



Covid-19 Pandemic Impact on US Consumers

W17 | Aug 20-21, 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 seventeenth wave of aytm's Covid-19 Consumer Tracker fielded Thursday, August 20th – Friday, August 21st, 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.

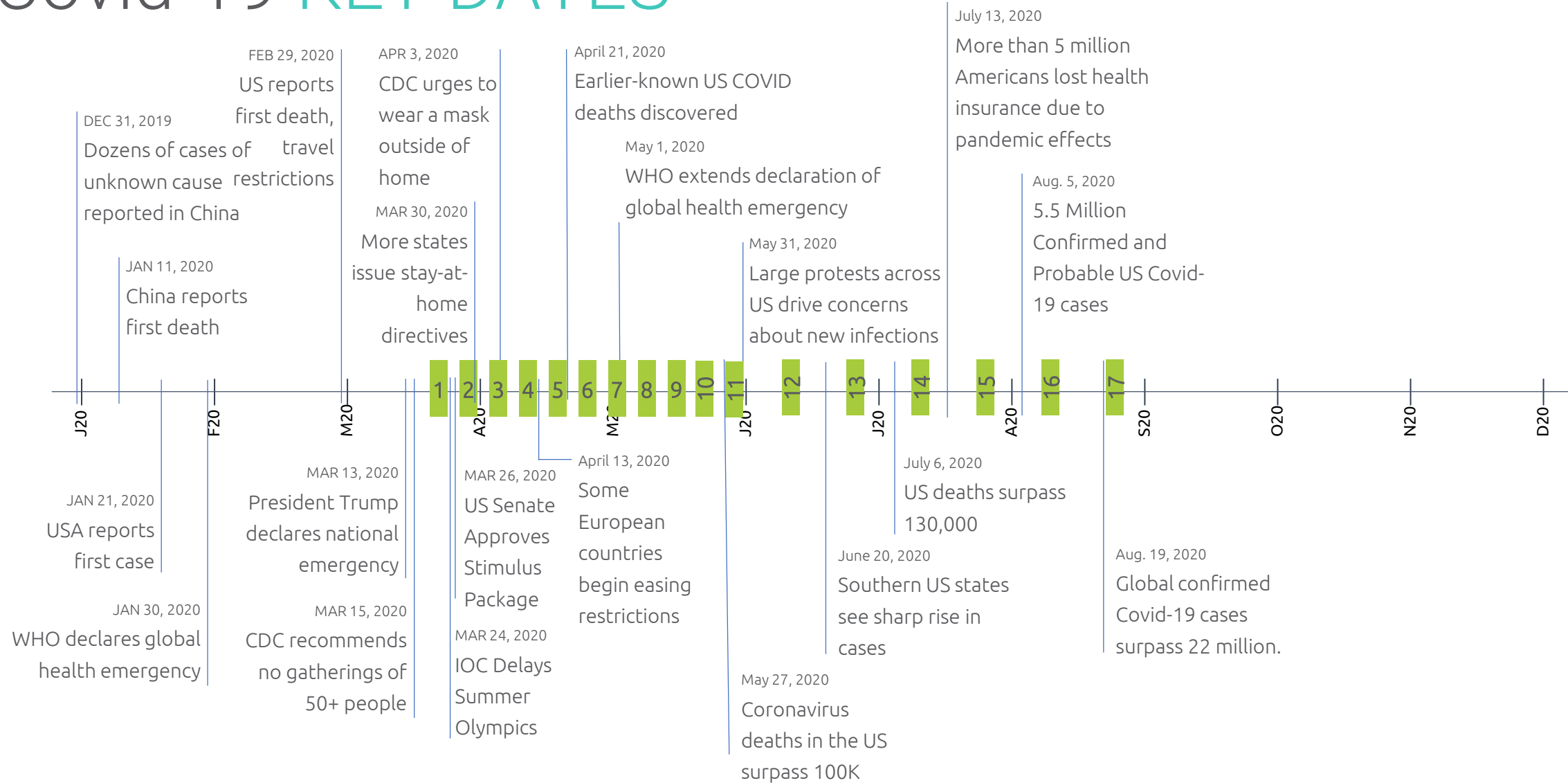
All significance testing is conducted at 95% confidence level with the effective base used as the sample base for statistical calculations (Effective Base = 1,000 for Total sample).

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

Concern levels ease slightly, but Americans remain cautious.

With the summer surge in confirmed Covid-19 cases ebbing, Americans are showing a marginally lower level of pandemic-driven concern overall. However, with pandemic-related news consumption carrying on and long-term effects on daily life taking hold, Americans continue to face anxieties centered around individual health and an uncertain economic future, both at home and nationally. When asked to rank the most concerning issues facing American society today, a vast majority of citizens still place the Covid-19 pandemic easily atop the list.

- Americans continue to worry for the health of more vulnerable older relatives, in particular. Nearly eighty percent are uneasy about how the pandemic could affect the health of an elderly loved one.

The “new normal” continues to take root in the daily lives of American consumers.

Although fewer Americans report *severe* impacts on their daily lives this wave, a majority still say that the pandemic has had some sort of strong negative effect. Americans continue to report everything from upended daily routines due to children and spouses being homebound to total financial deterioration due to job loss or other reductions in earnings.

- In order to deal with the growing economic pressures felt at home, many American consumers continue to reduce their non-essential spending in particular economic sectors including dining, entertainment, and vacation/travel.
- As has been the case since the tracker’s beginning in March, certain product categories face heightened risk of reduced traffic as American consumers scale back their discretionary expenditures, namely: apparel, beauty supplies, and technology products.
- As the Covid-19 pandemic continues to reshape the retail landscape and consumers shift their shopping priorities, brand-switching has become part of the new routine. Consumers continue to seek more affordable options and items to replace products that cannot be found on the shelf.

Even with summer coming to a close and a new school year beginning, most Americans are still weary of large-scale reopening.

With regard to how the pandemic will unfold locally, nationally, and globally over the coming 30 days, Americans show a less-pessimistic outlook this wave when compared to earlier in the summer. And, the time until most feel things will return to “normal” falls slightly from 13 months to 12 months – the first real drop since the tracker’s beginning. Most Americans remain optimistic that they’ll be largely unaffected financially by the crisis. Still, Americans are resistant to the idea that now is the right time to pursue broad “reopening” of the economy, and most remain uncomfortable with the notion of significant public travel. With an eye toward the future, about half of Americans are hopeful for a vaccine and would use one themselves if it were available today, while around one in five would reject such a vaccine.

Wave over Wave Trends

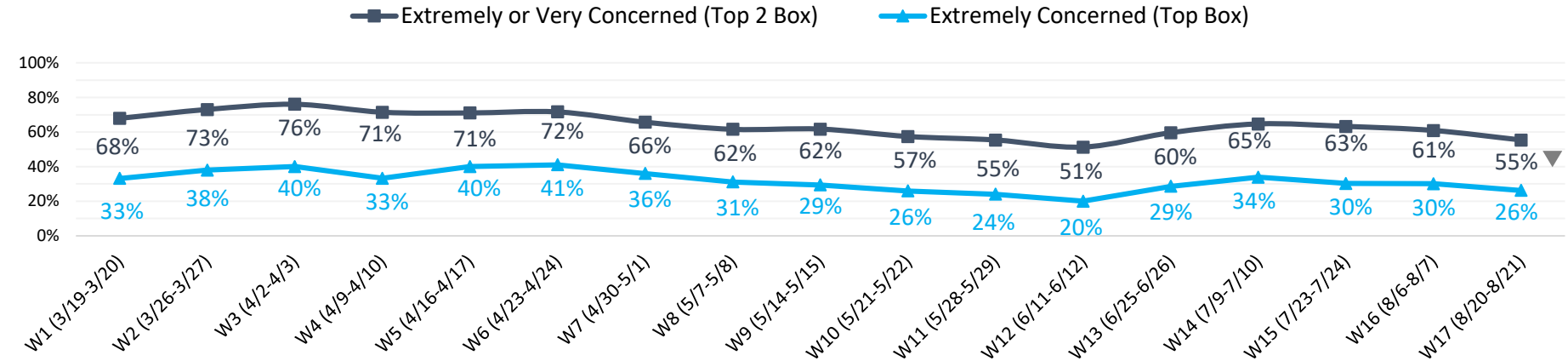
- Covid-19 Awareness, Concern
- Perceived Severity
- Anticipated Change in Next 30 Days
- Employment and Financial Impact
- Estimated “Back to Normal” Timeline



Coronavirus/Covid-19 Concern Level, Perceived Severity

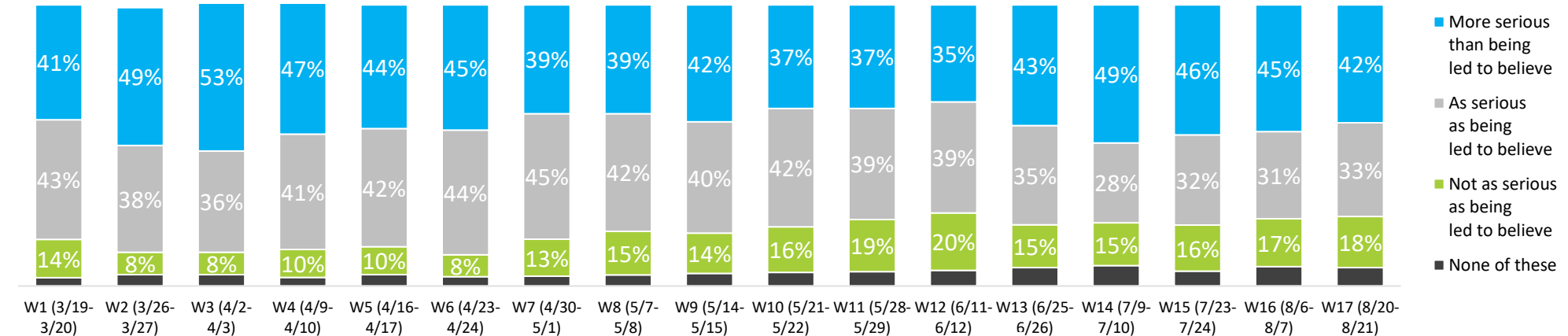
Overall, concern over the Covid-19 pandemic dips slightly in this late-August wave. Just over half of Americans are extremely or very concerned.

Coronavirus/Covid-19 Concern Level



Four in 10 Americans feel the pandemic is more serious than is being represented. A little fewer than one-fifth of the population believes it is less serious.

Coronavirus/Covid-19 Perceived Severity



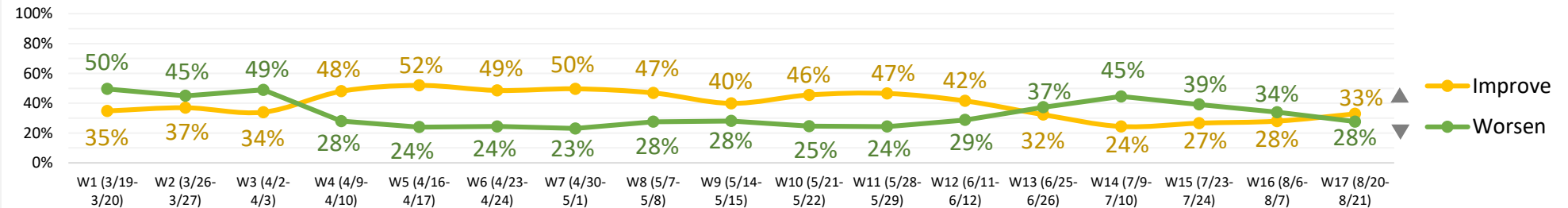
Q7 - Overall, how would you characterize your current level of concern about the Coronavirus/Covid-19 situation? Base: Total

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

Anticipated Change in Coronavirus/Covid-19 Situation

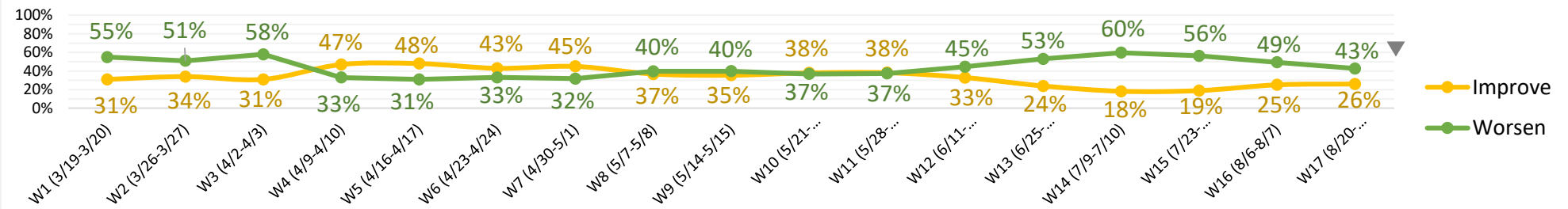
Americans are somewhat more optimistic about how the pandemic will develop in their **local** communities over the next 30 days.

Change Locally in Next 30 Days



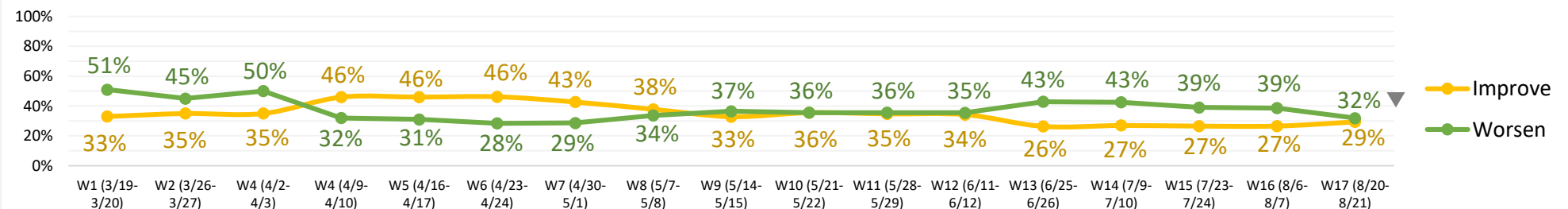
Likewise, Americans are less pessimistic about the **national** 30-day pandemic outlook as well.

