



US COVID-19 Consumer Sentiment & Behavior

2021 Monthly Study: March – August



About the Survey

CONSUMER SENTIMENT & BEHAVIOR 2021

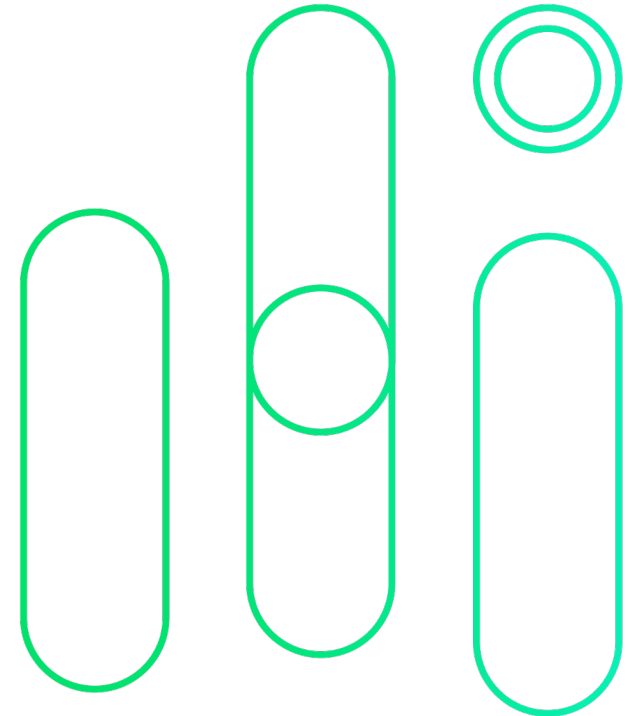
Numerator's consumer sentiment survey is fielded to 1,000+ consumers on a monthly basis. Responses are shown at a total level & broken out by COVID-19 vaccine status, based on Numerator's Premium Vaccine People Groups.

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

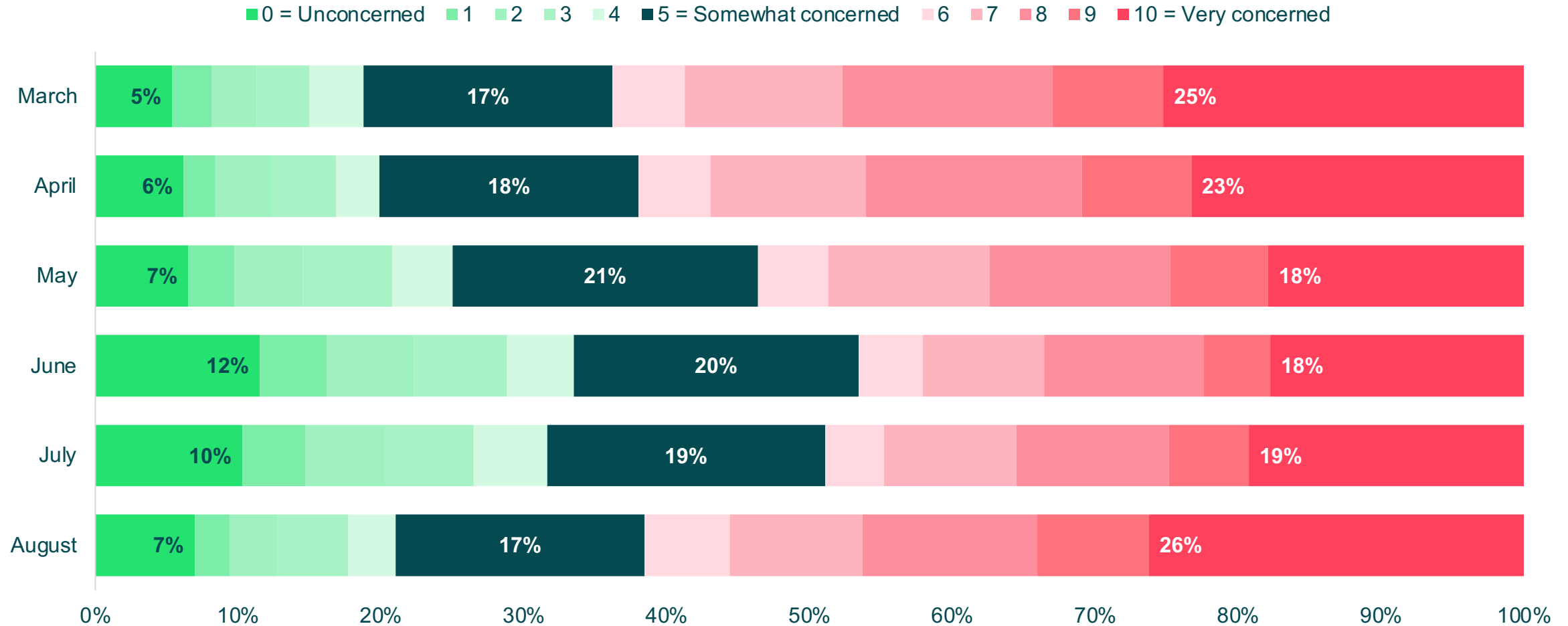
Waves 4+ (June+) are broken out based on updated vaccine status & intention information gathered from consumers May 2021. Breakouts include Vaccinated & Won't Get Vaccine. *Consumers who are unsure or still awaiting their vaccine are included in the survey sample and total rollout, but are not specifically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

Timing & Sample Size of Waves:

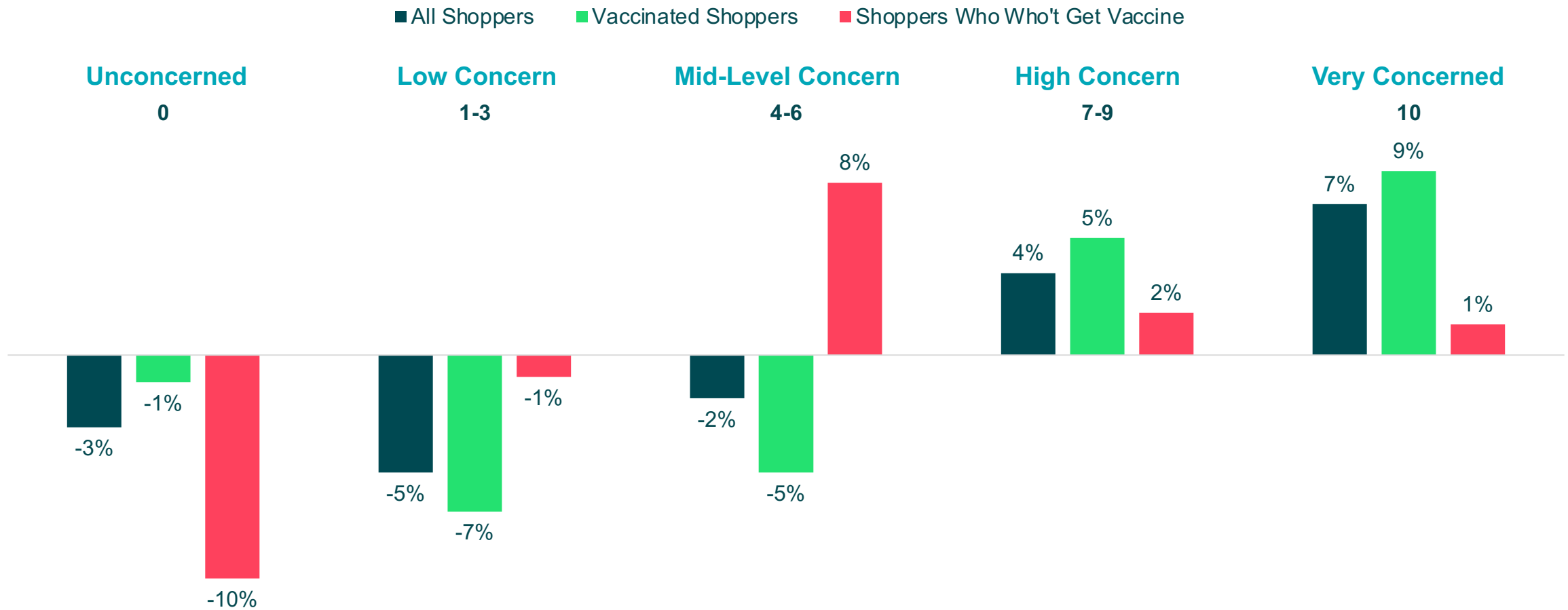
- Wave 1: March 15, n= 2,083
- Wave 2: April 18, n= 2,262
- Wave 3: May 17, n= 2,316
- Wave 4: June 12, n= 1,069 (*updated sample information)
- Wave 5: July 15, n= 1,071
- Wave 6: August 13, n= 1,108 (*added & tweaked select questions)



Level of concern regarding COVID-19 increased significantly in August 2021, reaching its highest level since March.



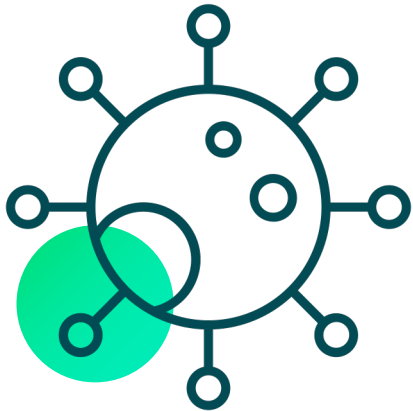
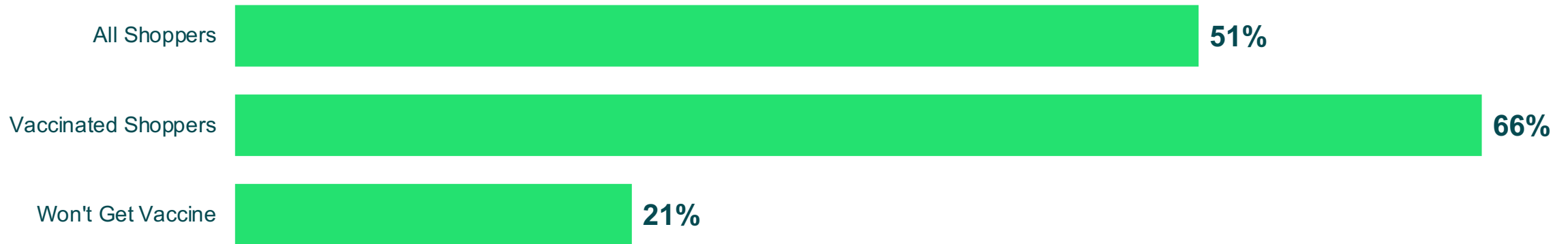
While Vaccinated shoppers shifted from mid to high levels of concern, those not getting the vaccine moved from unconcerned to mid-level concern.



What is your level of concern regarding COVID-19? Change August vs. July 2021 x Vaccine Status
Numerator August vs. July COVID-19 Sentiment Survey

Spread of the Delta Variant is a significant concern for many consumers, even those who are vaccinated.

Worried about the Delta Variant



50%

of consumers are more worried about the Delta variant than they were the original strain

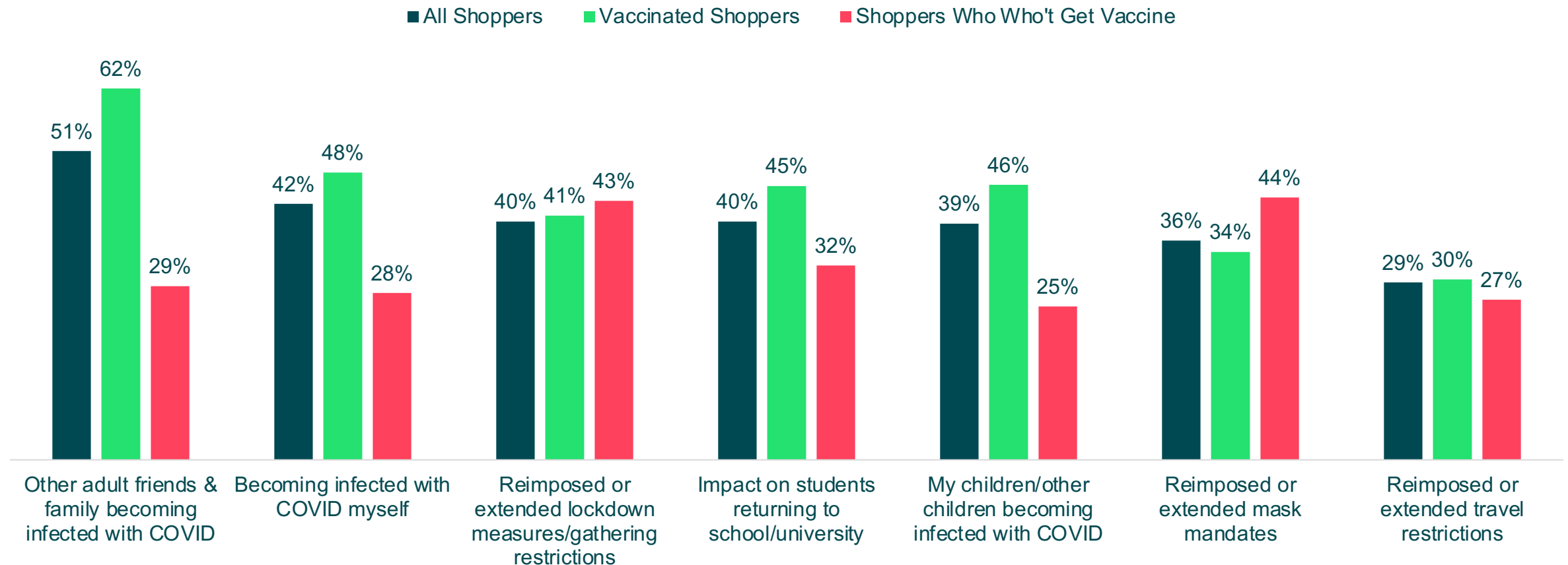
61% of Vaccinated / 22% of Won't Get Vax

