

The Great Awakening



A year of life in the
pandemic as documented
by The Harris Poll

Introduction	3
1 American Psyche	5
<i>A Year of Fear, Dislocation and Desire, The Journey to Normal, An End in Sight</i>	
2 Snapshots of Lives Altered	9
1 HEALTH AND WELLNESS	
<i>Life Interrupted by Loss, The Kids Are Not Alright, Youth Dispel Mental Health Stigmas</i>	
2 ECONOMIC IMPACT	
<i>COVID's Two Economies, The She-session</i>	
3 EQUITY AND JUSTICE	
<i>The Great Awakening, Needles and Institutional Mistrust</i>	
4 WORK AND EDUCATION	
<i>Home Not Alone, COVID Career Changes</i>	
5 AMERICAN LIFESTYLE	
<i>Adapting in America, The Betterment Boom, The Urban Exodus Bubble</i>	
6 MARKETPLACE	
<i>Under House Arrest, The Roaring 21s?, A Savings Dam About to Burst?, A New Syndrome: CV-PTSD, The Digital Gold Rush, Crypto-Currency Mania</i>	
7 BUSINESS	
<i>The Leadership Void, High Grades for Corporate Reputation, The Social Media Dilemma, Business Meets the Moment</i>	
3 Lessons from a Pandemic	35
<i>Lessons for Marketers</i>	

This report examines loss, resilience and emergence. The pandemic is remaking many aspects of American life that we are only now beginning to understand. From values and beliefs to routines and relationships, change is underway across the nation. A year's worth of data on our society reveals new priorities in how we choose to live our lives, where we want to live and work and how we choose to spend our time and money.

Companies, in trying to recover, adapt and evolve must understand the evolution of Americans, who are digitally accelerated, hyper-resourceful and ever-mindful. There will be new winners and losers in a transformed marketplace. But one thing is clear: conventional wisdom and assumptions no longer hold in a post-COVID America.

Background

In early March of 2020 as America was grasping the extent of the pandemic, [The Harris Poll COVID-19 tracker](#) began as a project to continuously monitor public sentiment through weekly polling to understand how the virus was reshaping life across the nation. As information in the early weeks was scant, we released our surveys unrestricted to the public, for the public good. Soon journalists, universities, healthcare institutions, businesses, think tanks and government agencies contacted us to explore our findings and to offer up new questions. All tabs, tables and trended data are published free on our site and now widely used for guidance on mask protocols, and vaccine acceptance among many other aspects of life amid COVID.

And as the months unfolded, we gained an even broader understanding of a myriad of ways in which COVID has dislocated ordinary American life. In tandem with [The Harvard CAAPS-Harris Poll](#), we studied economics, politics and our society's struggle with injustice and division. Each week we gathered highlights of data from our weekly tracker into [a newsletter briefing](#) published to over ten thousand businesses, individuals, journalists and opinion leaders. Today, we believe we have stood up the single largest comprehensive data set on life amid COVID. Our questionnaire is at one hundred pages and rising:

METHODOLOGY	
When	55 waves (March 15, 2020-March 15, 2021)
Who	114,435 (and counting) Americans interviewed on everything from pandemic streaming habits to impact on their relationships.
What	1,400+ total questions

Each survey was conducted online within the U.S. by The Harris Poll among a nationally representative sample of around 2,000 US. adults. Data was weighted to reflect the U.S. general public across age, gender, race/ethnicity, region, income and employment.

We are greatly indebted to our fantastic team who undertook this massive project. Together we offer this from our time on the watch of this extraordinary organization of social scientists who attempt to study society with the same dedication, tenacity and curiosity of our founder, Lou Harris.

For more information

[The Harris Poll COVID-19 Tracker](#) ↗

1 American Psyche

A Year of Fear

Hard to fathom, but in the early weeks of 2020, America was fixated on Iowa vote counting and the (first) impeachment. But as COVID-19 and its health and economic devastation swept across the country, denial turned into fear. Anxieties careened from PPE shortages to leaving the house. At the height of the pandemic, more than half of Americans (54%) were afraid of dying from the virus while (53%) feared losing their job. For months these two concerns intertwined like an existential choice: your job or your life.

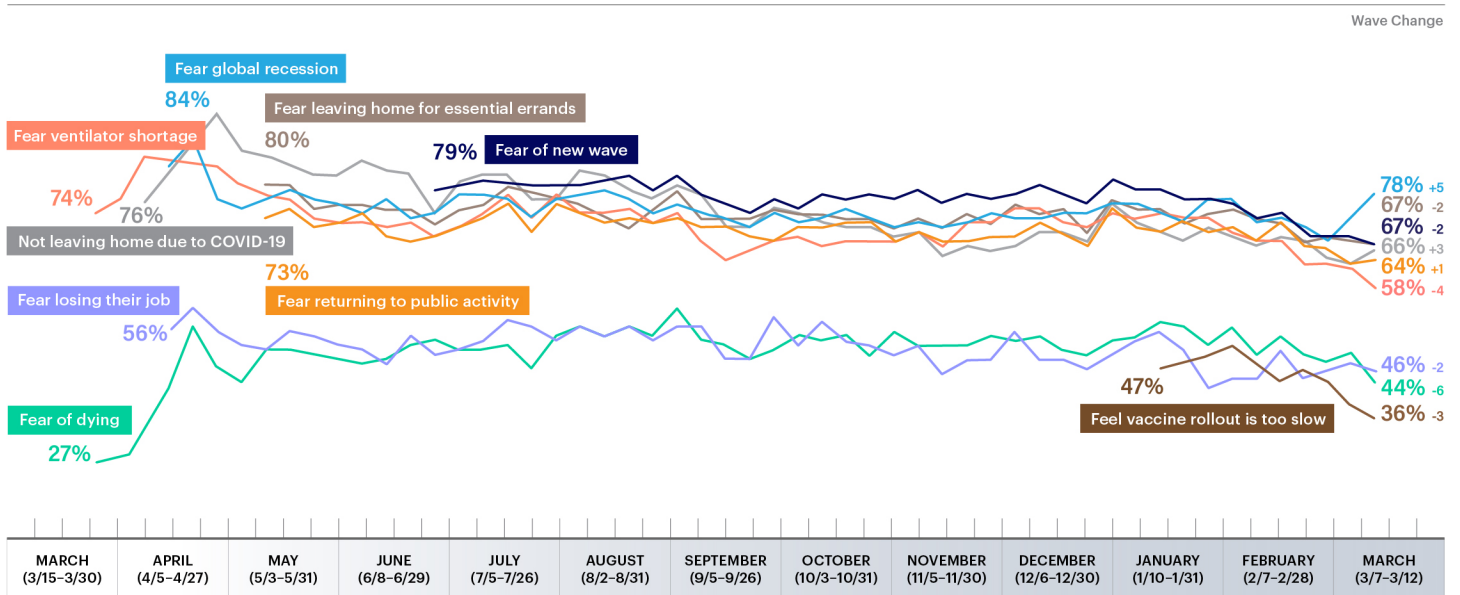
Only in the past month with vaccines rising and hospitalizations and deaths declining is fear abating. Notably, worries over healthcare shortages is (58%) today when it was (86%) on March 23rd. Concerns of a new wave of cases (67%) is down from (82%) on August 23rd. And fear of losing one's job (46%) has declined from its peak of (60%) on April 5th. We see the biggest slide among those who feared leaving the home from its highest at (95%) on April 3rd to (67%) today.

A Year of Fear Is Slowly Abating in American Society

54% thought national fear was irrational

Trended fear curves during COVID-19

68% now think national fear is sensible



Dislocation and Desire

Many Americans also endured great psychological trauma. The lockdowns, separation of loved ones, the loss of traditions and rituals that give purpose to lives were suddenly gone. Unmoored, three-quarters of Americans (75%) today miss seeing friends and family, (67%) miss in person celebrations like birthdays and graduations and (48%) miss going to church. Aching for connection is evident: Half of the country (50%) miss hugging friends and family, the same number in-person conversation, while (42%) feel the loss of being connected to others and (39%) hearing friends/family laugh. Perhaps it's no wonder that half of America (50%) feels lonely, (39%) overwhelmed and (38%) claustrophobic.

