

COVID-19 CONSUMER RESEARCH WAVE 70 EXECUTIVE SUMMARY

July 30 - August 1, 2021

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 70

WAVE 70 INTRODUCTION

The following research was conducted between **July 30 - August 1, 2021** by The Harris Poll. Fielded among a nationally representative sample of **2,026** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

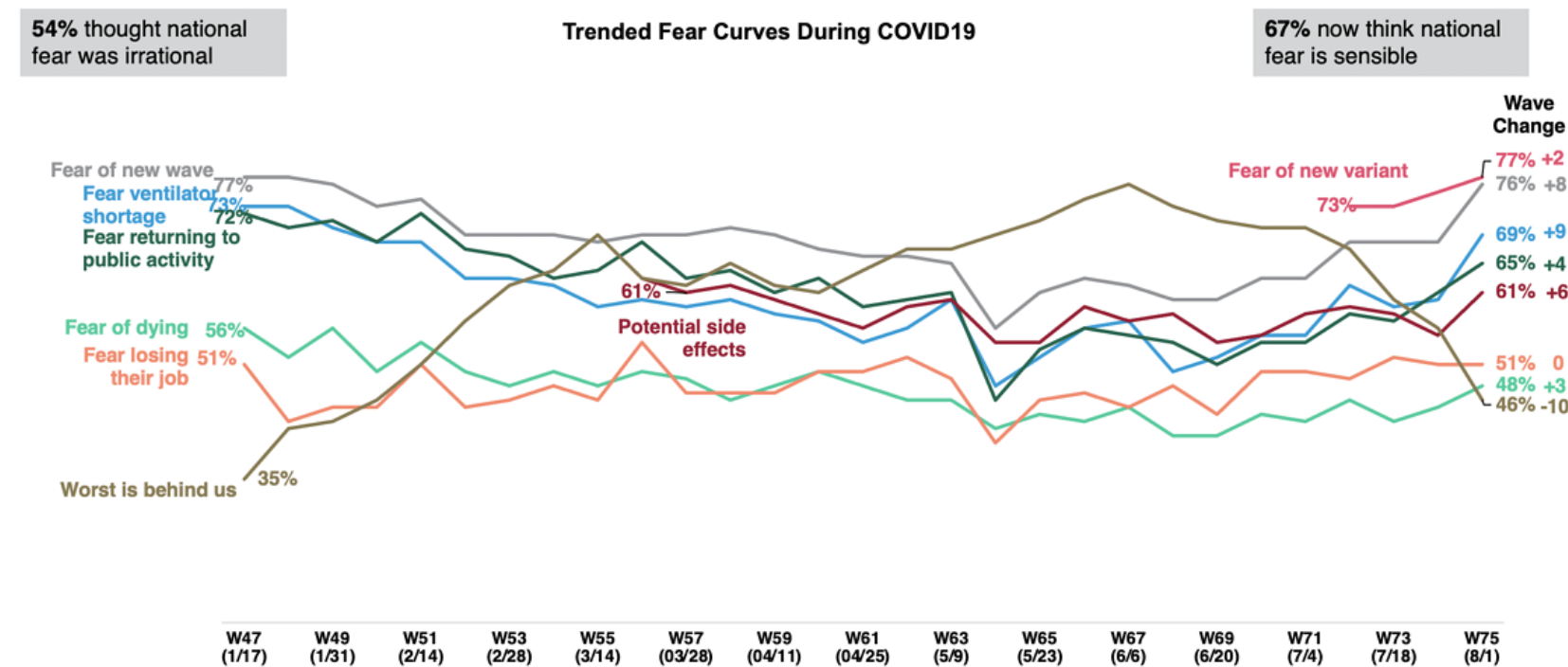
FEAR RETURNS

Introduction:

Fear is on the continued rise in America. In our latest survey we found that the rising numbers in fear may be more than just a blip in the radar. Here's a deeper look:

- As **Delta variant** cases of COVID continue to surge, it is now one of Americans' top fears with three-quarters (76%) saying they are **very or somewhat concerned about the strain**.
- **Other fear factors:** Three quarters (76%) of Americans say they fear a new wave of COVID, (+8-pts) from just last week, while (65%) say they fear returning to public activity (+4-pts).
- **Fear of dying:** Nearly half (48%) of Americans fear they could die if they contracted COVID, but just a mere (14%) of those who say they will not wear a mask again indoors say the same.
- **But, Americans are fearful of more than just the pandemic:** (81%) report being very or somewhat concerned about **inflation**. Other top concerns include **mass shootings** (80%) as well as potential future COVID **variants** (77%).

