

LOOK FORWARD

The Pandemic's Impact Over the Last Year
and What's Ahead

MARCH 2021



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WORK, KIDS & LEARNING

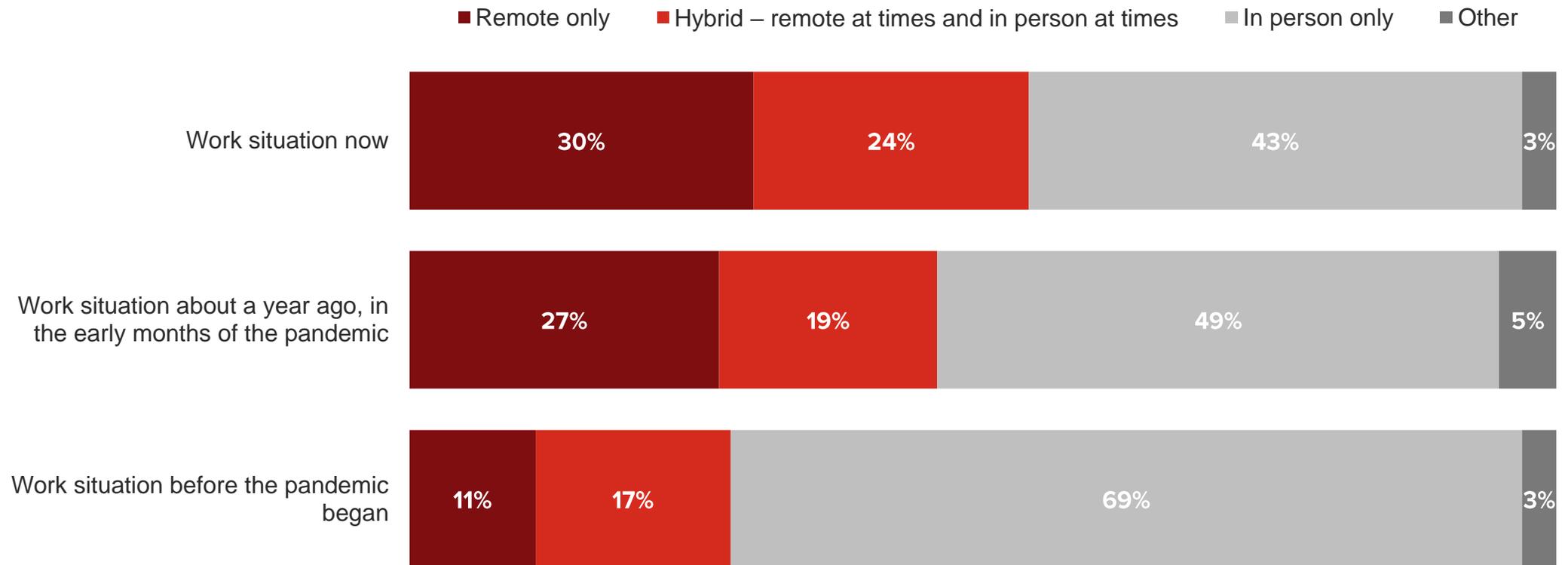
STREAMING, GAMING & STAYING CONNECTED

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LOOK FORWARD

Over half of employed adults say they are currently working at least partially remotely (54%), nearly twice the share who say they were working at least partially remotely before the pandemic began (28%).

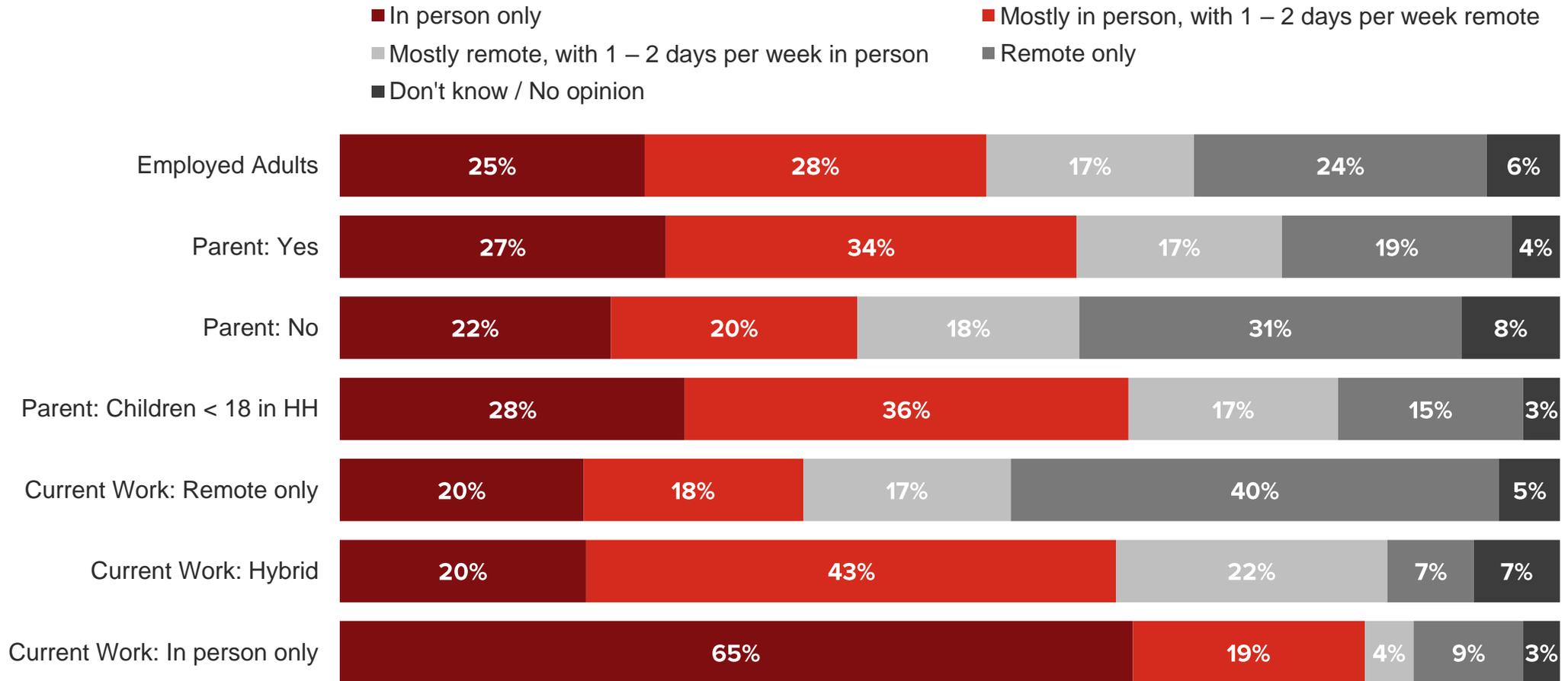
Which of the following best describes your...



METHODOLOGY: This poll was conducted between March 12 – March 14, 2021 among a national sample of 3000 US adults. The interviews were conducted online and the data were weighted to approximate a target sample of adults based on gender, educational attainment, age, race/ethnicity, and region. Results from the full survey have a margin of error of plus or minus 2 percentage points.

Among those who've worked at least partially remotely at some point, about 7 in 10 say they would like to be working remotely at least 1-2 days per week a year from now (69%).

And, thinking about what your work life will look like **a year from now**, how would you prefer to be working?

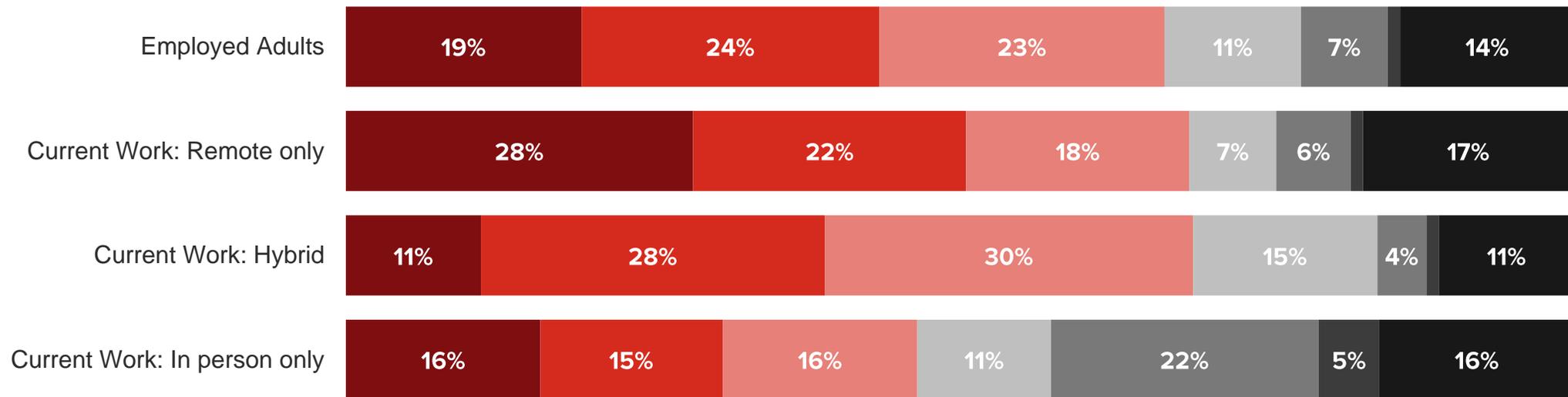


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Nearly 1 in 4 employed adults who have worked remotely in the past say their employer has announced that employees will be able to work fully remotely if they would like (24%), while a nearly equal share (23%) say their employer has announced that employees will be required to work in person at least some days.

Which of the following best describes the guidance your employer has provided about long-term remote work policies for after the pandemic?

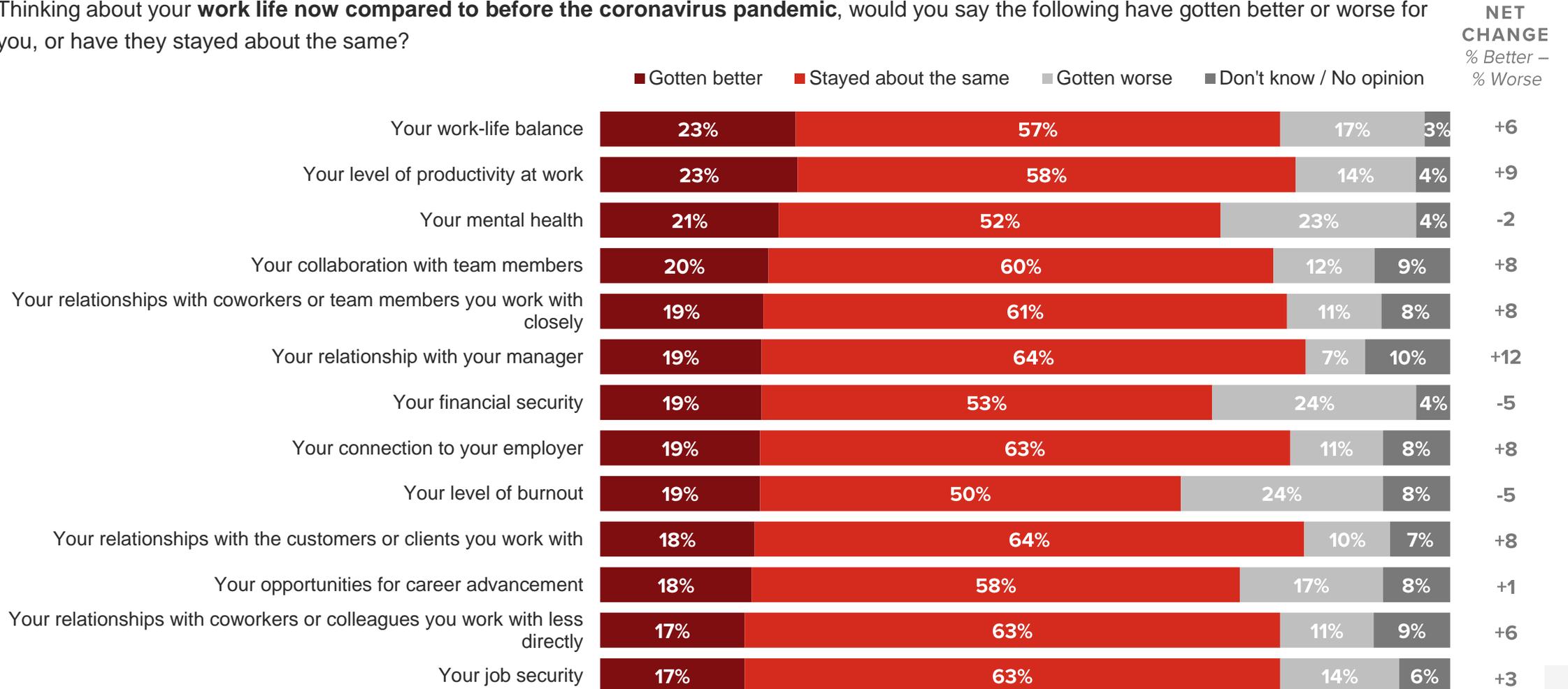
- Employees will be required to work fully remotely
- Employees will be able to work fully remotely if they would like, but will have the option to return in person
- Employees will be required to work in person some days, but will be able to work remotely regularly
- Employees will be required to work mostly in person, but will be able to work remotely when it is necessary
- Employees will be required to work fully in person
- Other
- My employer has not yet provided guidance about long-term remote work policies



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Employed adults largely report that their work life has stayed about the same over the course of the pandemic. Adults are more likely to say their work-life balance and productivity have gotten better than worse. Meanwhile, adults are more likely to say their financial security, mental health, and level of burnout have gotten worse than better.

