



# COVID-19 U.S. CONSUMER IMPACT TRACKING STUDY – WEEK 35

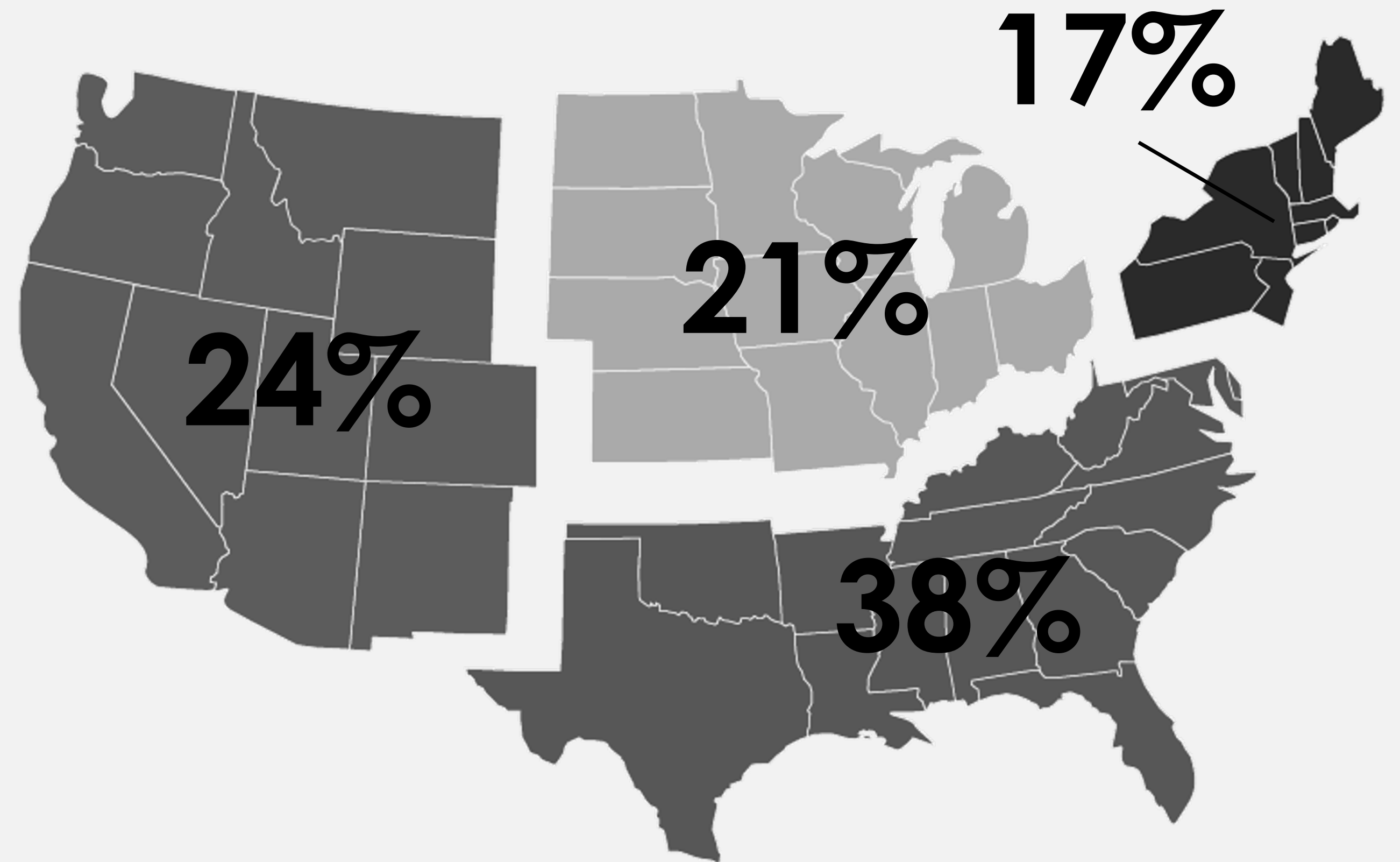
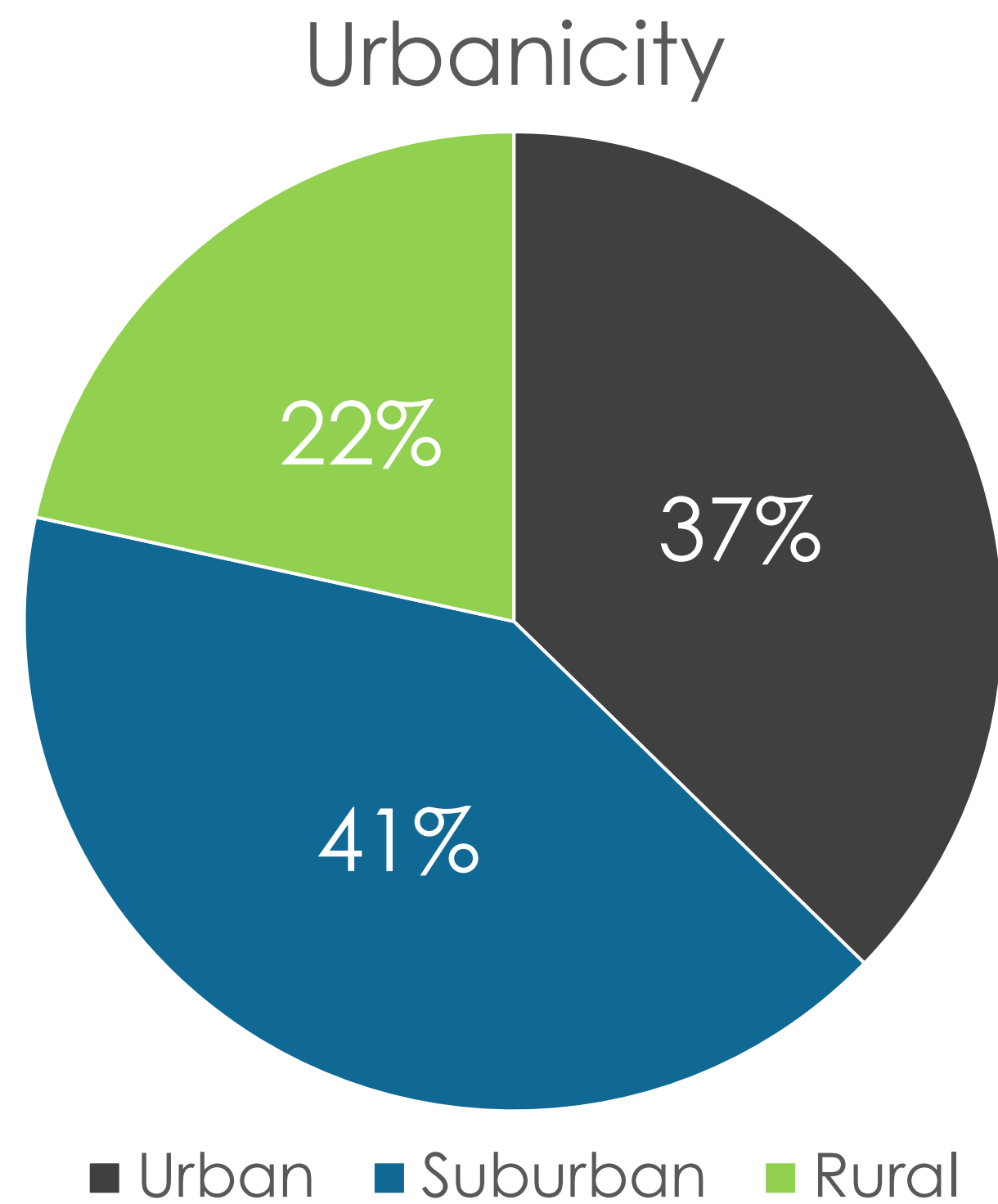
PRESENTED NOVEMBER 2, 2020

# Methodology

- N = 627
- MOE =  $\pm 3.91\%$
- Panel: General Population
- Collected: 10/29/20, 10/30/20

