



What We're Seeing®: Beyond Quarantine

The Macro Trends That Will Shape Post-COVID America



April 9, 2021

Everything Affects Everything

Everything is Constantly Changing

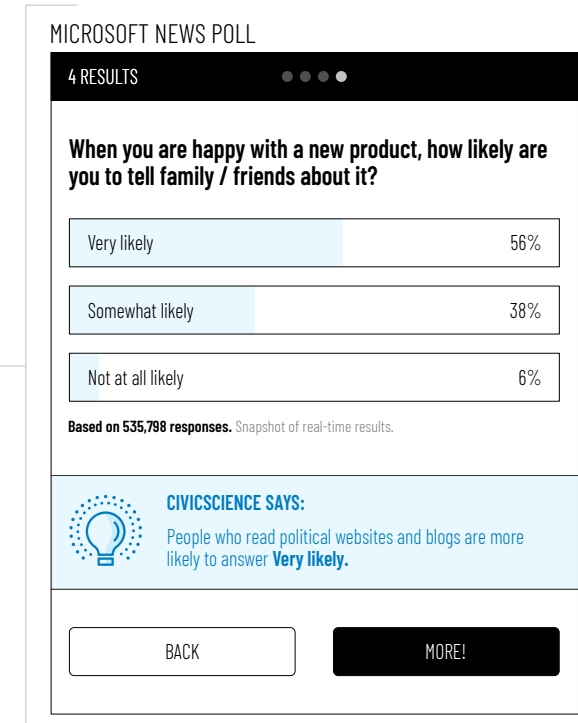
We Study Everything. Constantly.



CivicScience conducts **large representative surveys of US consumers every day** through polling applications embedded in the content of a vast, demographically and geographically diverse network of partner websites. Respondents answer voluntarily without compensation, mitigating the psychographic biases that plague prevailing survey panel methods.

- ✓ >100 Million profiled respondents
- ✓ >7 Million Responses/Day
- ✓ 150,000 Topics Covered, Thousands Daily
- ✓ Historical trends and respondent longitude since 2011

ONE OF OUR MANY POLLING WIDGETS

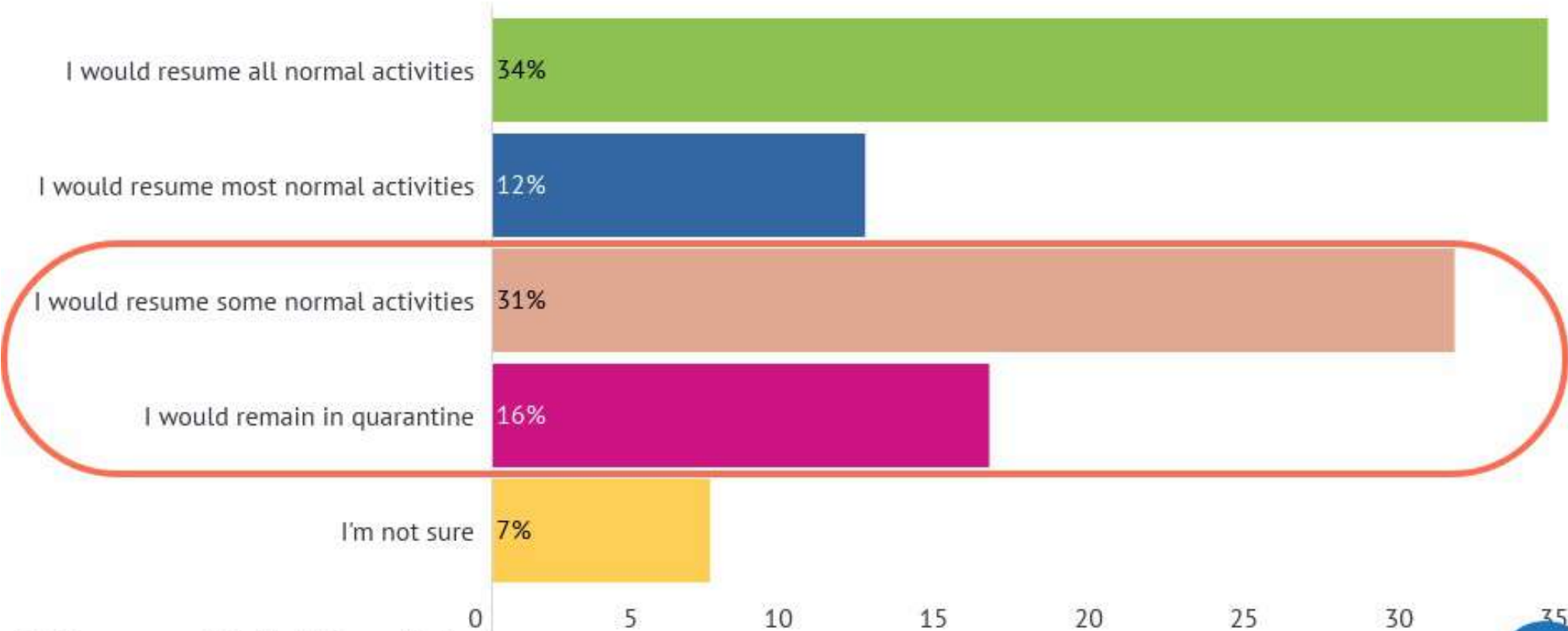


SOME OF OUR PUBLISHERS



The most important thing to remember is that **consumers – not government – **STILL have much more to say about our pace of recovery.****

If your state / local government issued a notice to go back to normal day-to-day activities in order to prevent any further negative impact on the economy, how would you respond?



16,369 responses, weighted by U.S. Census (18+)
Survey dates: Mar 7, 2021 - Apr 6, 2021
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Levels of comfort with various activities are almost **directly correlated with the size of the crowd involved.**

How soon from now would you be comfortable...?

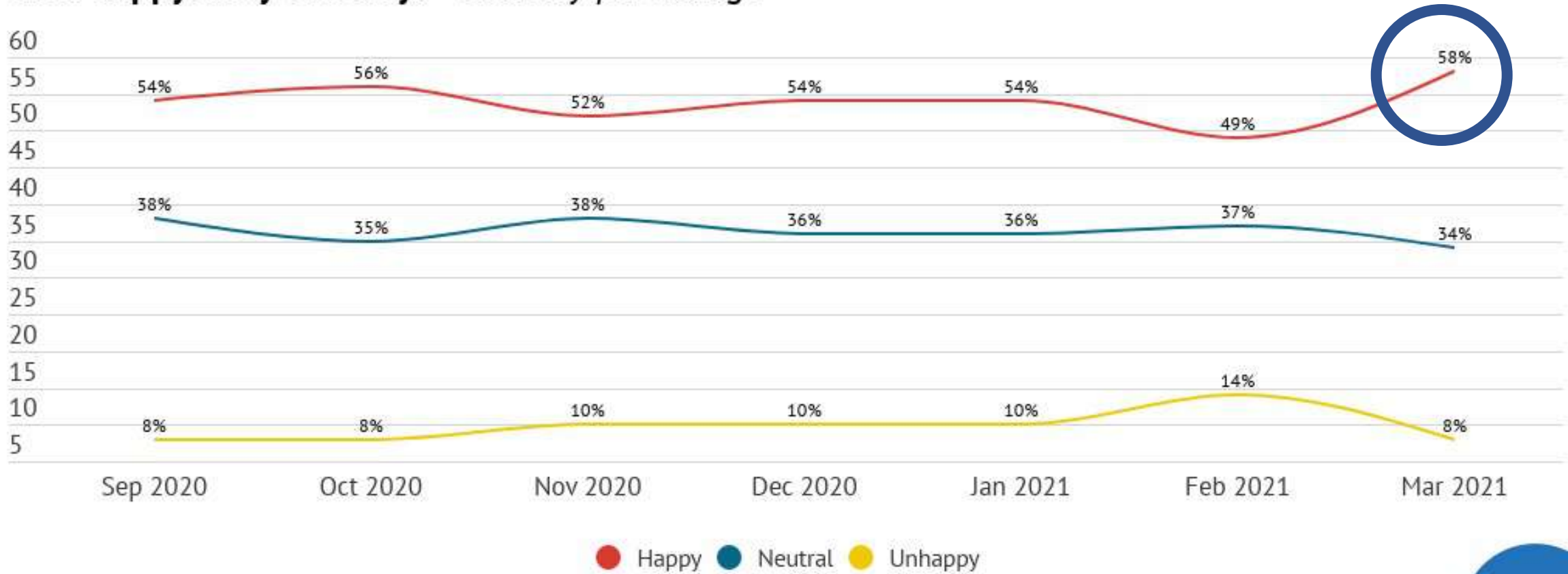


100,000+ responses weighted by U.S. Census 18+
Survey dates: Mar 8, 2021 - April 7, 2021
© CivicScience 2021



Hope springs eternal...

