

COVID-19: The Global Impact Roundtable

United States

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Worldwide
Independent Network
Of Market Research

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Discussion
Points

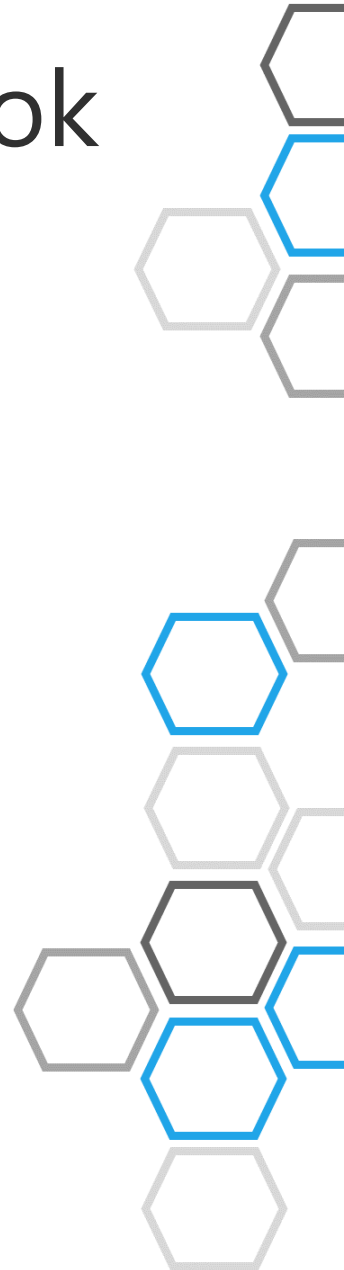
Impact of COVID-19
on US Economy and
Future Outlook

Presidential Election
and Public Opinion
around COVID-19



COVID-19 Impact on U.S. Economy and Outlook

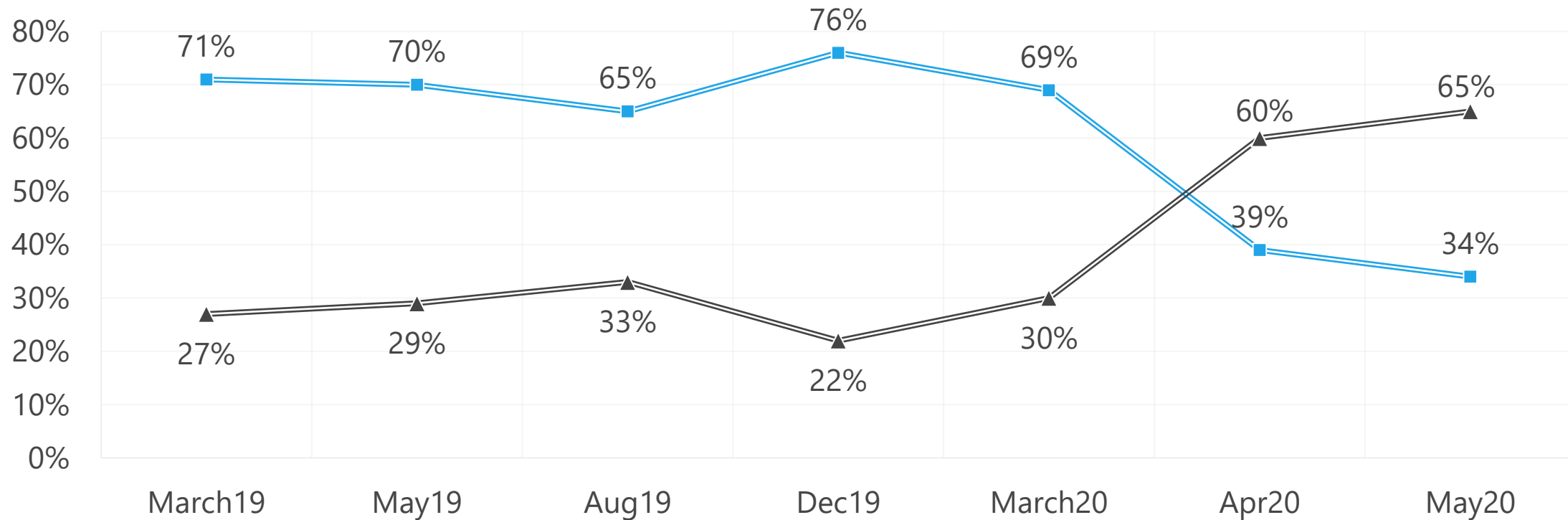
- At the height of restrictions in late March and early April, more than 310 million Americans were under directives ranging from “shelter in place” to “stay at home.” The orders varied by state, county and even city.
- **April 2020 unemployment rate 14.7% (23.1 million unemployed), May 2020 unemployment down to 13.3%;**
 - Lower May 2020 number a function of a combination of Federal stimulus and businesses re-opening.
 - Unemployment needs to go down substantially from this point. Too early to say it will continue to decline in the out months.
- **Small businesses with less than 100 employees are impacted the most;**
 - According to McKinsey & Co study nearly 50% of small business jobs are vulnerable;
 - Accommodations, food services, construction, retailing, and social assistance are most impacted.
- **Threat to recovery:**
 - Recurrence of COVID-19 as we reopen;
 - Potential trade war with China poses another level of uncertainty around economic recovery post COVID-19.
- **Business outlook for the remainder of 2020 and 2021 and beyond remains cautious as businesses set their budgets and expectations in an environment driven by COVID-19 and China trade war.**



