



# COVID-19 U.S. CONSUMER IMPACT TRACKING STUDY – WEEK 43

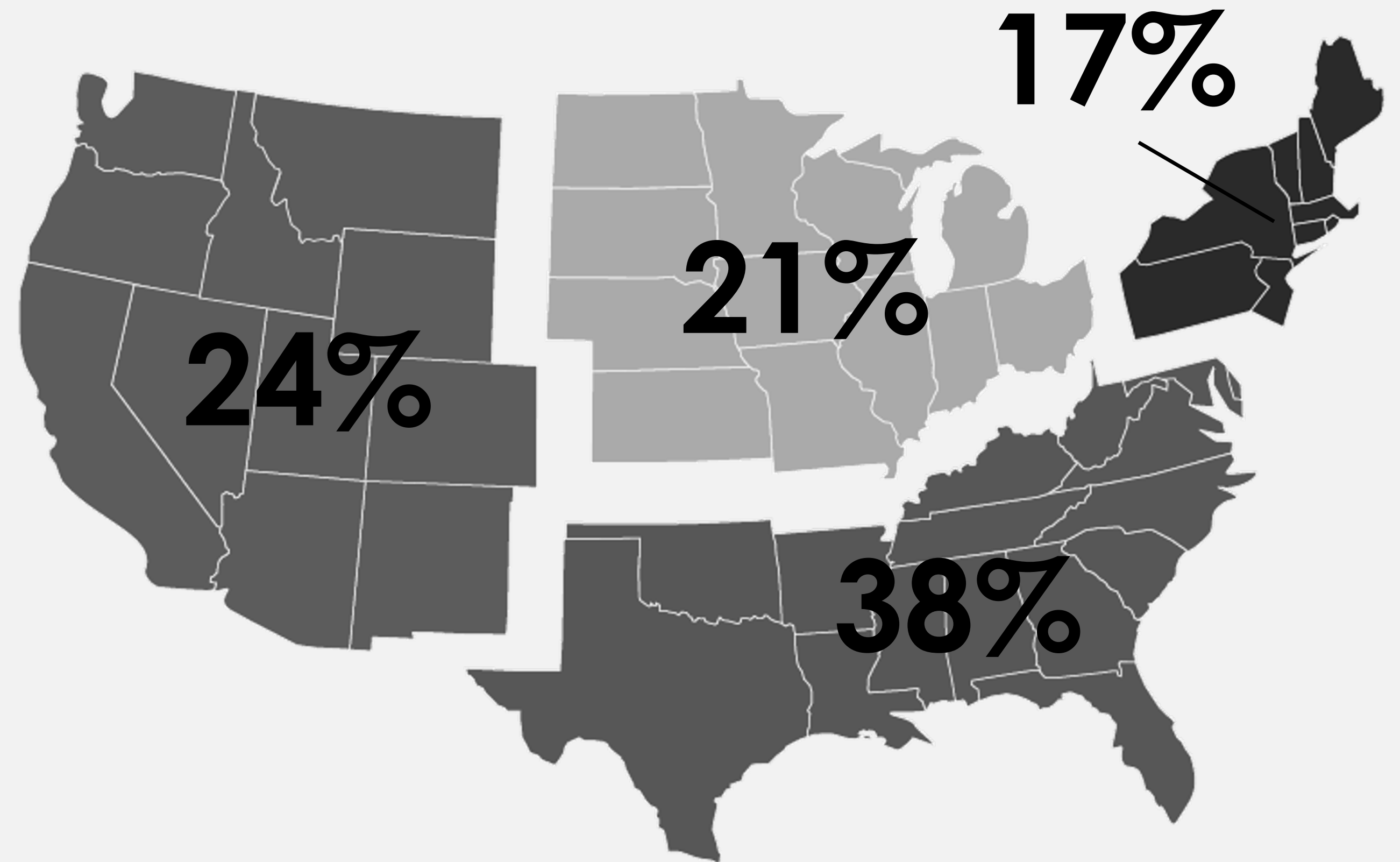
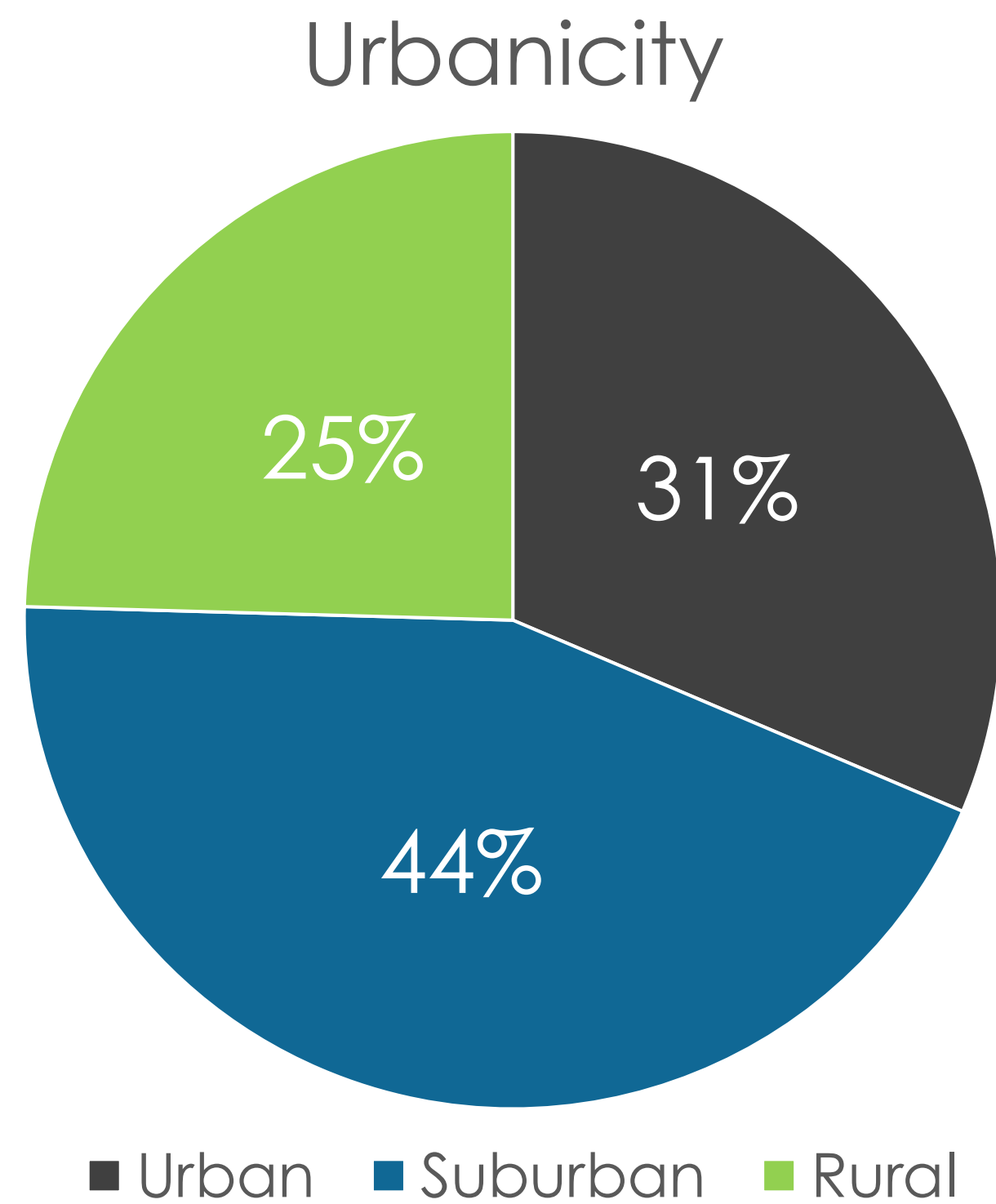
PRESENTED January 18, 2020

# Methodology

- N = 670
- MOE  $\pm$  3.79%
- Panel: General Population
- Collected: 1/14/21, 1/15/21

