



# COVID-19 U.S. CONSUMER IMPACT TRACKING STUDY – WEEK 31

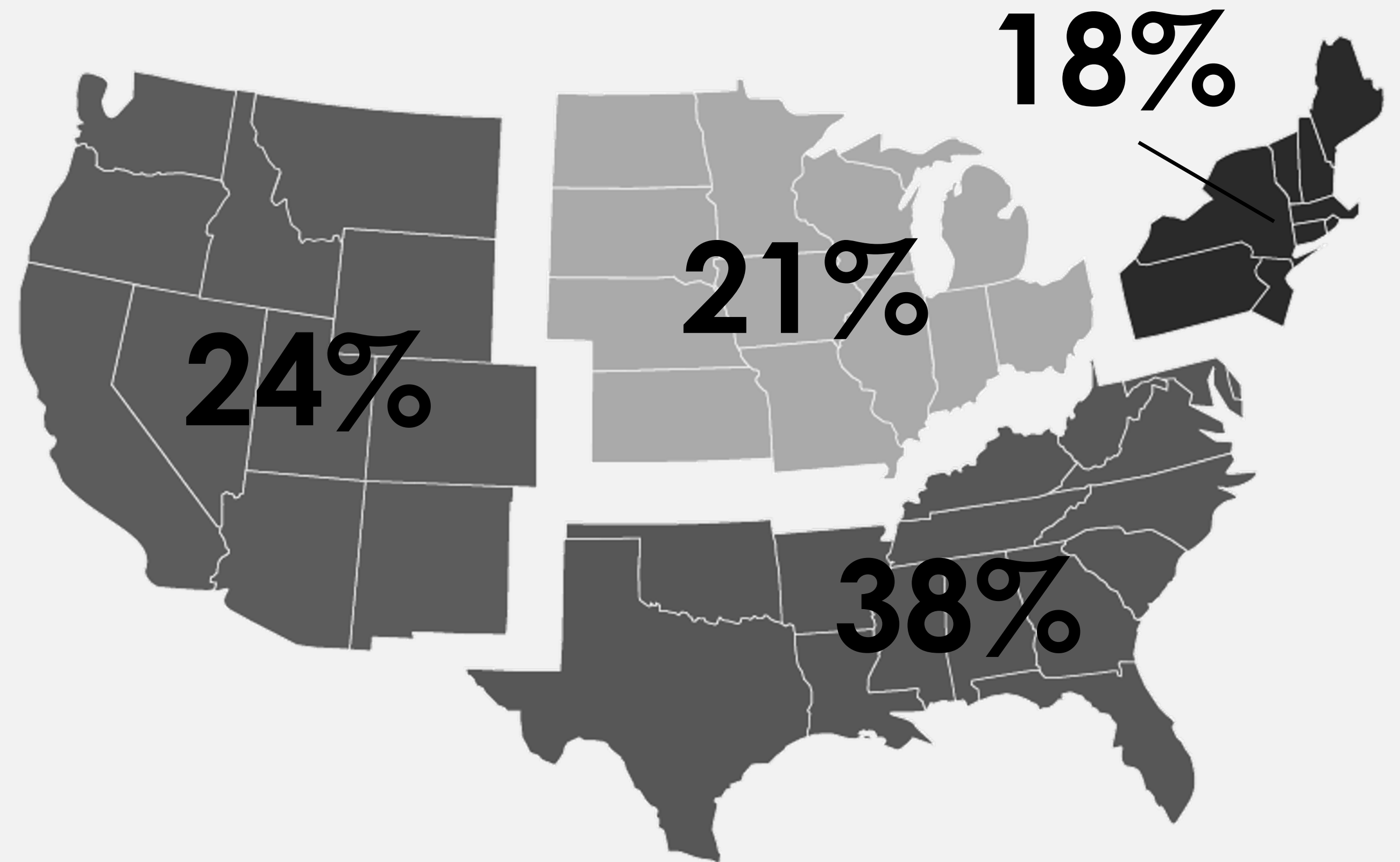
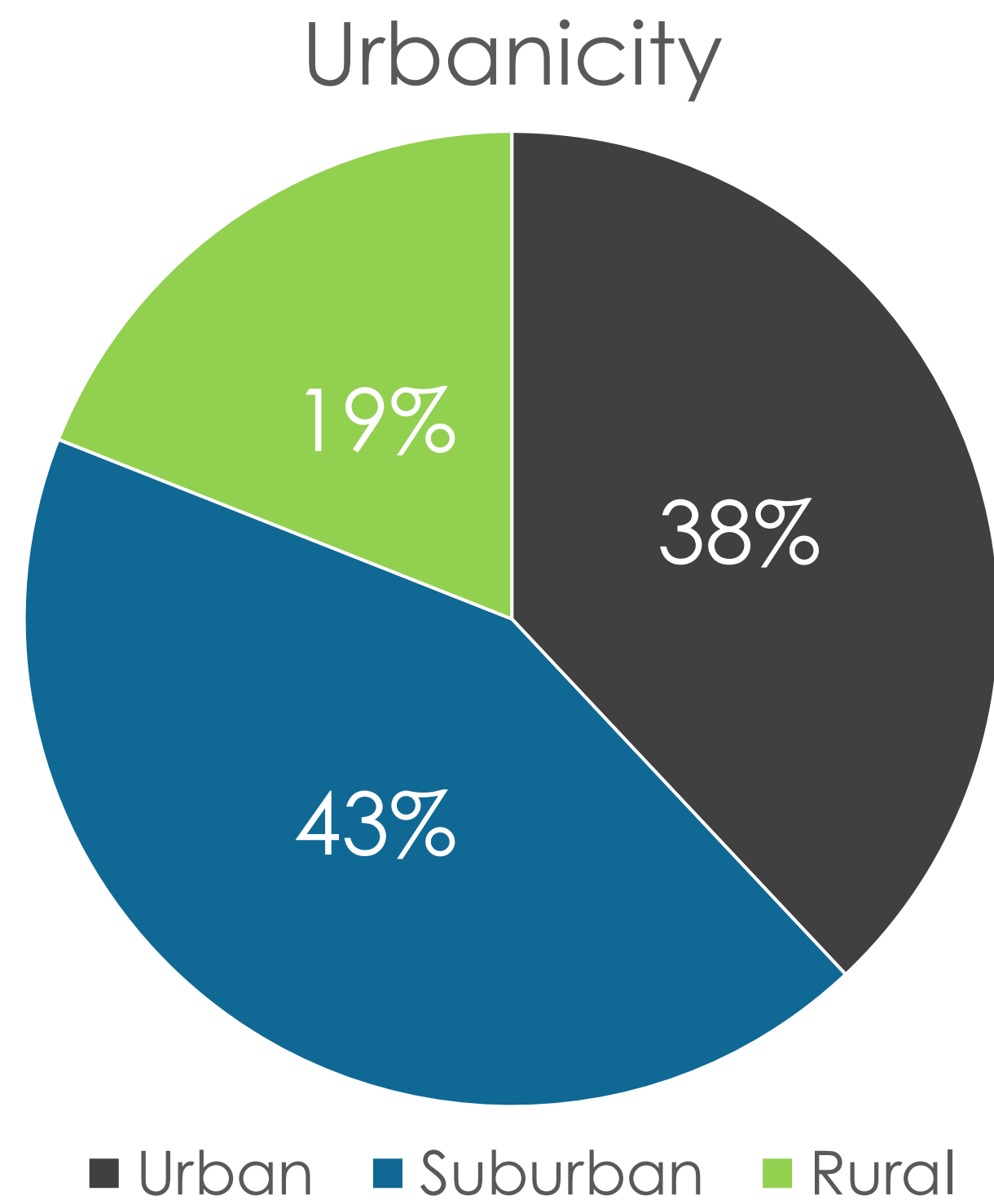
PRESENTED OCTOBER 6, 2020

# Methodology

- N = 1,133
- MOE =  $\pm 2.91\%$
- Panel: General Population
- Collected: 09/24/20, 09/25/20
  
- N = 558
- MOE =  $\pm 4.15\%$
- Panel: General Population
- Collected: 10/01/20, 10/02/20