U.S. Economic Outlook

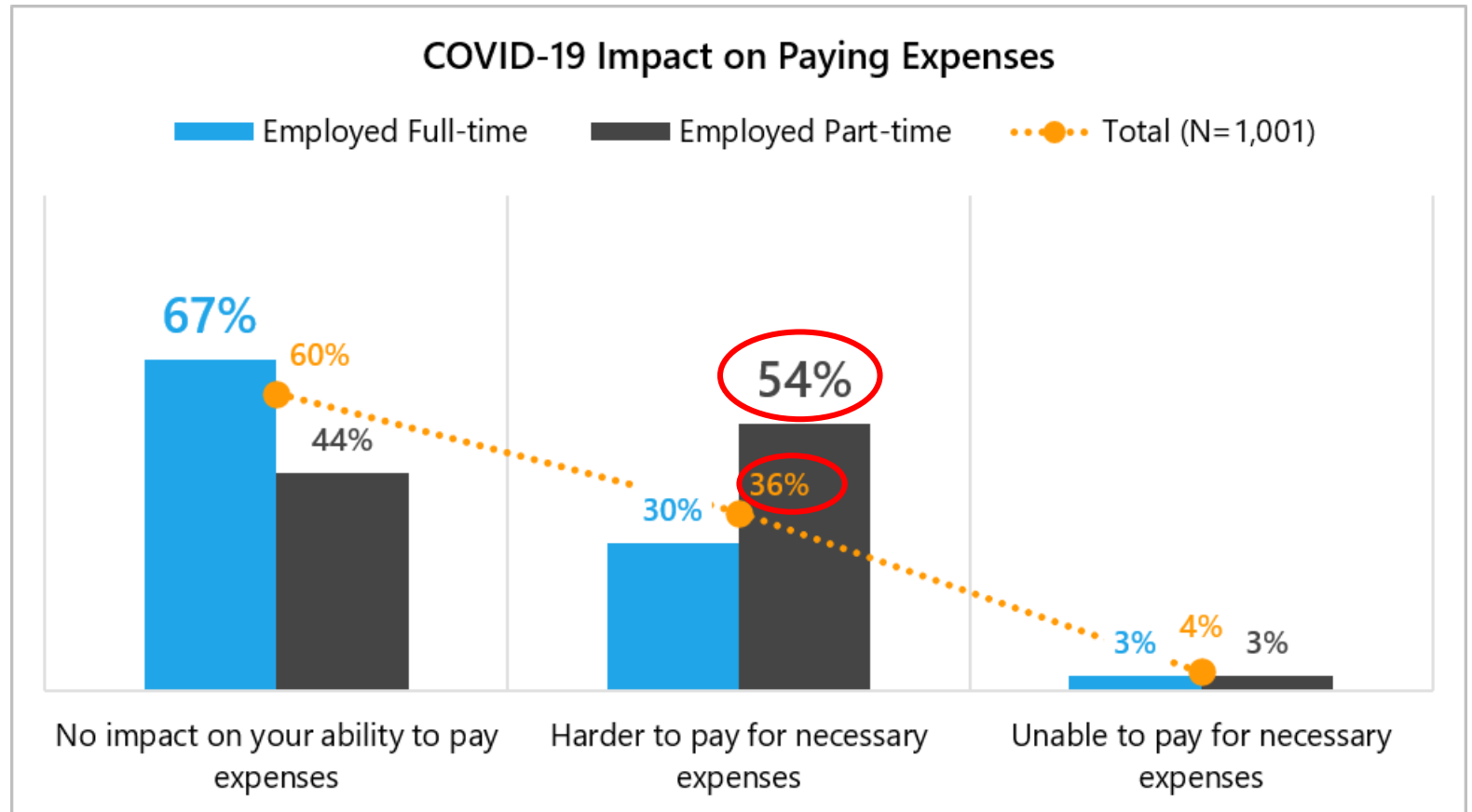
ECONOMIC CONDITIONS: CNN/SSRS POLL

■ Very/Somewhat good ▲ Very/Somewhat Poor




COVID-19 Financial Impact on Workers

- Over a third of workers having difficulty paying expenses.
- Over half of part time workers having difficulty paying expenses.



