The Great Reopening
Attitudes, values and lives moving forward

May 7, 2020
American Fear Remains Ever-Present, Even as States Begin to Reopen

Q18 Which of the following is true for you?

“I fear I could die as a result of contracting coronavirus”

- 54% thought national fear was irrational
- 27%
- 28%
- 35%
- 43%
- 47%
- 44%
- 56%
- 51%
- 51%

74% now think national fear is sensible

Source: Harris Poll COVID19 Tracker Wave 2-10
BASE: GENERAL PUBLIC W2 (2050); W3 (2019); W4 (2023) W5 (2015); W6 (1993); W7 (2013); W8 (2029); W9 (2050); W10 (2039)

Cases: 3,600
Deaths: 0

Cases: 6,300
Deaths: 100

Cases: 43,781
Deaths: 550

Cases: 123,678
Deaths: 3,000

Cases: 336,673
Deaths: 16,700+

Cases: 640,291
Deaths: 31,000+

Cases: 827,038
Deaths: 60,000+

Cases: 1,000,000+
Deaths: 70,000+

Wave 2 (3/14 - 3/15)
Wave 3 (3/17 - 3/18)
Wave 4 (3/21 - 3/23)
Wave 5 (3/28 - 3/30)
Wave 6 (4/3 - 4/5)
Wave 7 (4/11 - 4/13)
Wave 8 (4/18-4/20)
Wave 9 (4/25 - 4/27)
Wave 10 (5/1 - 5/3)
Trended Fear Curves During COVID19

- Fear ventilator shortage: 74%
- Fear of dying: 27%
- Fear losing their job: 56%
- Fear of global recession: 84%
- Fear of leaving home for essential errands: 80%
- Fear of returning to public activity: 73%
- Fear of going to work: 77%
- Fear of economic recession: 75%

Wave 2 (3/14-3/15)
Wave 3 (3/17-3/18)
Wave 4 (3/21-3/23)
Wave 5 (3/28-3/30)
Wave 6 (4/3-4/5)
Wave 7 (4/11-4/13)
Wave 8 (4/18-4/20)
Wave 9 (4/25-4/27)
Wave 10 (5/1-5/3)
We Are Experiencing a Mix of Emotions Under Quarantine

Have you felt any of the following since the stay-home orders have gone into effect?

- Appreciative: 75%
- Compassionate: 73%
- Cabin fever: 55%
- Grateful: 50%
- Angry: 49%
- Lonely: 47%
- Fear: 43%
- Overwhelmed: 35%
- Claustrophobic: 35%
- Annoyed: 33%
- Parents: 78% Appreciative, 51% Angry, 37% Overwhelmed
- Non-Parents: 70% Appreciative, 45% Angry, 30% Overwhelmed

Source: Harris Poll COVID19 Tracker Wave 2-10
BASE: GENERAL PUBLIC W10 (2039)
FR01_1 Have you felt any of the following since the stay-home orders have gone into effect?
Major Purchases Planned Once Things Return To Normal

- Despite financial hardship (31% have had to cut back on savings), Americans are planning to catch up on spending once things return to normal.

- Americans are nearly twice as likely to be planning major gift purchases when business reopens than they were five weeks ago (21% vs. 12% on March 28).
  - Parents especially (25% vs 16%) want to splurge on their families, (43%) of whom feel regret for the emotional toll the crisis has taken their children during stay-home orders.

- They are also nearly twice as likely to buy a car once things return to normal as they were on March 28th (19% vs 11%).

Source: Harris Poll COVID19 Tracker Wave 2-10
BASE: PLANNING A MAJOR PURCHASE (1276)
REV01 Are you planning any major purchases once things return to normal and businesses re-open? Please select all that apply.
Employees Will Wait to Return to the Office Until Safety Measures Are Met

Once the government provides information that the spread of the virus is flattening how long will it take you to go to the office?

(Immediately/1-30 days)

- 63% Wave 4 (3/21-3/18)
- 49% Wave 10 (5/1-5/3)

84% Agree

“If work is able to be done remotely, employers should not require employees to return to the office until COVID-19 is no longer a threat.”

16% disagree

83% Agree

“Employees should be allowed to work-from-home during the pandemic until they feel comfortable to return.”