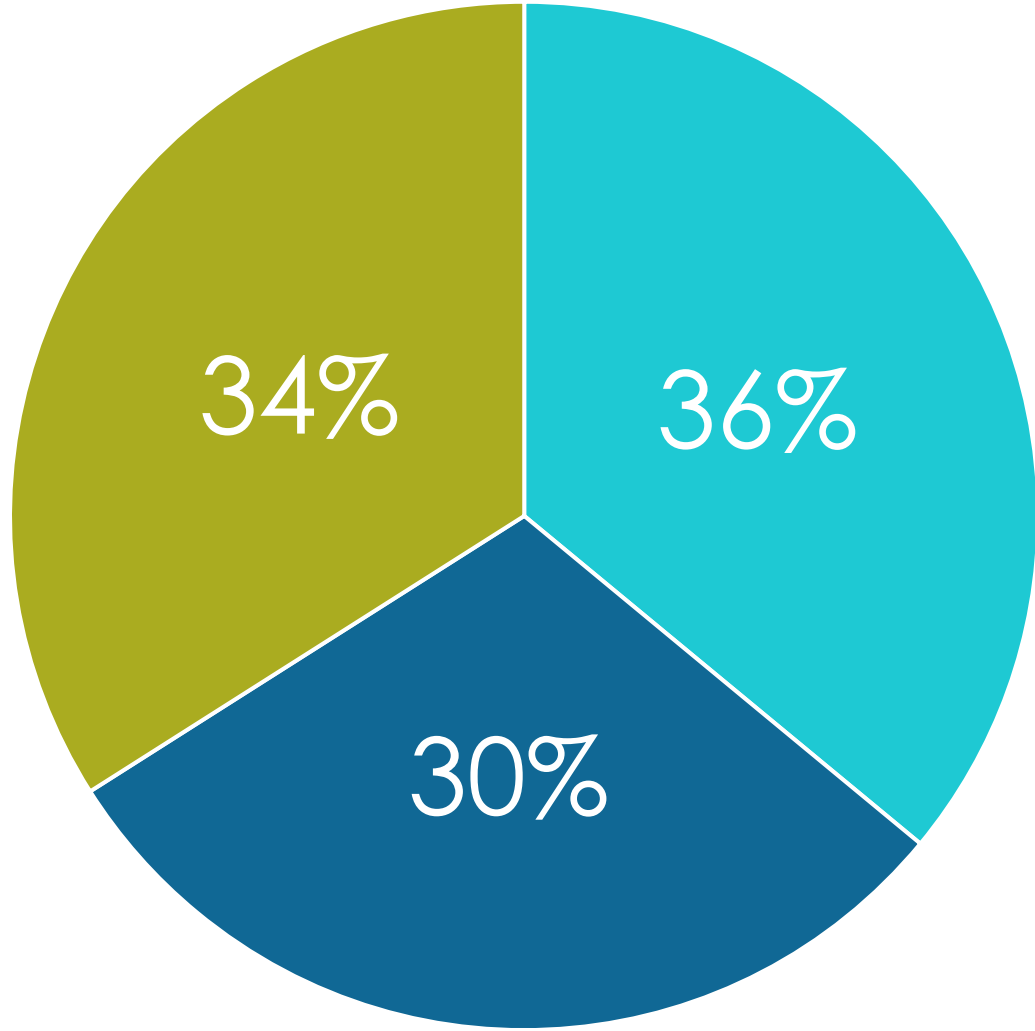


# Panel composition



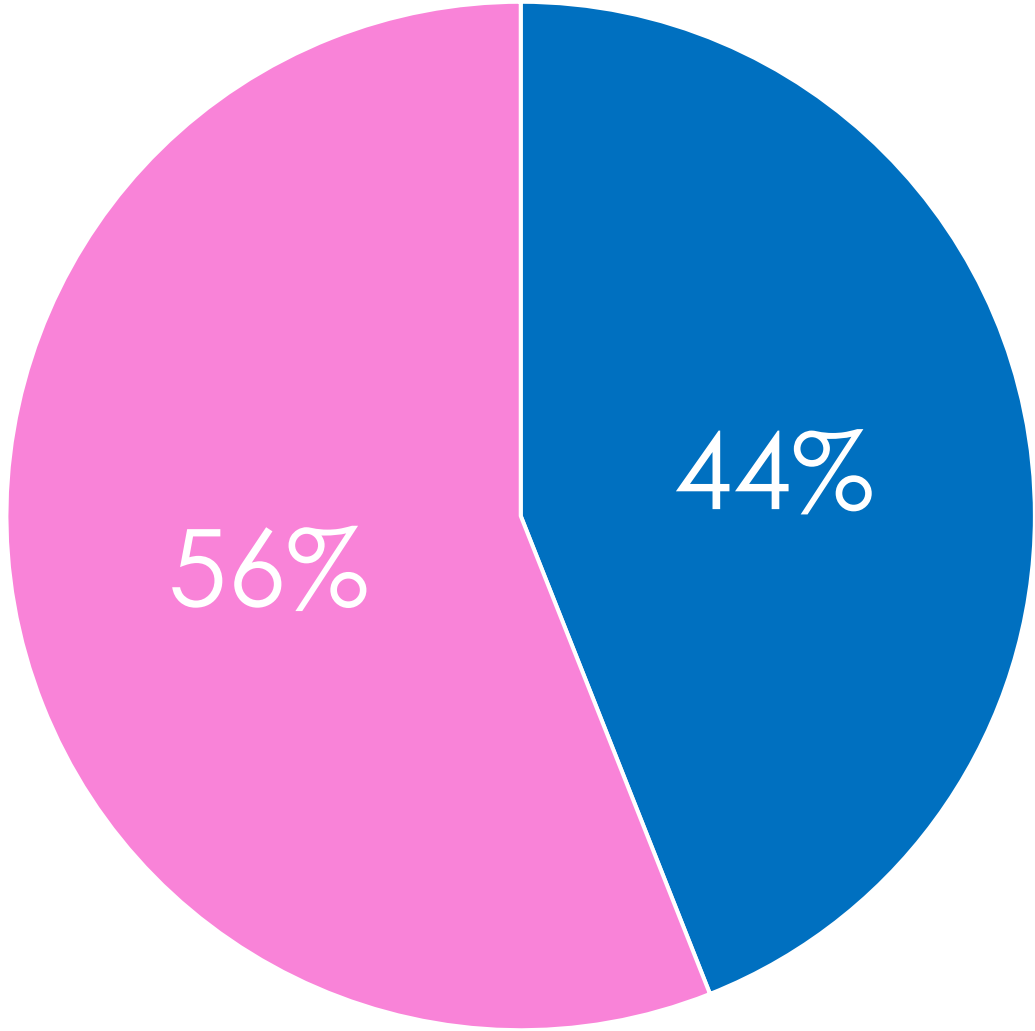


Generation



■ Millennial ■ Gen X ■ Boomer

Gender



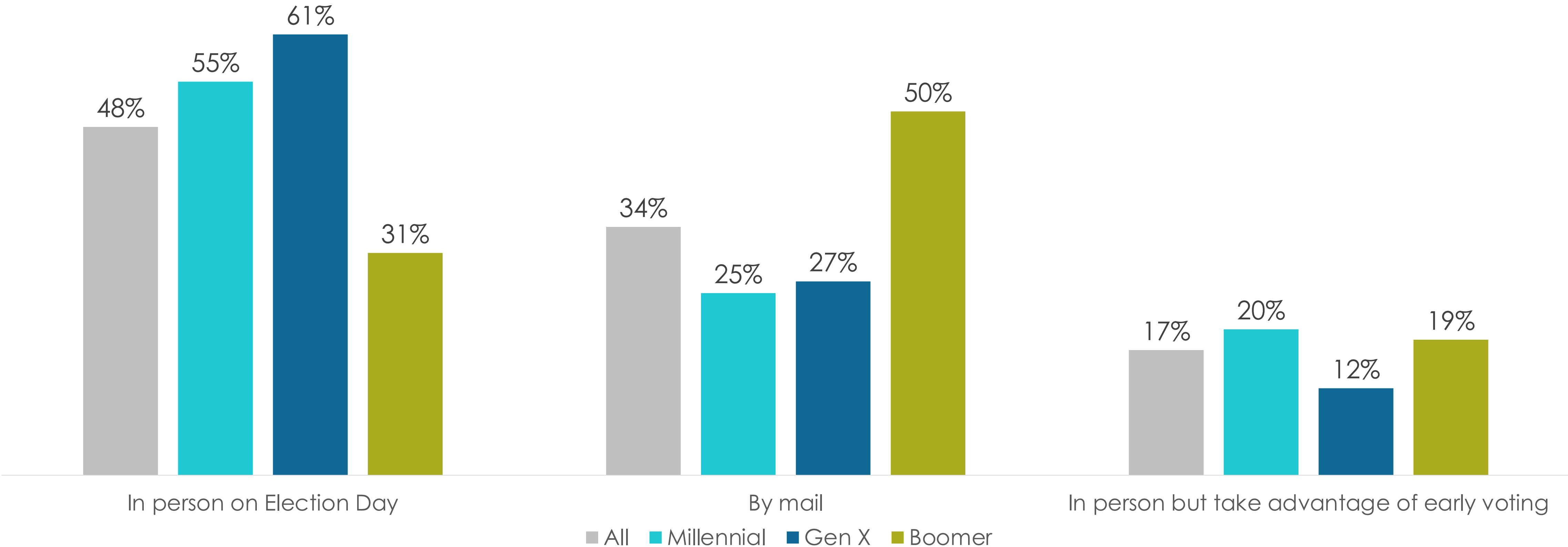
■ Male ■ Female

# COVID-19 Hot Topics



More than half (52%) of those planning to vote in the November election will not be doing so in person on Election Day. 34% plan to vote by mail and 17% plan to vote early.

