



COVID-19 U.S. CONSUMER IMPACT TRACKING STUDY – WEEK 40

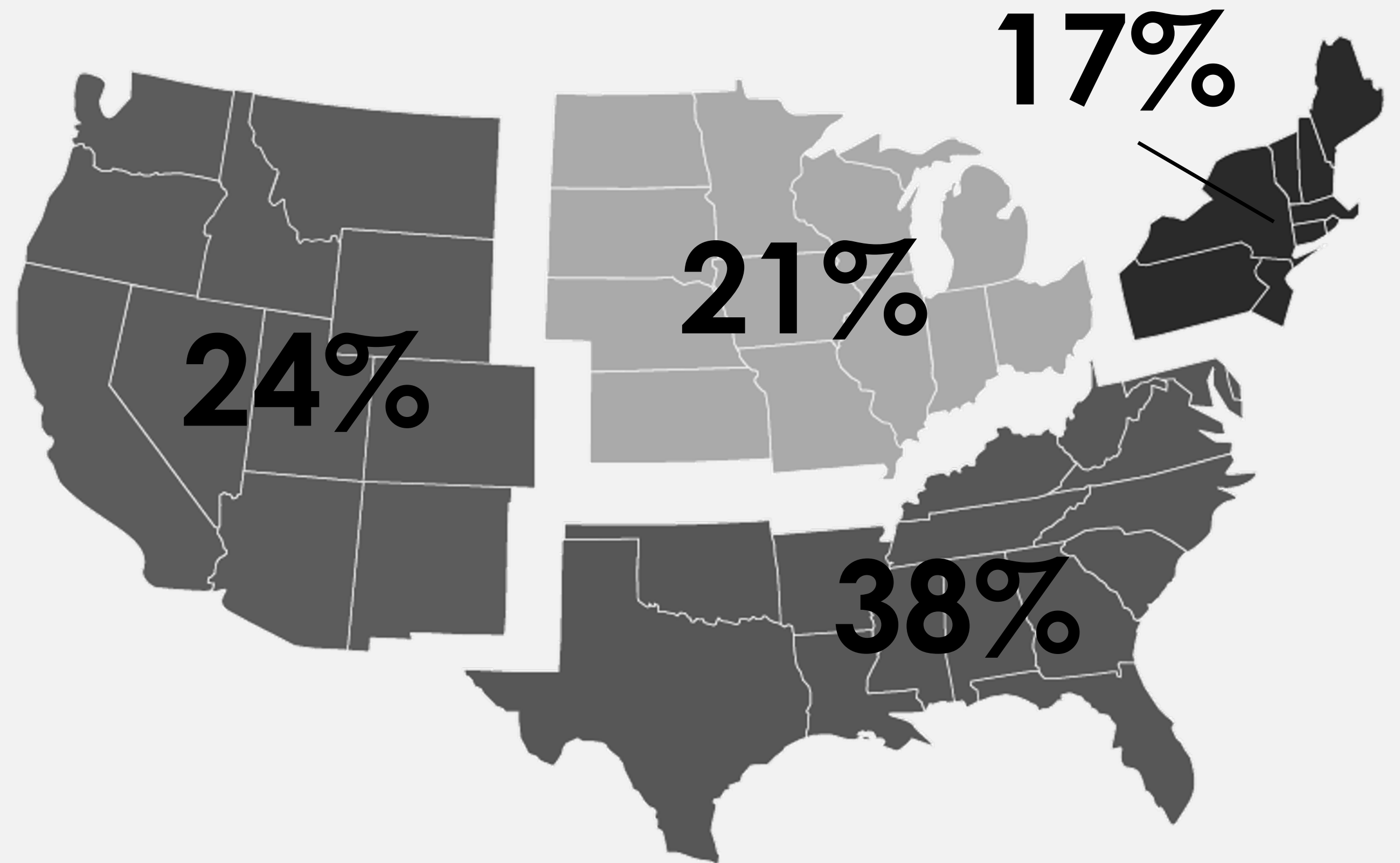
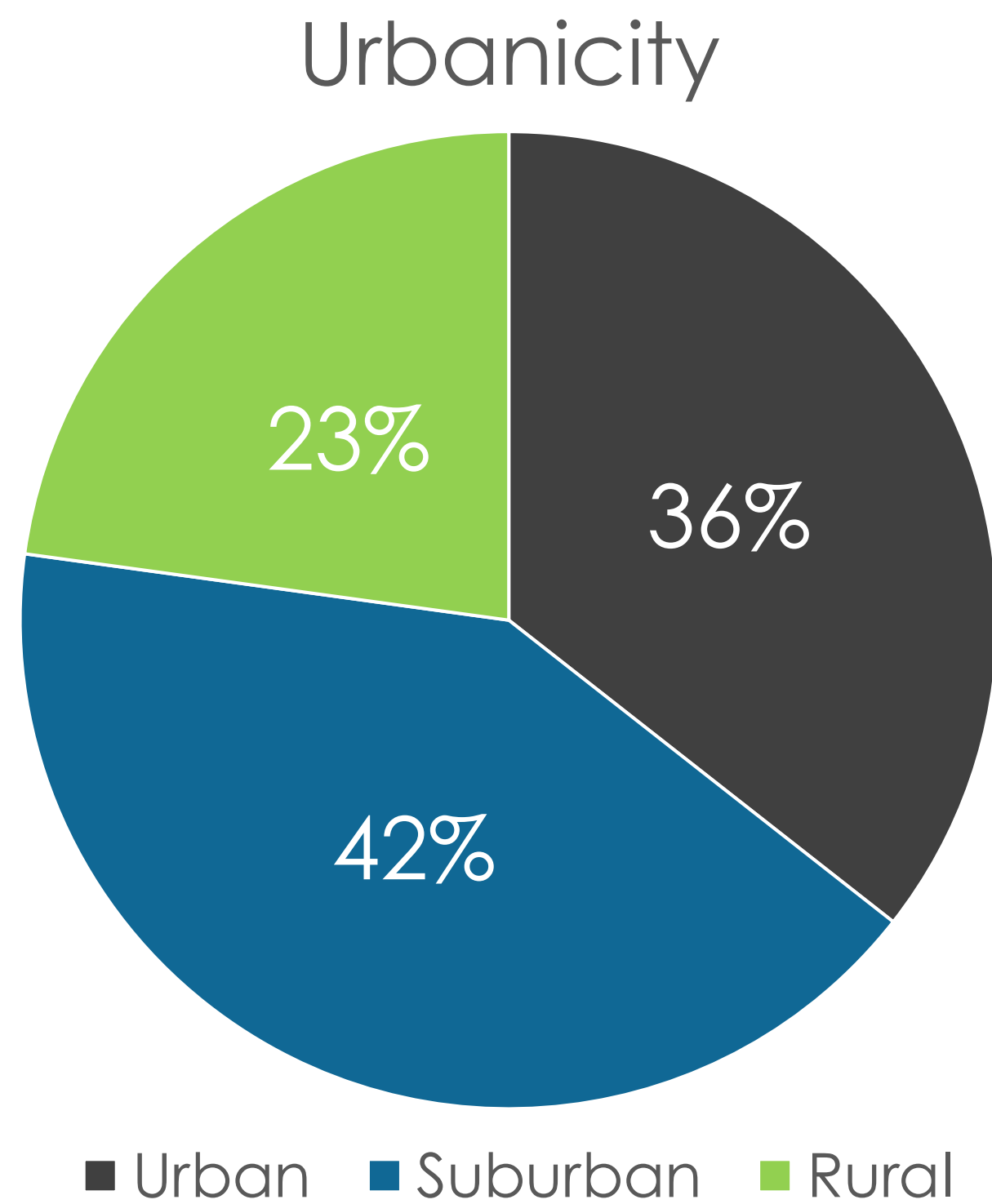
PRESENTED DECEMBER 14, 2020

