



PUBLIC POLL FINDINGS AND METHODOLOGY

Ipsos Poll on Consumer Behavior During COVID-19

Washington, DC, April 22, 2020

1. What level of threat do you think the coronavirus poses to you personally?

| | Wave 1 (N=1,114) | Wave 2 (N=1,111) |
|--------------------------|-----------------------------|-----------------------------|
| Very high threat | 14% | 10% |
| High threat | 22% | 22% |
| Moderate threat | 35% | 35% |
| Low threat | 16% | 21% |
| Very low threat | 10% | 10% |
| Don't know | 2% | 2% |
| <i>High threat (Net)</i> | 36% | 32% |
| <i>Low threat (Net)</i> | 26% | 31% |

2. If you were infected by coronavirus or Covid-19, how seriously do you think it would affect your health?

| | Wave 1 | Wave 2 |
|--------------------------|---------------|---------------|
| Not at all seriously | 10% | 12% |
| Somewhat seriously | 42% | 42% |
| Very seriously | 18% | 20% |
| Extremely seriously | 22% | 19% |
| Don't know / no response | 8% | 7% |

3. Have any of the following happened to you as a function of COVID-19? (Select all that apply)

| | Wave 1 | Wave 2 |
|---|---------------|---------------|
| I have lost my job (either temporarily or permanently) | 18% | 17% |
| Someone else who has been living in my household has lost their job | 14% | 12% |
| A family member has moved back in with me due to job loss | 5% | 3% |
| I have relocated to another city or town due to job loss | 2% | 2% |
| None of the above | 68% | 71% |





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4. For you and for where you live, what is the situation **today**? (Select all that apply)

| | Wave 1 | Wave 2 |
|---|---------------|---------------|
| K-12 schools are closed | 78% | 82% |
| There is a government imposed stay at home order, except for essential services | 73% | 72% |
| Restaurants and bars are allowed to remain open under reduced capacity or “take-out only” | 64% | 62% |
| All stores, except grocery stores and pharmacies, are closed | 54% | 52% |
| The majority of restaurants and bars are completely closed | 52% | 49% |
| Retail stores are closed but promoting online site/delivery | 49% | 54% |
| All public places are closed | 49% | 47% |
| Retail stores are open under limited hours or capacity | 38% | 34% |
| My company has either suggested or mandated I work from home | 22% | 19% |
| I am unable to work from home due to my type of employment | 20% | 16% |
| There is a curfew in place | 15% | 14% |
| None of the above | 2% | 2% |

5. For each of the statements below, indicate your level of agreement.

Total Agree Summary

| | Wave 1 | Wave 2 |
|---|---------------|---------------|
| I am staying home except for necessities (e.g., food) or work | 85% | 85% |
| I am working out new routines to keep safe | 67% | 64% |
| I am taking advantage of time at home | 64% | 67% |
| I have been avoiding shopping at physical stores | 63% | 61% |
| I am experiencing significant disruption in my life | 57% | 52% |
| I am frustrated by being cooped up | 56% | 54% |
| I am cautiously optimistic about the next month | 56% | 62% |
| I am disinfecting the packaging that is delivered to my home | 52% | 47% |
| I am changing existing plans and gathering supplies | 51% | 48% |
| I am exploring new things | 43% | 46% |
| I'm afraid to go out for necessities or work | 42% | 35% |
| I am not sure what to do next | 40% | 35% |
| I am having a harder time than usual paying my bills each month | 31% | 26% |





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a. I am staying home except for necessities (e.g., food) or work

| | Wave 1 | Wave 2 |
|----------------------------|------------|------------|
| Strongly agree | 55% | 49% |
| Somewhat agree | 30% | 36% |
| Neither agree nor disagree | 8% | 9% |
| Somewhat disagree | 4% | 4% |
| Strongly disagree | 2% | 2% |
| <i>Agree (Net)</i> | 85% | 85% |
| <i>Disagree (Net)</i> | 6% | 6% |

b. I'm afraid to go out for necessities or work

| | Wave 1 | Wave 2 |
|----------------------------|------------|------------|
| Strongly agree | 15% | 10% |
| Somewhat agree | 28% | 25% |
| Neither agree nor disagree | 20% | 22% |
| Somewhat disagree | 22% | 26% |
| Strongly disagree | 15% | 17% |
| <i>Agree (Net)</i> | 42% | 35% |
| <i>Disagree (Net)</i> | 38% | 43% |

c. I have been avoiding shopping at physical stores

| | Wave 1 | Wave 2 |
|----------------------------|------------|------------|
| Strongly agree | 29% | 27% |
| Somewhat agree | 34% | 34% |
| Neither agree nor disagree | 18% | 17% |
| Somewhat disagree | 13% | 14% |
| Strongly disagree | 6% | 8% |
| <i>Agree (Net)</i> | 63% | 61% |
| <i>Disagree (Net)</i> | 18% | 21% |

d. I am disinfecting the packaging that is delivered to my home

| | Wave 1 | Wave 2 |
|----------------------------|------------|------------|
| Strongly agree | 27% | 23% |
| Somewhat agree | 24% | 24% |
| Neither agree nor disagree | 21% | 22% |
| Somewhat disagree | 17% | 18% |
| Strongly disagree | 10% | 13% |
| <i>Agree (Net)</i> | 52% | 47% |
| <i>Disagree (Net)</i> | 27% | 31% |