61%

of consumers think the Delta variant will cause a return to lockdowns where they live

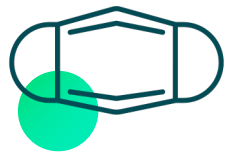
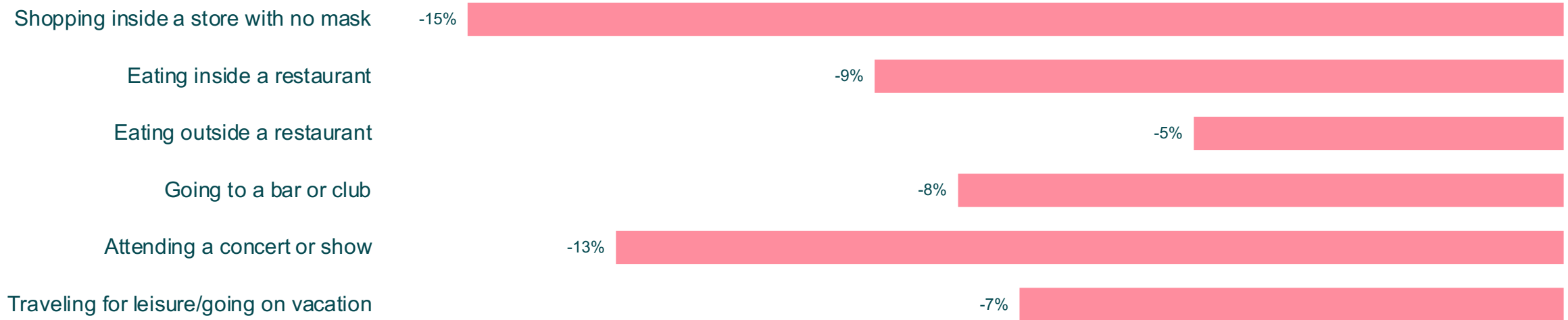
67% of Vaccinated / 51% of Won't Get Vax

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 with all out-of-home activities declined in August.

Changes in comfort levels: August vs. July



53%

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

63% of Vaccinated / 25% of Won't Get Vax



46%

of consumers prefer to shop at retailers that require masks

56% of Vaccinated / 22% of Won't Get Vax



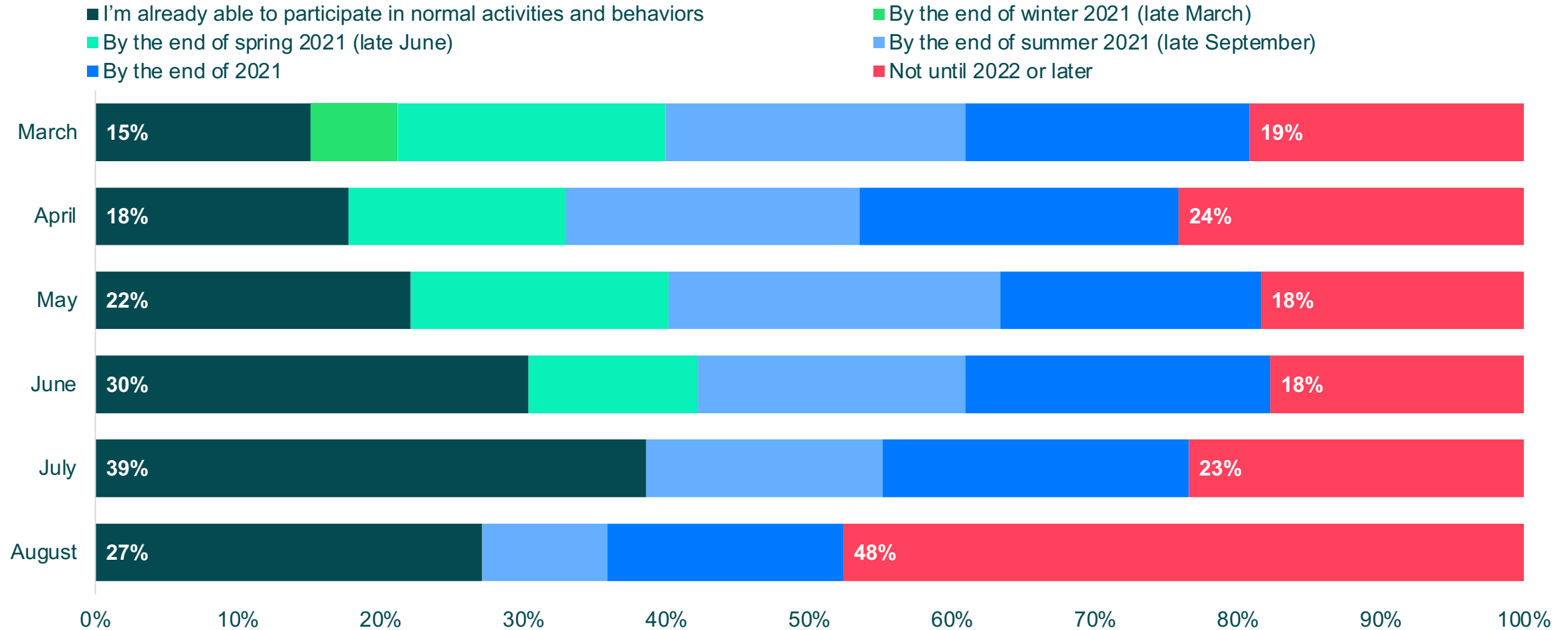
43%

think proof of vaccination should be required for public indoor spaces

60% of Vaccinated / 12% of Won't Get Vax

What is your level of comfort personally engaging in the following activities? % comfortable or extremely comfortable August vs. July
How much do you agree or disagree with the following statements? | Numerator August COVID-19 Sentiment Survey

Consumers are pushing back their expectations on a return to normal. Nearly half now think that won't come until 2022 or later.

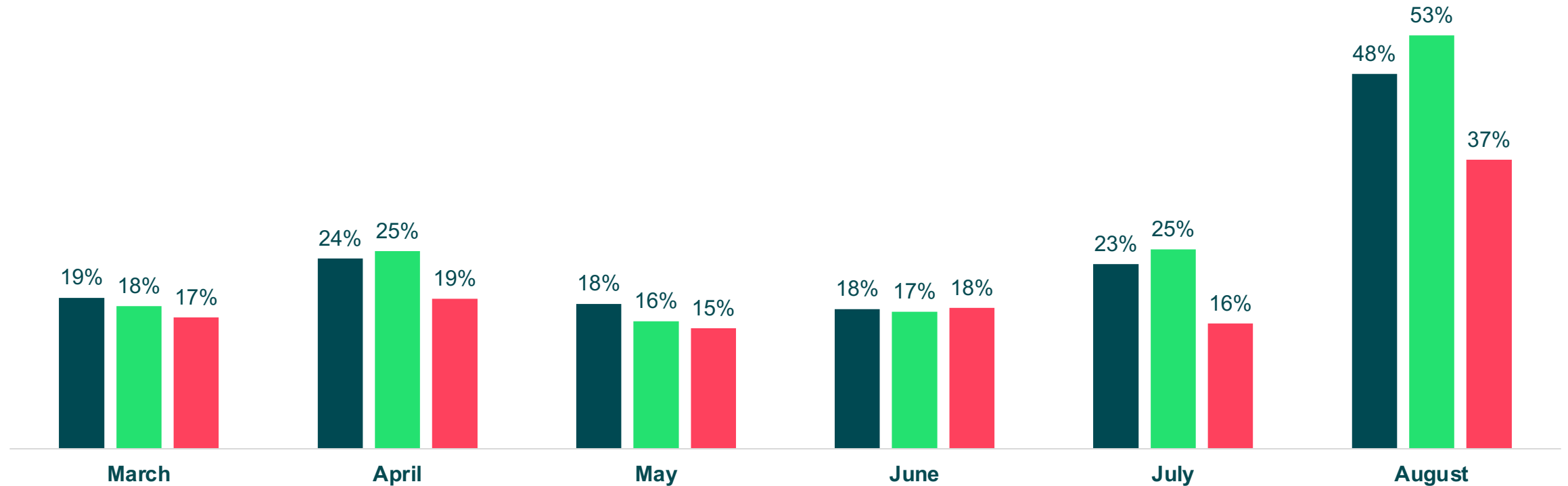


When do you expect to be able to return to normal activities & behaviors?
Numerator Monthly COVID-19 Sentiment Survey

Those expecting a return to normal in 2022 or later more than doubled in August across all shopper groups, and is highest among those vaccinated.

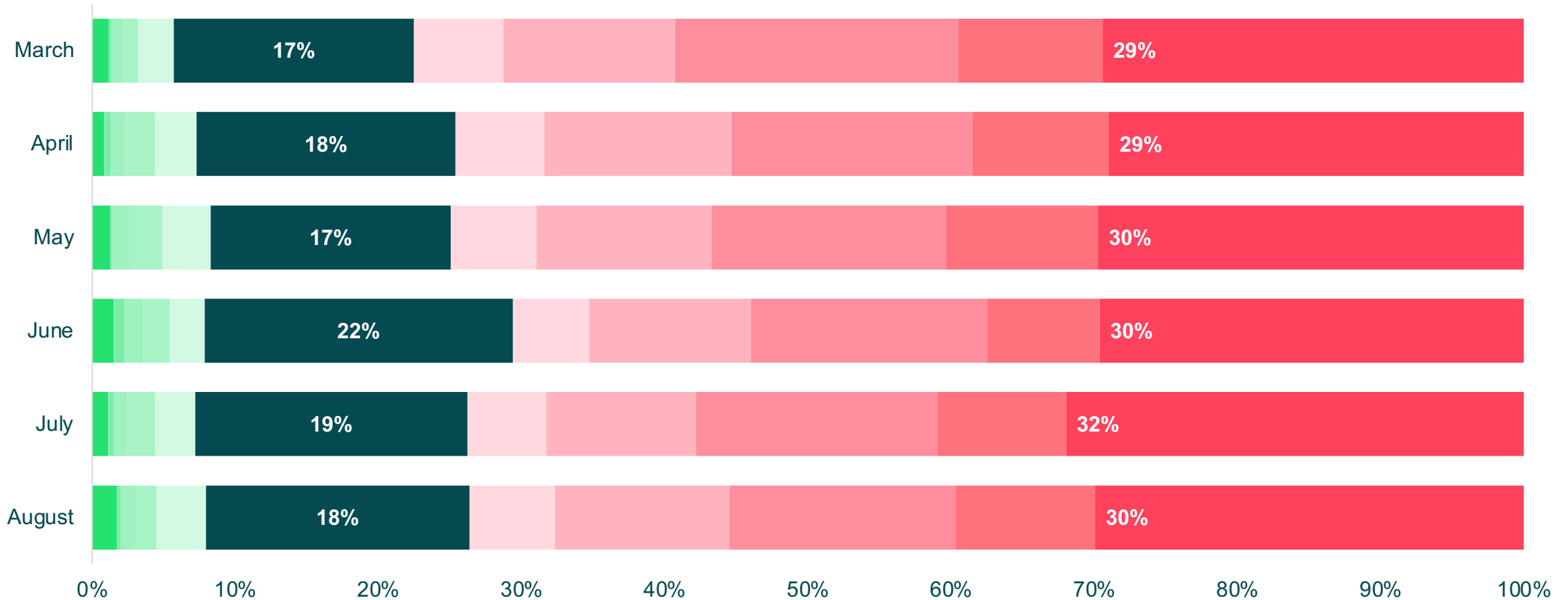
% of Shoppers Who Don't think "Normal" Will Come until 2022 or Later

■ All Shoppers ■ Vaccinated Shoppers ■ Shoppers Who Who't Get Vaccine



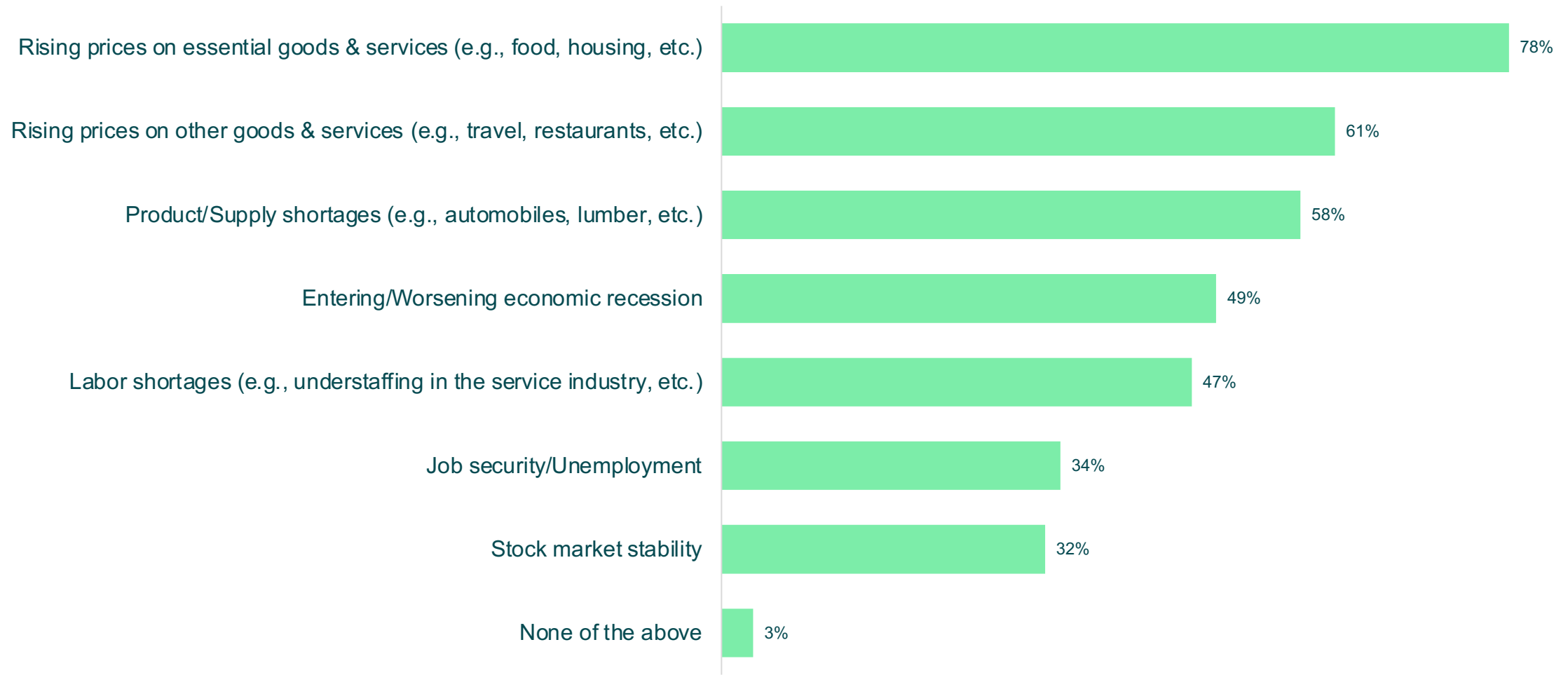
Economic Spotlight: The overall level of economic concern remains elevated and steady in August versus prior months.

