aytm

Covid-19 Pandemic Impact on US Consumers

W13 | June 25-26, 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 thirteenth wave of aytm's Covid-19 Consumer Tracker fielded Thursday, June 25 – Friday, June 26, 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.

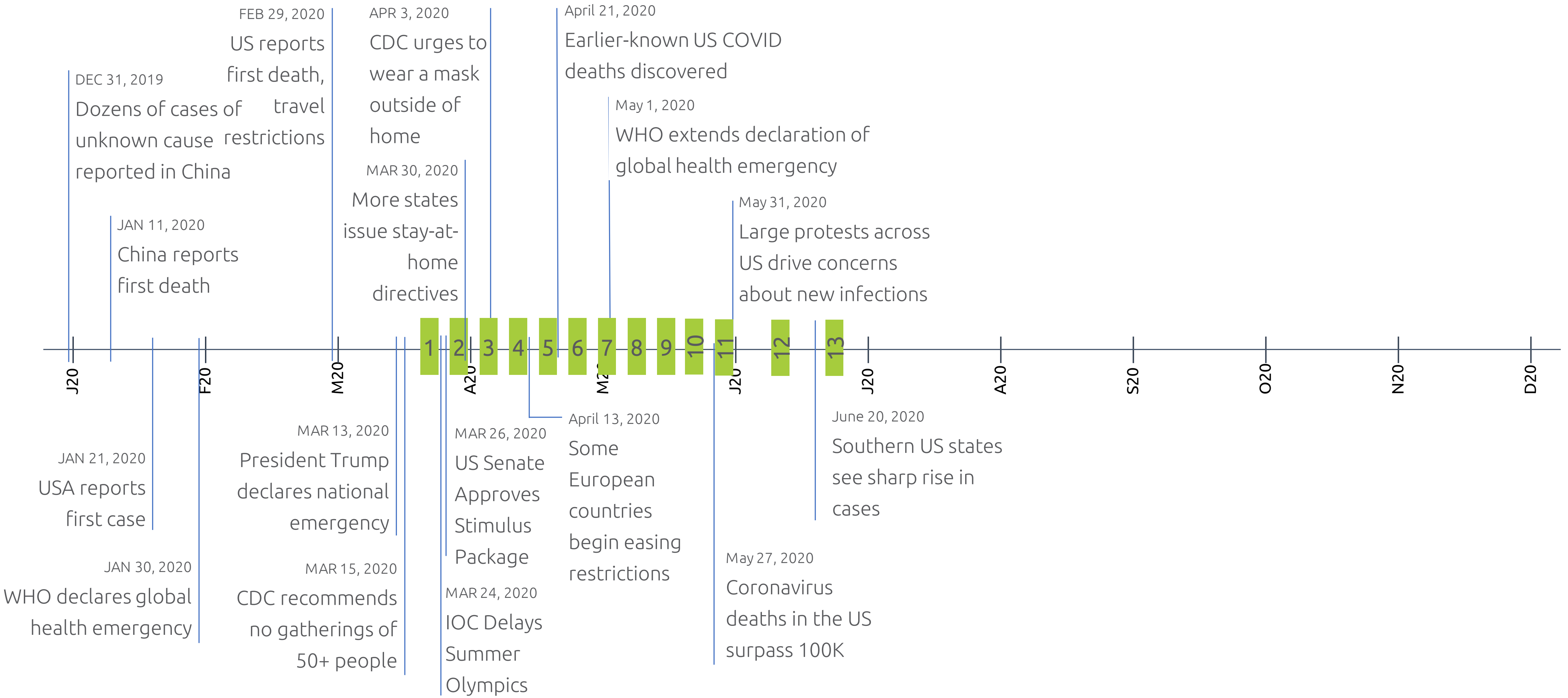
All significance testing is conducted at 95% confidence level with the effective base used as the sample base for statistical calculations (Effective Base = 1,000 for Total sample).

***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



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

Covid-19 KEY FINDINGS

With cases surging, pandemic anxieties increase across the US.

With Covid-19 cases reaching all-time highs, Americans are exhibiting heightened awareness this wave as more are consuming news about the pandemic. While many Americans are still feeling "Covid fatigue," the uptick in national cases has resulted in a spike in overall concern. These movements are the first significant increases in concern levels since April, and come after several sustained weeks of gradual decline. When compared with other major national and global topics of concern, Covid-19 remains the most pressing issue for a majority of Americans.

- Health concerns, particularly for older relatives, and economic anxiety are the primary contributors to pandemic-related stress. Although health and economic concern levels have stabilized somewhat, both remain elevated. Moreover, more Americans feel the pandemic is more severe than is being generally represented.

As worries grow and evolve, Americans' face an increasingly adverse way of life.

One-quarter of Americans have consistently reported severe impacts on their daily lives as a result of the outbreak. These effects are reported at disproportionately high levels for the young, the affluent, and those in the Northeast region of the nation. Either through all-out job loss or reduced salary or pay, one-third of the American population has seen the pandemic take a toll on their personal income.

- A majority of Americans, whether by choice or need, continue to cut discretionary spending and alter their consumption habits in other ways, as the pandemic continues to reshape the American consumer landscape.
- Two-thirds or more of those looking to conserve outgoing cash are cutting back on dining, shopping, and entertainment outings.
- Durable goods (and luxury goods in particular) remain at risk for reduced purchase levels as American consumers search for areas to cut spending. Nearly half of American shoppers are reducing their spending on apparel during the pandemic.
- Product stockouts remain an issue, and shortages are having potentially long-lived impacts on brand purchase behavior. Consistently, the cleaning products category has been among the most prone to brand-switching, along with frozen and shelf-stable foods. Half or more of consumers in these and other key categories plan to keep using at least a mix of previous and new brands once the pandemic slows.

Optimism plummets, yet the long-term view remains unshaken.

More Americans are expecting the Covid-19 situation to worsen than improve over the coming 30 days for the first time since early April, as optimism wanes and worries about the pandemic's long-lived effects mount. Over half expect the situation to worsen nationally. In apparent contrast to these trends, Americans' perceptions of reopening are largely unchanged, with a majority supporting reopening efforts under the condition that measures are taken to protect public health. Likewise, a portion of the population have begun visiting salons, dining out, gathering with friends and family, and shopping in stores again. And, as has been the case for several waves, most Americans remain confident that they will be either the same or better off one year from now financially.

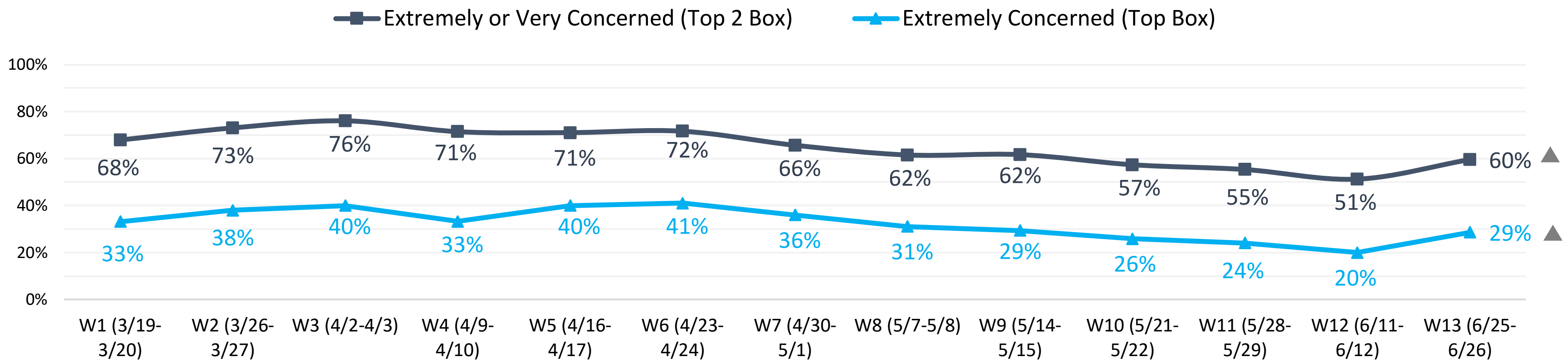
Wave over Wave Trends

- 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

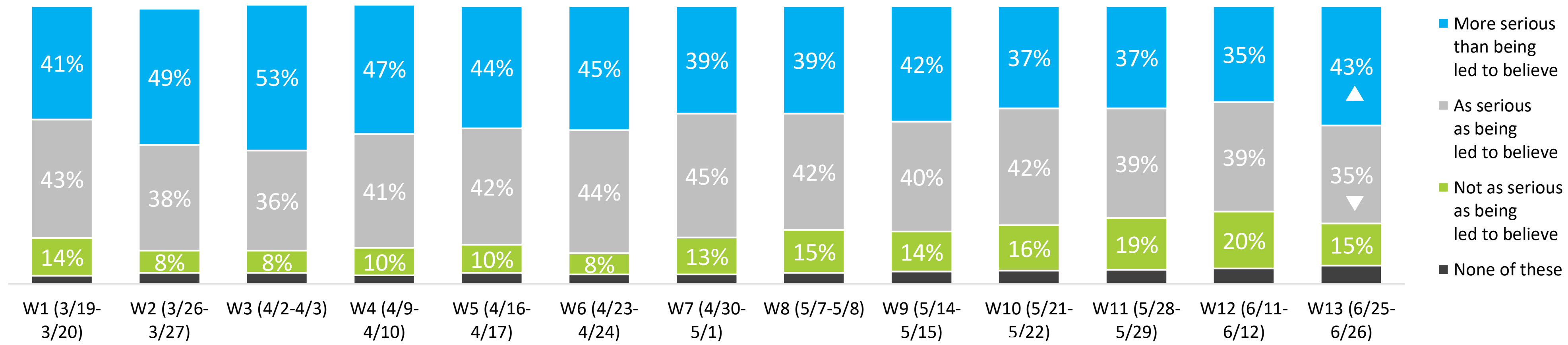
With an uptick in cases and national news coverage, concern for the Covid-19 pandemic rises sharply this wave for the first time in several weeks.

Coronavirus/Covid-19 Concern Level



Likewise, after easing slightly over several weeks, perceived severity of the pandemic increases this wave, with more Americans saying they feel the pandemic is worse than is being represented.

Coronavirus/Covid-19 Perceived Severity

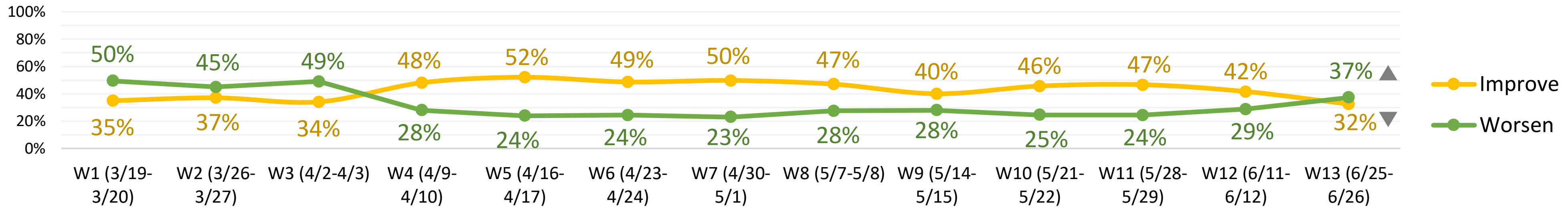


Q6 - Within the past month, have you heard (either through word-of-mouth, media, or some other source) any news, updates, or other information regarding the spread of the novel Coronavirus or Covid-19 in the US?
Q7 - Overall, how would you characterize your current level of concern about the Coronavirus/Covid-19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

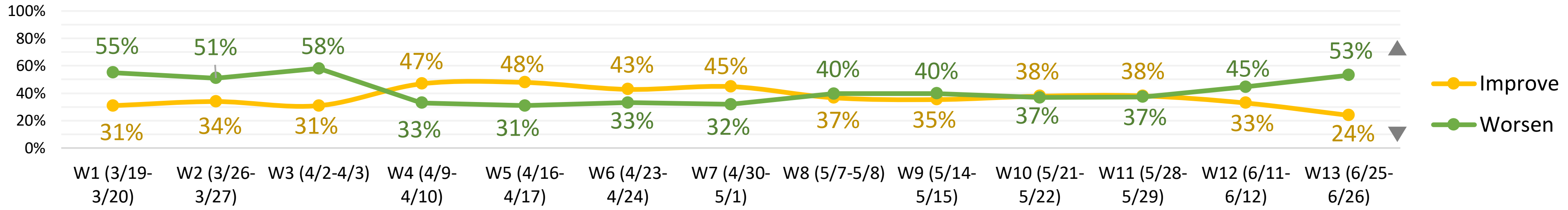
For the first time since early April, more Americans think their **local** Covid situation will worsen than think it will improve over the next 30 days.

Change Locally in Next 30 Days



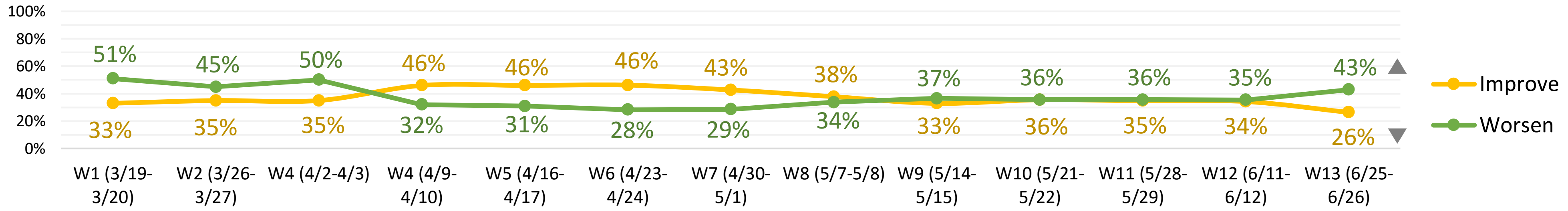
More than half of all Americans expect the Covid situation to worsen over the next 30 days **nationally.**

Change in US Overall in Next 30 Days



The **global** 30-day outlook turns more pessimistic this wave as well, with over 40 percent expecting the situation to worsen.

