

To: Interested Parties

From: Heart+Mind Strategies

Date: April 13, 2020

Subject: Summary of Findings – Heart+Mind Strategies Coronavirus Poll – Wave 4

Methodology

Heart+Mind Strategies' Coronavirus Tracking Poll fielded its fourth wave April 8-9, 2020 using an online, opt-in panel. In total, a sample of n=1,001 interviews were conducted. Quotas were used to ensure a representative population on age, gender, ethnicity and region.

Wave 1 was conducted March 18-19, 2020 with a total sample of n=1,035.

Wave 2 was conducted March 25-26, 2020 with a total sample of n=1,006.

Wave 3 was conducted April 1-2, 2020 with a total sample of n=1,000.

This was an online quantitative survey. If we were to estimate a margin of error, it would be +/- 3.1% at 95% confidence. All polls have varying degrees of error that should always be considered when interpreting results.

Common Question Key Findings

Overview

- The number of Americans checking the news multiple times a day for coronavirus updates is down significantly from last week (33%, -9) and daily news consumption is also down (73%, -5). (Q200)
 - Many in Generation Z have shifted from checking the news multiple times a day to just once – while the number checking at least daily is steady (50%, -1), the number checking multiple times a day has fallen 8 points (13%, -8).
 - Generation X is also cutting back on daily coronavirus news consumption (72%, -10).
 - Republicans are also consuming less coronavirus news multiple times per day (35%, -12).
- For the first time we see a dip in the number of people thinking it's a real threat
- The number of Americans who believe coronavirus is a real threat is down for the first time since Heart+Mind Strategies began tracking in mid-March (79%, -4). (Q231)

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- Generation Z (61%, -13) and Boomers (84%, -7) saw the largest drops in numbers who believe the virus outbreak is a “real threat.”
- Republicans are also waning in their belief that the virus represents a real threat (74%, -9).
- Americans are unchanged on their opinion of the federal legislation aimed at easing hardships during the coronavirus outbreak. Just over one-thirds (36%, +2) believe the legislation will have a significant positive impact and another one-third (33%, -1) believe it will have a moderate impact. (Q202)

Economy

- Over one-third of small business owners (36%) anticipate their 2020 revenue will be down 50% or more due to the coronavirus outbreak. Just 17% predict no impact. (Q1096A)
 - Almost one-quarter (23%) of small businesses believe their revenue will be down 50% or more over the next three years because of the current public health crisis. (Q1096B)
- Similar to last week, roughly half of Americans (49%, -2) believe we need to focus on the public health aspect of the coronavirus crisis first and foremost. Four-in-ten (40%, +2) believe we must balance health and economic concerns. (Q232)
 - Generation Z is warming to the idea that public health and economic concerns must be balanced (46%, +8).
 - Republicans are still significantly more likely to believe a balance of health and economic issues must be considered (48%, compared to Democrats 34%) but are down three points this week.
 - Political Independents are somewhat more likely to be interested in balancing public health and economic concerns compared to last week (32%, +5).
- There is a slight increase (+3) in the number of Americans who believe the economic impact of COVID-19 will last seven months or longer (61%). This figure has steadily been on the rise since the first wave in mid-March (55%).

Behavior

- There has been a significant uptick in the number of Americans planning out of home activities, showing early signs that quarantined life might be starting to get to people. (Q400)
 - One-in-five (21%) are planning personal travel (+8). A similar number, 22%, plan to dine out in the next two weeks (+6) and 21% see themselves attending a worship service (+6).

- While absolute figures remain low, there has been a 6-point jump in the number who plan to socialize in a group of more than ten people (17%, +6) and a four-point increase in those planning to go to a gym (16%, +4).
- In most cases, jumps are being driven by Millennials.

Human Element

- There has been no change in the number of Americans who believe the coronavirus outbreak is bringing us closer together (53%) compared to last week. (Q230)
 - Although there have been no changes at the overall level, certain subgroups moved significantly on this question since last week. Generation Z (39%) is nine points more likely to say we are more united (+9). Millennials are less likely to feel more united in this crisis (43%), -4).
 - There have been no significant shifts based on political ideology.
- Fearful emotions are on the rise this week while hope has remained consistent since last week.
 - Half of Americans describe themselves as worried (50%, -6) down significantly from previous figures.
 - Those who feel hopeful are significantly more likely to feel that way because of a perceived improvement in conditions (25%, +8) although the government is getting less credit for those improvements (“actions of government leaders have made me hopeful 29%, -4).
 - The number of Americans saying they feel Afraid or Scared has dropped 4 points since last week (38%).
 - Anxiety is also down since one week ago (40%, -4).
 - Hope remains constant with 32% of the Americans feeling hopeful in the current outbreak situation.

Trust in Institutions

- Increased trust in institutions may have been a blip last week as trust numbers fell for a variety of types of organizations. (Q500)
 - Health and medical organizations saw the largest drops in trust but remain the most trusted organizations tested.
 - CDC (55%, -6), Local Medical community (48%, -7), WHO (46%, -9)
 - Governments, which enjoyed an uptick in trust last week likely to due to increased action on economic relief, dipped this week.
 - Federal Government (30%, -5), Local/City Government (39%, -4), State Government (including Governor) (42%, -2).
 - Trust in media is low but largely steady from last week.
 - Broadcast News Media (29%, -2), Newspapers and Magazines (26%, -2).