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e. I am having a harder time than usual paying my bills each month

| | Wave 1 | Wave 2 |
|----------------------------|---------------|---------------|
| Strongly agree | 13% | 11% |
| Somewhat agree | 18% | 15% |
| Neither agree nor disagree | 26% | 25% |
| Somewhat disagree | 18% | 23% |
| Strongly disagree | 25% | 26% |
| <i>Agree (Net)</i> | 31% | 26% |
| <i>Disagree (Net)</i> | 43% | 49% |

f. I am not sure what to do next

| | Wave 1 | Wave 2 |
|----------------------------|---------------|---------------|
| Strongly agree | 12% | 10% |
| Somewhat agree | 28% | 25% |
| Neither agree nor disagree | 30% | 31% |
| Somewhat disagree | 18% | 22% |
| Strongly disagree | 12% | 12% |
| <i>Agree (Net)</i> | 40% | 35% |
| <i>Disagree (Net)</i> | 30% | 34% |

g. I am changing existing plans and gathering supplies

| | Wave 1 | Wave 2 |
|----------------------------|---------------|---------------|
| Strongly agree | 14% | 12% |
| Somewhat agree | 36% | 35% |
| Neither agree nor disagree | 33% | 32% |
| Somewhat disagree | 12% | 15% |
| Strongly disagree | 5% | 6% |
| <i>Agree (Net)</i> | 51% | 48% |
| <i>Disagree (Net)</i> | 17% | 21% |

h. I am working out new routines to keep safe

| | Wave 1 | Wave 2 |
|----------------------------|---------------|---------------|
| Strongly agree | 23% | 17% |
| Somewhat agree | 44% | 47% |
| Neither agree nor disagree | 22% | 24% |
| Somewhat disagree | 6% | 8% |
| Strongly disagree | 5% | 4% |
| <i>Agree (Net)</i> | 67% | 64% |
| <i>Disagree (Net)</i> | 11% | 12% |



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i. I am taking advantage of time at home

| | Wave 1 | Wave 2 |
|----------------------------|------------|------------|
| Strongly agree | 24% | 24% |
| Somewhat agree | 40% | 43% |
| Neither agree nor disagree | 26% | 23% |
| Somewhat disagree | 7% | 7% |
| Strongly disagree | 2% | 3% |
| <i>Agree (Net)</i> | 64% | 67% |
| <i>Disagree (Net)</i> | 10% | 10% |

j. I am frustrated by being cooped up

| | Wave 1 | Wave 2 |
|----------------------------|------------|------------|
| Strongly agree | 23% | 23% |
| Somewhat agree | 33% | 32% |
| Neither agree nor disagree | 22% | 20% |
| Somewhat disagree | 15% | 16% |
| Strongly disagree | 8% | 9% |
| <i>Agree (Net)</i> | 56% | 54% |
| <i>Disagree (Net)</i> | 22% | 25% |

k. I am cautiously optimistic about the next month

| | Wave 1 | Wave 2 |
|----------------------------|------------|------------|
| Strongly agree | 16% | 15% |
| Somewhat agree | 41% | 47% |
| Neither agree nor disagree | 23% | 21% |
| Somewhat disagree | 16% | 13% |
| Strongly disagree | 4% | 5% |
| <i>Agree (Net)</i> | 56% | 62% |
| <i>Disagree (Net)</i> | 20% | 17% |

l. I am experiencing significant disruption in my life

| | Wave 1 | Wave 2 |
|----------------------------|------------|------------|
| Strongly agree | 22% | 18% |
| Somewhat agree | 35% | 34% |
| Neither agree nor disagree | 22% | 23% |
| Somewhat disagree | 14% | 16% |
| Strongly disagree | 7% | 9% |
| <i>Agree (Net)</i> | 57% | 52% |
| <i>Disagree (Net)</i> | 21% | 24% |



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m. I am exploring new things

| | Wave 1 | Wave 2 |
|----------------------------|---------------|---------------|
| Strongly agree | 11% | 10% |
| Somewhat agree | 32% | 36% |
| Neither agree nor disagree | 36% | 33% |
| Somewhat disagree | 15% | 16% |
| Strongly disagree | 6% | 5% |
| <i>Agree (Net)</i> | 43% | 46% |
| <i>Disagree (Net)</i> | 21% | 21% |

6. Regarding COVID-19, which of the following are true of you? (Select all that apply)

| | Wave 1 | Wave 2 |
|--|---------------|---------------|
| A friend or acquaintance has been tested and diagnosed with COVID-19 | 14% | 14% |
| Someone I know suspects they have or had COVID-19 | 13% | 14% |
| A relative has been tested and diagnosed with COVID-19 | 6% | 6% |
| I have been tested and diagnosed with COVID-19 | 2% | 1% |
| None of the above | 70% | 70% |





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7. Which of the following are you currently using or doing more as a function of the COVID-19 crisis? (Select all that apply)

| | Wave 1 | Wave 2 |
|--|---------------|---------------|
| Social media | 44% | 43% |
| Streaming services to watch TV shows/content | 41% | 42% |
| Instant messaging | 33% | 29% |
| Video chat with friends | 33% | 31% |
| Home delivery or pick up from restaurants | 32% | 30% |
| The app from your primary bank | 17% | 17% |
| Home delivery of groceries | 15% | 11% |
| Video conferencing services for work | 14% | 13% |
| Contactless payment with a smartphone | 13% | 12% |
| Pre-order and pick-up of groceries | 13% | 13% |
| Tipping | 12% | 11% |
| Podcasts | 9% | 8% |
| Pre-order and pick-up of non-grocery purchases (e.g., electronics or home goods) | 9% | 10% |
| Credit cards by touch payment | 8% | 7% |
| Telemedicine websites or apps | 7% | 8% |
| Person-to-person payment apps | 7% | 7% |
| Home delivery of meal preparation kit(s) | 6% | 5% |
| Banking services such as loans or refinance | 5% | 3% |
| Home delivery of alcoholic beverages | 4% | 3% |
| Financial services apps from new tech banks | 3% | 4% |
| Ride sharing service | 2% | 2% |
| None of these | 17% | 19% |





