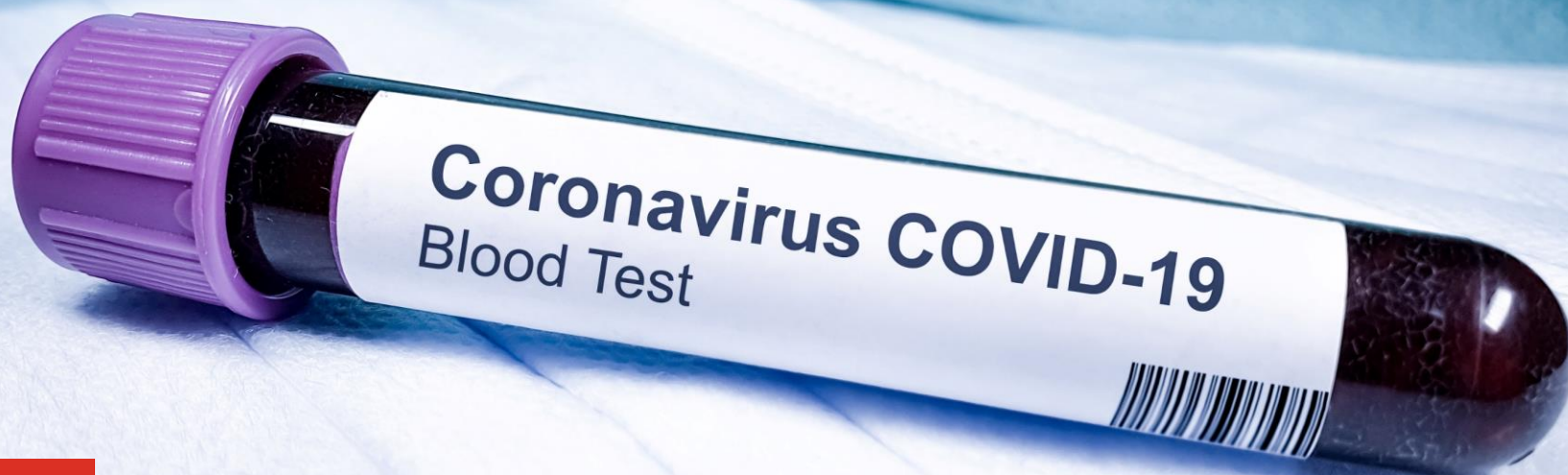




PUBLIC OPINION
STRATEGIES

turning questions into answers



National Public Opinion Data: The Coronavirus

PREPARED BY:

Jarrett Lewis, Partner

April 7, 2020



General Coronavirus Sentiment

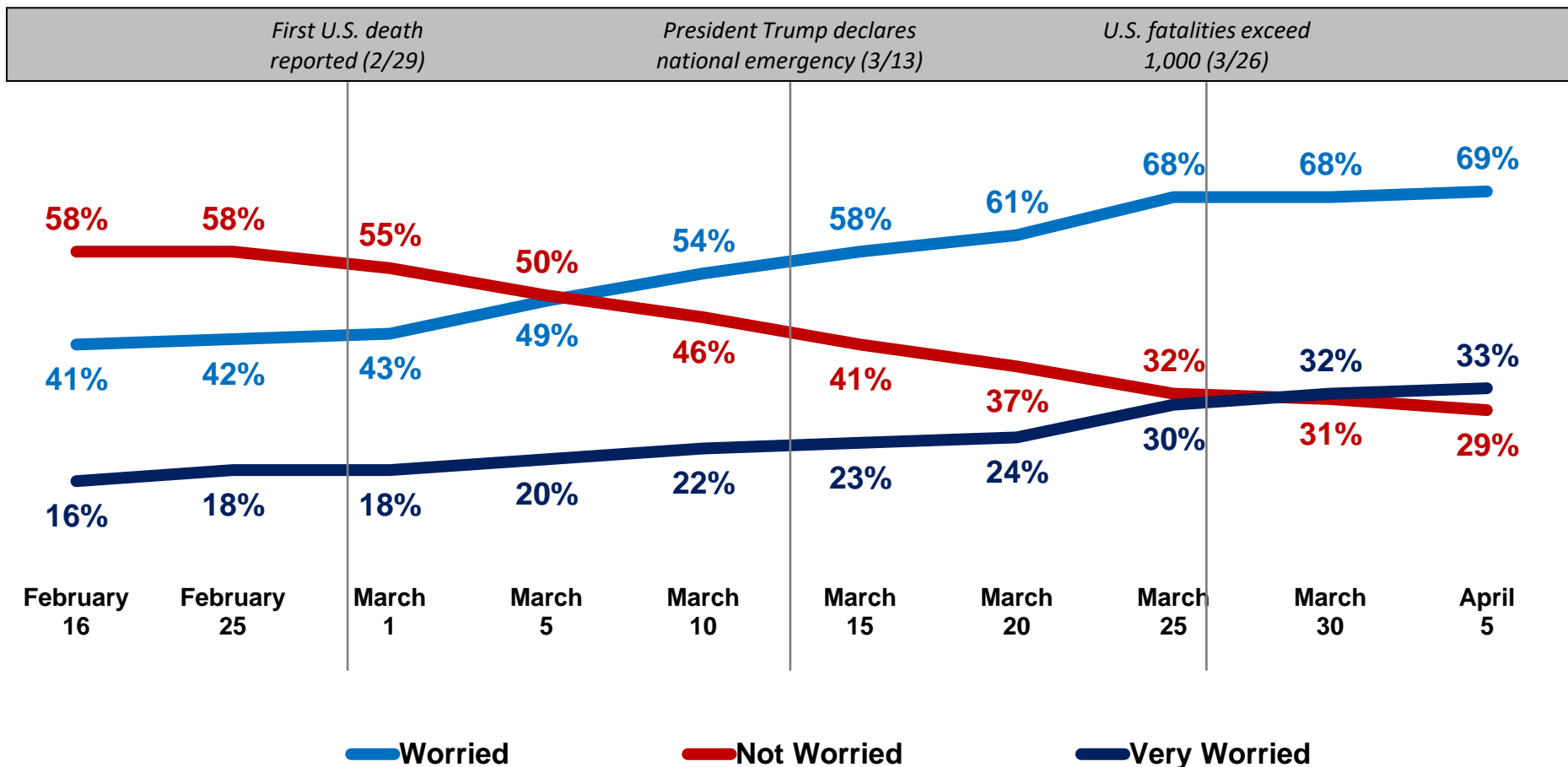
Without question, the Coronavirus (and its effects) is the top issue facing the country.

What would you say are the most important issues facing the country today?

	January 2020	March 2020
<i>Coronavirus/COVID-19</i>	N/A	60%
<i>Healthcare</i>	38%	39%
<i>Economy and Jobs</i>	24%	35%
<i>Immigration</i>	29%	20%
<i>Environment/Climate Change</i>	23%	18%
<i>National debt/Federal Budget Deficit</i>	19%	15%
<i>Terrorism/National Security</i>	26%	14%
<i>Corruption</i>	15%	11%
<i>Taxes</i>	12%	9%
<i>Crime and Drugs</i>	13%	9%
<i>Income Inequality</i>	11%	8%
<i>Education</i>	11%	8%
<i>School Safety</i>	8%	7%
<i>Foreign Policy</i>	9%	5%

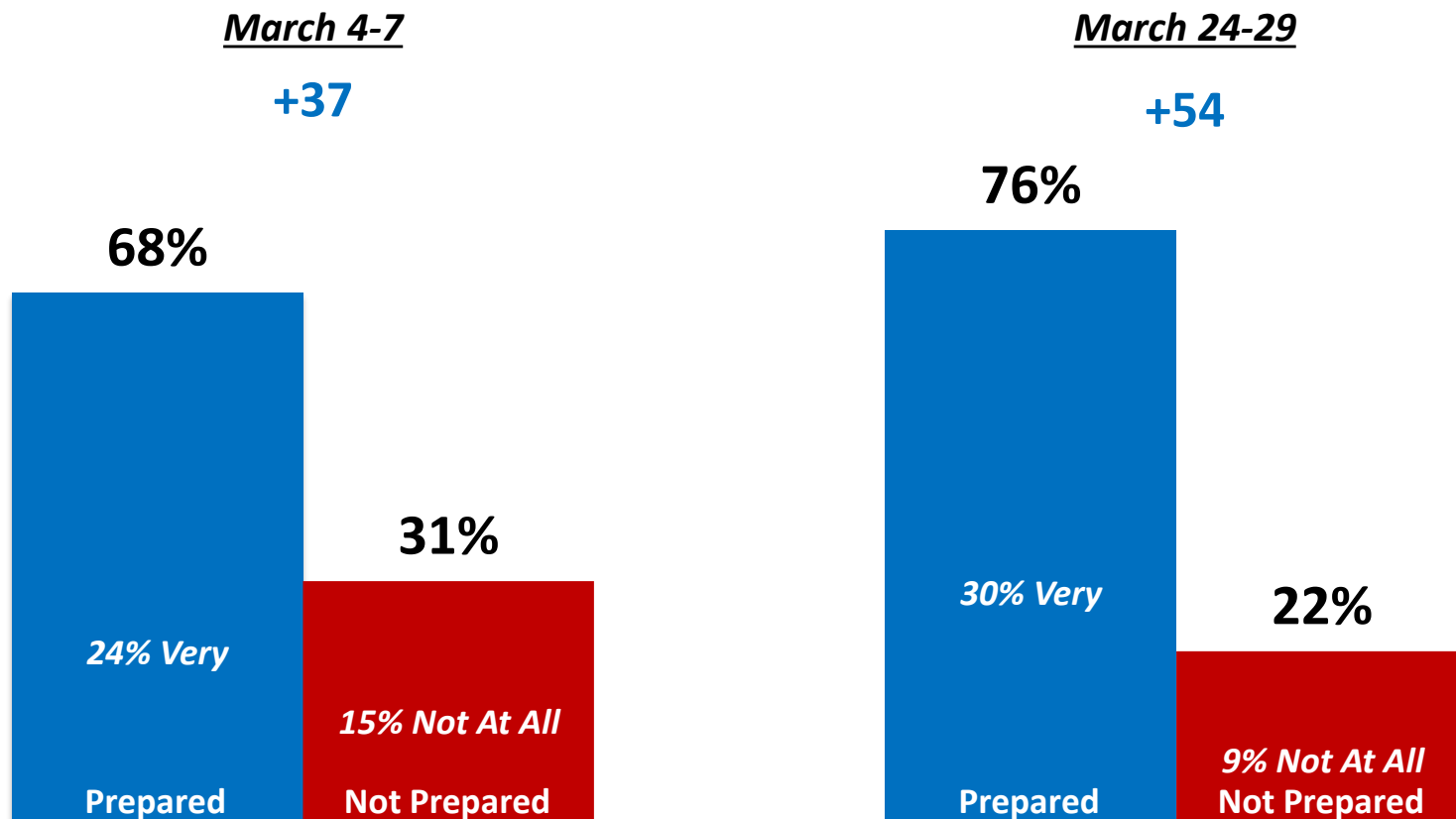
Seven in ten Americans are personally concerned about themselves or a family member getting the Coronavirus.

How concerned Americans say they are that they, someone in their family or someone else they know will become infected with the coronavirus.



