



COVID-19 U.S. CONSUMER IMPACT TRACKING STUDY – WEEK 38

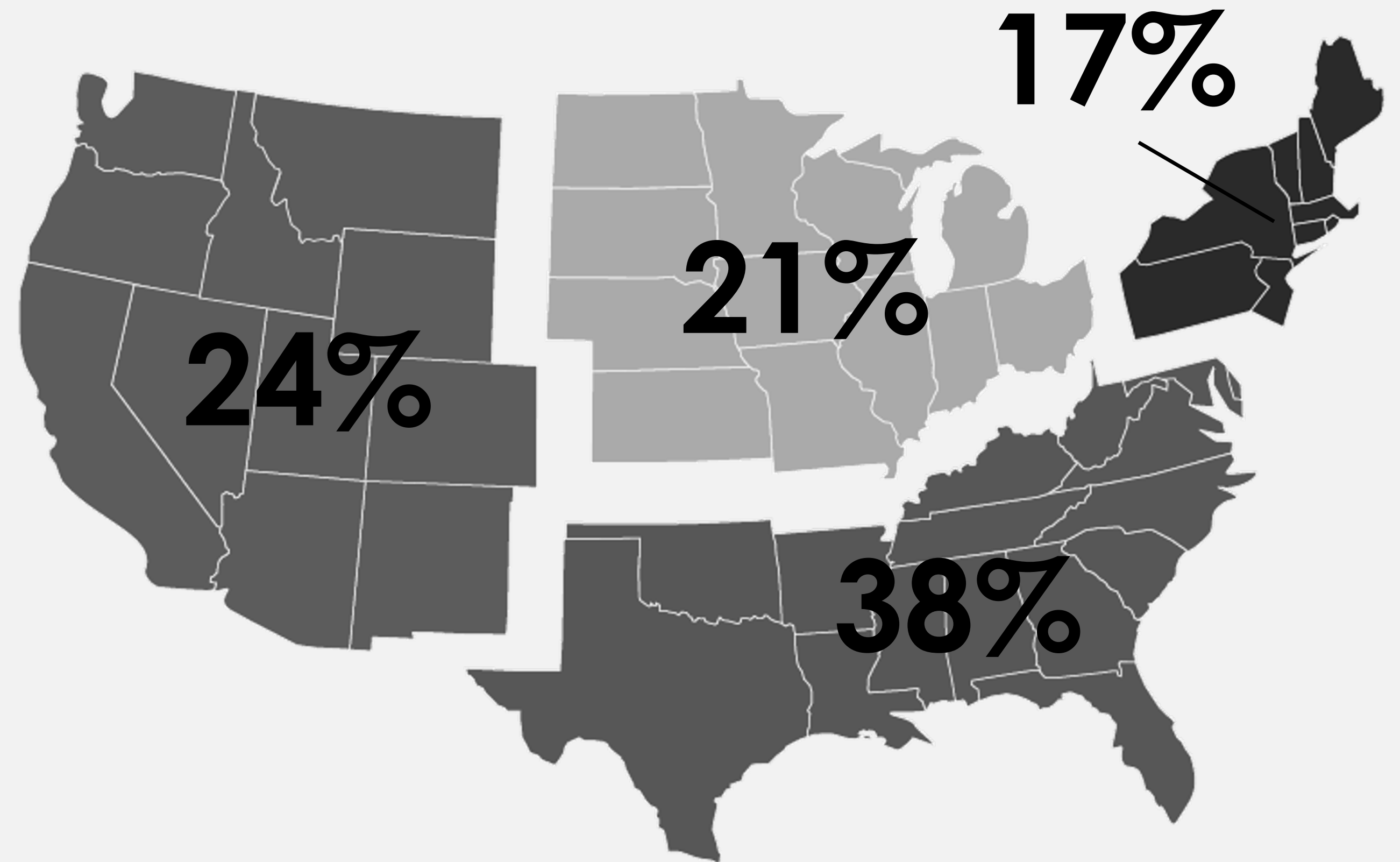
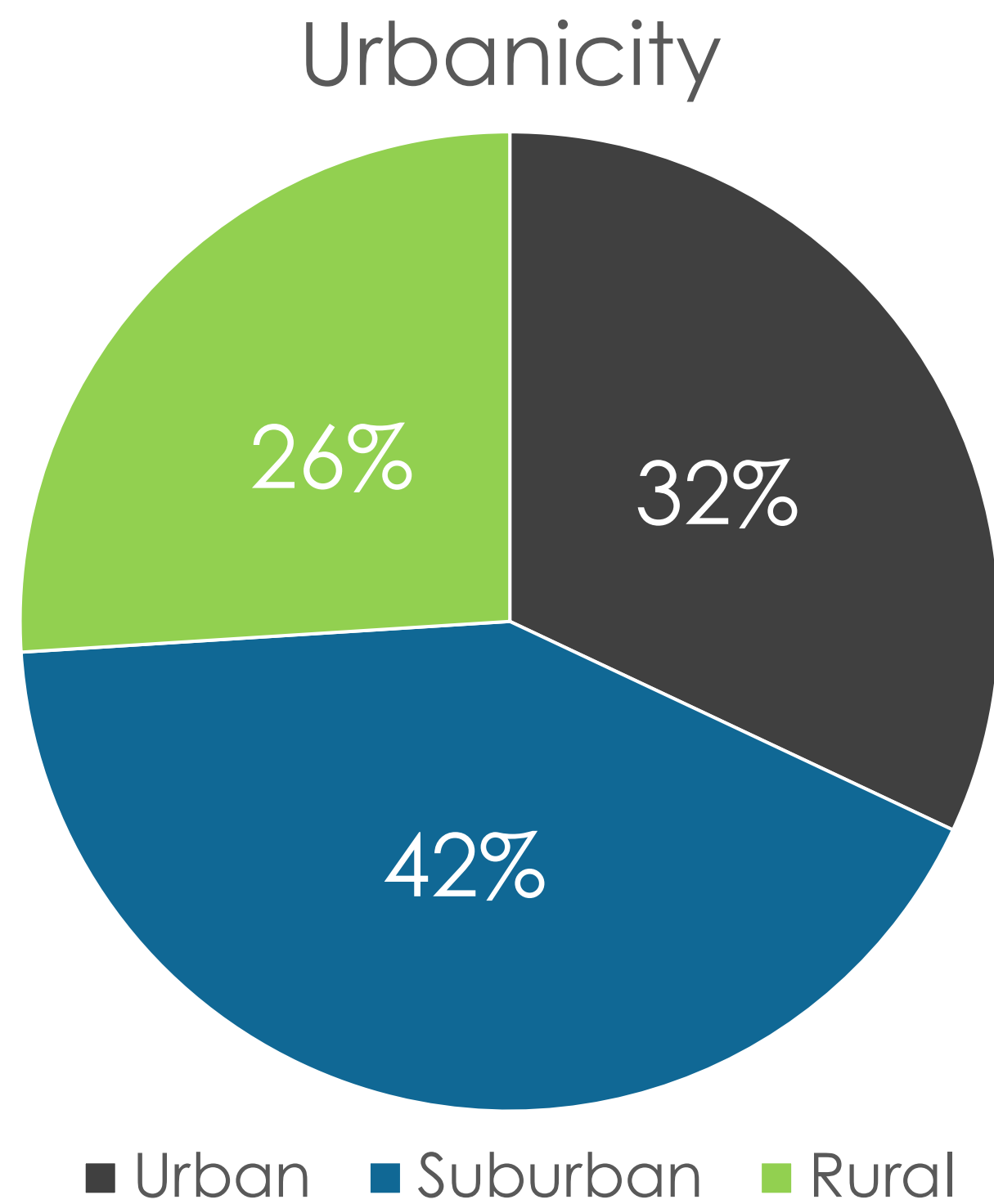
PRESENTED NOVEMBER 23, 2020

Methodology

- N = 687
- MOE = $\pm 3.74\%$
- Panel: General Population
- Collected: 11/19/20, 11/20/20

