# Covid-19 Pandemic Impact on US Consumers

W15 | July 23-24, 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 fifteenth wave of aytm's Covid-19 Consumer Tracker fielded Thursday, July 9 – Friday, July 10, 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.*

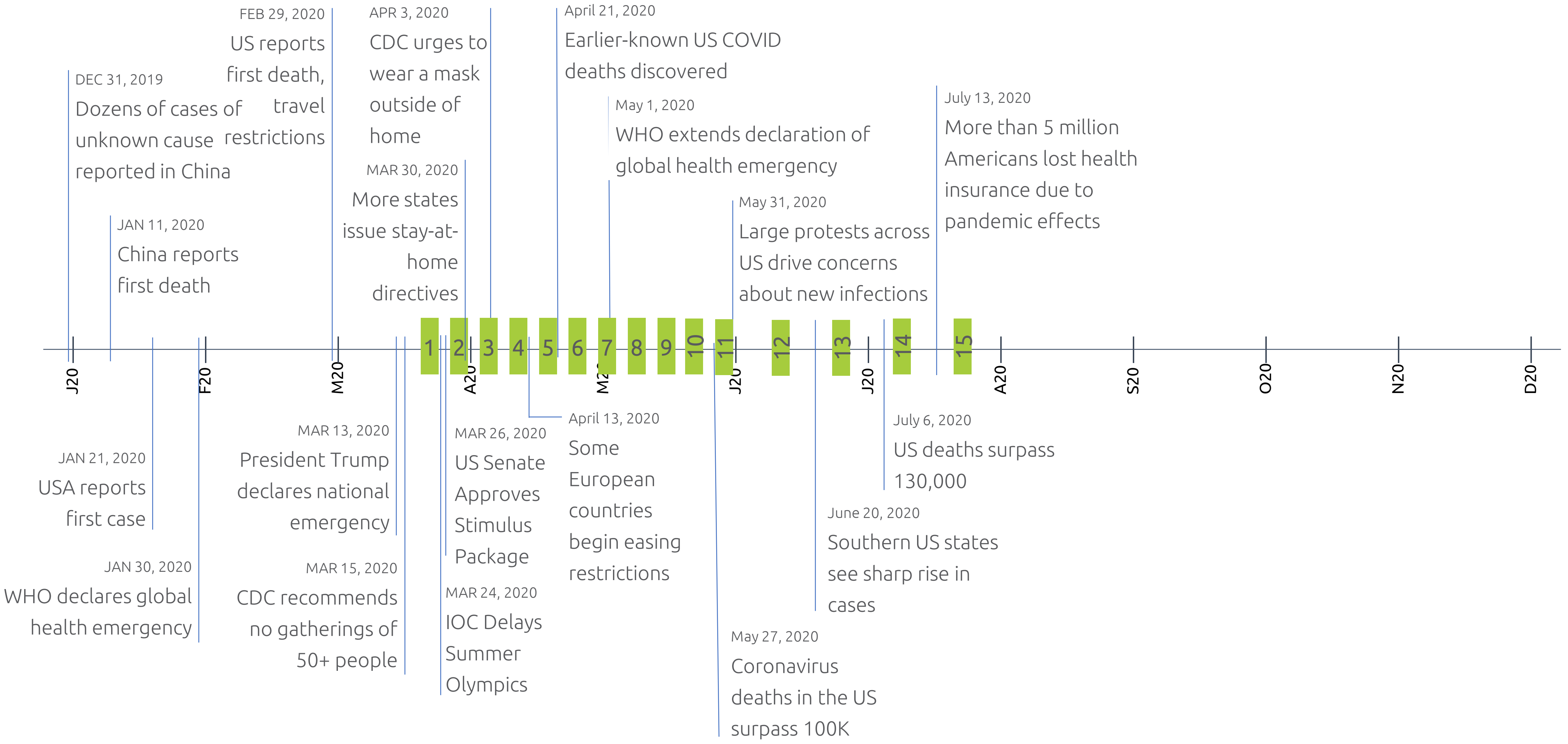
*All significance testing is conducted at 95% confidence level with the effective base used as the sample base for statistical calculations (Effective Base = 1,000 for Total sample).*

*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

**As case counts continue to rise, Concern remains elevated at levels seen during the first surge.**

Heading into late summer, the nation finds itself in the midst of a second severe wave of Covid-19 outbreaks, news consumption remains high, economic fears mount, and Americans rank the pandemic as the most pressing societal issue facing the country. Concern levels remain at elevated levels after spiking in the previous two waves. That increase follows a long, steady, and sustained decline from the highest concern levels, seen in early April.

- Health is at the core of pandemic-related stress for most individuals, unsurprisingly. Americans are fearful for the health of elderly relatives. Compounding the stress brought on by health concerns are economic anxieties over the future of the US economy.

**Enduring effects on daily life remain, and continue to evolve.**

In line with several previous waves, three-quarters of Americans have been severely or moderately affected by the pandemic. The pandemic's effects manifest in a multitude of ways, and those who say the crisis has had a severe impact on their lives indicate a growing number of personal, financial, and social stressors. Those who have been less impacted by the pandemic speak more to the inconveniences brought on by altered daily routines.

- About one in seven Americans continues to cut discretionary spending as consumers face an unclear financial future.
- Two-thirds or more of those looking to conserve outgoing cash are cutting back on dining, shopping, and entertainment outings.
- Consumers are showing no signs of returning to earlier spending levels in durable luxury goods like apparel, technology, toys and crafts, and beauty supplies. Conversely, pandemic spending continues to buoy increased shopping in supply and commodity categories.
- Americans continue to indicate the pandemic is driving them to explore alternative brands to what they may typically buy. As has been the case for several months, much of the brand-switching is driven by product shortages experienced at retail, but many shoppers are also just looking for more affordable products. Regardless of the primary reasons behind brand-switching, new brands that have achieved a foothold in consumer consideration sets are likely to endure (to some extent) beyond the pandemic.

**Americans continue to express unease with reopening, travel, and in-person classes.**

While Americans are slightly more optimistic about how the pandemic could unfold over the next thirty days in their local communities, those expecting the situation to get worse outnumber those anticipating improvements. Americans remain adamant that, in the long term, they'll be largely unaffected financially by the crisis, but immediate concerns persist. Despite large segments of businesses resuming activity over the past few weeks, nearly half of Americans say it's too early to reopen businesses at all. And, even as what would (under normal circumstances) be the height of summer travel season approaches, many Americans are still cutting vacation expenses and expressing discomfort with traveling in close proximity to others. Even more top of mind for parents are the accommodations that need to be made at summer's end for their children's education. Fewer parents support in-person classes this wave, showing how the uncertainty wrought by Covid-19 can cause sentiment to shift rapidly.

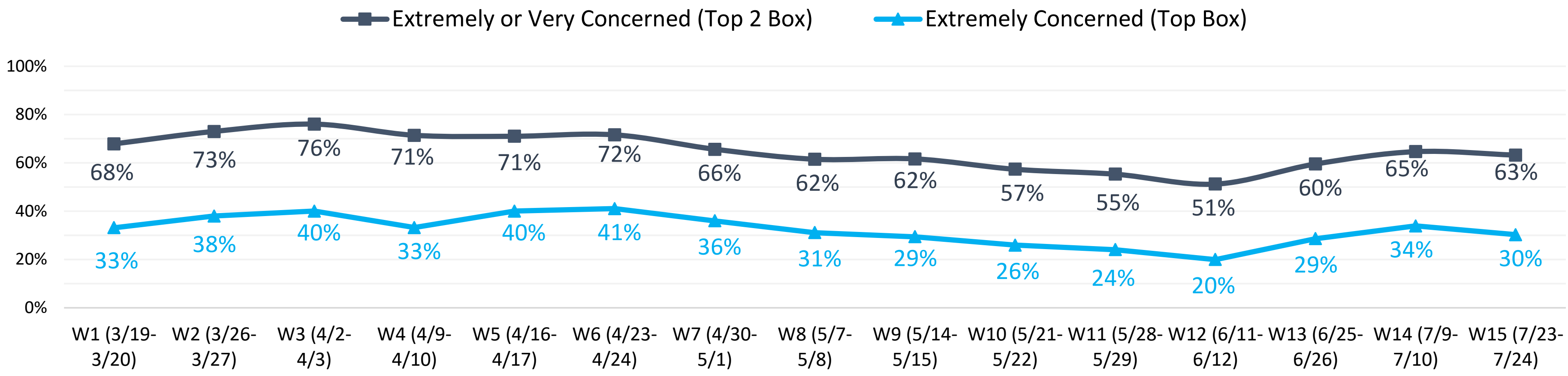
# Wave over Wave Trends

- 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

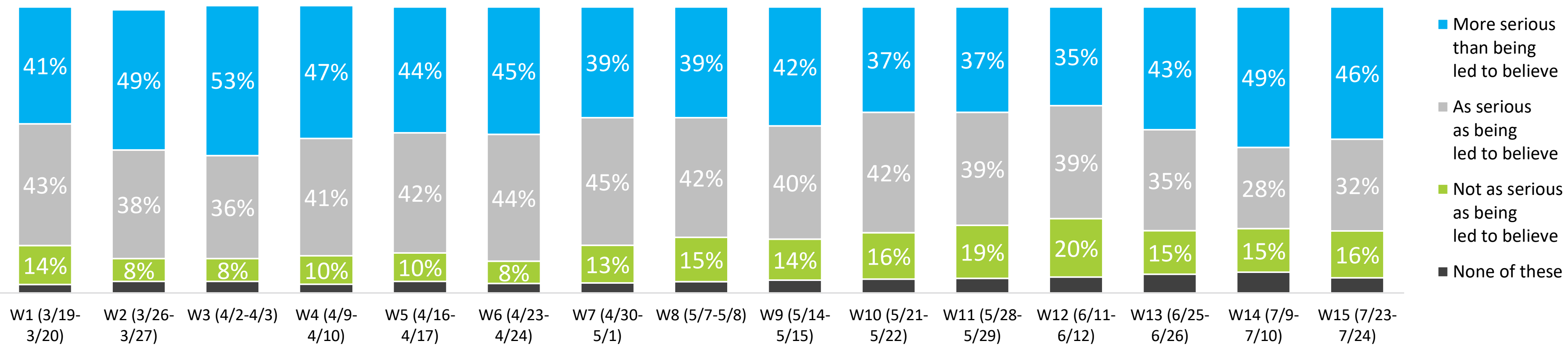
Pandemic concern levels are holding relatively steady after climbing throughout the past month.

## Coronavirus/Covid-19 Concern Level




Perceived severity remains elevated - half of Americans continue to feel the pandemic is actually more serious than is being represented.

## Coronavirus/Covid-19 Perceived Severity

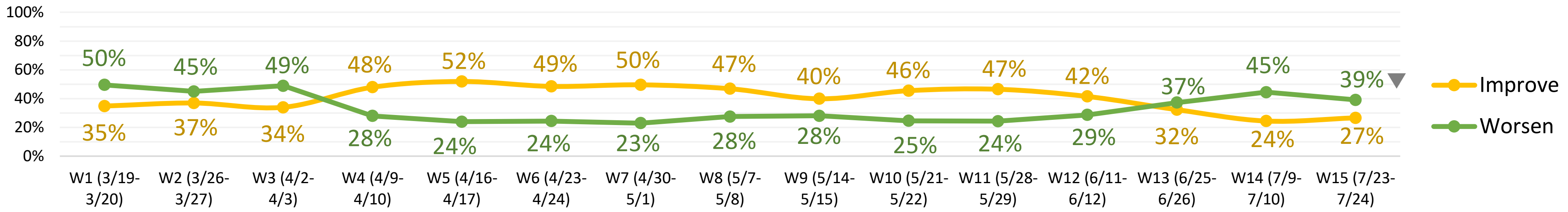



*Q7 - Overall, how would you characterize your current level of concern about the Coronavirus/Covid-19 situation? Base: Total*
*Q10 – Which statement below best describes your general perception of the Coronavirus/Covid-19 pandemic? Base: Total*

# Anticipated Change in Coronavirus/Covid-19 Situation

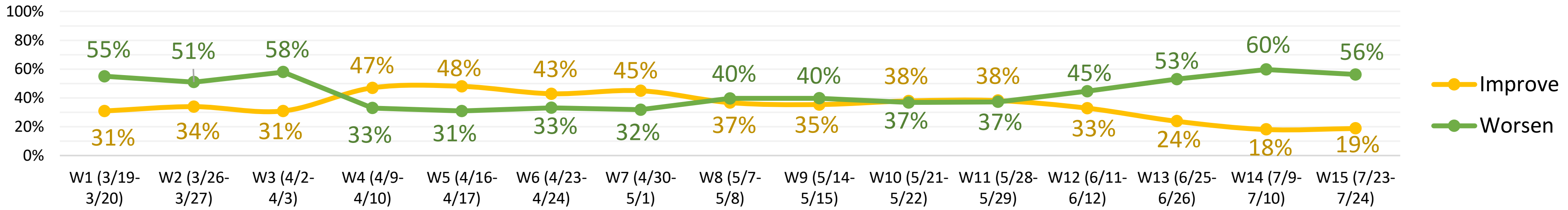
At the local level, a bias for optimism returns this wave as fewer Americans expect the pandemic to worsen over the next 30 days, although few expect improvements.

**Change Locally in Next 30 Days**



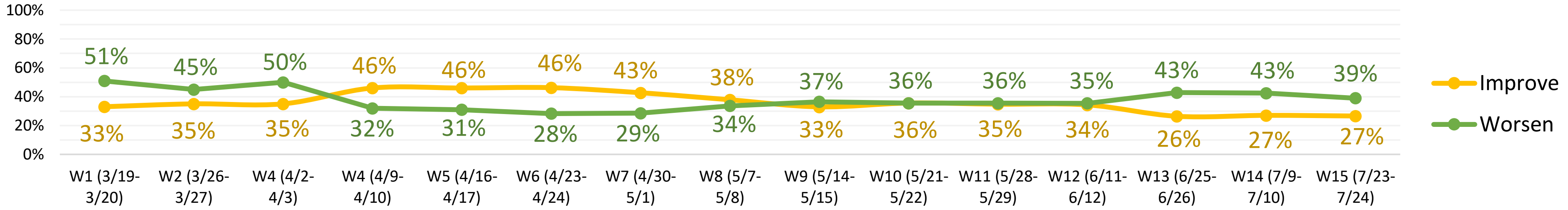

More than half of Americans expect the Covid-19 pandemic to worsen nationally over the next 30 days.

**Change in US Overall in Next 30 Days**




The global 30-day outlook continues to trend flat with about 40 percent expecting the situation to worsen.

