
Home Retail Consumer Monitor

Methodology

N = 660

MOE \pm 3.81%

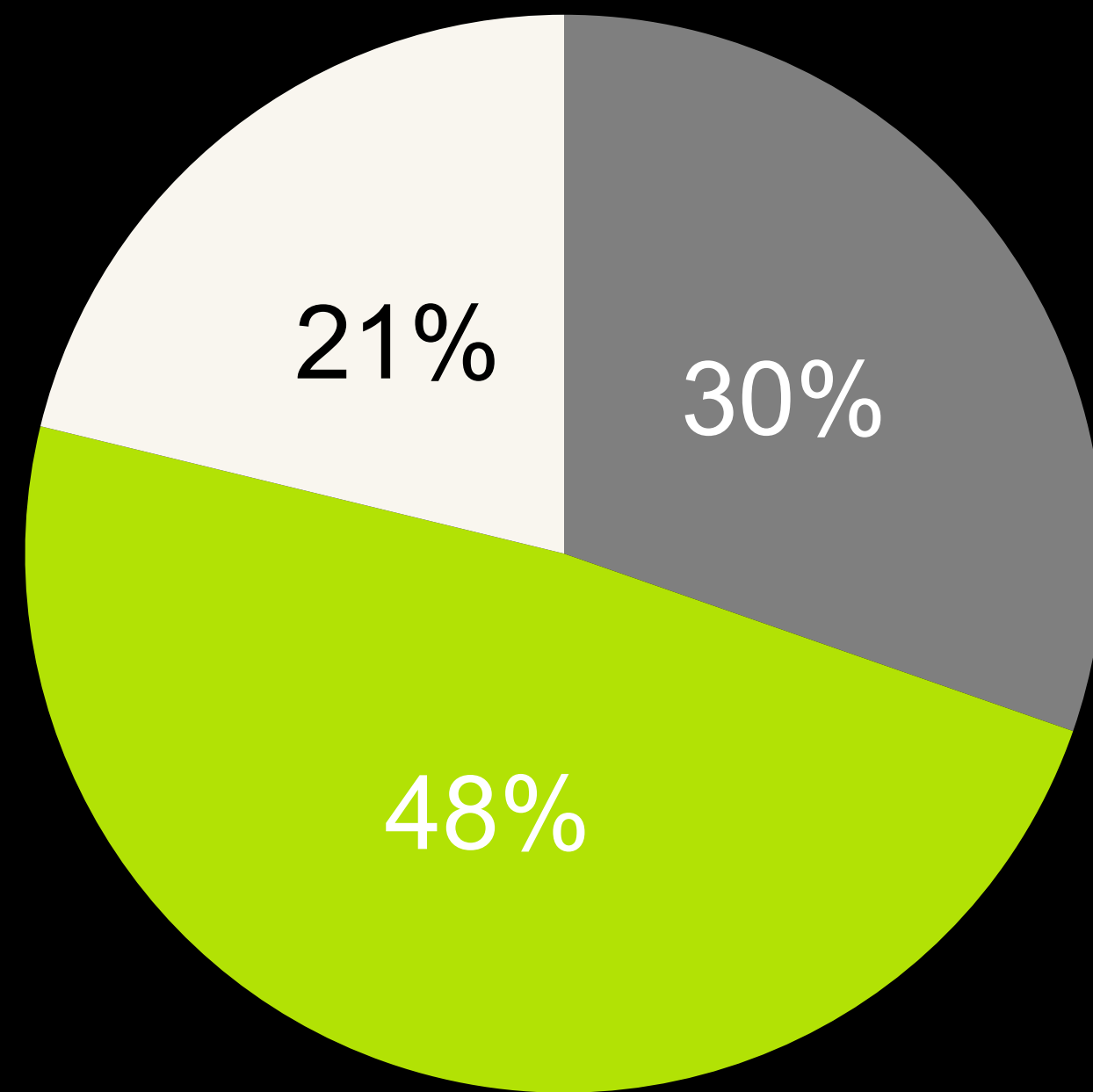
Panel: General Population

Collected: 4/30/21, 5/01/21

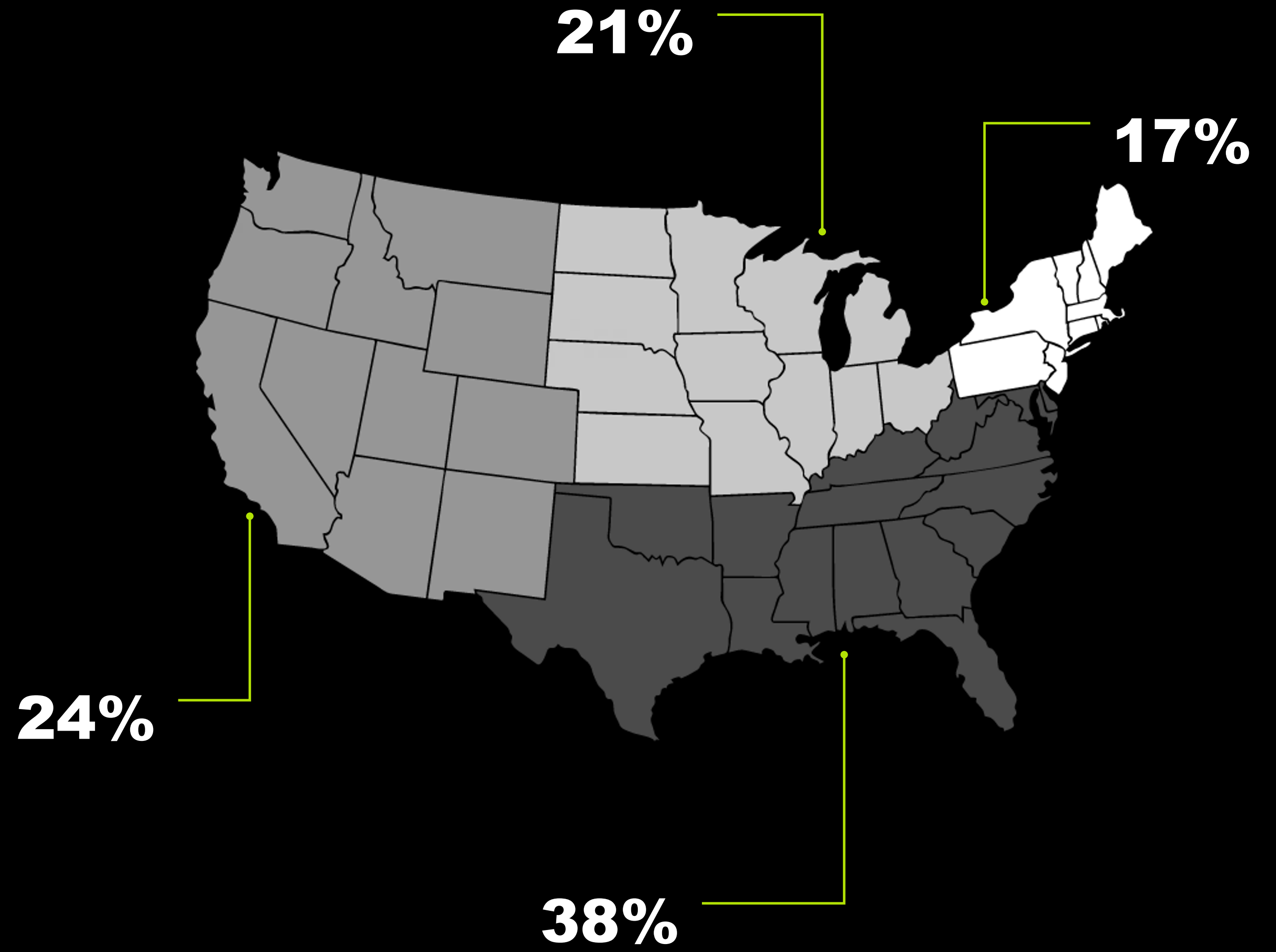


Panel Composition

Urbanicity

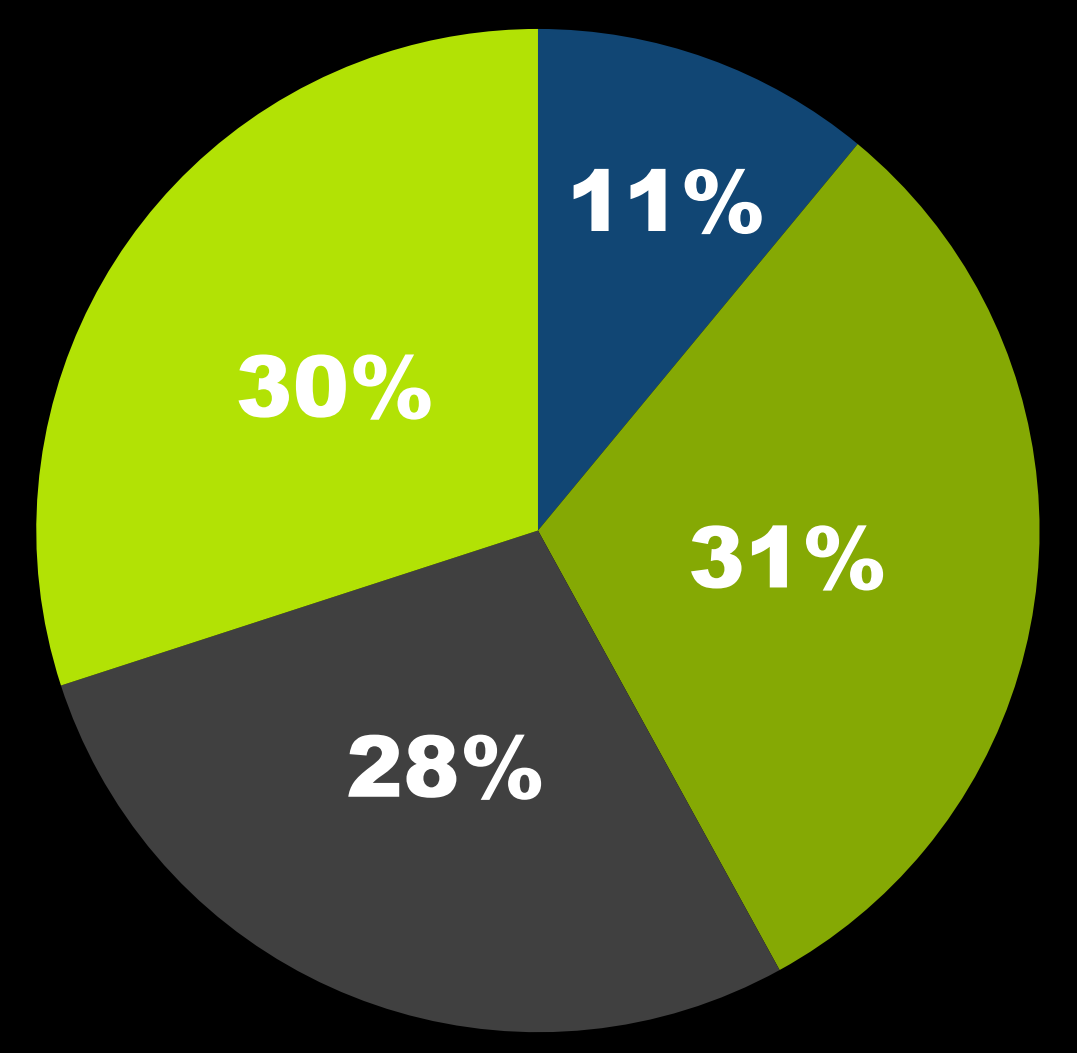


■ Urban ■ Suburban ■ Rural



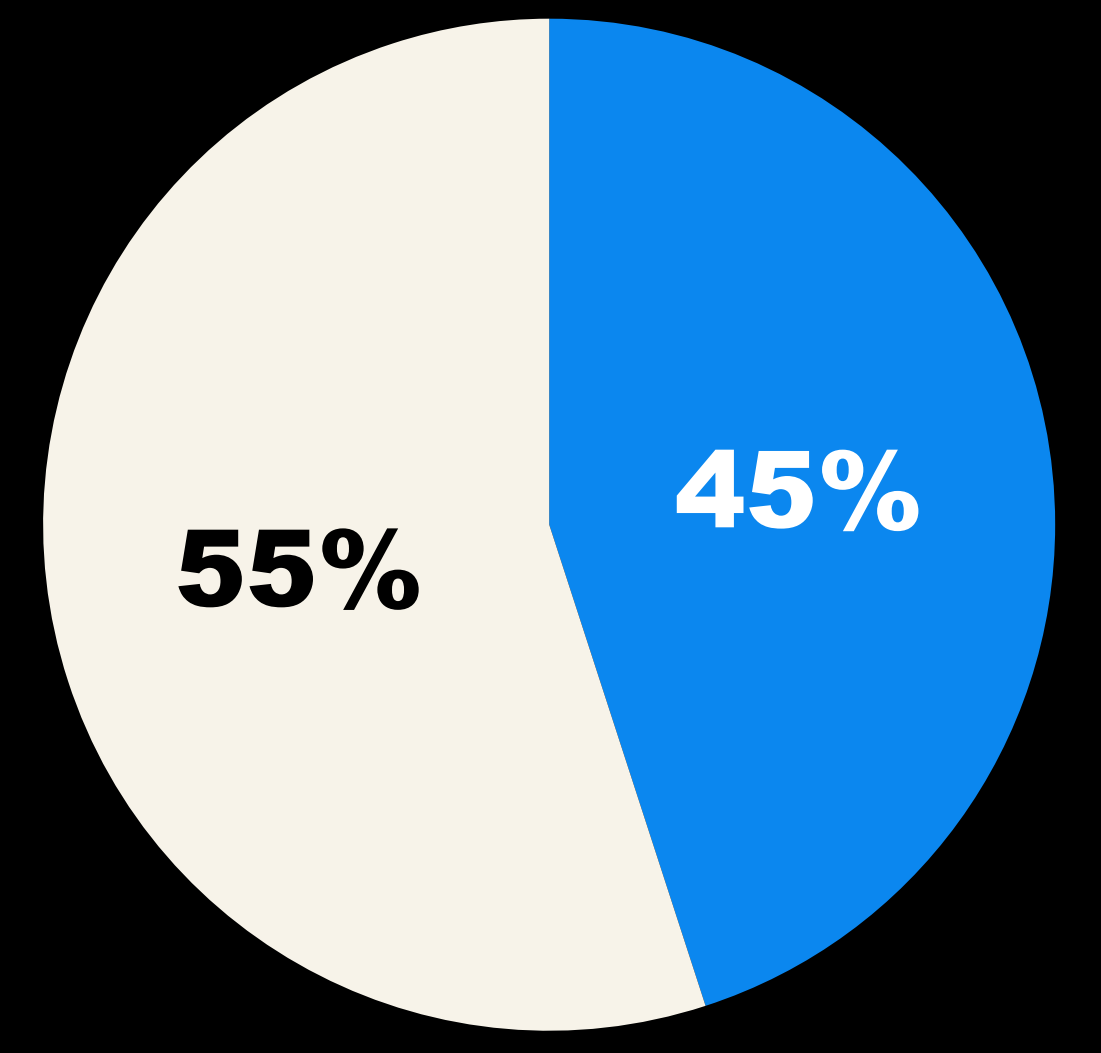


Generation



■ Gen Z ■ Millennial ■ Gen X ■ Boomer

