

Horizon Media National Social Isolation Barometer Week of April 20, 2020

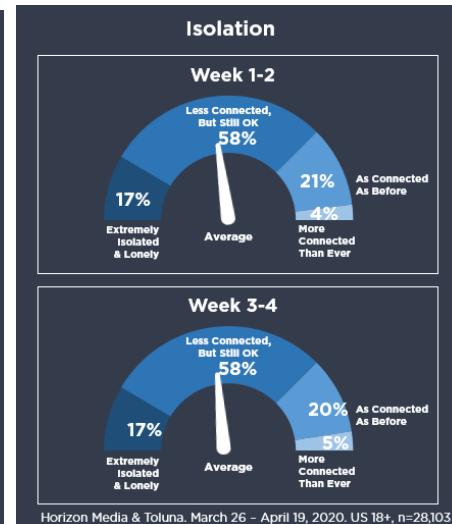
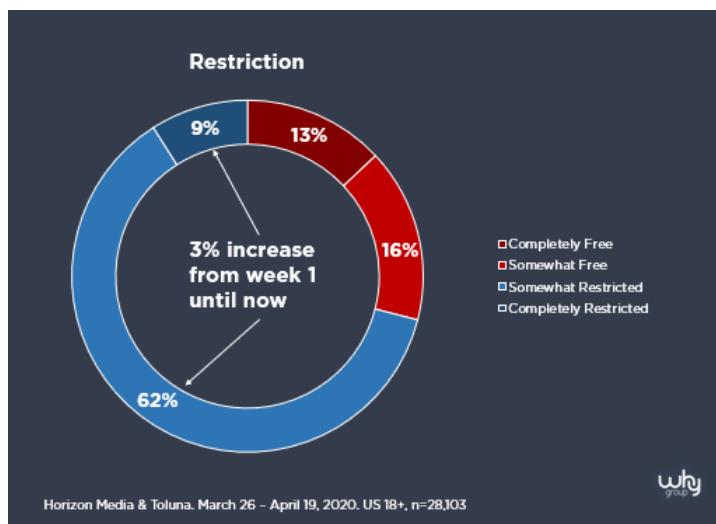
Horizon Media's National Social Isolation Barometer began on March 26, 2020. It is designed to measure the feelings of isolation among Americans during the stay-at-home orders to help stop the spread of COVID-19. Each day 1,000 people are interviewed; to date over 25,000 interviews have been completed. In week 4 of our analysis, Americans continue to feel more constrained, but levels of isolation seem to be stabilizing. We also take a deep dive into the impact of politics and regions on feelings of social isolation.

Headlines

- **Americans feeling more restricted due to shifts in group sentiment, but the rise in feelings of isolation seem to have slowed as people adjust to the new normal**
- **Feelings of freedom are directly affected by political alignment and geographic location, and political messaging can rapidly and pointedly affect large scale change in feelings of restriction**

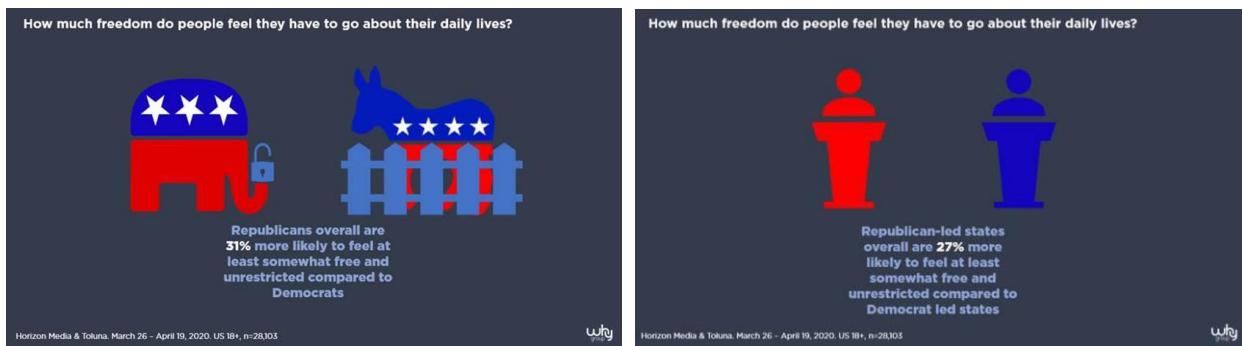
Feelings of Restriction Continue to Build, But Feelings of Isolation Seem to Have Plateaued

As the days wear on and political groups begin to protest the shutdown, feelings of restriction seem to be creeping upward (3%) week over week. However, people seem to be adjusting to the new normal as feelings of social isolation have slowed their week over week climb and begun to flatten.



