



Home Retail Consumer Monitor

Presented February 9, 2021

Methodology

N = 649

MOE \pm 3.85%

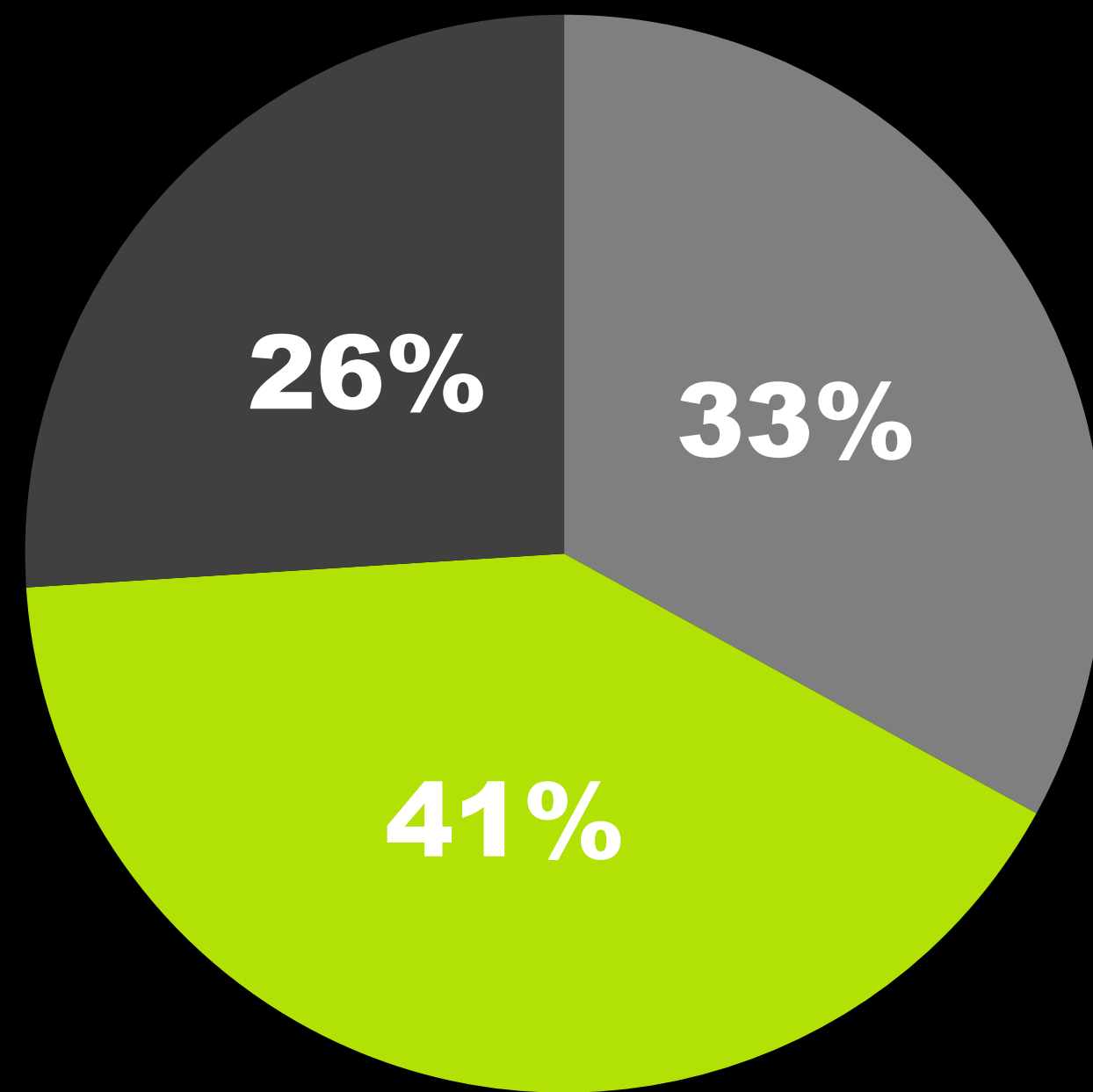
Panel: General Population

Collected: 2/9/21, 2/10/21

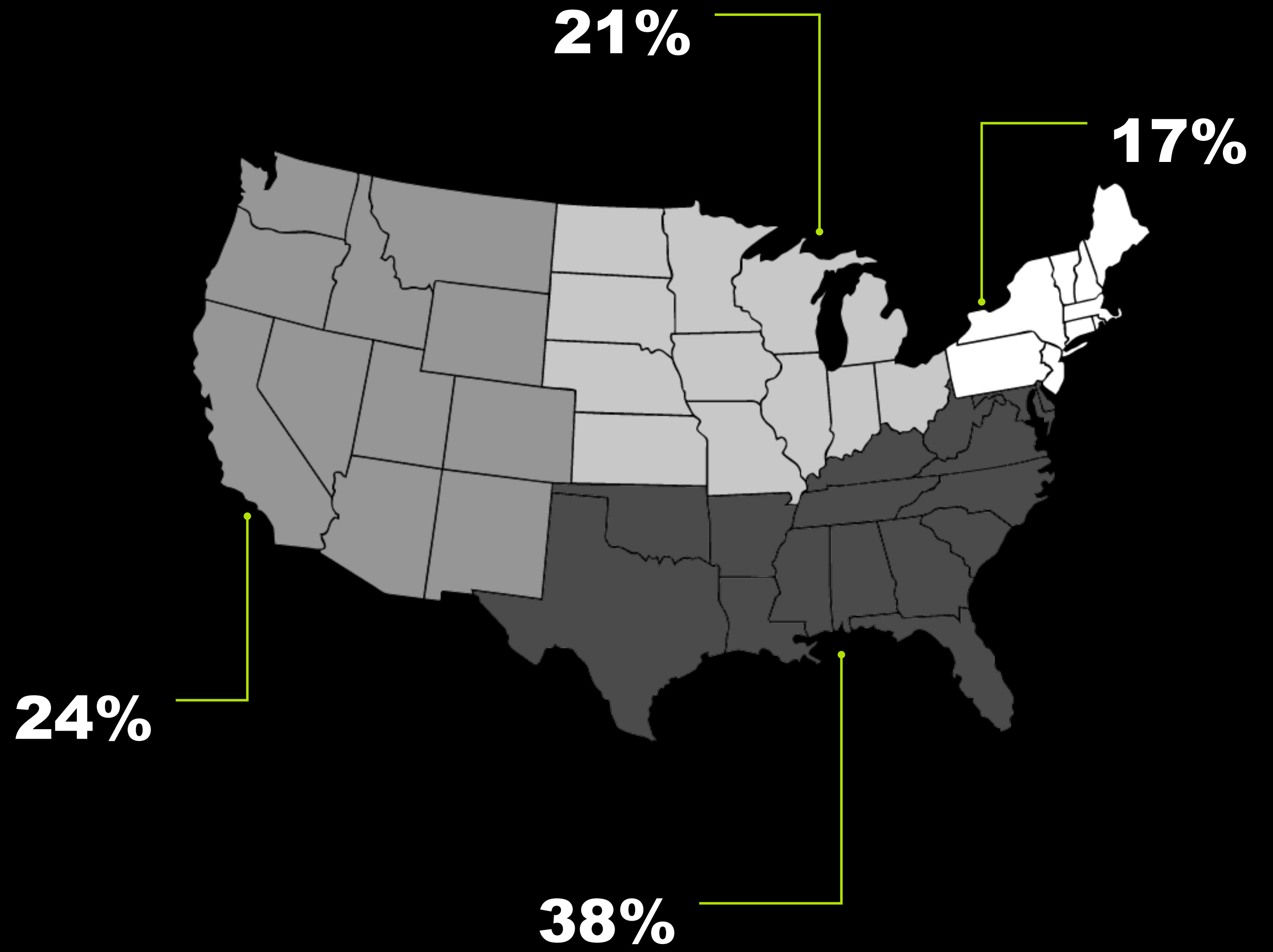


Panel Composition

Urbanicity

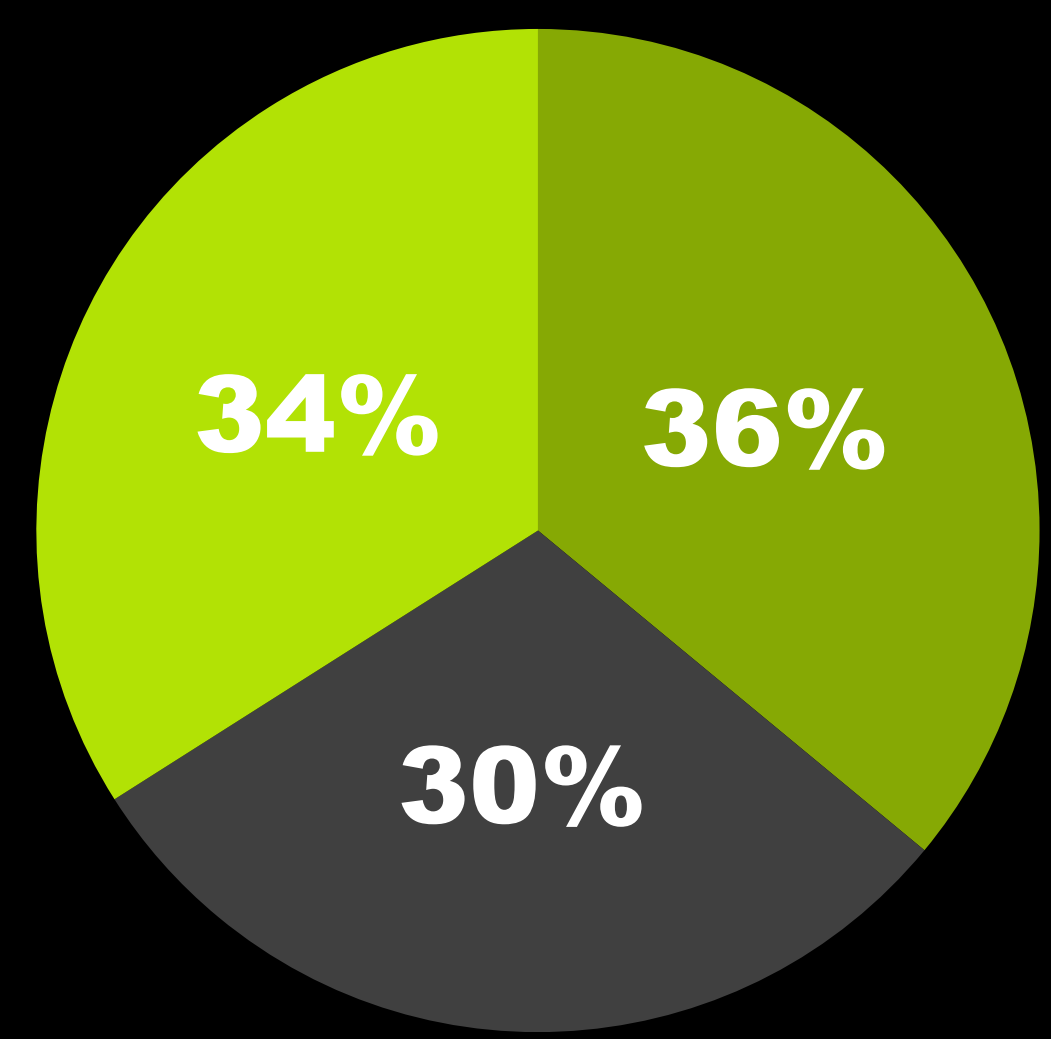


■ Urban ■ Suburban ■ Rural



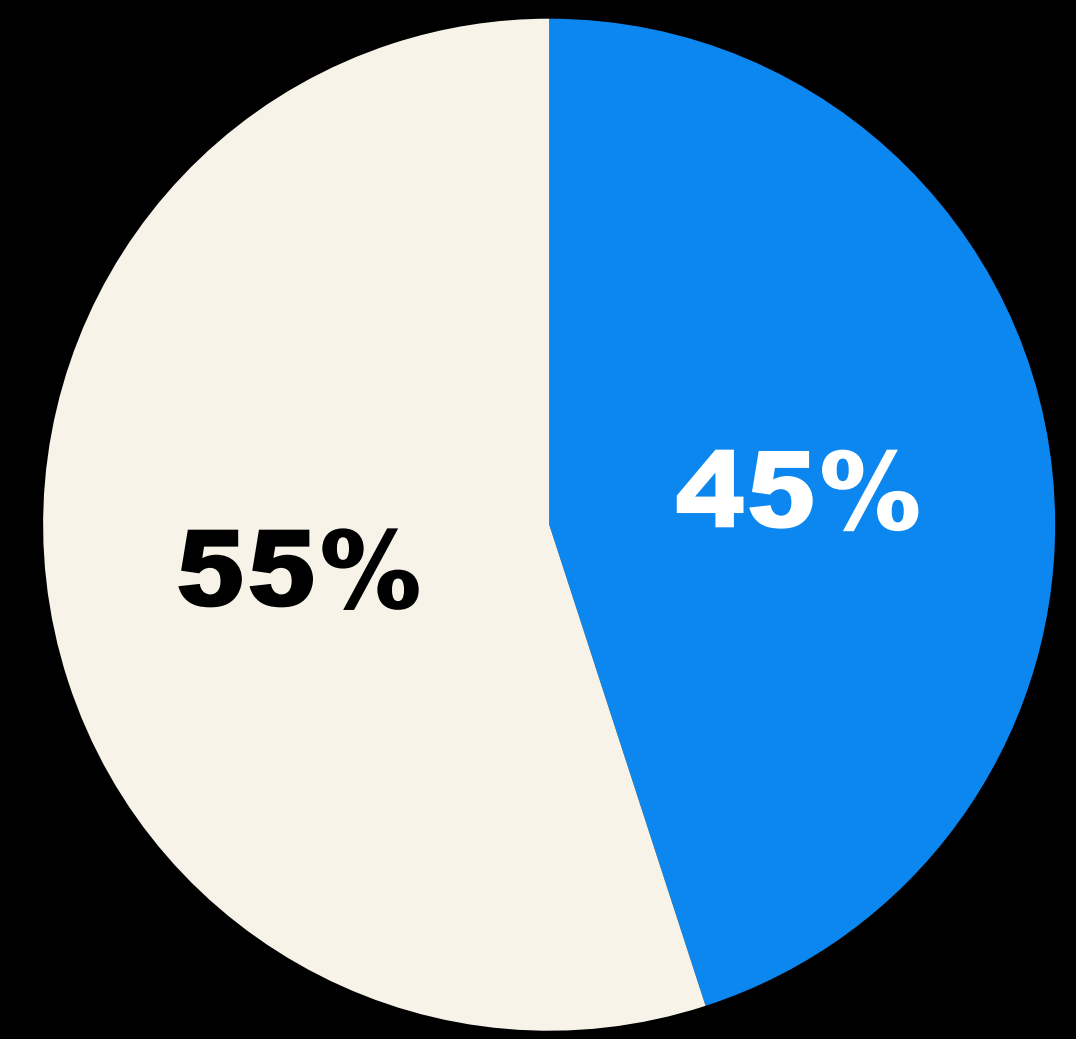