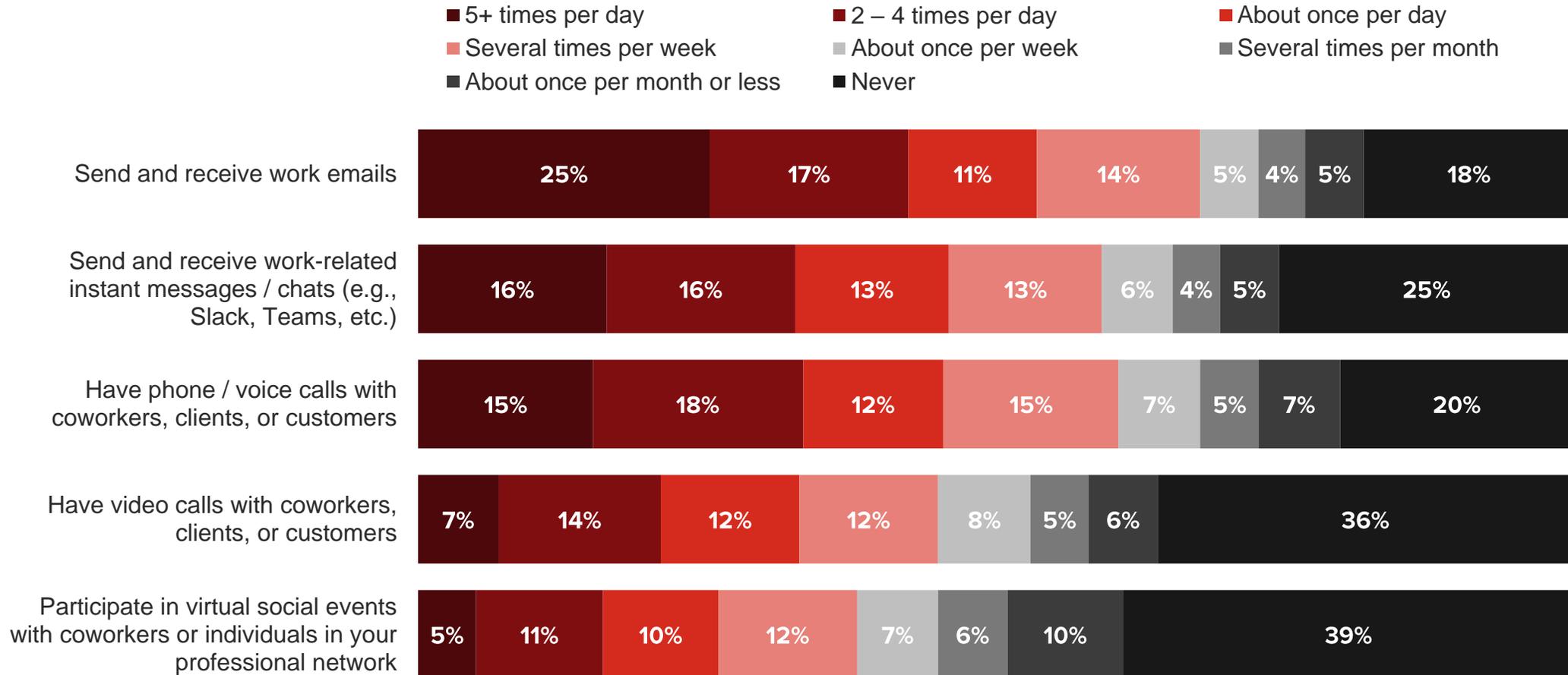
Thinking about your **work life now compared to before the coronavirus pandemic**, would you say the following have gotten better or worse for you, or have they stayed about the same?



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Nearly half of employed adults say they send and receive work-related chats (45%) and have phone calls (45%) at least once per day. 1 in 3 say they have video calls with coworkers, clients, or customers at least once per day (33%).

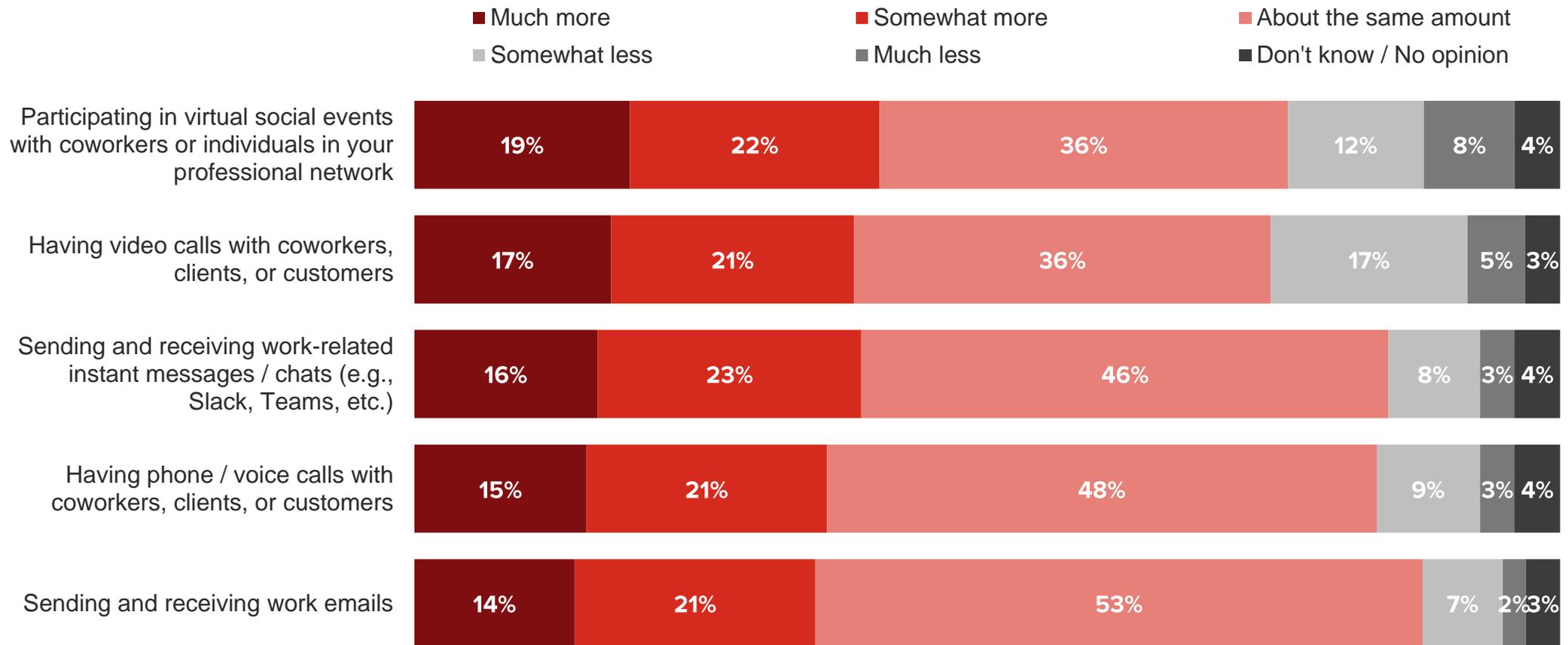
Over the last year, on average, how often would you say you...



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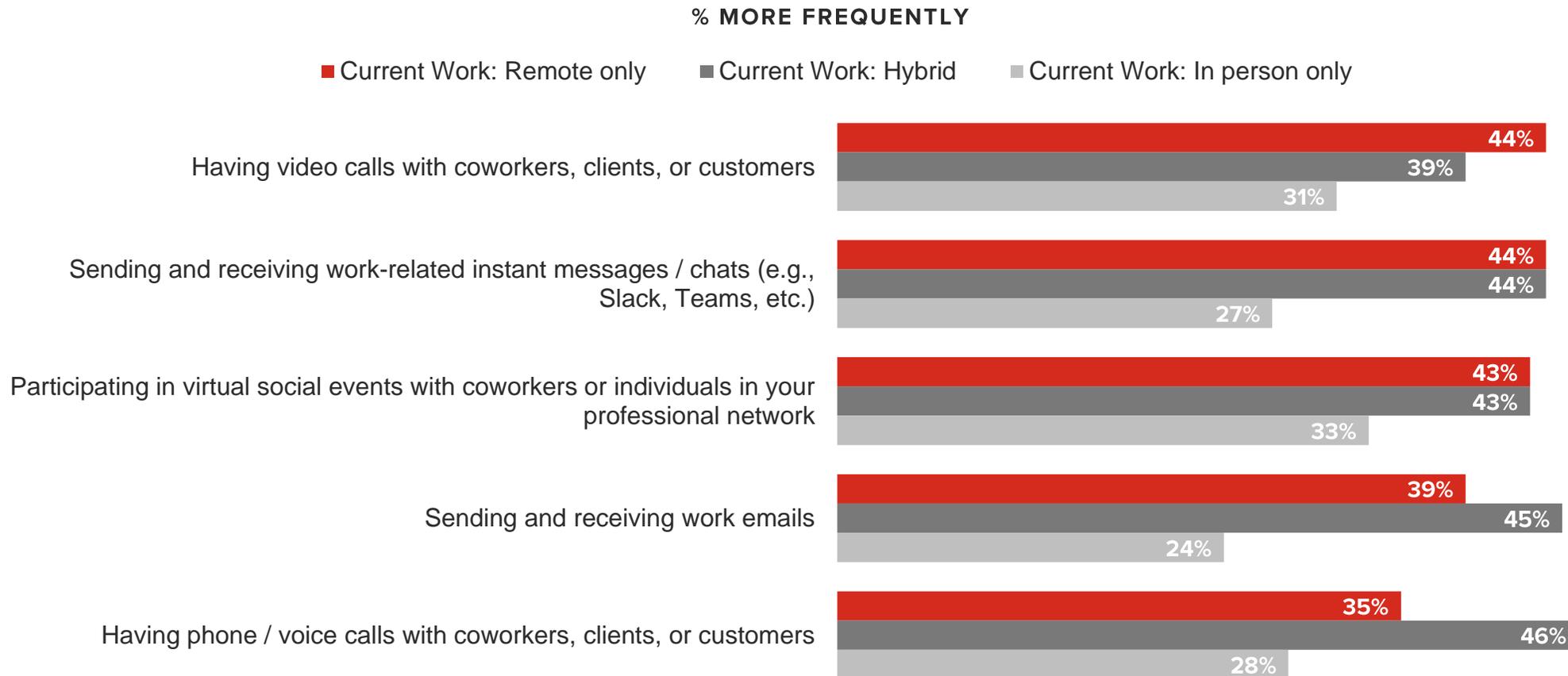
2 in 5 employed adults anticipate they will be participating in virtual social events with coworkers more a year from now than they are now (41%). More than a third say the same when it comes to having video calls with coworkers, clients, or customers (38%).

And, thinking about what your work life will look like **a year from now**, do you anticipate you will be doing each of these more frequently, less frequently, or about the same amount that you are now?



Adults who are currently working at least partially remotely are especially likely to see themselves having video calls and participating in virtual social events more a year from now than they are now.

And, thinking about what your work life will look like **a year from now**, do you anticipate you will be doing each of these more frequently, less frequently, or about the same amount that you are now?