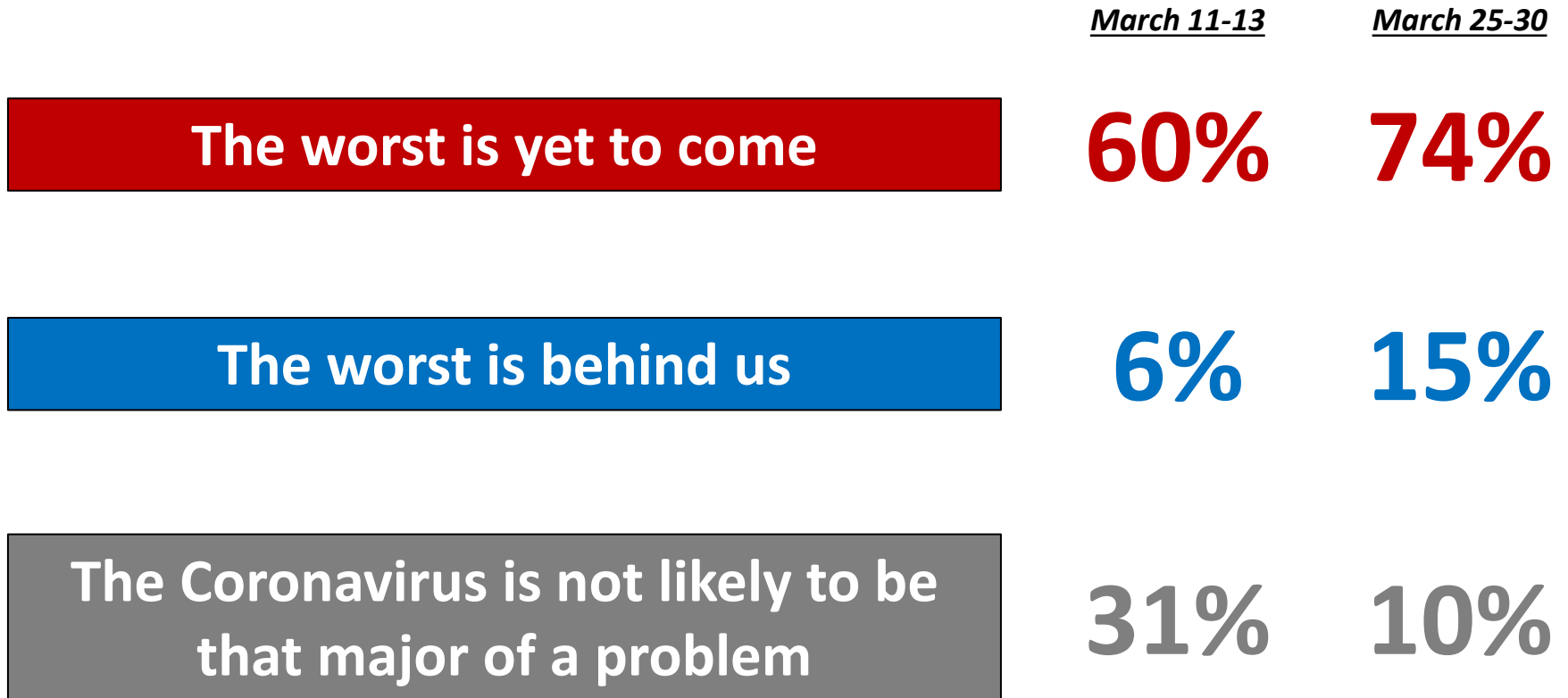
Three-quarters of Americans say they feel prepared for dealing with a Coronavirus infection.

Overall, how prepared do you think you are to deal with a coronavirus infection if you or someone in your family contracted the virus? Would you say you feel very prepared, somewhat prepared, not too prepared, or not at all prepared to respond to that?



Three-quarters of Americans believe the worst is yet to come.

Which of the following best describes your feelings about the coronavirus outbreak in the United States?



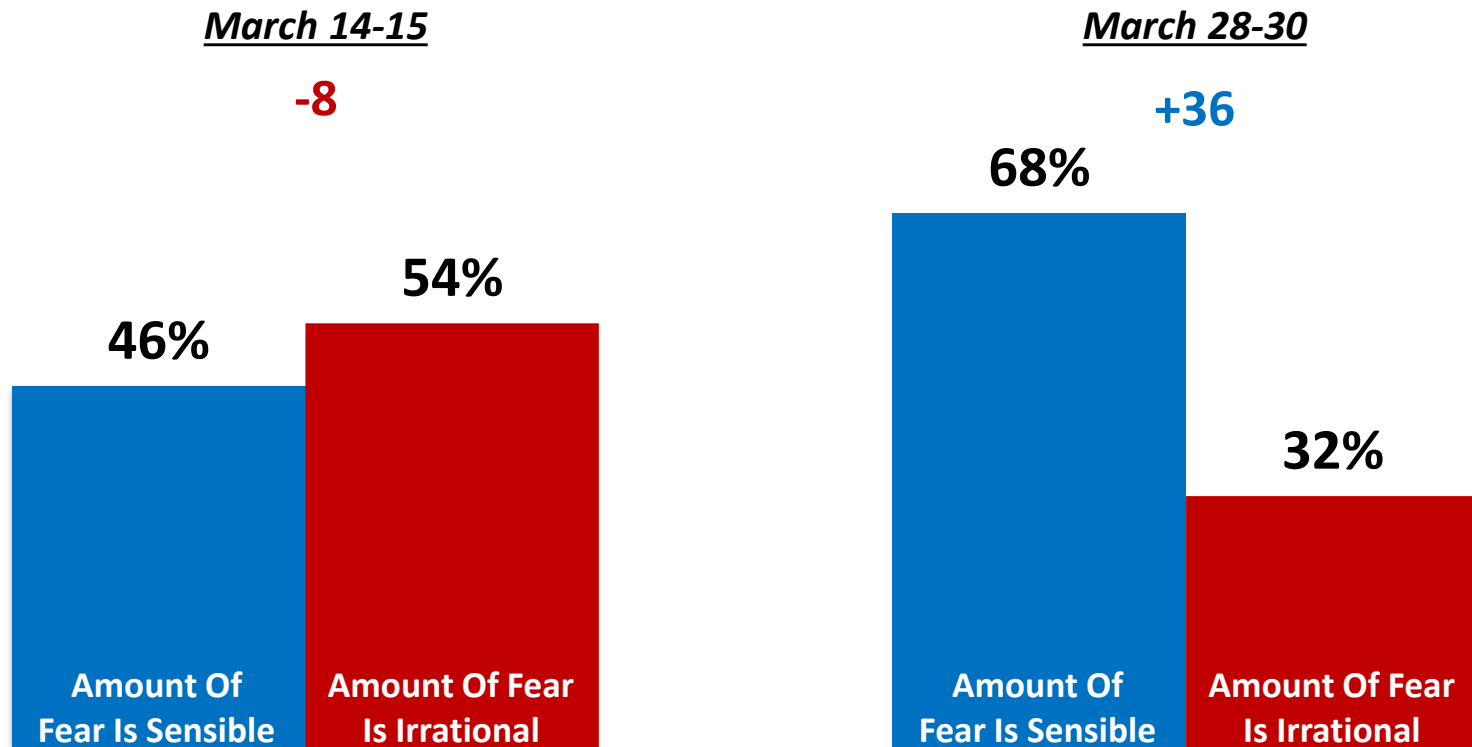
Opinions about the seriousness/gravity of the Coronavirus have shifted at a remarkable pace.

Which of the following is closest to your view of people's reaction to the coronavirus COVID-19) outbreak?

I think the amount of fear is sensible given how serious the pandemic has become

...OR...

The amount of fear is irrational, people are overreacting



Sources: Harris National Survey of 2,050 Adults, Conducted March 14-15, 2020
Harris National Survey of 2,016 Adults, Conducted March 28-30, 2020

The Coronavirus outbreak has (expectedly) had a negative impact on mental health across the country...

Do you feel that worry or stress related to coronavirus has had a negative impact on your mental health, or not?

	Early March 2020	Late March 2020
Total Yes	32%	45%
Yes – Major Impact	14%	19%
Yes – Minor Impact	18%	26%
No	67%	54%

...but while the country is experiencing a lot of uncertain/negative emotions, there is also a sense of optimism/confidence in nearly 9 in 10 Americans.

I'm going to mention some words that might describe your state of mind as the world deals with COVID-19, the coronavirus. For each, please tell me if this does or does not describe your state of mind a lot of the time—just answer yes or no.

Negative State of Mind	% Yes
Stressed	55%
Boxed in	42%
Scared	39%
Confused	34%
Angry	31%
Lonely	21%
Panicked	18%
Feeling doomed	15%

Positive State of Mind	% Yes
Confident Americans will get through this and be OK	88%
Calm	72%
Unconcerned	22%

Americans are divided on whether a return to normal will take more or less than 6 months.

How long will it take before things return to the way they were before coronavirus started to spread?

	March 24-26
Less than a month	3%
1 to 3 months	19%
3 to 6 months	26%
6 months or less	48%

6 months +	52%
6-12 months	27%
1-2 years	17%
More than 2 years	8%

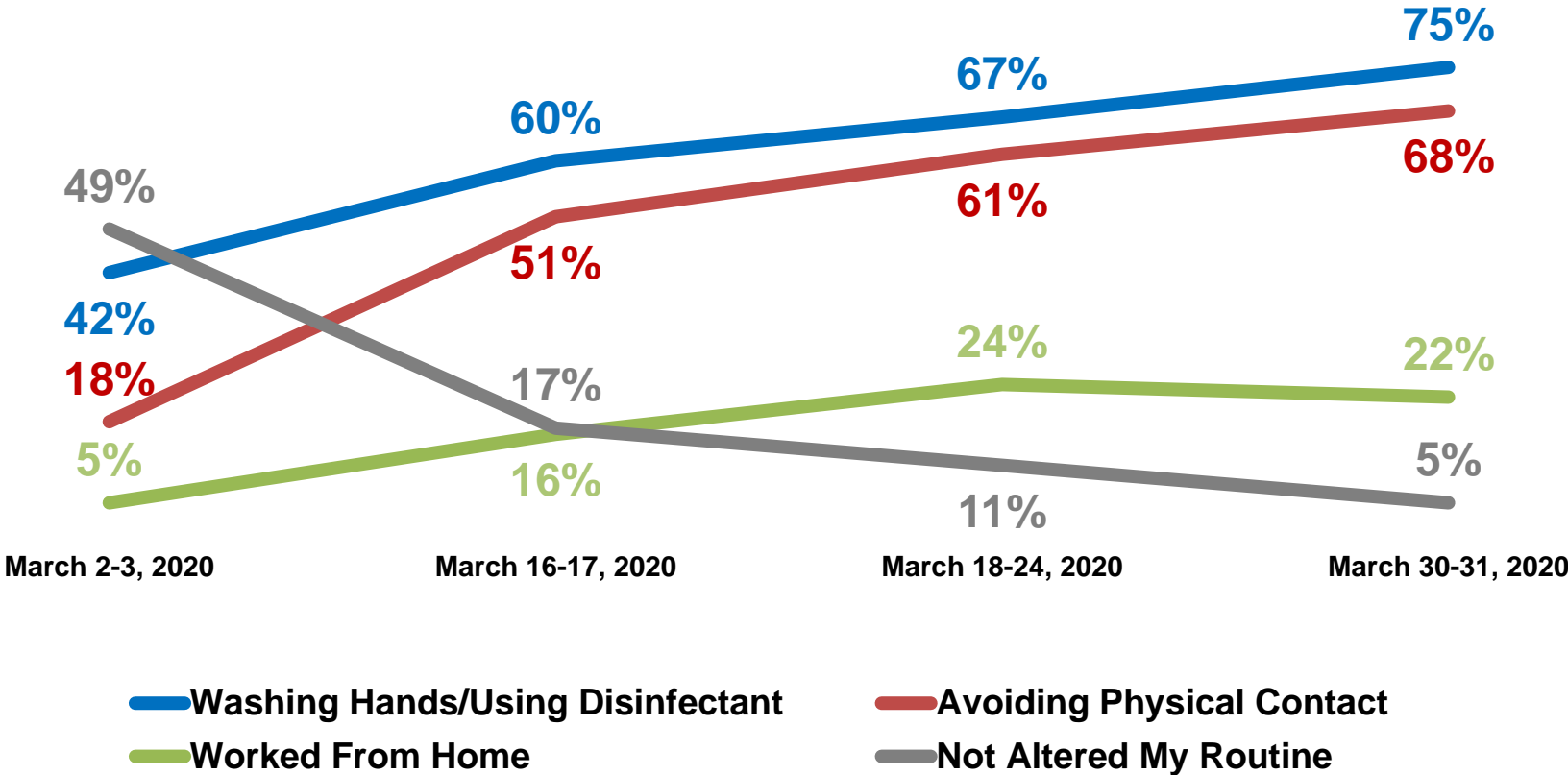


Impact On Everyday Life

Americans have changed their behaviors in rapid fashion.



Have you changed your daily routine in any way specifically because of the coronavirus/COVID-19?



Most Americans are now reporting they are practicing social distancing.

There are some things people may do because of their concern about the coronavirus. For each one of the following, please indicate if this is something you have done, are considering doing or have not considered.

<i>% Have Done</i>	Avoided Crowds	Avoided mass transit / air travel	Avoided small gatherings	Avoided public places
March 13-15	59%	55%	23%	30%
March 16-19	79%	75%	46%	54%
March 20-22	92%	87%	68%	72%
March 23-26	--	90%	78%	77%
March 27-29	--	89%	83%	78%

Life for most Americans has drastically changed over the course of a few weeks.

Please tell me if you have taken any of the following actions because of the recent coronavirus outbreak. Have you (INSERT ITEM), or not? Have you (INSERT NEXT ITEM) because of the recent coronavirus outbreak, or not?

% Yes	Early March 2020	Late March 2020
Stayed home instead of going to work, school, or other regular activities	26%	75%
Decided not to travel or changed travel plans	42%	69%
Cancelled plans to attend large gatherings such as concerts or sporting events	40%	66%
Stocked up on items such as food, household supplies, or prescription medications	35%	60%

7 in 10 Americans are willing to stay home as long as asked, whether it is for their own safety or the safety of their community.

Some states have issued a stay-at-home order to residents except for essential services until further notice. **If asked to do so in order to stop the spread of coronavirus in your community**, how long do you think it would be reasonable for you to stay home without physical contact with people outside your home—a day or two, a week, two weeks, as long as is asked, or would you not be willing at all?