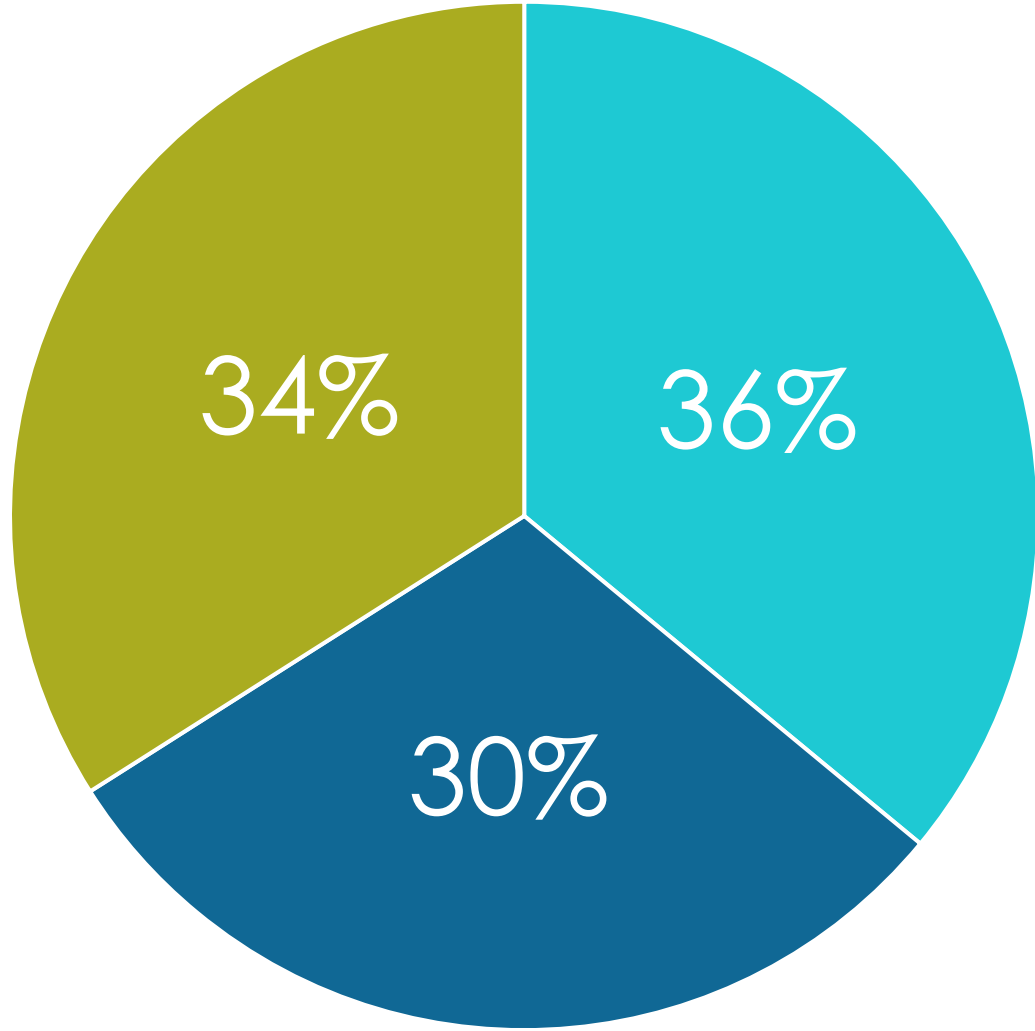


# Panel Composition



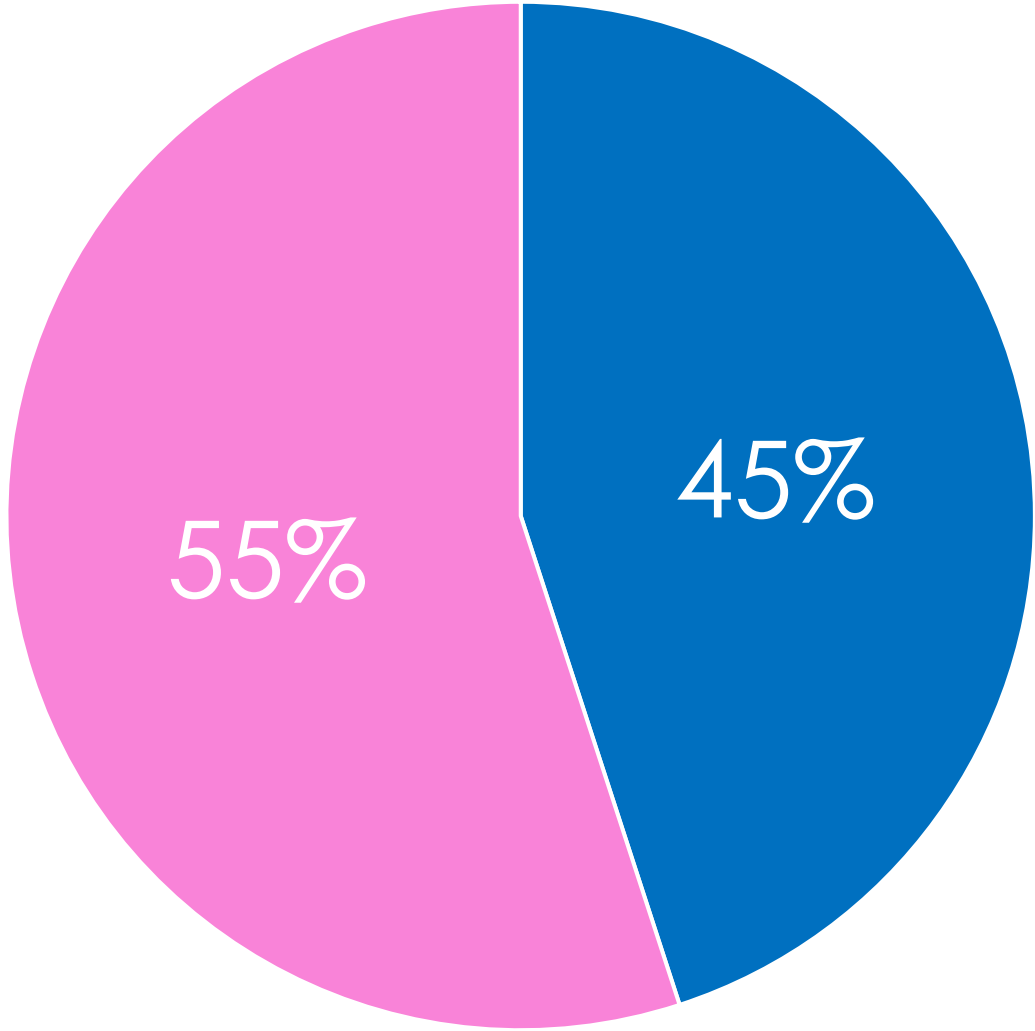


Generation



■ Millennial ■ Gen X ■ Boomer


Gender



■ Male ■ Female

# Consumer Concerns

STANLEY.  
**AUTOMATIC  
CAUTION  
DOOR**

STANLEY  
  
**ACTIVATE SWITCH  
TO OPERATE**

**No COVID-19  
testing at this  
location**

**Vaccine not  
yet available**

Learn more at [Walgreens.com/Coronavirus](https://www.walgreens.com/coronavirus)

*Walgreens*

**For safety  
and savings**

**This store is protected by:**

- Security cameras
- Emergency alarm systems
- High-security pharmacy safe with time delay



pharmacy

monday 8:00 am — 8:00 pm

tuesday 8:00 am — 8:00 pm

STORE HOURS

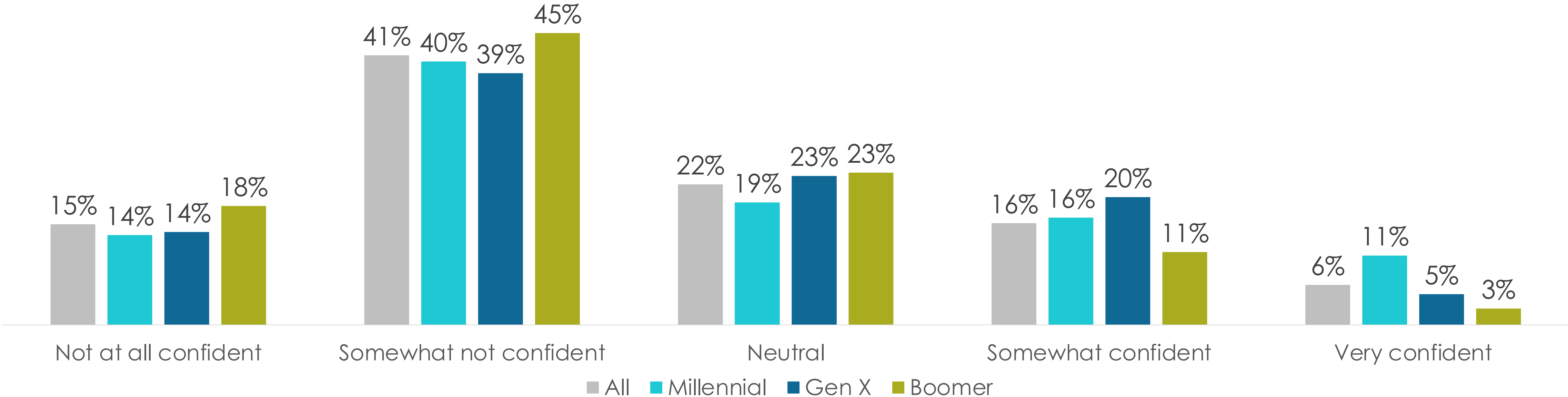
monday 8:00 am — 10:00 am

tuesday 8:00 am — 10:00 am

**THANK YOU FOR SHOPPING  
DUANEreade™**

Overall confidence in the U.S. economy is lagging. 56% of respondents lack confidence while only 22% are somewhat or very confident.