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Remote workers largely say they tend to be more mobile when they're working remotely (75%). 2 in 3 say they plan to take advantage of remote work to travel or work from places other than their home when the pandemic has subsided (67%).

Do you agree or disagree with the following statements?



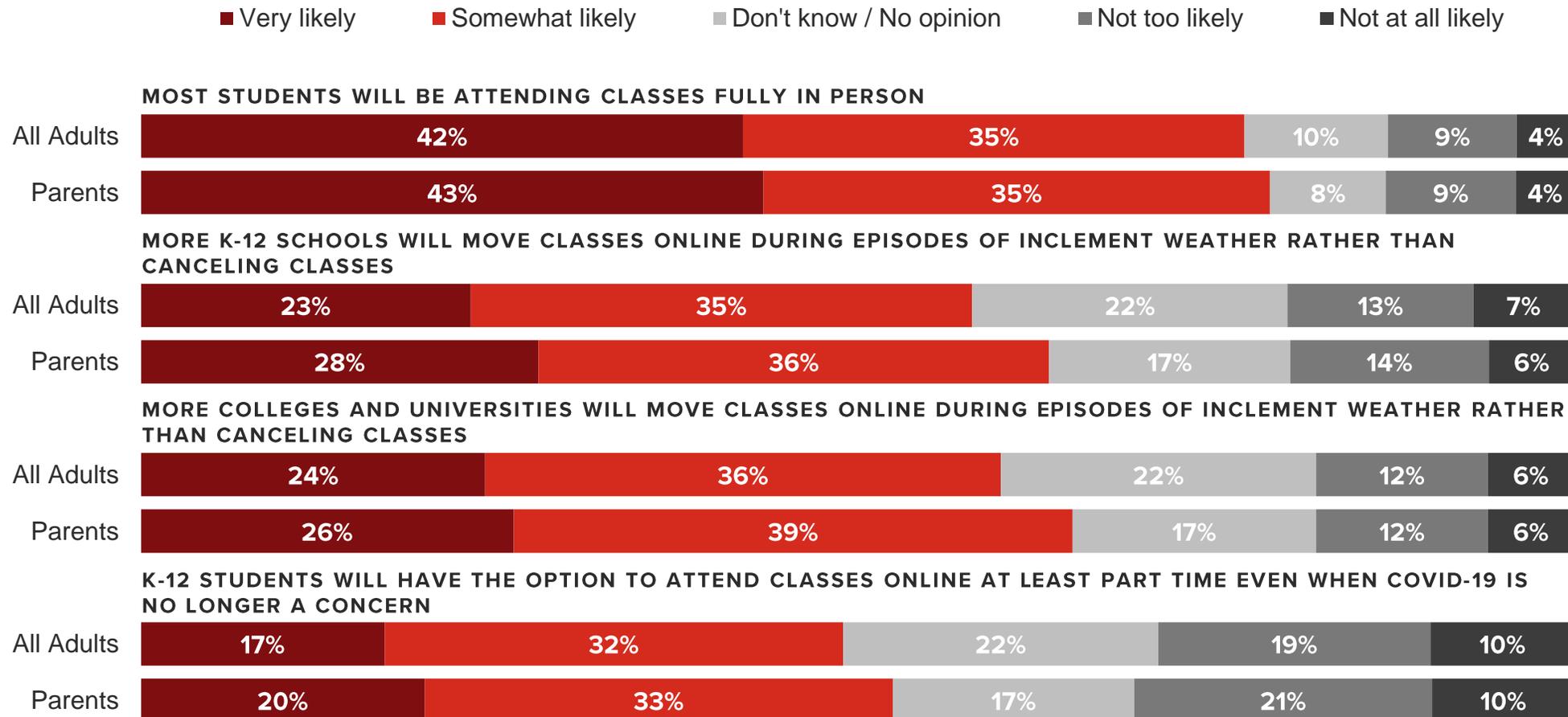
* Among adults currently working fully remote.

** Among adults who have worked remotely at some point.

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While most US adults think students will be attending classes fully in person a year from now, nearly half think it is likely that K-12 students will have *the option* to attend classes online at least part time even when COVID-19 is no longer a concern (49%), including 53% of parents.

Thinking about children's schooling **a year from now**, how likely do you think it is that...





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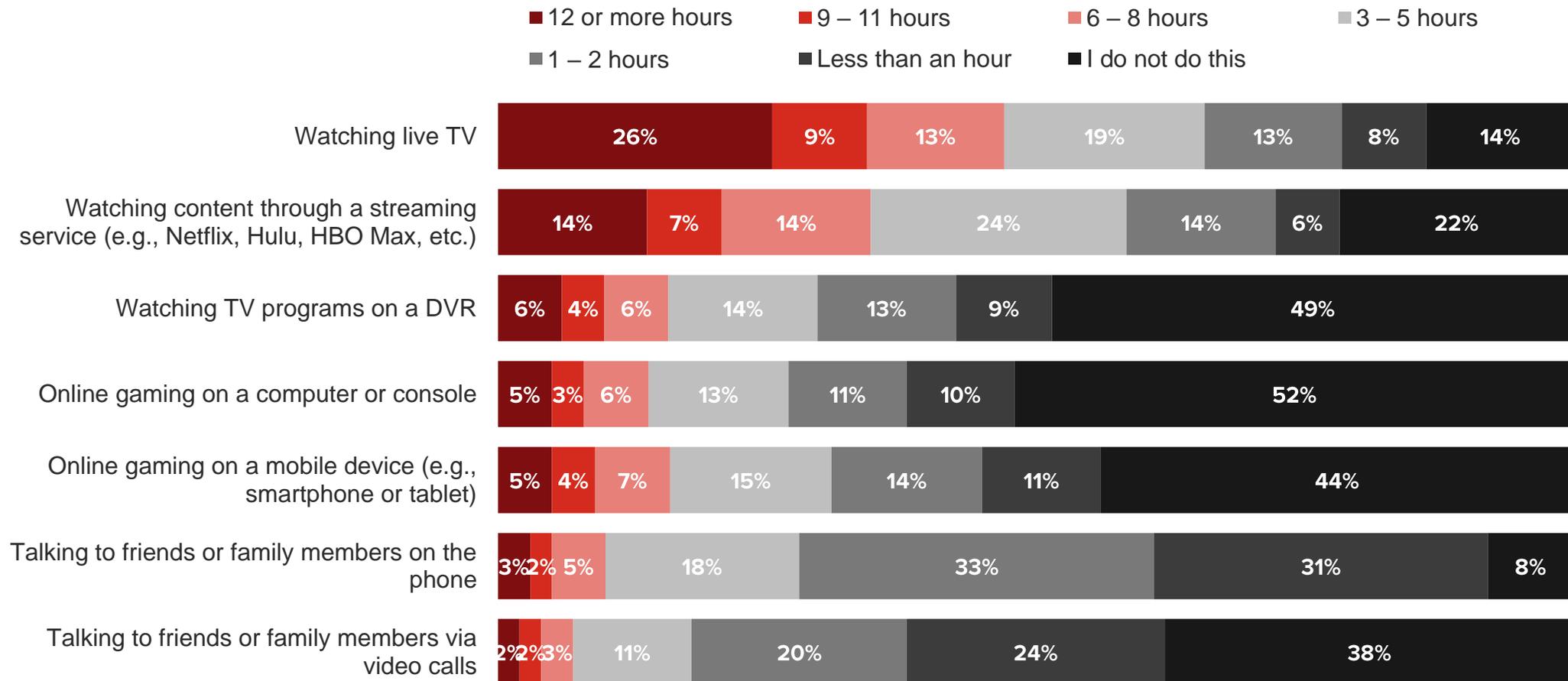
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2 in 3 US adults say that recently, they have been spending at least 3 hours per week watching live TV (67%). More than half (59%) say the same about watching content through a streaming service.

Recently, how much time would you say you've been spending on the following **during an average week**?



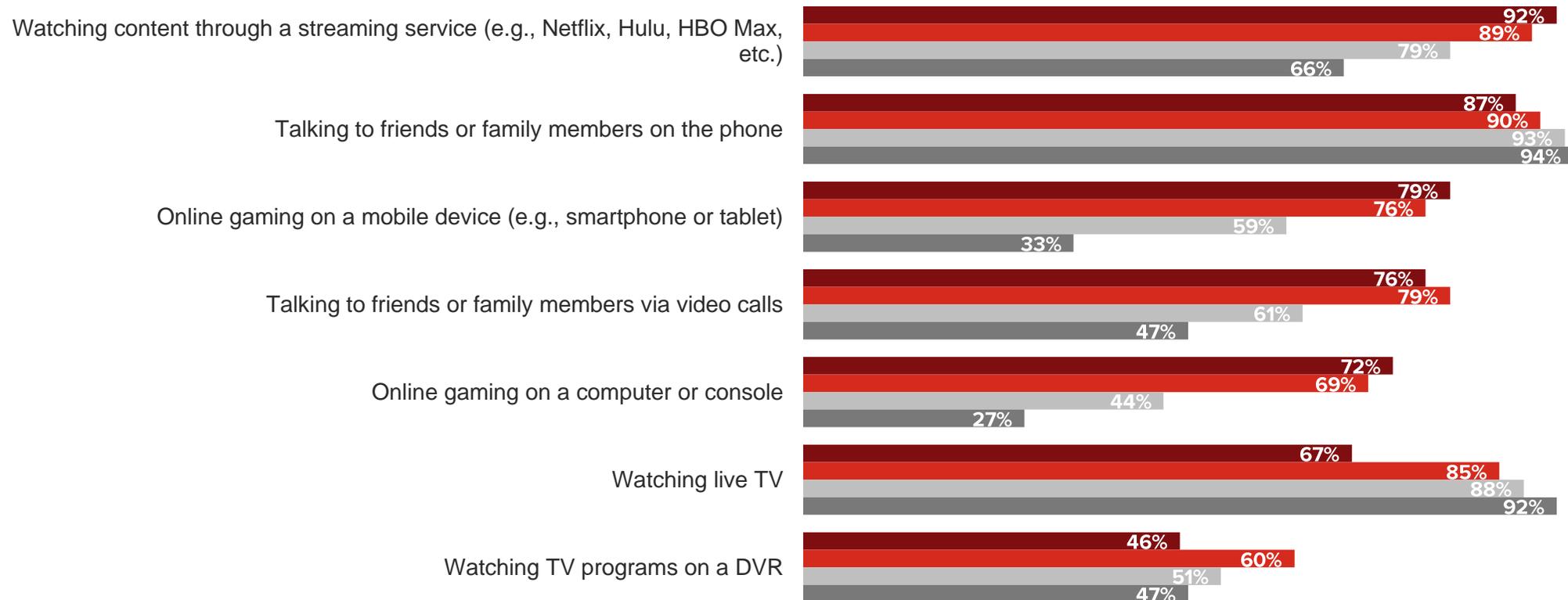
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Gen Zers and Millennials are much more likely to say they spend time playing online games, while Gen Xers and Boomers are more likely than younger generations to say they spend time watching live TV and talking on the phone.

Recently, how much time would you say you've been spending on the following **during an average week**?

