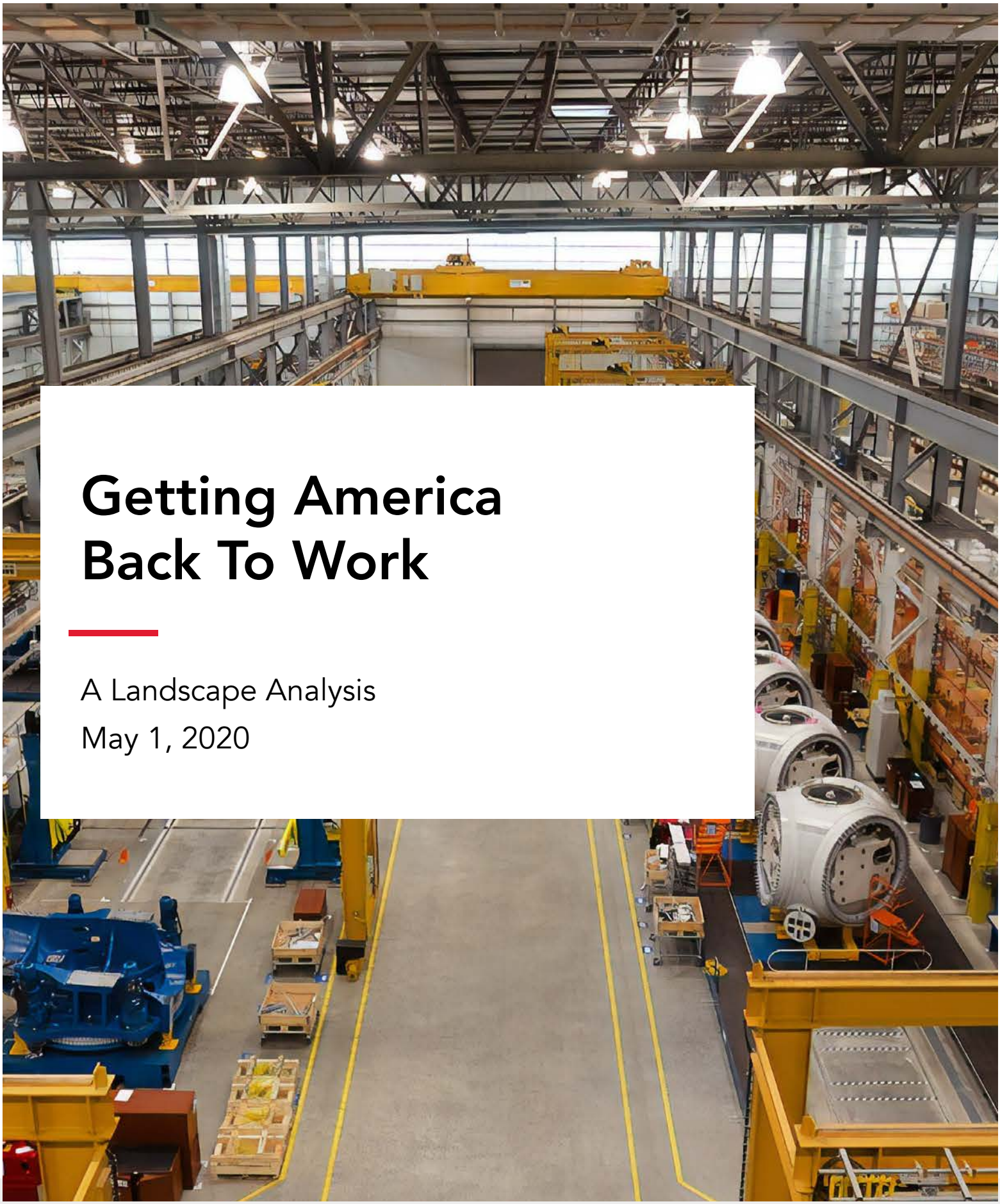

Getting America Back To Work

A Landscape Analysis

May 1, 2020

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The Paths to Reopening

Federal and state governments along with private sector leaders continue to chart separate pathways back from the COVID-19 shutdown, while public health officials work to develop a vaccine.