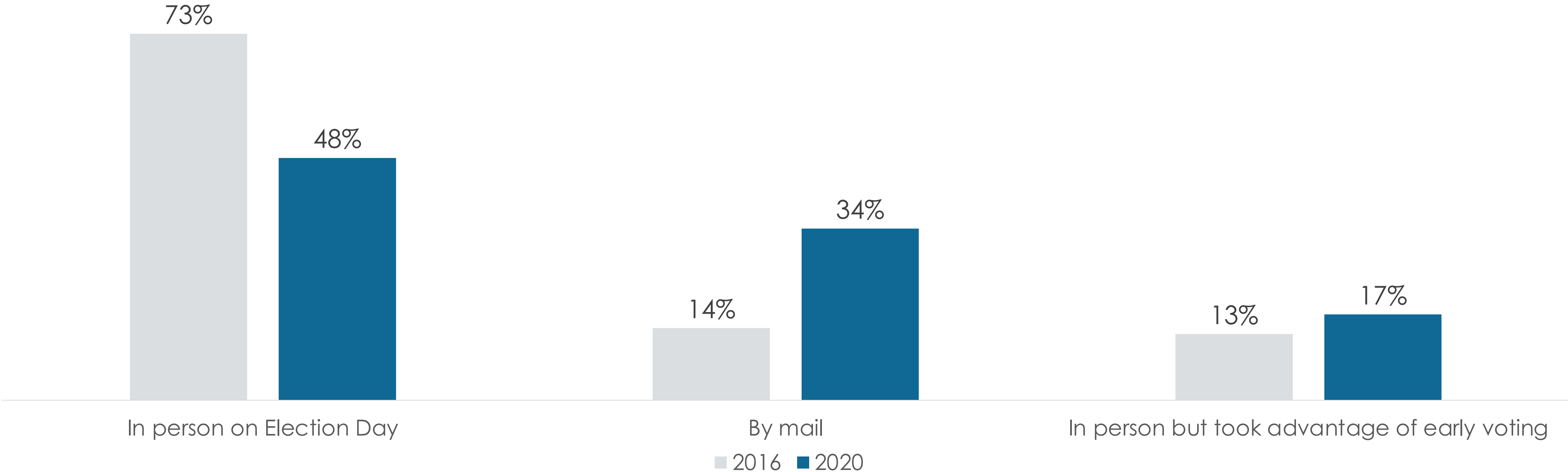
Method of voting in 2020



How do you plan to vote this year?

The challenge states will be facing to deliver timely election results is evident in the more than doubling (34% vs. 14%) of ballots that will be received by mail.

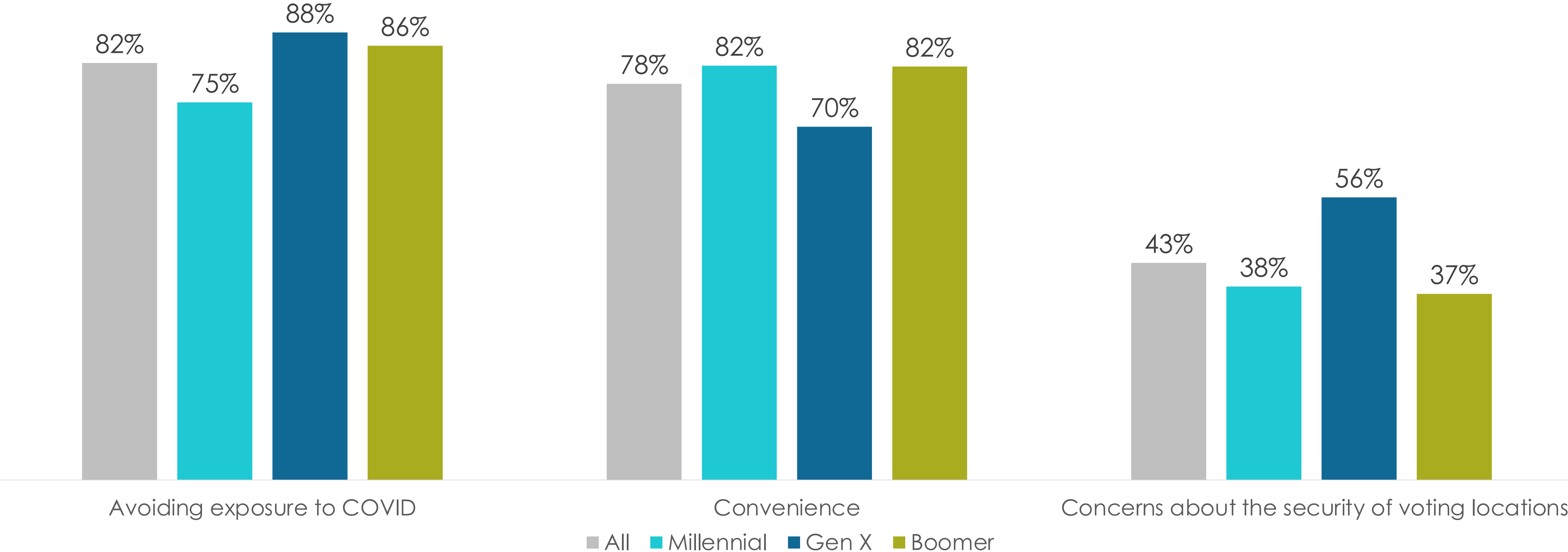
Method of voting in 2016 v. 2020 election



How did you vote in the 2016 election?

While COVID concerns and convenience are the primary drivers of mail-in voting, 43% of respondents express some concern about about the security of voting locations.

Influence on voting by mail

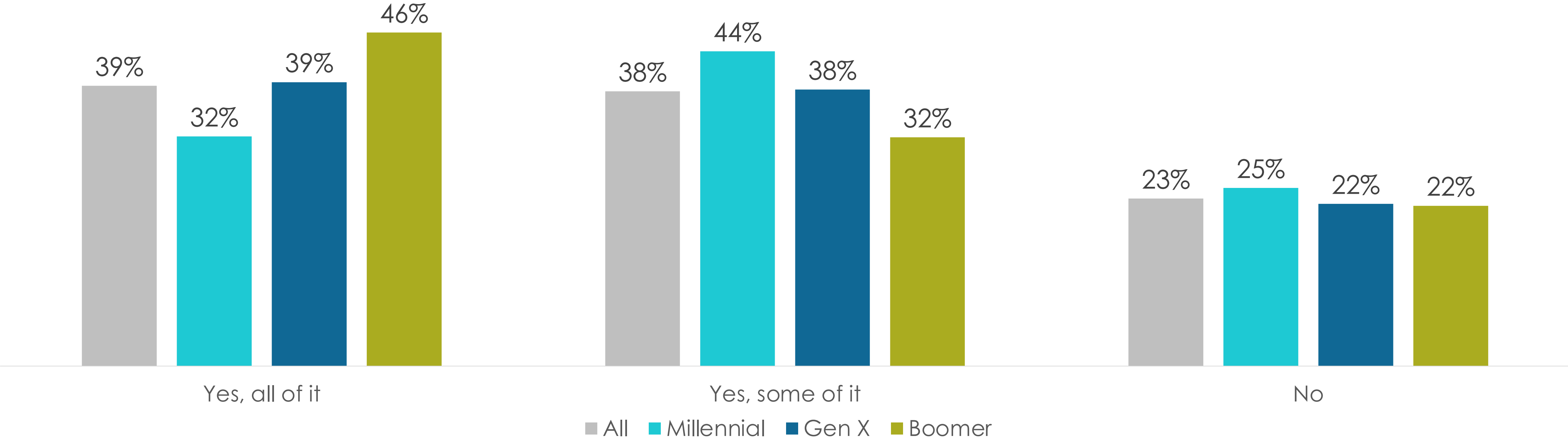


How influential are the following on your decision to vote by mail?



77% of respondents report watching all (39%) or some (38%) of the first Presidential debate.

