



COVID-19 U.S. CONSUMER IMPACT TRACKING STUDY – WEEK 39

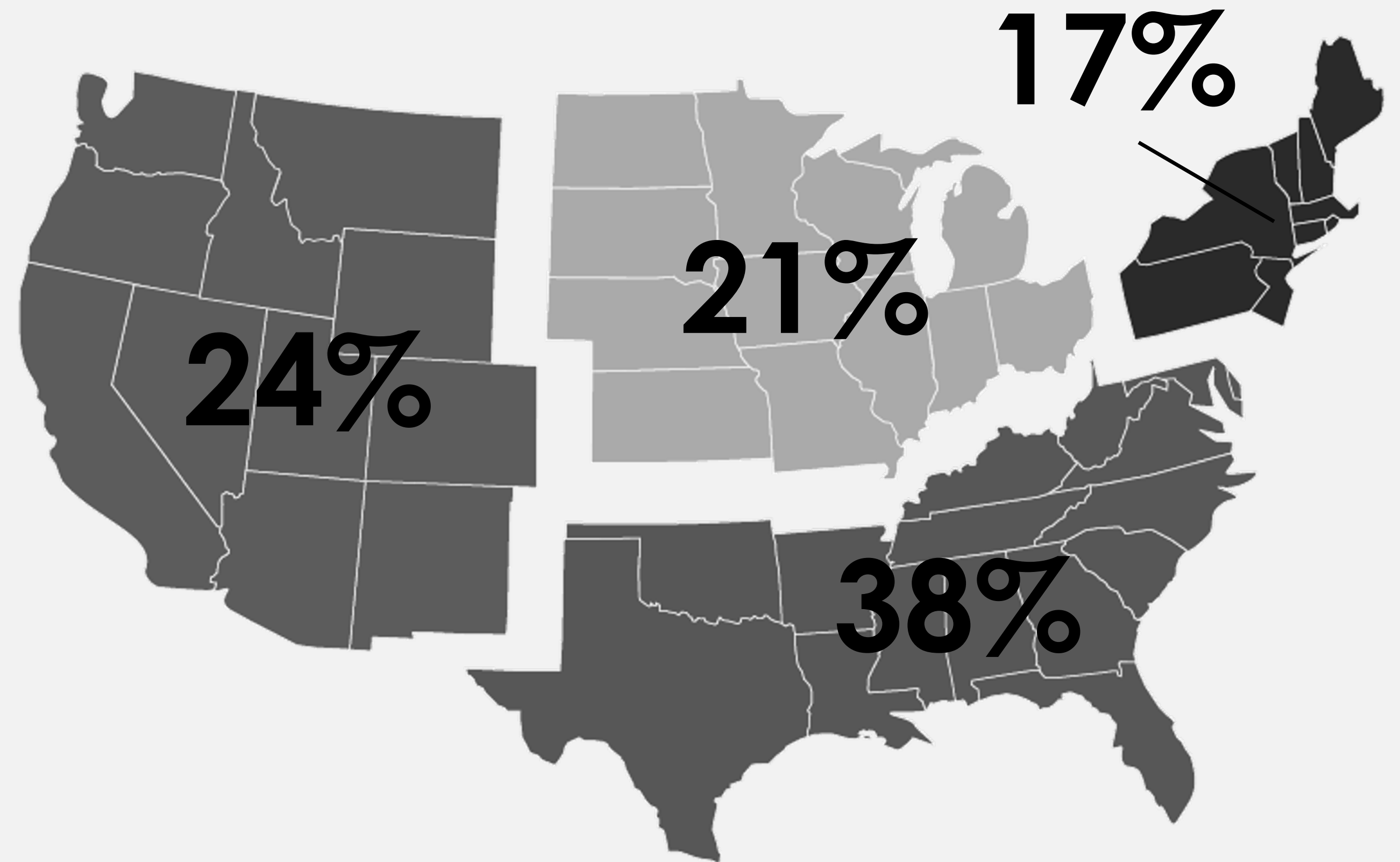
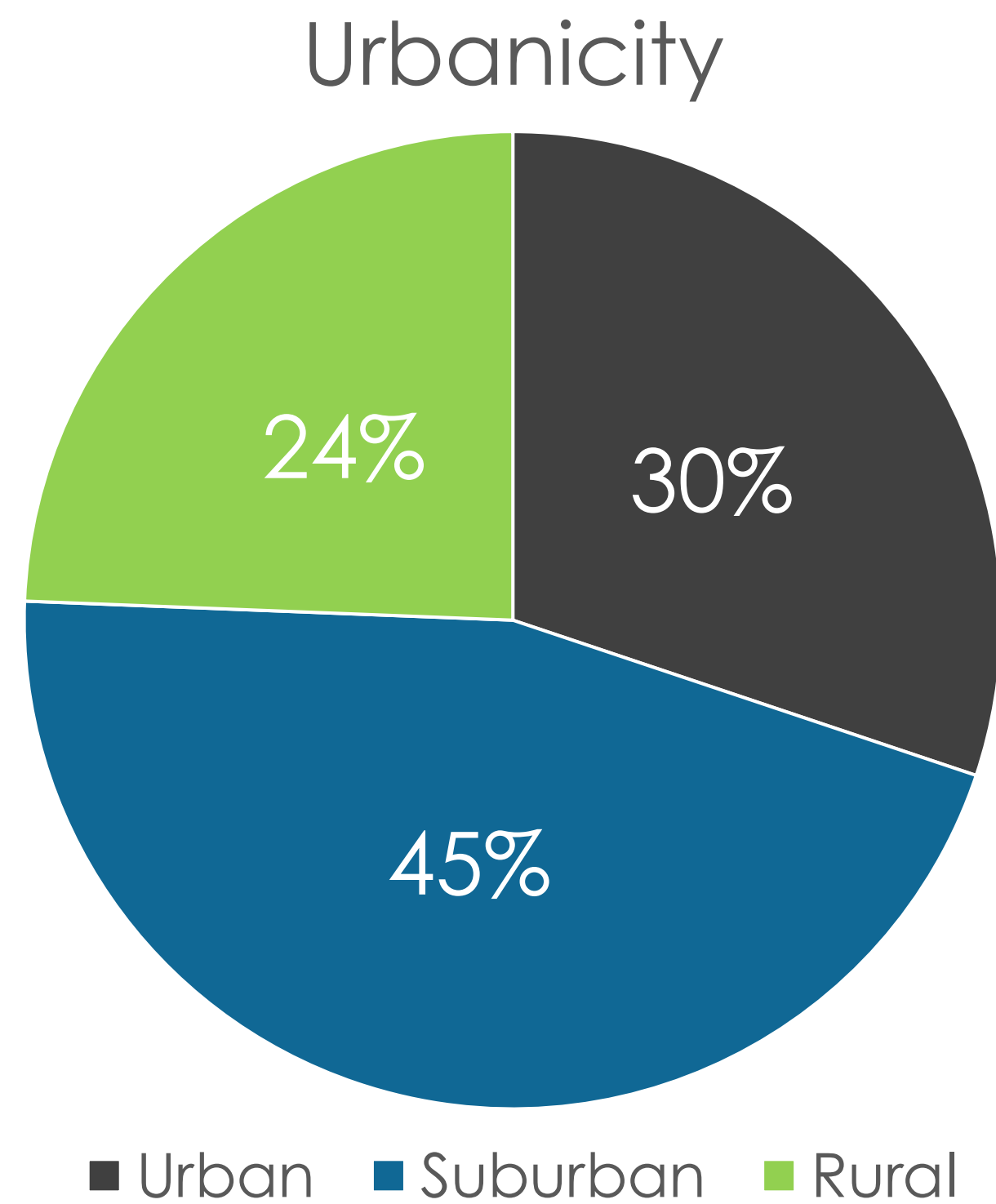
PRESENTED DECEMBER 7, 2020

