



**TRACKING THE RETURN TO  
NORMAL: CONSUMERS'  
COMFORT RETURNING TO  
RETAIL SPACES**

ARF SHOPPERxSCIENCE

MARCH 2021



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|  
WHO WE ARE

MORNING CONSULT IS A GLOBAL  
DATA INTELLIGENCE COMPANY  
DELIVERING INSIGHTS ON WHAT  
PEOPLE THINK IN REAL TIME.

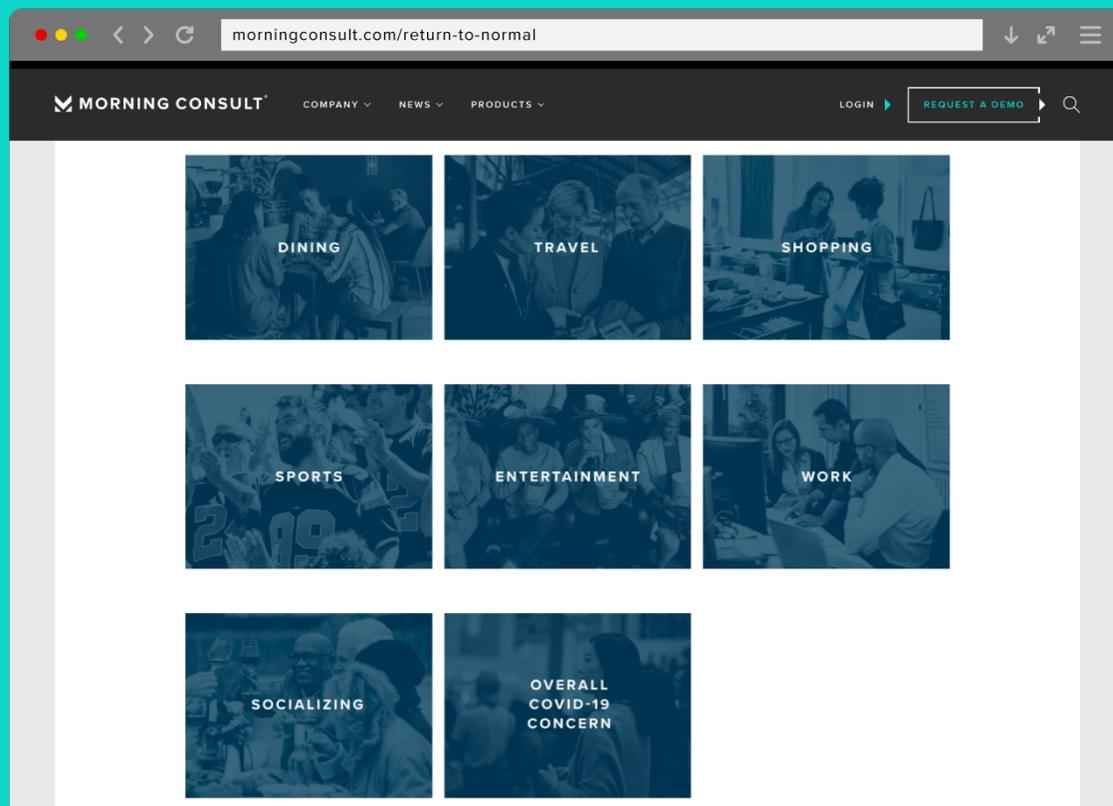


## TRACKING THE RETURN TO NORMAL

“Tracking the Return to Normal” is the ultimate destination for insight into Americans’ current state of comfort and their readiness to return to pre-pandemic habits and activities.

Morning Consult began tracking COVID-19 concerns in January of last year, and continues to update its rich trend data every week for insight into consumers’ latest sentiments.

The interactive graphs allow readers to better understand the shifts over time as the pandemic has progressed.



AGENDA

TRACKING CONSUMER COMFORT

TRACKING REPORTED SPENDING

WHAT'S NEXT?





