



Home Retail Consumer Monitor

Presented October 5, 2021

Methodology

N = 826

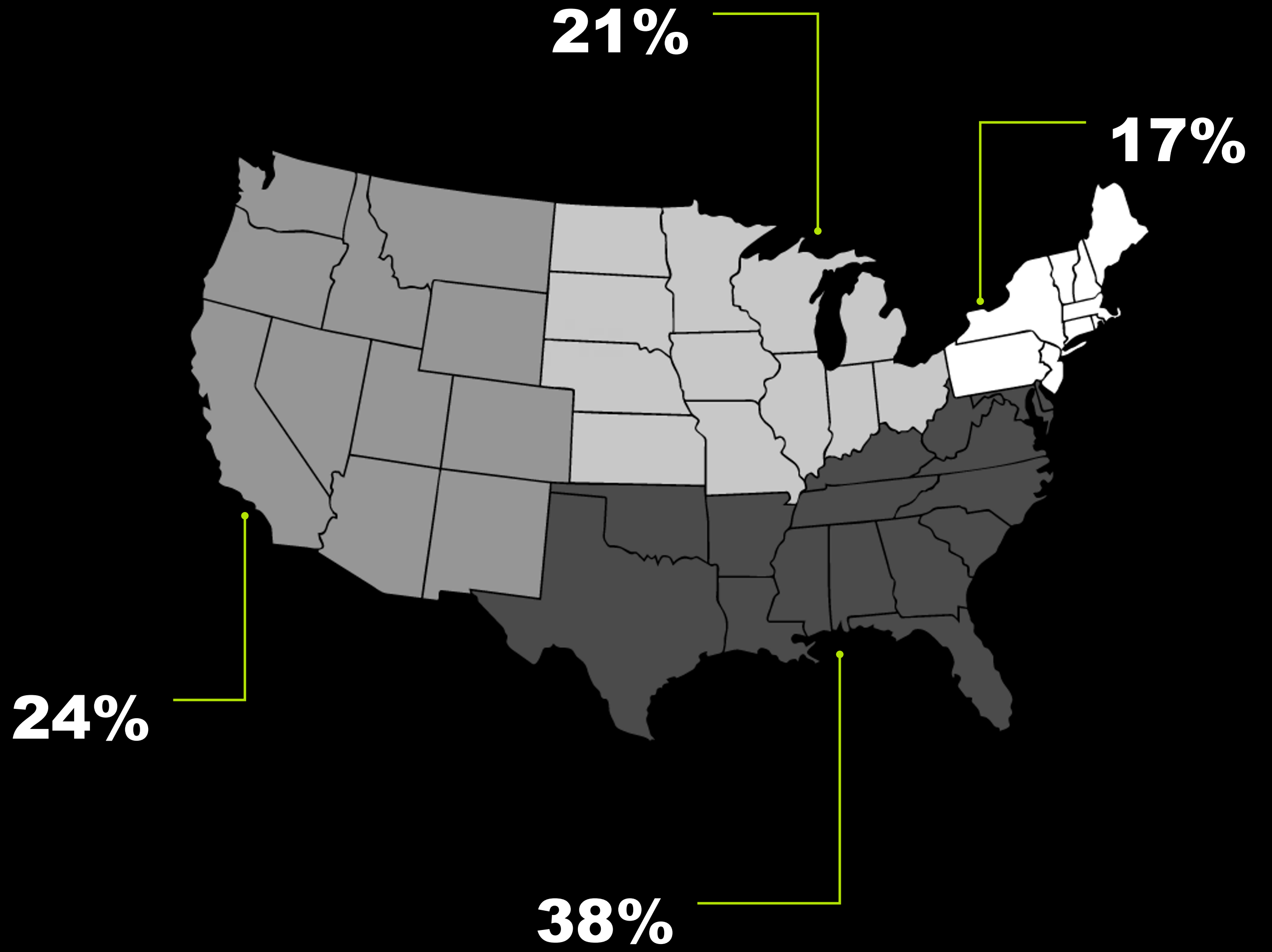
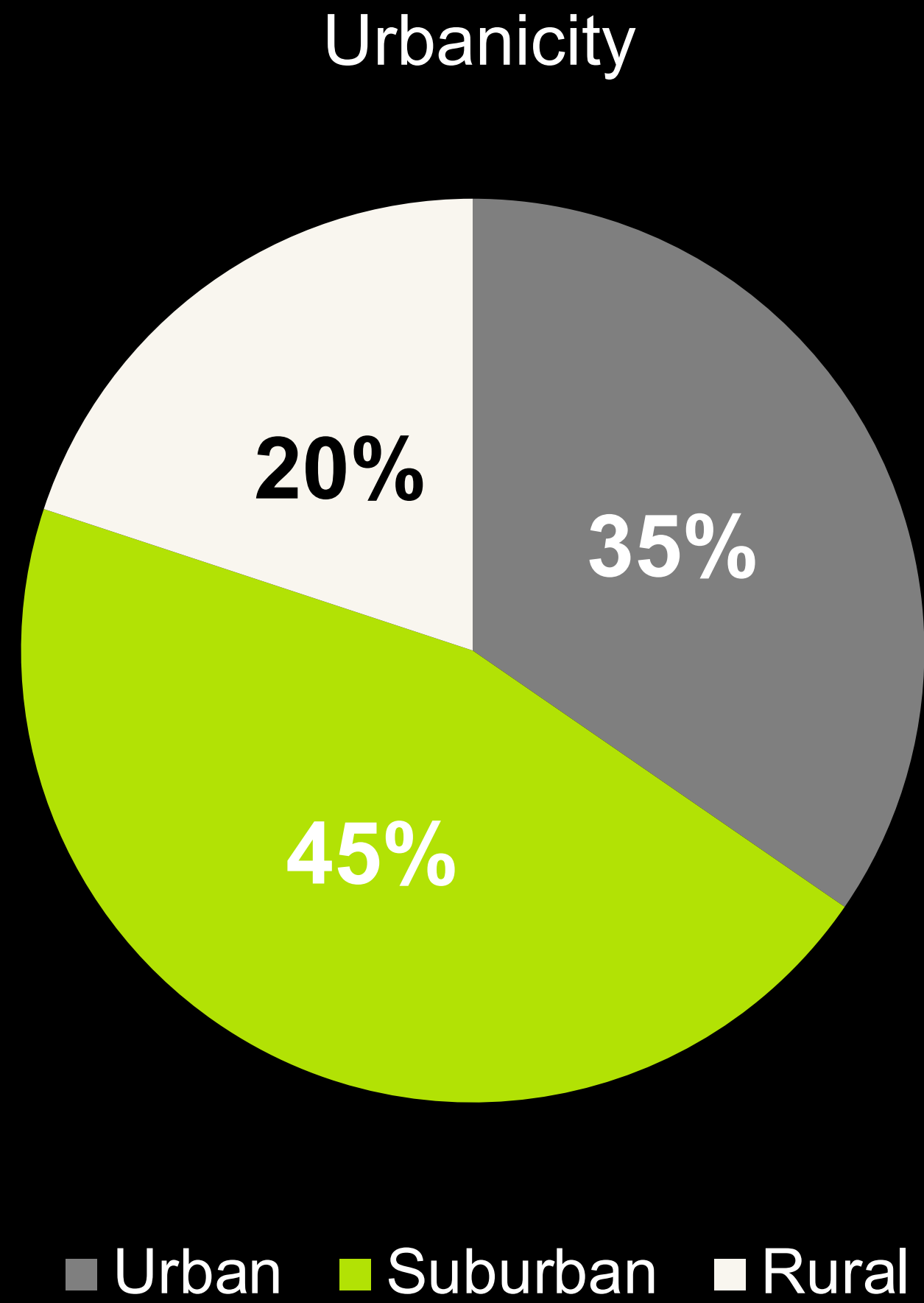
MOE \pm 3.41%

