

COVID-19 CONSUMER RESEARCH WAVE 90 EXECUTIVE SUMMARY

December 30, 2021 - January 2, 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 90

WAVE 90 INTRODUCTION

The following research was conducted between **December 30, 2021 - January 2, 2022** by The Harris Poll. Fielded among a nationally representative sample of **2,066** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

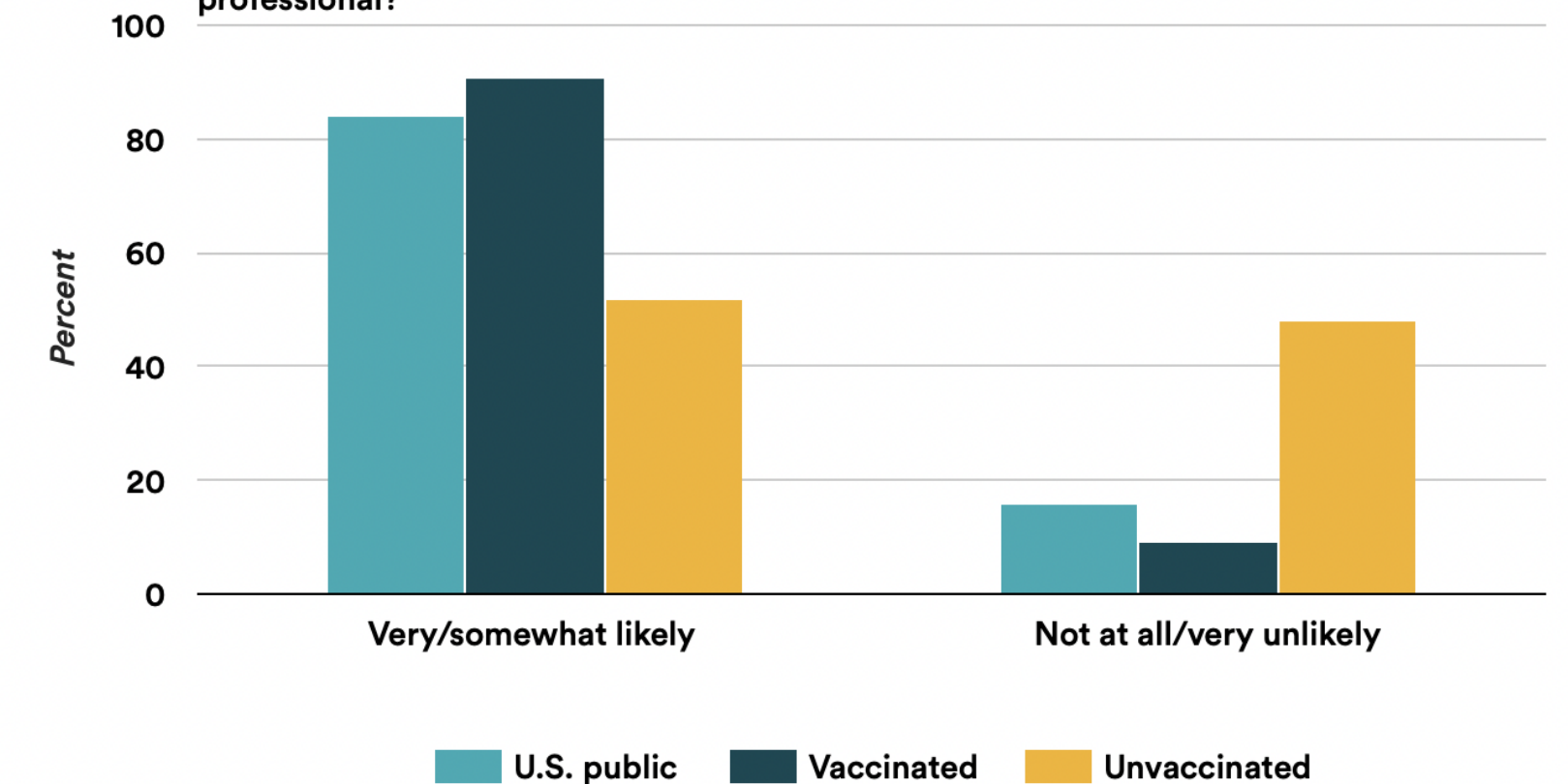
VACCINATED AMERICANS FAR MORE LIKELY TO TAKE PFIZER COVID PILL THAN UNVACCINATED: STAT-HARRIS POLL

Introduction:

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- Just before regulators authorized use of a widely publicized COVID pill from Pfizer, only half of Americans (52%) were aware the treatment could prevent hospitalization or death, according to a new survey by [STAT and The Harris Poll](#). Here's what else they know:
- Of those who were familiar with the Pfizer pill, 84% are likely to take it if they test positive for COVID, with no large differences between generations, racial groups, or political affiliations.
- **But there was one key difference:** 91% of vaccinated people would take the pill, but only 52% of all unvaccinated Americans said they would be likely to.
- The likelihood an unvaccinated person would take the pill dropped further to 35% among those who with no plans to be vaccinated.

