



Covid-19 Pandemic Impact on US Consumers

W18 | September 3rd – Sep 4th, 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 eighteenth wave of aytm's Covid-19 Consumer Tracker fielded Thursday, September 3rd– Friday, September 4th, 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.

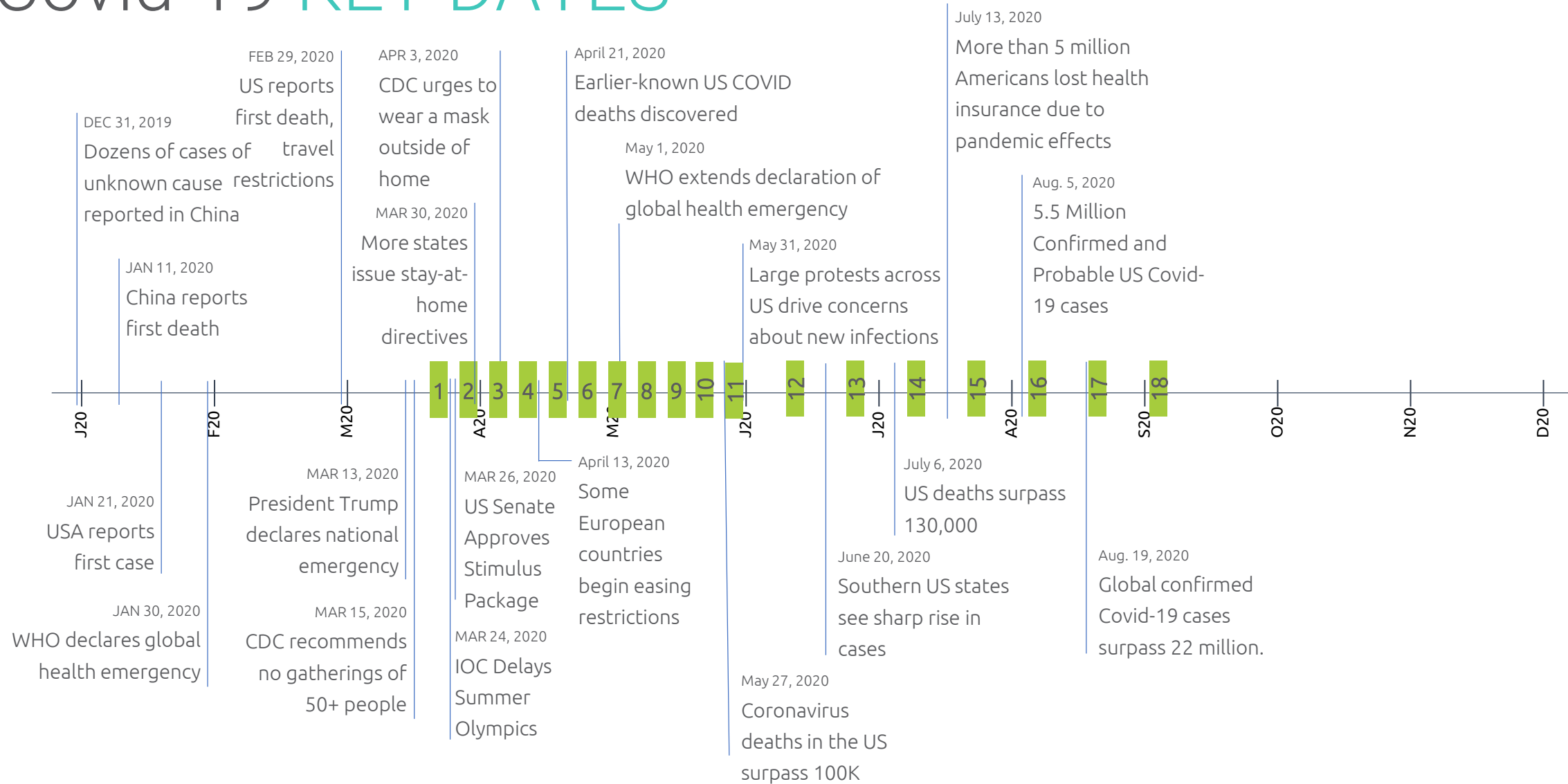
All significance testing is conducted at 95% confidence level with the effective base used as the sample base for statistical calculations (Effective Base = 1,000 for Total sample).

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 Wave 18 KEY FINDINGS

- Concern over the Covid-19 pandemic is consistent with levels seen earlier in the summer. One quarter of Americans say there are *extremely* concerned about the outbreak, and another third are *very* concerned,
 - Only about thirty percent of Americans feel the Covid-19 situation will improve in their *local* communities over the coming 30 days, and a slightly lower percentage expects improvements in the *national* situation.
 - With concern levels flattening, a majority of Americans – three-quarters – continues to report that the pandemic has had a severe or moderate impact on their daily lives. The oldest generations of Americans are likely to report somewhat less severe levels of disruption.
 - Personal health concerns, the loss of loved ones, and financial burden resulting from job loss and reduced pay all weigh heavily on the minds of those whose lives have been most severely altered by the pandemic.
 - In line with previous waves, just under 10 percent of Americans report experiencing job loss, and another quarter say their income has been negatively affected in other ways due to Covid-19.
- Most Americans remain reluctant to resume any of the normal activities that were put on hold due to the pandemic, such as dining out, going to the gym, or using public transportation.
 - One-third of Americans continue to oppose any level of community reopening, and another third only support limited reopening of certain economic sectors under the condition that public health be the top priority.
- While most Americans would be open to using a vaccine for Covid-19 if it were available today, this wave brings a significant increase in the number of those who would oppose such a vaccine.

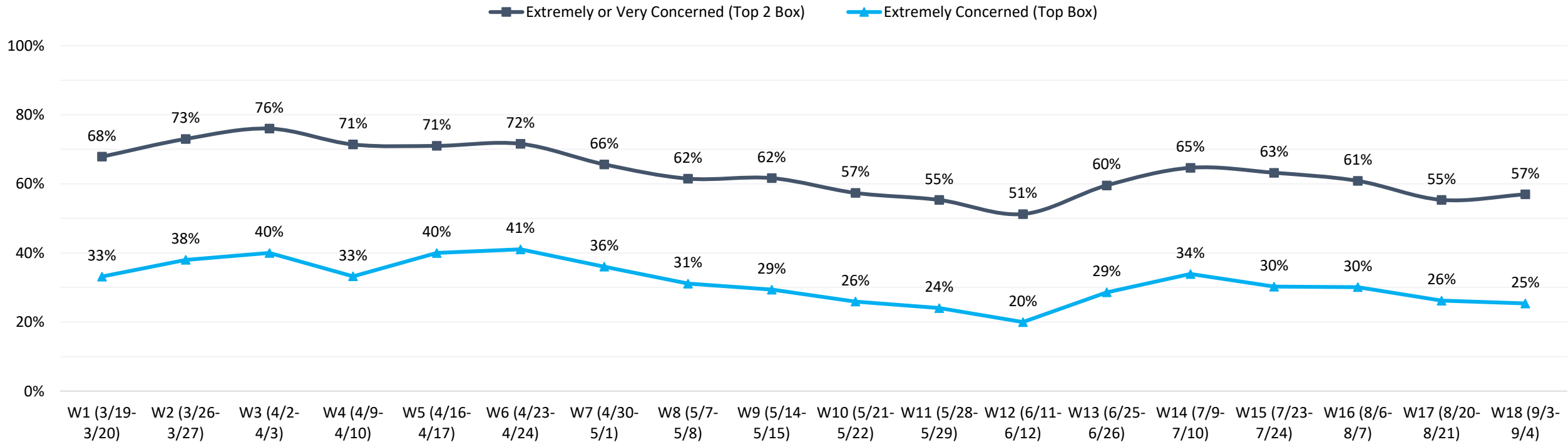
Wave over Wave Trends

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



In line with August's ratings, six in 10 Americans remain concerned about the Covid-19 pandemic overall. Among those, one-quarter are extremely concerned.

