

THE GREAT AWAKENING

12 Months. 12 Findings.

Implications for Brand and Business Strategies After a Year
of COVID-19 presented by The Harris Poll

Wednesday March 17, 12:30 – 1:30 PM ET

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THE **STAGWELL** GROUP

MDC  Partners

AGENDA

1 THE ROARING 21'S

2 CV-PTSD

3 DIGITAL, UNDIVIDED

4 THE BLENDERS

5 TURBO-INJECTED
INFLUENCERS

6 D2CONFIDENCE

7 VIVA LA LOWER FUNNEL

8 UN-CANCEL CULTURE

9 TECH RIFT

10 GLAM HOMEBODIES

11 TRAVEL BOUND

12 REPUTATION REVIVED

TREND

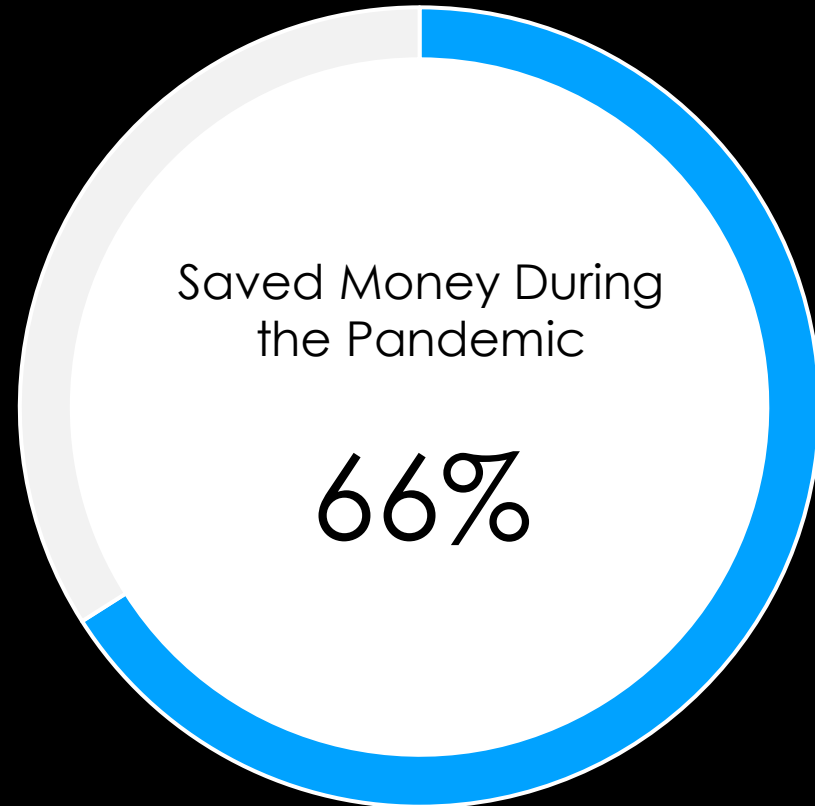
1

THE ROARING 21'S

Every Company and Brand Needs to Re-think Its Relevance, Customers, And Offerings for The Post-Pandemic Marketplace; One Where Assumptions From 2019 May No Longer Hold

THE ROARING 21'S

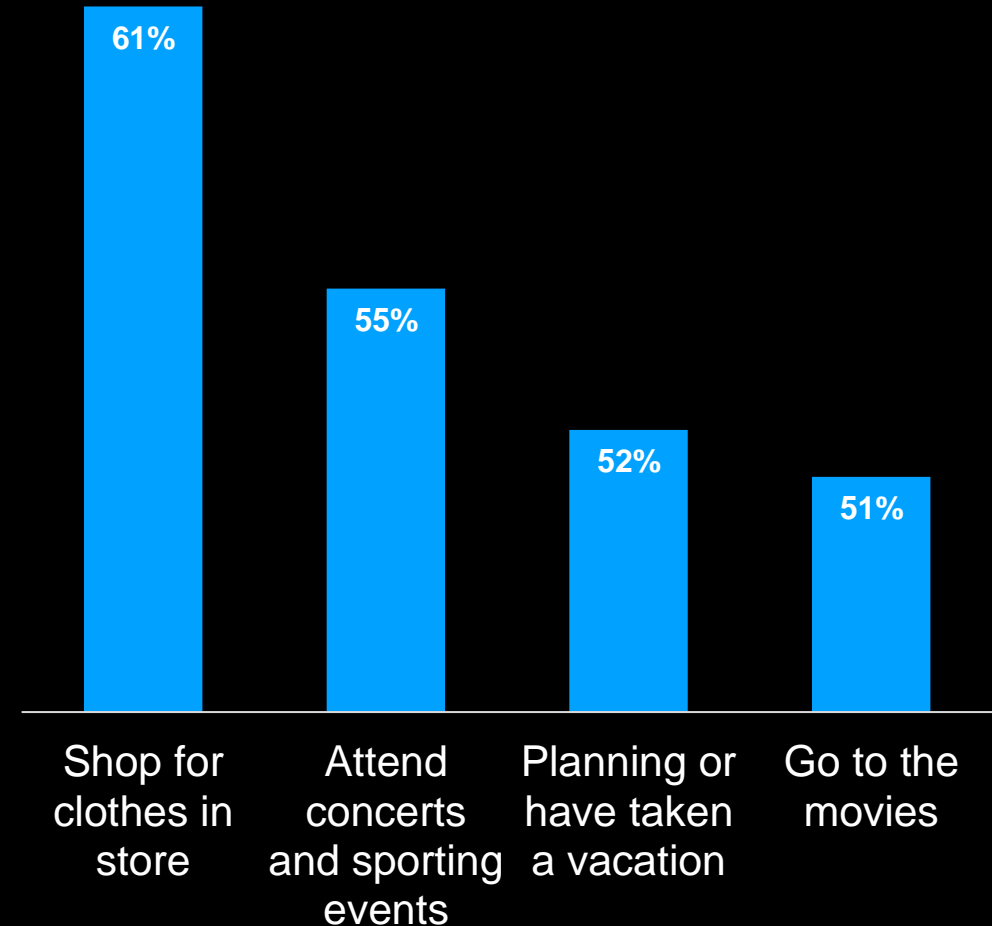
Two-thirds (66%) of employed Americans say they were able to save more money than they otherwise would have during the pandemic.



THE ROARING 21'S

(53%) of individuals and (61%) HH's \$100K+ say the vaccine rollout has influenced on how much they plan to spend this spring.

- Vaccine acceptance is 74%, up 11 pts from Jan 1; 64% of Americans are satisfied with the rollout.
- 30% of HH's \$100k+ plan to spend more compared to last spring, and 28% said they plan to spend more compared to this winter.
- (61%) say they will shop in stores for clothes, (55%) attend concerts and sports events, (52%) planning (or already took a vacation this year), (51%) see movies in theatres.



