



# COVID-19 U.S. CONSUMER IMPACT TRACKING STUDY – WEEK 30

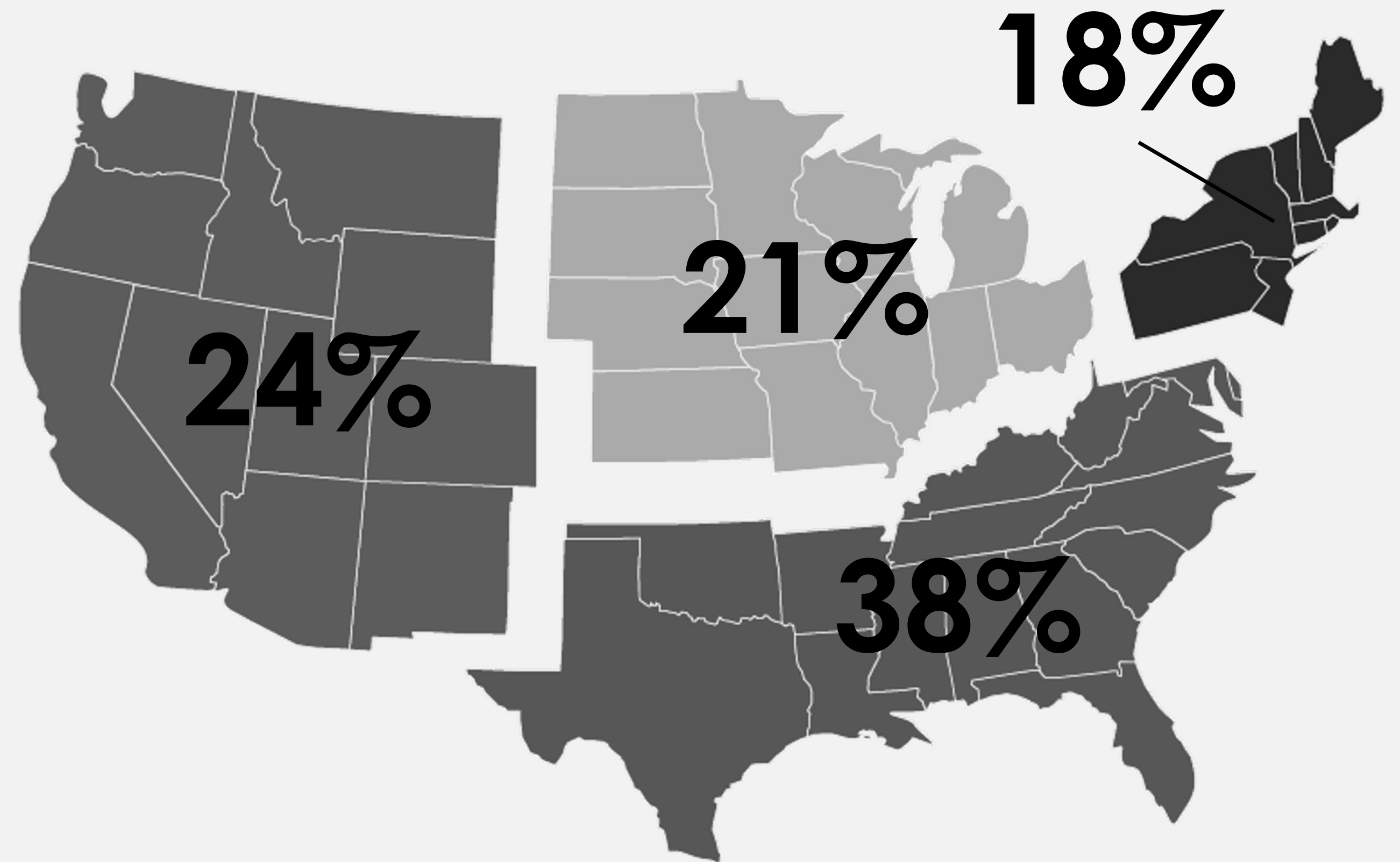
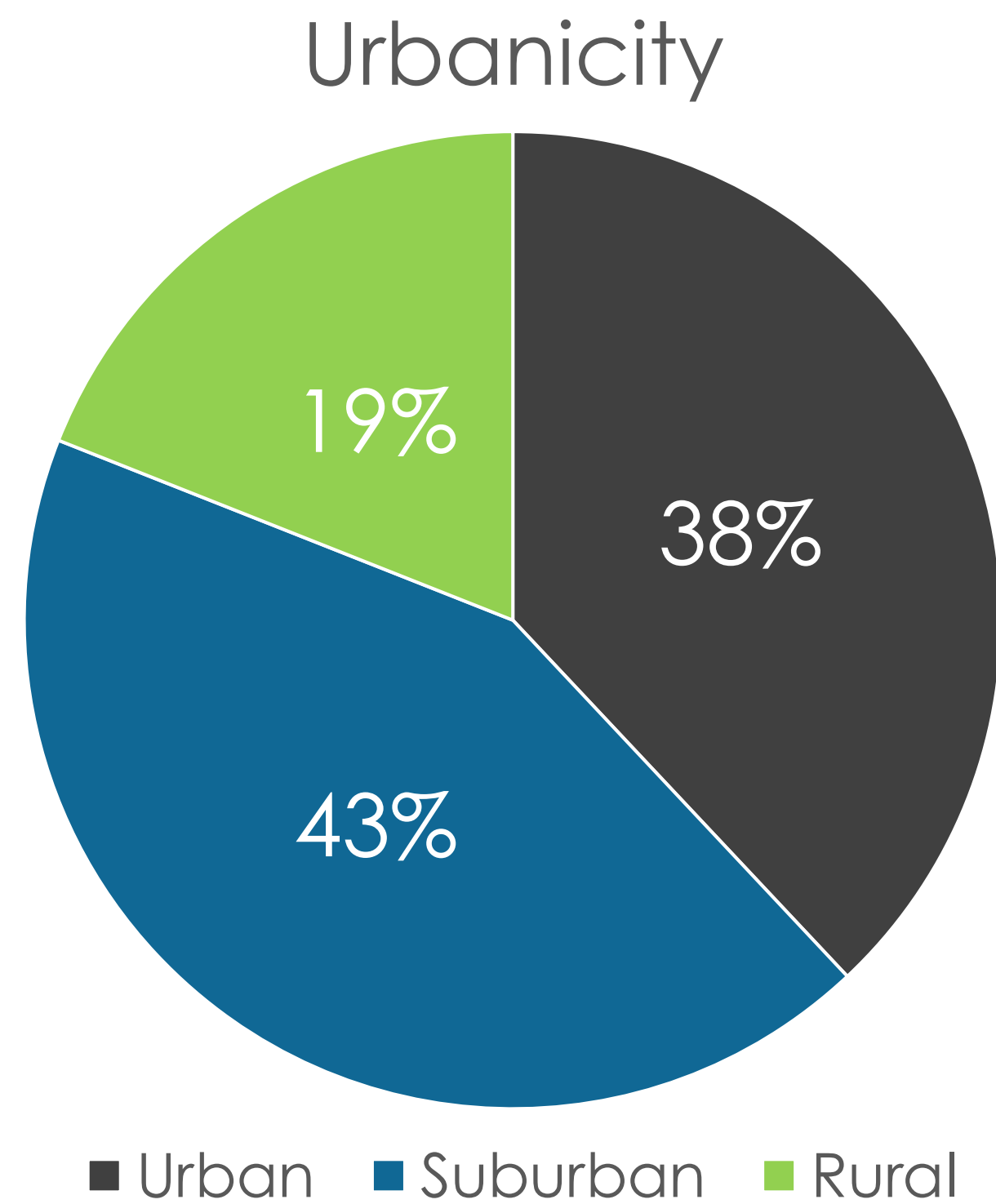
PRESENTED SEPTEMBER 28, 2020