Coronavirus/Covid-19 Concern Level



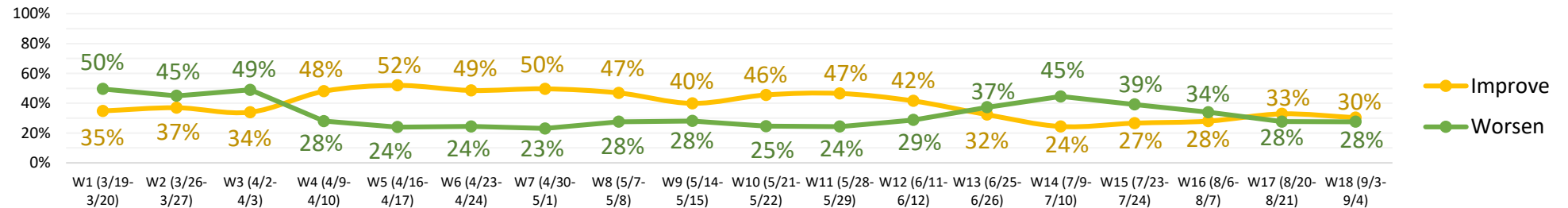
Q7 - Overall, how would you characterize your current level of concern about the Coronavirus/Covid-19 situation? Base: Total

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

Anticipated Change in Coronavirus/Covid-19 Situation

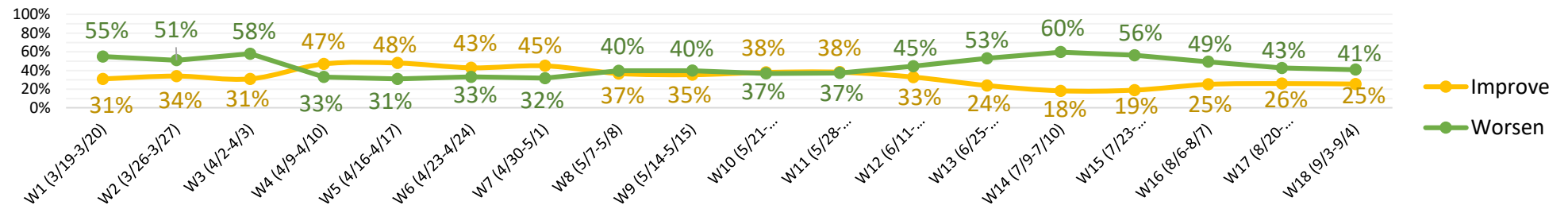
Americans remain split on how the pandemic will unfold in their **local** communities over the next 30 days. Three in 10 expect the situation to improve, while another 3 in 10 expect it to grow worse.

Change Locally in Next 30 Days



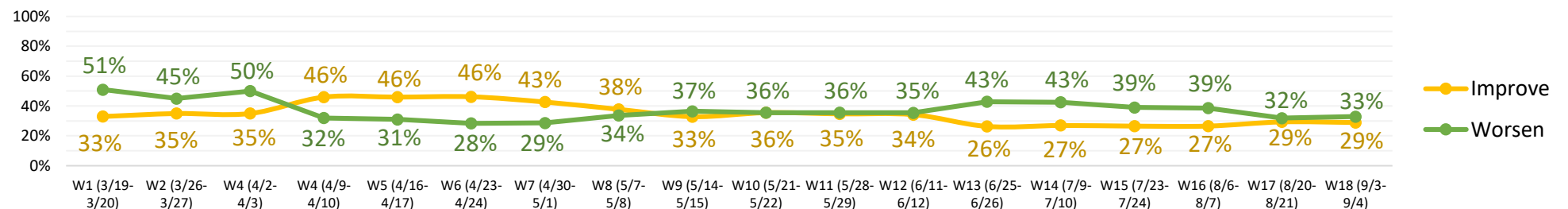
Continuing the trend established months ago, Americans are more pessimistic about how the pandemic will develop **nationally** than they are when thinking about their local communities.

Change in US Overall in Next 30 Days



About one-third of Americans expect the pandemic to worsen **globally** in the coming 30 days, while slightly fewer than that expect the situation to improve.

Change Globally in Next 30 Days

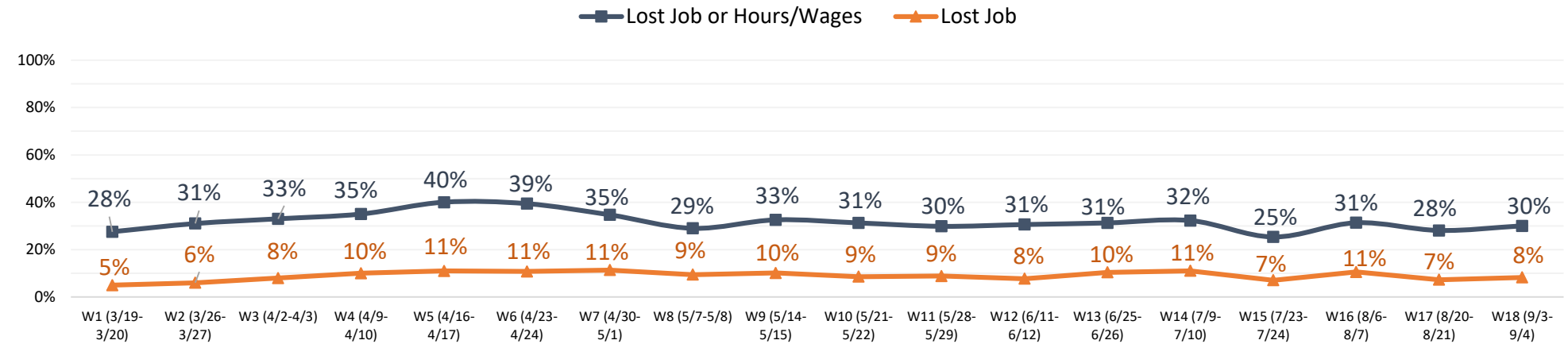


Q22 - Thinking locally, about the US overall, and globally, how do you expect the Coronavirus/Covid-19 situation to change in the next 30 days? Base: Total

Employment, Financial Impact of Coronavirus/Covid-19

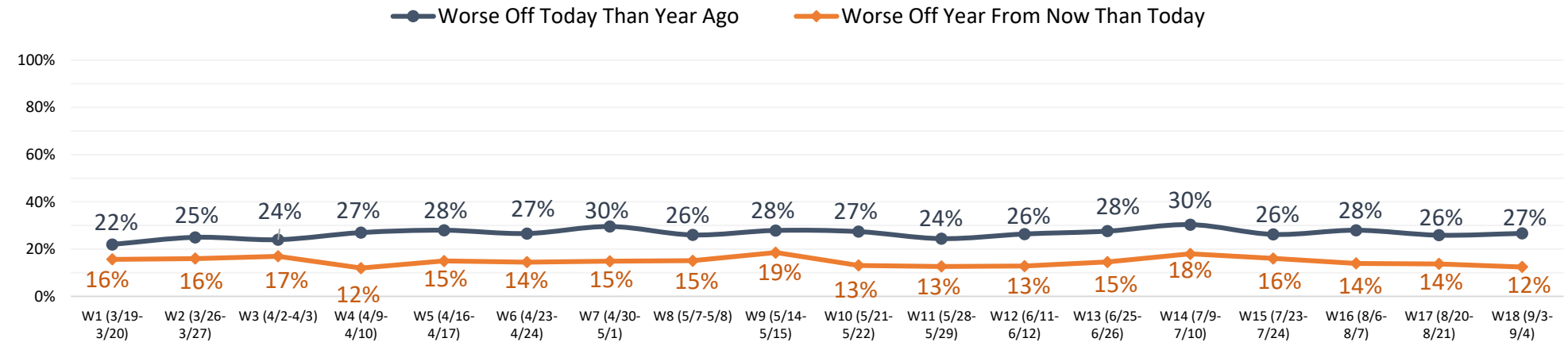
Negative employment impacts caused by the Covid-19 pandemic are steadily reported among 30 percent of Americans. Eight percent currently report losing their job due to the pandemic.

Coronavirus/Covid-19 Impact on Employment



About one-quarter of Americans say they are worse off today when compared to one year ago, while only 12 percent expect to be worse off one year from now.

Personal Financial State vs. One Year Ago, From Now

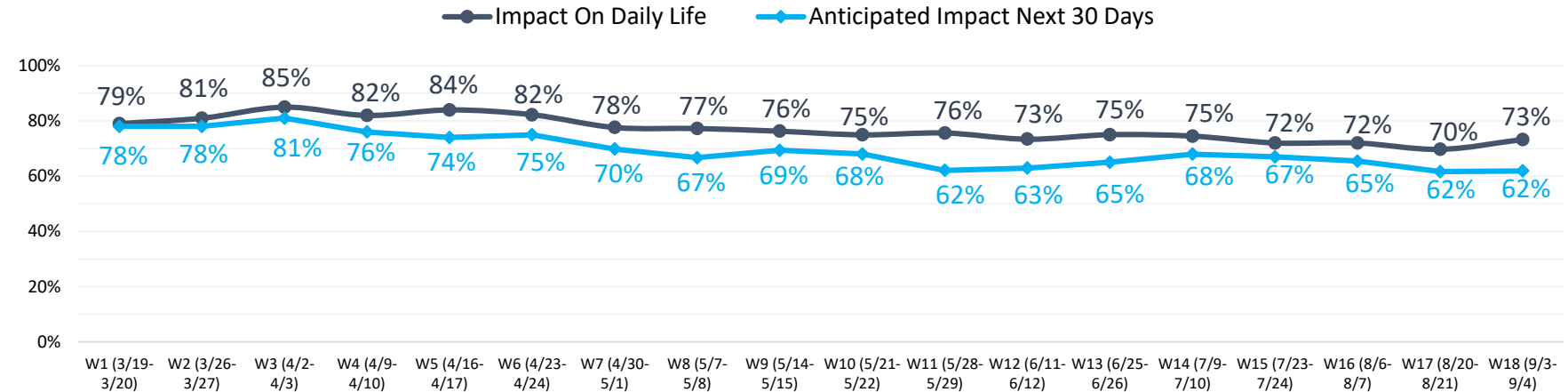


Q19 - At any point, did you lose a job or were your job hours or salary negatively affected by the Coronavirus/Covid-19 situation? Base: Total | Q2 - Would you say that you/your family are better or worse off financially than you were a year ago? / Q3 - Now looking to the future: Do you think one year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