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8. Since the COVID-19 crisis began, have you used a brand, product, service or feature that you had never used before in the following areas? (Select all that apply)

| | Wave 1 | Wave 2 |
|--|---------------|---------------|
| Video chat with friends | 14% | 16% |
| Home delivery or pick up from restaurants | 10% | 11% |
| Home delivery of groceries | 9% | 8% |
| Streaming services to watch TV shows/content | 9% | 11% |
| Social media | 9% | 10% |
| Video conferencing services for work | 8% | 7% |
| Telemedicine websites or apps | 7% | 8% |
| Pre-order and pick-up of groceries | 6% | 7% |
| Instant messaging | 6% | 6% |
| Podcasts | 5% | 5% |
| Pre-order and pick-up of non-grocery purchases (e.g., electronics or home goods) | 4% | 6% |
| The app from your primary bank | 4% | 4% |
| Contactless payment with a smartphone | 4% | 4% |
| Credit cards by touch payment | 3% | 4% |
| Person-to-person payment apps | 3% | 3% |
| Financial services apps from new tech banks | 3% | 2% |
| Home delivery of alcoholic beverages | 3% | 2% |
| Home delivery of meal preparation kit(s) | 3% | 3% |
| Banking services such as loans or refinance | 2% | 2% |
| Ride sharing service | 2% | 2% |
| None of these | 52% | 51% |





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9. Please select the categories below where you expect to continue using the new brands, products, services or features you have tried. (Select all that apply; **item shown if respondent selected in Q8**)

| | Wave 1 (N=536) | Wave 2 (N=530) |
|--|---------------------------|---------------------------|
| Streaming services to watch TV shows/content | (N=96) 85% | (N=120) 82% |
| Social media | (N=96) 80% | (N=108) 79% |
| The app from your primary bank | (N=46) 71% | (N=47) 73% |
| Video chat with friends | (N=154) 70% | (N=176) 74% |
| Pre-order and pick-up of groceries | (N=72) 67% | (N=80) 68% |
| Credit cards by touch payment | (N=37) 67% | (N=43) 45% |
| Home delivery of groceries | (N=103) 65% | (N=86) 60% |
| Contactless payment with a smartphone | (N=45) 65% | (N=44) 77% |
| Home delivery of alcoholic beverages | (N=34) 65% | (N=26) 51% |
| Podcasts | (N=56) 65% | (N=53) 54% |
| Home delivery or pick up from restaurants | (N=115) 64% | (N=122) 70% |
| Pre-order and pick-up of non-grocery purchases (e.g., electronics or home goods) | (N=47) 64% | (N=68) 66% |
| Video conferencing services for work | (N=90) 63% | (N=73) 60% |
| Instant messaging | (N=71) 61% | (N=66) 69% |
| Telemedicine websites or apps | (N=77) 61% | (N=86) 61% |
| Financial services apps from new tech banks | (N=34) 55% | (N=19) 47% |
| Person-to-person payment apps | (N=36) 55% | (N=32) 60% |
| Home delivery of meal preparation kit(s) | (N=29) 50% | (N=28) 44% |
| Banking services such as loans or refinance | (N=28) 43% | (N=26) 58% |
| Ride sharing service | (N=18) 42% | (N=19) 34% |





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10. Since the COVID-19 crisis began, have you tried a brand, product or service that you had never used before for the categories below? (Select all that apply)

Category Summary

| | Wave 1 | Wave 2 |
|---|---------------|---------------|
| Food Categories of Any Kind | 16% | 16% |
| Paper Products of Any Kind | 15% | 14% |
| Entertainment | 13% | 12% |
| New Apps of Any Kind | 12% | 14% |
| Alcoholic Drinks of Any Kind | 7% | 7% |
| Grooming & Beauty of Any Kind | 6% | 7% |
| Pet Care of Any Kind | 6% | 4% |
| Medication of Any Kind | 5% | 7% |
| Gasoline or Fuel | 5% | 5% |
| Insurance Services of Any Kind | 2% | 2% |
| Telephone or Internet Service Providers | 2% | 3% |
| None of these | 60% | 63% |





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| | Wave 1 | Wave 2 |
|---|---------------|---------------|
| <i>Food Categories Of Any Kind</i> | 16% | 16% |
| Staple Foods (Bread, Milk, Eggs, Etc.) | 8% | 7% |
| Frozen Food | 8% | 7% |
| Snacks (Chips, Sweets, Etc.) | 7% | 6% |
| Canned Food | 6% | 6% |
| Microwaveable Meals | 4% | 5% |
| Nutrition Drinks And Bars | 3% | 2% |
| Prepared Foods | 3% | 3% |
| <i>Paper Products Of Any Kind</i> | 15% | 14% |
| Toilet Paper | 12% | 12% |
| Paper Towels | 9% | 7% |
| Tissues | 4% | 2% |
| Diapers | 1% | 1% |
| <i>Entertainment</i> | 13% | 12% |
| Streaming Services (E.G Netflix, Amazon Prime, Disney +, Hulu, Quibi) | 7% | 9% |
| Streaming Devices | 3% | 2% |
| Movie Purchases | 3% | 1% |
| Movie Rentals | 2% | 3% |
| Video Game Purchases | 2% | 2% |
| Basic Cable Services | 1% | 2% |
| E-Books | 1% | 1% |
| Video game rentals | 1% | 1% |
| <i>New Apps Of Any Kind</i> | 12% | 14% |
| <i>Alcoholic Drinks Of Any Kind</i> | 7% | 7% |
| Wine | 4% | 3% |
| Beer | 3% | 3% |
| Hard Seltzer Or Cider | 2% | 2% |
| Spirits | 2% | 2% |
| <i>Grooming & Beauty Of Any Kind</i> | 6% | 7% |
| Soap And Shampoo | 4% | 5% |
| Facial Care, Including Make-Up, Shaving And Moisturizing | 3% | 4% |
| <i>Pet Care Of Any Kind</i> | 6% | 4% |
| <i>Medication Of Any Kind</i> | 5% | 7% |
| Non Prescription Medication | 3% | 3% |
| Prescription Medication | 2% | 3% |
| Pain medicine | 1% | 2% |
| Allergy relief | 1% | 1% |
| Respiratory medicine | * | 1% |
| <i>Gasoline Or Fuel</i> | 5% | 5% |
| <i>Insurance Services Of Any Kind</i> | 2% | 2% |
| <i>Telephone Or Internet Service Providers</i> | 2% | 3% |
| None of these | 60% | 63% |





