



Covid-19 Pandemic Impact on US Consumers

W24 | March 4th – 5th, 2021

| 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 twenty first wave of aytm's Covid-19 Consumer Tracker fielded Thursday, March 4th– Friday, March 5th, 2021 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.

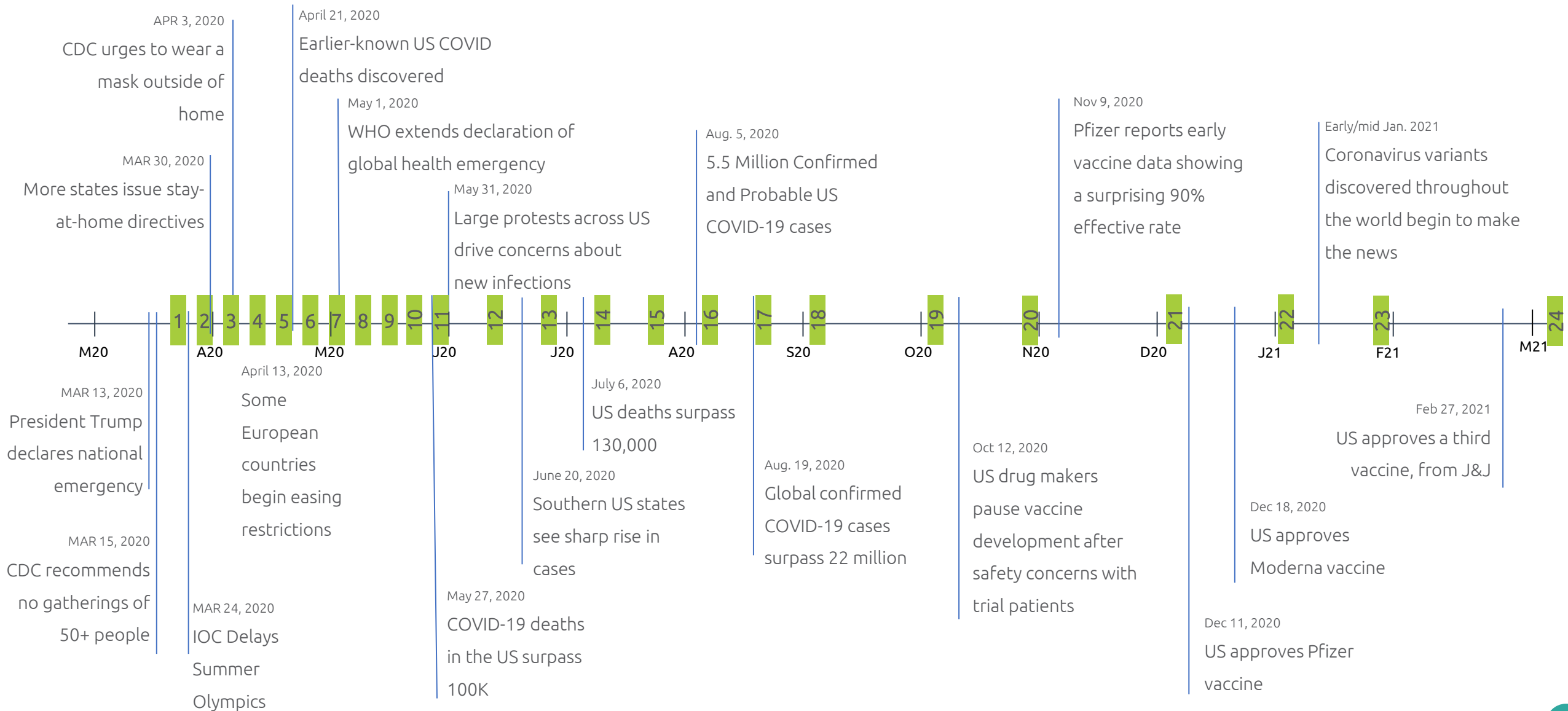
All significance testing is conducted at 95% confidence level (Base = 1,000 for Total sample).

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



Covid-19 Wave 24 KEY FINDINGS

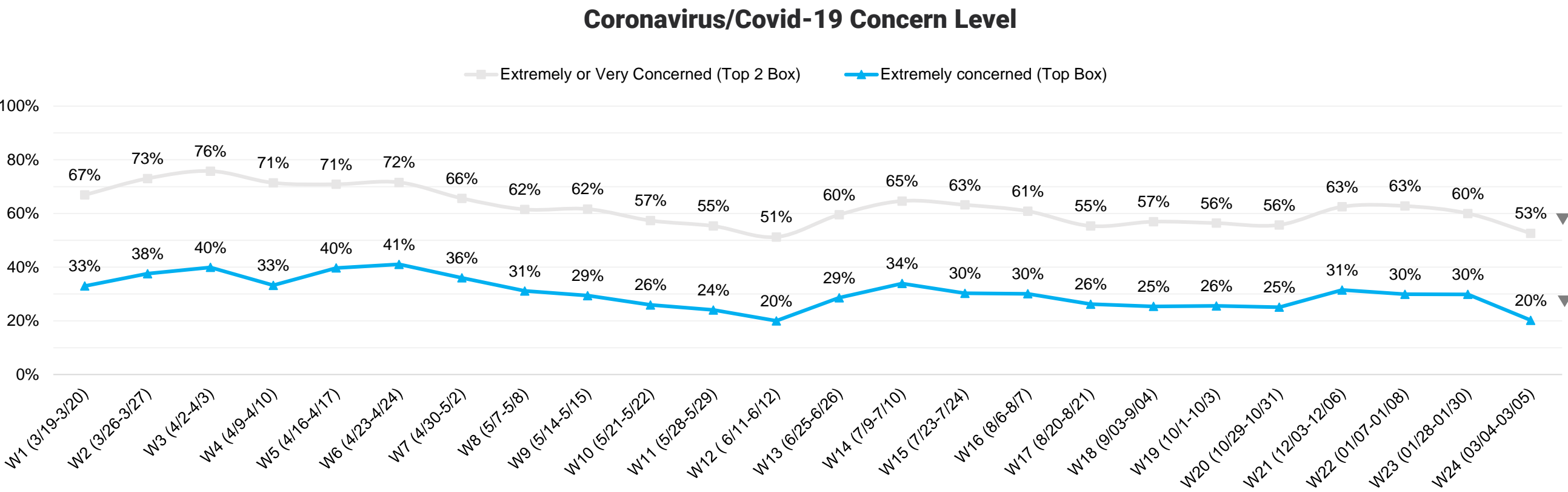
- With new vaccines coming available to more Americans throughout February and early March, and with Covid-19 case counts continuing to decline from a peak earlier in the winter, national concern over the Covid-19 pandemic falls near its lowest point since the tracker's beginning.
 - Around half of Americans are concerned to some degree and just one in five are extremely concerned about the pandemic. These rates are on par with the lowest numbers seen in the summer of 2020, and come after the steepest single-month decline in anxiety yet recorded.
 - Despite the easing of acute concern, Americans still place Covid-19 at the top of the list of most-pressing social issues from among several other major societal concerns.
- Impacts on daily life remain consistent and prevalent. One in ten Americans continues to face job loss due to Covid-19 and many more are still coping with reduced wages or earnings. Around three-quarters of Americans report a severe or moderate impact to their daily lives, although the number expecting these impacts to continue through the next 30 days falls to 60 percent.
- From a 30-day outlook perspective, Americans grow sharply more optimistic. Many more Americans are expecting improvements in their local communities, across the country, and globally throughout the next few weeks.
- Intent to get a vaccine is high among 60 percent of those not currently vaccinated, and, similarly, six in 10 Americans are likely to encourage others to get vaccinated as well.
- The expected time until things could return to normal has flattened in March at around 13 months.

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



With cases dropping significantly across much of the country and as a result of continuing progress in vaccine distribution, pandemic concern falls in March to its lowest point since the summer of 2020. March brings the sharpest single-month decline in concern since the tracker began.