Impact, Estimated Timeline of Coronavirus/Covid-19

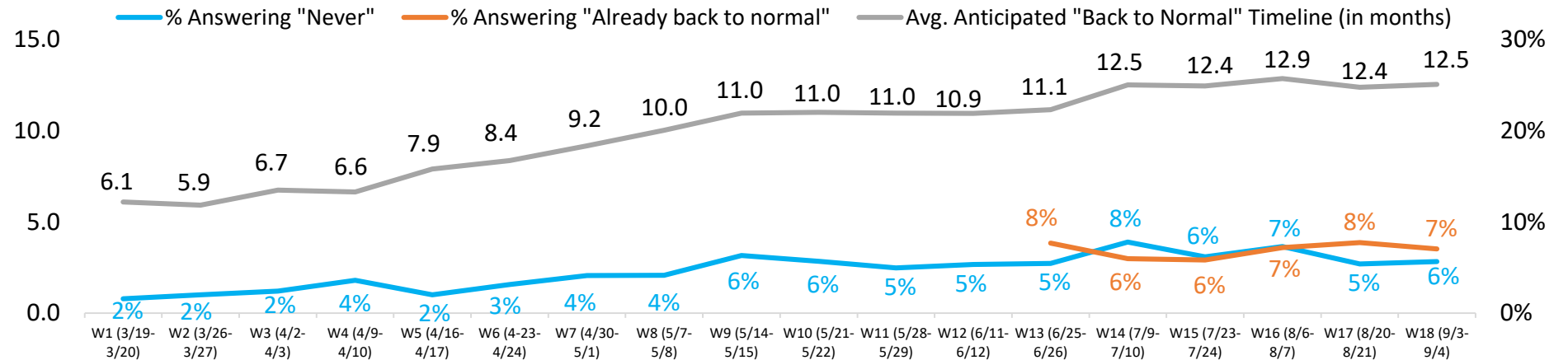
Seven in 10 Americans consistently report severe or moderate impacts to their daily lives because of Covid-19.

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



The time until Americans expect things to “return to normal” is steady at just over 12 months.

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

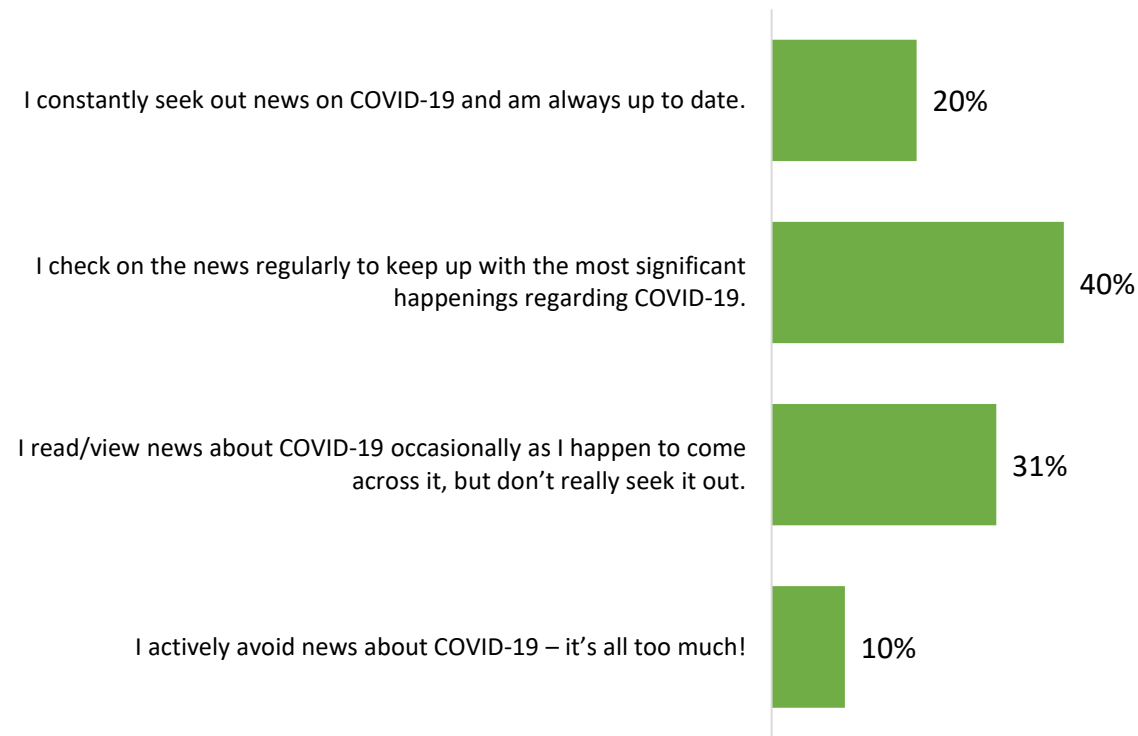
Awareness, Perceptions, Concerns

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

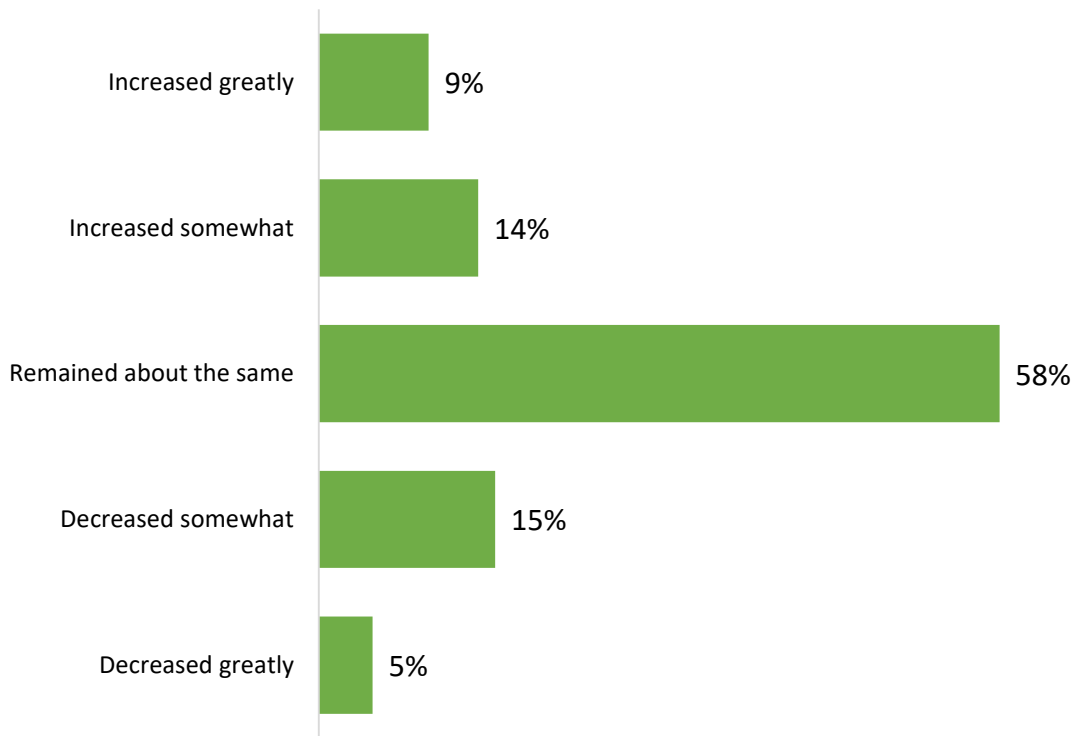


This wave brings little change in consumption habits related to news on Covid-19. Six in 10 Americans seek out information about the pandemic, while the remaining consume news only as they come across it or actively try to avoid it.