Fear Returns



Implication:

Fear was subsiding among Americans as the rollout of the vaccine progressed, but as the unvaccinated continue to dig their heels in against inoculation we see optimism fading to fear comparable to that of the height of the pandemic.

Section:

02

Topic:

AMERICANS ARE AFRAID THEIR VACCINE PASSPORTS COULD GET HACKED: ANOMALI-HARRIS POLL

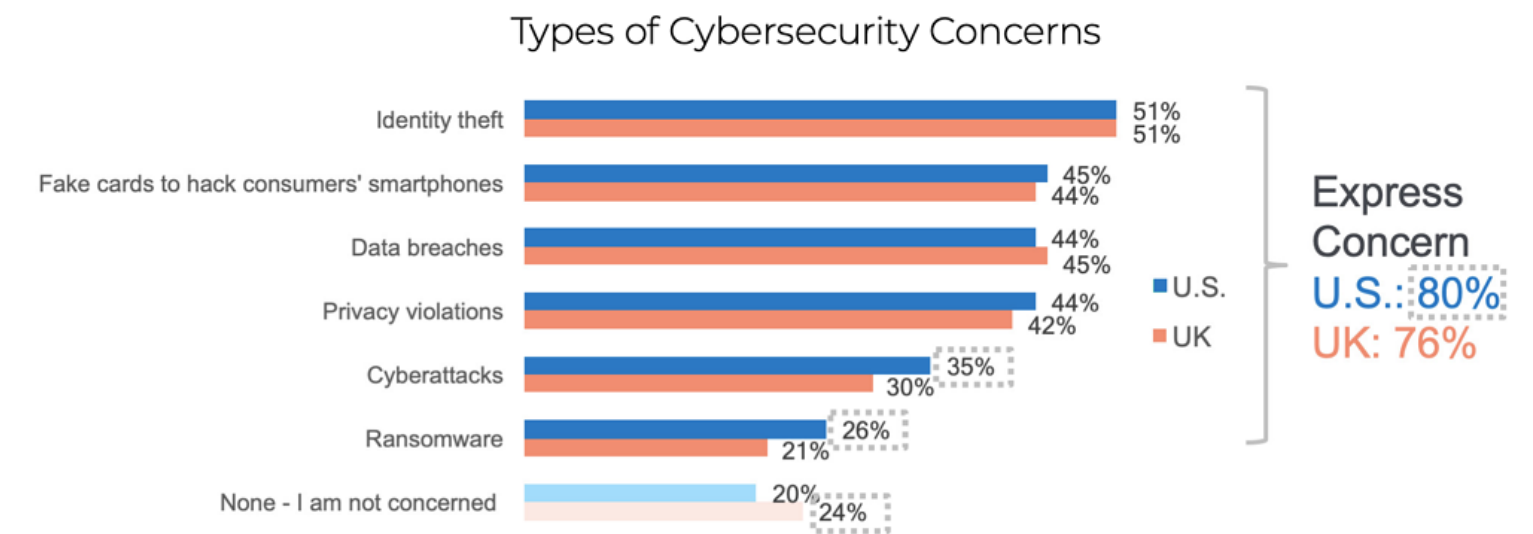
Introduction:

Getting Americans to adopt digital vaccine proof has been slow and, according to our survey in partnership with Anomali, the threat of a cybersecurity attack is not helping. See the [full results](#) of our survey in the Global Health Pandemic and Cybersecurity Challenge report. [Fast Company](#) writes more:

- Although (93%) of Americans have a smartphone capable of supporting a digital vaccination card, only two-thirds (68%) **say they are likely to get the card.**
- **Cybersecurity concerns:** A majority (80%) of Americans express some cybersecurity concern regarding digital vaccine cards, with (51%) saying identity theft is top of mind.

