



COVID-19 U.S. CONSUMER IMPACT TRACKING STUDY – WEEK 21

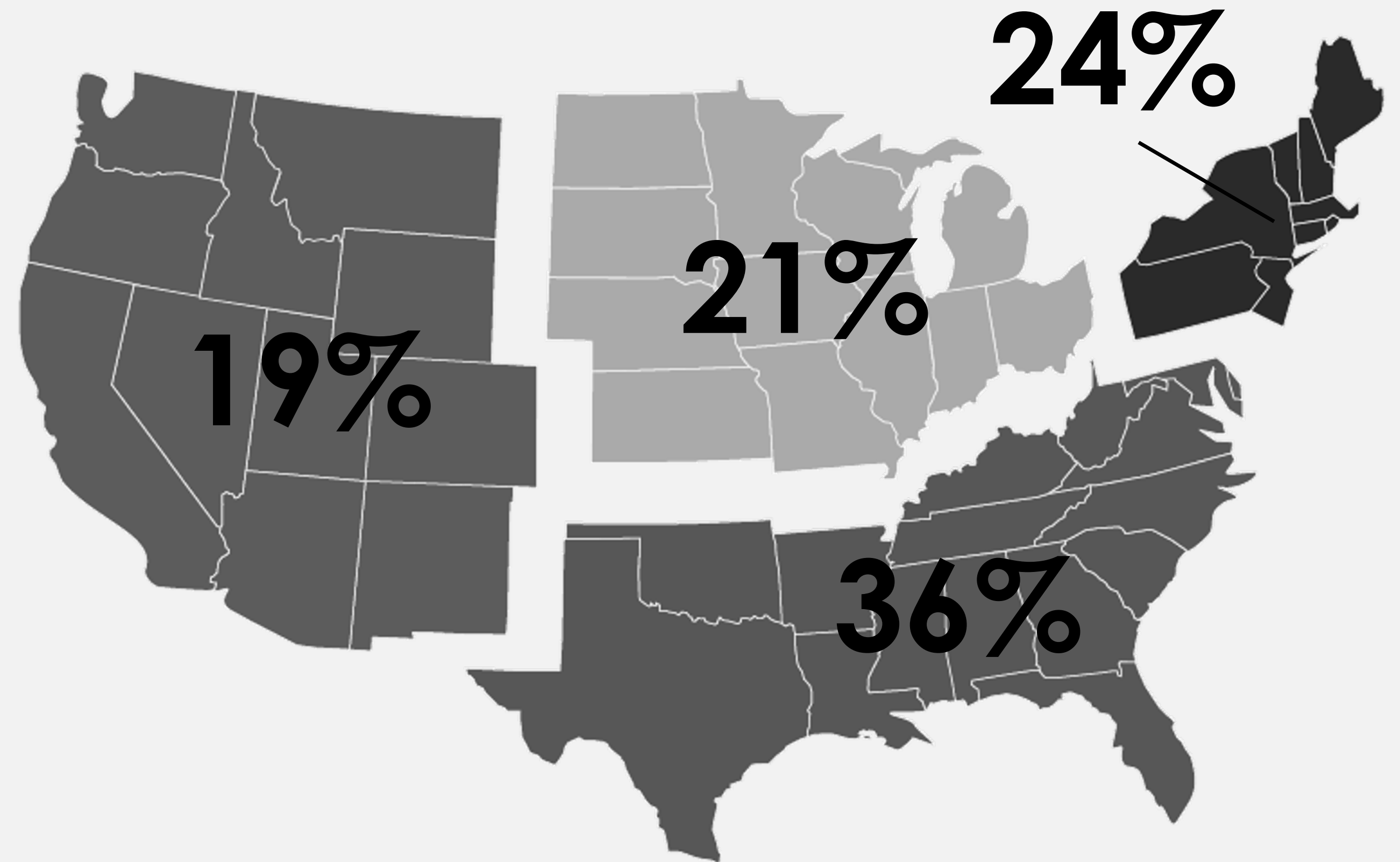
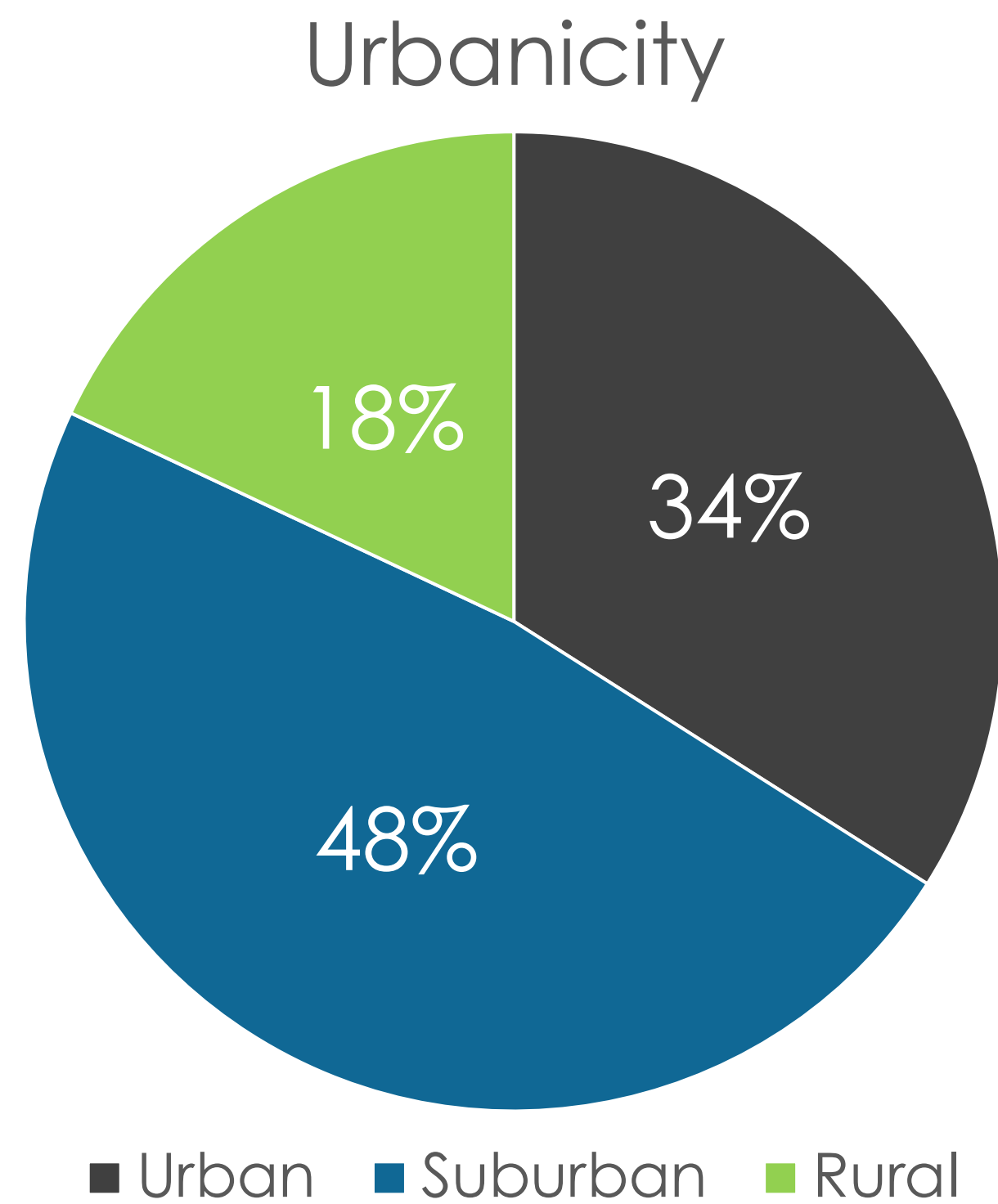
PRESENTED JULY 27, 2020

Methodology

- N = 1018; Census Balanced
- MOE = $\pm 3.07\%$
- Panel: General Population
- Collected: 07/16/20, 07/17/20