Testing and tracing capacity continues to be at the forefront of leaders' minds as Americans sharply divide politically and prepare for months-long shutdowns.

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GPG's Latest Research

The Glover Park Group's Research and Insights practice conducted a 60-minute online caucus on April 20, 2020, among 314 news attentive and civically engaged voters nationwide.

Our research found:

- Americans are cautious about reopening and are not willing to put their health on the line.
- To ease anxieties about a second wave, both Democrats and Republicans rank access to a vaccine, diagnostic testing and a decrease in new infections as the three most important preconditions to open the country safely.
- Among different approaches to reopening society, Americans are most likely to support comprehensive antibody testing and a staggered return, but express strong reservations about track and trace programs due to anxieties about data privacy and security that predate the coronavirus pandemic.
- Americans are carefully watching how companies manage the immediate health crisis but are also weighing whether companies are showing their expressed values in deciding how and when to return to work.

KEY STATS

2 in 3

participants support antibody testing to determine who can return to society

8 in 10

have been impacted professionally or economically or know someone who has

8 in 10

expect this to be the 'beginning' or 'middle' and are prepared for many months ahead

9 in 10

anticipate a second wave of infection

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Government

Following release of the White House "Guidelines for Opening Up America Again" on April 16, state governments have begun preparing their own reopening plans, with some loosening closure restrictions as early as May 1.

COVID-19 is dividing the country as state plans diverge along political lines and a growing urban-rural split is emerging.

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Government

On April 27, President Trump unveiled coronavirus testing plans that will require federal, state, and private sector coordination in three stages: Launch, scale, and support reopening. The first two stages summarize steps that the administration has already taken, while the third stage details a plan for the federal government to "coordinate with governors to support testing plans and rapid response programs." The plan says that continued support from the federal government will include:

- Expedited regulatory approvals for tests and testing equipment;
- Research and development of diagnostic tests; and
- Updated procedural guidance for administrating tests.

The overview makes clear that the federal government will act as a "supplier of last resort" when it comes to testing.

The CDC has issued new guidelines on cleaning and disinfecting. The guidance released by the CDC applies to workplaces, schools, and homes and was developed with the Environmental Protection Agency (EPA). The guidance recommends heavily-touched hard indoor surfaces like glass, metal, and plastic be cleaned using EPA-approved disinfectants on a high rotation. All other surfaces are recommended for regular, frequent cleaning.

As of now, zero states have met federal criteria for reopening. These guidelines suggest states exhibit 14 consecutive days of decline in new COVID-19 cases before relaxing the stay-at-home orders. Still, some states have already begun reopening, largely along party lines – Republican governors are eager while Democrats are more cautious.

- New York has seen the most consecutive days of declining new cases. Governor Andrew Cuomo will not reopen any part of the state before May 15.
- Georgia began relaxing stay-at-home orders on April 24 after seeing five consecutive days of declining cases that ended on April 15.
- Texas, which has not seen more than two consecutive days of case declines, relaxed restrictions May 1, with restaurants, movie theaters, and malls allowed to open with limited capacity.

Not all counties will reopen with their state.

- Atlanta's mayor called on Georgia Governor Brian Kemp to rescind his order to allow certain businesses to reopen.
- Missouri's stay-at-home order expires on May 4, but Kansas City's mayor indicated that a local order would remain in effect until May 15.
- Colorado began reopening on April 27, but most metro Denver counties have extended their stay-at-home orders until May 8.
- Nashville has yet to specify a date for its nonessential businesses to reopen.
- In Florida, Broward, Miami-Dade and Palm Beach counties remain closed while the state reopens.