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



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

Economic Spotlight: Economic concerns center around inflation—with rising prices on goods and services— and product shortages.



Want to **know more?**

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

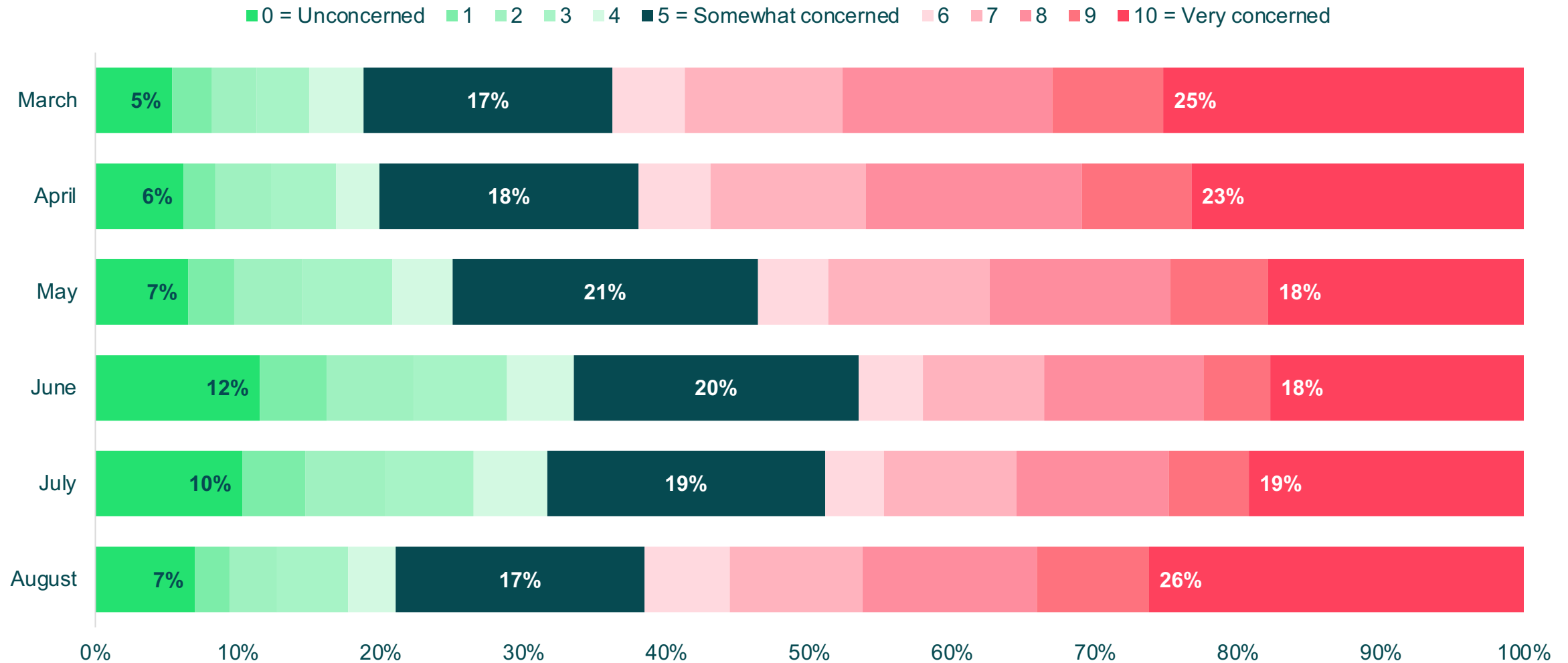
numerator.com/coronavirus/consumer-sentiment



Appendix: All COVID-19 Charts x Vaccine Status

COVID-19 Level of Concern

All Shoppers

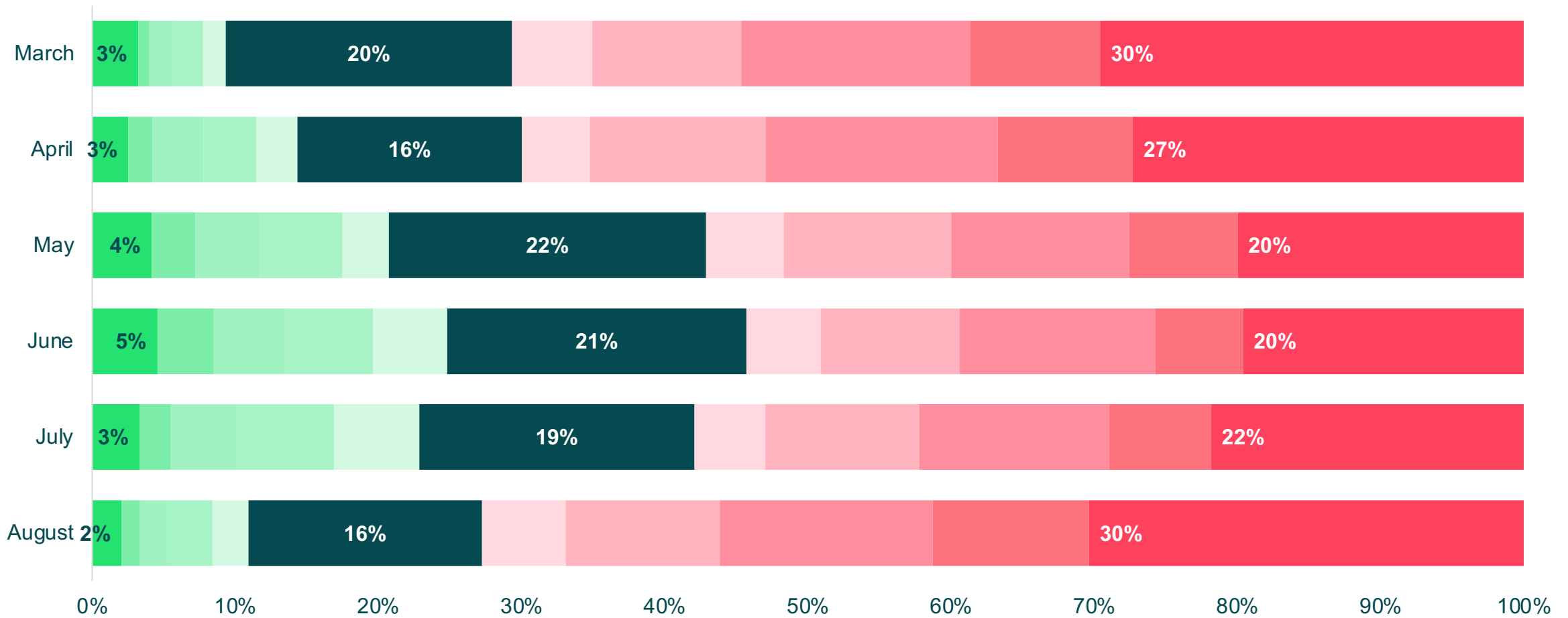


What is your level of concern regarding COVID-19?
Numerator Monthly COVID-19 Sentiment Survey

COVID-19 Level of Concern

Vaccinated Shoppers

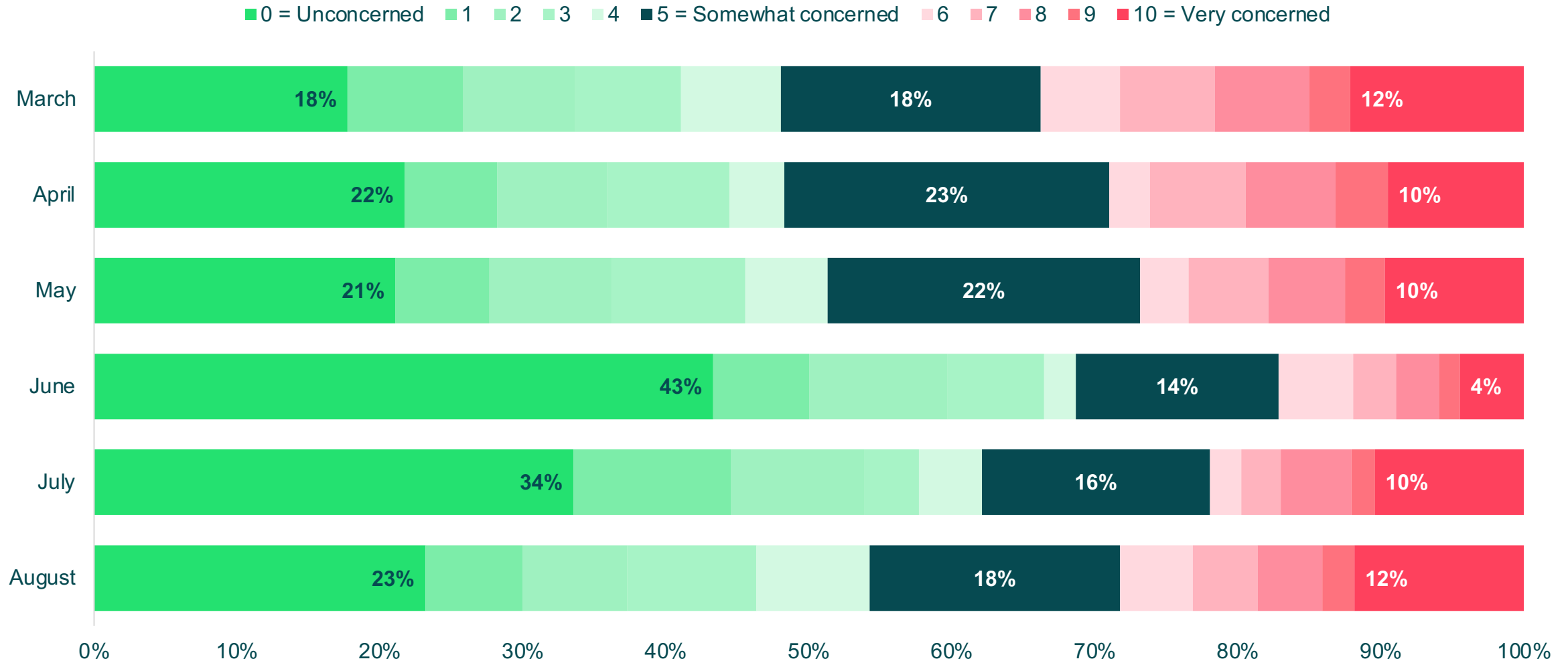
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What is your level of concern regarding COVID-19?
 Numerator Monthly COVID-19 Sentiment Survey