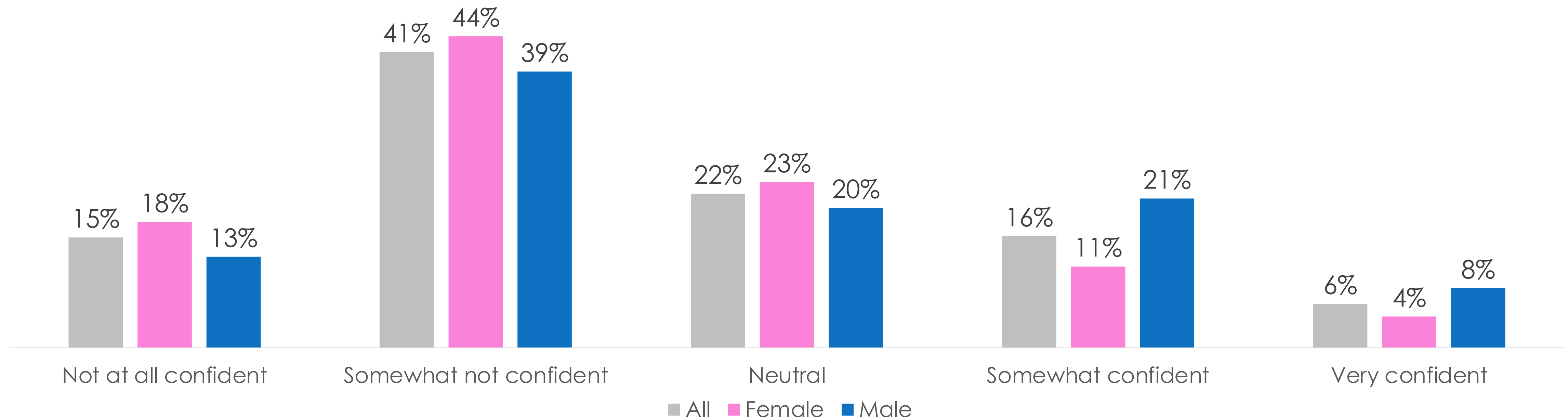
### Confidence in the U.S. Economy Right Now



How confident are you in the U.S. economy now?

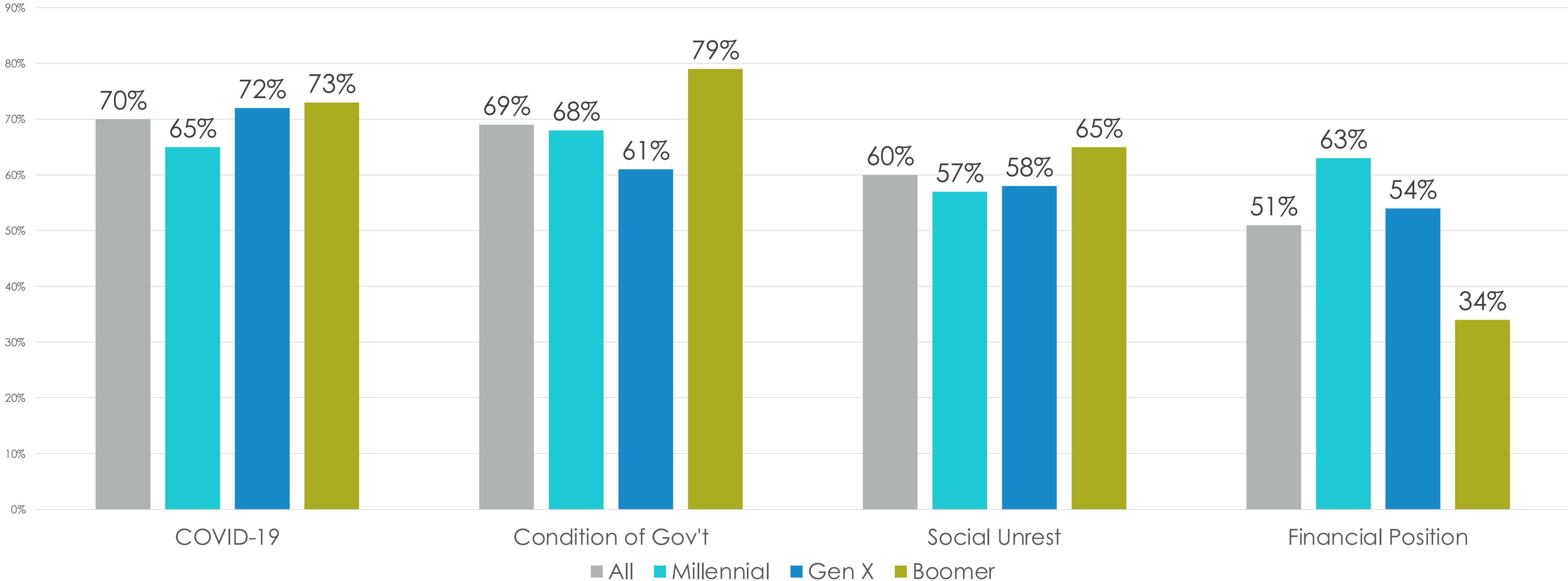
Confidence among men (29%) is nearly double that of women (15%).

### Confidence in the U.S. Economy Right Now



Among respondents with a heightened level of concern, the primary drivers of concern are COVID (70%), the condition of the government (69%) and social unrest (60%).

Top 2 box Sources of Concern

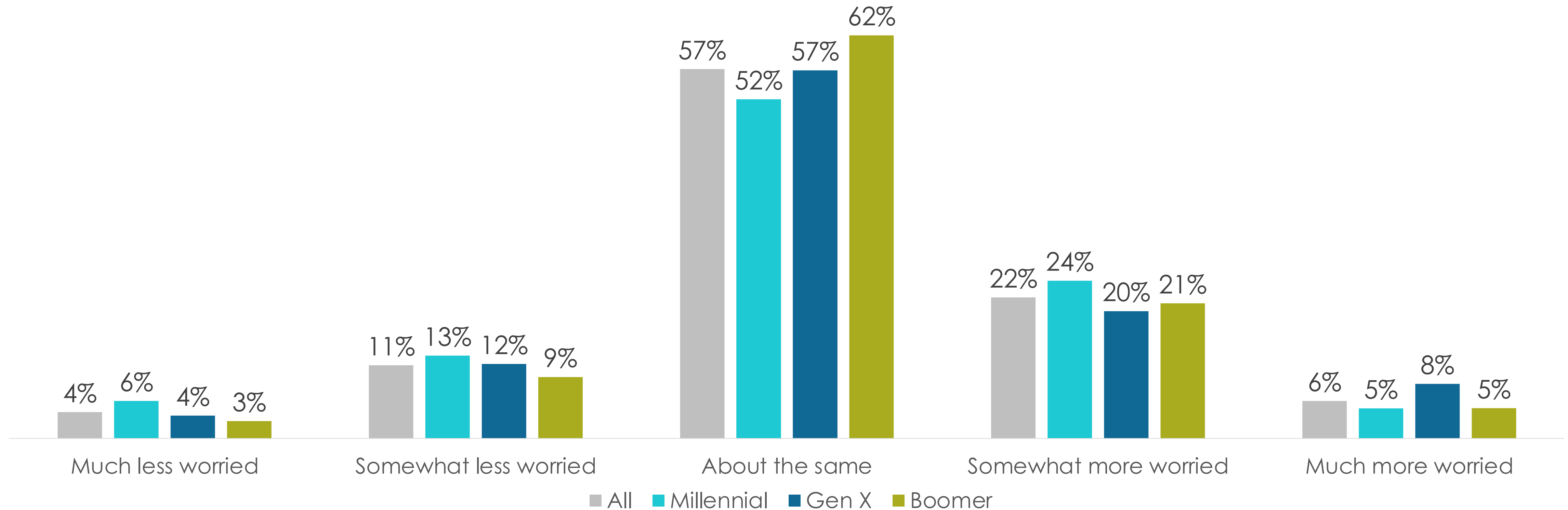


To what extent do the following contribute to your overall concern level?