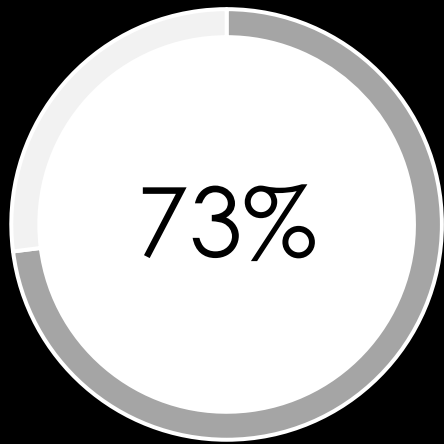
TREND

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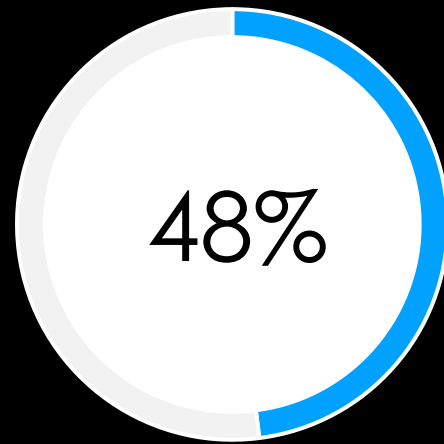
CV-PTSD

The Lingering Psychological Effects of COVID-19 Will Shape New Consumer Behaviors and Values Well Past the Pandemic Itself.

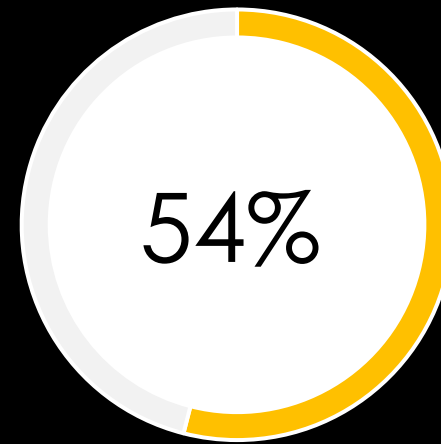
CV-PTSD



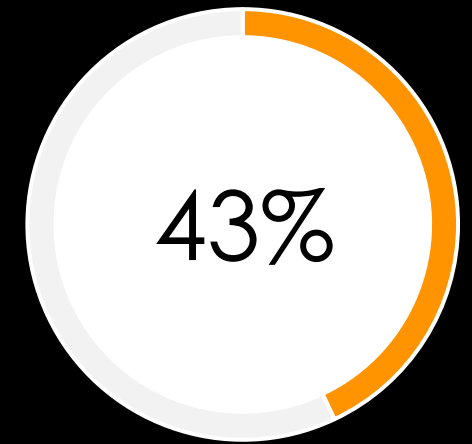
“COVID will change the way we shop forever”



“I prefer not to use cash anymore”



“I would be happy to never shake someone’s hand again”



“I still make fewer trips to the store and stock up when I’m there”

TREND

3

DIGITAL, UNDIVIDED

During the Pandemic Digital has Gone from the Next Generation To Every Generation

DIGITAL, UNDIVIDED

64% say COVID has shown me how easy it is to shop online and that it has “helped make shopping more frictionless” (58%)

Since the start of the pandemic:



(31%) started using QR codes more



(43%) started using contactless payments



(28%) are interested in using augmented reality to learn about products while shopping

DIGITAL, UNDIVIDED

65% plan to continue to use telehealth in the future

48%

of all Seniors 65+ plan to use telehealth moving forward

35%

of the general public would replace primary care doctors for qualified doctors-on-demand via telehealth

TREND

4

THE BLENDERS

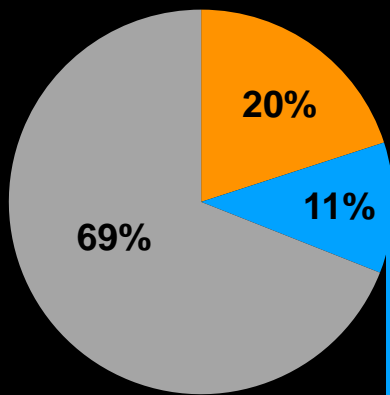
Out of Necessity, Americans Master Hybrid-Off-and-Online Living, Shopping, Working and Entertaining

THE BLENDERS

Post-COVID, consumers want a hybrid of digital + in-person, across every area of life

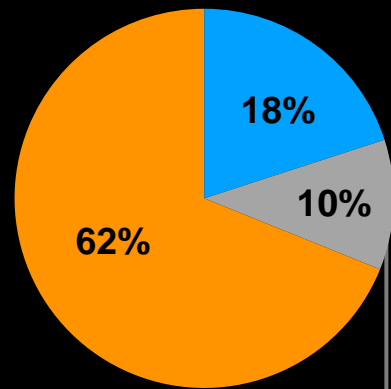
● Hybrid ● In-Person Only ● Online Only

SHOPPING



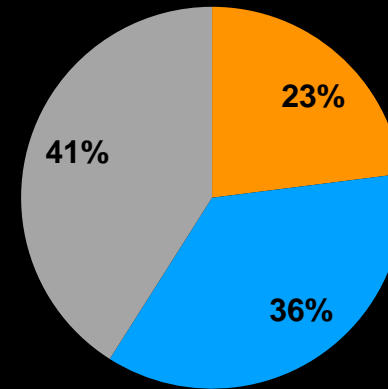
Online Only
29% Gen Z
14% Millennial
9% Gen Z
4% Boomer

GYM

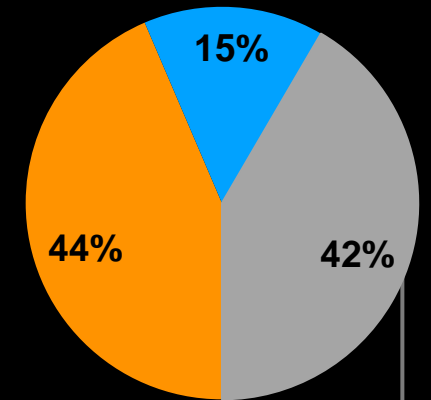


Hybrid
44% Gen Z
34% Millennial
35% Gen Z
29% Boomer

SCHOOL



HEALTHCARE



Hybrid
50% Black
50% Hispanic
40% Asian
39% White

THE BLENDERS

M

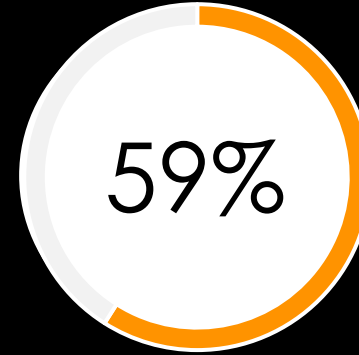
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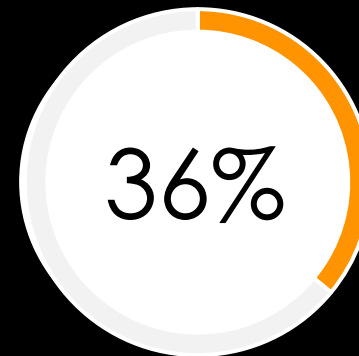
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F