COVID-19 Level of Concern

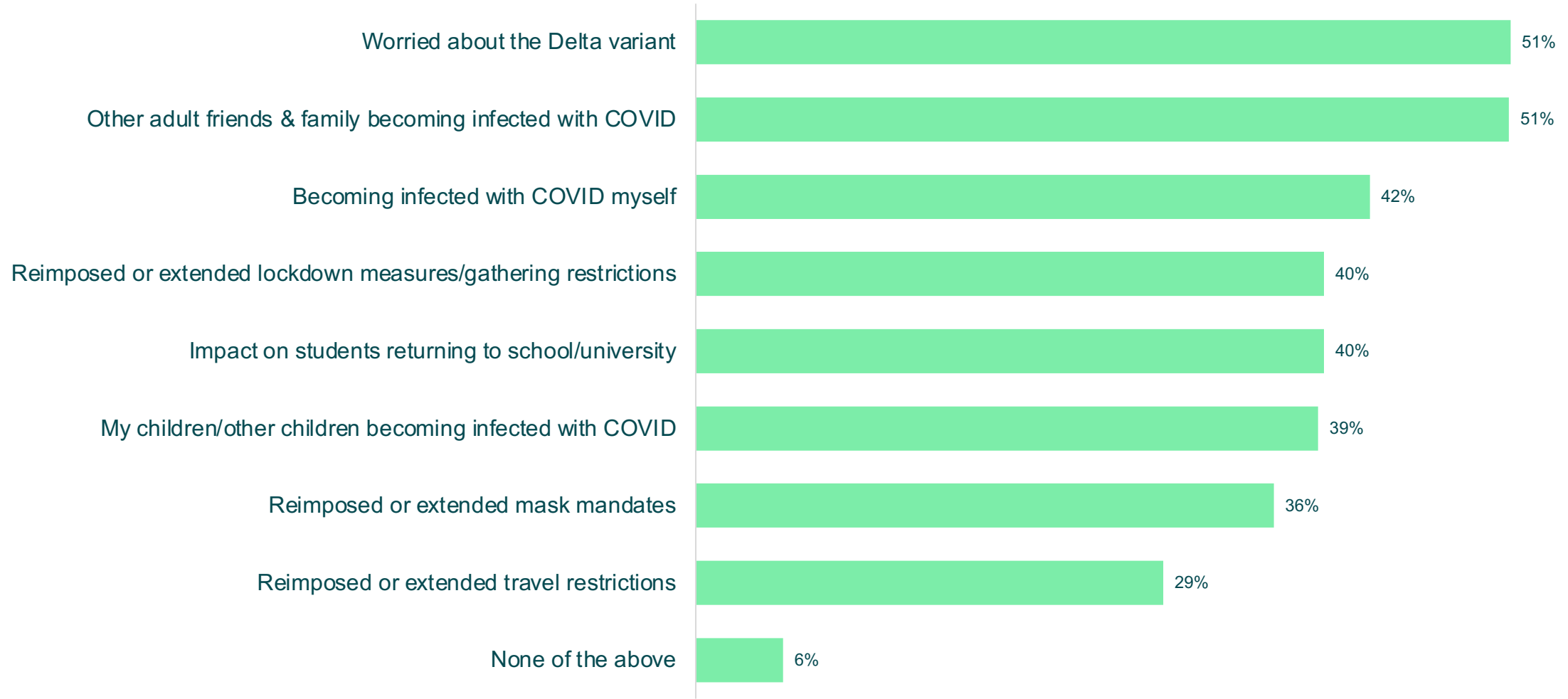
Shoppers Who Won't Get Vaccine



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

Specific COVID-19 Concerns

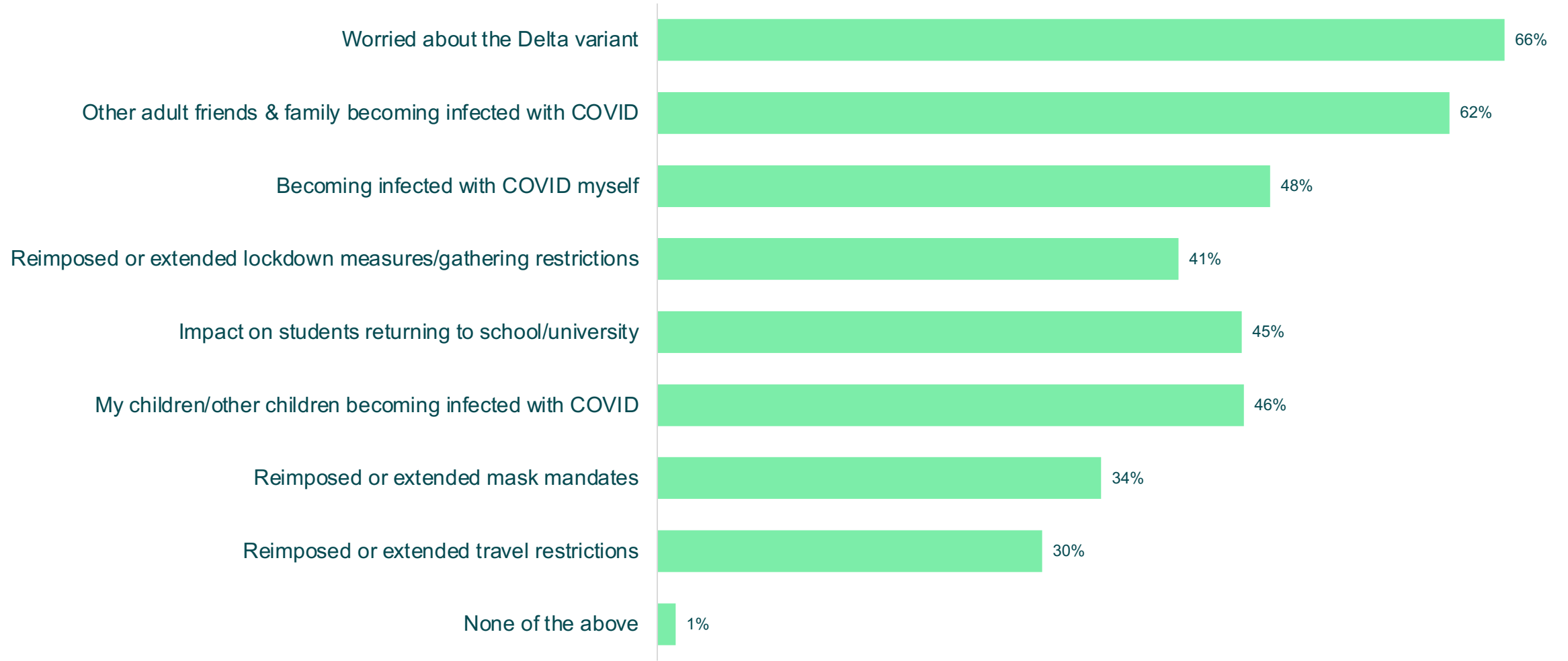
All Shoppers (August 2021)



What specific concerns do you have regarding COVID-19?
Numerator Monthly COVID-19 Sentiment Survey

Specific COVID-19 Concerns

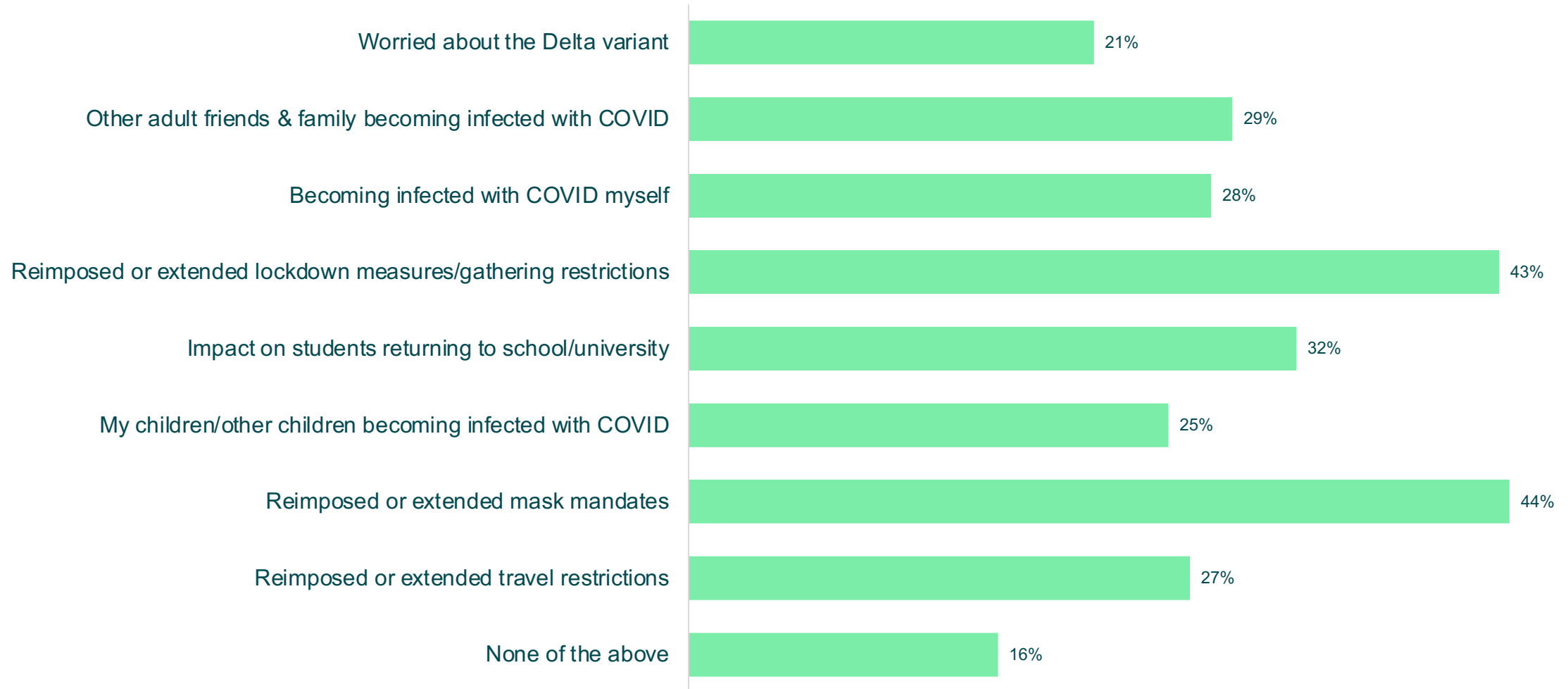
Vaccinated Shoppers (August 2021)



What specific concerns do you have regarding COVID-19?
Numerator Monthly COVID-19 Sentiment Survey

Specific COVID-19 Concerns

Shoppers Who Won't Get Vaccine (August 2021)

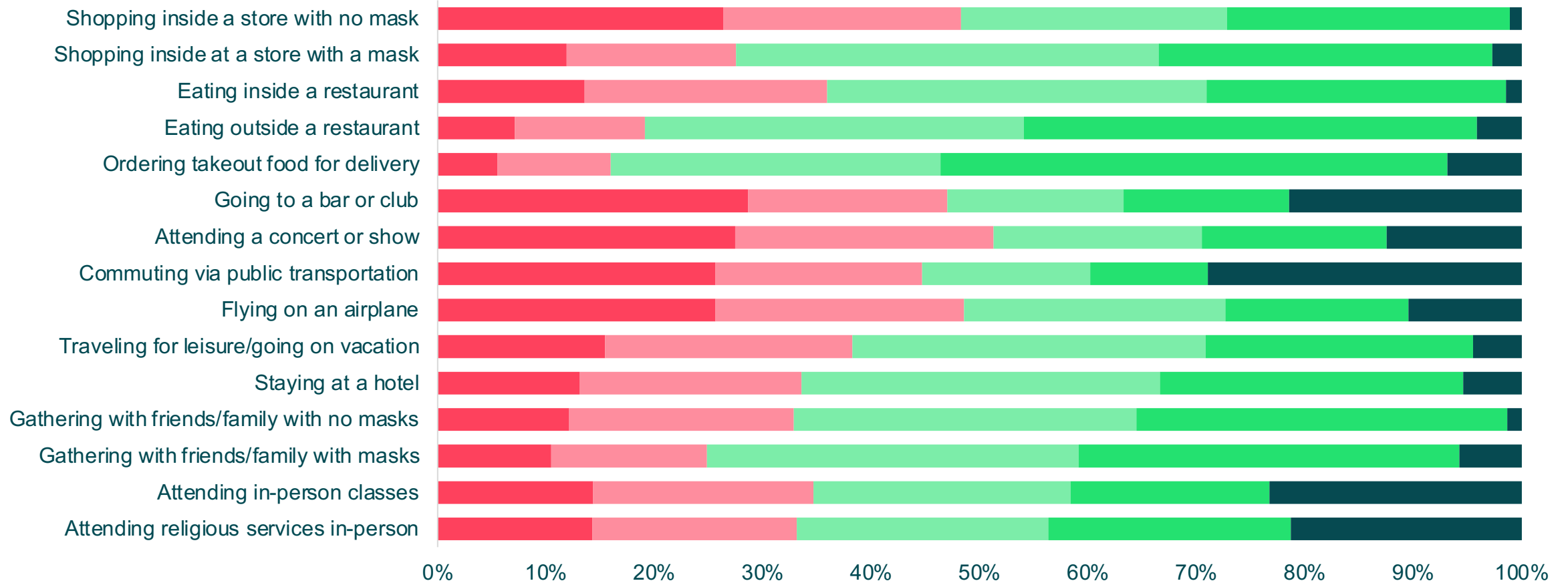


What specific concerns do you have regarding COVID-19?
Numerator Monthly COVID-19 Sentiment Survey

Consumer Comfort Levels

All Shoppers (August 2021)

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

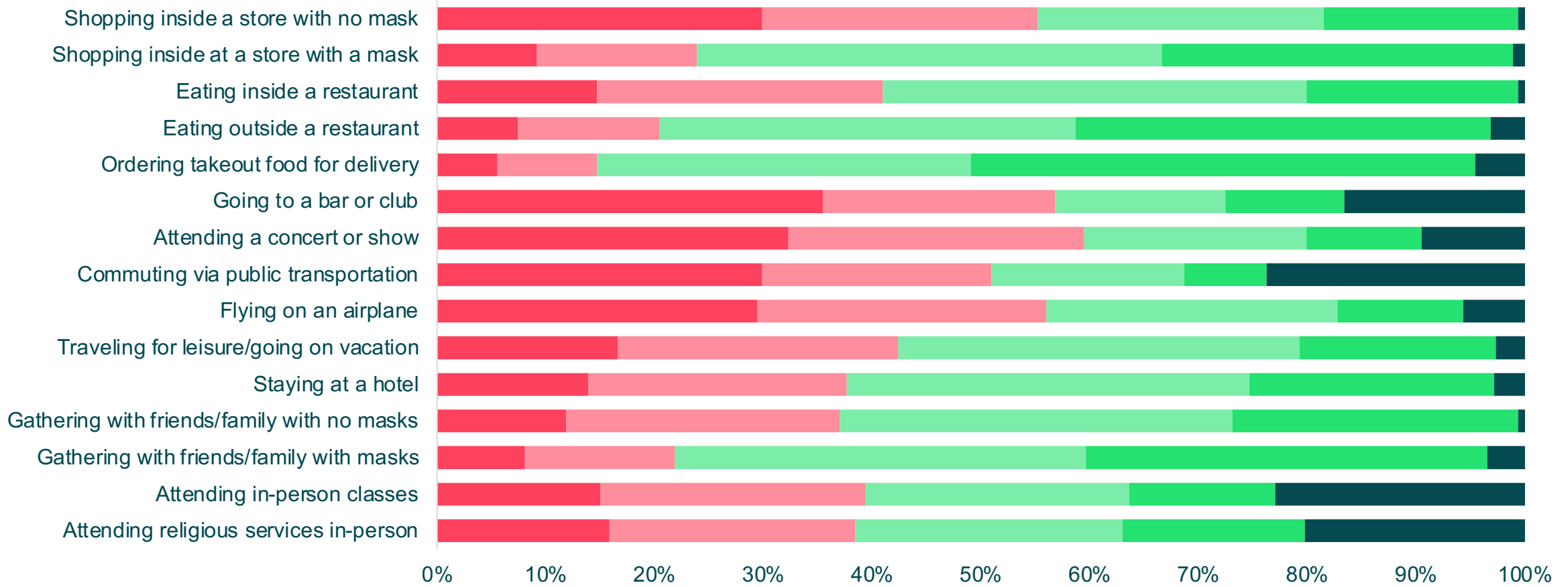


What is your current comfort level personally engaging in these activities/behaviors?
 Numerator Monthly COVID-19 Sentiment Survey

