The Consumer Sentiment Series

Snapshot #19

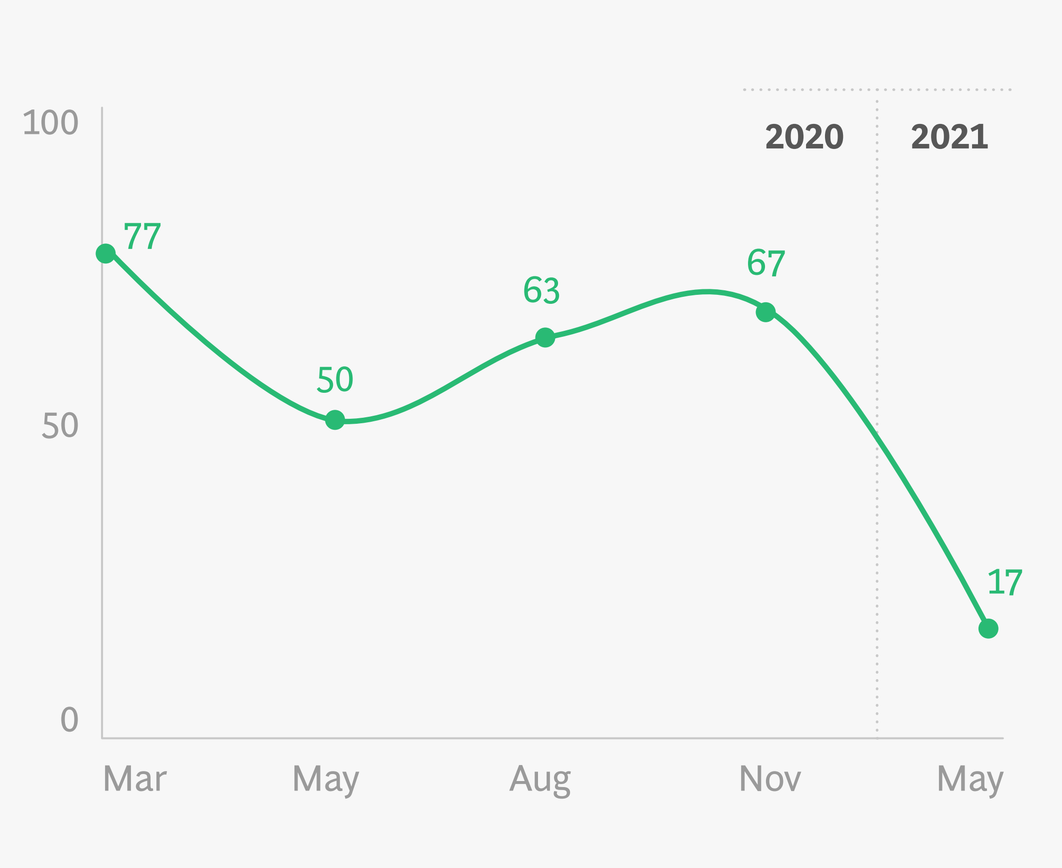
May 2021: Opening Closed Doors

June 24, 2021

We are open—reopened—and that is creating optimism. In fact, US consumers are far more optimistic today than they were 14 months earlier, with only 17% believing that the worst of the pandemic still lies ahead, compared to 77% in March 2020. Even so, their optimism is coupled with a significant degree of hesitancy about fully returning to normal or to the way they lived before COVID-19. Over half of US consumers continue to avoid public spaces, and two-thirds are cautious about returning to pre-pandemic activities.

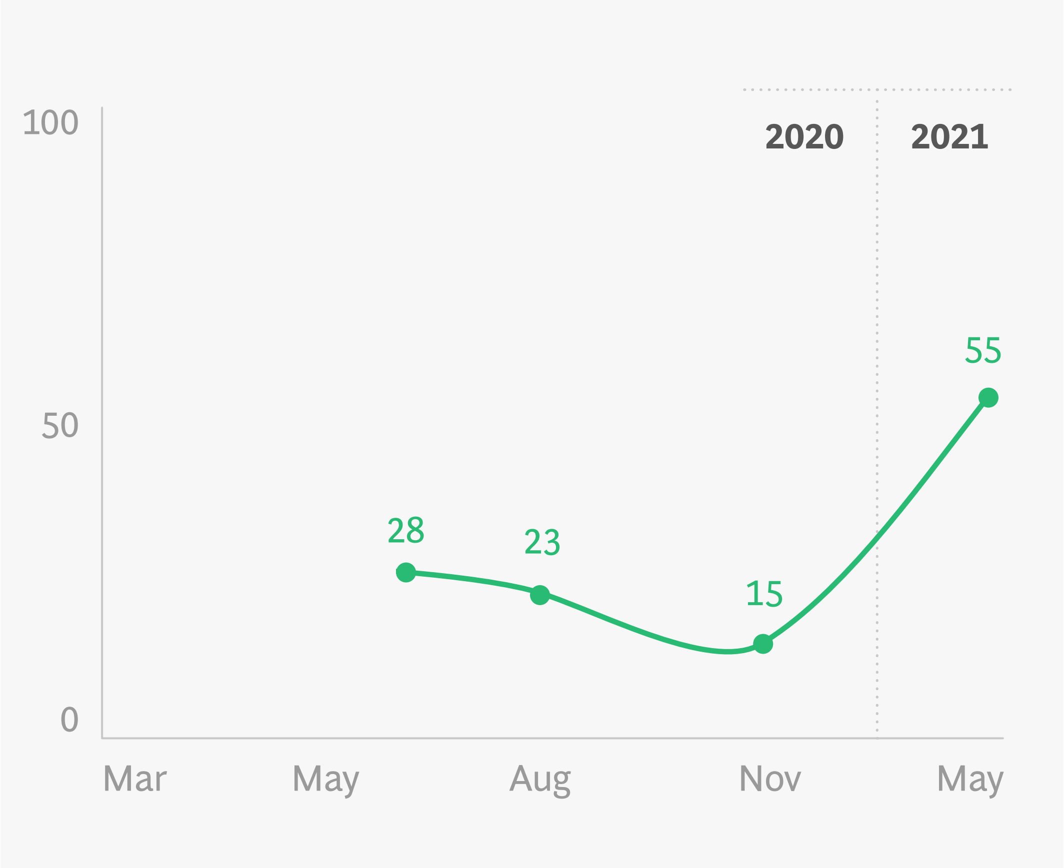
US Consumers Are Much More Optimistic Than They Were a Year Ago That We Are Moving Past COVID-19

The worst of the coronavirus is still ahead (%)



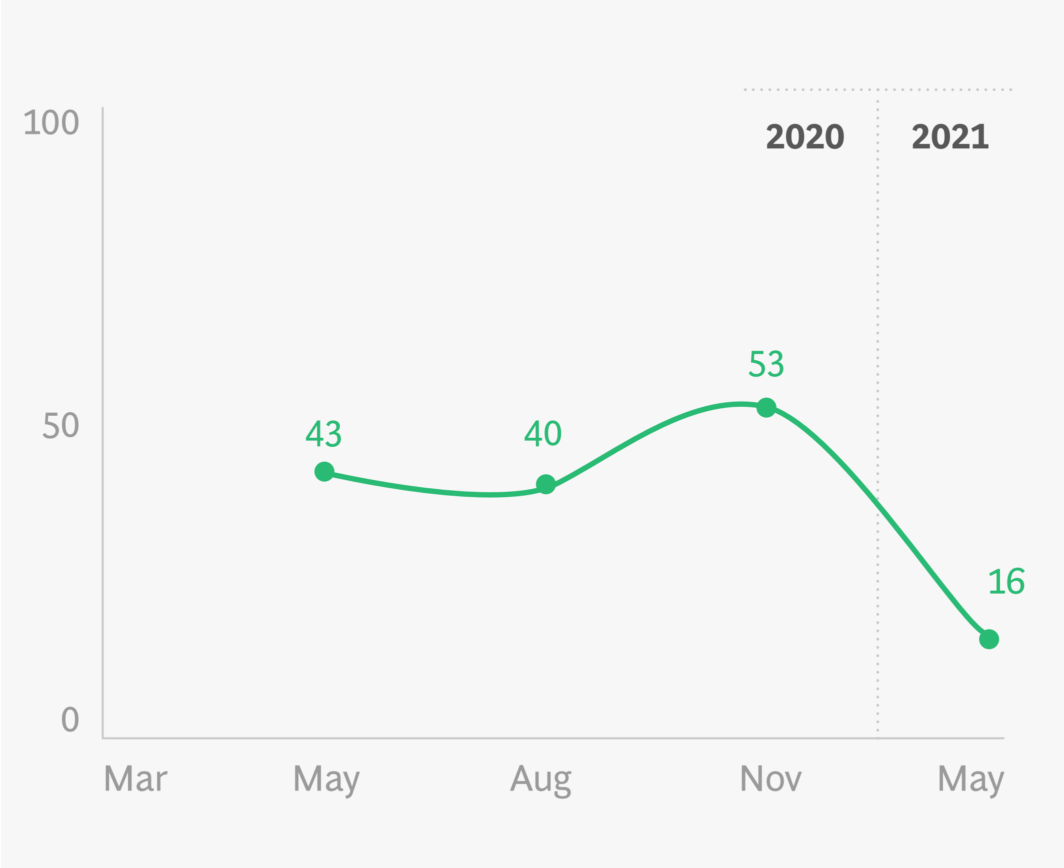
The vast majority of respondents believe that the worst of the coronavirus is behind us

The coronavirus is under control where I live (%)



A widespread sense that the virus is now under control is encouraging people to resume their lives

There will be another lockdown in the next 12 months where I live (%)