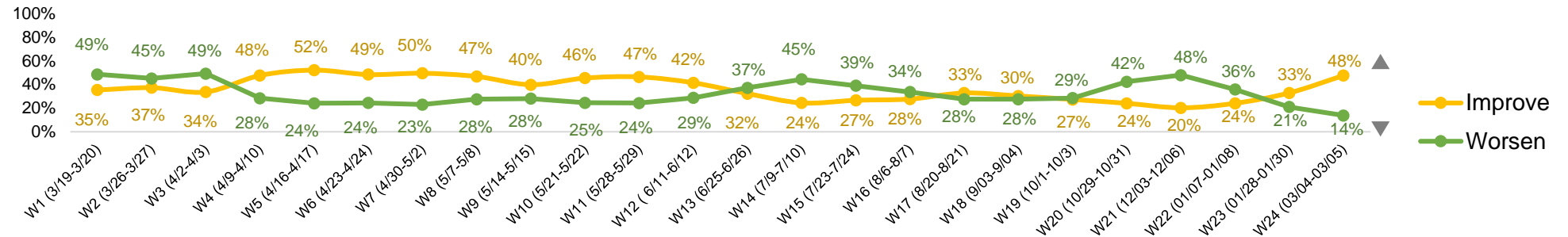
Q7 - Overall, how would you characterize your current level of concern about the Coronavirus/Covid-19 situation? Base: Total



Anticipated Change in Coronavirus/Covid-19 Situation

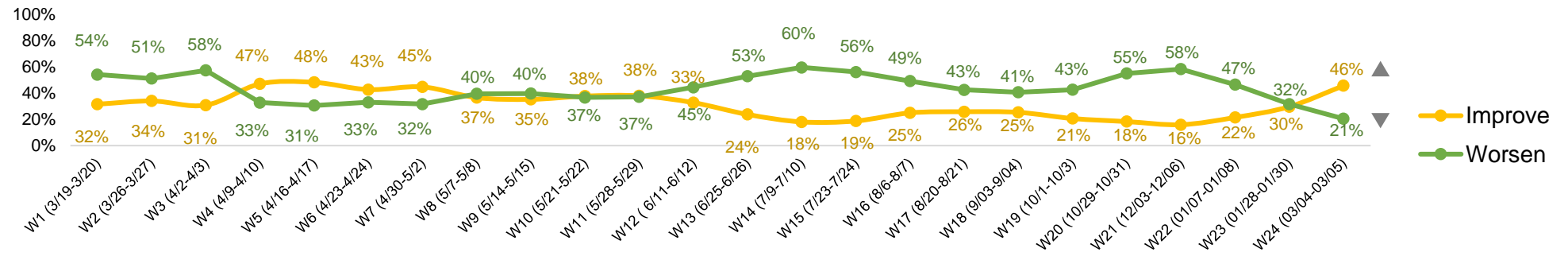
Accompanying an overall decline in concern, Americans grow significantly more optimistic about how the pandemic will unfold in their local communities over the next 30 days.

Change Locally in Next 30 Days



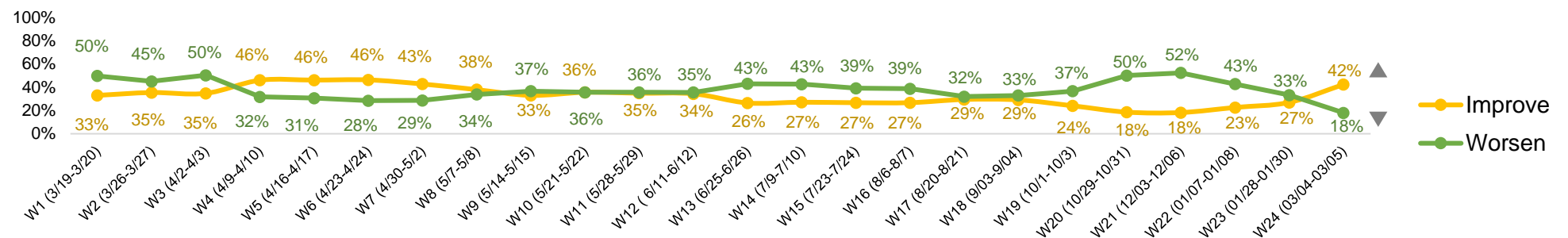
Americans are similarly hopeful about the next 30 days across the country.

Change in US Overall in Next 30 Days



The global 30 day outlook improves commensurately, as well.

Change Globally in Next 30 Days

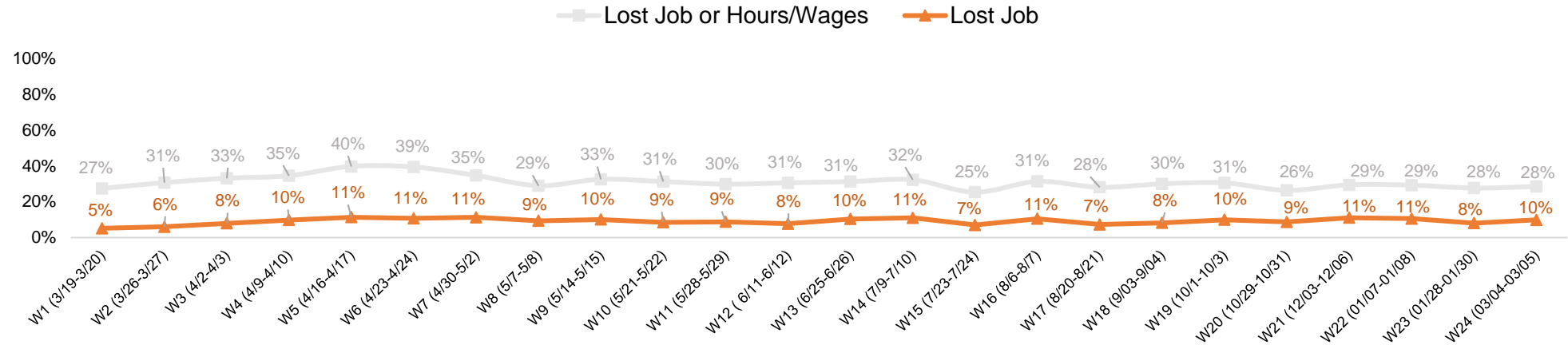


Q22 - Thinking locally, about the US overall, and globally, how do you expect the Coronavirus/Covid-19 situation to change in the next 30 days? Base: Total

Employment, Financial Impact of Coronavirus/Covid-19

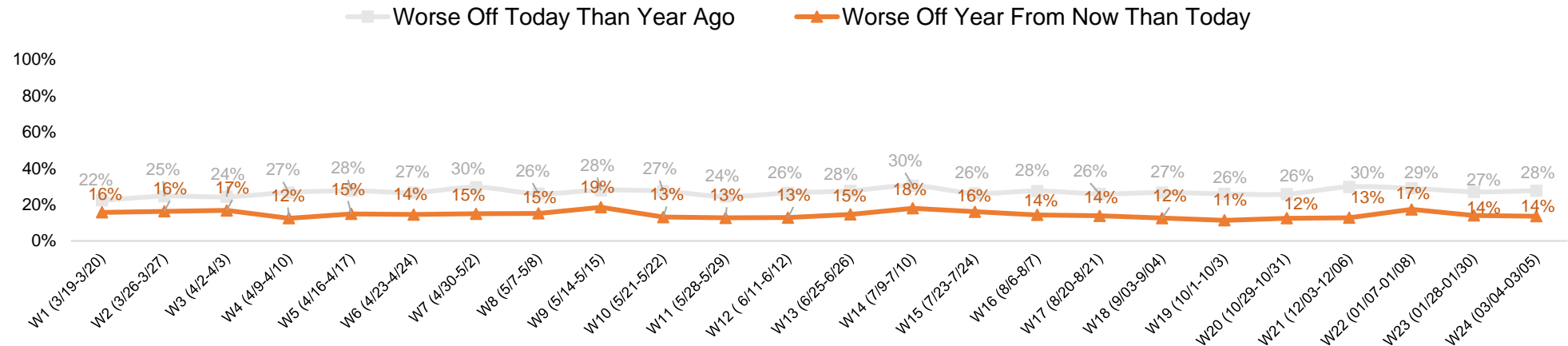
While Americans are largely feeling lower levels of anxiety related to the pandemic, actual employment effects are virtually unchanged.

Coronavirus/Covid-19 Impact on Employment



Likewise, there is little to no change in how Americans expect their financial state to change within the next year.

