

COVID-19 CONSUMER RESEARCH WAVE 35 EXECUTIVE SUMMARY

November 11 - 13, 2020

MDC and **The Harris Poll** have partnered to conduct research to monitor the pulse of the American Consumer.

The executive summaries on the pages that follow provide insight into current consumer attitudes and behavior and can be used to help navigate the changing industry landscape. We hope this information proves useful to you and your team as you address these changes in real time and strategize for your next moves.

As always, we are here to help. Please don't hesitate to contact us with any questions you may have.

Positively,

Ryan Linder + The MDC Family
Global Chief Marketing Officer, EVP



WAVE 35

WAVE 35 INTRODUCTION

The following research was conducted between **November 11-13, 2020** by The Harris Poll. Fielded among a nationally representative sample of **1,963** U.S adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

HARRIS POLL CHAIRMAN, MARK PENN IN WSJ: “AMERICA’S SHOCKINGLY MODERATE ELECTORATE”

Introduction:

Mark Penn, Chairman of The Harris Poll, [wrote on Monday for the Wall Street Journal](#) that the 2020 election results were close and split because voters rejected radical changes:

- “We are one country divided by two parties. **The nation is largely moderate, practical and driven by common sense over ideology. Most voters prefer compromise on health care, immigration, stimulus and other thorny issues that the extremes of the parties have pushed to the limits.** Only 24% of voters identify as liberal, while 38% say they’re conservative, according to CNN exit polls. Another 38% are moderate.”
- “Mr. Biden won almost all the liberals and Mr. Trump the conservatives. But Mr. Biden expanded the Democratic lead among moderates to 30 points from 12 in 2016—the single most significant change. **Moderate men swung the race to Mr. Biden.**”

- “Any race decided by such small margins could have been won by either side. Mr. Trump failed to improve his character or tone down his rhetoric, and he ran without developing a clear second-term agenda. [...] The Biden campaign focused on character, but if character outweighed issues, Mr. Trump would have lost by 20 points. Democrats did win on the virus, which was voters’ No. 2 issue, and that’s likely what put Mr. Biden over the top. **Voters made the rather sensible determination that while Mr. Trump might have done a good job with the economy, he did a bad one with the virus.**”

Section:

02

Topic:

AMERICANS EMBRACE REMOTE WORK; MORNING BREW X HARRIS POLL

Introduction:

This week, in partnership with Morning Brew, a new Harris Poll found the increase in remote working has helped Americans live a more healthy lifestyle. Here's what we found:

- Two-thirds (67%) of remote workers say their **lifestyle has gotten healthier** since working from home; 41% say they've been **eating healthier snacks** throughout the day and 38% say they've been **taking time to cook their meals**.
- **What else is healthier? Work relationships:** Around 2 in 5 remote workers (41%) say **communication with their manager is more effective** since working remotely. What's more is when asked what they **don't miss about the office**, nearly a third (29%) say the **office gossip** and 26% say **distractions** such as over-hearing co-workers on the phone.
- Remote workers are also enjoying a more **flexible routine**. In fact, if they could split their time between working in an office setting and a remote work setting, Americans would choose to do 2 days in an office setting and 3 days in a remote work setting, on average.

- **What would Americans miss if/when they go back to the office?** The top three things employed Americans said they'd miss about working remotely, if they had to return to an office, were: saving money by spending less on gas and lunches each week (41%), extra time in the mornings (40%) and being at home with their family (39%).
- While remote workers are finding their groove in the #WFH lifestyle (that seems to have no end in sight) **there are some aspects employees like about the office setting that they can't get at home, such as** in-office socializing (31%), their desk setup (28%) and in-person meetings (24%).

Implication:

Employers are not off the hook: they need to think strategically about how to create a fulfilling work life without the convenience of the office and also be ready to accommodate new demands if/when they return.

Section:

03

Topic:

GET READY TO VERIFY YOUR VACCINE

Introduction:

Last week, we got a glimpse of what events with big crowds - one of the final indicators we've returned to some kind of 'normal' - may look like in 2021: [Billboard profiles](#) Ticketmaster's new system in which fans will need to validate their vaccination status or a recent negative test using its app before accessing their ticket.

- **However, vaccine validation may not be enough to get Americans back into seats.** Only half (50%) of Americans say they'd feel safe attending a concert or sporting event with such a system, while 64% say they'd feel safe enough to go back to the office, and 57% to attend a work conference.
- **"Play Freebird"**: more than one-quarter (27%) plan to attend a concert or sporting event (up from 18% in April) as soon as we return to normal, with Gen X (33%, vs. 23% of Boomers) the most likely to head to the arena.
- Axios says [Ticketmaster's plan to require a digital health pass for concertgoers might be a model for airlines.](#)
- **Test Like a Champion Today**: if you watched Notre Dame students rush the field after toppling #1 Clemson the other week and thought crowded stadiums were already back, you likely weren't alone. [Now, the university is ordering all students to be tested for the virus](#) or they will not be able to register for the spring semester.