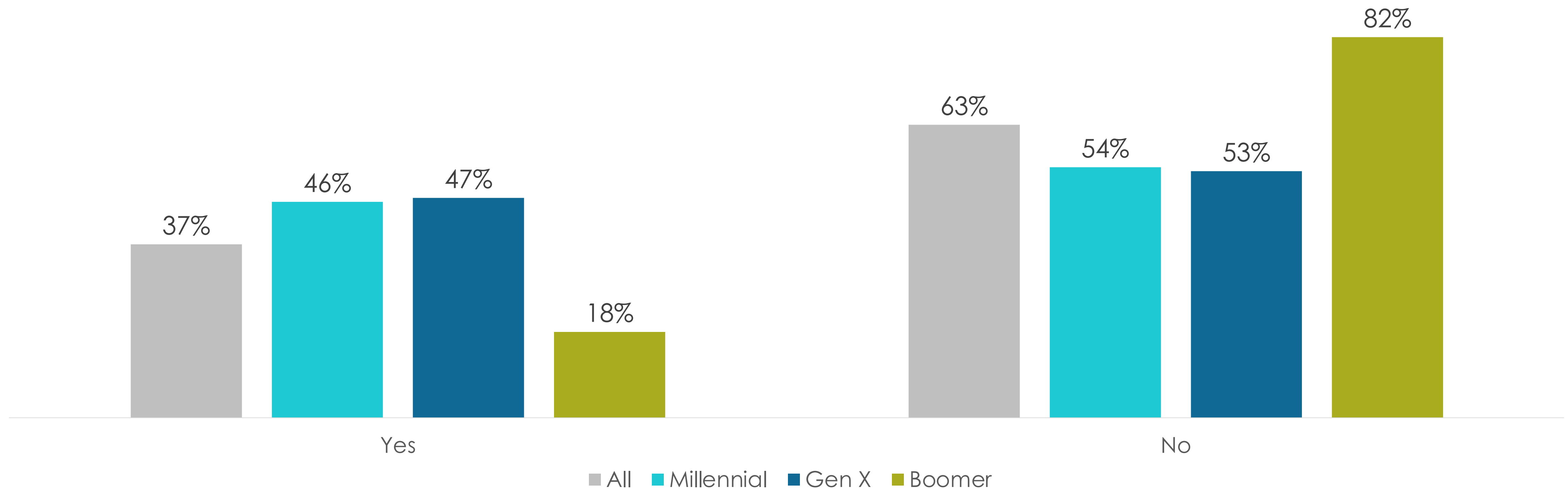
Watched September 29<sup>th</sup> presidential debate



Did you watch the September 29th Presidential debate between Trump and Biden?

Among the viewers, 37% had their opinion changed about the timeline for bringing the Coronavirus under control.

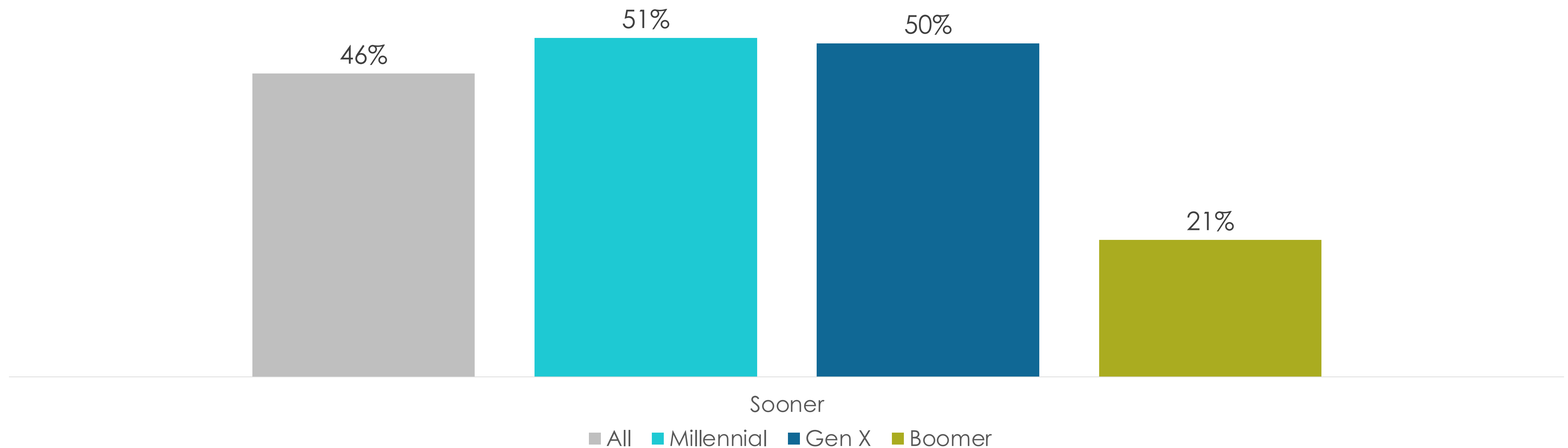
Debate discussion about COVID-19: Impacting perception of timeline for COVID to be brought under control



Did the debate discussion regarding COVID-19 impact how quickly you think the virus can be brought under control?

Nearly half (46%) of those whose opinion changed as a result of what they heard in the debate feel the virus will be brought under control more quickly. Boomers remain the most skeptical.

Debate discussion about COVID-19: Think COVID will be brought under control sooner/later than thought prior

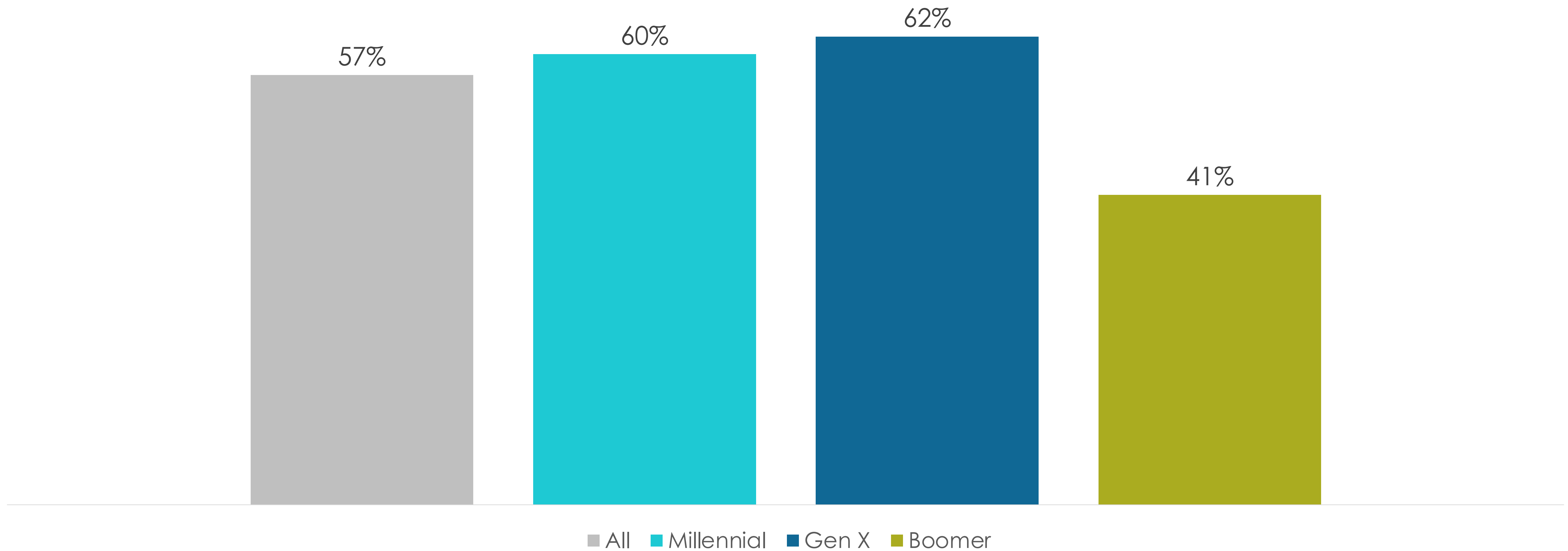


Did the debate discussion regarding COVID-19 impact how quickly you think the virus can be brought under control?

# Working from Home

57% of employed respondents report working from home.