17% disagree

Source: Harris Poll COVID19 Tracker Wave 2-10
BASE: GENERAL PUBLIC W10 (2039)
Q33B Once the government provides information that the spread of the virus is flattening how long will it take you to do each of the following.
EMP17 As social distancing restrictions related to the COVID-19 pandemic end, offices that previously introduced work-from-home policies will begin to re-open. How much do you agree or disagree with each of the following?

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Three-Fifths Will Go Back to the Office at Least Part-Time as Soon as Restrictions Are Lifted

As social distancing restrictions are eased off and things begin to return to normal, which of the following comes closest to your point of view in returning to working from an office?

- I will return to work full-time from the office as soon as I am allowed
- I have been working from the office full-time during the pandemic
- I prefer to work-from-home until I feel more safe in being in close proximity to others
- I will work from the office as soon as I am allowed, but only for a few days a week to reduce interaction with others

61% Will Return at Least a Few Days a Week

Source: Harris Poll COVID19 Tracker Wave 10
BASE: OFFICE WORKERS W10 (2039)
EMP16 As social distancing restrictions are eased off and things begin to return to normal, which of the following comes closest to your point of view in returning to working from an office?
If you were to shop for new clothes over the next few months, how do you think your shopping preferences will change compared to before the pandemic for both online and in-person shopping?

![Bar chart showing shopping preferences change]

Compared to before COVID-19, how do you anticipate your spending after the pandemic will change, if at all, in each of the following categories?

<table>
<thead>
<tr>
<th>Category</th>
<th>More</th>
<th>No Change</th>
<th>Less</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal care</td>
<td>22%</td>
<td>64%</td>
<td>14%</td>
</tr>
<tr>
<td>Groceries</td>
<td>22%</td>
<td>50%</td>
<td>28%</td>
</tr>
<tr>
<td>Leisure travel</td>
<td>22%</td>
<td>54%</td>
<td>25%</td>
</tr>
<tr>
<td>Medical products</td>
<td>20%</td>
<td>50%</td>
<td>24%</td>
</tr>
<tr>
<td>Movies/shows</td>
<td>25%</td>
<td>54%</td>
<td>25%</td>
</tr>
<tr>
<td>Apparel</td>
<td>15%</td>
<td>60%</td>
<td>15%</td>
</tr>
<tr>
<td>Consumer electronics</td>
<td>15%</td>
<td>60%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Source: Harris Poll COVID19 Tracker Wave 2-10
BASE: GENERAL PUBLIC W10 (2039)

APP03 As social distancing restrictions related to the COVID-19 pandemic end, clothing retail stores will begin to open back up in your area. If you were to shop for new clothes over the next few months, how do you think your shopping preferences will change compared to before the pandemic for both online and in-person shopping?
# Most Americans Are Willing to Buy Most Items Online Instead of In-Store During the Pandemic

Assuming you were shopping for each of the below items in the near future, which of the following are you *not* **willing to purchase online** during the pandemic?

<table>
<thead>
<tr>
<th>Item</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Car</td>
<td>53%</td>
</tr>
<tr>
<td>House or apartment to rent</td>
<td>50%</td>
</tr>
<tr>
<td>Furniture</td>
<td>36%</td>
</tr>
<tr>
<td>Clothes</td>
<td>19%</td>
</tr>
<tr>
<td>Consumer electronics</td>
<td>18%</td>
</tr>
<tr>
<td>Personal care</td>
<td>17%</td>
</tr>
<tr>
<td>Household items</td>
<td>15%</td>
</tr>
<tr>
<td>I am willing to purchase all of these items online during the pandemic</td>
<td>24%</td>
</tr>
</tbody>
</table>

Source: Harris Poll COVID19 Tracker Wave 2-10
BASE: GENERAL PUBLIC W10 (2039)

**AUT01** Assuming you were shopping for each of the below items in the near future, which of the following are you not willing to purchase online during the pandemic?
Majority of Americans Are Aware of Potential Meat Shortages; Half Are Stocking Up

How much are you aware of a potential shortage of meat in the U.S. due to COVID-19?

- Very aware: 37%
- Somewhat aware: 44%
- Not very aware: 12%
- Not at all aware: 8%

As a result of COVID-19, are you currently stocking up on any of the following due to the potential shortage of meat products in the U.S.?