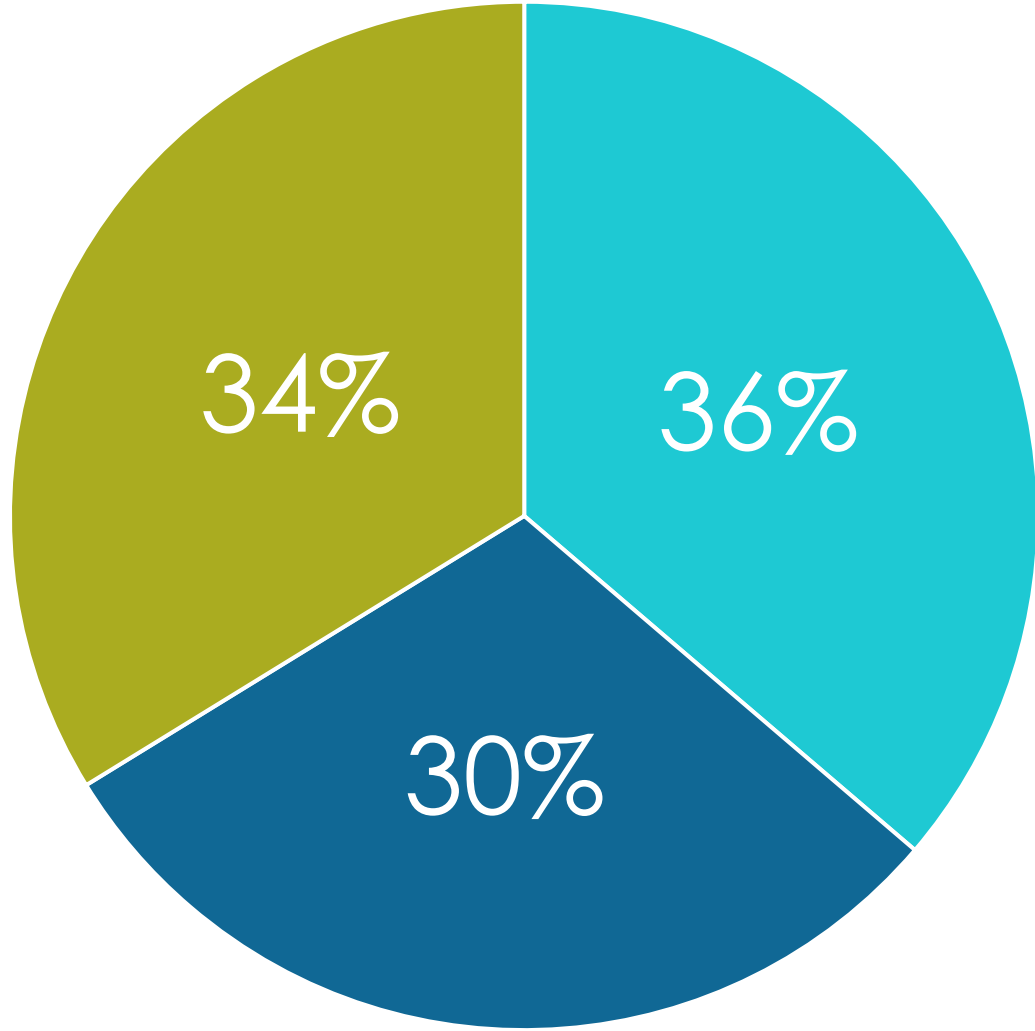


# Panel Composition



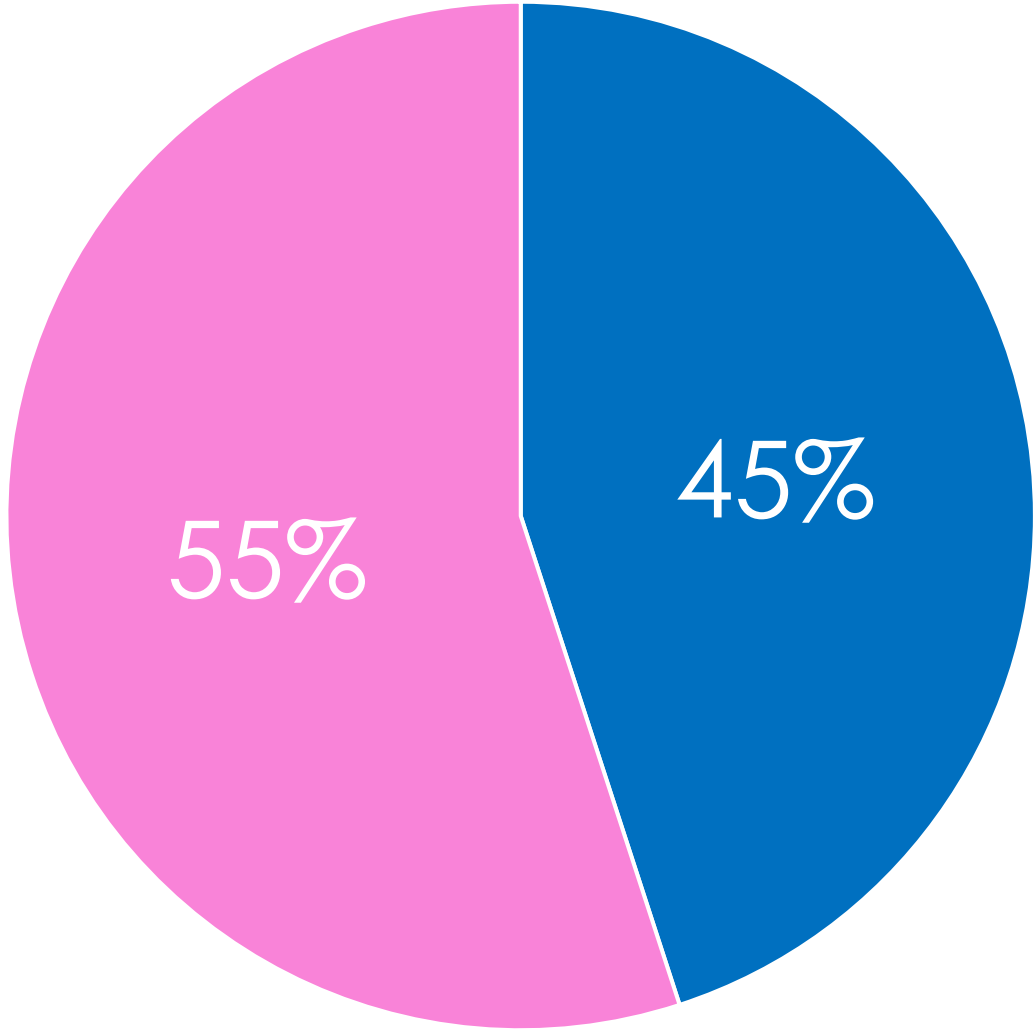


Generation



■ Millennial ■ Gen X ■ Boomer

Gender



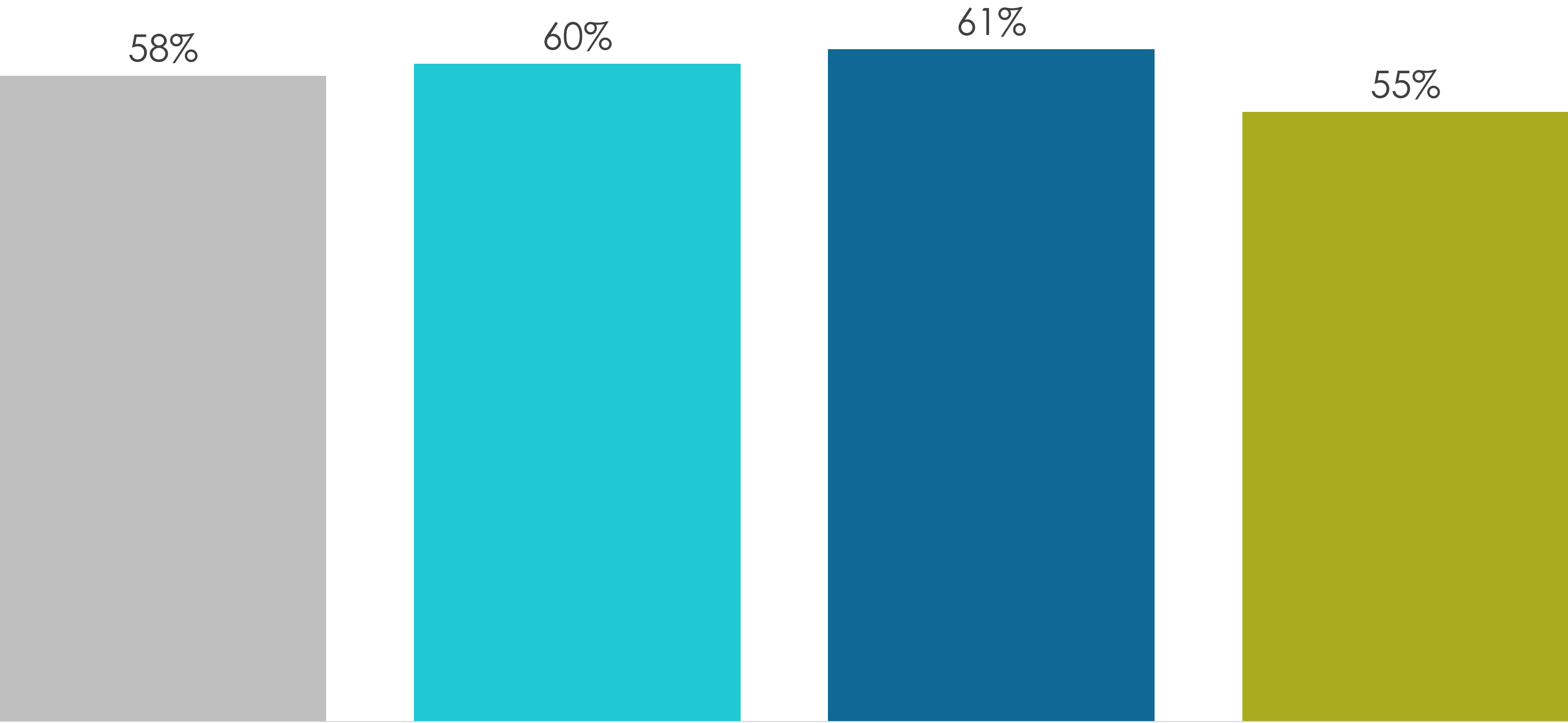
■ Male ■ Female

A crowd of people is seen from behind, holding up numerous small American flags on sticks. The scene is set at dusk or dawn, with a dark, blue-tinted sky and silhouettes of trees in the background. The overall mood is patriotic and celebratory. The text "COVID-19 Hot Topics" is overlaid in white, sans-serif font in the center-right of the image.

# COVID-19 Hot Topics

More than half (58%) of respondents have experienced an increased level of concern about COVID-19 based on the significant rise in the number of cases reported in recent weeks.