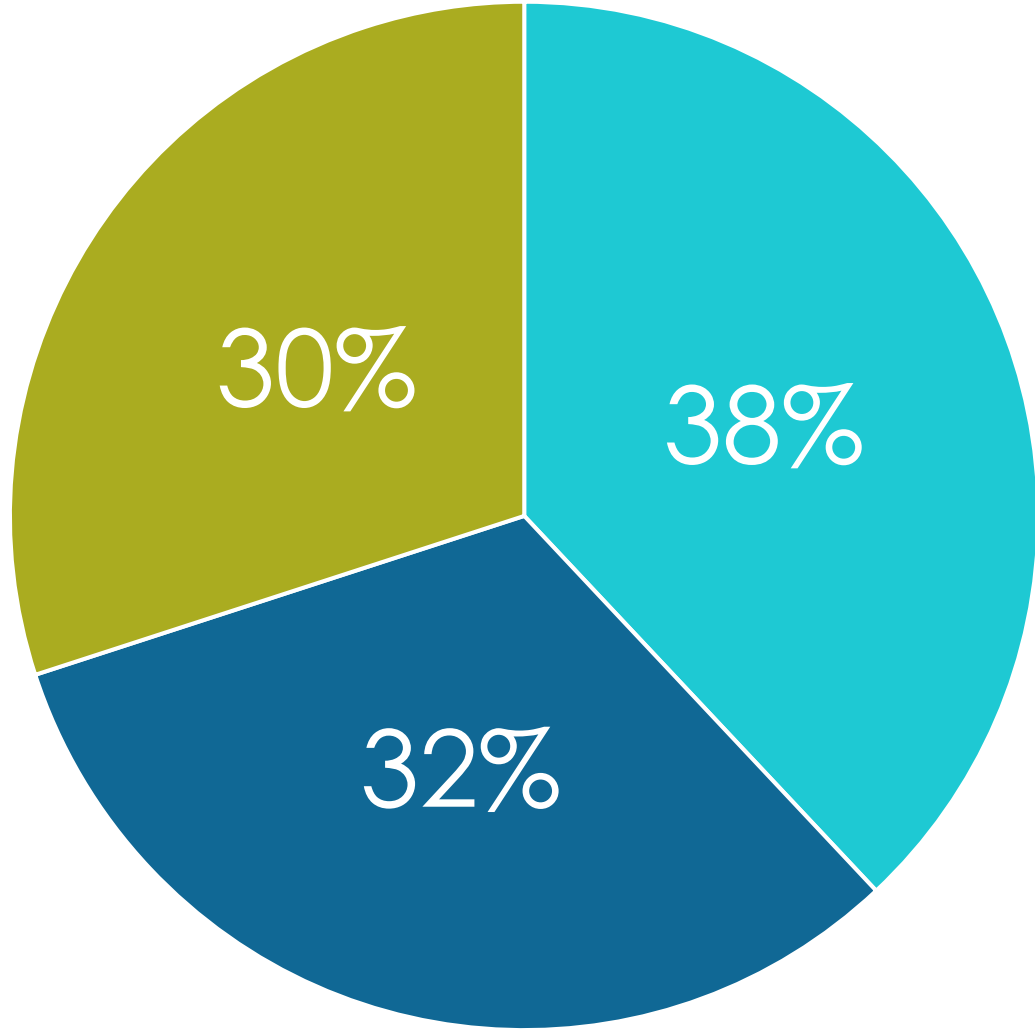


Census Balanced Panel is Representative of America



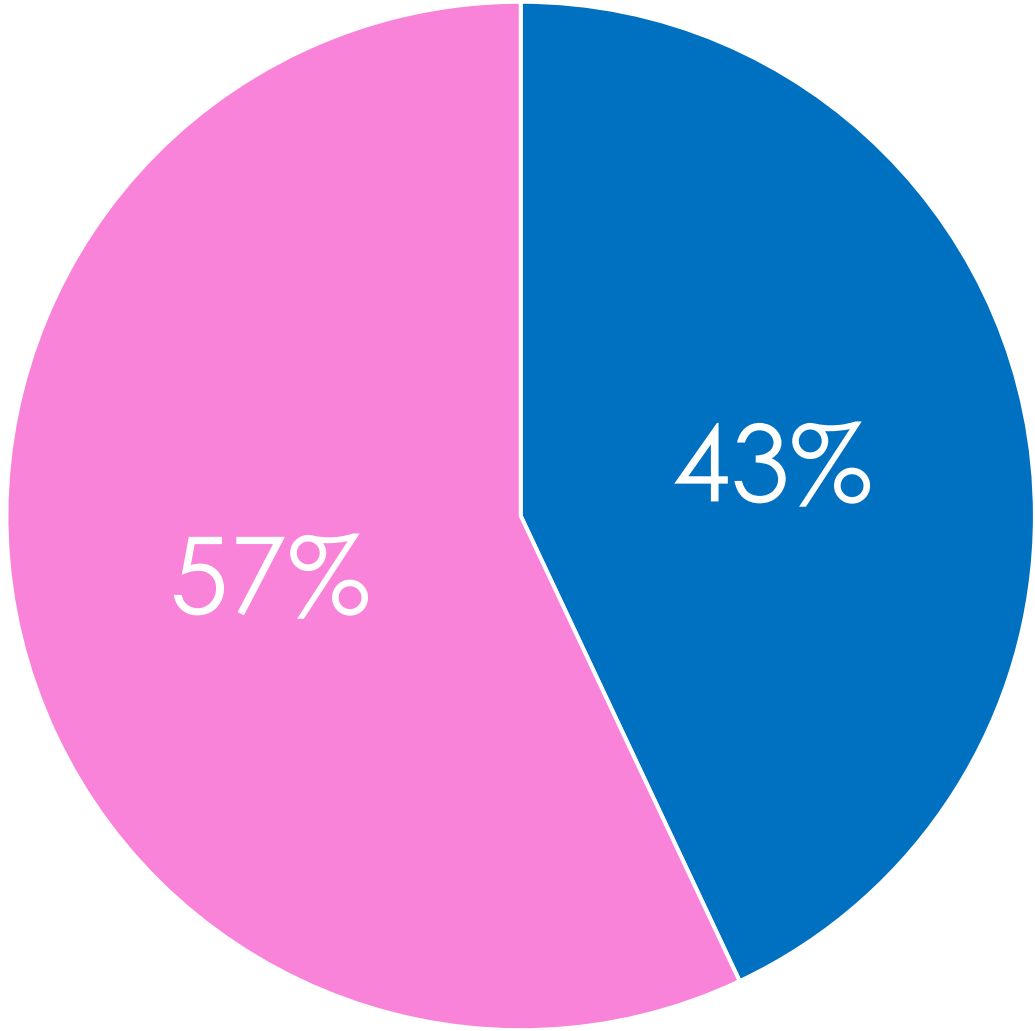


Generation



■ Millennial ■ Gen X ■ Boomer

Gender



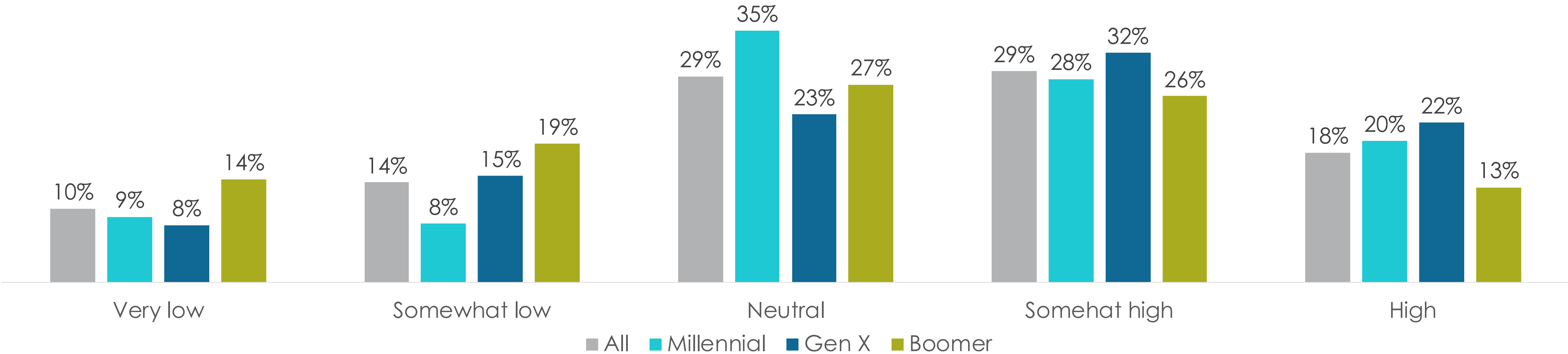
■ Male ■ Female



COVID-19 Hot Topics

Nearly half of respondents (47%) admit to having a stress level that is at least somewhat high.

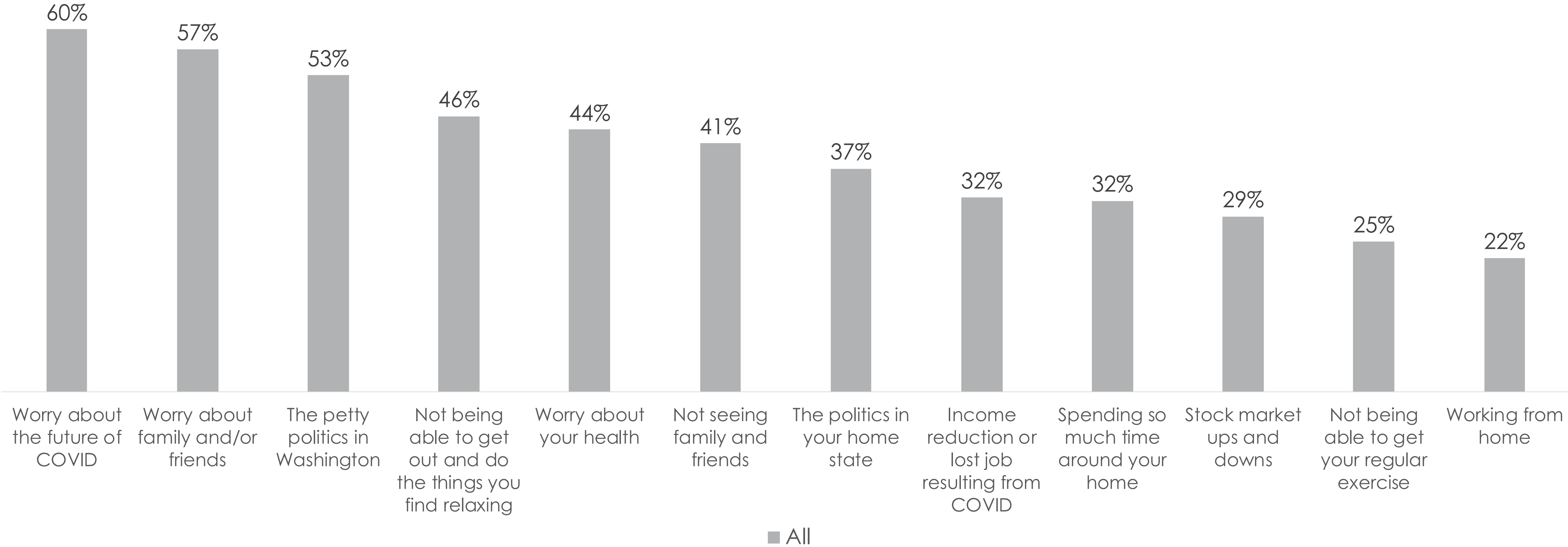
Stress level



How would you rate your overall stress level now?

The major contributors to people's stress levels are: the future of COVID (60%), concern about family or friends (57%) and the political environment in Washington, D.C. (53%).