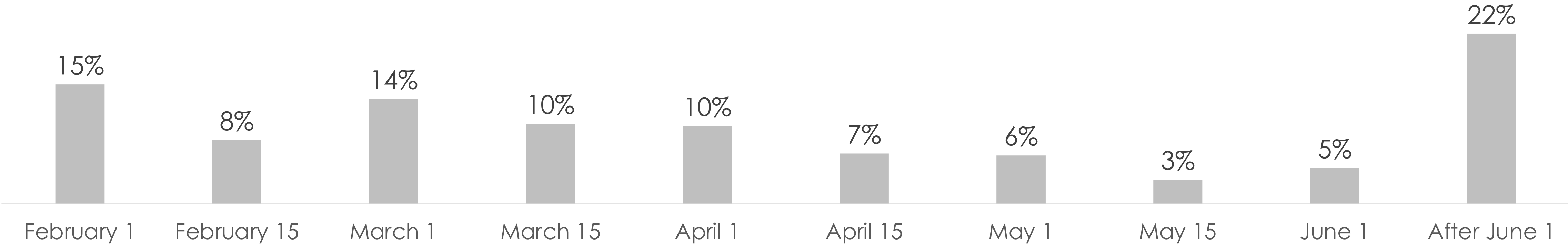
Despite the rollout of the vaccine, more people (28%) have a greater concern about COVID than those who have seen their concern diminish (15%) over the past month.

Worry Level About COVID Compared to a Month Ago



Some of the concern is likely attributable to the fact that 27% of respondents feel the vaccine won't be available to them until sometime after June 1<sup>st</sup>.

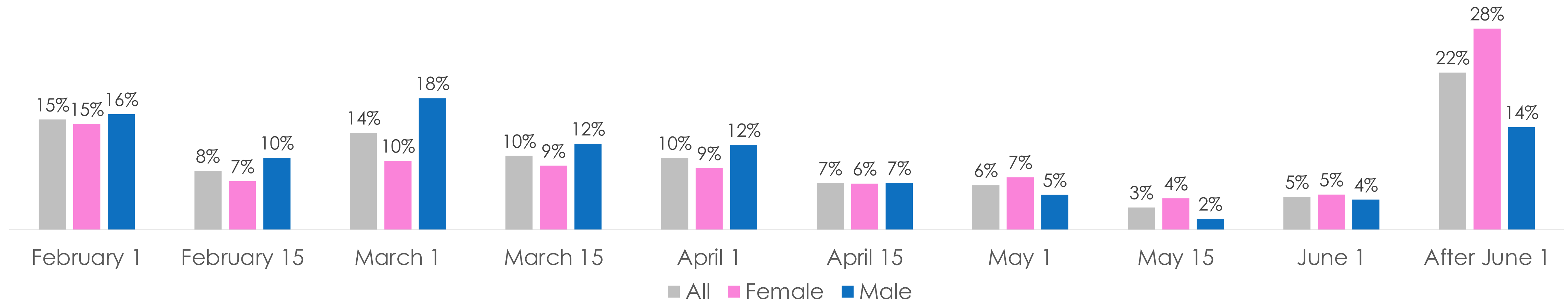
Expected Date for Vaccine to be Available



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

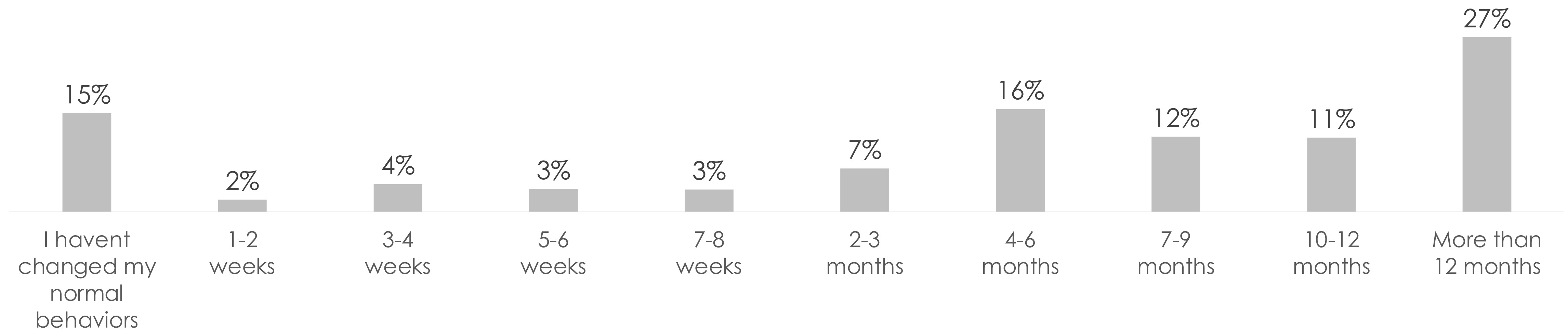
Men (68%) are much more likely to believe they'll have access to the vaccine by April 1<sup>st</sup> than women (50%).

### Expected Date for Vaccine to be Available



The delay in the vaccine's distribution and the severity of the current infection rates have 50% of respondents thinking it will be 6 months or more before their lives return to normal. More than one-quarter (27%) think it will be a year or more.

Timeframe of Returning to Normal Behavior



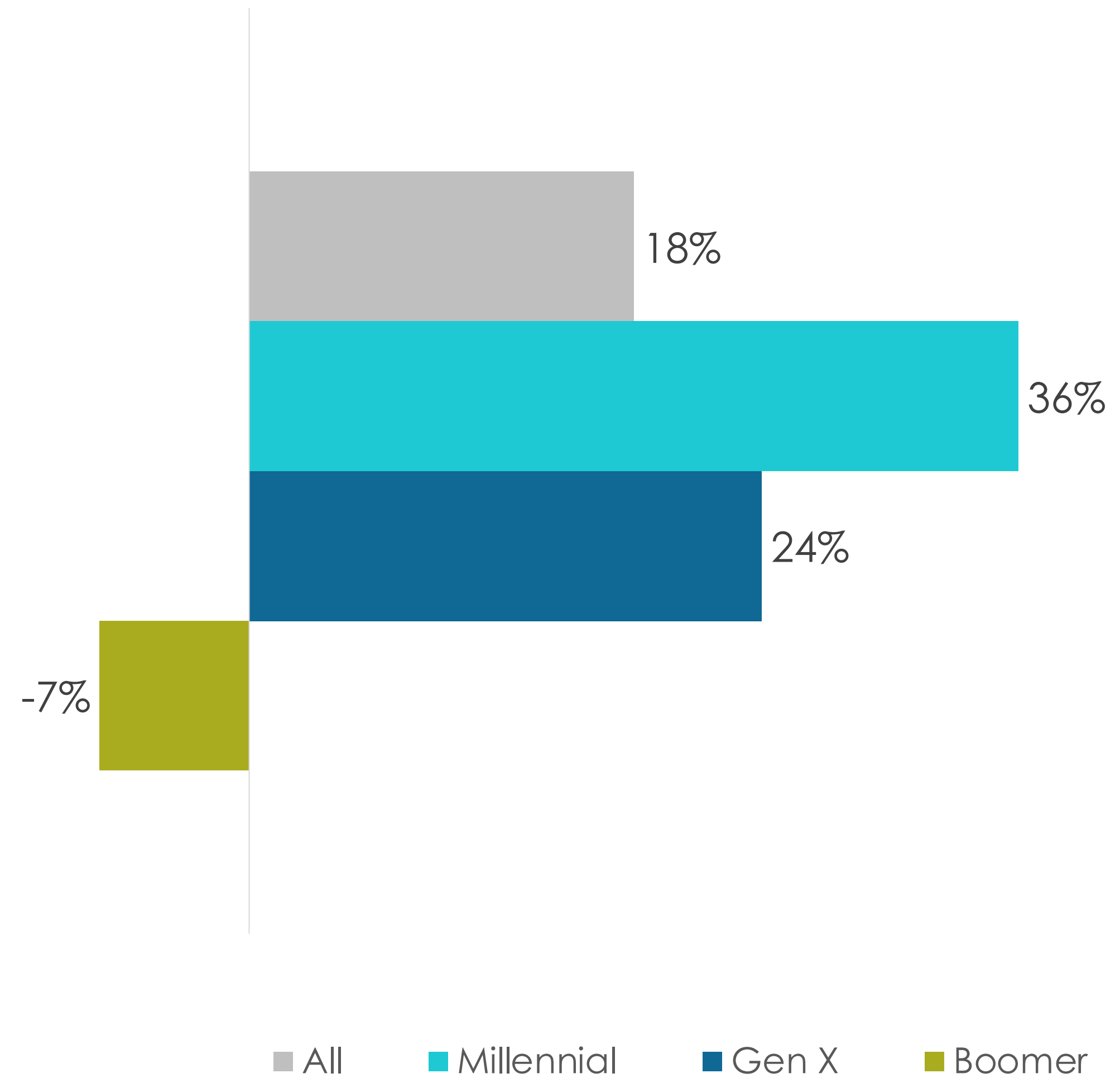
When do you think it is likely that you'll return to your normal behaviors (going to work, eating out, shopping, etc.)?



