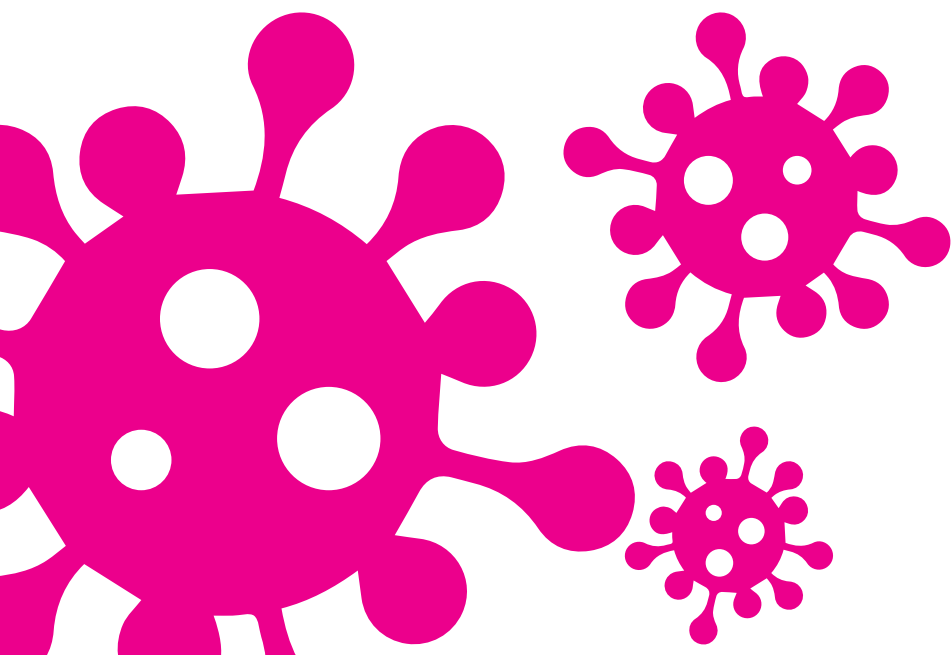


FROM DAY ONE TO DAY 60 AND BEYOND:

HOW COVID-19 HAS CHANGED AMERICANS'
COMFORT LEVELS, BEHAVIORS AND OUTLOOKS



mower

>>> EXECUTIVE SUMMARY

Across the U.S., state and city officials have begun to ease COVID-19 restrictions even as cases continue to rise. But do Americans feel ready? Mower polled 1,000 U.S. adults to learn what activities they're most comfortable resuming on "Day One" and how long will it take for a majority to feel safe. For the purposes of this study, we defined Day One as the first day it is deemed safe to begin resuming normal activities and left it up to each respondent to decide what that would mean to them. For some, Day One will come when the virus is on the decline, for others when there is a vaccine, and some believe it is already safe. Among the other questions we asked: Who are the experts they trust most to say it's okay to start reopening? And how does their political affiliation affect that trust?

What people are most excited about and comfortable resuming on Day One

Americans most look forward to resuming their normal routines (55%); more than 40% are comfortable going back to work, grocery shopping regularly and visiting family and friends on Day One.

How their comfort levels increase by Day 30 and Day 60

While certain states have started to allow salons, restaurants and shopping centers to reopen, fewer than one in four Americans are inclined to patronize them right away. By Day 30, just under half would be comfortable enough to do so, and by Day 60, two out of three.

What they think about sports without spectators

A majority (62%) either believe it's the right call or at least understand the rationale; 20% say there's no point playing without fans.

How they feel about traveling

It will be Day 30 before half of Americans feel comfortable vacationing by car and Day 60 before half will fly in a plane. Only 42% would travel internationally by Day 60, and 22% say they have never or would never venture beyond the U.S.

How political affiliation affects their comfort levels, concerns and trust

Republicans are more concerned with COVID-19's impact on the economy (54%) while Democrats worry about the virus returning (59%). Democrats are significantly more likely than Republicans to trust the CDC.

Their financial concerns and behaviors

Americans worry more about the pandemic's impact on the economy (49%) than their personal finances (37%); 55% plan to budget and save more post-COVID-19.

Their likelihood to use telemedicine

The percentage of Americans who have tried telemedicine has more than doubled, with 17% using it for the first time during the pandemic.

How they feel about virtual learning

Post-pandemic, Americans think schools should only use online learning under special circumstances like severe flu or weather (38%); 12% say it's not an acceptable way to teach.

Their social media habits

49% of Americans expect their social media usage to stay the same post-pandemic while 25% will be ready for a break.

What COVID-19 behaviors they plan to maintain

Over four in 10 think better general hygiene and no handshaking should continue after the pandemic passes.



FROM APRIL 8-10, 2020

**MOWER RESEARCH CONDUCTED
AN ONLINE SURVEY AMONG
1,000 U.S. ADULTS.**

Responses were obtained using Dynata, a research panel provider. The margin of error is +/- 3.1%.

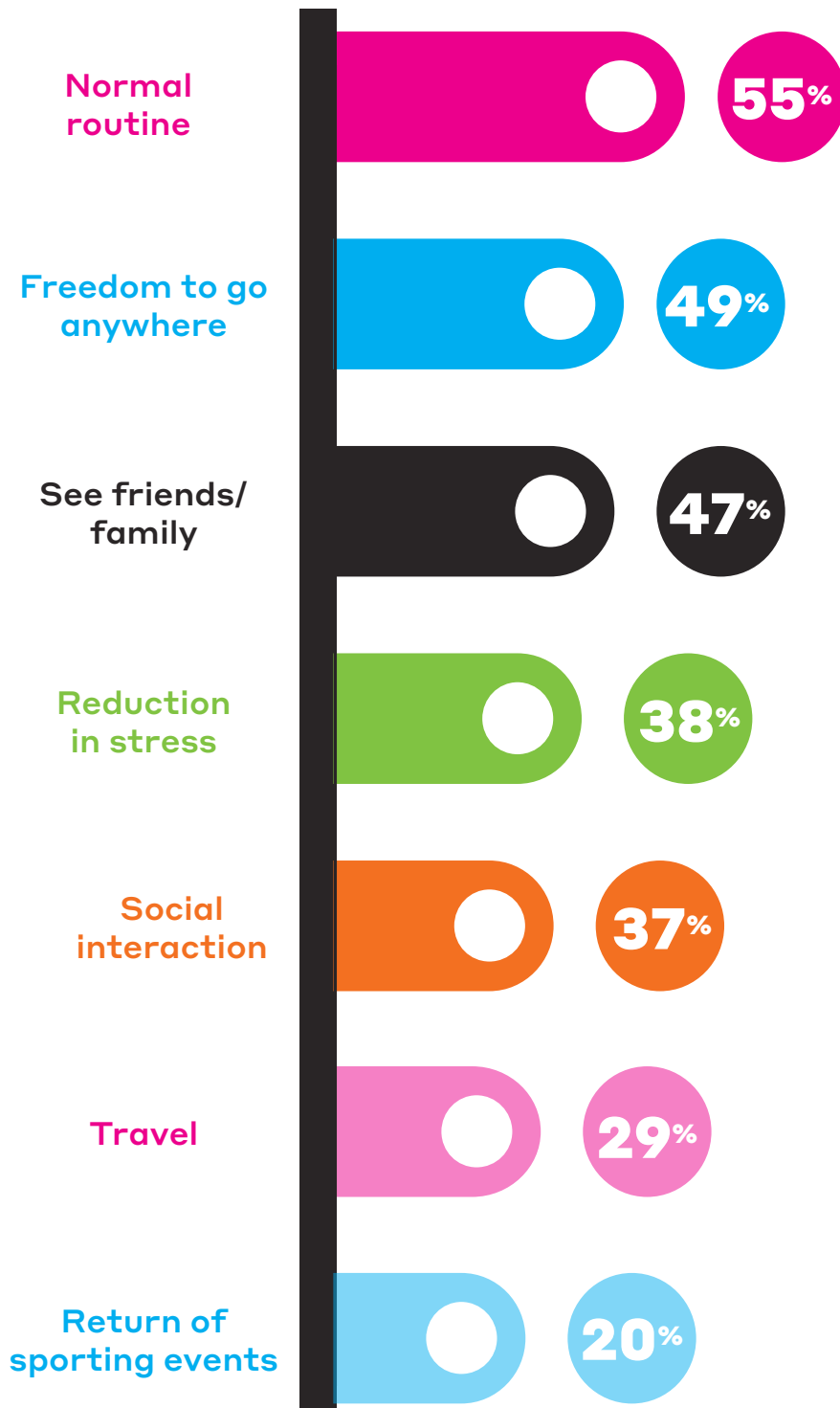
**THE OBJECTIVE
OF THIS RESEARCH
WAS TO UNDERSTAND
EXPERIENCES WITH THE
COVID-19 PANDEMIC, AND
HOW VARIOUS
BEHAVIORS WILL
BE IMPACTED BY
THE PANDEMIC.**