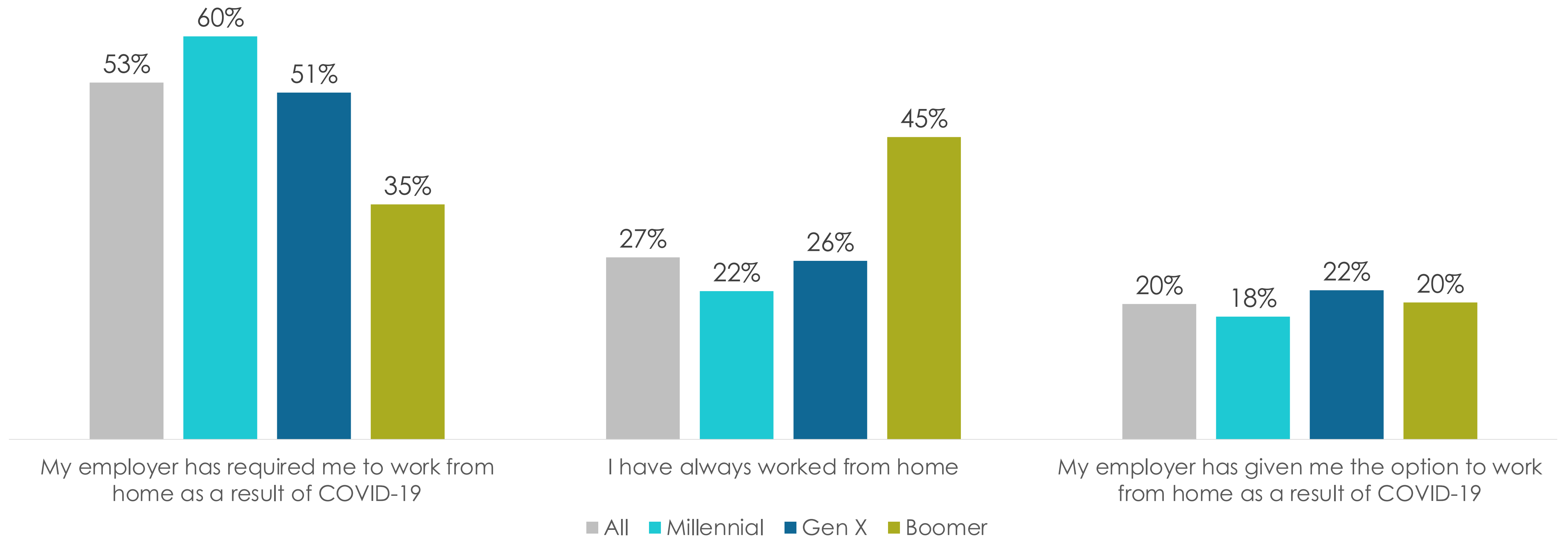
Those who are currently working from home



Are you currently working from home?

More than half (53%) of those working from home are doing so as it is required by their employer while 20% are exercising their own discretion.

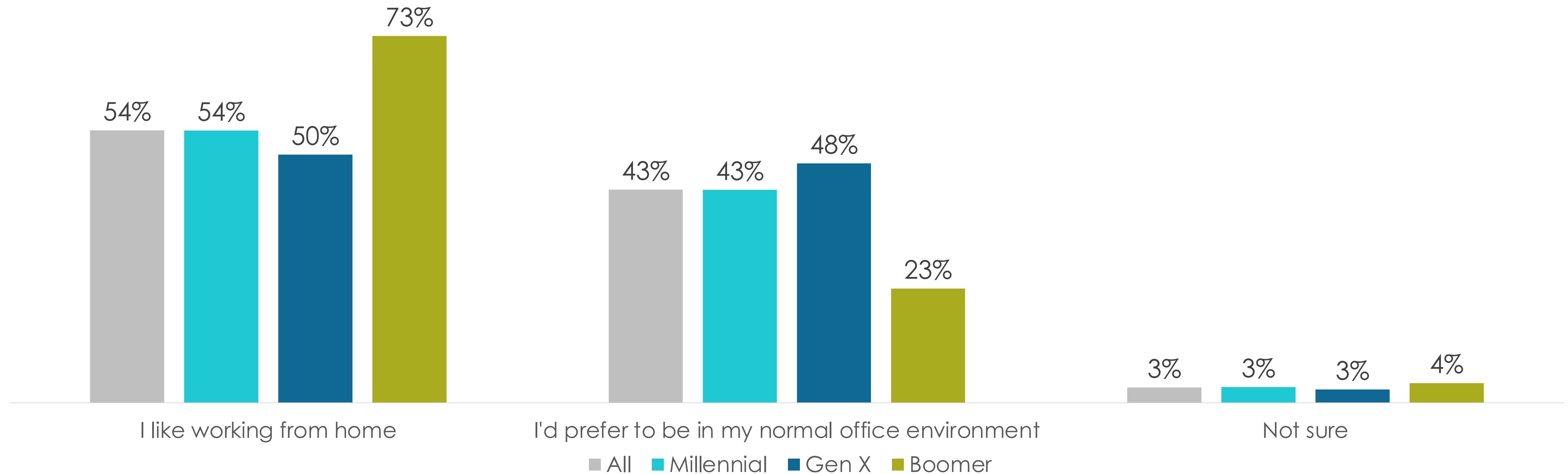
### Reasons for working from home



Which of the following best describes your reason for working from home?

Opinions on working from home are mixed. 54% like working from home while 43% would prefer to be in their normal working environment.

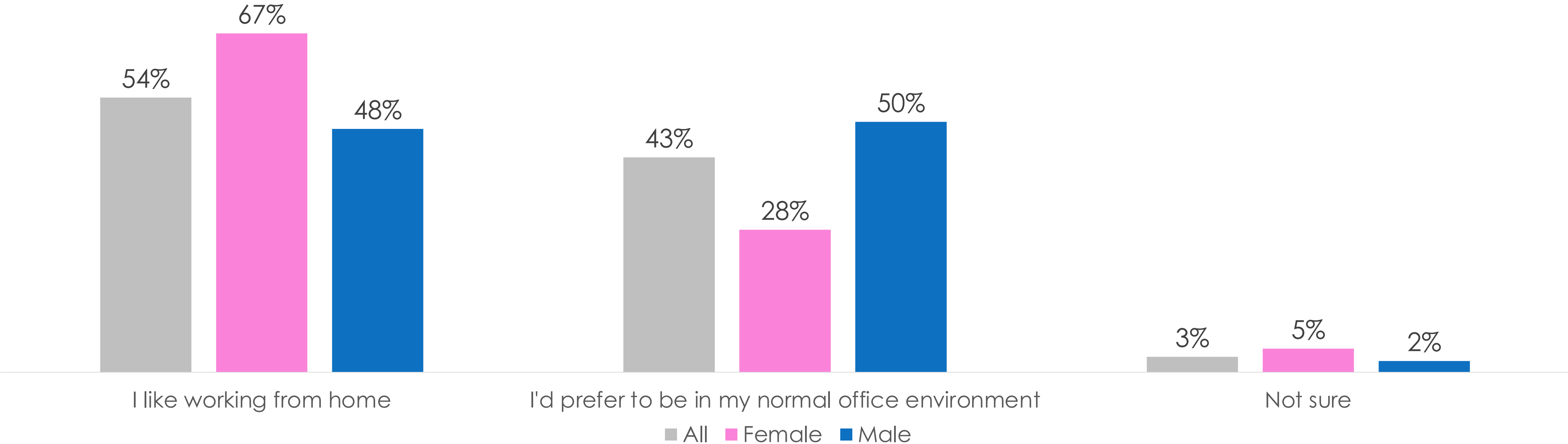
### Feeling on working from home



Which of the following best describes how you feel about working from home?

Two-thirds of women enjoy working from home while less than half (46%) of men share the sentiment.

