Heart+Mind Pulse℠

Expectations, Emotions, and Segments:

The Effect of Rising COVID-19 Cases on Consumer Confidence

July 2020

Mike Dabadie
CEO and Managing Partner
Expectations
Three Quarters Expect a Second Shelter-in-Place Order

Q: How likely do you think it is that the United States will see a second wave of coronavirus cases in the fall that shuts down the economy again and leads to new stay-at-home and shelter-in-place orders?

Q: How likely do you think it is that your state will see a spike in coronavirus cases that leads to a second shelter-in-place or stay-at-home order?

Source: Heart+Mind Strategies CV-19 Tracking; July 2020
Behavioral Changes to Life are Expected to Be Permanent

83% of those living in Urban areas are expecting permanent routine changes as a result of COVID-19. More than most to expect longer-term change in cooking, exercise, work/home life balance, hobbies, tech and online tools, education, and parenting.

MORE LIKELY TO NOT EXPECT CHANGES:
Boomers, Silent Generation, Conservative GOP, Suburban/Rural, No Job Impact Yet,

Do Not Expect Any Permanent Routine Changes

29%

Expect Some Permanent Routine Changes

71%
New Routines Forming That Could Last Longer

90% miss at least one of their routines

71% expect to have some of these new routines to change permanently

New Routines Developed

Routines Missed the Most

Eating/Cooking
Exercising
Connecting with family
Connecting with friends
Entertaining myself
Travel
Getting work done
Managing mental health
Managing physical health
Using technology
Managing finances
Balancing work & home
Practicing faith/spirituality
Parenting
Educating children
Pursuing hobbies
Learning

Size of marker indicates percentage of consumers who expect routines to change permanently

Source: Heart+Mind Strategies CV-19 Tracking; May to July 2020
Balance Wins Out

Smith believes we must **balance public health concerns with economic concerns**. A complete collapse of our economy and financial systems creates its own public health concerns.

Jones: We must put **all of our energy and resources into protecting public health**. If there are consequences of that focus, we will deal with them after we have contained the coronavirus.

- **54%**
  - Male
  - Gen Z
  - Young Millennial
  - Child at Home
  - GOP
  - Conservative
  - Moderate
  - Lower Income

- **46%**
Some are making a Trade-off: Rationally and Emotionally; Attitudinally and Behaviorally

Open the Country/My State; Lift Restrictions

Likely that US will have second wave of CV-19

Likely US economy will shutdown again

Even though Americans believe that a second wave will happen and that the economy is likely to shut down again, some are willing to take on more personal risk.
Work Is Expected to Return Well in Advance of Childcare; Moms Growing Anxious and Stressed

Q: When are you likely to do each of the following?

- **Return to work**
  - Next Week: 21%
  - Next Month: 17%
  - 2-3 Months: 20%
  - 4-6 Months: 18%
  - 7-12 Months: 14%
  - More than Year: 10%

- **Let kid return to daycare**
  - Next Week: 10%
  - Next Month: 13%
  - 2-3 Months: 20%
  - 4-6 Months: 19%
  - 7-12 Months: 20%
  - More than Year: 16%

- **Let kid return to school**
  - Next Week: 7%
  - Next Month: 14%
  - 2-3 Months: 25%
  - 4-6 Months: 20%
  - 7-12 Months: 17%
  - More than Year: 17%

Source: Heart+Mind Strategies CV-19 Tracking; July 2020
## What Employees Expect at Work

