



COVID-19 U.S. CONSUMER IMPACT TRACKING STUDY – WEEK 25

PRESENTED AUGUST 25, 2020

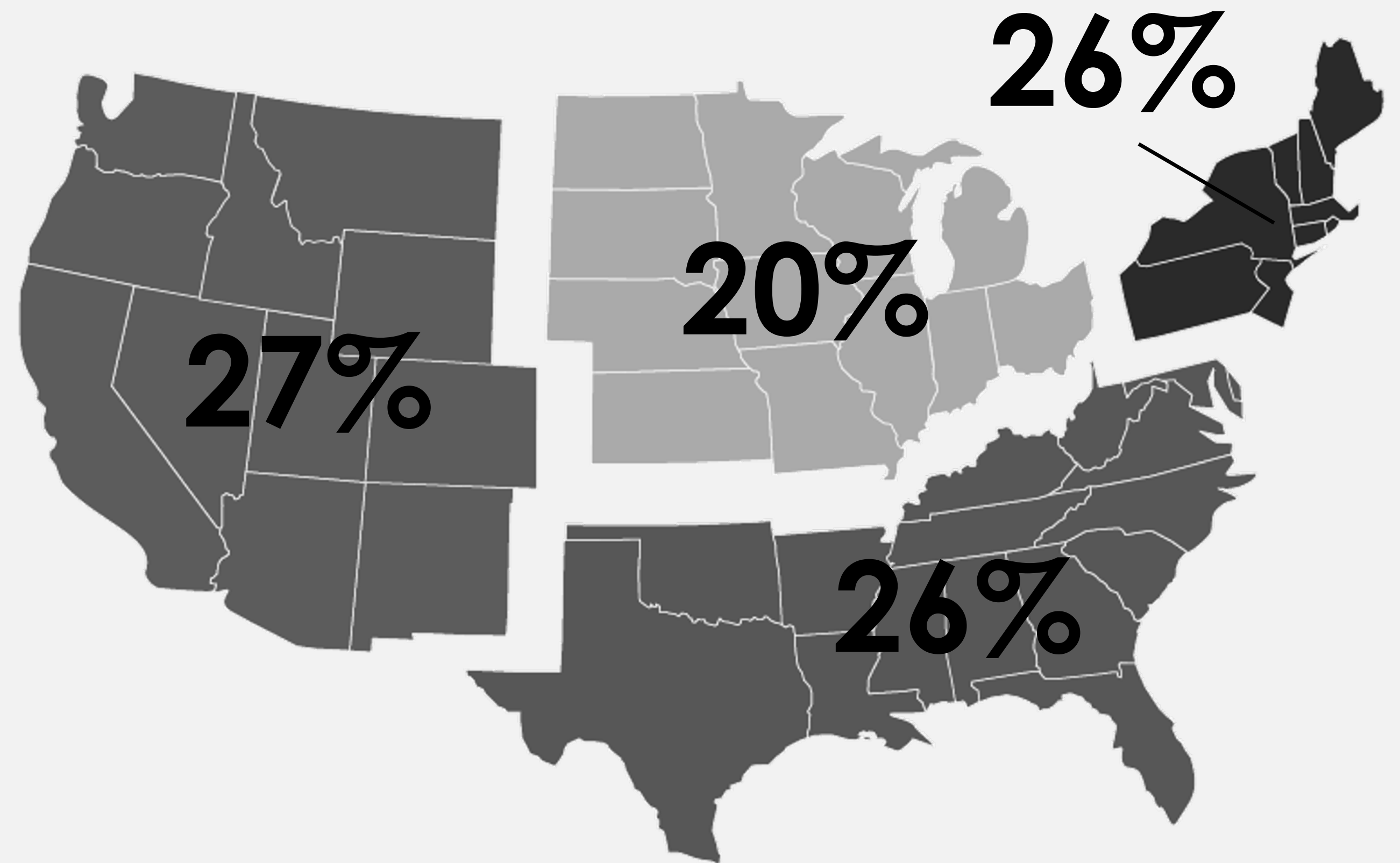
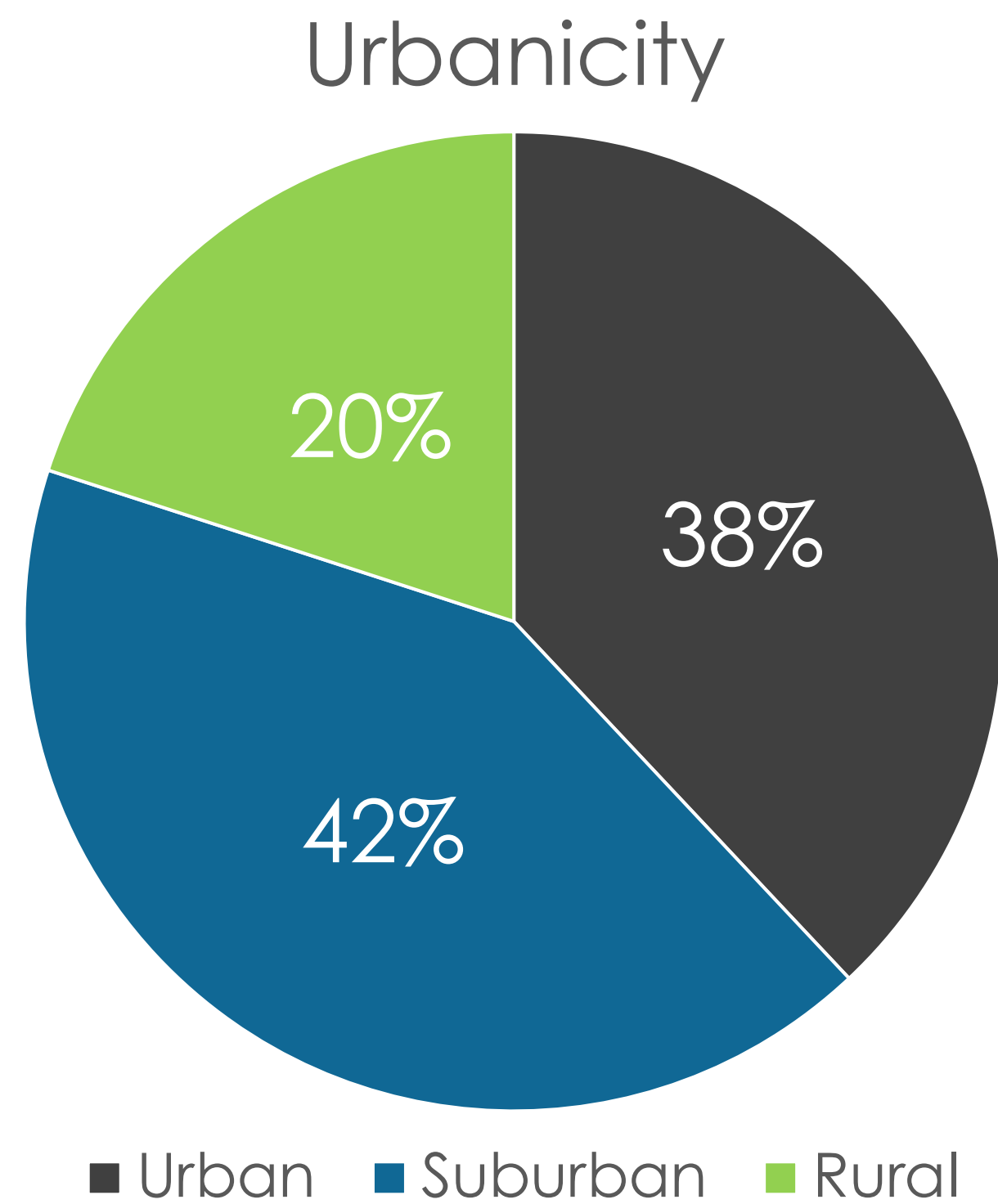
Methodology

- N = 1,001
- MOE = $\pm 3.1\%$
- Panel: General Population
- Collected: 08/14/20, 08/15/20

- N = 592
- MOE = $\pm 4.03\%$
- Panel: General Population
- Collected: 08/20/20, 08/21/20