Survey conducted by SSRS on SSRS Opinion Panel

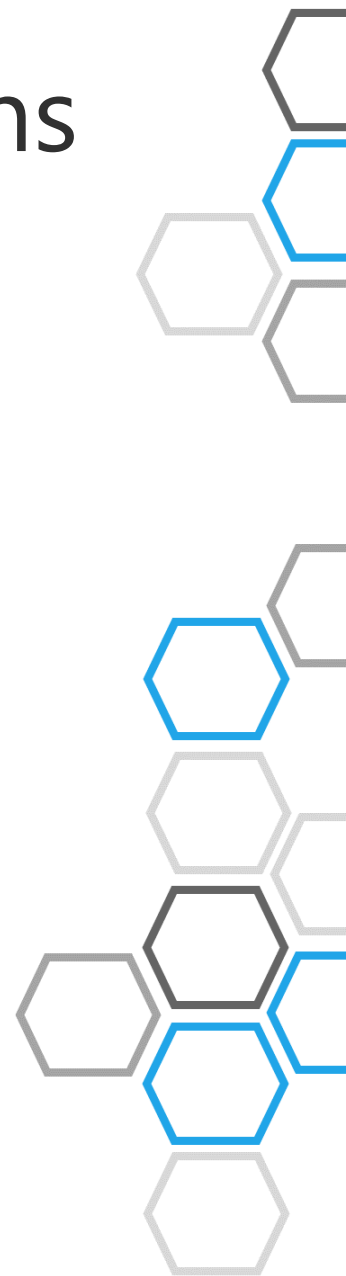
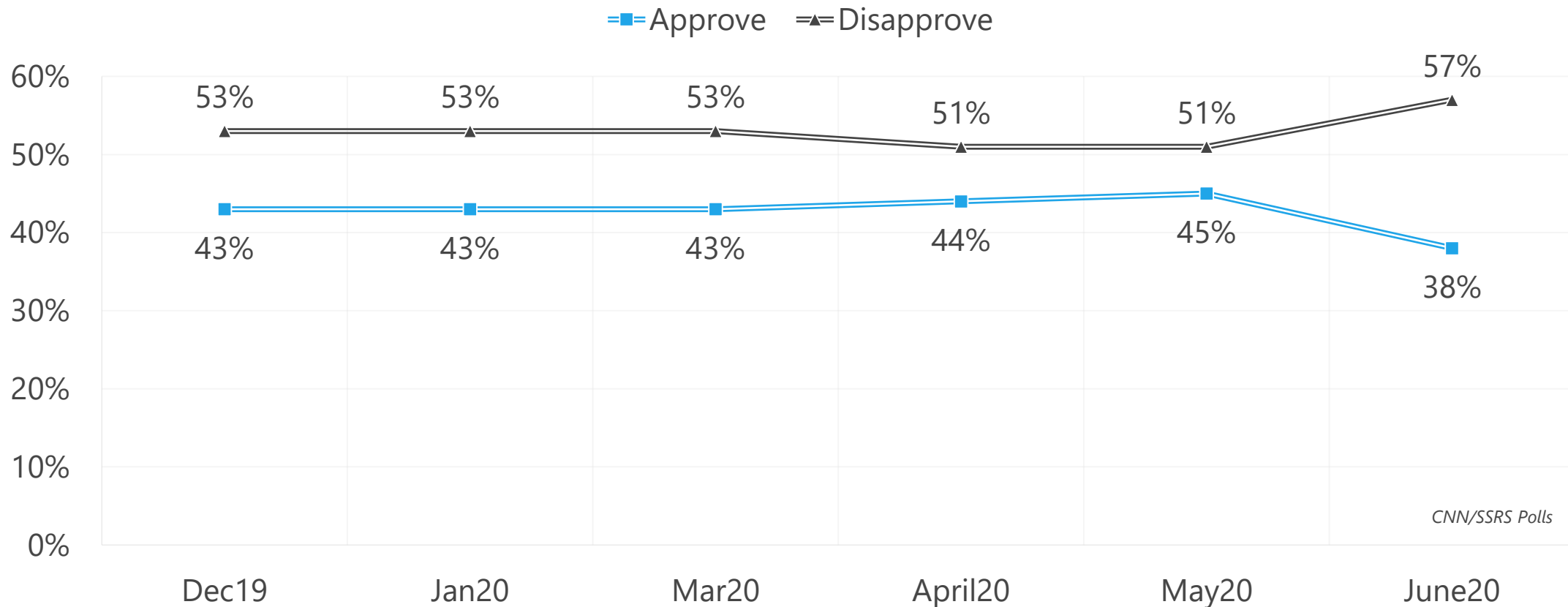


Presidential Election and Public Opinion in the United States Around COVID-19

- **Social distancing will have a profound impact on 2020 presidential election voting.**
 - Traditional in-person voting will play a more limited role in 2020 elections.
 - Mail based balloting will play a significant role.
 - Many states are sending mail ballots to minimize in-person voting.
 - This shift also has an impact on how campaigns communicate with voters.
 - This has significant implications on voter turn-out estimates.
- **Review relevant public opinion polling around COVID-19.**