# Methodology

- N = 1,133
- MOE =  $\pm 2.91\%$
- Panel: General Population
- Collected: 09/24/20, 09/25/20

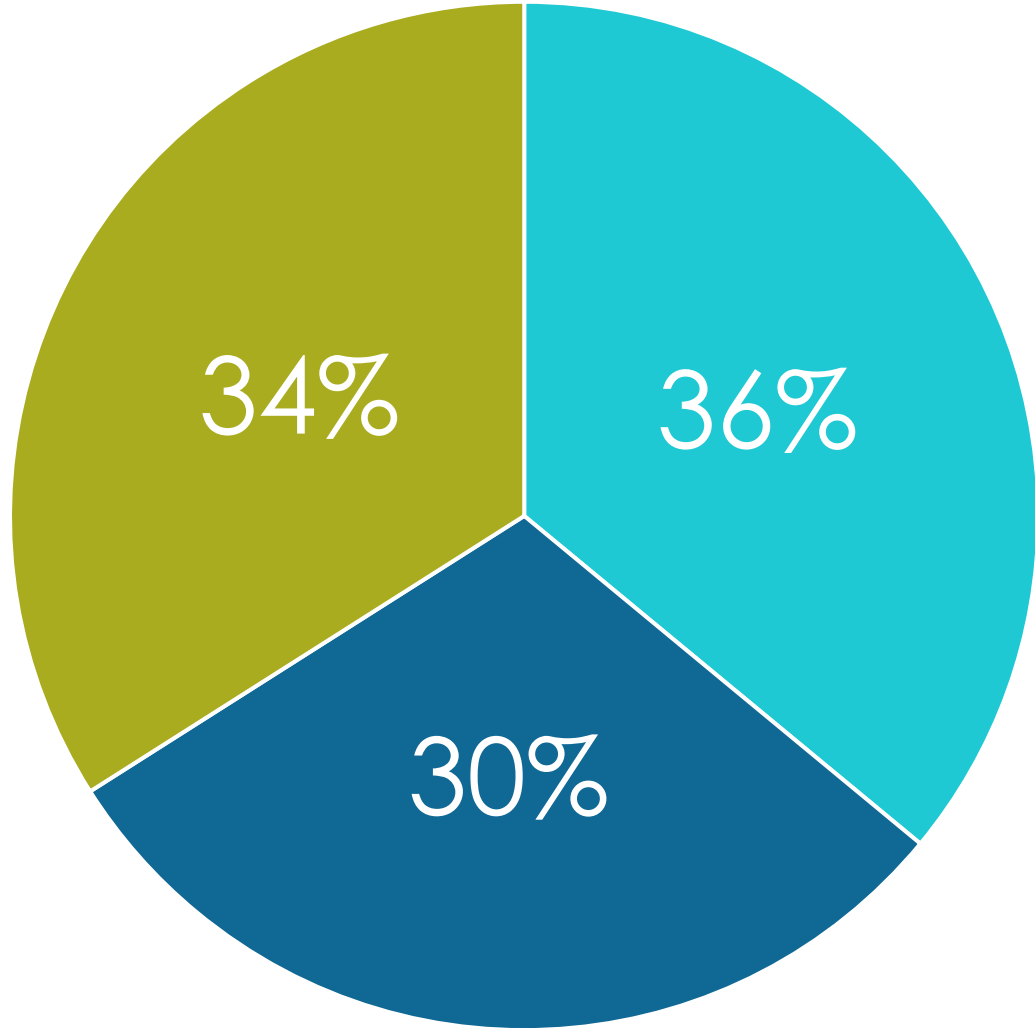


# Census Balanced Panel is Representative of America



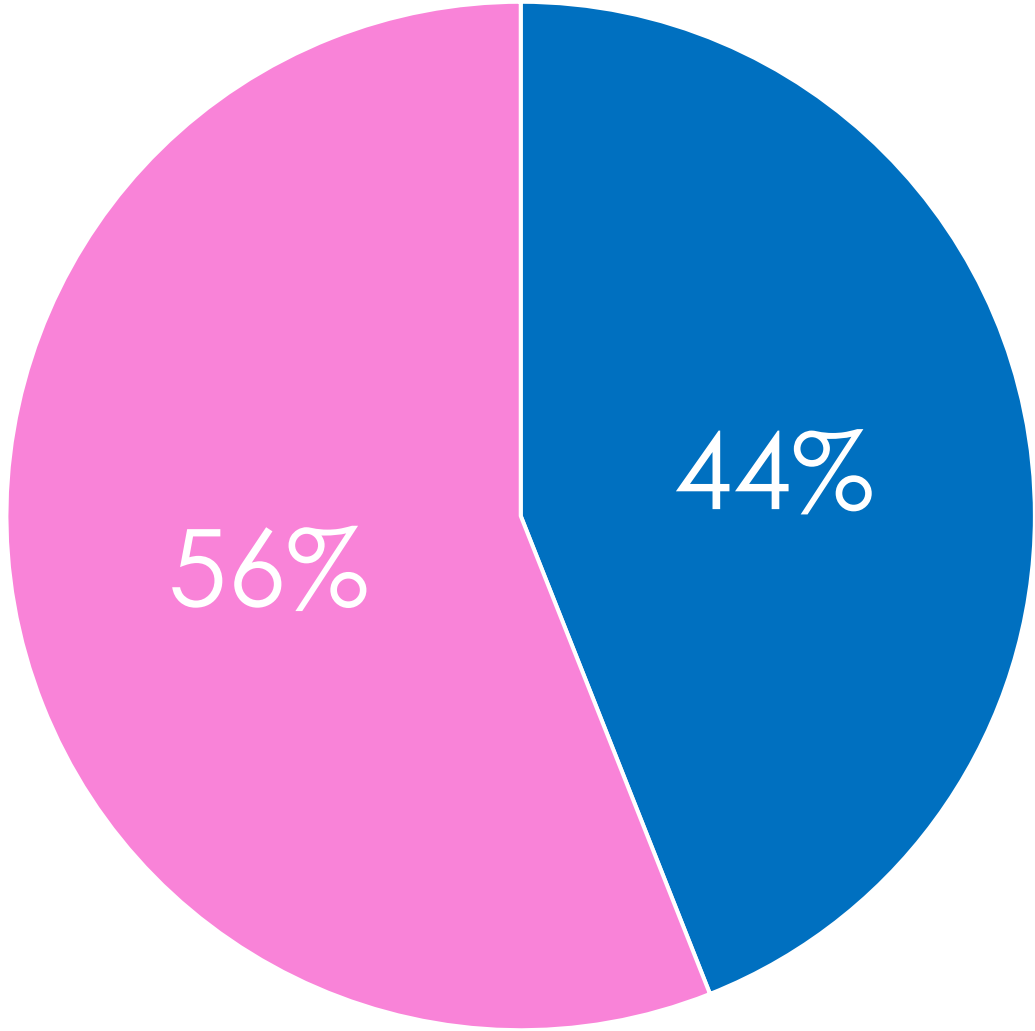


Generation



