



Home Retail Consumer Monitor

Presented February 9, 2021

Methodology

N = 669

MOE \pm 3.79%

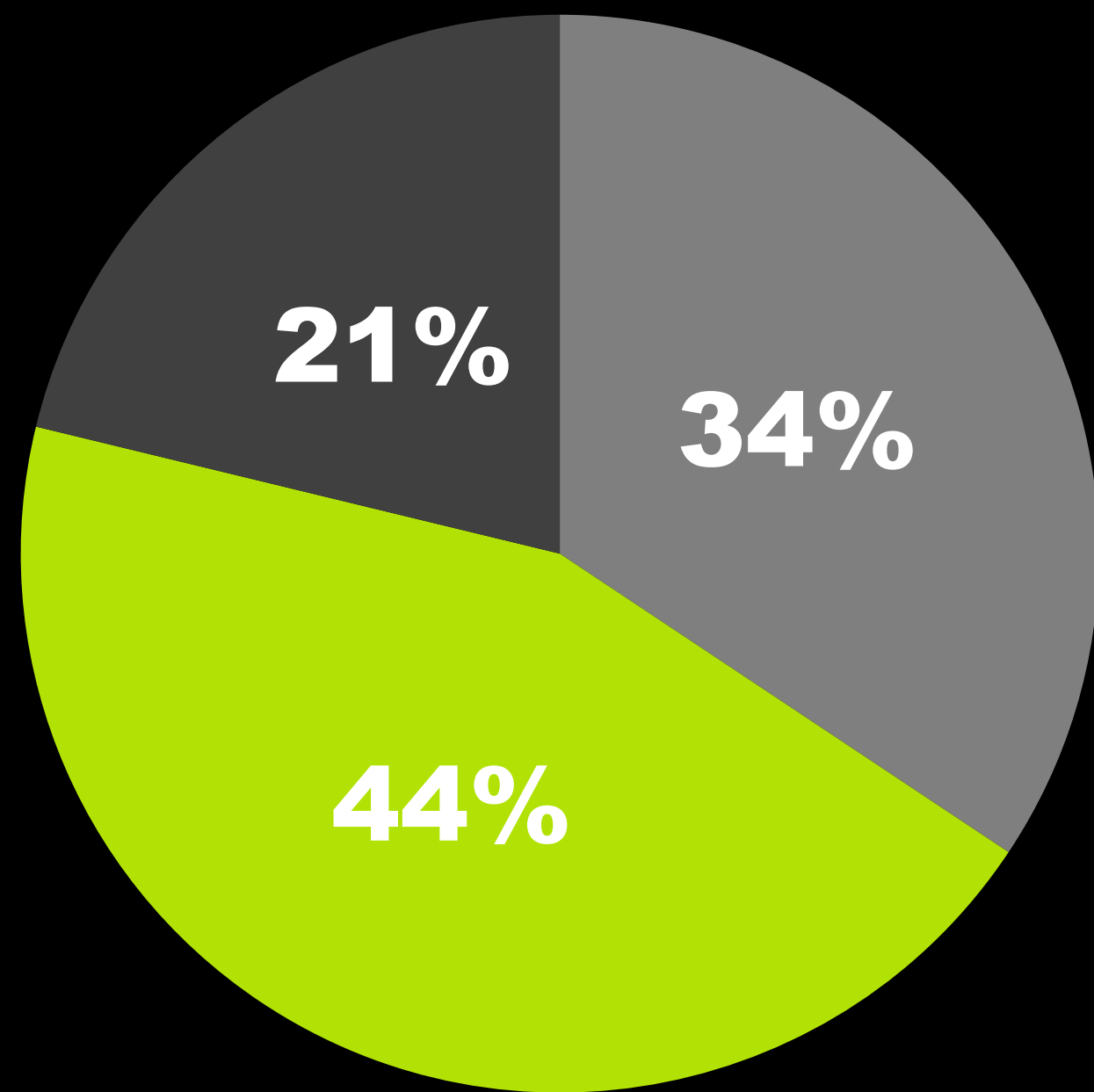
Panel: General Population

Collected: 2/2/21, 2/3/21

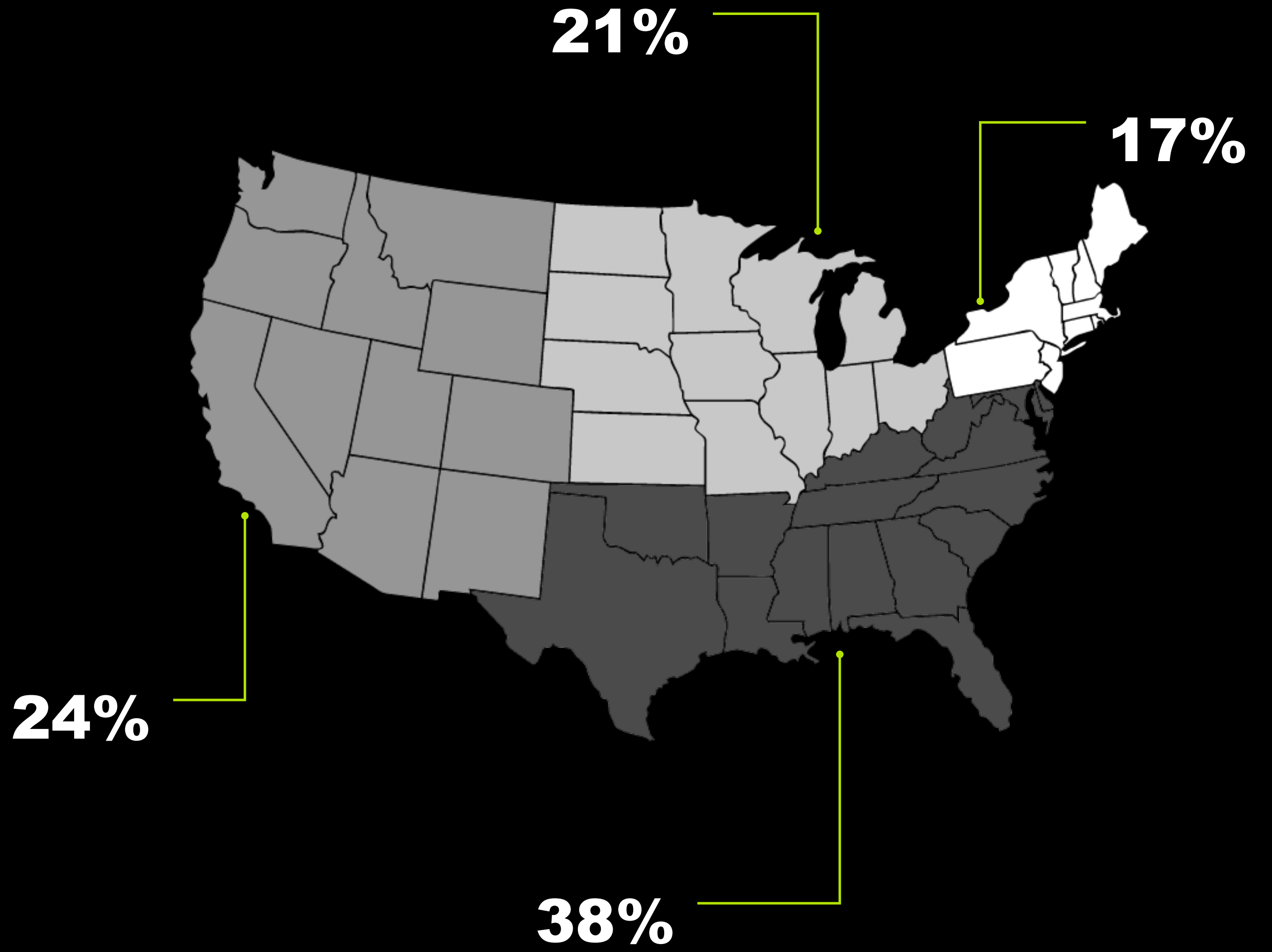


Panel Composition

Urbanicity

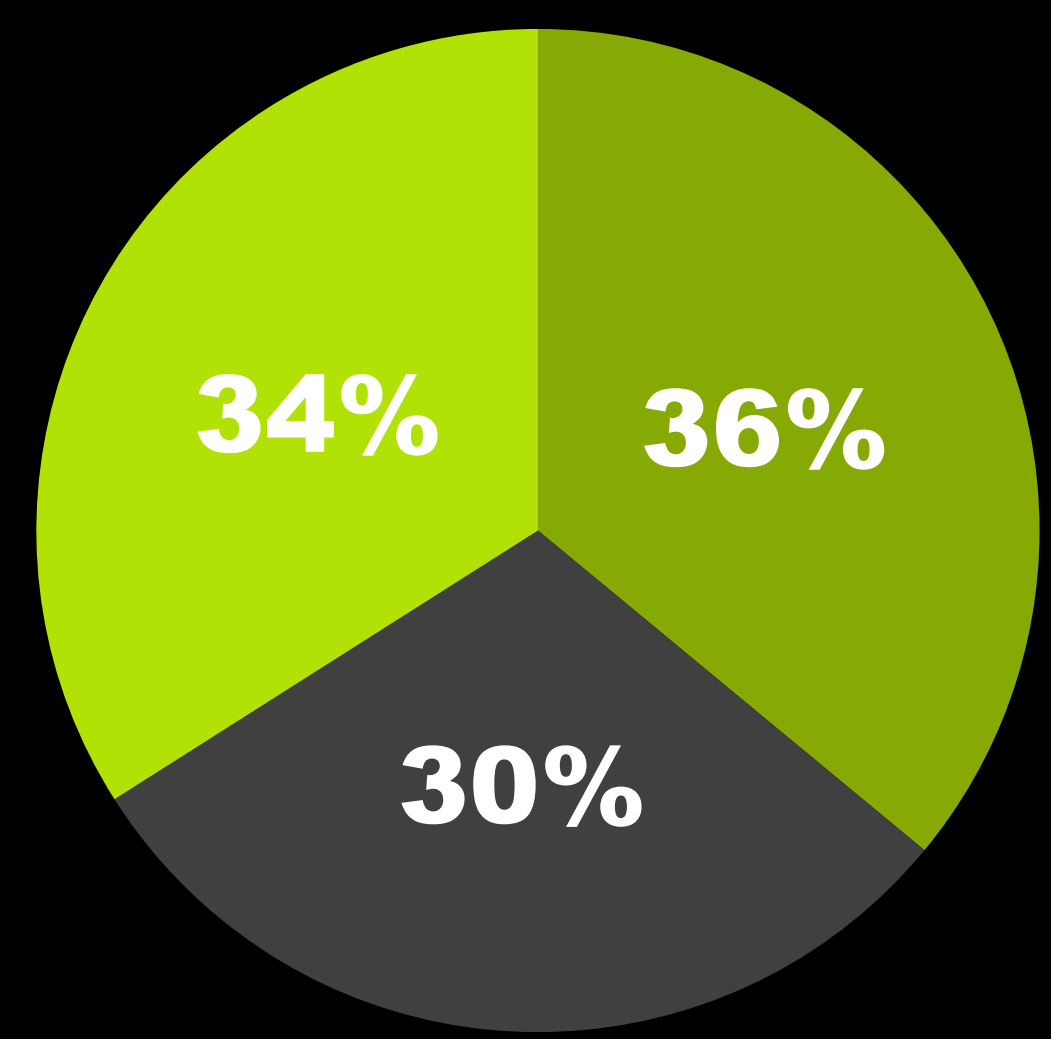


■ Urban ■ Suburban ■ Rural



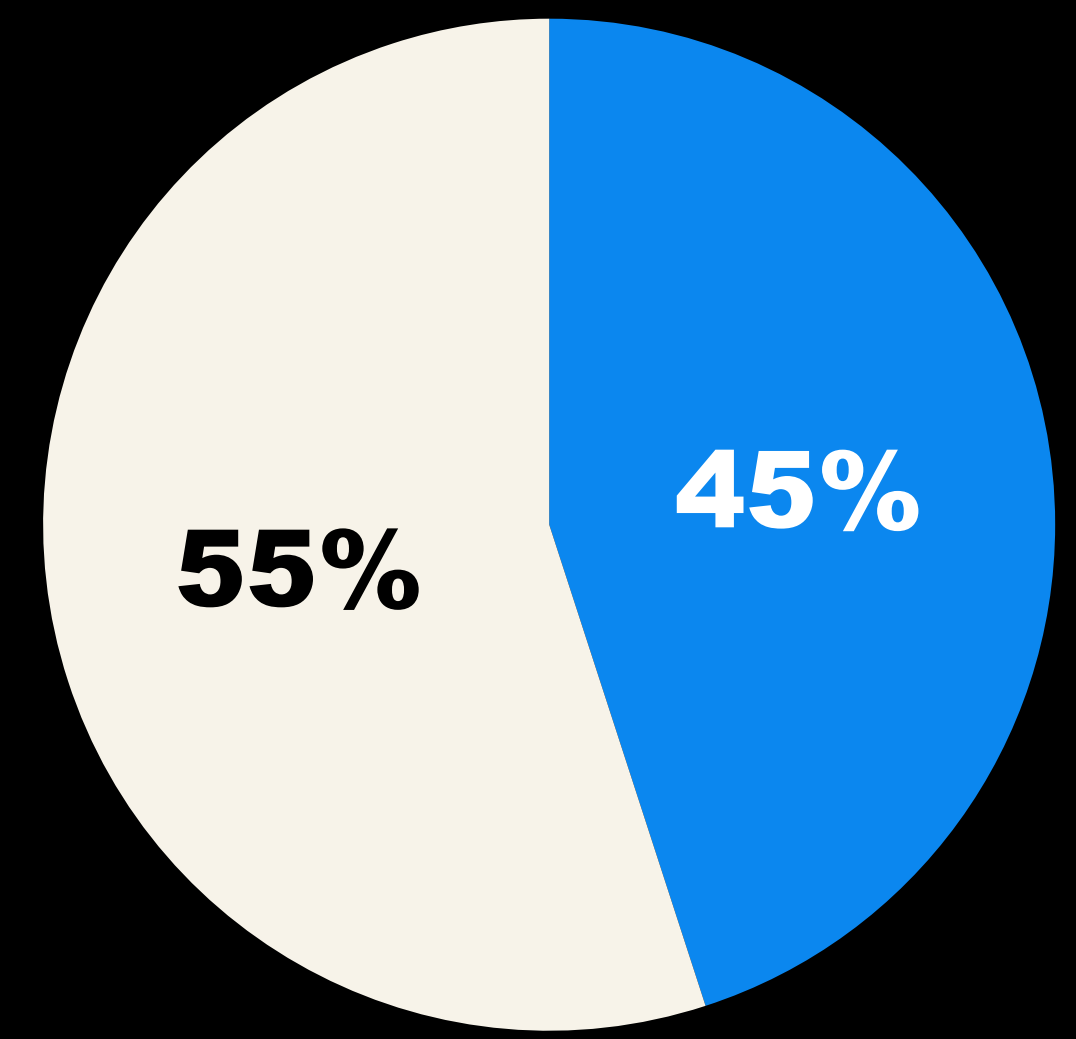


Generation



■ Millennial ■ Gen X ■ Boomer

Gender



■ Male ■ Female



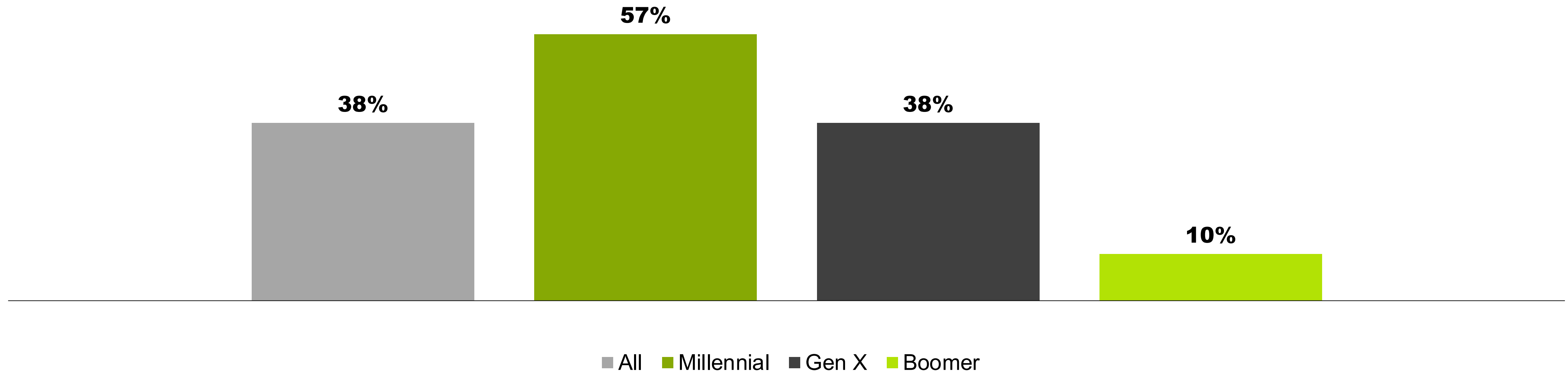