(Sample A)

	% Reasonable
A day or two	2%
A week	8%
Two weeks	13%
As long as asked	70%
Would not be willing at all	4%
Not Sure	2%

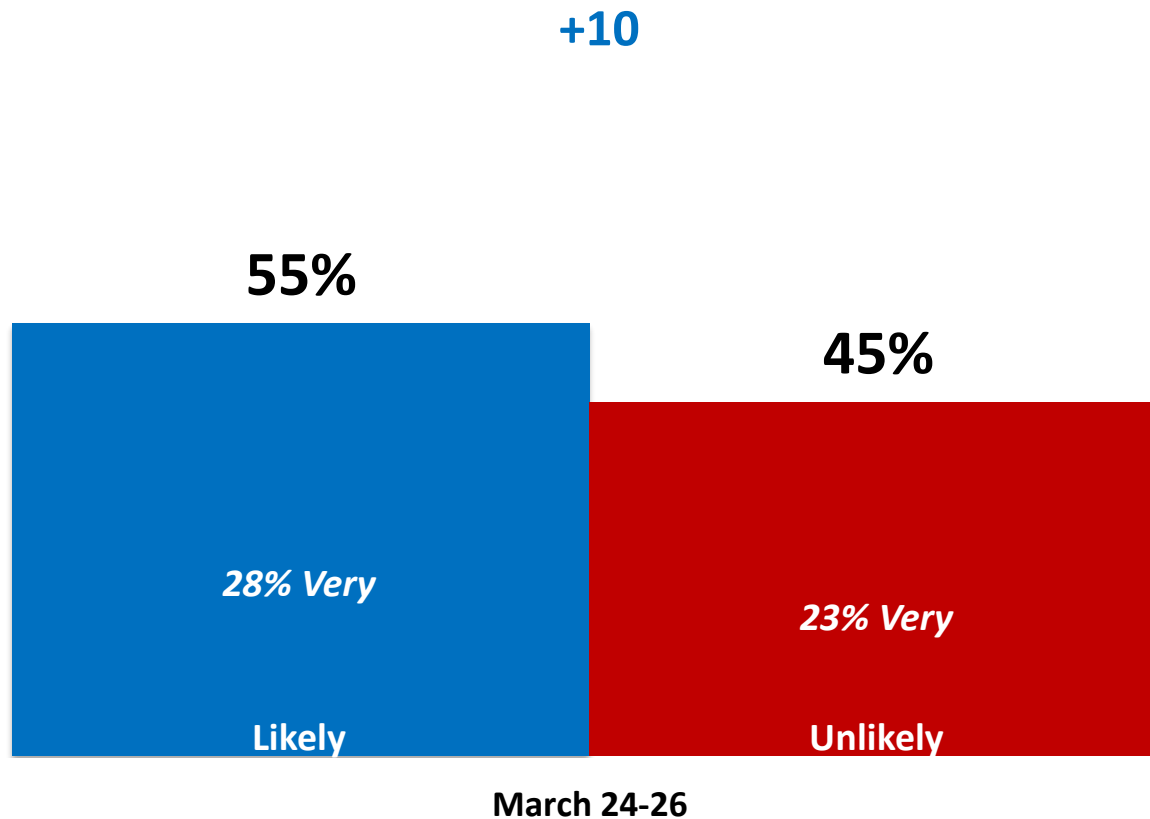
Some states have issued a stay-at-home order to residents except for essential services until further notice. **If asked to do so in order to keep you from contracting coronavirus**, how long do you think it would be reasonable for you to stay home without physical contact with people outside your home—a day or two, a week, two weeks, as long as is asked, or would you not be willing at all?

(Sample B)

	% Reasonable
A day or two	2%
A week	6%
Two weeks	15%
As long as asked	72%
Would not be willing at all	4%
Not Sure	2%

A majority of Americans say it is likely they will see a decrease in income because of COVID-19.

How likely or unlikely is it that the coronavirus pandemic will cause you to see a decrease in income, either through reduced hours or the loss of your job?



4 in 10 have lost income from a job or business, been laid off, or had hours reduced without pay. One-quarter have had difficulty getting prescriptions.

Have you (INSERT ITEM) because of the coronavirus, or not?

% Yes	Early March 2020	Late March 2020
Been unable to get groceries	19%	29%
Lost your job, been laid off, or had your hours reduced without pay	N/A	28%
Been unable to get cleaning supplies or hand sanitizer	42%	27%
Lost income from a job or business	9%	26%
Been unable to get prescription medication	4%	24%

Net
39% have lost income from a job or business, been laid off or had hours reduced without pay

Looking at the impact the Coronavirus is having on everyday life:

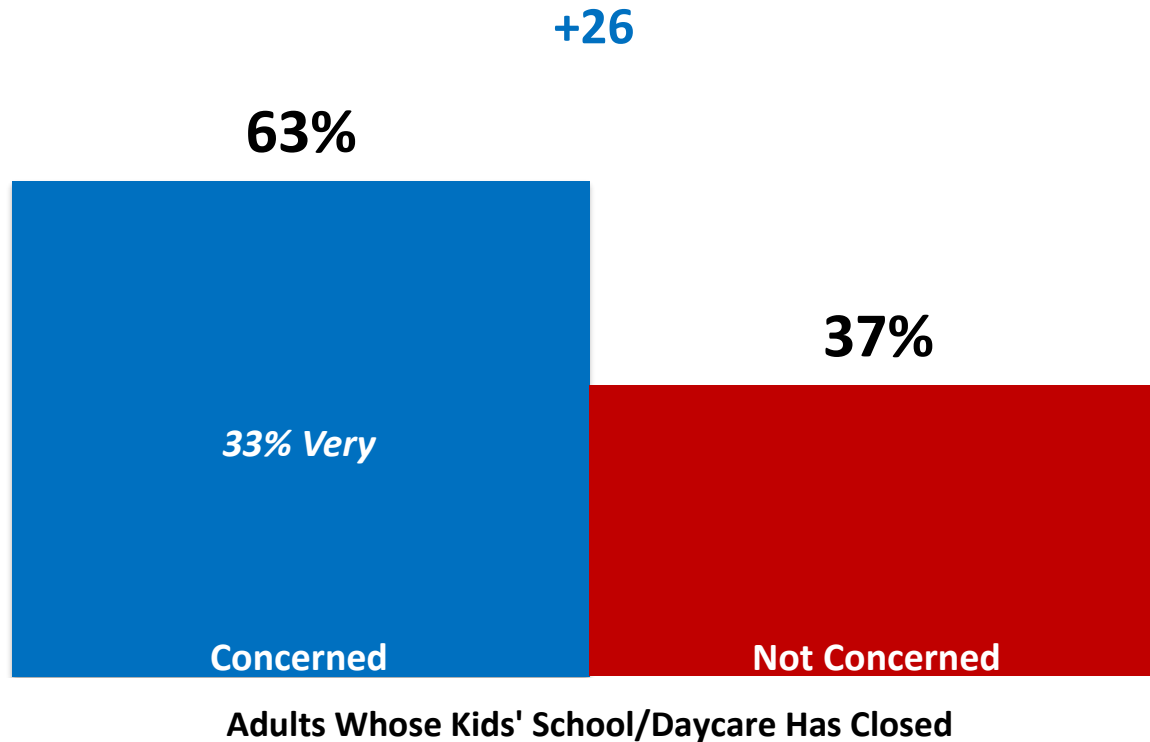
For each of the following, please tell me if this is something that has already happened because of the coronavirus, if you expect it to happen in the near future, or if you do not expect it to happen anytime soon.

<i>Ranked by % Already Happened/Expect Soon</i>	Already Happened	Expect Soon	Already Happened/Expect Soon	Do Not Expect Anytime Soon
Lost wages or other personal income	28%	16%	44%	50%
Lost what you considered a substantial amount you had in a retirement account	28%	12%	40%	50%
Become unable to pay a regular bill, such as rent or a mortgage or utility bill	9%	21%	30%	68%
Had difficulty getting needed medical care	10%	19%	29%	67%
Been laid off or furloughed from work	16%	12%	28%	62%
Difficulty getting basic services you rely on (meal services, public transportation, gov't benefits, etc.)	10%	15%	25%	70%
Have taken on additional childcare responsibilities	15%	5%	20%	72%
Gone hungry because of difficulty obtaining food	5%	10%	15%	82%

A majority of parents are worried about their child falling behind academically.

How concerned are you about your child falling behind academically?

(Asked among adults with children in a school/daycare that has closed)



There will be behavioral changes on the other side of the Coronavirus outbreak.

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?

	Go to the Office	Go out to Dinner	Greet People with a Handshake	Go to a Gym Class	Take Public Transportation	Host/Attend a Large Social Gathering	Go to the Movies	Stay in a Hotel	Go to a Sporting Event	Fly on a Plane	Visit a Casino	Take a Cruise
Immediately	21%	13%	9%	8%	7%	6%	6%	7%	6%	5%	5%	3%
1-30 Days	20%	28%	16%	16%	14%	15%	15%	11%	11%	10%	9%	5%
Within a month	41%	41%	25%	24%	21%	21%	21%	18%	17%	15%	14%	8%
2-3 Months	9%	25%	20%	13%	12%	20%	22%	19%	16%	14%	12%	7%
4-6 Months	7%	16%	15%	12%	11%	17%	17%	19%	16%	16%	13%	9%
2-6 Months	16%	41%	35%	25%	23%	37%	39%	38%	32%	30%	25%	16%
7-11 Months	4%	6%	8%	6%	7%	10%	8%	11%	9%	11%	7%	7%
A Year+	3%	6%	12%	8%	9%	12%	11%	16%	13%	18%	14%	21%
7 mos. - 1 Year	7%	12%	20%	14%	16%	22%	19%	27%	22%	29%	21%	28%
Never Again	2%	1%	12%	4%	6%	4%	3%	3%	4%	4%	5%	13%

COVID-19 Outbreak = Opinions About Privacy Are Out The Window.

Would you support or oppose a required health screening before someone could be allowed to enter certain crowded public spaces (e.g., airports, beaches)?

84%

Require People To Have Health Screens To Enter Crowded Public Spaces -- Airports/Beaches

% Support

Once they are allowed to reopen, should certain businesses that host events (e.g., concert venues, convention centers) be required to conduct health screening before allowing people to enter?

77%

Require Concert Venues To Conduct Health Screens Before Entry

% Yes

Would you be willing to share your mobile location data so that you can be alerted if you were to enter an area that posed a health risk (e.g., a quarantined zone or an area with several cases of COVID-19)?

71%

Willing To Share GPS Location Data To Be Alerted To Health Risks

% Willing

Would you support or oppose a registry that would allow you to see if any of your neighbors were diagnosed with COVID-19?

65%

National Registry Of People With COVID-19

% Support

Would you support or oppose governments and public health officials having access to anonymous mobile location data so they can monitor which areas are practicing social distancing?

60%

Give Gov't Access To GPS Data To Track Social Distancing

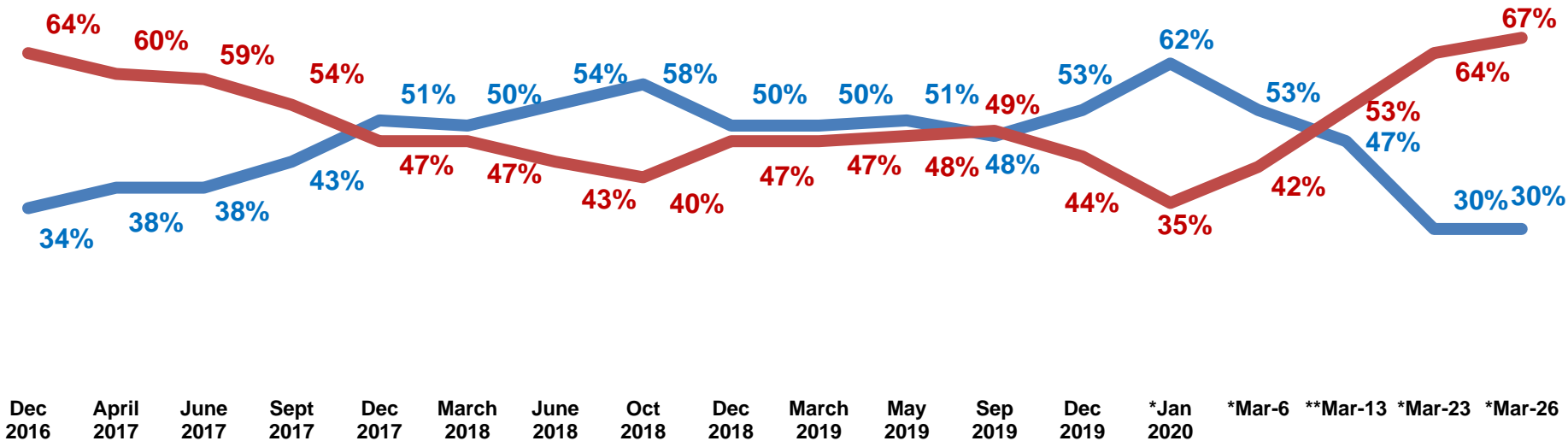
% Support



Coronavirus Financial/ Economic Impact

Americans' perceptions about the current state of the economy have drastically shifted and completely reversed since January 2020.