Methodology

- N = 616
- MOE = $\pm 3.95\%$
- Panel: General Population
- Collected: 12/03/20, 12/04/20

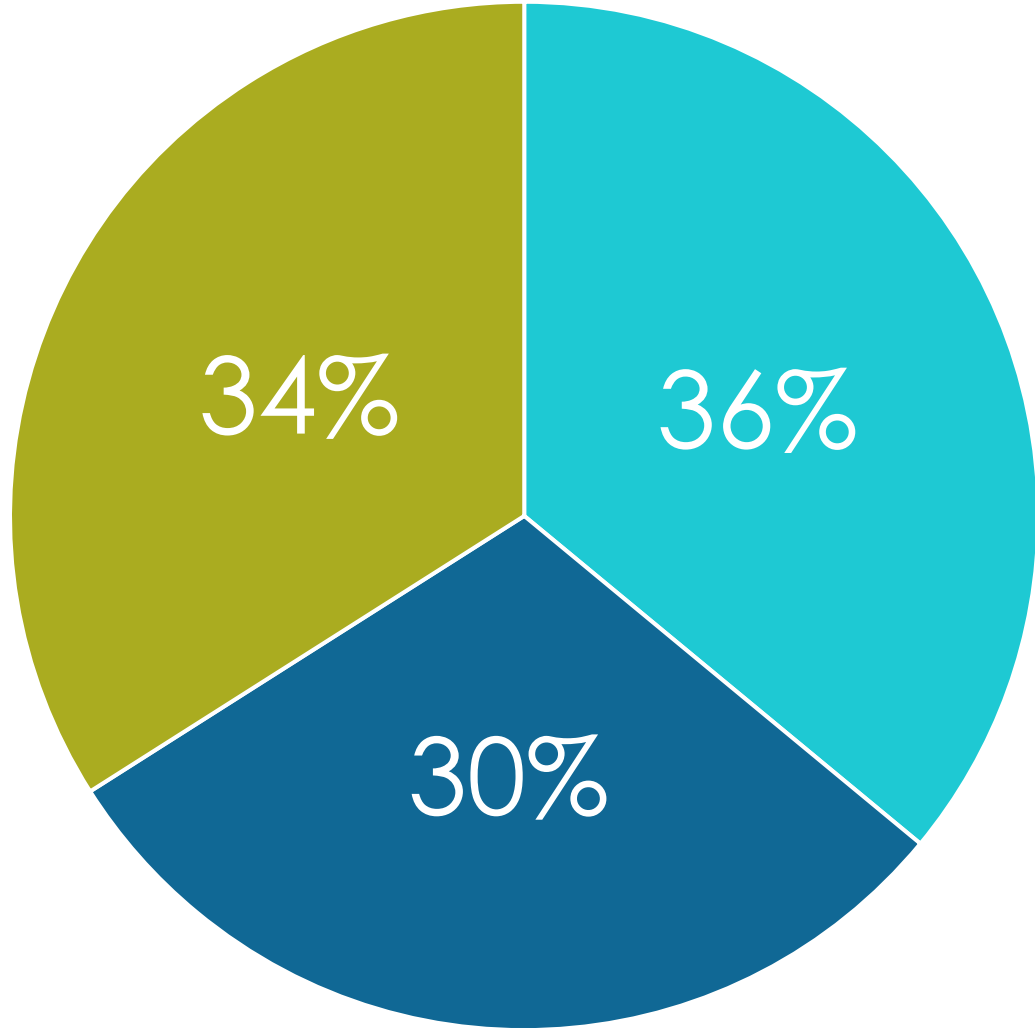


Panel Composition



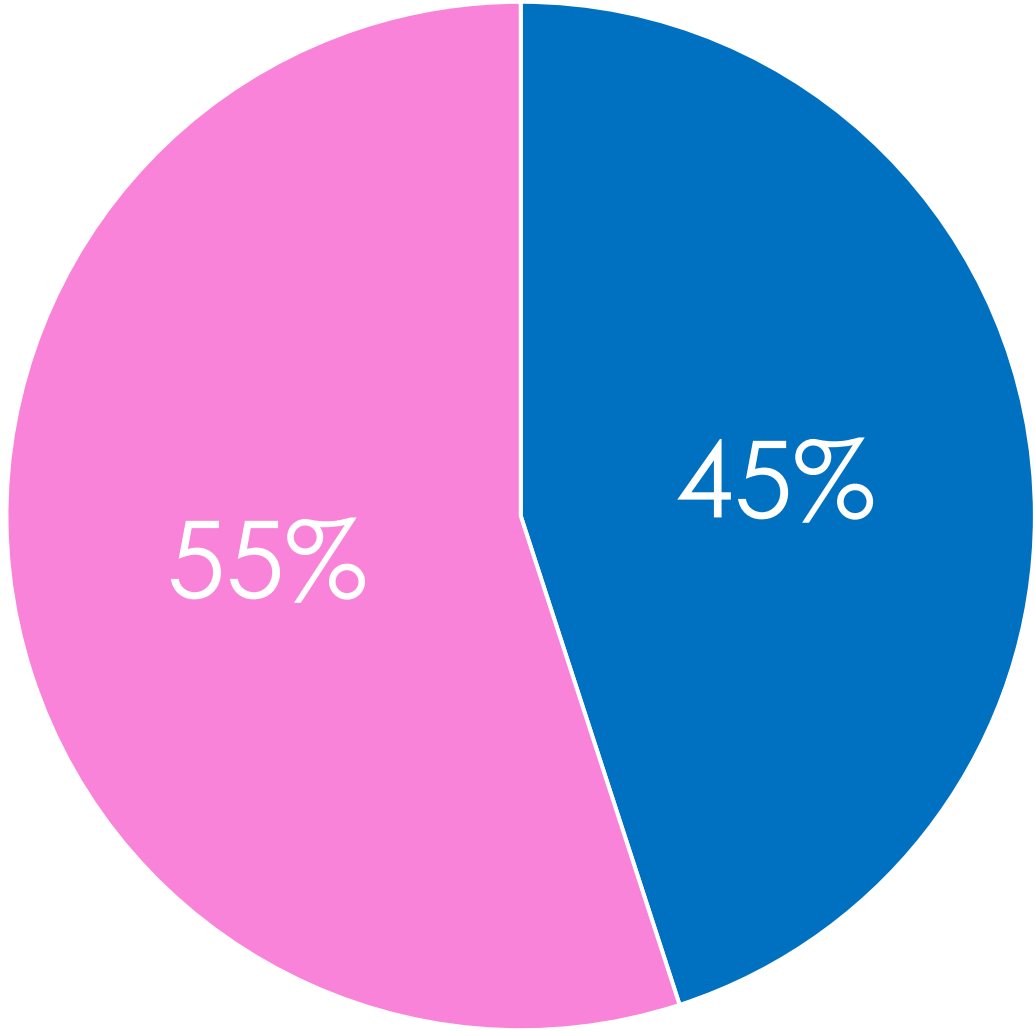


Generation



■ Millennial ■ Gen X ■ Boomer

Gender



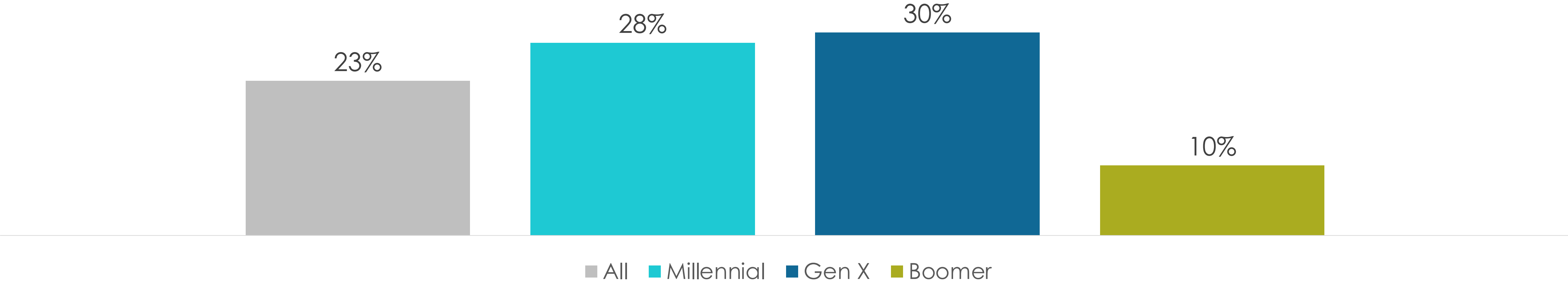
■ Male ■ Female



Holiday Shopping

The decline in brick-and-mortar sales on Black Friday is not a surprise given that less than one-quarter (23%) of respondents shopped in-store.