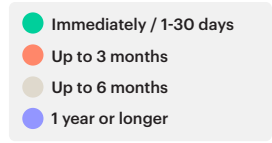
But now we are teetering on the tipping point of desire overtaking fear: For instance, resistance to returning to normal public activity (64%) now trails the desire for dining out at a restaurant (68%) while other wants like shopping in stores (61%) or going to sporting events (52%) are growing. Some are even willing to take more risks for a sense of normalcy. Americans who are confident to visit family and friends without a mask increased from (24%) on January 10th, 2021 to (31%) on February 28.

The Journey to Normal

In their return however, Americans are not crowding into bars or hosting large events. The majority (62%) feel comfortable or neutral on activities like drinks or dinner indoors or staying in a hotel (59%) but are uncomfortable attending a large concert (58%) or taking public transportation (54% uncomfortable). In daily life, Americans calculate wants with safety. In fact, (82%) believe "safety" has a broader definition now than it did just six months ago. The same number overwhelmingly support keeping an airline middle seat open. Half (50%) say proof of vaccine for admission would make them feel safe to attend a concert or sporting event.

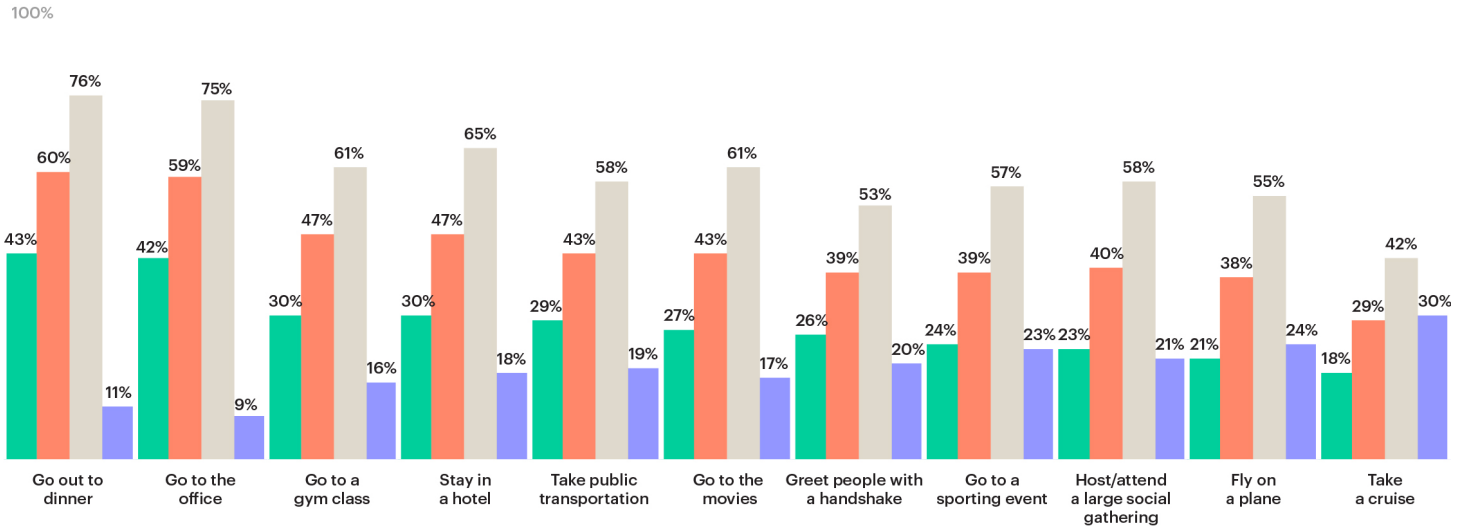
Across daily life, Americans tell us it will take them on average six months to return to normal, with some activities sooner than others:

Consumer Confidence Correlates with Distance and Familiarity



Once the government provides information that the spread of the virus is flattening how long will it take you to do each of the following?

(Six Months to Normalcy on Avg.)



Forbes Poll: Two-thirds of Americans won't travel for at least three months after COVID-19 subsides

An End in Sight?

Americans feel the tide is turning. For the first time in a year of our polling, nearly two-thirds (64%) say the worst is behind us — climbing 30-pts from (34%) on January 10th vs (38%) who say the worst is still ahead. A similar number (58%) say they can see the light at the end of the tunnel (vs 42%) who say the end is still too far away. This significant boost of hope is up from early December when (71%) said the worst is still ahead and only (29%) said the worst is behind us. This shift comes as signs of normalcy are finally appearing: just last week, the CDC issued long-awaited guidance advising vaccinated Americans may gather indoors in small groups but should still wear masks in public, a guidance that was informed by Harris Poll research and insights. And looking ahead, (45%) of Americans are confident we will return to normal summer 2021 with younger Americans most hopeful (50% Gen Z and 55% Millennials). If resiliency is the reward, let's look back and see how we got there.

2

Snapshots of Life Altered

1 HEALTH AND WELLNESS

Life Interrupted by Loss

On March 30th last year, nearly 1,400 Americans had lost their lives and less than a third (28%) predicted over 10,000 deaths from COVID. Fast forward to October, (82%) were concerned that deaths would rise past 250,000 and half (52%) said the pandemic is worse than they expected. In fact, the loss was twofold; on February 22nd, 2021, the U.S. surpassed 500,000 deaths. Today, nearly half (47%) say they've have had a close friend, family member, or loved one outside their household had COVID-19 and (20%) have a close friend, family member, or loved one passed away due to COVID-19 (highest among Black Americans at 25%).

Amid the daily wake of national grief, families spent holidays apart and traditions were put on hold; Americans were twice as likely to cook alone compared to last Thanksgiving, couples had to postpone weddings (27%), and students experienced college in their childhood bedroom (34%). Parents feared for their kids missing out on learning (41%) and (33%) said the pandemic made it challenging for kids to get ahead. In September, more than half (56%) said that their stress was higher than before the pandemic. [Our study with the American Psychological Association](#) found that most (78%) of Americans report the pandemic is a significant source of stress.

Today, 35% say they are more depressed since the start of the pandemic, with 31% saying that their stress about their own mental health is increasing (highest among Gen Z and Millennials, both at 40%)

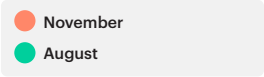
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The Kids Are Not Alright

The pandemic has had an outsized impact on the mental health of Gen Z, where more than two-thirds (72%) say “More people my age are suffering from mental health issues now compared to before COVID-19,” according to our research in consultation with the CDC. Today, three quarters of young people (75%) are stressed about being in limbo and the uncertainty of their future, (68%) are stressed they can’t socialize, (66%) fear missing out on key milestones, and without school events and traditions to anticipate, students say they are struggling to stay motivated (40%).

Another Harris study found that school-aged children are especially socially isolated, and according to their parents, one in seven kids has been quick to anger, has trouble concentrating, and has low energy. However, fewer parents say they’re seeking mental health treatment for their children or think treatments are effective. One in 10 (11%) children now have parents who say therapy is not very or not effective at all, and (10%) have parents who say drug treatment is not very effective or doing no good at all.

Gen Z are Struggling Mentally with Being in Limbo, Lack of Socialization, Career, FOMO



How much stress do each of the following cause you?
% A lot / Some stress



Source: Harris Poll, November 17-20, 2020
BASE: AMERICANS AGES 16-23 N=1,055 GEN Z WOMEN

78% of Gen Z say “We need new resources to address mental health issues during COVID-19 because current resources are not enough,” according to the Harris Poll / United Nation Foundation Girl Up 2020 Survey

[View The Harris Poll COVID-19 Tracker ↗](#)

Youth Dispel Mental Health Stigmas

Despite the swirling of emotions, where (53%) of Gen Z are overwhelmed and (52%) are lonely, the same amount say they are grateful (53%) and our data signals they're leading a new movement on mental health. According to our research with the United Nations Foundation Girl Up, seven in ten (70%) say “There is not enough awareness for how COVID-19 is affecting the mental health of people my age” and (75%) agree “We need new resources to address mental health issues during COVID-19 because current resources are not enough.” Our APA-Harris Poll data also shows this generation is nearly twenty points higher on average (27% vs 19%) in openly saying they've sought therapy or other mental health assistance vs. Boomers. But in lieu of new resources, Gen Z are coping by just trying to focus on school (44%), learning new hobbies (36%), and talking to their friends with what they are struggling with (27%).