Gender



■ Male ■ Female

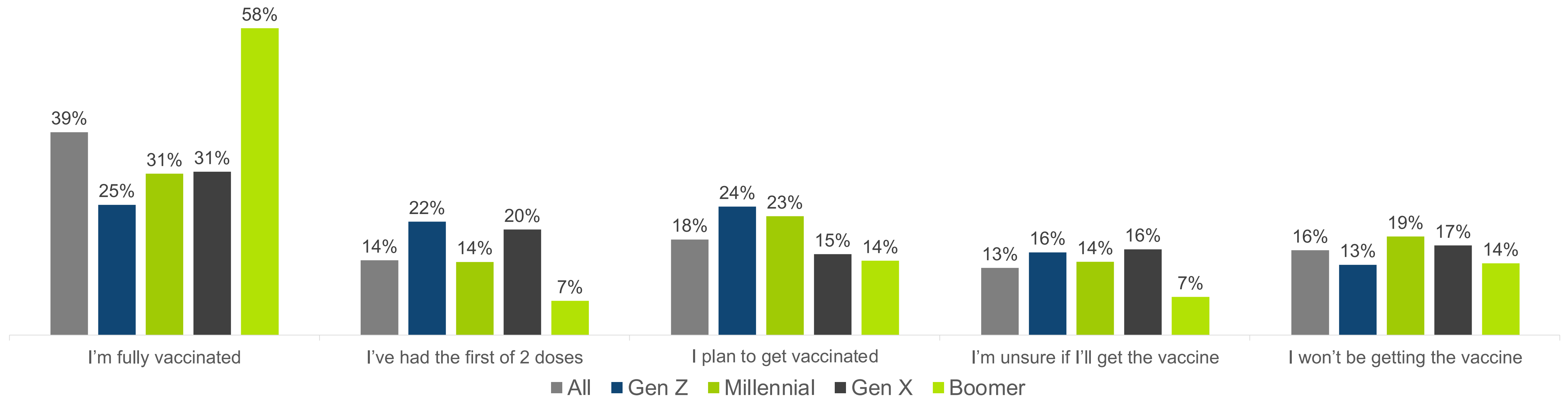


COVID-19



71% of respondents have gotten or are committed to getting the COVID vaccine. 13% are undecided and 16% have decided not to get vaccinated.

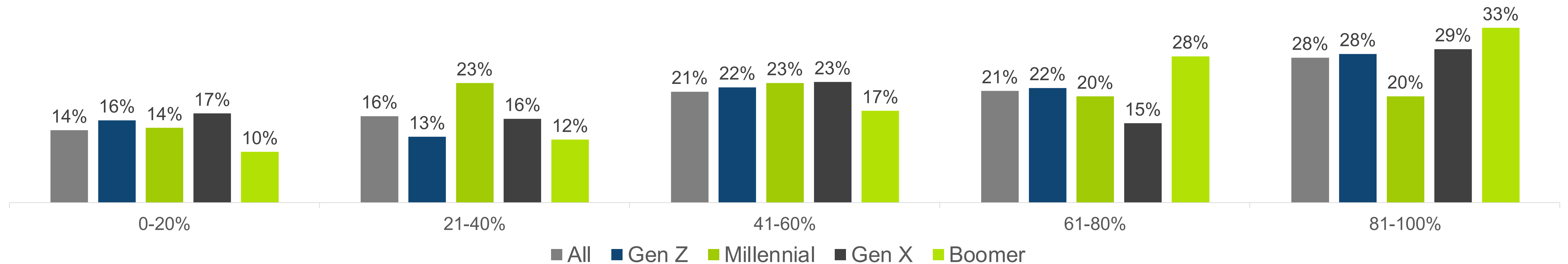
Position on COVID-19 vaccine



What is your current position on the COVID-19 vaccination?