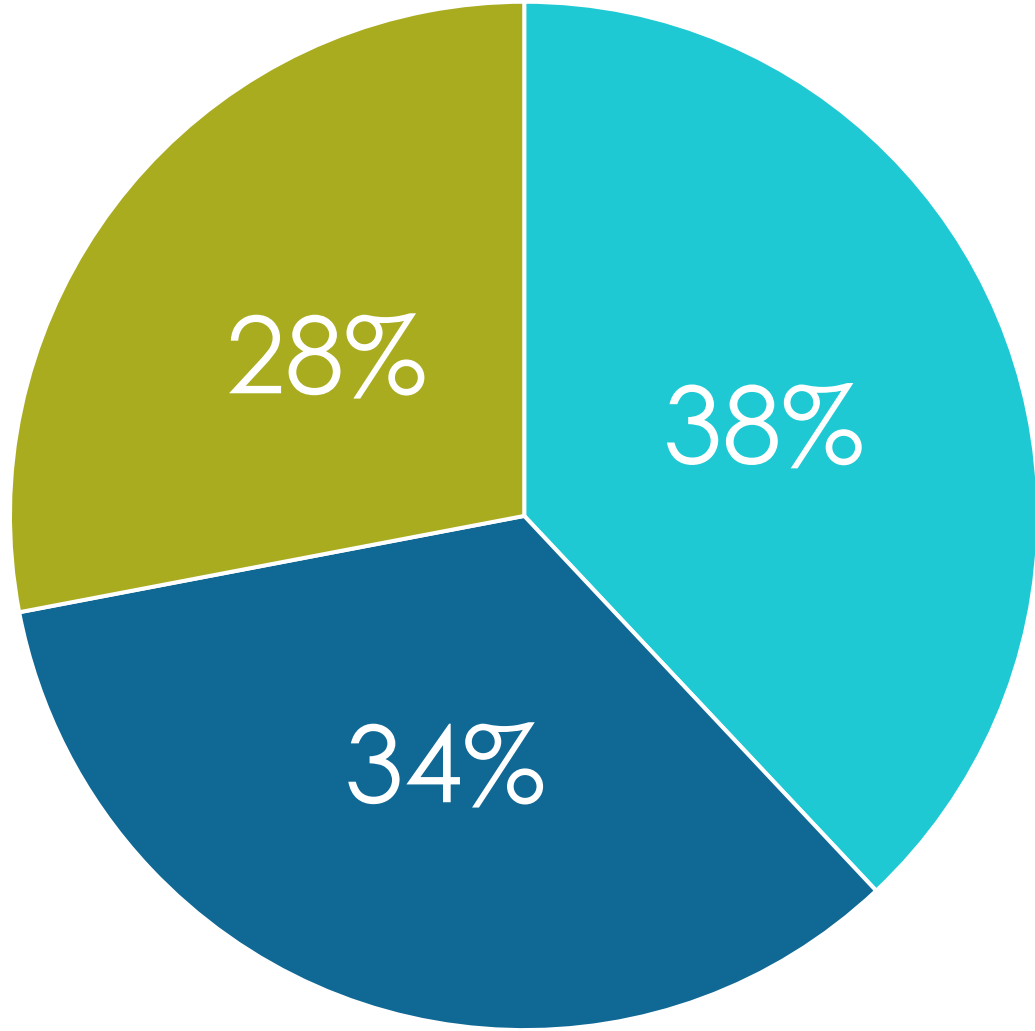


Panel Composition



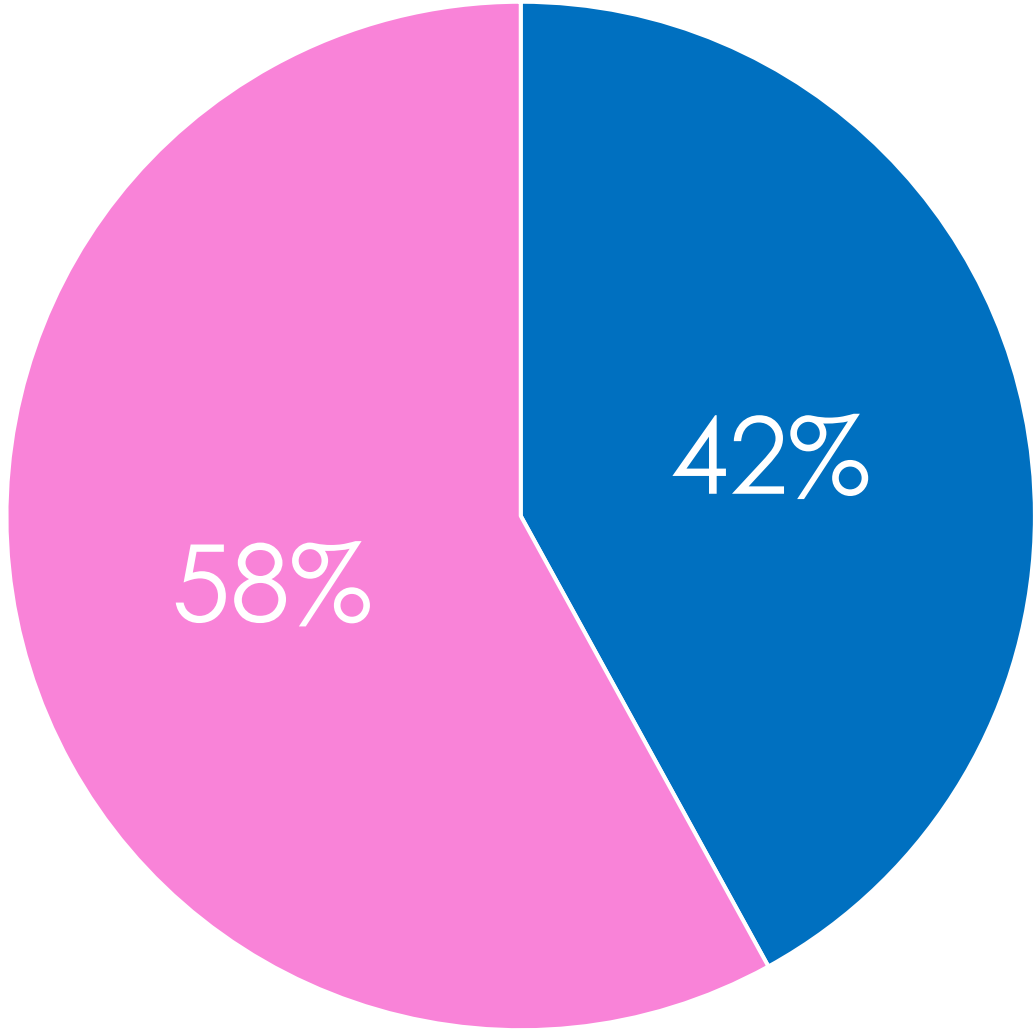


Generation



■ Millennial ■ Gen X ■ Boomer

Gender



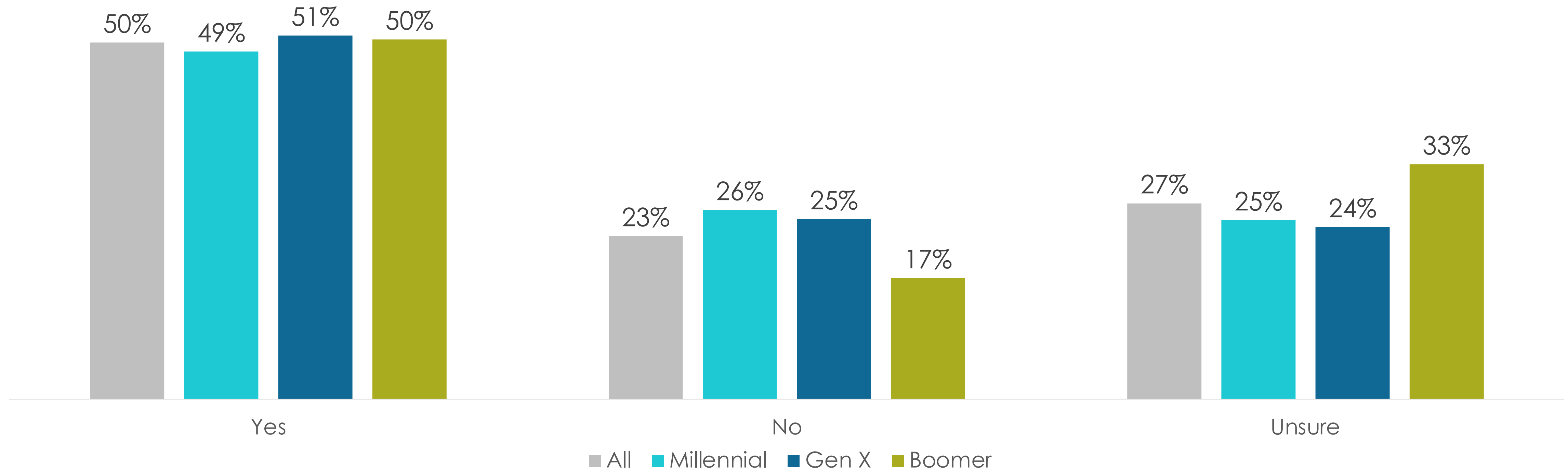
■ Male ■ Female



COVID-19 – Hot Topics

Only half the respondents assert they will get a Coronavirus vaccine if one becomes available. 27% are unsure what they will do and 23% say they will not get a vaccine.

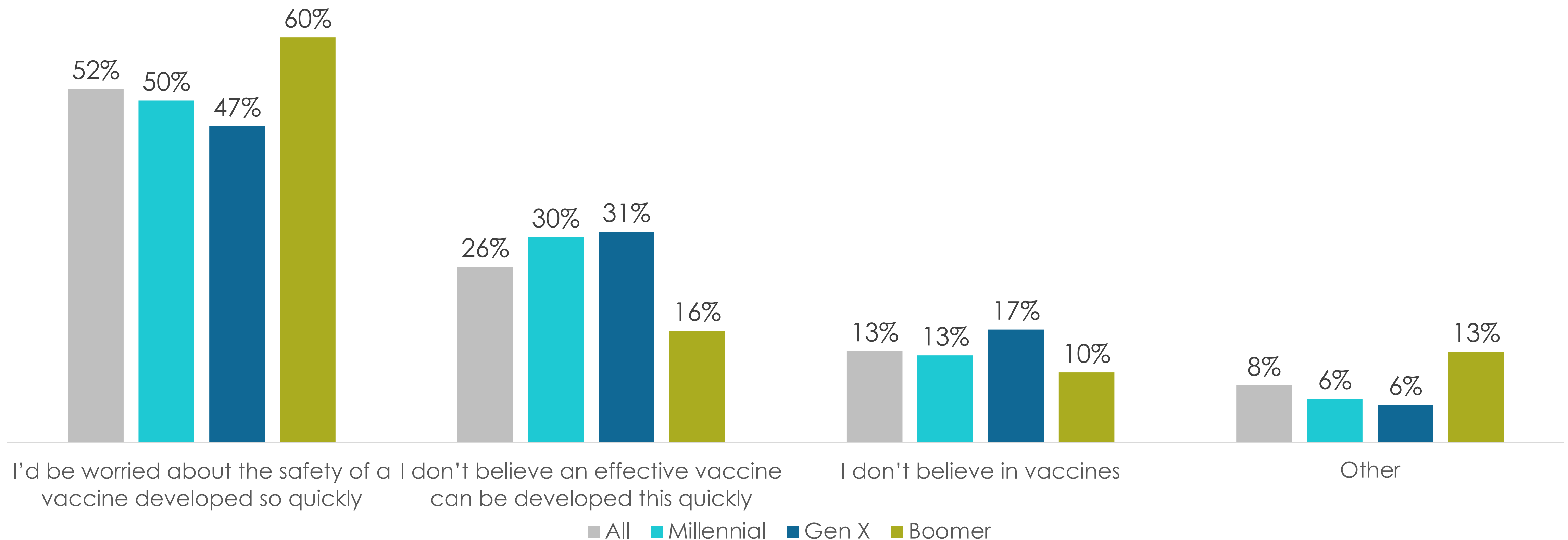
Willing to get the Coronavirus vaccine



Will you get a COVID vaccine if one becomes available?

