

# COVID-19 CONSUMER RESEARCH WAVE 86 EXECUTIVE SUMMARY

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November 19 - 21, 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 86

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## WAVE 86 INTRODUCTION

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The following research was conducted between **November 19 - 21, 2021** by The Harris Poll. Fielded among a nationally representative sample of **2,053** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

**Topic:**

## PANDEMIC HOLIDAYS, ROUND 2

**Introduction:**

Despite [COVID cases in the U.S. rising again](#), over half of Americans (55%) plan to attend or host gatherings with family and friends this holiday season – up from 48% who told us they celebrated Thanksgiving in-person last year. In a consultation with the CDC, we surveyed how Americans are getting ready to spend the holidays after the stressful holiday period of 2020. Here is what we found:

- **Many will be traveling for the holidays:** Among those planning to attend a small holiday gathering with friends and family, many will also be traveling domestically (64%) and internationally (52%).
- **But you better watch out:** Over one-third of vaccinated Americans (37%) are ready to uninvite those who fail to follow COVID-19 precautions.
- **Bring your side dish... and your mask:** Nearly half (48%) of vaccinated Americans say they would ask visiting family/friends to wear a mask - and 30% of unvaccinated Americans would do the same.
- **COVID safety at the dinner table - what are people doing:** For those attending or hosting holiday gatherings, over a third of respondents will wear a mask indoors (39%), avoid potentially risky settings before attending (38%), and stay physically distant from others (35%) in hopes to minimize COVID-19 risks.
- Interestingly Gen Z (67%) and Millennials (67%) are more hesitant to spend the holidays with unvaccinated family members even though they are at lower risk of severe COVID-19 infections (Gen X: 49%, Boomers, 45%).

**Implication:**

For a second year, the COVID-19 pandemic will impact holiday gatherings and travel plans, though with vaccines - and now boosters – widely available, family time and consumer spending will hopefully feel more like 2019 than 2020.

Section:

# 02

## Topic:

# IT COULD BE THE MOST EXPENSIVE THANKSGIVING EVER – HOW FOOD BRANDS ARE RESPONDING: AD AGE-HARRIS POLL

## Introduction:

According to our latest [Ad-Age Harris Poll](#), consumers are preparing for what is likely to be the most expensive Thanksgiving feast they've ever prepared. Retail prices are up sharply this year and supplies are down at a time when consumers are planning bigger celebrations than they did last year. Here's what we found:

- Overall, 80% of Thanksgiving shoppers have **paid more** for food than they had anticipated.
- **Where are the Thanksgiving pies?** Over half (56%) of shoppers **struggled to find items** – canned pie filling and cranberry jelly (47%), turkey (43%), baked goods and pies (40%) – and nearly half (46%) have **adjusted their menu plans** because of this.
- **It's time to market:** 58% report being swayed by advertisements and effective purchase drivers are providing recipes or décor inspirations (47%); reminders to shoppers to pick up a particular item (45%) or straight discounts (43%). **Brand affinity doesn't break the top three reasons.**

## Implication:

The poll indicates shoppers are significantly affected by supply chain gluts and inflation this year but could be influenced by marketing as two-thirds reported using coupons. Marketers determined to make a success of the lucrative food holiday should approach consumers with empathy as a coupon or a recipe idea doesn't seem to hurt.

Section:

# 03

**Topic:**

## 2 OUT OF 3 AMERICANS WANT A VACCINE MANDATE FOR DOMESTIC AIR TRAVEL: FORBES- HARRIS POLL

**Introduction:**

Ask Americans if the United States should have a Covid-19 vaccine mandate for flights within the country and a big majority says yes, according to our latest COVID-19 Tracker and covered [exclusively in Forbes](#).

- Two-thirds of Americans (66%) said **airline passengers should have to provide proof of vaccination before flying in the U.S.**
- Support is strong across all genders, age groups and income levels, though it skews highest among females (69%), Millennials (69%) and people earning more than \$100,000 per year (71%).
- **Support for a domestic air travel vaccine mandate has remained strong and steady since summer:** in early August, we found 64% of Americans supported introducing a vaccine passport for domestic flying. Those who “strongly supported” such an initiative outnumbered those who “somewhat supported” it by more than two to one.

**Implication:**

Despite strong support among Americans, Transportation Secretary Pete Buttigieg insists such a mandate is not likely. Airlines and travel companies will need to keep Americans confident in the safety of domestic flying by continuing to impose measures such as mask requirements and vaccine mandates for travel industry workers.

Section:

# 04

**Topic:**

## WANT TO REACH GEN Z WITH OOH ADS? SOCIAL MEDIA CAN HELP: OAAA-HARRIS POLL

**Introduction:**

It's tough to catch Gen Z's attention with traditional media formats - unless the campaigns are shared on social media. Out of home (OOH), for instance, grabs their attention when images are reposted and shared online, according to our latest survey with the Out of Home Advertising Association of America (OAAA) and featured in [Campaign Live](#). Here's what to know:

- **Social media amplifies OOH campaigns:** Two-thirds (67%) of Gen Z and Millennial consumers have **viewed OOH ads** on social media and large numbers would **reshare those images** (91% of Gen Z and 82% of Millennials).
- **Younger generations are engaged:** 85% of Gen Z and 78% of Millennials have engaged with OOH ads such as downloading an app (Gen Z: 46%) or making an online purchase (Millennials: 27%).
- **Metaverse Ads:** Both Gen Z and Millennials (82%) would view ads within AR or VR formats.
- **But privacy concerns remain:** Marketers should be wary of coming off too strong when targeting young demographics with ads, as most Gen Zers (72%) and Millennials (77%) still worry that their data is being used to target them with ads.

**Implication:**

The results “should be a wake-up call to all digital marketers,” said Anna Bager, president and CEO of OAAA in a statement. “Although Americans, particularly young Americans, are wary of targeted online advertising, they have a growing appetite for advertising that speaks to their needs.”



Section:

# 05

**Topic:**

## COUNTDOWN TO THE DISCOUNTS: BLACK FRIDAY SHOPPING

**Introduction:**

While not as popular as a Thanksgiving turkey dinner, the discounts on Black Friday and Cyber Monday are finally here for many Americans. In our latest poll, we found out who's shopping this holiday weekend:

- Four in 10 Americans (40%) will shop this Black Friday or Cyber Monday - and the discounts are especially popular among younger generations: over half of Gen Z (52%) and Millennials (55%) plan to shop this year (vs 41% of Gen X and 23% of Boomers).
- **Some have been waiting all year:** And among shoppers this Black Friday or Cyber Monday, 8 in 10 (81%) have been waiting for the discounts on specific items - including 38% who are eyeing 6 or more items.
- **Online shopping becomes more prevalent:** Compared to last year, half of consumers plan to shop more online (51%) than they do shopping locally (26%) and at big box stores (25%). Nearly three-fifths of Gen Z and Millennials (both 57%) intend to do more online shopping this year.
- Yet, there is close to a quarter of Americans (23%) planning to spend less this year due to having **less spare cash** (57%) and finding **discount prices still too high** (31%).

**Implication:**

Even in the face of rising inflation, more than half of Americans (35%) plan to spend more this Black Friday weekend than they did last year. And while online shopping remains popular, [we have previously found](#) an increased desire among consumers to return to in-person holiday shopping as COVID-19 numbers go down.

# Questions?

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