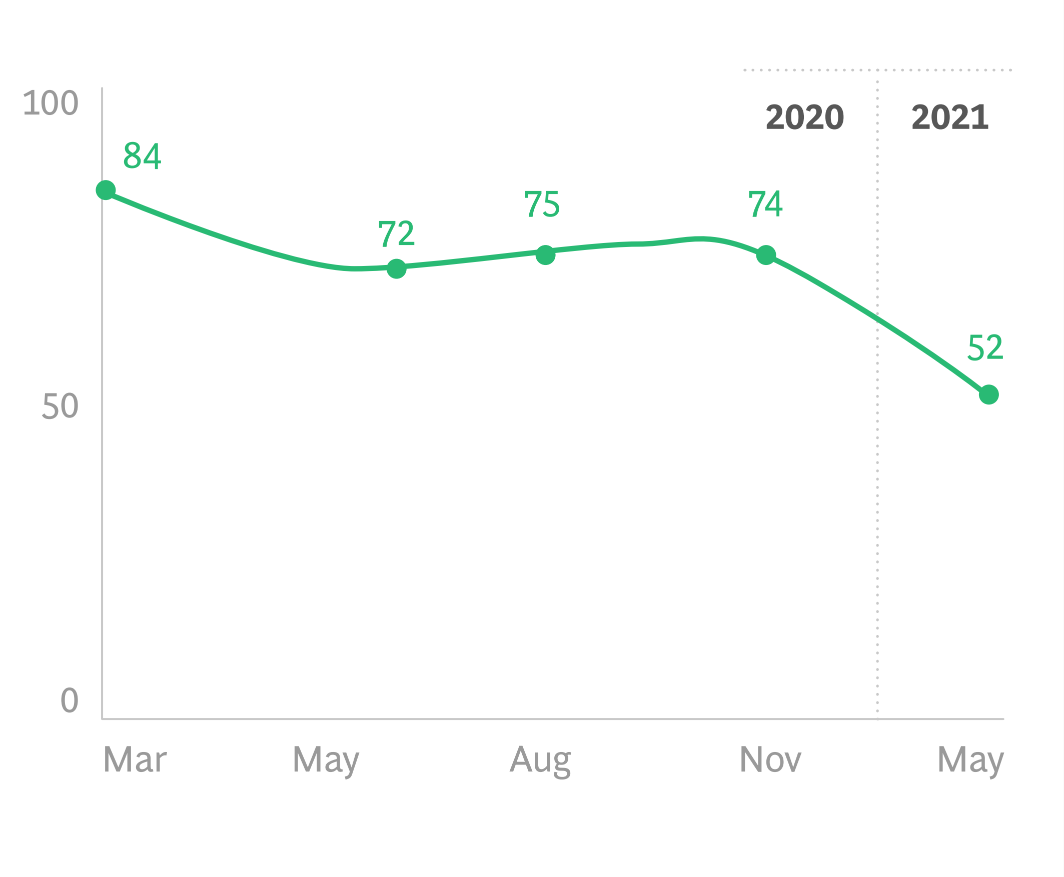


Relatively few people expect another shutdown within the next year

Source: BCG COVID-19 Consumer Sentiment Survey, March 2020–May 2021 (n = 2,000–4,558, unweighted, representative within ~3 percentage points of the US census).
Note: Question text: "How much do you agree with each of the following statements about the COVID-19 pandemic?"

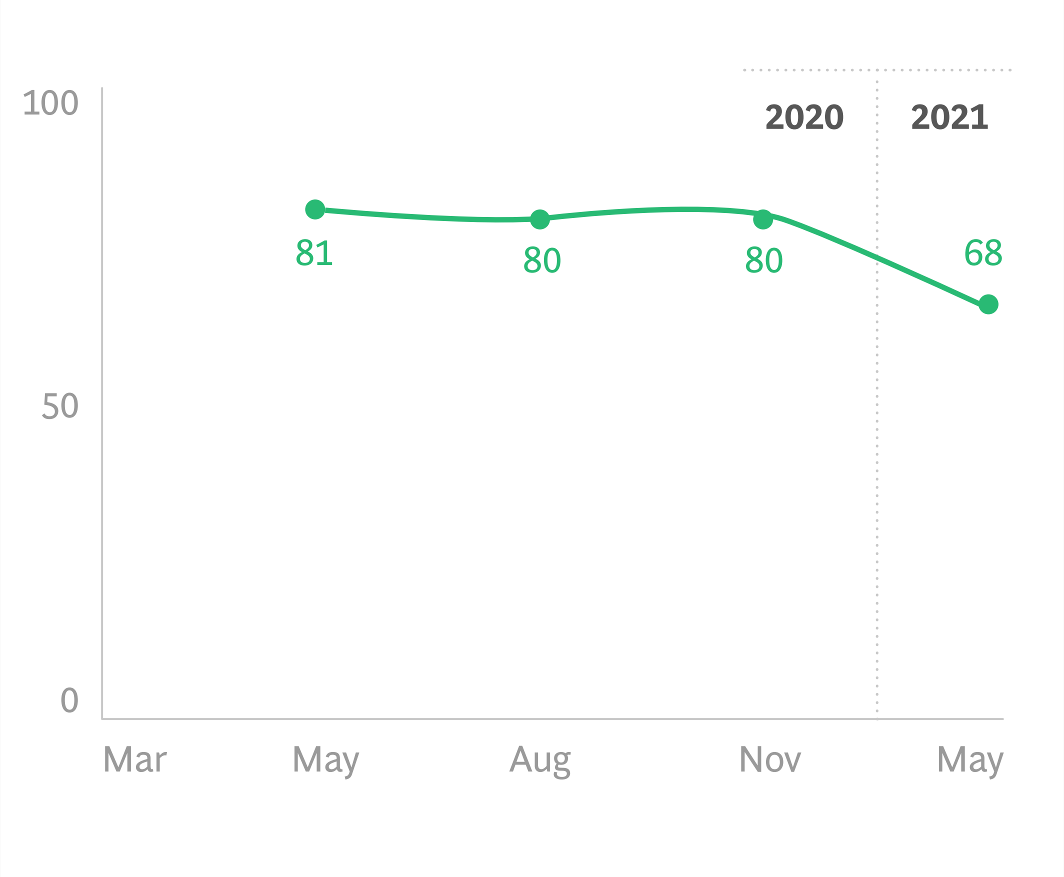
More Consumers Are Venturing Out, but Many Say That They Won't Be Fully Comfortable Until the US Vaccination Rate Reaches a Higher Level

I'm trying to avoid public spaces as much as possible due to the coronavirus (%)



More consumers are venturing out than did before, but about 50% continue to avoid public spaces

If we are not careful, there will be a spike in new cases again (%)



Despite progress, high levels of concern persist that the situation could worsen if we act carelessly

To reach their pre-COVID-19 comfort level…[1]

46% of respondents say they would need more people outside their households to be vaccinated…

…with most waiting for a **70%+** vaccination rate to feel comfortable

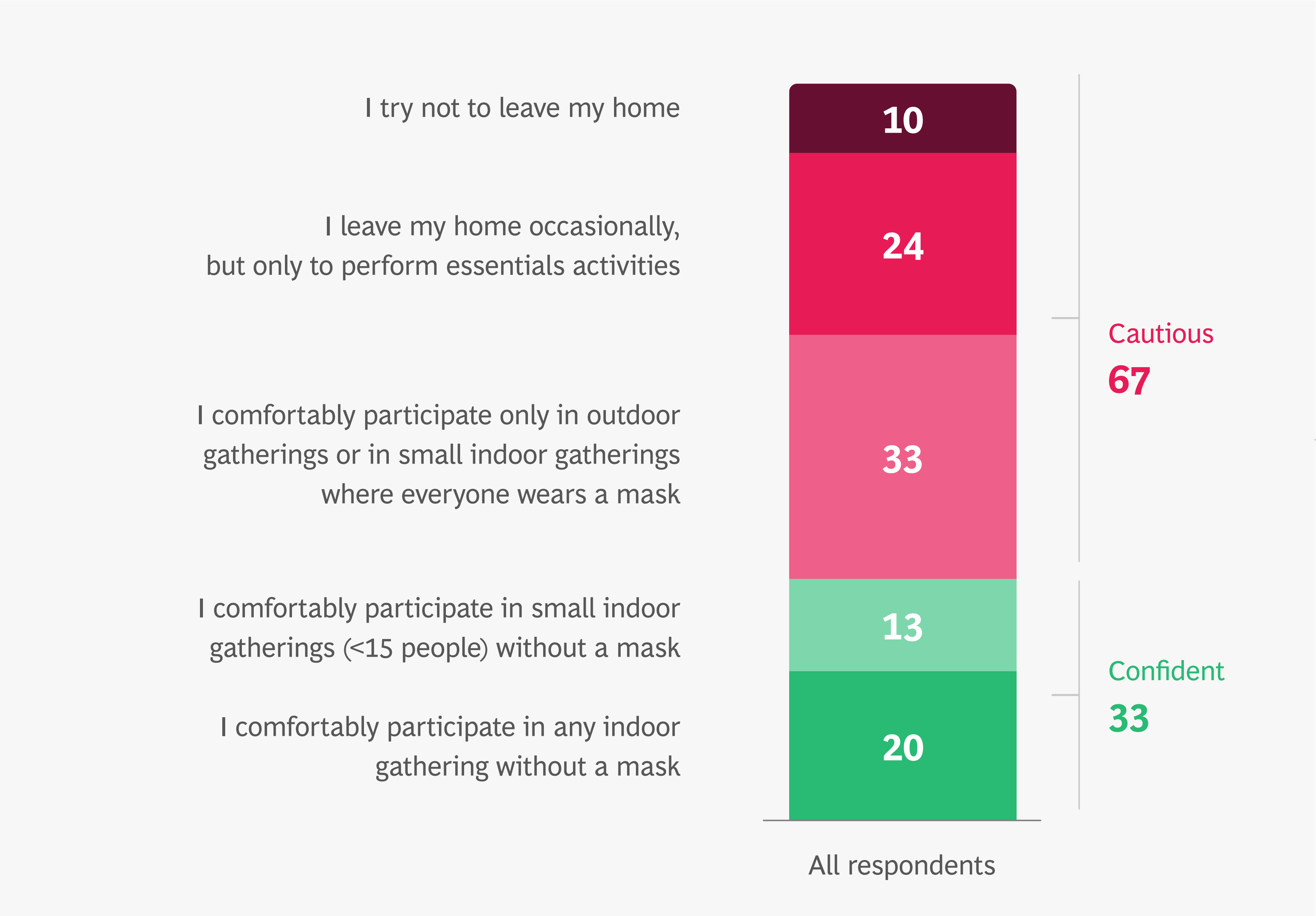
17% don't anticipate ever feeling comfortable