### Health and Safety Practices

<table>
<thead>
<tr>
<th>Health and Safety Practices</th>
<th>Must Have</th>
<th>Nice to Have</th>
<th>My Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Require wearing face masks</td>
<td>●</td>
<td></td>
<td>●</td>
</tr>
<tr>
<td>Require social distancing</td>
<td>●</td>
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<td>●</td>
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<tr>
<td>Flexibility to work remotely</td>
<td></td>
<td>●</td>
<td>●</td>
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<tr>
<td>Provide temperature checks</td>
<td>●</td>
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<td>●</td>
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<tr>
<td>Frequent sanitizing – especially common areas</td>
<td>●</td>
<td></td>
<td>●</td>
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<tr>
<td>Regular handwashing</td>
<td></td>
<td></td>
<td>●</td>
</tr>
<tr>
<td>Sanitizing stations/Hand sanitizer/Wipes</td>
<td>●</td>
<td></td>
<td>●</td>
</tr>
<tr>
<td>Provide PPE</td>
<td>●</td>
<td></td>
<td></td>
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<tr>
<td>Provide safety/CDC guidelines</td>
<td>●</td>
<td></td>
<td></td>
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<tr>
<td>Encourage sick days/quarantine</td>
<td></td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Plexiglass barriers between desks/customers</td>
<td>●</td>
<td></td>
<td></td>
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<tr>
<td>Reduce capacity at office/onsite locations</td>
<td>●</td>
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<tr>
<td>Provide gloves</td>
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<td></td>
<td>●</td>
</tr>
<tr>
<td>Offer mental health days</td>
<td></td>
<td>●</td>
<td></td>
</tr>
<tr>
<td>Offer COVID-19 testing</td>
<td></td>
<td>●</td>
<td></td>
</tr>
<tr>
<td>Flexible work schedules</td>
<td></td>
<td>●</td>
<td></td>
</tr>
</tbody>
</table>

“Separate our cubes so they aren't so close together or add some type of plexiglass barrier. Provide masks and hand sanitizer. Clean and disinfect the area regularly.”

"I am responsible for my health, for making sure my area is clean and sanitized even if the cleaning crew has already done so during after-hours. I'm also responsible for washing and sanitizing my hands on a regular basis. Wearing a mask is my responsibility regardless if my employer requires it or not to keep me and my fellow workers safe."
Masks Usage by Country: US at 73%

Selected countries: % of people who say they wear face masks

- Singapore: 90%
- Japan: 86%
- France: 78%
- US: 73%
- UK: 36%
- Australia: 20%

Data is based on a poll of at least 1,000 adults in each country

Source: YouGov

Attitudes vs Behavior:

Our observational and ethnographic results suggest that consistent mask usage is no more than 50% in the US.
Expectation Section/Q&A:
1. Communicate What to Expect
2. Be Realistic and Honest
3. Manage
Emotions
Concern for Others Down Significantly; Security, Social Order, Freedom are Worse

Getting Worse

-31 Security
-27 Social Order
-27 Freedom
-24 Productivity
-14 Sense of Belonging
-14 Well-Being
-11 Accomplishment
-9 Enjoyment
-8 Tolerance
-8 Inclusiveness
-8 Peace of Mind
-7 Fulfillment
-6 Self-esteem
-6 Satisfaction
-6 Success
-6 Happiness
-6 Pride

Getting Better

Concern for others

Dependability

Source: Heart+Mind Strategies CV-19 Tracking; June to July 2020
Human Needs and Values are Being Compromised: Safety, Freedom, Peace of Mind Taken Away

Please indicate the extent to which the coronavirus pandemic is currently impacting each of these.

Source: Heart+Mind Strategies CV-19 Tracking
Source: Crosby Textor May to June 2020
Q: Overall, would you say the outbreak of the coronavirus is bringing our communities and the people in our country closer together and making us more unified, or is it driving us further apart and making us more divided?
Inequality Issue is Real to Americans: It’s about Human Mistreatment Assessed Against a Moral Framework of Systems Injustice

- 81% - Believe we need to continue making changes to treat Blacks equally to Whites
- 74% - Support protests following Floyd’s killing
- 69% - George Floyd incident sign of broader problems
- 67% - Believe criminal justice system favors Whites
- 67% - Believe racism is a big problem in our society today
- 57% - Believe police more likely to use force against Blacks

Source: Heart+Mind Strategies CV-19 Tracking; June 2020
African Americans Express Positive Emotions; Whites Negative Emotions

Q: Please select the words below that best describe the way you feel right now in light of current events.

![Bar chart showing the percentage of Hopeful, Optimistic, Concerned, and Worried feelings for Caucasian and African American participants.]

Source: Heart+Mind Strategies CV-19 Tracking; June 2020
Are Boycotts and Punishing Brands More Likely than Rewarding a Brand?

- While people say they want to do the socially good thing, if they do not see enough benefit for themselves, they will revert to what's best for them.

- Is their decision going to make enough of a difference if others aren't also making that decision? #FOMO can cause doing what’s socially acceptable.