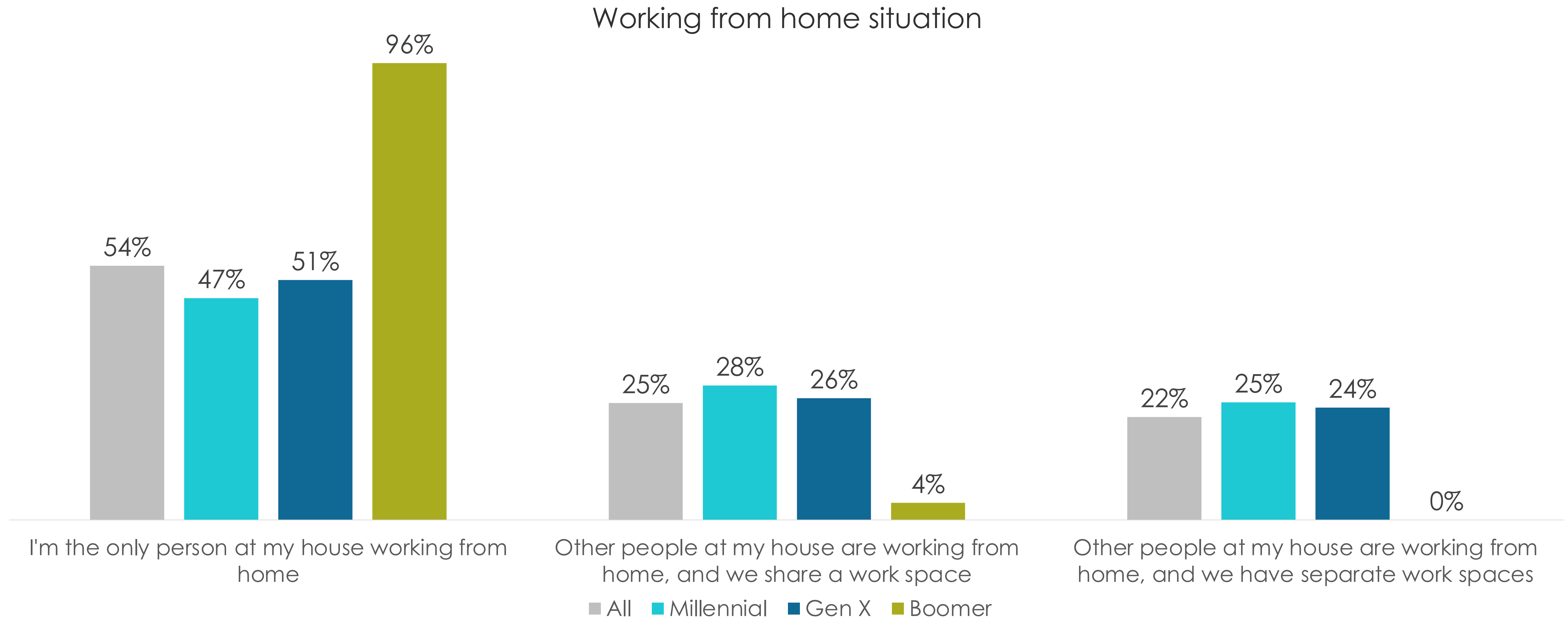
Feeling on working from home



Which of the following best describes how you feel about working from home?



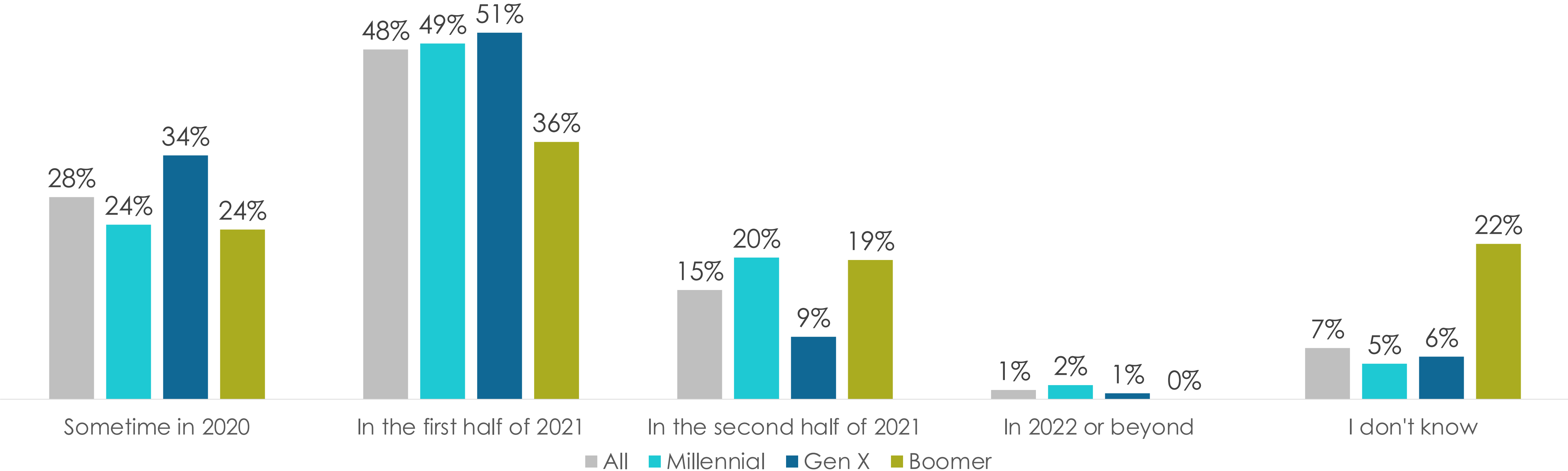
In 47% of cases there is more than one person working from home, and in more than half of those cases the workspace is being shared.



Which of these best describes your work from home situation?

Despite there being only 90 days left in 2020, more than one-quarter (28%) of respondents feel they'll return to their office sometime this year. The most common opinion (48%) is that a return to the office will occur in the first half of 2021.

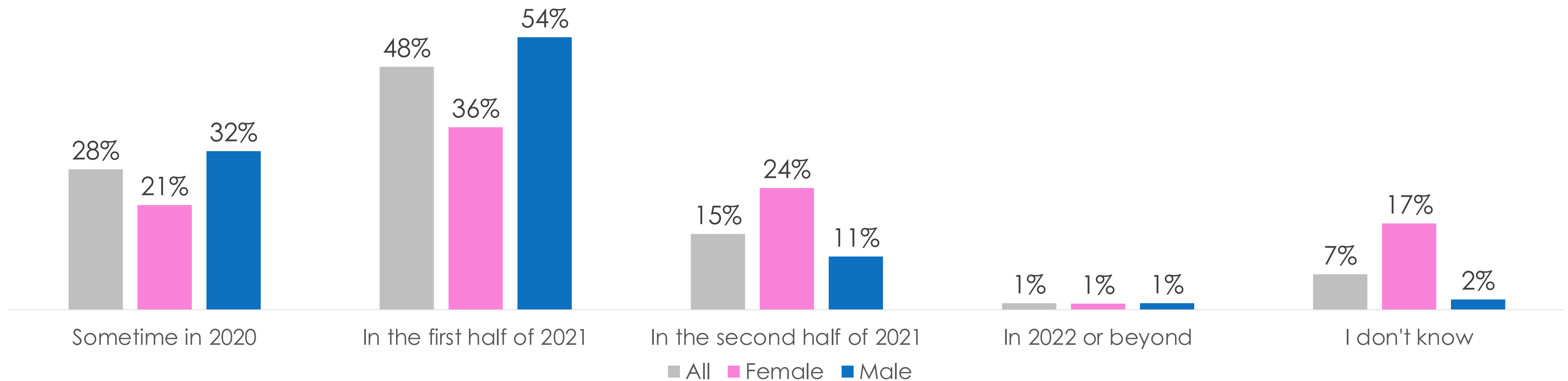
Expectation of returning to the workplace



What is your best expectation of when you will return to your workplace?

Women are much less confident in a quick return to the office. One-quarter think it will be the second half of 2021 or beyond.

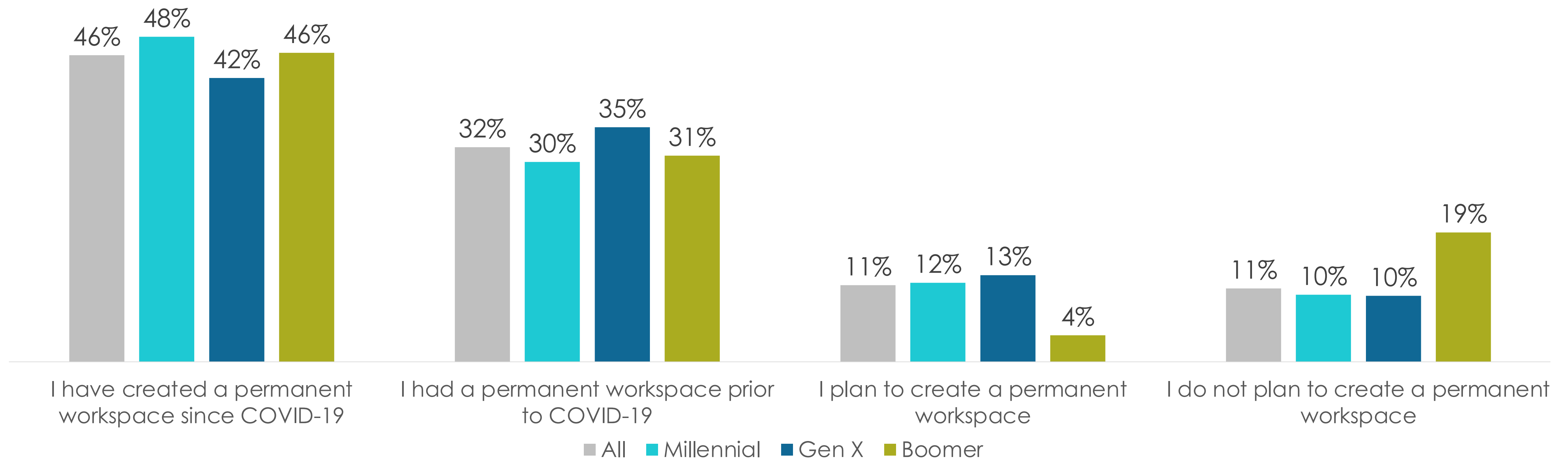
### Expectation of returning to the workplace



What is your best expectation of when you will return to your workplace?