Home Improvement Shopping



The presence of COVID-19 has disrupted home improvement shopping behaviors.

38% of those shopping for home improvement products in the past 10 months, including 57% of Millennials, have had to try new products or brands as a result of out-of-stocks.

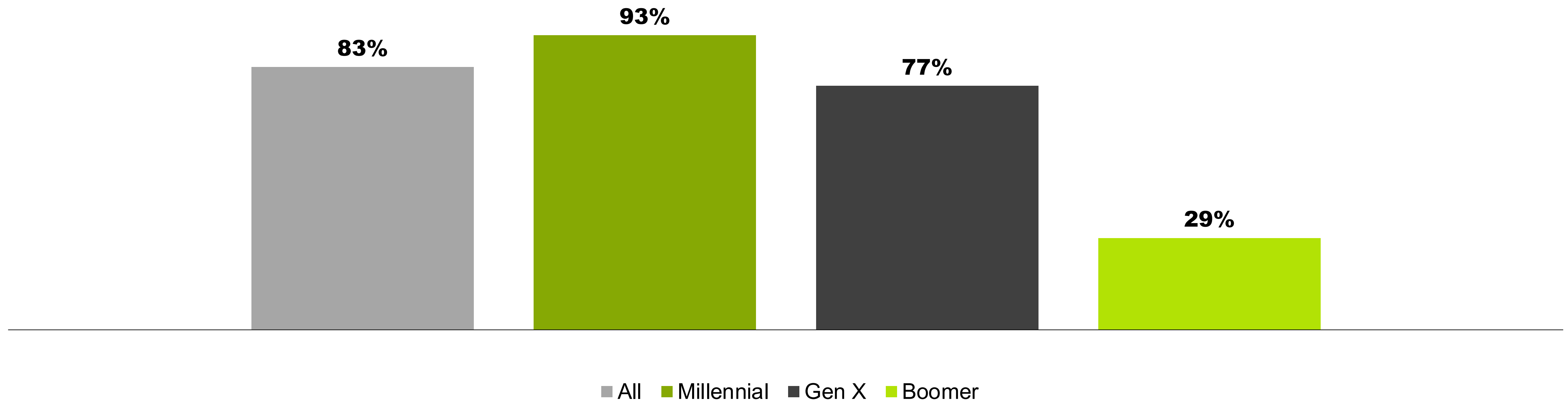
% Who Tried New Home Improvement Products/Brands Due To Out-of-stocks



As a result of out-of-stocks resulting from COVID-19, have you had to try any new products or brands of home improvement (tools and/or materials)?