# Homes Are a Bright Spot

Despite a relatively high concern about personal finances, 18% more households anticipate having a higher income in 2021 than a lower income. Only Boomers, many of whom have likely recently retired or will retire in the coming year, are more prone to think their income will be down year-over-year.

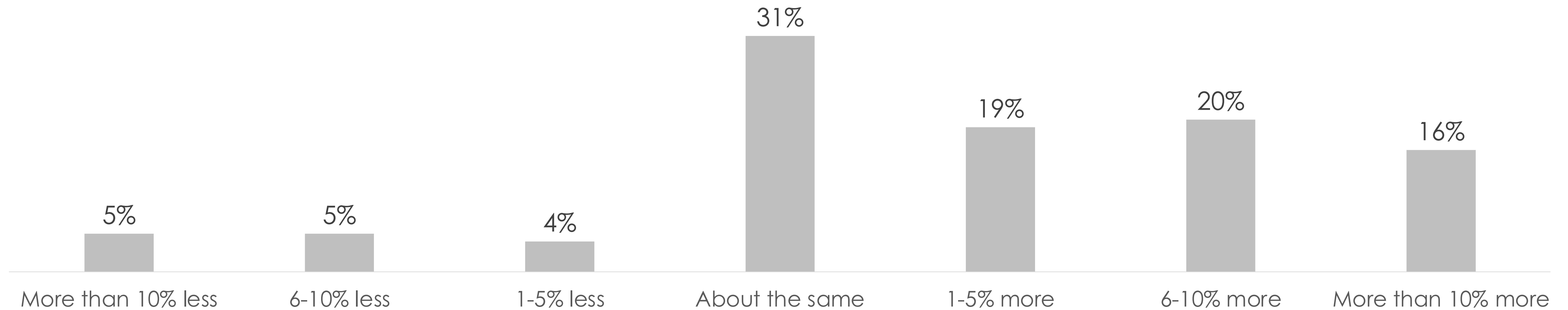
### Net (increase – decrease) Change in Household Income



How much higher or lower do you expect your household income to be in 2021 as compared to 2020?

More than half (55%) of all homeowners feel the value of their homes appreciated in 2020 while only 14% feel their home's value declined.

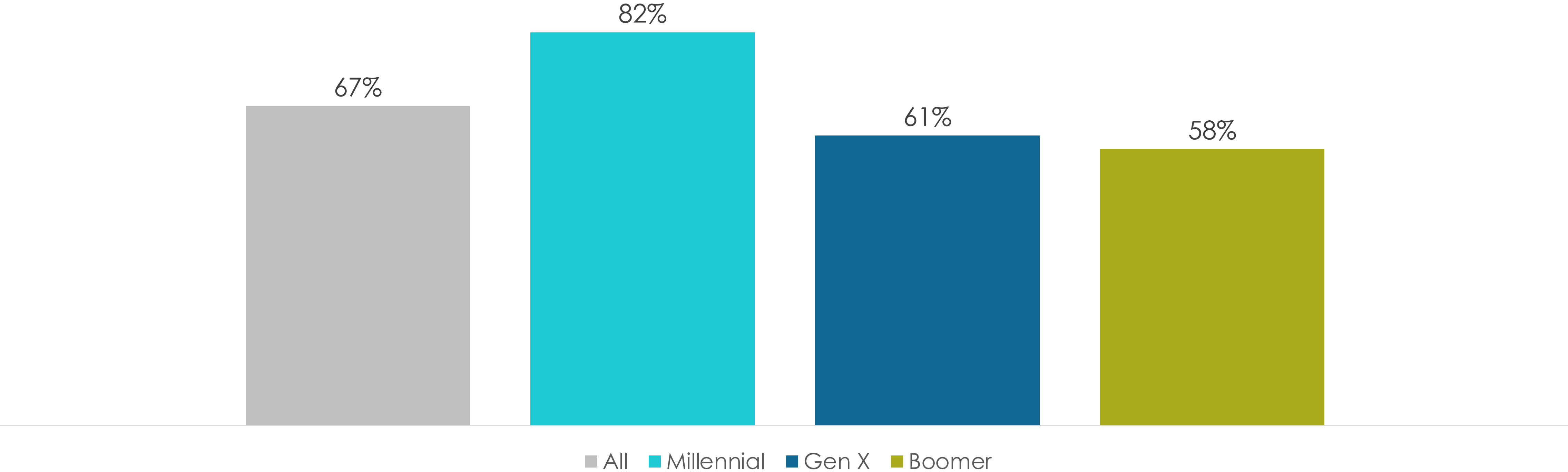
### Home Value This Year Compared to a Year Ago



If you were to sell your home today, how much more or less do you think it would sell for than it would have a year ago?

Two-thirds of respondents plan to make additional investments in their home in the coming year.

Likely to Make Investments in the Home in the Coming Year

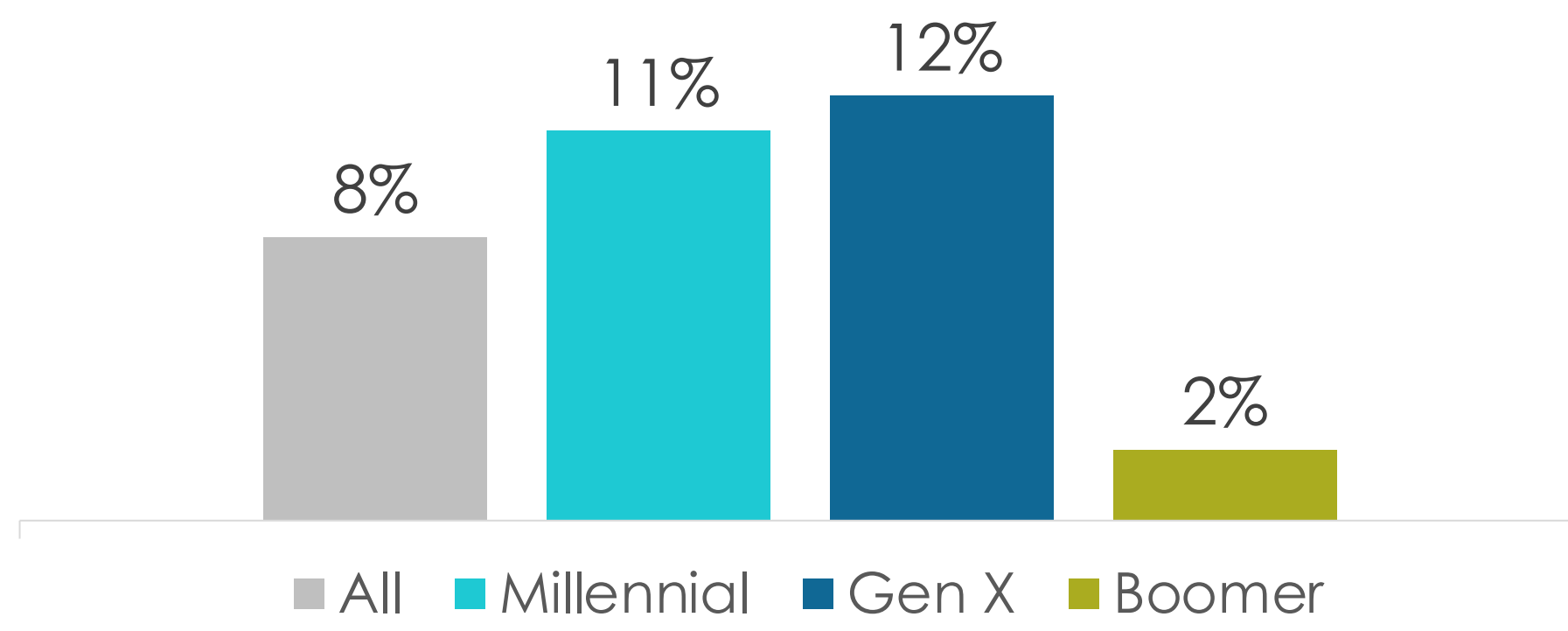






In addition to the 8% of current homeowners who plan to buy a new home this year, another 11% of homeowners are considering doing so.