Less than half of the respondents (49%) feel 60% or more of their family and friends will get vaccinated.

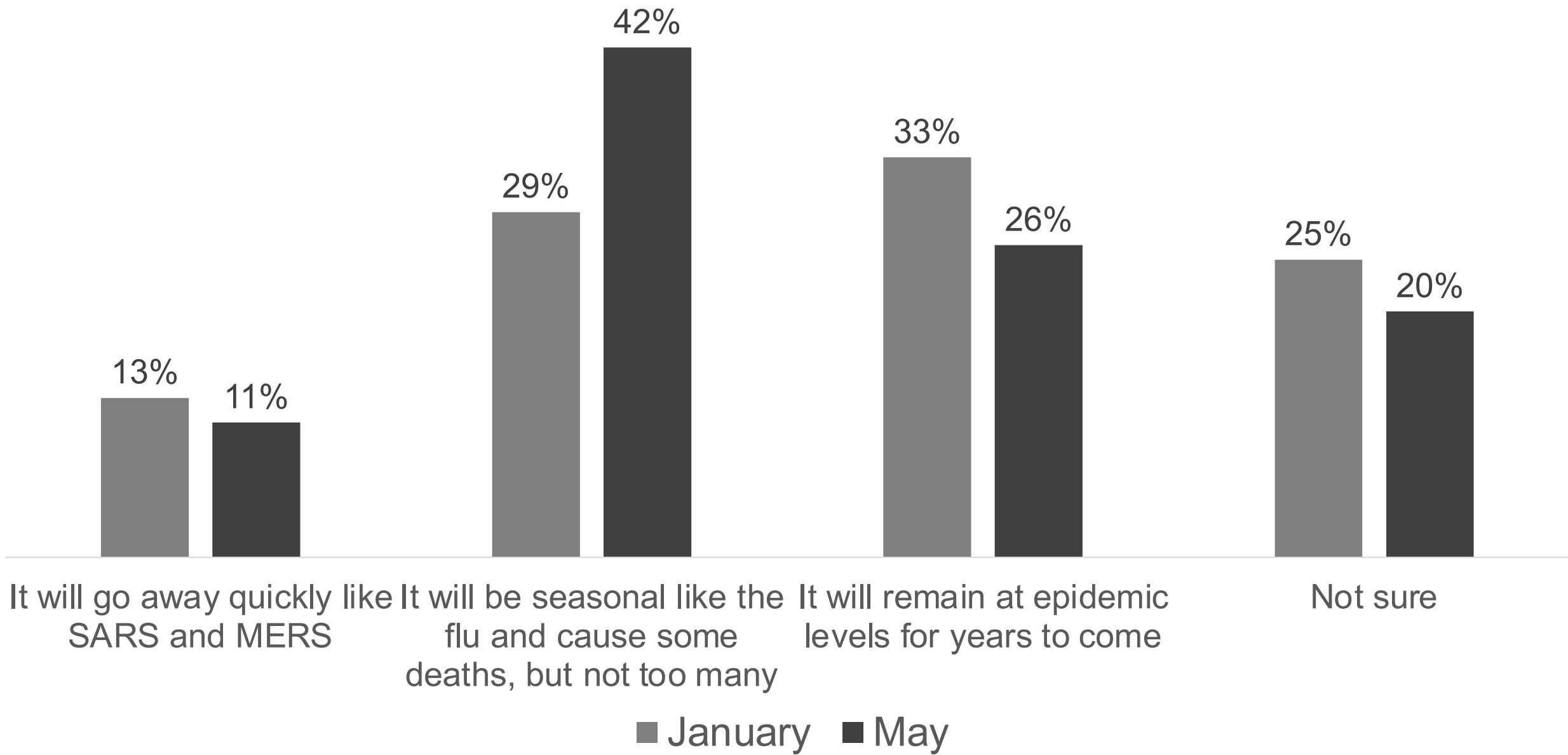
% Of family/friends who will get the vaccine



What % of your family and friends do you think will get the vaccine?

The presence and performance of the vaccines are beginning to be reflected in attitudes and behaviors. 42% now expect COVID to be like the flu, up from 29% in January.