- Chicken: 41%
- Beef: 37%
- Pork: 27%
- Fish: 27%
- Meat alternative: 17%

50% are stocking up on at least 1 meat

Source: Harris Poll COVID19 Tracker Wave 2-10 (2020)
BASE: GENERAL PUBLIC W10
MET01 How much are you aware of a potential shortage of meat in the U.S. due to COVID-19?
MET02 As a result of COVID-19, are you currently stocking up on any of the following due to the potential shortage of meat products in the U.S.?
Recently, major airlines announced a policy that will require passengers to wear a face mask while traveling on a flight during the COVID-19 pandemic.

Given this announcement, which of the following comes closest to your point of view?

- **Until the pandemic is fully over, I will not be comfortable flying again.**
  - 48%

- **If mixed with additional safety and sanitation measures, it would make me feel comfortable to fly again.**
  - 28%

- **It is enough to make me feel comfortable to fly again.**
  - 12%

- **Wearing a mask is uncomfortable and inconvenient to wear, and I will avoid flying until the policy is removed.**
  - 12%

40% would be comfortable flying with some mix of safety precautions.
Despite New Mask Policies, Half Not Comfortable Flying Until the Pandemic Is Fully Over

As airlines introduced increased safety measures related to the ongoing COVID-19 pandemic, passengers may be required to arrive at the airport at least 4 hours before their flight.

Given this increased wait time, are you more or less to book a flight the next time you need to travel?

<table>
<thead>
<tr>
<th>Age Group</th>
<th>% More Likely</th>
<th>% Less Likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gen Z/Millennials</td>
<td>29%</td>
<td>71%</td>
</tr>
<tr>
<td>Gen X</td>
<td>27%</td>
<td>73%</td>
</tr>
<tr>
<td>Boomers</td>
<td>13%</td>
<td>87%</td>
</tr>
<tr>
<td>Seniors</td>
<td>14%</td>
<td>86%</td>
</tr>
</tbody>
</table>

Source: Harris Poll COVID19 Tracker Wave 2-10
BASE: GENERAL PUBLIC W10 (2039)
AIR02  As airlines introduced increased safety measures related to the ongoing COVID-19 pandemic, some experts are saying that over the next few years passengers may be required to arrive at the airport at least 4 hours before their flight. Given this increased wait time, are you more or less to book a flight the next time you need to travel.
THE HARRIS POLL: COVID-19 IN THE U.S.

Who’s Coming Back First

Once the government provides information that the spread of the virus is flattening how long will it take you to do each of the following?

**Fly on a plane**
- 20% Men
- 26% 1 year or longer
- 14% Gen Z/Millennials 1-30 days
- 12% 1 year or longer
- 4% Seniors 65+ 1-30 days
- 33% Seniors 65+
- 31% Women

**Stay in a hotel**
- 20% 1 year or longer
- 14% 1-30 days
- 17% 1 year or longer
- 15% 1-30 days
Which of the following industries do you think should provide solutions during the Covid-19 outbreak?

How has your view of each of the following industries changed since the start of the coronavirus pandemic? More Positive

<table>
<thead>
<tr>
<th>Industry</th>
<th>More Positive</th>
<th>More Negative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Healthcare (Doctors/Nurses/Hospital)</td>
<td>58%</td>
<td>62%</td>
</tr>
<tr>
<td>Retail - grocery</td>
<td>31%</td>
<td>49%</td>
</tr>
<tr>
<td>Small Businesses</td>
<td>19%</td>
<td>42%</td>
</tr>
<tr>
<td>Technology</td>
<td>40%</td>
<td>39%</td>
</tr>
<tr>
<td>Pharmaceutical/drugs</td>
<td>39%</td>
<td>57%</td>
</tr>
<tr>
<td>Restaurants</td>
<td>25%</td>
<td>39%</td>
</tr>
<tr>
<td>Media</td>
<td>27%</td>
<td>38%</td>
</tr>
<tr>
<td>Financial services</td>
<td>24%</td>
<td>28%</td>
</tr>
<tr>
<td>Retail - apparel</td>
<td>14%</td>
<td>23%</td>
</tr>
<tr>
<td>Automotive</td>
<td>15%</td>
<td>22%</td>
</tr>
<tr>
<td>Airlines</td>
<td>19%</td>
<td>23%</td>
</tr>
<tr>
<td>Real estate</td>
<td>12%</td>
<td>17%</td>
</tr>
</tbody>
</table>

