

COVID-19 CONSUMER RESEARCH WAVE 93 EXECUTIVE SUMMARY

January 21 - 23, 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 93

WAVE 93 INTRODUCTION

The following research was conducted between **January 21 - 23, 2022** by The Harris Poll. Fielded among a nationally representative sample of **2,120** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

CONSUMERS IN 2022 ARE ANXIOUS, UNCERTAIN, AND STRESSED OUT: AD AGE-HARRIS POLL

Introduction:

In a recent [op-ed in Ad Age](#), Harris Poll CEO Will Johnson looks at how circumstances have changed as we enter year three of COVID-19. So why do so many Americans feel an existential anxiety so redolent of spring 2020?

- **Americans are antsy about their jobs:** “The Great Resignation” isn’t stopping as nearly one in four Americans (23%) report plans of quitting their job within a year, and younger workers (ages 18-24) were twice as likely than their older colleagues (34% v. 15%, respectively).
- **Americans are anxious about inflation:** More than half (55%) self-described as very concerned about escalating prices in November. Household expenses are key: Americans worry most about being able to afford staples including groceries (84%), gasoline (83%) and home energy (78%).
- **Americans are overwhelmed:** Two-thirds of parents (68% of fathers and 64% of mothers) in this country say that managing child care decisions is an “overwhelming” experience.

Implication:

Advertisers should continue to respect consumers for where they are mentally and physically. They want to engage in the world - travel, move, quit their jobs, change - but uncertainty and inflation are making them hesitant and worried.

Section:

02

Topic:

COVID VACCINE MAKERS PFIZER, J&J NOTCH HIGH BRAND MARKS AMID OVERALL STILL-STRONG PHARMA INDUSTRY REPUTATION

Introduction:

Can the pharma industry hold onto its pandemic-minted positive reputation? So far so good, according to [our latest data featured in Endpoint News](#).

- The pharma industry notched a 59% overall positive industry sentiment, ahead of financial services (51%) and insurance (47%), and it's not that far behind typical favorites like consumer packaged goods (64%) and retail (66%).
- **Just behind Amazon:** While 68% of people around the world rated the Amazon brand positively, 62% say the same about Pfizer, 61% about J&J, and 53% Moderna.

- The lower rating of Moderna may be attributed to it not being as available or well-known globally, in South Korea where Moderna vaccines are available, the brand earned a 59% positive rank, side-by-side with Pfizer (62%) and J&J (63%).
- **Don't count J&J out:** while it's the lowest of the three vaccine brands in US vaccine ranking, the **brand ranks above Pfizer** in Brazil, China, India, Russia, and South Korea.

Implication:

The pharma industry will need to be aware of how their future developments, business endeavors, and price changes could threaten American and global sentiment.

Section:

03

Topic:

WILL AMERICANS ADOPT THE N95?

Introduction:

Across the country this week, [the federal government will begin distributing 400 million free N95 masks](#) via pharmacies and community health centers. We checked in with Americans to see how they view different types of masks in protecting against COVID:

- What is most effective? 86% of Americans think N95/KN95 masks are effective in protecting against COVID, while 75% say surgical masks are effective, 55% say the same of cloth masks, while one-third 35% say the same of neck gaiters or bandanas.
- Despite being viewed as the most effective mask, N95/KN95 are the third most worn mask (29%) - trailing cloth masks (36%) and surgical masks (33%).
- Gen Z (20%) are lagging behind older generations in adoption of the N95/KN95 (31% Millennials, 31% Gen X, 29% Boomers).
- Yet, if availability were not an issue Americans would prefer N95/KN95 (62%) over surgical (12%) or cloth (11%).
- [Vox explains](#) why N95 masks are the best option during the Omicron wave.

Implication:

Given contagiousness of Omicron, increased usage of more effective masks like the N95 will be critical in businesses being able to stay open and avoid labor disruptions and outbreaks.

Section:

04

Topic:

BRANDS ARE OVERCONFIDENT WITH THEIR PRIVACY APPROACH: REDPOINT GLOBAL-HARRIS POLL

Introduction:

Most brands believe the future without third-party cookies will have a moderate or large impact on how they acquire customers, and their ability to deliver quality customer service to them, according to our new report with Redpoint Global and [featured in Adweek](#).

- **A world without third-party cookies has marketers concerned:** A majority (65%) admit that this shift is likely to have a big or moderate impact on their ability to acquire new customers.
- Most (71%) admit it will have a big to moderate impact on their ability to deliver an exceptional customer experience.

- **Brands recognize the need to offer something of value to people in return for collecting their data:** 57% are considering incentives, while 53% are investing more in first-party data systems and 51% are pursuing alternative identifiers.
- Four in 10 people (39%) are **willing to let all brands** use tracking cookies to improve their experience - and 67% are **willing to let some brands** they explicitly approve use tracking.

Implication:

Marketers need to keep in mind the key theme of consumers getting something in return. Otherwise, about 74% of consumers are willing to opt out of all cookies on devices and browsers, if given the option.

Section:

05

Topic:

HOW CYBERSECURITY HAS CHANGED SINCE THE PANDEMIC STARTED: ANOMALI-HARRIS POLL

Introduction:

[Our recent survey among 800 cybersecurity decision makers](#), conducted with Anomali, provides visibility into the current cybersecurity threat landscape and reveals the top challenges to establishing a resilient cybersecurity posture. Here's what we found:

- Since the pandemic started, 83% of enterprise security decision makers have experienced more attempted cyberattacks, while 87% report an increase in phishing emails - with **many of these phishing attempts using COVID-19 related themes**.
- Only 49% of these decision makers strongly agree that their cybersecurity teams can quickly prioritize threats based on trends, severity, and potential impact on their organization.

- More than three-quarters (78%) have re-evaluated cybersecurity strategies since the start of the pandemic, while 74% say their **budgets for cybersecurity have increased over the past year**. They report, on average, that 38% of their overall budget is now devoted to cybersecurity.

Implication:

"This new research reveals that adversaries have not only stepped up the number of attacks they have started launching since COVID-19 first struck the world, but have also greatly improved their success rates," said Hugh Njemanze, President, Anomali.

Questions?

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