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11. Please select the categories below where you expect to continue using the new products, services or features you have tried. (Select all that apply; **item shown if respondent selected in Q10**)

| | Wave 1 (N=436) | Wave 2 (N=406) |
|---|---------------------------|---------------------------|
| News subscriptions (e.g online newspapers or magazines) | (N=10) 92% | (N=9) 74% |
| Streaming services (e.g Netflix, Amazon Prime, Disney +, Hulu, Quibi) | (N=78) 87% | (N=98) 71% |
| Facial care, including make-up, shaving and moisturizing | (N=33) 79% | (N=43) 69% |
| Snacks (chips, sweets, etc.) | (N=81) 75% | (N=71) 69% |
| Spirits | (N=24) 75% | (N=19) 74% |
| GASOLINE OR FUEL | (N=53) 75% | (N=50) 55% |
| NEW APPS OF ANY KIND | (N=137) 71% | (N=150) 69% |
| Hard seltzer or cider | (N=22) 69% | (N=20) 44% |
| Nutrition drinks and bars | (N=29) 68% | (N=18) 77% |
| Beer | (N=29) 66% | (N=35) 69% |
| Frozen food | (N=84) 65% | (N=77) 56% |
| Video game purchases | (N=23) 65% | (N=19) 88% |
| Allergy relief | (N=15) 64% | (N=13) 40% |
| Prescription medication | (N=21) 62% | (N=29) 47% |
| Soap and shampoo | (N=48) 60% | (N=57) 57% |
| Movie rentals | (N=26) 60% | (N=29) 56% |
| Wine | (N=42) 58% | (N=32) 77% |



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| | | |
|---|----------------|----------------|
| Prepared foods | (N=33) 58% | (N=32) 55% |
| INSURANCE SERVICES OF ANY KIND | (N=20) 58% | (N=21) 56% |
| Pain medicine | (N=15) 57% | (N=21) 45% |
| PET CARE OF ANY KIND | (N=72) 57% | (N=49) 61% |
| TELEPHONE OR INTERNET SERVICE PROVIDERS | (N=28) 57% | (N=38) 70% |
| Microwaveable meals | (N=47) 56% | (N=50) 68% |
| Tissues | (N=41) 56% | (N=27) 38% |
| Basic cable services | (N=16) 55% | (N=20) 58% |
| Streaming devices | (N=35) 54% | (N=24) 73% |
| E-books | (N=16) 54% | (N=15) 76% |
| Video game rentals | (N=7) 51% | (N=6) 54% |
| Canned food | (N=72) 50% | (N=65) 62% |
| Movie purchases | (N=29) 50% | (N=16) 63% |
| Staple foods (bread, milk, eggs, etc.) | (N=87) 49% | (N=83) 60% |
| Toilet paper | (N=137) 46% | (N=135) 46% |
| Paper towels | (N=105) 45% | (N=82) 44% |
| Non prescription medication | (N=28) 45% | (N=35) 47% |
| Diapers | (N=8) 40% | (N=7) 14% |
| Respiratory medicine | (N=5) - | (N=13) 37% |



12. Thinking about your habits and routines now, to what extent do you agree or disagree with the following statements?

Total Agree Summary

| | Wave 1 | Wave 2 |
|--|--------|--------|
| I drive my personal vehicle less | 74% | 72% |
| I miss my old routines | 68% | 61% |
| I am keeping up with my usual grooming habits | 64% | 64% |
| I am currently trying to eat healthier | 52% | 51% |
| I am cooking from scratch more | 52% | 53% |
| I am keeping up with my usual exercise routine | 43% | 41% |
| I have new routines for grocery shopping that I hope to continue | 40% | 38% |
| I have new cooking routines that I hope to continue | 39% | 38% |
| I have new exercise routines that I hope to continue | 34% | 31% |
| I am exercising more | 32% | 27% |
| I have new routines for grooming and personal care that I hope to continue | 26% | 26% |

a. I am currently trying to eat healthier

| | Wave 1 | Wave 2 |
|----------------------------|------------|------------|
| Strongly agree | 16% | 15% |
| Somewhat agree | 36% | 36% |
| Neither agree nor disagree | 31% | 30% |
| Somewhat disagree | 10% | 12% |
| Strongly disagree | 7% | 6% |
| Don't know | * | 1% |
| Agree (Net) | 52% | 51% |
| Disagree (Net) | 17% | 18% |

b. I am keeping up with my usual grooming habits

| | Wave 1 | Wave 2 |
|----------------------------|------------|------------|
| Strongly agree | 27% | 24% |
| Somewhat agree | 37% | 40% |
| Neither agree nor disagree | 16% | 15% |
| Somewhat disagree | 14% | 14% |
| Strongly disagree | 5% | 6% |
| Don't know | * | 1% |
| Agree (Net) | 64% | 64% |
| Disagree (Net) | 20% | 20% |

c. I am keeping up with my usual exercise routine

| | Wave 1 | Wave 2 |
|----------------------------|------------|------------|
| Strongly agree | 17% | 14% |
| Somewhat agree | 25% | 27% |
| Neither agree nor disagree | 30% | 26% |
| Somewhat disagree | 14% | 17% |
| Strongly disagree | 13% | 15% |
| Don't know | * | 1% |
| <i>Agree (Net)</i> | <i>43%</i> | <i>41%</i> |
| <i>Disagree (Net)</i> | <i>27%</i> | <i>31%</i> |

d. I am exercising more

| | Wave 1 | Wave 2 |
|----------------------------|------------|------------|
| Strongly agree | 13% | 9% |
| Somewhat agree | 19% | 18% |
| Neither agree nor disagree | 28% | 27% |
| Somewhat disagree | 20% | 22% |
| Strongly disagree | 19% | 23% |
| Don't know | 1% | 1% |
| <i>Agree (Net)</i> | <i>32%</i> | <i>27%</i> |
| <i>Disagree (Net)</i> | <i>39%</i> | <i>45%</i> |

e. I drive my personal vehicle less

| | Wave 1 | Wave 2 |
|----------------------------|------------|------------|
| Strongly agree | 46% | 44% |
| Somewhat agree | 27% | 27% |
| Neither agree nor disagree | 13% | 14% |
| Somewhat disagree | 5% | 5% |
| Strongly disagree | 6% | 7% |
| Don't know | 1% | 3% |
| <i>Agree (Net)</i> | <i>74%</i> | <i>72%</i> |
| <i>Disagree (Net)</i> | <i>12%</i> | <i>12%</i> |



