

# COVID-19 CONSUMER RESEARCH WAVE 17 EXECUTIVE SUMMARY

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June 26-29, 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 17

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## WAVE 17 INTRODUCTION

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The following research was conducted between **June 26–29, 2020** by The Harris Poll. Fielded among a nationally representative sample of **3,161** U.S adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

Topic:

## SHIFTING ATTITUDES TOWARDS LOCKDOWNS AMID CASE RESURGENCE

Introduction:

Amid a resurgence of COVID-19 cases, hard hit states are reversing plans to reopen and re-instituting mandated restrictions in hopes of slowing the spread and preventing overwhelming hospitals. This weekend we asked those in the hardest hit states how they're feeling about facing another lockdown and what they think about how their state has responded.

Here we take a closer look at Arizona...

- **A majority supports another lockdown amid thousands of new coronavirus cases in Arizona:** Nearly 9 in 10 Arizonans (87%) are concerned about a new wave of COVID-19 outbreak in their area. In response, Gov. Doug Ducey on Monday ordered the state's bars, gyms, movie theaters, and water parks to shut down for at least 30 days, a decision that many support: (76%) of those in Arizona said they support another lockdown.

- **Nearly three-quarters (72%) of Arizonans say the first lockdowns were effective in their area, but a majority (61%) oppose their states re-opening:** Just three weeks after the stay-at-home orders were lifted and business closures expired, Arizona saw a big spike in the number of coronavirus cases on June 10th as [reported by NBC](#). In fact, half (47%) of Arizonans say one of the **biggest drivers of the resurgence** is that their state **reopened too soon and that they did not meet the criteria to reopen**. What's more is that (35%) of people in Arizona say their state **reopened in a cavalier manner, without critical systems in place to manage and track the virus transmission**.
- **How did we end up here again? Reckless behavior and no incentives to follow safety guidelines:** We asked people in Arizona what they thought were the biggest drivers for the resurgence of COVID-19 cases in their state and (53%) say **people in their state have acted reckless by not following safety protocols**. Pair that with over a third (35%) who say there was no incentive for people to follow state recommended safety protocols (e.g., masks) as they were not enforced requirements, but rather "recommendations".
- **Willingness to make sacrifices is starting to wane across the country:** While Americans are still willing to make sacrifices to help get America through coronavirus, the numbers are going down. Since March 30th, the percentage of Americans who would be **willing to quarantine indoors declined 10 percentage points** (78%, down from 88%) and those **willing to stop all travel domestically declined 12 percentage points** (76% down from 88%).
- **The pent-up desire to socialize and return to normalcy is gaining on safety:** Since March 23rd, the percentage of Americans who said they **would follow a mandated restriction of convening with groups no larger than 10 people and no dining in bars and restaurants saw a decrease of 9% and 10% respectively** (84% and 83% down from 93% and 93% respectively).

Implication:

There are two camps of philosophy when it comes to lockdowns in America; those in opposition say lockdowns put greater strain on our economy (61%) while also threatening our fundamental American freedoms and rights (47%); meanwhile, those in support say we need to make sacrifices now if we want any real chance at fighting COVID-19 (55%) and unless mandated to stay home, people won't follow the safety protocols and guidelines (52%). One thing is true, COVID-19 is not waiting for us to reconcile our differences; leaders must be decisive and act swiftly.

Section:

# 02

Topic:

## CELEBRATING JULY 4TH DURING COVID-19

Introduction:

America's birthday will look different this year without the iconic traditions that draw large crowds, but that's not getting in the way of enthusiasm; three-fifths (59%) say they are excited for the Fourth of July this year. And let's face it, after four months of COVID-19, we all need something to look forward to. Here's the American mindset going into the holiday weekend:

- **The American spirit is still alive:** Reflecting back on the most famous words of the Declaration of Independence - 'life, liberty and pursuit of happiness' - most Americans (69%) agree this spirit is alive today. And 78% say the Fourth of July is important to them, their family, and community - especially Seniors (82% vs. 73% of Gen Z/Millennials). The top reason Americans say July 4th is important to them is because **American independence is an important part of our history to be celebrated** (60%).
- **An important reminder to take stock of what we've got:** 54% say July 4th "reminds me **why I am grateful to live in America**" and 42% say "reminds me of fond memories of my childhood."
- **Our communities need a moment of joy:** Half (51%) say they are excited this year because we all need something to look forward to, 35% say **their community deserves a moment of joy**, 34% say the Fourth of July **brings my community together** and we need that now more than ever. And we could all use a break from the same walls we've been stuck inside the last four months: 30% say their family and they need an activity to get out of the house.