Panel: General Population

Collected: 9/24/21, 9/25/21

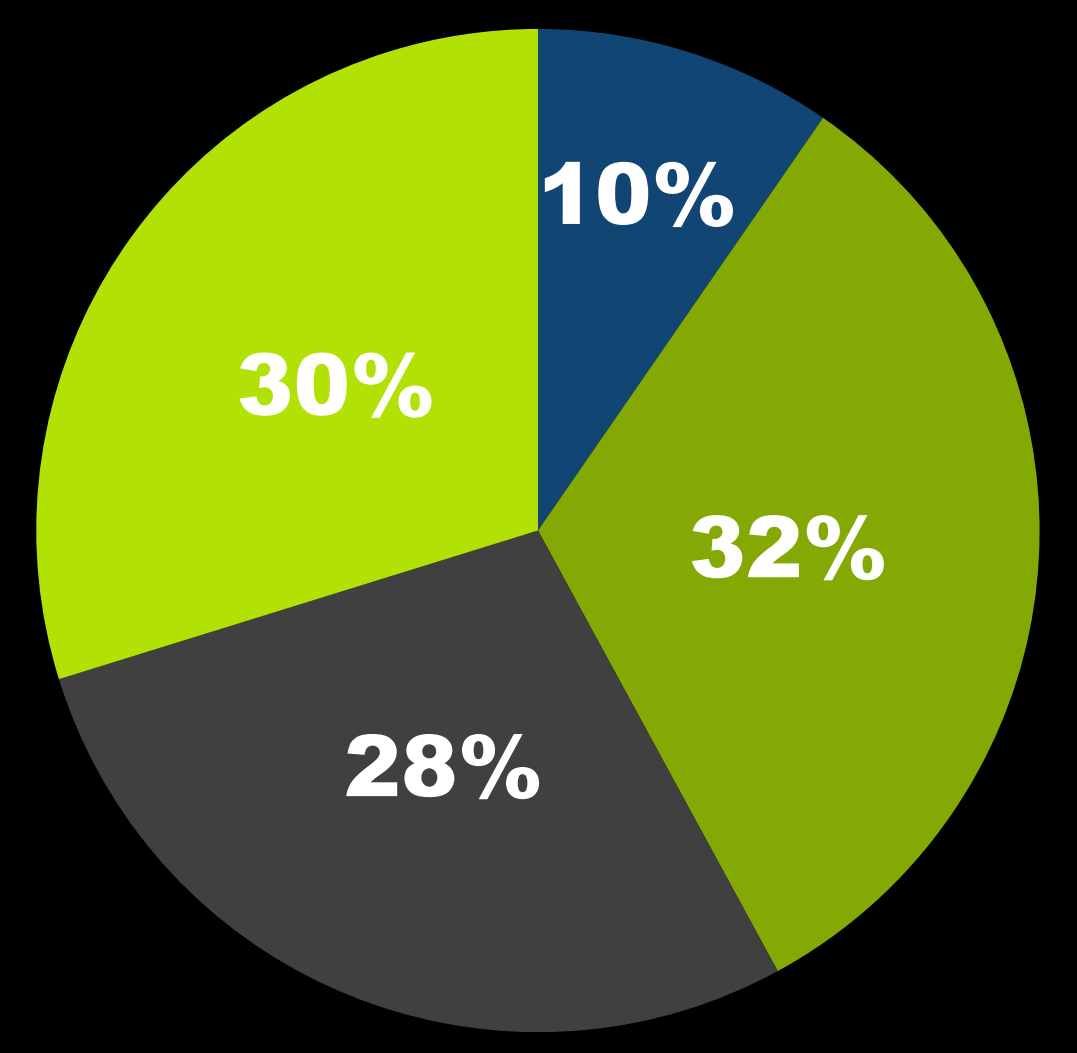


Panel Composition



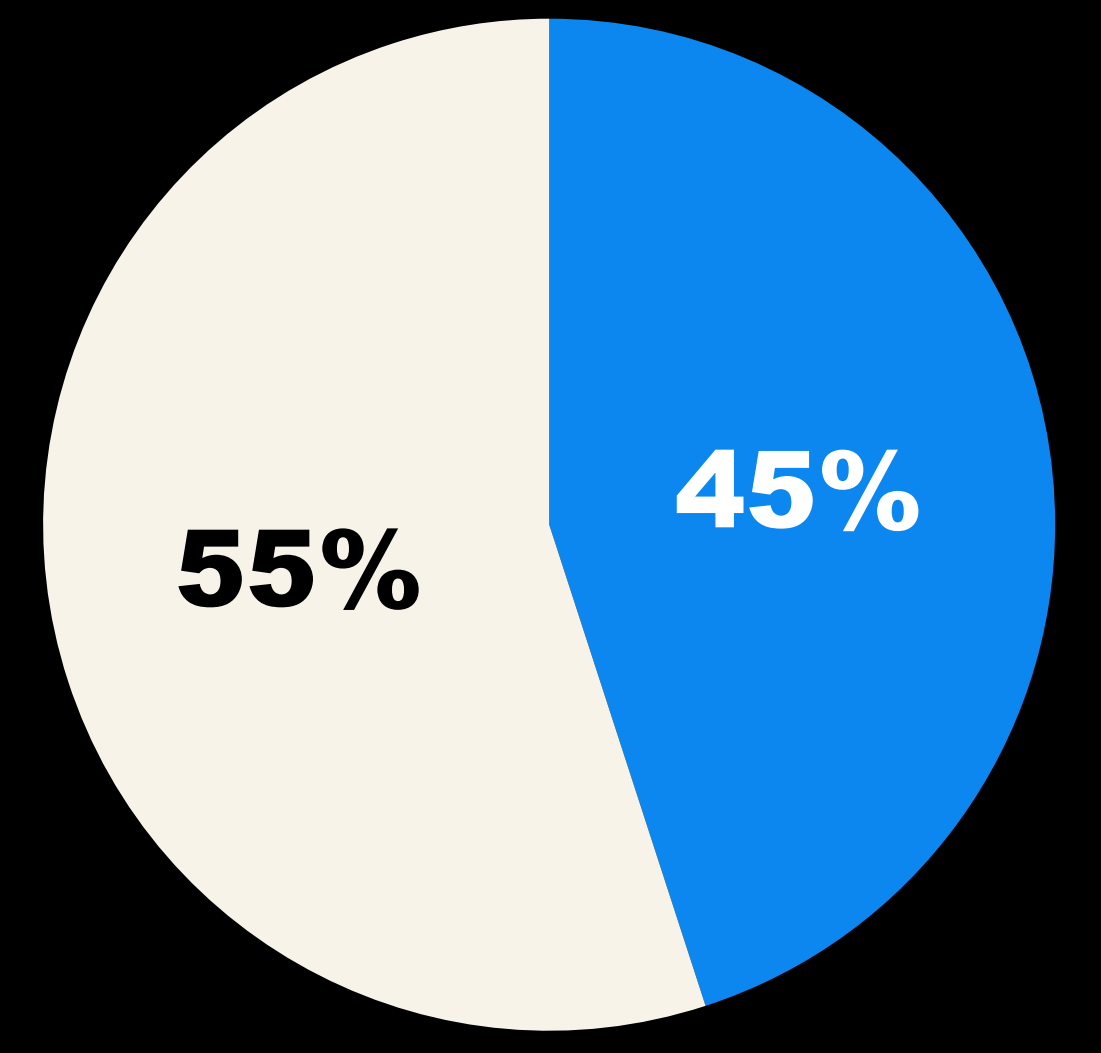


Generation



■ Gen Z ■ Millennial ■ Gen X ■ Boomer

Gender



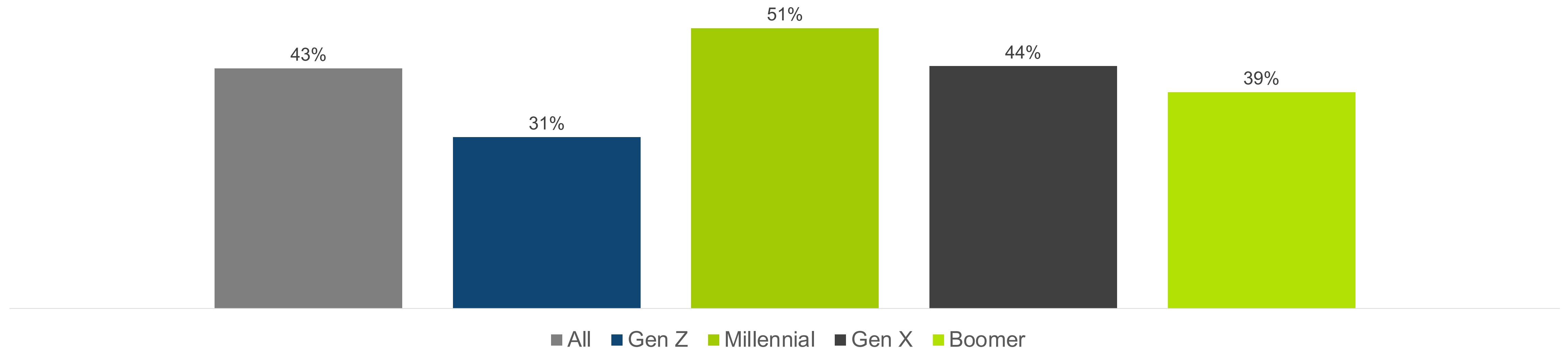
■ Male ■ Female



Home Improvement Shopping Behaviors

43% of homeowners report making a home improvement purchase within the past year. More than half (51%) of Millennials did so.

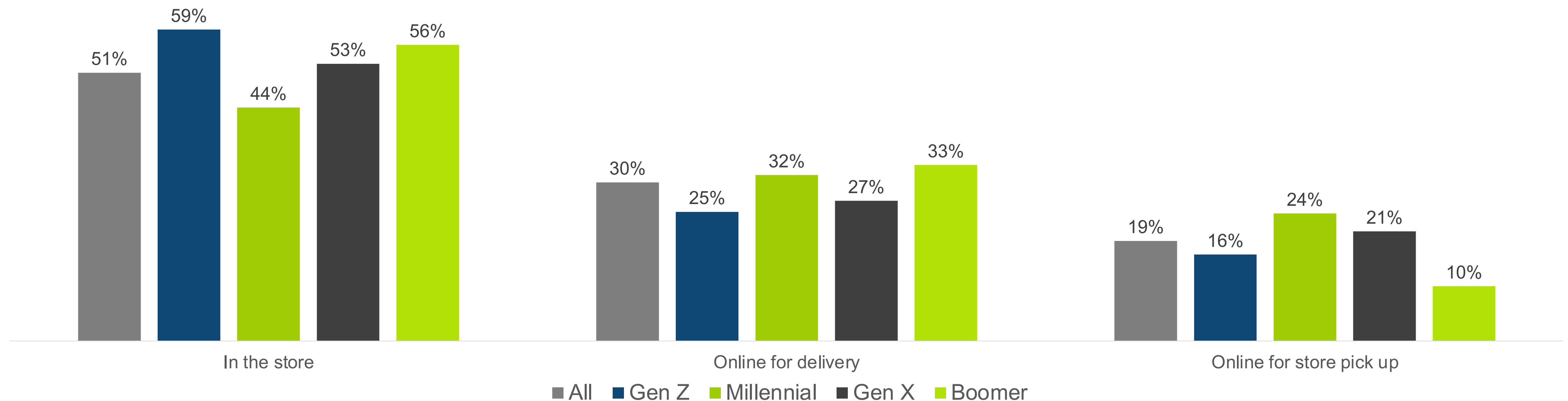
% Who made a home improvement purchase in the past year



Have you made any home improvement purchases in the past year?

More than half of the purchases (51%) were made in a store. Among online purchases, delivery (30%) was preferred to pickup (19%) by nearly 2 to 1.

Home improvement purchase methods



Approximately what percentage of your home improvement purchases in the past year have been made in the following ways. Total must equal 100%.

The two most influential reasons for purchasing products in store are the ability to handle the products (30%) and the ability to quickly assess the offering (26%).

