aytm

COVID-19 Pandemic Impact on US Consumers

W11 | May 28-29, 2020

STUDY OVERVIEW

Objectives

To understand the changing US consumer landscape during the COVID-19 global pandemic, aytm is conducting a weekly tracker focused on Americans' attitudes and perceptions of the virus, its impact on their daily life, changes in purchase and consumption behavior, and consumers' outlook on the future.

Methodology

A 7-minute online survey was conducted among N=1000 US adults aware of COVID-19 sampled and weighted to be reflective of the US population.*

This eleventh wave of aytm's COVID-19 Consumer Tracker fielded Thursday, May 28 – Friday, May 29, 2020 using aytm's survey platform and proprietary panel PaidViewpoint.

**Data was weighted on four key demographics – Age by Gender; Annual Household Income; and, four main US Regions.*

Reported sample sizes are unweighted sample sizes unless otherwise noted.

All significance testing is conducted at 95% confidence level with the effective base used as the sample base for statistical calculations (Effective Base = 953 for Total sample).

***Green** and **red** text highlighting indicates statistically significant difference over at least one other subgroup.*

▲▼ Arrows indicates statistically significant change from data point in prior wave, unless noted otherwise.

Chart labels for 4% or less may be omitted for readability.

COVID-19 KEY DATES

DEC 31, 2019
Dozens of cases of unknown cause reported in China

JAN 11, 2020
China reports first death

JAN 21, 2020
USA reports first case

JAN 30, 2020
WHO declares global health emergency

FEB 29, 2020
US reports first death, travel restrictions

MAR 13, 2020
President Trump declares national emergency

MAR 15, 2020
CDC recommends no gatherings of 50+ people

MAR 24, 2020
IOC Delays Summer Olympics

MAR 26, 2020
US Senate Approves Stimulus Package

MAR 30, 2020
More states issue stay-at-home directives

APR 3, 2020
CDC urges to wear a mask outside of home

April 13, 2020
Some European countries begin easing restrictions

April 21, 2020
Earlier-known US COVID deaths discovered

May 1, 2020
WHO extends declaration of global health emergency

May 13, 2020
Top WHO official says coronavirus 'may never go away.'

May 21, 2020
Reported coronavirus cases top 5 million worldwide.

May 27, 2020
Coronavirus deaths in the US surpass 100K

1 2 3 4 5 6 7 8 9 10 11

J20 F20 M20 A20 M20 J20 J20 A20 S20 O20 N20 D20

Select non-research dates sourced from https://www.nytimes.com/article/coronavirus-timeline.html

COVID-19 KEY FINDINGS

Americans remain gripped by health and economic fears.

- Concern over the COVID-19 pandemic continues to fall very gradually this week – an ongoing trend since the beginning of April. Levels are at their lowest point since the tracker's beginning. However, more than half of Americans are still extremely or very concerned about the outbreak.
    - Americans' perception of the severity of the outbreak is largely unchanged – most believe the situation is at least as serious as is being represented – but the proportion of those who feel that the pandemic is not as serious has been steadily rising the end of April, and is now near 20 percent.
- Much of the concern related to COVID-19 centers around the health of older relatives, as has been the case for months. Also unchanged is the propensity for individuals to exhibit a lower degree of concern for their own personal health.
- Compounding health concerns are fears that the pandemic is imperiling the economic future of individuals, families, communities, and the nation as a whole. For several consecutive weeks, concern for the US economy is nearly as high as it is for public health.
    - The majority of Americans continue to show some degree of optimism when it comes to their personal financial futures – most believe they will be the same or better off financially one year from now.

COVID-19 impacts persist, and affect every aspect of daily life.

- About one-quarter of Americans report that the COVID-19 pandemic has had a severe impact on their daily lives to date, and another 52 percent say that they've experienced a moderate impact. Many of these reports stem from the ongoing burden of job losses and reductions in pay.
    - Job losses are steady at about 10 percent. Twenty-one percent have experienced a reduction in salary or hourly wages, with very few seeing a return to pre-COVID levels despite nascent reopening efforts.
- Consistent with several previous weeks, about seven in ten Americans report reducing their discretionary spending this week in order to meet the unique financial challenge brought on by the pandemic.
    - Outings that disregard social distancing, like dining out and retail shopping, are being cut. Non-essential product categories also remain at risk.
    - Certain categories are seeing sustained elevated levels of shopping activity – namely, cleaning products, shelf-stable foods, and frozen foods.
    - Product shortages are a constant annoyance. Sixty-three percent of those who are switching brands of cleaning products are doing so as a result of their preferred product being sold out.

Optimism remains as some activities resume.

Forty-seven percent of Americans remain optimistic and expect that the COVID-19 pandemic will improve in their local area within the next 30 days, and just one-quarter expect the situation to worsen. Americans still believe it will take an average of 11 months until things are back to normal. Still, more feel it is the right time to begin reopening (with public health as a priority) and are starting to resume certain activities such as shopping in stores, gathering with others, visiting hair salons, and using public transportation.

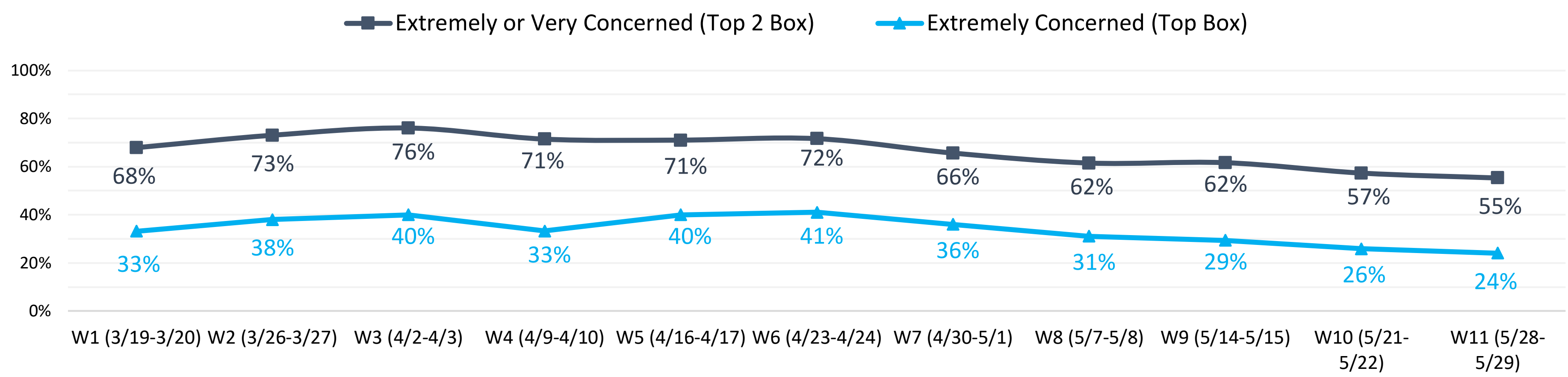
Wave over Wave Trends

- COVID-19 Awareness, Concern
- Perceived Severity
- Anticipated Change in Next 30 Days
- Employment and Financial Impact
- Estimated “Back to Normal” Timeline

Coronavirus/COVID-19 Concern Level, Perceived Severity

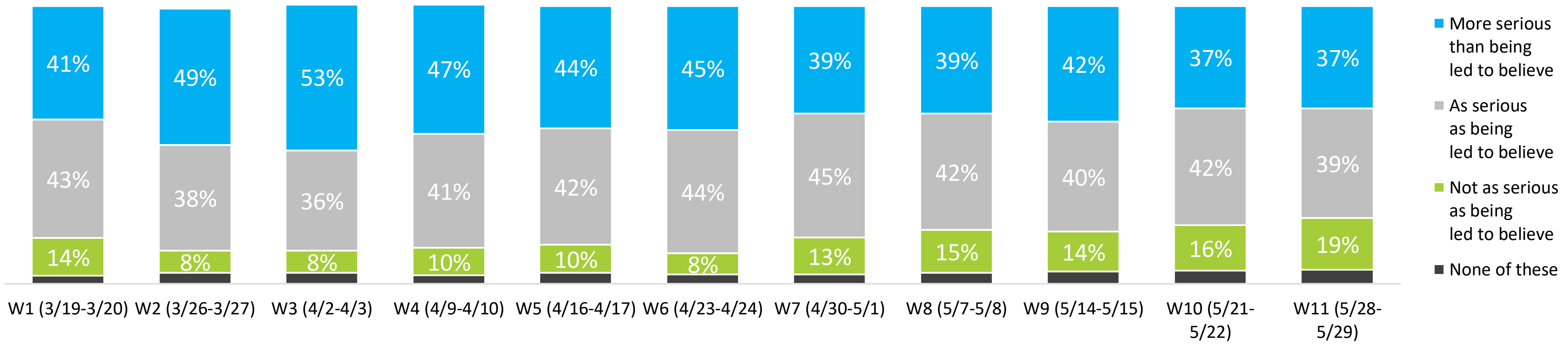
COVID-19 concern levels continue to gradually ease, a trend that began near the end of April, at both the top box and top two box levels.

Coronavirus/COVID-19 Concern Level



In terms of perceived severity, Americans remain primarily split on whether the pandemic is *as* serious as is being represented, or *more* serious.

Coronavirus/COVID-19 Perceived Severity

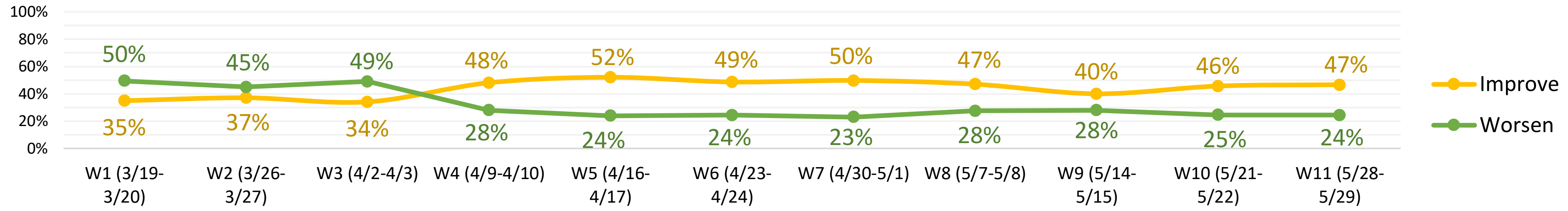


Q6 - Within the past month, have you heard (either through word-of-mouth, media, or some other source) any news, updates, or other information regarding the spread of the novel Coronavirus or COVID-19 in the US?
Q7 - Overall, how would you characterize your current level of concern about the Coronavirus/COVID-19 situation? Base: COVID-19 Aware
Q10 – Which statement below best describes your general perception of the Coronavirus/COVID-19 pandemic? Base: COVID-19 Aware

Anticipated Change in Coronavirus/COVID-19 Situation

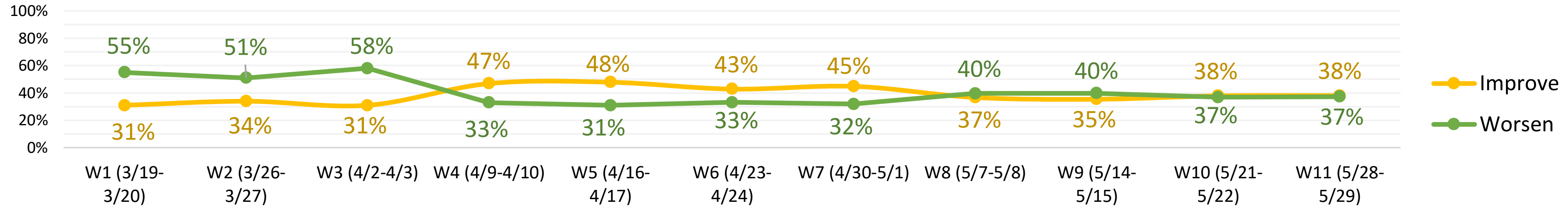
Nearly half of Americans remain optimistic this week about how the pandemic will unfold over the next 30 days at the **local** level. About one-quarter still expect the situation to worsen.

Change Locally in Next 30 Days



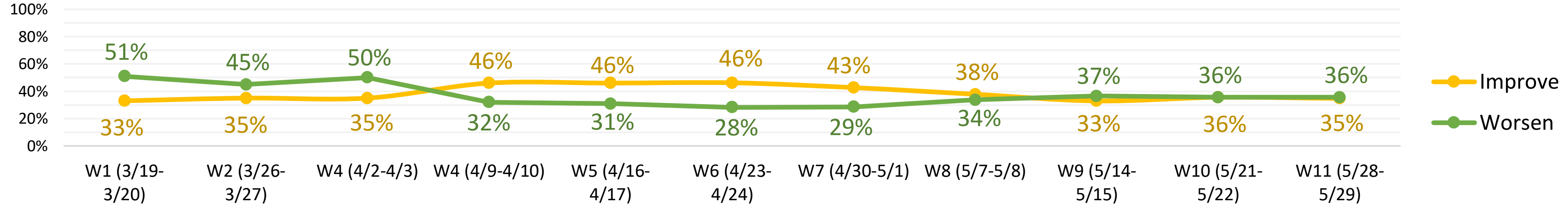
The **national** outlook continues to be somewhat less optimistic, with just 38% expecting improvements.

Change in US Overall in Next 30 Days



Americans have similar expectations for how the pandemic will unfold **globally:** about one-third expect the situation to improve and another third expect it to worsen.

