

COVID-19 CONSUMER RESEARCH EXECUTIVE SUMMARIES PART 3

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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 60

WAVE 60 INTRODUCTION

The following research was conducted between **May 21 - 23, 2021** by The Harris Poll. Fielded among a nationally representative sample of **2,072** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

IS THE CDC'S NEW MASK POLICY WORKING OUT? TIME-HARRIS POLL

Introduction:

As demand for vaccinations drops nationwide, states are turning [to increasingly dramatic measures to convince people to get their shots](#). But perhaps the boldest incentive yet has come from the CDC, which last week said that fully vaccinated people can go mask-less, inside and out. More from our new survey in partnership with TIME featured in their [Coronavirus Brief newsletter](#):

- Nearly four in ten (37%) of people vaccinated in the last seven days said that the **CDC's new mask policy encouraged them to get a shot**.
- **But the data also reveal an arguably more interesting finding:** When asking those who'd been vaccinated in the last seven days why they'd gotten a shot, almost half (48%) said **they got vaccinated, at least in part, because they wanted to protect themselves around mask-less unvaccinated people**.
- Although the theme behind driving forces revolves around protecting oneself from the virus, more than half (53%) of those vaccinated in the last seven days **reported wanting to protect others who could not get the vaccine themselves**. This figure was also high for those who plan to get vaccinated (49%).
- Yesterday, [Colorado was the latest state](#) to introduce a lottery system to entice stragglers.

Why Americans say they've recently gotten vaccinated, or plan to soon get vaccinated

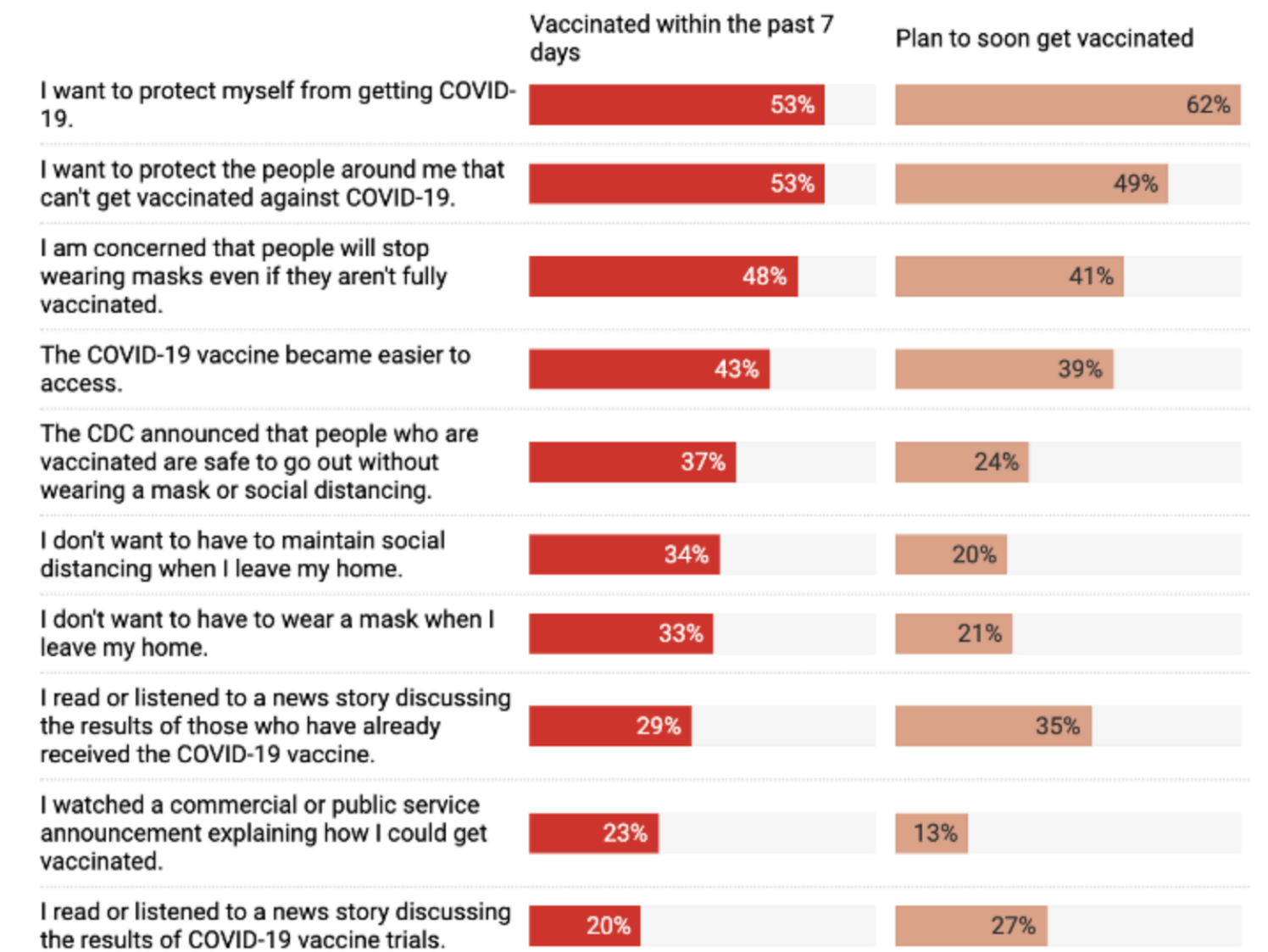


Chart: Elijah Wolfson for TIME • Source: TIME/Harris Poll

TIME

Implication:

Whether that was the CDC's intended result or not, it does seem that its mask policy is affecting people's decisions about vaccination. And with demand slowing, any uptick, regardless of reasoning, is a good sign.

Section:

02

Topic:

PANDEMIC PETS: RASH DECISION OR LIFELONG FRIEND?

Introduction:

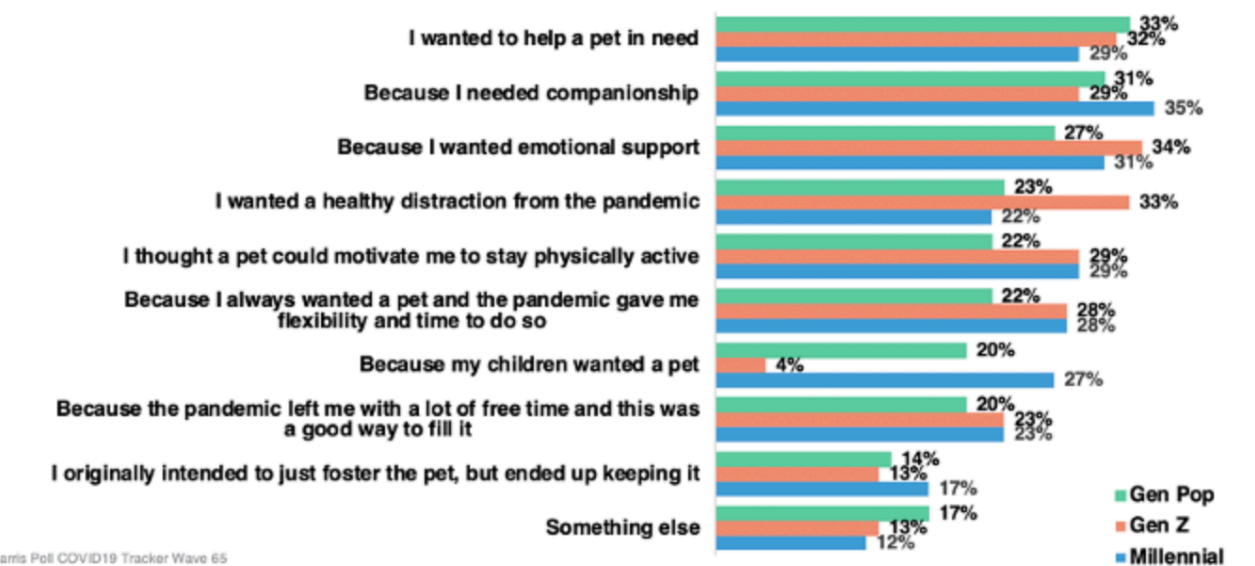
The lockdown in the early months of the COVID pandemic made Americans realize a harsh truth: they were lonely. Many resorted to adopting pets as a proxy for companionship and shelters couldn't keep up with the demand. Now that the country is returning to normal, some pets are being returned and shelters are facing potential overcrowding.

- Four in ten (44%) of Americans **took in a pet during the pandemic**, whether it be through adoption, buying from a breeder, or a foster fail. Nearly half (48%) consider themselves first time pet owners.
- **Altruism is to blame:** One third (33%) say they got a pandemic pet because they **wanted to help an animal in need**. For younger Americans, however, the **need for companionship** (35% Millennials), and the **emotional support of a pet** (34% Gen Z) were the driving factors behind bringing home a friend.
- Three-quarters (73%) of those who brought in a pandemic pet said they **never considered returning it**. Millennials, however, were most likely to say that **they at least considered it** (37%). Ironically, Millennials were one demographic most likely to get a pet (61%).
- Most Americans (40%) think owners **rushed their decision to get a pet**, which is why they are returning them. In terms of what Americans think is an acceptable reason to return a pet, one third (32%) say that **not being able to afford the pet is understandable**.

THE HARRIS POLL: COVID-19 IN THE U.S.

Overall, Altruism Is Impetus for Getting Pandemic Pets; Younger Americans Look for Companionship and Emotional Support

Why did you decide to get a pet during the pandemic? Please select all that apply.
Among those who got a pet during the pandemic



Source: Harris Pet COVID-19 Tracker Wave 65
BASE: GOT A PET DURING PANDEMIC (n=4,773)
RPP03 Why did you decide to get a pet during the pandemic? Please select all that apply.
Harris Insights & Analytics LLC, A Bayview Company © 2020

Implication:

Americans are returning to the office full-time but that doesn't mean your pet has to suffer with adjusting to not having their "pawrents" home. Consider the advice the [American Kennel Club](#) shares when it comes to transitioning your pet to being home alone.

Section:

03

Topic:

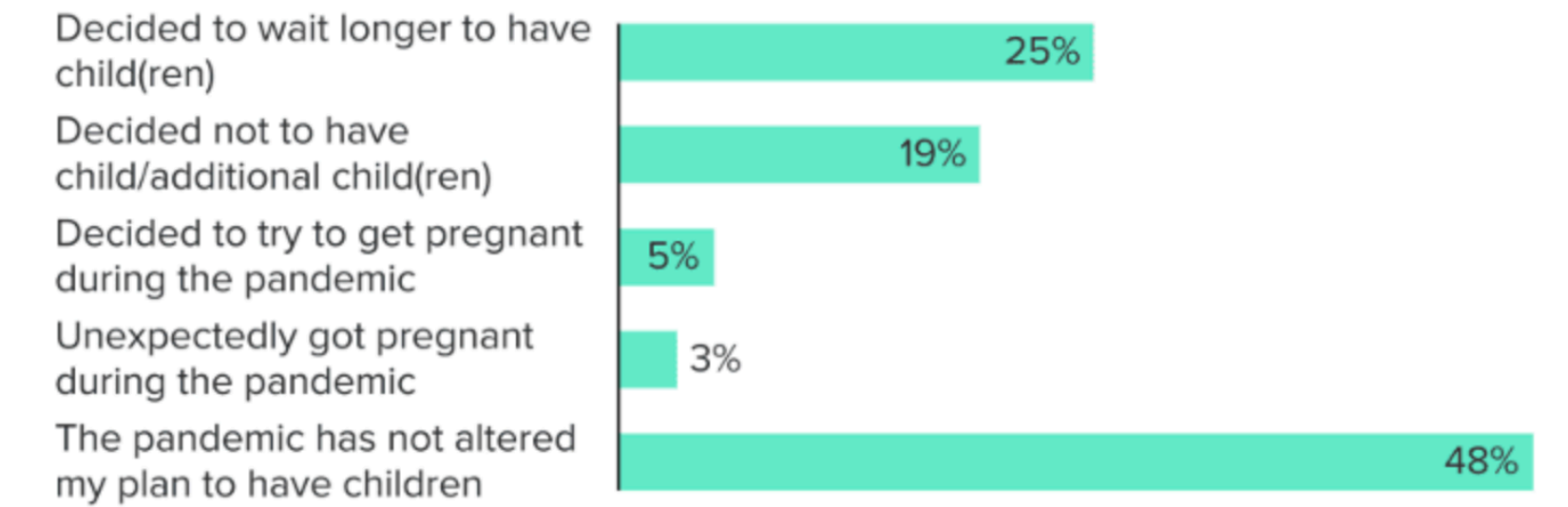
OLDER MILLENNIALS UNCERTAIN ABOUT EXPANDING THEIR FAMILIES: CNBC- HARRIS POLL

Introduction:

[This week in our partnership series with CNBC "Middle-Aged Millennials,"](#) we take a look at the effect of two economic crises on the decision to have children.

- A quarter of Older Millennials (25%) say they decided to wait longer to have children because of the pandemic.
- **Some are avoiding having children altogether.** One in five (19%) of Older Millennials say they have **decided not to have a child or additional children at this time because of the pandemic.**
- Among those who find they want children less following the pandemic, the most common reason is that **they don't want to bring a child into the world right now, followed by uncertainty about the economy.**

Which of the following ways did the COVID-19 pandemic alter your plans to have children?



Source: The Harris Poll/CNBC survey of 1,000 older millennials ages 33-40 in March 2021.

The Harris Poll

Implication:

While it's too early to tell what impact the pandemic will have on birth rates specifically among Older Millennials, data indicates that Americans typically have fewer children during and immediately after economic downturns, says Phillip Levine, an economics professor at Wellesley College who has studied birth rates.

Section:

04

Topic:

THE DNA OF WORK HAS CHANGED: USA TODAY-HARRIS POLL

Introduction:

With the COVID-19 pandemic waning, a hybrid model that allows employees to work from home part-time seemed to be gaining favor among companies and workers, we find in our survey shared exclusively with USA Today.

- Four in ten (40%) of Americans prefer to **work from home full-time**, compared with (35%) who seek a **home-office hybrid** and (25%) who want to go **back to the office full-time**.
- Workers' top concern about returning to their cubicles is **losing the flexibility remote work provides** (36%). Many workers also point to social anxieties, too. (35%) are leery of **having to engage in small talk**; and (28%) of **having forgotten how to socialize**.
- Although most of those surveyed would like to work from home at least part-time, (36%) say their companies **expect all employees to be back in the office full time in the next four to six months** and another (29%) say they'll need to be back **by the end of the year**.
- Nearly half (47%) say their firms haven't surveyed employees or provided them a platform to express concerns to gauge their interest in returning to the office full-time.

Implication:

The wants of employees seem to be clashing against most U.S. businesses that want their workforce back in the office, but companies will likely need to find middle ground or be willing to lose workers.

Section:

05

Topic:

WHOLE FOODS, STARBUCKS USE CRYPTO - SHOULD LOYALTY PROGRAMS BE NEXT? FORBES- HARRIS POLL

Introduction:

The current, post-pandemic environment is pretty near perfect for [cryptocurrency's spread](#). Consumers quickly adapted to a range of new technologies in the past year, so their appetite for change has been whetted. Forbes writes more about our survey conducted on behalf of [Couponcabin.com](#):

- Nine in ten (89%) of Americans have **at least heard of cryptocurrencies**, with seven in ten (71%) being familiar with **Bitcoin** - the world's largest crypto by market cap.
- **You can't hold loyalty in your hand:** (44%) of Americans are interested in receiving encrypted, digital currencies, such as Bitcoin, Ethereum and Dogecoin, as an alternative to traditional cash-back reward programs from retailers.
- More than three in ten Americans (31%) describe cryptocurrencies as the **"future of money."** Not surprisingly, **younger consumers are early adopters** – nearly (28%) of millennials own or have owned some form of cryptocurrency.

- **Some major retailers are now accepting the currencies:** [Starbucks](#) allows its rewards members to convert crypto to cash balances on their cards using an app called Bakkt. [Whole Foods, Nordstrom, Ulta, and Crate & Barrel](#) also accept the Spend app, which allows customers to use crypto for payment.
- [CNBC looks at](#) how brands are capitalizing on the popularity of the meme cryptocurrency Dogecoin.

Implication:

Cryptocurrencies are changing fast, and they are altering the financial industry with equal speed. If retail loyalty adopts them, it can expect the same. By tracking the successes and missteps of early adapters, retailers may get a real hold on crypto success.



WAVE 59

WAVE 59 INTRODUCTION

The following research was conducted between **April 8 - 21, 2021** by The Harris Poll. Fielded among a nationally representative sample of **42,935** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

IS AMERICA READY FOR NORMAL?

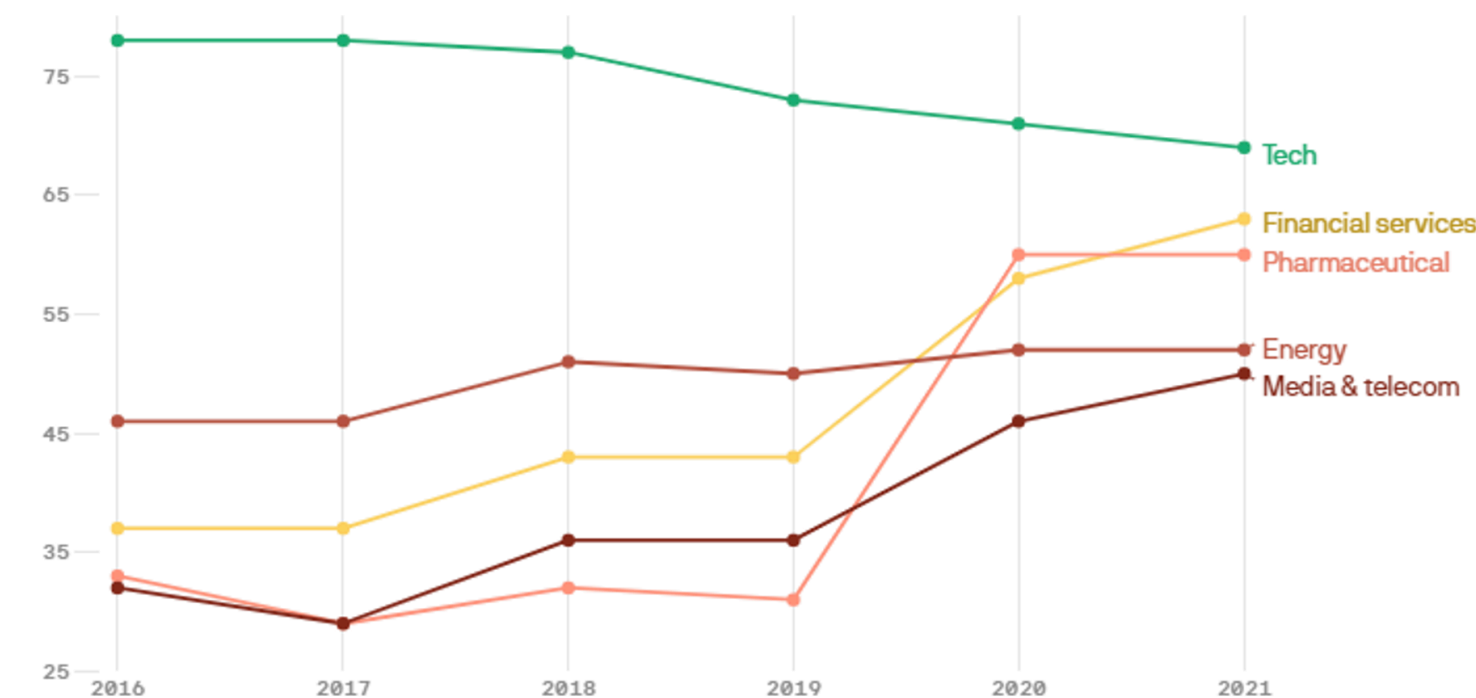
Introduction:

The financial services, telecom, and pharmaceutical sectors all gained ground with the public this year, [while the biggest tech companies saw their reputations erode](#).

- **Financial services companies** like JPMorgan Chase & Co., State Farm Insurance, Goldman Sachs, Mastercard, and others **saw huge gains in response to the role they helped play in the [country's financial recovery](#)**.
- **Pharma's reputation score got a big boost thanks to the addition of Moderna to the reputation 100 list and Pfizer's improving score**. The sector would've probably been even higher this year, if it weren't for Johnson & Johnson's flat year-over-year performance.
- **Media and telecom companies** like Comcast, Verizon, and AT&T **saw strong gains as people became [more reliant on broadband](#)**. Streaming firms like Netflix and Hulu saw some declines, in response to streaming fatigue.

Harris 100 industry reputation scores

Industry average scores 2016-2021



Industries are colored by their 2021 score of [Excellent](#), [Very good](#), [Good](#), [Fair](#) or [Poor](#)

Implication:

Even though Americans were hyper-connected to their devices throughout the pandemic, their relationship with many of the world's biggest tech firms has continued on a downward trend, suggesting that people see their products as necessary evils.

Section:

02

Topic:

A DIVIDED NATION FLOCKS TO PARTISAN BRANDS

Introduction:

After a tumultuous election season, [brands with clear partisan identifications are becoming more popular](#). Americans want to use and support brands that align with their values, not just their budgets.

- **Patagonia is the top brand in America.** The brand, which in 2017 sued the Trump Administration to protect national monuments, took a further turn left last year, by sewing a clear (and profane) message in its clothing ahead of the election.
- **Several prominent conservative brands performed well, too.** Chick-fil-A moved up in the rankings, Hobby Lobby appeared on the list for the first time, as did Goya, which became a political lightning rod [after the company's CEO praised then-President Trump](#).
- Americans listed MyPillow and the Trump Organization among **the companies they're most aware of**, but both have strongly negative reputations. The Trump Organization came in last place in this year's rankings.

| 2021 RANK | COMPANY | TREND 2016-20 | 2021 SCORE | CHANGE IN RANK |
|-----------|---------------------|---------------|------------|----------------|
| #1 | Patagonia | | 82.7 | ↗ 31 + |
| #2 | Honda Motor Company | | 81.6 | ↗ 14 + |
| #3 | Moderna | | 81.3 | - + |
| #4 | Chick-fil-A | | 81.1 | ↗ 7 + |
| #5 | SpaceX | | 81.1 | - + |
| #6 | Chewy | | 80.9 | - + |
| #7 | Pfizer | | 80.2 | ↗ 54 + |
| #8 | Tesla Motors | | 80.2 | ↗ 10 + |
| #9 | Costco | | 80.1 | ↘ 2 + |
| #10 | Amazon.com | | 80.0 | ↘ 7 + |
| #11 | REI | | 79.9 | - + |
| #12 | USAA | | 79.2 | ↗ 9 + |
| #13 | Wegmans | | 79.2 | ↘ 7 + |
| #14 | Subaru | | 79.2 | - + |
| #15 | Unilever | | 79.2 | ↗ 20 + |
| #16 | Apple | | 79.1 | ↗ 11 + |

Implication:

This year's reputation rankings reflect a [return to normalcy](#) in the business world. While many of the most polarizing companies are doing better than last year, they aren't necessarily the most visible companies.

Section:

03

Topic:

PFIZER, MODERNA REPUTATIONS SOAR POST- VACCINE

Introduction:

2021 is the year for [vaccine producers](#), at least reputationally. Moderna and Pfizer shot up the ranks this year. Moderna is Americans' third-favorite company this year, and Pfizer came in at 7th — up from #61 a year ago.

- CVS climbed 13 spots since last year **but Johnson & Johnson isn't getting the same bounce from its [coronavirus vaccine](#)**. It fell four spots, slipping to #72 on this year's list — considered a "good" but not "excellent" or "very good" corporate reputation.
- Both Pfizer and Moderna **scored 10 to 20 points higher across all measures when compared to last year's results**. Pfizer rose 54 places on the list, [while Moderna did not make the 2020 top 100 at all](#).
- **Something to keep in mind:** A year ago, when Americans were still sanitizing our groceries and figuring out how to live in a state of lockdown, Clorox was America's favorite company. Instacart, Peloton, and Zoom leapt onto the list for the first time in 2020. **None of these companies made the top 100 this year.**

Implication:

America's affections have shifted away from the companies that helped us manage pandemic life and toward the vaccine manufacturers that are helping to end it.