As citizens struggle with the public health restrictions some have resisted the measures. In Lansing, Michigan, armed protests have challenged the shutdown measures. Highlighting the political nature of these events, some protestors have worn paraphernalia in support of President Trump, who urged the governor to 'give a little' to protestors.

However, warning signs loom internationally. Countries that moved to even partial reopen including Germany, Singapore, and Japan, have resulted in second round spikes of infections requiring further shutdowns. In China, gyms that had been reopened were closed for a second time after renewed spread of cases.

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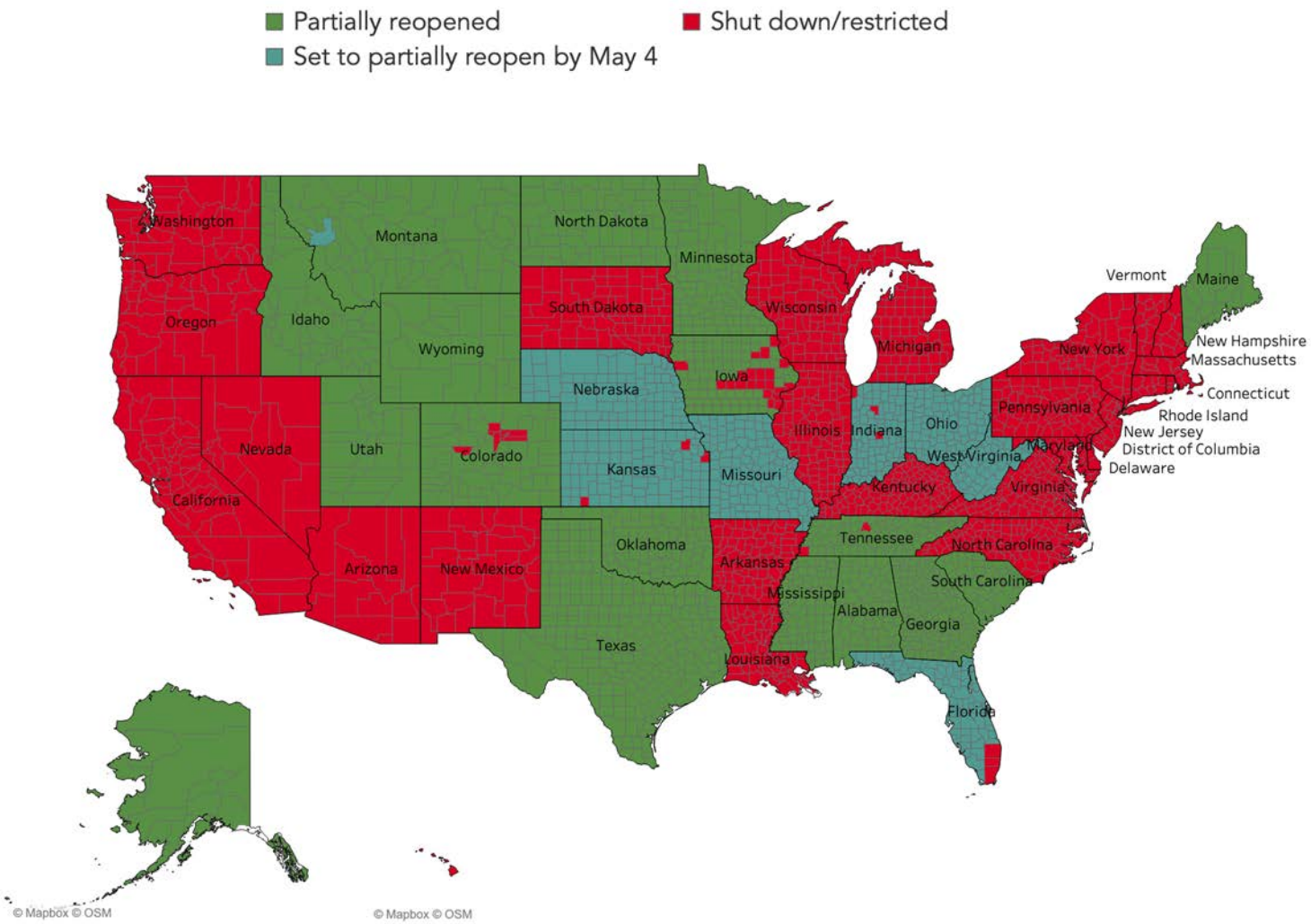
State of the States