Change Globally in Next 30 Days

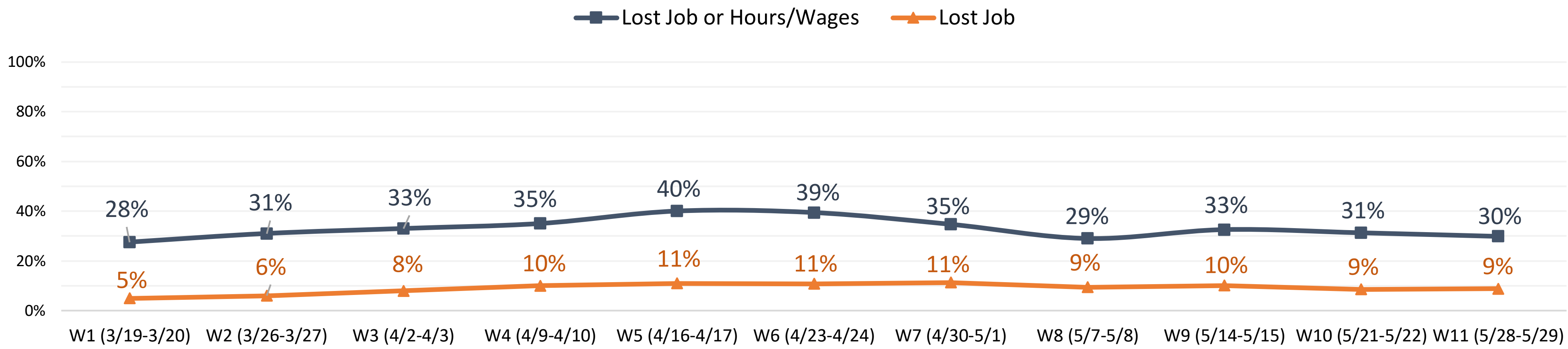


Q22 - Thinking locally, about the US overall, and globally, how do you expect the Coronavirus/COVID-19 situation to change in the next 30 days? Base: COVID-19 Aware

Employment, Financial Impact of Coronavirus/COVID-19

There is no significant change this week in employment impacts as a result of the outbreak, but levels remain elevated with one in ten reporting a lost job.

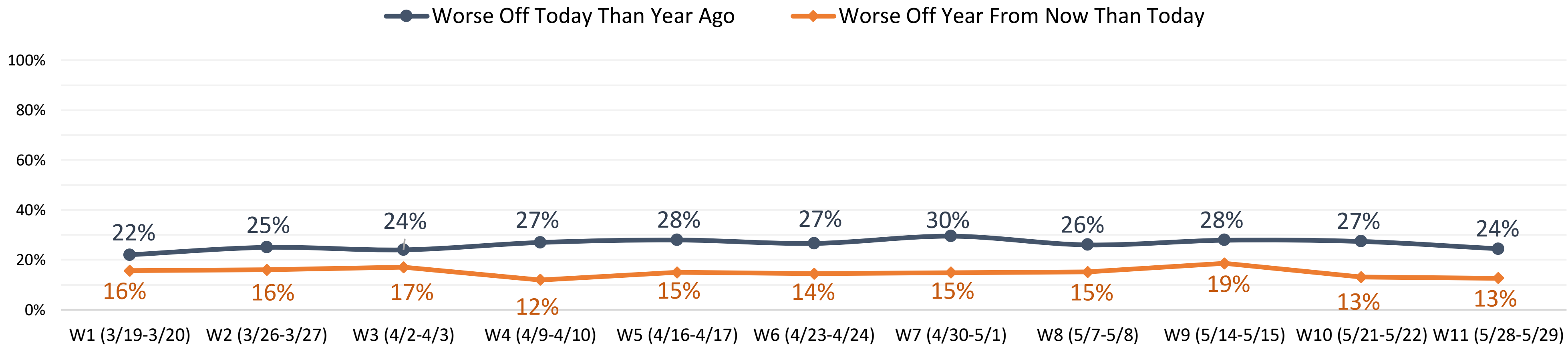
Coronavirus/COVID-19 Impact on Employment



For W8, this question text was revised slightly to focus on employment effects incurred **at any point during the crisis.*

Likewise, Americans' anticipated financial state also remains largely unchanged with just 13 percent expecting to be worse off financially one year from now.

Personal Financial State vs. One Year Ago, From Now

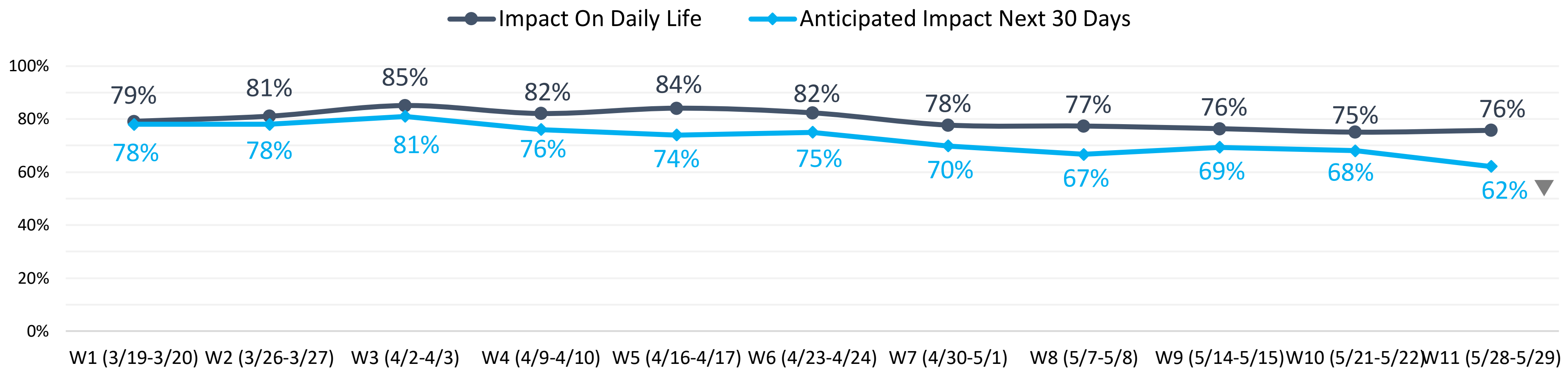


Q19 - At any point, did you lose a job or were your job hours or salary negatively affected by the Coronavirus/COVID-19 situation? Base: COVID-19 Aware | Q2 - Would you say that you/your family are better or worse off financially than you were a year ago? / Q3 - Now looking to the future: Do you think one year from now you/your family will be better or worse off than you are today? Base: COVID-19 Aware

Impact, Estimated Timeline of Coronavirus/COVID-19

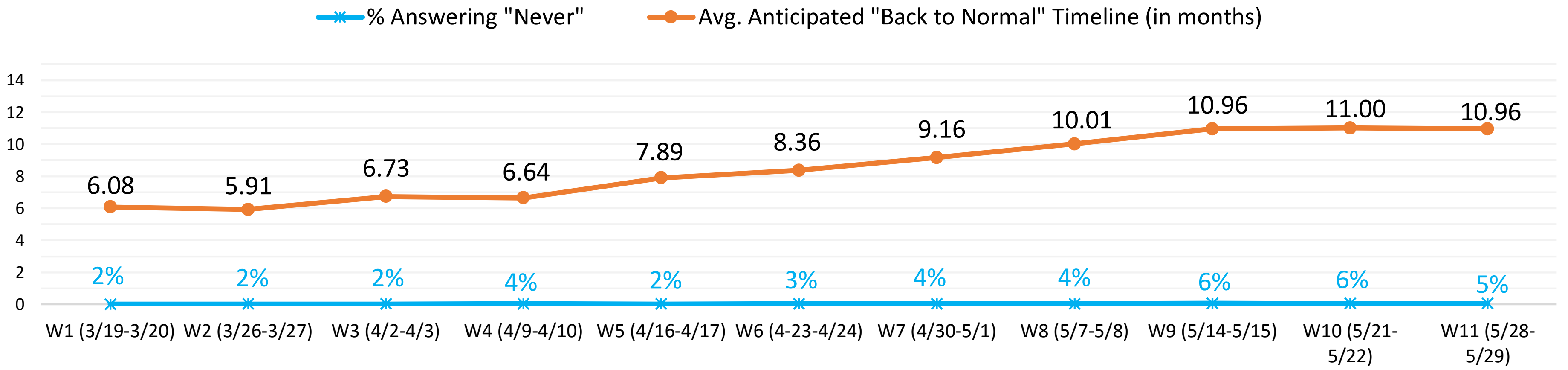
Three-quarters of Americans report severe or moderate impacts on their daily lives to date from the outbreak. This week, fewer Americans expect severe or moderate impacts from the pandemic over the next 30 days.

Severe or Moderate Impact on Daily Life due to Coronavirus/COVID-19



The average anticipated time until things are "back to normal" remains flat at 11 months for the third consecutive week.

Anticipated "Back to Normal" Timeline



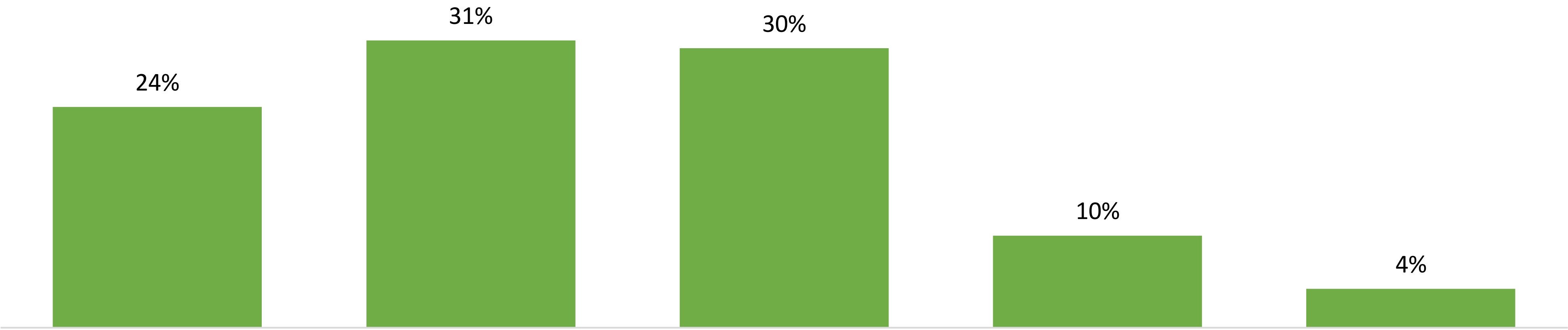
Q11 - Overall, how much of an impact would you say the Coronavirus/COVID-19 situation has had on your daily life? Base: COVID-19 Aware
Q23 - Now fast forwarding 30 days, how much of an impact do you think the Coronavirus/COVID-19 situation will be having on your daily life at that time? Base: COVID-19 Aware
Q24 - What is your best guess about how long, if at all, it will take before your life is "Back to Normal" after Coronavirus/COVID-19? Base: COVID-19 Aware

Awareness, Perceptions, Concerns

- COVID-19 Awareness, Concern
- Health Concerns
- Economic Concerns
- Perceived Severity

Fifty-five percent of Americans remain very or extremely concerned about the pandemic. As has been the trend for several weeks, younger generations (18-44) are somewhat less concerned than those 45 and over.

Coronavirus/COVID-19 Concern Level

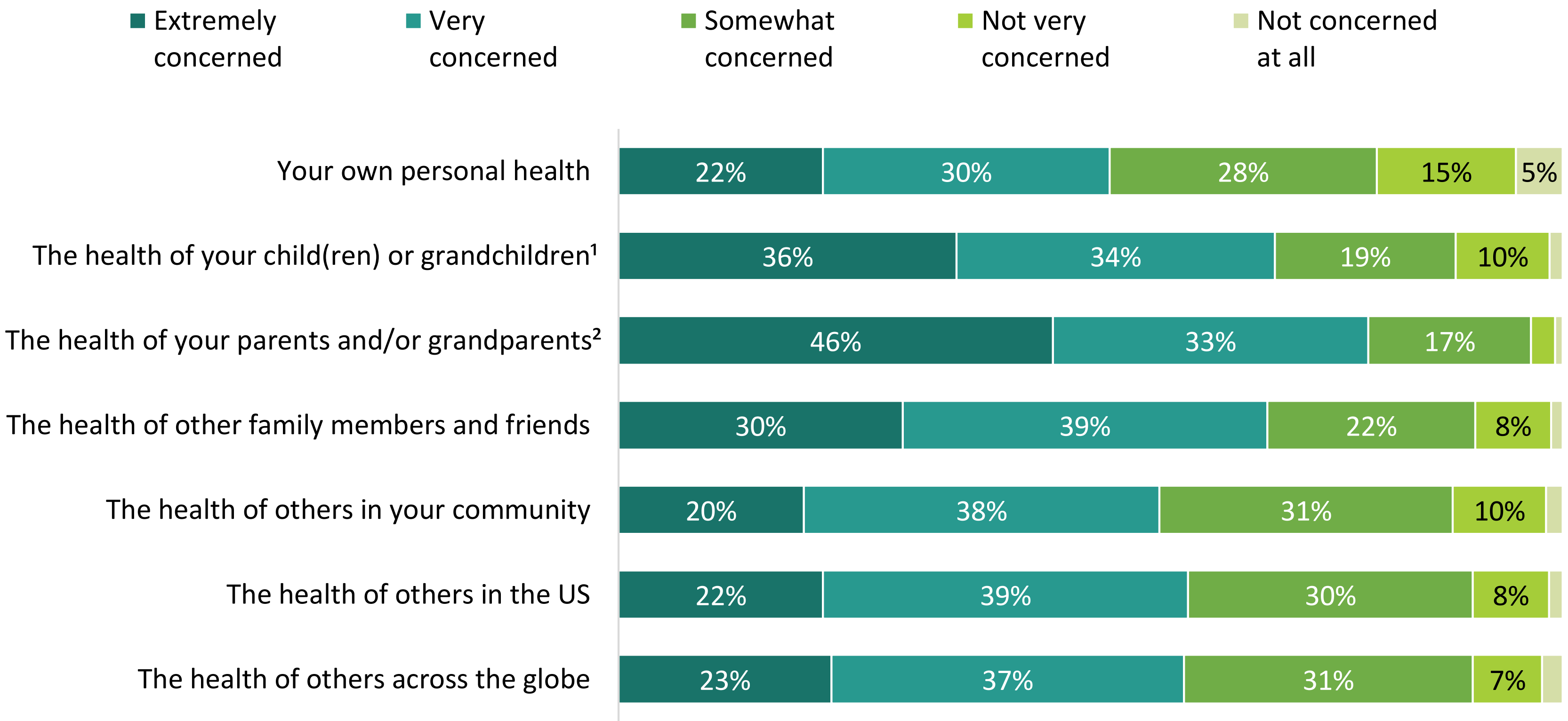


	Extremely concerned	Very concerned	Somewhat concerned	Not very concerned	Not concerned at all	T2B
Under 30	**18%**	33%	**37%**	8%	4%	**51%**
30 to 44	**21%**	30%	**34%**	12%	3%	**51%**
45 to 59	**26%**	28%	**28%**	11%	6%	**55%**
60 and older	**29%**	34%	**24%**	9%	3%	**63%**

Q6 - Within the past month, have you heard (either through word-of-mouth, media, or some other source) any news, updates, or other information regarding the spread of the novel Coronavirus or COVID-19 in the US?
Q7 - Overall, how would you characterize your current level of concern about the Coronavirus/COVID-19 situation? Base: COVID-19 Aware

Concern for the health of older relatives remains particular high this week, and Americans are still somewhat less concerned for their own personal health. The 60+ generation is generally more concerned about broader communities than younger generations.

