



# US COVID-19 Consumer Sentiment & Behavior

Monthly Study: March 2021 – April 2022



# About the Survey

## CONSUMER SENTIMENT & BEHAVIOR 2021 - 2022

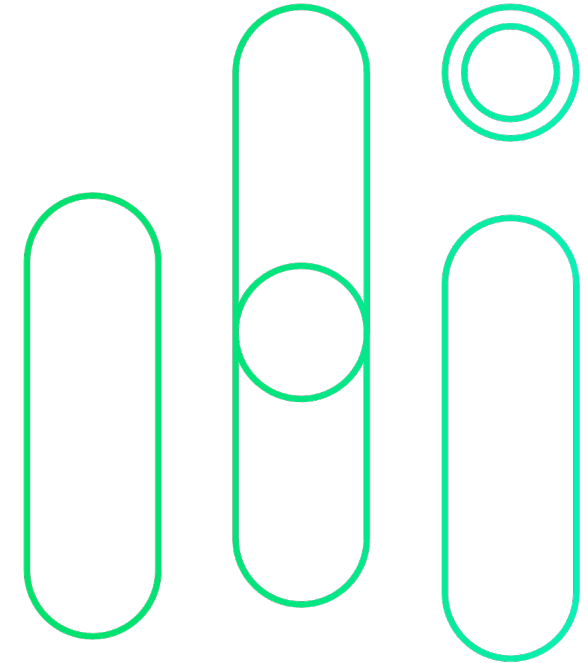
Numerator's consumer sentiment survey is fielded to 1,000+ consumers on a monthly basis. Responses are shown at a total level & broken out by COVID-19 vaccine status, based on Numerator's Premium Vaccine People Groups.

**Waves 1-3 (March - May)** of this monthly survey were broken out based on vaccine status & intention information gathered from consumers February 2021.

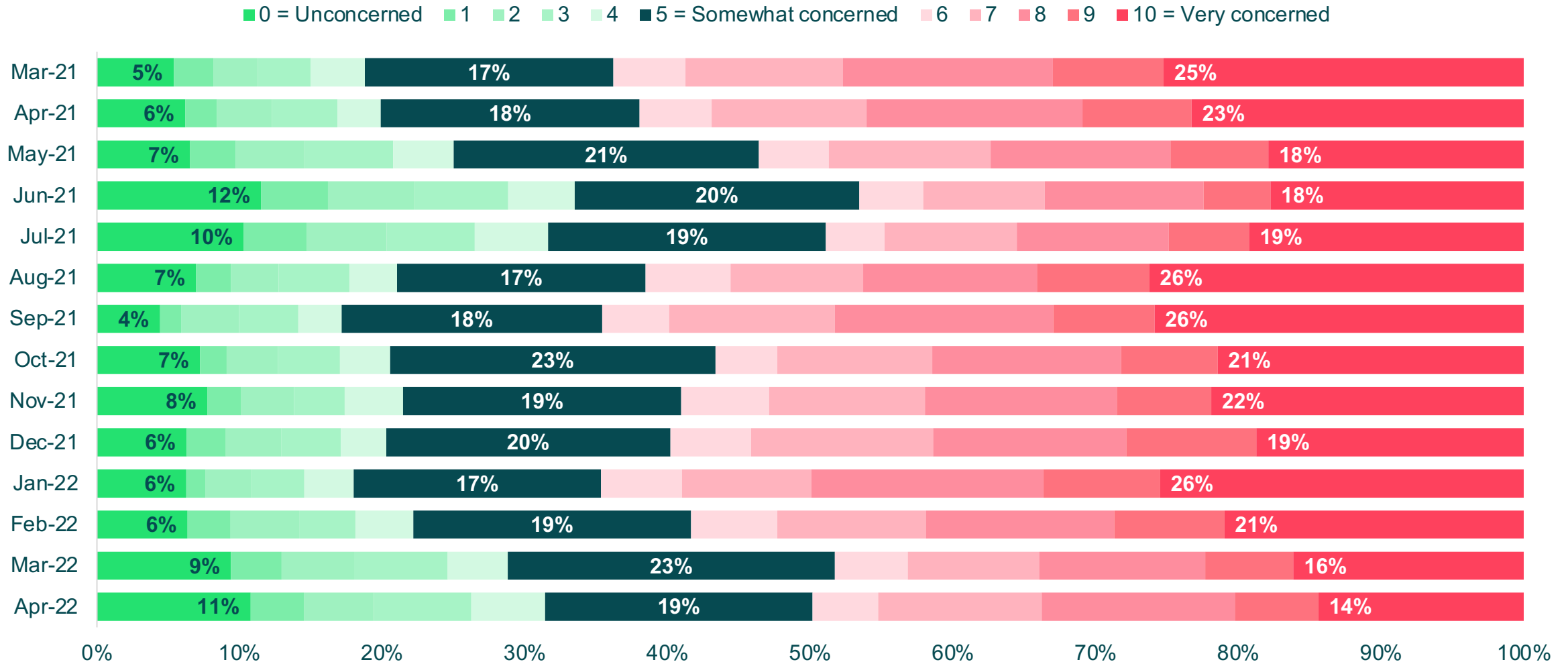
**Waves 4+ (June+)** are broken out based on updated vaccine status & intention information gathered from consumers May 2021. Breakouts include Vaccinated & Won't Get Vaccine. Consumers who are unsure or still awaiting their vaccine are included in the survey sample and total rollup, but are not specifically broken out.

### Timing & Sample Size of Waves:

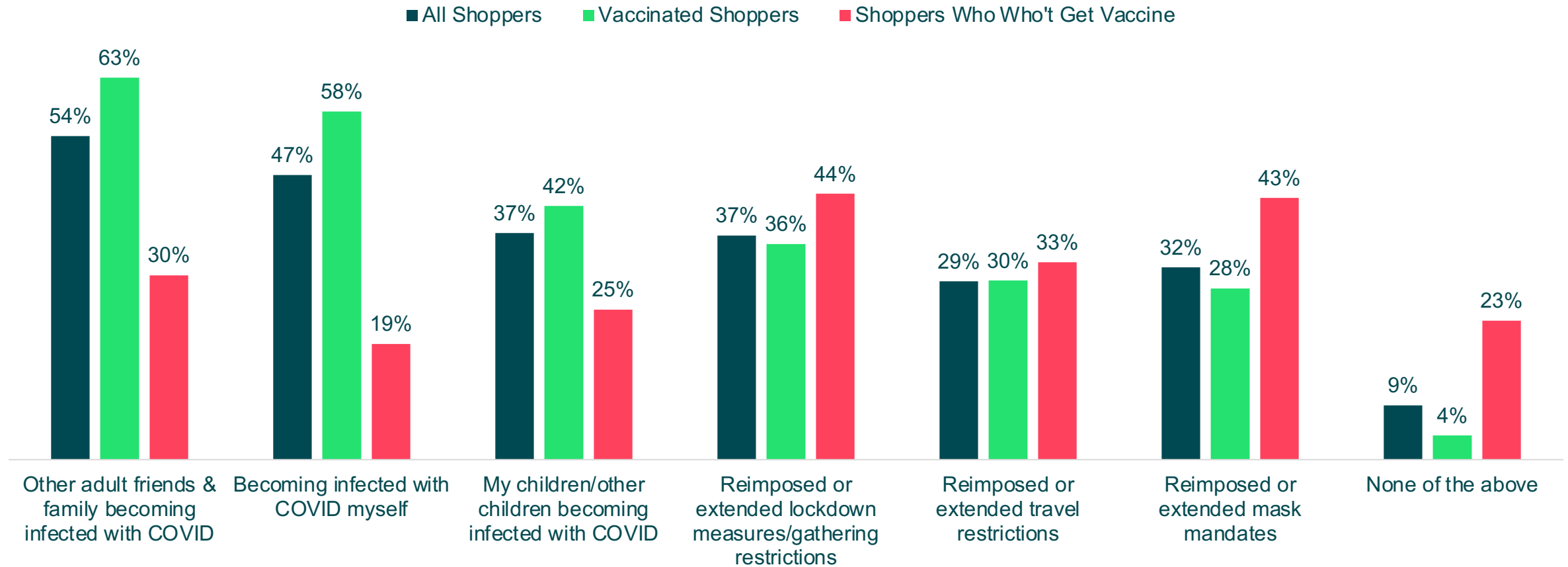
- Wave 1: 3/15/21, n= 2,083
- Wave 2: 4/18/21, n= 2,262
- Wave 3: 5/17/21, n= 2,316
- Wave 4: 6/12/21, n= 1,069 (\*updated sample information)
- Wave 5: 7/15/21, n= 1,071
- Wave 6: 8/13/21, n= 1,108 (\*added & tweaked select questions)
- Wave 7: 9/17/21, n=1,085
- Wave 8: 10/18/21, n=1,080
- Wave 9: 11/17/21, n=1,072
- Wave 10: 12/12/21, n=1,130 (\*tweaked select questions)
- Wave 11: 1/9/22, n=1,039
- Wave 12: 2/10/22, n=1,038
- Wave 13: 3/9/22, n=1,021
- Wave 14: 4/14/22, n=1,041



# COVID-19 concern continues to decline from its peak in January.

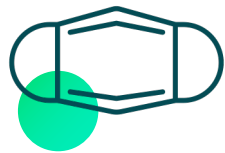
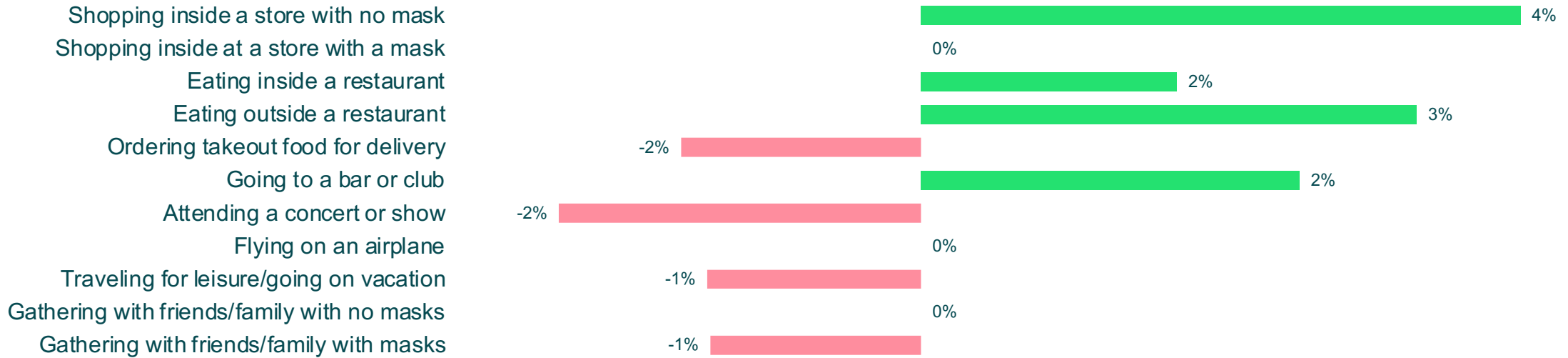


# Vaccinated shoppers are most worried about others getting infected with COVID-19, while those not getting the vaccine are most concerned about extended mask mandates or gathering restrictions.



# Comfort levels fluctuated for out of home activities in April. The biggest shifts were seen with shopping with no mask and eating at restaurants.