Generation



■ Millennial ■ Gen X ■ Boomer

Gender



■ Male ■ Female



2021 Travel

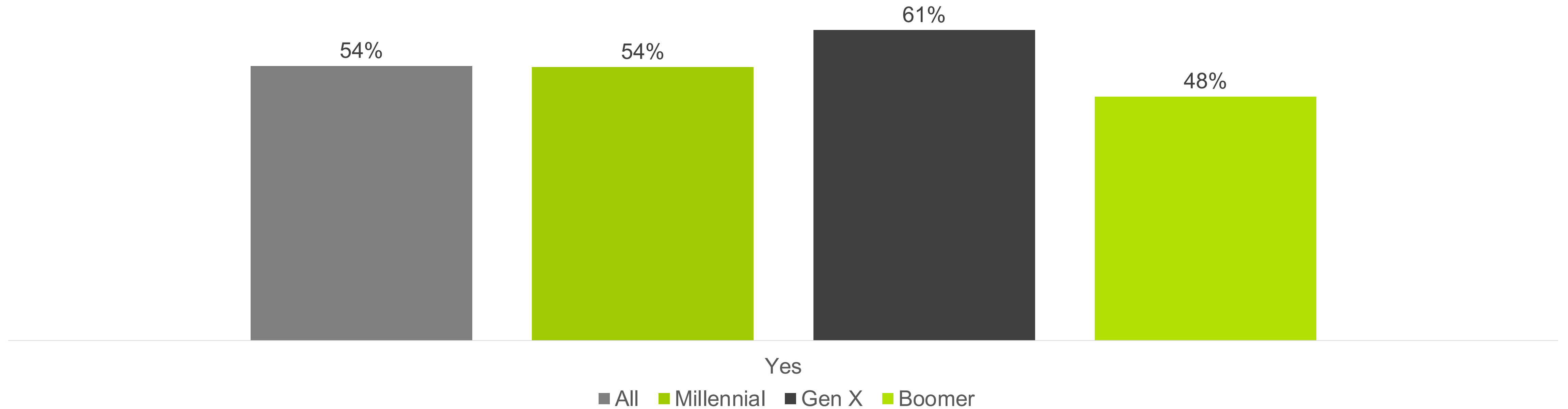


Keep your distance
← →
1,5 m

Keep Y
FA

More than half of all respondents (54%) have canceled personal travel plans because of COVID-19.

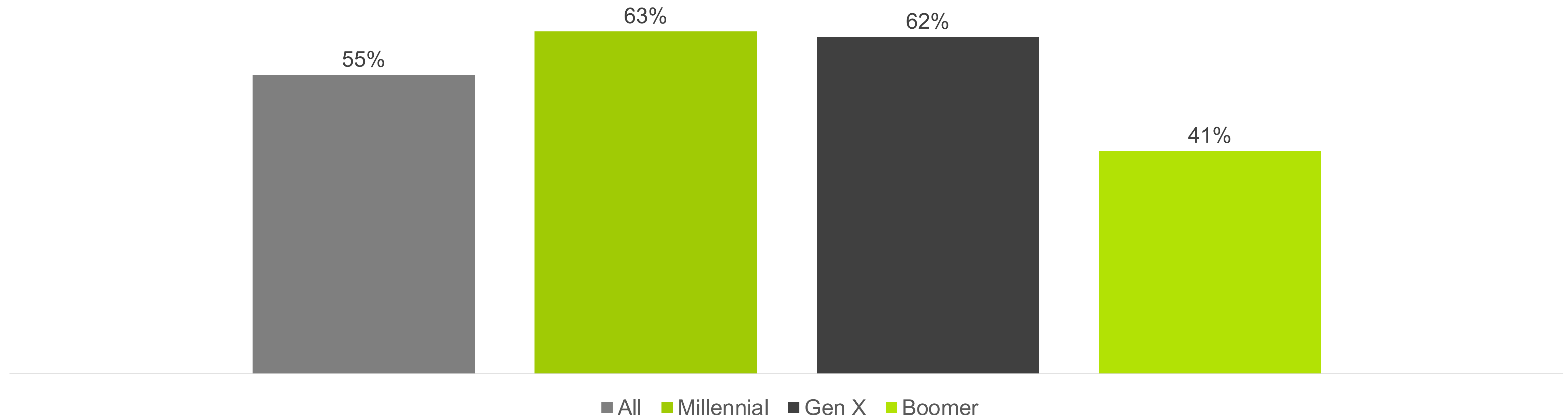
Canceled travel due to COVID-19