How happy are you today? - Monthly percentage

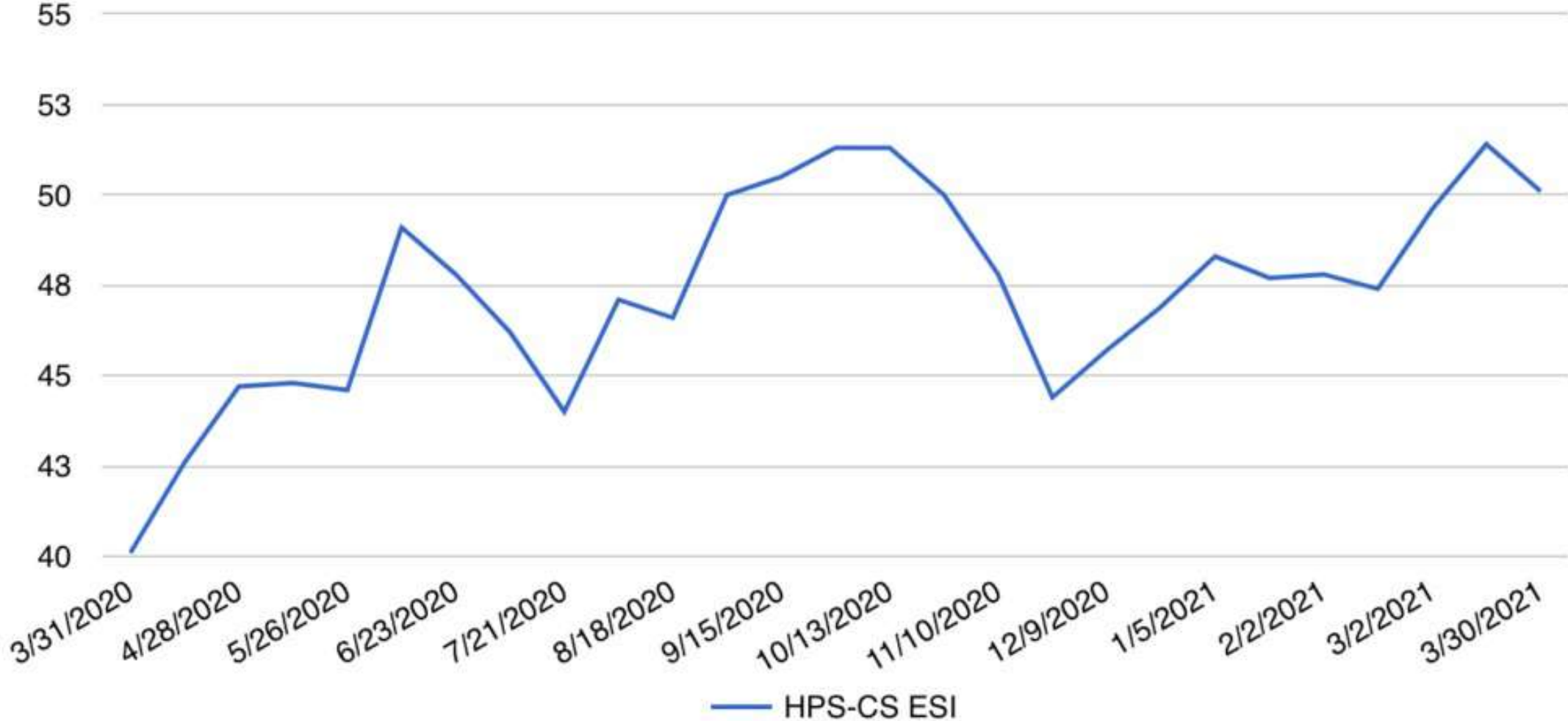


91,019 responses weighted by U.S. Census 18+
Survey dates: Sep 11, 2020 - Mar 31, 2021
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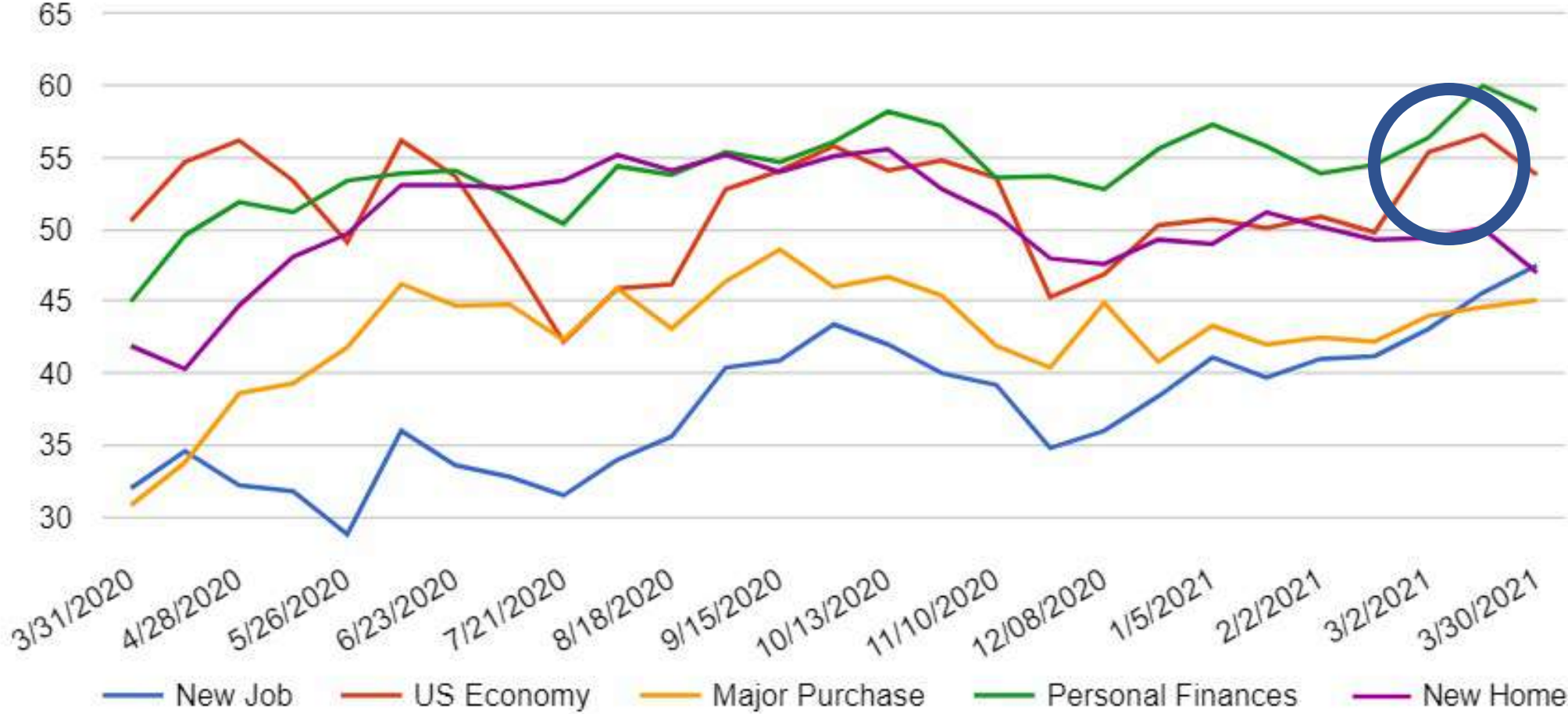
The economic mood is also pretty good right now – even though things dipped a little because of the latest case surge.

HPS-CS Economic Sentiment Index, Since March 31, 2020



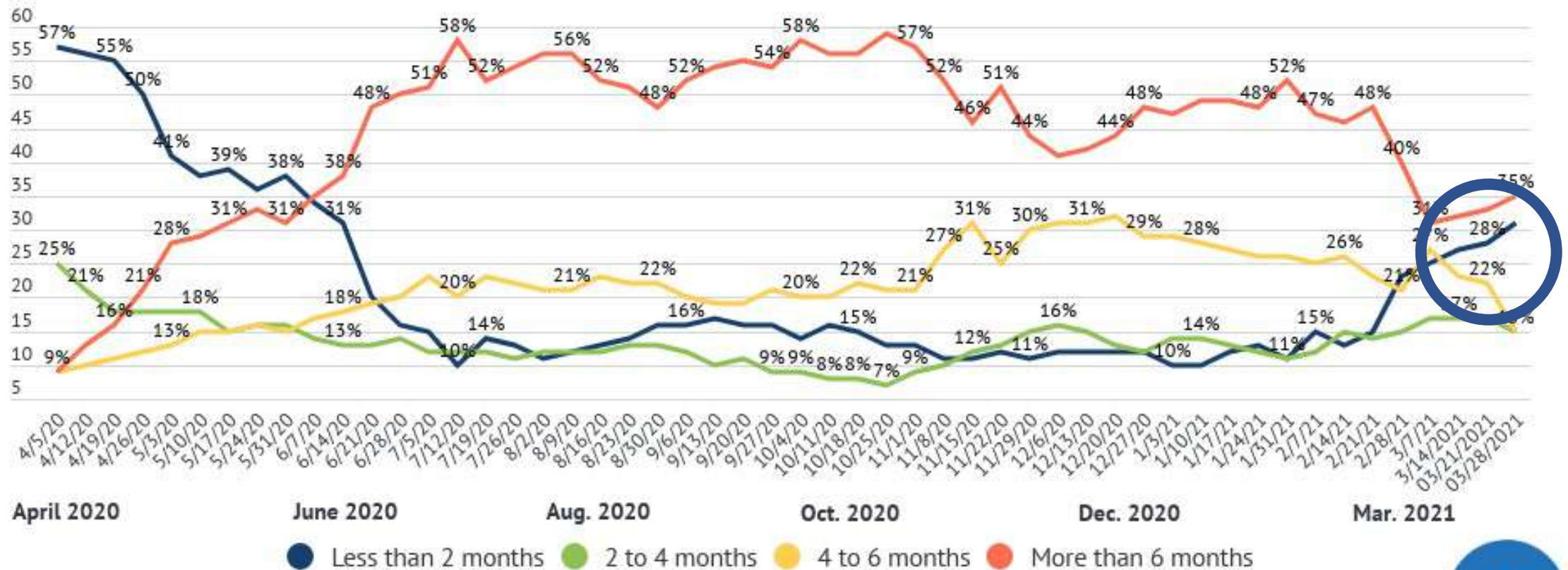
Optimism for the long-term US economy is especially rosy...