## Changes in comfort levels: April vs. March



43%

of consumers prefer to wear masks in public at this point in time

51% of Vaccinated / 18% of Won't Get Vax



36%

of consumers prefer to shop at retailers that require masks

44% of Vaccinated / 15% of Won't Get Vax

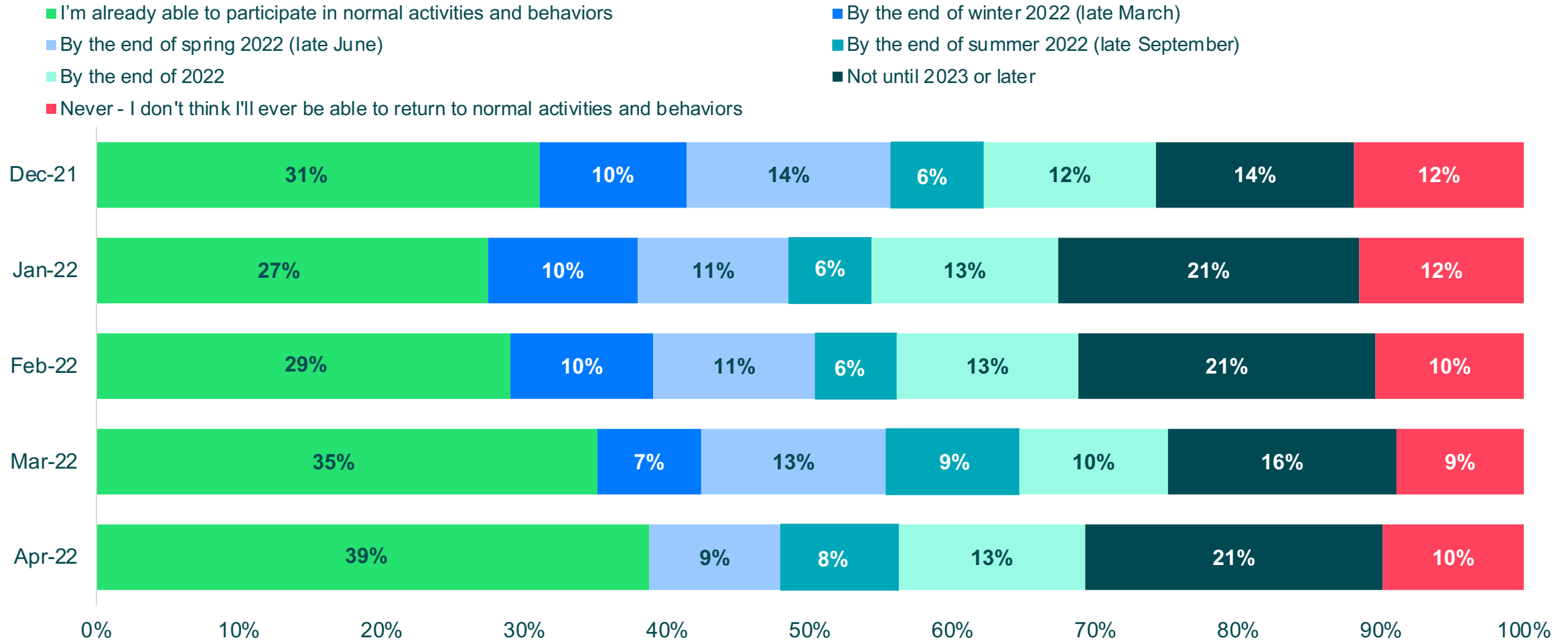


38%

think proof of vaccination should be required for public indoor spaces

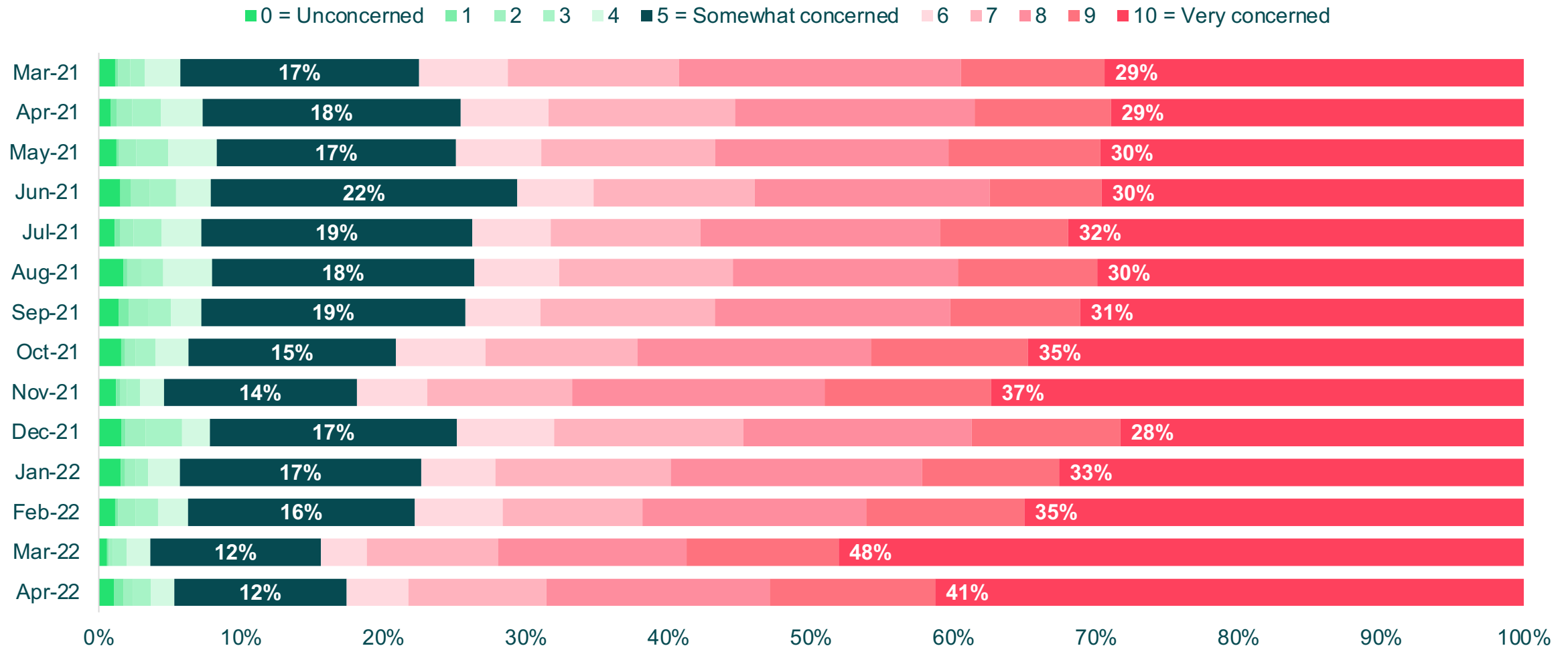
49% of Vaccinated / 9% of Won't Get Vax

# Despite increased comfort, many consumers think a “new normal” is here to stay. 1 in 10 believe things will be back to normal by the end of spring.



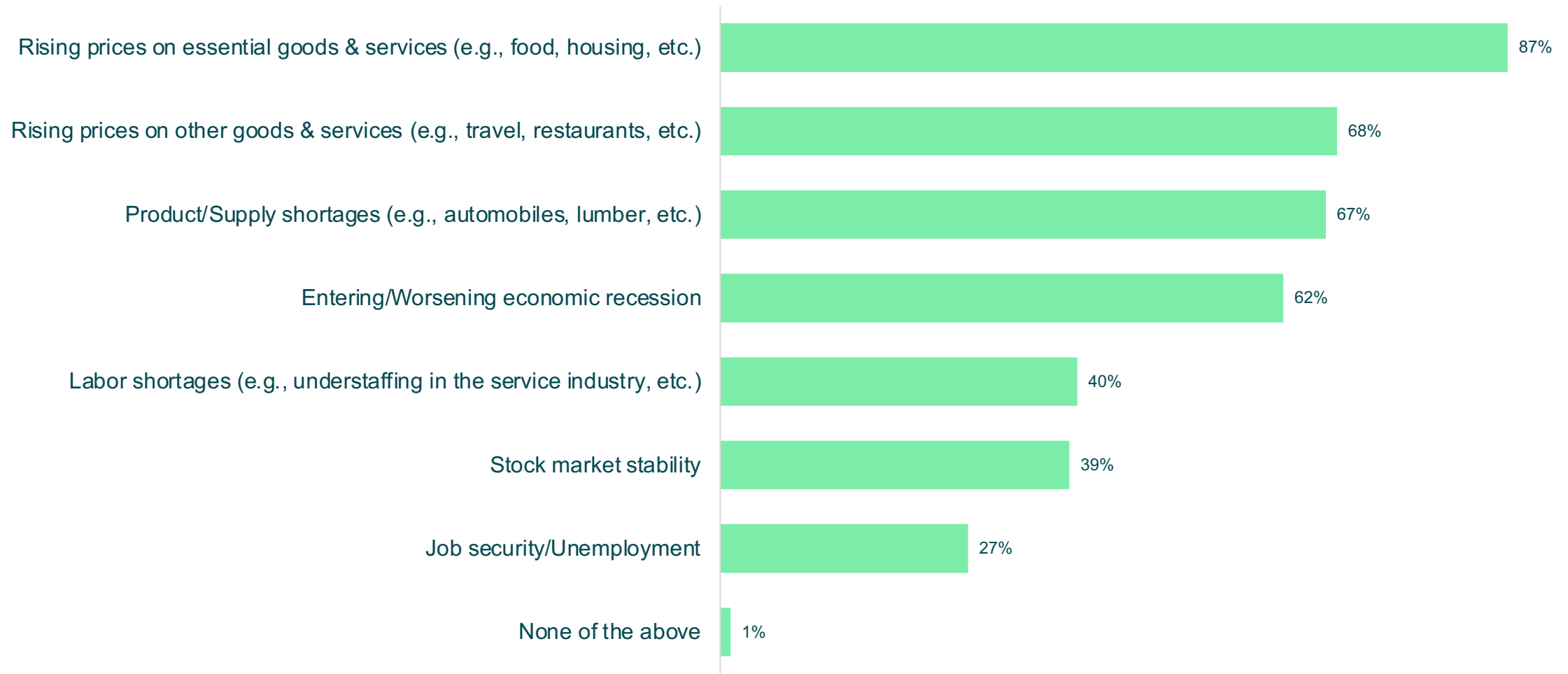
When do you expect to be able to return to normal activities & behaviors?  
Numerator Monthly COVID-19 Sentiment Survey

# Economic Spotlight: The overall level of economic concern remains high from the turn of the year.



What is your level of concern regarding the economy?  
 Numerator Monthly COVID-19 Sentiment Survey

# Economic Spotlight: Inflation effects continue to put pressure on consumer budgets. Rising prices and product shortages are predominant concerns.