Have you canceled personal travel in the past 10 months due to COVID-19?

Not surprisingly, a similar number (55%) are excited or very excited to begin traveling again.

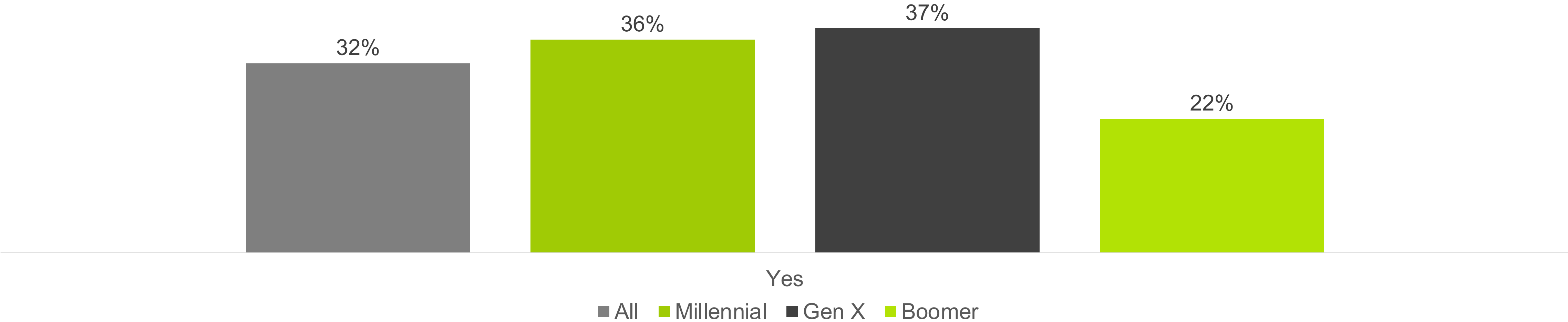
Excited to travel top 2 box



How excited are you for the opportunity to travel again?

Nearly one-third (32%) of respondents have travel credits or money that they have specifically earmarked for travel.