How would you rate the current state of the economy? Would you say it is excellent, good, (only fair/not so good), or poor?



— Excellent/Good — Fair/Poor

2016-2019 Data from CNBC All-America Economic Survey
 * Data from Global Strategy Group Navigator

COVID-19 is the largest and quickest drop in economic confidence we have seen during crises experienced in the past two decades.

How would you rate the current state of the economy? Would you say it is excellent, good, (only fair/not so good), or poor?

**% Excellent/Good
Prior to Event**

**% Excellent/Good
Soon After Event**

Drop in Confidence

9/11 Terrorist Attacks



32%

(9/10/01)*

*from Gallup

28%

(2/06/02)*

-4 points

in 5 months

08' Financial Crash



26%

(12/10/07)**

** From CNBC All-America Economic Survey

7%

(6/21/08)**

-19 points

in 6 months

COVID-19



53%

(3/6/20)^

^from Global Strategy Group Navigator Daily Tracker

30%

(3/23/20)^

-23 points

in **17 days**

8 in 10 Americans believe that the U.S. should take measures to slow the spread, even if it means many businesses have to stay closed.

Which comes closer to your view?

The U.S. should take measures aimed at slowing the spread of the coronavirus while more widespread testing becomes available, even if that means many businesses will have to stay closed

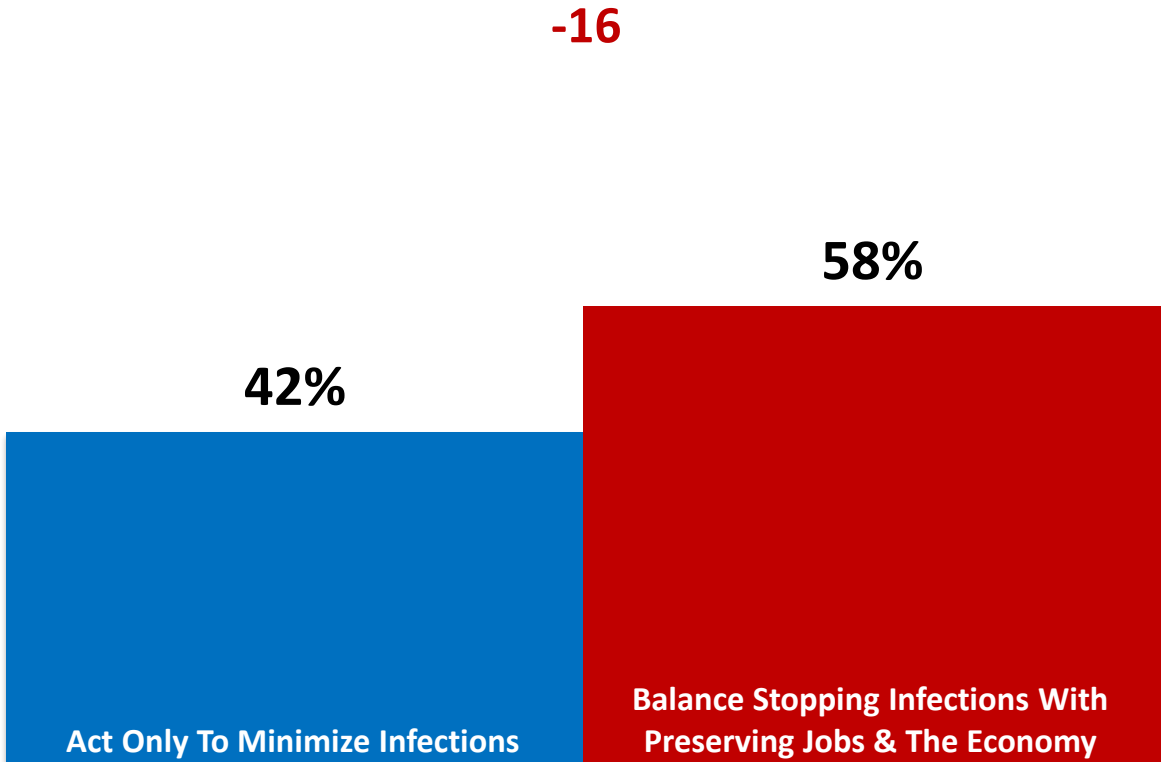
80%

The U.S. should ease up on measures aimed at slowing the spread of the coronavirus soon, in order to open businesses and get the U.S. economy going again, even if that means more people would get coronavirus and could die

14%

But, a majority of Americans also believe that we need to find a balanced approach to stopping infections while also preserving jobs and the economy.

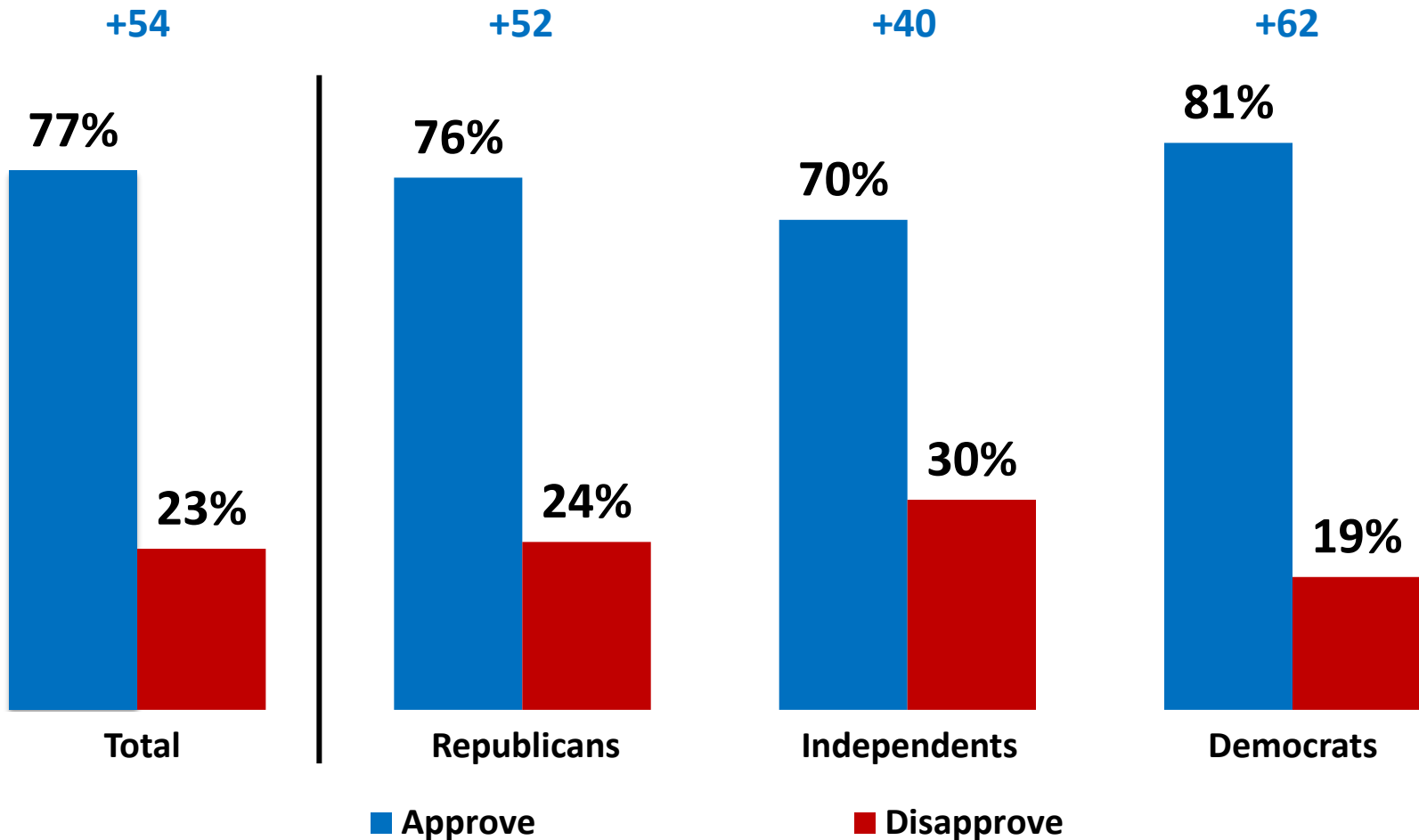
When dealing with coronavirus, do you think that we should act based only on what promotes fewer infections or do we need to balance stopping infections with needing to preserve jobs and the economy?



March 24-26

Americans overwhelmingly support the CARES Act.

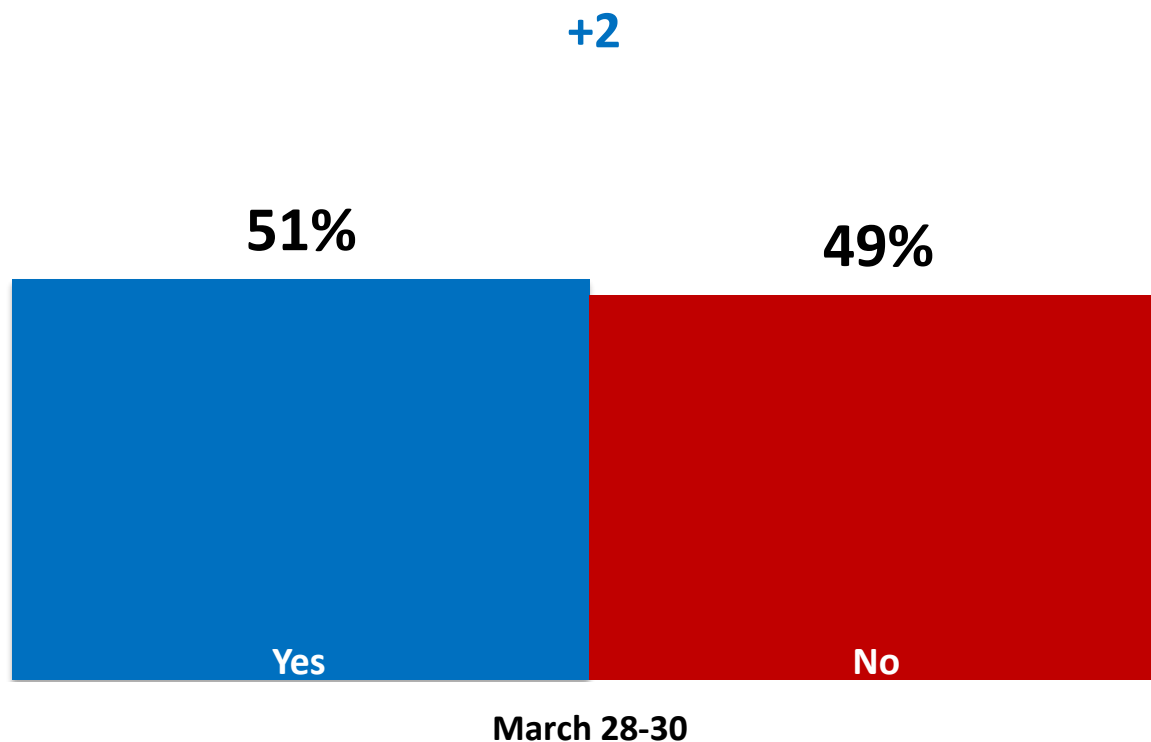
Do you approve or disapprove of the legislation Congress passed and President Trump signed into law on Friday authorizing \$2 trillion in spending to address the economic effects of the coronavirus situation in this country?



But they are divided about whether it will shorten the recovery period.