How likely would you be to take Pfizer's Covid-19 pill if it was prescribed by a health professional?



- Overall, slightly less than half (46%) of all unvaccinated Americans indicated they are **unwilling to receive a vaccine or the Pfizer pill**.

Implication:

"Paxlovid's initial market is more likely to be vaccinated (and boosted) urban liberals who are older, or who have chronic conditions. As America 'surfs variants', you could see it - and Merck's pill - becoming a popular way to treat future exposures," said John Gerzema, CEO of The Harris Poll.

Section:

02

Topic:

HOW SHOULD WE BE MEASURING THE PANDEMIC?

Introduction:

As Omicron leaves an unprecedented number of COVID cases in its wake - [one million on Monday](#) - it may be hard to determine the severity of the pandemic on cases alone, especially when many are breakthrough ones. So we asked Americans which metrics we should be using:

- Americans are evenly divided when asked which metric is the best indicator in judging the severity of the pandemic today: 34% say cases are the best metric, while 33% say hospitalizations, and 33% say deaths.
- **Short term goal:** 40% say minimizing the number of deaths due to COVID by focusing on vaccines and other treatments should be the primary short-term goal, while 34% say it should be keeping cases to a minimum and preventing exposure, and 26% say the goal should be preventing hospitals from being overwhelmed.
- **Long-term goal:** Americans are evenly divided on the long-term goal of the pandemic, 51% say we must learn to live with occasional surges of COVID but otherwise return to normal; 49% say getting to 'COVID Zero' - or keeping the number of new cases to a minimum - should be the goal. Gen Z is most adamant about getting to COVID Zero (60% vs 46% of Boomers).

Implication:

COVID cases and resulting hospitalizations used to be strongly correlated, yet Omicron's surge among the vaccinated and previously infected is leading to [a decoupling](#). The staggering case numbers are cause of alarm, but businesses considering precautions may want to follow [Dr. Fauci's](#) advice and look at hospitalizations in their community as the better metric in determining the severity of the situation.

Section:

03

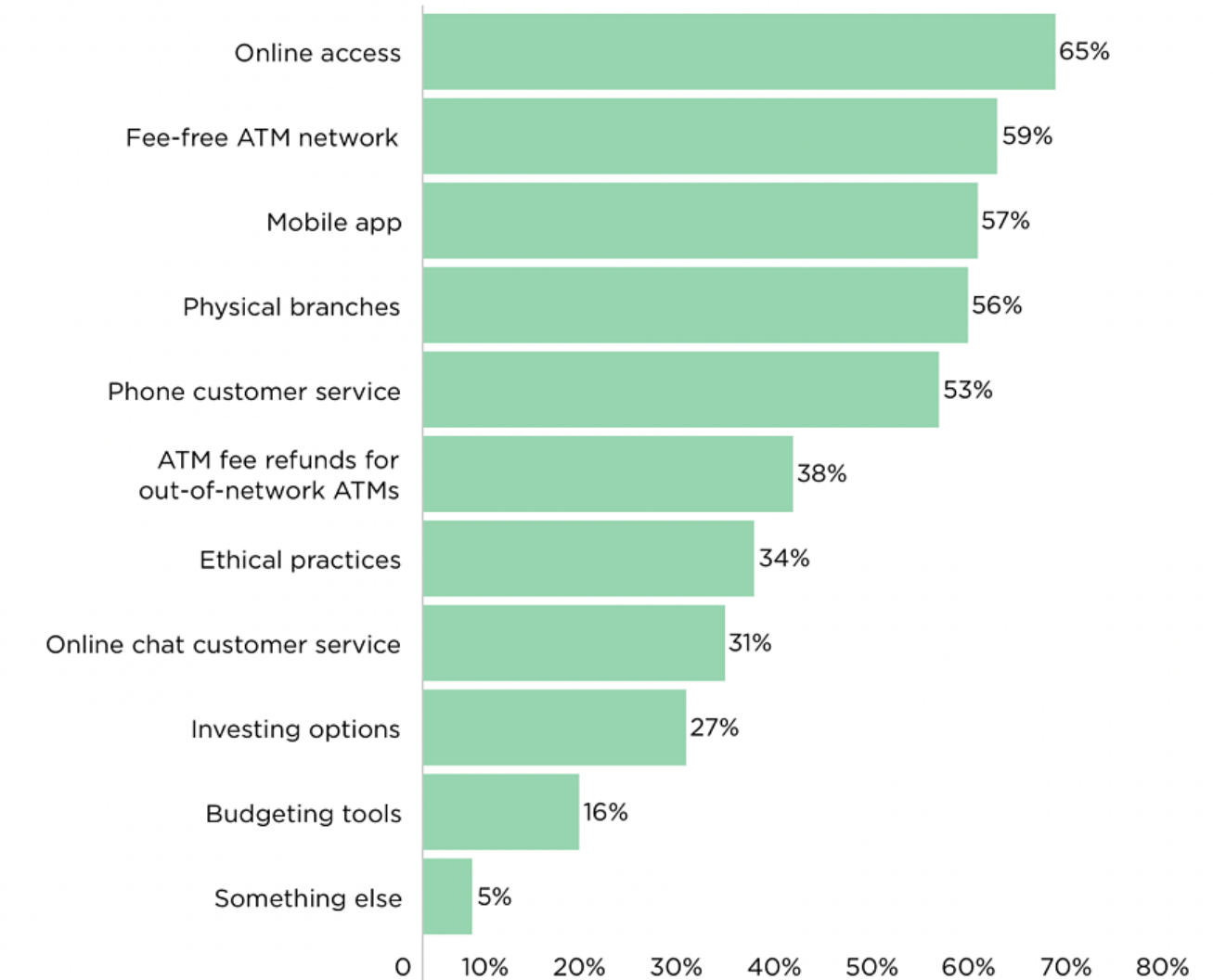
Topic:

MOST LIKE THEIR BANK – WHAT TO SEEK IF YOU DON'T: NERDWALLET-HARRIS POLL

Introduction:

According to our survey with NerdWallet, just over half of American banking consumers (53%) say they're very satisfied with their current primary bank, while 30% are somewhat satisfied and 17% are unsatisfied with their financial institutions. Here's what we learned:

- **Functionality of online tools and services:** Online access (65%) and mobile apps (57%) are among the top services or features that banking consumers say are most important to consumers.
- **But human connection still matters:** Physical branches (56%) and phone customer service (53%) are two other features important to more than half of banking consumers.



Source: NerdWallet survey conducted online Oct. 12-14, 2021, by The Harris Poll. Respondents include 1,870 Americans who have a primary bank (defined as the bank they use most often), and they could choose more than one answer.

- **But it's not all about the features:** Most consumers (78%) say it is important their bank is ethically or socially responsible, while one-third (33%) want to switch to an ethically and socially responsible bank - but aren't sure how to find one.
- Further, 45% reported choosing their bank in part of their ethical business practices or dedication to a community or mission, while 22% don't care.

Implication:

Consumers want to know they can trust their bank to ethically invest and handle their money. Banks that betray the trust of their customers have a long road ahead - [just ask Wells Fargo](#).

Section:

04

Topic:

AN UPDATE ON QUARANTINE GUIDELINES

Introduction:

Last week, our friends at The Centers for Disease Control and Prevention (CDC) [updated their recommendation](#) for people who tested positive for COVID, from ten to five days if they aren't showing symptoms if they wear a mask for an additional five days. Here is what Americans think about this decision:

- Two-thirds (64%) support the CDC's recommendation that asymptomatic people can resume masked public activity after 5 days, with support higher among Boomers (68%) and Gen X (66%) than Gen Z (56%) or Millennials (59%).
- **However, a divide exists over its implications:** just over half (53%) say the decision is risky and people will ignore the recommendation when they are still showing symptoms in order to get back to public life, while 47% say it is the correct decision as asymptomatic people are less likely to be contagious and we must balance risk of COVID exposure with keeping society open.
- Vaccinated Americans (55%) are more likely than those unvaccinated (45%) to say it's too risky of a recommendation given people will ignore it.

Implication:

[Many businesses](#) are struggling to keep operations running as workers fall sick and have to quarantine given how rapidly Omicron is transmitting through communities. While the shortened time frame may cause anxiety for many, the recommendation may be critical in avoiding mass closures.

Section:

05

Topic:

NEARLY 9 IN 10 AMERICAN WORKERS LOOK TO EMPLOYERS TO BUILD RETIREMENT SAVINGS DURING THESE UNCERTAIN TIMES: FUNDING OUR FUTURE-DAILYPAY- HARRIS POLL

Introduction:

Our latest survey in partnership with Funding Our Future and DailyPay [reveals](#) that a majority are anxious about their current financial situation as the pandemic exacerbated economic inequities. Here's what we learned:

- More than half of Americans (58%) are **anxious about their current financial situation**, with the financial anxiety greater among those aged 18-34 (71%), renters (70%), and those with household incomes under \$50,000 (67%).
- **What can employers do?** Close to 9 in 10 (87%) of employed Americans say that it is very (54%) or somewhat important (32%) that their employer offers a retirement savings program, such as a 401(k) account.
- These benefits are so important that (67%) of employed Americans say that they would be very or somewhat likely **to switch employers** if their current employer did not offer a retirement savings program.

- Additionally, many employed Americans (59%) say that they would **benefit from getting paid more frequently** at work than they currently do, including (70%) of hourly workers ages 18-55.

Implication:

We have previously reported on [The Great Resignation](#), and these findings are an additional warning to employers that they need to be cognizant of their provided benefits when attracting, retaining, and engaging their employees - as many are willing to leave for better financial benefits elsewhere.

Questions?

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