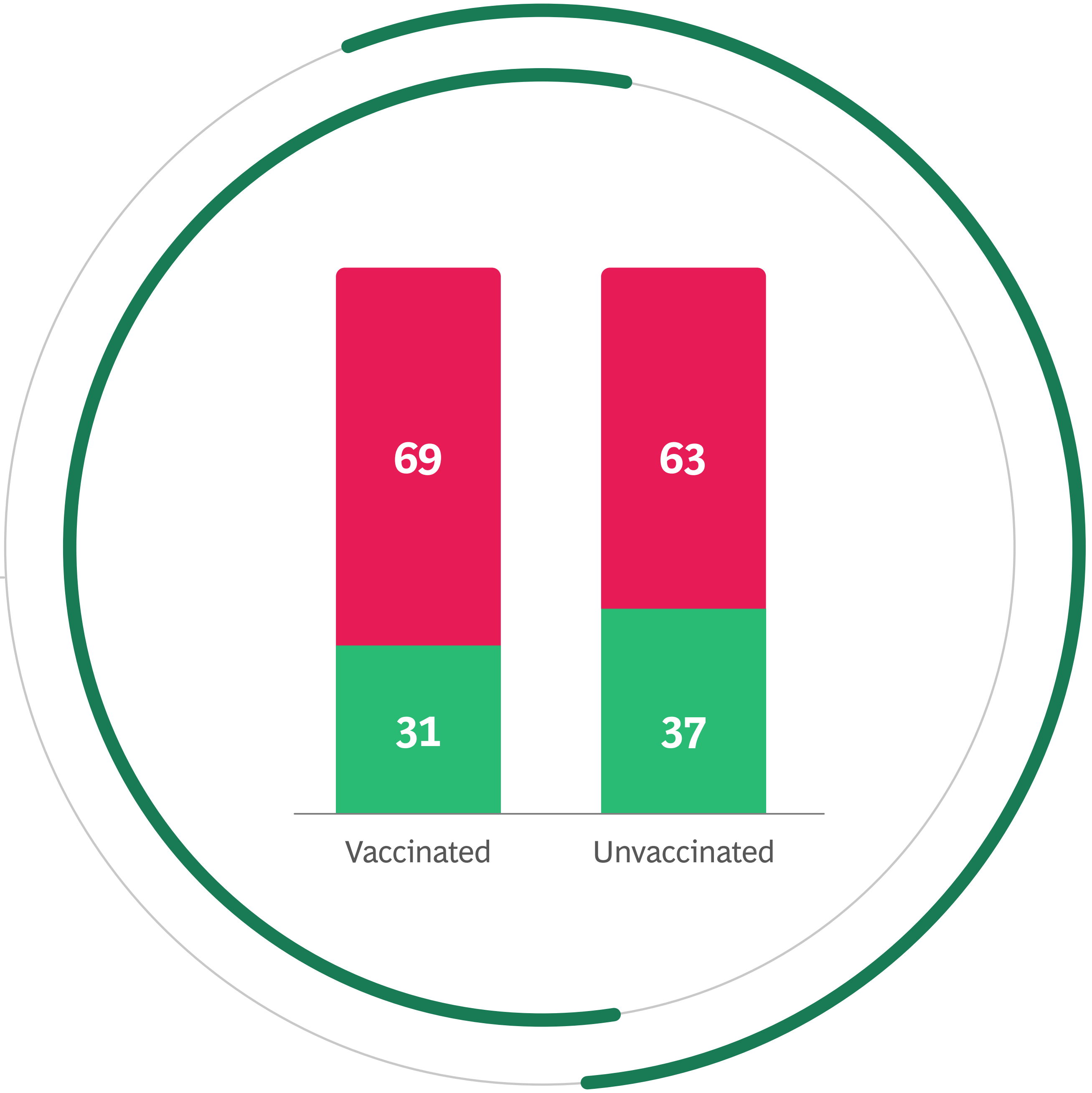
Source: BCG COVID-19 Consumer Sentiment Survey, March 2020–May 2021 (n = 2,000–4,558, unweighted, representative within ~3 percentage points of the US census).
Note: Question text: "How much do you agree with each of the following statements about the COVID-19 pandemic?" and "Which of these are required for you to participate in any large (>15 people) indoor gathering without masks?" and "What level of vaccination of the US population would be needed for you to feel as comfortable attending large (>15 people) indoor events without masks as you did pre-COVID-19?"
[1] Specifically, their comfort level about attending large (>15 people) indoor events.

A tale of two types of consumers has emerged as we enter recovery. “Cautious” consumers either avoid leaving their homes except for essential activities or participate only in outdoor or masked indoor gatherings. “Confident” consumers comfortably participate in indoor gatherings of less than 15 people without a mask or in indoor gatherings of any kind without a mask.

Two-Thirds of US Consumers Are Cautious About Returning to Pre-COVID-19 Activities, and Their Vaccination Status Doesn't Predict Their Sentiment

Current comfort level with returning to pre-COVID-19 activities (%)





Source: BCG COVID-19 Consumer Sentiment Survey, May 20–23, 2021 (n = 4,558, unweighted, representative within ~3 percentage points of the US census).
Note: Question text: "Which of these options best describes your current comfort level in returning to pre-COVID-19 activities?" and "Which statement best describes your current COVID-19 vaccine status?"
"Cautious" applies to those who try not to leave home, who attend outdoor gatherings only, or who always wear masks when attending indoor gatherings. "Confident" applies to those who attend indoor gatherings without masks.

Although many consumers in the US market are vaccinated, personal vaccination status does not significantly impact level of caution overall in our survey results: nearly two-thirds of those vaccinated (69%) and unvaccinated (63%) indicate that they are cautious. Indeed, many focus on whether others they encounter when they return to activities are vaccinated and say they won't be entirely comfortable venturing out until at least 70% of US consumers receive vaccinations—a milestone that we believe the US can reach in the near term.

GOING DIGITAL: RETAIL AND RESTAURANTS

Despite widespread reopening of businesses, schools, and public places, consumer behavior remains very different today from the way it was before COVID-19. We do see signs of a gradual return to normalcy, but the pandemic seems to have altered some behaviors for the longer term. For instance, although consumers now express limited concern about shopping at stores, 25% of consumers say they are increasing online spending compared to their spending prior to the arrival of the coronavirus, with consumers citing its convenience and efficiency, fast and free shipping, and the ability to avoid crowds as advantages.[1]

1. This is a net percentage, computed by subtracting those who are spending less from those who are spending more.

The Significant Shift Toward Online Spending Continues, but In-Store Spending Is Rebounding as Consumers Return to Stores

Channel spending today vs. before COVID-19

–24% net change in **in-store spending** vs. pre-COVID-19 levels

↑ **9** Change vs. December 2020 (percentage points)

+25% net change in **online spending** vs. pre-COVID-19 levels

0 Change vs. December 2020 (percentage points)

Top reasons why consumer are spending more online

1. More convenient/efficient
2. Fast/free shipping
3. Avoid crowds

Source: BCG COVID-19 Consumer Sentiment Survey, December 2020–May 2021 (n = 3,046–4,558, unweighted, representative within ~3 percentage points of the US census).
Note: Question text: "Approximately how much do you spend today compared to before the COVID-19 pandemic (i.e., 2019)?" and "Why do you expect to continue or increase your online spend?"
"Net change" is the difference between the percentage of respondents who are spending more and the percentage of respondents who are spending less.

We have seen a 9-percentage-point increase in consumers' in-store spending from December 2020 to May 2021, and we anticipate further movement toward in-store spending as the economic recovery continues. Nevertheless, COVID-19 has accelerated online penetration and usage across multiple sectors, and some of this buying behavior and increased spending is likely to persist in the post-recovery era. For instance, 58% of consumers ordered restaurant takeout and delivery online during the pandemic, and 45% of those people were doing so for the first time or in a new way (for example, using a third-party app). Of those who ordered online, about 20% say that they expect to continue ordering online more when the COVID-19 health crisis is over than they did before it began.

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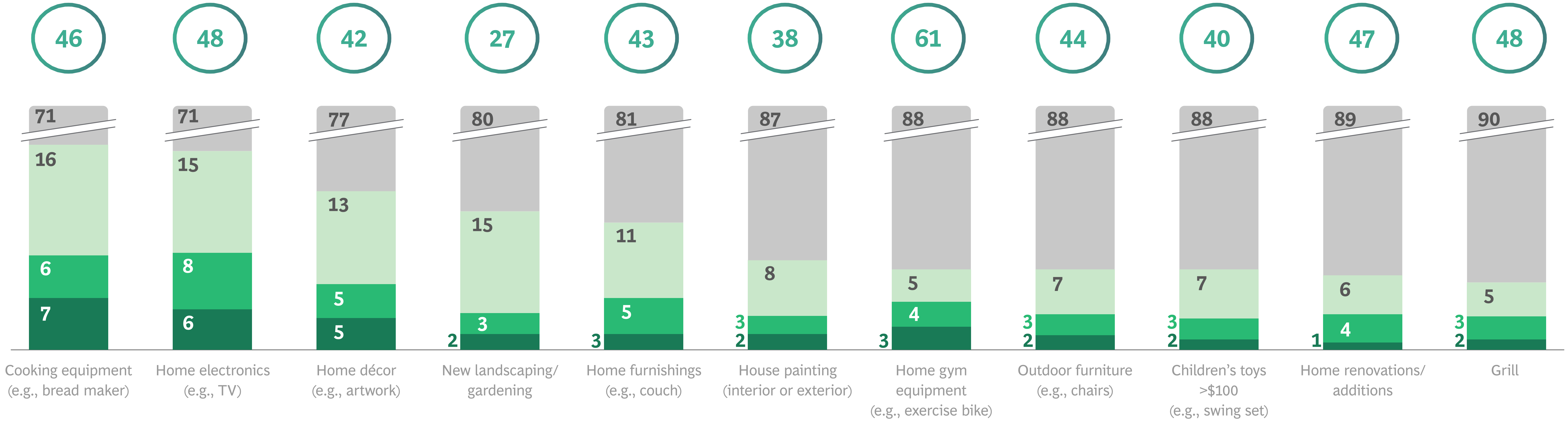
During the Pandemic, Many Consumers Purchased Items for Their Homes That They Hadn't Planned to Buy So Soon—or in Some Cases at All

Did you purchase any of these items between March 2020 and today? How did the timing of this purchase differ from your original plans?