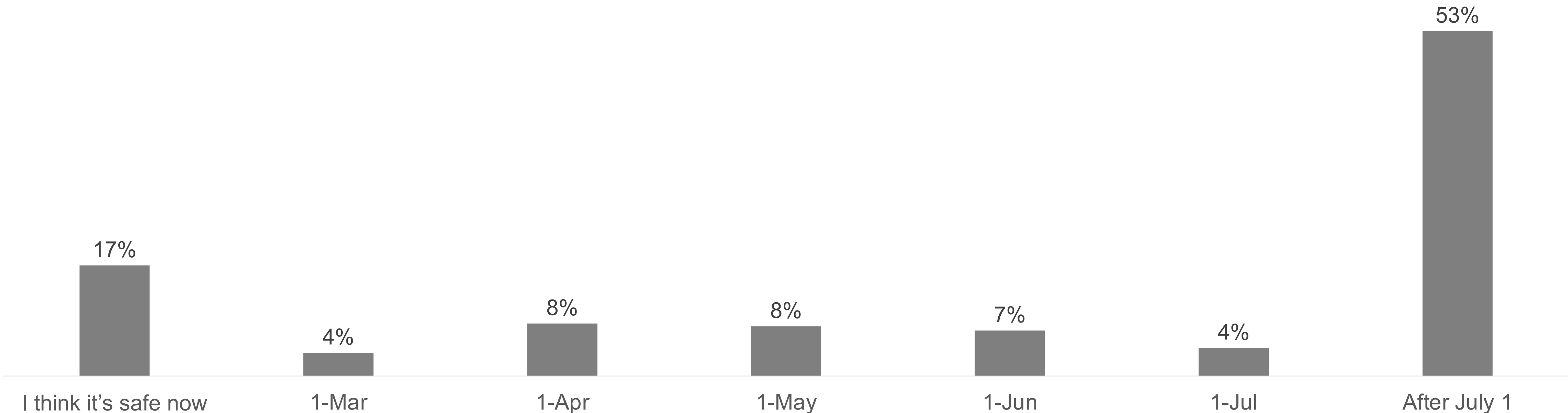
Money or credits saved for travel



Do you have money or credits with an airline, hotel, cruise line etc. that you've saved to use for traveling when it's safer?

While nearly 1 person in 5 (17%) feels it is safe to travel now, 53% think safe travel won't be available until after July 1.

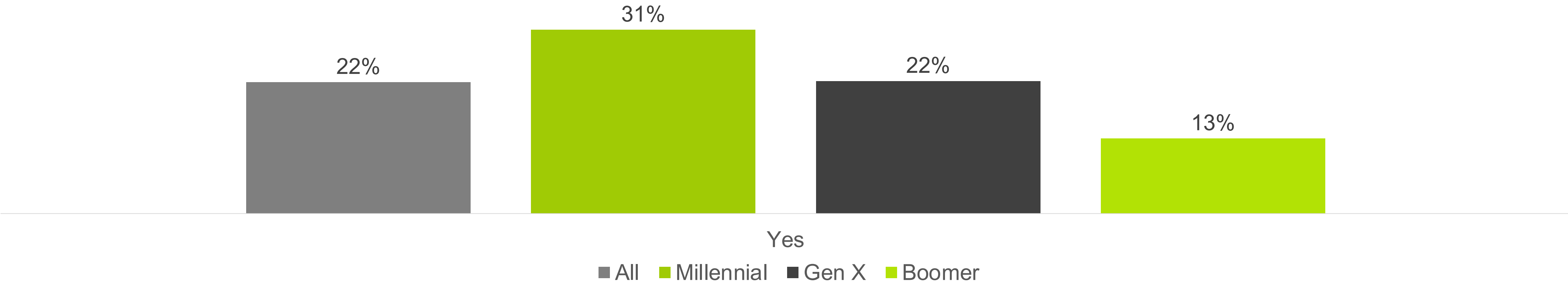
When travel will be safe



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

Given the uncertainty of when it will be safe to travel, it's not surprising that only 22% have their plans booked for 2021.

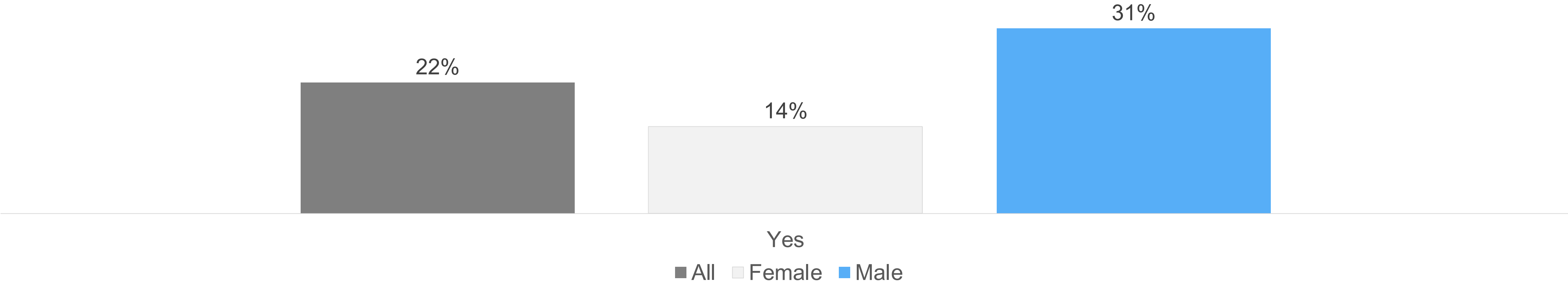
Have travel plans for 2021



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

Men (31%) are more than twice as likely as women (14%) to have booked 2021 travel.

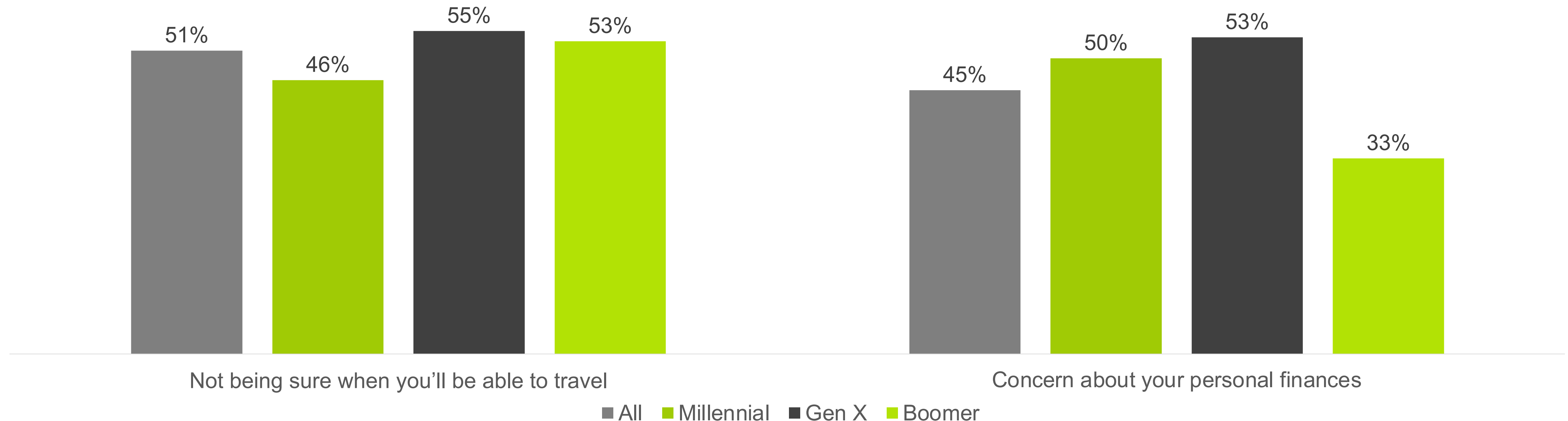
Have travel plans for 2021



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

Uncertainty about the safety of travel (51%) is not the only thing interfering with bookings. Nearly half of the sample (45%) have concerns about their finances.