Expected presence of COVID

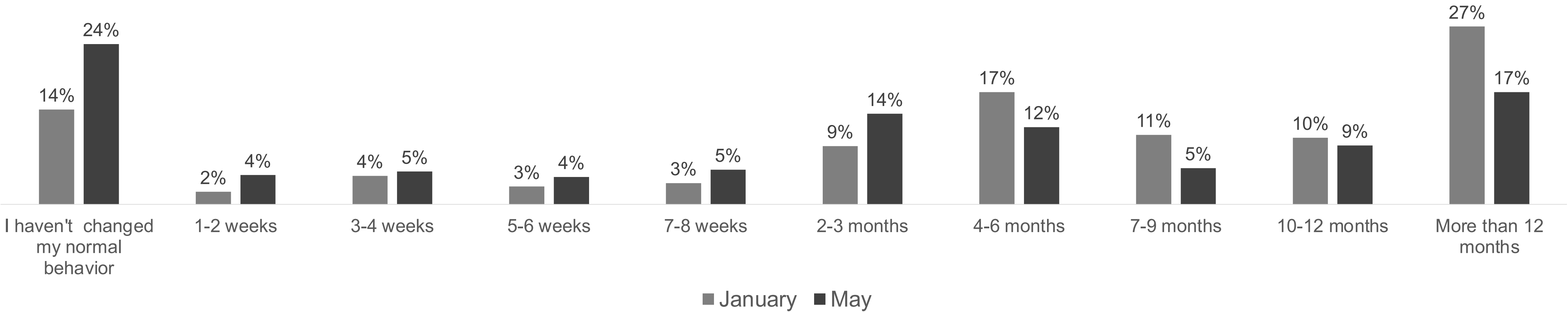


Which of the following best describes your expectation for the long-term presence of the Coronavirus?



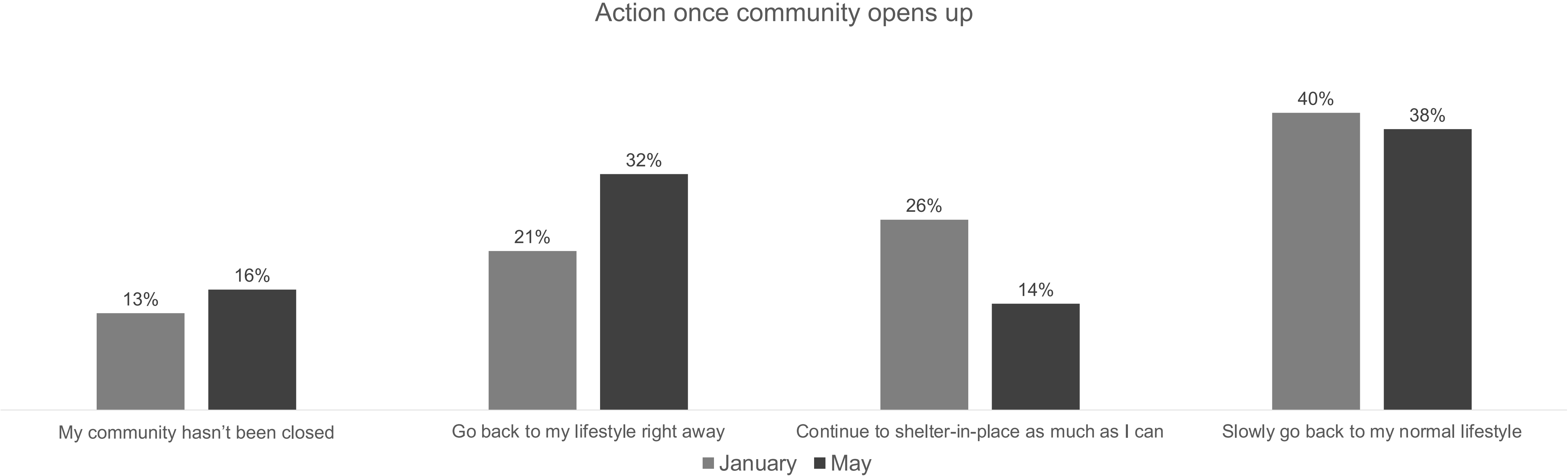
24% of respondents are back to their normal behaviors, up from 14% in January. Only 17% feel the opportunity to return to their routine is still more than 1 year away, which is down from 27%.

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.)?

The number of people who plan to continue sheltering in place after their community opens up has dropped nearly in half from 26% to 14%.



Which of the following best represents what you'll do as your community opens back up?

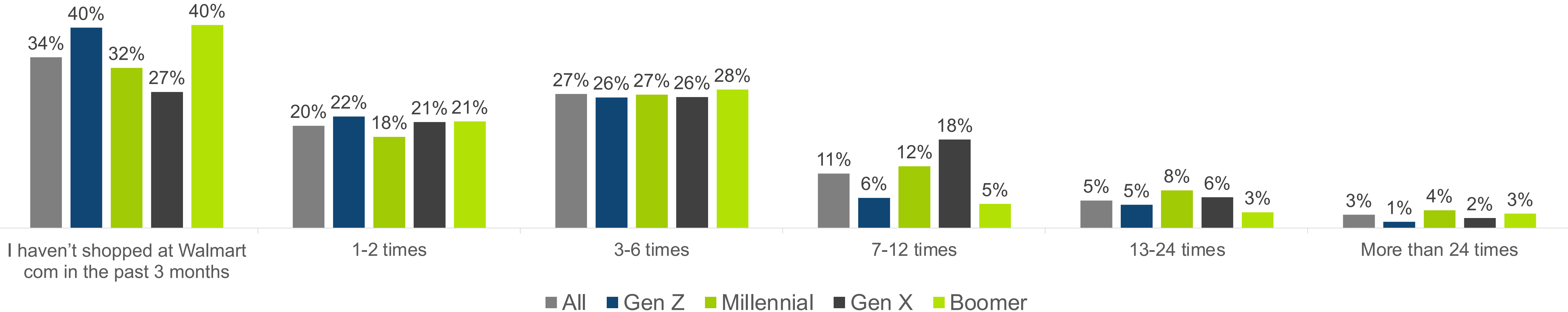


Walmart



Walmart has benefited during the pandemic, and it doesn't appear that will change as people begin their return to normalcy. 66% of respondents have shopped Walmart.com in the past 90 days.

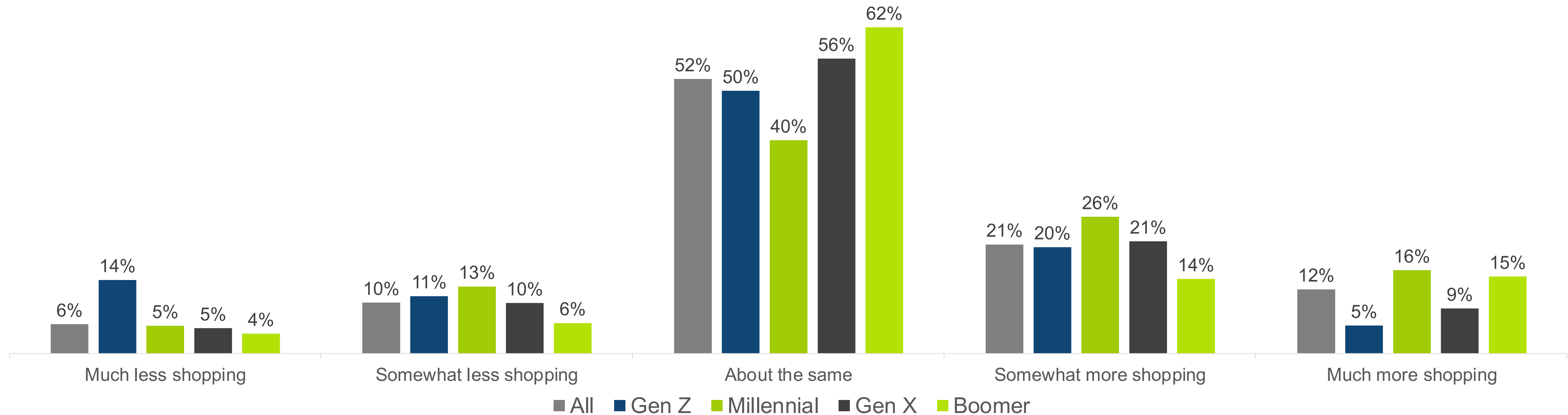
Times shopped Walmart.com in the last 3 months



How many times have you shopped at Walmart.com in the last 3 months?

One-third of those shopping on Walmart.com say their activity has increased in the past 90 days while only 16% say it has declined.