Nearly one-third (32%) of people working from home already had a permanent home workspace prior to COVID, while nearly half (46%) have created one.

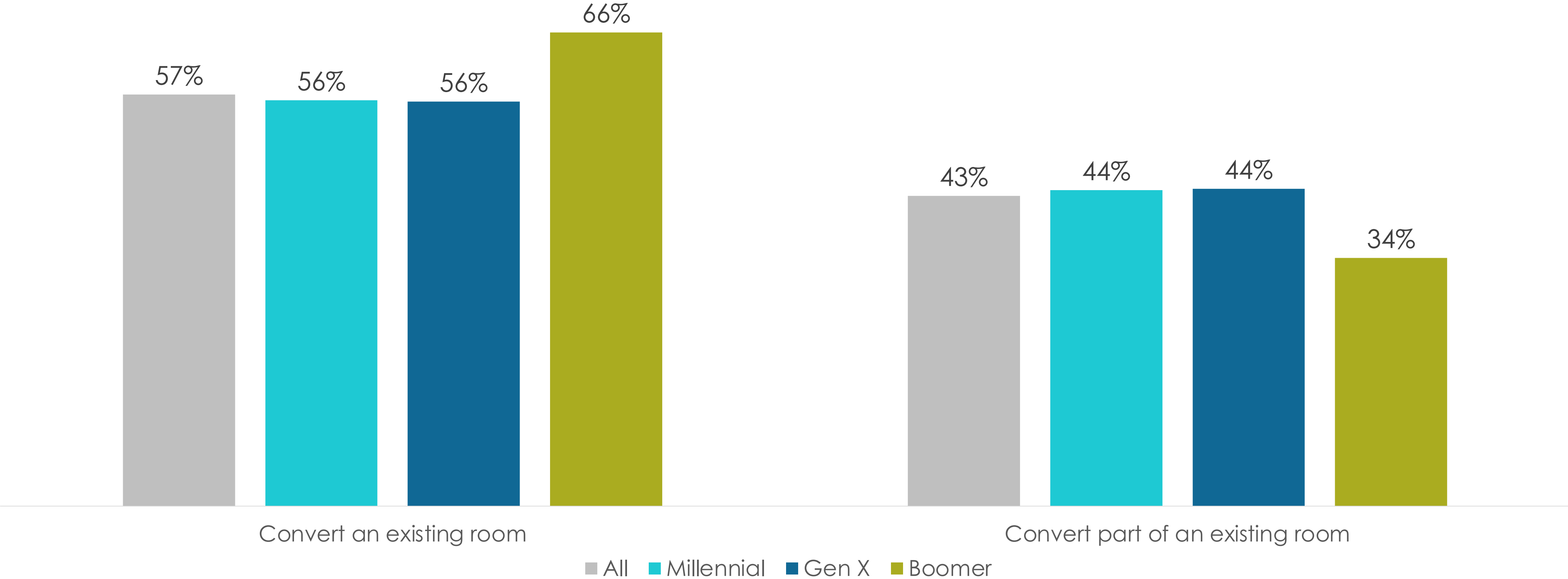
### Intentions for permanent workspace in home



Which of the following best describes your intentions for a permanent workspace in your home?

In the majority of cases (57%) an entire room has been converted to an office. In 43% of cases, only a portion of a room has been repurposed.

Workspace creation completed or intending to complete

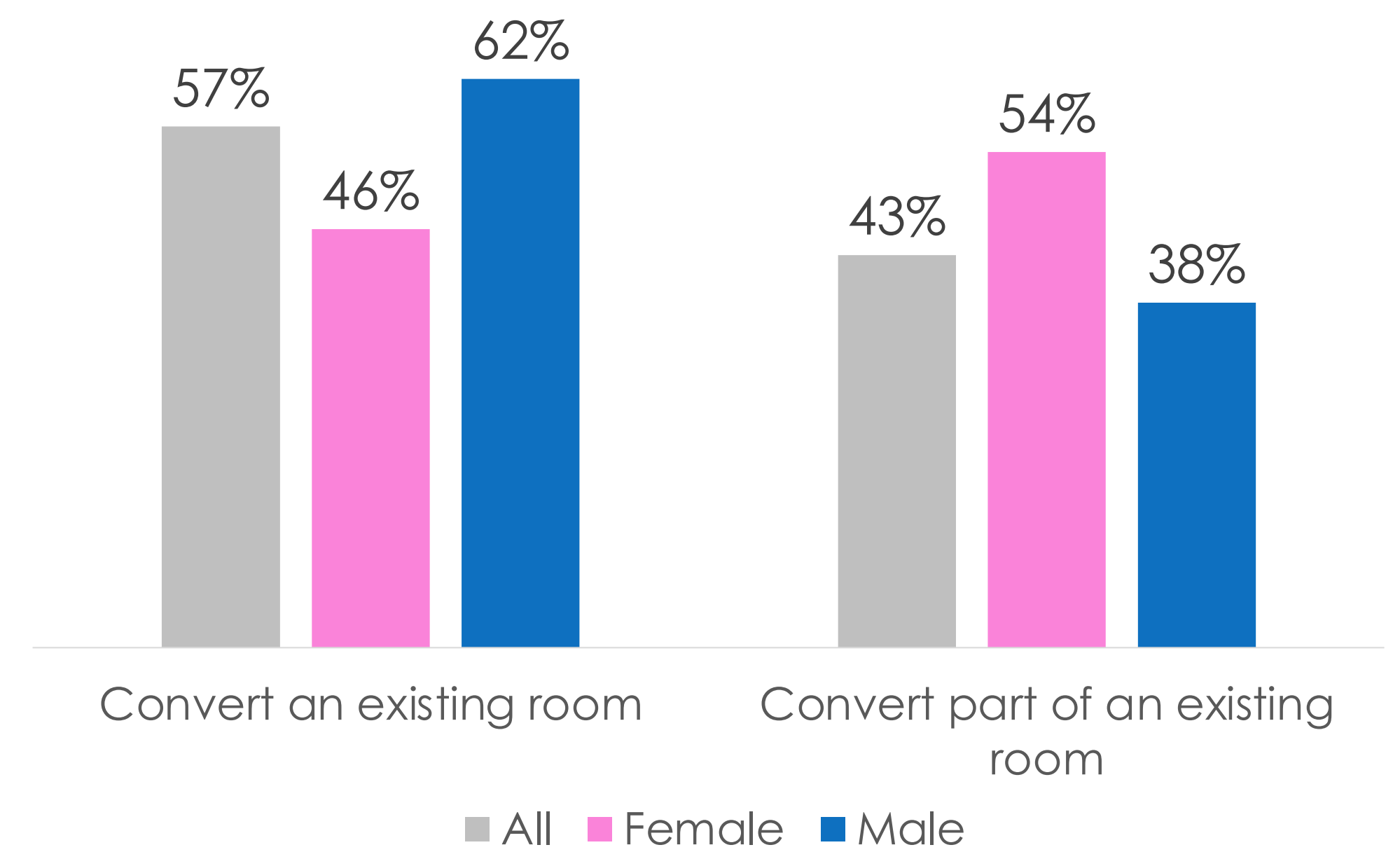


Which of the following describes how you have/intend to create a permanent workspace in your home?



More than half (54%) of women are using a portion of a room while only 38% of men are doing so.

