



Covid-19 Pandemic
Impact on US 2020
Holiday Season

| STUDY OVERVIEW

Objectives

To understand Americans' plans for the upcoming holiday season, especially as relates to gathering, traveling, and shopping/purchasing.

Methodology

Conducted as part of Wave 19 of aytm's ongoing Covid-19 Consumer Tracker:

An online survey was conducted among N=944 US adults and weighted to be reflective of the US population.* The survey 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.*

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.

Chart labels for 4% or less may be omitted for readability.

KEY FINDINGS

As with other disruptions experienced due to Covid-19, the 2020 holidays will be no exception. Three in five Americans are expecting the pandemic to have a moderate to major impact on their holiday plans.



Holiday Travel

Nearly half of Americans plan to **reduce their holiday travel**.

For those planning to travel, **car is the preferred mode of transportation** while **public transportation and air travel will be avoided** by most.



Holiday Gatherings

Holiday gatherings will also be limited with **one-half of US consumers not planning to visit with people they typically do**.

While **small group gatherings are more expected** this year than larger ones, older Americans as well as those living in the West are more likely to avoid both.

One-third of **consumers plan to utilize digital methods for connecting with their family and friends**.



Holiday Shopping

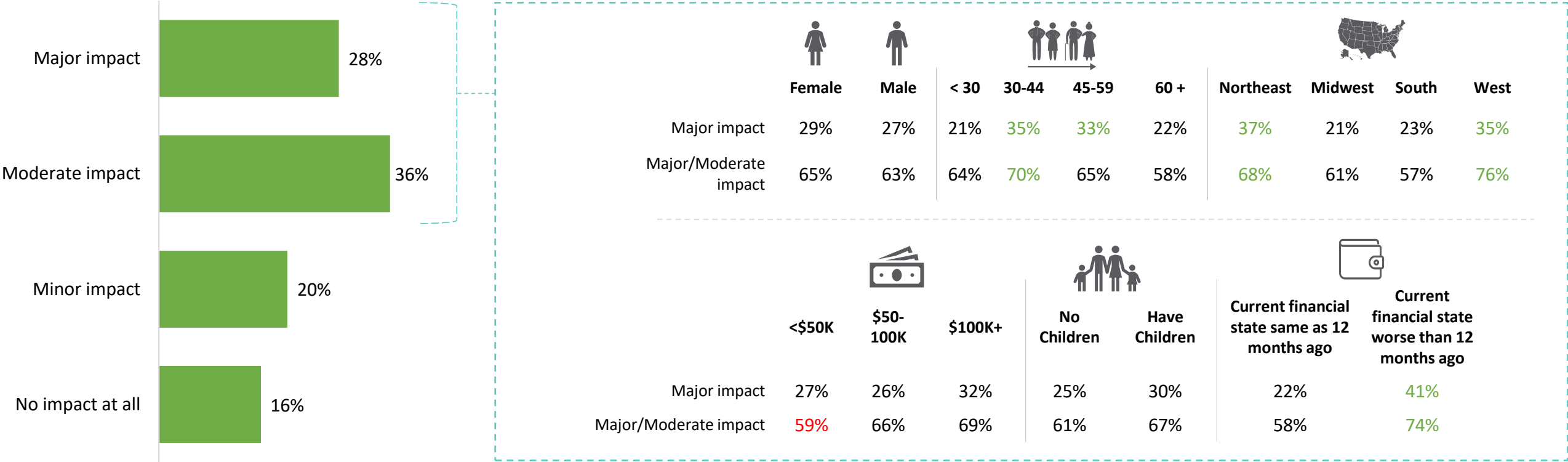
One-half of US consumers intend to do less in-store shopping. This is especially evident among older consumers.

Consumers plan to utilize online shopping for their holiday needs and are more likely to turn to online promotions such as Black Friday sales or Cyber Monday.



Three in five US consumers say that the pandemic will have a moderate to major impact on their holiday plans, especially for those experiencing a financial hardship this year.

