

COVID-19 CONSUMER RESEARCH EXECUTIVE SUMMARIES PART 1

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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 120

WAVE 120 INTRODUCTION

The following research was conducted between **September 30 - October 2, 2022** by The Harris Poll. Fielded among a nationally representative sample of **1,998** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

CASH-STRAPPED SMBS LOOK AWAY FROM TRADITIONAL BANKS: UNIT-HARRIS POLL

Introduction:

In a new [report with Unit](#), traditional banks aren't working for America's small businesses amid rising interest rates and lack of access to capital.

- **America's small businesses worry over the economic climate:** (77%) of small-business owners are concerned about the **impact of inflation** on their businesses, with nearly as many (71%) worried about the potential impact of an economic downturn.
- As such, nearly two-thirds (62%) of SMBs say they are **seeking additional financing**, and (68%) say they **need faster access to funds** – especially as over a third (37%) are **worried about running out of cash** in the next year if they can't get access soon.
- **The DMV diss:** Nearly a third (31%) say they would rather wait in line at the DMV than apply for a loan from a traditional bank.

"I would rather _____ than apply for a loan from a traditional bank."



31%

"Wait in line at the DMV"



22%

"Sit in bumper-to-bumper traffic"



20%

"Assemble Ikea furniture"



18%

"Plunge a toilet"

- **SMBs are looking for a Bank of Amazon:** (71%) of small-business owners believe they **should be able to get a business loan as quickly as they can order something online**.
- And (84%) would be open to getting financial services from companies other than traditional banks – like technology companies, e-commerce platforms, and business software tools.
- **Small silver lining:** Nearly two-thirds say that the current economic environment also creates new opportunities for their businesses.

Implication:

Given the rise of retail investing and crypto, where individuals found ways to route around traditional financial institutions, there is a considerable market opportunity for tech companies to hone in on SMB owners who are dissatisfied with their current banking solutions by offering better financing, faster payments, and consolidation of financial management to one platform. And there's no shortage of a marketplace. America's small [businesses account for 44% of U.S economic activity](#), according to SBA.gov.

Section:

02

Topic:

THE MILLENNIAL SANDWICH: FORTUNE-HARRIS POLL

Introduction:

In our new Harris study [with Fortune](#), one-third (32%) of Millennials (ages 26-41) are raising children under 18 while regularly caring for their aging parents in some capacity. But that's not the only challenge they are contending with:

- Three-quarters of Millennials with minor children (77%) worry about **affording their living expenses**, and over half of those employed chafe over possibly **losing their job** (57% v. gen pop: 45%).
- And two-thirds of Millennial parents with minor children fret over **their retirement savings** (65%) and their short-term savings (63%).
- **Dreams deferred:** Just over half (59%) of Millennials caring for minor children believe that the overall American Dream is attainable today.
- **But my kids will be better off:** Millennials with minor children (86%) believe their child(ren) 's future income and wealth will be better than their own.

Implication:

"In our (Harris) polling, the number of Americans in the sandwich generation will likely increase in the coming years, especially as millennials enter this stage of life. Fortune's survey found that seven in 10 Americans with at least one living parent say they expect to help their aging parents regularly in the future. That sentiment jumps to 88% among millennials", says FORTUNE.

Section:

03

Topic:

NO IFS, ANDS, OR PUTTS – GOLF GETS A REBRAND: MARKETING BREW-HARRIS POLL

Introduction:

It's been more than forty years since the release of Caddyshack. Since then, golf has looked much different than it did, with many modern-era golf brands looking to attract those who want novel experiences, according to our latest survey [with Marketing Brew](#).

- **Less pale, stale, male:** Even while the game of golf continues to lean towards wealthier and male Americans (37%, 33%, respectively), nearly 7 in 10 Americans (69%) believe the sport is becoming **more diverse** and **more inclusive** (66%).
- **Speed it up, make it cheaper:** Among Americans who don't golf, a third (35%) say they don't because it's too dull and slow of a game, (33%) say it's too expensive to play, and one in five (21%) say the game is too time-consuming.
- **Disruptors hit the fairway:** Golf brands like **Topgolf** and **Five Iron** are trying to make the game seem less stuffy, **Eastside Golf** is working to inspire culture and promote diversity in the game, and Puffingtons is looking to combine cannabis and golf.
- And don't forget the new **Saudi LIV Golf League**, where fans are encouraged to act like they're at a Foo Fighters concert.

Implication:

"While there's still work ahead, the sport is attracting new players, thanks in part to emerging golf brands that are focusing more on creating fun, accessible experiences than perpetuating old-fashioned trends like plaid knickers or pom-pom hats" (Marketing Brew).

Section:

04

Topic:

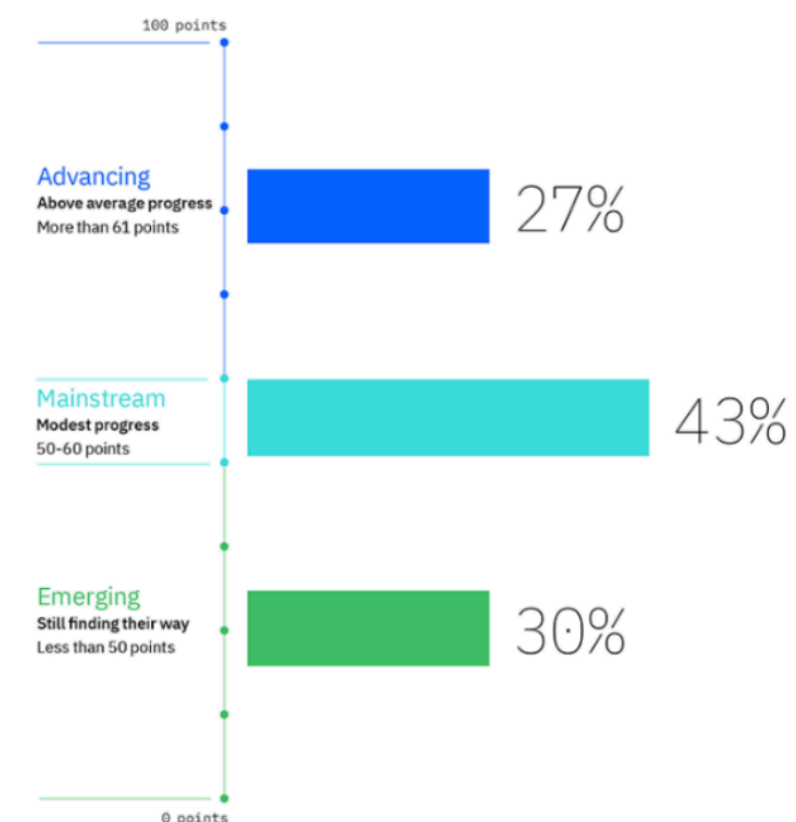
THE STATE OF THE CLOUD: IBM-HARRIS POLL

Introduction:

We partnered with IBM and the IBM Institute for Business Value on creating [its IBM Transformation Index: State of Cloud](#), in which global business leaders found that hybrid cloud is critical to modernization, yet security, skills, and compliance concerns impede success.

- **Context:** The index is based on our **research with more than 3,000 IT and business decision-makers in 12 countries and 23 industries**, revealing the areas where teams face the most significant challenges and opportunities.
- A definitive (86%) of organizations say they **have proven at least the initial benefits of cloud**, but one company's cloud journey may not be another's:

Where are most enterprises on their cloud journey?



- **A hybrid cloud is the model of choice:** (56%) of respondents have already adopted a hybrid cloud, and (80%) are moving workloads from the public cloud back to some form of private infrastructure.
- **Talent shortages are creating a gap in cloud security/strategy:** About (70%) of executives say their teams lack the skills to be proficient in the cloud.

Implication:

Moving forward, there's no more "easy button" as many enterprises have exhausted the cloud's low-hanging fruit and must move to more complex cloud endeavors even as they lack the in-house skills to do so. Action plans will vary from company to company. Still, a few first moves commonly apply: deep cloud, avoiding bolt-ons, creating more seats at the table, and insisting on zero trust security.



WAVE 119

WAVE 119 INTRODUCTION

The following research was conducted between **September 23 - 25, 2022** by The Harris Poll. Fielded among a nationally representative sample of **1,992** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

AMERICA'S TEENS HAVE IDEAS ON SUICIDE PREVENTION: CVS HEALTH-HARRIS POLL NATIONAL HEALTH PROJECT

Introduction:

New data from the [CVS Health - Harris Poll National Health Project](#) reveals that teens have a unique perspective on the suicide crisis affecting their generation that is different and more nuanced than the more prominent U.S. adult population. And their insights are critical to helping understand the catalysts and crisis points, which could help prevention.

- **Social isolation:** More than any other age group, two-thirds (66%) of American teens (13-17) point to the **loss of social relationships during the pandemic** as a significant contributor to rising teen suicide rates among their generation (v. gen pop 18+: 58%).
- **Strife in their social and home life environments:** Teens are also more likely to report increased relationship problems (59%) and family financial struggles (58%) (v. gen pop 18+: 46%, 47%, respectively)

- **Bottling up:** While nearly (75%) of teens say they have people in their social circle they could talk to about their mental health, a third (34%) say they don't talk to anyone about their mental health.
- **Failure to communicate:** Close to half of teens (44%) report that no one has ever reached out to them to discuss suicide and suicide prevention, and nearly 6 in 10 (59%) teens say they have never talked about suicide and suicide prevention with their parents.
- **Friends in need:** Over half (54%) of teens report knowing people in their social circle who are struggling with mental health (v. gen pop (18+): 49%), yet close to half of teens (44%) also say that no one has ever reached out to them to discuss suicide and suicide prevention.
- **A generation interrupted:** Harris's research with The CDC on [teenage mental health during the pandemic](#) shows the profound, structural dislocations in their lives from identity to education, economics, and more.
- **But teens are breaking the stigma in seeking mental health:** Our long-standing [APA/Harris Poll Stress in America Report](#) reveals that teens are the generational cohort most likely to say they are in therapy and see it differently than older Americans — as a proactive means of health and wellness.

Implication:

"We want to be laser-focused on intervening with this age group and customizing the kinds of interventions that are going to be effective in changing this trajectory," says Flora Vivaldo, head of clinical strategic initiatives at Aetna Behavioral Health, such as proactive outreach of support and resources along with [youth-nominated support teams](#).

Section:

02

Topic:

HYBRID WORK IS HAPPY WORK

Introduction:

Does Gene in accounting get on your nerves more than usual? It might have to do with where you work. New Harris Poll data finds that hybrid workers are the most tolerant of their coworkers:

- While (58%) of full-time office and (57%) of fully remote workers say **their coworkers are annoying**, less than half of hybrid workers think so (47%). Similarly, (58%) of full-time office and (56%) of fully remote workers think their **coworkers are lazy**, yet only (45%) of hybrid workers say the same.
- **Similarly, both full-time office and remote employees were more likely to report having coworkers that are incompetent (53%, 50%) and bad at their job (53%, 49%) compared to their hybrid peers (46%, 39%, respectively).**
- While half of American workers (51%) say they have coworkers who are hard to work with, more than two-thirds say they **genuinely like most or all their coworkers (67%)**.
- **American workers split into thirds on where they prefer to work:** A third (34%) want to work from home permanently (-2%-pts Jan' 22); another third (33%) in the office permanently (+2%-pts), and the last third (33%) want to split time between the office and home (unchanged from Jan).
- **Women and BIPOC workers favor remote work:** Employed women (38%) and BIPOC women (48%) want to work remotely, as do Black employees (42%).
- Gen X prefers remote work (41%), Gen Z the office (44%), and Millennials hybrid (39%). (See our Bloomberg story on [Summer Interns in empty U.S. offices](#)).

Implication:

Look, we like to complain about our office mates. More than half of all American employees say they have annoying (55%), lazy (55%), and even weird and awkward (54%) colleagues. But hybrid working seems to bring more perspective or at least a change of pace which allows us to focus less on what bothers us and more on what to get done.

Section:

03

Topic:

PURPOSE LEADS TO RETENTION: KUMANU-HARRIS POLL; GOOGLE CLOUD-HARRIS POLL

Introduction:

In a tight labor market, purpose in company values, principles, and ethics affects retaining talent and customer bases, according to multiple new Harris surveys.

- A Kumanu Harris Poll [featured in Forbes](#) reports that American employees are two times more likely to stay at a purpose-driven organization and four times more likely to be more engaged at work.
- Similarly, our [PURPOSE Under Pressure](#) report finds that (86%) of employees said **having "meaning" in their work is more important than ever before** – and (84%) even say they would only work at Purpose-driven companies and brands.
- Purpose retains customers as well: In partnership with Google Cloud, [featured in Forbes](#), we found that (82%) of shoppers want a brand's value to align with their own and that three-quarters of shoppers (75%) have parted with brands over value conflicts.

Implication:

In our America This Week podcast, Libby and I have voiced a strong belief that HR is an untapped source of innovation in the twenty-first-century corporation. Think about it: What if human resources were elevated to the c-suite, becoming both a listener and catalyst of talent and, in turn, a connector of personal esteem and identity at work with the stated purpose and values of an organization? All these studies say the same thing: HR is needed now more than ever, not as a tactic but as a central strategy to a company's plan for growth.

Section:

04

Topic:

UPSKILLING IS ESCAPING:

Introduction:

While most (72%) of American workers are satisfied with their job, it doesn't mean that people aren't actively looking to invest in themselves to move to bigger and brighter positions. But new Harris data shows that learning more skills and knowledge is often the first step among many would-be-job switchers.

- Two-thirds of employees (65%) say the main reason they are **learning new skills** and doing **professional development** is to **advance their careers or switch positions**; especially so among Millennials (74%), Black (71%), and Hispanics: (71%) professionals.
- At the same time, six in ten (60%) employees say they are **exploring new opportunities** (Black: 76%, Millennials: 72%, Hispanic: 65%),
- And (45%) say they actively seek **a new job** (Hispanic: 58%, Black: 53%, Millennials: 55%, Gen Z: 53%).
- **The quiet quit continues**: Close to half of employees (45%) agree they have **stopped going above and beyond** at their companies (Millennials: 55%, Gen Z: 53%).
- **Wages are falling behind expenses**: Over two-thirds (69%) report their salary **isn't keeping up with inflation**, and they could **readily seek a job with higher pay** (62%).

Implication:

What's driving the learn and leap trend? Risk management, for one: Four in ten Americans (42%) are anxious about losing their jobs (+4pts from last week). Meanwhile, in our data, employers have been **criticized for not keeping promises** to workers on training and development. As a result, American corporations need to hit the 're-set' button when investing in their workers and designing more customized pathways for talent to develop and thrive without leaving the hive.



WAVE 118

WAVE 118 INTRODUCTION

The following research was conducted between **September 16 - 18, 2022** by The Harris Poll. Fielded among a nationally representative sample of **1,923** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

GEN Z ARE DIRTY, ROTTEN, STREAMING STEALERS

Introduction:

According to this weekend's Harris data, one-third (33%) of Americans are mooching off of family and friends for their streaming logins – which would be around 100 million individuals streaming content under someone else's account. But Gen Z (ages 10-25) take password grifting to a new level:

- **Young streaming criminals:** Nearly two-thirds (63%) of Gen Z **use family and friends' streaming logins to watch content** (v. Millennials: 45%, Gen X: 30%, Boomers: 16%).
- **Gen Z also steal passwords across most platforms:** (62%) of Gen Z also admit using **one to five of their family's or friends' streaming logins** (v. gen pop: 39%) – and among those Gen Z'ers using family's and friends' logins, they, on average, are using two logins.
- **Gen Z'ers are even streaming on ex's accounts:** It seems login pilfering is the modern equivalent of not returning your ex's vinyl records. Close to 4 in 10 (37%) Gen Z report **having used an ex-partner's streaming login after a break-up** (few weeks: 12%, few months: 13%), with over a tenth (12%) saying they still do currently.

Implication:

While Harris Poll data has previously found Gen Z to be both fiscally responsible and driven by values and ethics, it may not come as a surprise that they are sneaking on others' logins, as three-quarters of Gen Z Americans (79%) are worried over affording their living expenses and half (42%) report feeling less confident in spending money overall this month. Tough times seem to bring tough trade-offs.

Section:

02

Topic:

SAY GOODBYE TO YOUR FRIENDS, THE ALGORITHM IS HERE TO STAY

Introduction:

While Boomers would prefer to keep their friends and family in their social media feeds, Gen Z is leading us into a new world of social media algorithms, according to our recent polling this week.

- Gen Z social media users say they would rather see the **greater world's content** when active on social media instead of their own family's and friends' content (56% v. Gen X: 42%, Boomer: 31%).
- Two-thirds of Gen Z (65%) say that **social media algorithms have increased the content they like to consume and be entertained by** (v. Gen X: 48%, Boomers: 25%).
- Gen Z believes that algorithms have the potential to **share more perspectives** (57%, Boomers: 23%), while Boomers are more fearful about algorithms spreading misinformation (77% v. Gen Z: 43%).
- Gen Z is more likely to think **TikTok** will set the vision for the future of social media (58% v. Boomer: 42%), while Boomers think **Instagram** will set the vision (58% v. Gen Z: 42%).

Implication:

Algorithm tweaking has outraged everyone, including Kim Kardashian, who posted "[Make Instagram, Instagram again](#) (stop trying to be TikTok, I just want to see cute photos of my friends)". But Kim's a Millennial, and Gen Z are using social for search and discovery, not just party pics. This goes to the heart of a changing value-system and style of learning focused on video-based education and micro-peer network credibility for news information.



Make sure to check out our [America This Week: From The Harris Poll](#) podcast this Friday, where Libby Rodney and I will dive into how Gen Z will shape future iterations of social media.

Section:

03

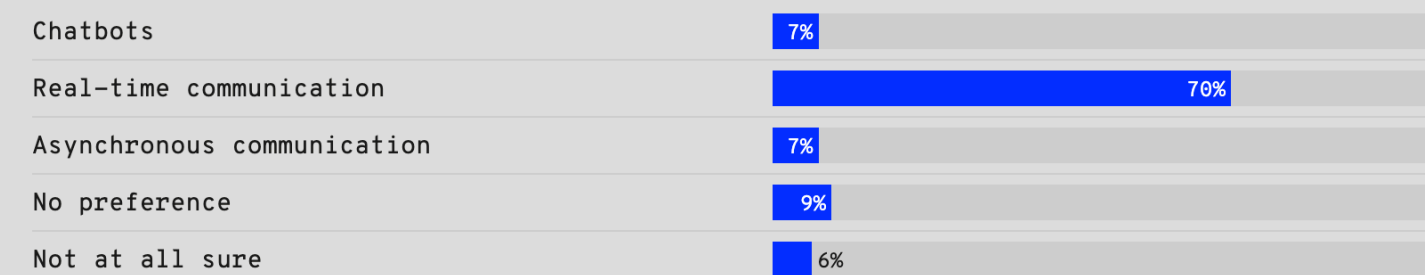
Topic:

OPERATOR PLEASE, I WANT TO TALK TO SOMEONE: PROTOCOL- HARRIS POLL

Introduction:

In our latest survey [with Protocol](#), we asked Americans what they want from their experiences as customers: talking to someone on the other end of the phone.

Which of the following tools or services would you prefer to use when reaching out to a company for assistance?



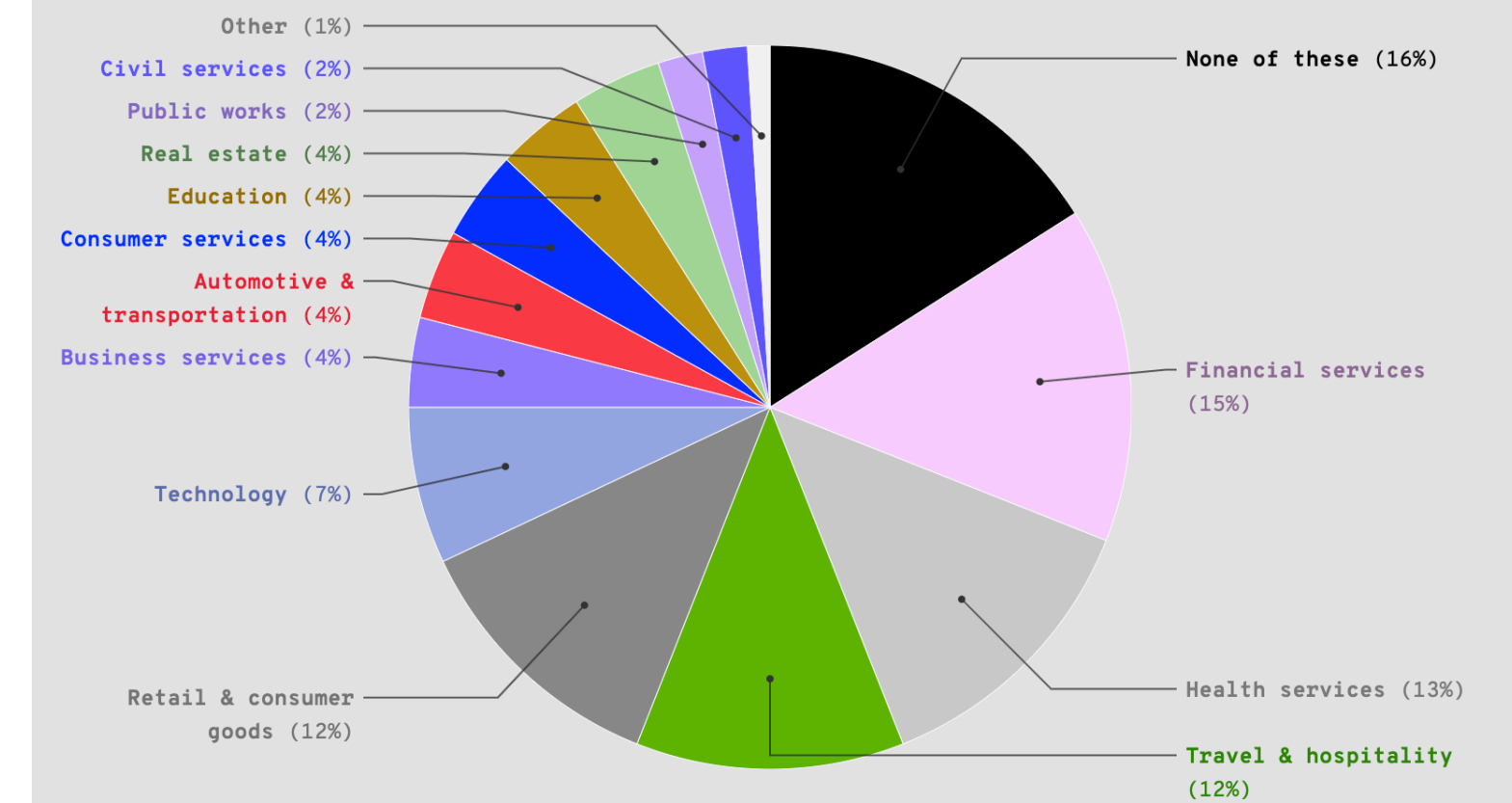
Source: Harris Poll • Created with [Datawrapper](#)

protocol

- A large majority of customers (70%) said they still **prefer real-time communication** over chatbots and asynchronous communication (7%).

- When asked which factors contributed to a good customer experience, two-thirds (67%) said being **able to speak to a customer service representative**. In contrast, just a fifth (20%) chose chatbots and automated customer assistance systems (16%).
- (50%) feel that their customer service experiences have not changed compared to the start of the pandemic, yet more/over a quarter (27%) say it's gotten worse (v. better: 21%).

Which of the following industries do you believe provides the best customer service experience?



Source: Harris Poll • Created with [Datawrapper](#)

protocol

Implication:

“But if you’re a CXO reading this who just invested in a ton of automation technology, don’t panic just yet. Hope lives with the next generation. Our findings revealed that adults between the ages of 18 and 25 under indexed on citing the availability of customer service agents as a contributing factor to good customer service. Less than half (45%) cited this, compared to (67%) of all U.S. adults and (77%) of those ages 50 and older. These results indicate that Gen Z will be much more amenable to CX tech tools and may even be ready to say goodbye to the customer service agent — or at least the human version”. (Protocol)

Section:

04

Topic:

BOOMING MARKET FOR TEMPORARY WORKERS: EXPRESS EMPLOYMENT PROFESSIONALS- HARRIS POLL

Introduction:

Even with a cooling economy, hiring efforts in the U.S. continue to climb as hiring decision-makers look to fill empty positions, as we found in a new Harris Poll [with Express Employment Professionals](#):

- **Open positions skew to middle management/entry level.** Those hiring told us that mid-level (55%) and entry-level (52%) open positions are most needed, with just around three in ten companies planning to hire senior-level employees (31%), individual contributors (26%), and C-suite executives (20%).
- U.S. hiring decision-makers will **turn to recent grads**, as more than half (51%) say their company plans to hire applicants from this group.
- **Yet, given the current labor shortage, some companies may consider more temporary hires:** A quarter of hiring managers (24%) report their plans to hire seasonal, temporary, or contract workers – an increase compared to 2021 (20%).

Implication:

"Today's workers are searching for flexibility, and with the severe skilled worker shortage, these assignments allow individuals opportunities to gain experience in various environments," Express Employment International CEO Bill Stoller said. "These shorter working stints can often lead to permanent employment, creating the perfect solution for today's tight labor market."

Section:

05

Topic:

SPENDING IS STEADY/EARLIER AS AMERICANS PREP FOR HOLIDAY SHOPPING: ROKU-HARRIS POLL

Introduction:

According to our latest Harris Poll Weekly Tracker data and a [recent survey with Roku](#), even in midst of record inflation, Americans are preparing for the holiday shopping season by saving now.

- We found over three-quarters of Americans (78%) report prioritizing more on **saving and staying within their budget** because of rising inflation rather than spending their money typically (22%).
- Close to half (44%) even reported **spending less money overall this month** compared to last, especially on big-ticket purchases (less: 48%).
- Yet despite inflation this holiday season, **Americans plan to spend an average of \$993 on holiday gifts, a (6%) increase from 2021.**
- And more than half of the holiday shoppers (56%) either **started or will start saving earlier** this year to prepare for the holiday season, including (70%) of Millennials.

Implication:

"We see that holiday shoppers are not only spending more time streaming content but also looking up brand or product reviews after seeing an ad at record rates. This offers brands the opportunity to differentiate and engage with their audiences in ways that don't exist on traditional TV," said Connie Xu, Director of Brand Strategy at The Harris Poll.

Section:

06

Topic:

FINDING COMMON GROUND ON STUDENT LOAN DEBT: NEW YORK DAILY NEWS-HARRIS POLL

Introduction:

According to our co-CEO Will Johnson, in his [latest op-ed for New York Daily News](#), nearly three-quarters of Americans say that the country's \$1.62 trillion in outstanding student loans qualifies as a crisis – but the closest thing to philosophy the public displays when it comes to addressing that crisis is informed self-interest.

(54%) of the public supports the Administration's plan to forgive up to \$20,000 in federal loans, halving the minimum monthly payment from 10 to 5 percent (68%), and extending the COVID-era moratorium on loan payments through year's end (63%).

- **There is a healthy element of self-interest at work:** Nearly four in five current loan-holders support the debt-forgiveness, yet, the figure drops to (54%) among those who no longer have loans.
- **But self-interest can lead to contradictory and even incoherent beliefs:** Solid majorities say both that forgiving loans now is unfair to those who have already paid off their debts (73%) and also that Biden's proposal does not go far enough to help borrowers (61%).

- Two-thirds of Americans – including (65%) of Republicans and Democrats alike – favor giving those who have already paid off their student loans a refund equivalent to the debt forgiveness current debtors are in line to enjoy, for example.

Implication:

According to Johnson, “The area on which Americans most agree, however, has largely been unaddressed by the debate thus far. More than four out of five Americans (including 82% of Democrats and 86% of Republicans) said that lowering the cost of tuition is more important than forgiving student debt – which only makes sense. Debt forgiveness is ultimately just a bandage if the underlying cause is not addressed – and there's a legitimate concern that paying debt down now will only send the cost of college higher.”



WAVE 117

WAVE 117 INTRODUCTION

The following research was conducted between **September 9 - 11, 2022** by The Harris Poll. Fielded among a nationally representative sample of **2,046** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

THE SLOW CREEP OF ECONOMIC OPTIMISM: HARVARD CAPS-HARRIS POLL

Introduction:

According to the September Harvard CAPS-Harris Poll in [The Hill](#), our Harris Poll Chairman (and Stagwell Chairman/CEO) Mark Penn reports a cautious increase in optimism for the American economy. ([Download the full report](#) and Mark/The Hill's Bob Cusack [podcast](#).)

- **It's not great but getting better:** While just a third of U.S. voters (32%) believe the country is **on the right track** (v. wrong track: 61%), it's an (8%-pt) increase from June's low where just (24%) felt the country was on the right track.
- And while just (30%) of voters believe the U.S. economy is **on the right track** (v. wrong track: 64%), this is also **up for the third consecutive month** from June's low (21%).
- And while there is a (7%-pt) increase in voters who **report their financial situation as having improved** and a (10%-pt) decrease in those reporting it as getting worse when compared to June, (54%) still see their situation worsening.

Implication:

As Mark Penn reports, the midterms remain nearly a dead heat even though President Joe Biden's approval rating is still underwater at (41%). Inflation remains the biggest concern for voters, over half of whom say the **Inflation Reduction Act is more likely to increase rather than decrease inflation**. Finally, while student debt relief is having little net effect on Democrats' outlook, the overturn of Roe v. Wade is increasing the likelihood of voting Democratic.

Section:

02

Topic:

HER MAJESTY'S LEADERSHIP LESSONS

Introduction:

Queen Elizabeth II's passing has brought a global outpouring of tributes to her life and legacy. And in new Harris polling, Americans unanimously agree her reign had a positive impact not only on the U.K. (88%) but in the world itself 75%).

