



Covid-19 Pandemic Impact on US Consumers

W19 | October 1st – October 3rd, 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=944 US adults aware of Covid-19 sampled and weighted to be reflective of the US population.*

This nineteenth wave of aytm's Covid-19 Consumer Tracker fielded Thursday, October 1st – Saturday, October 3rd, 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.

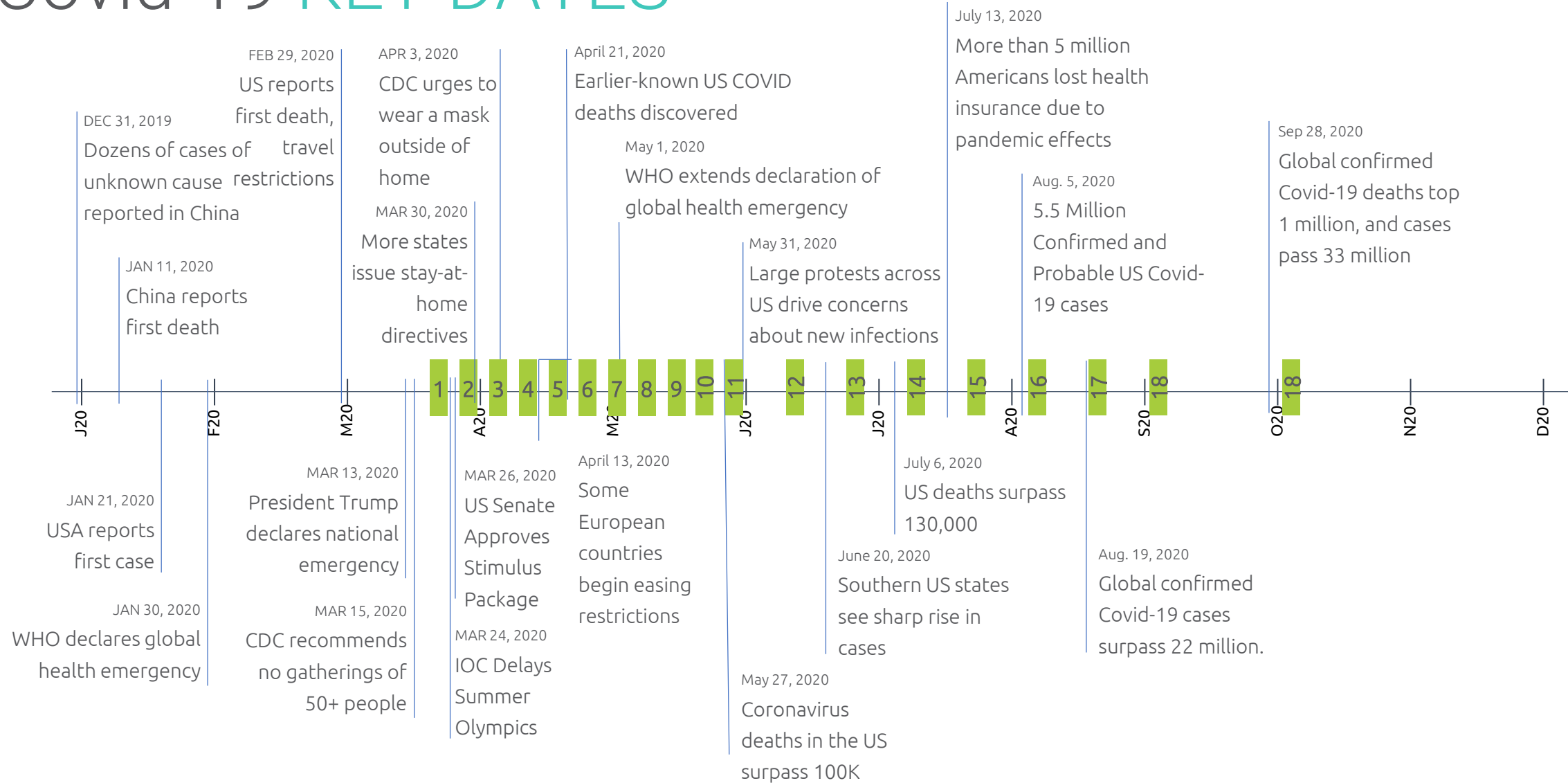
All significance testing is conducted at 95% confidence level with the effective base used as the sample base for statistical calculations (Effective Base = 1,000 for Total sample).

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

- As Fall sets in and signs of a second swell of outbreaks emerge, the national level of concern over the pandemic is generally steady, with about one in six Americans extremely or very concerned about Covid-19.
 - In what has continued as a long-term trend, Americans expect the worst of the pandemic to be felt *elsewhere* – many are more likely to expect improvements in their own local communities, rather than nationally.
 - Consistently, the pandemic induces particularly severe effects on the daily lives of about about one quarter of the American public. Also in line with previous trends, impacts are felt the most in the Northeast and Western parts of the country.
 - Pandemic-related job losses are steady at 10 percent, with another 20 percent reporting other negative impacts to their regular earnings.
 - Covid-19 remains the most pressing social issue on the minds of many Americans, but the upcoming presidential election is also driving a nearly equivalent degree of concern.
- Although Americans don't expect things to return to "normal" for over 13 months (now the longest measured by the tracker so far), many remain certain that their own personal well-being will not be significantly affected in the long run.
 - Even in the face of a developing pandemic, most expect no significant change in their long-term financial state, and just under half actually expect to be in a better financial position overall one year from now.
- This wave, fewer Americans are devoutly *against* the idea of using a hypothetical Covid-19 vaccine if one were available today, and most would encourage others to get a vaccine as well.

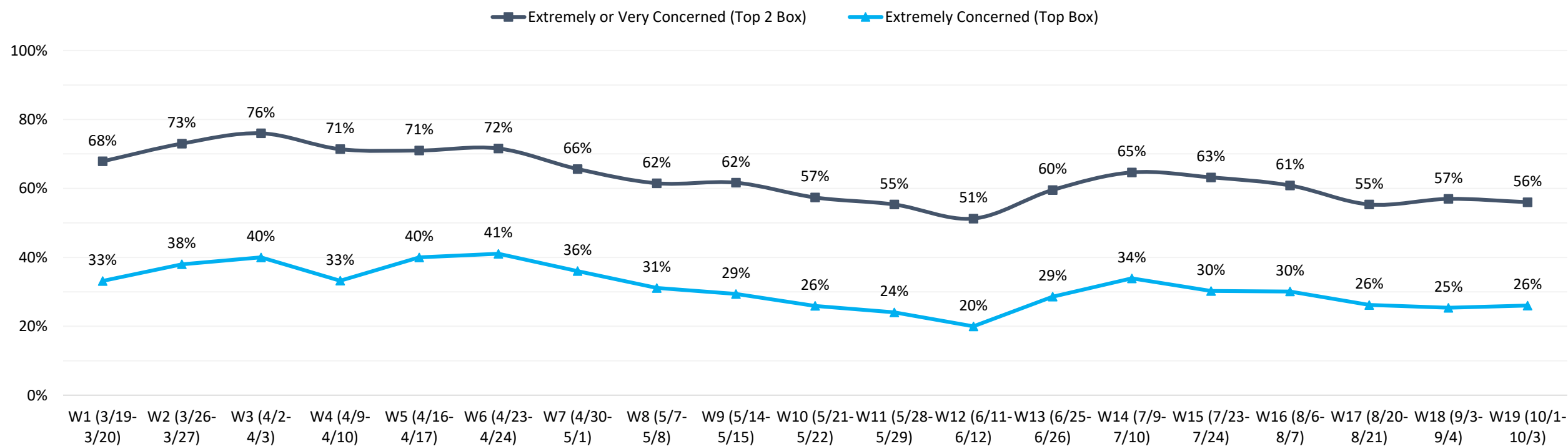
Wave over Wave Trends

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



Overall, the nation's concern level regarding Covid-19 is about even with previous rates – about 60 percent are extremely or very concerned.