Most influential on purchasing home improvement products in-store

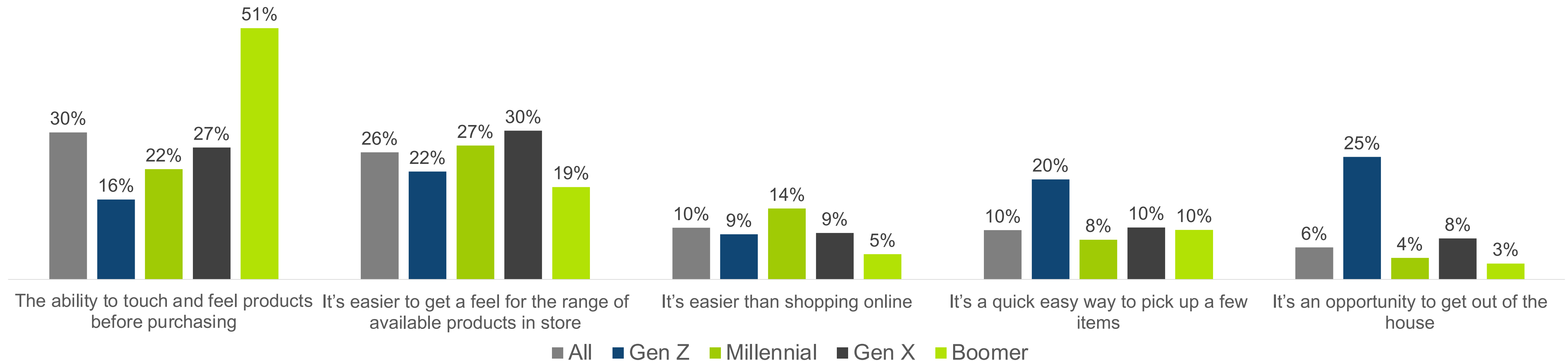


Which of the following has the greatest influence on your decision to purchase some or all of your home improvement products in the store?



Handling the product is far more important to Boomers (51%) than it is to other generations. 25% of GenZ cited getting out of the house as their primary motivation for shopping in store.

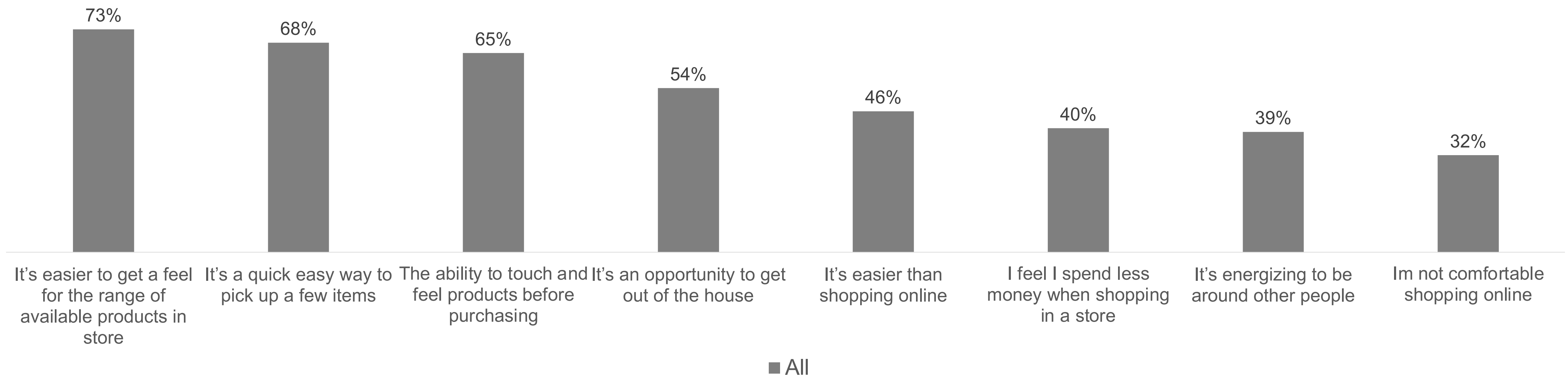
Most influential on purchasing home improvement products in-store



Which of the following has the greatest influence on your decision to purchase some or all of your home improvement products in the store?

Beyond the primary reason for shopping in-store, respondents cited assessing the assortment (73%), ease of picking up a few items (68%) and handling the product (65%) as influential or very influential on their decision to shop in store.

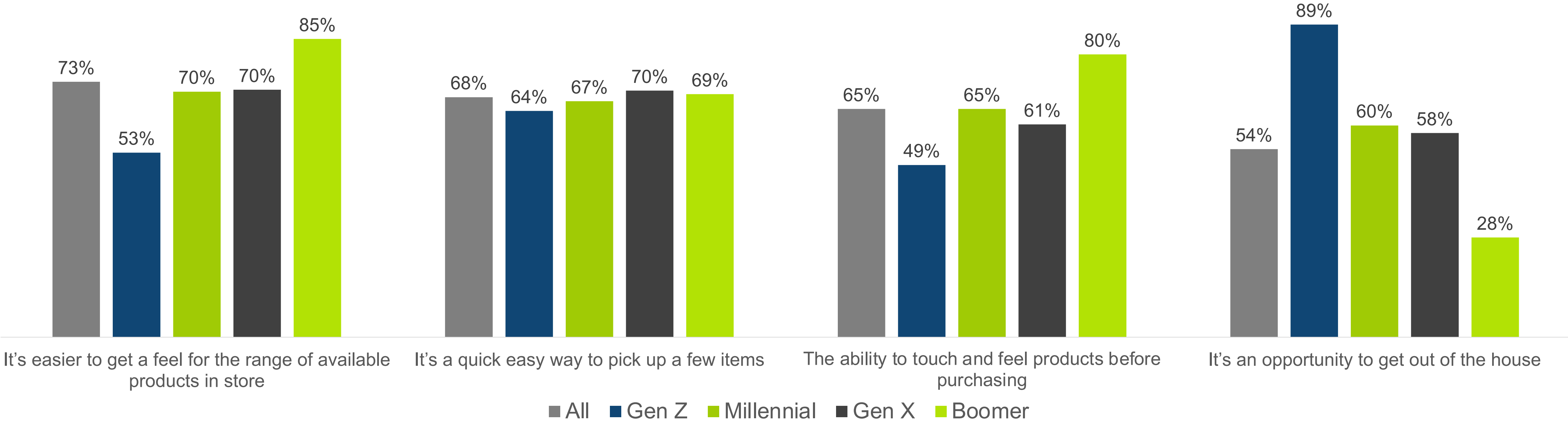
Influence of other factors that are not the “most influential”



How influential are the following on your decision to make some or all of your home improvement purchases in the store?