**Change Globally in Next 30 Days**

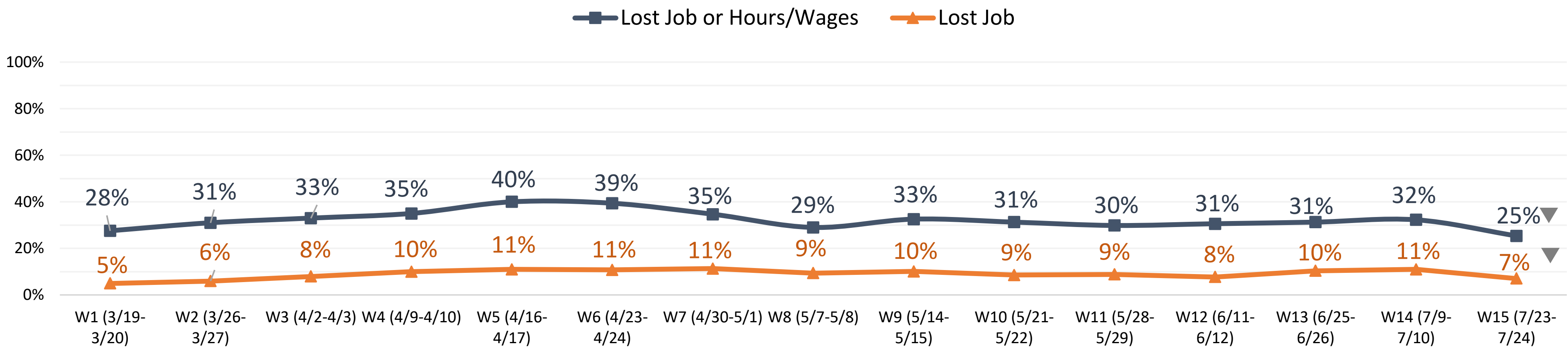



*Q22 - Thinking locally, about the US overall, and globally, how do you expect the Coronavirus/Covid-19 situation to change in the next 30 days? Base: Total*

# Employment, Financial Impact of Coronavirus/Covid-19

Reported employment impacts remain a troubling effect of the crisis, but fewer Americans are reporting a job lost to the pandemic this wave.

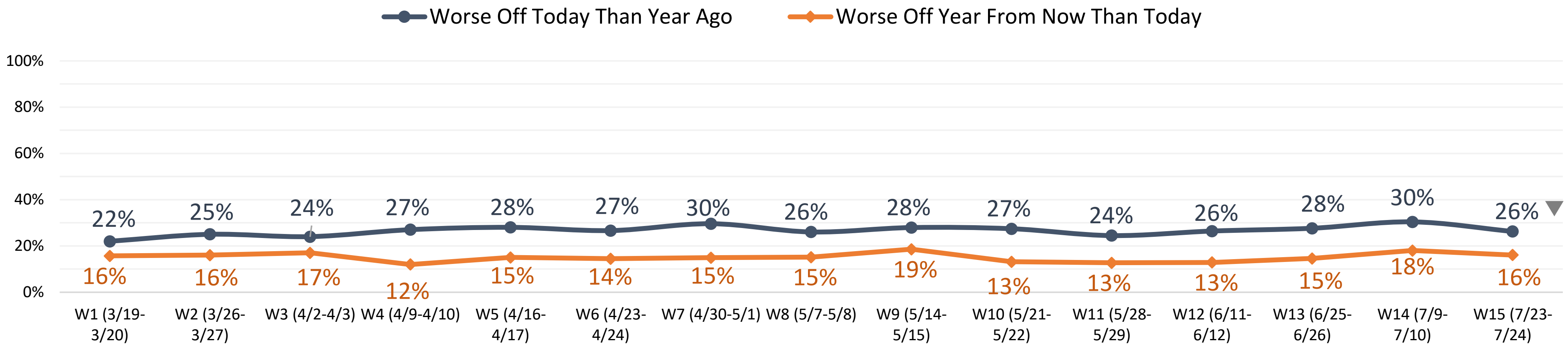
## Coronavirus/Covid-19 Impact on Employment




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

In line with several previous waves, Americans remain optimistic about their own financial outlook one year out – just 16 percent expect to be worse off than they are today.

## Personal Financial State vs. One Year Ago, From Now

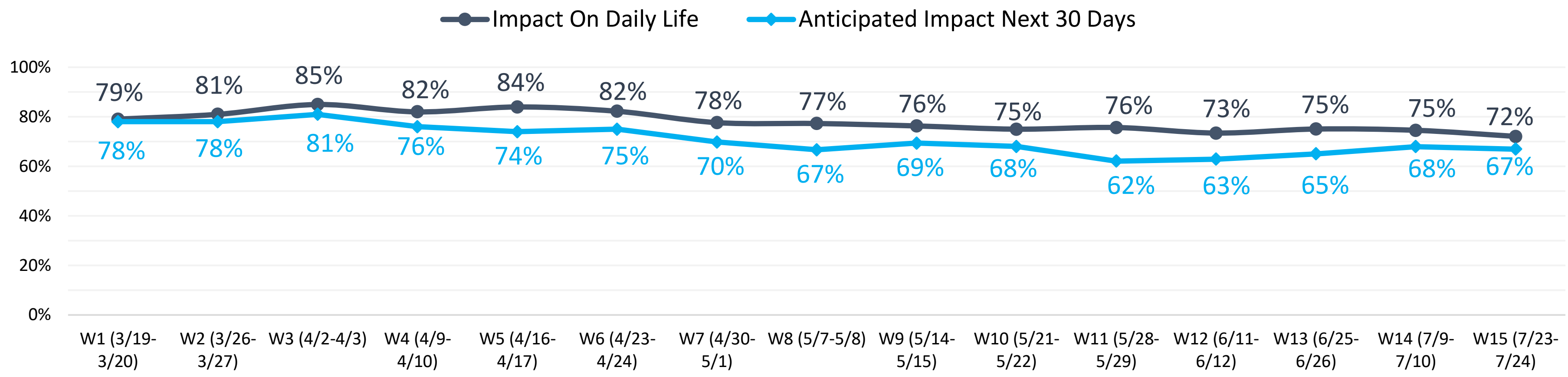



*Q19 - At any point, did you lose a job or were your job hours or salary negatively affected by the Coronavirus/Covid-19 situation? Base: Total | Q2 - Would you say that you/your family are better or worse off financially than you were a year ago? / Q3 - Now looking to the future: Do you think one year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

# Impact, Estimated Timeline of Coronavirus/Covid-19

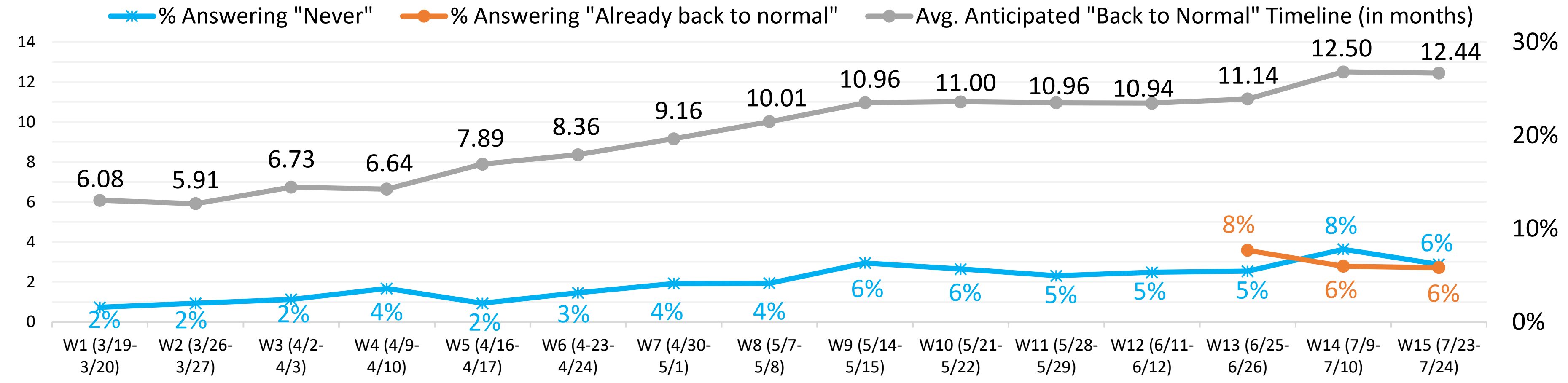
Reported impacts on daily life are relatively steady, but have trended down slowly since April.

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




On average, Americans don't expect their lives to return to normal for a little over one year.

## Anticipated "Back to Normal" Timeline



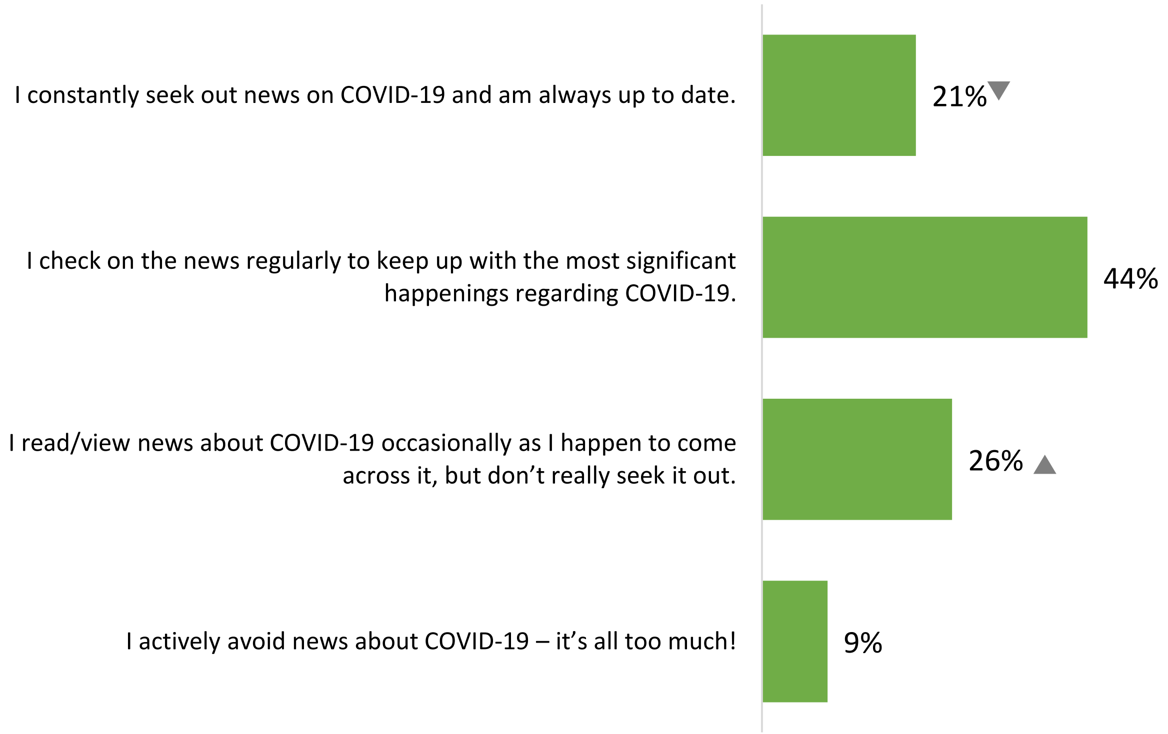

*Q11 - Overall, how much of an impact would you say the Coronavirus/Covid-19 situation has had on your daily life? Base: Total*
*Q23 - Now fast forwarding 30 days, how much of an impact do you think the Coronavirus/Covid-19 situation will be having on your daily life at that time? Base: Total*
*Q24 - 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: Total*

# Awareness, Perceptions, Concerns

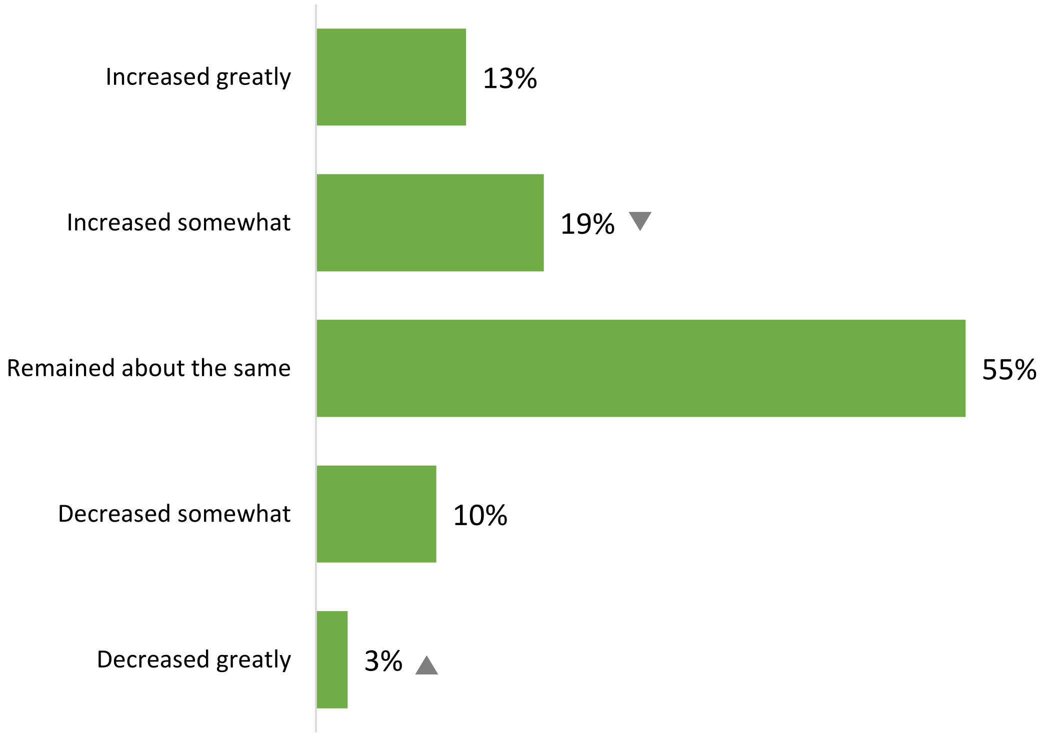
- Covid-19 Awareness, Concern
- Health Concerns
- Economic Concerns
- Perceived Severity

# Pandemic-driven news consumption eases somewhat this week, but a majority of Americans remain highly tuned in to the latest pandemic developments.

