



Covid-19 Pandemic Impact on US Consumers

W23 | January 28th – 30th, 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-third wave of aytm's Covid-19 Consumer Tracker fielded Thursday, Thursday January 28th through Saturday, January 30th 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.

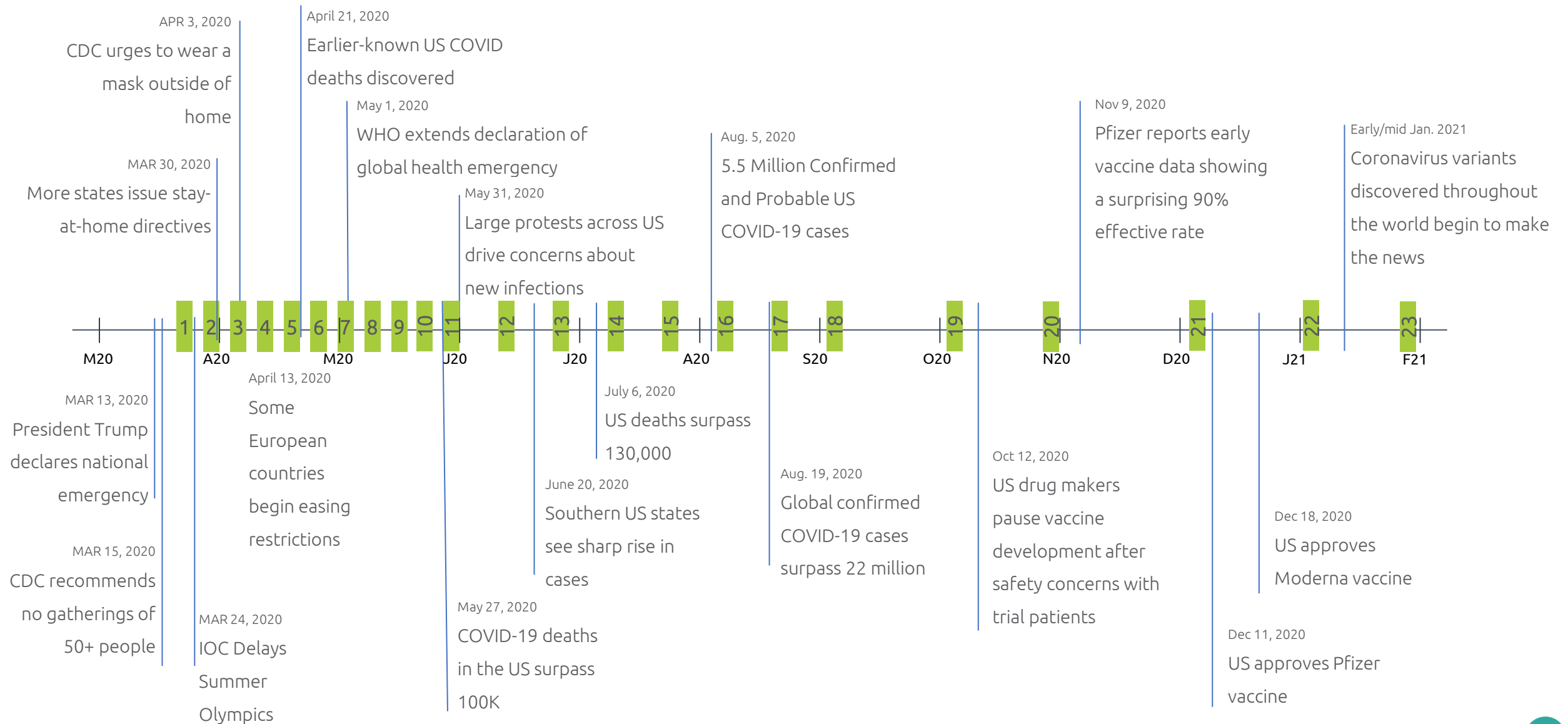
All significance testing is conducted at 95% confidence level with the total base used as the sample base for statistical calculations (Total Base = 1,000 for Total sample).

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 23 KEY FINDINGS

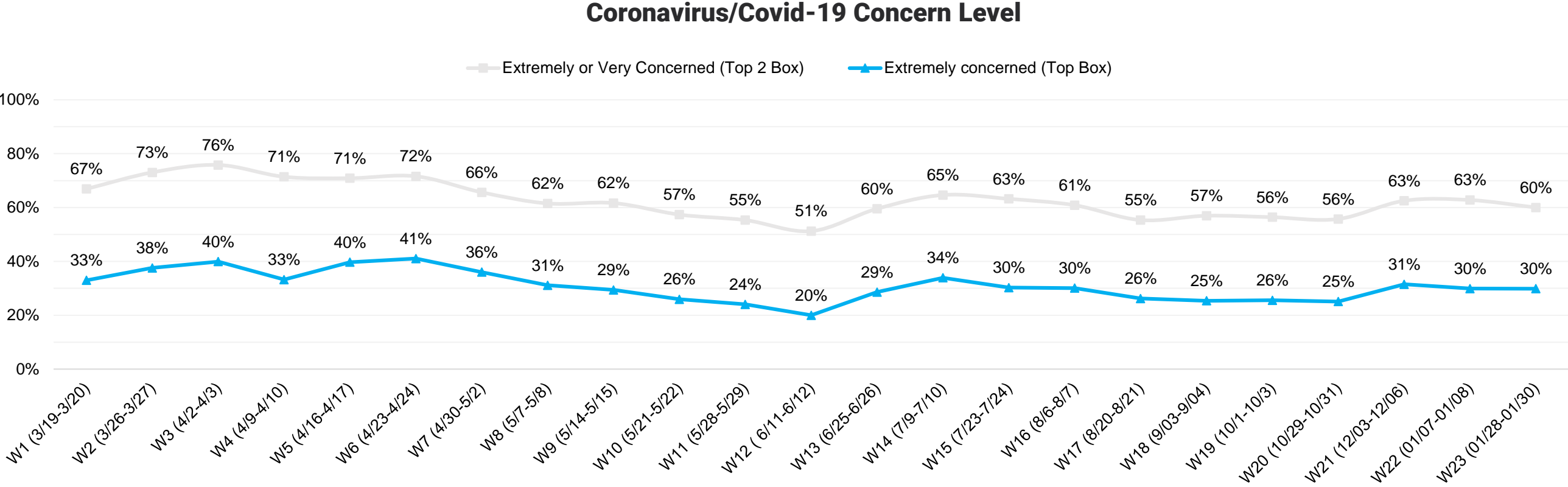
- Americans' anxiety related to Covid-19 remains stable (and elevated) through the close of 2020 and into the start of the new year, although optimism about the months ahead grows to it's highest point since early summer.
 - Around sixty percent of consumers are highly concerned with the virus – a level that is lower than those seen at the pandemic's beginning, but not significantly different from previous waves.
 - One-third of Americans expect the pandemic to improve in their local communities in the coming 30 days, while only about one in five expects the situation to worsen. These levels of optimism have not been recorded since June, although they're still far short of those seen last Spring.
 - Outright job loss remains a troubling result of the pandemic for around one in ten American consumers. Other reductions to income are consistently reported among about 75 percent. More concerning still, most of those who have encountered employment challenges at some point during the pandemic continue to face hardship.
- In the face of mounting impacts on daily life, and combined with hopeful vaccine news yet troubling variant-related developments, Americans continue to express a mixed opinion of what is to come.
 - The average expected time until Americans expect their lives to return to normal continues to climb and reaches its highest point yet – nearly 14 months. Yet, a hope for better financial times in the long-run remains. And more Americans - 60% - intend to get a vaccine when possible (among those who haven't done so already).
- Newly added to the tracker in recent waves, participants are now asked about their own personal experience with the disease. Nearly one in ten have had the disease themselves, and 15 percent live with someone who has contracted it.

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



Despite several significant developments in case counts and vaccine outlook, consumer concern over the virus remains relatively on-line with levels seen before the holidays.



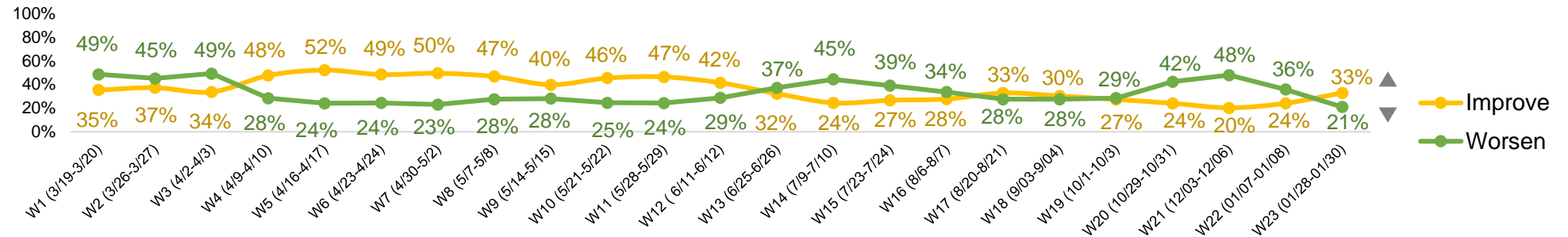
Q7 - Overall, how would you characterize your current level of concern about the Coronavirus/Covid-19 situation? Base: Total