GenZ stands out as being less concerned about assessing the offering (53%) and much more focused on getting out of the house (89%).

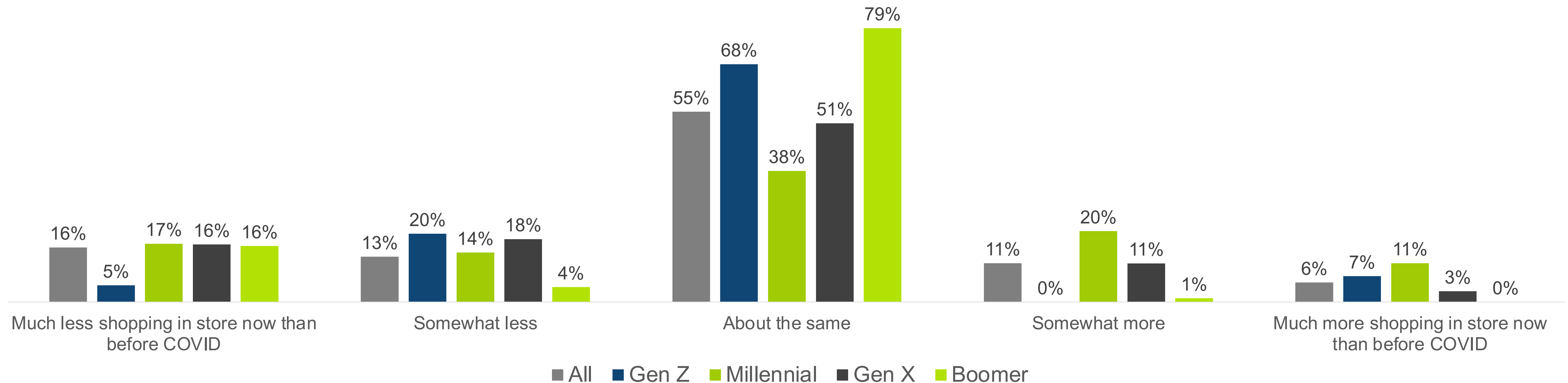
Influence of other factors that are not the “most influential”



How influential are the following on your decision to make some or all of your home improvement purchases in the store?

In-store shopping has not returned to pre-COVID norms. 29% of respondents report shopping in-store less now than before COVID while only 17% report shopping in-store more often.

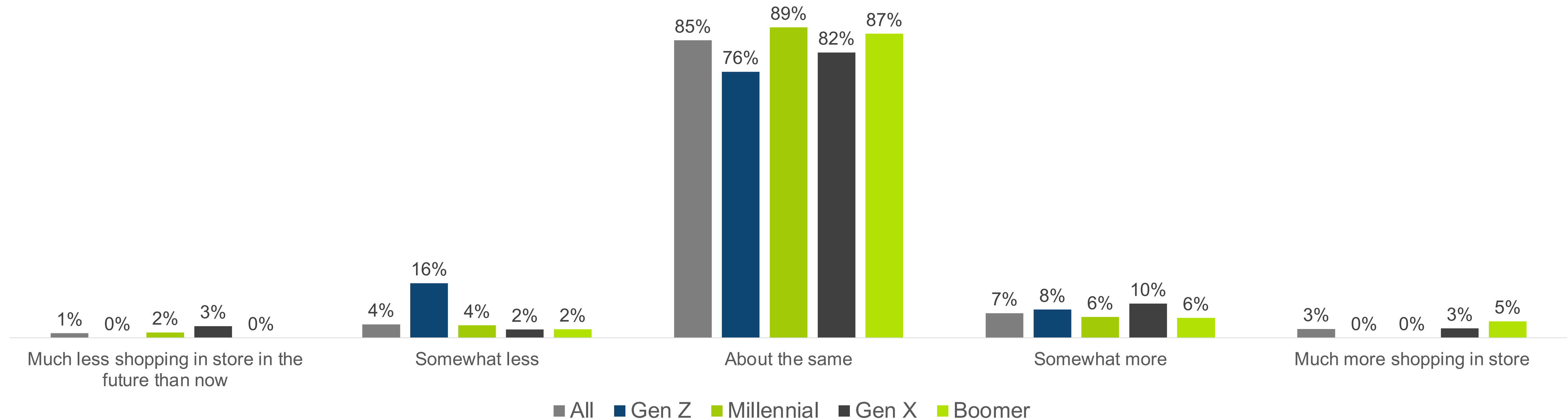
In-store home improvement shopping now vs. before COVID-19



How does your in-store home improvement shopping now compare to the in-store home improvement shopping you did before COVID?

Most people (85%) expect their home improvement shopping behaviors to remain the same post COVID.

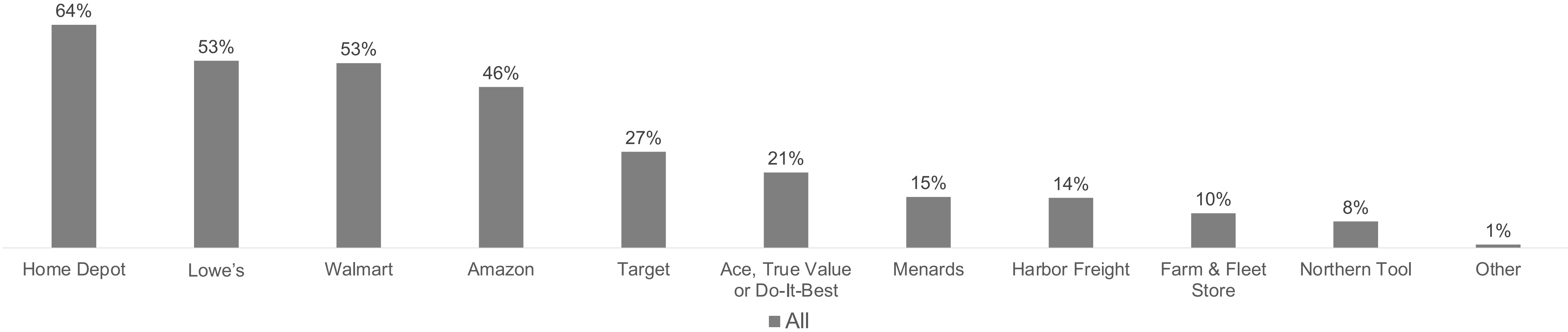
Expected in-store home improvement shopping after COVID-19 vs. now



Assuming COVID can be brought under control, how do you think your in-store home improvement shopping will compare then to the in-store home improvement shopping you're doing now?

Not surprisingly, Home Depot (64%) and Lowe's (54%) are the most popular shopping destinations, but many people have made at least a portion of their purchases from Walmart (53%) and Amazon (46%).