ECONOMIC IMPACT— THE COVID ECONOMY

COVID's Two Economies

While (63%) of Americans say that the economic impact of COVID will have a bigger effect on them personally than the virus itself, not all hardship has been felt equally. Professionals able to work from home are in a different orbit from frontline workers. Meanwhile younger people and people of color are struggling far more than older, White Americans. Underneath this is the bedrock of systemic inequities and structural racism which COVID exposed along with our health. In our [February 2021 Harvard-CAAPs Harris Poll](#), the percentage of voters who said their financial situation is getting better (29%) is at its highest level since February 2020. Another (40%) say they are just as well off. Taken together, more than two-thirds of Americans feel stable or flush. But there remains over a fifth who say their situation is becoming worse (22%).

Among Americans who say they have missed (or will soon miss) a bill payment (37%) are Black and (28%) are Hispanic, while only (19%) are White. And (36%) of Black and (28%) of Hispanic Americans have sought out new or additional sources of income vs (26%) of White Americans. Additionally, (40%) of Black Americans have provided financial support for a family member while (32%) of Hispanic Americans say they accumulated more debt than normal — the largest of any demographic group.

Additionally, among Americans who stopped or cut back on savings, (38%) are Black while (23%) are White. Widening income inequality is also evident: Among higher income households (37% of those making over \$100k) say their income will be higher in 2021 than it was in 2020 (vs 27% of those making under \$50k), while (22% of those making under \$50k) say their income will be lower vs (17%) of those making over \$100k. Rising inequality is also correlated with a lack of trust in institutions: (80%) of those making over \$100k say they are likely to take the vaccine vs only (60%) of those making under \$50k.

Age is another economic divider. Younger people feel most at risk: (57%) of both Gen Z and Millennials still fear they could lose their job due to COVID vs (41%) of Gen X and (22%) of Boomers. Millennials were often the most severely setback by the financial impact of the pandemic: (38%) missed a rent/mortgage payment due to the pandemic vs. (27%) of Gen X. Older Millennials (33-40) meanwhile are being held back by their second financial crisis. Half (50%) of older Millennials say they don't have enough savings yet to afford a home, while (31%) say housing is too expensive where they live. One-third (33%) of older Millennials are looking for an affordable real estate market in which to relocate. Only (29%) say their disposable income is a lot or quite a bit.

And which end you are on in a K-shaped recovery depends in part on education and social status. Among older Millennials, (35%) with a college degree say they live paycheck to paycheck vs (58%) of those without a degree. Also, satisfaction with their current living situation is much higher among those college educated (94%) than those without a degree (74%).

The She-session

Though (81%) of both men and women say they were negatively impacted financially by the pandemic in some way, women were more severely impacted: (39%) of women who missed a rent/mortgage payment say it was a very severe setback for them (vs 26% of men) and (58%) of women who lost their income entirely say it was a very severe setback (vs 42%) of men. And while (72%) of men said the pandemic allowed them to save more money they normally would have, only (60%) of women were fortunate.

In addition, the pandemic has had an outsized impact on Gen Z women. In our study with the United Nations Foundation Girl Up, we found that (40%) of Gen Z women vs (33%) of Gen Z men have experienced “a gap in learning between school closures and start of virtual learning.” (25%) of women vs (19%) men say the pandemic has “caused me to fall behind with virtual learning because I have limited internet access.”

40% of Gen Z women vs 33% of Gen Z men have experienced “a gap in learning between school closures and start of virtual learning.” 25% of Gen Z women vs 19% Gen Z men say the pandemic has “caused me to fall behind with virtual learning because I have limited internet access,” according to The Harris Poll / United Nations Foundation Girl Up Survey

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Progress or Status Quo?

The police killing of George Floyd and other Black Americans sparked nationwide demonstrations and protests and renewed questions about systemic racism and injustice. But the answers are complex in a divided nation.

On one hand, progress seemed to be around the corner. After the killing of Michael Brown in Ferguson, MO (85%) of Black Americans said they felt Black Americans were discriminated against in the way they are treated by the police compared to only (55%) of White Americans — a 30-pt gap. When we asked the same question last June, the gap was cut in half with (84%) of Black Americans and (69%) of White Americans saying Black Americans face discrimination from the police. By this time, even (62%) of White Americans recognized that civilians should be involved in judging charges of misconduct.

We also found encouragement that (67%) of Black Americans feel that this moment in the racial equality movement “feels different” than it has in the past because there is more support from different groups of people than before (53%) and (43%) say “I feel for the first time that there is opportunity to really affect change.” For instance, the workplace, where (43%) of Black Americans reported that in their workplace efforts were being made to address inequality.

Meanwhile, Asian Americans suffered a new wave of injustice. Today, (68%) of Americans are concerned about the increase in hate/discrimination toward AAPI which is largely driven by Americans in urban areas (73%), Black Americans (77%), and BIPOC women (71%). What is more unsettling is that (40%) of Americans say they have seen little to no coverage of the subject.

The division and alienation is made worse when people retreat to their information echo chambers. Following the events at the Capitol Building on January 6th, only (16%) of Americans say they plan to be more open to friends or family with different political views and (15%) say they’ll try to broaden their sources of media. A failure of the public to reflect on what may have caused such an event may explain some of our hyper partisan politics and outrage that continue to threaten our pandemic response.

In fact, while we find strong support for the Black Lives Matter movement (65%) with more than (40%) said they had done some form of public activism recently, only (20%) support defunding the police. Instead (44%) support reforming police departments but keeping police department resources intact and (36%) want to ensure that police departments enforce law and order as they have been. In fact, according to the Harvard-Harris Poll, (55%) say the Black Lives Matter protests were more concerning than Capitol Building riots (45%).

Racial disparity in healthcare: while 65% of White Americans trust their doctor's advice on taking the vaccine, only 41% of Black Americans say the same

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Needles and Institutional Mistrust

The COVID-19 pandemic exposed institutional inequalities in the healthcare system, especially for minority communities who have endured centuries-long history of brutality from the Tuskegee syphilis experiments to Henrietta Lacks, and lack of access to quality health care and health insurance.

This is an important context to understand the current racial disparity of trust in the healthcare system with the vaccine rollout; for instance, while (65%) of White Americans trust their doctor's advice on taking the vaccine, only (41%) of Black Americans say the same. Black Americans are also less likely to trust the advice of pharmacists (25% to 42% of White Americans) and healthcare workers (33% to 51%). In addition, only (50%) of Black and (47%) of Hispanic Americans say they would be comfortable receiving the vaccine from their doctor's office vs a much higher number of White Americans (64%). Another hindrance is lack of communication that has resulted in Black Americans being less aware than White Americans (80% vs 69%) of who is eligible to get the vaccine in the early rollout."

Black Americans are more hesitant than White Americans to take the COVID-19 vaccine because they say they don't know what is in it (37% vs 29%); because they don't trust the government to determine it is safe (36% vs 29%); and because they don't know how the new type of vaccine works (27% vs 15%).

Earning the trust of Black Americans to take the vaccine will require engaging new sources of influence: (17%) say they trust the opinion of church leaders (vs 9% of White Americans). And influencers will play a major role: half (49%) of Black Americans under 30 say they are more likely to get the vaccine if LeBron James does first—an idea supported by a majority of the public: (57%) told us it is a good idea to allow NBA players early access to the vaccine in order to boost public confidence in it.