Coronavirus/COVID-19 Health Concerns



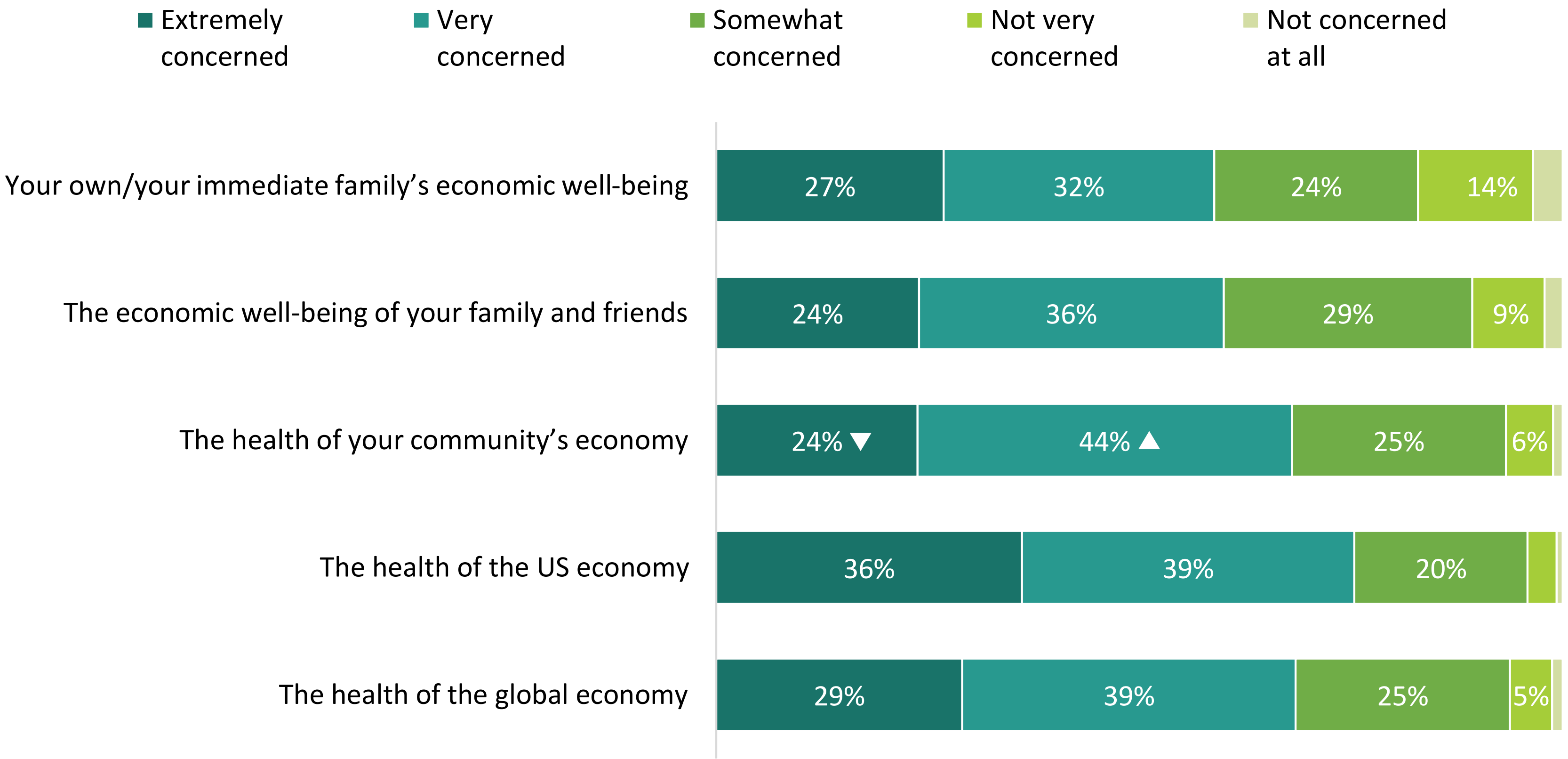
T2B (Extremely/Very Concerned)

	Total	Under 30	30 to 44	45 to 59	60 and older
Your own personal health	52%	44%	48%	52%	62%
The health of your child(ren) or grandchildren[1]	70%	82%	72%	67%	67%
The health of your parents and/or grandparents[2]	79%	85%	79%	75%	79%
The health of other family members and friends	69%	69%	69%	67%	70%
The health of others in your community	57%	49%	57%	58%	64%
The health of others in the US	60%	53%	58%	59%	69%
The health of others across the globe	60%	55%	58%	59%	66%

Q8 - To what extent are you concerned about the potential health impact of Coronavirus/COVID-19 at the following levels? Base: COVID-19 Aware + Not Very – Extremely Concerned
[1]Only shown to those with children or grandchildren; [2]Only shown to those with living parents or grandparents

Nearly four out of five Americans are very or extremely concerned for the health of the US economy, which exceeds other areas of economic concern including concern for one's own economic wellbeing and that of immediate family. Interestingly, personal economic concerns are highest among Americans under 30 and age 45-59.

Coronavirus/COVID-19 Economics Concerns



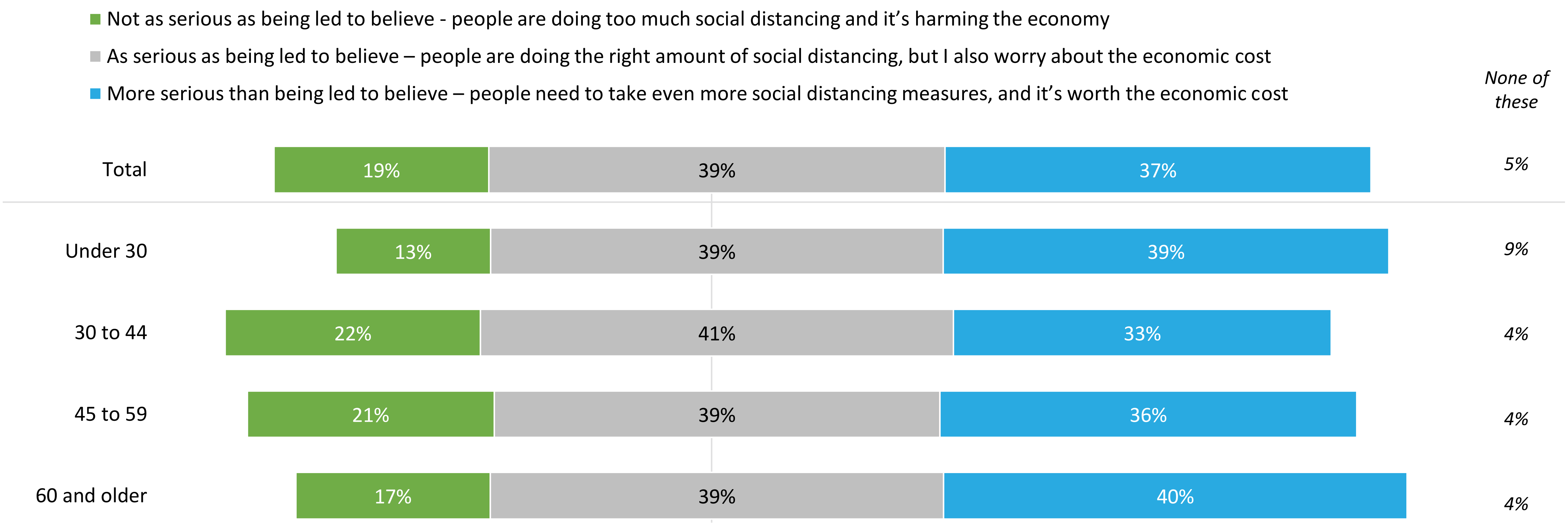
T2B (Extremely/Very Concerned)

	Total	Under 30	30 to 44	45 to 59	60 and older
Your own/your immediate family's economic well-being	59%	63%	56%	63%	54%
The economic well-being of your family and friends	60%	61%	58%	61%	60%
The health of your community's economy	68%	60%	68%	71%	72%
The health of the US economy	75%	64%	76%	78%	81%
The health of the global economy	68%	60%	66%	69%	77%

Q9 - To what extent are you concerned about the potential economic impact of Coronavirus/COVID-19 at the following levels? Base: COVID-19 Aware + Not Very – Extremely Concerned

As in previous weeks, most Americans believe that the current levels of concern are justified, or that the situation is even more serious than is being represented.

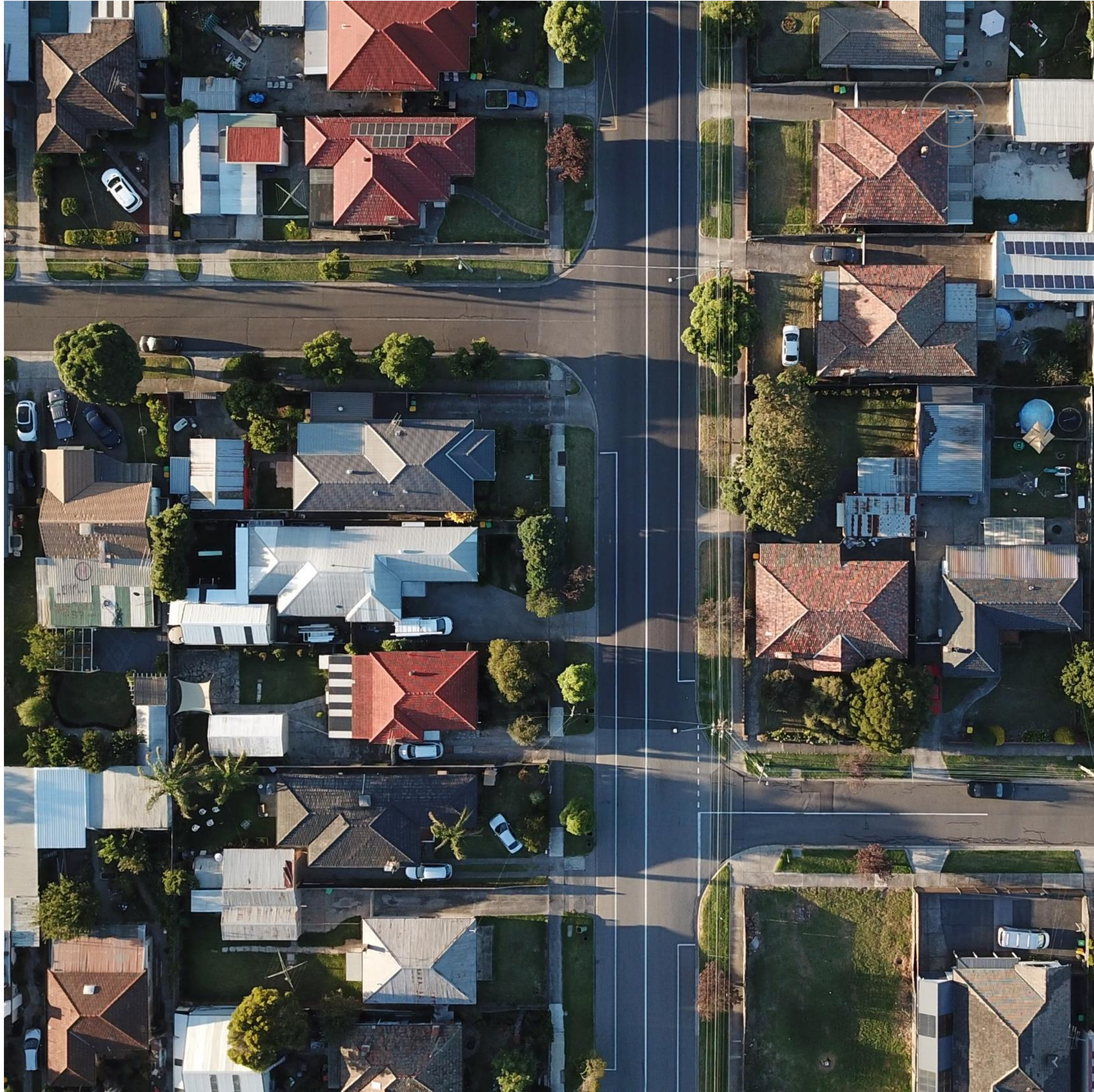
Coronavirus/COVID-19 Perceived Severity



Q10 - Which statement below best describes your own general perception of the Coronavirus/COVID-19 pandemic? Base: COVID-19 Aware

