

COVID-19 CONSUMER RESEARCH WAVE 42 EXECUTIVE SUMMARY

January 15 - 17, 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 42

WAVE 42 INTRODUCTION

The following research was conducted between **January 15-17, 2020** by The Harris Poll. Fielded among a nationally representative sample of **1,960** U.S adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

PRESIDENT BIDEN SEES HIGH SUPPORT FOR INITIAL AGENDA

Introduction:

Today, Joe Biden was sworn in as the 46th President of the United States and has taken over trying to get America back to a semblance of normal. We asked Americans if they support or oppose key items in the new president's initial policy agenda and found that most Americans - including half or more of Republicans - support the policies.

Stimulus: Biden sees the highest support for (78%) providing \$175 billion in low-interest loans to small businesses, while (76%) support passing an additional \$1,400 stimulus checks. Three-quarters (75%) of Americans support expanding tax credits for low- and middle-income families, including 69% of Republicans vs. 83% of Democrats.

Protecting Americans: Just under three-quarters support extending the eviction and foreclosure moratorium (74%) and requiring all employers to offer paid sick leave until after the pandemic (72%).

Reopening schools: Over two-thirds (68%) support providing \$170 billion to help schools reopen in the pandemic, including 77% of Democrats and 63% of Republicans.

Two-thirds (66%) support raising the minimum wage to \$15 per hour and (65%) ending the lower minimum wage for tipped workers. Half (50%) of Republicans support raising the minimum wage, the lowest level of Republican support for any of these policies (vs. 82% of Democrats).

Implication:

[The Wall Street Journal details](#) what - and how - President Biden hopes to accomplish in his first 100 days. As they put it, Biden will take office "this week with a far-reaching set of plans for his first 100 days, but he must grapple with narrow Democratic majorities in Congress and an unsettled country as he seeks to roll back some of his Republican predecessor's policies and curb the pandemic."

Section:

02

Topic:

MARKETING IN THE MOMENT: AMERICA'S (FLUID) EXPECTATIONS FOR COMPANIES

Introduction:

As America faces the COVID-19 pandemic against the backdrop of social, economic, and political turmoil, marketers face communicating to divided and distraught consumers where authenticity, safety, and hope is now more important than ever.

Most Americans (77%) say it is important for brands to acknowledge COVID-19 in television and digital advertising - such as stressing the importance of masks and limiting social gatherings.

Consumers approve of COVID precautions, diversity, and unity in advertising: 57% say any **participants in an advertisement should be wearing masks** and socially distanced, and the same amount say, "advertisements should take extra care to portray actors who **represent diversity**." More than two-thirds (68%) say "messages should strive to **stress national unity and togetherness** where appropriate."

Americans want companies to take an active role in the vaccine rollout: 65% want to see companies advertise to encourage consumers to take the COVID-19 vaccine, while even more - 79% - say companies should be providing customers with reliable information about the vaccine.

Marketing in a Divided America - Peril and Promise: Four in 10 (42%) say brands should use their voice and advertising dollars to denounce misinformation and stress the importance of facts. Though what qualifies as "misinformation" may have a political lens: 54% of Democrats say brands should do this vs. only 29% of Republicans. Meanwhile, 54% of Republicans say "Companies should stay out of politics entirely and stick to only talking about their brand" vs. 24% of Democrats and 37% of all adults.

Brand Safety Now Takes On Heightened Risk After January 6th: 60% of consumers would **stop using a product after viewing the brand's advertisement next to false**, objectionable or inflammatory content (e.g., conspiracy theories/misinformation, political violence or extreme political views) and 51% would tell their friends to follow suit.

Implication:

Consumers are looking for leadership where the government has failed them: 66% say "Companies could do a better job than the government handling the logistics of administering the COVID-19 vaccine," and all companies have a unique role to play, and the time to act is now.

Section:

03

Topic:

HARRIS POLL AT CES 2021

Introduction:

At CES 2021, marketers gathered to discuss pandemic-related trends - and what to expect next. Harris Poll CEO John Gerzema spoke with Mastercard's Cheryl Guerin about recent joint-polling data on consumer behavior, which was covered in-depth by [Kathryn Lundstrom at AdWeek](#):

Touchless is here to stay: With 41% of global transactions being carried out using contactless tech, 74% of Americans say they plan to continue using contactless even after the pandemic is over, said EVP of North America Marketing and Communications for Mastercard, Cheryl Guerin.