Change Globally in Next 30 Days

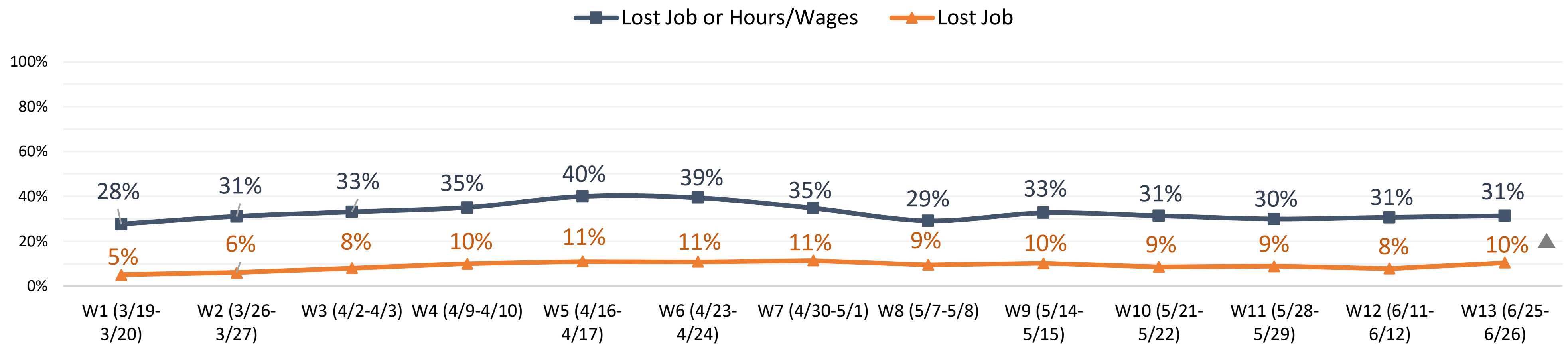


Q22 - Thinking locally, about the US overall, and globally, how do you expect the Coronavirus/Covid-19 situation to change in the next 30 days? Base: Covid-19 Aware

Employment, Financial Impact of Coronavirus/Covid-19

There is an uptick in those reporting outright lost jobs due to the pandemic this wave, although overall negative impacts to employment are relatively stable.

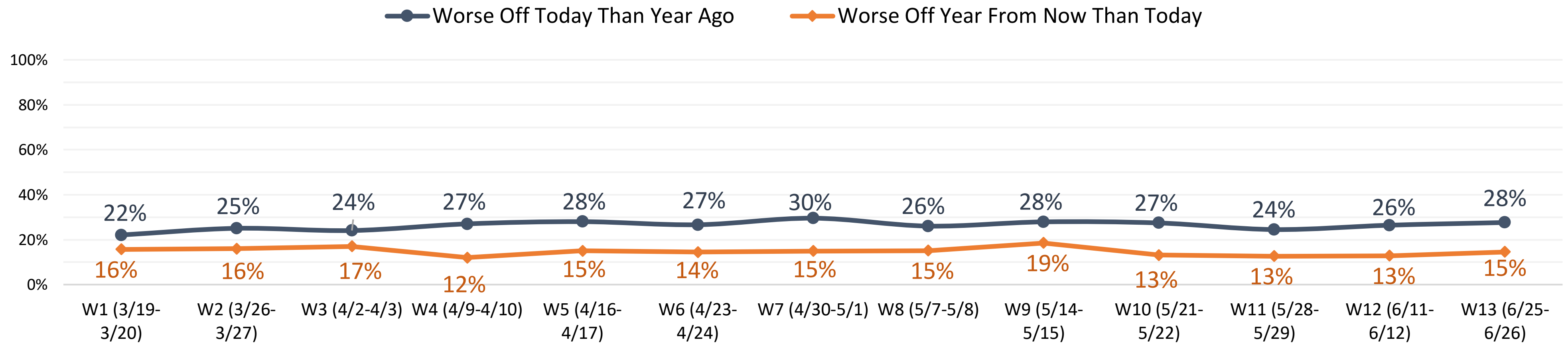
Coronavirus/Covid-19 Impact on Employment



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

Americans' expectations for their financial health remain consistent with previous waves, with only 15 percent expecting to be worse off financially one year from now.

Personal Financial State vs. One Year Ago, From Now



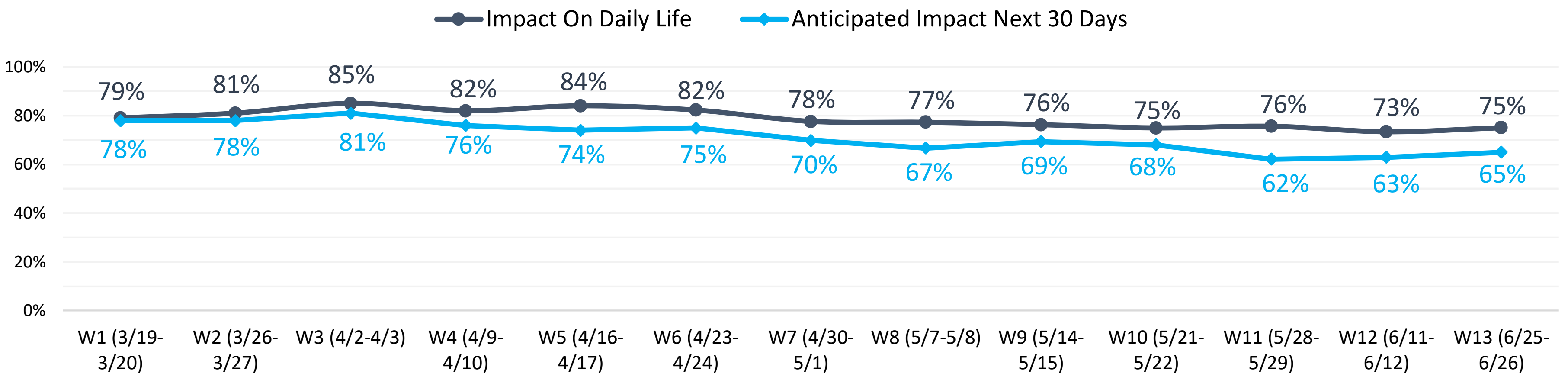
Q19 - At any point, did you lose a job or were your job hours or salary negatively affected by the Coronavirus/Covid-19 situation? Base: Covid-19 Aware | Q2 - Would you say that you/your family are better or worse off financially than you were a year ago? / Q3 - Now looking to the future: Do you think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

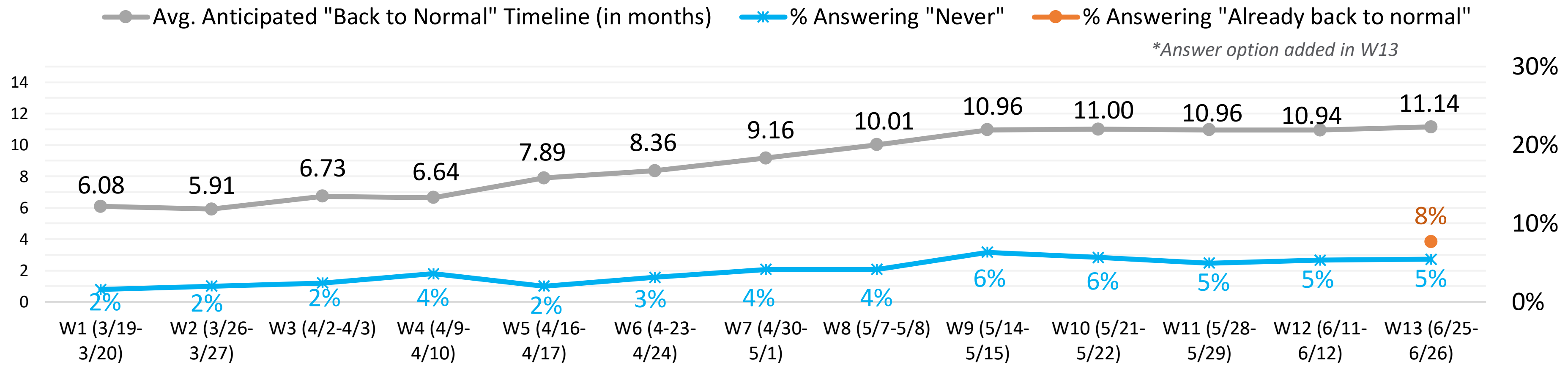
Despite the spike in concern levels, the number of Americans expecting a severe or moderate impact on their daily lives over the next 30 days is flat at about two-thirds.

The average anticipated time until things are "back to normal" also remains relatively unchanged at 11 months.

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



Anticipated "Back to Normal" Timeline



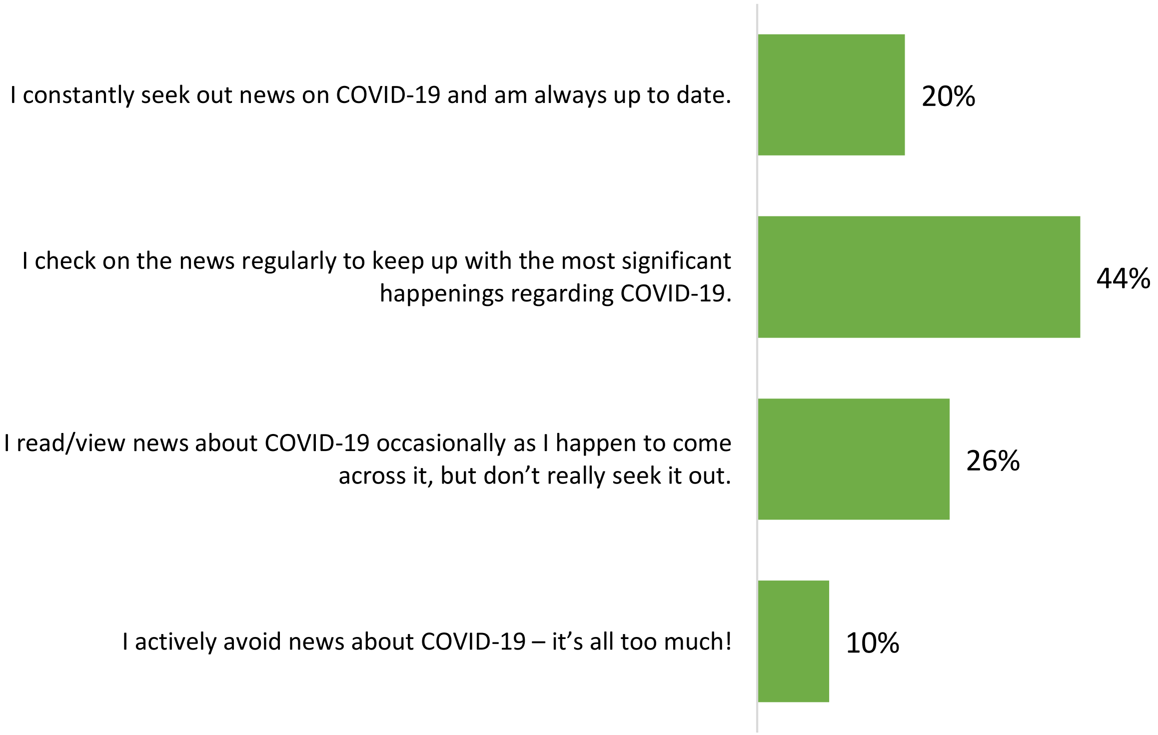
Q11 - Overall, how much of an impact would you say the Coronavirus/Covid-19 situation has had on your daily life? Base: Covid-19 Aware
Q23 - Now fast forwarding 30 days, how much of an impact do you think the Coronavirus/Covid-19 situation will be having on your daily life at that time? Base: Covid-19 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

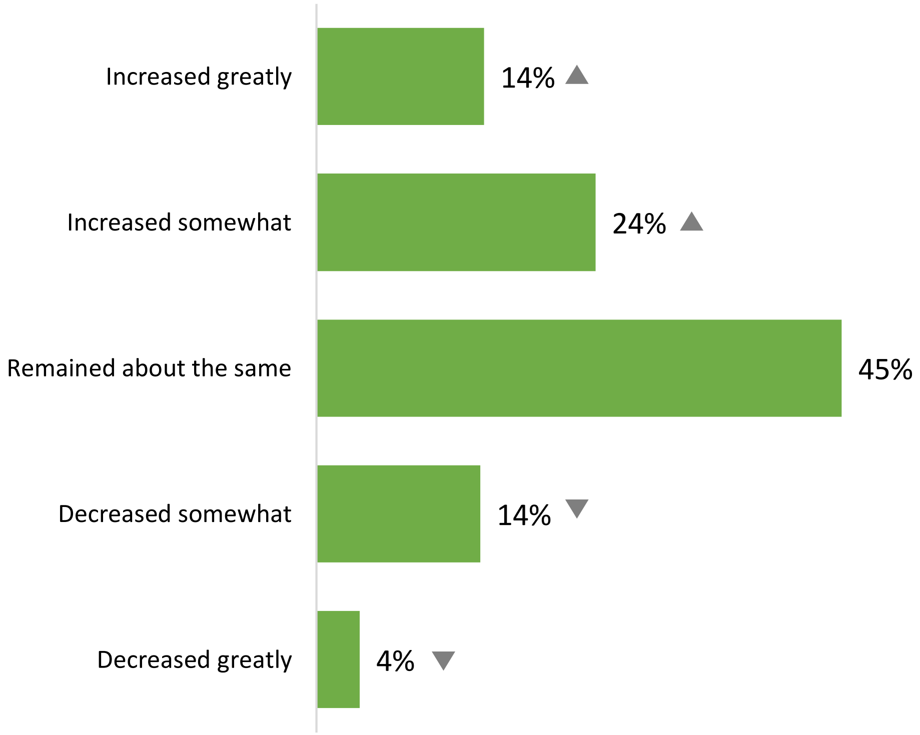
- Covid-19 Awareness, Concern
- Health Concerns
- Economic Concerns
- Perceived Severity

Attitudes toward Covid-related news are relatively unchanged this week: just one in five constantly seeks out news and updates on Covid-19, while the majority either don't seek out Covid-19 news or actively avoid it. With the recent surge in cases, more Americans are reporting increased consumption of Covid-19 news over the past week.