HPS-CS Economic Sentiment Index - Five Individual Questions, Since March 31, 2020



No surprise, it has a lot to do with growing consensus that **we're seeing a light at the end of the tunnel.**

For how much longer do you expect to have to practice self-isolation and social distancing in response to the coronavirus outbreak? – Weekly percentage



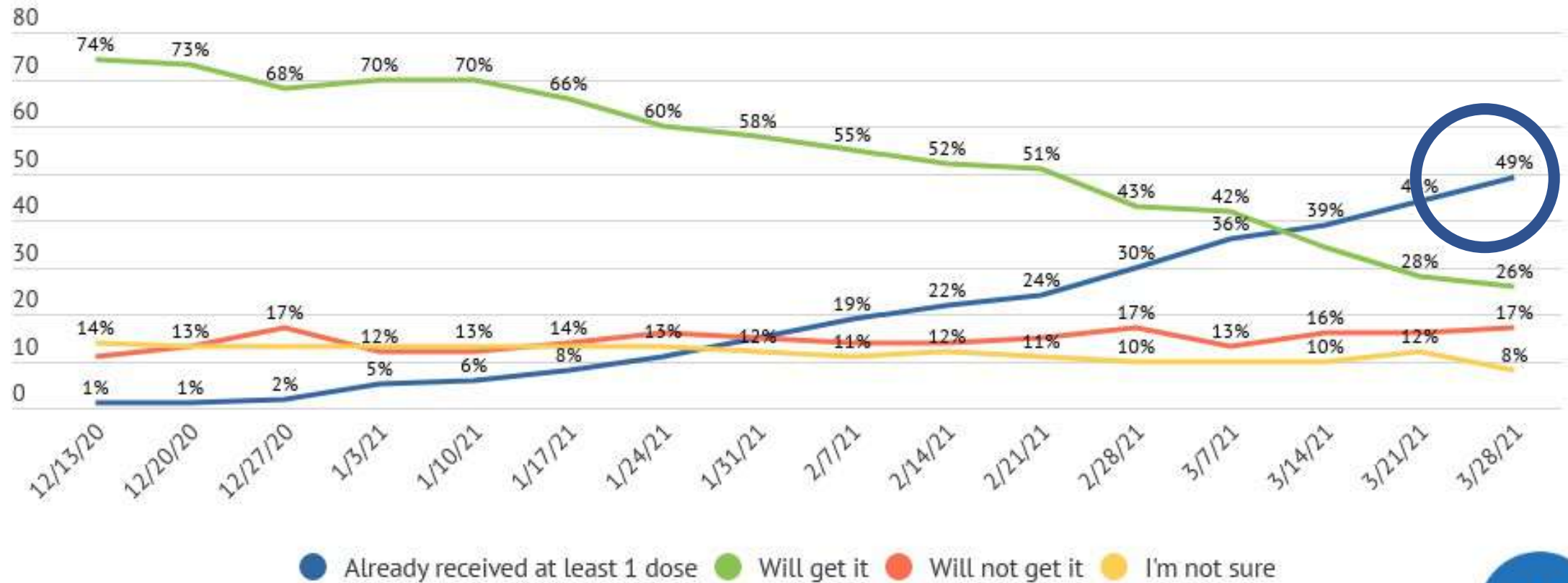
276,899 responses, weighted by U.S. Census 18+
 Survey Dates: 04/07/2020 to 03/31/2021
 © CivicScience 2021



And that has a lot to do with **vaccine uptake climbing wonderfully**. But the number of anti-vaxxers is stubbornly steady.

When will you opt to receive the coronavirus vaccine once it is available to you?

– Weekly percentage

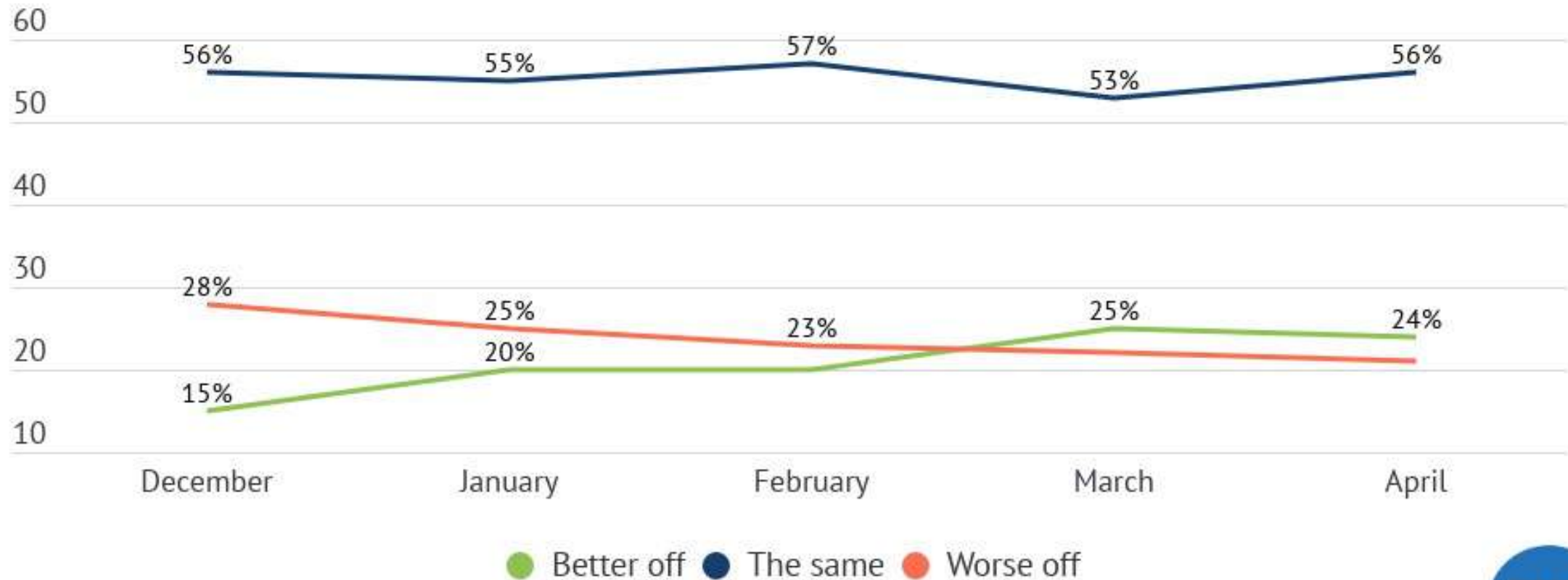


41,509 responses, weighted by U.S. Census 18+
Survey Dates: 12/14/2020 to 04/3/2021
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For the first time, a larger percentage of Americans say they are **better off financially since the beginning of the pandemic**. Think about that.

Would you say you're financially better or worse off than before the COVID-19 pandemic?
– Monthly percentage

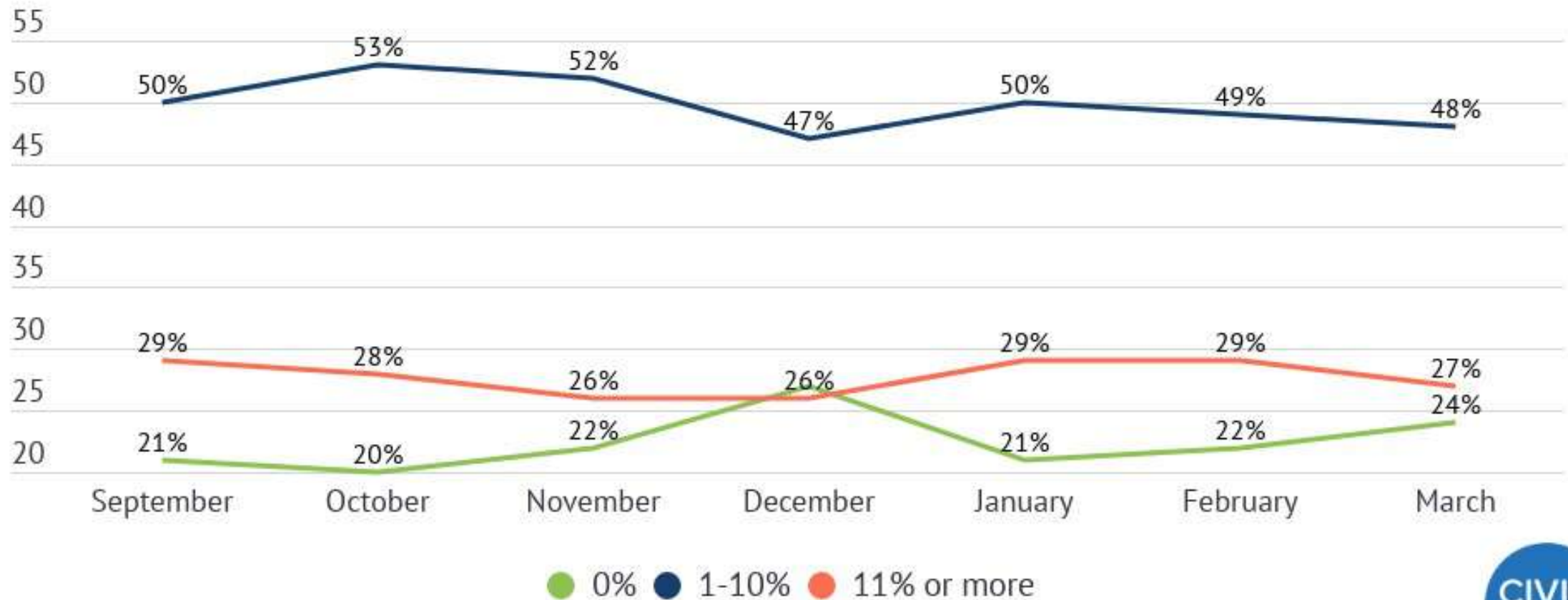


117,529 responses, weighted by U.S. Census 18+
Survey Dates: 12/21/2020 to 04/7/2021
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One way this is manifesting itself is in **rapidly-increased savings**, particularly since Christmas.