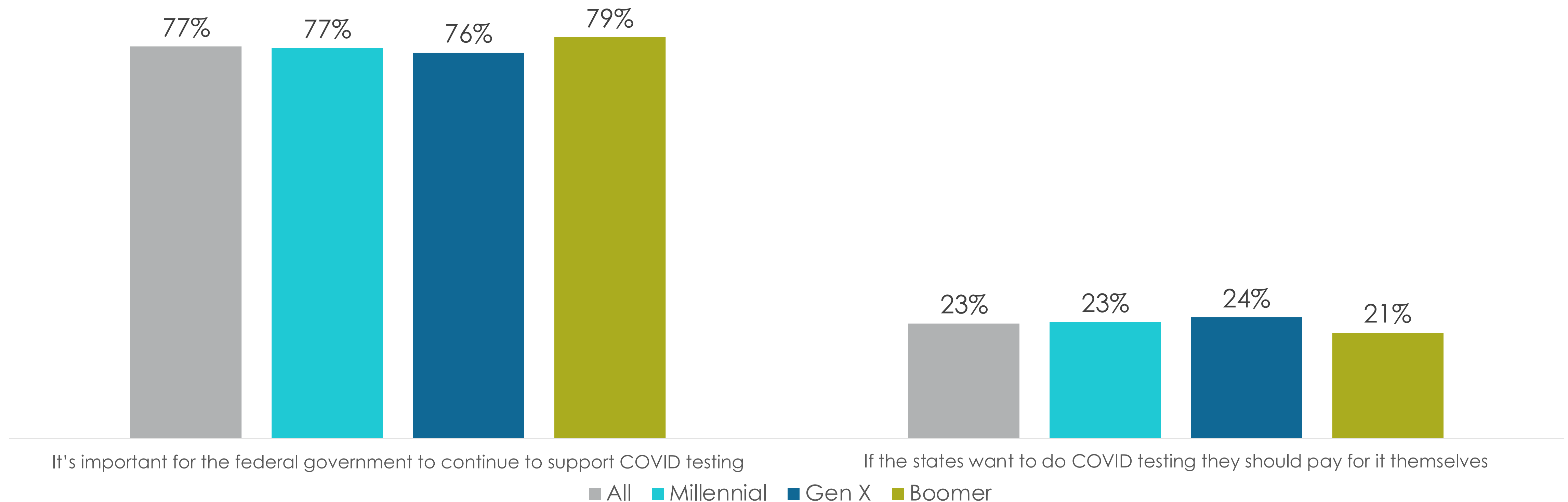
Factors that have added to stress level



During the COVID related shelter in place orders how much have the following added to the stress level you feel?

More than three-quarters of respondents feel the federal government should continue the financial support it is providing states for COVID testing.

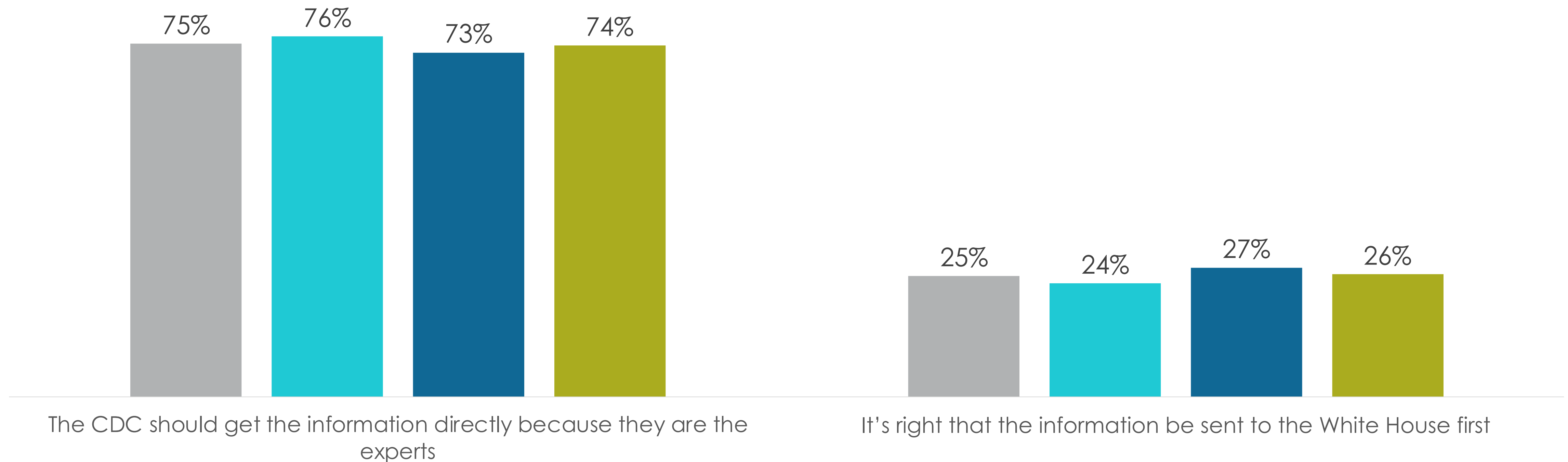
Feelings on the government stopping funding on Coronavirus testing



The federal government is considering stopping the funding it has been giving the states to conduct COVID testing. Which of the following best represents how you feel about that?

75% of respondents disagree with the White House's decision to route COVID data through Washington rather than having it go directly to the CDC in Atlanta.

Feeling on Coronavirus data going to the White House instead of the CDC



■ All ■ Millennial ■ Gen X ■ Boomer

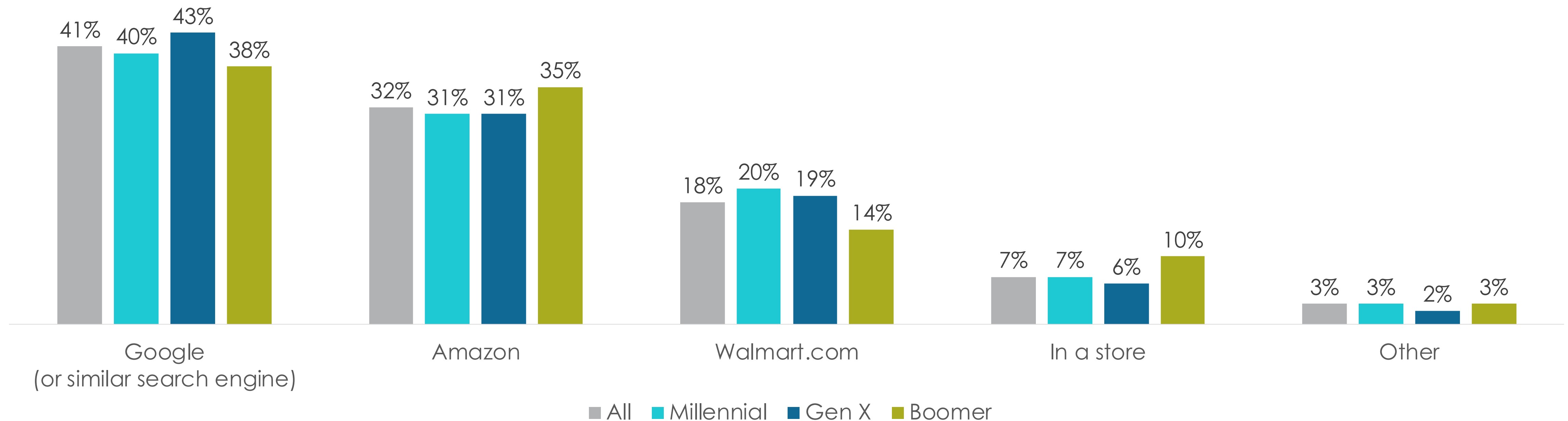
Which of the following best represents how you feel about the recent White House decision to have all COVID case information from hospitals sent directly to the White House rather than being sent to the CDC (Centers for Disease Control and Prevention)?



Walmart.com Shoppers

Despite being Walmart.com shoppers, when exploring a new category, most start with Google (41%) or Amazon (32%).

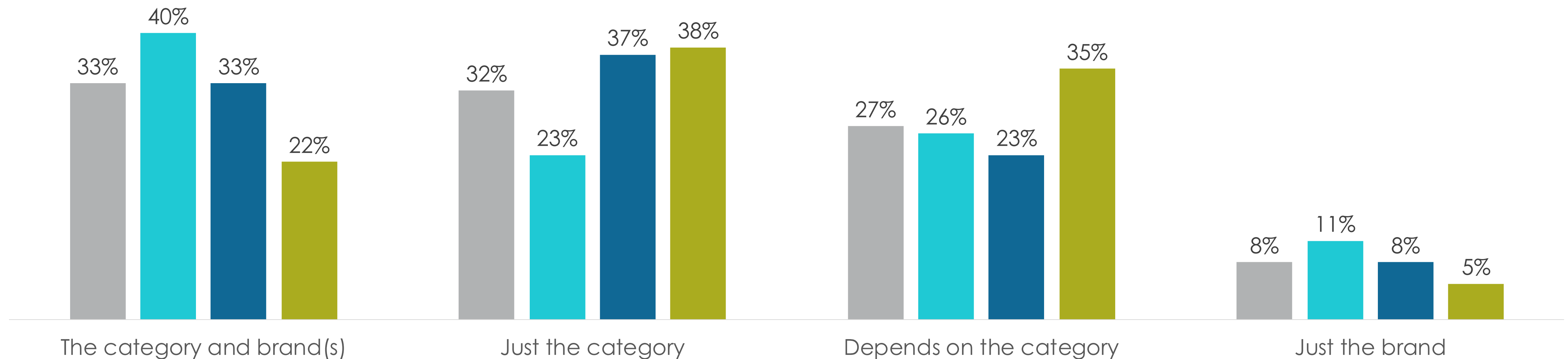
Starting point when not familiar with a product category



For a product category you're not familiar with (something new to you) where are you most likely to start your search?

Boomers are more than one-third less likely to search both category and brand and the most likely (35%) to modify their search behavior by category.