Methodology

- N = 583
- MOE = $\pm 4.06\%$
- Panel: General Population
- Collected: 12/10/20, 12/11/20

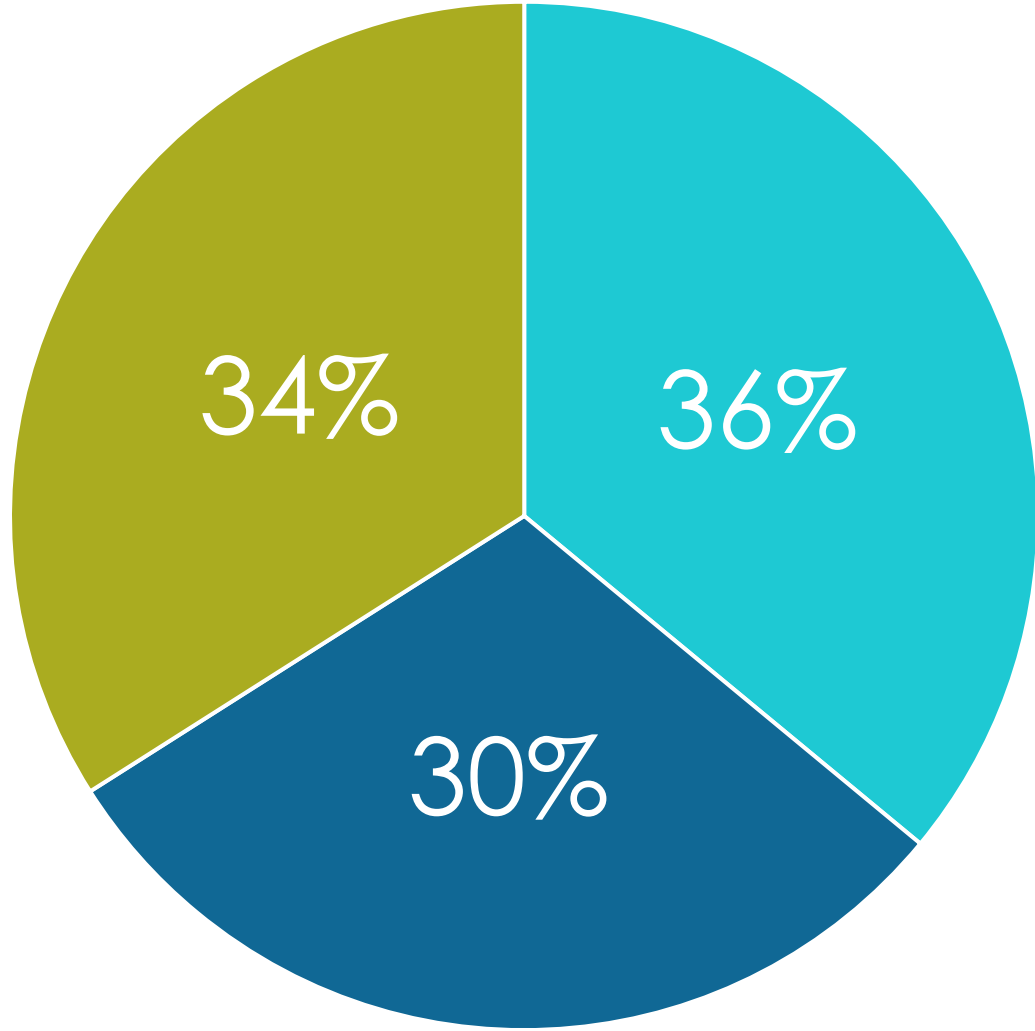


Panel Composition



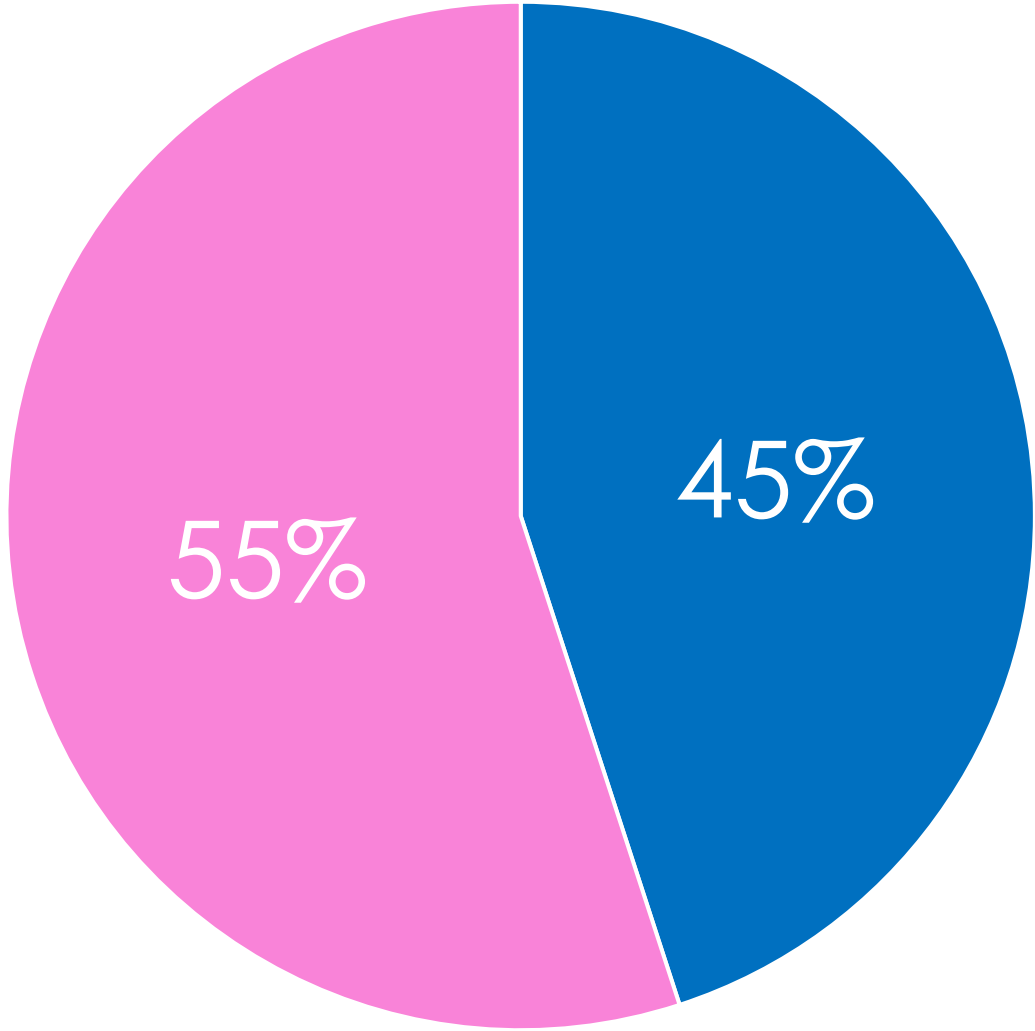


Generation



■ Millennial ■ Gen X ■ Boomer

Gender



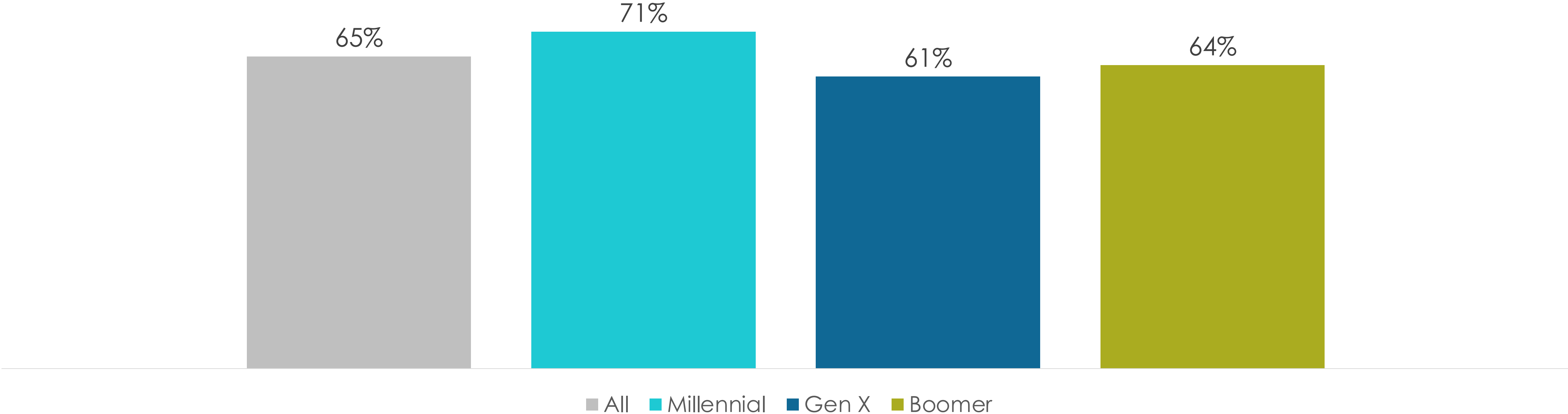
■ Male ■ Female

Travel



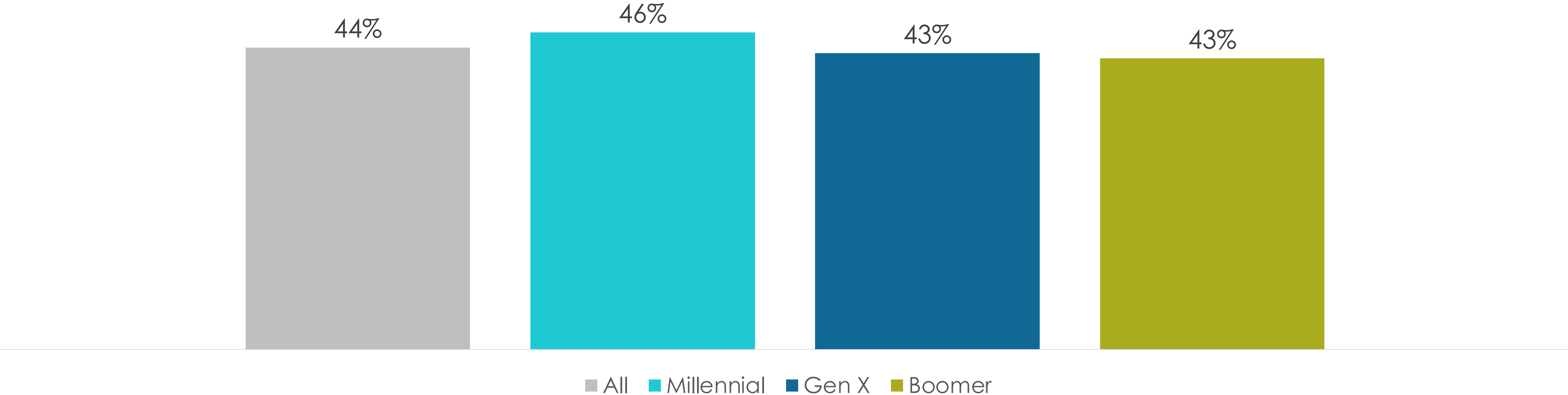
Nearly two-thirds (65%) of respondents have had to cancel personal travel plans as a result of COVID-19.

% Who have cancelled personal travel in the last 10 months due to COVID-19