Percentage of respondents (%)



Bought sooner or had not planned to buy (% of all buyers)

Did not buy

Bought as planned

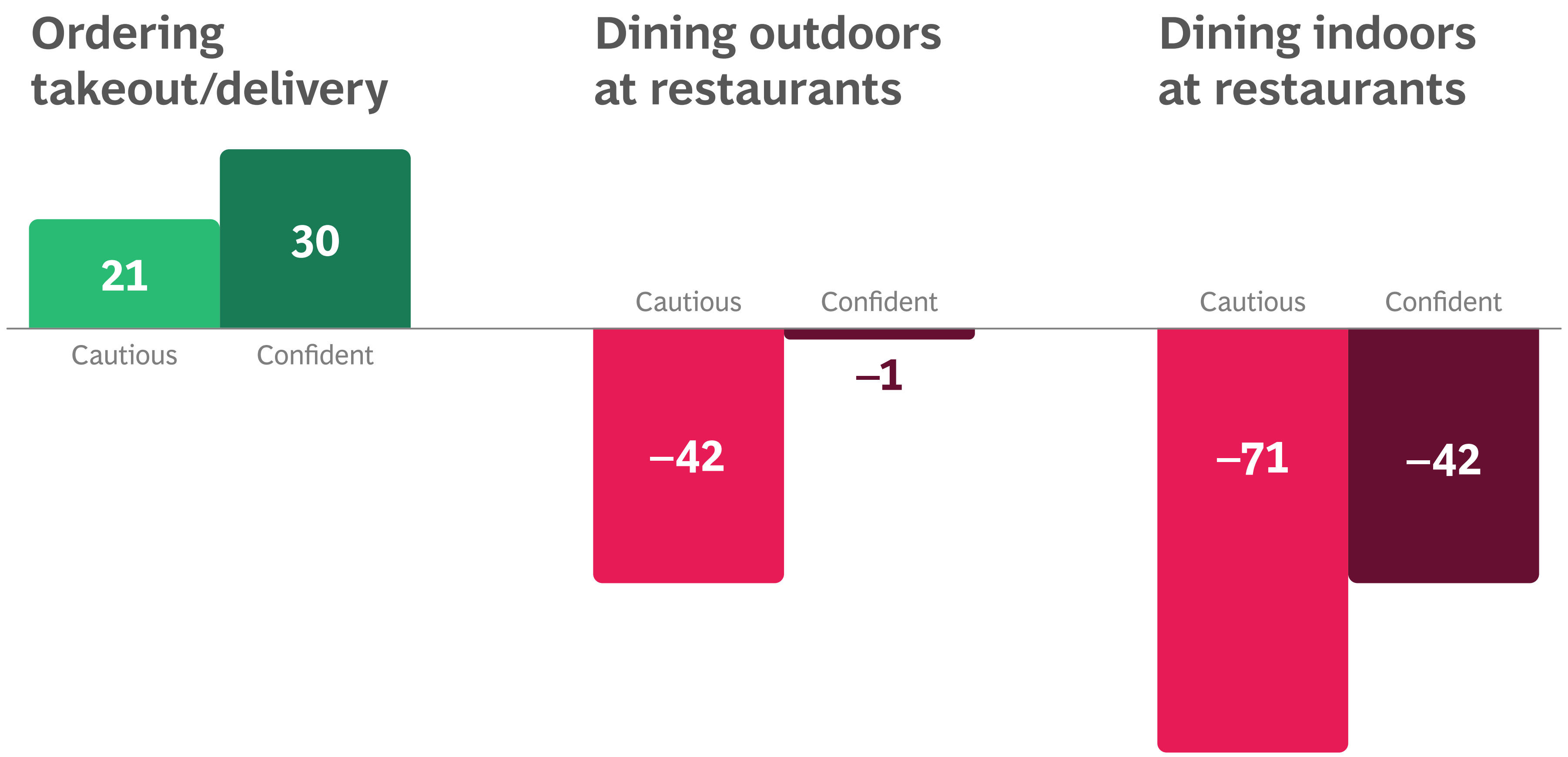
Bought sooner than planned

Bought but had not planned to

Source: BCG COVID-19 Consumer Sentiment Survey, May 20–23, 2021 (n = 4,558, unweighted, representative within ~3 percentage points of the US census).
Note: Question text: "Did you purchase any of these items between March 2020 and today? Select all that apply." and "How did the timing of this purchase differ from your original plans?"

Overall, Consumers Are Ordering More Takeout/Delivery, Going to Restaurants Less Frequently, and Dining Off-Premises More Often

Net change in consumer's restaurant habits today vs. before COVID-19 (%)



Top measures needed to comfortably return to restaurant dining

1. Social distancing enforced (e.g., limited number of people, extra spacing)
2. Masks required for all employees
3. Hand sanitizer (e.g., bottles for public use)

58% of respondents ordered restaurant takeout/delivery online during COVID-19[1]

...with **45%** them ordering online for the first time or in a new way[2]

~20% expect to keep ordering online more post-COVID-19 than they did pre-COVID-19

Source: BCG COVID-19 Consumer Sentiment Survey, May 20–23, 2021 (n = 4,558, unweighted, representative within ~3 percentage points of the US census).
Note: Question text: "Which of the following best describes how much you are doing each of the following activities today compared to before the COVID-19 pandemic?" and "Which of the following measures would be needed for you to feel as comfortable dining at restaurants as you were pre-COVID-19? Select any that you'd require." and "Have you bought any of the following items or categories online since the start of the COVID-19 pandemic?" and "Did you buy any of these online for the first time during the COVID-19 pandemic?" and "Think ahead to 2022, after the pandemic is fully over. How do you expect your online spend to change compared to before the COVID-19 pandemic (i.e., 2019)?" "Net change" is the difference between the percentage of respondents who are doing more restaurant activities and the percentage of respondents who are doing fewer restaurant activities. "Cautious" applies to those who try not to leave home, who attend outdoor gatherings only, or who always wear masks when attending indoor gatherings. "Confident" applies to those who attend indoor gatherings without masks. The graph excludes "Not applicable" data ("Ordering Takeout/delivery": cautious 7%, confident 13%; "Dining outdoor restaurants": cautious 19%, confident 22%; "Dining indoor restaurants": cautious 3%, confident 2%).
[1] Through an establishment's own app or website, or through a third-party delivery service's app or website. [2] The 45% figure consists of 34% who ordered online for the first time and 11% who ordered online in a new way (e.g., directly from a restaurant or through a third-party app).

In addition to increasing their use of takeout and delivery, consumers are dining less frequently at restaurants and more frequently off-premises (takeout or delivery). Longer term, consumers anticipate a return to pre-COVID-19 dining patterns, with only a slight shift away from in-restaurant dining (from 17% to 15%) due to a likely slight increase in consumers' tendency to cook their own meals, use prepared/packaged food, or take advantage of takeout and delivery options.

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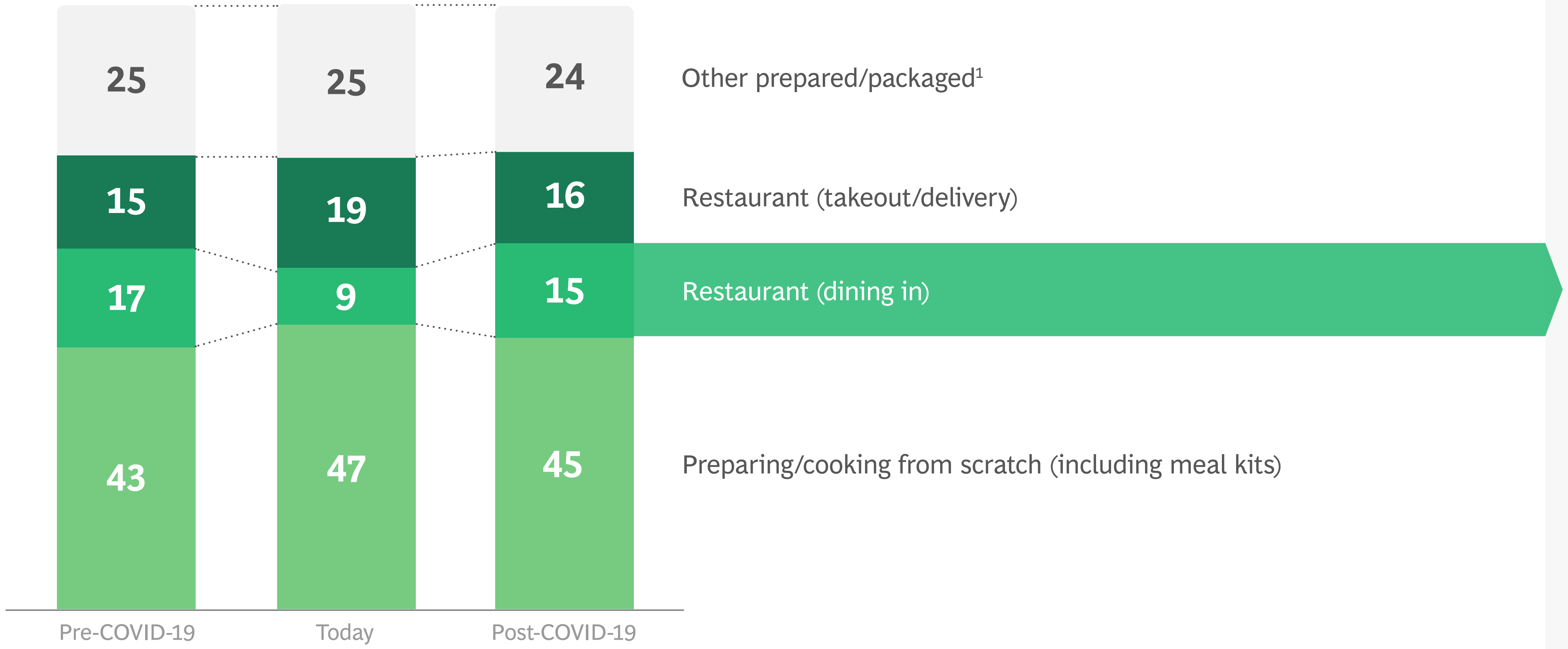
Consumers Expect to Return to Their Pre-COVID-19 Dining Patterns, with a Slight Shift Away from In-Restaurant Dining

Consumer-estimated breakdown of meal and snacking occasions (%)



Top reasons for more restaurant dining

1. Opportunity to go out/socialize with others
2. Supporting local restaurants
3. Making up for lost time (when I didn't/couldn't eat at restaurants during the COVID-19 pandemic)

Top reasons for less restaurant dining

1. High prices
2. Worried about catching a virus at restaurants (e.g., COVID-19)
3. Healthiness of the food

Source: BCG COVID-19 Consumer Sentiment Survey, May 20–23, 2021 (n = 4,558, unweighted, representative within ~3 percentage points of the US census).
Note: Question text: "In a typical week, how are your meal and snack occasions broken down? Please answer for the time periods pre-COVID-19 pandemic, today, and expectations post-COVID-19 pandemic?" and "What are the main reasons you want to do more restaurant dining post-COVID-19 vs. pre-COVID-19?" and "What are the main reasons you want to do less dining in a restaurant post-COVID-19 vs. pre-COVID-19?"
[1] "Other prepared/packaged" includes prepared food from a grocery store, food from a convenience store, prepackaged/frozen food, and other.

CARPE DIEM: LEISURE TRAVEL

Consumer concerns about leisure and travel activities continue. Among travel options, staying at a hotel or flying domestically create the least concern while international travel and cruising generate the most. Consumers still travel far less today than they did before COVID-19, but a large portion of consumers say that they now appreciate traveling more (41%).[2] This will likely translate into a temporary uptick in leisure travel as we move into recovery, as an incremental 5% of consumers say that they plan to increase their travel in the short term.[3] It may also result in a slightly higher steady state for leisure travel post-COVID-19, with an incremental 2% of consumers planning to permanently increase their travel over pre-pandemic levels.[4] The desire to travel reflects an interest in “socializing with family and friends,” as well as a desire to “seize the day”—to live now because “life is short” and to “make up for lost time.”