Section:

04

Topic:

BIG TECH'S REPUTATION TAKES A PANDEMIC PLUNGE

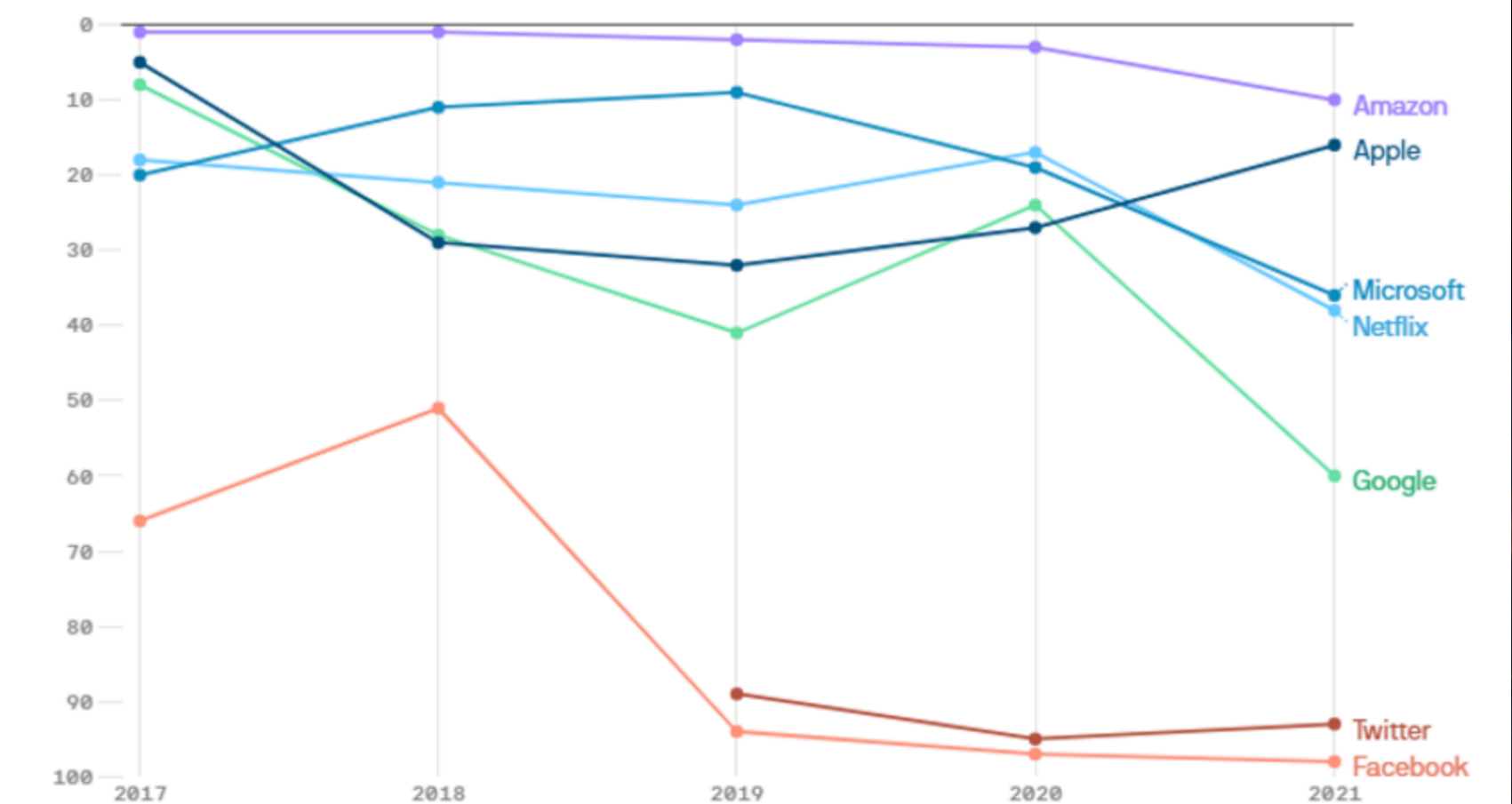
Introduction:

Despite their role in helping users stay connected through pandemic-era isolation, Americans have fallen further out of love [with Big Tech](#).

- **The biggest loser** among tech giants was Google, which faced PR headwinds in 2020 as the government sued it for [monopolistic practices](#).
- However, Apple, which spent the last year making record profits and [touting its privacy protections](#), was the **only tech giant to substantially improve its reputation score**.
- Companies that **sell products and services to businesses and individuals** — like Microsoft, Apple, Sony, and HP — **fared much better than ad-supported social media and information tech companies** like Facebook, Google, Twitter, TikTok, and Reddit.
- Social media leaders Facebook and Twitter **failed to improve their standing near the bottom of the list**. Both social media platforms find themselves in the bottom 10 ranking for every reputation dimension.

Harris 100 tech company rankings

2017-2021



Companies are colored by their 2021 score of [Excellent](#) [Very good](#) [Good](#) [Fair](#) or [Poor](#)

Implication:

Although tech's reputation does not compare favorably to other industries in our poll, the [Big Five still found a way to win the pandemic](#) monetarily - which is probably also why Americans do not view them with a sympathetic lens.

Section:

05

Topic:

THE REHABILITATION OF WELLS FARGO

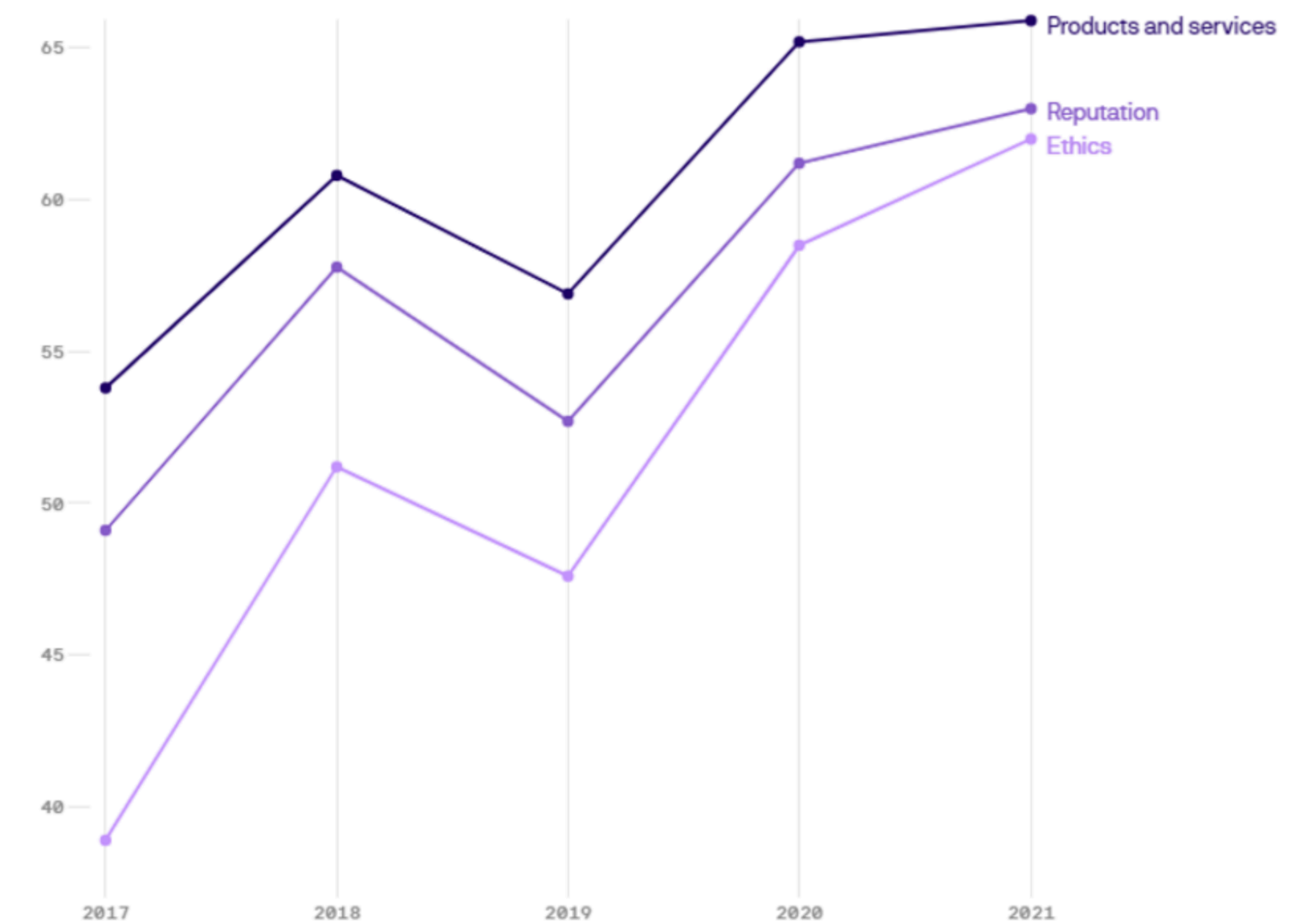
Introduction:

The bad news started with the revelation in 2016 that the bank had created millions of fake accounts and opened them without the account holders' permission or knowledge. It didn't end there — a series of scandals followed, tarnishing Wells Fargo's reputation — and that of its former CEO. But now, Wells Fargo is no longer viewed as the [least ethical big company in America](#).

- Overall, Wells Fargo's reputation score of 63.0 in 2021 **puts it well ahead of Facebook**, tied with TikTok, and slightly behind Comcast.
- Wells Fargo's Ethics score of 38.9 in 2017 was **by far the lowest in the history of the study**. This year, it has recovered to 63.0 — a big jump, even if it's still in the bottom five.
- **Other banks have also been improving**. The reputation score for Bank of America, for instance, increased from 59.7 to 70.5 between 2017 and 2021.
- **Banks are generally unloved**, with the notable exception of USAA, which has outperformed in every year of the survey. And **Wells Fargo remains at the bottom of the banking pack**. That said, the **sector as a whole is improving**.

Wells Fargo Harris 100 scores

2017-2021



Implication:

After hitting extreme Axios-Harris lows in 2017, Wells Fargo embarked upon a massive [public rehabilitation campaign](#) in 2018. It seems to have worked.



WAVE 58

WAVE 58 INTRODUCTION

The following research was conducted between **May 7 - 9, 2021** by The Harris Poll. Fielded among a nationally representative sample of **2,062** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

IS AMERICA READY FOR NORMAL?

Introduction:

As vaccination numbers continue to climb, COVID cases around the U.S. are steadily declining signaling the return to normal is near. But after a year of quarantine and virtual gathering, getting back to real-life in person interactions feels like a foreign concept, are we ready?

- End in sight: Today two-thirds (67%) believe that the worst of the pandemic is behind us, a staggering comparison to just (33%) at the end of 2020. Boomers and GOP members (74%) are particularly optimistic compared to Gen Z (50%) and Democrats (64%).
- Cautious optimism: Although the approval rating for the vaccine rollout is high (76%), two-thirds (65%) say they still fear a new wave, down from (70%) in the beginning of April. And only less than half (46%) feel comfortable visiting family or friends without a mask today, even with the new CDC guidelines.
- With an end in sight, anxiety about returning to normal is setting in: Today, (61%) of Americans say they're anxious about returning to normal public activities and socialization, which is highest for Millennials (69%) (vs 59% Boomers for comparison). And while bars and restaurants are opening up, less than a quarter (22%) of Americans tell us they would feel comfortable socializing with a stranger at a bar.

Implication:

Returning to "normal" might be a little awkward as documented in last weekend's SNL skit Post-Quarantine Conversations. Thankfully, the folks at The New York Times curated a guide to re-entering society.

Section:

02

Topic:

HOT SPOTS STILL A LITTLE TOO HOT: USA TODAY-HARRIS POLL

Introduction:

The latest data from Harris Poll shared exclusively with USA Today finds that even with bustling airports again, more than half of Americans aren't ready to travel internationally. Some more insights:

- Travelers ready to go today skew younger as (62%) of Millennials and (60%) of Gen Z want to pack their bags, while just (26%) of Boomers say the same.
- Among the majority of Americans who say they aren't open to traveling internationally today, (58%) say they aren't sure if or when they will ever be ready.
- Despite America being in 'revenge travel' mode (67% say "the worst of the pandemic is behind us" vs. (33%) in January), nearly three-quarters say "fear of different variants" has impacted their interest in traveling abroad. Yet among those who will grab their passport (23%) are not deterred by the variants.

Implication:

"Travel is still considered a high-risk activity for a number of people even though it's starting to take off," John Gerzema, CEO of The Harris Poll said, "and international travel, is amplified, obviously."

Section:

03

Topic:

THREE WAYS BRANDS CAN BUILD TRUST FOR THE POST-COVID WORLD: AD AGE- HARRIS POLL

Introduction:

Trust can make or break a brand, and it's especially critical during times of change, Will Johnson, CEO of The Harris Poll, says about our latest survey in partnership with Ad Age. More about the data behind building brand trust:

- Risks have never been higher: two-thirds (63%) of Americans state that a brand that loses its trust cannot earn it back.
- A strong majority of Americans (60%) said that well-known brands taking stands on social issues is more important than in the past. Gen Zers and Millennials overwhelmingly share this stance (70% each).
- Why do consumers feel this way? A majority (53%) say that companies have "more platforms and tools at their disposal to speak to and influence a large number of people."
- More than three-quarters (76%) said that they expect companies to follow through on the stances they take, and (50%) said that they should donate money to causes they profess to support to back up their words.

Implication:

"We're at a turning point in the pandemic, where expectations, needs and desires are evolving rapidly," Will Johnson says. "Smart CEOs should be taking steps now to build, maintain or augment consumer trust for the long haul."

Section:

04

Topic:

DESPITE EVERYTHING, MOST OLDER MILLENNIALS ARE CONTENT WITH HOW THEIR LIVES TURNED OUT: CNBC-HARRIS POLL

Introduction:

This week in our partnership series with CNBC “Middle-Aged Millennials,” we take a look at the psyche of the Older Millennial and determine their level of content with life so far and what contributes to making them feel that way.

- Our survey explored a variety of topics — including health, technology usage, families, and future ambitions — and found that (78%) of Older Millennials said they were satisfied with their lives.

- Money matters: Those Older Millennials whose household income is above \$150,000 a year are nearly universally content (94% who were “somewhat” or “very much” content), while those bringing in less than \$50,000 a year are less content (63% in the same categories).
- Where you live may have only a slight effect on happiness: (80%) of Older Millennials who live in a major city with more than 4 million people said they were very content with their lives, and (76%) of those in the suburbs said the same.

Implication:

Despite obstacles like student loans and entering the workforce on the heels of the Great Recession, most Older Millennials are content with the way their life has turned out thus far.

Section:

05

Topic:

APPLE IOS 14.5 USERS MIGHT BE MORE AMENABLE TO BEING TRACKED BY BRANDS: AD AGE- HARRIS POLL

Introduction:

Apple's system update has kept the ad world on edge as iOS 14.5 now requires users to opt in to sharing data and being tracked by apps. But according to our new Ad Age-Harris Poll, while consumers are concerned about data collection, most aren't taking steps to actively avoid it.

- Nearly half (47%) of iPhone users on the most recent iOS update would allow Facebook to track and share iPhone data, compared to just (19%) of users not on iOS 14.5.
- Millennials tend to be more security minded than their Gen Z counterparts: Millennials (42%) are more likely to have done research to understand how the data collected by apps is used, compared to (31%) of Gen Z users and (29%) of all U.S. adults.
- Concern about personal data collection remains high, with (70%) of U.S. adults at least somewhat concerned about personalized internet ads. Gen Z users are reportedly the least concerned age group, with only (53%) somewhat concerned about personalized ads.

Implication:

Although Apple's new feature is a win for users and a step in the pro-privacy protection direction, apps like Facebook, that take in billions in revenue from targeted ads, are putting up a fight and argue that the changes are self-serving to Apple, and don't actually protect consumer privacy.



WAVE 57

WAVE 57 INTRODUCTION

The following research was conducted between **April 30 - May 2, 2021** by The Harris Poll. Fielded among a nationally representative sample of **2,096** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

THERE'S NOT JUST ONE KIND OF VACCINE HESITANCY: AXIOS-HARRIS POLL

Introduction:

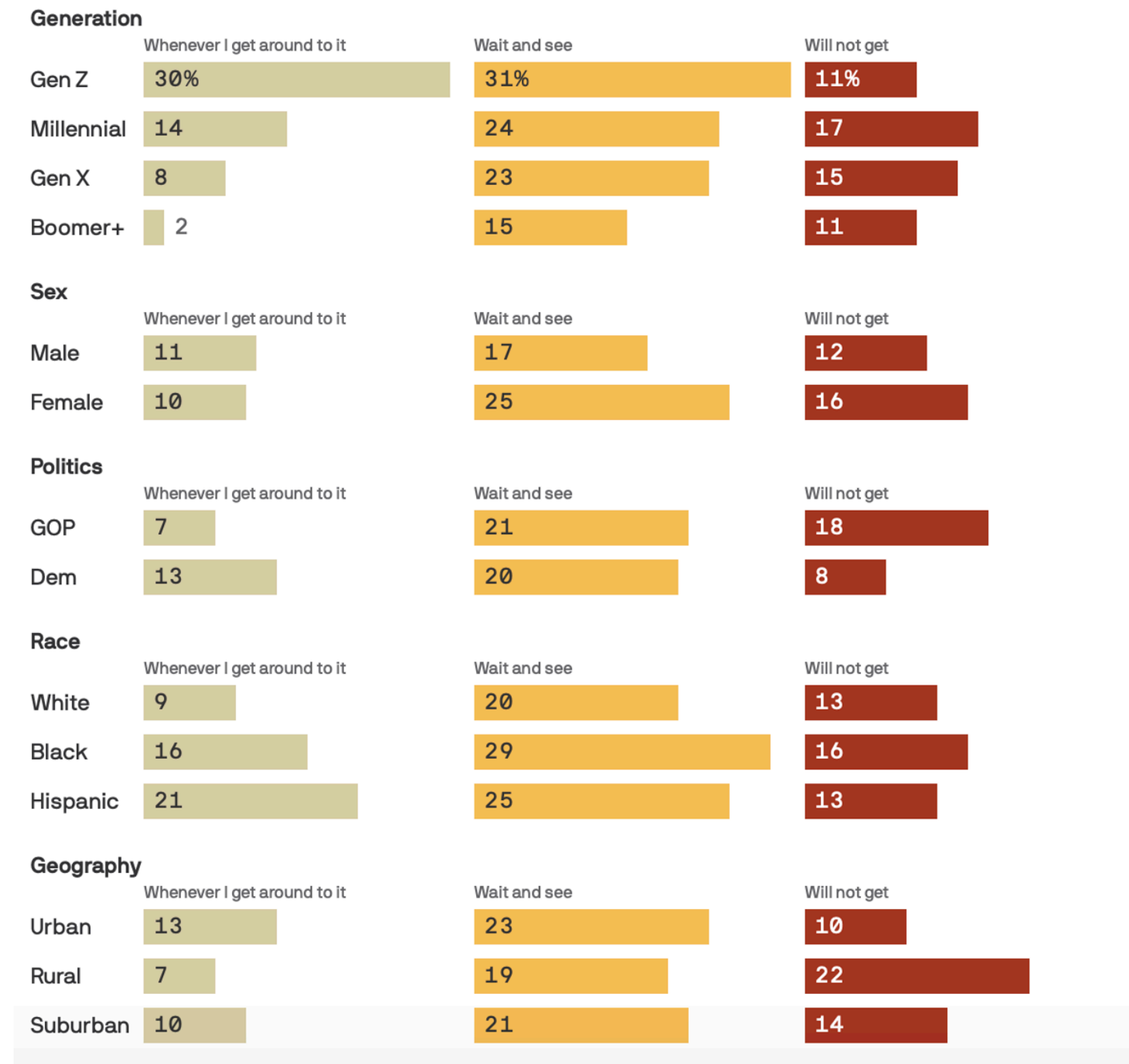
Our new survey with Axios, [featured in Mike's AM](#), looks at the hard work ahead convincing vaccine-hesitant. But there's more than one type of hold-out, our research finds:

- **With 56% now having had one shot, the available pool of vaccine eager Americans is suddenly shrinking:** In our new data over the weekend, of those remaining unvaccinated, 10% said they'll get the vaccine whenever they get around to it, and 21% said they will wait awhile and see before getting the vaccine. And 14% said they won't get a vaccine.
- The 'lowest-hanging fruit' is now the one-in-ten Americans who aren't vaccine-hesitant, per se, but procrastinating or not prioritizing it in their lives currently.
- Gen Z (30%) are more likely than their older generational counterparts to **say they will get the vaccine whenever they get to it**, while Black Americans (29%) are most likely to say **they want to wait and see**.
- Democrats and Republicans poll closely when it comes to those who say **they will wait and see** (20% vs. 21%). But GOP members are **twice as likely to say they will not get vaccinated** (18% vs. 8%).

Breaking down vaccine hesitancy

Poll of 2,097 Americans, April 23-25, 2021. To the question: "Which of the following best describes your mindset when it comes to getting the COVID-19 vaccine when it becomes available to you?"

Whenever I get around to it Wait and see Will not get



Implication:

John Gerzema, CEO of The Harris Poll, says "As those Americans most eager to get the vaccine have now been able to do so, the hard part of earning the trust of those with hesitations or who don't view it as a top priority begins."

Section:

02

Topic:

WHY ARE AMERICANS SKIPPING THEIR SECOND DOSE?

Introduction:

Millions of Americans are now fully vaccinated, but now, as some of the less eager line up to get their shots, we are seeing a spike in skipped second doses - why? Here's what we found:

- One third (34%) report **wanting to make sure they don't have any negative side effects from the first dose** and nearly a quarter (23%) say they think **one dose is enough to keep them safe**.
- Interestingly, Gen Z are more likely to **prolong their second dose** (23%), while those who fall under the "wait and see" vaccine plan are more likely to **skip the second dose completely** (19%).
- **One shot isn't enough:** "There's a 36-fold difference of getting fully vaccinated versus partially," Dr. Anthony Fauci [said at a news briefing Friday](#). And, what's worse is, [it's possible to reach herd immunity, then lose it. Repeatedly.](#)
- **If second doses are a problem, what about booster shots?** Two thirds (65%) report that they will get a booster shot every time they need one but 14% say they will **get one starting next year**, and 9% will only **get a single booster this fall/winter**.
- **Companies are stepping in to make vaccinations easier**, such as [Microsoft, Starbucks and Amazon who are offering the government assistance with logistics and operations](#). Meanwhile, others are getting creative like [Miller Lite](#) who is now offering "vax time tees" designed for "maximum ease" during vaccine appointments.

Implication:

The harder fix here will be countering misconceptions around vaccinations. [One approach in Colorado uses tactics from get-out-the-vote](#), utilizing phone bank volunteers with scripts to address questions about the vaccine and counter misinformation.

Section:

03

Topic:

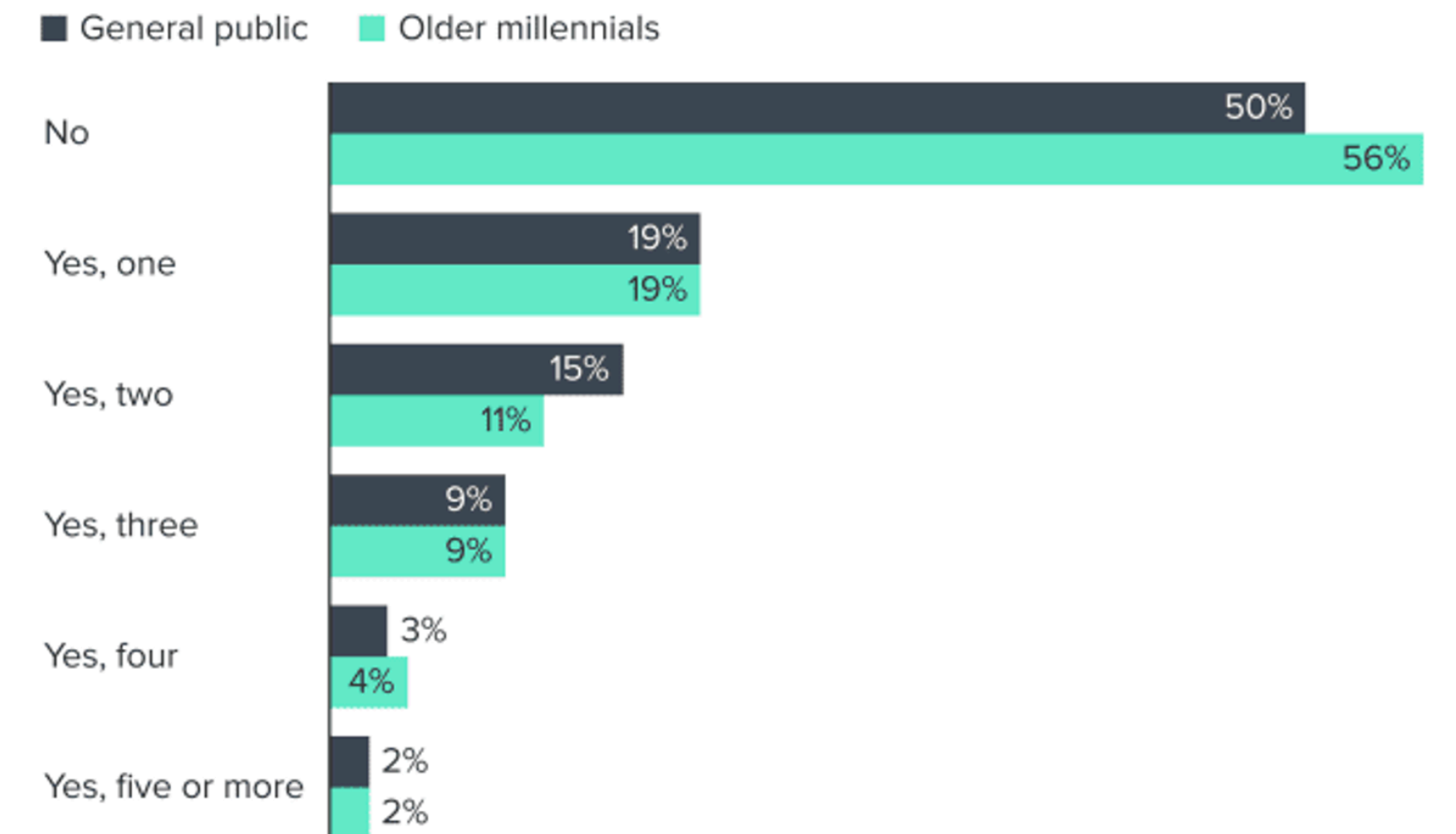
THE FUTURE FOR OLDER MILLENNIALS SUFFERING FROM CHRONIC HEALTH CONDITIONS: CNBC-HARRIS POLL

Introduction:

[This week in our partnership series with CNBC "Middle-Aged Millennials,"](#) we look at what the future holds for Older Millennials who are battling chronic health conditions. Here's what we found:

- Nearly half (44%) of Older Millennials report having **at least one diagnosed chronic illness**, with a quarter (26%) having **two or more**.
- **What's affecting Older Millennials?** The top three conditions that Older Millennials are reporting are: migraines (26%), major depression (23%), asthma (19%).
- Older Millennials are most **notably less likely than the general population** to suffer from hypertension (15% vs. 32%) and high cholesterol (25% vs. 11%) and obesity (10% vs. 13%).

Do you have any chronic medical conditions? If so, how many?



Source: Survey of 4,012 U.S. adults, with at least 831 respondents ages 33 to 40, conducted in April 2021.

Implication:

Dealing with increased chronic health conditions, Older Millennials are now facing new financial burdens as out-of-pocket costs continue to rise in addition to continuing to deal with the economic effects of the pandemic.

Section:

04

Topic:

THE BIGGEST REMAINING CHALLENGE IN STOPPING THE CORONAVIRUS: SLATE-HARRIS POLL

Introduction:

America is dealing with a paradox, citizens want their freedom to live a mask-free life but at the same time are not willing to roll up their sleeves and get the vaccine. [Slate takes a deep-dive into the latest Harris Poll data](#) to understand where the disconnect is happening and why.