% Who went in-store on Black Friday

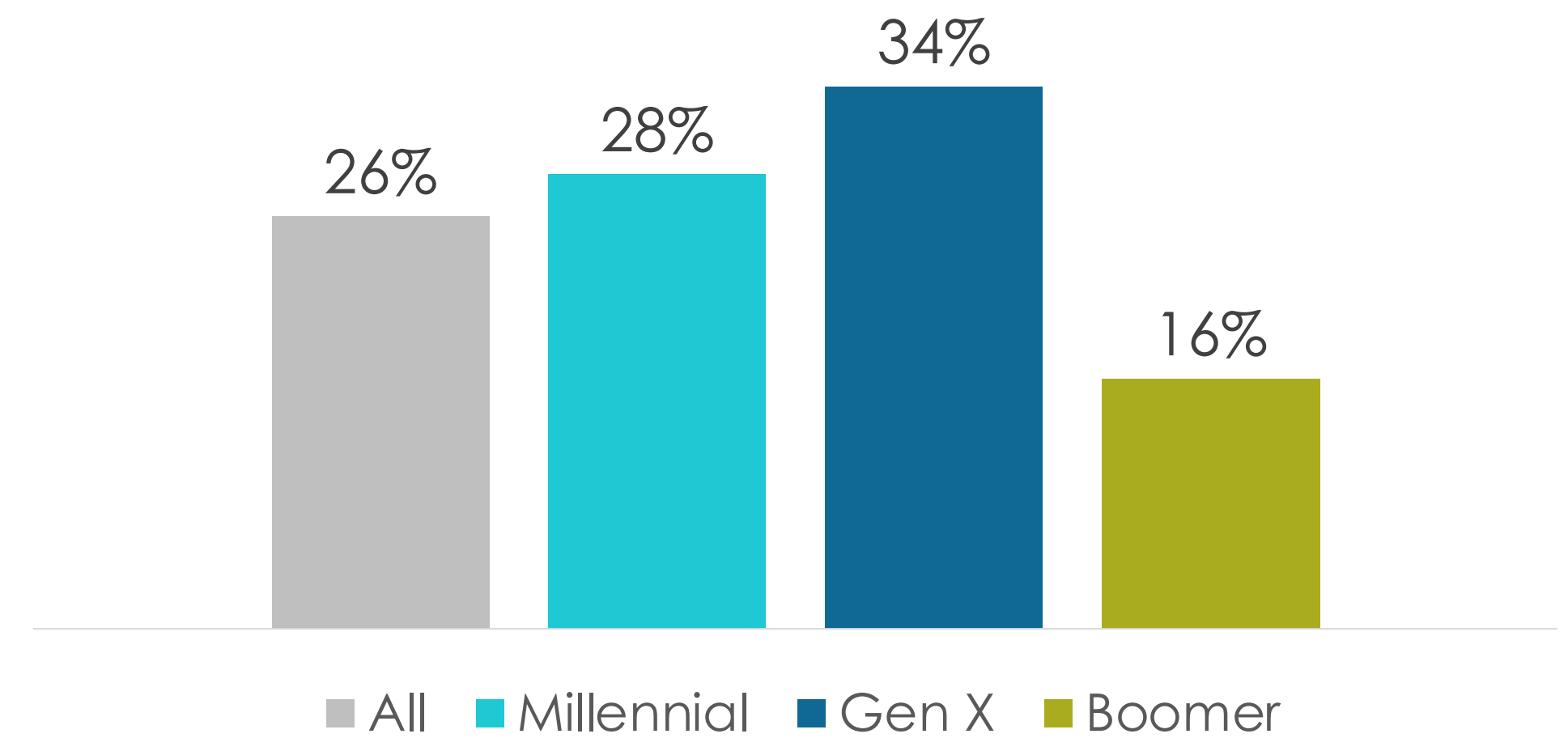


Did you shop in a store or stores on "Black Friday"?



The remainder of the weekend did not fare much better as only 26% of respondents were in stores Saturday and/or Sunday of Thanksgiving weekend.

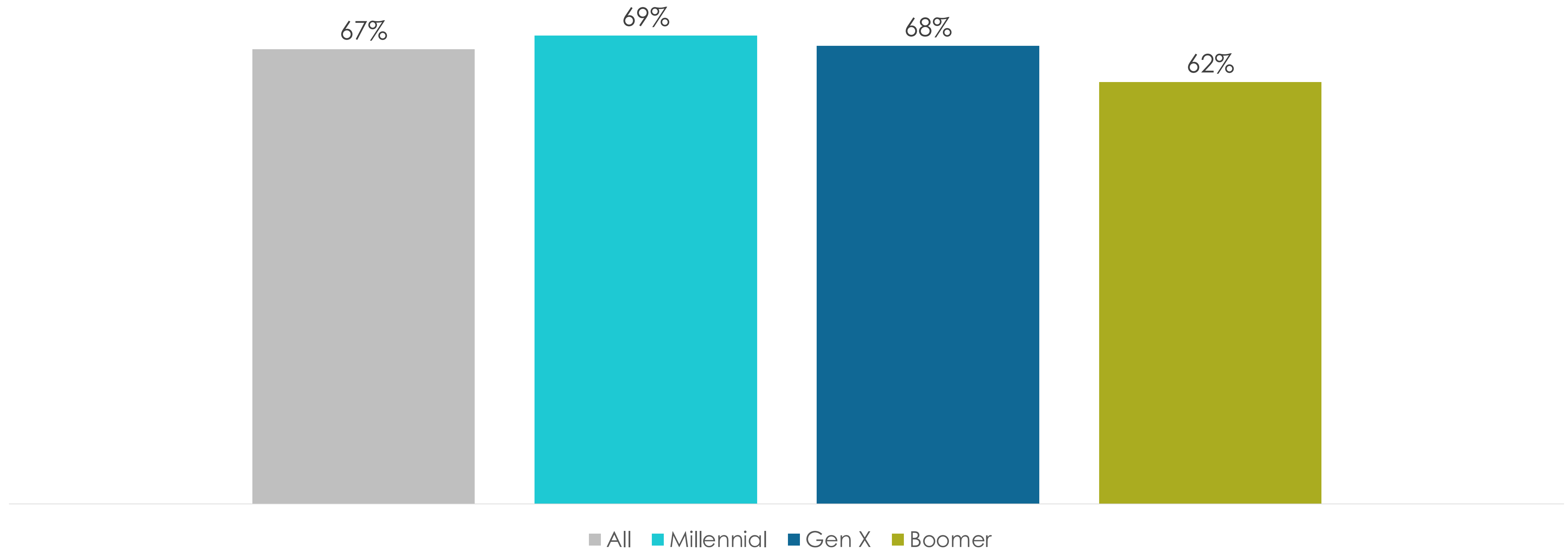
% Who Shopped In-Store on Saturday and/or Sunday of Thanksgiving Weekend



Did you do any holiday shopping in stores on Saturday and/or Sunday of Thanksgiving weekend?

