



MESSAGE FACTORS, INC.™
Insightful Marketing Research

CONSUMER ATTITUDES REGARDING COVID-19 AND CLEANLINESS

Prepared For:



June 2020

1828-24 TBL/LML

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Background and Methodology

- Message Factors, Inc. (MFI) was commissioned by Finn Partners to conduct quantitative research on behalf of their client, SERVPRO.
- Objectives of this research include:
 - Measure general consumer attitudes and expectations regarding cleanliness in the context of COVID
 - Identify health risks perceived by consumers in retail/commercial environments
 - Determine the impact of commercial cleaning solutions on perceived cleanliness of retail/commercial environments
- MFI designed the survey instrument in collaboration with Finn Partners and SERVPRO. MFI programmed the survey and launched it via Dynata InstantPop to a national audience of consumer opinion panel members.
- This report presents feedback from n=1,000 national consumers that was collected May 29-30, 2020.

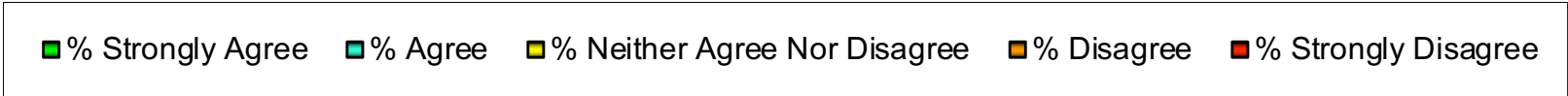
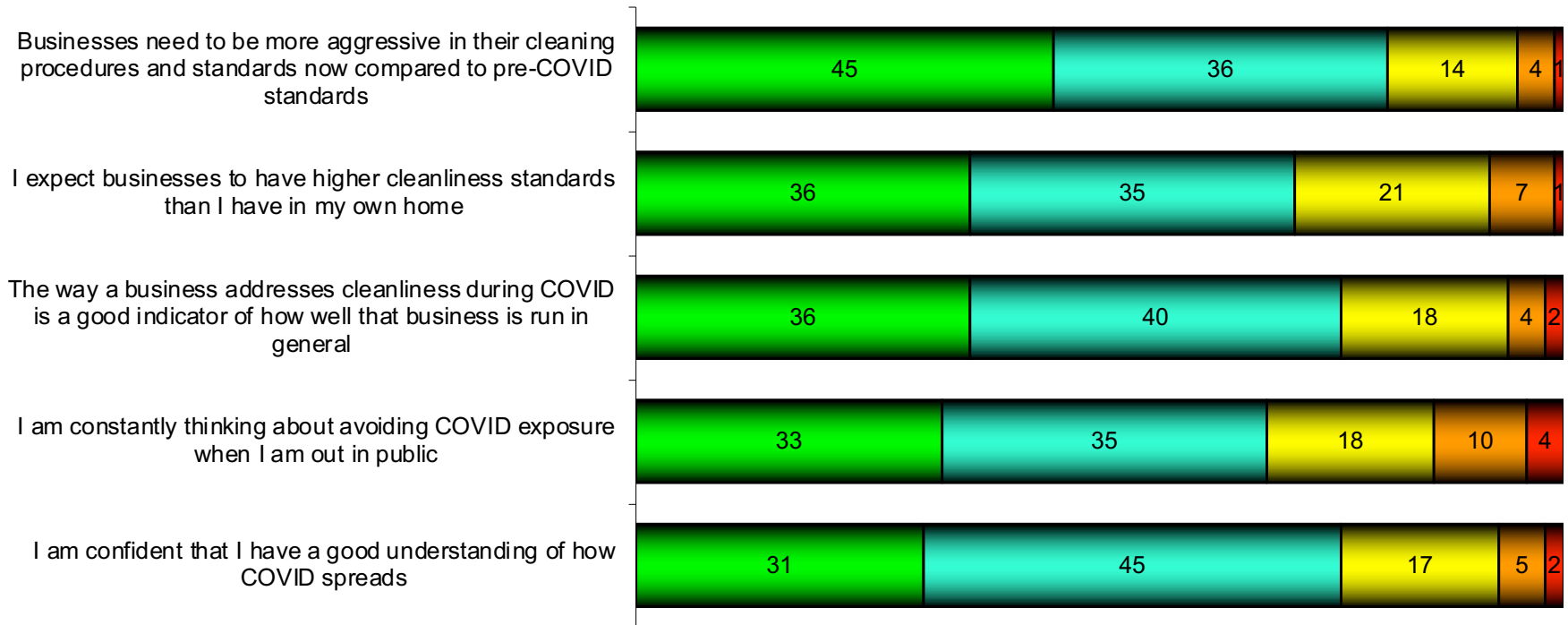
Executive Summary

- Consumers generally feel knowledgeable about COVID.
 - ✓ 76% are confident they have a good idea of how COVID spreads.
 - ✓ 87% feel current guidelines about protecting oneself from COVID are very/somewhat clear.
- Consumers perceive COVID as a significant risk.
 - ✓ 68% are constantly thinking about avoiding COVID exposure when out in public.
 - ✓ 59% are worried about COVID exposure from touching surfaces that have not been sufficiently cleaned.
 - ✓ Respondents are more concerned about their personal COVID exposure and its consequences than they are about spreading COVID to others or being judged as irresponsible for being out in public.
 - ✓ Even with extensive precautions (mask requirements, hand sanitizers, capacity limitations), 22% of respondents would be unwilling to attend a large public event in three months (this increases to 29% among those age 55 or older).
- Consumers have heightened expectations of businesses when it comes to providing a clean and safe environment.
 - ✓ 81% say businesses need to be more aggressive now than before COVID when it comes to cleaning.
 - ✓ 71% have higher cleanliness expectations for businesses than for their own homes.
 - ✓ 73% expect to stay more attuned to cleanliness even after COVID passes.
 - ✓ 67% say feeling comfortable entering a store hinges on employees wearing masks, and 63% want to see employees cleaning high-touch areas.
 - ✓ Some businesses are seen as riskier than others.. 52% of respondents are confident in the cleanliness of high-end grocers, while only 25% are confident in their local neighborhood bar/pub.
- Professional cleaning is a potential differentiator for businesses.
 - ✓ 31% of respondents say a decal indicating that a business has been professionally cleaned is a must-have for them to be comfortable entering.
 - ✓ 58% feel professionally cleaned businesses are likely to be much/somewhat cleaner than other businesses.
 - ✓ All else being equal (product, price, service, convenience), 64% of respondents are more likely to shop at a business with a decal indicating professional cleaning, than at a store without such a decal.

Attitudes Regarding COVID

Attitudes Regarding COVID

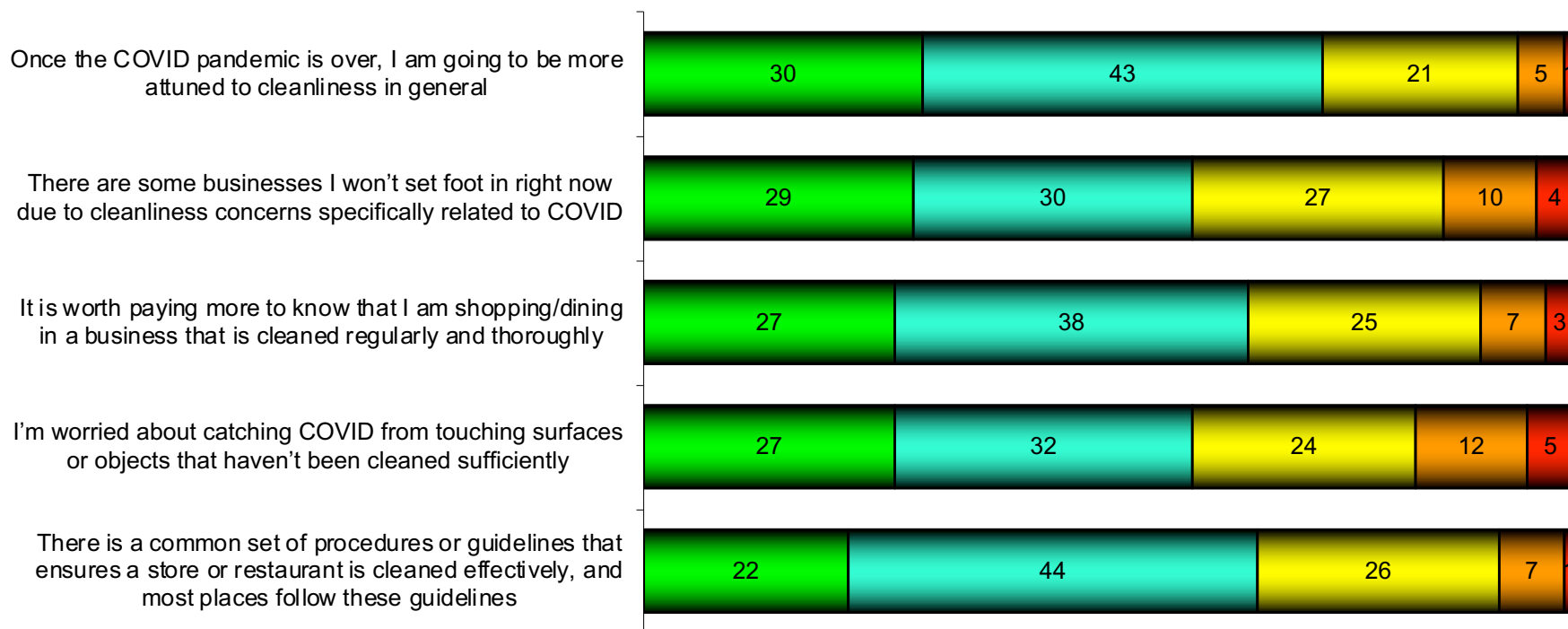
- Four in five (81%) respondents strongly agree or agree that businesses need to be more aggressive in their cleaning procedures and standards now compared to pre-COVID standards.



All respondents were asked, "How much do you agree with each of the following statements?" (n=1000)

Attitudes Regarding COVID (Continued)

- Three-quarters (73%) of respondents strongly agree or agree that they will be more attuned to cleanliness in general once the COVID pandemic is over.



All respondents were asked, "How much do you agree with each of the following statements?" (n=1000)

Attitudes Regarding COVID (Continued)

- Older respondents are less likely than younger respondents to feel that there is a common set of procedures or guidelines that ensures a store is cleaned effectively, and most places follow these guidelines.

		Gender		Age			Annual HHI				Kids <18 in HH	
	Total	Male	Female	Under 35	35-54	55+	<\$40k	\$40k- \$74,999	\$75k- \$124,999	\$125k+	Yes	No
n=	1000	501	499	308	362	330	187	245	294	221	293	613
There is a common set of procedures or guidelines that ensures a store/restaurant is cleaned effectively, and most places follow these guidelines												
Strongly Agree	22%	21%	23%	26%	23%	18%	29%	22%	20%	21%	27%	21%
Agree	44%	46%	41%	44%	42%	45%	40%	47%	46%	41%	46%	43%
Neither Agree/Disagree	26%	24%	27%	21%	27%	29%	27%	23%	24%	30%	20%	28%
Disagree	7%	8%	6%	8%	5%	8%	3%	7%	9%	7%	6%	7%
Strongly Disagree	2%	1%	2%	2%	2%	0%	2%	2%	1%	1%	1%	1%
Businesses need to be more aggressive in their cleaning procedures and standards now compared to pre-COVID standards												
Strongly Agree	45%	40%	51%	40%	48%	47%	50%	47%	42%	45%	45%	48%
Agree	36%	39%	34%	33%	34%	41%	27%	37%	38%	39%	33%	38%
Neither Agree/Disagree	14%	15%	12%	17%	14%	10%	17%	11%	14%	11%	15%	11%
Disagree	4%	6%	3%	8%	3%	1%	5%	3%	5%	4%	5%	3%
Strongly Disagree	1%	1%	1%	2%	1%	0%	2%	1%	1%	1%	1%	1%
There are some businesses I won't set foot in right now due to cleanliness concerns specifically related to COVID												
Strongly Agree	30%	26%	33%	30%	31%	27%	30%	28%	29%	33%	31%	31%
Agree	30%	33%	26%	31%	28%	30%	30%	35%	30%	27%	37%	27%
Neither Agree/Disagree	27%	26%	28%	22%	28%	29%	28%	24%	25%	25%	18%	29%
Disagree	10%	10%	9%	13%	9%	8%	5%	9%	12%	11%	11%	9%
Strongly Disagree	5%	5%	4%	4%	4%	6%	6%	3%	5%	4%	3%	5%

Attitudes Regarding COVID (Continued)

- One-quarter (26%) of respondents who don't have any concerns about going out in public still feel that there are some businesses they won't set foot in right now due to cleanliness concerns specifically related to COVID.