- Vaccine refusers were three times as likely as vaccinated people to say **that they had become more lax about masks and social distancing**. They were also nearly twice as likely to say they had **slacked about avoiding crowds and limiting travel**.
- When asked for reasons not to get the vaccine as soon as it becomes available, 13% of refusers said [“I don’t need to get it if enough people are vaccinated.”](#)
- When thinking about “getting back to normal,” one third of vaccine refusers agreed that **once enough people in their community get the vaccine, we will be at herd immunity**.

Implication:

The more Americans that do not get vaccinated, [the higher the chances are that we see new mutations of the virus](#) which means more cases of COVID, and in turn we get further from our already vulnerable goal of reaching herd immunity.

Section:

05

Topic:

A RETURN TO NORMAL EDUCATION ISN'T WHAT KIDS NEED: CHICAGO TRIBUNE-HARRIS POLL

Introduction:

Will Johnson, CEO of Harris Poll, discusses findings from our national survey that asked parents to assess their children's experiences in grades K-8 over the past year, when almost all of them, at least as some point, were taught at home in [this piece for the Chicago Tribune](#).

- Overwhelmingly, parents said they want their children **in school with their teachers and classmates in the next academic year**. Two-thirds would like in-person instruction to resume full time while only 6% think **full-time at-home instruction would be optimal**.
- Parents say **classroom education should be modified**, but are conflicted about what is most needed. Three in 10 would like **more focus on social skills, increased use of technology at home, more group work, smaller class sizes, increased use of technology in the classroom, and more homework**.

- But almost as many parents (22%) **want less homework**. And while 23% see the need for a **faster-paced curriculum to make up for lost learning**, another 23% want a **slower-paced curriculum to help their children readjust**.

Implication:

There's no question that many children have suffered socially, emotionally, and intellectually over the past school year but there are benefits to remote learning and it would be a shame if we couldn't find a way to take the best attributes of both to create a new, amplified way to learn.



WAVE 56

WAVE 56 INTRODUCTION

The following research was conducted between **April 23-25, 2021** 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:

MOST AMERICANS SAY THEY SHOULD BE VACCINATED BEFORE THE U.S. DONATES COVID-19 SHOTS ELSEWHERE: STAT-HARRIS POLL

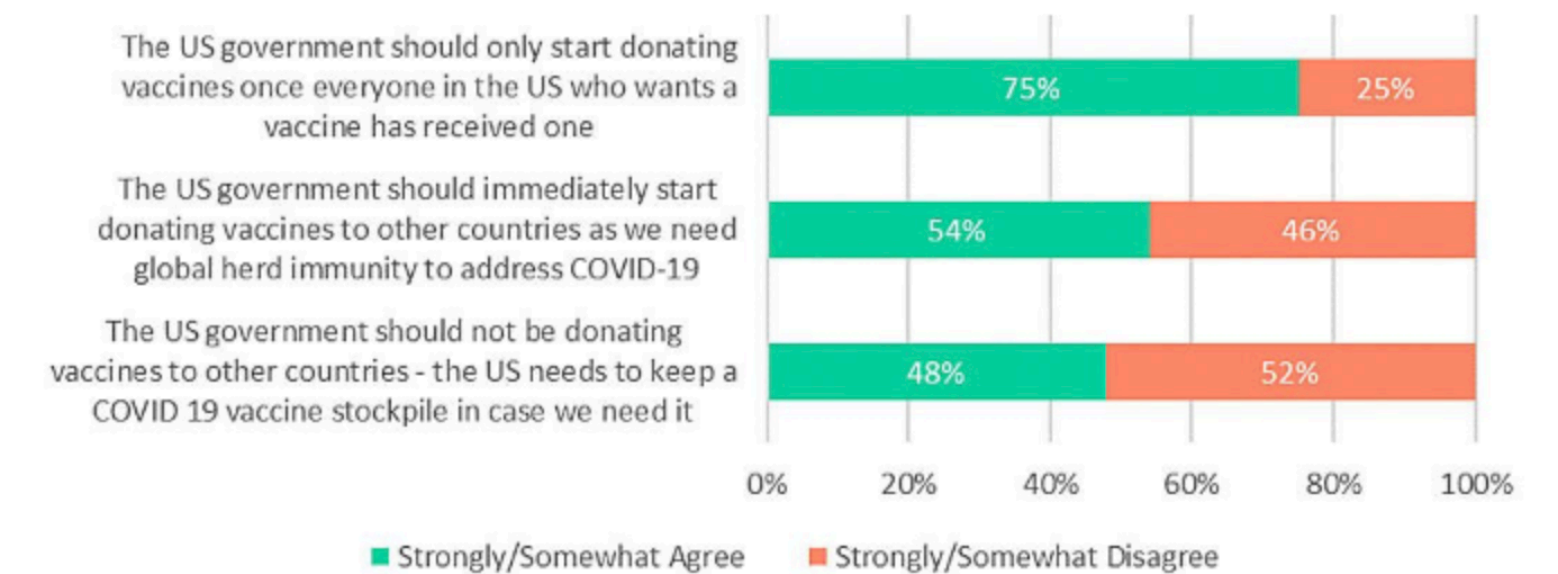
Introduction:

In our [new survey with STAT](#), we found that three-quarters of Americans believe the U.S. government should start donating COVID-19 vaccines to other countries, but only after every person in the U.S. who wants a vaccine has received one. Here's what else we found:

- Younger Americans (59% Gen Z, 65% Millennials) are more likely to say the U.S. government should start to immediately donating vaccines to other countries, compared to older Americans.
- On the flipside, 48% agree that the **U.S. government shouldn't donate vaccines at all**, and instead create a stockpile. Three-fifths (58%) of GOP members agree, while only 44% of Democrats feel the same way.

- On Monday, the White House announced it would [share as many as 60 million doses of the AstraZeneca vaccine](#) as part of an effort to help developing countries fight the pandemic. Officials also announced exploration into options for urgent dispatch of oxygen and other supplies to help India fight a [record-breaking second wave](#).

How much would you agree or disagree with the following statements related to the US government donating vaccines to other countries



Implication:

We need other solutions to reduce global vaccine shortages, in fact, researchers at Duke [suggest](#) “vaccine diplomacy” by using additional funding mechanisms and supporting more licensing deals between vaccine makers and companies based in other countries.

Section:

02

Topic:

THE BAD NEWS ABOUT THE J&J PAUSE: AXIOS-HARRIS POLL

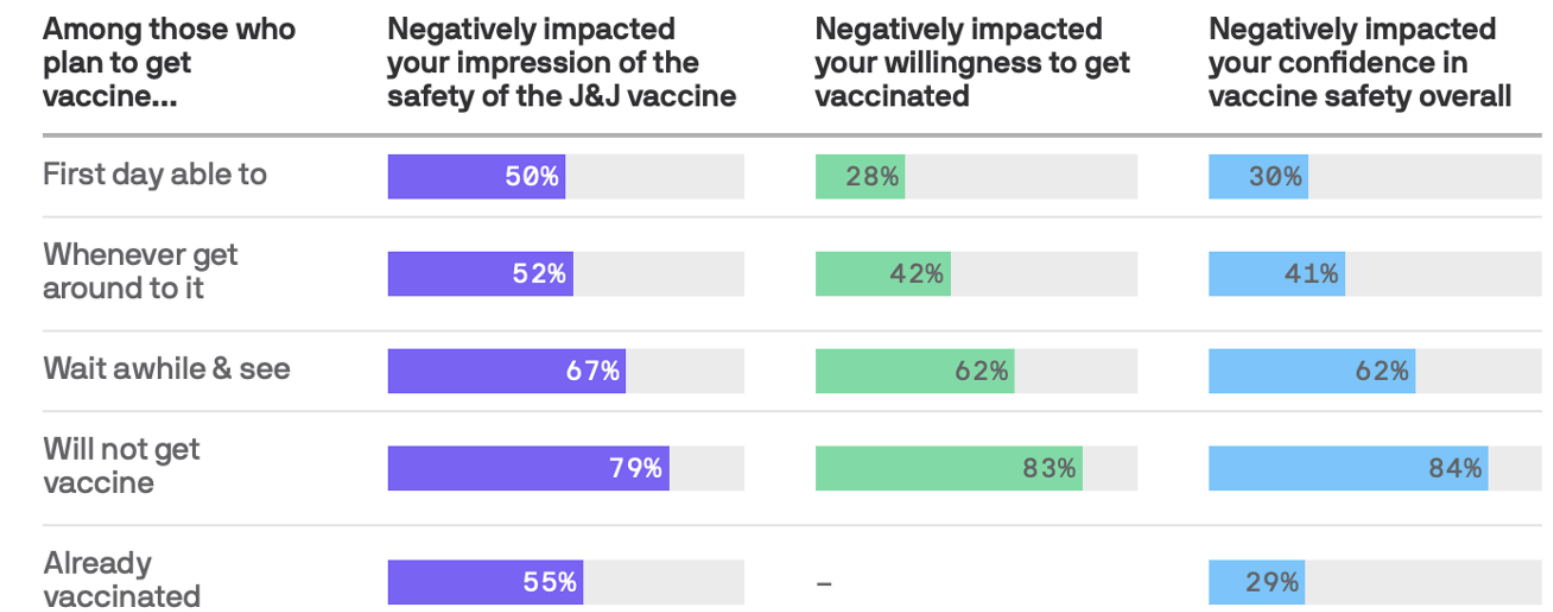
Introduction:

Publicity surrounding the Johnson & Johnson vaccine's possible link to blood clots has had a negative effect on those already hesitant to get vaccinated, [according to a new Harris Poll shared exclusively with Axios](#).

- Those who are “vaccine eager” (plan to get vaccinated the first day they are able to) say the pause gives them more confidence (41%) than hesitation (36%), while those who are “vaccine hesitant” (will wait awhile and see before getting vaccinated) **say it gives them more hesitation than confidence** (53% vs. 27%).
- While three-fifths (58%) of those who are “vaccine eager” would be willing to get the J&J vaccine once reinstated, only 39% of those who are “vaccine hesitant” say the same.
- The pause had an overall negative impact on the willingness of those who are “vaccine hesitant” to get vaccinated at all , 62% vs. only 28% of those who are “vaccine eager.”
- [FiveThirtyEight Politics podcast](#) looks at “good” and “bad” polls around the J&J vaccine news - in which they categorize our Axios-Harris Poll as a “good” poll.

How the Johnson & Johnson vaccine news negatively impacted public opinion

Poll of 1,845 U.S. adults, April 16-18, 2021



Implication:

The announcement reinforced existing hesitation in those with already existing concerns in vaccine safety - the audience we most need to earn the trust of in order to end the COVID-19 pandemic here in America.

Section:

03

Topic:

SUMMER, SUMMER, SUMMERTIME

Introduction:

What's better than a summer vacation? After more than a year of COVID social distancing and the [CDC updating travel guidelines for fully vaccinated people](#), the answer is probably not much. Here's what Americans are thinking as we get closer to being able to [travel during the summer](#):

- When thinking about traveling out of town now, one quarter (26%) of Americans say they are **ready to go**. This includes 31% of Millennials and 28% of Parents. However, 29% say they are **cautious but optimistic**.
- **Reconnecting with friends and family** (19%) is what most are looking forward to when traveling this summer, especially Boomers (24%). While Millennials are most excited for **rest and relaxation** (20%).
- Half (52%) expect that they will **continue to have flexibility, like remote school or work, throughout the fall** - especially Millennials (60%). **Gen Z does not feel the same with one third (33%)** saying they don't expect to have the same flexibility.
- One in five (20%) of Americans **aren't facing any kind of barrier to travel this summer**, but **personal financial concerns for Millennials** (28%) and **being able to take off from work** for Hispanic Americans (20%) are potential roadblocks.

Implication:

Americans remain cautiously optimistic for a (mostly) normal summer and the start of the "roaring 21s" - the two items Americans are most looking forward to purchasing after things return to normal? Plane tickets and hotel stays.

Section:

04

Topic:

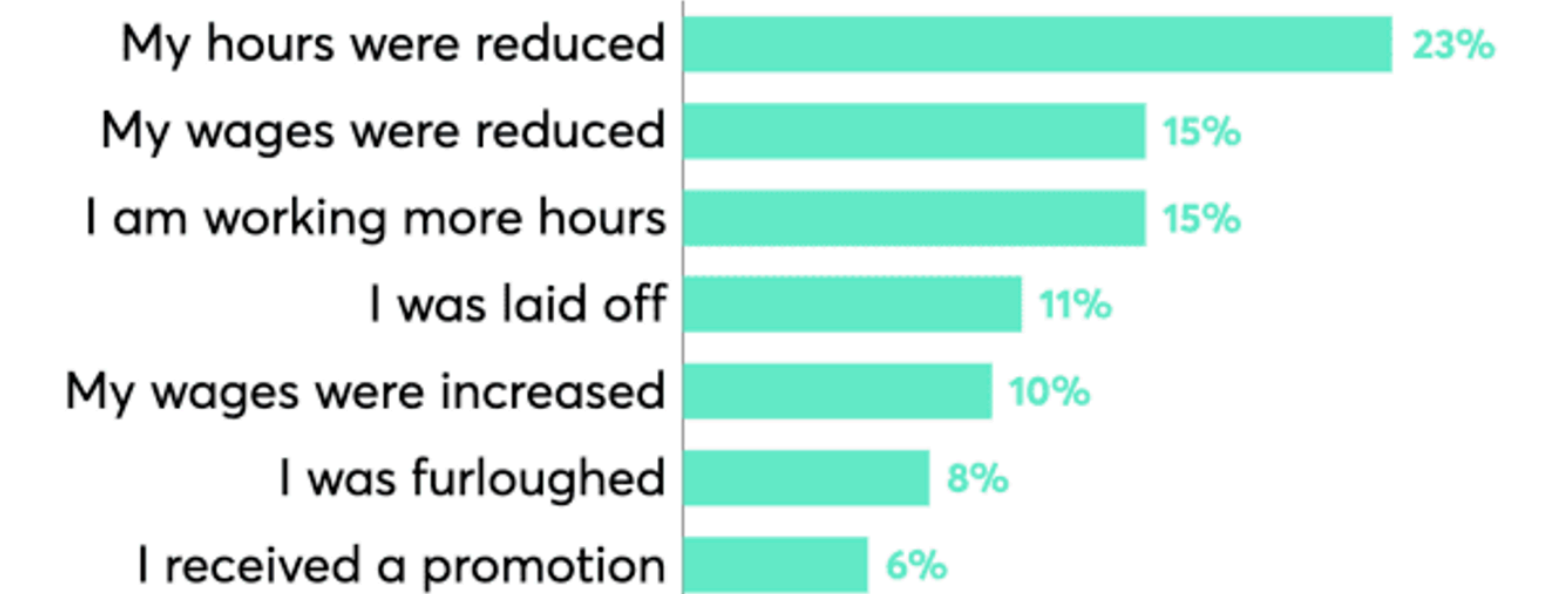
OLDER MILLENNIALS FACE THEIR SECOND EMPLOYMENT CRISIS: CNBC-HARRIS POLL

Introduction:

This week in our partnership series with CNBC on “Middle-Aged Millennials”, we look at how the pandemic is impacting Older Millennials’ careers. [Here is what we found:](#)

- Six in ten (59%) Older Millennials **already have had their income impacted by the pandemic** and their career paths could be shaken up even more following a second once-in-a-lifetime economic downturn.
- How they were impacted: A quarter (23%) had their **hours reduced**, 15% had their **wages reduced** or are **working more hours**, and 11% were laid off.
- However, **education level plays a role**. Nearly half (47%) of those with a bachelor’s degree say they **were recently promoted in the last year** compared with 26% of those without a bachelor’s degree.

Have you experienced any of the following in the last year due to the Covid pandemic?



Note: Respondents were able to select more than one option.

Source: Survey of 1,000 U.S. adults ages 33 to 40 conducted from February 12 to 15, 2021.

Implication:

Many Older Millennials started their careers during the Great Recession that gave them limited career opportunities to pay off their surging student loans, let alone save for other financial milestones. Now as many enter management roles and likely more comfortable salaries, they are facing a second employment setback before they are even over the hill.

Section:

05

Topic:

FAST FOOD BRANDS HAVE A LOT TO GAIN FROM REDUCING SINGLE-USE PACKAGING WASTE: ADWEEK-HARRIS POLL

Introduction:

As a follow up to the [Earth Day brand buzz](#) last week, we partnered with Adweek on a survey to gauge consumer sentiment on proposed solutions to one small piece of humankind's impact on the climate: [littering and pollution from single-use fast food containers](#).

- Most consumers (60%) said knowing that a quick-service restaurant (QSR) was polluting or contributing to litter in public spaces **would lower their opinion of the brand** and 57% said **they'd be less likely to buy from it**.
- Brands also have a lot to gain from improving their contributions to packaging-related waste: 55% of respondents said **they'd have a better opinion of a brand that phased out [polystyrene containers](#)**.
- Most consumers (55%) said they'd be **willing to consider a reusable or returnable container program** to address packaging waste at QSRs. Millennials and Gen Z are the most willing (77%).

- Around half of consumers said that a discount would help incentivize programs to reduce waste, but knowing there was an impact on waste reduction and resource conservation is a motivator for 60%.

Implication:

[Climate change is a top concern for Americans](#) and brands looking to bolster their image with core constituencies such as younger Americans will need to convey they take their responsibility to the environment seriously.



WAVE 55

WAVE 55 INTRODUCTION

The following research was conducted between **April 16-18, 2021** by The Harris Poll. Fielded among a nationally representative sample of **2,024** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

WILL THE NEW CDC TRAVEL GUIDELINES INCENTIVIZE VACCINATIONS? MAYBE

Introduction:

Given the new CDC travel guidelines allowing more freedom for vaccinated people, we took the pulse to see how this impacts vaccine likelihood.

- **Unvaccinated choose quarantine over needles:** Surprisingly, only a little over a third of unvaccinated Americans (35%) say skipping mandatory quarantine and COVID testing while traveling domestically is a driver to get vaccinated.
- **Fence-sitters are more easily persuaded:** However, nearly half (45%) of those who consider their vaccination plan to be “whenever I get around to it” report that knowing they can travel within the US without testing or quarantining makes them more likely to want to get the vaccine.
- **Required vaccine passports could be the tipping point:** 41% of Americans say they are more likely to get the vaccination if this becomes a requirement for traveling domestically, and 32% internationally. Millennials are significantly more likely compared to Boomers both domestically (49% vs. 28%) and internationally (45% vs. 19%).

Implication:

As of now, lifting testing and quarantine requirements for travel are not overwhelmingly compelling reasons for Americans to want to get vaccinated any more than they already do, but the narrative could change if it becomes a requirement.

Section:

02

Topic:

OLDER MILLENNIALS DON'T HAVE AS MUCH WEALTH AS THEIR PARENTS DID AT THE SAME AGE, BUT THEY'RE CATCHING UP: CNBC-HARRIS POLL

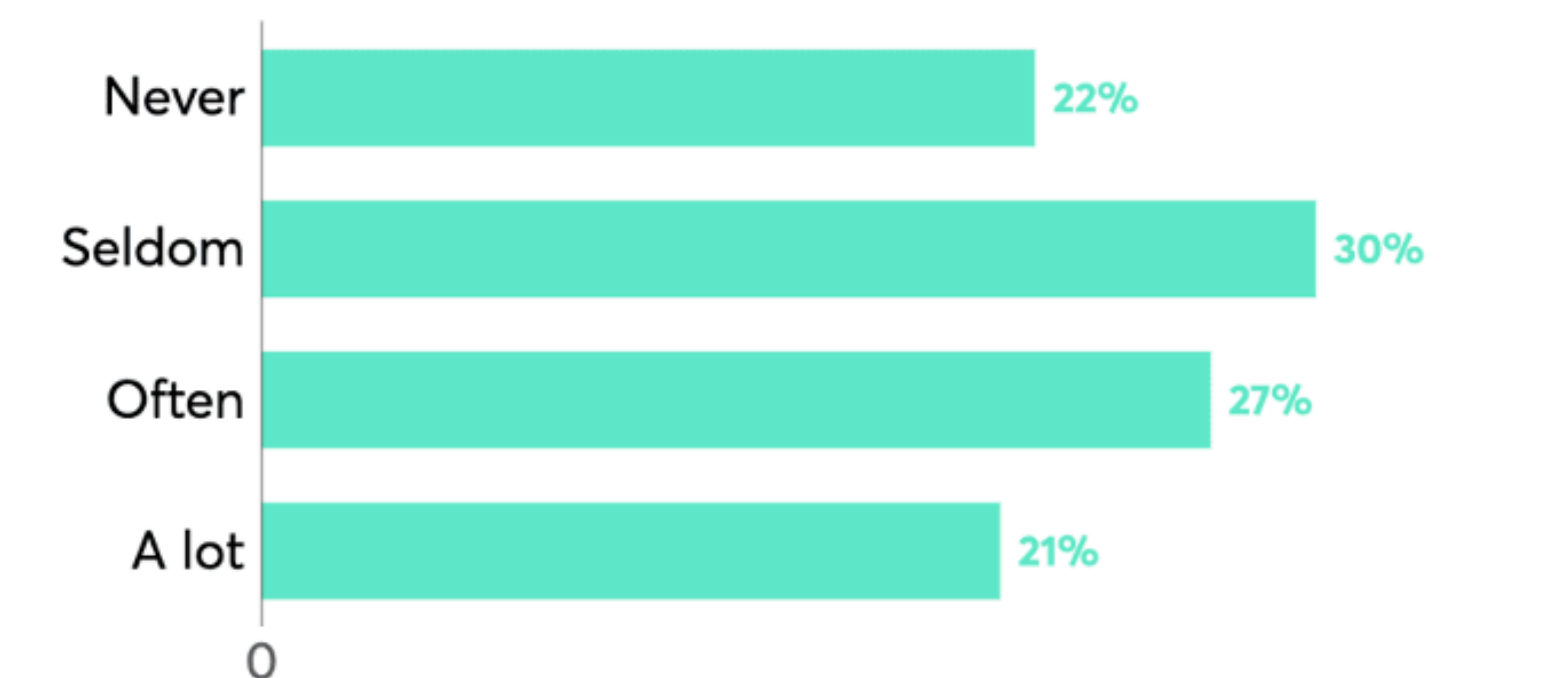
Introduction:

This week in our partnership series with CNBC on "Middle-Aged Millennials," we look at how Older Millennials compare to their parents when they were the same age, where they are lacking, and how they are working towards closing the gap.

[Here is what we found:](#)

- **They aren't just buying avocado toast:** More than half (59%) of Middle-Aged Millennials (Ages 33-40) are homeowners. But, two-thirds (68%) also report having outstanding student loans.
- Nearly a third (29%) of older millennials say they **have a lot of disposable income** left in their budgets at the end of each month - accounting for paying for expenses like housing, car payments, utilities, and food.
- **Not all Older Millennials are all living paycheck-to-paycheck:** while half (52%) say they have escaped the dreaded cycle, 48% say they are often or a lot of the time doing so.

Would you say you are living "paycheck to paycheck" (i.e., you run out of money before your next paycheck)...



Source: Survey of 1,000 U.S. adults ages 33 to 40 conducted from February 12 to 15, 2021.

make it | The Harris Poll

Implication:

Five years ago, Older Millennials were 40% poorer than previous generations were at the same stage of life. That wealth gap has shrunk in recent years, but it's still too soon to tell if obstacles such as student loan debt burdens, rising living expenses and the effects of the COVID pandemic will push this generation permanently off course.

Section:

03

Topic:

YOUR GUIDE TO AUTONOMOUS VEHICLES: MORNING BREW-HARRIS POLL

Introduction:

There currently aren't any self-driving vehicles available for purchase in any part of the world, but what if there were? A deeper look into what Americans think about autonomous vehicles [in our poll with Morning Brew](#):

- **Safety first:** Nearly half (48%) of Americans said they'd feel "at least somewhat safe" in the passenger seat of a self-driving vehicle, but that number jumps to 59% if they were in the driver's seat.
- Two-fifths (41%) of Americans said they'd **prefer to buy a self-driving vehicle from Tesla**, over double the share who'd prefer to buy from a legacy automaker.
- **If you're not driving, enjoy the view:** The majority of nearly every demographic said they would look out the window and observe surroundings if they no longer had to drive, with 59% of 65+ saying so. The outliers are 18-34-year-olds who would most likely eat or drink (32%) with their newly freed hands.

What are you most excited to do in a vehicle once you no longer have to drive it?

Among respondents who are somewhat or very likely to ride in an AV

| | Male | Female | 18-34 | 35-44 | 45-54 | 55-64 | 65+ |
|--|------|--------|-------|-------|-------|-------|-----|
| Look out the window and observe the surroundings | 34% | 48% | 24% | 35% | 50% | 55% | 59% |
| Read or watch something | 19% | 21% | 20% | 28% | 19% | 12% | 17% |
| Eat or drink | 22% | 13% | 32% | 15% | 5% | 10% | 9% |
| Work | 14% | 6% | 10% | 13% | 10% | 14% | 3% |
| Sleep | 9% | 11% | 13% | 8% | 14% | 8% | 4% |
| Other | 2% | 1% | 1% | 0% | 1% | 1% | 8% |

Table: Dan McCarthy • Source: Morning Brew-Harris Poll, March 2021, n=1052 US adults • [Get the data](#) • Created with [Datawrapper](#)

Implication:

Although not a reality (yet), it's hard to deny that AVs are an intriguing technology that we could potentially see in our lifetime.

Section:

04

Topic:

YOUNGER CONSUMERS ARE PAYING ATTENTION TO EARTH DAY CAMPAIGNS—BUT DON'T WANT TO BE SHAMED: AD WEEK-HARRIS POLL

Introduction:

[A new Adweek-Harris Poll survey](#) found that consumers responded better to messages of positivity and action. We partnered together to gauge sentiment around past Earth Day campaigns—which ones led consumers to buy, what's been most memorable, and how different strategies change consumers' perception of brands.

