

COVID-19 CONSUMER RESEARCH WAVE 101 EXECUTIVE SUMMARY

March 18 - 20, 2022

Stagwell 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 Stagwell Family

Global Chief Marketing Officer, EVP



WAVE 101

WAVE 101 INTRODUCTION

The following research was conducted between **March 18 - 20, 2022** by The Harris Poll. Fielded among a nationally representative sample of **1,998** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

PFIZER & MODERNA SEEK AUTHORIZATION FOR SECOND ROUND OF BOOSTERS

Introduction:

Pfizer and Moderna recently [filed for approval](#) for a fourth dose of the COVID-19 vaccine and the FDA [will meet soon to discuss](#) criteria and timing for these boosters. We checked in with Americans on how they feel about another dose. Here's what we found:

- Good News for Pfizer: (82%) of vaccinated Americans 65+ report being likely to receive a second booster shot if the FDA authorizes Pfizer's request.
- Among those boosted or planning to be, (88%) are likely to receive a second COVID-19 booster shot if it becomes recommended by medical professionals and health officials.
- **Vaccine brand loyalty decreases:** Back in December, (76%) of those with plans to receive a booster shot were going to stick with their initial vaccination brand. Now, of those who would receive a second booster shot, only (51%) are **likely to stick with their original booster vaccine brand if they get a second shot.**

- Among the (12%) unlikely to receive a second booster, half (51%) say it isn't necessary, (28%) say it's a ploy to make pharma companies more money, and (22%) say it's useless as the pandemic is or is about to be over.

Implication:

Given some public health experts are [warning of a coming COVID surge](#), a second booster could prove critical in protecting the most vulnerable Americans.

Section:

02

Topic:

AMERICANS CALL ON COMPANIES TO TAKE ACTION AGAINST RUSSIA

Introduction:

Russia's invasion of Ukraine is a concern for most Americans (83%) and consumers are looking for American companies to take financial action. Here's what we learned:

- Nearly half (45%) of Americans **have tried to help in some way**: (19%) have donated money, (10%) have supported local Ukrainian-owned businesses, and (9%) paid for food or Airbnb's in Ukraine..
- Three-quarters (74%) of Americans say **companies should stop doing business in Russia**. Older Americans are more likely than younger generations to want companies to exit (Gen X: 78%, Boomers: 87% v. Gen Z: 64%, Millennials: 58%).
- A majority (69%) of Americans - and (83%) of Boomers - would **refuse to support a company still operating in Russia** and would find an alternative company or product.
- **Americans are taking note** of companies that have removed or decreased their operations and investments in Russia, with (44%) recalling fast food companies, (33%) for streaming and media, (33%) for payments and financial services, (26%) for big tech, and (25%) for energy and oil.
- Among those familiar with Big Tech's response, (86%) agree **that social media should be taking action** in how their apps are being used in Ukraine and Russia.

- Grammarly is [continuing to pay its workers](#) who joined the Ukrainian army to fight Russia.

Implication:

Americans are watching how companies respond to the war on Ukraine and the opportunity for companies to take a stand against Russia will prove a critical moment in reputation management for many global companies.

Section:

03

Topic:

HOW TO BREAK THE CYCLE OF FEAR DRIVEN BY COVID AND WAR - AND PROTECT YOUR KID'S MENTAL HEALTH: APA HARRIS POLL STRESS IN AMERICA

Introduction:

Two years after the World Health Organization declared COVID-19 a pandemic, our data, in partnership with the American Psychological Association and [covered by USA Today](#), found that (63%) of Americans feel their lives have been forever changed. Here's what else we found:

- **It's not just the virus:** Top sources of stress were the rise in prices of everyday items due to inflation (87%), followed by supply chain issues (81%) and global uncertainty (81%).
- **Americans are emotionally overwhelmed:** (87%) agreed it feels like there has been a constant stream of crises over the last two years, and more than seven in 10 (73%) are overwhelmed by the number of crises facing the world right now.
- **Money and economic stress are mounting:** The proportion of Americans who noted money as a source of stress (65%) is up significantly from our surveys in June (61%) and February (57%) 2021.
- **Widespread grief and worry about children's development:** Almost half of those reported a big increase in sedentary behavior, which will be difficult to reverse, and a majority revealed significant unwanted weight changes. Drinking and substance abuse have been on the rise because of the stress of the pandemic and its restrictions.

Implication:

Compounding financial stressors for Americans that were already on the rise in the wake of the COVID-19 pandemic have been exacerbated by Russia's invasion of Ukraine.

Section:

04

Topic:

20 BRANDS GETTING GEN Z'S ATTENTION (AND DOLLARS): AD AGE-HARRIS POLL

Introduction:

The debut of our Gen Z Brand Tracker poll, [in partnership with Ad Age](#), found that targeted efforts by Lexus, Ocean Spray, Cinnamon Toast Crunch, and other companies are making gains with these coveted consumers

- **Context:** The poll ranks changes in brand equity – that is, how much this generation's perception and intent regarding these brands changes quarter to quarter.
- Lexus comes in on top with its **successful switch away** from TV advertising to TikTok **micro-influencer partnerships and e-sport sponsorships** targeted towards younger consumers.
- Ocean Spray soared to the second spot **after riding a wave of popularity** after an **organic viral hit on TikTok** depicting TikToker Nathan Apodaca skating to a Fleetwood Mac song and drinking the brand's juice.
- **Brands in the Metaverse:** Hyundai, which placed 17th in the poll, used the metaverse to let younger audiences take drives on Roblox.
- **Partnerships are key for Gen Z consumers:** Hyundai has partnered with South Korean boyband BTS and Cinnamon Toast Crunch with Olympic snowboarder Chloe Kim and NFL's Justin Jefferson.

How Does Your Brand Compare?

Brand positioning impacts brand equity and consumer loyalty. Learn how Harris Brand Platform reveals real-time insights to keep you informed.

[Learn More](#)



Implication:

According to Harris Poll CEO Will Johnson, this increased familiarity and brand equity with Gen Z comes as brands “continue to invest in partnerships, channels, and activities closer aligned to (this generation's) experience.”

Section:

05

Topic:

DOVE CASE STUDY: THE POWER OF BRAND PARTNERSHIPS

Introduction:

Using Harris Brand Platform, we evaluated the impact of beauty brand [Dove's advertising partnership](#) with TikTok. In this case study, we see how the partnership helps Dove increase brand usage among younger consumers and allows TikTok to strengthen its reputation.

- As part of its Self-Esteem Project, Dove launched a #NoDigitalDistortions campaign on TikTok in Spring 2021 to encourage body acceptance by asking TikTok users to post without digitally altering their images.
- Examining Millennial and Gen Z consumer data, we see a **significant lift in familiarity with Dove (+6.2)** post-campaign and a **(+1.2) lift in purchase consideration**.
- The greatest growth was in Dove's sales conversion funnel: post-campaign, brand trial (+5.8), usage (+9.0), and recommend (+3.9) among Millennial and Gen Z significantly increased.
- TikTok also benefited from the partnership, tying their brand with Dove's message of body acceptance at a time when social media has been criticized for undermining users' self-confidence and sparking body dysmorphia.

Implication:

Dove's case study shows how brands can benefit from strategic partnerships that can strengthen each participant's brand by building off the positive reputation and qualities of the other.

Questions?

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KNOWLEDGE IS POWER