Coronavirus/Covid-19 Concern Level

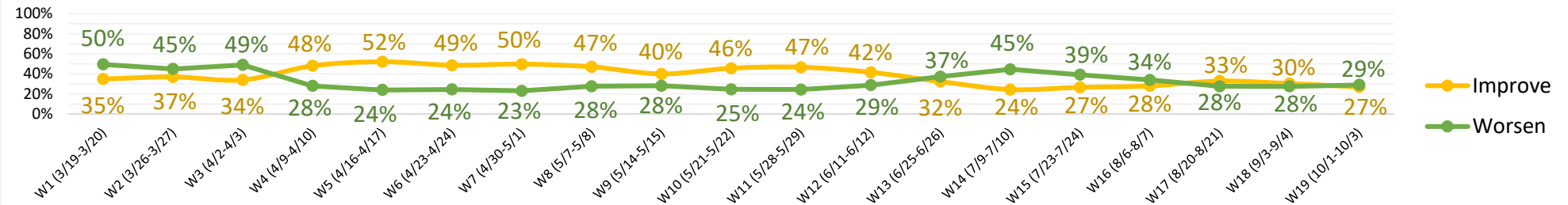


Q7 - Overall, how would you characterize your current level of concern about the Coronavirus/Covid-19 situation? Base: Total

Anticipated Change in Coronavirus/Covid-19 Situation

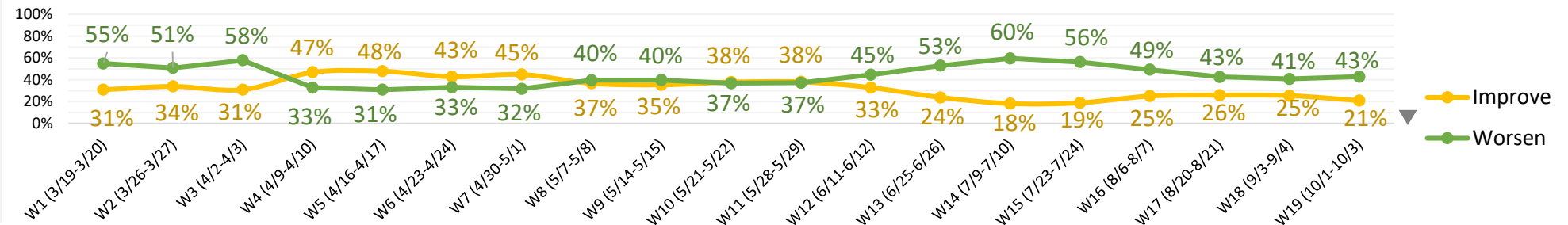
Americans remain split on how the pandemic will unfold in their **local** communities over the next 30 days. Three in 10 expect the situation to improve, while another 3 in 10 expect it to grow worse.

Change Locally in Next 30 Days



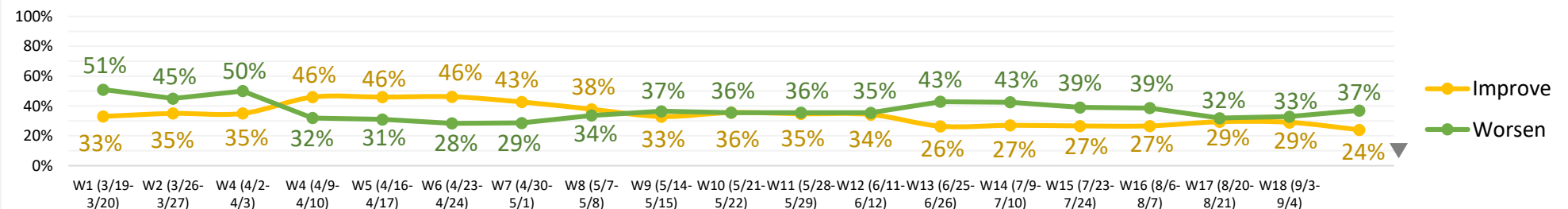
Slightly fewer Americans expect improvements in the Covid-19 situation at the **national** level this wave.

Change in US Overall in Next 30 Days



Similarly, the **global** 30-day outlook turns somewhat more pessimistic this wave, with just about one in four Americans expecting improvements.

Change Globally in Next 30 Days

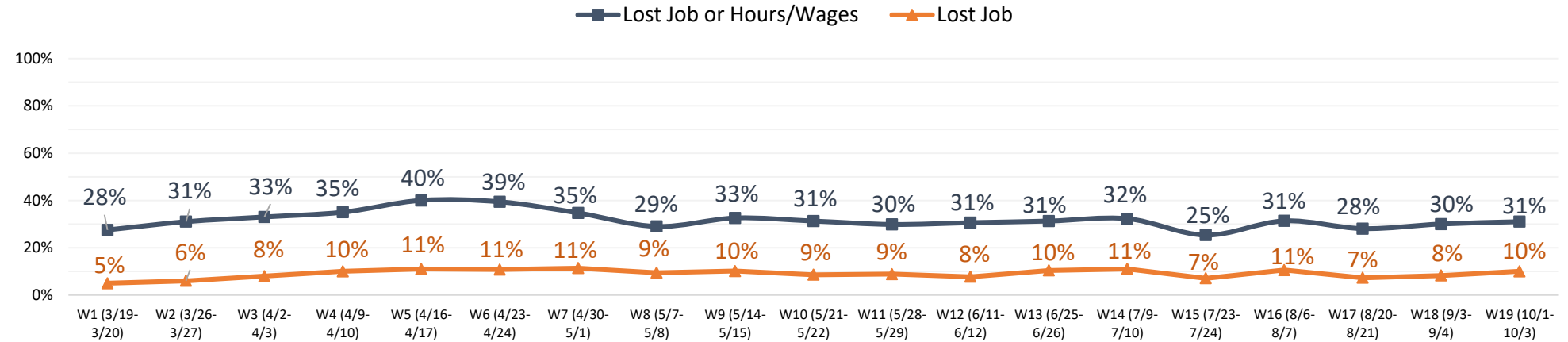


Q22 - Thinking locally, about the US overall, and globally, how do you expect the Coronavirus/Covid-19 situation to change in the next 30 days? Base: Total

Employment, Financial Impact of Coronavirus/Covid-19

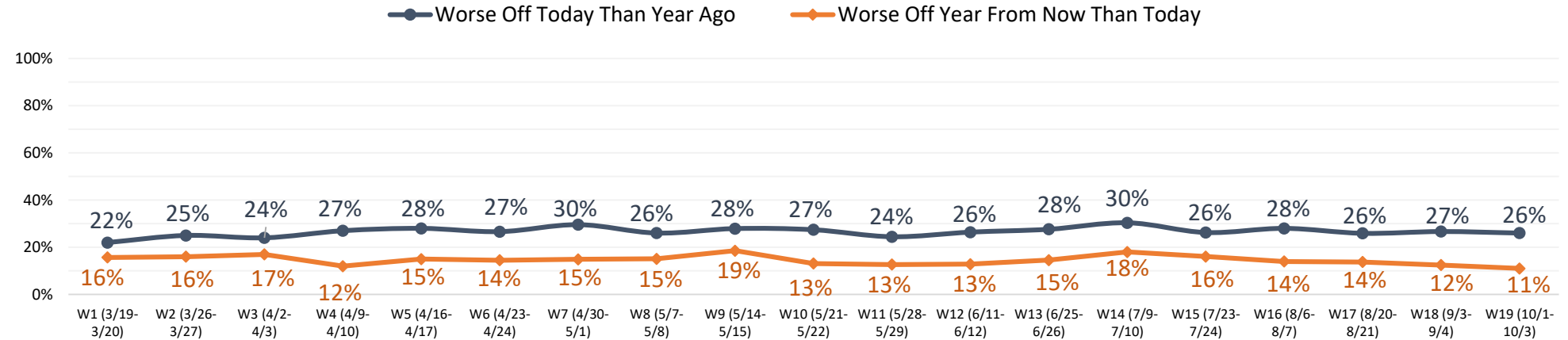
Negative employment impacts caused by the Covid-19 pandemic are steadily reported among 30 percent of Americans. Ten percent currently report losing their job due to the pandemic.

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 11 percent expect to be worse off one year from now.