**ON DAY ONE
POST-COVID-19**



COMFORT
LEVELS ON
DAY ONE

MOST EXCITED ABOUT FOR DAY ONE





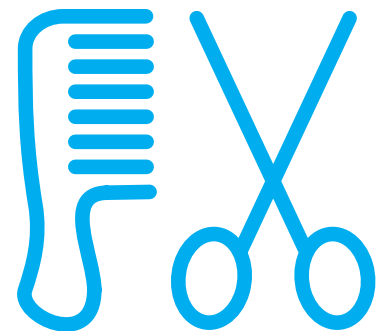
OVER A THIRD

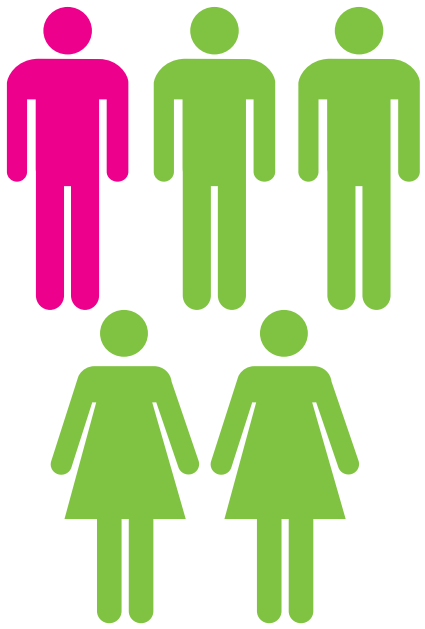
COMFORTABLE GOING TO
WORK • GROCERY SHOPPING •
VISITING FAMILY/FRIENDS •
DOCTOR/DENTIST VISITS

25%

COMFORTABLE

TAKING A **VACATION BY CAR** • GOING
TO A **PUBLIC PARK/BEACH** • VISITING
THE **SALON**





1 IN 5 ADULTS

COMFORTABLE GOING TO



A restaurant/
bar



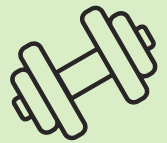
A mall/
shopping center



A worship
center



A privately owned
vacation rental



The gym



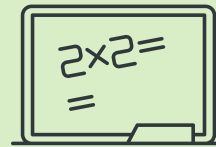
A hotel



A movie
theater



Visit
museum/
musical venue



Send kids back
to school



Fly on an
airplane

ON DAY ONE
POST-COVID-19

15%
OR FEWER

COMFORTABLE
GOING
TO A...

CASINO

sporting
event

spa












Traveling internationally

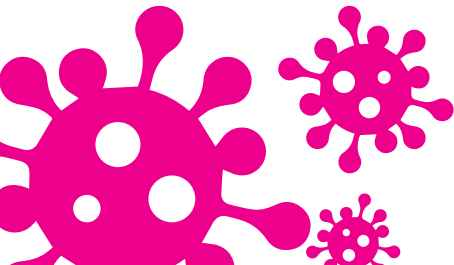
THEME PARK














DAY ONE/30/60:
WHERE DO ACTIVITIES
LAND ON THE
COMFORT METER?

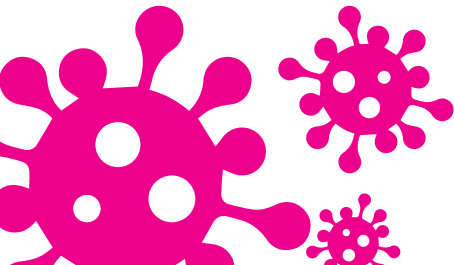
DAY ONE/30/60

| | DAY ONE | DAY 30 | DAY 60 |
|--|---------|--------|--------|
|  Go back to my regular work environment | 46% | 67% | 83% |
|  Resume a regular grocery shopping schedule | 44% | 68% | 83% |
|  Visit with friends/family | 42% | 65% | 82% |
|  Go to regular doctor/dentist appointment | 34% | 63% | 81% |
|  Take a vacation by car | 28% | 51% | 73% |
|  Go to a public park or beach | 26% | 52% | 72% |
|  Visit the beauty salon | 24% | 48% | 67% |
|  Go to a bar/restaurant | 22% | 49% | 70% |
|  Go to a mall/shopping center | 22% | 48% | 71% |
|  Go to a worship center | 22% | 43% | 60% |
|  Send my kids back to school | 21% | 45% | 63% |



DAY ONE/30/60

| | DAY ONE | DAY 30 | DAY 60 |
|---|---------|--------|--------|
|  Go to the gym | 19% | 39% | 58% |
|  Stay in a hotel | 18% | 40% | 65% |
|  Visit a museum, cultural or musical venue | 17% | 41% | 66% |
|  Go to a movie theater | 17% | 38% | 62% |
|  Stay in a privately owned vacation rental | 17% | 35% | 53% |
|  Fly on an airplane | 16% | 34% | 56% |
|  Go to a sporting event | 15% | 34% | 58% |
|  Go to a theme park | 15% | 32% | 55% |
|  Go to the spa | 14% | 31% | 51% |
|  Visit a casino | 14% | 29% | 49% |
|  Travel internationally | 12% | 23% | 42% |



WHAT DO ADULTS THINK ABOUT SPORTS RETURNING WITHOUT FANS?

I don't think sports should resume this season for safety reasons.

33%

I'd be bummed out, but I understand.

18%

It would be awful, there's no point in resuming the season without fans.

RETURN OF SPORTS

29%

It's the right call.

20%

Among adults who care about sports n=804

GO TO A SPORTING EVENT

Comfortable on **Day One**

15%

Comfortable by **Day 30**

34%

Comfortable by **Day 60**

58%

A person is shown from the waist down, crouching on a sandy beach. They are packing a suitcase with various items, including a white container and folded clothes. The person is wearing dark jeans and white sneakers with white laces. The entire image has a strong blue color overlay. The text is overlaid on the bottom right of the image.