Source: Harris Poll COVID19 Tracker Wave 2-10
BASE: GENERAL PUBLIC W10 (2039)
Q38 How has your view of each of the following industries changed since the start of the coronavirus pandemic?
Public Feels More **Negative** Toward Media, Travel, Airlines Industries since the Start of COVID19

Feel **More Negative** Toward Industry Since Start of Coronavirus Pandemic

- Media: 29%
- Travel and hospitality (hotels, cruise lines): 28%
- Airlines: 26%
- Restaurants: 17%
- Financial services: 17%
- Pharmaceutical/drugs: 15%
- Entertainment: 15%
- Oil: 15%
- Real estate: 14%
- Retail: 14%
- Manufacturing: 13%
- Retail - grocery: 12%
- Automotive: 11%
- Small Businesses: 11%
- Healthcare (Doctors/Nurses/Hospital): 10%
- Non-profits: 10%
- Telecommunications: 10%
- Food & Beverage: 10%
- Technology: 8%

Source: Harris Poll COVID19 Tracker Wave 2-9
BASE: GENERAL PUBLIC W4 (2023) W7 (2013, W9 (2050))
Q38 How has your view of each of the following industries changed since the start of the coronavirus pandemic?
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Select Industry Reputation Trends (% Positive Reputation; 5, 6, or 7 on a 7-point scale)

Base: All gen pop respondents (n=25,880)

Q1314  For this question, we'd like you to think about industries in general. How would you rate the overall reputation of the following industries, where "1" means the industry has a "Very Bad" reputation and "7" means the industry has a "Very Good" reputation?


% Change Jan – Apr 2020

81% Retail Grocery +8
80% Technology +5
72% Consumer Products +9
66% Manufacturing +8
65% Automotive +4
56% Financial Services +8
52% Health insurance +18
49% Pharmaceutical +17
35% Government +10
21% Tobacco +4
The Reputation Gainers (left to right) during COVID-19

Industry Trends (% Positive Reputation; 5, 6, or 7 on a 7-point scale)

<table>
<thead>
<tr>
<th>Industry</th>
<th>Jan-20</th>
<th>Apr-20</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Insurance</td>
<td>52%</td>
<td>34%</td>
</tr>
<tr>
<td>Pharma</td>
<td>49%</td>
<td>32%</td>
</tr>
<tr>
<td>Media</td>
<td>49%</td>
<td>35%</td>
</tr>
<tr>
<td>Energy</td>
<td>51%</td>
<td>35%</td>
</tr>
<tr>
<td>Gov't</td>
<td>63%</td>
<td>25%</td>
</tr>
<tr>
<td>Consumer Products</td>
<td>72%</td>
<td>73%</td>
</tr>
<tr>
<td>Grocery</td>
<td>63%</td>
<td>56%</td>
</tr>
<tr>
<td>Telecom</td>
<td>72%</td>
<td>48%</td>
</tr>
<tr>
<td>Financial Services</td>
<td>64%</td>
<td>63%</td>
</tr>
<tr>
<td>Retail (apparel)</td>
<td>81%</td>
<td>70%</td>
</tr>
<tr>
<td>Technology</td>
<td>70%</td>
<td>75%</td>
</tr>
<tr>
<td>Automotive</td>
<td>65%</td>
<td>61%</td>
</tr>
<tr>
<td>Tobacco</td>
<td>21%</td>
<td>17%</td>
</tr>
</tbody>
</table>

GAP: Health Insurance +18, Pharma +17, Media +14, Energy +12, Gov't +10, Consumer Products +9, Grocery +8, Telecom +8, Financial Services +8, Retail (apparel) +7, Technology +5, Automotive +4, Tobacco +4

Base: All gen pop respondents (Jan 2020: n=25,880, April 2020: n=3,882) Q1314. For this question, we’d like you to think about industries in general. How would you rate the overall reputation of the following industries, where "1" means the industry has a “Very Bad” reputation and “7” means the industry has a “Very Good” reputation?