But vaccine skepticism spreads beyond the Black community and many Americans empathize with those who have concerns about the COVID-19 vaccine, saying their concerns are legitimate (55%). Concern over side effects is viewed as reasonable by three-quarters of Americans (73%) while (61%) say it is reasonable to not want to receive the vaccine due rushed development. Since the announcement of the Pfizer-BioNTech COVID-19 vaccine, the number of vaccine resisters has dropped considerably, but not universally. Since November 7th, 2020 the percentage of White Americans saying they are not likely to take the vaccine has declined 14-pts (from 39% to 25%), while hesitancy among Black Americans has declined only 8-pts (from 44% to 36%) and 7-pts among Hispanics (from 48% to 41%).

Many Americans empathize with those who have concerns about the COVID-19 vaccine, with 55% saying their concerns are legitimate

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Home Not Alone

Amid the stress of Zoom conference calls and home schooling, our data shows that remote workers are generally happier and without the constraints of overscheduling and work commutes, two-thirds (67%) say their lifestyle has gotten healthier since working from home and (41%) say work relationships are healthier. If they had to go back to the office, Americans would miss saving money by spending less on gas and lunches each week (42%), extra time in the mornings (38%) and being at home with their family (40%). As a result, (55%) of Americans now say “I found during COVID that I actually did not miss the office as much as I thought”.

All of this points to a permanent shift towards a blended office/remote work lifestyle as Americans would work from home permanently if it were up to them. Interestingly, Gen Z, constantly in search of community “IRL” (in real life), are more likely to want a hybrid of remote / office work (36% vs 28% of the general public).

WE COULD GET USED TO THIS: AMERICANS EMBRACE REMOTE WORK	
Preferred Work Model	
2 days in an office	3 days remote

Another byproduct is Americans are less constrained, resulting in what we call, “being un-calendared”. For instance, with no desks anchoring them to an office space, (74%) of Americans currently working remotely say they would consider taking a “workcation.” Mirroring this trend, **Airbnb reported** a surge in long-term rentals lasting 28 days or more, as well as a 3x increase in reviews mentioning remote work year-over-year in July 2020.

But remote work wasn’t so easy for everyone. Parents tasked with transitioning the home into an office and classroom made (56%) of parents stressed in juggling work and supporting kids while at home doing online learning. The costs of having to pay for more home supervision (44%); no one being able to watch the kids/supervise them (44%), and costs of preparing food which the school normally provides (34%) were all new stressors. Meanwhile students feared they would lose out on the ability to socialize with their peers and teachers (53%), not learn as well as in-person learning (46%), and not receive the extra services they require (47%).

In our research with the CDC, we found that (62%) of Gen Z say COVID had a negative impact on their education, with (54%) citing limited face-to-face interaction with teachers, (44%) limited places to study, and (22%) saying they fell behind due to limited internet access. Looking forward, Gen Z students say learning could be made more meaningful with designated study places (40%), better internet access (39%) and new ways to convene outside their bubble (33%).

While (80%) of Americans say it's important that teachers are vaccinated before any in-person classes resume at schools, schools are beginning to re-open across the nation even though vaccinations are still not widespread. Americans are divided at this moment: in early February 2021, an equal number of parents wanted entirely online and entirely in-person (both 29%) classes, while one-third (32%) wanted a hybrid approach; (10%) weren't sure.

COVID Career Changes

Many Americans sheltering in place reevaluated their work happiness and nearly a third (29%) say COVID has made them more interested in changing their career path. This is especially true for Millennials (34%) and BIPOC (37%) Black and Hispanic, 34% Asian vs 26% White Americans). Where are workers flocking to? The top five industries workers are interested in switching to are Information Technology (23%), Financial Services (22%), Healthcare (21%), Technology (20%), and Cannabis (18%).

In addition, a new [Fast Company/Harris Poll](#) found that (44%) of U.S. workers have actual plans in place to make the leap. The most likely candidates were those whose annual household income is between \$50,000 and \$75,000 with (59%) saying they've thought about making a switch.

62% of Gen Z say COVID had a negative impact on their education

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Adapting in America

What happens when nearly all of America is suddenly at home? At the outset, nearly four in ten (38%) of consumers bought more orange juice to boost immunity; (42%) more fresh vegetables and fruit vs fast food (17%). But some new habits were fads: (68%) initially said they were making more home cooked meals a month into the pandemic. By November nearly half (49%) said “I’m tired of cooking meals at home and wish there were more outdoor dining offerings” and (24%) were relying more heavily on food delivery apps. Other lifestyle changes became mainstays, like casual work from home attire where (51%) said they were more likely to work in their pajamas than get dressed, while in our recent survey with Morning Brew, (36%) told us they would miss not being able to wear athleisure, pajamas, sweats in the office.

Parents, trying to juggle it all, gave into streaming (54%) to preoccupy kids during the stay-at-home orders and more than 3 in 5 Americans (63%) said they were coping with stress by streaming. In fact, nearly a third of Americans (30%) bought a Netflix subscription in March alone. This equated to increases in daily streaming consumption across the board; (25%) admitted to watching up to two hours more than before and over a fifth (21%) of

54% of parents gave into streaming to preoccupy kids during the stay-at-home orders and more than 63% said they were coping with stress by streaming

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parents said they were watching more than four hours of additional content versus only (12%) of adults with no kids in the house.

Americans did tune out occasionally to pick up new hobbies (25%), and take neighborhood walks (36%). In fact, (69%) say they have an increased appreciation for the outdoors after the lockdown. And those who could afford it focused on renovating the home (32%) and bringing life inside. More than two-thirds (35%) said their ideal first date during the pandemic was a virtual one.

The Betterment Boom

Amid the struggle, Americans began a reappraisal of life and priorities. More than two-thirds (68%) said they felt thankful for their families, relationships and the sacrifices that the Americans have made for coronavirus. (We published a survey report on these essential workers called 'Everyday Heroes'). Two-thirds (67%) also feel more compassionate, saying things like "I am taking the time to check in with the people I care about, and "I'm appreciative to be around people I truly care about" (68%). These expressions of gratitude tracked nearly twenty points higher on average than feeling angry (43%) or annoyed (26%).

With more Americans working from home and staying in their pandemic pods, self-investment became a goal, from cooking classes to online courses to learning to play the guitar. From mid-March to September 2020, Coursera saw more than 50 million course enrollments, a 444% increase over the prior year.

Notably, one's own wellness includes others too: Americans report lifestyle changes to serve their own betterment and that of society; (76%) will continue to support charities they donated to this year due to the pandemic in the future, (43%) plan to stay more connected to friends and family after the pandemic, (42%) plan to stay more physically active. COVID also strengthened relationships: Nearly 6 in 10 (57%) said "my social network became smaller but more connected" and (62%) expect some friendships to become even closer after the pandemic. Nearly a third (33%) realized "Life's too short to spend time with people who don't add value to my life" and in reaction, nearly half (48%) "dropped friendships that were no longer serving me."

The Urban Exodus Bubble

At the outset of the pandemic, our data, featured in Axios, portended a mass retreat from urban life. Last spring, nearly four in ten (39%) of urbanites reported they were leaving the city for the suburbs. And nearly one-third (29%) were considering moving to a less densely populated area. Nearly seven months later our data with Bloomberg dispelled this trend, as the bulk of residents — big city, inner suburb and outer suburb — are happy with where they live, and want to stay put. In fact, a quarter (25%) say the pandemic actually makes them more likely to move to another urban area. Gen Z (ages 18-24), were even more likely to say they want to live in big cities (39%) than in suburbia (25%). It seems looking forward, don't short America's cities.

Under House Arrest

As households became the safest and only place to shelter, consumer spending during the pandemic was centered around equipping the home. Majorities spent more or the same relative to before COVID on internet and telecom (79%), groceries (73%), and home improvement (63%). This was illustrated on Black Friday, when one-third (33%) bought home goods like bedding and furniture; (31%) video games, (31%) new personal tech, (29%) kitchen products, and (27%) smart home devices. And looking ahead, (25%) of all Americans including (38%) of Millennials and (57%) of parents with young children say they would make improvements to their home (like better furniture) in order to prepare for something like this in the future.