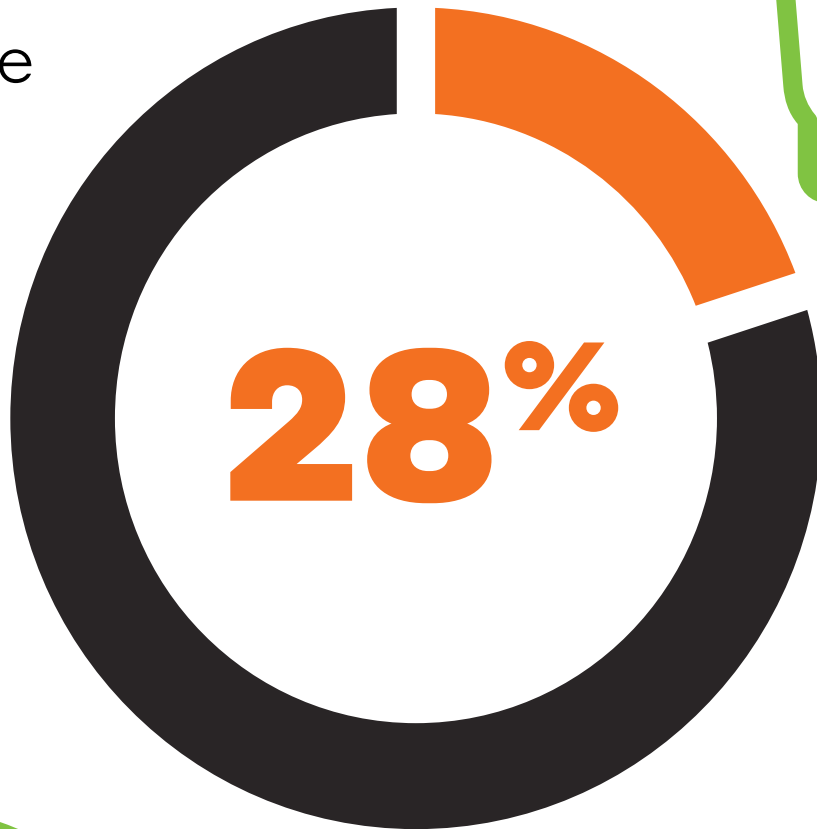
TRAVEL
WHEN WILL
AMERICANS
HIT THE ROAD?

**AMERICANS WILL BE
MORE INCLINED TO
TAKE THE WHEEL
THAN TAKE
TO THE SKIES.**

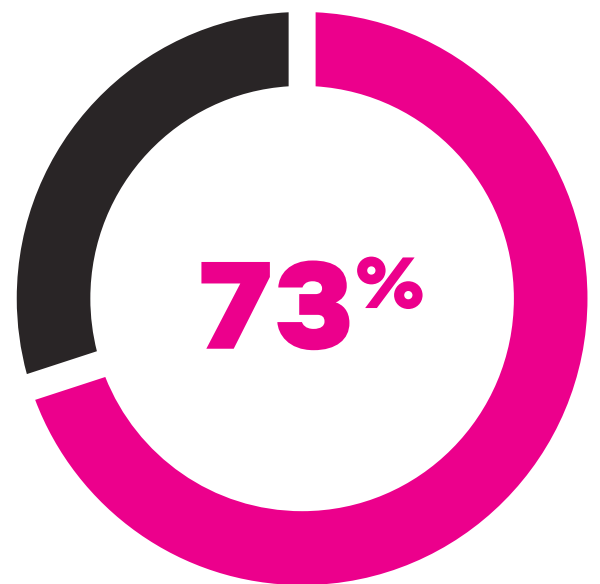
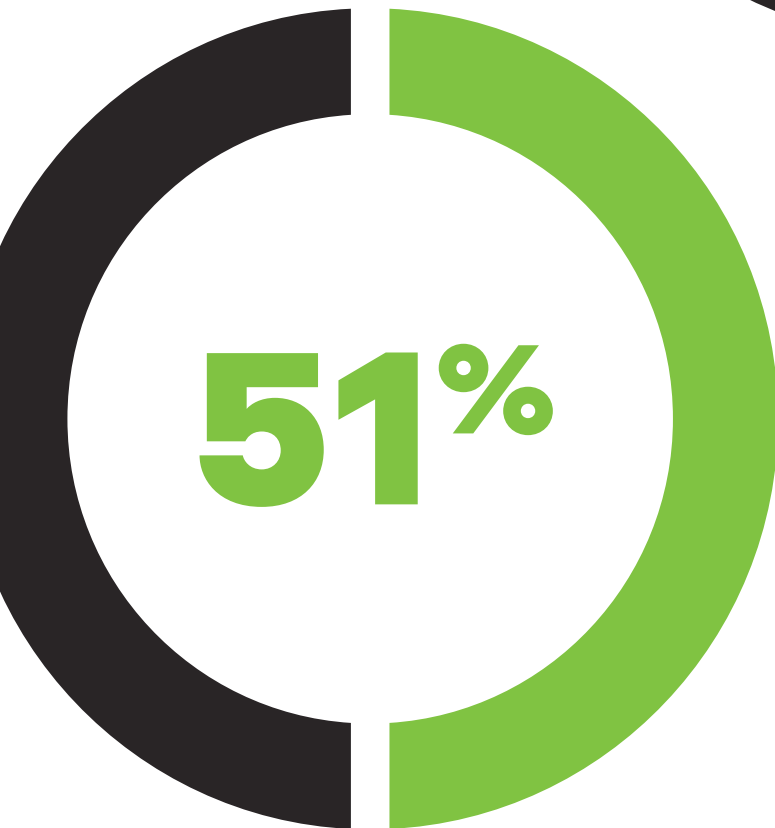
VACATION BY CAR