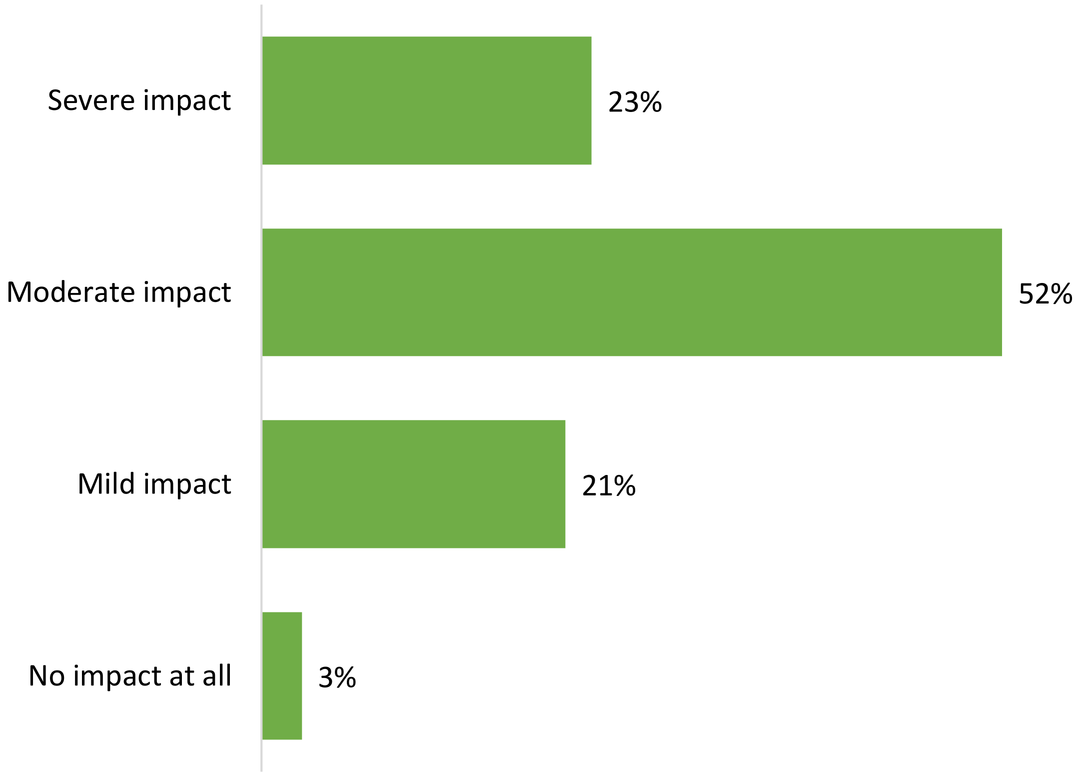
Impact on Daily Life

- Overall Impact
- Behavioral Reactions



Nearly four out of five Americans continue to report severe or moderate impacts on their daily lives. Impacts are reported at higher rates in the Northeast and West regions, and among the 30-44 age group.

Coronavirus/COVID-19 Impact on Daily Life



	Under 30	30 to 44	45 to 59	60 or older
Severe	24%	**27%**	**25%**	**17%**
Severe or Moderate	79%	**82%**	**71%**	**72%**

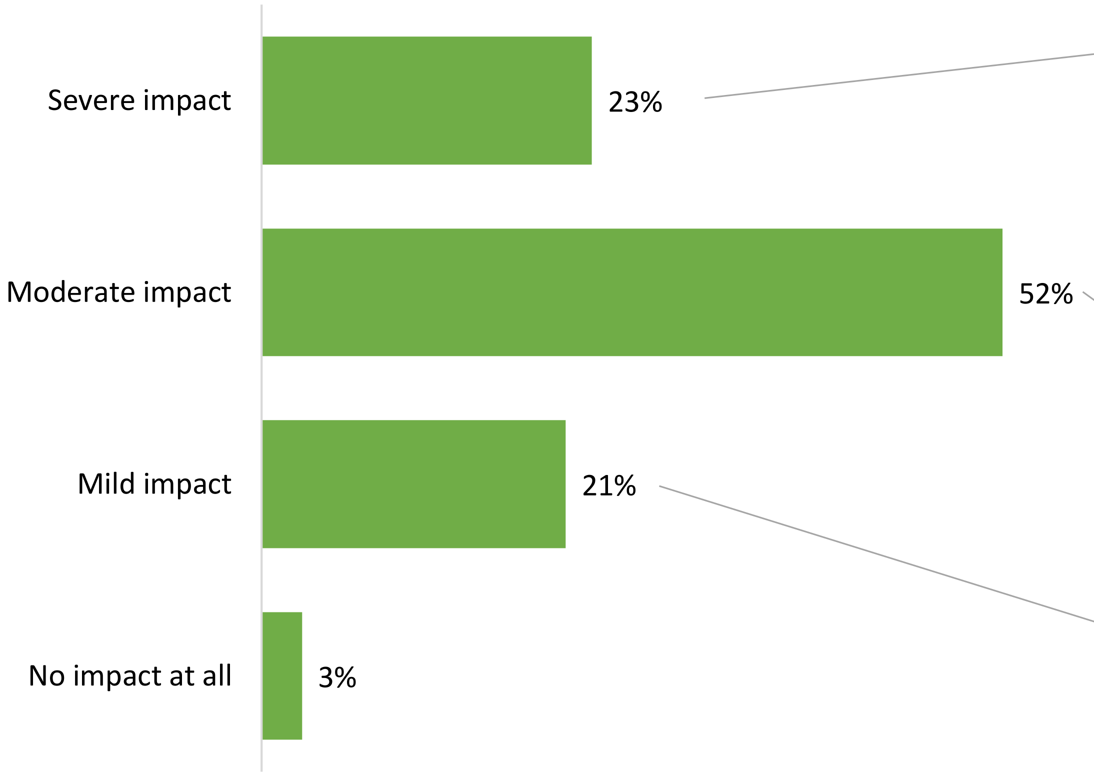
	Under $50K	$50K to $100K	$100K or more
Severe	23%	24%	23%
Severe or Moderate	**73%**	75%	**81%**

	Northeast	Midwest	South	West
Severe	**28%**	22%	**18%**	**28%**
Severe or Moderate	80%	76%	73%	76%

Q11 - Overall, how much of an impact would you say the Coronavirus/COVID-19 situation has had on your daily life? Base: COVID-19 Aware

The financial burden brought on by job loss and reduced pay contribute most significantly to the stresses mentioned by Americans who say the pandemic has had a severe impact on their daily lives. Juggling new obligations like homeschooling and acquiring basic needs are also stressors.

Coronavirus/COVID-19 Impact on Daily Life



"I have been afraid to go to work."

"Lost my job, can't just go and do normal things. Can't go to friends houses and go in and share a cup of coffee and sit and talk."

"Being laid off work until at least September."

"I cannot travel which means I cannot work. Financially it's been difficult. Socially I feel trapped."

"Now homeschooling two children, working from home with no return date, used to grocery shop every Thursday, now I try to stretch it as long as possible, rarely leave the house."

"Working from home."

"Have to home school as well as a lost job.."

"Getting supplies and groceries we need mostly. We haven't had to do without but, there are certain things like Toilet paper, disinfecting wipes, hand soaps, meat and frozen fruits and vegetables that are hard to get. Having to make a meal plan and plan b meal plan when ordering groceries for delivery."

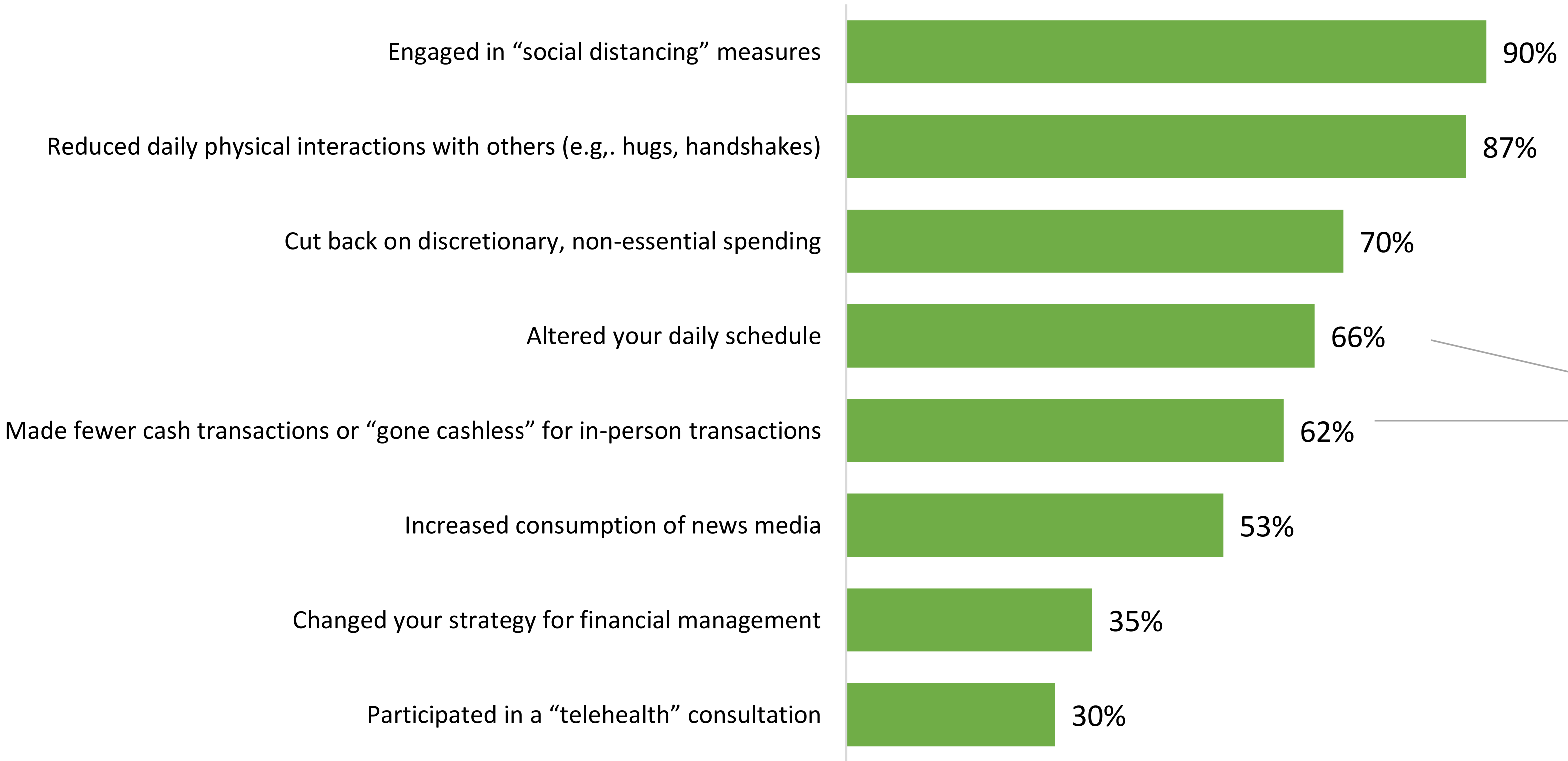
"Not living the way we were before....going places, seeing people, shopping in stores other than for food, concerts, summer fun, BBQ's here or at friends houses.....just about everything has been impacted in our daily lives."

"Every thing being closed. It is so annoying. The beach is closed! The park is closed. Can't go out to a restaurant."

Q11 - Overall, how much of an impact would you say the Coronavirus/COVID-19 situation has had on your daily life? Base: COVID-19 Aware

Ninety percent of Americans are still engaging in some form of social distancing and reducing their daily physical interactions with others. In line with previous weeks, 70% are cutting discretionary spending to ease the economic burden resulting from the pandemic.