Even after stay-at-home orders were lifted, consumers stayed close to home with the threat of COVID still at large, which in turn made the car the safest means of transportation for (90%) of Americans. And according to our [Q4 Consumer Report with the Out of Home Advertising Association](#), (65%) of Americans turned to the outdoors to stay safe (and sane); (40%) reported walking more, and (65%) trying to find safe outdoor activities to spend their time and (48%) have been trying to find new places to work from home

Consumers spent more or the same on internet and telecom 79%, groceries 73% and home improvement 63%

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or spend time outdoors, such as outdoor parks, outdoor coffee shops, or a friend's patio. This peaked consumer interest in other out-of-home experiences like outdoor dining (57%), drive-in and outdoor movies (55%), outdoor pop-up shops (52%), and food trucks/mobile pop up bars (49%).

In addition, social distancing taught consumers new things about how they like to socialize; (75%) said "during COVID social distancing I realized I preferred smaller social gatherings at home or at friends' place over going out to bars or restaurants," and (60%) "How much I loved entertaining at home in small pandemic pods." And looking forward to when restaurants and bars fully reopen and life goes back to normal, (72%) say they will miss "enjoying the comfort of my home while socializing," and (59%) will miss "the creative side of hosting / entertaining with friends," a sentiment held most strongly among Millennials (68%).

In fact, when we asked Americans what their ideal mix of going out vs staying in is as they think about their life moving forward, (48%) said "Mostly having friends over / going to a house party with friends and family" vs only (17%) who said "Mostly going out to bars, nightclubs or restaurants." Over a third (35%) said mix of both. Interestingly, these sentiments hold true across generations.

This does not indicate consumers will become hermits post-COVID. In fact (21%) have already resumed pre-pandemic levels of going out and there are benefits that come with going out to socialize like meeting new people (51%), especially true for Millennials (62%). Businesses that offer in-person services will have to think creatively how to blend the comfort of home entertaining with the connection that comes with going out.

The Roaring 21s?

We are approaching the tipping point from fear to desire as consumers make up for lost time. A recent [Harris Ad Age Poll](#) found many Americans gearing up for a spending spree with (30%) of HHs (households) \$100k+ said they plan to spend more compared to last spring, and (28%) said they plan to spend more compared to this winter. The current rollout of the COVID-19 vaccine has had an impact on spending: (53%) of consumers and (61%) of HHs over \$100k said the vaccine rollout has had at least "some influence" on how much they plan to spend come spring.

When it comes to where and how American will be spending their money this spring, [our survey](#) looks like a lot of it will happen in stores. Most consumers (62%) plan to shop in-store at least once a week this spring, and parents with kids at home are the most likely to be planning frequent in-store outings — (71%) of Americans with children under 18 said they'll be shopping in-store weekly. In our data, a majority (73%) of Americans are planning major purchases after things 'return to normal' — from booking a vacation (36%) to scooping up concert and sporting event tickets (27%) — an industry which (46%) of Americans say will see a boom post-COVID — to beauty and health products (22%) and new clothes for the office or going out (22%).

All of this has led to renewed optimism for the latter half of the year and

Americans are gearing up for a spending spree: 30% of HHs \$100k+ say they plan to spend more compared to last spring, and 28% say they plan to spend more compared to this winter”

[View The Harris Poll COVID-19 Tracker ↗](#)

intense competition to capture lost sales or defend share gained during lockdown. **The CMO Council** found two-thirds (65%) of members expect to increase marketing spend this year; only (10%) will reduce budgets and roughly a quarter do not plan to make any changes. As Ad Age reports, “The push spans several categories as brands try to make up for the lost sales of 2020.”

“Right now, every brand is figuring out how to either retain their newly won customers or gain back lost ones,” Mark Penn, Harris Poll Chairman said: “The race is on, and meanwhile, consumers have fundamentally changed—they’re simply not going back to pre-COVID brand expectations.”

He notes a push from brands looking for deepened digital experiences and new ways to approach performance media.

A Savings Dam About to Burst?

Another sign of encouragement in our data: two-thirds (66%) of Americans who remained employed said they were able to save more money than they otherwise would have. Even today nearly half (49%) of Americans plan to keep more money in savings, which could be the biggest drag on post-pandemic consumption.

But more likely what we are seeing is the “unattainable effect,” the increase in people’s intent to purchase due to a current inability to buy. There are sizable increases in the number of the people who want to go to sporting events (55%), see movies (52%), work from the office (34%), or shopping in store for clothes (61%).

“The increase in peoples’ intent to purchase is due to a current inability to buy,” said Cheryl Guerin EVP of Marketing at Mastercard in our Harris Poll CES panel.

In these numbers it’s clear sheltering not only created anxiety, but longing: Nearly three-quarters of Americans (74%) say they miss gathering with friends and family, while (44%) miss going to the gym – In many sectors we can see consumers becoming more active. For instance, even though currently the majority of Americans (52%) are still afraid of flying, there are nearly half (46%) who miss flying on a plane. Moreover, (53%) say they are currently planning a vacation to visit family and friends; (35%) are starting to plan and (16%) already have their next vacation booked. And given (69%) are optimistic everyone will be able to get a vaccine by the summer, (47%) of those planning vacations intend to do so this Summer. According to Mastercard-Harris Poll surveys, travel is the #1 splurge purchase North Americans are saving up for post-pandemic — and a majority imagine they will have more money to spend in 2021 on vacations adding that (60%) of Americans expect to have more money to spend in 2021 on vacations because of what they didn’t spend on vacations in 2020.

While 52% are still afraid of flying, there are nearly half 46% who miss flying on a plane

[View The Harris Poll COVID-19 Tracker ↗](#)

A New Syndrome: CV-PTSD

We might reach herd immunity soon, but Americans are scarred from the pandemic and will carry certain pandemic behaviors forward in their consumerism. We've noted the no contact lifestyle is becoming increasingly prevalent to minimize activities seen as unsanitary. Here consumers want 'frictionless' experiences applied to their health. We see this reflected in new shopping habits where (43%) say they are making fewer trips to the store and stock up on items as much as they can when they do go and (29%) prefer to shop at retailers that have thoughtfully planned the store traffic for COVID-19. Also, (28%) Gen Z/Millennials prefer to shop at stores that offer self-check out or app payments. We call this, "Safety as a customer journey."

Take for instance, usage of third-party food delivery services has grown during the pandemic. According to a recent [Ad Age-Harris Poll survey](#), (66%) of consumers said they order from currently, up from (41%) having ordered from one of the apps before the pandemic. In a Harris Poll study from July 2020, (15%) reported using food delivery apps at least weekly compared to (28%) now.

While the no contact lifestyle sure is ramping up, over half of consumers miss going to large scale events (58%). Looking ahead, to ensure consumer safety in returning to public activity, (63%) support businesses using a "vaccine passport" which they prove they received a COVID-19 vaccine or a recent negative COVID-19 test.

43% say they are making fewer trips to the store and stocking up on items as much as they can when they do go and 29% prefer to shop at retailers that have thoughtfully planned the store traffic for COVID-19