Comfortable
on **Day One**

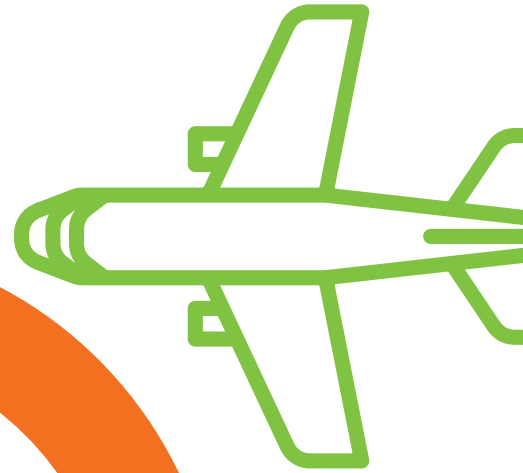


Comfortable
by **Day 30**

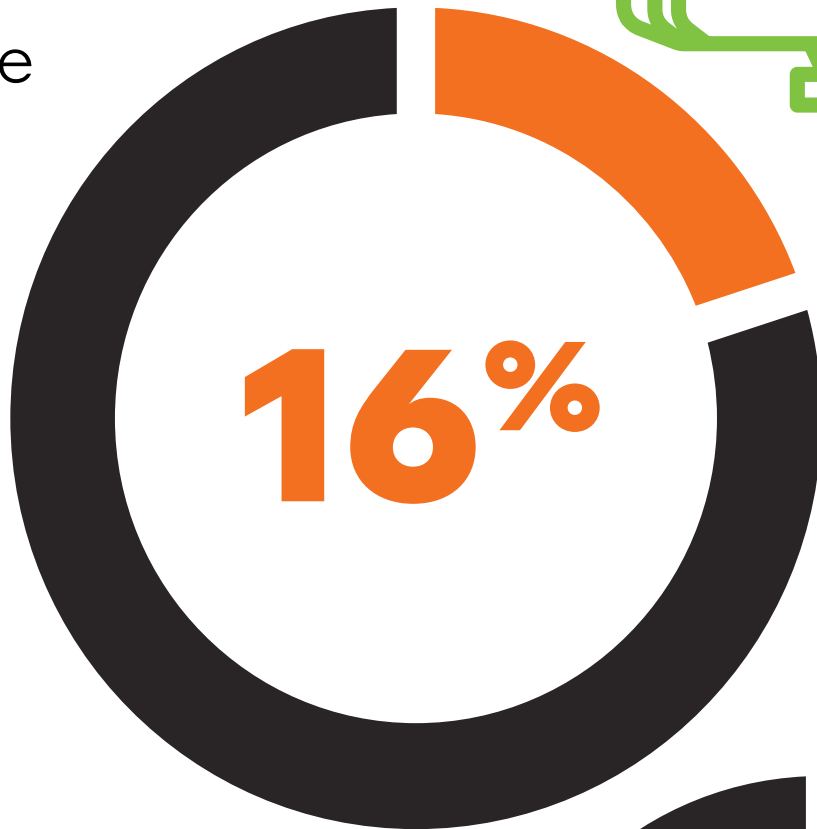


Comfortable
by **Day 60**

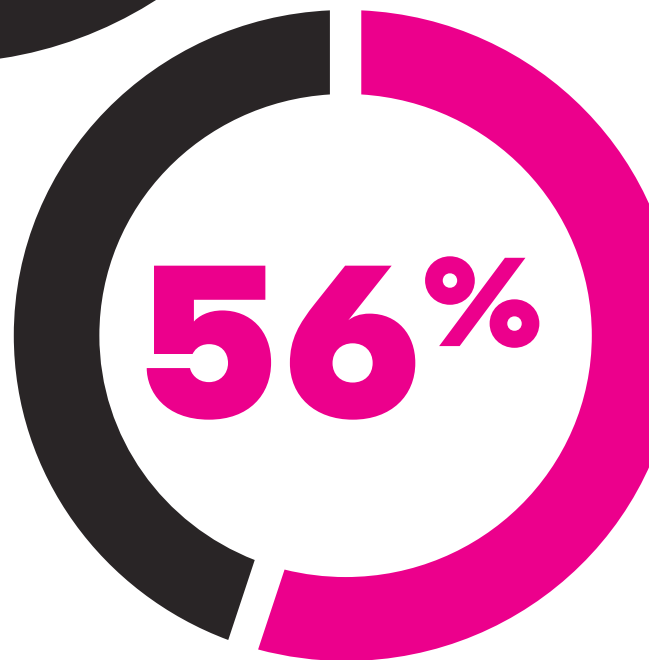
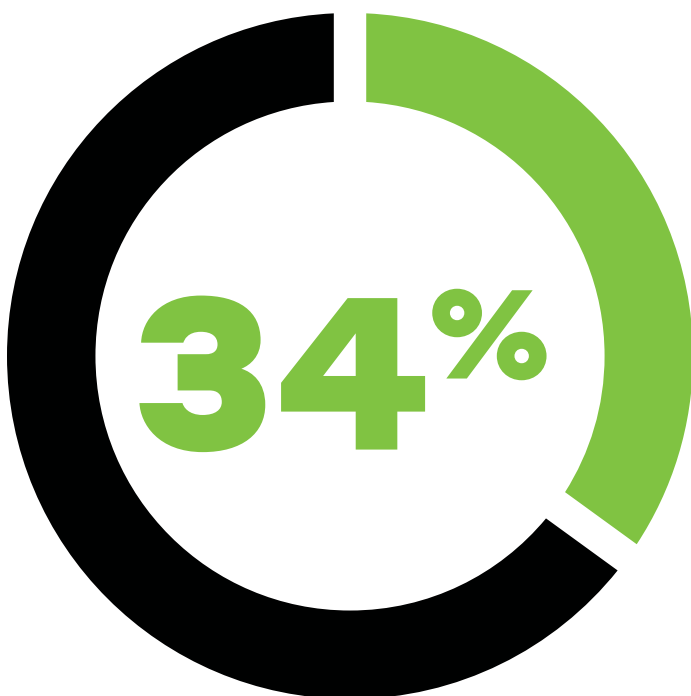
FLYING ON AN AIRPLANE