■ Millennial ■ Gen X ■ Boomer

Gender



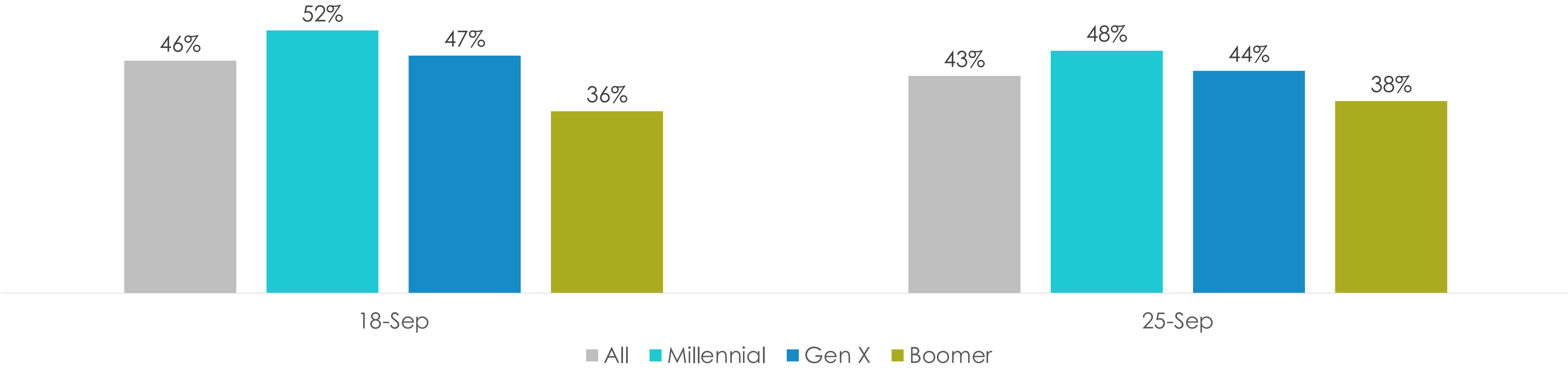
■ Male ■ Female



# COVID-19 Hot Topics

General worry among consumers is similar week-over-week, despite an ever-closer election and delays in COVID-19 vaccine trials.