## Attitudes toward News about Covid-19



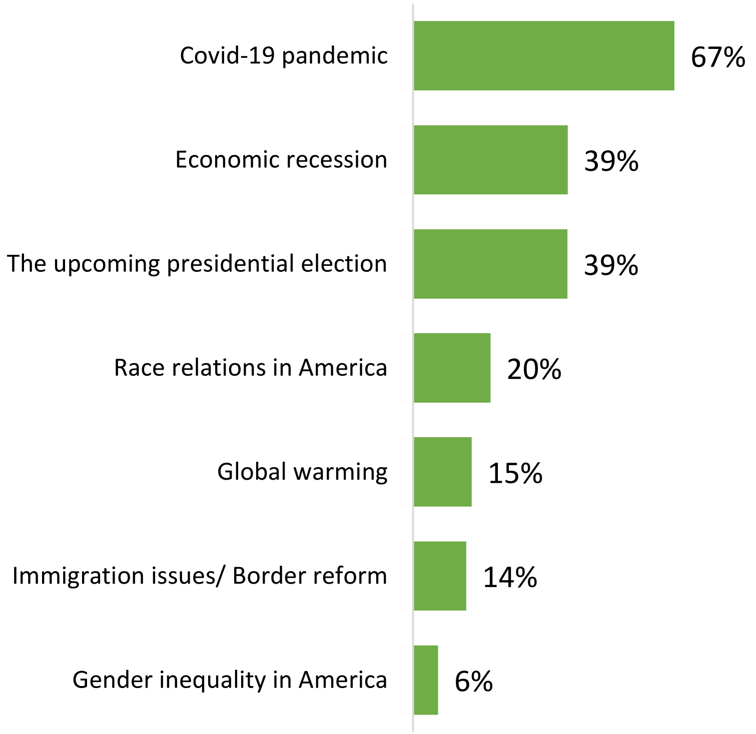

## Change in Amount of News Consumed about Covid-19



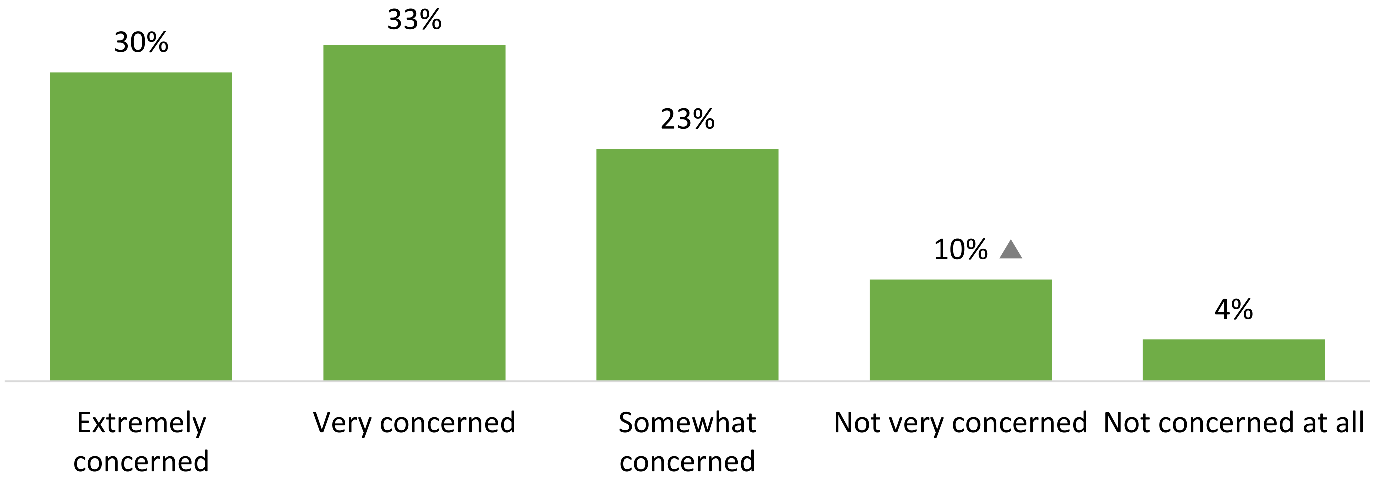

*Q6b – Overall, which statement below best represents how you feel about the amount of news about the Coronavirus/COVID-19 situation that you personally read/view? Base: Total*
*Q6c - Within the past week, would you say the amount of news you've consumed related to COVID-19 has... Base: Reads/watches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

# Two-thirds of Americans say that the pandemic is one of the most concerning societal issues overall (from among a list of several current topics). Concern levels remain about the same overall this wave, with the youngest generation continuing to show somewhat lower levels of concern.

## Social Issues/Concerns (% ranking first or second)




## Coronavirus/Covid-19 Concern Level

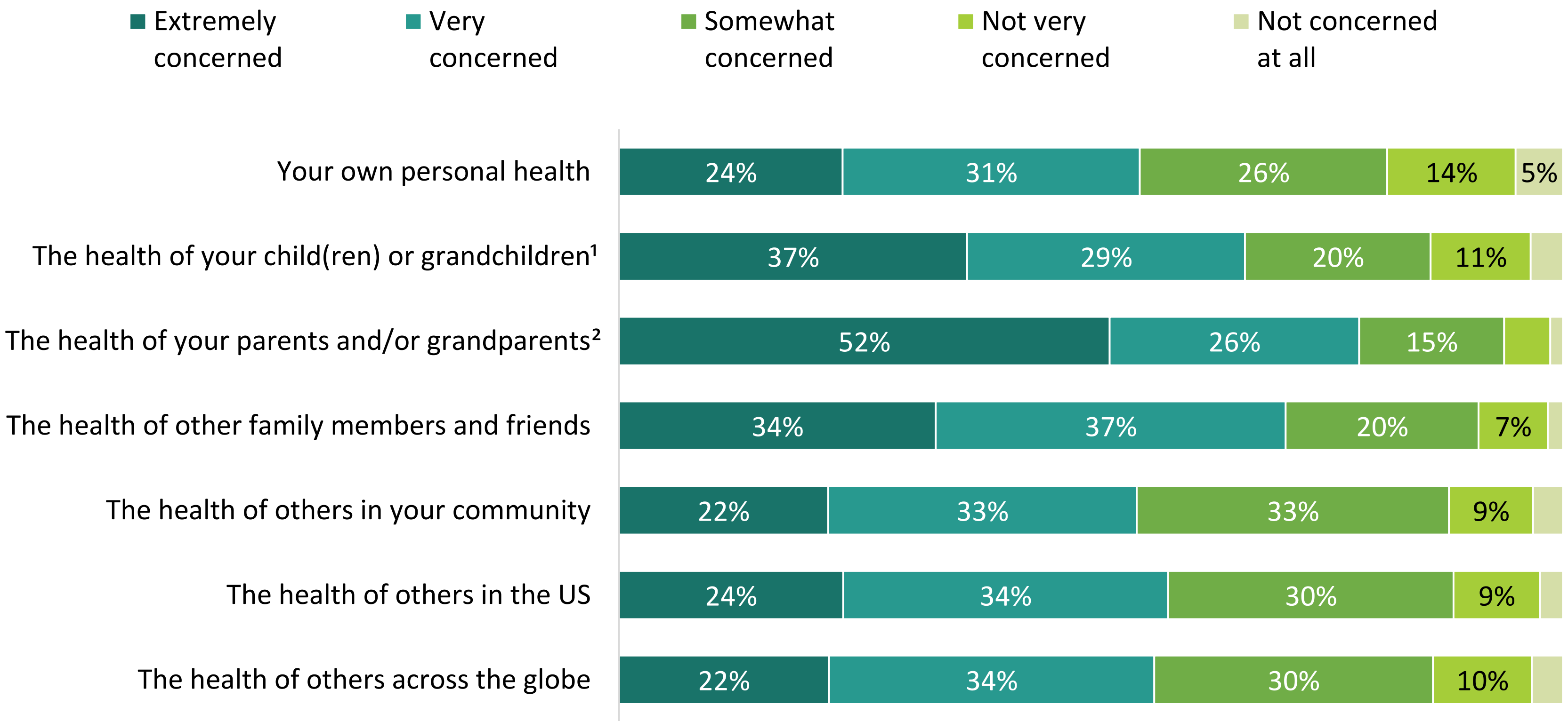



| | Extremely concerned | Very concerned | Somewhat concerned | Not very concerned | Not concerned at all | T2B |
|---|---|---|---|---|---|---|
| Under 30 | 20% | 39% | 25% | 12% | 4% | 60% |
| 30 to 44 | 31% | 34% | 21% | 8% | 6% | 65% |
| 45 to 59 | 30% | 30% | 21% | 15% | 4% | 60% |
| 60 and older | 38% | 30% | 24% | 6% | 2% | 68% |

*Q1b - Please rank the issues below from the one that you are most concerned about to the one you are least concerned about. Base: Total*
*Q7 - Overall, how would you characterize your current level of concern about the Coronavirus/Covid-19 situation? Base: Total*

# Health concerns are elevated again this wave, and are particularly high among the most elderly generation. Americans remain more concerned for the health of relatives (particularly parents/grandparents) and friends than for their own personal health.

## Coronavirus/Covid-19 Health Concerns



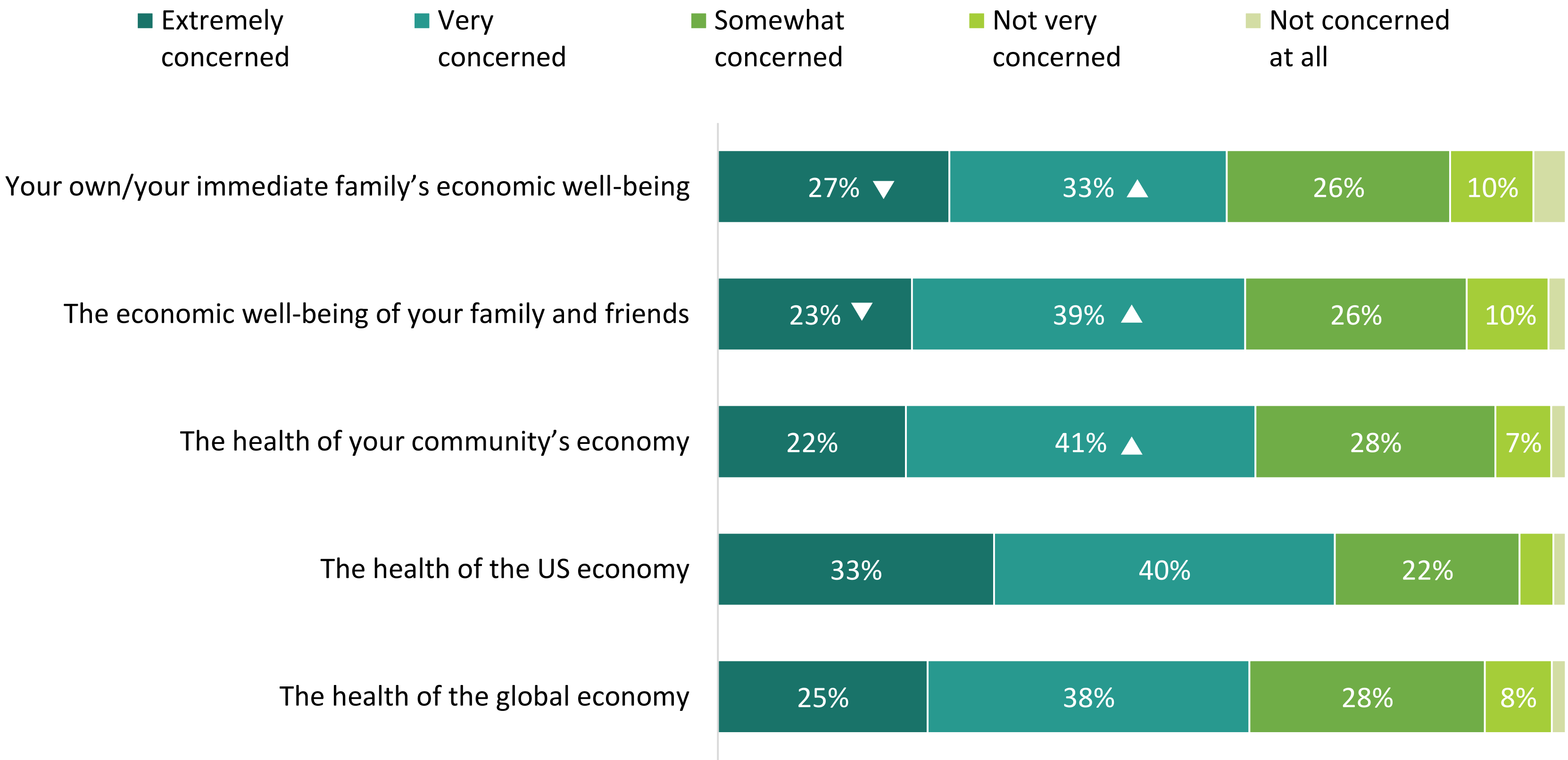

*T2B (Extremely/Very Concerned)*

| | Total | Under 30 | 30 to 44 | 45 to 59 | 60 and older |
|---|---|---|---|---|---|
| Your own personal health | **55%** | 46% | 57% | 55% | 61% |
| The health of your child(ren) or grandchildren[1] | **66%** | 55% | 70% | 61% | 70% |
| The health of your parents and/or grandparents[2] | **78%** | 77% | 81% | 78% | 77% |
| The health of other family members and friends | **71%** | 73% | 71% | 68% | 71% |
| The health of others in your community | **55%** | 51% | 55% | 51% | 61% |
| The health of others in the US | **58%** | 55% | 56% | 53% | 68% |
| The health of others across the globe | **57%** | 54% | 56% | 53% | 62% |

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

# Economic anxiety continues to match, and in some cases lead, health concerns. Americans between the ages of 45 and 59 are particularly likely to experience economic stress.