More concerned about COVID-19 due to rise in cases recently

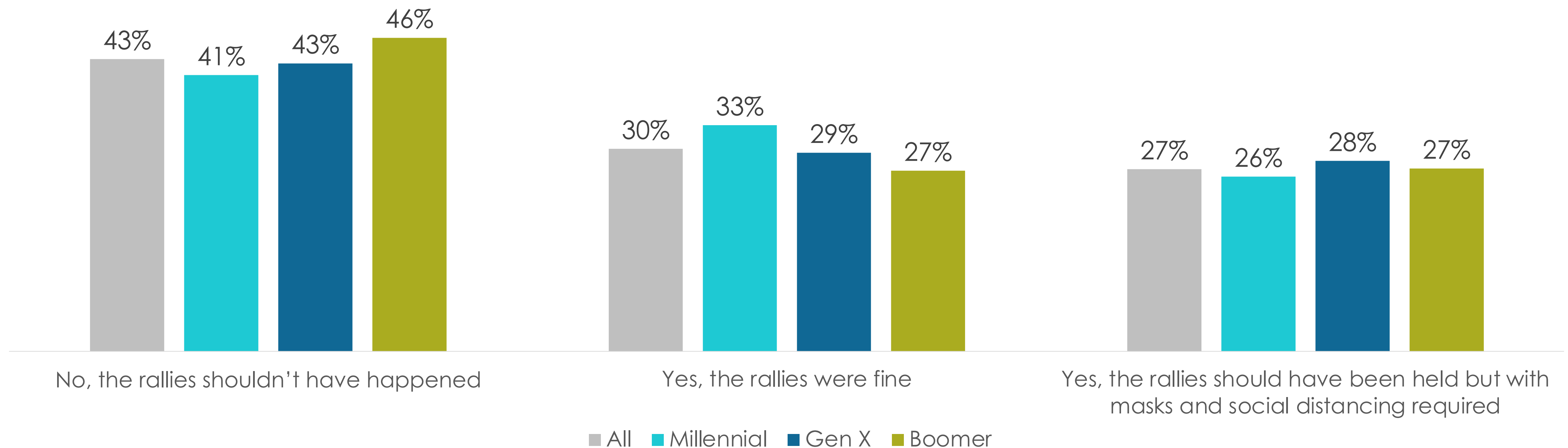


■ All ■ Millennial ■ Gen X ■ Boomer

How much has your concern about COVID-19 increased due to the significant rise in cases in recent weeks?

COVID concerns are reflected in people's opinion of President Trump's large rallies. Only 30% of respondents were pleased with the way they were held. 43% feel they should not have been held at all and 27% feel greater precautions were in order.

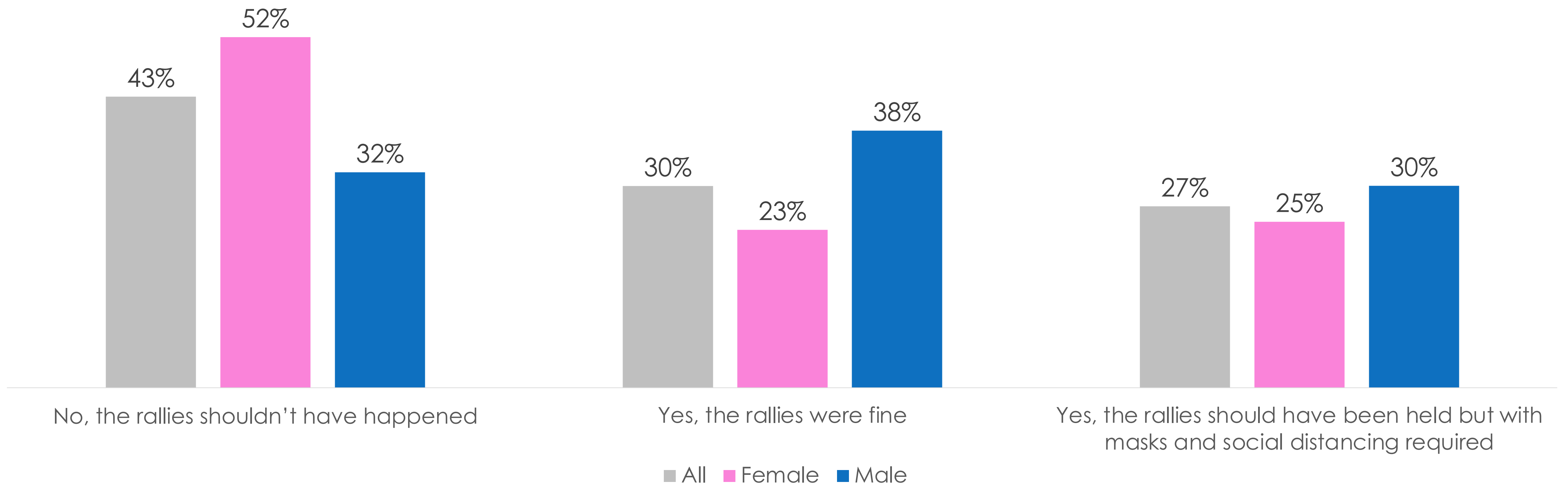
Was it right for President Trump to have rallies without masks or social distancing



Do you think it was right for President Trump to conduct political rallies this week where masks weren't required and social distancing wasn't practiced?

Women (52%) are much more likely to think the rallies should not have occurred than men (32%).

Was it right for President Trump to have rallies without masks or social distancing

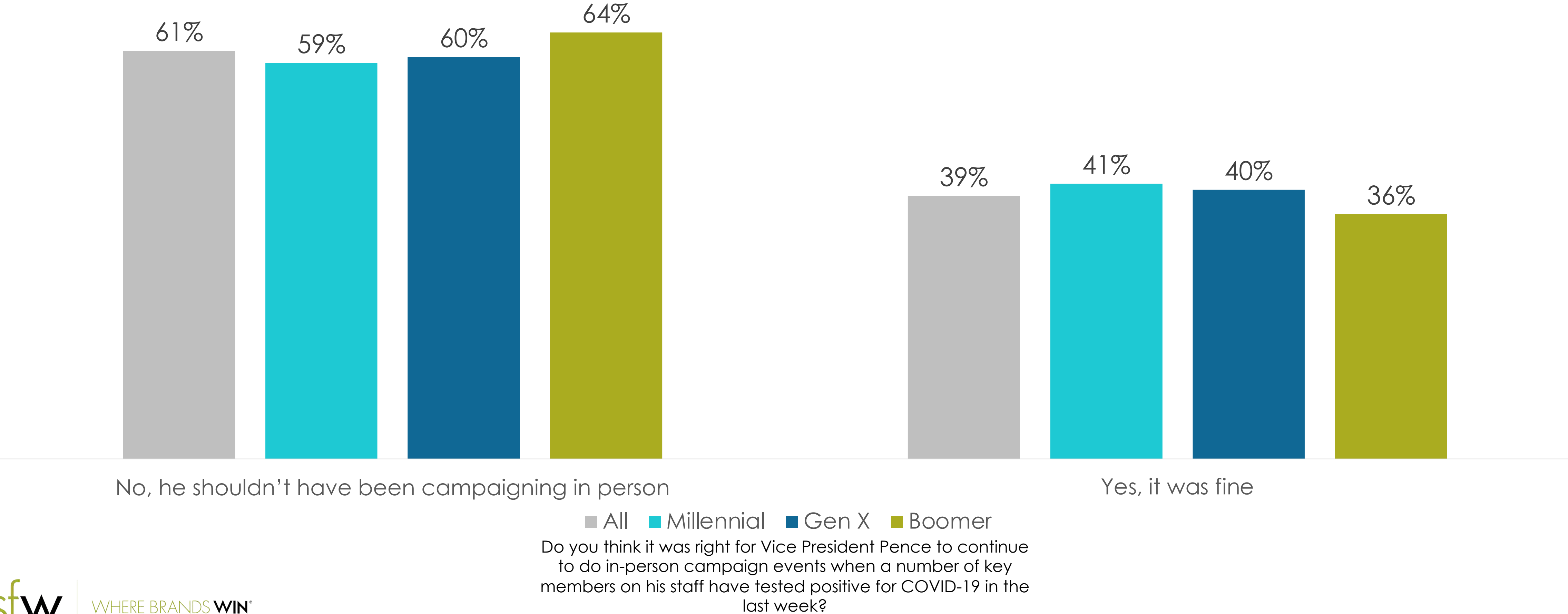


Do you think it was right for President Trump to conduct political rallies this week where masks weren't required and social distancing wasn't practiced?



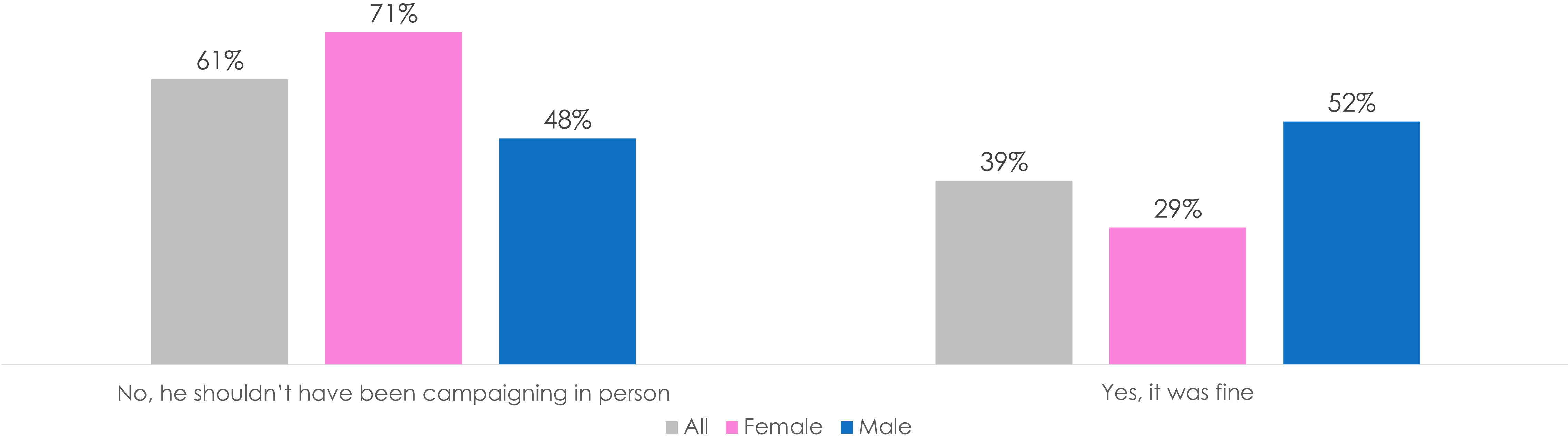
A similar concern about COVID is reflected in the 61% of respondents who felt it was inappropriate for Vice President Pence to continue making public appearances after key members of his staff were diagnosed with COVID-19.