Behavioral Changes due to Coronavirus/COVID-19*

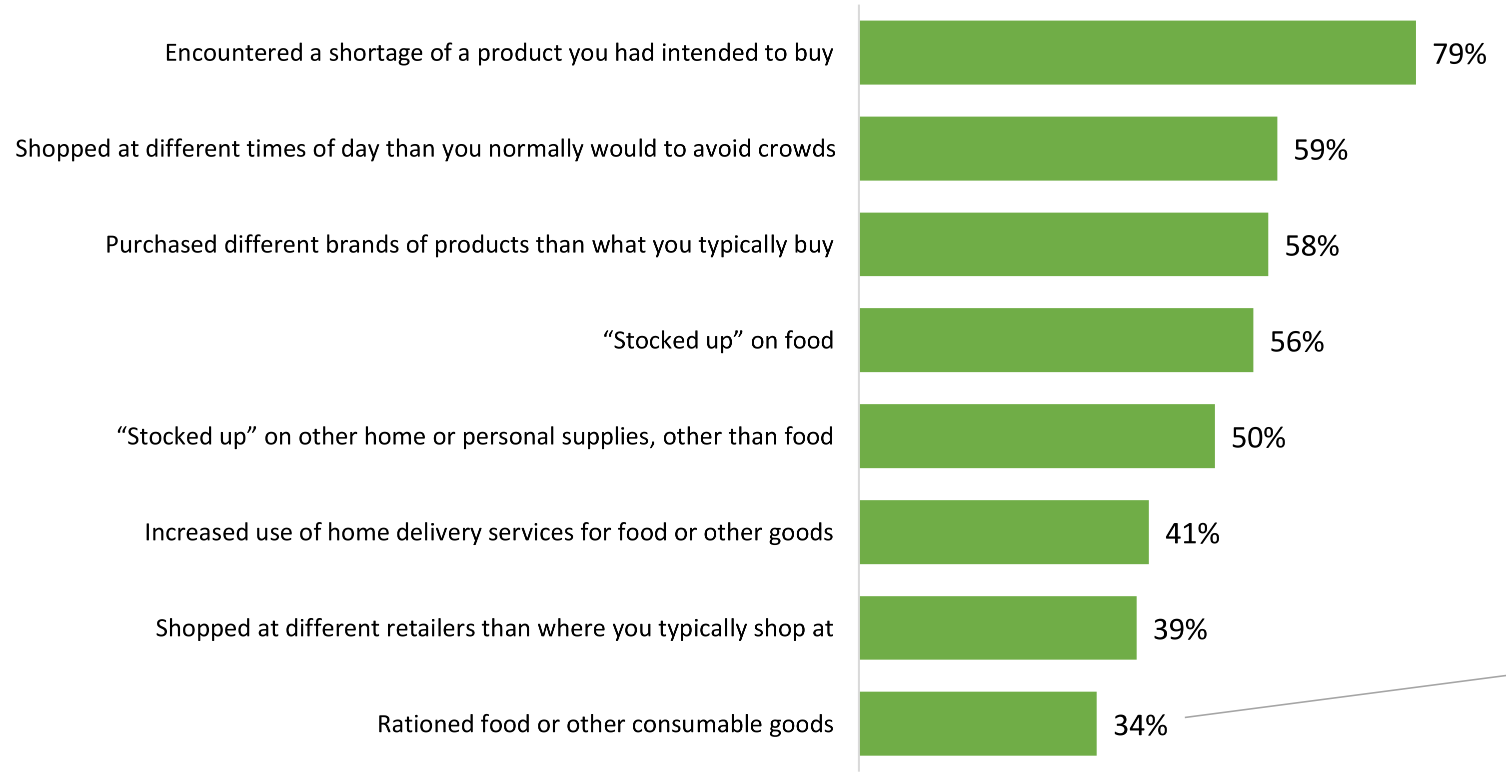


Higher income households ($100k+/year) are more likely than lower-income households to
- Alter daily schedule (73%)
- Reduced cash transactions (69%)

Q13 - Please indicate whether or not you have engaged in each activity below specifically as a result of the Coronavirus/COVID-19 situation within the past week (Note: these may be for economic reasons or due to social distancing measures you may be taking). % Answering “Yes”. Base: COVID-19 Aware

Consistent with several previous weeks, 80 percent of American consumers report encountering a product shortage of something they had intended to buy. A significant portion are also shopping at different times of the day and are purchasing atypical brands.

Shopping, Purchasing Experiences due to Coronavirus/COVID-19*

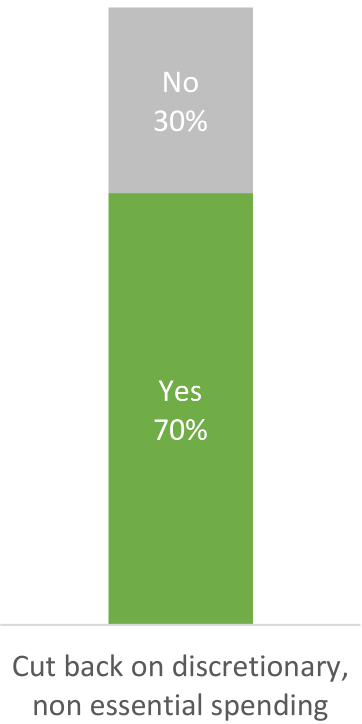


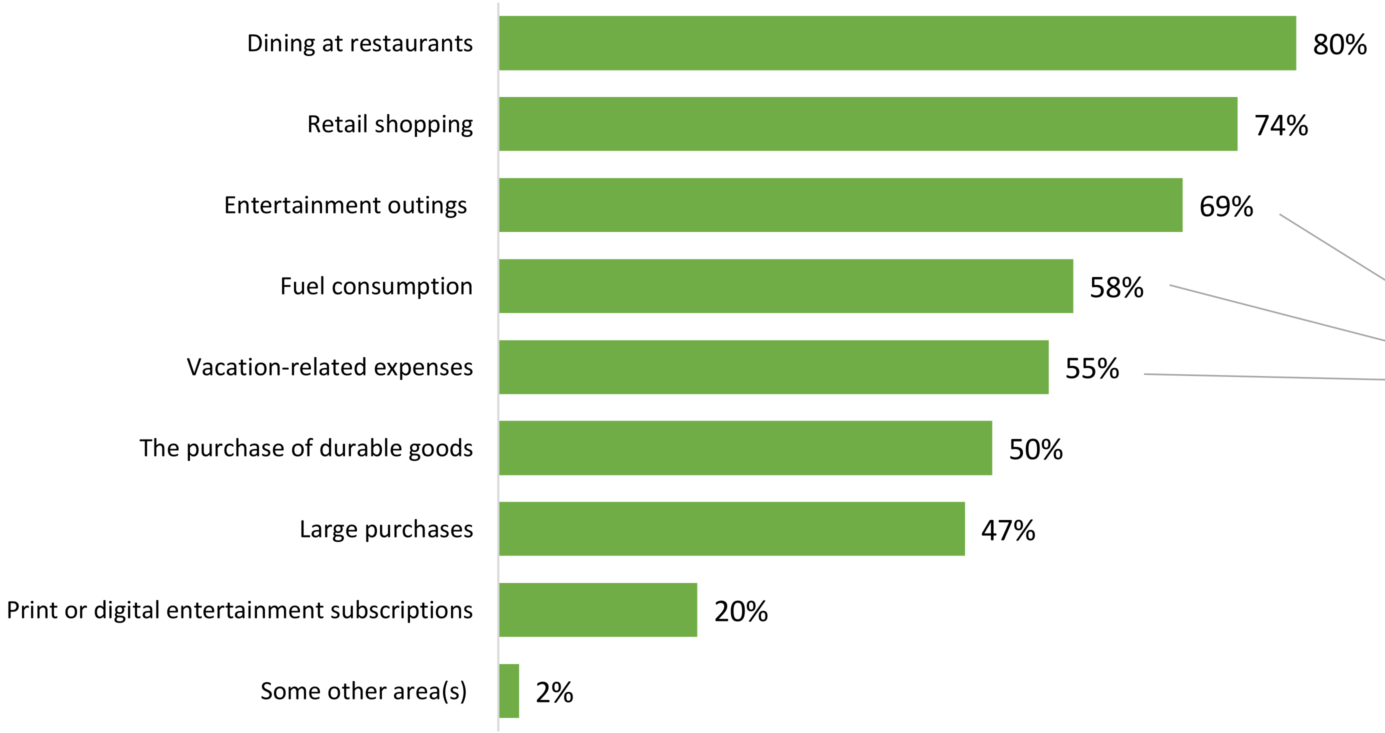
Lower income households (<$50K/year) are more likely than higher income households to ration food or other goods (39%).

Q14 - And now for each of these shopping and purchasing activities, please indicate whether or not you have engaged in this activity specifically as a result of the Coronavirus/COVID-19 situation within the past week: % Answering "Yes". Base: COVID-19 Aware

Cuts to discretionary spending are consistent with previous weeks. Dining, shopping, and other entertainment outings are the first to be cut as consumers continue to uphold social distancing measures.

Areas of Reduced Discretionary Spending due to Coronavirus/COVID-19*



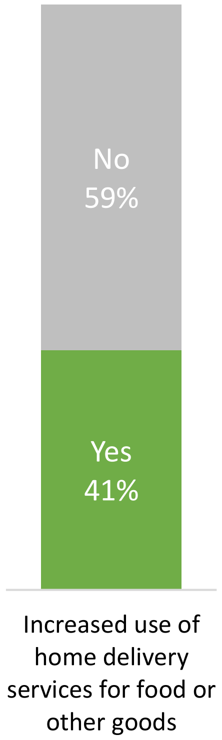


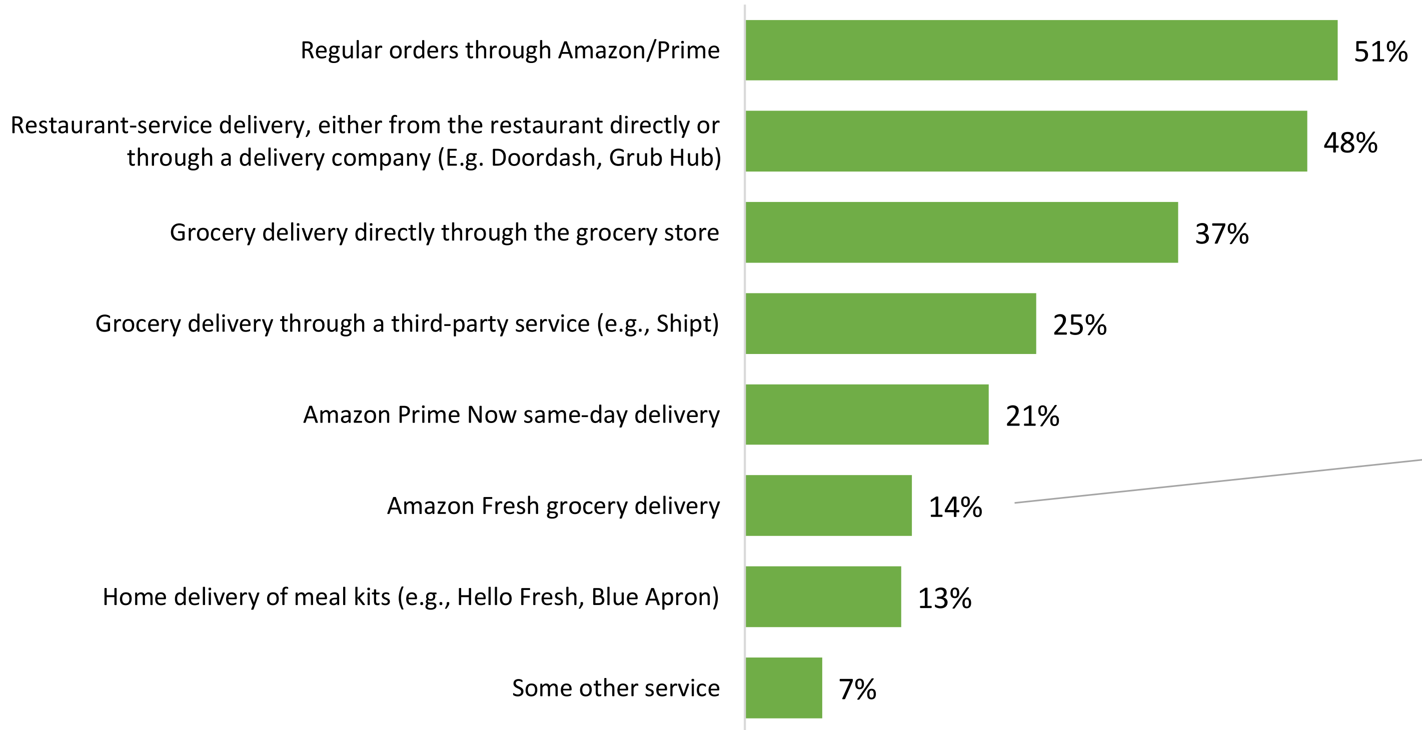
Higher income households ($100K+/year) are more likely to cut:
- Entertainment outings (76%)
- Vacation-related expenses (72%)
- Fuel consumption (70%)

Q15 - You indicated that you have reduced discretionary/non-essential spending as a result of the Coronavirus/COVID-19 situation within the past week. In which of these areas, if any, have you reduced spending?
Base: COVID-19 Aware who answered "Yes" to "Cut back on discretionary, non-essential spending" (Q13)

Among the 41 percent of American consumers who report increasing their use of home delivery services this week (as a result of the pandemic), Amazon remains the most likely to see a surge. Restaurant service delivery continues to be utilized at a higher rate as well.