Among those unsure or unwilling to get a vaccine, the biggest concern (52%) is the safety of a vaccine developed so quickly. Only 13% say they don't believe in vaccines.

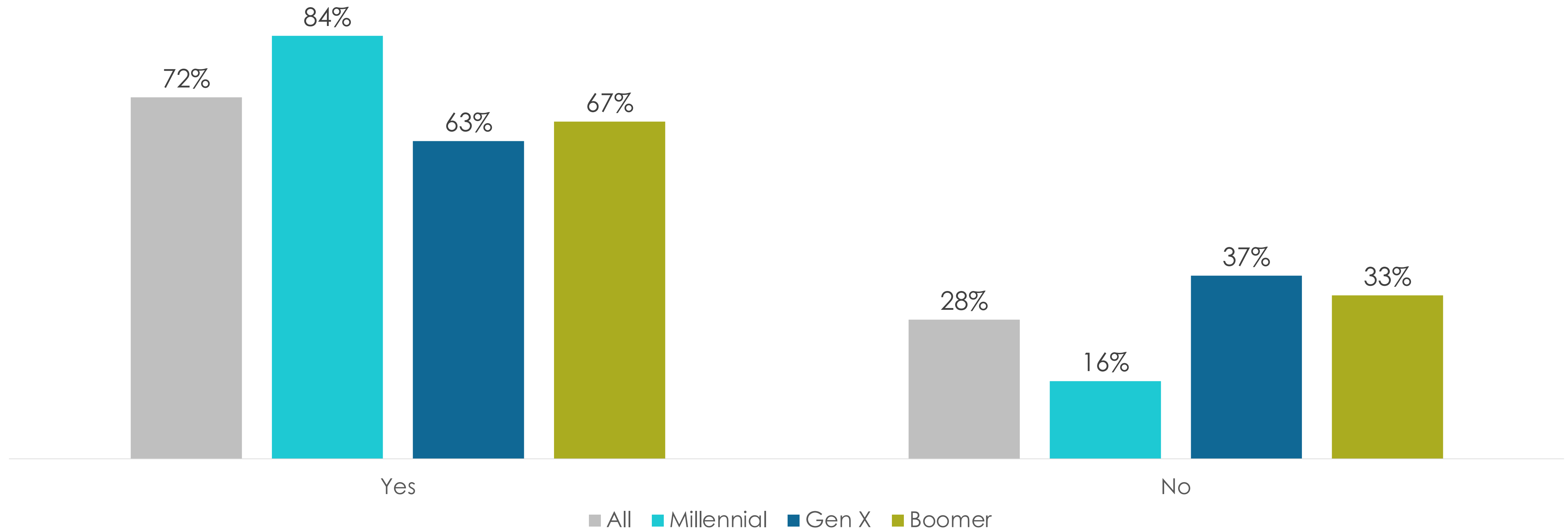
Reasons for being against/unsure about Coronavirus vaccines



Which of the following best describes why you are against or unsure about a COVID vaccine?

Of the 50% who will get a vaccine, 72% believe the government should make it mandatory.

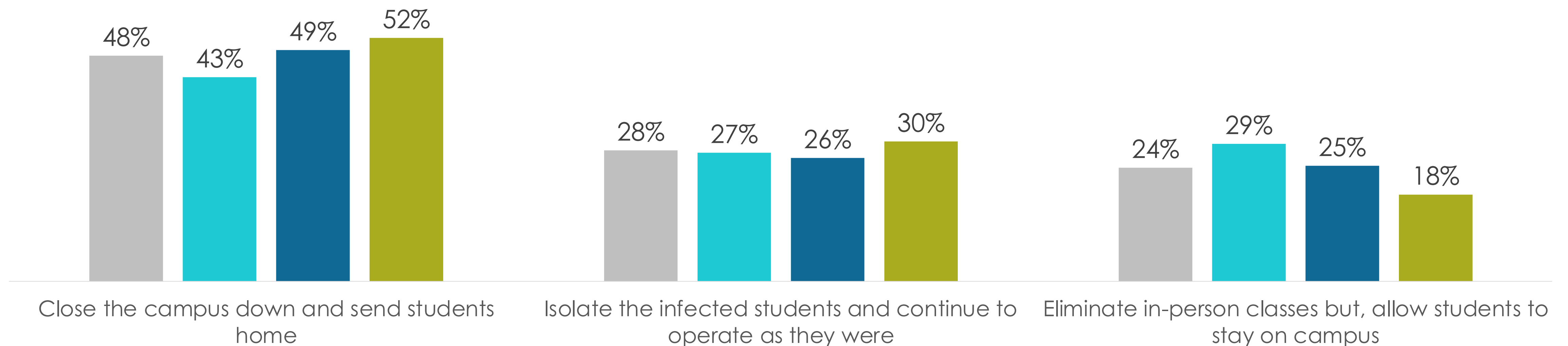
Should the government require Coronavirus vaccines



Do you think the government should require everyone to get a COVID vaccine if one becomes available?

The challenges posed by COVID-19 on college campuses are significant. In the case of an outbreak, nearly half (48%) feel the campus should be shutdown and students sent home.

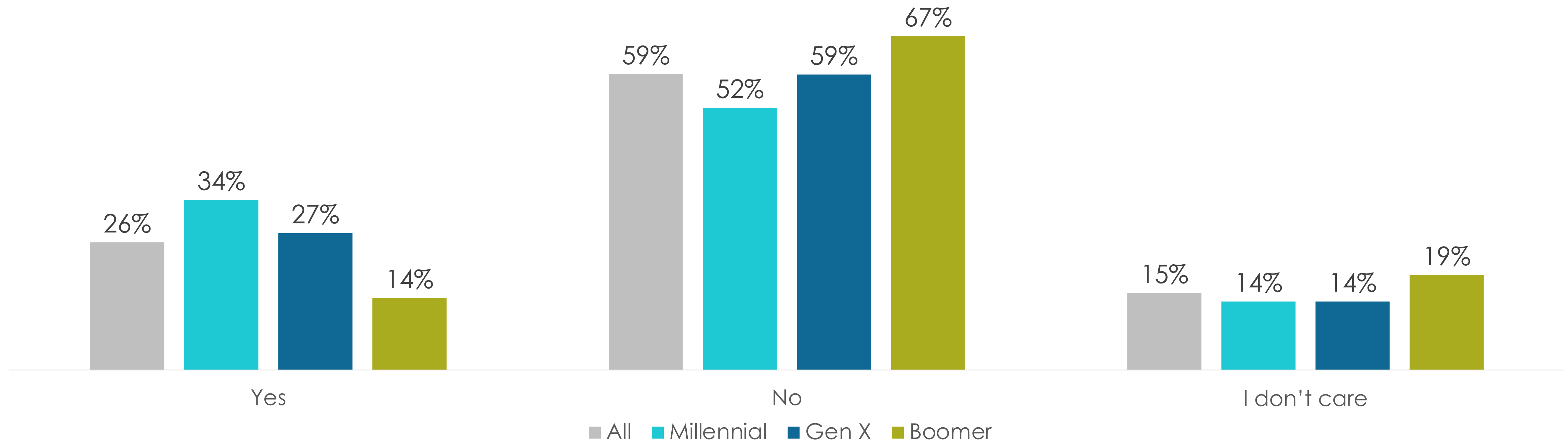
Steps colleges should take when experiencing significant outbreaks



■ All ■ Millennial ■ Gen X ■ Boomer
Many college campuses are experiencing COVID outbreaks because students are not taking the proper precautions. What should a college do when they have a significant outbreak?

59% of respondents don't believe college football should be played this season.

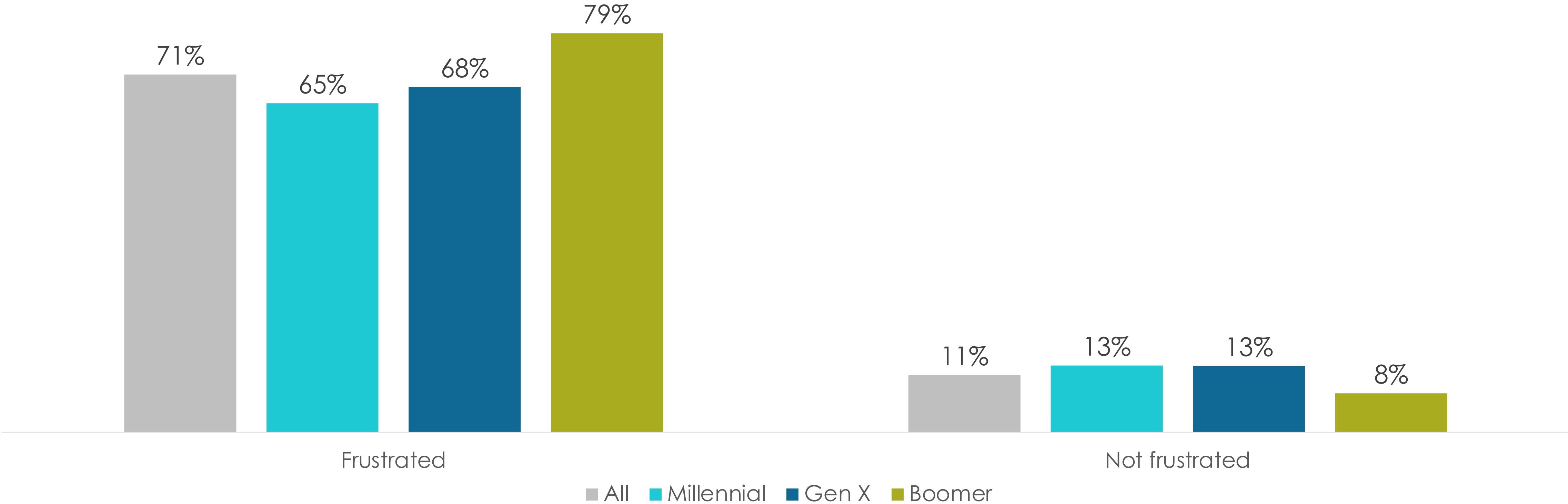
Should college football be played this season



As a result of COVID-19, some college football conferences have cancelled their seasons while other conferences intend to play. Should college football be played this season?