Comfortable
on **Day One**



Comfortable
by **Day 30**



Comfortable
by **Day 60**

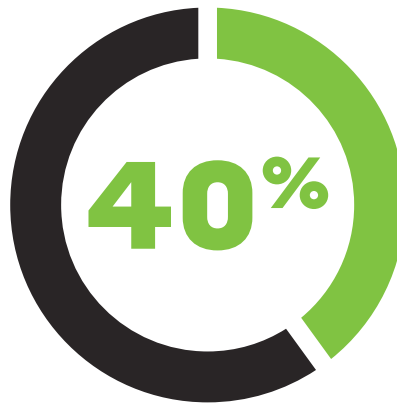
HOTELS WILL REGAIN TRUST SOONER THAN PRIVATELY OWNED VACATION RENTALS



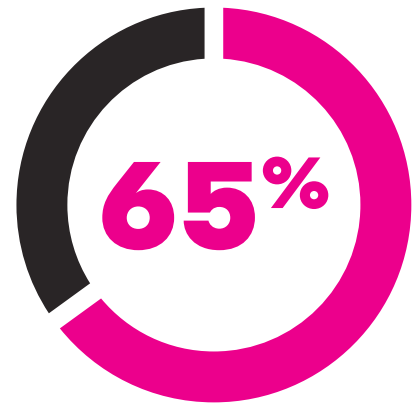
Comfortable on
Day One



Comfortable
by **Day 30**



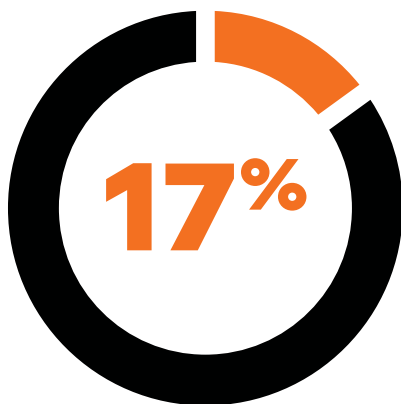
Comfortable
by **Day 60**



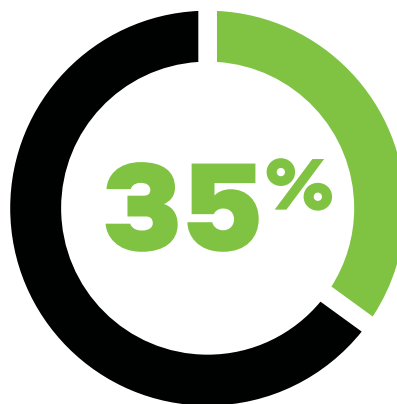
HOTEL STAY



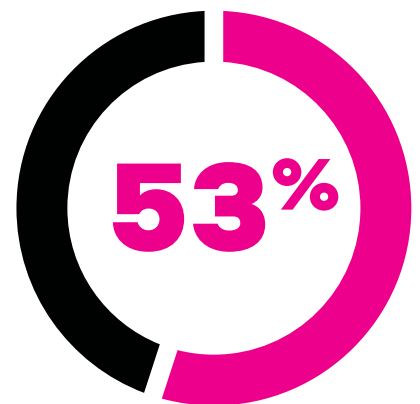
Comfortable on
Day One



Comfortable
by **Day 30**



Comfortable
by **Day 60**



PRIVATELY OWNED VACATION RENTAL

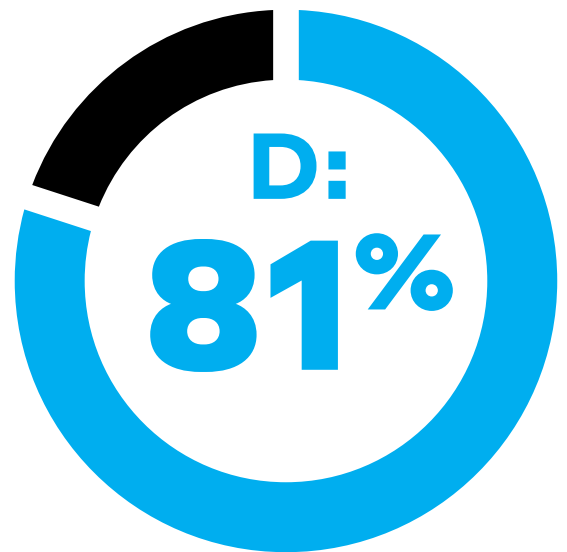
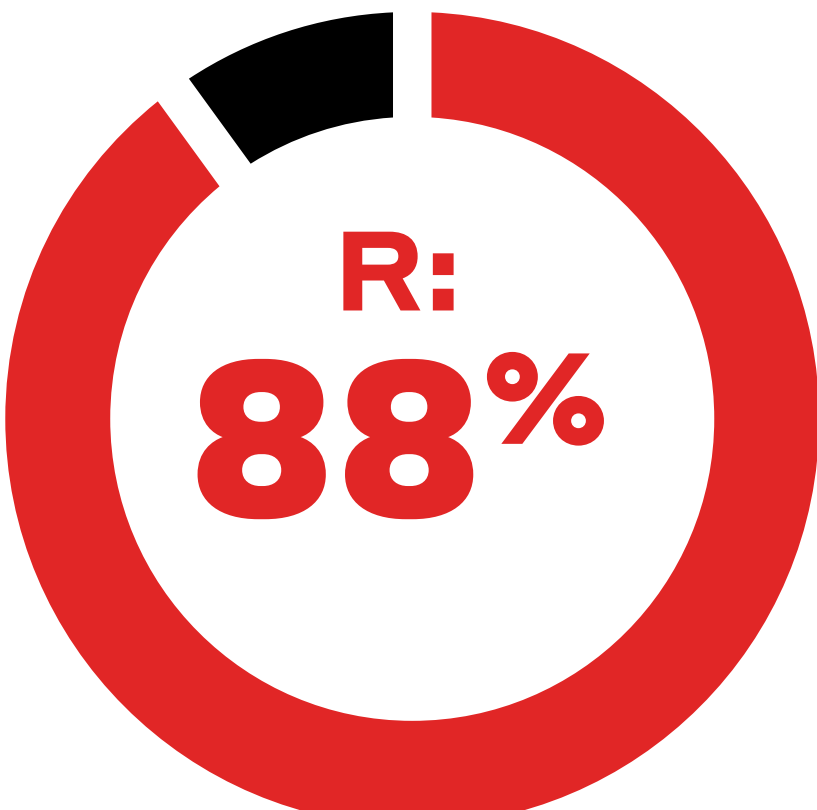
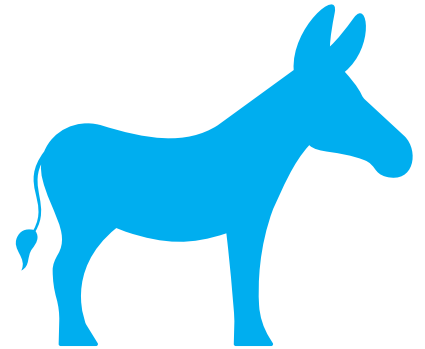
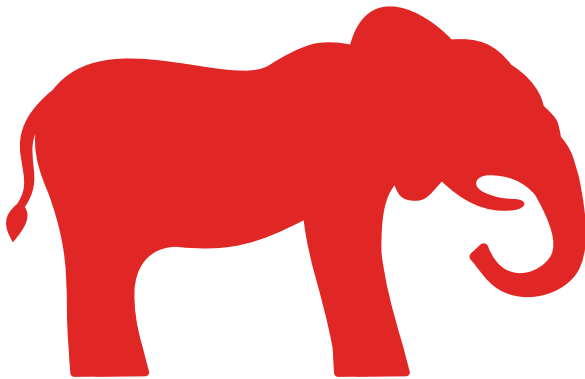
PARTISANSHIP/ TRUST

HOW DO POLITICAL
AFFILIATIONS INFLUENCE
AMERICANS' COMFORT
LEVELS AND CONCERNS?

BY 60 DAYS, REPUBLICANS WOULD BE MORE COMFORTABLE THAN DEMOCRATS:



VISITING WITH **FRIENDS/FAMILY**



BY 60 DAYS AFTER REOPENING BEGINS



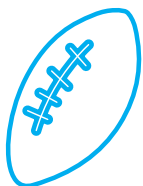
Taking a vacation by car



Going to a worship center



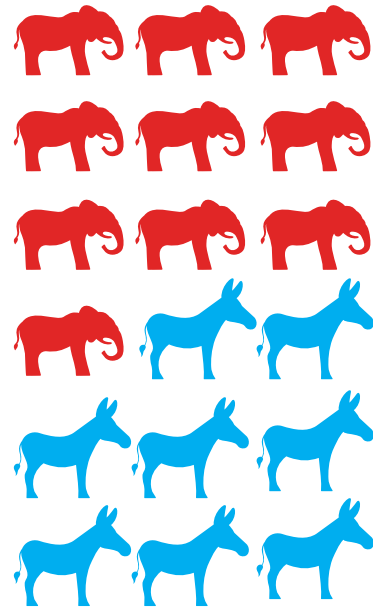
Staying in a privately owned vacation rental



Going to a sporting event



REPUBLICANS
ARE MORE
CONCERNED WITH THE
**FINANCIAL
IMPACT**
COVID-19 HAS
HAD ON THE ECONOMY

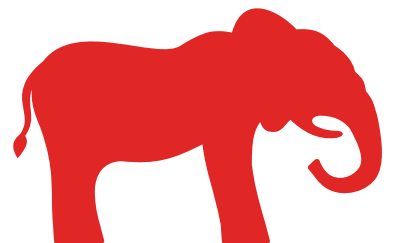
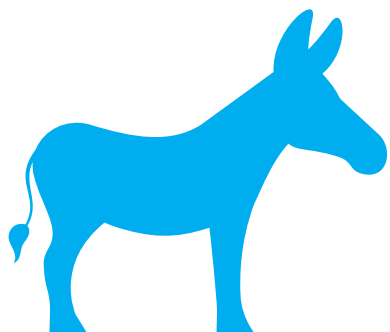
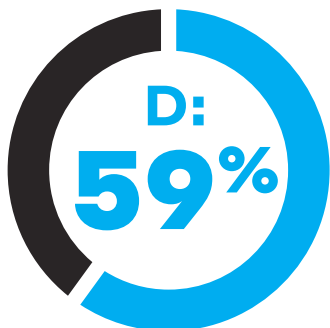


R: 54%



D: 44%

DEMOCRATS ARE MORE CONCERNED THE VIRUS MAY RETURN



WHO DO ADULTS TRUST TO PROVIDE INFORMATION ON
WHEN IT IS SAFE TO RETURN TO NORMAL ACTIVITIES?



37%
OF AMERICANS TRUST

THE WORLD HEALTH ORGANIZATION, DR. ANTHONY
FAUCI, AND THEIR STATE GOVERNMENT

DEMOCRATS VS. REPUBLICANS | TRUST IN...



