



COVID-19 U.S. CONSUMER IMPACT TRACKING STUDY – WEEK 41

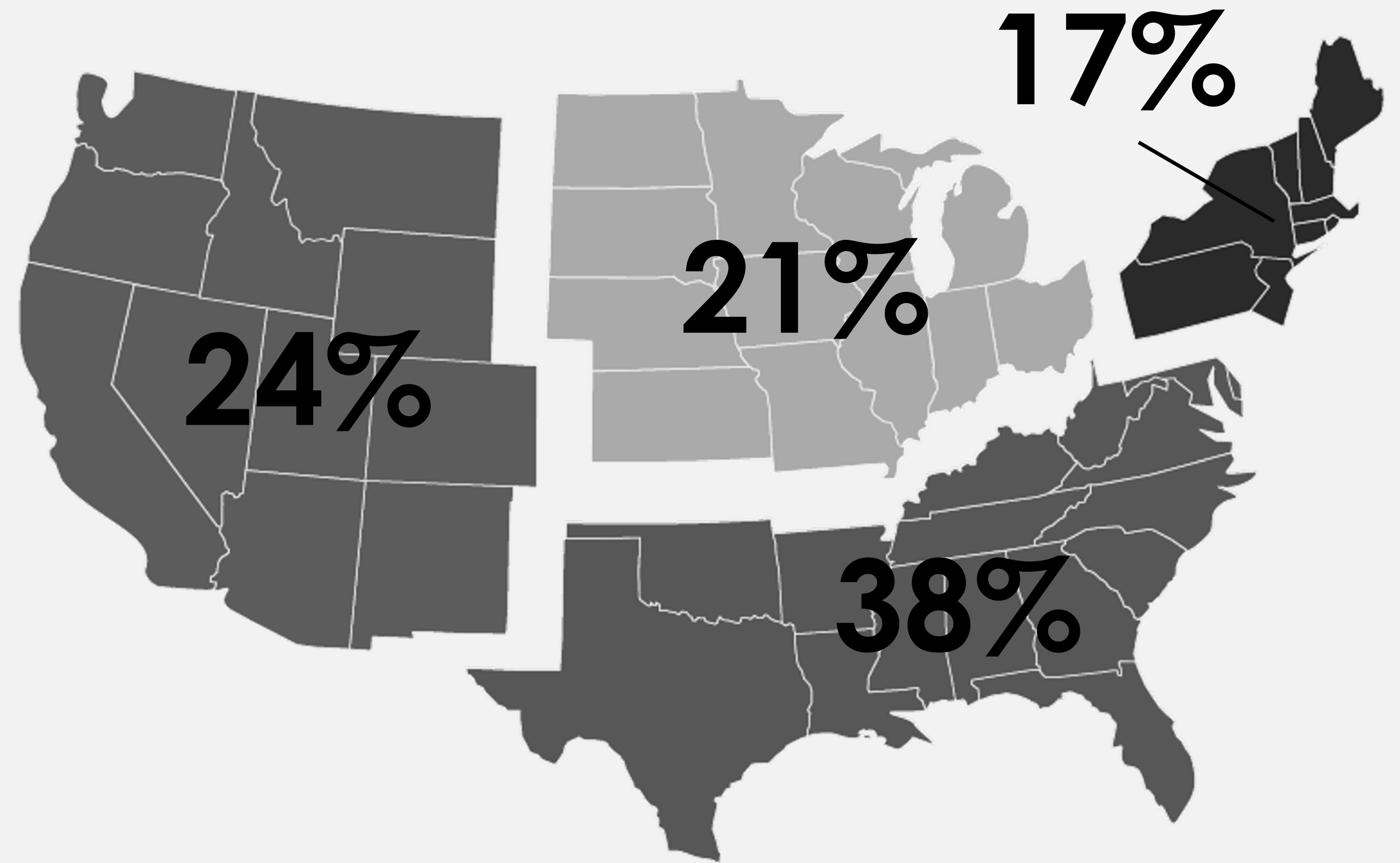
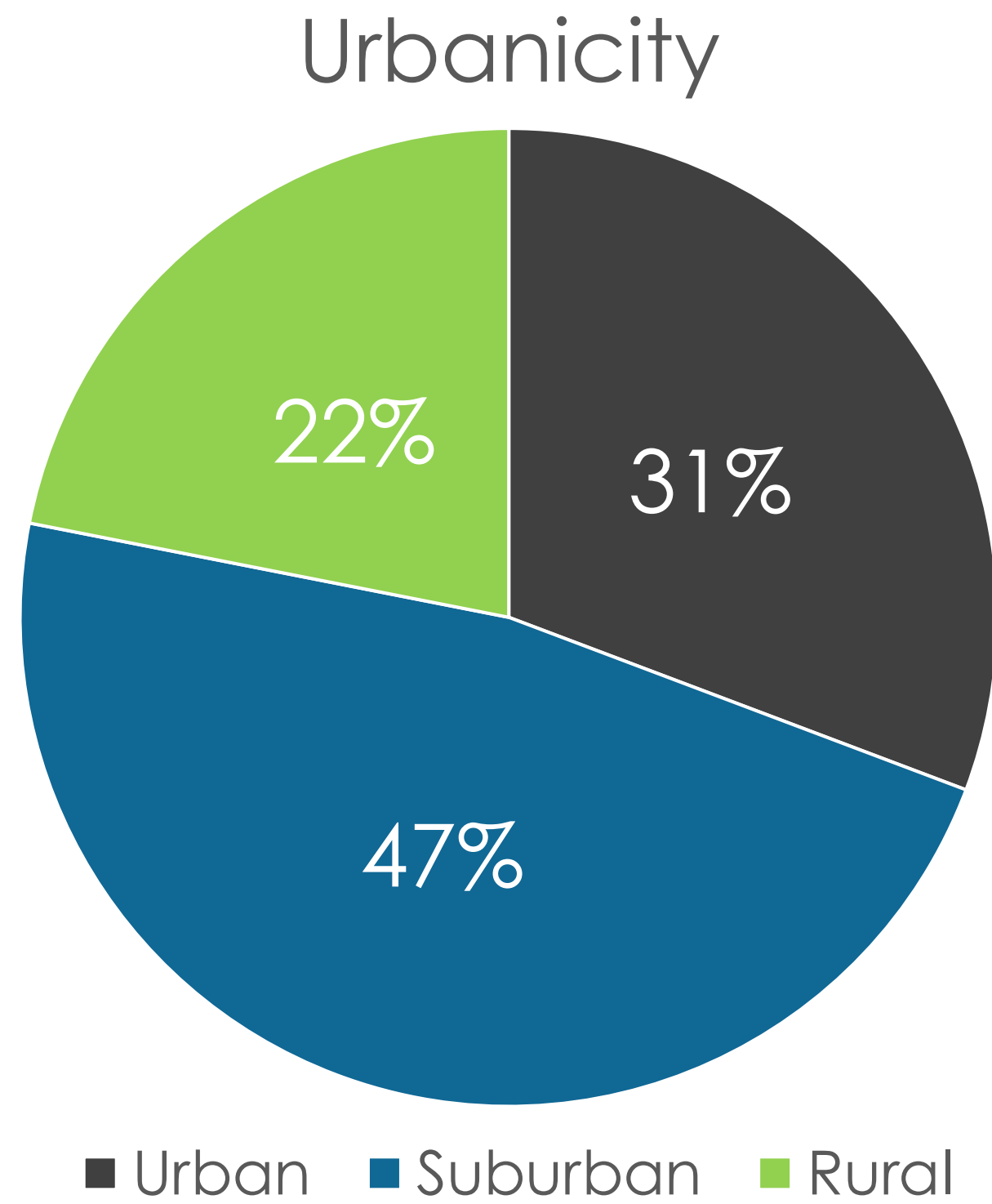
PRESENTED DECEMBER 21, 2020