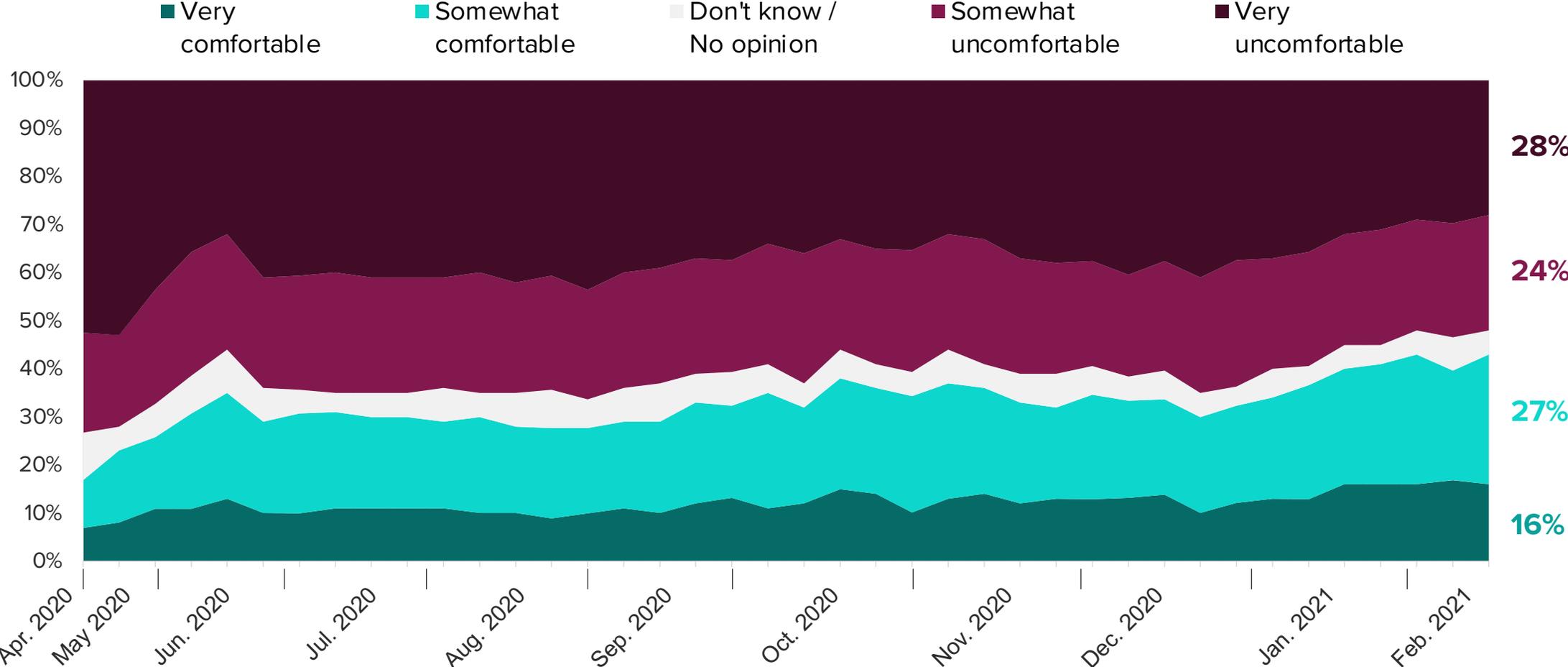
# 52%

of U.S. adults say they're uncomfortable going to a shopping mall right now, including 30% who say they're "very" uncomfortable.