Among those who've tried new home improvement products or brands, 83% have discovered something new that they prefer over what they used before.

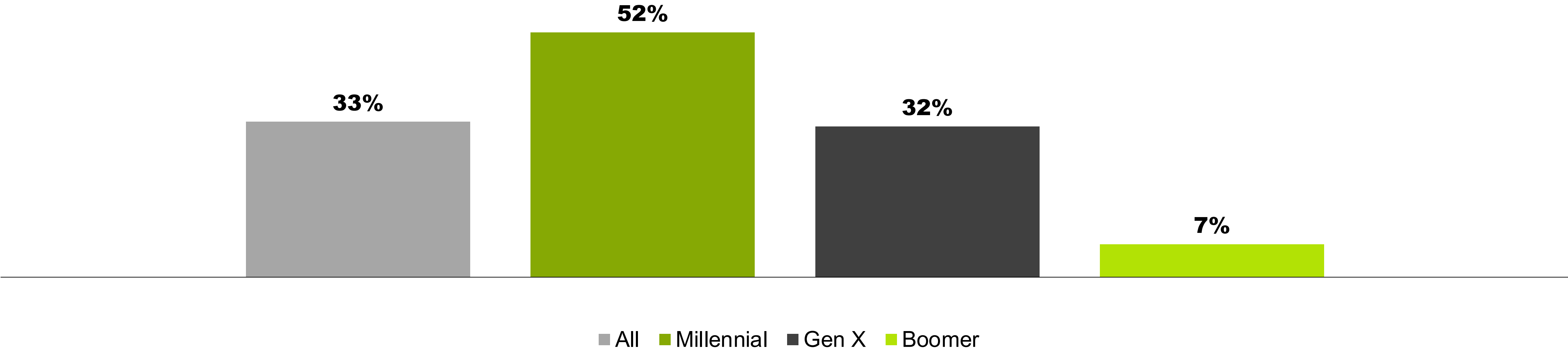
% Who Found New Home Improvement Brands They Prefer Over Items They Normally Purchased



Since trying new products or brands, have you found any you prefer over the home improvement (tools and/or materials) items you would normally have purchased?

