

# COVID-19 CONSUMER RESEARCH WAVE 37 EXECUTIVE SUMMARY

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November 30 - December 2, 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 37

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## WAVE 37 INTRODUCTION

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The following research was conducted between **November 30 - December 2, 2020** by The Harris Poll. Fielded among a nationally representative sample of **1,980** U.S adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.



Section:

# 01

Topic:

## VACCINE SKEPTICISM

Introduction:

Though it seems impossible, [Dr. Fauci said this week people could be catching a Broadway show by the end of next summer](#) if enough of the public - 75 to 85% - are vaccinated against COVID-19. In our tracking, we are still short of that amount, with only (59%) of the public saying they are likely to receive the vaccine. What could instill more confidence in a skeptical American public?

- Fear of the unknown: of those who say they are not likely, **more than three-fifths (63%) say they are worried about unknown side effects**, (43%) say they do not trust the vaccine to prevent them from getting COVID, and (19%) will not receive any vaccinations. **And 78% of the general public is concerned about potential side effects** of the vaccine.
- Who will instill public confidence? **Nearly one-quarter (23%) of those not likely to get the vaccine say they would be more likely to get it if Dr. Fauci publicly gets it**, while only 13% are more likely if President Trump received it, 18% if President-Elect Biden receives it, and 20% if former President Obama does. **But presidents are not the only ones who can help win over a skeptical American public**: 11% say they would be more likely to if LeBron James gets it and 15% if Tom Hanks does.
- Former Presidents Bill Clinton, George W. Bush, and Barack Obama [announced this week they will publicly receive the vaccination on camera in order to boost public confidence in its safety](#).

Implication:

What can behavioral science teach us about nudging Americans to take the vaccine? [The Economist](#) put its best: **"First, we need to persuade people** who aren't ideologically opposed to vaccines to get a jab. Second, we need to ensure that people willing to roll up their shirt-sleeve **actually follow through.**"



Section:

# 02

**Topic:**

## WHAT THANKSGIVING MEANS FOR THE WINTER HOLIDAYS

**Introduction:**

Americans have been looking at the back-to-back-to-back winter holiday season with alarm and fear since the start of the COVID-19 pandemic and we are now in the middle of it. As we wait to see the full impact of Thanksgiving travel, what will the seemingly inevitable surge in cases mean for upcoming holidays?

- Americans are **evenly split on whether they will wait to see the impact of Thanksgiving travel on COVID-19 cases before making plans for the winter holidays** (51%) or not (49%).
- **The wait and see approach:** Two-thirds (66%) of Americans say they are less likely to have an in-person gathering for the upcoming winter holidays if COVID-19 cases rise as a result of Thanksgiving, with Seniors (73%) and Boomers (69%) being more cautious than Gen Xers (57%).
- **Thanksgiving regrets are personal:** more than three-fifths (62%) of those who gathered with others in-person for Thanksgiving say they **will have regrets if someone they know caught COVID-19 at their gathering**, while only (43%) say they would have regrets if there is a general spike in cases as a result of Thanksgiving.
- [The Washington Post explains](#) “why health officials are terrified of a pandemic Christmas.”

**Implication:**

Millions of Americans hedged their bet on celebrating Thanksgiving in-person and the consequences may not be fully apparent until Christmas, Hanukkah, and New Year's are here, causing millions to suddenly change travel plans or accelerate the pandemic even further.



Section:

# 03

Topic:

## BLACK FRIDAY IS NOW ONLINE

Introduction:

What did Black Friday in 2020 look like? We checked in with Americans to see how they kicked off the holiday shopping season during the pandemic:

- **Cyber Black Friday:** One-third (33%) of Americans shopped on Black Friday last week and another (12%) shopped for holiday gifts at some other point that week, **while nearly all (89%) did so at least partly online** (44% only online, 45% both in-store and online).
- **Pandemic Spending:** Three-quarters (76%) spent more than \$100 on Black Friday shopping this year, and one-quarter (26%) spent more than \$500.
- **What were Americans shopping for?** One-third (33%) bought home goods like bedding and furniture; (31%) video games, (31%) new personal tech, (29%) kitchen and dining products, (27%) smart home devices), and (26%) computers or tablets.
- **Black Friday looked different during a pandemic:** with sales spread throughout the week and a heavier emphasis on Cyber Monday, [USA Today says Black Friday itself was the “quietest in 20 years”](#) while online sales soared.