TRACKING CONSUMER COMFORT

# Comfort Levels in Going to a Shopping Mall Right Now

Respondents were asked whether they feel comfortable right now going to a shopping mall





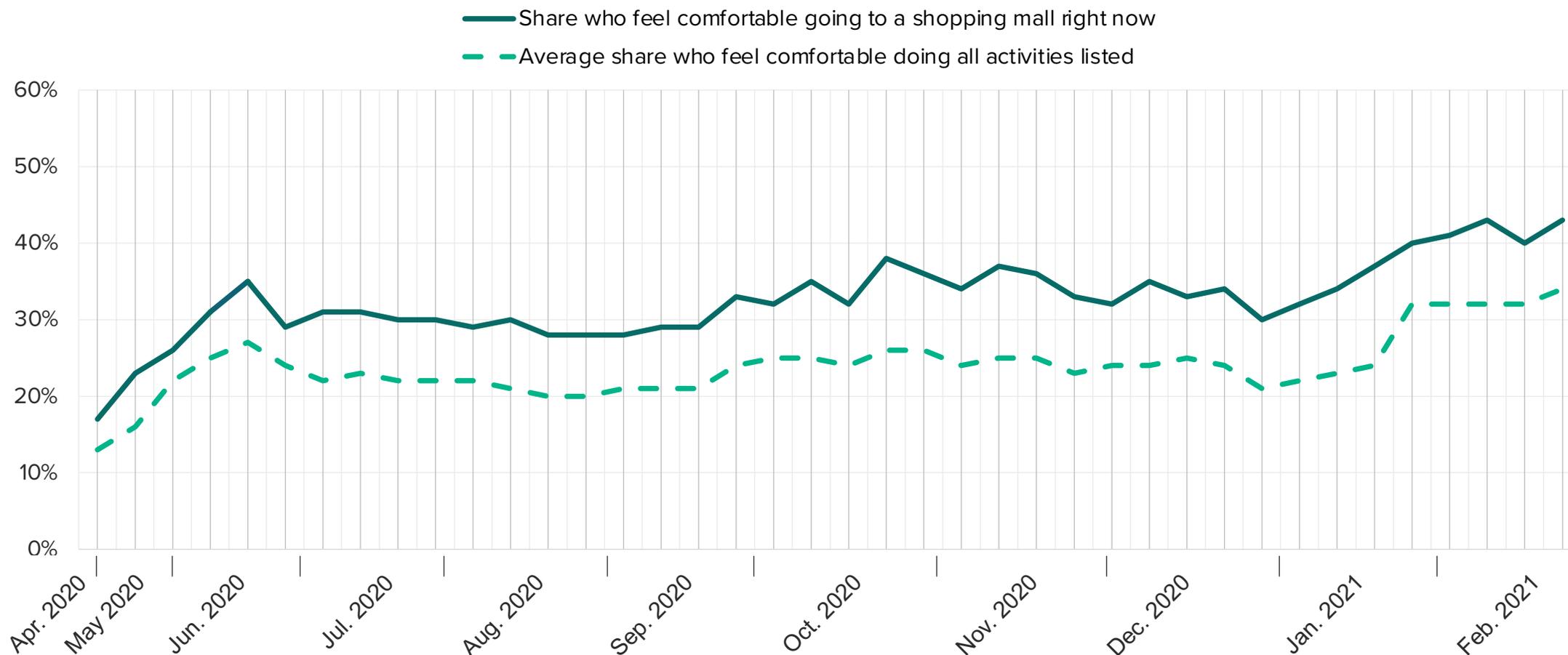
# 43%

of U.S. adults say they feel comfortable going to a shopping mall right now.