Post-pandemic, the ideal work model is **2 days in the office** and **3 days remote**



will miss not having to dress up to go out when things go back to normal



will miss not being able to wear athleisure, pajamas, sweats in the office

TREND

5

TURBO-INJECTED INFLUENCERS

With Consumers Out of Stores, Influencers Scrape All
The Authority

TURBO-INJECTED INFLUENCERS

43%

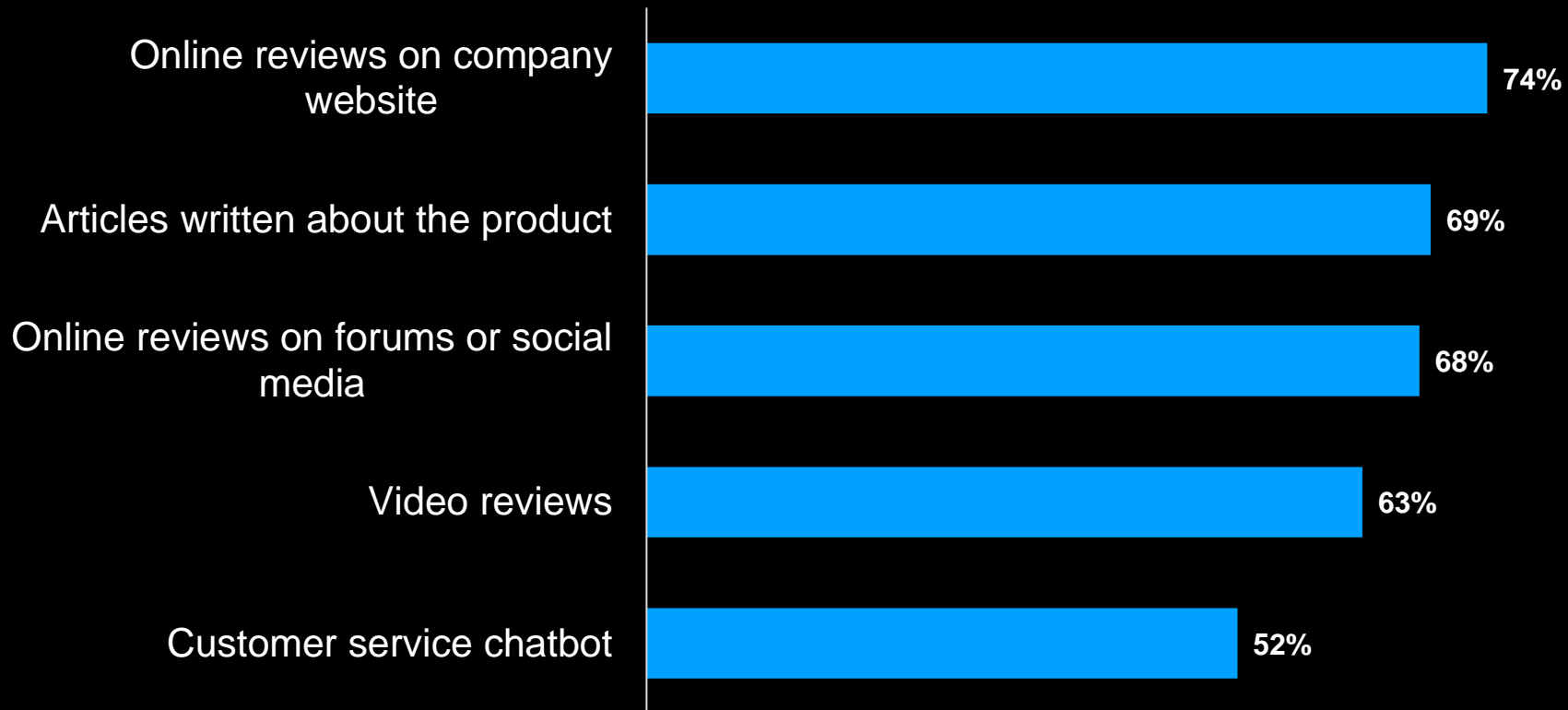
of the general population is using a mix of **new brands and brands they are familiar** with, a change forced by pandemic shortages

21%

of Millennials started using new brands they will replace with brands they used to use

TURBO-INJECTED INFLUENCERS

When it comes to decision making, consumers are relying more on:



34% plan on doing more online research before purchasing a product than they did pre-COVID

TREND

6

D2C CONFIDENCE

A Growing Resistance to Amazon is Fueling Business' Belief They Can Create Their Own Channel Outside

D2CONFIDENCE

In 2020, e-commerce spending grew (44%) compared with 2019, or about three times as fast as its average annual growth rate over the past decade. (WSJ)

D2CONFIDENCE



collectively represent

38%

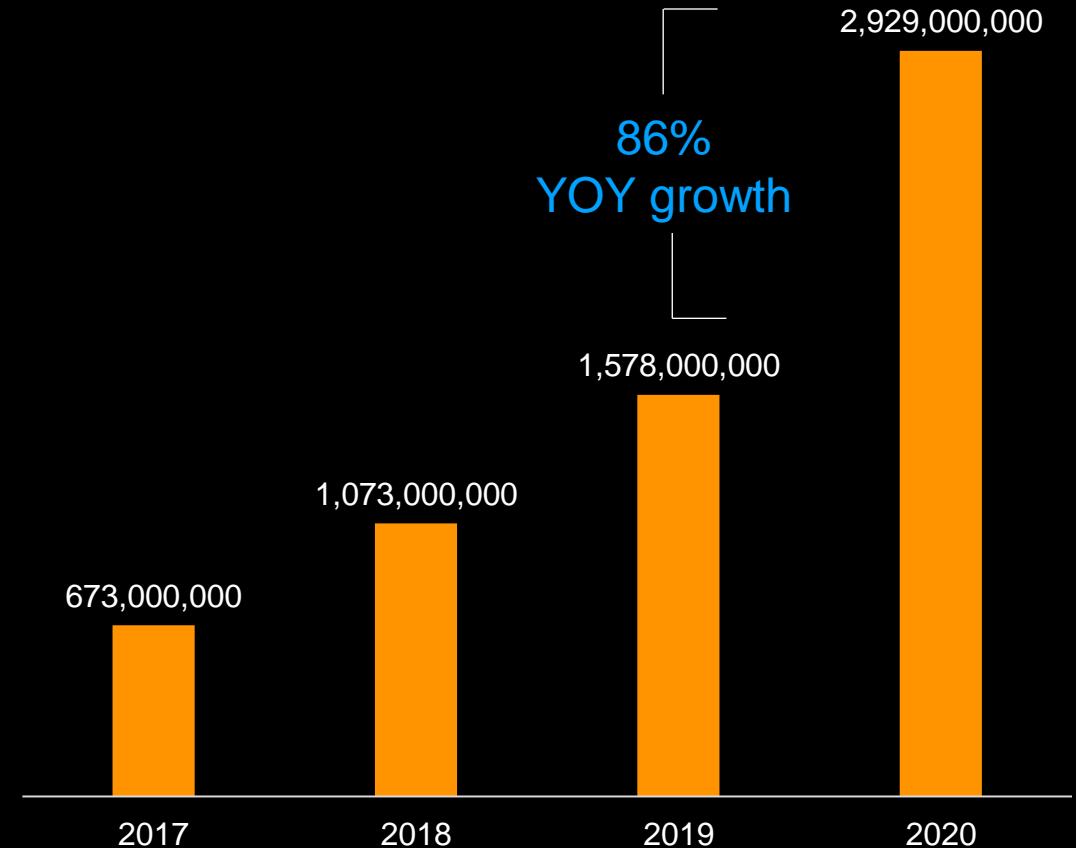
of U.S. online sales

D2CONFIDENCE



- 1.7 million sellers using its platform
- Sold \$119B in goods
- Accounted for 40% of the total value of goods sold on Amazon's third-party marketplace

