more than twice as likely (57% v. 27%) to trust the information as those who will shelter-in-place.
- People that want to get back to normal behavior immediately are much more likely to turn to Fox News for information about COVID-19, follow by social media.
- Nearly 80% of all groups feel, at a minimum, that they know what they need to know about COVID-19.

The subject of opening communities up demonstrates additional differences in the three groups.

- 59% of those who will return to normal behaviors immediately believe that opportunity will be available to them in the next 6 weeks compared to 34% and 21% for the other two groups.
- While not driven by their income loss, which is fairly equal across the three groups, those who will return to normal immediately put significantly more emphasis on the economic need to open than the health and safety of the people.

Summary - continued

- Those willing to jump back into their lifestyle immediately are twice as likely (36% v. 18%) as the other groups to think it should be the President's call on when their community opens.
- Despite their push to get back to normal, only 26% of the people who will return immediately feel the states have moved too slowly. However, that's 5X greater than those in the other 2 groups.
- Those anxious to get back to normal are less than half as likely than other groups to feel that a state should shut back down immediately if cases should rise. However, only 12% feel states should accept the potential health risks associated with not being cautious.