Among those who have cancelled plans, 44% have money saved or travel credits at their disposal.

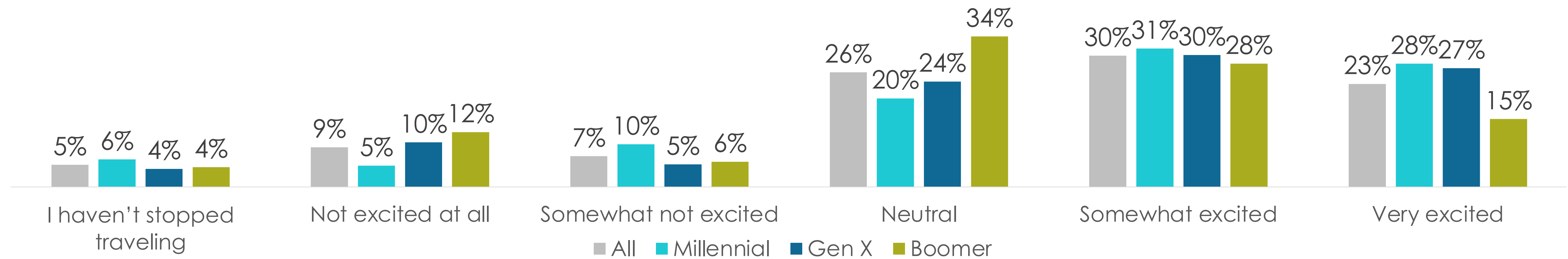
% Who have money saved or travel credits to use when travel is safer



Do you have money that you've saved to travel or credit with an airline, hotel, cruise line etc. that you can use when travel is safer?

More than half the respondents (53%) are somewhat or very excited to start traveling again.

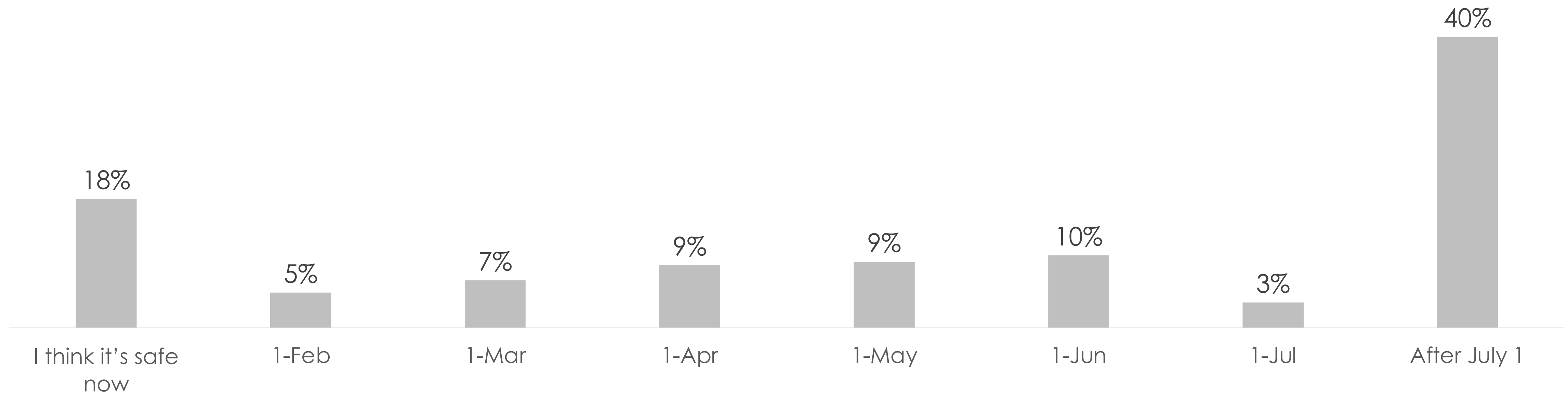
Excitement to travel again



How excited are you for the opportunity to travel again?