## Coronavirus/Covid-19 Economics Concerns



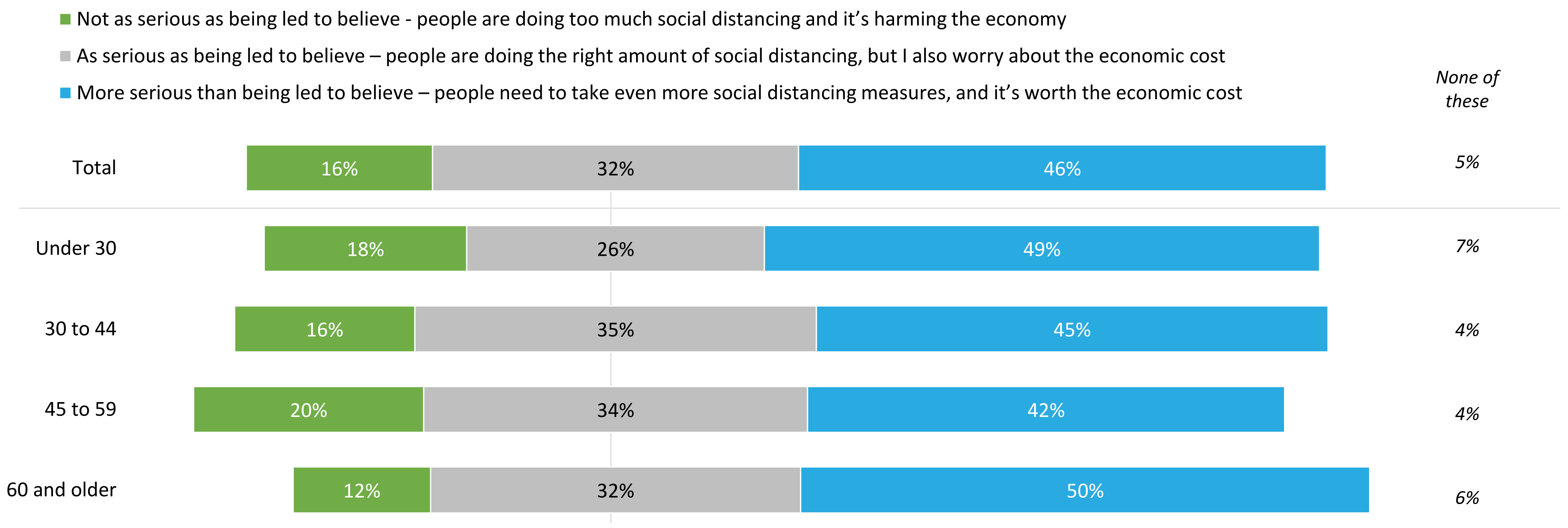

*T2B (Extremely/Very Concerned)*

| | Total | Under 30 | 30 to 44 | 45 to 59 | 60 and older |
|---|---|---|---|---|---|
| Your own/your immediate family's economic well-being | **60%** | 60% | 61% | 67% | 53% |
| The economic well-being of your family and friends | **62%** | 61% | 63% | 67% | 57% |
| The health of your community's economy | **63%** | 55% | 60% | 68% | 69% |
| The health of the US economy | **73%** | 64% | 67% | 77% | 81% |
| The health of the global economy | **63%** | 61% | 55% | 62% | 72% |

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

# As the pandemic presses on, driving health and financial anxiety, most Americans continue to believe that the outbreak is at least as serious as is being represented currently, and nearly half believe the situation is actually worse.

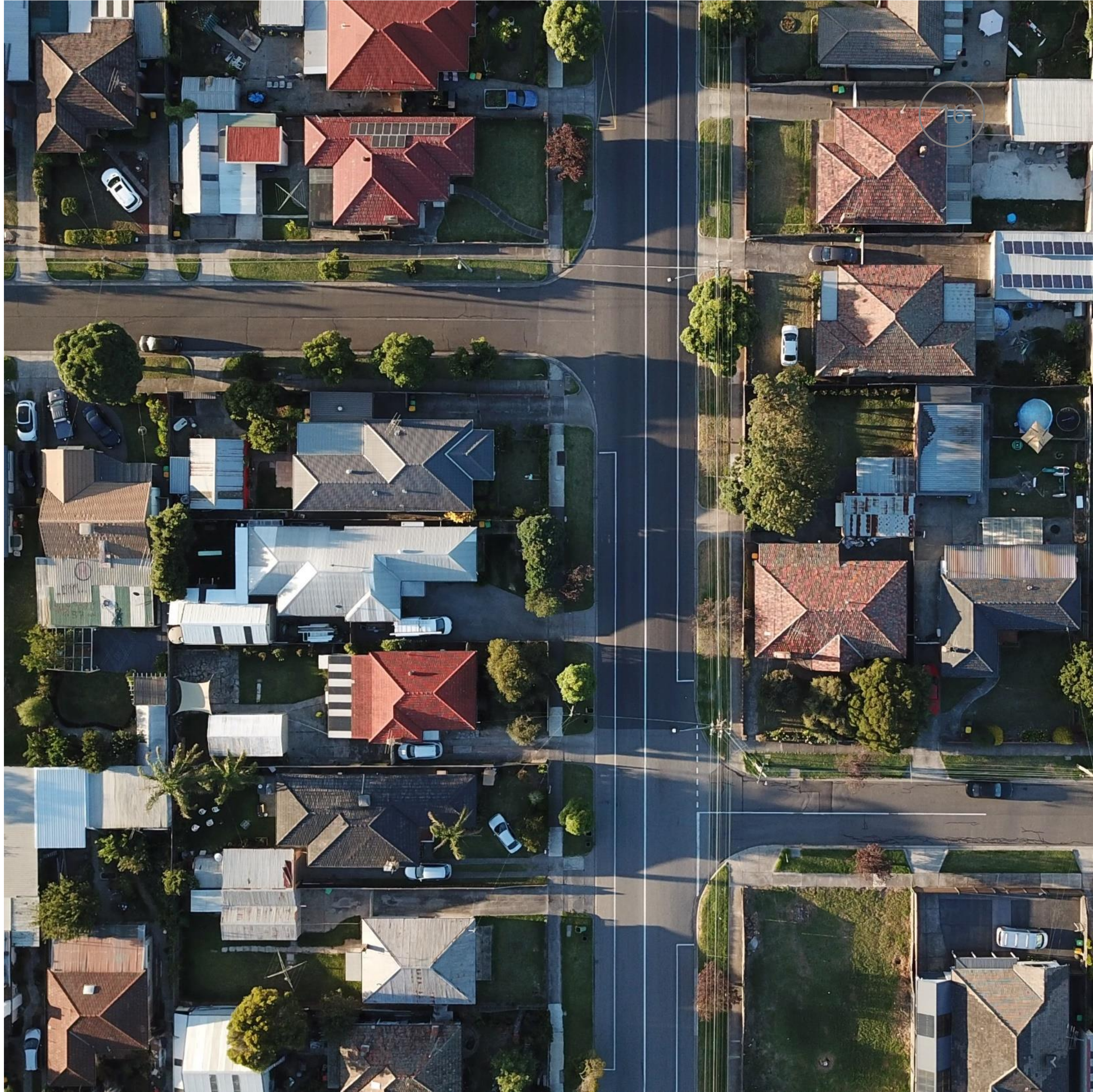
## Coronavirus/Covid-19 Perceived Severity




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

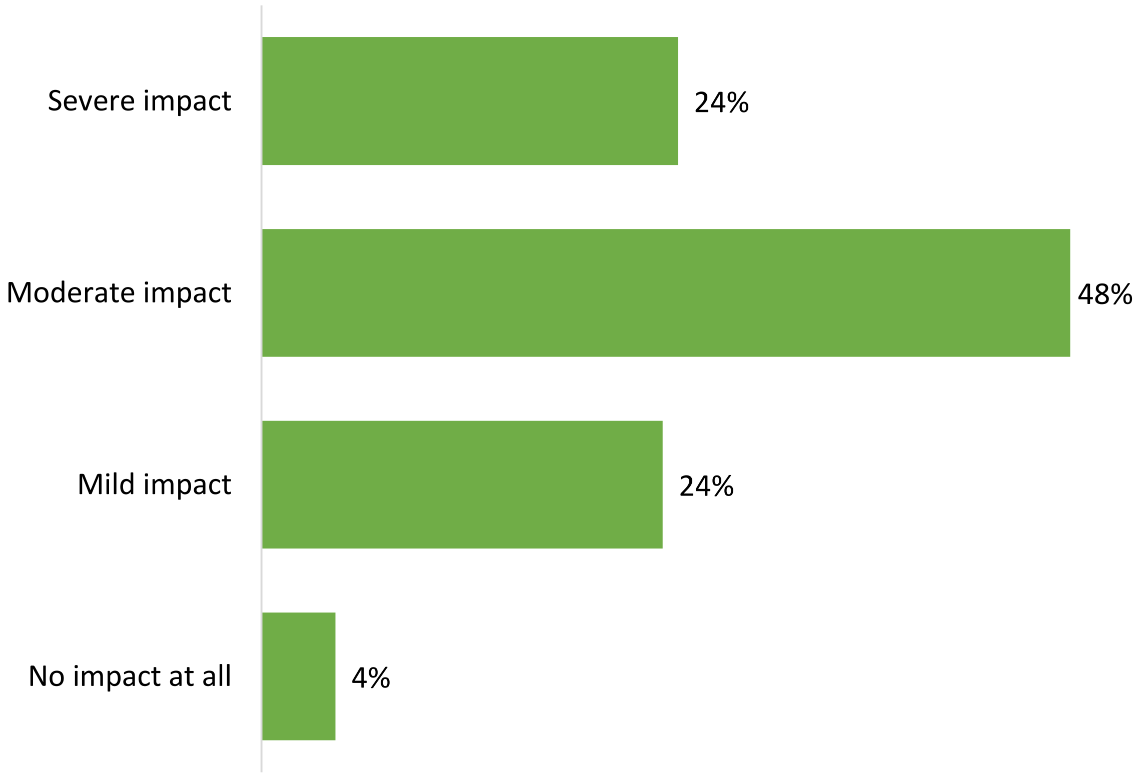
# Impact on Daily Life

- Overall Impact
- Behavioral Reactions



About three-quarters of Americans have been affected by the Covid-19 pandemic in a severe or moderate way. The millennial generation is especially likely to report that the pandemic has impacted their lives. Disruptions remain more prevalent in the Northeast, and among more affluent Americans.

## Coronavirus/Covid-19 Impact on Daily Life




| | Under 30 | 30 to 44 | 45 to 59 | 60 or older |
|---|---|---|---|---|
| Severe | 25% | 33% | 22% | 19% |
| Severe or Moderate | 70% | 78% | 76% | 65% |

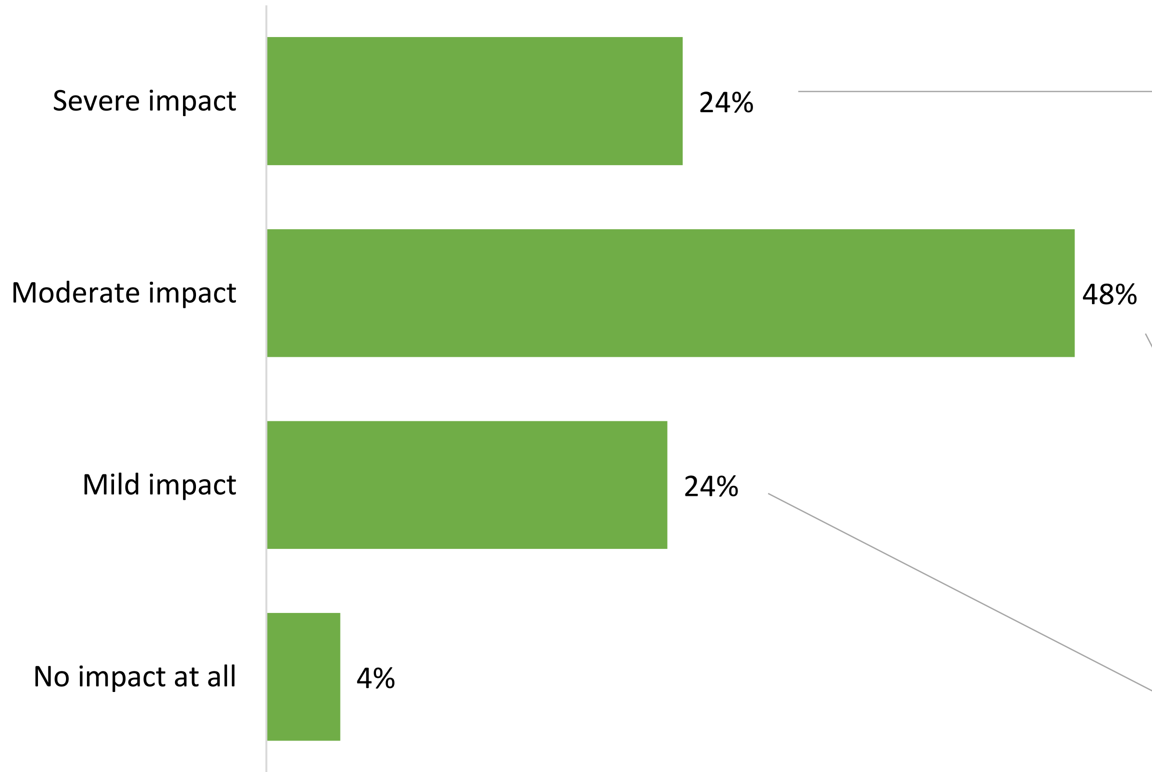
| | Under $50K | $50K to $100K | $100K or more |
|---|---|---|---|
| Severe | 23% | 23% | 28% |
| Severe or Moderate | 70% | 68% | 79% |

| | Northeast | Midwest | South | West |
|---|---|---|---|---|
| Severe | 22% | 24% | 24% | 27% |
| Severe or Moderate | 79% | 70% | 68% | 75% |

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

# The pandemic's effects manifest in a multitude of ways, and those who say the crisis has had a severe impact on their lives indicate a growing number of personal, financial, and social stressors. Those who have been less impacted by the pandemic speak more to the inconveniences brought on by altered daily routines.

## Coronavirus/Covid-19 Impact on Daily Life




"I can't travel to see my son, I can't go out to eat, I am looking for work and I am terrified to be out with the public."

"School and future jobs are on pause for some college students that are on the brink of graduation - its a bad situation."

"Family traditions with regard to members passing can't be followed. You can't hug your friends/family as freely; you can't catch happy hours with your crew; you can't go to the movies/dine-in"

"We are home. I have a newborn I can't take anywhere, my family and friends cannot visit or travel to see us. We have no summer enjoyment. We have no jobs. No work prospects."

"It has greatly changed the ways in which I communicate with friends and family. No longer make visits in person, only by phone or video chat. Store hours are far different than before so I have to plan accordingly."

"I only socialize in person in rare cases, I no longer go out for pleasure, I exercise more, I make less trips to stores, I've been growing more of my own food and using the internet to keep in touch."

"Both my spouse and I are working from home indefinitely. We typically travel for either business or leisure every month and haven't been doing so since March. We usually see family and friends every month who do not live near us and haven't since March."