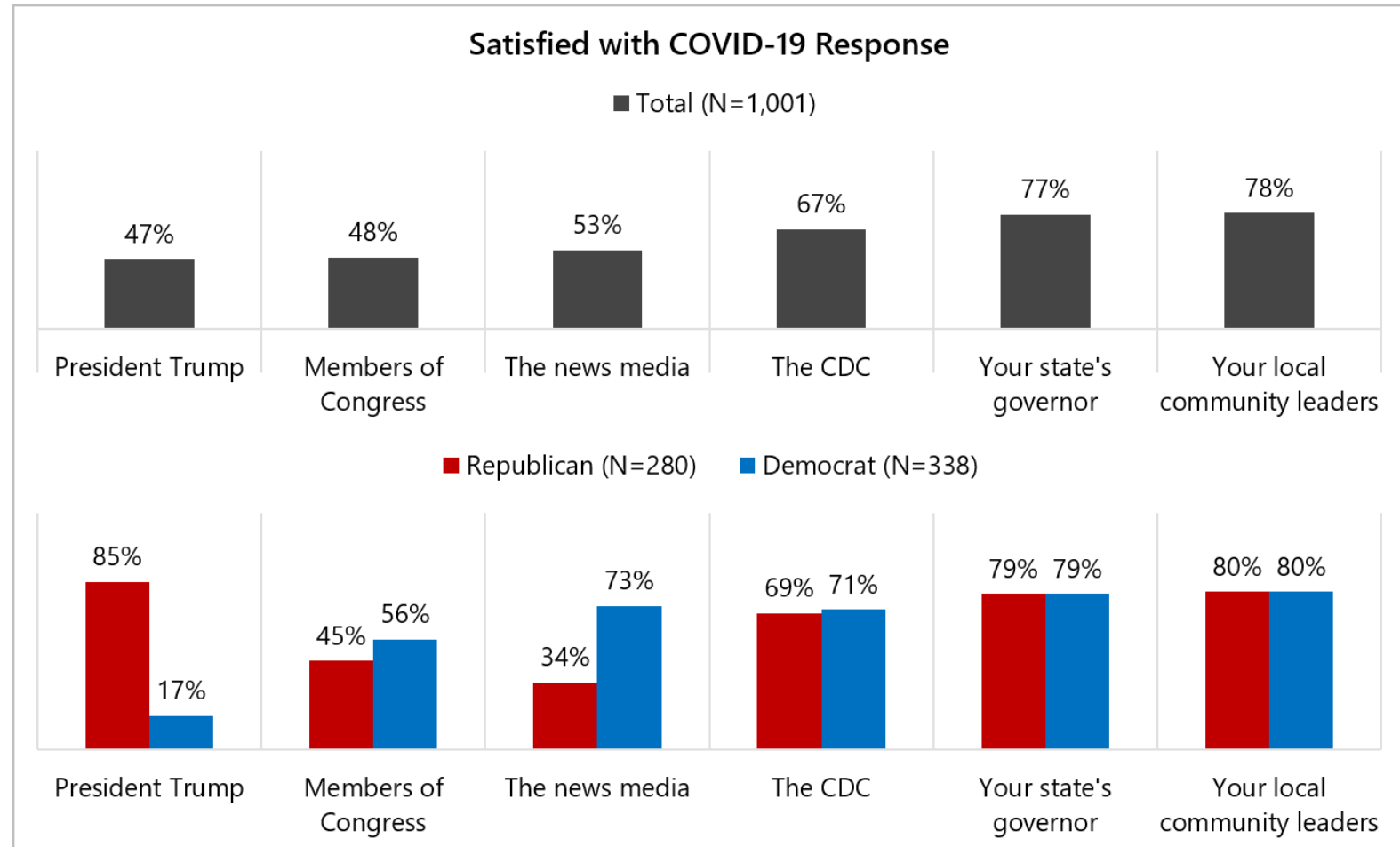
Presidential Approval During COVID-19 Months

DONALD TRUMP APPROVAL: CNN/SSRS POLL



COVID-19 Agency Response Satisfaction

- Lower satisfaction on Federal response. Higher satisfaction with state and community level response.
- Partisan divide on COVID-19 response at the federal level.
- Political parties converge on COVID-19 response satisfaction at state and community level.