Change in US Overall in Next 30 Days



Additionally, fewer Americans are expecting the **global** situation to worsen over the next 30 days, also.

Change Globally in Next 30 Days

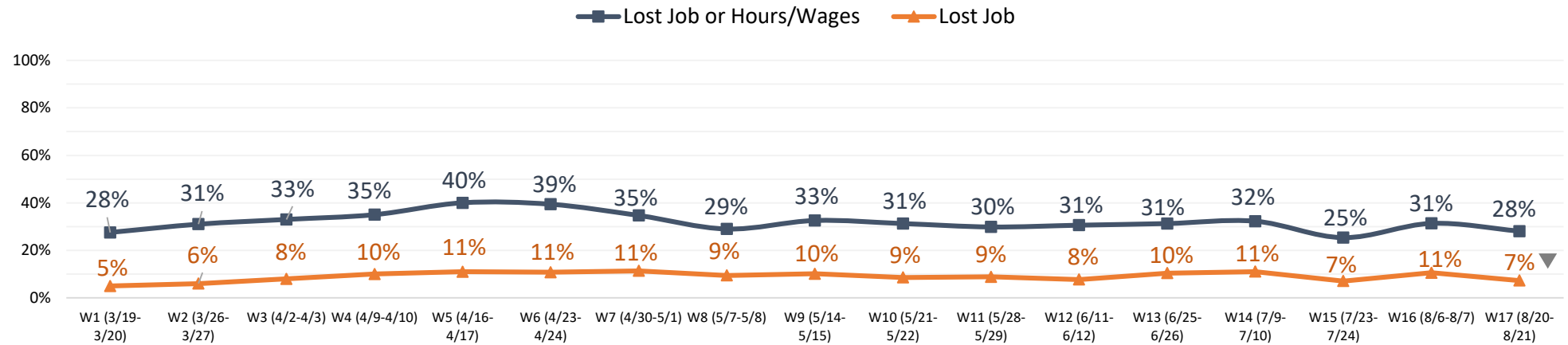


Q22 - Thinking locally, about the US overall, and globally, how do you expect the Coronavirus/Covid-19 situation to change in the next 30 days? Base: Total

Employment, Financial Impact of Coronavirus/Covid-19

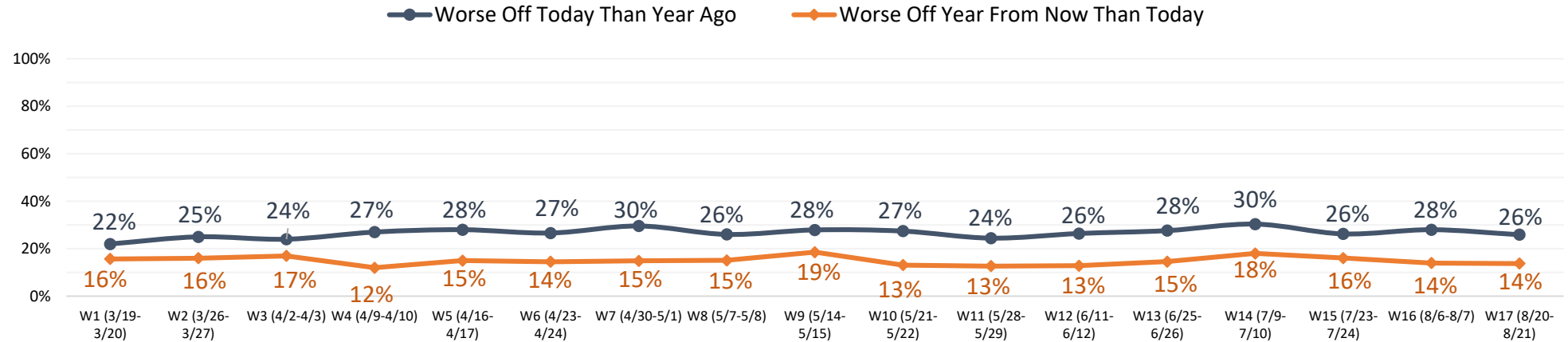
After climbing at the beginning of August, reported job impacts fall back to earlier levels – seven percent of Americans say they have lost a job due to the pandemic.

Coronavirus/Covid-19 Impact on Employment



Steady with previous waves, about one-quarter of Americans say they're worse off today than they were one year ago. By contrast, only about one in seven expect to be worse off one year from now.

Personal Financial State vs. One Year Ago, From Now

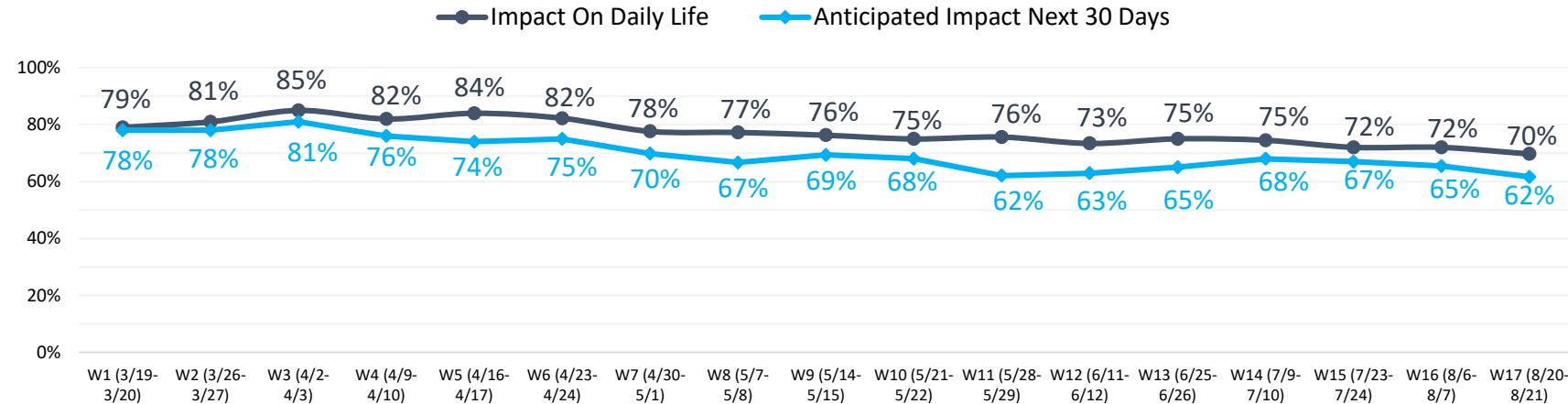


Q19 - At any point, did you lose a job or were your job hours or salary negatively affected by the Coronavirus/Covid-19 situation? Base: Total | Q2 - Would you say that you/your family are better or worse off financially than you were a year ago? / Q3 - Now looking to the future: Do you think one year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

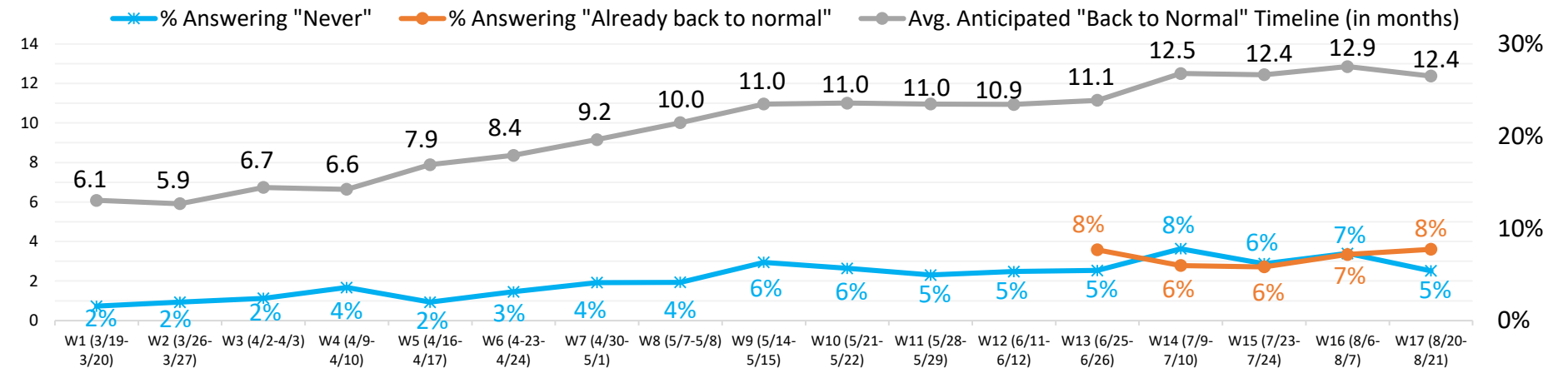
Impact, Estimated Timeline of Coronavirus/Covid-19

About 70 percent of the population still report that the pandemic is impacting their daily life. Just over 60 percent anticipate those impacts to continue throughout the next 30 days.

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: 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

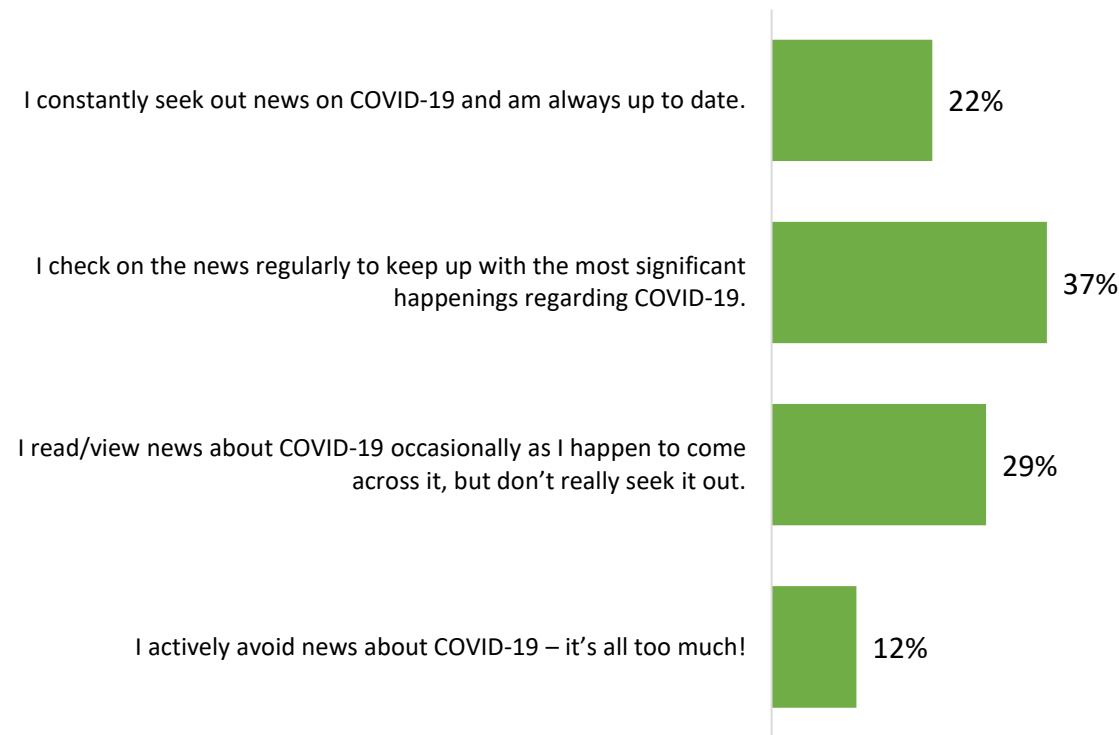
Awareness, Perceptions, Concerns

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

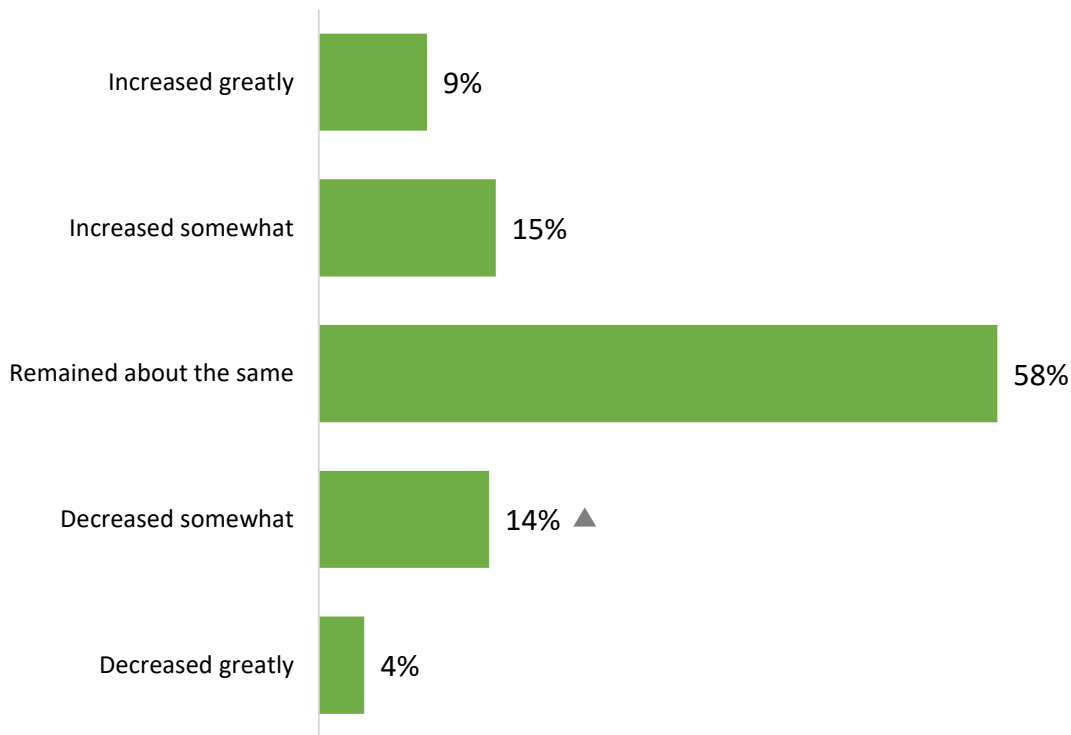


About 60 percent of Americans actively consume news about Covid-19. Most Americans report no major change in the amount of Covid-19-related coverage they've seen since the previous wave.