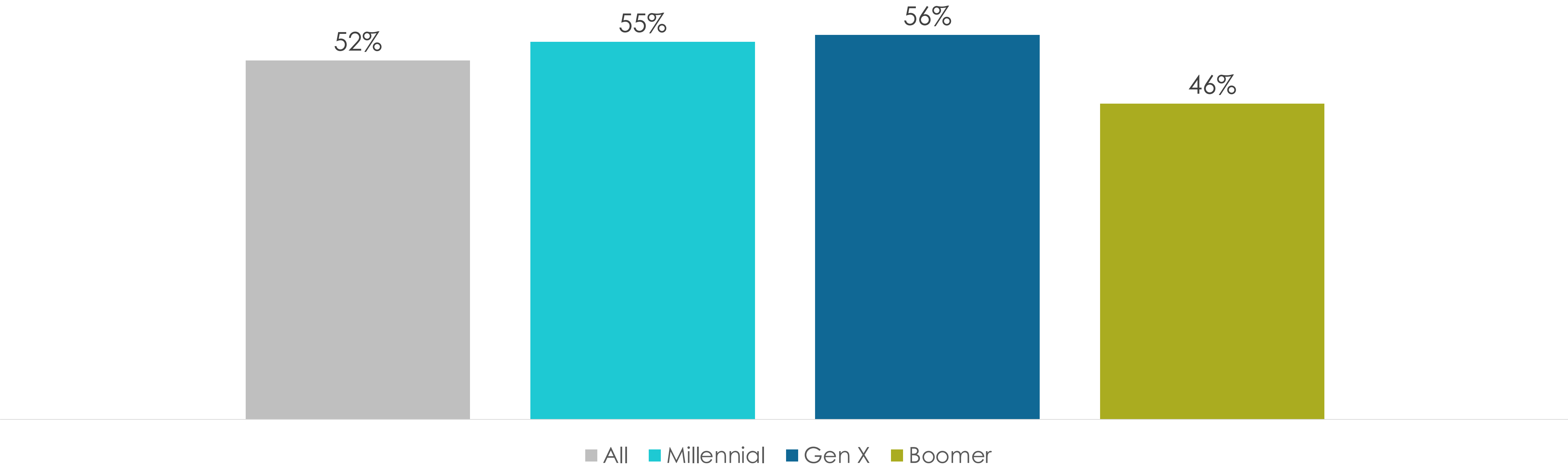
Only two-thirds of respondents were satisfied with the safety precautions (masks, social distancing, etc.) of the other shoppers.

% Who said people were following safety guidelines while shopping Thanksgiving weekend



Compared to the limited number of people who were in stores, more than half (52%) of respondents report having done online shopping Thanksgiving weekend.

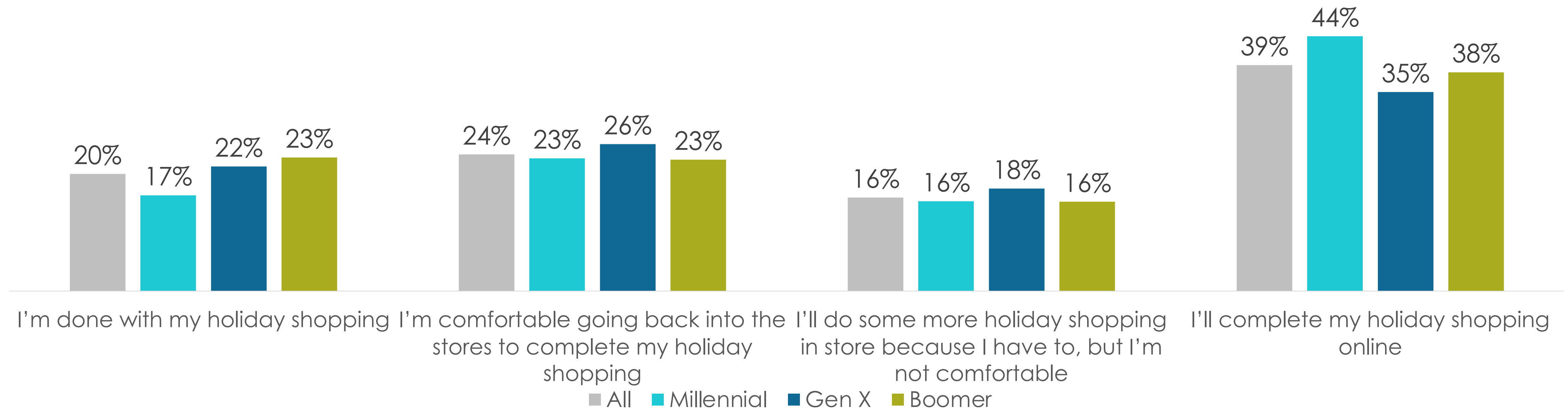
% Who did any online holiday shopping over the Thanksgiving holiday



Did you do any online holiday shopping over the Thanksgiving holiday (Thursday through Sunday)?

20% of respondents report they've completed their holiday shopping. Of the remaining 80%, half will return to the stores. 16% of the 40% planning to go back in-store would prefer not to.

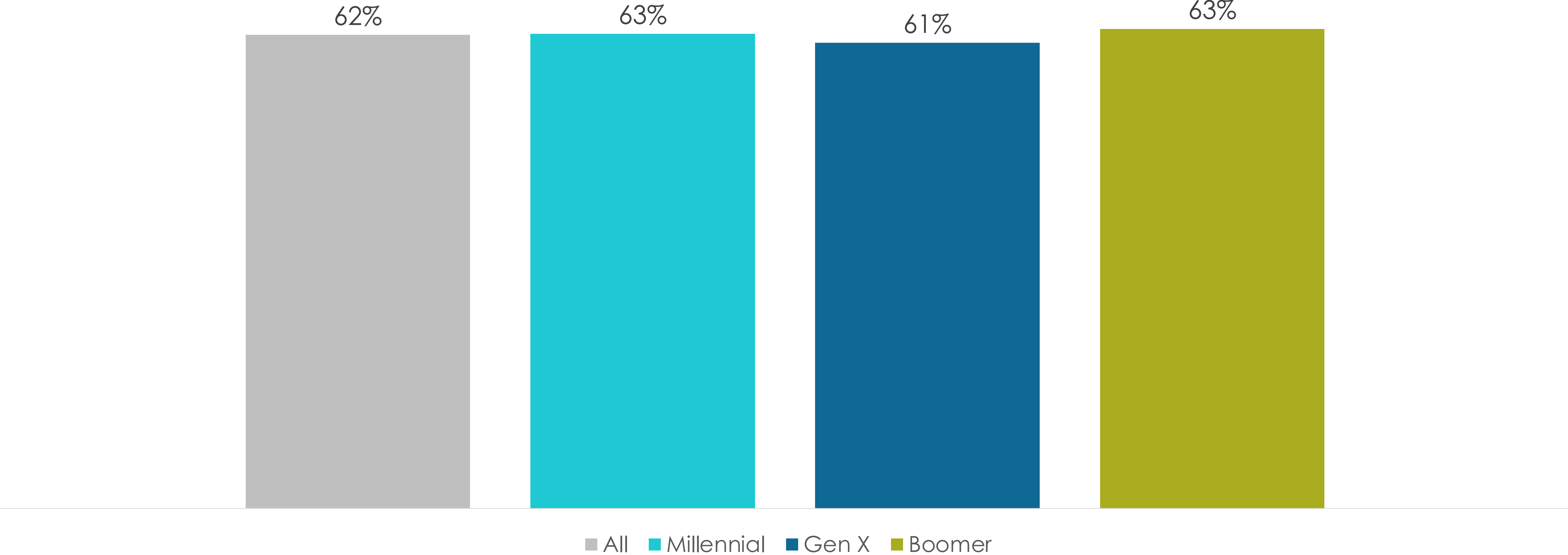
Approach to Doing Holiday Shopping In-Store



Which of the following best describes your approach to doing other holiday shopping in store this year?

In addition to the 39% of people that will complete their shopping online, many of those planning in-store visits will also be shopping online. In total, consumers anticipate 62% of their remaining holiday shopping will be completed online.