- **The opponent:** One-third of Americans (36%) say they think nation-state cyber actors are likely to be the culprit for a cyberattack.
- **Who's responsible?** In the event of an actual cyberattack, (63%) of Americans say the government should be responsible for defending digital vaccine verification card users, while only (27%) say it should be the consumers themselves.
- **New Yorkers will need to get their vaccine passports ready:** [the city announced yesterday](#) proof of vaccination will be required before dining indoors or going to the gym.

MAJORITY CONCERNED ABOUT SECURITY OF DIGITAL VACCINE CARDS



Although most consumers are open to COVID-19 digital vaccination cards, they are also aware of the risks. More than three-quarters expressed specific cybersecurity concerns.



BASE: ADULTS 18+ (US: n=2,021; UK: 1,007)
Q4 What cybersecurity concerns do you have when it comes to digital vaccine verification cards?

Indicates significantly higher between the 2 countries at 95% confidence

Implication:

For COVID digital vaccine cards to be successful, the public and private sectors will have to collaborate to develop, deploy, manage, and secure them - especially because only (48%) of Americans think government and private businesses are prepared to defend consumers against potential cyberattacks.

Section:

03

Topic:

THE JOURNEY TOWARD FINANCIAL FREEDOM: PERSONAL CAPITAL-HARRIS POLL

Introduction:

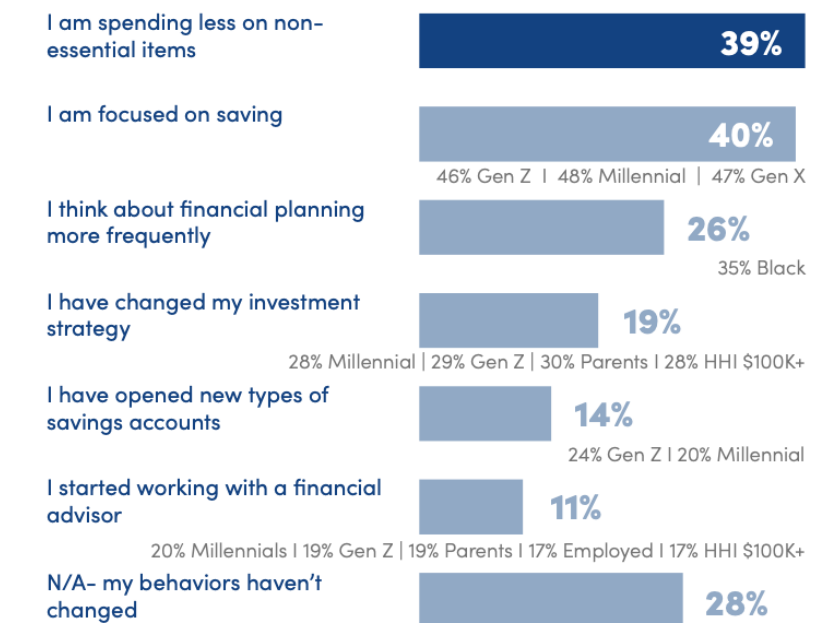
The pandemic changed a lot of things for Americans, including work, family life, and more. Our new study with Personal Capital shows that it also made many reconsider their personal finances. The Harris Poll-Personal Capital Journey Toward Financial Freedom report can be [found here](#). Our friends at [CNBC](#) write more:

- Half (51%) of Americans say that **having an emergency fund is now a higher financial priority** than it was pre-COVID.
- Nearly four in ten (39%) of Americans said they were **spending less on non-essential items**, including (46%) of Gen Zers, (48%) of Millennials, and (47%) of Gen Xers.
- In addition, (37%) said they found that post-pandemic, **they can be happy spending less than they're used to** and (35%) said **they can live off less than they previously thought**.