Anticipated Change in Coronavirus/Covid-19 Situation

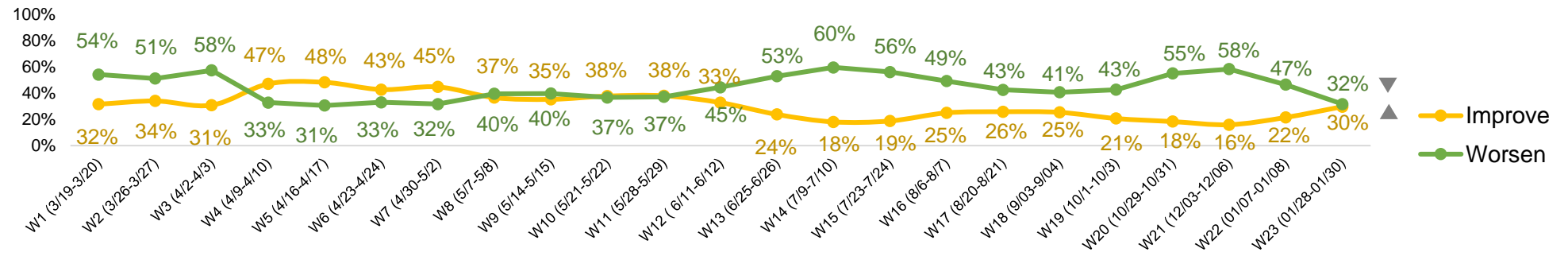
While concern levels are flat, more Americans are optimistic about how the pandemic will unfold in their local communities over the next 30 days.

Change Locally in Next 30 Days



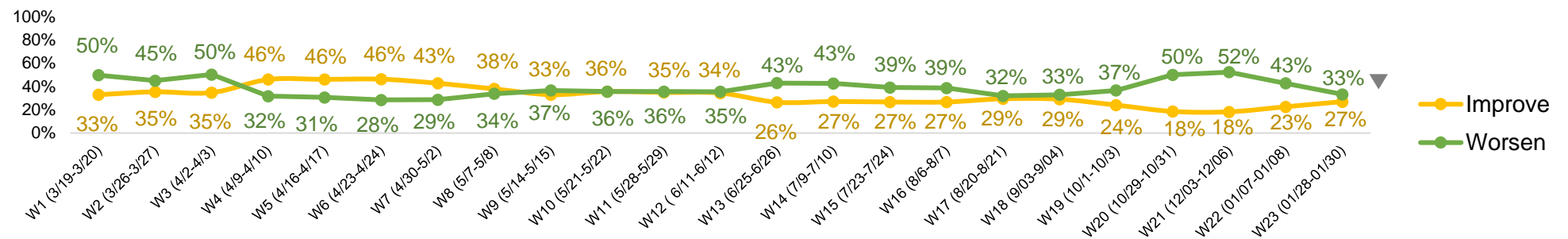
Similarly, the national 30-day outlook has been improving since December.

Change in US Overall in Next 30 Days



The same is true for the global 30-day outlook. Only about one-third expect the situation to worsen.

Change Globally in Next 30 Days

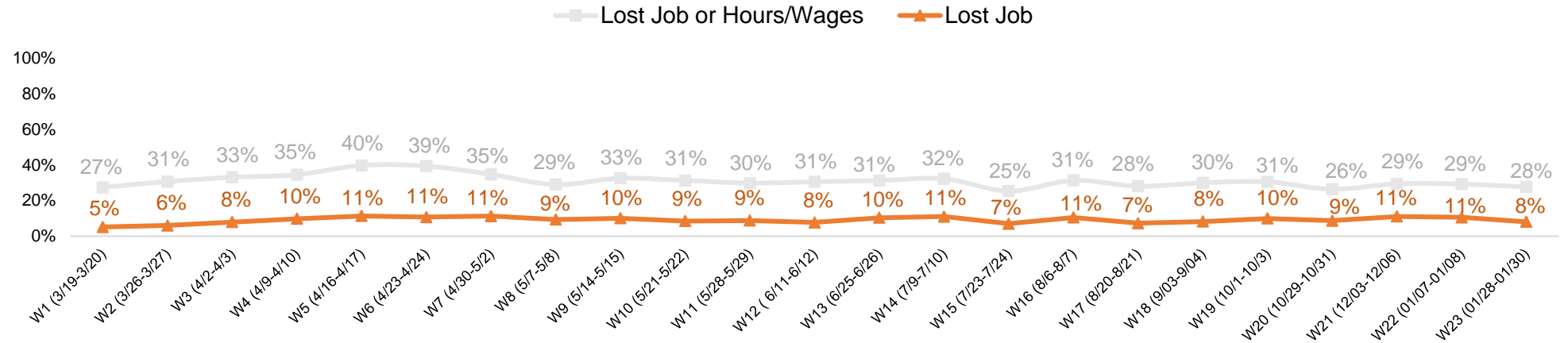


Q22 - Thinking locally, about the US overall, and globally, how do you expect the Coronavirus/Covid-19 situation to change in the next 30 days? Base: Total

Employment, Financial Impact of Coronavirus/Covid-19

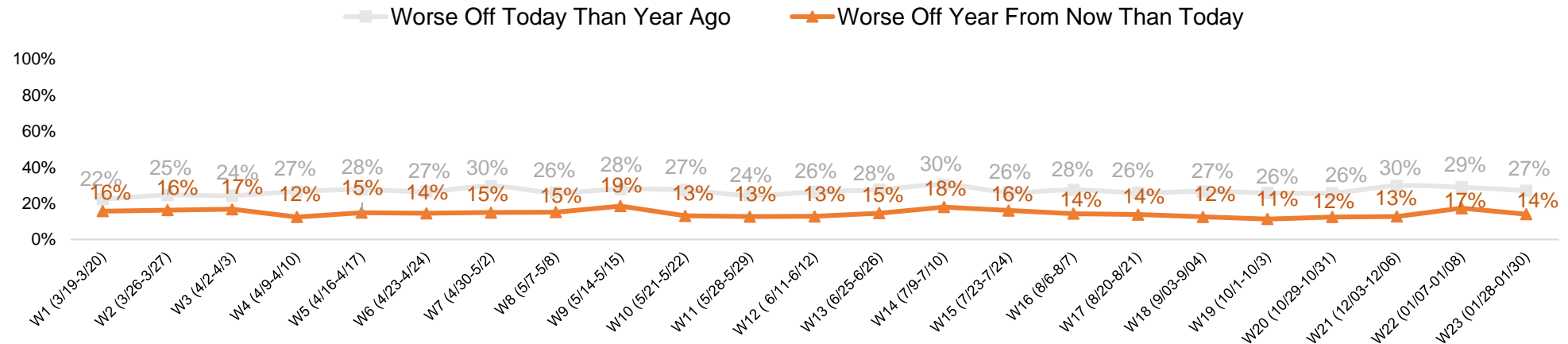
Employment impacts due to the COVID-19 pandemic remain even with previous waves: a little over one-quarter of Americans report some degree of employment disruption.

Coronavirus/Covid-19 Impact on Employment



Personal financial outlook remains incredibly resilient to shifts in COVID-related concern and developments.

Personal Financial State vs. One Year Ago, From Now



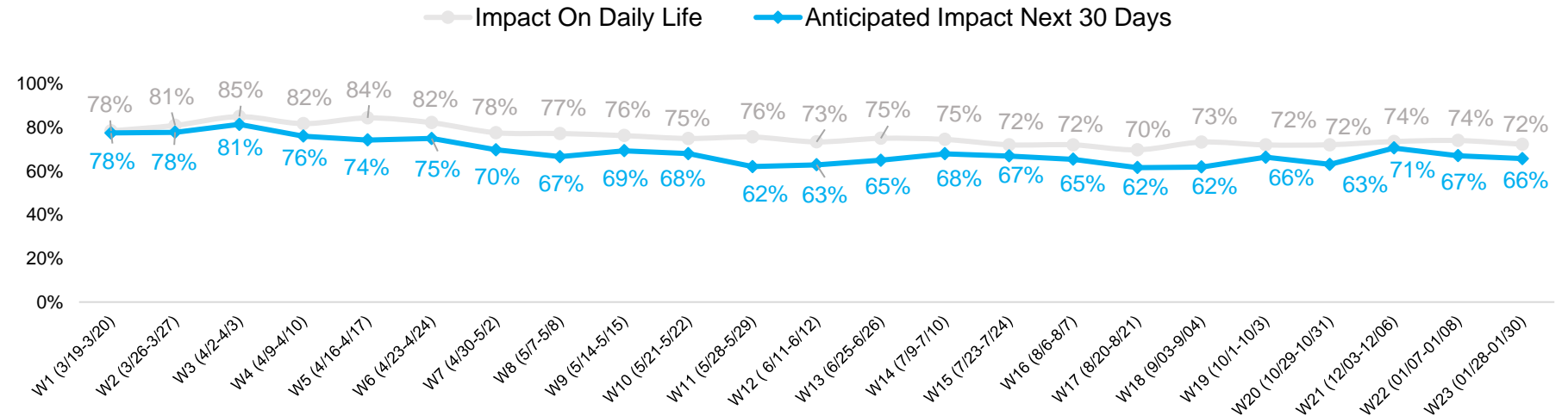
Q19 - At any point, did you lose a job or were your job hours or salary negatively affected by the Coronavirus/Covid-19 situation? Base: Total | Q2 - Would you say that you/your family are better or worse off financially than you were a year ago? / Q3 - Now looking to the future: Do you think one year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