Personal Financial State vs. One Year Ago, From Now



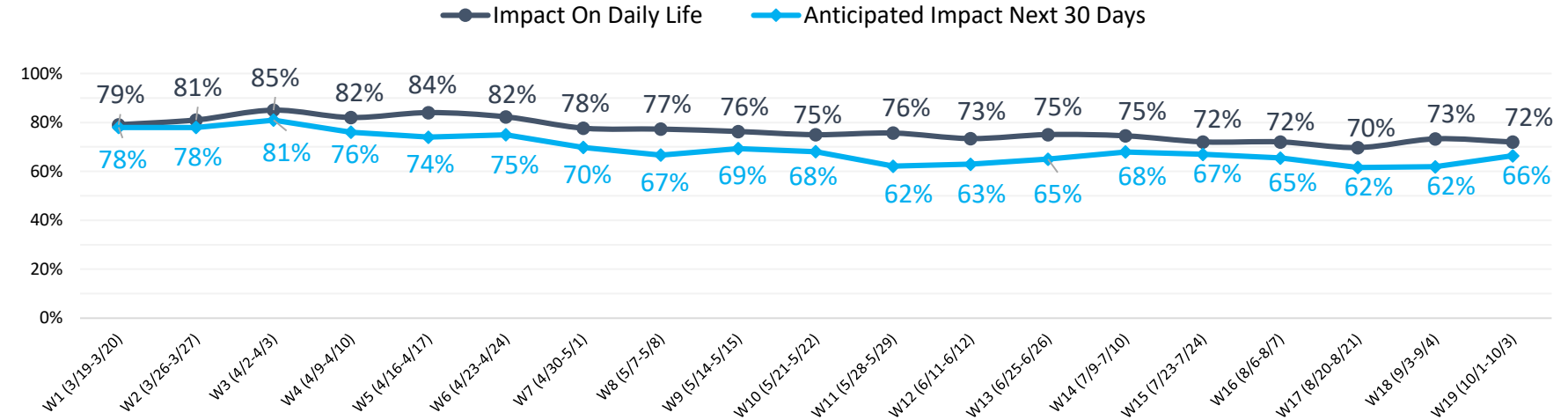
Q19 - At any point, did you lose a job or were your job hours or salary negatively affected by the Coronavirus/Covid-19 situation? Base: Total | Q2 - Would you say that you/your family are better or worse off financially than you were a year ago? / Q3 - Now looking to the future: Do you think one year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

Impact, Estimated Timeline of Coronavirus/Covid-19

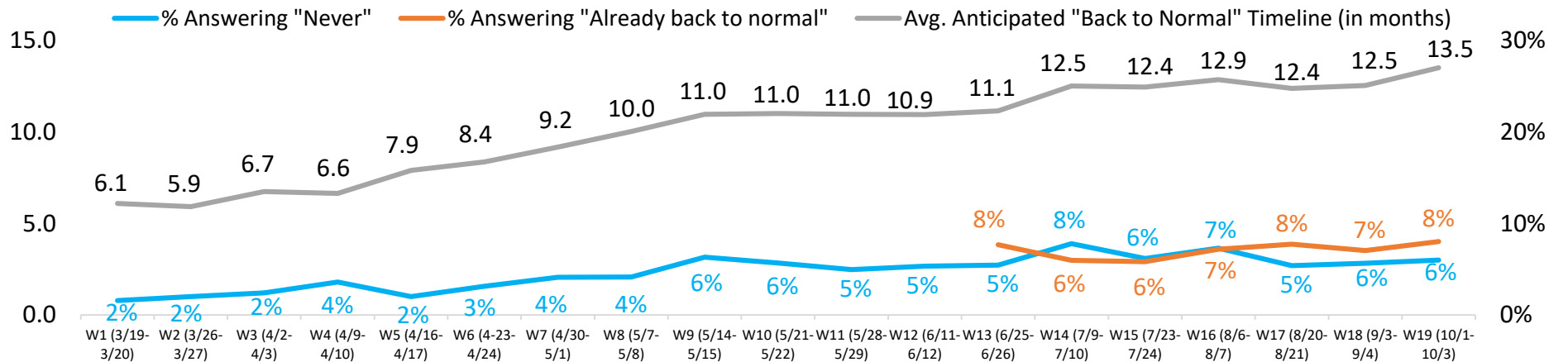
Covid-19 continues to impact the lives of about 7 in 10 Americans in a severe or moderate way.

The time until Americans expect things to “return to normal” is on the rise again, reaching an all-time high of 13.5 months.

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



Anticipated “Back to Normal” Timeline



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

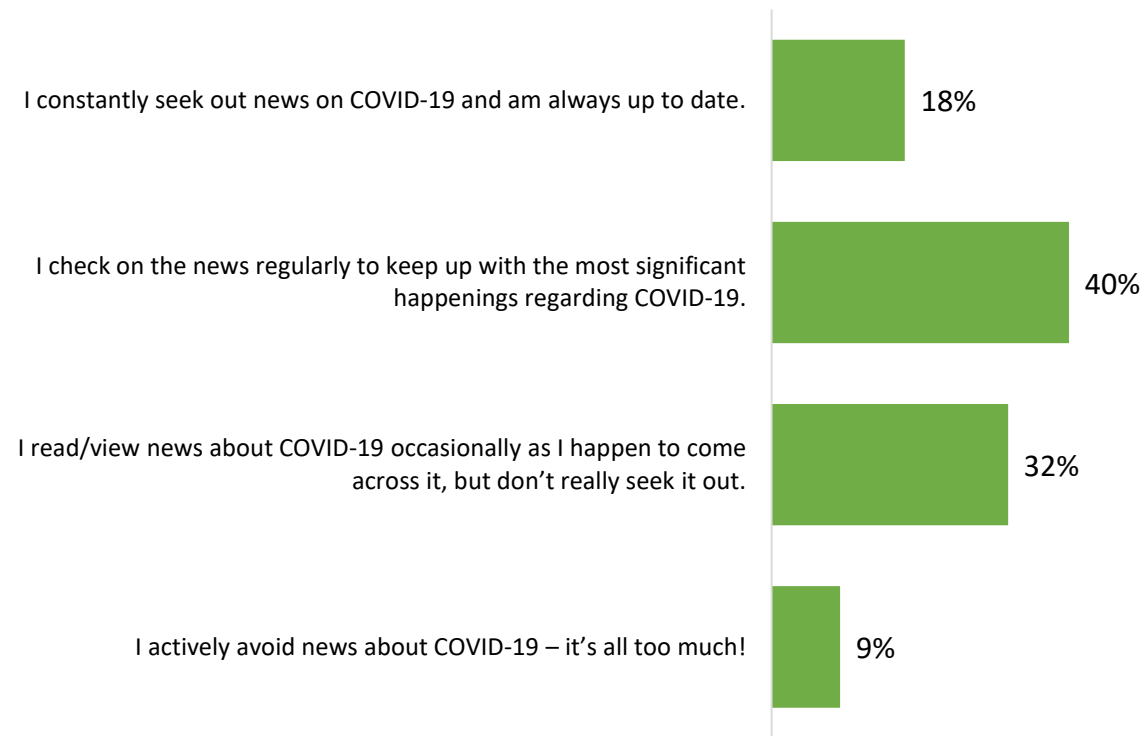
Awareness, Perceptions, Concerns

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

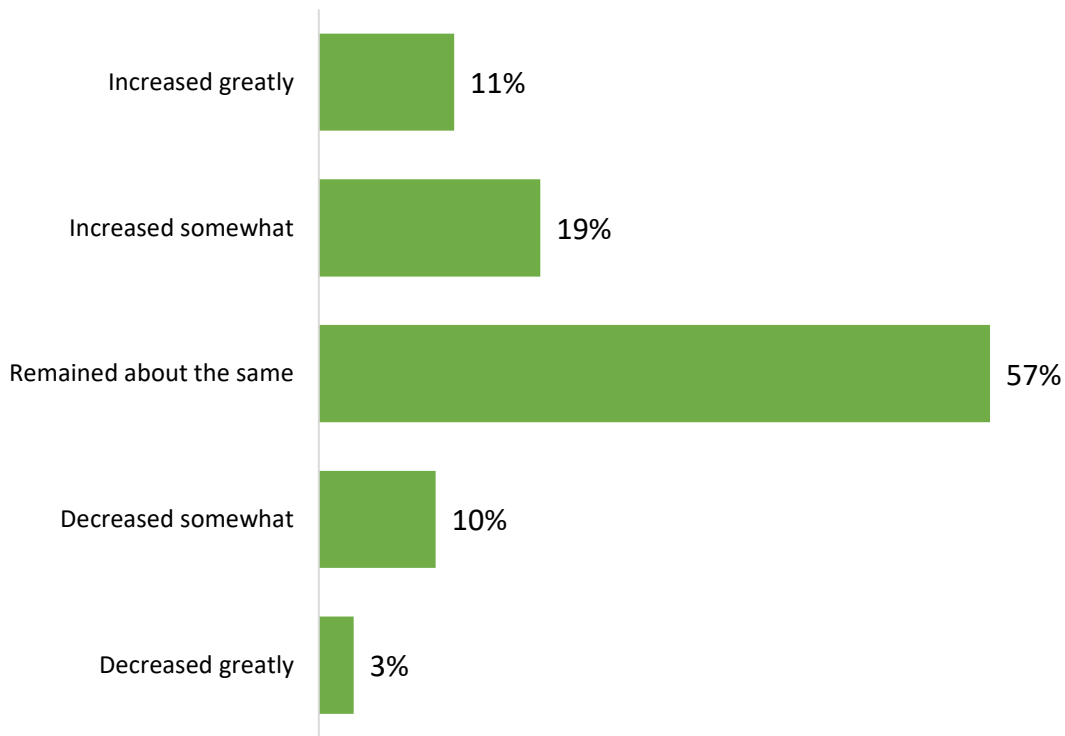


Six in 10 Americans continue to actively seek out information about the pandemic, while the rest consume news only as they come across it or avoid it altogether. About three in 10 Americans are reporting increased news consumption this wave.

