

COVID-19 CONSUMER RESEARCH WAVE 106 EXECUTIVE SUMMARY

APRIL 22 - 24, 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 106

WAVE 106 INTRODUCTION

The following research was conducted between **April 22 - 24, 2022** by The Harris Poll. Fielded among a nationally representative sample of **1,996** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

THE DIFFERING CONCERNS BETWEEN GEN Z AND BOOMERS

Introduction:

While there is overall concern about societal stressors like inflation, crime rates, and racial inequity among all Americans, there are, however, distinct generational divides between Gen Z and older Boomers.

- While (62%) of Boomers report being very concerned about the economy, inflation, and jobs, less than half of Gen Z Americans (45%) say they are very concerned.
- Additionally, over 6 in 10 Boomers (62%) are very concerned about crime rates in the U.S., close to double that of Gen Zers who are very concerned (33%).
- However, Gen Z was more likely to be very concerned about racial inequity (48%) than Boomers (30%) – the disparity could be partly attributed to [Gen Z being the most racially and ethnically diverse](#) U.S. generation yet.
- And more Gen Z reports being very concerned over affording their living expenses (45%) than their older Boomer counterparts (36%).

Implication:

Companies should seek to better understand the varied concerns among different aged Americans – especially as it may relate to consumerism and their workforce.

Section:

02

Topic:

EARTH DAY GREEN MESSAGING: 3 STRATEGIES TO GUIDE BRANDS: AD AGE-HARRIS POLL

Introduction:

Environmentalism is a widespread and largely popular movement, so how can brands distinguish their green messaging and connect with consumers who care? In [partnership with Ad Age](#), we surveyed American consumers to uncover the current environmental landscape and discover how brands can stand out.

- The majority of adults (76%) are concerned about **the health of the environment** and/or the threat of **climate change**.
- More Americans (80%) **believe that corporate sustainability efforts** rather than individuals (57%) play a key role in combating climate change.
- Consumers prefer when ads explain **what actions a company takes to combat climate change** rather than announcing a company's monetary donation towards environmental efforts.
- Almost 1 in 5 Americans said that they would be less **likely to support a brand** that ran ads focusing on humans' negative impact on the environment.

Implication:

According to Harris Poll CEO Will Johnson, "Not only do big corporations have the standing to talk about the environment—it would behoove them to, as more than three-quarters of U.S. adults say that they would think more highly of brands that act to protect the environment."

Section:

03

Topic:

WORSENING ALLERGY SEASONS: IS CLIMATE CHANGE TO BLAME?: HEALTHDAY- HARRIS POLL

Introduction:

Global warming is likely to cause longer and more severe allergy seasons as increased temperatures and CO2 result in larger plants and greater pollen production. Partnering with [HealthDay](#) we surveyed 2,000 U.S. adults on their experience with seasonal allergies.

- Between (10 to 30%) of the world's population **suffers from seasonal allergies**, and the percentage is increasing.
- By 2018, pollen counts were (20%) higher than in 1990, and by 2100, **pollen emissions could increase** by up to (40%).
- Almost three-quarters (74%) of allergy sufferers say **symptoms negatively impact** their overall quality of life.
- More than (70%) of allergy sufferers say symptoms **prevent them from getting a good night's rest**.

- **About half of allergy sufferers** agreed with a series of allergy-related statements, including: "I feel like **my seasonal allergies are getting worse every year.**"

Implication:

Kathy Steinberg, vice president at the Harris Poll said, "Other points in the survey suggest that the situation is only going to get worse." With climate change likely worsening the length and severity of allergy season, tackling global warming could be the answer to halt this trend.

Section:

04

Topic:

THE DISCONNECTS STALLING CONNECTED HEALTHCARE: ZS- HARRIS POLL

Introduction:

While the healthcare industry has become increasingly digitized, significant disconnects remain, negatively impacting both patients and providers. In our latest survey, [in partnership with ZS](#), we examine the path to connected healthcare and how companies can develop a solution.

- While (80%) of primary care providers think their patients feel cared for, **only (42%) of U.S. adults report feeling cared for by their doctors.**
- The majority **(79%) of U.S. adults** would regularly **share vital sign data with a healthcare provider** if this information was used to improve their health.
- **About one-third of healthcare consumers use connected options**, including online health portals (38%), health tracking devices (29%), and telehealth options (23%).
- While (73%) of consumers would like to access healthcare anytime, only (56%) of doctors agree.

Implication:

Healthcare consumers and providers agree that a more connected healthcare system would allow for increased direct communication, improved diagnoses, earlier detection of health issues, and overall improved community health.

Section:

05

Topic:

HOME CARE & PRODUCTS: AN INDUSTRY SNAPSHOT

Introduction:

Our [recent report](#) on the state of the home care industry explores consumer sentiment towards pet food purchases, cleaning habits, and mattress-in-a-box brand Purple's growth. Using [Harris Brand Platform](#) data, we rank the leading home care brands by equity and growth. Here's what we found:

- Fifty-three percent of Millennial pet owners purchased **pet food made from natural ingredients**, 34% purchased **organic pet foods**, 31% purchased **CBD pet products**, and 18% purchased **food for alternative diets** (e.g., vegan, raw).
- Men (39%) reported more often than women (27%) that they **purchased specialty food products to treat their pets**.
- Twenty-seven percent of U.S. adults say that the **features they look for in a cleaning product have changed** because of the **COVID-19 pandemic**.
- **Clorox** topped the list of home care brands, with a **brand equity score of 70.1%**, while **Pedigree** pet food saw **the greatest brand equity growth (4.4%)** among home care brands from Q4 2021 to Q1 2022.

Implication:

Americans' home care needs and preferences evolved during the COVID-19 pandemic. Brands must understand shifting consumer priorities to effectively develop and market

Questions?

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