2. This is a net percentage, computed by subtracting those who appreciate travel less from those who appreciate travel more. 3. This is a net percentage, computed by subtracting those who plan to decrease their leisure travel in the short term from those who plan to increase their leisure travel in the short term. 4. This is a net percentage, computed by subtracting those who plan to decrease their leisure travel permanently from those who plan to increase their leisure travel permanently.

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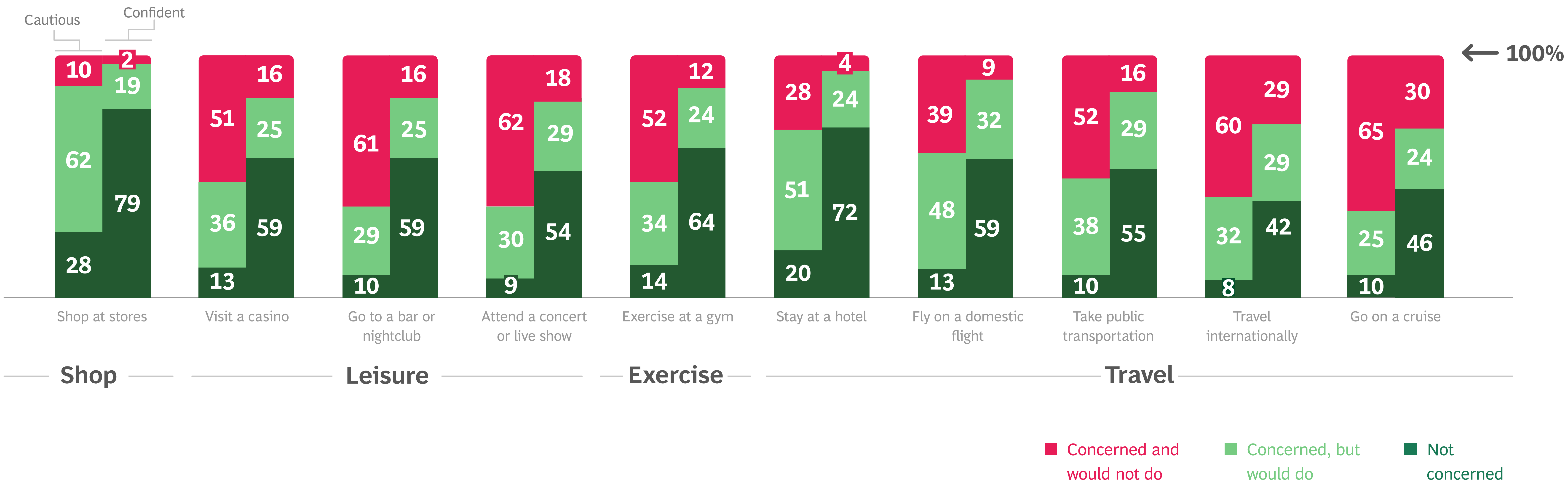
Cautious Consumers Are Unwilling to Participate in Many Leisure and Travel Activities, While Confident Consumers Are Reengaging in Them

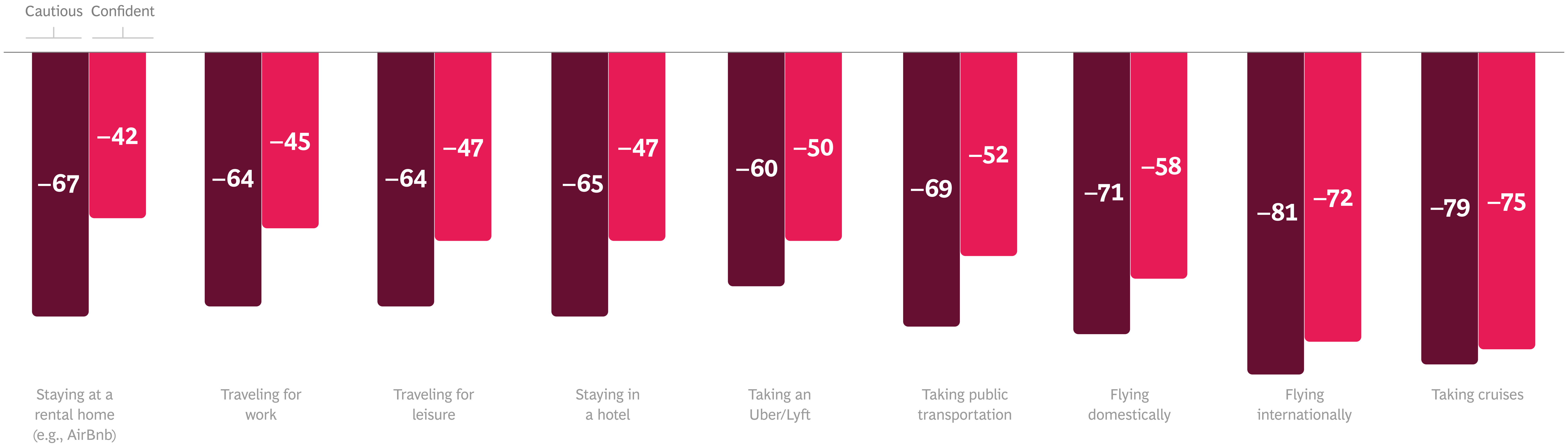
Level of concern with participating in activities today (% of respondents)



Source: BCG COVID-19 Consumer Sentiment Survey, May 20–23, 2021 (n = 4,558, unweighted, representative within ~3 percentage points of the US census).
Note: Question text: "How concerned would you be about doing any of the following today?" and "Which of these options best describes your current comfort level in returning to pre-COVID-19 activities?" "Cautious" applies to those who try not to leave home, who attend outdoor gatherings only, or who always wear masks when attending indoor gatherings. "Confident" applies to those who attend indoor gatherings without masks. Respondents who would never do the specified activity or who selected "Not applicable" are excluded from the graphed results. Because of rounding, not all column totals add up to 100%.

Overall, Whether They Tend to Be Confident or Cautious, Consumers Are Traveling Much Less Frequently Today Than They Did Pre-COVID-19

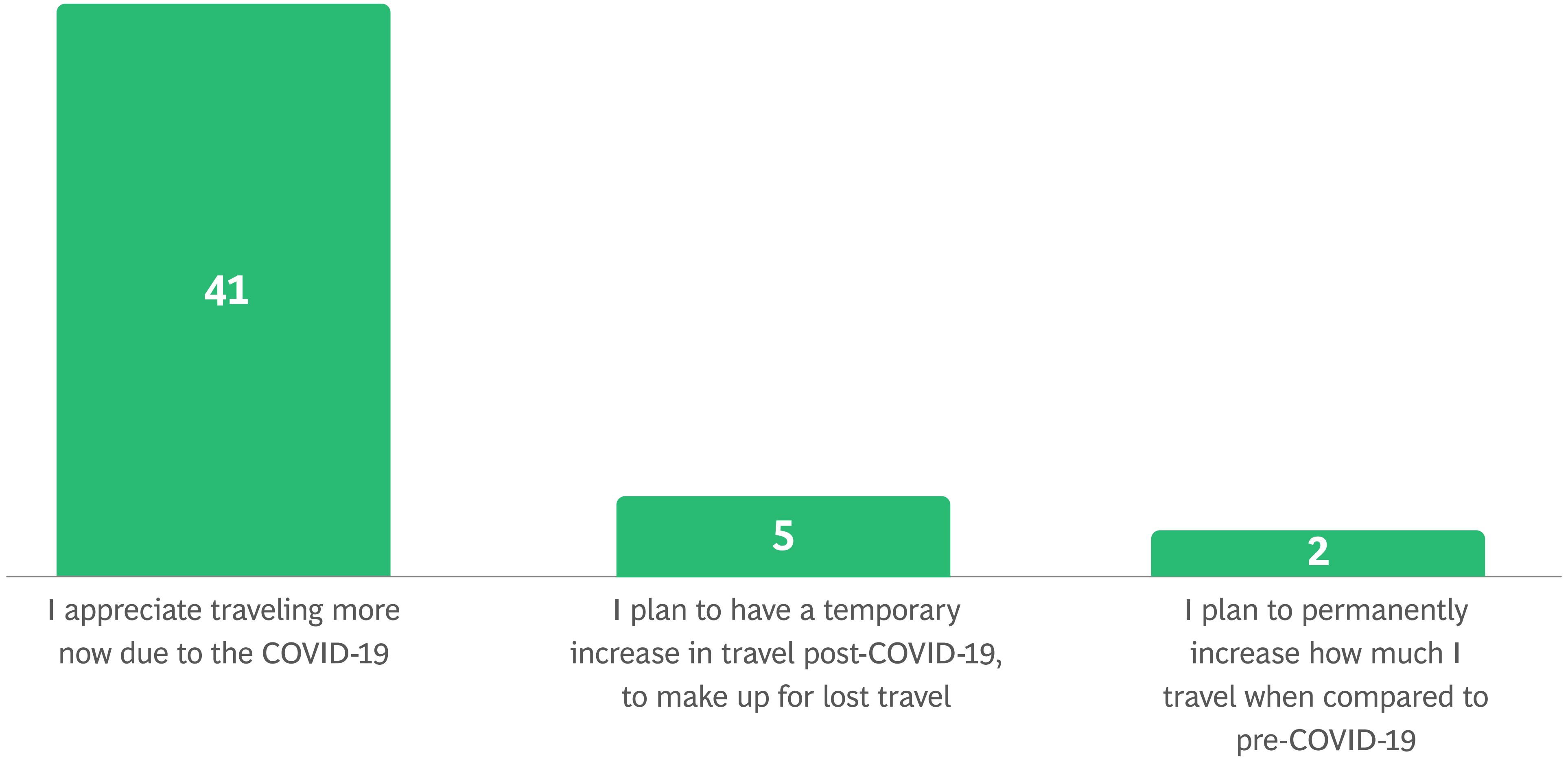
Net change in consumer's travel habits today vs. before COVID-19 (%)



Source: BCG COVID-19 Consumer Sentiment Survey, May 20–23, 2021 (n = 4,558, unweighted, representative within ~3 percentage points of the US census).
Note: Question text: "Which of the following best describes how much you are doing each of the following activities today compared to before the COVID-19 pandemic?" and "Which of these options best describes your current comfort level in returning to pre-COVID-19 activities?" "Net change" is the difference between the percentage of respondents who are doing more travel activities and the percentage of respondents who are doing fewer travel activities. "Cautious" applies to those who try not to leave home, who attend outdoor gatherings only, or who always wear masks when attending indoor gatherings. "Confident" applies to those who attend indoor gatherings without masks. The graphs above do not include "Not applicable" data.