What percentage of your income would you say you save on average each month, including retirement savings? – Monthly percentage



118,392 responses, weighted by U.S. Census 18+
Survey Dates: 9/1/2020 to 3/31/2021
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But it's **not that simple...**

The Many, **Two Americas**

Working  *versus* **Not Working** 

Rich  *versus* **Poor** 

Male  *versus* **Female** 

Young  *versus* **Old** 

White  *versus* **Non-White** 

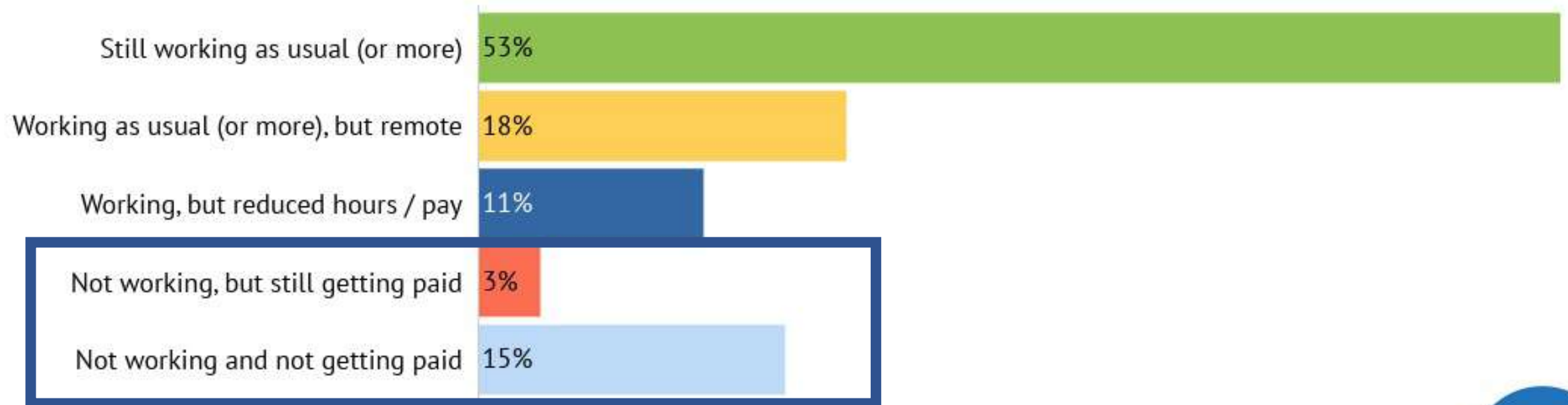
Rural  *versus* **Urban** 

Republican  *versus* **Democrat** 

The pandemic is **not impacting all groups equally** – not even close.

How has your job been impacted by the COVID-19 pandemic?

Among those employed pre-pandemic



48,675 responses weighted by U.S. Census 18+
Survey dates: 01/07/2021 to 04/07/2021
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The rich are definitely **getting richer...**

Would you say you're financially better or worse off than before the COVID-19 pandemic? by *Household Income*

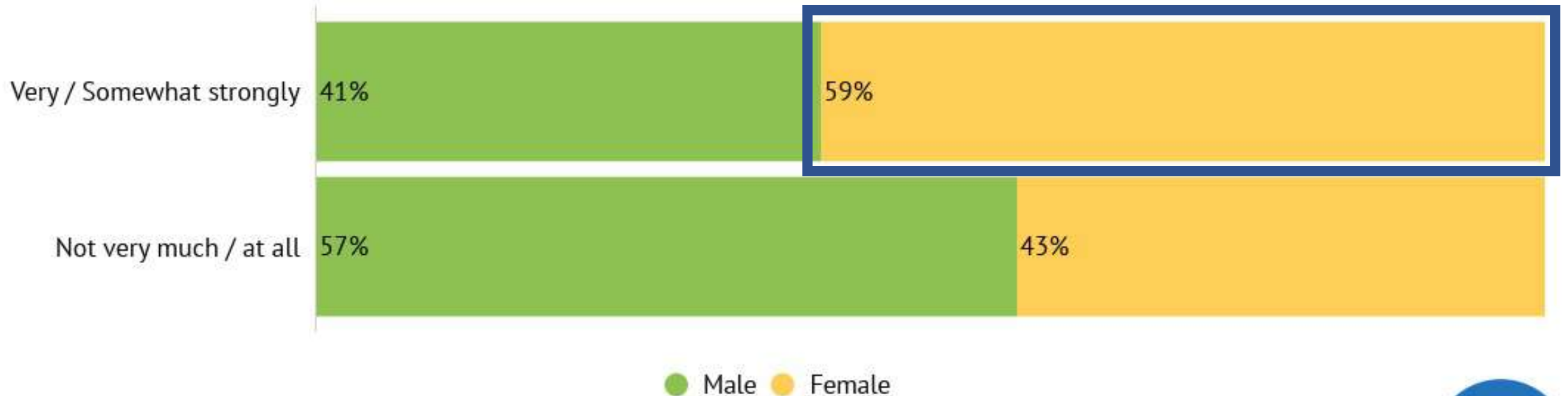


15,108 responses weighted by U.S. Census 18+
Survey dates: 03/08/2021 to 04/07/2021
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The extent to which **the pandemic has disproportionately affected women** cannot be overstated.

How strongly have you felt stressed over the past week or so? compared with *Gender*

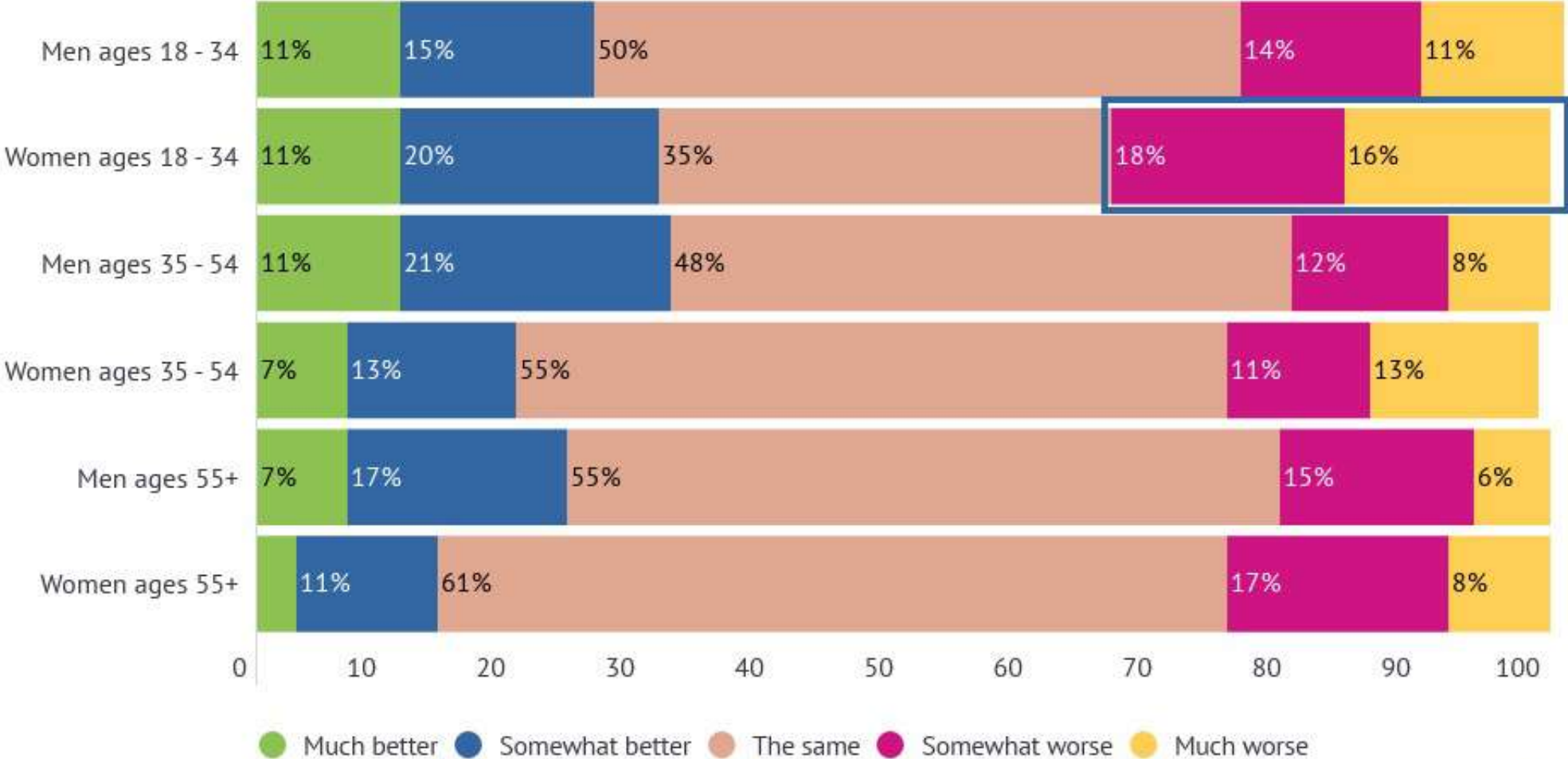


14,796 responses weighted by U.S. Census 18+
Survey dates: 03/08/2021 to 04/07/2021
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The financial implications are **especially bad among women under 35.**

Would you say you're financially better or worse off than before the COVID-19 pandemic? by Age + Gender