Implication:

The efficacy of a vaccine validation system for public events will hinge on vaccine distribution, a looming puzzle we have yet to solve. Meaning businesses will have to continue planning for uncertainty in the immediate and near term where being agile and innovative is critical in order to reach customers across ever-changing touch-points.

Section:

04

Topic:

COLLEGE ATHLETE ENDORSEMENT PAY GETS MILD PUBLIC SUPPORT; SPORTICO X HARRIS POLL

Introduction:

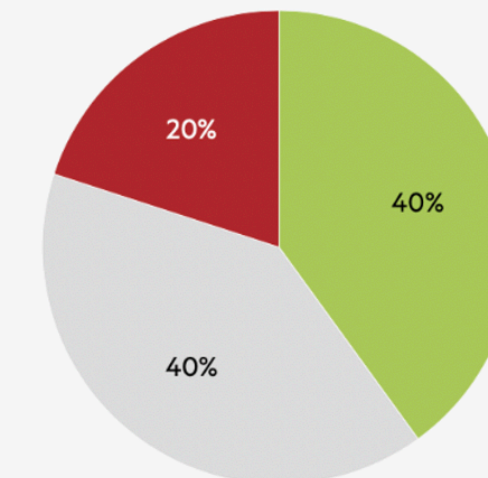
Student athlete endorsements in some form will be coming to college sports soon and the public approves. [Last week, in partnership with Sportico, a new Harris Poll](#) found the public supports college athletes being able to profit from their Name, Image, and Likeness (NIL), with support even higher among sports fans.

- **Support for college athletes being able to earn money from their NIL is significant from college sports fans as a whole (70%),** but highest among men's basketball fans (75%). The general public is less in favor (62%).

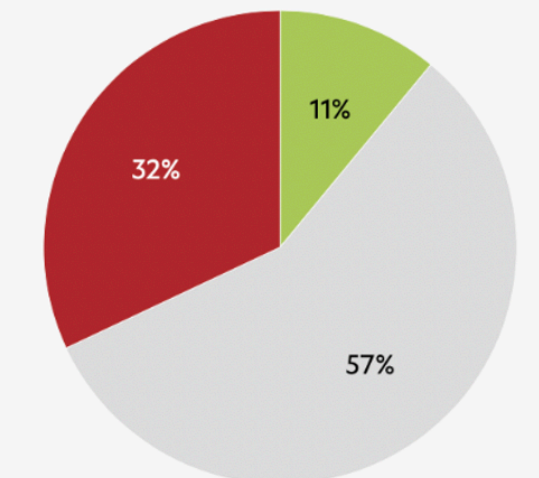
- **Survey Says:** The NCAA has argued in court that athletes being able to profit from endorsements will reduce fans' enjoyment of college sports, in turn harming the schools and the teams. **According to our survey results, most college sports fans say that it would either enhance (28%) or not change (47%) how they enjoy college sports.** More than one-third (37%) of women's college sports fans, in particular, say that it would enhance their enjoyment.
- **Most people support some restrictions on player endorsements:** three-quarters (75%) of college sports fans (and 70% of the general public) say that players should be prohibited from endorsing certain types of companies, such as sports gambling businesses, despite the fact that universities themselves have recently begun to partner with such organizations.

Few Fans Say Athlete Endorsements Would Reduce Their Enjoyment of College Sports

Legend:
■ Would Enhance Enjoyment
■ Would Not Change Enjoyment
■ Would Reduce Enjoyment



Fans Who Follow a College Sport "Very Closely"



Fans Who Follow a College Sport "Somewhat Closely" But Not "Very Closely"

Full question: "How would NCAA college athletes being allowed to profit off their name, image, and likeness change how you enjoy college sports?"

Chart: Lev Akabas • Source: Harris Poll / Sportico

Implication:

Will college sports be a new opportunity for marketers? [Sports Illustrated tells how](#) "UNC has created a new branding initiative, Blueprint 919, to provide football student-athletes resources to understand and navigate potential opportunities" and is partnering with a brand marketing expert to help athletes "to develop and grow their personal brands."

Section:

05

Topic:

COVID IS NOT THE ONLY THING KEEPING AMERICANS OUT OF MOVIE THEATERS; YAHOO FINANCE X HARRIS POLL

Introduction:

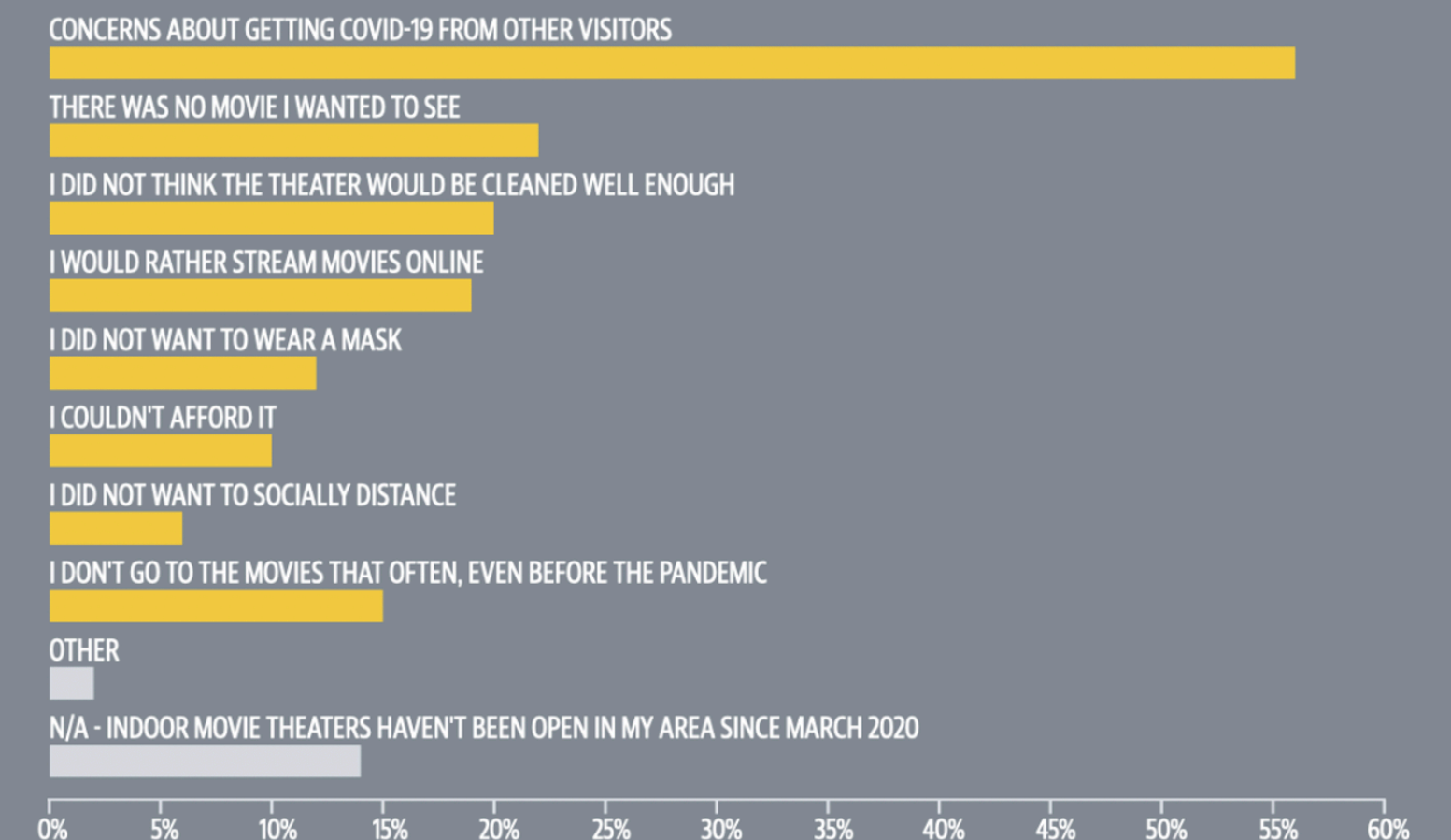
Pfizer's positive news about its experimental COVID-19 vaccine on Monday morning sent in-person entertainment stocks surging, including movie theater names like AMC and Cinemark. But for the movie theater industry, the end of the pandemic won't necessarily prompt an immediate return to boom times. [A recent Harris Poll for Yahoo Finance](#) finds that COVID-19 concerns are not the only factor keeping Americans from returning to movie theaters.

- **More than half (56%) say they have not been to the movies since March because of concern of getting COVID-19 from other visitors**, while 20% say they worry the theater wouldn't be cleaned well, and 12% say they don't want to wear a mask.

- **And the pandemic has made Americans more reluctant to go to a theater next year:** 33% of those surveyed said they expect to go to movie theaters less often in 2021 than they did in 2019.
- Among those who haven't gone to a theater since before the pandemic, half (53%) said a COVID-19 vaccine would make them feel more comfortable.
- **The Blockbuster-less Year:** Just under one-quarter (22%) say there has not been a movie they wanted to go see, while 19% say they'd rather stream a movie. Which shouldn't be of much surprise, given highly anticipated blockbusters like [Dune and Black Widow have been delayed until late 2021](#) in hopes people will be able to return en masse by then.
- **The Streaming Wars:** Among those reluctant to go to a movie theater in 2021, 31% say it is cheaper to watch movies at home and 25% say it is because fewer movies are being shown in theaters now.

WHAT'S KEEPING AMERICANS OUT OF MOVIE THEATERS?

If indoor movie theaters have re-opened in your area, why haven't you visited one since March 2020?



SOURCE: HARRIS POLL OF 672 US ADULTS CONDUCTED NOV 6-9, 2020

yahoo/finance
The Harris Poll

Section:

05

Implication:

Movie studios are driving the trend away from movie theaters and to the home screen by postponing or skipping theatrical release, a practice that accelerated during the pandemic when theaters were closed, but is now expected to continue even beyond the pandemic. And some movie studios are quickly adapting: [on Monday, Universal Pictures](#) “struck another deal [...] to shorten the theatrical window from three months to as little as 17 days in an effort to adapt to the new business realities of moviegoing.”

Questions?

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