Attitudes toward News about Covid-19



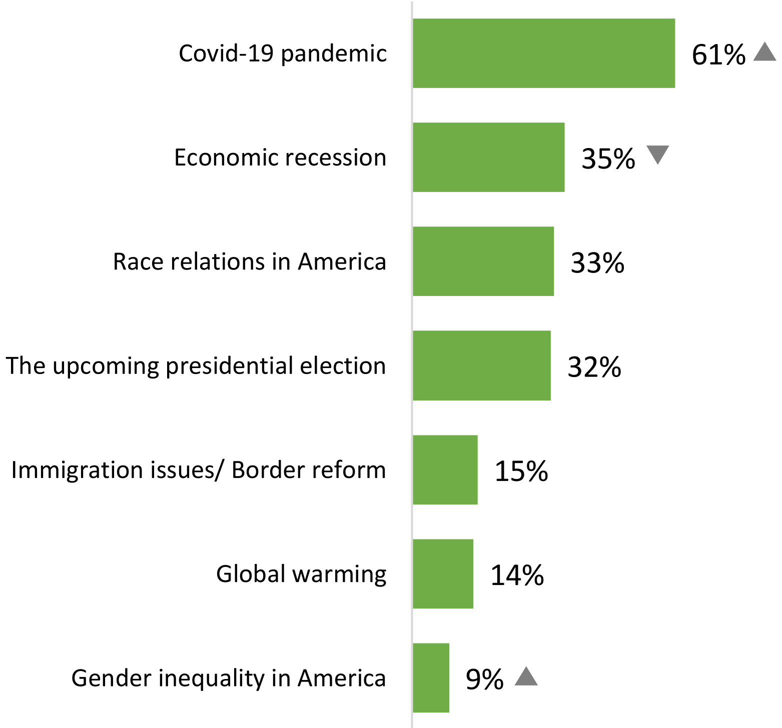
Change in Amount of News Consumed about Covid-19



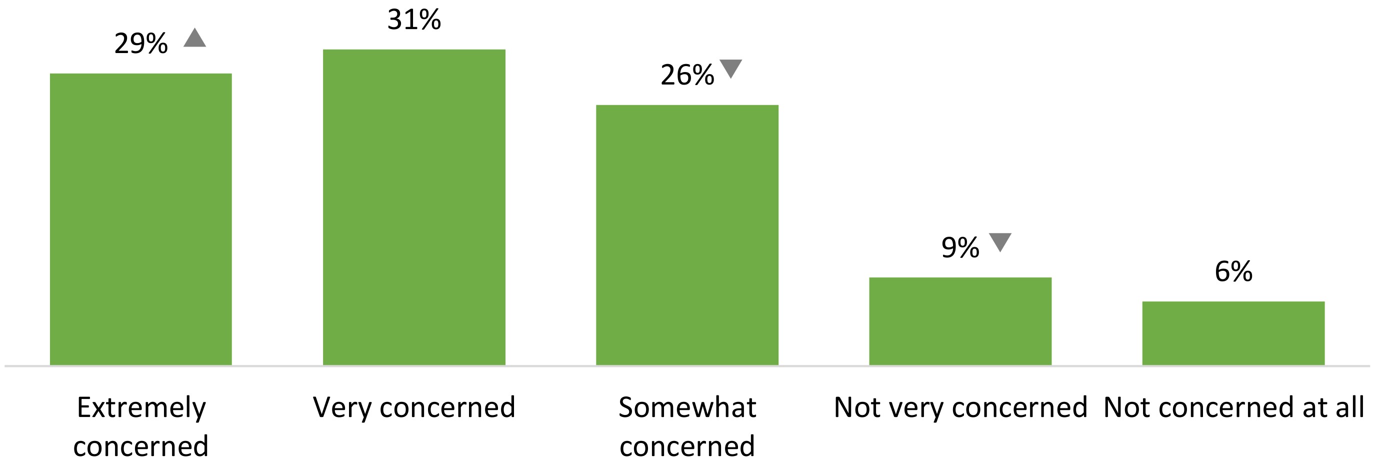
Q6b – Overall, which statement below best represents how you feel about the amount of news about the Coronavirus/COVID-19 situation that you personally read/view? Base: Total Covid-19-aware
Q6c - Within the past week, would you say the amount of news you've consumed related to COVID-19 has... Base: Covid-19 aware who read/watch news

Covid-19 concerns are even more top-of-mind than in the last wave, with six out of 10 Americans rating the pandemic as the first or second most pressing societal issue compared to a number of other current topics. Overall, top-box concern spikes sharply this wave, especially among those age 30-44 and 60 and older.

Social Issues/Concerns (% ranking first or second)



Coronavirus/Covid-19 Concern Level

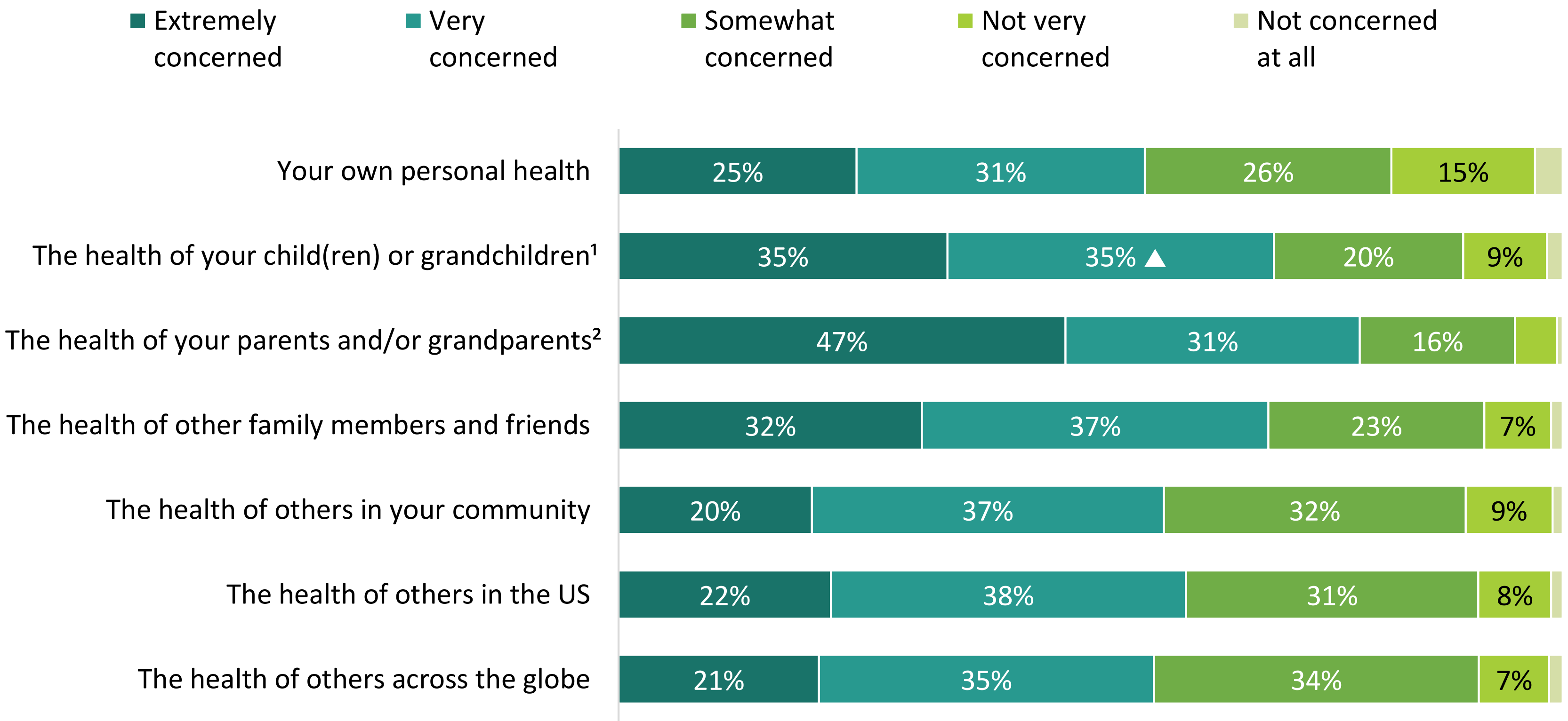


	Extremely concerned	Very concerned	Somewhat concerned	Not very concerned	Not concerned at all	T2B
Under 30	21%	29%	33%	9%	7%	50%
30 to 44	34%	35%	21%	5%	5%	69%
45 to 59	25%	31%	26%	9%	8%	57%
60 and older	33%	28%	23%	11%	4%	61%

Q1b - Please rank the issues below from the one that you are most concerned about to the one you are least concerned about
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

Health concerns remain high among a majority of Americans, especially concern for elderly relatives. Concern for the health of children and grandchildren increases this wave. Those in the 30-44 age range are particularly concerned with the health effects of the pandemic when compared to their older and younger peers.

Coronavirus/Covid-19 Health Concerns



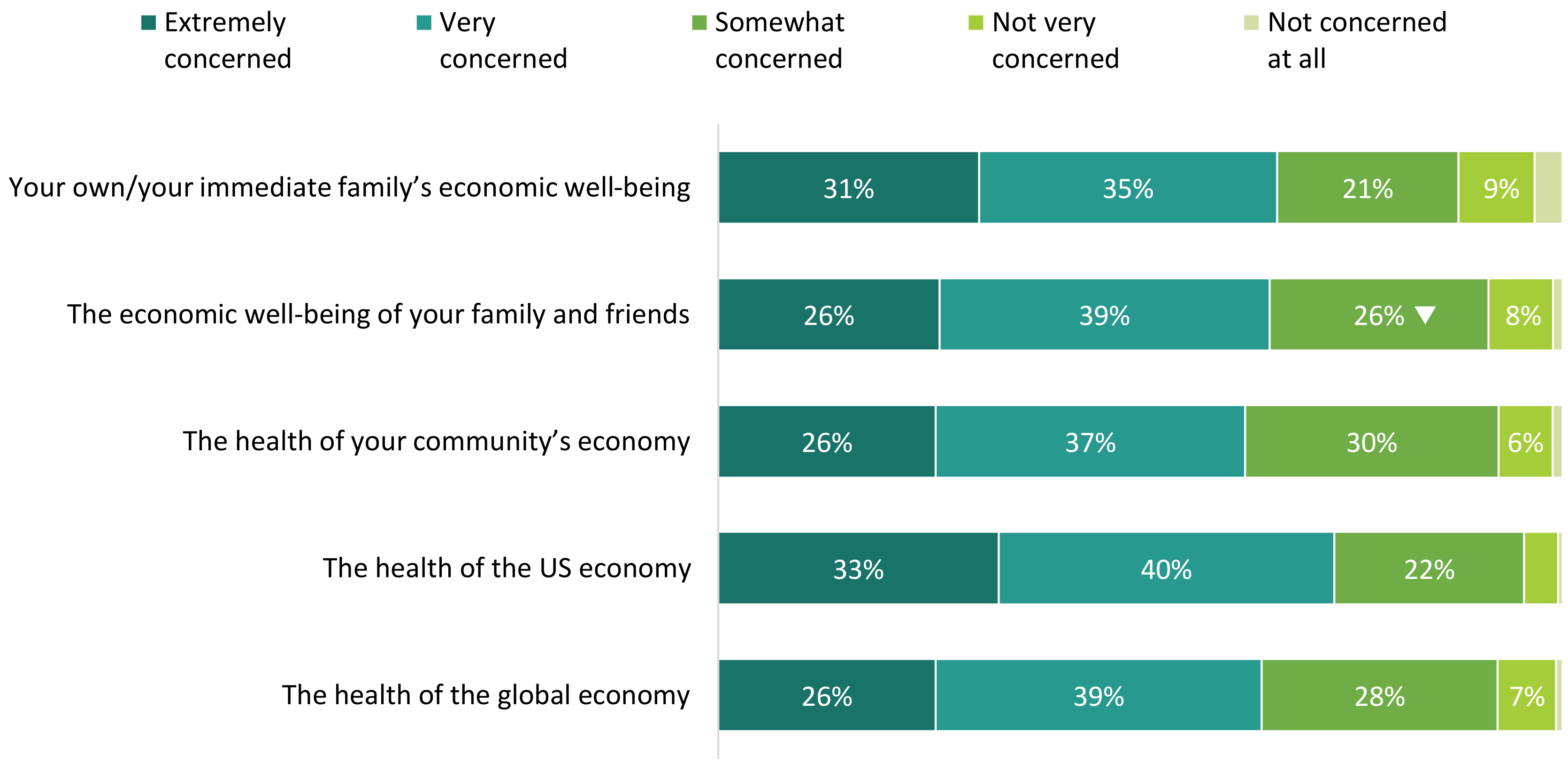
T2B (Extremely/Very Concerned)

	Total	Under 30	30 to 44	45 to 59	60 and older
Your own personal health	**56%**	47%	59%	54%	61%
The health of your child(ren) or grandchildren[1]	**69%** ▲	72%	80%	59%	70%
The health of your parents and/or grandparents[2]	**79%**	78%	86%	73%	77%
The health of other family members and friends	**69%**	71%	75%	61%	68%
The health of others in your community	**58%**	53%	66%	52%	59%
The health of others in the US	**60%**	55%	66%	56%	62%
The health of others across the globe	**57%**	55%	63%	51%	57%

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

Economic fears persist, and Americans are especially worried for the national economy, as has been the case for several weeks. Those under 30 are somewhat less concerned for the economic health of others beyond their immediate family and friends.

Coronavirus/Covid-19 Economics Concerns



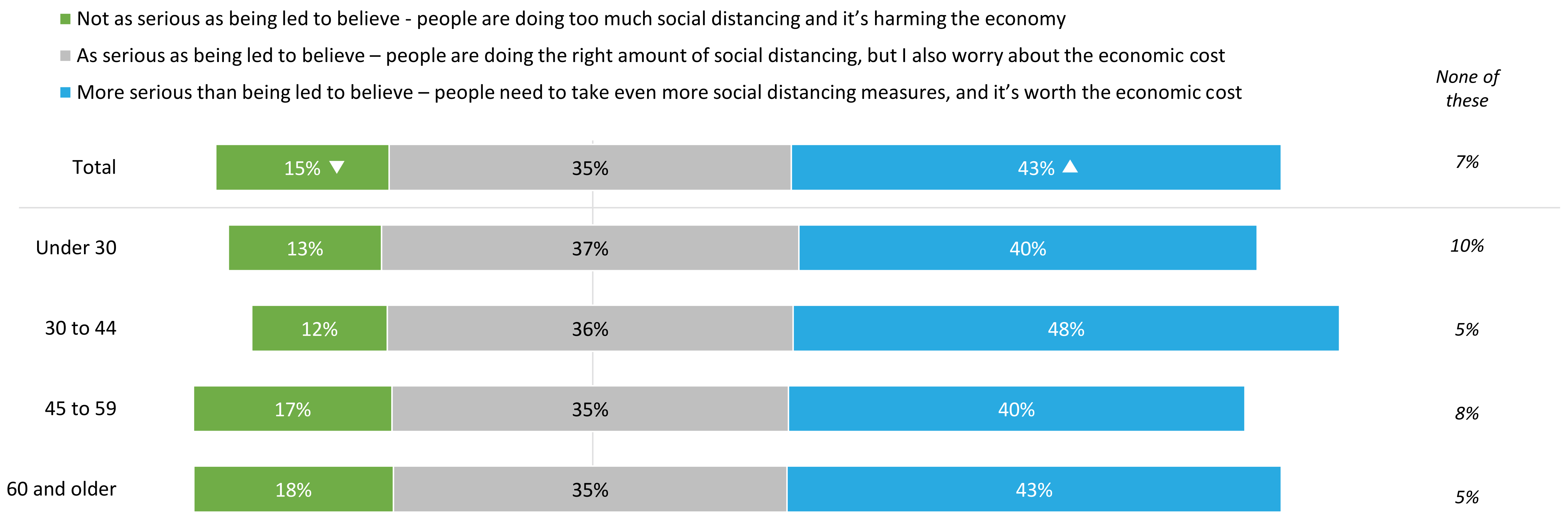
T2B (Extremely/Very Concerned)

	Total	Under 30	30 to 44	45 to 59	60 and older
Your own/your immediate family's economic well-being	**66%**	65%	70%	65%	65%
The economic well-being of your family and friends	**65%**	62%	68%	66%	65%
The health of your community's economy	**62%**	**54%**	**66%**	**64%**	**65%**
The health of the US economy	**73%**	**62%**	**73%**	**73%**	**81%**
The health of the global economy	**64%**	**56%**	**69%**	64%	**68%**

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

Accompanying higher overall concern levels, more Americans this wave believe the pandemic is actually worse than we are being led to believe.