Shopify revenue over time



TREND

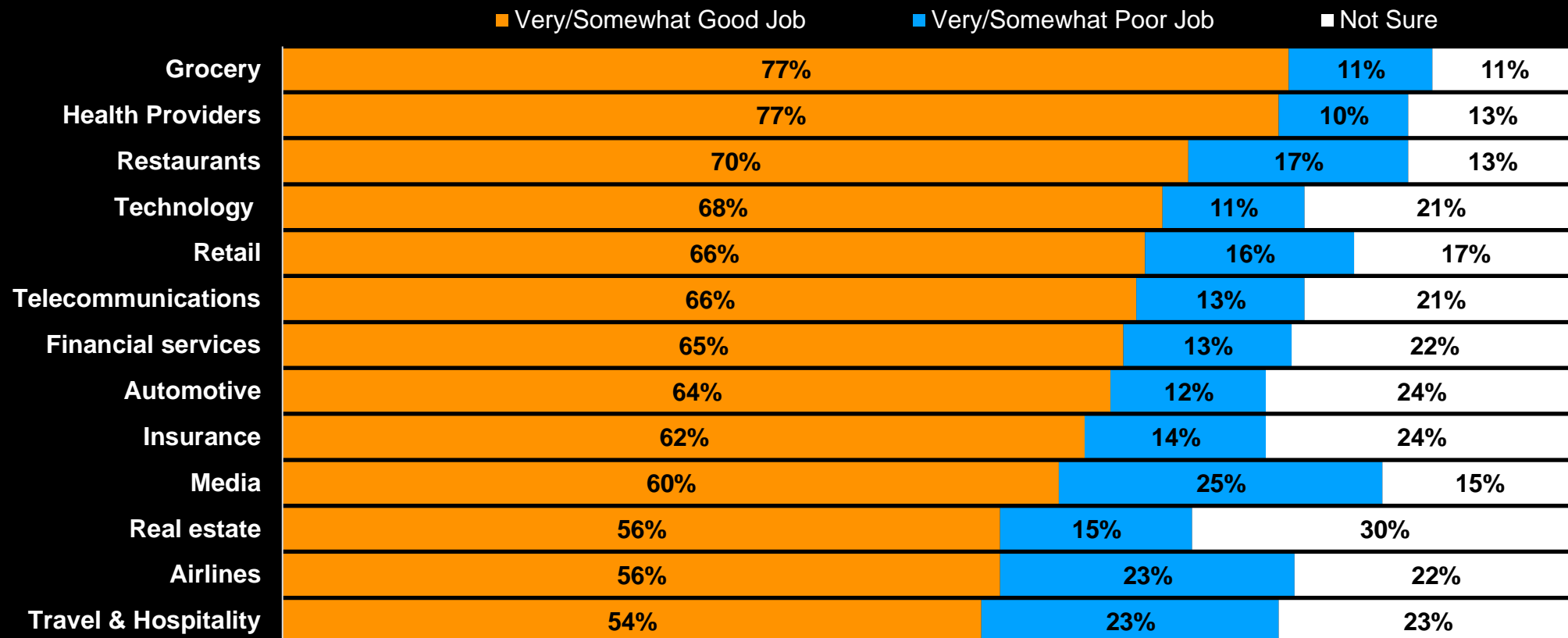
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VIVA LA LOWER FUNNEL

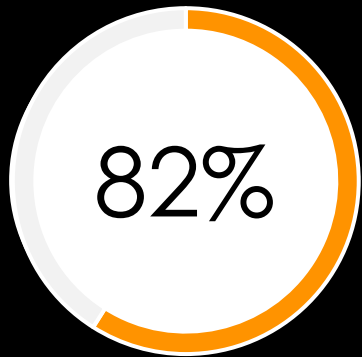
Performance Marketing Trumps Brand Marketing in
a DIY Digital Consumer World

VIVA LA LOWER FUNNEL

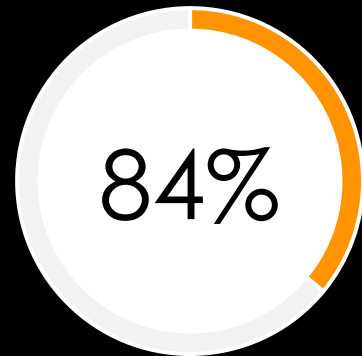
How good or poor of a job are the following industries doing in digitally adapting their products/services to the needs of consumers?



VIVA LA LOWER FUNNEL



Of US consumers have bought apparel online over the past 12 months



Of US consumers have bought personal goods online over the past 12 months

Of the 82% who bought apparel online:

- 41% were influenced by a brand's website
- 39% were influenced by web search
- 32% were influenced by social media (Facebook, Instagram, Twitter)

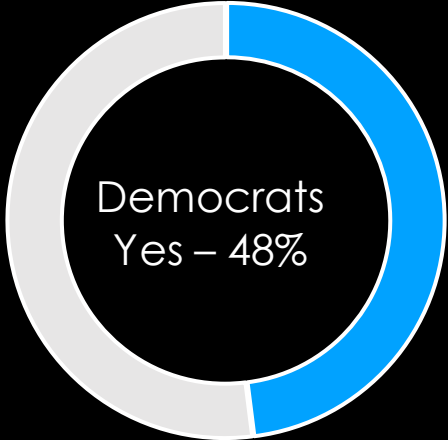
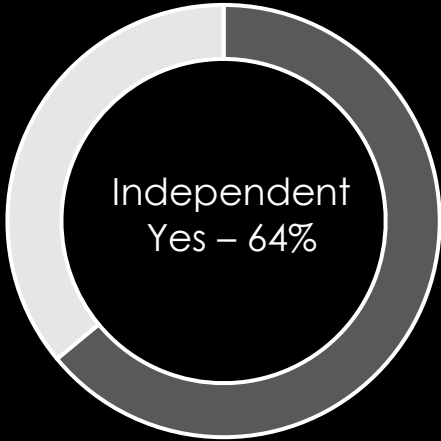
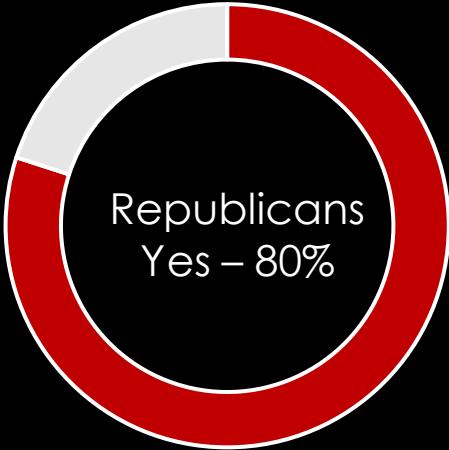
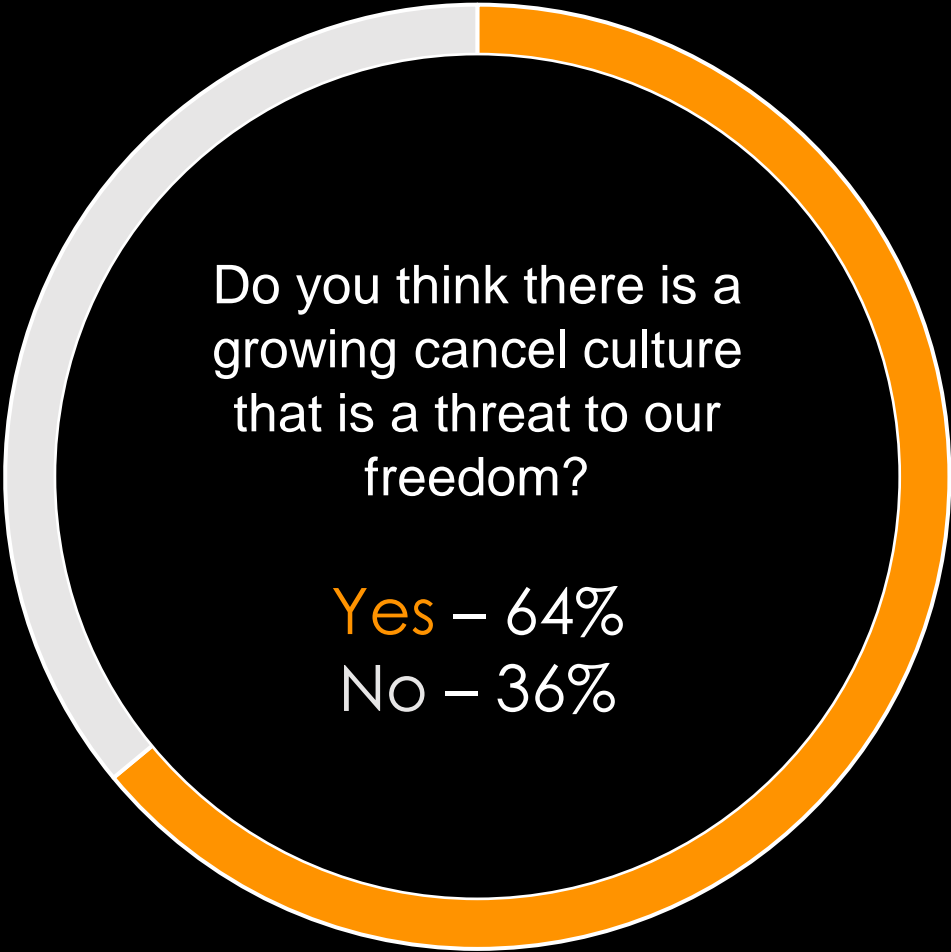
TREND