Attitudes toward News about Covid-19

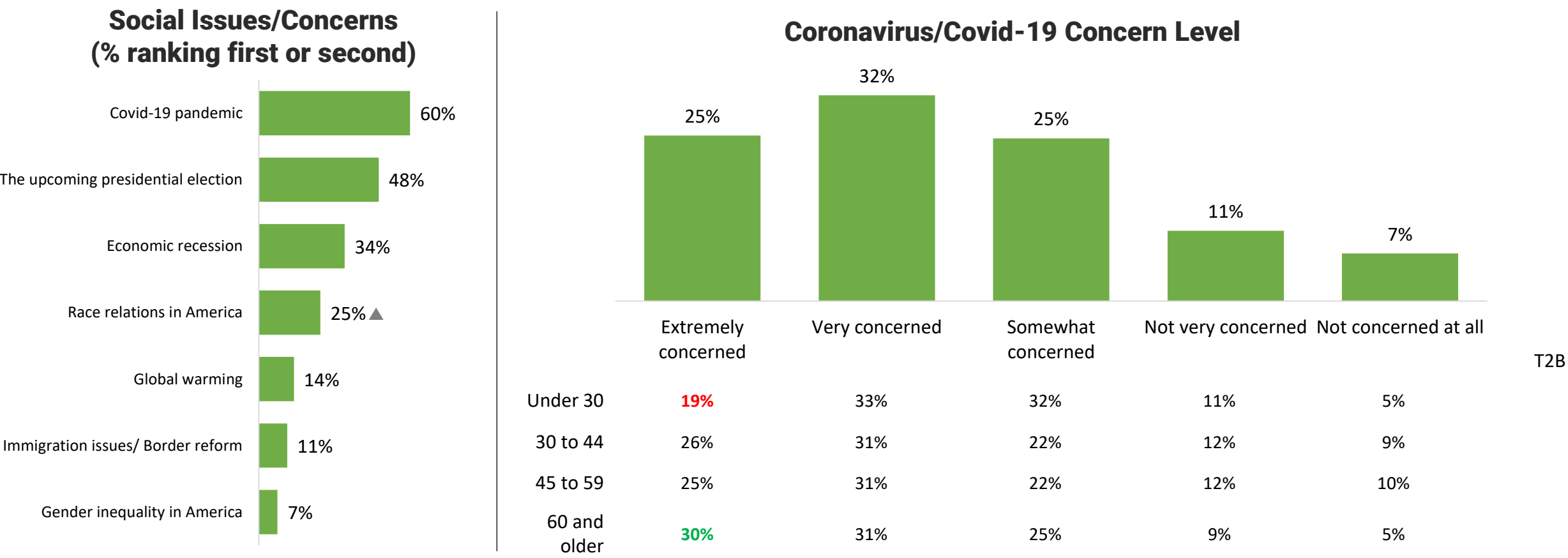


Change in Amount of News Consumed about Covid-19



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

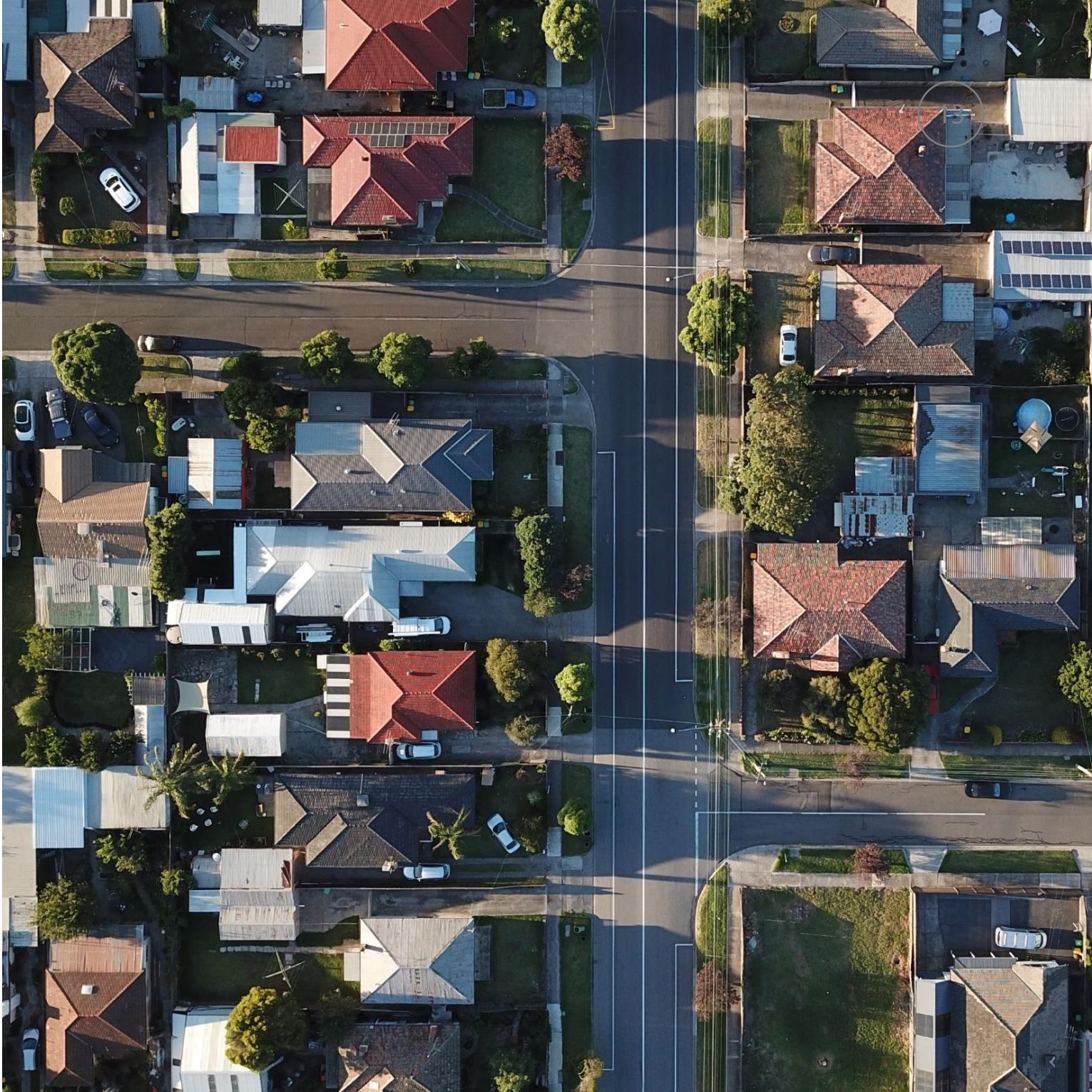
The Covid-19 pandemic remains the most pressing social issue when compared to a selection of several pertinent current topics. Concern levels remain about the same overall this wave. About 60 percent of Americans are currently extremely or very concerned.



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

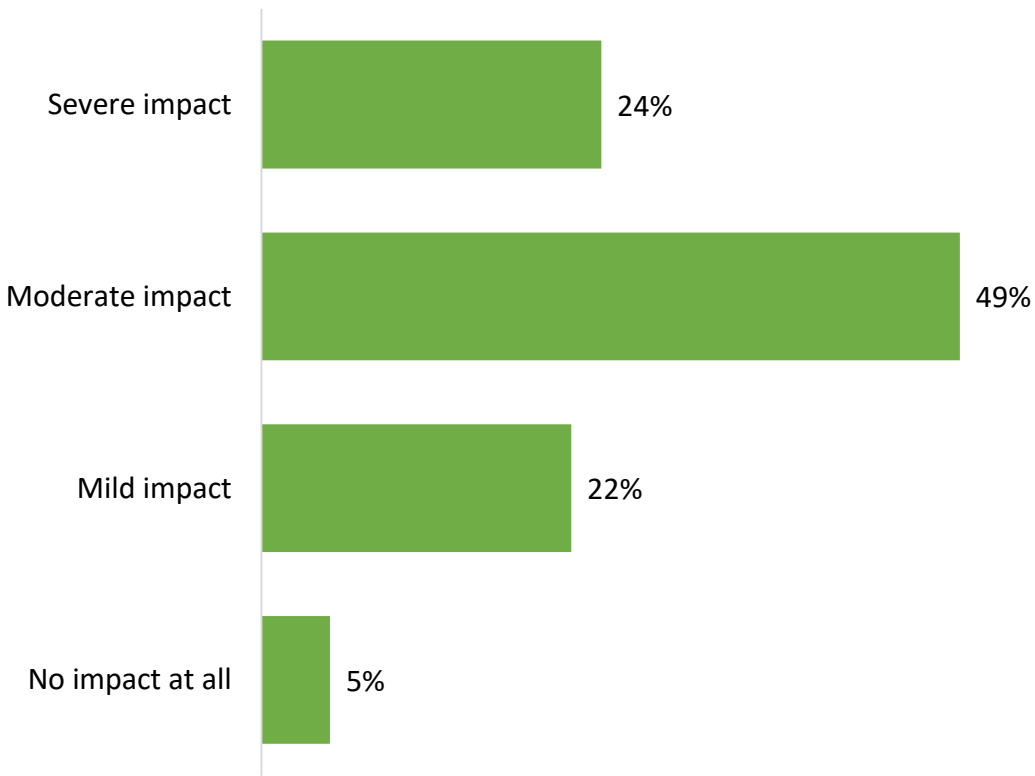
Impact on Daily Life

- Overall Impact
- Behavioral Reactions



The Covid-19 pandemic continues to disrupt the daily lives of a vast majority of Americans – one-quarter say those effects have been severe, and another 50% have experienced moderate impacts. Older Americans are less likely to report disruptions, and higher-income households report more substantial impacts.