Should Vice President Pence have campaigned in-person after staff reported having COVID-19



Women continue to demonstrate a more conservative nature than men. Nearly three-quarters (71%) feel Vice President Pence should have stopped in-person campaigning while fewer than half (48%) of men feel similarly.

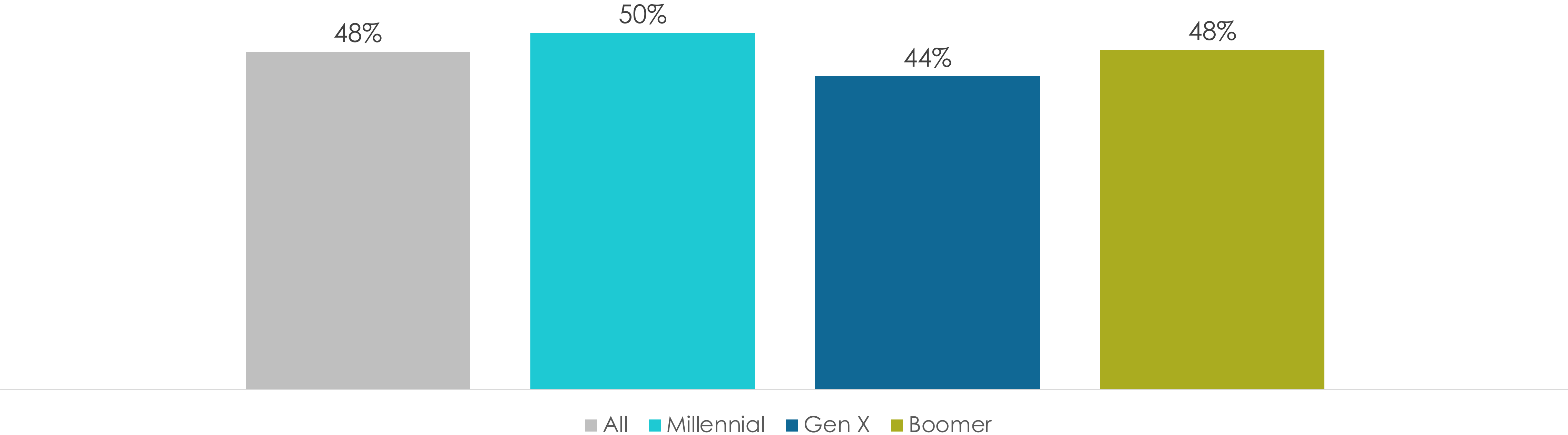
Should Vice President Pence have campaigned in-person after his staff reported having COVID-19



Do you think it was right for Vice President Pence to continue to do in-person campaign events when a number of key members on his staff have tested positive for COVID-19 in the last week?

Nearly half (48%) of respondents feel it is likely that state and local officials will begin shutting communities down after the election.

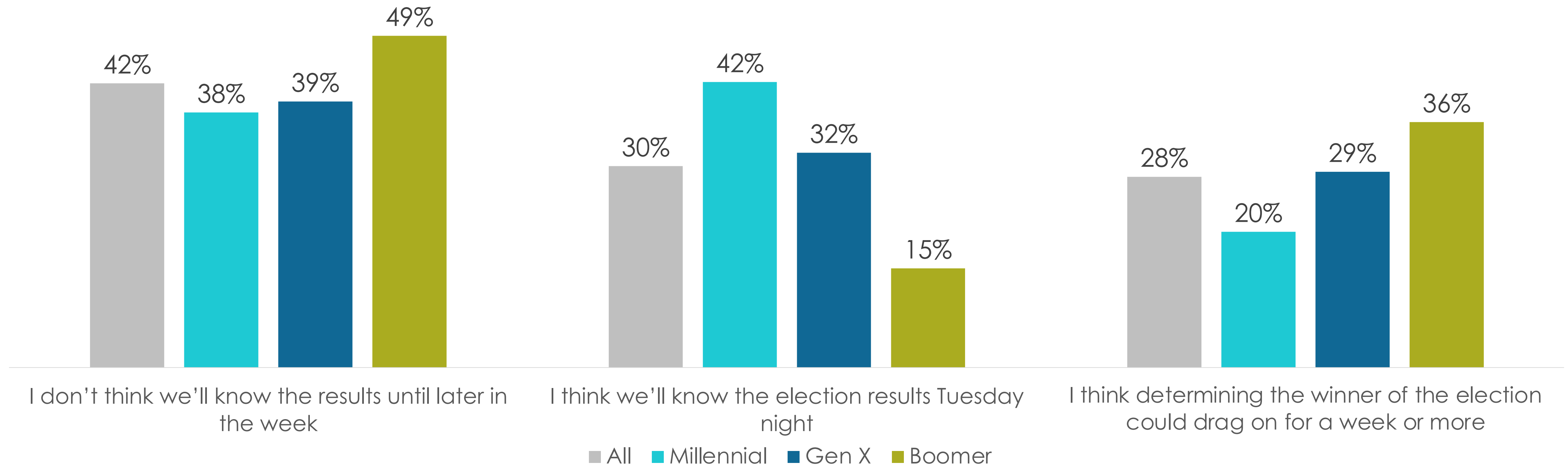
Those who find it likely that state officials will start closing communities back down after election



How likely do you think it is that local and state officials may begin closing communities back down after the election?

Voters are not anticipating a quick resolution to the election. Nearly as many think determining a winner could take a week or more (28%) as believe will know the winner election night (30%).

Thoughts on when we'll know the election winner



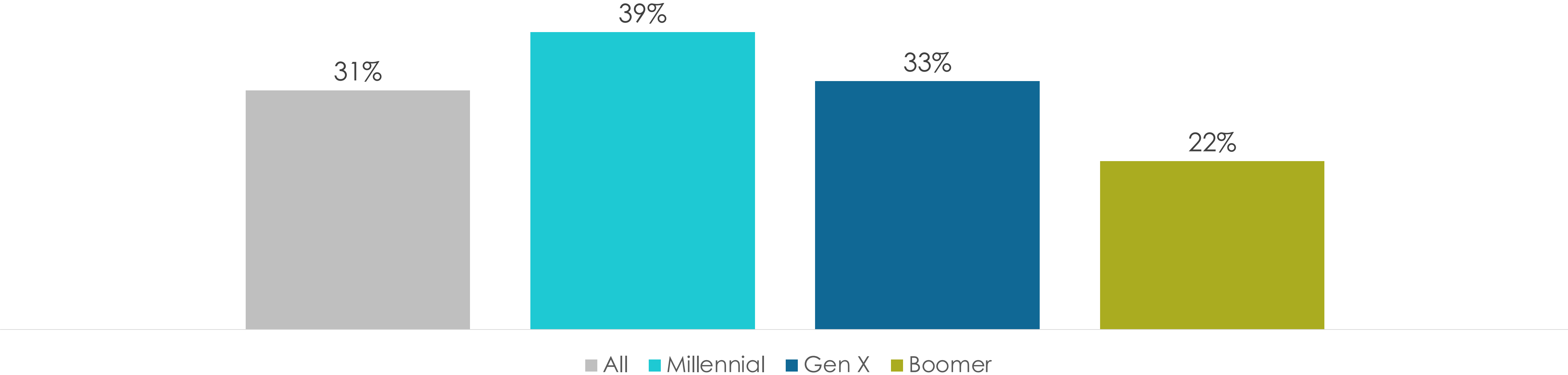
Do you think we'll know the winner of the election next Tuesday night or will it drag out?

A person wearing a teal cable-knit sweater is sitting at a wooden desk. They are using a silver laptop with their left hand on the keyboard and holding a black smartphone in their right hand. On the desk, there is a white coffee cup on a saucer, a small Christmas tree with lights, and a gift box wrapped in white paper with a black ribbon. The background is softly blurred, showing a patterned cushion and a lamp. The overall atmosphere is cozy and festive.

# Prime Day and Holiday Shopping

There was very little discussion on the success of Prime Day in the media this year, which may not be surprising as only 31% of respondents report having participated.