Despite the enthusiasm to travel again, the majority (53%) don't feel the opportunity will present itself until the 1st of June or beyond.

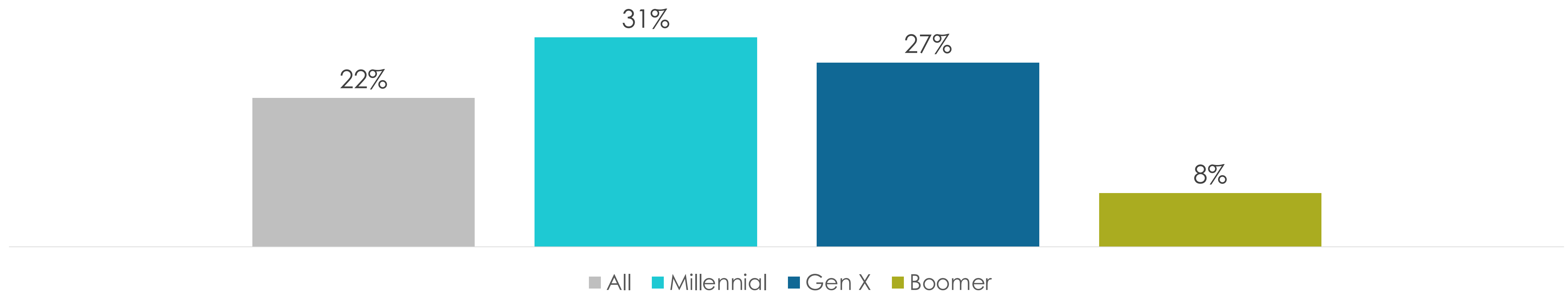
When it will be safe to travel again



When do you think it will be safe for you to do personal travel?

Fewer than one-quarter (22%) of respondents have booked any personal travel for 2021.

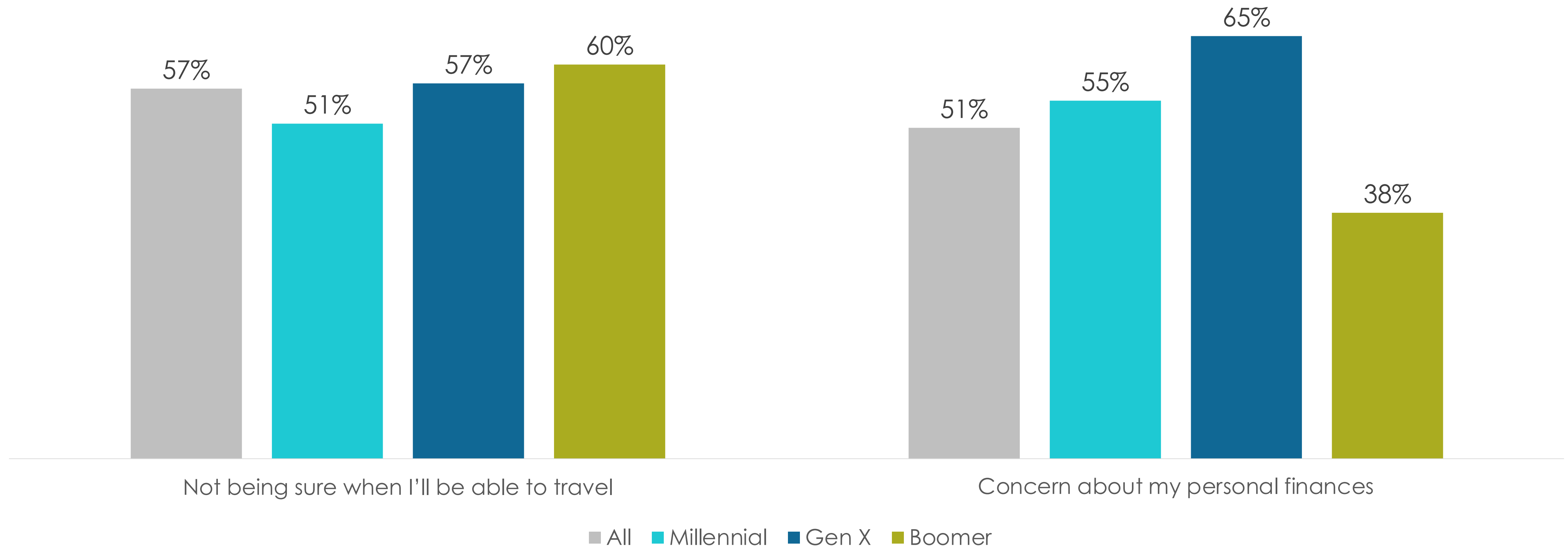
% Who have made travel plans for 2021



Have you made travel plans (booked tickets, lodging, etc.) for 2021?

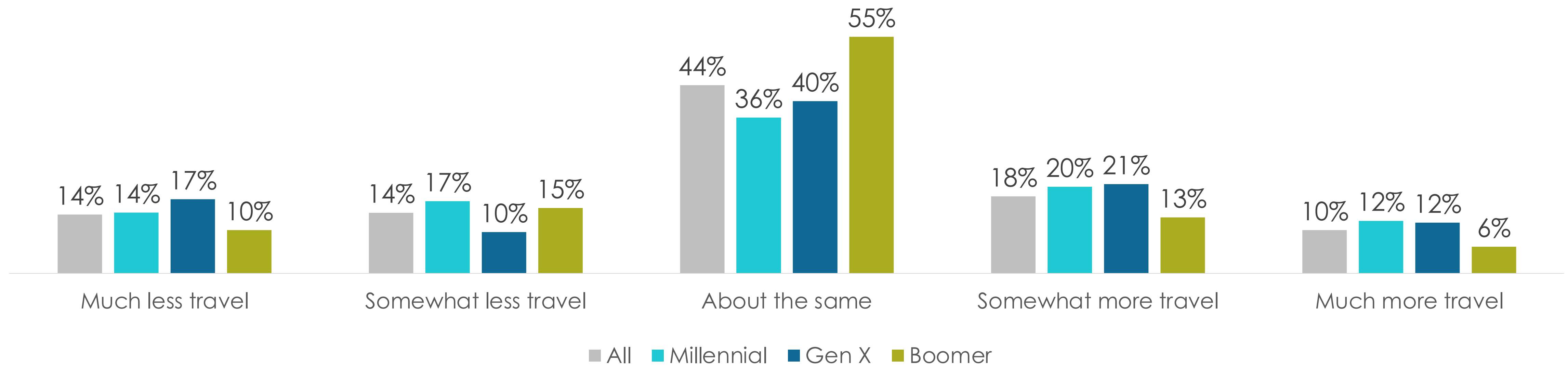
The two primary reasons for not yet booking travel are the uncertainty regarding when it will be safe (57%) and a continuing concern about personal finances (51%).

Influence on not making travel plans for 2021



The good news is that people think their travel in the back half of 2021 will look very much like it did in the 2nd half of 2019. As many people think they'll travel more as those who think they will travel less (28%).