Methodology

- N = 693
- MOE \pm 3.72%
- Panel: General Population
- Collected: 12/17/20, 12/18/20

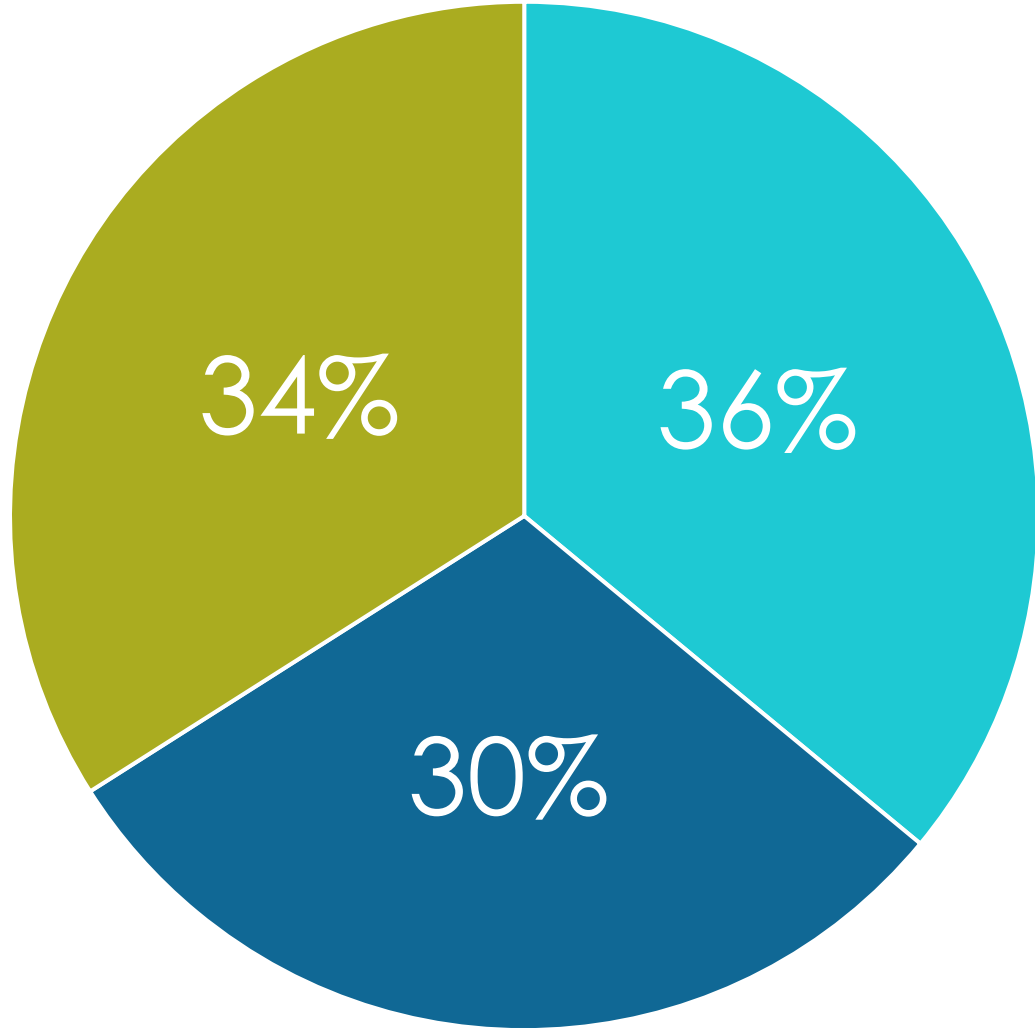


Panel Composition



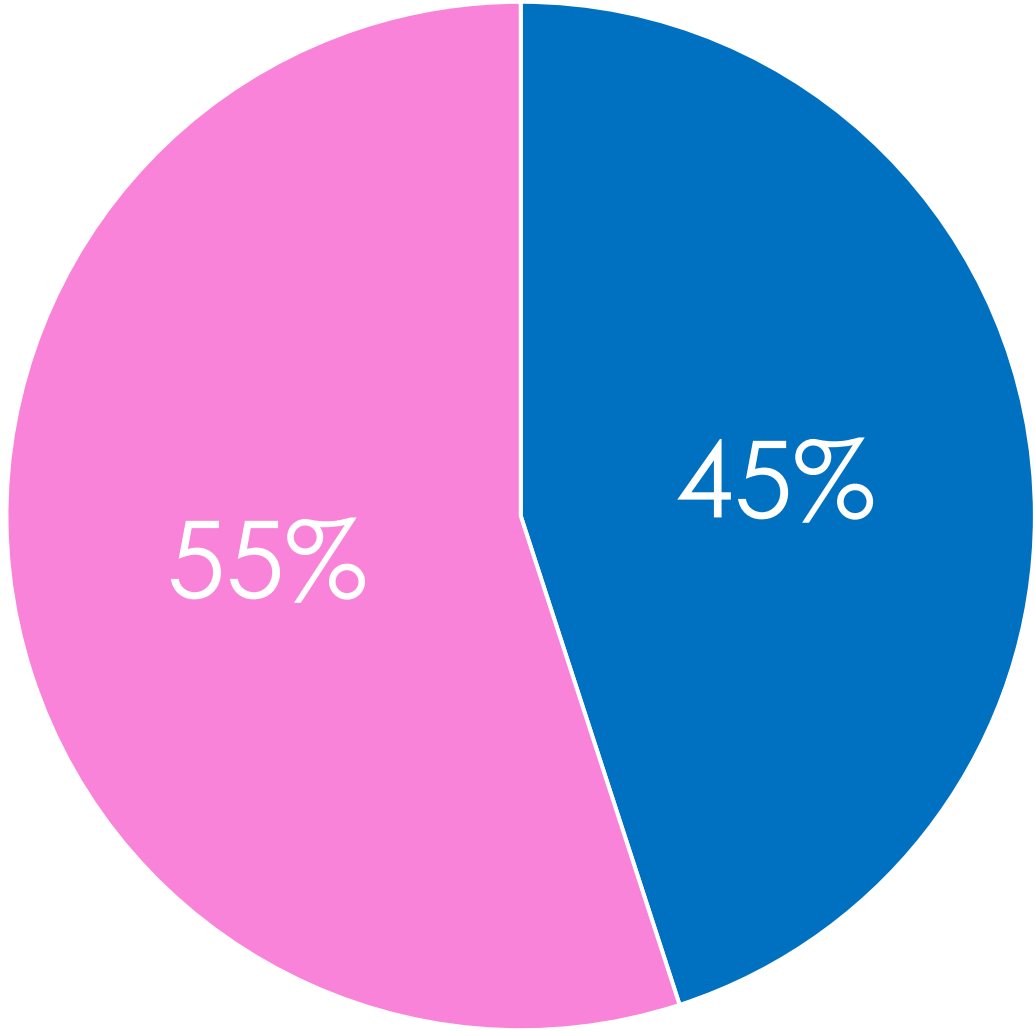


Generation



■ Millennial ■ Gen X ■ Boomer

Gender



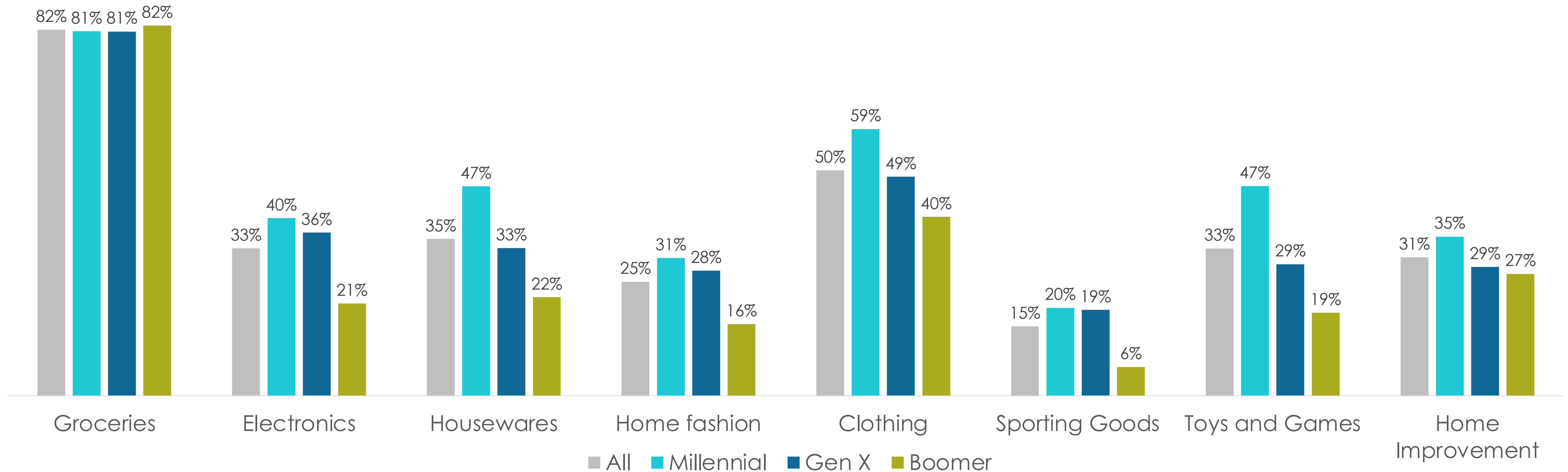
■ Male ■ Female

While total retail sales in the U.S. have largely floundered this year, Walmart has proven to be highly resilient. This week's survey focuses in part on what's been happening at Walmart and what it means for the future.



Of the 88% of respondents who have shopped in a Walmart store or at Walmart.com in the past 6 months, groceries (82%) are far and away the most popular category. Interestingly, engagement in every other category measured is led by Millennials.

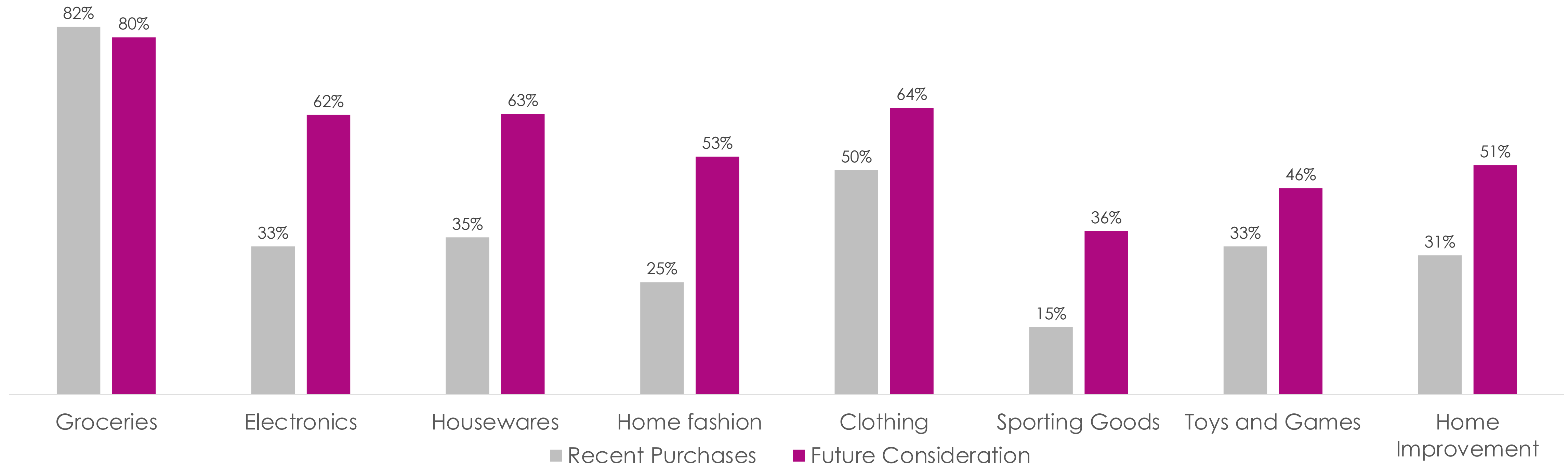