Some states and counties have set plans to reopen nonessential businesses as early as May 1…



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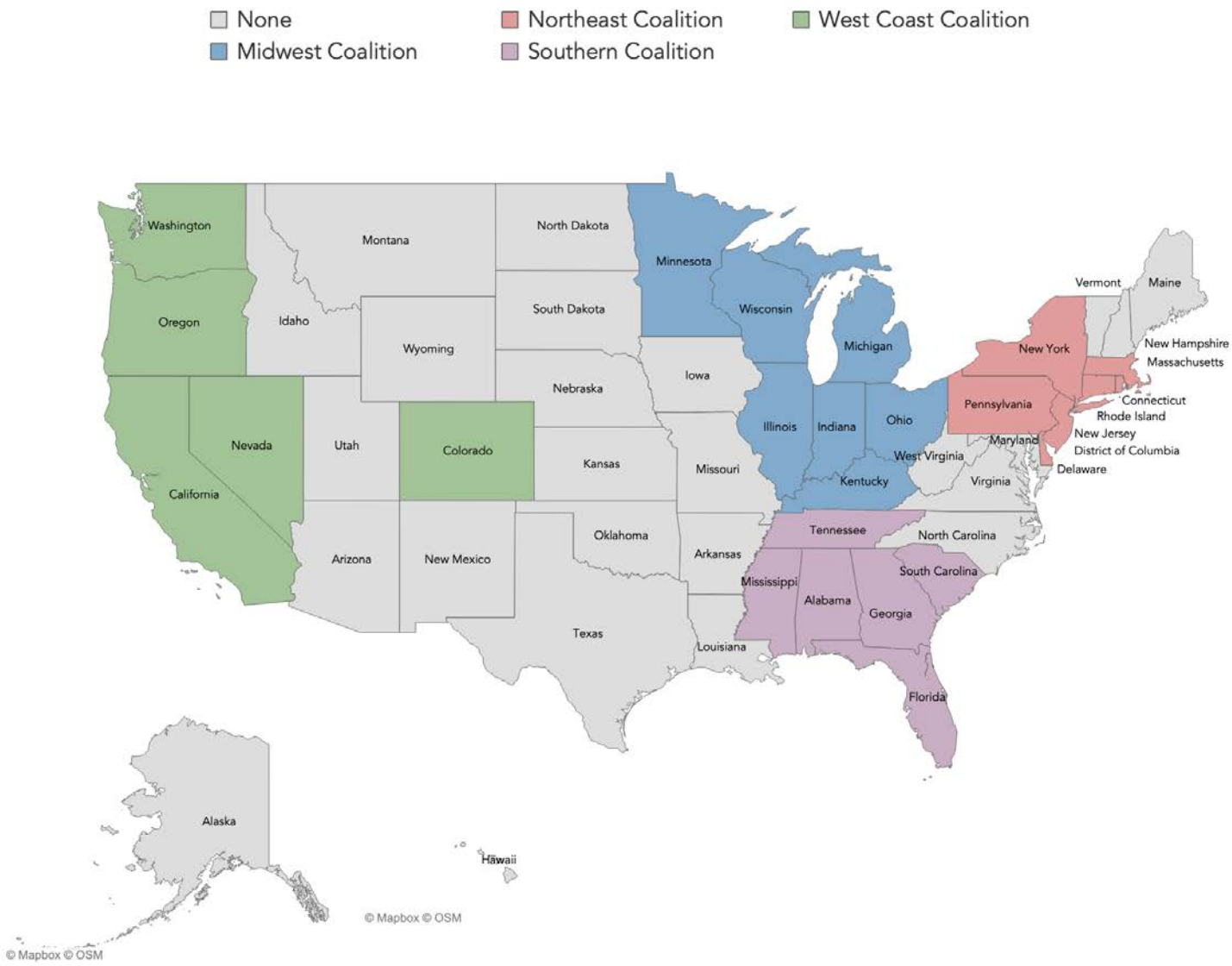
State of the States