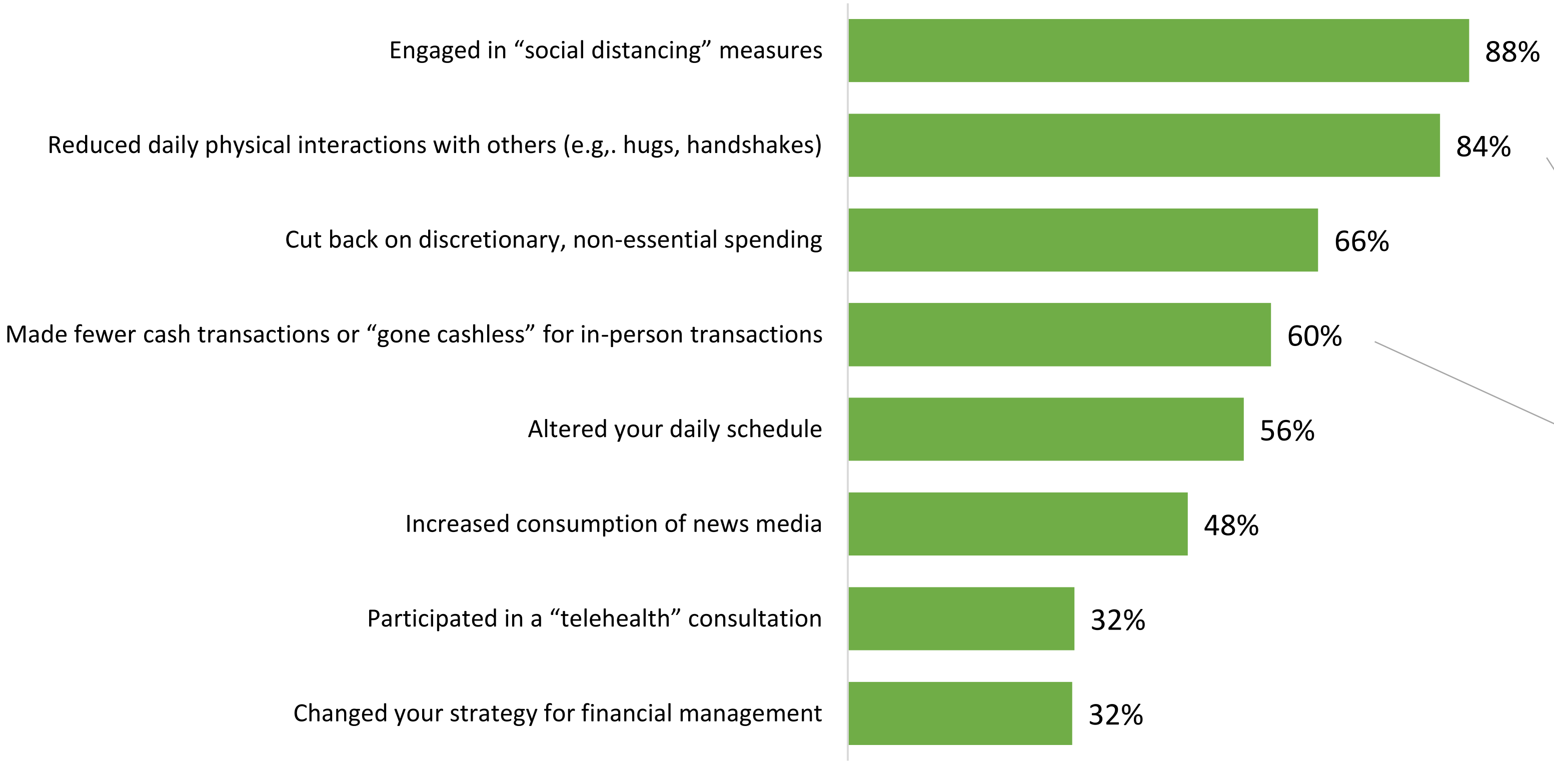
"I bought a house and due to offices being closed a lot of address changing and paperwork cannot be done. A lot have tardy fees that I will now have to pay because the offices are not open."

"Shopping trips require extra work/prep for safety, and need more planning."

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

# There is little change in the behavioral adaptations Americans are making to cope with the outbreak. Nearly nine in 10 Americans are still engaging in some form of social distancing. Americans also continue to alter their daily schedules and reduce daily physical interactions, and more Americans are cutting discretionary spending this wave.

## Behavioral Changes due to Coronavirus/Covid-19*

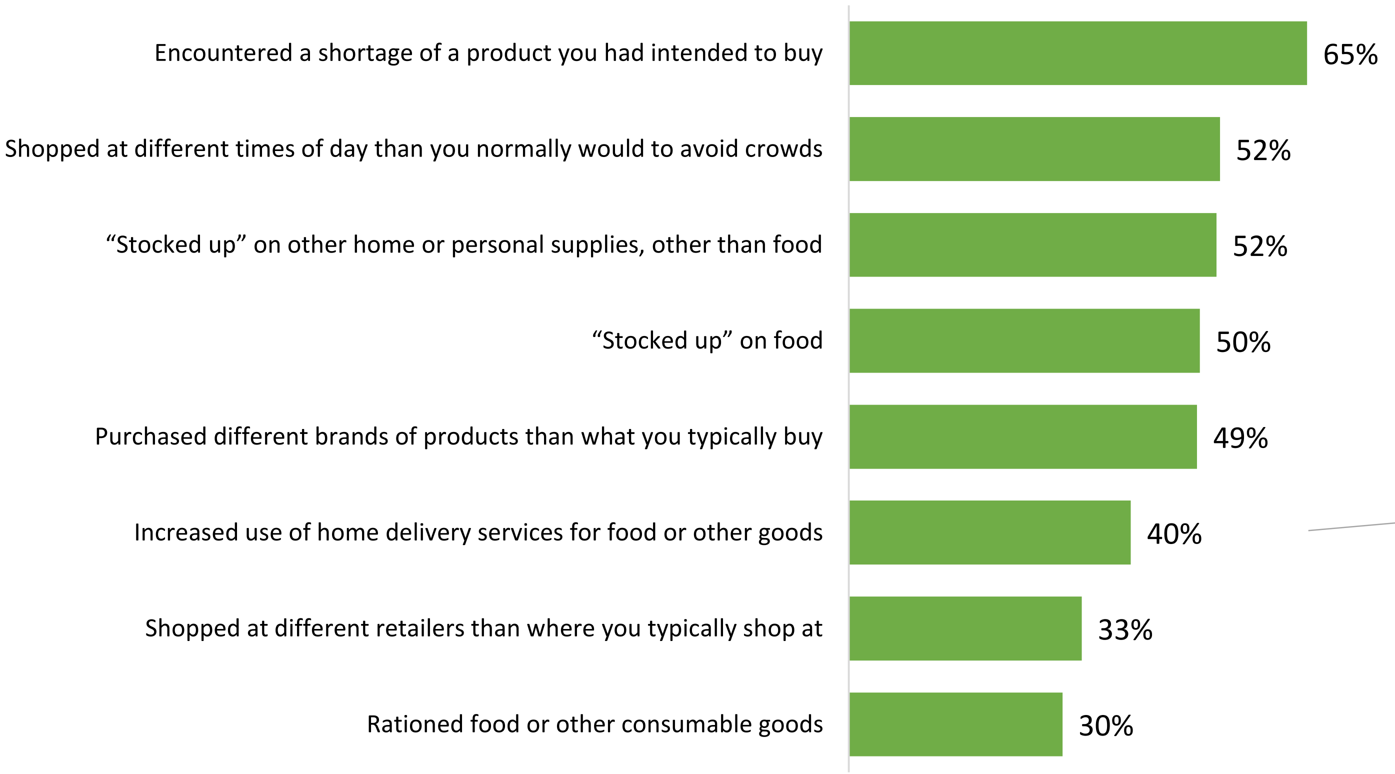



Northeasterners are more likely than other regions to:
- Reduce daily physical interactions(91%)
- Go cashless (68%)

*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: Total*

# A majority of American consumers are still encountering product shortages, but rates remain lower than throughout April, May, and June, when as many as 80 percent of consumers were unable to purchase products they had intended to buy.

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



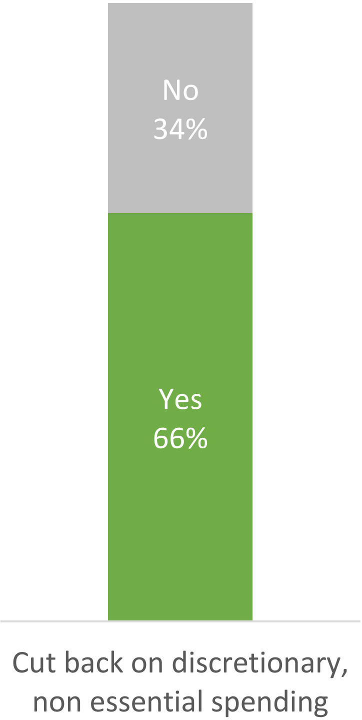

Higher income households ($100K+/year) are more likely than lower income households to:

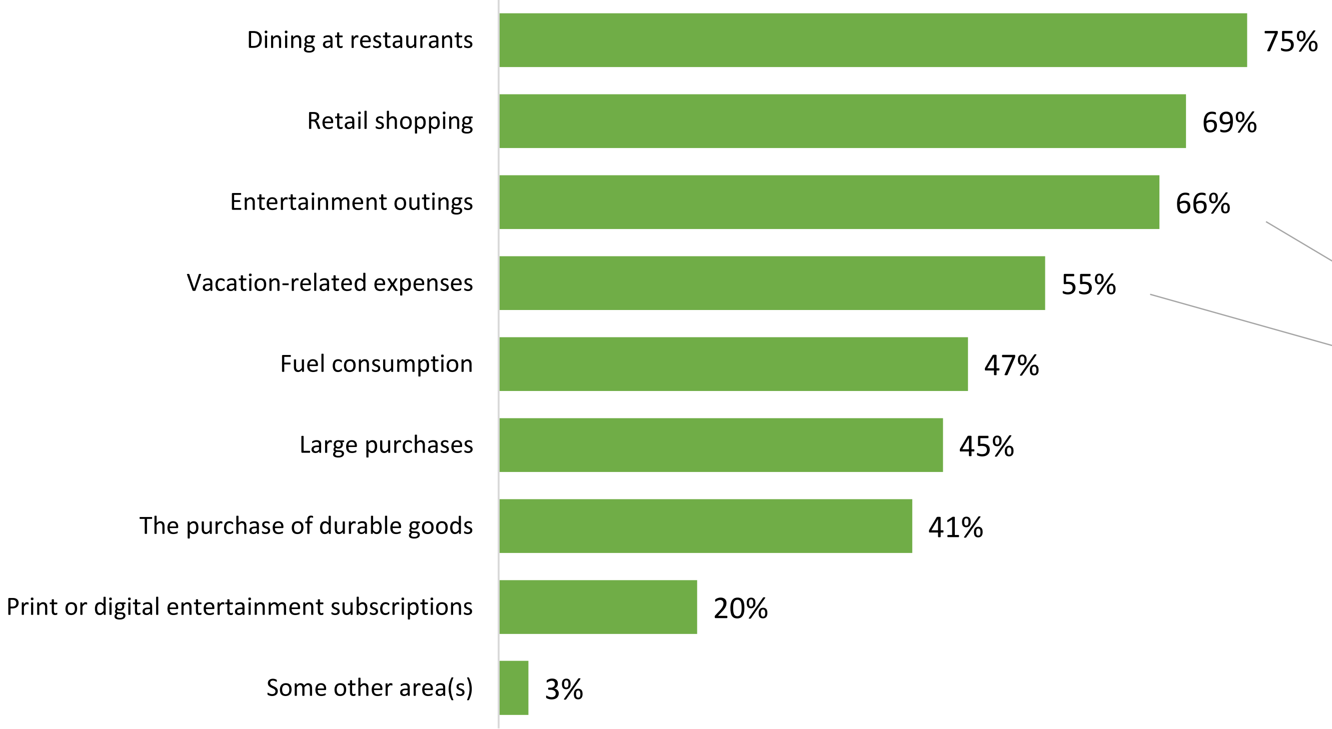
- Increased use of home delivery service (46%)

*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: Total*

For the 66 percent of Americans who have reduced spending within the past week as a result of the outbreak, dining, shopping, and other entertainment outings remain a prime target for spending cuts. Even as the summer travel season reaches its height, half of Americans are reducing their spend on vacations.

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



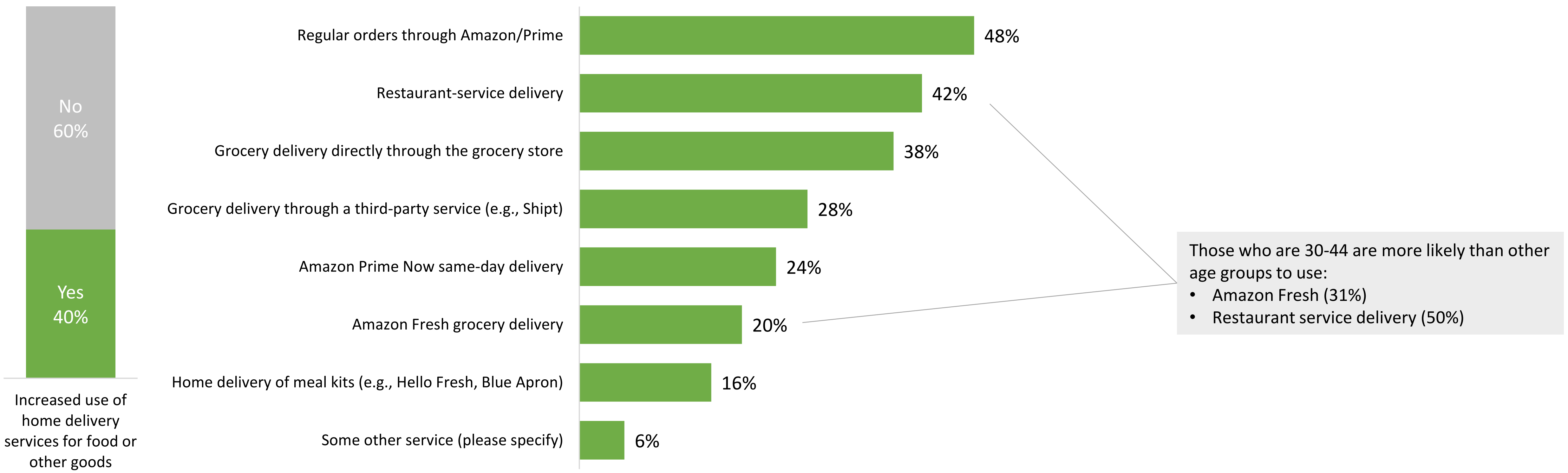

Higher income households ($100K+/year) are more likely to cut:

- Vacation-related expenses (63%)
- Entertainment outings (75%)

*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: Answered "Yes" to "Cut back on discretionary, non-essential spending" (Q13)*

# With four in 10 American consumers increasing their use of home-delivery services to access products while quarantined, many services (Amazon prime, restaurant service delivery, and grocery delivery) continue to see higher utilization.