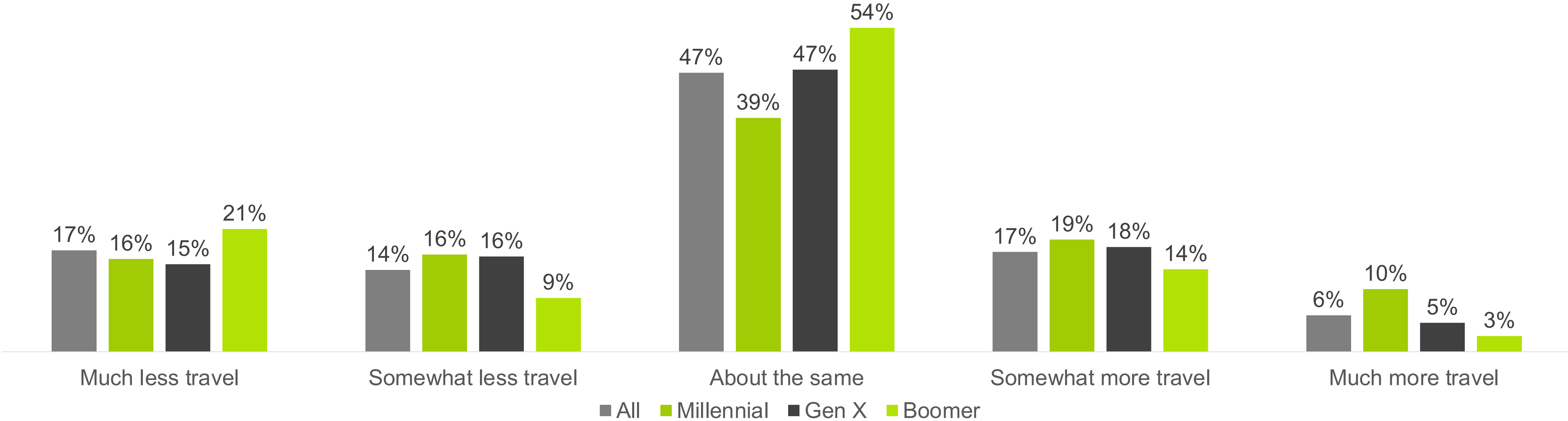
Influence on decision to not travel in 2021: top 2 box



How influential have the following been on your decision to not make travel plans for 2021?

Anticipated 2021 2nd half travel, which looked very similar to actual second half travel in 2019 in a prior study, now appears somewhat lower.

Travel second half 2021 vs second half 2019



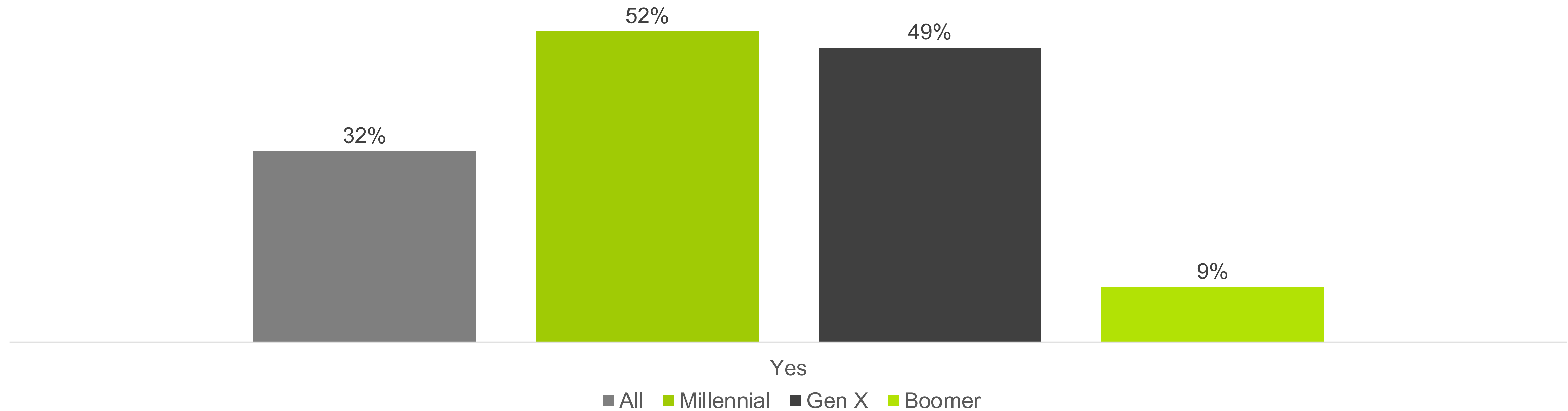
How will your personal travel in the second half of 2021 compare to the travel you did in the second half of 2019 before COVID?



Home Improvement – Social Media

Among homeowners, 32% follow 1 or more home improvement brands on social media.

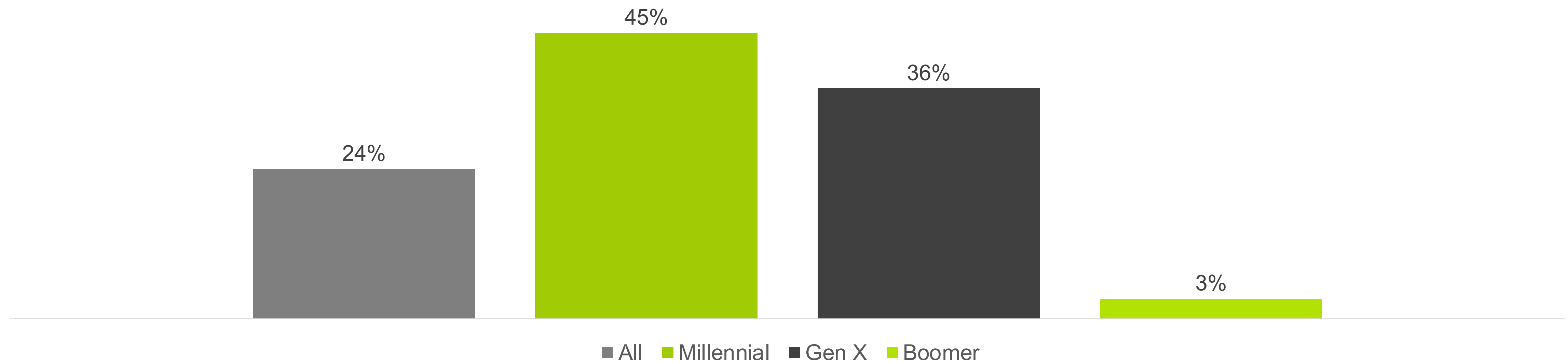
Follow home improvement brands on social media



Do you follow any home improvement (tools and materials) on social media?

Nearly 1 person in 4 believes it's important for home improvement brands to have a social media presence. The overall number would be quite a bit higher were it not for Boomers.