## Want to **know more?**

Check out the latest survey updates +  
interactive charts on our website

[numerator.com/coronavirus/consumer-sentiment](https://numerator.com/coronavirus/consumer-sentiment)

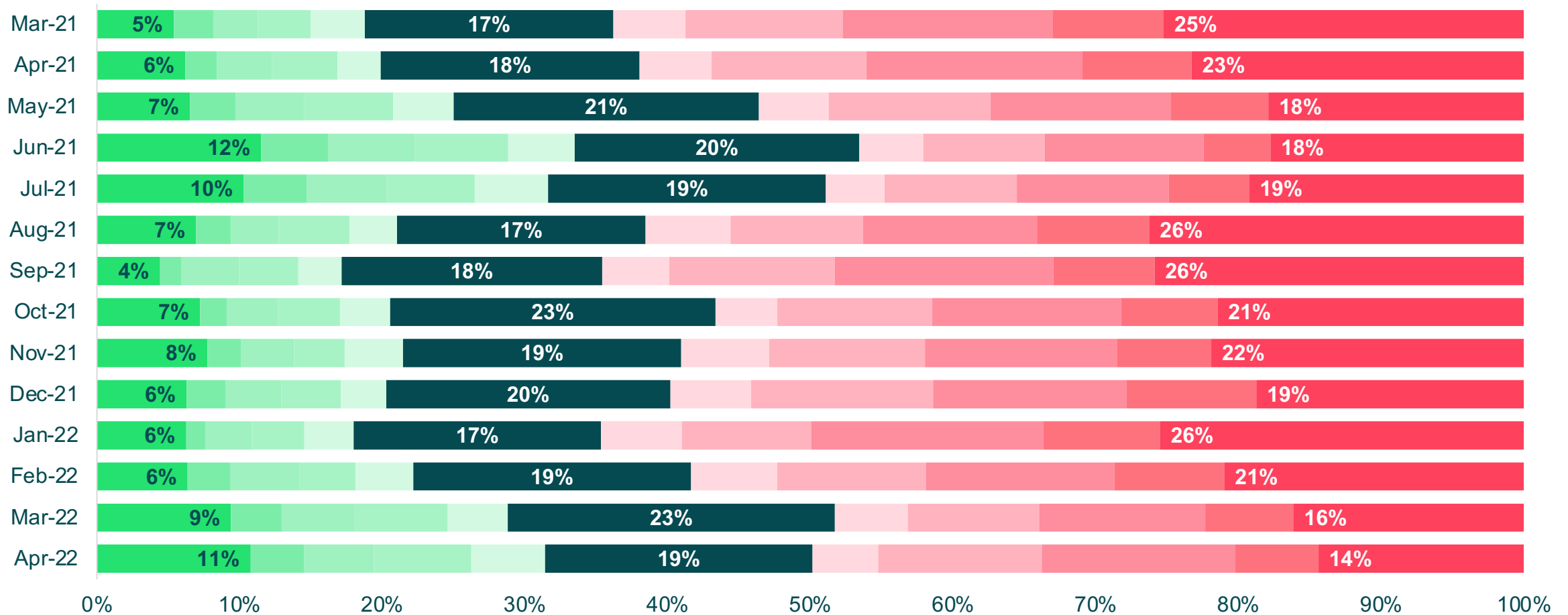


# Appendix: All COVID-19 Charts x Vaccine Status

# COVID-19 Level of Concern

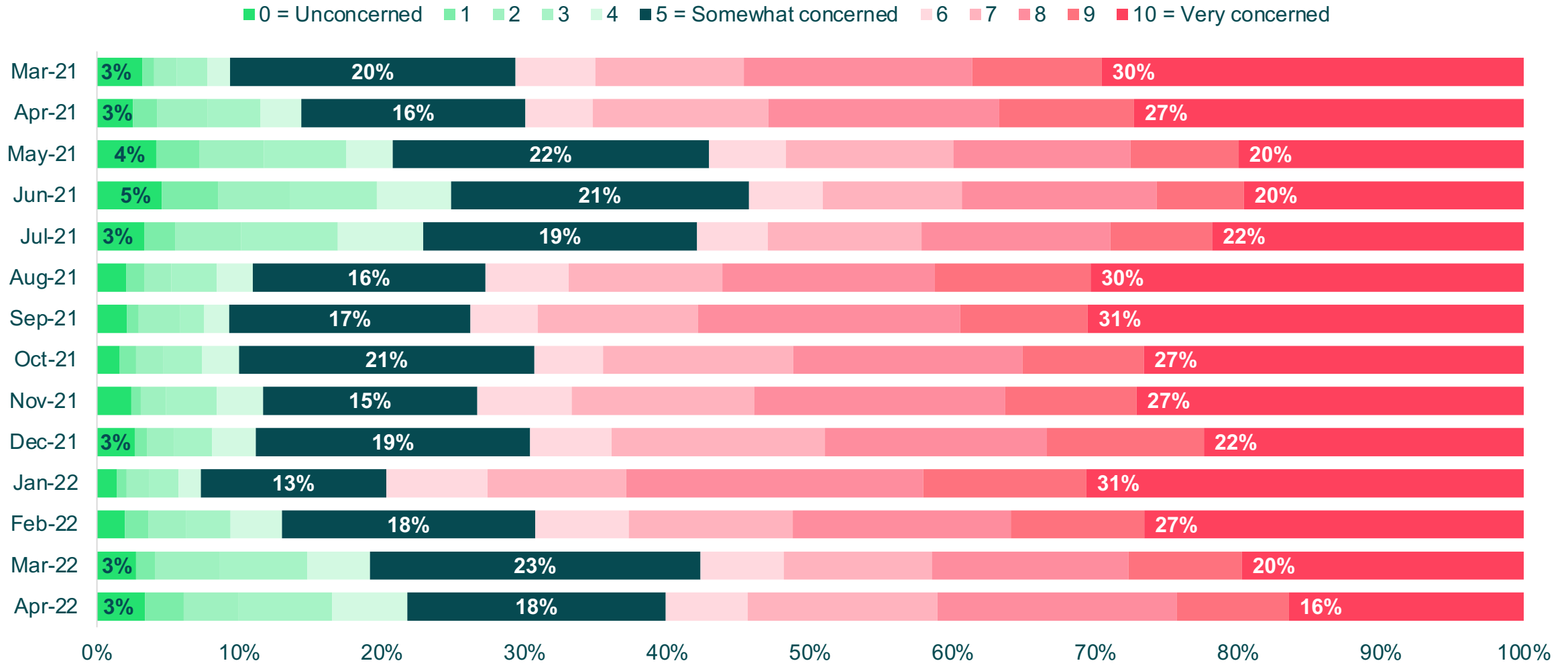
## All Shoppers

0 = Unconcerned 1 2 3 4 5 = Somewhat concerned 6 7 8 9 10 = Very concerned



# COVID-19 Level of Concern

## Vaccinated Shoppers

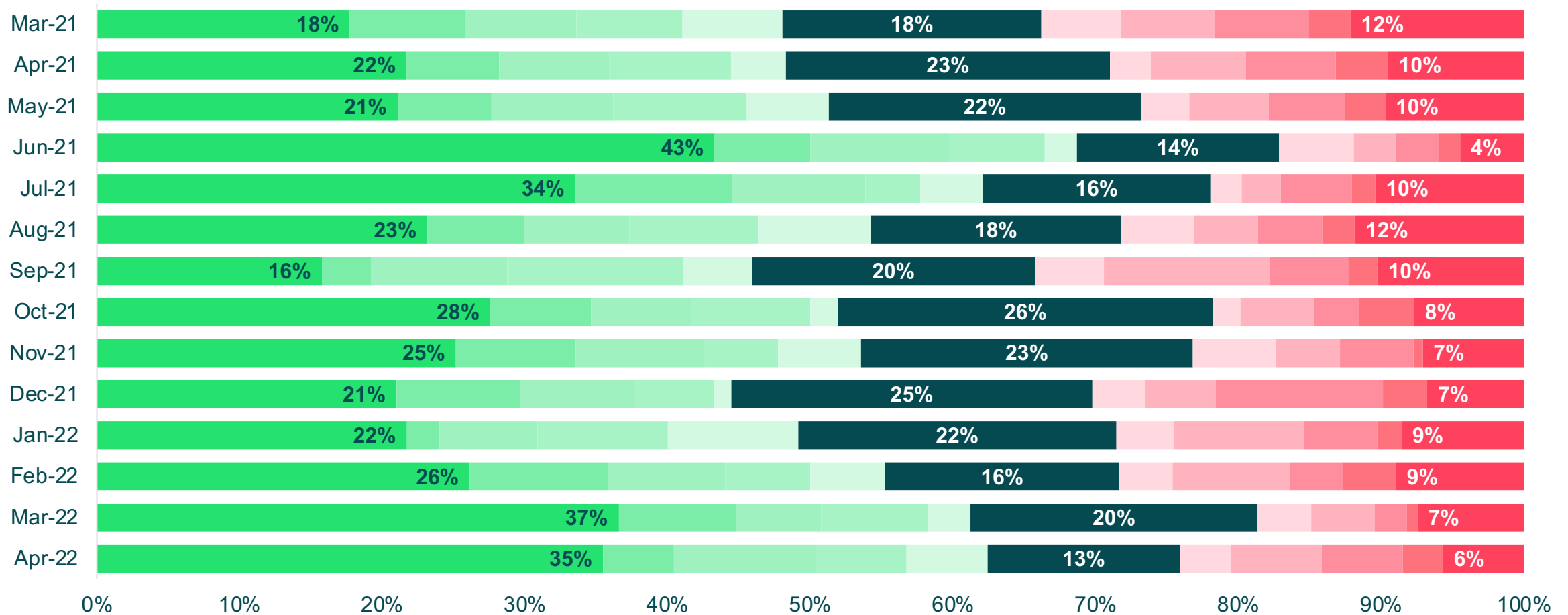


What is your level of concern regarding COVID-19?  
 Numerator Monthly COVID-19 Sentiment Survey

# COVID-19 Level of Concern

## Shoppers Who Won't Get Vaccine

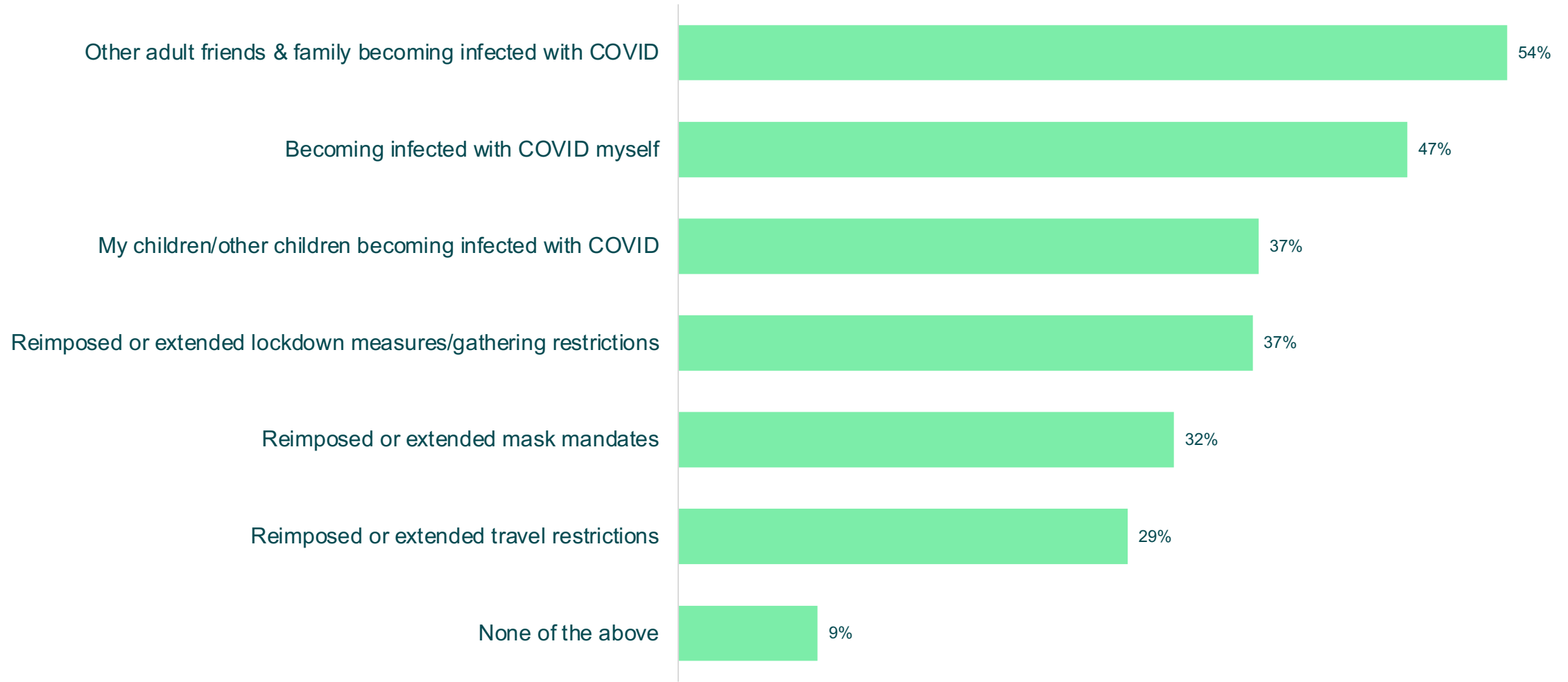
0 = Unconcerned 1 2 3 4 5 = Somewhat concerned 6 7 8 9 10 = Very concerned