Impact, Estimated Timeline of Coronavirus/Covid-19

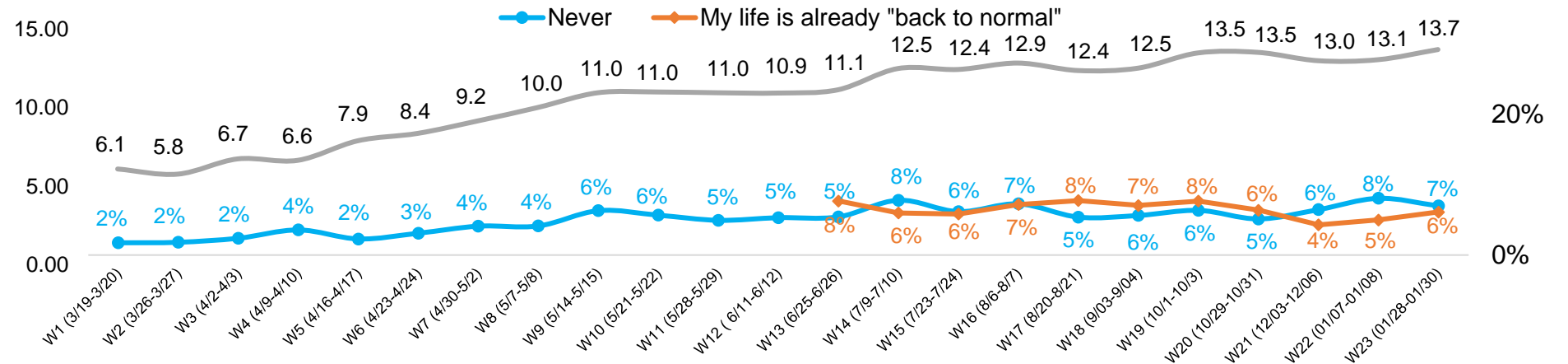
Nearly three-quarters of Americans report having felt a moderate or severe impact from the pandemic, while about two-thirds expect those impacts to continue throughout the next 30 days.

The time until Americans expect things to “return to normal” remains high at nearly 14 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

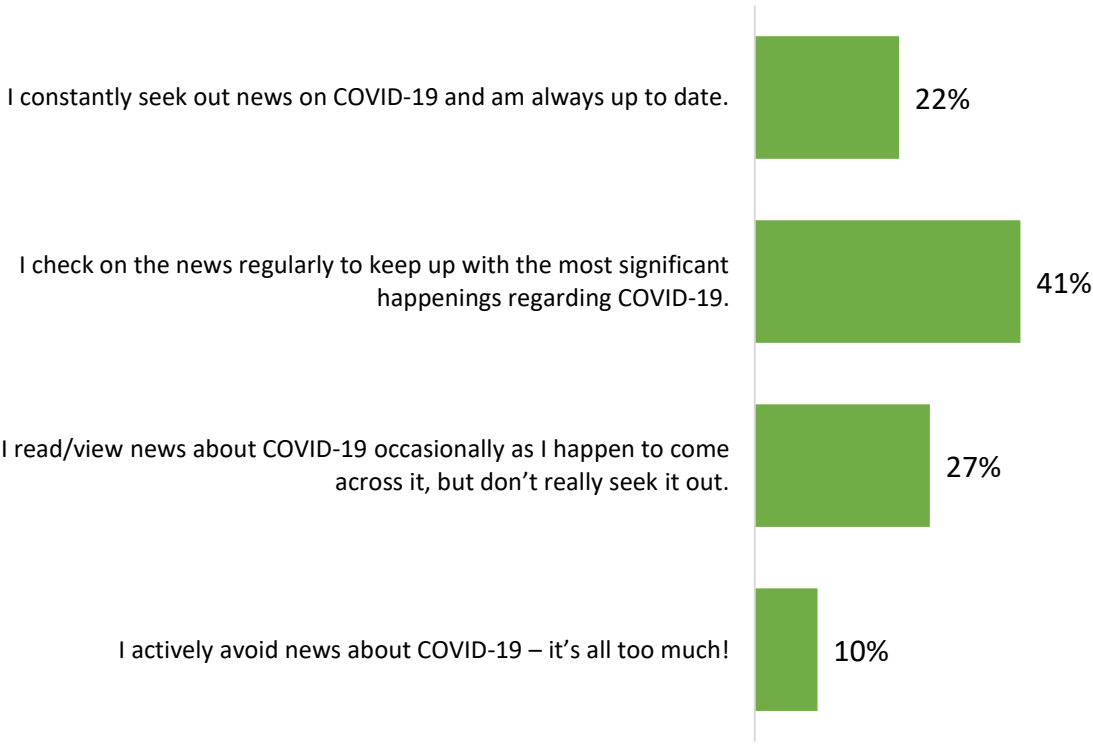
Awareness, Perceptions, Concerns

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

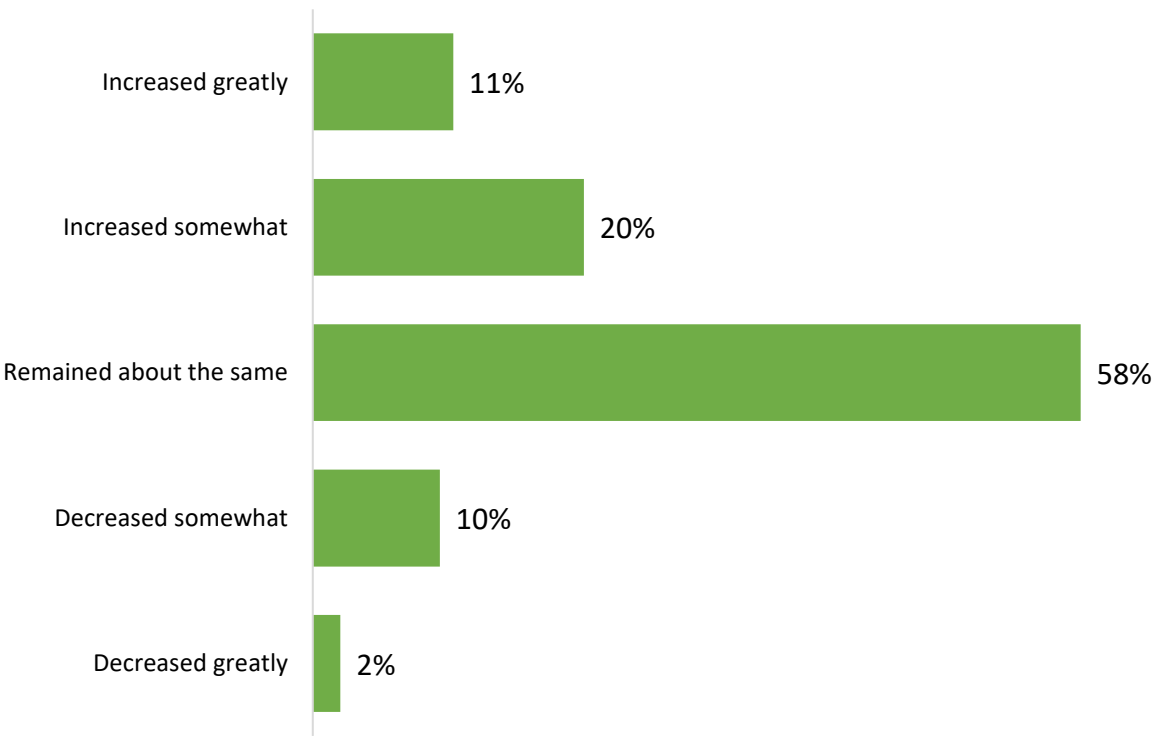


Covid-19 news consumption remains steady. Over 60 percent of Americans check for Covid-19 related news regularly or constantly seek it out.