	Total	Constantly thinking about COVID when out	Current Guidelines/Steps for COVID Protection		Primary Concern About Going Out in Public			
			Very/Somewhat Clear	Somewhat/Very Confusing	Getting ill from COVID	Spreading COVID to others	Others will think I am acting careless	No concerns
n=	1000	327	879	121	477	226	124	173
There is a common set of procedures/guidelines that ensures a store/restaurant is cleaned effectively, and most places follow these guidelines								
Strongly Agree	22%	38%	23%	14%	26%	19%	21%	14%
Agree	44%	36%	45%	35%	41%	49%	41%	46%
Neither Agree nor Disagree	26%	16%	25%	33%	25%	23%	23%	34%
Disagree	7%	8%	6%	10%	6%	8%	9%	5%
Strongly Disagree	2%	2%	1%	8%	1%	0%	6%	2%
Businesses need to be more aggressive in their cleaning procedures and standards now compared to pre-COVID standards								
Strongly Agree	45%	79%	47%	34%	60%	41%	28%	20%
Agree	36%	18%	37%	31%	31%	42%	36%	42%
Neither Agree nor Disagree	14%	2%	13%	18%	7%	14%	22%	27%
Disagree	4%	1%	3%	13%	1%	4%	12%	8%
Strongly Disagree	1%	0%	1%	3%	1%	0%	2%	3%
There are some businesses I won't set foot in right now due to cleanliness concerns specifically related to COVID								
Strongly Agree	30%	57%	31%	21%	39%	26%	22%	12%
Agree	30%	27%	31%	19%	32%	36%	31%	14%
Neither Agree nor Disagree	27%	12%	25%	37%	23%	26%	28%	38%
Disagree	10%	4%	9%	14%	5%	11%	13%	19%
Strongly Disagree	5%	2%	4%	8%	1%	1%	6%	17%

Attitudes Regarding COVID (Continued)

- Three-quarters (75%) of higher income respondents with household incomes \$125k+ feel it's worth paying more to know they are shopping/dining in businesses that are cleaned regularly and thoroughly.

	Gender			Age			Annual HHI				Kids <18 in HH	
	Total	Male	Female	Under 35	35-54	55+	<\$40k	\$40k- \$74,999	\$75k- \$124,999	\$125k+	Yes	No
n=	1000	501	499	308	362	330	187	245	294	221	293	613
I expect businesses to have higher cleanliness standards than I have in my own home												
Strongly Agree	36%	33%	39%	35%	41%	32%	40%	35%	37%	38%	39%	37%
Agree	35%	36%	34%	33%	33%	37%	33%	40%	37%	29%	35%	35%
Neither Agree/Disagree	21%	23%	18%	22%	20%	20%	19%	19%	17%	24%	19%	20%
Disagree	7%	7%	6%	7%	5%	9%	5%	4%	9%	7%	7%	7%
Strongly Disagree	2%	1%	2%	2%	1%	2%	3%	2%	0%	2%	1%	2%
I am confident that I have a good understanding of how COVID spreads												
Strongly Agree	31%	28%	34%	35%	30%	29%	37%	31%	30%	30%	39%	30%
Agree	45%	48%	43%	37%	47%	51%	40%	46%	46%	48%	39%	49%
Neither Agree/Disagree	17%	16%	18%	19%	19%	13%	18%	14%	17%	16%	17%	15%
Disagree	5%	7%	4%	7%	3%	5%	5%	7%	5%	5%	3%	5%
Strongly Disagree	2%	2%	1%	3%	1%	1%	1%	2%	2%	1%	1%	1%
It is worth paying more to know that I am shopping/dining in a business that is cleaned regularly and thoroughly												
Strongly Agree	27%	24%	30%	29%	27%	26%	29%	25%	25%	33%	30%	27%
Agree	38%	42%	35%	33%	41%	40%	29%	42%	38%	42%	38%	39%
Neither Agree/Disagree	25%	25%	25%	25%	24%	26%	27%	24%	27%	20%	24%	24%
Disagree	7%	7%	6%	8%	6%	5%	9%	6%	8%	2%	6%	7%
Strongly Disagree	3%	3%	3%	4%	2%	3%	6%	2%	2%	2%	2%	3%

All respondents were asked, "How much do you agree with each of the following statements?"

Attitudes Regarding COVID (Continued)

- For respondents who are constantly thinking about COVID when they're out in public, one-half (51%) strongly agree that it's worth paying more to know they are shopping/dining in a business that is cleaned regularly and thoroughly.

	Total	Constantly thinking about COVID when out	Current Guidelines/Steps for COVID Protection		Primary Concern About Going Out in Public			
			Very/Somewhat Clear	Somewhat/Very Confusing	Getting ill from COVID	Spreading COVID to others	Others will think I am acting careless	No concerns
n=	1000	327	879	121	477	226	124	173
I expect businesses to have higher cleanliness standards than I have in my own home								
Strongly Agree	36%	65%	37%	27%	46%	36%	27%	16%
Agree	35%	23%	36%	28%	34%	33%	40%	36%
Neither Agree nor Disagree	21%	9%	20%	26%	14%	26%	22%	30%
Disagree	7%	2%	6%	14%	4%	4%	9%	15%
Strongly Disagree	2%	2%	1%	4%	1%	0%	2%	3%
I am confident that I have a good understanding of how COVID spreads								
Strongly Agree	31%	52%	34%	13%	39%	27%	18%	24%
Agree	45%	35%	47%	35%	43%	48%	45%	48%
Neither Agree nor Disagree	17%	8%	15%	29%	13%	16%	26%	21%
Disagree	5%	3%	4%	16%	4%	6%	10%	4%
Strongly Disagree	2%	2%	1%	7%	0%	3%	2%	3%
It is worth paying more to know that I am shopping/dining in a business that is cleaned regularly and thoroughly								
Strongly Agree	27%	51%	28%	18%	35%	25%	21%	12%
Agree	38%	28%	38%	40%	38%	41%	42%	31%
Neither Agree nor Disagree	25%	15%	25%	27%	19%	29%	24%	38%
Disagree	7%	3%	6%	10%	5%	5%	10%	10%
Strongly Disagree	3%	2%	3%	4%	2%	0%	3%	10%

Attitudes Regarding COVID (Continued)

- Respondents under 35 are most likely to be concerned about catching COVID from touching surfaces or objects that haven't been cleaned sufficiently.

	Gender			Age			Annual HHI				Kids <18 in HH	
	Total	Male	Female	Under 35	35-54	55+	<\$40k	\$40k- \$74,999	\$75k- \$124,999	\$125k+	Yes	No
n=	1000	501	499	308	362	330	187	245	294	221	293	613
I am constantly thinking about avoiding COVID exposure when I am out in public												
Strongly Agree	33%	29%	36%	32%	33%	33%	37%	36%	30%	31%	32%	34%
Agree	35%	35%	35%	33%	34%	37%	29%	36%	35%	36%	35%	35%
Neither Agree/Disagree	18%	19%	17%	21%	18%	16%	20%	16%	20%	16%	17%	17%
Disagree	10%	12%	8%	11%	10%	9%	9%	9%	10%	12%	12%	9%
Strongly Disagree	5%	5%	4%	4%	5%	5%	5%	2%	6%	4%	3%	5%
I'm worried about catching COVID from touching surfaces or objects that haven't been cleaned sufficiently												
Strongly Agree	27%	27%	27%	34%	28%	20%	33%	30%	28%	23%	35%	25%
Agree	32%	30%	35%	27%	31%	39%	27%	33%	33%	33%	26%	35%
Neither Agree/Disagree	24%	24%	23%	24%	23%	23%	26%	25%	20%	24%	21%	23%
Disagree	12%	14%	10%	10%	12%	14%	8%	10%	13%	16%	14%	12%
Strongly Disagree	5%	5%	4%	4%	6%	4%	6%	3%	6%	5%	4%	5%
The way a business addresses cleanliness during COVID is a good indicator of how well that business is run in general												
Strongly Agree	36%	34%	38%	35%	37%	37%	43%	40%	33%	36%	36%	39%
Agree	40%	39%	41%	35%	38%	47%	32%	40%	45%	40%	42%	40%
Neither Agree/Disagree	18%	20%	16%	22%	19%	14%	20%	18%	17%	17%	16%	17%
Disagree	4%	4%	3%	6%	4%	2%	5%	2%	4%	5%	3%	3%
Strongly Disagree	2%	2%	1%	2%	2%	1%	1%	1%	2%	2%	2%	1%

All respondents were asked, "How much do you agree with each of the following statements?"

Attitudes Regarding COVID (Continued)

- Three in five (63%) respondents who constantly think about COVID when out in public strongly agree that the way a business addresses cleanliness during COVID is a good indicator of how well the business is run in general.

	Total	Constantly thinking about COVID when out	Current Guidelines/Steps for COVID Protection		Primary Concern About Going Out in Public			
			Very/Somewhat Clear	Somewhat/Very Confusing	Getting ill from COVID	Spreading COVID to others	Others will think I am acting careless	No concerns
n=	1000	327	879	121	477	226	124	173
I am constantly thinking about avoiding COVID exposure when I am out in public								
Strongly Agree	33%	100%	34%	20%	49%	27%	17%	6%
Agree	35%	0%	36%	28%	37%	43%	33%	18%
Neither Agree nor Disagree	18%	0%	17%	29%	10%	19%	31%	29%
Disagree	10%	0%	10%	12%	3%	9%	14%	27%
Strongly Disagree	5%	0%	4%	11%	0%	1%	5%	20%
I'm worried about catching COVID from touching surfaces or objects that haven't been cleaned sufficiently								
Strongly Agree	27%	58%	29%	17%	43%	18%	15%	6%
Agree	32%	27%	32%	32%	37%	38%	32%	10%
Neither Agree nor Disagree	24%	10%	23%	26%	15%	30%	35%	32%
Disagree	12%	3%	12%	15%	4%	13%	15%	31%
Strongly Disagree	5%	2%	4%	9%	1%	1%	4%	21%
The way a business addresses cleanliness during COVID is a good indicator of how well that business is run in general								
Strongly Agree	36%	63%	38%	23%	46%	34%	26%	20%
Agree	40%	28%	41%	36%	39%	43%	35%	44%
Neither Agree nor Disagree	18%	7%	17%	31%	13%	19%	30%	24%
Disagree	4%	1%	3%	7%	2%	4%	6%	9%
Strongly Disagree	2%	2%	1%	2%	1%	1%	3%	3%

Attitudes Regarding COVID (Continued)

- Three in five (59%) respondents who constantly worry about COVID when out in public strongly agree they'll be more attuned to cleanliness in general once the COVID pandemic is over.

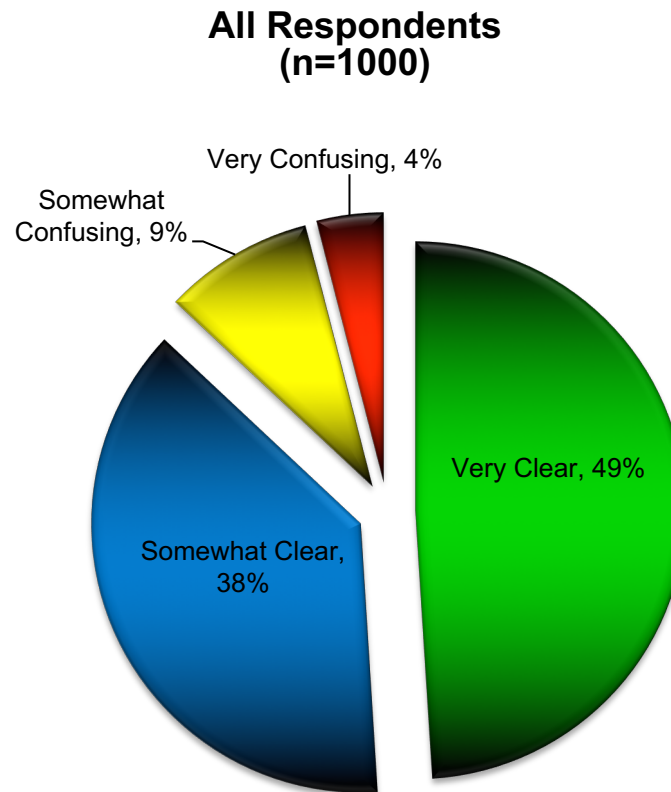
	Total	Gender		Age			Annual HHI				Kids <18 in HH	
		Male	Female	Under 35	35-54	55+	<\$40k	\$40k- \$74,999	\$75k- \$124,999	\$125k+	Yes	No
n=	1000	501	499	308	362	330	187	245	294	221	293	613
Once the COVID pandemic is over, I am going to be more attuned to cleanliness in general												
Strongly Agree	30%	27%	32%	35%	31%	23%	32%	33%	30%	28%	37%	28%
Agree	43%	44%	41%	33%	42%	52%	37%	45%	41%	46%	38%	45%
Neither Agree/Disagree	22%	23%	20%	20%	22%	22%	25%	17%	22%	19%	19%	21%
Disagree	5%	5%	5%	8%	4%	2%	4%	4%	5%	6%	4%	4%
Strongly Disagree	2%	2%	1%	4%	1%	0%	2%	2%	1%	1%	1%	1%

	Total	Constantly thinking about COVID when out	Current Guidelines/Steps for COVID Protection		Primary Concern About Going Out in Public			
			Very/Somewhat Clear	Somewhat/Very Confusing	Getting ill from COVID	Spreading COVID to others	Others will think I am acting careless	No concerns
n=	1000	327	879	121	477	226	124	173
Once the COVID pandemic is over, I am going to be more attuned to cleanliness in general								
Strongly Agree	30%	59%	30%	25%	40%	29%	18%	10%
Agree	43%	29%	44%	35%	43%	46%	42%	39%
Neither Agree nor Disagree	22%	8%	20%	30%	14%	19%	27%	42%
Disagree	5%	3%	4%	7%	3%	5%	10%	7%
Strongly Disagree	2%	0%	1%	3%	1%	1%	4%	3%

Clarity of COVID Guidelines

Clarity of Current Guidelines and Steps

- One-half (49%) of all respondents feel like the current guidelines and steps to protect themselves from COVID in public are very clear.