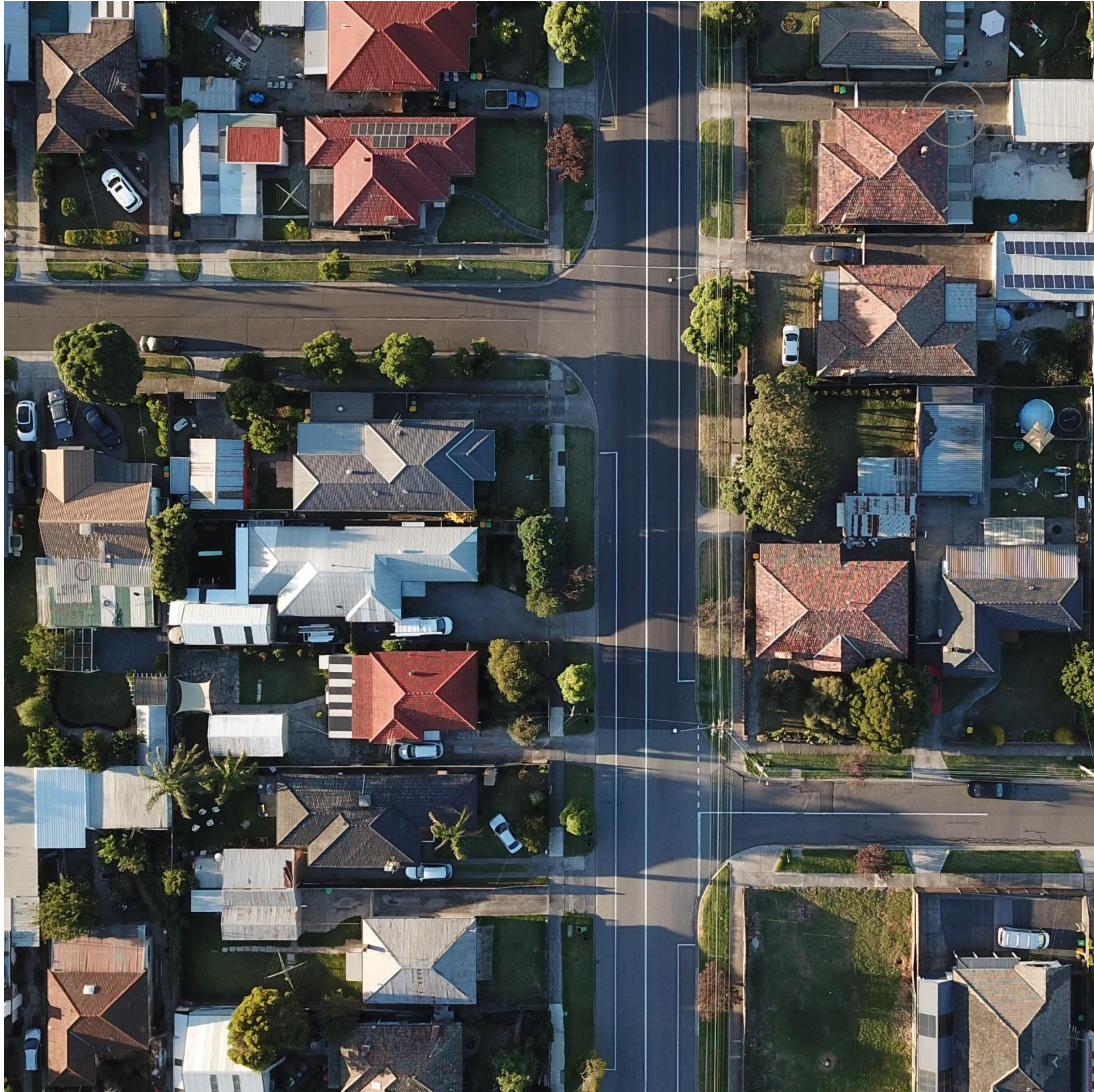
Coronavirus/Covid-19 Perceived Severity



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

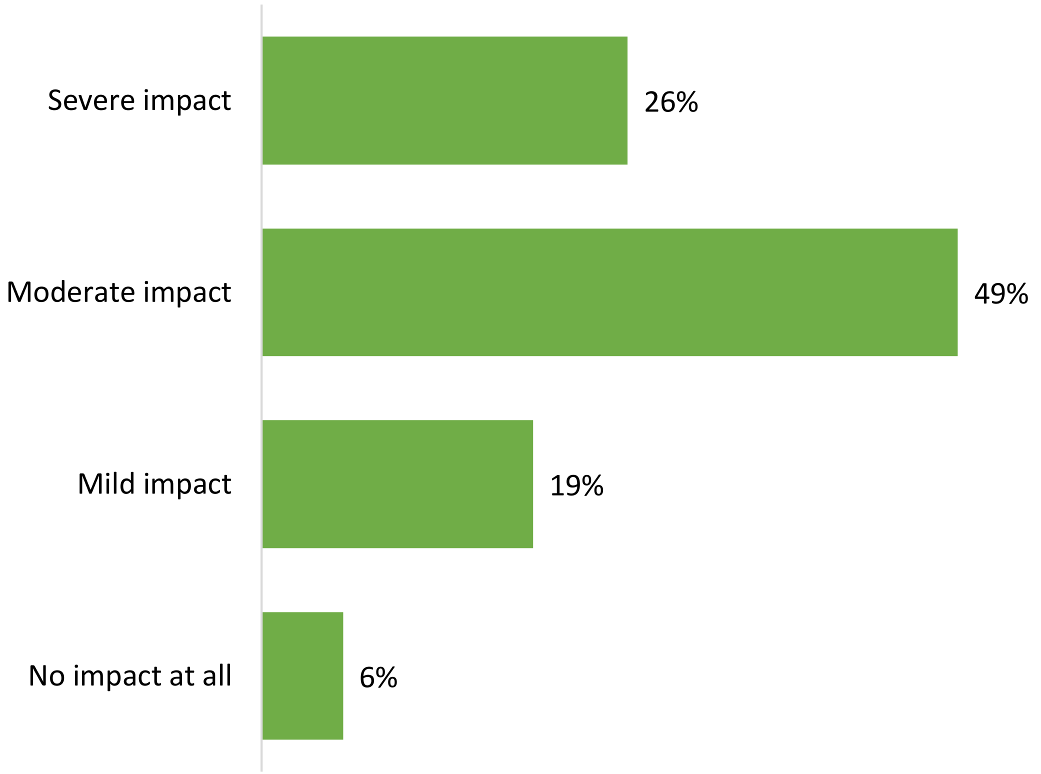
Impact on Daily Life

- Overall Impact
- Behavioral Reactions



More than four out of five Americans have been affected by the Covid-19 pandemic in a severe or moderate way. Disruptions are perceived to be more severe among younger Americans and those in more affluent households. Northeasterners and Westerners also report higher rates of disruption than those in the South and Midwest.

Coronavirus/Covid-19 Impact on Daily Life



	Under 30	30 to 44	45 to 59	60 or older
Severe	28%	30%	24%	21%
Severe or Moderate	78%	82%	75%	67%

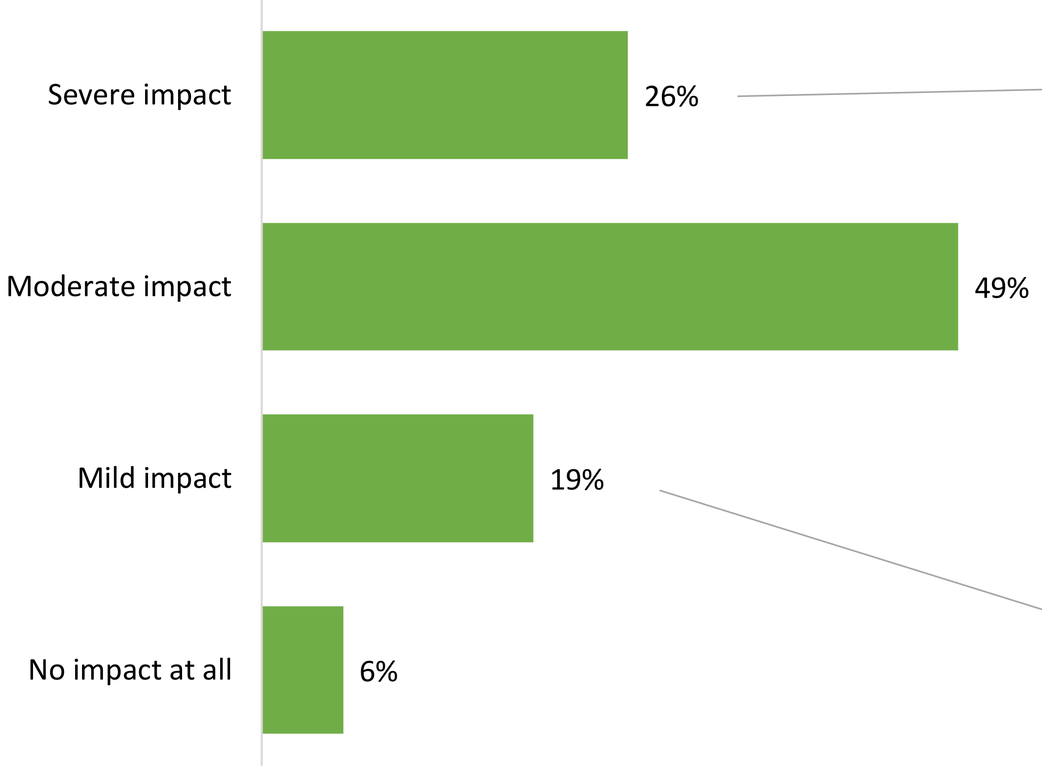
	Under $50K	$50K to $100K	$100K or more
Severe	24%	24%	31%
Severe or Moderate	69%	74%	84%

	Northeast	Midwest	South	West
Severe	33%	21%	25%	27%
Severe or Moderate	82%	75%	68%	81%

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

Health concerns, and in some cases even loss of friends and loved ones, are a significant driver of Covid-19-related distress. Those who say the pandemic has had a severe impact on their lives are also likely to mention extreme isolation and loss of formative experiences.

Coronavirus/Covid-19 Impact on Daily Life



"It will break us financially and we cannot access healthcare for the other reasons that we need to."

"I am at home now instead of at work. I am now trying to teach my own children at home plus provide distance learning for my students."

"…my business associate contracted the pandemic which eventually claimed his life, the financial strength of our company where he spear headed crumbled and my uncle is still battling with the same pandemic, but it's quite emotionally distressing because I have not been able to help physically/medically this time because of social distancing."

"My older daughter was sent home from college and will miss at least a year of living on campus. My younger daughter is a senior in high school and will miss all of the activities and events that go with that. Everything else can be replaced, eventually."

"I rarely leave my house, we have to sanitize everything, I have to buy more things online. I also cannot be near people nor my family elsewhere because I cannot travel."

"It pulled me from my clinical rotations in school and delayed my graduation. Also the job market has slowed and there are hiring freezes so I do not currently have a job lined up."

"Inability to find products for personal care and appropriate healthy food."

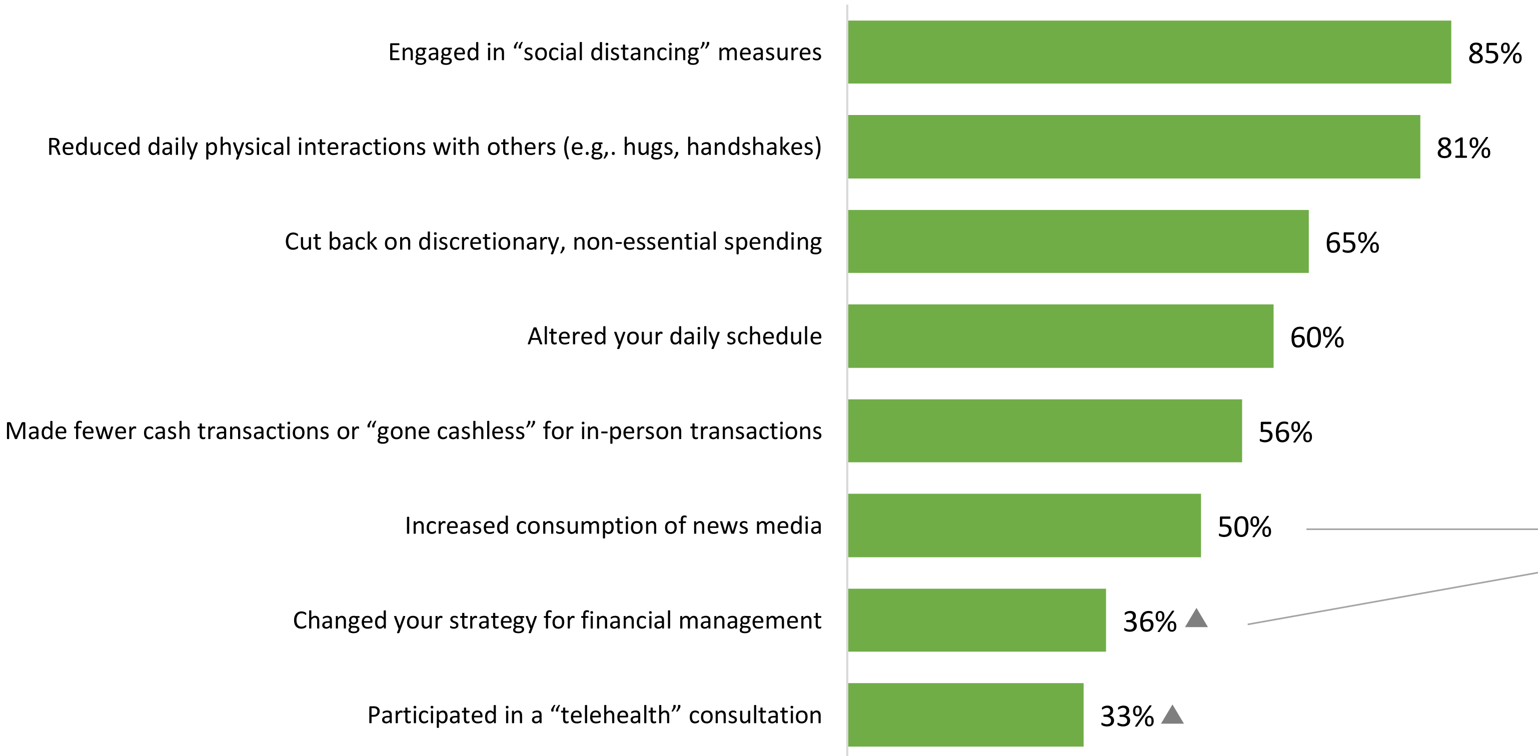
"I miss not being able to go to restaurants for dinner. Take out isn't the same."