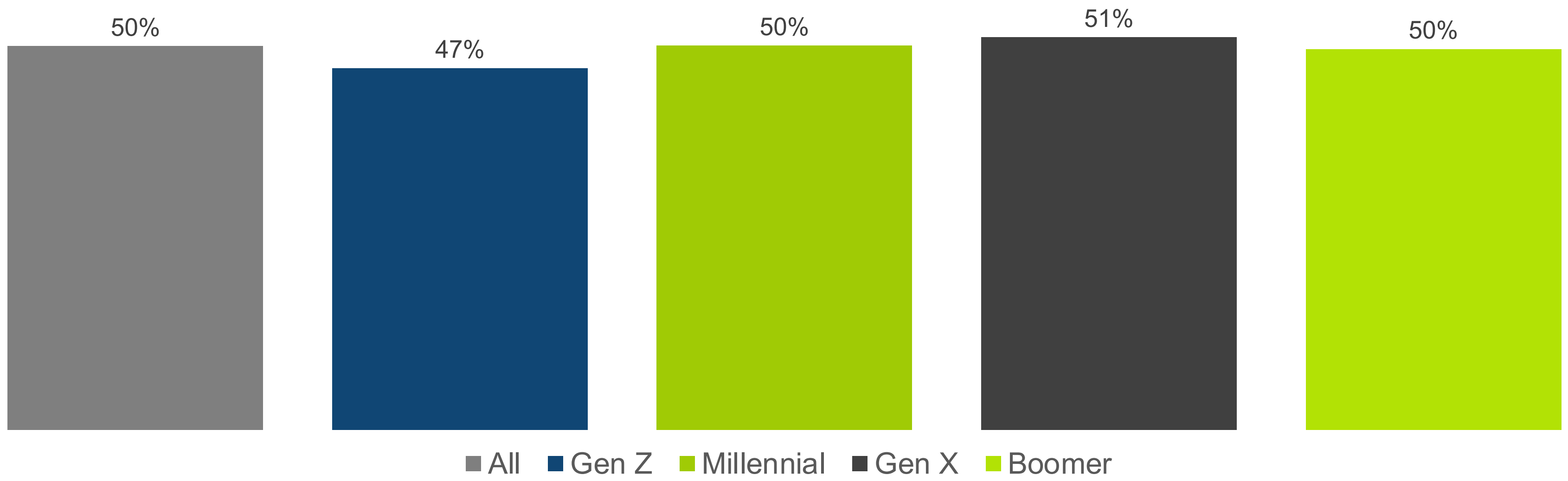
Change in Walmart.com shopping in the last 3 months



How has the amount of shopping you've done at Walmart.com changed in the past 3 months?

The shopping done at Walmart.com is split 50/50 between pick up at the store and home delivery.

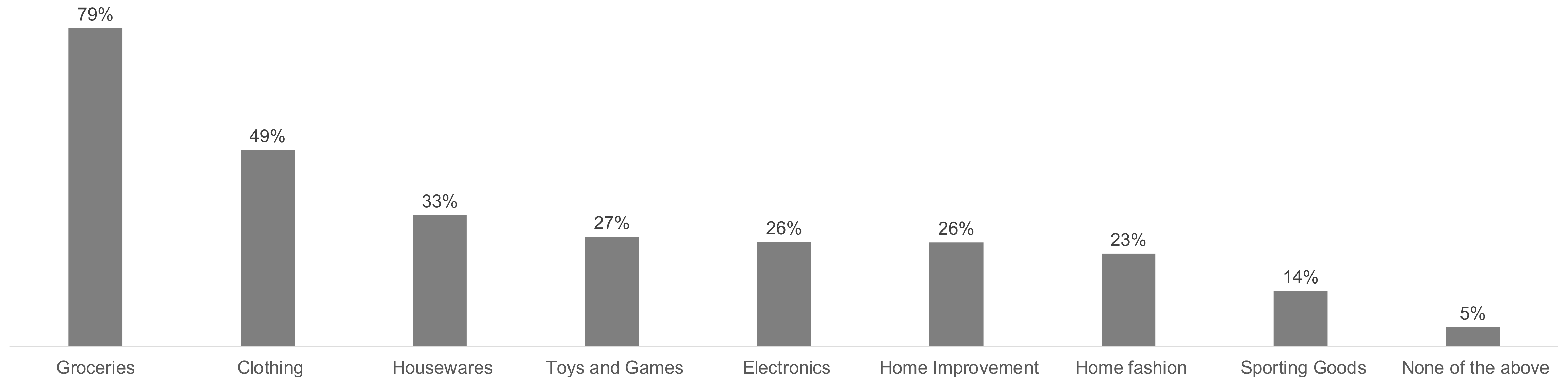
% of people shopping Walmart.com for home delivery



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%.

In the past 3 months the average respondent has made purchases in 2.77 of the categories tested.

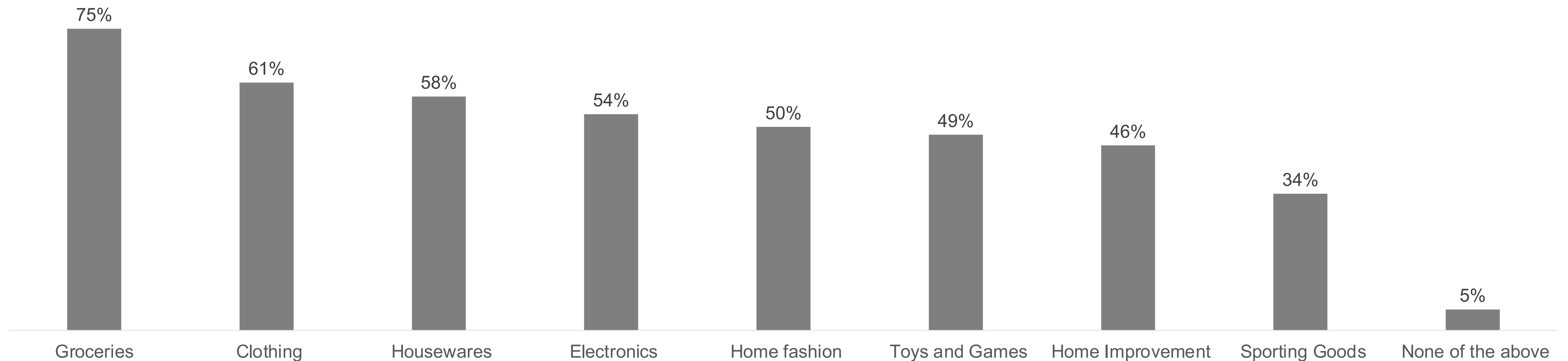
Categories Purchased at Walmart/Walmart.com in the last 3 Months:



In which of the following product categories have you made purchases from Walmart or Walmart.com in the past 3 months?

Future purchase consideration expands to 4.27 categories for the average respondent.