The inability of the House and Senate to reach agreement on a new stimulus package is weighing on people. 71% are frustrated or very frustrated by the situation.

Level of frustration with how politicians aren't able to agree on next stimulus package



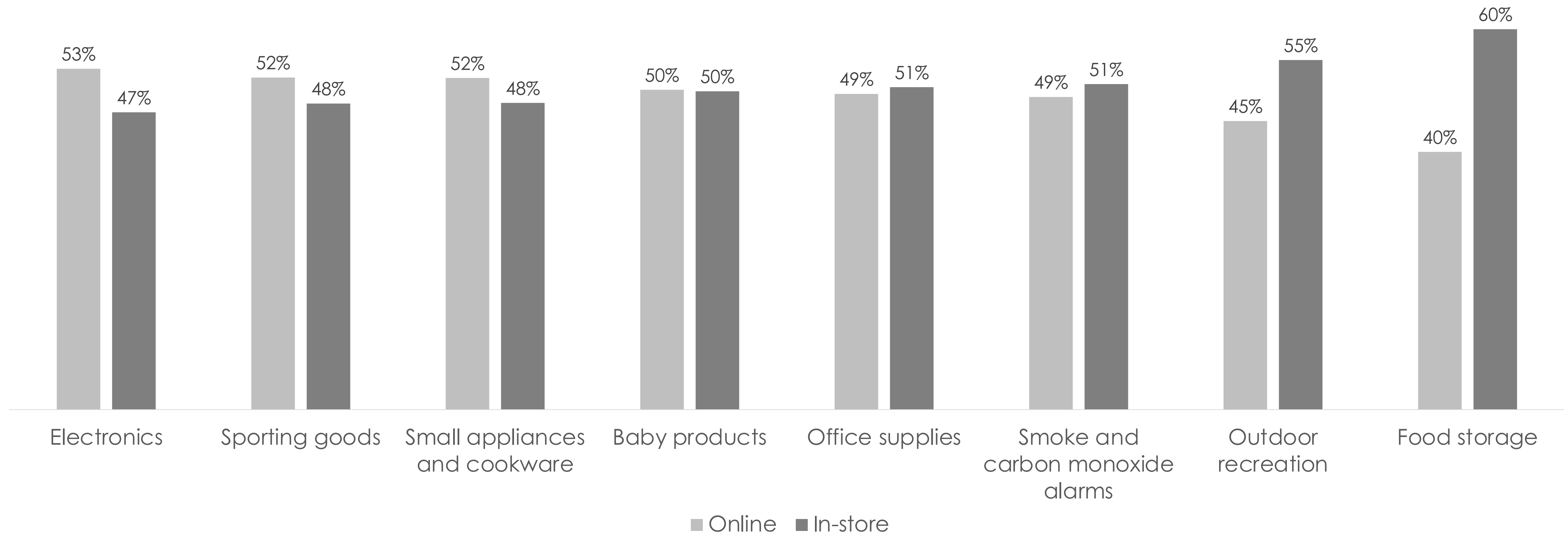
How frustrated are you that the politicians have been unable to reach an agreement on the next stimulus package?

Shopping Behaviors



Across 8 categories of commonly purchased products, respondents were relatively evenly split on whether their shopping would begin online or in-store.

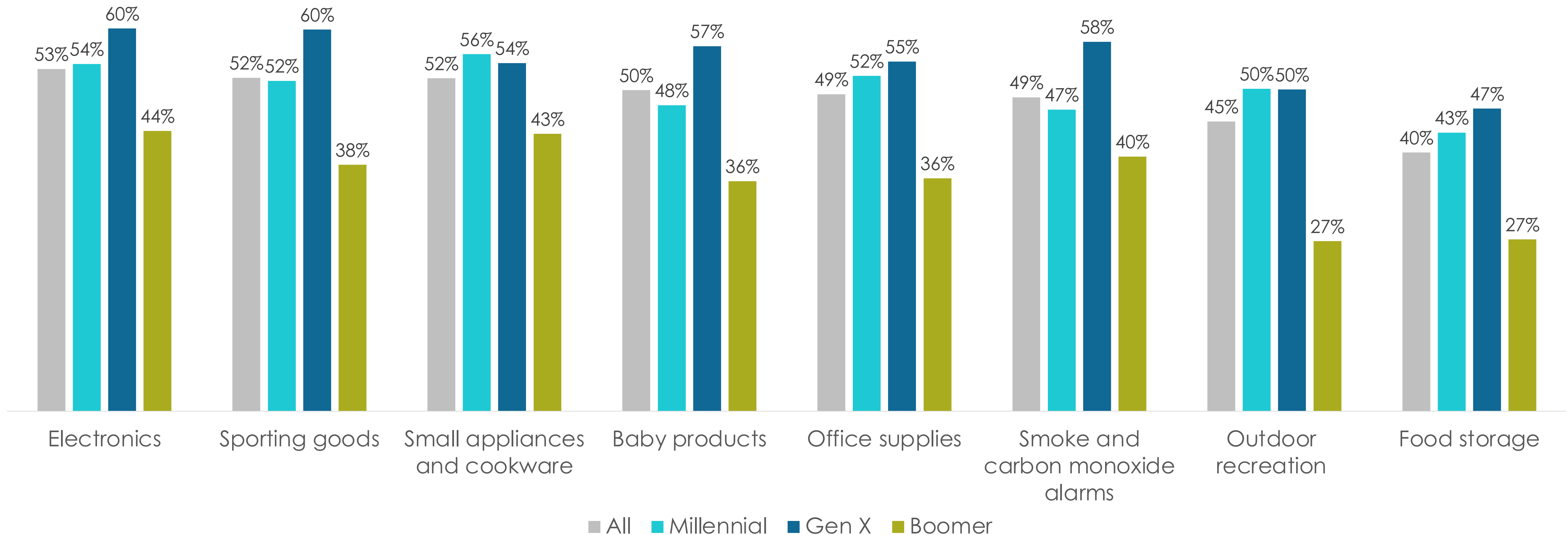
Likely shopping start point



Where would you be most likely to start shopping for products in the following categories? If you don't make purchases in a category, please select Not Applicable.

Boomers are least likely to begin their shopping online, with little more than one-quarter (27%) doing so for food storage or outdoor recreation products. GenXers are most likely to start shopping online in nearly all categories.

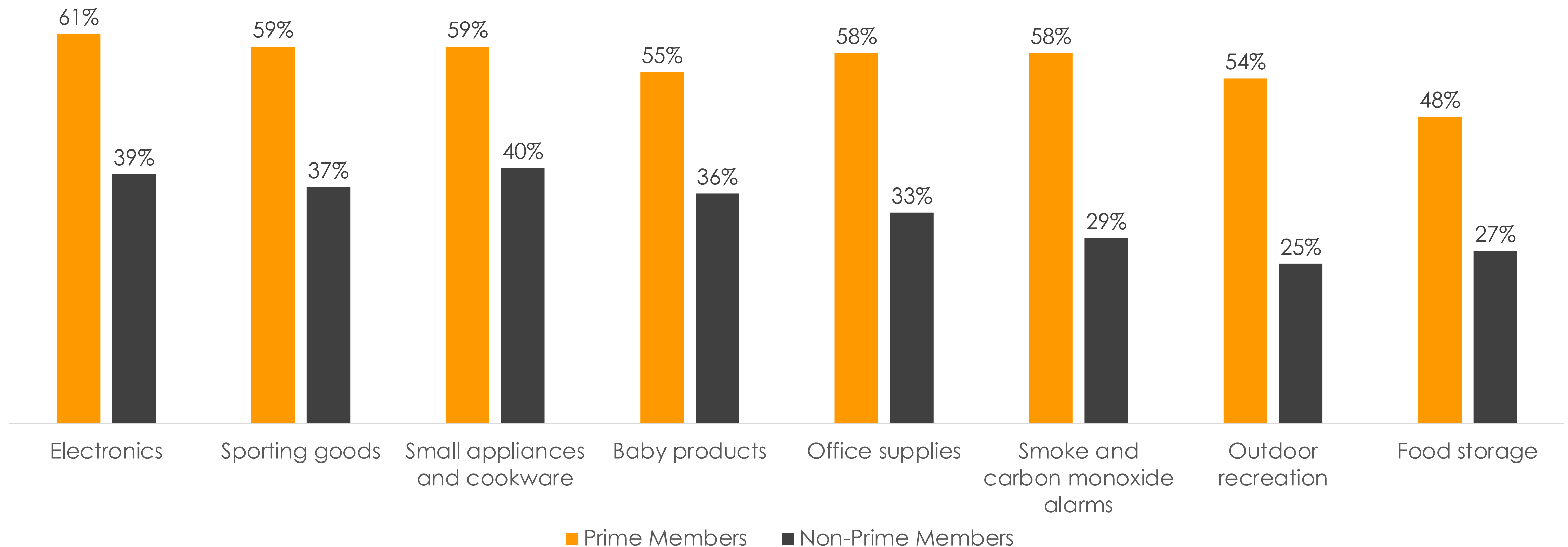
Categories likely to start shopping online



Where would you be most likely to start shopping for products in the following categories? If you don't make purchases in a category, please select Not Applicable.

Amazon Prime members are most likely to initiate their shopping online; however, they do not do so exclusively. In every category, 39% or more of Prime members will start in-store.