Those who participated in Prime Day this year

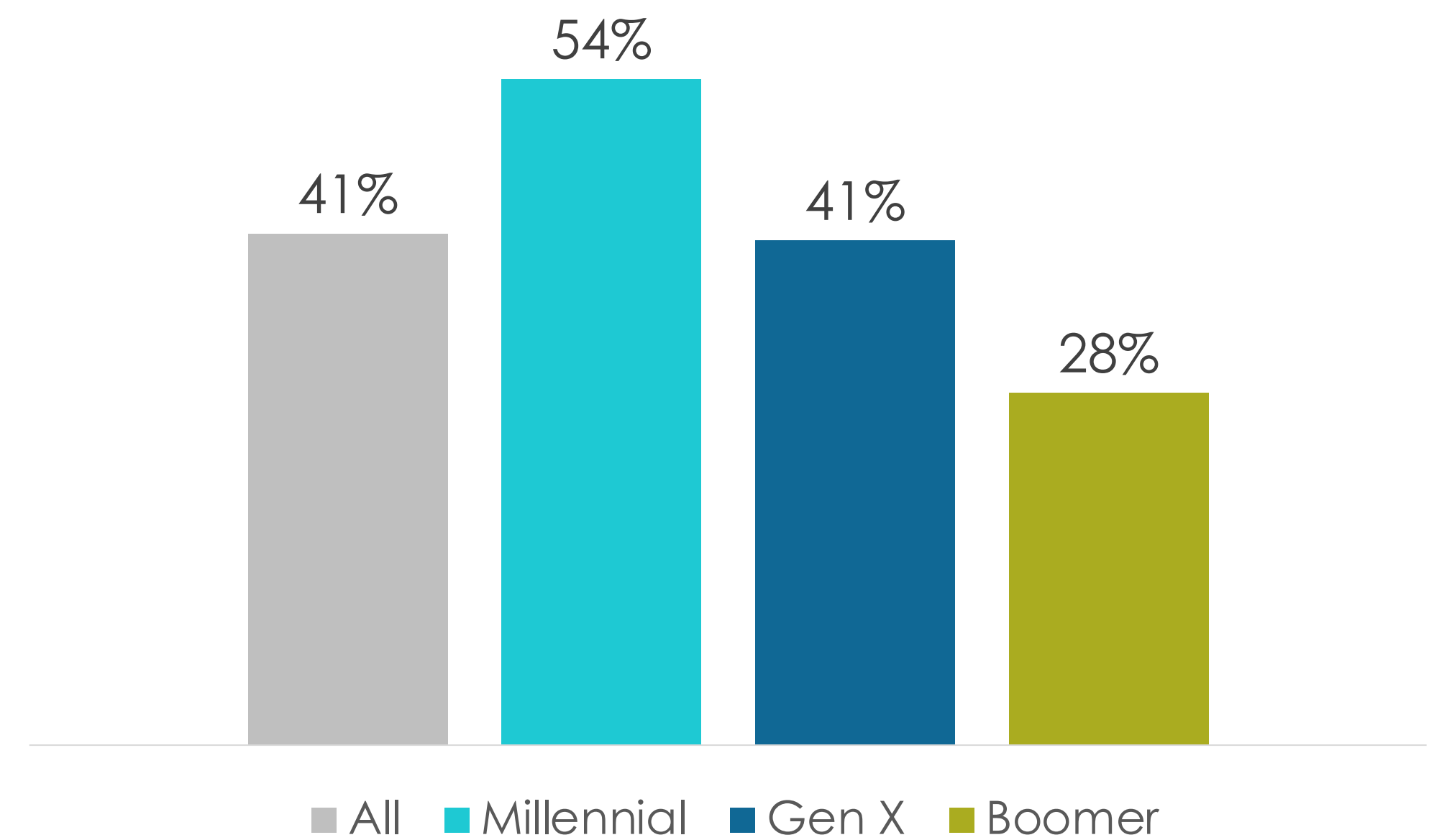


Did you participate in Prime Day this year?



The 31% participation rate does not compare favorably with the fact that 41% of respondents report having previously participated in a Prime Day.

Those who participated in Prime Day in previous years

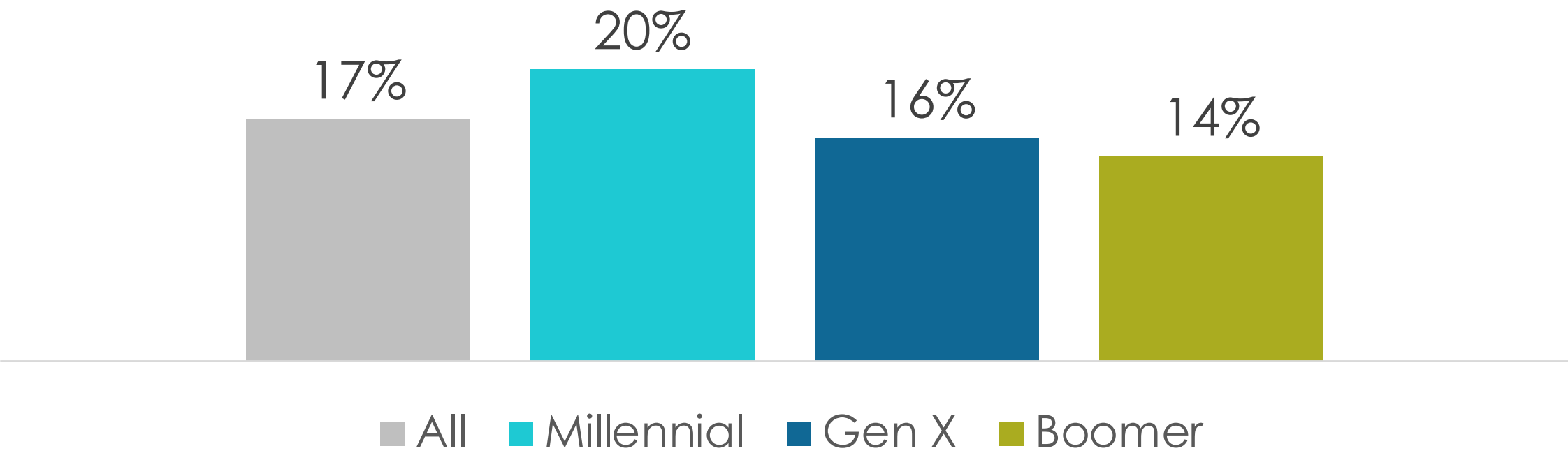
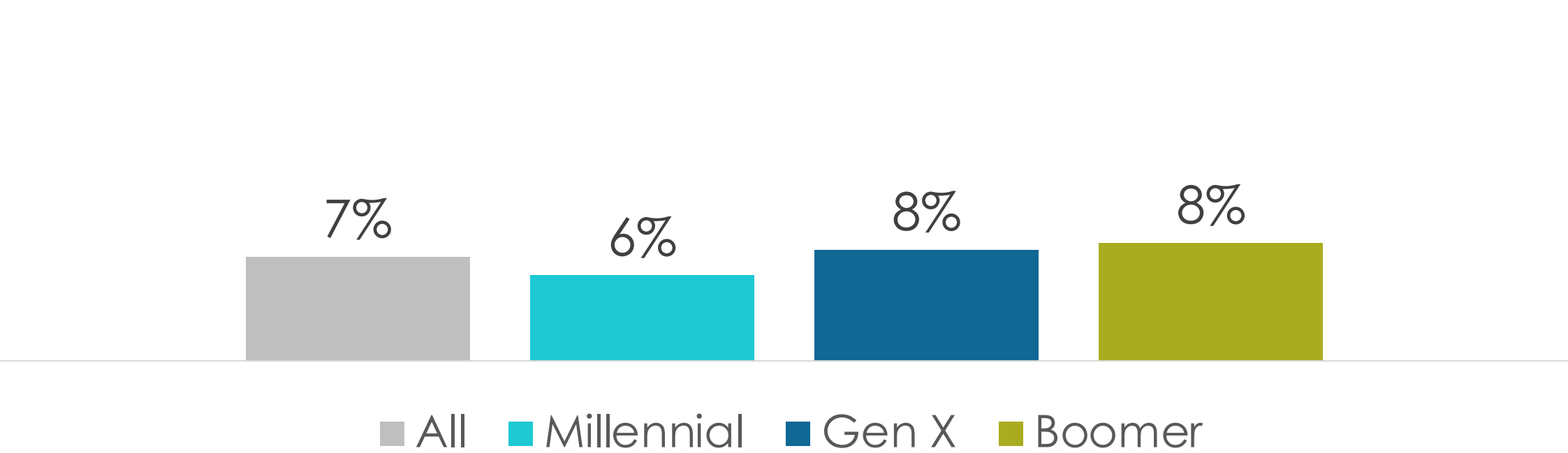


Have you participated in previous Prime Days?

The lower participation resulted from 17% who had participated previously but did not do so this year. Only 7% report being first time Prime Day participants.

Those who shopped Prime Day for the first time this year

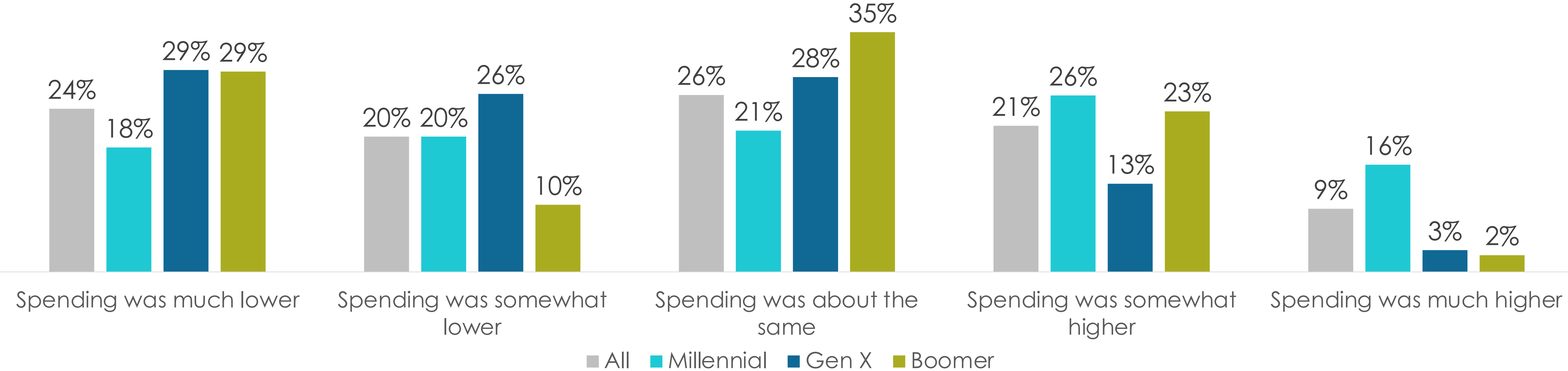
Those who shopped Prime Day previous years, but not this year





Prime Day spending this year was significantly lower for nearly one-quarter (24%) of respondents and significantly higher for only 9%.