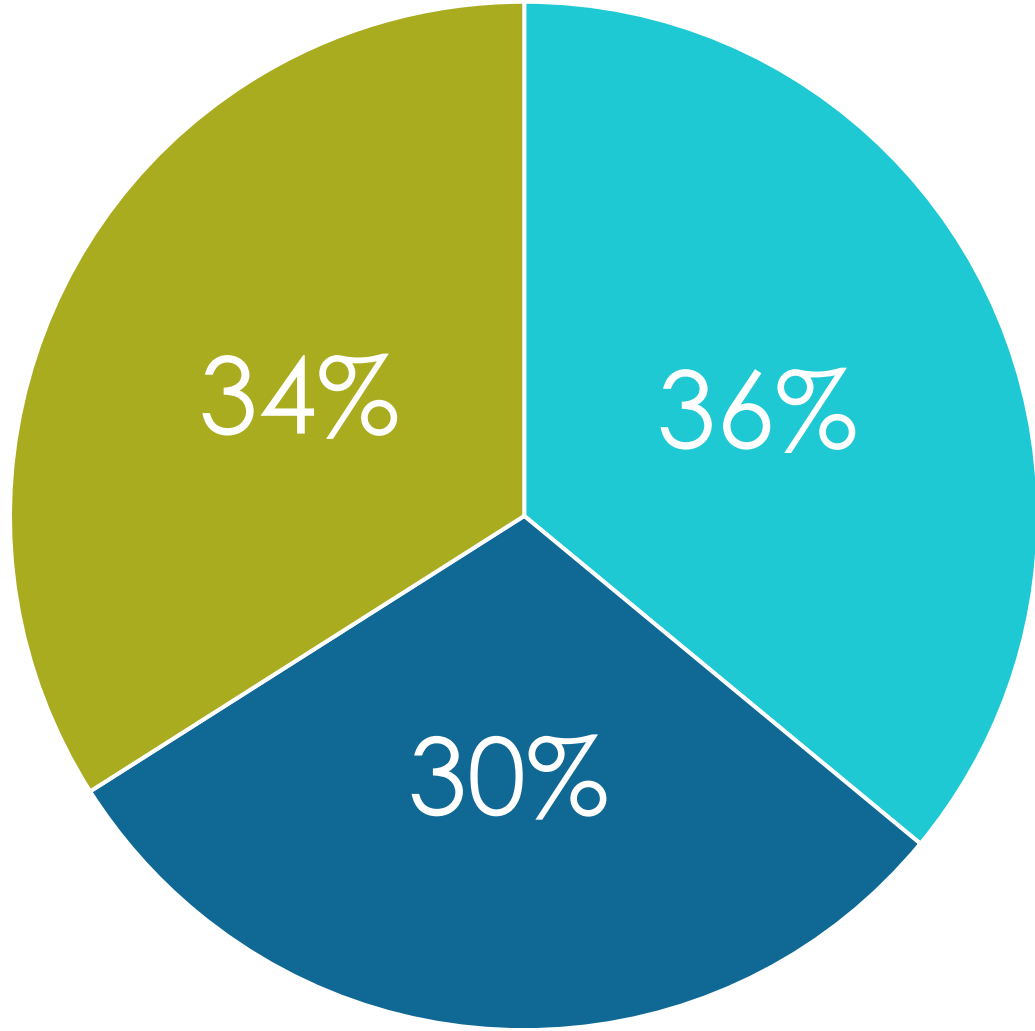


Panel Composition



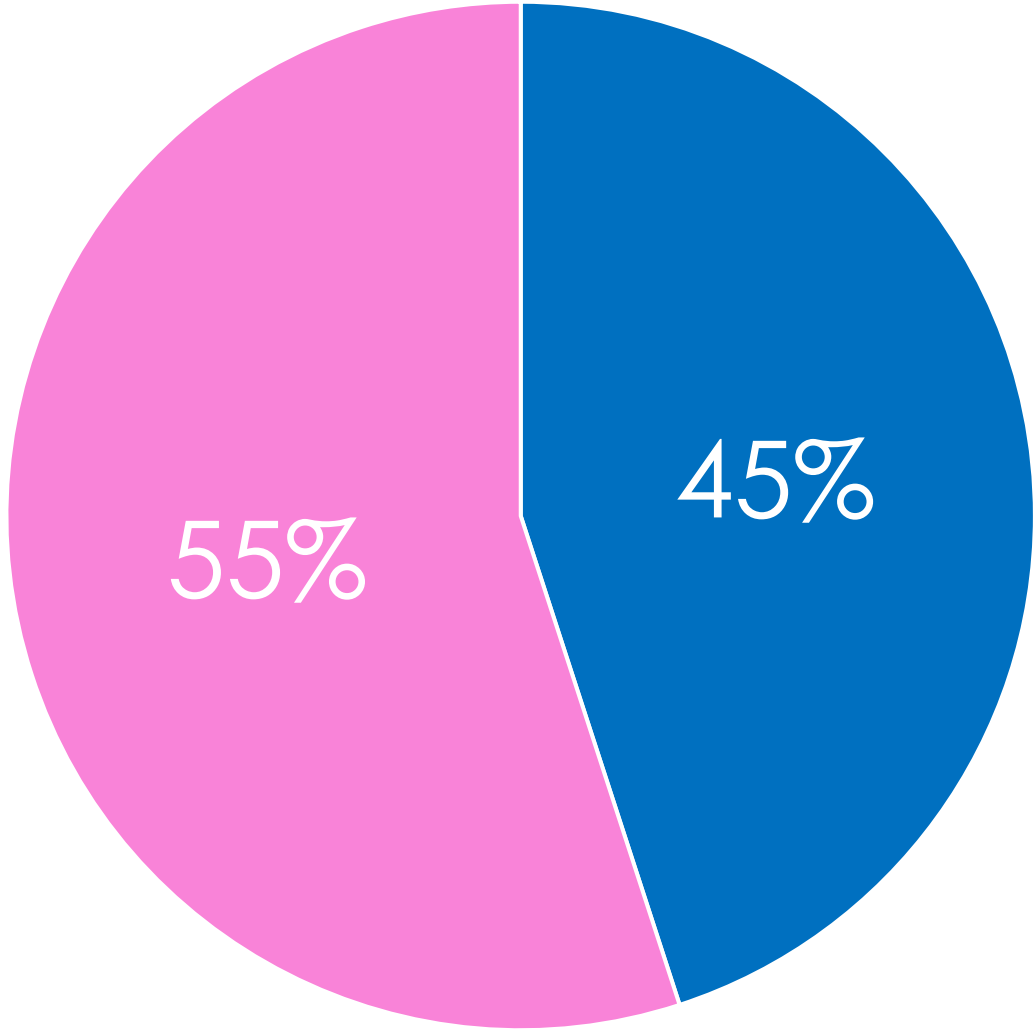


Generation



■ Millennial ■ Gen X ■ Boomer

Gender



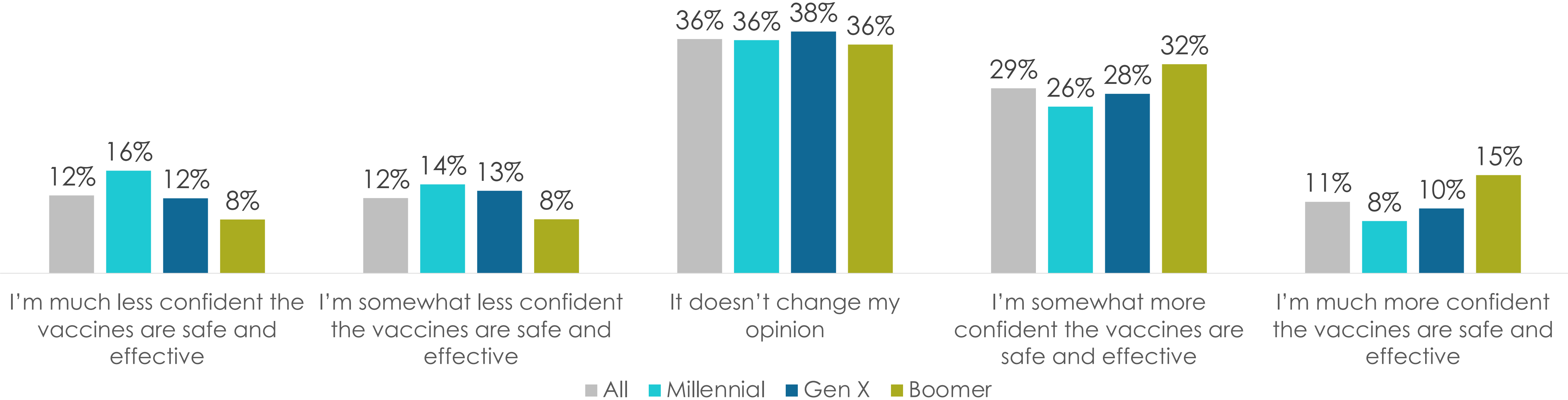
■ Male ■ Female

COVID-19 Hot Topics



This week's announcement by Moderna that they've developed a safe and highly effective COVID-19 vaccine has bolstered confidence in vaccines for 40% of respondents. Nearly one-quarter (24%), however, have had their confidence reduced.

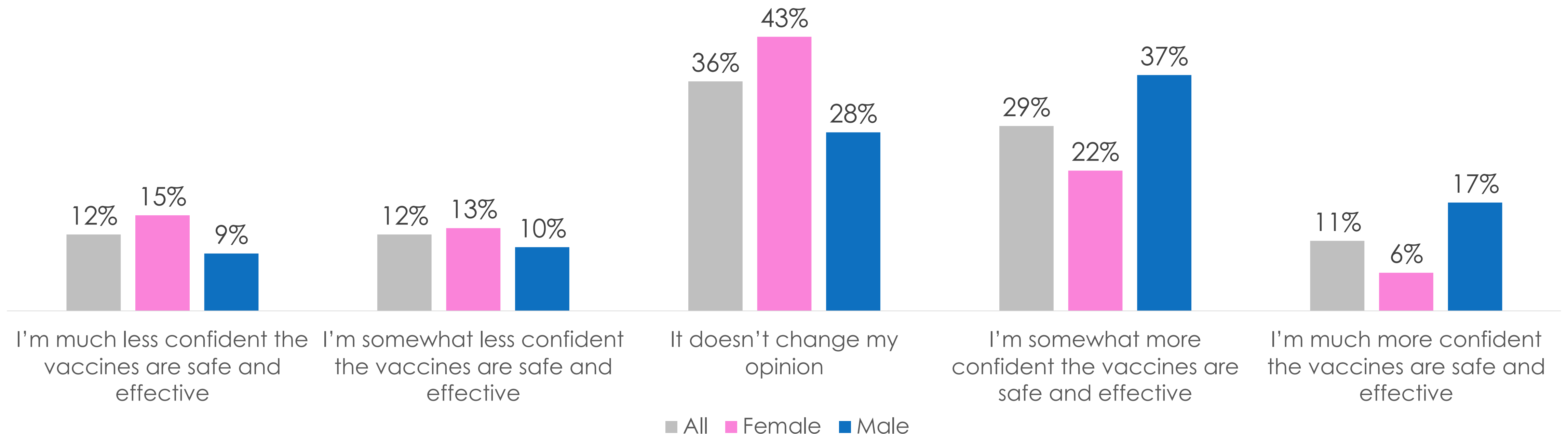
Impact of second vaccine on attitude about safety and efficacy



After last week's announcement that Pfizer has developed an effective COVID vaccine, Moderna announced they have also developed a vaccine that is over 90% effective. How does the presence of a second vaccine impact your attitude about the believability of the safety and effectivity of the vaccines?