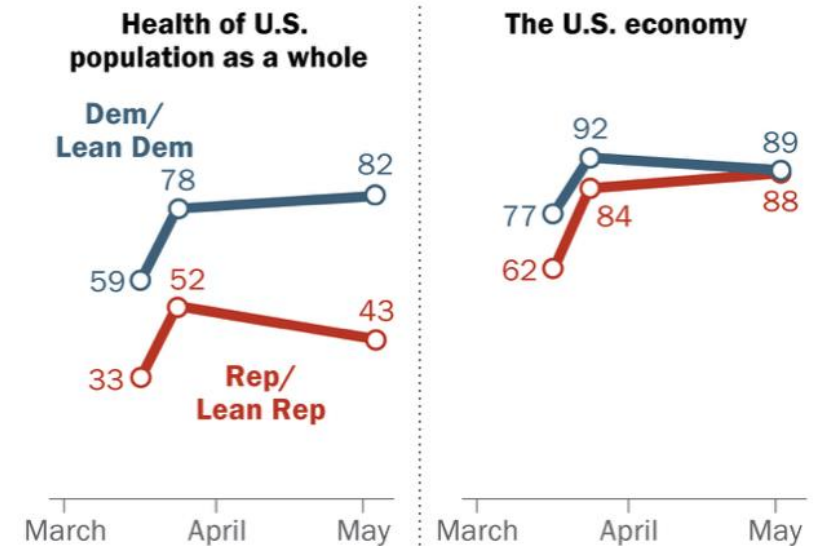
Based on Survey conducted by SSRS on SSRS Opinion Panel (May 2020)

Health and Economy

- Eight out of 10 democrats believe that coronavirus outbreak is a major threat to the U.S. population compared to 4 out of 10 Republicans.
- Both political parties agree on coronavirus being major threat to U.S. economy.

Declining share of Republicans view coronavirus outbreak as a major threat to the health of the U.S. population

% of U.S. adults who say coronavirus outbreak is a major threat to ...



Note: Respondents who gave other responses or who did not give an answer are not shown.

Source: Survey conducted April 29-May 5, 2020.

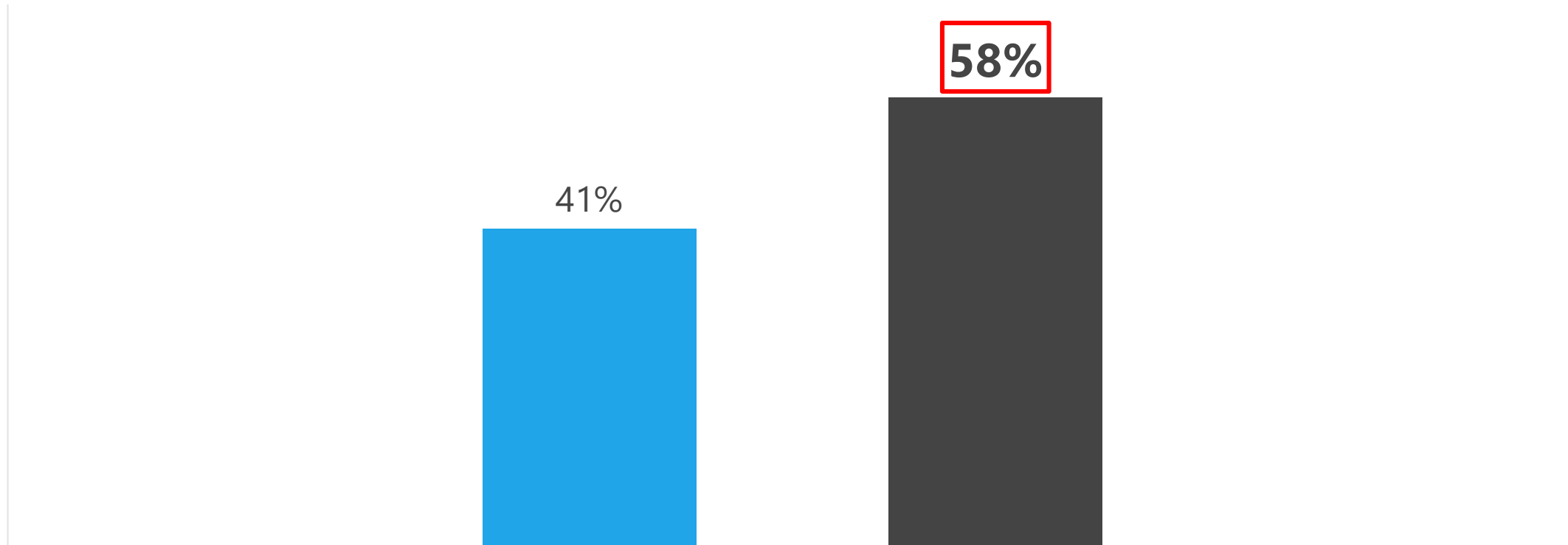
"Most Americans Say Federal Government Has Primary Responsibility for COVID-19 Testing"