What is your level of concern regarding COVID-19?  
 Numerator Monthly COVID-19 Sentiment Survey

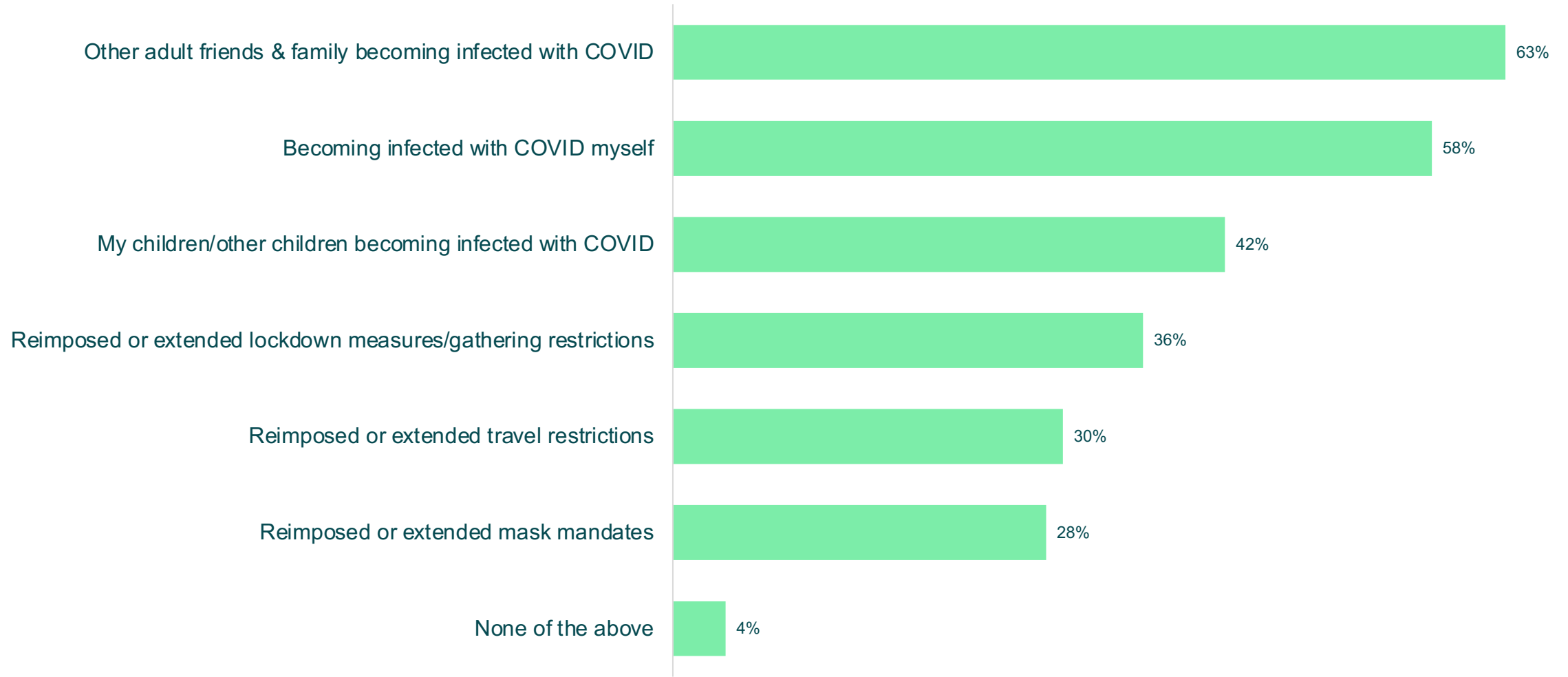
# Specific COVID-19 Concerns

## All Shoppers (April 2022)



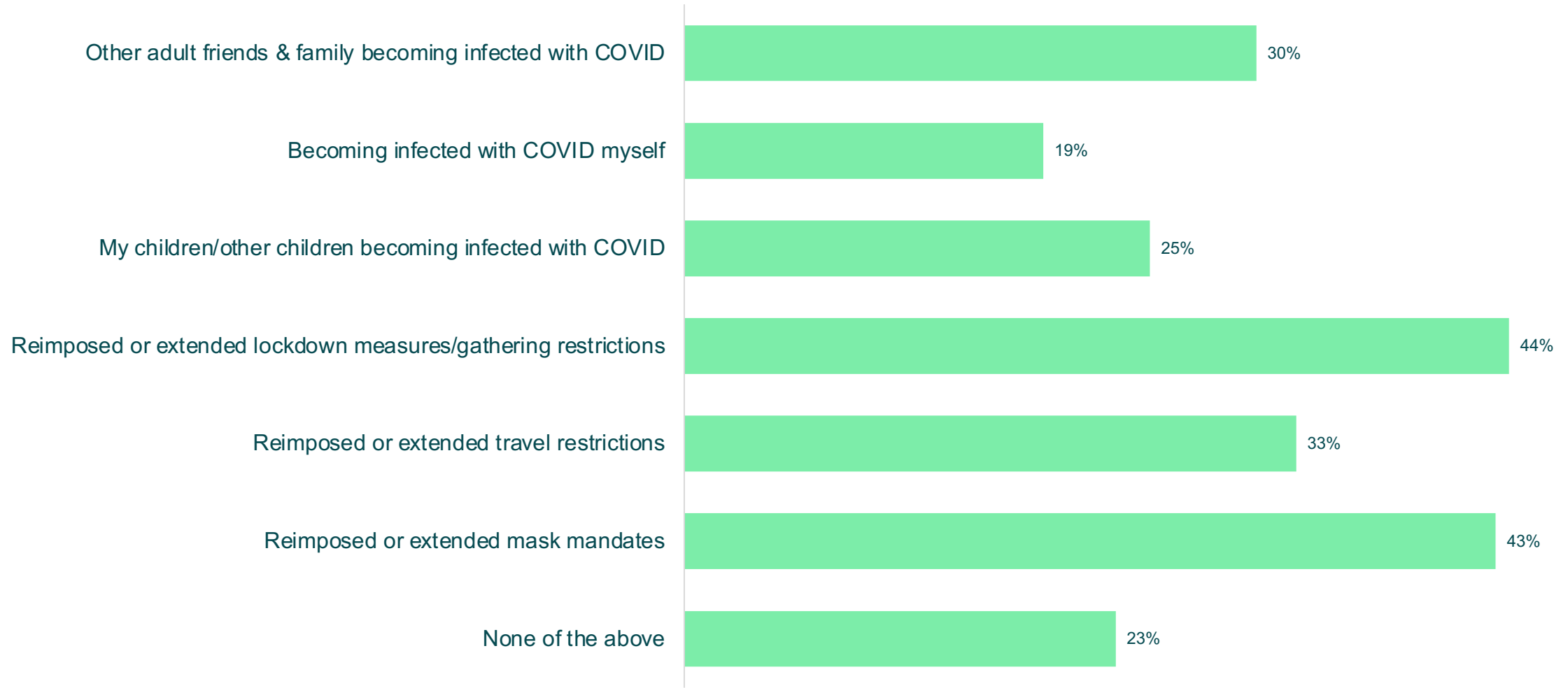
# Specific COVID-19 Concerns

## Vaccinated Shoppers (April 2022)



# Specific COVID-19 Concerns

## Shoppers Who Won't Get Vaccine (April 2022)

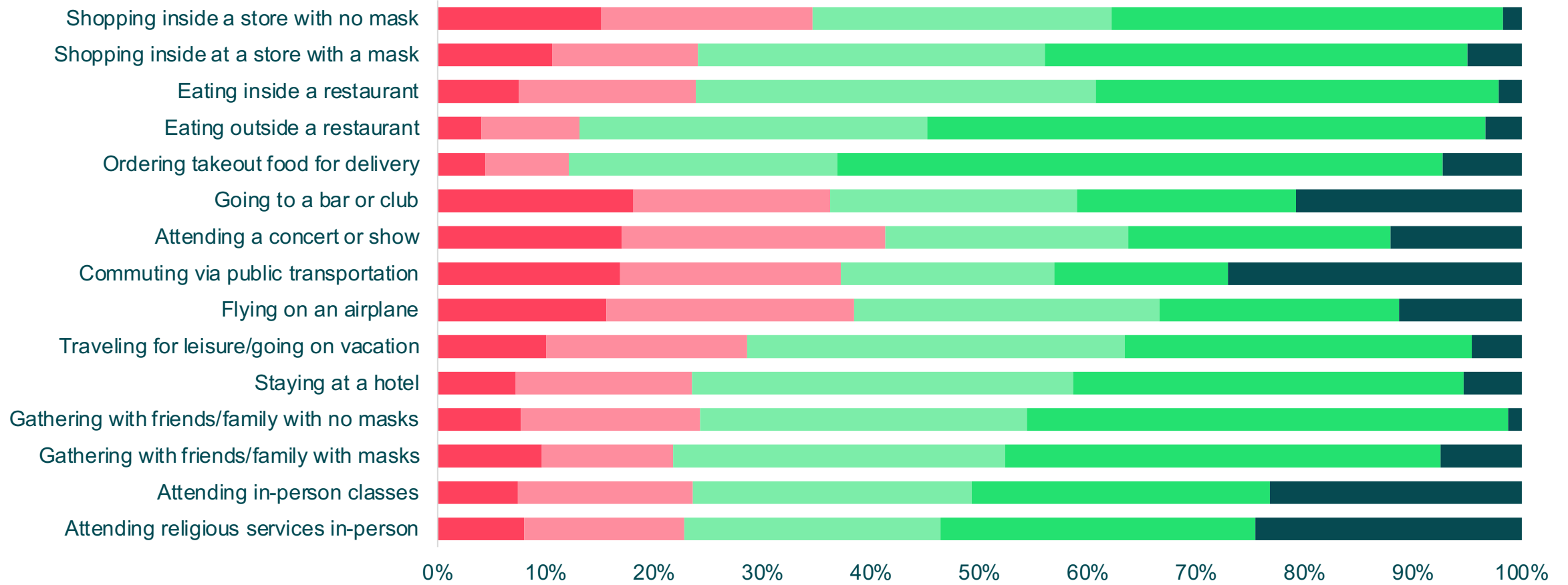




# Consumer Comfort Levels

## All Shoppers (April 2022)

■ Extremely uncomfortable
 ■ Somewhat uncomfortable
 ■ Somewhat comfortable
 ■ Extremely comfortable
 ■ Not applicable – this isn't something I ever do regardless of COVID