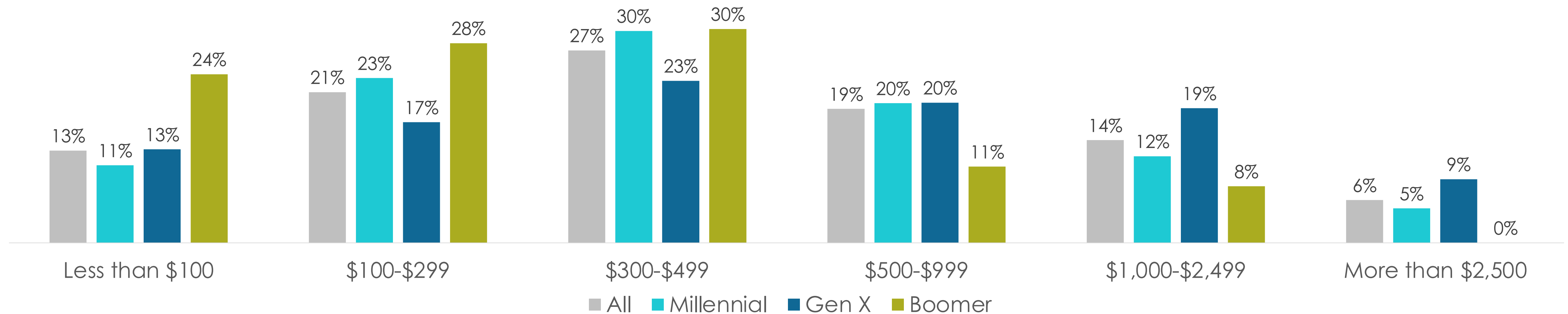
Workspace creation completed or intending to complete



Which of the following describes how you have/intend to create a permanent workspace in your home?

Boomers are spending the least on their home office conversion. More than half (52%) of Boomers have or plan to spend less than \$300 to create a permanent workspace.

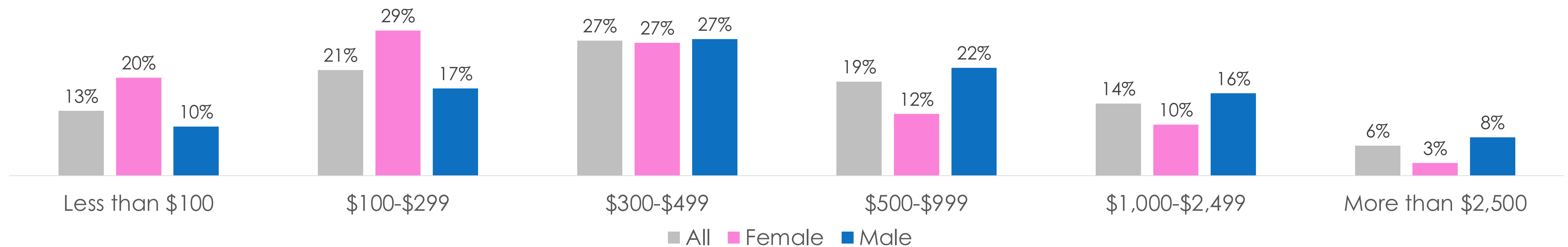
Amount spent/intending to spend on creating a permanent workspace



How much did you or do you plan to spend in creating a permanent workspace?

Women are getting by with a smaller spend. Only 25% have or plan to spend more than \$500 as compared to 44% of men.

Amount spent/intending to spend on creating a permanent workspace

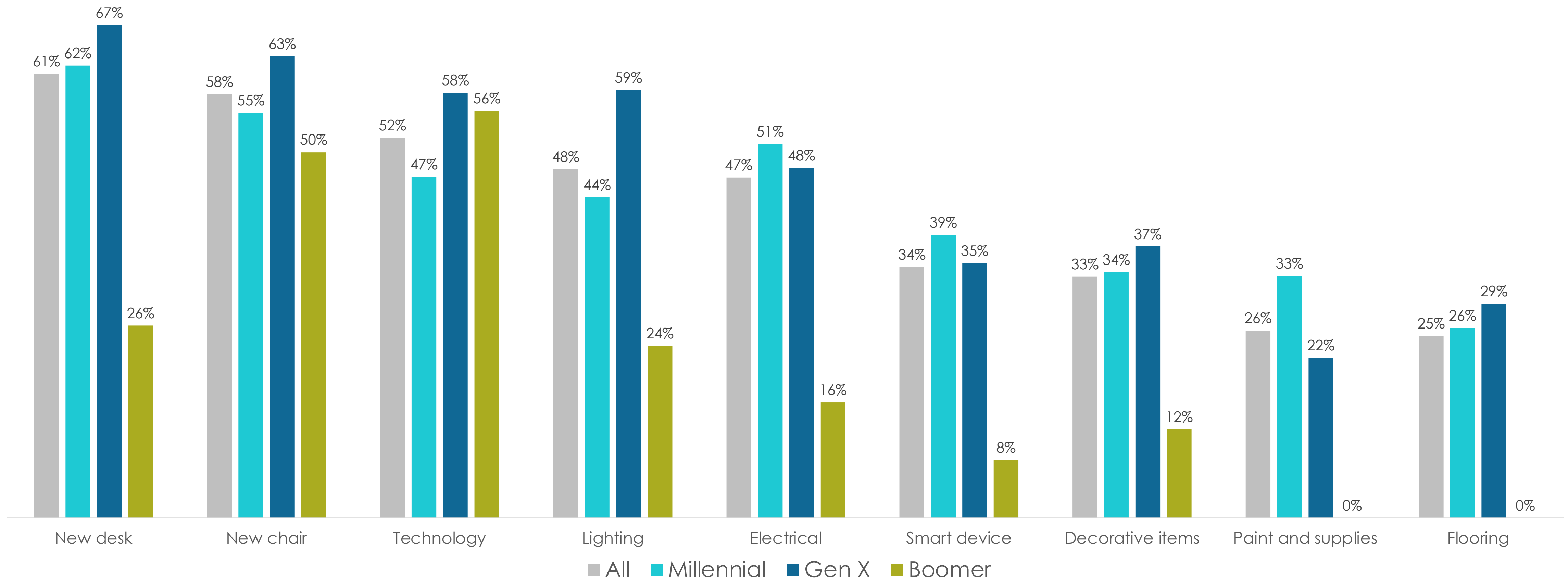


How much did you or do you plan to spend in creating a permanent workspace?



Desks (61%), chairs (58%) and technology (52%) are the categories a majority people are buying for their permanent workspace. Consistent with their lower spending level, Boomers are buying in fewer categories.

Purchases for permanent workspace



As a part of creating a permanent workspace, which of the following did/do you intend to purchase? Select all that apply.

# Summary

## COVID-19 Hot Topics

- More than half (52%) of those planning to vote in the November election will not be doing so in person on Election Day.
  - 34% plan to vote by mail, and 17% plan to vote early.
- The challenge states will be facing to deliver timely election results is evident in the more than doubling (34% v. 14%) of ballots that will be received by mail.
- COVID concerns and convenience are the primary drivers of mail-in voting; however, 43% of respondents express some concern about the security of voting locations.
- 77% of respondents report watching at least a portion of the first Presidential debate.
  - 39% watched the whole broadcast, and 38% watched a portion.
- Among the viewers, 37% had their opinion changed about the timeline for bringing the Coronavirus under control.
  - Nearly half (46%) of those whose opinion changed as a result of what they heard in the debate feel the virus will be brought under control more quickly.
  - Boomers remain the most skeptical, with only 21% feeling more confident about a timely control of the virus.

# Summary - Continued

## Working from Home

- 57% of employed respondents report working from home.
  - Only 41% of Boomers are doing so compared to 60% or more of GenXers and Millennials.
- More than half (53%) of those working from home are doing so as it is required by their employer.
  - 20% are exercising their own discretion.
- Opinions on working from home are mixed. 54% like working from home, while 43% would prefer to be in their normal working environment.
  - Nearly three-quarters (73%) of Boomers prefer the at-home option.
  - Two-thirds of women enjoy working from home, while less than half (46%) of men share the sentiment.
- In 47% of cases, there is more than one person working from home, and in more than half of those cases, the workspace is being shared.

## Summary - continued

- Despite there being only 90 days left in 2020, more than one-quarter (28%) of respondents feel they'll return to their office sometime this year.
  - The most common opinion is that a return to the office will not occur until the first half of 2021.
- Women are much less confident in a quick return to the office. One-quarter think it will be the second half of 2021 or beyond.
  - Only 12% of men think a return to the office will be delayed that long.
- Nearly one-third (32%) of people working from home already had a permanent home workspace and nearly half (46%) have created one.
  - 11% still plan to create a permanent workspace at home.
- In the majority of cases (57%) an entire room has been converted to an office.
  - In 43% of cases only a portion of a room has been repurposed.
  - More than half (54%) of women are using a portion of a room while only 38% of men are doing so.

## Summary - continued

- Boomers are spending the least on their home office conversion. More than half (52%) have or plan to spend less than \$300.
  - Two-thirds of Millennials and 71% of GenXers have or plan to spend more than \$300.
  - Women are getting by with a smaller spend. Only 25% have or plan to spend more than \$500 as compared to 44% of men.
- Desks (61%), chairs (58%) and technology (52%) are the categories a majority people are buying for their permanent home workspace.
  - Consistent with their lower spending level, Boomers are buying in fewer categories.