PEW RESEARCH CENTER

Comfortable returning to physical workplace?

MAY 2020 CNN/SSRS POLL

■ Comfortable ■ Not comfortable

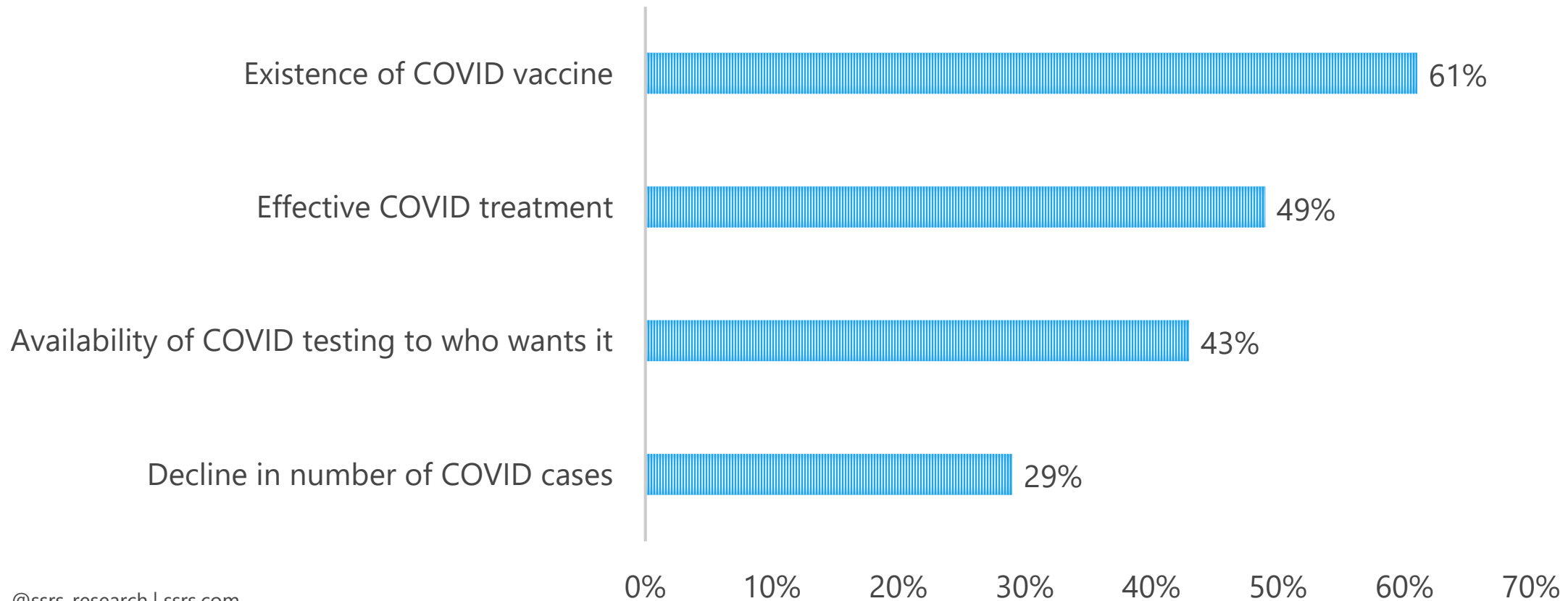


RETURN TO WORK

What would help returning to work?