"Loss of physical contact with friends and family. More time and effort spent shopping for groceries and such. I need new shoes and I can't go out to try any on."

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

Nearly nine in 10 Americans are still engaging in some form of social distancing. Americans also continue to reduce their discretionary spending and alter daily schedules to cope with the pandemic's evolving challenges.

Behavioral Changes due to Coronavirus/Covid-19*



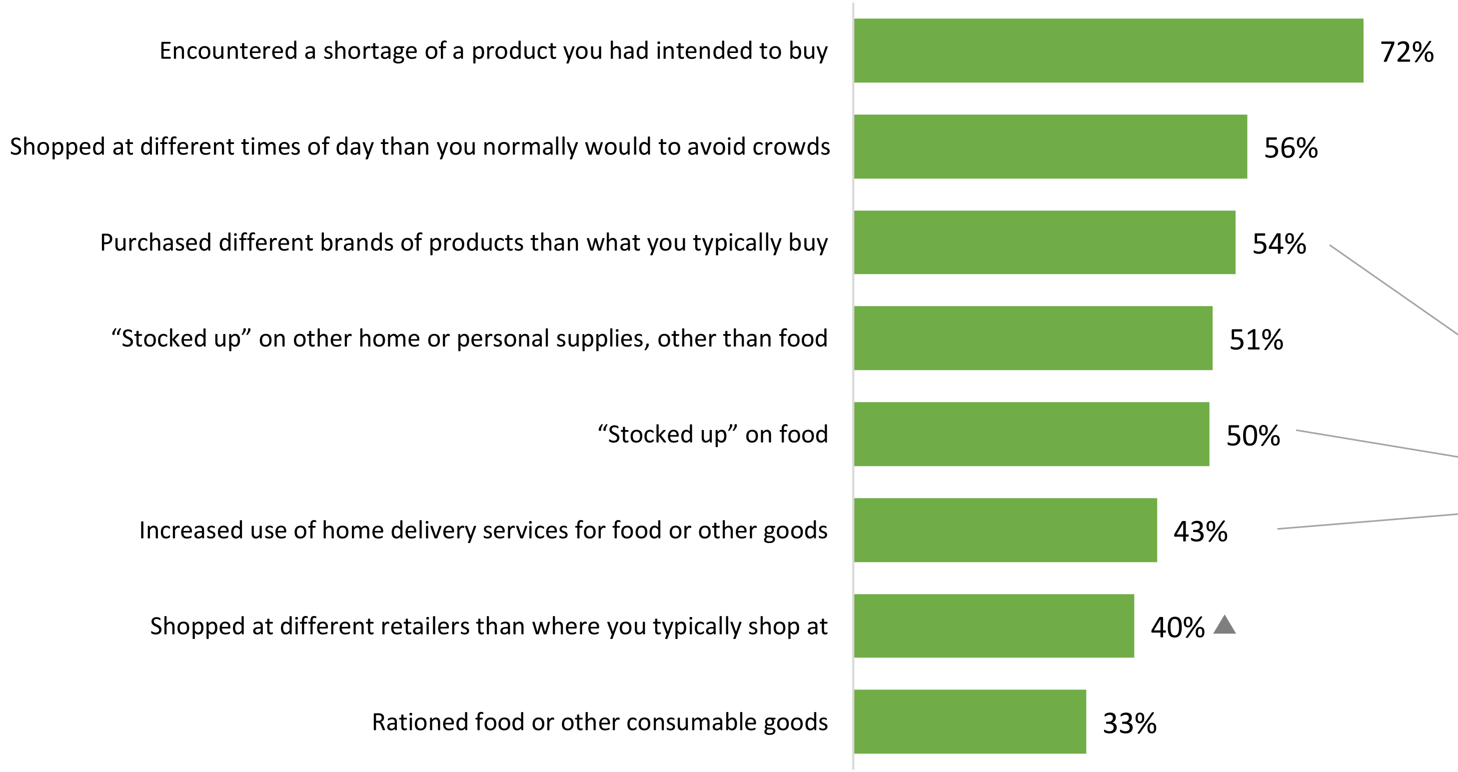
Higher income households ($100k+/year) are more likely than lower-income households to:

- Increase consumption of news media (58%)
- Change strategy for financial management (44%)

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

At the end of this fifth month of the outbreak in the US, three-quarters of Americans still report encountering a product shortage within the past week as a result of the pandemic.

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



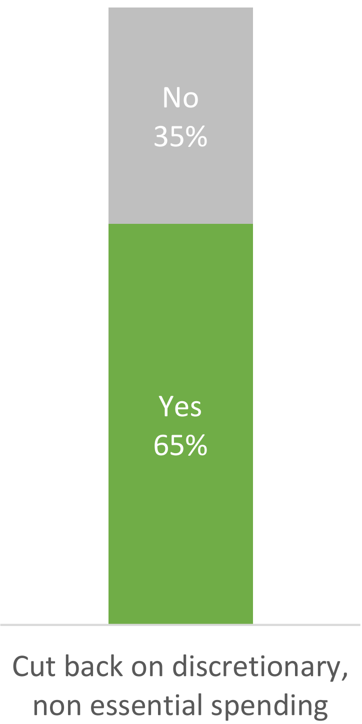
Higher income households ($100K+/year) are more likely than lower income households to:

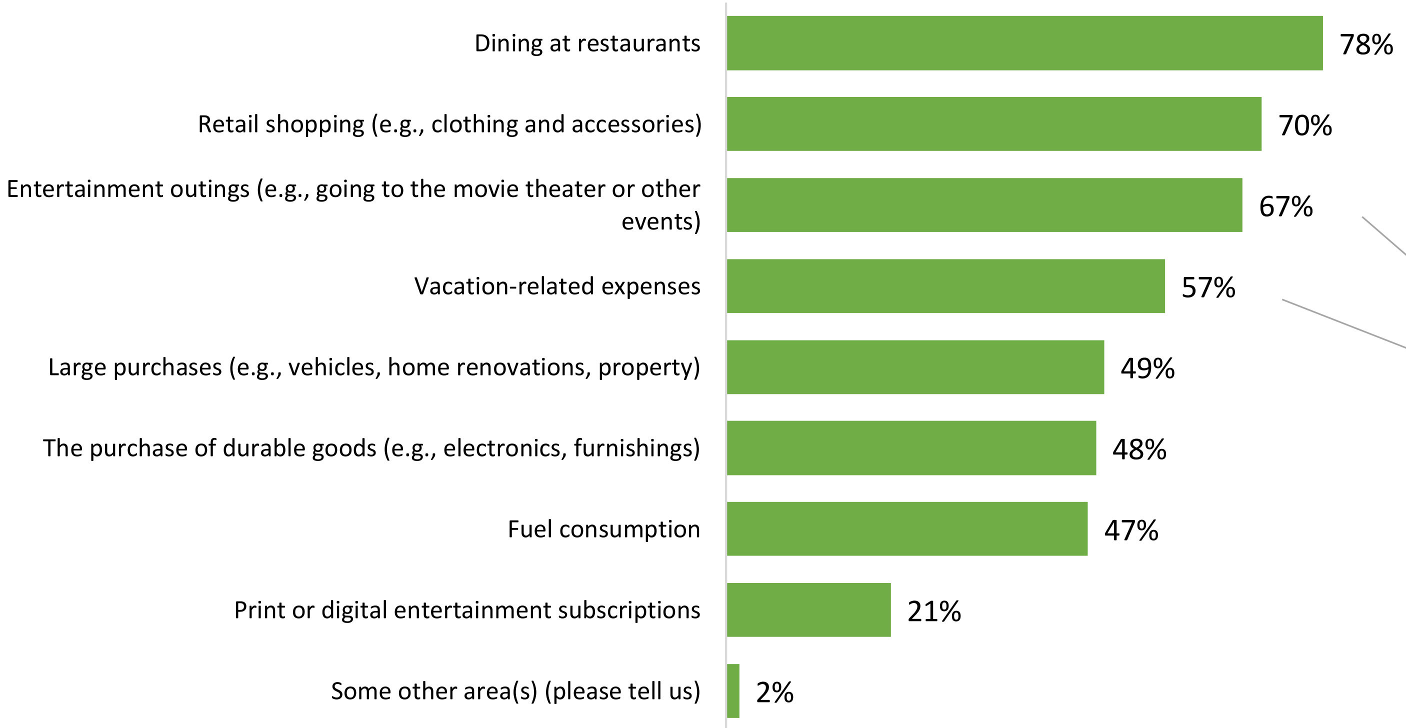
- Stock up on food (57%)
- Increase use of home delivery services (53%)
- Purchase different brands than normal (60%)

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

Of the 65 percent of Americans who say they've reduced spending within the past week as a result of the pandemic, most are cutting dining, shopping, and other entertainment outings. Nearly 60 percent are also cutting back on vacation spending.

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





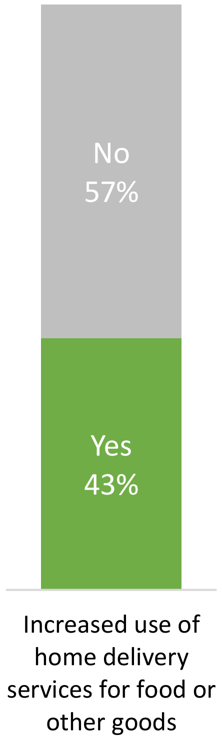
Higher income households ($100K+/year) are more likely to cut:

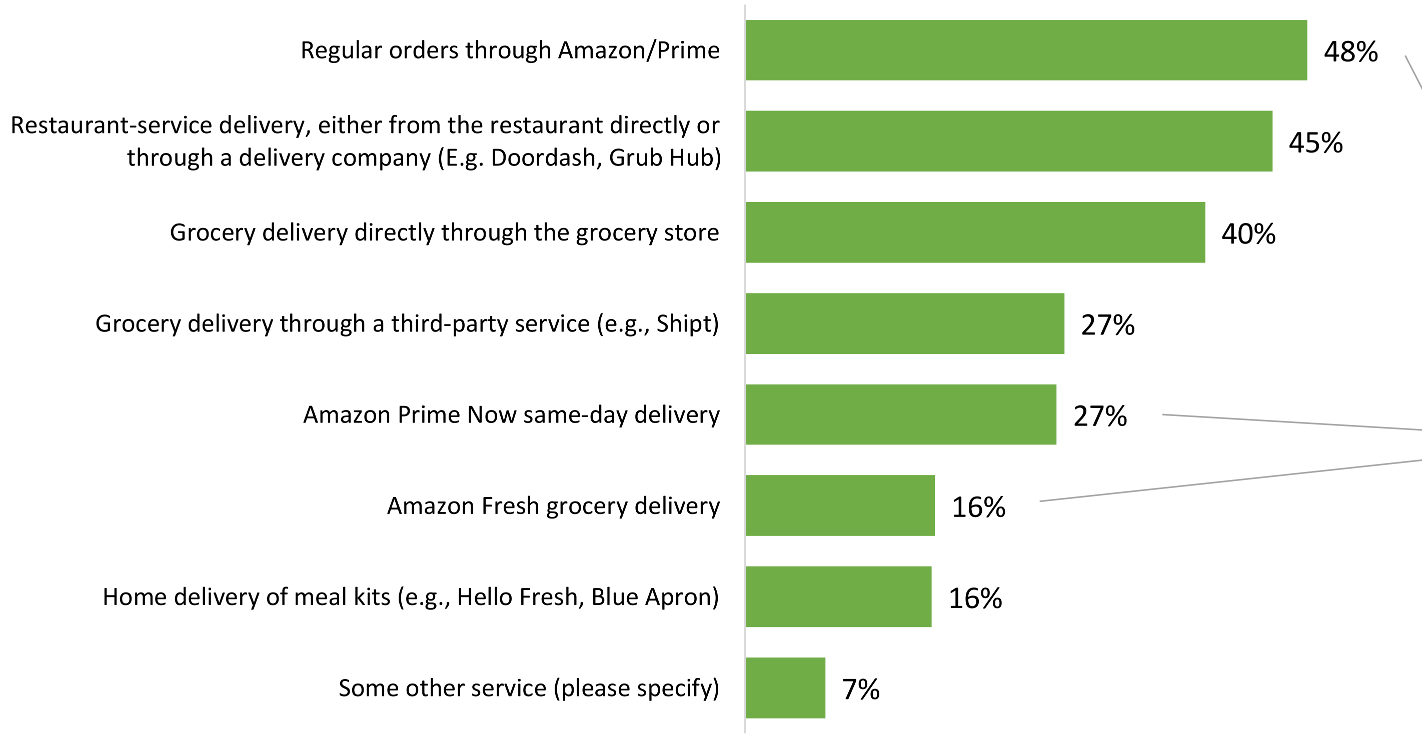
- Entertainment outings (74%)
- Vacation-related expenses (66%)

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)

As 40 percent of American consumers increase their use of home-delivery services, many services are seeing increased traffic, particularly Amazon prime, restaurant service delivery, and grocery delivery.