Personal travel in 2nd half of 2021 vs. In 2nd half of 2019



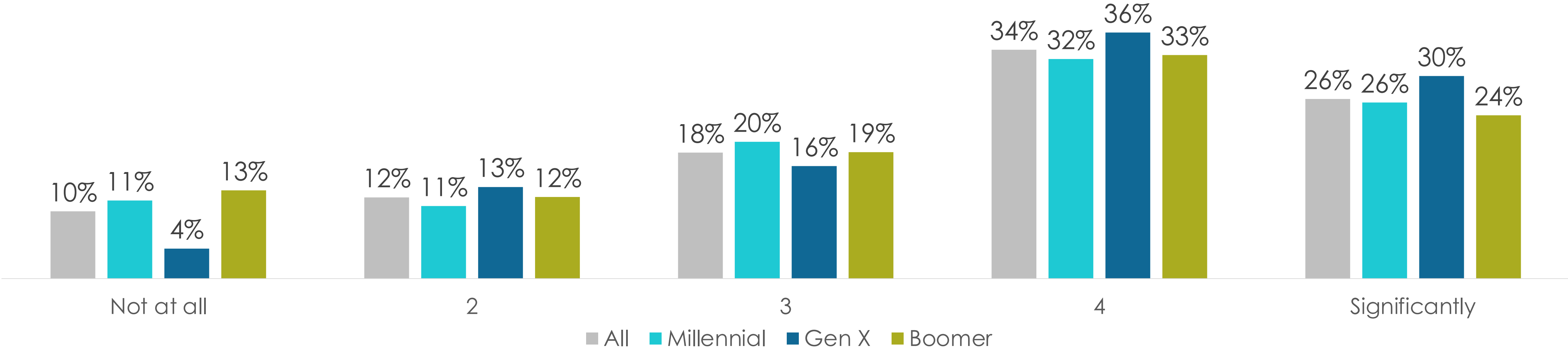
How will your personal travel in the second half of 2021 compare to the travel you did in the second half of 2019 before COVID?



Shopping Behavior

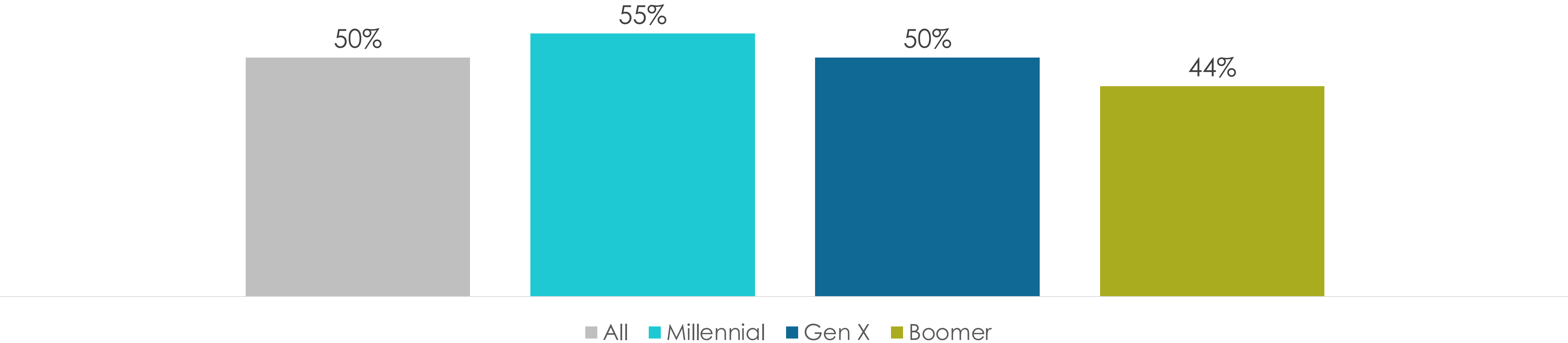
60% of respondents report that their shopping behavior has changed substantially as a result of COVID-19.

Change in shopping behavior as a result of COVID-19



For the average respondent, 50% of the shopping they have traditionally done in-store is now being done online. Even Boomers (44%) have changed their behavior.

In-store shopping that has moved online

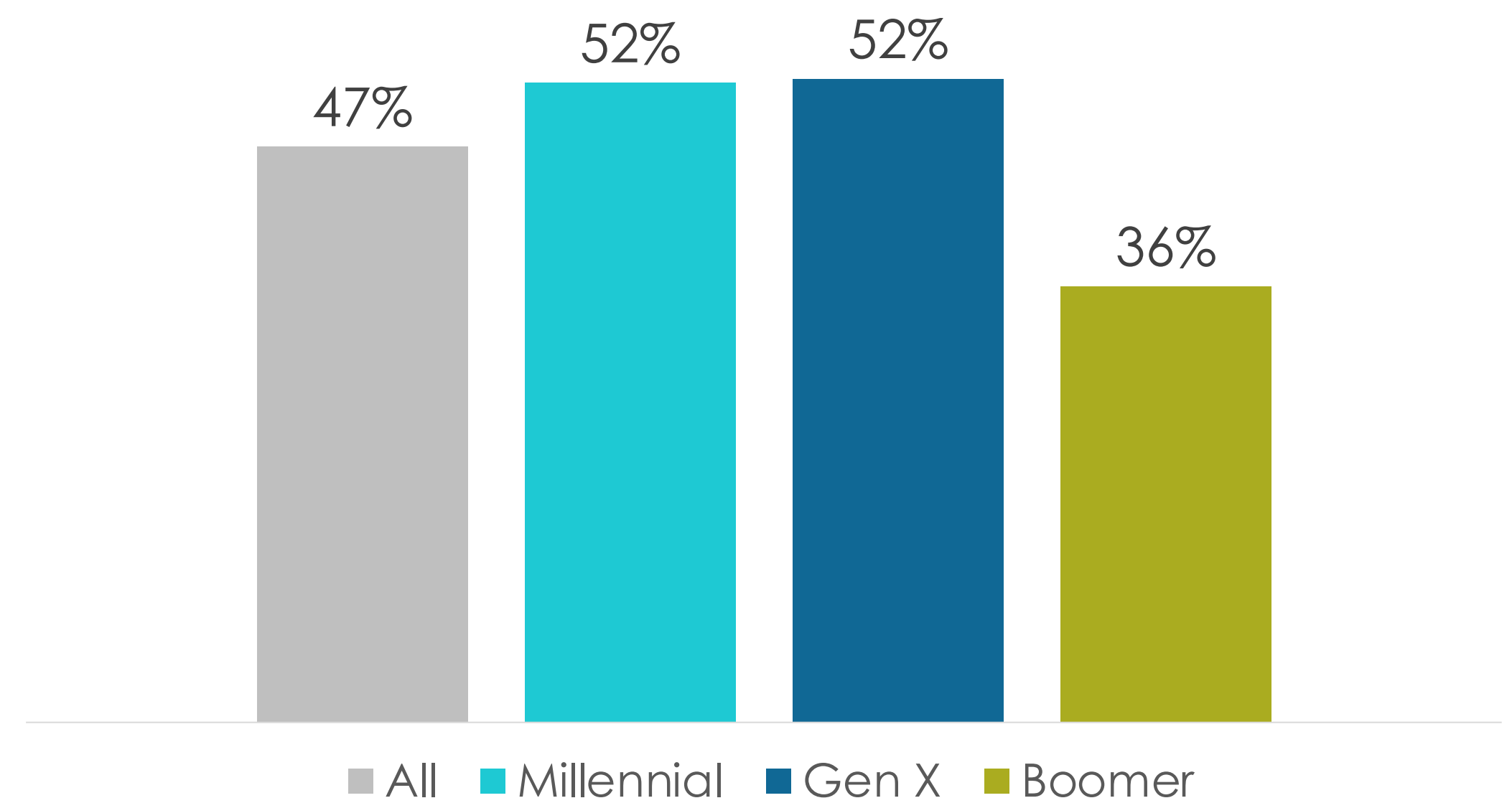


Think about the in-store shopping you did prior to COVID-19. What percent of that shopping are you doing online now, and what percent are you continuing to do in-store? Total must equal 100%.



Among those who've moved some or all of their shopping online, nearly half (47%) miss the shopping they used to do in-store.