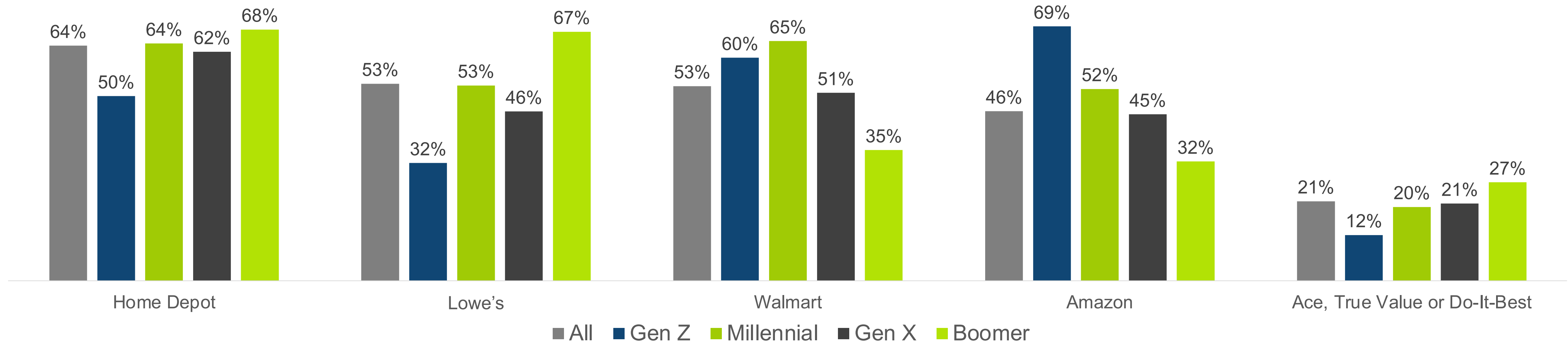
Retailer purchased home improvement products in the last 2 years



At which of the following stores or store types have you purchased home improvement products in the past 2 years?

Much of the action at Walmart and Amazon is being driven by GenZ (60%, 69%) and Millennials (65%, 52%).

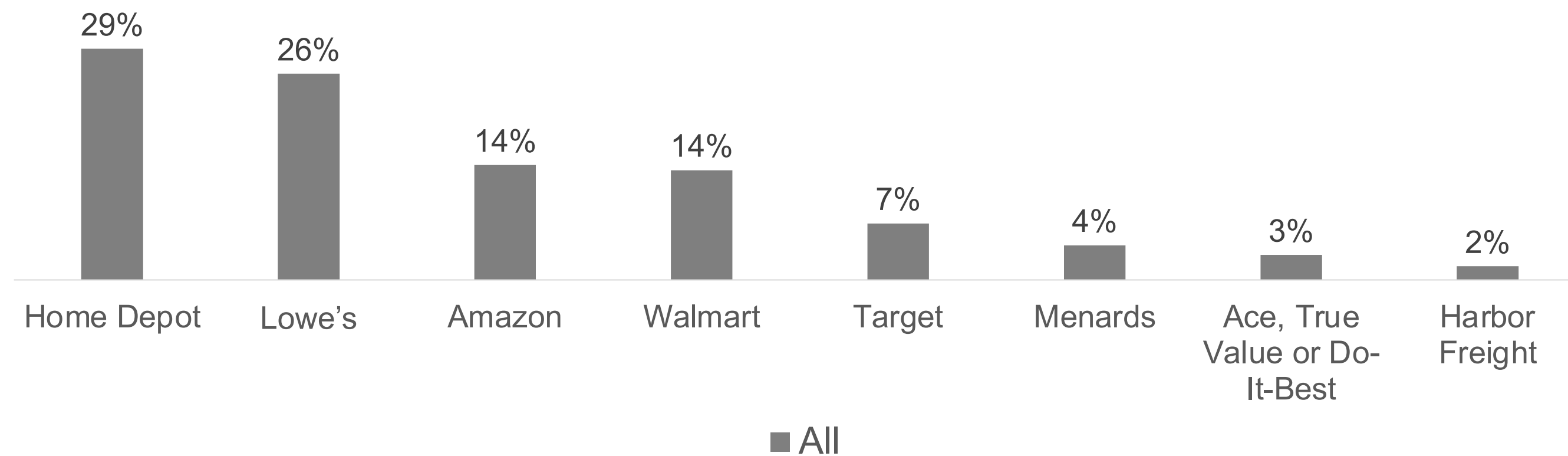
Retailer purchased home improvement products in the last 2 years



At which of the following stores or store types have you purchased home improvement products in the past 2 years?

Home Depot (29%) and Lowe's (26%) retain a strong hold on store preference. At 29%, Home Depot is preferred more than 2 to 1 over Amazon (14%) and Walmart (14%).

Home improvement retailer preference

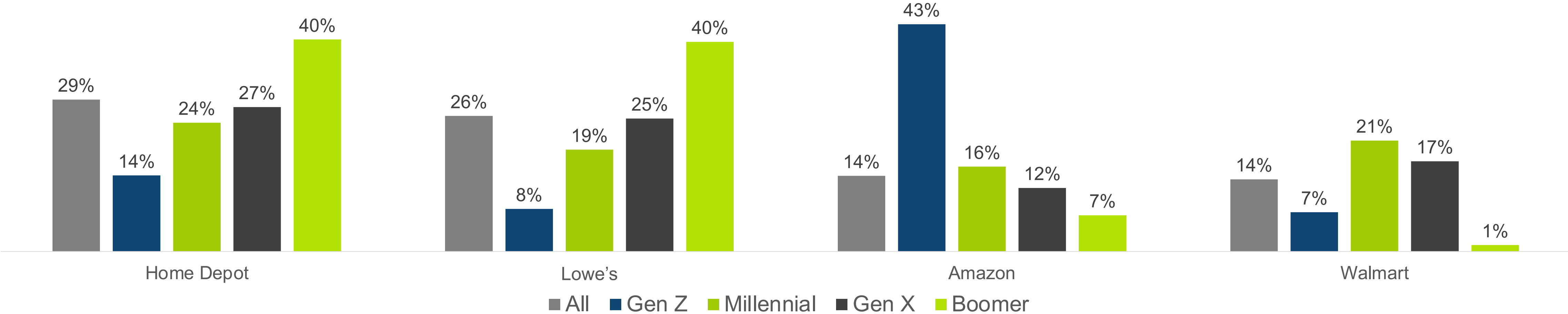


At which of the following would you most prefer to buy home improvement products?



Among generations, however, the story is quite different. Amazon enjoys particular favor among GenZ (43%) for home improvement products.