Attitudes toward News about Covid-19

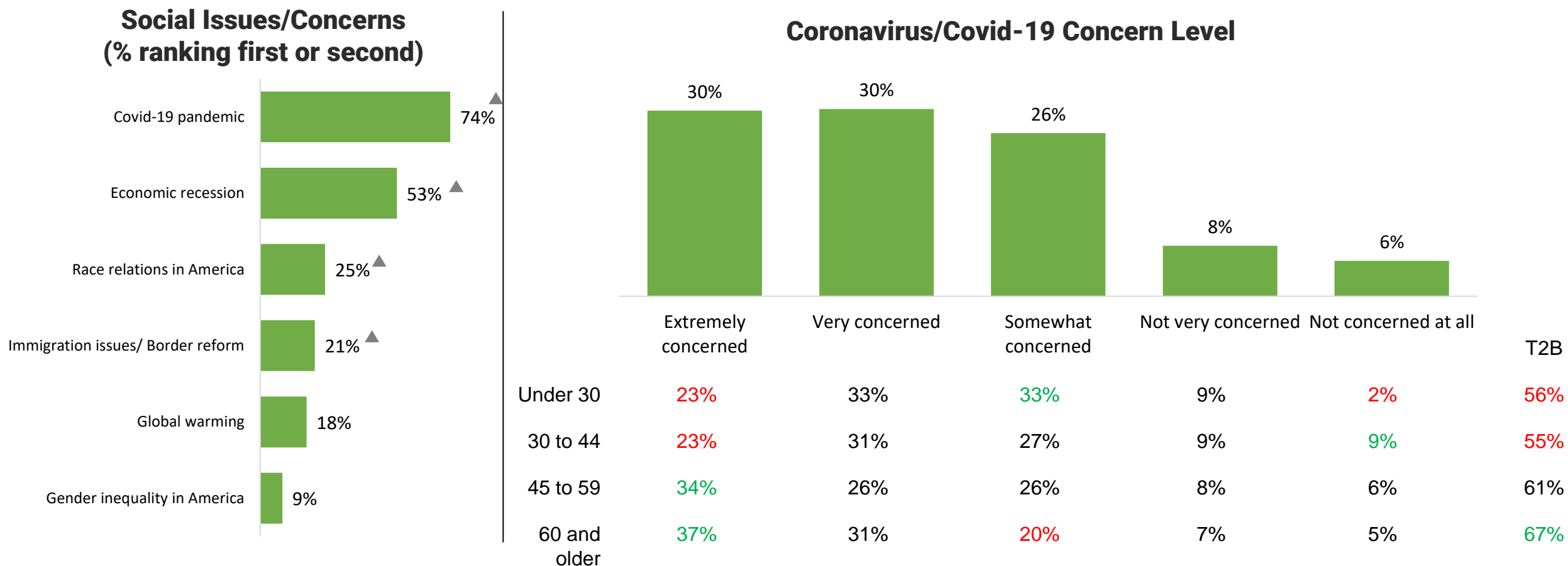


Change in Amount of News Consumed about Covid-19



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

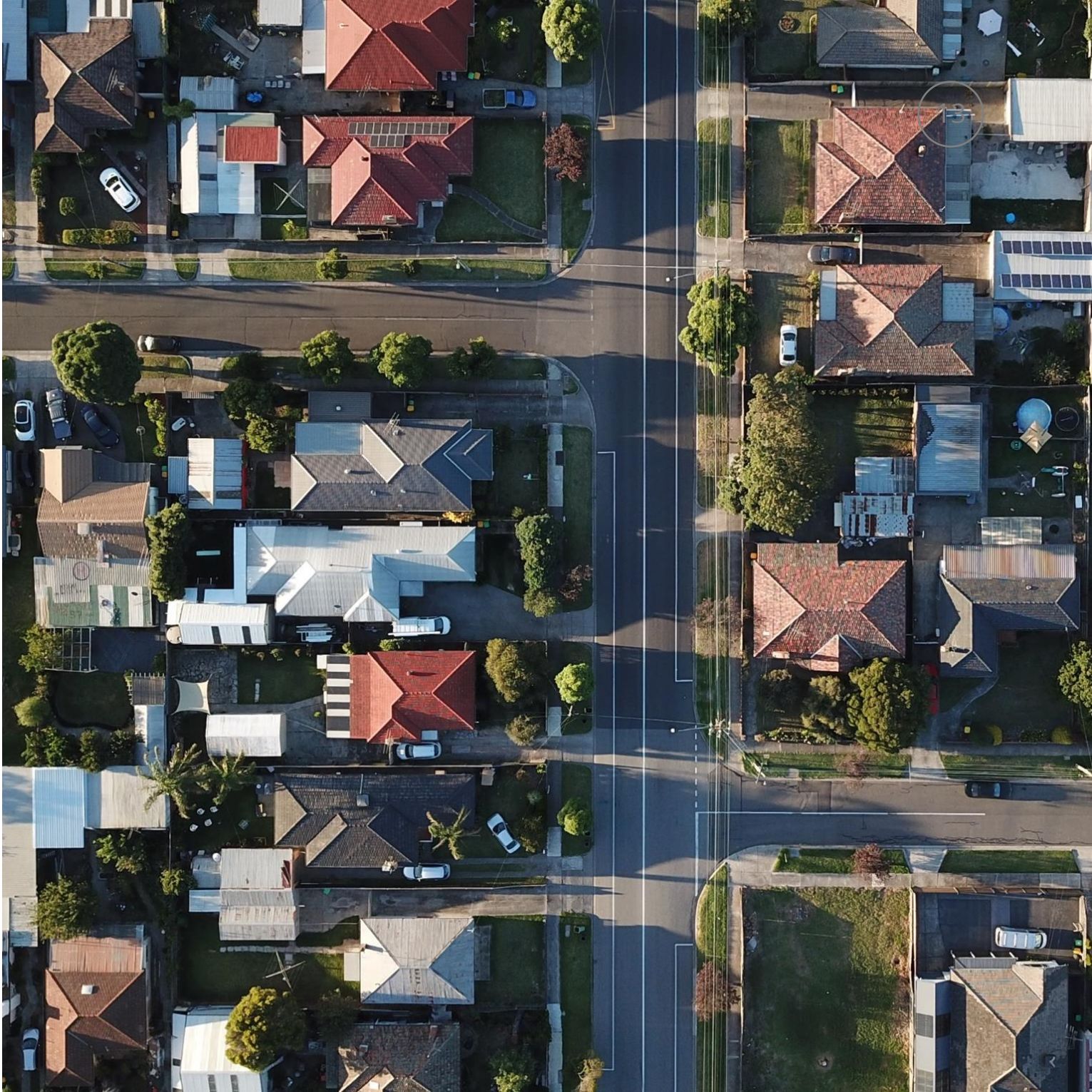
From among a ranked list of social issues, the Covid-19 pandemic remains the most concerning. With the presidential election and transition behind us, several other issues have increased in importance as well. Younger Americans continue to exhibit slightly lower levels of concern.



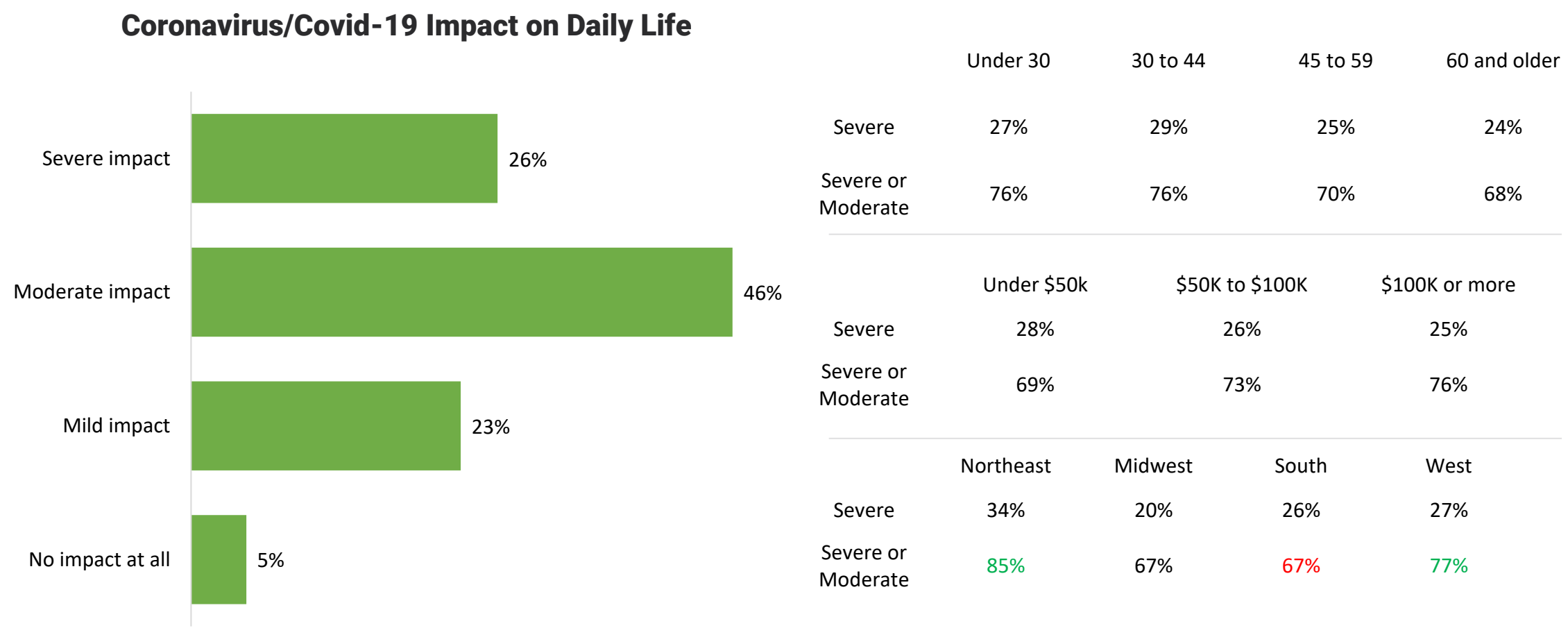
Q1b - Please rank the issues below from the one that you are most concerned about to the one you are least concerned about. Base: Total
 Q7 - Overall, how would you characterize your current level of concern about the Coronavirus/Covid-19 situation? Base: Total