Consumer Comfort Levels

Vaccinated Shoppers (August 2021)

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

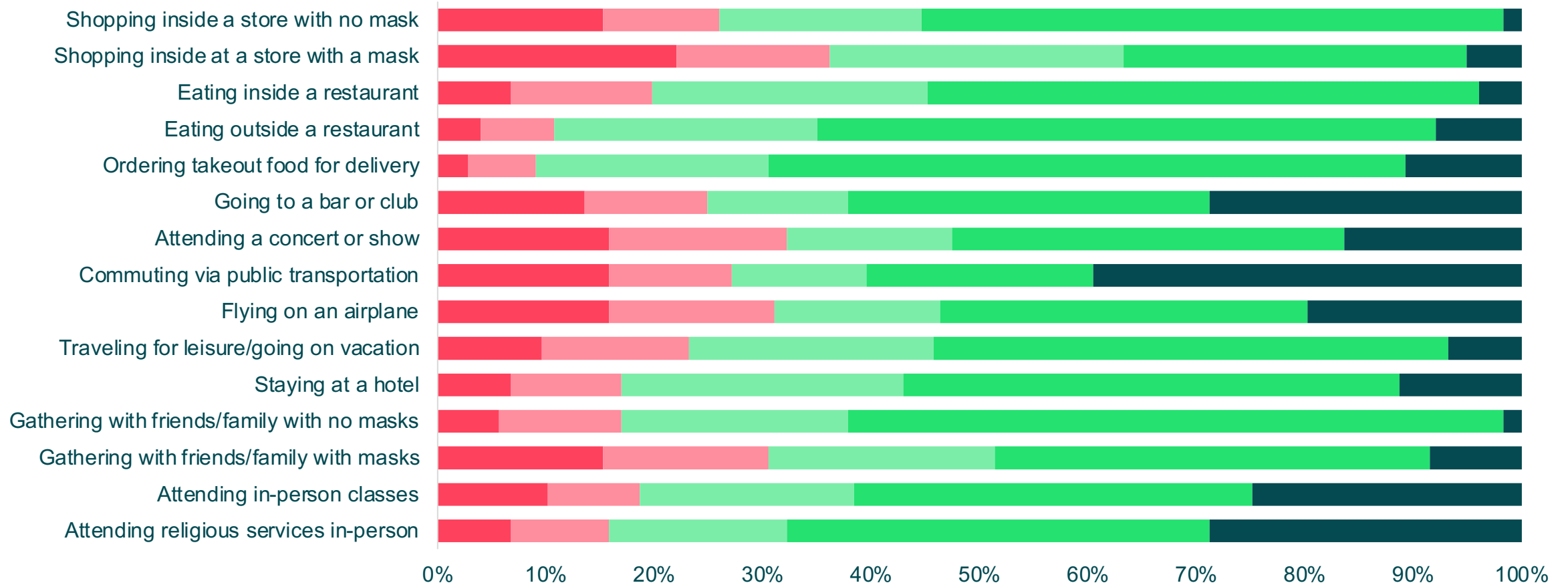


What is your current comfort level personally engaging in these activities/behaviors?
 Numerator Monthly COVID-19 Sentiment Survey

Consumer Comfort Levels

Shoppers Who Won't Get Vaccine (August 2021)

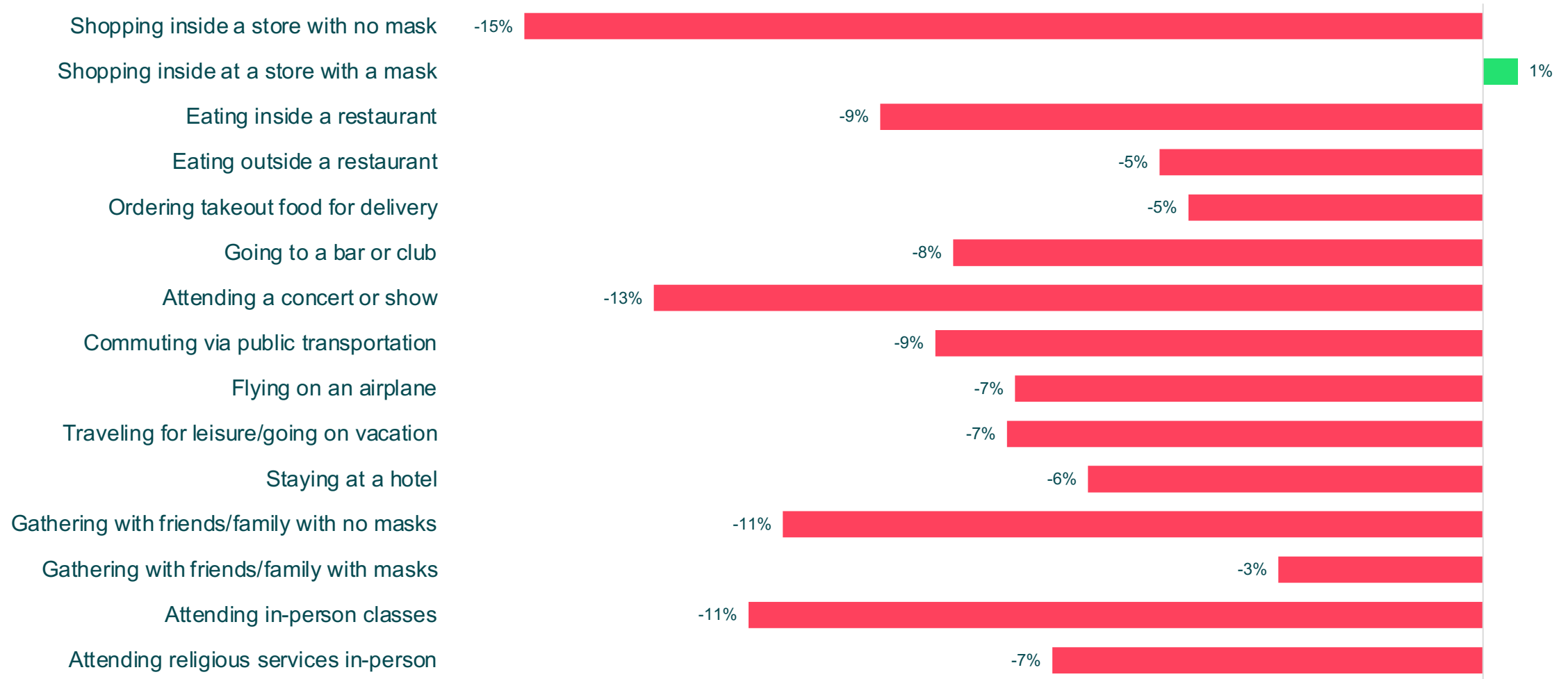
■ Extremely uncomfortable
 ■ Somewhat uncomfortable
 ■ Somewhat comfortable
 ■ Extremely comfortable
 ■ Not applicable – this isn't something I ever do regardless of COVID



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

Change in Consumer Comfort Levels

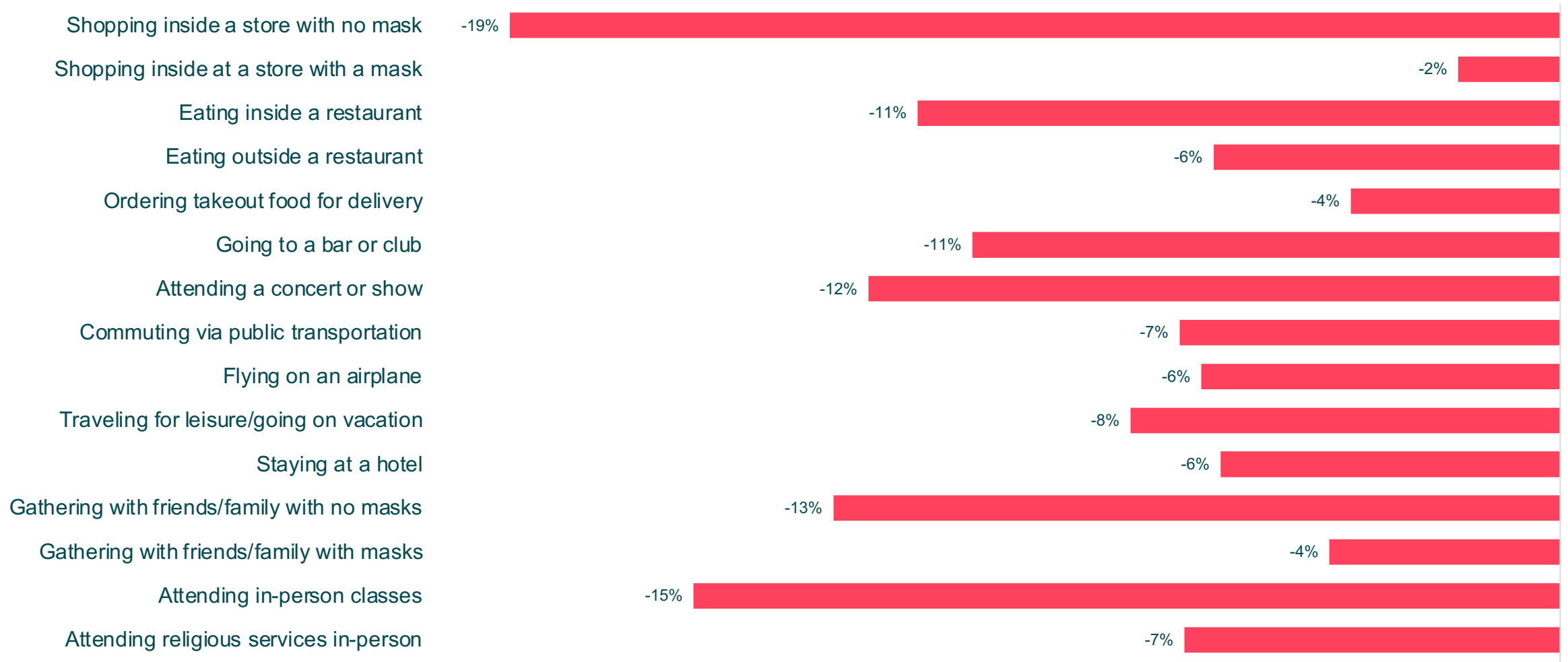
All Shoppers (August vs. July 2021)



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

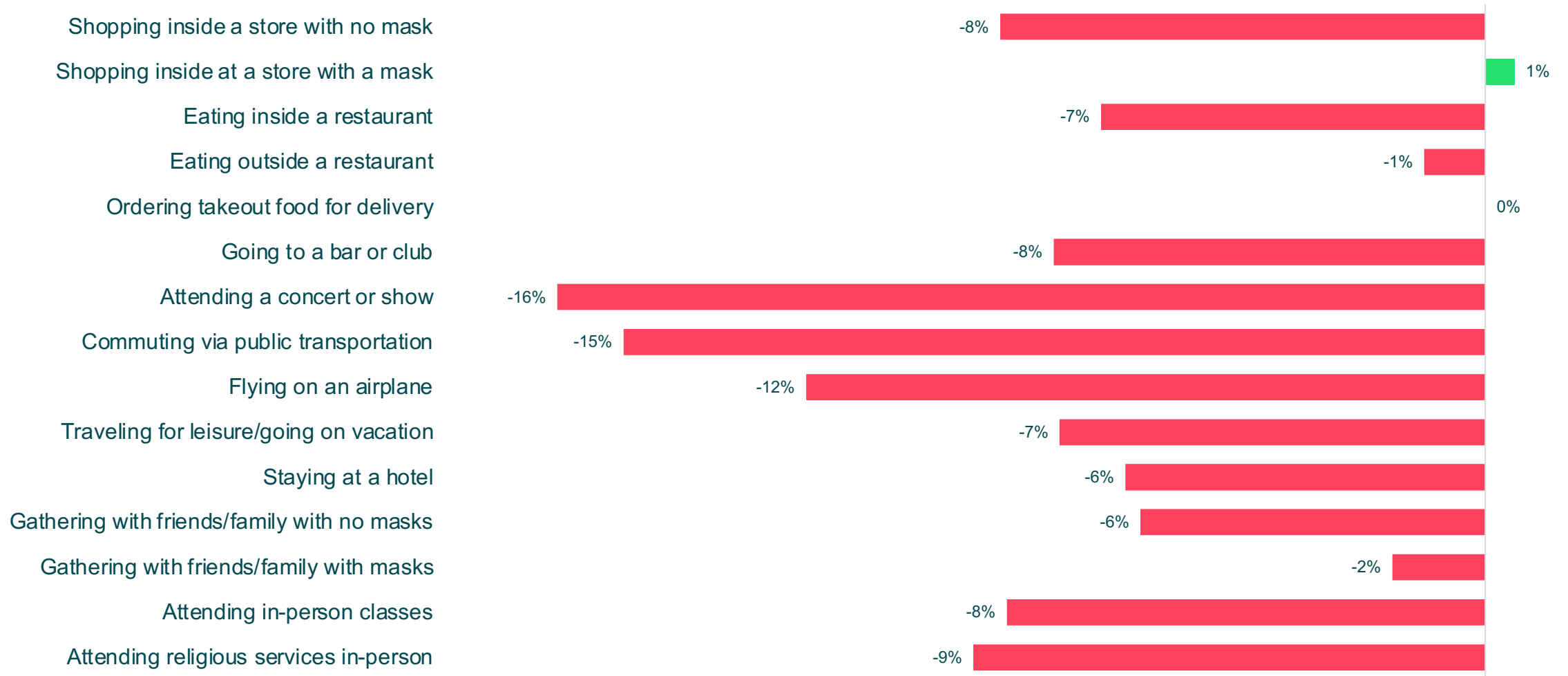
Vaccinated Shoppers (August vs. July 2021)