Increased Home Delivery for Food, Other Goods due to Coronavirus/COVID-19*





Higher income households ($100k+/year) are more likely to increase use of:

- Amazon Fresh (26%)

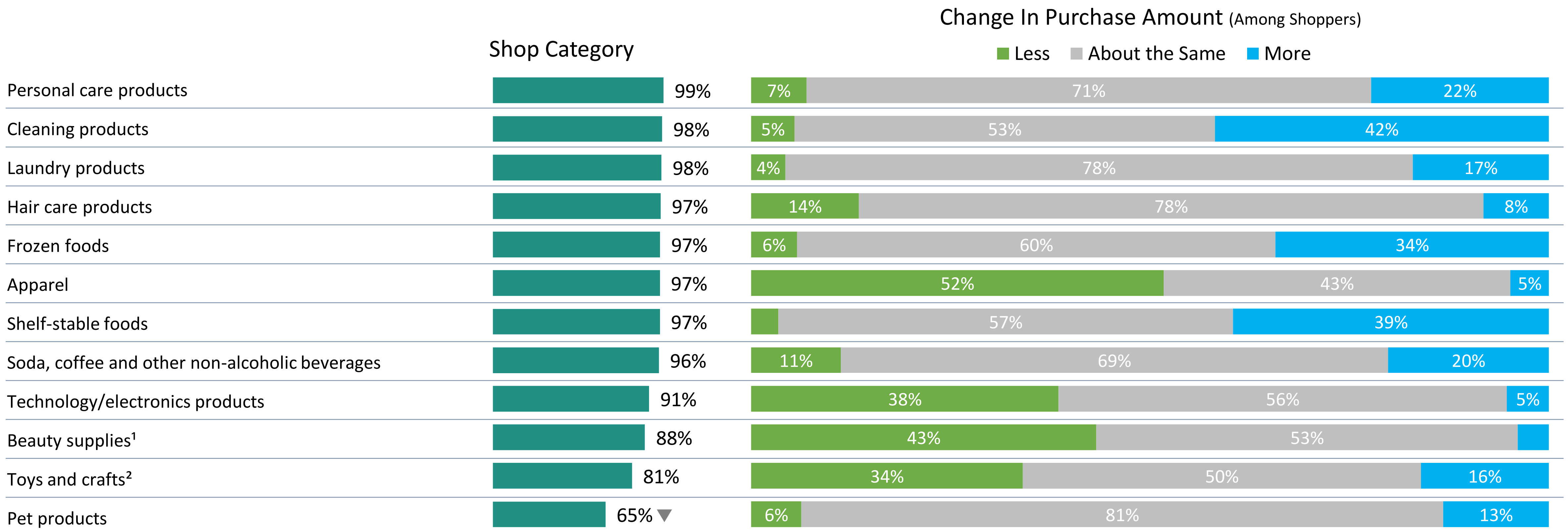
Q16 - You indicated that you have increased your use of home delivery services for food or other goods as a result of the Coronavirus/COVID-19 situation. Which of the following service are you using, either for the first time or more than you did before? Base: COVID-19 Aware who answered "Yes" to "Increased use of home delivery services for food or other goods" (Q14)

Changing Purchase Behaviors

- Category Purchase Volume
- Brand Loyalty

Non-essential categories such as apparel, tech products, beauty supplies, and toys and crafts continue to be the most likely to see reduced spending. Conversely, cleaning products, shelf stable foods, and frozen foods continue to see an increase in traffic.

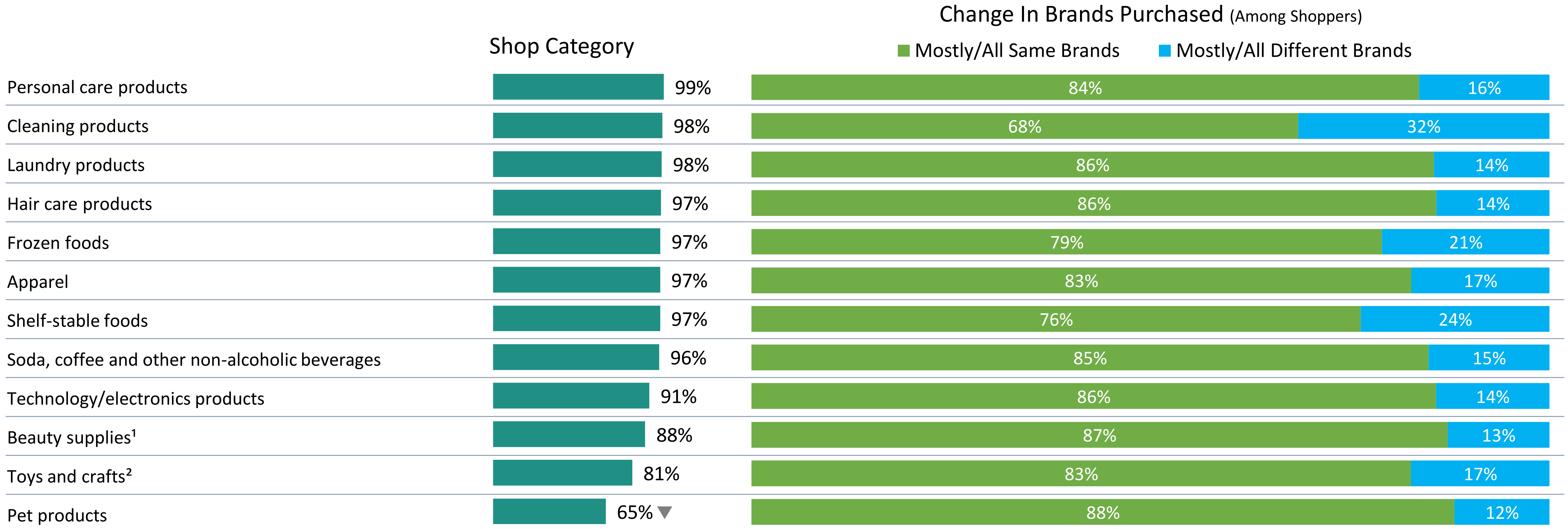
Coronavirus/COVID-19 Impact on Categories Shopped



Q17 - Since the Coronavirus/COVID-19 situation began, have you purchased more, less, or about the same amount that you typically purchase in each category? Base: COVID-19 Aware
[1]Only shown to females; [2]Only shown to those with children or grandchildren ages 0-17

As consumers face product shortages and new retail environments, several product categories are prone to brand-switching – especially cleaning products, shelf-stable foods, and frozen foods.

Coronavirus/COVID-19 Impact on Brands Purchased



Q18 - Since the Coronavirus/COVID-19 situation began, have you purchased all or mostly of the same brands or different brands that you typically purchase in each category? Base: COVID-19 Aware Who Shop Category (Q17)
[1]Only shown to females; [2]Only shown to those with children or grandchildren ages 0-17

Brand switching continues to be driven by a number of factors – most notably, shortages at the shelf. Consumers are also looking for more affordable options as they search for ways to reduce spending.

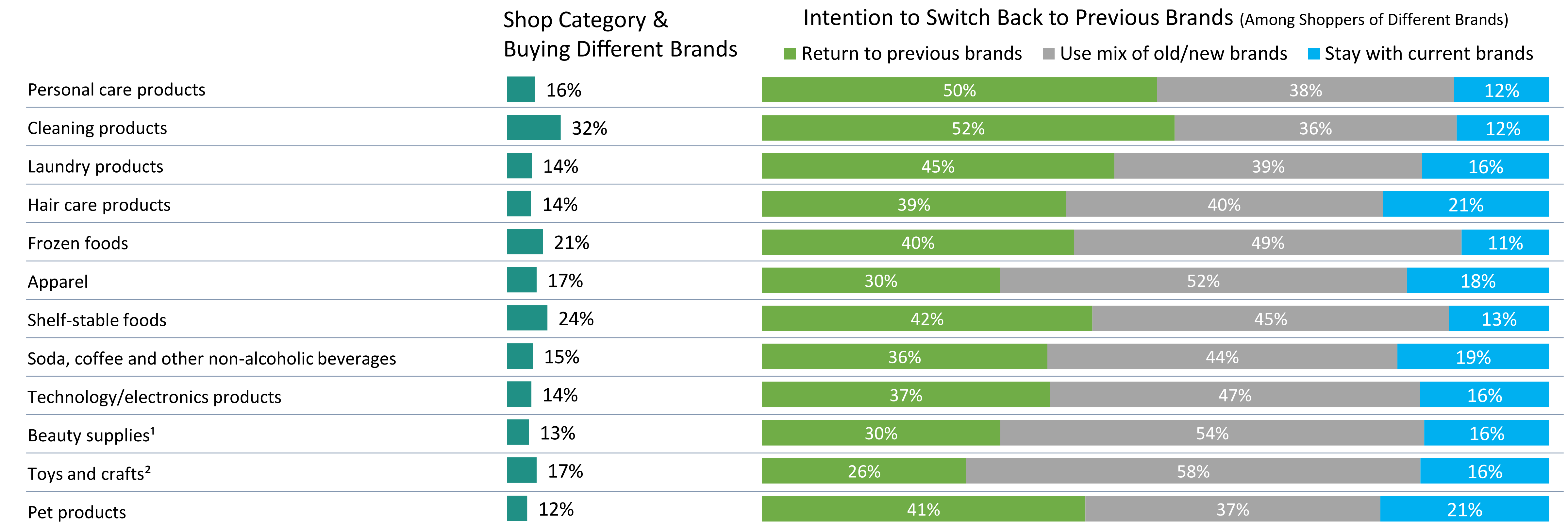
Coronavirus/COVID-19 Impact on Brands Purchased – Reasons for Buying All/Mostly Different Brands

	Shop Category & Buying Different Brands	Preferred brand(s) is not available	Buying more affordable brands	Just to have more variety	Switching to higher quality/better performing options	Some other reason(s)
Personal care products	16%	52%	35%	20%	16%	0%
Cleaning products	32%	63% ▼	26%	14%	11%	2%
Laundry products	14%	42%	36%	20%	19%	1%
Hair care products	14%	31%	38%	31%	21%	2%
Frozen foods	21%	50%	27%	31%	12%	1%
Apparel	17%	18% ▼	46%	34%	14%	6%
Shelf-stable foods	24%	47%	30%	29%	13%	1%
Soda, coffee and other non-alcoholic beverages	15%	33%	39%	33%	15%	2%
Technology/electronics products	14%	27%	44%	19%	19%	5%
Beauty supplies[1]	13%	25%	32%	43%	26%	5%
Toys and crafts[2]	17%	27%	32%	31%	21%	2%
Pet products	12%	36%	36%	21%	18%	4%

Q18a - For each of these categories in which you are buying all or mostly different brands, which of the reasons below describe why you're switching brands? Base: COVID-19 Aware Who Shop Category (Q17)
[1]Only shown to females; [2]Only shown to those with children or grandchildren ages 0-17

As has been the case in previous weeks, consumers who have switched brands during the pandemic largely do not expect to fully return to their original brands. Most will use a mix of new and old brands once the pandemic eases.

Coronavirus/COVID-19 Impact on Brand Purchased – Anticipated Usage Once Pandemic Subsides



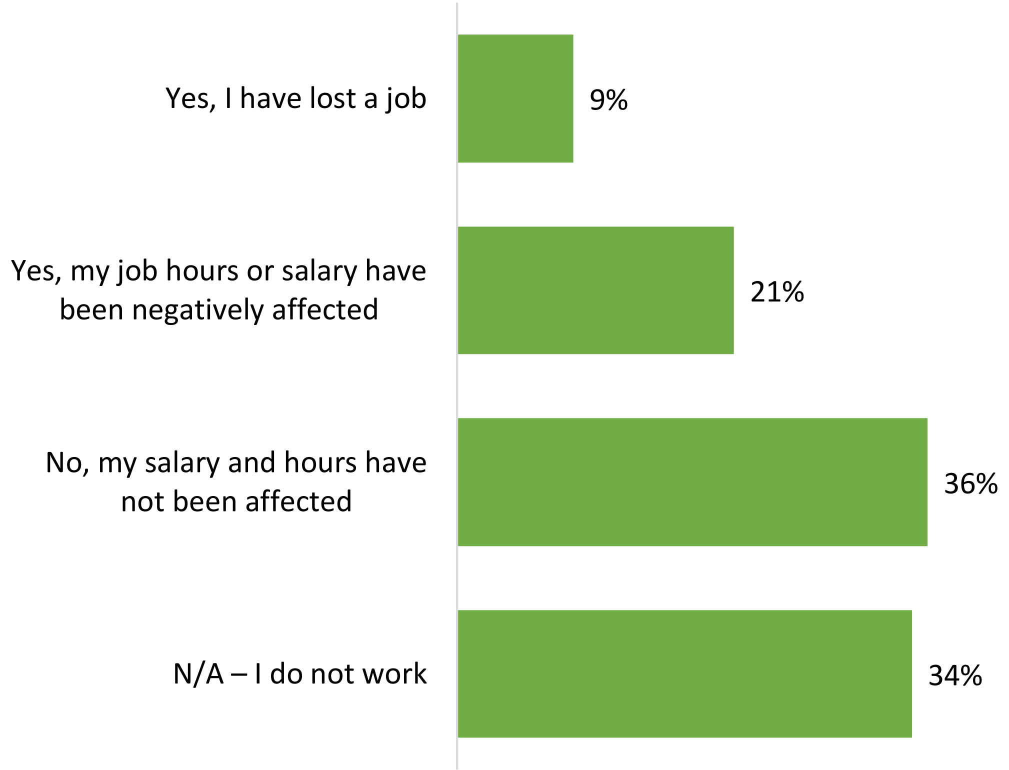
Q18b - And, for each of these categories in which you are buying different brands, once the pandemic's effects ease do you think that you will...[answer options]? Base: COVID-19 Aware Who Shop Category (Q17)
[1]Only shown to females; [2]Only shown to those with children or grandchildren ages 0-17

Employment Impact

- Effect on Job Status, Hours Worked
- Job Impact Recovery

Job loss remains steady at around 10 percent. Altogether, almost half of working Americans have had their employment impacted as a result of the pandemic.