TRACKING CONSUMER COMFORT

# Comfort With Returning to Shopping Malls Is Ticking Up

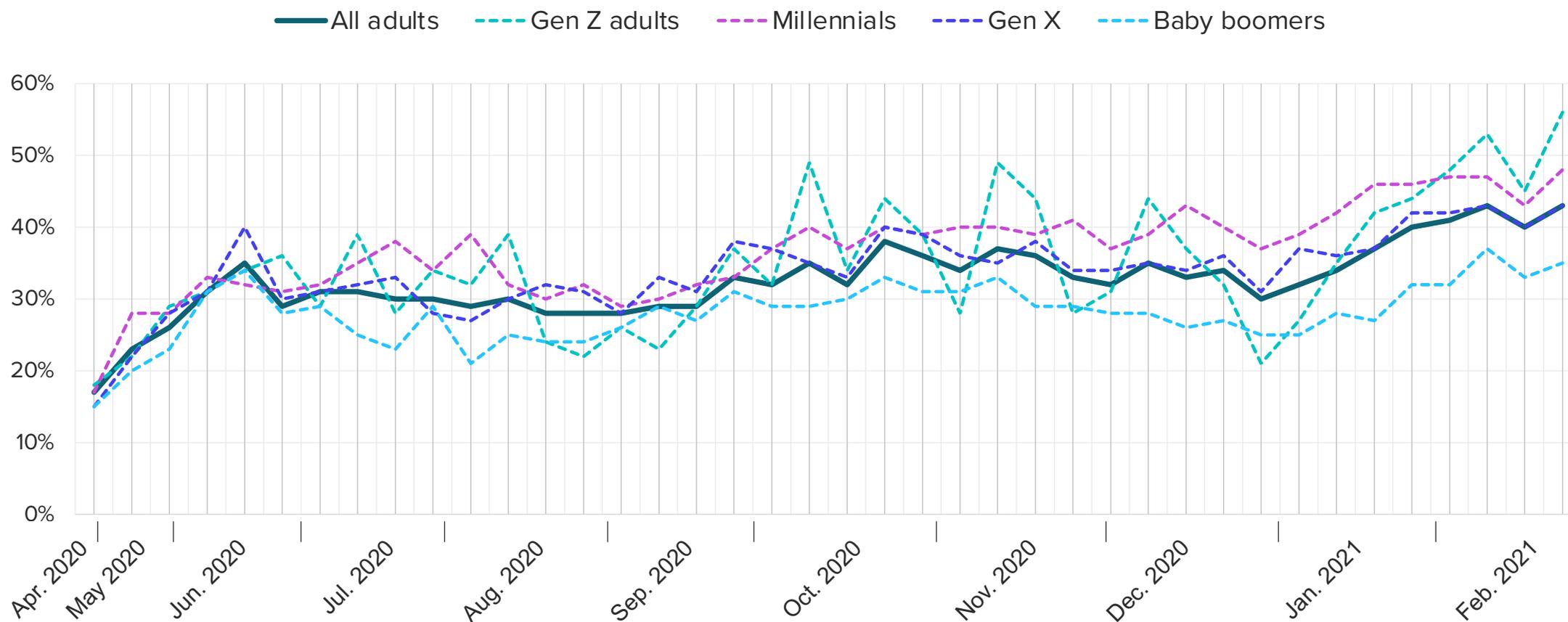
Respondents were asked how comfortable they feel going to a shopping mall right now. The share who said they feel “very” or “somewhat” comfortable over time are displayed below.



TRACKING CONSUMER COMFORT

# Shopping Mall Comfort by Generation

Respondents were asked how comfortable they feel going to a shopping mall right now. The share who said they feel “very” or “somewhat” comfortable over time are displayed below.