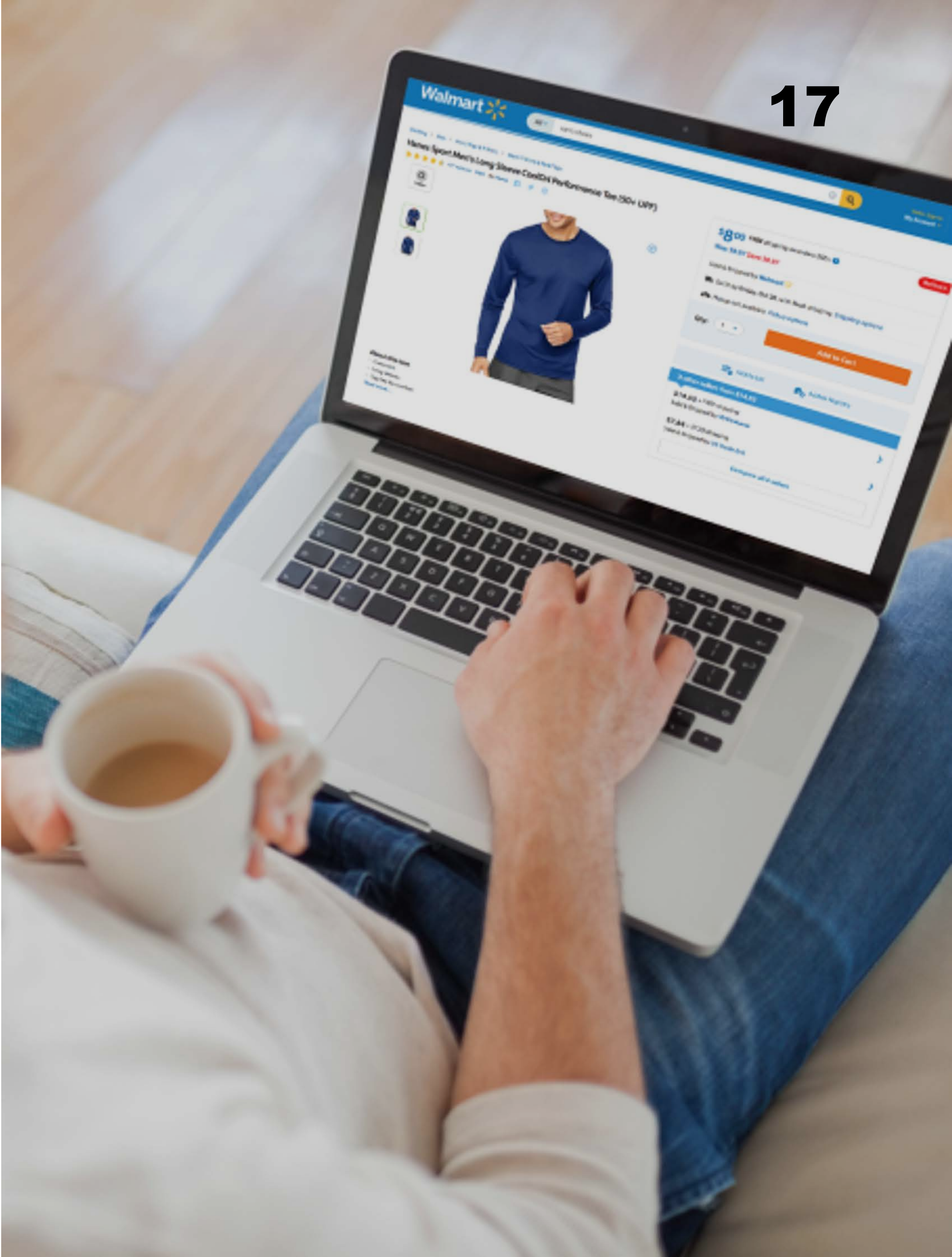
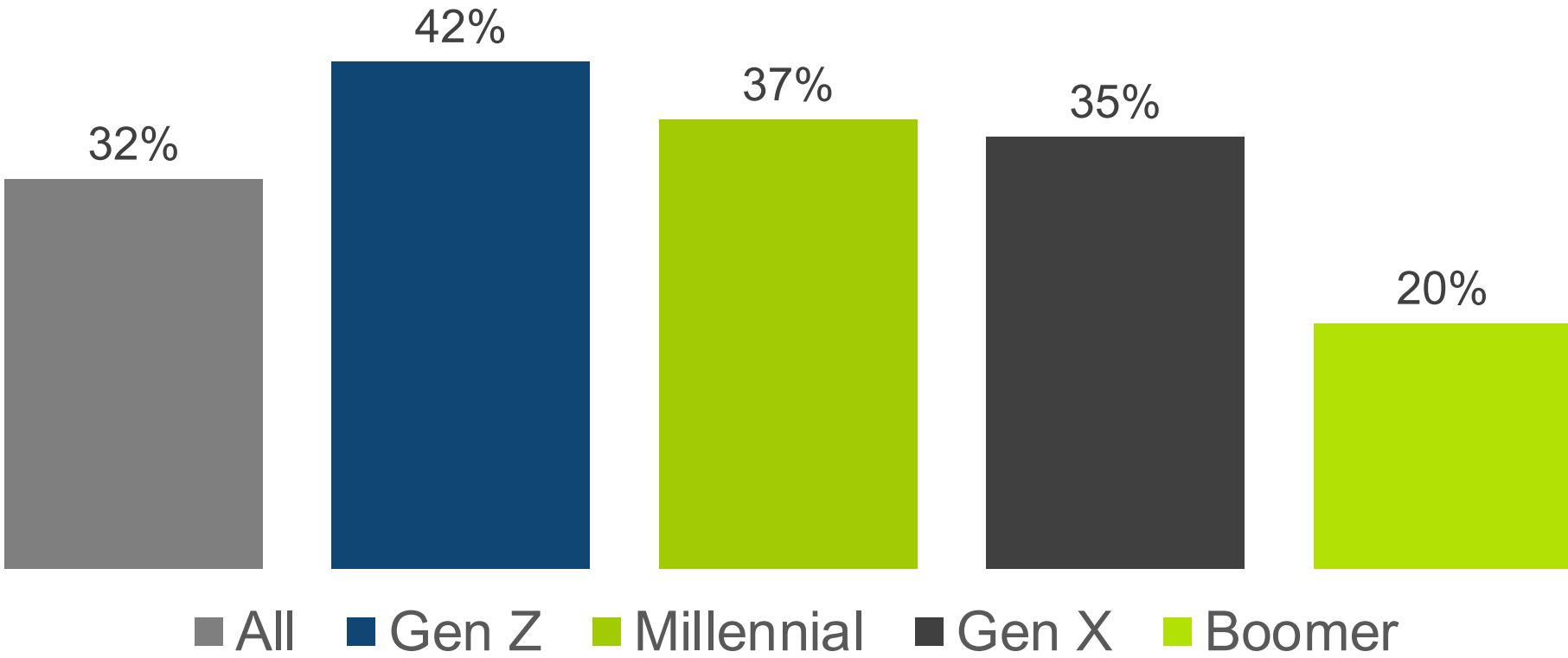
Categories Would Consider Purchasing at Walmart/Walmart.com in the Future



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

Nearly one-third of respondents (32%) will now consider purchasing product categories from Walmart that they wouldn't have considered pre-COVID.

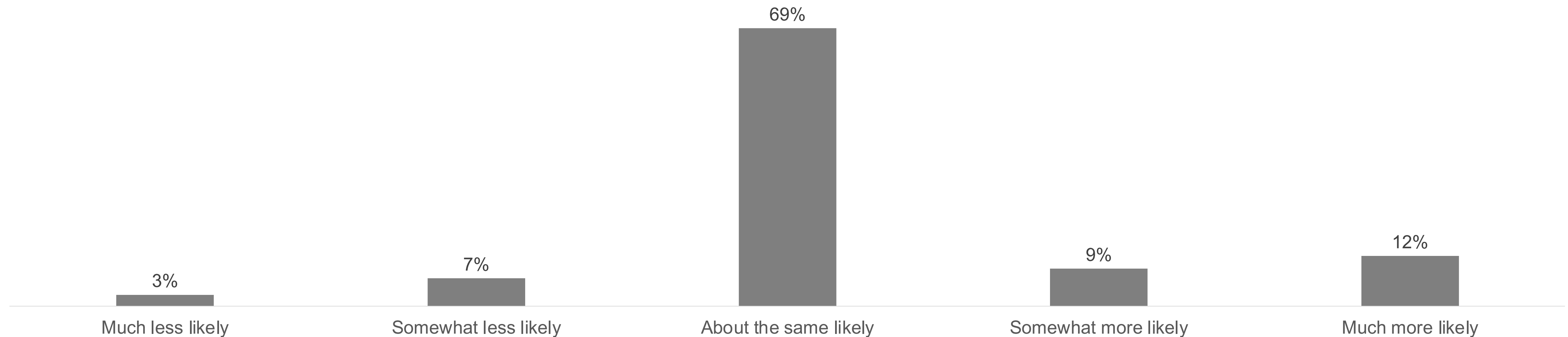
% Who would consider categories to purchase at Walmart/Walmart.com that would not have considered prior to COVID



Are there categories in which you would consider making purchases at a Walmart or Walmart.com in the future that you would not have considered before COVID-19?