Coronavirus/Covid-19 Impact on Daily Life



	Under 30	30 to 44	45 to 59	60 or older
Severe	27%	28%	25%	17%
Severe or Moderate	74%	78%	76%	66%

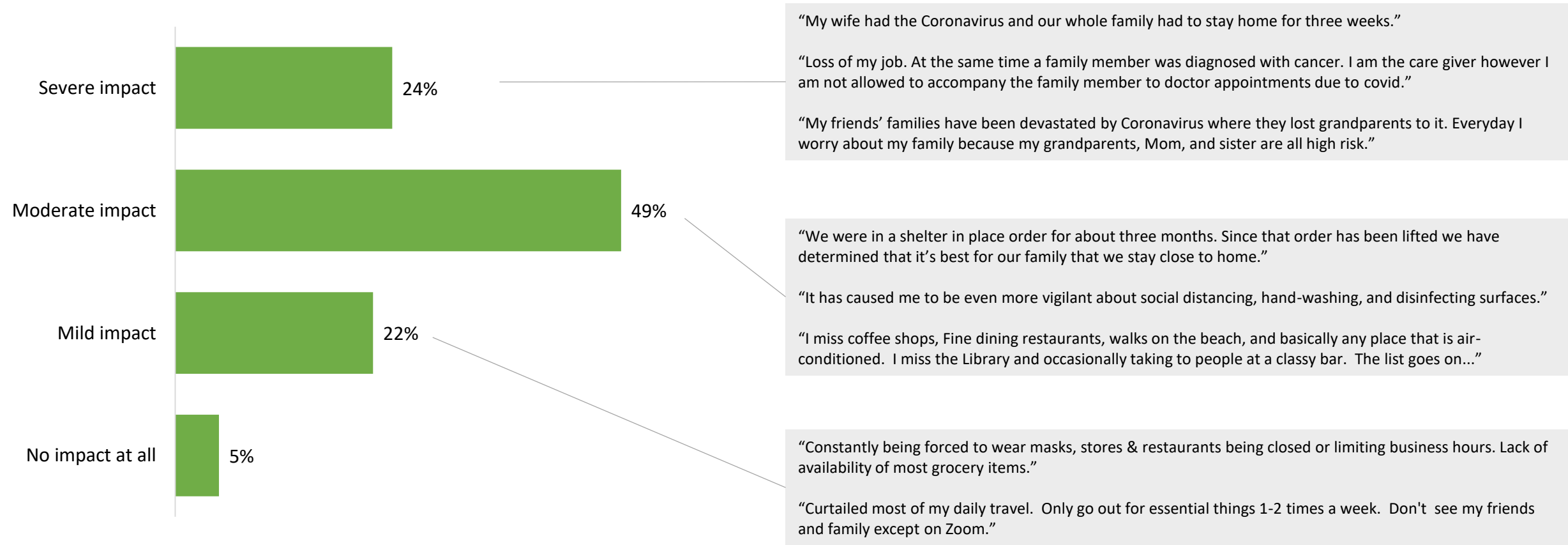
	Under \$50K	\$50K to \$100K	\$100K or more
Severe	24%	24%	24%
Severe or Moderate	67%	73%	83%

	Northeast	Midwest	South	West
Severe	19%	22%	25%	28%
Severe or Moderate	78%	70%	71%	76%

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

Risk of losing loved ones (and in some cases, actual loss) drive heightened concerns over Covid-19, especially when coupled with job loss and other financial hardships. Those less affected by the pandemic remain likely to mention the inconveniences of social distancing and mask-wearing.

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



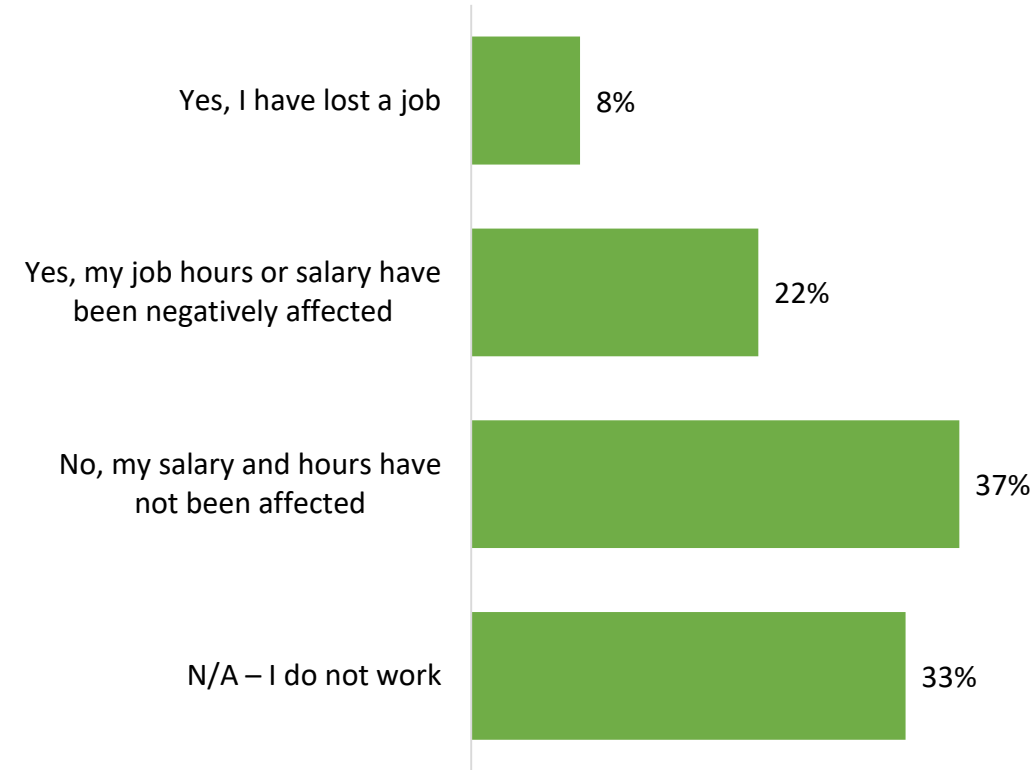
Employment Impact

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



Consistent with previous waves, just under one-tenth of Americans report losing a job due to the pandemic's effects, and another quarter have faced reduced pay in other forms.

Coronavirus/Covid-19 Impact on Employment



	Under 30	30 to 44	45 to 59	60 or older
Lost Job	13%	8%	8%	5%
Lost Job or Wages	31%	38%	33%	20%

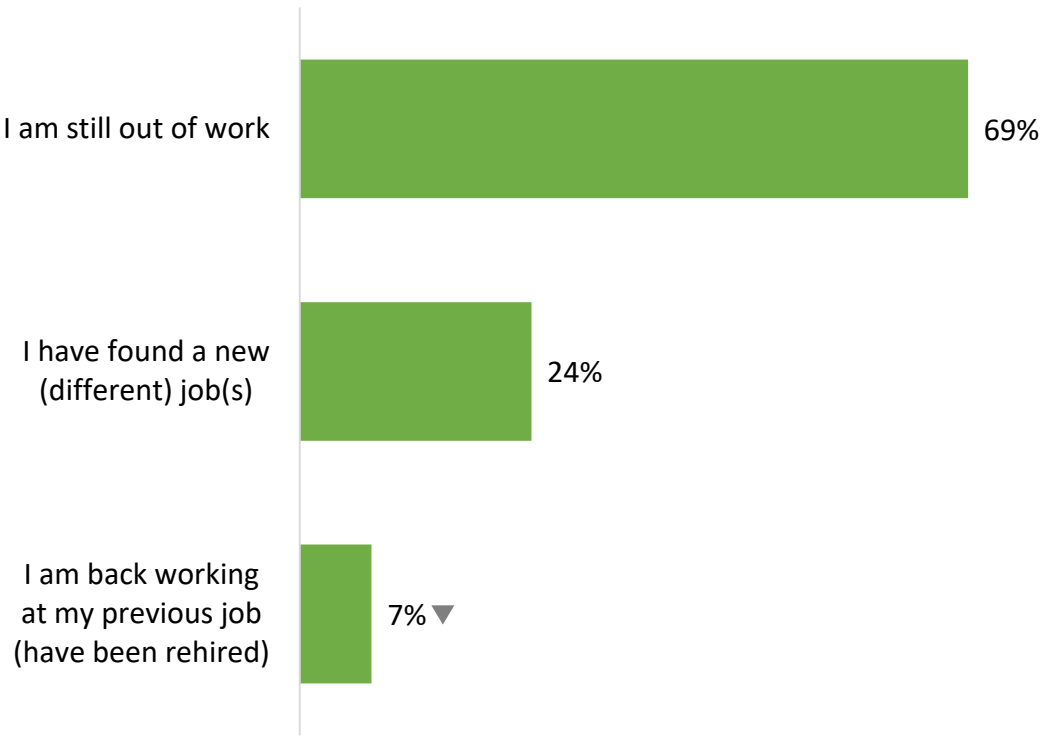
	Male	Female
Lost Job	10%	7%
Lost Job or Wages	32%	29%

	Northeast	Midwest	South	West
Lost Job	6%	9%	8%	10%
Lost Job or Wages	33%	28%	29%	31%