Men (54%) were significantly more likely than women (28%) to experience an increase in confidence in the safety and efficacy of the vaccines.

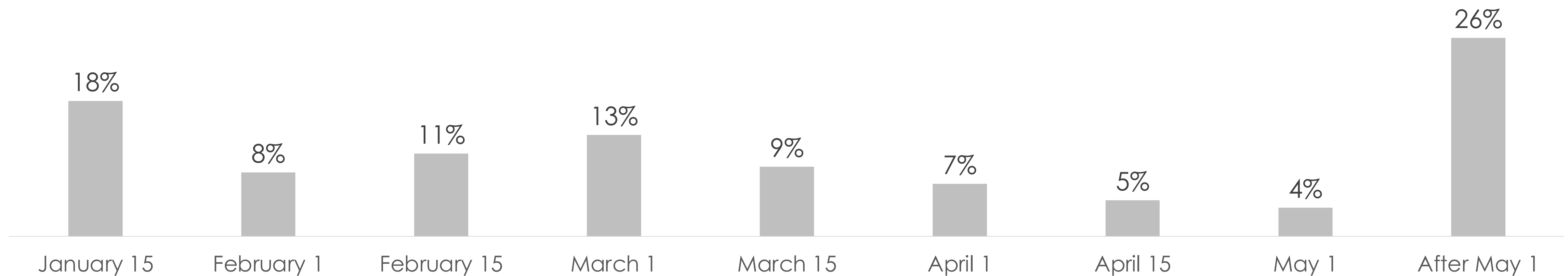
Impact of second vaccine on attitude about the believability



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People appear cognizant of the challenges associated with the mass production and distribution of the vaccines. More than one-third (35%) don't believe they'll have access until April 15th or later.

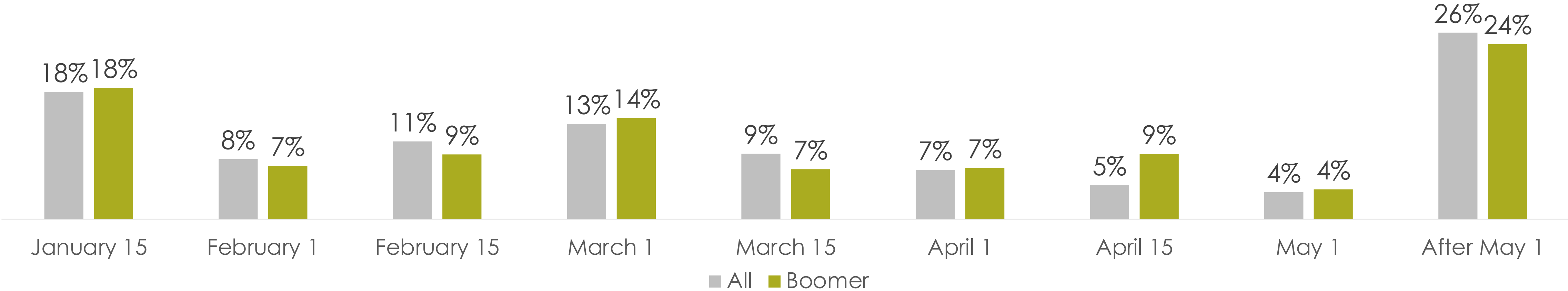
Expected date for vaccine to be available for the respondent



How soon do you think a vaccine could be available for you if you choose to get vaccinated?

Surprisingly, the higher risk Boomers don't see themselves as having access to the vaccine any sooner than the rest of the population.

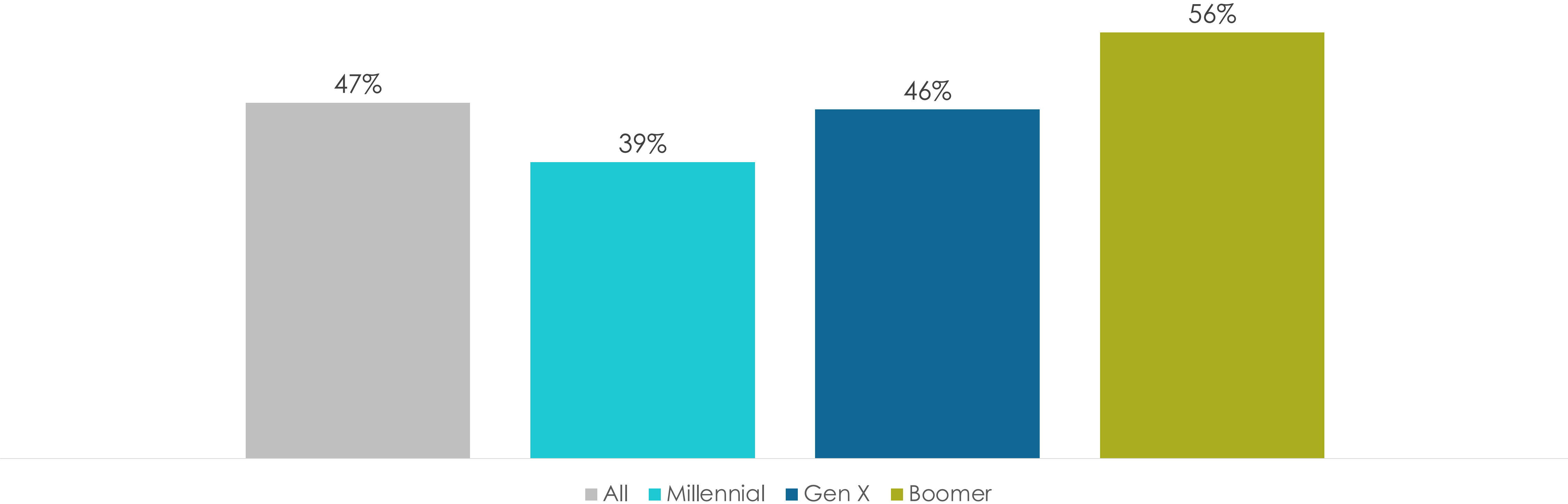
Expected date for vaccine to be available



How soon do you think a vaccine could be available for you if you choose to get vaccinated?

Despite the higher confidence level expressed, less than half of the respondents (47%) say they are likely or very likely to get the vaccine.

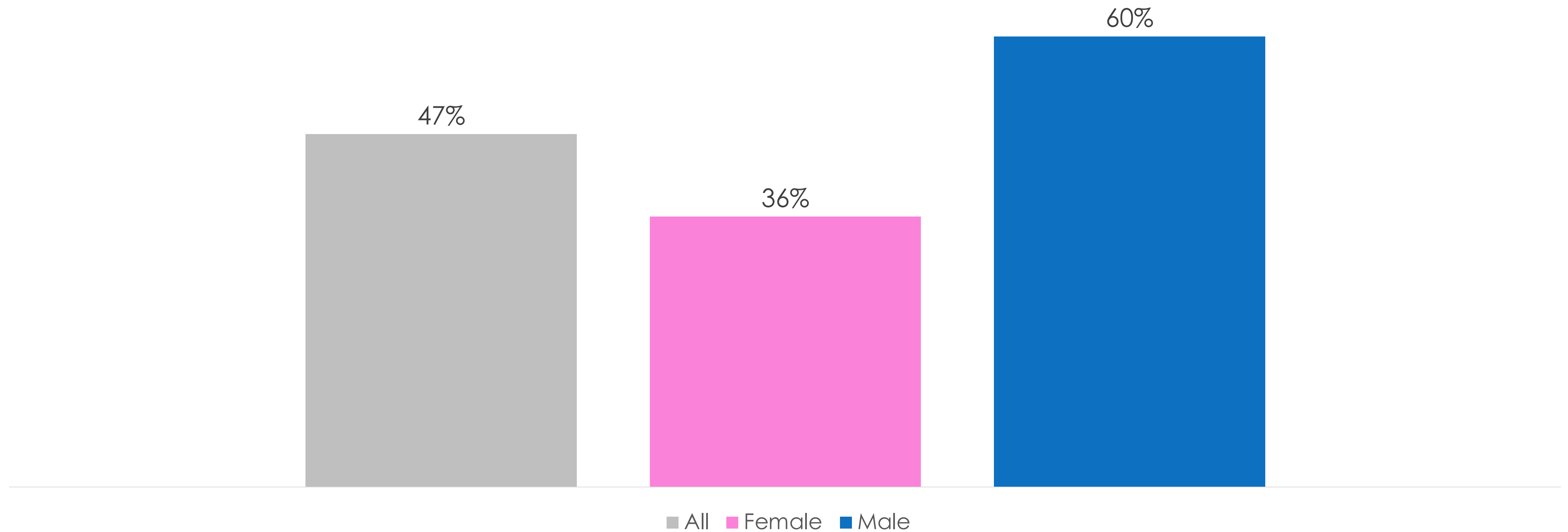
% Likely to get COVID-19 vaccine



How likely are you to get the COVID vaccine when it becomes available for you?

Women (36%) are significantly less likely to say they will get the vaccine than men (60%).