- Among those Americans familiar with the Queen, more than half (56%) say **her best trait was her selflessness** in serving the people, followed closely by her **elegance** (53%) and her **diplomacy** (49%) – especially Boomers (75%, 64%, 59%).
- And four in 10 (41%) say she best represented a **strong female leader who projected loyalty and duty**, while a third (36%) said she represented a **cultural icon in the U.K. and globally**.
- Nearly six in 10 (58%) familiar with her reign say her most significant **legacy is her resilience and endurance** in her accomplishment as the **longest-serving monarch** over the U.K., followed by her **service during World War II** (13%).
- Four in ten (40%) of those familiar with Queen Elizabeth II say if they had to sum her up in one word, it would be "**graceful**."

Implication:

In these survey responses are lessons in her leadership. How do you manifest your sense of duty and service as a leader? How are you projecting empathy to others? And perhaps most importantly, how do you communicate and act in a way that engenders trust and respect, even when some (or many) disagree with you or the institution you represent? Take The Queen's example to heart.

Section:

03

Topic:

TRUTH, LIES, AND SOCIAL MEDIA

Introduction:

Before the world went all 'truthiness,' we were socially conditioned to arm our opinions with facts (or at least a reputable news source). But new surveying shows many Americans don't tell the truth about where they glean their facts from (They say TIME when they mean TikTok.)

- **Younger Americans get their news from social media:** Gen Z and Millennials report getting their information predominantly from social platforms (66%, 58%), compared to Gen X and Boomers, who say local news (54%, 61%).
- **Yet, most Americans are lying about what they learn on social media:** While (65%) say they have **learned something from social media** (e.g., a new fact, a skill, etc.), close to a third (31%) of Americans have told **someone they learned it elsewhere**, significantly younger Americans (Gen Z: 59%, Millennials: 53%).
- **One reason? Americans admit screen time is becoming more harmful:** A third of Americans (34%) report feeling **more anxious** now than six months ago (v. less: 21%), while at the same time, those who report **engaging more in screen time** directly than before have nearly tripled.

Implication:

The [trust gap between Americans and social media platforms](#) is substantial. Specifically, the [recent September results](#) of the Harvard CAPS-Harris Poll survey found that less than half of older Americans found Facebook (50-64: 44%, 65+: 36%) and Twitter (28%, 16%) favorable – which may explain why younger Americans are so willing to skirt the truth of where they find their information.

*For more insights and implications of the evolution of social media for younger Americans, make sure to listen to the America This Week: From The Harris Poll [podcast](#) this Friday.

Section:

04

Topic:

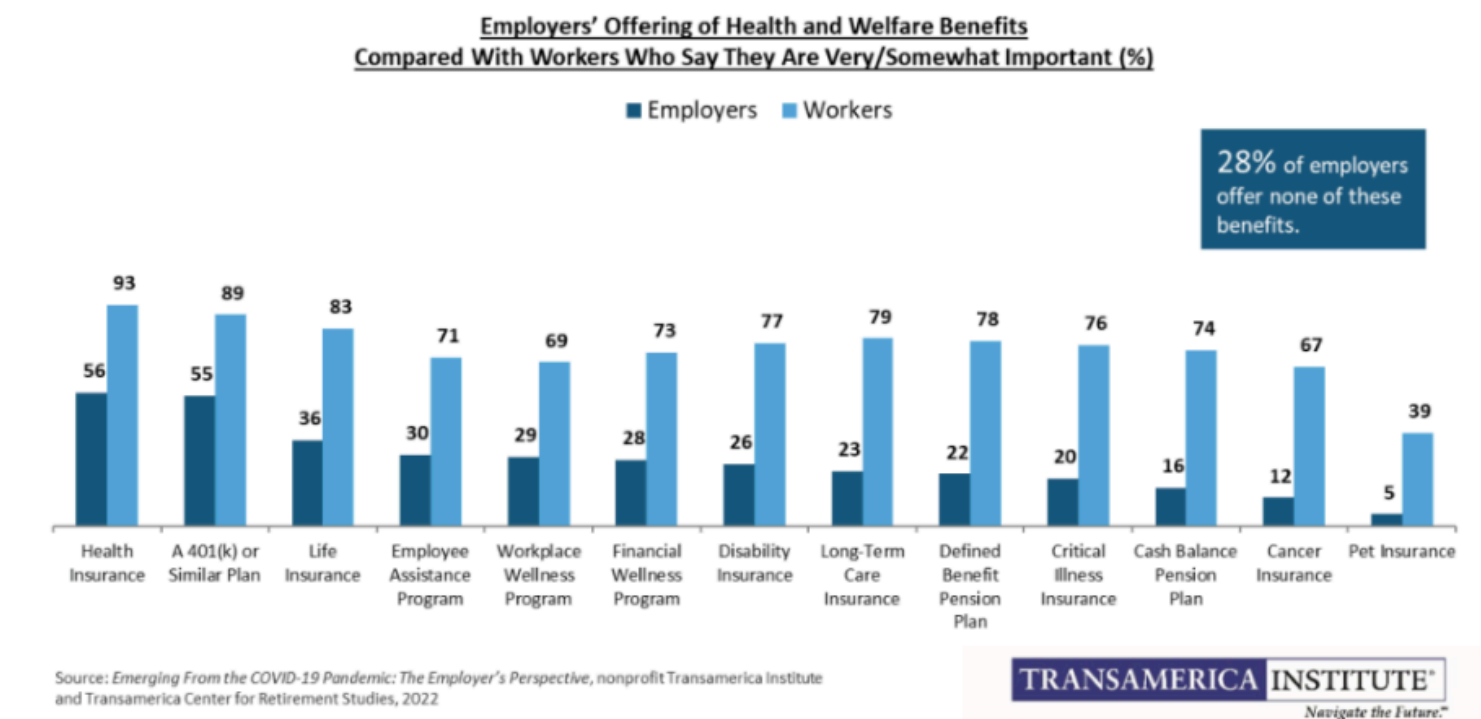
THE BENEFITS BUBBLE: MISALIGNED WORKER EXPECTATIONS & COMPANY POLICIES: TRANSAMERICA-HARRIS POLL

Introduction:

According to [our latest report](#) with Transamerica Institute and its Transamerica Center for Retirement Studies, we find that employers are coming up short on providing benefits that are important to workers.

- **Companies say they care:** 8 in 10 employers (81%) **feel responsible** for helping employees maintain **their long-term health and well-being**.
- (64%) Employers believe health insurance, retirement, and other benefits are **critical** in attracting and retaining employees.

- **Yet, there is here is a sizable shortfall between what workers find important and what benefits are being offered:** While workers find **health insurance, a 401(k) plan, and life insurance** to be the most important benefits (93%, 89%, 83%), many employers are lagging in providing these benefits (56%, 55%, 36%).



- **Employees are evaluating their employers:** In [partnership with Franklin Templeton](#), we found that two-thirds of workers (67%) had assessed what they want from their employers, and (44%) even considered leaving or having already left their job in the past year.
- **More work needed:** Back in February, in [partnership with Fortune](#), we found that only half of the workers (51%) reported their employers had added new or increased their existing benefits over the last six months.

Implication:

"In the wake of the pandemic, employers have been navigating complex issues in a rapidly changing environment," says Catherine Collinson, CEO and president of Transamerica Institute and TCRS. "A full compensation and benefits package is a win-win situation in the workplace. It can help employers attract and retain talent while providing employees income, work-life balance, and the ability to save for retirement while protecting their health, well-being, and financial situation." Want to learn more? Tune in Friday for the [ATW podcast](#), where Transamerica CEO Catherine Collinson will join John and Libby to discuss the findings and what they might mean for the future of work and talent acquisition.

Section:

05

Topic:

NINE IN TEN AMERICANS ABANDONED THEIR DIGITAL SHOPPING CARTS FOR ONE SIMPLE REASON: GOOGLE CLOUD/HARRIS POLL

Introduction:

Retailers poured millions of dollars into e-commerce during the height of the COVID-19 pandemic but have since struggled to maintain the pandemic-induced online shopping spike, and search abandonment may be to blame, according to a report with Google Cloud as covered [by Axios](#).

- About (94%) of American consumers **dropped their online shopping sessions** because of **irrelevant search results**.
- Three-quarters (76%) reported that an **unsuccessful search resulted in a lost sale** for that retail website, with half (48%) purchasing the item elsewhere.

- More than half (52%) say they **typically abandon their entire cart** and go elsewhere if there's **at least one item they can't find**.
- **Poor product discovery is a costly mistake** as the survey estimated that **retailers lose out on more than \$300 billion annually** when shoppers can't find what they're looking for on a retailer's website – yet two-thirds (64%) of U.S. retail website managers **have no clear plan for improvement**.

Implication:

According to Google Cloud Vice President of Retail and Consumer Solutions Carrier Tharp, "this matters on an ongoing basis as (85%) of those say they viewed brands differently [when consumers have difficulty finding products]" Tharp says – and this hurts a retailer's connection with consumers. Retailers need to consider boosting the use of the cloud, data and analytics, artificial intelligence, and machine learning to improve the online shopping experience, which will drive sales.



WAVE 116

WAVE 116 INTRODUCTION

The following research was conducted between **September 2 - 4, 2022** by The Harris Poll. Fielded among a nationally representative sample of **2,025** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

A LONELY SUMMER FOR AMERICA'S INTERNS: BLOOMBERG- HARRIS POLL

Introduction:

One undiscussed downside of remote working is the effective management of young people. This was brought into stark contrast in a new Harris Poll [with Bloomberg](#) showing that young workers found it difficult to make connections, get feedback, and learn company culture while encountering half-empty offices, absent managers, and sporadic networking opportunities.

- **Remote work makes for lonely young workers:** More than half of Gen Z interns/newly hired workers said working remotely makes it **difficult to establish connections. In contrast** (55%) said they feel like they're **missing out on an essential step into adulthood** because of how the pandemic affected office culture.
- Two-thirds of respondents said that **understanding corporate office culture is essential to their career. Still, remote** and hybrid work models **make it difficult** to understand and participate in their workplace culture (56%).
- And for those in fully remote or hybrid roles, (37%) said they feel like they're **falling behind** their counterparts who work in the office full time.
- **A disconnect in working arrangements is part of why:** While (46%) of interns worked remotely, over a third said their managers were in the office. And for the (33%) of interns who worked in-person, nearly a quarter said their managers worked remotely.

Implication:

In all the debate about the return to the office, we're overlooking what the future of work means—our collective role as managers of future talent. We forget we're dealing with an interrupted generation—first at school —and now at work. And if this past Summer is any indication, young people have lost faith in us as managers to mentor, listen and create a workplace where they can launch their careers. Remote work doesn't mean remote management.

Section:

02

Topic:

AMERICANS BLAME INFLATION ON A FAILURE IN LEADERSHIP

Introduction:

As spending data shows, Americans took the Summer to YOLO, indulging in revenge travel, concerts, and rescheduled weddings. But as they go back to work, persistent inflation is damping their outlook, according to new September Harris polling:

- 7 in 10 (71%) say rising inflation is **negatively impacting their ability to afford their monthly budget**, leaving (69%) to say they are likely **to cut back on spending** right now and more than half (56%) to **adjust the rest of their 2022 financial plans**.
- This is because less than a third of Americans (32%) feel confident in their finances and turn, feel **upset that leaders aren't doing enough for the economy** (55%), and **angry** that they don't know when economic upheaval will end (44%), and even regret in **missing out on experiences that they can't afford** to participate in now (40%).
- Less than half of Americans (48%, +4%-pts from March 2022) think inflation will likely **taper off** by 2023. (Younger Americans are more optimistic: Millennials and Gen Z think it's likely to taper off (58%, 53% v. Gen X: 46%, Boomer: 41%).

Implication:

Inflation is now like another more powerful variant of COVID, aiming at Americans' budgets and lifestyles. But leaders steeped in the economic numbers and talking points forget that inflation is highly personal: Rising prices mean painful tradeoffs and people missing out on things they want to do and experience, making this all feel like the third year of a seemingly never-ending interrupted life. The midterms could be a referendum on whom Americans feel most likely to give them back control over personal happiness.

Section:

03

Topic:

BACK TO WORK AND STAYING PUT

Introduction:

Earlier in the year, all talk was of The Great Resignation. Then Harris Poll data found [The Great Regret](#): Job-switchers who found the grass was not greener. And now, as Americans return to work, six-in-ten are saying they are settling back into their jobs, regardless of whether they want to.

- Four in ten Americans feel their **overall financial health is worse**, and nearly 3 in 5 (59%) say the current economy has killed their **confidence in their finances**, according to a recent survey [with NerdWallet](#).
- **A rocky economy is keeping employees where they are**: A recent Harris survey [with Bloomberg](#) found that (62%) of employees said current economic conditions are a key reason why they plan to stay at their current jobs and that companies have more leverage in the job market these days than employees (58%).
- It doesn't mean those choosing to stay are happy with their pay, as a recent survey with CareerBuilder, featured [in BizWomen](#), found that less than half of employees (46%) report **that fair compensation is what attracts them most** to their current roles.

Implication:

The Great Resignation is suddenly now The Great Lay-Low. But don't count on employers to have the upper hand for long. Akin to Harris polling on Quiet Quitting, employers must recognize their employees might be staying put, but not because they love their jobs. If the pendulum swings, those not willing to risk their job security for the unknown in this economic climate might be the first out the door. Complacent managers using the economy as a crutch for talent management will be the first to find this out.

Section:

04

Topic:

THE ECONOMY IS CHANGING, AND SO IS PHILANTHROPY: FORTUNE-HARRIS POLL

Introduction:

According to my good friend and co-CEO Will Johnson's latest [op-ed in Fortune](#), when it comes to philanthropy, Americans rose to the occasion during the COVID-19 pandemic. However, there were distinct differences between Americans in time and money given.

- **Younger Americans give their time; older Americans give their money:** (49%) of adults under 45 **volunteered** in the last year (v. ages 45+: 31%) and more often attended a fundraiser, rally, or other supporting events, yet those 45 and up more often **made a financial contribution**.
- Younger Americans were more likely to **give financial contributions to educational charities** than their older counterparts (28% v. 15%), perhaps because of their recent school experiences, their school-aged children, and their [support of government action on student loan debt](#).
- **Women have more brand loyalty to specific organizations, while men are more cause-oriented:** While women report being more likely to **support a particular organization** for their charitable contributions, men are more motivated by donating **to a cause** they want to help.

Implication:

Charitable organizations will need to be wary of potential dips in charitable donations as inflation continues to undercut American finances and their generosity. Johnson writes that "nonprofits must shift the focus of their messaging as they appeal for support in this inflation-battered economy. If charitable dollars become scarce, nonprofits should step up their appeals to younger Americans who are more inclined toward in-kind contributions of their time and skills."

Section:

05

Topic:

HOW INFLATION IS CHANGING OUR DIET

Introduction:

First, COVID created shortages at the grocery store, and now the highest inflation in forty years is prompting people to shift their eating habits again, according to recent Harris Poll data.

- More than three-quarters (76%) of Americans say that **grocery prices** are where they feel inflation most in their daily lives, and over 4 in 10 (42%) say they think it in **eating/drinking out at restaurants**.
- **But inflation is also changing eating habits:** Back in May, a Harris/Alpha Foods study [covered by CNBC](#) found 4 in 10 Americans (40%) reported **entertaining at home more than going out** to combat food inflation.
- **Going out less:** We also found that a third of Americans (33%) are still **willing to spend on eating out** given the state of the economy, and 3 in 10 (29%) would rather spend money on local experiences such as **trying a new restaurant** (v. travel experiences: 37%, physical products: 34%).
- It's **all about convenience and experience**. As we found in our latest [Harris Brand Platform data](#), consumers were **more likely to purchase from Panera** (usage +8.9) and **recommend the restaurant (+5.1)** after the company focused on convenience, dining experience, and even their logo in their rebranding efforts.

Implication:

Inflation is tightening American budgets and causing Americans to be more mindful of where and when they spend their money, especially regarding restaurant meals. Companies must be cognizant of their advertisements, promotions, and overall experience to keep consumers interested and coming back.



WAVE 115

WAVE 115 INTRODUCTION

The following research was conducted between **August 19 - 21, 2022** by The Harris Poll. Fielded among a nationally representative sample of **2,022** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

THE TABLES HAVE TURNED: BLOOMBERG-HARRIS POLL

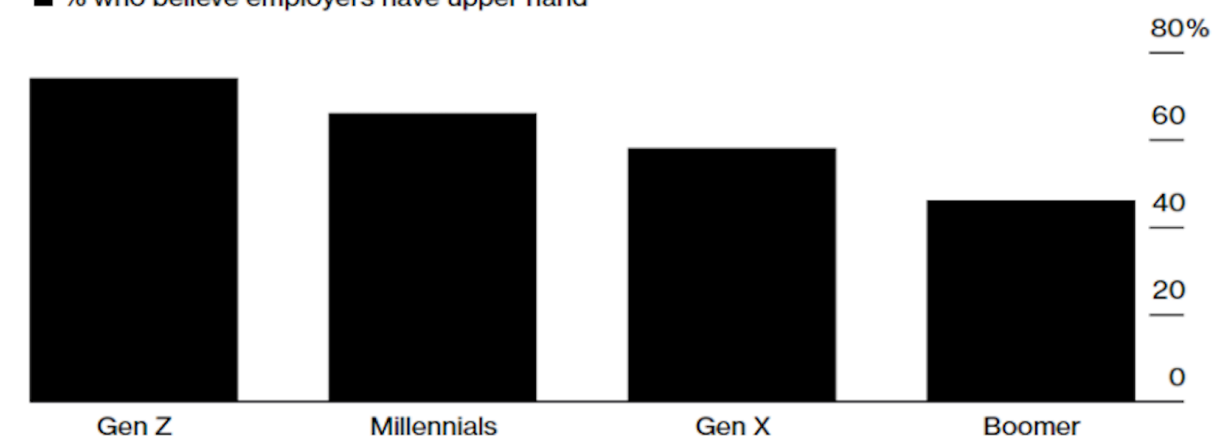
Introduction:

In our latest poll [with Bloomberg](#), U.S. employees say they're losing the upper hand as layoffs mount, along with concerns over the economy, pay, and remote work.

Bosses in Power

A majority of Americans in a recent poll said employers have more leverage in the job market

■ % who believe employers have upper hand



Source: The Harris Poll

- **Leverage is in the hands of employers:** (57%) of American workers believe **companies have more power** in the job market these days – a (5%-pt) increase from January. And as the below chart shows, younger employees especially feel this way.

- **Leaving employees to feel less empowered:** (59%) of workers indicated that while they would like a raise, they **don't feel comfortable asking for one**.
- And just half (51%) of **employees believe they can negotiate to work partially or entirely from home** without fear of repercussions.
- **Feeling like staying put:** Nearly two-thirds (62%) said current economic fluctuations are why they plan to stay at their current jobs.

Implication:

With employee wages not keeping up with inflation, It's a bit of a game of chicken. The calculus is: "I want to lock in greater pay right now by asking for a raise or moving to another job to get a raise. However, worrying about a recession, I'm now consciously thinking about my job security". Unfortunately, for many now, the choice seems to be retrenchment.

Section:

02

Topic:

AMERICANS AREN'T IMPRESSED WITH BILLIONAIRES

Introduction:

While six-in-ten Americans look up to billionaires, it doesn't mean that Americans are overwhelmingly pleased with the behaviors of the ultrawealthy, as seen by [our latest report](#).

- **A mounting disconnect between expectations and actions:** While seven in ten Americans strongly believe that billionaires have a responsibility to better society, they feel the ultra .0001% **are not currently doing enough**.
- That's because two-thirds of Americans (66%) believe economic inequality is a serious national issue, with nearly half (46%) saying that **billionaires make it harder to achieve their own American Dream** (LGBTQIA+: 68%, Gen Z: 59%, Millennials: 58%).
- Feelings of fairness rise to the top of Americans' concerns with billionaires: Two-thirds (65%) think that billionaires don't pay their fair share of taxes, (58%) believe that billionaires' activities contribute to the rising inflation, and (58%) share resentment over billionaires' wealth accumulation during the pandemic.

Implication:

"The self-made journey of wealth accumulation has always been foundational to the American dream, once with millionaires and now billionaires," says Libby Rodney, Futurist and Chief Strategic Officer at The Harris Poll. "From an individual point of view, many Americans still want to become billionaires, but from a collective sensibility, the story is shifting as billionaires are being painted as a barrier to Americans achieving their dreams while economic inequality grows. To a national crisis point."

Section:

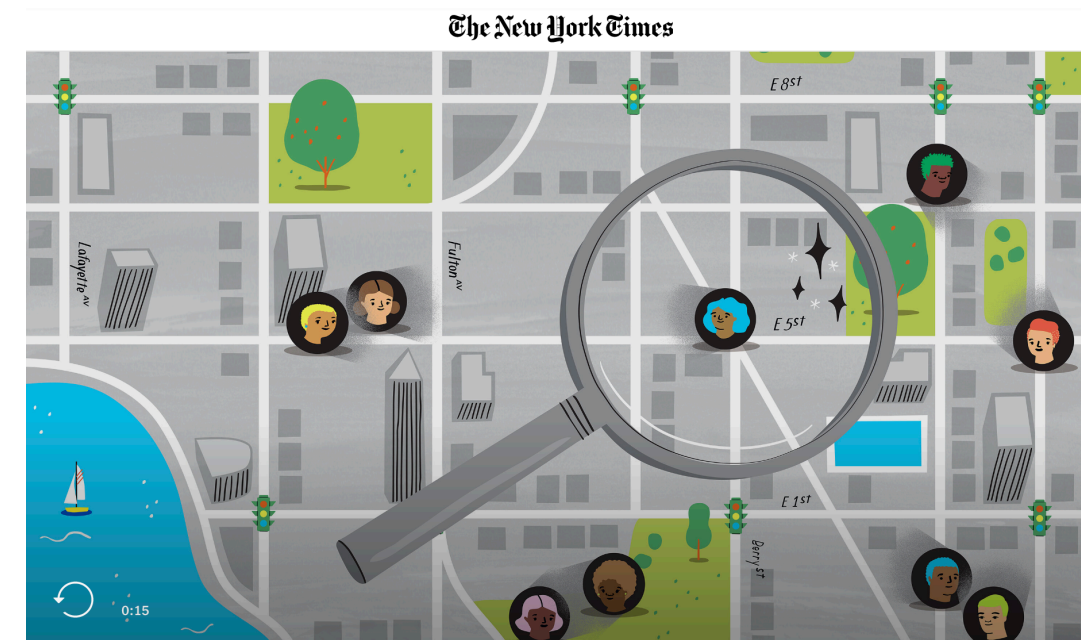
03

Topic:

THE DANGER IN LOCATION APPS: NEW YORK TIMES-HARRIS POLL

Introduction:

Introduced ten years ago, the Find My app has slowly become a popular way to keep track of friends. But in our survey [with The New York Times](#); however, the ease of sharing one's location speaks to a more extensive discussion around data tracking and privacy among users.



*Graphic | New York Times

- **Location sharing is a younger thing:** (77%) of Millennials and (69%) of Gen Z report having activated location-sharing features at least sometimes (v. gen pop: 62%).
- Almost half (48%) of those who use location-sharing apps **report wanting to share their location with other people** as a reason why, and two in five (37%) say they **feel safer** when they have location-sharing features activated.

- But sharing locations comes with privacy concerns: The New York Times [previously found](#) that dozens of companies use smartphone locations to help advertisers and even hedge funds, all unbeknownst to users.
- **Sadly, there are more severe consequences in a post-Roe world**, as [NBC News reported](#) that Facebook turned over chat messages between a mother and daughter who are now charged over an illegal abortion.

Implication:

While previous research [with Permutive](#) details a hesitancy among American and U.K. respondents in sharing their data with brands – (42% of consumers would opt out of data sharing ultimately with advertisers – the Find My case study may detail how, in reality, Americans are willing to share data when they have complete control and knowledge of how the data is being used (e.g., by their friends, their uber, etc.). We used to trade privacy for convenience gleefully, but now at what cost?

Section:

04

Topic:

WHY WE MAKE POOR CHOICES WHEN IT COMES TO OUR HEALTH: JUSTWORKS- HARRIS POLL

Introduction:

In a recent collaboration with [Justworks](#), we find a significant knowledge gap between American workers and their health insurance benefits and coverage, a gap that could end up costing them.

- Over half of employed Americans (54%) **don't know the full scope** of what their current health insurance offers them.
- **Sticking with what they know, for better or worse:** Nearly two-thirds (62%) said they don't usually change their health insurance selections yearly **because it's too stressful**. Half (49%) even report feeling pressured to **select the most expensive health insurance option** to ensure **they have the coverage** they need.
- **Beyond insurance, Americans also lack knowledge about dietary supplements:** Half Americans (49%) mistakenly believe that most nutritional supplements have been declared safe and effective by the U.S. Food and Drug Administration.

Implication:

Companies might be tempted to cut corners and costs given the opaque nature of corporate healthcare plans and employee reticence to dig deeper into their coverage. But health insurance benefits attract and retain talent: Employees cite having specific health insurance benefits as necessary when looking for a new job, and their current coverage is an important reason for staying in their role (78%, 63%, respectively). Businesses can also bolster communication since (44%) of workers feel uncomfortable asking H.R. insurance questions – leading to series such as [Axios' new series, Bill and Confused](#), which investigates confusing insurance claims and bills for everyday Americans.

Section:

05

Topic:

UKRAINE AT WAR, SIX MONTHS LATER: FORBES- HARVARD CAPS- HARRIS POLL

Introduction:

August 24th marks the sixth anniversary of Russia's invasion of Ukraine. According to recent Harris Poll COVID-19 Weekly Tracker and Harvard CAPS/Harris Poll data, [as featured in Forbes](#), Ukraine is still a top-of-mind concern for many Americans.

- **Strong support for Ukraine softens (slightly):** As of this past weekend, our weekly Harris Poll survey found that 7 in 10 Americans (70%) **remain concerned about the war** – but it was a (13%-pt) decrease from the heightened concern in mid-March.
- **Americans would be happy to help:** A late July [Harvard CAPS-Harris poll](#) found half of the registered voters (53%) saying the U.S. **should send billions more** in military equipment to Ukraine if Russia continues its invasion.
- Partly because they believe **U.S. support would make a difference**, with over half of voters (55%) believing that U.S. arms shipments would let **Ukraine push back Russia and win the war** compared to (45%) saying it's unlikely to alter the course of the war.

Implication:

American concern extends beyond a general worry for global neighbors to a more significant fear around the use of nuclear weapons in warfare. Three-quarters of voters (72%) are concerned that the war in Ukraine will lead Russia to use nuclear weapons inside the country. The concern isn't too far-fetched as the [U.N. calls for the immediate withdrawal](#) of Russian troops from the Ukrainian Zaporizhzhia nuclear plant amid fears of a catastrophic nuclear accident.



WAVE 114

WAVE 114 INTRODUCTION

The following research was conducted between **August 12 - 14, 2022** by The Harris Poll. Fielded among a nationally representative sample of **2,007** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

QUIET QUITTING: THE TREND OF WORKING LESS, BY FADING INTO THE BACKGROUND: USA TODAY- HARRIS POLL

Introduction:



After two years of COVID burnout, employees are dropping the idea of going above and beyond in their job, according to our recent work with [USA Today](#). And interestingly, data from The Harris Poll Weekly COVID Tracker reveals that work less for the same pay started just a year into the pandemic and may explain why we have more workers, yet lower productivity.

- **Context:** The term “**quiet quitting**” describes American workers putting their careers into cruise control by sticking by their job descriptions instead of late nights, on-call vacations, etc. But instead of changing jobs, they’re pausing, pondering, and planning the next step all while collecting their paycheck.
- **It seems to have started with working in pajamas...** Just months into the pandemic, (51%) of employees said they were more likely to work in their pajamas than get dressed (May 29, 2020), and six months later, in our survey with [Morning Brew](#), (36%) found workers would miss their athleisure, pajamas, and sweatpants in the office.
- **All rules went out the window while WFH** – “I do what I want”: Going into 2021, over a fifth (21%) of all workers and over a quarter (27%) of Gen Z/ Millennial employees **admitted to online shopping while in a meeting** and/ or while working. And Gen Z & Millennials workers even said **they were streaming shows while working** (24%) and setting **their email status to active while doing personal things to appear busy with work** (22% v. gen pop: 17%).
- **COVID burnout only added fuel to the fire:** As recently as April, half of all U.S. workers (51%) felt burned out from work, according to our [latest survey with Talkspace](#).
- **Now, work/life balance over climbing the corporate ladder:** (76%) of employed Americans now report that **happiness and a good work-life balance are more important** to them than their professional ambition and career advancement (26%).

Implication:

After six straight months of shrinkage, the U.S. economy is roughly \$125 billion smaller than it was at the end of 2021, according to inflation-adjusted Commerce Department data. Yet employers have hired 3.3 million new workers over that same period. How can a bigger workforce lead to lower productivity? Perhaps during the pandemic’s layoffs, companies could push a workforce to do more with fewer people.. But with a stronger labor market, workers seem to be saying ‘enough’.

Section:

02

Topic:

THE MIDTERMS ARE FAR FROM OVER: WALL STREET JOURNAL-HARVARD CAPS/HARRIS POLL

Introduction:

Our Harris Poll Chairman (and Stagwell Chairman/CEO) Mark Penn's [Wall Street Journal op-ed](#), 'The Midterms Are Far From Over,' suggests that the key voters are the (18%) who disapprove of Biden but still plan to vote for congressional Democrats:

- "Midterm elections are usually seen as a referendum on the president. Based on [Joe Biden's](#) approval ratings, Republicans should have locked victory in by now. But while a July 27-28 [Harvard CAPS-Harris Poll](#) finds Mr. Biden's job approval at a historic low of (38%), the Democrats still get (50%) of the generic congressional ballot. Of the poll's respondents, (18%) disapprove of Mr. Biden's performance yet plan to vote Democratic in November. A closer look at this group could prove useful to both parties as Election Day approaches.
- They break down as follows: (52%) Democrat, (6%) Republican, (42%) independent or other; (37%) liberal, (51%) moderate, (12%) conservative. Whereas (45%) approve of the Democrats, only (27%) approve of the GOP. And while (27%) have a favorable view of Mr. Biden personally, only (17%) say the same about Donald Trump."