- Behavioral data shows that it’s more likely consumers will actually avoid brands/causes that don’t align with their values vs going out of their way to reward brands/causes.

- Punishing a brand is more likely than rewarding a brand.

Source: Ad Age July 2020

Source: Heart+Mind Strategies
Emotion Section/Q&A:
1. Values: Individualism & Collectivism
2. Humans, Systems, Moral Frameworks
3. Being Authentic
Segments
New Consumer Segments Stable Over 15 Weeks

Hopeful Optimists
- 23%
- 64% Male
- 60% Reopen now
- 50% Kids at home
- +12 Trump over Biden
- Young Millennial, Silent
- Strong positive emotions
- Travel: Risk Takers, Faint Signals

Concerned Realists
- 54%
- 50% Male/Female
- 50% Reopen now/Stay closed
- Skew Multicultural
- +1 Biden over Trump
- Gen Z, Gen X
- Balance of emotions
- Travel: Cautiously Curious; Moderate Signals

Anxious Worriers
- 23%
- 80% White
- 69% Female
- 67% Stay closed
- 23% Unemployed
- +22 Biden over Trump
- Older Millennial
- Strong negative emotions
- Travel: Wait and See; Needs Full Permission

Source: Heart+Mind Strategies CV-19 Tracking July 2020
Hopeful Optimists Highest in Mountain/South

Showing % Hopeful Optimists

- Pacific/West (20%)
- Mountain (23%)
- West North Central (19%)
- East North Central (20%)
- Mid-Atlantic (21%)
- South Atlantic (22%)
- East South Central (25%)

Most Hopeful Optimists

Moderate

Fewest Hopeful Optimists

Source: Heart+Mind Strategies CV-19 Tracking July 2020
Concerned Realists Everywhere, Central Highest

Showing % Concerned Realists

Source: Heart+Mind Strategies CV-19 Tracking July 2020
Anxious Worriers Highest Northeast and Coasts

Showing % Anxious Warriors

- Pacific/West (35%)
- Mountain (25%)
- West North Central (27%)
- East North Central (31%)
- East South Central (29%)
- West South Central (27%)
- West South Central (29%)
- Mountain (25%)
- Pacific/West (35%)

Most Anxious Worriers

- New England (39%)
- Mid-Atlantic (39%)
- South Atlantic (34%)

Fewest Anxious Worriers

Source: Heart+Mind Strategies CV-19 Tracking July 2020
COVID-19 Emotional Response Segment Index By Region – Too Optimistic?

**Showing Emotional Response Index**

- Pacific/West (47.6)
- Mountain (54.7)
- West North Central (52.0)
- East North Central (49.3)
- East South Central (53.0)
- West South Central (51.9)
- New England (43.2)
- Mid-Atlantic (45.7)
- South Atlantic (48.6)

Optimism

Moderate

Worried

Source: Heart+Mind Strategies CV-19 Tracking July 2020
Worker Segments: Corporate America Response

Business has work to do to consistently engage and engender trust among stakeholders.

Q: Overall, how would you rate businesses and organizations in their response to the coronavirus crisis?

Source: Heart+Mind Strategies CV-19 Tracking
In Contrast, Federal Gov’t Trust Declines to Lowest Point

% Trust Completely / A Great Deal

66% confused by messages from federal government

Source: Heart+Mind Strategies CV-19 Tracking
What Impacts Trust In Employer?

Trust in employer as a source of information

- 15%
- 20%
- 33%
- 15%
- 18%

35% Trust Completely/Great Deal

Source: Heart+Mind Strategies. Base: All Qualified Respondents (n=1,009) / Employed (n=571)

Q. How much trust do you have in the following sources of information? / There are many things that may impact trust in your employer. For you, which of the following have the most impact on the degree of trust you have in your employer? Please rank your top 3 choices.
Segment Section/Q&A:
1. New Segment Applications for your Brand
2. Keep Curiosity Alive – Journey Planning
3. Building Trust
Thank you
Appendix
Implications:
Our Top 10
1. Nothing is settled yet. We are not in a “new normal” yet. Don’t plan and don’t communicate like it is.