Implication:

The fortunate Americans who are financially able to spend on the holiday season will continue to do so, but their typical holiday shopping and travel patterns will continue to adjust for the times.



Section:

# 04

Topic:

## CHARITABLE GIVING IN THE TIME OF COVID

Introduction:

Coming off of the heels of the most unprecedented GivingTuesday yet, where giving [increased 25% from last year in the U.S. alone](#), we took a deeper look at how the pandemic is reshaping how Americans approach charitable giving and what they expect of business.

- **The pandemic has made some Americans more interested in supporting charitable organizations:** this was especially true for higher income households \$100k+ (47%), Gen Z/Millennials 18-34 (40%) and adults 35-49 (45%) compared to (35%) of the general public.
- **Small gains with long-term impact:** While only nearly a fifth (18%) donated to a new charitable organization during COVID, nearly three-quarters (73%) of those people say they will continue to support the cause in the future.
- **Giving back is good for business:** (86%) say they would have a more positive view of companies who give back to charities and (58%) say they are more likely to buy from a company who gives back to charity. See what [Everlane](#) has done by donating profits from special sales and collections to charitable causes, and [Minted](#) by creating Notes of Gratitude collection that benefits World Central Kitchen, a nonprofit organization that supports local restaurants and communities.
- **Gen Z women are mobilizing support in their communities:** In our [joint-survey with the United Nations Foundation Girl Up](#), we found that Gen Z women are taking action to address COVID-19, 59% are engaging family/friends **how to stay safe**, 28% **helped an older friend/neighbor in need**, 27% took part in **social media activism** to drive awareness of COVID and 14% **volunteered**. Overall, 70% of Gen Z Women have done some form of **public activism** recently vs 62% of Gen Z Men.

Implication:

GivingTuesday showed us what we are capable of and how much more we can do and the rising demand for business to follow suit... In a single day, GivingTuesday donors in the United States gave \$2.47 billion, an amount that is more than all but one U.S. philanthropic foundation gave in a full year during 2019.



Section:

# 05

Topic:

## HARRIS POLL CEO WILL JOHNSON IN CRAIN'S CHICAGO BUSINESS: “EMERGING OPTIMISM FOR 2021”

Introduction:

Harris Poll CEO, Will Johnson [wrote an op-ed on Tuesday for Crain's Chicago Business](#) about the exclusive Chicago Executive Pulse survey, conducted in partnership with Crain's and The Harris Poll, showing Chicago-area execs are starting to see light at the end of the tunnel.

- The survey, conducted among over 200 area business leaders (owners, C-suite executives, vice presidents and directors) found local **executive expectations remain positive** with (44%) reporting **Chicago's economy will be in good** or very good condition in six months, and (48%) saying the same of the broader U.S. economy.

- The majority of Chicago executives expect that the Biden administration will positively affect **job growth** (57% as opposed to only 22% who think it will have a negative effect) and **reopening the economy** (55% as opposed to 31% who disagree).
- Strong pluralities of Chicago-area business leaders are also optimistic about the new administration's effect on **public market performance** (48% positive versus 27% negative), **trade relations** (48-24), **intellectual property protection** (49-20) and **health care** (46-23).
- A greater number of business leaders reported **rising** (47%) or **stable** (32%) **revenues** over the last month. Nevertheless, roughly the same number of leaders now say that **business conditions have deteriorated** over the last month as in August (55%, down from 57%).

Implication:

The unmistakable momentum of positive expectations is checked by a still-rising pandemic, but as conditions improve, with the help of three promising vaccine candidates, it will build a tension and then a torrent. The next year could see a fast-developing, explosive change—that marks a long-sought return to normalcy.



# Questions?

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**KNOWLEDGE IS POWER**

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