Attitudes toward News about Covid-19

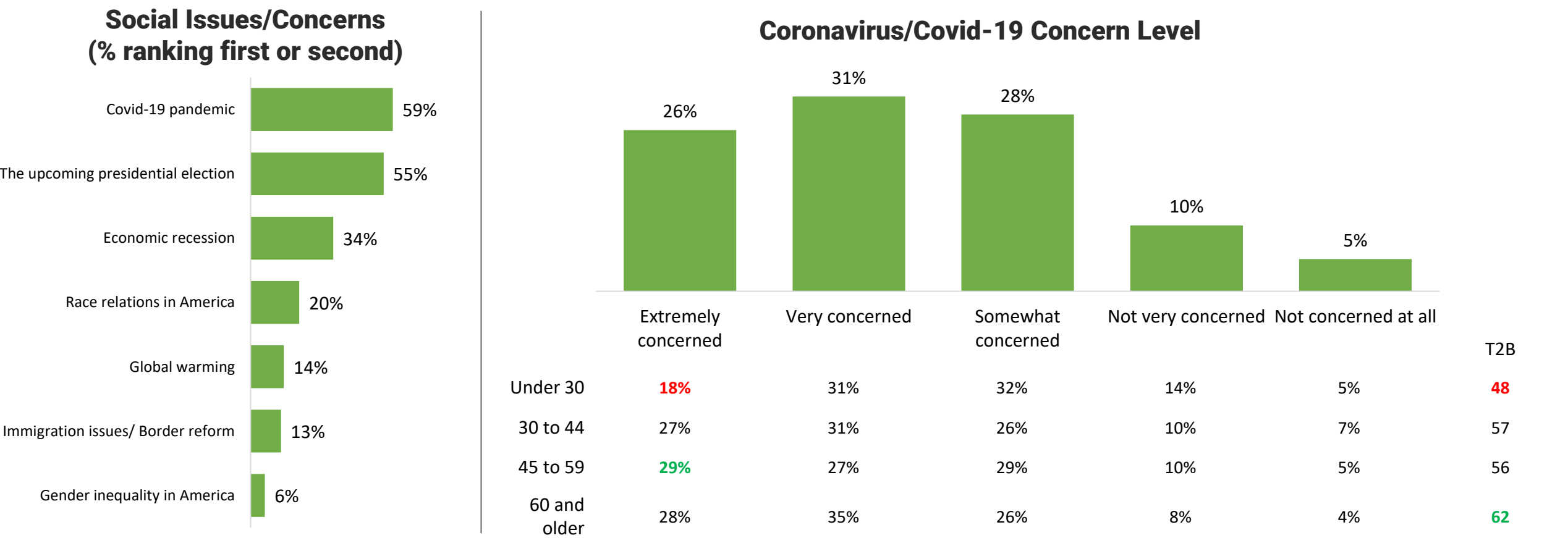


Change in Amount of News Consumed about Covid-19



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

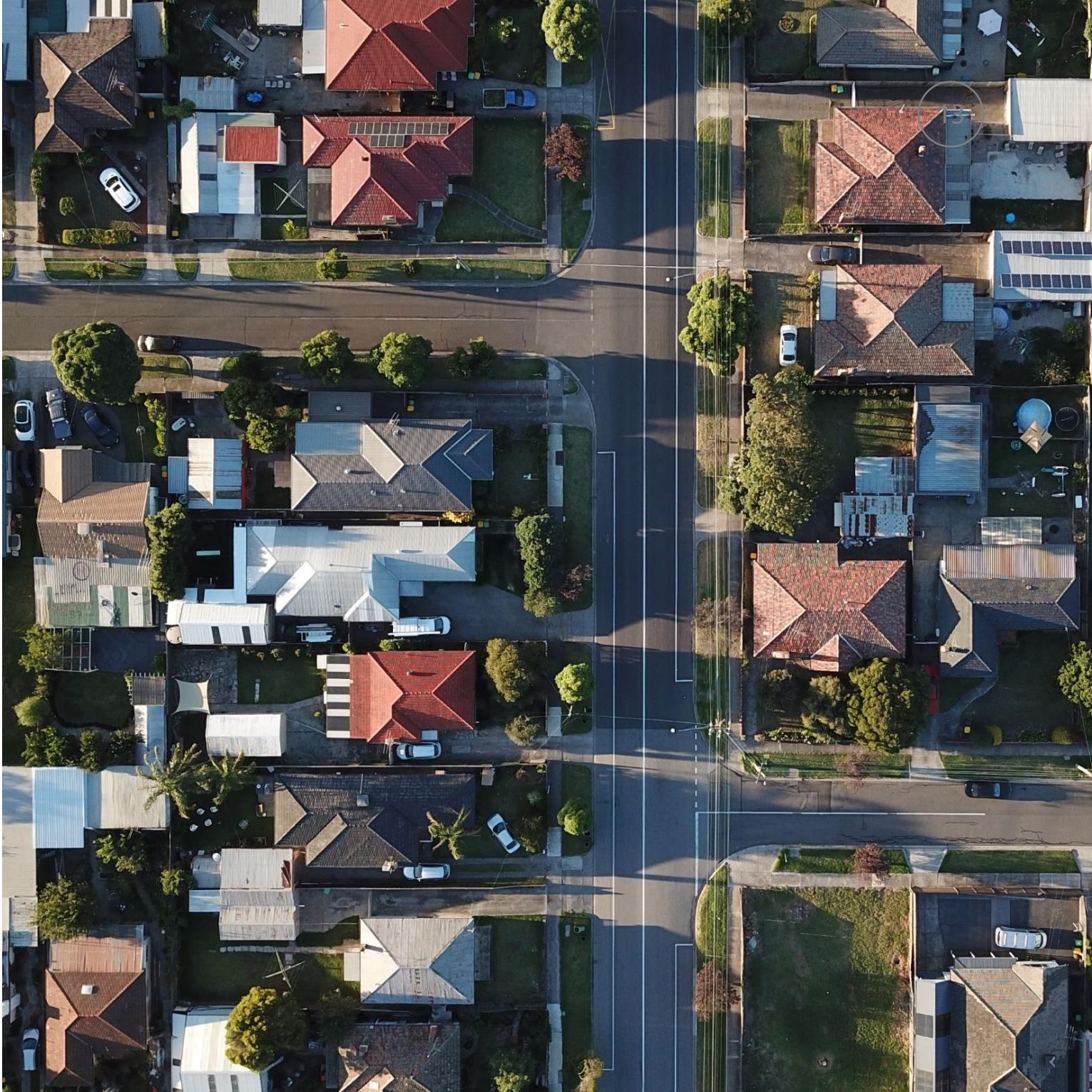
The Covid-19 pandemic remains the most concerning social issue from among a selection of several pertinent current topics, but the upcoming presidential election is climbing that list. Overall, the nation’s concern level regarding Covid-19 is about even with previous rates.