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





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

- Regular orders through Amazon Prime (57%)
- Amazon Prime Now Same Day Delivery (38%)
- Amazon Fresh (23%)

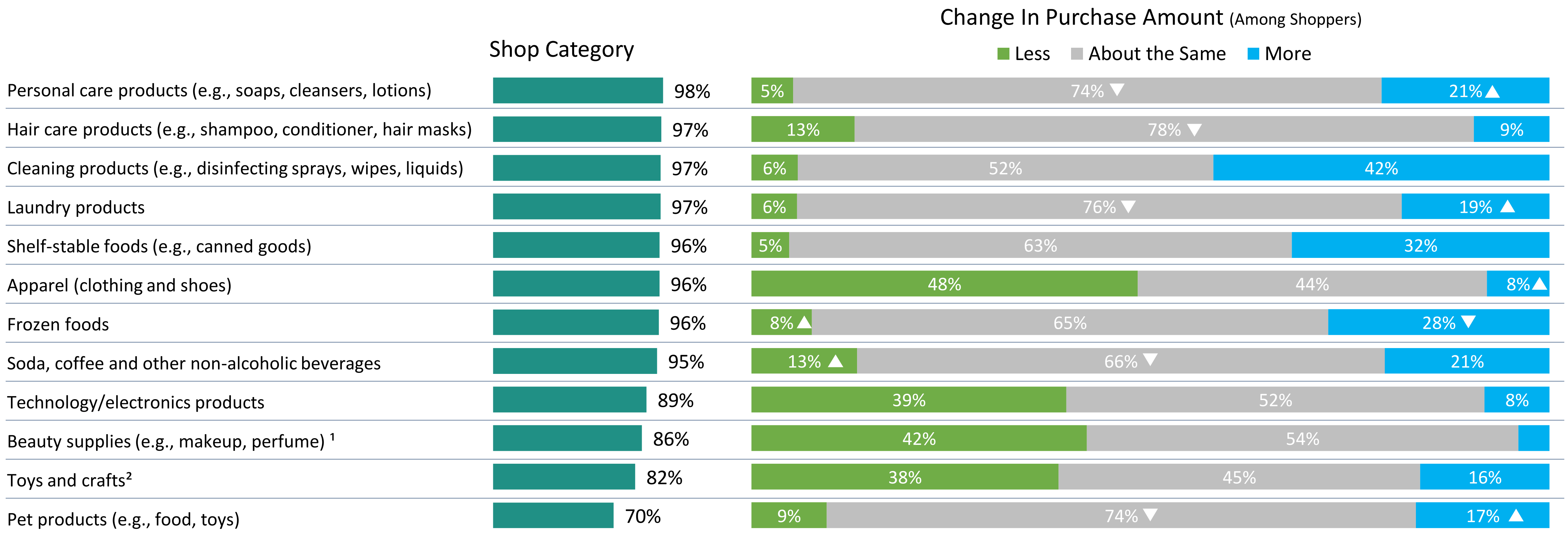
Q16 - You indicated that you have increased your use of home delivery services for food or other goods as a result of the Coronavirus/Covid-19 situation. Which of the following service are you using, either for the first time or more than you did before? Base: Covid-19 Aware who answered “Yes” to “Increased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

Changing Purchase Behaviors

- Category Purchase Volume
- Brand Loyalty

Durable goods (and luxury goods in particular) remain at risk for reduced purchase levels as American consumers search for areas to reduce spending. Nearly half of American shoppers are reducing their spending on apparel during the pandemic.

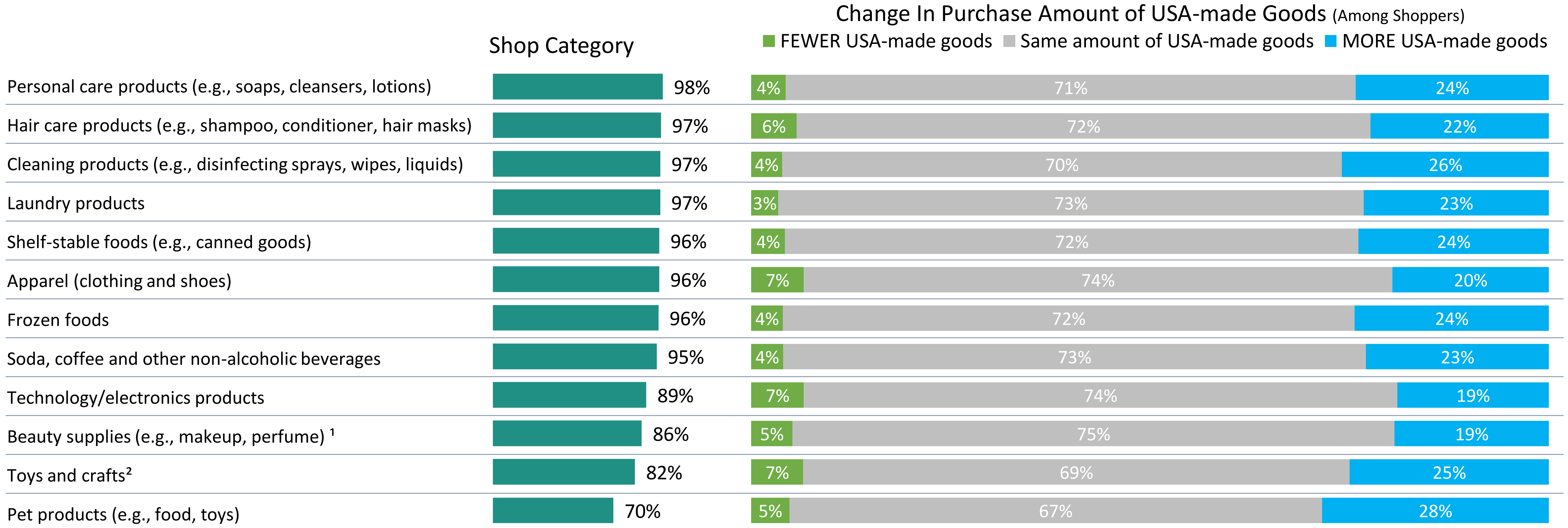
Coronavirus/Covid-19 Impact on Categories Shopped



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

New this week, American consumers were asked if the Covid-19 pandemic was having any impact on their decision or ability to purchase USA-made goods versus imported goods. Around 20-25 percent of shoppers across all categories say they're purchasing more USA-made products.

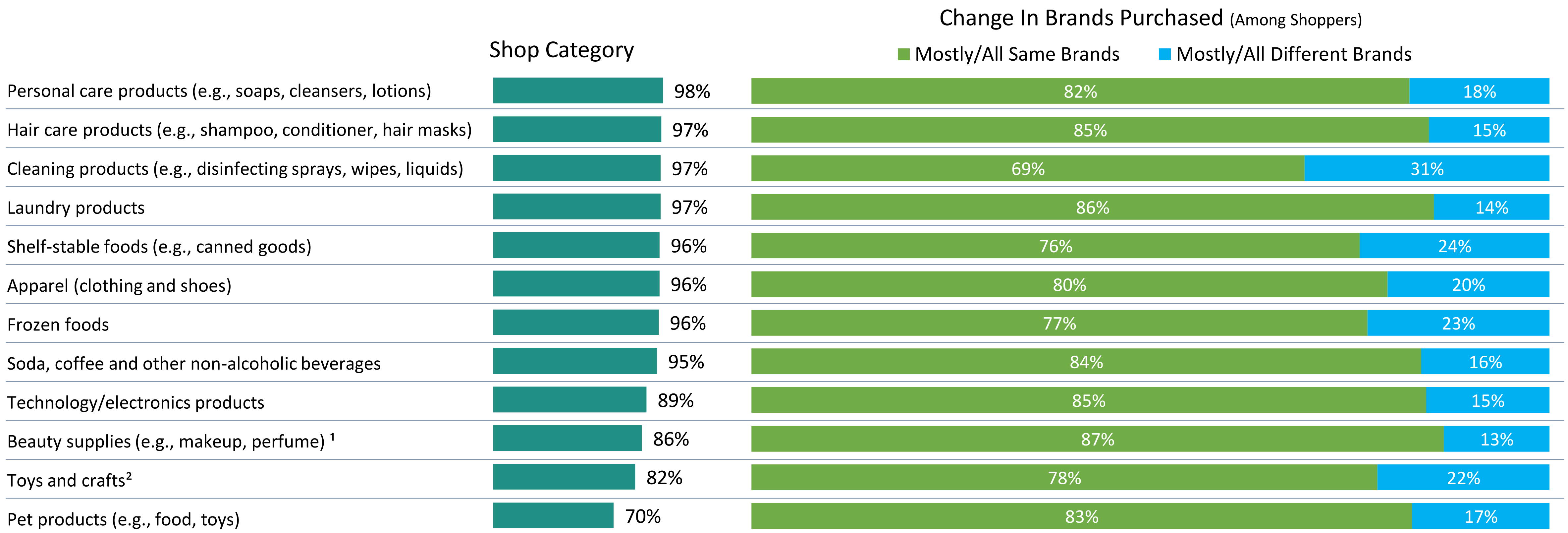
Coronavirus/Covid-19 Impact on Categories Shopped – Domestic versus Imported Goods



Q178c - Since the Coronavirus/COVID-19 situation began, have you purchased more, the same amount, or fewer USA-made goods (compared to before the outbreak) in each category? Base: Covid-19 Aware
[1]Only shown to females; [2]Only shown to those with children or grandchildren ages 0-17

A degree of brand-switching is present in each consumer category measured as shoppers face financial challenges and product shortages. Consistently, cleaning products have been among the most prone categories to brand-switching, along with frozen and shelf-stable 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

More than 60 percent of consumers who have switched brands of cleaning products say that product shortages (of their preferred brand/product) are a reason. Affordability is also a key driver of brand-switching across most categories.

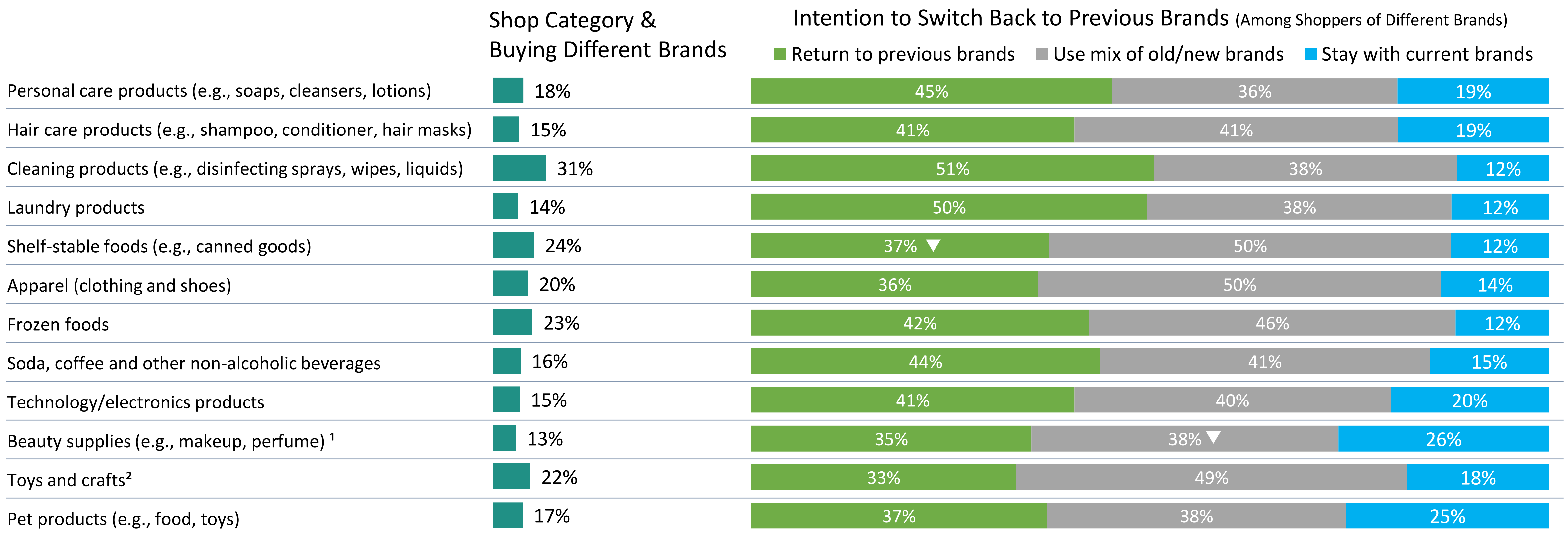
Coronavirus/Covid-19 Impact on Brands Purchased – Reasons for Buying All/Mostly Different Brands

	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 (e.g., soaps, cleansers, lotions)	18%	37%	34%	27%	22%	2%
Hair care products (e.g., shampoo, conditioner, hair masks)	15%	24%	39%	24%	26%	1%
Cleaning products (e.g., disinfecting sprays, wipes, liquids)	31%	61%	22%	16%	17%	2%
Laundry products	14%	37%	34%	31%	19%	0%
Shelf-stable foods (e.g., canned goods)	24%	44%	36%	28%	21% ▲	2%
Apparel (clothing and shoes)	20%	22%	38%	36%	17%	4%
Frozen foods	23%	39%	31%	31%	14%	3%
Soda, coffee and other non-alcoholic beverages	16%	28%	38%	37%	17%	2%
Technology/electronics products	15%	26%	35%	23%	29%	6%
Beauty supplies (e.g., makeup, perfume) [1]	13%	17%	43%	27%	13%	10%
Toys and crafts[2]	22%	26%	46%	36%	13%	4%
Pet products (e.g., food, toys)	17%	32% ▲	40%	26%	26%	2%

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

Across all categories measured, most consumers plan to use at least a mix of old and new brands once the pandemic slows. Brand-switching is most likely to have prolonged impacts in the beauty supply and pet product categories.