% SPEND SOME TIME EACH WEEK DOING ACTIVITY

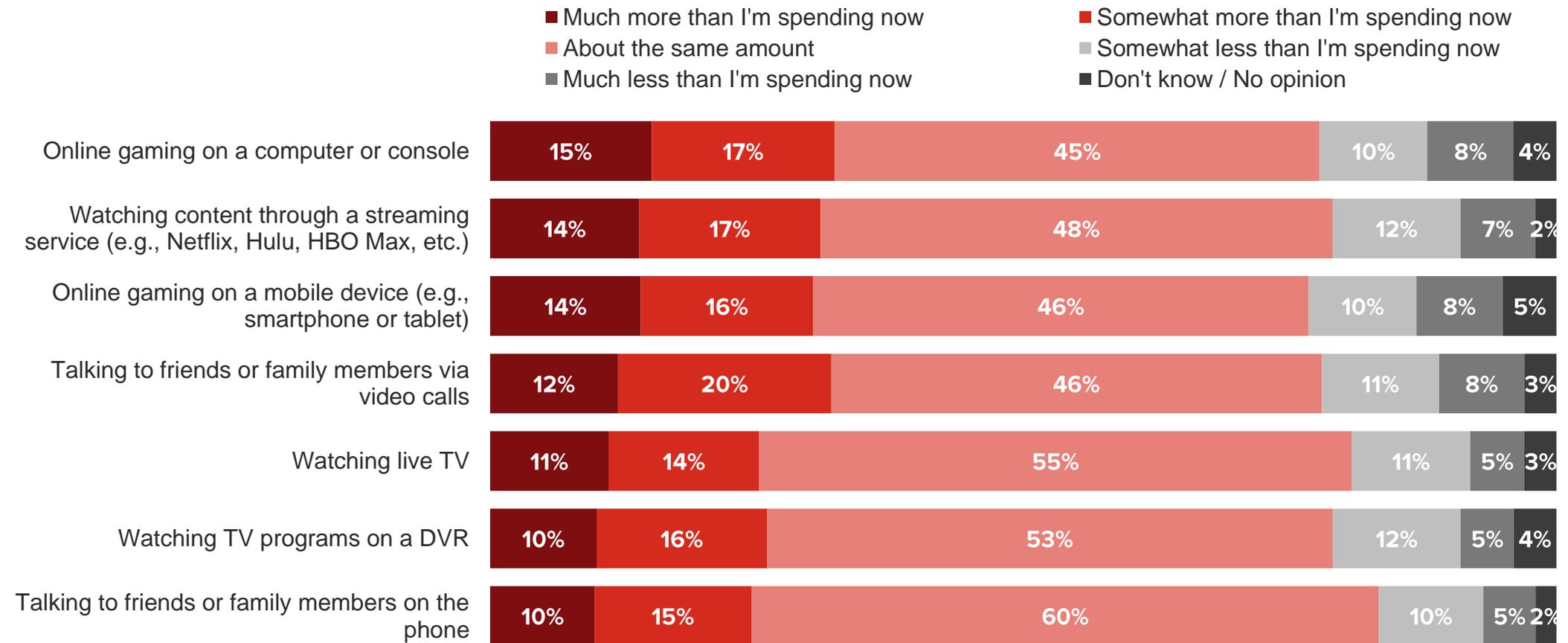
■ GenZers: 1997-2012 ■ Millennials: 1981-1996 ■ GenXers: 1965-1980 ■ Baby Boomers: 1946-1964



LOOK FORWARD

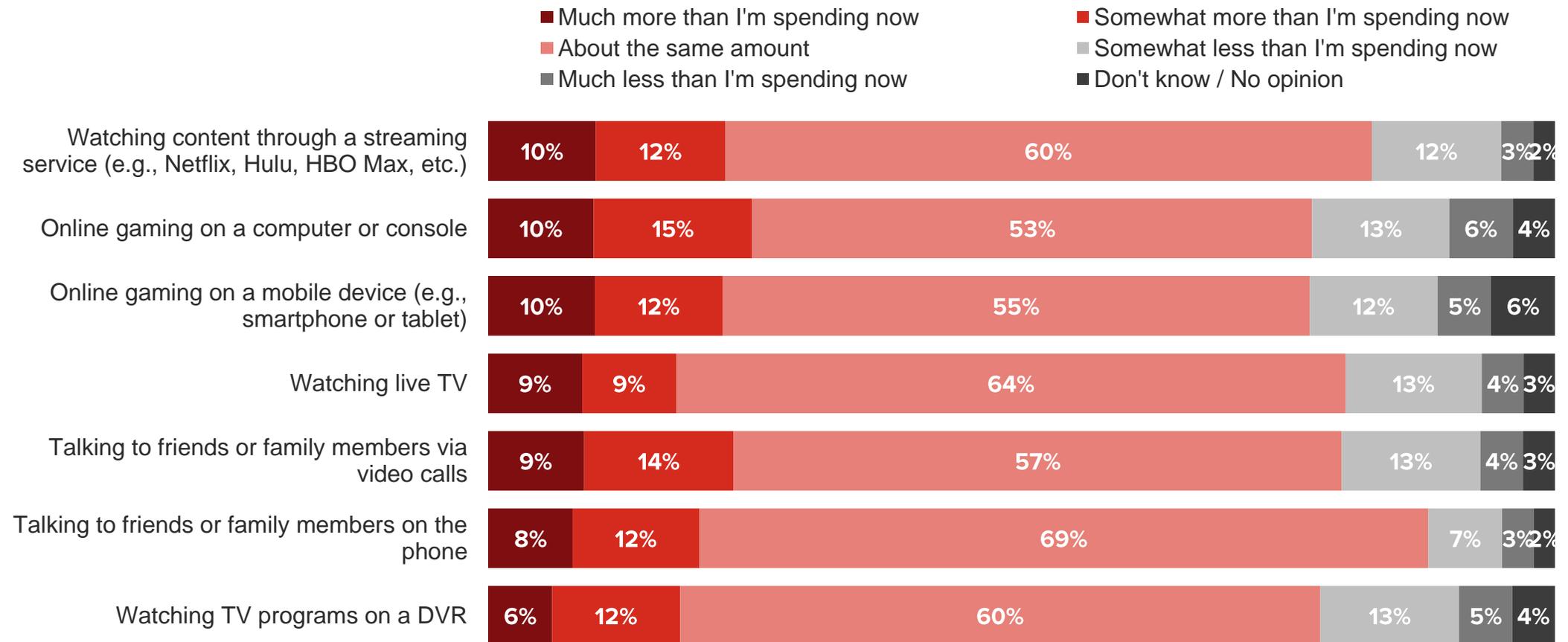
About a third of adults who've spent time online gaming (32%) and talking to friends or family via video calls (32%) say they were spending more time doing these activities in the early months of the pandemic than they are now, while nearly half say they were spending about the same amount of time as they are now.

About a year ago, in the early months of the pandemic, would you say you were spending more, less, or about the same amount of time that you're spending now on the following?



Looking ahead, majorities of adults who spend time on each activity expect they will be spending about the same amount of time a year from now as they are now.

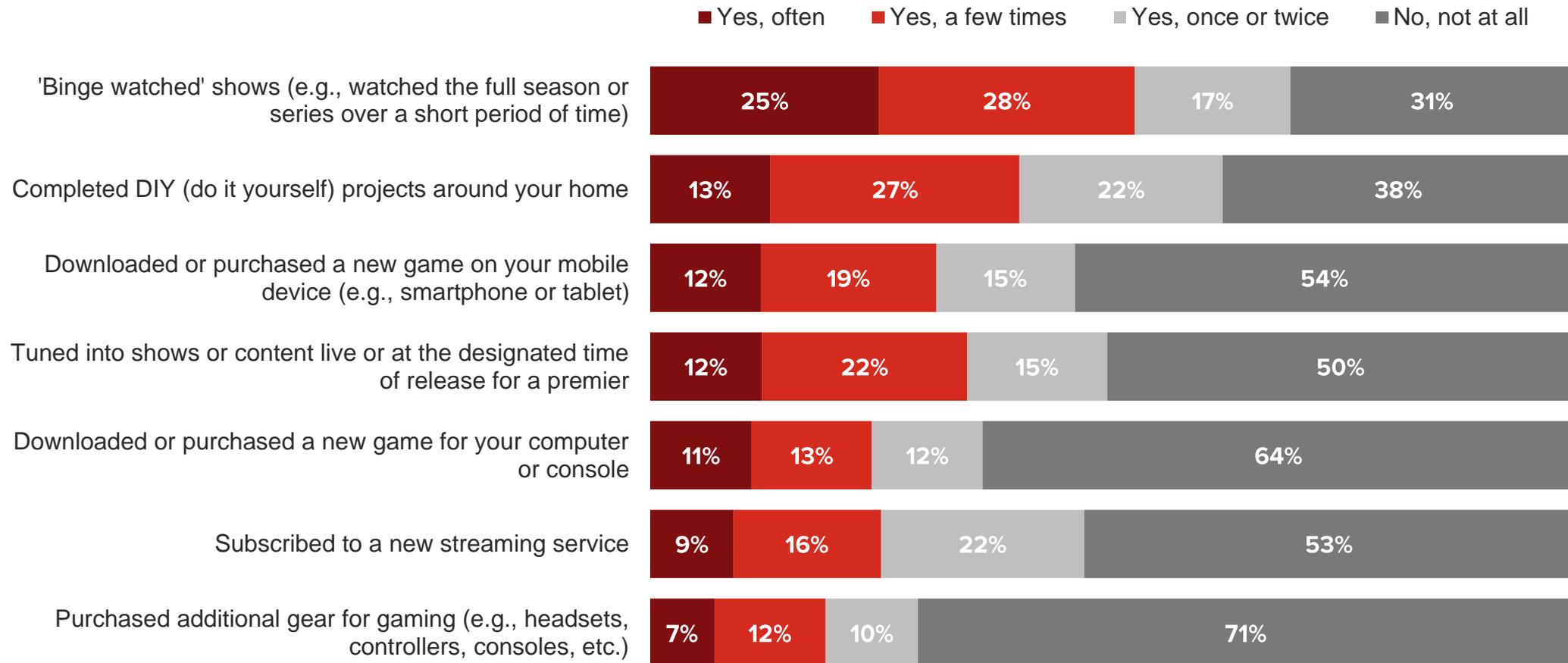
And, **thinking about life a year from now**, do you anticipate you will be spending more, less, or about the same amount of time that you're spending now on the following?



LOOK FORWARD

Most adults say they have binge watched shows at least once or twice since the start of the pandemic (70%). Nearly half (47%) say they have subscribed to a new streaming service.

Since the start of the coronavirus pandemic, have you...

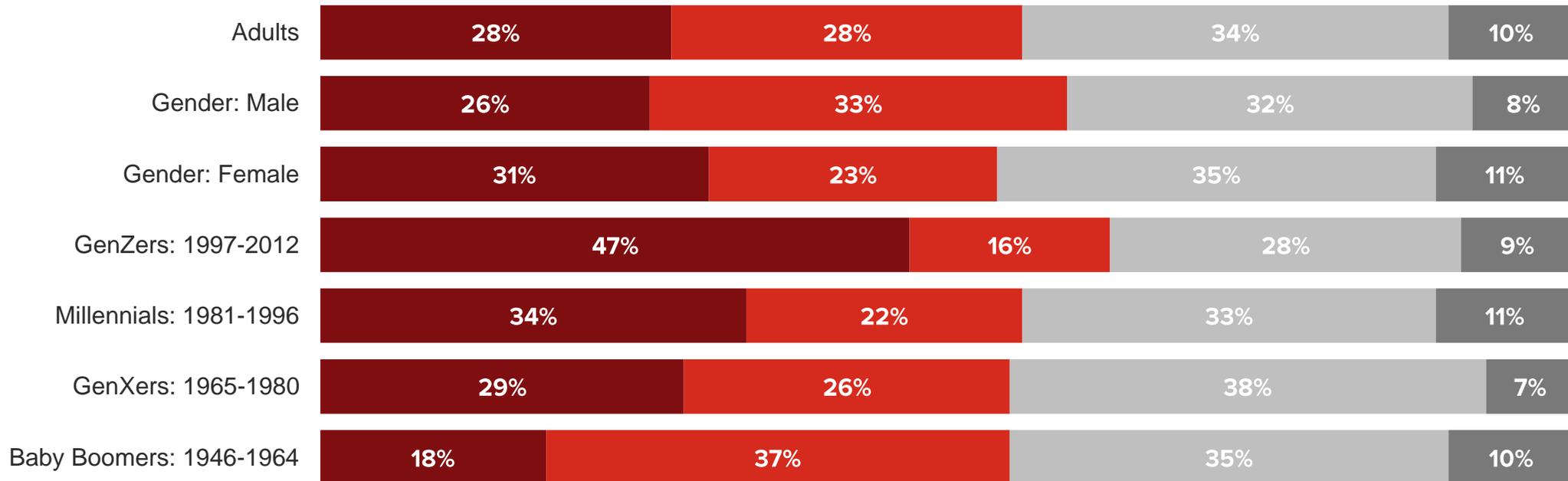


LOOK FORWARD

Adults are split in their preferences for consuming content, with 28% saying they prefer to “binge watch” shows and another 28% saying they prefer to space shows out or watch over time as episodes are released. A plurality (34%) prefer both equally. Younger generations are more likely to prefer “binge watching.”

In general, which of the following best describes how you prefer to consume content, even if none are exactly right?