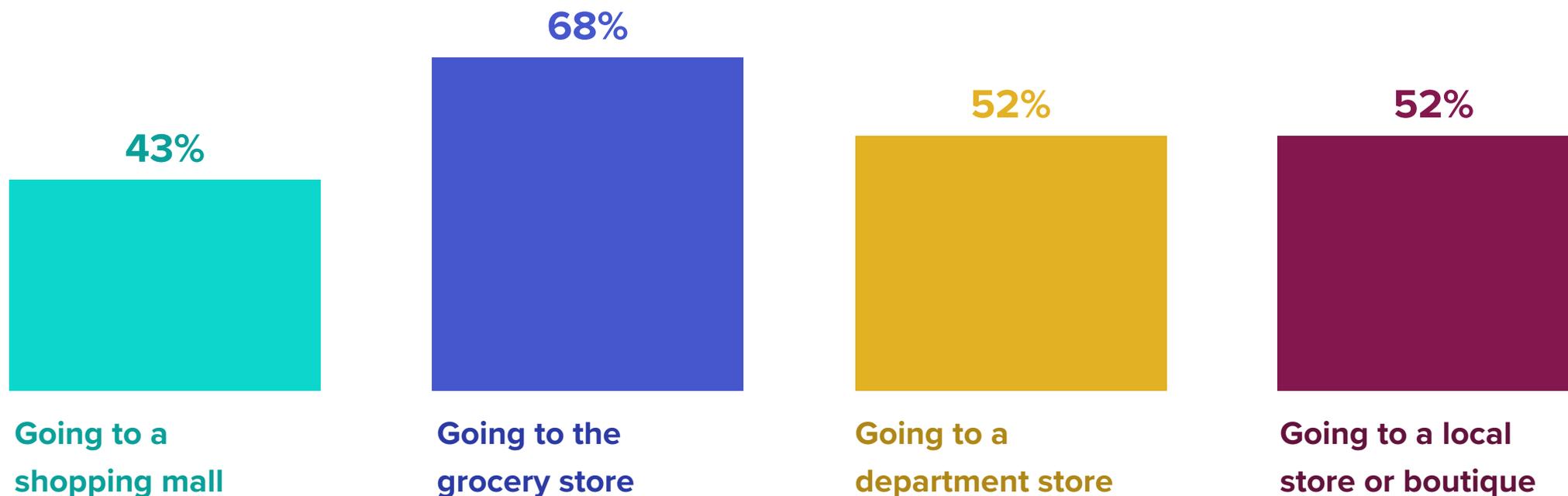
# 52%

of U.S. adults say they feel comfortable going to a **department store** or **boutiques** right now.

## TRACKING CONSUMER COMFORT

## Consumers Feel Safer at Department Stores, Boutiques Compared to Malls

Respondents were asked how comfortable they feel doing the following activities right now. The share who said they feel “very” or “somewhat” comfortable in the latest Morning Consult survey are displayed below.



AGENDA

TRACKING CONSUMER COMFORT

TRACKING REPORTED SPENDING

WHAT'S NEXT?



# 35%

of the public say they're spending **less in general** amid the pandemic.

# 52%

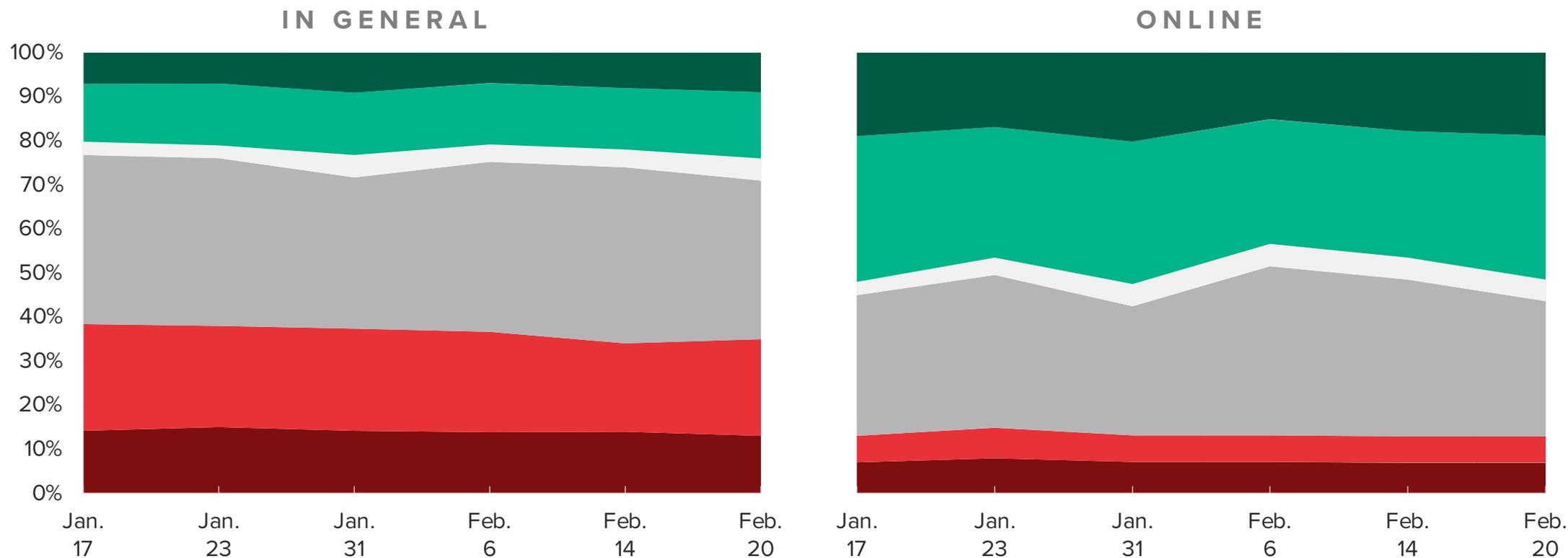
of the public says they're spending **more on online purchases** amid the pandemic.