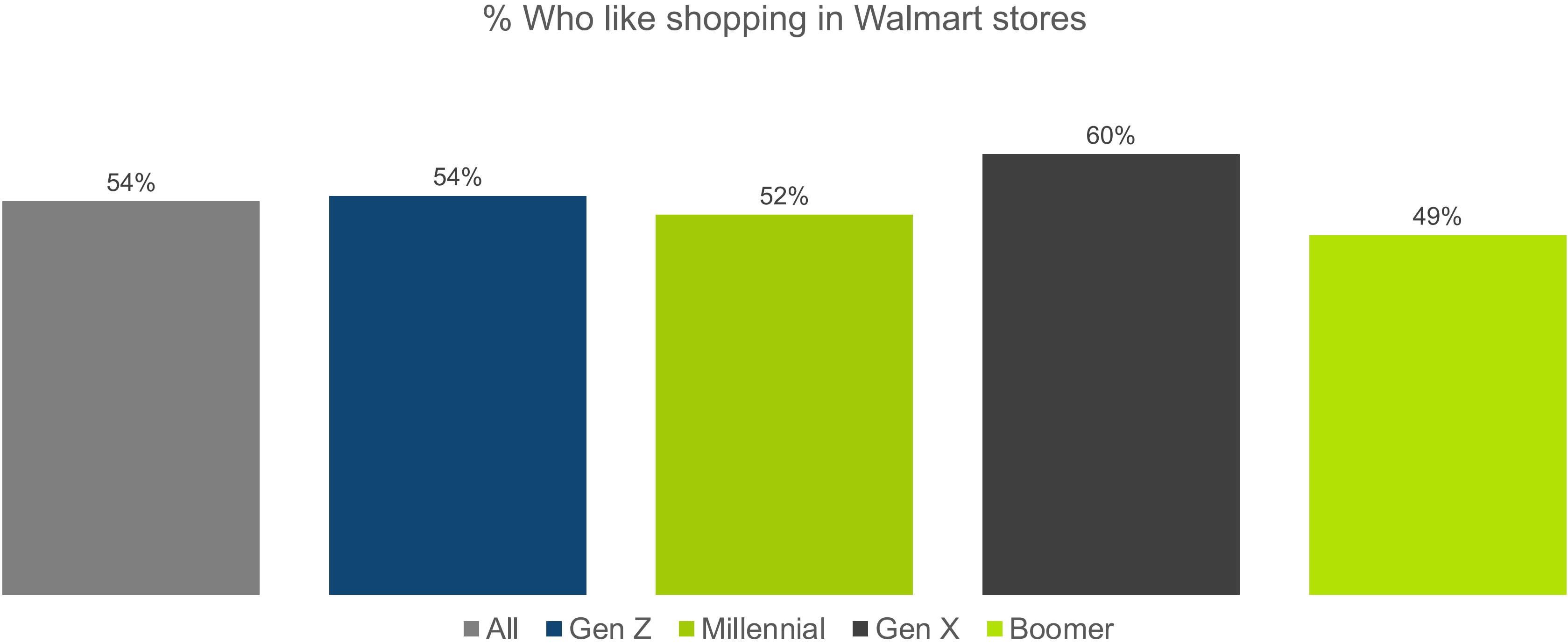
21% of respondents say they are more likely to do business with Walmart now than they were pre-COVID, while only 10% say they are less likely to do so.

More/less business conducted with Walmart now vs. before COVID



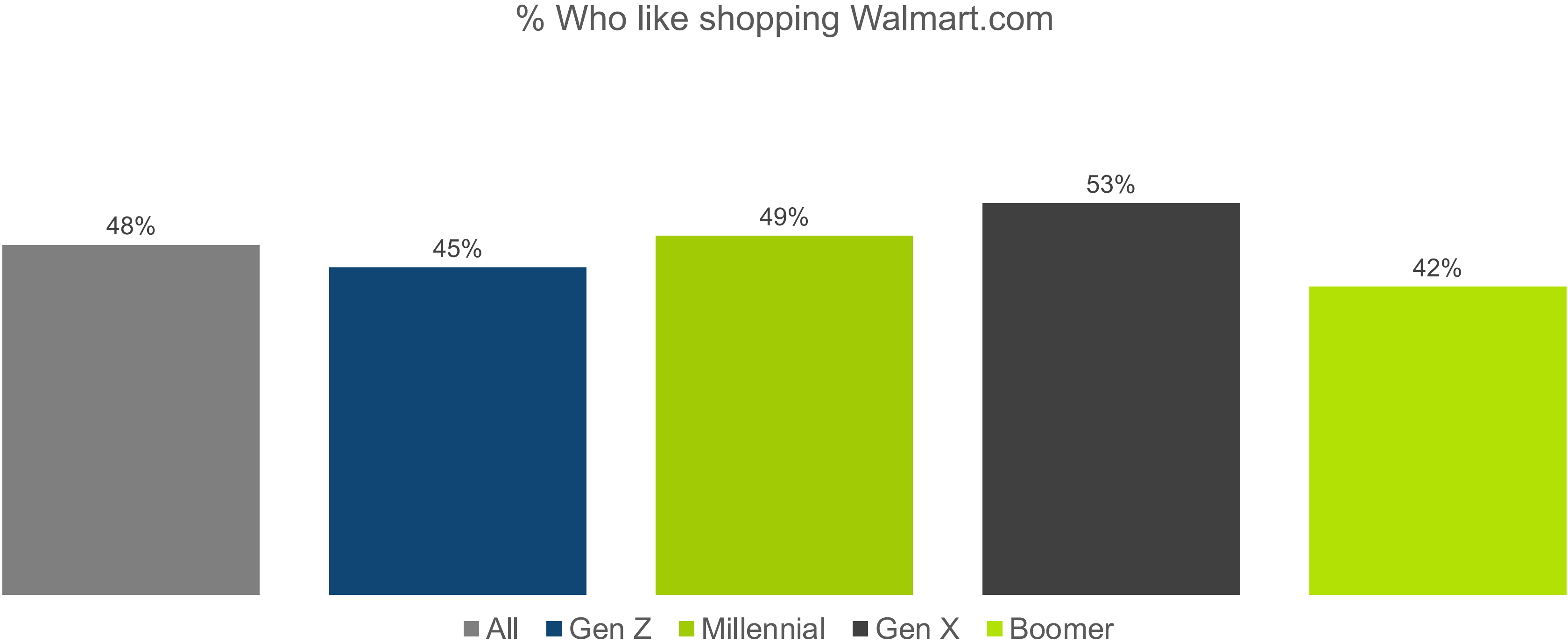
How much more or less likely are you to do business with Walmart now as compared to before COVID?

The increased appeal of Walmart does not mean that there aren't opportunities to improve the shopping experience. Only 54% of those shopping in Walmart stores like doing so.



Please indicate your level of agreement with the following.