THE CDC

D. 64%
R. 54%



DR. FAUCI

D. 43%
R. 34%



FEDERAL
GOVERNMENT

D. 17%
R. 39%



WORLD HEALTH
ORGANIZATION

D. 50%
R. 25%



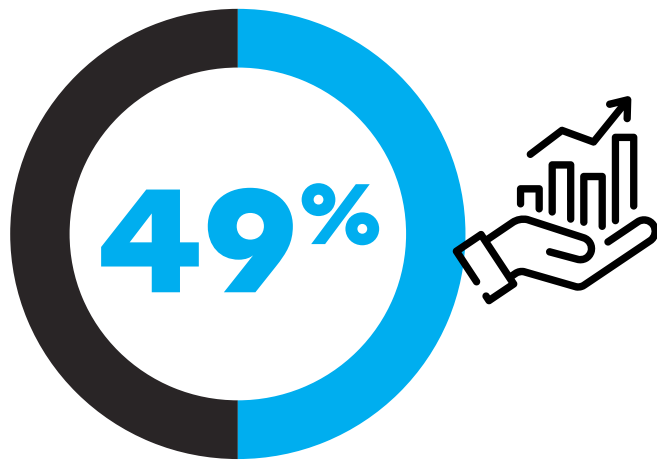


HAS COVID-19
INCREASED MONEY
CONCERNS?

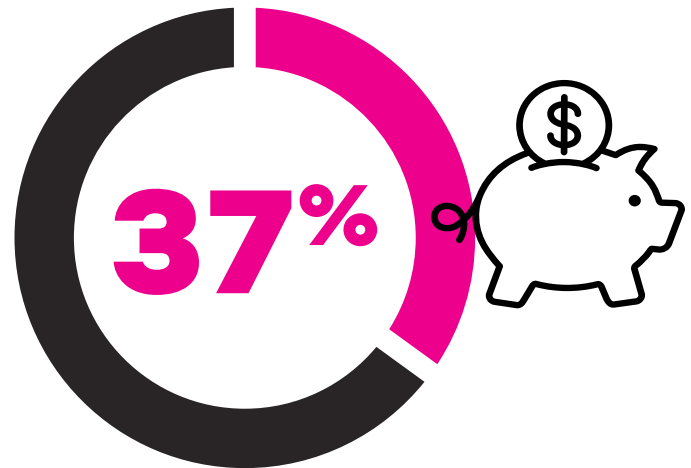
**YOU CAN
BANK ON IT.**

TOP PANDEMIC MONEY CONCERNS

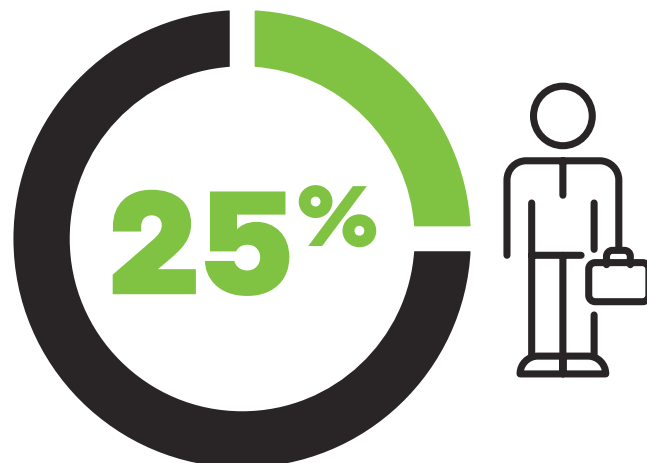
Pandemic has had a financial impact on the **economy**



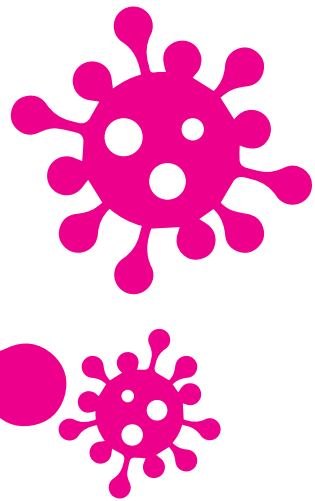
Pandemic has had a financial impact on **me personally**



Pandemic has had a financial impact on **my company/ employer**



CHANGE IN SPENDING HABITS POST-COVID-19



55%

Plan to focus more on budgeting/savings

32%

Don't anticipate changing their spending habits

13%

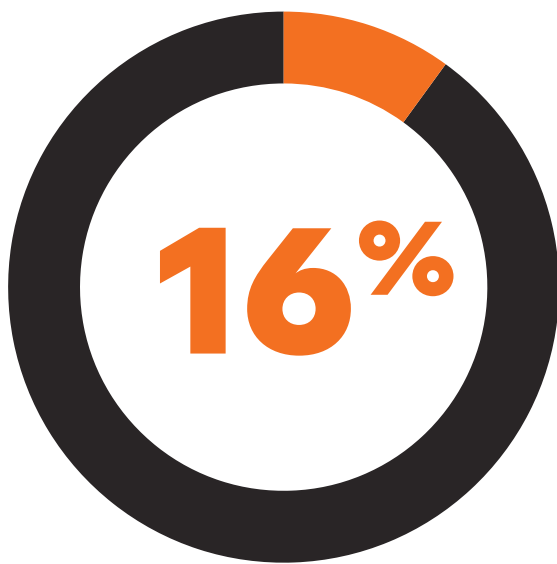
Won't restrict themselves from making at least some of the purchases that make them happy, because you never know what the future holds

A hand holding a stethoscope over a laptop keyboard, symbolizing telemedicine. The image is overlaid with a semi-transparent orange filter. The text is centered and reads:

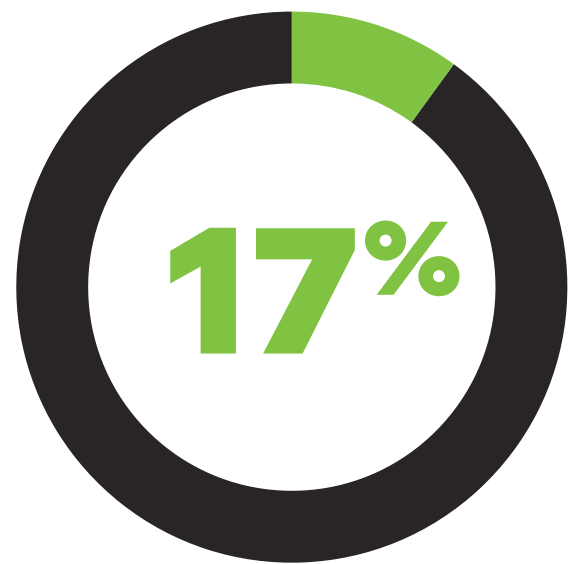
**TELEMEDICINE
GETS A HEALTHY
BOOST** AS COVID-19
CONCERNS HAVE
KEPT PEOPLE
HOME.