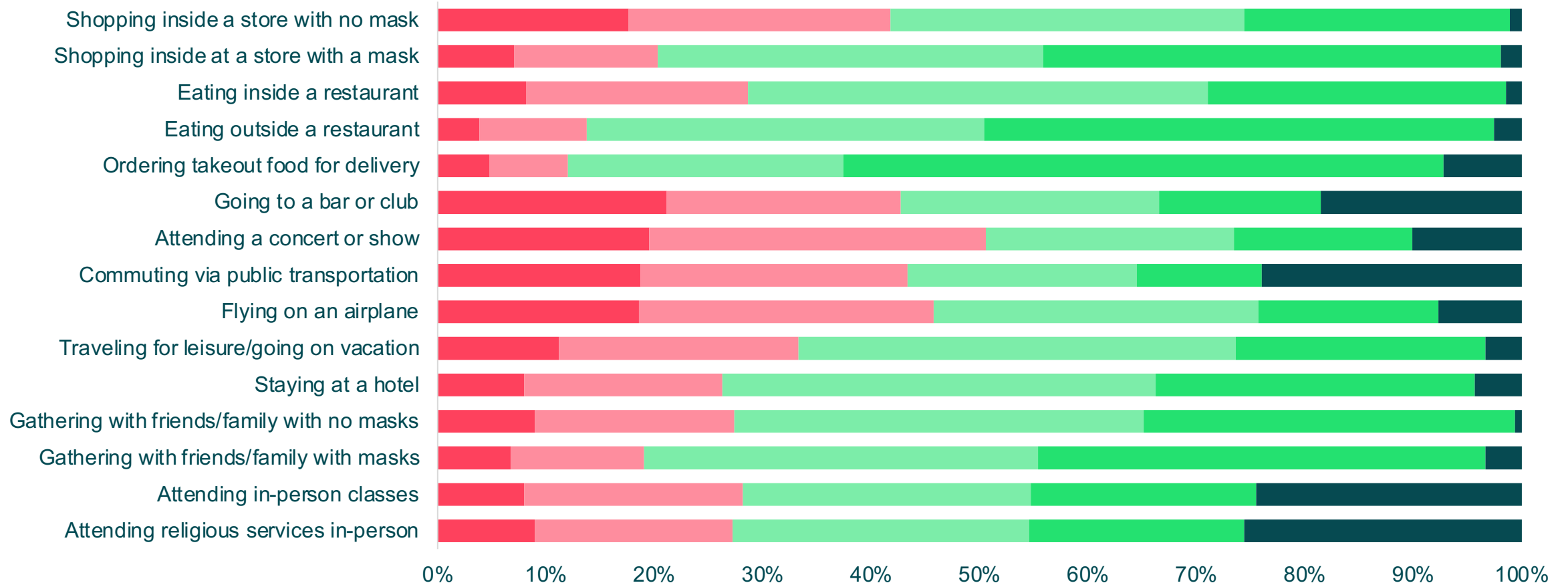


What is your current comfort level personally engaging in these activities/behaviors?  
 Numerator Monthly COVID-19 Sentiment Survey

# Consumer Comfort Levels

## Vaccinated Shoppers (April 2022)

■ Extremely uncomfortable 
 ■ Somewhat uncomfortable 
 ■ Somewhat comfortable 
 ■ Extremely comfortable 
 ■ Not applicable – this isn't something I ever do regardless of COVID

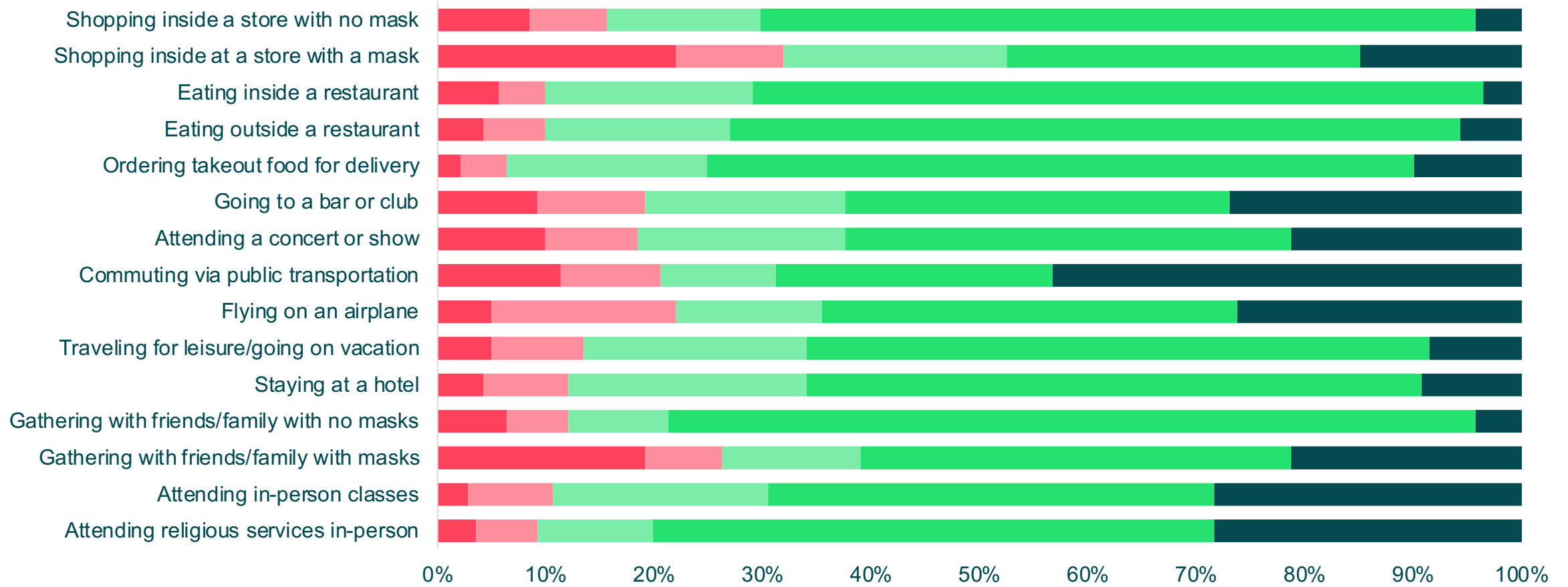


What is your current comfort level personally engaging in these activities/behaviors?  
 Numerator Monthly COVID-19 Sentiment Survey

# Consumer Comfort Levels

## Shoppers Who Won't Get Vaccine (April 2022)

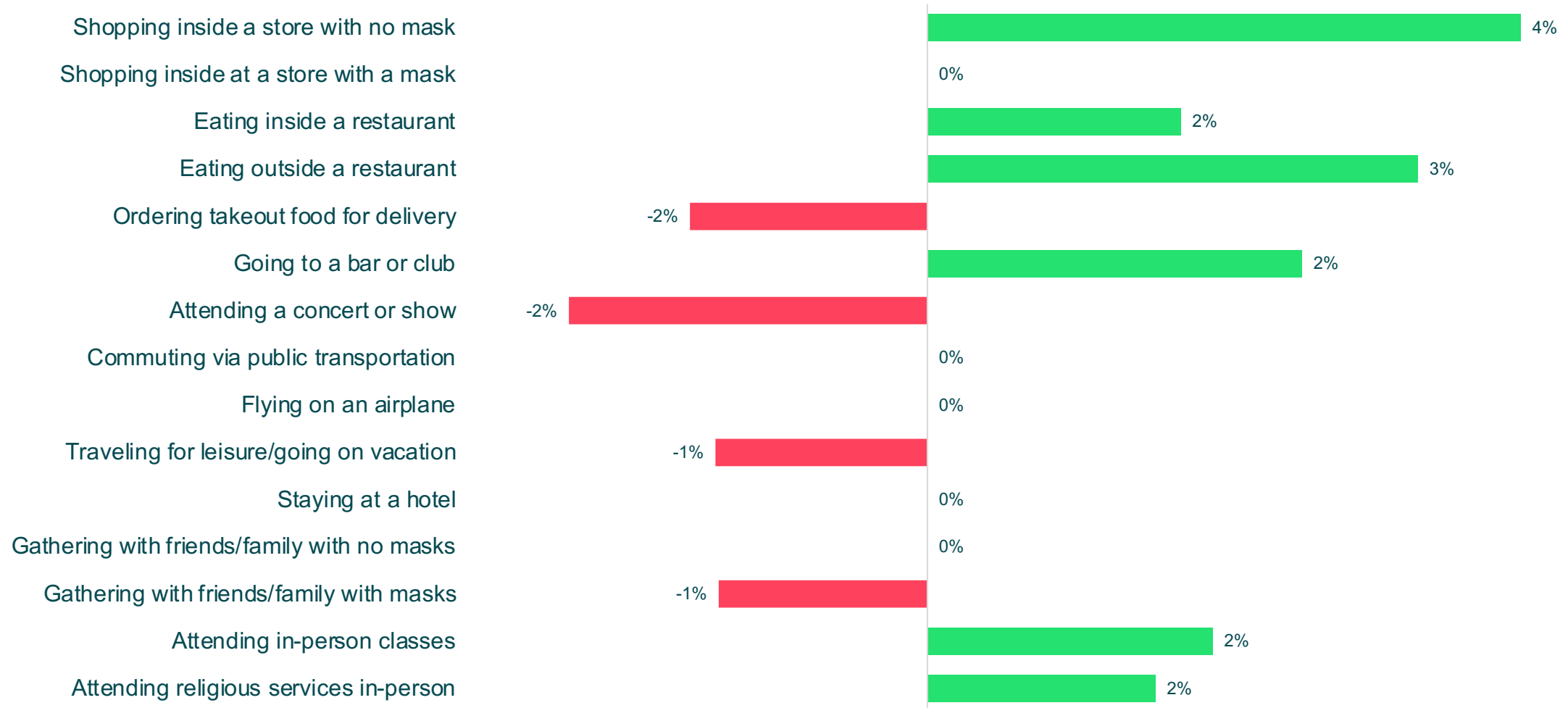
■ Extremely uncomfortable 
 ■ Somewhat uncomfortable 
 ■ Somewhat comfortable 
 ■ Extremely comfortable 
 ■ Not applicable – this isn't something I ever do regardless of COVID



What is your current comfort level personally engaging in these activities/behaviors?  
 Numerator Monthly COVID-19 Sentiment Survey

# Change in Consumer Comfort Levels

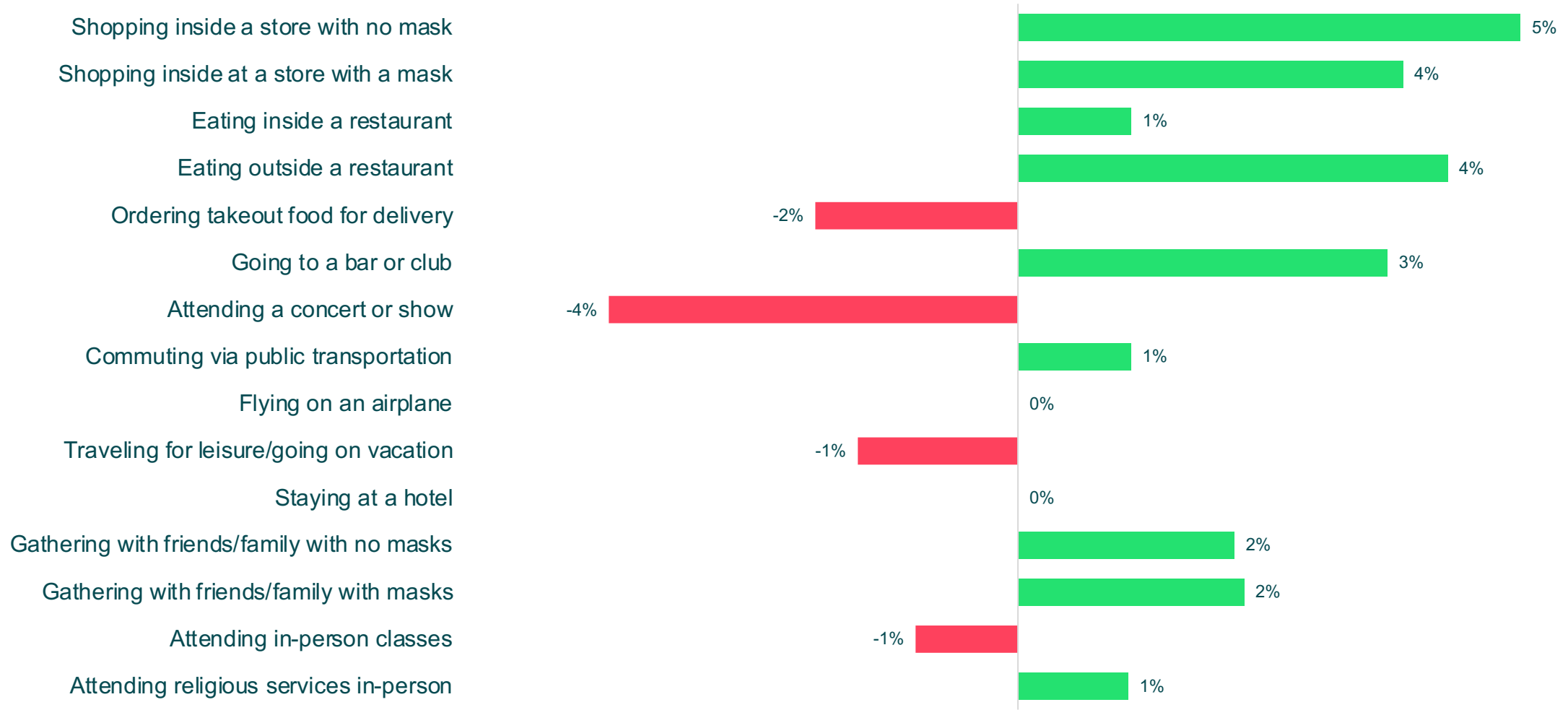
## All Shoppers (April vs. March 2022)