TRACKING REPORTED SPENDING

# Into 2021, the Public Is Spending More Money Online

Respondents were asked whether they were spending more or less **in general** and on **online purchases** amid the pandemic

■ Much less  
 ■ Somewhat less  
 ■ About the same  
 ■ Don't know / No opinion  
 ■ Somewhat more  
 ■ Much more





67%

of Americans with an annual income of \$100,000 or more say they're spending more money online amid the pandemic.

TRACKING REPORTED SPENDING

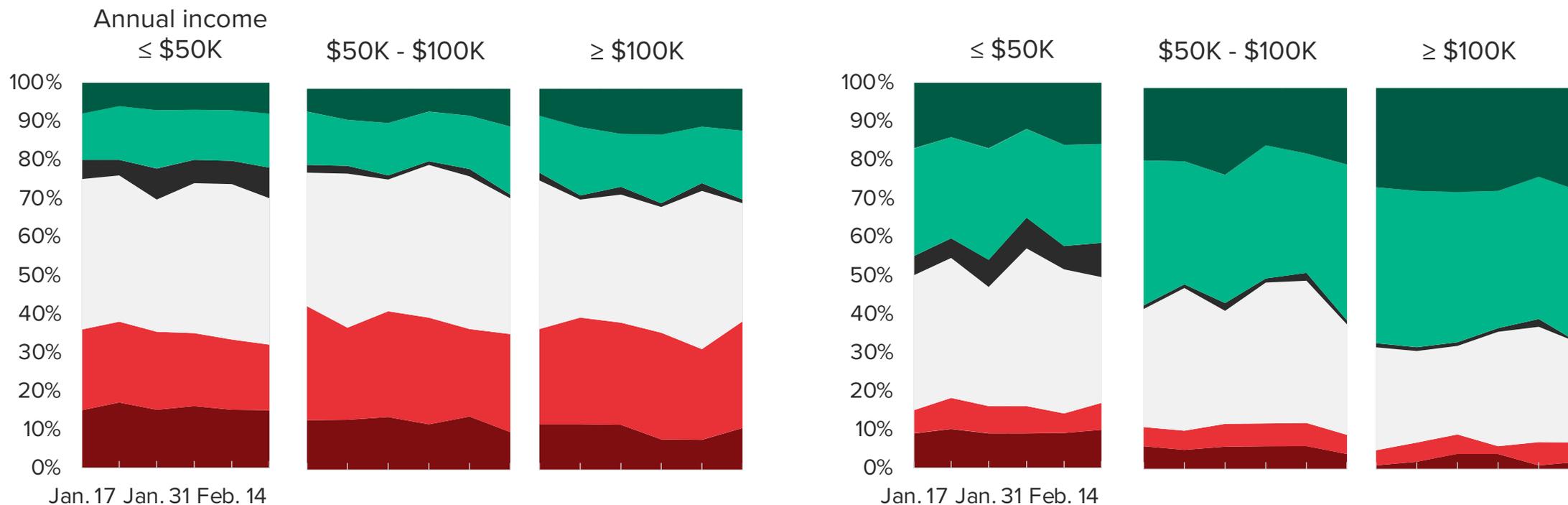
# Americans With \$100K Annual Income Say They're Spending More Money Online

