

COVID-19 CONSUMER RESEARCH WAVE 52 EXECUTIVE SUMMARY

March 26 - 28, 2021

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 52

WAVE 52 INTRODUCTION

The following research was conducted between **March 26-28, 2021** by The Harris Poll. Fielded among a nationally representative sample of **1,989** U.S adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

COVID OUTLOOK - A TRENDED UPDATE

Introduction:

American outlook on COVID is becoming more optimistic with 62% saying “the worst of COVID is behind us” today (vs. 33% on December 30, 2020). Here’s what else is shifting across our year’s-worth of survey tracking data:

- **Approval of the vaccine roll out** is at an all-time high of 74% up from 52% when we first started tracking this sentiment on January 10th, as is **likelihood to take the vaccine** (75%) up from the lowest point of 54% on October 24, 2020.
- **Fear returning to public activity is down** 5 percentage points this week to 65%, marking a gradual decline since an all-time high of 76% on July 19, 2020. **Meanwhile the desire to return to normal is on the rise:** 50% miss traveling on an airplane (up from 24% on March 30, 2020).
- While optimism is rising, roughly 25% to 30% would **wait until the nation reaches herd immunity** to return to once normal activities such as eating indoors (23%), traveling on an airplane (27%), and attending a concert/ sporting event (32%) as featured in [USA Today](#).

Implication:

“The vaccine is certainly a game changer for getting back to doing the things we love, said John Gerzema, CEO of The Harris Poll. “But while it’s important that we each get our own shots, a significant number of Americans are patiently waiting for their friends and neighbors to get vaccinated before we truly see a return to normal.”

Section:

02

Topic:

THE ATLANTA MASS SHOOTINGS...WE SAW THIS COMING

Introduction:

For the past year, The Harris Poll has been tracking awareness and concern about the surge in hate crimes against Asian Americans, and today our data finally shows a shift in public awareness and concern.

- Over two thirds (67%) of the public and 74% of Asian Americans believe that the Atlanta shootings were a **turning point** in the conversation around discrimination towards Asian Americans.
- **Rise in Concern:** Last year, less than 6 in 10 (59%) of Americans were concerned about the hate towards Asian Americans related to the pandemic. Now, over three quarters (76%) are concerned, including 82% of Asian Americans.
- **A Community in Pain:** Nearly 7 in 10 Asian Americans (69%) are worried about their family being physically or verbally attacked due to the anti-Asian hate and nearly 3 in 10 (29%) mentioned they would be less vocal because of fear.
- **A Community That Will Not be Silenced:** Two-thirds (64%) of Asian Americans said the recent attacks have made them want to become more vocal against racism and 65% stated they needed to organize protests to bring more awareness to these injustices to racial minorities. Last weekend the AAPI community along with Americans of all races and colors participated in [rallies](#) across the U.S. to condemn attacks against Asian Americans and Pacific Islanders.

- [In a separate poll we conducted with the National Asian Pacific American Women's Forum \(NAPAWF\)](#), we look at details how Asian American/Pacific Islander (AAPI) women have been significantly affected by anti-Asian racism and xenophobia in the United States in a survey conducted before the tragedy in Atlanta.

Implication:

We will be looking deeper into this divide in our nation as part of our [#wassthehate](#) series in the COVID-19 Tracker.

Section:

03

Topic:

MEET THE MIDDLE-AGED MILLENNIAL: HOMEOWNER, DEBT-BURDENED AND TURNING 40: CNBC-HARRIS POLL

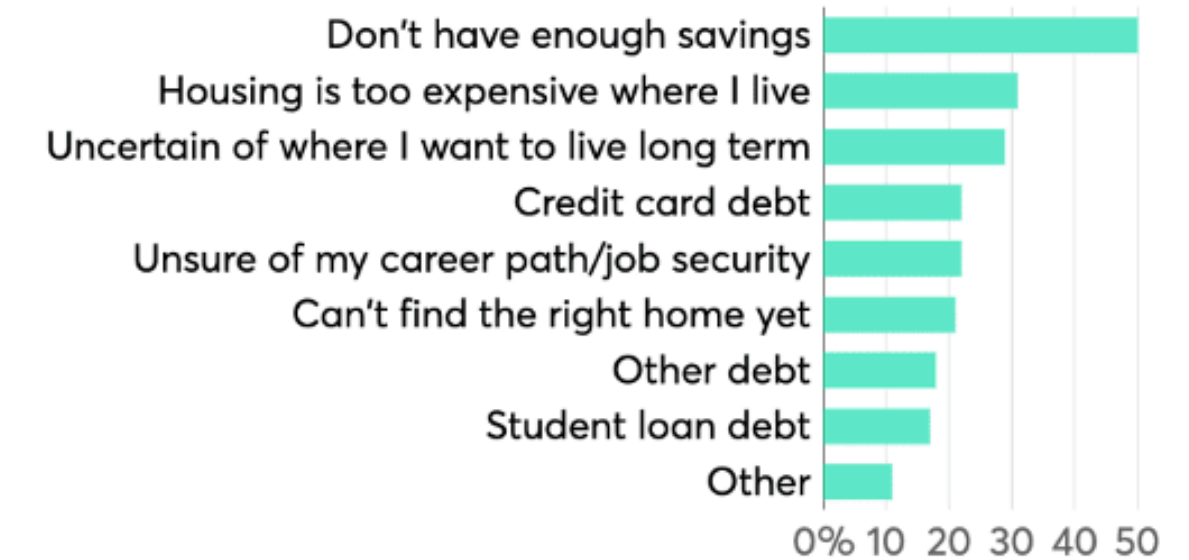
Introduction:

We teamed up with CNBC Make It to launch “Middle-Aged Millennials,” to explore how the oldest members of this generation have grown into adulthood amidst the backdrop of the Great Recession and the COVID-19 pandemic, student loans, stagnant wages, and rising costs of living. In the first part of this series, we look at homeownership among this age cohort:

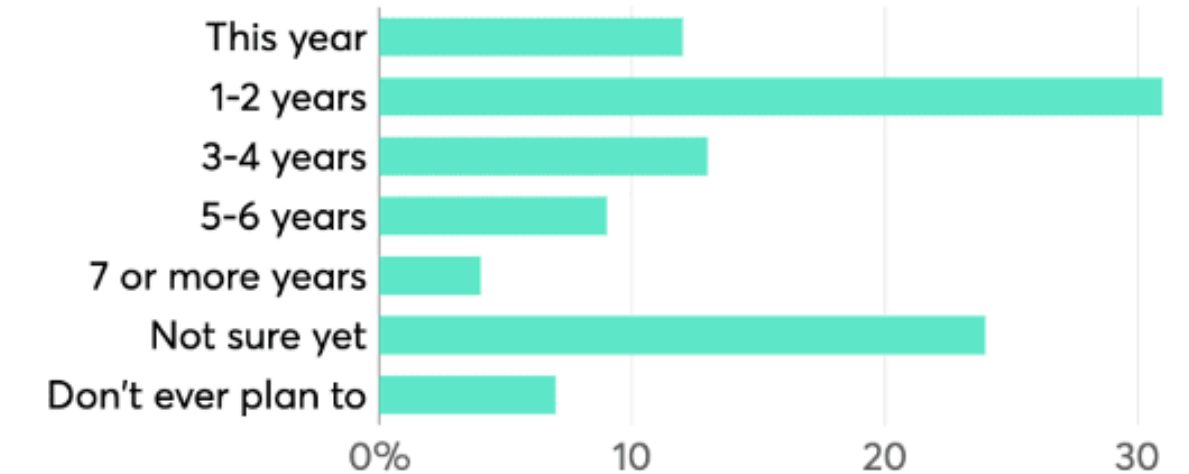
- **Homeownership didn't come easily:** Many Older Millennials had to get creative when paying for their home. About 10% took out a loan from their retirement accounts, while roughly 20% used a credit card to help. Nearly 1 in 5 also received help from their parents or other family members.
- Although most Older Millennials have managed to become homeowners, 28% still rent and 12% are living with their parents or other family members. Homeownership rates among Black and Hispanic Older Millennials lag their White counterparts, as do rates among those without a college degree.