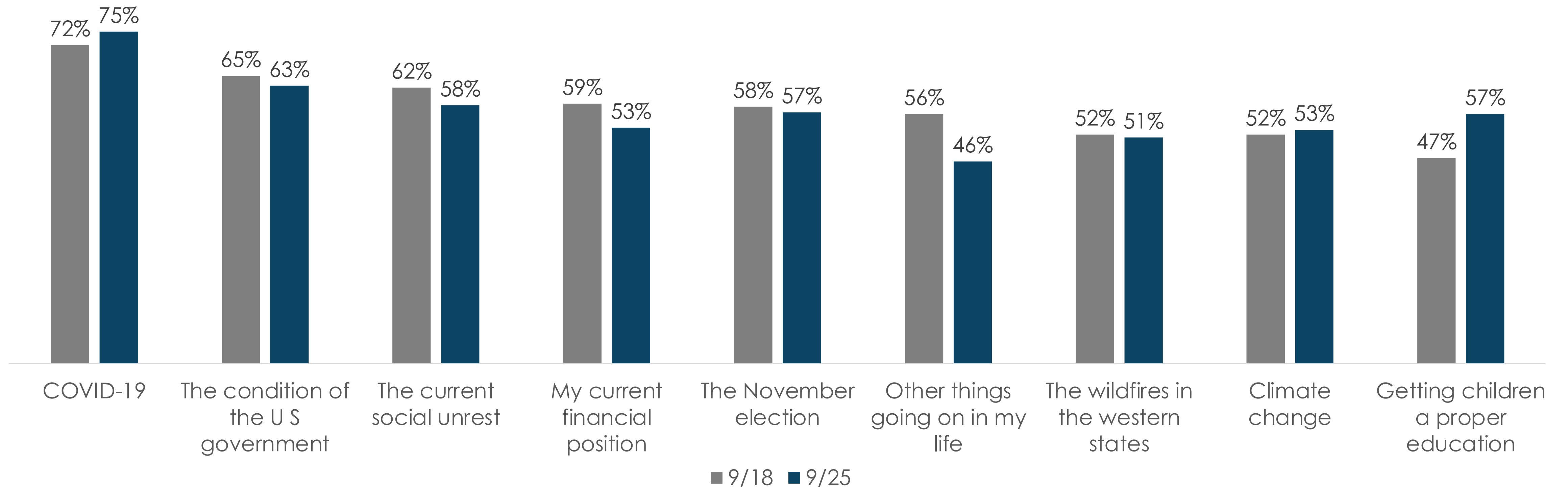
% who are generally worried



In general, how worried are you now?

Perhaps due to ongoing challenges with nationwide efforts to get kids back to school, getting children a proper education is growing as a source of worry.

### Influence on worry level



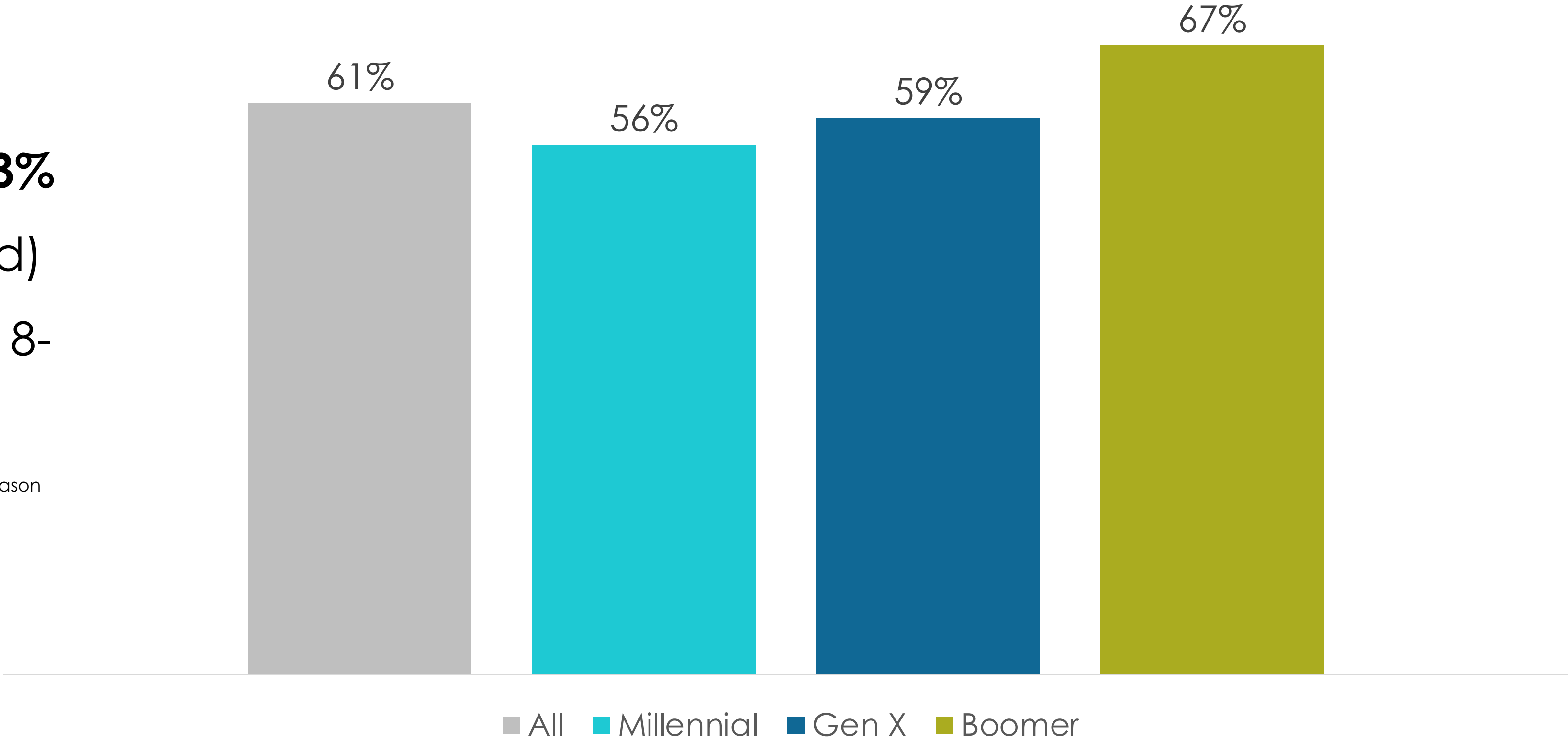
How much are the following influencing your worry level?

Self-reported flu shot adoption rates are trending significantly above last year as medical professionals stress its importance this year with regard to COVID-19.

Those who have or plan to get a flu shot this year

According to the CDC: **45.3%** of Americans (>18 years old) received flu shots in the 2018-2019 flu season.