Personal Financial State vs. One Year Ago, From Now

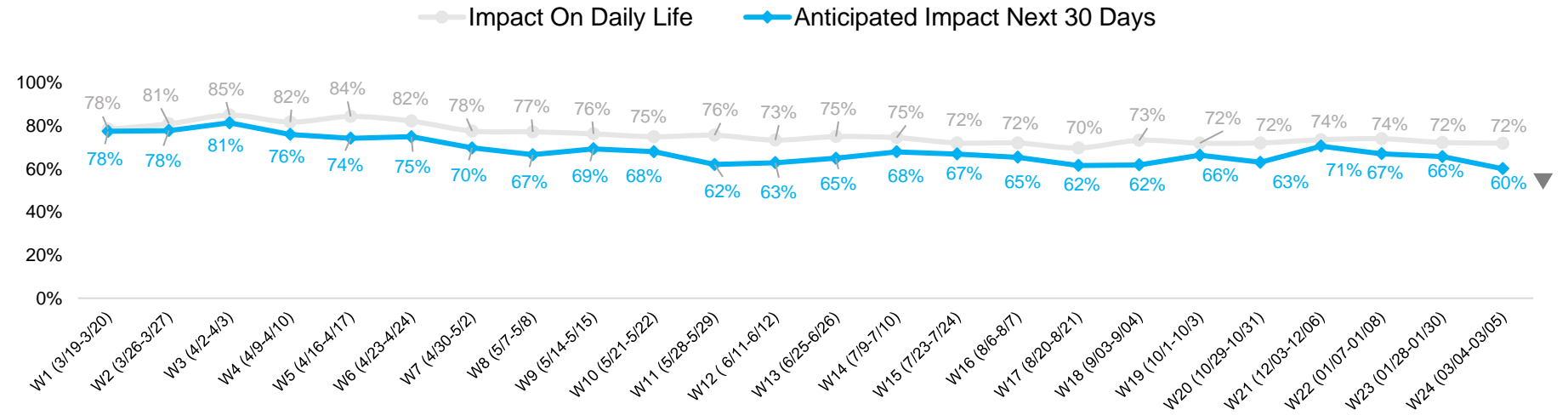


Q19 - At any point, did you lose a job or were your job hours or salary negatively affected by the Coronavirus/Covid-19 situation? Base: Total | Q2 - Would you say that you/your family are better or worse off financially than you were a year ago? / Q3 - Now looking to the future: Do you think one year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

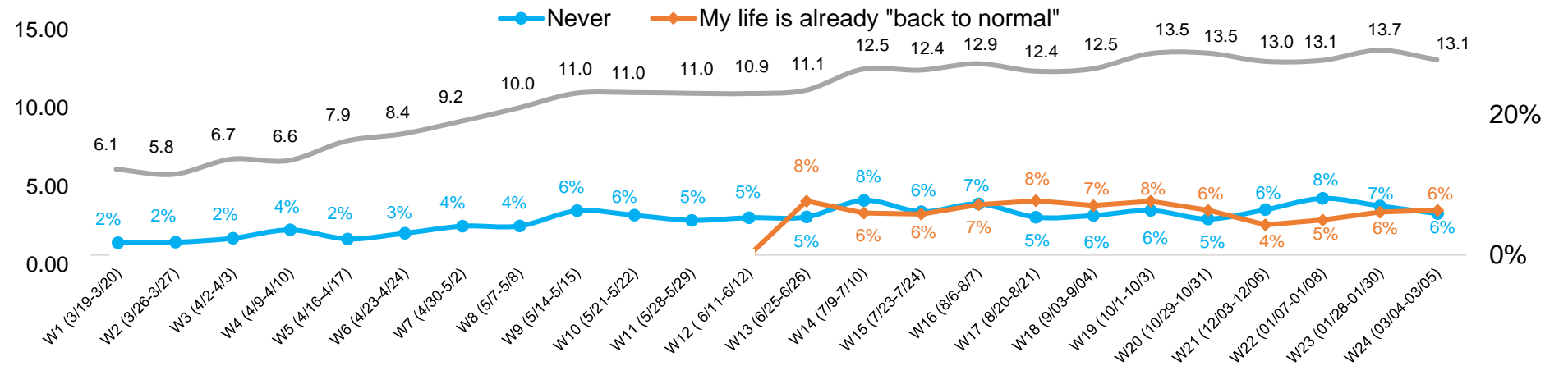
Impact, Estimated Timeline of Coronavirus/Covid-19

Reported pandemic-related impacts to date are steady, but fewer Americans expect severe/moderate impacts to continue in the coming month.

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



Anticipated "Back to Normal" Timeline



The time until Americans expect things to "return to normal" remains high at 13.1 months.

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

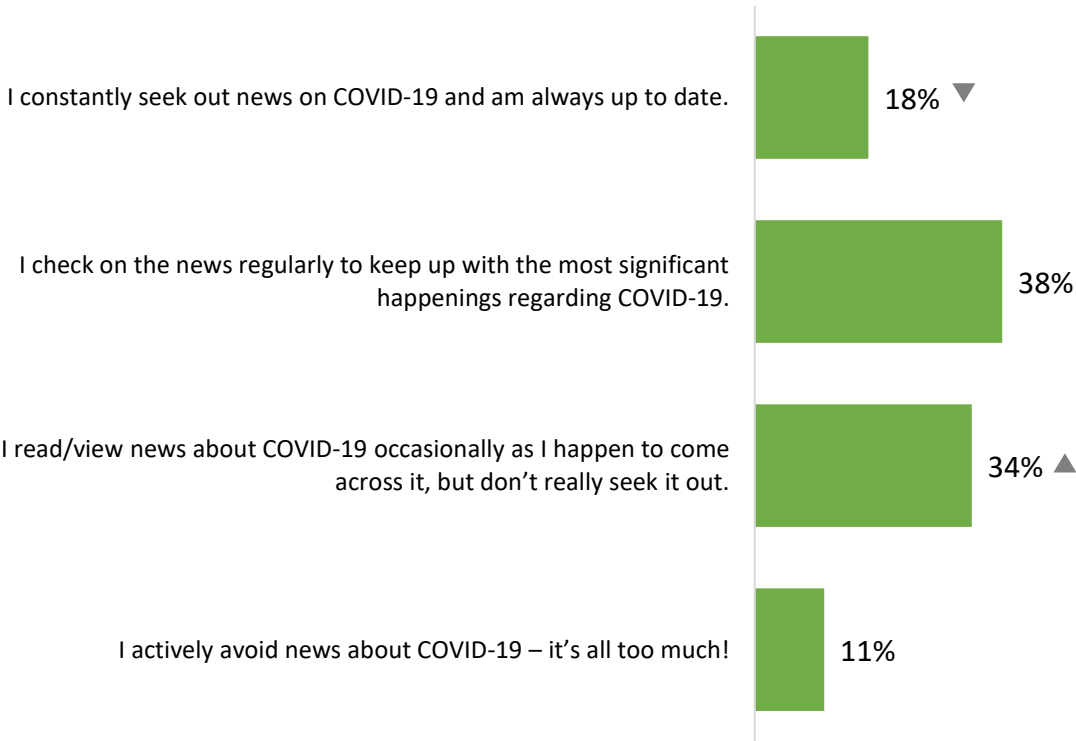
Awareness, Perceptions, Concerns

- Covid-19 Awareness, Concern
- Health Concerns
- Economic Concerns
- Perceived Severity
- Impact on daily life

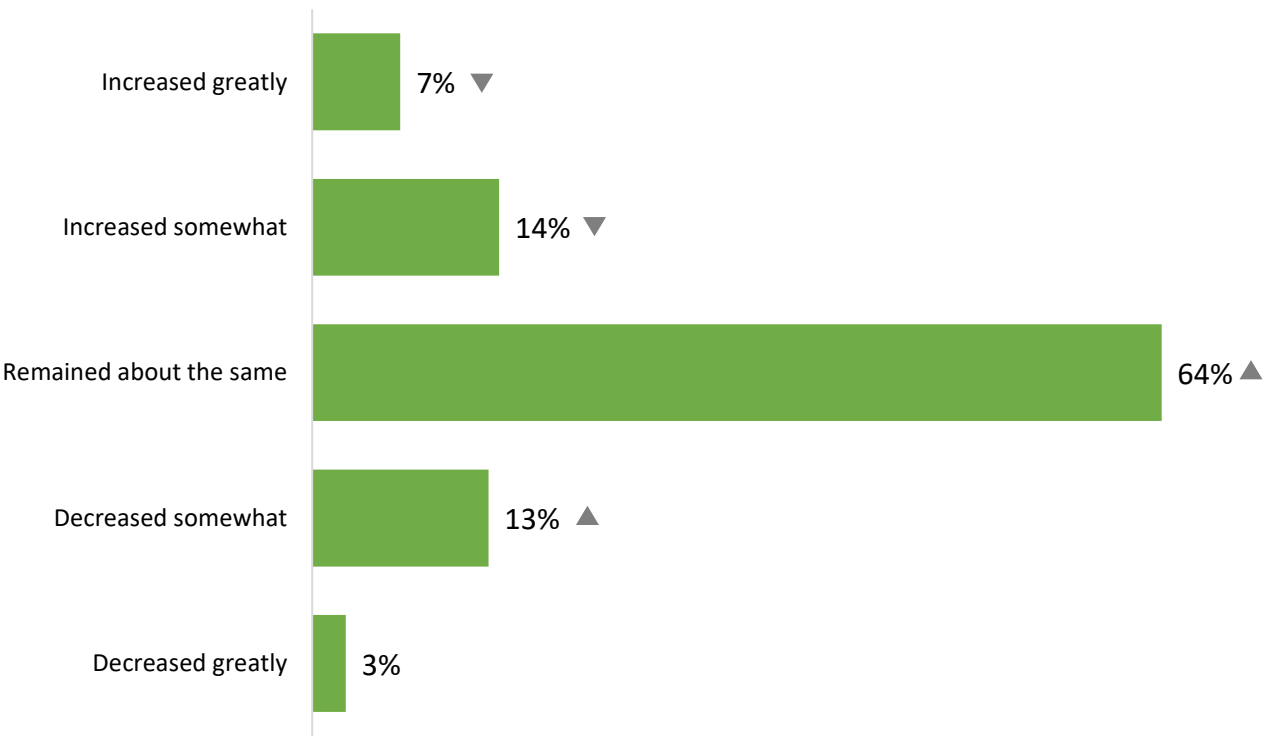


Americans are less tied into pandemic-related news in March, and say they've consumed less Covid-19 news overall.