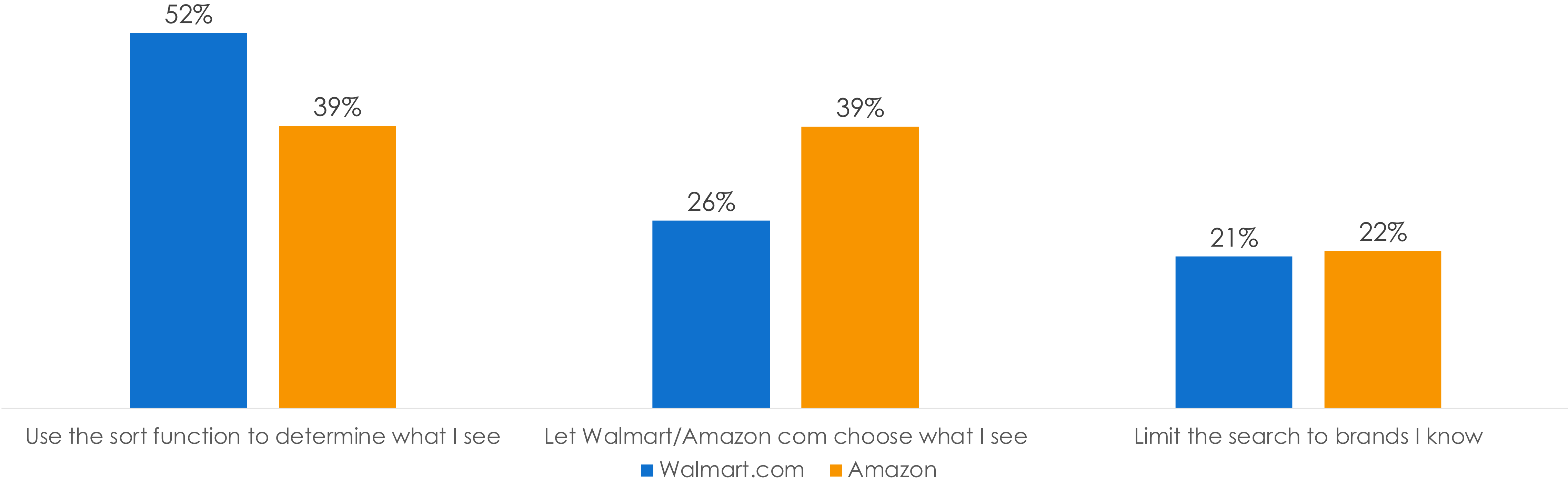
Using Walmart.com search bar



■ All ■ Millennial ■ Gen X ■ Boomer
When entering a search in the search bar on Walmart.com do you typically just specify the product category, or do you typically identify a category and a brand also, or just the brand?

Walmart.com shoppers are one-third (52% vs. 39%) more likely to use the sort function to determine the products they see, while Amazon users are 50% more likely to let the retailer define their options.

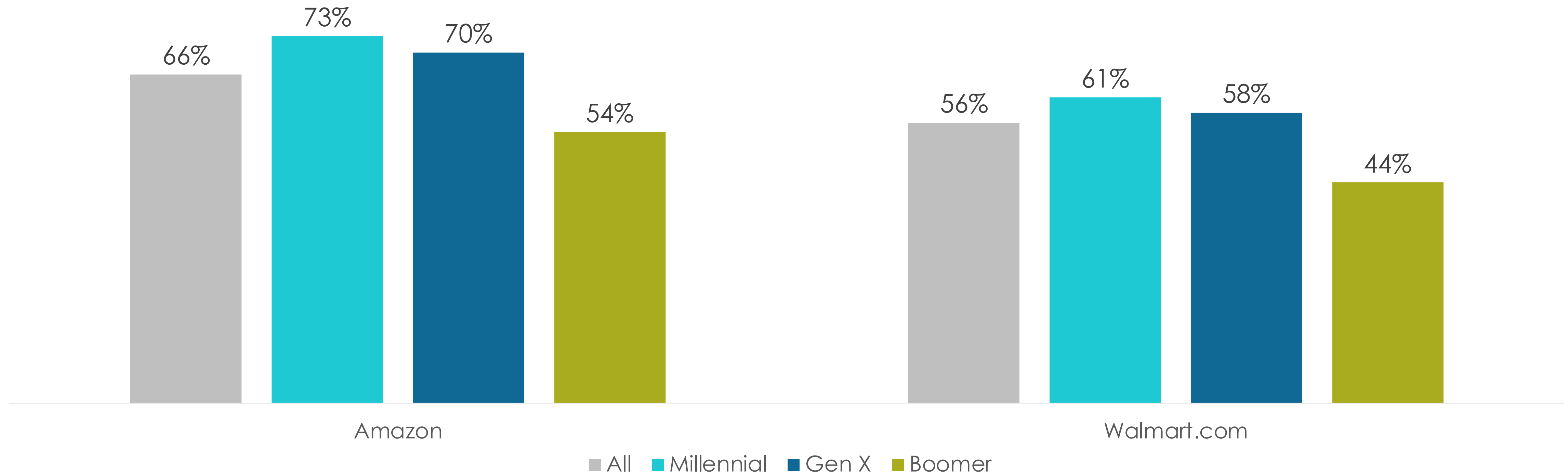
Searching methods



When doing a search on Amazon how do you typically go about it? When doing a search on Walmart.com how do you typically go about it?

Use of Amazon or Walmart.com as a source of information on products they plan to buy elsewhere is most common among the younger generations, particularly the Amazon shopper.

Use Amazon/Walmart.com to research a product planned to buy elsewhere

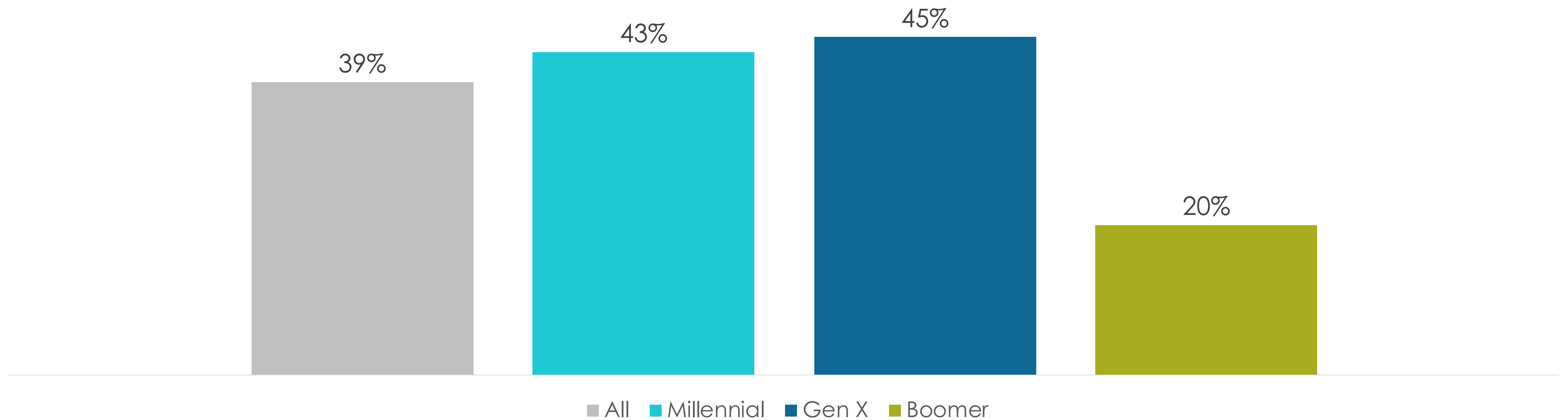


Do you ever use Amazon to research a product you plan to buy somewhere else?

Do you ever use Walmart.com to research a product you plan to buy somewhere else?

Boomers are less than half as likely (20% vs. 44%) as other generations to look at recommended and promoted products on Walmart.com.

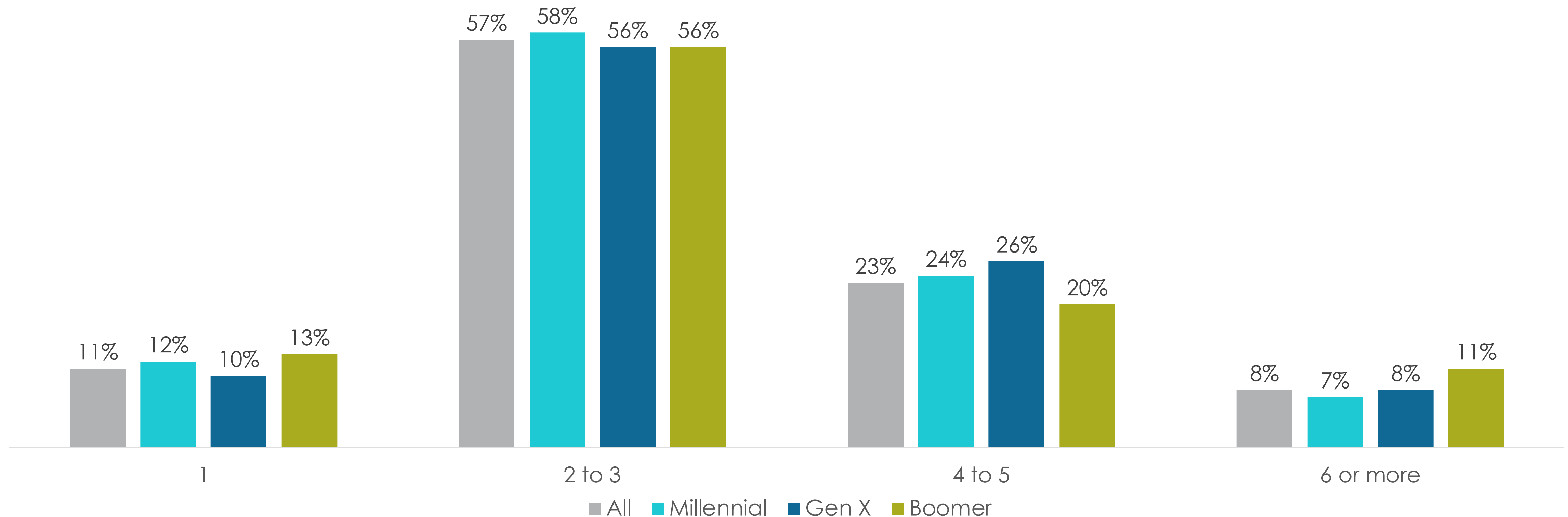
Frequently looking at recommended and promoted products on Walmart.com