Consumers' Appreciation for Travel Has Increased as the Pandemic Wanes, in Part from a Desire to See Others and in Part to Make Up for Lost Time

Net agreement with statements related to traveling over the next 6 months (%)



Why consumers want to do more leisure travel

1. Opportunity to socialize with friends/family
2. A sense that life is too short
3. Making up for lost time

Why consumers want to do less leisure travel

1. Worried about getting stuck away from home
2. Worried about catching a virus (e.g., COVID-19)

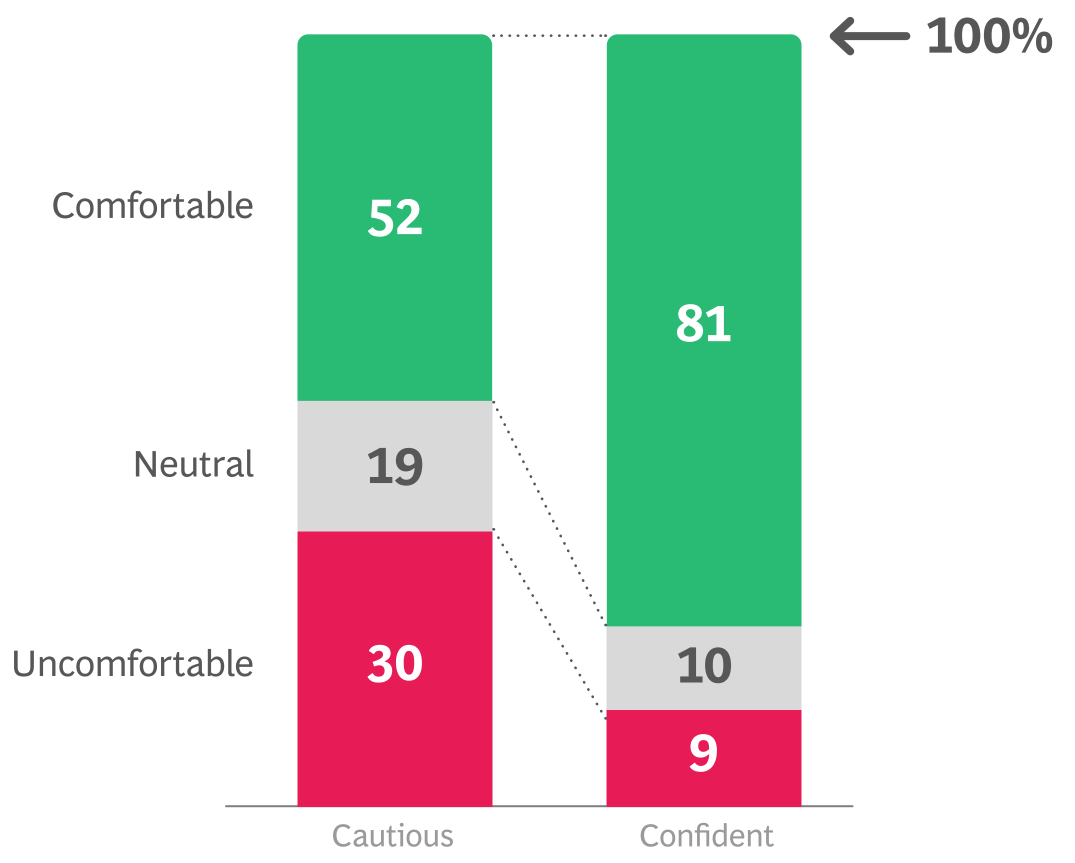
Source: BCG COVID-19 Consumer Sentiment Survey, May 20–23, 2021 (n = 4,558, unweighted, representative within ~3 percentage points of the US census).
Note: Question text: "Which of the following statements best describe your anticipated travel habits and attitudes over the next 6 months?" and "What are the main reasons you plan to do more leisure travel post-COVID-19 vs. pre-COVID-19?" and "What are the main reasons you plan to do less leisure travel post-COVID-19 vs. pre-COVID-19?" "Net agreement" is the difference between the percentage of respondents who agree the with statement and the percentage of respondents who disagree with the statement. The graph above does not include data for respondents who answered "Not applicable" (appreciate travel more 7%, temporary increase in travel 9%, permanently Increase travel 8%).

LESSONS LEARNED: WORK AND SCHOOL

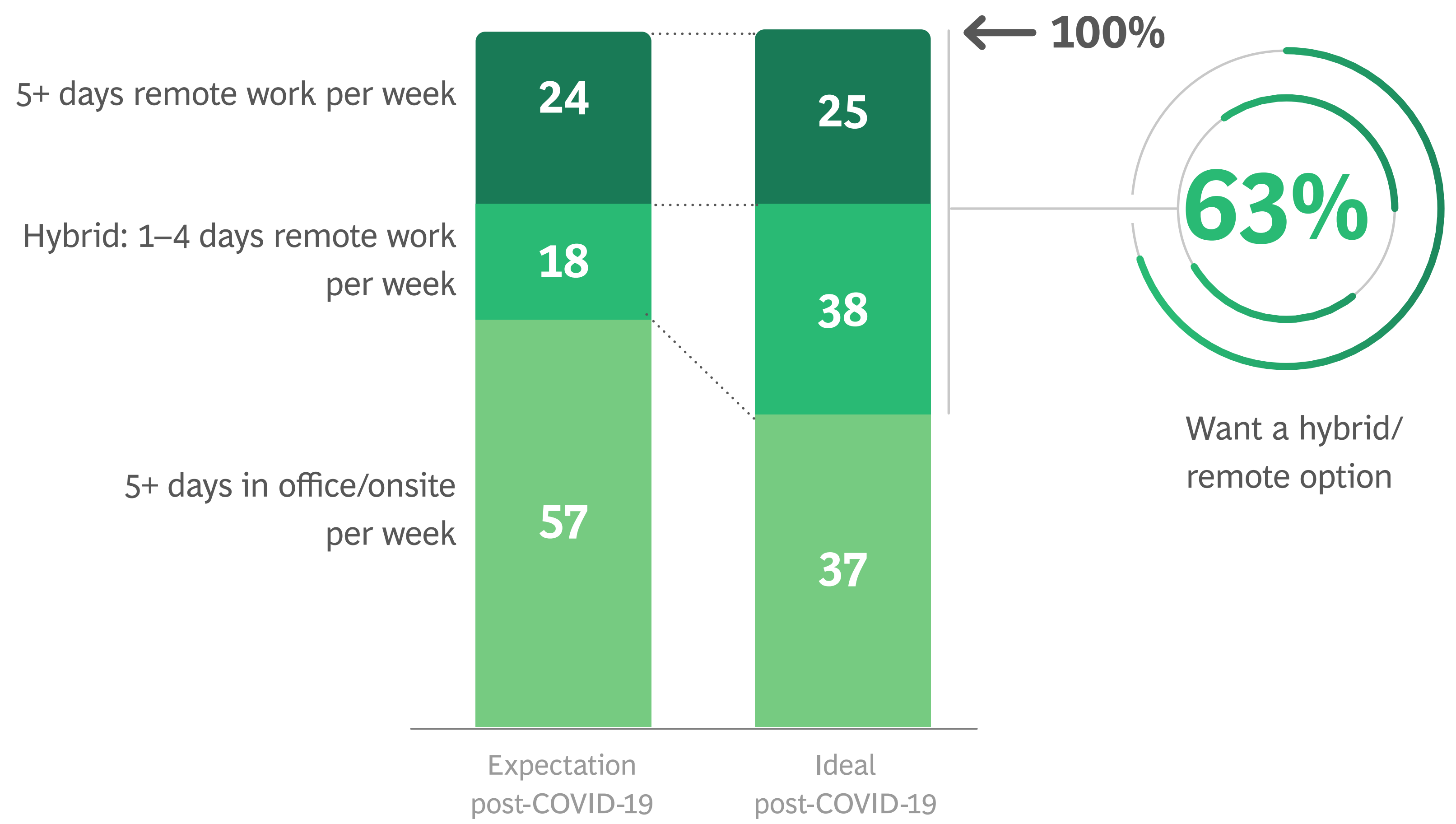
As America reopens, many consumers are looking toward returning to work and school. Although majorities of both cautious and confident consumers now feel comfortable about working onsite, most would prefer a hybrid or remote work model going forward. At the same time, more consumers say that they would prefer a hybrid or remote model than expect to be offered one. Overall, survey participants anticipate a long-term shift to more hybrid and remote work, with digital occupations seeing the most significant shift toward hybrid and remote working models.

Most Consumers Are Comfortable Working Onsite Now, but More of Them Would Prefer a Hybrid Work Model Than Expect to Be Offered One

Comfort with working in an office/onsite in person (%)



Expectation vs. ideal/preferred working situation post-COVID-19 (%)



Source: BCG COVID-19 Consumer Sentiment Survey, May 20–23, 2021 (n = 4,558, unweighted, representative within ~3 percentage points of the US census).
Note: Question text: "How comfortable are you currently with working in an office/onsite in-person?" and "Which of the following best describes where you worked pre-COVID-19, today, and expectation post-COVID-19?" and "What would be your ideal/preferred working situation post-COVID-19 (i.e., 2022 onward)?" and "Which of these options best describes your current comfort level in returning to pre-COVID-19 activities?" "Cautious" applies to those who try not to leave home, who attend outdoor gatherings only, or who always wear masks when attending indoor gatherings. "Confident" applies to those who attend indoor gatherings without masks. The graph for expected working situation post-COVID-19 excludes the 15% who answered "Do not know yet." Because of rounding, not all column totals add up to 100%.