Covid-19's Impact on 2020 Holiday Plans



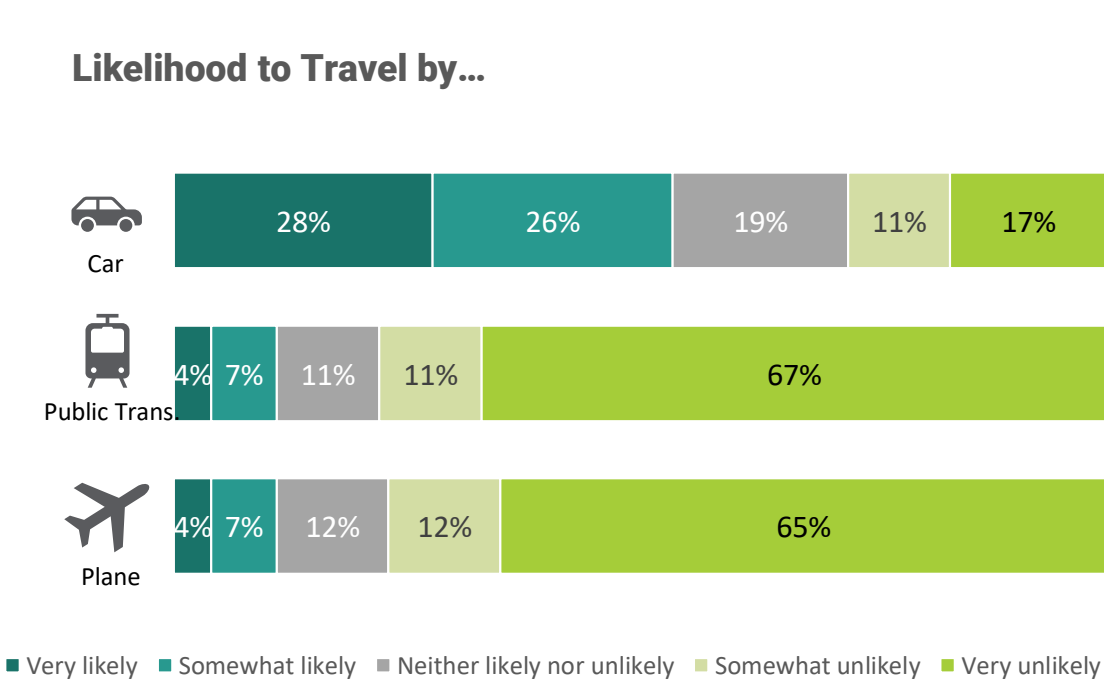
Nearly half of Americans will not travel as much or as far as they normally do this holiday season and most plan to use their car when they do. While the majority plan to avoid using public transportation or air travel, females and older consumers show the biggest hesitancy. Personal finances also play a role, as those who feel their financial state is worse as a result of the pandemic are also less likely to travel by plane or use public transportation.





2020 Holiday Travel


45%

of US consumers will NOT travel as much or as far as they normally do





										
	Female	Male	< 30	30-44	45-59	60 +	NE	MW	S	W
Likely (T2B)	51%	56%	62%	59%	53%	43%	54%	57%	56%	47%
Unlikely (B2B)	29%	26%	19%	21%	26%	41%	26%	25%	28%	30%
Likely (T2B)	7%	15%	17%	12%	11%	6%	19%	14%	6%	11%
Unlikely (B2B)	83%	72%	67%	76%	78%	88%	67%	75%	84%	78%
Likely (T2B)	9%	13%	17%	17%	7%	5%	15%	15%	8%	9%
Unlikely (B2B)	80%	74%	69%	69%	82%	86%	66%	75%	81%	79%



Consumers who feel their financial state is worse off than 12 months ago due to Covid-19 are less likely to travel this Holiday season, especially by plane or public transpiration.

Holiday gatherings will also not look the same this year, with one-half of Americans not planning to visit with people they typically do. Small group gatherings are more likely than larger ones. Older consumers as well as those living in the West are more likely to avoid holiday gatherings, no matter the group size. A third of consumers plans to connect with their loved ones digitally instead.

2020 Holiday Gatherings

52%

will NOT be seeing/visiting with people they typically would

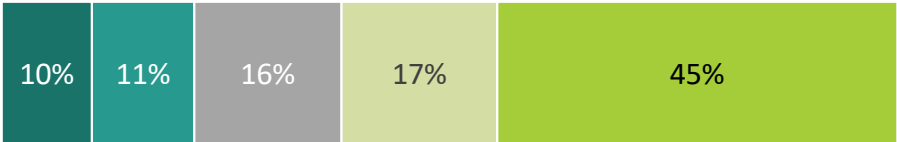
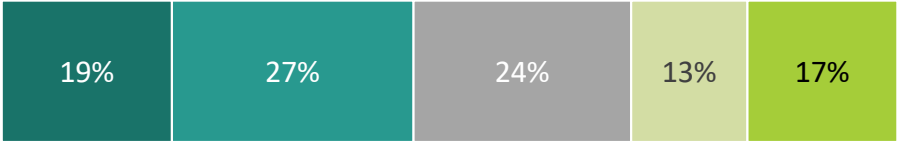
49%

will NOT be attending as many events





34%

plan to connect with friends/family digitally

Likelihood to Participate in Holiday Family or Friend Gatherings ...