Impact on Daily Life

- Overall Impact
- Behavioral Reactions



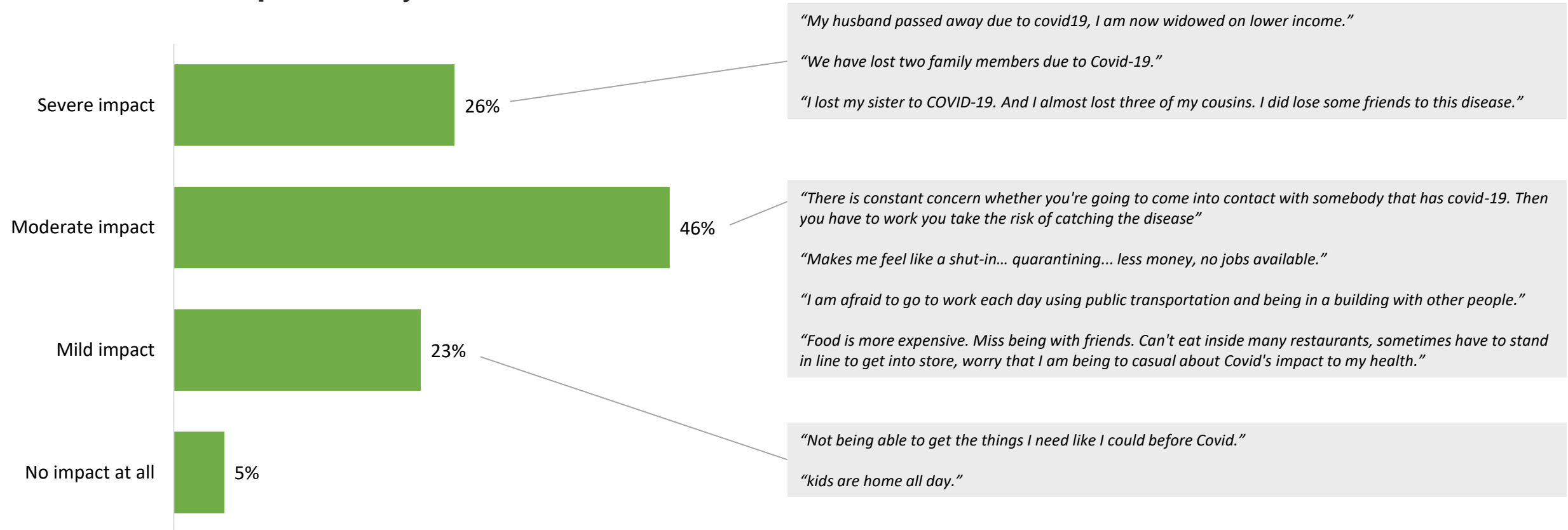
The number of Americans facing the pandemic’s worst impacts is generally steady this wave: just under three-quarters say they have faced severe or moderate impacts. Reports of disruption to daily life remain more common in the Northeast and Western regions.



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

Mentions of the loss of loved ones remain common among Americans who say the pandemic has had a severe impact on their daily lives. Concerns about financial security and long-term health are frequent as well.

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

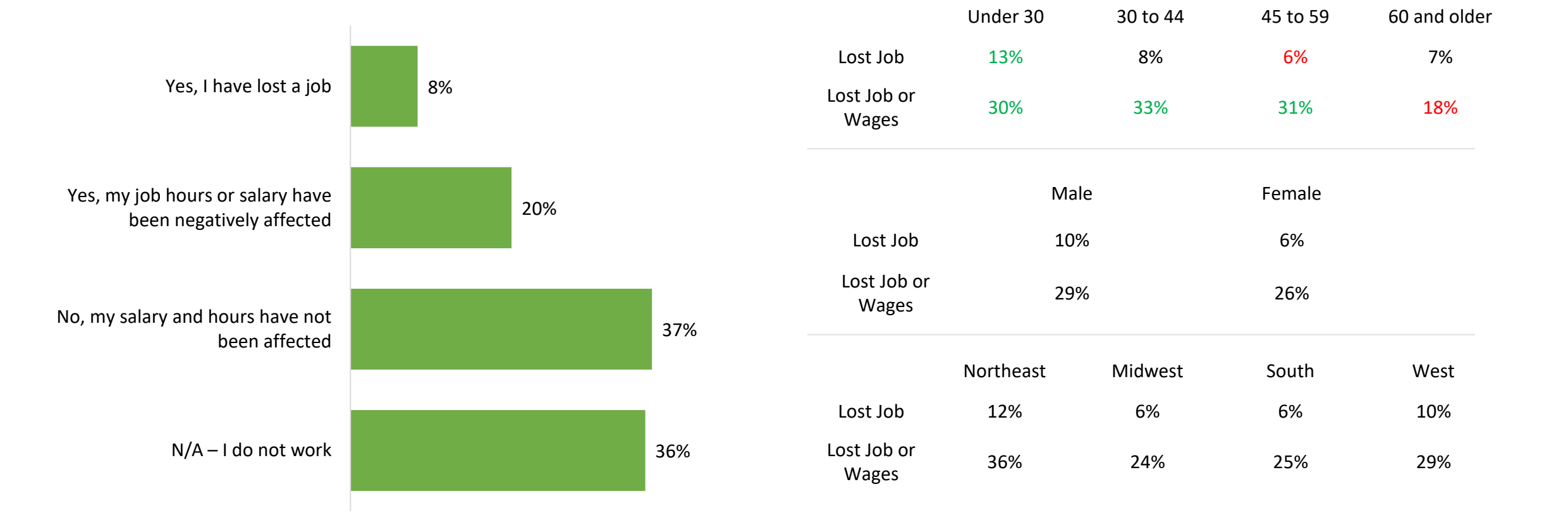
Employment Impact

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



Job losses related to Covid-19 continue to affect about one in ten Americans, with 20 percent reporting other negative impacts to their regular salary, wages, or hours. Again, younger Americans feel these impacts more acutely than those 60 years and older.

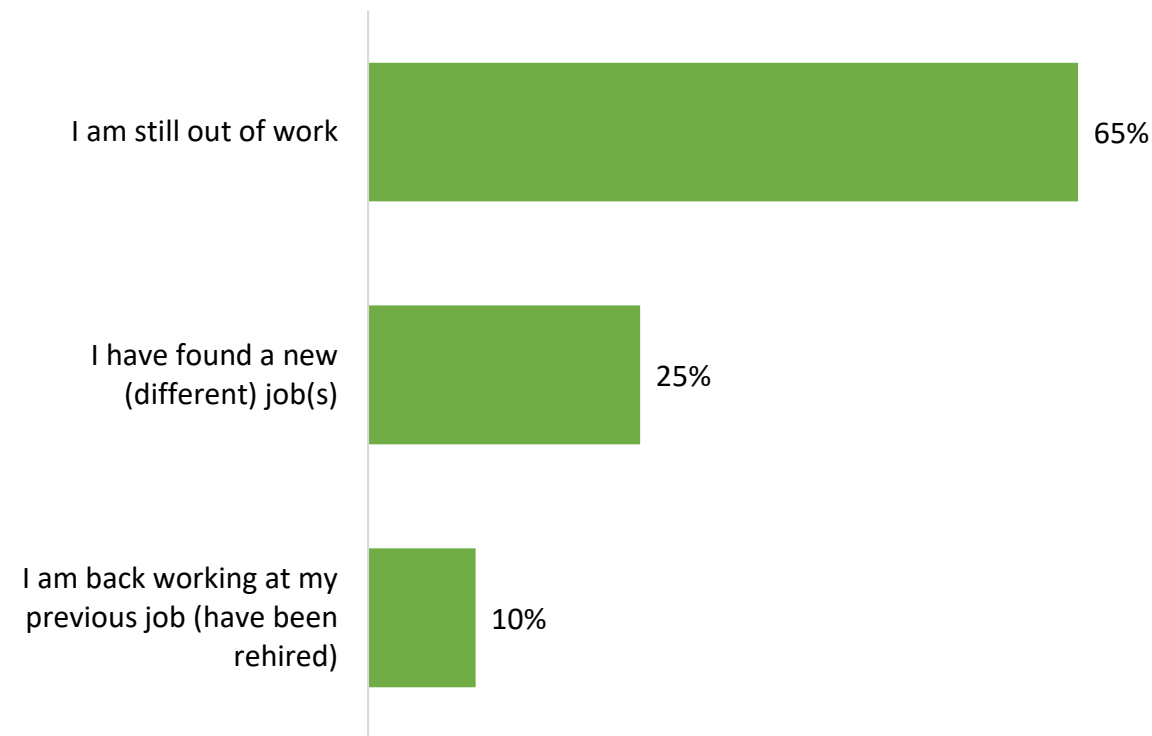
Coronavirus/Covid-19 Impact on Employment