- Read more [here](#) about the other midterm considerations held by American voters.

Implication:

An anti-establishment leader's appeal is capturing American voters' minds, especially Gen Z and Millennials. But unless there is a moderate candidate with a broad appeal, Biden and Trump could be the frontrunner nominees of their party (they lead their party's favorites for nominee if the primaries were held today among registered voters, 31% and 52%, respectively).

Section:

03

Topic:

AMERICA'S HIDDEN PUBLIC HEALTH CRISIS IS RIGHT BEHIND YOU: VERTOS MEDICAL-HARRIS POLL

Introduction:

In a new [Vertos Medical/Harris Poll Survey](#), more than 72 million Americans are suffering from chronic lower back pain (CLBP).

- **Back pain is more prevalent than any other disease state in America today:** The number of those with CLBP outpaces those with arthritis (58.5 million), diabetes (37.3 million), and heart disease (30.3 million).
- Life with CLBP **isn't easy** as more than three-fourths (76%) say it has **interfered with their ability to complete everyday tasks** – and close to half (44%) report **suffering with CLBP for five years or more**.
- Those suffering from CLBP are also **lacking quality treatments options** for their pain:

84%



I wish there were better treatment options to address my CLBP

70%



It has been difficult to find a treatment that works well to ease my CLBP

- And there is a larger **concern around opioids as a treatment** as close to a fifth of CLBP sufferers (15%) are taking opioids for it, despite updated CDC guidelines noting inadequate effectiveness and inherent risks.
- **A new wave of Opioid abuse?** In 2018, [in partnership with NPR](#), we found that the majority (87%) of Americans currently taking opioids were given prescriptions lasting longer than 5 days which is **the threshold of addiction risk** according to the [CDC](#), which states the chances of opioid addiction “significantly increase” after 5 days – worse, the typical prescription length was six times that we found.

Implication:

"Those suffering from CLBP face a compounding problem," Kathy Steinberg, VP of Media/Comms at Harris Poll, explains, "as more than a third are not being told what causes their pain, and opioid use is still high for pain management even given the latest treatment guidelines, suggesting that more awareness is needed in both finding the cause of pain and how to treat it appropriately." Beyond health implications, CLBP could become exacerbated as [Fortune recently](#) quoted a workplace-wellness and ergonomics educator that says the recent shift to remote work has "aged our bodies by about 10 to 15 years."

Section:

04

Topic:

AS THE WORLD WORKS ON ITSELF, BLACK CULTURE KEEPS IT PUSHING: FORBES-HARRIS POLL/CVS HEALTH

Introduction:

According to our colleague and media partner, Jared Council at Forbes, while much has changed in the last year for many Black Americans, systemic change is not reaching the areas it needs to fast enough, leading many [Black entrepreneurs to press on](#), even after bearing the brunt of the mental health crisis that's arisen in the wake of the pandemic. Jared's reporting highlights the **flourishing wave of Black entrepreneurialism despite the societal headwinds**:

- According to our CVS Health-Harris Poll National Health Project, as [covered by Forbes](#), (29%) of Black Americans rated their mental health as poor (v. white: 22%), a (+12%-pt) increase from pre-pandemic times – with (62%) saying that their **job negatively impacts** their mental health (v. white: 38%).
- In part, as we found back in May [in partnership with Forbes](#), only (49%) of Black employees say that companies have done a good job at **increasing racial diversity** among managers, executives, and other leaders, and (44%) say they've done well **implementing clear pay structures** to minimize racial disparities in pay.

- Especially as three-quarters of Black Americans (74%) think **investing in public programming, Black initiatives, and Black-owned businesses** would have a significant impact on the Black community.
- **Entrepreneurialism provides an outlet to circumnavigate barriers**: We found that Black Americans trusted big business last for institutions they trusted to push for change, trailing nonprofit organizations, small businesses, and even the government.
- Two examples Jared details are how the embedded integration [platform Paragon raised \\$13 million](#) to become the bridge between software applications and [how Emma Grede is building the Kardashian's billion-dollar business](#) empire as CEO of Good American.



Paragon cofounders Ishmael Samuel (CTO, left) and Brandon Fox (CEO, right). REXUS



Emma Grede. ALLY GREEN

Implication:

Implication: Even in face of the many mental health and business challenges, Black Americans continue to celebrate and uplift their culture as the work works on catching up. The [Black on the Block event](#), a pop-up marketplace, and festival centered on Black businesses is an example of that. Co-founders and sisters Char and Lanie Edwards launched it in Los Angeles in 2021 after experiencing being the only Black vendors in most marketplaces. This year they partnered with National Football League wide receiver Stefon Diggs to run the event in Washington, D.C.



WASHINGTON, DC - JULY 17: (L-R) Co-Founder of Black on the Block Char Edwards, Co-Founder of Black on the Block Lanie Edwards, Stefon Diggs and Rashaad Lambert onstage during Stefon Diggs Presents Black On The Block DC at Franklin Park on July 17, 2022 in Washington, DC. (Photo by Brian Stukes/Getty Images) GETTY IMAGES



WAVE 113

WAVE 113 INTRODUCTION

The following research was conducted between **August 5 - 7, 2022** by The Harris Poll. Fielded among a nationally representative sample of **1,998** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

MUSK'S SHOTGUN WEDDING: AD AGE/ HARRIS POLL

Introduction:

According to our latest survey [with Ad Age](#), Twitter's most avid users are **rooting for the company to prevail in its court case with Elon Musk**. Their reasoning is that if the billionaire loses, he will ultimately make Twitter better than the current management.

- **Context:** Twitter is suing Musk to make good on his \$44 billion deal to purchase the company after [he decided to pull his offer due to his concern over spambots](#).
- And Twitter's **most active users are siding with the social media platform** in the lawsuit (49%), with just a third (36%) rooting for Musk.
- This is in contrast to the (41%) of all Americans saying Musk should win (v. Twitter: 35%).
- **However, Musk might have backing for his spambot claims:** (70%) of Twitter users agreed that bots spread disinformation and harass users, and (55%) agreed there were **more bots on Twitter** than on other social platforms.

Implication:

By siding with Twitter in the lawsuit, the most active users are indirectly supporting Musk to be the new owner, indicating backhanded respect for Musk and his ability to take the platform to new levels. Not exactly a ringing endorsement for the current management regime. In November, shares of Twitter [had produced zero net return](#) since its IPO eight years ago.

Section:

02

Topic:

IS IT TIME FOR A THIRD-PARTY CANDIDATE? INSIDER/ HARVARD CAPS-HARRIS POLL

Introduction:

What Kanye West, Oprah Winfrey, and The Rock have in common: They're top third-party alternatives to the Biden-Trump 2024 presidential binary. According to the latest data from the [Harvard CAPS-Harris Poll](#), **voters are showing more interest in third-party candidates** at a time when approval ratings are historically low for government bodies, indicating a growing appeal of an “anti-establishment” type of leader:

- **Moving in from the two extremes, America is calling for a moderate leader:** 6 in 10 (58%) registered voters would consider a moderate independent candidate for president if the 2024 political matchup was between Trump and Biden - **significantly younger voters** ages 18 to 34 (68%).
- **Out with the old establishment:** 7 in 10 (69%) voters say President Biden shouldn't run again for the 2024 Presidential primary, and 6 in 10 (59%) say Trump shouldn't run either.

- **Making room for a new establishment:** Biden's and Trump's low numbers are making room for other potential presidential hopefuls, including celebrities, according to [Insider's](#) look at who could go from the red carpet to the White House: Oprah, The Rock, and Tom Hanks.

Implication:

An anti-establishment leader's appeal is capturing American voters' minds, especially Gen Z and Millennials. But unless there is a moderate candidate with a broad appeal, Biden and Trump could be the frontrunner nominees of their party (they lead their party's favorites for nominee if the primaries were held today among registered voters, 31% and 52%, respectively).

Section:

03

Topic:

COMPANIES AREN'T SWITZERLAND; THEY ARE THE U.N.

Introduction:

This summer was politically tumultuous with the overturning of Roe v. Wade, the January 6th Senate committee hearings, and the recent raid on former President Trump's home. And as every CEO knows, this has made consumers more demanding of companies and brands to take a stand. Yet be careful what you take a stand on. In late May, we released [The Axios-Harris Poll 100](#) rankings on corporate reputation, and politics poisoned many companies. For example, Disney's ranking dropped from 37th to 65th this year after initially opting not to address Florida's so-called 'Don't Say Gay Bill.'

- The lesson here is **that when you divide, you subtract.** (and that often means customers or employees or both). And therein lies the tension: Many companies who speak out feel pressured by the large, diverse workforces they manage. But CEOs think they can be Switzerland (hey, we're neutral) when they need to think more like the U.N., which has multiple conflicting constituencies to continuously manage and find common ground on by sticking to clear, sustainable, long-term goals, missions and beliefs.
- The overall trend is moving towards companies being social actors, as long as they do so from their long-held positions, values, and missions that connect to their businesses. Let's go inside the numbers:
- **Americans are divided on CEOs expressing political views:** Nearly three-fifths (58%) of Americans say this is either good for the company or has no impact (36%, 22%), yet nearly half (42%) say it's bad for the company.

- **But younger and BIPOC Americans think more progressively:** More than (54%) of Gen Z and (52%) of Millennials say **there's more reward in a CEO speaking out on social issues** vs. (44%) of Gen X and (40%) of Boomers who say the same. And nearly three-fifths (58%) of Black Americans and (54%) of Hispanic Americans say there is more reward vs. (43%) of White Americans.
- **And less than half say companies are getting it right:** Just (40%) of Americans say companies are speaking out on social issues at the right amount, while (32%) say they are doing so too much, and (28%) say not enough.
- **Take Roe v. Wade as an example:** In a recent Harris Poll [with Fast Company](#), (54%) of U.S. adults say it is essential that the brands or companies they buy from taking a position on abortion rights, and (41%) even felt brands have a greater responsibility to be vocal about abortion than other social issues.

Implication:

According to Stagwell Chairman/CEO (And Harris Chairman) Mark Penn's [op-ed in Ad Age](#), he recommends brands to take a position that's close to their business, assemble a balanced team of consultants, and be consistent in their values when speaking out on social and political issues. And in our reputation surveys, **Patagonia and Chick-fil-A have strong corporate reputations among all Americans.** And yet, can you imagine them at the same company picnic? Still, Americans respect their beliefs, if not their politics, because they walk their talk.

Section:

04

Topic:

CRYPTO- CAUTIOUS, BUT STILL CURIOUS: MASTERCARD- HARRIS POLL

Introduction:

More than a decade after the launch of bitcoin, global citizens remain curiously cautious about cryptocurrencies, according to our latest collaboration on [Mastercard's New Payments Index](#) featured [in TechCrunch](#).

- Only (11%) of global citizens reported having made a purchase using a digital asset, and over a third (36%) say they **are likely to pay with cryptocurrencies** in the next year.
- After this Spring's notorious crypto meltdown, consumers would **like to see more stability in the industry**, with six in ten (59%) agreeing that they would feel more confident about crypto if they knew it was **issued or backed by a reputable organization**.
- A similar number (63%) also agree that **the government should regulate** the cryptocurrency and stablecoin sectors.
- According to TechCrunch, **the cryptocurrency market is expected to expand** — despite price volatility, growing pains, and the current “crypto winter” — from \$1.2 billion in 2021 to \$2.8 billion in 2028.
- Consumer acceptance of crypto is attributed to the rising popularity of digital assets as investments, security, fast processing, the formation of new legal guidelines, and technologies that simplify use.

Implication:

This reimagining of money can lead to new business models, economies, and ways of exchanging value in everyday transactions - yet companies will need to inspire trust to gain new consumers. And soon, the metaverse will span digital and physical worlds via augmented, virtual, and mixed reality platforms. Many bettors believe consumers will move between them armed with new digital wallets, inspiring new types of creators. So shorting crypto might be short-sighted.

Section:

05

Topic:

THE SUMMER OF YOLO TRAVEL - HARRIS BRAND PLATFORM

Introduction:

Americans are finally making up for lost time since the pandemic put travel on hold, according to Harris Poll [COVID-19 Weekly Tracker](#) and [Harris Brand Platform data](#).

- **This summer, Americans wanted to get back out there:** Three-fifths (75%) planned to take a road trip, while over two-thirds (69%) planned a hotel stay, and a half (50%) were booking flights.
- **Coming out of the pandemic cave:** (64%) were willing to spend more than usual to socialize and travel (64%) this summer, and (58%) planned to spend more on concerts, sporting events, and museum visits – especially Millennials, who were most willing to pay more on socializing, travel, and experiences (all 74%).
- **Pent-up demand signals a new suite of customer incentives:** Case in point, TripAdvisor released a new membership option right as many Americans became vaccinated and were re-entering the travel market after a year at home, causing their brand equity to increase (+7.8), along with their consumer trial (+13.8) and usage (+9.1) numbers between February and August 2021.

Implication:

Companies cannot introduce new subscriptions, products, and brand lines in a vacuum and instead need to drive excitement by utilizing well-positioned and well-timed releases to their unique and current consumer bases.



WAVE 112

WAVE 112 INTRODUCTION

The following research was conducted between **July 22 - 24, 2022** by The Harris Poll. Fielded among a nationally representative sample of **1,986** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

WORKERS: OUR WAGES AREN'T KEEPING UP: ASA-HARRIS POLL

Introduction:

With wages not keeping up with inflation, a majority of U.S. workers are concerned that their paycheck isn't enough for themselves and their families, according to our latest survey with the American Staffing Association (ASA), as covered by [The Hill](#) and [Bloomberg](#).

- Nearly 6 in 10 (58%) employed Americans are concerned that **their paycheck won't cover their needs** now.
- And because of that, **one job might not be enough anymore**: Nearly three in ten said they **plan to seek a job change in the next six months**, while another (28%) **will look for a second job**.
- Gen Z and Millennial workers were most likely to say they will search for a **new, higher-wage job** in the next six months.
- At the same time however job switching is suddenly becoming more precarious: (52%) of Americans are now concerned about losing their jobs

Implication:

Employers are balancing a delicate act of passing on higher costs to consumers and keeping their labor force happy. Beyond compensation, they should consider other stressor factors like work flexibility and investments in employees' professional development as ways to keep and recruit talent. But any relief, however creative is imperative: [KPMG found that](#) some companies are reducing employee healthcare premiums by 10% in 2022, with no change in benefit levels.

Section:

02

Topic:

THE MENTAL HEALTH CRISIS AMONG BLACK AND HISPANIC AMERICANS: THE CVS HEALTH-HARRIS POLL NATIONAL HEALTH PROJECT

Introduction:

July is Minority Mental Health Awareness Month, and our latest data from the CVS Health-Harris Poll National Health Poll, covered exclusively by [Forbes](#), found that minorities bear the brunt of the mental health crises driven by the pandemic.

- Four in ten (40%) Hispanic Americans (+10%-pts pre-pandemic) and (29%) of Black Americans (+12%-pts) **rated their mental health as poor** (v. white: 22%).

- **And their workplaces aren't helping:** (62% of Black and (54% of Hispanic Americans report their job as negatively impacting their mental health (v. white: 38%).
- But for those employed, small percentages of Black and Hispanic **employees say their employer openly talks about mental health** (35%, 34%, respectively).
- And back in February [in partnership with Fortune](#), we found similar numbers even reported a complete lack of mental health services in their workplaces (Black: 31%, Hispanic: 42%).

Implication:

The conversation around mental health for communities of color extends beyond the corporate environment, too, as half of the Black respondents and (41% of Hispanic respondents said that while they'd like to go to therapy, they can't afford it.

Section:

03

Topic:

CONSUMERS' CONCERN RISE ON BRANDS TRACKING THEIR ONLINE BEHAVIOR: PERMUTIVE- HARRIS POLL

Introduction:

According to our survey in partnership with [Permutive](#), US and UK consumers are concerned about their data privacy, tracking, and sharing, underscoring a trend of decreasing consumer trust with targeted advertising.

- Only (27%) say they **completely understand how their personal data is** used by brands and companies to target them with advertising online.
- Three-quarters (75%) of consumers are **not comfortable** making a purchase from a brand that has poor personal data ethics.
- Nine in ten (89%) say they would be more likely to spend money with a brand that makes a commitment to protecting their personal data online over one that doesn't.

Implication:

Suddenly, Americans look a lot like Europeans when it comes to data privacy concerns. The U.S. advertising industry can no longer play the role of “innocent bystander” in data privacy and must move towards responsible and transparent collection, management, and usage of consumer data if they want to avoid the privacy downfalls of potential lost sales and their impact on corporate reputation. Meta, (Facebook) for instance scored in the bottom 5% on trust and reputation in our most recent Axios-Harris Poll.

Section:

04

Topic:

WILL USICA GET TOUGH ON CHINA?

Introduction:

According to [a recent Forbes op-ed](#) featuring The [Harvard/CAPS-Harris Poll data](#) overseen by Stagwell Chairman/CEO (And Harris Chairman) Mark Penn (and written by his founding partner of Penn-Schoen Berland, Doug Schoen), the focus is on the USICA bill and its potential impact on inflation and stalling supply chain issues.

- **USICA: The United States Innovation and Competition Act**, would authorize spending of \$100 billion over 5 years on a new technology directorate including tech research but especially, incentives to bring CHIP production back onshore by creating capital investment incentives for companies like Intel and Nvidia.
- The bill also has the potential to impact leading American concerns **around inflation** (89%) and **supply chain issues** and potentially reverse some pessimism, as back in mid-June, we found that three-quarters (76%) believe **that the worst is still ahead of us** regarding inflation).
- Regarding supply chain disruptions, in mid-May, (63%) of Americans agreed they are understandable given global circumstances (e.g., the pandemic, the Russia-Ukraine war, etc.) – however, Millennials and those with HHI under \$50K are the least forgiving, as (40%) and (44%) **expect companies to honor their service commitments** and disruptions are unacceptable.
- Yet, (56%) would be willing to pay higher prices for service guarantees – a (15%-pt) increase from mid-January 2022, when only (41%) of Americans said so.
- Schoen, says, “The president has struggled to project strength and steadiness as Commander in Chief, and as a result, his approval rating on foreign affairs is just 40%, according to a recent Harvard-Harris poll. Handing over American technology and products will only worsen voters’ perceptions of his ability to lead on the world stage and will give his political opponents fresh ammo in the midterms.”

Implication:

Even if passed, USICA is not a quick fix to economic turbulence, as 7 in 10 Americans believe that we are already experiencing a global recession and a similar number of registered voters believe the U.S. economy is weak. But with China looming around Taiwan, the world’s largest CHIP producer, this is not only a supply chain issue, but a potential national security issue as well.

Section:

05

Topic:

WORK TRAVEL HAS CHANGED POST COVID TOO: HARRIS BRAND PLATFORM

Introduction:

The COVID-19 pandemic shut many doors yet opened some new opportunities as thousands of office workers were told to clock in remotely. With wi-fi a nearly ubiquitous fixture across the country, many people are hoping remote work is a free ticket to work their 9-to-5 from exotic new locations, according to our [latest snapshot](#) utilizing [Harris Brand platform data](#).

- More than a fifth (22%) of those wanting to work remote, partially or permanently, **desire the ability to** travel while working remotely.
- More than half of employees who desire the freedom of remote work in order to travel consider requiring employees to work onsite **an outdated practice** (67%) and a sign that **an employer doesn't trust its employees** (52%).
- **Yet, there may be trouble in paradise:** There is some fear among employees who want to work remotely that working offsite **could make them look lazy** (34%) or feel **more pressure to be accessible** (58%).
- Whether to escape their home office or a family vacation, **travel demand is growing** as our Harris Brand Platform **found increased use of Booking.com**, seen by their significant lift in both the Trial (+5.6) and Usage (+6.8) stages between May to June.

Implication:

While COVID-19 squashed traditional work travel, a new type of traveling employee was born as destination work took off. As companies establish their new in-office/remote work policies, it is still to be seen whether workcation packages become a more common offering across large hotel chains or slowly fade away as a pandemic memory.



WAVE 111

WAVE 111 INTRODUCTION

The following research was conducted between **July 15 - 17, 2022** by The Harris Poll. Fielded among a nationally representative sample of **1,989** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

PRENUPS AREN'T JUST FOR THE RICH: THE NEW YORKER-HARRIS POLL

Introduction:

Few get married expecting to get divorced later, but more couples are entering into prenuptial agreements than ever, according to [our latest poll with The New Yorker](#).

- While only (15%) of married or engaged Americans say they have signed prenups, nearly (40%) of married or engaged ages 18-34 have signed prenups, while just (13%) of 45-54 have done so and (5%) of 55+.
- And among Americans who have been married or are currently engaged, more **younger couples reported signing a prenup** than older: Gen Z: 41%, Millennials: 34% v. Gen X: 10%, Boomers: 5%).
- **Why the prenup craze? Cultural permissibility is changing:** Today, over 4 in 10 (42%) Americans **support the use of prenups** – a significant increase from 2002 when only (28%) said prenups make smart financial sense.
- **Planning for a prenup:** While (35%) of unmarried Americans say they are likely to sign a prenup, (52%) of Gen Z and (40%) of Millennials report being likely to (v. Gen X: 32%, Boomers: 22%).

Implication:

What's going on? Younger Americans aren't seeing prenups as a signal of mistrust but as a common sense financial transaction and possibly a security blanket with the current economic upheaval and the macro uncertainty in their lives, be it climate change, inflation, or geopolitical instability. To them, it makes sense to pack a 'go bag' just in case.

Section:

02

Topic:

POOR COMMUNICATION COSTS BUSINESS: GRAMMARLY- HARRIS POLL

Introduction:

According to our [research with Grammarly](#), as mentioned [in Fast Company](#), businesses aren't communicating effectively enough – and it's costing them.

- Nearly all business leaders surveyed agree that “effective communication is essential for delivering results” (96%) and that “communication is the backbone of business” (93%).
- **Quantity doesn't guarantee quality:** Yet, while workers report spending approximately half of a typical 40-hour workweek on written communication alone – (72%) of business leaders agree **their team struggles with effective communication.**
- Nearly 9 out of 10 business leaders have experienced the adverse impact of poor communication at work, including **increased costs** (45%), **missed deadlines** or increased time to resolution (39%), and **eroded brand credibility** or reputation (34%).

Implication:

Here is yet another relatively unseen, unmeasured cost of adjusting to the hybrid workplace. While work no longer takes place 100% in the office, business teams still need to communicate 100% of the time – otherwise, our study estimates that businesses in the U.S. may lose as much as \$1.2 trillion per year as a result of communication breakdowns. Instead of thinking only about reconfiguring office space, leaders need to think about overhauling their communications infrastructure.

Section:

03

Topic:

IT'S INFLATION, NOT AVOCADO TOAST: DAVE- HARRIS POLL

Introduction:

For all their differences, back-to-back generations of Gen Z and Millennials agree on one thing: They believe they'll never be able to afford most of the things they want in life now and in the future, according to our recent partnership with Dave, as [covered by Fortune](#).

- (61%) of Gen Z and Millennial respondents report a **lack of confidence** about affording their dream future.
- Three-quarters are concerned that the money they currently have or will save will **not last** (75%) and that they are **just getting by** financially (73%).
- Gen Z and Millennials report inflation (43%), not having enough “rainy day” savings for an emergency (33%), their credit scores (24%), and inability to find a good-paying job (23%) as their leading worries currently.

Implication:

Gen Z and Millennials graduated into vastly different yet similarly brutal economic climates for young workers — and both are experiencing inflation for the first time — leading to growing concerns about the ability of these generations to build wealth. Forty-year high inflation driving wage earning-consumption gaps, and decades high mortgage rates only exaggerate the reality of young Americans falling behind.

Section:

04

Topic:

DON'T CALL ME AN INFLUENCER: MMI-HARRIS POLL

Introduction:

Influencers have been around since the Kardashians. But with rising pressures on client budgets, are they all worth it? What separates the ones who bring true value to clients vs. the Insta-posers? We partnered with our [sister company MMI](#), as [covered by MediaPost](#), to get to the heart of what motivates content creators to do what they do and what they wish their marketing partners knew.

- Three-quarters of influencers and content creators (77%) say they have a **passion for their subject areas**, and two-thirds (66%) want to **build a community** around shared interests.
- (74%) report **that engaging with their community**, potentially at the expense of brand partnerships, is their **main priority when creating content**.
- Nearly all of those polled (98%) say it's important to work with brands **that align with their values** – and only (12%) say that revenue is the most significant factor in determining success.
- Over half (57%) say brands should keep in mind **the need for content to be authentic**.
- MMI CEO Maggie Malek puts it best: "Influencer marketing has grown up quite a bit from an early lifestyle "trend" to a critical ingredient in a brand's marketing and communications strategy. The reason is simple. Third-party and peer recommendations have always carried powerful sway, and now, those individuals are more talented, brand-knowledgeable, and creative than ever. Hence, why (59%) of them **actually prefer the term "creator"** to "influencer."

Implication:

Content creators and influencers can't be bought by brands with misaligned values. Influencers are truly obsessed with the category they're in, they are always in discovery mode and love to bring something fresh and unexpected to their community. Marketers need to understand this passion. It's what drives them. It's what separates an 'influencer' from a true creator.

Section:

05

Topic:

TIME IS TICKING FOR BIG TECH: AXIOS-HARRIS POLL

Introduction:

As Big Tech legislation comes down to the wire in Congress, we looked at the [Axios Harris Poll 100](#) to see what it could tell us about the state of tech trust in America.

- In our [2022 Axios Harris Poll 100](#) gauging the reputation of 100 highly visible companies, several big tech names received high ranks, including Amazon (No. 8), Microsoft (No. 15), Apple (No. 21), and Google (No. 31), while TikTok, Facebook, and Twitter all finished in the bottom ten.
- Social media ranked low in part to only (46%) of Americans **trusting Big Tech** with their **personal information and data**.
- In an additional Harris Poll study, we found that (85%) of Americans agree that there is **too much economic power** in the hands of a few technology companies and that technology companies **take more than they give** (84%).
- And 8 in 10 (79%) Americans aren't confident that current politicians understand the web and technology enough.

Implication:

Companies can win the public over with innovative and delightful products, but that doesn't necessarily correlate with consumer trust.



WAVE 110

WAVE 110 INTRODUCTION

The following research was conducted between **July 8 - 10, 2022** by The Harris Poll. Fielded among a nationally representative sample of **1,994** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

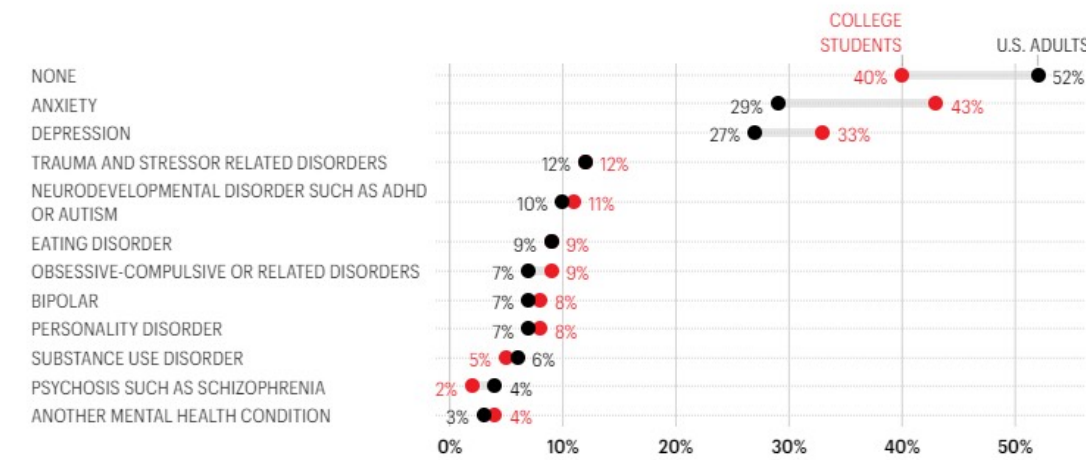
WHERE ARE COLLEGE RANKINGS FOR MENTAL HEALTH SERVICES? FORTUNE-HARRIS POLL

Introduction:

We've studied mental health in our country extensively. But this new data is especially concerning: In [our latest research with Fortune](#), six in ten (60%) of college students are living with mental health issues and most schools are unprepared to address it, leaving students facing dire consequences.

College students experience much higher rates of mental illness

Fortune asked college students: Have you ever been diagnosed with a mental health condition? If so, select all that apply.