Home improvement retailer preference



At which of the following would you most prefer to buy home improvement products?

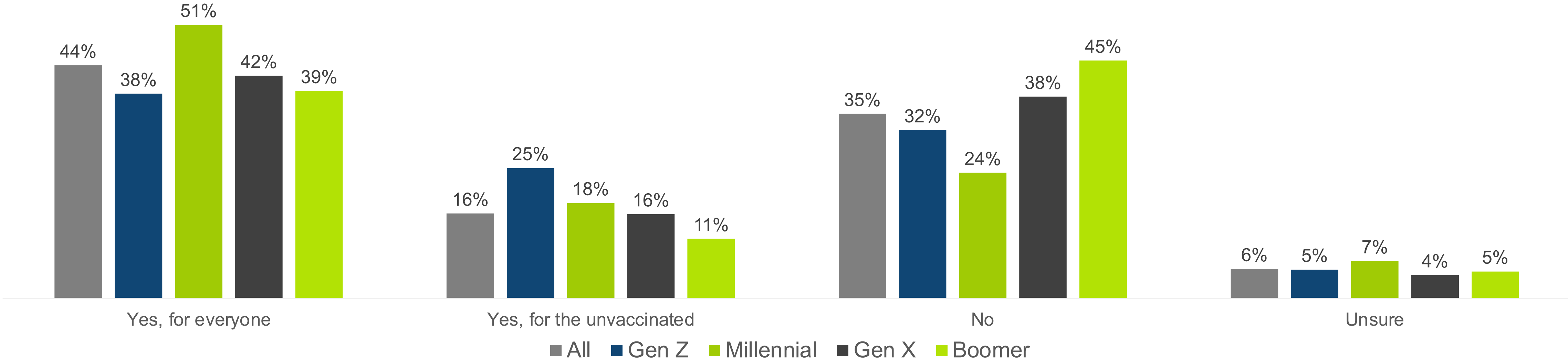


COVID-19



60% of respondents report living in a community that has a mask requirement of some form. Interestingly, 6% are unsure of the rules where they live.

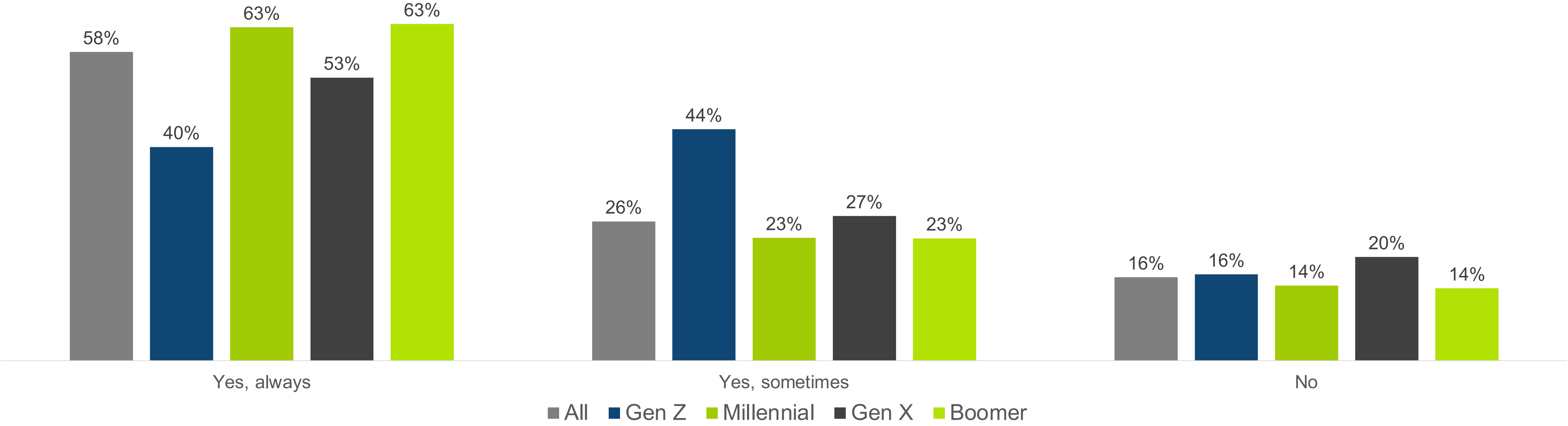
Area living in have a mask mandate in public locations



Does the area in which you live have a mask mandate for public places like the grocery store, sporting events, etc.?

The vast majority of respondents (84%) report wearing a mask at least some of the time.

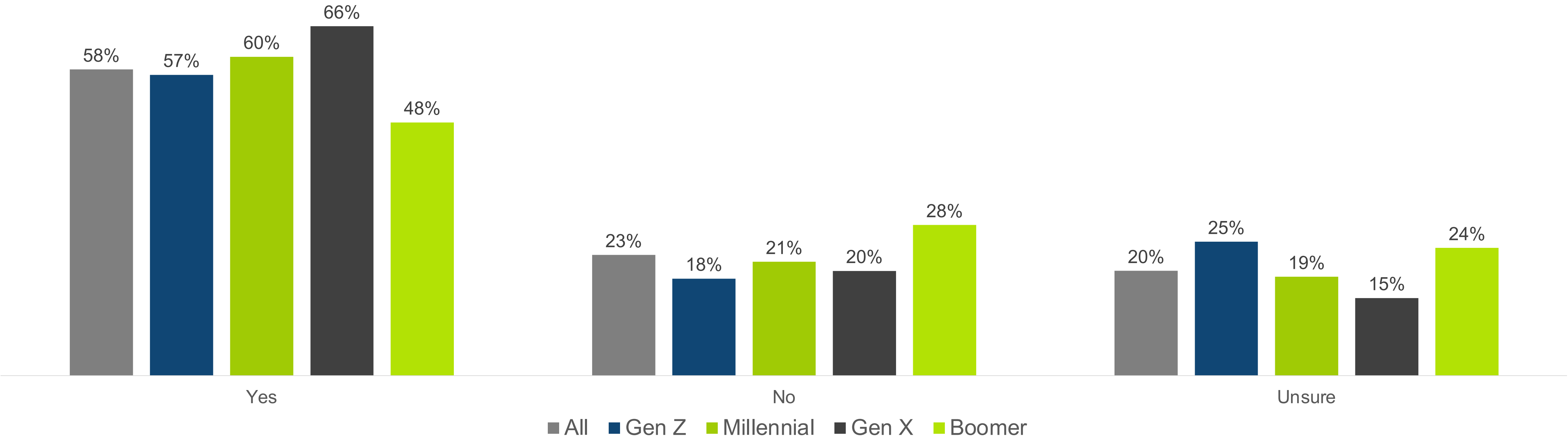
Wear a mask in public places



Do you wear a mask when you are in public places?