All respondents were asked, "How clear or confusing are the current guidelines and steps you should take to protect yourself from COVID when you leave your home?" (n=1000)

Clarity of Current Guidelines and Steps (Continued)

- Women are slightly more likely than men to feel that the guidelines and steps you should take to protect yourself from COVID outside the home are very clear (54% vs. 46% for males).

	Total	Gender		Age			Annual HHI				Kids <18 in HH	
		Male	Female	Under 35	35-54	55+	<\$40k	\$40k-\$74,999	\$75k-\$124,999	\$125k+	Yes	No
n=	1000	501	499	308	362	330	187	245	294	221	293	613
Very Clear	50%	46%	54%	52%	48%	48%	55%	52%	46%	46%	49%	52%
Somewhat Clear	38%	42%	35%	39%	39%	38%	36%	35%	42%	40%	43%	36%
Somewhat Confusing	9%	10%	8%	6%	8%	12%	6%	9%	10%	9%	6%	9%
Very Confusing	4%	3%	4%	3%	5%	2%	3%	4%	2%	5%	2%	3%

All respondents were asked, "How clear or confusing are the current guidelines and steps you should take to protect yourself from COVID when you leave your home?"

Clarity of Current Guidelines and Steps (Continued)

- Among those whose primary concern about going out in public is that others will think they are acting careless, only 31% feel current guidelines and steps are very clear.

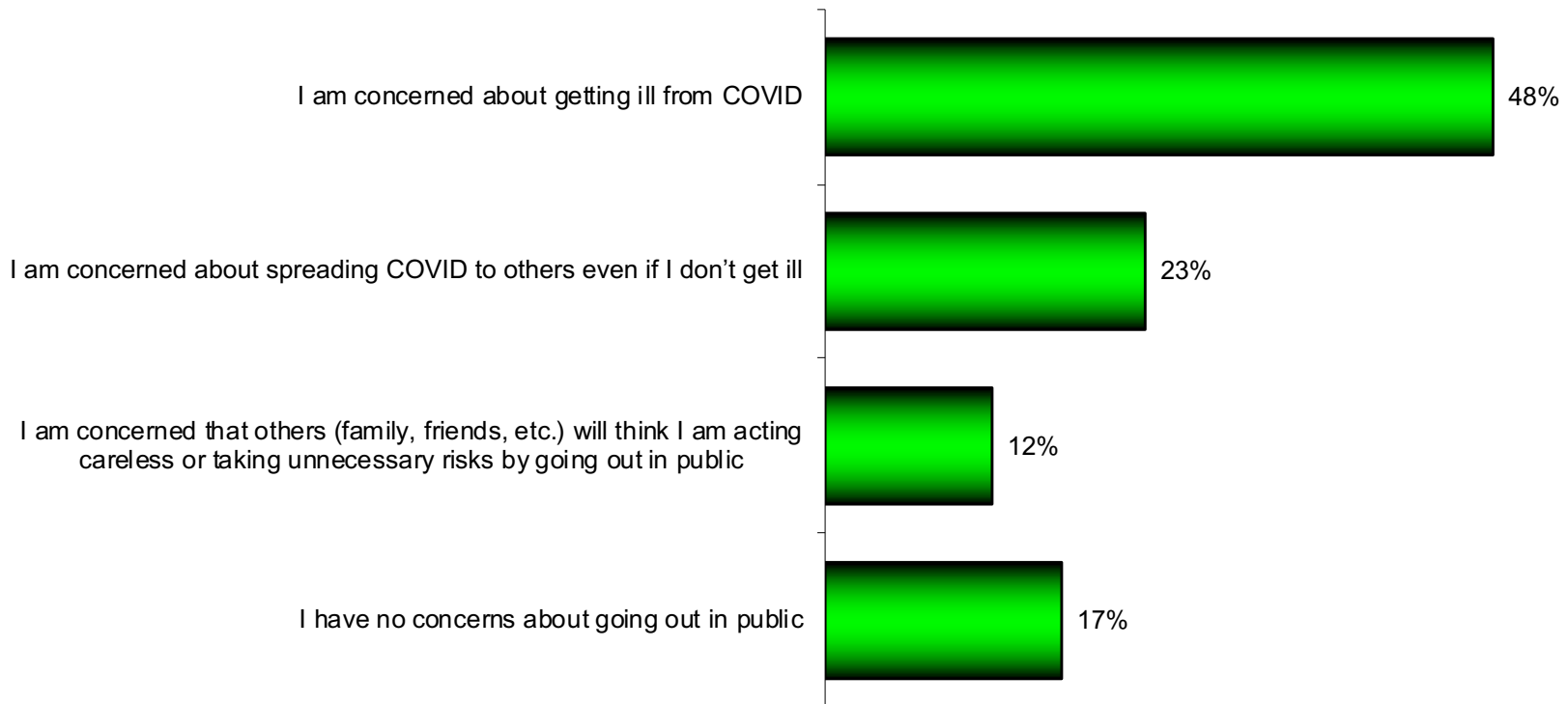
	Total	Constantly thinking about COVID when out	Current Guidelines/Steps for COVID Protection		Primary Concern About Going Out in Public			
			Very/Somewhat Clear	Somewhat/Very Confusing	Getting ill from COVID	Spreading COVID to others	Others will think I am acting careless	No concerns
n=	1000	327	879	121	477	226	124	173
Very Clear	50%	65%	56%	0%	57%	48%	31%	43%
Somewhat Clear	38%	28%	44%	0%	33%	45%	49%	37%
Somewhat Confusing	9%	5%	0%	71%	7%	6%	15%	12%
Very Confusing	4%	2%	0%	29%	2%	1%	5%	9%

All respondents were asked, "How clear or confusing are the current guidelines and steps you should take to protect yourself from COVID when you leave your home?"

Concerns About Being in Public

Primary Concern About Going Out in Public Right Now

- The biggest concern among respondents about going out in public is getting ill from COVID (48%), while one-fifth (17%) don't have any concerns about going out in public.



All respondents were asked, "What is your primary concern about going out in public right now?" Only one response allowed. (n=1000)

Primary Concern About Going Out in Public Right Now (Continued)

- There are few differences in gender when it comes to primary concerns about going out in public right now, while older respondents (61%) are more concerned about getting ill from COVID than younger respondents (40%).

	Total	Gender		Age			Annual HHI				Kids <18 in HH	
		Male	Female	Under 35	35-54	55+	<\$40k	\$40k-\$74,999	\$75k-\$124,999	\$125k+	Yes	No
n=	1000	501	499	308	362	330	187	245	294	221	293	613
I am concerned about getting ill from COVID	48%	48%	48%	40%	42%	61%	47%	52%	45%	48%	40%	53%
I am concerned about spreading COVID to others even if I don't get ill	23%	23%	22%	31%	25%	12%	18%	22%	26%	24%	29%	20%
I am concerned that others will think I am acting careless or taking unnecessary risks by going out in public	12%	12%	13%	16%	15%	6%	12%	13%	12%	13%	16%	10%
I have no concerns about going out in public	17%	18%	16%	13%	18%	21%	22%	13%	17%	15%	15%	17%

All respondents were asked, "What is your primary concern about going out in public right now?" Only one response allowed.

Primary Concern About Going Out in Public Right Now (Continued)

- One-third (29%) of respondents who find current guidelines and steps for COVID protection somewhat or very confusing don't have any concerns about going out in public.

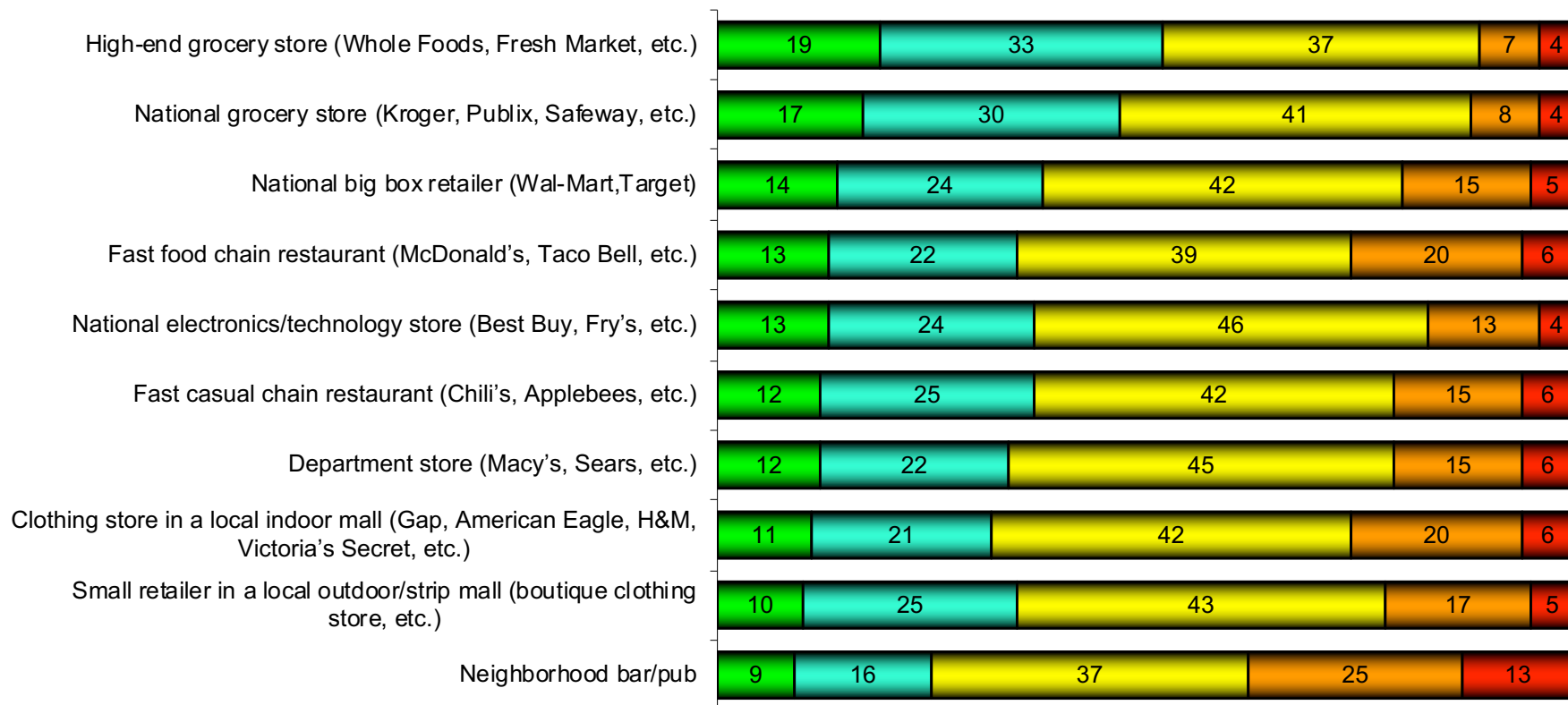
			Current Guidelines/Steps for COVID Protection		Primary Concern About Going Out in Public			
			Very/ Somewhat Clear	Somewhat/ Very Confusing	Getting ill from COVID	Spreading COVID to others	Others will think I am acting careless	No concerns
n=	1000	327	879	121	477	226	124	173
I am concerned about getting ill from COVID	48%	72%	49%	37%	100%	0%	0%	0%
I am concerned about spreading COVID to others even if I don't get ill	23%	19%	24%	13%	0%	100%	0%	0%
I am concerned that others will think I am acting careless or taking unnecessary risks by going out in public	12%	6%	11%	21%	0%	0%	100%	0%
I have no concerns about going out in public	17%	3%	16%	29%	0%	0%	0%	100%

All respondents were asked, "What is your primary concern about going out in public right now?" Only one response allowed.

Confidence in Cleaning Procedures

Confidence About Appropriate Cleaning Procedures Being Followed in Each of the Following Type of Businesses

- Respondents are most confident in the cleaning procedures of high-end grocery stores (52% extremely or very confident) and least confident in neighborhood bars/pubs (25% extremely or very confident).



■ % Extremely Confident ■ % Very Confident ■ % Somewhat Confident ■ % Not Very Confident ■ % Not At All Confident

All respondents were asked, "How confident are you that each of the following types of businesses will follow appropriate cleaning procedures to keep customers and employees safe?" (n=1000)

Confidence About Appropriate Cleaning Procedures Being Followed (Continued)

- Almost one-half (45%) of respondents with kids under 18 living in their households are extremely or very confident that fast food chain restaurants are following appropriate cleaning procedures.