What is your current comfort level personally engaging in these activities/behaviors? Change in % comfortable  
Numerator Monthly COVID-19 Sentiment Survey

# Change in Consumer Comfort Levels

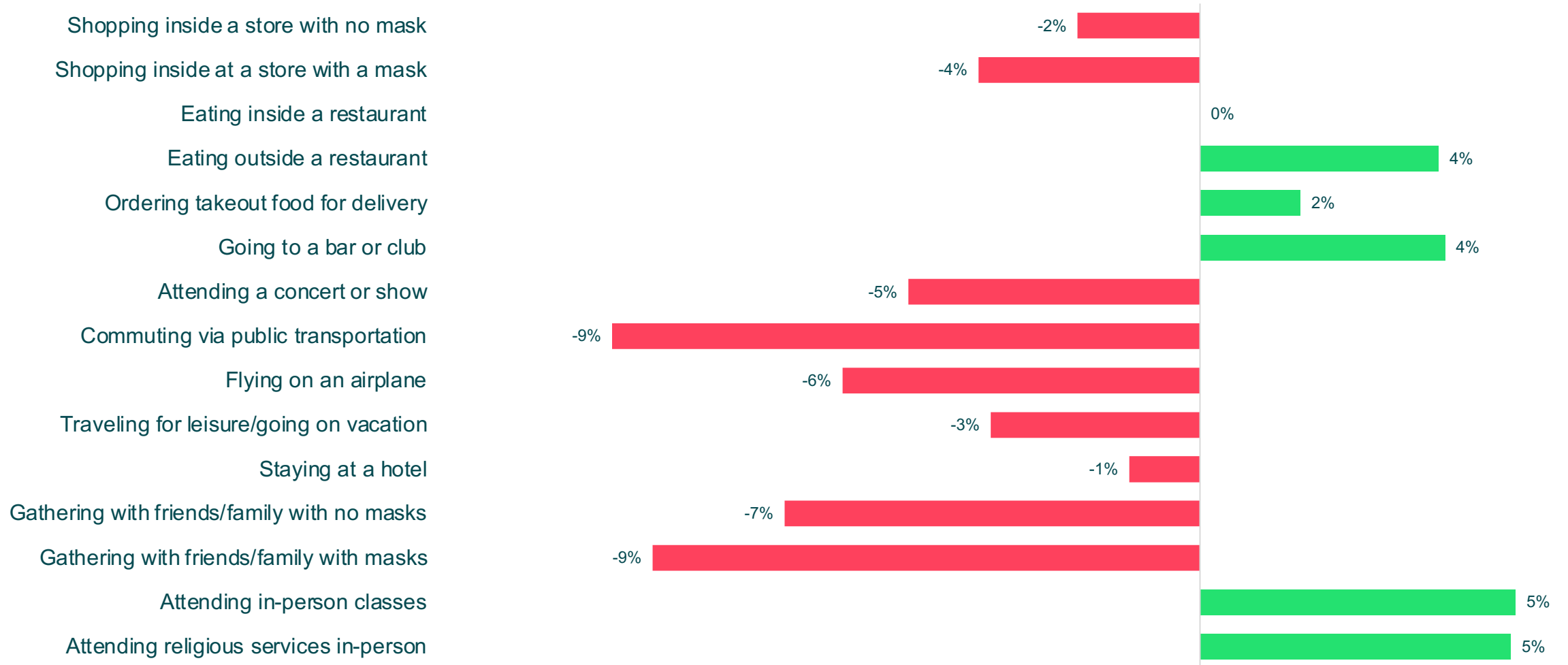
## Vaccinated Shoppers (April vs. March 2022)



What is your current comfort level personally engaging in these activities/behaviors? Change in % comfortable  
Numerator Monthly COVID-19 Sentiment Survey

# Change in Consumer Comfort Levels

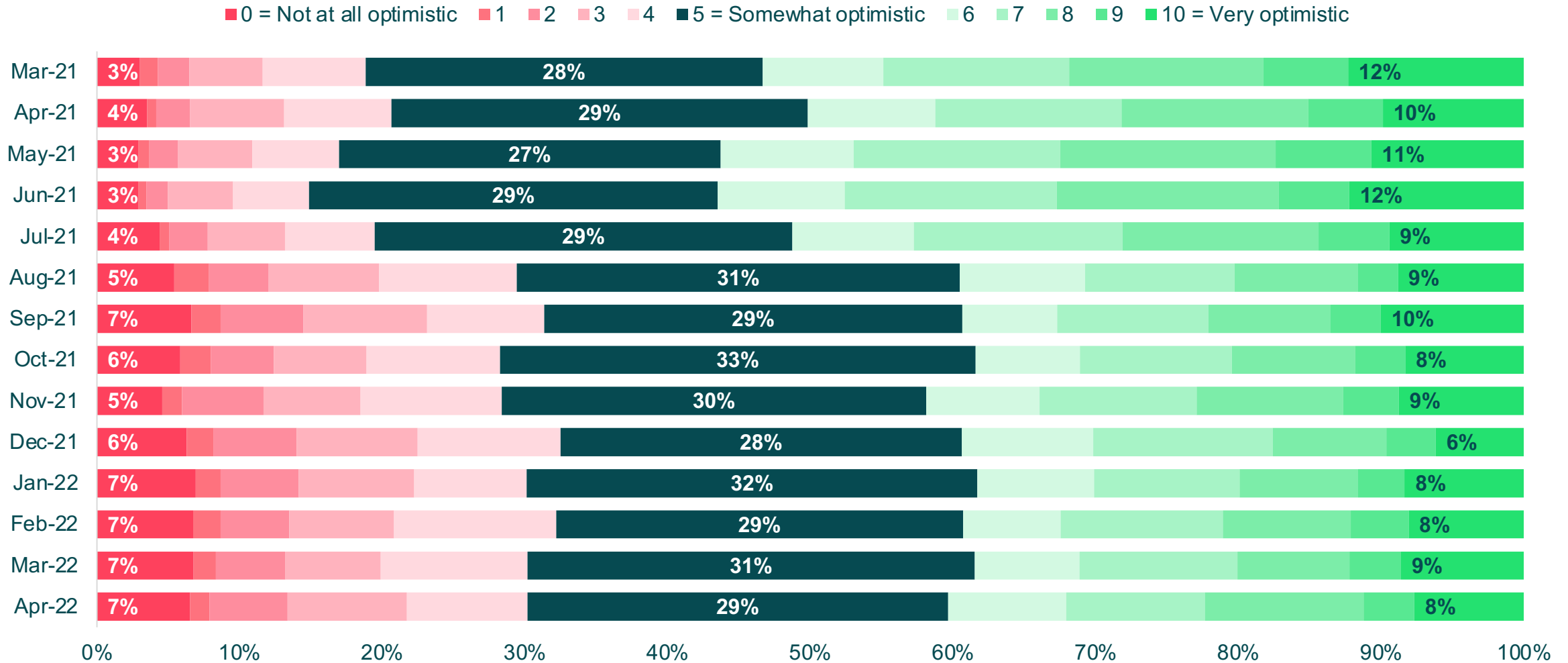
## Shoppers Who Won't Get Vaccine (April vs. March 2022)



What is your current comfort level personally engaging in these activities/behaviors? Change in % comfortable  
Numerator Monthly COVID-19 Sentiment Survey

# Optimism for Return to Normal

## All Shoppers

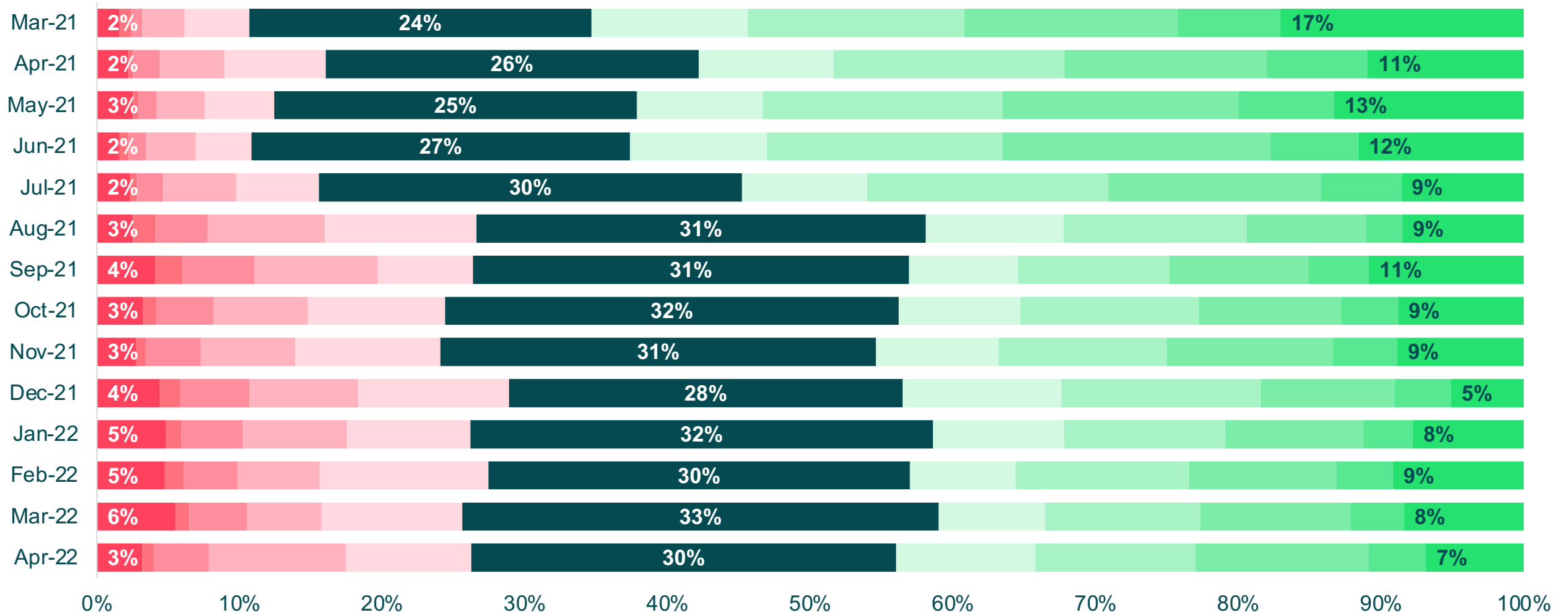


What is your level of optimism about a return to normal?  
 Numerator Monthly COVID-19 Sentiment Survey

# Optimism for Return to Normal

## Vaccinated Shoppers

0 = Not at all optimistic 1 2 3 4 5 = Somewhat optimistic 6 7 8 9 10 = Very optimistic



