

COVID-19 CONSUMER RESEARCH WAVE 19 EXECUTIVE SUMMARY

July 10-12, 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 19

WAVE 19 INTRODUCTION

The following research was conducted between **July 10-12, 2020** by The Harris Poll. Fielded among a nationally representative sample of **1,974** U.S adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

AMERICA IS FAILING THE TEST

Introduction:

John M. Barry, author of 'The Great Influenza' [quipped recently](#) when you mix science and politics, you get politics. He cites that "Italy, once the poster child of coronavirus devastation and with a population twice that of Texas, has recently averaged about 200 new cases a day when Texas has had over 9,000. Germany, with a population four times that of Florida, has had fewer than 400 new cases a day. On Sunday, Florida reported over 15,300, the highest single-day total of any state". Clearly we're going in the wrong direction and in new polling here's why:

- The countries that have flattened their curves did so through shutdown until achieving a steep downward slope in cases; they were in widespread compliance with public health advice; and third, created a workforce of at least 100,000 to test, trace and isolate cases. But without any national plan, our caseload is rising in thirty-five states. And perhaps our biggest challenge is in testing:
- **More than half of Americans (55%) have not been tested and don't think they should.** In our polling, this startling stat is actually a decrease of 10% since April 20th, when two-thirds said thanks but no thanks to the nasal swab. Interestingly, Boomers and Seniors (who are more at risk) are more likely than Gen Z/Millennials and Gen X (60% and 68% vs. 47% and 51%) and Republicans are more likely than Democrats (61% vs. 51%). A real head scratcher: more than half of Americans (54%) living in the hardest hit states say no to testing in AZ, CA, FL and TX.
- Meanwhile, **a fifth (21%) have not been tested but think they should**, especially Gen Z/Millennials vs. Seniors (26% vs. 16%) and Urbanites vs. those living in suburban and rural regions (28% vs. 20% and 14%). But making the decision to get tested is complicated and nuanced based on the test-seeker's situation, making [The Case for Smarter Coronavirus Testing](#), as reported on by The New York Times.

- Despite the rising concern around the surge in cases, most Americans (85%) say they **have not been tested for coronavirus in the past two weeks**, especially women (92% vs. 77%) and Seniors vs. Gen Z/Millennials, Gen X and Boomers (95% vs. 81%, 77% and 88%)
- **Yet Americans who have been tested said it's fast, convenient and accessible.** Nearly seven in ten Americans who have been tested for coronavirus (69%) say the process of getting tested was easy; nearly half (49%) say administering the test took no time at all and 48% say they received their results quickly.
- **Wait it out? Many Americans have confidence that there will be a vaccine by early Spring 2021:** more than three in five Americans (62%) are confident of this; Men are more likely (68% vs. 56%), as are Seniors, than Gen Z/Millennials (70% vs. 59%). Interestingly, both Republicans and Democrats are more likely than Independents (69% and 63% vs. 53%) to feel optimistic.
- **Finally, American concern for a new wave of COVID-19 is still high:** four in five Americans (80%) are concerned about a new wave of COVID-19 outbreak in their area. Democrats are more likely than Republicans and Independents (91% vs. 69% and 77%). Americans living in an urban setting are more likely than those in rural to be concerned (85% vs. 69%).

Implication:

Most Americans say they won't or don't need to be tested. But most Americans who have been tested say it's fast, easy and painless. So it's very hard to reconcile the perception with the reality – especially when those same people who say no are also overwhelmingly frightened of another wave (spoiler alert: we're still in our first wave). This reticence, ignorance, resistance – whatever you want to call it – needs to be overcome by consistent and clear public health guidance and national leadership.

Section:

02

Topic:

HEY, YOUR BELIEFS ARE STRESSING YOU OUT!

Introduction:

Nearly 3 in 5 Americans (58%) say they are more stressed out now compared to their normal stress level pre-COVID-19 (which will likely surprise no one). But taking a deeper dive into what is driving our national stress right now reveals that the age old saying 'you are what you eat' couldn't be more relevant. Polarizing content with extreme beliefs are rife amid the COVID culture wars. This week we look at how stress is being compounded by the type of content we consume and the modern ideologies we are organizing ourselves into whether we know it or not.