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

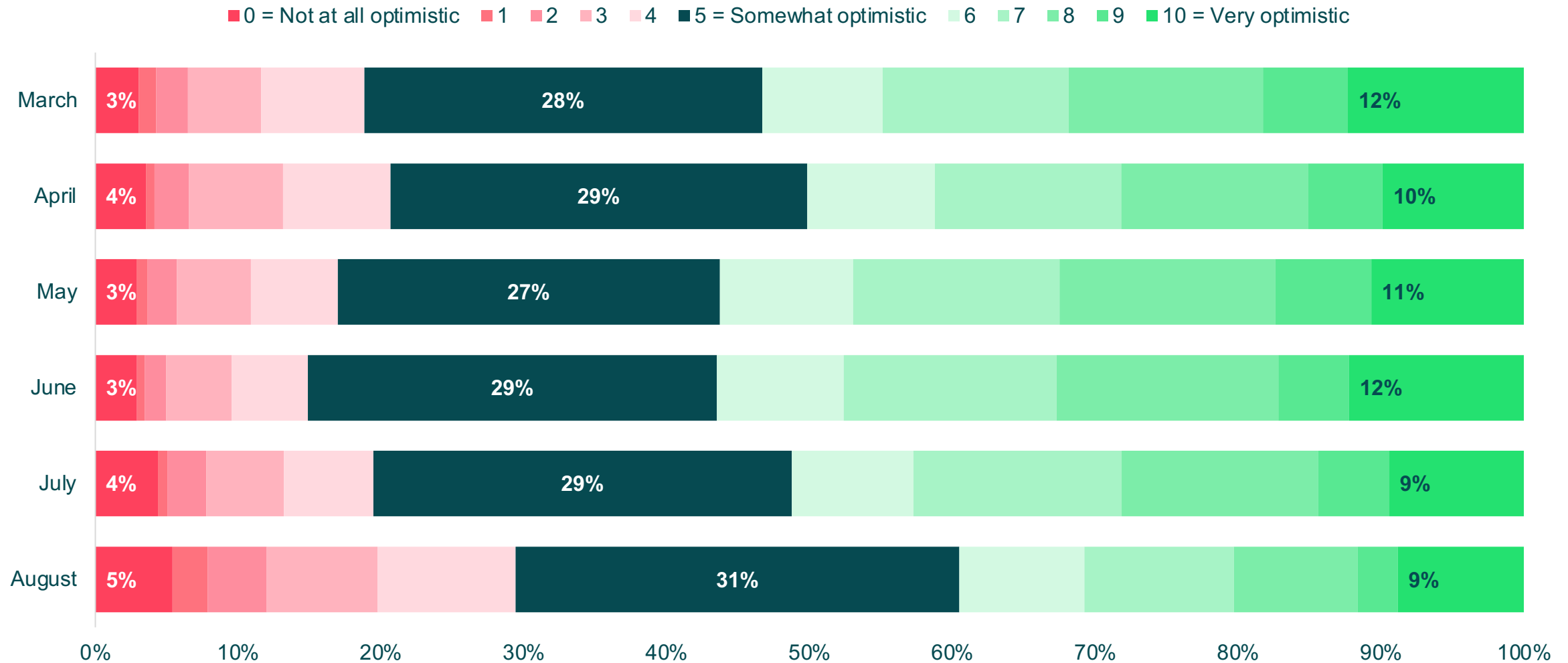
Shoppers Who Won't Get Vaccine (August vs. July 2021)