Store closures, limited store capacities and other constraints have led one-third of respondents to try a new retail outlet.

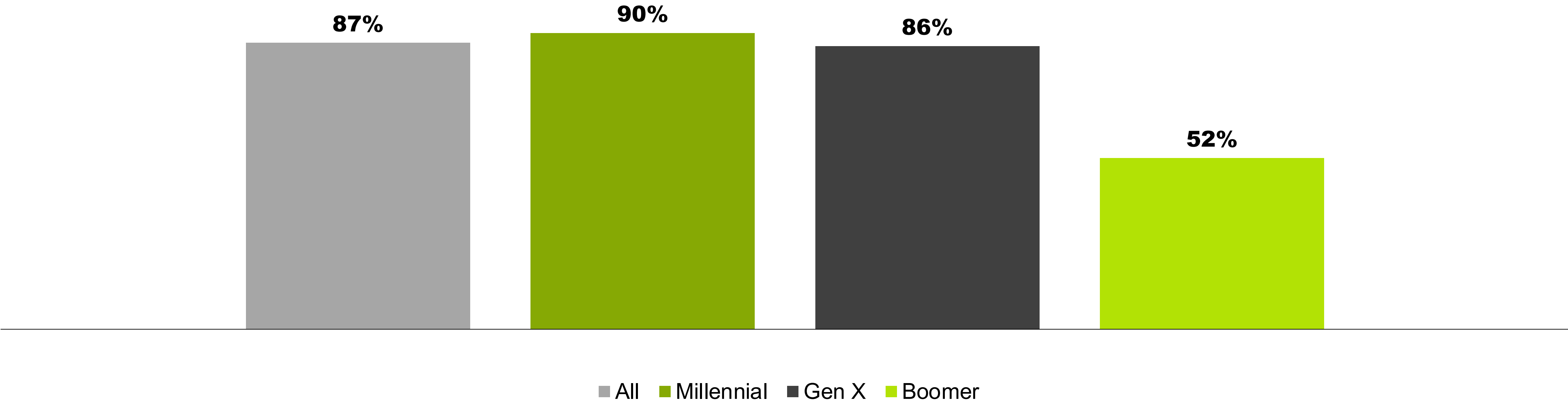
% Who Tried New Home Improvement Stores Due To COVID-19 Challenges



As a result of the challenges resulting from COVID-19, have you had to try any new retail stores for home improvement (tools and/or materials)?

Among those who have tried new outlets, a surprising 87% have found one they prefer over the store they normally shopped.

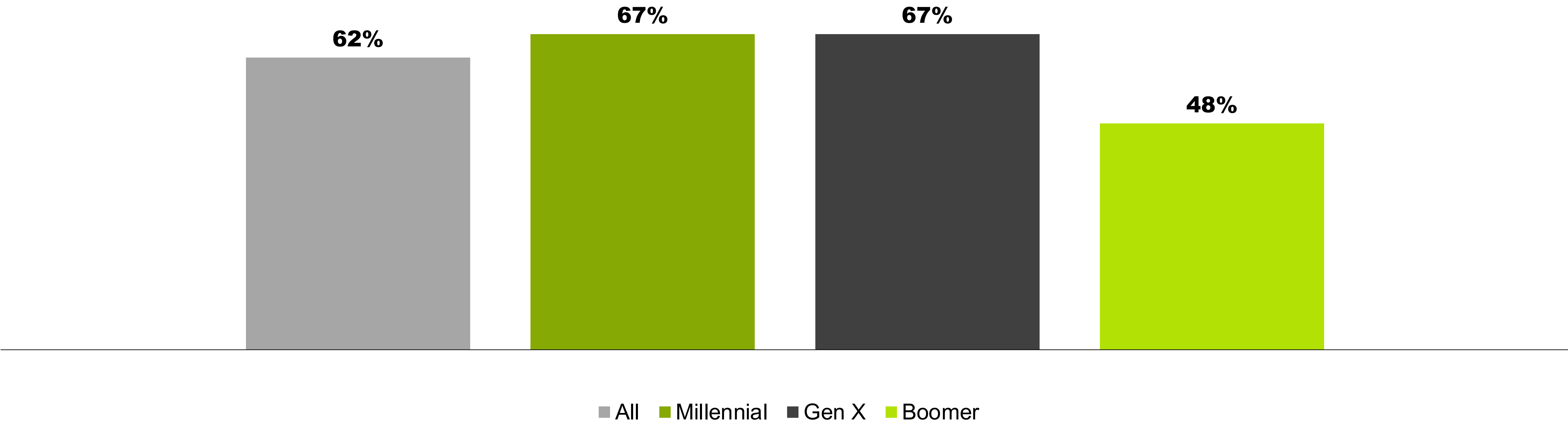
% Who Found New Home Improvement Store(s) They Prefer Over Stores Normally Shopped



As a result of trying new retail stores for home improvement (tools and/or materials), have you found any you prefer over the stores you would normally shop?

62% of those making home improvement purchases in the past 10 months have made at least a portion of their purchases online.