- **Those who watch polarizing media are more stressed out than normal:** more than seven in ten Americans (72%) who frequently consume news from Breitbart and Fox are more stressed out than normal, as well as 68% who frequent social media websites like Facebook for news. Meanwhile, more than half (54%) of those who never consume news on Facebook are actually less stressed and 48% are less stressed than those who never tune into Breitbart and Fox.
- **New ideologies on mitigation efforts are breathing life into COVID culture wars:** Nearly half (47%) who oppose mandatory masks are extremely/somewhat more stressed out than normal and 51% of those in opposition to taking down monuments and statues are more stressed out than normal.
- **Stuck in our own echo chambers:** 37% of Americans consume content from others who share their values and opinions very often vs. those with values they oppose (24%).

- **Exploring the other side of the aisle is a road less traveled:** Only 25% say they often consume content from others who have different values than their own. And 41% feel confused when they read content from people whose beliefs and values they disagree with, while a quarter (26%) feel frustrated and angry.
- There is work to be done on the inside too, **the way out requires some inward reflection (and turning off Netflix):** Only 11% are coping with their stress by going to therapy, meanwhile nearly two thirds are tuning out and watching TV (64%).

Implication:

Living life on the extreme is a vicious cycle; extreme beliefs begets polarization. Balancing the scales requires constructive investigation into the idea of extremism. But thankfully more Americans say they feel empathetic and accepting (31%) when they read content from others with different beliefs than their own vs. those who feel compelled to change others' minds to their own (21%). We are living in an "us versus them" culture while expecting outcomes that can only come from a "we" society.

Section:

03

Topic:

CONSUMERS: CORPORATE MASK POLICIES A MUST

Introduction:

As cases rise, mask-wearing is becoming less political and more sensible. In our data, just released with [Business Insider](#), more than three quarters support mandatory facial coverings. But how to stop the temper tantrums in aisle 4? Americans say, kick it to the boardrooms. Starbucks got this started with a uniform policy on masks and Americans think it's a good idea and will support those who demand facial coverings.

- **Majorities favor mandatory masks:** 77% of Americans favor a mandatory face mask policy, with no major differences between men and women, young or old, or even between racial groups. But slightly fewer Republicans (64%) and Rural-dwelling Americans (66%) said they support a mandatory face mask policy.
- Three-quarters (76%) say they **believe businesses should “enact and enforce” their own mandatory mask policies**; even more (78%) of those living in the hardest hit states (AZ, CA, FL, TX). An equal number said **retail workers should be responsible for enforcing those policies**, including 83% of the hardest hit states.
- Of course, that's not so easy to do if you're bagging the groceries and not armed with a taser. Enforcement has been unfair and challenging to front line workers but 87% of Americans said they **would follow a retail worker's order to wear a mask** including 90% in the hardest hit states.
- Not surprisingly, seniors are more supportive of business mandated mask policies (82%) than Gen Z/Millennials (66%), as are higher income households (80% \$110K+ vs. 72% <\$50k) and Democrats (83% vs. 73% republicans and 69% IND).

- Another incentive: **Majority of Americans (80%) say they are more likely to do business with a company** who require customers and employees to wear a face mask.
- **Wearing masks in public has become more popular since March.** The percentage of Americans who have a positive reaction to people wearing face masks in public has risen 14 percentage points since March 28 to June 15 (54% to 68%). The shift is attributed to those who were indifferent to masks: (33% said 'neither positive nor negative' on March 28, which has decreased to 19% on June 15).
- **There is still a small fraction of anti-maskers** who view masks in public as **negative and have remained unchanged** at (13%) since March. Nothing's likely going to change their minds.
- Others are avoiding mask-wearing by getting in the car: **The Bank Drive-Through Makes a COVID Comeback.** After banks closed lobbies, [their drive-up lanes lined up with customers who prefer tellers over ATMs](#), the WSJ reports: "Calls to service drive-through equipment jumped 42% in April and May compared with the average of the previous 12 months. Cylinder sales (for pneumatic tubes) are up 300% over the same period. Axios says, **“Drive-Thrus are having a renaissance** as customers seek out options that let them avoid doing business indoors”.