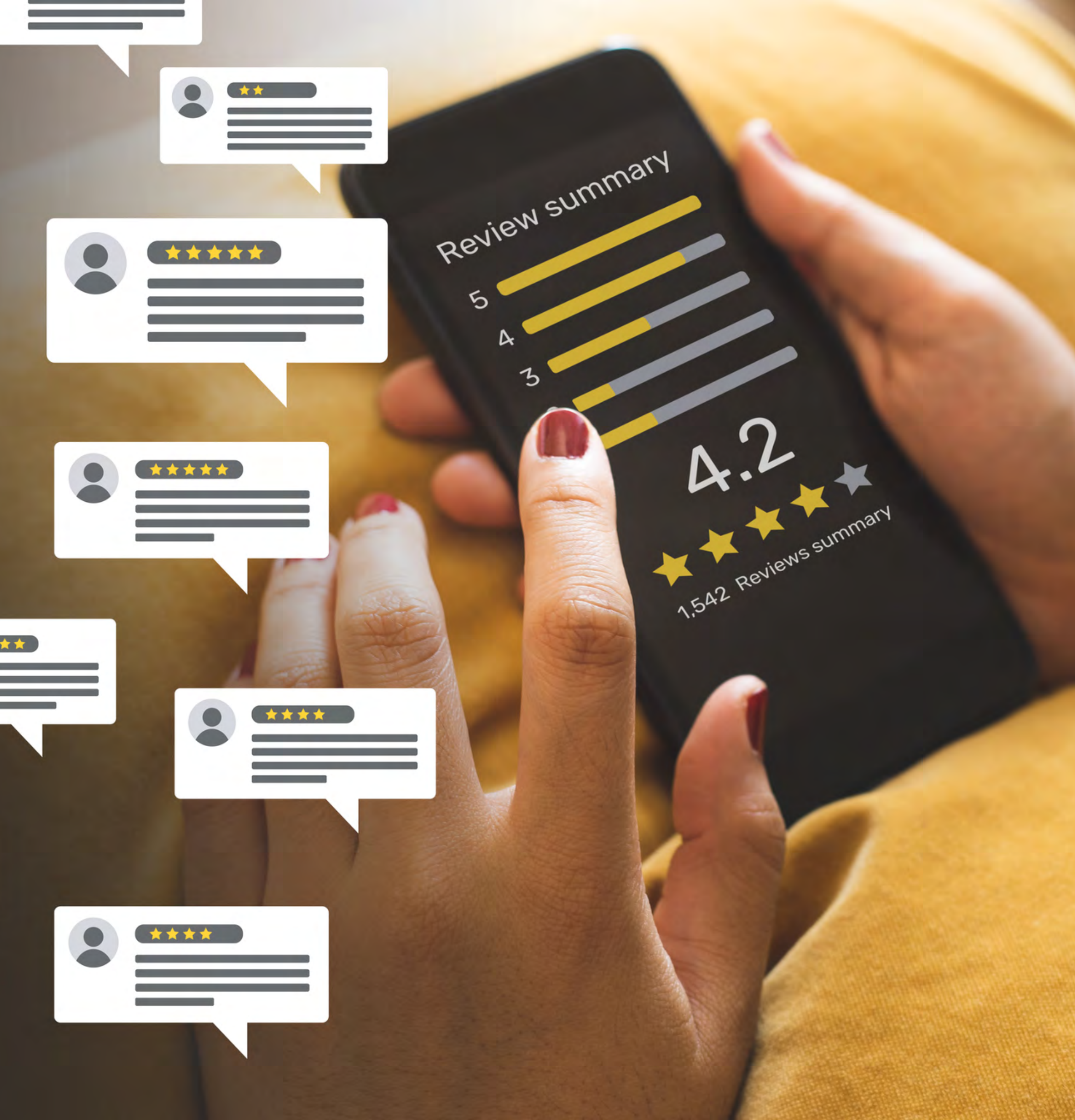
How frequently do you scroll through the Walmart.com home page to see recommended and promoted products?

More than two-thirds (68%) of Walmart.com shoppers find a product within the first three pages viewed with very little variation by generation.

Walmart.com pages typically gone through to find a product

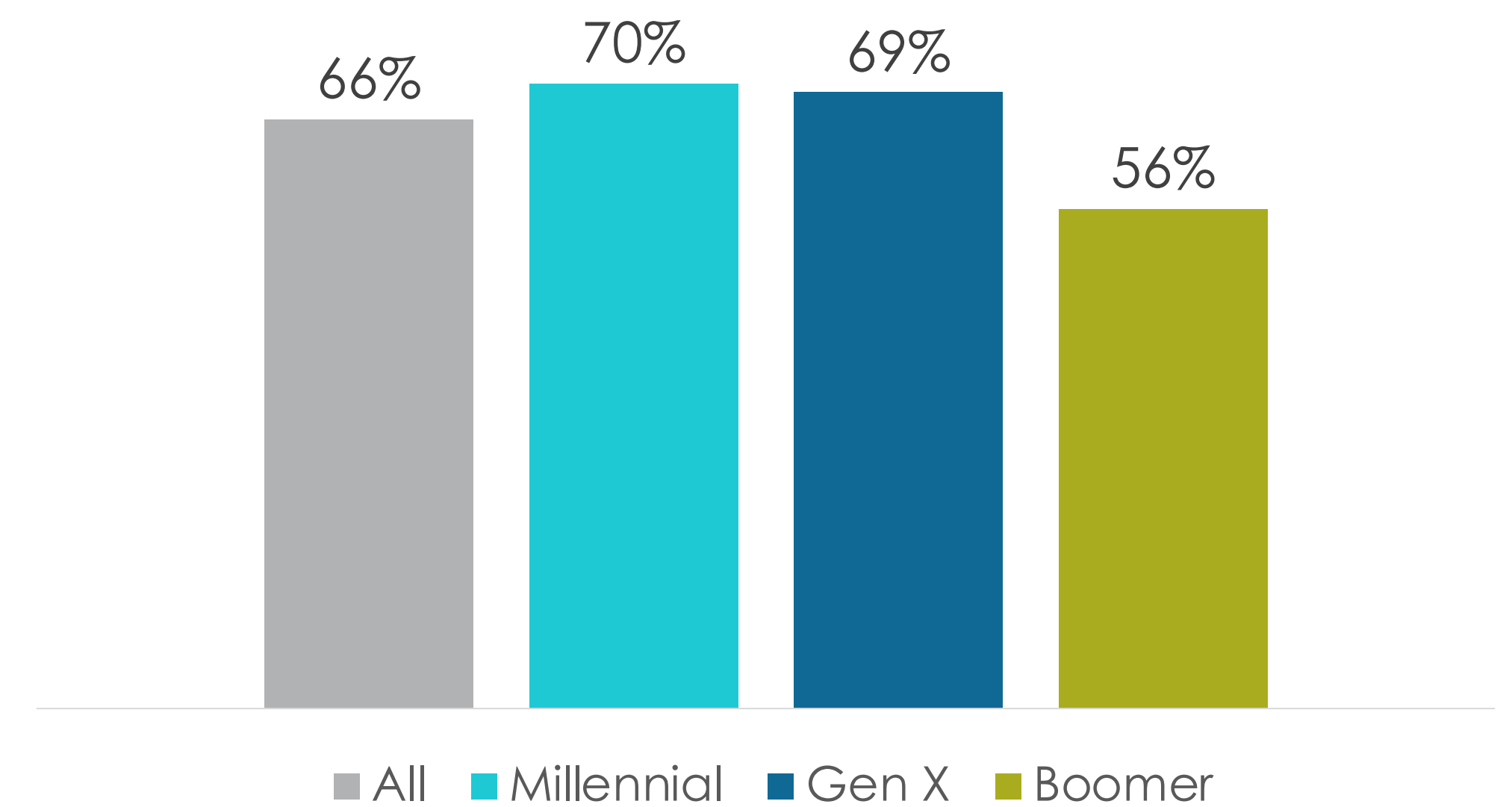


How frequently do you scroll through the Walmart.com home page to see recommended and promoted products?



Star ratings influence the purchases of nearly two-thirds of respondents, but only 56% of Boomers.

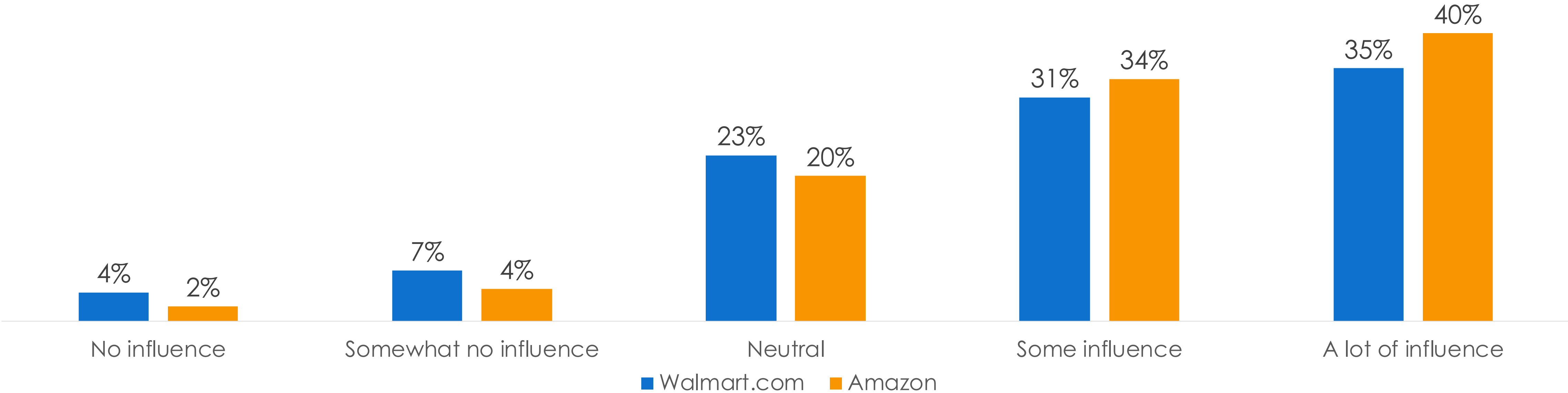
Star rating influence on decision of what to buy



How much influence do star ratings have in helping you determine what to buy?

Star ratings carry more weight with the Amazon shopper. 74% are influenced by the ratings while only 66% of Walmart.com shoppers feel the same.