USAGE OF TELEMEDICINE

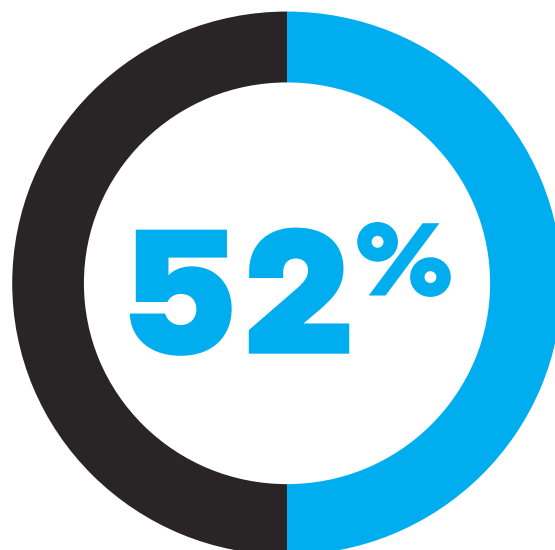
HAVE
used telemedicine
in the past



HAVE
tried it for the first time
during COVID-19

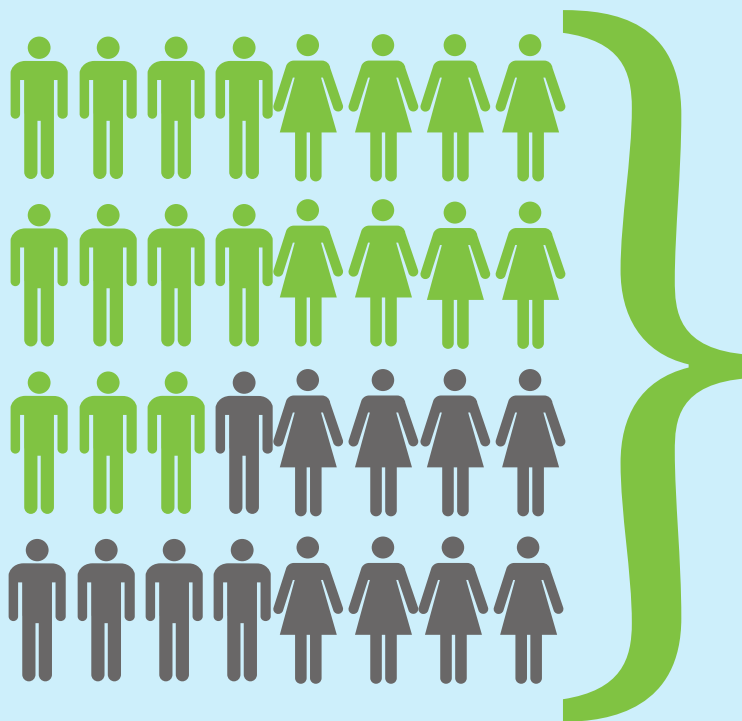


HAVE NOT
yet used it but would
if the need arose





OVER 3 IN 10 ARE NOT SURE IF THEIR PROVIDER OR THEIR CHILD'S PROVIDER OFFERS TELEMEDICINE.



Among those who indicate their provider started offering telemedicine during COVID-19,

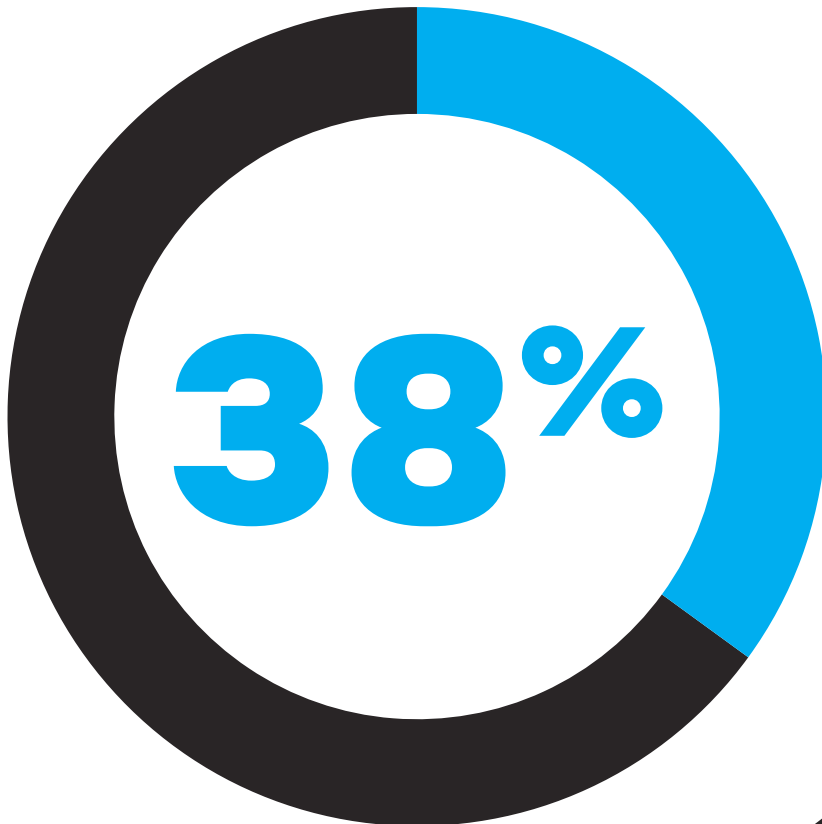
**NEARLY
6 IN 10**

say it shows them that the provider is taking this situation seriously.

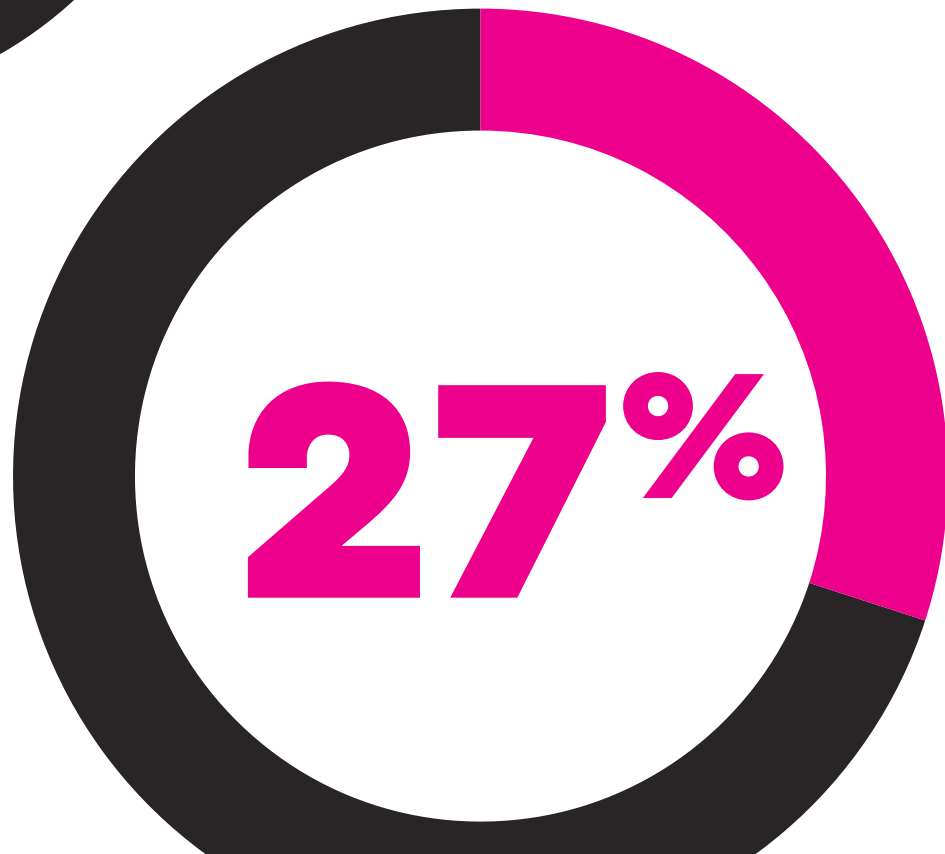
A top-down view of a person with short, dark hair, wearing a light-colored, textured shirt, sitting at a desk and using a tablet. The entire image is overlaid with a semi-transparent green filter. Several other tablets are visible on the desk around the person. The text is positioned in the lower half of the image.

THE VERDICT ON
**VIRTUAL
LEARNING**

SHOULD SCHOOLS USE VIRTUAL LEARNING WHEN COVID-19 IS OVER?