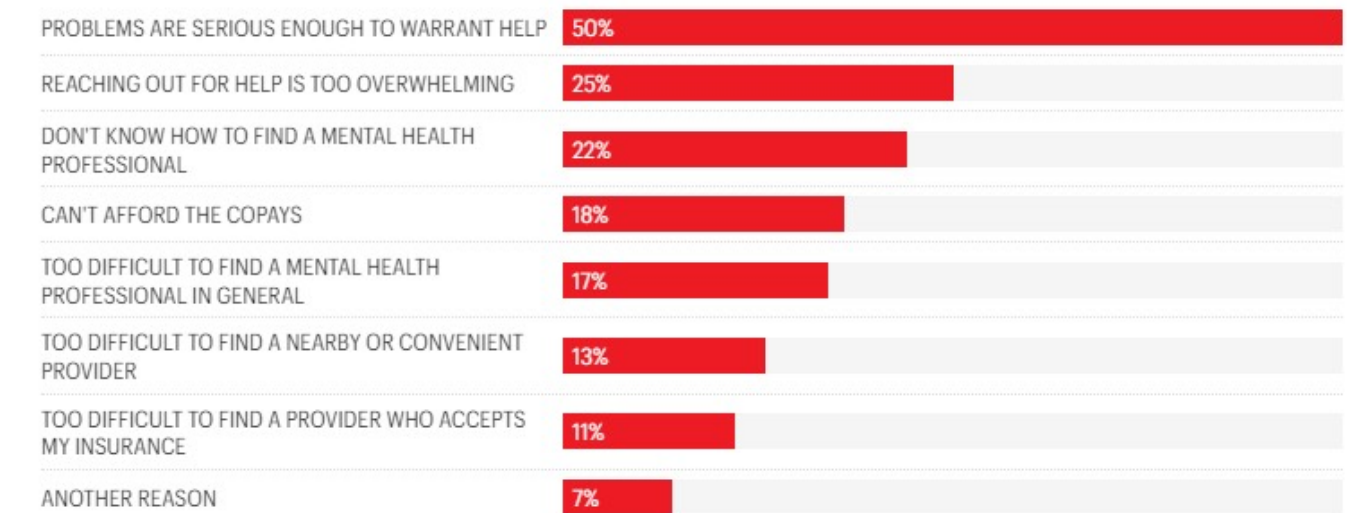
DATA BASED ON FORTUNE SURVEYS CONDUCTED BY THE HARRIS POLL OF 1,000 U.S. COLLEGE STUDENTS AND 2,064 U.S. ADULTS
SOURCE: FORTUNE

FORTUNE

- **The compounding factors:** Among students who have received counseling, less than a third report using mental health services provided by their college or university – in fact (58%) of students reported being put on a waitlist at their college’s counseling services.
- **College tours should include the wellness center:** Just over a quarter (28%) of students strongly agree that they know where to go on campus to receive mental health treatment.
- What’s worse, many students don’t feel their problems warrant the need for help:

College students commonly believe problems are too insignificant to seek help

Fortune asked students not currently receiving mental health treatment what the top reasons were that prevented them from doing so.



DATA BASED ON FORTUNE SURVEYS CONDUCTED BY THE HARRIS POLL OF 1,000 U.S. COLLEGE STUDENTS AND 2,064 U.S. ADULTS
SOURCE: FORTUNE

FORTUNE

Implication:

Universities should be touting their culture of wellness the same way they do inclusivity. Despite the high prevalence of mental health problems among college students, counseling services are rarely featured prominently in university brochures, let alone in nationwide rankings, leaving students unprepared in knowing which universities would be able to support both their academic careers and mental health. And even as Gen Z are the most open to speaking about mental health in our surveying, they feel their problems don't merit university attention – a stigma educators need to attack.

Section:

02

Topic:

GAS PRICES STRIKE AGAIN, LEAVING AMERICANS HESITANT TO PURCHASE NEW CARS: TIME-HARRIS POLL

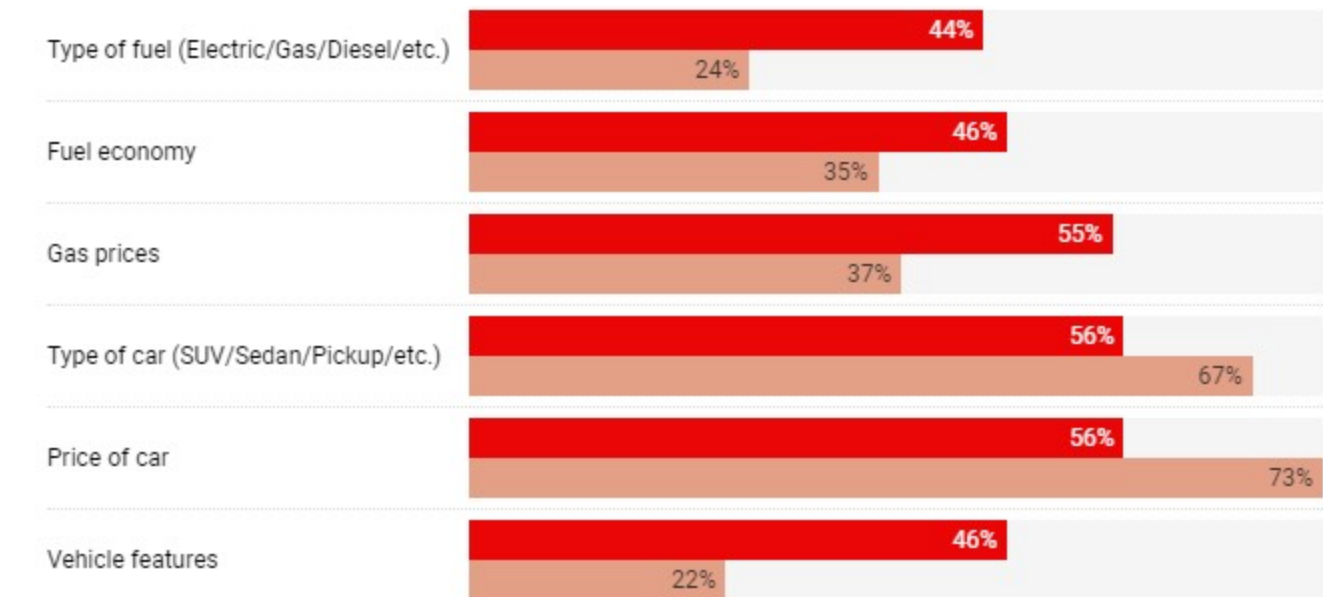
Introduction:

According to our [latest poll with TIME](#), high gas prices are discouraging Americans from buying cars right now.

- Only (10%) of respondents bought a new car in the past six months and many cite gas prices as the main deterrent: (47%) said **high gas prices were a big reason why** – compared to only a third (37%) of those **citing environmental concerns**.
- **New car owners considered gas prices as much as the cost of the car when making their decision:** For those who purchased a car in the past six months, **gas prices were pretty much equal in consideration to car price and type** (55% vs 56% respectively), in addition (46%) said fuel economy mattered as well as (44%) type of fuel.

Here's what mattered when renting or buying a car recently

Share of Americans surveyed that **bought** or **rented** a car who made their decision because of the...



Based on a survey of over 1,000 people in the U.S. Just 10% bought a car so far this year while 15% had rented.

Chart: Kyla Mandel. • Source: Survey conducted by Harris Polls between June 28 and 29, 2022

TIME

- **Meanwhile, those renting a car are being less frugal:** When it comes to car rentals, consumers **are least likely to consider** the type of fuel (24%), fuel economy (35%), and gas prices (37%) than they are to consider the type of car (67%) and the price of the car (73%).

Implication:

It remains to be seen if Americans will wean themselves off SUVs and pickups and return to the compact car craze of the 70s when there were long lines for gas. But this data shows the 'knock-on effect' in other categories that higher energy prices bring. Yet while high gas prices might be suppressing new car purchases, it isn't completely getting Americans off the roads: Enterprise Holdings found that two-thirds of their customers planned to go on road trips this year, albeit for (59%), just smaller ones closer to home.

Section:

03

Topic:

THE GOLF WAR – LIV TEES OFF STATESIDE: SPORTS ILLUSTRATED- HARRIS POLL

Introduction:

Golf's civil war has arrived in the United States as the LIV Golf series made its American debut as detailed by Harris Poll CEO (and avid golfer) Will Johnson [in Sports Illustrated](#). We found the upstart league is gaining traction — especially among younger golf enthusiasts.

- Nearly three-quarters (74%) of golf fans and over half (55%) of Americans aware of LIV Golf have **plans to watch at least one event this year** – with two-thirds of golf fans having already tuned in.
- Younger Americans are **more aware of, more interested in, and more open** to the LIV tour — and the split is sharp as 7 in 10 (71%) aged 18 to 34 familiar with LIV plan to watch an event (v. gen pop: 55%).
- **Not without controversy:** The generational divide is even starker on its Saudi funding as a majority (52%) of those 45 and younger are OK with the arrangement, while those aged 55 and older report far more frequently that they disapprove.

Implication:

The new Saudi LIV league has grabbed its share of young professional golfers — Eugenio Chacarra, who was the world's No. 2 amateur golfer, and James Piot, the 2021 U.S. Amateur champion who both joined LIV recently. And younger consumers seem to not care that critics have derided LIV as [sportswashing](#), where a disreputable regime tries to rehabilitate its reputation through sport. Given how ethically-driven Gen Z are, one wonders if a backlash is coming as awareness of LIV grows?

Section:

04

Topic:

PEDOMETERS ARE SO 2002, HELLO HEALTH WEARABLES

Introduction:

Back in February our CVS Health-Harris Poll National Health Project, [as covered by Axios](#), found that Americans were reconnecting with their health, so what does that mean about health wearables?

- Back in February, Americans reported a desire **to stay more active, prioritize their health habits, and buy products** to boost their health (47%, 43%, 35%).
- Partly because according to our [2021 Stress in America report](#) with the APA, overall **health took a back seat during the pandemic**: (47%) delayed or canceled health care services, (42%) reported undesired weight gain, and (23%) were drinking more to cope with stress.
- **Health wearables are key for many consumers**: In [our latest report](#), we also found that Americans would like to monitor their physical activity (55%), blood pressure (48%), and sleep (37%).
- And according to our latest [Harris Brand Platform data](#), **health goals are converting into purchases** as Fitbit's brand equity score peaked at 60.6 in July 2021 following new product releases, and experienced the greatest spike in perceiving product quality (+12.0) and brand momentum (+5.6).

Implication:

Americans are increasingly reliant on data to make decisions about their personal health, and companies like Fitbit have recognized and responded to this enthusiasm by continuing to develop and expand upon their range of trackable metrics. Other brands might understand how to build engagement by creating feedback loops, gamification, and other means of building a coaching-mentoring-encourager relationship as it seems consumers crave positive, tangible affirmation and positive narratives.



WAVE 109

WAVE 109 INTRODUCTION

The following research was conducted between **May 27 - 29, 2022** by The Harris Poll. Fielded among a nationally representative sample of **2,075** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

WE ASKED BLACK AMERICANS: HOW SAFE DO YOU FEEL TWO YEARS AFTER GEORGE FLOYD'S MURDER: FORBES-HARRIS POLL

Introduction:

In honor of the two-year anniversary of George Floyd's death, we partnered with [For\(bes\) The Culture](#) to understand how Black Americans feel today, what's changed vs what still needs changing, and where businesses can do better.

- 7 out of 10 Black Americans say they feel **stressed by discrimination in wealth building** – Black American households average 12 cents of wealth to every dollar held by white households, according [to the Federal Reserve](#), and Black Americans are more than twice as likely to [live in poverty](#) as whites.
- 9 out of 10 believe companies should **have a role in advancing racial equity** for their current Black employees (large role: 61%; some role: 27%).
- Yet, when asked to rate companies' racial equity work in the last two years, only (49%) say that companies have done a good job at **increasing racial diversity among managers, executives, and other leaders**, and (44%) say they've done well **implementing clear pay structures** to minimize racial disparities in pay.

Implication:

Companies will have to enact meaningful change and progress in their racial equity work as when asked which institutions they trusted to push for change, Black Americans ranked big business last, after nonprofit organizations, small businesses, political groups, and even the federal government.

Section:

02

Topic:

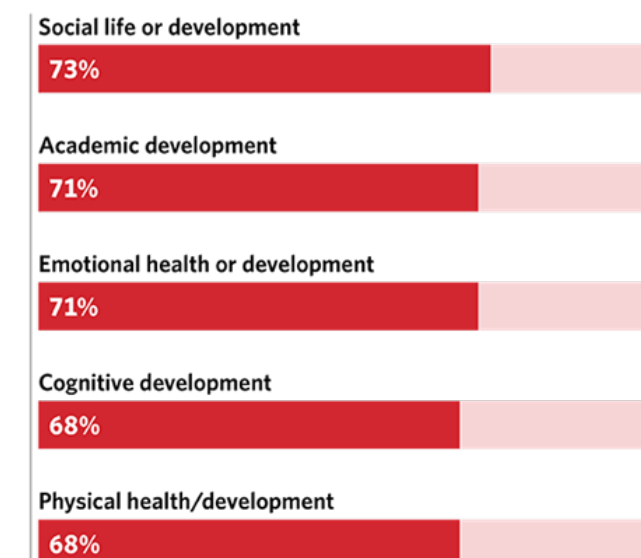
PARENTS AREN'T ALRIGHT: APA-HARRIS POLL

Introduction:

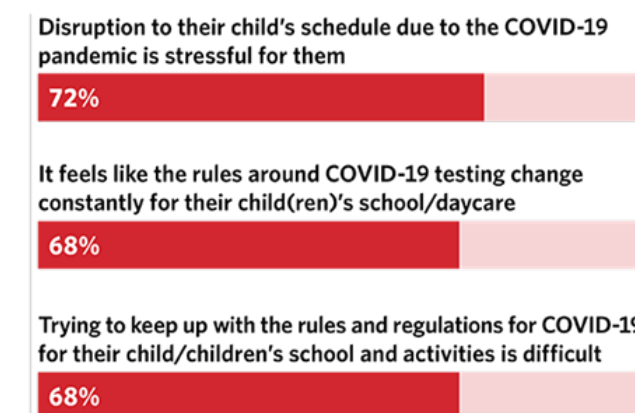
Parenting is always hard, but it's being compounded by global unrest, an unpredictable economy, and an ongoing pandemic according to our [survey with the American Psychological Association](#) and [covered by Axios](#).

- American parents were more likely than those who are not parents to list **money** (80% v. 58%), the **economy** (77% v. 59%), and housing costs (72% v. 39%) as significant sources of stress.
- Parents were also more likely to feel **the past two years of the pandemic are a blur** (72% vs. 59% non-parents).
- Further, parents also said that **disruptions to and uncertainty** surrounding school and/or daycare were contributing to their stress, with (72%) **saying disruption to their child's schedule due to the COVID-19 pandemic is stressful for them (72%)**.

CHILD DEVELOPMENTAL LOSSES WEIGH ON PARENTS, LARGE MAJORITY EXPRESS CONCERN FOR CHILD(REN)'S:



PARENTS AGREE THAT:



STRESS IN AMERICA™ 2022: COVID SECOND ANNIVERSARY

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Implication:

To mitigate the parental stress on working parents, employers should be aware of how childcare benefits could retain and attract talent as back in September 2021 with Yahoo! Finance we found that two-thirds (68%) of working parents said they would be more likely to accept an offer from an employer that offers flexible scheduling for childcare needs and (62%) said they would be more likely to accept based on the offer of a monthly child care stipend.

Section:

03

Topic:

CANNABIS TOURISM IS NOW A \$17 BILLION INDUSTRY, AND IT'S JUST TAKING OFF: FORBES-HARRIS POLL

Introduction:

According to [our latest story with Forbes](#), we find that from marijuana farm tours to “bud and breakfast” hotels, American destinations are discovering that “cannacations” aren’t just for stoners anymore.

- One in five (22%) Americans report that they have chosen a destination based on the recreational cannabis status of the area (cannabis users: 51%, Millennials: 43%).
- And while only (30%) of Americans 21+ said they consider legal recreational cannabis status as important when choosing a destination for vacation, two-thirds (65%) of cannabis users and (50%) of Millennials **find it important**.
- For those likely to partake, most (51%) said they would use cannabis while resting and relaxing, followed by watching live music (45%), socializing at a bar/restaurant (40%), during general tourist attractions (39%), during outdoor activities (38%), or visiting museum/art exhibits (37%).

Implication:

As legalization spreads and stigmatization decreases, companies should be aware that legal cannabis lifts other businesses, too: Out of \$25 billion in legal cannabis sales in 2021, Forbes estimates that as much as \$4.5 billion was driven by tourists, who poured an additional \$12.6 billion into restaurants, hotels, attractions, and other shops – as well as into state and municipality tax coffers.

Section:

04

Topic:

THE BRANDS THAT TRANSCEND POLITICS: AXIOS-HARRIS POLL

Introduction:

Last week we released the [2022 Axios Harris Poll 100 rankings](#), and while consumer sentiment about certain companies can vary drastically depending on their political affiliation, there are some brands that are able to [cut through the partisan divide](#).

- Grocery brands like Trader Joe's, Wegmans and H-E-B are some of the [most reputable companies](#) in America across the political spectrum, in large part because they have focused on **servicing local communities** and have avoided taking very public political positions.
- Democrats used to be more likely than Republicans to favor "green companies," but this year's data shows that green companies, including Patagonia and auto companies that are investing in electric vehicles, are **ranked highly across the aisle**.
- Tech companies that focus on producing hardware, like IBM, Dell, and Apple, also rank highly among both parties, while social media firms are largely distrusted by both.

Most reputable companies, by party

Crossover brands are highlighted; Survey of 33,096 Americans conducted March 11-April 3, 2022

Republican	Democrat
1 Chick-fil-A	Samsung
2 H-E-B	Target
3 Hobby Lobby	Publix
4 Tesla	Trader Joe's
5 Trader Joe's	Patagonia
6 Patagonia	Toyota
7 Home Depot	IBM
8 Hershey	Microsoft
9 My Pillow	Nike
10 Blue Cross Blue Shield	H-E-B
11 Kroger	Honda
12 Wegmans	Hershey
13 USAA	Apple
14 General Motors	General Electric
15 Apple	Pfizer

Data: The Harris Poll; Chart: Kavya Beheraj/Axios

Implication:

Company leaders do need to be aware that their own party identification can dramatically sway company perception among consumers: Tesla ranked in the top 10 most reputable companies for Democrats in 2021, but this year, fell to 47th out of 100 among Democrats but ranked 4th among Republicans.

Section:

05

Topic:

INSTAGRAM CASE STUDY – REPUTATION IN CRISIS: HARRIS BRAND PLATFORM

Introduction:

In our latest [Harris Brand Platform](#) case study, we analyze the reputation damage the Facebook Files' release had on [Instagram's brand equity](#), and the subsequent steps they took to repair their brand perception.

- **Context:** In September 2021, [The Wall Street Journal released](#) Facebook's internal research (The Facebook Files) on the potential psychological harm that social media use can have on teens.
- The Files' release initially lowered Instagram's brand equity – **dropping from 52.7 in August to 45.3 in October** – but was able to recover by January 2022 (51.9), with the greatest increases in **familiarity (+9.1)** and **consideration (+8.9)**.
- **Mitigation efforts:** Instagram systematically addressed the public perception disaster, [including refuting WSJ's characterization of the data](#), halted the development of Instagram Kids, focused on developing parental supervision tools, and launched Project Daisy, a pilot version of Instagram that hides likes to reduce anxiety.
- By January, Instagram saw an uptick in the **trial (+8.5)** and **recommend (+4.8)** phases of the brand's sales conversion funnel as more people were open to trying the app.

Implication:

Instagram's story is reassuring for brands who suffer bad press at some point in their company's lifecycle that in addition to refuting criticism with data, brands can draw attention away from a negative narrative by instead developing positive narratives.



WAVE 108

WAVE 108 INTRODUCTION

The following research was conducted between **May 13 - 15, 2022** by The Harris Poll. Fielded among a nationally representative sample of **2,000** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

MILLENNIALS, MEN, & MUSK FOR TRUMP'S TWITTER RETURN

Introduction:

While [Musk's official purchase of Twitter still hangs in limbo](#), his announcement of reinstating former President Trump's Twitter account has made headlines and our weekend polling reveals the debate is still going strong:

- In mid-April, we [found](#) that Republicans, Millennials, and men were Musk's strongest supporters in his announcement to purchase Twitter, and this weekend's polling found that they are also the most supportive of Musk's plan to reinstate former President Trump's Twitter account (88%, 64%, 60%, respectively).
- **Of those in support of Trump's reinstatement:** (70%) of gen pop claim he should be allowed back due to freedom of speech and (39%) believe banning politicians creates a dangerous precedent.
- **On the other side:** Democrats (67%), Black Americans (58%), and women (50%) were more likely to oppose the potential reversal of Trump's Twitter ban.
- **Among those in opposition:** (67%) of gen pop believe that any account, even public officials, should be banned if they are spreading **misinformation**.
- **What's more is that IF Trump's account were to be reinstated, Twitters' user demographics will likely shift:** Republicans (45%), Millennials (42%), and men (35%) say they **are more likely to use Twitter** if Trump's account is reinstated, meanwhile, (51%) of Democrats and (36%) of Gen X and Boomers are **less likely to use Twitter**.

Implication:

Tech companies will have to be cognizant and transparent in their social media policies when engaging with their consumer bases as we found back in October 2021 that over half of Americans (57%) say it's difficult for media companies to know where to draw the line when it comes to someone practicing their first amendment right or spreading hate speech.

Section:

02

Topic:

NOT YOUR PARENTS' RETIREMENT-BOOMERS & GEN X REDEFINE THEIR GOLDEN YEARS: EDWARD JONES-AGE WAVE-HARRIS POLL

Introduction:

Baby boomers and Gen X are reimagining retirement, according to our new study in partnership with Edward Jones and Age Wave, as covered by [Yahoo! Finance](#) and [CNBC](#).

- Only a quarter (27%) of pre-retirees and retirees view retirement similarly to their parents' vision of "rest and relaxation" and instead, more than half (55%) view today's retirement as "**a new chapter in life.**"

- **Retirement isn't a number anymore:** Pre-retirees and retirees say their "new chapter of life" will start after they stop working full-time (34%), begin receiving Social Security and/or a pension (22%), leave their career or job (17%), or when they achieve financial independence (17%) – only (10%) said retirement starts at a specific age.
- However, for almost 3 in 5 surveyed, **retirement may even include working** in some capacity: (22%) part-time, (19%) cycle between work and leisure, and (18%) full-time.

Implication:

Implication: Ken Dychtwald, psychologist, gerontologist, and founder and chief executive of Age Wave and Mona Mahajan suggests that "we have to remove this belief that everyone should stop working at 65 for three reasons: we can't afford to, a bit of work is good for us, and work keeps us modern and socially connect with people of all ages."

Section:

03

Topic:

AMERICANS ARE STEPPING OFF THE “HAMSTER WHEEL” & REDEFINING WHAT SUCCESS LOOKS LIKE: FORTUNE-HARRIS POLL

Introduction:

After two years of a life-altering pandemic, Americans are reevaluating their priorities when it comes to work and how it impacts their overall satisfaction according to our latest survey as [covered by Fortune](#).

- Nearly two-thirds of Americans said their idea of a happy life shifted during the pandemic and the shift among younger workers was even more dramatic: (74%) of millennials and (68%) of Gen Z are reassessing their lives and goals.
- Over half of Americans (55%) feel they've been sold false promises about what would make them happy and about (70%) of millennials feel deceived.

- **Willing to take big swings in their life:** About (69%) of millennials surveyed reported that they're actively seeking alternative lifestyles (e.g., moving cross-country, switching jobs, etc.) to create a happier life than they envisioned for themselves pre-pandemic.

Implication:

“We started to see a [new] set of expectations about how people want to work, and how they're willing to work now,” Libby Rodney, Chief Strategy Officer at The Harris Poll, says. “It's really shifting the way that we think about energy, our personal wellbeing—and managing that energy over money.”

Section:

04

Topic:

FANS DIVIDED ON MLB'S NEW SPONSORED PATCH PROGRAM: FRONT OFFICE SPORTS-HARRIS POLL

Introduction:

Following the announcement that MLB would allow its teams to place a sponsored 4-by-4 patch on jersey sleeves starting in 2023, reception to the addition of on-uniform advertising is mixed according to our new polling data [with Front Office Sports](#).

- (39%) of Americans polled at least somewhat support MLB's decision to **permit advertisers on uniforms**, with over half (51%) of MLB fans supporting the decision.
- **Americans understand the economics of the situation:** (83%) at least somewhat agree that sponsorships are a good source of revenue for the teams, and (81%) see it as a good source of publicity for the brands.
- Yet, (56%) of adults at least somewhat see the ad placements on jerseys as **"tacky"** (56% of MLB fans, 54% of non-fans).

Implication:

The MLB will need to be tactful with their use of on-uniform advertising as back in August 2021 we found that a quarter of NFL fans said they would enjoy watching games less if they added sponsorships to the jerseys.

Section:

05

Topic:

TECHNOLOGY & TELECOMS: AN INDUSTRY SNAPSHOT

Introduction:

Our [recent report](#) on the state of the technology & telecoms industry explores consumer sentiment towards 5G, smart devices, and navigation app Waze's growth. [Using Harris Brand Platform data](#), we rank the leading technology brands by equity and growth. Here's what we found:

- An almost equal number of U.S. adults describe **smart devices as essential (51%)** as those **who do not (49%)**.
- While consumers attribute many positive attributes to smart devices, **helpful (85%), convenient (83%), and informative (78%)**, almost half consider them to be **invasive (48%) and overused (43%)**.
- Many consumers express uncertainty as to whether **5G technology is harmful to people's health (41%) or the environment (40%)** but despite concerns about 5G, more than half of U.S. adults expect **5G access will help people (62%) or businesses (65%)** be more productive.
- **TikTok (+3.0%)** and **Instagram (+2.8%)** topped the list of **highest growth brands** in brand equity from Q4 2021 to Q1 2022.

Implication:

The only thing that remains consistent with technology is that it is always evolving. Companies must remain aware of which advancements excite consumers and what brings apprehension, so they can appropriately tailor their messaging and consumer education.



WAVE 107

WAVE 107 INTRODUCTION

The following research was conducted between **May 6- 8, 2022** by The Harris Poll. Fielded among a nationally representative sample of **2,006** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

J K L MILLENNIALS NFTS

Introduction:

The [Wall Street Journal reported](#) that the NFT market is collapsing as the sale of non-fungible tokens saw a 92% decline from September 2021 to last week. However, NFTs may still have a future with Millennials, according to our latest poll:

- **Who's investing?** While only 28% of the public say they invest in cryptocurrencies, 39% of Gen Z and 51% of Millennials do (vs 26% of Gen X and 6% of Boomers), along with 39% of Hispanic and 37% of Black Americans (vs. White: 26%).
- Regarding NFTs, close to a fifth of Millennials (18% vs. 8% of the general public) regularly purchase NFTs and a similar number (20% vs. 11%) have purchased a few already.
- Millennials are also interested in **purchasing NFTs to gain membership access** (24% vs. 12% of the general public), to get special access to an event (24% vs. 12%), to use as a social media picture (24% vs 11%), and to have as virtual memorabilia (23% vs. 11%)

Implication:

While Millennials are the most likely generation to believe that NFTs are an item with lasting value, the majority (54%) still believe that they are just a temporary consumer phase – which 70% of the general public agrees with.

Section:

02

Topic:

20 BRANDS GAINING GEN Z LOVE IN EARLY 2022: AD AGE- HARRIS POLL

Introduction:

Ad Age released the second quarterly [Ad Age-Harris Poll Gen Z Tracker](#). Using data from [Harris Brand Platform](#), the tracker ranked the top 20 brands by brand equity growth in Q1 2022 among Gen Z consumers, ages 18-24.

- Square saw the **highest brand equity growth** (+12.2) in Q1, reaching young entrepreneurs through a YouTube series that provided business tips.
- Several brands, including Whirlpool (+11.1), Neutrogena (+9.6), and Marriott Bonvoy (+9.5), achieved growth from engaging **TikTok content** and **influencer partnerships**.
- Lululemon (+10.4) and Hertz (+8.5) benefited from **leaning into sustainability**. Lululemon launched a clothing resale program, and Hertz purchased a fleet of EVs.
- Calm (+8.7) and Old Spice (+10.5), gained traction by **engaging with pop culture** beloved by Gen Z, including Netflix series (Bridgerton, The Witcher) and singers (Harry Styles).

Implication:

According to The Harris Poll CEO Will Johnson, “pop culture references are revered and rewarded by Gen Z” and are a key way to develop positive long-term relationships.

Section:

03

Topic:

MENTAL HEALTH: CVS HEALTH- HARRIS POLL “NATIONAL HEALTH PROJECT”

Introduction:

According to the latest CVS Health-Harris Poll National Health Project survey, as covered by regional outlet [CBS Hartford](#), we found that younger Americans are the most likely to be dealing with anxiety and depression. However, our data reveals that they are also leading positive trends in mental health:

- Younger Americans are the most likely to be **utilizing professional help** from a therapist, counselor, or psychiatrist (Gen Z/Younger Millennial: 32%, Older Millennial: 38% vs. General Public: 22%).
- They are also optimistic that they will be able **to get back to their pre-pandemic mental health state** after COVID-19's toll (Gen Z/Younger Millennial: 71% vs. General Public: 68%).
- The optimism may be in part to their **coping skills** such as getting outdoors (Gen Z/Younger Mill: 71%), at-home workouts (57%), meditation and relaxation apps (38%), and using CBD/cannabis products (42%) (vs. General Public: 67%, 50%, 27%, 27%, respectively).

Implication:

“They’re willing to talk about it, normalize it, destigmatize it and just say ‘Hey, I’m just not okay and I want to do something about it,’” Cara McNulty, President of Behavioral Health and Mental Wellbeing at CVS Health, said. “And so, there’s a lot we can do as communities, but we also need to let people understand that it’s okay not to be okay and to seek help.”

Section:

04

Topic:

SOCIAL MEDIA IS EFFECTIVE FOR SCREENING JOB APPLICANTS: EXPRESS EMPLOYMENT PROFESSIONALS-HARRIS POLL

Introduction:

While networking remains one of the best ways to land a new job, social media may be its new competitor according to our latest survey in partnership with Express Employment Professionals and [featured in Forbes](#). Here's what we found:

- Seven in 10 (71%) U.S. hiring decision-makers agree that looking at candidates' social media profiles is an effective way to screen applicants and (67%) say they use social networking sites to research potential job candidates.
- Of those using social networking to research candidates, more than half (55%) have found content that caused them not to hire the applicant.

- **Don't delete your profiles:** 1 in 5 (21%) hiring decision-makers even said they would not be likely to consider a candidate who doesn't have an online presence.

Implication:

"Social media can be a great tool for connecting with others, but it's important to remember that potential employers are looking at your accounts, too," Express CEO Bill Stoller said. "Take the time now to clean up your online presence to avoid the heartache later of losing out on the job."

