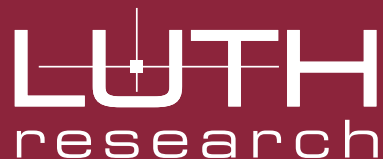

METHODOLOGY

“No man is an island.” At Luth Research, we believe in connecting the minds and voices of people in finding the way forward during this challenging time. Starting this week, we are sharing a few brief insights from our community of panelists.

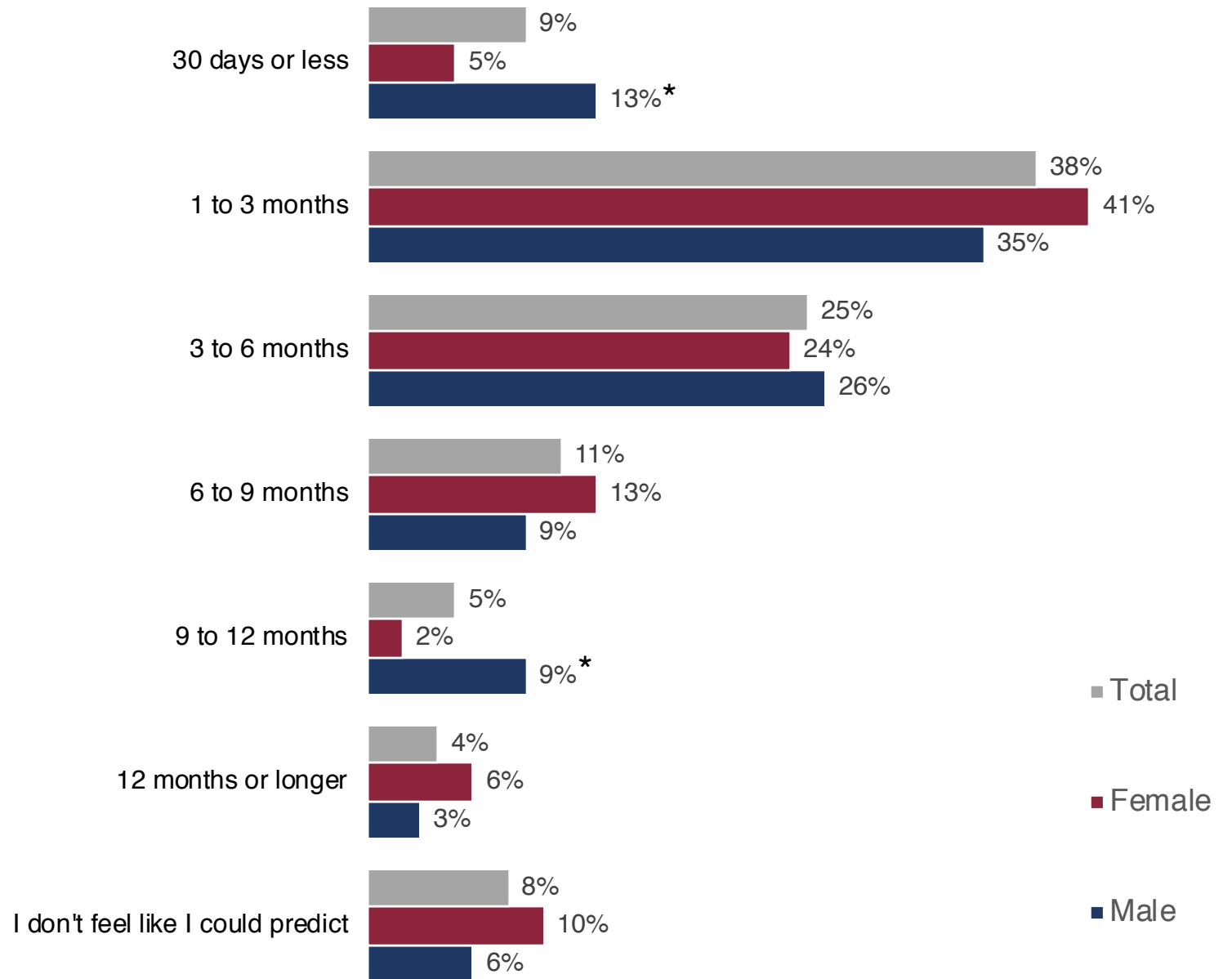
These insights were collected on Thursday, March 19, 2020 and are based on a sample of N300 to N500 balanced to mirror the demographics of the U.S. online population.



How long will it take for the U.S. coronavirus outbreak to start declining?

Close to 40% of people expect to see the start of decline in 1 to 3 months.

Interestingly, the main difference in opinions is found between men and women. Specifically, men tend to think either very optimistically or rather pessimistically as they spike in mentioning 30 days or less, or 9 to 12 months. People seem to share similar trends in their prediction regardless of age, race and income.