Attitudes toward News about Covid-19

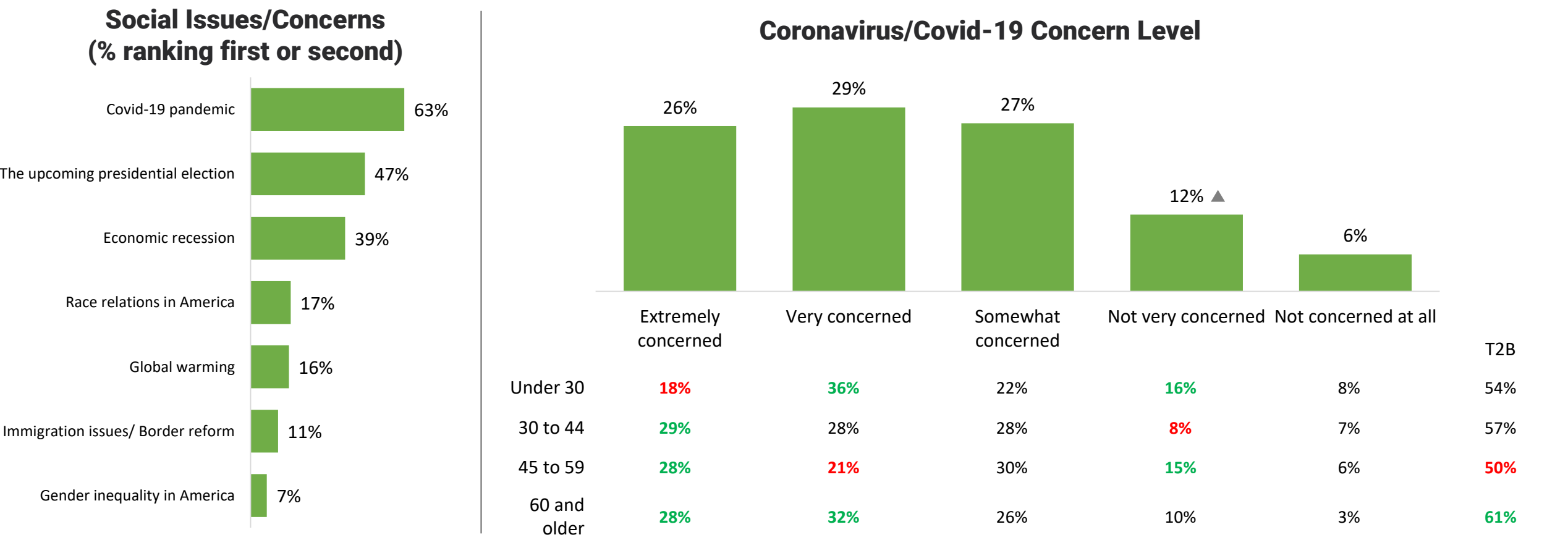


Change in Amount of News Consumed about Covid-19



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

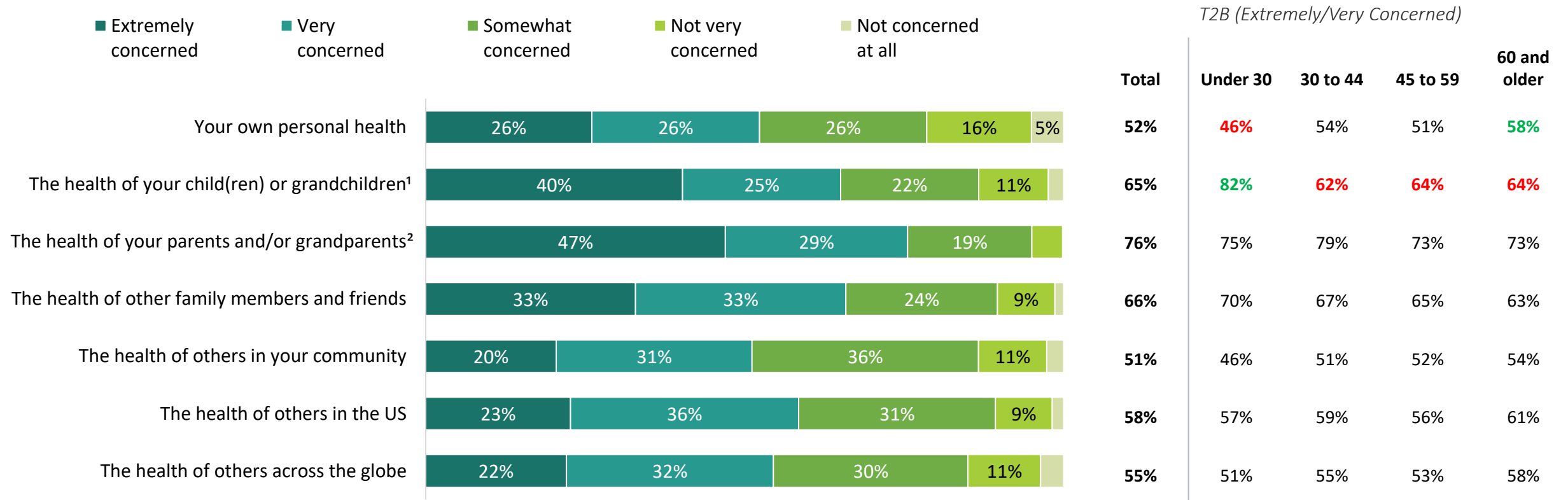
The Covid-19 pandemic continues as the most concerning societal issue overall (from among a list of several current topics). Concern levels remain about the same overall this wave. About six in 10 say they are currently extremely or very concerned.



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

A very gradual decline in concern over the health effects of the Covid-19 pandemic continues this wave, but physical health is still on the minds of most Americans. Worries over the health of elderly relatives continues to outpace individual or personal health concerns.

Coronavirus/Covid-19 Health Concerns

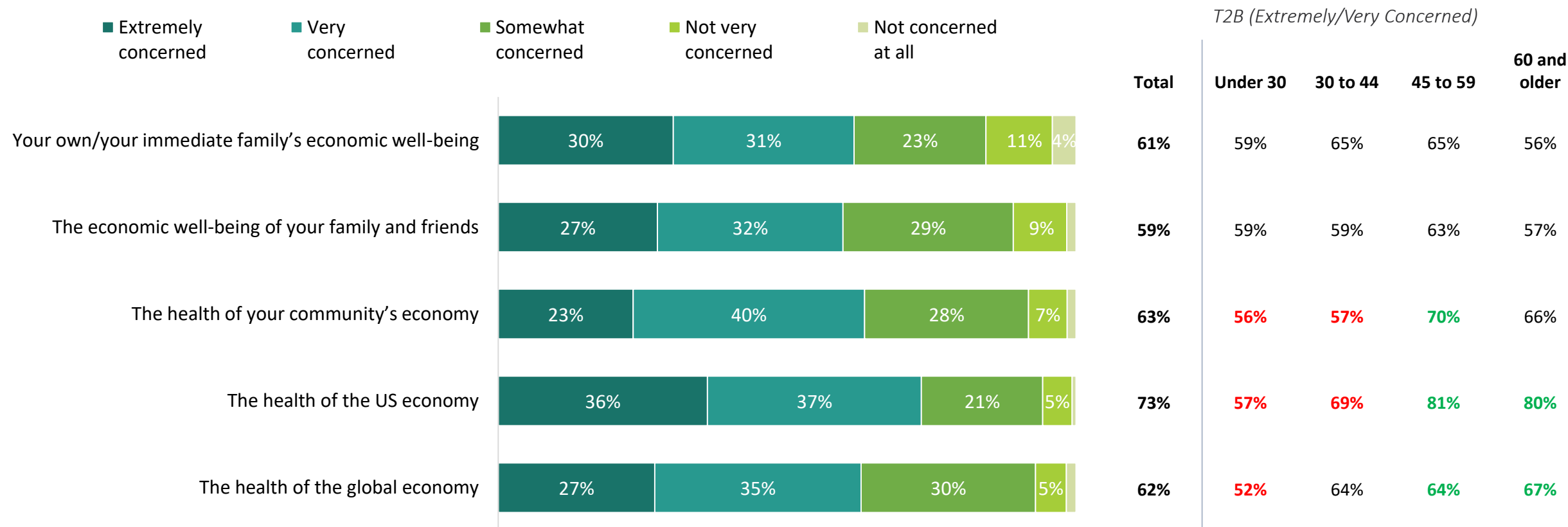


Q8 - To what extent are you concerned about the potential health impact of Coronavirus/Covid-19 at the following levels? Base: Not Very – Extremely Concerned

¹Only shown to those with children or grandchildren; ²Only shown to those with living parents or grandparents

Economic anxieties match health concerns, and Americans remain particularly troubled for the US national economy.

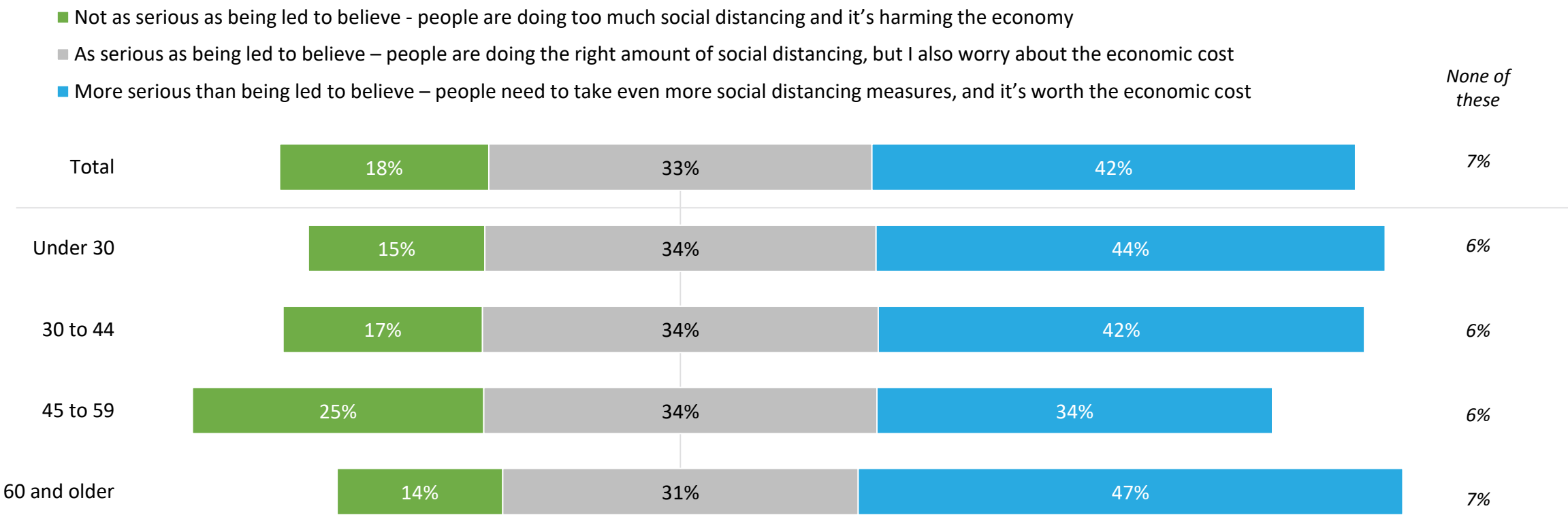
Coronavirus/Covid-19 Economics Concerns



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

A gradual increase in the number of Americans who believe the pandemic is not as serious as is being represented continues this wave, but this group is easily outnumbered by those who believe the situation is worse.

