

COVID-19 CONSUMER RESEARCH WAVE 41 EXECUTIVE SUMMARY

January 8 - 10, 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 41

WAVE 41 INTRODUCTION

The following research was conducted between **January 8-10, 2020** by The Harris Poll. Fielded among a nationally representative sample of **1,951** U.S adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

TWITTER'S TRUMP BAN AFTER DEADLY CAPITOL ATTACK SUPPORTED BY MOST AMERICANS BUT NOT MOST REPUBLICANS: USA TODAY-HARRIS POLL

Introduction:

Most Americans, but not most Republicans, support Twitter's permanent suspension of President Donald Trump after the deadly U.S. Capitol siege, according to our latest survey shared exclusively with [USA TODAY](#).

- A majority of Americans (61%) said they **agreed with Twitter's decision to ban Trump** over the risk the president would use the platform to incite further violence, while 39% opposed it.
- But in a vivid representation of the nation's **raw divisions**, opinions split along partisan lines, with 36% of Republicans supporting the ban versus 80% of Democrats and 59% of Independents.
- The removal of Trump's Twitter account has **sparked censorship concerns** among Republicans. More than a third of Americans (36%) said they were concerned about censorship, including 63% of Republicans and 20% of Democrats. And 4 in 10 (42%) also agreed with the statement "I am concerned that Twitter permanently suspending President Trump sets a dangerous precedent with technology companies censoring free speech and government officials."
- On the other hand, 69% said social media companies should be able to remove users they consider dangerous, even if it's the president of the United States. And 40% say Trump should have been banned earlier and described **Twitter's removal as "too little, too late."**

Implication:

"Americans were outraged by what they saw at the Capitol last week, and they're looking for leadership from the business community. In the absence of action from political leaders, they see a Twitter ban as a reasonable step -- and one that will hopefully prevent future dangerous situations." - Harris Poll CEO, John Gerzema

Section:

02

Topic:

BIDEN CAMPAIGN POLICIES ON BRANDS; CAMPAIGN US WEBINAR

Introduction:

On Tuesday, Harris Poll's Tawny Saez, Director and Cultural Anthropologist, joined Campaign US [Virtual Brunch Briefing](#) to discuss how President-Elect Biden's policies could impact brands, agencies and media owners based on Harris' latest polling data. Here are some of the highlights:

- **A majority are optimistic** about how Biden will address COVID (63%), the economy (59%), and racial inequality (58%). Meanwhile, optimism is divided **across the aisle**; democrats are more than 2x likely to be optimistic across all issues.
- Americans are calling on Biden to enact **stronger government intervention to address COVID** compared to the previous administrations' approach that left states to fight the pandemic largely alone. This includes drastic enforcements such as mask mandates (75%), COVID testing (73%), bans on gatherings (66%) and even mandating people to get the vaccine (56%).
- Americans have most confidence in Biden's ability to **distribute the vaccine rapidly** (64%), which is critical as 32% are skeptical of getting the vaccine, especially BIPOC (45% Black; 38% Hispanic; 31% Asian vs 29% White).
- The majority are **hopeful Biden will heal deep cultural divides** (59%), but we are living in a divided world where outlook is tied to party affiliation; there is 40-point gap of optimism between democrats (62%) and republicans (16%) and a 27-point gap of hopelessness between Republicans (33%) and Democrats (6%).

- **Now is the time for brands to act, and consumers say they will remember:** 72% say "I will remember the companies that took missteps in their response to the issues related to the COVID-19 pandemic, economic security of their workforce, or racial injustice long after this is over." But they are giving companies an opportunity; while 82% say "This is an **opportunity for large companies to hit the "reset" button and focus on doing right** by their workers, customers, community and the environment."

Implication:

Americans are optimistic about the incoming Biden Administration, but a lack of transparency from leadership to-date has seeded mistrust, skepticism and division. To stay relevant, brands will need to adopt new forms of communication that speak to diverse consumer values that engender trust through accountability and action.

Section:

03

Topic:

WE'VE GOT A LONG WAY TO GO

Introduction:

This week, we looked at where consumer sentiment is at this stage in the pandemic by asking Americans how comfortable they currently are to do activities that were part of everyday life before the pandemic. What did we find? We still have a long way to go until Americans are comfortable enough to live a normal life.