	Total	Gender		Age			Annual HHI				Kids <18 in HH	
		Male	Female	Under 35	35-54	55+	<\$40k	\$40k- \$74,999	\$75k- \$124,999	\$125k+	Yes	No
n=	1000	501	499	308	362	330	187	245	294	221	293	613
Fast food chain restaurant (McDonald's, Taco Bell, etc.)												
Extremely Confident	13%	14%	12%	19%	12%	8%	16%	12%	14%	10%	18%	12%
Very Confident	22%	25%	19%	22%	24%	19%	24%	18%	20%	28%	27%	20%
Somewhat Confident	39%	36%	41%	33%	37%	47%	40%	40%	37%	39%	34%	39%
Not Very Confident	20%	21%	19%	20%	18%	22%	12%	23%	22%	18%	16%	22%
Not At All Confident	7%	5%	8%	6%	9%	5%	9%	6%	6%	6%	5%	7%
Fast casual chain restaurant (Chili's, Applebees, etc.)												
Extremely Confident	12%	12%	12%	17%	12%	7%	17%	10%	12%	11%	17%	10%
Very Confident	25%	27%	22%	26%	26%	22%	24%	22%	25%	29%	30%	23%
Somewhat Confident	42%	42%	43%	34%	38%	54%	39%	47%	43%	38%	34%	45%
Not Very Confident	16%	16%	15%	18%	16%	12%	13%	16%	15%	17%	14%	15%
Not At All Confident	6%	3%	8%	5%	8%	4%	7%	5%	5%	5%	5%	6%
Neighborhood bar/pub												
Extremely Confident	8%	9%	8%	14%	8%	4%	10%	6%	9%	9%	13%	7%
Very Confident	16%	18%	15%	18%	19%	11%	16%	17%	16%	17%	22%	13%
Somewhat Confident	37%	36%	39%	36%	37%	38%	36%	36%	36%	39%	32%	39%
Not Very Confident	25%	26%	24%	21%	21%	32%	20%	28%	28%	23%	23%	27%
Not At All Confident	13%	12%	14%	10%	14%	14%	18%	13%	11%	13%	10%	14%

Confidence About Appropriate Cleaning Procedures Being Followed (Continued)

- Two in five (42%) respondents who find current guidelines and steps somewhat or very confusing are not very or not at all confident that fast food chain restaurants are following appropriate cleaning procedures.

	Total	Constantly thinking about COVID when out	Current Guidelines/Steps for COVID Protection		Primary Concern About Going Out in Public			
			Very/Somewhat Clear	Somewhat/Very Confusing	Getting ill from COVID	Spreading COVID to others	Others will think I'm acting careless	No concerns
n=	1000	327	879	121	477	226	124	173
Fast food chain restaurant (McDonald's, Taco Bell, etc.)								
Extremely Confident	13%	19%	14%	7%	13%	12%	8%	16%
Very Confident	22%	19%	23%	12%	20%	25%	22%	25%
Somewhat Confident	39%	35%	39%	38%	39%	38%	40%	39%
Not Very Confident	20%	18%	18%	30%	21%	20%	22%	13%
Not At All Confident	7%	9%	6%	12%	7%	5%	8%	7%
Fast casual chain restaurant (Chili's, Applebees, etc.)								
Extremely Confident	12%	16%	12%	7%	12%	10%	8%	17%
Very Confident	25%	24%	26%	18%	24%	25%	25%	28%
Somewhat Confident	42%	36%	43%	39%	41%	47%	39%	42%
Not Very Confident	16%	14%	15%	22%	17%	13%	23%	9%
Not At All Confident	6%	9%	5%	13%	6%	5%	6%	5%
Neighborhood bar/pub								
Extremely Confident	8%	13%	9%	4%	9%	7%	7%	11%
Very Confident	16%	13%	16%	16%	14%	17%	19%	20%
Somewhat Confident	37%	30%	38%	36%	33%	39%	40%	45%
Not Very Confident	25%	26%	25%	27%	28%	26%	23%	17%
Not At All Confident	13%	19%	13%	17%	17%	11%	10%	7%

Confidence About Appropriate Cleaning Procedures Being Followed (Continued)

- Almost one-half (47%) of all respondents are extremely or very confident about national grocery stores following appropriate cleaning procedures.

	Total	Gender		Age			Annual HHI				Kids <18 in HH	
		Male	Female	Under 35	35-54	55+	<\$40k	\$40k- \$74,999	\$75k- \$124,999	\$125k+	Yes	No
n=	1000	501	499	308	362	330	187	245	294	221	293	613
National grocery store (Kroger, Publix, Safeway, etc.)												
Extremely Confident	17%	17%	16%	20%	17%	13%	21%	14%	16%	18%	19%	16%
Very Confident	30%	31%	29%	29%	28%	33%	33%	28%	29%	31%	31%	30%
Somewhat Confident	41%	40%	42%	35%	40%	46%	30%	45%	44%	42%	40%	41%
Not Very Confident	9%	9%	8%	12%	9%	5%	8%	9%	9%	7%	8%	8%
Not At All Confident	4%	3%	5%	4%	6%	2%	7%	3%	3%	3%	2%	5%
High-end grocery store (Whole Foods, Fresh Market, etc.)												
Extremely Confident	19%	20%	18%	25%	20%	13%	22%	16%	19%	19%	25%	17%
Very Confident	33%	33%	34%	34%	30%	36%	34%	31%	33%	38%	33%	34%
Somewhat Confident	37%	37%	37%	30%	37%	44%	32%	45%	36%	34%	33%	39%
Not Very Confident	7%	8%	6%	10%	7%	4%	6%	7%	8%	7%	8%	6%
Not At All Confident	3%	2%	5%	1%	6%	3%	6%	2%	4%	3%	1%	4%
National big box retailer (Wal-Mart, Target)												
Extremely Confident	14%	16%	13%	21%	15%	8%	18%	12%	14%	14%	19%	14%
Very Confident	24%	25%	23%	24%	24%	23%	25%	21%	24%	27%	30%	22%
Somewhat Confident	42%	41%	43%	38%	40%	49%	37%	44%	41%	43%	37%	42%
Not Very Confident	15%	15%	14%	13%	14%	17%	12%	18%	16%	12%	13%	16%
Not At All Confident	5%	3%	6%	4%	7%	4%	7%	4%	5%	4%	2%	6%

Confidence About Appropriate Cleaning Procedures Being Followed (Continued)

- One-half (50%) of respondents whose primary concern about going out in public is getting ill from COVID are extremely or very confident that high-end grocery stores are following appropriate cleaning procedures.

	Total	Constantly thinking about COVID when out	Current Guidelines/Steps for COVID Protection		Primary Concern About Going Out in Public			
			Very/Somewhat Clear	Somewhat/Very Confusing	Getting ill from COVID	Spreading COVID to others	Others will think I'm acting careless	No concerns
n=	1000	327	879	121	477	226	124	173
National grocery store (Kroger, Publix, Safeway, etc.)								
Extremely Confident	17%	22%	18%	11%	17%	15%	11%	23%
Very Confident	30%	31%	31%	21%	30%	33%	24%	31%
Somewhat Confident	41%	34%	40%	45%	40%	42%	44%	38%
Not Very Confident	9%	7%	8%	12%	8%	9%	13%	5%
Not At All Confident	4%	6%	3%	12%	4%	2%	7%	3%
High-end grocery store (Whole Foods, Fresh Market, etc.)								
Extremely Confident	19%	26%	20%	11%	18%	15%	18%	27%
Very Confident	33%	30%	34%	26%	32%	38%	29%	33%
Somewhat Confident	37%	31%	36%	44%	37%	38%	41%	34%
Not Very Confident	7%	7%	7%	8%	8%	7%	6%	4%
Not At All Confident	3%	6%	2%	11%	4%	2%	6%	3%
National big box retailer (Wal-Mart, Target)								
Extremely Confident	14%	20%	15%	7%	15%	10%	15%	19%
Very Confident	24%	23%	25%	17%	22%	27%	23%	25%
Somewhat Confident	42%	34%	42%	43%	41%	46%	40%	42%
Not Very Confident	15%	16%	14%	21%	16%	15%	18%	9%
Not At All Confident	5%	8%	4%	12%	6%	2%	5%	5%

Confidence About Appropriate Cleaning Procedures Being Followed (Continued)

- About one-third (32%) of all respondents are extremely or very confident that clothing stores in a local indoor mall are following appropriate cleaning procedures.

	Total	Gender		Age			Annual HHI				Kids <18 in HH	
		Male	Female	Under 35	35-54	55+	<\$40k	\$40k- \$74,999	\$75k- \$124,999	\$125k+	Yes	No
n=	1000	501	499	308	362	330	187	245	294	221	293	613
Clothing store in a local indoor mall (Gap, American Eagle, H&M, Victoria's Secret, etc.)												
Extremely Confident	11%	12%	11%	18%	12%	4%	15%	9%	12%	10%	17%	9%
Very Confident	21%	25%	18%	25%	24%	14%	20%	18%	22%	27%	26%	19%
Somewhat Confident	42%	38%	46%	35%	38%	52%	39%	46%	40%	42%	39%	42%
Not Very Confident	20%	22%	18%	16%	18%	25%	18%	23%	21%	15%	14%	23%
Not At All Confident	6%	4%	8%	6%	8%	4%	8%	5%	5%	6%	4%	6%
Department store (Macy's, Sears, etc.)												
Extremely Confident	12%	12%	11%	15%	15%	5%	16%	9%	11%	12%	17%	10%
Very Confident	22%	25%	19%	25%	23%	18%	21%	20%	24%	24%	29%	19%
Somewhat Confident	45%	42%	47%	37%	43%	55%	40%	49%	44%	45%	40%	47%
Not Very Confident	15%	16%	14%	16%	12%	19%	14%	17%	16%	14%	10%	18%
Not At All Confident	6%	4%	8%	7%	8%	3%	8%	4%	6%	5%	4%	6%
Small retailer in a local outdoor/strip mall (boutique clothing store, etc.)												
Extremely Confident	10%	10%	9%	13%	12%	4%	11%	5%	11%	11%	16%	7%
Very Confident	25%	27%	23%	28%	24%	24%	21%	28%	24%	29%	30%	24%
Somewhat Confident	44%	41%	46%	41%	40%	50%	43%	44%	45%	39%	35%	46%
Not Very Confident	17%	19%	14%	14%	17%	18%	18%	18%	15%	17%	15%	17%
Not At All Confident	5%	3%	7%	4%	7%	4%	7%	4%	5%	4%	4%	5%

Confidence About Appropriate Cleaning Procedures Being Followed (Continued)

- Almost one-half (44%) of respondents who have no concerns about going out in public are extremely or very confident that small retailers in local outdoor/strip malls are following appropriate cleaning procedures.

	Total	Constantly thinking about COVID when out	Current Guidelines/Steps for COVID Protection		Primary Concern About Going Out in Public			
			Very/Somewhat Clear	Somewhat/Very Confusing	Getting ill from COVID	Spreading COVID to others	Others will think I'm acting careless	No concerns
n=	1000	327	879	121	477	226	124	173
Clothing store in a local indoor mall (Gap, American Eagle, H&M, Victoria's Secret, etc.)								
Extremely Confident	11%	14%	11%	8%	10%	9%	10%	17%
Very Confident	21%	20%	22%	17%	20%	23%	22%	21%
Somewhat Confident	42%	36%	42%	45%	40%	45%	42%	45%
Not Very Confident	20%	19%	20%	17%	23%	18%	20%	13%
Not At All Confident	6%	10%	5%	12%	8%	5%	6%	5%
Department store (Macy's, Sears, etc.)								
Extremely Confident	12%	18%	13%	6%	12%	12%	4%	17%
Very Confident	22%	19%	22%	21%	20%	23%	24%	25%
Somewhat Confident	45%	38%	45%	44%	43%	48%	48%	43%
Not Very Confident	15%	17%	15%	17%	19%	13%	12%	10%
Not At All Confident	6%	8%	5%	12%	6%	4%	11%	4%
Small retailer in a local outdoor/strip mall (boutique clothing store, etc.)								
Extremely Confident	10%	13%	10%	7%	9%	6%	7%	16%
Very Confident	25%	21%	26%	20%	23%	28%	24%	28%
Somewhat Confident	44%	40%	44%	43%	40%	50%	46%	42%
Not Very Confident	17%	18%	16%	19%	20%	13%	17%	10%
Not At All Confident	5%	9%	4%	12%	7%	2%	6%	4%

Confidence About Appropriate Cleaning Procedures Being Followed (Continued)

- One-half (48%) of respondents under 35 are extremely or very confident that national electronics/technology stores like Best Buy are following appropriate cleaning procedures.