Coronavirus/COVID-19 Impact on Employment



	Under 30	30 to 44	45 to 59	60 or older
Lost Job	13%	8%	7%	8%
Lost Job or Wages	**37%**	**34%**	**31%**	**19%**

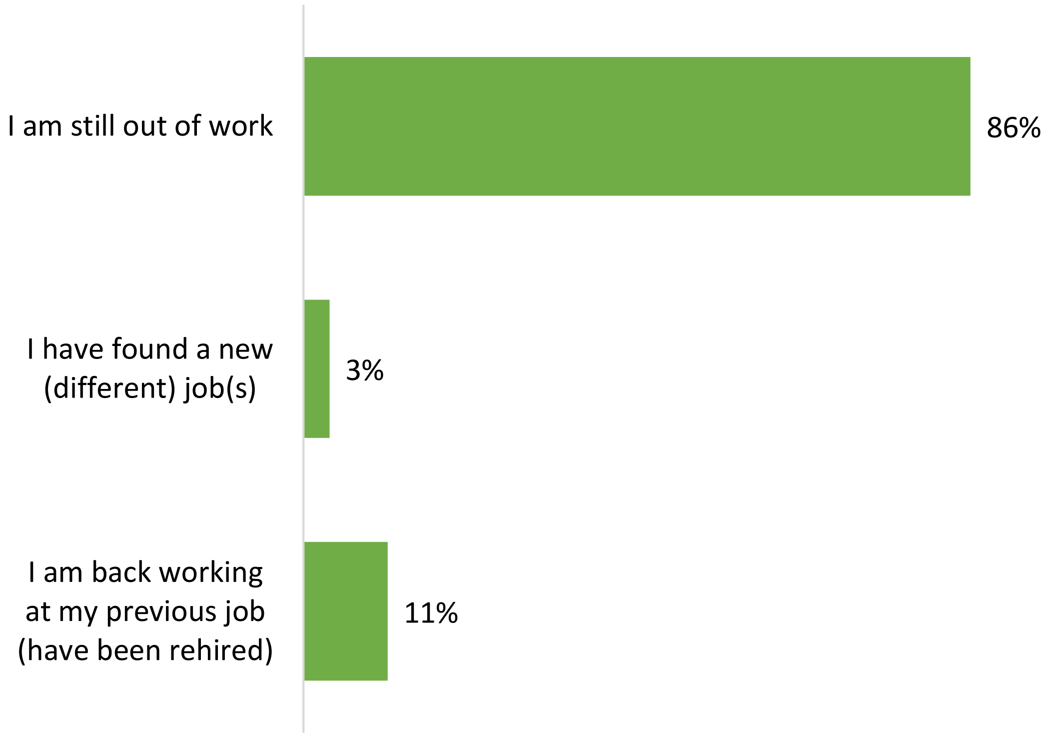
	Male	Female
Lost Job	8%	10%
Lost Job or Wages	29%	31%

	Northeast	Midwest	South	West
Lost Job	10%	10%	7%	10%
Lost Job or Wages	32%	33%	29%	27%

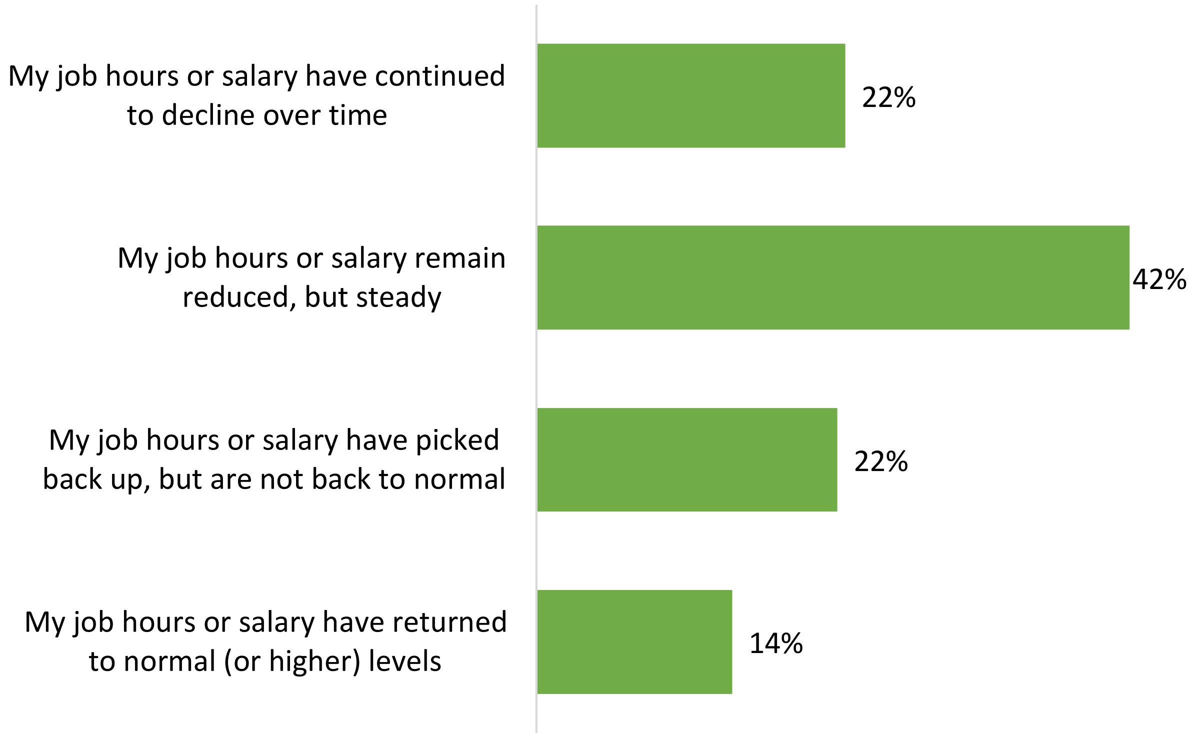
Q19 - At any point, did you lose a job or were your job hours or salary negatively affected by the Coronavirus/COVID-19 situation? Base: COVID-19 Aware

More than four out of five who have lost a job due to the pandemic remain out of work today, and just one in ten have returned. Among those who experienced a pay cut, the vast majority say their pay remains reduced.

Employment Recovery Among Those Who Lost Job



Employment Recovery Among Those With Reduced Hours/Salary



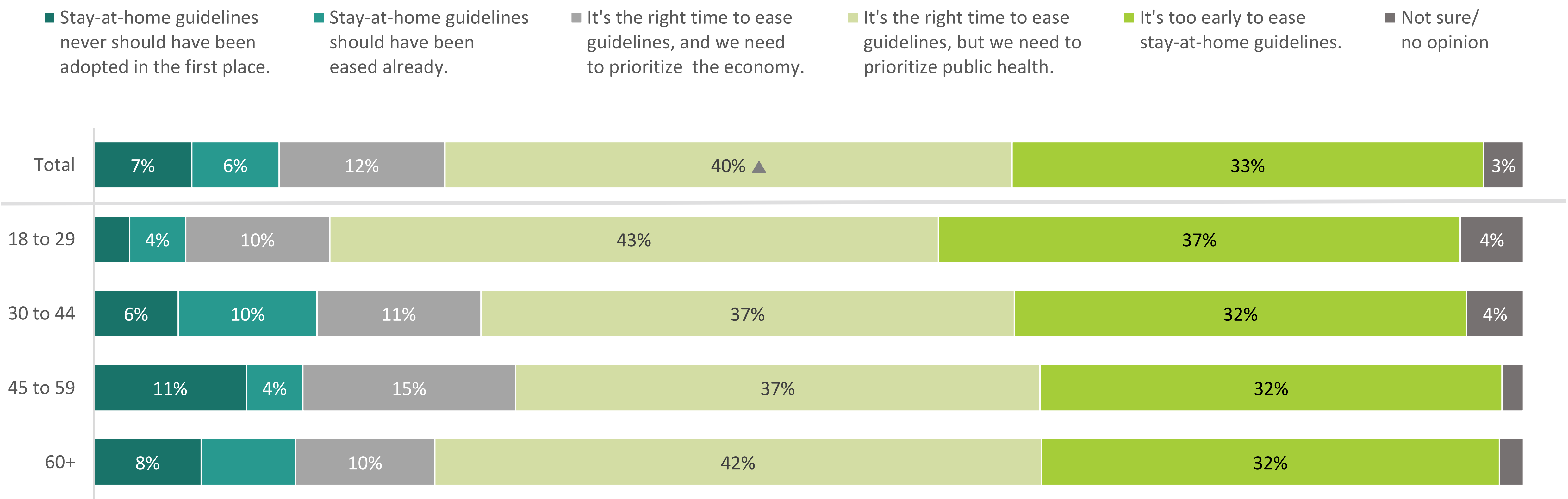
Q19a - You indicated that you have lost a job due to the Coronavirus/COVID-19 situation. Which statement below best describes your current situation regarding that job loss? Base: COVID-19 Aware and had lost job
Q19b - You indicated that your job hours or salary were negatively affected by the Coronavirus/COVID-19 situation. Which statement below best describes your current situation regarding that loss of income? Base: COVID-19 Aware and had hours or salary impacted

Outlook

- Consumer Confidence
- Projected Impact
- Anticipated Recovery Time
- Addendum Topics

More Americans feel it's the right time to begin reopening this week, as long as public health remains the priority. However, one-third of Americans say it's still to early to begin reopening. Perceptions that it is too early remain highest among 18-29 year olds.

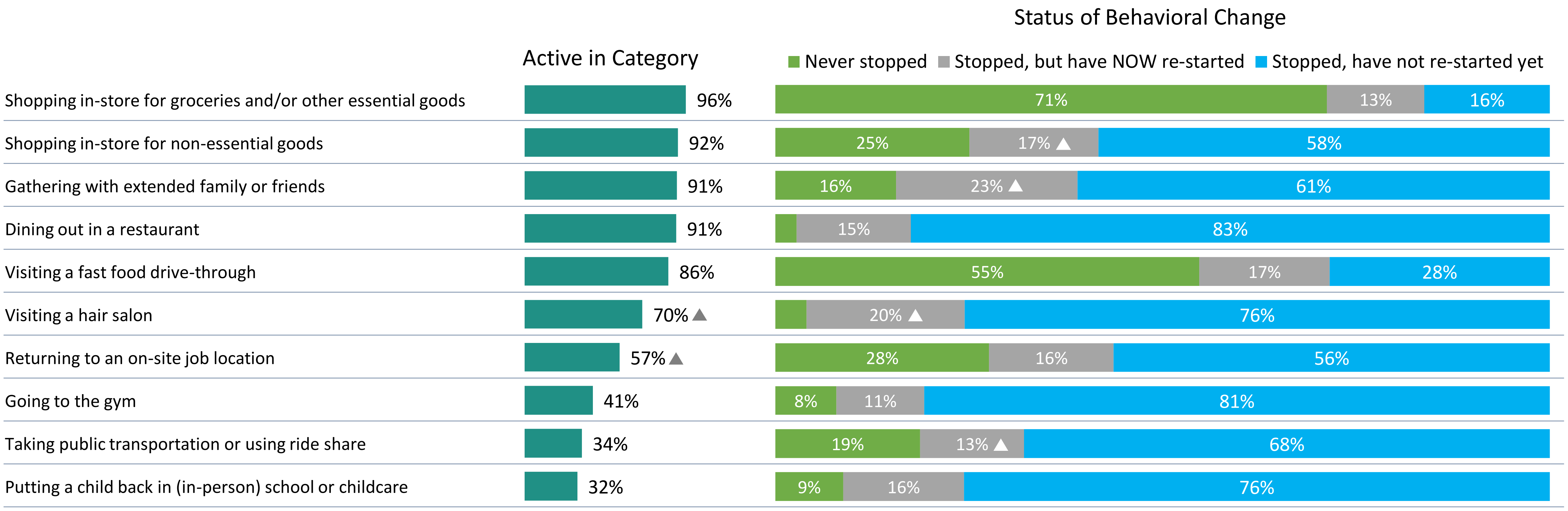
Perceptions of "Reopening"



Q33 - Which of the following statements best describes how you feel when it comes to easing stay-at-home guidelines and allowing businesses to reopen? Base: COVID-19 Aware

Some activities that were put on hold due to the pandemic are starting to resume. More people are shopping in-store, gathering with others, visiting hair salons, and using public transportation this week.