- **Will Americans be celebrating at all this weekend? Yes.** Four in 10 (39%) say they are attending or hosting a social gathering this year to celebrate. Younger Americans are the most likely to be celebrating (51% Gen Z/Millennials, 50% Gen X vs. 31% Boomers, 17% Seniors).
- **How will Americans celebrate this weekend?** Well, those in [Los Angeles](#) and [Miami](#) won't be going to the beach. Instead, one-third (34%) say they will be celebrating at home with other people in their household or (32%) watching fireworks from their home. Despite being a mainstay of Fourth of July celebrations, many cities are [cancelling fireworks altogether](#) this year.
- **Many say they feel safe celebrating and will follow safety protocols:** Two-thirds (66%) of Americans say they feel safe celebrating the Fourth of July this year - with younger generations (68% Gen Z/Millennial, 72% Gen X vs. 60% Boomers, 61% Seniors) feeling the safest. And thankfully, nearly all (94%) of those attending social gatherings say they will follow at least some C-19 safety protocols this weekend, including half (52%) who plan to wear a mask.
- [The New York Times](#) provides a guide in how to honor America's birthday (safely) in 2020.

Implication:

Though celebrations will look quite different this weekend, Americans are looking forward to a weekend of happiness and a short reprieve from the weight of the pandemic and social unrest.

Section:

# 03

**Topic:**

## COVID-19 IS CHANGING HOW WE TRAVEL THIS SUMMER - WILL IT STICK?

**Introduction:**

The Fourth of July might be the holiday that sets the stage for summer travel amid pandemic, ([Condé Nast Traveler](#) says this could be the busiest travel weekend since March).

- Could this be the summer of the 'Great American Road Trip'? Maybe! **Americans now think road trips are safer than flying** and will take more road trips to avoid airline usage this year. Around two-thirds of Americans (67%) say because of COVID-19, they'll probably be taking more road trips this year to avoid airline travel. Our latest research finds **summer travel plans are picking up** with nearly a third (29%) of Americans say they will travel in the next 4 months.
- **Americans say hotels are safer than Airbnb:** More than 3 in 5 Americans (65%) say in terms of sanitation practices, they think staying at a hotel is a safer option than staying at an Airbnb or other vacation rental. Americans indicate they are more comfortable at a hotel (55%) than at an Airbnb or other vacation rentals (42%).

- **Marketers should take notes from hotels:** Overall Americans agree that "Hotels have implemented enough new cleaning procedures to protect against the virus" (61%) and that "**Hotels have done enough to reassure me that staying at a hotel will be safe**" (60%).

**Implication:**

It's hard to predict if the behaviors we adopt during COVID-19 will stick or if our normal habits will bounce back, but right now, Americans are planning with precaution: when taking their next leisure trip, Americans are increasingly more likely to include a hotel stay over Airbnb/vacation rental (45% vs. 14%).

Section:

# 04

Topic:

## FROM THE INVESTOR PERSPECTIVE

Introduction:

The Harris Poll announced this week that we are [partnering with Yahoo Finance](#) on an [ongoing poll of investors, market and consumer trends](#). The survey takes a deep dive to better understand how work, spending, and investment habits have changed due to the Coronavirus. Here are a few key highlights:

- **The COVID-19-triggered recession is hitting women harder than men**, with only 47% of women saying they are still in the same job they held before the pandemic hit vs. 63% of men. Job losses hit Gen X women hardest, with 19% of women ages 35-44 saying they had been laid off or furloughed, compared to just 2% of men in that group.
- Across all age and income groups, Americans are cutting back, with 82% saying they have **reduced spending**. Again, there is a split between men and women, with 71% of all men predicting their spending will return to normal within a year vs. 62% of women. And one in seven women ages 55-64 say they think their spending will never return to normal.
- **Individuals are both pessimistic and optimistic when it comes to the markets**. Four of 10 people expect their investments will lose value over the next five years, with another 10% foreseeing a gain of less than 5% over that time span. Yet one-third of people are bullish, saying this is a good time to invest in equities.

Implication:

As seen in the inaugural survey, COVID-19 has presented the American people with a wide range of challenges. As we continue to progress and adapt to these difficult times, consumer insights will play an important role in uncovering the constantly changing beliefs on how investors are viewing the current state of the stock market.