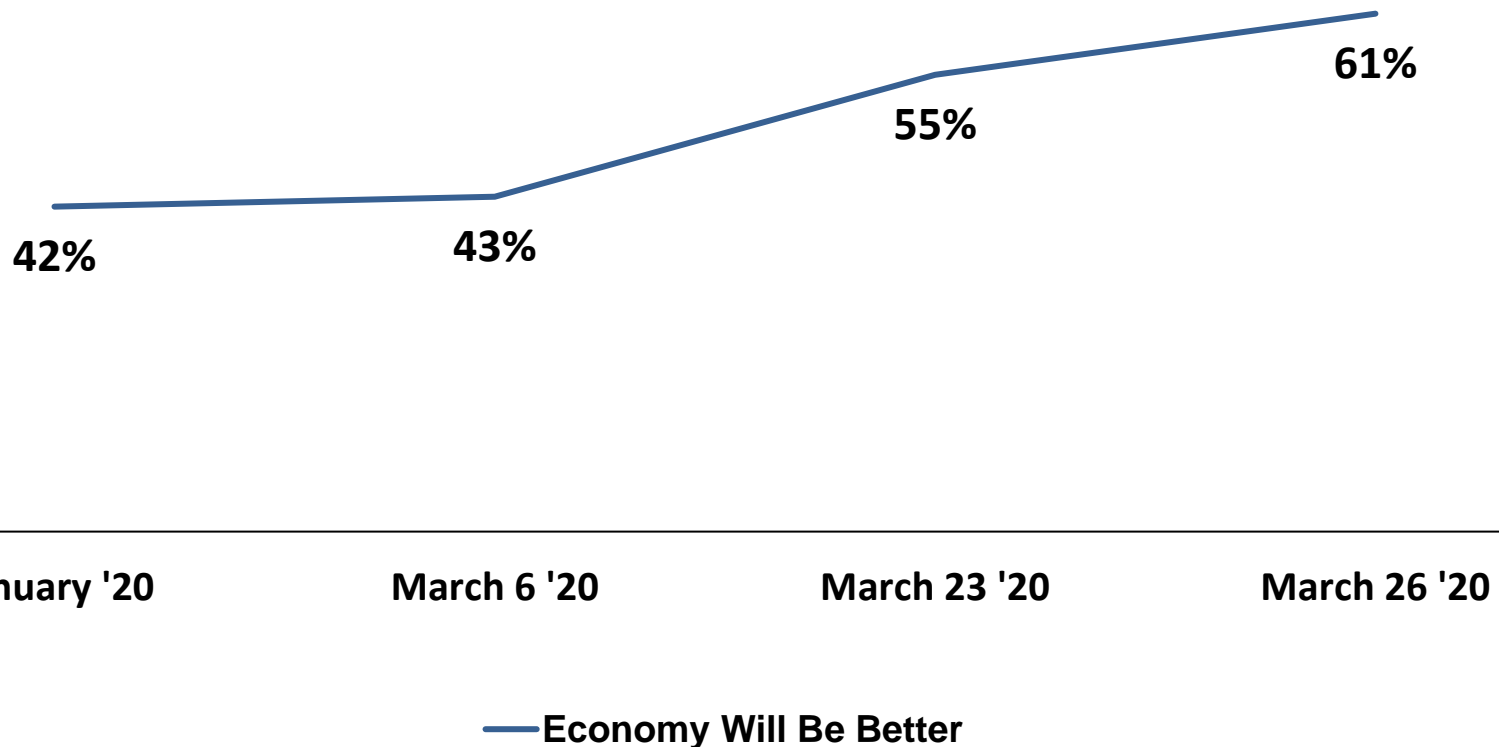


Do you think the economic stimulus will shorten the time it takes for the US economy to recover?



There is some good news...confidence is not gone, it has just shifted to the future – 61% of voters say the economy will be better in a year.

A year from now, do you expect the state of the U.S. economy to be better than it is today, the same as it is today, or worse than it is today?



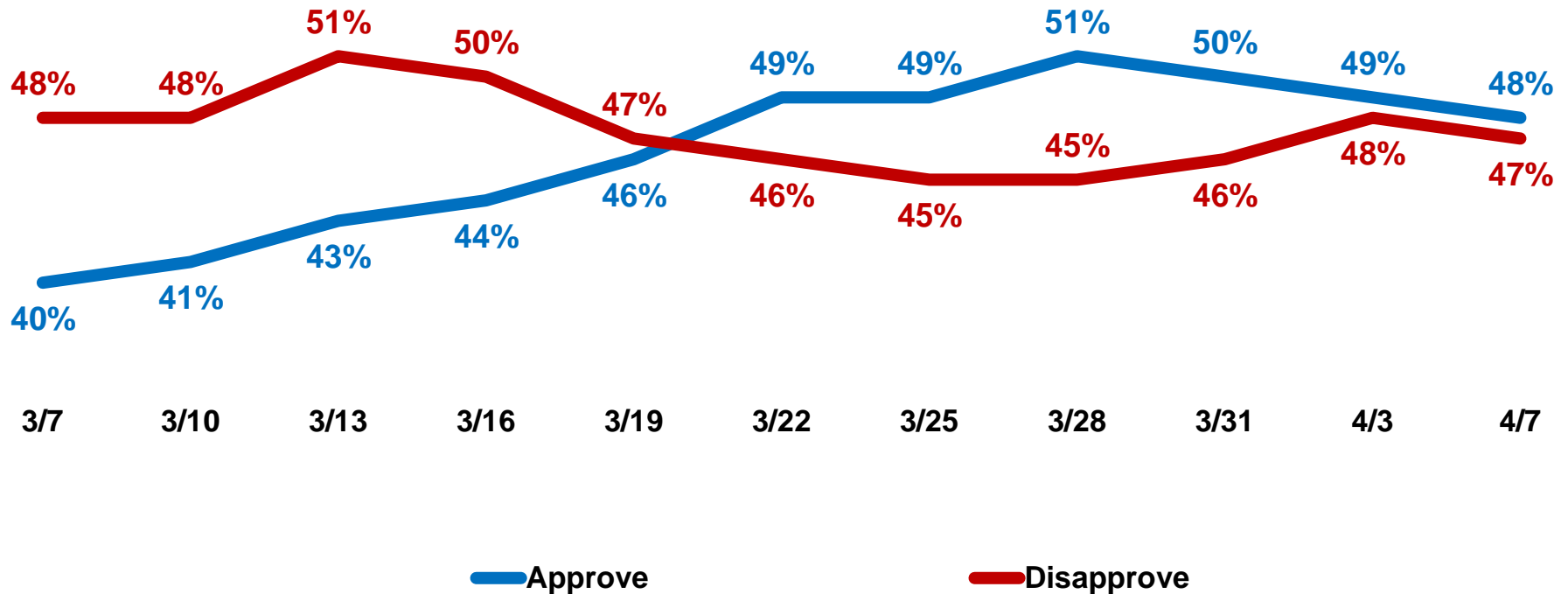


Government Response / Political Impact

Public Approval of President Trump's Handling of the Coronavirus.

President Trump Overall Job Approval (RealClearPolitics, April 7): 47%

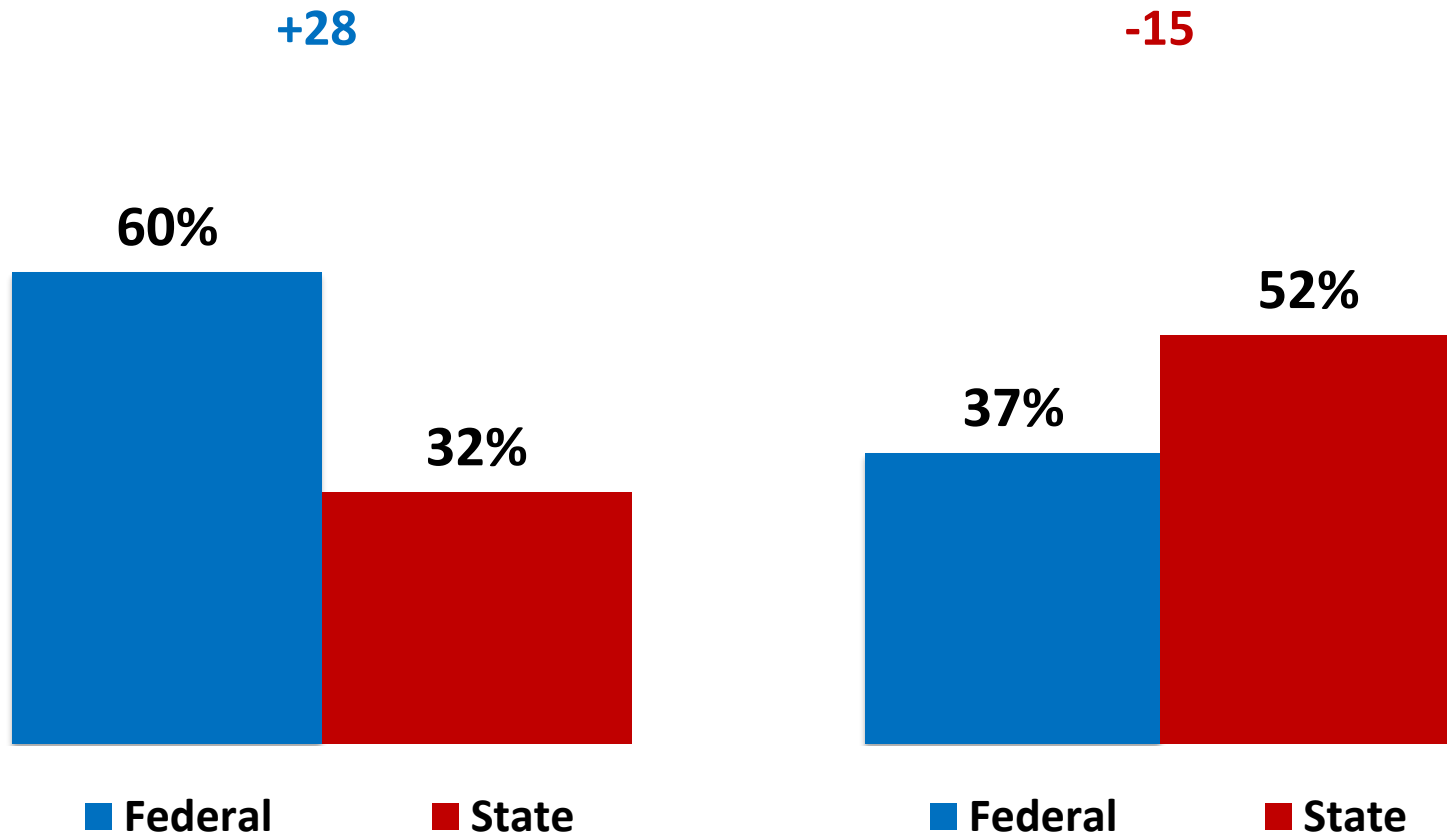
Approval of President Trump's Handling of the Coronavirus



While a majority of Americans believe the federal government *should* be leading the response, most believe their state government actually is.

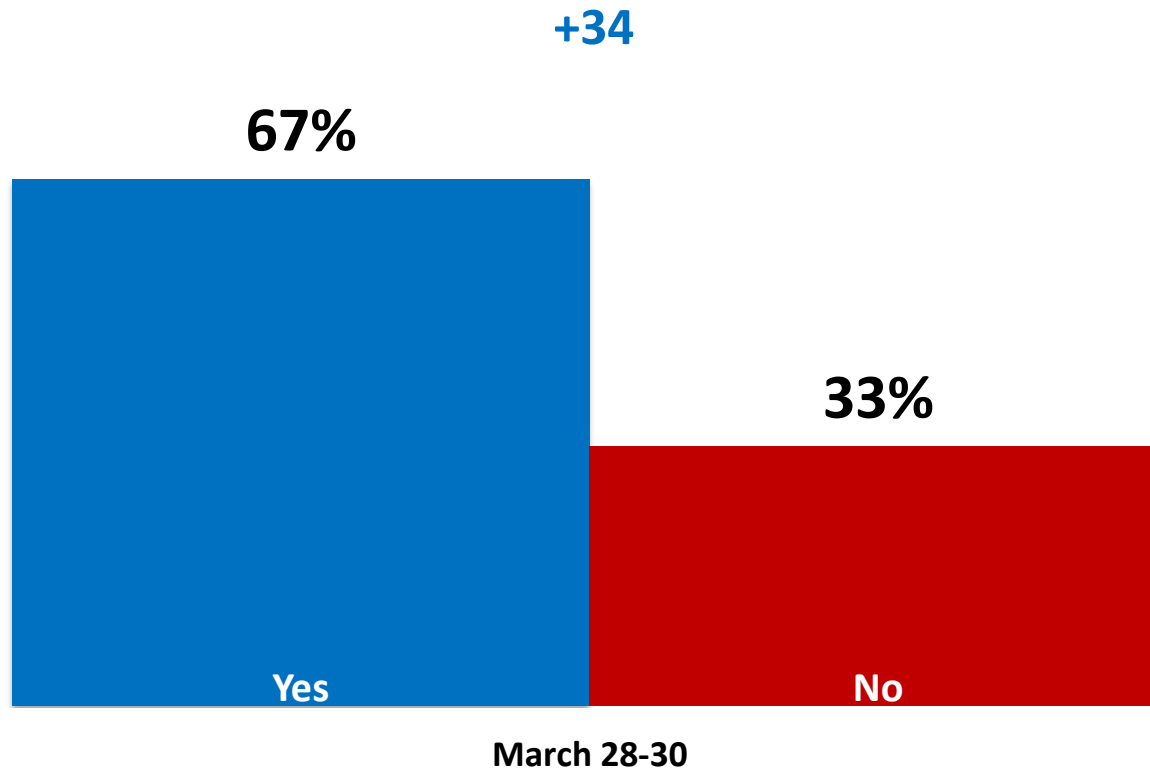
Who do you think **should be** primarily responsible for the response to the coronavirus outbreak? Is it the federal government or your state government?

Who do you think **is** currently leading the response for the current coronavirus outbreak in your area? Is it the federal government or your state government?