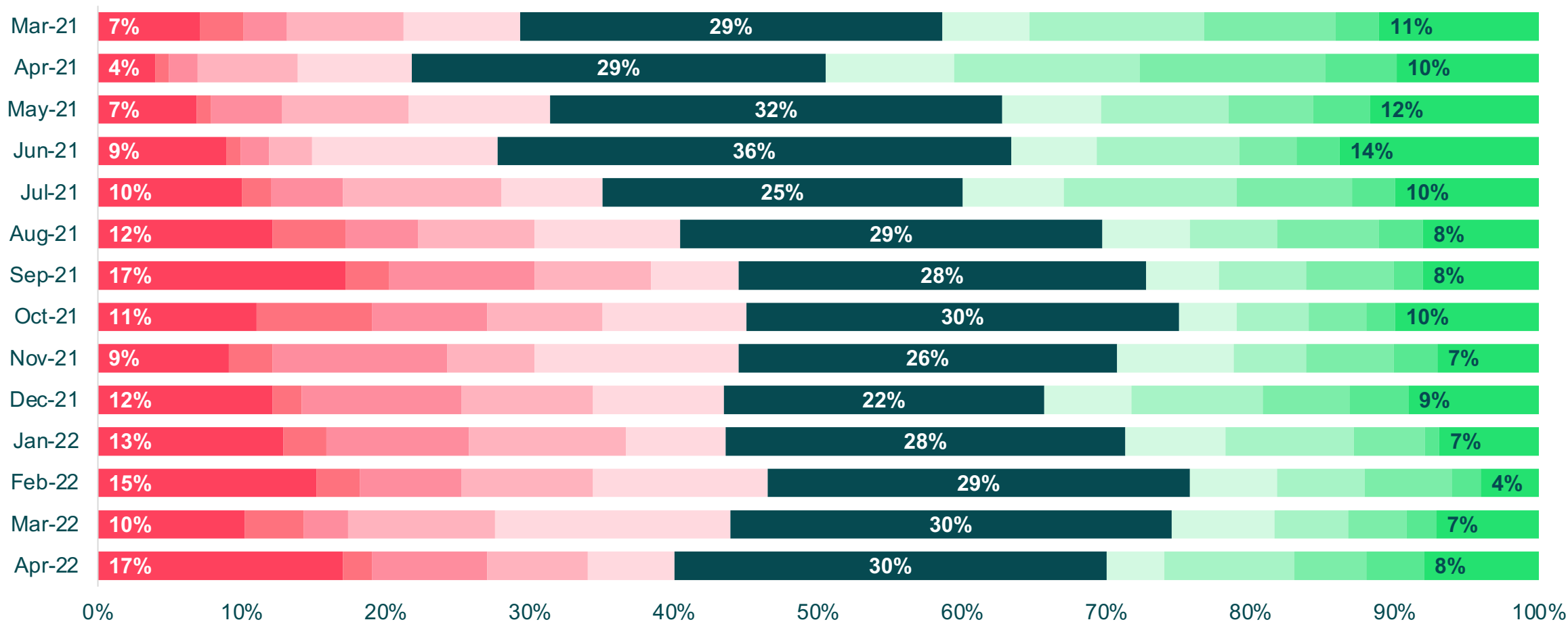
What is your level of optimism about a return to normal?  
 Numerator Monthly COVID-19 Sentiment Survey



# Optimism for Return to Normal

## Shoppers Who Won't Get Vaccine

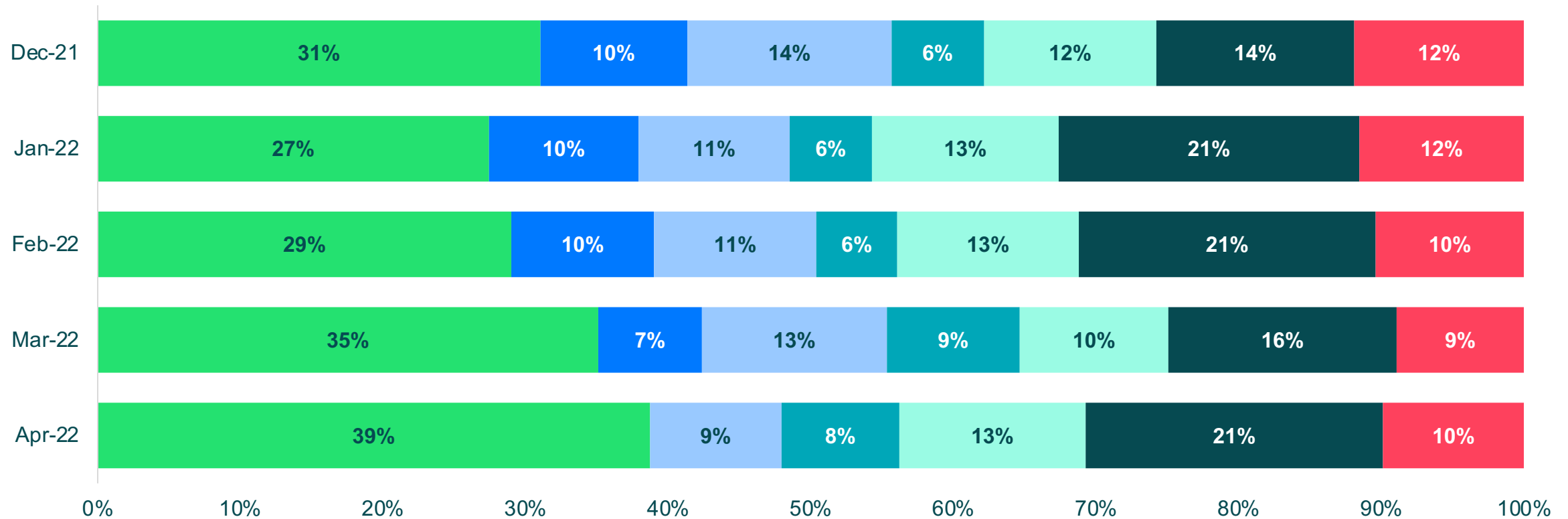
0 = Not at all optimistic 1 2 3 4 5 = Somewhat optimistic 6 7 8 9 10 = Very optimistic



What is your level of optimism about a return to normal?  
 Numerator Monthly COVID-19 Sentiment Survey

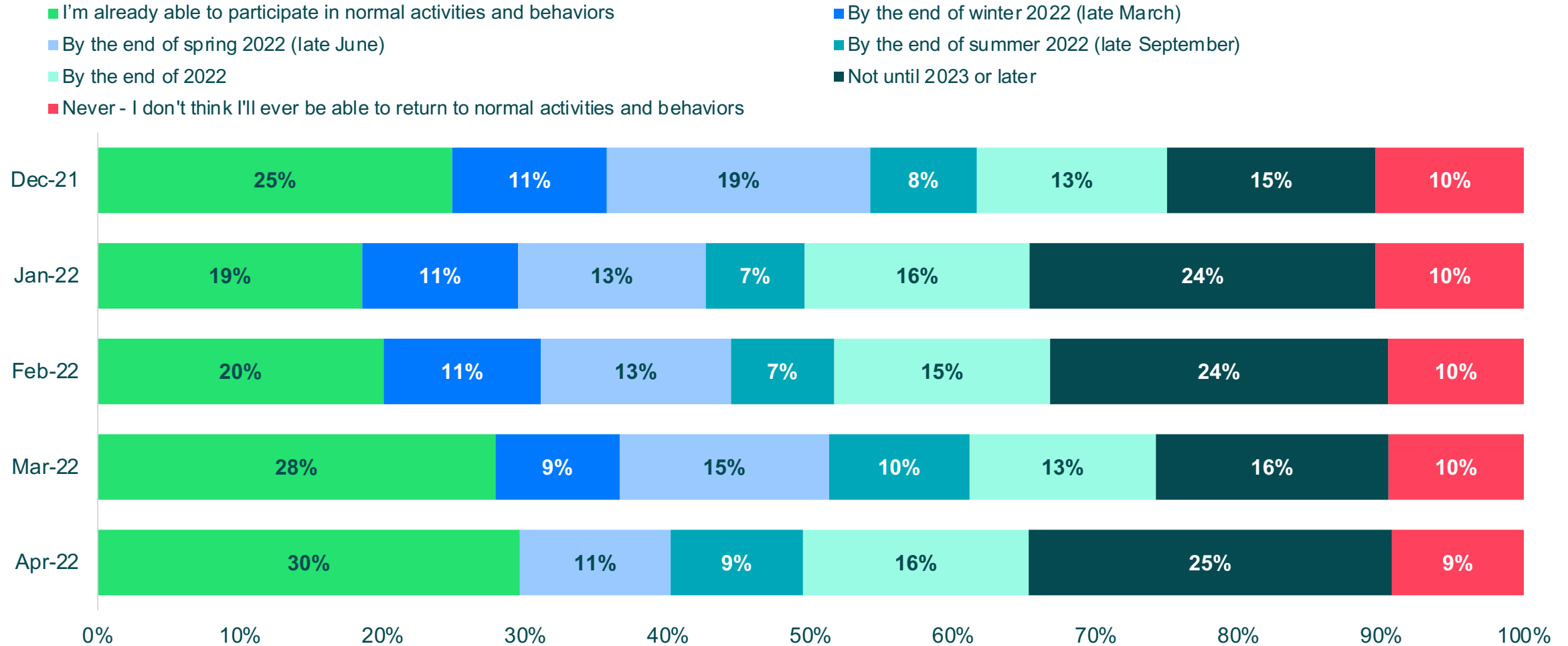
# Timing Expectations for Normal All Shoppers

- I'm already able to participate in normal activities and behaviors
- By the end of winter 2022 (late March)
- By the end of spring 2022 (late June)
- By the end of summer 2022 (late September)
- By the end of 2022
- Not until 2023 or later
- Never - I don't think I'll ever be able to return to normal activities and behaviors



When do you expect to be able to return to normal activities & behaviors?  
Numerator Monthly COVID-19 Sentiment Survey

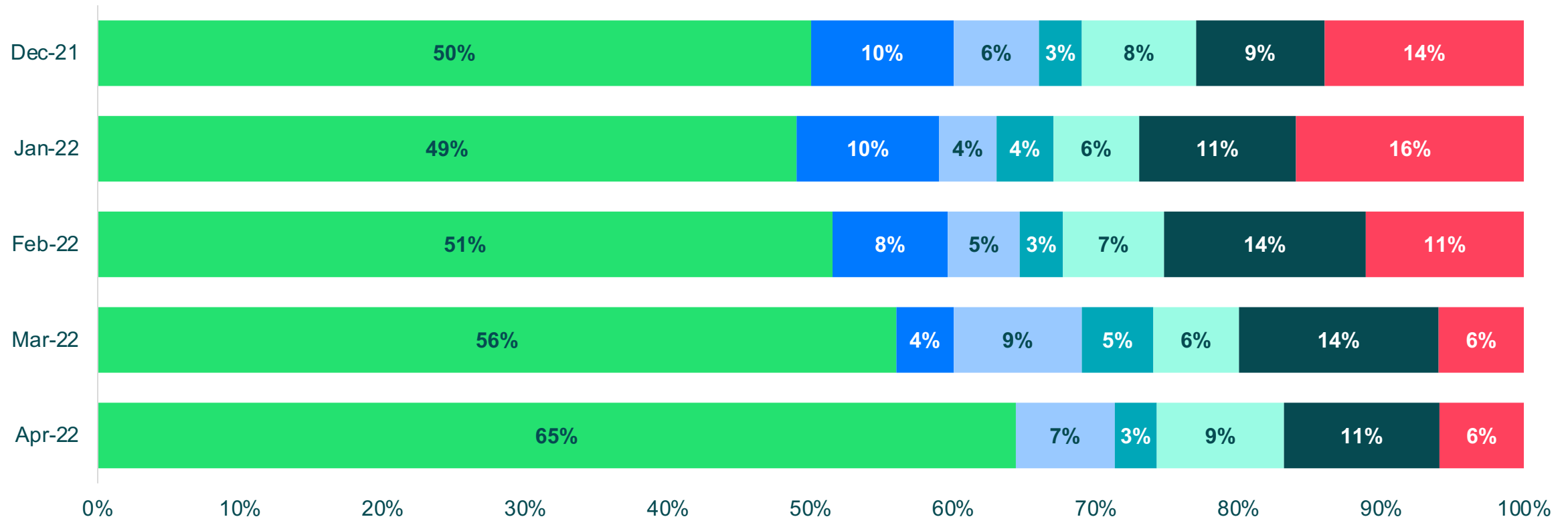
# Timing Expectations for Normal Vaccinated Shoppers