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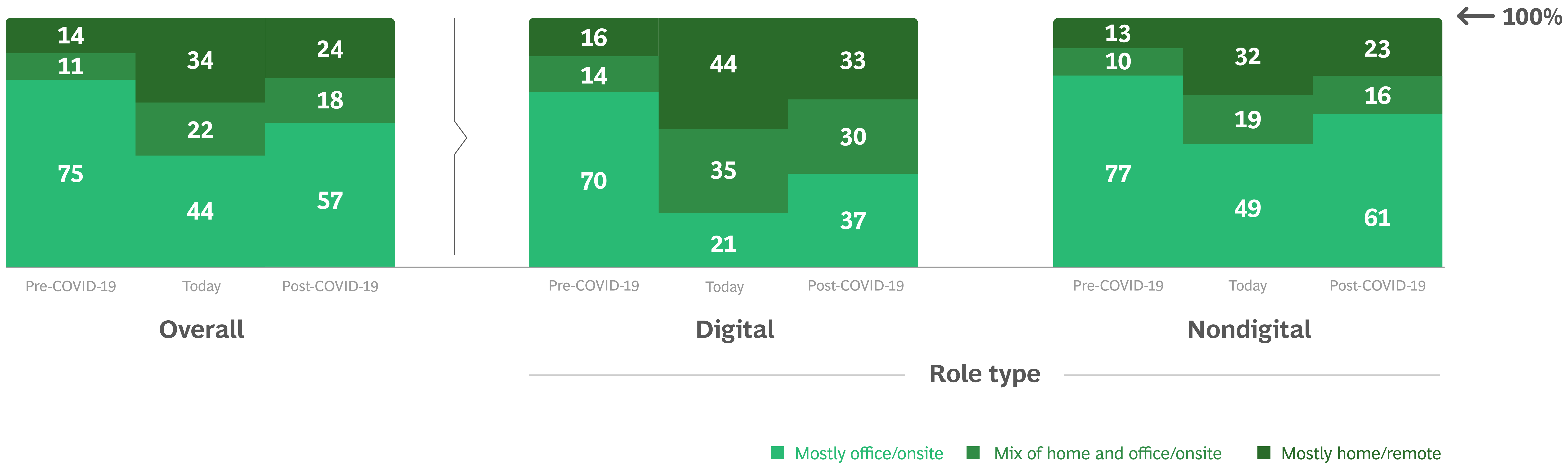
Survey Respondents—Especially Digital Employees—Anticipate a Long-Term Shift to Remote/Hybrid Work

Work location pre-COVID-19, today, and expected post-COVID-19 (%)



Source: BCG COVID-19 Consumer Sentiment Survey, May 20–23, 2021 (n = 4,558, unweighted, representative within ~3 percentage points of the US census).
Note: Question text: "Which of the following best describes where you worked pre-COVID-19, today, and expectation post-COVID-19?" "Digital" includes data scientist/data analyst/computer scientist, IT, and technology/digital. "Nondigital" includes finance/accounting, human resources, legal/compliance/risk management, marketing, customer support, manufacturing/operations, supply chain, clerical administration, facilities, research and development, health care provider, public relations, sales, teacher, executive, and consultant. The graphs exclude "Do not know yet" data for post-COVID-19 expectation (overall 13%, digital 15%, and nondigital 13%).

There is also a difference in parents' comfort level with sending their children back to school in person. Approximately half of cautious parents say that they are comfortable with sending their children back versus 82% of confident parents. Cautious parents also have a higher threshold for the level of vaccinations necessary to make them feel comfortable with resuming in-person schooling: 35% of parents who want to see a higher vaccination rate before they can feel comfortable with in-person schooling put the required vaccination rate at 90% to 100%, whereas only 21% require similar numbers in order to feel comfortable with attending large indoor events themselves. Nevertheless, parents' opinions about the best mix of live and remote schooling largely align with their expectation of reality in the fall.

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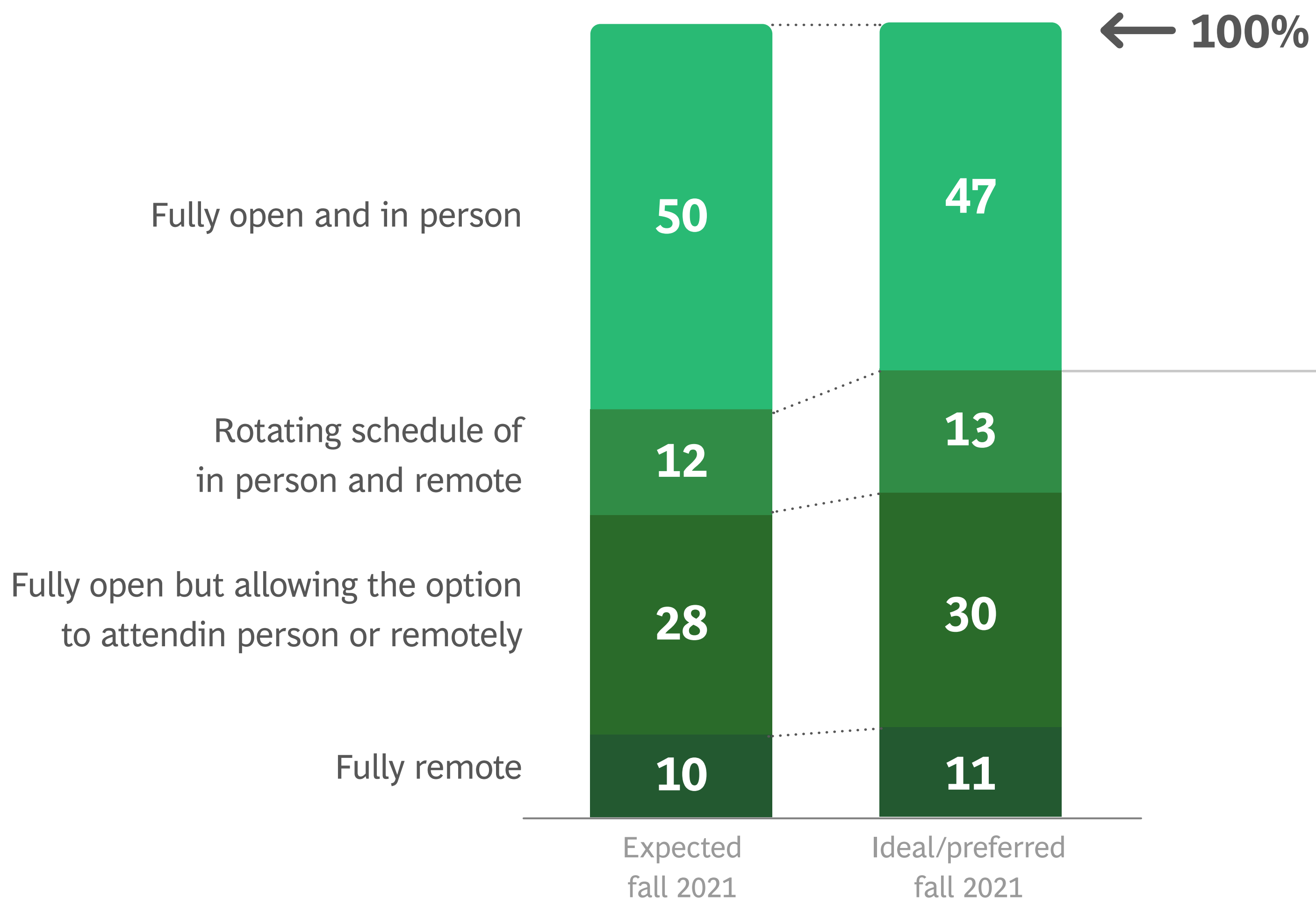
Looking Ahead to the New School Year, Most Parents Think Their Schooling Preferences Will Align with the Reality They Expect in the Fall

Expected and ideal child schooling in fall 2021
(% of respondents)



Why parents want their child in person

1. "It's best for my child's education"
2. "It's best for my child's social development"
3. "It's best for my child's happiness"

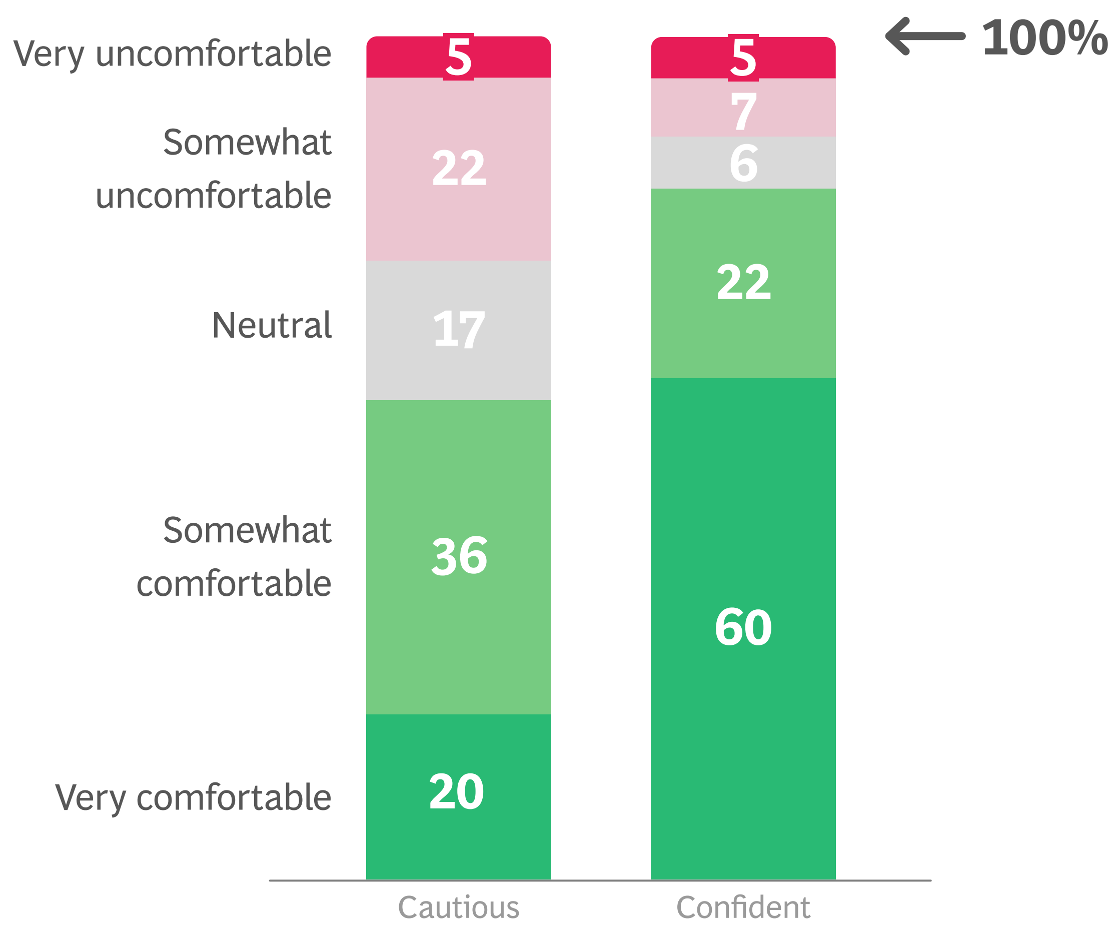
Why parents want their child remote[1]

1. "It's best for my child's safety"
2. "It's best for my child's education"