…while states continue to form coalitions as governors coordinate a gradual lifting of coronavirus restrictions rather than rely on the federal government.



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Even More Divided Than Pre-Crisis

As nationwide lockdowns enter May, GPG's county-level map shows the path out of crisis is dividing along political lines.

Adding to the red state-blue state divide, there is a growing gap between the experience of urban areas under siege and rural areas chafing from restrictions.

Republican and Democratic voters differ on nearly every aspect of the recovery – from the length of the crisis to the threshold to return to work.

These factors are converging to inflame our tribal tensions, which will only rise over the next 185 days leading up to the election.

The level of difficulty for businesses to communicate across a divided nation will be acute.

Our divided tribal politics are starker and here to stay in 2020.

In larger measures, it will fall to companies to rebuild trust with the public, their customers, and employees.

How they manage this moment will determine their success.

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Private Sector

With reopening policies varying from state to state, companies are planning for themselves how to manage the health risks of reopening against growing economic pains.

Businesses are preparing reopening plans that manage social distancing, enhanced cleaning measures, and regular monitoring of the health of their employees and customers.

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Private Sector

Major businesses are creating their own plans to get their employees back to work. Each focuses on employee health, new technologies, and protocols to maintain social distancing in an environment before widespread therapeutics or a vaccine are available.

On April 21, Wynn Resorts Las Vegas released its reopening strategy and safety precautions. The strategy could serve as a blueprint for other major hotels and meeting facilities. The plan includes:

- Using thermal cameras at entry points;
- Advising guests and employees to physically distance themselves;
- Placing hand sanitizer at entry points and contact areas;
- Providing all employees with COVID-19 training on safety and sanitation protocols;
- Monitoring COVID-19 data every day;
- Allowing no more than four guests per elevator; and
- Increasing the frequency of cleaning and sanitizing public spaces.

Major airlines have moved to require passengers wear face masks on flights. American, United, and Delta announced plans on Thursday for customers to be issued with masks from early May, joining JetBlue and Frontier Airlines. These requirements are in addition to already-announced plans for employees to wear PPE, limiting in-flight meals, more frequent deep cleaning, and empty seats between passengers.

It comes at a challenging time for the industry. On Thursday, April 30, there were 66,600 fewer commercial flights compared to Sunday, March 1, according to flightradar24.

Wall Street is cautioning employees to expect a slow, gradual return with no set date. Many banks are still gathering data and hashing out details before making final decisions. Reports indicate that firms such as Citigroup, Goldman Sachs, and JPMorgan are exploring:

- Redesigning lobbies and elevators;
- Temperature checks on arrival, requiring masks be worn, and providing on-site virus testing; and
- Helping staff commute without public transit.

The National Retail Federation (NRF) unveiled new guidance for safely reopening stores, which prioritizes health and safety, people and personnel, logistics and supply chain, and litigation and liability in three phases:

- Starting with e-commerce, contactless curbside pickup and home delivery;
- Followed by reopening stores to the public with reduced occupancy and social distancing;
- Finally, establishing protection and eventually lifting all restrictions.

Mercedes-Benz reopened a factory in Alabama this week. Employees are gradually returning to work, while being required to wear face masks, submit to temperature checks on entry, and distance themselves in break rooms.