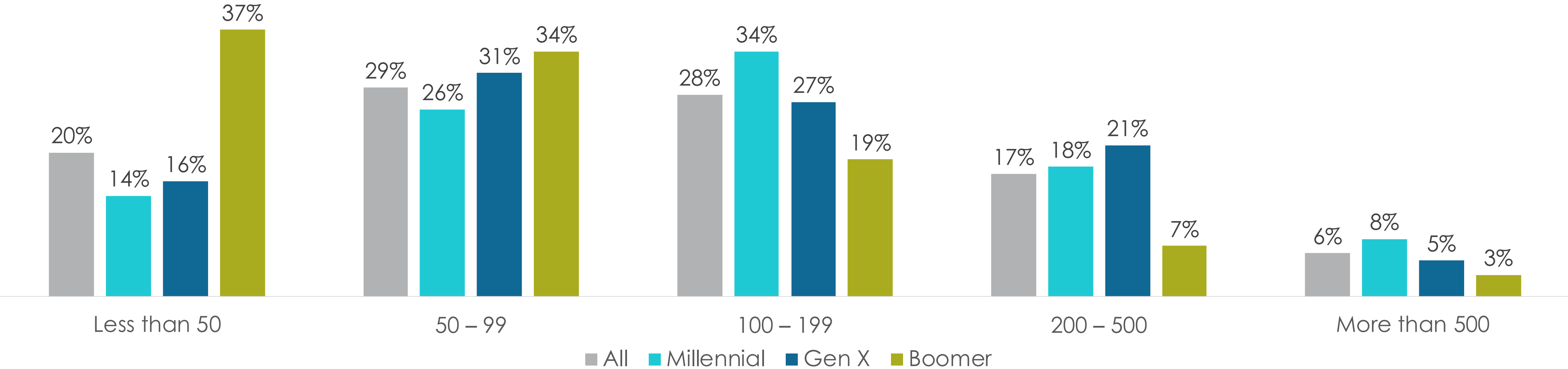
Star rating influence on decision of what to buy



How much influence do star ratings have in helping you determine what to buy?

37% of Boomers are satisfied with fewer than 50 ratings, more than twice that of the other generations (15%).

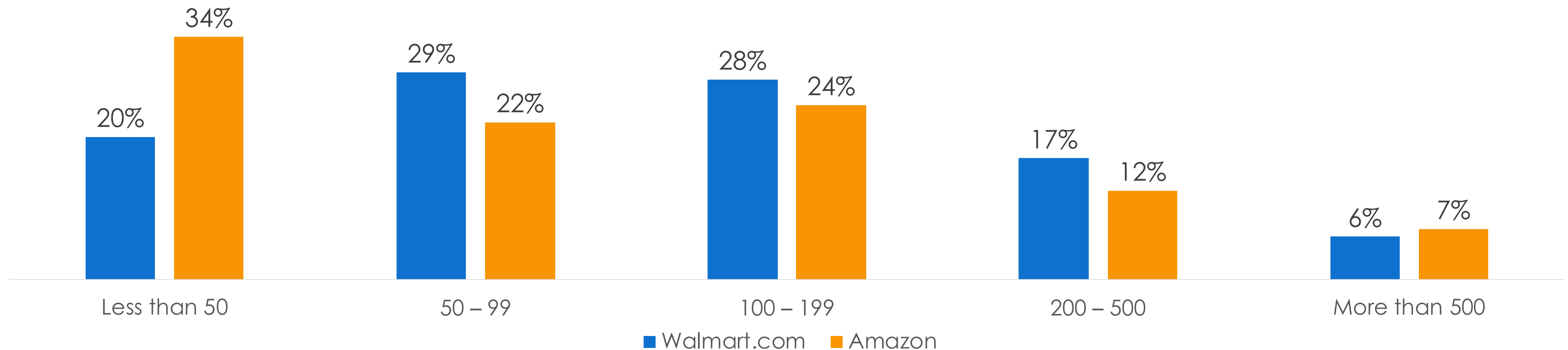
Number of ratings to make a product believable on Walmart.com



How many ratings does a product have to have in order for you to find it believable?

More than one-third (34%) of Amazon shoppers are satisfied with fewer than 50 ratings, while that is true for only 1 in 5 Walmart.com shoppers.

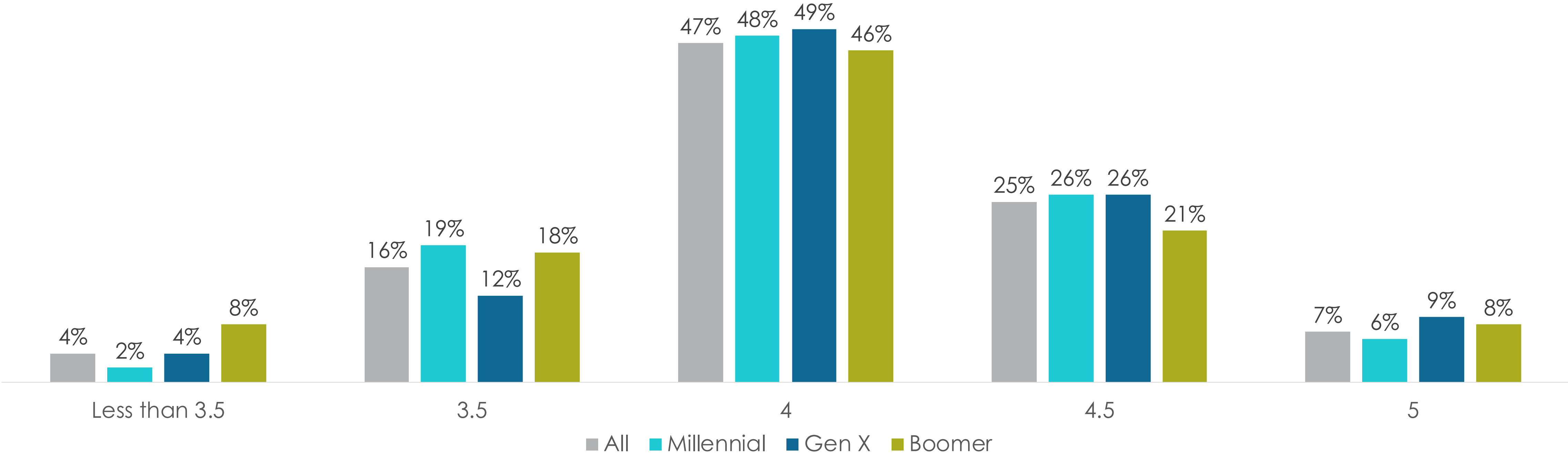
Number of ratings to make a product believable



How many ratings does a product have to have in order for you to find it believable?

Similar to Amazon, 79% of Walmart.com shoppers are looking for a star rating of 4 or higher.

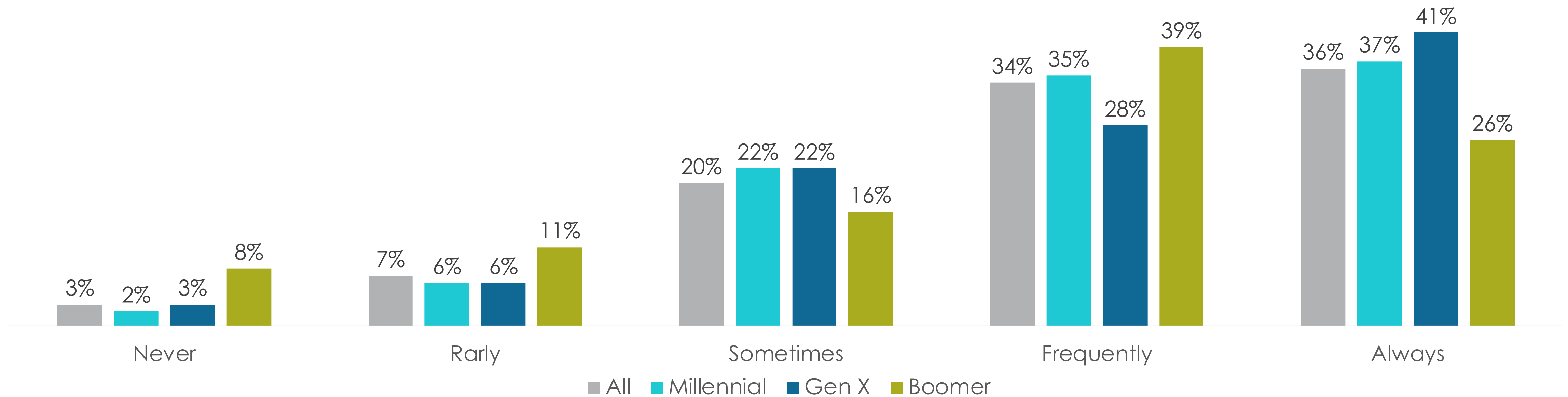
Level of star rating to consider purchasing a product



How high of a star rating does a product have to have for you to consider purchasing it?

Product review consumption is high, with 70% of respondents reading reviews frequently or always.

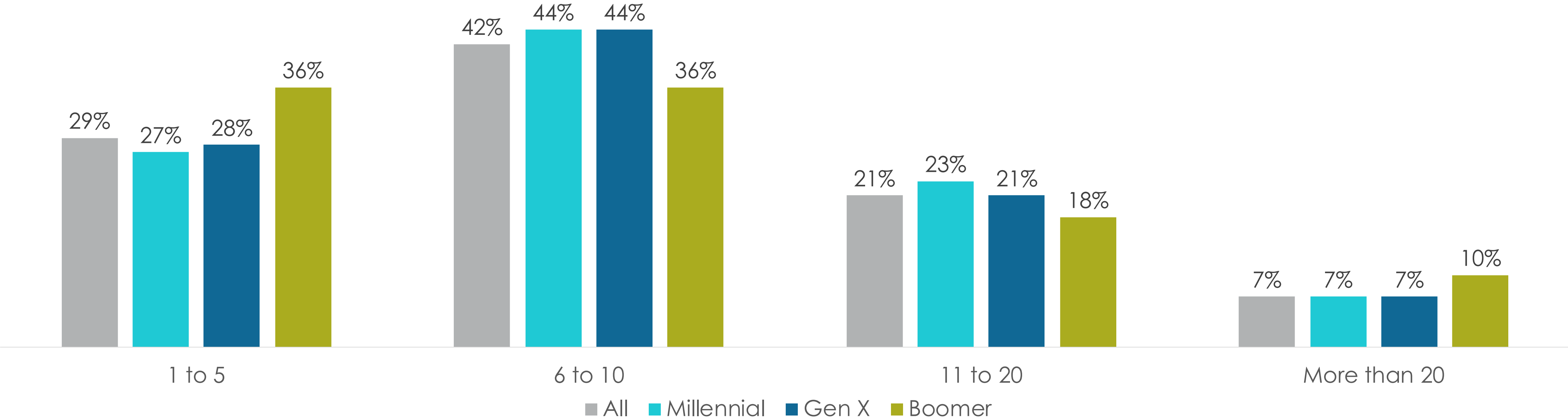
Frequency of reading product reviews



How frequently do you read product reviews?