	Total	Gender		Age			Annual HHI				Kids <18 in HH	
		Male	Female	Under 35	35-54	55+	<\$40k	\$40k-\$74,999	\$75k-\$124,999	\$125k+	Yes	No
n=	1000	501	499	308	362	330	187	245	294	221	293	613
National electronics/technology store (Best Buy, Fry's, etc.)												
Extremely Confident	13%	15%	11%	18%	15%	7%	17%	11%	13%	14%	20%	11%
Very Confident	24%	26%	22%	30%	25%	18%	24%	21%	25%	28%	30%	21%
Somewhat Confident	46%	43%	49%	40%	41%	58%	41%	52%	45%	43%	38%	50%
Not Very Confident	12%	13%	12%	10%	13%	14%	12%	13%	13%	12%	10%	14%
Not At All Confident	4%	2%	6%	3%	7%	3%	7%	3%	4%	4%	3%	5%

	Total	Constantly thinking about COVID when out	Current Guidelines/Steps for COVID Protection		Primary Concern About Going Out in Public			
			Very/Somewhat Clear	Somewhat/Very Confusing	Getting ill from COVID	Spreading COVID to others	Others will think I'm acting careless	No concerns
n=	1000	327	879	121	477	226	124	173
National electronics/technology store (Best Buy, Fry's, etc.)								
Extremely Confident	13%	19%	14%	7%	15%	10%	6%	17%
Very Confident	24%	20%	24%	21%	20%	27%	28%	28%
Somewhat Confident	46%	42%	46%	45%	45%	49%	45%	46%
Not Very Confident	12%	13%	12%	16%	14%	12%	17%	6%
Not At All Confident	4%	7%	4%	10%	6%	3%	3%	3%

Feeling Comfortable Entering a Business

Must-Haves to Feel Comfortable Entering a Business

- Two-thirds of respondents consider hand sanitizer dispensers (68%) and employees wearing masks (67%) as must-haves for feeling comfortable entering businesses such as bookstores, clothing stores, hardware stores, restaurants, etc.



All respondents were asked, "Which of the following are **MUST-HAVES** for you to feel comfortable entering a business such as a bookstore, clothing store, hardware store, restaurant, etc.?" Multiple responses allowed. (n=1000)

Must-Haves to Feel Comfortable Entering a Business (Continued)

- Respondents 55 and older are much more likely than respondents under 35 to feel that employees wearing masks is required for them to feel comfortable entering a business (85% compared to 50% of younger respondents).

	Total	Gender		Age			Annual HHI				Kids <18 in HH	
		Male	Female	Under 35	35-54	55+	<\$40k	\$40k-\$74,999	\$75k-\$124,999	\$125k+	Yes	No
n=	1000	501	499	308	362	330	187	245	294	221	293	613
Hand sanitizer dispensers available for customers to use	68%	63%	73%	54%	66%	82%	67%	75%	61%	67%	61%	74%
Employees wearing masks	67%	65%	69%	50%	66%	85%	67%	70%	61%	69%	58%	74%
Employees regularly and visibly cleaning high-touch areas	63%	59%	67%	47%	65%	76%	57%	66%	60%	68%	59%	68%
Customer wearing masks	61%	58%	63%	47%	58%	77%	57%	66%	55%	62%	53%	67%
An overall clean appearance and smell	55%	54%	57%	43%	53%	70%	55%	58%	55%	53%	47%	62%
Employees wearing gloves	44%	44%	44%	43%	41%	48%	44%	49%	38%	42%	42%	47%
Knowing the business's specific cleaning practices and procedures (e.g. signs, emails, etc. outlining specific procedures)	40%	38%	43%	41%	39%	41%	33%	45%	36%	44%	40%	40%
A sign, sticker, or other indicator of FREQUENT cleaning	37%	37%	37%	34%	34%	43%	38%	38%	32%	38%	33%	40%
A sign, sticker, or other indicator of PROFESSIONAL cleaning	31%	28%	33%	33%	29%	30%	30%	34%	27%	30%	31%	31%
None of these	7%	8%	7%	9%	8%	5%	13%	4%	7%	6%	5%	7%

All respondents were asked, "Which of the following are MUST-HAVES for you to feel comfortable entering a business such as a bookstore, clothing store, hardware store, restaurant, etc.?" Multiple responses allowed.

Must-Haves to Feel Comfortable Entering a Business (Continued)

- Two in five (39%) respondents who constantly think about COVID when out feel that a sign, sticker, or other indicator of PROFESSIONAL cleaning is a must-have to enter a business.

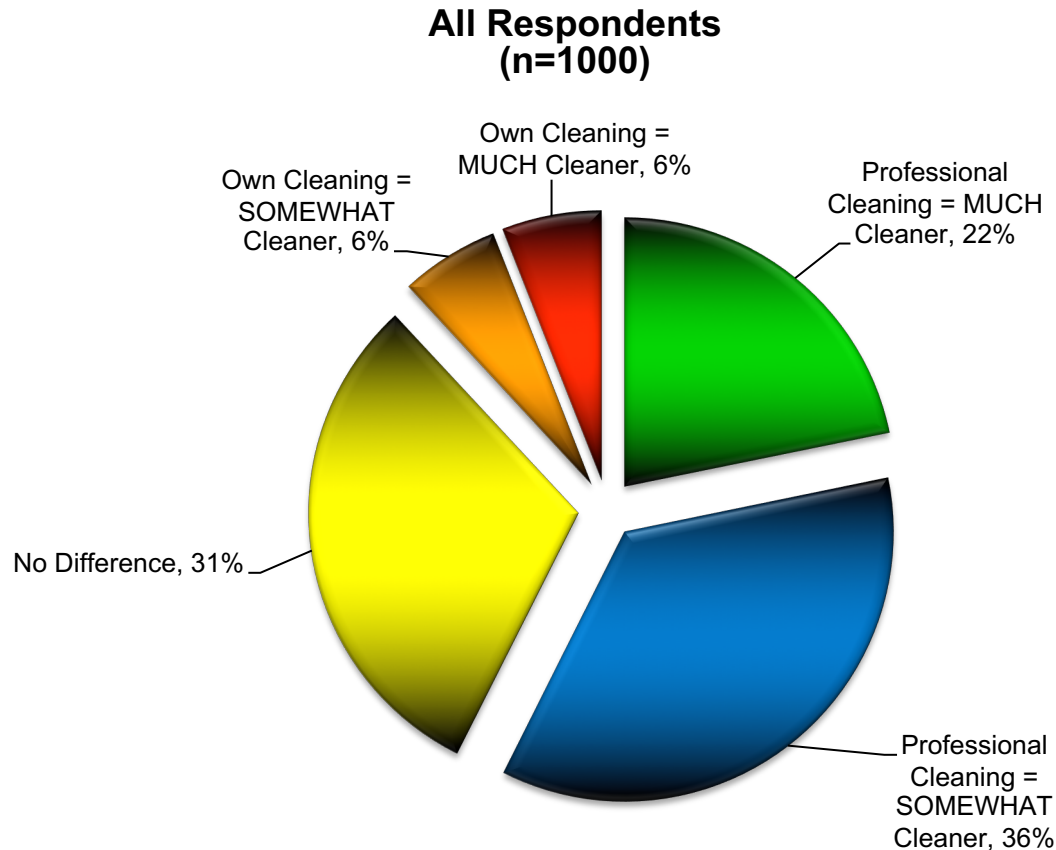
	Total	Constantly thinking about COVID when out	Current Guidelines/Steps for COVID Protection		Primary Concern About Going Out in Public			
			Very/Somewhat Clear	Somewhat/Very Confusing	Getting ill from COVID	Spreading COVID to others	Others will think I am acting careless	No concerns
n=	1000	327	879	121	477	226	124	173
Hand sanitizer dispensers available for customers to use	68%	78%	69%	55%	77%	66%	56%	51%
Employees wearing masks	67%	78%	69%	50%	80%	69%	47%	44%
Employees regularly and visibly cleaning high-touch areas	63%	72%	65%	50%	72%	62%	55%	46%
Customer wearing masks	61%	74%	62%	49%	75%	61%	43%	32%
An overall clean appearance and smell	55%	59%	56%	49%	59%	55%	50%	50%
Employees wearing gloves	44%	56%	46%	31%	56%	42%	32%	22%
Knowing the business's specific cleaning practices and procedures (e.g. signs, emails, etc. outlining specific procedures)	40%	48%	42%	30%	47%	40%	40%	21%
A sign, sticker, or other indicator of FREQUENT cleaning	37%	49%	38%	25%	45%	31%	38%	20%
A sign, sticker, or other indicator of PROFESSIONAL cleaning	31%	39%	32%	21%	35%	30%	33%	16%
None of these	7%	3%	6%	17%	3%	4%	6%	25%

All respondents were asked, "Which of the following are MUST-HAVES for you to feel comfortable entering a business such as a bookstore, clothing store, hardware store, restaurant, etc.?" Multiple responses allowed.

Effectiveness of Commercial Cleaning

Effectiveness of Business Cleaning Approach

- Three in five respondents (58%) think companies that use professional cleaners will be much or somewhat cleaner than those that use their own staff.



All respondents were asked, "Some businesses outsource their cleaning to companies that specialize in commercial cleaning and janitorial services. Other businesses rely on their own employees to clean their facilities. Which statement is most likely to be true?" (n=1000)

Effectiveness of Business Cleaning Approach (Continued)

- Respondents with kids under 18 in their households are much more likely to feel that businesses that use professional cleaning services are likely to be MUCH cleaner than those that handle their own cleaning (30% compared to 18% of those without kids).

	Total	Gender		Age			Annual HHI				Kids <18 in HH	
		Male	Female	Under 35	35-54	55+	<\$40k	\$40k-\$74,999	\$75k-\$124,999	\$125k+	Yes	No
n=	1000	501	499	308	362	330	187	245	294	221	293	613
Businesses that use professional cleaning services are likely to be MUCH cleaner	22%	21%	23%	31%	20%	16%	27%	23%	17%	25%	30%	18%
Businesses that use professional cleaning services are likely to be SOMEWHAT cleaner	36%	39%	32%	34%	32%	41%	25%	40%	39%	36%	33%	37%
There is no real difference in cleanliness	31%	30%	31%	26%	37%	27%	31%	26%	34%	28%	29%	31%
Businesses that handle their own cleaning are likely to be SOMEWHAT cleaner	6%	5%	8%	3%	5%	11%	9%	8%	5%	5%	3%	8%
Businesses that handle their own cleaning are likely to be MUCH cleaner	6%	5%	6%	6%	7%	4%	9%	3%	5%	5%	4%	5%

All respondents were asked, "Some businesses outsource their cleaning to companies that specialize in commercial cleaning and janitorial services. Other businesses rely on their own employees to clean their facilities. Which statement is most likely to be true?"

Effectiveness of Business Cleaning Approach (Continued)

- Among those who feel that current guidelines and steps for COVID protection are somewhat or very confusing, 45% feel that businesses that use professional cleaning services are likely to be much or somewhat cleaner than those who rely on their own employees for cleaning.