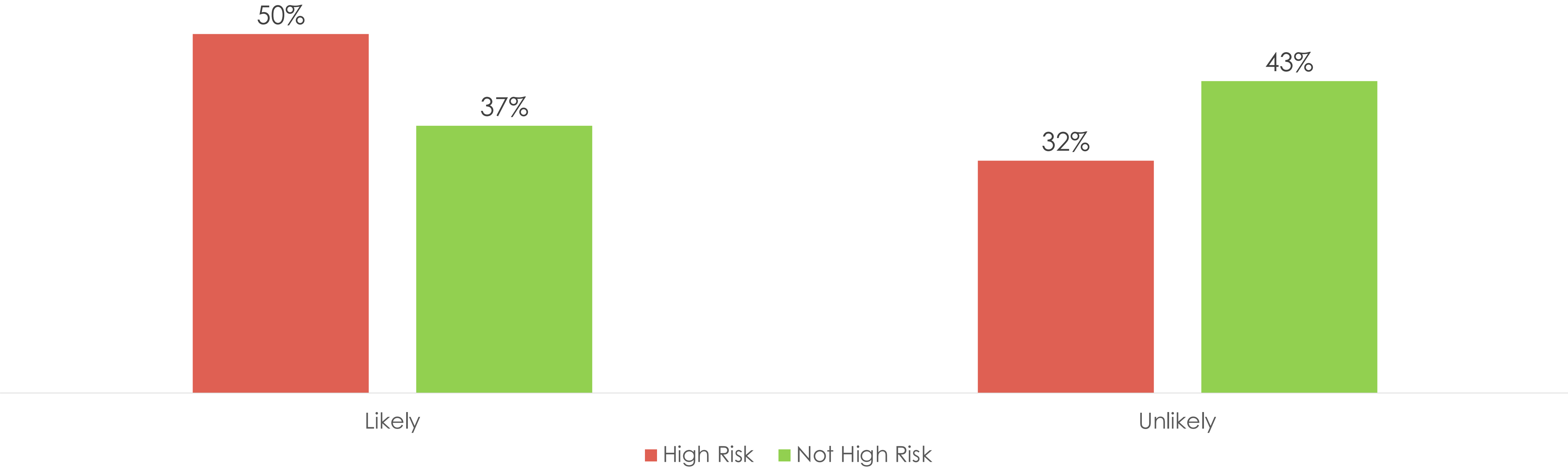
% Likely to get COVID-19 vaccine



How likely are you to get the COVID vaccine when it becomes available for you?

49% of the sample defined themselves as high risk based on their age and/or a preexisting condition. Only half of those people are likely or very likely to get the vaccine while nearly one-third (32%) are not likely to get the vaccine.

Likelihood of getting COVID-19 vaccine: High risk individuals

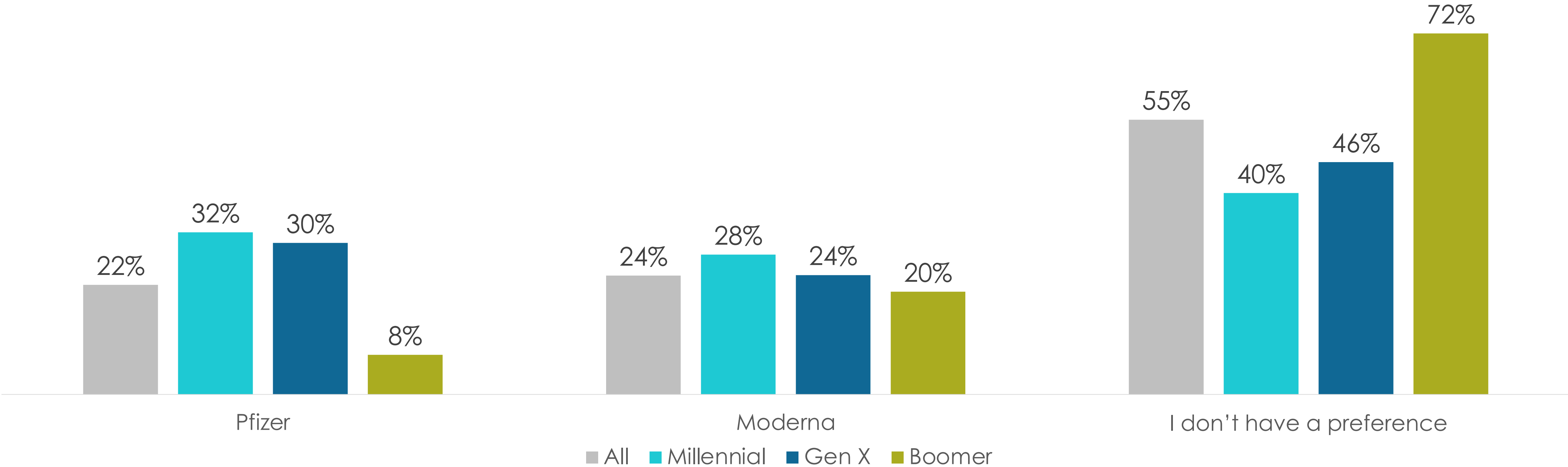


How likely are you to get the COVID vaccine when it becomes available for you?

Are you in what would be considered a high-risk group (health care professional, over 65, diabetic, overweight, heart disease, asthmatic, etc.) for COVID?

Among those planning to get the vaccine, the majority (55%) have no preference for which vaccine they receive.

Prefer Pfizer or Moderna vaccine

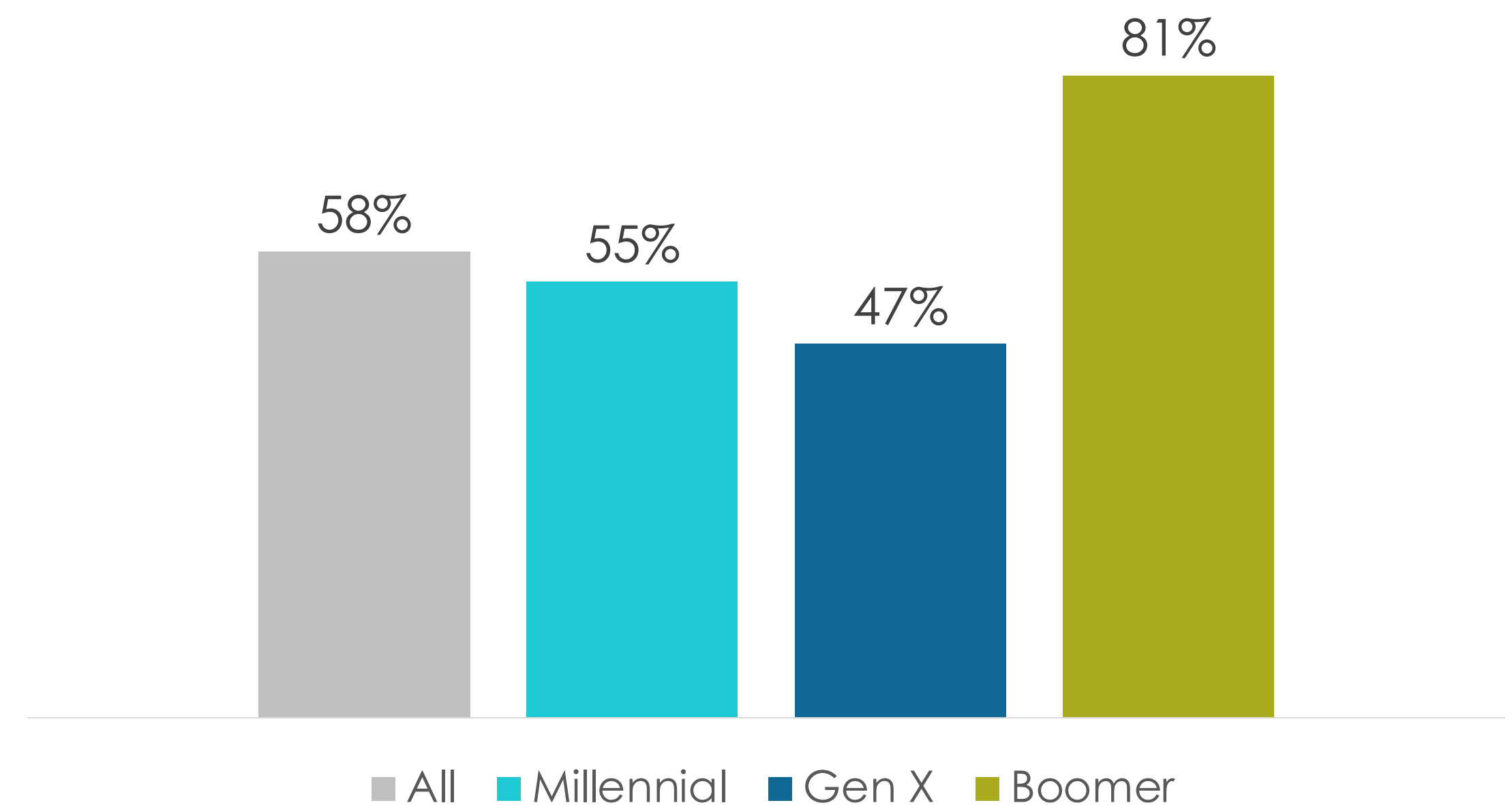


Based on what you know, do you prefer the Pfizer or the Moderna vaccine?



Among the 46% who do have a preference for either the Moderna or Pfizer vaccine, the majority (58%) will still get whichever vaccine is available to them first.