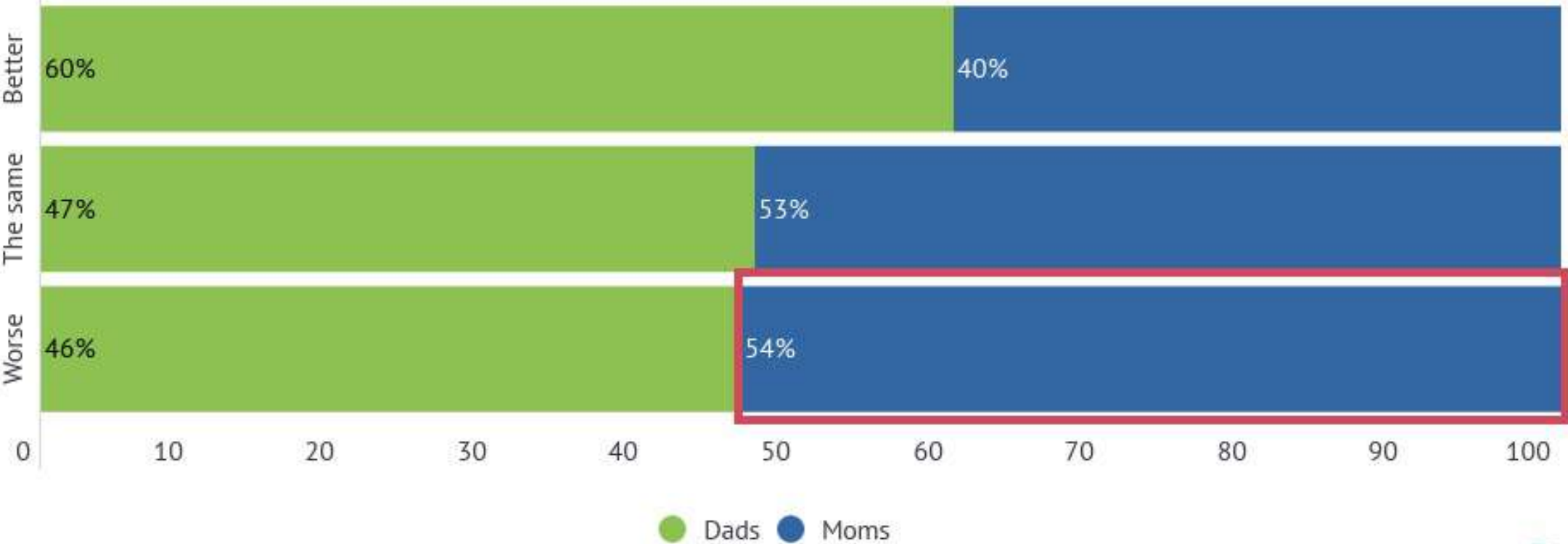


3,834 responses, weighted by U.S. Census (18+)
Survey dates: Mar 1, 2021 - Apr 6, 2021
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But that's not even the worst part. The **outsized financial impact on working moms** is staggering.

Would you say you're financially better or worse off than before the COVID-19 pandemic?
Among Parents Only

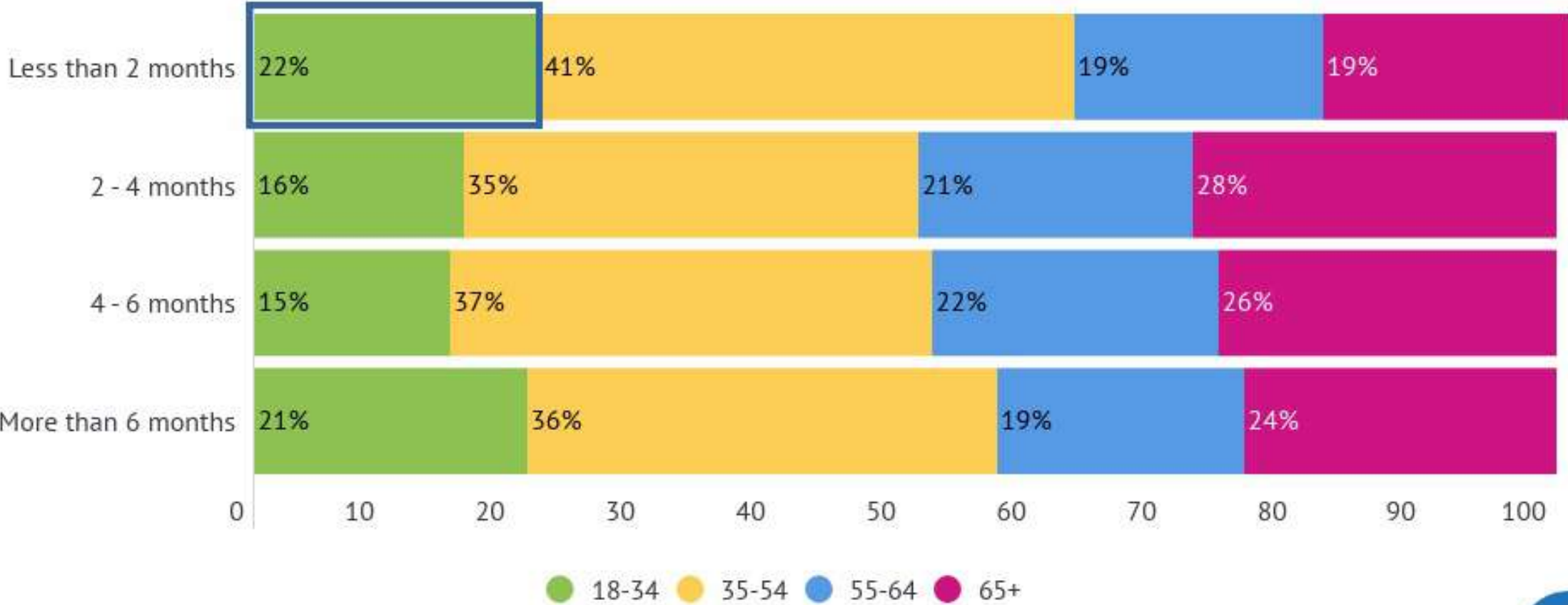


29,362 responses, weighted by U.S. Census (18+)
Survey dates: Jan 1, 2021 - Apr 7, 2021
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Even as the older population is being vaccinated at faster rates, **younger consumers are expecting a faster return to normal.**

For how much longer do you expect to have to practice self-isolation and social distancing in response to the coronavirus outbreak? *compared with Age*

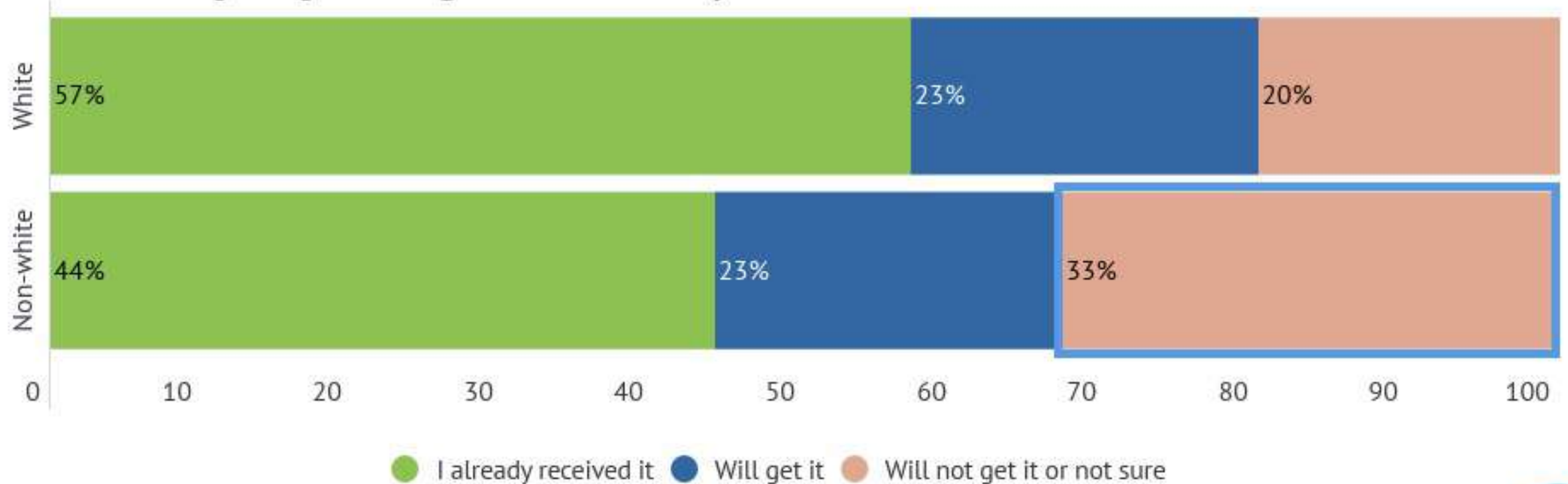


2,247 responses, weighted by U.S. Census (18+)
Survey dates: Mar 31, 2021 - Apr 6, 2021
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Lower (or slower) vaccination rates among non-white Americans could shape the recovery very differently from a public health and economic standpoint.

When will you opt to receive the coronavirus vaccine once it is available to you? compared with Which of the following best describes your race?

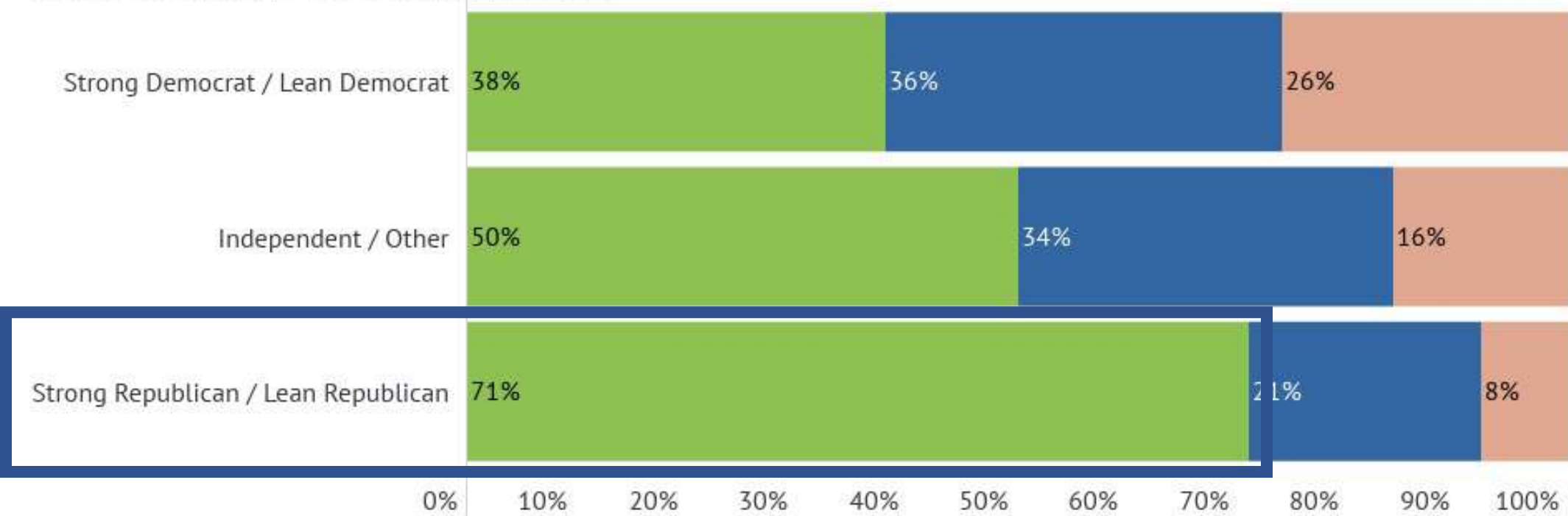


1,549 responses, weighted by U.S. Census (18+)
Survey dates: Mar 31, 2021 - Apr 6, 2021
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Political tribalism continues to be a pervasive force in determining how a recovery unfolds for different regions, industries, and brands.