The company has announced the intention for all employees to return to work.

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CASE STUDY:

Ford Motor Company

Ford Motor Co. has worked to combat COVID-19, turning car factories into manufacturing plants of face shields, masks, gowns, and ventilators.

Ford operated with self-developed protocols that show an early model for returning to full production. Workers are spaced apart from each other, separated by plastic barriers and wear protective equipment while at work.

Using Bluetooth technology designed in Austin, a small group of factory workers in Michigan volunteered to wear Samsung smartwatches that vibrate when within six feet of another person.

In a press conference on Thursday, Ford announced the conditions for reopening regular operations:

- Support of government
- Health modeling
- New safety rules
- Staggered resumption
- Employee communication and feedback

These are to be matched with employee health checks, worker PPE, facility modifications, and enhanced cleaning protocols.

> *"It's terrible that a crisis like this has to remind people how important a manufacturing base is … We need to manufacture things to help humanity.*
>
> *Bill Ford Jr.*

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Public Health

Test, track, and cure are the steps public health experts say are needed to return Americans to work. The country will first require widespread, frequent testing of large populations of people.

State governments, companies, and foreign countries are preparing widespread tracing regimes in-person and using new technologies.

Scientists continue to find and scale a vaccine on a timescale faster than ever before seen in medicine.

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Testing

With supply chain shortages limiting the number of tests that can be processed daily and the science around immunity to the novel coronavirus unclear, testing remains a fraught issue. The federal government is launching a "Shark Tank" contest to encourage the rapid development of at-home and point-of-care diagnostic tests.

Serology testing is controversial. Some nations are reportedly weighting the idea of whether issuing "immunity passports" to people who have antibodies against the disease, proven via serology testing.

Serological tests, also known as antibody tests, identify virus particles in a person's blood, revealing the presence of antibodies that a person's immune system has produced as the result of a previous infection with COVID-19.

The World Health Organization and other experts warn this is a dangerous path to travel down, for a range of scientific and ethical reasons:

- It is unknown what level of exposure to the novel coronavirus confers one with immunity, or if immunity will last.
- False positives could put individuals who don't have immunity at risk.
- Immunity passports would divide society between the immune and the non-immune, while potentially leading some individuals to purposely infect themselves in order to gain societal privileges.

PCR tests are the most widespread and accurate diagnostic tests, but supply chain issues have led to delays along every step of the process.

- PCR tests detect the virus' genetic material to confirm an active infection of COVID-19.
- Current plans for reopening society call for a few million to tens of millions of tests per day. So far, the U.S. has conducted ~6 million tests total.
- According to the COVID Tracking project, the highest number of tests the U.S. has completed in a day is just over 314,000.

Others are hanging their hopes on a third type of test – known as an antigen test – now in development.

- Antigen tests detect viral proteins – in this case, it would look for the coronavirus' namesake corona-shaped spikes.
- Ideally, an antigen test, like a pregnancy test, could be rapidly done at home.
- Antigen tests are less sensitive than PCR tests, with a 5 to 10 percent false negative rate.

Meanwhile, the National Institutes of Health (NIH) hopes that healthy competition will speed the development of new testing solutions. The agency is urging scientists and investors to compete for a $500 million prize awarded to those with the most promising approaches to developing a rapid, at-home, and point-of-care diagnostic COVID-19 test.

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Tracking and Tracing

The task of tracing and monitoring contacts of infected patients has been practiced in the U.S. since 1937 to contain the spread of diseases. Now, it is seen as a vital component to eliminating COVID-19 and reopening the U.S. economy, while new digital technology is reviving long-held privacy concerns.

States across the country are deploying their own human contact tracing 'armies.' California plans to deploy 10,000 contact tracers, beginning first with a pilot program in San Francisco using an approach developed by the University of California. In New York, New Jersey, and Connecticut, a tri-state tracing initiative was announced, supported with $10.5 million from Bloomberg Philanthropies and the Bloomberg School of Public Health at Johns Hopkins University.