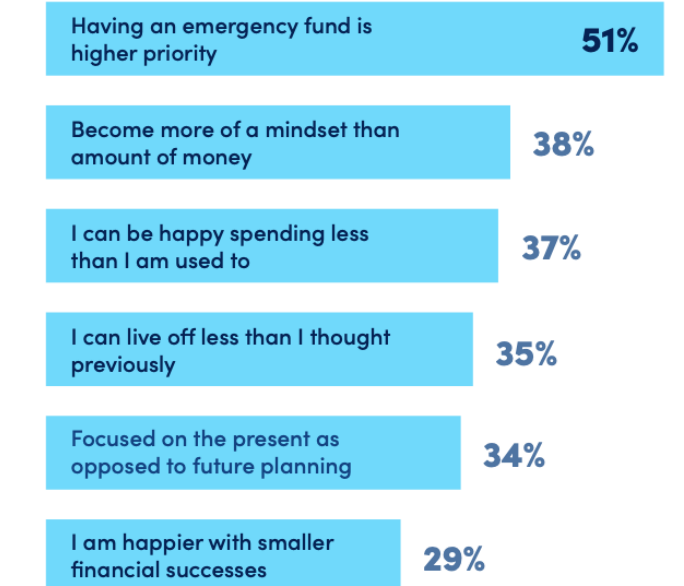
Back to Basics in the Pandemic

The pandemic also changed Americans' financial habits, renewing their focus on stability. COVID-19 taught us to expect the unexpected, and Americans went back to basics to shore up their finances so they can withstand any future shocks.

How money behaviors changed due to the COVID-19 pandemic



Ways Covid-19 has changed financial health definitions



Q20: How have your behaviors with money changed since the COVID-19 pandemic? (n=2005)



Implication:

The days of impulse purchases may be gone as consumers remain cautious about their spending and look to build their savings because of the pandemic, but marketers can reach this new type of consumer by tapping into built-up demand for things such as experiences and travel that Americans are eager to get back to.

Section:

04

Topic:

WHAT ARE EMPLOYERS LOOKING FOR IN NEW HIRES?: EXPRESS EMPLOYMENT PROFESSIONALS-HARRIS POLL

Introduction:

The pandemic has caused a disruption in the [labor market](#), as we've highlighted in an earlier newsletter, but companies are still hiring. So what are hiring decision-makers considering when looking over applicants? Our study with Express Employment Professionals [digs deeper](#):

- Eight in 10 (83%) U.S. hiring decision-makers look for **willingness to learn in their applicants** - a quality known as a soft skill.
- Other soft skills hiring decision-makers are looking for are **dependability** (82%) and **communication skills** (81%) - more traits that make employees easy to work with and can lead to successful relationships among team members.

- More than three-quarters say **problem-solving skills** (79%), **adaptability** (78%), or **initiative** (78%) are also of high importance.
- The focus on these attributes may in part be because more than half (57%) say their company had problems with **low employee productivity** during the pandemic compared to before.

Implication:

Soft skills have always been important, but the pandemic reminded us of their importance and created more urgency for them. Express CEO Bill Stoller says "those who are dependable, flexible, communicate well and get along with others offer the full package for employers looking to add quality employees to their workforce."

Section:

05

Topic:

2020 SUMMER OLYMPICS: AN OUTLOOK ON VIEWERSHIP AND BRAND VALUE

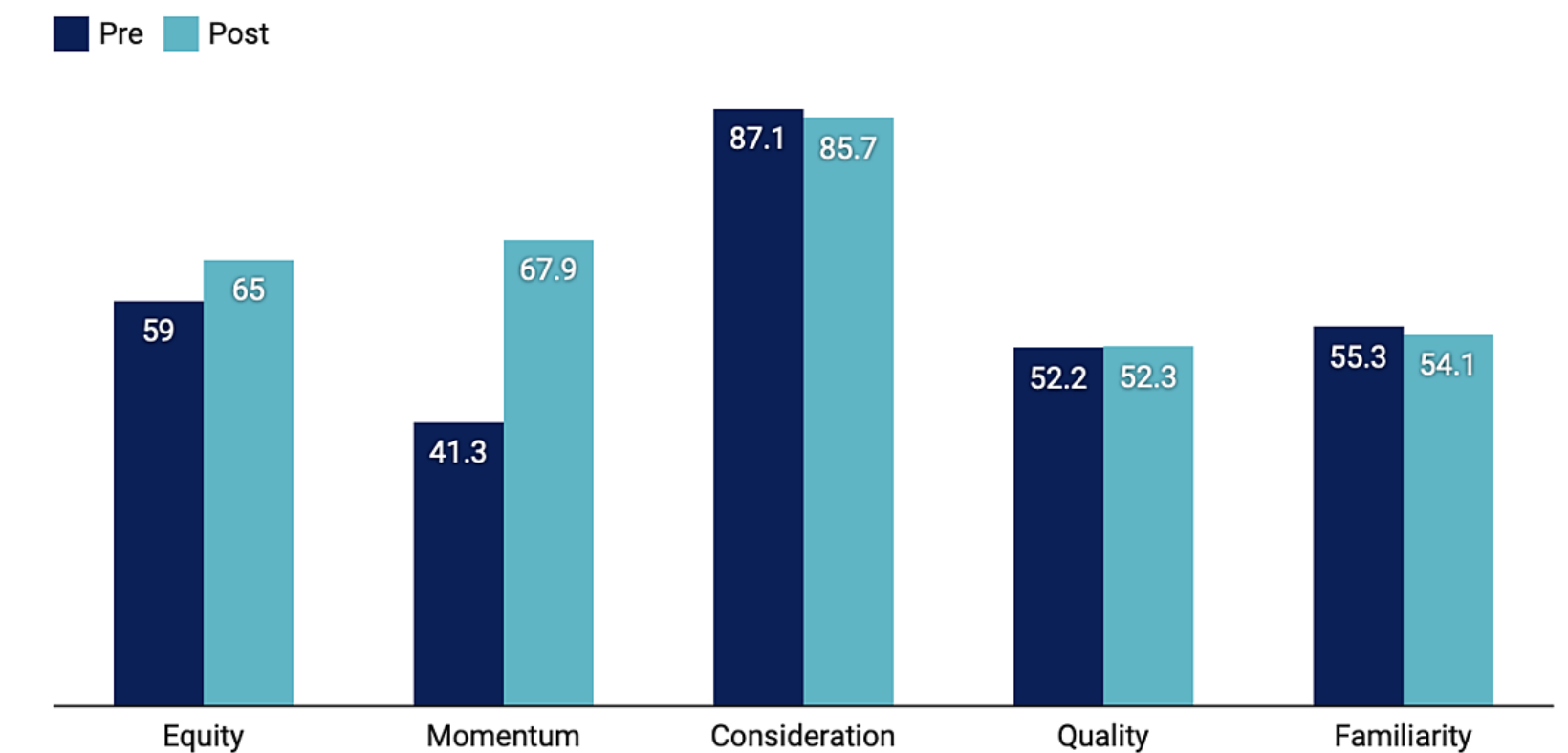
Introduction:

The 2020 Summer Olympics are upon us, and like all Olympics Games before them, they're dominating the headlines. Recent numbers suggest viewership for the Tokyo Olympics have been underwhelming, but in [polling we conducted earlier this summer](#), most Americans were poised to tune in. So what happened?

- **A strong fan base undergirds the Olympic Games:** even in the wake of controversy and COVID-19, (75%) of Americans feel that the Olympics are worth watching. We found three potential reasons that could explain the reduced actual viewership.
- **Confusion around scheduling:** As recently as June, (55%) of Millennials and (46%) of Gen Zers still weren't aware that the 2020 Olympics had been rescheduled.
- **Recent news coverage:** A quarter of Americans (25%) report that they're less likely to watch this year's Games because of what they've seen in the news.
- **Lack of live fans:** A strong majority (75%) of Americans say a live audience is important to the experience of the Games - and the (lack of) atmosphere in empty stands likely impacted the appeal for some viewers.

- NBC's streaming app **Peacock** has experienced a boost in both **brand equity and momentum** among consumers since the Games started – an early indication that NBC's bet on the Olympics [as a springboard for pulling ahead in the streaming wars](#) may just pay off.

NBC's Peacock: Brand Equity



Pre data collected from 7/15/21-7/22/21 among 102 U.S. adults; Post data from 7/23/21-7/29/21 among 100 U.S. adults

Implication:

Decreased viewership could be bad news for brands as the Olympics are a major advertising event, with this year's Games [securing over \\$1 billion in ad spend among more than 120 advertisers](#). Yet less than half of Americans (46%) pay attention to which brands advertise during the Olympics. [Stay tuned to see what our post-Games wrap up](#) will discover about the advertising success of brands.

Questions?

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KNOWLEDGE IS POWER