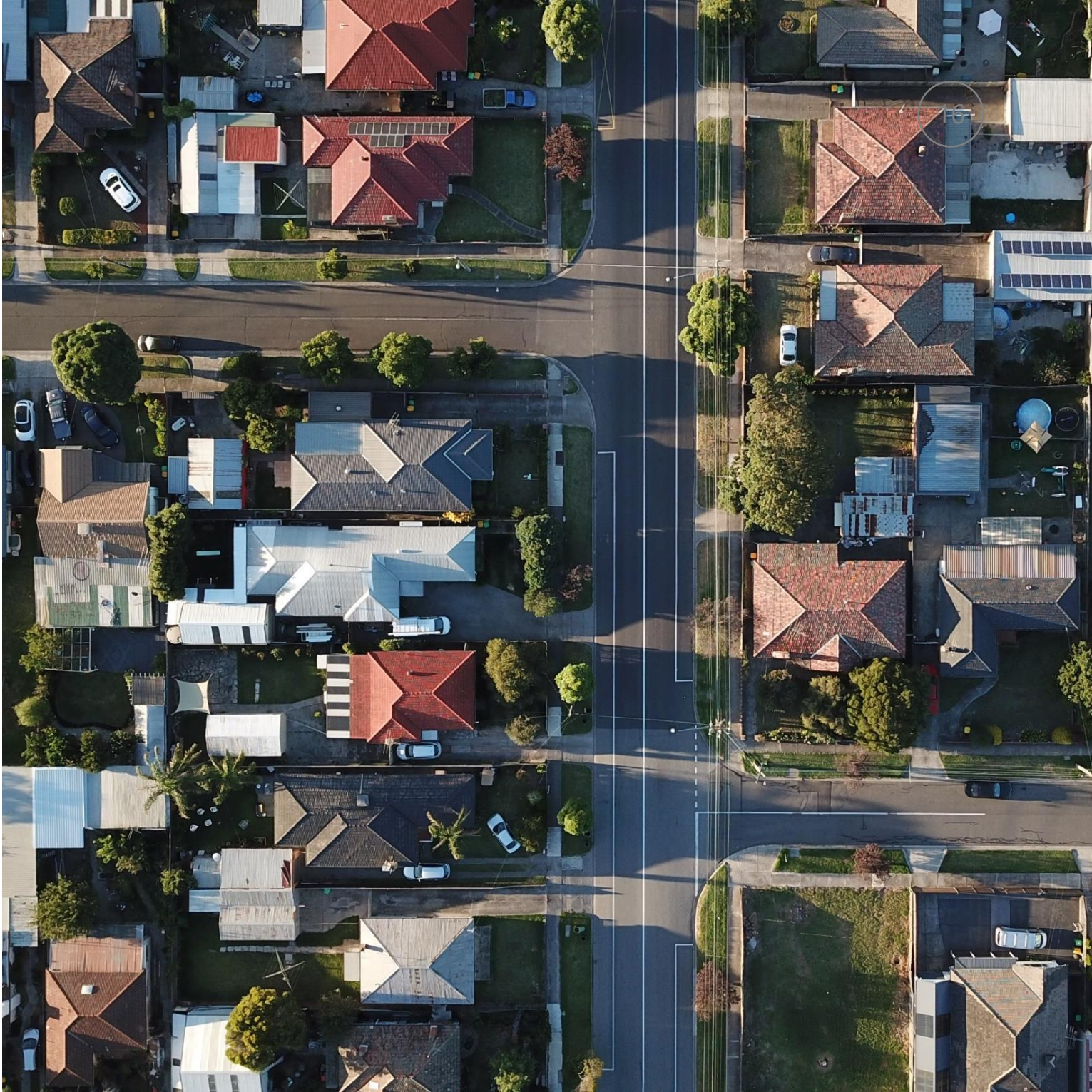
Coronavirus/Covid-19 Perceived Severity



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

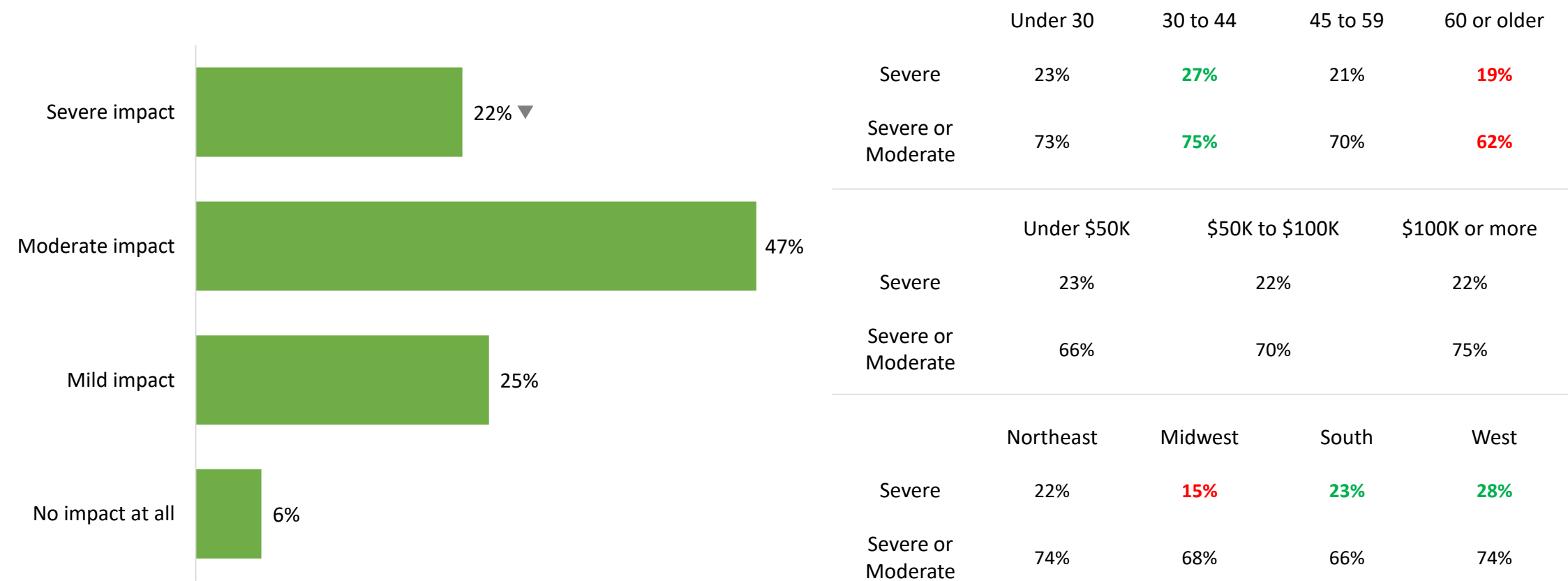
Impact on Daily Life

- Overall Impact
- Behavioral Reactions



Fewer Americans are reporting severe impacts from the pandemic this wave, but most say that Covid-19 has impacted their daily lives in some way. Those in the Midwest report less severe impacts overall than those in other regions.

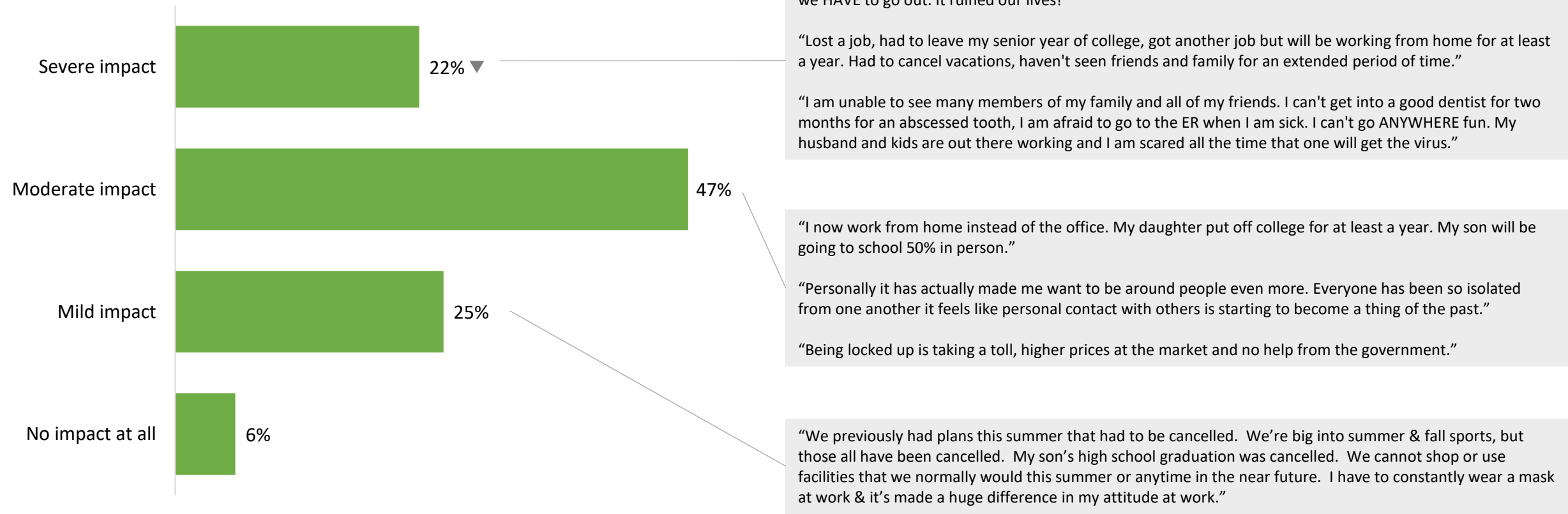
Coronavirus/Covid-19 Impact on Daily Life



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

Job loss, critical health concerns, and pressures brought on by significant disruptions due to the pandemic are the primary drivers of Covid-19 related stress. Those who say impacts have been less severe are likely to speak more to inconveniences and unavailable luxuries.

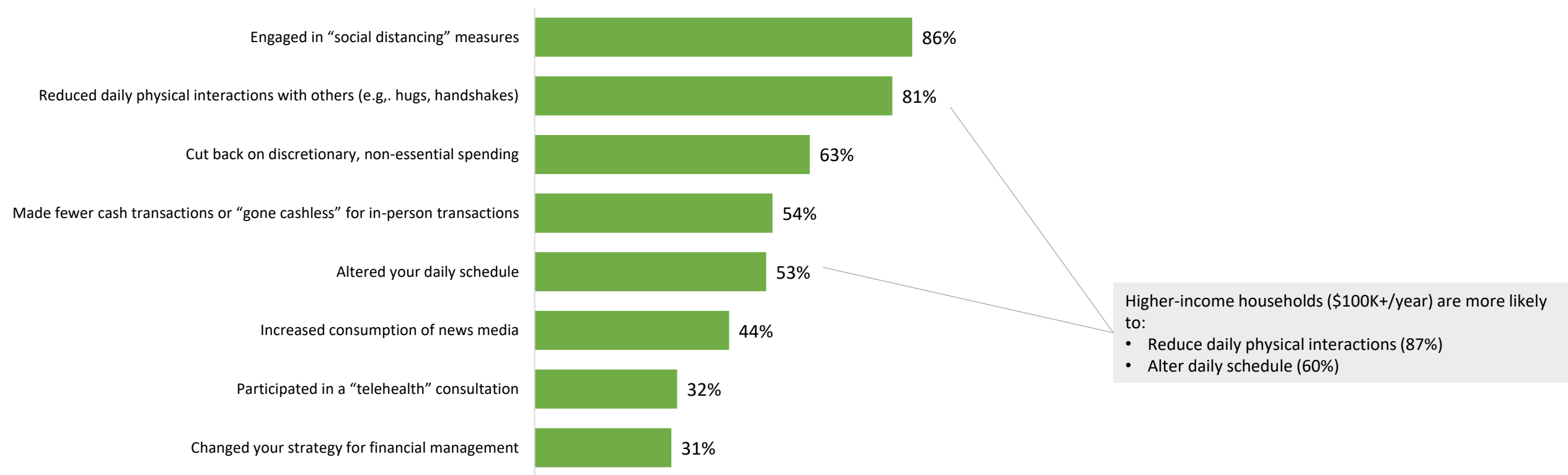
Coronavirus/Covid-19 Impact on Daily Life



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 no significant shift in the behavioral changes Americans are experiencing this wave as they manage the pandemic's unique challenges. Most are avoiding groups when possible, and cuts to discretionary spending continue among most consumers.

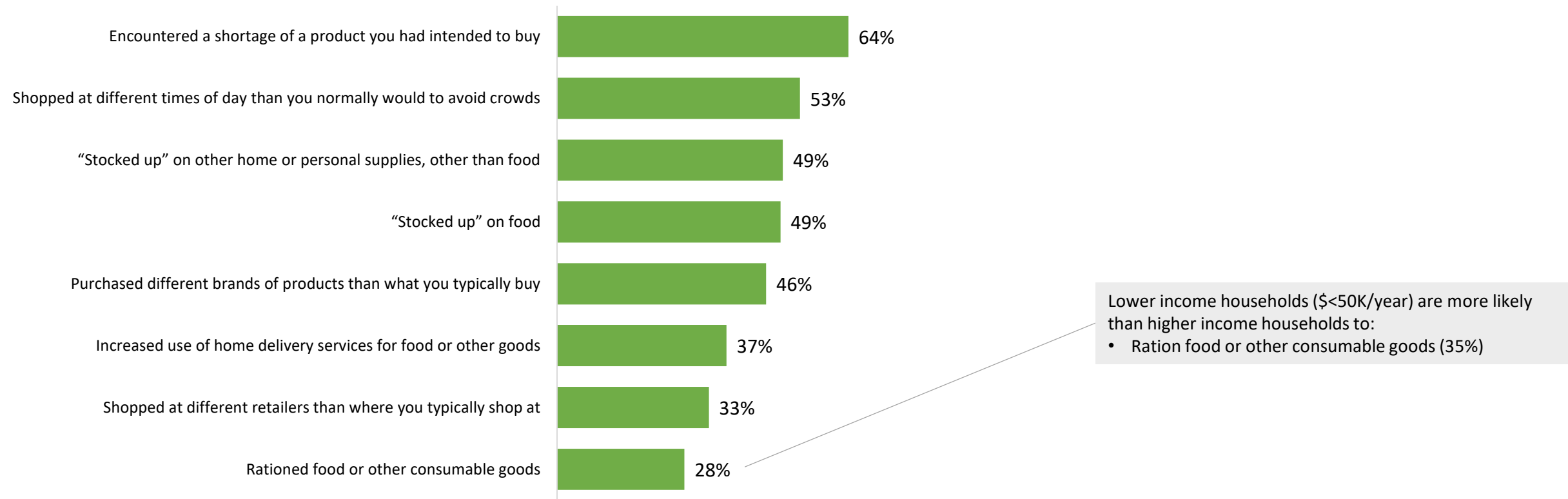
Behavioral Changes due to Coronavirus/Covid-19*



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

Around two-thirds of American consumers are still facing product shortages when shopping for common items. Half of Americans continue to change how they shop by altering the time of the day they go out, stocking up on items, or purchasing different brands than usual.