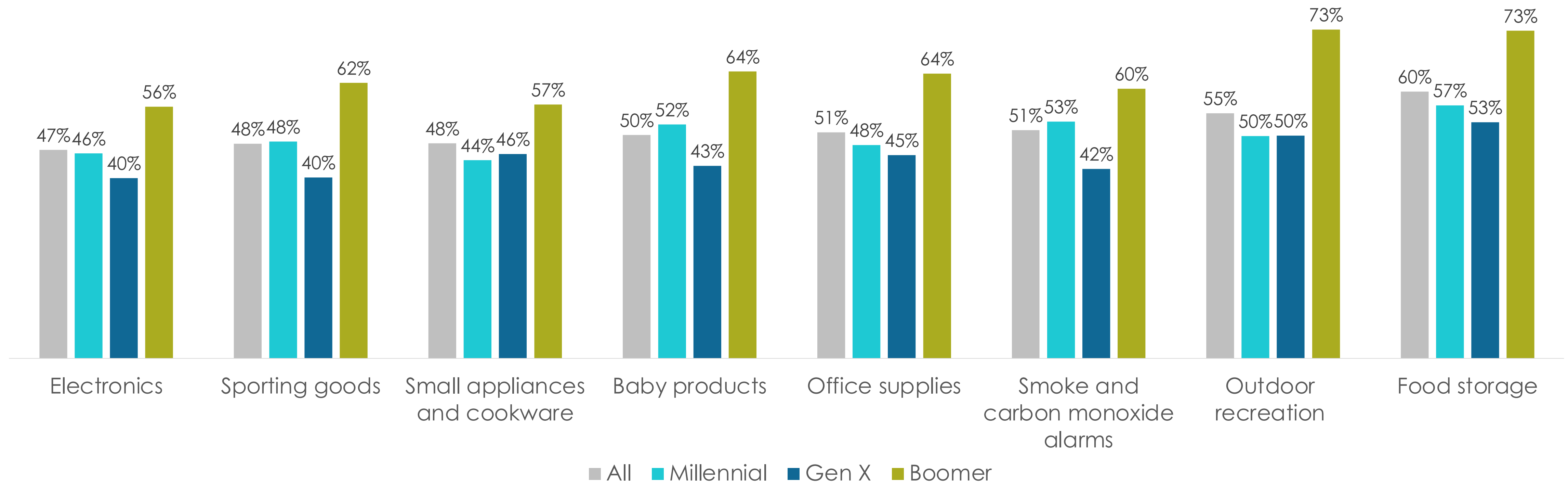
Categories likely to start shopping online



Where would you be most likely to start shopping for products in the following categories? If you don't make purchases in a category, please select Not Applicable.

Boomers are far and away the ones most likely to start their product searches in-store. At the low end, more than half (56%) will start in-store when looking for electronics while nearly three-quarters (73%) will do so when shopping for food storage.

Categories likely to start shopping in-store



Where would you be most likely to start shopping for products in the following categories? If you don't make purchases in a category, please select Not Applicable.

Three categories which represent the range of shopping starting points were selected for additional analysis:

Electronics: 53% online, 47% in-store

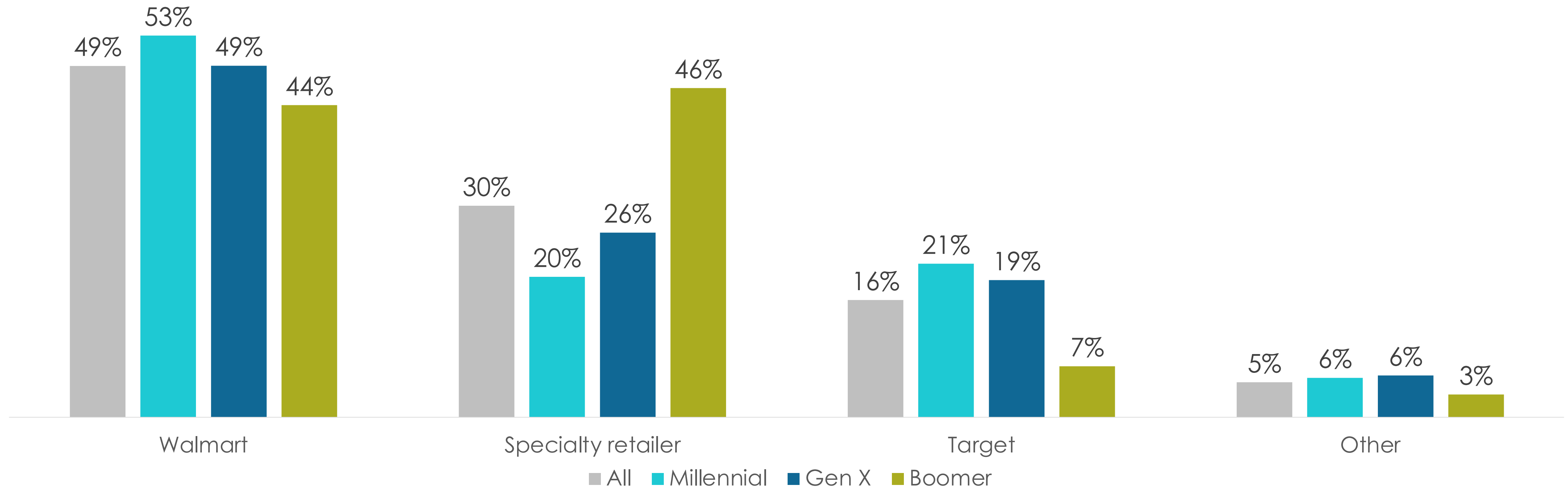
Office products: 51% online, 49% in-store

Food storage: 40% online, 60% in-store



Of those who initiate electronics shopping in-store, 49% are most likely to begin at Walmart. Boomers (46%) are significantly more likely to start in a specialty retailer.

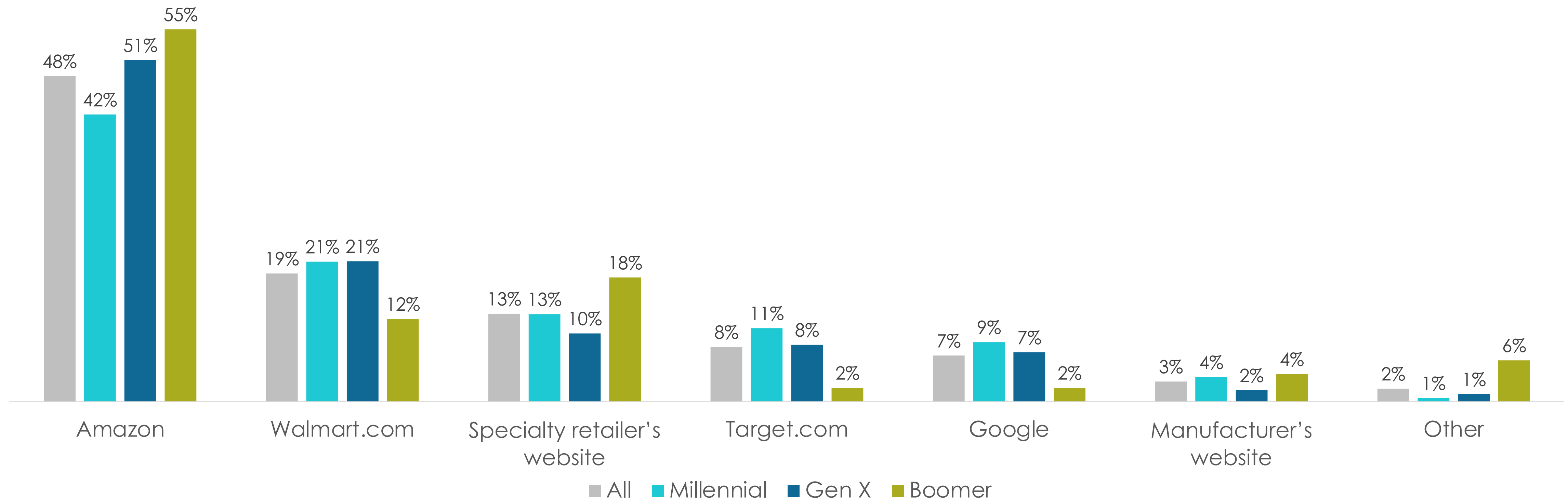
Likely to begin shopping categories in-store: electronics



Which do you most likely begin your shopping in the following categories?

Amazon enjoys the same advantage online that Walmart does in-store, with 48% of respondents selecting Amazon as their starting point for electronics. Fewer than 1 in 5 are likely to begin at Walmart.com.

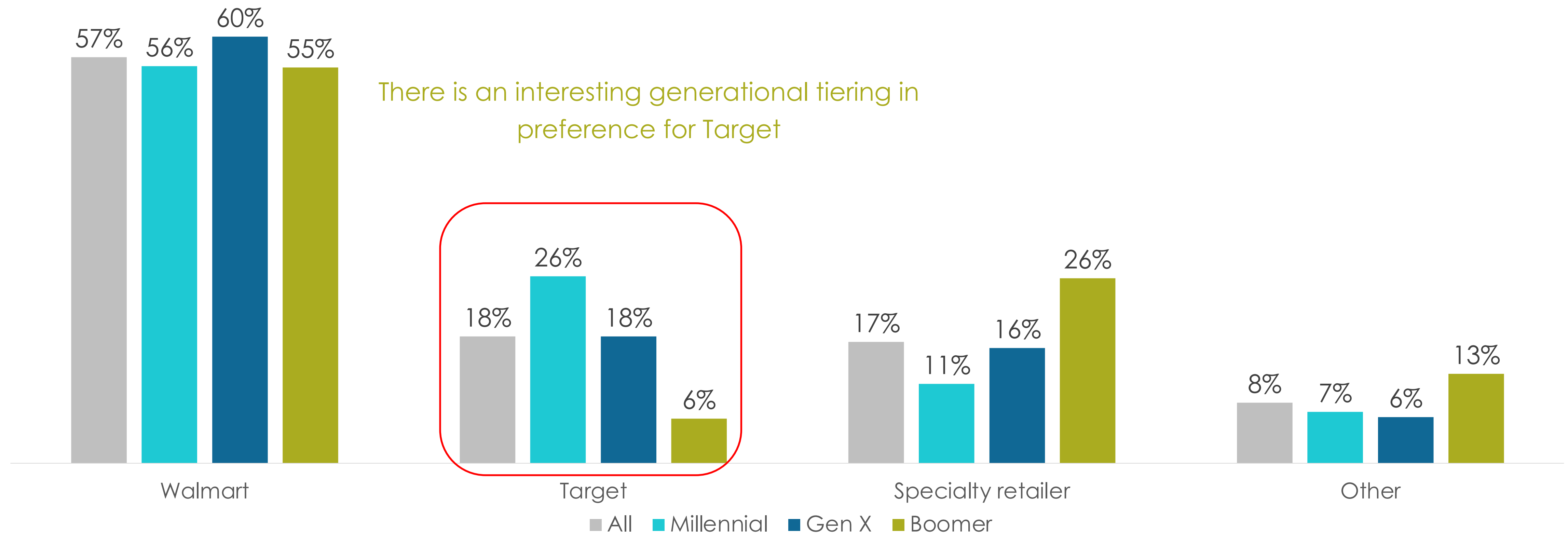
Likely to begin shopping categories online: electronics



At which of the following online locations would you most likely begin your shopping in the following categories?