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

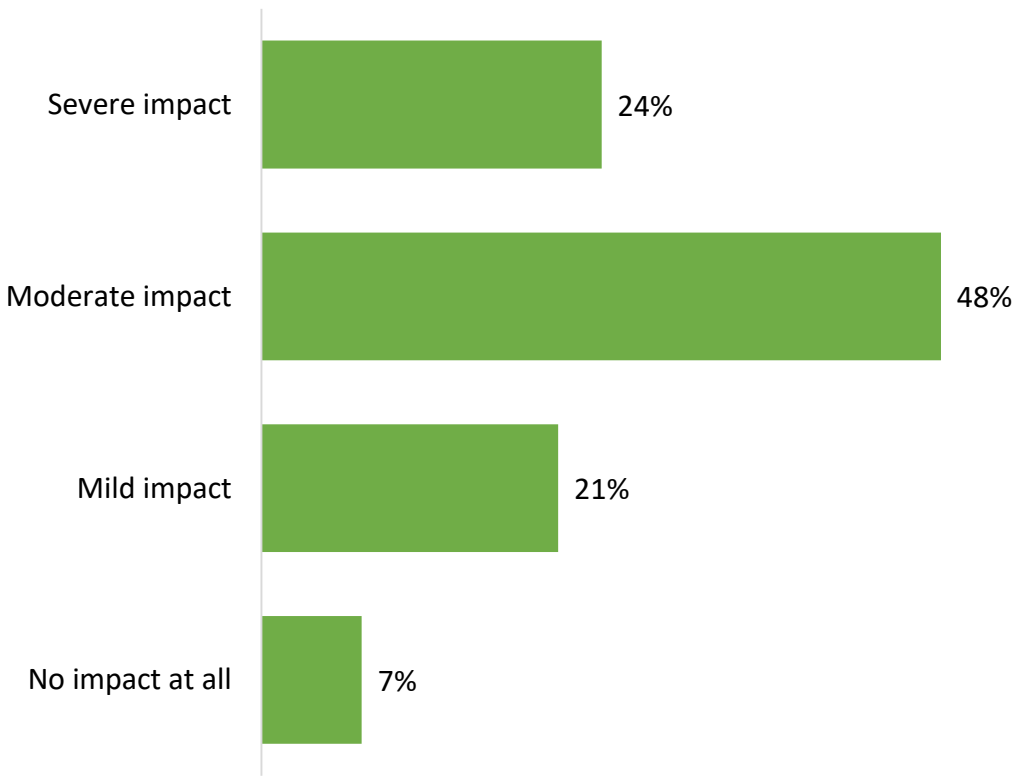
Impact on Daily Life

- Overall Impact
- Behavioral Reactions



Consistently, the pandemic hits about one quarter of the American public the hardest, with another half reports more moderate effects. Also in line with previous trends, impacts are felt the most in the Northeast and Western parts of the country.

Coronavirus/Covid-19 Impact on Daily Life



	Under 30	30 to 44	45 to 59	60 or older
Severe	21%	30%	29%	16%
Severe or Moderate	71%	81%	68%	69%

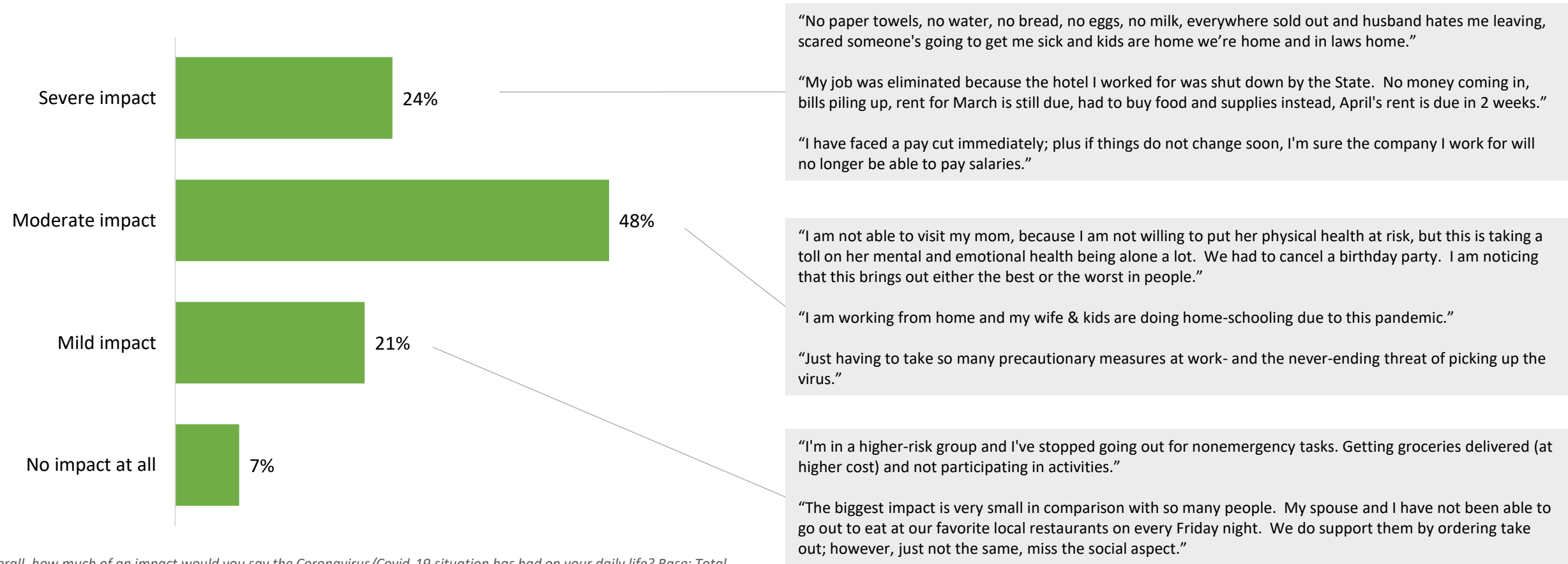
	Under \$50K	\$50K to \$100K	\$100K or more
Severe	25%	20%	27%
Severe or Moderate	67%	70%	80%

	Northeast	Midwest	South	West
Severe	24%	18%	25%	27%
Severe or Moderate	76%	64%	72%	77%

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 lack of basic necessities are themes that continue to emerge as those affected most by the pandemic describe a varied array of challenges. Those less affected by the pandemic are likely to speak of worries for others in more vulnerable populations, and the inconvenience of social distancing/isolation.

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

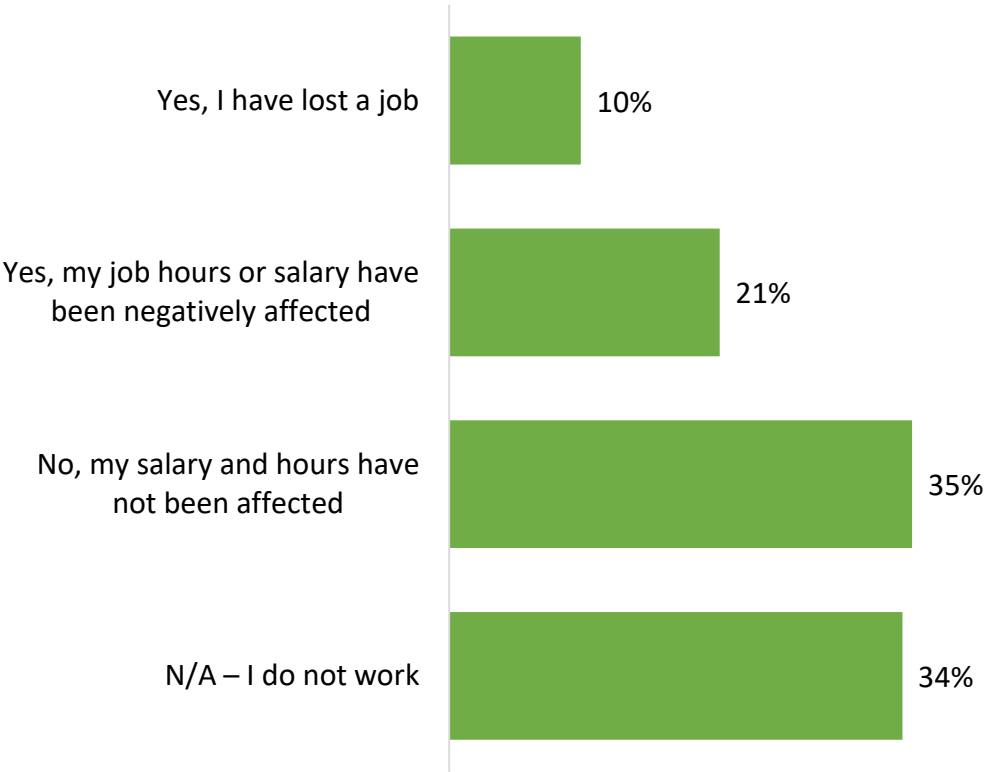
Employment Impact

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



Job losses related to Covid-19 are steady at 10 percent, with another 20 percent reporting other negative impacts to their regular earnings.