Categories people purchased at Walmart/Walmart.com in the last 6 months



In which of the following product categories have you made purchases from a Walmart or Walmart.com in the past 6 months?

Walmart's future also looks good as future purchase consideration in all categories except groceries is higher than past six months purchases.

Categories people would consider purchasing at Walmart/Walmart.com in the future

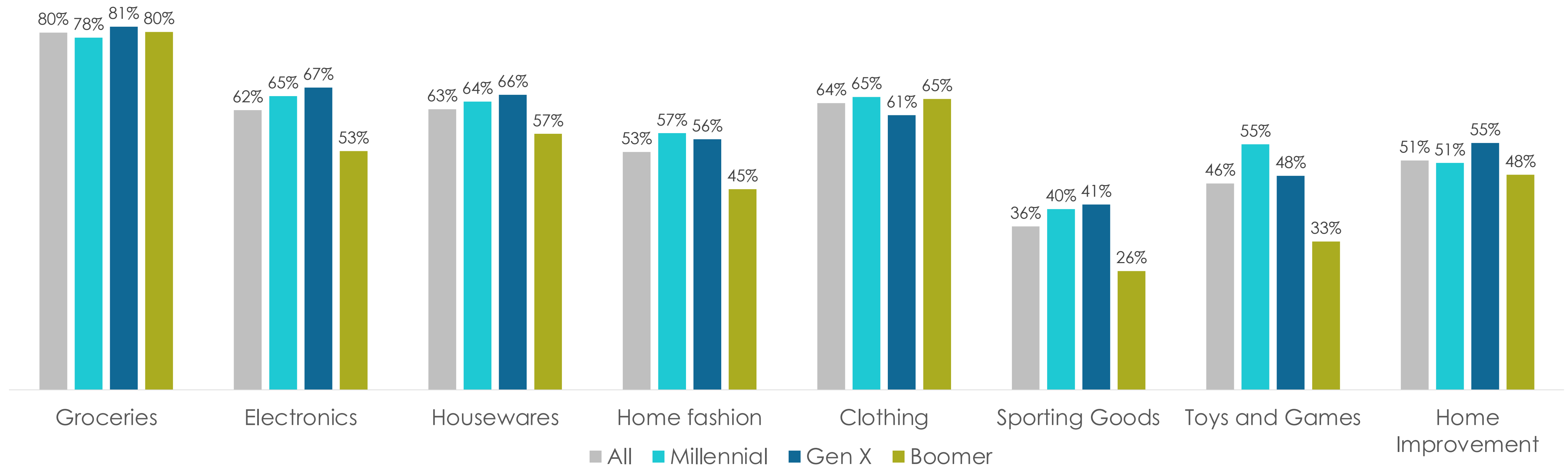


In which of the following product categories have you made purchases from a Walmart or Walmart.com in the past 6 months?

In which of the following categories would you consider making purchases from a Walmart or Walmart.com in the future?

The strength of future consideration among the younger generations is another positive as GenXers and Millennials will be the dominant force driving consumer spending in the near future.