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f. I am cooking from scratch more

| | Wave 1 | Wave 2 |
|----------------------------|---------------|---------------|
| Strongly agree | 19% | 19% |
| Somewhat agree | 32% | 34% |
| Neither agree nor disagree | 28% | 24% |
| Somewhat disagree | 11% | 12% |
| Strongly disagree | 10% | 9% |
| Don't know | * | 2% |
| <i>Agree (Net)</i> | 52% | 53% |
| <i>Disagree (Net)</i> | 21% | 22% |

g. I have new exercise routines that I hope to continue

| | Wave 1 | Wave 2 |
|----------------------------|---------------|---------------|
| Strongly agree | 13% | 10% |
| Somewhat agree | 21% | 21% |
| Neither agree nor disagree | 31% | 29% |
| Somewhat disagree | 18% | 18% |
| Strongly disagree | 16% | 19% |
| Don't know | 1% | 2% |
| <i>Agree (Net)</i> | 34% | 31% |
| <i>Disagree (Net)</i> | 34% | 38% |

h. I have new cooking routines that I hope to continue

| | Wave 1 | Wave 2 |
|----------------------------|---------------|---------------|
| Strongly agree | 12% | 10% |
| Somewhat agree | 27% | 28% |
| Neither agree nor disagree | 38% | 33% |
| Somewhat disagree | 13% | 16% |
| Strongly disagree | 9% | 11% |
| Don't know | 1% | 2% |
| <i>Agree (Net)</i> | 39% | 38% |
| <i>Disagree (Net)</i> | 23% | 28% |



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i. I have new routines for grocery shopping that I hope to continue

| | Wave 1 | Wave 2 |
|----------------------------|---------------|---------------|
| Strongly agree | 14% | 12% |
| Somewhat agree | 26% | 26% |
| Neither agree nor disagree | 31% | 30% |
| Somewhat disagree | 17% | 19% |
| Strongly disagree | 11% | 11% |
| Don't know | 1% | 1% |
| <i>Agree (Net)</i> | 40% | 38% |
| <i>Disagree (Net)</i> | 28% | 30% |

j. I have new routines for grooming and personal care that I hope to continue

| | Wave 1 | Wave 2 |
|----------------------------|---------------|---------------|
| Strongly agree | 10% | 10% |
| Somewhat agree | 16% | 17% |
| Neither agree nor disagree | 37% | 30% |
| Somewhat disagree | 19% | 24% |
| Strongly disagree | 17% | 18% |
| Don't know | 1% | 1% |
| <i>Agree (Net)</i> | 26% | 26% |
| <i>Disagree (Net)</i> | 36% | 42% |

k. I miss my old routines

| | Wave 1 | Wave 2 |
|----------------------------|---------------|---------------|
| Strongly agree | 34% | 27% |
| Somewhat agree | 34% | 34% |
| Neither agree nor disagree | 20% | 24% |
| Somewhat disagree | 7% | 9% |
| Strongly disagree | 4% | 5% |
| Don't know | 1% | 1% |
| <i>Agree (Net)</i> | 68% | 61% |
| <i>Disagree (Net)</i> | 11% | 14% |





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13. Thinking about the services and activities that are more restricted in the current environment, which of the following do you miss most right now? Think about your day-to-day activities and not if you may have lost a job in these areas. You may select up to three.

| | Wave 1 | Wave 2 |
|--|--------|--------|
| Restaurants and bars | 59% | 61% |
| Grocery stores | 31% | 28% |
| Entertainment centers (movie theaters, concerts) | 28% | 30% |
| Shopping centers or malls | 27% | 27% |
| Religious centers/Churches | 23% | 24% |
| Trip planning | 21% | 22% |
| Fitness centers/Studios/Gyms | 19% | 19% |
| Driving my personal vehicle | 15% | 14% |
| Public transportation | 6% | 5% |
| Hotels | 5% | 4% |
| Ride sharing services | 3% | 2% |
| Telecommunications service locations (eg Verizon store, AT&T Store, Best Buy Mobile Section) | 2% | 2% |
| Rental cars | 2% | 2% |

14. Thinking about when COVID-19-related closures and restrictions end, how will you proceed in using these services?

a. Restaurants and bars

| | Wave 1 | Wave 2 |
|--|--------|--------|
| Will start using again immediately and more than I did before | 8% | 9% |
| Will start using again immediately and about as much as I did before | 28% | 27% |
| Will wait until I'm sure it is safe but will use about as much as I did before | 42% | 41% |
| Will use less than I did before, for at least a few months | 13% | 14% |
| Will likely use less than I did before, permanently | 4% | 5% |
| I don't use this service | 5% | 5% |

b. Hotels

| | Wave 1 | Wave 2 |
|--|--------|--------|
| Will start using again immediately and more than I did before | 4% | 3% |
| Will start using again immediately and about as much as I did before | 13% | 13% |
| Will wait until I'm sure it is safe but will use about as much as I did before | 35% | 34% |
| Will use less than I did before, for at least a few months | 14% | 13% |
| Will likely use less than I did before, permanently | 6% | 6% |
| I don't use this service | 27% | 30% |