[View Out of Home Advertising Association - The Harris Poll Consumer Study](#) ↗

The Digital Gold Rush

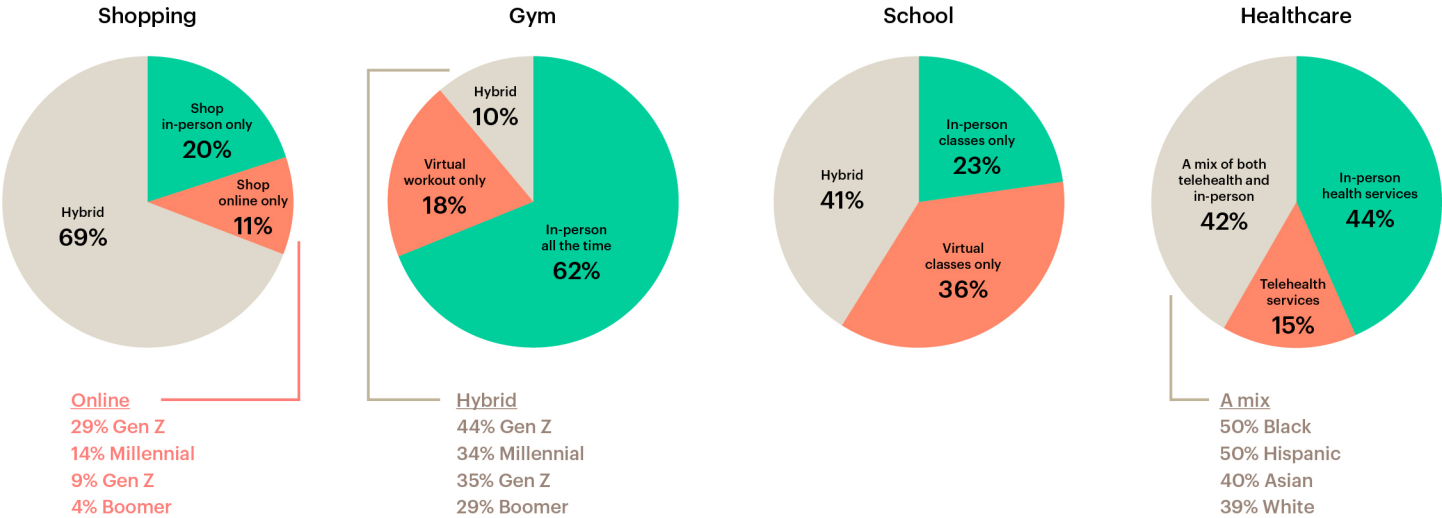
The pandemic forced consumers to be more reliant on and savvy in digital. While (47%) of Americans miss the experience of shopping in-store, (52%) are relying on customer service chatbots more or the same as they were before the pandemic as well as video reviews (63%). And surprisingly, over three-fourths (77%) say they are satisfied with online shopping. In addition, **our research with the Out of Home Advertising Association** found that since the pandemic began, (43%) reported they started using contactless transactions more, and (31%) started using QR codes.

Moving forward, Americans envision a mix of hybrid, in-person and online shopping. In person will be concentrated in higher-involvement purchases, such as luxury goods, cars, fine foods, browsing and social shopping occasions, while more pedestrian needs (staples, groceries, consumer goods) will keep being bought online. Interestingly, this chart shows Americans do miss working out in gyms, again speaking to the role that socialization plays in many categories. Marketers must understand if community is part of their physical brand’s physical offering. If not, their consumers might migrate more permanently online.

One example of pandemic migration is that many people used telehealth for the first time. Our data found the majority (65%) plan to continue to use the future. This potentially-permanent shift in how Americans have

Post-COVID, Consumers Want Hybrid of Digital and in Person Services

When the COVID-19 pandemic ends, which of the following would you prefer to do?



Source: Harris Poll COVID19 Tracker Wave 50, BASE: GENERAL PUBLIC W50 (n=2043)
DT04 When the COVID-19 pandemic ends, which of the following do you plan on doing?

traditionally received healthcare signals a disruption in the primary care doctor-patient relationship with on-demand telehealth services. Overall, over one-third (35%) of the general public would consider replacing primary care doctors for qualified doctors on-demand via telehealth. Gen Z and Millennials index even higher with half (50%) considering to replace their primary care doctor for telehealth. BIPOC communities, who (rightfully so) have higher degrees of mistrust in the traditional healthcare system, are also more likely to embrace telehealth as a replacement for their primary care doctor (52% Hispanic, 43% Black and 40% Asian vs only 32% of White Americans).

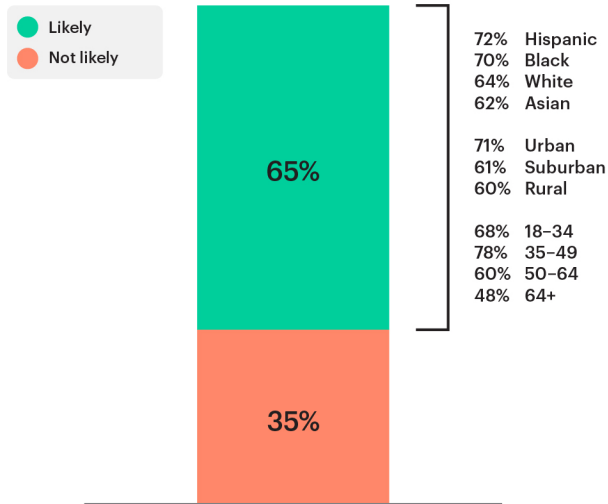
Primary care doctors aside, telehealth is setting out to digitally transform healthcare post-COVID. Even older generations are embracing digital healthcare services with nearly half (48%) of all Seniors 65+ saying they will likely use telehealth after the pandemic. Nearly half of all Americans say telehealth appointments are good for “Asking medical questions” (53%), “Reviewing lab test results” (48%) or “Get a sign-off for prescription refills” (46%), but only (34%) say they use it if they are actually sick and even less (15%) when their child is sick. This means the human interaction is still of utmost importance as (76%) say they would miss in-person visits if their primary care physician moved mostly to telehealth. Like many other services post-COVID, expect a hybrid approach to start, (42%) say they prefer to use ‘a mix of both telehealth and in-person’ to start.

35% of the general public would consider replacing primary care doctors for qualified doctors on-demand via telehealth

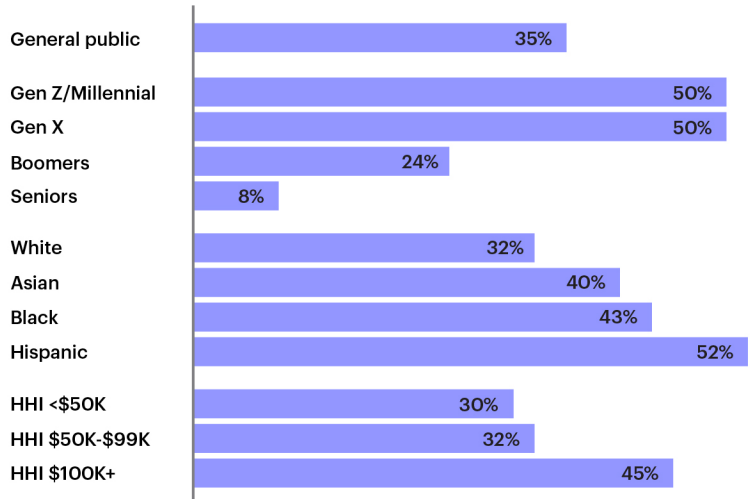
[View The Harris Poll COVID-19 Tracker ↗](#)

Telehealth Services Could Replace Primary Care Doctor for One-Third of Visits

How likely are you to continue using telehealth once the COVID-19 pandemic is over?
Of those who have ever used telehealth



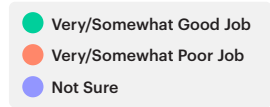
If you were able to conduct much of your regular medical appointments via telehealth or virtual services, would you ever consider getting rid of your primary care doctor?
% Yes