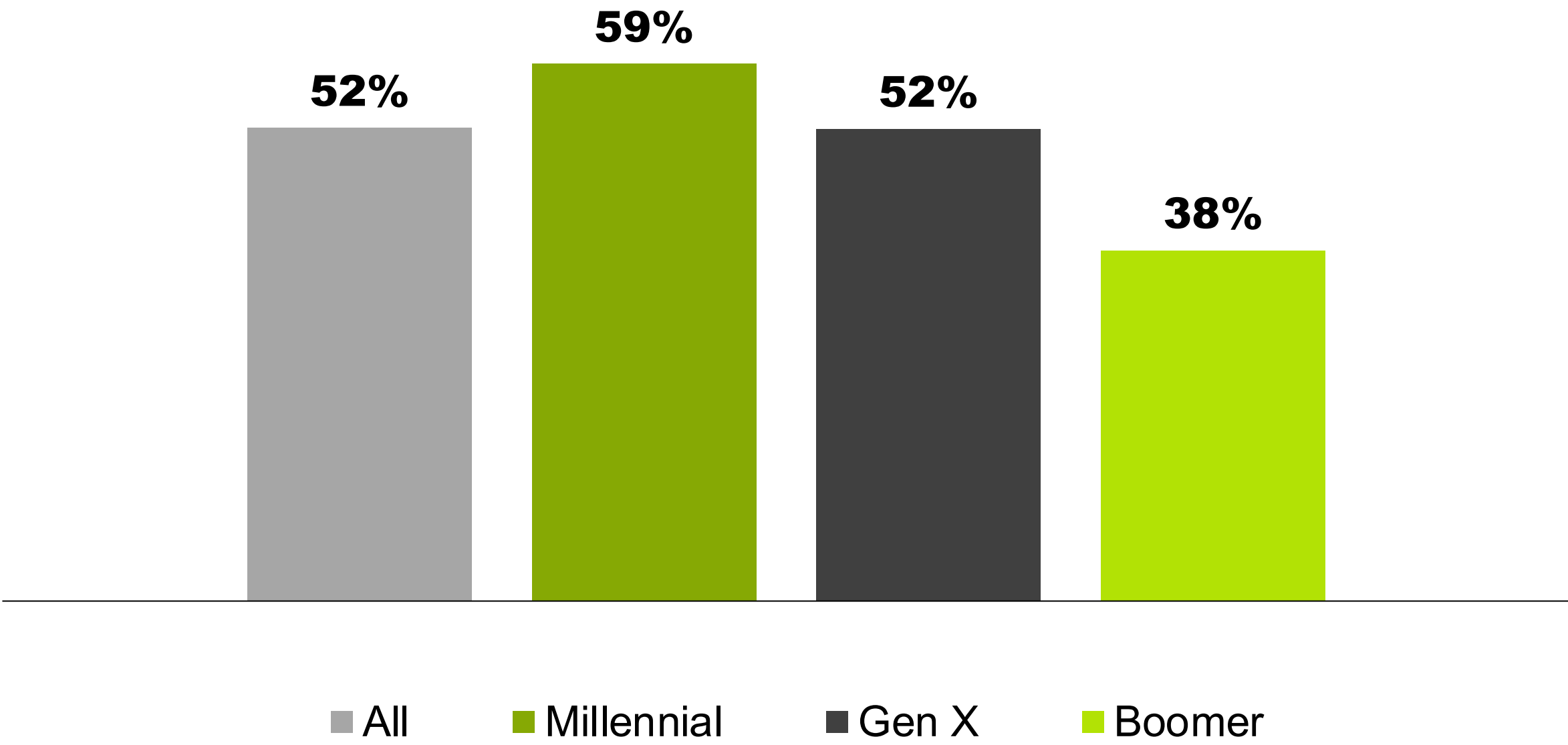
% Who Have Purchased Home Improvement Products Online In The Past 10 Months



Have you purchased any home improvement products online (for delivery or store pick-up) in the past 10 months?

Of those purchasing online, slightly more than half (52%) of their spending occurs there.

% Of Home Improvement Spending Done Online

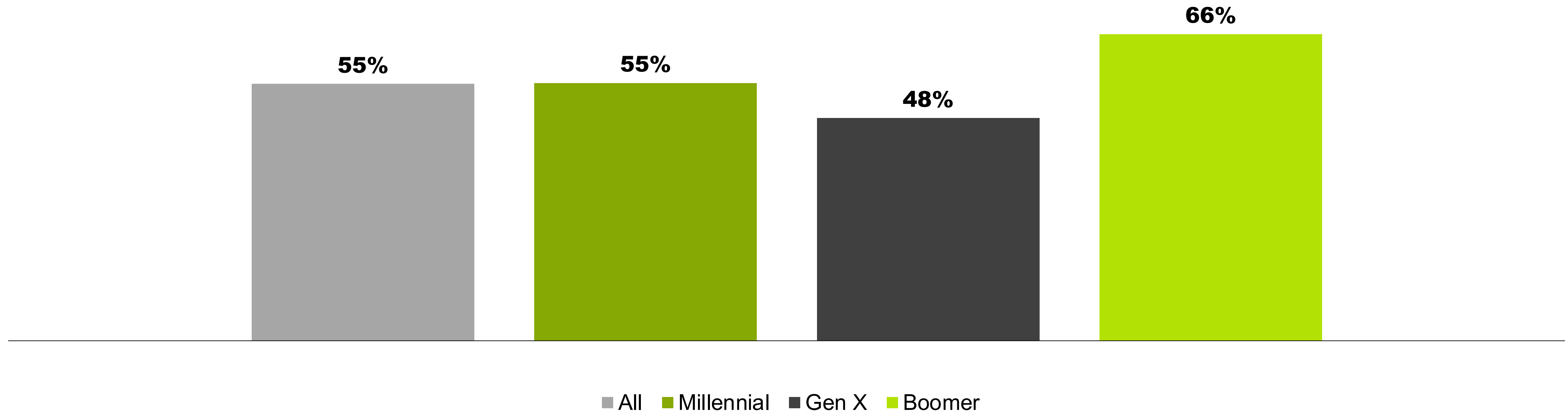


Approximately what % of your home improvement product spending has been made online versus in a store? Total must equal 100%.



Of online orders, 55% are for delivery while the remaining 45% are for store pick-up.

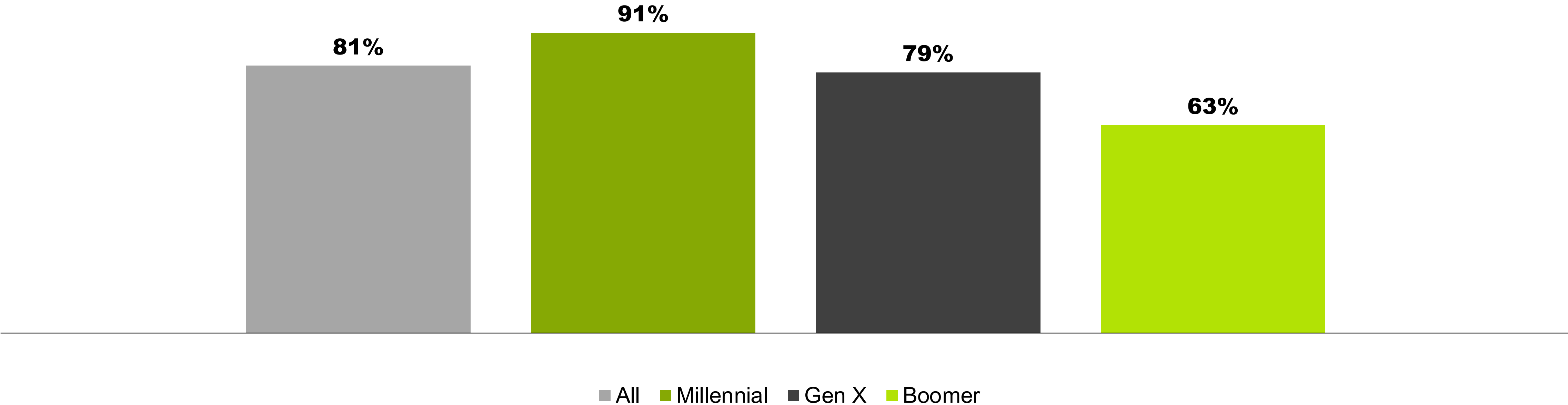
Online Home Improvement Shopping Method Used: Delivery



Of the home improvement product purchases that you've made online, approximately what % have been made for home delivery versus pick up at the store? Total must equal 100%

19% of those making online home improvement purchases in the last 10 months had never done so before.