If your state / local government issued a notice to go back to normal day-to-day activities in order to prevent any further negative impact on the economy, how would you respond? compared with Political Affiliation



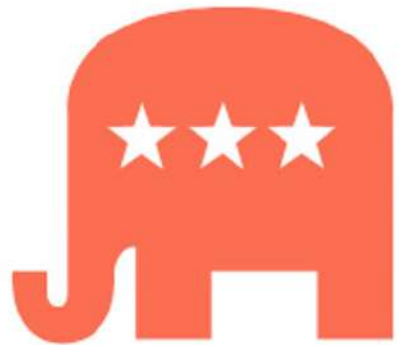
● I would resume all or most normal activities ● I would resume some normal activities ● I would remain in quarantine

17,137 responses, weighted by U.S. Census (18+)
Survey dates: Mar 7, 2021 - Apr 6, 2021
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Political tribalism continues to be a pervasive force in determining how a recovery unfolds for different regions, industries, and brands.

How soon from now would you be comfortable going out to eat at restaurants? by *Political Affiliation*



Now: 83%

4+ months: 17%



Now: 54%

4+ months: 46%

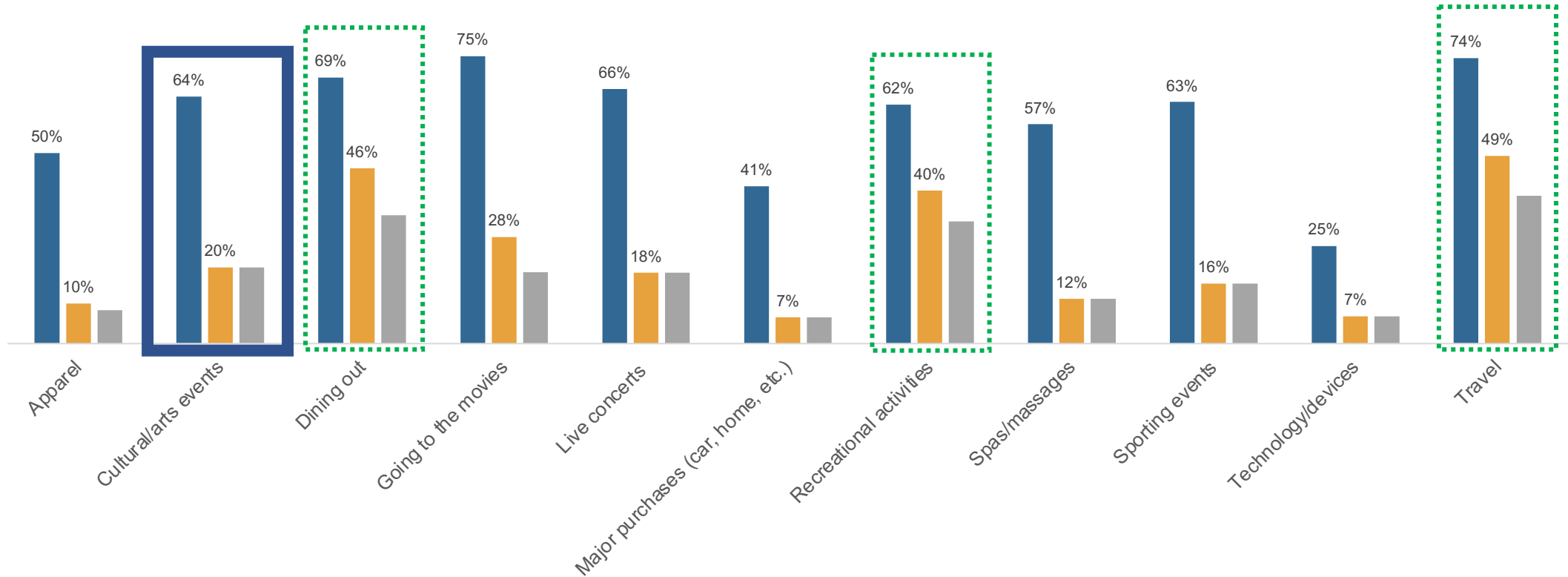
10,147 responses, weighted by U.S. Census (18+)
Survey Dates: 3/9/2021 to 4/8/2021
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The return of **experience spending**

While consumers haven't been spending less on all 'experiences' during the pandemic, **travel, dining out, and recreational activities** will have the strongest recovery post-pandemic.

% Spent Less vs. % Will Spend More Than During Pandemic



■ Have spent less DURING the pandemic ■ Will spend more than DURING the pandemic ■ Will spend more than BEFORE the pandemic

Over 36% of U.S. adults are **eager to attend a musical production** – somewhere – when COVID is finally behind us.

How likely are you to attend a musical theater production on Broadway or elsewhere when the pandemic is over?

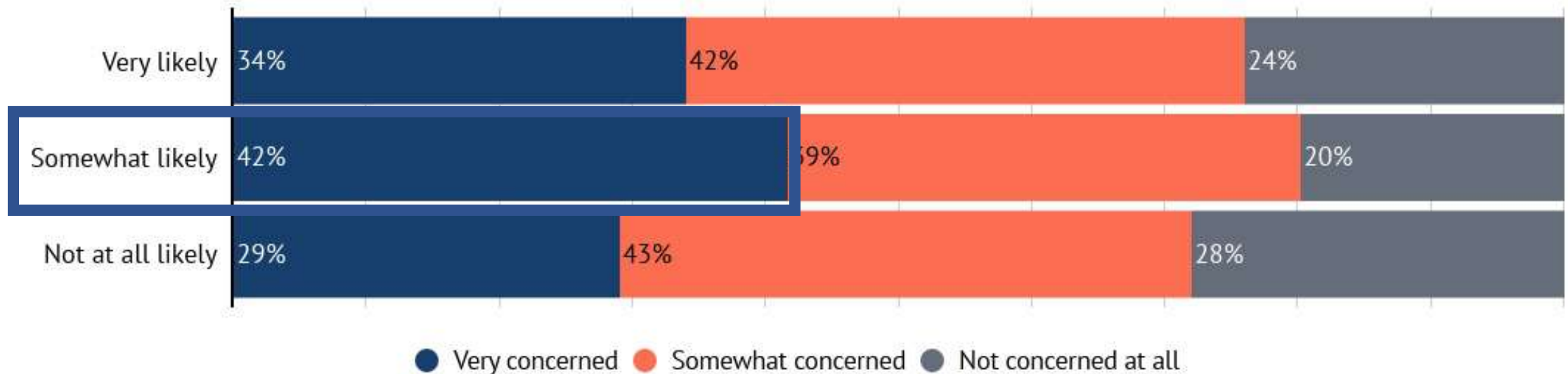


5,756 responses, weighted by U.S. Census 18+
Survey Date: April 8, 2021
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The **“on the fence” theater-goers are the most likely to be cautious** about being in public spaces, which could delay a return to full capacity.

How likely are you to attend a musical theater production on Broadway or elsewhere when the pandemic is over? compared with *How concerned are you about being in public spaces right now?*

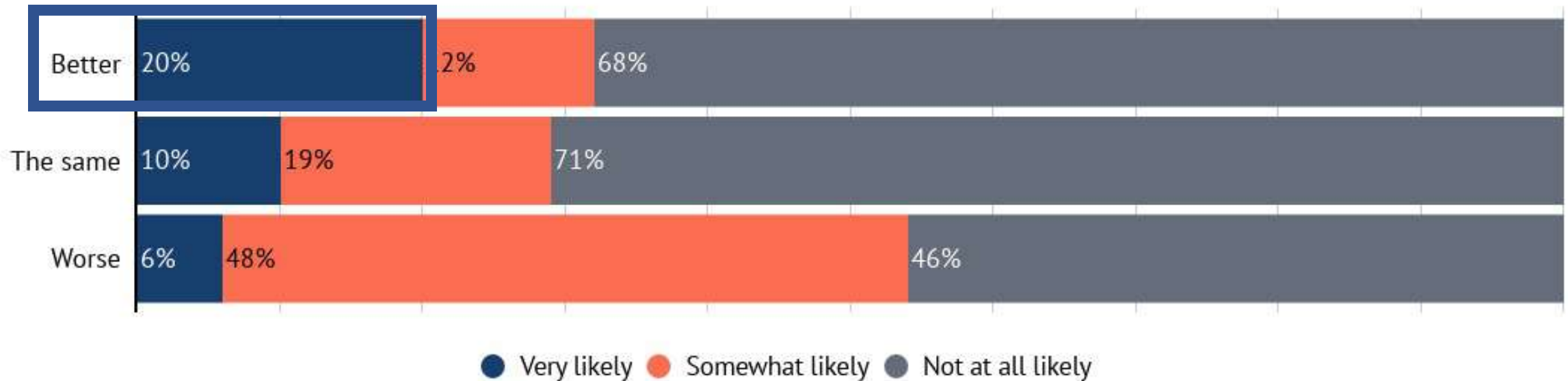


1,867 responses, weighted by U.S. Census 18+
Survey Dates: March 9, 2021 - April 8, 2021
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The most eager theater-goers are **far more likely to report improved financial health since the pandemic**, which should play into pricing strategy.