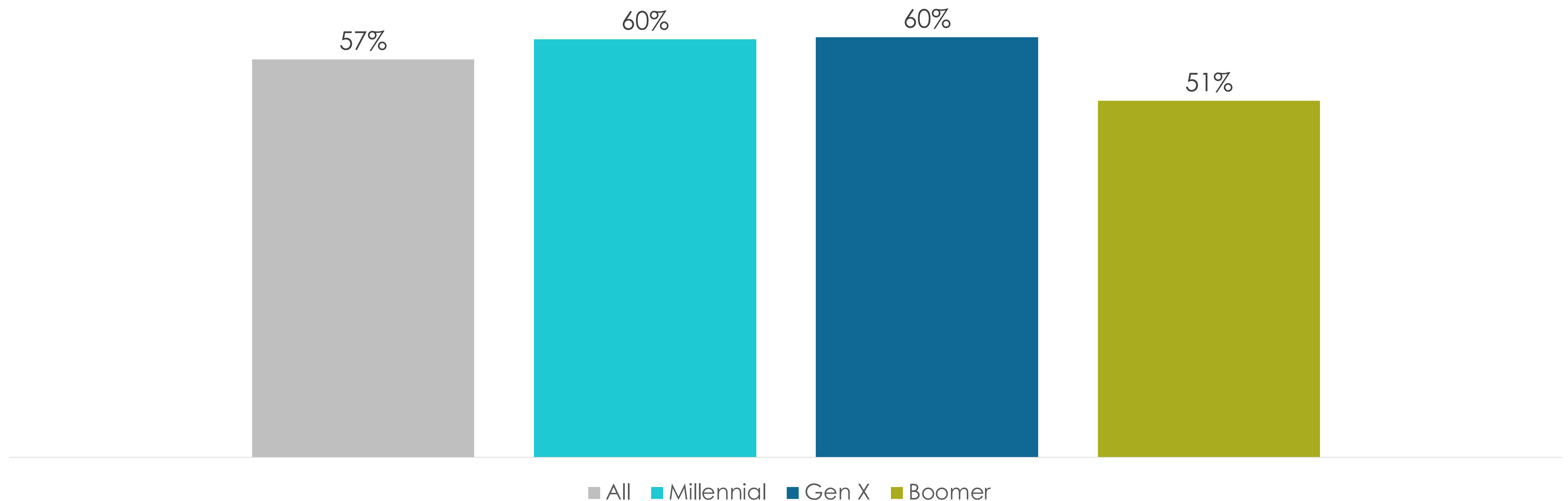
% Who would still get the vaccine if their preferred vaccine wasn't available



If the vaccine you'd prefer wasn't available, but the other vaccine was, would you get the vaccine you don't prefer or wait?

More than half (57%) of the respondents are concerned that the lack of cooperation between the Trump and Biden staffs could result in the delayed distribution of the vaccines.

% Who are concerned about delay in distribution of vaccines due to lack of cooperation between the Trump and Biden staffs



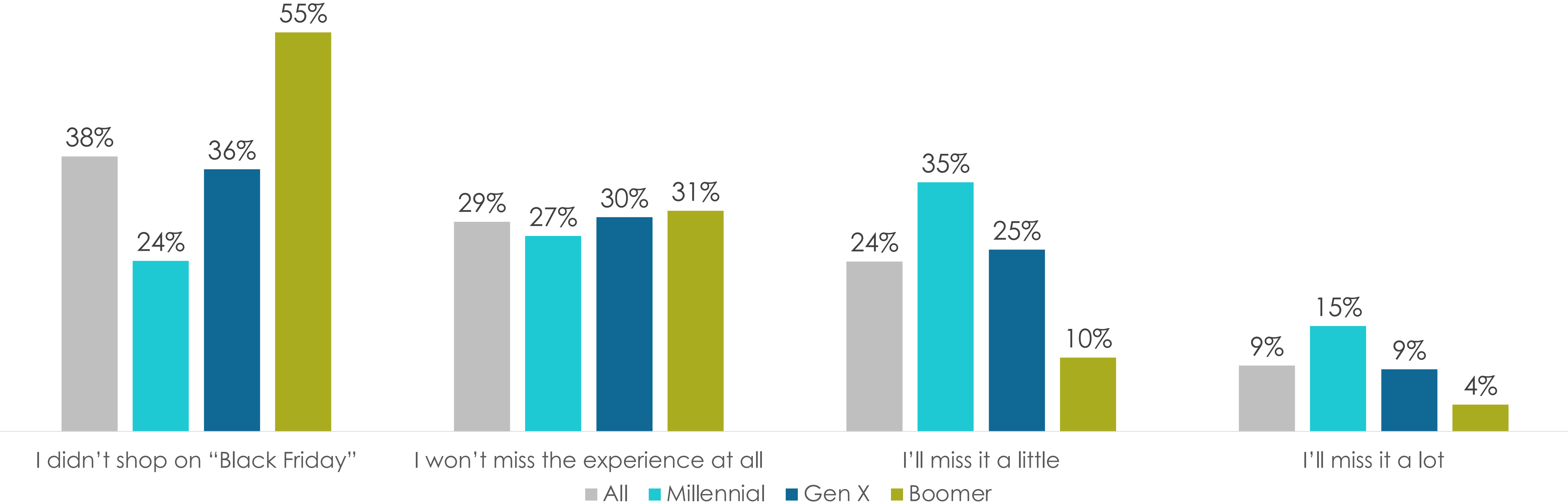
How concerned are you that the lack of cooperation between the Trump and Biden staffs could result in a delay in the distribution of the vaccines?

A man with a beard and a woman with curly hair are shopping in a store. They are both wearing face masks. The man is pointing at a shopping bag, and the woman is looking at it. They are holding several shopping bags, including brown, red, and yellow ones. The background shows a store interior with a mannequin and a bicycle.

Holiday Shopping

The presence of COVID-19 has nearly eliminated “Black Friday” as an in-store shopping event. Of the 62% of respondents who have typically participated, one-third (33%) will miss the in-store experience.

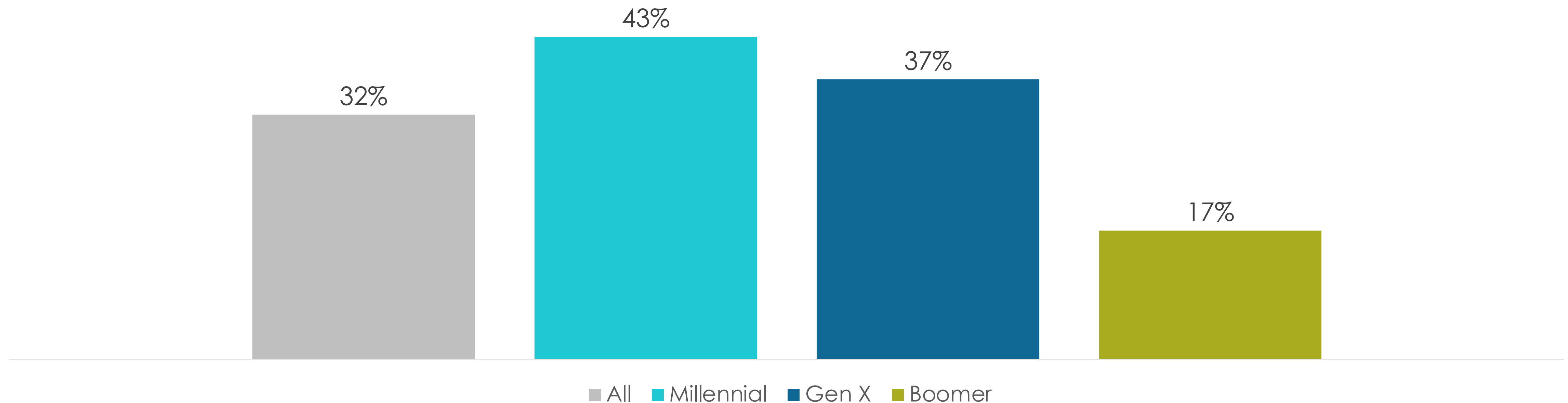
Missing shopping Black Friday in-store



How much will you miss the experience of shopping in-store on "Black Friday"?

Nearly one-third of the sample (32%) have taken advantage of the early online “Black Friday” events that have arisen because of the COVID-19 outbreak.