% of Remaining Holiday Shopping: Online

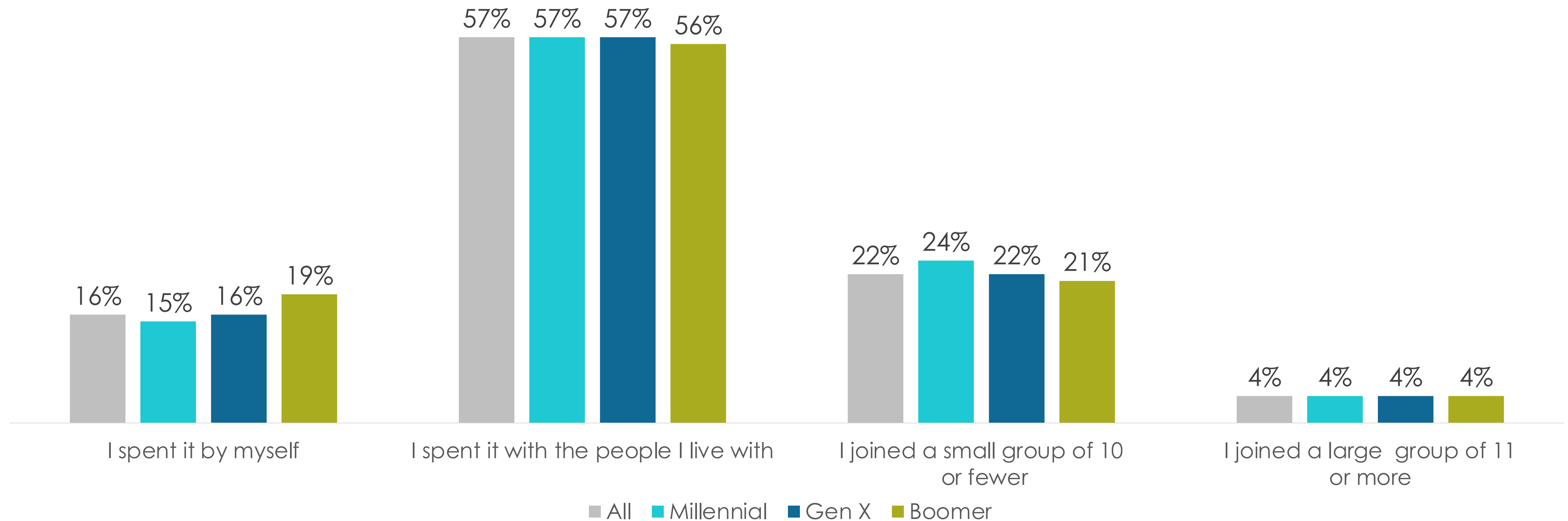


What % of your remaining holiday shopping do you think you'll complete in-store and what % will you complete online? Total must equal 100.

Holiday Activity

By and large, people's social behavior at Thanksgiving was conservative. 73% spent the holiday by themselves or with those with whom they live. Only 4% joined a gathering of 11 or more.

Description of how Thanksgiving was spent

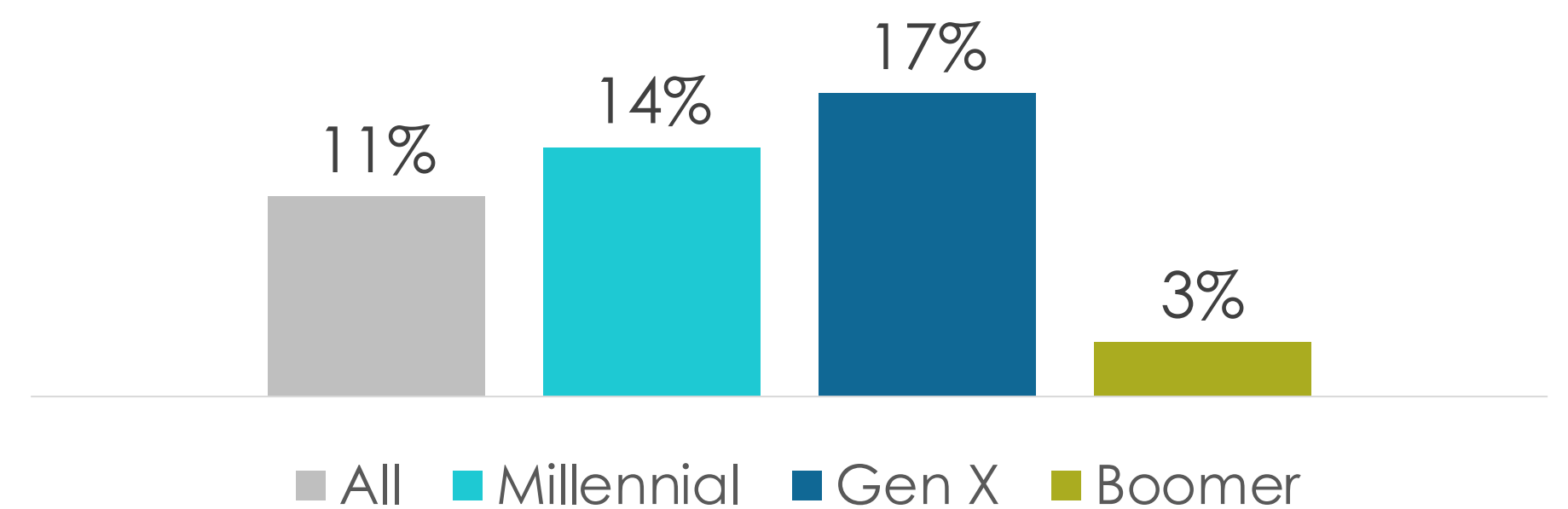


Which of the following best describes how you spent the Thanksgiving holiday?



Only 11% of respondents engaged in overnight travel over the Thanksgiving weekend. This is slightly less than half of the 26% of respondents who joined a group beyond those with whom they live.

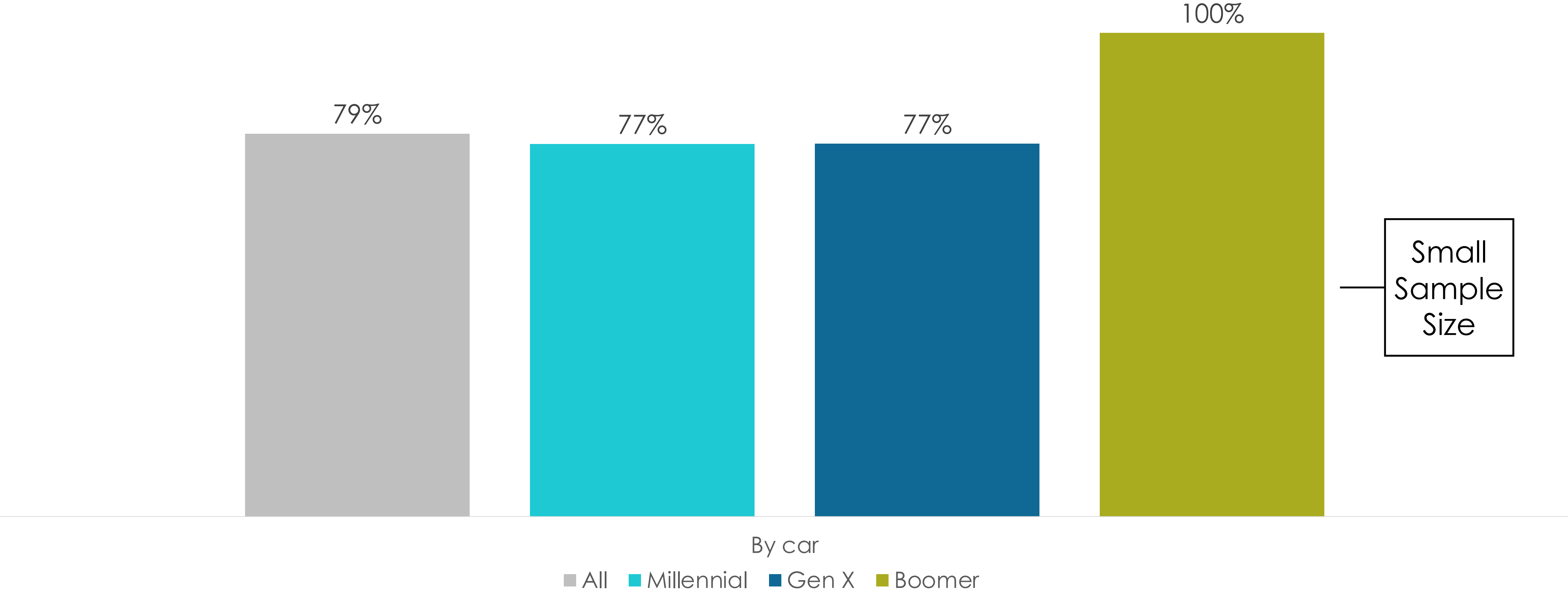
% Of people who did overnight travel for Thanksgiving



Did you do any overnight travel over the holiday weekend?