Manage expectations.
2. Adapt and act. Don’t be afraid to fail with some. Thoughtful action matters right now. You have a real window to innovate - seek opportunity and not only to manage risk. Start Recovery Planning now.
3. But keep your eye on the long-term impact. Short-term, quick fixes are not enough.
4. Your focus should be on adapting to “living with the virus” rather than “surviving”. Consider how that framing shifts the way you see your role in the solutions you deploy.
5. Macro to micro matters. Needs and reactions can vary widely. Understand the segments that matter in your sector how you need to adapt in delivery in different situations.
6. Most of the country will take a concerned realist approach to the crisis (54%). The rest will emotionally respond in polar opposites - anxiously worried OR hopefully optimistic. This has been the only constant in our data. Find your people on this spectrum and adapt accordingly.
7. Discover how the fundamentals of the human journey are changing right now in your space (needs, process, and expectations). Map solutions against the **role** your brand can play to help people pursue what they are after in a way that is unique and authentic to who and what you are.
8. Acceleration to digital is obvious. But it isn’t that simple. And it doesn’t work for everyone, especially generational realities. Consider the full experience as you rapidly deploy. Both matter.
9. Anger is building. Know where your employees stand. Increase listening posts and provide safe and meaningful outlets for civil dialogue. We’re missing it in most of our institutions. Fill that gap.
10. We are facing big issues we won’t solve. But there may be ways to boost a sense of belonging or a respite for peace of mind in the slice of life you control. Find ways to meaningfully help people feel understood. Do it. Don’t say it.
Where Employees Are Working

Work environment

- Before COVID-19 I worked primarily from a home office and still do: 18%
- I shifted to working from home full time due to COVID-19: 29%
- I work primarily at the physical location of my employer: 31%
- I work primarily outside of my home at various employer or customer locations: 10%

47% Working From Home

Work From Home more likely among College Graduates, 100k+ Income, Gen X, Males 35-54

Source: Heart+Mind Strategies. Data base: Employed or Looking (n=662)
Q. Which of the following best describes your work environment? In your current line of work, how often do you work in a traditional office setting, including your offices of your employer, clients or vendors?
How Employee Values Are Shifting

Getting Worse

Employee sense of Accomplishment, Self-Esteem, Pride stronger than public at large.


Getting Better

Source: Heart+Mind Strategies. Base: Employed (n=571)

Q. Please select the words below that best describe the way you feel right now in light of current events.
Following another week of intense media scrutiny, the British government continues its downwards slide for its response to the pandemic. On the other hand, Australia’s response rooted in managing expectations especially from the fires experience.
## Healthcare Tops List of Most Important Issues

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Trump Voters</th>
<th>Biden Voters</th>
<th>Undecided Voters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Healthcare</td>
<td>41%</td>
<td>33%</td>
<td>51%</td>
<td>37%</td>
</tr>
<tr>
<td>Economy</td>
<td>34%</td>
<td>38%</td>
<td>28%</td>
<td>40%</td>
</tr>
<tr>
<td>Jobs/unemployment</td>
<td>28%</td>
<td>30%</td>
<td>23%</td>
<td>28%</td>
</tr>
<tr>
<td>Race relations</td>
<td>23%</td>
<td>13%</td>
<td>32%</td>
<td>20%</td>
</tr>
<tr>
<td>Government corruption</td>
<td>18%</td>
<td>20%</td>
<td>19%</td>
<td>20%</td>
</tr>
<tr>
<td>Education</td>
<td>16%</td>
<td>16%</td>
<td>13%</td>
<td>14%</td>
</tr>
<tr>
<td>National security</td>
<td>15%</td>
<td>23%</td>
<td>10%</td>
<td>17%</td>
</tr>
<tr>
<td>Immigration</td>
<td>15%</td>
<td>24%</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>High cost of living</td>
<td>14%</td>
<td>12%</td>
<td>14%</td>
<td>15%</td>
</tr>
<tr>
<td>Crime</td>
<td>14%</td>
<td>17%</td>
<td>10%</td>
<td>15%</td>
</tr>
<tr>
<td>Income inequality</td>
<td>13%</td>
<td>9%</td>
<td>16%</td>
<td>12%</td>
</tr>
<tr>
<td>Environmental issues/climate change</td>
<td>13%</td>
<td>7%</td>
<td>19%</td>
<td>12%</td>
</tr>
<tr>
<td>Guns</td>
<td>9%</td>
<td>7%</td>
<td>13%</td>
<td>11%</td>
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<tr>
<td>Federal debt/deficit</td>
<td>9%</td>
<td>10%</td>
<td>7%</td>
<td>9%</td>
</tr>
<tr>
<td>Criminal justice reform</td>
<td>9%</td>
<td>5%</td>
<td>11%</td>
<td>18%</td>
</tr>
<tr>
<td>Gender equality</td>
<td>7%</td>
<td>8%</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Abortion</td>
<td>7%</td>
<td>11%</td>
<td>4%</td>
<td>9%</td>
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<tr>
<td>Foreign relations</td>
<td>6%</td>
<td>7%</td>
<td>5%</td>
<td>1%</td>
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<tr>
<td>Judicial system/courts</td>
<td>5%</td>
<td>6%</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Corporate corruption</td>
<td>5%</td>
<td>5%</td>
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<td>5%</td>
</tr>
</tbody>
</table>
# Fears about Coronavirus