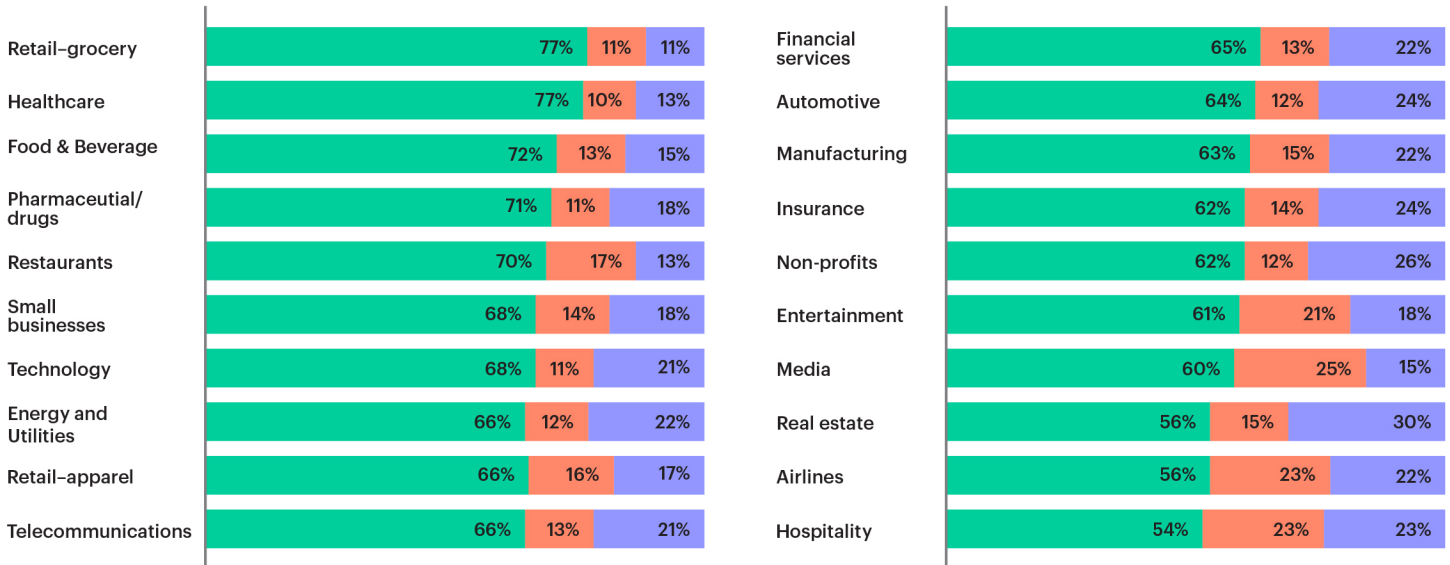
BASE: GENERAL PUBLIC W43 (n=2028)
TLH7 If you were able to conduct much of your regular medical appointments via telehealth or virtual services, would you ever consider getting rid of your primary care doctor?

Looking across industries, healthcare is among the top three industries rated for doing the best job at digitally adapting their products and services to the evolving needs of consumers (e.g., online shopping experience, digital customer service; use of contactless payment; in-app experience). Grocery comes in at the top with food and beverage coming in at the third likely due to how much consumers depended on these services during lockdown. The biggest opportunity is for businesses in the travel/hospitality, airlines, real estate industry who currently have lower ratings likely because consumers have yet to return in full. These industries should be prepared to adapt with new digital offerings that consumers tell us they are interested in such as tap-to-pay transactions (45%) and QR codes (41%).

Grocery, Healthcare, and Restaurants Doing the Best at Digitally Adapting to Consumer Needs



How good or poor of a job are the following industries doing as far as digitally adapting their products and services to the evolving needs of consumers (e.g., online shopping experience, digital customer service; use of contactless payment; in-app experience)?



BASE: GENERAL PUBLIC W50 (n=2043)
 DT01 How good or poor of a job are the following industries doing as far as digitally adapting their products and services to the evolving needs of consumers (e.g., online shopping experience, digital customer service; use of contactless payment; in-app experience)?

Crypto-Currency Mania

As markets crashed following lockdown orders at the onset of the COVID-19 pandemic, the price of Bitcoin sank to \$5,355 on March 15, 2020 and steadily climbed during the pandemic until hitting \$57,128 on February 21, 2021. Despite its historic run, our survey in partnership with Bloomberg showed Americans still don't understand how the cryptocurrency works: "From the public standpoint, it's not a cryptocurrency, it's a cryptic-currency," says John Gerzema, CEO of The Harris Poll. Only (39%) of people who have heard of cryptocurrencies like Bitcoin say they understand how they work, though (57%) say they are a legitimate form of payment (43% express doubts about its legitimacy as a form of payment.)

While only (22%) say they have a better opinion of companies that accept Bitcoin as a form of payment — (59%) say it has no impact on a company's image — companies moving into the cryptocurrency space bring credibility to cryptocurrencies and attract new customers: (59%) of those who own cryptocurrencies and (46%) of those who understand cryptocurrencies have a better opinion of such companies. Where is crypto headed? Three in 10 (29%) think crypto will be largely forgotten in 10 years, whereas (34%) believe it will become a standard form of payment.

The Leadership Void and CEO Opportunity

In a Harris Poll Study with The Milken Institute, citizens in twenty-two nations said there is a void in leadership as COVID-19 ravaged their countries and turned to businesses to solve the challenges presented by the pandemic. Three-fifths (61%) say companies were more reliable than the government in keeping the country running during the pandemic, while (55%) trust companies more than the government to find solutions to the pandemic. A strong majority (78%) say large companies are even more vital to their country's future than before COVID-19 given their resources.

With the added admiration for business comes extra responsibility: (82%) say “this is an opportunity for large companies to hit the ‘reset’ button and focus on doing right by their workers, customers, community and the environment.” Yet the reverse also is true: (72%) say “I will remember the companies that took missteps in their response to the issues related to the COVID-19 pandemic, economic security of their workforce, or racial injustice long after this is over.”

This unprecedented opportunity and double-edged sword also apply to CEOs. More than two-thirds (68%) of Americans say the U.S. needs busi-

61% say companies were more reliable than the government in keeping the country running during the pandemic, while 55% trust companies more than the government to find solutions to the pandemic

[View The Harris Poll COVID-19 Tracker ↗](#)

ness leaders now more than ever to help lead us out of the pandemic, racial justice, and other inequities. Americans also believe the CEO has the most impact on the reputation of the company (85%), its ethical standards (84%) and its diversity and inclusion (79%). Interestingly, people believe corporate leaders have more control over these outcomes than a company's stock price (75%).

CEOs also have growing awareness among the public: (63%) say they are more aware of business captains. In fact, (42%) of consumers say their decision to buy or use products/services is influenced by a company's CEO.

Yet a division is forming over whether CEOs should speak out on social and political issues, due to shifting generational and multi-cultural views. Boomers believe CEOs should prioritize listening to customers (50% versus 26% of Gen Z and Millennials) and shareholders (21%), while employees and communities matter more to younger generations (employees: 29% Gen Z versus 20% Boomers; communities: 16% Gen Z, 15% Millennials, 8% Boomers).

Meanwhile, (53%) of Millennials and (36%) of Gen Z say a CEO actively expressing political views is good for the company, while (61%) of Boomers and only (27%) of Millennials say it's bad for the company. Yet speaking out on issues should be worth the risk to others: (41%) of Black Americans versus (28%) of White Americans and (36%) of Millennials versus (24%) of Boomers say it is best for a company to take a stand on social issues even if it might offend some people.

Generational gap in speaking out: Boomers believe listening to customers should be a CEOs highest priority (50% vs 26% as likely as Gen Z and Millennials); Gen Z say CEOs should prioritize the voices of employees (29% vs 20% of Boomers)

[View The Harris Poll COVID-19 Tracker ↗](#)

High Grades for Corporate Reputation

In previous crises, business was viewed as part of the problem. In this crisis, business is clearly regarded as part of the solution. Corporate reputations surged across a variety of sectors, even in industries traditionally unpopular with consumers.

What's clear, however, is that the traditional drivers of corporate reputation — high-quality products and services, and delivering solid business results — are now simply the price of entry. What differentiates companies and reputations today is a company's character, all underpinned by trust.

As a case in point: prior to COVID-19, only one-third (32%) of Americans had a positive opinion of the pharmaceutical industry. After vaccines brought the end of the pandemic within reach, the number of Americans with a positive opinion nearly doubled to (62%). And just less than half (44%) of Americans say their opinion of the industry has improved since the start of the pandemic — because of the actions the pharma industry has taken. In fact, on our [Essential 100 ranking](#) from June 2020, we asked Americans which companies they viewed as being part of the solution: Johnson & Johnson ranked #3, and Pfizer ranked #8.

The Social Media Dilemma

While the pharmaceutical industry came to the rescue, this past year exacerbated social media's misinformation problem. A large majority of Americans (69%) say they do not trust social media, which is less trusted than Congress at (56%), the president (55%), and national media (52%). In our [Axios-Harris Poll 100](#) from July 2020, Twitter and Facebook were ranked #95 and #97, respectively, with poor reputations. The COVID-19 has highlighted a fundamental reputation problem: (57%) [do not trust information](#) about the COVID-19 vaccine they see on social media.