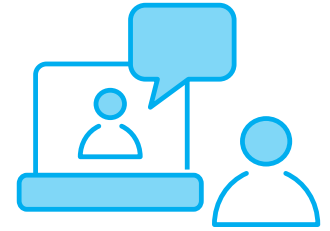


**UNDER SPECIAL
CIRCUMSTANCES
ONLY** (e.g., severe
weather, flu season)

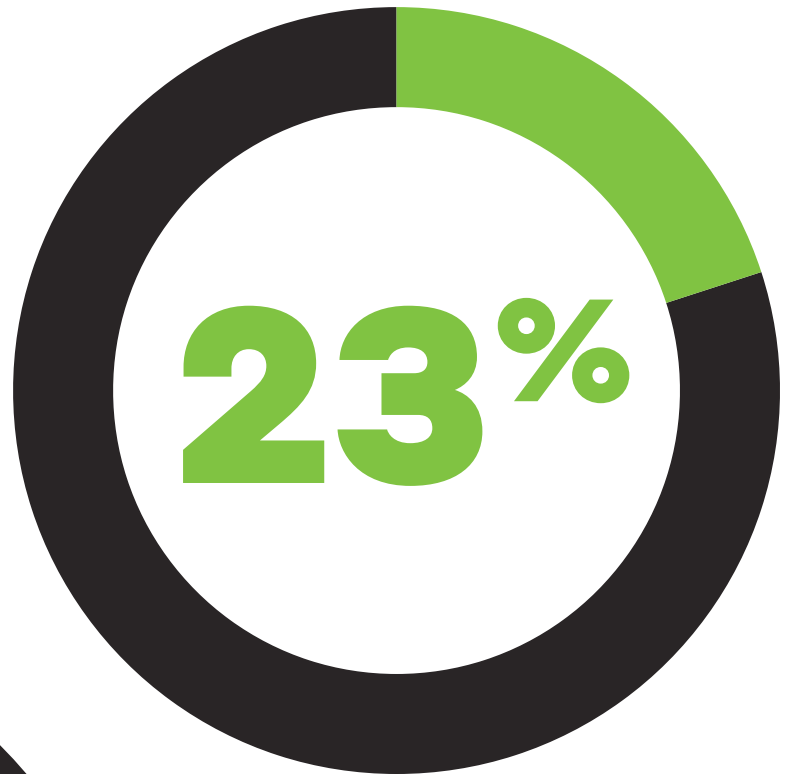


**WHEREVER
AND WHENEVER
POSSIBLE**

SHOULD SCHOOLS USE VIRTUAL LEARNING WHEN COVID-19 IS OVER?



**FOR PART OF
THE SCHOOL
YEAR,** but not all

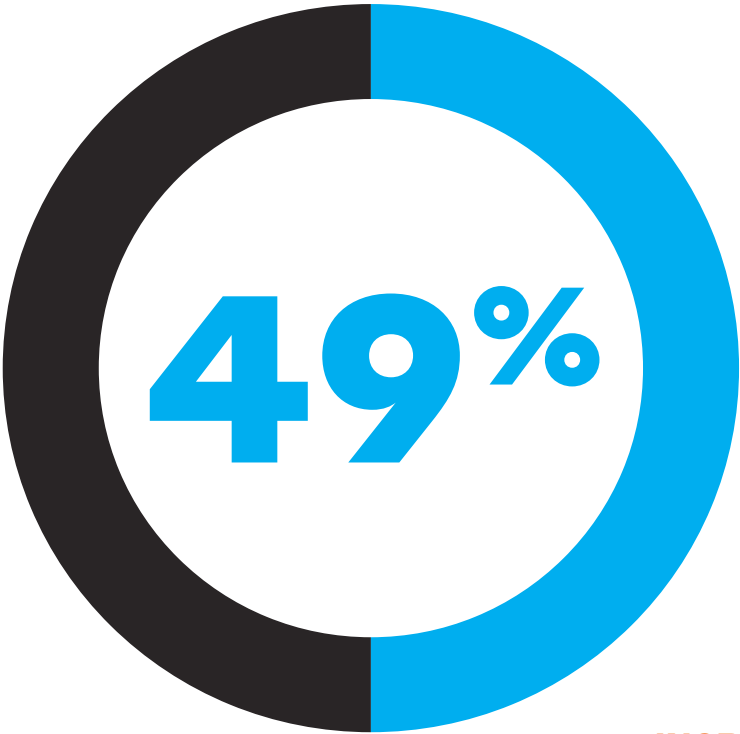


**NO, VIRTUAL
LEARNING
IS NOT AN
ACCEPTABLE**
way to teach

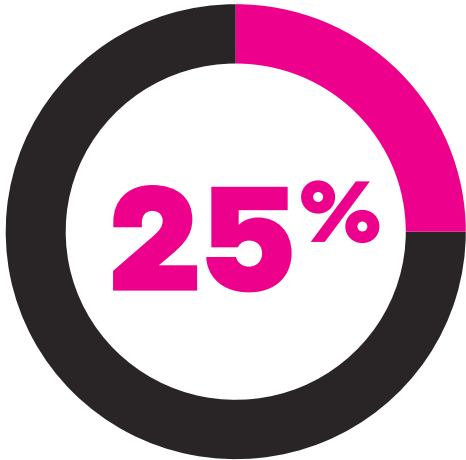
A hand holding a smartphone is shown in a dark, monochromatic purple/pink color scheme. Overlaid on the phone's screen are several semi-transparent notification icons: a heart with the number 23, a person icon with the number 17, and a speech bubble with the number 2. The background is a blurred image of the phone and hand.

SOCIAL MEDIA USAGE

WILL SOCIAL MEDIA HABITS CHANGE POST-COVID-19?



STAY
the same



READY
to take
a break



INCREASE
to stay connected
with family, friends
and brands online



**CURRENTLY
DON'T USE**

MORE LIKELY TO NEED A **SOCIAL MEDIA DETOX**



34%

Essential workers

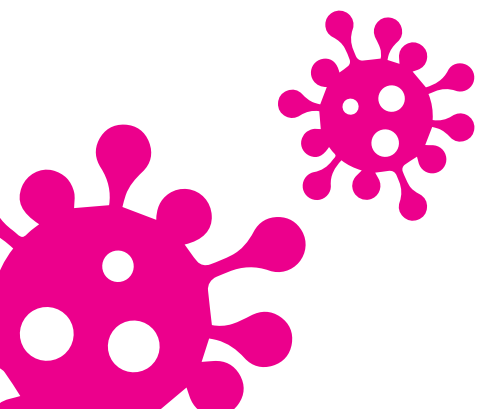
vs. non-essential workers 25%




30%

Parents

vs. non-parents 22%



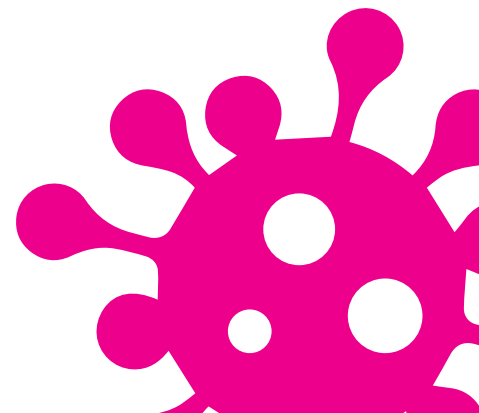
SOCIAL MEDIA CONSUMPTION LIKELY TO INCREASE



11% 25 years
and older
or less



26% 18- to 24-year-olds



WHAT COVID-19 BEHAVIORS SHOULD WE ALL KEEP DOING GOING FORWARD?



4 IN 10

would like to see better general hygiene and no more handshakes.



1 IN 4

will continue to support local community and restaurants with takeout and delivery.



1 IN 5

would like to continue having virtual get-togethers with friends and family.

mower

Marketing—Advertising—Public Relations

NEW YORK • BOSTON • ATLANTA • CHARLOTTE • CINCINNATI • BUFFALO • ROCHESTER • ALBANY • SYRACUSE

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