When do you expect to be able to return to normal activities & behaviors?  
Numerator Monthly COVID-19 Sentiment Survey

# Timing Expectations for Normal Shoppers Who Won't Get Vaccine

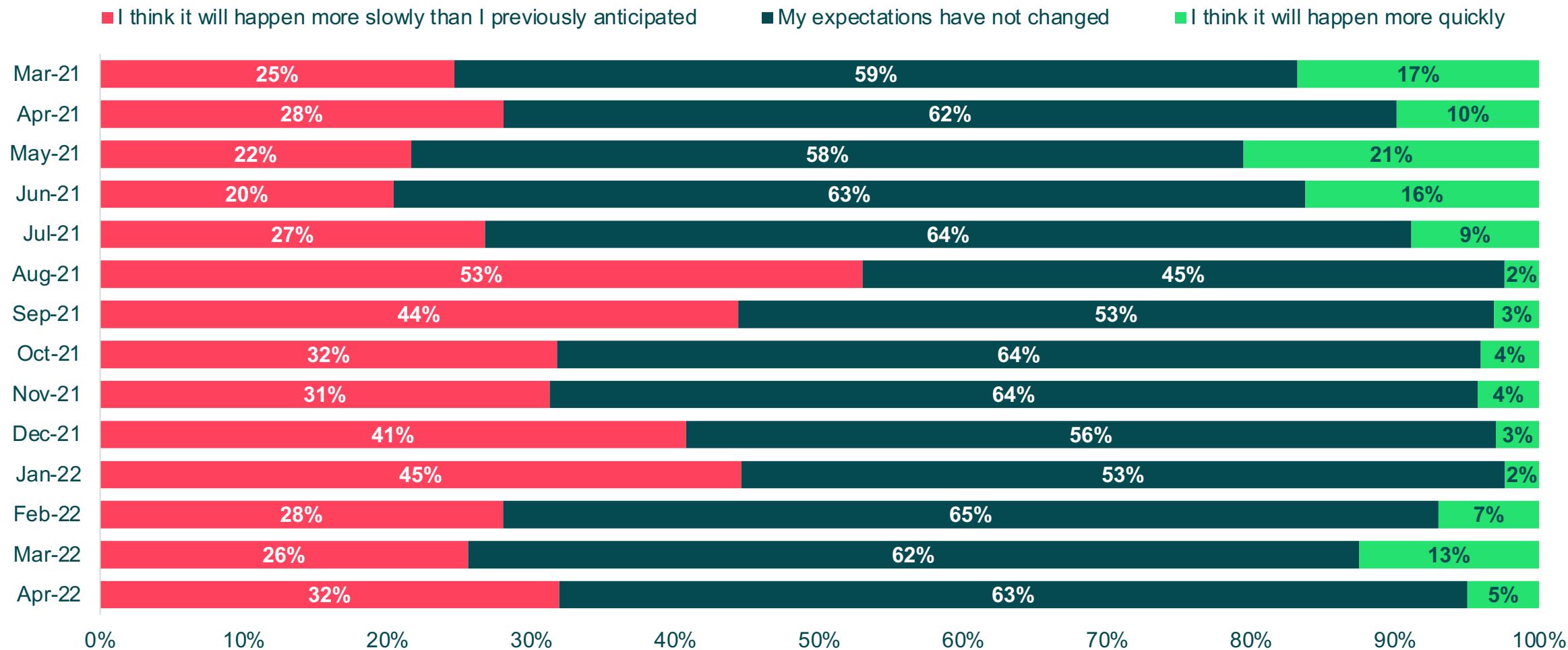
- I'm already able to participate in normal activities and behaviors
- By the end of winter 2022 (late March)
- By the end of spring 2022 (late June)
- By the end of summer 2022 (late September)
- By the end of 2022
- Not until 2023 or later
- Never - I don't think I'll ever be able to return to normal activities and behaviors



When do you expect to be able to return to normal activities & behaviors?  
Numerator Monthly COVID-19 Sentiment Survey

# Change in Timing Expectations

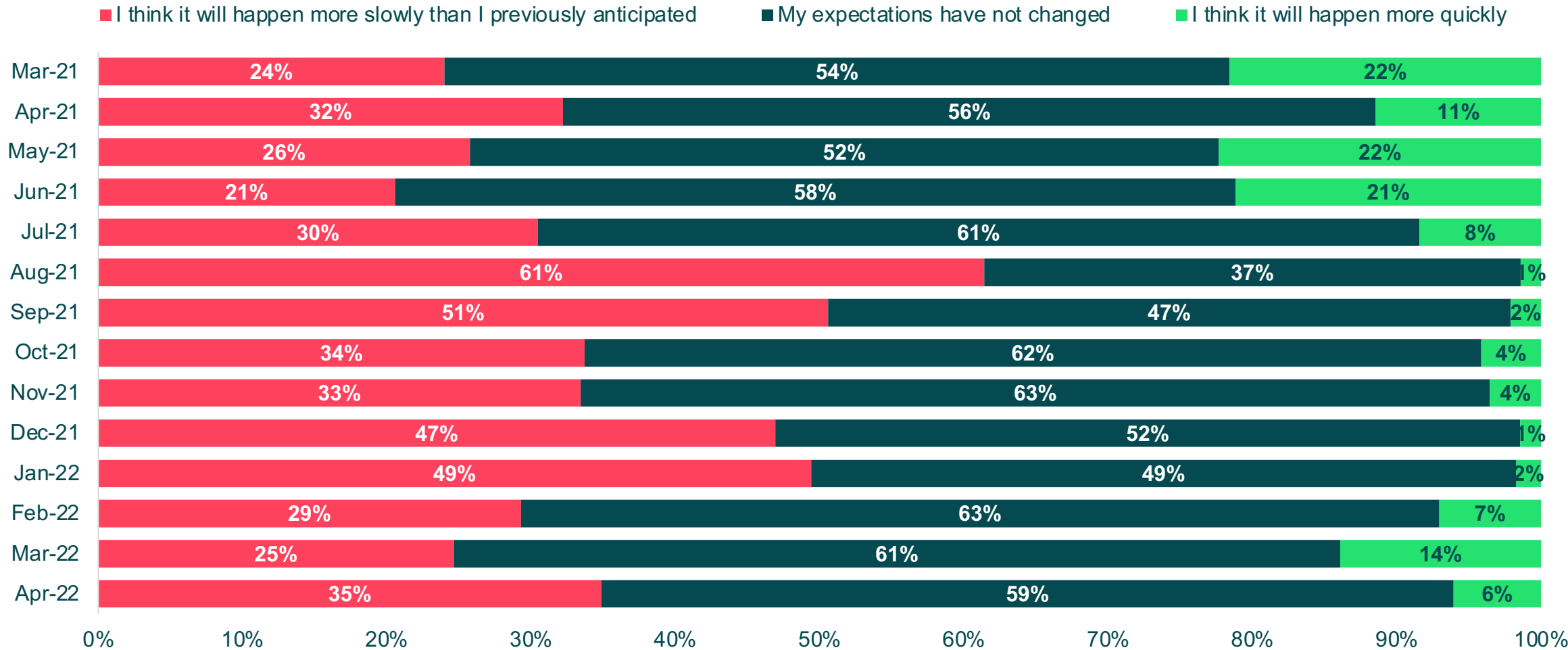
## All Shoppers



How does your expectation for a return to normal compare to last month?  
Numerator Monthly COVID-19 Sentiment Survey

# Change in Timing Expectations

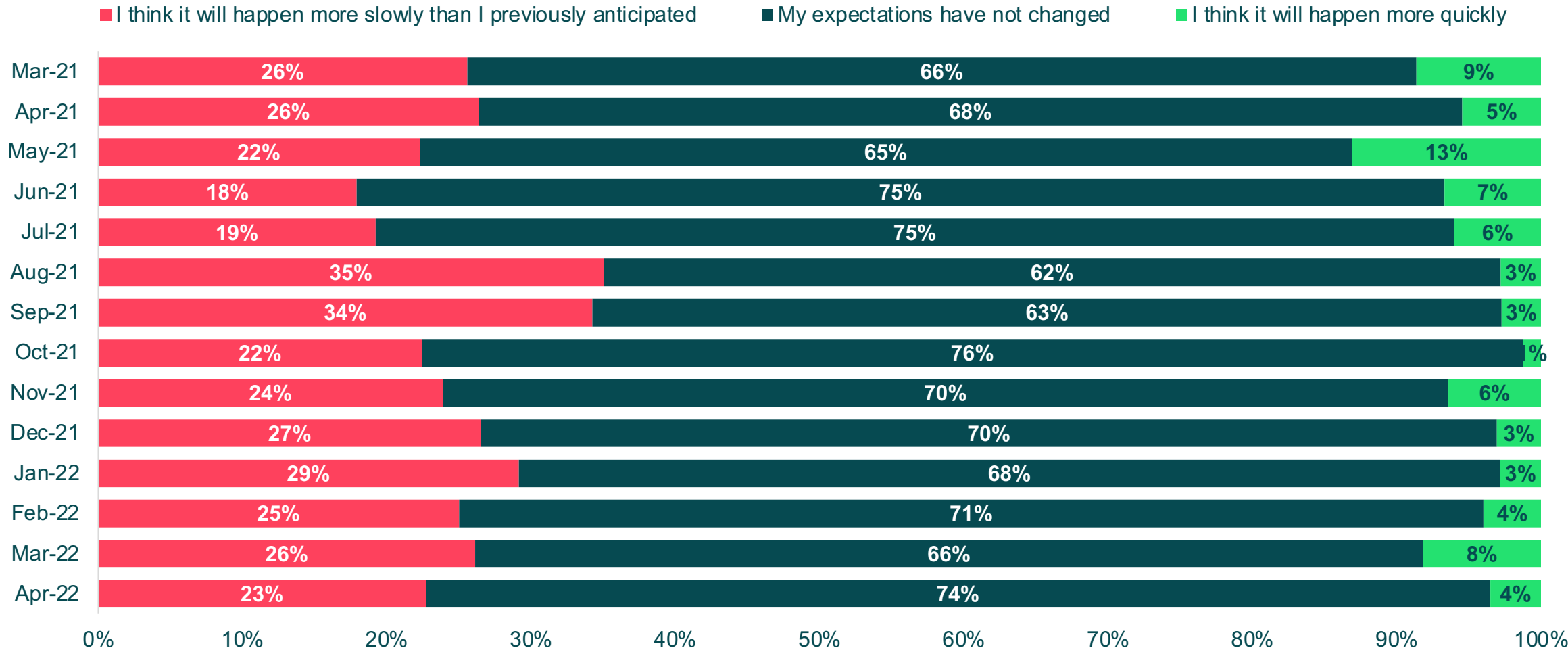
## Vaccinated Shoppers



How does your expectation for a return to normal compare to last month?  
Numerator Monthly COVID-19 Sentiment Survey

# Change in Timing Expectations

## Shoppers Who Won't Get Vaccine



How does your expectation for a return to normal compare to last month?  
Numerator Monthly COVID-19 Sentiment Survey