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



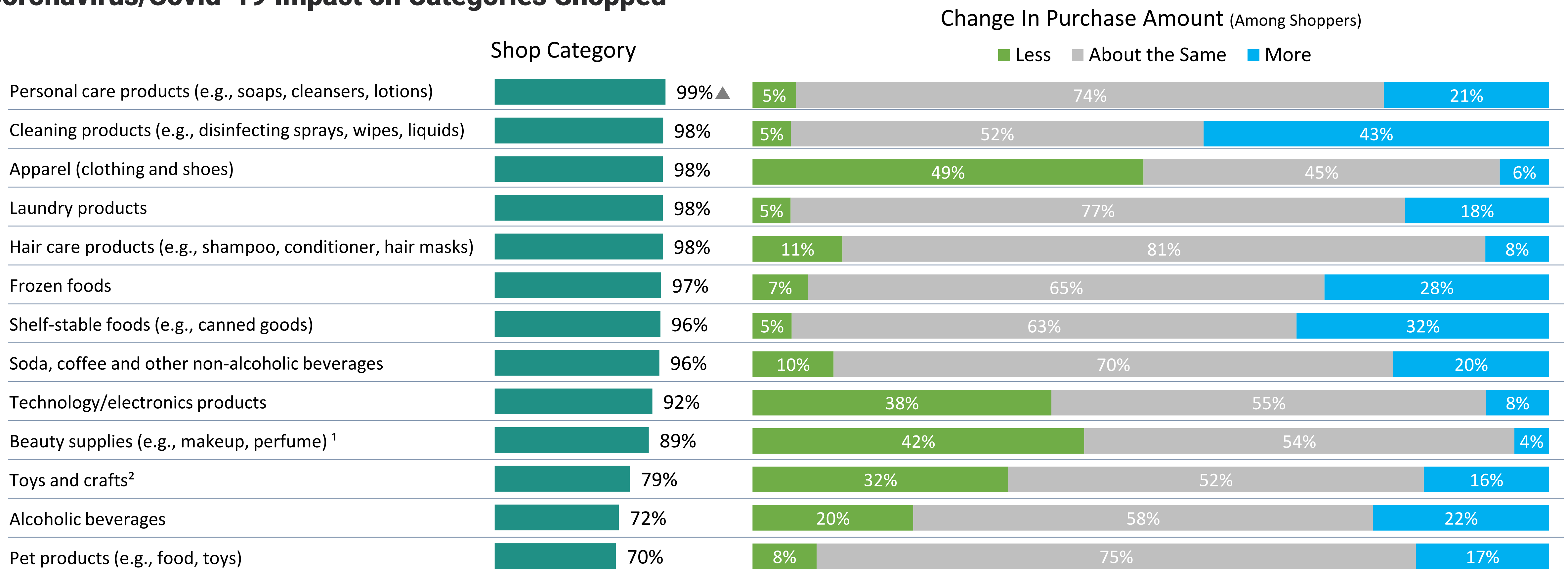

*Q16 - You indicated that you have increased your use of home delivery services for food or other goods as a result of the Coronavirus/Covid-19 situation. Which of the following service are you using, either for the first time or more than you did before? Base: Answered "Yes" to "Increased use of home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

# Changing Purchase Behaviors

- Category Purchase Volume
- Brand Loyalty

# There's little indication that pandemic-driven spending cuts to durable and luxury goods will recede any time soon. Conversely, supply categories like cleaning products and shelf-stable foods are seeing an enduring boost to shopper 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: Total*
*[1]Only shown to females; [2]Only shown to those with children or grandchildren ages 0-17*

# Consumers attribute some level of brand switching to the pandemic across all key categories. Among the categories measured, brand switching remains highest in cleaning products. Many consumers are also continuing to switch brands in toys and crafts.

## Coronavirus/Covid-19 Impact on Brands Purchased

Change In Brands Purchased (Among Shoppers)

| | Shop Category | Mostly/All Same Brands | Mostly/All Different Brands |
|---|---|---|---|
| Personal care products (e.g., soaps, cleansers, lotions) | 99%▲ | 84% | 16% |
| Cleaning products (e.g., disinfecting sprays, wipes, liquids) | 98% | 71% | 29% |
| Apparel (clothing and shoes) | 98% | 80% | 20% |
| Laundry products | 98% | 86% | 14% |
| Hair care products (e.g., shampoo, conditioner, hair masks) | 98% | 86% | 14% |
| Frozen foods | 97% | 81% | 19% |
| Shelf-stable foods (e.g., canned goods) | 96% | 80% | 20% |
| Soda, coffee and other non-alcoholic beverages | 96% | 87% | 13% |
| Technology/electronics products | 92% | 86% | 14% |
| Beauty supplies (e.g., makeup, perfume) [1] | 89% | 86% | 14% |
| Toys and crafts[2] | 79% | 76% | 24% |
| Alcoholic beverages | 72% | 85% | 15% |
| Pet products (e.g., food, toys) | 70% | 86% | 14% |

*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: Shop Category (Q17)*
*[1]Only shown to females; [2]Only shown to those with children or grandchildren ages 0-17*

# Reports of brand switching due to product stockouts is down in cleaning products this wave, although the category remains the most likely to see brand switching behavior as a result of shortages.

## 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) | 16% | 40% | 44% | 17% ▼ | 14% | 1% |
| Cleaning products (e.g., disinfecting sprays, wipes, liquids) | 29% | 55% ▼ | 30% | 15% | 12% | 2% |
| Apparel (clothing and shoes) | 20% | 16% | 55% ▲ | 24% ▼ | 9% | 5% |
| Laundry products | 14% | 25% | 47% | 19% | 21% | 1% |
| Hair care products (e.g., shampoo, conditioner, hair masks) | 14% | 21% | 45% | 24% | 19% | 1% |
| Frozen foods | 19% | 36% | 37% | 29% | 16% | 1% |
| Shelf-stable foods (e.g., canned goods) | 20% | 42% | 42% | 27% | 12% | 1% |
| Soda, coffee and other non-alcoholic beverages | 13% | 28% | 45% | 26% | 16% | 2% |
| Technology/electronics products | 14% | 19% | 47% | 21% ▼ | 19% | 6% |
| Beauty supplies (e.g., makeup, perfume) [1] | 14% | 31% ▲ | 46% | 17% ▼ | 21% | 4% |
| Toys and crafts[2] | 24% | 22% | 45% | 26% ▼ | 20% | 2% |
| Alcoholic beverages | 15% | 17% | 38% | 45% | 18% | 2% |
| Pet products (e.g., food, toys) | 14% | 17% | 50% | 31% | 14% | 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: Shop Category (Q17)*
*[1]Only shown to females; [2]Only shown to those with children or grandchildren ages 0-17*

# As brand switching behavior is seen across all measured categories, a portion of those consumers who have tried new brands in each category are planning to stick with at least some mix of old and new brands even when shopper experiences begin to return to normal.

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

Intention to Switch Back to Previous Brands (Among Shoppers of Different Brands)

| Category | Shop Category & Buying Different Brands | Return to previous brands | Use mix of old/new brands | Stay with current brands |
|---|---|---|---|---|
| Personal care products (e.g., soaps, cleansers, lotions) | 16% | 38% | 41% | 21% |
| Cleaning products (e.g., disinfecting sprays, wipes, liquids) | 29% | 44% | 40% | 16% |
| Apparel (clothing and shoes) | 20% | 29% | 52% | 19% |
| Laundry products | 14% | 34% | 44% | 22% |
| Hair care products (e.g., shampoo, conditioner, hair masks) | 14% | 31% | 44% | 25% |
| Frozen foods | 19% | 29% | 48% | 23% |
| Shelf-stable foods (e.g., canned goods) | 20% | 41% | 44% | 14% |
| Soda, coffee and other non-alcoholic beverages | 13% | 34% | 46% | 20% |
| Technology/electronics products | 14% | 33% | 46% | 20% |
| Beauty supplies (e.g., makeup, perfume) [1] | 14% | 39% | 44% | 17% |
| Toys and crafts[2] | 24% | 33% | 48% | 19% |
| Alcoholic beverages | 15% | 28% | 53% | 19% |
| Pet products (e.g., food, toys) | 14% | 28% | 50% | 22% |

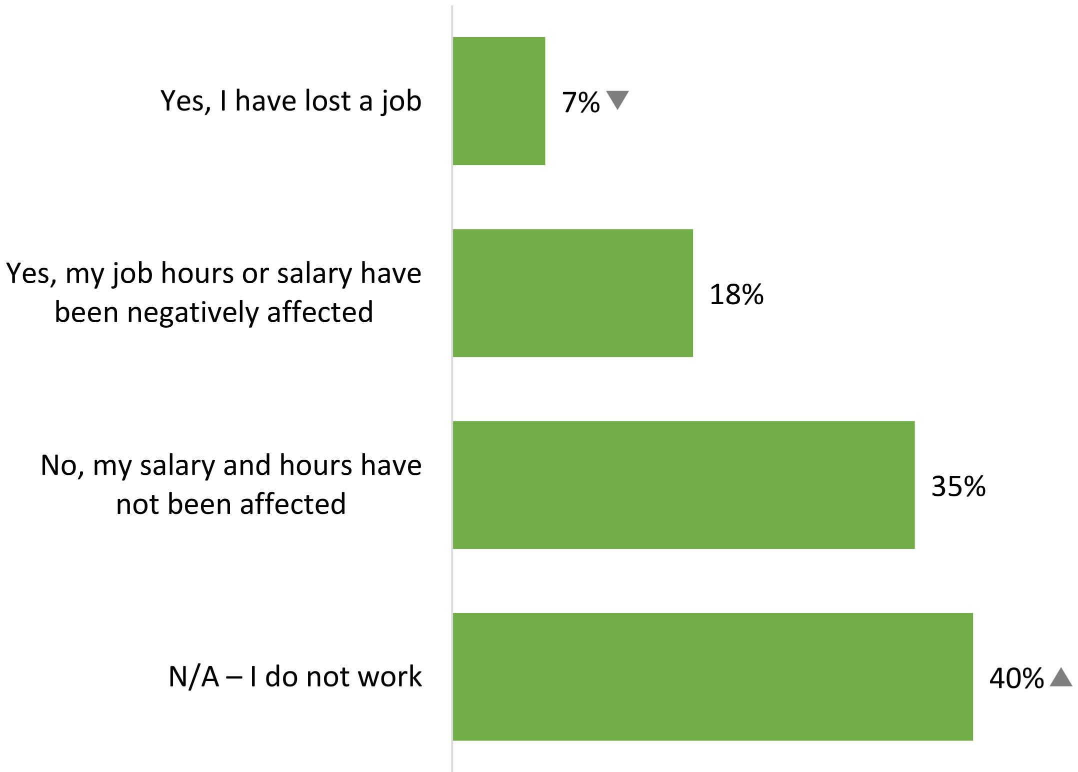
*Q18b - And, for each of these categories in which you are buying different brands, once the pandemic's effects ease do you think that you will…[answer options]? Base: Shop Category (Q17)*
*[1]Only shown to females; [2]Only shown to those with children or grandchildren ages 0-17*

# Employment Impact

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

# Reported job losses are down marginally from previous waves, but overall impacts to employment remain a pressing challenge for a quarter of Americans. While employment impacts have largely equalized across the nation geographically, younger workers remain more likely to have experienced disruption to their jobs.

## Coronavirus/Covid-19 Impact on Employment




| | Under 30 | 30 to 44 | 45 to 59 | 60 or older |
|---|---|---|---|---|
| Lost Job | 10% | 8% | 6% | 5% |
| Lost Job or Wages | 35% | 31% | 24% | 14% |

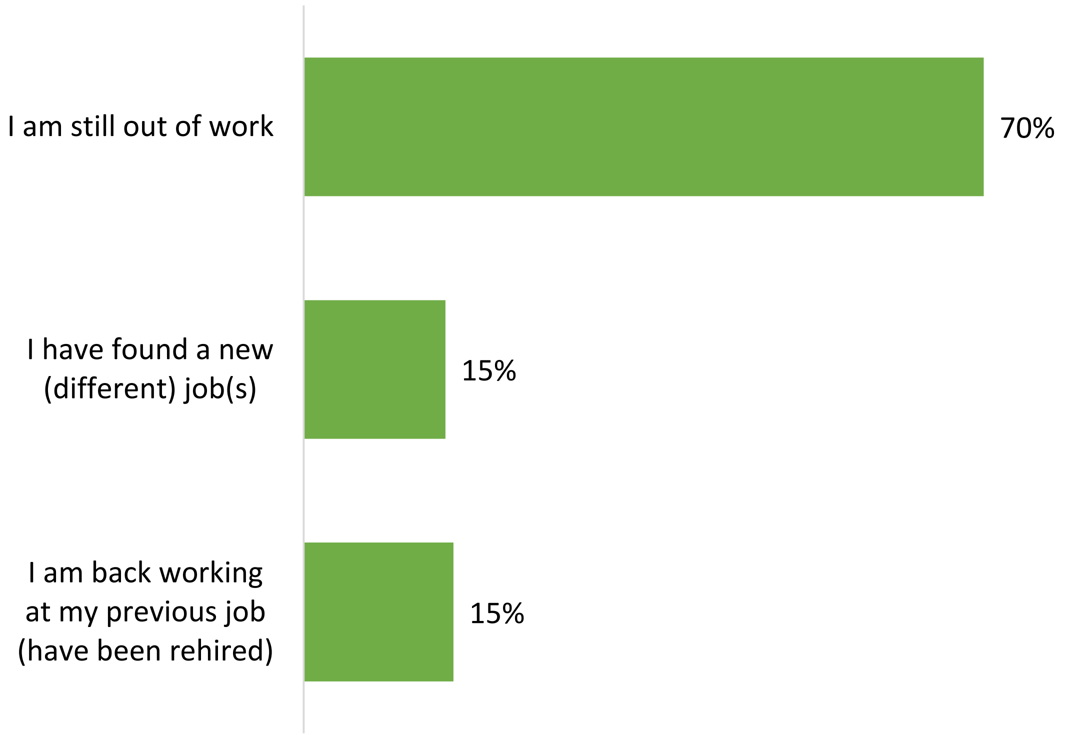
| | Male | Female |
|---|---|---|
| Lost Job | 5% | 9% |
| Lost Job or Wages | 25% | 26% |

| | Northeast | Midwest | South | West |
|---|---|---|---|---|
| Lost Job | 10% | 6% | 6% | 7% |
| Lost Job or Wages | 29% | 26% | 22% | 27% |

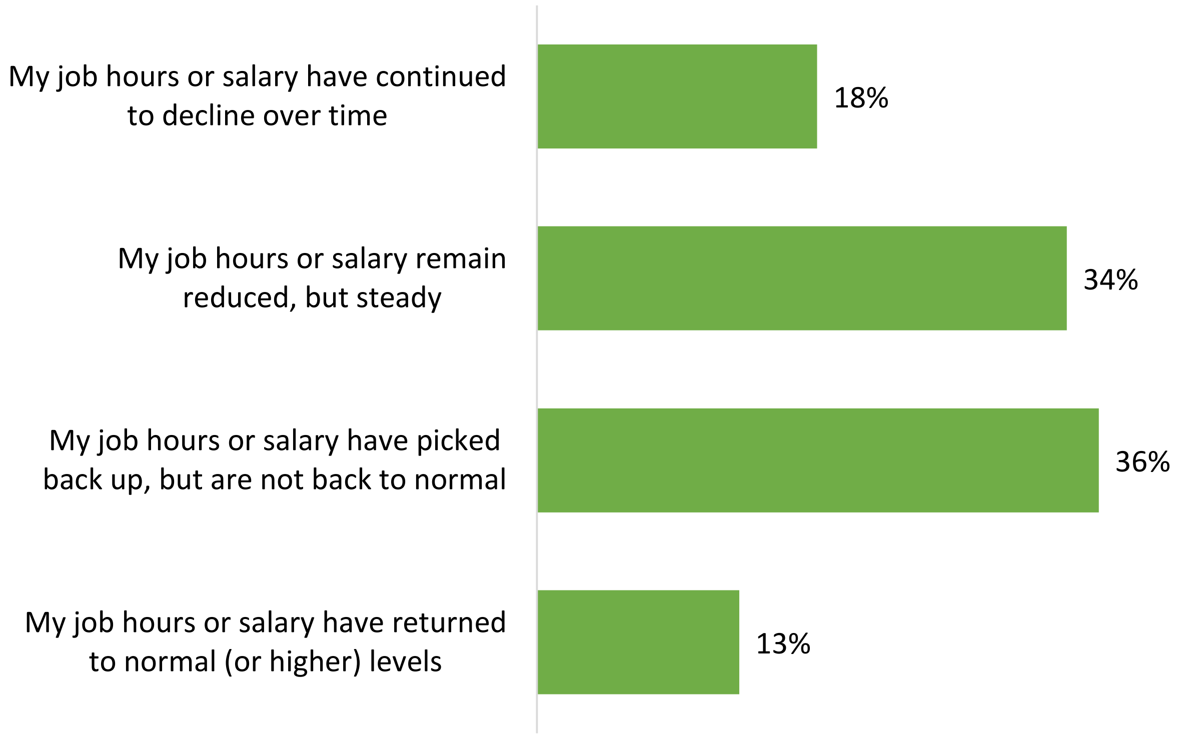
*Q19 - At any point, did you lose a job or were your job hours or salary negatively affected by the Coronavirus/Covid-19 situation? Base: Total*

# Seventy percent of Americans who have lost a job remain out of work. Among those that experienced a reduction of pay in some form, only about one in ten have regained those losses so far.