58% of people live in a community which has a mask requirement for school-age children. People without children often aren't aware of the policies in effect.

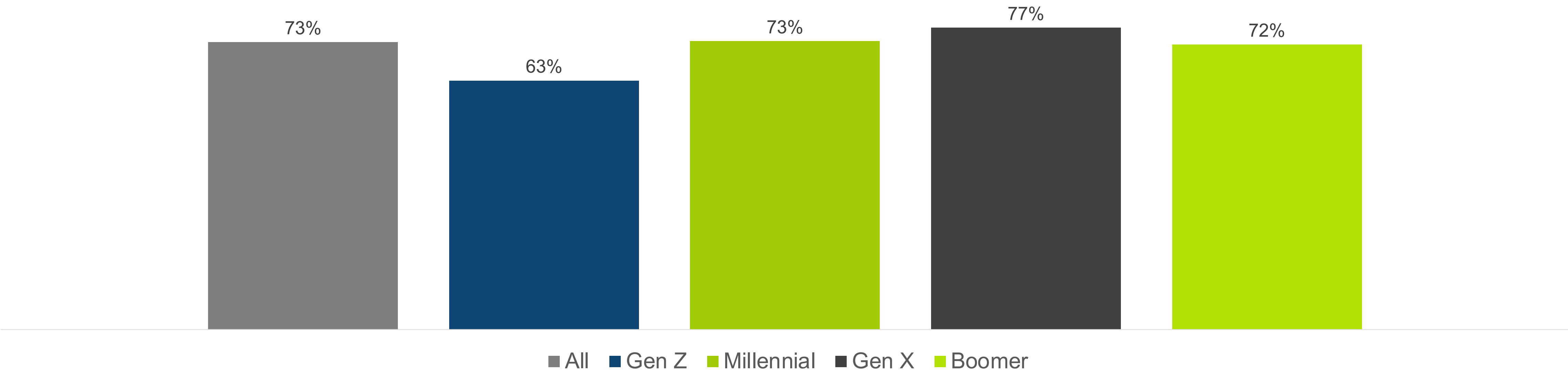
Local community has a mask mandate for school-aged children



Does the community in which you live have a mask mandate for school-age children?

Nearly three-quarters of respondents (73%) feel masks should be required in school.

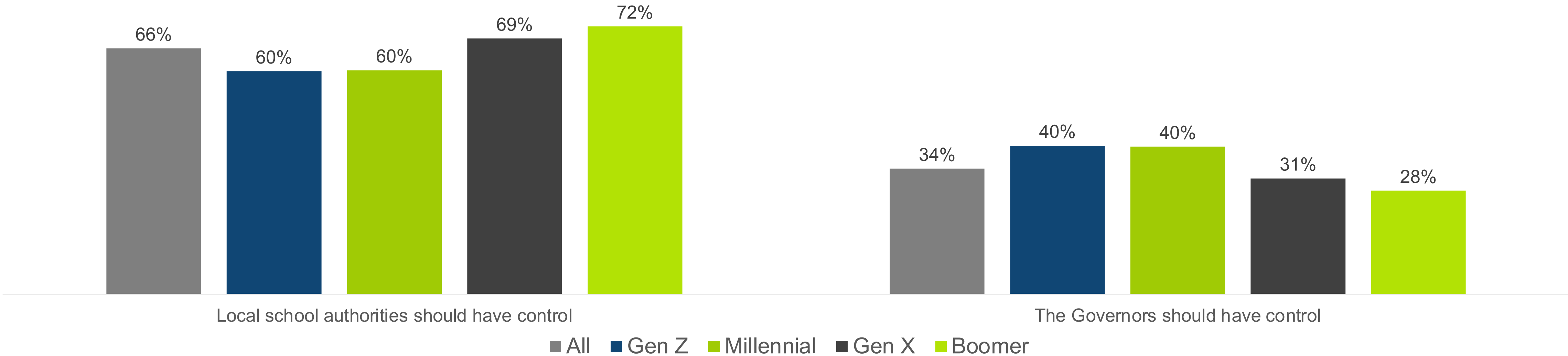
% Who think children should wear masks in school



Do you think children should have to wear a mask to school?

66% of respondents feel that the decision on whether school-age children should wear masks should be the purview of local authorities, not the governor.

Mask mandate authority: governor or local school officials



Some governors have banned mask mandates for schools. Do you think that should be the governor's decision or should the authority belong to the local school authorities?

Summary

Home Improvement Shopping Behaviors

- 43% of homeowners report making a home improvement purchase within the past year. More than half (51%) of Millennials did so.
- More than half of the purchases (51%) were made in a store.
 - Among online purchases, delivery (30%) was preferred to pickup (19%) by nearly 2 to 1.
- The two most influential reasons for purchasing products in a store are the ability to handle the products (30%) and the ability to quickly assess the offering (26%).
 - Handling the product is far more important to Boomers (51%) than it is to other generations.
 - 25% of GenZ cited getting out of the house as their primary motivation for shopping in-store.
- Beyond the primary reason for shopping in-store, respondents cited assessing the assortment (73%), ease of picking up a few items (68%) and handling the product (65%) as influential or very influential on their decision to shop in-store.
 - GenZ stands out as being less concerned about assessing the offering (53%) and much more focused on getting out of the house (89%).
- In-store shopping has not returned to pre-COVID norms. 29% of respondents report shopping in-store less now than before COVID, while only 17% report shopping in-store more often.

Summary

Home Improvement Shopping Behaviors – cont.

- Most people (85%) expect their shopping behaviors to remain the same post COVID.
- Not surprisingly, Home Depot (64%) and Lowe's (54%) are the most popular shopping destinations for home improvement products, but many people have made at least a portion of their purchases from Walmart (53%) or Amazon (46%).
 - Much of the action at Walmart and Amazon is being driven by GenZ (60%, 69%) and Millennials (65%, 52%).
- Home Depot (29%) and Lowe's (26%) retain a strong hold on store preference. At 29%, Home Depot is preferred more than 2 to 1 over Amazon (14%) and Walmart (14%).
 - Among generations, however, the story is quite different. Amazon enjoys particular favor among Gen Z (43%).

Summary

COVID-19

- 60% of respondents reported living in a community that has a mask requirement of some form. Interestingly, 6% are unsure of the rules where they live.
- The vast majority of respondents (84%) report wearing a mask at least some of the time.
- 58% of people live in a community that has a mask requirement for school-age children. People without children often aren't aware of the policies in effect.
- Nearly three-quarters of respondents (73%) feel masks should be required in school.
- 66% of respondents feel that the decision on whether school-age children should wear masks should be the purview of local authorities, not the governor.