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c. Rental cars

| | Wave 1 | Wave 2 |
|--|--------|--------|
| Will start using again immediately and more than I did before | 3% | 3% |
| Will start using again immediately and about as much as I did before | 7% | 9% |
| Will wait until I'm sure it is safe but will use about as much as I did before | 18% | 18% |
| Will use less than I did before, for at least a few months | 9% | 6% |
| Will likely use less than I did before, permanently | 4% | 4% |
| I don't use this service | 59% | 59% |

d. Ride sharing services

| | Wave 1 | Wave 2 |
|--|--------|--------|
| Will start using again immediately and more than I did before | 3% | 3% |
| Will start using again immediately and about as much as I did before | 9% | 9% |
| Will wait until I'm sure it is safe but will use about as much as I did before | 16% | 16% |
| Will use less than I did before, for at least a few months | 6% | 7% |
| Will likely use less than I did before, permanently | 4% | 4% |
| I don't use this service | 62% | 61% |

e. Public transportation

| | Wave 1 | Wave 2 |
|--|--------|--------|
| Will start using again immediately and more than I did before | 3% | 3% |
| Will start using again immediately and about as much as I did before | 8% | 8% |
| Will wait until I'm sure it is safe but will use about as much as I did before | 17% | 17% |
| Will use less than I did before, for at least a few months | 7% | 7% |
| Will likely use less than I did before, permanently | 4% | 5% |
| I don't use this service | 61% | 59% |

f. Driving my personal vehicle

| | Wave 1 | Wave 2 |
|--|--------|--------|
| Will start using again immediately and more than I did before | 15% | 14% |
| Will start using again immediately and about as much as I did before | 46% | 48% |
| Will wait until I'm sure it is safe but will use about as much as I did before | 24% | 21% |
| Will use less than I did before, for at least a few months | 4% | 6% |
| Will likely use less than I did before, permanently | 1% | 2% |
| I don't use this service | 9% | 9% |





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- g. Telecommunications service locations (eg. Verizon store, AT&T Store, Best Buy Mobile Section)

| | Wave 1 | Wave 2 |
|--|--------|--------|
| Will start using again immediately and more than I did before | 6% | 4% |
| Will start using again immediately and about as much as I did before | 18% | 20% |
| Will wait until I'm sure it is safe but will use about as much as I did before | 31% | 29% |
| Will use less than I did before, for at least a few months | 10% | 8% |
| Will likely use less than I did before, permanently | 4% | 5% |
| I don't use this service | 31% | 34% |

- h. Religious centers/Churches

| | Wave 1 | Wave 2 |
|--|--------|--------|
| Will start using again immediately and more than I did before | 8% | 7% |
| Will start using again immediately and about as much as I did before | 20% | 22% |
| Will wait until I'm sure it is safe but will use about as much as I did before | 27% | 24% |
| Will use less than I did before, for at least a few months | 4% | 5% |
| Will likely use less than I did before, permanently | 3% | 3% |
| I don't use this service | 37% | 39% |

- i. Fitness centers/Studios/Gyms

| | Wave 1 | Wave 2 |
|--|--------|--------|
| Will start using again immediately and more than I did before | 7% | 6% |
| Will start using again immediately and about as much as I did before | 14% | 14% |
| Will wait until I'm sure it is safe but will use about as much as I did before | 22% | 20% |
| Will use less than I did before, for at least a few months | 7% | 7% |
| Will likely use less than I did before, permanently | 3% | 4% |
| I don't use this service | 47% | 49% |

- j. Entertainment centers (movie theaters, concerts)

| | Wave 1 | Wave 2 |
|--|--------|--------|
| Will start using again immediately and more than I did before | 7% | 6% |
| Will start using again immediately and about as much as I did before | 18% | 18% |
| Will wait until I'm sure it is safe but will use about as much as I did before | 40% | 36% |
| Will use less than I did before, for at least a few months | 12% | 15% |
| Will likely use less than I did before, permanently | 6% | 7% |
| I don't use this service | 17% | 18% |



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k. Shopping centers or malls

| | Wave 1 | Wave 2 |
|--|--------|--------|
| Will start using again immediately and more than I did before | 6% | 6% |
| Will start using again immediately and about as much as I did before | 21% | 21% |
| Will wait until I'm sure it is safe but will use about as much as I did before | 42% | 39% |
| Will use less than I did before, for at least a few months | 15% | 17% |
| Will likely use less than I did before, permanently | 6% | 6% |
| I don't use this service | 10% | 11% |

l. Grocery stores

| | Wave 1 | Wave 2 |
|--|--------|--------|
| Will start using again immediately and more than I did before | 10% | 9% |
| Will start using again immediately and about as much as I did before | 43% | 46% |
| Will wait until I'm sure it is safe but will use about as much as I did before | 36% | 35% |
| Will use less than I did before, for at least a few months | 8% | 8% |
| Will likely use less than I did before, permanently | 2% | 2% |
| I don't use this service | 1% | 1% |

15. For each product category below, what best describes your current situation?

a. Automobile

| | Wave 1 | Wave 2 |
|--|--------|--------|
| I am not in the market for this product | 74% | 75% |
| I have delayed shopping, and will wait for some time before I resume | 13% | 13% |
| I have delayed shopping, but will resume as soon as there is improvement in the crisis | 9% | 8% |
| I am still looking to make a purchase now | 4% | 4% |

b. Home

| | Wave 1 | Wave 2 |
|--|--------|--------|
| I am not in the market for this product | 75% | 75% |
| I have delayed shopping, and will wait for some time before I resume | 13% | 12% |
| I have delayed shopping, but will resume as soon as there is improvement in the crisis | 8% | 9% |
| I am still looking to make a purchase now | 4% | 4% |





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c. Tech equipment

| | Wave 1 | Wave 2 |
|--|--------|--------|
| I am not in the market for this product | 70% | 70% |
| I have delayed shopping, and will wait for some time before I resume | 16% | 16% |
| I have delayed shopping, but will resume as soon as there is improvement in the crisis | 9% | 8% |
| I am still looking to make a purchase now | 5% | 5% |

d. Mobile phone

| | Wave 1 | Wave 2 |
|--|--------|--------|
| I am not in the market for this product | 73% | 72% |
| I have delayed shopping, and will wait for some time before I resume | 13% | 12% |
| I have delayed shopping, but will resume as soon as there is improvement in the crisis | 10% | 10% |
| I am still looking to make a purchase now | 4% | 6% |

e. Home improvement

| | Wave 1 | Wave 2 |
|--|--------|--------|
| I am not in the market for this product | 53% | 60% |
| I have delayed shopping, and will wait for some time before I resume | 23% | 18% |
| I have delayed shopping, but will resume as soon as there is improvement in the crisis | 15% | 14% |
| I am still looking to make a purchase now | 9% | 9% |

f. Appliances

| | Wave 1 | Wave 2 |
|--|--------|--------|
| I am not in the market for this product | 71% | 73% |
| I have delayed shopping, and will wait for some time before I resume | 14% | 13% |
| I have delayed shopping, but will resume as soon as there is improvement in the crisis | 10% | 9% |
| I am still looking to make a purchase now | 5% | 5% |





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16. How much has your trust changed for the following industries as a result of COVID-19?