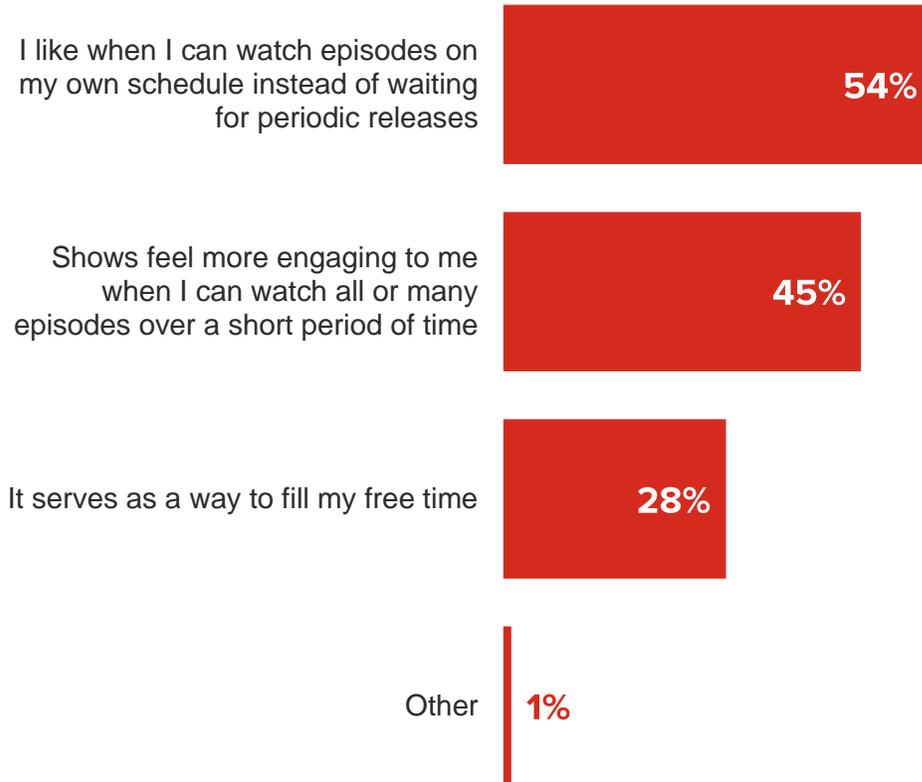
- I prefer to 'binge' shows, or watch all or many episodes over a short period of time.
- I prefer to space shows out over a longer period of time, or watch episode by episode as they are released.
- I prefer both of these equally.
- Don't know / No opinion



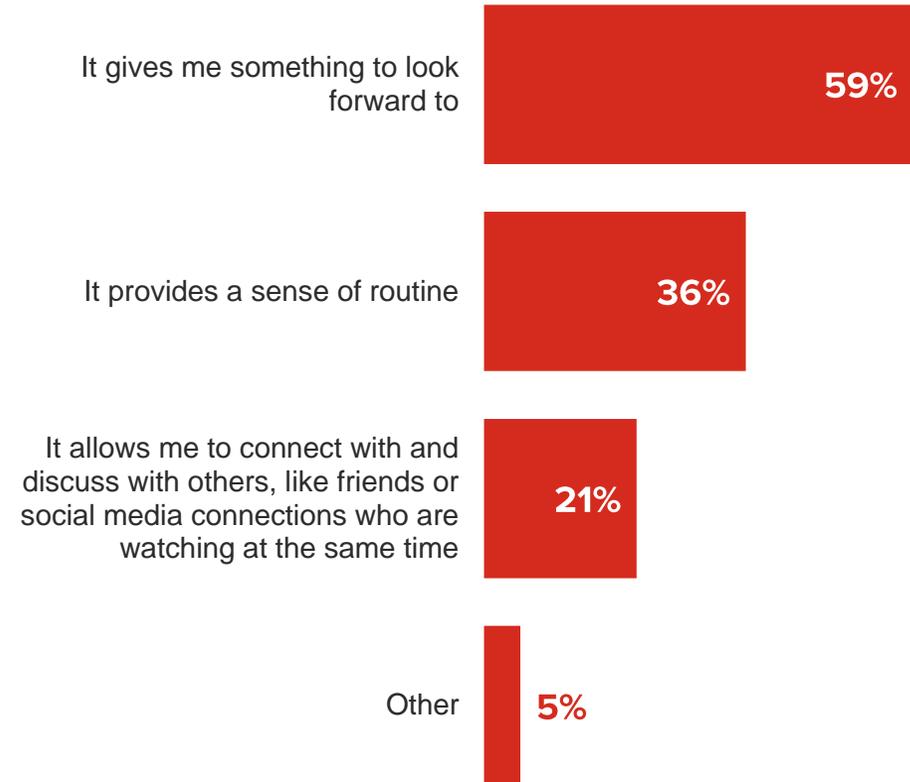
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Those who prefer “binge watching” most commonly express that they like to watch episodes on their own schedule, while those who prefer watching over time most commonly express that it gives them something to look forward to.

You indicated that you prefer to “binge” shows, or watch all or many episodes over a short period of time. Which of the following explain why? Select all that apply.



You indicated that you prefer to space shows out over a longer period of time, or watch episode by episode as they are released. Which of the following explain why? Select all that apply.

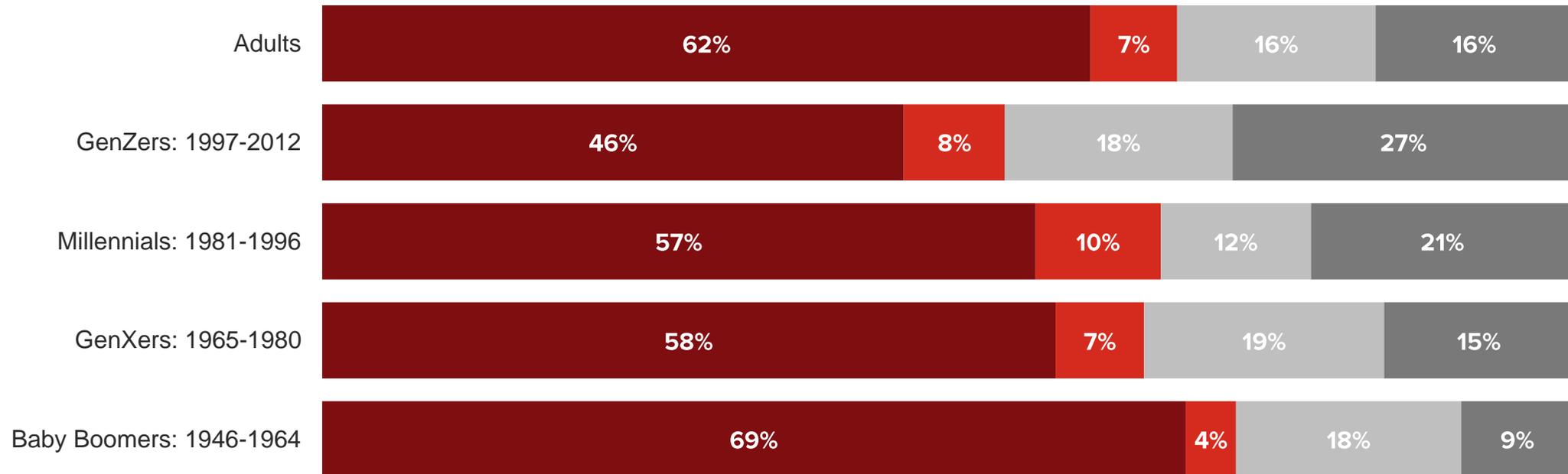


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Most US adults say that someone in their household currently subscribes to a cable or satellite television service (62%). Nearly 1 in 4 say they subscribed in the past, but don't anymore (23%). 1 in 5 millennials say they have *never* subscribed to a cable or satellite television service (21%).

Do you, or anyone in your household, subscribe to a cable or satellite television service?

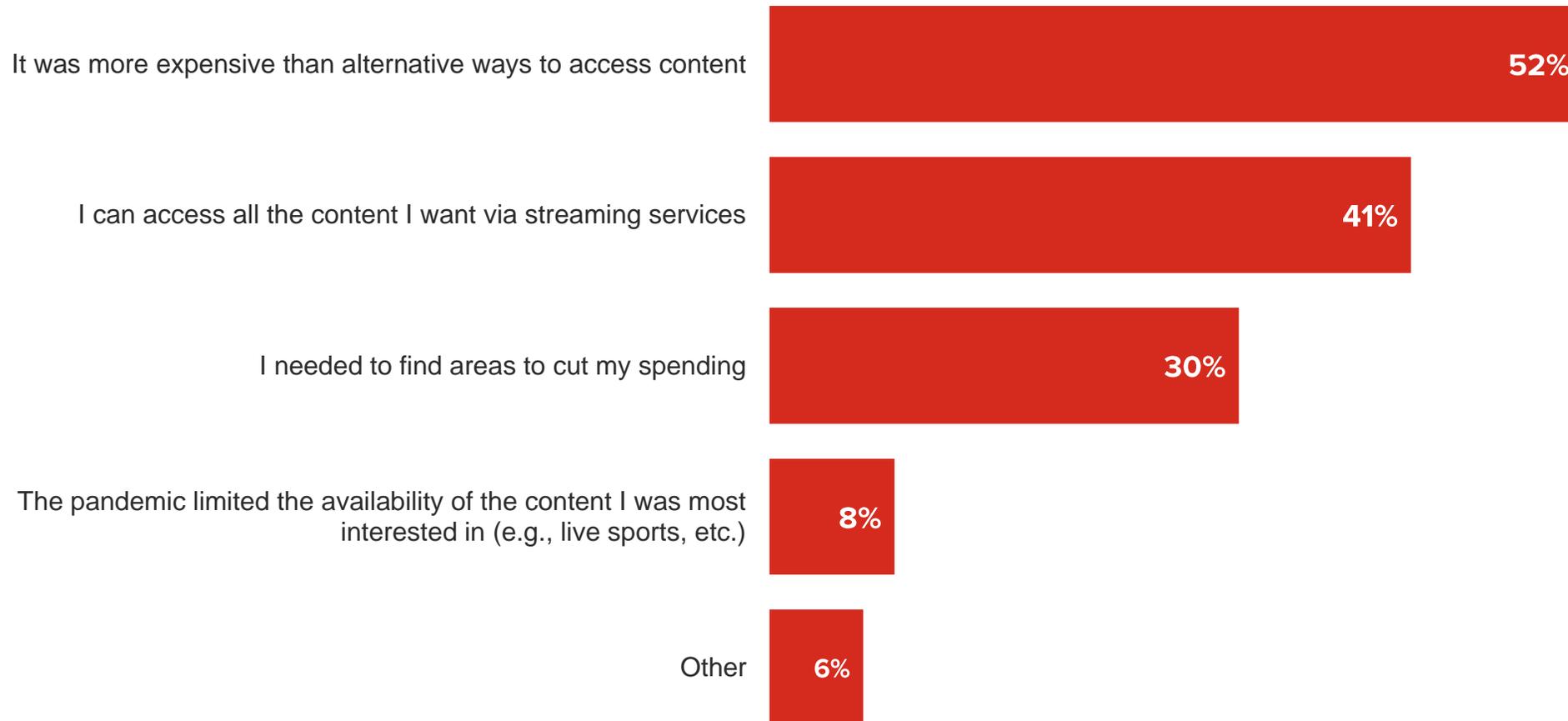
- Yes, I (or someone in my household) currently subscribe
- No, I (or someone in my household) subscribed in the past but canceled my service within the last year
- No, I (or someone in my household) subscribed in the past but canceled my service more than a year ago
- No, I (or someone in my household) have never subscribed



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Among those who indicated that they canceled their cable or satellite television subscription, most cite that it was more expensive than alternative ways to access content (52%).