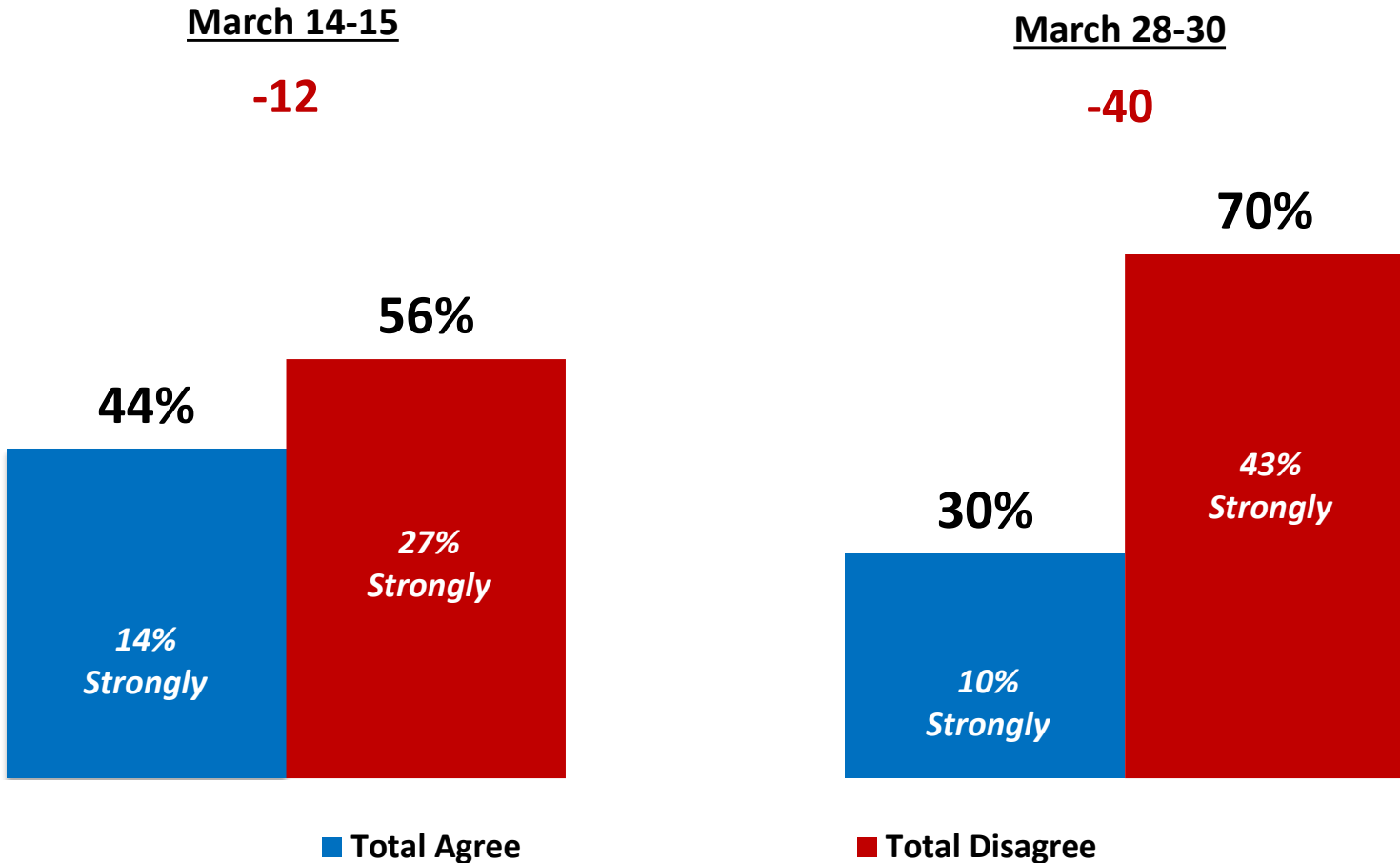
Two-thirds of Americans believe states are being forced to compete against each other for resources.

Do you believe states are being forced to compete against each other to acquire limited resources (e.g. ventilators, COVID-19 test kits)?



As we have gotten further into it, fewer Americans believe we were prepared for the outbreak.

How much do you agree or disagree with the following statement?
"The United States Government was adequately prepared for the coronavirus outbreak."



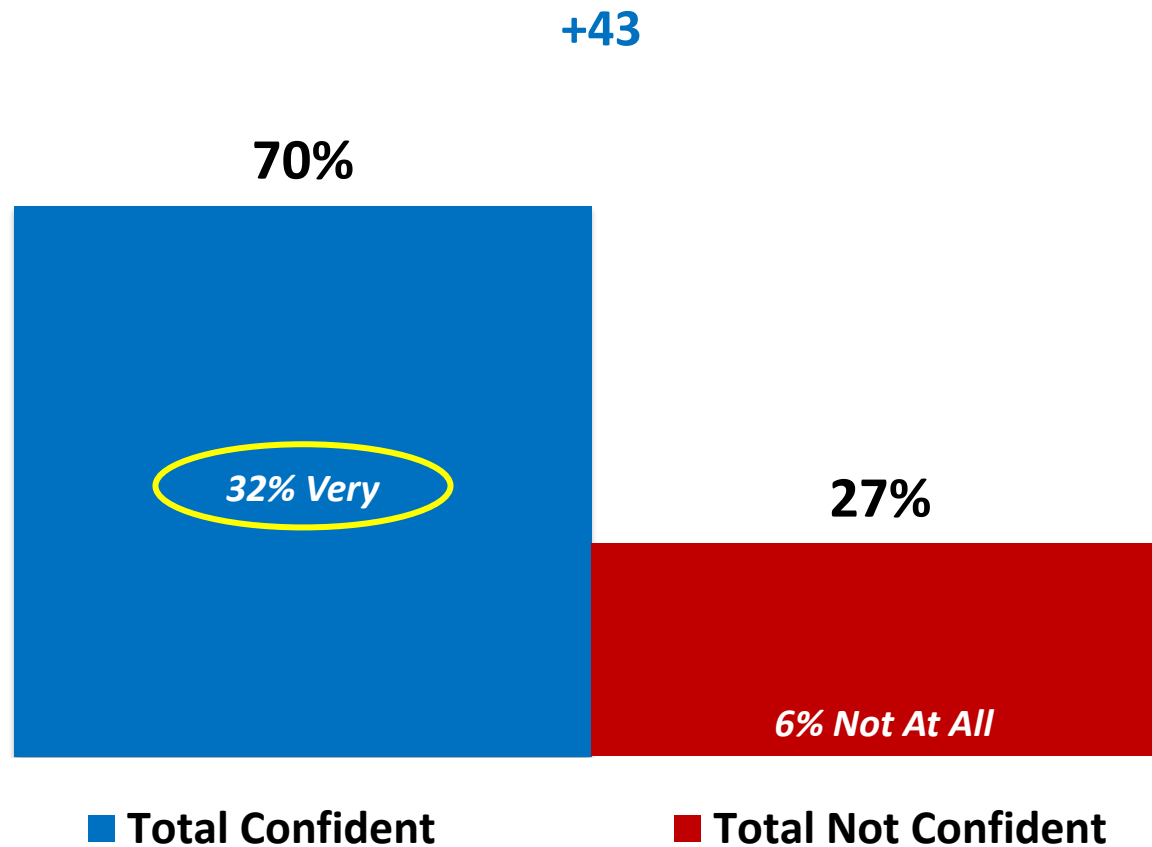
Americans overwhelmingly approve of the job hospitals and doctors are doing in handling the response to the Coronavirus.

How are each of the following people or entities handling their response to the spread of the coronavirus in the US?

<i>Ranked by % Excellent/Good</i>	Excellent/ Good	Fair/ Poor
Your local hospitals and doctors	84%	16%
The CDC	76%	24%
Your State Government	67%	33%
Your Local Government	66%	34%
Large Corporations	53%	47%
Federal Government	46%	52%
President Trump	44%	56%
Nancy Pelosi	37%	63%

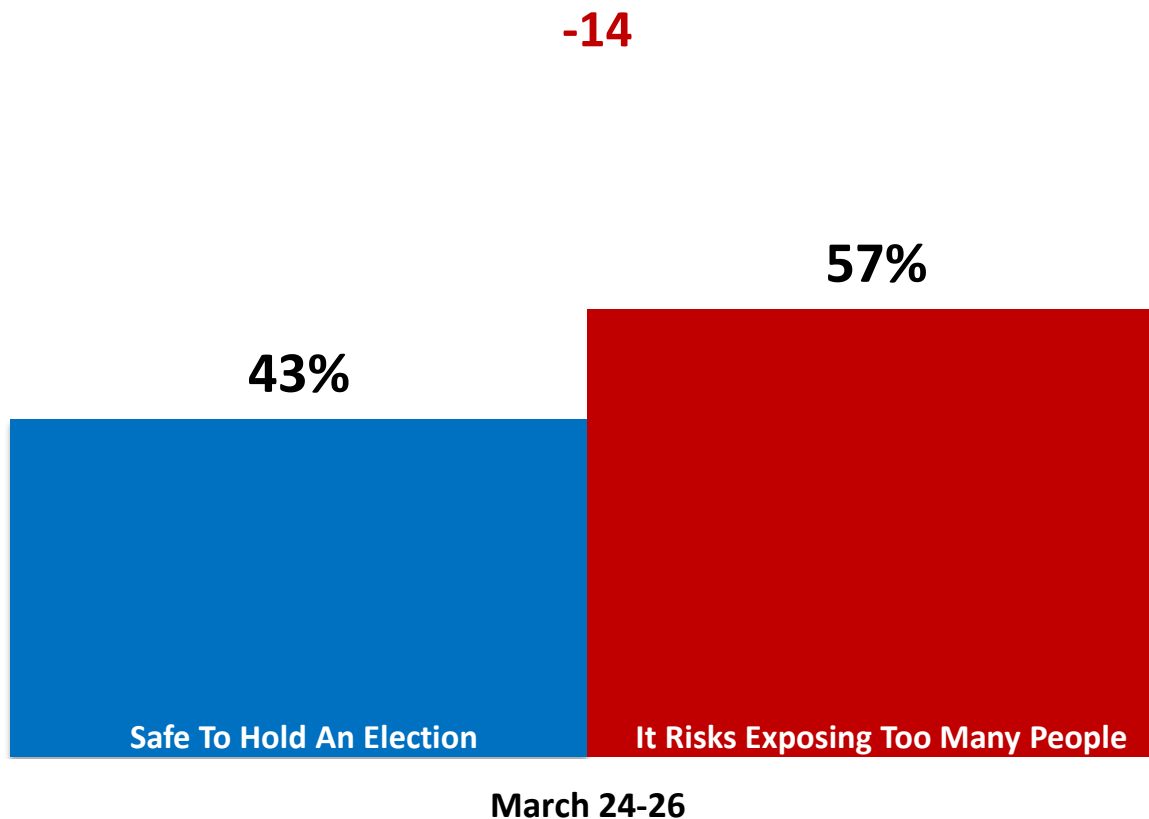
7 in 10 Americans believe the November election will proceed on time as planned, although overall confidence is soft...

How confident are you that the November general election will proceed on time, as planned—are you very confident, somewhat confident, not too confident, or not at all confident?



..but, a majority of Americans believe holding an election during the Coronavirus outbreak risks exposing too many people. If there is a Fall outbreak & no vaccine or mitigating drug/therapy, expect this to become widely debated.

Do you think it is safe to hold an election during the coronavirus outbreak or do you think that it risks exposing too many people?

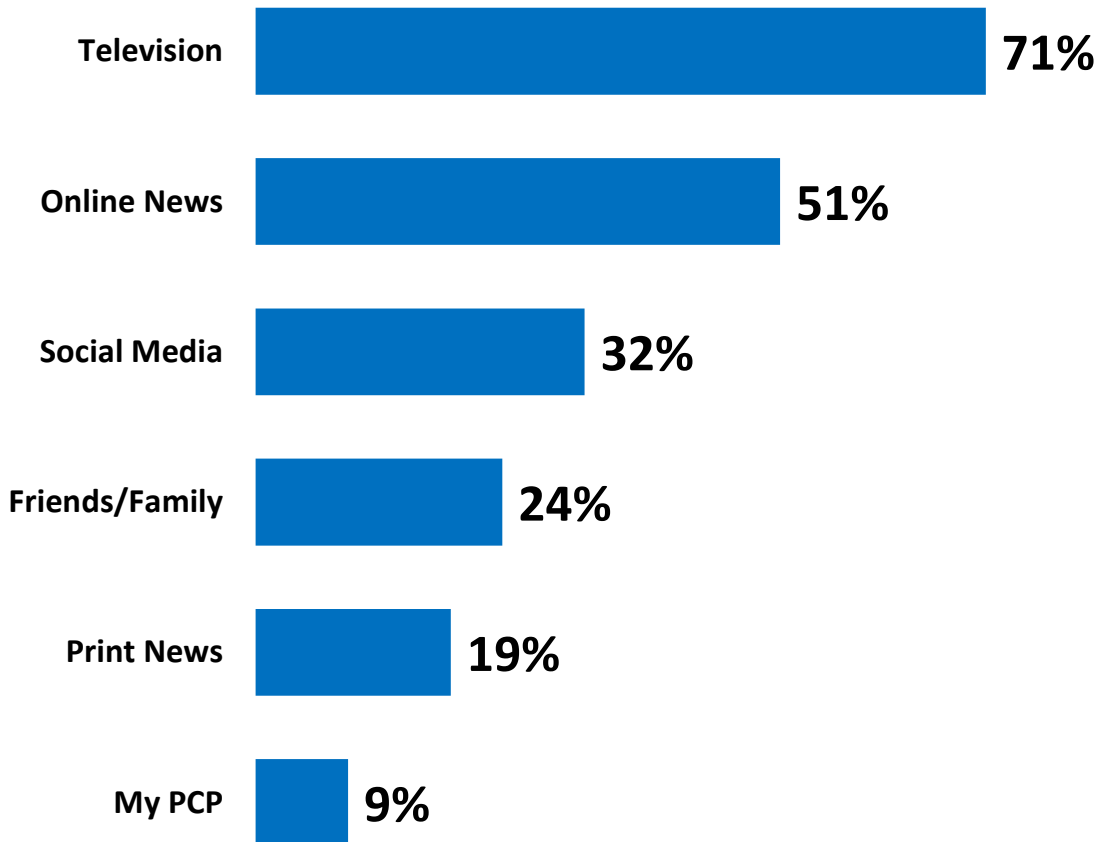




Trusted Sources Of Information

Primary News Source for Coronavirus:

What is your primary source of news about the coronavirus pandemic?