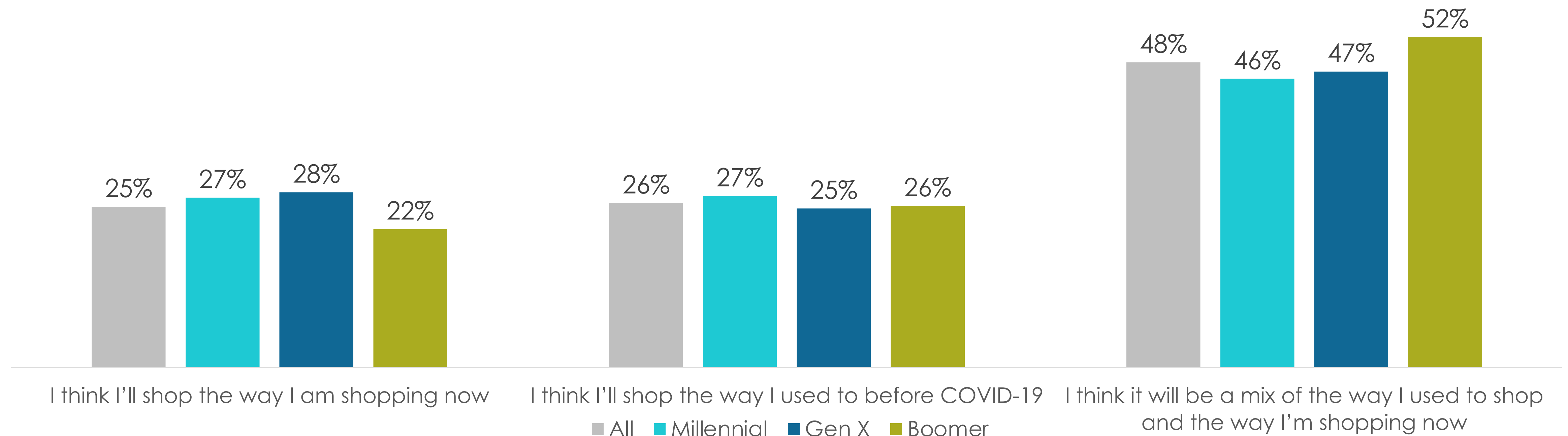
% Who miss shopping in-store



How much do you miss the shopping you used to do in-store?

People plan to maintain some or all of their new shopping behaviors in a post-COVID world. Only 1 in 4 believe they'll revert to their pre-COVID behaviors.

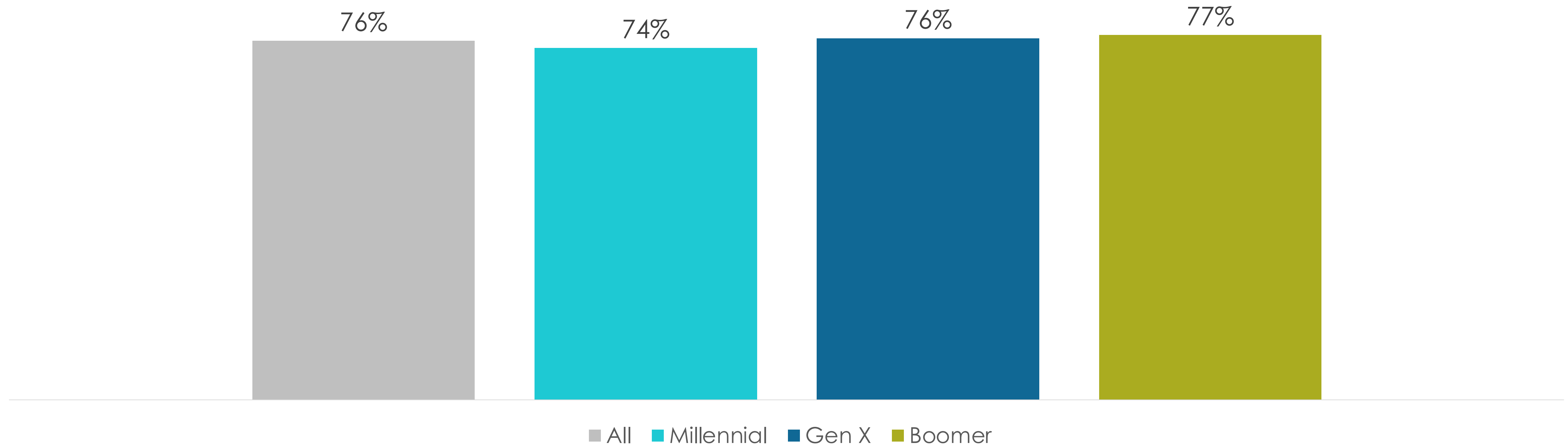
Shopping behaviors once COVID-19 is brought under control



Which of the following best describes how you think your shopping behavior will be after COVID-19 is brought under control?

Where they buy is not the only change shoppers are making. As a result of product shortages, 76% of people have had to buy substitutes for their preferred brands.