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UNCANCEL CULTURE

The Emerging Counter-Movement to Cancel The
Cancel Culture

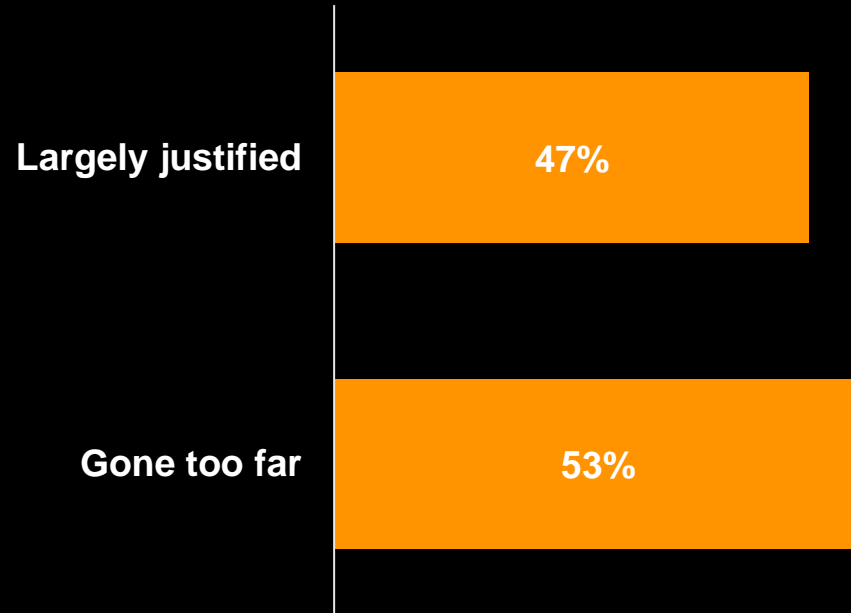
UNCANCEL CULTURE



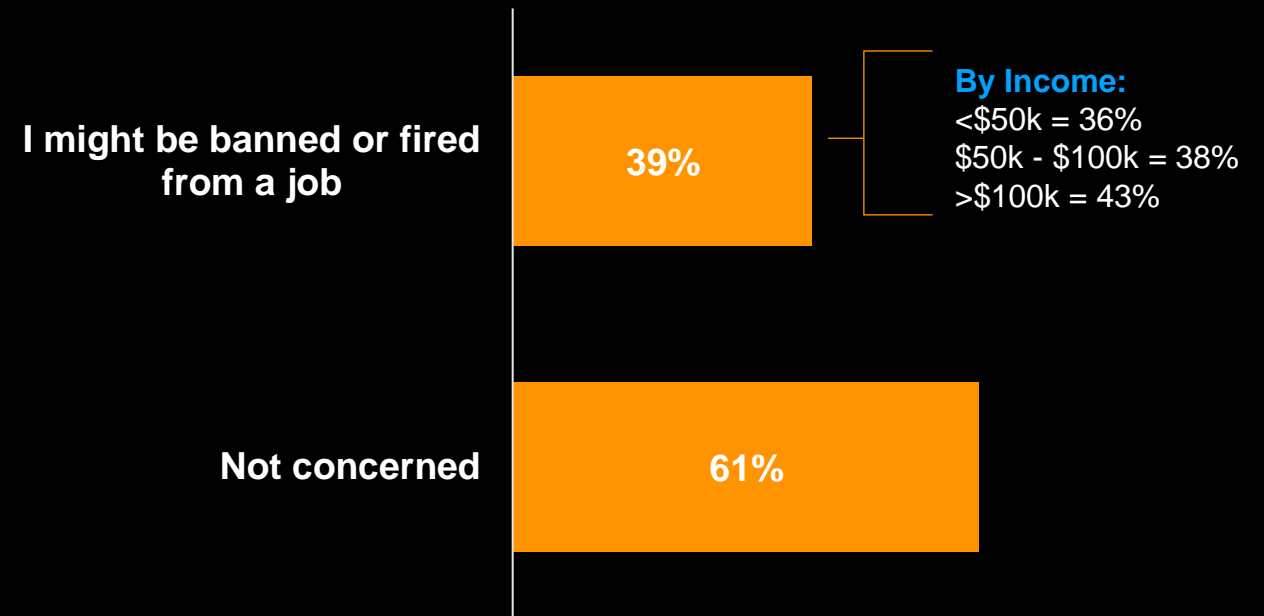
Source: Harvard Harris Poll

UNCANCEL CULTURE

Do you think the firing of individuals by employers over their online or other content or statements is largely justified or has it gone too far?



Are you concerned that if you were to express your true viewpoints on Twitter that you might be banned or fired from your job?