For the majority (71%) of Walmart.com shoppers, reading 10 or fewer reviews is sufficient to make up their mind on a product.

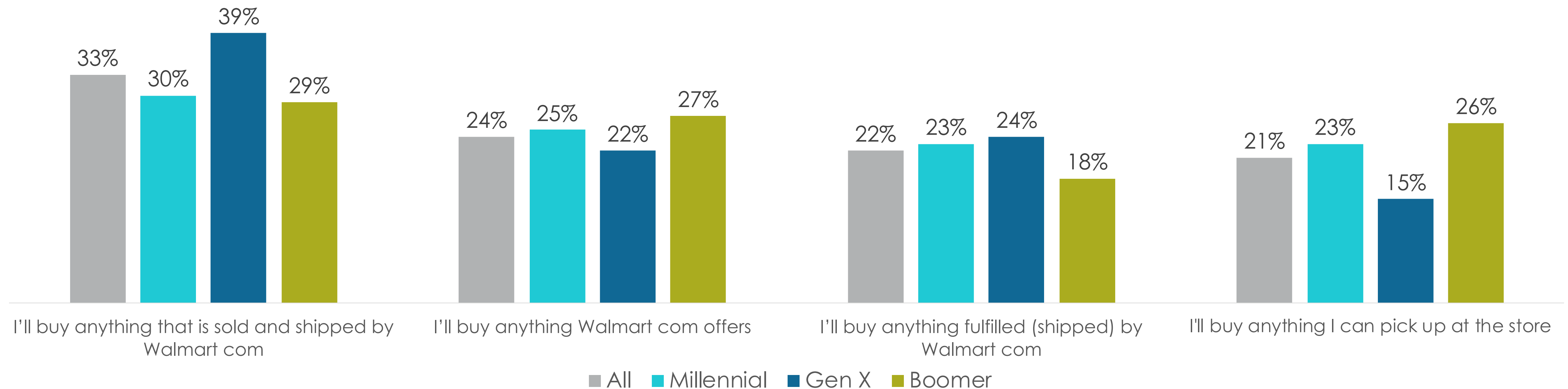
Number of reviews typically read



How many reviews do you typically read?

Attitudes about the product source for purchases made on Walmart.com vary significantly, with the most popular (33%) being anything sold and shipped by Walmart.

Description of how one shops on Walmart.com

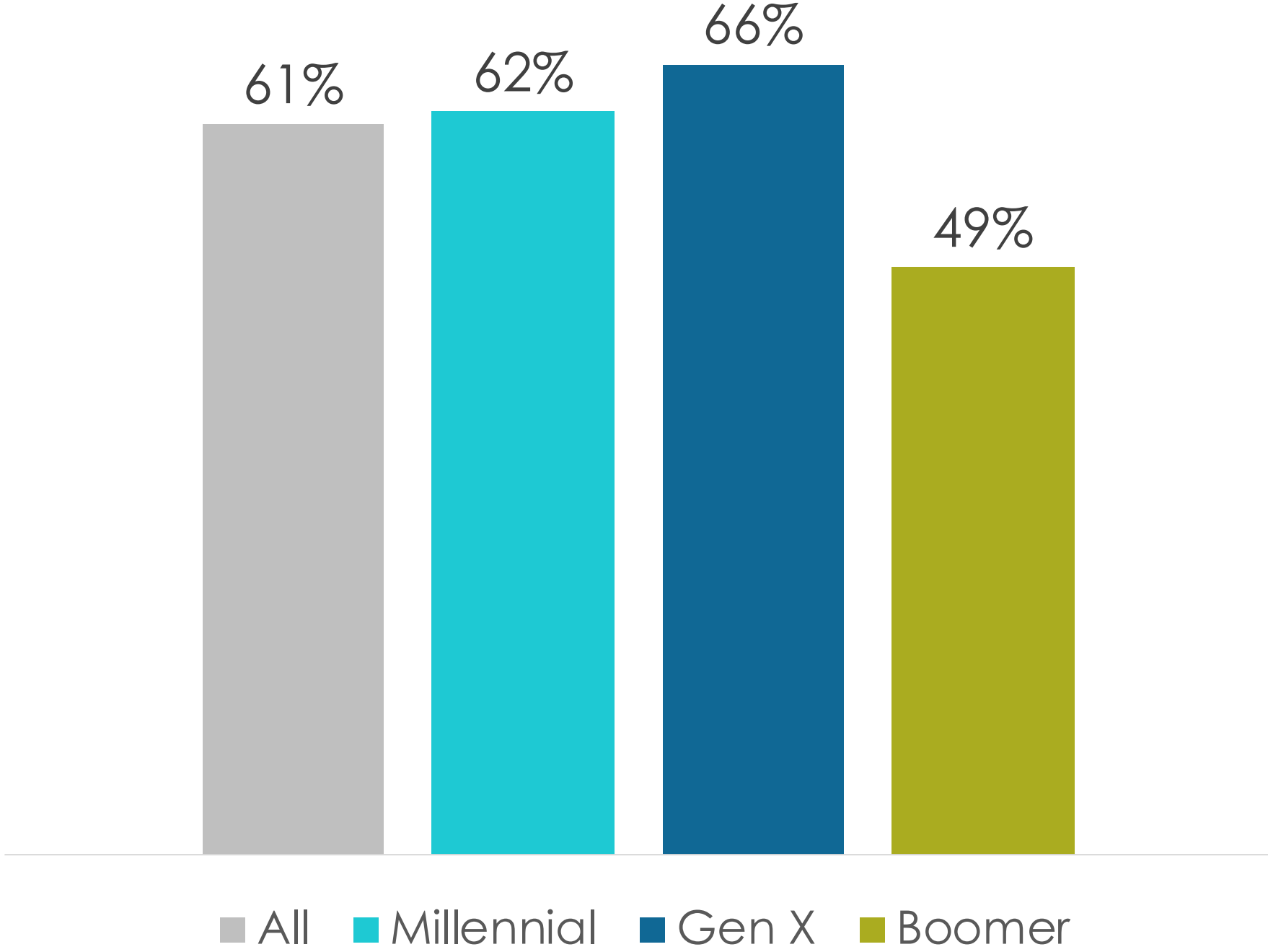


Which of the following best describes how you shop on Walmart.com?



Similar to those who shop Amazon, 61% of Walmart.com shoppers are confident they're always getting the best price. Boomers are the most skeptical at 49%.

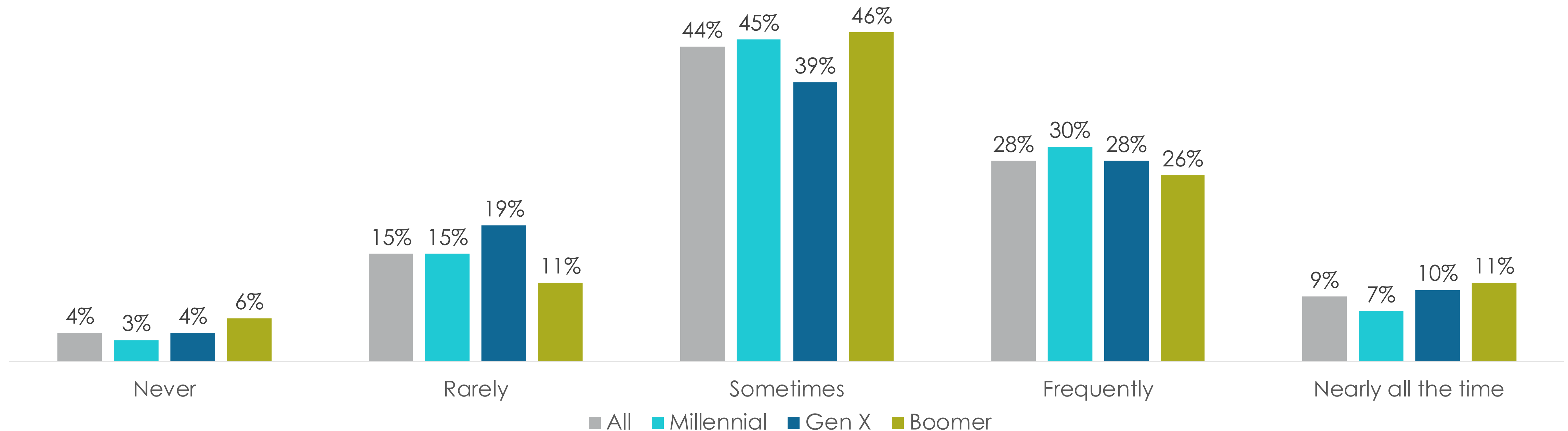
Confident that Walmart.com is giving the best possible price



How confident are you that Walmart.com is giving you the best possible price?

Despite the high confidence level, 81% of respondents are shopping elsewhere at least some of the time to see if they can beat the Walmart.com price.