- **Go green, or don't:** Overall, consumers don't feel strongly about whether brands chime in on sustainability issues around Earth Day - only 20% said that it's important for brands to advertise the holiday. Only 37% said it's important that brands make environmentally conscious decisions.

- **But when broken down by generation, the picture shifts.** Older consumers are more likely to say they're trying to make environmentally conscious decisions each day – 47% of Boomers versus 40% of Gen Zers and 37% of Millennials.
- Over half (55%) of respondents said **they'd be more likely to buy from a brand that highlighted preventative measures** like recycling or prioritizing eco-friendly options in their Earth Day advertising, while just 41% said they'd be motivated by an ad that focused on the negative impacts of human behavior on the environment.

Implication:

In the end, consumers want to be motivated, and not shamed, into being eco-friendly.

Section:

05

Topic:

CRYPTO FANS ARE REVOLUTIONIZING ONLINE INVESTING: THE BOSTON GLOBE- HARRIS POLL

Introduction:

Harris Poll CEO Will Johnson [writes in The Boston Globe](#) how nothing seems too risky for more and more of us when it comes to online investing. The trend lines are strong enough to suggest that if this is a fad, it's unlikely to end soon. Here's what he found in a new survey:

- **Crypto is gaining traction:** 16% of American adults today have money in cryptocurrencies such as bitcoin and Ethereum; 14% own meme or viral stocks such as GameStop; and 11% have purchased one-of-a-kind digital assets known as non-fungible tokens (NFTs).
- Roughly half of adults investing in cryptocurrencies, meme stocks, and tokens that certify ownership of digital collectibles like celebrity-issued art or video clips **say they began their purchases in just the last six months**, following the lead of Gen Z, who discovered these markets **seven to 12 months ago**.
- **Who else is interested?** A quarter of Black Americans and 15% of Hispanics say they've bought NFTs, versus 8% of white Americans. Minority adults are also much more likely to think that meme stocks and other unconventional assets **will remain valuable in the long term**.

Implication:

Before you swap your Bitcoin or GameStop shares for an index fund or annuities, you might also want to think about this: when that financial adviser was shooing people away from cryptocurrencies in 2019, bitcoin was going for \$4,000. Today it's worth \$59,900.



WAVE 54

WAVE 54 INTRODUCTION

The following research was conducted between **April 9-11, 2021** by The Harris Poll. Fielded among a nationally representative sample of **1,963** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

CAN BUSINESSES REQUIRE PROOF OF VACCINATION? EXPERTS SAY YES: CBS-HARRIS POLL

Introduction:

As companies rush to develop so-called "vaccine passports" and as access to COVID-19 vaccines expands, the debate about whether businesses can require proof of vaccination from employees and patrons is heating up. [We teamed up with CBS to gauge Americans' perception of vaccine passports](#), and here's what we found:

- **Awareness is on the rise:** When first asked about vaccine passports in early March only 39% reported some level of awareness. Now, just over a month later, that metric has grown to 59%.
- **But there is still confusion** when it comes to what qualifies as valid or sufficient proof of vaccination for your passport. 51% correctly assumed that you need proof of vaccination meaning it's been two weeks since your last dose but 51% also said that just proving you've had your final dose was sufficient.
- **Americans support vaccine passports overall:** More than half support the need to show proof of vaccination for flying on a plane (68%) and even going to work (57%), but only 46% think it's necessary to enter a store.
- **However, privacy concerns still exist:** Even with the rise in support of vaccine passports, we cannot forget that we live in the digital age and privacy concerns are top of mind for many. Three in five (60%) report that they are concerned of the potential threat for patient privacy violation since digital apps will need to access a person's health record.

Implication:

There are tensions stirring regarding proof of vaccination and there are nuances in consumer support for vaccine passports across activities, meaning adoption won't be universal across categories, companies must listen and cater to consumer safety preferences and privacy concerns when it comes to re-opening.

Section:

02

Topic:

IN THE COVID-19 VACCINE PUSH, NO ONE IS SPEAKING GEN Z'S LANGUAGE: STAT-HARRIS POLL

Introduction:

Useful COVID-19 information isn't reaching the Instagram generation and the lack of information is clearly having an impact. And even the limited efforts to reach them where they are — like Instagram's links to its "COVID-19 information center" — aren't working. [Here's what we found in our study with STAT News:](#)

- **Waiting game:** 21% of Generation Z — defined as young adults aged 18 to 24 — said they would **not get vaccinated** against Covid-19 and another 34% said they would "**wait awhile and see**" before getting vaccinated.
- More than half of Gen Zers (57%) don't think their peers are taking strict COVID restrictions compared to just 18% of Boomers (age 57+).
- One fifth of younger generations, Gen Z (20%) and Millennials (21%), report that they know **many people that have gone to informal gatherings with 20 or more guests** - double the amount reported by Boomers (10%).

Implication:

The latest rise in COVID cases in many areas is being fueled in [part by younger Americans](#). Reaching and convincing this generation - many of whom may reason they are not particularly at risk for severe illness from COVID and don't need the vaccine - will require a different approach than older Americans.

Section:

03

Topic:

FOR MANY OLDER MILLENNIALS, STUDENT LOAN DEBT DELAYED BUYING HOMES, STARTING FAMILIES AND PURSUING CREATIVE CAREERS: CNBC-HARRIS POLL

Introduction:

This week in our partnership series with CNBC “Middle-Aged Millennials”, we look at how [the impact of student loans](#) are holding many Millennials back as they transition to adulthood. Here is what we found:

- **Student loan crisis:** About 45 million Americans carry some student loan debt. Among older millennials who attended at least some college, nearly 4 in 5 took on some type of debt to finance their higher education, **borrowing an average of \$21,880**.
- **An end in sight?:** About 68% of older millennials, those born between 1981 and 1988, are still working to pay off their student loans. Some are closer to pay-off than others: about 11% report having paid off nearly all of their loans while nearly 40% have over half of their total balance still left.
- **Effects of monthly student loan payments are far-reaching:** Roughly a quarter of older millennials say student loans affected their ability to buy a home (27%), as well as save for emergencies and retirement (24%). Nearly one in five (17%) said they had to live with family or friends because they couldn’t afford their own rent and student loan payments.

Did your student loans impact your life in any of the following ways?



Source: Survey of 1,000 U.S. adults ages 33 to 40 conducted from February 12 to 15, 2021.

Section:

03

Implication:

Older millennials are inching their way to 40 and approaching a difficult financial time where they are faced with saving for their futures and saving for their children, with the added stress of student loan debt. The silver lining? This cohort is pioneering the path to being financially savvy and literate on their own terms.

Section:

04

Topic:

HOW VW'S POLARIZING 'VOLTSWAGEN' PRANK WENT OVER WITH EVERYDAY CONSUMERS: AD AGE-HARRIS POLL

Introduction:

Despite a wave of negative headlines about its April Fools' Day prank, Volkswagen is not any worse off with everyday consumers - but the automaker also did not help itself by pretending to rename itself "Volkswagen," [according to our new poll with Ad Age](#).

- **The saga went unnoticed by a majority of consumers**, which found that only 21% of consumers had heard about the "Volkswagen" announcement by the time they were polled. Of those who heard of the news, 73% said they were aware that it was an April Fools' joke (perhaps because the poll was conducted after reports came out that it was a stunt).
- Six in ten (59%) of consumers who were aware of the stunt said **it did not change their opinion of the brand**. Just (20%) think better of Volkswagen, while (21%) said they now hold a worse opinion of the brand.

- **But younger people are apparently more into the jokes:** 64% of millennials and 61% of Gen Zers say brands should partake in April Fools' Day, but only 38% of Gen Xers and 35% of Boomers agree.

Implication:

"Holiday promotions can be a powerful and effective tool for brands to engage with customers and build buzz, but not all holidays are created equally," said Will Johnson, CEO of The Harris Poll. "April Fools' Day is polarizing because it gets at the heart of the brand-customer relationship—trust. As our research shows, consumers are divided on April Fools' Day marketing stunts, so brands must carefully weigh the benefits against the risks."

Section:

05

Topic:

PRICE AND SAFETY CONCERNS WILL ENDURE POST-PANDEMIC: INSTACART-HARRIS POLL

Introduction:

Not all companies felt negative effects of the pandemic - take Instacart for example. But now that states are opening up and Americans want to get back to shopping, what will that mean for the companies that thrived during the pandemic and what does the future of shopping look like? [Here's what we found in our poll with Instacart:](#)

- **The pandemic has changed consumer behaviors:** 51% of Americans are making sure they have extra hand sanitizer, hand soap, or disinfectant wipes and 39% said they don't want to run out of essentials like batteries, toilet paper, and paper towels.
- **Price is also top of mind for consumers**, with 36% saying that they've learned how to save money on groceries in the past year.
- Additional 2021 trends we identified include **an emphasis on health and wellness**, with 36% of respondents saying they plan to keep focusing on eating healthier food now that they have learned new shopping habits and how to cook in the past year.

Implication:

America will soon (hopefully) return to normal after the crisis period of the pandemic ends, and companies that saw a boom during the pandemic will need to translate the lessons of the past year into long-term value for consumers. Many innovations that became integral to life amid COVID, such as online grocery delivery, will stick around as consumers prioritize convenience and digitalization.



WAVE 53

WAVE 53 INTRODUCTION

The following research was conducted between **April 2-4, 2021** by The Harris Poll. Fielded among a nationally representative sample of **1,943** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

VACCINE ACCEPTANCE IS AT ITS HIGHEST YET

Introduction:

For the last year, we have tracked many sentiments surrounding COVID-19, but perhaps the metric with the most observation is Americans' acceptance and likelihood for inoculation. As we continue into our 58th week of tracking, vaccine acceptance continues to rise and we see just how far Americans are willing to go to get the jab.

- **A new high:** Today, nearly eight in ten (77%) say they are very or somewhat likely to get the COVID-19 vaccine as soon as it becomes available to them. This is the highest acceptance rating seen so far, with acceptance being as low as 68% at the end of February.
- **Acceptance grows but not universally:** For months we have seen vaccine likelihood slowly rise but it has been uneven across demographics, today Black Americans are still more unlikely to get the vaccine than White Americans (33% vs. 23%, respectively) a consistent trend we have seen since we started tracking the sentiment.
- **The road to normalcy:** Four in ten (41%) Americans willing to get the vaccine say they would travel outside of their home county for an appointment, with 69% willing to travel between 10-49 miles. If given the choice, half (51%) would opt to get the vaccine at their primary care doctor's office.
- **Not out of the woods yet:** [As featured in Axios](#), Americans are still worried about the spread of new variants and this fear is still dictating what people are comfortable with doing. Three in five (62%) who are uncomfortable traveling in the U.S. say new variants are the reason.

Implication:

With vaccine acceptance on the rise, Americans are inching closer to getting back to normal. Some are even willing to travel to infinity and beyond if it means that they can resume pre-pandemic life.

Section:

02

Topic:

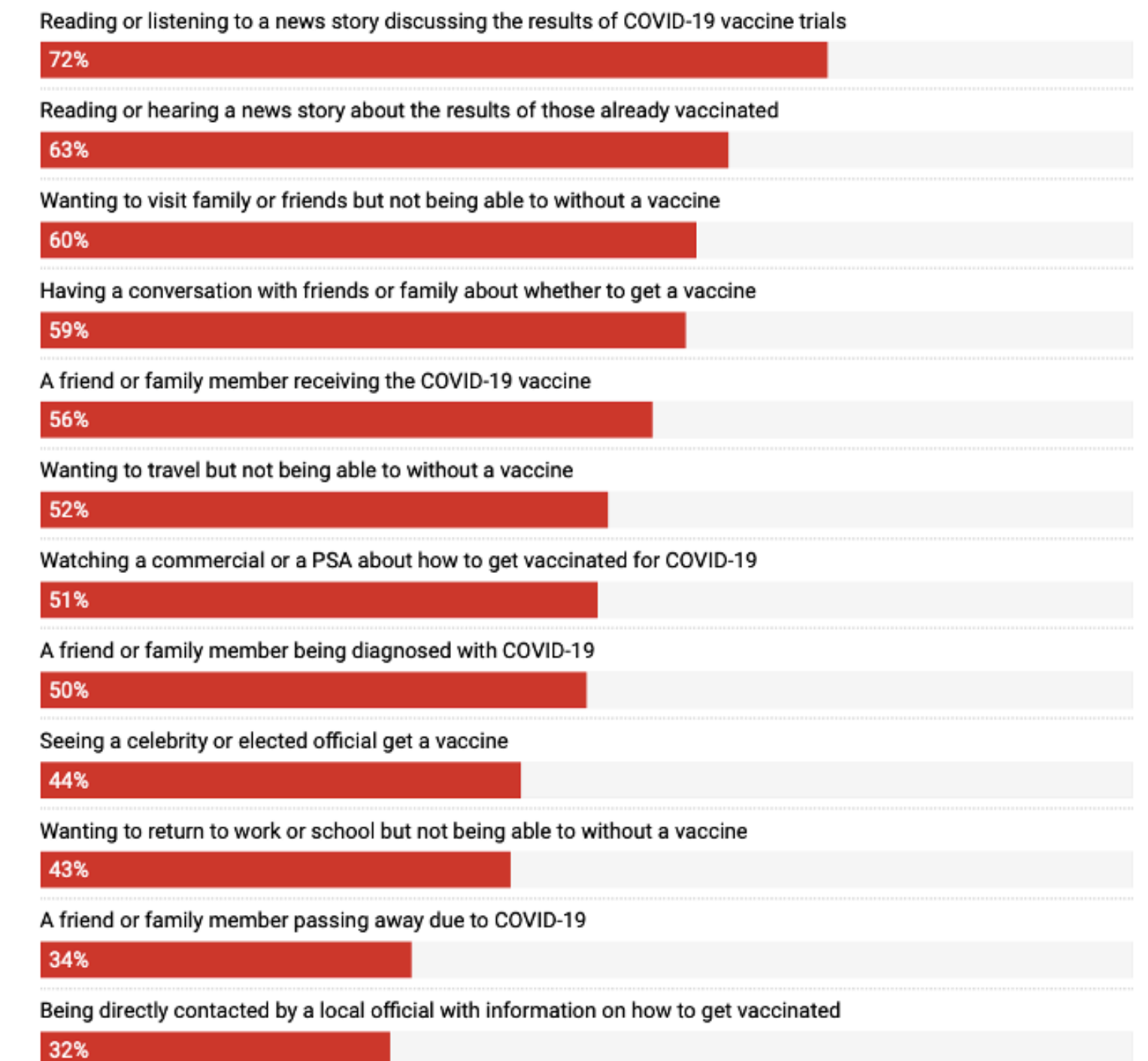
HERE'S WHAT WILL ACTUALLY CONVINCE PEOPLE TO GET VACCINATED: TIME-HARRIS POLL

Introduction:

All Americans over 16 will now be eligible for a COVID-19 vaccine by April 19th. [In a new TIME/Harris Poll](#), we look at what may actually motivate the fence-sitters.

- **Authority figures might not be the most effective messengers:** Of those who had recently been vaccinated, only 32% said they were influenced by a local official reaching out directly via email, phone or mail.
- **Return to Normal:** Much more effective, it seems, are appeals to people's individual needs and desires - half (52%) said they got the vaccine because they wanted to travel.
- The people around us also play a major role, with 56% of respondents saying they got vaccinated after a friend or family member did, and 59% saying they were influenced merely by having a conversation with such a closely connected person.
- **Despite our ostensible mistrust in the media**, 63% said they were influenced by news reports about people who had already been vaccinated.

Vaccinated Americans who say they were influenced by...



Harris Poll survey fielded among a nationally representative sample of 1,038 U.S. adults on March 3. Results reflect 273 respondents who had already been vaccinated.

Chart: Emily Barone • Source: TIME-Harris Poll

TIME

Implication:

As TIME notes, past research shows value in appealing to people through personal stories: one study found that one way to earn the trust of people is not for the media to censor accounts of side effects and skepticism but to precede them with real-world data on the minimal risks and the considerable benefits of vaccines.

Section:

03

Topic:

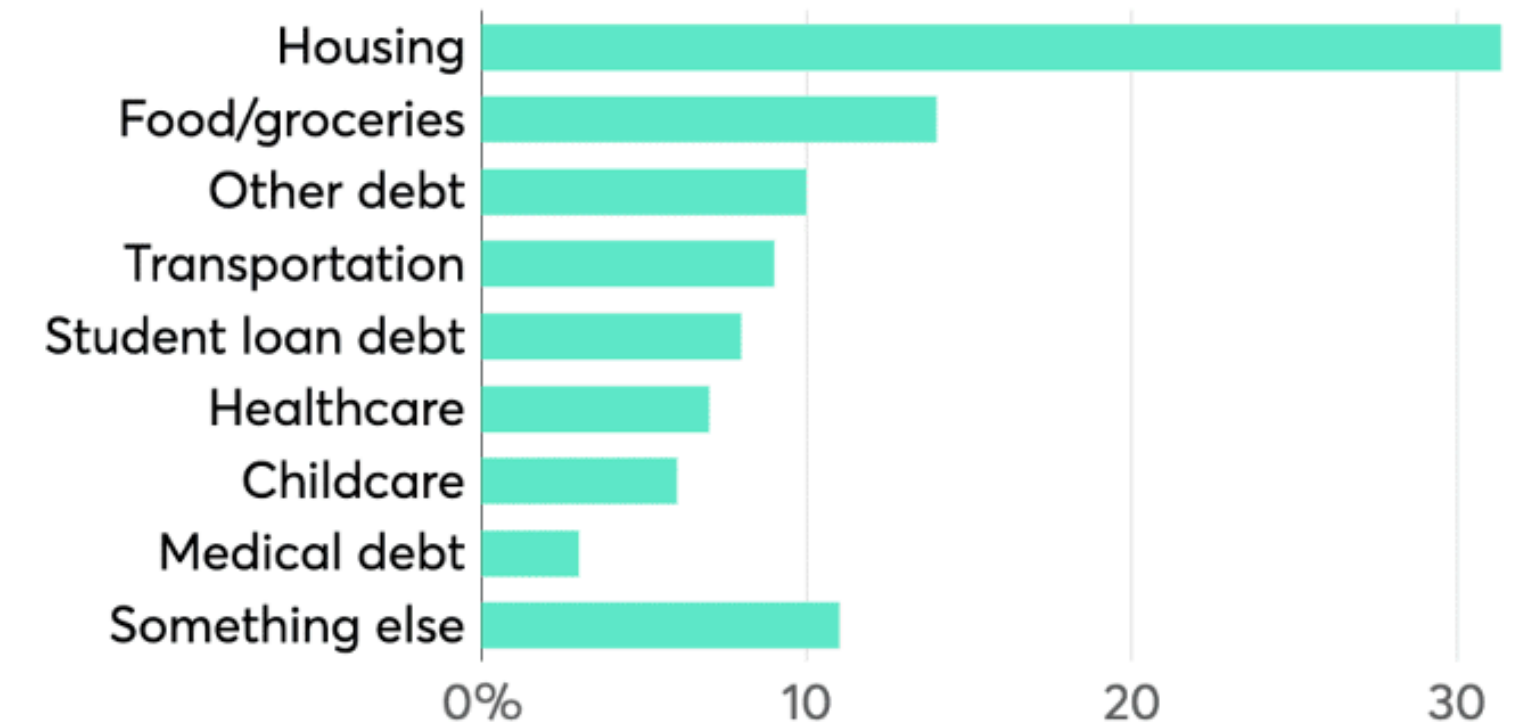
THE OLDER MILLENNIAL BURDEN - FINDING AFFORDABLE HOUSING: CNBC-HARRIS POLL

Introduction:

A continuation from [our story last week](#), Harris Poll and CNBC continue to look at “Middle-Aged Millennials” and one of their biggest hardships: [finding affordable housing](#).

- **About one-third of older millennials**, those born between 1981 and 1989, say that housing is their most burdensome monthly expense, according to a recent survey conducted by the Harris Poll.
- Among both renters and homeowners, the average older millennial spends a **median amount of \$1,200** a month on housing costs.
- **But...** that same cohort only takes home about \$3,200 a month in pay, which means the typical older millennial is **paying more than the recommended 30%** of their income on housing. Many are spending more than 37%.

Which of the following would you say is your most burdensome expense?



Source: Survey of 1,000 U.S. adults ages 33 to 40 conducted from February 12 to 15, 2021.

Implication:

Older Millennials are struggling to find a decent place to live at an affordable price which causes them to be at a higher income-to-housing-cost ratio. Older Millennials are finding it hard to reach other financial goals under the burden of affordable living.

Section:

04

Topic:

MLB FANS ON RULE CHANGES, BALLPARK SAFETY AND ANALYTICS' INFLUENCE ON THE GAME: THE ATHLETIC-HARRIS POLL

Introduction:

With the 2021 MLB season opening last week, [The Harris Poll](#) partnered with [The Athletic](#) to look at what fans' expectations are for a safe game-day outing. Here's what we found:

- **Fans are not expecting a quick return to normal** at the ballpark, despite the hopeful national vaccination progress. Fans are tolerant of temperature checks (85%) and mask-wearing (88%).
- When asked when MLB stadiums would [return to full capacity](#), **73% said either next season or 2023**; 16% said this year, and the remaining 11% said they would never attend a full capacity contest again.
- **Nearly three-quarters of fans supported vaccinated-only sections**, but there is a generational divide as nearly half of Gen-Z respondents said they would be less likely to attend if there are vaccinated sections.

- **Rocky Mountain High:** [In protest over Georgia's new voter law](#), MLB is moving the All-Star Game from Atlanta to Denver.

Implication:

The return of sports is a big step for American culture post-COVID and fans are itching to get back to games. Although it may not be convenient, fans are willing to take the extra step to see a live game with other people in the stadium.

Section:

05

Topic:

DON'T GET NFTS? DON'T WORRY, NEITHER DO MOST AMERICANS: BLOOMBERG- HARRIS POLL

Introduction:

We teamed up with Bloomberg to take a look at the latest cryptocurrency trend - non-fungible tokens (NFTs). [Here's what we found:](#)

- **Only 27% of Americans** say they are very or somewhat familiar with NFTs. Men, millennials and the wealthy appeared more aware.
- Even when reading a description of NFTs, **most people remained confused**. Only 30% said they understood how NFTs work while 70% said that even after an explanation, they still didn't really get them very well or at all.
- **Americans did express some willingness to buy NFTs**. A full 42% said they saw NFTs as a legitimate form of art collection. However, don't expect them to shell out as much as recent collectors have for the digital collectibles. [Last week, Twitter founder Jack Dorsey sold his first-ever tweet for \\$2.9 million.](#)

Implication:

Some say NFTs are the latest fad and while we have yet to see what the future brings, it is clear that most Americans do not understand exactly what they are. NFTs are a niche in the crypto world still but that doesn't mean some people aren't willing to pay more than their fair share for one.



WAVE 52

WAVE 52 INTRODUCTION

The following research was conducted between **March 26-28, 2021** 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:

COVID OUTLOOK - A TRENDED UPDATE

Introduction:

American outlook on COVID is becoming more optimistic with 62% saying “the worst of COVID is behind us” today (vs. 33% on December 30, 2020). Here’s what else is shifting across our year’s-worth of survey tracking data:

- **Approval of the vaccine roll out** is at an all-time high of 74% up from 52% when we first started tracking this sentiment on January 10th, as is **likelihood to take the vaccine** (75%) up from the lowest point of 54% on October 24, 2020.
- **Fear returning to public activity is down** 5 percentage points this week to 65%, marking a gradual decline since an all-time high of 76% on July 19, 2020. **Meanwhile the desire to return to normal is on the rise:** 50% miss traveling on an airplane (up from 24% on March 30, 2020).
- While optimism is rising, roughly 25% to 30% would **wait until the nation reaches herd immunity** to return to once normal activities such as eating indoors (23%), traveling on an airplane (27%), and attending a concert/ sporting event (32%) as featured in [USA Today](#).

Implication:

“The vaccine is certainly a game changer for getting back to doing the things we love, said John Gerzema, CEO of The Harris Poll. “But while it’s important that we each get our own shots, a significant number of Americans are patiently waiting for their friends and neighbors to get vaccinated before we truly see a return to normal.”

Section:

02

Topic:

THE ATLANTA MASS SHOOTINGS...WE SAW THIS COMING

Introduction:

For the past year, The Harris Poll has been tracking awareness and concern about the surge in hate crimes against Asian Americans, and today our data finally shows a shift in public awareness and concern.

- Over two thirds (67%) of the public and 74% of Asian Americans believe that the Atlanta shootings were a **turning point** in the conversation around discrimination towards Asian Americans.
- **Rise in Concern:** Last year, less than 6 in 10 (59%) of Americans were concerned about the hate towards Asian Americans related to the pandemic. Now, over three quarters (76%) are concerned, including 82% of Asian Americans.
- **A Community in Pain:** Nearly 7 in 10 Asian Americans (69%) are worried about their family being physically or verbally attacked due to the anti-Asian hate and nearly 3 in 10 (29%) mentioned they would be less vocal because of fear.
- **A Community That Will Not be Silenced:** Two-thirds (64%) of Asian Americans said the recent attacks have made them want to become more vocal against racism and 65% stated they needed to organize protests to bring more awareness to these injustices to racial minorities. Last weekend the AAPI community along with Americans of all races and colors participated in [rallies](#) across the U.S. to condemn attacks against Asian Americans and Pacific Islanders.

- [In a separate poll we conducted with the National Asian Pacific American Women's Forum \(NAPAWF\)](#), we look at details how Asian American/Pacific Islander (AAPI) women have been significantly affected by anti-Asian racism and xenophobia in the United States in a survey conducted before the tragedy in Atlanta.

Implication:

We will be looking deeper into this divide in our nation as part of our #wassthehate series in the COVID-19 Tracker.