## Employment Recovery Among Those Who Lost Job




## Employment Recovery Among Those With Reduced Hours/Salary



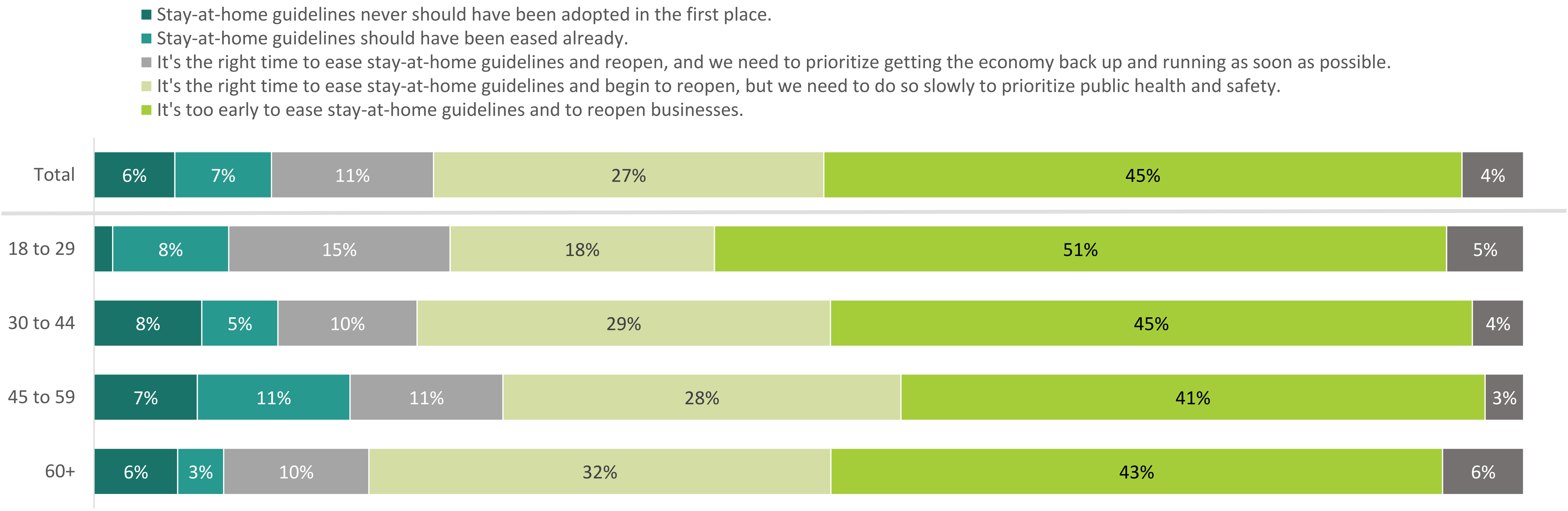

*Q19a - You indicated that you have lost a job due to the Coronavirus/Covid-19 situation. Which statement below best describes your current situation regarding that job loss? Base: Lost a job*
*Q19b - You indicated that your job hours or salary were negatively affected by the Coronavirus/Covid-19 situation.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

# Outlook

- Consumer Confidence
- Projected Impact
- Anticipated Recovery Time

# With the Covid-19 outlook turning more bleak for the remainder of the summer, a large number of Americans still feel it's too early to reopen business at all this wave. About one-quarter would still support reopening, but not at the expense of public health.

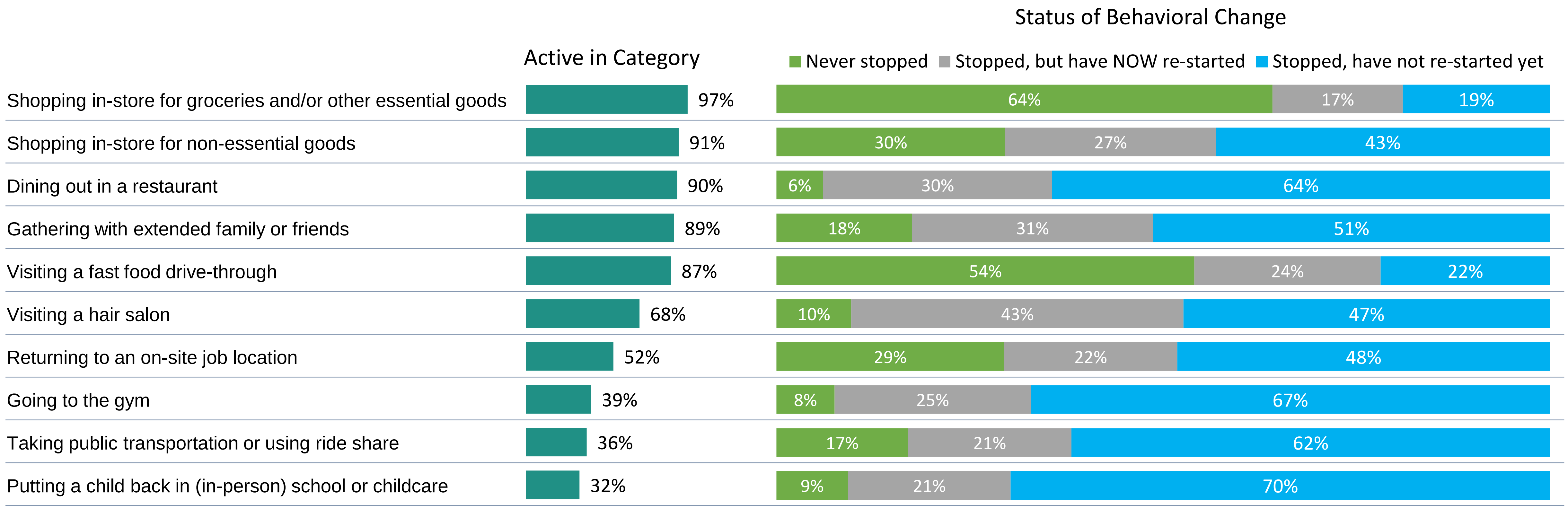
## Perceptions of "Reopening"




*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: Total*

# Many Americans never stopped certain activities during the pandemic, especially shopping in-store for groceries and visiting a fast food drive-through. Around thirty percent of Americans who had stopped or suspended certain activities have now resumed those activities, including visiting a hair salon, gathering with others, shopping for non-essential goods, and dining out.

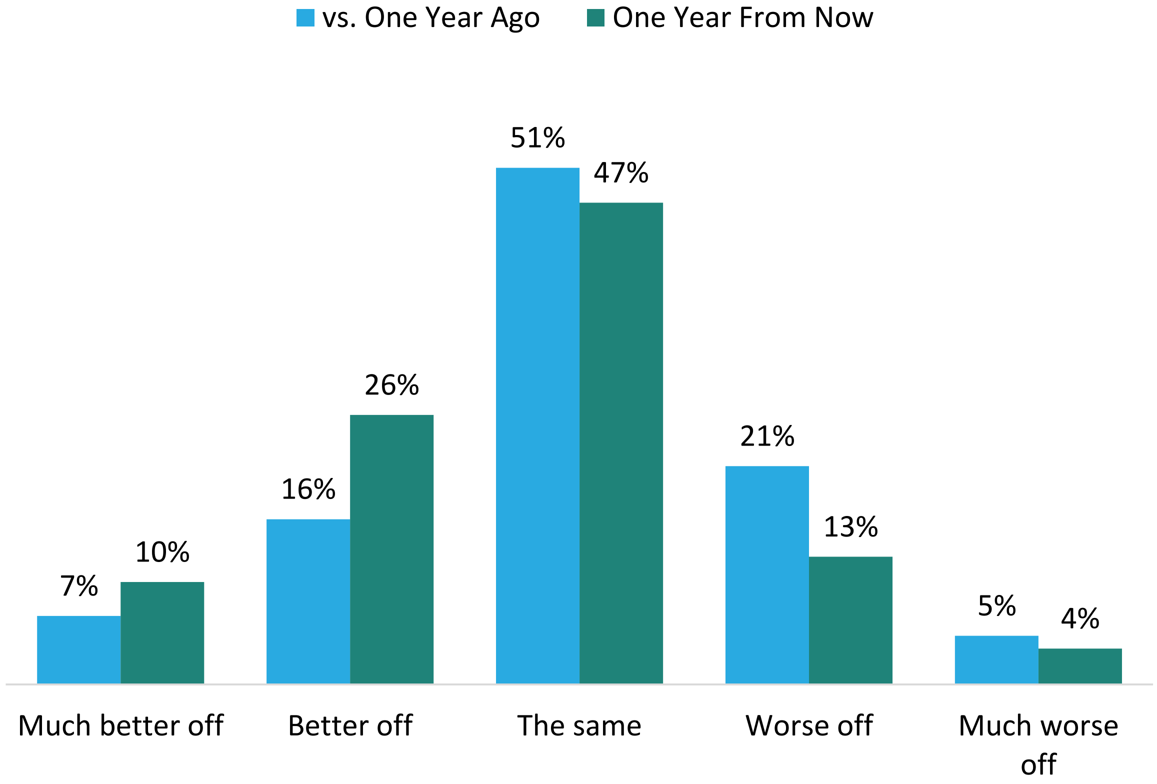
## Behavioral Change as Communities Reopen



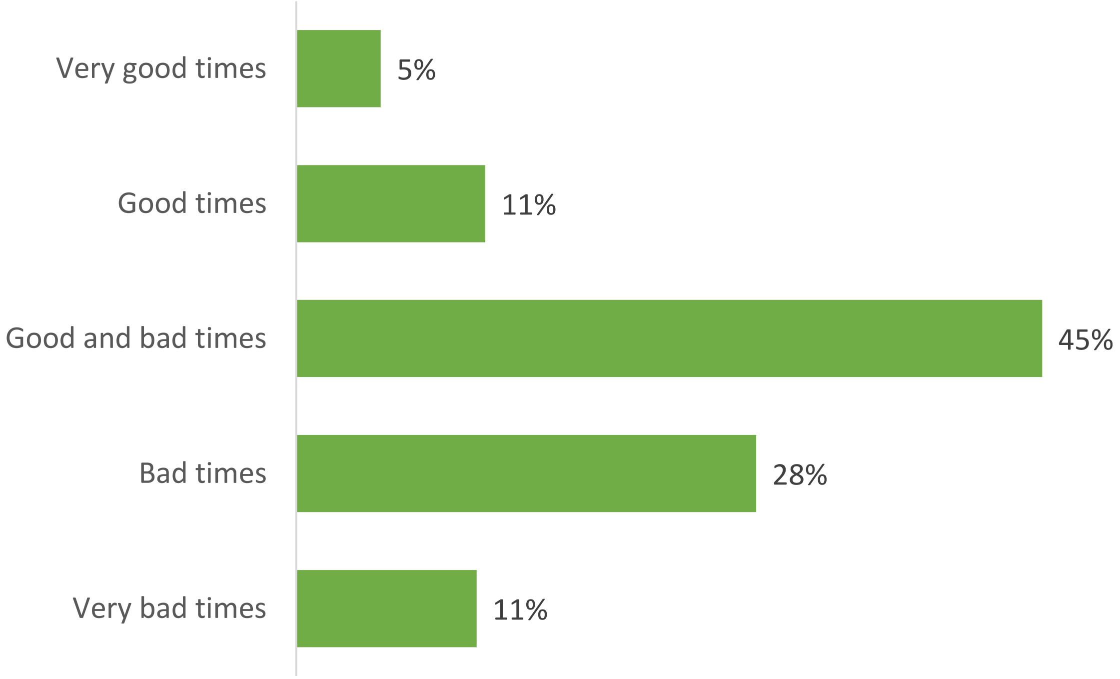

*Q35 - As communities reopen, we are interested in understanding how people's behaviors may be changing. For each activity below, please indicate if you never stopped engaging in the behavior due to Covid-19, you stopped due to Covid-19 and have not re-started, you stopped but now have started engaging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

# As has been the case for many months, Americans maintain a cautious optimism when taking a long-term view of their financial state. Despite most anticipating some turbulent business conditions in the coming year, Americans largely don't expect to be negatively impacted.