% Who have taken advantage of Black Friday deals

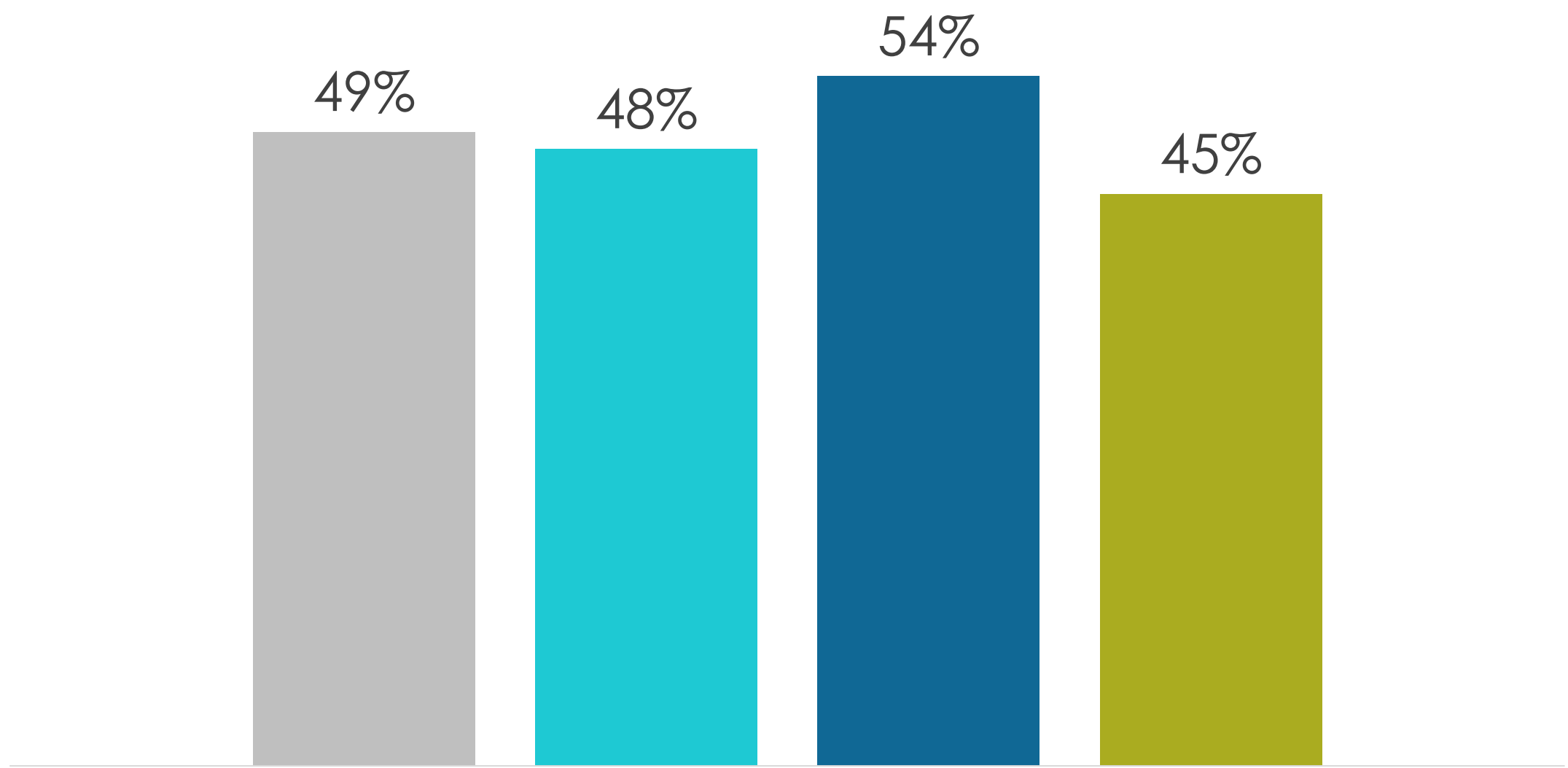


With the Coronavirus and so much shopping happening online many retailers (Amazon, Walmart, Home Depot, Best Buy, etc.) are running “Black Friday” deals early. Have you taken advantage of any of the Black Friday deals?



Among those who've participated in the early online offers, nearly half (49%) feel the deals are better than those that were typically available in-store.

% Who think Black Friday deals are better than deals they used to get in-store

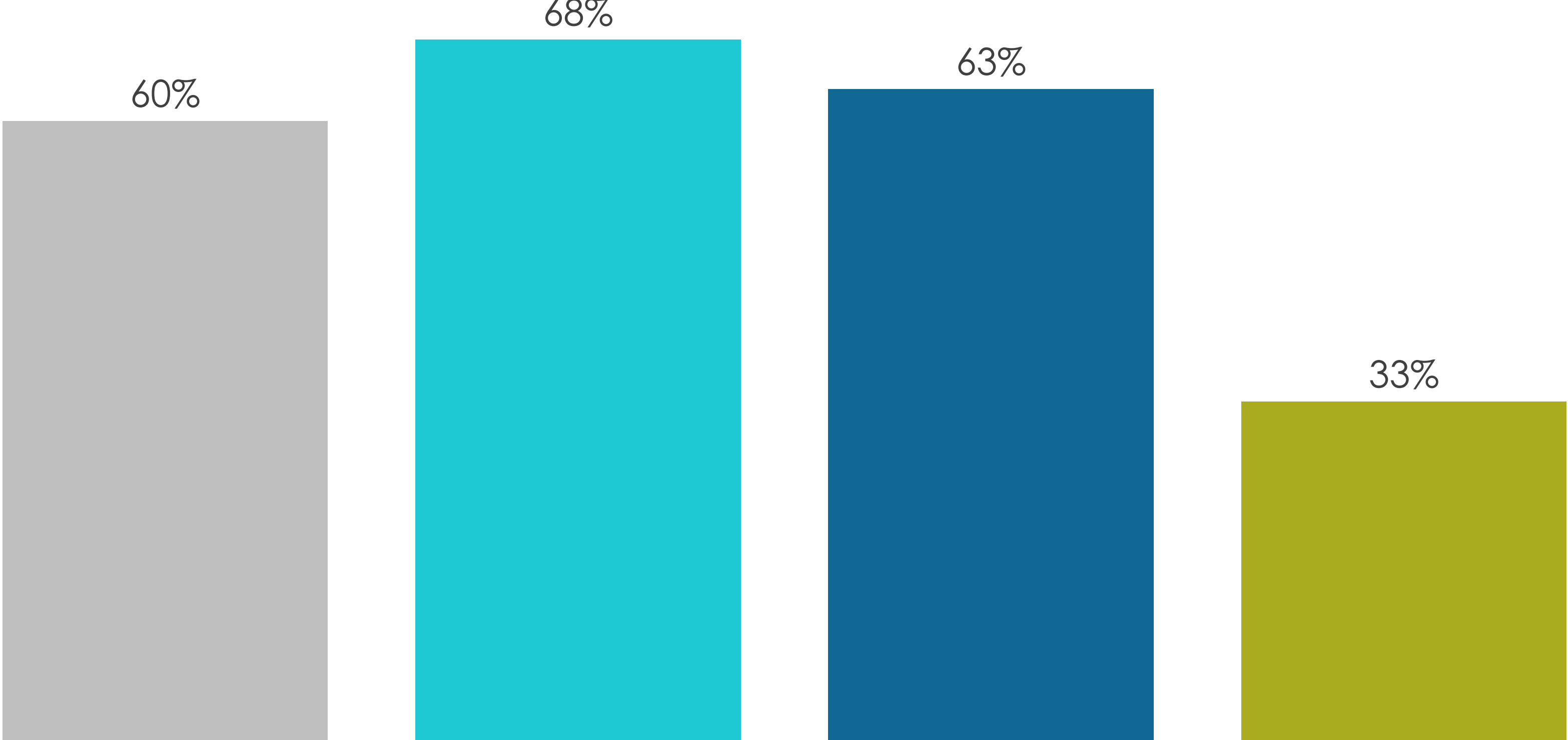


■ All ■ Millennial ■ Gen X ■ Boomer

How do you think the "Black Friday" deals being offered online compare to the deals you used to get in the store?

Early online shopping for “Black Friday” deals has resulted in back orders or out-of-stocks for the majority of respondents (60%).

% Who have experienced back orders and/or out of stocks while shopping Black Friday deals

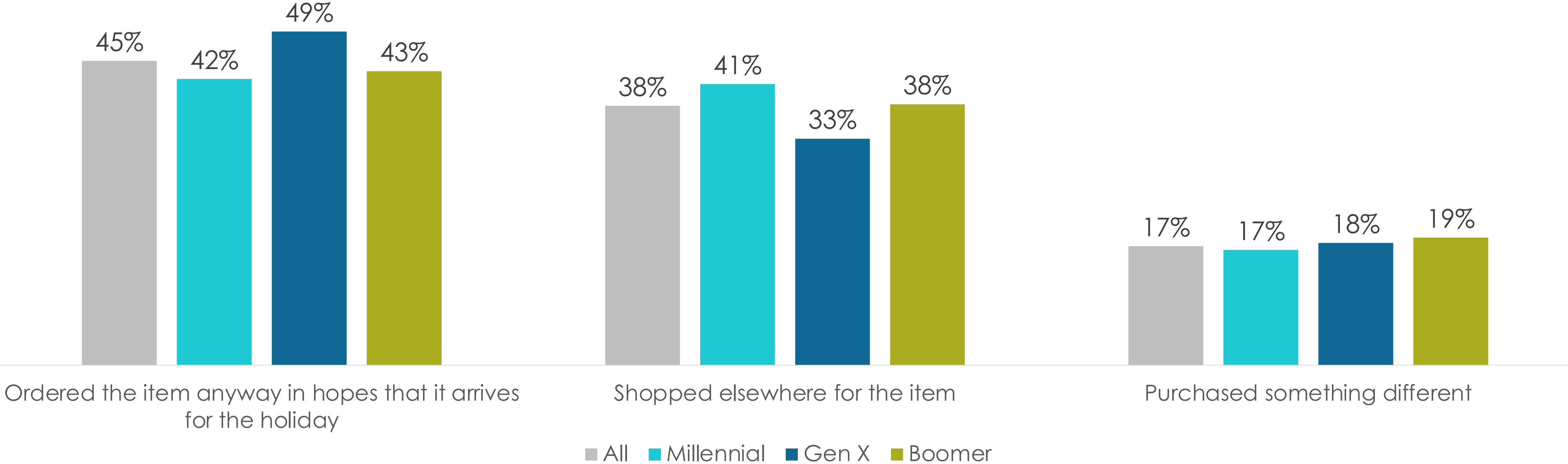


■ All ■ Millennial ■ Gen X ■ Boomer

In shopping 'Black Friday' deals online have you experienced back orders or out-of-stocks on items you wanted to purchase?

When they've encountered back orders of out-of-stocks, 45% have ordered the item anyway in hopes that it will arrive by the holidays. More than one-third (38%) have shopped elsewhere for the item.

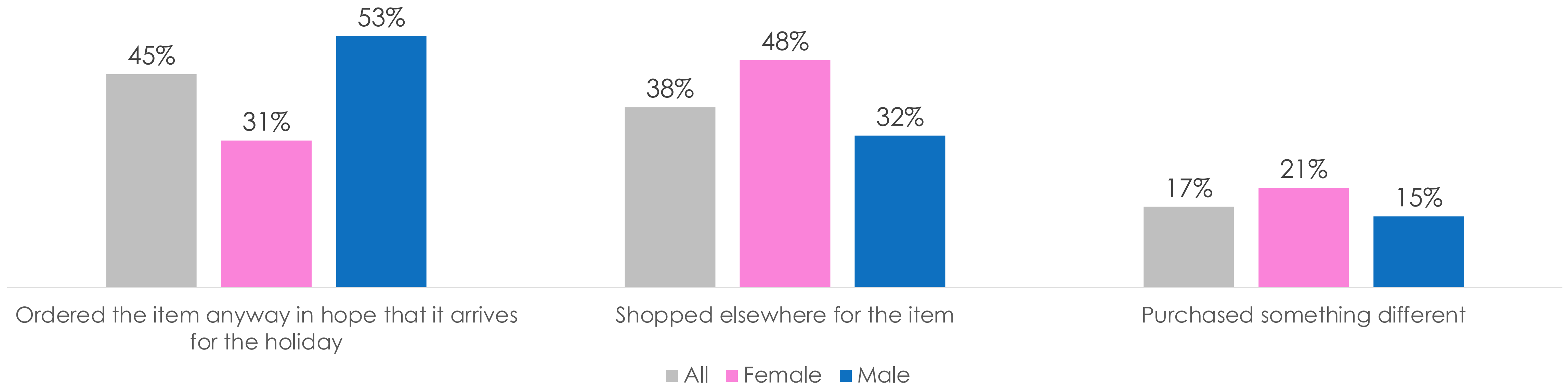
How people typically handle back orders and out-of-stocks



How have you typically handled the situation when you've encountered back orders or out-of-stocks?