Most Americans (69%) want social media platforms to aggressively monitor information about COVID-19 vaccines on their platform and remove information they consider to be misleading. Distrust of social media isn't limited to the vaccine: (70%) want to see companies unite to urge Congress to regulate social media companies to limit misinformation and hate speech on their platforms, as well. Recent action by the companies is gaining modest approval among Americans: (37%) say social media companies are doing a good job combating misinformation following the January 2021 riots.

66% of Americans say companies could do a better job coordinating the logistics of the vaccine rollout than the government

[View The Harris Poll COVID-19 Tracker ↗](#)

Business Meets the Moment

As many grew frustrated with the initial slow rollout of the vaccine as covered in Axios, with (47%) saying it was moving too slowly, Americans looked again to business for answers. Those saying businesses are best prepared to distribute the COVID-19 vaccine increased from (13%) to (24%), while state governments remained unchanged (34%) and the percentage saying the federal government should lead declined from (30%) to (26%). Two-thirds (66%) of Americans say companies could do a better job coordinating the logistics of the vaccine rollout than the government. Also, (65%) want to see companies advertise to encourage consumers to take the vaccine, and (79%) say companies should provide their customers with reliable information about the COVID-19 vaccine.

3 Lessons from a Pandemic

A year into the pandemic and largely cut-off from society has offered an unprecedented time for most Americans to reflect. What did the past year teach us about ourselves? We put this question to Americans, who responded with their opinions and open-ended comments (listed here in bold). The importance of friends and family, determination to persevere, and a focus on personal and mental health were common themes.

A central area of agreement among Americans is that they found an inner-strength. One-third (32%) said, **“I am mentally and emotionally stronger than I thought I was,”** while a similar percentage (33%) said “I learned how to be more self-sufficient and independent.”

This build-back better mentality also applied to our relationships. The majority of Americans (53%) said **“I learned how to live better with more people in my household,”** while (45%) said, **“I became closer with my neighbors.”**

Gratitude is another common discovery. **“The pandemic taught me to be grateful for what we have and appreciate others more, especially those who do not have a choice to work as well as to have more empathy towards others who are struggling,”** said one person. Another put things into perspective as **“The things you think are important are not so important. Family, friends, and health are your top priorities.”**

This re-ordering of priorities was evident: (41%) said they discovered “the things in life that really matter to me.” Almost one-third (31%) of Americans said they learned “Who I could count on and trust.”

One-third of Americans say,
“I am mentally and emotionally
stronger than I thought I was”

53% say “I learned how to live better
with more people in my household,”
while 45% said, “I became closer with
my neighbors”

[View The Harris Poll COVID-19 Tracker ↗](#)

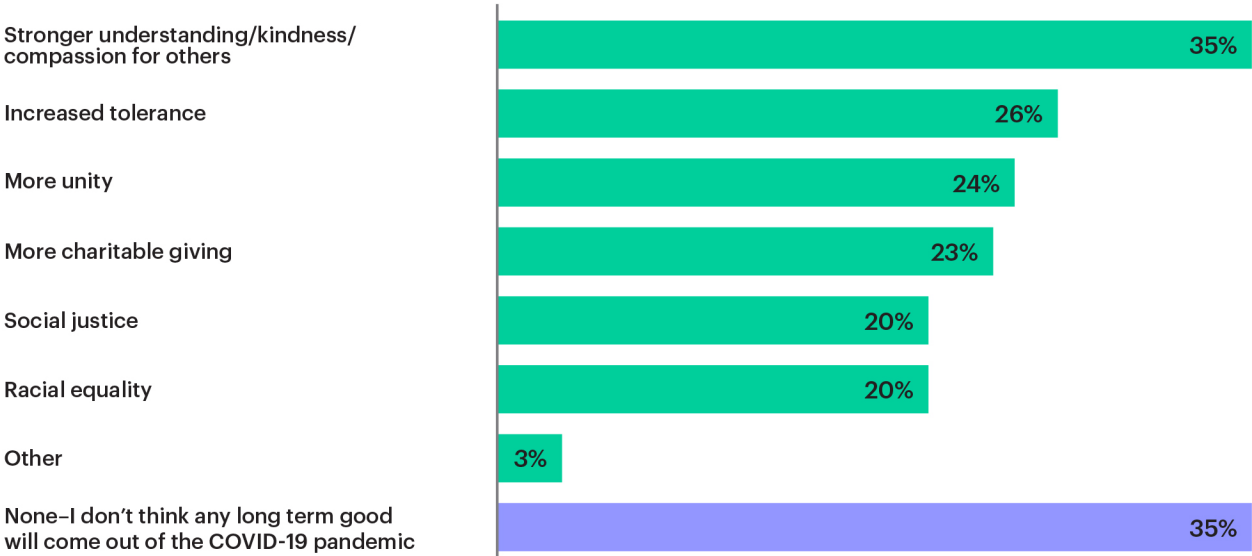
Amid the stress, Americans recalibrated: a near majority (46%) said “I learned how to enjoy the small things”. Almost one-third (31%) said that “it’s okay to do less when dealing with more.” The same number said “I learned how to be more mindful and self reflective.”

And did we have any regrets? One person laments on non-productive time: **“I wasted a lot of time on my phone scrolling social media or playing games. I could have been doing a million other things during that downtime that were far more rewarding.”** Another looks at the “lost year” they will never get back: **“Since I am older, it seems like a wasted year with not being able to travel and do things I want to do while I am still able.”**

Lastly, how would we do a pandemic differently next time? In a word, compassionately.

Most Americans Are Hopeful Some Long Term Good Will Come Out of the Pandemic

What, if any, long term good do you think will come out of the COVID-19 pandemic? Please select all that apply.



Source: Harris Poll COVID19 Tracker Wave 42, BASE: GENERAL PUBLIC W42 (n=2002)
CES7 What, if any, long term good do you think will come out of the COVID-19 pandemic?

Lessons for Marketers

1

Digital has gone from the next generation to the only generation: Americans of many kinds became maestros at hybrid-off-and-online living, shopping, working and entertaining. In many respects, digital has evolved not only for added convenience, but as a means to prioritize time, foster better life/work balance and make the most of our time off-line.

(77%) say they are satisfied with online shopping, (64%) say COVID showed them how easy it is and that it has “helped make shopping more frictionless” (58%).

2

Brand marketing was eclipsed by performance marketing during the pandemic: Instead of being driven into stores by brand messages during the pandemic, consumers became sophisticate online-shoppers.

While (64%) miss shopping in stores, (36%) of consumers say they are relying more on online reviews from company websites, (33%) on online reviews on forums/social media, (30%) on articles written about the product, (29%) on video reviews, and (19%) on customer service chatbots.

3

Every company and brand must re-think its relevance, customers, and offerings for the post-pandemic marketplace; one where assumptions based on 2019 may no longer hold.

“Right now, every brand is figuring out how to either retain their newly won customers or gain back lost ones,” Mark Penn, MDC/Stagwell CEO and Harris Poll Chairman said: “The race is on, and meanwhile, consumers have fundamentally changed—they’re simply not going back to pre-COVID brand expectations.

4

The lingering psychological effects of COVID-19 will shape new consumer behaviors and values well past the pandemic itself. Touchless-frictionless commerce isn't just about convenience but health and wellness as Americans cautiously re-enter the marketplace.

(82%) believe “safety” has a broader definition now than it did just six months ago—(48%) don't want to touch cash anymore

(43%) started using contactless transactions more, and (28%) Gen Z/Millennials prefer to shop at stores that offer self-check out or app payments.

5

Tech schizophrenia: Institutional distrust and misinformation are amplifying division forces a nation to confront 'good and bad tech.' The optics of brand safety in an ever-divided nation will become an even greater challenge for marketers to justify their plans on platforms that don't foster healthy community interaction.

(69%) do not trust social media, higher than Congress (56% distrust); (70%) want them regulated



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