Section:

03

Topic:

MEET THE MIDDLE-AGED MILLENNIAL: HOMEOWNER, DEBT-BURDENED AND TURNING 40: CNBC-HARRIS POLL

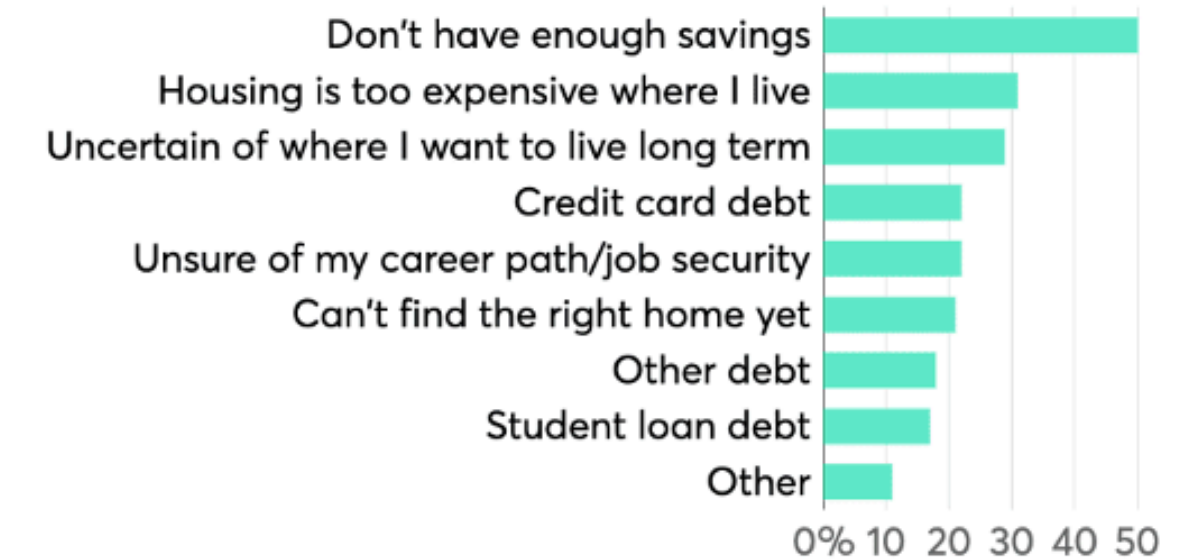
Introduction:

We teamed up with CNBC Make It to launch “Middle-Aged Millennials,” to explore how the oldest members of this generation have grown into adulthood amidst the backdrop of the Great Recession and the COVID-19 pandemic, student loans, stagnant wages, and rising costs of living. In the first part of this series, we look at homeownership among this age cohort:

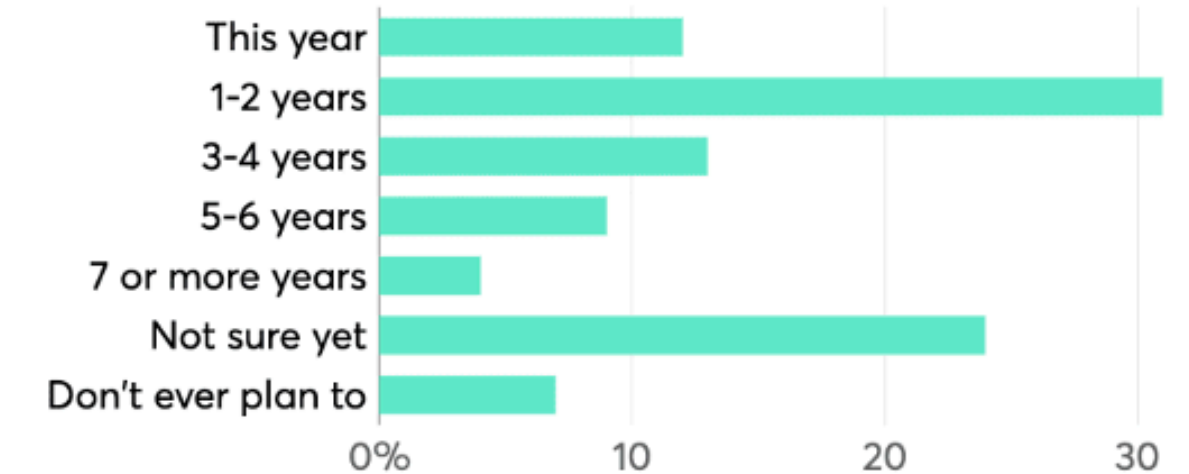
- **Homeownership didn't come easily:** Many Older Millennials had to get creative when paying for their home. About 10% took out a loan from their retirement accounts, while roughly 20% used a credit card to help. Nearly 1 in 5 also received help from their parents or other family members.
- Although most Older Millennials have managed to become homeowners, 28% still rent and 12% are living with their parents or other family members. Homeownership rates among Black and Hispanic Older Millennials lag their White counterparts, as do rates among those without a college degree.

- Debt has been a key factor hindering homeownership: 17% of older millennials who don't own a home say **student loans present a barrier** to homeownership. And half of older millennials say they're not homeowners because they don't have enough saved.

Which of the following are current barriers for you to own your own home?



When are you looking to buy a home?



Note: Out of respondents who said they don't own their home. Respondents were able to select more than one barrier.

Source: Survey of 1,000 U.S. adults ages 33 to 40 conducted from February 12 to 15, 2021.

Implication:

“When it comes to achieving homeownership, older millennials were just scrappy and very resourceful,” says Harris Poll CEO John Gerzema.

Section:

04

Topic:

SHOULD BRANDS BE ENCOURAGING COVID-19 VACCINATIONS? MOST CONSUMERS THINK YES: ADWEEK-HARRIS POLL

Introduction:

[In a new Harris Poll/Adweek survey](#), we looked at the role brands can play in building confidence in COVID-19 vaccinations and the opportunities it can present for brands:

- **Consumers want brands to speak up:** 60% agreed brands have an “obligation” to encourage people to get vaccinated, while 70% said they support brands sharing factual information about how and where to get vaccines.
- In addition, 62% believe brands have an obligation to **go beyond information dissemination itself to dispel myths** around COVID-19 vaccines.

- **The donut does help:** 70% of consumers think brand [rewards like Krispy Kreme's](#) could work to encourage more vaccinations. And it's not just shots: 60% of respondents said they'd be more likely to buy from a brand that offers promotions to encourage vaccinations.
- **Boomer Opportunity:** While a majority (58%) said they trust brands more than they trust social media when it comes to vaccination information, there is a wide generational divide: 73% of Boomers said they trust brands over social media, compared to 63% of Gen X, 44% of Millennials and 37% of Gen Z.

Implication:

Using brand equity to build confidence in the vaccines could be a brand building opportunity: 42% said a brand sharing information about vaccinations would bolster their views of the brand, while 43% said it wouldn't affect their opinion and just 15% said it would lower their opinion.

Section:

05

Topic:

AMERICANS WILL PREFER IN-PERSON SHOPPING POST-PANDEMIC: MORNING BREW-HARRIS POLL

Introduction:

We teamed up with [Morning Brew to run an exclusive poll](#) on how shopping habits have changed over the last year and found that while many did report a major shift toward digital during the pandemic, it turns out being very online isn't for everyone:

- Over 4 in 10 (43%) said they'll **mostly shop in-person** once COVID restrictions are lifted. Just 24% said they'd mostly shop online, with 33% saying they'd do both equally.
- 77% of respondents are at least somewhat likely to shop at their local mall or department store.
- Less than half (47%) of respondents said they're at least somewhat likely to use **delivery apps** post-pandemic. Though younger people reported a much higher willingness to keep the GrubHub and Uber Eats orders coming.
- More respondents (67%) plan to make big-ticket purchases IRL versus online (54%).

Pandemic-Driven Changes in US Adults' Shopping Behavior

| | Pre-pandemic | During pandemic | Post-pandemic |
|---|--------------|-----------------|---------------|
| Shop in-person or online at a major retailer for everyday purchases | 63% | 55% | 84% |
| Shop in-person at a mall or department store | 61% | 32% | 77% |
| Shop in-person or online at a local/mom-and-pop retailer for everyday purchases | 45% | 37% | 76% |
| Make big-ticket/expensive purchases in-store | 35% | 18% | 67% |
| Order food for delivery directly from a restaurant or ghost kitchen | 30% | 38% | 60% |
| Make big-ticket/expensive purchases online | 23% | 23% | 54% |
| Use food delivery apps | 23% | 31% | 47% |
| Purchase at least some of my groceries online | 22% | 37% | 52% |

Note: "Pre-pandemic" and "During pandemic" columns were select all that apply, "Post-pandemic" shows % at least somewhat likely to do an activity
Source: Morning Brew-Harris Poll, March 2021, n=1078 US adults • Created with Datawrapper

Implication:

It's obvious that e-comm will remain a bigger part of everyday shopping than before. But Americans want to return to the physical realm too.



WAVE 51

WAVE 51 INTRODUCTION

The following research was conducted between **March 19-21, 2021** by The Harris Poll. Fielded among a nationally representative sample of **1,948** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

AD AGE-HARRIS POLL: HOW BRANDS CAN REACH NEW EMERGING POST- LOCKDOWN CONSUMER GROUPS

Introduction:

Not all consumers are planning for the new normal in the same way. While a plurality of Americans is poised to jump-start the economy, others are more cautious. Harris Poll CEO Will Johnson breaks down how brands can cash in on the “Roaring ‘20s” with three emerging consumer groups in a survey [shared exclusively with Ad Age](#).

- **Pent-Up Spenders:** Demographically, they are likely to be Millennials and/or those with robust incomes. In short, **these groups are eager to make up for their lost year**, so marketers should focus on them when pushing new and innovative products.

- **Status Quovians:** This stay-the-course cohort is largely composed of Gen Xers and Boomers as well as those in the middle class. They will be a bit more conservative with their pocketbooks, so **advertisers should emphasize durability and discounts** and stick to the basics with them as they’re not inclined to get adventurous in their shopping.
- **The Pandemic-Shy:** Lower-income households remain the most reserved. They’re going to **need more time to feel comfortable** opening their wallets again. For advertisers, that means less emphasis on new products and more on engaging content.

Implication:

Consumers of all ages and incomes are ready to start spending at some level again. Brands need to take how the pandemic has affected these groups into consideration when advertising and hit these key points to make sure that spring is the new holiday season.

Section:

02

Topic:

POST-PANDEMIC ANXIETY: APA-HARRIS POLL IN CNBC

Introduction:

For the past year, Americans have dreamt of when our lives could go back to “normal.” As we inch closer to this dream becoming a reality, The American Psychological Association and The Harris Poll take a closer look as to [why Americans are anxious about getting back to our pre-pandemic lives](#) and featured in [CNBC](#).

- Nearly half (49%) reported feeling uncomfortable about returning to in-person interactions once the pandemic ends including 48% of vaccinated Americans.
- **The Pandemic as a Wake-Up Call for Personal Health:** as reported in The New York Times, 42% of Americans say they **gained an average of 29 “pandemic pounds,”** increasing their COVID risk.
- Additionally, nearly 1 in 4 (23%) reported drinking more alcohol than usual to cope with pandemic-related stress.

Implication:

Americans have adjusted to isolation and the thought of being surrounded by other people (outside of our bubble) is anxiety-inducing. As The Harris Poll explains, [COVID-19 PTSD](#) is real, and we may feel the side effects of it for a long time.

Section:

03

Topic:

THE BIG FASHION COMEBACK? OAAA-HARRIS POLL IN VOGUE BUSINESS

Introduction:

Since the start of the pandemic, out-of-home (OOH) advertising has gained the attention of consumers looking to get outside, as reported in our research with the Outdoor Advertising Association (OAAA) [and featured this week in Vogue Business](#). The medium has become more interactive and accessible and brands, especially as fashion brands are learning to program their OOH ads to achieve a variety of goals.

- **Fashion is betting big on OOH:** “We’re seeing a 573% increase in commitments from fashion brands and retailers this January and February 2021 compared to the same time last year,” says Chris Gadek, vice president of growth at AdQuick, which sources OOH ad options for Drake’s OVO fashion brand, M.M.LaFleur and The Kooples.
- **Not your grandparents’ billboards:** “Marketers have had to adapt to consumers’ altered schedules,” says Anna Bager, CEO and president of the OAAA. “Eyeballs have shifted from very metropolitan places like Piccadilly Circus in London or Times Square in New York, but that doesn’t mean that they’re not outside; they’re just now somewhere else.”
- **OOH advertising still has clout:** the channel informed more than 25% of US adults of a new brand this past year, while in larger metropolitan areas, 34% said it influenced their purchasing decisions according to our recent study.

- **Dynamic, digital campaigns:** Since the pandemic began, 31% of US adults have used QR codes more and 19% used **augmented reality more**. More than 4 in 10 are also interested in deals available through **contactless tech**, with 45% willing to use tap-to-pay transactions and 41% willing to scan QR codes.

Implication:

“Out is ‘in’ this year,” concludes John Gerzema, chief executive of The Harris Poll. “People are eager to make up for lost time. They’re looking to get back out into the world with a vengeance [and] this makes out-of-home advertising an especially smart buy right now. Brands should meet consumers where they are, which will be anywhere but at home on Zoom.”

Section:

04

Topic:

ASTRAZENECA'S IMPACT ON VACCINE CONFIDENCE

Introduction:

After more than a dozen countries in Europe paused administration of the AstraZeneca COVID-19 vaccine due a possible connection to blood clots, [Europe's regulatory agency reviewed a second time and found the vaccine to be safe](#). How does this impact the public's sentiment towards vaccines in general?

- One in four (40%) Americans who are not vaccinated but plan on it reported being **worried by the news and may even delay their vaccination because of it**. This hesitancy is especially true for Black Americans (51%), Millennials (44%), and Parents (42%).
- More than one-third (36%) say that the news makes them more concerned about other vaccines, but they'll still definitely get the shot. And 24% say it makes no difference to them.
- **Wait and See:** Americans continue to be split between getting the vaccine as soon as it's available to them (27%) and the "wait and see" mentality (23%). Nearly one third (29%) of Gen X Americans are ready to be first in line as soon as the vaccine is available to them compared to just (15%) of Gen Zers.
- [The New York Times looks at](#) how trust in the AstraZeneca vaccine is shaken in Europe following the pause in inoculations. However, trust in the vaccine will likely take another hit as [U.S. health officials raise concerns](#) over how the company might have relied on out-of-date information for their U.S. trial that found the vaccine to be 79% effective.

Implication:

Concern over side effects is the biggest barrier for Americans hesitant to get a COVID-19 vaccine: more than half (55%) of those taking a "wait and see" approach say unknown side effects are their biggest cause of concern. Halting an already approved vaccine, even out of an abundance of caution, could erode trust across the globe for other vaccines rather than build it.

Section:

05

Topic:

MORNING BREW-HARRIS POLL: US ADULTS HAVE MIXED FEELINGS ABOUT SELF-DRIVING VEHICLES

Introduction:

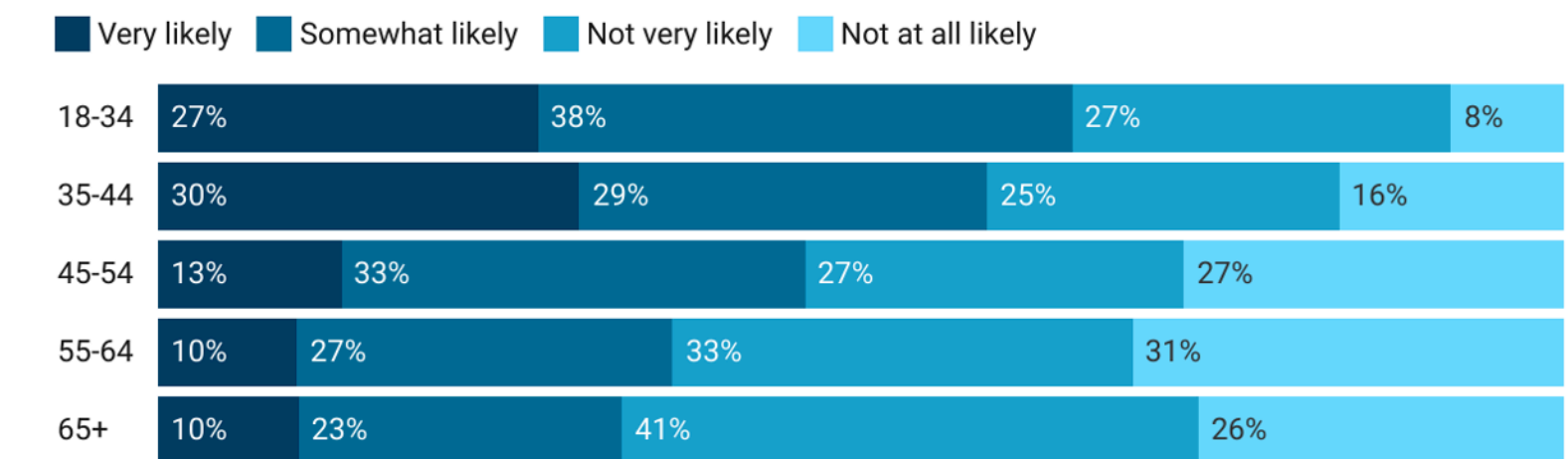
Contrary to popular belief, there currently aren't any self-driving vehicles available for purchase by consumers in any part of the world. [Morning Brew and The Harris Poll](#) look at the hypotheticals if a fully autonomous vehicle were available to the general public.

Backseat drivers: Nearly half (48%) would feel some level of safety being in the passenger seat, while not surprisingly more 59% would find comfort in the driver's seat.

Not my steering, not my problem: If you're not actually driving a vehicle, where does the responsibility lie if an accident were to occur? Three quarters (75%) of Americans would like to understand where the liabilities exist if involved in an accident.

Younger generations are more likely to adopt this new technology compared to their older counterparts. Gen Z (71%) and Millennials (62%) are almost twice as likely to ride as a passenger as Baby Boomers (32%).

How likely would you be to ride in a self-driving vehicle, if available?



Source: Morning Brew-Harris Poll, March 2020, n=1052 US adults • Created with Datawrapper

Implication:

Americans are curious about self-driving cars, and although we aren't able to multitask while commuting to work just yet, there is a [potential market](#) for fully autonomous vehicles.



WAVE 50

WAVE 50 INTRODUCTION

The following research was conducted between **March 12-14, 2021** by The Harris Poll. Fielded among a nationally representative sample of **1,977** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

THE GREAT AWAKENING: A YEAR OF LIFE IN THE PANDEMIC AS DOCUMENTED BY THE HARRIS POLL

Introduction:

Monday we released a special report on a year's worth of The Harris Poll weekly COVID-19 tracker revealing new priorities in how we choose to live our lives, where we want to live and work, and how we choose to spend our time and money.

With over 55 consecutive weeks of consumer research, surveying over 114,000 people, we believe we have stood up the single largest comprehensive data set on life amid COVID-19.

This report examines loss, resilience and emergence. The pandemic is remaking many aspects of American life that we are only now beginning to understand. From values and beliefs to routines and relationships, change is underway across the nation.

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

[Download the report](#)

[Read the press release](#)

Section:

02

Topic:

COVID AND THE AMERICAN CONSUMER: CHEDDAR-HARRIS POLL

Introduction:

This week John Gerzema, CEO of The Harris Poll, spoke to [Cheddar](#) about where the U.S. is after a year of enduring a pandemic and what the future looks like for consumers. Here is what he has to say:

- **A savings dam is about to burst:** Americans are gearing up for a spending free-for-all and consumer confidence continues to grow. Almost one-third (30%) of \$100K+ households report that they expect to spend more than they did last spring. Two-thirds (66%) of Americans who have remained employed throughout the pandemic said that they were able to save more than they otherwise would have.
- **CV-PTSD:** The lingering psychological trauma of the COVID-19 pandemic will inevitably affect the way Americans shop. Nearly half (48%) do not want to use cash anymore and 30% are taking fewer trips to the store and stocking up on as much as they can when they do go.
- **Meet and greet:** The last year made Americans hyper-aware of what they touch and where they put their hands. With that, more than half (54%) say that they would be happy if they never had to shake another person's hand again. Handshakes are so 2019.



Implication:

Americans are ready to ride the digital acceleration wave. With companies finding ways to make in-person shopping an obsolete experience, consumers are ready to spend money.

Section:

03

Topic:

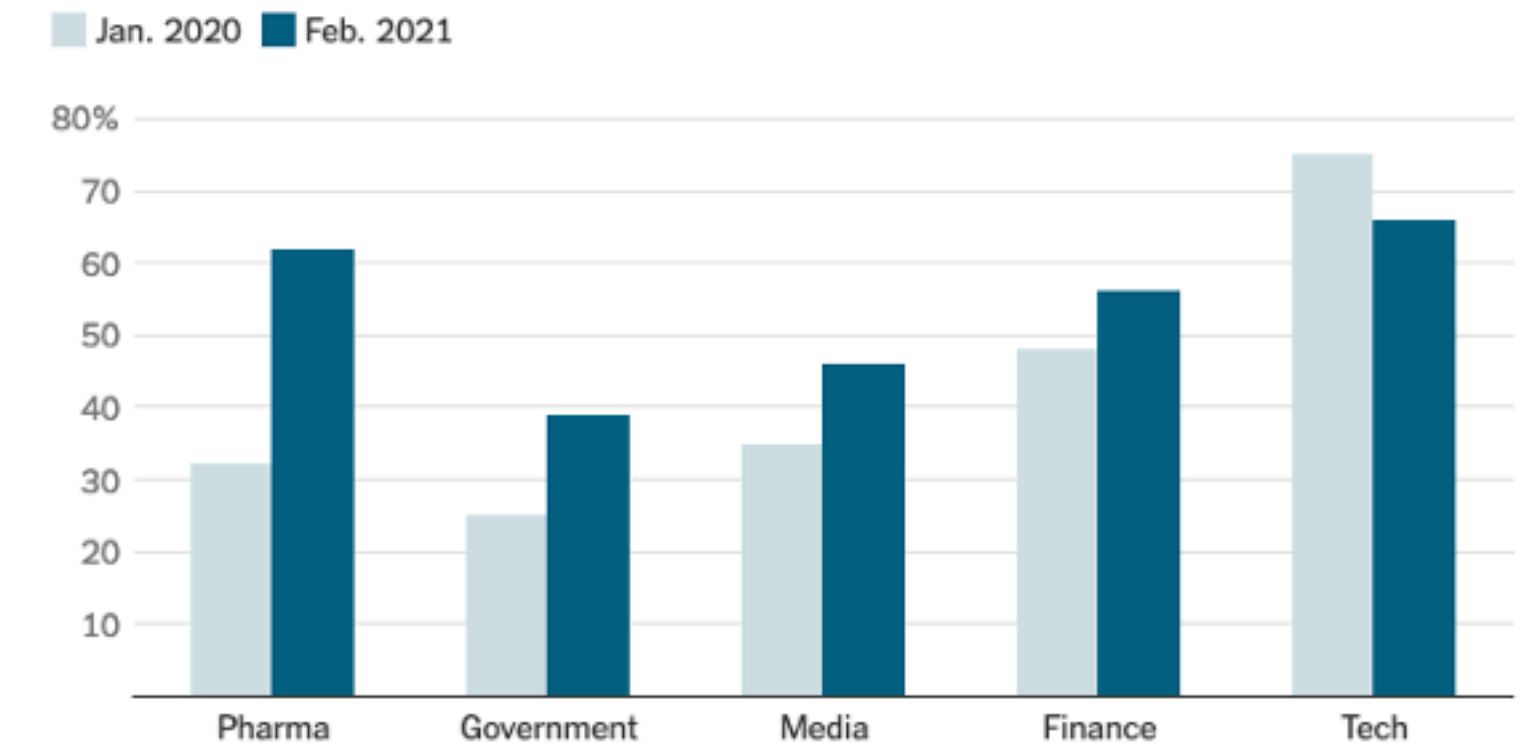
BIG PHARMA'S BOOST: NYTIMES DEALBOOK-HARRIS POLL

Introduction:

At the height of the pandemic, more than half of Americans were afraid of dying from the virus and a similar share were afraid of losing their jobs. Only in the past month, with vaccines rising and hospitalizations and deaths declining, is fear abating. Big Pharma is the unlikely hero of the pandemic, [The New York Times](#) says using Harris Poll data.

- **Tipping the scale:** Approval ratings rose for many industries from January 2020 to February of this year, but the reputation of the pharma industry — stained by its role in the opioid crisis and criticized for high drug prices — benefited the most. In January 2020, only 32% of Americans viewed the industry positively; late last month, that had almost doubled, to 62%.
- **Pharma to the rescue:** And just less than half (44%) of Americans say their opinion of the industry has improved since the start of the pandemic — because of the actions the pharma industry has taken. In fact, on our Essential 100 ranking from June 2020, we asked Americans which companies they viewed as being part of the solution: Johnson & Johnson ranked #3, and Pfizer ranked #8.
- Harris Poll polling partner [STAT News](#) looks at a post-COVID pharmaceutical industry.

Public approval rating of industries



Source: The Harris Poll • The New York Times

Implication:

Stained by its role in the opioid crisis and criticized for high drug prices, the pharmaceutical industry will hope to maintain its strengthened image in a post-COVID world. “The pharmaceutical industry’s ability to innovate and perform under intense pressure and in a time of crisis is the ultimate validation for any business,” adds John Gerzema, CEO of The Harris Poll.

Section:

04

Topic:

WHAT WE LEARNED ABOUT OURSELVES IN LOCKDOWN: AXIOS-HARRIS POLL

Introduction:

Americans learned over the past year that they kind of like working and socializing from home and might keep these parts of their pandemic lifestyles going even after offices, bars and restaurants become options again, according to our data [featured exclusively in Axios](#).

- **Home is here to stay:** Three quarters (75%) of Americans said they learned during the pandemic that they prefer socializing in small groups at home over going out to bars. Three-fifths (59%) said they **didn't miss going out to bars to socialize as much as they thought they would**, and 60% said they've learned over the past year how much they love entertaining at home in small pandemic pods.
- **Americans have also gotten used to working from home:** 67% said their lifestyles have **gotten healthier while working from home**, and 55% said they've discovered that they didn't miss the office as much as they thought they would. Two-fifths (40%) said they'd miss having extra time in the mornings if they have to go back into an office full-time.
- **A different kind of getaway:** Three quarters (74%) of Americans who are working from home said they'd consider taking a "[workcation](#)" - going somewhere else for a while, but working while there.