In office supplies, the majority of each generation will start their in-store shopping at Walmart. An interesting contrast exists between the Boomers (26% specialty retailer) and the Millennials (26% Target) who don't select Walmart.

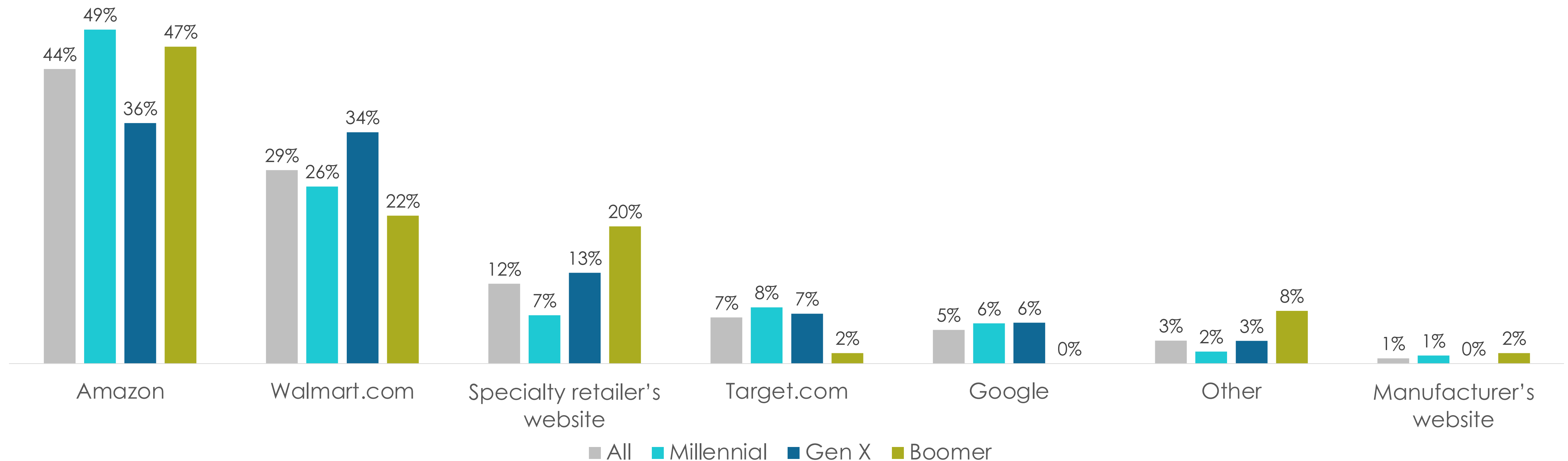
Likely to begin shopping categories in-store: office supplies



Which do you most likely begin your shopping in the following categories?

While Amazon is the most popular online starting point for office supplies (44%), more than one-quarter (29%) will start at Walmart.com.

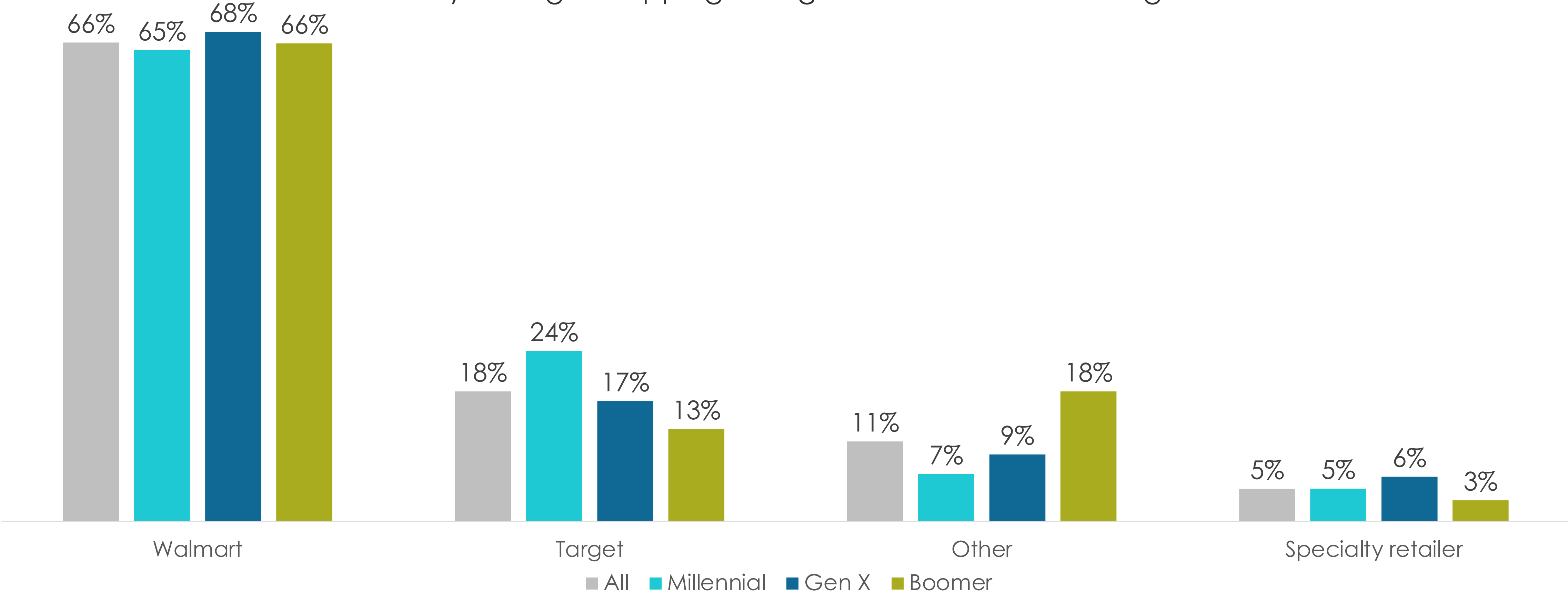
Likely to begin shopping categories online: office supplies



At which of the following online locations would you most likely begin your shopping in the following categories?

Among the 60% of respondents who will initiate their food storage shopping in-store, nearly two-thirds (66%) will start at Walmart. The generational tiering in preference for Target remains evident here.

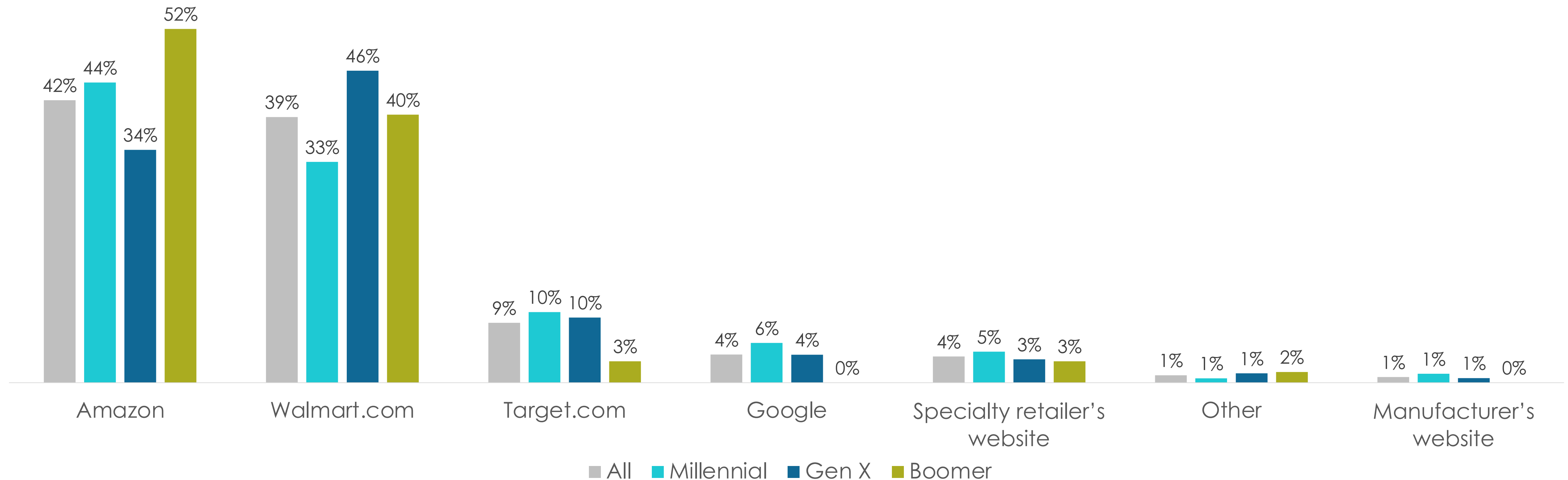
Likely to begin shopping categories in-store: food storage



Which do you most likely begin your shopping in the following categories?

For those who will begin food storage shopping online, the disparity between Amazon (42%) and Walmart.com (39%) is significantly smaller than in the other categories explored.