Although airlines set pandemic-era records during the Thanksgiving holiday, the vast majority (79%) of those who traveled overnight at Thanksgiving did so by car.

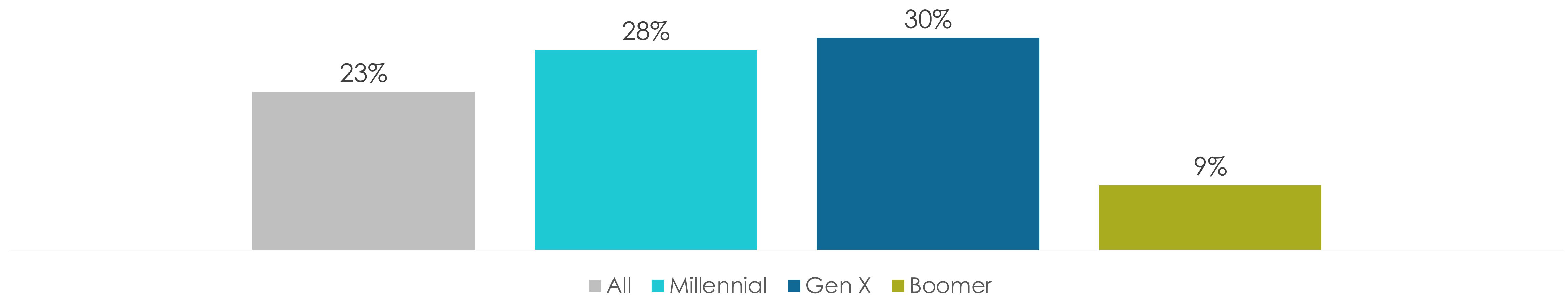
Method of overnight travel for Thanksgiving



Did you do any overnight travel over the holiday weekend?

Despite the caution demonstrated, nearly one-quarter (23%) of respondents are concerned that their Thanksgiving behaviors increased the possibility that they were exposed to COVID.

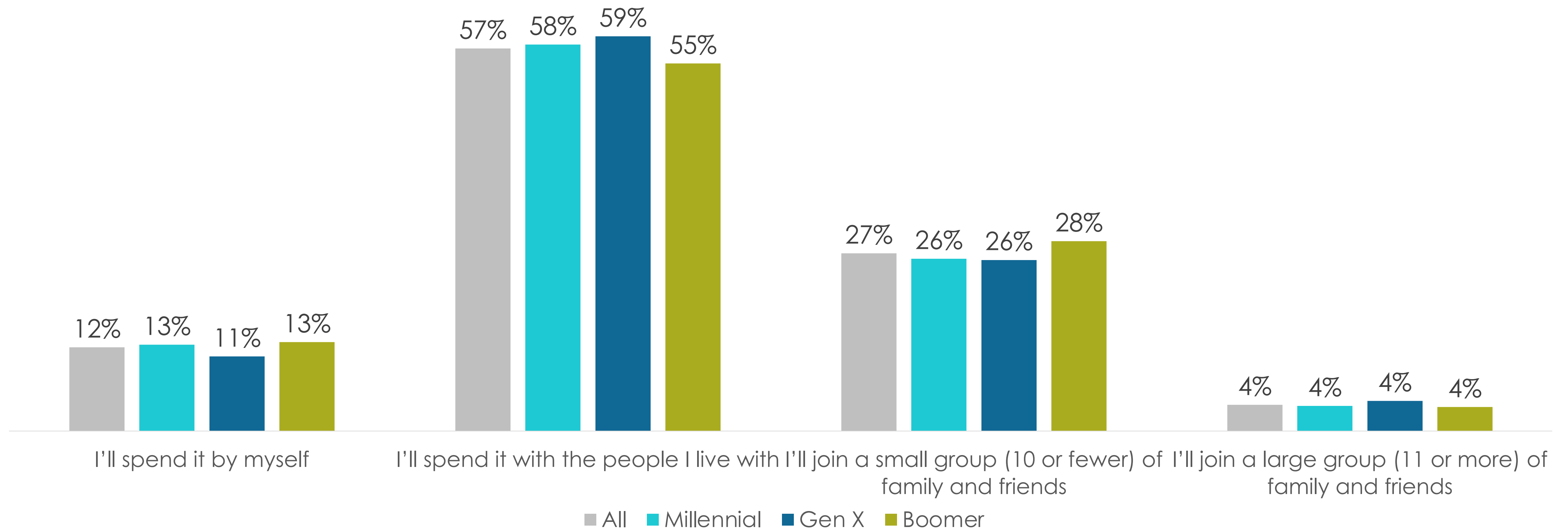
% Who are concerned that their approach to Thanksgiving increased chance of COVID-19 exposure



How concerned are you that your approach to the Thanksgiving holiday may have increased your risk of exposure to COVID-19?

Behaviors during the December holidays are expected to mirror those at Thanksgiving. Only 31% plan to join gatherings with people beyond those with whom they live.

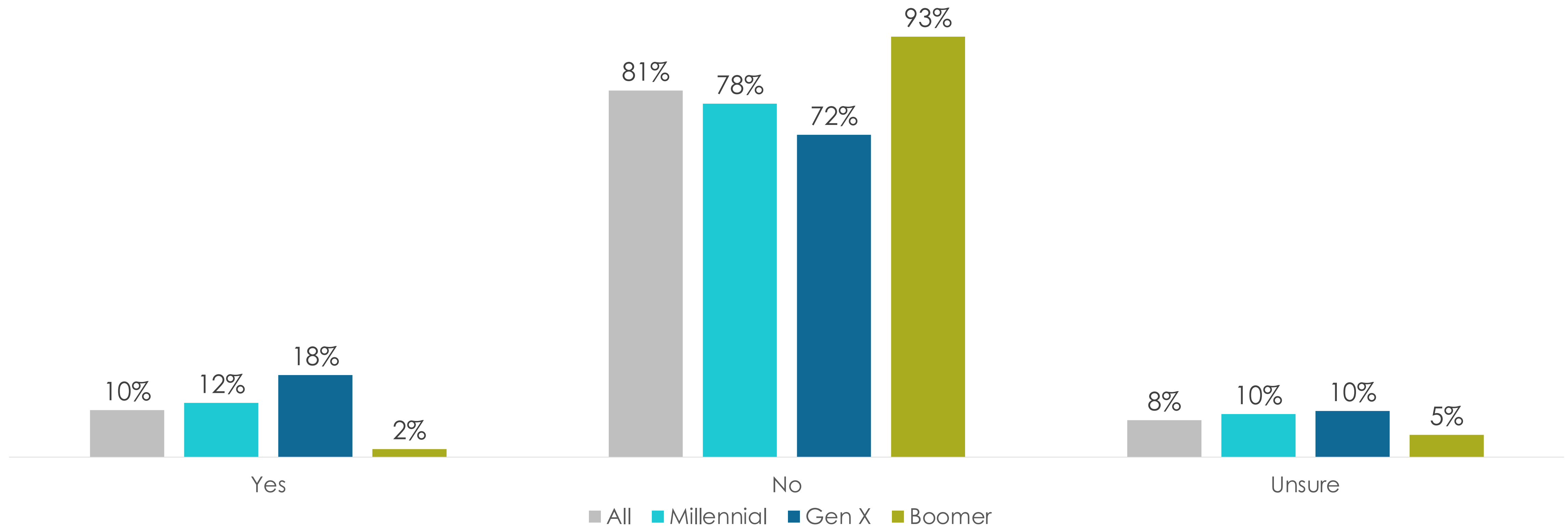
How December holidays will be spent



How will you spend the December holidays?