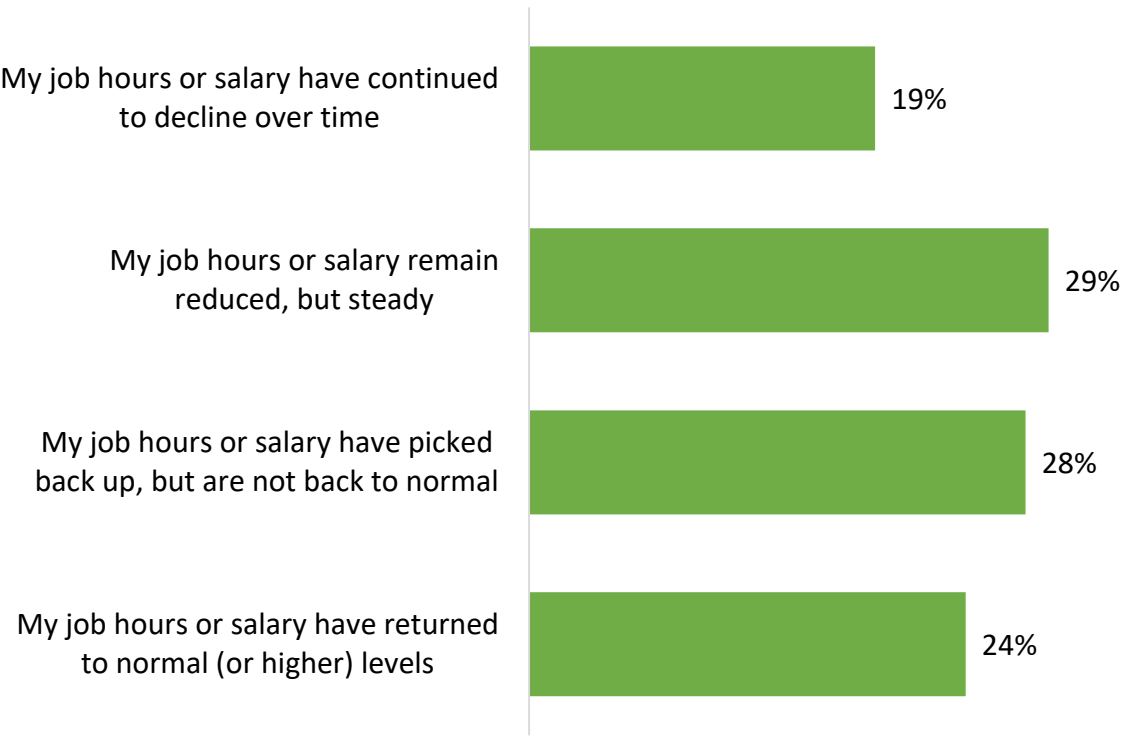
Q19 - At any point, did you lose a job or were your job hours or salary negatively affected by the Coronavirus/Covid-19 situation? Base: Total

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

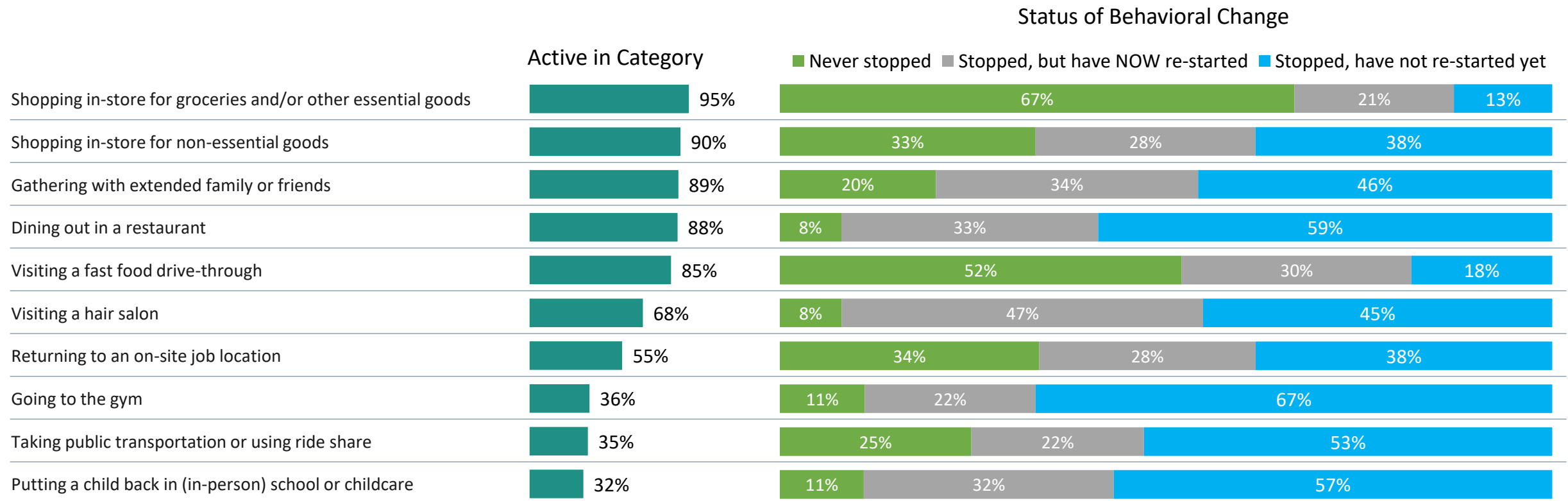
Outlook

- Consumer Confidence
- Projected Impact
- Anticipated Recovery Time



There is little change this wave in people's reactions to various reopening efforts in their communities – among the activities most likely to have been halted due to the pandemic, few are resuming in mass.

Behavioral Change as Communities Reopen

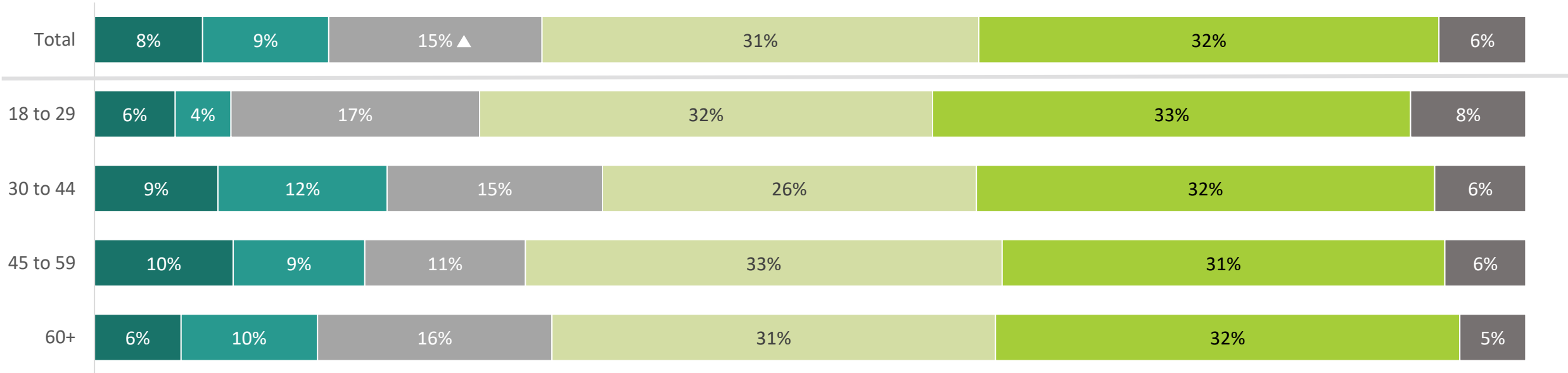


Q35 - As communities reopen, we are interested in understanding how people's behaviors may be changing. For each activity below, please indicate if you never stopped engaging in the behavior due to Covid-19, you stopped due to Covid-19 and have not re-started, you stopped but now have started engaging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

About one-third of Americans remain opposed to any significant community “reopening” while another third would only support reopening if strict measures are taken to preserve public health. Two in five Americans either oppose the notion of stay-at-home guidelines outright, or believe that those guidelines should at least be lifted.

Perceptions of “Reopening”

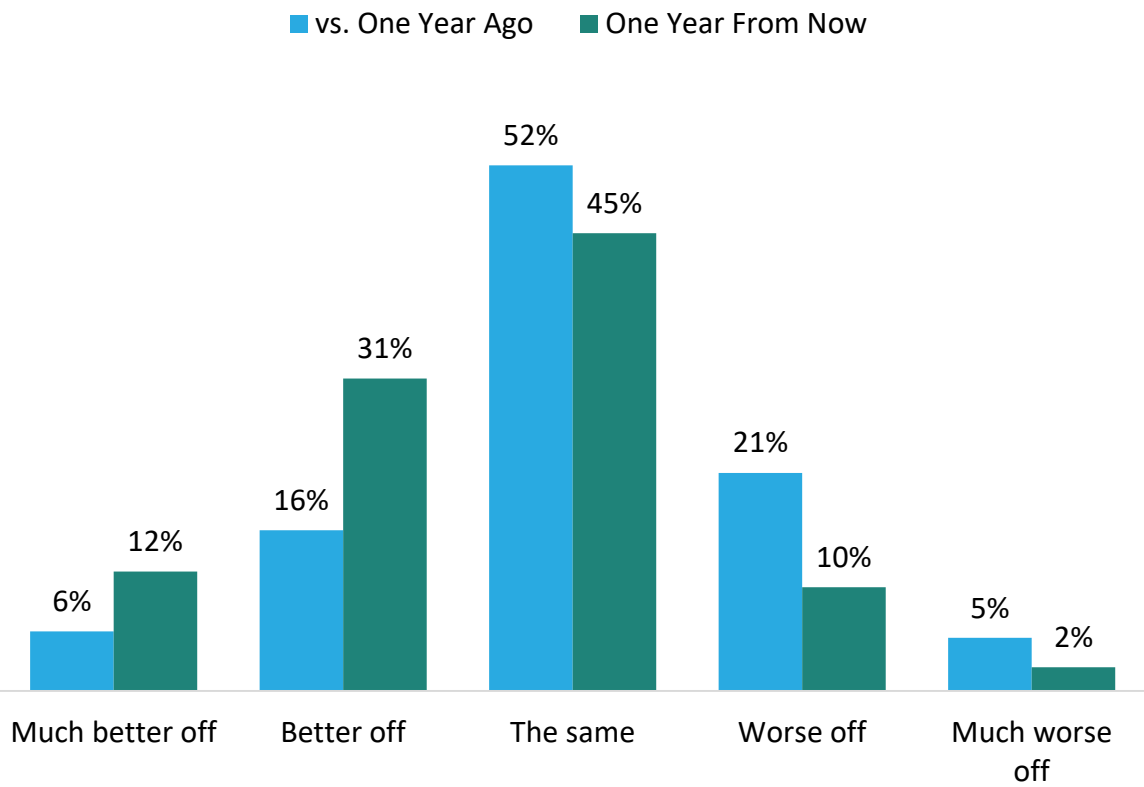
- Stay-at-home guidelines never should have been adopted in the first place.
- Stay-at-home guidelines should have been eased already.
- It's the right time to ease stay-at-home guidelines and reopen, and we need to prioritize getting the economy back up and running as soon as possible.
- It's the right 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