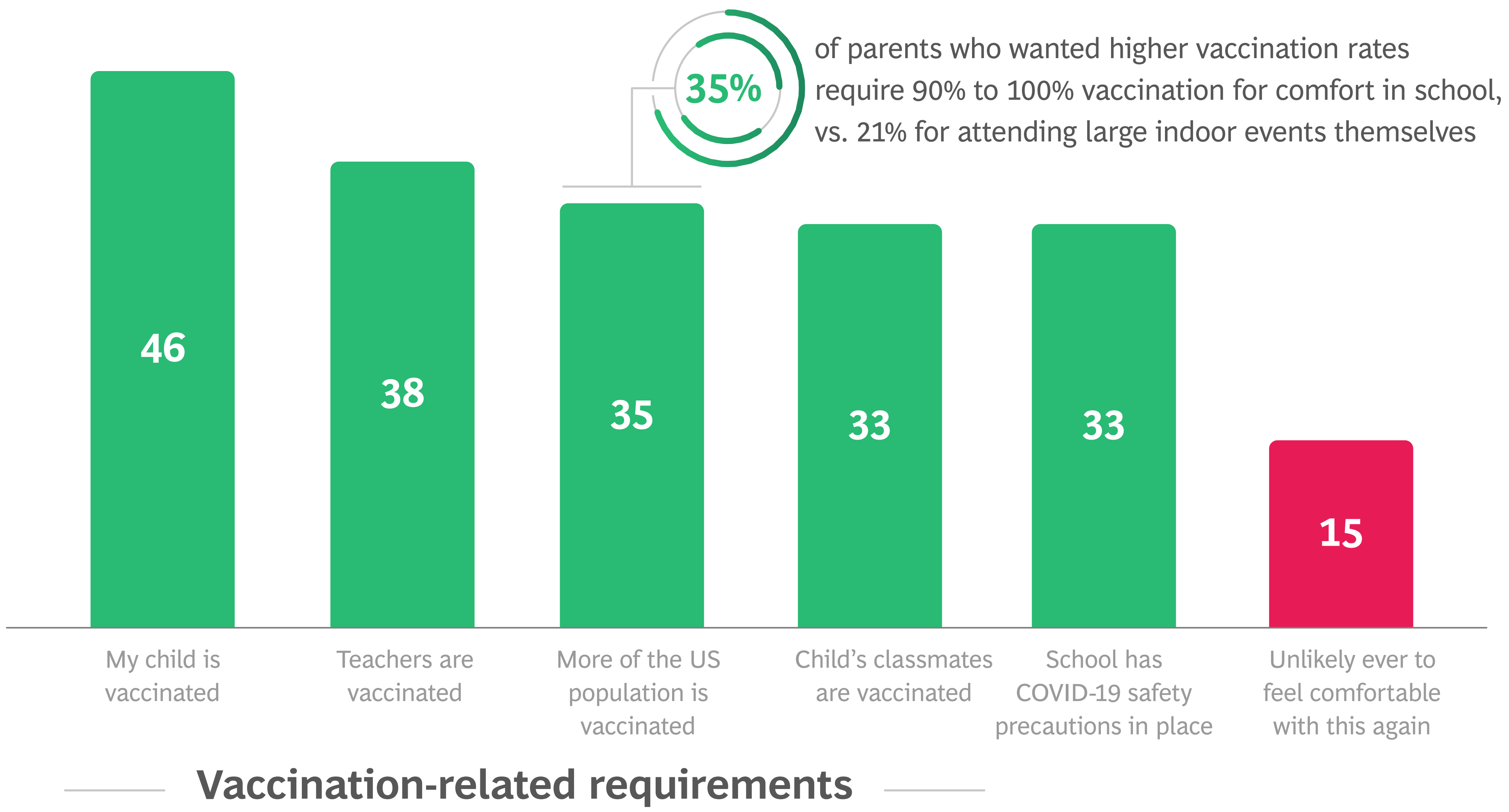
Source: BCG COVID-19 Consumer Sentiment Survey, May 20–23, 2021 (n = 4,558, unweighted, representative within ~3 percentage points of the US census).
Note: Question text: "What is your expectation for this child's school/childcare in fall 2021?" and "What would be your ideal/preferred situation for this child in fall 2021?" and "Why is this your ideal/preferred situation?" These questions were asked only of parents of children less than 18 years old.
[1] Including parents whose preference was for partially remote schooling. Because of rounding, not all column totals add up to 100%.

Parents Differ on Level of Comfort with Children Attending School in Person and on the Level of Vaccination Needed to Regain Pre-COVID-19 Comfort

Parent's current comfort level with sending child to school in person (% of respondents)[1]



Parent's requirements for being fully comfortable with child attending school in person (% of respondents)[2]



Source: BCG COVID-19 Consumer Sentiment Survey, May 20–23, 2021 (n = 4,558, unweighted, representative within ~3 percentage points of the US census).
Note: Question text: "How comfortable are you with your child currently attending school or childcare in person?" and "What would it take for you to return to your pre-COVID-19 comfort level when thinking about sending your child to school or childcare in person?" and "What level of vaccination of the US population would be needed for you to feel as comfortable sending your child to school or childcare in person as you were pre-COVID-19?" and "Which of these options best describes your current comfort level in returning to pre-COVID-19 activities?" "Cautious" applies to those who try not to leave home, who attend outdoor gatherings only, or who always wear masks when attending indoor gatherings. "Confident" applies to those who attend indoor gatherings without masks.
[1] Excludes "Not applicable" data (cautious 1%, confident 0%). [2] Excludes the 7% of respondents who are currently remote but are already comfortable with sending their child back in person.

FAST-FORWARD TO THE NEXT STAGE

Looking ahead to the end of the pandemic, a significant percentage of consumers today, particularly among those in the cautious camp, say that they would like to see many safety measures implemented during COVID-19 continue in its aftermath—for example, masks in Ubers/Lyfts/taxis, airplanes, public transportation, gyms, and restaurants; Plexiglas dividers at checkouts and counters; and social distancing at work. If the pandemic continues to wane and comfort and confidence in engaging in activities continue to grow, however, we anticipate that consumer sentiment in favor of continuing such safety measures will fade as, hopefully, the pandemic begins to recede into history.

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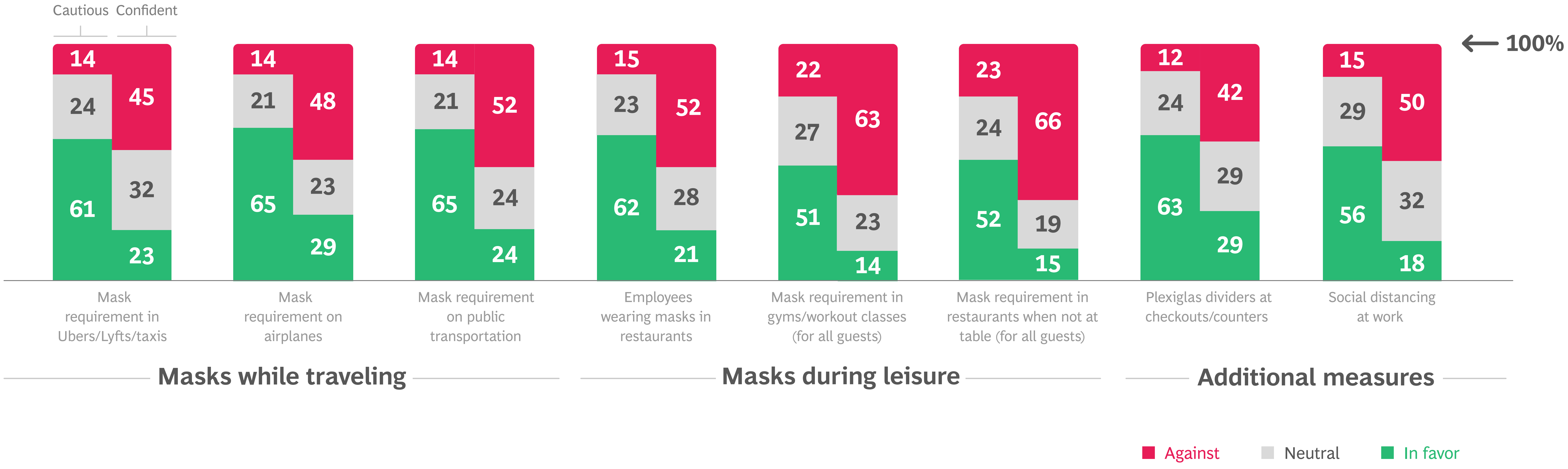
Cautious and Confident Consumers Differ Significantly on Whether Various Safety Measures Should Continue When the Pandemic Is Over

Agreement with practices to continue when the COVID-19 pandemic is over (%)



Source: BCG COVID-19 Consumer Sentiment Survey, May 20–23, 2021 (n = 4,558, unweighted, representative within ~3 percentage points of the US census).
Note: Question text: “Which of the following practices would you like to see continued after the COVID-19 pandemic is fully over?” and “Which of these options best describes your current comfort level in returning to pre-COVID-19 activities?” “Cautious” applies to those who try not to leave home, who attend outdoor gatherings only, or who always wear masks when attending indoor gatherings. “Confident” applies to those who attend indoor gatherings without masks. Respondents who would never do the specified activity are excluded from the graphed results. Because of rounding, not all column totals add up to 100%.

ABOUT THE CONSUMER SENTIMENT SERIES

Our series began in March 2020 and includes 12 core weekly articles, 2 special feature articles, and key charts delivered monthly starting in June 2020. The series tracks sentiment and spending changes due to COVID-19.

BCG's Consumer Sentiment series is based on data drawn from an online survey of consumers that has been conducted regularly since early March 2020 across multiple countries worldwide. Each Snapshot highlights a selection of insights from a comprehensive ongoing study that BCG provides to clients. The survey is produced by the authors, who are members of BCG's Center for Customer Insight (CCI), in partnership with coding and sampling provider Dynata, the world's largest first-party data and insights platform. The goal of the research is to provide our clients and businesses around the world with periodic barometer readings of COVID-19-related consumer sentiment and actual and anticipated consumer behavior and spending to inform critical crisis triage activities, as well as rebound planning and decision making. A team composed of BCG consultants and experts from CCI completes the survey analytics.

LEGAL CONTEXT

The situation surrounding COVID-19 is dynamic and rapidly evolving, on a daily basis. This COVID-19 research is not intended to: (i) constitute medical or safety advice, nor be a substitute for the same; nor (ii) be seen as a formal endorsement or recommendation of a particular response. As such you are advised to make your own assessment as to the appropriate course of action to take.

ACKNOWLEDGEMENTS

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