Coronavirus/Covid-19 Impact on Employment



	Under 30	30 to 44	45 to 59	60 or older
Lost Job	19%	11%	5%	7%
Lost Job or Wages	37%	43%	26%	18%

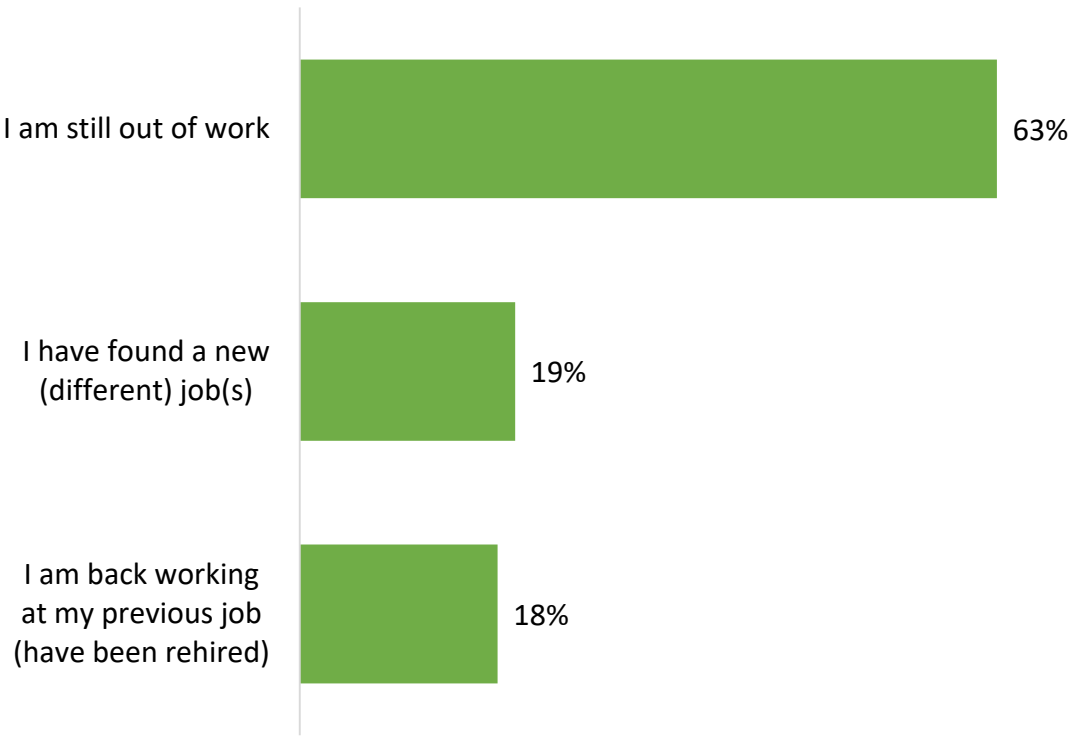
	Male	Female
Lost Job	11%	9%
Lost Job or Wages	34%	27%

	Northeast	Midwest	South	West
Lost Job	13%	7%	9%	12%
Lost Job or Wages	37%	26%	30%	31%

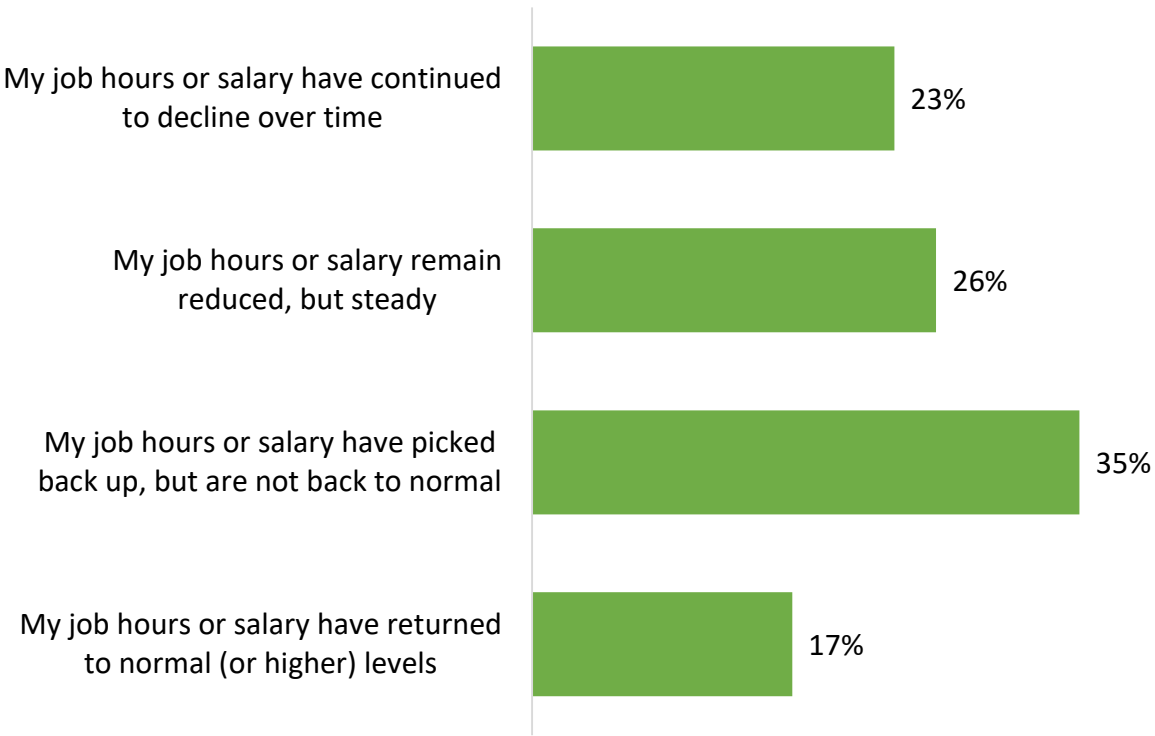
Q19 - At any point, did you lose a job or were your job hours or salary negatively affected by the Coronavirus/Covid-19 situation? Base: Total

Just under two-thirds of Americans who have lost a job remain out of work. Among those who experienced a loss of income due to the pandemic, most continue on with reduced earnings.