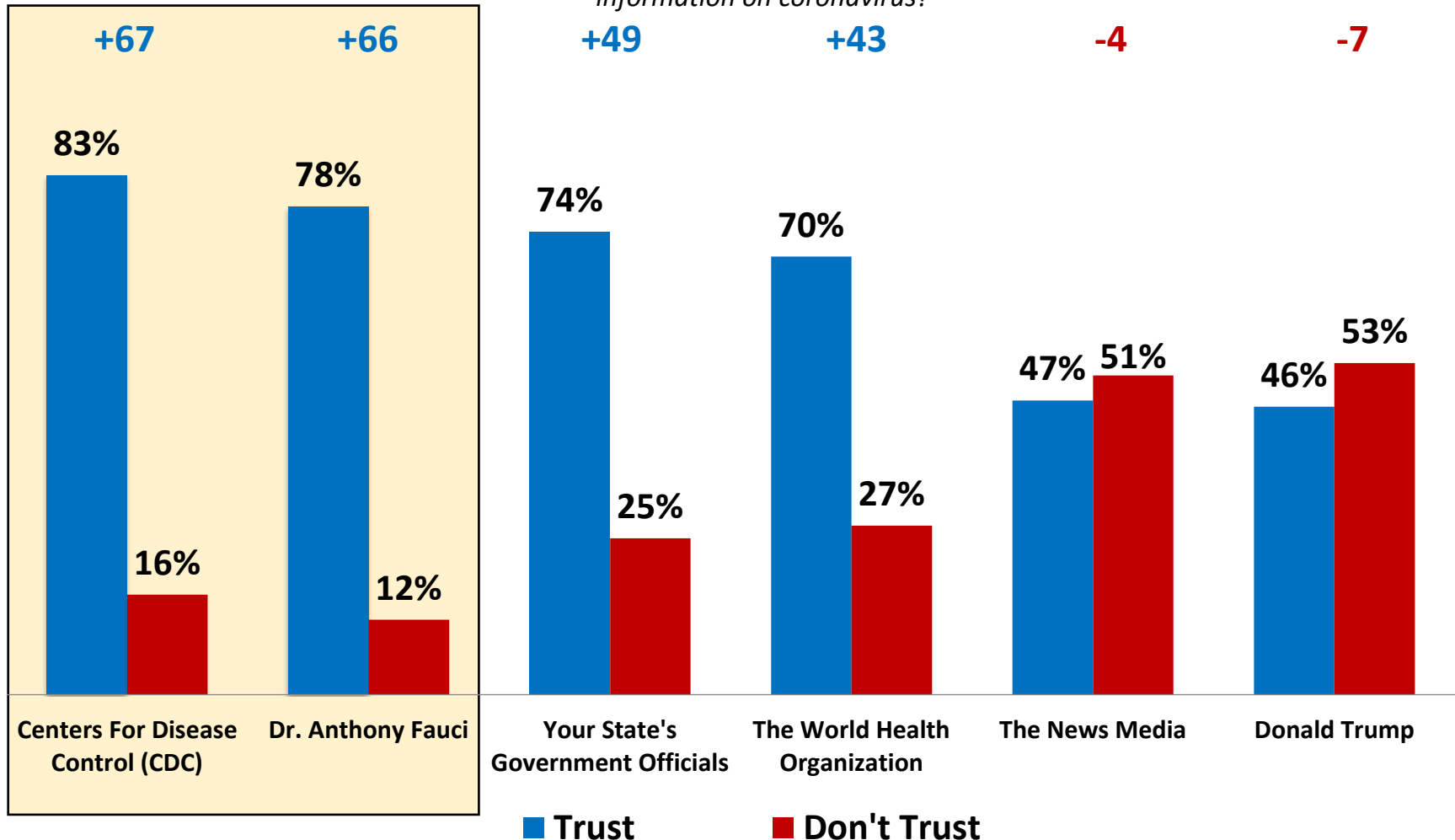


What is your go-to source of news about the coronavirus pandemic?

	Total
Local TV News	21%
Fox News	14%
CNN	13%
CDC.GOV	9%
Google	7%
Other Online Sources	4%
Other Broadcast News	4%
Facebook	4%
New York Times	3%
Other	3%
Local newspaper	2%
Instagram	2%

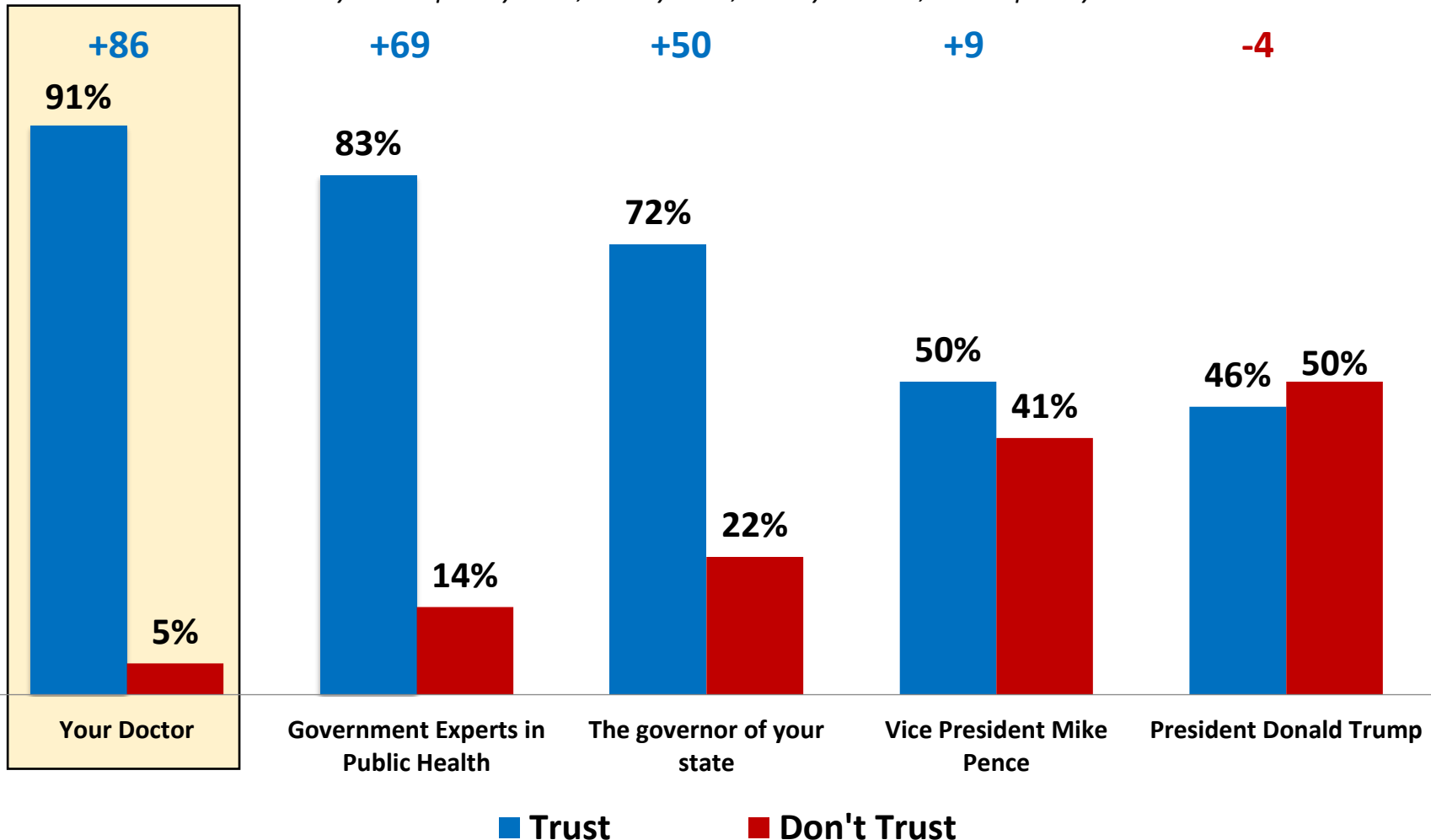
Americans trust the CDC & Dr. Fauci when it comes to information about the Coronavirus.

How much do you trust _____ to provide reliable information on coronavirus? How about _____? Do you trust (Him/Them) a great deal, a fair amount, not much or not at all to provide reliable information on coronavirus?



But Americans trust their own doctor for Coronavirus information more than anyone else.

I'm going to mention some sources with information that might help you understand what is happening with the new coronavirus that is affecting Americans. For each, please tell me if this is a source you completely trust, mostly trust, mostly distrust, or completely distrust.





Opinions Of The U.S. Healthcare System

Americans are looking for providers and the pharmaceutical industry to lead the way in providing solutions.

Which of the following industries do you think should provide solutions during the COVID-19 outbreak?

	March 28 – March 30
Healthcare (Doctors/Nurses/Hospitals)	62%
Pharmaceutical/Drugs	60%
Technology	42%
Manufacturing	32%
Retail—Grocery	30%
Financial Services	28%
Media	28%
Food & Beverage	27%
Travel and hospitality (hotels, cruise lines)	24%
Restaurants	22%
Airlines	21%
Non-Profits	20%
Retail	18%
Small Businesses	16%
Automotive	16%
Entertainment	15%

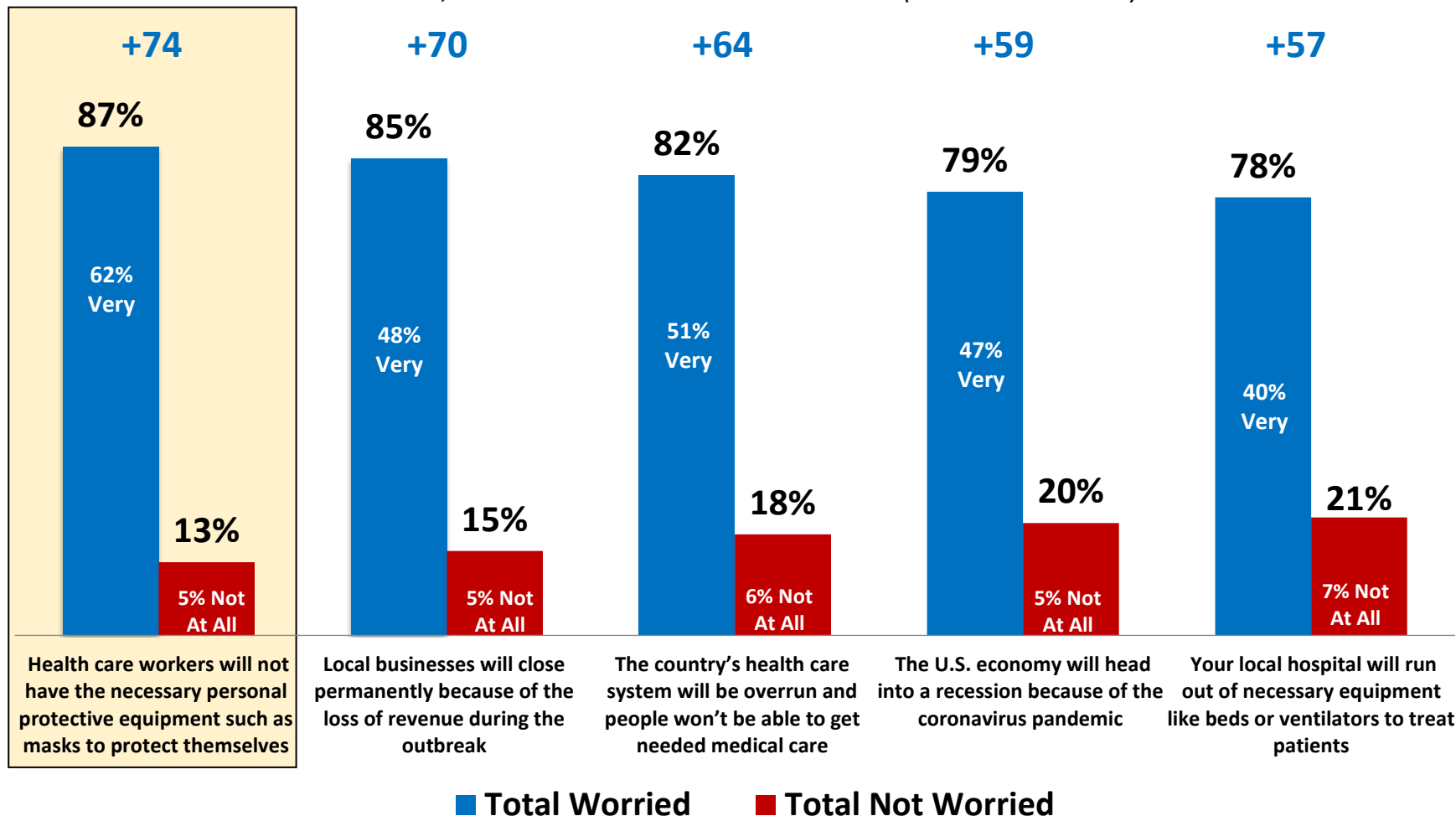
Americans already had a strong image of nurses/doctors/hospitals. They feel even stronger about them now.