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



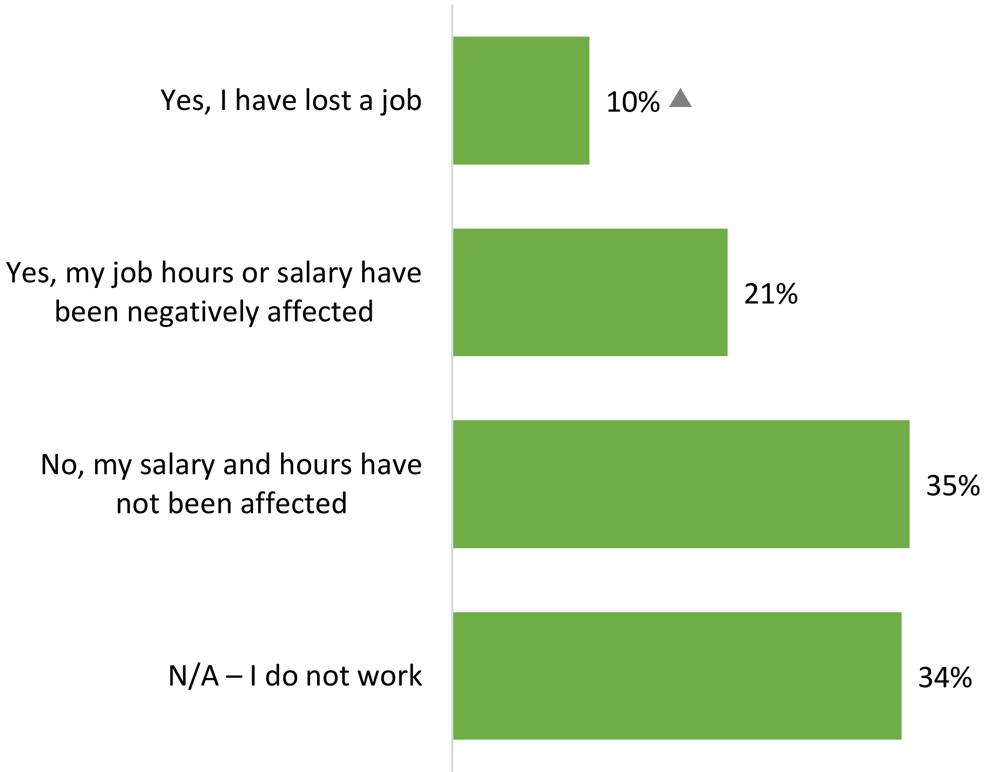
Q18b - And, for each of these categories in which you are buying different brands, once the pandemic's effects ease do you think that you will...[answer options]? Base: Covid-19 Aware Who Shop Category (Q17)
[1]Only shown to females; [2]Only shown to those with children or grandchildren ages 0-17

Employment Impact

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

The number of Americans reporting that the pandemic has cost them a job ticks up this wave to 10 percent. Currently, job impacts are highest in the nation's Western region.

Coronavirus/Covid-19 Impact on Employment



	Under 30	30 to 44	45 to 59	60 or older
Lost Job	15%	12%	11%	5%
Lost Job or Wages	41%	35%	35%	16%

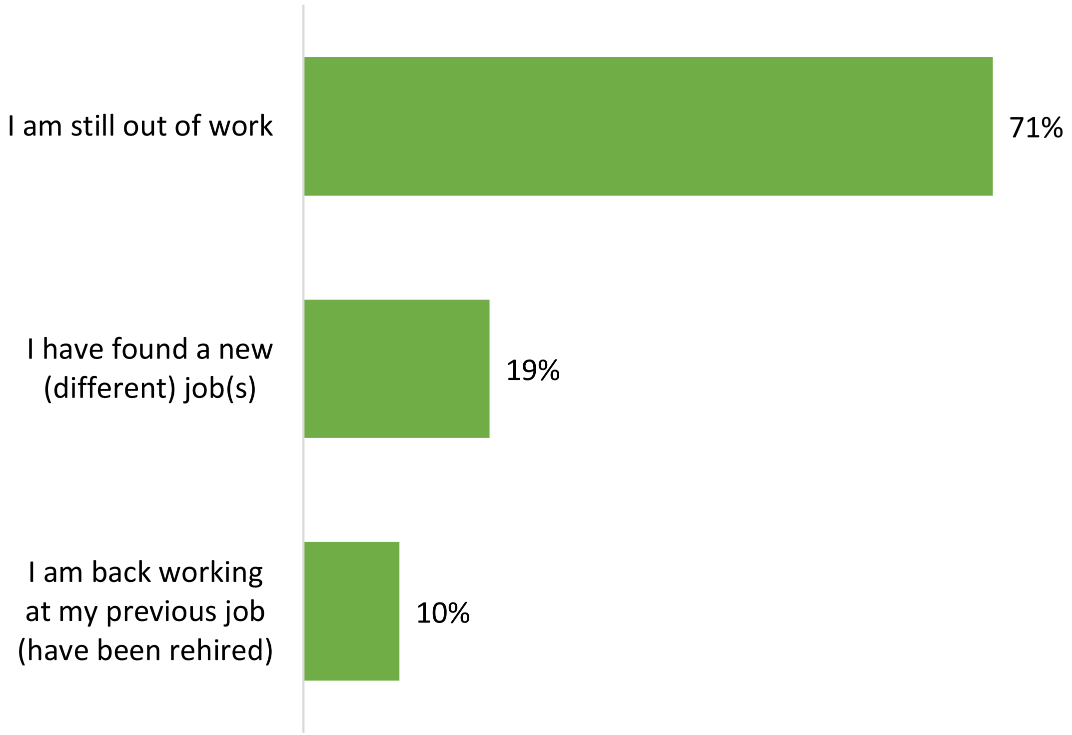
	Male	Female
Lost Job	10%	11%
Lost Job or Wages	33%	30%

	Northeast	Midwest	South	West
Lost Job	9%	9%	9%	15%
Lost Job or Wages	27%	27%	32%	38%

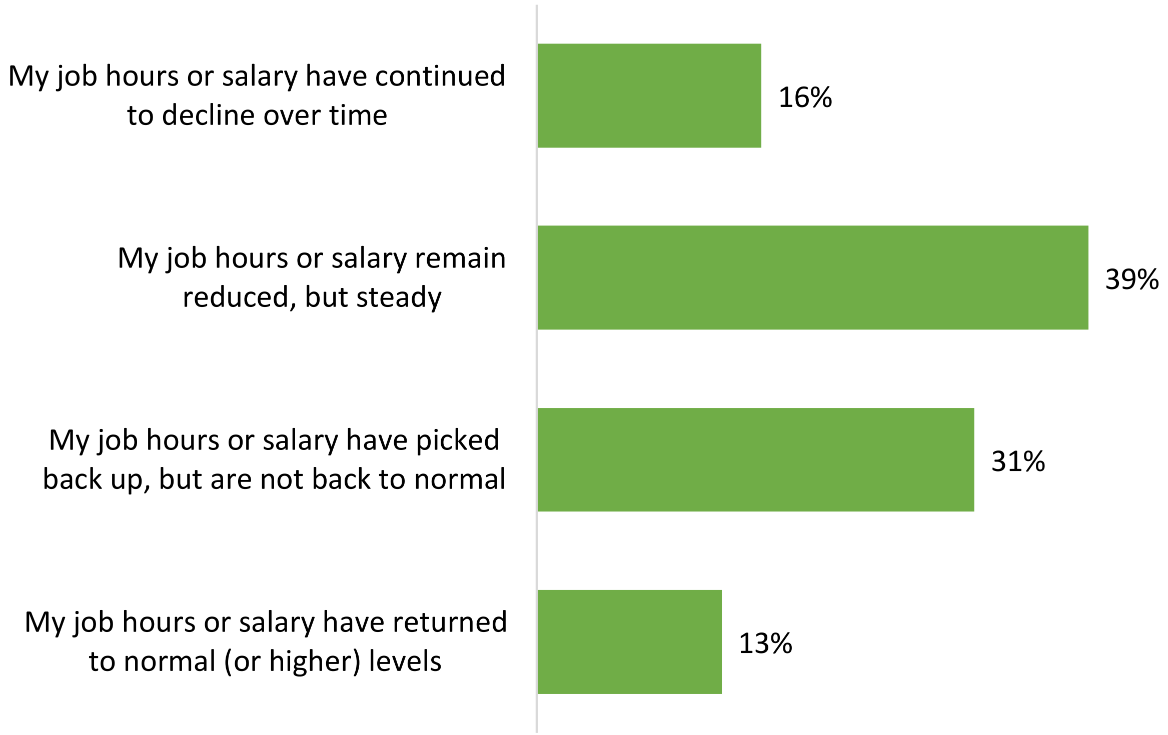
Q19 - At any point, did you lose a job or were your job hours or salary negatively affected by the Coronavirus/Covid-19 situation? Base: Covid-19 Aware

Seventy percent of those who have lost a job remain out of work, while just one in 10 have returned to their previous job. Nearly nine in 10 of those who have seen some kind of negative impact on their hours, pay, or salary have not yet seen their pay return to normal.

Employment Recovery Among Those Who Lost Job



Employment Recovery Among Those With Reduced Hours/Salary



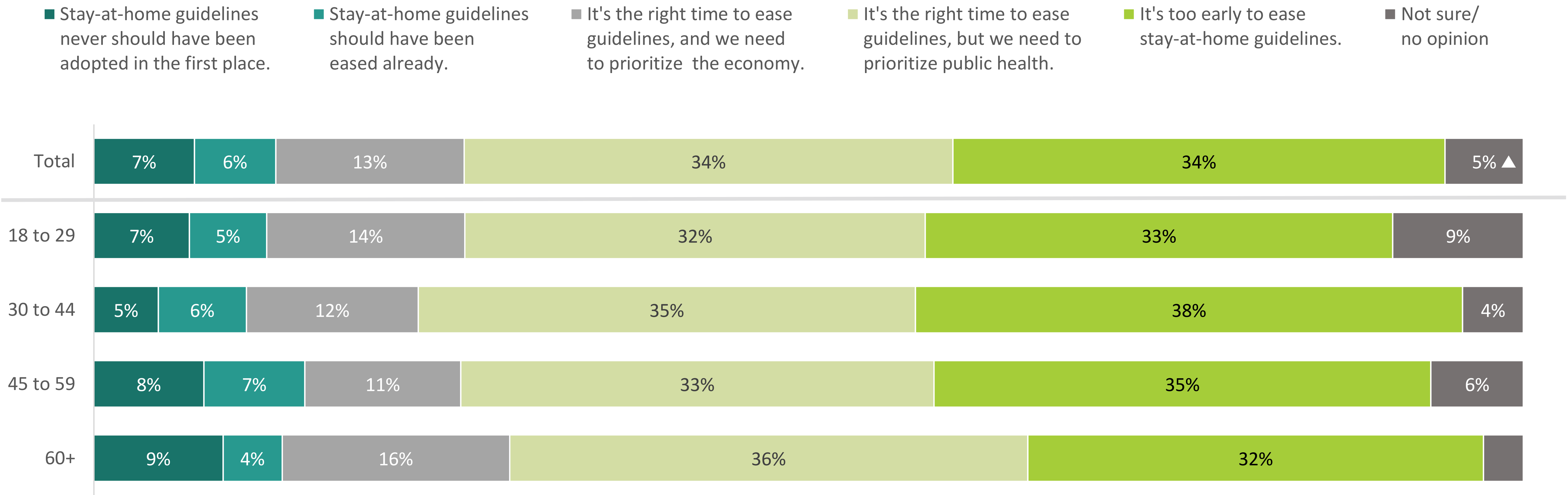
Q19a - You indicated that you have lost a job due to the Coronavirus/Covid-19 situation. Which statement below best describes your current situation regarding that job loss? Base: Covid-19 Aware and had lost job
Q19b - You indicated that your job hours or salary were negatively affected by the Coronavirus/Covid-19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

Despite the increase in concern levels, Americans' perception of the best path forward regarding "reopening" is relatively the same as in previous waves: about one-third believe it's too early to reopen and another third only support reopening businesses if health is the top priority.

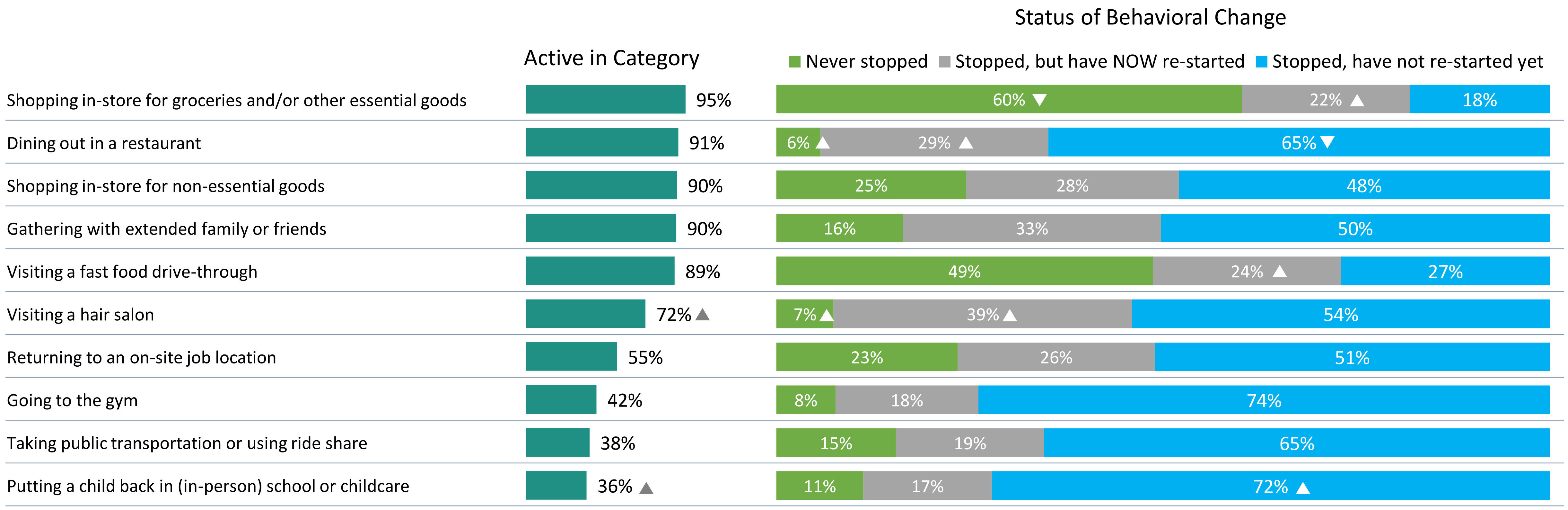
Perceptions of "Reopening"



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

Among those activities that were stopped or suspended due to the pandemic, the most likely to have been restarted are: visiting a hair salon, gathering with friends or family, dining out, and shopping in-store.