Importance of home improvement brands presence on social media: top 2 box

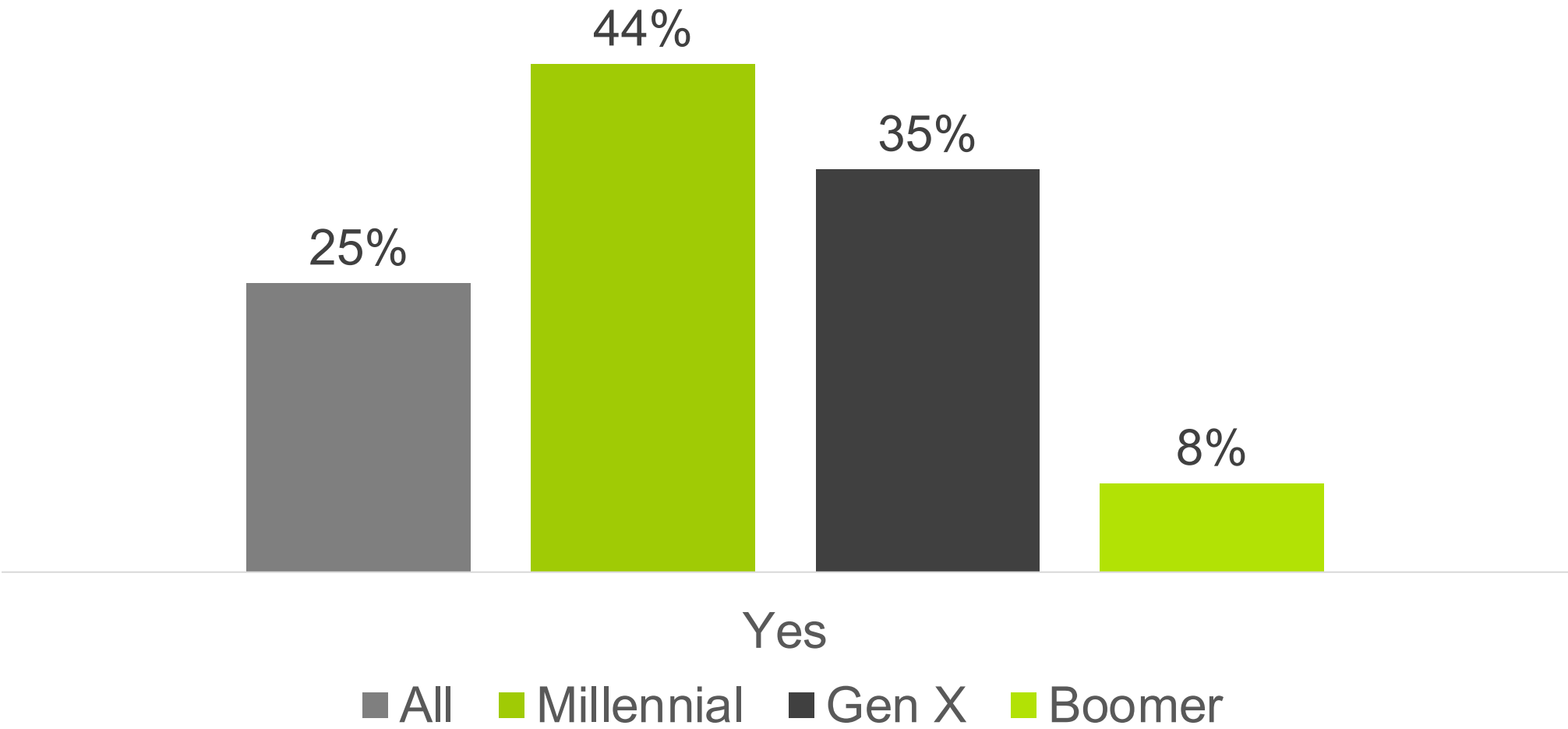


How important is it to you that home improvement brands are on social media?



When considering a purchase from a new home improvement brand, 25% check to see if the brand has a social media presence. Again, the generational bias is extreme.

Check for home improvement brands on social media

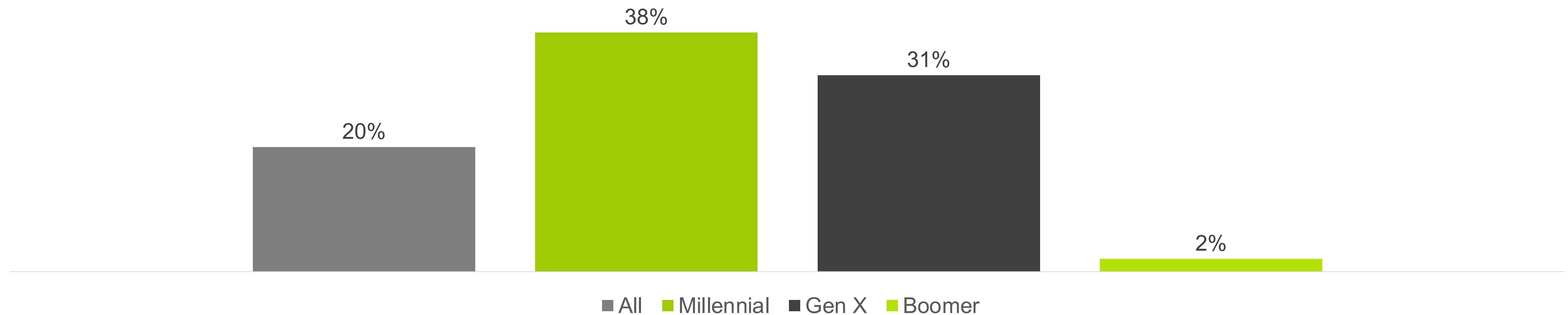


Before purchasing tools or materials from a new brand, do you check to make sure the brand is on social media?



1 in 5 respondents say social media frequently influences their home improvement purchases. However, the influence on Boomer purchases is almost nil.

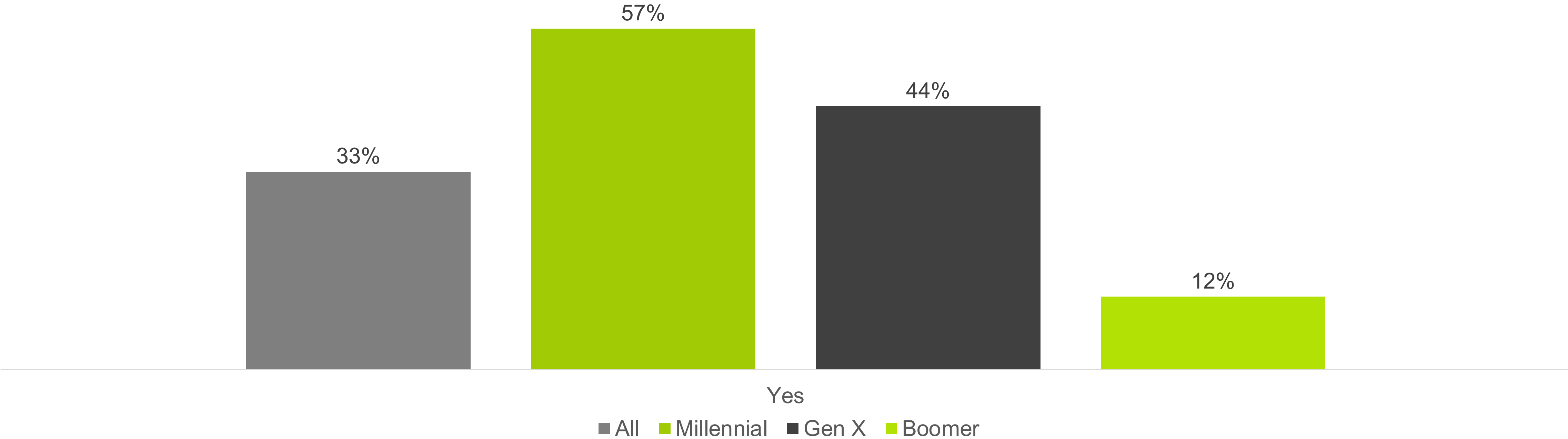
Social media influence on home improvement purchase: top 2 box



How often does social media influence you to make a home improvement purchase?