Section:

05

Topic:

23% OF WORKERS SAY EMPLOYERS ARE OFFERING NEW MENTAL HEALTH BENEFITS: FORTUNE-HARRIS POLL

Introduction:

Although most Americans are covered by health insurance, a [U.S. Government Accountability Office report](#) found that coverage doesn't guarantee access to mental health treatment. However, according to our survey in partnership with Fortune, many employers are trying to fill the gaps.

- **Context:** 27% of Americans reported symptoms of anxiety or depression within the last two weeks, according to the National Center for Health Statistics of a recent estimate [from the Household Pulse Survey](#).
- While over a third (36%) of employees say their companies have always offered some kind of mental health support, nearly 23% of workers say their employer **has introduced new mental health services** during the pandemic.
- **The mental health services are appreciated:** About two-thirds (67%) of workers say mental health services offered by employers are beneficial, with Millennials, parents with children under 18, and remote workers most likely to say such services are beneficial.

- Among employers, popular mental health supports being offered are employee assistance programs (EAPs) (28%), reading material and educational resources (21%), time off for a mental health day (19%), and tele-doc mental health services (19%).

Implication:

Despite the great strides corporate America has made in the mental health space, 41% of workers still say their company doesn't offer any mental health services, which could be negatively impacting operations as depression is estimated to account for \$44 billion in losses to workplace productivity.



WAVE 106

WAVE 106 INTRODUCTION

The following research was conducted between **April 22 - 24, 2022** by The Harris Poll. Fielded among a nationally representative sample of **1,996** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

THE DIFFERING CONCERNS BETWEEN GEN Z AND BOOMERS

Introduction:

While there is overall concern about societal stressors like inflation, crime rates, and racial inequity among all Americans, there are, however, distinct generational divides between Gen Z and older Boomers.

- While (62%) of Boomers report being very concerned about the economy, inflation, and jobs, less than half of Gen Z Americans (45%) say they are very concerned.
- Additionally, over 6 in 10 Boomers (62%) are very concerned about crime rates in the U.S., close to double that of Gen Zers who are very concerned (33%).
- However, Gen Z was more likely to be very concerned about racial inequity (48%) than Boomers (30%) – the disparity could be partly attributed to [Gen Z being the most racially and ethnically diverse](#) U.S. generation yet.
- And more Gen Z reports being very concerned over affording their living expenses (45%) than their older Boomer counterparts (36%).

Implication:

Companies should seek to better understand the varied concerns among different aged Americans – especially as it may relate to consumerism and their workforce.

Section:

02

Topic:

EARTH DAY GREEN MESSAGING: 3 STRATEGIES TO GUIDE BRANDS: AD AGE-HARRIS POLL

Introduction:

Environmentalism is a widespread and largely popular movement, so how can brands distinguish their green messaging and connect with consumers who care? In [partnership with Ad Age](#), we surveyed American consumers to uncover the current environmental landscape and discover how brands can stand out.

- The majority of adults (76%) are concerned about **the health of the environment** and/or the threat of **climate change**.
- More Americans (80%) **believe that corporate sustainability efforts** rather than individuals (57%) play a key role in combating climate change.
- Consumers prefer when ads explain **what actions a company takes to combat climate change** rather than announcing a company's monetary donation towards environmental efforts.
- Almost 1 in 5 Americans said that they would be less **likely to support a brand** that ran ads focusing on humans' negative impact on the environment.

Implication:

According to Harris Poll CEO Will Johnson, "Not only do big corporations have the standing to talk about the environment—it would behoove them to, as more than three-quarters of U.S. adults say that they would think more highly of brands that act to protect the environment."

Section:

03

Topic:

WORSENING ALLERGY SEASONS: IS CLIMATE CHANGE TO BLAME?: HEALTHDAY- HARRIS POLL

Introduction:

Global warming is likely to cause longer and more severe allergy seasons as increased temperatures and CO2 result in larger plants and greater pollen production. Partnering with [HealthDay](#) we surveyed 2,000 U.S. adults on their experience with seasonal allergies.

- Between (10 to 30%) of the world's population **suffers from seasonal allergies**, and the percentage is increasing.
- By 2018, pollen counts were (20%) higher than in 1990, and by 2100, **pollen emissions could increase** by up to (40%).
- Almost three-quarters (74%) of allergy sufferers say **symptoms negatively impact** their overall quality of life.
- More than (70%) of allergy sufferers say symptoms **prevent them from getting a good night's rest**.

- **About half of allergy sufferers** agreed with a series of allergy-related statements, including: "I feel like **my seasonal allergies are getting worse every year.**"

Implication:

Kathy Steinberg, vice president at the Harris Poll said, "Other points in the survey suggest that the situation is only going to get worse." With climate change likely worsening the length and severity of allergy season, tackling global warming could be the answer to halt this trend.

Section:

04

Topic:

THE DISCONNECTS STALLING CONNECTED HEALTHCARE: ZS- HARRIS POLL

Introduction:

While the healthcare industry has become increasingly digitized, significant disconnects remain, negatively impacting both patients and providers. In our latest survey, [in partnership with ZS](#), we examine the path to connected healthcare and how companies can develop a solution.

- While (80%) of primary care providers think their patients feel cared for, **only (42%) of U.S. adults report feeling cared for by their doctors.**
- The majority (79%) of U.S. adults would regularly **share vital sign data with a healthcare provider** if this information was used to improve their health.
- **About one-third of healthcare consumers use connected options**, including online health portals (38%), health tracking devices (29%), and telehealth options (23%).
- While (73%) of consumers would like to access healthcare anytime, only (56%) of doctors agree.

Implication:

Healthcare consumers and providers agree that a more connected healthcare system would allow for increased direct communication, improved diagnoses, earlier detection of health issues, and overall improved community health.

Section:

05

Topic:

HOME CARE & PRODUCTS: AN INDUSTRY SNAPSHOT

Introduction:

Our [recent report](#) on the state of the home care industry explores consumer sentiment towards pet food purchases, cleaning habits, and mattress-in-a-box brand Purple's growth. Using [Harris Brand Platform](#) data, we rank the leading home care brands by equity and growth. Here's what we found:

- Fifty-three percent of Millennial pet owners purchased **pet food made from natural ingredients**, 34% purchased **organic pet foods**, 31% purchased **CBD pet products**, and 18% purchased **food for alternative diets** (e.g., vegan, raw).
- Men (39%) reported more often than women (27%) that they **purchased specialty food products to treat their pets**.
- Twenty-seven percent of U.S. adults say that the **features they look for in a cleaning product have changed** because of the **COVID-19 pandemic**.
- **Clorox** topped the list of home care brands, with a **brand equity score of 70.1%**, while **Pedigree** pet food saw **the greatest brand equity growth (4.4%)** among home care brands from Q4 2021 to Q1 2022.

Implication:

Americans' home care needs and preferences evolved during the COVID-19 pandemic. Brands must understand shifting consumer priorities to effectively develop and market



WAVE 105

WAVE 104 INTRODUCTION

The following research was conducted between **April 15 - 17, 2022** by The Harris Poll. Fielded among a nationally representative sample of **2,028** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

MILLENNIALS FOR MUSK

Introduction:

Unlike Twitter's Board of Directors who are [strongly opposed to Elon Musk's buyout offer](#), a plurality of Americans (59%) support the billionaire's offer, especially Millennials (71%, 65%). However, not all Americans would be pleased with the business transaction.

- Millennials are more likely to believe that Musk would have a positive impact on Twitter's **profitability** (75%), **free speech** (75%), and **improving** Twitter as a product (72%).
- In comparison, Gen Z was more likely – even more than Gen X and Boomers – to think that Musk would actually **have a negative impact** on Twitter's profitability, free speech, and product improvements (40%, 39%, 45%)
- The difference is in part to philosophy, as Millennials were again more likely to think that billionaires purchasing media companies **would be a good thing** for free speech on the internet (73%), freedom of the press (72%), and even democracy (71%) compared to Gen Z (57%, 59%, 52%).

Implication:

The difference in opinion between Gen Z and Millennials should remind companies that the opinions and interests of young Americans can vary widely and should not be homogenized when deciding their latest marketing and operational processes.

Section:

02

Topic:

GAS PRICES, INFLATION, MAKE SOME WANT TO WORK FROM HOME AS OFFICES CALL WORKERS BACK: USA TODAY- HARRIS POLL

Introduction:

Workers are returning to the office as more employers demand their staff be in-person at least part of the time. But, according to our survey in [partnership with USA Today](#), rising inflation is causing concern for some workers about how much a return will cost them.

- Over three-quarters of employed Americans (78%) are concerned about being **able to afford the price of gas for their commute**, along with the price of food (72%), the price of public transportation (38%), paying for a new office wardrobe (34%), and parking fees (33%).
- **Millennial employees** are the most worried with (76%) fretting about the price of gas, while (73%) are worried about the price of food and (49%) are concerned about the cost of public transit.

- To combat commuting costs, one-fifth of workers received a **raise** (20%) and/or **bonus** (19%) to help with commuting costs while others are able to work from home whenever or receive **reimbursements for** gas, meals, parking, and public transit fares (17%, 13%, 13%, 12%, 11%). Yet (44%) of workers say their workplaces **aren't helping to cover the costs of commuting**.

Implication:

Companies will have to try all kinds of initiatives to make the return to the office something their employees can be excited about, whether it be investments in food and drinks, or helping subsidize commutes.

Section:

03

Topic:

GLOBAL EXECUTIVES SUSPECT THEIR OWN COMPANIES OF “GREENWASHING”: GOOGLE CLOUD-HARRIS POLL

Introduction:

According to our latest survey with Google Cloud and covered by [Axios](#) and [Fast Company](#), senior executives at large companies are prioritizing sustainability goals, yet many say that “green hypocrisy exists” and even their own companies overstate sustainability progress.

- Among over a thousand C-Suite or VP-level executives across 16 global markets and industries, senior leaders face **barriers** to making progress on sustainability, especially **difficulties in measuring and verifying progress**.
- Eight in 10 (80%) of executives rate their company above average for their sustainability work. However, just (36%) say their organizations **have measurement tools** in place that allow them to track their progress in detail.

- More than half (58%) say their organization is **even guilty of greenwashing** (i.e., purporting to be environmentally conscious for marketing purposes but actually isn't making any notable sustainability effort).

Implication:

Companies need to be authentic in their sustainability measures and metrics for the betterment of the environment, but they also need to recognize that greenwashing could impact their demand as environmental-conscious consumers switch away.

Section:

04

Topic:

CLIMATE, ENVIRONMENT SHAPE GEN Z LIFE DECISIONS: 4-H- HARRIS POLL

Introduction:

In partnership with 4-H, and [covered by Axios](#), we found that 8 in 10 teenagers expect climate change and other environmental forces to affect big decisions like where they live and whether to have children. Here's what else teenagers are saying:

- More than three-quarters of teenagers (77%) ages 13 to 19 feel that they **have a responsibility** for protecting the future of the planet and the same share feel empowered to act.
- Yet just (45%) of teenagers ages 13-19 believe political and global leaders **are taking meaningful action** to protect the environment.
- **They also see room for improvement locally.** Only a slight majority (55%) say their community makes a “meaningful” effort to prevent environmental hazards to protect citizens.
- The lack of action is problematic as (84%) of teenagers agree that “if we don’t address climate change today, it **will be too late for future generations**” and the same share believes climate change will affect “**everyone**” in their generation due to geopolitical instability.

Implication:

The sense of responsibility for the environment among the majority of teenagers will impact not only the environment but the future of politics and businesses. Companies will need to be aware of how teenage priorities will change the marketplace as they age into adulthood.

Section:

05

Topic:

TAXATION SURVEY REVEALS CYNICISM – AND A WILLINGNESS TO CHEAT: CHICAGO TRIBUNE-HARRIS POLL

Introduction:

Are you tempted to fudge a little bit as you fill out your income tax return? And if you did, would it be a crime? For many Americans, the answers to those questions are not as clear-cut as one might expect according to our latest article in the [Chicago Tribune](#).

- More than half of Americans (57%) believe they are **taxed at unfairly high rates**, and the sentiment extends through every cohort – age, education, gender, income, and race/ethnicity.
- Nearly two-thirds of U.S. adults say that deliberately misreporting income is tax evasion. But a slight majority (52%) say there's no difference between underreporting and using legal loopholes to lessen what one owes.
- Nearly 6 in 10 U.S. adults say it **would be smart to use loopholes to owe less**, and the share increases to two-thirds among those making more than \$100,000 annually and college grads.

Implication:

According to our CEO, Will Johnson, in the meantime until a tax code reform, when you feel that surge of bitterness over writing out another big check to the government this month, know that you're not alone: Most Americans feel the same way.



WAVE 104

WAVE 104 INTRODUCTION

The following research was conducted between **April 8 - 10, 2022** by The Harris Poll. Fielded among a nationally representative sample of **2,121** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

INFLATION IS RECASTING AMERICANS' RELATIONSHIP WITH MONEY – AND EACH OTHER: BLOOMBERG-HARRIS POLL

Introduction:

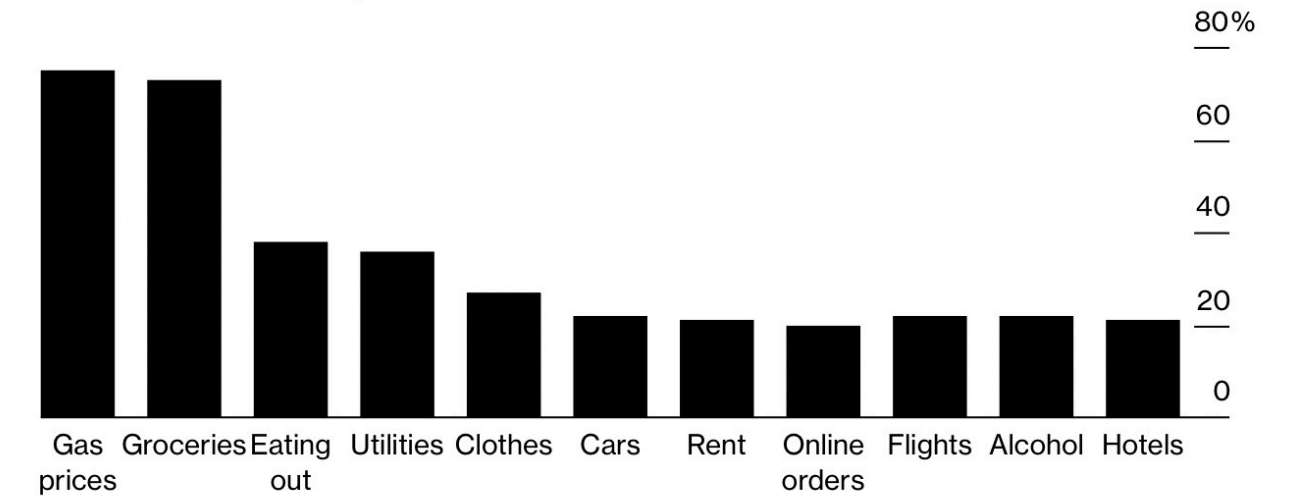
In our [latest survey in partnership with Bloomberg](#), we found that (84%) of Americans plan to cut back spending as a result of price spikes. It's also changing consumer behaviors in some unexpected ways:

- More than 7 in 10 report feeling the effects of inflation the most in gas prices and groceries, which isn't surprising given that consumer price index data shows gas prices surged (48%) and food rose (8.8%) from a year earlier.

Budget Impact

The most noticeable price gains are in gas and groceries

■ % of Americans seeing effects of inflation

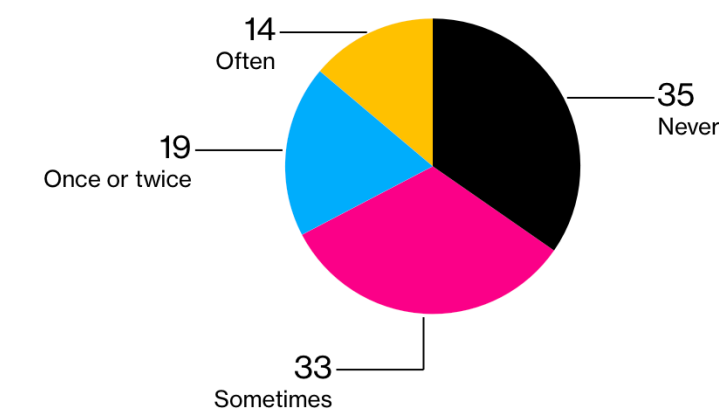


Source: The Harris Poll

- **Inflation may be the new excuse for skipping plans:** Nearly half (47%) of Americans are using rising prices as an excuse to not buy or do something even when price wasn't an issue (52%), and (51%) of high-income households say they have done so (v. 44% of low-income households).

The inflationary excuse

Percentage of people who have cited price increases as a reason not to buy or do something, even when cost was not a factor



Source: The Harris Poll

- **Other surprises?** Pets are ranking higher than humans as while (71%) say they are likely to sacrifice the quality and quantity of spending on goods for themselves and/or their spouses or partners (56%), only (48%) would cut back on spending for their animals.

Implication:

While over half of Americans do report some upsides to inflation – cutting back on impulse purchases, increased pay, and debts are easier to pay off – that doesn't make their outlook any brighter. Only a quarter say they see inflation ending this year, while nearly a third expect it to last into 2023 and a fifth indefinitely.

Section:

02

Topic:

MOST AMERICANS WOULD GET A COVID BOOSTER SHOT IF RECOMMENDED: STAT-HARRIS POLL

Introduction:

As the FDA panel weighs the ongoing use of booster shots for COVID, our latest [survey with STAT](#) finds that 6 in 10 Americans have already decided they will get another booster if it's recommended for them.

- **So, who's getting the shot?** Not surprisingly, (73%) of **Baby Boomers** and more than two-thirds of **Democrats** plan to get a booster, if recommended, compared with (48%) of Gen Zers and just over half of Republicans.
- Additionally, (73%) of Asian individuals and (65%) of white respondents are likely to receive a second booster, with Black and Hispanic individuals are a **bit more hesitant** (54%, 43%, respectively).
- However, just under one-quarter of adults indicated they **will only receive** a second booster shot if a **new variant arises** or there is a **surge in COVID cases** in their area, and (18%) have no plans to get a booster at all.
- **Getting back to their lives:** Among those surveyed, (62%) said they are running errands or shopping without wearing a mask, (57%) are eating at restaurants unmasked, and (51%) are going to work without wearing a mask.

Implication:

Our polling is feeding into a larger national discussion about the ability to create a public health policy around regular booster shots for COVID, and the data underscores some of the challenges that policymakers may face since the booster shots have proved divisive among different groups.

Section:

03

Topic:

AMERICANS AREN'T READY FOR THE MASK MANDATE FOR AIR TRAVEL TO END: FORBES-HARRIS POLL

Introduction:

In less than a week, the federal mask mandate for public transportation is due to expire, but our latest [survey with Forbes](#) indicates that the majority of Americans are still not quite ready to see it go.

- Most Americans (60%) support extending the mask mandate, and a third (32%) say they “strongly support” the Administration in **extending the mandate** (v. strongly oppose: 19%).
- Vaccinated Americans were **more likely to support an extension** (62%) compared to their unvaccinated peers (50%).
- **The partisan differences are telling:** Among Democrats, (70%) support keeping the mandate in place compared to only (50%) of Republicans.
- Currently, a quarter of Americans (26%) **aren't comfortable flying** given the COVID pandemic, and time will tell if that number increases if and when the mandate expires.

Implication:

Though masks may not be as common as they once were in America, passengers are likely to seek the safety and security of mask wearing while in such close proximity to other passengers for the foreseeable future.

Section:

04

Topic:

WITH INFLATION AT A 40-YEAR HIGH, WHO FEELS BETTER OFF TODAY? FORTUNE-HARRIS POLL

Introduction:

Overall, inflation is reducing living standards based on our new survey and [featured in Fortune](#), as only a third of those whose income rose in the past year had their pay match or surpass inflation.

- **What does that mean?** Two-thirds of households – people whose raises lagged rising prices, whose incomes didn't budge, or actually fell – **are now worse off financially** than they were in 2021.
- **Wealthy households and college students are doing the best** as two-thirds of both say their household income is higher today than it was a year ago, and half have boosted their savings over the past five years.
- At the other end of the income spectrum, **things are rockier since** 4 in 10 households with annual incomes of less than \$50,000 say they **cannot afford essentials** like food and housing, two-thirds haven't been able to put money into savings or investments, and (60%) don't have enough savings to cover an emergency.

- **A bright spot:** A third of household heads with a high school education or less say their earnings rose faster or kept up with inflation over the past year, and for those in the \$10,000-to-\$49,900 income bracket, the share jumps to (41%).

Implication:

“Vulnerable households have been able to defy inflation, but what’s surprising is that the less fortunate and the more fortunate feel they are coping almost equally with the worst bout of inflation in 40 years,” according to Harris Poll CEO, Will Johnson.

Section:

05

Topic:

CLOROX CASE STUDY – SUCCESS THROUGH HARDSHIP: HARRIS BRAND PLATFORM

Introduction:

Using Harris Brand Platform, we look at the [impact of Clorox's response](#) to the COVID pandemic on their brand equity and explore how a long-standing American brand found success by supporting consumers through the country's most difficult times.

- Throughout COVID, Clorox released instructional cleaning videos, and increased production, to help Americans during unprecedented lockdowns and uncertainty.
- From Q4 2020 to Q1 2021 the **company increased production of Clorox wipes** from 1 million to 1.5 million canisters every day.
- From Q1 2020 to Q1 2022, Clorox's **brand momentum (+7.7) and perceived product quality (+5.1) significantly increased.**
- From 2020 to 2022, the brand's **sales conversion funnel grew** across almost all phases of the consumer journey, especially **recommended (+7.8).**
- Several positive brand emotional attributes increased during the two years of COVID, especially **“Good Value” (+4.6), “Dependable” (+2.1), and Trustworthy (+2.0).**
- **Throwback:** The Clorox Company took the top spot in our [2020 Axios Harris Poll 100.](#)

Implication:

Other brands can look to Clorox to better understand how to communicate their value and actively guide consumers through difficult times, whether that is inflation, war, sickness, or political turmoil at-home or abroad.



WAVE 103

WAVE 103 INTRODUCTION

The following research was conducted between **April 1 - 3, 2022** by The Harris Poll. Fielded among a nationally representative sample of **2,097** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

SOME HESITANT PARENTS WARMING TO COVID SHOTS: AXIOS-HARRIS POLL

Introduction:

According to our latest survey as [covered by Axios](#), a growing segment of the wait-and-see crowd may be warming to the idea of getting a COVID-19 shot for kids 5 and under.

- More than one in four parents with kids 5 and under said **they were unvaccinated** and (46%) of those parents said they would be **likely to vaccinate their children**.
- The likelihood is up from (35%) in early February.
- It's also well above the low of (22%) later in February after a delay in Pfizer's FDA authorization process was announced.
- Three-quarters (75%) of vaccinated parents, along with (52%) of **Republican parents** and **rural parents**, respectively, said they would get their kids vaccinated.
- **Timing is split, however:** (58%) of parents would vaccinate their young child(ren) quickly after a vaccine authorization, while (42%) would wait for a period before doing so.

Implication:

While many polls tend to generalize the unvaccinated as partisan and unwilling to change their minds, this data shows more nuance to how parents weigh what's best for their kids, said John Gerzema, CEO of The Harris Poll.

Section:

02

Topic:

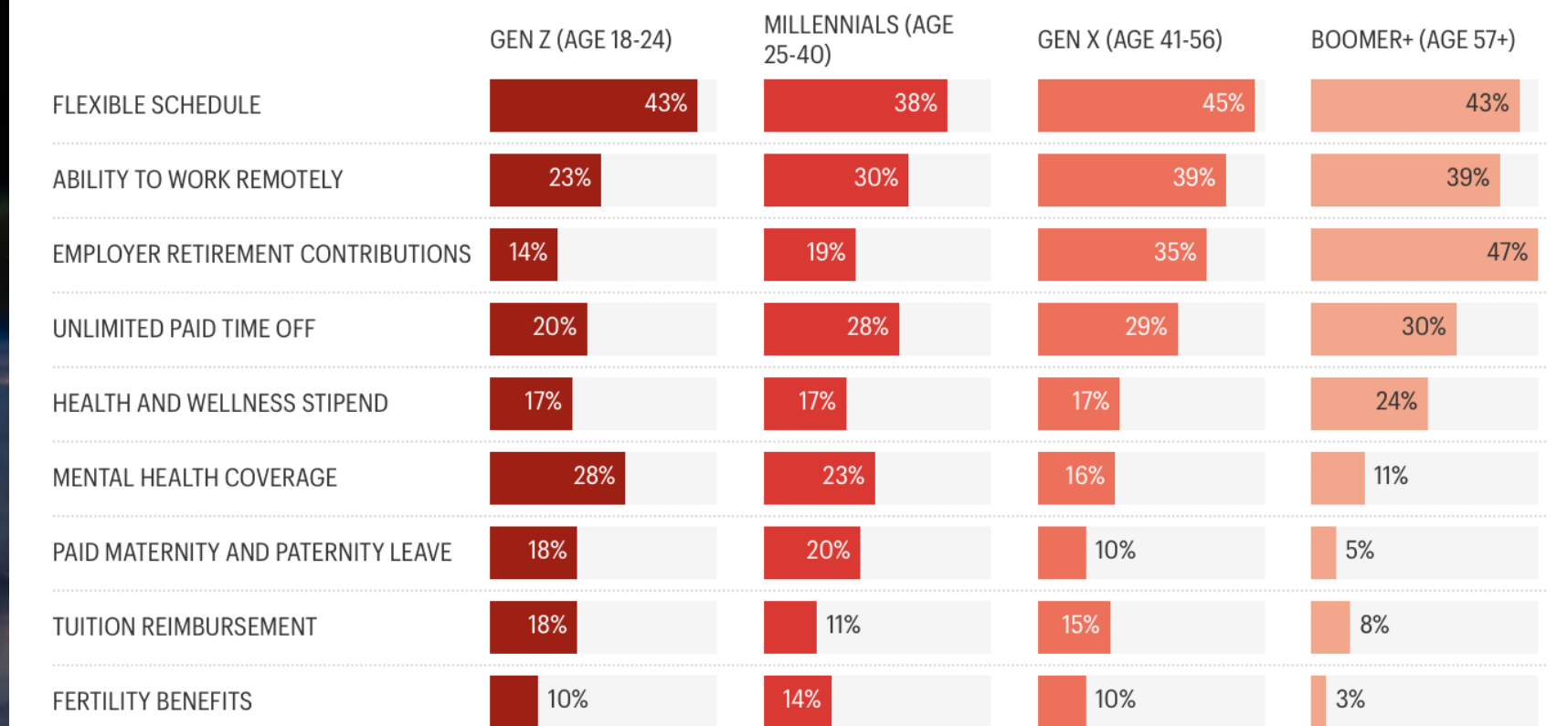
THE SECRET TO GETTING WORKERS OFF THE SIDELINES: FORTUNE-HARRIS POLL

Introduction:

With the U.S. seeing a decline in COVID-19 cases, employment levels are starting to pick up. But many Americans are still sitting on the sidelines, so in [partnership with Fortune](#), we raised the question: What will it take to lure them back to work?

- **Context:** About 1.4 million Americans working pre-pandemic [still haven't returned](#) to the workforce as of February, and the labor force participation rate in February [continued to be below](#) pre-pandemic levels.
- About (42%) of overall workers reported that a flexible schedule was the benefit most likely to get them to consider a job, followed by the ability to work remotely (34%) and expanded employer retirement contributions (32%).

Which of the following benefits would most influence you to consider a job with an employer?



DATA BASED ON SURVEY OF MORE THAN 2,000 U.S. ADULTS FIELDED FEBRUARY 18-20, 2022

SOURCE: THE HARRIS POLL

FORTUNE

- **Looking beyond benefits:** One senior economist predicts that a lack of savings will push more Americans to find a job, especially as U.S. personal savings rate [fell below pre-pandemic levels](#) for the first time in two years.

Implication:

Better work arrangements and benefits may help companies in the war for talent, however, most experts believe the U.S. still has a ways to go before the workforce sees maximum employment again, likely not until even 2024, [according to the Federal Reserve Bank of San Francisco](#).

Section:

03

Topic:

THE HIDDEN TOLL OF INSOMNIA: THE ALLIANCE FOR SLEEP-HARRIS POLL

Introduction:

According to our latest report, Wake Up America: The Night & Day Impact of Insomnia, in partnership with The Alliance for Sleep and [covered by Yahoo! Finance](#), trouble sleeping and insomnia have a massive impact on a variety of aspects across American lives.

- More than half of people with trouble sleeping **feel frustrated** and (70%) report that they are **desperate to find a solution**.
- Yet, despite sleep being seen as the third pillar of health, alongside diet and exercise, only (27%) of those with trouble sleeping **report their doctors asking** about their sleep habits and quality during routine visits.
- Nearly three-quarters (74%) of those with trouble sleeping believe they are knowledgeable about sleep and insomnia, yet, of those, two-thirds **believe common sleep myths** such as “your body can get used to functioning on less sleep” and “naps make up for the loss of sleep during the night.”
- Additional findings from the report detail how troubled sleeping and insomnia lead to **negative daytime effects across work and relationships**, along with an **enormous impact** on work productivity.

Implication:

According to Ruth Benca, MD, PhD, co-chair of The Alliance for Sleep: “We hope these survey results will spark a true wake up call for Americans, both patients and healthcare providers, demonstrating things need to change if we are to shore up sleep as the third pillar of health.”

Section:

04

Topic:

FOR THOSE CONSIDERING QUITTING, A THIRD JUST HAVEN'T FOUND A SUITABLE JOB YET: CAREERARC- HARRIS POLL

Introduction:

Among employed adults who considered resigning but stayed with their employer over the last 12 months, the top reason cited for staying was not having found a job that meets their requirements (32%), suggesting employers may see more resignations in the coming months.