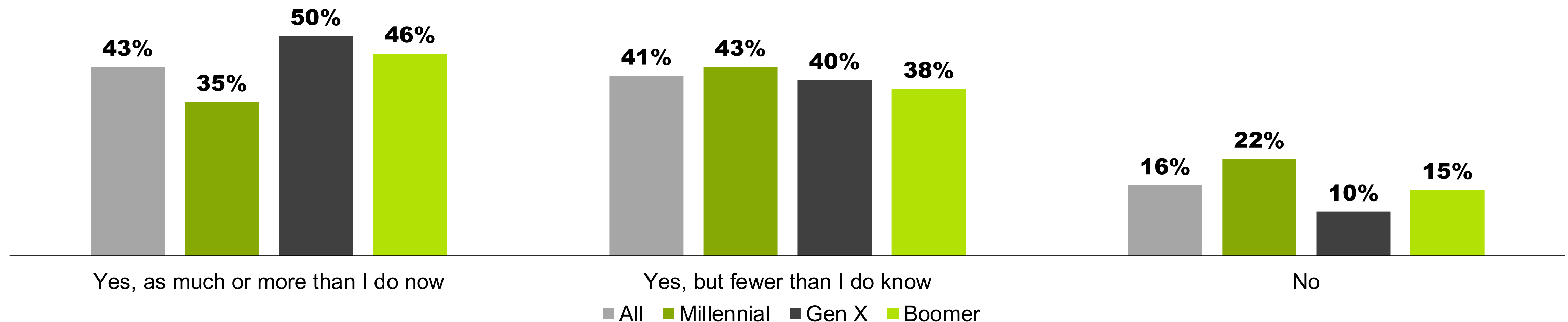
% Who Did Buy Home Improvement Products Online Prior To COVID-19



Did you purchase home improvement products online prior to the COVID pandemic?

Once COVID-19 is brought under control, 16% of those who've recently made online purchases will abandon the practice, 41% will continue but at a lower rate and 43% will continue or increase their rate of online purchases.

Online shopping behavior once COVID is brought under control



Will you continue to purchase home improvement products online once COVID is brought under control?

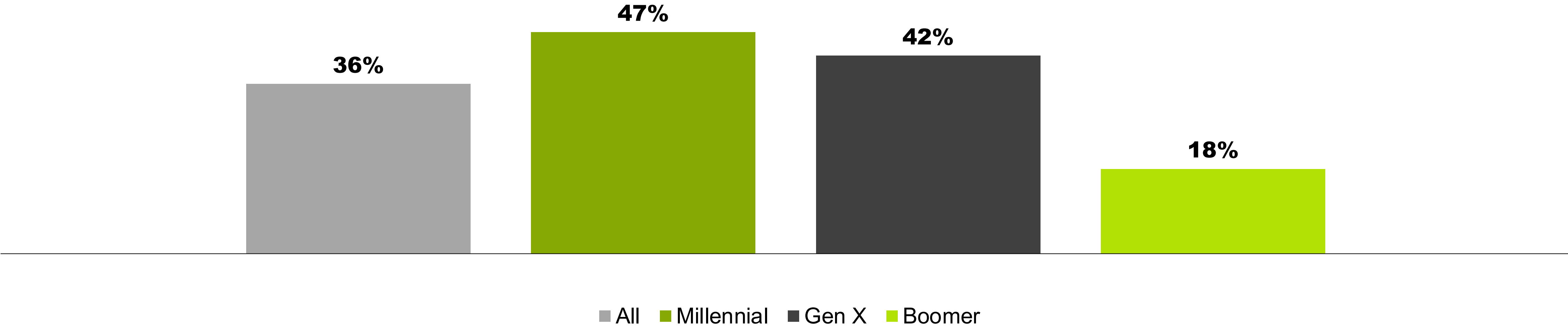


Work from Home



36% of respondents (nearly three-quarters of the salaried employees in the sample) have worked from home at some point during the pandemic.

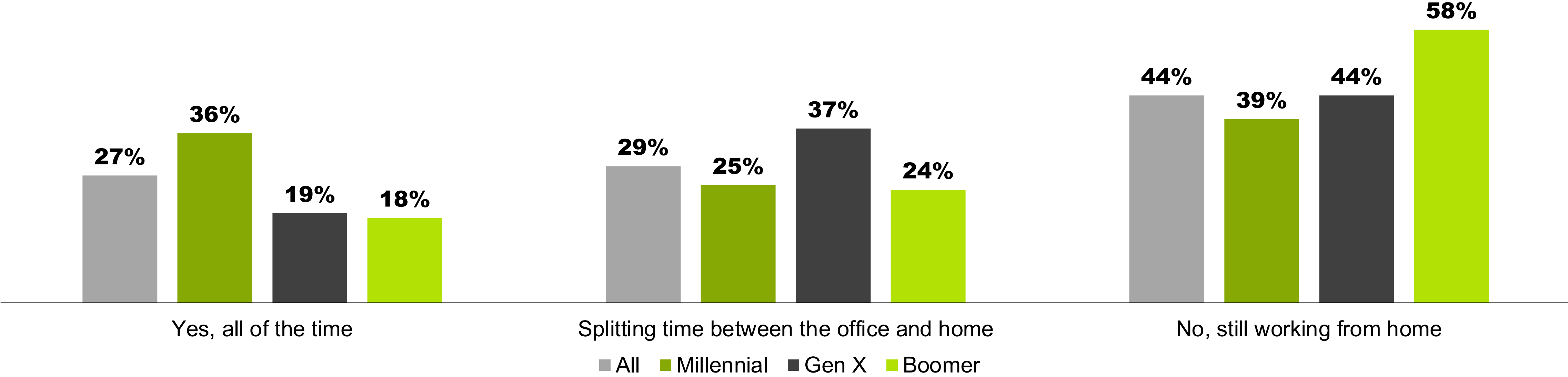
% Who Have Moved Work From The Office To Home During Pandemic



At any time during the COVID pandemic have you had to move from working in an office to working from your home?

Among those who have worked at home, 27% are back in their office full-time while 44% continue to do all of their work from home.