For each of the following, please select which aspect of the coronavirus pandemic worries you the most, and which aspect worries you the least.

<table>
<thead>
<tr>
<th>W1</th>
<th>W9</th>
</tr>
</thead>
<tbody>
<tr>
<td>Somebody you care about catching Coronavirus</td>
<td>Somebody you care about catching Coronavirus</td>
</tr>
<tr>
<td>The health system not being able to cope</td>
<td>Catching Coronavirus yourself</td>
</tr>
<tr>
<td>Losing your job</td>
<td>Long-term damage to the economy</td>
</tr>
<tr>
<td>My government’s ability to curb the pandemic</td>
<td>The stability of your financial situation</td>
</tr>
<tr>
<td>Not knowing how long the Coronavirus pandemic will last</td>
<td>Losing your job</td>
</tr>
<tr>
<td>Catching Coronavirus yourself</td>
<td>Not knowing how long the Coronavirus pandemic will last</td>
</tr>
<tr>
<td>Local shops going out of business</td>
<td>The health system not being able to cope</td>
</tr>
<tr>
<td>The financial situation of people you care about</td>
<td>The financial situation of people you care about</td>
</tr>
<tr>
<td><strong>The stability of your financial situation</strong></td>
<td><strong>Losing your job</strong></td>
</tr>
<tr>
<td>Long-term damage to the economy</td>
<td><strong>My government’s ability to curb the pandemic</strong></td>
</tr>
<tr>
<td>Food supplies and home essentials running out</td>
<td>.05</td>
</tr>
<tr>
<td>Having to stay at home for a long time</td>
<td>.05</td>
</tr>
<tr>
<td>Not knowing whether you have had the virus or not</td>
<td>.05</td>
</tr>
</tbody>
</table>

Source: Crosby Textor.

People have strongly refocused their concerns on the economy, but core fears have remained in place despite some uptick in economic outlook.

For each of the following, please select which aspect of the coronavirus pandemic worries you the most, and which aspect worries you the least.
## Relative Support and Impact Differ for Corporate Initiatives