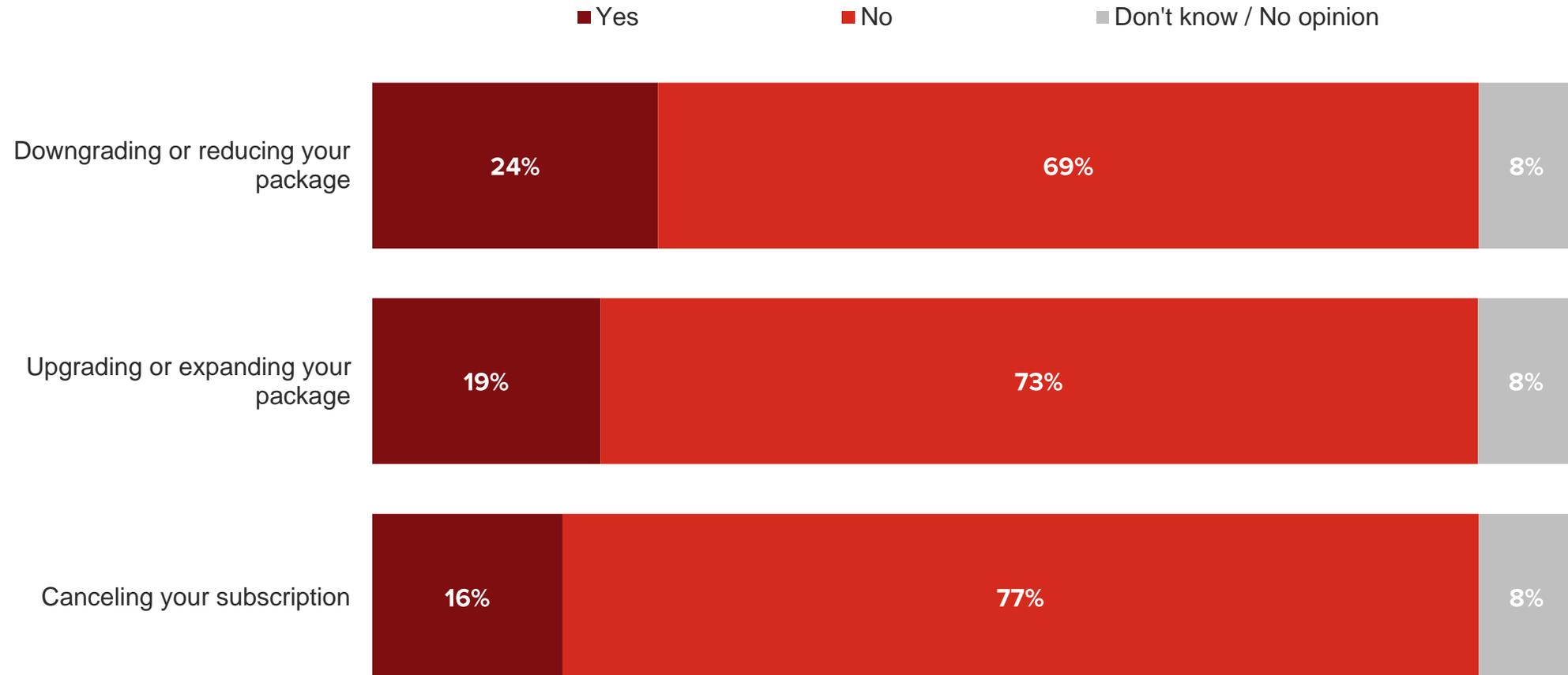
You indicated that you canceled your cable or satellite television subscription. Which of the following explain why? Select all that apply.



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Among those with an active cable or satellite television subscription, about 1 in 4 say they have considered downgrading or reducing their package within the last year (24%).

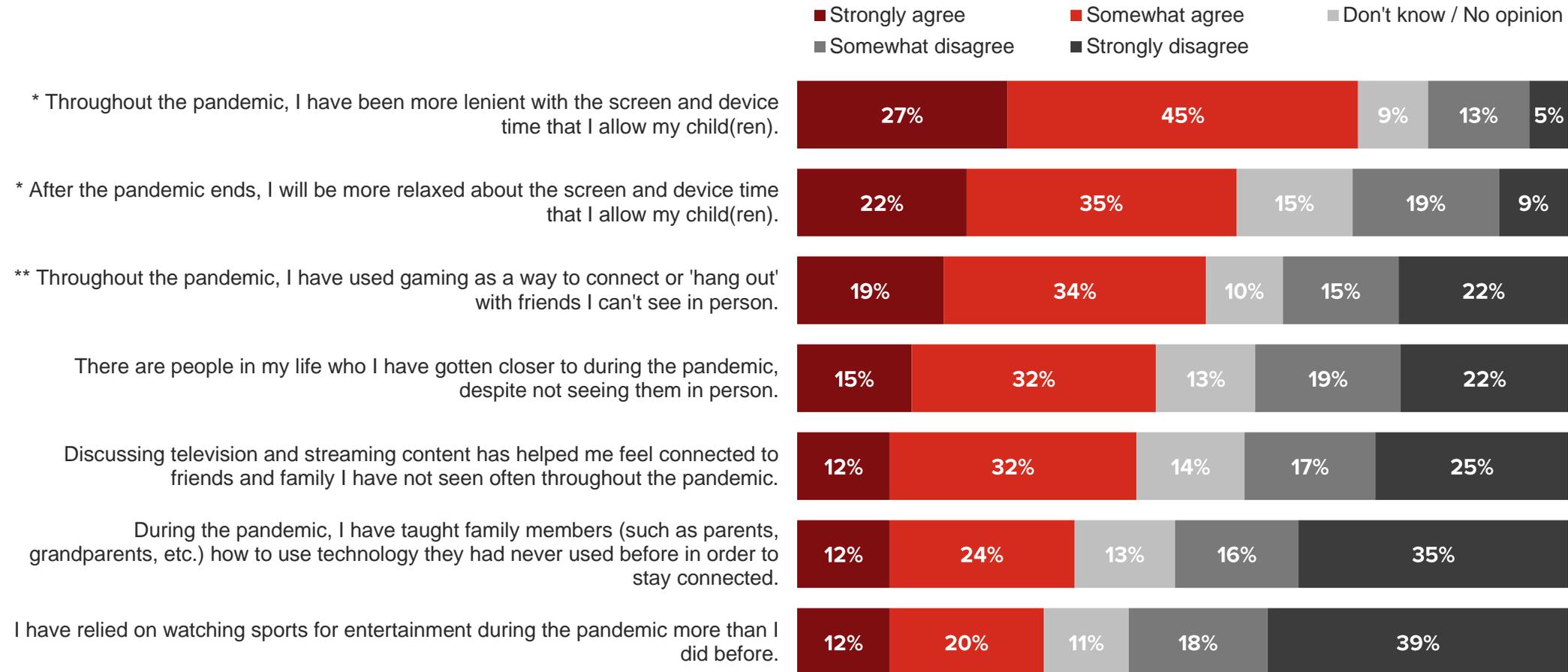
You indicated that you have a cable or satellite television subscription. **Within the last year**, have you considered...



LOOK FORWARD

Parents with children under 18 overwhelmingly express that they have been more lenient with their child(ren)'s screen time allowance throughout the pandemic (72%), and most say they will be more relaxed even after the pandemic ends (57%). More than 2 in 5 say that discussing TV and streaming content has helped them feel connected to friends and family during the pandemic (44%).

Do you agree or disagree with the following statements?



* Among parents with children under 18 in HH.

** Among respondents who play online computer/console games.

LOOK FORWARD

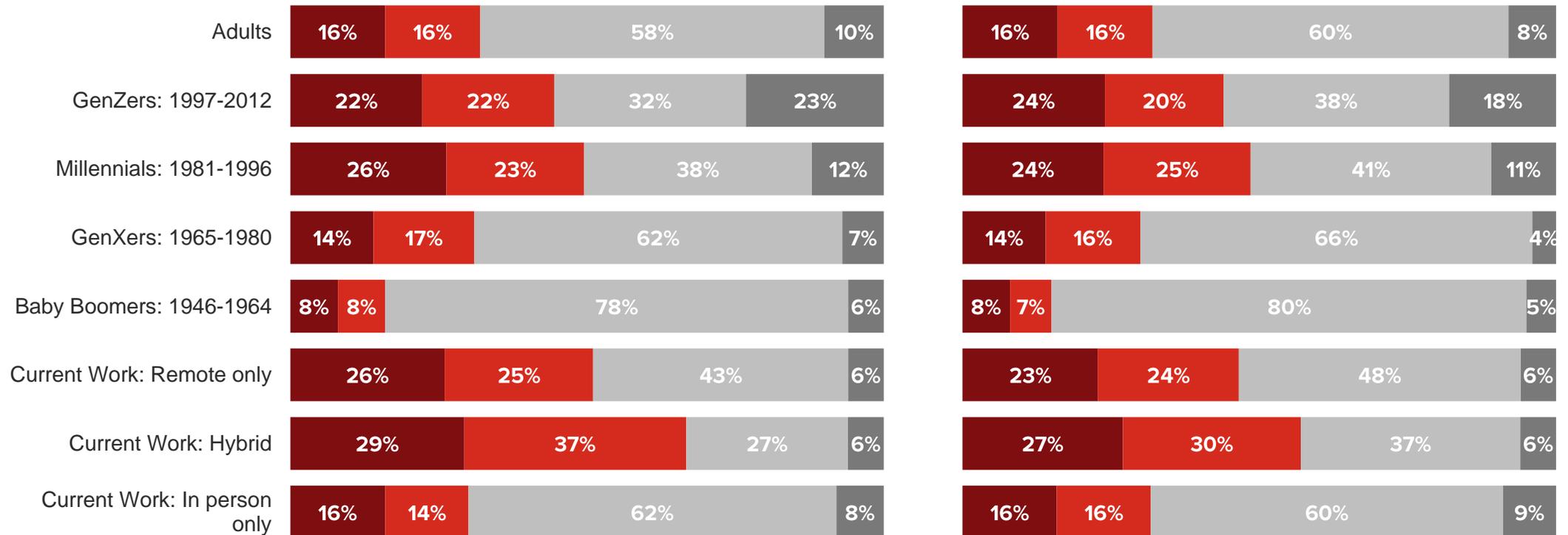
Nearly 1 in 3 adults say they either upgraded or considered upgrading both their home internet bandwidth (32%) and their mobile data plan (32%) within the last year. Younger generations and those who are working at least partially remotely are more likely to say so compared to their counterparts.

Within the last year, have you...

■ I did this ■ I have considered doing this ■ I have not considered doing this ■ Don't know / No opinion

UPGRADED YOUR HOME INTERNET BANDWIDTH TO SUPPORT INCREASED ONLINE ACTIVITY IN YOUR HOUSEHOLD?

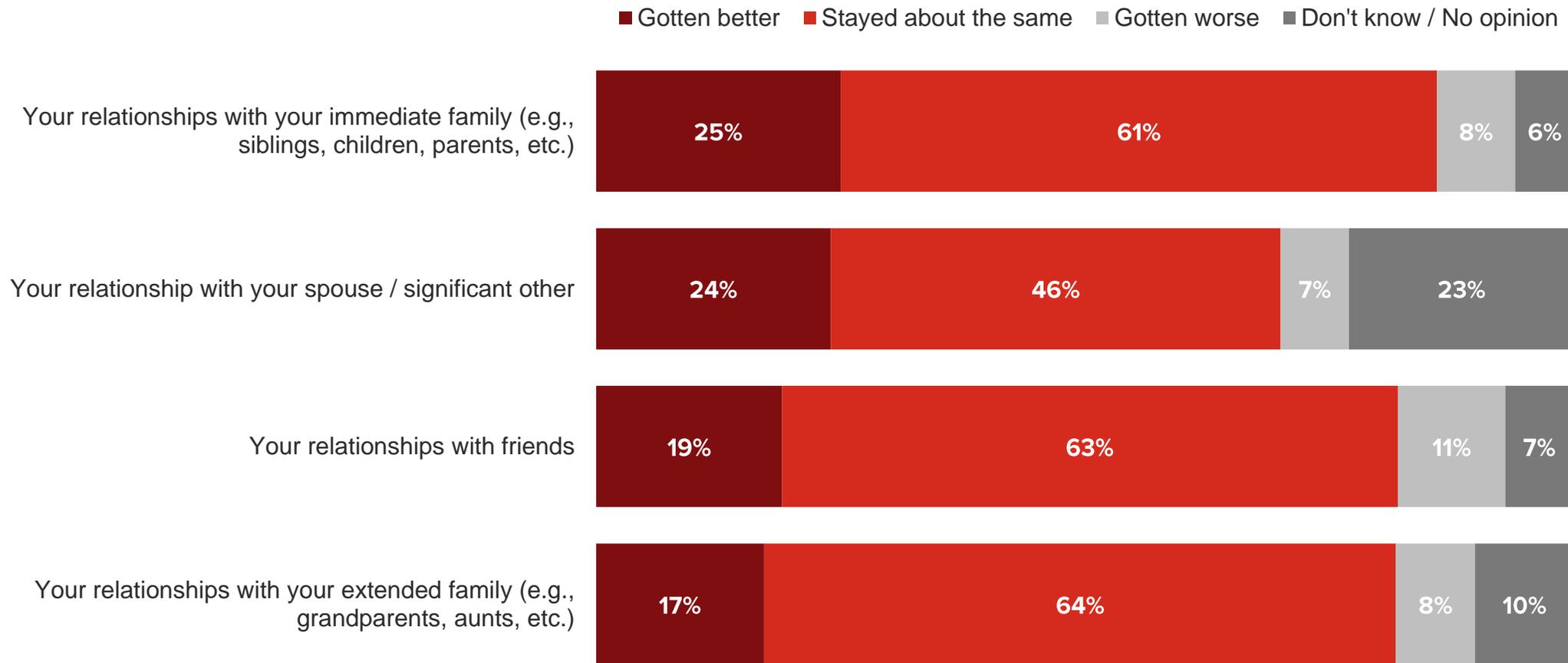
UPGRADED YOUR DATA PLAN FOR YOUR SMARTPHONE OR MOBILE DEVICE?