CDC. Flu Vaccination Coverage, United States, 2018-19 Influenza Season

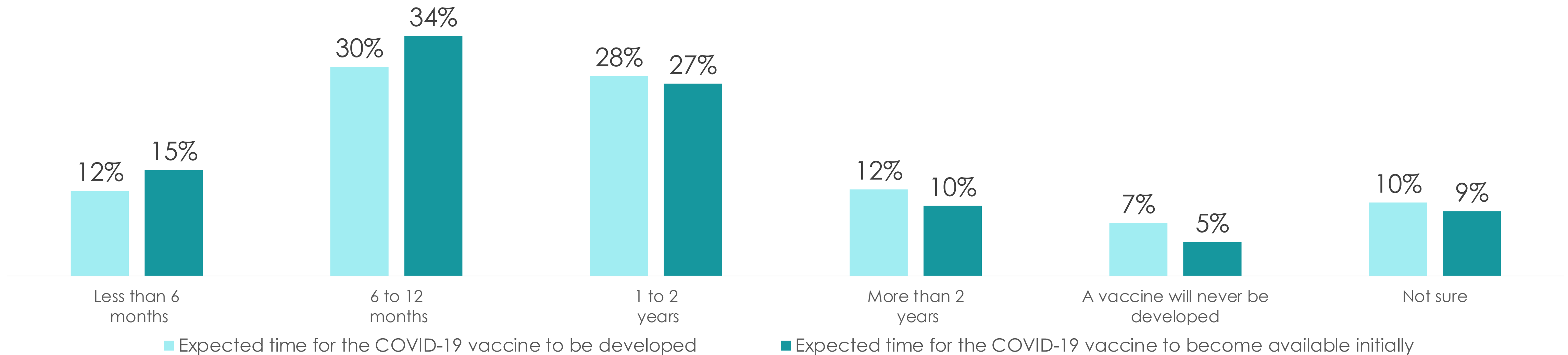


Have you received or do you plan to get a flu shot this year?



A majority of people believe a COVID-19 vaccine is at least 6 months or further away, despite talk about a vaccine before the end of the year.

Expected time for the COVID-19 vaccine to be developed



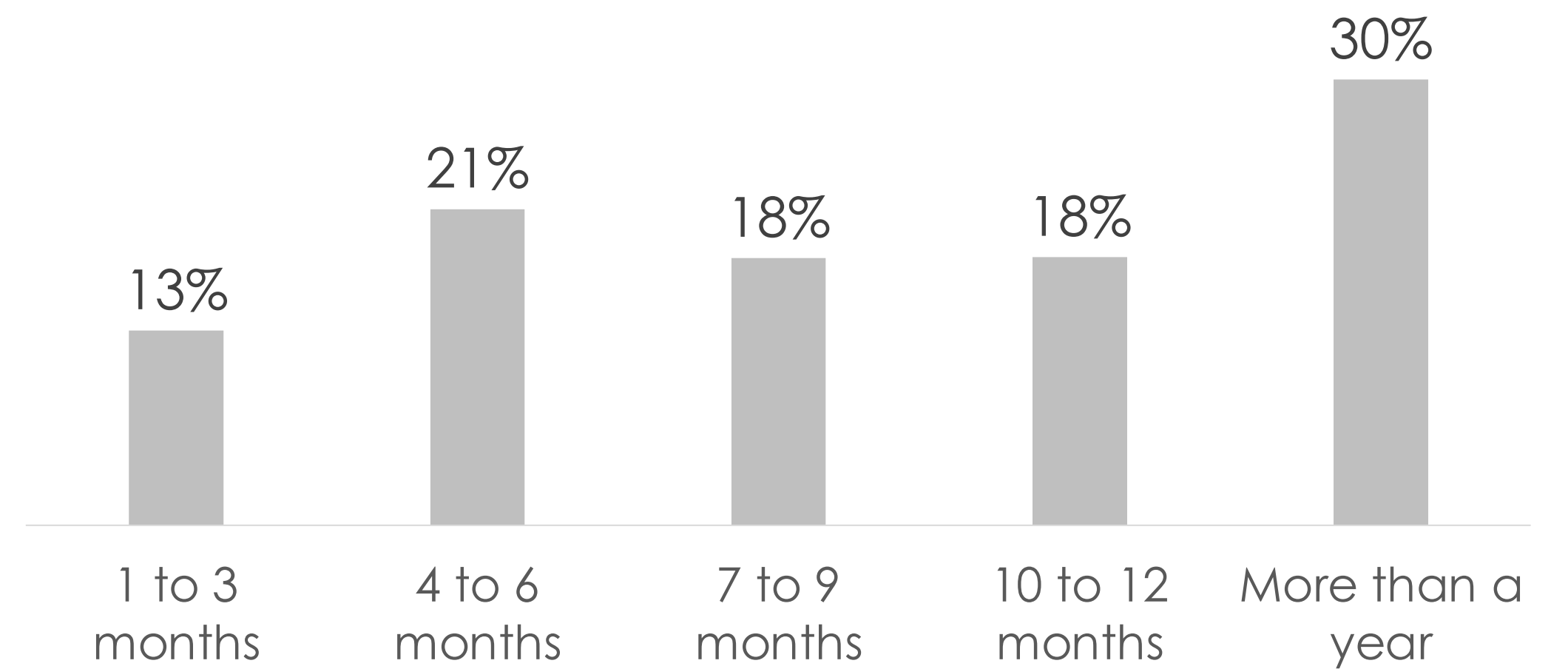
How long do you think it will take to develop an effective vaccine to protect people from Coronavirus?

How long do you think it will be before the COVID-19 vaccine is available **initially** (to the elderly, those with underlying health issues, essential workers, etc.)?



Although expectations vary, most expect a large delay between the vaccine release and widespread availability.

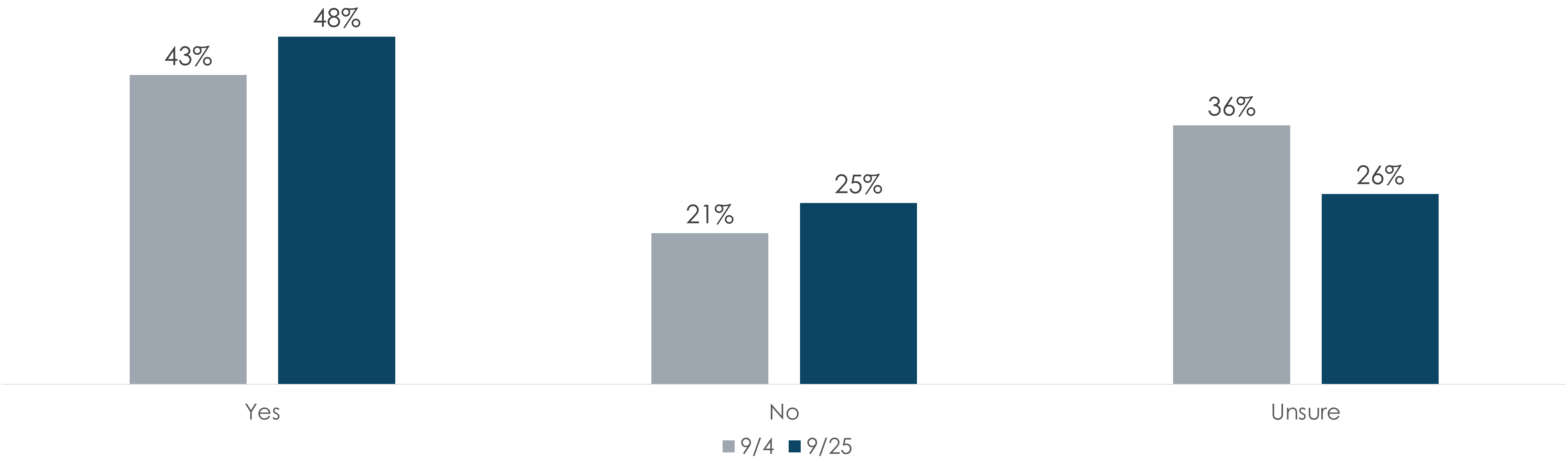
Expected time after the COVID-19 vaccine released that it will be available to everyone