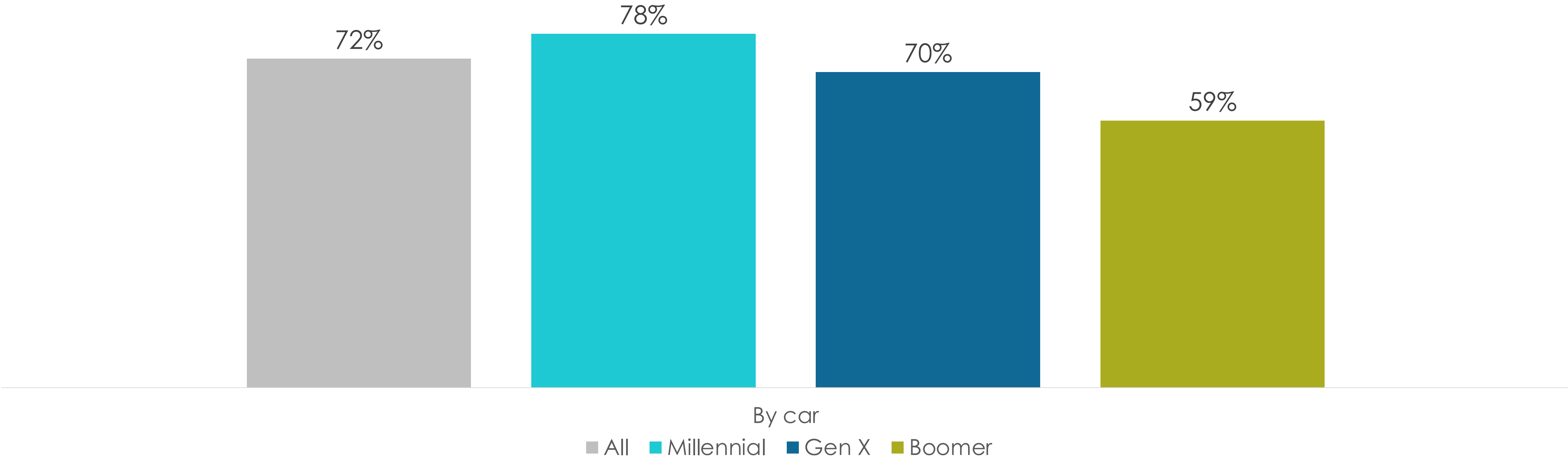
Overnight travel may be more extensive over the December holidays. Compared to the 11% that did so at Thanksgiving, 10% are planning overnight travel in December and another 8% are still considering it.

Plan to travel overnight for December holiday



Like Thanksgiving, overnight travel in December will still largely be done by car (72%) rather than public transportation (28%).

Overnight travel by car for the December holiday

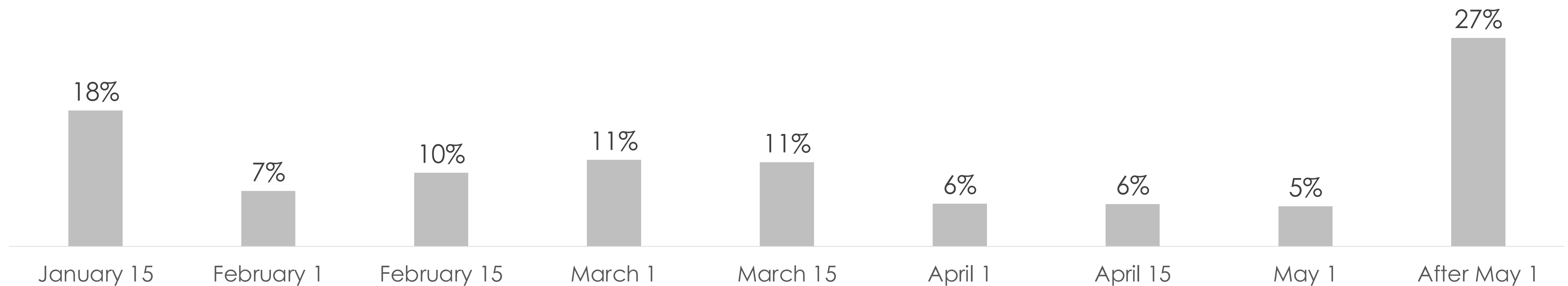




COVID-19 Hot Topics

Given the most recent news on the availability of COVID-19 vaccines, it appears a significant portion of the 25% of people who expect a vaccine to be available for them by February 1st will be disappointed.

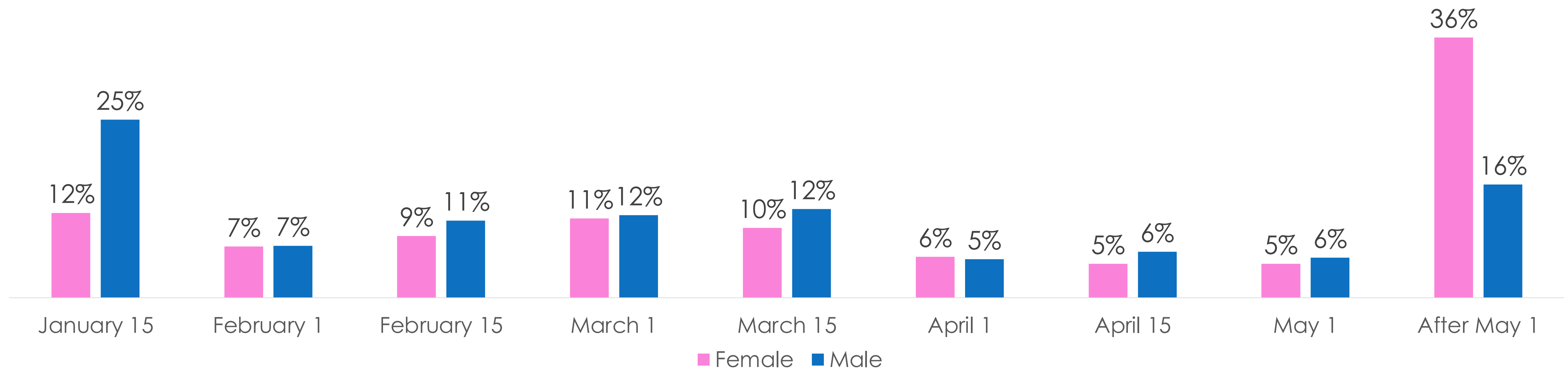
Expected date for vaccine to be available for you