MAY 2020 CNN/SSRS POLL

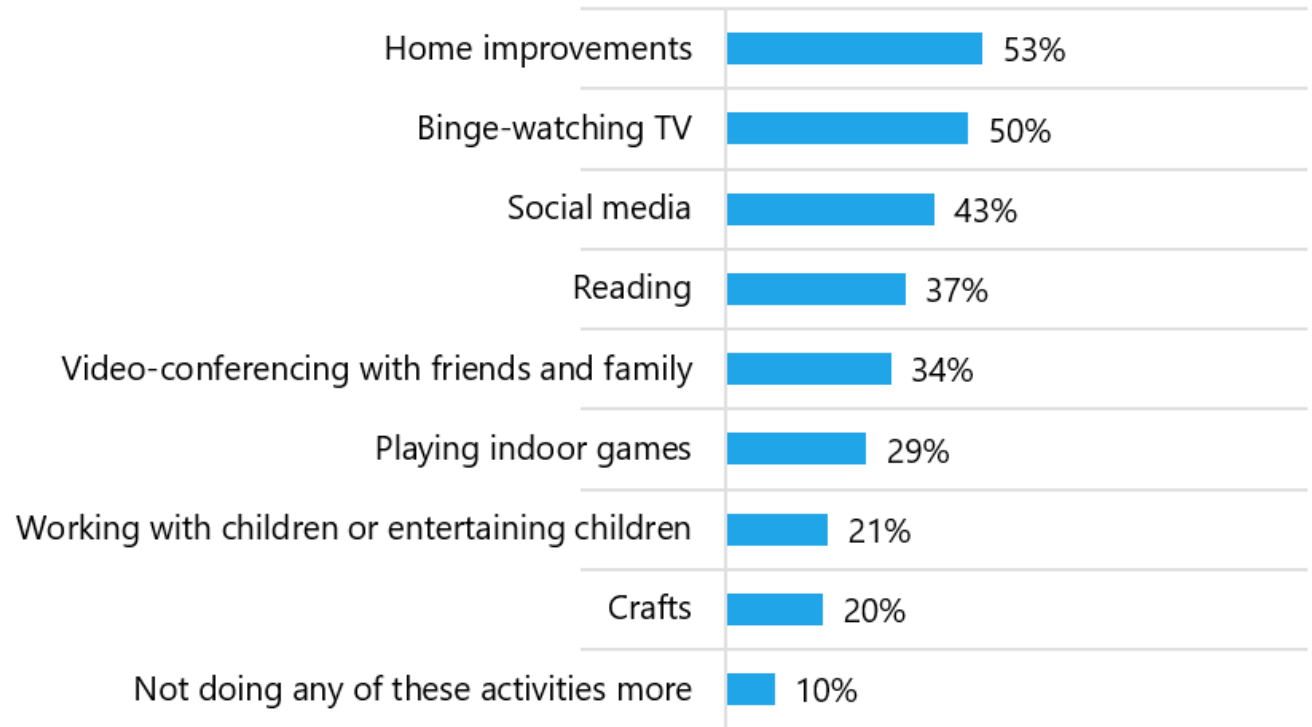
■ Much more comfortable return to work



Activities During COVID-19

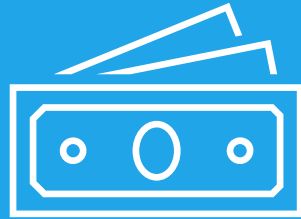
- One half say they are doing more home improvements (53%), or binge-watching TV (50%).
- About four in ten say they are using more social media (43%) or more reading (37%).

Activities Engaging in More (Total N=1,001)



Survey conducted by SSRS on SSRS Opinion Panel May 2020

Overall



Cautious economic outlook for the remainder of 2020 and 2021



Social distancing will have a profound impact on how 2020 presidential elections are conducted



Americans are concerned about the economy and returning to physical workplace post COVID-19



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