TREND

9

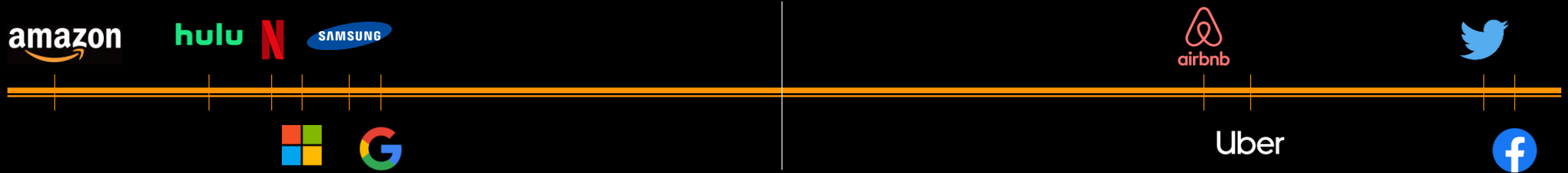
TECH RIFT

The Pandemic Forces a Fissure: Big Tech Becomes
'Good and Bad Tech'

TECH RIFT

POSITIVE
REPUTATION

NEGATIVE
REPUTATION

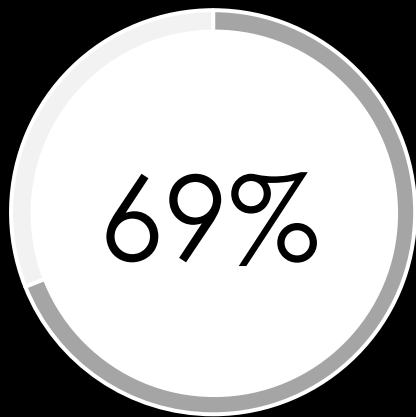


Amazon (74% favorable) and Google (70% favorable)
have higher approval than
Facebook (49% favorable) and Twitter (35% favorable)

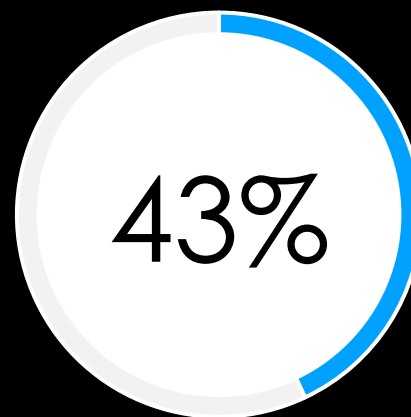
Source: Harvard Harris Poll

TECH RIFT

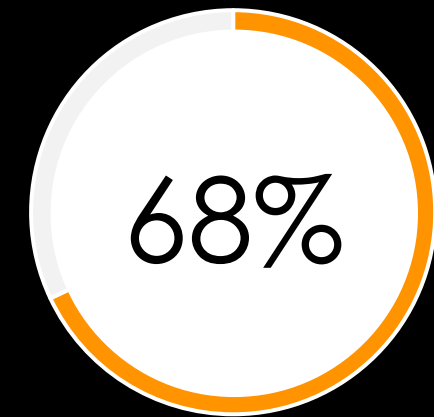
Social media platforms are experiencing a CRISIS OF TRUST



Don't trust social media, higher than:
Congress (56%)
Fmr. President Trump (55%)
National media (55%)



Don't trust the vaccine information they see on social media platforms



say social media companies should establish clear guidelines for credible information and only allow those sources to be shared

TREND

10

GLAM
HOMEBODIES

Stay at Home Meant Play at Home as The House
Became a Luxury Brand

GLAM HOMEBODIES



Nearly 6 in 10 said “my social network became smaller but more connected”

62% expect some friendships to become even closer after the pandemic

“I realized I prefer smaller social gatherings in a home over going to bars/restaurants”

75%

“I’ll miss enjoying the comfort of my home while socializing when things go back to normal”

72%

“During COVID I realized how much I loved entertaining at home”

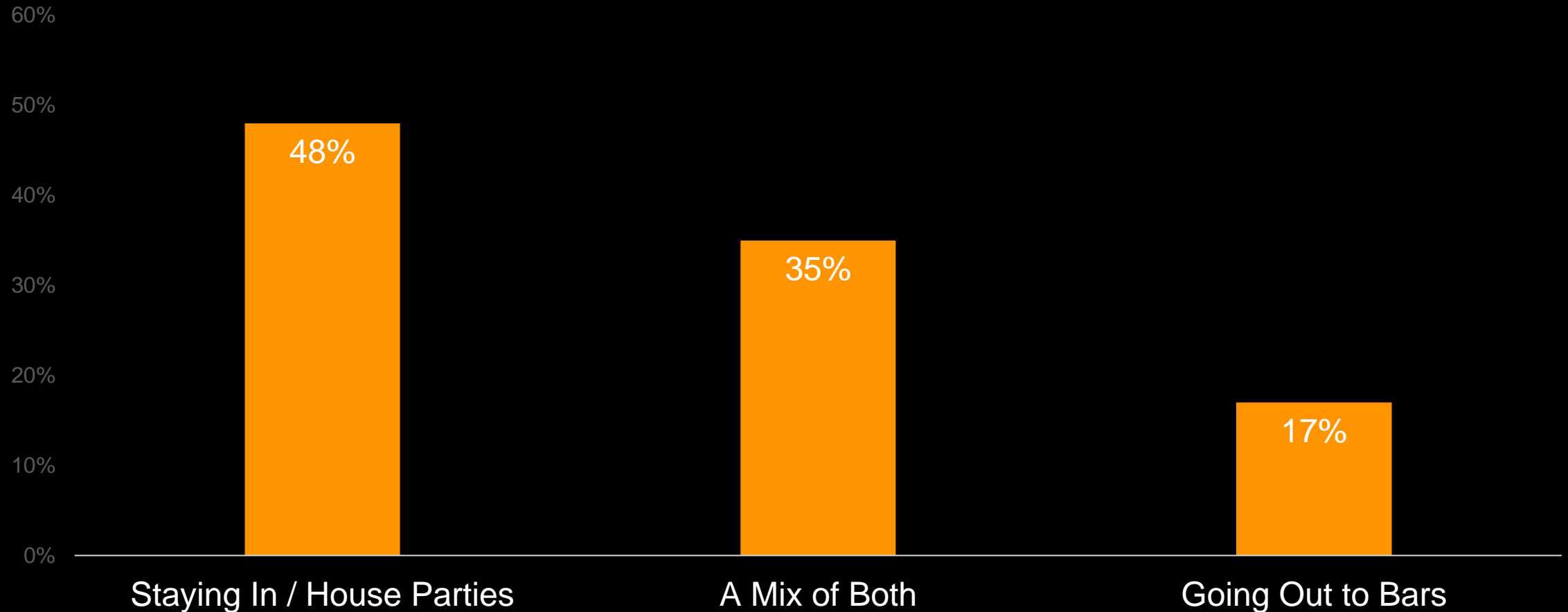
60%

“I’ll miss the creative side of entertaining in small circles post COVID”

59%

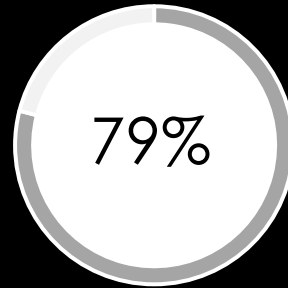
GLAM HOMEBODIES

A *new* ideal social mix

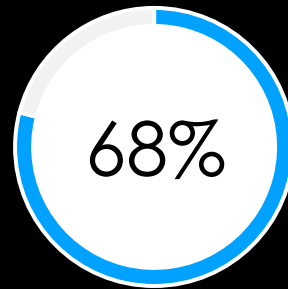


GLAM HOMEBODIES

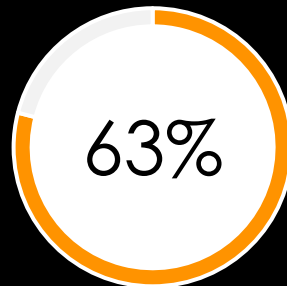
The infrastructure of the home is changing – and it's here to stay



spent the same or more money on telecom services this past year



started making more home cooked meals



made home improvements
(57% of parents say they would make improvements to their home in order to prepare for something like this in the future)