Political Messaging Is Affecting People's Sense of Freedom

Individuals who identify as Democrats, and those who live in states with Democratic leadership, feel more restricted than their Republican counterparts. This likely has to do with a multitude of factors, such as Democratic states having high levels of business restrictions, Democratic leadership having more messaging, and the fact that Democrats are more likely to be in highly concentrated cities where individuals are more vulnerable to the virus. There has also been a large quantity of Republican messaging questioning the harm and danger of the virus, and Republican-led states are more likely to have looser restrictions on social distancing and essential businesses.



Perceptions of Freedom Shift Based on Political Leanings

Despite that fact, throughout the course of the past month, we're starting to see a shift as political parties firmly entrench themselves in polarized opinions around whether or not to reopen the country and people begin to align with those narratives.

Over the past week we've seen a reversal in the Republican / Democrat divide when it comes to feelings of freedom vs. restriction. Amid increasing frustrations, protests against state lockdowns, and calls from the President and other political leaders to reopen the country, Republicans are overall more likely to feel completely restricted (24% increase over the past week). Interestingly, after the early, more stringent lockdowns in Democratic states drove feelings of restrictions among Democrats (up 30%) vs. Republicans (down 15%), as of this week we see Democrats actually trending in the opposite direction and report feeling slightly more freedom during the same period.

The timing of this shift raises an interesting causal consideration. Is this change being driven by an exasperated and anxious populous committed to classic American ideals of independence and freedom? Is it driven by disproportionate and sensationalized media coverage? Is it driven by political agendas and politically affiliated organizations? The answer is likely a combination of all these factors interacting to create a change in perception.

The Political Divide in Feelings of Freedom vs. Restriction

*People reporting feeling "Completely Restricted"
% change over prior week*



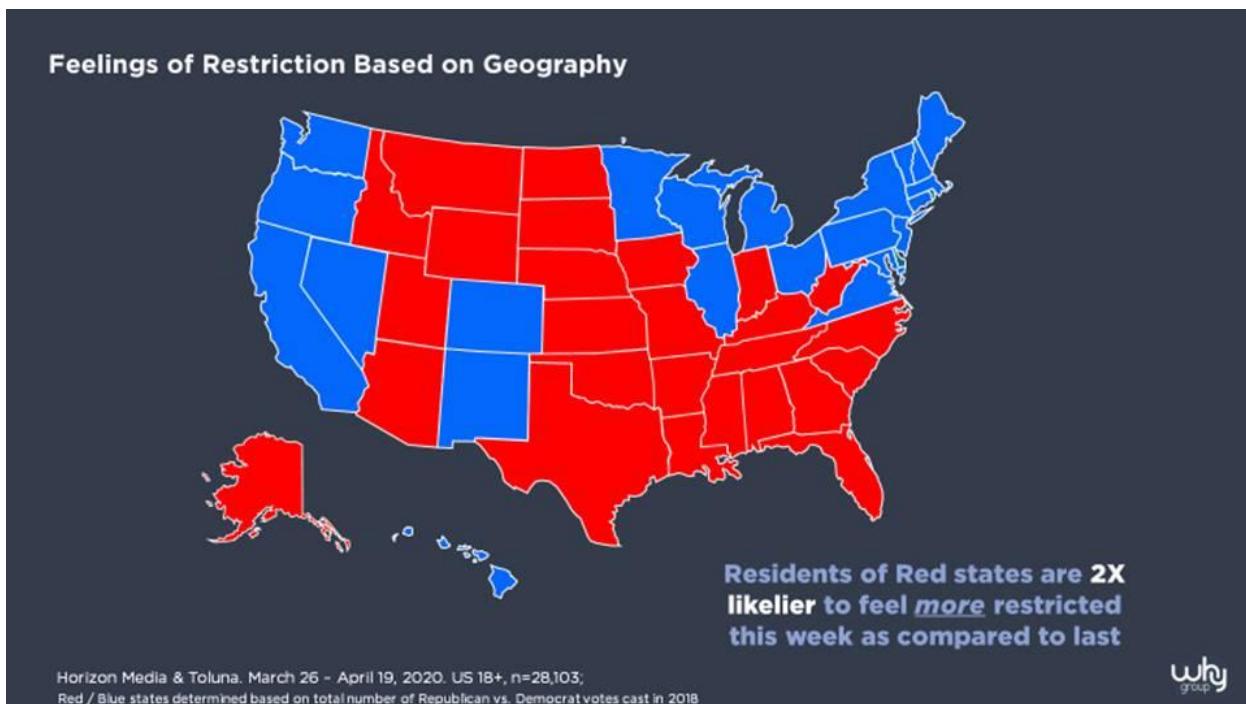
Over the past week Republicans showed a 24% swing toward feeling completely restricted, vs Democrats who actually showed a 5% shift to feeling less restricted