Very likely
Somewhat likely
Neither likely nor unlikely
Somewhat unlikely
Very unlikely

										
	Female	Male	< 30	30-44	45-59	60 +	NE	MW	S	W
Likely (T2B)	48%	44%	55%	52%	35%	44%	49%	48%	45%	43%
Unlikely (B2B)	29%	31%	22%	20%	39%	36%	26%	23%	31%	36%
Likely (T2B)	20%	23%	31%	30%	15%	13%	26%	30%	16%	19%
Unlikely (B2B)	66%	58%	52%	54%	66%	74%	56%	57%	65%	67%

Stores will experience less traffic this Holiday season as one-half of shoppers intend to do less in-store shopping. Older consumers are especially more likely to avoid physical stores. For Holiday deals, consumers are more likely to turn to online promotions such as “Black Friday” sales or Cyber Monday.

2020 Holiday Shopping

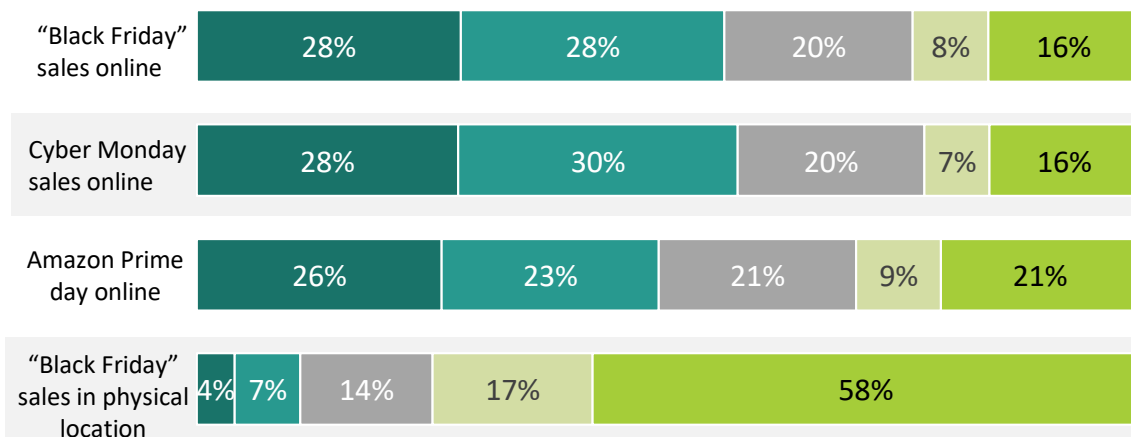
will be doing **less in**
store shopping

will be doing **more**
internet-based
shopping

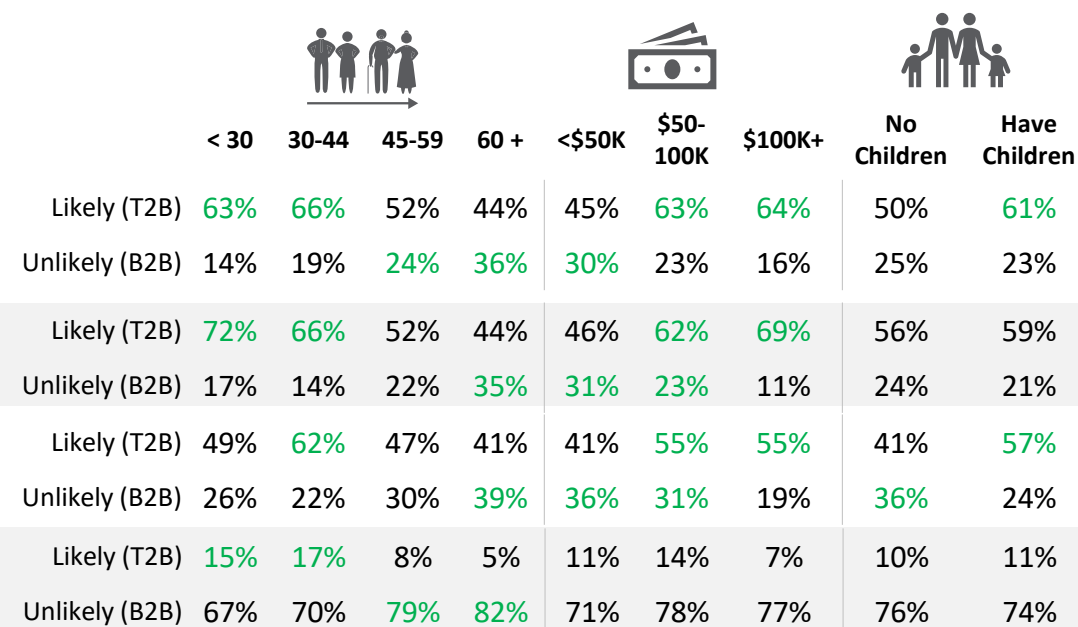
will **NOT** be spending as much money on gifts



Likelihood to Shop ...



Very likely Somewhat likely Neither likely nor unlikely Somewhat unlikely Very unlikely



Older consumers (60+) as well as those with children are especially less likely to be doing in-store Holiday shopping this year.

Questions?



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