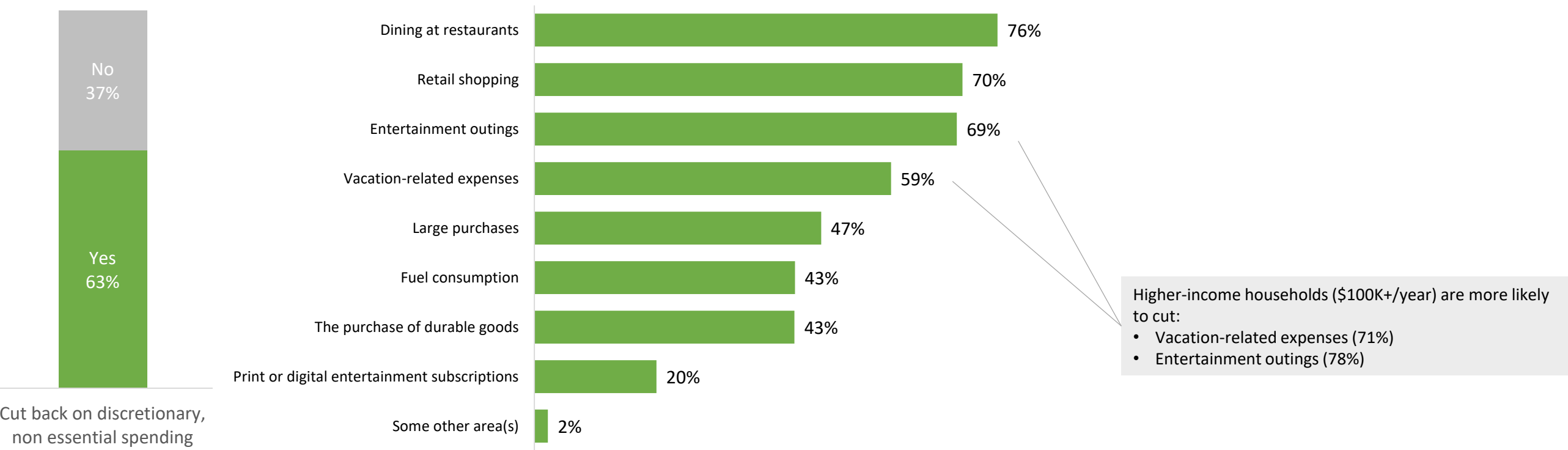
Shopping, Purchasing Experiences due to Coronavirus/Covid-19*



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

Among the two-thirds who have reduced spending within the past week due to Covid-19, dining, shopping, and other entertainment outings are the first expenditures to be cut. Over half of Americans are reducing their spend on vacations.

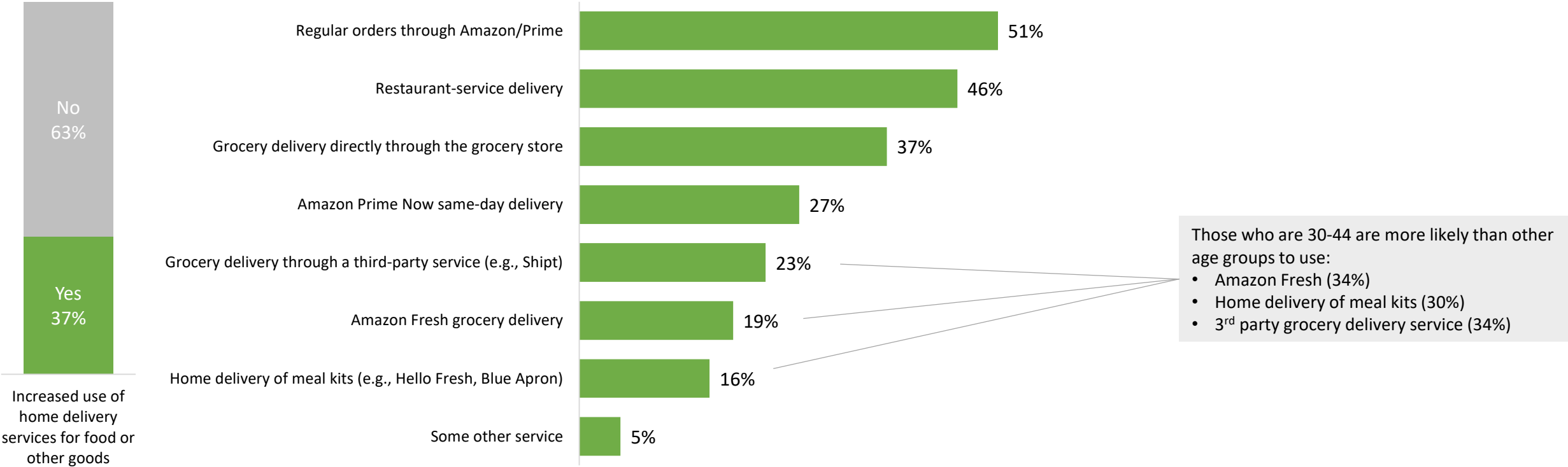
Areas of Reduced Discretionary Spending due to Coronavirus/Covid-19*



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)

Nearly four in 10 American consumers continue to increase their use of home-delivery services during the pandemic. Services such as Amazon Prime, restaurant delivery providers, 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)

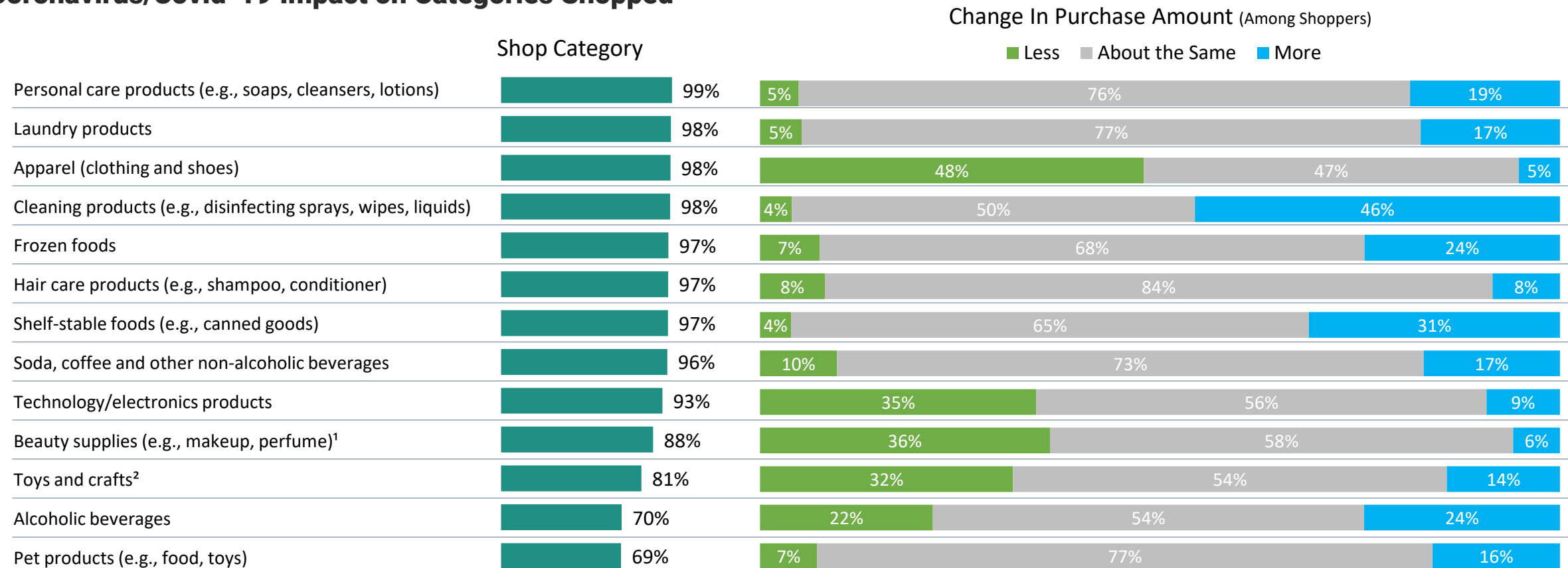
Changing Purchase Behaviors

- Category Purchase Volume
- Brand Loyalty



As consumers search for ways to reduce spending, durable and luxury goods are the product categories most at risk for reduced traffic. As has been the case since the beginning of the tracker in March, cleaning products and shelf-stable foods continue to benefit from increased purchase rates.

Coronavirus/Covid-19 Impact on Categories Shopped

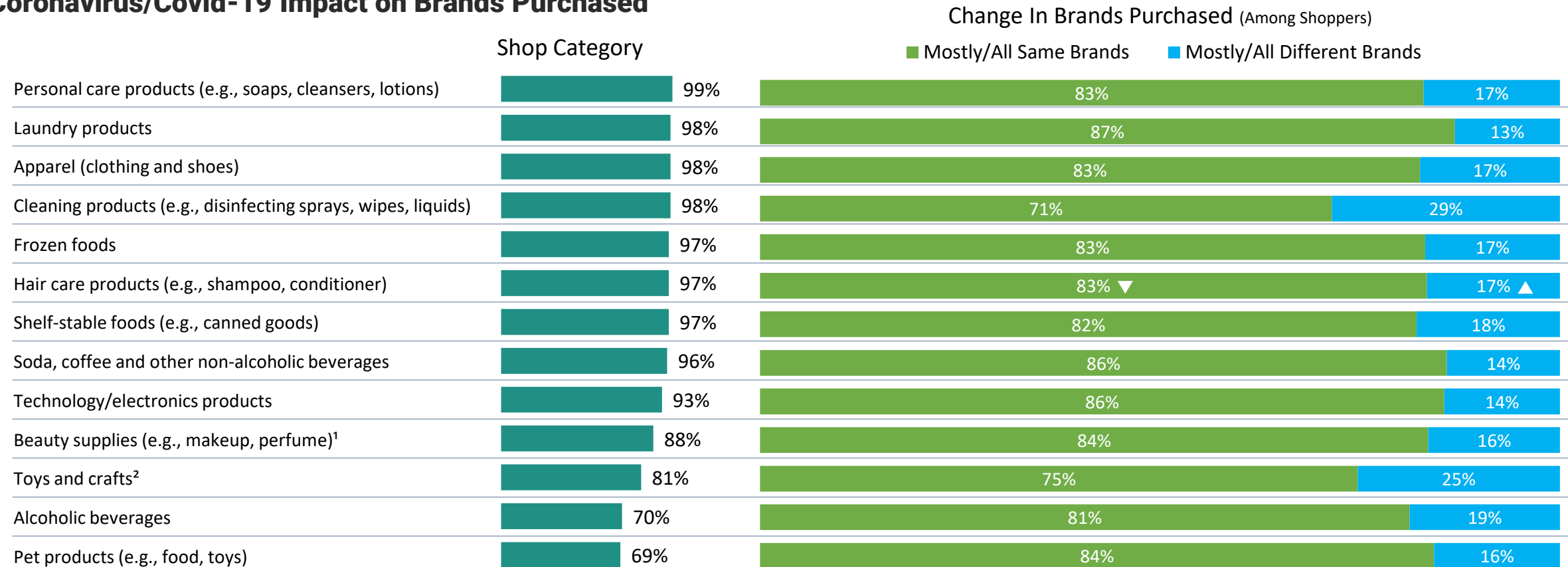


Q17 - Since the Coronavirus/Covid-19 situation began, have you purchased more, less, or about the same amount that you typically purchase in each category? Base: Total

¹Only shown to females; ²Only shown to those with children or grandchildren ages 0-17

Brand switching continues to take hold in all key product categories, especially in cleaning products and toys and crafts.

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: Shop Category (Q17)

¹Only shown to females; ²Only shown to those with children or grandchildren ages 0-17

While product affordability continues to drive a significant amount of brand-switching across most categories, product shortages are also a culprit in the cleaning supplies and shelf-stable foods categories. Consumers also continue to shop alternative brands simply for more variety as well.