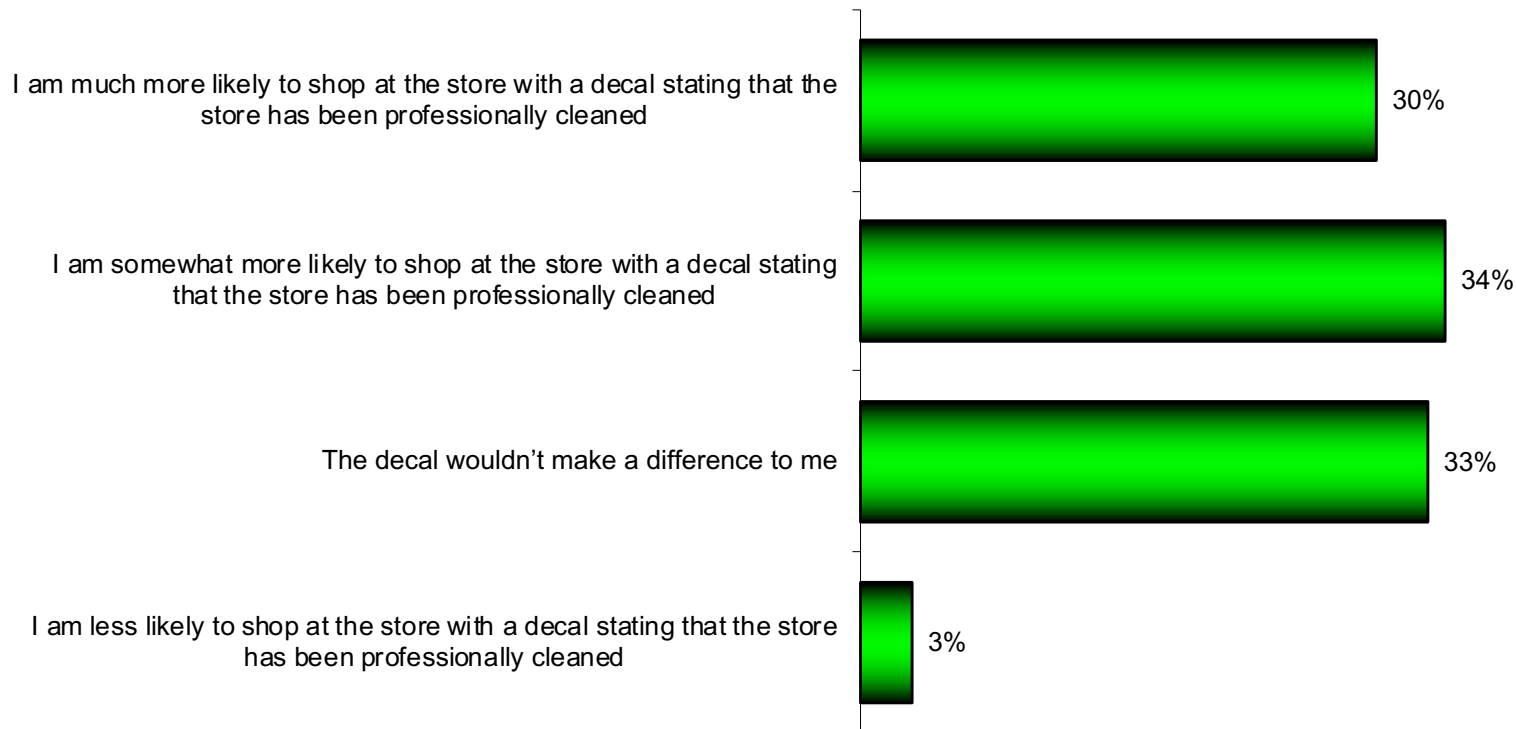
	Total	Constantly thinking about COVID when out	Current Guidelines/Steps for COVID Protection		Primary Concern About Going Out in Public			
			Very/ Somewhat Clear	Somewhat/ Very Confusing	Getting ill from COVID	Spreading COVID to others	Others will think I am acting careless	No concerns
n=	1000	327	879	121	477	226	124	173
Businesses that use professional cleaning services are likely to be MUCH cleaner	22%	29%	23%	14%	28%	19%	13%	16%
Businesses that use professional cleaning services are likely to be SOMEWHAT cleaner	36%	36%	36%	31%	37%	43%	27%	28%
There is no real difference in cleanliness	31%	24%	30%	37%	23%	32%	45%	40%
Businesses that handle their own cleaning are likely to be SOMEWHAT cleaner	6%	6%	6%	7%	8%	3%	10%	5%
Businesses that handle their own cleaning are likely to be MUCH cleaner	6%	5%	5%	11%	5%	4%	4%	11%

All respondents were asked, "Some businesses outsource their cleaning to companies that specialize in commercial cleaning and janitorial services. Other businesses rely on their own employees to clean their facilities. Which statement is most likely to be true?"

Appeal of Decal Indicating Professional Cleaning

Likelihood to Purchase From a Store With/Without a Decal Indicating that it is Professionally Cleaned

- Almost two-thirds (64%) of respondents are much or somewhat more likely to choose to shop at the store that has a decal stating the store has been professionally cleaned.



All respondents were asked, "Consider the following scenario. You are shopping for an item and can buy it at two stores. The stores offer the same prices, same level of customer service, and are both convenient to get to. One store has a decal on the front door indicating that it is professionally cleaned by a commercial cleaning company. The other store has no such decal. All other things equal, which of the following statements is true?" Only one response allowed. (n=1000)

Likelihood to Purchase From a Store With/Without a Decal Indicating that it is Professionally Cleaned (Continued)

- Two in five (40%) respondents under 35 are much more likely to shop at the store with the decal stating it has been professionally cleaned, while 41% of respondents 55 or older feel the decal wouldn't make a difference.

	Total	Gender		Age			Annual HHI				Kids <18 in HH	
		Male	Female	Under 35	35-54	55+	<\$40k	\$40k-\$74,999	\$75k-\$124,999	\$125k+	Yes	No
n=	1000	501	499	308	362	330	187	245	294	221	293	613
I am much more likely to shop at the store with a decal stating that the store has been professional cleaned	30%	29%	31%	40%	27%	25%	35%	29%	30%	30%	35%	27%
I am SOMEWHAT more likely to shop at the store with a decal stating that the store has been professional cleaned	35%	37%	32%	40%	32%	32%	31%	39%	35%	29%	34%	35%
The decal wouldn't make a difference to me	33%	32%	33%	17%	38%	41%	29%	31%	32%	38%	29%	36%
I am less likely to shop at the store with a decal stating that the store has been professionally cleaned	3%	2%	3%	4%	3%	2%	5%	1%	3%	3%	2%	2%

All respondents were asked, "Consider the following scenario. You are shopping for an item and can buy it at two stores. The stores offer the same prices, same level of customer service, and are both convenient to get to. One store has a decal on the front door indicating that it is professionally cleaned by a commercial cleaning company. The other store has no such decal. All other things equal, which of the following statements is true?" Only one response allowed.

Likelihood to Purchase From a Store With/Without a Decal Indicating that it is Professionally Cleaned (Continued)

- Almost one-half (46%) of respondents who constantly think about COVID when they are out in public are much more likely to shop at the store that has a decal stating it has been professionally cleaned.

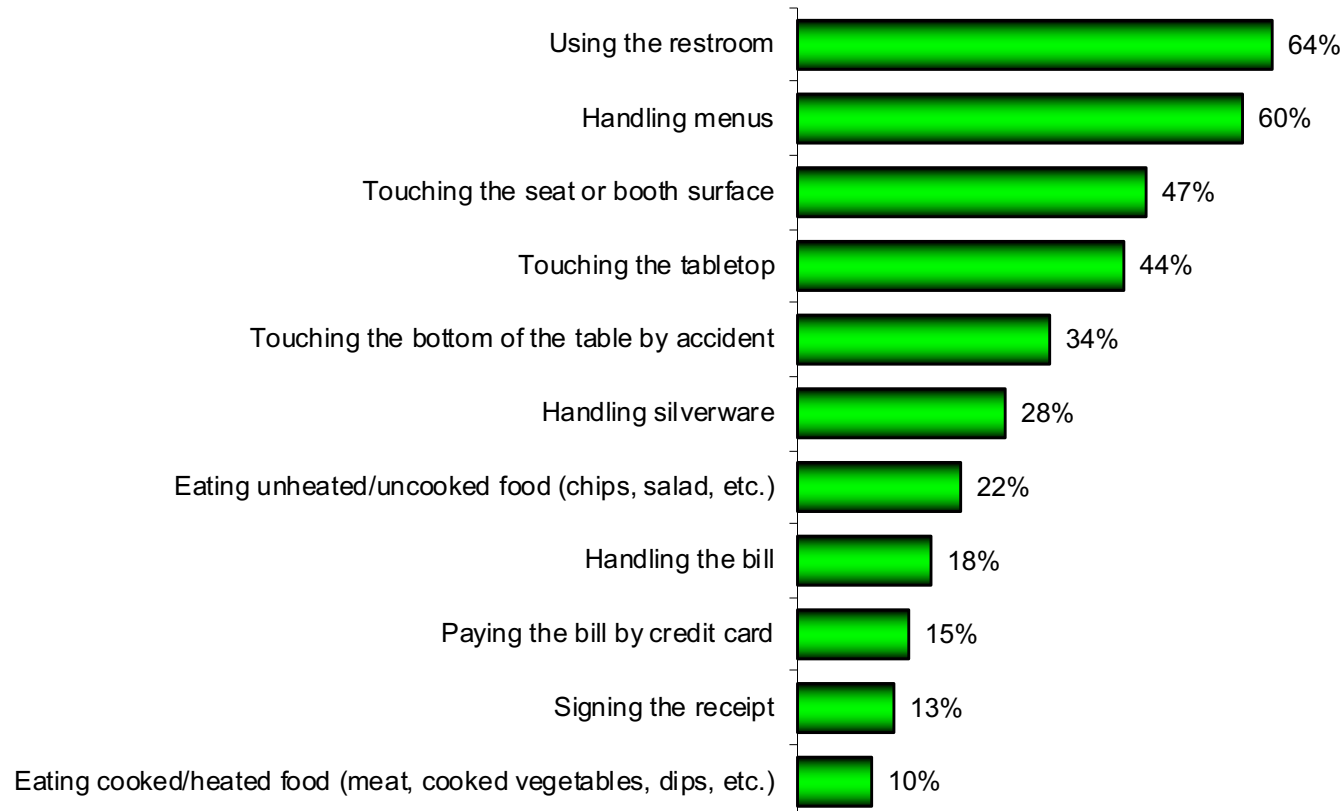
			Current Guidelines/Steps for COVID Protection		Primary Concern About Going Out in Public			
			Very/ Somewhat Clear	Somewhat/ Very Confusing	Getting ill from COVID	Spreading COVID to others	Others will think I am acting careless	No concerns
n=	Total	Constantly thinking about COVID when out	879	121	477	226	124	173
I am much more likely to shop at the store with a decal stating that the store has been professional cleaned	30%	46%	32%	20%	39%	29%	22%	13%
I am SOMEWHAT more likely to shop at the store with a decal stating that the store has been professional cleaned	35%	30%	35%	34%	33%	43%	44%	20%
The decal wouldn't make a difference to me	33%	23%	32%	39%	26%	27%	31%	60%
I am less likely to shop at the store with a decal stating that the store has been professionally cleaned	3%	1%	2%	7%	1%	1%	3%	8%

All respondents were asked, "Consider the following scenario. You are shopping for an item and can buy it at two stores. The stores offer the same prices, same level of customer service, and are both convenient to get to. One store has a decal on the front door indicating that it is professionally cleaned by a commercial cleaning company. The other store has no such decal. All other things equal, which of the following statements is true?" Only one response allowed.

Risk of Touchpoints in Dining Experience

Riskiest Touchpoints/Interactions at a Mid-Scale Restaurant

- Using the restroom (64%) and handling menus (60%) are the top two riskiest touchpoints at a mid-scale restaurant, with three in five selecting each in their top five responses.



All respondents were asked, "If you went out to eat at a mid-scale restaurant (Applebee's, Chili's, Olive Garden, etc.), which of the following interactions and touchpoints would you consider to be riskiest in terms of potential COVID exposure?" Up to 5 responses allowed. (n=1000)

Riskiest Touchpoints/Interactions at a Mid-Scale Restaurant (Continued)

- Older respondents are more concerned about touching menus than younger respondents (75% of respondents 55 or older compared to 44% of respondents under 35).

	Total	Gender		Age			Annual HHI				Kids <18 in HH	
		Male	Female	Under 35	35-54	55+	<\$40k	\$40k-\$74,999	\$75k-\$124,999	\$125k+	Yes	No
n=	1000	501	499	308	362	330	187	245	294	221	293	613
Using the restroom	64%	63%	65%	52%	64%	75%	61%	69%	59%	67%	60%	69%
Handling menus	60%	53%	66%	44%	60%	75%	59%	63%	55%	60%	51%	67%
Touching the seat or booth surface	47%	44%	51%	36%	50%	55%	46%	54%	45%	44%	41%	52%
Touching the tabletop	44%	39%	49%	38%	46%	46%	45%	46%	41%	41%	40%	46%
Touching the bottom of the table by accident	34%	33%	35%	30%	33%	38%	30%	39%	32%	32%	34%	35%
Handling silverware	28%	27%	29%	30%	26%	28%	26%	32%	27%	25%	28%	28%
Eating unheated/uncooked food (chips, salad, etc.)	22%	24%	21%	25%	20%	22%	22%	20%	24%	23%	25%	22%
Handling the bill	18%	19%	17%	20%	16%	18%	23%	19%	18%	14%	20%	16%
Paying the bill by credit card	15%	15%	15%	19%	12%	14%	17%	17%	15%	13%	17%	15%
Signing the receipt	13%	11%	15%	17%	11%	11%	17%	12%	11%	13%	13%	13%
Eating cooked/heated food (meat, cooked vegetables, dips, etc.)	10%	11%	9%	17%	10%	4%	11%	10%	9%	11%	16%	7%

All respondents were asked, "If you went out to eat at a mid-scale restaurant (Applebee's, Chili's, Olive Garden, etc.), which of the following interactions and touchpoints would you consider to be riskiest in terms of potential COVID exposure?" Up to 5 responses allowed.

Riskiest Touchpoints/Interactions at a Mid-Scale Restaurant (Continued)

- Two-thirds (66%) of respondents constantly thinking about COVID when they are out in public feel that handling menus is one of the top five riskiest touchpoints when visiting a mid-scale restaurant.