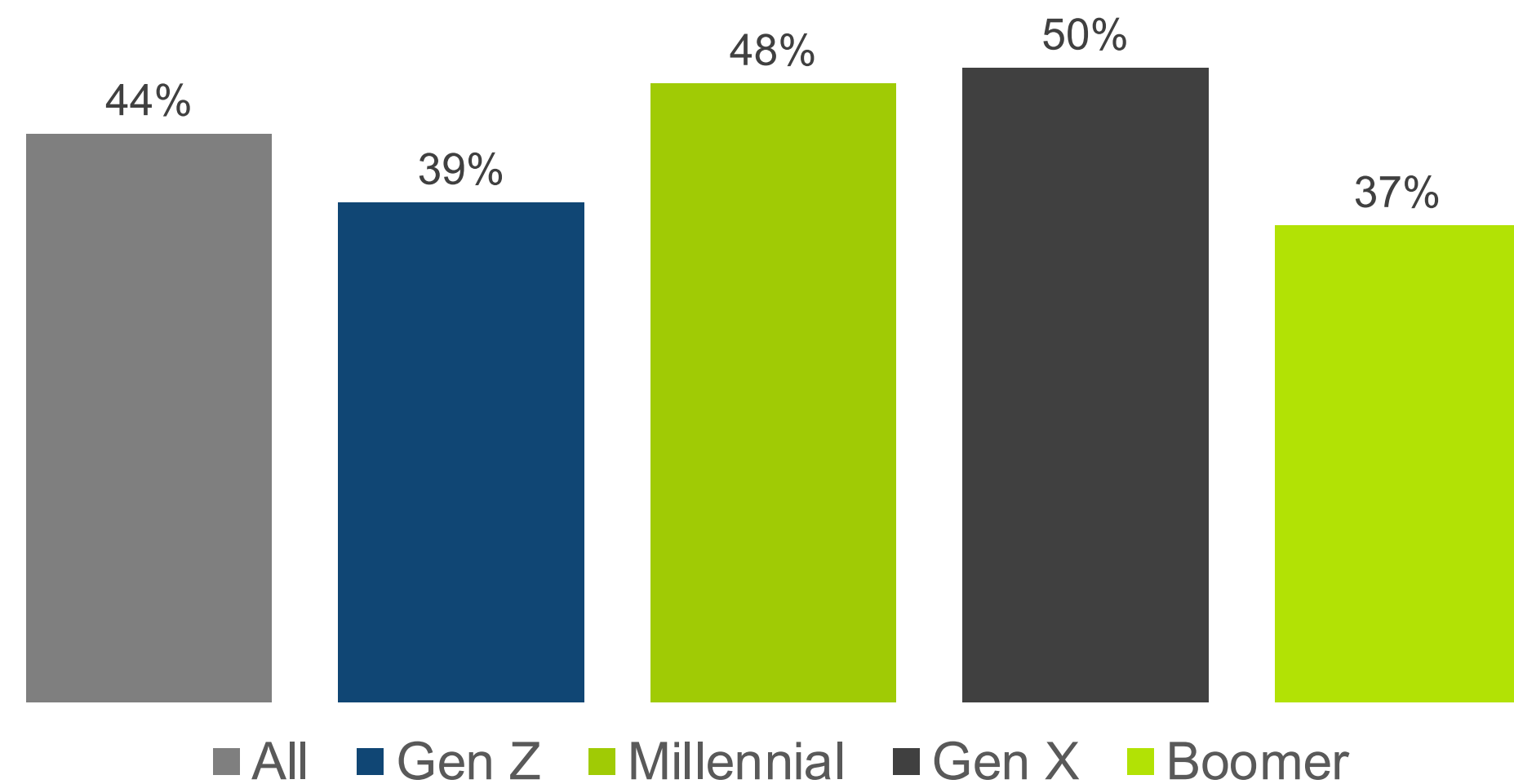
The same holds true for Walmart.com, where less than half (48%) of those shopping on the site enjoy the experience.



Please indicate your level of agreement with the following.

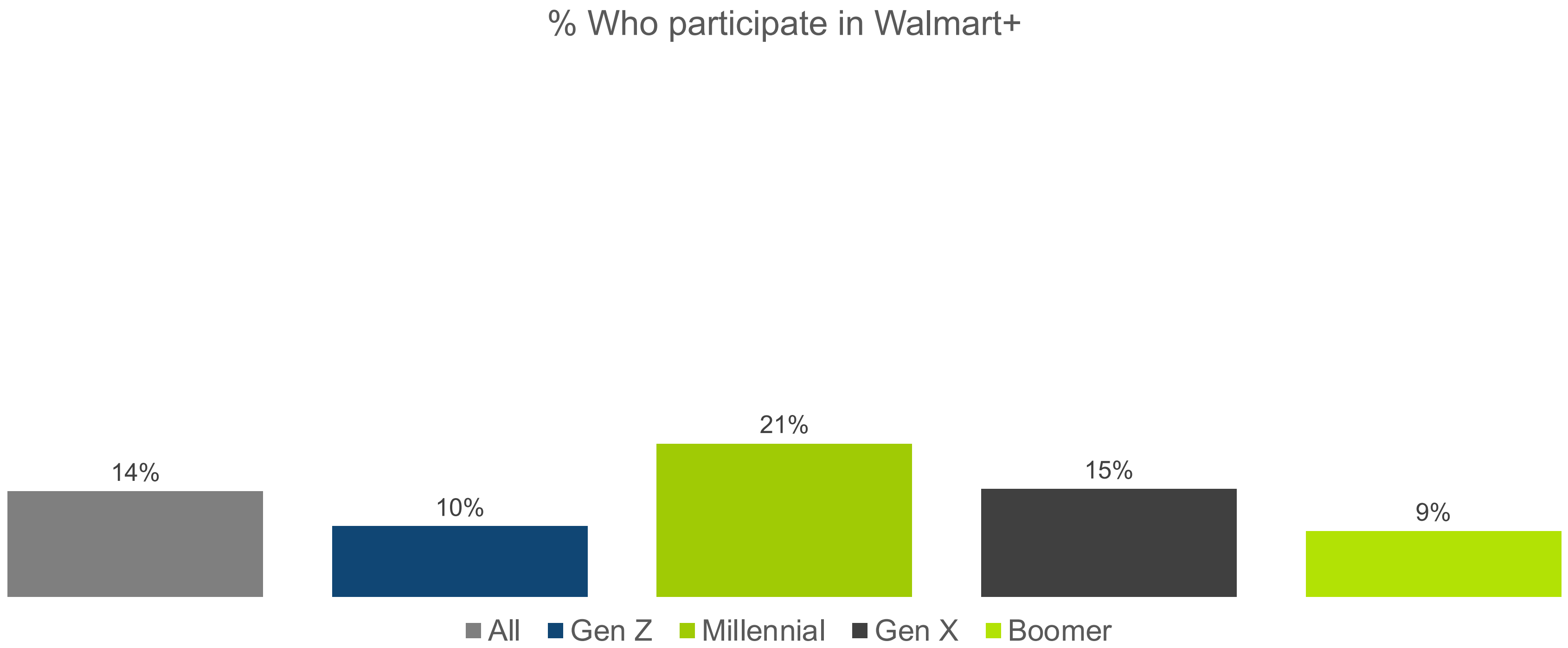
Despite Walmart's continued success, the Walmart+ program doesn't appear to be gaining much traction. Only 44% of respondents are aware of the program.

% Who are aware of Walmart+



Are you aware of the Walmart+ program?

And participation remains low. At 14%, it has not changed substantially in the past 90 days.



Are you participating in the Walmart+ program?

Summary

COVID-19

- 71% of respondents have gotten or are committed to getting the COVID vaccine.
 - 13% are undecided, and 16% have decided not to get vaccinated.
- Less than half of the respondents (49%) feel 60% or more of their family and friends will get vaccinated.
- The presence and performance of the vaccines are beginning to be reflected in attitudes and behaviors. 42% now expect COVID to be like the flu, which is up from 28% in January.
- 24% of respondents are back to their normal behaviors, which is up from 14% in January.
 - Only 17% feel the opportunity to return to their routine is still more than 1 year away, which is down from 27%.
- The number of people who plan to continue sheltering in place after their community opens up has dropped nearly half from 26% to 14%.

Summary

WALMART

- Walmart has benefited during the pandemic, and it doesn't appear that it will change as people begin to return to normal behaviors.
 - 66% of respondents have shopped Walmart.com in the past 90 days.
- One-third of those shopping on Walmart.com say their activity has increased in the past 90 days, while only 16% say it has declined.
- The business done at Walmart.com is split 50/50 between pick up at the store and home delivery.
- In the past 3 months, the average respondent has made purchases in 2.77 of the categories tested.
- Future purchase consideration expands to 4.27 categories for the average respondent.
- Nearly one-third of respondents (32%) will now consider purchasing product categories from Walmart that they wouldn't have considered pre-COVID.
- 21% of respondents say they are more likely to do business with Walmart now than they were pre-COVID, while only 10% say they are less likely to do so.

Summary

WALMART – con't

- The increased appeal of Walmart does not mean that there aren't opportunities to improve the shopping experience. Only 54% of those shopping in Walmart stores like doing so.
- The same holds true for Walmart.com where less than half (48%) of those shopping on the site enjoy the experience.
- Despite Walmart's continued success, the Walmart+ program doesn't appear to be gaining much traction.
 - Only 44% of respondents are aware of the program.
- And, participation remains low. At 14%, it has not changed substantially in the past 90 days.