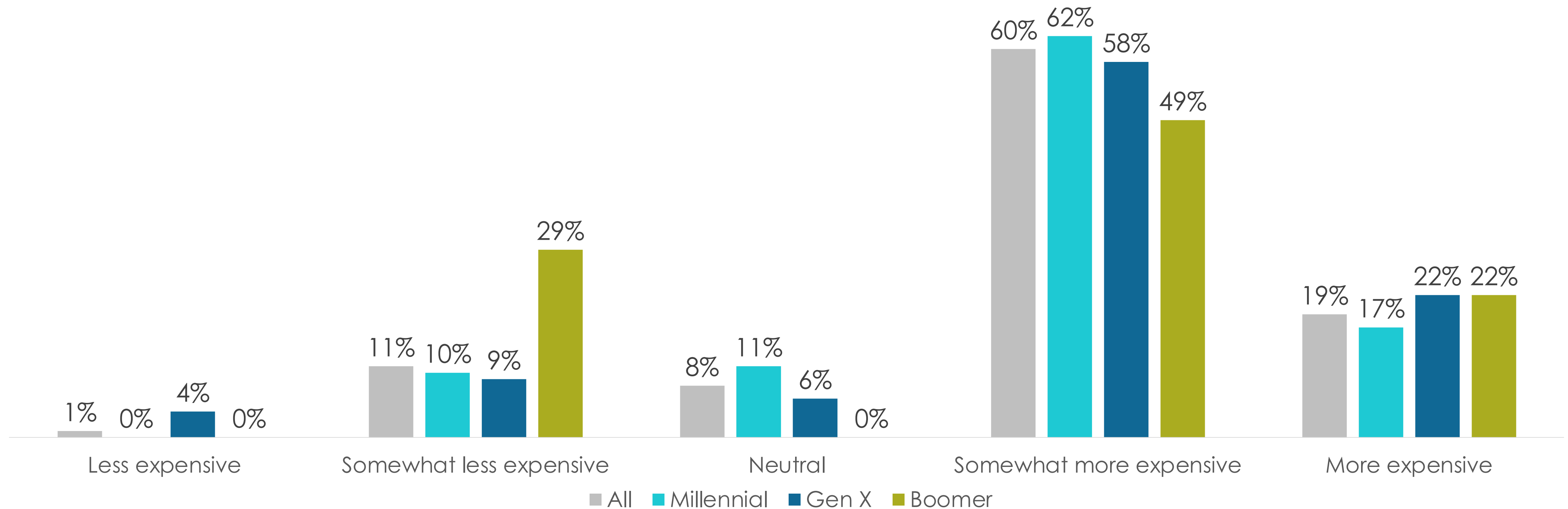
Likely to Buy a New Home in the Next Year



In the next year, how likely are you to buy a new home?

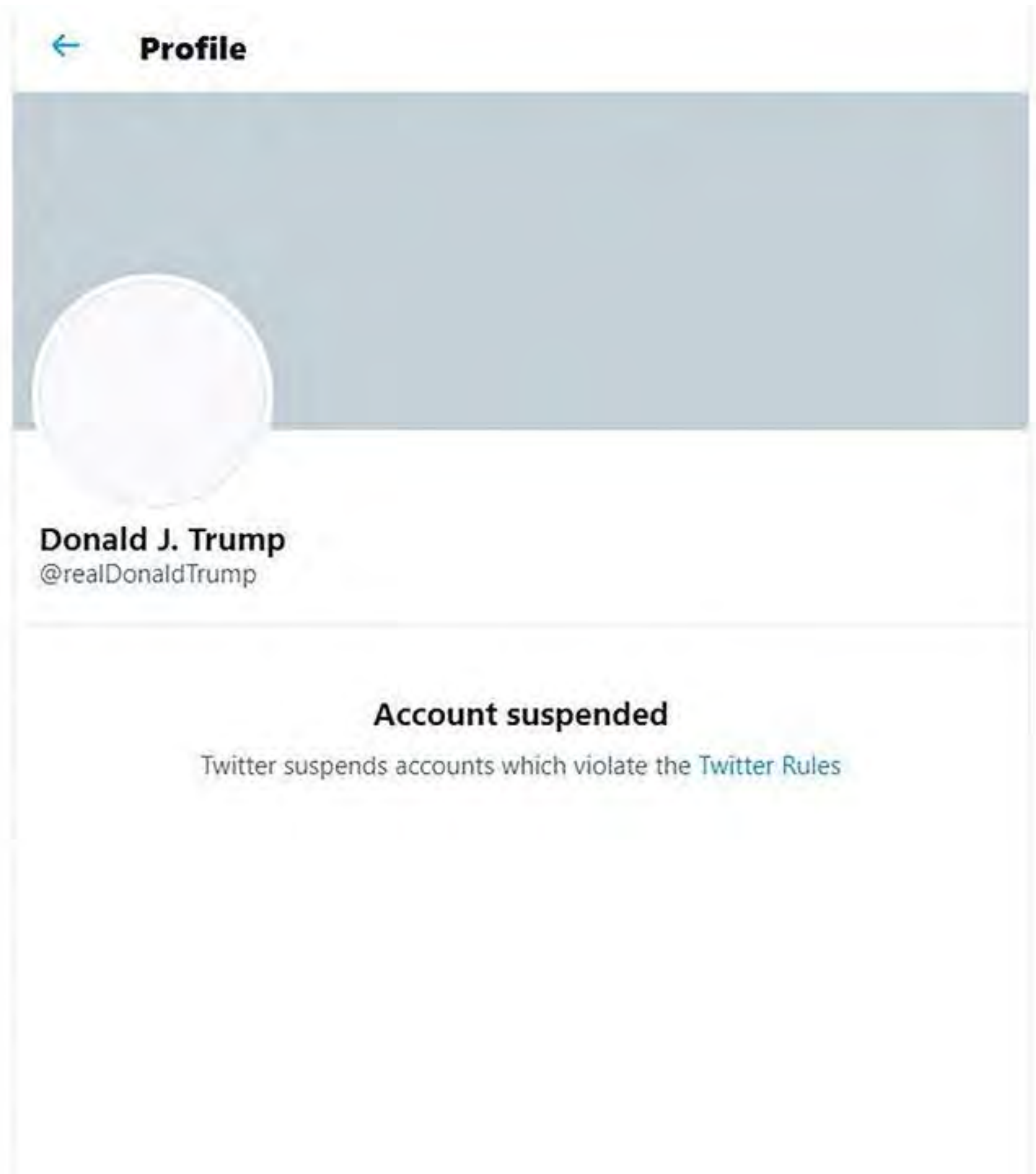
Of those planning a new home purchase, 79% anticipate increasing their investment level. Boomers (29%) are most likely to downsize.

Cost of Home Planned to Purchase vs. Current Home



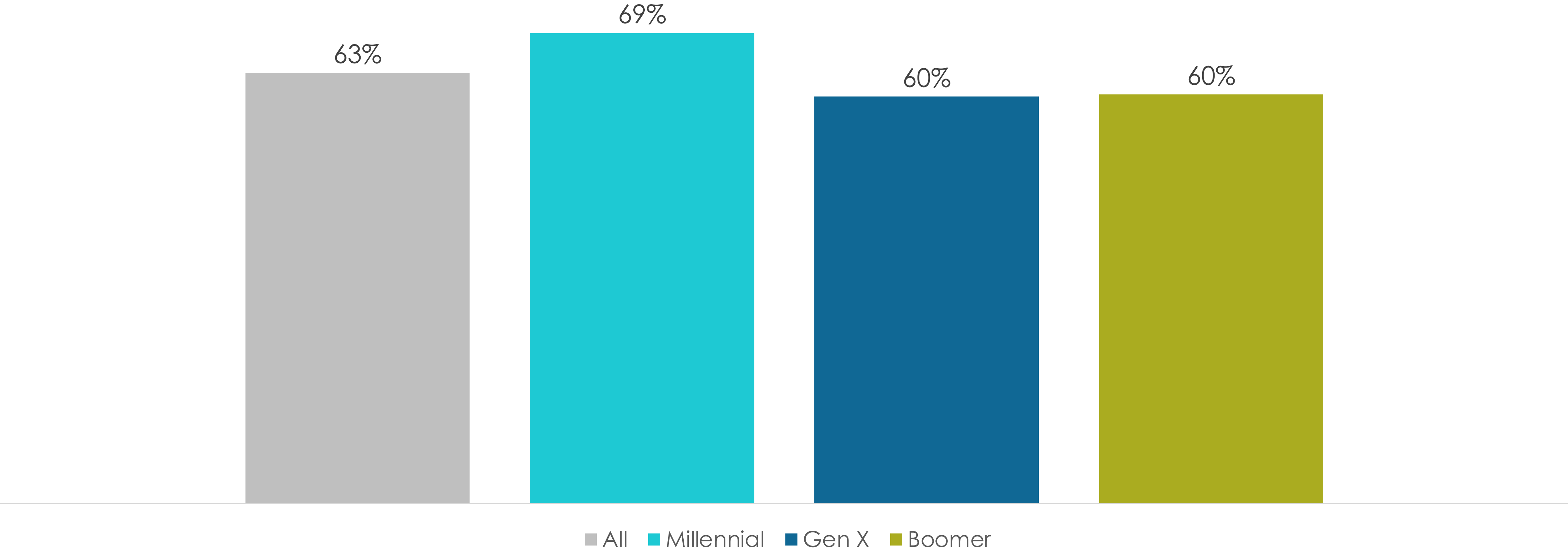
Thinking about the home you plan to purchase, how much more or less expensive will it be than your current home?