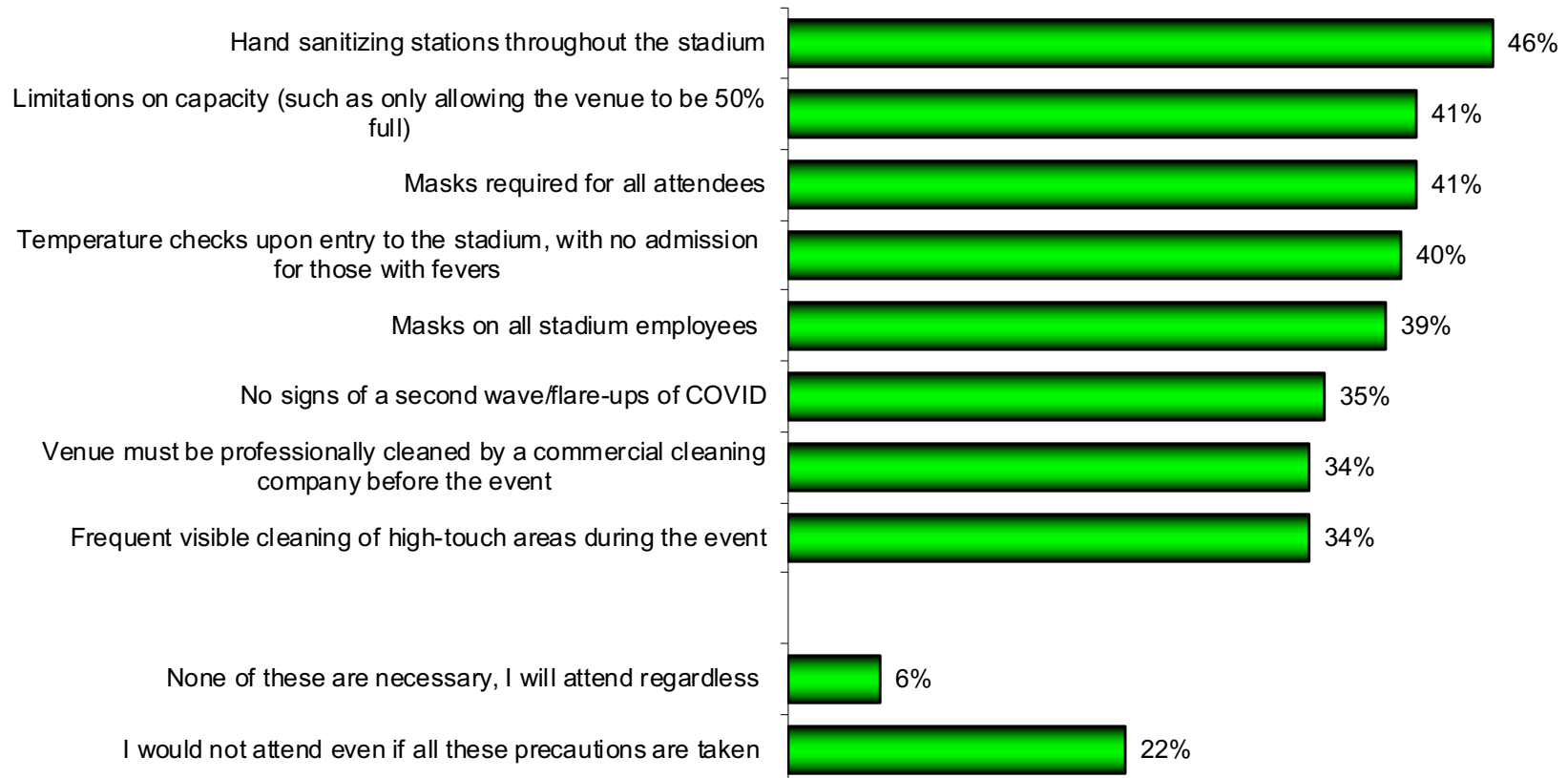
	Total	Constantly thinking about COVID when out	Current Guidelines/Steps for COVID Protection		Primary Concern About Going Out in Public			
			Very/Somewhat Clear	Somewhat/Very Confusing	Getting ill from COVID	Spreading COVID to others	Others will think I am acting careless	No concerns
n=	1000	327	879	121	477	226	124	173
Using the restroom	64%	65%	65%	55%	69%	60%	54%	62%
Handling menus	60%	66%	60%	58%	67%	58%	47%	51%
Touching the seat or booth surface	47%	53%	48%	43%	55%	44%	37%	39%
Touching the tabletop	44%	51%	44%	40%	51%	42%	40%	28%
Touching the bottom of the table by accident	34%	33%	34%	32%	37%	31%	30%	32%
Handling silverware	28%	38%	29%	22%	34%	27%	25%	16%
Eating unheated/uncooked food (chips, salad, etc.)	22%	26%	24%	12%	25%	23%	15%	19%
Handling the bill	18%	22%	18%	19%	21%	18%	19%	9%
Paying the bill by credit card	15%	19%	16%	9%	17%	18%	15%	6%
Signing the receipt	13%	18%	13%	13%	15%	14%	10%	8%
Eating cooked/heated food (meat, cooked vegetables, dips, etc.)	10%	12%	10%	9%	10%	12%	10%	6%

All respondents were asked, "If you went out to eat at a mid-scale restaurant (Applebee's, Chili's, Olive Garden, etc.), which of the following interactions and touchpoints would you consider to be riskiest in terms of potential COVID exposure?" Up to 5 responses allowed.

Necessary Precautions to Attend Public Events

Required Precautions to Feel Safe Attending a Large Event Within 3 Months

- One-fifth (22%) of respondents would not attend a large event within 3 months even if all precautions listed were put in place.



All respondents were asked, "Assume that you purchased tickets several months ago to a large publicly attended event that you were very excited about, such as a football game or concert. The event is scheduled for early September, about three months from now. Which of the following precautions must be in place for you to be comfortable attending this event in three months?" Multiple responses allowed. (n=1000)

Required Precautions to Feel Safe Attending a Large Event Within 3 Months (Continued)

- One-third (33%) of respondents under 35 consider required masks on all stadium employees a precaution that must be in place for them to be comfortable attending a large event within three months.

	Total	Gender		Age			Annual HHI				Kids <18 in HH	
		Male	Female	Under 35	35-54	55+	<\$40k	\$40k-\$74,999	\$75k-\$124,999	\$125k+	Yes	No
n=	1000	501	499	308	362	330	187	245	294	221	293	613
Hand sanitizing stations throughout the stadium	46%	43%	49%	44%	43%	52%	47%	46%	44%	48%	49%	47%
Limitations on capacity (such as only allowing the venue to be 50% full)	41%	40%	42%	40%	42%	41%	41%	42%	39%	43%	45%	41%
Masks required for all attendees	41%	40%	42%	40%	38%	45%	44%	40%	39%	40%	44%	42%
Temperature checks upon entry to the stadium, with no admission for those with fevers	40%	38%	41%	36%	38%	44%	39%	39%	39%	40%	39%	42%
Masks on all stadium employees	39%	38%	40%	33%	37%	46%	40%	39%	36%	39%	37%	42%
No signs of a second wave/flare-ups of COVID	35%	34%	36%	24%	35%	45%	30%	35%	37%	36%	29%	40%

All respondents were asked, "Assume that you purchased tickets several months ago to a large publicly attended event that you were very excited about, such as a football game or concert. The event is scheduled for early September, about three months from now. Which of the following precautions must be in place for you to be comfortable attending this event in three months?" Multiple responses allowed.

Required Precautions to Feel Safe Attending a Large Event Within 3 Months (Continued)

- One-third (32%) of respondents who have no concerns about going out in public still would consider hand sanitizing stations throughout the stadium a precaution that must be in place to attend a large event within three months.

			Current Guidelines/Steps for COVID Protection		Primary Concern About Going Out in Public			
			Very/ Somewhat Clear	Somewhat/ Very Confusing	Getting ill from COVID	Spreading COVID to others	Others will think I am acting careless	No concerns
n=	1000	327	879	121	477	226	124	173
Hand sanitizing stations throughout the stadium	46%	46%	48%	33%	51%	51%	39%	32%
Limitations on capacity (such as only allowing the venue to be 50% full)	41%	48%	43%	27%	53%	37%	30%	23%
Masks required for all attendees	41%	47%	43%	27%	49%	42%	34%	21%
Temperature checks upon entry to the stadium, with no admission for those with fevers	40%	42%	41%	31%	46%	35%	44%	25%
Masks on all stadium employees	39%	42%	41%	24%	46%	40%	33%	22%
No signs of a second wave/flare-ups of COVID	35%	36%	36%	26%	41%	33%	30%	25%

All respondents were asked, "Assume that you purchased tickets several months ago to a large publicly attended event that you were very excited about, such as a football game or concert. The event is scheduled for early September, about three months from now. Which of the following precautions must be in place for you to be comfortable attending this event in three months?" Multiple responses allowed.

Required Precautions to Feel Safe Attending a Large Event Within 3 Months (Continued)

- One-quarter (26%) of respondents without kids under 18 in their households would not attend a large event even if all these precautions were in place.

	Total	Gender		Age			Annual HHI				Kids <18 in HH	
		Male	Female	Under 35	35-54	55+	<\$40k	\$40k-\$74,999	\$75k-\$124,999	\$125k+	Yes	No
n=	1000	501	499	308	362	330	187	245	294	221	293	613
Frequent visible cleaning of high-touch areas during the event	34%	32%	36%	28%	34%	39%	30%	37%	31%	34%	33%	36%
Venue must be professionally cleaned by a commercial cleaning company before the event	34%	33%	34%	35%	31%	35%	35%	36%	33%	33%	33%	35%
None of these are necessary, I will attend regardless	6%	7%	5%	6%	7%	5%	5%	5%	8%	5%	5%	7%
I would not attend even if all these precautions are taken	22%	18%	26%	12%	24%	29%	26%	24%	20%	20%	12%	26%

All respondents were asked, "Assume that you purchased tickets several months ago to a large publicly attended event that you were very excited about, such as a football game or concert. The event is scheduled for early September, about three months from now. Which of the following precautions must be in place for you to be comfortable attending this event in three months?" Multiple responses allowed.

Required Precautions to Feel Safe Attending a Large Event Within 3 Months (Continued)

- Two in five (38%) respondents who constantly think about COVID when out in public feel that the venue must be professionally cleaned by a commercial cleaning company before the event before they would attend.

	Total	Constantly thinking about COVID when out	Current Guidelines/Steps for COVID Protection		Primary Concern About Going Out in Public			
			Very/Somewhat Clear	Somewhat/Very Confusing	Getting ill from COVID	Spreading COVID to others	Others will think I am acting careless	No concerns
n=	1000	327	879	121	477	226	124	173
Frequent visible cleaning of high-touch areas during the event	34%	35%	34%	33%	38%	36%	28%	24%
Venue must be professionally cleaned by a commercial cleaning company before the event	34%	38%	34%	28%	38%	34%	33%	21%
None of these are necessary, I will attend regardless	6%	2%	5%	12%	1%	3%	6%	23%
I would not attend even if all these precautions are taken	22%	29%	21%	28%	25%	19%	17%	23%

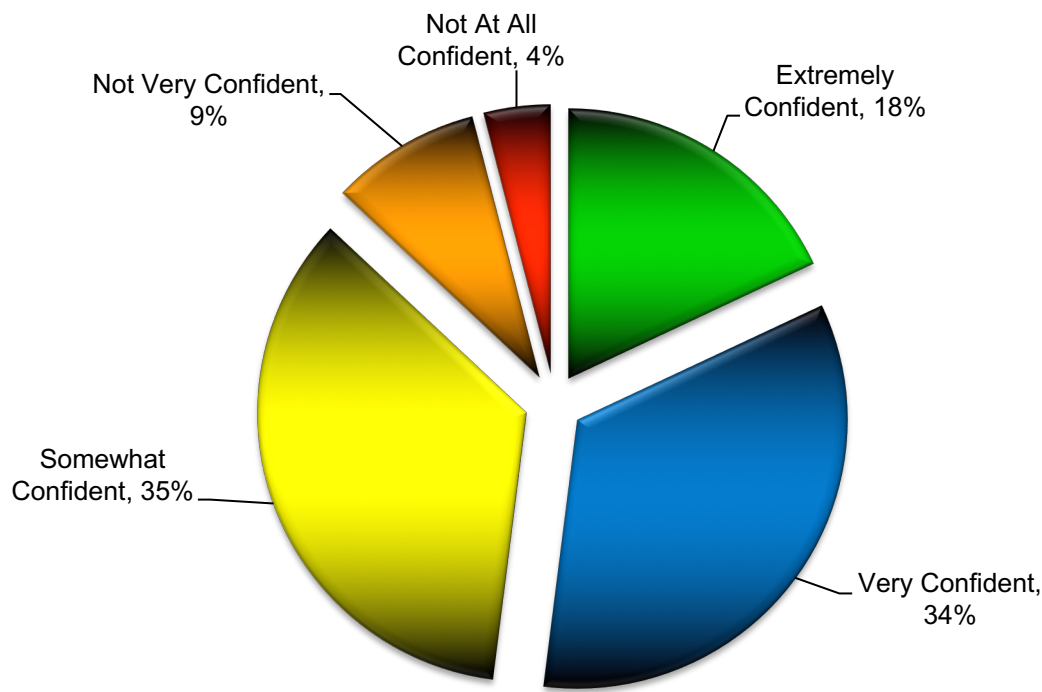
All respondents were asked, "Assume that you purchased tickets several months ago to a large publicly attended event that you were very excited about, such as a football game or concert. The event is scheduled for early September, about three months from now. Which of the following precautions must be in place for you to be comfortable attending this event in three months?" Multiple responses allowed.