The first version of the COVID-19 "exposure notification" system by Apple and Google was delivered to public health organizations on April 29, allowing their developers to begin building apps. The companies plan to release the software in two phases: In the first, using the technology will require users to download apps developed by health agencies; in the second, the system will be integrated into operating systems, eliminating the need for an app. According to Axios, the voluntary technology will use Bluetooth to "send out a random and frequently changing key to identify itself. If someone later reports they tested positive, their phone broadcasts out the keys it connected with, allowing those other users to be notified."

Abroad, some contact tracing apps and technologies have been successively adopted by large swaths of country populations while others have seen less engagement. In less than 72 hours since it was released, more than 2 million people downloaded the Australian government-backed tracing app, COVIDSafe, accounting for roughly 8 percent of the country's population. India's app, Aarogya Setu, has been "downloaded more than 75 million times across the nation of 1.3 billion people."

In contrast, downloads of Singapore's Bluetooth-based TraceTogether app have plateaued at less than 20 percent of the country's population more than a month after its launch, despite lawmakers urging residents to download it to help save lives.

Across China, residents have been assigned QR codes, which they are asked to scan when in public spaces. As a result, movement is easily tracked – once a positive COVID-19 case is confirmed, authorities backtrack the patient's movements and determine who has been in contact with them.

In the U.S., privacy worries are forefront when weighing widespread use of digital tracing technology. The two decades since the Patriot Act was introduced have been littered with online privacy breaches, from WikiLeaks to location sharing services and the Cambridge Analytica scandal. The trade-off between security and personal privacy is again being weighed.

This has left Americans wary. Our research program conducted this month found both Republicans and Democrats reflecting longstanding fears about data breaches. Americans are anxious about data security, civil liberties, and government surveillance, even with safeguards in place.

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Vaccine

The global medical community is racing at breakneck speed to develop a vaccine against the novel coronavirus, with more than 90 efforts underway at companies and universities worldwide. Historically, the time it takes to develop, test, and approve a new vaccine has been six to eight years. The record for developing a new vaccine is more than four years. By fast-tracking the testing and approval process, medical experts say a vaccine can be ready as early as 12 to 18 months from now.

The government is launching a "Manhattan-project style effort" to accelerate the process. On April 29, Bloomberg News reported that the Trump administration is organizing "Operation Warp Speed," which aims to pool the resources of private industry, the military, and government agencies to develop a new vaccine and manufacture enough doses for most Americans by January 2021.

The challenge is immense, with experts highlighting the challenges of the road ahead.

- It is not yet known whether vaccines will confer long-term immunity (like an MMR shot) or seasonal immunity (like the flu shot);
- Manufacturing capacity will need to be increased to create the supply;
- Fast-tracked drug approvals through a shorter clinical trial process comes with a set of safety risks.

Researchers worldwide are testing a variety of technologies they believe might provide immunity to COVID-19. All vaccines would expose the body to an altered, safe version of the virus that would not cause the disease but would instead cause an immune response that could fight the virus if a person were infected.

- At least six groups have already begun human trials, according to the World Health Organization.
- Scientists at the Jenner Institute in Oxford, England, have announced early success in developing their new coronavirus vaccine, launching their first human trial last week. The group has joined forces with AstraZeneca to manufacture the resulting vaccine, if the experimental vaccine is proven to work. Should all go well in trials, the group told the New York Times, they could have several million doses produced and approved by this September.
- Developing, manufacturing, and distributing a future vaccine is the focus of the World Health Organization and the global ACT initiative.

Dr. Anthony Fauci told the Today Show that having a coronavirus vaccine by January 2021 is not out of the question: "We want to go quickly, but we want to make sure it's safe and it's effective," Fauci said. "I think that is doable if things fall in the right place."

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