LOOK FORWARD

Most adults say their relationships with their immediate family, extended family, and friends have stayed the same throughout the pandemic. Across groups, more say their relationships have gotten better than gotten worse.

Thinking about your **life now compared to before the coronavirus pandemic**, would you say the following have gotten better or worse for you, or have they stayed about the same?



LOOK FORWARD

Adults most commonly say they have used text messages and phone calls to communicate with their friends and family throughout the pandemic. The strongest increase in reported usage from before the pandemic to during the pandemic is observed for video calls (21% to 26% for friends; 25% to 31% for immediately family).

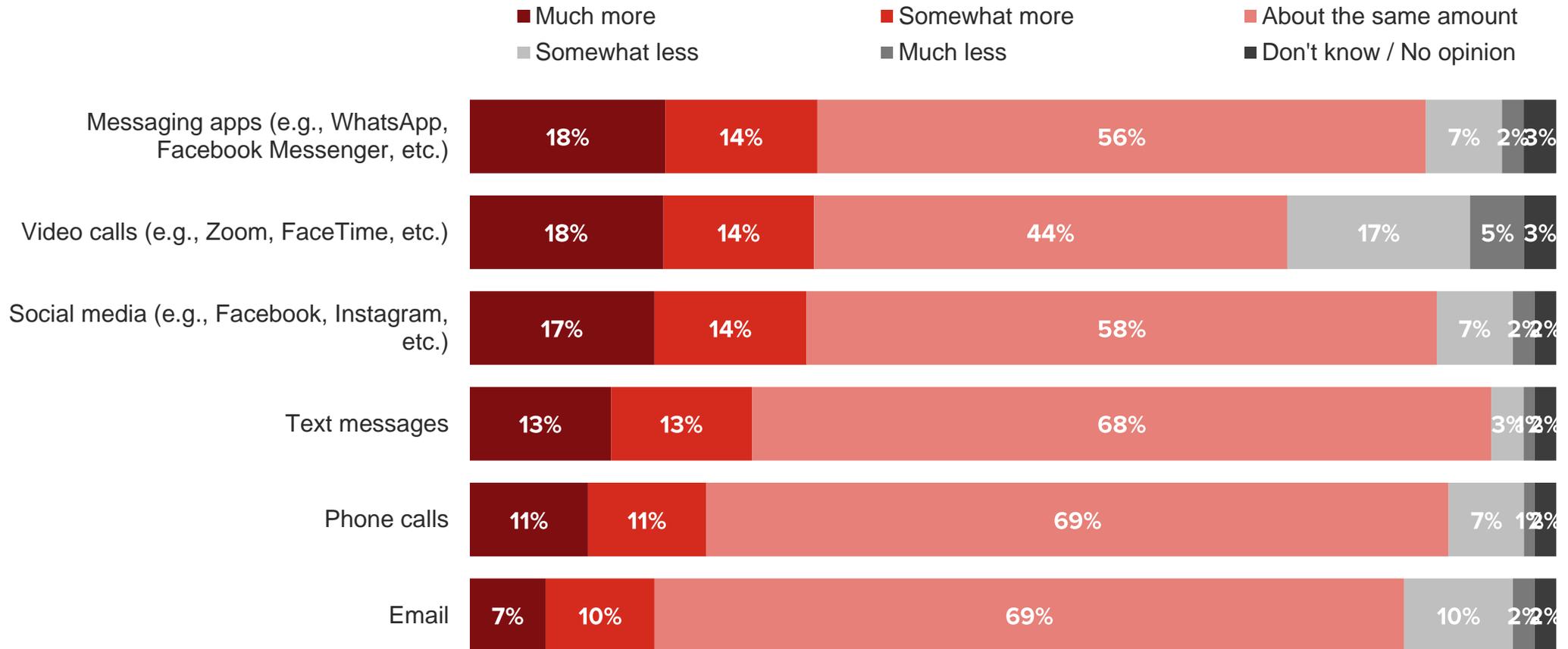
Before the coronavirus pandemic began, which of these did you use to communicate with the following groups of people? And, during the coronavirus pandemic, which of these have you used to communicate with the following groups of people?

	FRIENDS		IMMEDIATE FAMILY (e.g., siblings, children, parents, etc.)		EXTENDED FAMILY (e.g., grandparents, aunts, etc.)		SPOUSE / SIGNIFICANT OTHER	
	Have used during pandemic	Change vs. pre-pandemic usage	Have used during pandemic	Change vs. pre-pandemic usage	Have used during pandemic	Change vs. pre-pandemic usage	Have used during pandemic	Change vs. pre-pandemic usage
Text messages	58%	-2 pts	60%	--	38%	+1 pt	40%	-1 pt
Phone calls	56%	+2 pts	65%	-1 pt	51%	--	41%	-1 pt
Social media (e.g., Facebook, Instagram, etc.)	39%	-2 pts	32%	+2 pts	25%	--	18%	-1 pt
Messaging apps (e.g., WhatsApp, Facebook Messenger, etc.)	36%	--	31%	-1 pt	22%	--	21%	+1 pt
Video calls (e.g., Zoom, FaceTime, etc.)	26%	+5 pts	31%	+6 pts	22%	+6 pts	17%	+1 pt
Email	20%	-2 pts	20%	--	15%	+1 pt	11%	--

LOOK FORWARD

Among adults who use messaging apps, video calls, and social media to communicate, nearly 1 in 3 anticipate they will be using each respective form of communication more a year from now than they are now.

And finally, **a year from now**, do you anticipate that you will be using each of these to communicate with friends and family in general more, less, or about the same amount that you are now?





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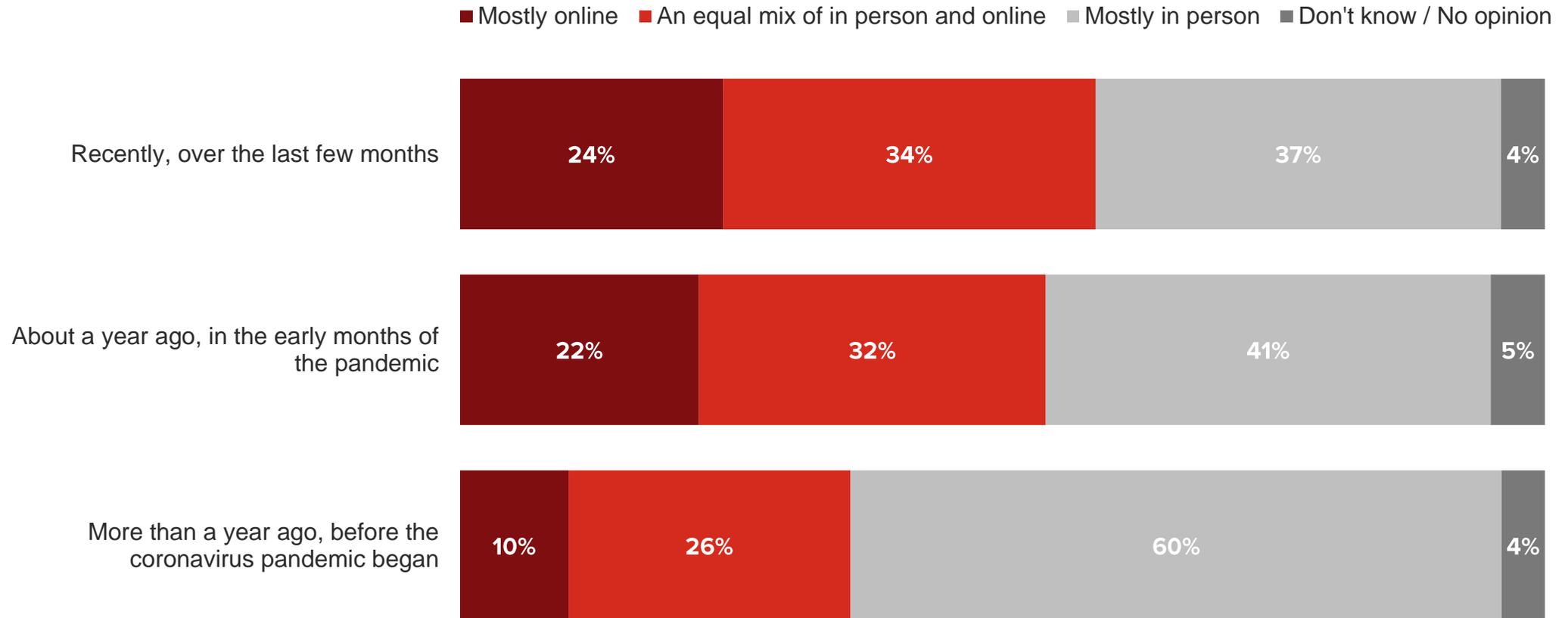
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Most adults say they were shopping mostly in person before the pandemic began (60%), while just over a third say the same now (37%). 1 in 4 say they've recently shopped mostly online, while 1 in 3 say they've recently shopped through an equal mix of in person and online (34%).

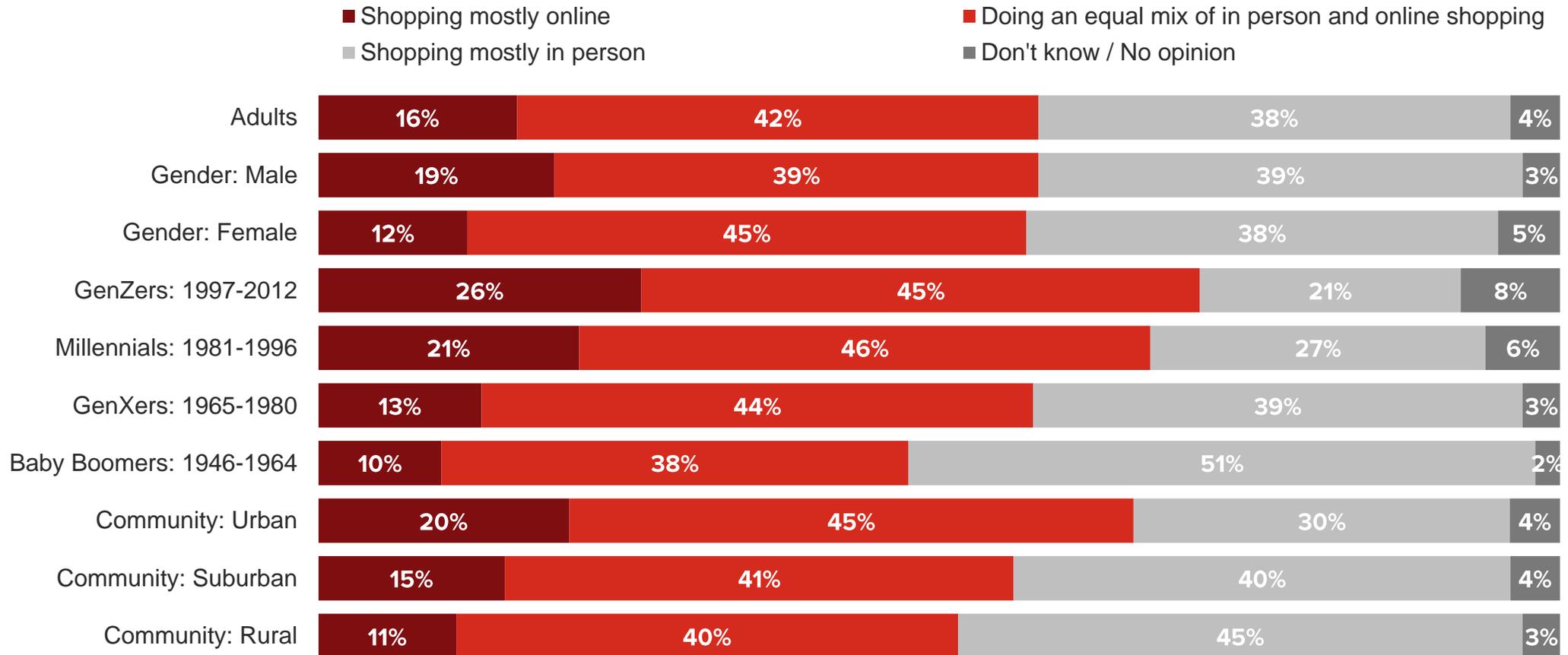
In general, thinking about all the different things you shop for (e.g., groceries, clothing, electronics, etc.), which of the following best describes your overall shopping habits during each period of time below?