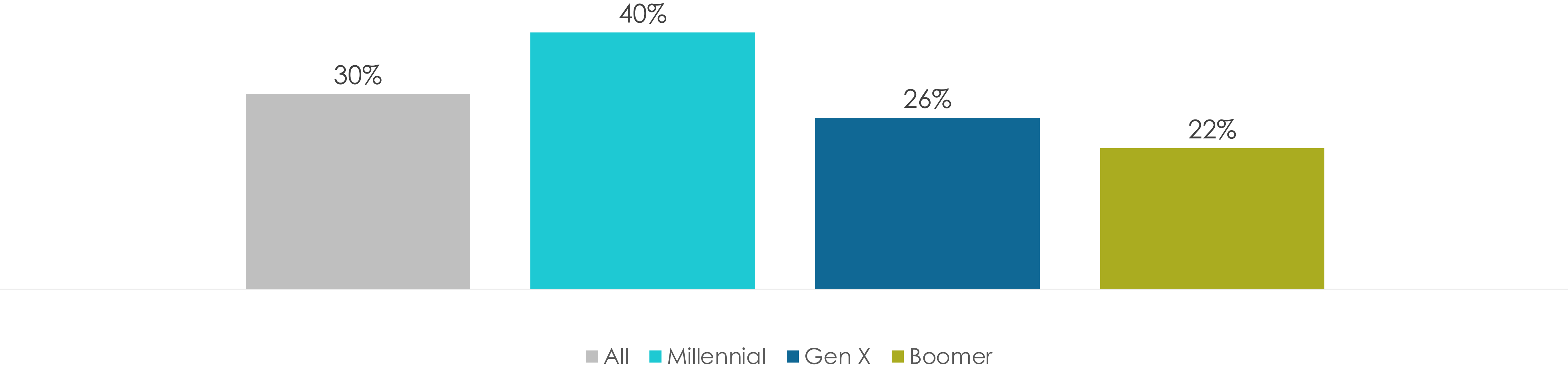
Categories people would consider purchasing at Walmart/Walmart.com in the future



In which of the following categories would you consider making purchases from a Walmart or Walmart.com in the future?

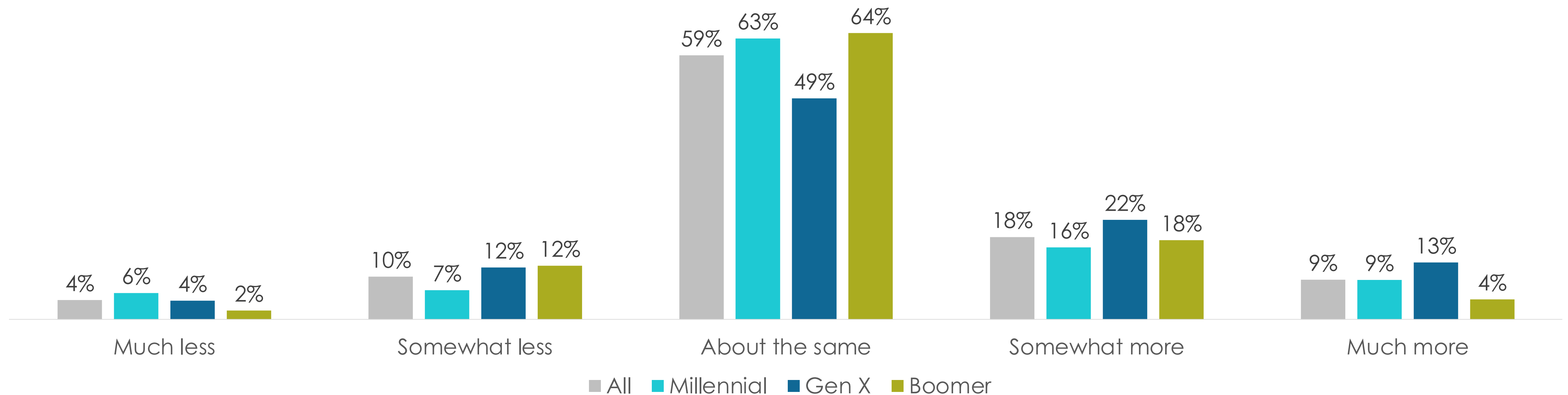
In fact, 30% of respondents – including 40% of Millennials – will consider making purchases from Walmart in categories they would not have considered pre-COVID.

% Who would consider purchasing in categories at Walmart/Walmart.com in the future that they would not have considered prior to COVID-19



27% of respondents anticipate doing more shopping in Walmart stores post-COVID than they did pre-COVID, while only 14% are likely to do less.

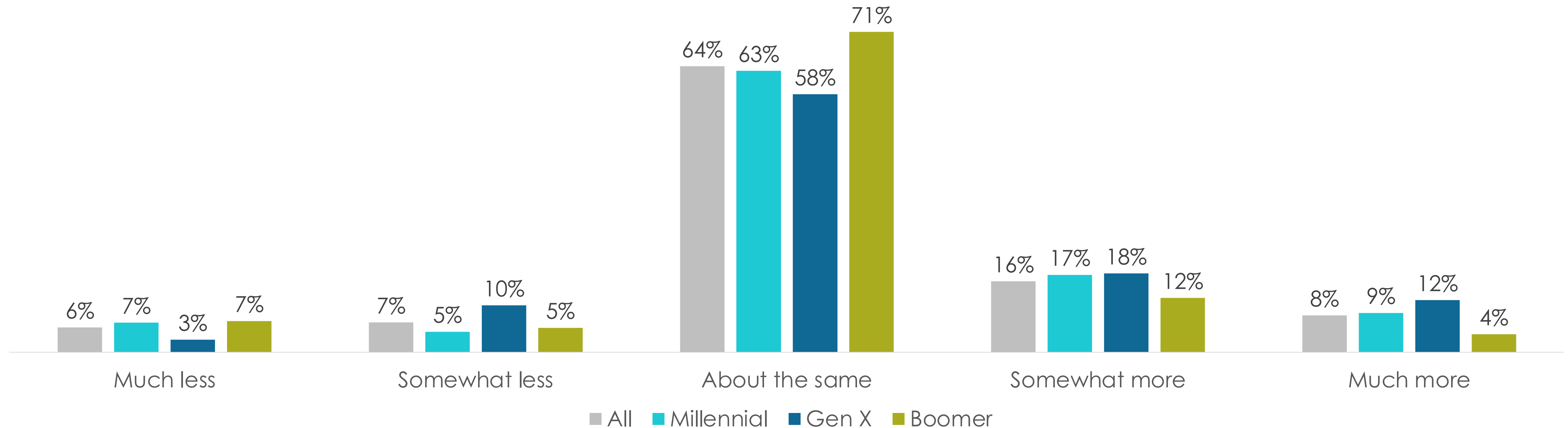
Amount of shopping that will be done in Walmart stores once COVID-19 is under control vs. before COVID-19



How much more or less shopping will you do **in Walmart stores** once COVID-19 is brought under control than you did before COVID-19?

Walmart.com will also benefit from a new-found allegiance as 24% expect to do more online shopping with the retailer post-COVID while 13% anticipate doing less.