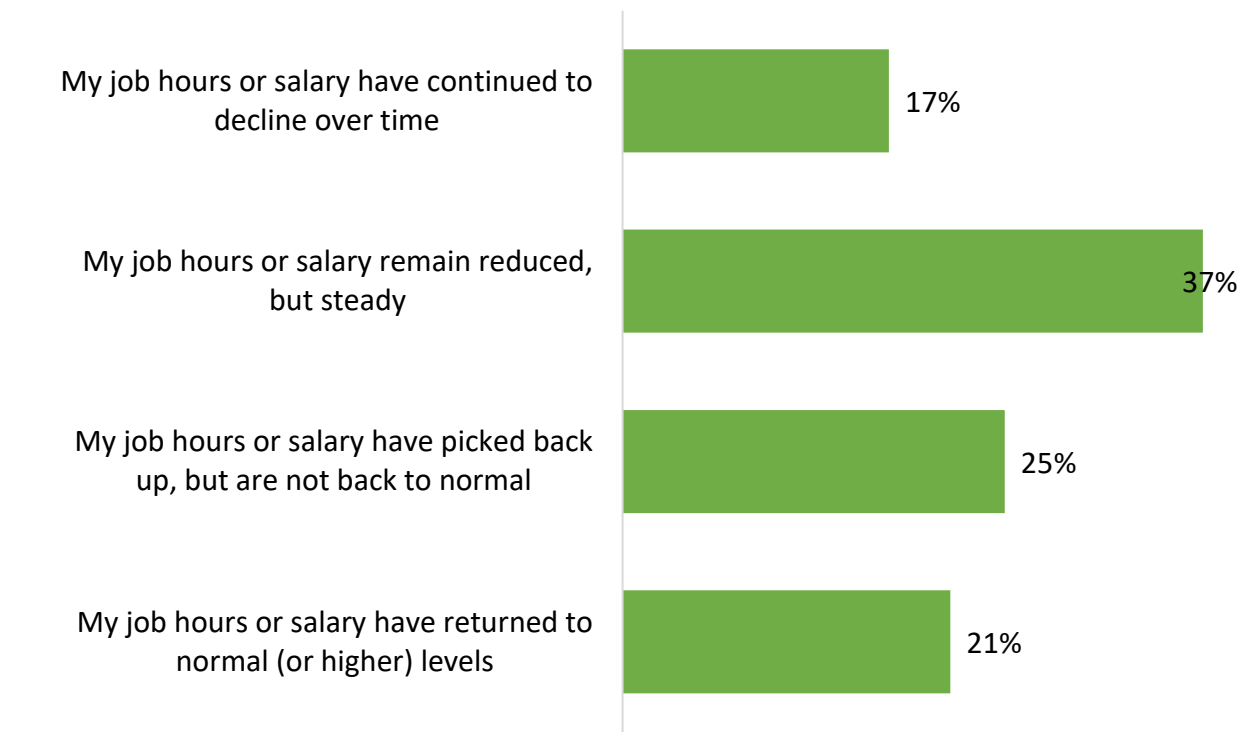
Q19 - At any point, did you lose a job or were your job hours or salary negatively affected by the Coronavirus/Covid-19 situation? Base: Total

Of those who indicated their employment has been negatively impacted by Covid-19, most remain out of work or with reduced pay.

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

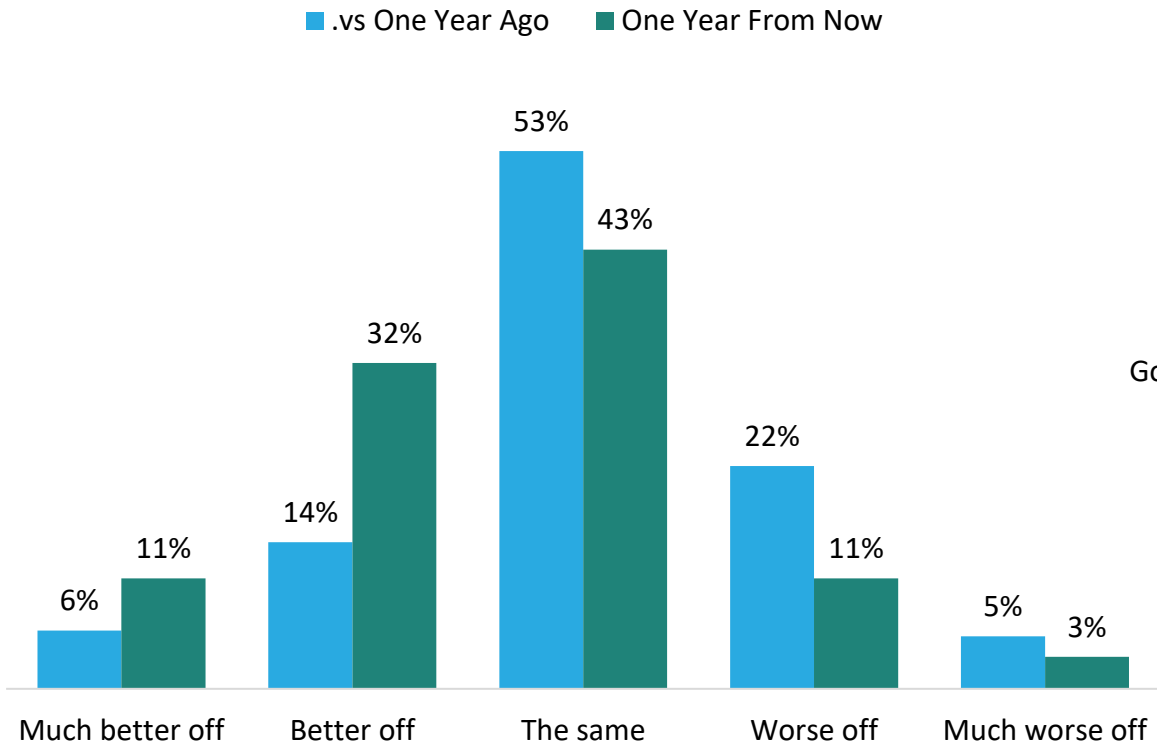
Outlook

- Consumer Confidence
- Projected Impact
- Anticipated Recovery Time

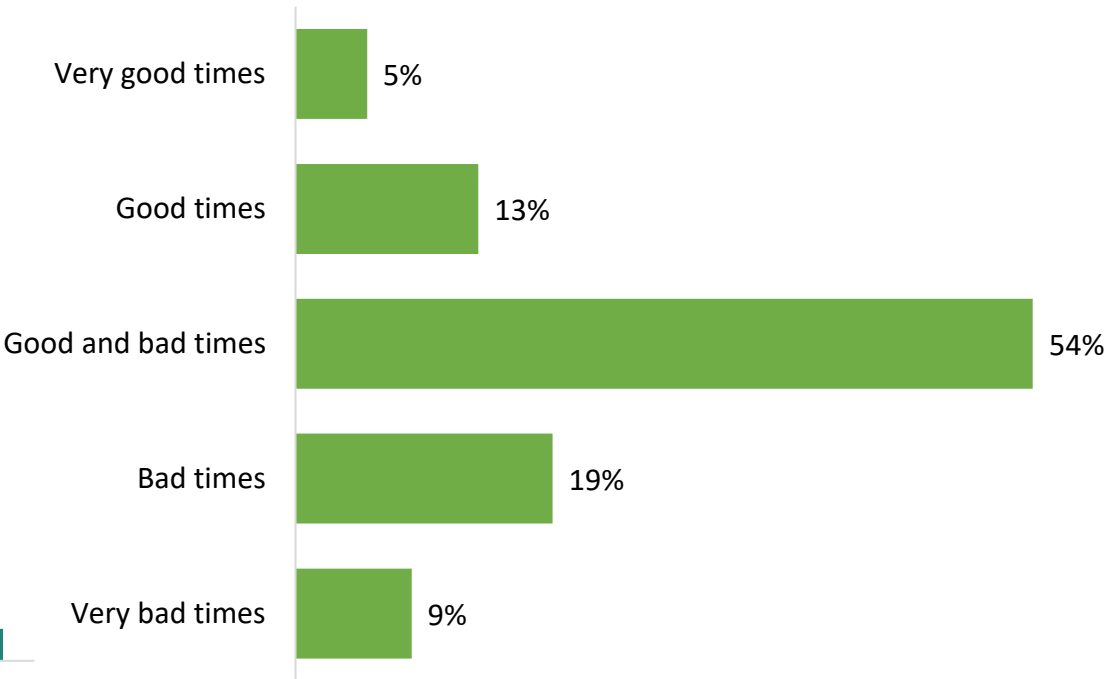


Americans continue to exhibit resilient optimism about their own personal financial state one year from now, although about one in four say they're in a worse financial position versus one year ago. The American consumer continues to expect a mix of good and bad economic times for the US business climate in general as the pandemic progresses.

Personal Financial State vs. One Year Ago, From Now



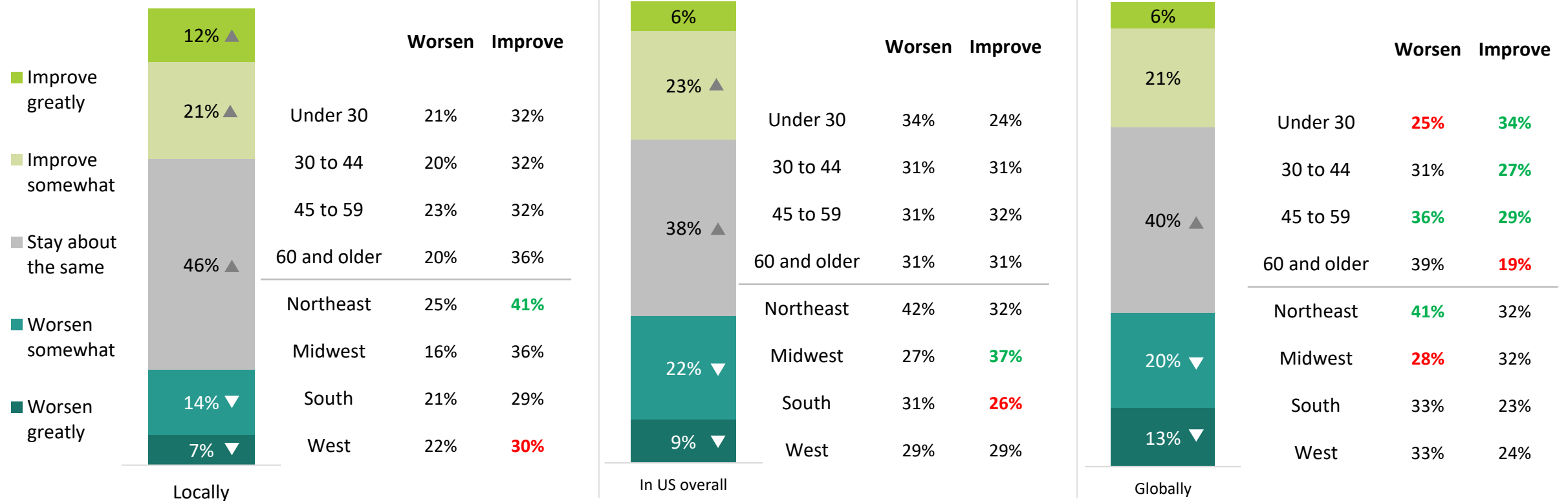
US Business Financial State Over Next 12 Months



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

Optimism has grown in late January on the heels of promising vaccine news and decreasing case counts. Americans remain more hopeful about how the pandemic will develop locally compared to the global outlook.