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

<i>Ranked by D/S</i>	More Positive	More Negative	D/S	Unchanged
Healthcare (Doctors/Nurses/Hospitals)	62%	8%	+54	29%
Retail	48%	13%	+35	39%
Small Business	41%	12%	+29	47%
Pharmaceutical/Drugs	39%	13%	+26	48%
Food & Beverage	37%	12%	+25	50%
Restaurants	38%	15%	+23	47%
Non-Profits	33%	10%	+23	56%
Manufacturing	32%	13%	+19	55%
Oil	21%	12%	+9	68%
Entertainment	25%	17%	+8	59%
Real Estate	16%	13%	+3	71%
Travel and hospitality (hotels, cruise lines)	21%	25%	-4	54%
Airlines	18%	27%	-9	55%

Americans are most worried about the lack of personal protective equipment (PPE) for health care workers.

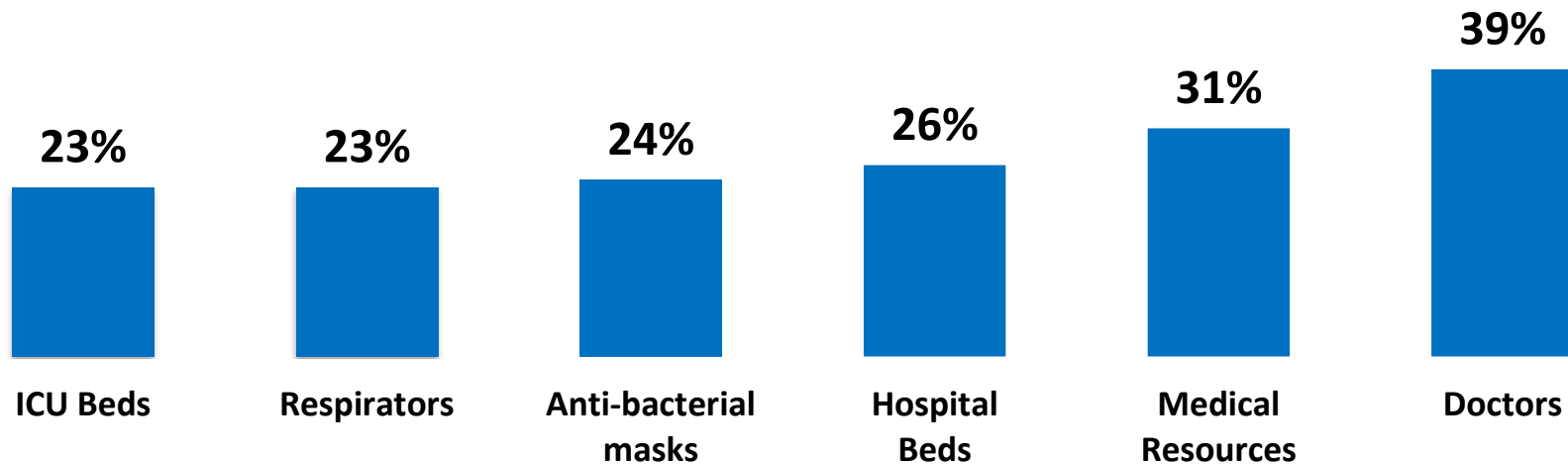
How worried, if at all, are you that (INSERT ITEM)? Are you very worried, somewhat worried, not too worried, or not at all worried? How about that (INSERT NEXT ITEM)



Americans are pessimistic about our nation's medical equipment and personnel supply.

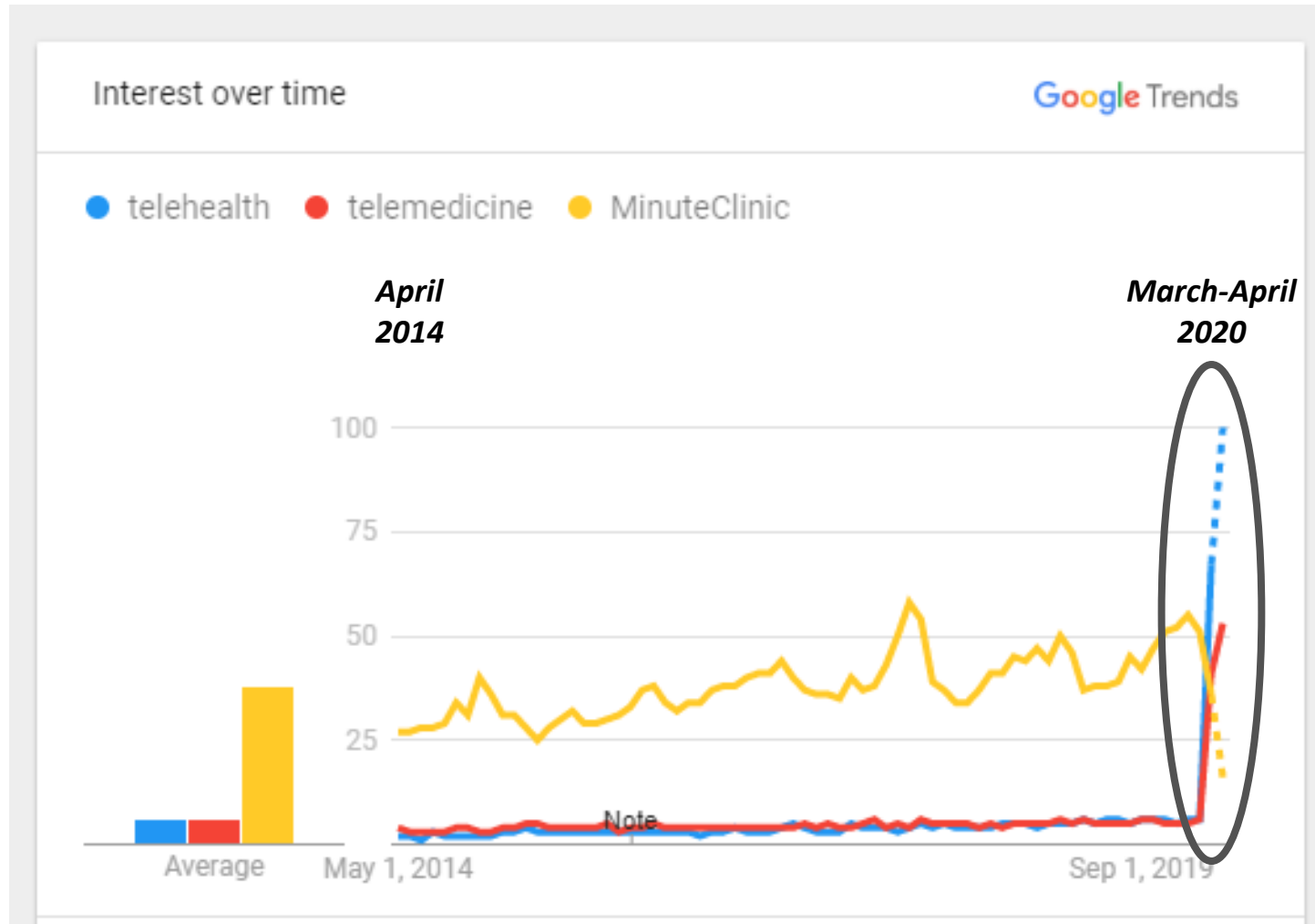
To the best of your knowledge, does the US have enough _____ to handle the spread of coronavirus?

% Yes Shown



There has been a huge spike in interest/searches for telemedicine & telehealth over the last 4 weeks.

Searches For "Telehealth," "Telemedicine" & "MinuteClinic"
(April 2014 – March/April 2020)



Source: Google Trends

And, the media is closely tracking the spike in interest in telemedicine.

THE WALL STREET JOURNAL.

BUSINESS | HEALTH CARE | HEALTH

Telemedicine, Once a Hard Sell, Can't Keep Up With Demand

The new coronavirus outbreak is testing the industry's capacity, sending companies scrambling for doctors and new services

By *Parmy Olson*

April 1, 2020 5:47 am ET



Telemedicine is having a moment. How can patients make use of the growing industry?

By *Lucien Bruggeman*

March 23, 2020, 3:59 AM • 10 min read



Telemedicine is essential amid the covid-19 crisis and after it

MAR 31ST 2020



The Coronavirus Outbreak Could Finally Make Telemedicine Mainstream in the U.S.

BY *JAMIE DUCHARME* MARCH 3, 2020



People are using their phones to see a doctor. How does it work?

March 19, 2020, 4:07 PM EDT

By *Vivian Manning-Schaffel*

The New York Times

Telemedicine Emerges as Care Option During COVID-19 Outbreak

March 21, 2020



The doctor will see you now...in your living room

By *Paul R. La Monica, CNN Business*

Updated 2:57 PM ET, Wed April 1, 2020

The Boston Globe

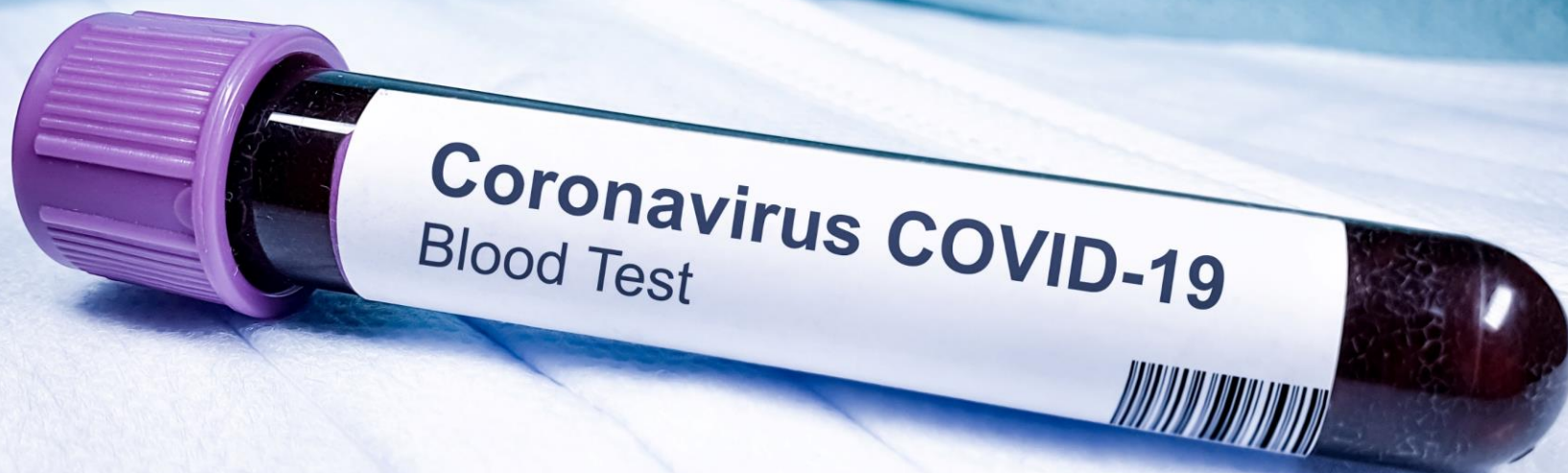
Coronavirus should be a testing ground for telemedicine's potential

Updated March 29, 2020, 4:00 a.m.



PUBLIC OPINION
STRATEGIES

turning questions into answers



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