How long after the initial release of the COVID-19 vaccine do you think it will be available for **everyone**?

Certainty has grown since early September, both in favor of and in opposition to receiving a COVID-19 vaccine.

Getting the COVID-19 vaccine when it becomes available



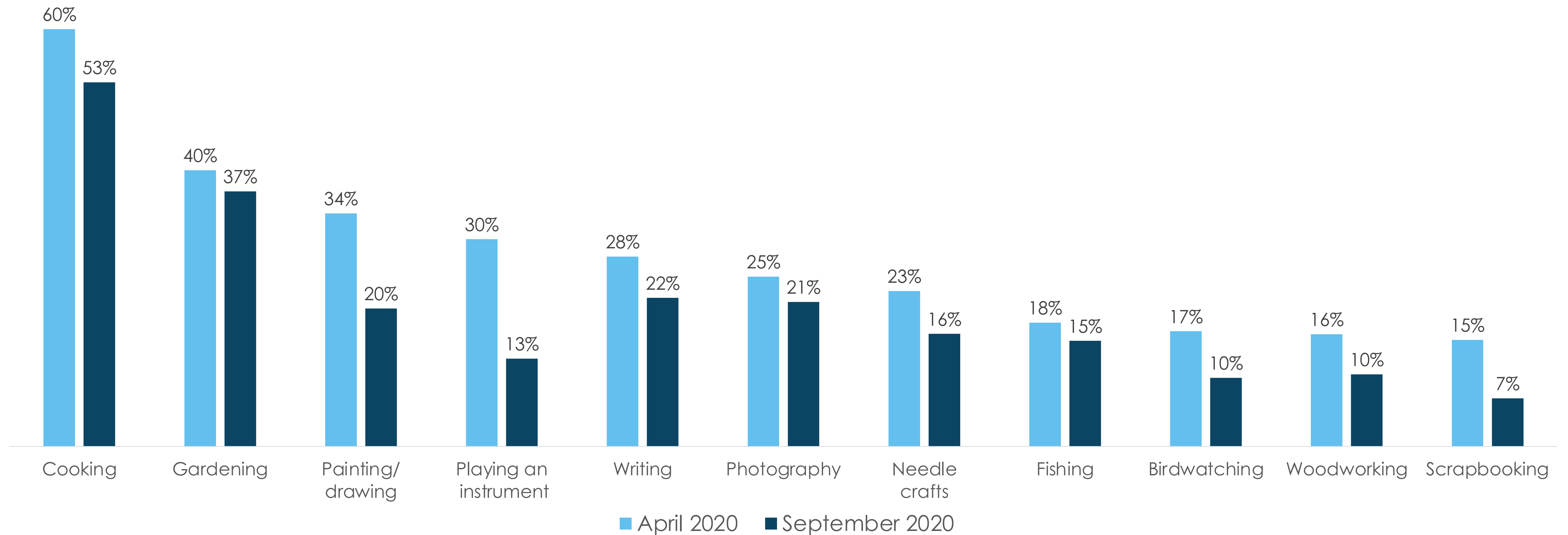
Will you get a COVID-19 vaccine if one becomes available?

# Hobbies



Engagement in many hobbies has declined somewhat since early lockdown, likely due to relaxed closures and the return of many sports.

Change in hobbies done in free time



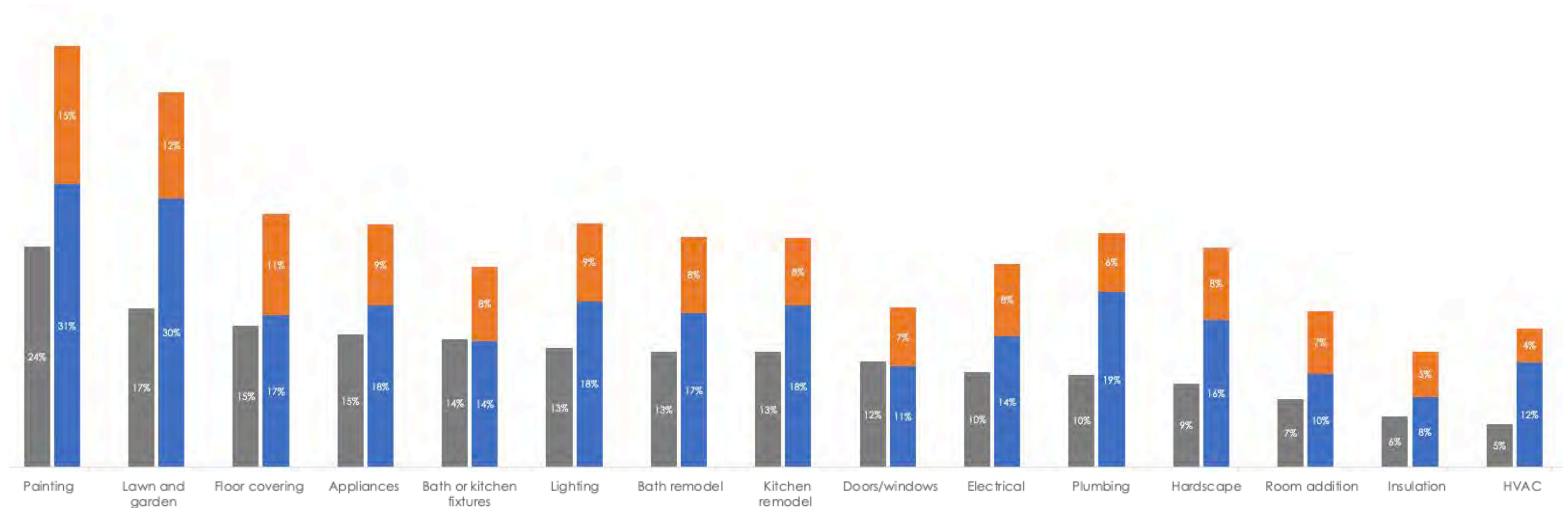
Which of the following hobbies are you spending your free time doing? Select all that apply.