Implication:

Even after the threat from COVID-19 subsides, we know life won't simply return to what it once was. This year has altered everything from our media diets to our sense of work-life balance to our ideas of what's fun, but through the hardships many have found the silver linings.

Section:

05

Topic:

A LOOK AHEAD

Introduction:

After a catastrophic year in which our lives came to a halt and we lost over 536,000 of our fellow Americans and millions around the world, there's growing confidence that the ending of the crisis phase of the pandemic may be within reach.

- **Pathway to immunization:** Last week, President Biden directed all states to open vaccine eligibility to all U.S. adults by May 1st - **an initiative in which 65% of Americans are confident we will reach.** [Alaska and Mississippi are already there](#), while [Ohio set March 29th as their date](#) for all adults to be eligible.
- **No more summertime sadness:** Following the May 1st goal, 60% are confident that we will "return to normal" by the summer - **a 15-pt increase** from just three weeks ago on February 21st. Three-fourths (75%) of Americans are optimistic that we will have all Americans who want the vaccinated inoculated by summertime.
- The Atlantic looks at "[a quite possibly wonderful summer](#)" in which the pandemic may feel like it's behind us - even if it's not entirely. Colorado's governor pictures a "[very close to normal](#)" summer.
- **Fear is slowly abating, but is still very real:** Despite the increased optimism, most Americans (64%) still fear returning to normal public activity - down from (70%) on January 10th and (67%) fear leaving home for essential errands - down from (76%) during the same timeframe.

Implication:

Americans feel the tide is turning: 69% say the worst of the pandemic is behind us, up 7-pts from just two weeks ago. But still have a long way to go before we feel completely normal. If resiliency is the reward, let's look back and see how we got there.



WAVE 49

WAVE 49 INTRODUCTION

The following research was conducted between **March 5-7, 2021** by The Harris Poll. Fielded among a nationally representative sample of **1,963** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

HARRIS POLL DATA INFORMS CDC'S GUIDELINES FOR VACCINATED PEOPLE

Introduction:

On Monday, the CDC issued highly anticipated [guidelines for Americans](#) who are fully vaccinated against COVID-19. We have been proud to work in partnership with the CDC since August in helping to navigate public opinion around the pandemic and our insights helped to inform the CDC's guidance on the easing of restrictions for these Americans.

- Prior to the CDC's announcement, **vaccinated people weren't being reckless**: they were less likely than the general public to feel comfortable visiting friends and family without a mask (32% vs. 37% of the general public) or shopping in a store without a mask (18% vs. 24%). **Those vaccinated are also more hesitant to travel** - only 18% would feel comfortable flying on a plane and 22% feel comfortable staying in a hotel (vs. 20% and 27% of the general public, respectively).
- **And they were still taking precautions**: Last week, we found 92% of those vaccinated were wearing a mask more often or the same relative to a month ago (vs. 88% of the general public) and were just as likely as the public to be only gathering indoors with people from their household (83%).
- **How do those who are already vaccinated feel?** 29% said their primary emotion was feeling relieved they are now protected, while 27% felt **lucky** they were one of the first to be inoculated and 20% said it gave them **optimism** that the pandemic will end soon. Only 10% said they were **impatient**; they have to wait for their friends and family to be vaccinated and only 7% said they are **frustrated** they are still restricted from resuming normal activity.

Implication:

Normalcy and eased restrictions are being viewed as a critical motivator to get the vaccine: part of the CDC's decision to ease restrictions on vaccinated Americans is to encourage people to get inoculated: "Relaxing certain prevention measures for fully vaccinated persons may be a powerful motivator for vaccination, and thus should be an important goal of the U.S. vaccination program."

Section:

02

Topic:

AMERICANS SAY WE AREN'T OUT OF THE WOODS YET

Introduction:

Last week, we noted how Americans are increasingly optimistic the end of the pandemic is in sight. But most Americans are still cognizant that we have a long way to go before we are in the clear and are willing to wait until the crisis phase is over before lifting restrictions.

- **Are we out of the woods yet?** 57% say today we are not out of the woods yet and are just back to where we were during summer 2020, while 43% would describe the current state of the pandemic as our current level is nowhere near as bad as previous levels because all vulnerable people are being vaccinated.
- **Americans prefer to wait until after hospitalizations are low and everyone is able to get a vaccine before “normal”:** 30% say 100% of COVID-19 restrictions should be lifted only after a consistent decline in cases and hospitalizations that brings them to a negligible rate for a period of time, while 28% say it should be after anyone in the general public is able to get a vaccine if they want one and only 9% say it should be after anyone in a priority group is able to get vaccinated. Only 19% say they should be lifted right now.
- **In the meantime, Americans are content with current restrictions:** 61% of Americans say their local restrictions to enforce social distancing are “about right” (including 57% of Republicans and 64% of Democrats). Only 20% say their restrictions are too lenient, while 19% say their restrictions are too strict.

Implication:

[As reported in the New York Post](#), our tracking data showed last week that the fear of dying from COVID dipped below 50% for the first time since July... “While Americans remain vigilant over the pandemic,” Harris Poll CEO John Gerzema said, “it is an encouraging sign to see greater acceptance of the vaccine, a belief that there is light at the end of the tunnel, and a declining sentiment in fear of dying from the virus.”

Section:

03

Topic:

SOCIALIZING AFTER A YEAR OF SOCIAL DISTANCING

Introduction:

As restrictions begin to lift around the country, Americans are reconsidering their ideal way of socializing. At the beginning of the pandemic, many felt isolated by the new way of life dictated by the freshly implemented social distancing rules. A year later, with vaccinations ramping up and an end in sight, Americans are ready to explore what is now our [new normal](#).

- **Home is where the party is:** Three-quarters (75%) of Americans said social distancing made them realize that they preferred small social gathers at home over at a bar or restaurant, while 72% say they will miss the comfort of home and (58%) the creative side of hosting while socializing at home. Millennials miss the creativity the most (68%).
- **The new normal for socializing:** Although Americans have mainly been restricted to their homes, nearly half (48%) say that they will continue to socialize within the home in the future and 17% said they would mostly go to bars or restaurants. More than one third (35%) say a mix of both is preferred. These sentiments are true across generations.
- **But consumers won't be hermits post-pandemic:** 21% have already resumed pre-pandemic levels of going out and there are benefits that come with going out such as meeting new people (51%), especially for Millennials (62%). Businesses that offer in-person services will have to think creatively how to blend the comfort of home entertaining with the connection that comes with going out.

- **A new kind of passport:** Organizations have touted the idea of vaccination passports to ensure safety when people can begin mingling in large crowds again. Six in ten (63%) support businesses using a "vaccine passport" in which a customer would be required to show they received a COVID-19 vaccine or a recent negative COVID-19 test in order to do public activities such as fly on a plane or attend a [major league sporting event](#). Although not a new concept, only four in ten (39%) are familiar with the idea of vaccine passports.

Implication:

Americans are ready to socialize, but not in ways that resemble life as it was prior to March 2020. People are eager to get back to enjoying things like hugs with family members, trying out a new restaurant in town, and seeing their favorite band - but the last year has left its mark on our psyche.

Section:

04

Topic:

SHOULD THE MASK STILL BE MANDATED?

Introduction:

States across the country are lifting mask mandates, shifting the decision to the individual consumer or business to decide if masks should be worn. In our most recent data, only 24% of Americans are comfortable today shopping in a store without a mask.

- **The Last Word:** Nearly one-third (31%) say the company itself should have final say if masks are worn on their property, while 22% say it should be left to the state government, 18% the federal government, and 15% the local government. **Only 14% say the customer should have final say**, though Republicans are three times as likely as Democrats to say it should be left to the individual (21% vs. 7%).
- **Protecting employees, customers should be highest priority:** Three-quarters (74%) say businesses should prioritize employees and other customers feeling safe from contracting COVID-19 by mandating masks while only 26% say **customers being able to decide** to not wear a mask if they do not want to, should be the higher priority. While a majority of both parties say employees and other customers should be the higher priority, Republicans are much more likely than Democrats to say the customer's individual decision should be higher priority (39% vs. 17%).
- **Most (76%) Americans would wear a mask in a store even if they were not required to.** But an age gap exists: Boomers (81%) and Gen X (79%) are more likely than Millennials (71%) and Gen Z (68%) to self-mask during the pandemic.
- Though the statewide mask mandate was lifted in Texas, [retailers such as Costco, Kroger, and Target will stick with required masks in their stores](#) to protect their employees and customers as the COVID-19 pandemic continues.

Implication:

Despite a small yet vocal constituency opposed to being required to wear masks in stores, businesses are right to maintain the trust of employees and customers by ensuring they feel safe during the pandemic.

Majority of Americans Would Wear a Mask Today in a Store Without Mask Requirement



Section:

05

Topic:

SPRING IS THE NEW CHRISTMAS AS BRANDS PREP FOR THE RETURN OF ROARING '20S CONSUMERISM: AD AGE-HARRIS POLL

Introduction:

Spring is the new Christmas for marketers preparing to unleash media spending in anticipation of an explosive sales uptick as the weather warms and consumers rush to resume their everyday lives. The marketing industry is looking to spring, typically a time of rebirth and renewal, to reconnect with customers eager to get out and spend as COVID-19 vaccines roll out and the threat of the coronavirus diminishes. [Our recent survey with Ad Age](#) looks at what this means for brands:

- **Vaccine Optimism:** 30% of households making \$100,000 or more a year said they'll spend more this spring compared to last; the majority of this group said the vaccine rollout has influenced this decision.
- **The Return of Brick-and-Mortar:** Shopping will extend beyond ecommerce to brick-and-mortar stores **as consumers get comfortable again with in-person experiences**. Some (62%) of consumers say they plan to shop in stores this spring at least once a week.
- **Americans want to get back out:** One-third (34%) of Americans plan to travel out of town this spring, while another 35% plan to do so this summer.

Implication:

"Right now, every brand is figuring out how to either retain their newly won customers or gain back lost ones," says Mark Penn, chairman and CEO of MDC Partners. "The race is on, and meanwhile, consumers have fundamentally changed - they're simply not going back to pre-COVID brand expectations."



WAVE 48

WAVE 48 INTRODUCTION

The following research was conducted between **February 26-28, 2021** 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:

AN END IN SIGHT?

Introduction:

Despite the U.S. reporting more than 65,000 new COVID-19 cases per day - [comparable to last summer's peak](#) - many Americans are feeling (cautiously) optimistic about the direction of the pandemic as cases and deaths decline and the vaccine rollout gains steam. We look at how the outlook on the pandemic has increasingly improved over the last month:

- **Vaccine Momentum:** two-thirds (66%) of Americans approve of how the vaccine rollout is being handled in the U.S., up 14-pts (from 51%) just a month ago. However, more than 4 in 10 (44%) still say the rollout is moving too slowly, down 8-pts (from 52%) just a month ago.
- **A light at the end of the tunnel:** three-fifths (62%) say the worst of the pandemic is behind us, up 28-pts (from 34%) on January 10th. And when asked if they can see a light at the end of the pandemic's tunnel or if we're still too far away, a similar number (58%) say they can see the light.
- **But Americans remain cautious:** more than two-thirds (69%) remain concerned about a new wave of the virus, down 12-pts (from 81%) on December 23rd and just under half (46%) say they remain concerned they could lose their job due to the pandemic.
- **The road to normal will be long:** today, only 31% feel comfortable visiting friends or family without a mask (up 7-pts from January 10th); 26% feel comfortable eating indoors (up 6-pts); and 21% feel comfortable shopping in a store without a mask (up only 3-pts).
- **Roadmap to normal:** [as Axios notes](#), states such as Colorado are already setting a timeline for a return to normalcy, which even includes crowds in some capacity at famed concert venue Red Rocks.
- **The Atlantic looks at the pivotal question** "at some point - maybe even soon - the emergency phase of the pandemic will end. But what, exactly, is that magic threshold?"

Implication:

After a devastating winter, the notable decline in cases and deaths alongside an increasing supply of vaccines is certainly cause for optimism. However, the road ahead remains difficult and many public health officials remain concerned about a surge in new cases and deaths as well as what new variants could mean for vaccine efficacy.

Section:

02

Topic:

MOST THINK IT'S A GOOD IDEA TO GIVE NBA PLAYERS EARLY ACCESS TO VACCINE: AXIOS-HARRIS POLL

Introduction:

NBA players are [expressing apprehension](#) about accepting the league's offer to provide early access to COVID-19 vaccines in an effort to build trust and acceptance of the vaccine among its fans, especially among younger generations and Black communities who are more hesitant to take the vaccine. We asked Americans if they think it's a good idea and [our findings were featured exclusive in Axios](#).

- More than half (54%) of Americans think it would be a good idea to give NBA players early access to the COVID-19 vaccine in order to increase public confidence in it, including (61%) of Gen Z; (69%) of Millennials, and (61%) of Black Americans.
- **NBA players can reach core audiences** (39%) said they'd be more comfortable getting the vaccine if NBA players publicly received it first, led by (78%) of Gen Z; (59%) of Millennials, (55%) Black Americans, and (54%) of Asian Americans.
- **They might get some off the sidelines:** Half (51%) of those who say they will "wait awhile and see" and (29%) of those who say they won't take the vaccine say they'd be more comfortable (vs 33% who say they'll go the first day they can).

- [The One Shot NBA Players Might Not Take](#): The Wall Street Journal explores vaccine hesitancy among major league athletes as NBA, NFL, and MLB players as their leagues try to persuade them to take the vaccine.

Implication:

Earning the trust of Americans who are hesitant to take the vaccine must involve a portfolio of tactics to address different constituencies and meet them where they are. Influential public figures such as professional athletes who appeal to vaccine-hesitant communities like younger Americans (35% of Gen Z and 34% of Millennials are not likely to take the vaccine) and Black Americans (36% not likely) will be a critical part of the vaccine campaign.

Section:

03

Topic:

A THIRD VACCINE ARRIVES

Introduction:

At the end of last week, the FDA approved a third COVID-19 vaccine - this one a single dose shot from Johnson & Johnson. And yesterday, the federal government announced a deal in which Merck will help to produce additional doses of the J&J vaccine. We asked Americans what they think about the new vaccine:

- Three-quarters (74%) of Americans have heard a little or a lot about the J&J vaccine, with Boomers (84%) and Democrats (81%) the most aware.
- **Despite the J&J vaccine's 100% efficacy at preventing hospitalization and death due to COVID-19, many remain skeptical - similar to our polling on the Pfizer and Moderna vaccines:** only about three-quarters think J&J's vaccine is effective at preventing hospitalization (78%, with only 38% saying very effective), dying (76%; 37% very effective), and catching and transmitting the virus (75%; 27% very effective).
- **Most think J&J is as effective as Moderna, Pfizer:** despite coverage around J&J's lower efficacy rate, 39% say they think it is just as effective as Moderna and Pfizer vaccines, while 21% say it is more effective. Only 19% say it is less effective; 21% aren't sure. Though Boomers are skeptical: 27% of Boomers say J&J is less effective, vs. 10% of Gen Z and 11% of Millennials.
- **Less effective label likely isn't a problem:** Even after learning that J&J's single dose shot is less effective than the double dose Pfizer or Moderna vaccines, 64% say they would be willing to get the J&J if offered to them.

Implication:

Johnson & Johnson's vaccine arrives as America moves into the middle portion of its historic vaccination campaign and is a critical piece of [President Biden's announcement yesterday he expects enough vaccine doses for all adult Americans by the end of May](#). And the public are buying it: following the J&J news, 69% of Americans are optimistic anyone who wants a vaccine will be able to get one by the end of this summer.

Section:

04

Topic:

WORKERS ARE LOOKING FOR A CAREER CHANGE: FAST COMPANY- HARRIS POLL

Introduction:

It looks like it may be time for a career change for many, according to a [recent Fast Company-Harris Poll](#), which found over half (59%) of middle-income workers said they're thinking about changing jobs. Unsurprisingly, remote work may be a driving force.

- **The job hunt is on:** The majority (52%) of U.S. workers are considering a job change this year, and as many as 44% have actual plans in place to make the leap.
- Managers and highly skilled workers are also prepared to change jobs. Close to half (48%) of six-figure salaried workers are plotting their switches and as many as 66% of them are feeling more confident about their decision to change jobs than they did six months ago.
- **Remote options are key:** Remote work and work-from-home options are valued by 68% of currently employed workers, and 43% of women asserted that these options are "very important," versus 33% of men.
- **Flexibility is a priority:** Eighteen percent of workers said they'd prefer to have more flexible hours in a new job.

Implication:

The pandemic has changed the way we think about home and work life, and is unsurprisingly showing employees and employers that it will be important to embrace flexibility going forward. One thing seems to be clear, many Americans are ready for a new career and the pandemic has offered the leverage for them to prepare to make that jump.

Section:

05

Topic:

BURGER KING'S NEW LOOK EDGES OUT MCDONALD'S: ADAGE-HARRIS POLL

Introduction:

The [latest Ad Age-Harris Poll](#) asked U.S. consumers about the new looks that both McDonald's and Burger King unveiled for 2021. Although McDonald's remains the market leader by a wide margin, this early survey found Burger King's fresh packaging design edging out the overhaul announced last week by McDonald's.

- **Burger King is crowned the king:** More than half (54%) of respondents said they preferred Burger King's packaging, while 46% chose McDonald's. In addition, 56% said Burger King's new look made the food look more appetizing, while 44% picked McDonald's as having the more appetizing design.
- **The new packaging shows signs of potentially improving sales:** More than 40% of those who like the new looks presented by Burger King or McDonald's say they are more likely to patronize the chains. This impact was most pronounced among consumers in the 35-44 age range (66%) of consumers in that group who preferred Burger King's new design say they are more likely to buy its products, while 62% who preferred McDonald's new look said the same.
- **Retro is in:** 16 consumers specifically mentioned "retro" and five mentioned "nostalgic" or "nostalgia" when asked what Burger King's packaging designs made them think of, vs. only six who said the same of McDonald's. A 63-year-old woman said Burger King's new look made her think of "the groovy sixties" and felt McDonald's was "clean and simple."

- **Men and women differ on the new looks:** women are nearly evenly divided with half (51%) of women picking Burger King over McDonald's. Burger King's lead grows with men, with 57% of them preferring it.

Implication:

Although Burger King is seeing some early enthusiasm for their packaging redesign, this alone won't be enough to boost them to the share that McDonald's owns. What is key for both brands is that large numbers of consumers said they are more likely to buy their products: 48% of consumers who preferred Burger King's new design said they're more likely to buy its products and 41% of those who preferred McDonald's new design said they're more likely to buy McDonald's products. That alone shows early successes for both brands' new looks.



WAVE 47

WAVE 47 INTRODUCTION

The following research was conducted between **February 19-21, 2021** by The Harris Poll. Fielded among a nationally representative sample of **1,984** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

AMERICANS STILL DON'T UNDERSTAND HOW BITCOIN WORKS: BLOOMBERG- HARRIS POLL

Introduction:

Mainstream financial institutions have started embracing cryptocurrencies. Main Street hasn't. More than one in 10 American adults have never heard of cryptocurrencies such as Bitcoin, according to [a new survey by The Harris Poll shared exclusively with Bloomberg. Here is what we found:](#)

- Nearly half of respondents had only heard the names of those coins, whereas 16% said they were very familiar with the cryptocurrencies and 28% said they were somewhat familiar.
- **Most people who have heard of cryptocurrencies don't totally get them:** 61% of people who had heard of the coins said they had little or no understanding of how they work. Only 14% of those familiar with crypto said they understand "very well" how they work.
- **Trust remains another factor:** among people familiar with cryptocurrencies, some 43% expressed doubts about their legitimacy as a form of payment. And 29% think crypto will largely be forgotten in 10 years, whereas 34% believe it will become a standard form of payment.

- **Across demographic groups, age wasn't necessarily the biggest indicator of faith in crypto:** while 58% of Gen Z who knew about crypto said they thought digital currencies were very or somewhat legitimate as a form of payment, this figure rose to 69% for Millennials.

Implication:

In recent months, companies such as Tesla have said they plan to begin processing payments in cryptocurrencies. However, few people actually use bitcoin to make purchases: only 10% of people familiar with crypto said they regularly make purchases with it. "From the public standpoint, it's not a cryptocurrency, it's a cryptic-currency," said John Gerzema, CEO of The Harris Poll.

Section:

02

Topic:

MORE THAN HALF OF ALL CONSUMERS CHANGE BUYING HABITS BASED ON CEO ACTIONS

Introduction:

Half of Americans have changed their buying habits due to a CEO's actions, young people believe employees, not customers, are a CEO's highest priority, and consumers are divided based on age and ethnicity on the role a chief executive should play on social issues. In a new Harris Poll survey in conjunction with The Stagwell Group, CEOs today have an oversized impact on their company's reputation. In fact, half of all consumers say they have changed their buying decisions based on the actions of a CEO. Earlier this week, Harris Poll CEO John Gerzema and Vice Chair of The Stagwell Group Ray Day [gave a webinar](#) on why CEO reputation matters.

CEOs are becoming more visible and their actions more directly linked to the success or failure of their companies – from products and services to reputations, the study shows.

- 85% of Americans say the CEO has an oversized impact on the reputation of a company today
- **Ethical standards are the highest-valued CEO quality** – ahead of company vision and products and services

- **Humility is undervalued among CEOs today**, and 72% of Boomers believe there is more risk than reward in CEOs speaking out on social issues, while 56% of Gen Z and 55% of Black Americans say just the opposite

As with many things, Americans are divided and disagree on how a CEO should engage with stakeholders and speak out on issues. Boomers, White Americans, and Republicans are clear about focusing on business and staying away from issues:

- 61% of Boomers think it is bad for companies when CEOs become more active in expressing political views
- 65% of White Americans think that CEOs speaking out puts them in an "unwinnable" situation, bound to alienate and frustrate some stakeholders
- And 49% of Republicans think CEOs aren't politicians and should stay out of political issues.

At the same time, appealing to younger, Black Americans, and Democrats requires a different approach:

- 31% of Millennials purchase stock based on whether a company shares their values
- 41% of Black Americans think it's better to take a stand on issues than not, even if it offends some
- And 42% of Democrats think CEOs are responsible for expressing the values of their companies, even if that brings alienation or controversy

Alienation is a risk in a highly polarized society, but so too is the risk of stakeholders who perceive CEOs as indifferent or in conflict with the company's principles. This is especially true among younger and Black Americans. While standing down is expedient, a generational and cultural divide is growing that will make decisions more difficult and polarizing.

Today's CEO has reputational capital: She or he influences sales, perceived product/service quality and signals the strength of culture. As CEO reputation extends ever-outward, when to exert influence in society becomes more calculated and more important.

Section:

02

Implication:

CEO reputation today means more than mastery of the marketplace. It requires a leader's commitment to serve society. With that comes the burden of leadership: The public believes CEOs should stand on issues where they have credibility and constituency and be wary of wading into issues where they don't have a voice or authority. Ultimately, core values should be the navigator of social issues.

Section:

03

Topic:

SOME AMERICANS STILL DON'T THINK THE VACCINES WORK

Introduction:

The vaccine rollout in America continues, though one-third (32%) tell us they are not likely to take the vaccine. In our latest survey, we asked Americans how effective they think the vaccines are at preventing death, hospitalization, and transmission. Despite increasing [real-time evidence](#) that existing vaccines are extremely successful at preventing deaths and hospitalizations - and transmission to a lesser extent - many Americans aren't buying it:

- One-quarter (24%) of **Americans say existing COVID-19 vaccines are not effective at preventing death due to COVID-19 complications** (and another 41% say they are only somewhat effective; 35% say very effective). Skepticism is highest among Gen Z (37% say not effective), Millennials and Black Americans (both 31%).
- **A similar number (22%)** say the vaccines are not effective at preventing them from being hospitalized due to severe illness from COVID-19.
- **Some say “why bother”:** More than one-quarter (27%) of Americans say existing COVID-19 vaccines **are not effective at preventing them from catching and transmitting the virus to others**. And just over one-third (35%) of those unlikely to get the vaccine (and 18% of the general public) say they won't get the vaccine because it won't prevent them from catching COVID-19 anyway.
- **Effective messengers:** two-thirds (66%) of Americans say the CDC has done a good job explaining the safety and risks of the vaccines (only 24% say they have done a poor job; 10% aren't sure), while only 54% say the media has done a good job. More than one-third (35%) say they have done a poor job and 11% aren't sure.

Implication:

[David Leonhardt at the New York Times](#) unpacks “vaccine alarmism” around the vaccine’s relatively small shortcomings: “much of this message has some basis in truth, but it is fundamentally misleading. The evidence so far suggests that a full dose of the vaccine [...] effectively eliminates the risk of death, nearly eliminates the risk of hospitalization, and drastically reduces a person’s ability to infect somebody else. Yet the alarmism continues. And now we are seeing its real-world costs: Many people don’t want to get the vaccine partly because it sounds so ineffectual.”

Section:

04

Topic:

AMERICANS ARE NEGLECTING THEIR HEALTH: TIME-HARRIS POLL

Introduction:

There's more than one way to get sick during the COVID-19 pandemic. You can contract the virus, of course, as more than 28 million Americans already have. Or you can dodge the disease but still suffer from the disruption caused by quarantines and social distancing, if they lead you to neglect routine health care. That, [a new TIME-Harris Poll shows](#), is just what too many of us are doing:

- **The top-line numbers are sobering:** 78% of Americans have put off at least some medical services during the pandemic. Of those procedures, dental exams or cleanings were the most frequently missed, with 30% saying that they have passed on regular oral care. Annual physical check-ups were next at 27%, followed by eye exams at 25%.
- **Demographics play a significant role in who is staying current with health care during the pandemic and who is letting things slide.** Only 16% of people with a high school education or less have put off their routine check-ups during the pandemic, compared to 31% of people with some college and 34% of college graduates.
- **As with so many things, race and ethnicity play a significant role as well, with communities of color suffering more - often lacking health insurance and working in lower income jobs.** Among white Americans, 20% report missing their annual check-ups during the pandemic, compared to 29% of Black Americans and 48% of Hispanic Americans.