Attitudes toward News about Covid-19

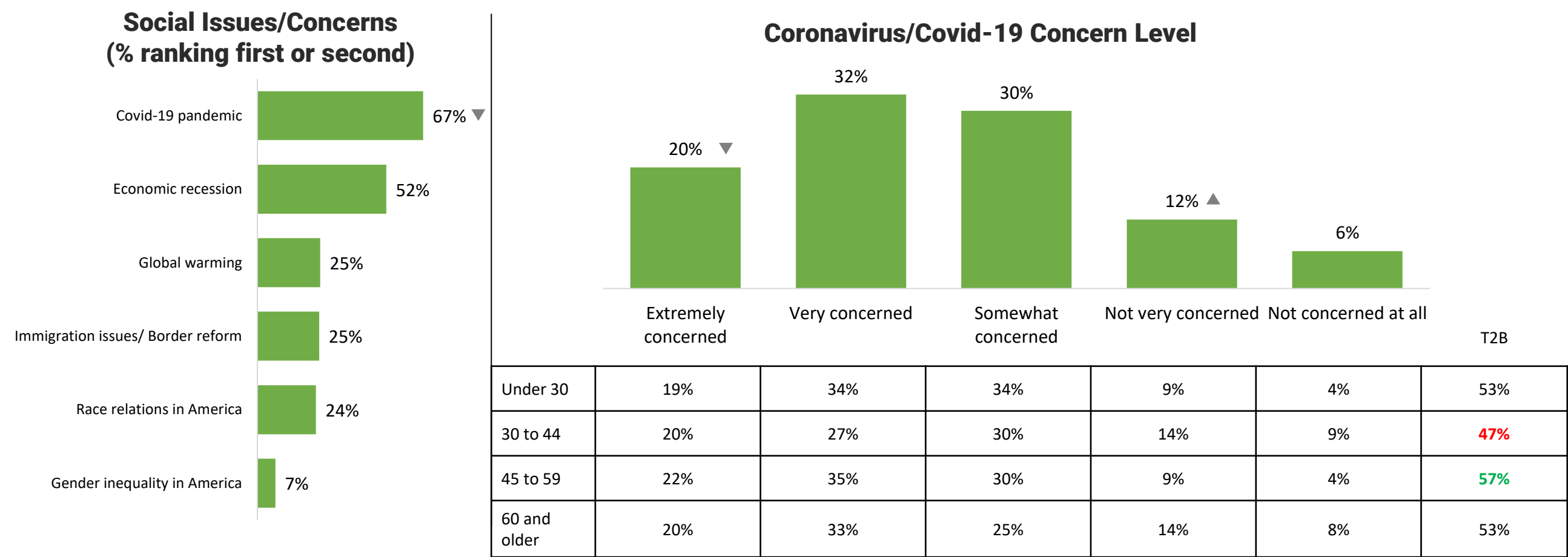


Change in Amount of News Consumed about Covid-19



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

Covid-19 continues as the most concerning social issue facing Americans today when compared to other leading challenges. The 45-59 age group remains the most concerned about the pandemic.

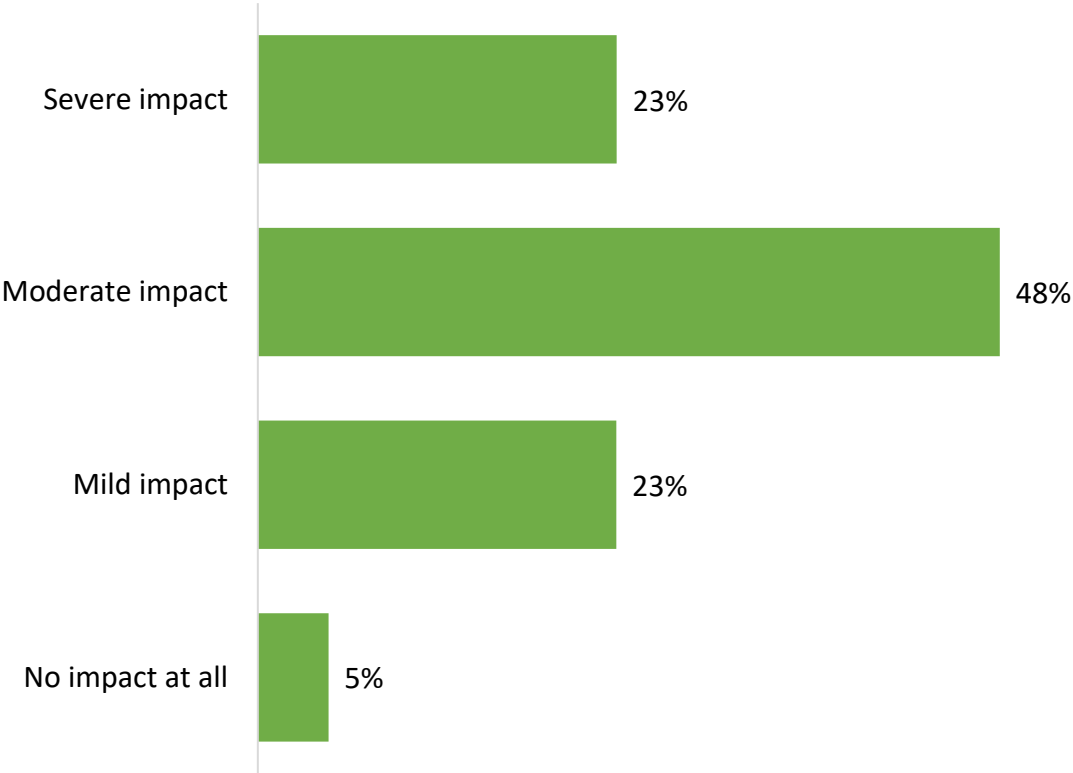


Q1b - Please rank the issues below from the one that you are most concerned about to the one you are least concerned about. Base: Total
Q7 - Overall, how would you characterize your current level of concern about the Coronavirus/Covid-19 situation? Base: Total



Three-quarters of the public report at least moderate impacts to their daily life as a result of Covid-19. Younger Americans are more likely to report significant impacts, as are those in the Northeast.

Coronavirus/Covid-19 Impact on Daily Life



	Under 30	30 to 44	45 to 59	60 and older
Severe	26%	24%	26%	19%
Severe or Moderate	79%	72%	73%	66%

	Under \$50k	\$50K to \$100K	\$100K or more
Severe	27%	20%	22%
Severe or Moderate	71%	68%	78%

	Northeast	Midwest	South	West
Severe	26%	19%	22%	28%
Severe or Moderate	80%	69%	67%	77%