Increased Summary

| | Wave 1 | Wave 2 |
|--|--------|--------|
| Healthcare (hospitals and clinics) | 42% | 40% |
| Grocers | 37% | 37% |
| Food and Beverage Manufacturers | 24% | 22% |
| Pharmaceutical | 21% | 21% |
| Tech Platforms (Apple, Amazon, Google) | 20% | 19% |
| News Media | 19% | 20% |
| Government | 17% | 17% |
| Banking | 16% | 15% |
| Social Media | 16% | 16% |
| Telecom | 13% | 11% |
| Oil and Natural Gas | 12% | 11% |
| Airlines | 11% | 10% |
| Automotive | 10% | 10% |

a. Automotive

| | Wave 1 | Wave 2 |
|-------------------------|------------|------------|
| Increased significantly | 4% | 2% |
| Increased somewhat | 7% | 8% |
| No change in trust | 82% | 82% |
| Decreased somewhat | 6% | 6% |
| Decreased significantly | 2% | 2% |
| <i>Increased (Net)</i> | <i>10%</i> | <i>10%</i> |
| <i>Decreased (Net)</i> | <i>8%</i> | <i>8%</i> |

b. Banking

| | Wave 1 | Wave 2 |
|-------------------------|------------|------------|
| Increased significantly | 5% | 3% |
| Increased somewhat | 12% | 12% |
| No change in trust | 75% | 77% |
| Decreased somewhat | 6% | 6% |
| Decreased significantly | 2% | 2% |
| <i>Increased (Net)</i> | <i>16%</i> | <i>15%</i> |
| <i>Decreased (Net)</i> | <i>9%</i> | <i>8%</i> |



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c. Government

| | Wave 1 | Wave 2 |
|-------------------------|------------|------------|
| Increased significantly | 6% | 4% |
| Increased somewhat | 11% | 13% |
| No change in trust | 38% | 40% |
| Decreased somewhat | 28% | 27% |
| Decreased significantly | 17% | 16% |
| <i>Increased (Net)</i> | <i>17%</i> | <i>17%</i> |
| <i>Decreased (Net)</i> | <i>45%</i> | <i>43%</i> |

d. News Media

| | Wave 1 | Wave 2 |
|-------------------------|------------|------------|
| Increased significantly | 6% | 6% |
| Increased somewhat | 13% | 14% |
| No change in trust | 48% | 49% |
| Decreased somewhat | 19% | 21% |
| Decreased significantly | 15% | 10% |
| <i>Increased (Net)</i> | <i>19%</i> | <i>20%</i> |
| <i>Decreased (Net)</i> | <i>34%</i> | <i>31%</i> |

e. Oil and Natural Gas

| | Wave 1 | Wave 2 |
|-------------------------|------------|------------|
| Increased significantly | 5% | 2% |
| Increased somewhat | 8% | 9% |
| No change in trust | 77% | 78% |
| Decreased somewhat | 8% | 7% |
| Decreased significantly | 2% | 3% |
| <i>Increased (Net)</i> | <i>12%</i> | <i>11%</i> |
| <i>Decreased (Net)</i> | <i>10%</i> | <i>10%</i> |

f. Pharmaceutical

| | Wave 1 | Wave 2 |
|-------------------------|------------|------------|
| Increased significantly | 7% | 6% |
| Increased somewhat | 14% | 15% |
| No change in trust | 65% | 66% |
| Decreased somewhat | 10% | 9% |
| Decreased significantly | 4% | 4% |
| <i>Increased (Net)</i> | <i>21%</i> | <i>21%</i> |
| <i>Decreased (Net)</i> | <i>14%</i> | <i>13%</i> |





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g. Social Media

| | Wave 1 | Wave 2 |
|-------------------------|------------|------------|
| Increased significantly | 7% | 5% |
| Increased somewhat | 10% | 11% |
| No change in trust | 64% | 61% |
| Decreased somewhat | 13% | 17% |
| Decreased significantly | 6% | 6% |
| Increased (Net) | 16% | 16% |
| Decreased (Net) | 20% | 23% |

h. Airlines

| | Wave 1 | Wave 2 |
|-------------------------|------------|------------|
| Increased significantly | 4% | 2% |
| Increased somewhat | 7% | 8% |
| No change in trust | 66% | 69% |
| Decreased somewhat | 15% | 15% |
| Decreased significantly | 9% | 6% |
| <i>Increased (Net)</i> | <i>11%</i> | <i>10%</i> |
| <i>Decreased (Net)</i> | <i>24%</i> | <i>21%</i> |

i. Grocers

| | Wave 1 | Wave 2 |
|-------------------------|------------|------------|
| Increased significantly | 11% | 12% |
| Increased somewhat | 26% | 25% |
| No change in trust | 54% | 55% |
| Decreased somewhat | 8% | 7% |
| Decreased significantly | 2% | 2% |
| <i>Increased (Net)</i> | <i>37%</i> | <i>37%</i> |
| <i>Decreased (Net)</i> | <i>10%</i> | <i>8%</i> |

j. Healthcare (hospitals and clinics)

| | Wave 1 | Wave 2 |
|-------------------------|------------|------------|
| Increased significantly | 18% | 17% |
| Increased somewhat | 24% | 23% |
| No change in trust | 45% | 50% |
| Decreased somewhat | 10% | 8% |
| Decreased significantly | 2% | 2% |
| <i>Increased (Net)</i> | <i>42%</i> | <i>40%</i> |
| <i>Decreased (Net)</i> | <i>12%</i> | <i>11%</i> |