- Employed women who considered resigning but stayed with their employer in the last year are **more likely** than their male counterparts to say they stayed because they **haven't found a new job that meets their requirements** yet (44% v. 24%).
- Two in three employed Americans (66%) **received a pay increase** in the past year, yet only (60%) of employed women report having received one compared to (71%) of men.

- **Pay is not the top reason for staying:** Of those employees that never considered resigning, they were more likely to say they like their job (49%), have a good work-life balance (43%), satisfied with their salary (40%), and have a flexible work schedule (35%) compared to those who have considered resigning (24%, 24%, 27%, 25%, respectively).
- Women were more likely than men to say a **flexible work schedule** was among their **reasons for staying** with their current employer (40% v. 26%), which [aligns with previous findings](#).

Implication:

As the Great Resignation slows down, employers need to lean into passive candidate recruiting strategies, such as reviewing remote and flex work policies and benchmarking compensation and benefits packages, to attract top candidates.

Section:

05

Topic:

CHICAGO-AREA WORKERS STILL FACING COVID'S MENTAL HEALTH EFFECTS: CRAIN'S CHICAGO BUSINESS-HARRIS POLL

Introduction:

After two years of the COVID-19 pandemic, Chicago residents know the illness's physical symptoms, but COVID's effects extend beyond the physical. COVID has sparked a wide-scale mental health crisis among Chicago's workers and families according to our latest survey with [Crain's Chicago Business](#).

- Three-quarters (73%) of city residents and (65%) of suburbanites are **concerned about mental health**, as it ranked third in a list of common public health concerns among Chicago-area residents (69% v. COVID-19 pandemic: 79%, public safety: 70%).
- Half of Chicago-based essential workers and (54%) of those living with one believe that the pandemic **harmed their mental health** (v. 44% of all Chicago-area residents).

- One-third (34%) of essential workers even report that the pandemic has had **a negative impact on their physical health** as well (v. 30% of all Chicago-area residents).
- Two-thirds (66%) of Chicagoans believe that essential workers' physical and mental health are **equally important** – yet only (16%) believe that local leadership has **done enough to prioritize** the mental health of essential employees.

Implication:

According to Harris Poll CEO, Will Johnson, “we need to stop measuring the city's health solely by the number of positive COVID tests, available hospital beds, and COVID deaths since Chicagoans' overall well-being cannot be measured by these hard statistics alone.”



WAVE 102

WAVE 102 INTRODUCTION

The following research was conducted between **March 25 - 27, 2022** by The Harris Poll. Fielded among a nationally representative sample of **2,028** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

MOST RECENT JOB QUITTERS HAVE REGRETS OR DON'T PLAN TO STAY IN NEW ROLE: USA TODAY-HARRIS POLL

Introduction:

Most of the millions of Americans who quit jobs during the Great Resignation regret the move, don't like their new position, or are already searching for a new gig, according to our survey [in partnership with USA Today](#). Here's what we learned:

- About 1 in 5 workers who quit during the past two years regret it and a similar share are **remorseful** about starting their new job.
- Even the majority of quitters who aren't second-guessing don't seem content as (26%) say they **like their new position enough to stay**, and a third are **already searching for a new position** with better working conditions, prestige or pay.
- Over one-third (36%) bemoan a loss of **work-life balance**, (30%) say their new role is **different** than expected, (24%) miss the culture at their previous job, (24%) say they didn't **thoroughly evaluate the pros and cons** of leaving.

- Further, fewer than 4 in 10 feel happy, successful, or valued in their new roles, and it may be explained by our [prior poll with Express Employment Professionals](#) that found (39%) of businesses said they've hired someone who didn't meet their usual qualifications.

Implication:

According to Harris Poll CEO, John Gerzema, "The lesson here is to do your research as USA Today's Paul Davidson reports companies in a pinch for talent are hyping jobs and Zoom interviews, which aren't the best medium for revealing actual company cultures."

Section:

02

Topic:

REFUGEES AROUND THE WORLD NEED OUR HELP, BUT AMERICANS DON'T SEE THEM ALL THE SAME WAY: FAST COMPANY-HARRIS POLL

Introduction:

[In a new poll in partnership with Fast Company](#), Americans showed more concern over Ukraine than other global refugee crises. That leaves relief groups struggling to fill the gap. Here's what we found:

- Americans are most aware of the **refugee crisis in Ukraine (95%) and most concerned (89%)**, whereas (92%) of Americans are aware of the crisis in Afghanistan yet only (77%) are concerned and slightly less are aware of the conflict in Syria (89%) and only (89%) are concerned.

- Two in five (43%) of Americans with a household income under \$50K consider these conflicts to be very or extremely important, compared to (60%) of those with an income of \$100K+.
- In our [2020 The Listening Project poll with The Milken Institute](#), we found that (66%) of Americans considered conflicts resulting in an increasing amount of displacement and refugees to be important. Since then, this number has decreased to only half (51%).

Implication:

Janti Soeripto, President of Save the Children, says media coverage may be a factor: "it was very difficult for us and for all other humanitarian agencies to find any attention for the current famine that is raging across 13 countries, putting 45 million people at risk – the largest number since the early '80s."

Section:

03

Topic:

THE AMERICAN CONSUMER – SPENDING HABITS ACROSS KEY INDUSTRIES: HARRIS BRAND PLATFORM

Introduction:

In [our recent report](#) using data from Harris Brand Platform, we explore consumer purchasing patterns across ten industries at the close of 2021, and predict what that means for 2022. Here's what we found:

- Younger consumers' (ages 18-34) transportation purchases were more heavily swayed by social media (20%) and TV ads (16%) than Boomers' (2% and 3%, respectively).
- Millennials (28%) reported most often that their household had spent on travel in the prior 30 days vs. (16%) of all Americans.
- When buying apparel, **women (20%) said more often than men (11%)** that their purchase decision was influenced by a **reduction in price**.
- **Younger consumers (19%)** are the most likely demographic to anticipate an **increase in personal wellness spending**, versus (5%) of Boomers.

- **Seventy-three percent of Americans' in-home** entertainment and content purchases were **made online** rather than in-store.

Implication:

Consumer spending habits are constantly evolving, and companies, brands, and retailers will need information to intelligently predict their customers' actions.

Section:

04

Topic:

PHARMA'S 'SUPERHERO' IMAGE FADES AS INFLATION, UKRAINE DROWN OUT THE INDUSTRY: FIERCE PHARMA-HARRIS POLL

Introduction:

The pharmaceutical industry's reputation was flying high during the first year of the pandemic, but according to our latest data [featured in Fierce Pharma](#) it's dropped off.

- Pharma's reputation is down (15%) from its peak in late 2020, with just under half (47%) having a positive opinion of the industry – down from (62%) in December 2020.

- **The Good News:** The industry's image ratings typically languished at around (30%) pre-pandemic. The industry still commands more respect – and potentially has more influence with the public – than it did when its reputation was in the doldrums.
- **Vaccine Effect:** Unvaccinated Americans are dragging down the industry's reputation, with (38%) having a positive opinion vs. (51%) of vaccinated Americans.
- **Generation Gap:** Over half (56%) of Millennials have a positive opinion of the pharmaceutical industry compared to only (42%) of Boomers and (45%) of Gen X.
- **Younger consumers (19%)** are the most likely demographic to anticipate an **increase in personal wellness spending**, versus (5%) of Boomers.

Implication:

The decline may not be an unforced error, but rather other events have moved into the forefront of Americans' minds. "I can say with 86% certainty, because that's the data we have seen, that those two things are inflation, and the war in Ukraine," says Rob Jekielek, managing director at The Harris Poll.

Section:

05

Topic:

AMERICANS WANT FINANCIAL ADVICE BUT ARE NOT SURE WHERE TO GET IT: INTELLIFLO-HARRIS POLL

Introduction:

Our recent survey with intelliflo, a cloud-based technology platform for financial advisors, and [featured in Yahoo! Finance](#) looks at Americans' attitudes and behaviors related to financial advice. Here's what we found:

- Three-fifths (59%) of Americans, including (71%) of Gen Z and (72%) of Millennials, say there are financial topics they want advice on but aren't sure how to get it.
- Only about one-third of Americans (32%) turn to registered financial advisors for financial advice, while more than half (52%) turn to family and (41%) turn to digital sources.
- The top barrier preventing Americans from seeking financial advice from a registered financial advisor when they want/need it is the belief that they don't think they have enough money to hire one (35%).

- Two-thirds of Americans (68%) say a **personalized financial plan based on their goals** would be an important factor if they were considering a financial advisor.

Implication:

"There is a significant need and desire for financial advice across the board, but many simply don't know how to access it. Technology can play a critical role in helping financial advisors to efficiently serve these consumers." said Jennifer Valdez, president of Americas, intelliflo.



WAVE 101

WAVE 101 INTRODUCTION

The following research was conducted between **March 18 - 20, 2022** by The Harris Poll. Fielded among a nationally representative sample of **1,998** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

PFIZER & MODERNA SEEK AUTHORIZATION FOR SECOND ROUND OF BOOSTERS

Introduction:

Pfizer and Moderna recently [filed for approval](#) for a fourth dose of the COVID-19 vaccine and the FDA [will meet soon to discuss](#) criteria and timing for these boosters. We checked in with Americans on how they feel about another dose. Here's what we found:

- Good News for Pfizer: (82%) of vaccinated Americans 65+ report being likely to receive a second booster shot if the FDA authorizes Pfizer's request.
- Among those boosted or planning to be, (88%) are likely to receive a second COVID-19 booster shot if it becomes recommended by medical professionals and health officials.
- **Vaccine brand loyalty decreases:** Back in December, (76%) of those with plans to receive a booster shot were going to stick with their initial vaccination brand. Now, of those who would receive a second booster shot, only (51%) are **likely to stick with their original booster vaccine brand if they get a second shot.**

- Among the (12%) unlikely to receive a second booster, half (51%) say it isn't necessary, (28%) say it's a ploy to make pharma companies more money, and (22%) say it's useless as the pandemic is or is about to be over.

Implication:

Given some public health experts are [warning of a coming COVID surge](#), a second booster could prove critical in protecting the most vulnerable Americans.

Section:

02

Topic:

AMERICANS CALL ON COMPANIES TO TAKE ACTION AGAINST RUSSIA

Introduction:

Russia's invasion of Ukraine is a concern for most Americans (83%) and consumers are looking for American companies to take financial action. Here's what we learned:

- Nearly half (45%) of Americans **have tried to help in some way**: (19%) have donated money, (10%) have supported local Ukrainian-owned businesses, and (9%) paid for food or Airbnb's in Ukraine..
- Three-quarters (74%) of Americans say **companies should stop doing business in Russia**. Older Americans are more likely than younger generations to want companies to exit (Gen X: 78%, Boomers: 87% v. Gen Z: 64%, Millennials: 58%).
- A majority (69%) of Americans - and (83%) of Boomers - would **refuse to support a company still operating in Russia** and would find an alternative company or product.
- **Americans are taking note** of companies that have removed or decreased their operations and investments in Russia, with (44%) recalling fast food companies, (33%) for streaming and media, (33%) for payments and financial services, (26%) for big tech, and (25%) for energy and oil.
- Among those familiar with Big Tech's response, (86%) agree **that social media should be taking action** in how their apps are being used in Ukraine and Russia.

- Grammarly is [continuing to pay its workers](#) who joined the Ukrainian army to fight Russia.

Implication:

Americans are watching how companies respond to the war on Ukraine and the opportunity for companies to take a stand against Russia will prove a critical moment in reputation management for many global companies.

Section:

03

Topic:

HOW TO BREAK THE CYCLE OF FEAR DRIVEN BY COVID AND WAR - AND PROTECT YOUR KID'S MENTAL HEALTH: APA HARRIS POLL STRESS IN AMERICA

Introduction:

Two years after the World Health Organization declared COVID-19 a pandemic, our data, in partnership with the American Psychological Association and [covered by USA Today](#), found that (63%) of Americans feel their lives have been forever changed. Here's what else we found:

- **It's not just the virus:** Top sources of stress were the rise in prices of everyday items due to inflation (87%), followed by supply chain issues (81%) and global uncertainty (81%).
- **Americans are emotionally overwhelmed:** (87%) agreed it feels like there has been a constant stream of crises over the last two years, and more than seven in 10 (73%) are overwhelmed by the number of crises facing the world right now.
- **Money and economic stress are mounting:** The proportion of Americans who noted money as a source of stress (65%) is up significantly from our surveys in June (61%) and February (57%) 2021.
- **Widespread grief and worry about children's development:** Almost half of those reported a big increase in sedentary behavior, which will be difficult to reverse, and a majority revealed significant unwanted weight changes. Drinking and substance abuse have been on the rise because of the stress of the pandemic and its restrictions.

Implication:

Compounding financial stressors for Americans that were already on the rise in the wake of the COVID-19 pandemic have been exacerbated by Russia's invasion of Ukraine.

Section:

04

Topic:

20 BRANDS GETTING GEN Z'S ATTENTION (AND DOLLARS): AD AGE-HARRIS POLL

Introduction:

The debut of our Gen Z Brand Tracker poll, [in partnership with Ad Age](#), found that targeted efforts by Lexus, Ocean Spray, Cinnamon Toast Crunch, and other companies are making gains with these coveted consumers

- **Context:** The poll ranks changes in brand equity – that is, how much this generation's perception and intent regarding these brands changes quarter to quarter.
- Lexus comes in on top with its **successful switch away** from TV advertising to TikTok **micro-influencer partnerships and e-sport sponsorships** targeted towards younger consumers.
- Ocean Spray soared to the second spot **after riding a wave of popularity** after an **organic viral hit on TikTok** depicting TikToker Nathan Apodaca skating to a Fleetwood Mac song and drinking the brand's juice.
- **Brands in the Metaverse:** Hyundai, which placed 17th in the poll, used the metaverse to let younger audiences take drives on Roblox.
- **Partnerships are key for Gen Z consumers:** Hyundai has partnered with South Korean boyband BTS and Cinnamon Toast Crunch with Olympic snowboarder Chloe Kim and NFL's Justin Jefferson.

How Does Your Brand Compare?

Brand positioning impacts brand equity and consumer loyalty. Learn how Harris Brand Platform reveals real-time insights to keep you informed.

[Learn More](#)



Implication:

According to Harris Poll CEO Will Johnson, this increased familiarity and brand equity with Gen Z comes as brands “continue to invest in partnerships, channels, and activities closer aligned to (this generation's) experience.”

Section:

05

Topic:

DOVE CASE STUDY: THE POWER OF BRAND PARTNERSHIPS

Introduction:

Using Harris Brand Platform, we evaluated the impact of beauty brand [Dove's advertising partnership](#) with TikTok. In this case study, we see how the partnership helps Dove increase brand usage among younger consumers and allows TikTok to strengthen its reputation.

- As part of its Self-Esteem Project, Dove launched a #NoDigitalDistortions campaign on TikTok in Spring 2021 to encourage body acceptance by asking TikTok users to post without digitally altering their images.
- Examining Millennial and Gen Z consumer data, we see a **significant lift in familiarity with Dove (+6.2)** post-campaign and a **(+1.2) lift in purchase consideration**.
- The greatest growth was in Dove's sales conversion funnel: post-campaign, brand trial (+5.8), usage (+9.0), and recommend (+3.9) among Millennial and Gen Z significantly increased.
- TikTok also benefited from the partnership, tying their brand with Dove's message of body acceptance at a time when social media has been criticized for undermining users' self-confidence and sparking body dysmorphia.

Implication:

Dove's case study shows how brands can benefit from strategic partnerships that can strengthen each participant's brand by building off the positive reputation and qualities of the other.



WAVE 100

WAVE 100 INTRODUCTION

The following research was conducted between **March 11 - 13, 2022** by The Harris Poll. Fielded among a nationally representative sample of **2,000** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

1. AFTER TWO LONG YEARS, COVID-19 IS NO LONGER #1 CONCERN FOR AMERICANS

Introduction:

For what is likely the first time in two years, COVID-19 is no longer the primary concern among Americans, as the economy, inflation, and jobs (90%) and Russia's invasion of Ukraine (87%) are a higher concern than the virus (68%). Here what they are thinking:

- Today, Americans find **many daily activities not too, or not at all, risky anymore**, such as eating or drinking inside a restaurant/bar (48%), working in-person without a mask (43%), shopping indoors with a mask (41%), and exercising maskless in a gym or a sports team (38%).
- **Replacing COVID in the news:** (87%) of Americans consider **Russia's invasion of Ukraine as the biggest news story in America right now**, surpassing the COVID-19 news coverage of the past two years (v. COVID-19 being the biggest story: 13%).

- **Taking a mental break from COVID because, well, there could be another pandemic before we die:** (69%) of Americans think it is likely that they will live through another pandemic in their lifetime (Gen Z: 56%, Millennial: 73%, Gen X: 78%, Boomer: 62%) and (27%) believe that **COVID-19 news will dominate the news cycle again** and (58%) could see it occur if something major happens such as a new, deadly variant arises.

Implication:

After a roller-coaster of emotion, Americans have reached similar levels of pre-Delta optimism that the worst of COVID-19 is behind us (64%), however, diminishing news coverage and COVID-19 fatigue may prove concerning as European COVID-19 cases have begun rising again—[such as in the UK](#) two weeks after dropping mitigation measures.

- Almost 3 in 4 TFM members (74%), say their communities cultivate their own joy, despite what the world puts them through, while 4 in 10 (43%) say brands can increase their joy in life by "giving women of color recognition where it is

Section:

02

Topic:

YOUNGER CONSUMERS LEAD THE WAY IN SHOPPING FOR INTERNATIONAL BRANDS: RETAIL BREW-HARRIS POLL

Introduction:

COVID-19 might have stymied international travel for the past two years, but young shoppers have found another way to bring the world to them according to our latest survey [in partnership with Retail Brew](#).

- Nearly three-quarters (74%) of Gen Z and (71%) of Millennials bought from an international retail brand such as Zara, Shein, and Louis Vuitton in the last year.
- Those figures drop to (17%) and (13%) for Gen X and Boomers, respectively.

- Younger generations are **seeking brands beyond U.S. borders** with a purpose: (29%) of both Gen Z and Millennials said they intentionally shopped with an international brand at least once a month.
- **What are they buying?** The most popular categories across all US consumers were fast-fashion apparel (45%), electronics (41%), and personal care (41%).
- Consumers are shopping around as among those who've bought from an international brand in the last year: (36%) did so at a department store; (36%) from an online marketplace; (30%) from a brand's website; and (25%) from a brand's store.
 - Close to a quarter (23%) of Gen Zers and (34%) of Millennials even shopped on a social media platform.

Implication:

The inroads international brands have made with younger consumers should bode well for them in the future as Gen Z's income is [predicted](#) to reach \$33 trillion by the end of the decade - and overtake millennials a year later.

Section:

03

Topic:

MORE ROAD TRIPS ON TAP FOR U.S. CONSUMERS: OAAA-HARRIS POLL

Introduction:

A majority of U.S. adults (85%) are expecting to travel this summer and driving in personal vehicles is the leading choice for getting to summer vacation destinations according to our data in partnership with OAAA and [covered by MediaPost](#) and [DailyDOOH](#).

- Nearly half (48%) of Americans who plan to vacation this summer **will take two weeks or more**, up from (41%) last summer.
- Americans are becoming **increasingly comfortable traveling by all modes of transportation**, especially city dwellers and millennials, according to the study.
- (69%) feel **safe flying**—up from (59%) last April—while (67%) feel the same about **trains**. In addition, nearly two-thirds of U.S. adults feel **comfortable using ride shares and taxis** (62%, 61%), both up significantly from April 2021.
- In **anticipation of hitting the road**—whether for summer travel or commuting—half of Gen Z, Millennials, men, and big city dwellers **recall seeing recent OOH ads** for auto brands or dealerships.

- Over two in five (43%) who recall these OOH messages say that the experience prompted them **to actively engage with the ad**, whether visiting the brand/dealer's website (38%), researching the advertised brand/dealer (38%), sharing information with friends or family (30%), visiting the brand/dealer's showroom (23%), and more.

Implication:

According to Harris Poll CEO John Gerzema, “these findings confirm the good news that Americans are ready to get out and about - whether they are on-the-road, on public transit or flying - all modes of transportation will be seeing an uptick and OOH is an excellent way to gain mindshare and drive action.”

Section:

04

Topic:

DIVING INTO MOTIVATIONS BEHIND THE METAVERSE

Introduction:

According to our latest report, [A Marketer's Guide to the Metaverse Consumer](#), people under 30 are **generally optimistic** about the metaverse with (53%) agree that the platform “**would make their lives better.**”

- Two-thirds (66%) think the metaverse will soon be **as popular as traditional social media platforms** and (64%) agree that they could see themselves using the metaverse as a **place to socialize**.
- Consumers are ready for brands to enter the metaverse as (79%) would be **excited if their favorite brands** would be in the metaverse/Web 3.0, with (38%) being very excited.
- Four in 10 (43%) want digital twins - ways for **brands to link the virtual world with the 'real' world** such as owning shoes you and your avatar can both wear - and one third (33%) want **access to exclusive** metaverse brand experiences (men: 42%, women: 23%).
- Men are the early adopters of metaverse interest: More interested in cryptocurrencies (63% v. women: 40%), NFTs (61% v. women: 55%), entertainment experiences via AR/VR (66% v. women: 51%), and metaverse shopping (58% v. women: 49%).

Implication:

Consumers are open to brands trying new things in this environment and the risk to brands as they experiment in the metaverse is low as only (15%) of individuals say that brands entering the metaverse would negatively impact their perceptions.

Section:

05

Topic:

HEALTH & PERSONAL CARE: AN INDUSTRY SNAPSHOT

Introduction:

Our [recent report](#) on the state of the wellness industry explores consumer sentiment towards personal biometric devices (health trackers) and eco-friendly personal care products. We also rank the leading personal care brands by equity and purchase consideration. Here's what we found:

- Consumers are notably more influenced by a **product's price (91%)** than by "green factors" such as **natural ingredients (71%)** when considering purchase.
- Young consumers (ages 18-34) are more likely to say green factors such as **eco-friendly give back initiatives (70%)** influence their purchase decisions.
- Over half (**52%**) of **adult consumers** believe people make healthier choices when they have **access to personal health data**, such as the data collected by health trackers.
- Younger consumers more often report **currently using a health tracker (43%)** than middle aged (35-44) (39%) or late-middle-aged (45-54) consumers (28%).
- Late-middle-aged users more often report interest in **tracking physical activity (54%)**, while younger consumers more often report interest in **tracking mental status (36%)**.
- **Dove** topped the list of personal care brands, with a **brand equity score of 67.7%**.

Implication:

Americans' health and personal care needs evolve as they age. Brands must remain aware of each demographic's unique purchasing influencers to produce and market products that resonate with each consumer group.



WAVE 99

WAVE 99 INTRODUCTION

The following research was conducted between **March 4 - 6, 2022** by The Harris Poll. Fielded among a nationally representative sample of **2,023** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

1. THE HEALTH WORKER SHORTAGE IS STARTING TO GET REAL FOR AMERICANS: THE CVS HEALTH-HARRIS POLL NATIONAL HEALTH PROJECT

Introduction:

More than half of Americans (51%) say they've directly felt the effects of healthcare worker shortages, from canceled appointments to delayed surgeries, according to "The CVS Health-Harris Poll National Health Project" and [covered in Axios](#).

- Of those impacted by shortages, (45%) said they had **trouble scheduling appointments**, more than 1 in 3 said their **doctor was operating on reduced hours**, a quarter **had treatments or surgeries delayed**, 1 in 5 said their **doctor had stopped practicing**, and (13%) said their **health care facilities were closing** completely.
- This comes as more than (40%) said they are reconnecting with the health system and reassessing their care after pandemic lockdowns and restrictions.
- For instance, (47%) said they were trying to stay more physically active, (43%) said they were prioritizing their health habits and goals more than before the pandemic, and (35%) said they were buying more products to protect their health.
- This was **particularly true for BIPOC Americans**. A third of Black Americans (33%) and a quarter of Hispanic Americans (24%) said they **were visiting the doctor more** - but more than half in both racial groups said they **are stressed about accessing quality healthcare** versus (43%) of the general population.
- This was **particularly true for BIPOC Americans**. A third of Black Americans (33%) and a quarter of Hispanic Americans (24%) said they **were visiting the doctor more** - but more than half in both racial groups said they **are stressed about accessing quality healthcare** versus (43%) of the general population.

Implication:

It's "not only a problem that's been sort of hidden, but it's also causing significant sources of pain and frustration with people who really need these services," says John Gerzema, CEO of The Harris Poll. "This isn't your typical consumer good. This is people's health."

Section:

02

Topic:

SURVEY SAYS, CRYPTO ATTITUDES ARE CHANGING: PROTOCOL- HARRIS POLL

Introduction:

The adoption of digital currencies like Bitcoin and Ether has grown astronomically, but many consumers are still wary about crypto according to our latest survey in [partnership with Protocol](#).

- Of the (28%) of people who currently trade crypto, an overwhelming (93%) said they **would trade or buy more this year**, and (94%) said they would do more next year.
- Crypto isn't blue skies for everyone: about (74%) of people who said they were aware of cryptocurrencies view it as a risky investment.
- What's surprising is that the percentage is **even higher for those who currently and previously trade crypto**, which means that crypto traders are doing it despite – or because of – its volatility.
- **A word of warning:** Crypto users seem to **value security over decentralization** as the most-used crypto exchanges are Crypto.com, Coinbase and Robinhood – all centralized exchanges where crypto is held in a hosted wallet or online account.

Implication:

Brent Johnson, CISO at Bluefin Payment Systems, told Protocol that this “demonstrates consumers are becoming more comfortable with concepts such as converting crypto to fiat and receiving crypto rewards.”

Section:

03

Topic:

MOST CONSUMERS WORRY THE METAVERSE MAY LEAD THEM TO LOSE TOUCH WITH REALITY: ADAGE-HARRIS POLL

Introduction:

Over half of Americans fear that the metaverse will lead them to neglect reality, and therefore prefer activations that include real-world components, such as AR/VR, according to our last survey [with AdAge](#).

- Most (86%) Americans are familiar with cryptocurrency, the metaverse (65%), and NFTs (61%), but only (10%) with Web3 – a new iteration of the internet based on blockchain.
- More than half (52%) of those ages 18 to 54 familiar with the metaverse fear that the space and its technologies **will lead to the neglect of their physical surroundings**.
- This cohort particularly fears that they could **lose pre-existing relationships and the ability to form new ones**.

- Most (80%) of these consumers are interested in AR/VR tech - a sizable advantage over interest in NFTs (57%) and cryptocurrency (51%).
- Over half of these respondents cited interest in using AR/VR for physical shopping, as compared to shopping for virtual wearables that can be worn in metaverse platforms.
- Despite this hesitancy, brands are increasingly [buying up land in these worlds](#) to house and activate such assets.

Implication:

Tech companies will need to be aware of what consumers are really interested in regarding the metaverse as interest in technologies that bridge the digital and physical realm far outweighs that in more abstract, digital-only formats, such as NFTs and cryptocurrency.

Section:

04

Topic:

FERTILITY BENEFITS HAVE BECOME A MAJOR WEAPON IN THE WAR FOR TALENT: FORTUNE-HARRIS POLL

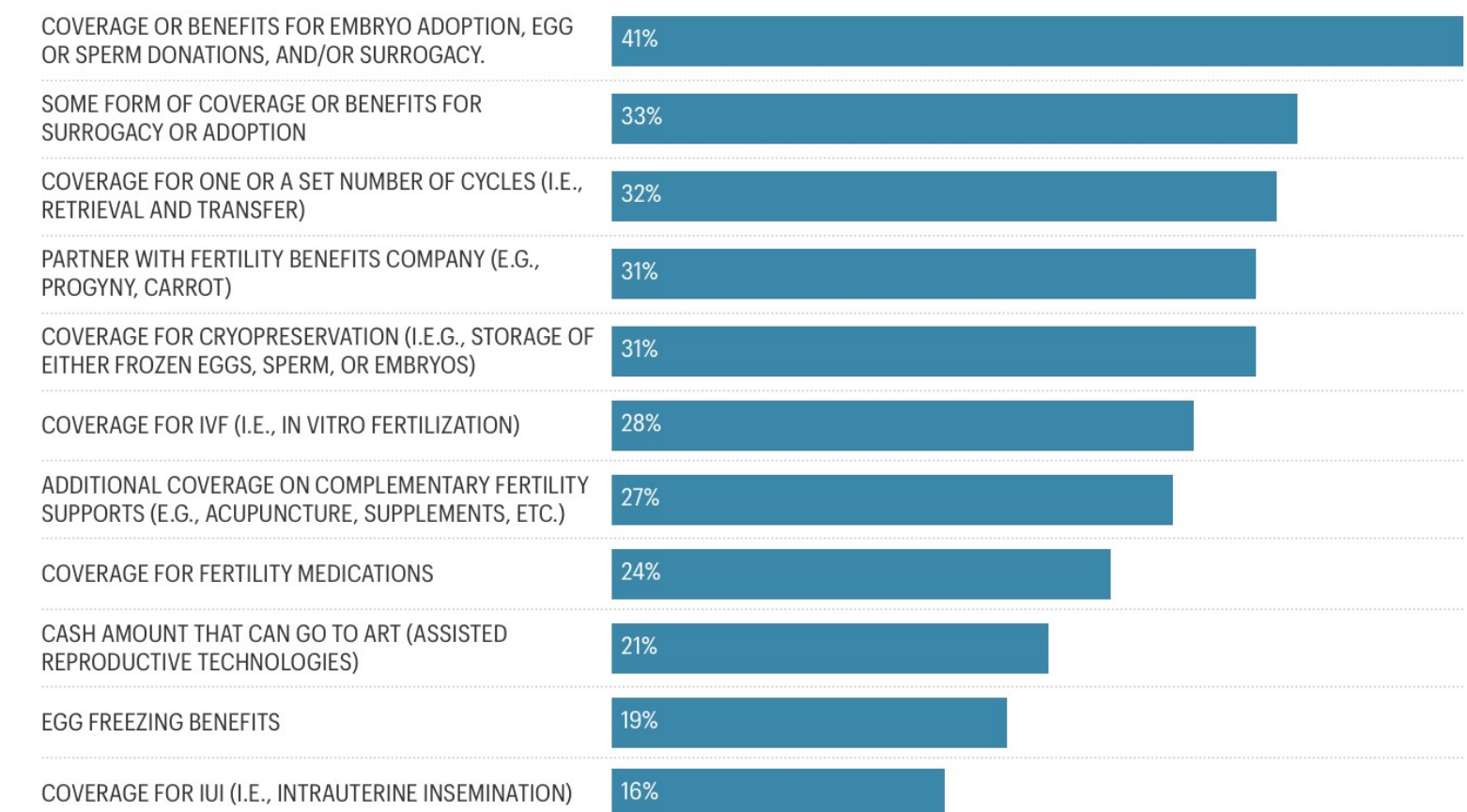
Introduction:

During the ongoing war for talent, more and more companies are beefing up their employee benefits programs in an effort to attract the best workers. And fertility benefits are quickly gaining ground as a must-have according to our latest survey in [partnership with Fortune](#).