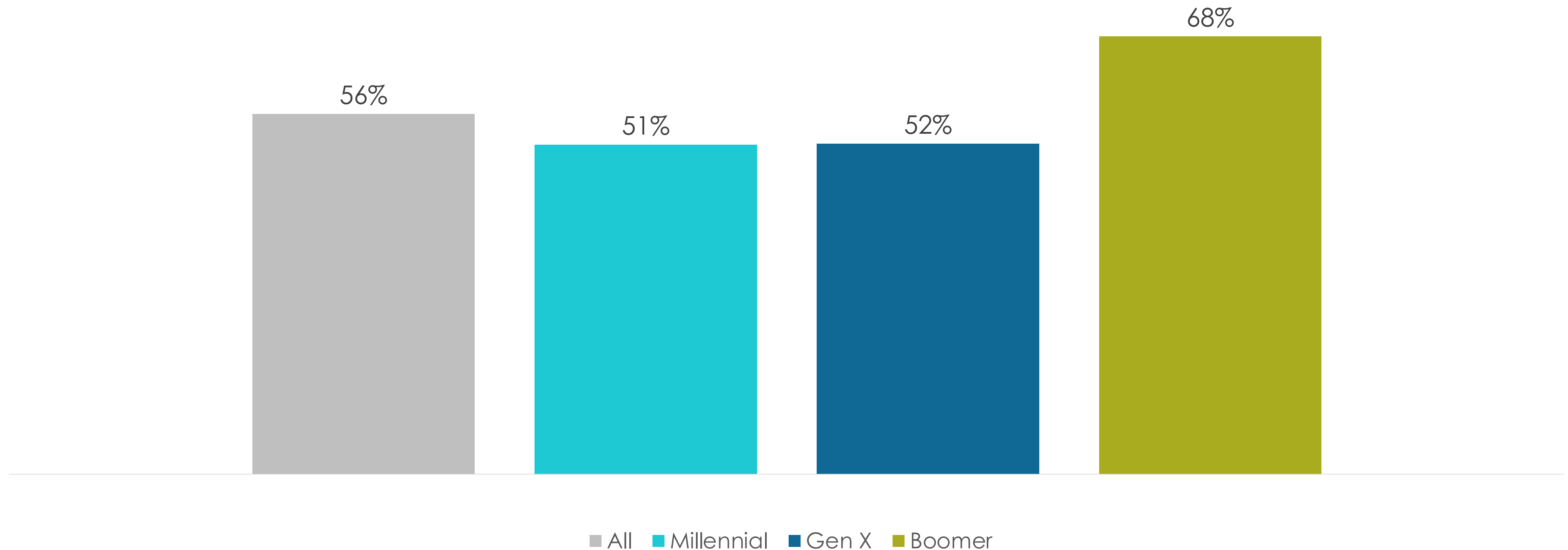
Amount of shopping that will be done on Walmart.com once COVID-19 is under control vs. before COVID-19



How much more or less shopping will you do at **Walmart.com** once COVID-19 is brought under control than you did before COVID-19?

The value of merging the online and brick & mortar experiences is demonstrated by the fact that respondents' purport that 56% of their purchases made at Walmart.com are for store pickup rather than delivery. However, this may change as Walmart+ becomes more widely available.

% Of those who say their method of receiving items when shopping Walmart.com is store pick up

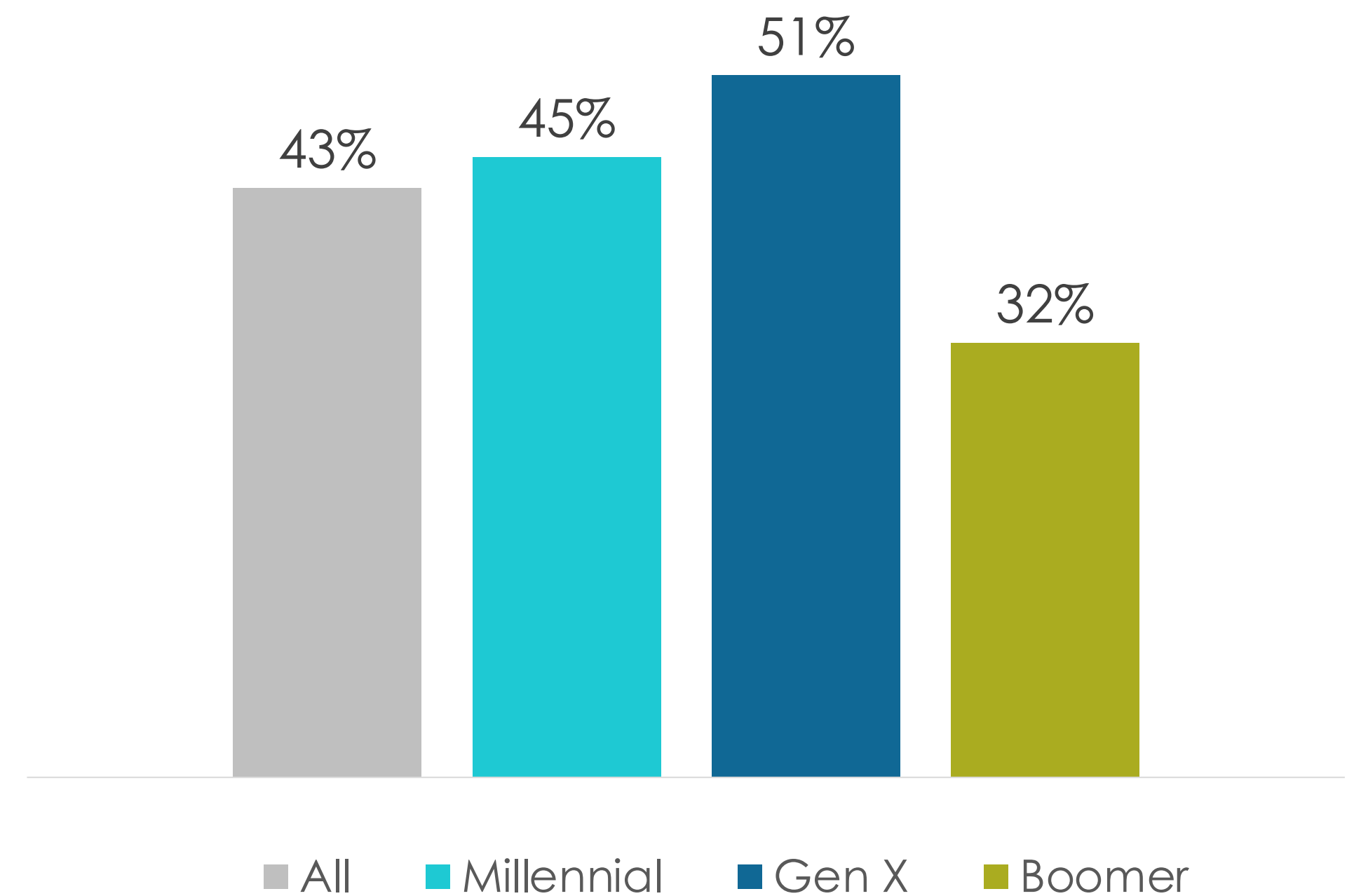


What % of the shopping you do at Walmart.com is for home delivery and how much is for pick up at the store? Total must equal 100%.



Ample opportunity exists to improve awareness of Walmart+ as only 43% of those shopping one or both of Walmart's platforms are aware of the program.

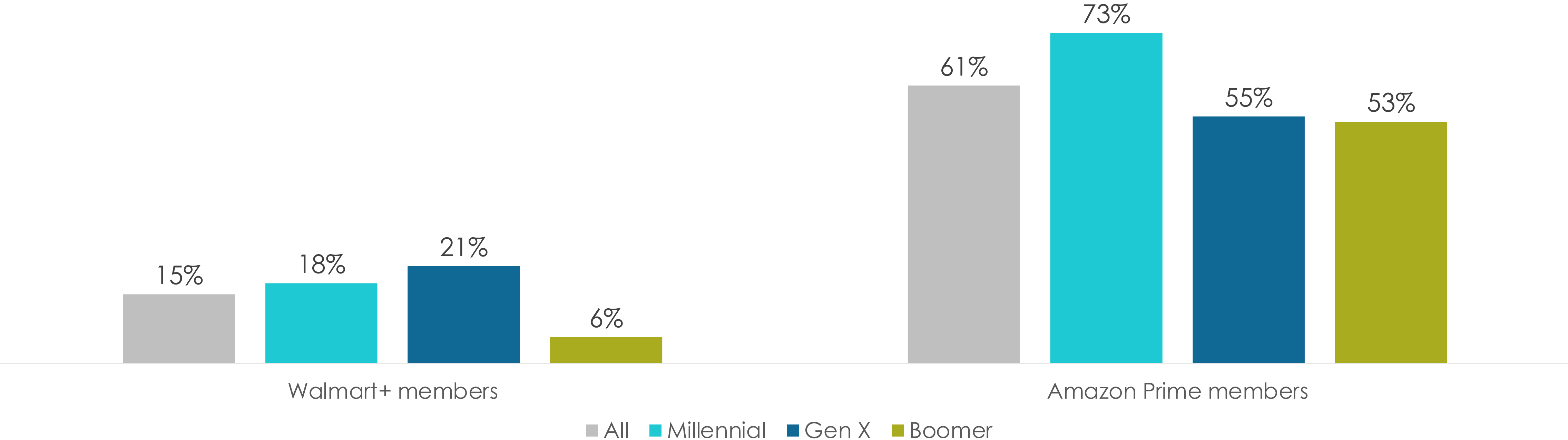
% Who are aware of Walmart+



Are you aware of the Walmart+ program?