<table>
<thead>
<tr>
<th>Initiative</th>
<th>Support Rank</th>
<th>Impact Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Require training on racial discrimination for law enforcement agencies.</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Authorize state attorneys general to investigate and hold accountable departments engaged in a perceived pattern of practice or abuse.</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Encourage greater integration between law enforcement and mental health experts so that police can avoid escalation when responding to medical, mental health, or welfare calls.</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Encourage and support individual learning and growth on racial discrimination and related topics</td>
<td>4</td>
<td>7</td>
</tr>
<tr>
<td>Have companies and brands take action to reduce social and racial injustice.</td>
<td>5</td>
<td>9</td>
</tr>
<tr>
<td>End practices written into current police union contracts, including allowing officers to receive paid leave or paid desk-duty after being charged with a felony offense and prohibiting civilians from having the power to discipline, subpoena or interrogate police officers.</td>
<td>6</td>
<td>3</td>
</tr>
<tr>
<td>Encourage companies to increase diversity initiatives</td>
<td>7</td>
<td>11</td>
</tr>
<tr>
<td>Curtail police union political contributions so that they have less influence over local policy makers who are supposed to provide oversight</td>
<td>8</td>
<td>13</td>
</tr>
<tr>
<td>End ‘stop-and-frisk’ policies that allow police to temporarily detain, search and question people on the street.</td>
<td>9</td>
<td>6</td>
</tr>
<tr>
<td>End Qualified Immunity, which is legal doctrine in United States federal law that shields government officials, and specifically law enforcement, from being sued for discretionary actions performed within their official capacity.</td>
<td>10</td>
<td>4</td>
</tr>
<tr>
<td>Establish Universal Basic Income, which provides a set monthly payment to all Americans regardless of their income level.</td>
<td>11</td>
<td>8</td>
</tr>
<tr>
<td>End the federal funding program that encourages police department purchase of military grade equipment</td>
<td>12</td>
<td>10</td>
</tr>
<tr>
<td>End asset forfeiture, which are programs that allow local law enforcement agencies to seize and keep assets (money, cars, guns) recovered during arrests.</td>
<td>13</td>
<td>15</td>
</tr>
<tr>
<td>Consumer boycotts of companies and brands that do not proactively take action to reduce social and racial injustice.</td>
<td>14</td>
<td>14</td>
</tr>
<tr>
<td>Eliminate police unions</td>
<td>15</td>
<td>12</td>
</tr>
<tr>
<td>Eliminate traditional police forces and replace them with community task forces</td>
<td>16</td>
<td>16</td>
</tr>
</tbody>
</table>
Support and Perceived Impact

- End asset forfeiture
- Consumer boycotts
- Eliminate traditional police forces
- Curtail police union political contributions
- Companies and brands take action
- Company Diversity Initiatives
- End ‘stop-and-frisk’ policies
- Establish Universal Basic Income
- Eliminate police unions
- End police department purchase of military equipment
- Individual Growth and Learning
- Mental Health/Police Integration
- Authorize state AGs to investigate and hold departments accountable
- Revise Police Union Contracts
- Training on racial discrimination
- End Qualified Immunity
- Revise Police Union Contracts

Source: Heart+Mind Strategies CV-19 Tracking
Underlying Forces are Shifting

<table>
<thead>
<tr>
<th>Ideology</th>
<th>Universal Basic Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>41% Conservative</td>
<td>56% Support</td>
</tr>
<tr>
<td>37% Liberal</td>
<td>18% Neither</td>
</tr>
<tr>
<td>13% &quot;Hard&quot; Moderate</td>
<td>26% Oppose</td>
</tr>
</tbody>
</table>

Support Universal Basic Income by Ideology

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>46% Conservative</td>
<td>72% Liberal</td>
</tr>
<tr>
<td>53% Moderate</td>
<td></td>
</tr>
</tbody>
</table>
We can last in isolation only 2-4 more weeks.

Most believe they have about 2-4 more weeks of isolation in them before their mental and/or physical health is seriously compromised.
Uptick in Personal Travel

Q: When are you likely to do each of the following?

<table>
<thead>
<tr>
<th></th>
<th>Next Week</th>
<th>Next Month</th>
<th>2-3 Months</th>
<th>4-6 Months</th>
<th>7-12 Months</th>
<th>More than Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Transportation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>30%</td>
</tr>
<tr>
<td>Biz trip by car</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>20%</td>
</tr>
<tr>
<td>Personal trip by car</td>
<td>+6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>23%</td>
</tr>
<tr>
<td>Biz trip by plane/train</td>
<td>+6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>29%</td>
</tr>
<tr>
<td>Personal trip by plane/train</td>
<td>+4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>36%</td>
</tr>
</tbody>
</table>

Source: Heart+Mind Strategies CV-19 Tracking
Expected Biz Travel Reaches Majority in October: Manage Expectations

Q: When are you likely to do each of the following?

- Biz trip by car
- Biz trip by plane/train
- Concert
- Sporting event

Source: Heart+Mind Strategies CV-19 Tracking
Research Methodology

- Online, US national survey of n=1,000
- US adults age 18+
- Weekly field starting in March 2020; field Tuesday-Thursday
- Unless otherwise noted, the most current data in this presentation is from July 7-9, 2020
Contact

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• Other reports from our tracking can be found on our CV-19 website:
  •  http://heartandmindstrategies.com/covid-19/