- Nearly half of workers (45%) say fertility benefits are an important component when considering a new job.
- Among those looking for fertility benefits, workers say coverage for adoption, fertility medications, and IVF treatments are the most important offerings.
- Yet only (6%) of workers surveyed reported having access to some type of fertility benefit - and the benefits vary greatly among employers:

What fertility benefits companies are offering

Here's the benefits that workers say are available from employers who offer some type of fertility benefit.



DATA BASED ON SURVEY OF 2,019 U.S. ADULTS FIELDED FEBRUARY 11-13, 2022

SOURCE: [THE HARRIS POLL](#)

FORTUNE

Implication:

In the midst of The Great Resignation, employers should consider expanding rare benefits like fertility coverage to retain and attract talent, along with other forms of family building such as paid parental leave after a birth or adoption.

Section:

05

Topic:

AUTOMOTIVE AND TRANSPORTATION: AN INDUSTRY SNAPSHOT

Introduction:

Our [recent report](#) on the state of the automotive industry explores consumer sentiment towards electric vehicle production and autonomous vehicles as well as evaluating automotive and transportation brands, ranking the leaders by brand equity and growth. Here's what we found:

- Of Americans planning to purchase a vehicle in the next year, 69% are concerned about the environmental impact of manufacturing EVs.
- Most consumers (78%) think car makers should take steps **to limit the environmental impact of EV production.**
- More than half (67%) of adults planning to purchase a vehicle think **autonomous vehicles will be safer than traditional vehicles** in the next 10 years.
- While nearly half (47%) of men feel safe sharing the road with self-driving cars, only just over one-third (36%) of women agree.
- **UPS** topped the list of transportation brands, with a **brand equity score of 67.9%.**
- **Shipt** saw the **greatest growth in brand equity with 1.9%** growth from Q3 to Q4, 2021

Implication:

As the transportation industry incorporates new technologies, manufacturers must remain aware of evolving consumer sentiment to address concerns and develop effective messaging.



WAVE 98

WAVE 98 INTRODUCTION

The following research was conducted between **February 25 - 27, 2022** by The Harris Poll. Fielded among a nationally representative sample of **2,043** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

“THE FUTURE MAJORITY” AND HOW IT WILL RESHAPE BRAND LOYALTY

Introduction:

In partnership with Dotdash Meredith and Omnicom Media Group, we [take an in-depth look](#) at the women who will reshape the future of brand expectations and loyalty. Defined in the study as “The Future Majority” (TFM), this group is comprised of Black, Latina, AAPI women, and LGBTQIA individuals 40 and under.

- **Brands are not connecting with this growing consumer segment:** (75%) agree “I can’t name more than 5 brands that I have a deep or intimate relationship with (i.e., brand that ‘gets me’).”
- **The future of loyalty is being defined by TFM:** Almost 9 in 10 (87%) say they will make it a priority to “take time to research brands, including their values and how they support communities I care about.”
- **Influence without recognition:** TFM members know their communities deeply influence American culture, but feel unacknowledged (67%) and want to see them get more credit (74%).
- Almost 3 in 4 TFM members (74%), say their communities cultivate their own joy, despite what the world puts them through, while 4 in 10 (43%) say brands can increase their joy in life by “giving women of color recognition where it is due.”

Implication:

“Brands should consider creating a TFM strategy that is centered around deep understanding, long-term commitments, transparent business practices, and a celebration of the joy and excellence that already exists in TFM communities,” said Libby Rodney, Chief Strategy Officer of The Harris Poll.

Section:

02

Topic:

UNSAFE. UNHEARD. UNVALUED. A STATE OF EQUITY: HUE-HARRIS POLL

Introduction:

Our [annual "A State of Inequity" report](#) in partnership with Hue, and [covered by Protocol](#), reveals that many workers report similar levels of workplace struggles and attitudes toward work compared to last year - and it is clear companies, organizations, and HR professionals have yet to meet the demands of employees of color.

- Four in 10 (40%) of underrepresented employees responded that **they've experienced discrimination at work** in comparison to (12%) of white workers.
- Similar to last year, less than a quarter of employed Americans report their current or most recent employer invested in any diversity recruiting-related initiatives over the past six months.
- A majority (70%) of all employees agree that **seeing others who look like them or are from the same racial/ethnic background** in the workplace motivates them (up from 61% last year).
- Yet, just over a quarter of all U.S. employees report that their **company has more People of Color** (29%) or **more women** (27%) than it did one year ago.
- **Company Culture:** A quarter of all employees of color that started a job in the last 12 months report that they left their most recent employer after less than a year compared to only (18%) of white professionals.

- Such exits were most common among Hispanic professionals (41%), multiracial professionals (35%), and female employees of color (28%) who had started a new job in the last 12 months.

Implication:

Companies still have a long way to go in providing DE&I resources to their employees. One year later, there is still no common DE&I resource that most American employees say their company has.

Section:

03

Topic:

THE WORKER SHORTAGE IS PUSHING COMPANIES TO OFFER BETTER BENEFITS: FORTUNE-HARRIS POLL

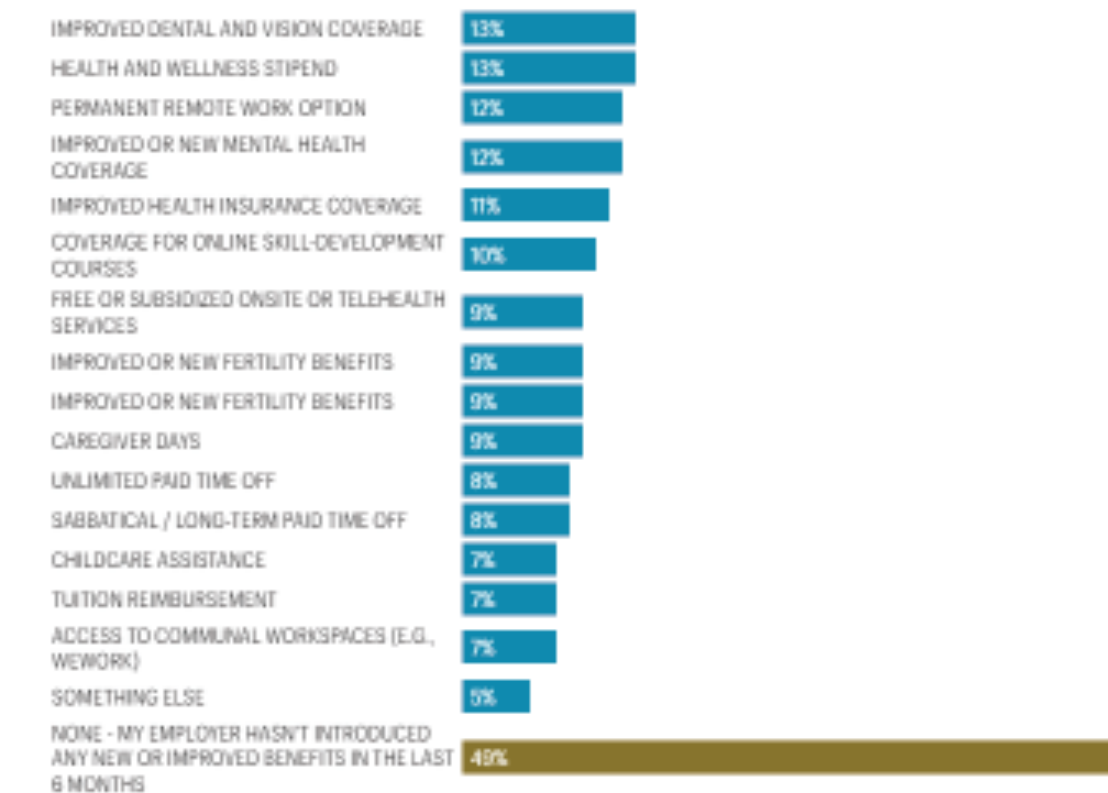
Introduction:

Employers have had their backs up against a wall for months as turnover continues to roil the workforce. Businesses have been forced to throw money at the problem in the form of higher wages and better benefits, according to our [latest survey with Fortune](#). Here's what we found:

- Half (51%) of employees reported receiving new or increased benefits over the last six months from their employers.
- Improved **dental and vision benefits**, for example, were among the most commonly reported benefit expansions, along with **added health and wellness stipends**, and provided **options for permanent remote work**.

Benefits employers have added or expanded

Which of the following benefits has your employer introduced within the last 6 months? Please select all that apply.



DATA BASED ON SURVEY OF 2,019 U.S. ADULTS FIELDED FEBRUARY 11-13, 2022

SOURCE: [THE HARRIS POLL](#)

FORTUNE

- However, over three-quarters (77%) of workers say they would **take higher pay** over access to unconventional benefits (23%) such as health & wellness stipends, sabbaticals, and unlimited PTO.
- **For job seekers, flexibility is key:** a flexible schedule (42%), unlimited PTO (36%), and ability to work remotely (28%) are some of the top benefits that would lead workers to seek a job elsewhere.

Implication:

It may cost money to increase benefits for workers, but it could cost a lot more - time, money, productivity - to lose those employees to other companies offering more enticing compensation.

Section:

04

Topic:

TOYOTA CASE STUDY: FINDING SUCCESS AMONGST SHORTAGE

Introduction:

Using data from Harris Brand Platform, we evaluated how [Toyota's forward-thinking inventory management](#) strategy helped them support 2021 production levels, and increase consumer brand sentiment, during the supply chain disruptions and semiconductor chip shortage.

- After a 2011 earthquake in Japan disrupted production, Toyota revamped its inventory management system, stockpiling semiconductor chips. The brand's chip surplus allowed their 2021 production levels to remain more stable than many of their competitors.
- For the first time, Toyota's U.S. vehicle sales (2.3 million) outpaced GM's (2.2 million) by the end of 2021.
- All measurements of Toyota's brand equity rose from Q1 to Q4, 2021. Most significantly, the brand saw a +2.8 increase in purchase consideration.
- Toyota saw growth across their sales conversion funnel. Notably, consumers were more likely to use (+4.2) and recommend (+4.2) Toyota to others.

Implication:

Toyota's case study highlights how brands benefit from a strategy that proactively combats unforeseen disruptions. Having the right tools in place to navigate issues when they inevitably arise can greatly contribute to the brand's reputation and ongoing success.

Section:

05

Topic:

ULTRA-WEALTHY'S NEXT GENERATION FOCUSING ON SOCIALY RESPONSIBLE INVESTING: BNY MELLON WEALTH MANAGEMENT- HARRIS POLL

Introduction:

According to our latest survey with BNY Mellon Wealth Management and [covered by Bloomberg](#), the private bankers managing the finances of the world's ultra-wealthy expect the next generation will prioritize socially responsible investing -- even if it comes at the expense of returns as.

- **Context:** Family offices are typically discreet firms that manage their fortunes, tax affairs and even lifestyles of the wealthy, with the largest overseeing billions of dollars for multi-generational dynasties.

- Among the 200 decision-makers in family offices managing at least \$150 million served, they theorize there might yet be a generation shift in **how the wealth of the ultra-rich is managed**.
- About three out of four family offices predict its future leaders will be **more focused on environmental, social and corporate governance criteria**, and (86%) say the next generation will more likely invest in **decentralized finance and cryptocurrencies**.
- Three out of four reported either investing in or exploring their options around digital currencies.
- Of the (20%) that are already trading crypto, a majority plan to increase their holdings.

Implication:

Even investment firms are struggling with U.S. staffing shortages as (60%) of those surveyed said it's been a challenge to recruit well-qualified executives, with (70%) saying they'd pay an above-market rate to get the right hire.



WAVE 97

WAVE 97 INTRODUCTION

The following research was conducted between **February 18 - 20, 2022** by The Harris Poll. Fielded among a nationally representative sample of **2,033** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

AMERICA'S RAPID - YET UNEQUAL - PANDEMIC OFF- RAMP: AXIOS- HARRIS POLL

Introduction:

America is accelerating toward a return to pre-pandemic life, though millions of people aren't yet comfortable abandoning pandemic precautions - or they feel downright threatened by the rapid reversal according to [our latest survey with Axios](#).

- **Driving the news:** Businesses and policymakers across the country are removing mask and vaccine mandates, loosening COVID protocols and encouraging more in-person interaction.
- However, just over half (55%) said they **agreed that it's the right time** for states to begin lifting their indoor mask mandates, with Republicans much more likely to agree than Democrats.
- **Plenty will be masking anyways:** Three-quarters said they'll keep their masks on if the public majority voluntarily does, and 70% said they'll wear a mask if they don't know whether the people around them are vaccinated.
- Continued masking may be in part to 71% of Americans that believe that COVID-19 is now a part of daily life and will last in some form (v. 29% remaining hopeful it will become eradicated).

Implication:

Employers are also dropping mask mandates and, in some cases, setting return-to-work dates, [AP reports](#). However, based on other Harris surveys, companies [will need to follow best practices](#) and understand who does - and does not - want to be back in the office full time.

Section:

02

Topic:

THE UNEQUAL RETURN TO THE OFFICE: AXIOS- HARRIS POLL

Introduction:

In [our latest survey with Axios](#), we found that women and People of Color are generally happier working from home and are likelier than their white male colleagues to want to continue working remotely.

- Just over half (52%) of women say they enjoy working remotely and would like to do so in the long term, compared with 41% of men.
- Only 15% of women say working in person allows for more camaraderie among colleagues, compared with one-quarter (25%) of men.
- Over half (52%) of Black workers and 50% of women say working from home is better than working in the office **when it comes to advancing in their careers**, compared with 42% of men.
- Three-fifths (63%) of Black workers and 58% of women say they **feel more ambitious when working from home versus the office**. Just 46% of men feel the same way.
- And when asked about their anxieties over returning to offices, 47% of women of color say they **worry about having to dress for work**, compared with 31% of men.

Implication:

"It's output over office politics," says John Gerzema, CEO of the Harris Poll. "It's the theater of the office that is often alienating women workers, workers of color, women of color...and I think what you're seeing from this data is that COVID, perhaps accidentally, has very much liberated workers, particularly women and BIPOC workers."

Section:

03

Topic:

ANTI-UNION STANCES CAN AFFECT BRAND SENTIMENT: MORNING BREW-HARRIS POLL

Introduction:

Across industries and job titles, many workers around the U.S. – a [Starbucks store](#), an [REI store in Manhattan](#), tech workers at [The New York Times](#) – have been coming together to fight for better working conditions. And they may have the public on their side according to our latest data [in partnership with Morning Brew](#).

- Seven in 10 (71%) Americans believe that more service-industry companies should have employee unions.
- That belief has the **potential to impact purchasing behavior**, as 42% reported being **less likely to shop** with a company that is trying to **stop its employees from unionizing**, and 41% said the same of a company with a **union on strike**.
- And those numbers are even higher among Gen Z.
- Beyond that, (29%) of Americans would be more likely to purchase from a brand with unionized employees, including (41%) of Millennials and (32%) of Gen Z.

Implication:

“We’re seeing an overall move in power, a shift in power from the C-suite to the E-suite, the employee suite,” according to Linda Ong, founder and CEO of Cultique. “People recognize that worker rights are important because everybody is reassessing the role of work in their lives anyway.”

Section:

04

Topic:

PANDEMIC WORSENING AMERICANS' ALREADY TERRIBLE SLEEP: HEALTHDAY- HARRIS POLL

Introduction:

Many Americans are bone-weary following two straight years of pandemic stress, and our latest data in partnership with HealthDay and [as covered by U.S. News](#) shows that sleeplessness is only part of the problem. Here's what else we found:

- One-third of Americans **feel more tired now** than they did before March 2020, the start of the COVID-19 pandemic.
- But just 28% say they're getting less sleep than before the pandemic.
- About 60% agree that they often **feel mentally tired** even when they haven't been physically active.
- A similar number (57%) say they can't sleep well because they have too much on their minds, while about half (49%) say they are often too anxious to sleep well.

- This weariness is probably driven by pandemic-related changes causing a **lack of separation between work and home life that can be fatiguing**, according to Michelle Drerup, director of the Cleveland Clinic's Behavioral Sleep Medicine Program.

Implication:

"There's a gap there that basically says tiredness is not just driven by sleep," said Kathy Steinberg, vice president at The Harris Poll, with our poll pointing to deeper anxieties and stresses in the American psyche that are causing fatigue and harming sleep.

Section:

05

Topic:

BRAND BOWL 2022: SECOND ANNUAL INDEX ON THE BIG GAME'S AD IMPACT

Introduction:

Using Harris Brand Platform data, our [second annual Brand Bowl report](#) measured the impact of Super Bowl commercials on advertisers' brand equity scores. Here's what we found:

- **WeatherTech, Disney+, and General Motors** saw the **greatest lifts in overall brand equity** after the Big Game.
- **Thirty brands made their Super Bowl debut.** Notable wins include: Wallbox (+4.4 purchase consideration), Irish Spring (+6.0 perceived quality), Bud Light Seltzer Hard Soda (+10.1 brand familiarity).
- Super Bowl LVI ads were full of cryptocurrency platforms, electric vehicles, and sportsbook brands, resulting in mixed consumer reactions.
- Our **Ad Recall Tracker** ranked the top 16 brands with the highest ad recall rates. **Amazon Alexa** (39.6%) and **Avocados from Mexico** (39.0%) led the pack.
- This year's viewers saw a **higher percentage of comedic ads** (63%), and a **lower percentage of heartfelt ads** (13%) than in the prior two Super Bowls.

Implication:

As the most watched televised event of the year, Super Bowl advertisers stand to greatly increase their brand awareness and equity. However, brand tactics must align with changing consumer tastes to make a positive impact on advertisers' biggest night.



WAVE 96

WAVE 96 INTRODUCTION

The following research was conducted between **February 11 - 13, 2022** by The Harris Poll. Fielded among a nationally representative sample of **2,019** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

THE NEXT CULTURE WAR - TODDLER VACCINES: AXIOS-HARRIS POLL

Introduction:

Pfizer and federal officials are scrambling to speed up COVID vaccines for kids under 5. But our latest [poll with Axios](#) indicates plenty of parents may be on the fence about getting their child vaccinated right away. Here's what we learned:

- Of parents with children under 5, 60% are likely to have their young children vaccinated, with men being more likely compared to women (69% vs. 53%).
- Almost half of the suburban respondents (49%) said they were unlikely to want the shot for their kids - almost as high as people from rural areas (57% vs. urban: 25%).
- **But it will depend on parents' vaccination status:** 73% of vaccinated parents are likely to, while only 35% of unvaccinated parents are likely to vaccinate their children under 5.
- "When I looked at these numbers, I thought: 'Buckle up, PTAs. **Toddler vaccines are the next culture war**,'" says John Gerzema, CEO of The Harris Poll.
- Context: The push to vaccinate young children comes as even Democratic governors have [announced plans to stop masking kids in schools](#).

Implication:

If and when Pfizer's vaccines become available for the youngest kids, officials will have a job ahead of them convincing many parents to take advantage, even after two years of waiting.

Section:

02

Topic:

COVID HAS 'WIDENED THE CHASM' ON HEALTH DISPARITIES: TEVA- MOREHOUSE- HARRIS POLL

Introduction:

The global pandemic has worsened health inequities, and our latest survey with Teva Pharmaceuticals and Morehouse School of Medicine [covered by FiercePharma](#) shows just how much work the industry and others have left to do.

- When it came to the impact of COVID itself, **the differences were striking**: 42% of People of Color (POC) said someone in their household had the virus (v. white: 18%).
- Hispanics are being hit hardest, with twice as many as whites saying that a close friend, family member or loved one had died from COVID (41% versus 21%, respectively).
- One-third (34%) of POC said they found it **difficult to access a good-quality doctor or hospital** and 20% said they faced difficulty **accessing their prescription medications** (v. white: 19%, 20%).

- Half of all consumers said they'd **postponed or canceled health appointments during COVID**, but POC were more likely to do so than whites (64% v. 53%, respectively).

- The most common reason for the missed appointments was **fear of catching COVID**, but others, particularly Hispanics, said they **couldn't miss work or didn't have child care or transportation**.

Implication:

"The survey results are clear: COVID has widened the chasm," Morehouse School of Medicine President and CEO Valerie Montgomery Rice, M.D., said in a press release, adding that the results should "further our resolve to address and eliminate" the disparities.

Section:

03

Topic:

COMPANIES REPORT SUPPLY CHAIN ISSUES HINDERING GROWTH & FORCING LOWER HIRING STANDARDS: EXPRESS EMPLOYMENT PROFESSIONALS- HARRIS POLL

Introduction:

Demand for goods due to the holidays has passed, but businesses still say they are caught in a vicious cycle hindering growth and hiring fueled by supply chain failures according to our latest survey with Express Employment Professionals and [covered in Yahoo! Finance](#).

- Most investors (69%) say it's **important to invest in a socially responsible way**. Of that group, 45% say it's most important to choose investments that focus on **environmental and social impacts** (29%) and **governance impacts** (14%).
- More than two-thirds of investors (69%) say it's important to invest in a socially responsible way, yet, **fewer than 1 in 4 investors** (23%) say most or all of the money they currently have in investments **is invested in accordance with their values**.
- **The reason for the disconnect?** 68% of investors say they don't know the best way to invest according to their values, and 53% say it's difficult to find investments that align with their values.
- For the one-third of investors (31%) who say it isn't important to them to invest in a socially responsible way, the top reason is because they **want their investments to have the highest returns** regardless of whether or not they're socially responsible (41%).

Implication:

According to NerdWallet's Alana Benson, "There is a lot of evidence to suggest that ESG investments can not only have similar performance to their traditional peers, but they can sometimes outperform them."

Section:

04

Topic:

JUST 23% OF INVESTORS ALIGN MOST INVESTMENTS TO THEIR VALUES: NERDWALLET-HARRIS POLL

Introduction:

Socially responsible investing is gaining in popularity, but there's a gap between those who value it and those who actually invest this way according to our latest survey with NerdWallet and [featured in Nasdaq](#).

- Most investors (69%) say it's **important to invest in a socially responsible way**. Of that group, 45% say it's most important to choose investments that focus on **environmental and social impacts** (29%) and **governance impacts** (14%).

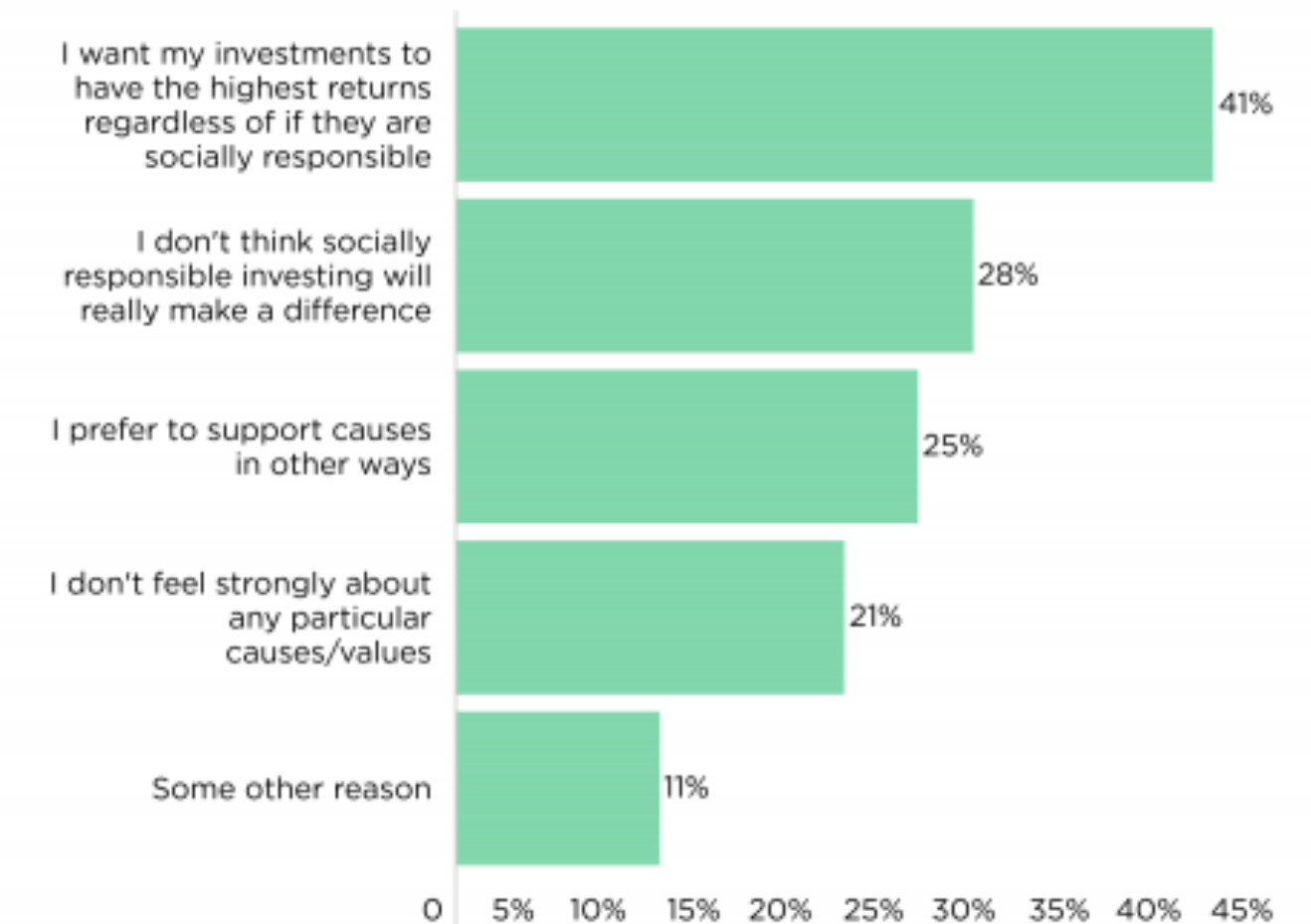
- More than two-thirds of investors (69%) say it's important to invest in a socially responsible way, yet, **fewer than 1 in 4 investors** (23%) say most or all of the money they currently have in investments **is invested in accordance with their values**.

- **The reason for the disconnect?** 68% of investors say they don't know the best way to invest according to their values, and 53% say it's difficult to find investments that align with their values.

- For the one-third of investors (31%) who say it isn't important to them to invest in a socially responsible way, the top reason is because they **want their investments to have the highest returns** regardless of whether or not they're socially responsible (41%).

Why some investors don't think socially responsible investing is important

Investors who say it's not important to them to invest in a socially responsible way give these reasons:



Source: NerdWallet survey conducted online Dec. 13-15, 2021, by The Harris Poll. Respondents include 502 investors who say it's not important to invest in a socially responsible way; they could choose more than one answer.



Implication:

According to NerdWallet's Alana Benson, "There is a lot of evidence to suggest that ESG investments can not only have similar performance to their traditional peers, but they can sometimes outperform them."

Section:

05

Topic:

AMERICANS WOULD CONSIDER SWITCHING HEALTHCARE PROVIDERS FOR MORE “APPEALING” SERVICES: TEGRIA- HARRIS POLL

Introduction:

Americans might say they are pleased with their current healthcare provider, but our new survey in partnership with Tegria and [covered by Yahoo! Finance](#) reveals that nearly 7 in 10 Americans (69%) would consider switching to another provider that offers more appealing services.

- **What could inspire people to switch?** Availability of same-day appointments for non-routine issues (35%), convenient locations where they already go (30%), and self-scheduling (29%).

- More than 4 in 5 (81%) believe the **ability to schedule healthcare appointments online would make the scheduling process easier** and 79% want the ability to use technology when managing their healthcare experience.

- Three-fifths (61%) would like their healthcare experience to be more like the customer experience of an online convenience service app, such as Uber or Instacart.

- **Technology is Making a Difference:** 75% have found technology helpful when working with a new healthcare provider such as getting test results, asking medical questions, or paying medical bills.

- While nearly 3 in 5 Americans (59%) would be open to having a virtual appointment for their first visit with a new provider, **adults ages 65+ are much less likely** to feel this way (37% vs. 65% under age 65).

Implication:

"Providers need to change now or watch as others who do a better job at offering convenience and customer service take over their roles as community caregivers" says Tegria's Director of Patient Access and Technology.



WAVE 95

WAVE 95 INTRODUCTION

The following research was conducted between **February 4 - 6, 2022** by The Harris Poll. Fielded among a nationally representative sample of **2,027** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

PAY ME MORE OR I QUIT: WORKERS PLAY RISKY GAME WITH THEIR BOSSES: BLOOMBERG-HARRIS POLL

Introduction:

Half of America's workers are ready to pile pressure on their employers according to our latest data in [partnership with Bloomberg News](#). They've spent the past two years heeding their bosses' – and the pandemic's – unprecedented demands, and now they want more. Here's what we found:

- Just over half of all Americans have ever asked for a raise, **yet the results weren't astounding** as three-quarters say the largest raise they've ever received was less than 50% of their salary.
- **The new way to get a raise?** Six in 10 (61%) Americans say using a job offer from another company for the sole purpose of receiving a pay raise **is an ethical practice**.
- Over half (55%) of workers say they are likely to seek out a job offer as leverage for a raise at their current firms – and **a quarter of Americans (27%) have already done so**.