Respondents were asked whether they were spending more or less **in general** and on **online purchases** amid the pandemic

■ Much less   
 ■ Somewhat less   
 ■ About the same   
 ■ Don't know / No opinion   
 ■ Somewhat more   
 ■ Much more

## IN GENERAL

## ONLINE



AGENDA

TRACKING CONSUMER COMFORT

TRACKING REPORTED SPENDING

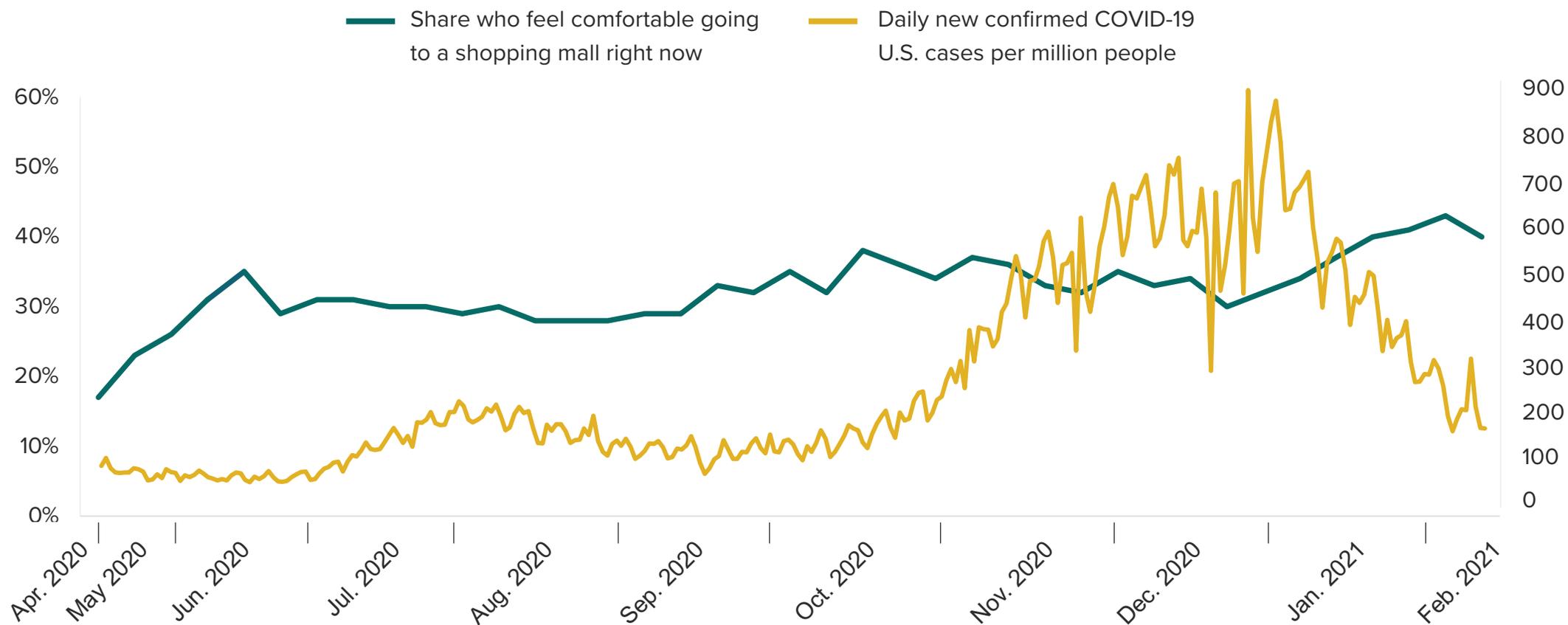
WHAT'S NEXT?



WHAT'S NEXT

# As New Confirmed Cases Drop, Comfort Rises

Respondents were asked how comfortable they feel going to a shopping mall right now. The share who said they feel “very” or “somewhat” comfortable over time are displayed below.





INTELLIGENT DATA,  
INTELLIGENT DECISIONS