Would you say you're financially better or worse off than before the COVID-19 pandemic?
compared with *How likely are you to attend a musical theater production on Broadway or elsewhere when the pandemic is over?*

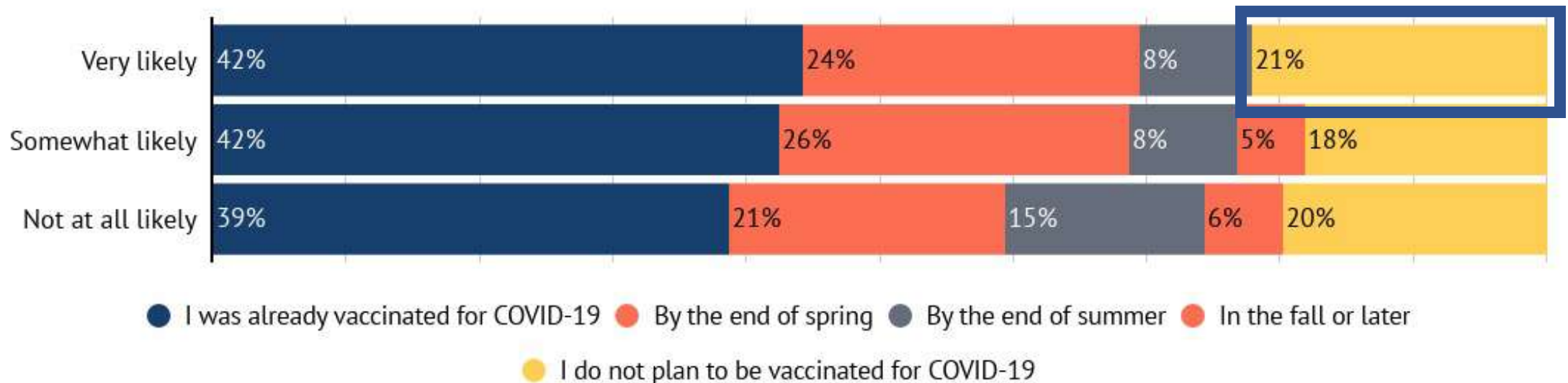


213 responses, weighted by U.S. Census 18+
Survey Dates: March 9, 2021 - April 8, 2021
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But that extra-eager group is also the **most likely to say they won't be getting vaccinated.**

How likely are you to attend a musical theater production on Broadway or elsewhere when the pandemic is over? compared with *When do you expect to be vaccinated for COVID-19, at the latest?*

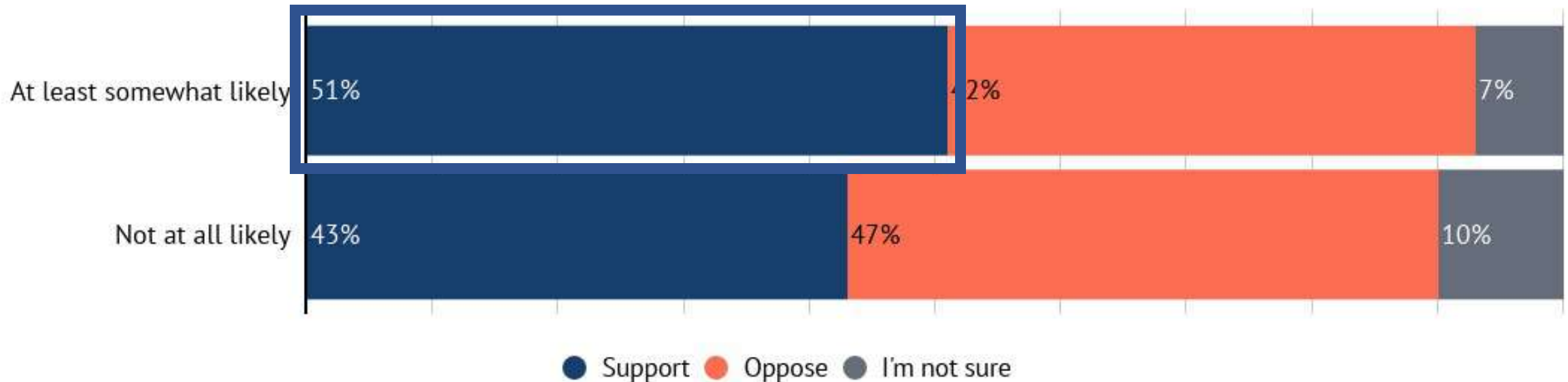


743 responses, weighted by U.S. Census 18+
Survey Dates: March 9, 2021 - April 8, 2021
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The majority of likely or somewhat likely audience members **support the idea of “vaccine passports”** but it’s still a very divisive issue.

How likely are you to attend a musical theater production on Broadway or elsewhere when the pandemic is over? compared with *Do you support or oppose the idea of requiring people to present vaccine passports (digital certifications of vaccine status) to attend large events?*



921 responses, weighted by U.S. Census 18+
Survey Dates: April 1, 2021 - April 8, 2021
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The most likely eager theater-goer skews younger.

To what broad age group do you belong? compared with *How likely are you to attend a musical theater production on Broadway or elsewhere when the pandemic is over?*

> All respondents in my account

> Weighted according to U.S. Census figures for gender and age, 18 and older

To what broad age group do you belong?

18-34 (30%)



35-54 (34%)



55 - 64 (17%)



65 or older (20%)



How likely are you to attend a musical theater production on Broadway or elsewhere when the pandemic is over?

Very likely Somewhat likely Not at all likely

Social media will play a profound role in influencing potential theater-goers.

How likely are you to attend a musical theater production on Broadway or elsewhere when the pandemic is over? compared with **How much do your friends and other contacts on social media influence the movies and television shows you watch?**

> All respondents in my account

> Weighted according to U.S. Census figures for gender and age, 18 and older

How likely are you to attend a musical theater production on Broadway or elsewhere when the pandemic is over?

Very likely (14%)



Somewhat likely (19%)



Not at all likely (67%)



How much do your friends and other contacts on social media influence the movies and television shows you watch?

■ A lot / a little ■ Not at all

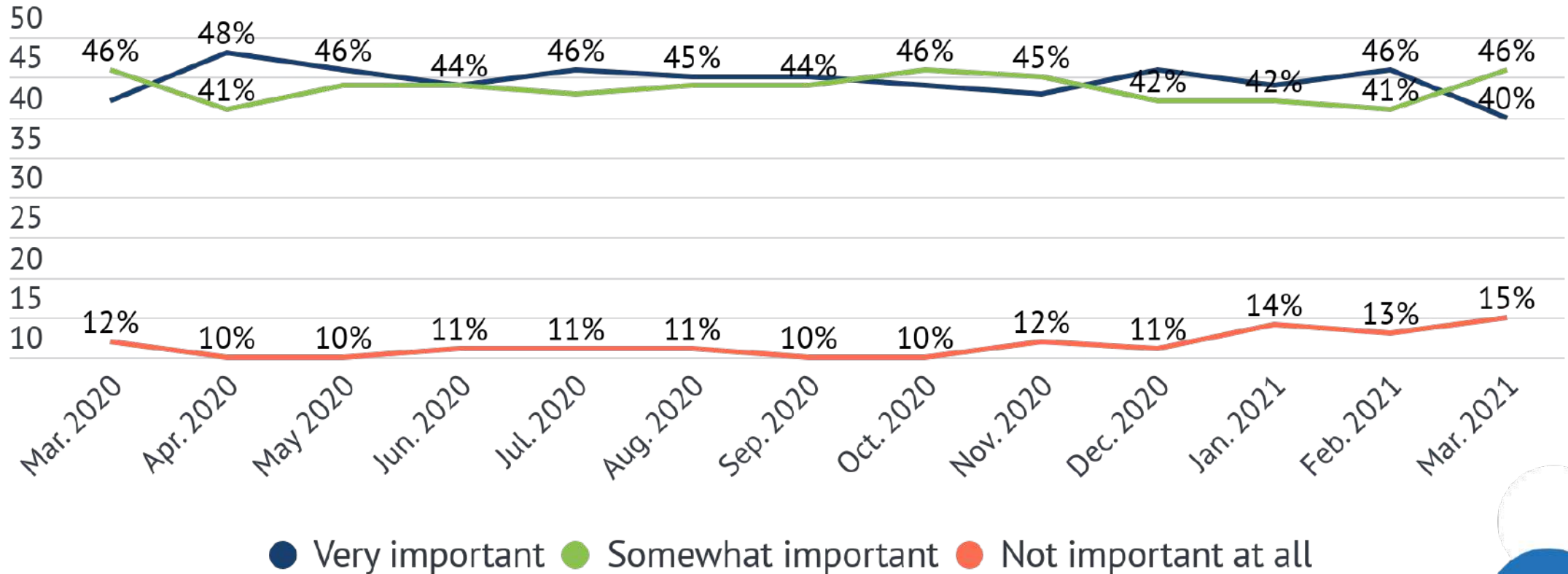
2,218 responses. Significance: $X^2_{(df=2)}=99.074, p<0.001$, High Strength of Association (T=0.178)

Generated by CivicScience® on Apr 9, 2021 at 13:07:58 EDT

Other **stuff**

Support for locally-owned establishments peaked in the early days of the pandemic before settling – only to see a small bump early in 2021.