- Debt has been a key factor hindering homeownership: 17% of older millennials who don't own a home say **student loans present a barrier** to homeownership. And half of older millennials say they're not homeowners because they don't have enough saved.

Which of the following are current barriers for you to own your own home?



When are you looking to buy a home?



Note: Out of respondents who said they don't own their home. Respondents were able to select more than one barrier.

Source: Survey of 1,000 U.S. adults ages 33 to 40 conducted from February 12 to 15, 2021.

Implication:

“When it comes to achieving homeownership, older millennials were just scrappy and very resourceful,” says Harris Poll CEO John Gerzema.

Section:

04

Topic:

SHOULD BRANDS BE ENCOURAGING COVID-19 VACCINATIONS? MOST CONSUMERS THINK YES: ADWEEK-HARRIS POLL

Introduction:

[In a new Harris Poll/Adweek survey](#), we looked at the role brands can play in building confidence in COVID-19 vaccinations and the opportunities it can present for brands:

- **Consumers want brands to speak up:** 60% agreed brands have an “obligation” to encourage people to get vaccinated, while 70% said they support brands sharing factual information about how and where to get vaccines.
- In addition, 62% believe brands have an obligation to **go beyond information dissemination itself to dispel myths** around COVID-19 vaccines.

- **The donut does help:** 70% of consumers think brand [rewards like Krispy Kreme's](#) could work to encourage more vaccinations. And it's not just shots: 60% of respondents said they'd be more likely to buy from a brand that offers promotions to encourage vaccinations.
- **Boomer Opportunity:** While a majority (58%) said they trust brands more than they trust social media when it comes to vaccination information, there is a wide generational divide: 73% of Boomers said they trust brands over social media, compared to 63% of Gen X, 44% of Millennials and 37% of Gen Z.

Implication:

Using brand equity to build confidence in the vaccines could be a brand building opportunity: 42% said a brand sharing information about vaccinations would bolster their views of the brand, while 43% said it wouldn't affect their opinion and just 15% said it would lower their opinion.

Section:

05

Topic:

AMERICANS WILL PREFER IN-PERSON SHOPPING POST-PANDEMIC: MORNING BREW-HARRIS POLL

Introduction:

We teamed up with [Morning Brew to run an exclusive poll](#) on how shopping habits have changed over the last year and found that while many did report a major shift toward digital during the pandemic, it turns out being very online isn't for everyone:

- Over 4 in 10 (43%) said they'll **mostly shop in-person** once COVID restrictions are lifted. Just 24% said they'd mostly shop online, with 33% saying they'd do both equally.
- 77% of respondents are at least somewhat likely to shop at their local mall or department store.
- Less than half (47%) of respondents said they're at least somewhat likely to use **delivery apps** post-pandemic. Though younger people reported a much higher willingness to keep the GrubHub and Uber Eats orders coming.
- More respondents (67%) plan to make big-ticket purchases IRL versus online (54%).

Pandemic-Driven Changes in US Adults' Shopping Behavior

	Pre-pandemic	During pandemic	Post-pandemic
Shop in-person or online at a major retailer for everyday purchases	63%	55%	84%
Shop in-person at a mall or department store	61%	32%	77%
Shop in-person or online at a local/mom-and-pop retailer for everyday purchases	45%	37%	76%
Make big-ticket/expensive purchases in-store	35%	18%	67%
Order food for delivery directly from a restaurant or ghost kitchen	30%	38%	60%
Make big-ticket/expensive purchases online	23%	23%	54%
Use food delivery apps	23%	31%	47%
Purchase at least some of my groceries online	22%	37%	52%

Note: "Pre-pandemic" and "During pandemic" columns were select all that apply, "Post-pandemic" shows % at least somewhat likely to do an activity
Source: Morning Brew-Harris Poll, March 2021, n=1078 US adults • Created with Datawrapper

Implication:

It's obvious that e-comm will remain a bigger part of everyday shopping than before. But Americans want to return to the physical realm too.

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