Confidence in Employer Procedures (Employee Point of View)

Confidence in Employer's Cleaning Procedure to Keep YOU Safe and Healthy as a Customer-Facing Retail Employee

- Among respondents who work or will be working in customer-facing retail environments, about one-half (52%) feel extremely or very confident about the cleaning procedures their employers have put into place to keep them safe and healthy.

**Respondents in Customer-Facing Environments
(n=536)**



All respondents were asked, "If you are working, or will soon be working, in a CUSTOMER-FACING RETAIL environment such as a store or restaurant, how confident are you about the cleaning procedures your employer has put in place to keep YOU safe and healthy?" Results shown among customer-facing employees only. (n=536)

Confidence in Employer’s Cleaning Procedure to Keep YOU Safe and Healthy as a Customer-Facing Retail Employee (Continued)

- Among customer-facing retail employees with household incomes \$125k or more, one-quarter (26%) feel extremely confident their employer is putting effective cleaning procedures in place to keep them safe and healthy.

	Total	Gender		Age			Annual HHI				Kids <18 in HH	
		Male	Female	Under 35	35-54	55+	<\$40k	\$40k-\$74,999	\$75k-\$124,999	\$125k+	Yes	No
n=	536	298	238	250	205	81	92	124	176	121	212	263
Extremely confident	18%	21%	15%	21%	19%	10%	16%	17%	16%	26%	23%	15%
Very confident	34%	35%	34%	33%	36%	33%	37%	33%	36%	30%	35%	33%
Somewhat confident	35%	32%	40%	36%	33%	41%	33%	37%	36%	34%	33%	38%
Not very confident	9%	9%	8%	7%	9%	14%	10%	9%	9%	6%	8%	10%
Not at all confident	4%	4%	3%	4%	4%	2%	4%	4%	2%	5%	2%	5%

All respondents were asked, “If you are working, or will soon be working, in a CUSTOMER-FACING RETAIL environment such as a store or restaurant, how confident are you about the cleaning procedures your employer has put in place to keep YOU safe and healthy?” Results shown among customer-facing employees only.

Confidence in Employer’s Cleaning Procedure to Keep YOU Safe and Healthy as a Customer-Facing Retail Employee (Continued)

- One-quarter (24%) of customer facing retail employees who find current guidelines and steps for COVID protection somewhat or very confusing are not very or not at all confident their employer is taking the necessary steps to keep them safe and healthy.

			Current Guidelines/Steps for COVID Protection		Primary Concern About Going Out in Public			
			Very/Somewhat Clear	Somewhat/Very Confusing	Getting ill from COVID	Spreading COVID to others	Others will think I am acting careless	No concerns
n=	536	173	475	61	226	150	89	71
Extremely confident	18%	28%	19%	15%	29%	10%	6%	18%
Very confident	34%	28%	35%	28%	26%	43%	32%	45%
Somewhat confident	35%	30%	36%	34%	32%	35%	51%	30%
Not very confident	9%	12%	8%	12%	10%	9%	8%	4%
Not at all confident	4%	3%	3%	12%	4%	3%	5%	3%

All respondents were asked, “If you are working, or will soon be working, in a CUSTOMER-FACING RETAIL environment such as a store or restaurant, how confident are you about the cleaning procedures your employer has put in place to keep YOU safe and healthy?” Results shown among customer-facing employees only.

Respondent Profile

Respondent Profile

	Gender			Age			Annual HHI				Kids <18 in HH	
	Total	Male	Female	Under 35	35-54	55+	<\$40k	\$40k-\$74,999	\$75k-\$124,999	\$125k+	Yes	No
n=	1000	501	499	308	362	330	187	245	294	221	293	613
Gender												
Male	50%	100%	0%	51%	48%	51%	41%	48%	56%	57%	53%	49%
Female	50%	0%	100%	49%	52%	49%	59%	52%	44%	43%	47%	51%
Age												
18-24	13%	14%	12%	42%	0%	0%	16%	17%	10%	8%	15%	10%
25-29	9%	9%	9%	29%	0%	0%	10%	11%	10%	6%	12%	7%
30-34	9%	9%	9%	29%	0%	0%	10%	7%	11%	8%	13%	5%
35-39	9%	8%	10%	0%	25%	0%	7%	8%	11%	10%	16%	6%
40-44	9%	9%	9%	0%	25%	0%	9%	4%	10%	14%	17%	5%
45-49	9%	9%	9%	0%	25%	0%	8%	8%	11%	11%	15%	7%
50-54	9%	8%	10%	0%	25%	0%	8%	5%	10%	13%	8%	10%
55 or older	33%	34%	32%	0%	0%	100%	33%	40%	28%	30%	3%	50%
Annual Household Income												
<\$40k	20%	16%	24%	22%	17%	20%	100%	0%	0%	0%	14%	22%
\$40k-\$74,999	26%	24%	28%	30%	17%	32%	0%	100%	0%	0%	18%	30%
\$75k-\$99,999	20%	22%	18%	21%	21%	18%	0%	0%	64%	0%	22%	20%
\$100k-\$124,999	11%	12%	10%	10%	14%	8%	0%	0%	36%	0%	13%	10%
\$125k-\$149,999	8%	9%	7%	8%	10%	7%	0%	0%	0%	35%	11%	7%
\$150k-\$200k	9%	9%	10%	6%	13%	9%	0%	0%	0%	40%	14%	8%
>\$200k	6%	8%	4%	3%	8%	5%	0%	0%	0%	25%	8%	4%

Respondent Profile (Continued)

			Current Guidelines/Steps for COVID Protection		Primary Concern About Going Out in Public			
			Total	Constantly thinking about COVID when out	Very/Somewhat Clear	Somewhat/Very Confusing	Getting ill from COVID	Spreading COVID to others
n=	1000	327	879	121	477	226	124	173
Gender								
Male	50%	45%	50%	52%	50%	50%	47%	53%
Female	50%	55%	50%	48%	50%	50%	53%	47%
Age								
18-24	13%	12%	14%	8%	11%	17%	20%	9%
25-29	9%	10%	9%	6%	9%	12%	11%	4%
30-34	9%	8%	9%	9%	7%	12%	8%	10%
35-39	9%	12%	9%	11%	8%	12%	9%	6%
40-44	9%	9%	9%	8%	8%	11%	10%	9%
45-49	9%	9%	9%	7%	8%	9%	12%	12%
50-54	9%	7%	9%	12%	9%	8%	12%	10%
55 or older	33%	33%	32%	38%	42%	18%	17%	39%
Annual Household Income								
<\$40k	20%	22%	21%	14%	19%	16%	19%	27%
\$40k-\$74,999	26%	28%	25%	29%	28%	25%	26%	20%
\$75k-\$99,999	20%	18%	20%	23%	17%	26%	16%	23%
\$100k-\$124,999	11%	10%	12%	8%	12%	9%	14%	9%
\$125k-\$149,999	8%	8%	8%	10%	7%	11%	7%	8%
\$150k-\$200k	9%	9%	9%	9%	10%	9%	10%	7%
>\$200k	6%	5%	6%	8%	6%	5%	7%	6%

Respondent Profile (Continued)

	Gender			Age			Annual HHI				Kids <18 in HH	
	Total	Male	Female	Under 35	35-54	55+	<\$40k	\$40k-\$74,999	\$75k-\$124,999	\$125k+	Yes	No
n=	1000	501	499	308	362	330	187	245	294	221	293	613
Highest Level of Education												
Some high school or less	2%	1%	3%	5%	1%	1%	7%	1%	0%	0%	2%	2%
High school graduate	16%	14%	18%	20%	12%	17%	34%	16%	13%	5%	13%	17%
Some college or currently in college	22%	20%	23%	25%	18%	23%	27%	29%	18%	12%	18%	24%
Undergraduate college degree	29%	31%	27%	20%	35%	31%	19%	27%	36%	31%	26%	31%
Post graduate degree	24%	25%	23%	19%	27%	25%	10%	18%	25%	44%	30%	21%
Some post graduate	7%	7%	6%	10%	6%	3%	2%	8%	7%	7%	9%	5%
Prefer not to say	1%	0%	1%	0%	1%	0%	1%	0%	0%	0%	1%	0%
Relationship Status												
Married	52%	56%	49%	26%	59%	70%	27%	51%	57%	72%	67%	49%
Single	28%	29%	27%	57%	23%	7%	42%	29%	28%	14%	18%	30%
Living with significant other	8%	7%	8%	13%	7%	3%	9%	9%	7%	6%	9%	7%
Divorced	6%	4%	9%	1%	7%	10%	12%	6%	3%	4%	3%	8%
Widowed	4%	2%	5%	0%	1%	9%	10%	3%	2%	1%	0%	6%
Separated	1%	1%	2%	2%	2%	1%	1%	1%	2%	1%	3%	1%
Prefer not to say	1%	1%	1%	2%	1%	0%	0%	0%	0%	1%	0%	0%
Kids Under 18 in Household												
Yes	32%	34%	31%	47%	49%	3%	23%	23%	37%	47%	100%	0%
No	68%	66%	69%	53%	51%	97%	77%	77%	63%	53%	0%	100%

Respondent Profile (Continued)

	Total	Constantly thinking about COVID when out	Current Guidelines/Steps for COVID Protection		Primary Concern About Going Out in Public			
			Very/Somewhat Clear	Somewhat/Very Confusing	Getting ill from COVID	Spreading COVID to others	Others will think I am acting careless	No concerns
n=	1000	327	879	121	477	226	124	173
Highest Level of Education								
Some high school or less	2%	2%	2%	1%	2%	1%	3%	3%
High school graduate	16%	16%	16%	18%	16%	12%	19%	20%
Some college or currently in college	22%	23%	22%	17%	21%	19%	24%	23%
Undergraduate college degree	29%	25%	29%	29%	28%	35%	23%	28%
Some post graduate	7%	5%	6%	9%	4%	11%	10%	5%
Post graduate degree	24%	29%	24%	24%	28%	21%	18%	20%
Prefer not to say	1%	0%	0%	2%	0%	0%	2%	1%
Relationship Status								
Married	52%	50%	52%	53%	57%	49%	41%	52%
Living with significant other	8%	9%	8%	7%	6%	10%	10%	6%
Single	28%	30%	29%	26%	25%	33%	35%	26%
Divorced	6%	6%	6%	7%	6%	5%	6%	10%
Separated	1%	1%	1%	4%	1%	1%	4%	0%
Widowed	4%	4%	4%	2%	5%	1%	2%	5%
Prefer not to say	1%	0%	1%	2%	0%	0%	2%	1%
Kids Under 18 in Household								
Yes	32%	31%	33%	23%	26%	41%	44%	29%
No	68%	69%	67%	77%	74%	59%	56%	71%

Respondent Profile (Continued)

	Total	Gender		Age			Annual HHI				Kids <18 in HH	
		Male	Female	Under 35	35-54	55+	<\$40k	\$40k-\$74,999	\$75k-\$124,999	\$125k+	Yes	No
n=	1000	501	499	308	362	330	187	245	294	221	293	613
Ethnicity												
African American	10%	10%	10%	24%	7%	1%	13%	13%	9%	7%	15%	8%
Asian	9%	11%	7%	12%	12%	4%	9%	8%	11%	10%	11%	7%
Caucasian	71%	69%	72%	46%	72%	92%	68%	69%	70%	75%	60%	78%
Hispanic/Latino	7%	8%	6%	14%	7%	1%	6%	9%	9%	4%	11%	5%
Other	2%	1%	2%	3%	1%	1%	3%	1%	1%	2%	2%	1%
Prefer not to say	1%	0%	2%	1%	1%	1%	1%	1%	0%	1%	0%	1%
Region												
Midwest	23%	20%	26%	22%	24%	23%	24%	24%	20%	26%	25%	23%
Northeast	18%	14%	22%	16%	17%	21%	15%	16%	21%	20%	19%	18%
West	23%	29%	18%	21%	23%	25%	17%	25%	26%	23%	20%	25%
South	36%	37%	34%	41%	36%	30%	45%	36%	32%	30%	37%	34%

Respondent Profile (Continued)

			Current Guidelines/Steps for COVID Protection		Primary Concern About Going Out in Public			
			Very/ Somewhat Clear	Somewhat/ Very Confusing	Getting ill from COVID	Spreading COVID to others	Others will think I am acting careless	No concerns
n=	1000	327	879	121	477	226	124	173
Ethnicity								
African American	10%	10%	11%	8%	8%	13%	17%	8%
Asian	9%	11%	9%	12%	11%	10%	7%	5%
Caucasian	71%	67%	71%	68%	71%	66%	65%	78%
Hispanic/Latino	7%	9%	7%	5%	7%	9%	9%	4%
Other	2%	1%	1%	3%	1%	1%	2%	4%
Prefer not to say	1%	1%	1%	3%	2%	0%	0%	1%
Region								
Midwest	23%	20%	24%	13%	22%	27%	26%	18%
Northeast	18%	21%	18%	19%	19%	19%	19%	15%
West	23%	21%	23%	26%	24%	20%	23%	25%
South	36%	39%	35%	42%	35%	34%	32%	41%