% Who have had to buy substitute brands due to shortage of desired brands

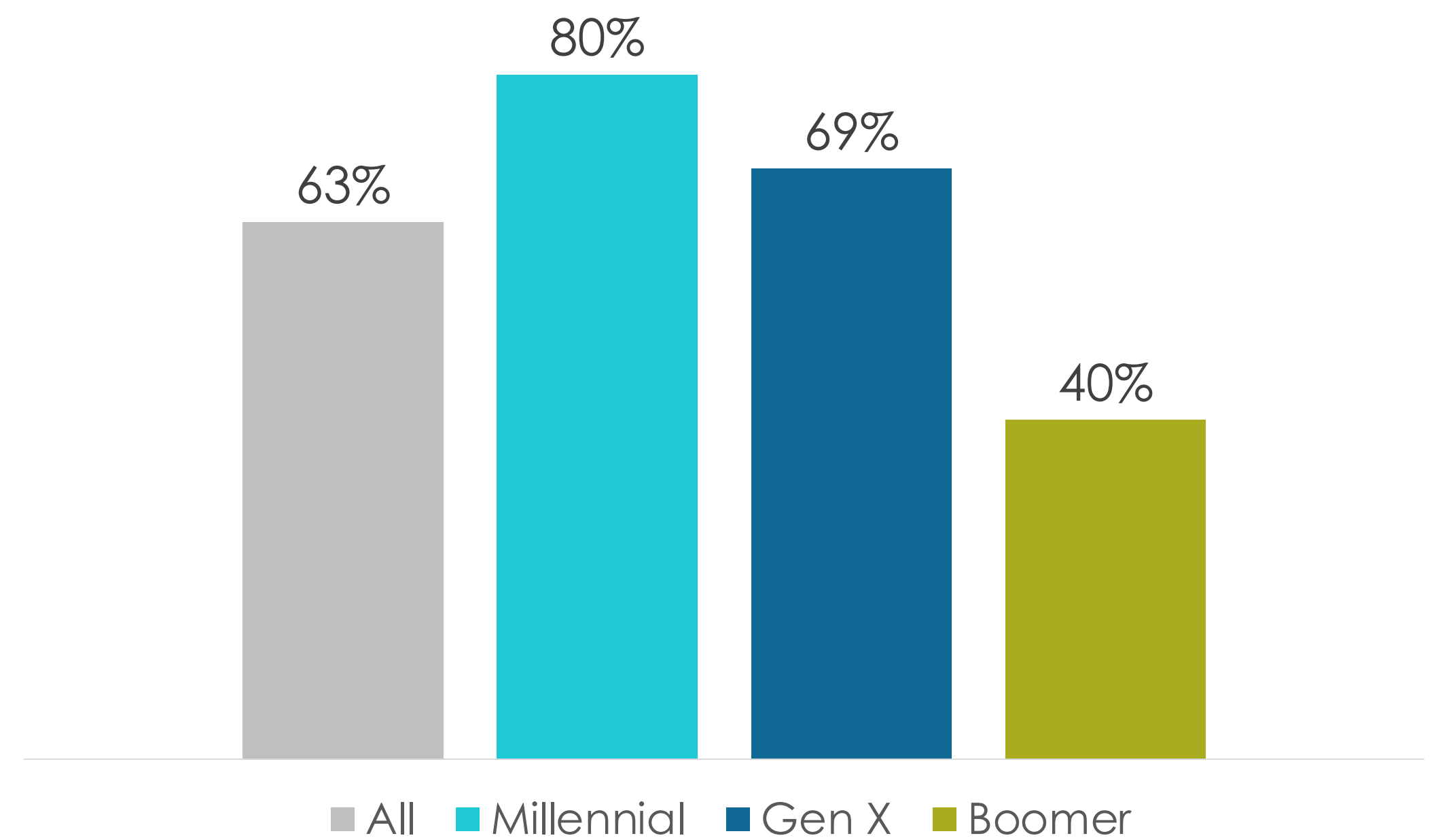


As a result of COVID-19, many stores have experienced out-of-stocks on products and brands. Have you had to buy substitute brands as a result of the product/brand you want being unavailable?



Among the three-quarters of respondents who have been forced to try new brands, 63% have discovered brands they prefer.

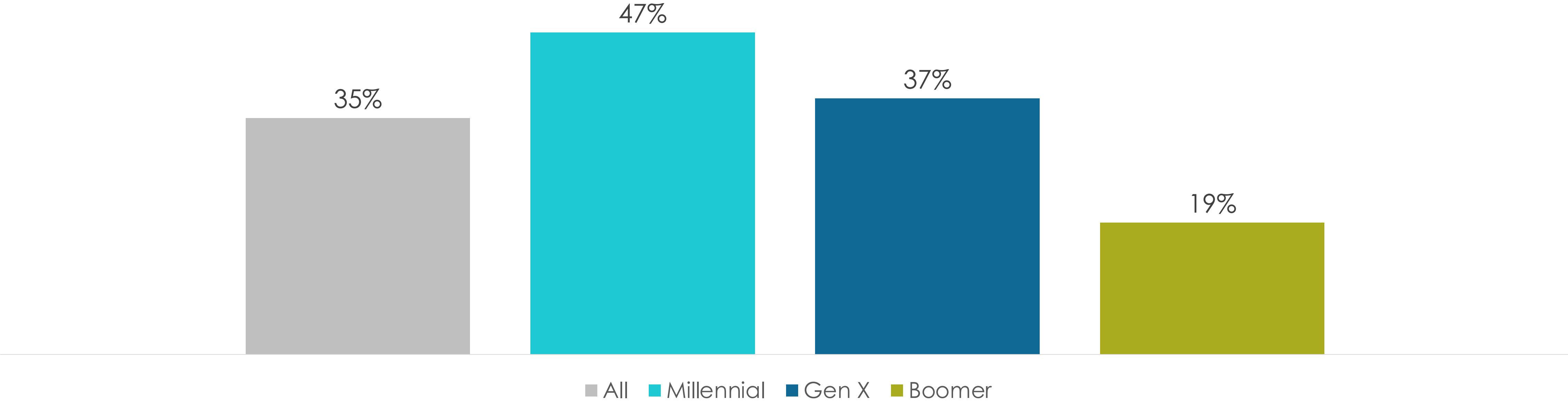
% Who have discovered substitute items that are preferred



As a result of the need to purchase substitute products/brands, have you discovered items you like and will continue to buy in the future?

The success they've experienced with new brands has led 35% of respondents to be more open to trying other brands in the future.

% Who are more likely to try substitute brands in the future



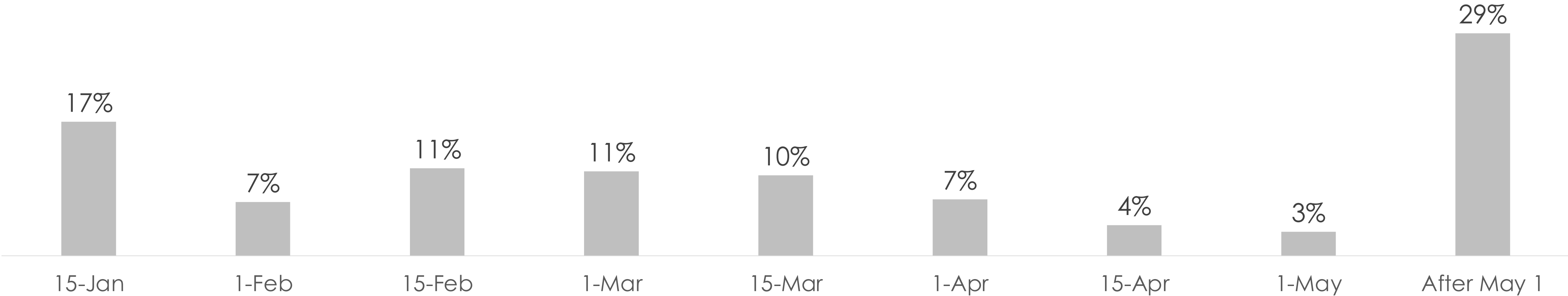
How much more or less likely has the need to try substitute brands made you to consider alternate brands in the future?



COVID-19 Hot Topics

The expectations for the availability of a COVID-19 vaccine remain largely unchanged over the past few weeks.

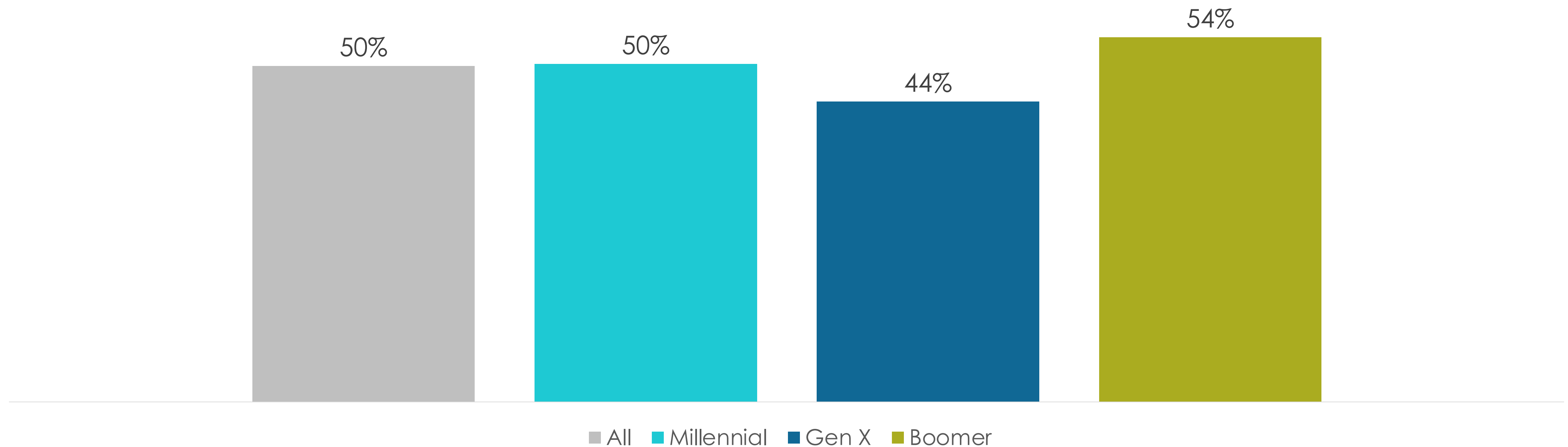
Expected date for vaccine to be available