In addition, only 15% of Walmart shoppers are participating in Walmart+ as opposed to the 61% who are Amazon Prime members.

Walmart+ and Amazon Prime members

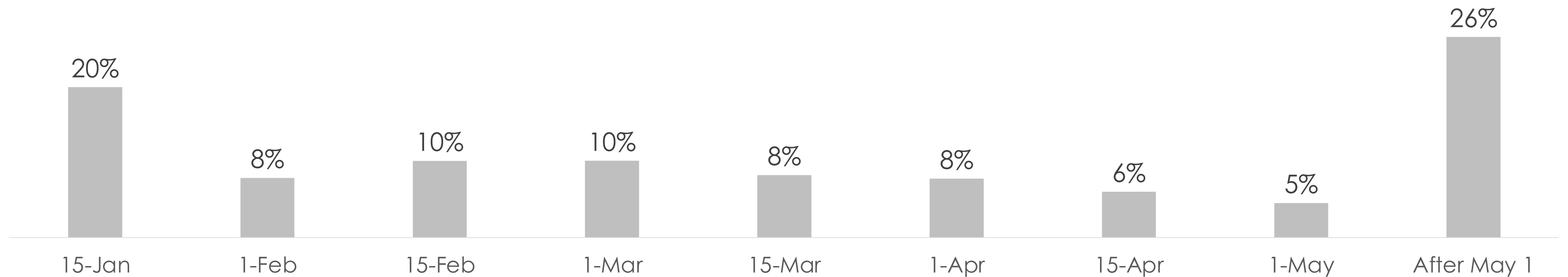


COVID-19 Hot Topics



People remain somewhat more confident about the timing of their access to the vaccine than they should be. It's highly unlikely that nearly half (48%) of the adult population will have a vaccine available to them by March 1st.

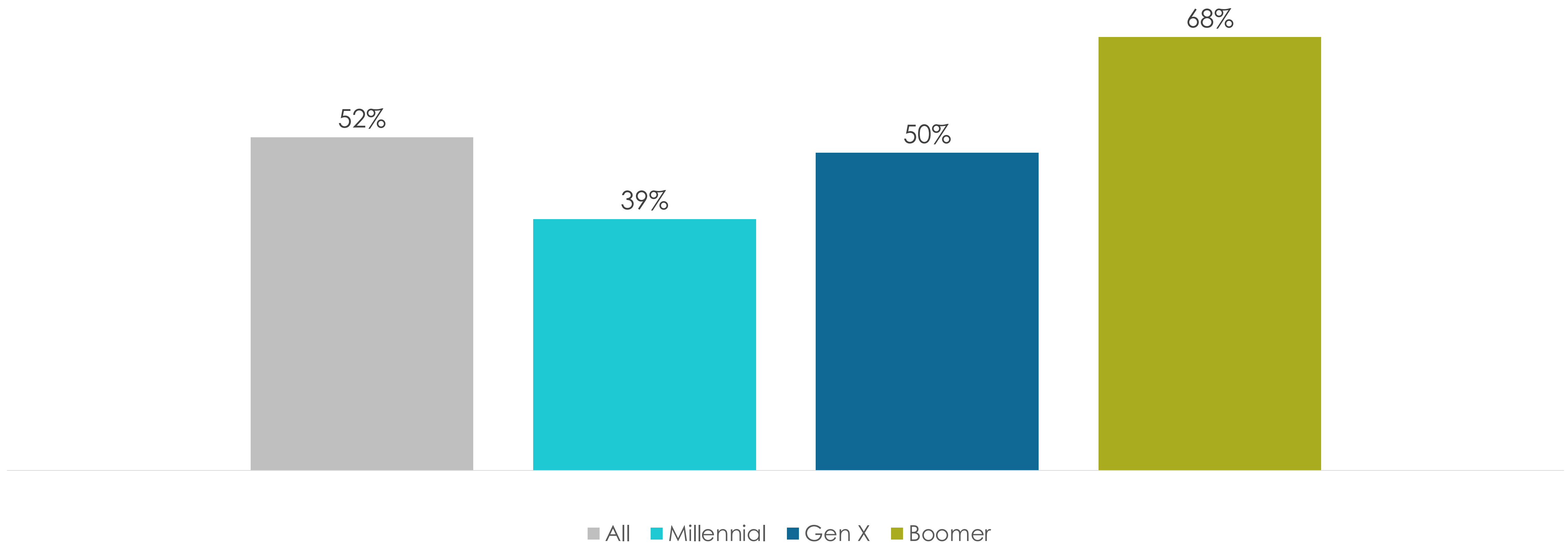
Expected date for vaccine to be available