A continued focus on health and wellness (The Betterment Boom): Looking ahead, Gerzema said polling data indicates that consumers, especially the younger cohort, are demanding a stronger focus on mental health within the wellness space. In fact, 82% of teens say, "It's time for Americans to talk more openly and honestly about mental health issues in this country" and across all American adults, 43% plan on being more connected to friends and family after the pandemic, 42% plan to be more active and 31% are going to change their career path.

Get ready for post-pandemic 'revenge spending': Guerin said that based on data from the recent poll, consumers are anxious to start spending on the things they've been denied over the last year—like travel, dining and in-person entertainment. More than half of American consumers have put away some money this year, Gerzema said, calling savings "the biggest enemy of consumption this past year." At this point, those savings are burning holes in the pockets of American consumers. "There's a savings dam that's about to burst," Gerzema said.

Calendar reshuffling will continue through 2021: Event cancellations were the name of the game in 2020 and continue to upend the cycles and seasonality of sports and business as in-person gatherings remain inadvisable for the time being. That's likely to continue throughout 2021, said Gerzema. "The implication here is: don't think in conventional timelines," said Gerzema. "Marketers need to be agile."

Implication:

COVID has upended how we work, play, discover, consume, and transact. But looking through the marketer's lens, we see that trends aren't being disrupted so much as they are accelerating in a direction anticipated pre-COVID.

Section:

04

Topic:

47% OF AMERICANS SAY VACCINATIONS ARE MOVING TOO SLOWLY: AXIOS-HARRIS POLL

Introduction:

Americans aren't thrilled with the vaccine rollout so far, [according to new Harris Poll data shared exclusively with Axios](#).

Just under half (47%) of Americans say the vaccine rollout is moving too slowly, with Democrats (52%) being more pessimistic than Republicans (41%). Only 27% **say it is going about right**, while 11% say it is moving too quickly.

Among those who feel it's going too slowly, there's a sharp partisan divide over who is at fault: **60% of Democrats say President Trump is to blame**, while a plurality of **Republicans (36%) say state governments** are the problem.

Some optimism: 69% of Americans say they are likely to take the COVID-19 vaccine, the highest percentage other than the first time we asked in April 2020 (when 73% said they would take the vaccine).

Among people who said they weren't likely to get vaccinated, some of the most common reasons included **fear of side effects (55%)**, **concerns about the fast development process (45%)** and **believing it won't work (36%)**.

Implication:

The Biden administration will take over right in the midst of one of the most complex and highest-stakes logistical efforts the country has ever seen — and getting it right will be both a political and public-health imperative.

Section:

05

Topic:

ACTUALLY, AMERICANS ARE FEELING BETTER THAN YOU THINK THIS WINTER: FAST COMPANY- HARRIS POLL

Introduction:

With so much bad news swirling around—COVID-19, politics, racial injustice—you'd think Americans would be throwing up their arms and gobbling down ice cream. [In an exclusive survey with Fast Company](#), we check in to see how Americans are feeling in the new year.

New year optimism: Three-quarters (75%) say they're feeling about the same or better in 2021 compared to how they felt previously during this time of year.

And people who normally contend with seasonal depression are twice as likely to say they're feeling better this year versus previous years - 32% compared to 16%.

Eight in 10 (79%) Americans report feeling their **sense of purpose in life is stronger than or about the same as this time last year** (though individuals with seasonal affective disorder were twice as likely to have weaker senses of purpose).

Since the start of the pandemic, The Harris Poll has been monitoring the various emotions Americans are experiencing: 70% feel thankful, 70% feel appreciative, and 66% feel compassionate while only 50% feel angry.

Implication:

In the article, happiness research Gillian Mandich reflects: "People are developing self-awareness and emotional intelligence, the ability to really reflect. Pre-COVID, for a lot of people, life was go-go-go. When the world shut down, people received this gift as a silver lining."

Questions?

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