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

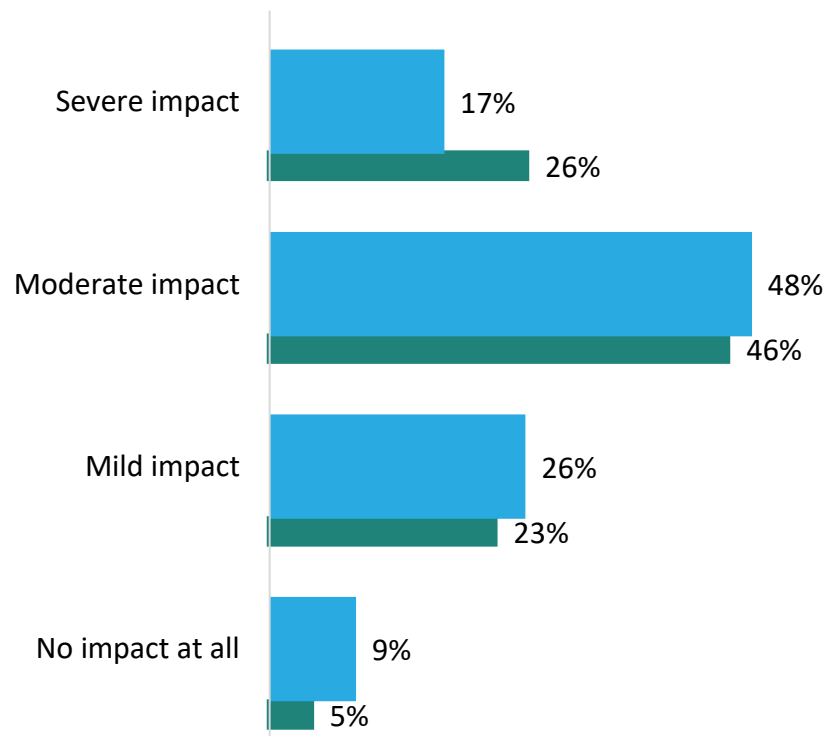


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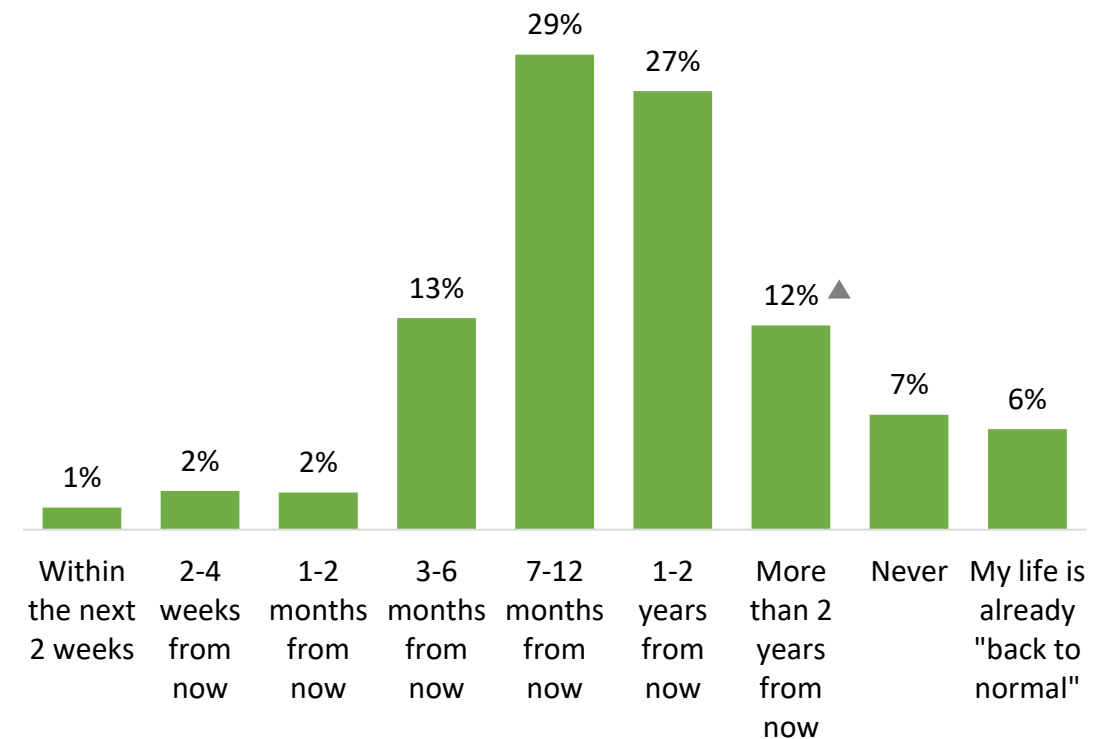
Despite flat concern levels and growing optimism, Americans are still resigned to the opinion that things will not be returning to normal any time soon. The average expected timeline until things begin to normalize is now close to 14 months.

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

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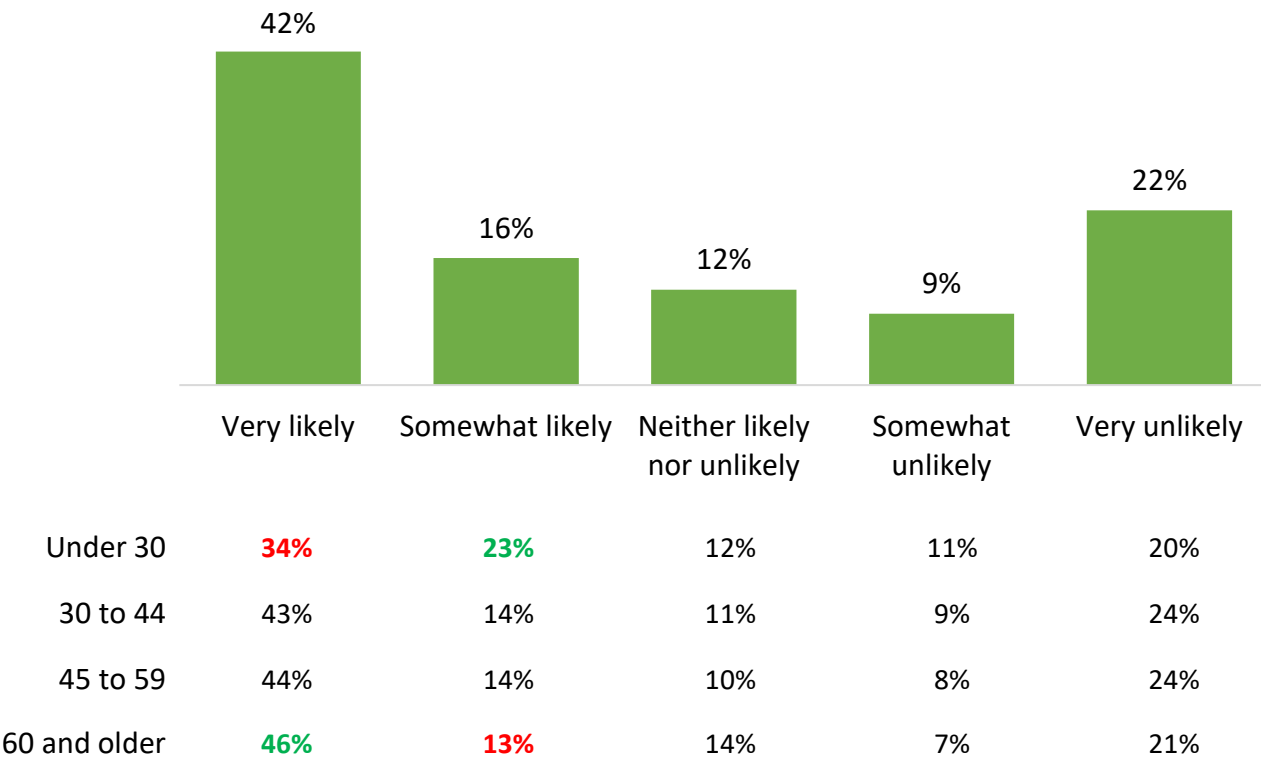
Pulse Topics