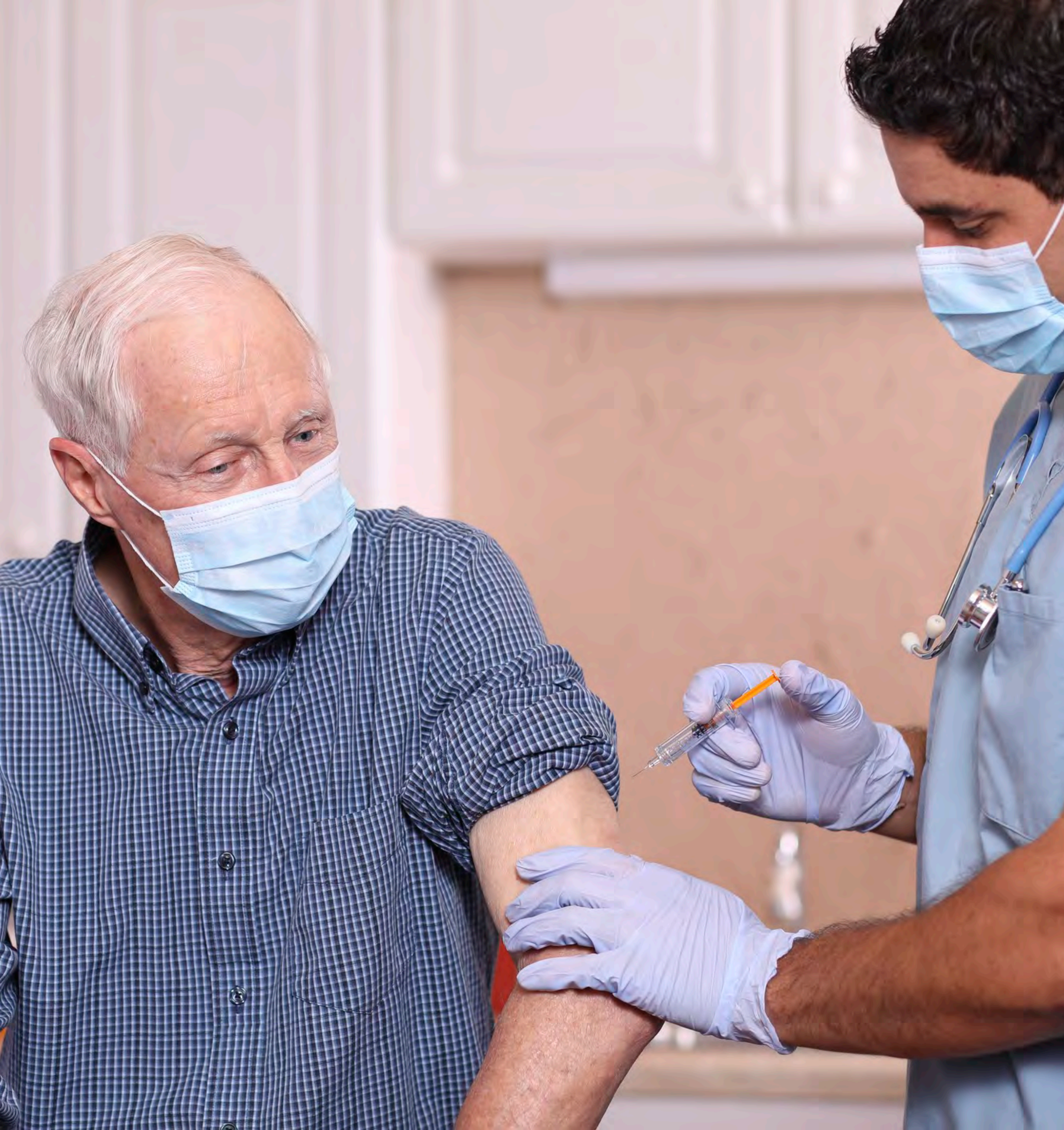


How soon do you think a vaccine could be available for you if you choose to get vaccinated?

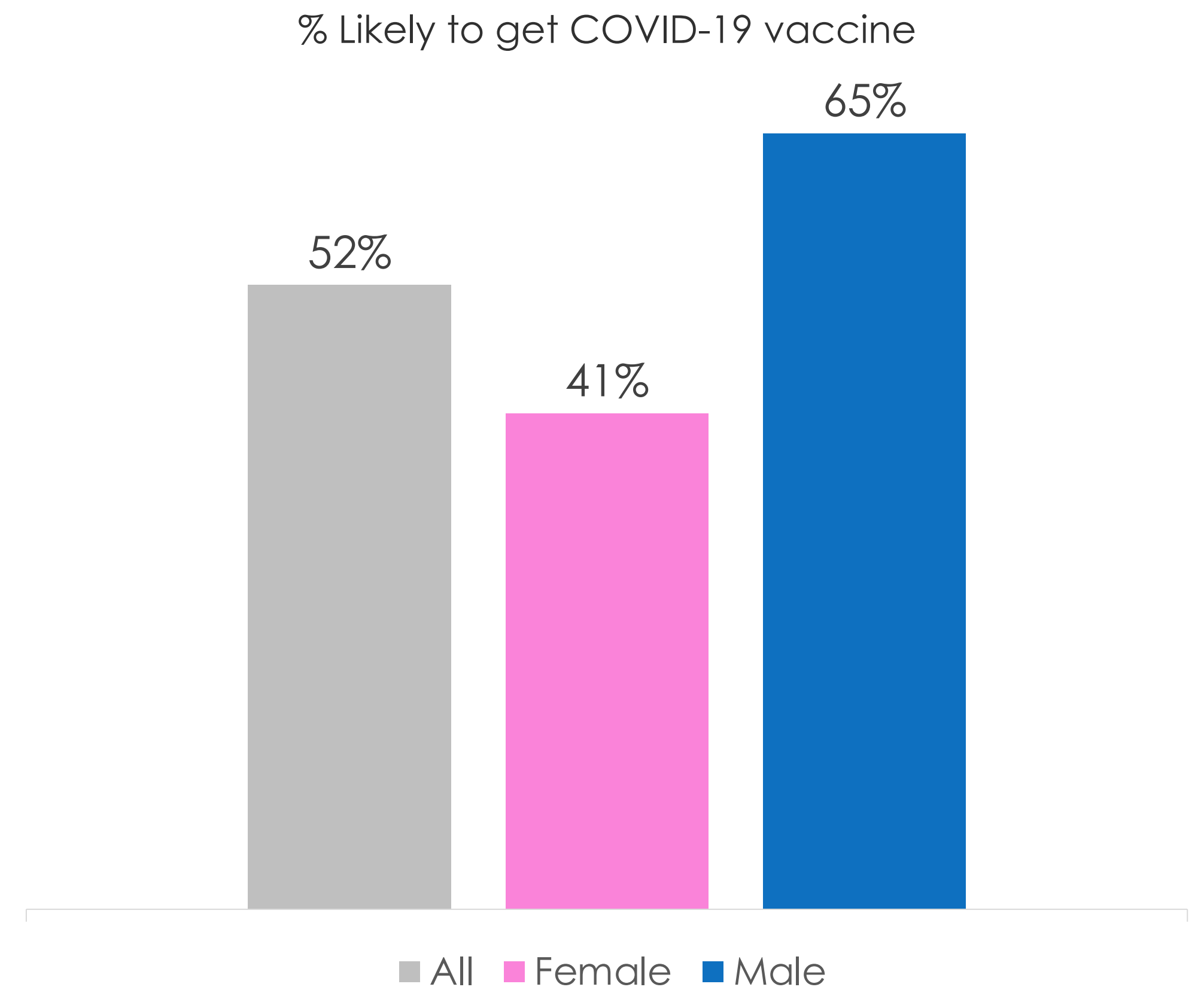
People are still skeptical about the safety and/or efficacy of the vaccine, resulting in only 52% who are likely or very likely to get the vaccine when it becomes available to them.

% Likely to get COVID-19 vaccine





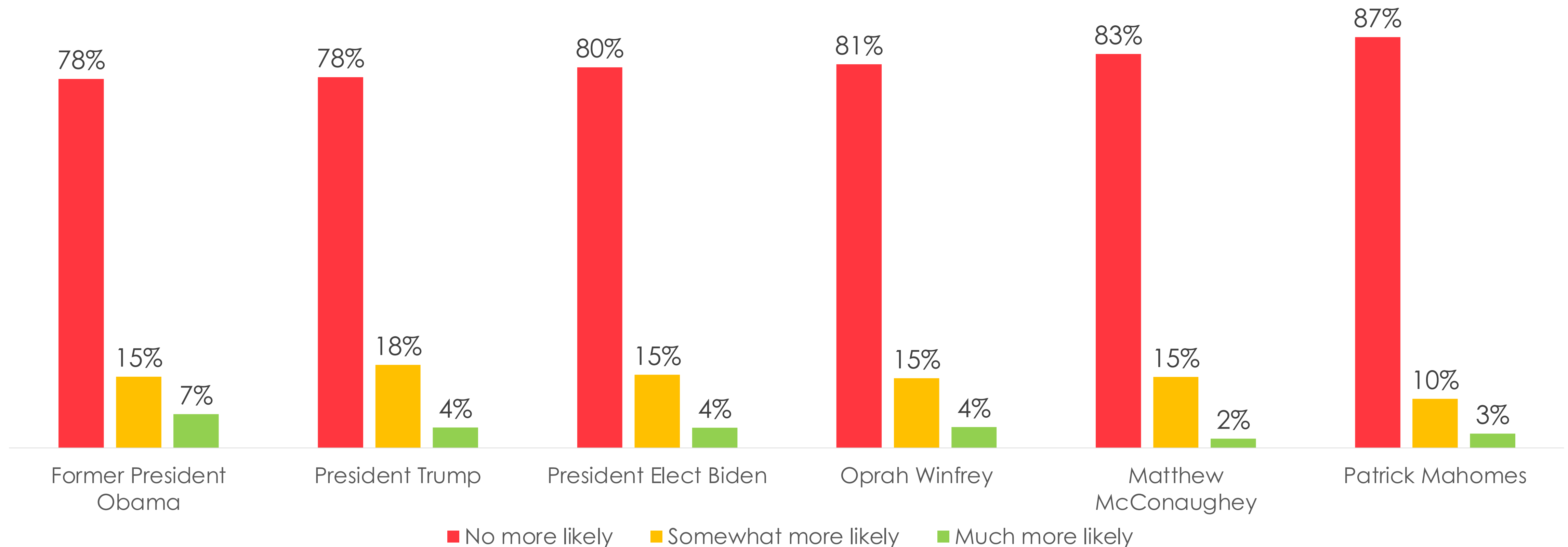
Men (61%) continue to be much more likely than women (41%) to get the vaccine when it is available to them.