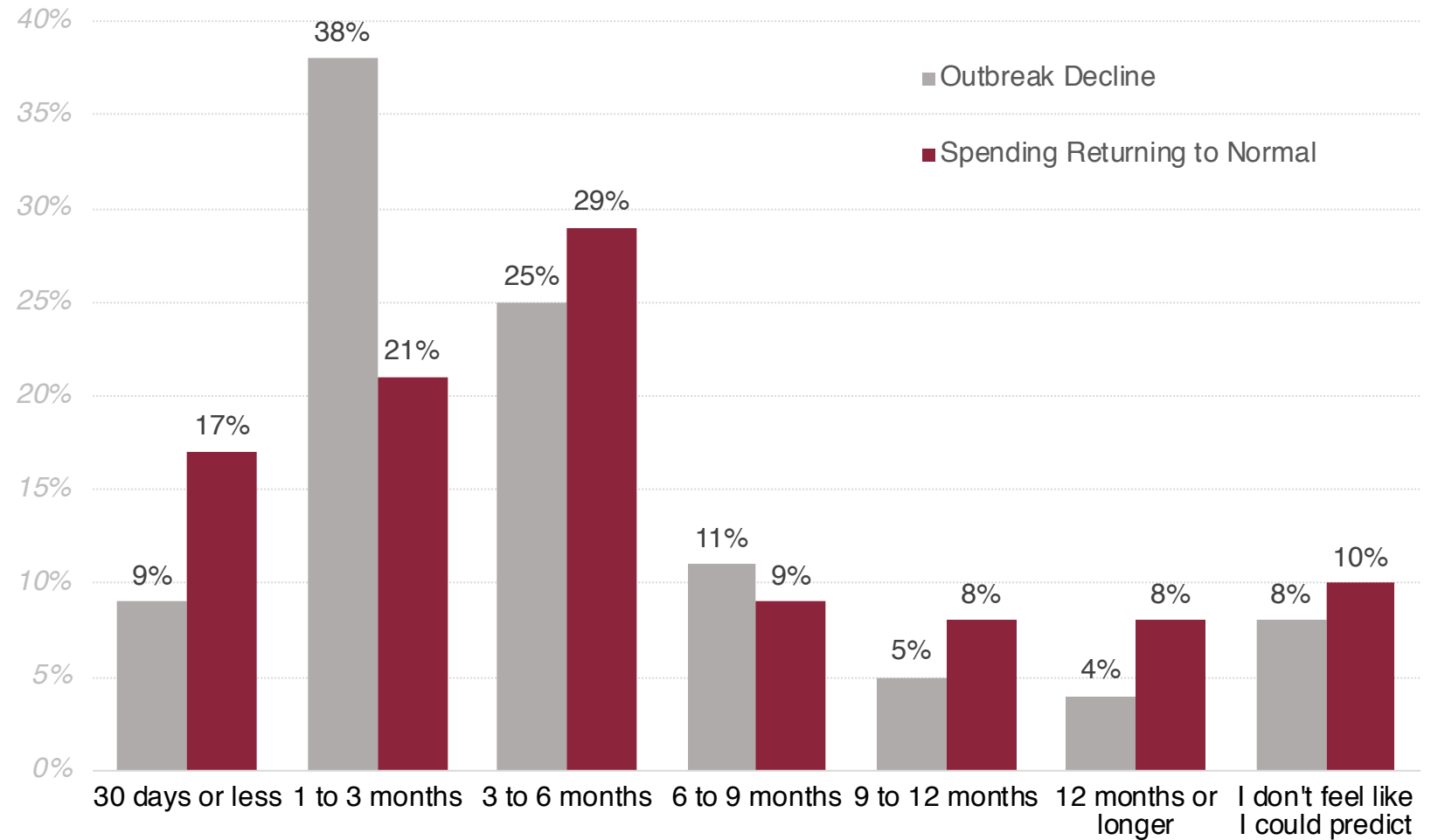
*Statistically significant at 95% confidence level

How long will it take you to get back to your normal spending before the coronavirus outbreak?

In this first official week of national social distancing, we see a double digit percentage indicating their intent to return to normal spending in 30 days or less despite that only 9% predict the start of the virus decline in the same timeframe.

Similarly, people from all demographic backgrounds regardless of gender, age, race and income hold similar views.

Timelines for Virus Starting to Decline vs. Spending Returning to Normal



In which categories are you currently spending more, less or the same?

As expected, grocery, health & personal care, and pet supplies lead the categories where heavier consumer spending is seen. On the other hand, automotive, clothing & accessories, beauty, luggage & travel accessories are hit hard. Categories expected to maintain relatively normal spending are baby products, camera & photo, personal computers, software, and toys.

	MORE	LESS	SAME
Automotive/car	5%	1 40%	52%
Baby	6%	13%	1 78%
Beauty	5%	3 31%	60%
Books	6%	22%	68%
Camera & Photo	2%	22%	2 72%
Clothing & Accessories	6%	2 38%	53%
Consumer Electronics	7%	30%	59%
Games (video games, online games, mobile games, etc.)	10%	25%	62%
Grocery & Gourmet Foods	1 41%	21%	35%
Health & Personal Care	2 30%	21%	46%
Home & Garden	7%	27%	62%
Luggage & Travel Accessories	3%	3 31%	62%
Movies & TV Shows downloads (digital purchases)	15%	22%	60%
Music	8%	22%	67%
Office Products	8%	25%	63%
Outdoors	5%	27%	64%
Personal Computers	5%	22%	3 70%
Pet Supplies	3 18%	14%	64%
Shoes, Handbags, & Sunglasses	3%	30%	64%
Software	4%	22%	3 70%
Sports	2%	29%	65%
Streaming Entertainment Services (e.g. Netflix, Disney+, Hulu, Spotify, etc.)	14%	15%	68%
Tools & Home Improvement	8%	25%	64%
Toys	4%	23%	3 70%

What's the single most significant change you will make in your life after the coronavirus crisis?

"Will keep things cleaner."

"Be more social and go out on dates."

"Continue to show concern and care for other people's needs."

"Be kinder to people. Try to have more in savings in case something happens again."

"Take nothing for granted, there will always be change."

"Prepare for the unexpected."

"Elect government officials who will plan and try to head off the next pandemic."

"Being more grateful for what I have."

"Start to spend money on things that I really enjoy."

"Always stock up on toilet paper! I can't find any where I live."

"Put more money in my emergency fund."

"Living in a house and not an apartment."

"Enjoy life more."

"I don't think it will lead to any changes specifically but I will definitely appreciate local businesses more."

"Stay healthy."

"I will build up a supply of essential items like toilet paper and laundry detergent."

"Work harder to get our business back up and running."