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

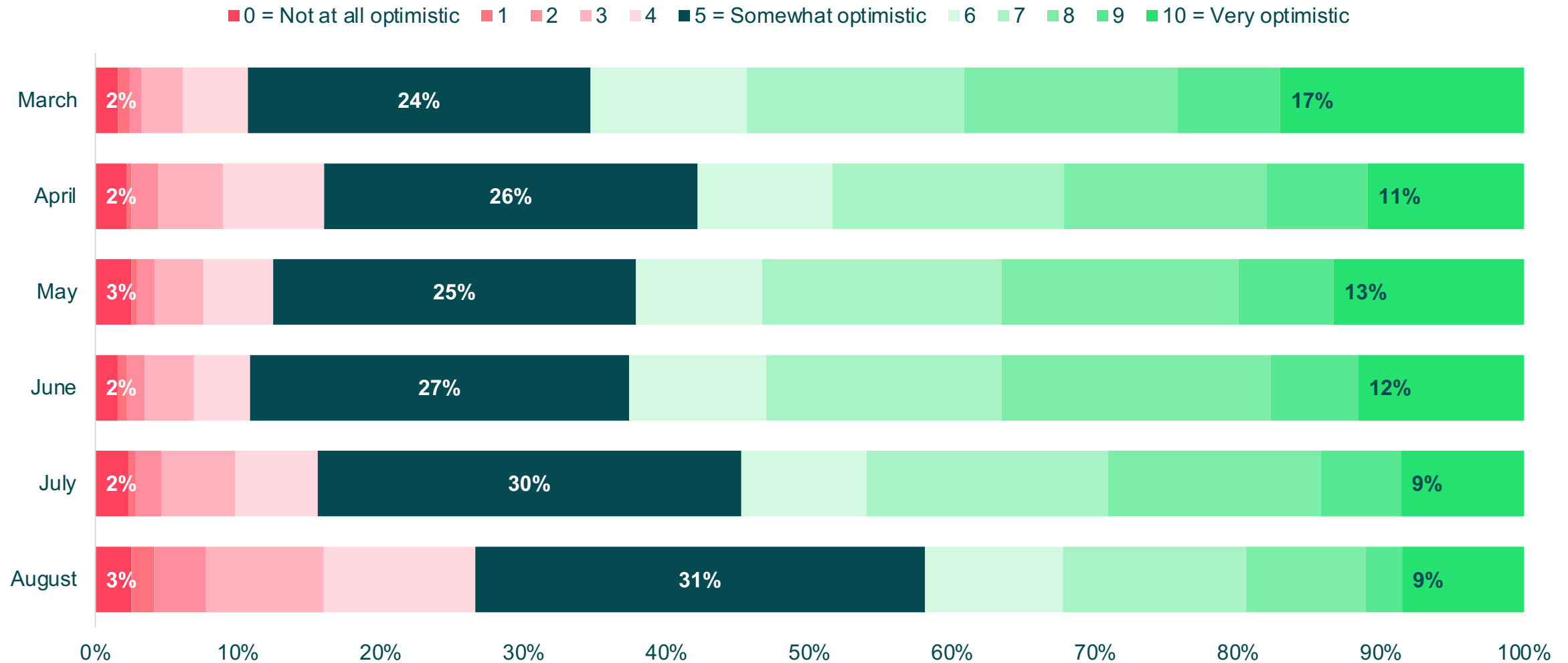
All Shoppers



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

Optimism for Return to Normal

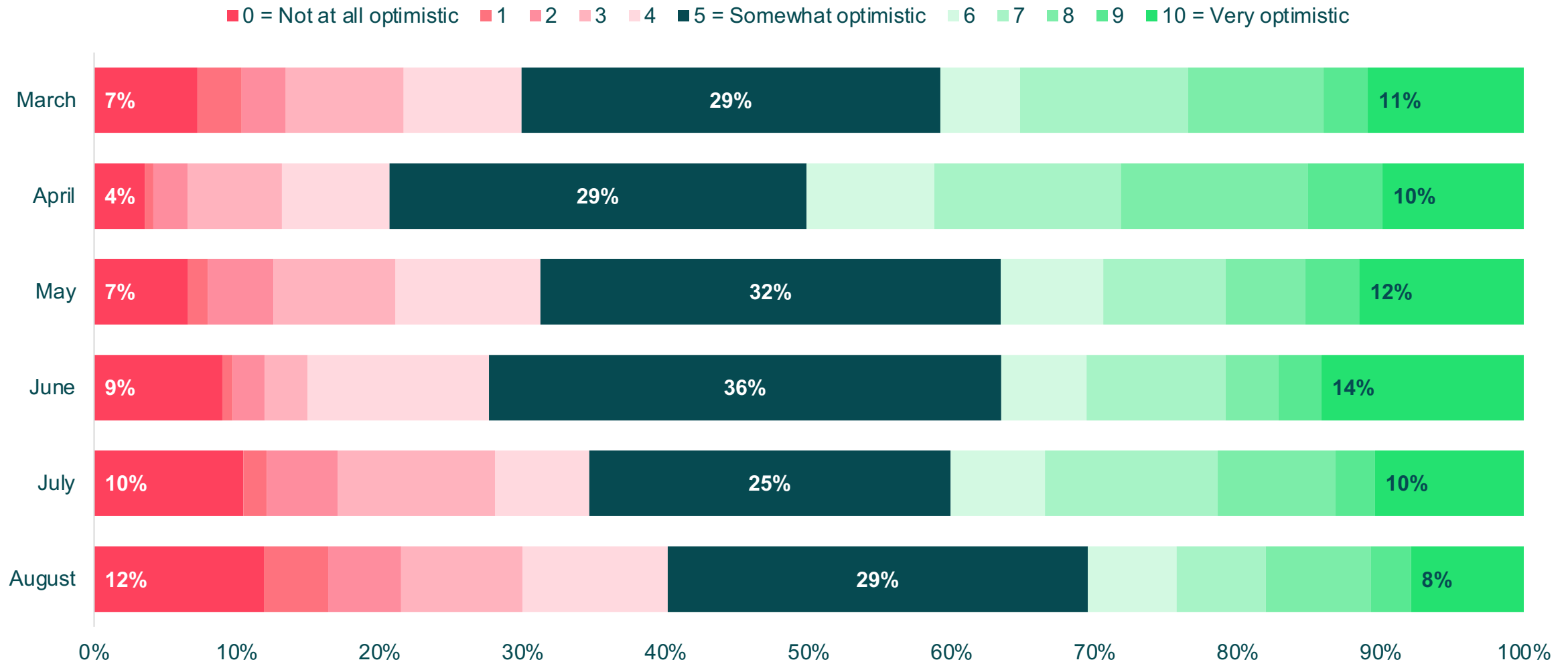
Vaccinated Shoppers



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

Optimism for Return to Normal

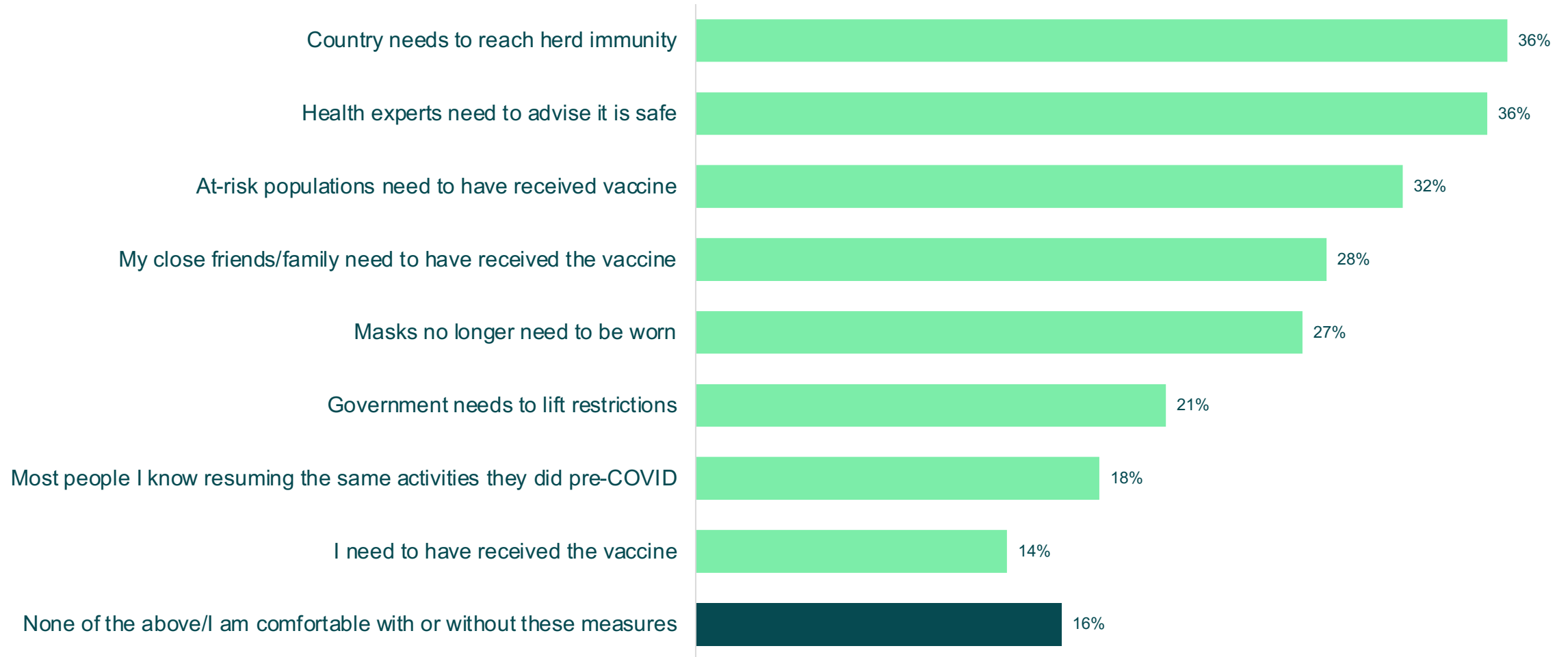
Shoppers Who Won't Get Vaccine



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

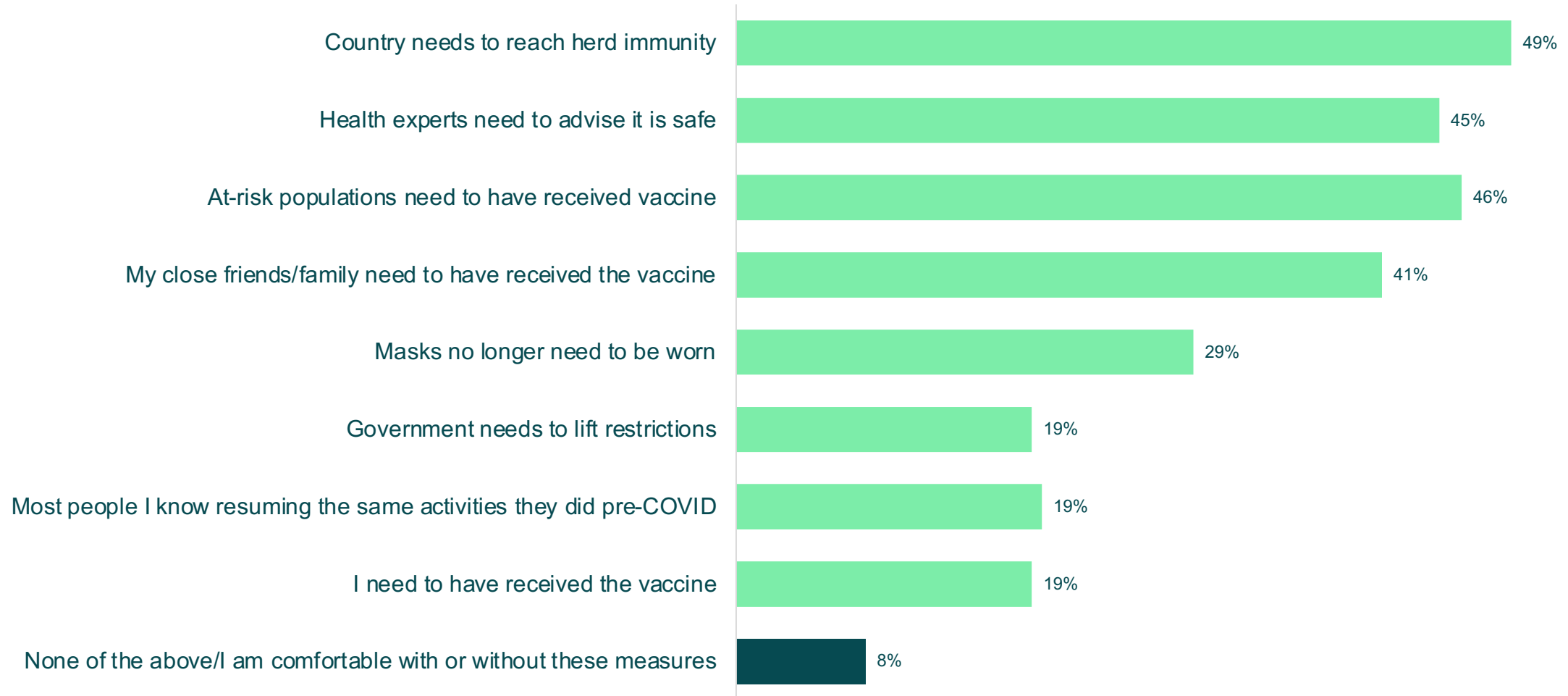
Necessities for Normal

All Shoppers (August 2021)

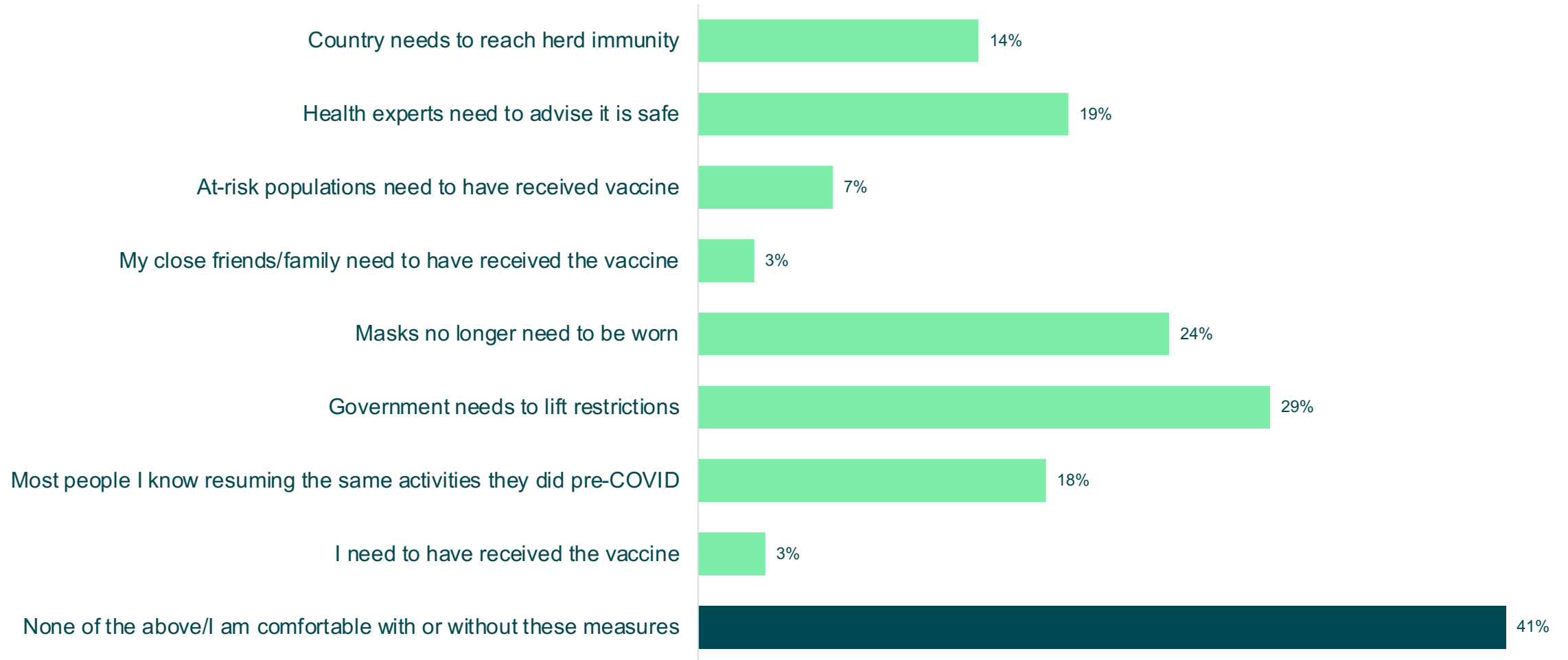


What will need to happen in order for you to feel comfortable resuming activities/behaviors you did prior to COVID?
Numerator Monthly COVID-19 Sentiment Survey

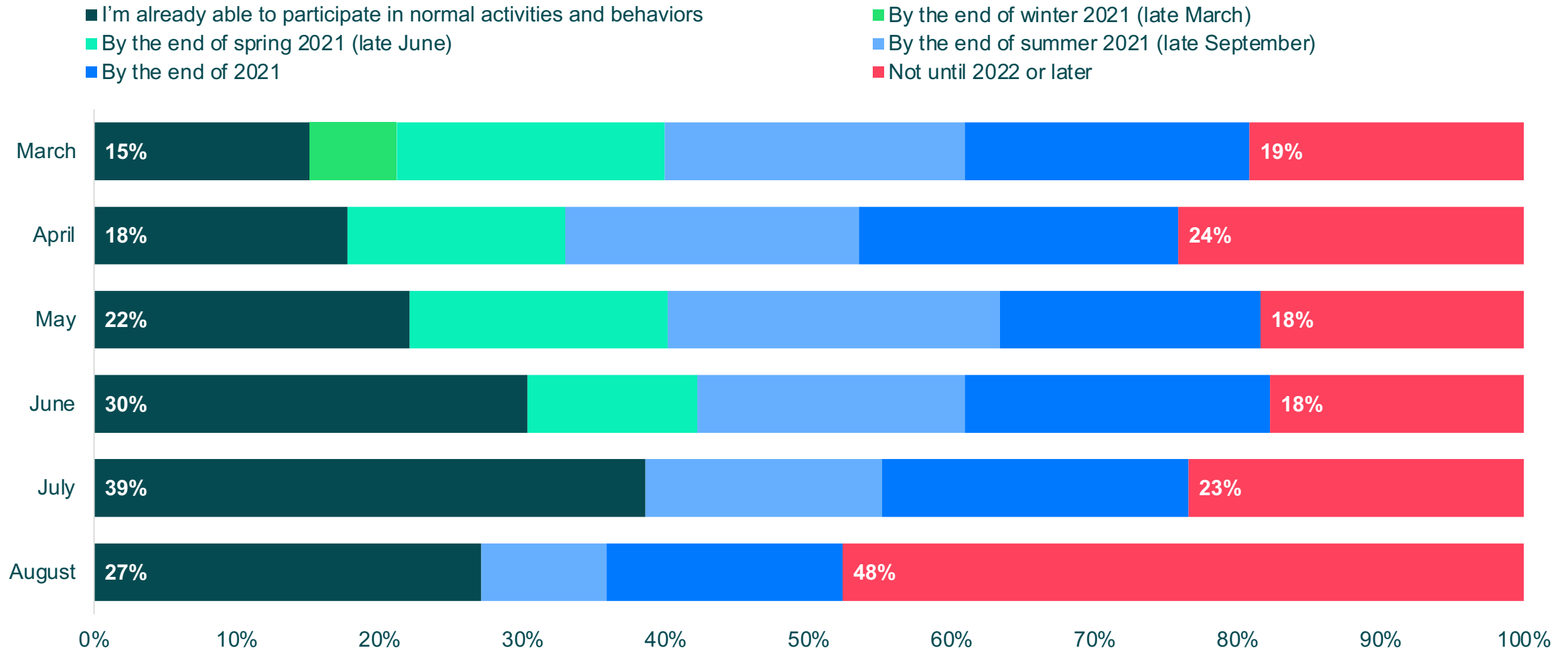
Necessities for Normal Vaccinated Shoppers (August 2021)



Necessities for Normal Shoppers Who Won't Get Vaccine (August 2021)