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

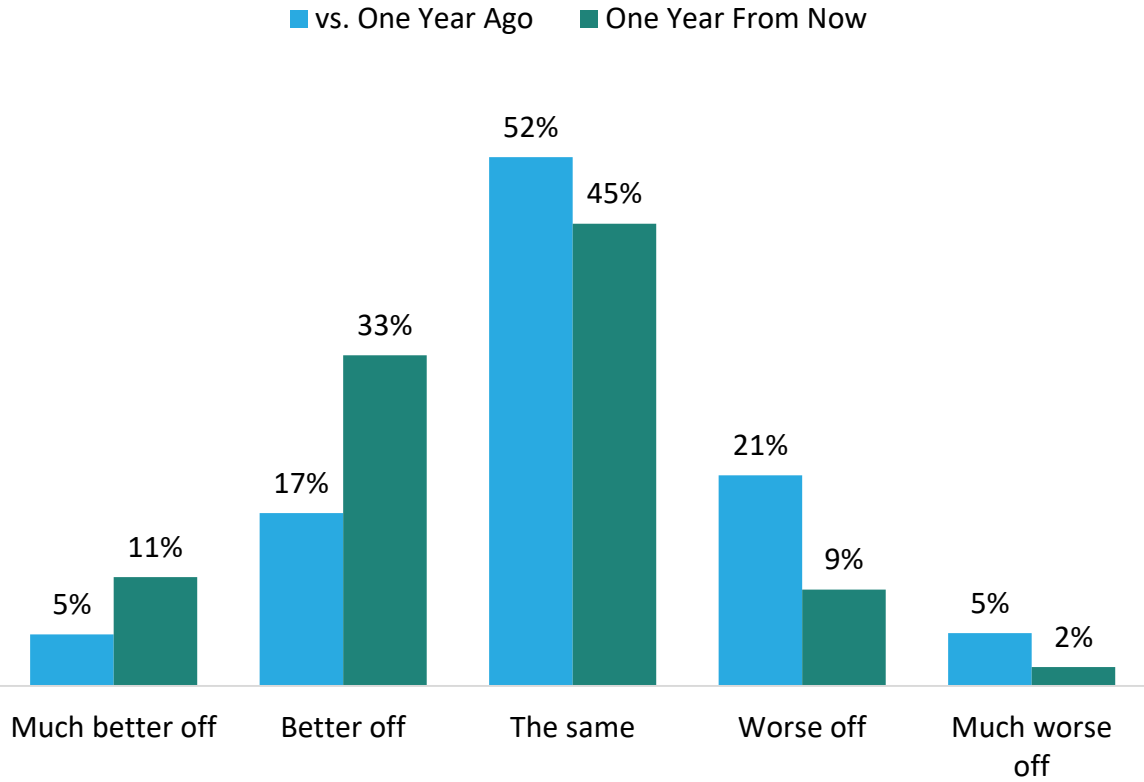
Outlook

- Consumer Confidence
- Projected Impact
- Anticipated Recovery Time

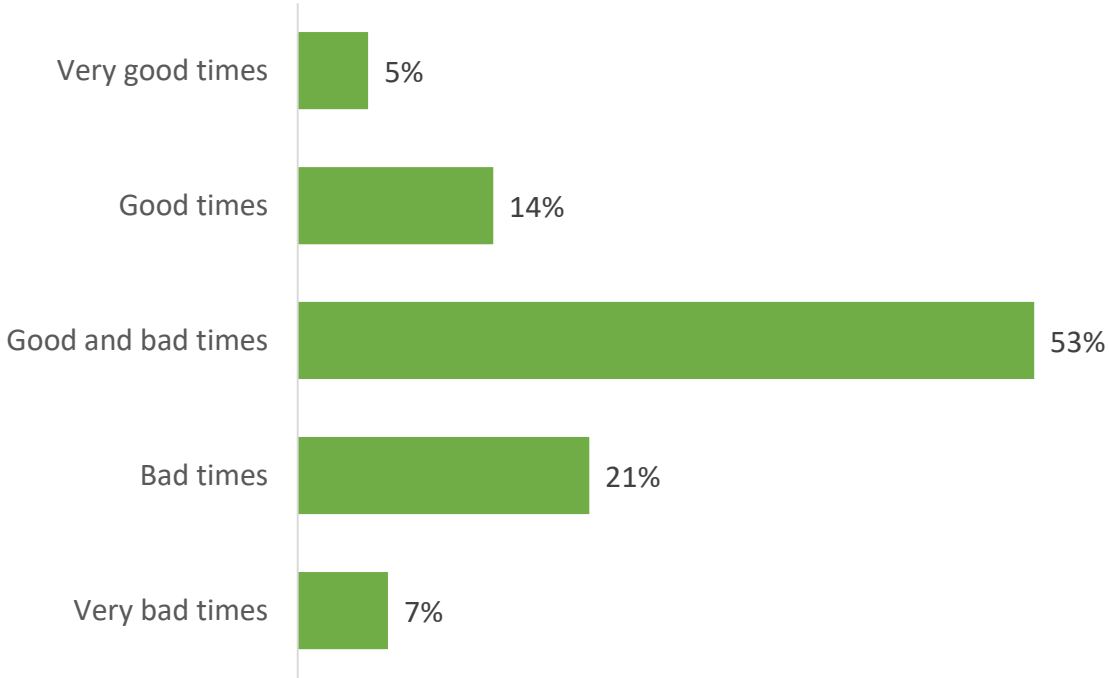


The American public’s long-term view of their own personal finances is steadfast in the face of a developing pandemic, with most expecting no significant change in their financial state, and just under half actually expecting to be in a better position overall.

Personal Financial State vs. One Year Ago, From Now



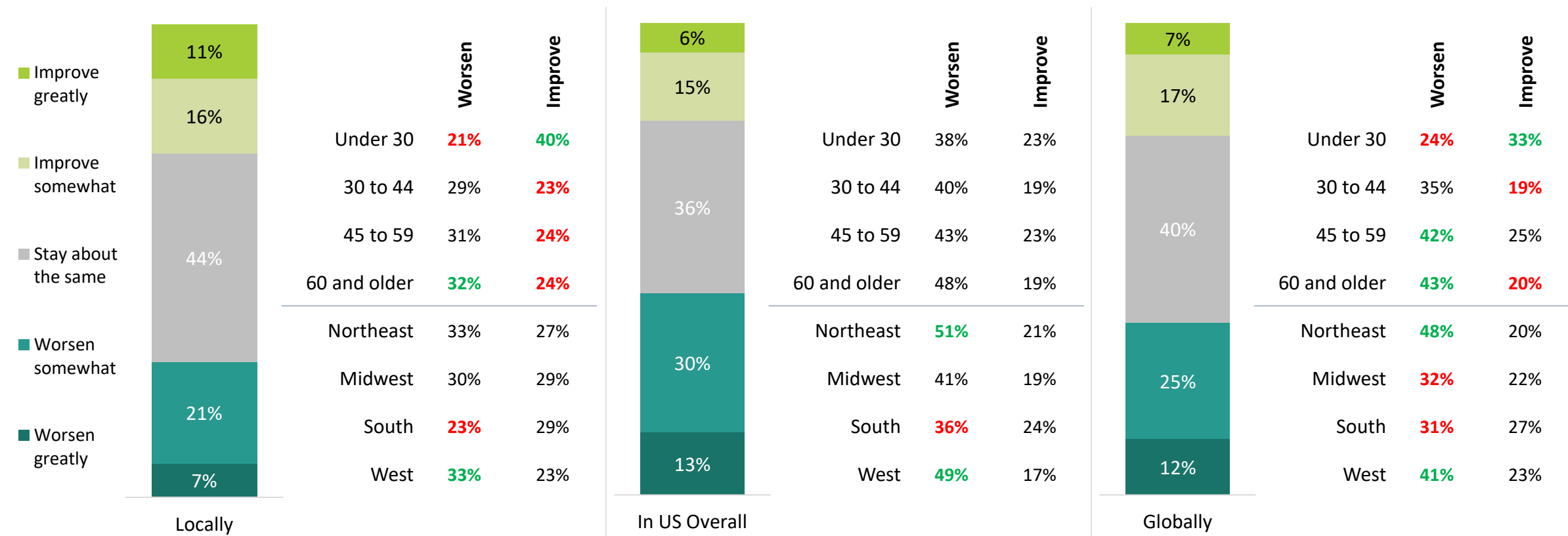
US Business Financial State Over Next 12 Months



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 remains generally flat at the local, national, and global levels this wave, although the youngest generation of Americans is more optimistic about the coming month, at least for their own communities.

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

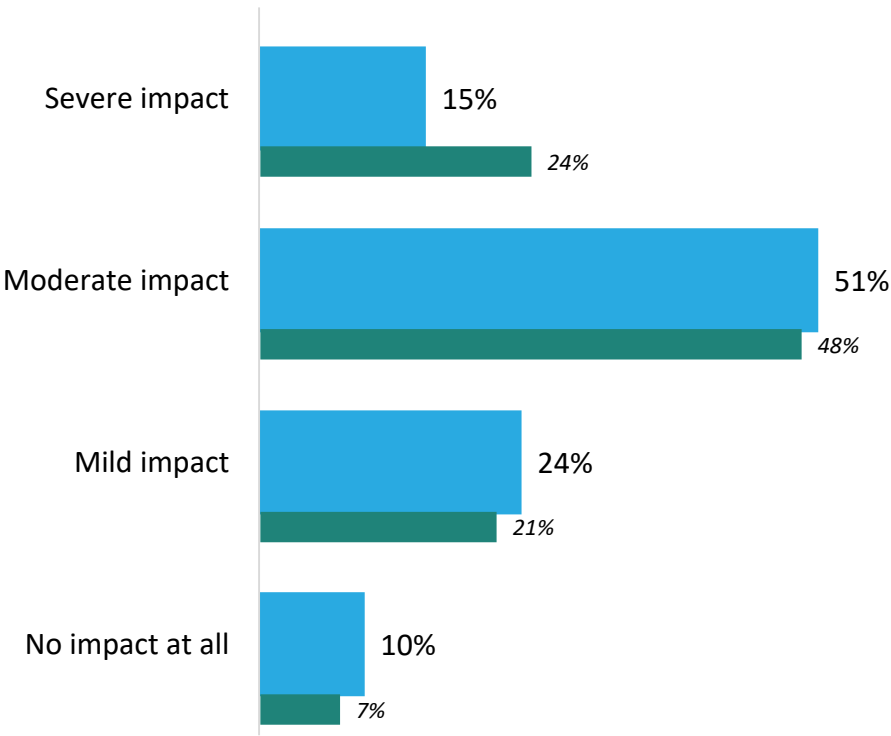


Q22 - Thinking locally, about the US overall, and globally, how do you expect the Coronavirus/Covid-19 situation to change in the next 30 days? Base: Total