LOOK FORWARD

A plurality of adults anticipate that a year from now, they will be shopping in person and online equally (42%). Just 38% anticipate they will be shopping mostly in person a year from now, a 22-point decrease from 60% who say they were shopping mostly in person before the pandemic began.

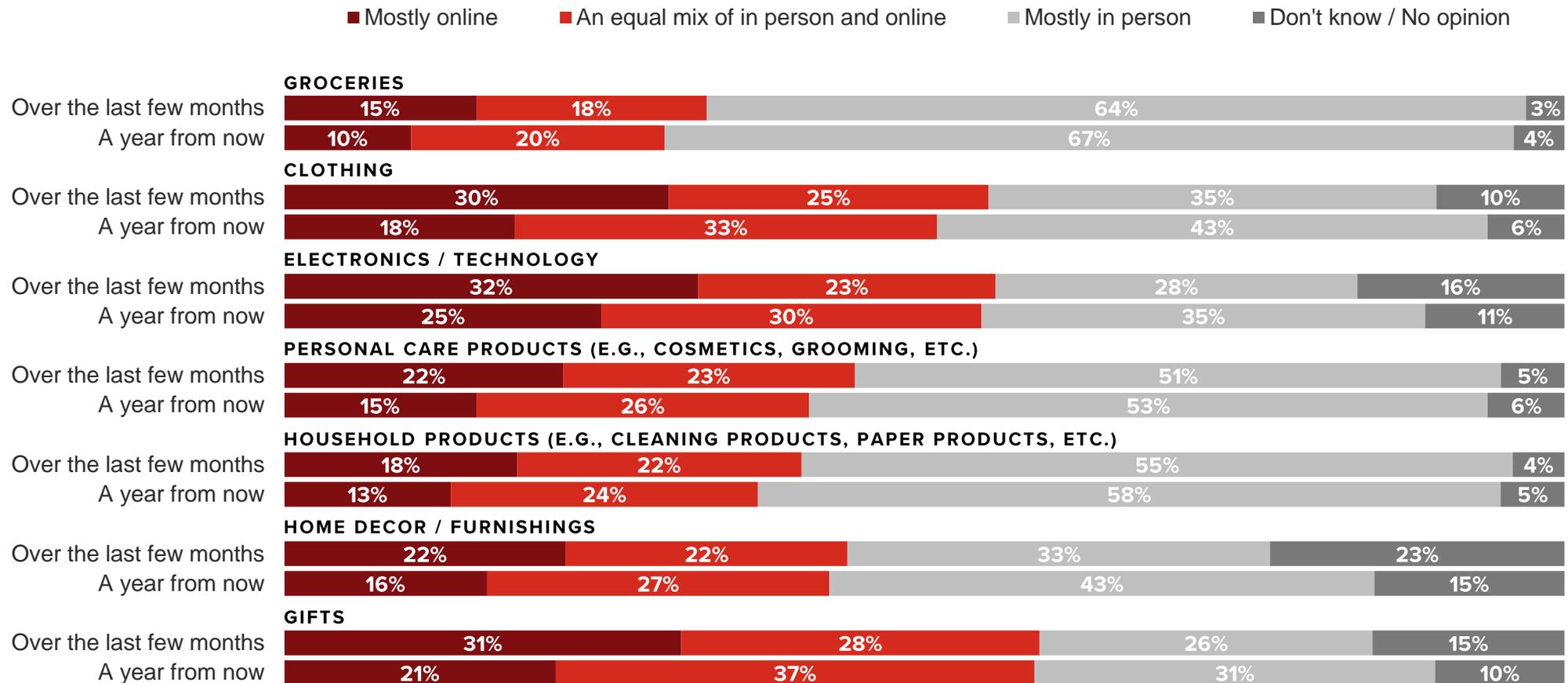
And, in general, thinking about all the different things you shop for (e.g., groceries, clothing, electronics, etc.), do you anticipate that **a year from now** you will be...



LOOK FORWARD

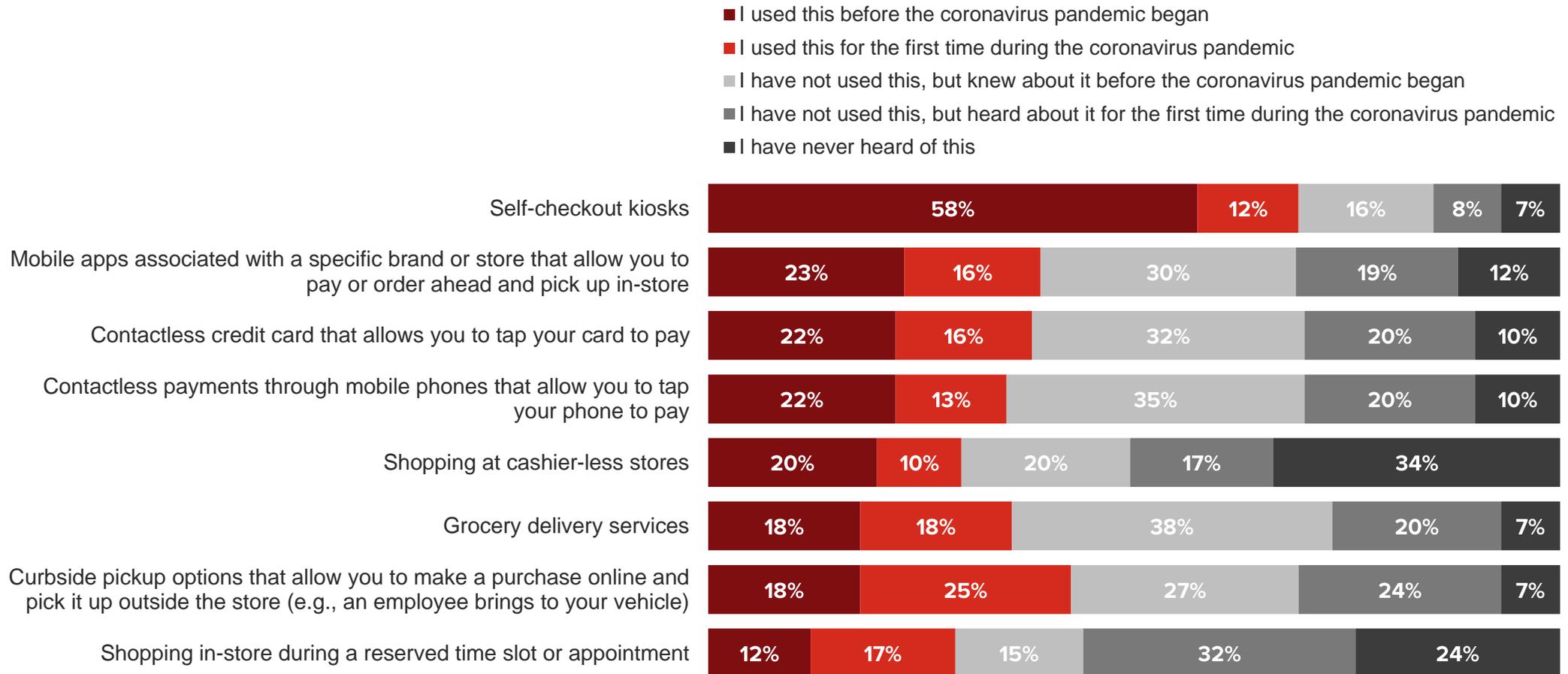
Adults most commonly say they have shopped mostly online or through an equal mix of online and in person for clothing, technology, and gifts over the last few months. Across categories, adults largely anticipate that their shopping behaviors a year from now will mirror their current behaviors.

More specifically, **over the last few months**, how have you been shopping for the following items? And, how do you anticipate that you will be shopping for the following items **a year from now**?



About 1 in 3 adults say they either used or heard about contactless credit cards (36%), contactless mobile payments (33%), and grocery delivery services (38%) for the first time during the coronavirus pandemic.

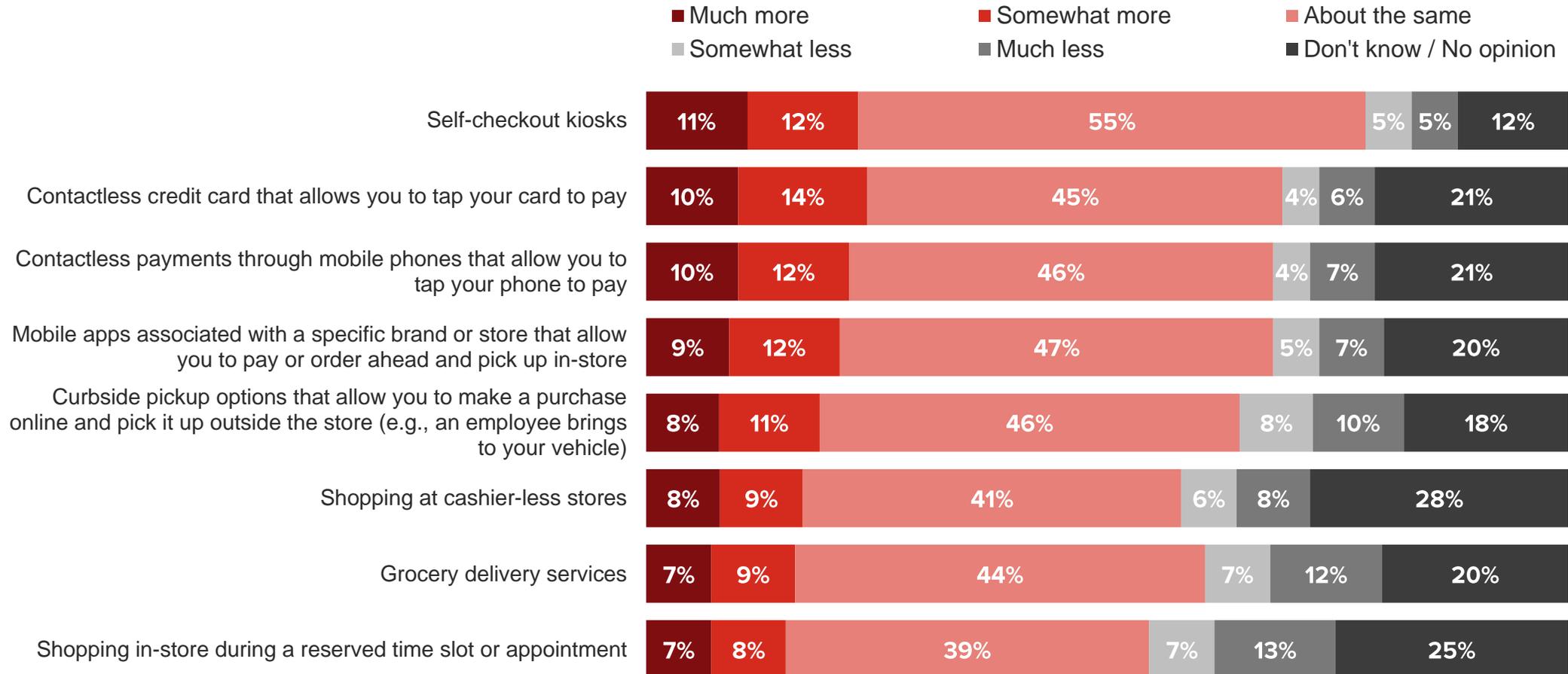
Please select the option that best describes your use of the following.



LOOK FORWARD

More than 1 in 5 adults anticipate they will be using self-checkout (23%), contactless credit cards (24%), and contactless mobile payments (22%) more a year from now than they are now.

And, **a year from now**, do you anticipate you will be using each of these more, less, or about the same amount that you are now?



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