- **At the moment, Americans are not comfortable socializing:** 62% are not at all comfortable attending a large sporting event or concert, while 56% are not comfortable going to an indoor party, 43% are not comfortable going out to dinner or drinks indoors; and 38% are not comfortable visiting friends or family without a mask.
- **And a return to normal will rely on comfort in the customer journey, which we are still a long way away from:** 56% are not at all comfortable shopping in a store without a mask, 55% are not comfortable flying on a plane, 55% are not comfortable taking public transportation, and 43% are not comfortable staying in a hotel.
- **But there is some optimism:** 4 in 10 (43%) are confident we will reach herd immunity and “return to normal” sometime in the summer 2021. Younger Americans (50% of Gen Z/Millennials and 52% of Gen X) are the most optimistic about a return to normal, while 35% of Boomers and 31% are not so confident.
- And as COVID now rampages through much of rural America, it is **Urbanites (54%) who are most optimistic about a return to normal this summer** (vs. 36% of Rural Americans and 37% of Suburbanites).

Implication:

Even as [Dr. Fauci assured people last week that the end is in sight](#) and crowded events can return “sometime in the fall of 2021”, the overwhelming majority of Americans are still hunkering down as we brace for what is to come (66% say the worst is still ahead of us). To make consumers feel more comfortable, brands will need to stay ahead of consumer expectations, such as [Uber who is partnering with Moderna](#) to build ride scheduling into vaccine appointments.

Section:

04

Topic:

MOST AMERICANS PLAN TO USE TELEHEALTH AFTER THE PANDEMIC: MEDCITY NEWS-HARRIS POLL

Introduction:

One of the biggest questions of COVID seems to be, what aspects of American life are changed forever? When it comes to healthcare, it looks like some new virtual habits adopted during the pandemic might be here to stay; 65% of people plan to continue to use telehealth after the pandemic ends according to our latest survey covered exclusively by [MedCity News](#).

- **Expect a hybrid of telehealth and in-person care:** If given the option between a telehealth visit or an in-person visit, 42% would choose a combination of in-person and virtual care. Most people (44%) still preferred in-person visits, and relatively few respondents (15%) said they would opt for telehealth services alone.

- **Age matters:** Half of people ages 35-49 said they'd prefer a combination of both, while 66% of people ages 65 and up said they'd choose in-person visits.
- **Telehealth = convenience:** Most people wanted to use it to ask medical questions, including 62% of people over age 65. Other popular uses were for reviewing lab results and getting prescription refills.
- **But in person care is still important for sensitive matters:** Fewer people said they would use virtual visits for regular checkups, therapy or when their child is sick.
- Despite 76% of people saying they would miss in-person visits if their primary care physician moved mostly to telehealth, half of respondents under age 50 said they would **consider replacing primary care with doctors on demand via telehealth**. And even 35% of the general population said they would consider this if they could access most of their regular appointments via telehealth.

Implication:

The pandemic has served as an accelerant to shifts that were already happening and will continue – it's critical to be “touchless” ready across all channels – physical and digital. This is part of the larger rise of safety as a customer journey we're seeing; brands that find the right balance of touchless, yet with a human touch will definitely emerge as winners.

Section:

05

Topic:

THE PANDEMIC IS TAKING A TOLL ON CHILDREN'S MENTAL HEALTH

Introduction:

This week CEO Will Johnson co-wrote [an op-ed for Business Insider](#) based on a survey that found that while children are less likely to get COVID or experience severe symptoms, they have not been shielded from the effects of the pandemic.

- **School-aged children are socially isolated**, with only 16% of those 18 and younger having gone back to school this fall. On top of this disruption, 10% of them have had a COVID-19-related death in the family, 18% had a parent lose a job, and 45% had parents suffer a drop in income.
- Since COVID-19 hit, **mental illness symptoms have increased in school-aged children**. According to their parents, one in seven kids has been quick to anger, has trouble concentrating, and has low energy. This jumps even higher when considering households with incomes below \$50,000 per year to 40% of children displaying these symptoms.
- **Children are suffering:** Parents consider one in eight of their children's mental health (13%) as poor or fair today.
- However, **fewer parents say they're seeking mental health treatment** for their children or think treatments are effective. 1 in 10 (11%) children now have parents who say therapy is not very or not effective at all, and 10% have parents who say drug treatment is not very effective or doing no good at all.

Implication:

As Will stresses, “decision-makers need to recognize the impact of school closures on the well-being of our children and prioritize returning children to the classroom, to reduce the social isolation that surely is exacerbating children's mental health issues.”

Questions?

RYAN LINDER

Global Chief Marketing Officer, EVP, MDC Partners

rjlinder@mdc-partners.com

JOHN GERZEMA

CEO, The Harris Poll

jgerzema@harrisinsights.com



KNOWLEDGE IS POWER