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

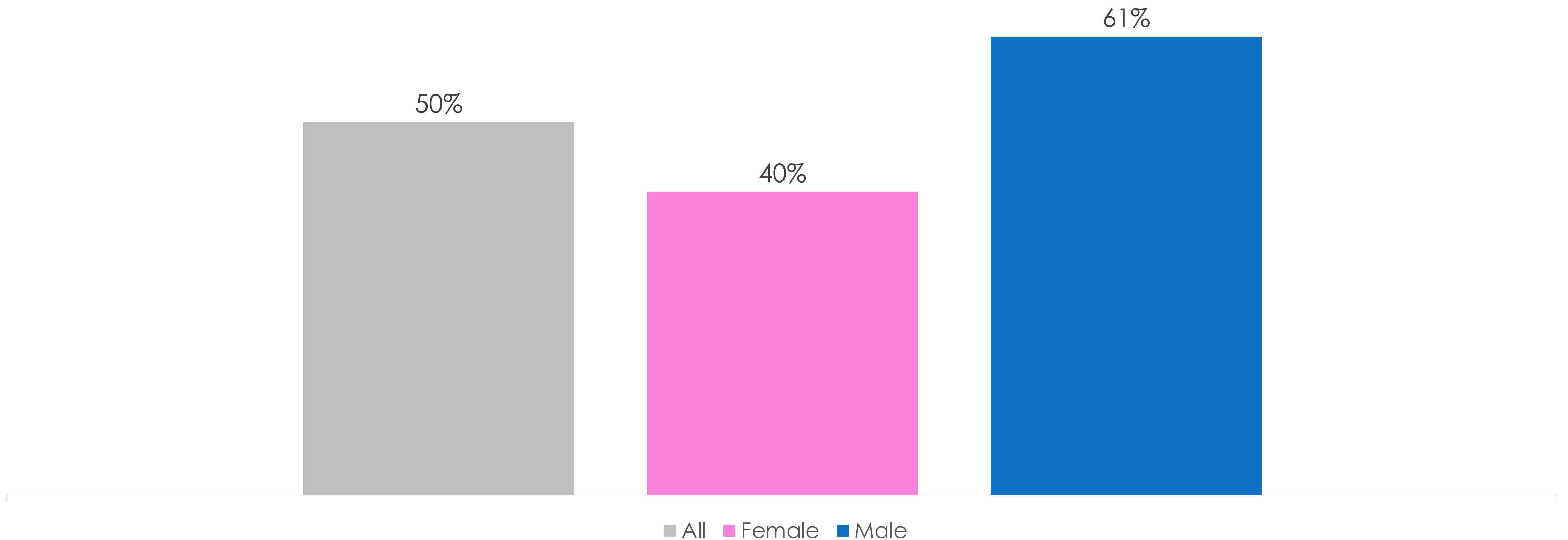
The likelihood to get the vaccine continues to hover around the 50% mark.

% Likely to get COVID-19 vaccine



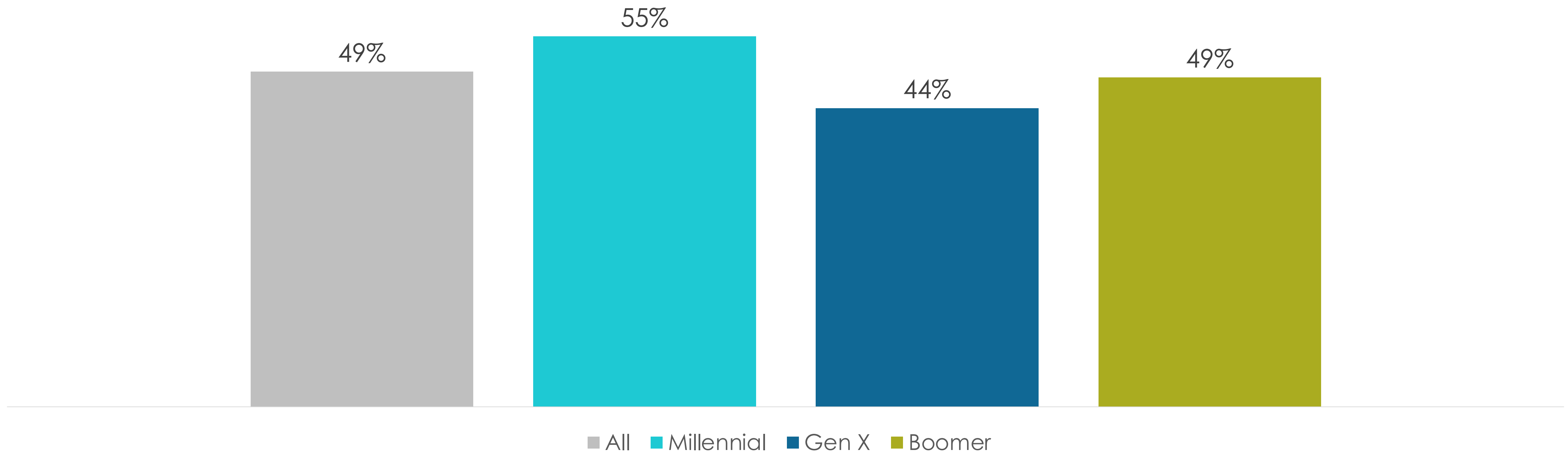
Males (61%) are more than half again as likely to get the vaccine as females (40%).

% Likely to get COVID-19 vaccine



Given the number of people willing to get the vaccine, it's not surprising that only 49% feel employers should make the vaccine mandatory for their workers.

% Who think should employers require COVID-19 vaccines



Should employers have the right to require employees to get a COVID-19 vaccine unless they have a medical or religious exemption?

Summary

Travel

- Nearly two-thirds (65%) of respondents have had to cancel personal travel plans as a result of COVID-19.
 - Among those who have canceled plans, 44% have money saved or travel credits at their disposal for future travel.
- More than half the respondents (53%) are somewhat or very excited to start traveling again.
- Despite the enthusiasm to travel again, the majority (53%) don't feel the opportunity to do so will present itself until the 1st of June or beyond.
- Fewer than one-quarter (22%) of respondents have booked any personal travel for 2021.
 - The two primary reasons for not yet booking travel are the uncertainty regarding when it will be safe (57%) and continuing concern about personal finances (51%).
- The good news is that people think their travel in the back half of 2021 will look very much like it did in the 2nd half of 2019.
 - As many people think they'll travel more as those who think they will travel less (28%).

Shopping Behavior

- 60% of respondents report that their shopping behavior has changed substantially as a result of COVID-19.

Summary - Continued

- For the average respondent, 50% of the shopping they have traditionally done in-store is now being done online.
 - Even Boomers (44%) have moved much of their in-store shopping to online.
- Among those who've moved some or all of their shopping online, nearly half (47%) miss the shopping they used to do in stores.
- People plan to maintain some (48%) or all (25%) of their new shopping behaviors in a post-COVID world.
 - Only 1 in 4 believe they'll revert to their pre-COVID behaviors.
- Where they buy is not the only change shoppers are making. As a result of product shortages, 76% of people have had to buy substitutes for their preferred brands.
- Among the three-quarters of respondents who have been forced to try new brands, 63% have discovered brands they prefer.
- The success they've experienced with new brands has led 35% of respondents to be more open to trying other brands in the future.

Summary - Continued

COVID-19 Hot Topics

- Respondents' expectation of when the COVID-19 vaccine will be available to them has remained largely unchanged over the past few weeks.
- Likelihood to get the vaccine continues to hover around the 50% mark.
- Males (61%) are more than half again as likely to get the vaccine as females (40%).
- Given the number of people willing to get the vaccine, it's not surprising that only 49% feel employers should make the vaccine mandatory for their workers.