## Personal Financial State vs. One Year Ago, From Now



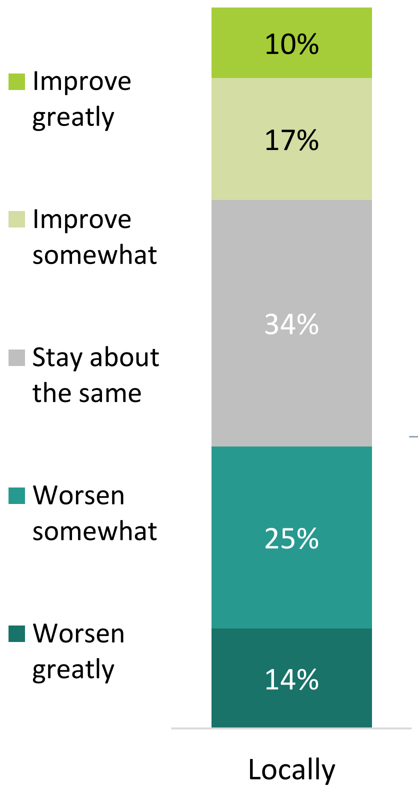

## US Business Financial State Over Next 12 Months



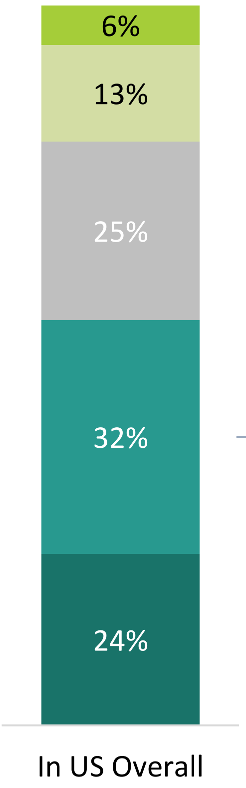

*Q2 - Would you say that you/your family are better or worse off financially than you were a year ago? Base: Total / Q3 - Now looking to the future: Do you think one year from now you/your family will be better or worse off than you are today? Base: Total / Q4 - Now thinking about business conditions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

# The 30-day outlook remains largely unchanged from its dip at the local, national, and global levels last wave. Those 60 and older are even somewhat less optimistic about how the pandemic will unfold.

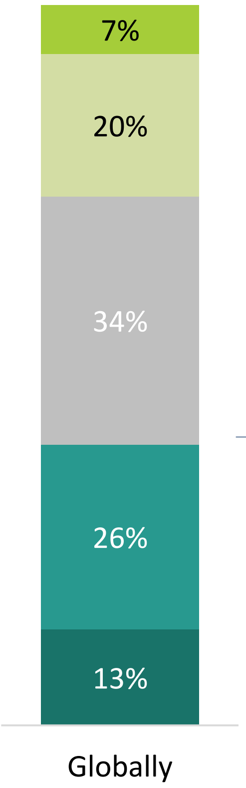
## Anticipated Change to Coronavirus/Covid-19 Situation in Next 30 Day




| | Worsen | Improve |
|---|---|---|
| Under 30 | 31% | 34% |
| 30 to 44 | 39% | 27% |
| 45 to 59 | 41% | 29% |
| 60 and older | 43% | 18% |
| Northeast | 28% | 34% |
| Midwest | 38% | 27% |
| South | 39% | 29% |
| West | 48% | 18% |




| | Worsen | Improve |
|---|---|---|
| Under 30 | 56% | 16% |
| 30 to 44 | 49% | 22% |
| 45 to 59 | 58% | 19% |
| 60 and older | 61% | 18% |
| Northeast | 60% | 21% |
| Midwest | 55% | 21% |
| South | 51% | 21% |
| West | 63% | 12% |



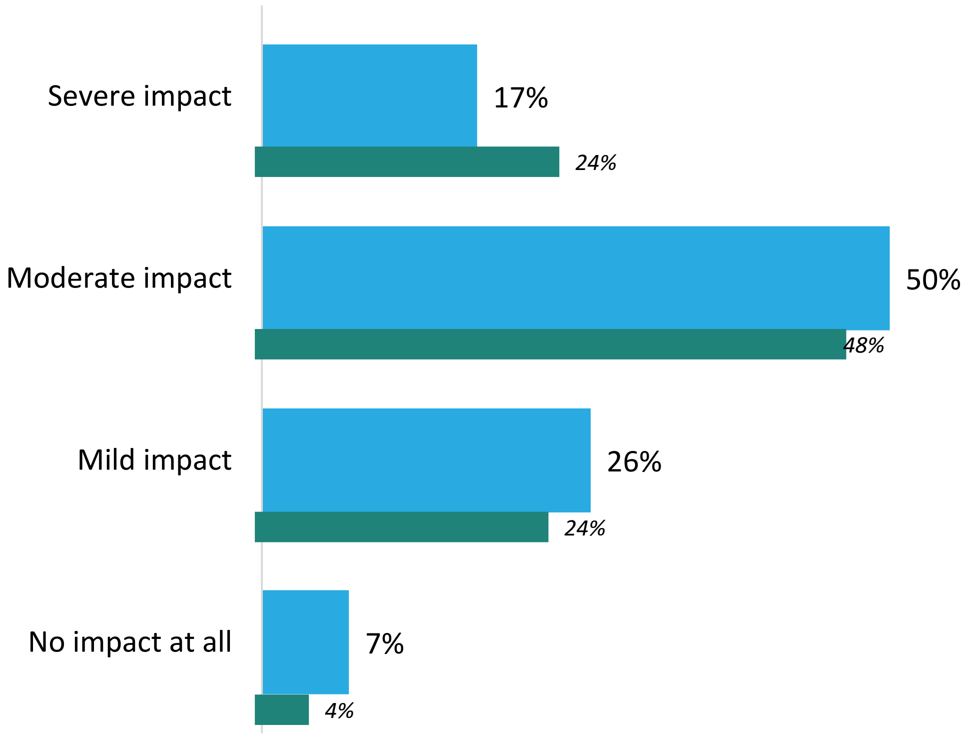

| | Worsen | Improve |
|---|---|---|
| Under 30 | 33% | 29% |
| 30 to 44 | 33% | 28% |
| 45 to 59 | 46% | 24% |
| 60 and older | 43% | 25% |
| Northeast | 43% | 27% |
| Midwest | 39% | 28% |
| South | 35% | 30% |
| West | 43% | 20% |

*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: Total*

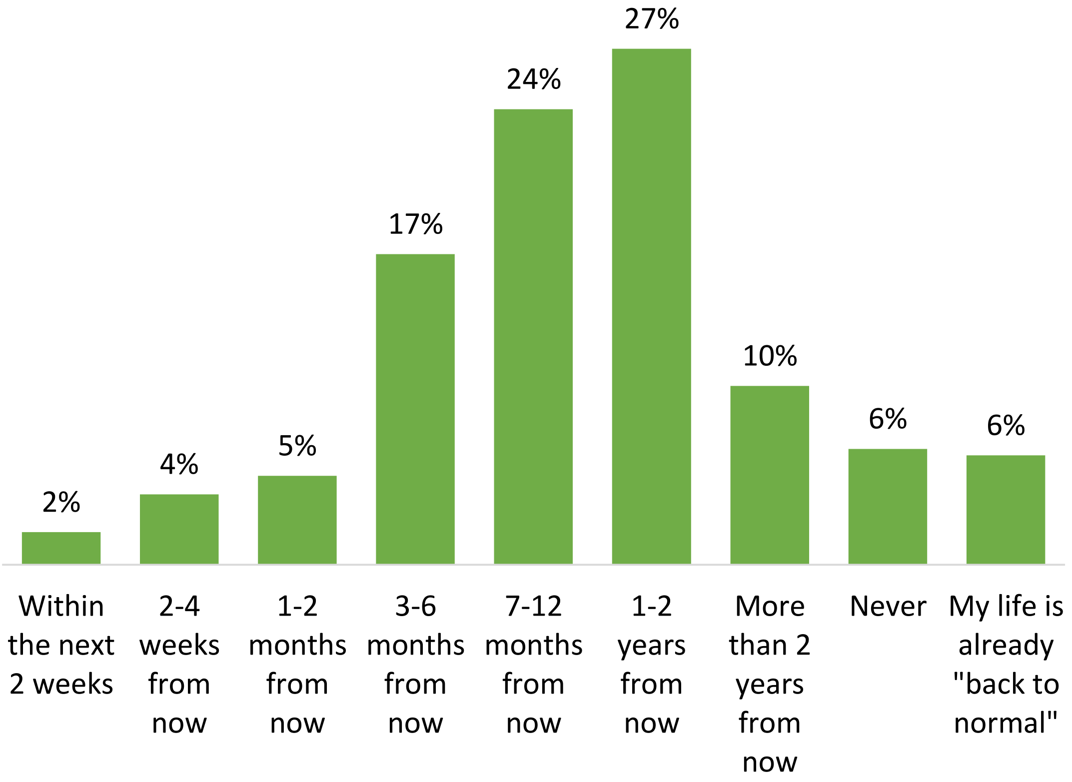
# With a  majority of Americans expecting a severe or moderate impact on their daily lives in the immediate future, most don't expect things to return to "normal" any time soon – the average anticipated time until things are back to normal remains over 12 months.

## 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: Total*
*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: Total*

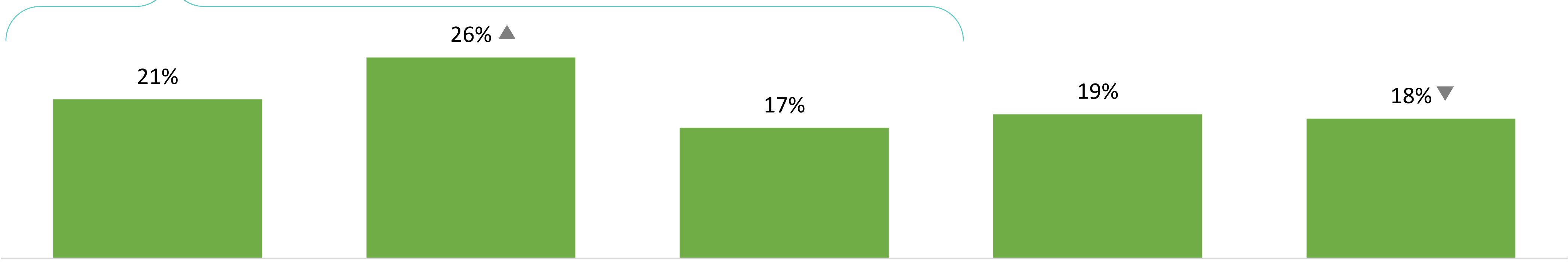
# Pulse Topics

- School Reopening – Preferred Format
- Comfort with Travel

# As parents continue to evaluate the tradeoffs involved with different proposed class formats for the coming school year, many are leaning toward an exclusively online model, as those supporting fully in-person classes begins to diminish.

Nearly two thirds of parents (64%) now prefer an online format.

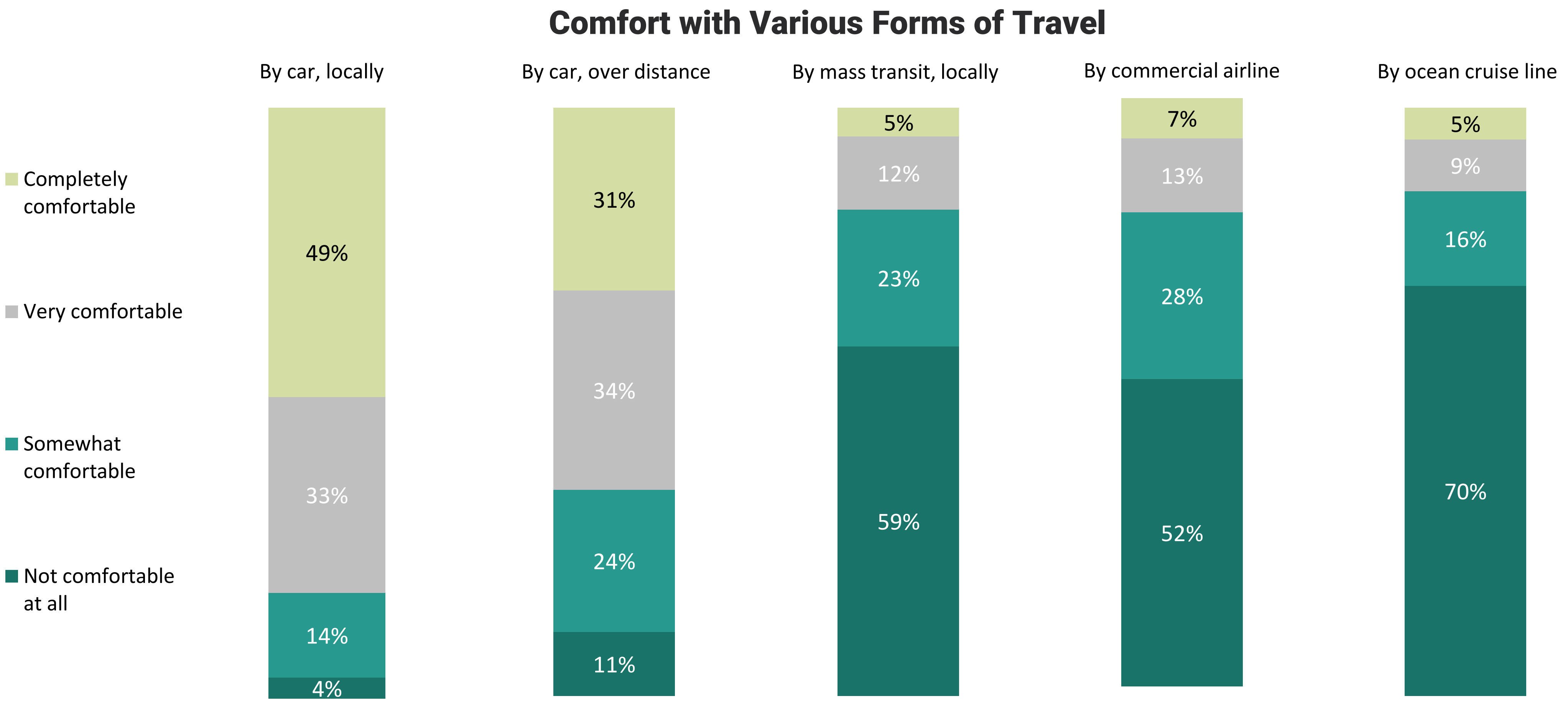
## Preferred learning format as classes begin




| | Online – Asynchronous (no real-time interactions with teacher and other students, can be done flexibly at time of day selected by family) | Online – Synchronous (occurs in real-time, on a set schedule with teacher and other students) | Online – Mix of asynchronous and synchronous | Hybrid - Mix of online and in-person learning (e.g., 3 days in-person/2 days online) | In-person/On-campus |
|---|---|---|---|---|---|
| Under 30 | 26% | **14%** | **38%** | 11% | 11% |
| 30 to 44 | 24% | 24% | **21%** | 14% | 17% |
| 45 to 59 | 17% | **22%** | **14%** | 21% | **27%** |
| 60 and older | 18% | **37%** | **9%** | 24% | **12%** |

*Q37 - Many states and school districts are making decisions about instruction format for the fall semester of the 2020-21 school year. What is your preferred learning format for your child(ren)/grandchild(ren) this fall? Base: Parents of children age 5-17*

# Americans remain highly uncomfortable with idea of traveling via mass transit, commercial airline, or cruise line if they had to do so "today". Most remain much more comfortable with the idea of traveling independently, locally or over distance.




*Q36 - Regardless of whether or not you usually travel or plan to in the future, how comfortable or uncomfortable would you be with traveling in the following ways if you had to do so today? Base: Total* aytm

# Questions?

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