- **Employers beware:** Employees mean business as **19% have quit** when they weren't given their requested raise.
- If offered outside roles, nearly two-thirds (64%) say they **would quit their current jobs**, with Millennials the most likely to jump ship, followed by Gen Z, Gen X, and Boomers.

Implication:

Employees should be careful of these ultimatums as even if employers do match outside offers. It might decrease their willingness to invest in you if you seem ready to leave, says Catherine Golladay, head of Schwab Workplace Financial Services.

Section:

02

Topic:

SPOTIFY SCANDAL: DIVIDE OVER FREE SPEECH AND PREVENTING MISINFORMATION

Introduction:

Despite a majority of Spotify users siding with Joe Rogan in the Neil Young controversy, over a quarter (28%) are considering switching platforms and a fifth plan to or have already canceled (21%). Here's what we found:

- Over half (55%) of **Spotify users familiar with the controversy are on Joe Rogan's side**, saying: "one artist shouldn't be able to call for the censorship of another; especially when musical artists use curse words, mistreatment of women, and violence in their lyrics. All artists are entitled to equal freedom of speech."
- The other side (45%) are with Neil Young, saying "artists should be able to use any influence they have to raise awareness for issues they believe are important and Joe Rogan is spreading misleading information that could harm the public's health."
- **Rocking in the Free World:** However, among the general public, two-thirds (66%) of Seniors 65+ and (56%) of all Americans familiar with the controversy are on Neil Young's side.
- **For What It's Worth:** Those 18-34 are divided (51% Joe Rogan; 49% Neil Young) and those 35-44 are on the side of Joe Rogan (56% vs 44%).

Implication:

Companies reliant on subscriptions need to be aware of how some content may alienate users enough that they leave over disagreements with what is being said, something Spotify is reckoning with as they try to [grow beyond a 100 million users by 2025](#).

Section:

03

Topic:

AMERICANS DISAPPROVE OF BEIJING GAMES AND WANT BOYCOTT, POLL FINDS: SPORTICO-HARRIS POLL

Introduction:

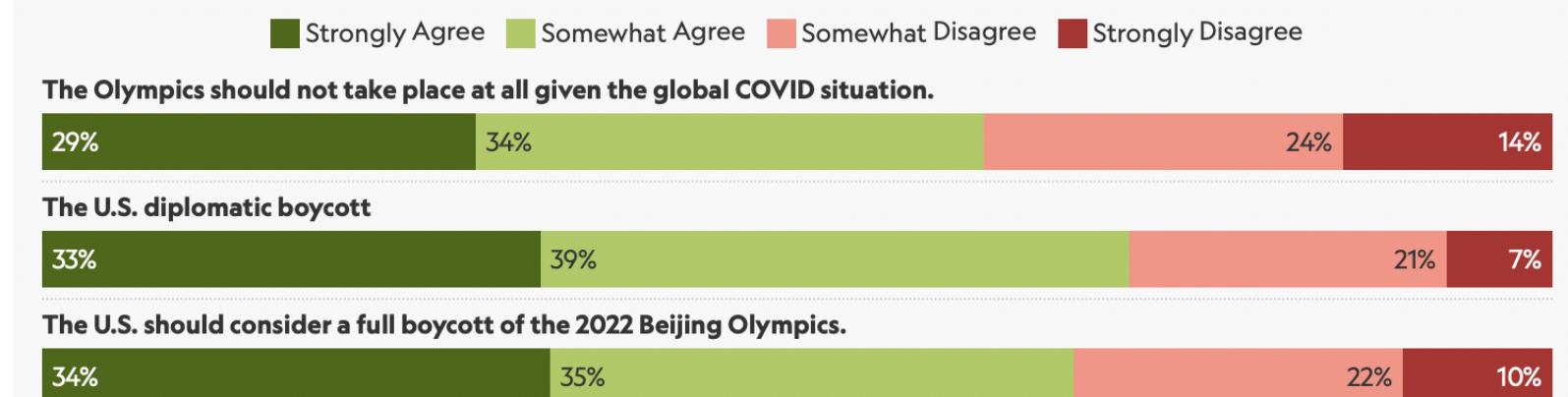
If you sense that fewer people care about the 2022 Olympics than usual, you'd be right according to our [latest survey with Sportico](#). In fact, a majority of Americans don't believe they should be even taking place due to COVID and China's human rights record.

- Three-fifths (62%) of Americans agree that due to COVID, **the Winter Olympics should not be occurring** at this time - with even Democrats (71%) and Republicans (55%) in agreement.
- Nearly three-quarters (72%) **agree with the decision by the U.S. government on their diplomatic boycott** due to Chinese human rights abuses, with Democrats (79%) and Republicans (70%) also in agreement.
- **Older generations are also on board:** 84% of Boomers think the diplomatic boycott was the correct move, compared with 75% of Gen X, 63% of Millennials, and 54% of Gen Z.

- Further, 69% of Americans would have somewhat or strongly considered a complete boycott of the Olympics by **not sending athletes to compete** (Republican: 68%, Democrat: 74%).

How the American Public Feels About the 2022 Winter Olympics

69% of Americans strongly agree or somewhat agree that the United States should have considered a boycott of the 2022 Winter Olympics, while 62% don't even believe that the Games should be taking place due to the pandemic.



Full question text: "Do you agree or disagree with each of the following statements?"

Chart: Lev Akabas • Source: Harris Poll / Sportico

Implication:

It's not just our survey: while the Olympics is typically a significant event for marketers due to viewership, [Sports Illustrated is reporting the current competition](#) is on track for the lowest-rated Winter Olympics in American television history.

Section:

04

Topic:

THERE IS NO ONE PATH BACK TO THE OFFICE, BUT THERE ARE SOME BEST PRACTICES: OFFICESPACE SOFTWARE- HARRIS POLL

Introduction:

While most workers have returned to the office, a majority don't want to work there full time, and the complete return remains in flux according to our survey with OfficeSpace Software and [featured in Forbes](#). Here's what else we learned:

- Most working from an office pre-pandemic (54%) have already returned full time. Despite this finding, many of those workers (51%) **are not interested in going into one daily.**
- **But they might not have final say in the matter:** Almost half (48%) of respondents reported that their employers want their organizations to come back to the office full time.
- What is revealing is how many would **quit their jobs** (43%) if their employer forced them to return to the office daily.

- **What do workers miss about office life?** Many miss the social time with colleagues (73%), in-person collaboration and meetings (29%), and a dedicated workspace (29%). **But a majority (55%) don't miss the work commute.**
- Most employees concur on mandated vaccination proof, employer inducements for receiving the vaccine and mandatory masking for all employees (70%).

Implication:

The result means that companies and organizations must walk a fine line to reopen offices properly and return to some semblance of normal operations – even as “normalcy” is difficult to achieve and even harder to define.

Section:

05

Topic:

ENTERTAINMENT: AN INDUSTRY SNAPSHOT

Introduction:

Our [recent report](#) on the current state of the entertainment industry explores consumer trends across virtual events, streaming services, and NFL fandom. We look at popular entertainment brands, ranking the leaders in brand equity and growth. Here's what we found:

- While many Americans (45%) are wary of attending in-person events given the current COVID-19 situation, **over half (52%) feel isolated at virtual events.**
- Younger streamers use more services as 21% of Millennials - compared to only 6% of Boomers - **use seven or more streaming platforms.**
- **Almost half (46%) of Millennials** say they are **likely to cancel a streaming subscription** in the next three months, versus 20% of Boomers.
- The NFL sees a surge in momentum with younger fans: **Gen Z (33%) and Millennials (30%)** reported most often that they **watched more NFL games this season than last** (v. 22% of Boomers).
- Lastly, **Netflix** topped the list of entertainment brands in Q4, with a **brand equity score of 71.5%.**
- **Fox News Channel** saw the **greatest growth in brand equity with 2.6% growth from Q3 to Q4, 2021.**

Implication:

The entertainment industry is constantly evolving and brands must keep abreast of developing trends to meet or exceed future consumer expectations.



WAVE 94

WAVE 94 INTRODUCTION

The following research was conducted between **January 28 - 30, 2022** by The Harris Poll. Fielded among a nationally representative sample of **1,998** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

U.S. BUSINESSES ESTIMATED TO LOSE \$1.2 TRILLION ANNUALLY TO POOR COMMUNICATION: GRAMMARLY-HARRIS POLL

Introduction:

In our latest data in [partnership with Grammarly](#) and covered by [Yahoo! Finance](#), business leaders illuminate why success in a hybrid landscape hinges on improving communication. Here's what we found:

- Over 9 in 10 business leaders report that **poor communication impacts productivity, morale, and growth**, contributing to increased costs, missed or extended deadlines, and reputational erosion.
- While (96%) of business leaders agree effective communication is essential, nearly three-quarters (74%) report their **company underestimates the cost of poor communication**.

- Three-quarters of business leaders (75%) say they **spend too much time and energy** resolving miscommunications.
- Employees spend nearly half of a 40-hour workweek on written communication alone (19.93 hours), and business leaders (88%) and employees (63%) alike **wish their company had better and more effective communication tools**.
- **Communication is key:** companies that grew revenue in the last year were more likely to say their team communicates effectively (92%, v. 81% whose revenue declined or didn't change).

Implication:

"Businesses must stop ignoring the impact of poor communication...It's time for a reckoning of how we communicate in the digital workplace and empower teams to be successful" says Dorian Stone, Grammarly Head of Organizations Revenue.

Section:

02

Topic:

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

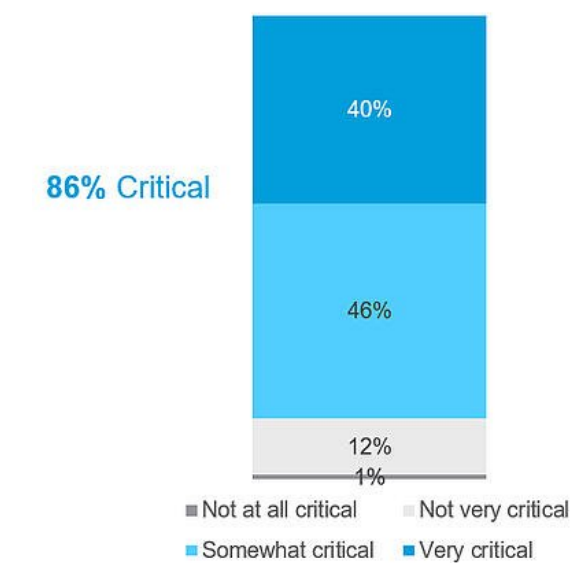
Introduction:

Our recent [survey with Sisense](#) found that companies offering data and analytics to their customers have a competitive advantage and reap the benefits of increased revenue and loyalty. Here's what we found:

- Most (97%) note that customers want analytics more personalized to the specific end user and (57%) believe that customers would find prescriptive analytics most useful.
- Over half (53%) of product decision makers wish their analytics experience was more aligned with user-friendly entertainment applications, such as Netflix and Spotify.

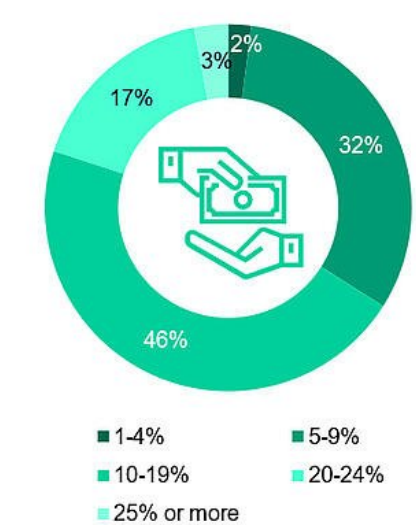
- Nine in 10 (92%) report that data and analytics are critical for business success, and (86%) say that offering data and analytics to their customers **plays a critical role** in customer satisfaction, engagement, and retainment.
- For a direct tie to the bottom line, (96%) note that an **increase in average selling prices** would be possible with personalized and customized analytics.

Role of Data and Analytics in Building Loyalty & Retaining Customers



91% agree data and analytics are table stakes for their industry. 46% strongly agree.

Potential Increase in Amount Charged for Products & Services



Implication:

Sisense Chief Product and Marketing Officer, Ashley Kramer, expects “organizations will redefine what it means to build a ‘culture of analytics’ by bringing insights to workers in a more digestible way, such as embedding them into regular processes so no new skills are required.”

Section:

03

Topic:

WORKERS WANT TRAINING, DEVELOPMENT, BUT FEW SAY THEIR EMPLOYERS PROVIDE IT: AMERICAN STAFFING ASSOCIATION-HARRIS POLL

Introduction:

Workers rank professional development and training opportunities highly among their list of criteria for evaluating prospective employers in our survey with American Staffing Association and [covered by HR Dive](#). Here's what we found:

- Eight in 10 (80%) consider professional development and training offerings to be important when accepting a new job.

- However, **employers are failing to provide these opportunities** as only four in ten (39%) said their current employers have these available.
- Lack of career development is a concern for many employees as more than one-third (37%) reported being **concerned that automation would cost them their jobs**, with **Millennials (52%) and Hispanic (49%) the most worried**.

Implication:

A note for employers: the development opportunities need to be accompanied by real career paths, including opportunities for advancement internally, as well as forward-looking conversations between workers and their managers.

Section:

04

Topic:

THE CLOUD BOOM ISN'T OVER YET: MICROSOFT- HARRIS POLL

Introduction:

Our recent survey in partnership with Microsoft and [covered in MarketWatch](#) finds that while the pandemic has turned the cloud industry on its ear, top executives believe the cloud boom is far from over. Here's what else they have to say:

- More than 9 in 10 corporate decision-makers (92%) expect an **accelerated acceptance of cloud tech**, especially hybrid and multicloud offerings, over the next few years.
- Roughly two in three executives (65%) said their **use of hybrid-cloud technology increased significantly** over the course of the pandemic, and (60%) said the **same about multicloud**. Those numbers are expected to jump to (72%) and (67%), respectively, over the next two years.
- Nearly all executives (97%) said they need to be able to adopt cloud technology in some areas of their business.

Implication:

Microsoft's Erin Chapple, corporate vice president of Azure Core, says "customers need flexibility and choice," who calls the survey an "independent validation of what we are seeing in the field."

Section:

05

Topic:

INVESTORS PUSH CHICAGO COMPANIES TO INCREASE SOCIAL RESPONSIBILITY: CRAIN'S CHICAGO BUSINESS-HARRIS POLL

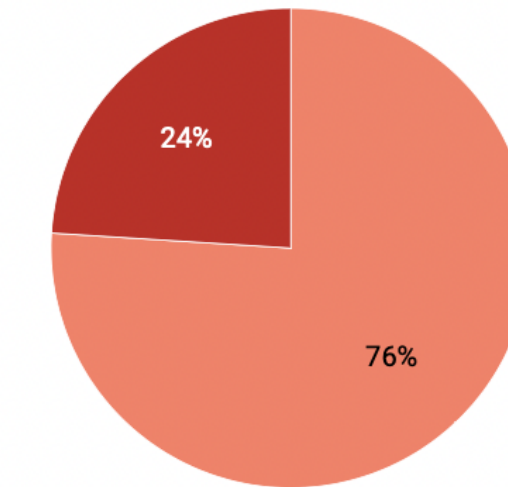
Introduction:

As consumers and shareholders favor socially conscious companies, Chicago organizations are encouraged to strengthen their environmental, social and governance focus according to our latest data in partnership with [Crain's Chicago Business](#).

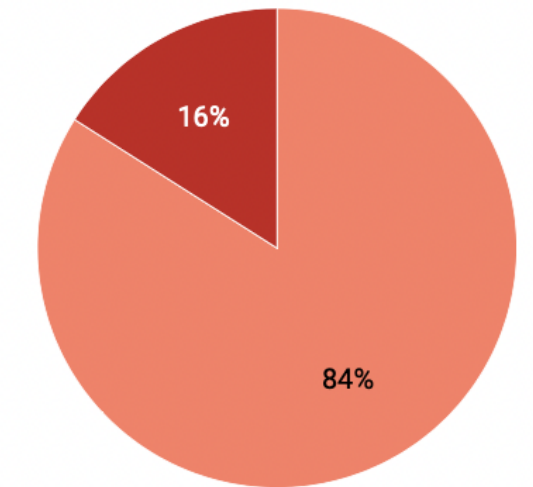
- Chicagoans believe local businesses have effectively addressed issues with workforce diversity and inclusion (66%) and improved relationships with employees (59%).
- Yet, many believe company **responses to other social initiatives have fallen flat** as over half of residents think local businesses have ineffectively addressed climate change (59%) and executive/employee pay disparities (58%).

The survey asked: "How much do you agree with each of the following statements?"

Agree
Didn't agree



Percentage who say they are an environmentally conscious person.



Percentage who say they are a socially conscious person.

Created with [Datawrapper](#)

Businesses have a responsibility to protect the environment.

84%

I have a more favorable opinion of businesses that support environmental initiatives.

78%

Business have a responsibility to be a force of social good.

72%

I have a more favorable opinion of businesses that support social causes.

83%

- **It's not just consumers:** Investors care as well about ESG values with (40%) Chicago investors actively considering ESG factors, and (37%) researching a company's ESG profile before investing.
- Further, (81%) of Millennials and (65%) of Boomers say they **are more likely to invest** in companies whose policies promote positive social change.

Implication:

Chicago-area companies should follow the lead of other major companies in strengthening their ESG focus, similar to Walgreens and Boeing's commitment to utilizing clean and sustainable energy sources in their operations.



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.



WAVE 92

WAVE 92 INTRODUCTION

The following research was conducted between **January 14 - 16, 2022** by The Harris Poll. Fielded among a nationally representative sample of **2,089** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

COVID'S HIT TO OUR HEALTHCARE SYSTEM

Introduction:

The number of COVID hospitalizations across the U.S. has [reached a new pandemic high](#), causing significant strain on healthcare systems and providers. We checked in with Americans to see what their concerns are regarding the current surge:

- Most Americans are concerned about shortages of healthcare workers (80%), hospital beds (78%), hospital ventilators (72%), COVID testing kits (67%), and N95/KN95 masks (64%).
- Three-quarters (72%) of Americans are **concerned about having access to a hospital bed themselves** if needed, an increase compared to the 65% who were concerned at the end of December. Vaccinated Americans are more concerned about access than the unvaccinated (78% vs 54%).
- Over half (53%) of Americans and 61% of those vaccinated **support prioritizing vaccinated patients** for ICU beds over unvaccinated COVID patients (v. 27% of the unvaccinated).
- [The Wall Street Journal](#) looks at how hospitals are reducing patient capacity as nurses are out sick with COVID.

Implication:

The overwhelming strain of COVID hospitalizations has impacts beyond the ICU, with many burnout [healthcare providers leaving the field completely](#) and [patients skipping routine care](#) to prevent COVID exposure.

Section:

02

Topic:

AMERICANS VALUE "HEALTH AND SAFETY" OVER IN-PERSON LEARNING: AXIOS/HARRIS POLL

Introduction:

Americans say that it's more important to protect the health and safety of teachers and students by moving to remote learning to avoid COVID exposure than to keep schools open for in-person learning, according to [our poll covered exclusively in Axios](#). Here's what we found:

- Over half (56%) of Americans say **protecting the health and safety of teachers and students** is the most important priority, while 44% say it's more important to have **in-person learning to avoid further interrupting students' education**.
- More than 6 in 10 Gen Z, Millennial, and Gen X respondents chose health and safety over in-person learning, as did 62% of parents with children under 18.
- Only 37% of GOP respondents chose health and safety, compared with 57% of Independents and 70% of Democrats.
- Respondents of color were also more likely to prioritize health and safety than white respondents, although a majority of all races and ethnicities did so (69% Hispanic, 62% Black, 54% White).

Implication:

There's no doubt that 2020's in-person learning shutdowns were bad for kids, particularly those from lower-income households or families of color. On the other hand, while it's rare for kids to get severe COVID cases, it does happen. Kids can also spread the virus to their potentially-vulnerable caregivers, and some teachers and school staff are at high risk.

Section:

03

Topic:

MAJORITY OF AFFECTED AMERICANS APPROVE OF PSYCHEDELICS AS AN ALTERNATIVE TREATMENT TO ADDRESS ANXIETY, DEPRESSION AND PTSD

Introduction:

Our new poll on behalf of Delic Holdings Corp and [covered in Forbes](#) reports that nearly two thirds (65%) of Americans who suffer from anxiety/depression/PTSD believe that psychedelic medicine should be made available to patients with these mental health conditions.

- Most (83%) of Americans experiencing anxiety, depression, or PTSD would be open to pursuing alternative treatments.
- These patients said if alternative medicines were “proven more effective than prescription medication with fewer side effects,” (66%) would try ketamine, (62%) would try psilocybin, and (56%) would try MDMA.
- One-fifth (18%) of people surveyed said that traditional pharmaceutical medication did not improve their condition or even made it worse.
- [VICE News explores](#) what legal psychedelic therapy and access will be like in the U.S., and if it will be accessible.

Implication:

"We are witnessing a silent crisis impacting people across the globe exacerbated by an ongoing pandemic, and the results of this survey should compel more medical professionals and lawmakers to support in-depth studies on the therapeutic benefits of psychedelic medicine," said Matt Stang, co-founder and CEO of Delic.

Section:

04

Topic:

THE 9 MOST POPULAR INSURANCE AD CHARACTERS, RANKED: AD AGE-HARRIS POLL

Introduction:

Insurance marketers have flooded the airwaves with characters and mascots in recent years, but the critter that started it all still reigns supreme with viewers, [according to our new survey with Ad Age](#). Here's who else made the list:

- First Place: 40% of Americans '**strongly like**' **Geico's gecko**, with an additional 35% saying they 'somewhat like' the lizard. That amounts to a 75% favorability rating for the 23-year old character.
- Coming in second is **Jake from State Farm**, who notched a 69% favorability rating and 83% of Americans aware of the character.
- **Allstate seemed to recognize the popularity of these characters** when it opted to bring back its Mayhem character after he was sidelined for more than a year: two-thirds (67%) have a favorable view of the character.
- Even our last place finisher at 9th, **Jamie from Progressive** - originally the side-kick for Flo (#5 on our list) - holds a favorable view of more than half (52%) with (87%) of Americans being aware of her.

Implication:

One reason these characters remain popular: they make intangible insurance products more tangible. Half (48%) of consumers told us the mascots make it easier to relate to insurance brands, while only 34% said the same thing about real-life celebrity backers.

Section:

05

Topic:

79% OF BABY BOOMERS WANT TO KEEP WORKING, BUT WITH MORE FLEXIBILITY: EXPRESS PROS-HARRIS POLL

Introduction:

Seventy-nine percent of workers 57 to 75-years old said they would rather be semi-retired than leave the workforce entirely, according to [our survey in partnership with Express Employment Professionals](#) and [featured in Fortune](#). Here's what they're looking for:

- The majority of employees say they'd be likely to partake in semi-retirement, either by having a flexible work schedule (79%), transitioning to a consulting role (66%) or working reduced hours with reduced benefits (59%).
- **Companies have so far been slow to propose semi-retirement options to workers:** only 21% said their workplace offers such arrangements.

- More than half (58%) wish their company offered more help for transitioning to retirement and around a third (32%) say planning for retirement is a challenge they're currently facing, though this has decreased from 2018 (41%).
- **Top of mind when considering when to retire is financial preparedness:** a majority (68%) are worried about saving enough for retirement.

Implication:

Employers will eventually have no choice but to let older employees work on their own terms. Bill Stoller, CEO of Express Pros, frames it as “an issue that may not be solved for many generations, so companies must use all the available tools at their discretion to build the labor force of the future that is substantial and competent.”



WAVE 91

WAVE 91 INTRODUCTION

The following research was conducted between **January 7 - 9, 2022** by The Harris Poll. Fielded among a nationally representative sample of **2,037** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

LEARNING TO LIVE TOGETHER

Introduction:

As Americans [grapple with the new phase of the pandemic](#), many are realizing we may never see the last of COVID as it becomes endemic. Here's what Americans are thinking:

- In September 2021, we found only one-third (32%) of Americans said they expected to live with COVID in some form indefinitely, while 44% thought it would be eradicated within two years.
- Now, most (71%) Americans **believe we will be living with COVID in some form forever**, with only 29% saying it will eventually be eradicated.
- Older generations (77% of Boomers and 75% of Gen x) are the least optimistic we will ever see the last of COVID (vs 65% of Millennials and 62% of Gen Z).
- **Surging Variants:** Nearly all (87%) Americans expect a variant similar to Delta and Omicron to emerge in 2022.
- **Across the pond:** [Spain is calling on Europe](#) to debate the possibility COVID should be treated as an endemic illness akin to the flu.

Implication:

As new variants emerge and [vaccines are made to counter them](#), America may need to confront that COVID will become endemic and adjust to continued surges, restrictions, and new variants.

Section:

02

Topic:

ARE OFFICE CAREERS BETTER THAN SKILLED TRADE JOBS? NOT ACCORDING TO MOST AMERICANS: FAST COMPANY-HARRIS POLL

Introduction:

Americans broadly see education as a pathway to workplace success, even as it's become more cost prohibitive for many, according to our latest poll with [Fast Company](#). Here's what else they think:

- Three-quarters of Americans (74%) agree that some form of higher education such as trade school or a college degree is **essential to future success**.
- **Say one thing, expect another:** Yet while 65% of Americans agreed that trade and office jobs are equally promising, only 9% expected their child to attend any kind of technical school.
- Society emphasizes higher education, yet **fails to make it affordable** as 7 in 10 say that **growing costs** prevented at least one friend or family member from pursuing it.

- One solution supported by 72% of Americans would be to **make community college free** for its students.
- **What about graduates?** Three-quarters (76%) agreed that student loan forgiveness would have a positive impact on most Americans.

Implication:

Allowing office workers to see what their colleagues on the front-lines are like may be an educational experience for many that benefits the culture of the company as a whole. [Just ask DoorDash](#), who will be mandating all employees make deliveries – even the CEO.

Section:

03

Topic:

77% OF AMERICANS CONCERNED ABOUT RANSOMWARE, IP THEFT, AND ATTACKS ON CRITICAL INFRASTRUCTURE: MITRE-HARRIS POLL

Introduction:

[Our recent survey with MITRE](#) on innovation found Americans are concerned about the nation's research and development (R&D) and innovation trajectory, especially in relation to China. Here's what else we found:

- More than half of Americans (55%) believe the federal government **should be investing more on technology R&D** to stay ahead of China.
- More Americans **believe the U.S. is trailing China** in technology R&D (37%) than being ahead of them (31%).
- Over three-quarters (77%) of Americans are **concerned about ransomware attacks** and 86% would consider them and other cyber attacks on U.S. infrastructure and manufacturing as **acts of terrorism**.
- Two-thirds are even concerned about **using telecommunications equipment developed in non-democratic countries** such as China.
- Artificial intelligence (AI) doesn't fare any better as the majority of U.S. residents are concerned about AI being used for **malicious intent** (75%) and the lack of transparency in AI systems (72%).

Implication:

Given the high levels of concern among Americans about ransomware and cyber attacks, technology and communication entities should be cognizant of marketing their safety and protection protocols to settle anxiety and sway consumers.

Section:

04

Topic:

SAVINGS ARE UP, BUT NEW YEAR'S RESOLUTIONS BRING FINANCIAL REQUIREMENTS: CIT BANK-HARRIS POLL

Introduction:

According to our latest survey with [CIT Bank](#), 70% of Americans are saving the same amount or more money compared to last year. Here's how they're doing it:

- Of those planning 2022 resolutions, 54% are **prioritizing their finances by budgeting, saving, and investing.**
- Over three-quarters (77%) of those planning a financial resolution are focused on saving, followed by improving credit scores (48%), spending less money (48%), reducing debt (47%), investing more (43%), and contributing to 401k and HSA plans (24%).
- **More savings means more flexibility** as 88% of respondents who are saving more this year compared to last believe that it has allowed them to be more flexible in **how and when they spend** their money.
- There is room for balance as 49% of those with a new year resolution **do plan to purchase something**, such as a material item or subscription service, to fulfill their resolution.

Implication:

While some consumers are ready to purchase, many are holding off, so companies will need different marketing strategies for each group – as well as be cognizant of potential consumer behavior changing once federal student loan payments resume.

Section:

05

Topic:

‘2022 WEALTH & WELLNESS INDEX’ SHOWS MANY AMERICANS LESS CONFIDENT IN THEIR FINANCES & THE ECONOMY ENTERING THIRD YEAR OF PANDEMIC: EMPOWER RETIREMENT-PERSONAL CAPITAL-HARRIS POLL

Introduction:

Even though the U.S. economy is making a remarkable comeback after enduring a tumultuous two years, our [latest survey](#) in partnership with Empower Retirement and Personal Capital finds that Americans’ views of their financial health are languishing.

- Consumer confidence in the economy has dropped from 52% prior to the pandemic to 40% today.
- Only a third (34%) of American consumers **identify as “very financially healthy,”** a (14%) drop from March 2021 (48%).
- However, 40% do feel hopeful and optimistic about their path towards optimizing their financial health.

- **Americans are also prioritizing financial goals in 2022** as when asked what their top new year’s resolution is, paying off personal debt (37%) and saving for retirement (36%) now surpass traditionally common goals like exercising more (33%) and losing weight (28%).

Implication:

Financial entities would be apt to boost their marketing outreach, especially to groups who traditionally forgo, as consumers are increasingly seeking financial advice as Personal Capital’s CMO, James Burton, reports “an 88% increase in net new client assets, excluding market gains.”

Questions?

RYAN LINDER

Global Chief Marketing Officer, EVP, Stagwell

ryan.linder@stagwellglobal.com

JOHN GERZEMA

CEO, The Harris Poll

jgerzema@harrisinsights.com



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