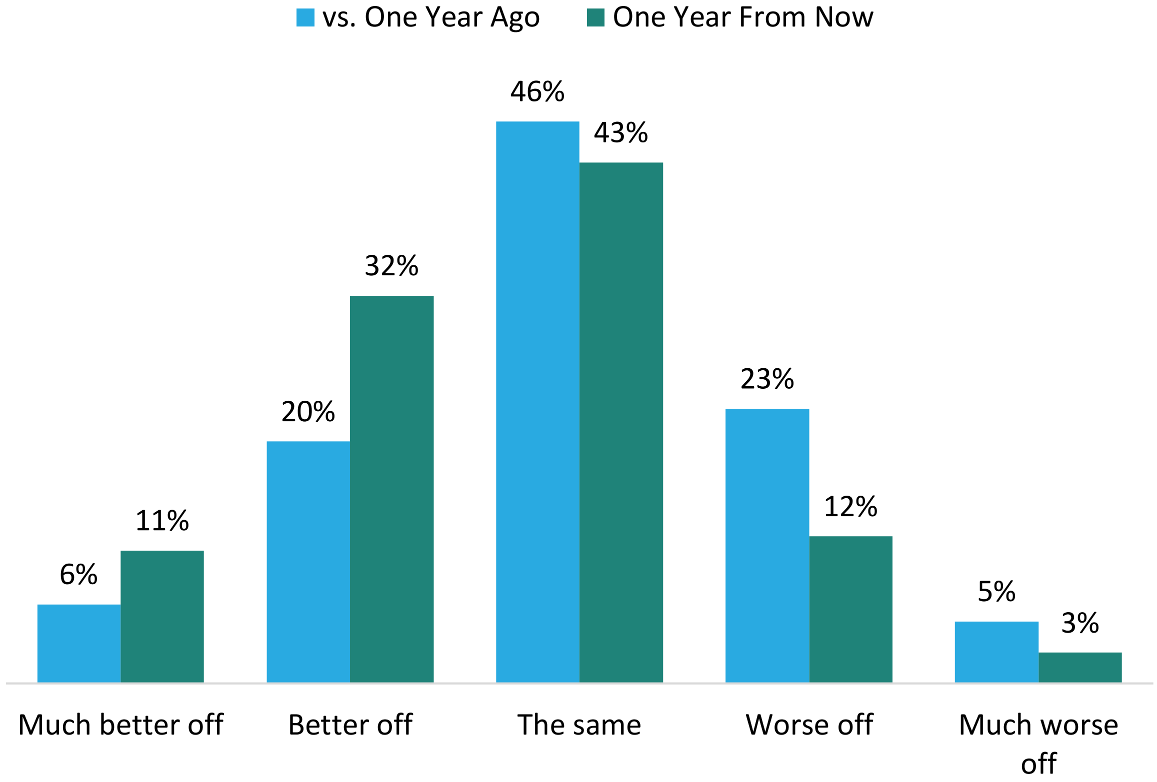
Behavioral Change as Communities Reopen



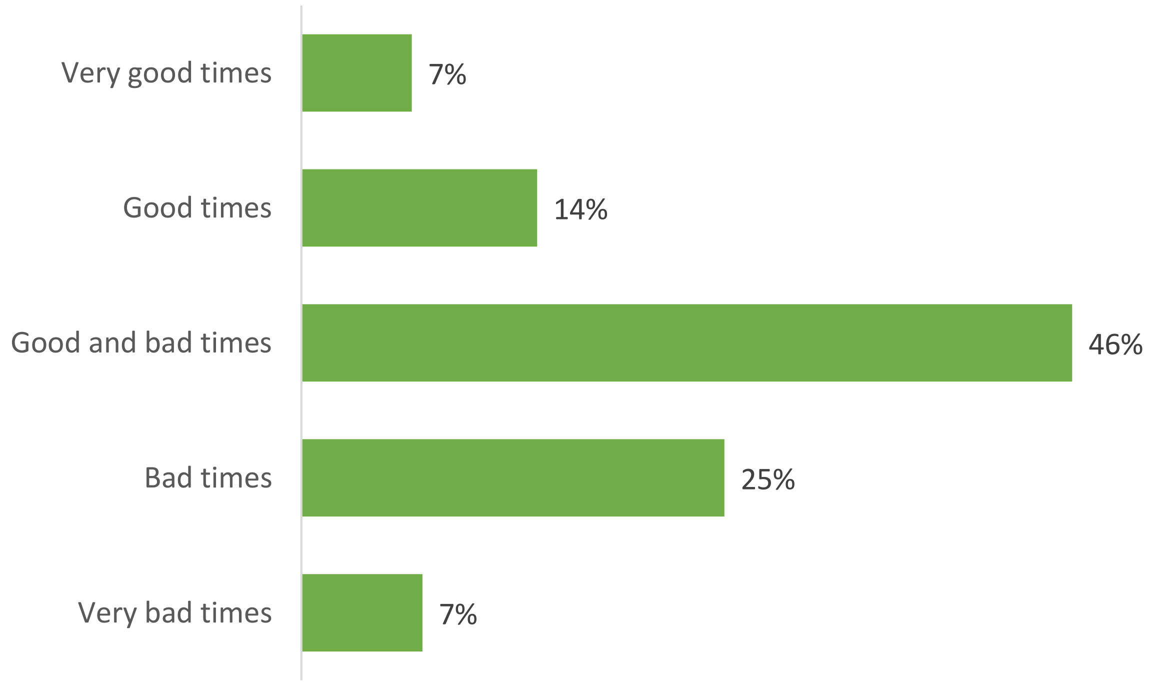
Q35 - As communities reopen, we are interested in understanding how people's behaviors may be changing. For each activity below, please indicate if you never stopped engaging in the behavior due to Covid-19, you stopped due to Covid-19 and have not re-started, you stopped but now have started engaging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

As has been the case since the tracker's beginning, most Americans remain cautiously optimistic about their own financial future despite the increase in concern over the Covid-19 pandemic. Only 15 percent expect to be worse off one year from now. The vast majority expect a mixed future for US businesses.

Personal Financial State vs. One Year Ago, From Now



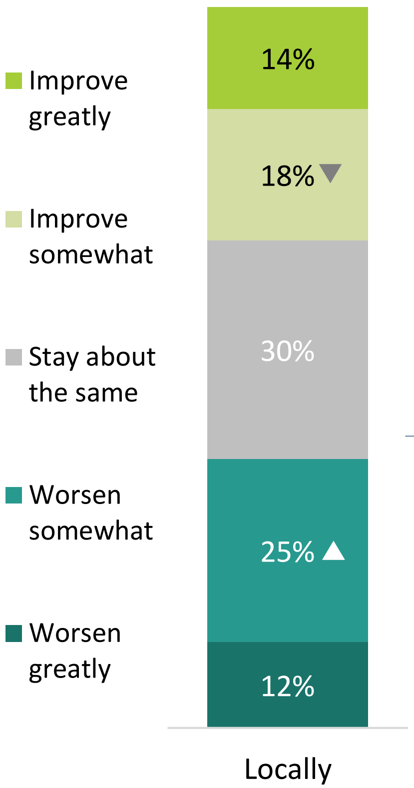
US Business Financial State Over Next 12 Months



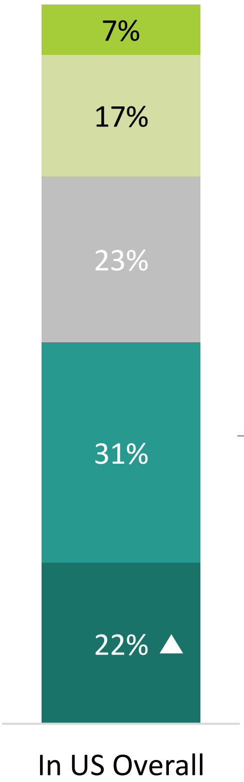
Q2 - Would you say that you/your family are better or worse off financially than you were a year ago? / Q3 - Now looking to the future: Do you think one year from now you/your family will be better or worse off than you are today? / Q4 - Now thinking about business conditions in general in the US: Do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

With the increase in concern about the Covid-19 pandemic, the 30-day outlook turns more pessimistic at the local, national, and global levels. More Americans expect the situation to worsen over the next 30 days than to improve.

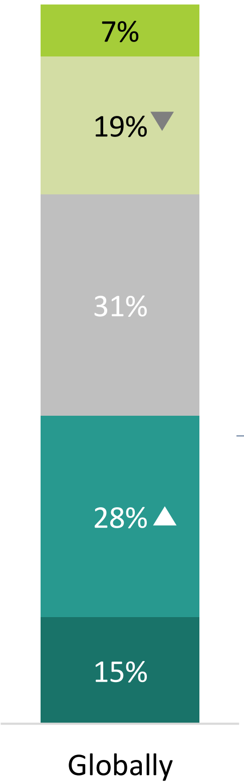
Anticipated Change to Coronavirus/Covid-19 Situation in Next 30 Day



	Worsen	Improve
Under 30	32%	35%
30 to 44	37%	36%
45 to 59	42%	27%
60 and older	38%	32%
Northeast	21%	49%
Midwest	36%	31%
South	42%	29%
West	43%	26%



	Worsen	Improve
Under 30	46%	26%
30 to 44	52%	28%
45 to 59	54%	23%
60 and older	58%	19%
Northeast	48%	31%
Midwest	53%	23%
South	53%	23%
West	56%	21%



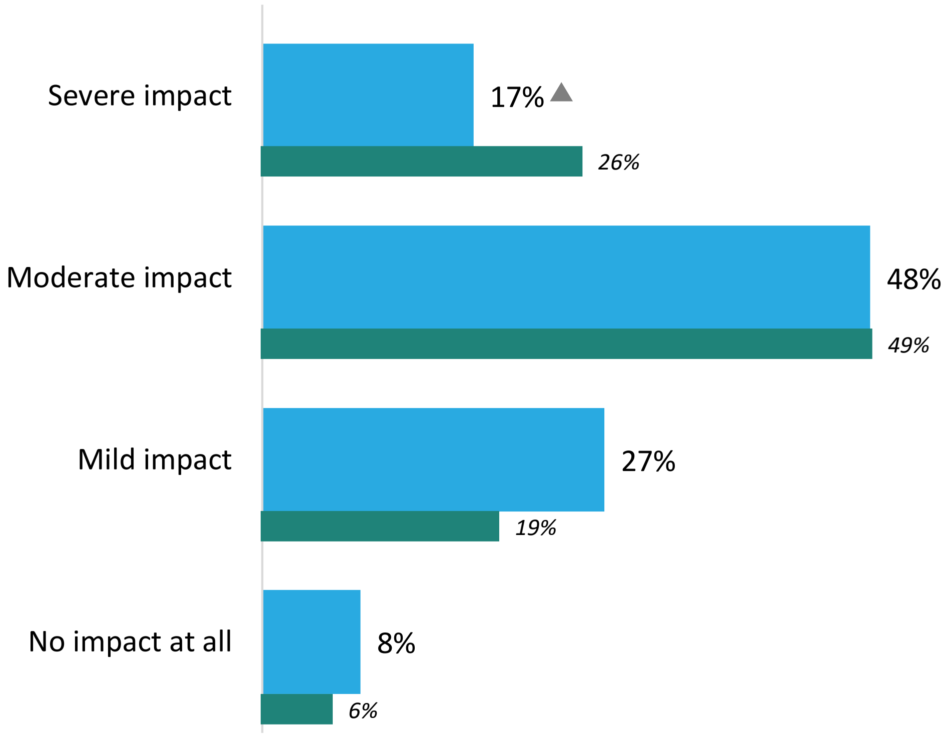
	Worsen	Improve
Under 30	37%	32%
30 to 44	38%	32%
45 to 59	48%	23%
60 and older	48%	20%
Northeast	36%	32%
Midwest	46%	23%
South	42%	28%
West	46%	22%

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

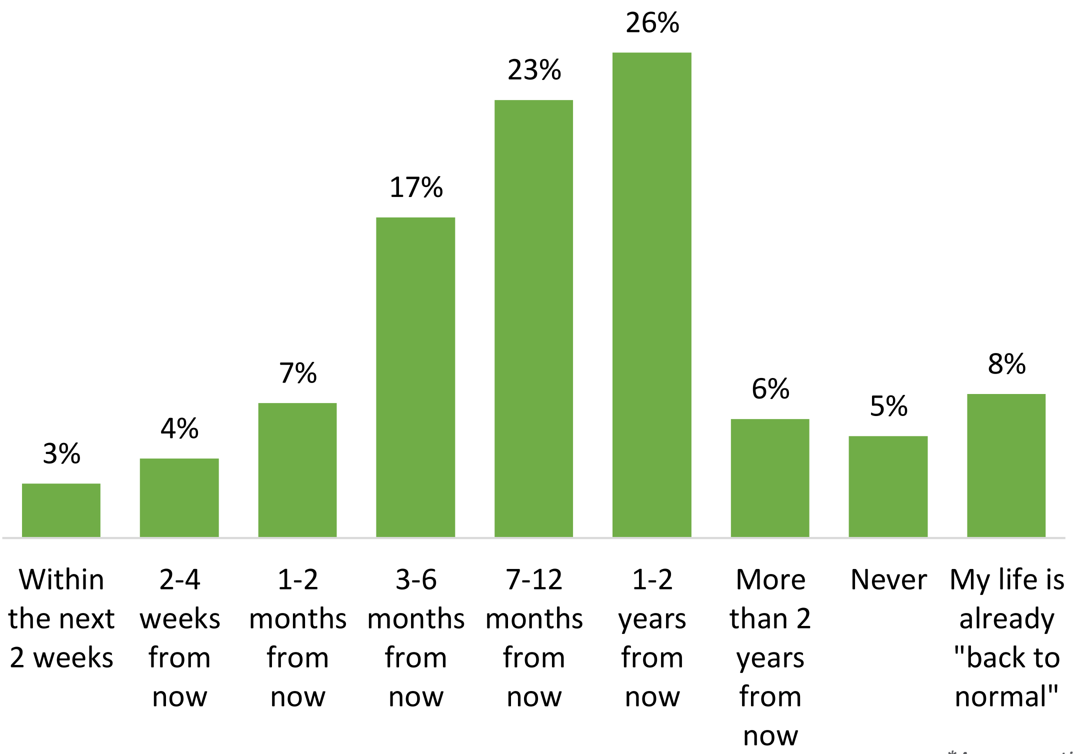
As cases and concern rise, more Americans this wave anticipate a severe impact from the outbreak in the next 30 days. Among those who feel the pandemic has disrupted their lives in some way, most expect that their lives will not return to normal for an average of 11 months.

Anticipated Impact on Daily Life in Next 30 Days

Compared to Reported Effect on Life to Date (Q11)



Anticipated "Back to Normal" Timeline



**Answer option added in W13*

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

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Questions?

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