- **Unexpectedly, mental health services, which would seem like the kind of care that most lends itself to telehealth since it so often involves nothing more than a conversation has lagged.** Among all respondents, only 24% said they were currently receiving mental health care, down from 29% before the outbreak.
- **Some positive findings are buried among the more concerning ones, much of them regarding telehealth, which is clearly experiencing a boom:** only 29% of people reported receiving some of their health care online prior to the pandemic; that figure jumped to 51% during the pandemic era.

Implication:

It's too early to tell how the health care landscape will change after the pandemic is at last over. For example, some who have picked up telehealth may decide they like it and stick with it. Others may decide they prefer the old face-to-face model. What it's not too early to say is that a country that already suffers from too much chronic illness will be wise to return at least to its pre-pandemic levels of doctor visits when the pandemic is in the rear-view mirror.

Section:

05

Topic:

HARRIS POLL CEO WILL JOHNSON: IT'S TIME FOR MAJOR BRANDS TO COME OFF THE BENCH AND GET BACK IN THE GAME

Introduction:

Pent-up demand for college basketball is creating an opportunity for advertisers around March Madness. After major brands like Coca-Cola, Budweiser and Pepsi sat out of the Super Bowl, Harris Poll CEO Will Johnson wrote an [op-ed for AdAge](#) detailing our survey findings on why brands need to take a shot at advertising during this year's tournament—and how they should approach their ads. Here's what he has to say:

- **Americans are more amped up for this year's tournament:** Most Americans who plan to watch the games this year (53%, including 58% of men and 65% of Millennials) describe themselves as more excited for this year's tournament than they were for last year's before it was canceled.
- **That excitement is reflected in viewing plans:** While only 39% of Americans watched any of the 2019 March Madness tournament, 46% intend to do so this year. Half of men watched two years ago, but 60% plan to do so this year.

- **Viewers want brands to be upbeat:** When we asked those who plan to watch what kind of mood they would like to see TV ads express during game breaks, the three most frequent answers were “optimistic” (51%), “lively or energetic” (49%), and “funny” (47%), and it wasn't close: “Nostalgic” was a distant fourth at (23%).
- **Viewers want ads to be relatable:** In terms of the specific types of content that will appeal to them, viewers say they want to see ads with situations or jokes which reflect their everyday lives (44%) and they want ads showing people helping others (43%).
- **Star power isn't so powerful:** A majority of those who plan to watch the games (55%) say that ordinary people appearing in the ads would most appeal to them, and 41% said they wanted to see ethnically or racially diverse ads. Athletes (30%) and celebrities (29%) were markedly less popular choices, bringing up the rear with American viewers.

Implication:

Consumers want relatable reality rather than Hollywood glitz in the breaks when watching March Madness this year. This should be a lay-up for advertisers - at least the ones who are carefully listening.



WAVE 46

WAVE 46 INTRODUCTION

The following research was conducted between **February 12-14, 2021** by The Harris Poll. Fielded among a nationally representative sample of **1,984** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

VACCINES LIKELIHOOD RISES, AS DOES DOUBLE MASKING

Introduction:

As COVID-19 vaccines continue to roll out across the country, our latest data shows vaccine likelihood continues to rise as well; 70% are likely to get the vaccine as soon as it becomes available to them (up from October 24th when vaccine likelihood was at its lowest 54%). And with the arrival of new virus variants, we checked in on attitudes towards double masking:

- While vaccine skepticism is declining, there is still a racial disparity: Among those who are not likely to get the vaccine (30%) **Black Americans remain the most unlikely** to get the vaccine (39%) compared to White Americans (27%), **citing lack of trust** in the government to make it safe (21%) vs. (14%) of White Americans.
- Based on the **new COVID-19 variants**, scientists and experts are recommending that people "double mask", and our latest survey findings that the majority (61%) **support double masking**. We see higher support among those who are typically more at risk (64% Boomers vs. 55% Gen Z) and those who are more likely to get the vaccine (70%) vs. (39% not likely).
- **But support doesn't always mean action**: While, less than a third (28%) say "double masking is going too far," more people say, "**I think it's a good idea, but I'm not double masking right now**" (40%) vs. those who say, "I think everyone should be double masking right now given how dangerous the new variants are" (32%).

- In fact, **less than half (43%) say they are double-masking** always/most of the time. This is up slightly from two weeks ago on January 31st, when 39% said they were double masking. Interestingly, Hispanics, Black Americans and Asian Americans are more likely to be double masking than White Americans (62%, 58%, 54% vs. 39% respectively).

Implication:

While vaccine skepticism is dwindling, racial disparities still pose challenges, as does a passive mindset towards double masking (the top recommendation to protect against variants) where many say they support it but don't plan on doing it.

Section:

02

Topic:

1 IN 4 AMERICANS WERE UNABLE TO GET A COVID-19 TEST WHEN THEY WANTED ONE: STAT-HARRIS POLL

Introduction:

As the U.S. struggles to contain the COVID-19 pandemic, nearly a quarter of Americans say they wanted to get tested for COVID-19 but were unable to do so, [according to the latest survey from STAT and The Harris Poll](#).

- **Nearly one-quarter (24%) of Americans reported that they could not get a COVID-19 test due to various reasons** – (10%) the wait for a test was too long, (8%) a testing site was not nearby, (8%) it was unclear where to go for a test, or (7%) transportation to a test site was unavailable. Some people cited more than one of these hurdles.
- At the same time, nearly one-third (31%) said they were able to get tested when they sought to do so. The rest (45%) said they have never wanted to be tested.
- Half (49%) of Americans have been tested for COVID-19: (19%) once; (16%) two to four times; and (14%) five or more times. Most (56%) have been tested at a hospital or drive-through site. For the vast majority (69%), the test was conducted using a nasal swab.

- **The most common reason for receiving a COVID-19 test — at (28%) — was that they had come in contact with someone who had tested positive for COVID-19**, while 24% said they had possible symptoms of COVID-19 and 21% were required to get tested by their job or school.

Implication:

Vaccines will be the magic bullet to end the COVID-19 pandemic, but testing will continue to play a crucial role in containing spread until herd immunity is reached. The notable percentage of people who ran into difficulties getting tested underscores one of the ongoing challenges that federal and state officials face as the country attempts to contain the coronavirus.

Section:

03

Topic:

OAAA-HARRIS POLL: 6 CONSUMER HABITS THAT WILL BOOST OOH IMPACT IN 2021

Introduction:

- **Americans are becoming more receptive to outdoor messaging:** 19% are noticing out of home (OOH) advertising much more, up 5-pts since the fall, as they are increasingly tired of looking at their smartphones: 75% of respondents said they are experiencing digital device fatigue (up 7-pts since the fall).
- **COVID hasn't completely ruined the commute:** Over the next few months, 70% of workers will be commuting at least part time; 45% will commute daily and 26% mix working from home and commuting.
- **Different levels of income are also tied to workers' need to commute:** 57% of households with an income of less than \$50,000 per year will commute compared to 34% of households that make more than \$150,000. But 66% of the \$150,000 households will commute at least part-time.

- **OOH advertisers will want to reach consumers where they are:** Most Americans (86%) are visiting the grocery store and 70% are driving on the highway at least once a week. In general, 83% of people notice OOH while driving on highways, more than driving around a home town (82%) or when visiting a city or town where they don't live (71%). One-quarter (24%) said OOH informed them of a new brand this past year, while in larger metropolitan areas, 34% said outdoor ads pushed them to buy a product.

Implication:

"People are eager to make up for lost time," said John Gerzema, CEO, The Harris Poll. "They're looking to get back out into the world with a vengeance. Brands should meet consumers where they are, which will be anywhere but at home on Zoom."

Section:

04

Topic:

HARRIS POLL INAUGURAL BRAND BOWL

Introduction:

Last week, The Harris Poll was excited to release [the inaugural Brand Bowl report](#) which looks at the impact Super Bowl LV's commercials had on brand equity - momentum, consideration, quality, and familiarity - for both emerging and established brand - by measuring before and after the big game to determine who saw the biggest gains. What did it find?

- **Most Super Bowl viewers preferred ads that were “funny or clever” (59%).** Ads that featured celebrities Americans liked also fared well, with 43% of viewers enjoying these spots, as did commercials that were uplifting (42%).
- Most (70%) of Americans claimed to have watched this year’s Super Bowl and **(93%) of watchers paid attention to the commercials.** Over 8 in 10 (82%) tuned in on a TV, with (60%) using cable or a satellite and (23%) streaming. Over one-quarter (28%) of viewers across all devices used an official stream, compared with (10%) who admitted watching on an unofficial one.
- **Lesser-Known Brands See Big Game Boost:** Dr. Squatch, the fast-growing soap brand, took a chance with an offbeat ad and tied with Paramount+ for first place in driving post-game awareness. And the ad’s unconventional take on an infomercial succeeded in changing consumer perception: the day after watching the ad, consumers were significantly more likely to associate Dr. Squatch with attributes such as ‘innovative’ (+23%), ‘young’ (+20%), and ‘visionary’ (+14%).

| | PRE | POST | GROWTH | | PRE | POST | GROWTH |
|---|------|------|--------|---|------|------|--------|
|  | 37.2 | 42.0 | 4.8 |  | 53.8 | 56 | 2.2 |
|  | 57.1 | 61.4 | 4.4 |  | 62.9 | 65 | 2.1 |
|  | 38.7 | 43.0 | 4.3 |  | 42.3 | 44.4 | 2.1 |
|  | 48.1 | 52.4 | 4.3 |  | 38.8 | 40.8 | 1.9 |
|  | 33.5 | 37.6 | 4.1 |  | 42.6 | 44.3 | 1.7 |
|  | 61.6 | 65.3 | 3.7 |  | 57.9 | 59.4 | 1.5 |
|  | 54.6 | 58.1 | 3.5 |  | 44.7 | 46.1 | 1.5 |
|  | 52.2 | 55.6 | 3.3 |  | 67.1 | 68.5 | 1.4 |
|  | 53.7 | 56.8 | 3.1 |  | 68.2 | 69.5 | 1.3 |
|  | 42.1 | 44.9 | 2.8 |  | 62.7 | 63.8 | 1.1 |
|  | 53.5 | 56.1 | 2.7 |  | 68.1 | 69.1 | 1.0 |
|  | 40.2 | 42.6 | 2.5 |  | 74.2 | 75.1 | 1.0 |
|  | 53.8 | 56.2 | 2.4 |  | 40.5 | 41.1 | 0.6 |
|  | 34.8 | 37.1 | 2.3 |  | 59.9 | 60.3 | 0.4 |
|  | 52.4 | 54.6 | 2.2 |  | 39.6 | 39.7 | 0.1 |
|  | 46.1 | 48.3 | 2.2 |  | 52.2 | 52.3 | 0.1 |
|  | 65.3 | 67.5 | 2.2 | | | | |

Implication:

[Ad Age cites the Brand Bowl](#) in a profile of Jeep’s highly covered commercial with rock legend Bruce Springsteen: “**The Harris Poll showed the spot as boosting Jeep’s brand equity, falling in the top half of that score among all Super Bowl advertisers.** The ad led to an increase of 93% in web traffic to Jeep brand pages on online retail site [cars.com](#). That placed the brand behind Cadillac (whose ad put a new spin on "Edward Scissorhands") but ahead of Toyota.”

Section:

05

Topic:

WHAT WE CAN LEARN ABOUT THE FALL OUT FROM GAMESTOP: USA TODAY-HARRIS POLL

Introduction:

The drama involving GameStop, Robinhood, and Reddit from earlier this month will be a case study in years to come in brand reputation and adapting to the new platforms. Last week, [Jessica Menton at USA Today used our data](#) to look at what we can learn from the fall out of the GameStop story:

- **Who do Americans blame?** When asked who was the “most in the wrong” in the trading mania that set off one of the biggest short squeezes in history, nearly half of Americans polled said it was either hedge funds (27%) or online brokerage Robinhood (22%).
- Just (8%) said it was the Reddit retail investors on the r/WallStreetBets forum, who angered hedge funds that had bet GameStop's stock would remain low. The small-time investors used the forum to help drive up the prices for shares such as GameStop, theater chain AMC Entertainment and several other companies.
- Why do Americans blame hedge funds or Robinhood? The Harris Poll CEO John Gerzema says it is because many Americans were angry that hedge funds were shorting stocks – betting that the share prices would fall – of companies that average people use and love.

How generational investors split over trading, controversy

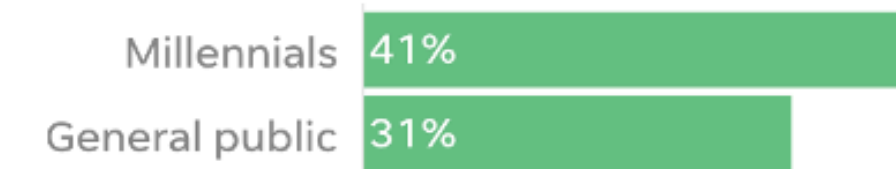
Percentage of stock-owning investors who use an app like Robinhood:



Percentage of Millennials who said Robinhood was acting in the interests of:



Percentage of investors who buy stocks from companies they love:



Implication:

“Many respondents were angry that hedge funds were shorting stocks – betting that the share prices would fall – of companies that average people use and love,” according to John Gerzema, CEO of The Harris Poll. “This wasn’t just an attack on a few weak companies. These are companies that are a part of middle-class America and ordinary people’s lives.”



WAVE 45

WAVE 45 INTRODUCTION

The following research was conducted between **February 4-7, 2021** 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:

WHY WE DON'T BELIEVE THE BIG CITY OBITUARY: BLOOMBERG-HARRIS POLL

Introduction:

A new survey by The Harris Poll and the Chicago Council on Global Affairs, [featured in Bloomberg](#), looks at the attitudes about urban and suburban life among the nation's six largest metropolitan areas and how they feel about the places they live during the pandemic.

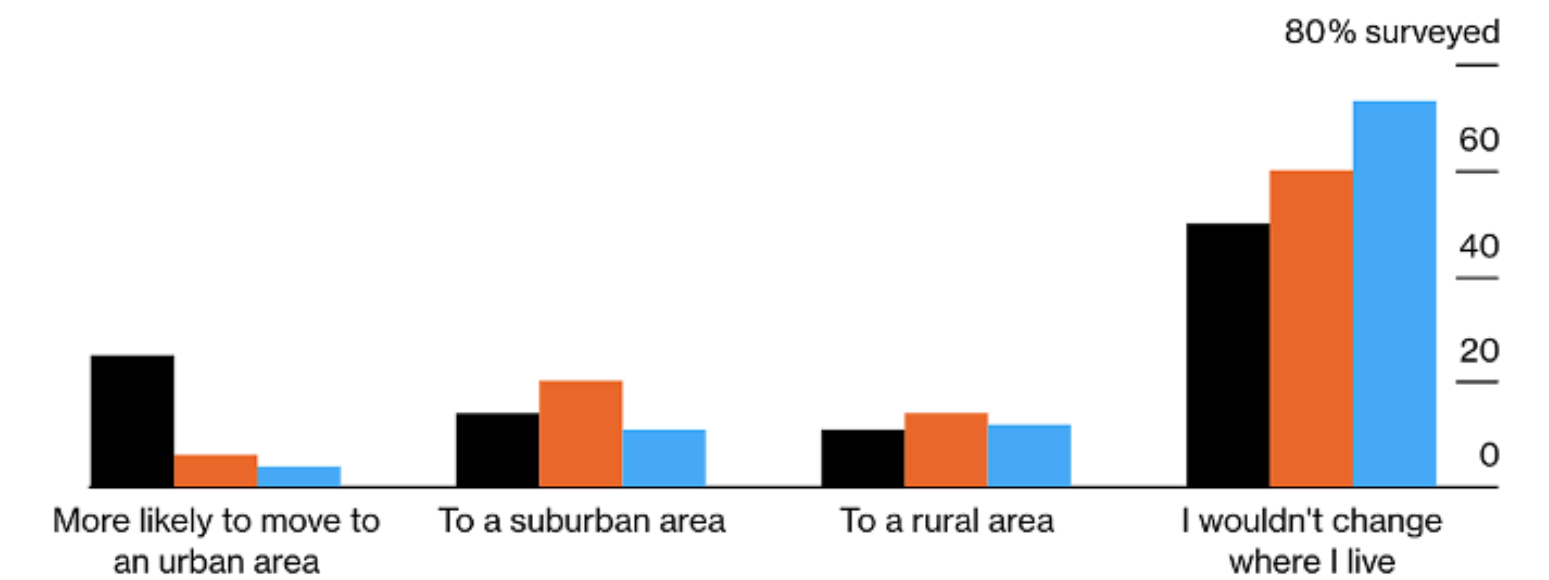
- Since the outset of the pandemic, many have been predicting a mass retreat from urban life. "New York City is dead forever," declared a [viral LinkedIn post in August](#). Last year "ended the boom of cities that started in the 1990s," announced a [recent op-ed in The Hill](#). Even [our own article with Axios](#) from April 2020 saw urbanites eyeing a migration from cities.
- After a year of living with COVID-19, the survey found no evidence of a long-term urban exodus. **The bulk of residents across community type — big city, inner suburb and outer suburb — are happy with where they live, and say they want to live in the type of community in which they currently reside.**
- When asked specifically how their pandemic experience has affected their preferences, **half of city residents say it has not changed where they prefer to live.** Another 25% say the pandemic actually makes them more likely to move to another urban area.

- Surprisingly, the survey found similar responses across income, race, education level and family status. Even those from households with children — people especially affected by lockdown and remote learning — are evenly divided on whether their pandemic experience has made them prefer suburban (20%) or urban living (19%). And of those in Generation Z (ages 18-24), many more say they want to live in big cities (39%) than in suburbia (25%), the lowest result of any age cohort.

Cities Are Not Going Away

"Has your experience with the pandemic made you more likely to move to a different type of area?"

■ Respondents living in a city ■ In inner suburb ■ In outer suburb



Source: The Harris Poll

Implication:

If our cities recover, as we believe they will, it will be a credit to the commitment, sacrifice and imagination of their citizens — the millions already there and those who move to join them. Even today, cities remain the place to be.

Section:

02

Topic:

COVID VARIANTS SIGNAL NEW CONCERNS AND URGENCY FOR THE VACCINE ROLL OUT

Introduction:

The majority (86%) of Americans are aware that the new COVID-19 variants identified in the United Kingdom, Brazil, and South Africa (B.1.351), have now been found in the U.S. And over three quarters (77%) are concerned. Here's what else we found:

- **Vaccinated Americans are among the most concerned** (82%) about new variants. Even though there is [now real evidence](#) that one of the variants poses a threat to vaccine power, [scientists stress the vaccines still appear to protect people from the worst](#) outcomes, like hospitalization or death.
- **Dr. Fauci and other experts urge this is even more reason to step up vaccination campaigns:** "Viruses cannot mutate if they can't replicate," [Fauci said Monday at a press conference by the White House's COVID-19 response team](#). Our data indicates more and **more Americans are coming around to getting vaccinated**; today 69% say they are likely to get the vaccine as soon as it's available.
- Still just under half (44%) say they **disapprove of how the vaccine distribution is going here in the U.S.** and 59% say "At the moment, I feel there is too much conflicting information about the COVID-19 vaccines that I am not sure who to trust."

- [Early data signals](#) racial disparities across COVID-19 vaccine rollout, due to **lack of information and mistrust in the healthcare systems**, a trend mirrored in our data: 80% of White vs. 69% Black Americans say they are aware of vaccine eligibility in their area and 41% of White vs. 28% of Black Americans said they've registered for an appointment to receive a COVID-19 vaccine. And 64% of White vs. only 50% of Black and 47% of Hispanics say they **would be comfortable receiving the vaccine from their doctor's office**.
- **Community mindsets matters:** 57% of Black and Hispanics say "**Hearing about others who are skeptical** of the safety of the COVID-19 vaccine is **making me rethink if I should get the vaccine myself**" vs. 42% White. And 59% of Black vs. 45% of White Americans say "**drug companies experimenting on consumers**" is a valid reason for vaccine skepticism.

Implication:

The arrival of new variants accelerates the urgency to increase communication and education on the vaccines, especially for minority communities who are at higher risk and also (rightfully so) have a [higher degree of distrust of the vaccines](#) given a troubling history with the healthcare system.

Section:

03

Topic:

REOPENING SCHOOLS IN THE PANDEMIC

Introduction:

Late last month, the Centers for Disease Control and Prevention (CDC) announced in-person schooling can be done safely if proper precautions such as mask-wearing, social distancing, and local community restrictions are taken, even before teachers receive vaccinations. This week we asked Americans how they feel about reopening schools:

- **Americans are divided on how schools should be operating in their area:** nearly one-third (32%) say they should be using a hybrid approach, while 28% say they should be held entirely in-person and 27% say they should be held entirely online.
- **A racial disparity exists in trust to reopen safely:** Though a majority (63%) of Black Americans trust their local school system to operate in-person safely given COVID, they still lag White Americans by a wide-margin (78%).
- **The New York Times profiles the struggle facing many Black families:** “deep-seated mistrust among Black families toward their public school districts is holding back school reopening, even as Black children suffer inordinately from remote learning.” And Black Americans are more likely than White Americans to favor schooling entirely online (34% vs. 23%).
- **Schools without vaccines:** Most Americans (80%) say it is important to vaccinate teachers before resuming any in-person classes. Though, a political gap exists: nearly all (91%) of Democrats vs. 70% of Republicans saying the requirement is important.

Implication:

Dr. Margaret Honein, a member of the CDC’s COVID emergency response team, summarizes what we’ve learned: “[Last year], we did not have a lot of data on whether or not we would see the same sort of rapid spread in schools that we had seen in other high-density [...] sites. But there is accumulating data now that with high face mask compliance, and distancing and cohorting of students to minimize the total number of contacts, we can minimize the amount of transmission in schools.”

Section:

04

Topic:

83% OF AMERICANS SAY \$7.25 MINIMUM WAGE IS NOT ENOUGH: YAHOO FINANCE-HARRIS POLL

Introduction:

Americans overwhelmingly agree the federal minimum wage should be increased, but many people think it should be considered separately from the next COVID-19 relief bill, [according to new findings from Yahoo Finance and the Harris Poll](#).

- **Most Americans support raising the minimum wage:** When asked what is the highest minimum wage they would support, most people chose the range of \$10 to \$15 an hour. More than one-third (35%) - the largest share of respondents - said they'd support between \$13-\$15 an hour, 29% would support \$10 to \$12, and 13% would back a hike to more than \$15 an hour (which Congress is not considering).
- **High earners, college educated disconnected from realities of minimum wage:** 83% of Americans agreed that a person working a full-time job at the current minimum wage of \$7.25 an hour isn't making enough money to live.

- People in households making more than \$100,000/year were most likely to think a full-time minimum wage job was enough for people to get by, according to the poll. More than one-quarter (28%) of high-earners said \$7.25 an hour was enough to live on, while just 12% of those in households making less than \$50,000 annually said \$7.25 wage sufficed.
- **Americans see a minimum wage hike as having a positive economic impact:** 59% of Americans believe raising the minimum wage would have a positive impact on the economy.

Implication:

[The Economist explores](#) the history of raising the minimum wage: "The world has little experience of large minimum-wage rises, and they could cost an economy jobs. Yet history also suggests that such increases, implemented with care, may nonetheless have beneficial longer-term effects."

Section:

05

Topic:

WHICH MICRO-INDUSTRIES WILL BOOM POST-COVID?

Introduction:

The COVID-19 pandemic has upended nearly every industry, making some “micro” industries newly integral to our lives while causing others to become relics of the past. We asked consumers which industries they expect to see boom, which ones will suffer, and which ones will stay the same as before, after things “return to normal.” Here’s what we found:

- **Experience seekers go long on travel and events:** Americans say tourism (51%), airlines (48%), and ‘experiences’ like concerts and sporting events (46%) will boom when we return to normal.
- **Industries of the future will take off:** About 3 in 10 also see a boom for solar energy (30%), cannabis (29%), telehealth (26%), and sports gambling (23%) after COVID.
- **Revenge spending at “mom and pops”:** Despite local retailers being some of the hardest hit businesses, more than one-third (35%) say “mom and pop” retailers will boom after the pandemic, while 27% say they will suffer. Rural Americans (39%) are more likely than Urbanites (30%) to think “mom and pop” retailers will see a boom.
- **Virtual workouts, the necessary evil of COVID, might stick around:** more than one-fifth (22%) expect online fitness to boom after the pandemic, while half (48%) say they expect it to remain unchanged. We asked Americans what they’ll do after the pandemic ends: one-quarter (26%) say they’ll stick with virtual workout classes only while 35% say they’ll be doing a hybrid of virtual and in-person workouts.

Implication:

[The Wall Street Journal](#) profiles how “cannabis companies are ready to roll” due to a combination of strong sales during the pandemic, easing regulations, and COVID-inspired innovations like online ordering and curbside pickup.



WAVE 44

WAVE 44 INTRODUCTION

The following research was conducted between **January 29-31, 2021** 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:

MILLENNIALS ARE DRIVING THE RETAIL INVESTMENT REVOLUTION

Introduction:

After last week's events surrounding retail investors making waves in the stock market with 'meme' stocks like GameStop through investing apps like Robinhood, the Harris Poll looked the role Millennials are playing in the recent boom of retail investors:

- **Millennials are fueling the rise of pandemic trading:** Since the start of the pandemic, 61% of Millennials have put more money into the stock market (vs. 45% of Gen X and 19% of Boomers). And they are more than twice as likely as Gen X to own cryptocurrency (40% vs. 19% of Gen X and 8% of Boomers).
- **And they see a shift in power - and a boom - for retail investors:** 43% of Millennials say last week's stock market events surrounding GameStop and Reddit represent a shift in the power of the stock market to retail investors (vs. 30% of Gen X and 21% of Boomers). And 83% of Millennial investors said they use a mobile app to buy or trade stocks, bonds, ETFs, or other securities.
- **Social media is the Millennial's Bloomberg Terminal:** 28% of Millennial investors say that recommendations from social media like Twitter and Reddit influence their decision to buy stock in a company (vs. 15% of Gen X and only 3% of Boomers). Millennials are also much more likely than older generations to buy the stocks of companies for which they are a user (38% vs. 25% of Gen X and 29% of Boomers).