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k. Tech Platforms (Apple, Amazon, Google)

| | Wave 1 | Wave 2 |
|-------------------------|---------------|---------------|
| Increased significantly | 7% | 5% |
| Increased somewhat | 13% | 14% |
| No change in trust | 71% | 71% |
| Decreased somewhat | 7% | 7% |
| Decreased significantly | 2% | 3% |
| <i>Increased (Net)</i> | <i>20%</i> | <i>19%</i> |
| <i>Decreased (Net)</i> | <i>10%</i> | <i>10%</i> |

l. Telecom

| | Wave 1 | Wave 2 |
|-------------------------|---------------|---------------|
| Increased significantly | 4% | 3% |
| Increased somewhat | 8% | 8% |
| No change in trust | 79% | 81% |
| Decreased somewhat | 6% | 7% |
| Decreased significantly | 2% | 2% |
| <i>Increased (Net)</i> | <i>13%</i> | <i>11%</i> |
| <i>Decreased (Net)</i> | <i>9%</i> | <i>9%</i> |

m. Food and Beverage Manufacturers

| | Wave 1 | Wave 2 |
|-------------------------|---------------|---------------|
| Increased significantly | 6% | 5% |
| Increased somewhat | 18% | 17% |
| No change in trust | 67% | 69% |
| Decreased somewhat | 8% | 7% |
| Decreased significantly | 1% | 2% |
| <i>Increased (Net)</i> | <i>24%</i> | <i>22%</i> |
| <i>Decreased (Net)</i> | <i>9%</i> | <i>9%</i> |





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17. How much have the following influenced your decision to engage with, or purchase products from, a brand in the current environment? Please select your Top 3.

| | Wave 1 | Wave 2 |
|---|---------------|---------------|
| Keep employees and customers safe | 45% | 42% |
| Protection of jobs in their company | 26% | 25% |
| Support employees with adequate healthcare benefits | 22% | 22% |
| Charitable donations and giving back to the community | 17% | 15% |
| New products/services that are relevant to you at this time | 16% | 16% |
| Short term payment relief for existing customers | 14% | 13% |
| Making working with them online easier | 13% | 14% |
| Business practices that protect the environment | 10% | 10% |
| Taking a stance on political issues | 8% | 8% |
| Equality of opportunity across gender and ethnicity | 7% | 10% |
| Action to achieve equal pay | 7% | 7% |
| Action in support of diversity and inclusion | 6% | 6% |
| None of the above | 28% | 29% |





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18. What matters MORE to you now than before the coronavirus crisis began? (Select all that apply)

| | Wave 1 | Wave 2 |
|-------------------|---------------|---------------|
| Family | 47% | 45% |
| Safety | 47% | 46% |
| Physical health | 43% | 44% |
| Friendship | 34% | 31% |
| Kindness | 34% | 31% |
| Mental health | 33% | 32% |
| Happiness | 30% | 28% |
| Trust | 28% | 27% |
| Community | 25% | 25% |
| Calm | 23% | 18% |
| Comfort | 22% | 20% |
| Finances | 21% | 23% |
| Back to Basics | 21% | 21% |
| Sustainability | 19% | 19% |
| Convenience | 18% | 17% |
| Value | 15% | 14% |
| Fairness | 15% | 16% |
| Quality | 15% | 16% |
| Experiences | 14% | 15% |
| Local | 14% | 12% |
| Privacy | 13% | 11% |
| Global warming | 9% | 10% |
| Variety | 7% | 7% |
| Inclusivity | 6% | 7% |
| Indulgence | 4% | 3% |
| Possessions | 4% | 3% |
| None of the above | 9% | 9% |



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About the Study

These are some of the findings of the second wave of an Ipsos poll conducted between April 17-20, 2020. For this survey, a sample of roughly 1,111 adults age 18+ from the continental U.S. Alaska and Hawaii was interviewed online in English. The first wave was conducted between April 10-13, 2020. For the first wave, a sample of roughly 1,114 adults age 18+ from the continental U.S. Alaska and Hawaii was interviewed online in English.

The sample for this study was randomly drawn from Ipsos' online panel (see link below for more info on "Access Panels and Recruitment"), partner online panel sources, and "river" sampling (see link below for more info on the Ipsos "Ampario Overview" sample method) and does not rely on a population frame in the traditional sense. Ipsos uses fixed sample targets, unique to each study, in drawing a sample. After a sample has been obtained from the Ipsos panel, Ipsos calibrates respondent characteristics to be representative of the U.S. Population using standard procedures such as raking-ratio adjustments. The source of these population targets is U.S. Census 2016 American Community Survey data. The sample drawn for this study reflects fixed sample targets on demographics. Post-hoc weights were made to the population characteristics on gender, age, race/ethnicity, region, and education.

Statistical margins of error are not applicable to online non-probability polls. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. Where figures do not sum to 100, this is due to the effects of rounding. The precision of Ipsos online polls is measured using a credibility interval. In this case, the poll has a credibility interval of plus or minus 3.4 percentage points for all respondents. Ipsos calculates a design effect (DEFF) for each study based on the variation of the weights, following the formula of Kish (1965). This study had a credibility interval adjusted for design effect of the following (n=1,111, DEFF=1.5, adjusted Confidence Interval=+/-4.9 percentage points).

The first wave of this study has a credibility interval of plus or minus 3.3 percentage points for all respondents. Ipsos calculates a design effect (DEFF) for each study based on the variation of the weights, following the formula of Kish (1965). This study had a credibility interval adjusted for design effect of the following (n=1,114, DEFF=1.5, adjusted Confidence Interval=+/-4.8 percentage points).

For more information on this news release, please contact:

Chris Jackson
Vice President, US
Public Affairs
+1 202 420-2025
chris.jackson@ipsos.com

Mallory Newall
Director, US
Public Affairs
+1 202 420-2014
mallory.newall@ipsos.com





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About Ipsos

Ipsos is the world's third largest market research company, present in 90 markets and employing more than 18,000 people.

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