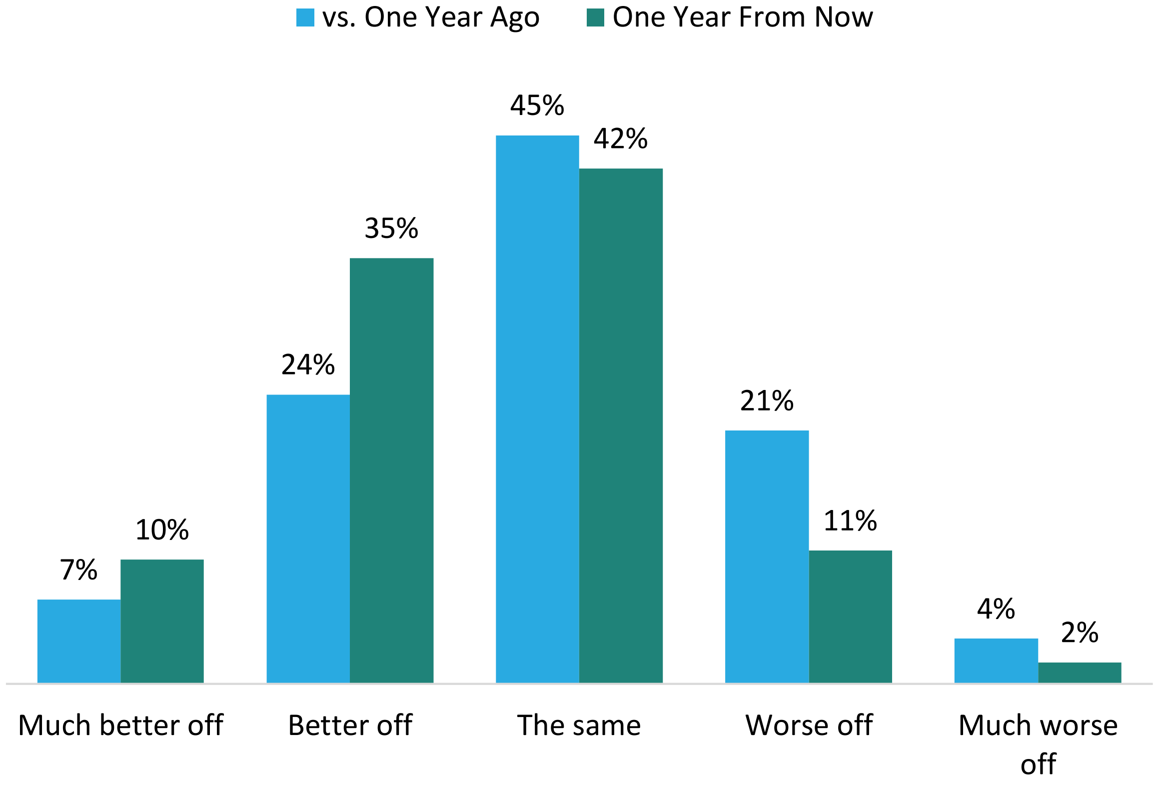
Behavioral Change as Communities Reopen



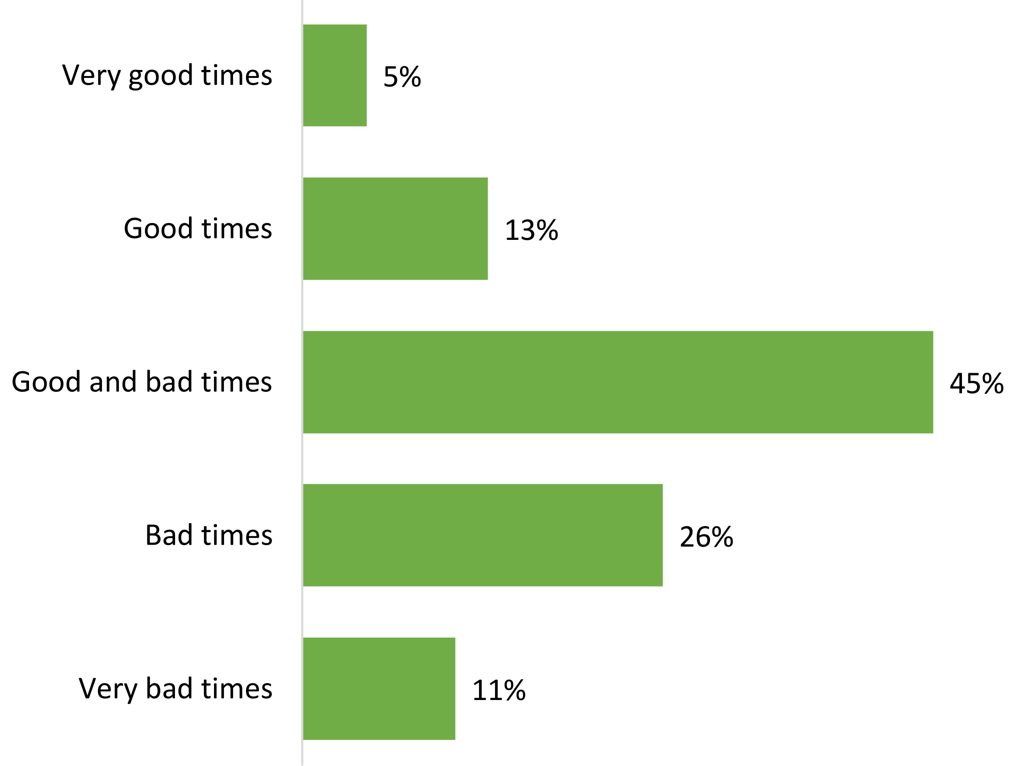
Q35 - As communities reopen, we are interested in understanding how people's behaviors may be changing. For each activity below, please indicate if you never stopped engaging in the behavior due to COVID-19, you stopped due to COVID-19 and have not re-started, you stopped but now have started engaging in the activity again, or if the activity does not apply to you at all (N/A).

Most Americans are holding on to optimism about their financial future, and expect to be the same or better off one year from now. Expectations for the year ahead for American business remain mixed.

Personal Financial State vs. One Year Ago, From Now



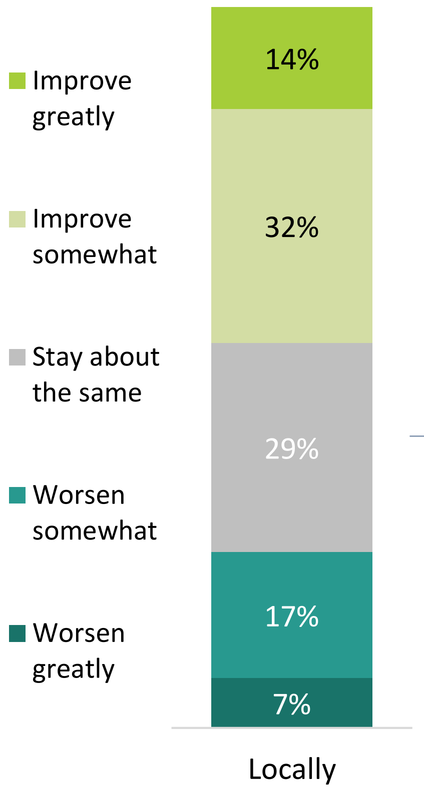
US Business Financial State Over Next 12 Months



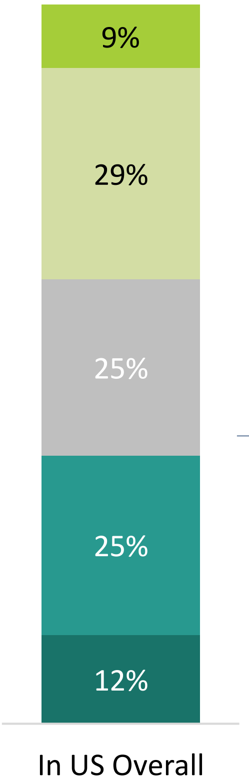
Q2 - Would you say that you/your family are better or worse off financially than you were a year ago? / Q3 - Now looking to the future: Do you think one year from now you/your family will be better or worse off than you are today? / Q4 - Now thinking about business conditions in general in the US: Do you think that during the next 12 months we'll have good or bad times financially? Base: COVID-19 Aware

There is no significant change in expectations this week for the how the COVID-19 pandemic will unfold at the local, national, and global levels over the coming 30 days. Americans remain somewhat more optimistic about their own local community’s future than about that of the US and the world in general.

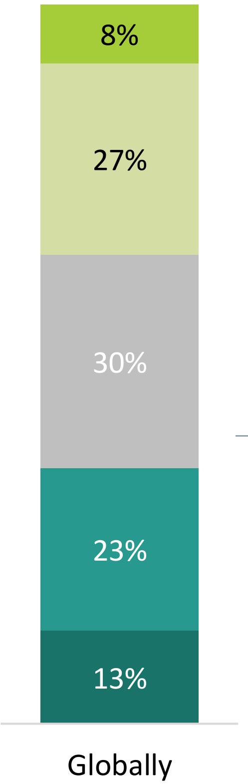
Anticipated Change to Coronavirus/COVID-19 Situation in Next 30 Day



	Worsen	Improve
Under 30	22%	50%
30 to 44	25%	45%
45 to 59	24%	45%
60 and older	27%	47%
Northeast	**14%**	51%
Midwest	**25%**	47%
South	**29%**	45%
West	**24%**	46%



	Worsen	Improve
Under 30	36%	34%
30 to 44	37%	38%
45 to 59	35%	39%
60 and older	41%	41%
Northeast	32%	**45%**
Midwest	37%	38%
South	40%	**35%**
West	38%	38%



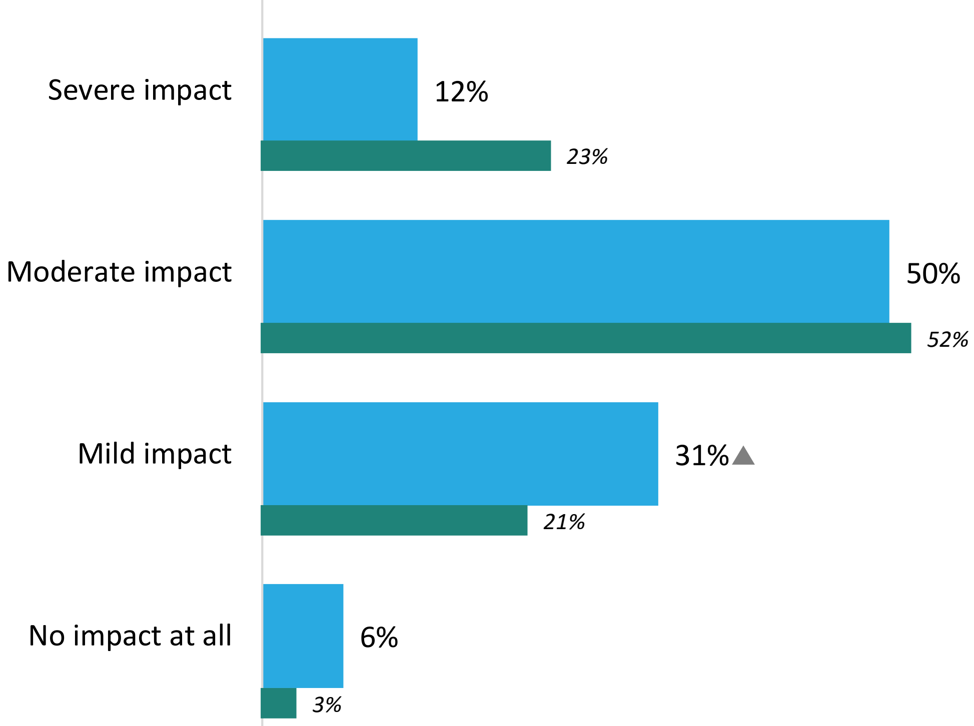
	Worsen	Improve
Under 30	**30%**	34%
30 to 44	**34%**	**33%**
45 to 59	**31%**	**41%**
60 and older	**46%**	**31%**
Northeast	33%	35%
Midwest	33%	38%
South	38%	32%
West	35%	36%

Q22 - Thinking locally, about the US overall, and globally, how do you expect the Coronavirus/COVID-19 situation to change in the next 30 days? Base: COVID-19 Aware

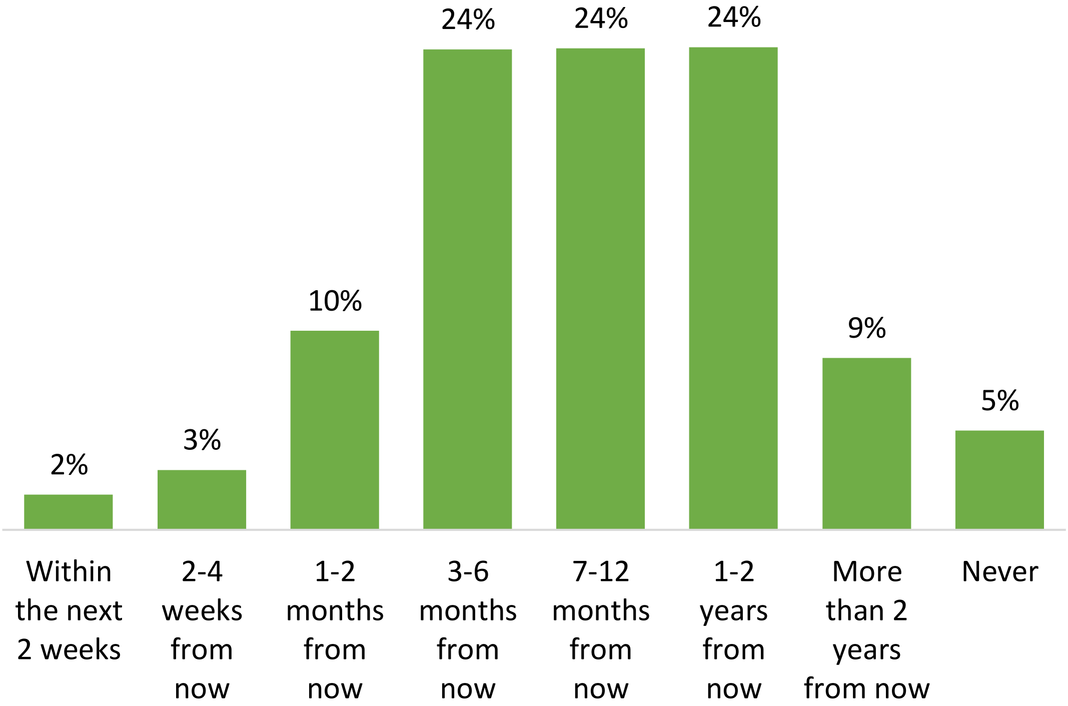
Over half of Americans still expect the pandemic to have at least a moderate impact on their lives over the next 30 days. Taking a longer term view, the average expected time until things are "back to normal" is steady at around 11 months.

Anticipated Impact on Daily Life in Next 30 Days

Compared to Reported Effect on Life to Date (Q11)



Anticipated "Back to Normal" Timeline



Q23 - Now fast forwarding 30 days, how much of an impact do you think the Coronavirus/COVID-19 situation will be having on your daily life at that time? Base: COVID-19 Aware
Q24 - What is your best guess about how long, if at all, it will take before your life is "Back to Normal" after Coronavirus/COVID-19? Base: COVID-19 Aware

Questions?

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