How important to you is it to you to shop at locally-owned establishments? – Monthly percentage

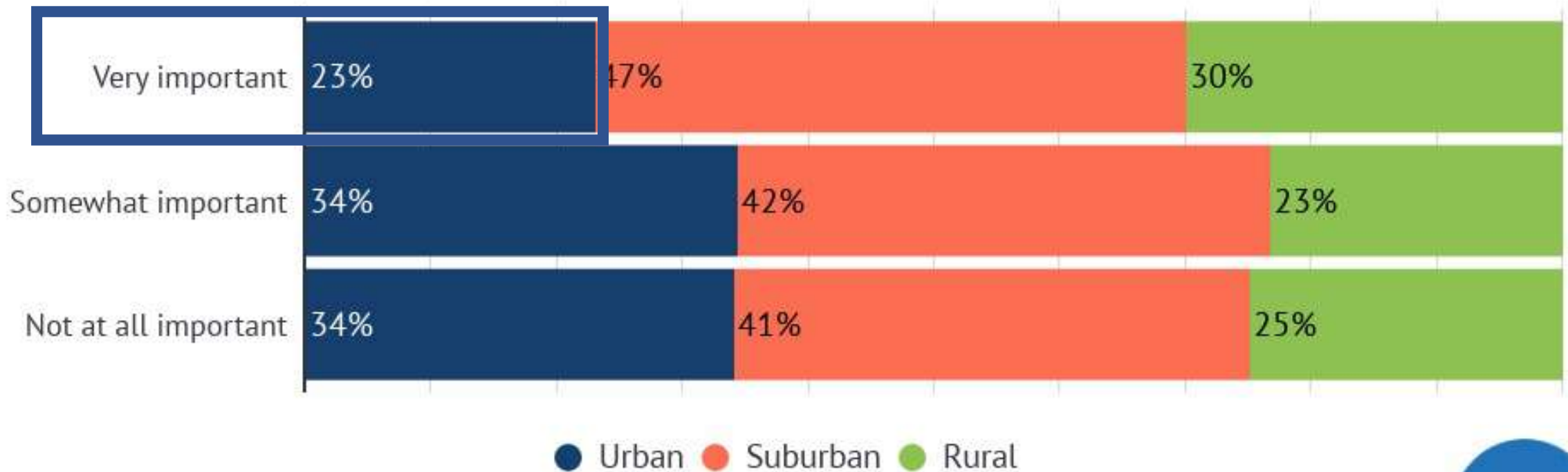


369,826 responses, weighted by U.S. Census 18+
Survey Dates: 3/1/2020 to 3/31/2021
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But this appears to be a primarily non-urban phenomenon – as **city dwellers are far less likely to prioritize supporting local businesses.**

How important is it to you to shop at locally-owned establishments? compared with *Residential area*

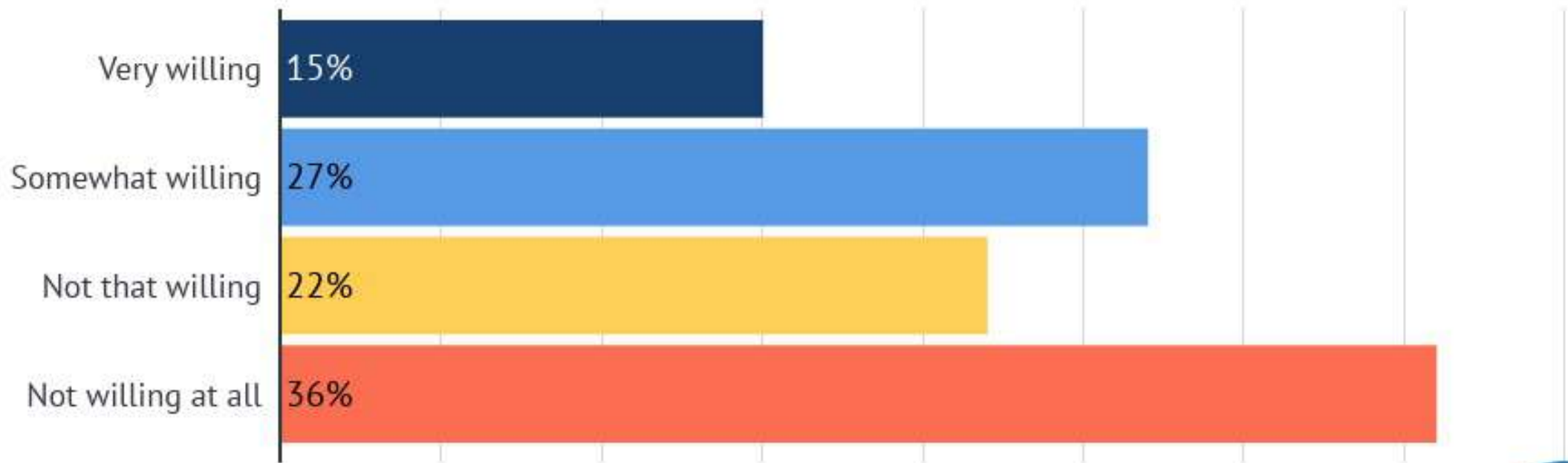


12,466 responses, weighted by U.S. Census 18+
Survey Dates: 3/9/2021 to 4/8/2021
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The allure of remote work is **here to stay**. 41% of U.S. adults would consider taking a pay cut in order to work from anywhere they choose.

How willing would you be to accept a lower salary / pay cut in exchange for the option to work remotely from any location of your choosing?

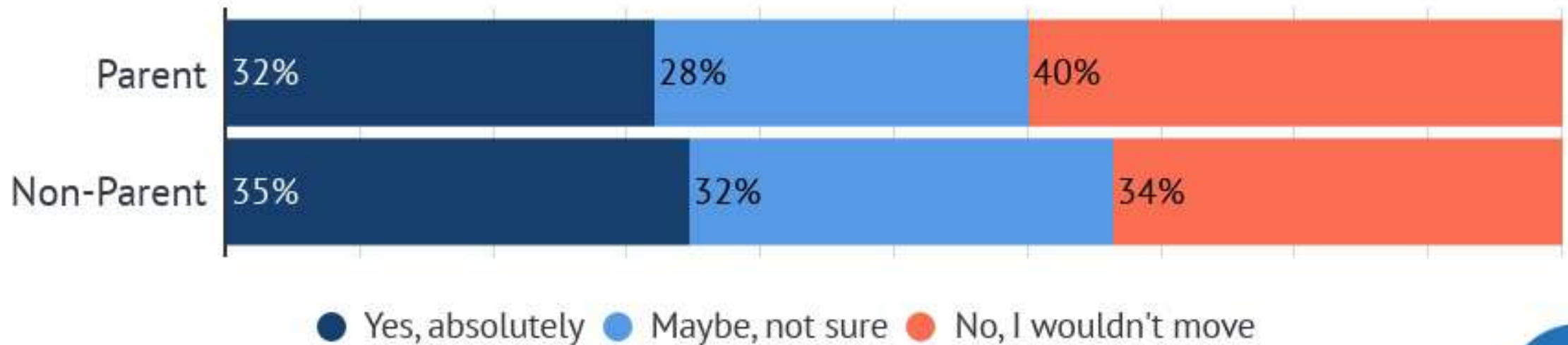


2,829 responses, weighted by U.S. Census 18+
Survey Date: 2/8/2021 to 4/8/2021
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This will be particularly **important in the competition for younger workers**, many of whom would move to a new location if their job allowed it.

If you could always work remotely, would you move to a different city / state?
by *Parental status*

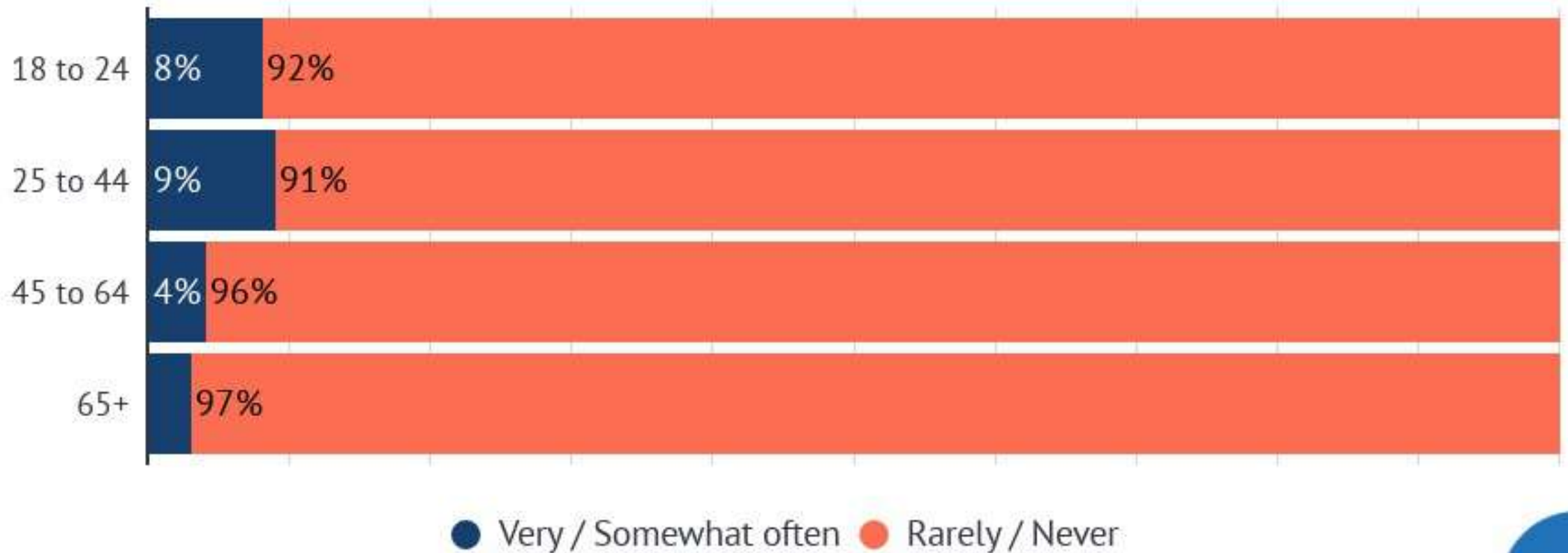


1,919 responses, weighted by U.S. Census 18+
Survey Dates: 2/8/2021 to 4/8/2021
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Pent up cash – especially after stimulus checks aimed largely at younger adults – is causing a **surge in things like sports betting, collectibles, and day-trading.**

How often do you bet on sports games? by Age



3,197 responses, weighted by U.S. Census 18+
Survey Dates: 3/10/2021 to 4/8/2021
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A photograph of a bar counter. In the foreground, a copper mug with a curved handle sits on a dark napkin. To the left, a small metal bowl contains several bright green limes. In the background, a bottle of beer is visible, and the scene is lit with warm, bokeh-style lights, creating a cozy atmosphere.

Thank You

For any questions, please contact **John Dick**
at jdick@civicscience.com