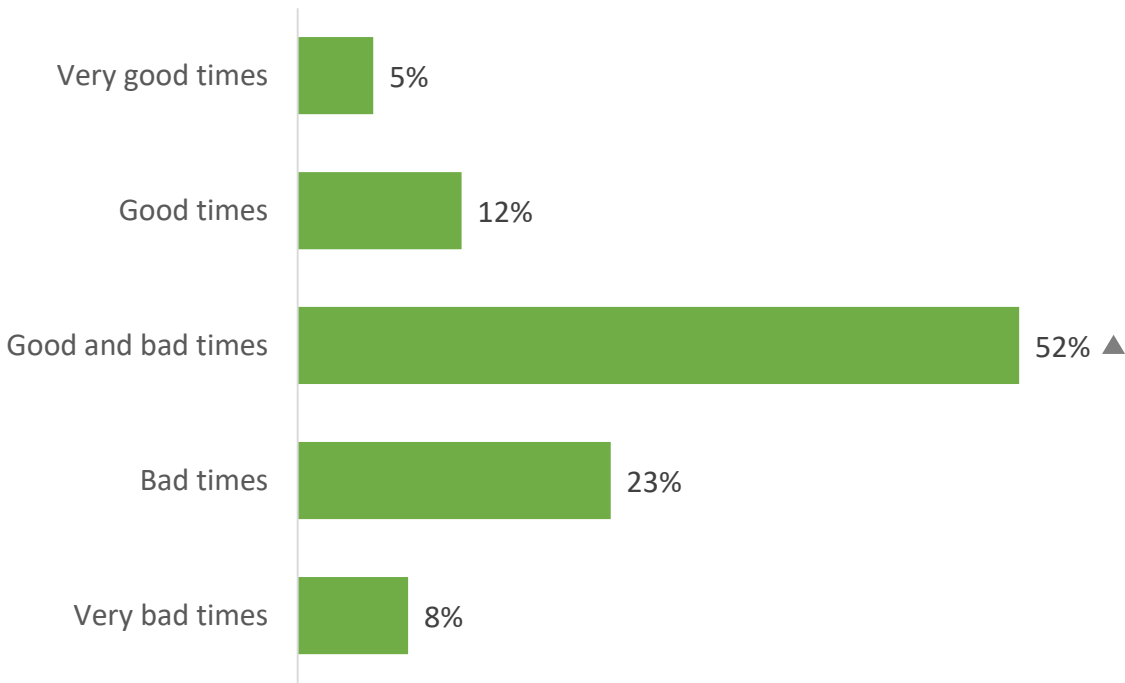
Q33 - Which of the following statements best describes how you feel when it comes to easing stay-at-home guidelines and allowing businesses to reopen? Base: Total

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

Personal Financial State vs. One Year Ago, From Now



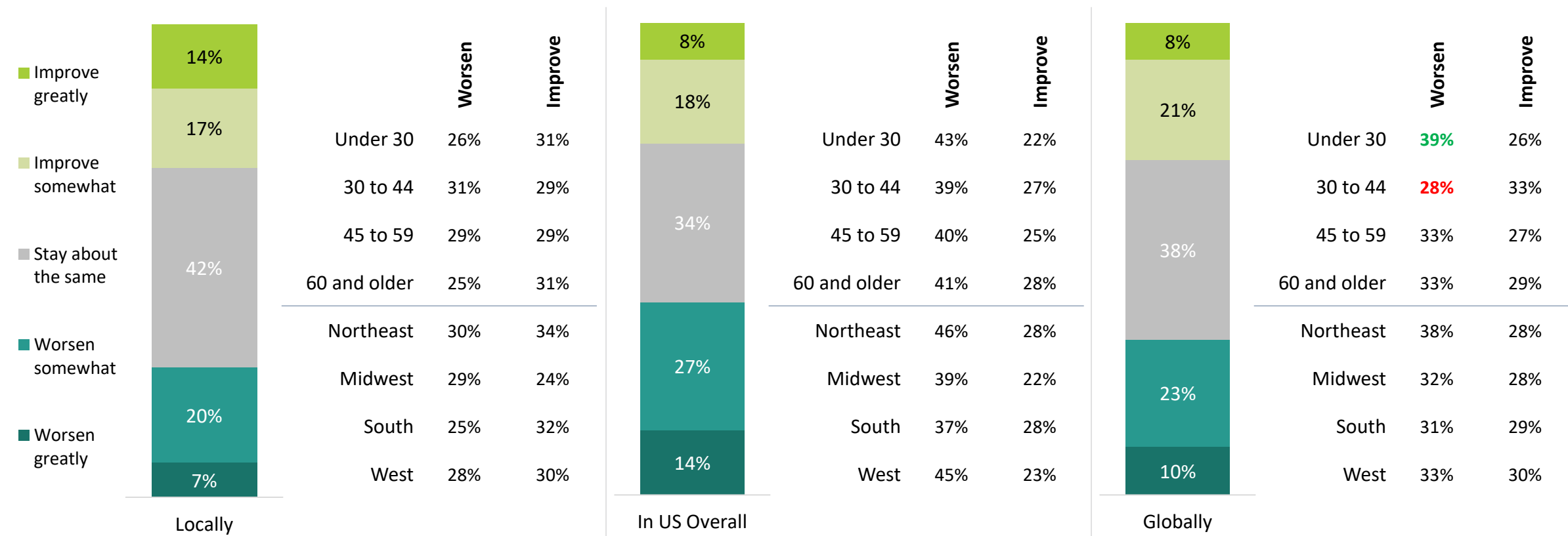
US Business Financial State Over Next 12 Months



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 virtually unchanged 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, but Americans are more pessimistic about the national outlook.

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

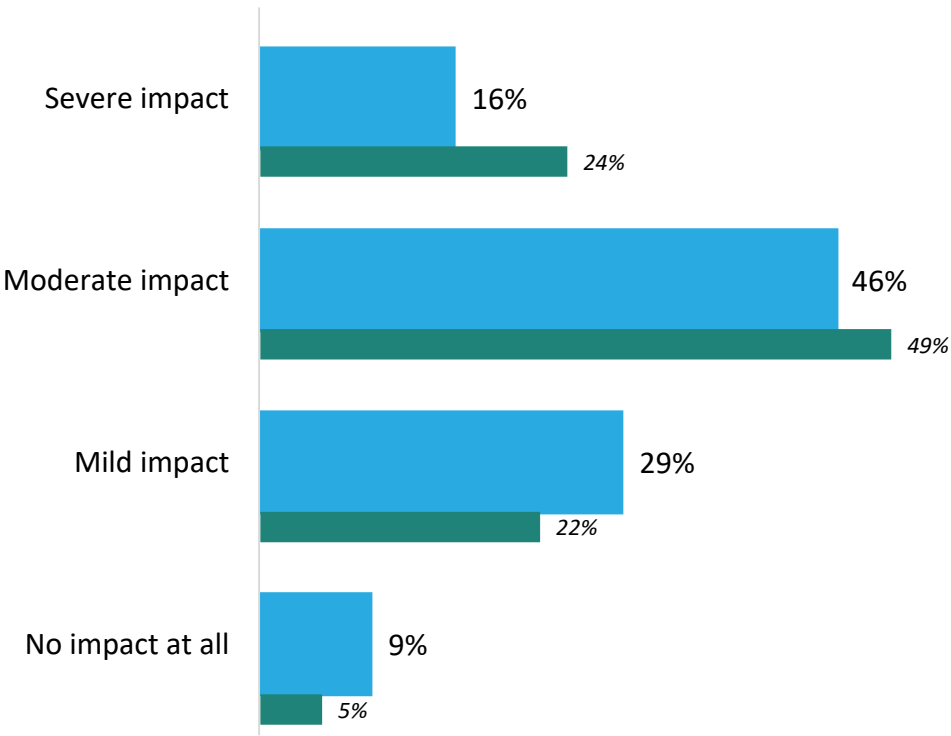


Q22 - Thinking locally, about the US overall, and globally, how do you expect the Coronavirus/Covid-19 situation to change in the next 30 days? Base: Total