33% of respondents use social media to solicit opinions about home improvement brands they're considering.

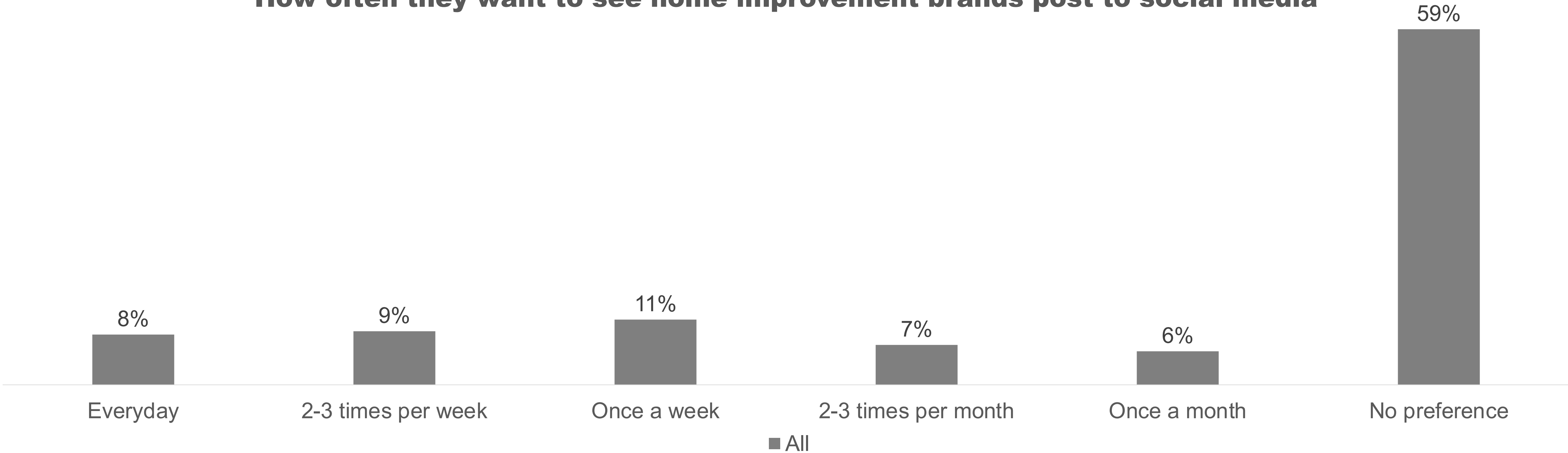
Check opinions on social media for home improvement products considered



Have you ever checked on social media to get other people's opinion about a home improvement brand you were considering buying?

Less than half of the respondents (41%) have any opinion on the frequency with which a brand should post to social media.

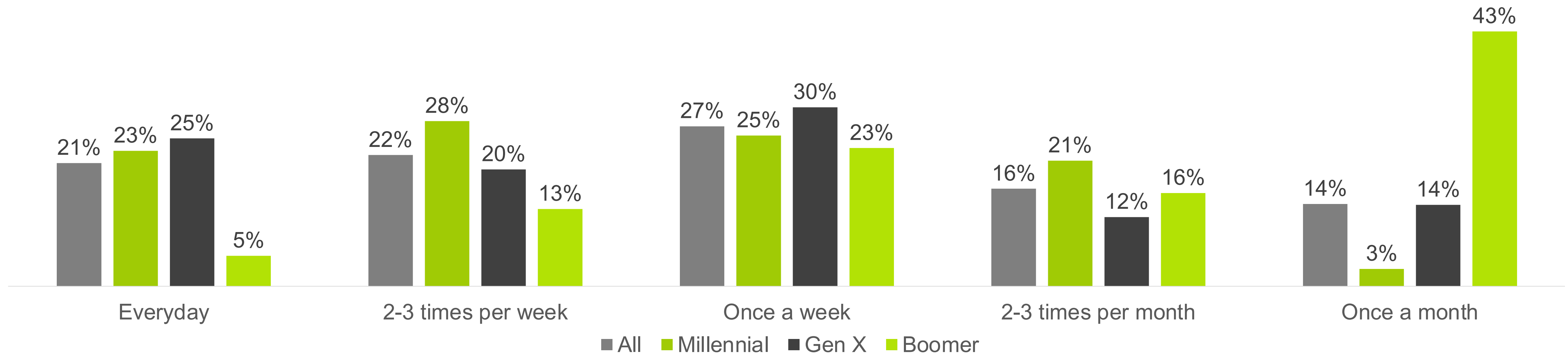
How often they want to see home improvement brands post to social media



How often do you want home improvement brands to post in social media?

Among those who do have an opinion on the frequency of posts, nearly half of Millennials and Gen X'ers think posts should occur twice a week or more. 43% of Boomers think monthly is sufficient.

How often they want to see home improvement brands post to social media



How often do you want home improvement brands to post in social media?



COVID-19
VACCINATION
CENTER
↑

NO APPT'S
WALK UP'S

COVID-19 Vaccinations

GLOUCESTER COUNTY
COVID-19 VACCINE SITE
RCSJ COLLEGE CENTER
→

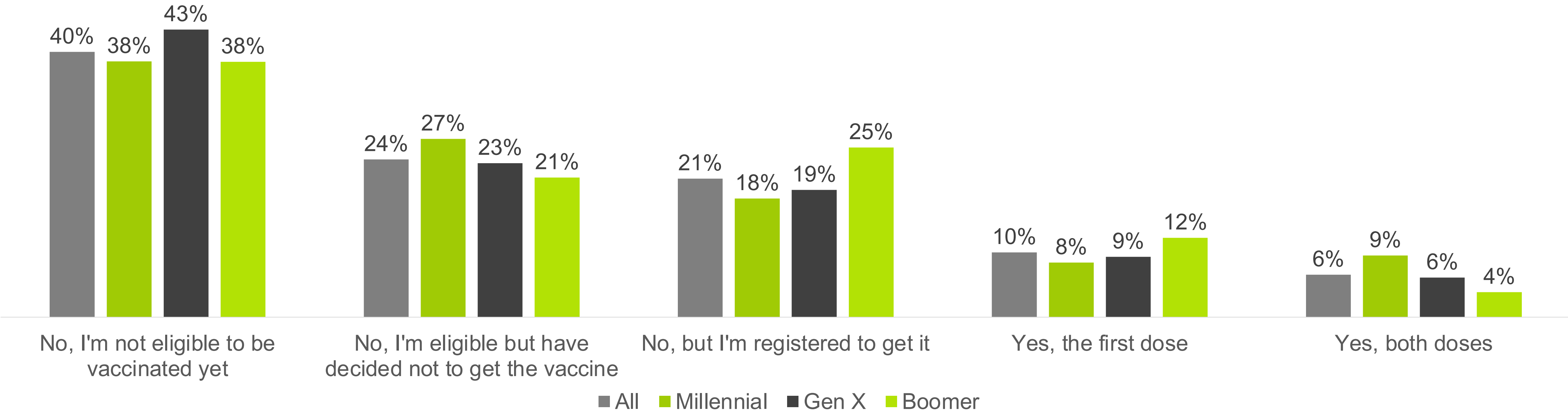
Rowan Medicine | Rowan University
Hennepin | ...