Men (53%) are much more likely than women (31%) to have ordered the out-of-stock product while women are half again (48% vs. 32%) as likely to have shopped elsewhere.

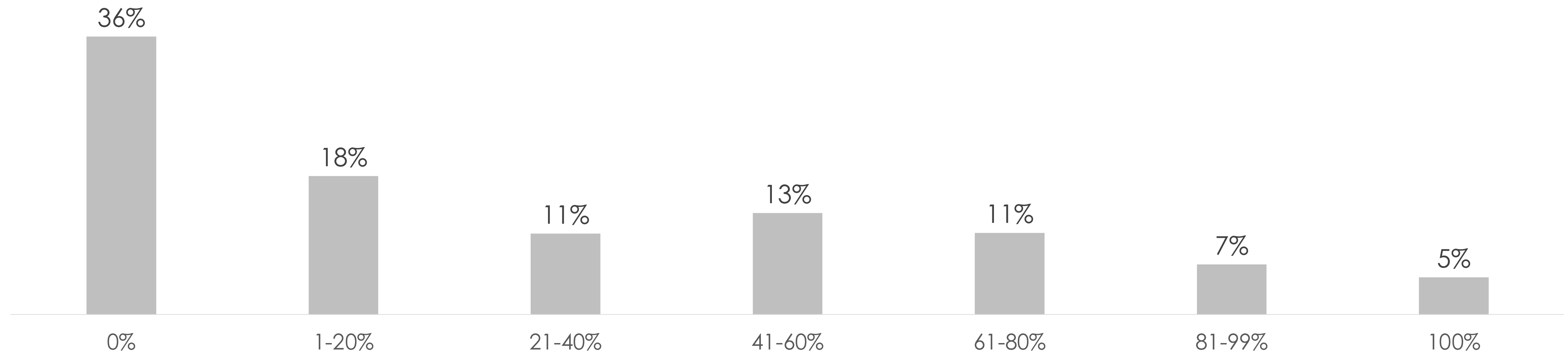
How people typically handle back orders and out-of-stocks



How have you typically handled the situation when you've encountered back orders or out-of-stocks?

More than one-third (36%) of respondents have not yet started their holiday shopping and only 12% have completed more than 80%.

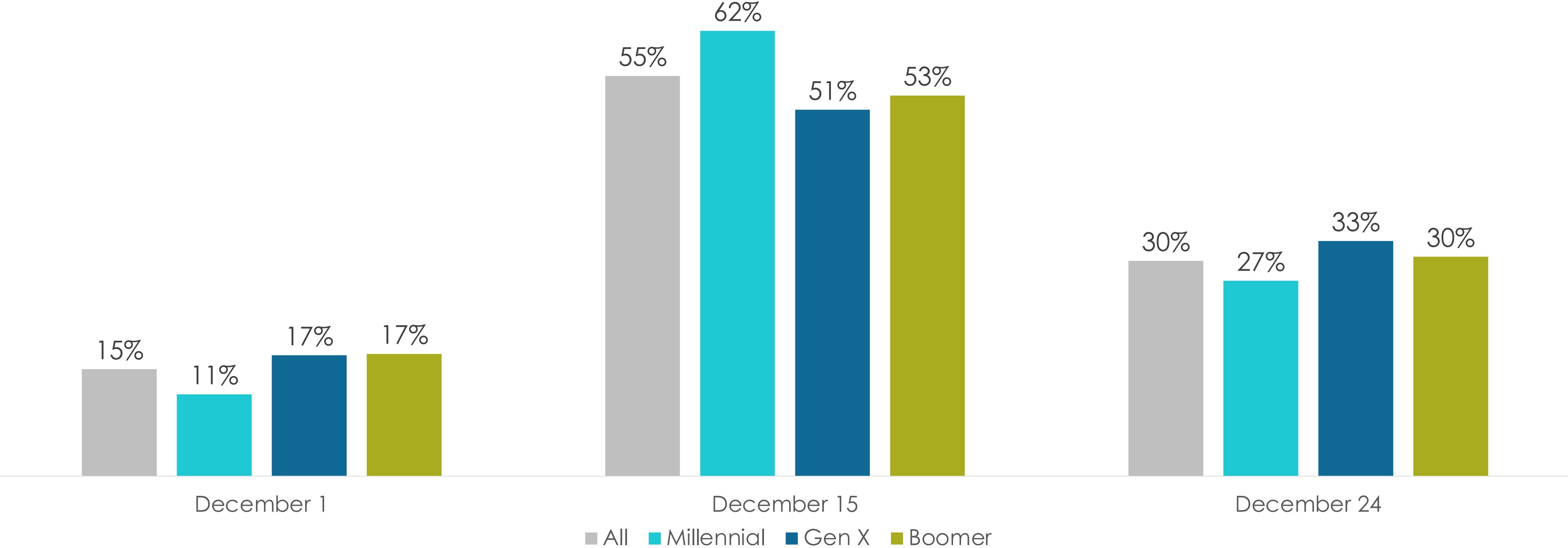
% Of holiday shopping already completed



What % of your holiday shopping have you completed?

The majority (70%) expect to have their shopping completed by December 15th. Less than one-third (30%) see their shopping being finished in the last half of December.

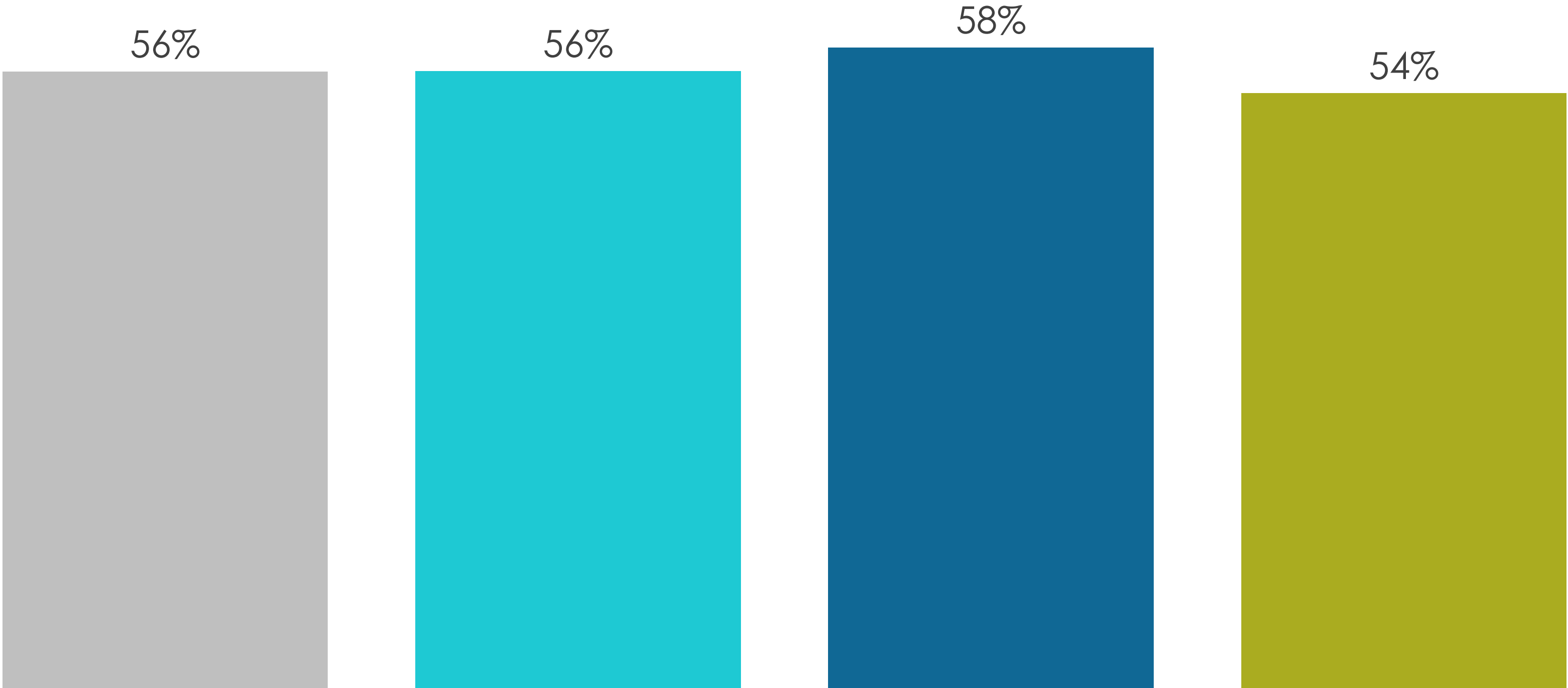
Date expected to have holiday shopping completed by



When do you expect to have your holiday shopping completed by?

Of the holiday shopping left to be completed, respondents anticipate 56% will be done online.