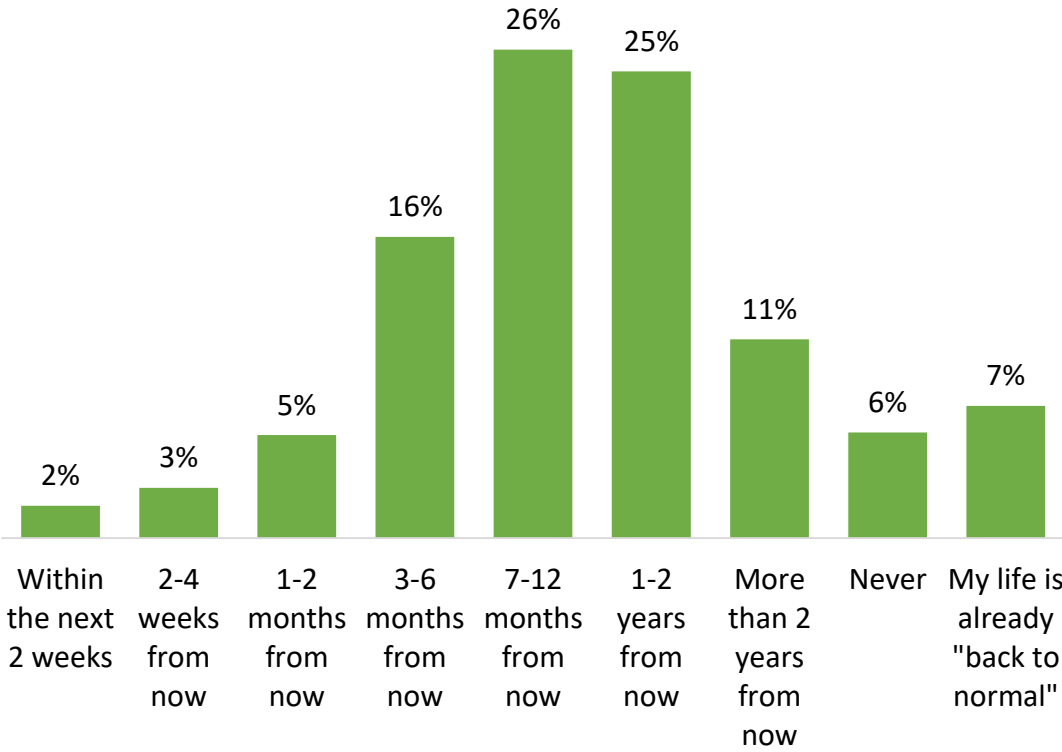
Three in four Americans expect a severe or moderate impact on their daily lives over the coming 30 days, and most still don't expect things to return to "normal" for about a year.

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

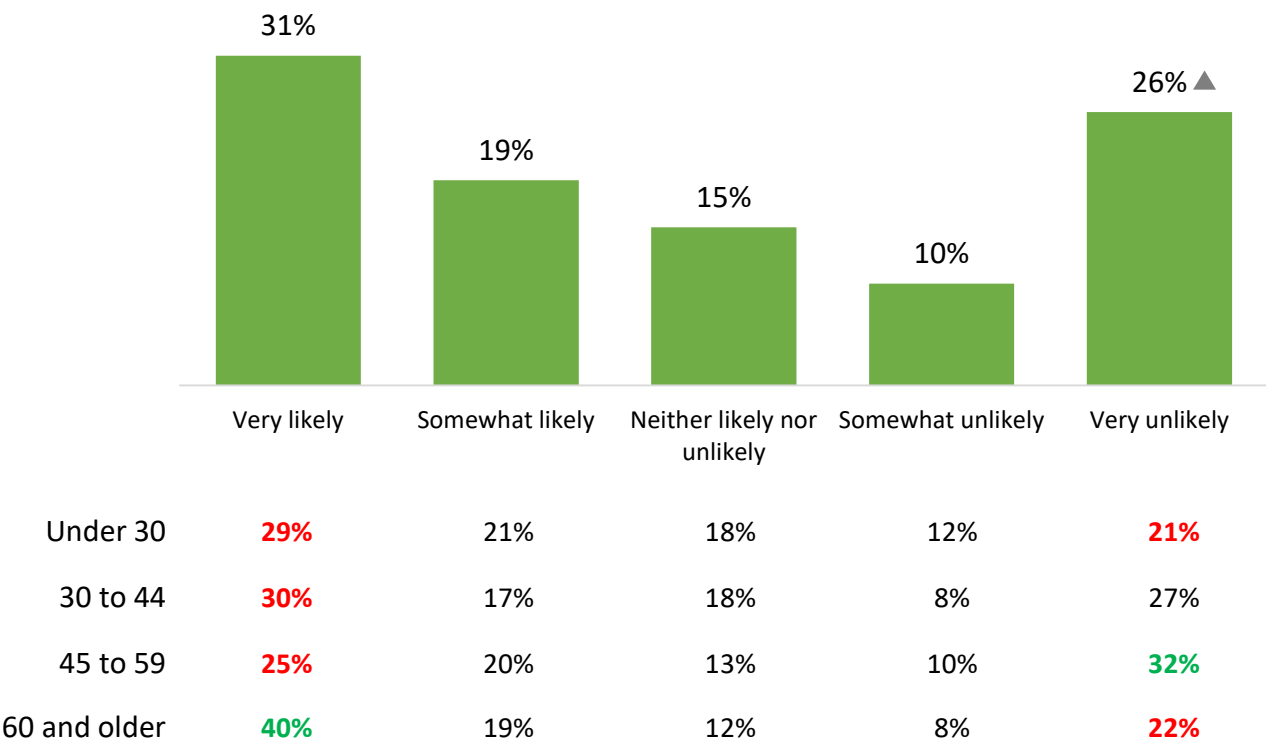
Pulse Topics

- Comfort with Travel
- Vaccine Interest

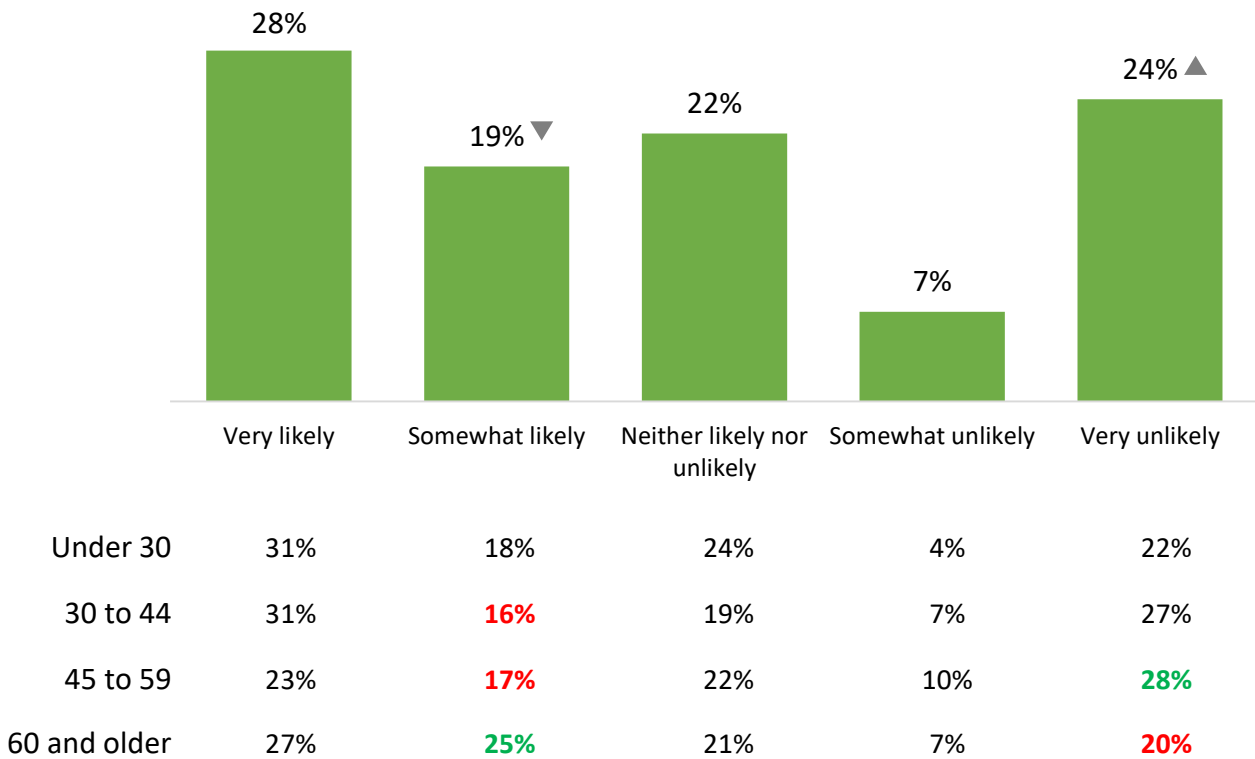


Consumers are comparatively less likely to get a Covid-19 vaccine if it becomes available today than they were in previous waves, although the majority are still supportive of a vaccine in general.

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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