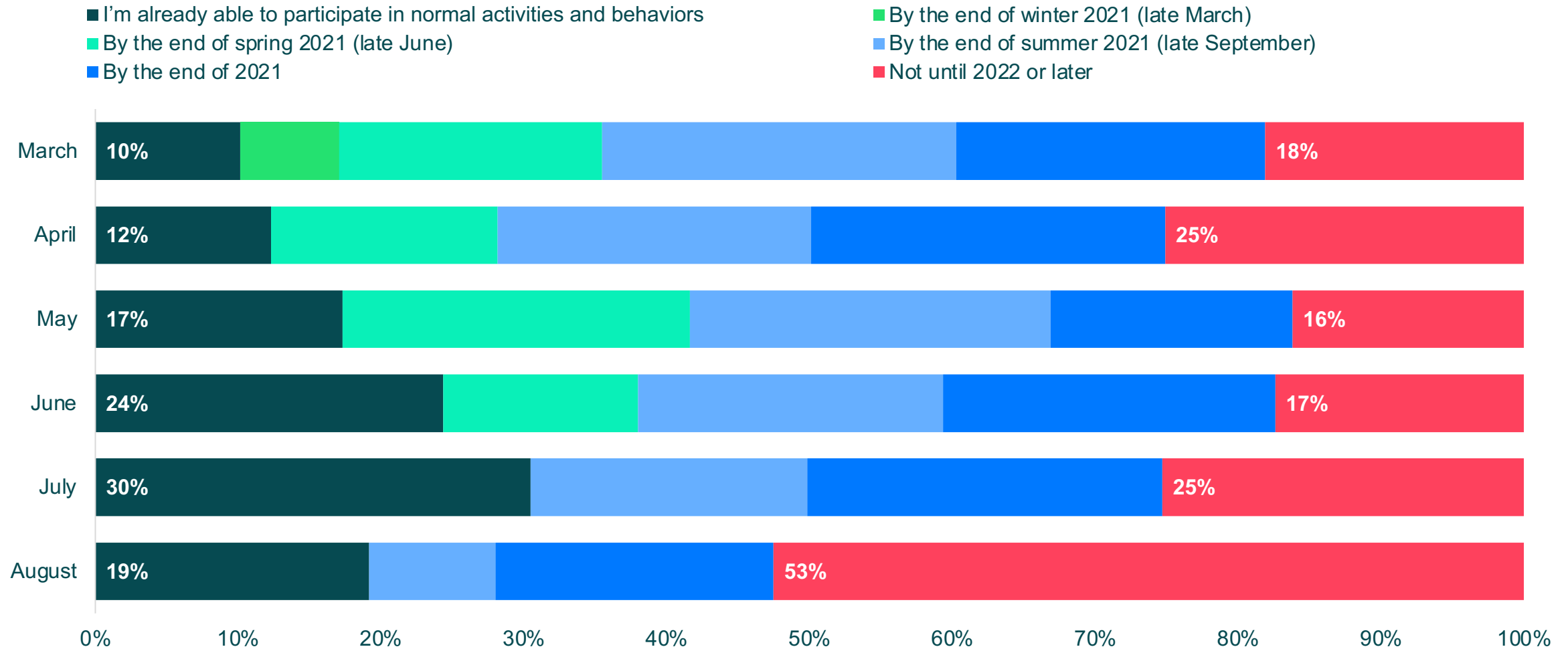


Timing Expectations for Normal All Shoppers



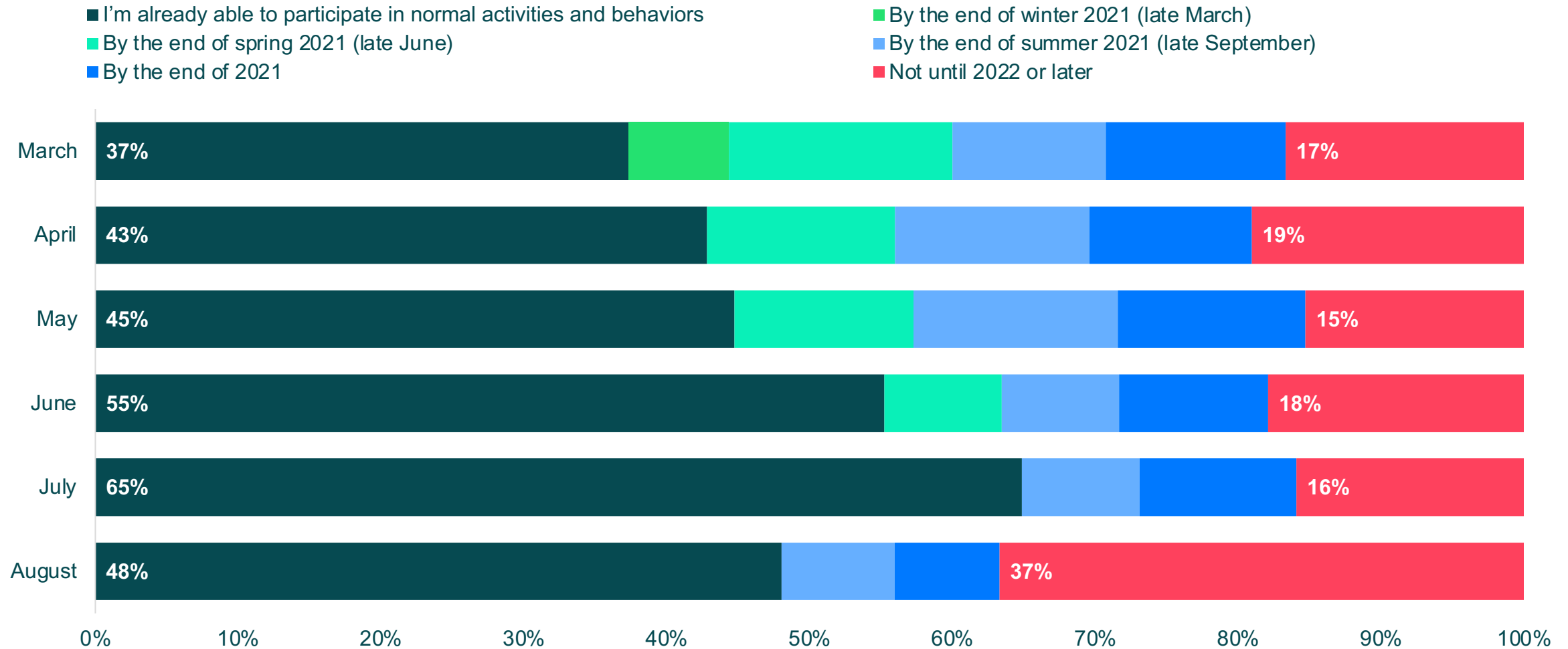
When do you expect to be able to return to normal activities & behaviors?
Numerator Monthly COVID-19 Sentiment Survey

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

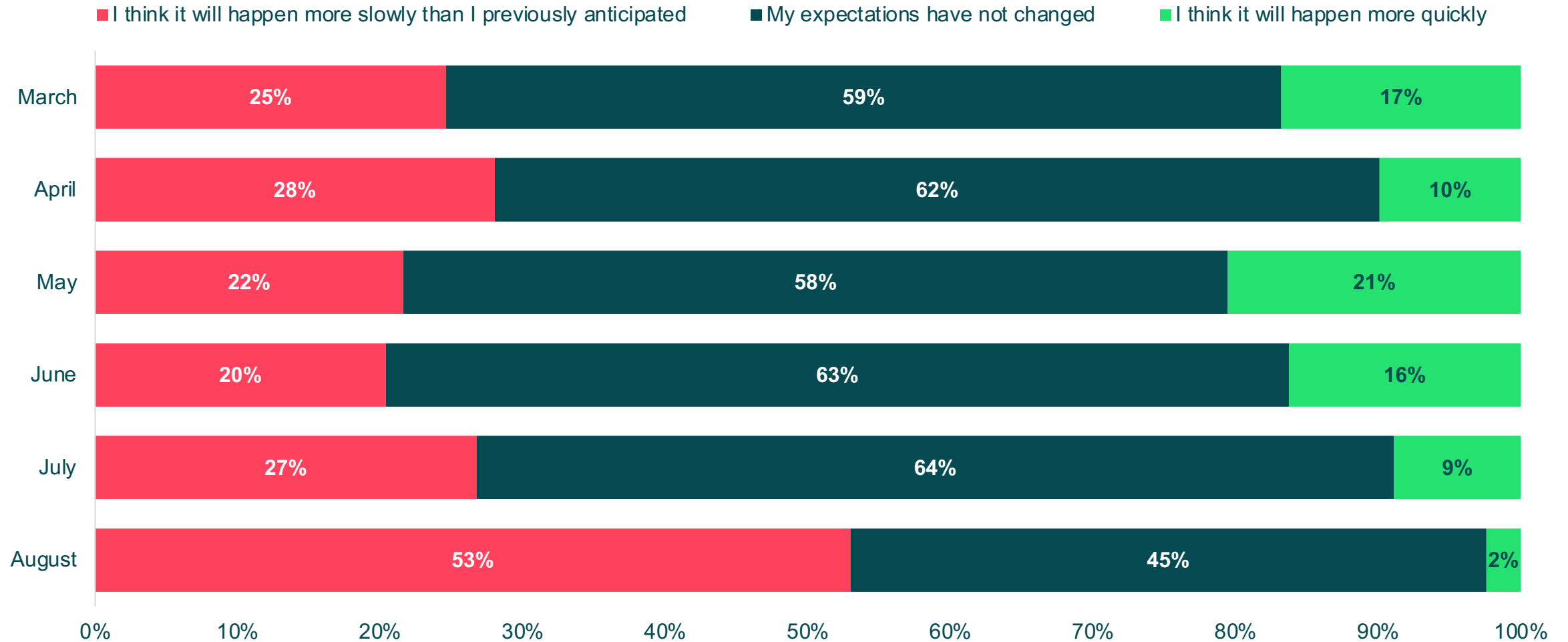
Timing Expectations for Normal Shoppers Who Won't Get Vaccine



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

Change in Timing Expectations

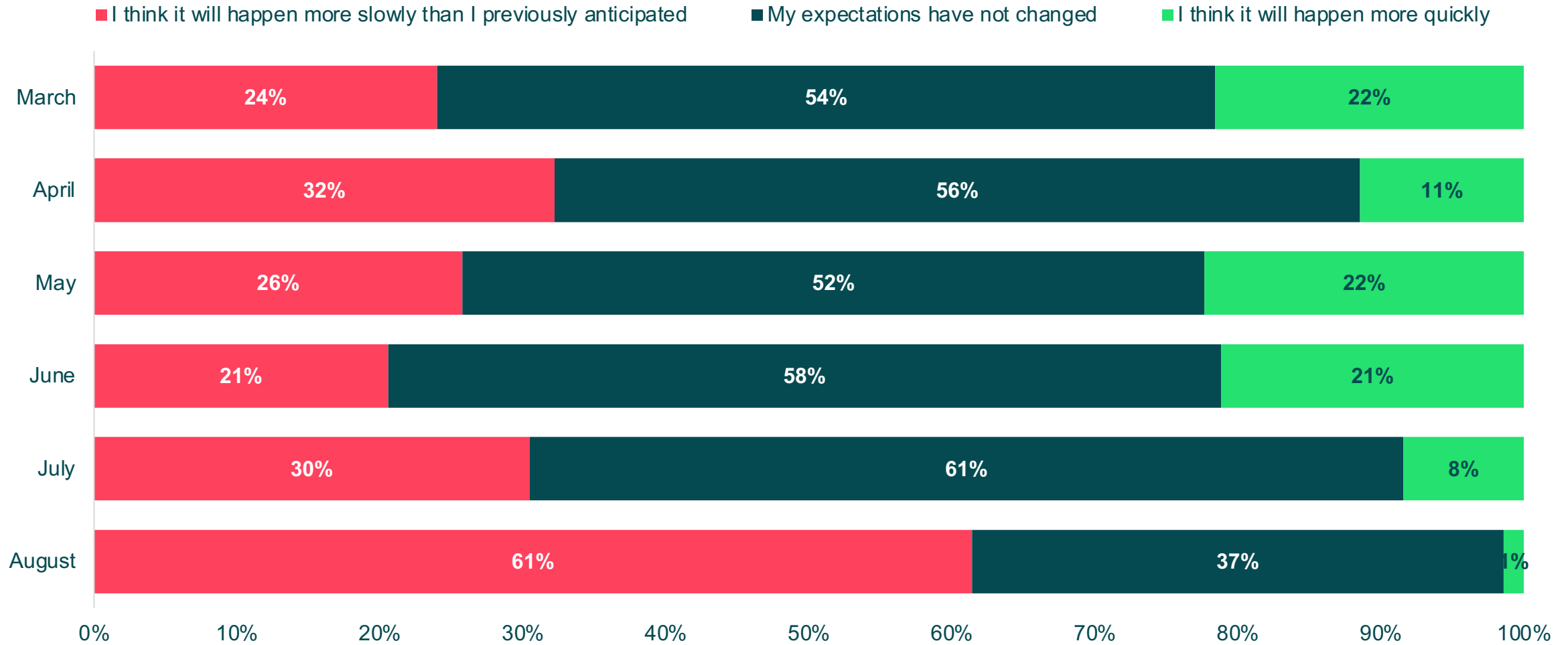
All Shoppers



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

Change in Timing Expectations

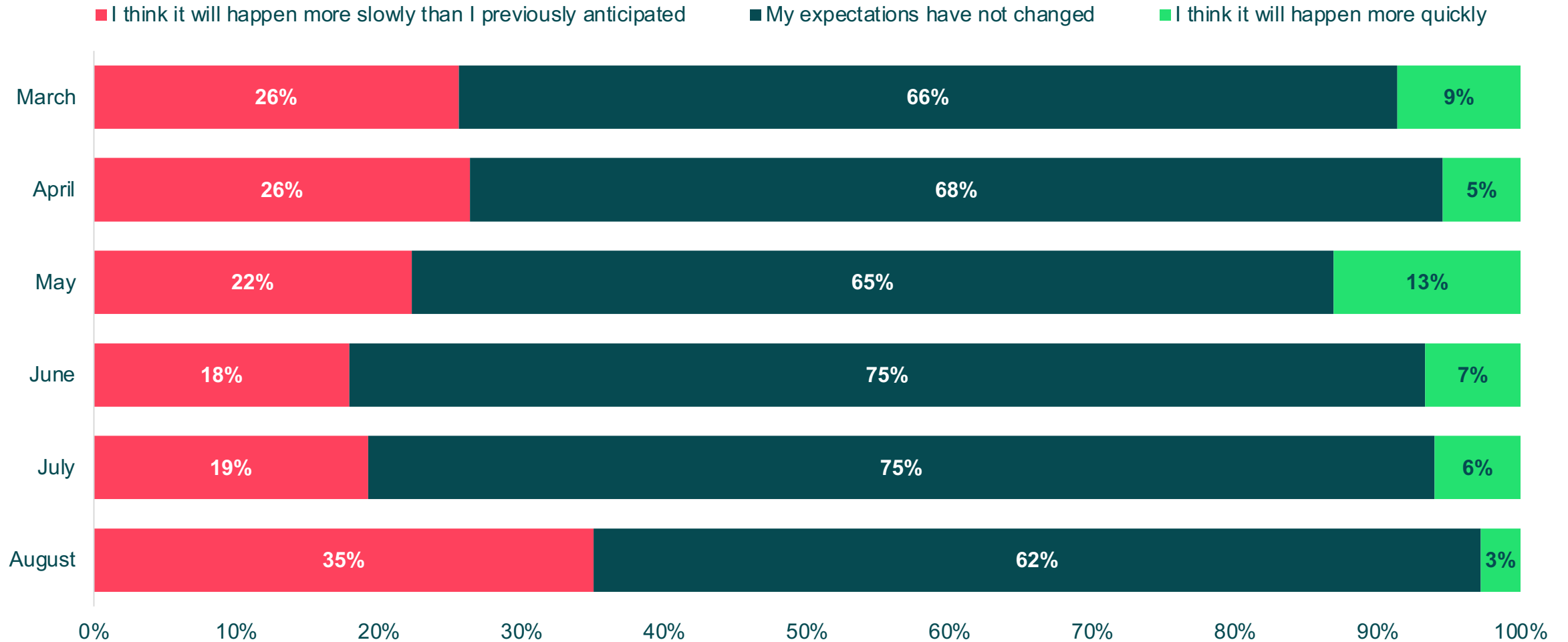
Vaccinated Shoppers



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