A woman with blonde hair in a ponytail, wearing a blue t-shirt and jeans, is painting a wall with a roller. She is standing on a wooden step ladder. A dog is sitting on the floor, looking up at her. The room is in the process of being painted, with plastic covering the furniture and floor. The text "Home Improvement Projects" is overlaid in the center of the image.

# Home Improvement Projects

Completed and intended projects are outpacing reported planned projects prior to COVID-19, contributing to large category growth at home improvement retail.

■ HI Projects Planned Prior to CV ■ HI Projects Undertaken in 2020 ■ HI Projects Planned to Complete by EOY



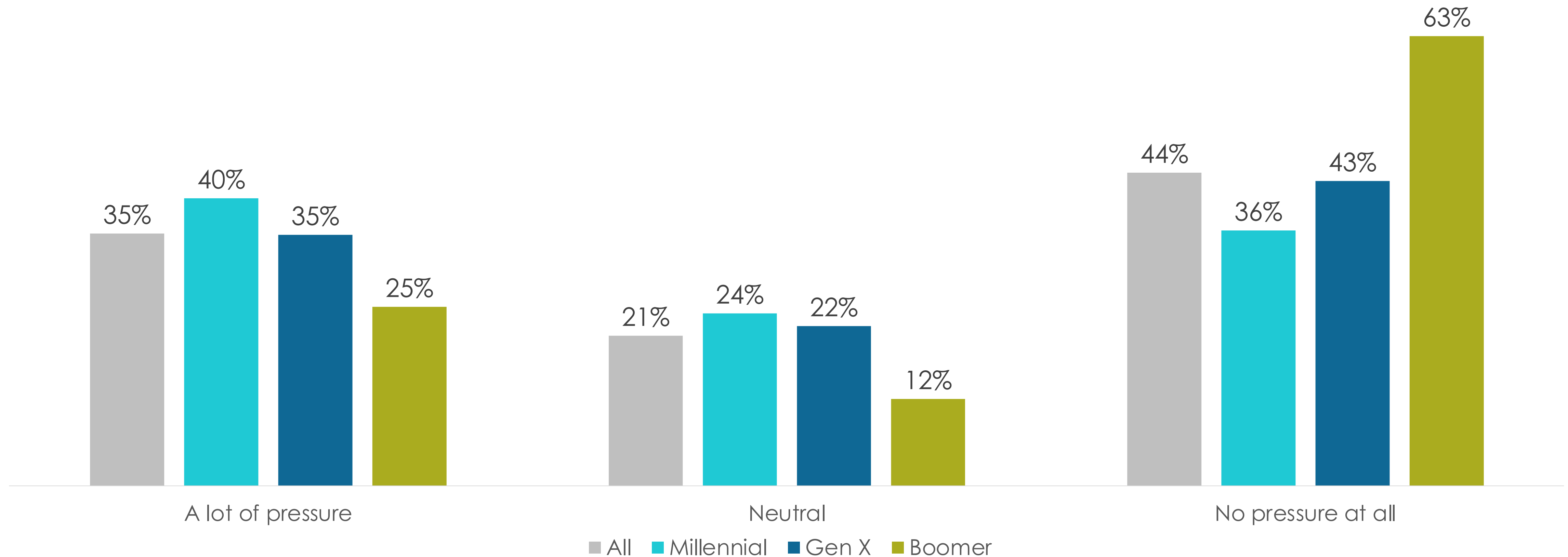
Which of the following home maintenance or improvement projects did you have planned **before** the COVID-19 outbreak?

Which of the following home maintenance or improvement projects have you undertaken in 2020?

Which of the following home maintenance or improvement projects do you plan to complete **before the end of the year?**

Despite reduced intentions to travel for the holidays, more than 1/3 are feeling pressure to complete home improvement projects by the end of the year.