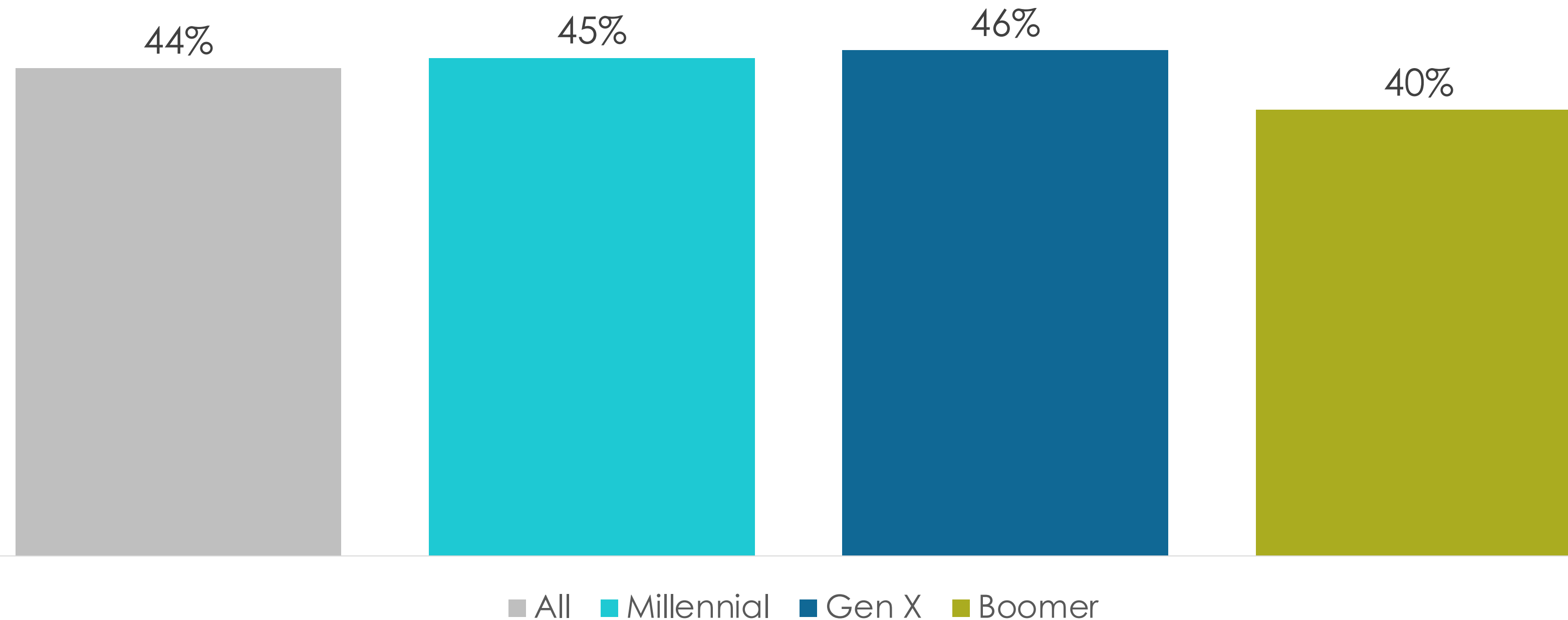
Prime Day spending compared to years prior



How did your Prime Day spending compare to prior years?

The closer proximity to the holidays (October vs. July) did result in nearly half (44%) of Prime Day spending being holiday related.

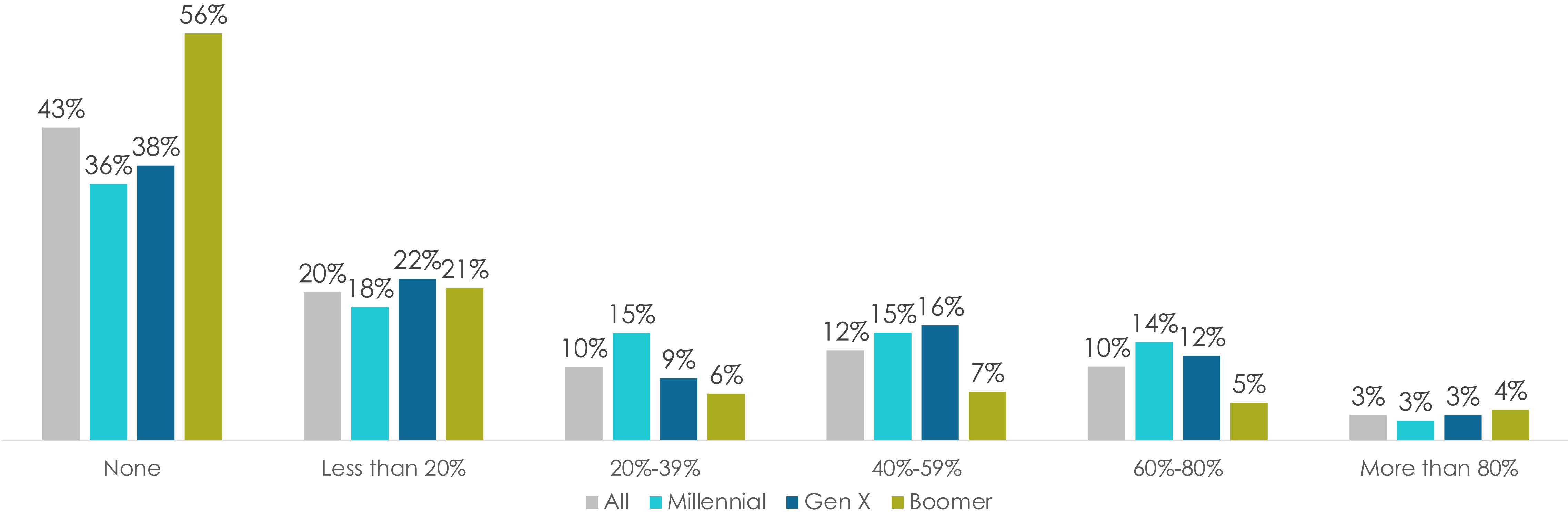
% Of Prime Day shopping: holiday gifts



What % of your Prime Day shopping was Holiday gifts vs. regular shopping for you and/or your family? Total must equal 100%

The holiday spend on Prime Day does not suggest that holiday shopping is well underway. 43% of respondents, including 56% of Boomers, have yet to begin their holiday shopping and only 25% have purchased more than 40% of their gifts.

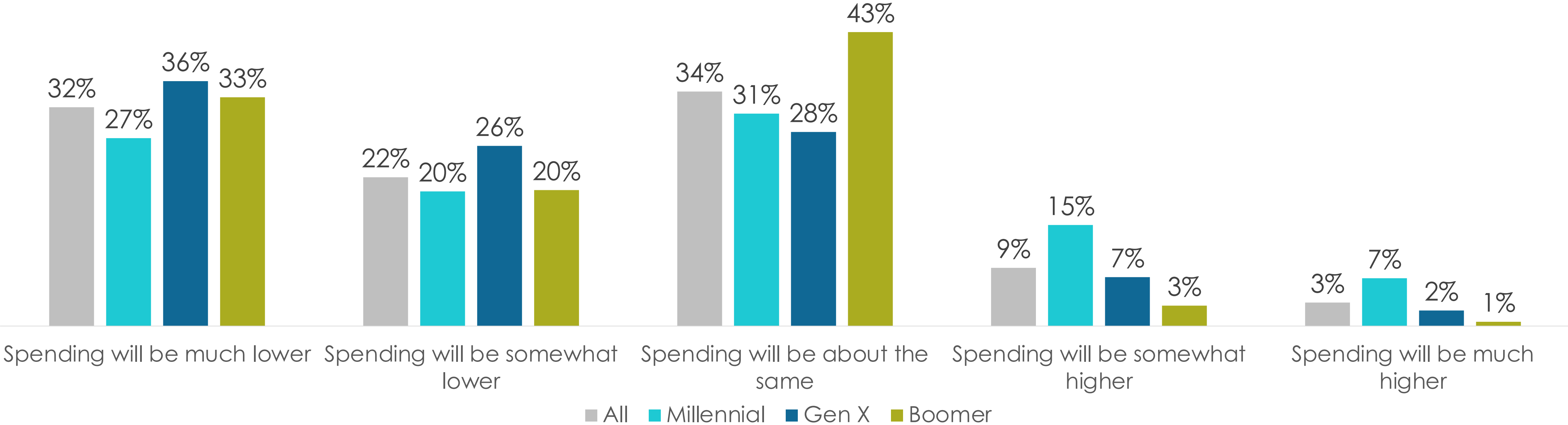
% of holiday shopping completed so far



How much of your Holiday shopping have you completed so far?