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



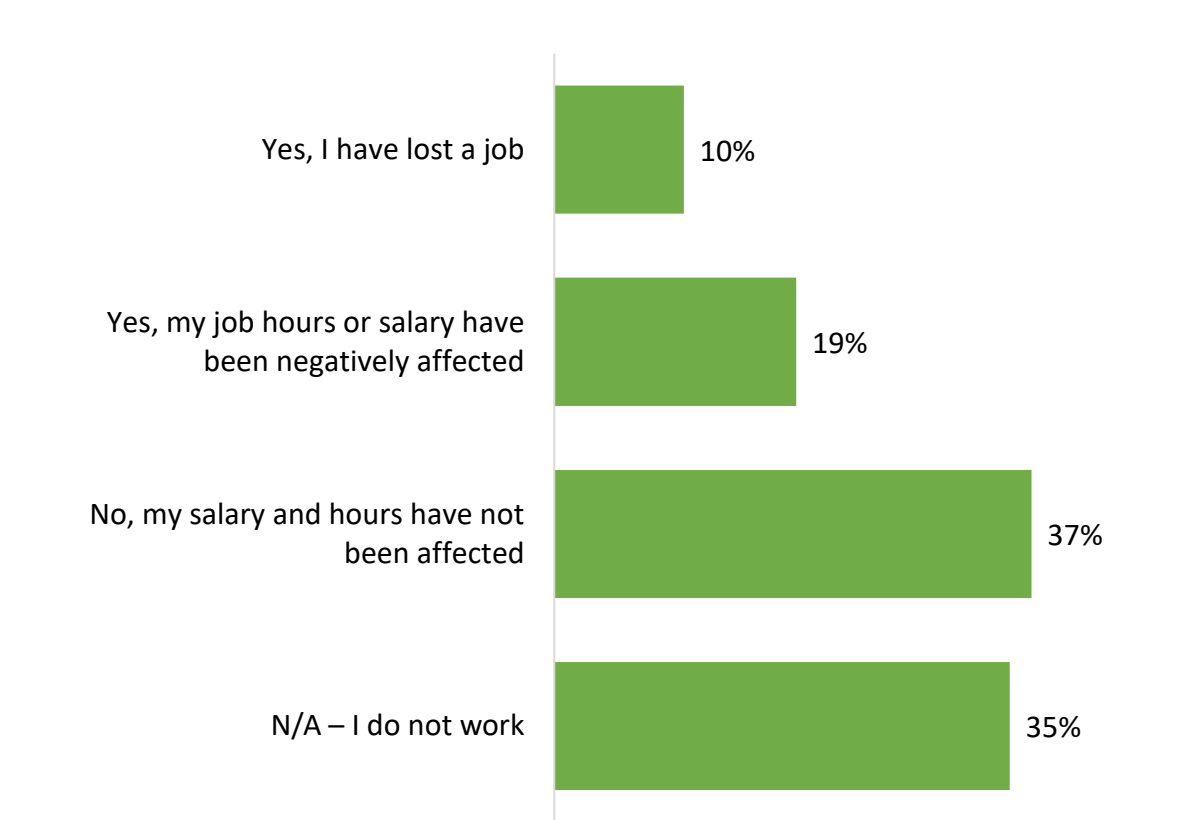
Employment Impact

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



Job losses related to Covid-19 continue to affect about 1 in 10 Americans, with 19 percent reporting other negative impacts to their regular salary, wages, or hours.

Coronavirus/Covid-19 Impact on Employment



	Under 30	30 to 44	45 to 59	60 and older
Lost Job	16%	12%	10%	4%
Lost Job or Wages	37%	32%	31%	16%

	Male	Female
Lost Job	10%	10%
Lost Job or Wages	29%	28%

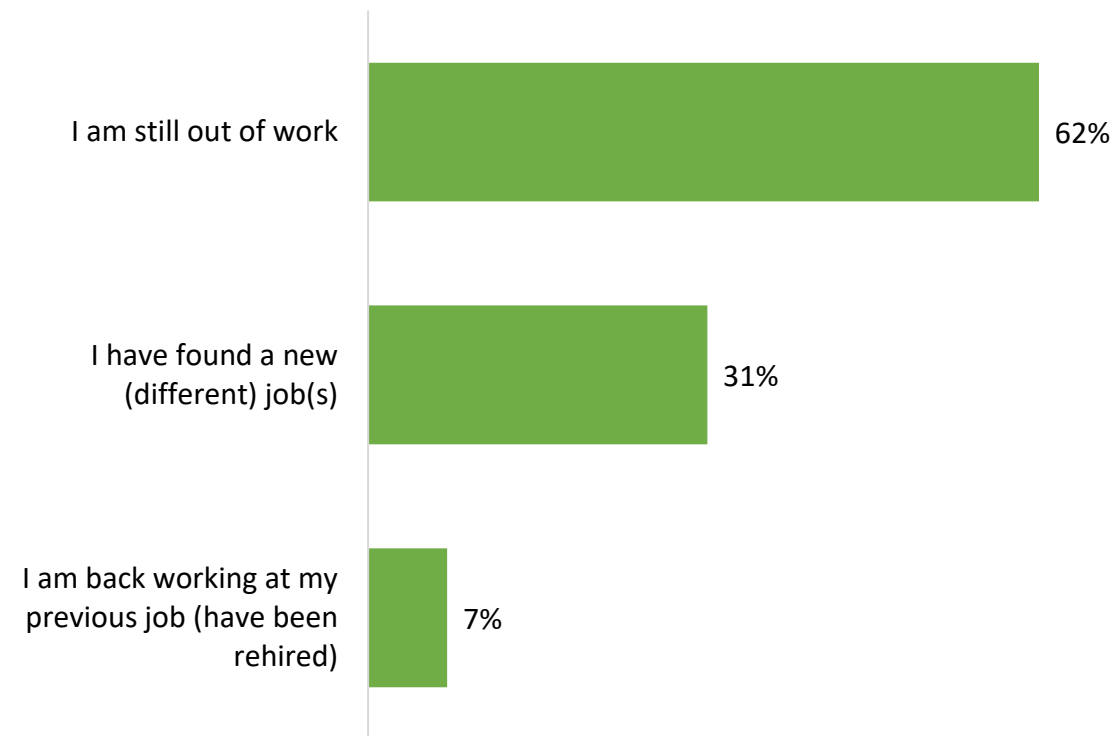
	Northeast	Midwest	South	West
Lost Job	10%	10%	7%	15%
Lost Job or Wages	27%	30%	24%	35%

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

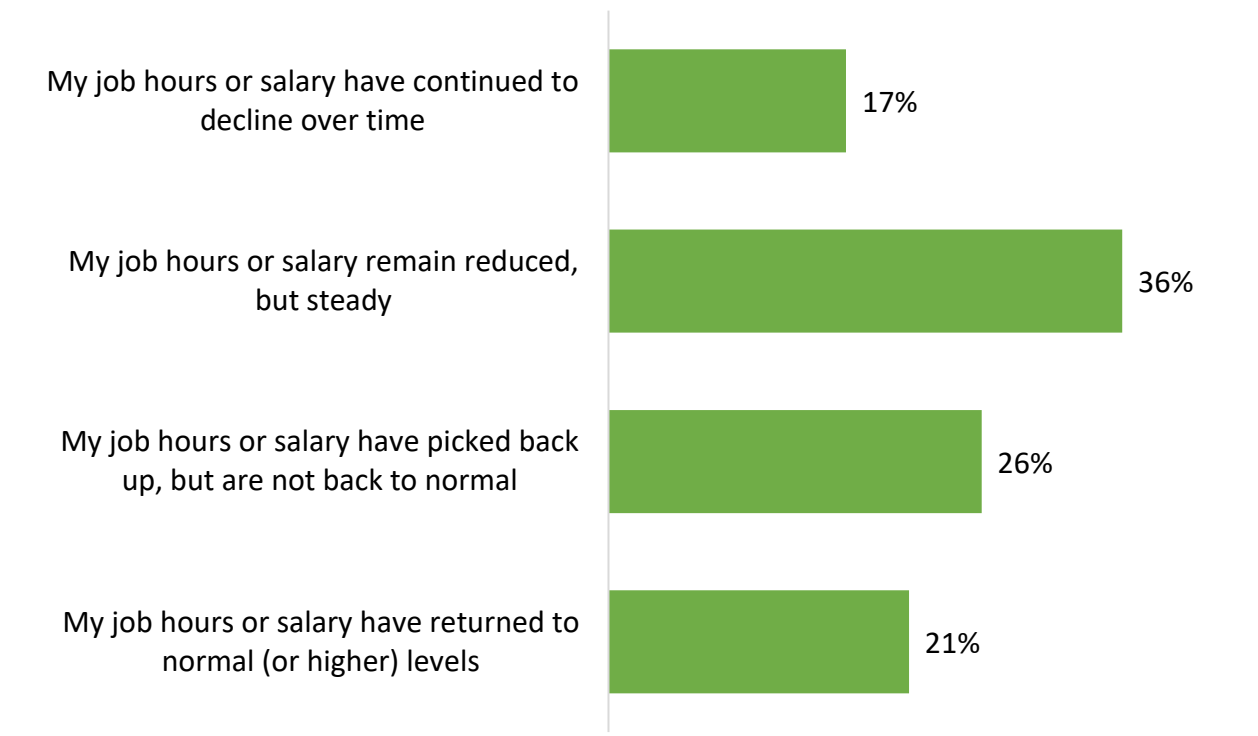


Of those who indicated their employment has been negatively impacted by Covid-19, the majority continue to face those hardships today. Over 60 percent of those who had lost a job remain out of work and just under 80 percent have yet to see their hours or wages return to normal levels.