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

The likely influence of public figures on respondents' perceptions of the vaccine is negligible. Of 14 politicians, athletes and entertainers whose potential influence was tested, Barack Obama at only 7% was the one most likely to make people much more likely to get the vaccine.

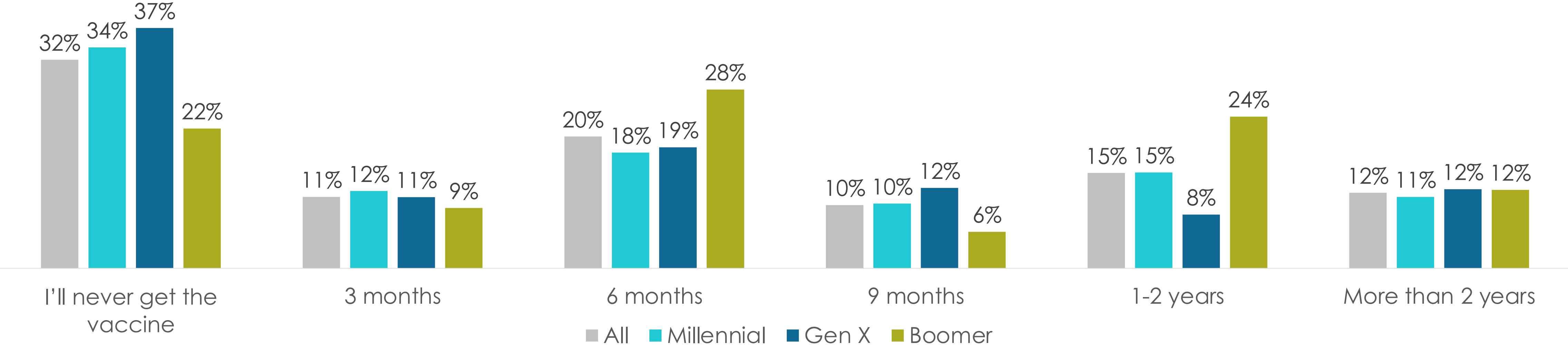
Likelihood to get the COVID-19 vaccine if a public figure got it



How much more likely would you be to get the vaccine if you saw video of the following people getting the vaccine?

There is good news in that 31% of those less than likely to get the vaccine when it is first available to them will be satisfied if the vaccine is safely deployed for 6 months. That suggests that 68% of adults would be willing to get the vaccine by May 15th.

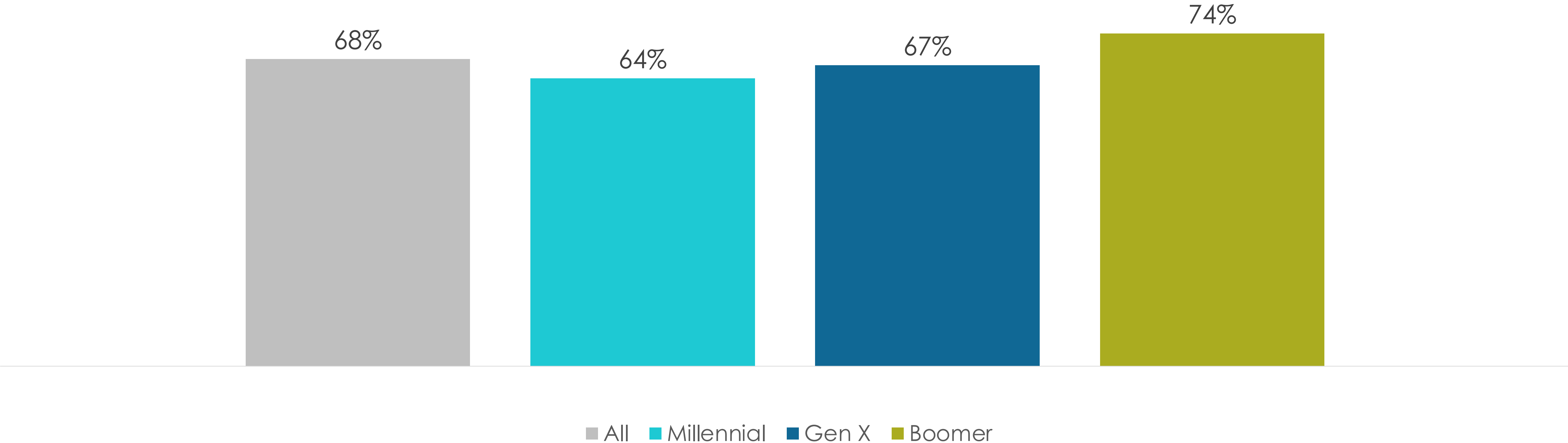
Length of time the COVID-19 vaccine needs to be available and proven safe for someone to be likely to get it



How long would the vaccine have to be widely distributed and proven safe and effective before you would be likely to get it?

Despite the fact that only 52% of respondents are likely to get the vaccine, 68% feel it should be mandatory for health care providers.

% Who think healthcare providers should be required to get the COVID-19 vaccine



Summary

Walmart

- Of the 88% of respondents who report having shopped in a Walmart store or at Walmart.com in the past 6 months, groceries (82%) are far and away the most popular category.
 - Interestingly, engagement in every other category measured is led by Millennials.
- Walmart's future also looks good as future purchase consideration in all categories except groceries is higher than the past six months purchases.
- The strength of future consideration among the younger generations is another positive as GenXers and Millennials will be the dominant force driving consumer spending in the near future.
 - 30% of respondents, including 40% of Millennials, will consider making purchases from Walmart in categories they would not have considered pre-COVID.
- 27% of respondents anticipate doing more shopping in Walmart stores post-COVID than they did pre-COVID, while only 14% are likely to do less.
- Walmart.com will also benefit from a new-found allegiance as 24% expect to do more online shopping with the retailer post-COVID while 13% anticipate doing less.

Summary - Continued

- The value of merging the online and brick & mortar experiences is demonstrated by the fact that respondents' purport that 56% of their purchases made at Walmart.com are for store pickup rather than delivery. However, this may change as Walmart+ becomes more widely available.
- Ample opportunity exists to improve awareness of Walmart+ as only 43% of those shopping one or both of Walmart's platforms are aware of the Walmart+ program.
- And, only 15% of Walmart shoppers are participating in Walmart+ as opposed to the 61% who are Amazon Prime members.

COVID-19 Hot Topics

- People remain somewhat more confident about the timing of their access to the vaccine than they should be. It's highly unlikely that nearly half (48%) of the adult population will have a vaccine available to them by March 1st.
- People are still skeptical about the safety and/or efficacy of the vaccine resulting in only 52% of respondents who are likely or very likely to get the vaccine when it becomes available to them.
- Men (61%) continue to be much more likely than women (41%) to get the vaccine when it is first available to them.

Summary - Continued

- Unfortunately, the likely influence of public figures on respondents' perceptions of the vaccine is negligible.
 - Of 14 politicians, athletes and entertainers whose potential influence was tested, Barack Obama at only 7% was the one most likely to make people much more likely to get the vaccine.
- There is good news in that 31% of those less than likely to get the vaccine when it is first available to them will be satisfied if the vaccine is safely deployed for 6 months.
 - That suggests that 68% of adults would be willing to get the vaccine by May 15th.
- 68% feel it should be mandatory for health care providers to get vaccinated despite the fact that only 52% of respondents are likely to get the vaccine themselves.