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

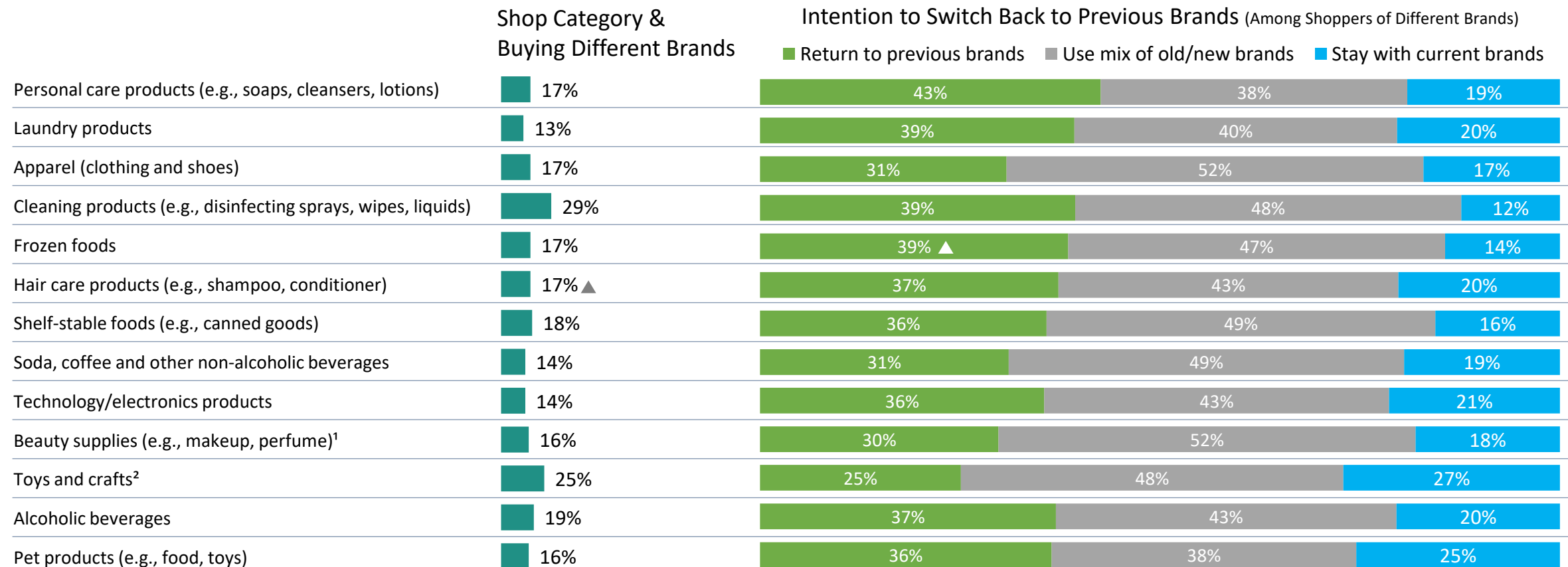
	Shop Category & Buying Different Brands	Preferred brand(s) is not available	Buying more affordable brands	Just to have more variety	Switching to higher quality/better performing options	Some other reason(s)
Personal care products (e.g., soaps, cleansers, lotions)	17%	35%	43%	27%	13%	2%
Laundry products	13%	40%	45%	27%▲	15%	0%
Apparel (clothing and shoes)	17%	20%	49%	33%	12%	3%
Cleaning products (e.g., disinfecting sprays, wipes, liquids)	29%	58%	27%	20%	15%	3%
Frozen foods	17%	27%	46%	33%	14%	0%
Hair care products (e.g., shampoo, conditioner)	17%▲	29%	41%	31%	18%	0%
Shelf-stable foods (e.g., canned goods)	18%	45%	39%	32%	8%	2%
Soda, coffee and other non-alcoholic beverages	14%	24%	48%	36%	12%	1%
Technology/electronics products	14%	20%	43%	24%	24%	6%
Beauty supplies (e.g., makeup, perfume) ¹	16%	28%	49%	28%	10%	3%
Toys and crafts ²	25%	22%	33%	45%	18%	9%
Alcoholic beverages	19%	14%	43%	41%	18%	0%
Pet products (e.g., food, toys)	16%	31%	44%	22%	20%	1%

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)

¹Only shown to females; ²Only shown to those with children or grandchildren ages 0-17

Among those who are purchasing different brands from what they usually buy, a number of consumers expect to continue purchasing those new brands even after the pandemic subsides. “new” brands have particularly taken hold in toys and crafts, pet products, personal care, and laundry products.

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: Shop Category (Q17)

¹Only shown to females; ²Only shown to those with children or grandchildren ages 0-17

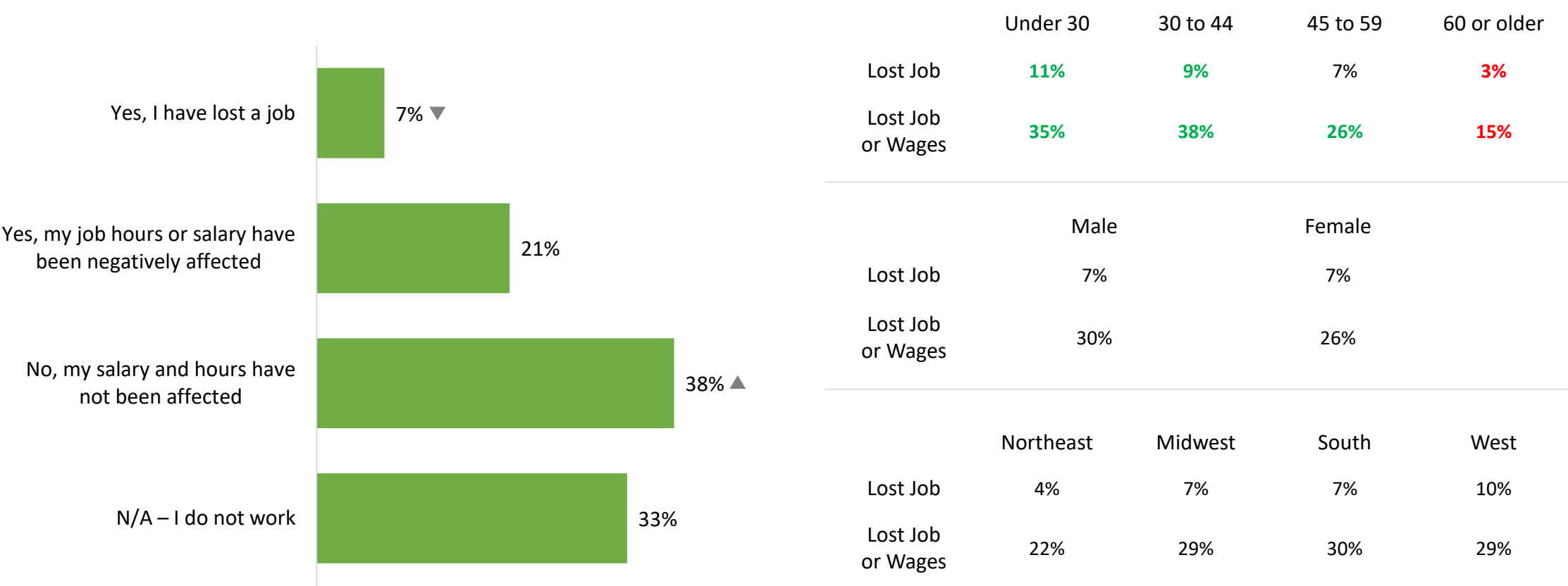
Employment Impact

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



Job losses related to the pandemic’s effects are marginally lower this wave, but nearly three in 10 Americans have experienced some sort of negative impact to their earnings. The younger generations are more likely to have encountered these challenges.

Coronavirus/Covid-19 Impact on Employment

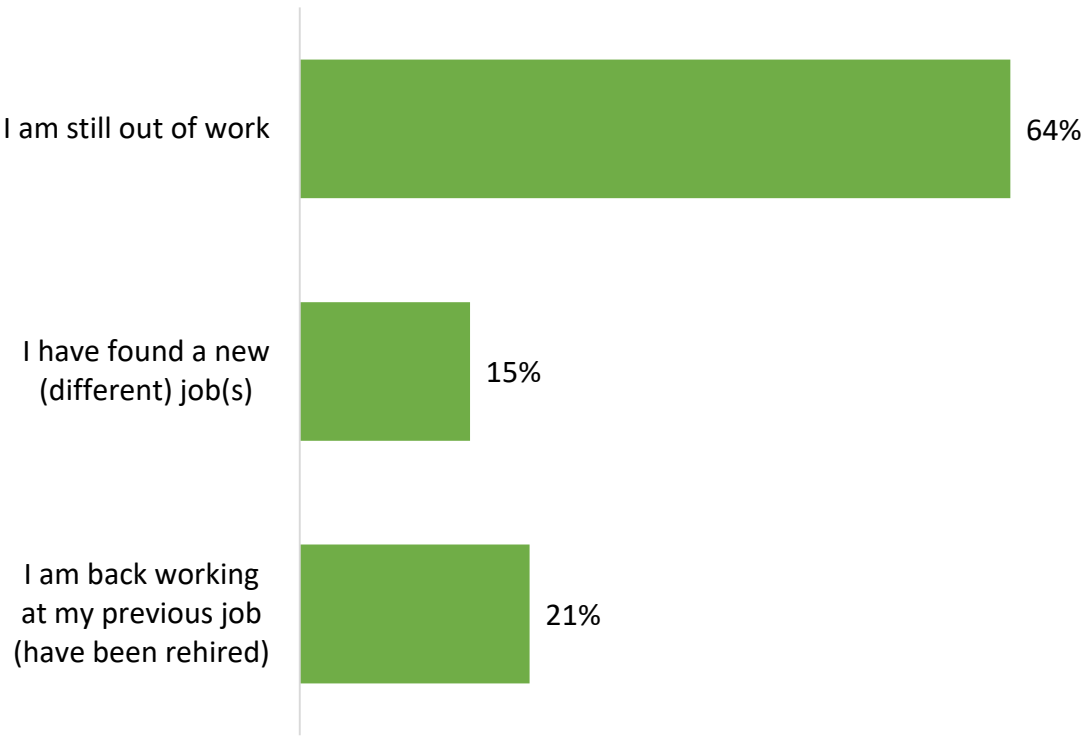


Q19 - At any point, did you lose a job or were your job hours or salary negatively affected by the Coronavirus/Covid-19 situation? Base: Total

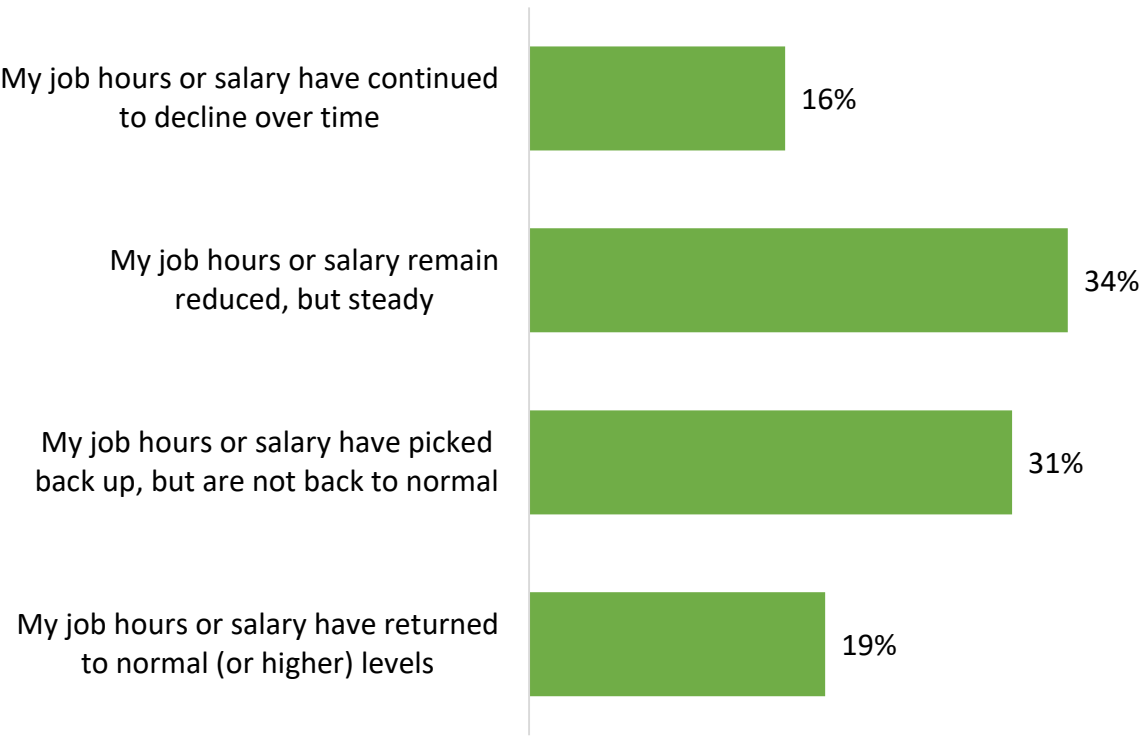


Two-thirds of Americans who have lost a job remain out of work. Among those who experienced a reduction of pay in some form, only about one in five has regained those losses so far.

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

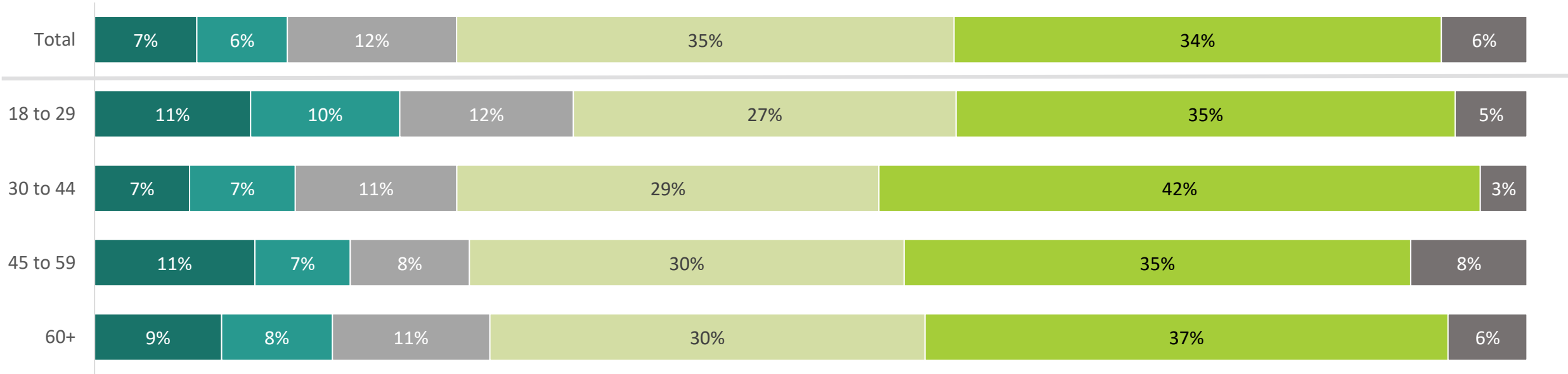
- Consumer Confidence
- Projected Impact
- Anticipated Recovery Time



There is no change this wave in terms of how Americans view plans for reopening. As the summer comes to an end, most feel it is still too early to begin wide-scale economic reopening.