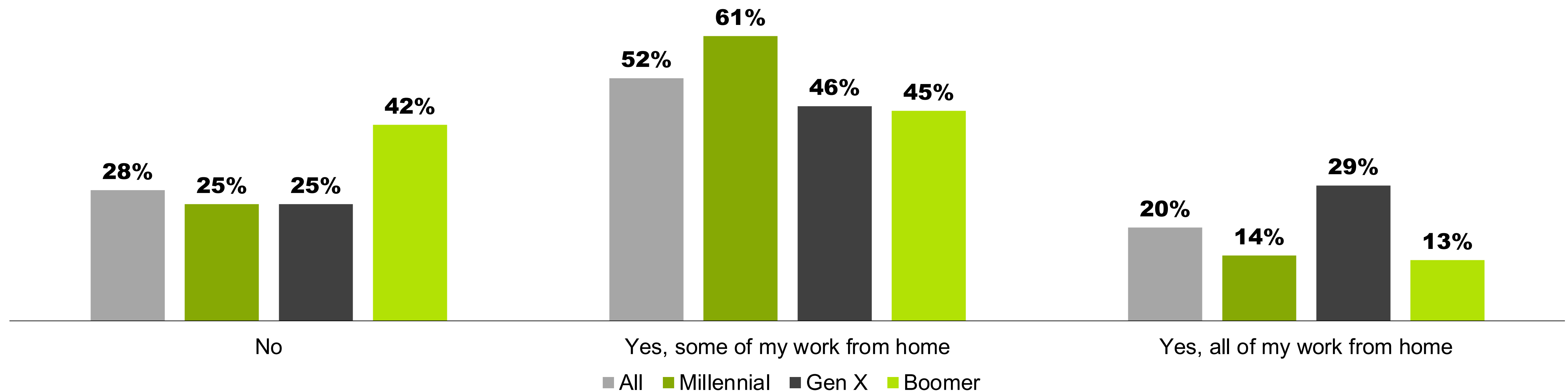
Back Working In The Office Now



Are you back working in your office now?

The majority of people (52%) who have worked from home think they'll have the opportunity to continue to do so a portion of the time. One in five believe they'll be able to do so permanently.

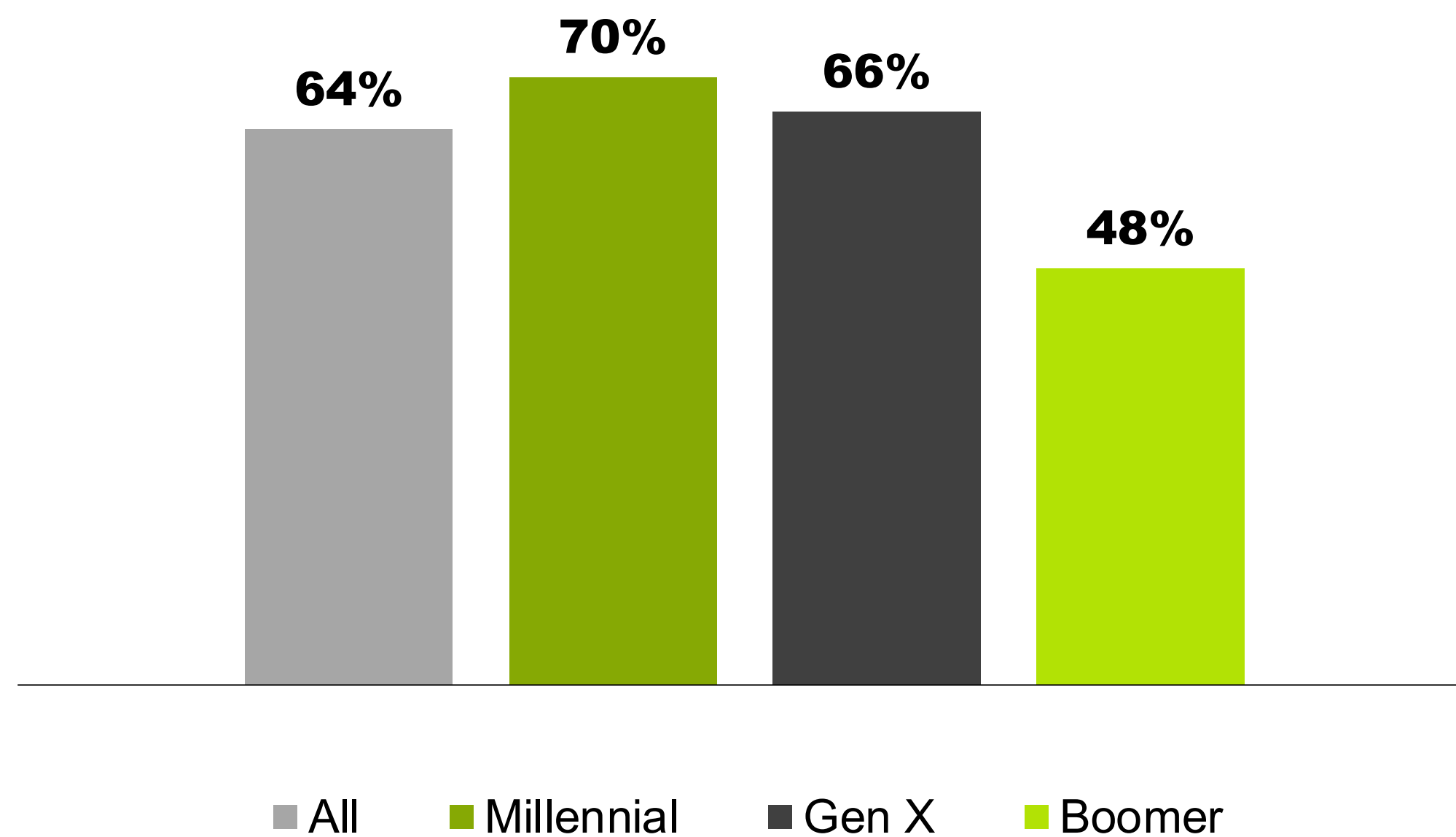
Will Have The Option To Do Some/All Work From Home



Do you think when the COVID pandemic is brought under control that you'll have an option to do some or all of your work from home?

64% of those who have experienced working from home would like to do so all the time.

% Who Would Like To Work From Home All The Time

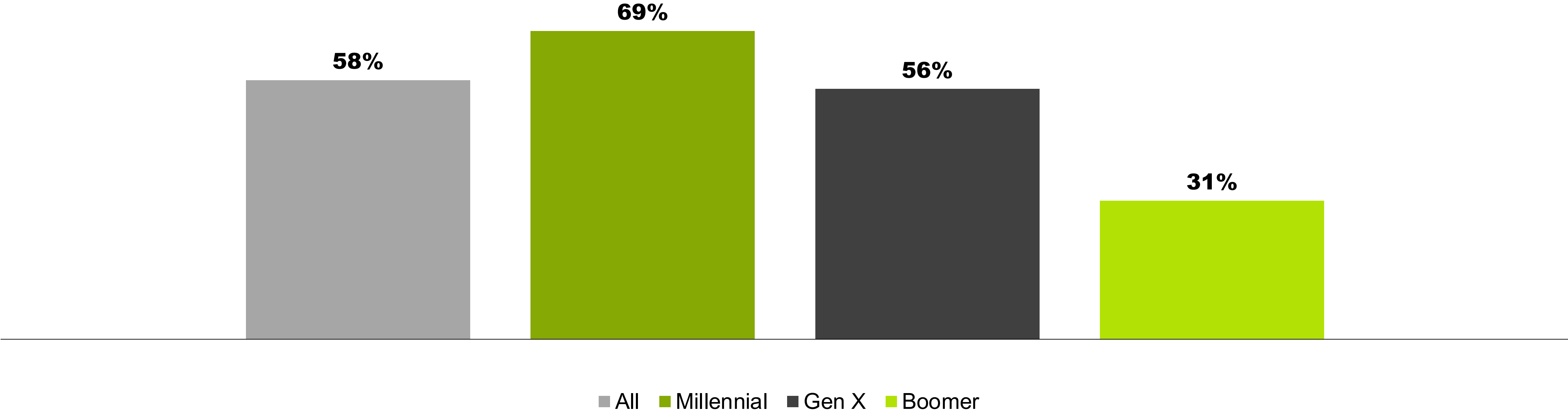


Would you like to be able to work from home all the time?