TREND

11

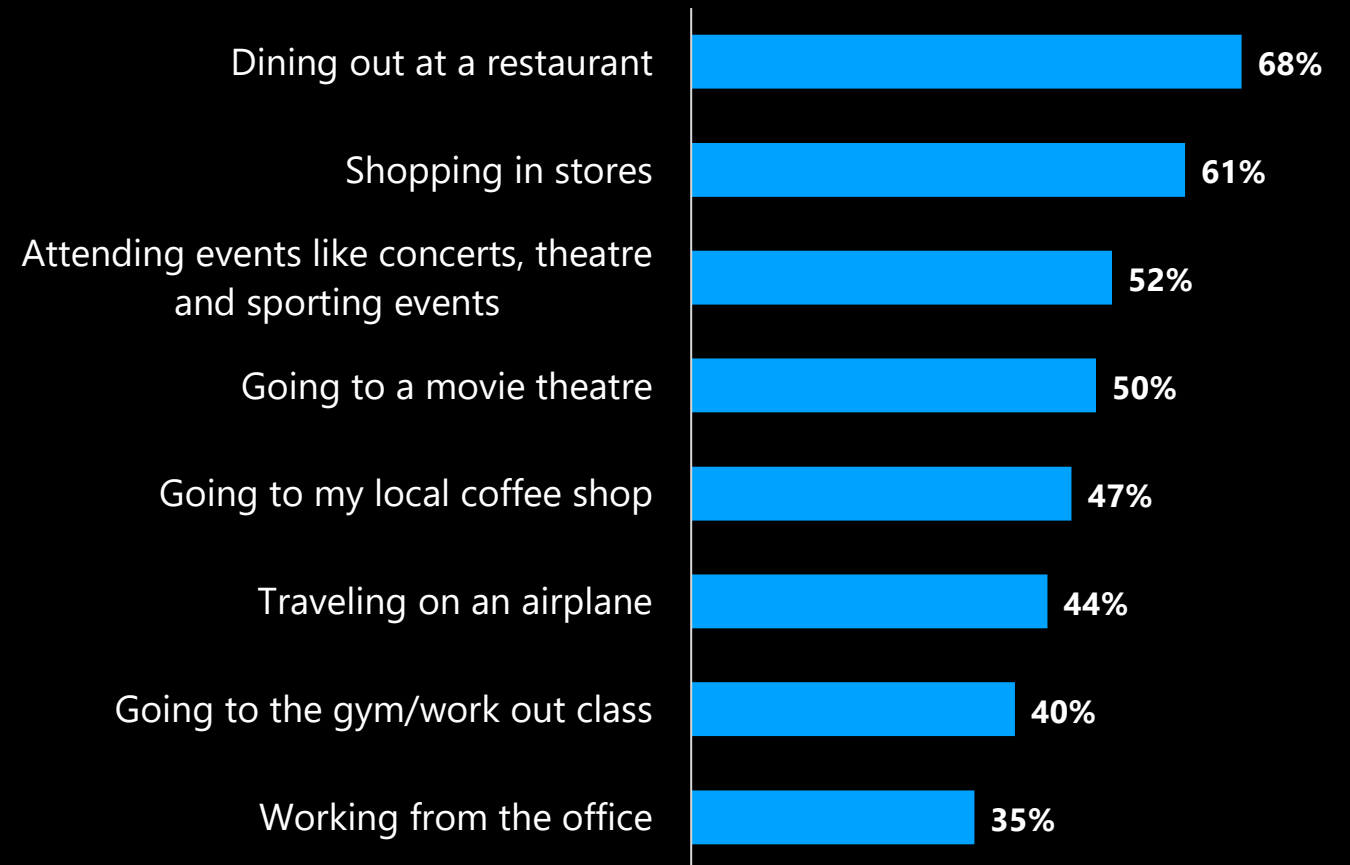
TRAVEL BOUND

Being confined indoors for over a year ignited a new wave of outdoor enthusiasts, but a renewed return to travel will test its staying power

TRAVEL BOUND

Consumers have missed being out and about during COVID, and are ready to get back to spending

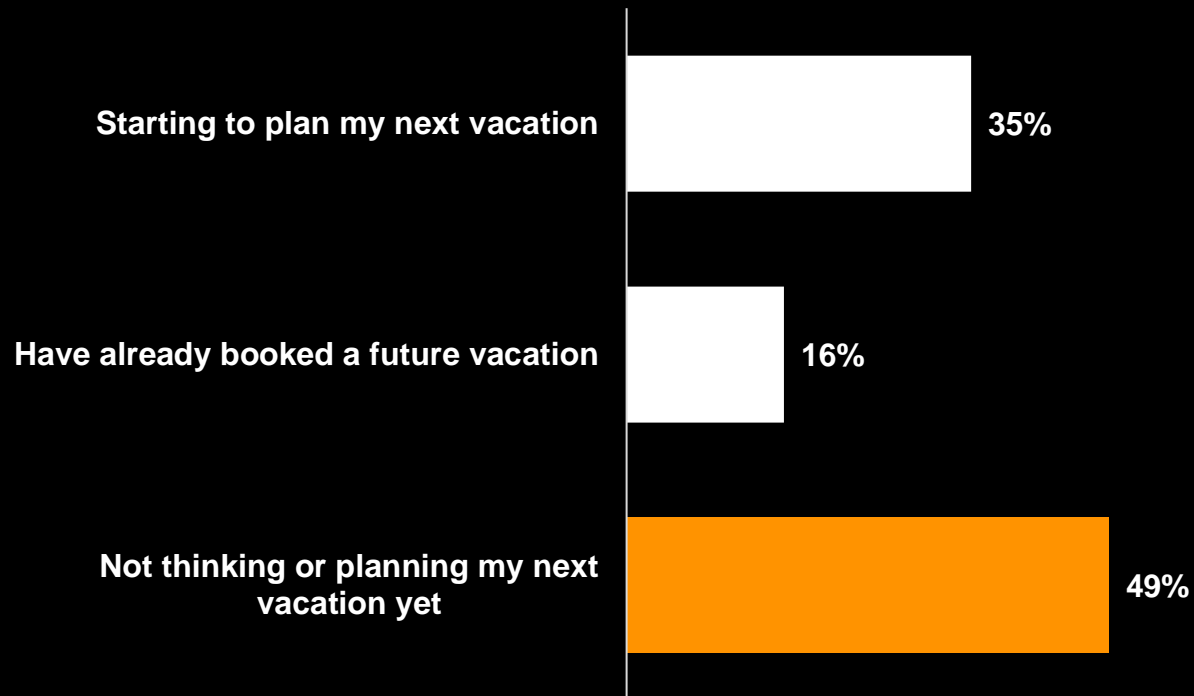
Consumers have missed...