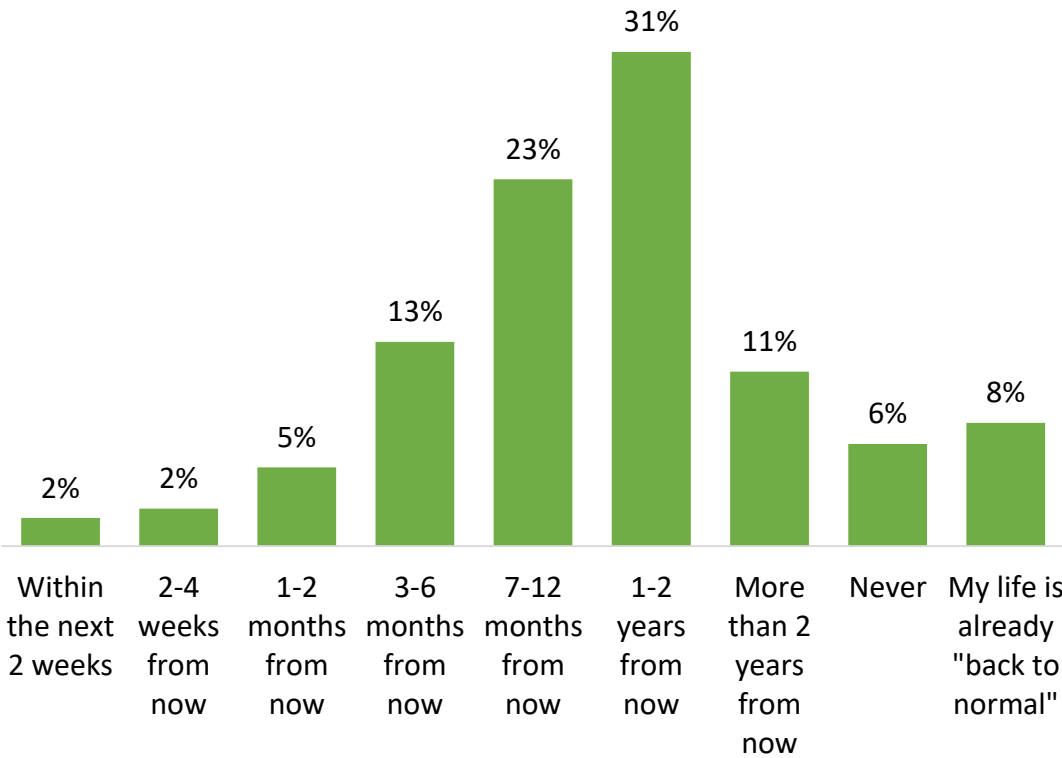
Two-thirds of Americans expect a non-trivial amount of disruption to their daily lives to continue through the next 30 days. Meanwhile, Americans embrace a longer-term expectation of when things will be “back to normal.”

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

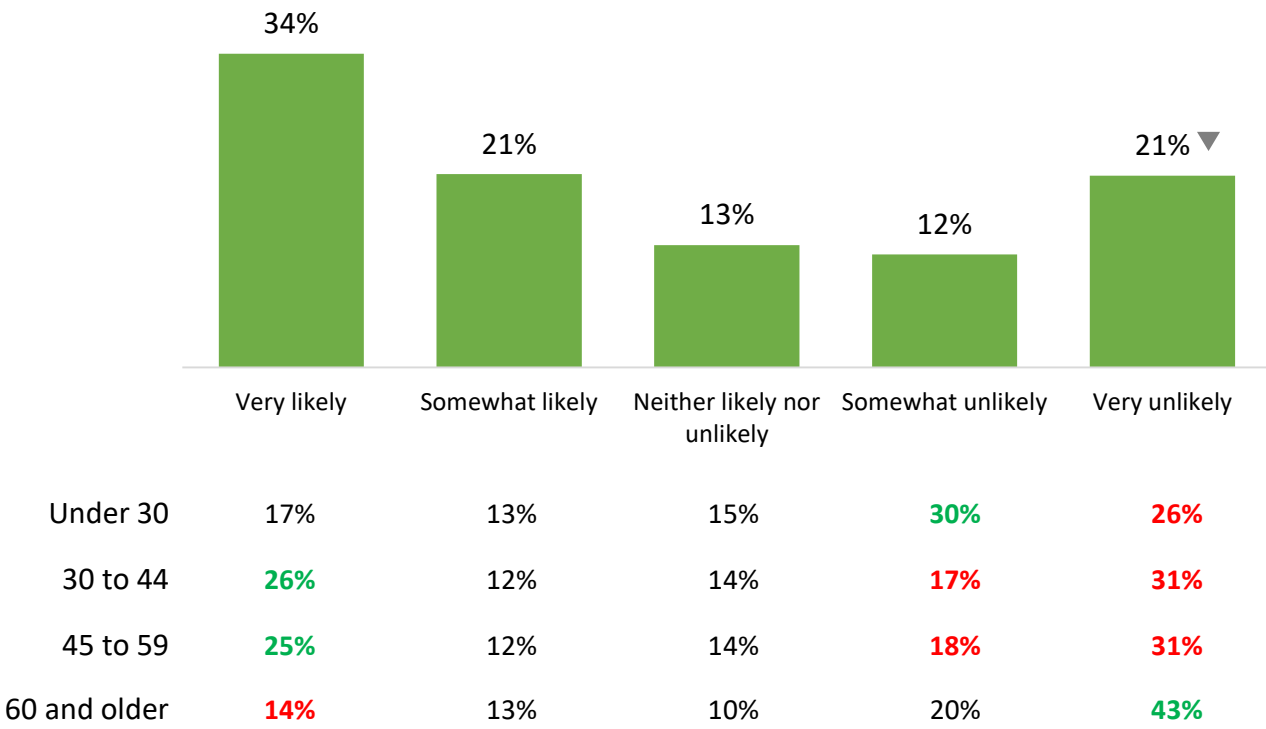
Pulse Topics

- Vaccine Interest

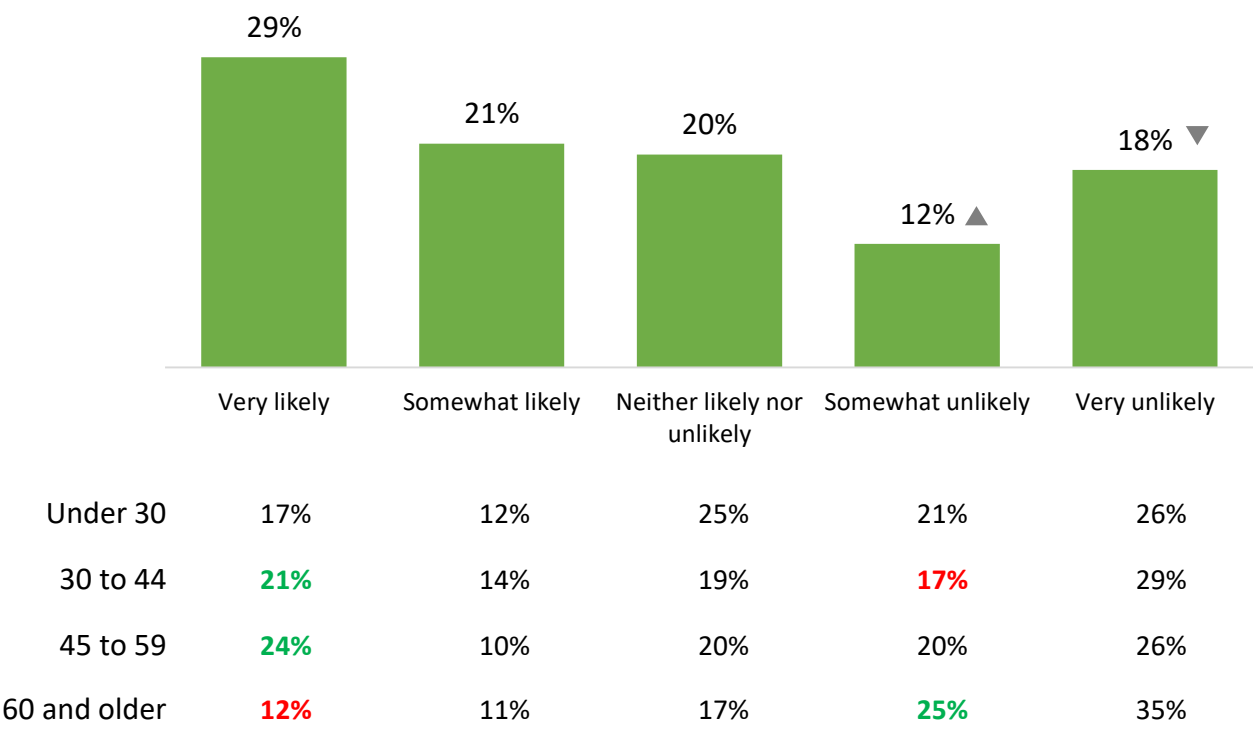


Most Americans remain supportive of using a vaccine if it were available today or intend to encourage others to get the vaccine.

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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