In recent days, major social media sites have taken a stance against President Trump. While this is a major social statement on their part, it carries with it some potentially significant commercial risk.



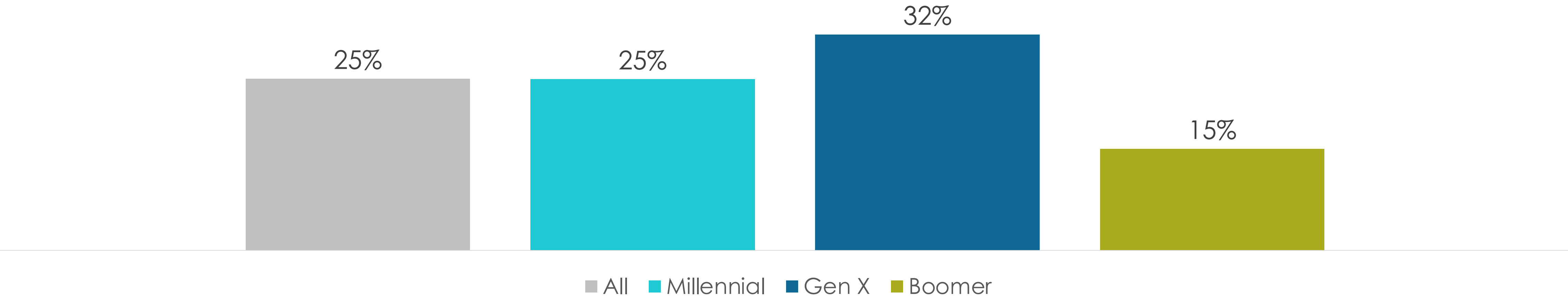
Approximately two-thirds (63%) of respondents feel that Twitter's decision to permanently suspend President Trump's account was appropriate.

% Who Think Twitter Suspending Trump's Account Was Right Thing To Do



However, 1 in 4 respondents plan to delete their Twitter account as a result of the ban on Mr. Trump.

% Who Will Delete Their Twitter Account Because of Trump's Suspension

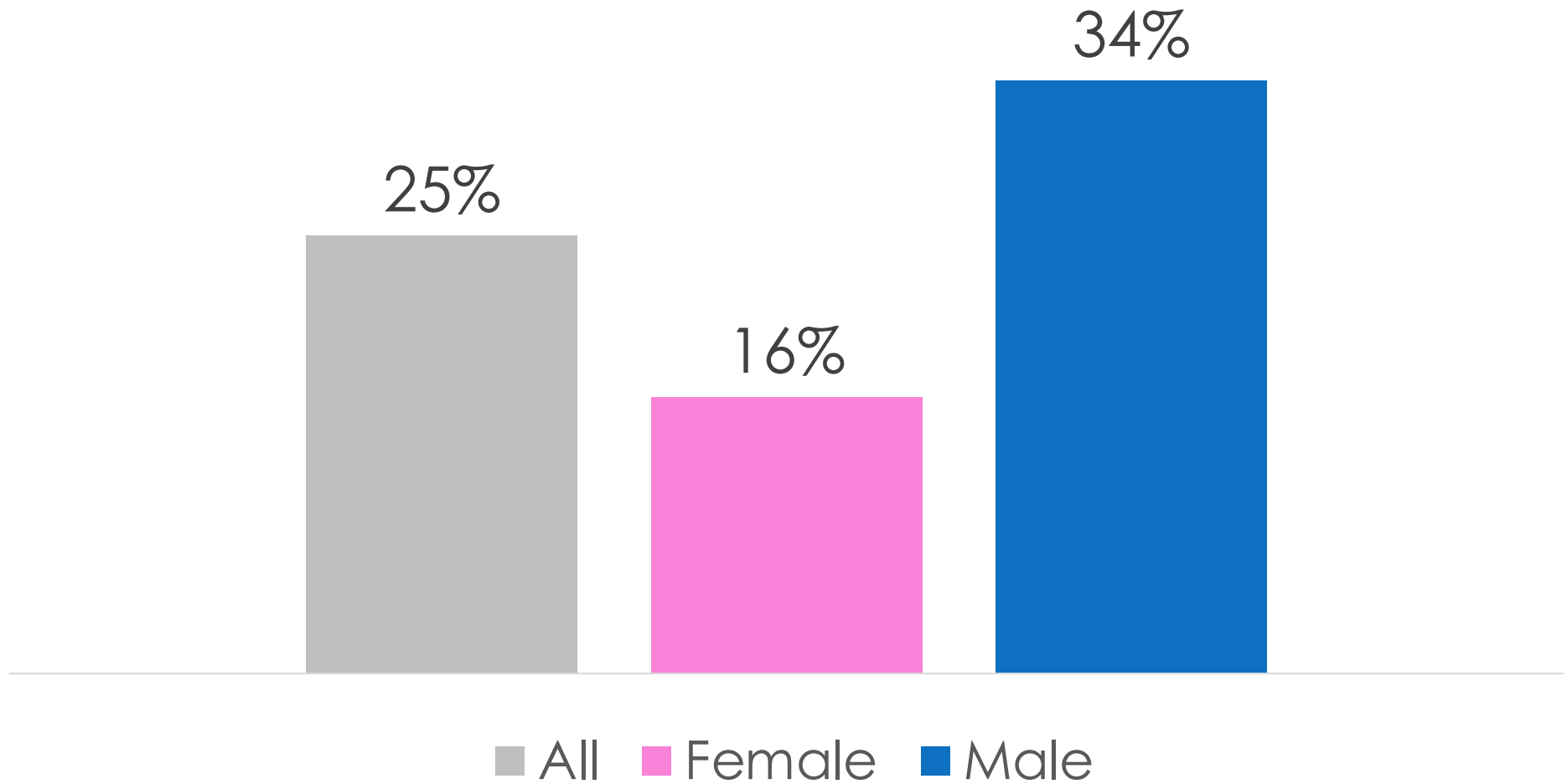


As a result of Twitter's decision to suspend President Trump's account will you delete your Twitter account?



Men (34%) are more than twice as likely as women (16%) to abandon their Twitter account.

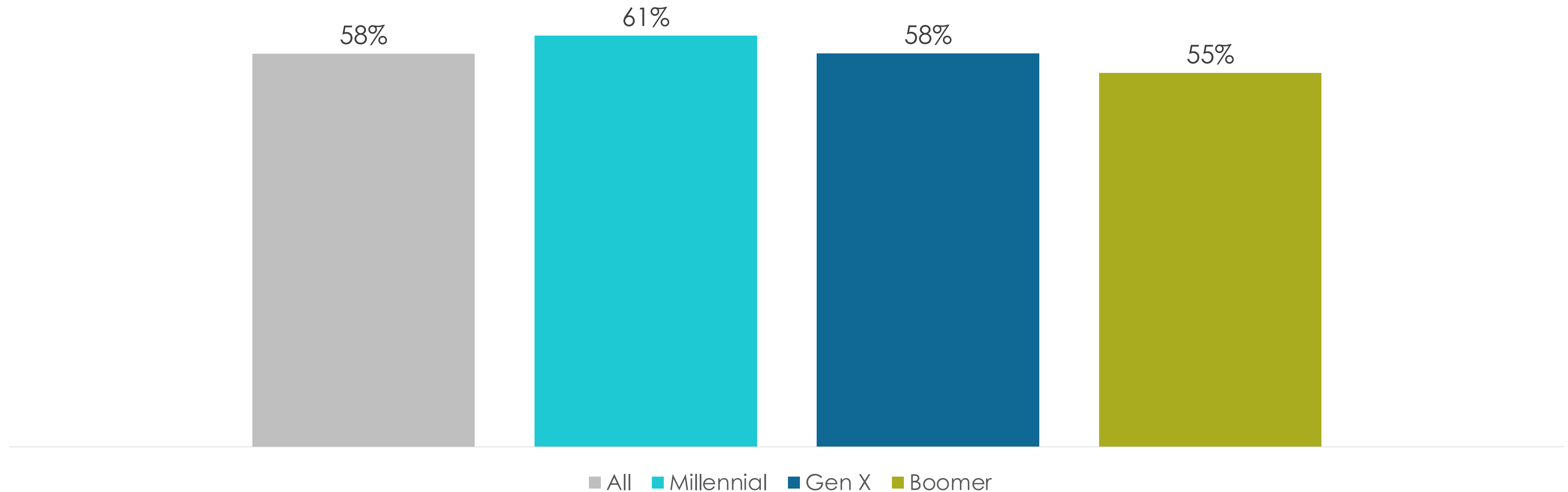
% Who Will Delete Their Twitter Account Because of Trump's Suspension



As a result of Twitter's decision to suspend President Trump's account will you delete your Twitter account?

Only 58% of respondents felt that the steps taken by social media platforms like Facebook and Snapchat related to President Trump's accounts were the right thing to do.