In aggregate, respondents expect their holiday spending to be down. 54% expect to spend less than in recent years while only 12% expect to spend more.

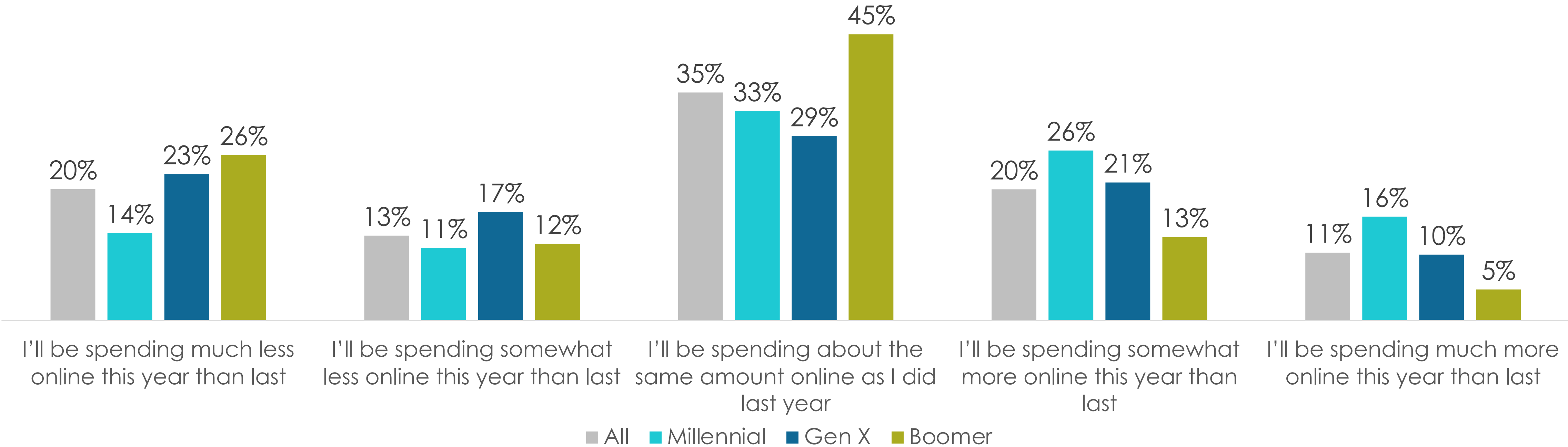
Total holiday spending this year vs. previous years



How do you think your total spending this Holiday season will compare to recent years?

Despite the projected decline in overall holiday spending, planned online purchases are relatively stable with 33% anticipating a decline in online spending while 31% expect an increase.

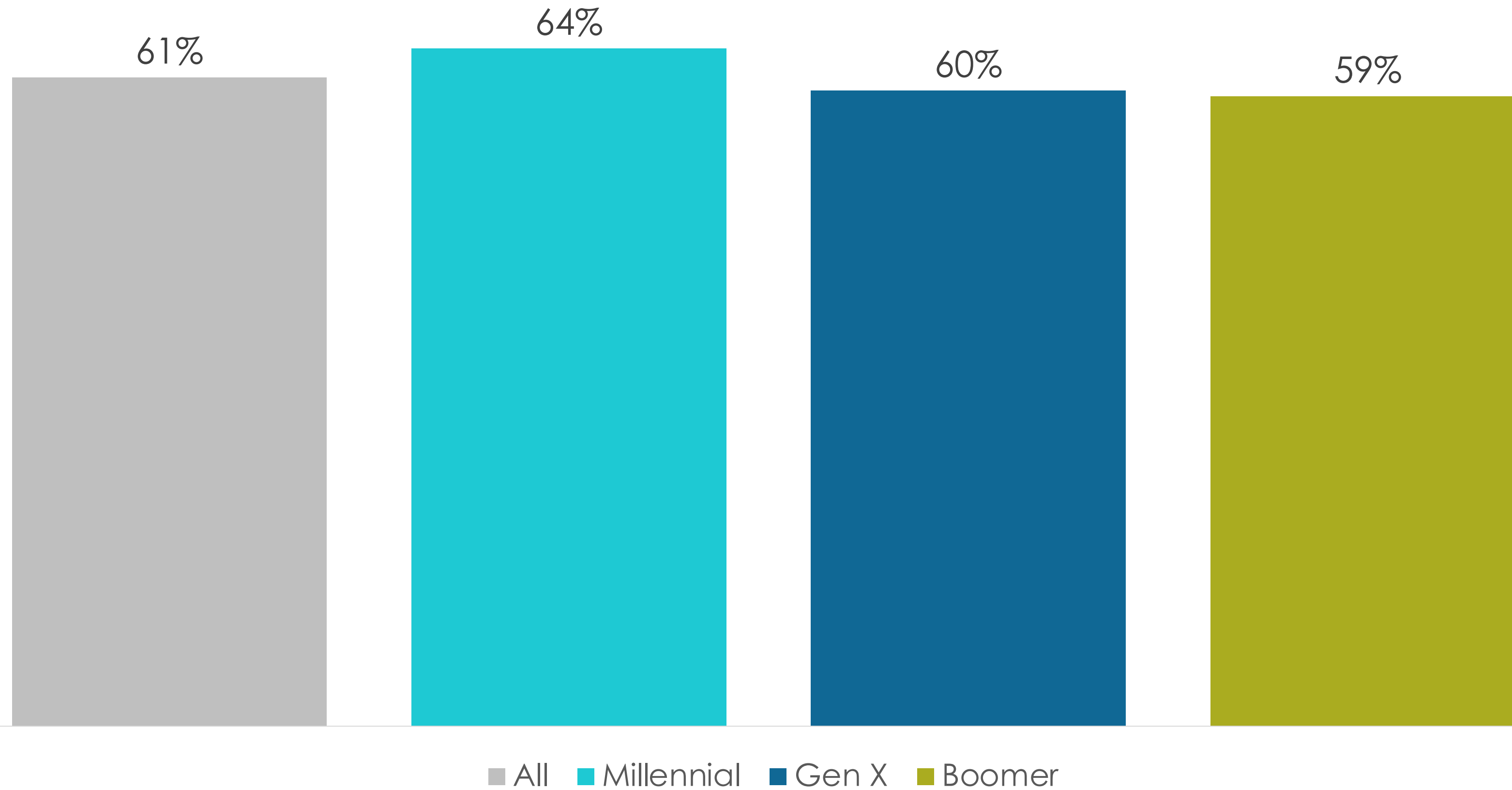
Holiday spending this year vs. last year



How will your online Holiday spending this year compare to last year?

In all, respondents expect that 61% of their holiday spending will occur online.

% Of holiday spending: online

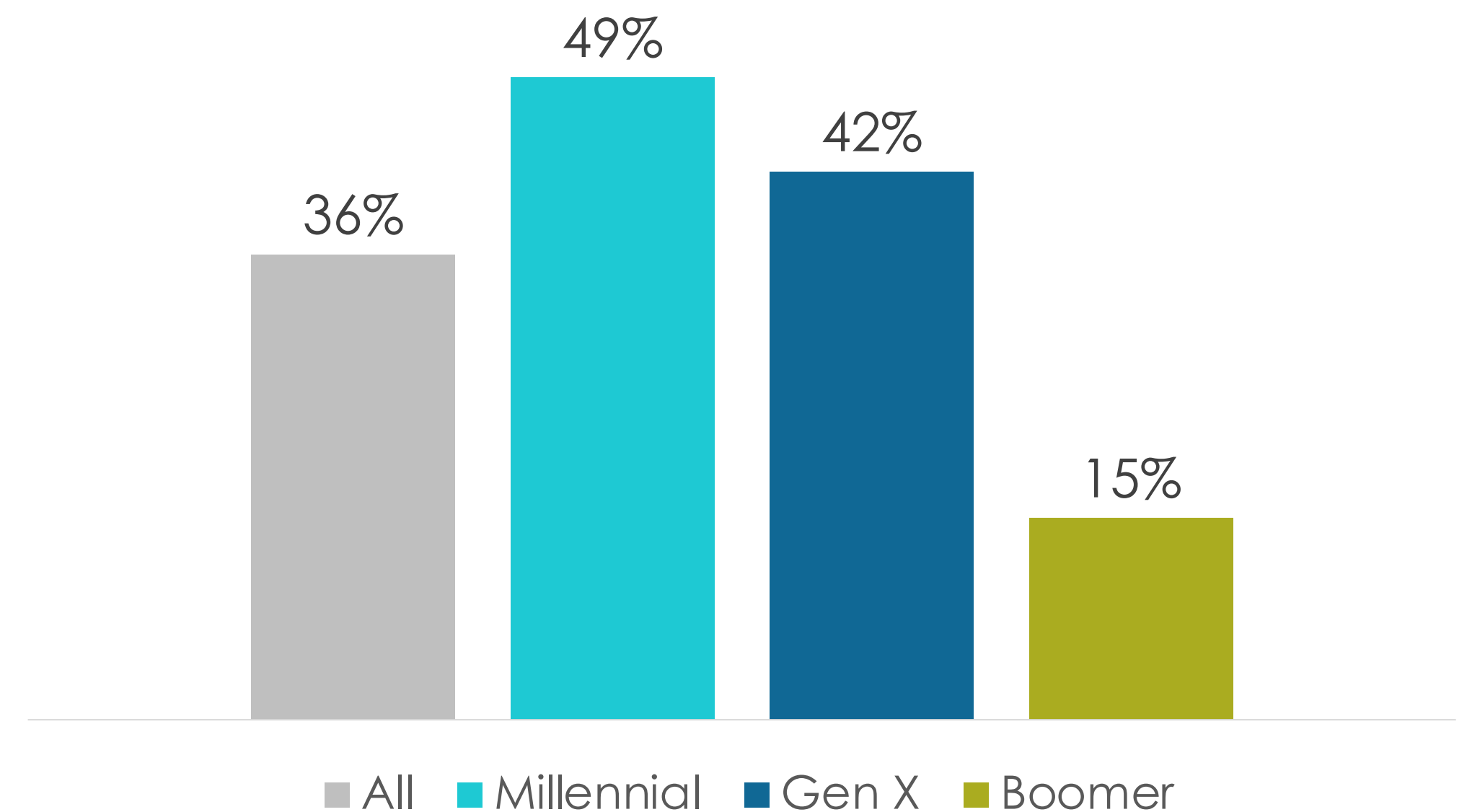


What % of your holiday spending do you think you'll do online vs in store. Total must equal 100%.