Pressure felt to finish home improvement projects by the end of the year

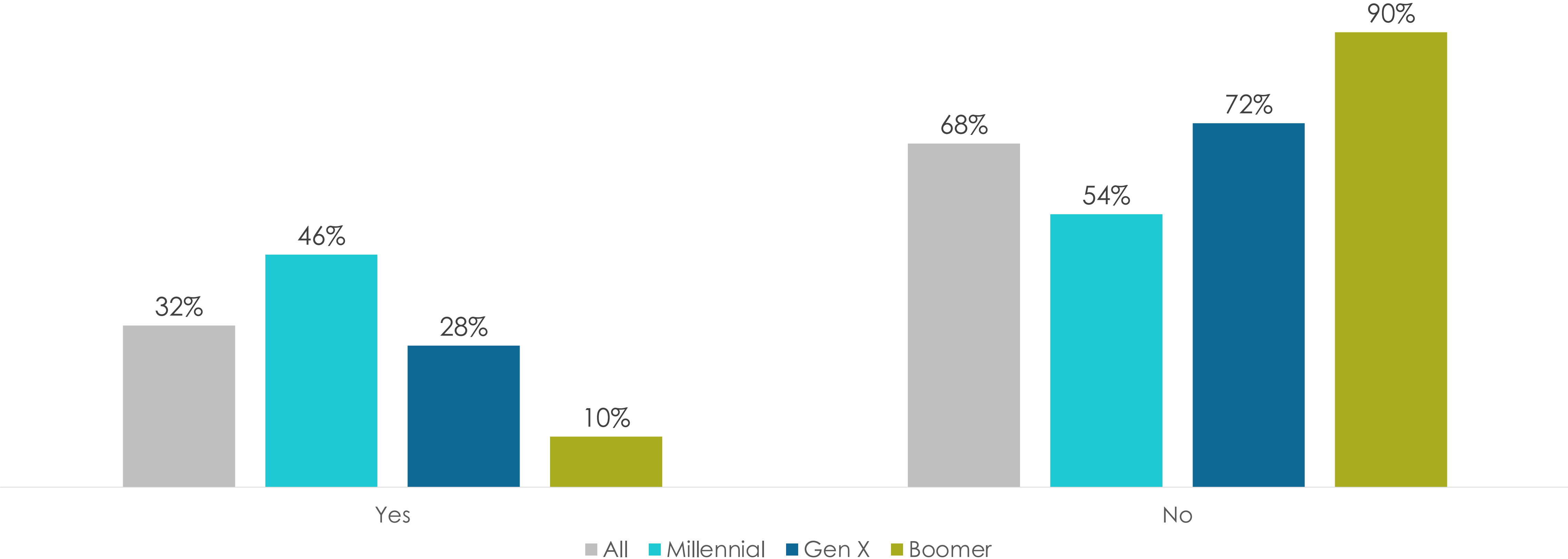


How much pressure are you feeling to finish your home improvement project(s) by the end of the year?



Nearly 1/3 of all consumers and half of Millennials reported the project they completed themselves this year was their first time taking on a project or repair.

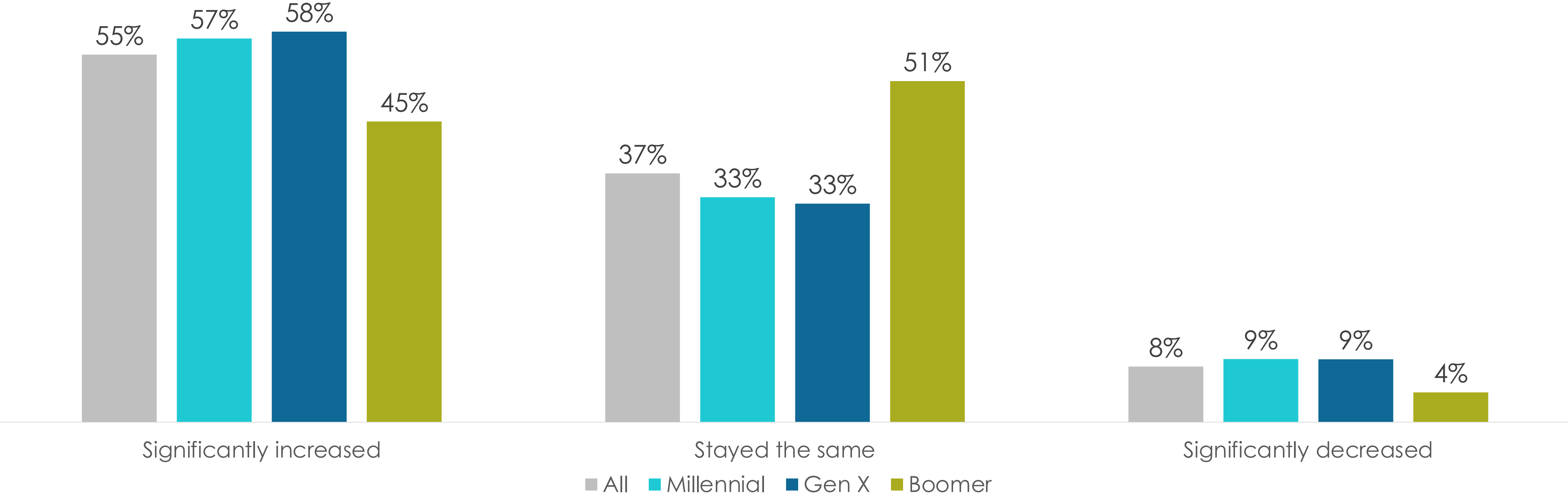
First time taking on a home improvement project/repair (%)



Was this your first time taking on a home improvement project or repair?

Subsequently, DIY'er confidence in completing projects and/or repairs has increased significantly among those taking on projects or repairs themselves.

Change in confidence of completing home improvement projects since the outbreak of COVID-19



How has your confidence in completing home improvement projects or repairs changed since the outbreak of COVID-19?

# Summary

## COVID-19 Hot Topics

- Consumer worry is relatively stable week-over-week (43% v. 46%).
  - Although COVID-19 (75%) and the state of the U.S. government (63%) are still the most common sources of worry, getting children a proper education is an increasingly common source of worry (57% compared to 47% last week).
- Self-reported flu shot adoption is much higher (61%) than in previous flu seasons (43% in 2018-19 season).
  - Boomers (67%) lead in flu shot adoption, as is usual, compared to Gen-X (59%) and Millennials (56%).
- Despite some optimistic reports that predict a vaccine by the end of the year, most consumers expect it to take 6 months or more.
- Most (87%) expect a large delay of at least 4 months between the initial availability of a vaccine for essential workers and "at-risk" people and the wider public availability of the vaccine.
- Uncertainty about receiving the COVID-19 vaccine has decreased (26% v. 36% in early Sept.), although not all who are certain intend to receive the vaccine

# Summary – Continued

## Hobbies and Home Improvement Projects

- Participation on some hobbies has waned since the initial lockdown in April; this is likely due to the loosening of lockdown restrictions, the return of many sports, and other ways to spend time.
- The number of home improvement projects completed (or intended to complete in 2020) outpaces the number of projects planned prior to COVID-19. This is a likely source of the large growth in home improvement sales.
- Although prior studies indicated reduced intentions to travel for the holidays; many consumers are feeling pressure to finish home improvement projects prior to the end of the year (35%).
- Nearly 1 in 3 consumers overall and almost half of all Millennials (46%) indicated that the project/repair they completed this year was their first time completing such a project.
  - DIY confidence among those completing projects/repairs this year is up (55% reporting increased confidence); these people could potentially become a new wave of empowered DIY'ers.