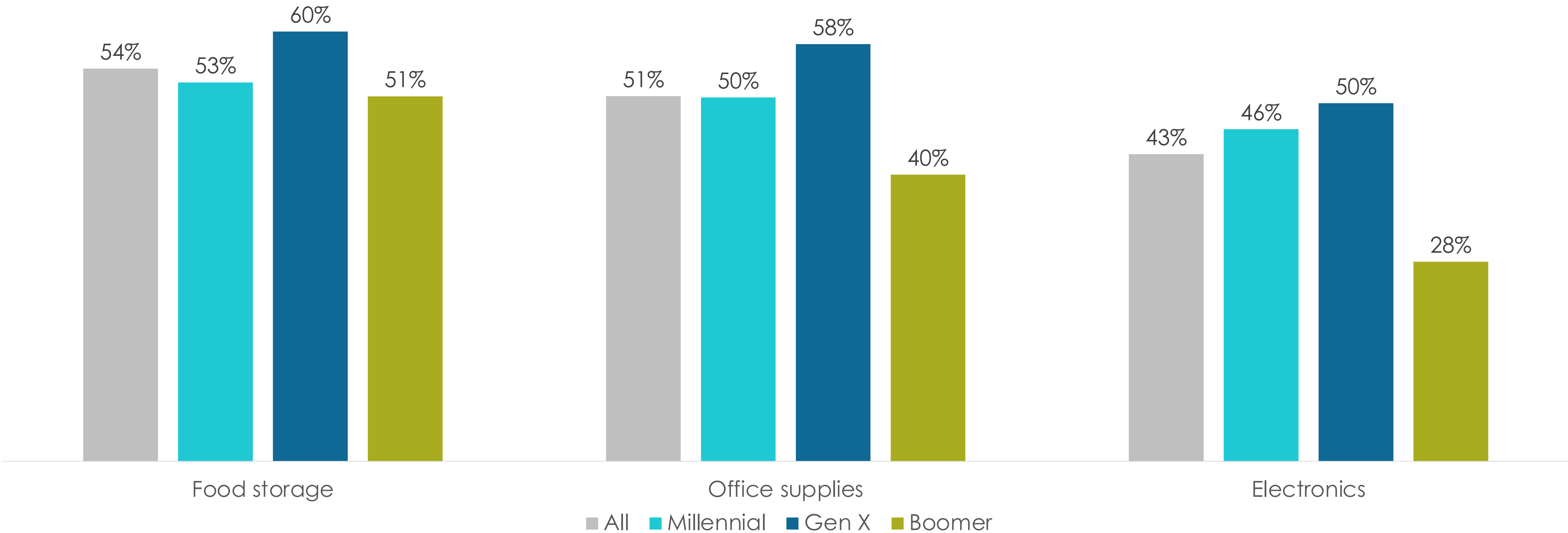
Likely to begin shopping categories online: food storage



At which of the following online locations would you most likely begin your shopping in the following categories?

Approximately half of the respondents said they were likely or very likely to purchase each of the categories from Walmart or Walmart.com, ranging from a high of 54% for food storage to a low of 43% for electronics.

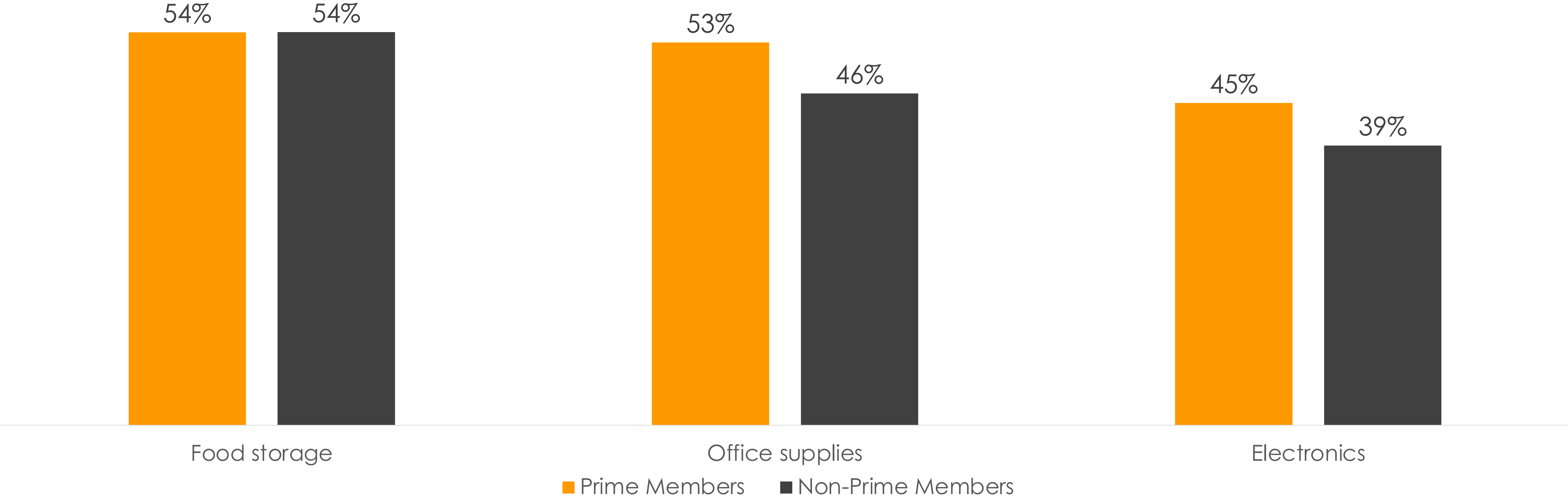
Likely to Purchase at Walmart/Walmart.com



How likely would you be to purchase the following items in the following product categories from Walmart (in store) or Walmart.com?

Surprisingly, Amazon Prime members are as likely or more likely to buy from Walmart or Walmart.com than non-Prime members.

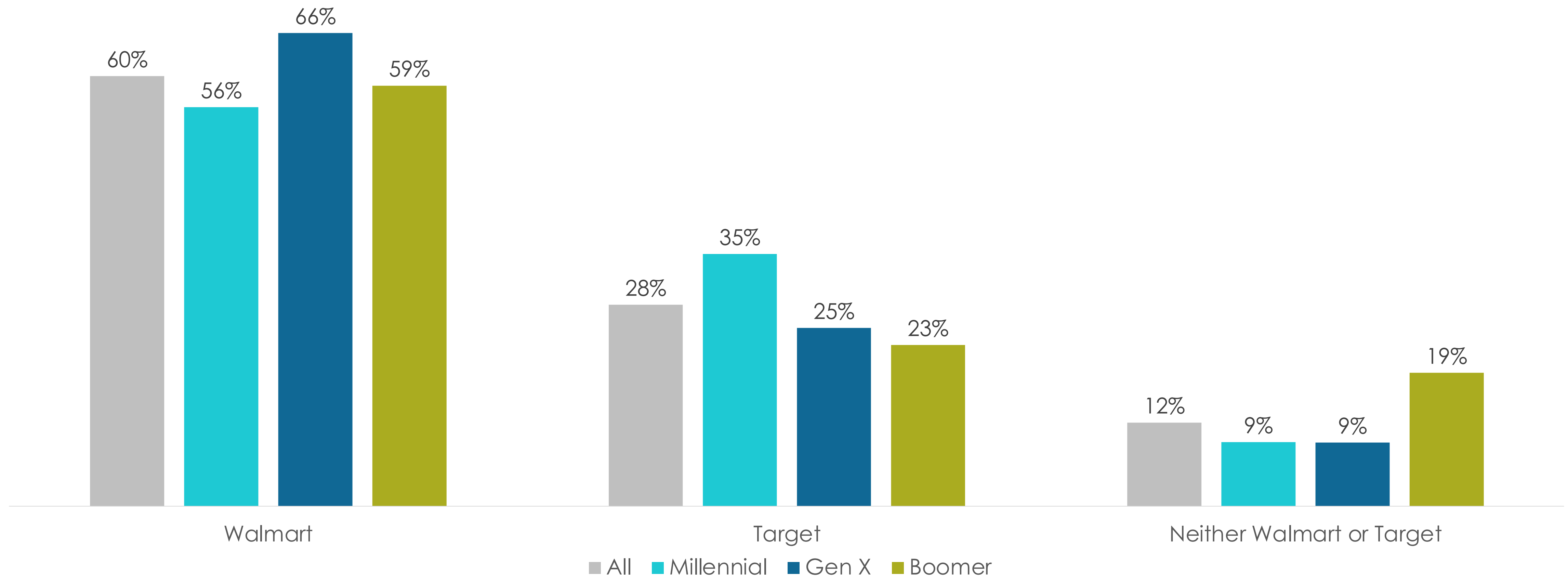
Likely to Purchase at Walmart/Walmart.com



How likely would you be to purchase the following items in the following product categories from Walmart (in store) or Walmart.com?

60% of respondents indicate Walmart is their brick and mortar choice for non-grocery items. However, Target is preferred by more than one-third of Millennials and almost one in 5 Boomers prefers somewhere other than Walmart or Target.

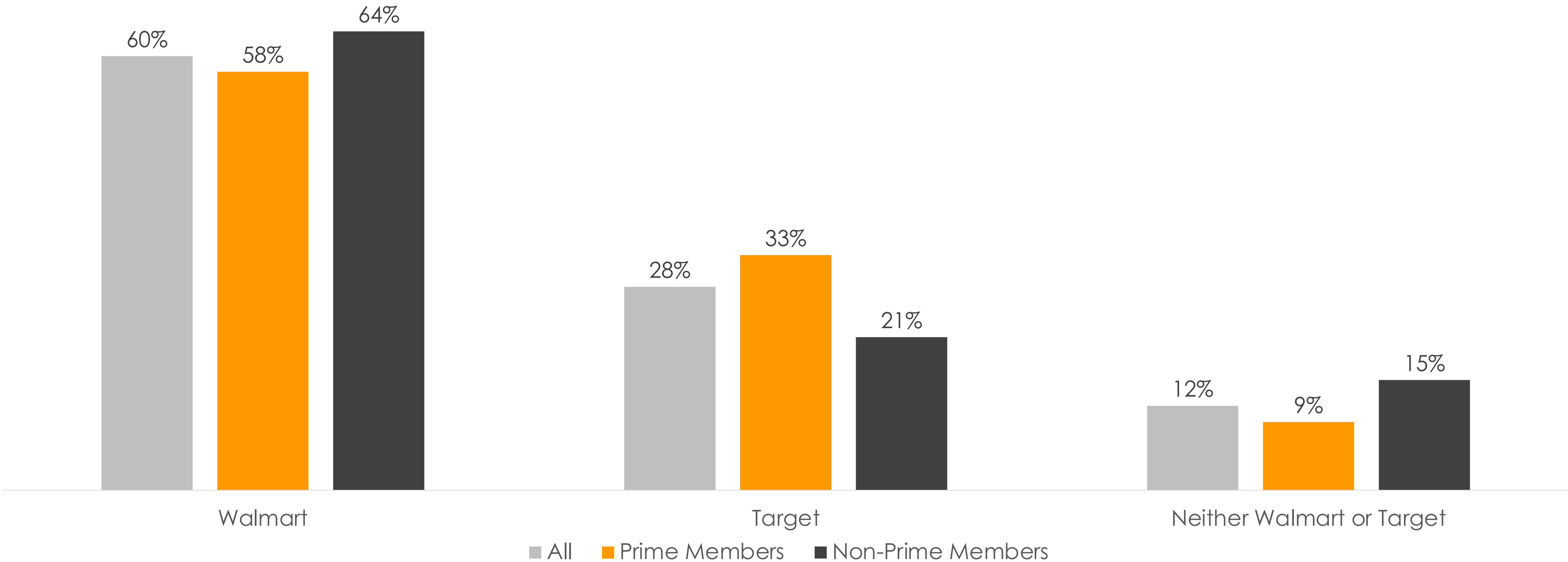
Non-food retailer choice



If you could only choose one (non-food) retailer where you could shop in store, which would it be?