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why
group

Looking at it from a geographic perspective, we see a comparable trend between Red and Blue states. Similar to political affiliation, over the past week we've seen respondents from Red states report feeling more restricted in their ability to lead a normal life (2X more likely) and conversely residents of Blue states report slightly more freedom in their daily life.

This geographic-specific change stands to reason. As calls to reopen become increasingly partisan, the natural outcome would be that those areas that share common partisan affiliations would begin to react in alignment with that belief. In fact, even as calls to reopen begin to specifically and directly target even traditionally Blue areas, we begin to see similar increases in feelings of restriction.



Calls to Liberate Lead to Greater Perception of Restriction

Last week, amid protests to reopen the economy, we saw particular emphasis on organizing change in the Democratically led states of Michigan, Minnesota, and Virginia. These movements were championed both by activists and political leaders - including President Trump who took to Twitter to call on the residents of the Michigan, Minnesota, and Virginia to “liberate” their states.

Prior to these statements and the events of last week, Michigan, Minnesota, and Virginia were in line with other Blue states regarding perceptions of their level of personal freedom vs. restriction. Following the tweets there was a noticeable departure. While Blue states overall indicated increasing perceptions of freedom, over the same period the three “Liberate” states show a sudden increase in feelings of restriction. The suddenness of the change illustrates how quickly perceptions can evolve when tapping into an emotion as fundamental as American’s feeling of freedom.

How perceptions in Michigan, Minnesota, and Virginia shifted this past week



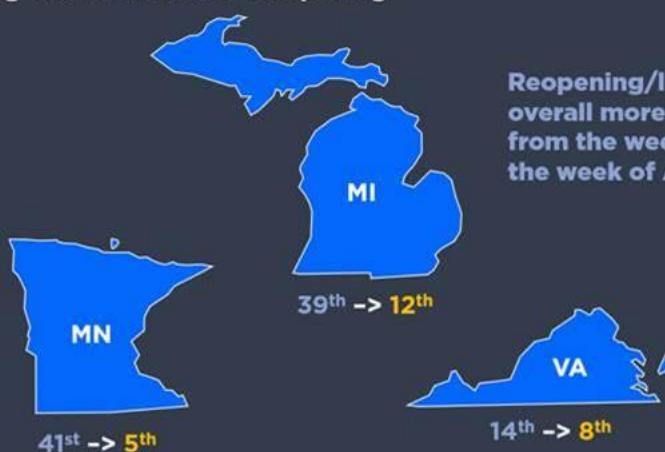
"Liberate" states are 23% likelier to feel more restricted in this week vs. all other states, and 75% likelier vs. other blue states

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The changes in perception are also reflected in changes in social conversation in those states. In all three states, the conversation about "reopening" jumped significantly. These changes reflect the influence that social media can have in driving the momentum for "reopening" even in states where there was limited "reopening" sentiment prior to the liberate tweets. We will continue to monitor changes in sentiment as more states, particularly in the south, move toward implementing "reopening" plans.

States Talking The Most About "Reopening"



State Rank in Conversation the Week of the 6 th
State Rank in Conversation the Week of the 13 th

Horizon Media Distillery