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

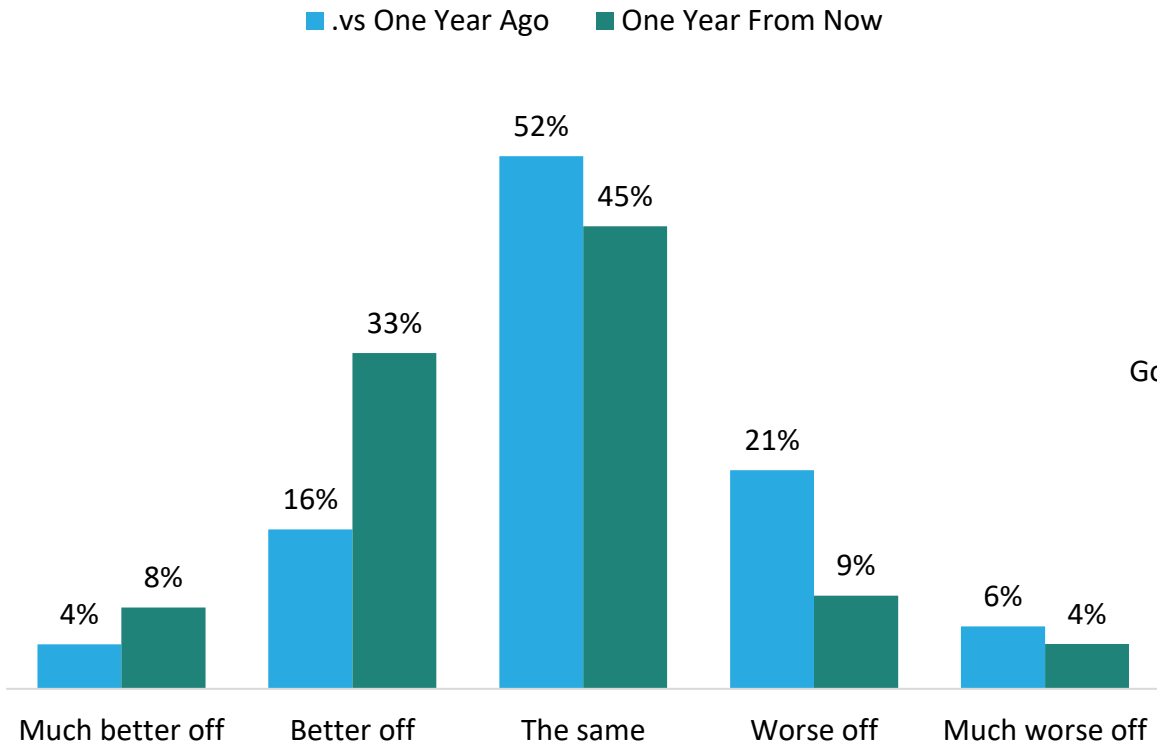
Outlook

- Consumer Confidence
- Projected Impact
- Anticipated Recovery Time

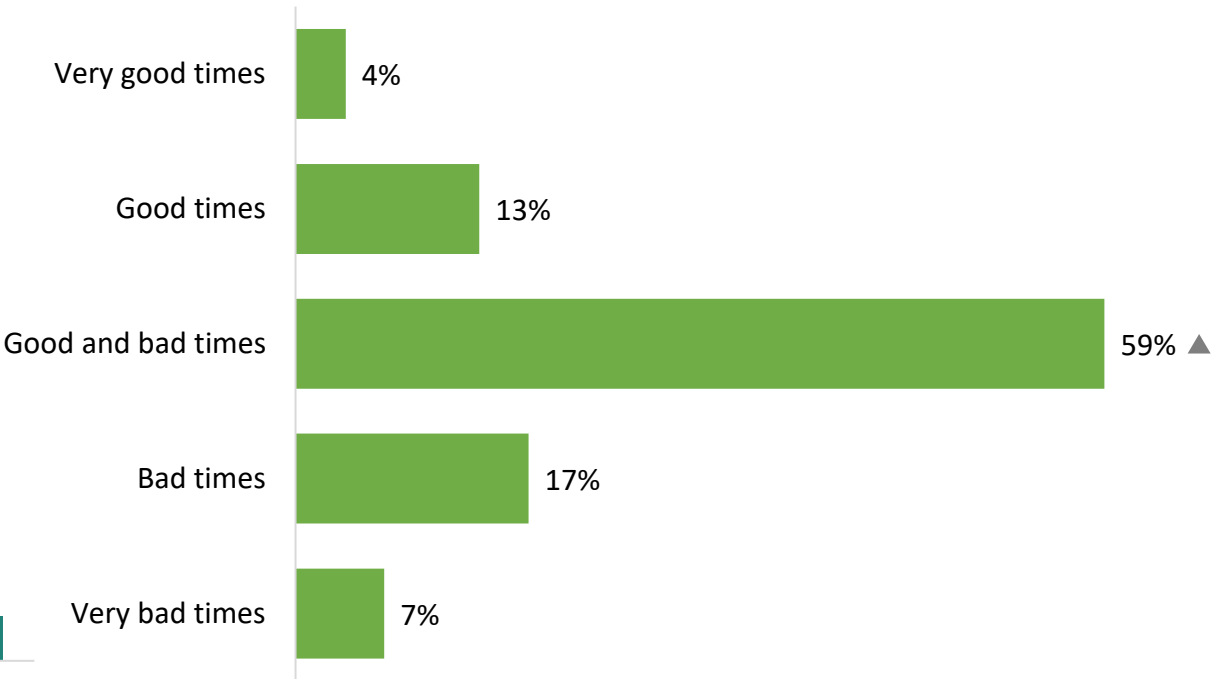


One quarter of Americans are currently facing worse financial times than they were one year ago, but 40 percent expect to be better off or much better off a year from now. Most Americans continue to expect a mix of good and bad developments for US businesses.

Personal Financial State vs. One Year Ago, From Now



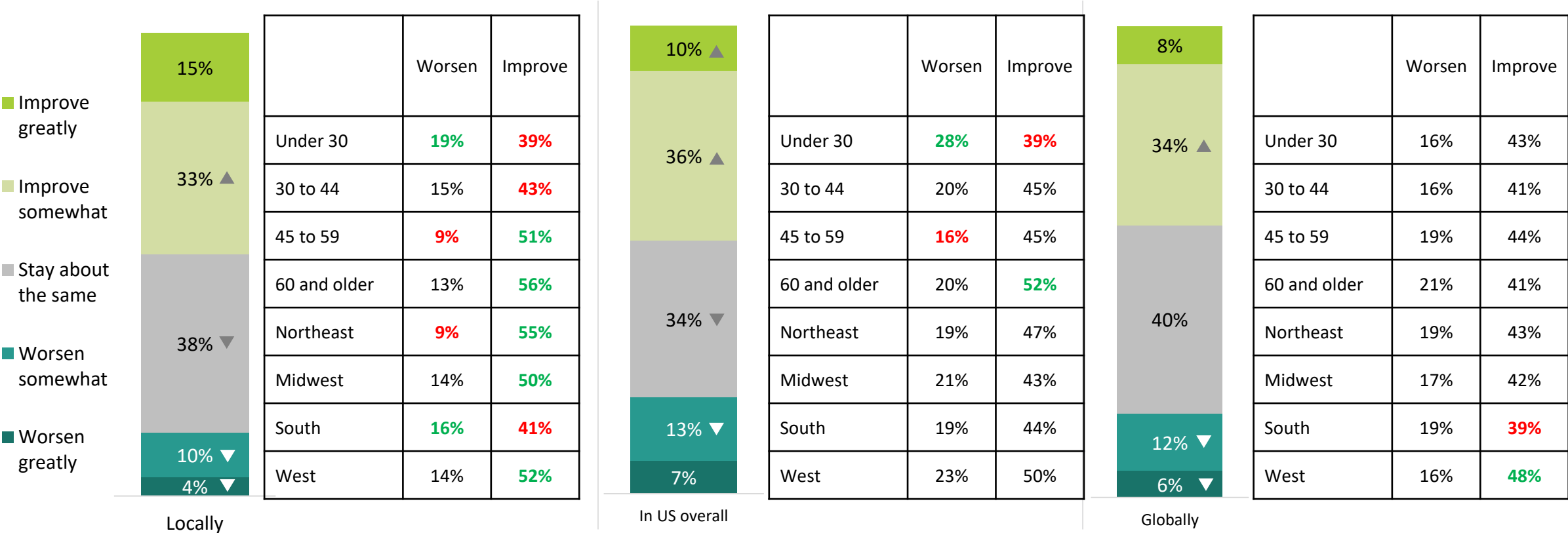
US Business Financial State Over Next 12 Months



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

Improvements are expected in the Covid-19 situation at the local, national, and global levels over the coming 30 days.