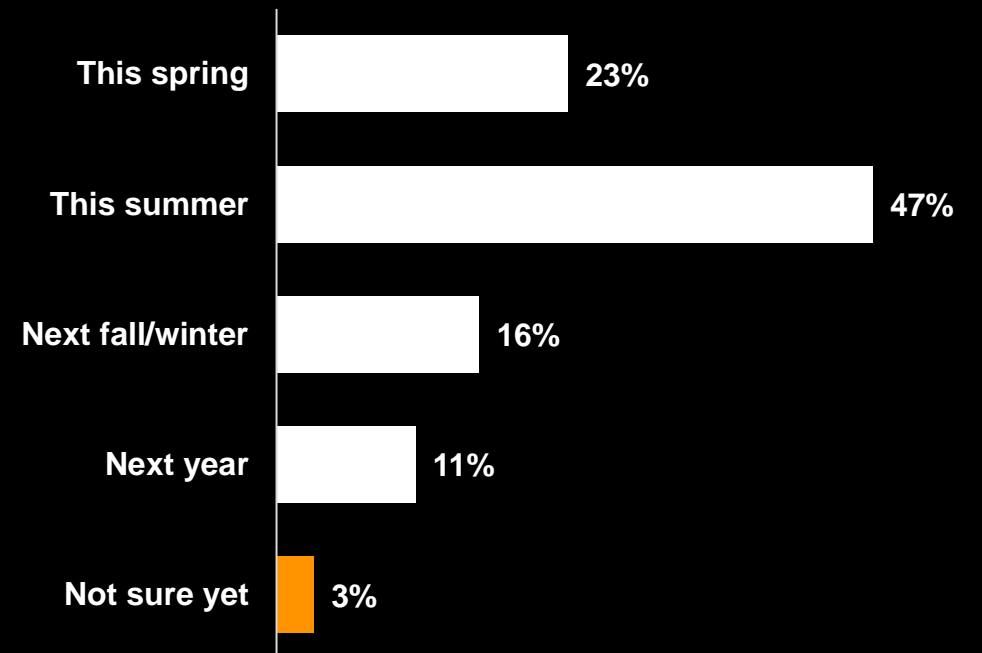
TRAVEL BOUND

HALF OF AMERICANS ARE PLANNING A VACATION FOR THIS SUMMER

At this time, which of the following are you doing/have done?



When are you planning to take your next vacation?



TREND

12

REPUTATION, REVIVED

Reputation Returns As Most Important Intangible Asset; Character is The Catalyst to Growth and Wider Influence in Society.



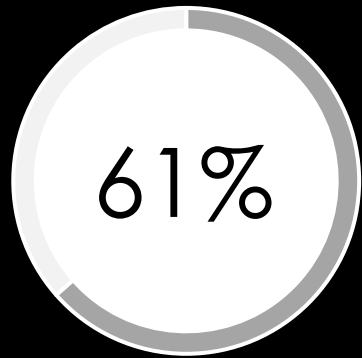
REPUTATION, REVIVED

The reputation of the pharmaceutical industry has doubled during the pandemic, from **32%** to **62%**

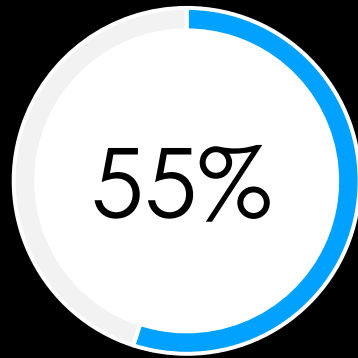
- In our Essential 100 ranking from June 2020, we Johnson & Johnson ranked #3, and Pfizer ranked #8
- Nearly every sector has seen a reputation bump in the last year

REPUTATION, REVIVED

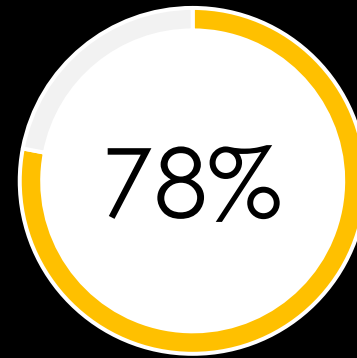
Corporate America's leadership is more important than ever



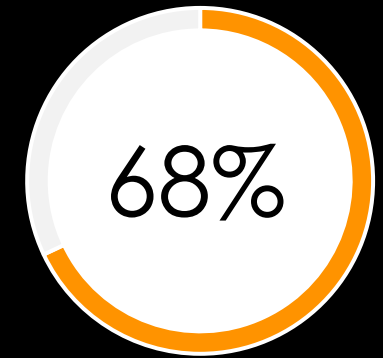
say **companies were more reliable than the government** in keeping the country running during COVID



trust companies more than the government to **find solutions**



say **large companies are even more vital** to the country's future than before COVID

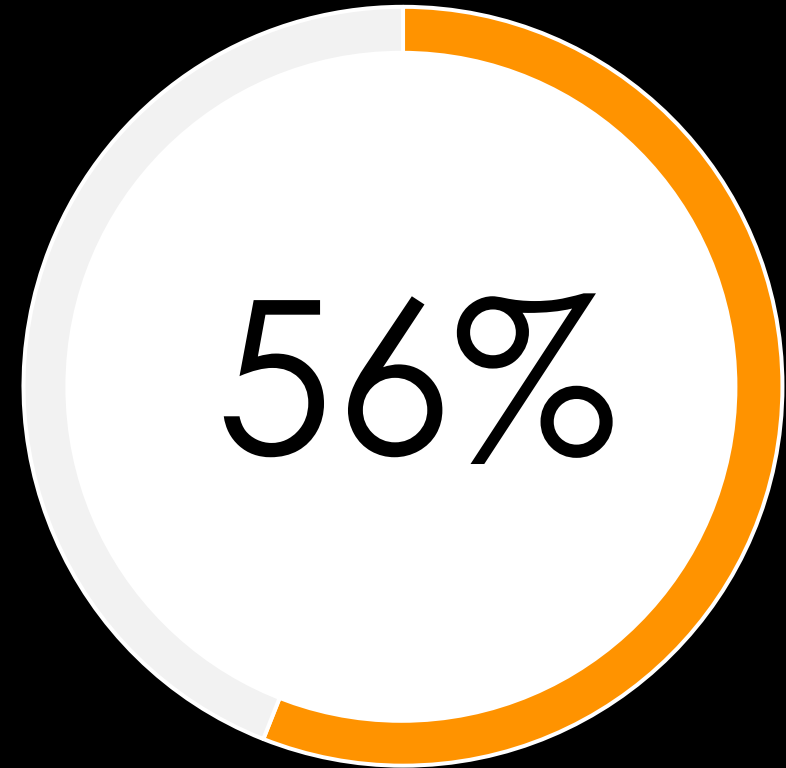


say **America needs business leaders now more than ever** to help lead responses to the pandemic, racial justice, and other inequities

REPUTATION, REVIVED

The CEO has the most impact on:

- The reputation of the company (85%)
- Ethical standards (84%)
- Diversity and Inclusion (79%)
- Stock price (75%)



Over half of Americans have changed their buying habits based on a CEO's actions

THANK YOU

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 **The Harris Poll**
Harris Insights & Analytics, A Stagwell LLC Company

Find the full report at:
<https://theharrispoll.com/the-great-awakening/>