Perceptions of “Reopening”

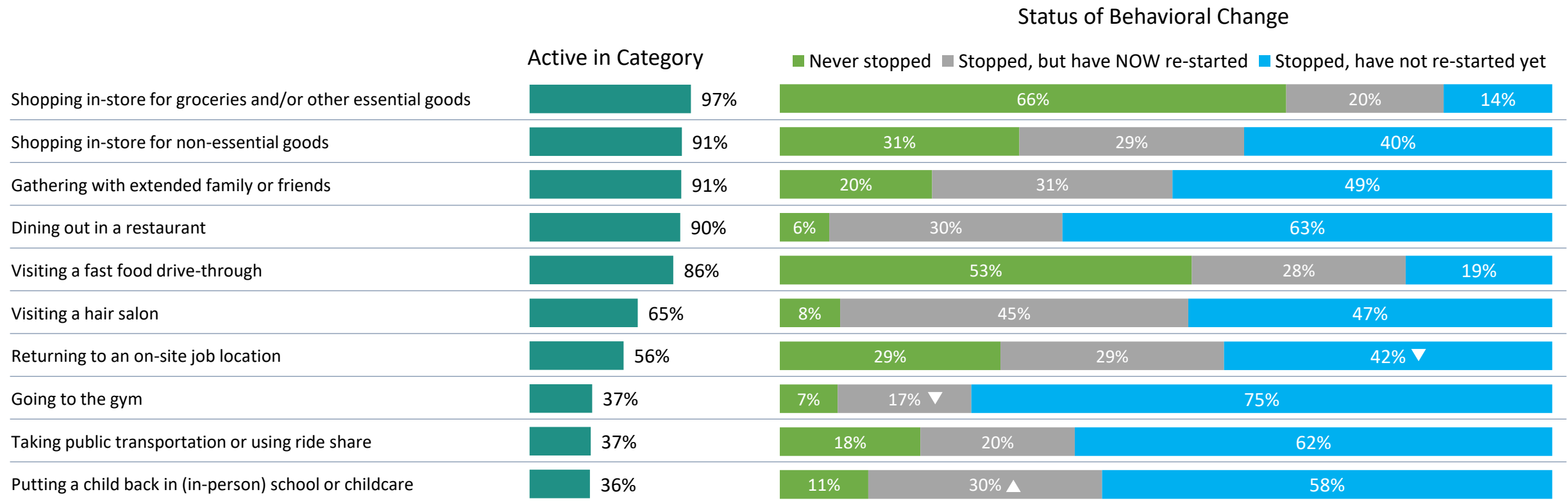
- Stay-at-home guidelines never should have been adopted in the first place.
- Stay-at-home guidelines should have been eased already.
- It's the right time to ease stay-at-home guidelines and reopen, and we need to prioritize getting the economy back up and running as soon as possible.
- It's the right time to ease stay-at-home guidelines and begin to reopen, but we need to do so slowly to prioritize public health and safety.
- It's too early to ease stay-at-home guidelines and to reopen businesses.
- Not sure/no opinion



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

Americans are less likely to have stopped certain daily activities than others – especially shopping in-store for common needs and visiting a fast food drive-through. Conversely, some activities remain largely on-hold; namely, dining out, going to the gym, using public transportation, and returning children to daycare.

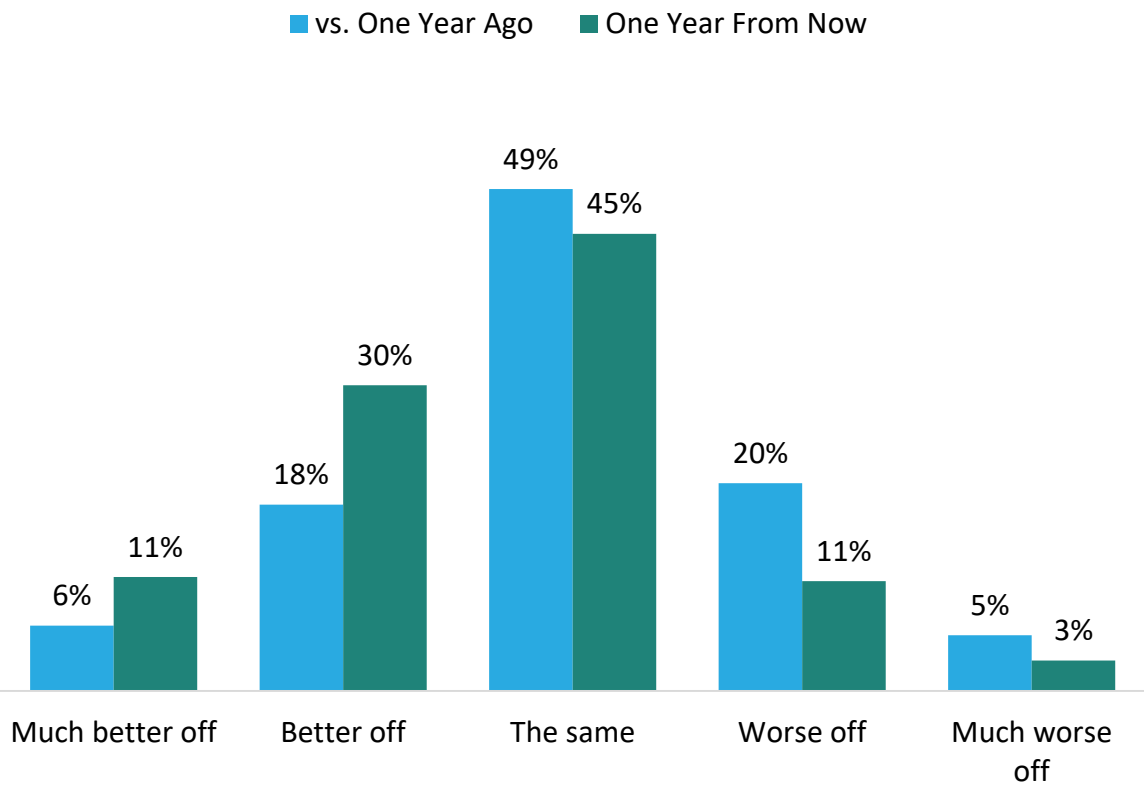
Behavioral Change as Communities Reopen



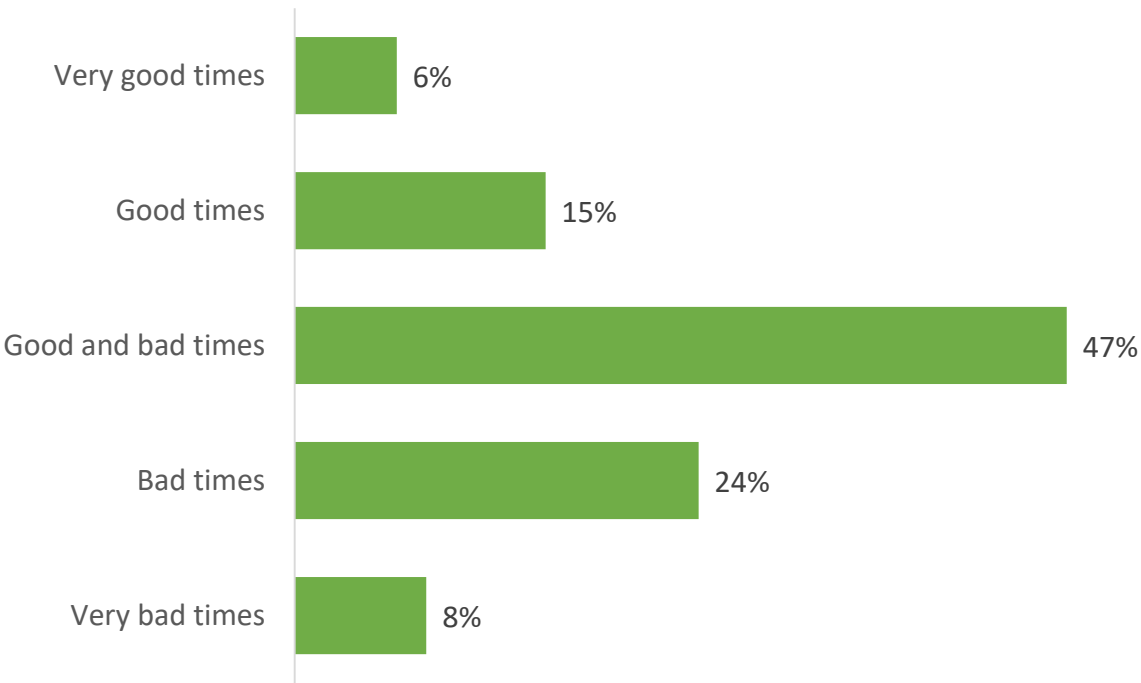
Q35 - As communities reopen, we are interested in understanding how people's behaviors may be changing. For each activity below, please indicate if you never stopped engaging in the behavior due to Covid-19, you stopped due to Covid-19 and have not re-started, you stopped but now have started engaging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

Americans' long-term *personal* financial outlook remains unaffected this wave, as most still expect to be the same or better off one year from now. More generally, Americans remain sure that the US business climate will experience some ups and downs over the coming year.

Personal Financial State vs. One Year Ago, From Now



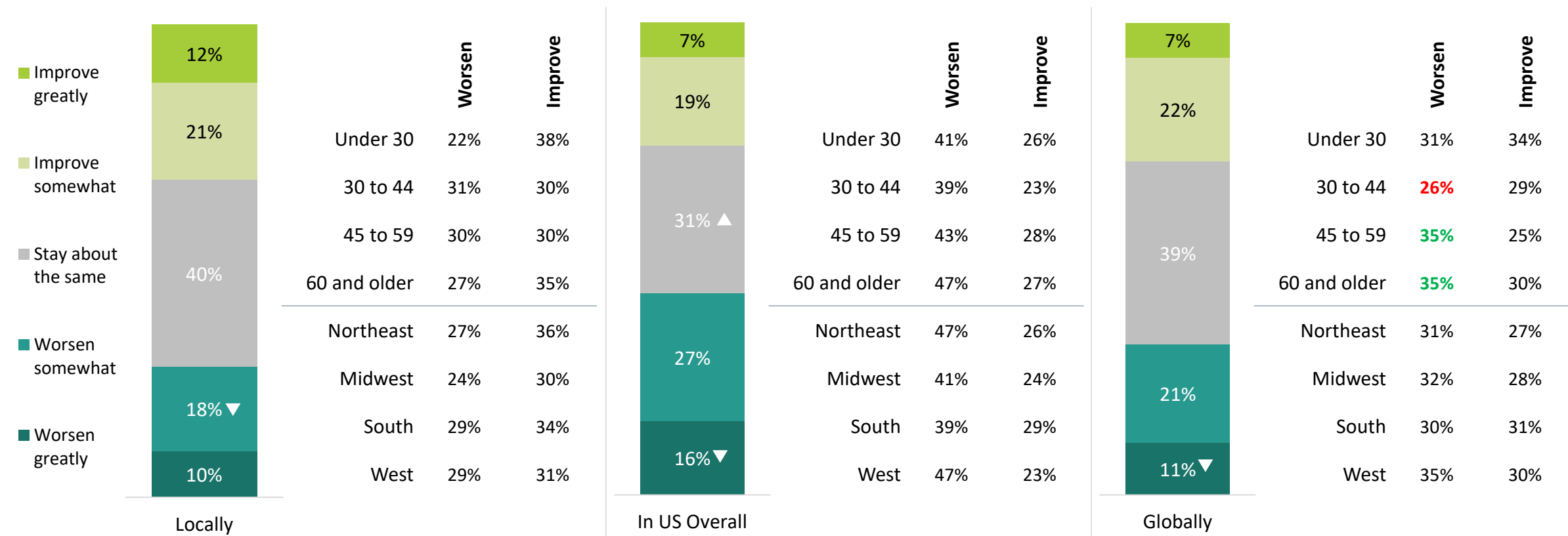
US Business Financial State Over Next 12 Months



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 pandemic outlook is somewhat less pessimistic at the local, national, and global levels this wave. About one-third of Americans expect the situation to improve in their local communities in the next 30 days, though a similar portion expect it to worsen.