- Vaccine Interest
- Personal experience with COVID-19

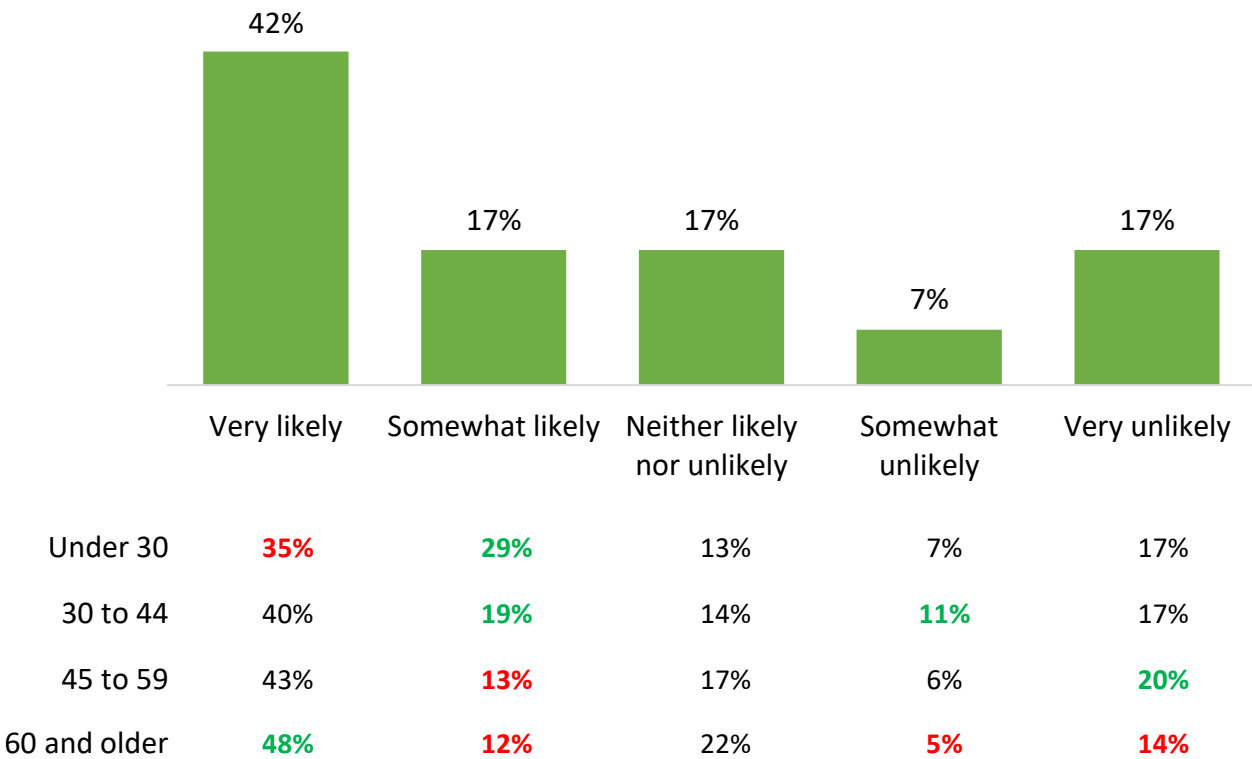


Vaccine intention has grown after the close of the 2020 holiday season. About six in ten Americans who haven't yet received the vaccine intend to in the future, and will encourage others to do the same.

Intention of Getting Vaccine When Available



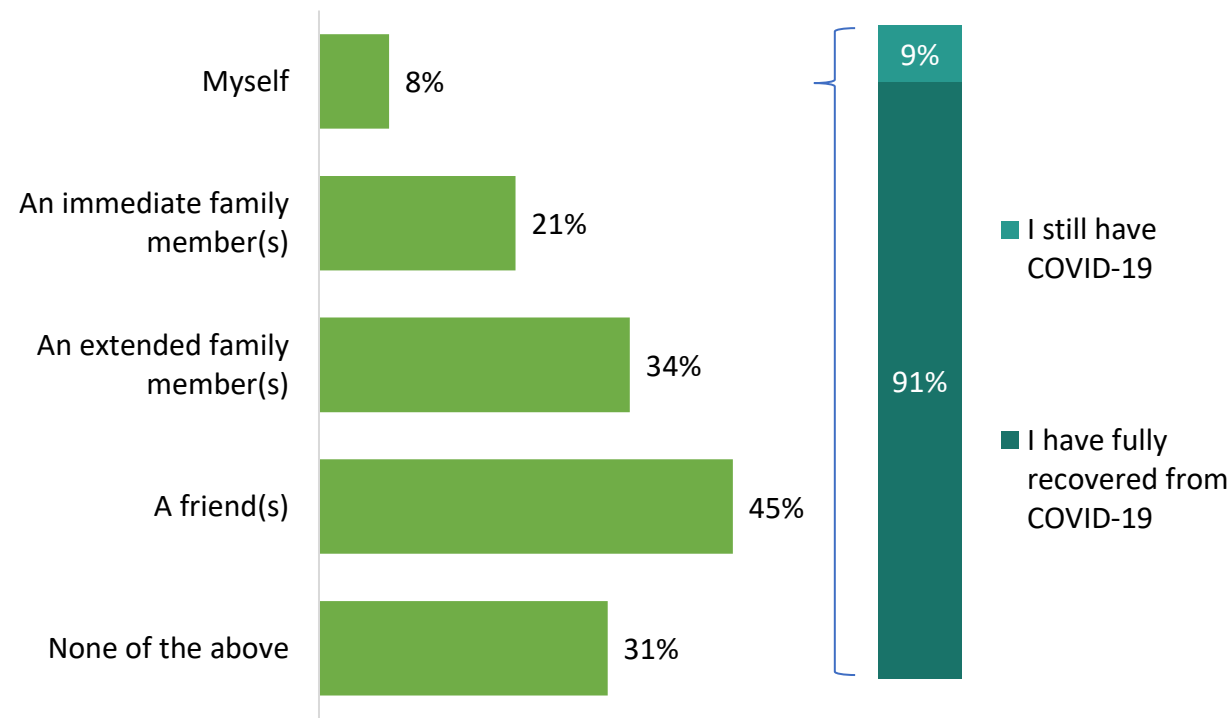
Intention of Encouraging Others to Get Vaccine When Available



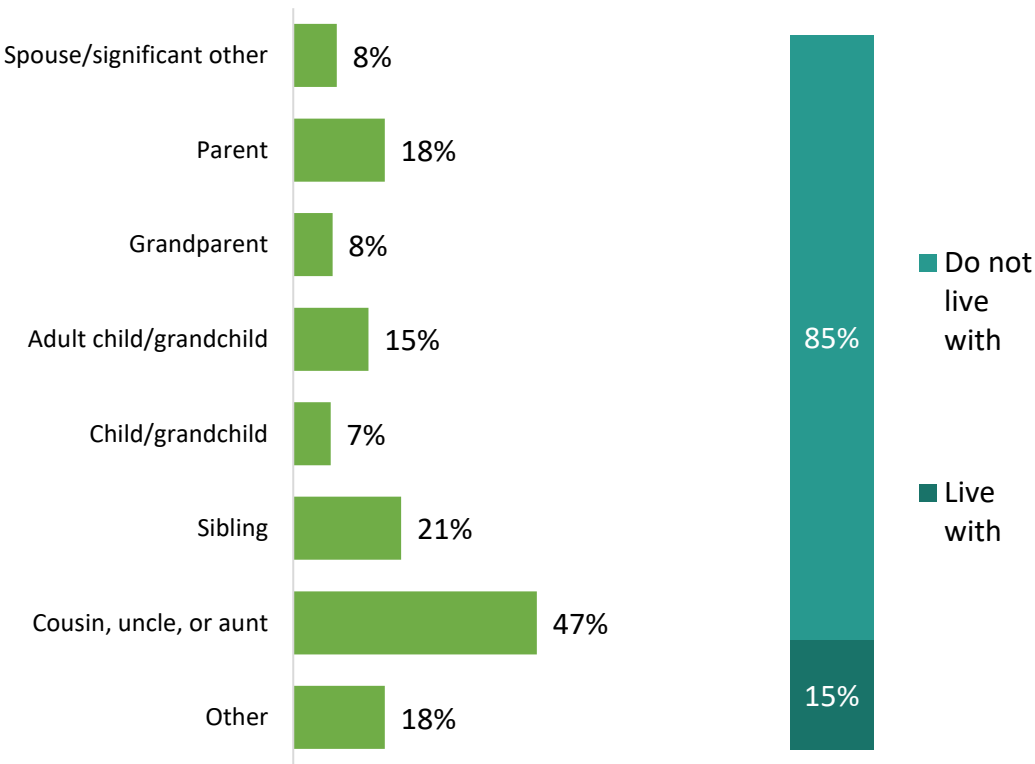
Q40 - If or when a proven vaccine against Coronavirus/Covid-19 becomes available, how likely or unlikely will you be to get the vaccine for yourself, and to encourage close friends and family to get the vaccine?

Nearly one in ten consumers surveyed report to have had the disease themselves, and between one-quarter and one-half know of someone close who has contracted it. One in seven *live* with someone who has contracted COVID-19.

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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