% of holiday shopping people will complete online



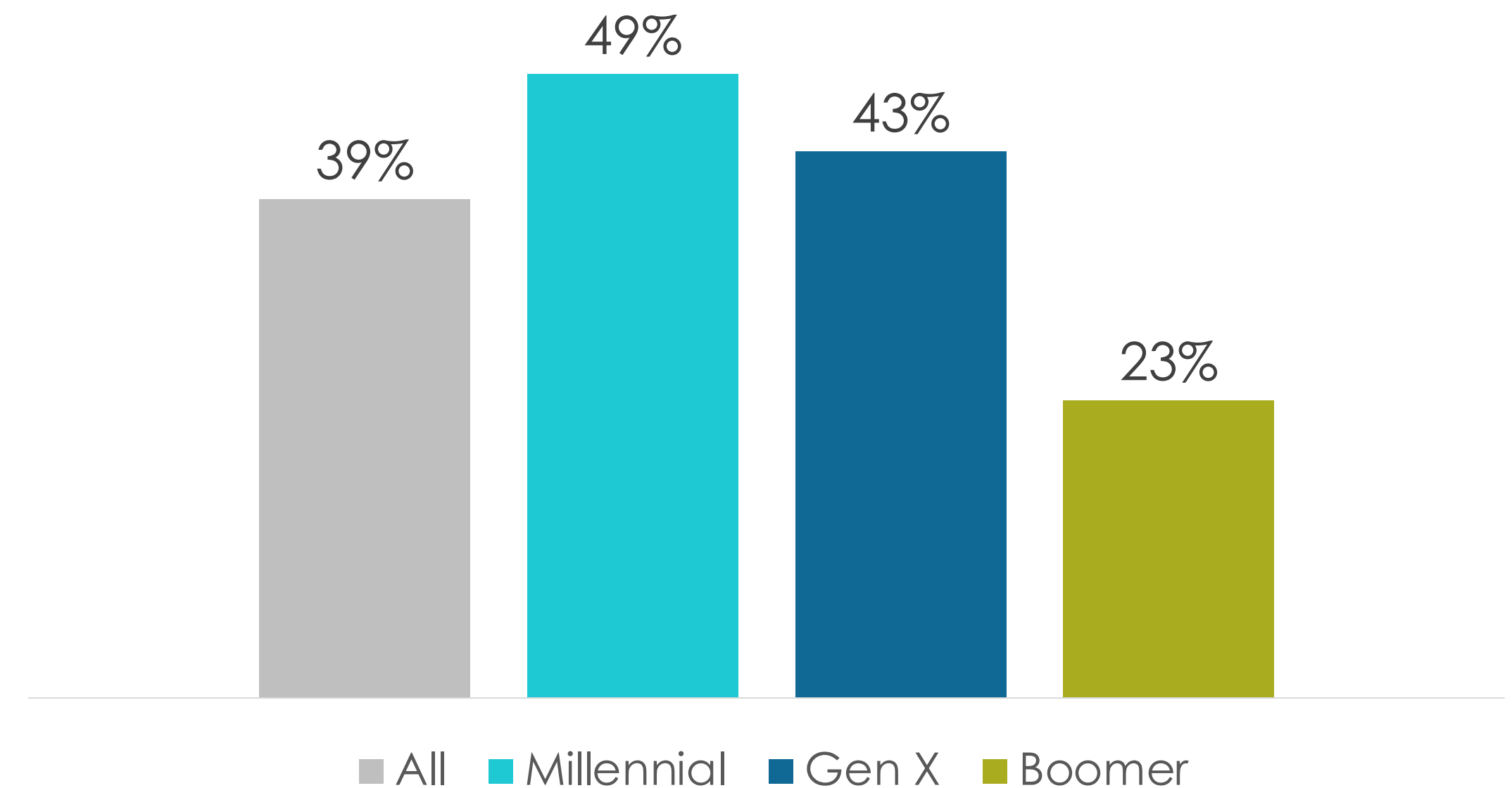
■ All ■ Millennial ■ Gen X ■ Boomer

What % of your remaining holiday shopping do you think you'll complete in-store and what % will you complete online? Total must equal 100.



Among those who'll be shopping online, more than one-third (39%) anticipate shipping delays resulting from the abnormally high volume of traffic.

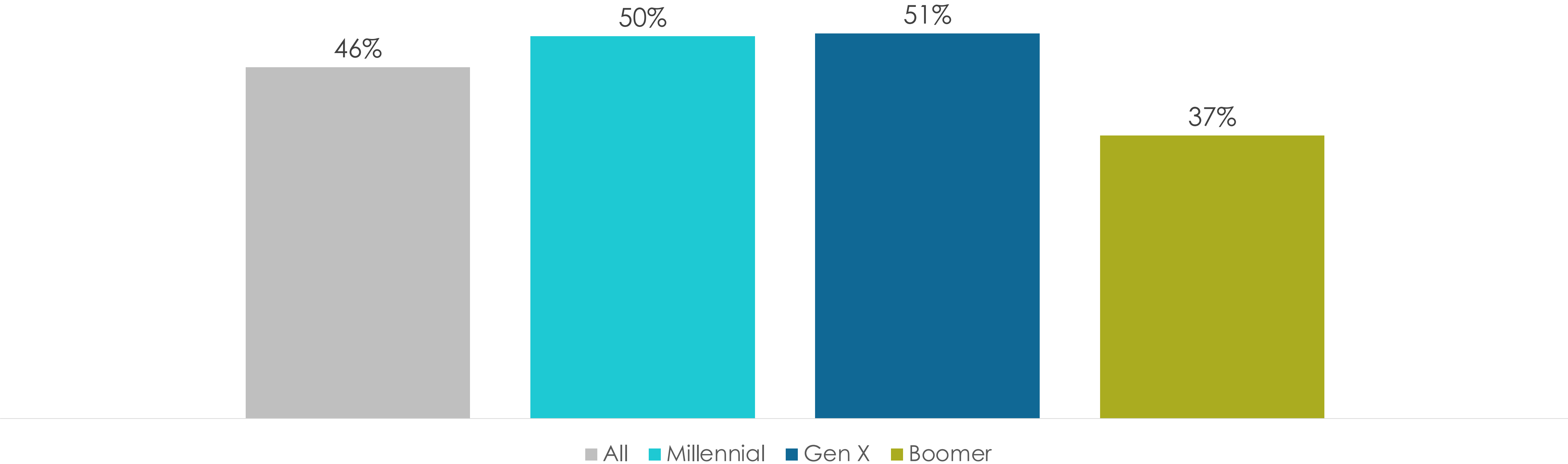
% Who are concerned about shipping times due to large quantity of online orders



With the large quantity of holiday items being ordered online, how concerned are you about shipping times?

Nearly half (46%) of those planning on doing a portion of their remaining shopping in-store are concerned that the increasing severity of the COVID outbreak could interfere.

% Who are concerned about their ability to shop in-store due to severity of COVID-19



With the severity of the COVID outbreak increasing around the country how concerned are you about your ability to shop in store?

Summary

COVID-19 Hot Topics

- This week's announcement by Moderna that they've developed a safe and highly effective COVID-19 vaccine has bolstered confidence in the vaccines for 40% of respondents.
 - Nearly one-quarter (24%), however, have had their confidence reduced.
 - Men (54%) were significantly more likely than women (28%) to report an increase in confidence in the safety and efficacy of the vaccines.
- People appear cognizant of the challenges associated with the mass production and distribution of the vaccines. More than one-third (35%) don't believe they'll have access to a vaccine until April 15th or later.
 - Surprisingly, the higher risk Boomers don't see themselves as having access to the vaccine any sooner than the rest of the population.
- Despite the higher confidence level expressed, less than half of the respondents (47%) say they are likely or very likely to get the vaccine.
 - Women (36%) are significantly less likely to be planning on getting the vaccine than men (60%).

Summary - Continued

- 49% of the sample defined themselves as high risk based on their age and/or a preexisting condition. Only half of those people are likely or very likely to get the vaccine while nearly one-third (32%) are not likely to get the vaccine.
- Among those planning to get the vaccine, the majority (55%) have no preference for whether they receive the Pfizer or Moderna vaccine.
 - Among the 46% who do have a preference for either the Moderna or Pfizer vaccine, the majority (58%) will still get whichever vaccine is available to them first.
- More than half (57%) of the respondents are concerned that the lack of cooperation between the Trump and Biden staffs could result in the delayed distribution of the vaccines.

Holiday Shopping

- The presence of COVID-19 has nearly eliminated in-store “Black Friday” shopping as we’ve known it. Of the 62% of respondents who have typically participated, more than half (33%) will miss the in-store experience.
- Nearly one-third of the sample (32%) has taken advantage of the early “Black Friday” online events that have arisen because of the COVID-19 outbreak.
- Among those who’ve participated in the early online offers, nearly half (49%) feel the deals are better than those that were typically available in -tore.

Summary - Continued

- Early online shopping for “Black Friday” deals has resulted in back orders or out-of-stocks for the majority of respondents (60%).
- When they’ve encountered back orders or out-of-stocks, 45% have ordered the item anyway in hopes that it will arrive by the holidays. More than one-third (38%) have shopped elsewhere for the item.
 - Men (53%) are much more likely to have ordered the out-of-stock product than women (31%) while women are half again (48% vs. 32%) as likely to have shopped elsewhere.
- More than one-third (36%) of respondents have not yet begun their holiday shopping, and only 12% have completed more than 80%.
- The majority (70%) expect to have their holiday shopping completed by December 15th. Less than one-third (30%) see their shopping being finished in the last half of December.
- Of the shopping left to be completed, respondents anticipate 56% will be done online.
- Among those who’ll be shopping online, more than one-third (39%) anticipate shipping delays resulting from the abnormally high volume of traffic.
- Nearly half (46%) of those planning on doing a portion of their remaining shopping in-store are concerned that the increasing severity of the COVID outbreak could interfere.