More than one-third (36%) of the sample is anticipating the ultimate availability of additional stimulus monies from the government in planning their holiday spending.

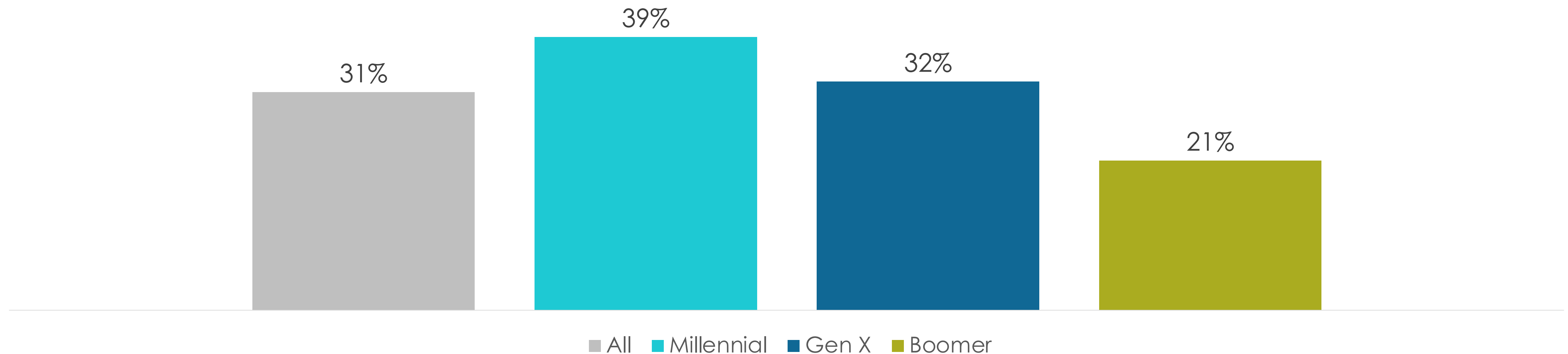
Those who are counting on a stimulus check as they're doing you're holiday shopping



Are you counting on a stimulus check as you're doing your Holiday shopping?

31% of respondents are at least somewhat confident that stimulus checks can be distributed in time for the holidays.

Those who find it likely both parties to agree on a 2nd stimulus package after the election to be sent in time for the holidays



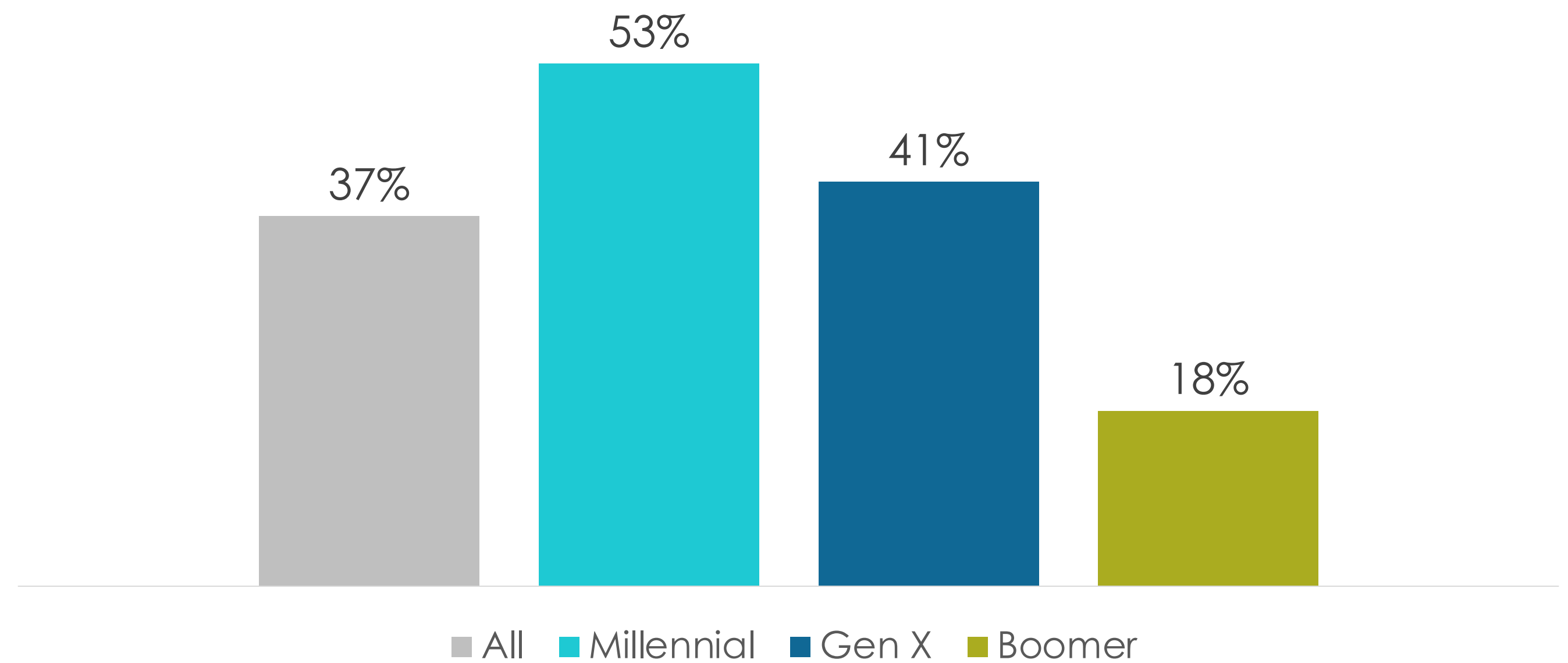
How likely do you think it is that after the election the two political parties will agree on a 2nd Stimulus Package in time to have checks sent in time for the Holidays?





The quick passage of a second stimulus package would result in more than one-third (37%) of respondents spending more on the holidays.

Those who are likely to spend more money for the holidays if a 2nd stimulus is passed soon



How likely are you to spend more money for the Holidays if a 2nd stimulus package is passed

# Summary

## COVID-19 Hot Topics

- More than half (58%) of respondents have experienced an increased level of concern about COVID-19 based on the significant rise in the number of cases reported in recent weeks.
- COVID concerns are reflected in people's opinion of President Trump's large rallies.
  - Only 30% of respondents were pleased with the way they were held. 43% feel they should not have been held at all and 27% feel greater precautions were in order.
  - Women (52%) are much more likely to think the rallies should not have occurred than men (32%).
- A similar concern about COVID-19 is reflected in the 61% of respondents who felt it was inappropriate for Vice President Pence to continue making public appearances after key members of his staff were diagnosed with COVID-19.
  - Women continue to demonstrate a more conservative nature than men. Nearly three-quarters (71%) feel Vice President Pence should have stopped in-person campaigning while fewer than half (48%) of men feel similarly.
- Nearly half (48%) of respondents feel it is likely that state and local officials will begin shutting communities down after the election.

## Summary - Continued

- On the question of the election, voters are not anticipating a quick resolution. Nearly as many (28%) think determining a winner could take a week or more as those believing we will know the winner election night (30%).

### Prime Day and Holiday Shopping

- There was very little discussion on the success of Prime Day in the media this year, which may not be surprising as only 31% of respondents report having participated.
- The 31% does not compare favorably with the fact that 41% of respondents report having previously participated in a Prime Day.
  - The lower participation resulted from 17% who had participated previously but did not do so this year. Only 7% of all respondents were first time Prime Day participants.
- Prime Day spending this year was significantly lower for nearly one-quarter (24%) of respondents but significantly higher for 9%.
- The closer proximity to the holidays (October vs. July) did result in nearly half (44%) of Prime Day spending being holiday-related.

## Summary - Continued

- The holiday spend on Prime Day does not suggest that holiday shopping is well underway.
  - 43% of respondents, including 56% of Boomers, have yet to begin their holiday shopping.
  - Only 25% have purchased more than 40% of their gifts.
- In aggregate, respondents expect their holiday spending to be down. 54% expect to spend less than in recent years, while only 12% expect to spend more.
- Despite the projected decline in overall holiday spending, planned online purchases are relatively stable, with 33% anticipating a decline in online spending compared to 31% expecting an increase.
- In all, respondents expect that 61% of their holiday spending will occur online.

### Stimulus Money and the Holidays

- More than one-third (36%) of the sample is anticipating the ultimate availability of additional stimulus monies from the government in planning their holiday spending.
- 31% of respondents are at least somewhat confident that stimulus checks can be distributed in time for the holidays.
- The quick passage of a second stimulus package would result in more than one-third (37%) of respondents spending more on the holidays.