GLOUCESTER COUNTY
COVID-19 VACCINE SITE
PARKING
←



6% of respondents have received both doses of the COVID vaccine and 10% have received just the first dose.

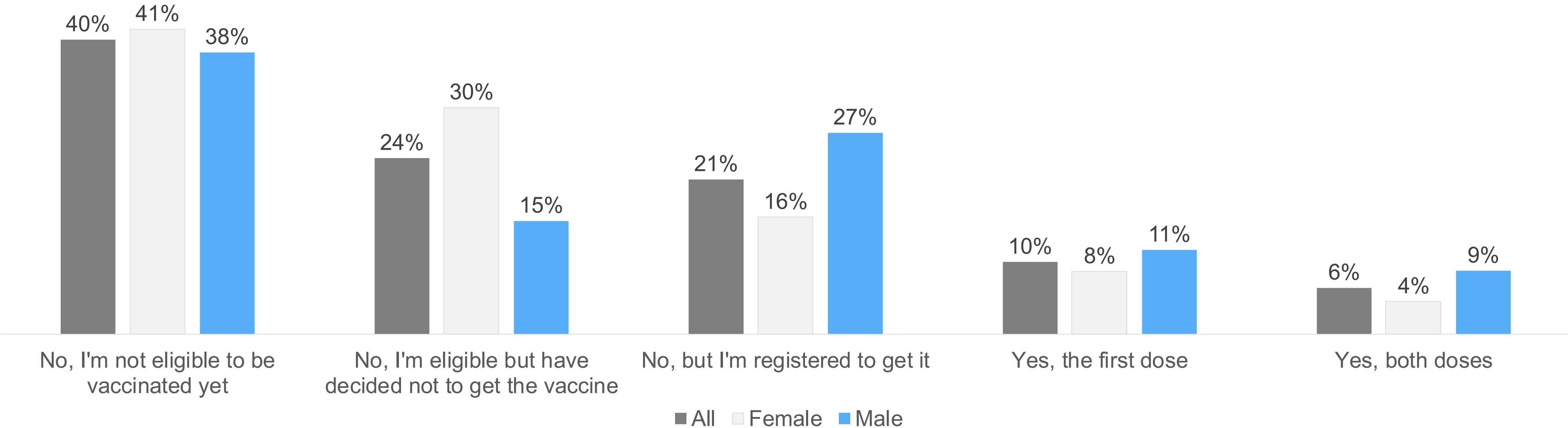
COVID Vaccine Status



Have you received the COVID-19 vaccine yet?

Women (30%) are twice as likely as men (15%) to say they're eligible for the vaccine but have decided not to get it yet.

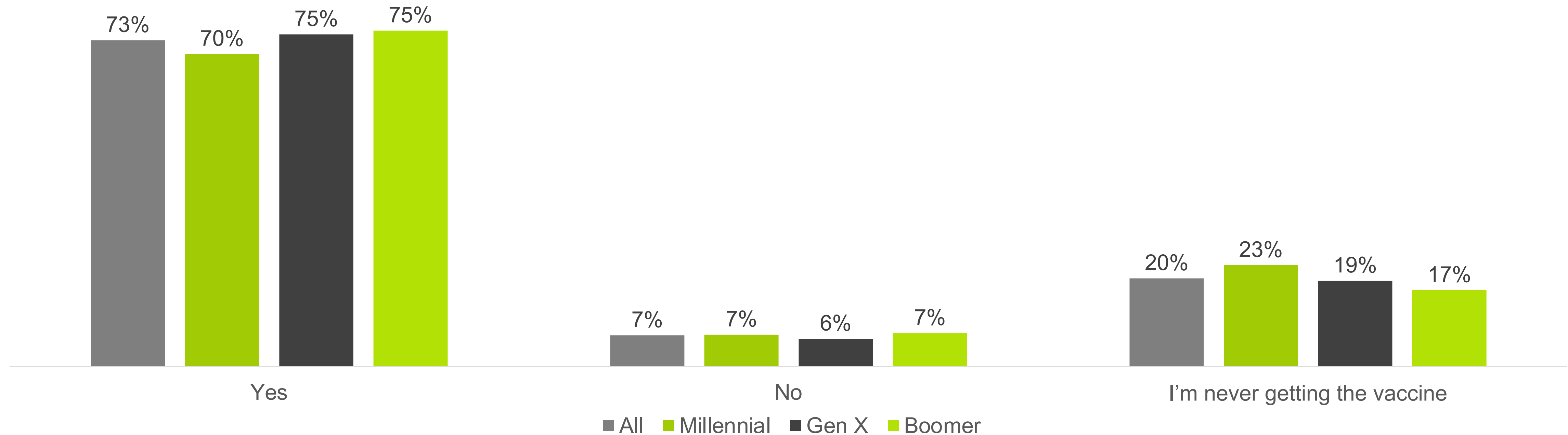
COVID Vaccine Status



Have you received the COVID-19 vaccine yet?

Of the 80% likely to ultimately get the vaccine, 91% appreciate the need to maintain safety protocols. 20% of respondents remain adamant about not 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

2021 Travel

- More than half of the respondents (54%) have canceled personal travel plans because of COVID-19.
 - Not surprisingly, a similar number (55%) are excited or very excited to begin traveling again.
- Nearly one-third (32%) of respondents have travel credits or money that they have specifically earmarked for travel.
- While nearly 1 person in 5 (17%) feels it is safe to travel now, 53% percent think safe travel won't be available until after July 1.
- Given the uncertainty of when it will be safe to travel, it's not surprising that only 22% have their plans booked for 2021.
 - Men (31%) are more than twice as likely as women (14%) to have booked 2021 travel.
- Uncertainty about travel safety (51%) is not the only thing interfering with bookings. Nearly half of the sample (45%) have concerns about their finances.
- Anticipated 2021 2nd half travel, which looked very similar to actual second half travel in 2019 in a prior study, now appears somewhat lower.



Home Improvement – Social Media

- Among homeowners, 32% follow 1 or more home improvement brands on social media.
- Nearly 1 person in 4 believes it's important for home improvement brands to have a social media presence. The number would be quite a bit higher were it not for Boomers.
- When considering a purchase from a new home improvement brand, 25% of respondents check to see if the brand has a social media presence.
 - Again, the generational bias is extreme. Only 8% of Boomers check as opposed to 44% of Millennials.
- 1 in 5 respondents say social media frequently influences their home improvement purchases. However, the influence on Boomer purchases is almost nil.
- 33% of respondents use social media to solicit opinions about home improvement brands they're considering.

- Less than half of the respondents (41%) have any opinion on the frequency with which a brand should post to social media.
- Among those who do have an opinion on the frequency of posts, nearly half of Millennials and GenX'ers think posts should occur twice a week or more.
 - 43% of Boomers think monthly is sufficient.



Home Improvement – Social Media



COVID-19 Vaccinations

- 6% of respondents have received both doses of the COVID vaccine, and 10% have received just the first dose.
- Women (30%) are twice as likely as men (15%) to say they're eligible for the vaccine but have decided not to get it yet.
- Of the 80% likely to ultimately get the vaccine, 91% appreciate the need to maintain safety protocols.
 - 20% of respondents remain vehement about not ever getting the vaccine.



SALES

FACTORY