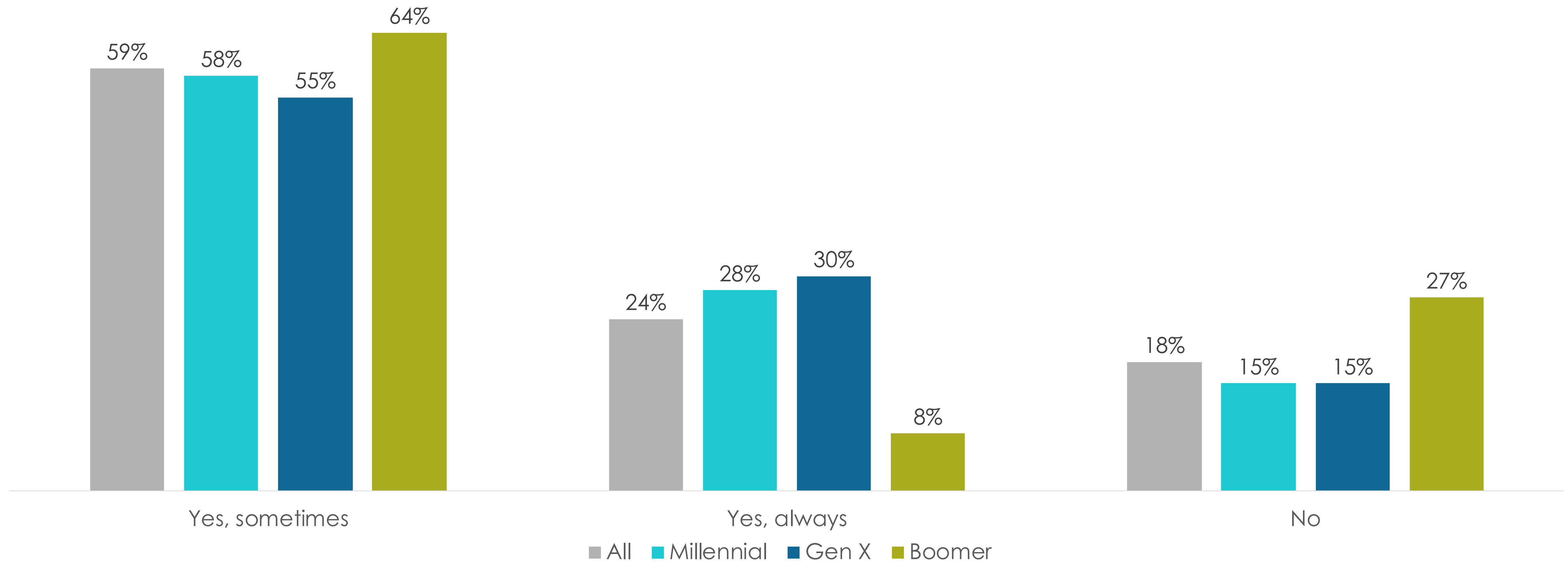
Frequency of shopping elsewhere to locate a better price than Walmart.com



How often do you shop elsewhere to see if you can find a better price than Walmart.com?

Fewer than 1 in 5 people (18%) never use Walmart.com to do price checks on products found elsewhere.

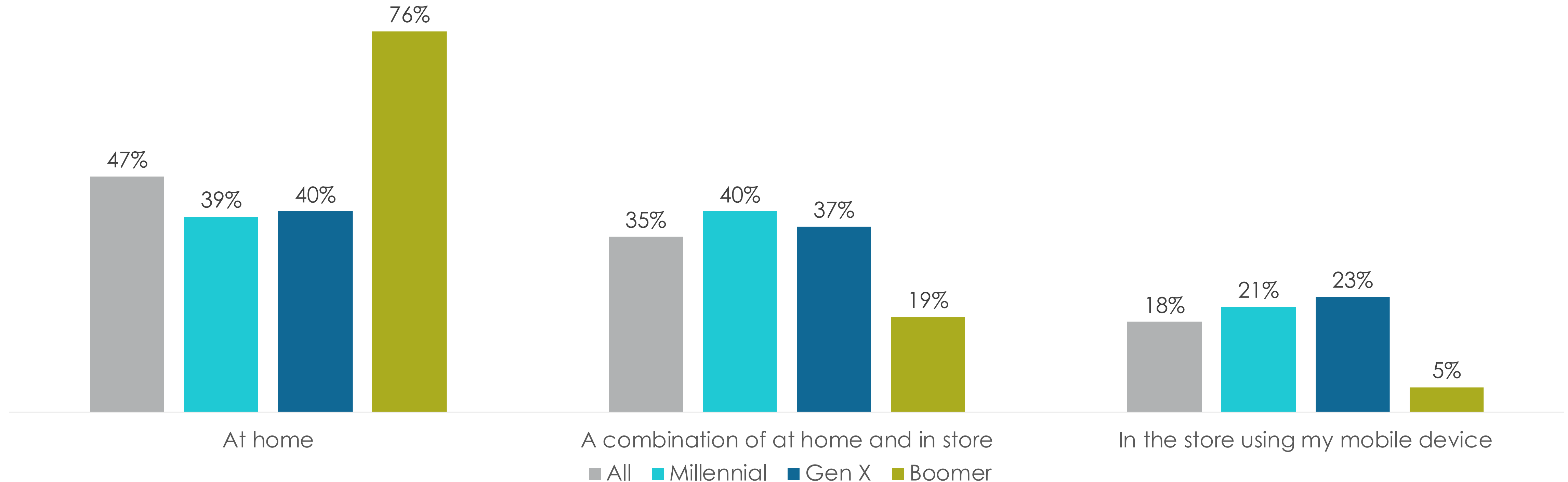
Use Walmart.com to do price checks



Do you use Walmart.com to do price checks on products you find in other places?

Boomers (76%) are by far the most likely to exclusively be doing price checks from the comfort of their home, while Millennials (61%) and GenXers (60%) are doing at least a portion of price checks in store.

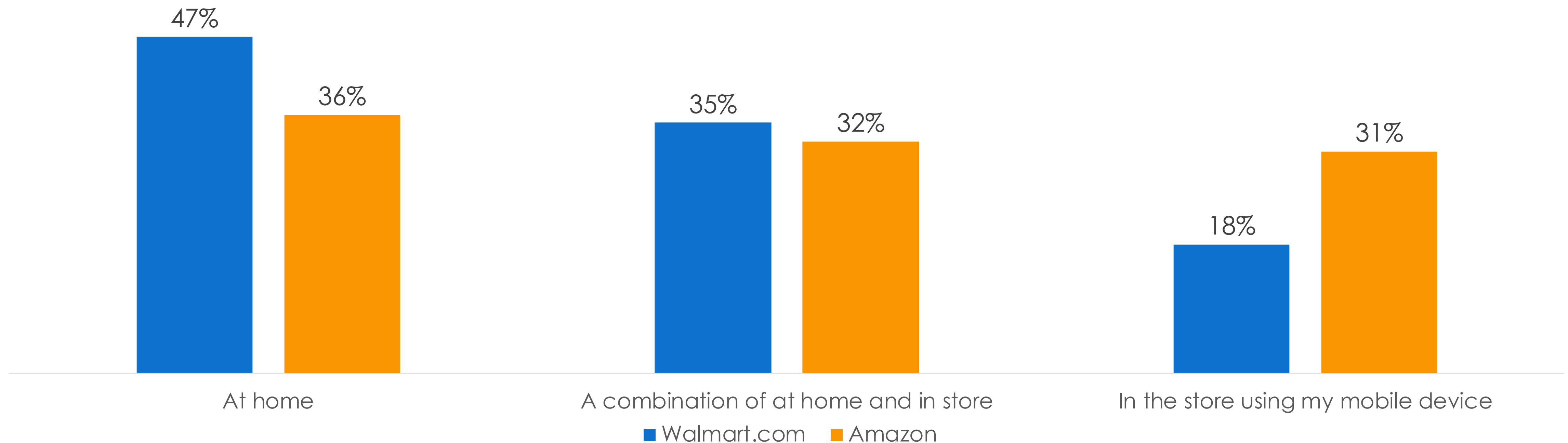
Method of price checks on Walmart.com



How do you typically do the price checks on Walmart.com?

Walmart.com shoppers (47%) are much more likely than their Amazon counterparts (36%) to be doing their price checks from home.

Method of price checks on Amazon/Walmart.com



How do you typically do the price checks on Walmart.com?

How do you typically do the price checks you use Amazon for?

Summary

Some interesting points arose when we inquired about current COVID hot topics:

- Nearly half of respondents (47%) admit to having a stress level that is at least somewhat high.
- The major contributors to stress levels are: the future of COVID (60%), concern about family or friends (57%) and the political environment in Washington, D.C. (53%).
- More than three-quarters of respondents feel the federal government should continue the financial support it is providing states for COVID testing.
- 75% of respondents disagree with the White House decision to route COVID data through Washington rather than having it go directly to the CDC in Atlanta.

While many online shopping behaviors are similar, we noticed some interesting differences between shopping at Amazon and Walmart.com.

- Despite being Walmart.com shoppers, most start category searches at Google (41%) or Amazon (32%).
- Boomers are much less likely than other generations to be searching for both category and brand, but the most likely (35%) to modify their approach based on the category.

Summary - Continued

- Walmart.com shoppers (52%) are one-third more likely than Amazon shoppers (39%) to use the sort function to determine what they see.
- Use of Amazon or Walmart as a source of information on products they plan to buy elsewhere is much less common among Boomers than other generations.
- Boomers are less than half as likely (20% v. 44%) as other generations to look at recommended and promoted products on Walmart.com.
- Most Walmart.com shoppers (68%) typically find a product they're satisfied within the first 3 pages they visit.
- Star ratings influence the purchases of more two-thirds of GenXers and Millennials, but only 56% of Boomers.
- Star ratings carry more weight with the Amazon shopper. 74% of Amazon shoppers say that they are influenced by star ratings vs. 66% of Walmart.com shoppers.
- 37% of Boomers are satisfied with fewer than 50 ratings, more than twice that of the other generations (15%).
- More than one-third (34%) of Amazon shoppers are satisfied with fewer than 50 ratings, while that is true for only 1 in 5 Walmart.com shoppers.
- Similar to Amazon, 79% of Walmart.com shoppers are looking for a star rating of 4 or higher.

Summary - Continued

- Product review consumption is high, with 70% of respondents reading reviews frequently or always.
- For the majority (71%) of Walmart.com shoppers, reading 10 or fewer reviews is sufficient to make up their mind on a product.
- One-third of Walmart.com shoppers will only buy products sold and shipped by Walmart.
- Like those who shop Amazon, two-thirds of Walmart.com shoppers are confident they're always getting the best price.
- However, 81% of Walmart.com shoppers are browsing elsewhere at least some of the time to see if they can beat the Walmart price.
- Fewer than 1 in 5 people (18%) are never using Walmart.com to do price checks on products found elsewhere.
- Boomers are using Walmart.com to check prices on products found elsewhere primarily from home (76%). A majority of the other generations are using their mobile device at least some of the time.
- Walmart.com shoppers (47%) are much more likely than their Amazon counterparts (36%) to be doing their price checks from home.