Implication:

The majority of Americans are on board with masks. And these are the very same people who want them on everyone when they go into grocery stores, big box retailers and coffee shops. But it's unfair that mask policing is left to employees. Business can't essentially leave this to 'the governors'. The message to business: be a leader and consumers will comply and support you with their business. In this economy, it seems like a no-brainer.

[Read More](#)

Section:

04

Topic:

OPINION: IF FACEBOOK DOESN'T MOVE FAST, IT MAY BREAK ITS MOST VALUABLE ASSET — ITS BRAND

Introduction:

The Harris Poll's co-CEO William Johnson wrote a very thoughtful Op-ed on the Facebook boycotts utilizing new Harris Poll data revealing the boycott's power lies less in its financial might than its PR profile. To read the article in its entirety [click here](#).

Catch-up on Will's prior appearance on Yahoo Finance's On The Move [here](#).

Section:

05

Topic:

BACK TO SCHOOL? OR GO TO YOUR ROOM?

Introduction:

As the Fall school year quickly approaches, **Americans are greatly divided on the school or home debate**. But can risks be mitigated? Can teachers be protected? And will we leave decision making to communities, states or the government? We take the pulse on parents who see going-or-not as a no-win decision either way.

- **America weighs the risks of reopening schools in the Fall:** Nearly half of Americans (44%) **believe the risks from COVID-19 are still too great** and prefer online learning for their children. Meanwhile, 32% believe the risks can be mitigated **through a hybrid model with a mix of distance learning and in-classroom** instruction.
- **Who is responsible?** Only a quarter (25%) of Americans say **educators have a responsibility to think creatively** and strive to have children in the classroom in the fall, but **this is politically divisive**; 35% of Republicans vs. only 15% of Democrats say it's the responsibility of educators. **Party lines are delineated across risk tolerance**, 56% Democrats vs. 33% of Republicans say the risks are too great to have kids back in school.
- **Right now, it's falling on the families:** 66% say they are more **open to homeschooling their children until schools are back to normal**, which is **highest among those living in urban areas** (74% vs 65% suburban and 58% rural).
- **Parents are worried about their children's ability to thrive without a classroom:** 53% are concerned their children will lose out on the **ability to socialize with their peers and teachers**, which is especially important for rural students (63% vs. 52% suburban and 48% Urban). Nearly half (47%) worry they won't **receive the extra services they require** (therapy/counseling) and 46% fear they will **not learn as well as in-person learning**.

- **Schools are a health and economic lifeline for many:** 31% fear their kids will **not receive the proper nutrition they typically receive in school**. Meanwhile, parents' economic health is at stake; 44% worry about the costs of **having to pay for more at home supervision and costs preparing food which the school normally provides** (34%). As well as their job: 56% are concerned about **juggling work and supporting kids** while at home doing online learning.
- **As for College in the Fall:** 44% believe college should be all online this fall as opposed to a hybrid model (41%) or allow students in person (16%).
- **What do College kids want?:** More than 3 in 10 of those currently enrolled in college or planning to attend in the fall **are planning to stay at home and take courses online**. College students in the hardest hit states are more likely to be planning to stay at home and take courses online vs. those in the Northeast (43% vs. 31%).
- **Hey Colleges, no campus? then pay up:** 83% say that if colleges offer all online courses, they should reduce the tuition rate.
- In the remote world, the return on investment for the online college degree may equate to learning in-person, with 68% saying **online degrees are just as valuable as a traditional degree**.

Implication:

There is no winner here and no easy decision. Pediatricians and childhood development experts say kids need to be in school for socialization, cognitive development and maturation. Parents cite a litany of needs from care-giving to special needs assistance. Yet public health experts warn of asymptomatic transmission. Teachers unions chafed of being treated like guinea pigs even as Republicans label them essential workers. Everybody wants what's best for the kids while stopping the spread. This most likely looks like a state-by-state, district-by-district policy organized around coronavirus caseloads. It didn't have to be this way.

Questions?

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