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

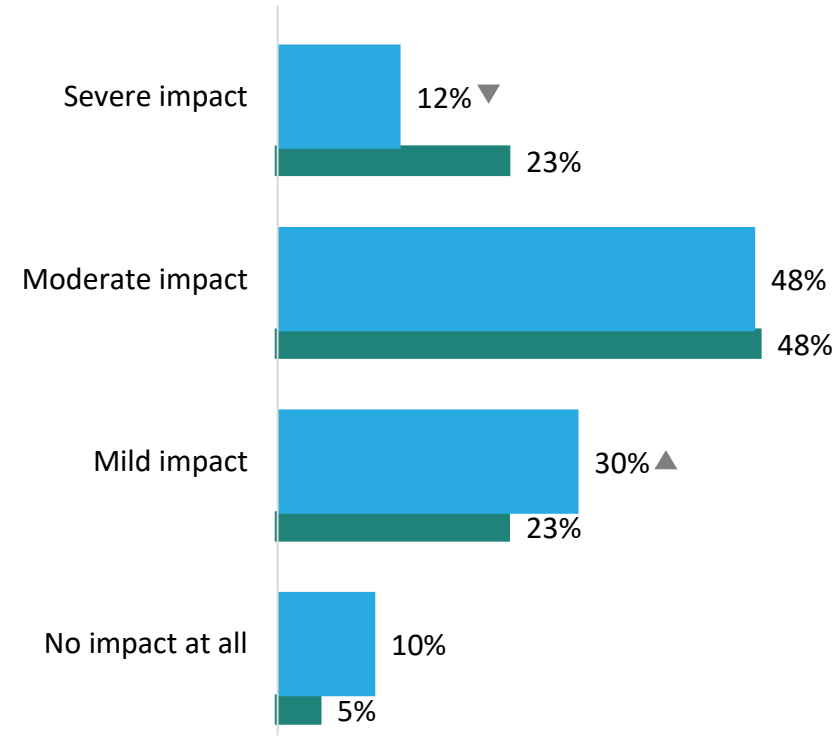


Q22 - Thinking locally, about the US overall, and globally, how do you expect the Coronavirus/Covid-19 situation to change in the next 30 days? Base: Total

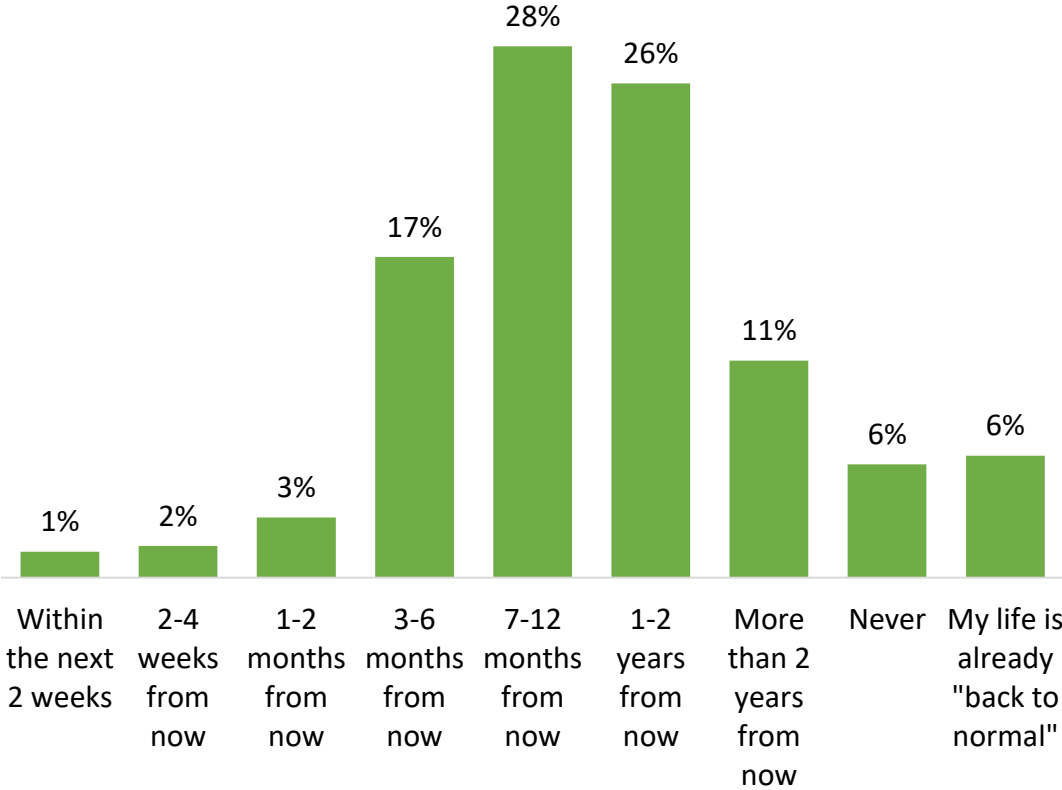
Fewer Americans are expecting severe impacts to their lives as a result of the pandemic over the coming 30 days. Americans do not expect things will be “back to normal” anytime soon, the majority stating in 7-24 months from now.

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

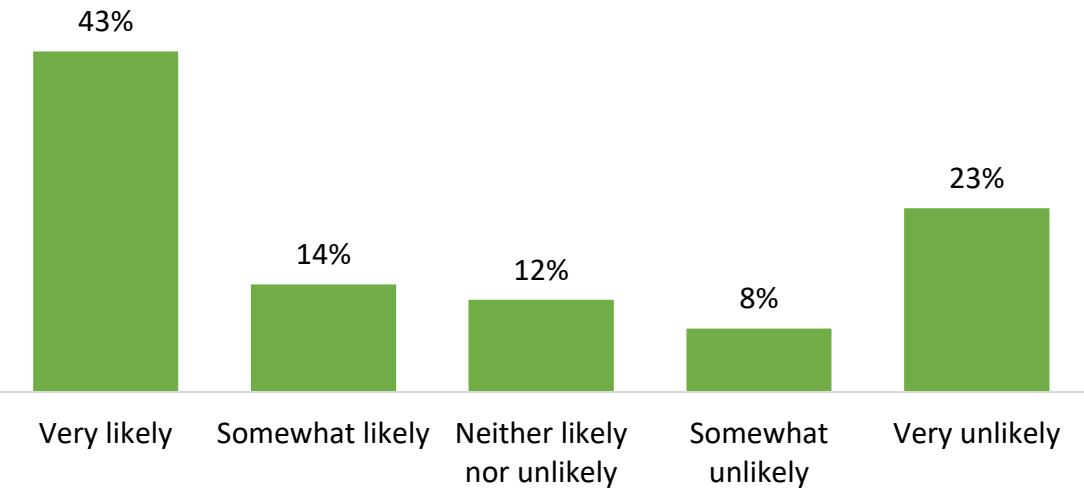
Pulse Topics

- Vaccine Interest
- Live entertainment events
- Exposure levels



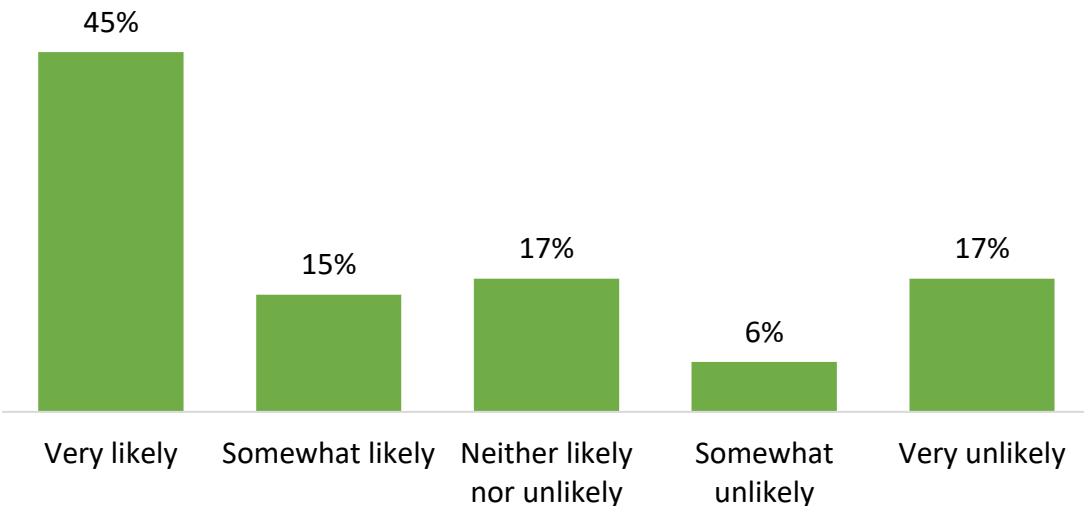
Among those not currently vaccinated, nearly six in 10 are likely to get a vaccine when one becomes available and to encourage others to do the same.