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

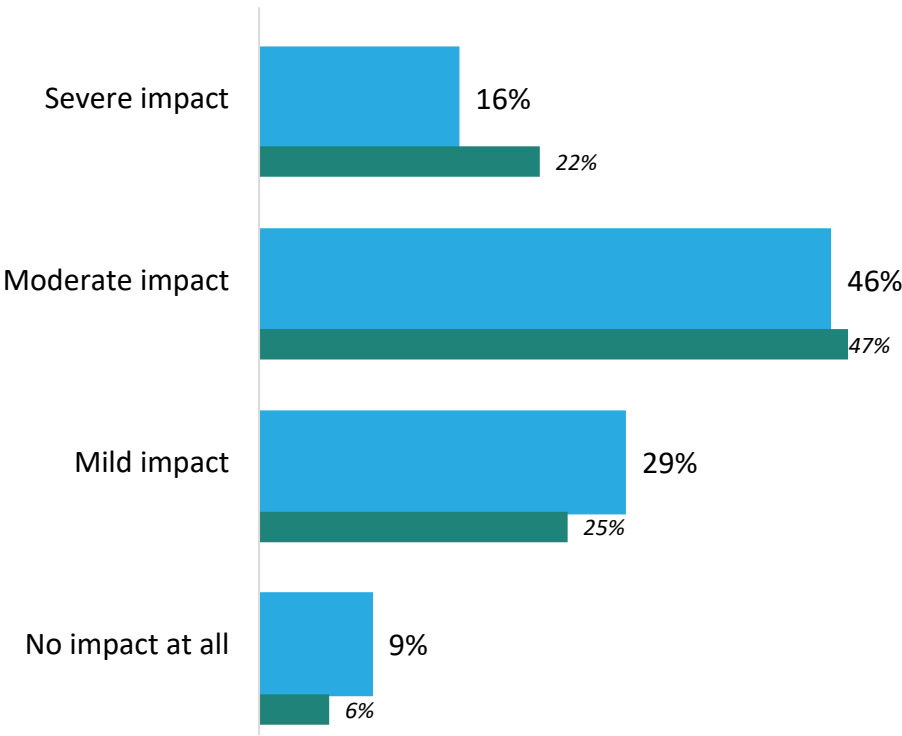


Q22 - Thinking locally, about the US overall, and globally, how do you expect the Coronavirus/Covid-19 situation to change in the next 30 days? Base: Total

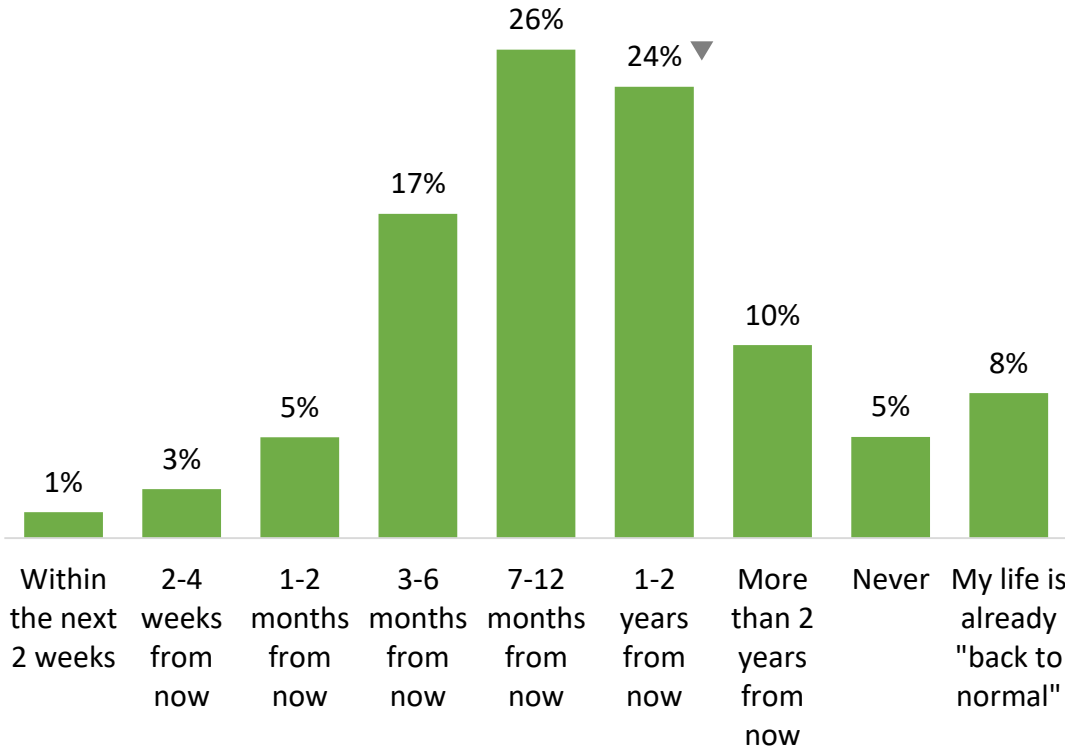
Two-thirds of Americans expect a severe or moderate impact on their daily lives over the coming 30 days, and most don't expect things to return to "normal" for about a year.

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

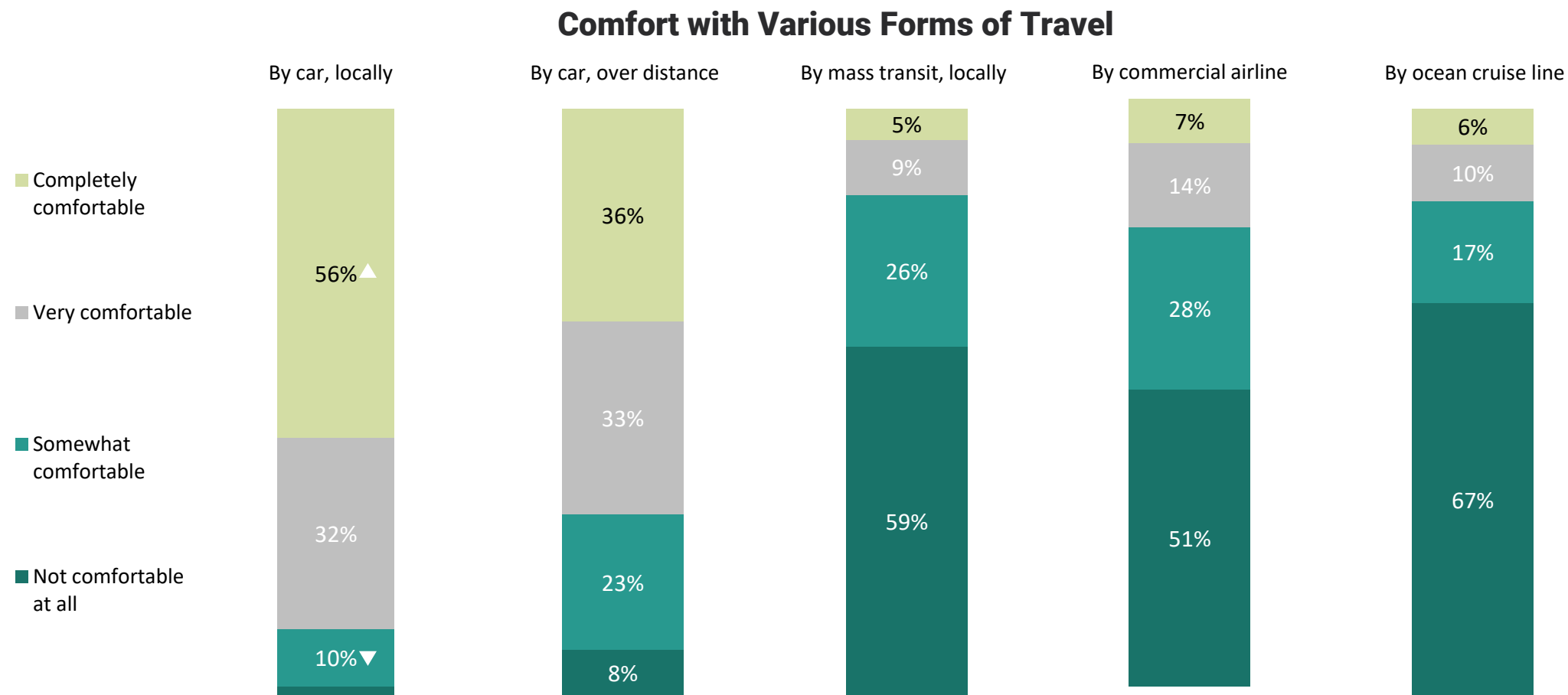
Q24 - What is your best guess about how long, if at all, it will take before your life is "Back to Normal" after Coronavirus/Covid-19? Base: Total

Pulse Topics

- Comfort with Travel
- Vaccine Interest



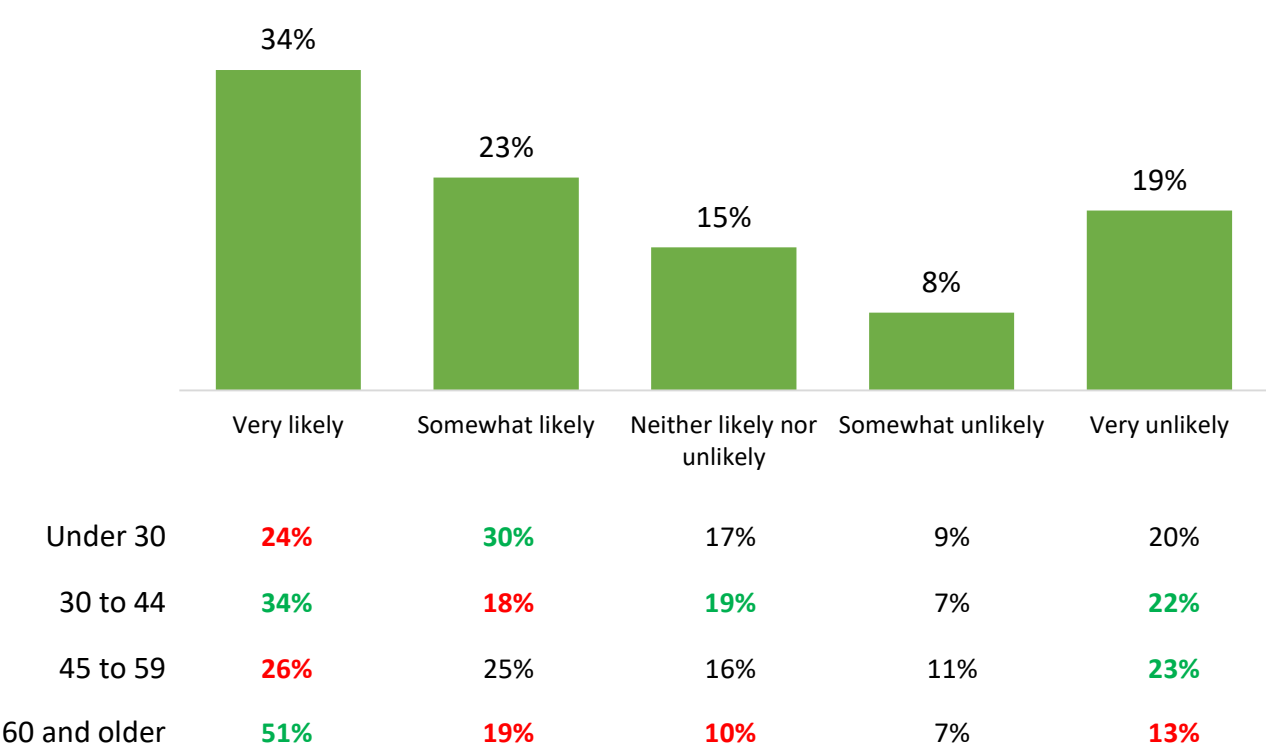
Americans grow slightly more comfortable with traveling locally by car this wave, but most still show no intent to travel via mass-transit.



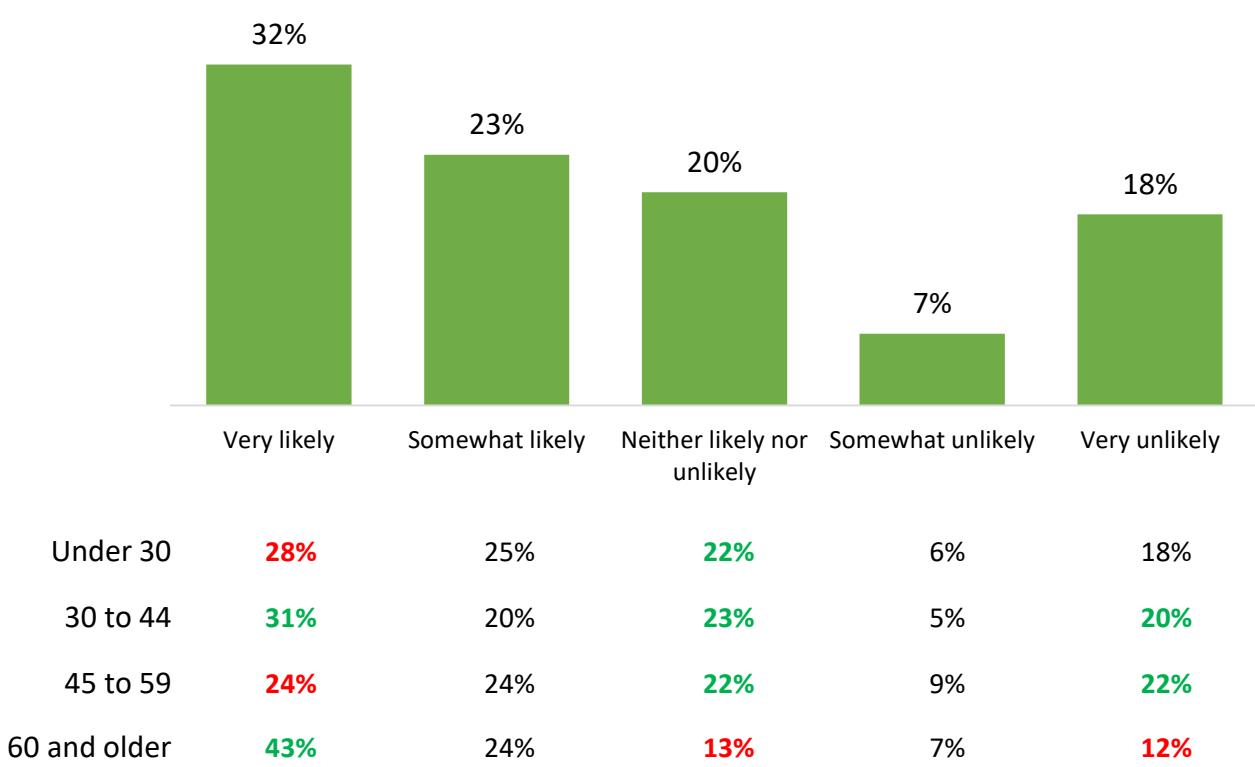
Q36 - Regardless of whether or not you usually travel or plan to in the future, how comfortable or uncomfortable would you be with traveling in the following ways if you had to do so today? Base: Total

There is no shift in consumers' attitudes toward a hypothetical Covid-19 vaccine this wave. Over half would be somewhat or very likely to get the vaccine themselves or encourage others to get it, while about one in four remain unlikely to do so.

Intention of Getting Vaccine When Available



Intention of Encouraging Others to Get Vaccine When Available



Q40 - If or when a proven vaccine against Coronavirus/Covid-19 becomes available, how likely or unlikely will you be to get the vaccine for yourself, and to encourage close friends and family to get the vaccine?

Questions?



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