Target enjoys a substantial advantage among Amazon Prime members (33%) over non-Prime members (21%).

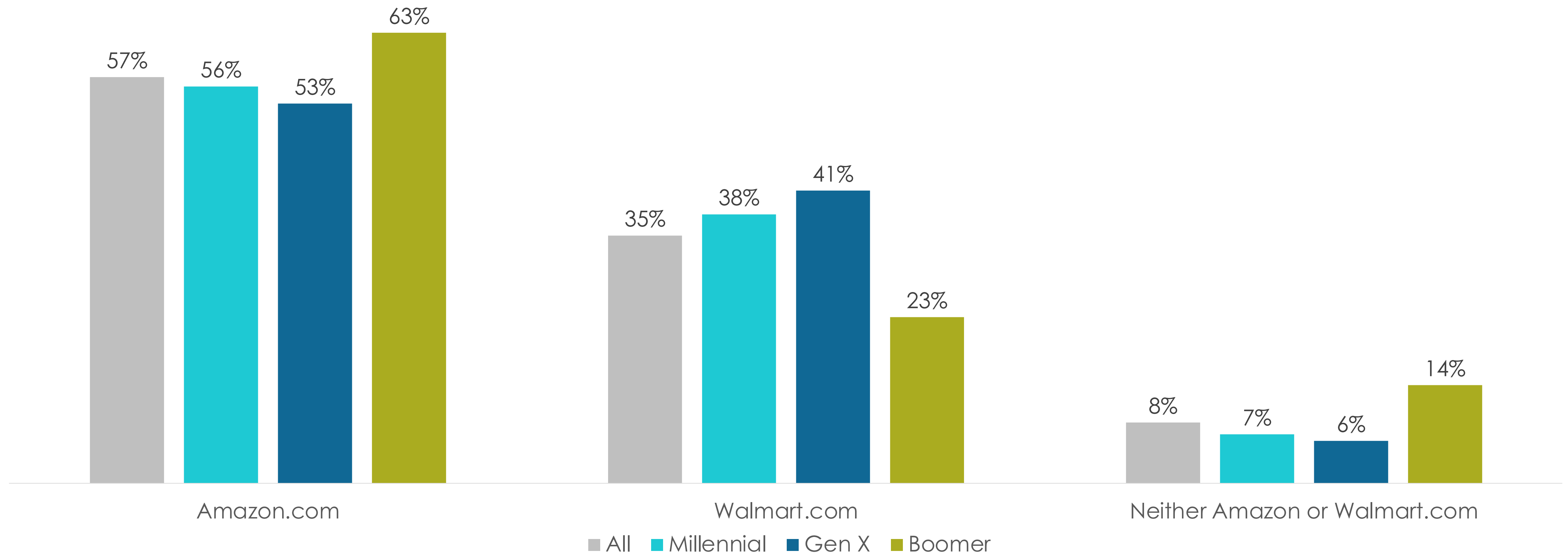
Non-food retailer choice



If you could only choose one (non-food) retailer where you could shop in store, which would it be?

Given the choice of only one online shopping destination, a majority of respondents selected Amazon (57%). But, Walmart.com is the choice of nearly 40% of Millennials and GenXers.

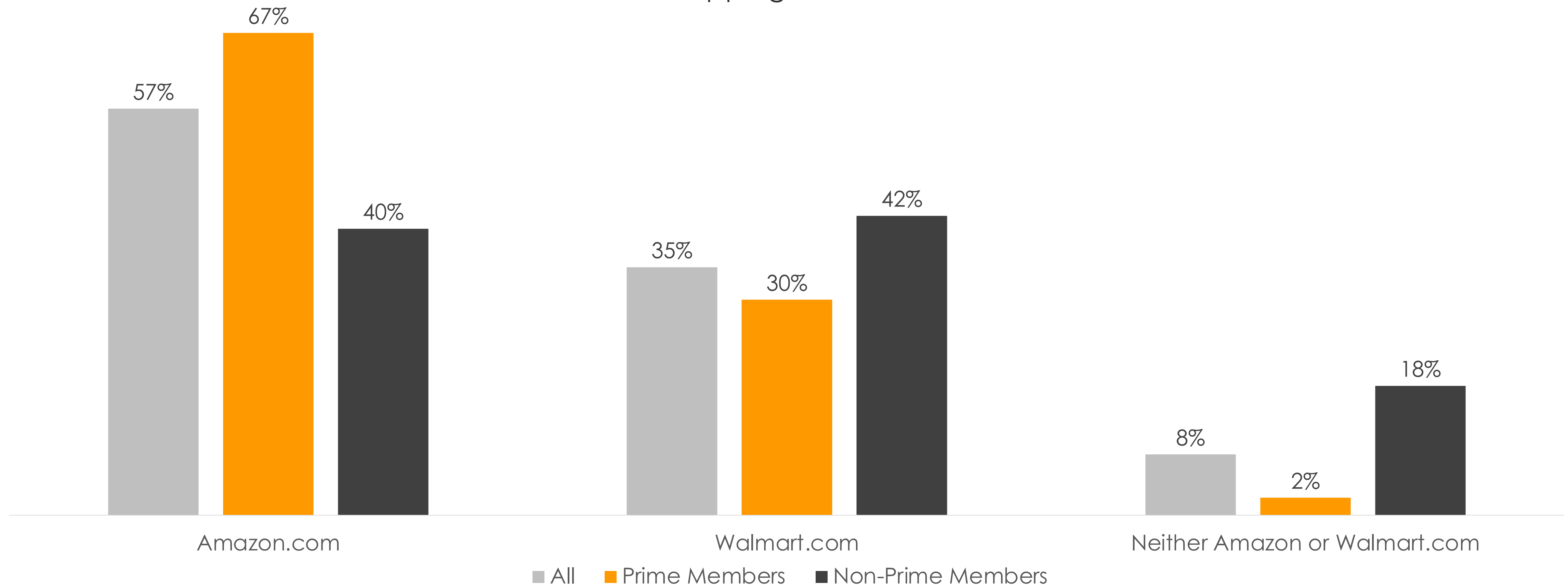
Online shopping location choice



If you could only choose one location to shop online which of the following would it be?

Amazon is the online shopping destination of choice for two-thirds of Prime members. Non-Prime members are split almost equally between Amazon (40%) and Walmart.com (42%).

Online shopping location choice



If you could only choose one location to shop online which of the following would it be?

Summary

COVID-19 continues to raise new issues and questions.

- Only 50% of respondents are sure they'd get a COVID vaccine if one becomes available. 27% are unsure what they would do and 23% say they will not get a vaccine.
- Among those unsure or unwilling to get a vaccine, the biggest concern (52%) is the safety of a vaccine developed so quickly. Only 13% say they don't believe in vaccines.
- Of the 50% who say they will get a vaccine, 72% believe the government should make it mandatory.
- Nearly half (48%) of respondents feel a significant COVID-19 outbreak on a college campus should result in shutting the campus down and sending students home.
- 59% of respondents don't believe college football should be played this season.
- 71% are frustrated or very frustrated by the inability of Congress to agree on a stimulus package.

Delving deeper into consumers' evolving shopping behaviors continues to deliver interesting insights.

- Across 8 categories of commonly purchased products, respondents were relatively evenly split on whether their shopping would begin online or in-store.

Summary - Continued

- Boomers are least likely to begin their shopping online, with little more than one-quarter (27%) doing so for food storage or outdoor recreation products. GenXers are most likely to start shopping online in nearly all categories.
- Amazon Prime members are much more likely to start shopping online than are non-Prime members. However, they don't do it exclusively.
 - Across the eight categories, 39% to 52% of Prime members will initiate their shopping in-store.
- Boomers start their shopping in-store from 56% to 73% of the time, depending on the category.
- Of those who initiate electronics shopping in-store, 49% are most likely to begin at Walmart. Boomers (46%) are significantly more likely to start in a specialty retailer.
 - Amazon enjoys the same advantage online that Walmart does in-store, with 48% of respondents selecting Amazon as their starting point for electronics.
- In office supplies, the majority of each generation will start their in-store shopping at Walmart. An interesting contrast exists between the Boomers (26% specialty retailer) and the Millennials (26% Target) who don't select Walmart.
 - While Amazon is the most popular online starting point for office supplies (44%), more than one-quarter (29%) will start at Walmart.com.

Summary - Continued

- Among the 60% of respondents who initiate their food storage shopping in-store, nearly two-thirds (66%) will start at Walmart.
- The generational preference for Target, which increases from Boomers to Millennials, is evident here as it was in office products.
- For those who will begin food storage shopping online, the disparity between Amazon (42%) and Walmart.com (39%) is significantly smaller than in the other categories explored.
- Approximately half of respondents said they were likely or very likely to purchase each of the categories from Walmart or Walmart.com, ranging from a high of 54% for food storage to a low of 43% for electronics.
- 60% of respondents indicate Walmart is their brick and mortar choice for non-grocery items. However, Target is preferred by more than one-third of Millennials, and almost 1 in 5 Boomers prefer somewhere other than Walmart or Target.
 - Target enjoys a substantial preference advantage among Amazon Prime members (33%) over non-Prime members (21%).
- Given the choice of only one online shopping destination, a majority of respondents selected Amazon (57%). But, Walmart.com is the choice of nearly 40% of Millennials and GenXers.
- Amazon is the preferred online shopping destination for two-thirds of Prime members. Non-Prime members are split almost equally between Amazon (40%) and Walmart.com (42%).