Intention of Getting Vaccine When Available (among those not currently vaccinated)



Under 30	42%	17%	15%	6%	21%
30 to 44	41%	13%	12%	8%	27%
45 to 59	52%	11%	11%	8%	19%
60 and older	37%	16%	9%	10%	27%

Intention of Encouraging Others to Get Vaccine When Available

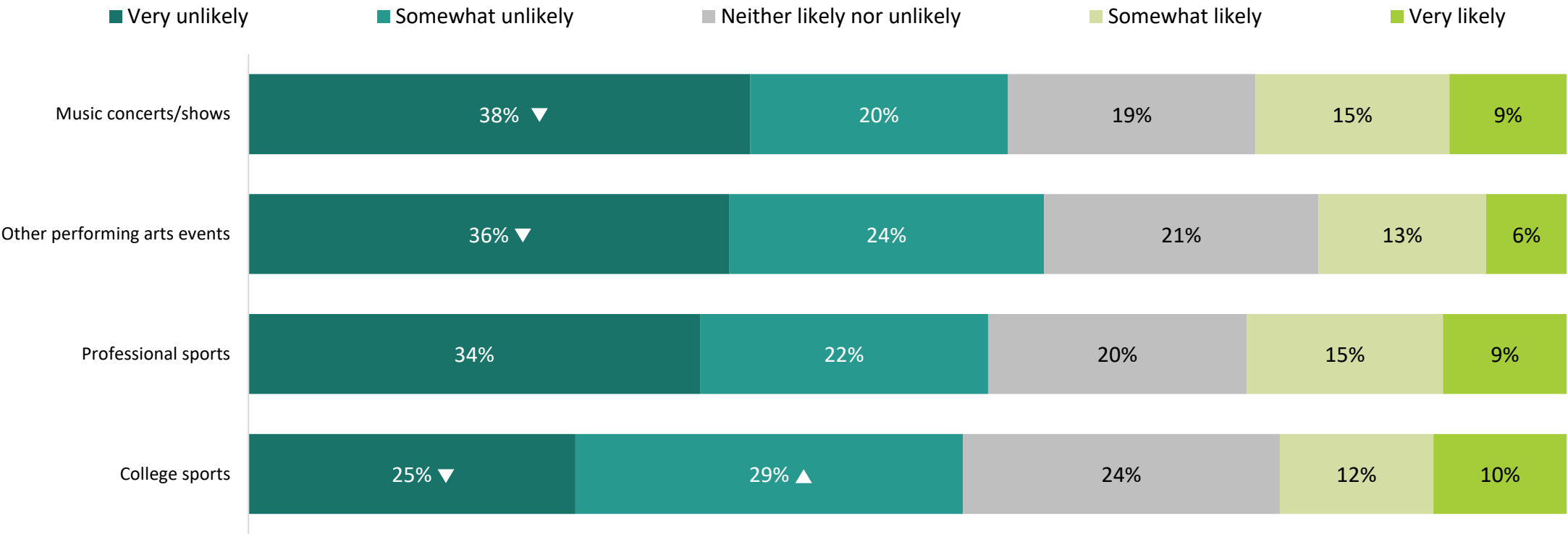


Under 30	38%	20%	18%	8%	16%
30 to 44	39%	16%	20%	3%	22%
45 to 59	50%	13%	16%	6%	15%
60 and older	53%	11%	14%	8%	14%

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?

Resistance to live entertainment falls at the most extreme levels this month, but Americas are still largely unlikely to attend a live event today.

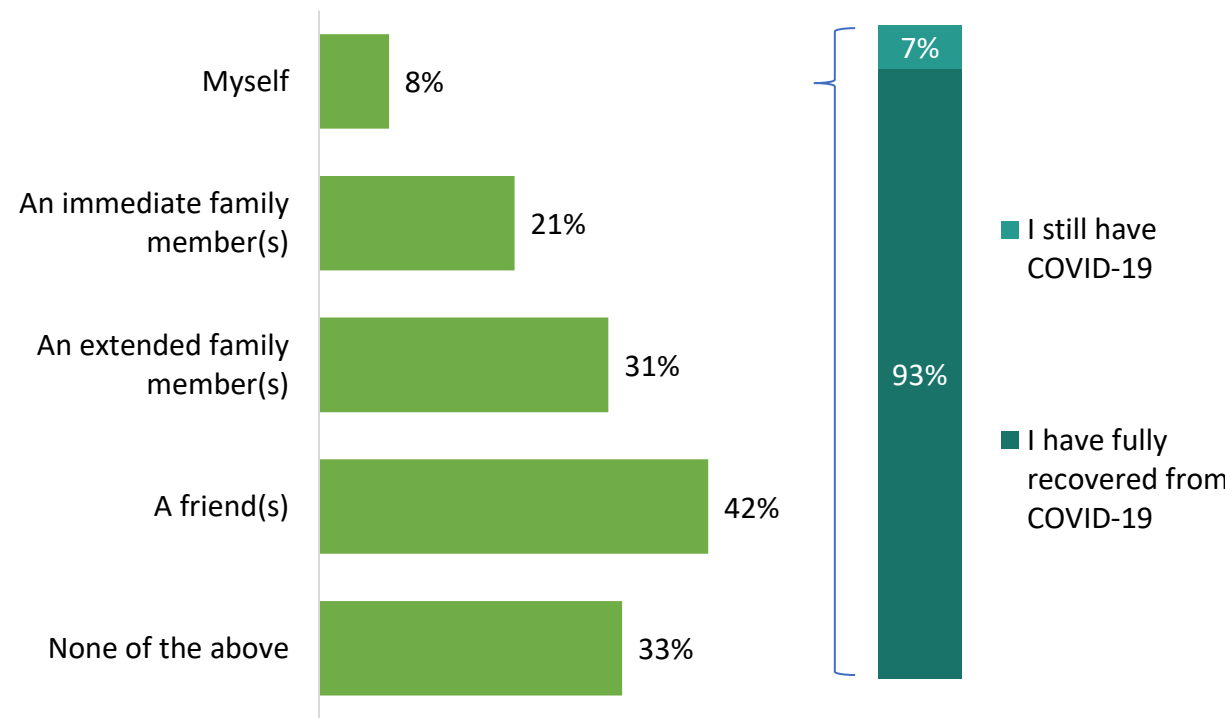
Likelihood to Attend Event Today (among those typically attending pre-Covid)



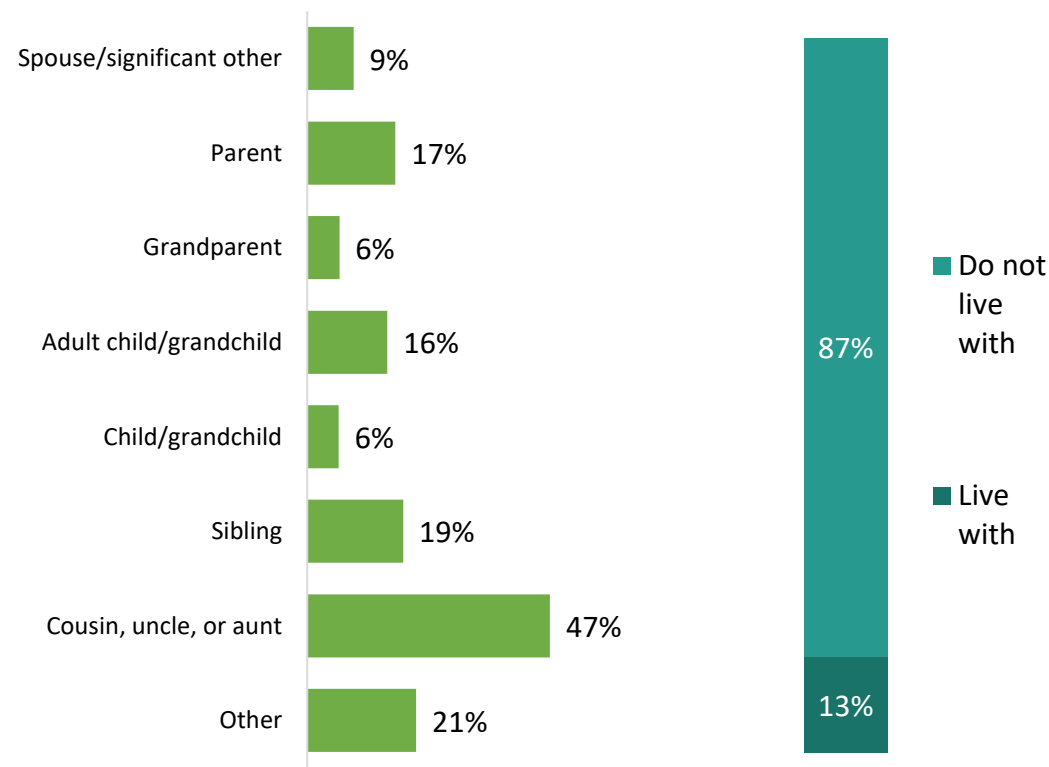
Q42 – And for each of the following types of live entertainment that you typically attend, how likely would you be to attend a live event today (assuming there was an event you were interested in)?

Around one in 10 surveyed Americans report that they, themselves, have contracted Covid-19, and over 90 percent of those have since recovered.

Exposure to Coronavirus/COVID-19



Relationship to those with Coronavirus/COVID-19



W22_Q19 - Which, if any, of the following statements apply regarding your own personal exposure or that of a friend/relative to the Coronavirus/COVID-19?/W22_Q20 You indicated that you, personally, have contracted COVID-19. Do you presently have COVID-19, or have you fully recovered?
W22_Q21 You indicated that a family member has/had contracted COVID-19. Which of the following family members have contracted the disease?/W22_Q22 Do you currently live with any of your family members that have/had contracted COVID-19?

Questions?



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