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

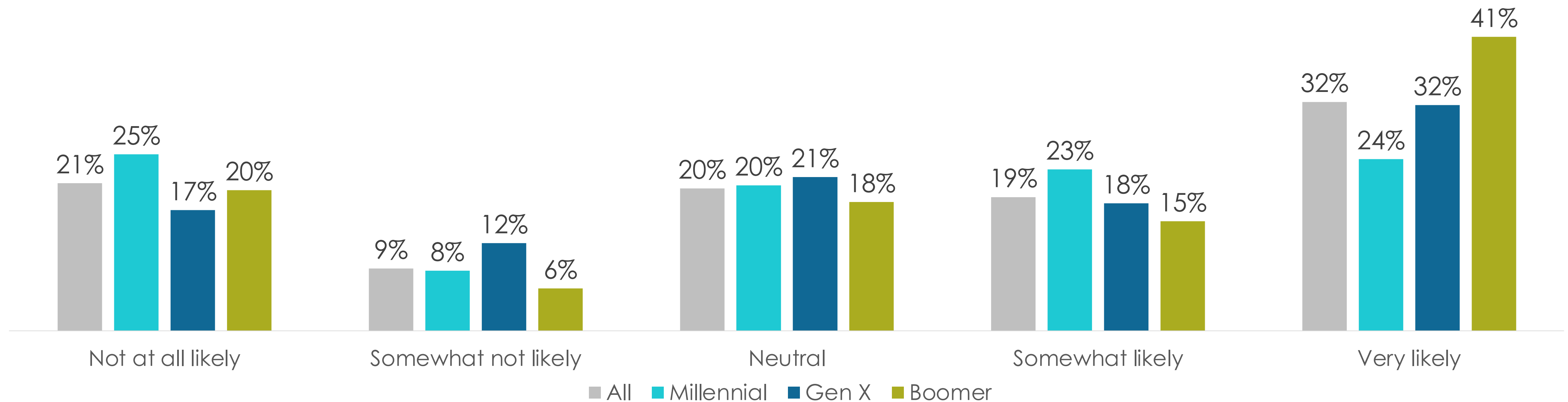
Women are much more realistic than men, with more than one-third (36%) not expecting a vaccine to be available to them before May 1st.

Expected date for vaccine to be available



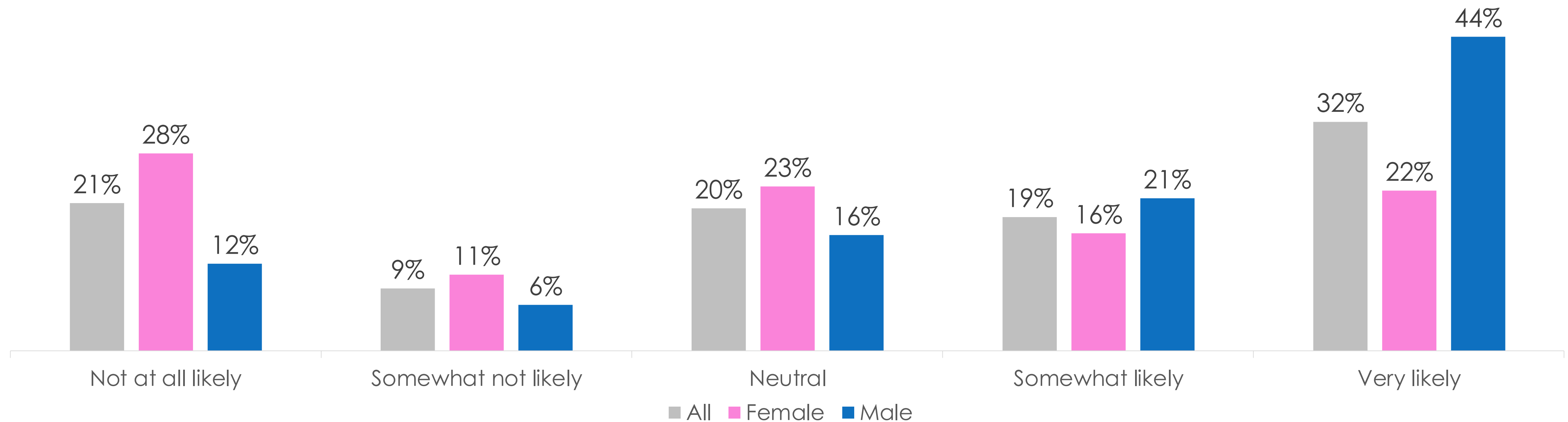
People remain skeptical about the vaccine. Only 51% of respondents are likely or very likely to get the vaccine when they have the opportunity.

Likelihood of getting COVID-19 vaccine



Men (65%) are much more likely to get the vaccine than women (38%).

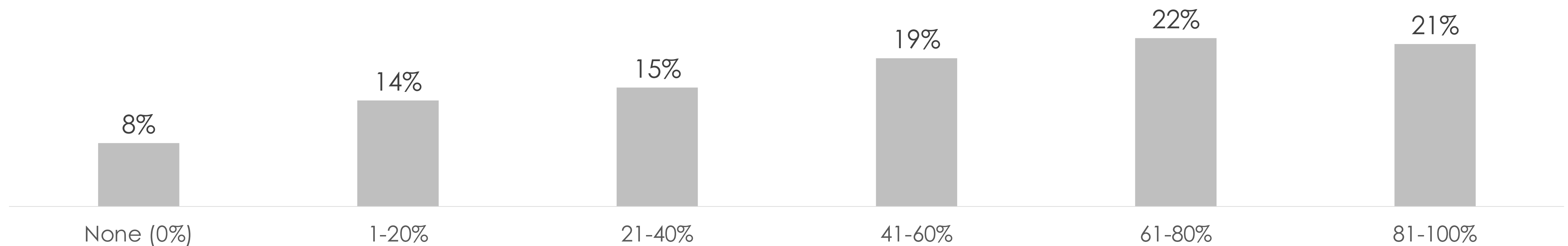
Likelihood of getting COVID-19 vaccine



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

Respondents' expectations of others largely reflect their own attitudes. Only 43% feel that more than 60% of their family and friends will get the vaccine.

% Of friends/family that will get the COVID-19 vaccine



What % of your friends and family do you think will get vaccinated when they have the opportunity?

Summary

Holiday Shopping

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 - The remainder of the weekend did not fare much better as only 26% of respondents were in stores Saturday and/or Sunday of Thanksgiving weekend.
 - Only two-thirds of respondents were satisfied with the safety precautions (masks, social distancing, etc.) of the other shoppers they encountered over the holiday weekend.
- Compared to the limited number of people who were in the stores, more than half (52%) of respondents report having done online shopping Thanksgiving weekend.
- 20% of respondents report they've completed their holiday shopping. Of the remaining 80%, half will return to the stores.
 - 16% of the 40% planning to go back in-store would prefer not to.
- In addition to the 39% of people that will complete their shopping online, many of those planning in-store visits will also be shopping online. In total, consumers anticipate 62% of their remaining holiday shopping will be completed online.

Summary

Holiday Activity

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- Only 11% of respondents engaged in overnight travel over the Thanksgiving weekend. This is slightly less than half of the 26% of respondents who joined a group beyond those with whom they live.
 - Although airlines set pandemic-era records during the Thanksgiving holiday, the vast majority (79%) of those who traveled overnight at Thanksgiving did so by car.
- Despite the caution demonstrated, nearly one-quarter (23%) of respondents are concerned that their Thanksgiving behaviors increased the possibility that they were exposed to COVID.
- Behaviors during the December holidays are expected to mirror those at Thanksgiving. Only 31% plan to join gatherings with people beyond those with whom they live.
- Overnight travel may be more extensive over the December holidays. Compared to the 11% that did so at Thanksgiving, 10% are planning overnight travel in December, and another 8% are still considering it.
- Like Thanksgiving, traveling in December will still largely be done by car (72%) rather than public transportation (28%).

Summary

COVID-19 Hot Topics

- Given the most recent news on the availability of COVID-19 vaccines, it appears a significant portion of the 25% of people who expect a vaccine to be available for them by February 1st will be disappointed.
- Women are much more realistic than men, with more than one-third (36%) not expecting a vaccine will be available to them before May 1st.
- People remain skeptical about the vaccine. Only 51% of respondents are likely or very likely to get the vaccine when they have the opportunity.
 - Men (65%) are much more likely to get the vaccine than women (38%).
- Respondents' expectations of others largely reflect their own attitudes. Only 43% feel that more than 60% of their family and friends will get the vaccine.