*With the launch of the Yahoo Finance-The Harris Poll [Investor Index](#), investors will gain access to insights from a poll of sample investors that will occur twice a month to produce insights on consumer and workplace trends as the nation struggles to recover from the coronavirus pandemic and the punishing recession it has caused.*



Section:

# 05

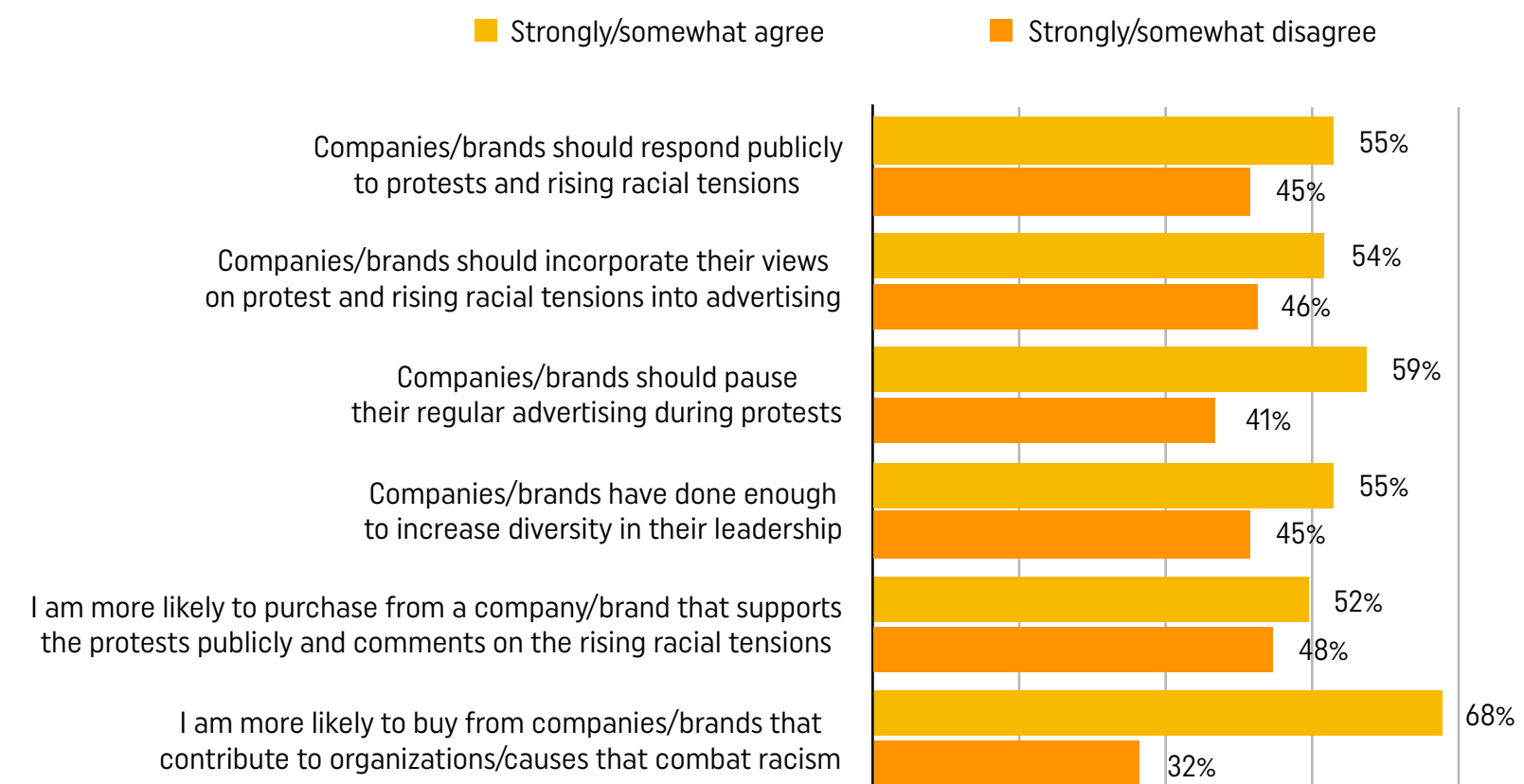
Topic:

## BRAND BEHAVIOR AMID SOCIAL UNREST

Introduction:

The Harris Poll also [announced last week](#) that they will be the exclusive polling partner for Ad Age, delivering business trends and insights from consumers and marketing leaders, as well as help brands understand and navigate ongoing industry disruptions. In the [inaugural survey with Ad Age](#) published last Wednesday, we looked at how consumers feel about brand behavior in response to the protests and rising racial tensions in America.

While results were mixed on brands' public statements and advertising strategy, there was broader agreement that brands should not pause advertising during the protests and, especially, that they should contribute to causes that combat racism.



Implication:

In this day and age, it's no longer acceptable to be silent.

[Read More](#)

# Questions?

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