If working from home permanently were an option, more than half of respondents (58%) would relocate.

% Who Would Move To A New Area If Able To Work From Home All the Time



If you could work from home all of the time would you move to a new area?



COVID-19
VACCINATION
CENTER
↑

NO APPT'S
WALK UP'S

COVID-19 Vaccinations

GLOUCESTER COUNTY
COVID-19 VACCINE SITE
RCSJ COLLEGE CENTER
→

Rowan
Medicine

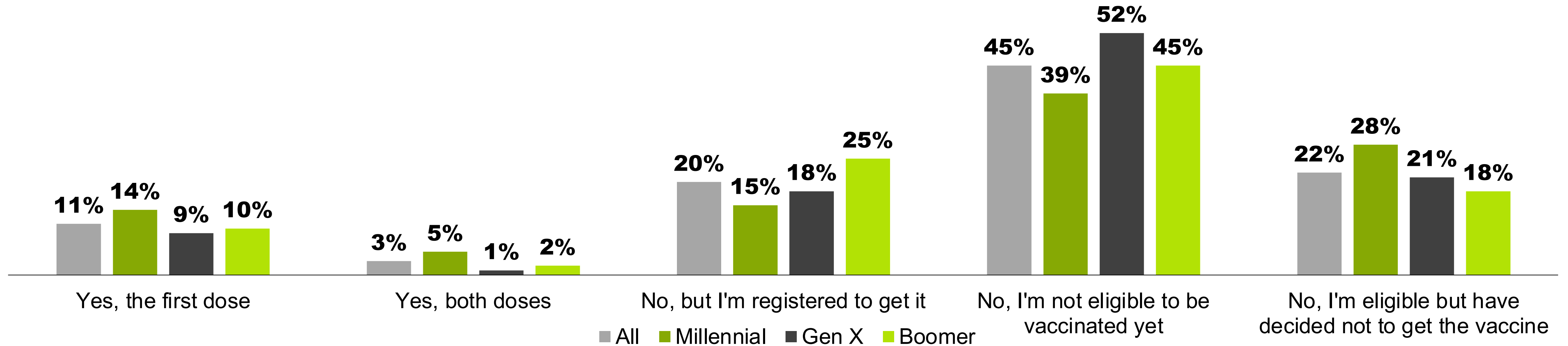
Rowan University
Division of Health Services

GLOUCESTER COUNTY
COVID-19 VACCINE SITE
PARKING
←



11% of respondents have had their first dose of the COVID vaccine and 3% are fully vaccinated.

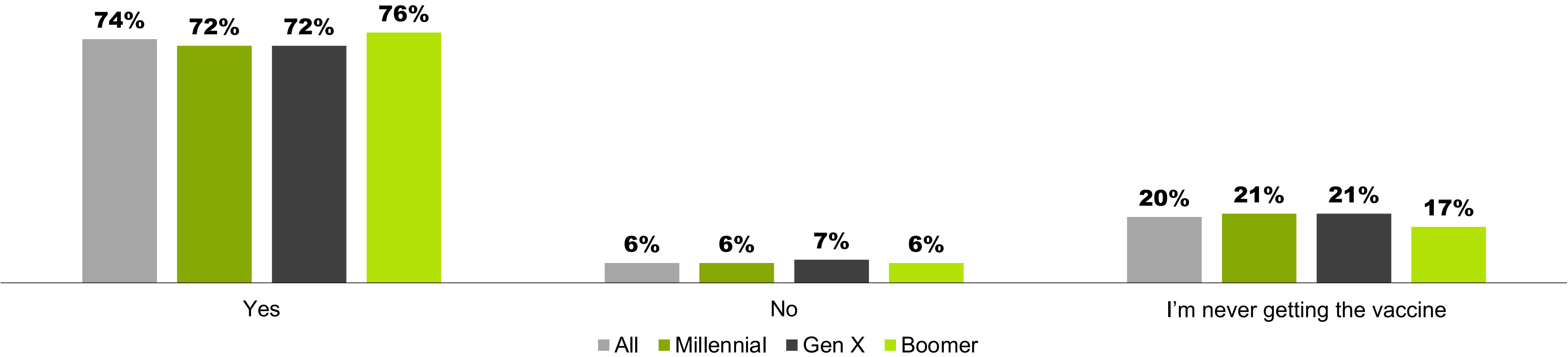
COVID-19 Vaccine Status



Have you received the COVID-19 vaccine yet?

The vast majority (74% of 80%) of those at least somewhat likely to get the vaccine appreciate the importance of maintaining safety protocols after vaccination. 20% are set against ever getting the vaccine.

Continuing Safe Behaviors Once Receiving Vaccine



Once you've had both doses of the vaccine will you continue to practice safe behaviors like wearing a mask and social distancing?

Summary

Home Improvement Shopping

- 38% of those shopping for home improvement products in the past 10 months, including 57% of Millennials, have had to try new products or brands as a result of out-of-stocks.
 - Among those who've tried new home improvement products or brands, 83% have discovered something new that they prefer over what they used before.
- Store closures, limited store capacities and other constraints have led one-third of respondents to try a new retail outlet.
 - Among those who have tried new outlets, a surprising 87% have found one they prefer over the spot they normally shopped.
- 62% of those making home improvement purchases in the past 10 months have made at least a portion of their purchases online.
 - Of those purchasing online, slightly more than half (52%) of their spending occurs there.

Summary

Home Improvement Shopping – Continued

- Of online orders, 55% are for delivery while the remaining 45% are for store pick-up.
- 19% of those making online home improvement purchases in the last 10 months had never done so before.
- Once COVID-19 is brought under control, 16% of those who've recently made online purchases will abandon the practice, 41% will continue but at a lower rate and 43% will continue or increase their rate of online purchases.

Summary

Work From Home

- 36% of respondents (nearly three-quarters of the salaried employees in the sample) have worked from home at some point during the pandemic.
- Among those who have worked from home, 27% are back in their office full-time, while 44% continue to do all of their work from home.
- The majority of people (52%) who have worked from home think they'll have the opportunity to continue to do so a portion of the time. One in five believe they'll be able to do so permanently.
- 64% of those who have experienced working from home would like to do so all of the time.
- If working from home permanently were an option, more than half of respondents (58%) would relocate.

Summary

COVID-19 Vaccinations

- 11% of respondents have had their first dose of the COVID vaccine, and 3% are fully vaccinated.
- The vast majority (74% of 80%) of those at least somewhat likely to get the vaccine appreciate the importance of maintaining safety protocols after vaccination.
 - 20% are set against ever getting the vaccine.