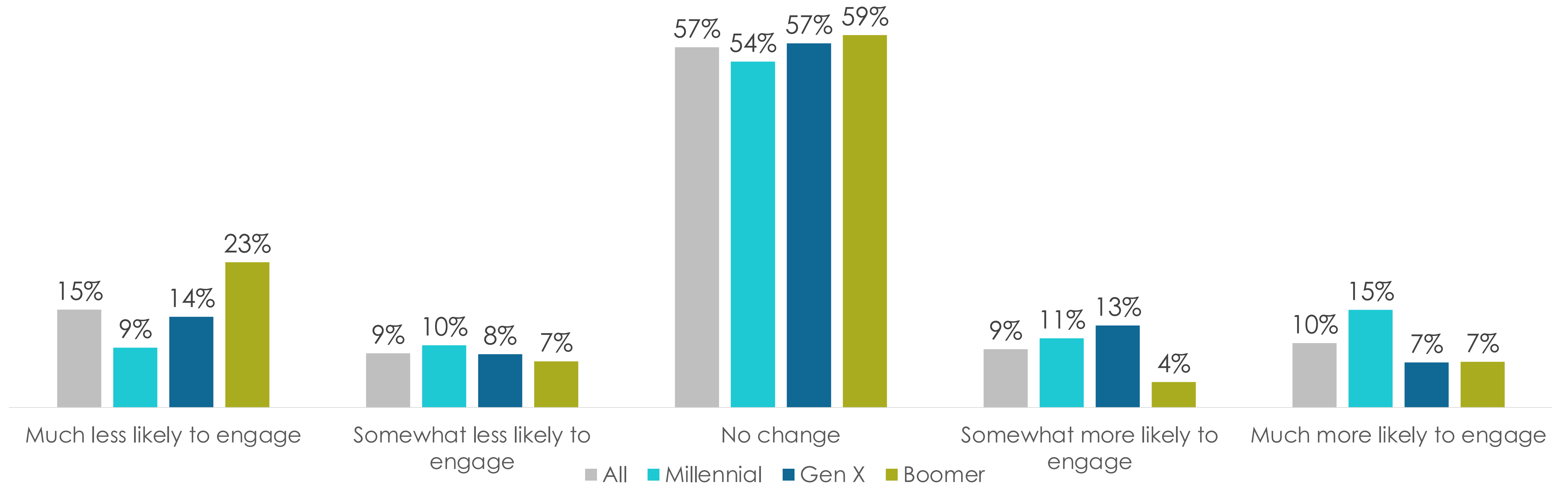
% Who Think the Deletion of Trump's Accounts Was the Appropriate Action for Major Social Media Websites to Take



Over this past weekend Facebook, Instagram, and Snapchat permanently deleted President Trump's accounts and YouTube suspended his channel indefinitely. Do you think this was an appropriate action for those websites to take?

Slightly more people (24%) are less likely to engage with sites that have banned Mr. Trump than those (19%) who are more likely to do so.

Likelihood to Engage With Websites That Deleted Trump's Accounts

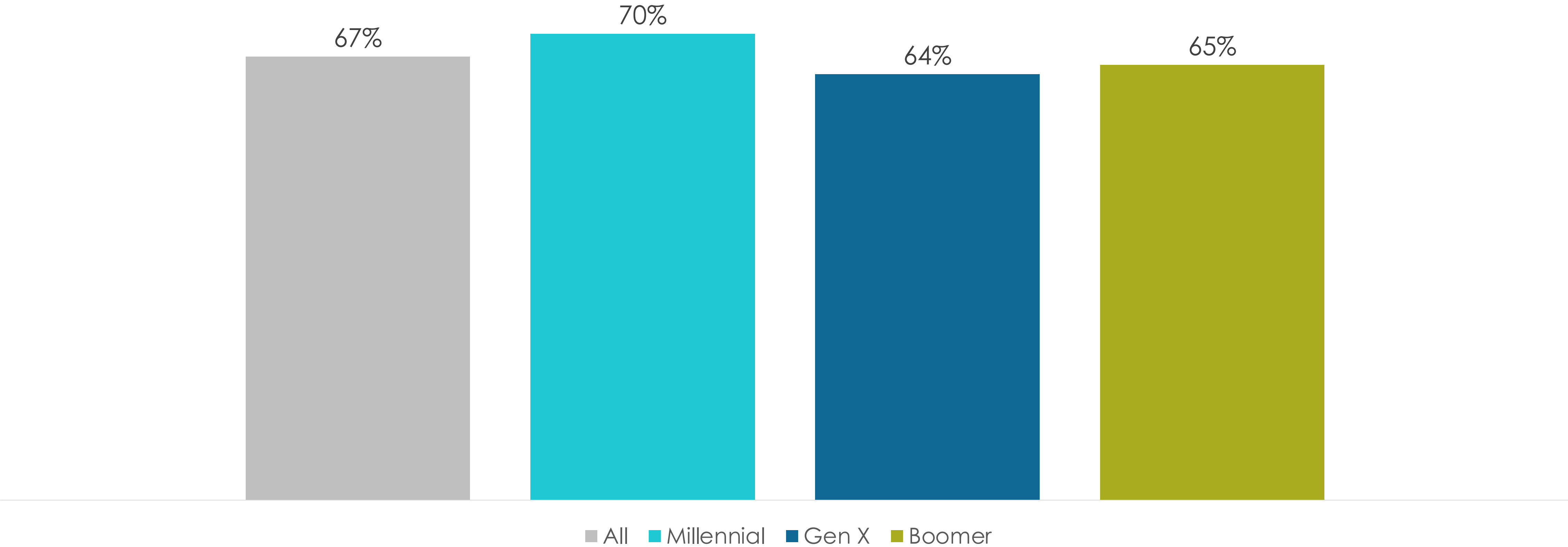


Are you more or less likely to engage with Facebook, Instagram, Snapchat and/or YouTube as a result of their decisions regarding Mr. Trump's accounts?



Two-thirds of respondents felt the steps that Apple and Google took to remove the Parler app from their stores and Amazon Web Services' decision to stop hosting the Parler website were appropriate actions.

% Who Think Amazon, Apple, and Google Did the Right Thing With Removing Parler



Last weekend, Amazon Web Services stopped hosting the Parler website and Apple and Google removed Parler from their app store because they felt Parler was not doing enough to control content calling for violence. Do you think Amazon, Apple and Google did the right thing?

# Summary

## Consumer Concerns

- Overall confidence in the U.S. economy is lagging. 56% of respondents lack confidence, while only 22% are somewhat or very confident.
- Confidence among men (29%) is nearly double that of women (15%).
- Among respondents with a heightened level of concern, the primary drivers of that concern are COVID (70%), the condition of the government (69%) and social unrest (60%).
- Despite the presence of the vaccine, more people (28%) have a greater level of concern about COVID than those who have seen their concern diminish (15%) over the past month.
  - Some of the concern is likely attributable to the fact that 27% of respondents feel the vaccine won't be available to them until sometime after June 1<sup>st</sup>.
  - Men (68%) are much more likely to believe they'll have access to the vaccine by April 1<sup>st</sup> than women (50%).
- The delay in the vaccine's distribution and the severity of the current infection rates have 50% of respondents thinking it will be 6 months or more before their lives return to normal. More than one-quarter (27%) thinking it will be a year or more.

# Summary - Continued

## Homes Are a Bright Spot

- Despite a relatively high concern about personal finances, 18% more households anticipate having a higher income in 2021 than a lower income.
  - Only Boomers, many of whom have likely recently retired or will retire in the coming year, are more prone to think their income will be down year-over-year.
- More than half (55%) of all homeowners feel the value of their homes appreciated in 2020, while only 14% feel their home's value declined.
- Two-thirds of respondents plan to make additional investments in their homes in the coming year.
- In addition to the 8% of current homeowners who plan to buy a new home this year, another 11% of homeowners are considering doing so.
- Of those planning a new home purchase, 79% anticipate increasing their investment level. Boomers (29%) are most likely to downsize.

# Summary - Continued

## Social Media Stance

- Approximately two-thirds (63%) of respondents feel that Twitter's decision to suspend President Trump's account permanently account was appropriate.
- 1 in 4 respondents plan to delete their Twitter account as a result of the ban on Mr. Trump.
  - Men (34%) are more than twice as likely as women (16%) to abandon their Twitter account.
- Only 58% of respondents felt that the steps taken by social media platforms like Facebook and Snapchat related to President Trump's accounts were the right thing to do.
- Slightly more people (24%) are less likely to engage with sites that have banned Mr. Trump than those (19%) who are more likely to do so.
- Two-thirds of respondents felt the steps that Apple and Google took to remove the Parler app from their stores and Amazon Web Services' decision to stop hosting the Parler website were appropriate actions.