- **Millennials recognize the benefits of retail investors:** half (49%) of Millennials say the benefits of retail investing outweigh the risks (vs. 43% of Gen X and 30% of Boomers). And most (80%) Millennials said that commission-free trading apps have a positive impact on the economy.

Implication:

Commission-free trading apps have "democratized" the once out-of-reach stock market for an entire generation as they reach the financial stage of their life when many have enough savings to focus on investing. As with many aspects of their lives - from travel lodging to dating to dog walking - Millennials will do it their way...on an app.

Section:

02

Topic:

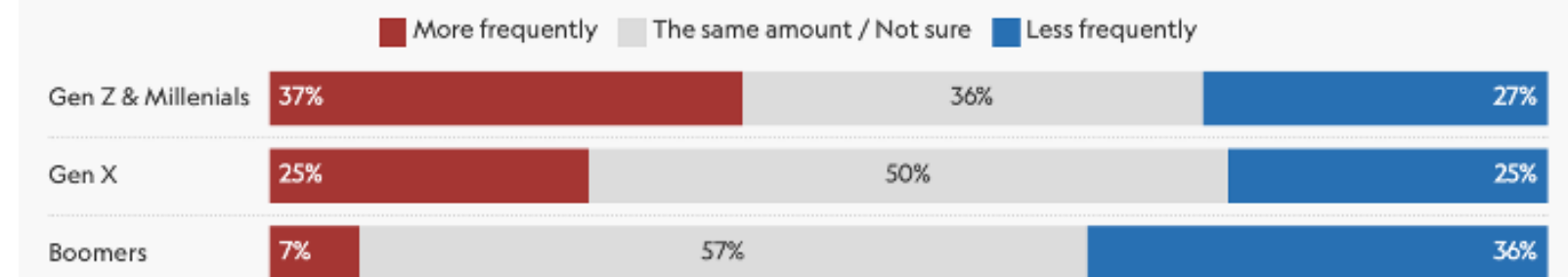
FANS AWAIT HERD IMMUNITY AMID SKEPTICISM FOR 2021: SPORTICO-HARRIS POLL

Introduction:

The U.S. surpassed 33 million COVID-19 doses administered this week, but [our new survey in partnership with Sportico](#) indicates that vaccination alone may not be sufficient for Americans to feel comfortable among large crowds. What is the future of full-capacity crowds at sporting events? We look at what fans are thinking:

- **Most Americans will be wary of live sporting events until after we reach herd immunity:** Two-thirds of Americans will not be comfortable in a full-capacity indoor arena (67%) or outdoor stadium (64%) for a sporting event until they've had a COVID-19 vaccine, and the majority will still not be comfortable until the country reaches herd immunity.
- **There is public support for vaccine requirements:** Three-fifths (62%) of people polled agree fans should be required to provide proof of a COVID-19 vaccination in order to attend a sporting event, including 70% of regular sports attendees. Even more Americans (67%) and frequent sports attendees (72%) agree that players and coaches should be required to receive a vaccine.
- **Regular attendees are eager to get back to stadiums:** While the general public is almost exactly split over whether they plan to attend live sporting events more or less frequently after the pandemic than before, 44% of those who attended at least five events in 2019 say they are more likely to attend, versus only 26% who say they are less likely. A similar mindset is observed among young people.

Young People May Attend Live Sporting Events More Frequently After the Pandemic



Full question text: "After the U.S. reaches herd immunity and things "return to normal", do you anticipate you will attend live sporting events more or less frequently than you did before the COVID-19 pandemic?"

Source: Harris Poll / Sportico

Implication:

As sports venues look to get fans back into seats, they should be pleased to know that 78% of those who attended at least five events in 2019 are likely to get the COVID-19 vaccine, versus just 68% of the general public.

Section:

03

Topic:

FROM BACKLASH TO DOUBLE-MASK

Introduction:

With news of new COVID-19 variants, public health officials are suggesting double masking as a way to increase the level of protection. At face value, double-masking might seem like a tall order ask of the public given America's contentious relationship with masks; but our new data shows some are embracing the new trend, possibly signaling a softening of the mask backlash.

- **The case for double layer protection:** According to [recent studies](#), a single-layer mask provides somewhere in the 50% to 60% range of effectiveness in blocking aerosols. But put a surgical mask under a cloth mask and you get "over 91% removal efficiency for particles," said Joseph Allen, an associate professor at the Harvard T.H. Chan School of Public Health [in a recent interview](#).
- **Students, Gen Z and Millennials are leading the double masking trend:** 60% of students, 44% of Gen Z and 51% of Millennials say they are double masking always/most of the time, vs. only 36% Gen X, 30% Boomers and 26% Silent.
- **Black and Hispanics who have been disproportionately affected by COVID are significantly more likely to be double masking right now;** [official data from the CDC](#) shows Black and Hispanics are disproportionately hospitalized and dying from the virus. Today, 58% of Black and 50% of Hispanics say they are double masking always/most of the time, vs. only 36% White and 35% Asians.
- **Does this mean a softening of the mask backlash? Maybe...** Back in July, a third (33%) of Americans told us that mandatory masks are a threat to our rights and freedoms, a sentiment shared across demographics including 45% Republicans, 45% Hispanics, 33% of both White and Black. Today 75% say they support a national mandate making it mandatory to wear masks in public to fight the coronavirus pandemic, according to the [Harvard Harris Poll](#).

Implication:

Messaging on COVID mitigation has been confusing and frustrating and Americans seeking clarity, trust and consistency from leaders in Washington to their local businesses on how to stay safe in the "new normal." This is needed now more than ever as we enter a new and fragile era of COVID with the vaccine roll out and the arrival of new virus variants.

Section:

04

Topic:

WITH VACCINATIONS ON THE RISE, U.S. ECONOMY REMAINS IN THE WAITING ROOM: REUTERS

Introduction:

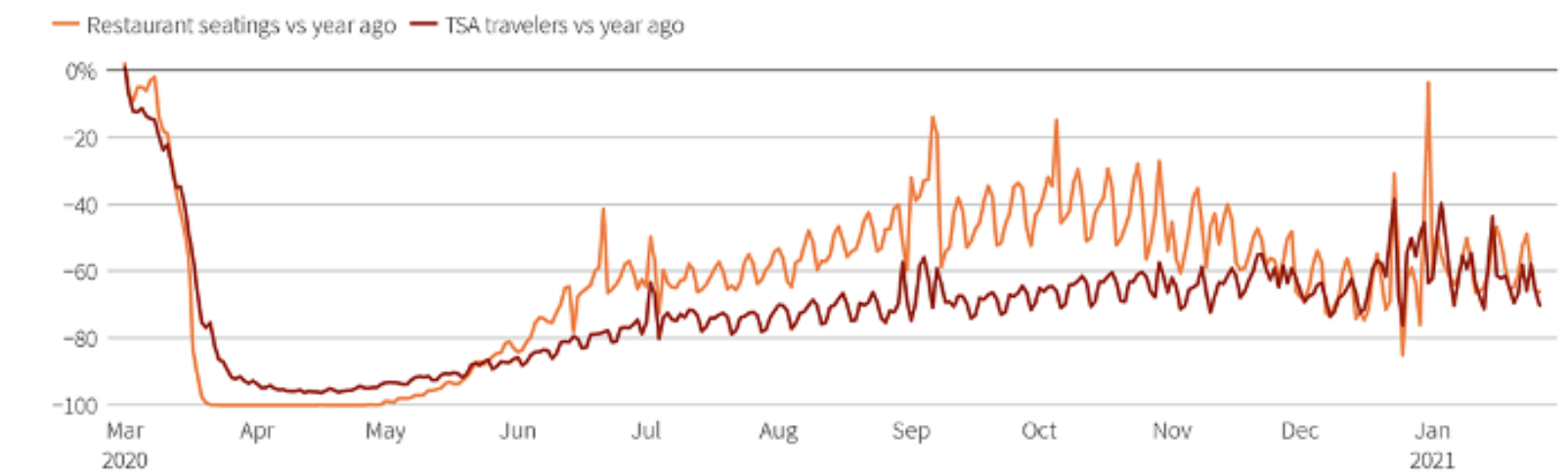
Last week, we contributed our polling data alongside OpenTable, Yelp, and [others to a Reuters article](#) modeling a comprehensive portrait of consumers in a 'wait and see' mode on resuming activities, despite progress on nearly all aspects of the vaccine front.

- In a recent Harris Poll, **30% of consumers said they would not “feel safe” eating indoors at a restaurant until “the country reaches herd immunity” - the point at which the virus cannot spread effectively because so many people are immune.** One-fifth (18%) say they'll feel comfortable after the second dose of their vaccine kicks in, while only 26% are comfortable doing so now.

- **And it's not just dining out for which consumers are waiting until herd immunity to resume:** 40% don't feel comfortable to fly on an airplane and 23% will even wait until herd immunity to visit friends and family without a mask (while 24% will visit friends and family mask-less after they have all been vaccinated, 16% after they personally have been vaccinated, and 22% are comfortable doing so now).
- Daily data on restaurant seatings from OpenTable [here](#) and on airline passengers screened by the Transportation Security Administration have leveled off recently at about 40% below year-ago levels.

The retail recovery in real time

Restaurant seatings and air travel have become the new touchstones for how bad parts of the economy are still ailing, and what coronavirus vaccinations may help fix over time.



Source: OpenTable, TSA

Implication:

However, it's not just the U.S. we have to be concerned about in order to return our economy to normal: The Wall Street Journal puts the global economic impact of the pandemic into perspective: "The U.S. and a few other countries could wind up enjoying many benefits of herd immunity but still be unable to fully mend their economies because they are waiting on other places to catch up. With borders shut globally, some businesses even in vaccinated countries would have to rely on domestic demand."

Section:

05

Topic:

60% OF AMERICANS BELIEVE COLLEGES SHOULD DROP THE SAT: YAHOO FINANCE-HARRIS POLL

Introduction:

Following the news that The College Board is eliminating the SAT essay and subject-specific tests, [Yahoo Finance, together with The Harris Poll, asked 1,000 readers](#) their thoughts on standardized testing and found 60% agree that U.S. colleges and universities should stop requiring standardized test scores for applicants altogether. Here's why:

- **Affluent bias:** 51% of Americans polled agree that standardized tests are inherently biased in favor of affluent students.
- **Racial bias:** most African and Hispanic Americans (61% and 57%, respectively) believe that standardized tests are inherently biased in favor of white and Asian Americans (vs. only 36% of white Americans and 43% of Asian Americans).

- Many Americans (62%) agree that high school **grades are a better measure of a student's college success than standardized test scores**. In addition, 68% of students, and 73% of young Americans between the ages of 18-34 are even more likely to support using grades over test scores.
- Many Americans believe a **more balanced approach must be found** when it comes to measuring college preparedness. Aside from high school grades, which polled at 58%, **interviews** at 49%, **teacher recommendations** at 47%, and **academic/extracurricular awards** at 41%, were the top metrics Americans said should evaluate students instead of standardized test scores.

Implication:

College admissions, like many aspects of American society exposed for inequities during COVID, is overdue for a makeover. Eliminating the SAT essay and subject tests might help simplify testing but bigger changes are needed to solve for deep structural issues like bias.



WAVE 43

WAVE 43 INTRODUCTION

The following research was conducted between **January 22-25, 2020** by The Harris Poll. Fielded among a nationally representative sample of **1,956** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

IS TECH DOING ENOUGH AFTER THE CAPITOL ATTACK? DEPENDS ON WHO YOU ASK: USA TODAY-HARRIS POLL

Introduction:

Have the nation's leading tech companies been doing a good job handling violent threats, hate speech and conspiracy theories after the attack on the U.S. Capitol? [In a survey shared exclusively with USA Today](#), we asked Americans how social media companies are handling the fallout.

- More than a **third (37%) of Americans say they approve of how social media companies are cracking down on potentially harmful or dangerous content**, with 28% saying they have gone too far and 23% saying they haven't gone far enough.
- **Opinions largely split along party lines:** Half (51%) of Democrats saying tech companies were doing a good job, compared with 25% of Republicans.

- **Younger Americans are more likely to approve:** 41% of Gen Z and Millennials and 43% of Gen Xers say social media companies are doing a good job versus 25% of Boomers and 36% of seniors. Older Americans were more likely to say the companies have gone too far, 35% of Boomers versus 22% of Gen Z and Millennials.
- A majority (55%) say it was **necessary for Twitter to remove more than 70,000 accounts** linked to conspiracy theories following the riots; only 31% say it went too far.
- **No trust in social media:** 69% of Americans, including 76% of Republicans and 59% of Democrats, say they do not trust social media - higher than Congress (56% do not trust) or the national media (52%).

Implication:

As our CEO John Gerzema says, "Most Americans saw the actions taken by Big Tech in recent weeks as necessary, but they're still deeply skeptical of the power and influence these companies have."

Section:

02

Topic:

AMERICANS SAY VACCINE SKEPTICISM IS LEGITIMATE

Introduction:

Though nearly three-quarters of Americans (72%, up 12-pts since the first inoculation on December 15th) say they are likely to get a COVID-19 vaccine as soon as they are able to, many Americans (28%) are more hesitant. We asked Americans if they feel hesitation to take a vaccine is reasonable and found most of the public, even those willing to take a vaccine, understand the concerns of their fellow Americans.

- A majority (55%) of Americans say those with **concerns about the COVID-19 vaccine are legitimate**, while only 30% say they are overreacting.
- **What do Americans consider to be reasonable concerns?** Nearly three-quarters (73%) say concern about **side effects** is reasonable, while 61% say concern the **development was rushed too quickly**, 61% say **not knowing what is in it**, and 53% **not trusting the government** to determine if the vaccine is safe are reasonable concerns. Only 34% say it's reasonable for someone to not take a vaccine because the seriousness of COVID is overblown.
- **Those unlikely to get the vaccine say they will “wait and see”:** 39% of the public plans to get their vaccine the first day they are able to; while over one-quarter (28%) say they will wait awhile and see. Interestingly, half (47%) of those not likely to take the vaccine say they will wait it out and see, indicating they aren't entirely “anti-vax”, but are open to going once they feel comfortable. 1 in 10 (10%) say they will get the vaccine when they get around to it, 8% have already received it, and 15% won't go at all.

- **Two-thirds (66%) of Americans say the C.D.C. is doing a good job explaining the safety and any possible risks of the vaccine to the public**, while Dr. Fauci (63% good job), Pfizer (62%), and President Biden (61%) are also viewed as effective messengers. The national media (54% good job) and Trump (36%) less so.

Implication:

America is making steady progress in earning the trust of the public in the safety and efficacy of the available COVID-19 vaccines. However, [Wall Street Journal explores how lack of public confidence](#) in the vaccine in France is eroding the country's vaccination plans.

Section:

03

Topic:

STUDENTS LOOK TO THEIR SCHOOLS FOR THE PATH FORWARD

Introduction:

Just yesterday, C.D.C. officials announced schools can be safe if precautions are taken on campus and in the community. In addition, many university officials [say](#) that lessons from the fall will allow them to bring even more students back onto campus when classes resume for the spring. This weekend, we checked in with students ages 18-24 on all of this and more, here's what we found:

- Majority (68%) of students say **their school is doing a good job of communicating the current state of COVID-19 at their school** and say **COVID-19 policies are just right** (59%) vs. only (22%) who say they're not strict enough and 18% who say they're too strict.
- **Student are looking for trusted sources on the vaccine, and turning to their schools' leadership:** Over a quarter (26%) admit they don't know enough about the vaccine, and many are looking to their school administration first for information on the vaccine (41%) the same amount are looking to their school's health advisory committee (41%).
- **"Don't label us superspreaders":** While many have called out students as [reckless superspreaders](#), 73% say **"some college students are being too reckless** with socializing given COVID-19 that is **giving all students a bad reputation."**
- **On the contrary**, similar amounts show **sincere concern and regard towards the pandemic:** (76%) are concerned about contracting COVID, (63%) are likely to take the vaccine and (74%) recognize they will need to continue to follow safety protocols after vaccination to keep others safe until we reach herd immunity.

- All of this is adding to the **mounting pressure on students' mental health** and they're calling for change; 78% say "we need new resources to address mental health issues during COVID-19 because current resources are not enough."

Implication:

Transparency is the foundation of Gen Z's ethos, and they're calling attention to critical issues that are impacting Americans of all ages, such as lack of knowledge on the vaccine, mental health and racial inequality. We must continue to listen to students, especially during this critical time as campuses start to reopen amid the vaccine roll out, if we want holistic healing.

Section:

04

Topic:

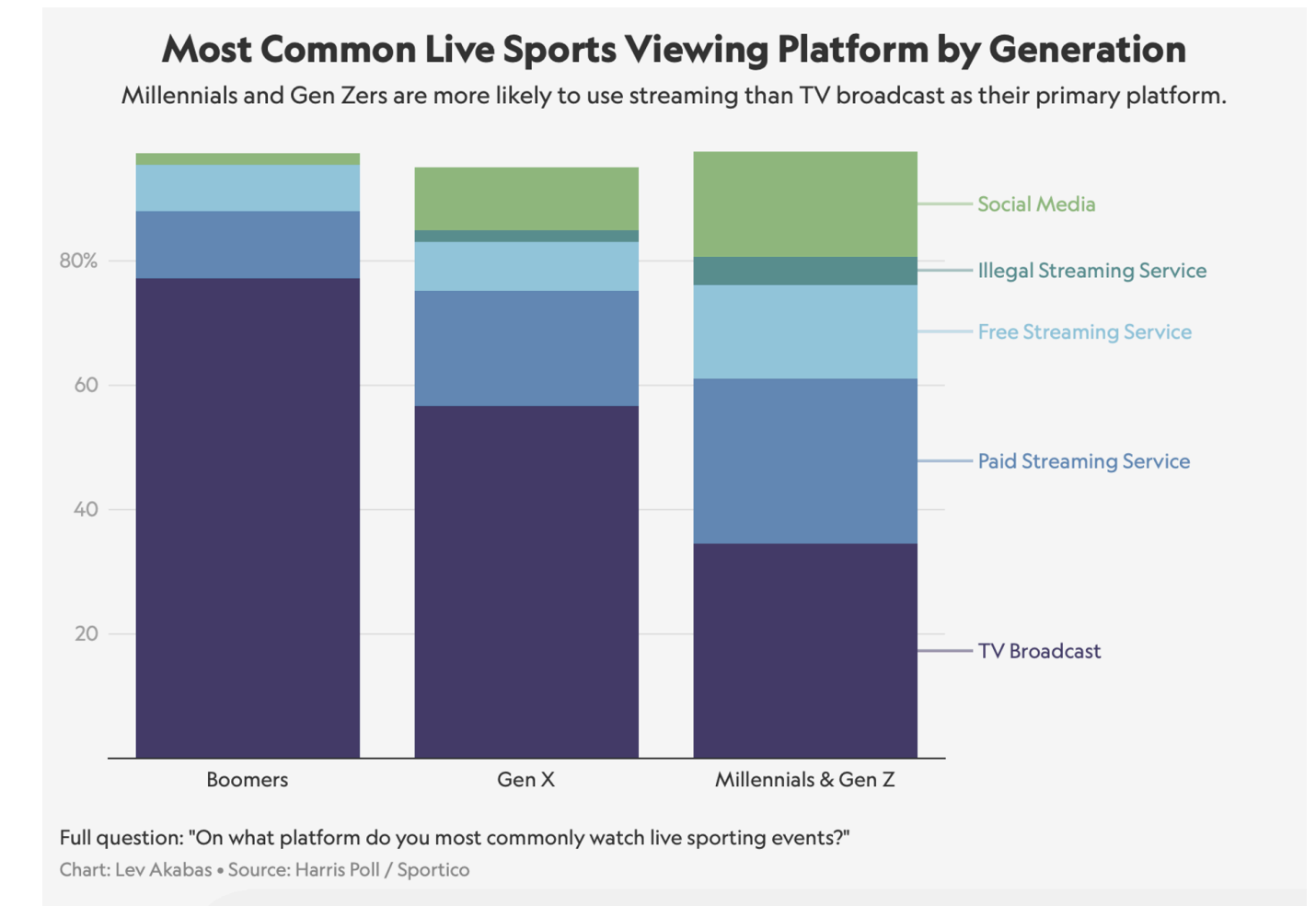
STREAMING PREVAILS FOR GEN Z AS BOOMERS SUSTAIN LINEAR TV DOMINANCE: SPORTICO-HARRIS POLL

Introduction:

In a partnership with Sportico, Harris Poll surveyed Americans on their sports viewing habits. The data reveal that more Millennials (ages 25 to 39) and members of Gen Z (younger than age 25) use streaming rather than television broadcast as their most common platform for viewing live sporting events.

- **The generational divide is stark:** among those who watch live sports, more than three-quarters (77%) of Boomers most commonly watch a TV broadcast, as compared to 57% of Gen X and just 35% of Millennials and Gen Z.
- **Television is not obsolete:** half (51%) of the public watches live sports on TV broadcasts—but many use alternative platforms even if TV is their primary outlet. Nearly a quarter (24%) of all consumers watch on a paid, official streaming service, while 21% watch on a free, official streaming service and 19% watch on social media.

- **Some younger fans are eschewing larger screens entirely:** 64% of Millennials watch live sports on a television, a hefty 41% watch on their phones. A similar ratio exists among Gen Zers (48% to 31%). Notably, the three groups of sports fans we analyzed—boxing, NFL and NBA fans—were each more likely to watch sports on a phone than on a computer or tablet.



Implication:

CBS's successful Nickelodeon NFL broadcast last weekend may spawn similar experiments in engaging the younger audiences through TV, but at some point leagues may have to make more radical changes than end-zone slime eruptions and meet Gen Z fans where they are; that is to say, not on their couch in front of a television.

Section:

05

Topic:

AMERICANS OVERWHELMINGLY SUPPORT STUDENT DEBT REFORM

Introduction:

[In a new Harris Poll](#), we found that Americans overwhelmingly support multiple reforms for the student loan debt crisis. This may present a perfect opportunity for Biden's administration to fix a long-time national issue, and what's more, the majority of Americans agree he's up to the task.

- **Frequently recommended solutions are supported by more than half of Americans:** forgiveness of a flat amount of student debt (64%) and forgiveness of all student loan debt (55%). Additionally, nearly two-thirds of Americans (63%) support forgiveness of all student loan debt for those working in certain industries like health care, science & technology, or public service.
- **Support is high for other potential solutions including** lower interest rates on students that attend public universities (83%), automatic student loan forbearance if someone loses employment (72%), and updating bankruptcy laws to get rid of student debt (66%).
- Even though only (17%) of Americans think the president should have the primary responsibility for fixing the student loan debt crisis, **57% of Americans agree that the incoming presidential administration is capable of fixing the student loan crisis.** In fact, 53% of Americans agree that the Biden administration will fix the student loan crisis within the next four years.

Implication:

[In an article citing our data](#), Axios dives into the complications of student loan reform, noting "there's a growing consensus among Americans who want President Biden to cancel student debt — but addressing the ballooning debt burden is much more complicated than it seems."



WAVE 42

WAVE 42 INTRODUCTION

The following research was conducted between **January 15-17, 2020** by The Harris Poll. Fielded among a nationally representative sample of **1,960** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

PRESIDENT BIDEN SEES HIGH SUPPORT FOR INITIAL AGENDA

Introduction:

Today, Joe Biden was sworn in as the 46th President of the United States and has taken over trying to get America back to a semblance of normal. We asked Americans if they support or oppose key items in the new president's initial policy agenda and found that most Americans - including half or more of Republicans - support the policies.

Stimulus: Biden sees the highest support for (78%) providing \$175 billion in low-interest loans to small businesses, while (76%) support passing an additional \$1,400 stimulus checks. Three-quarters (75%) of Americans support expanding tax credits for low- and middle-income families, including 69% of Republicans vs. 83% of Democrats.

Protecting Americans: Just under three-quarters support extending the eviction and foreclosure moratorium (74%) and requiring all employers to offer paid sick leave until after the pandemic (72%).

Reopening schools: Over two-thirds (68%) support providing \$170 billion to help schools reopen in the pandemic, including 77% of Democrats and 63% of Republicans.

Two-thirds (66%) support raising the minimum wage to \$15 per hour and (65%) ending the lower minimum wage for tipped workers. Half (50%) of Republicans support raising the minimum wage, the lowest level of Republican support for any of these policies (vs. 82% of Democrats).

Implication:

[The Wall Street Journal details](#) what - and how - President Biden hopes to accomplish in his first 100 days. As they put it, Biden will take office "this week with a far-reaching set of plans for his first 100 days, but he must grapple with narrow Democratic majorities in Congress and an unsettled country as he seeks to roll back some of his Republican predecessor's policies and curb the pandemic."

Section:

02

Topic:

MARKETING IN THE MOMENT: AMERICA'S (FLUID) EXPECTATIONS FOR COMPANIES

Introduction:

As America faces the COVID-19 pandemic against the backdrop of social, economic, and political turmoil, marketers face communicating to divided and distraught consumers where authenticity, safety, and hope is now more important than ever.

Most Americans (77%) say it is important for brands to acknowledge COVID-19 in television and digital advertising - such as stressing the importance of masks and limiting social gatherings.

Consumers approve of COVID precautions, diversity, and unity in advertising: 57% say any **participants in an advertisement should be wearing masks** and socially distanced, and the same amount say, "advertisements should take extra care to portray actors who **represent diversity**." More than two-thirds (68%) say "messages should strive to **stress national unity and togetherness** where appropriate."

Americans want companies to take an active role in the vaccine rollout: 65% want to see companies advertise to encourage consumers to take the COVID-19 vaccine, while even more - 79% - say companies should be providing customers with reliable information about the vaccine.

Marketing in a Divided America - Peril and Promise: Four in 10 (42%) say brands should use their voice and advertising dollars to denounce misinformation and stress the importance of facts. Though what qualifies as "misinformation" may have a political lens: 54% of Democrats say brands should do this vs. only 29% of Republicans. Meanwhile, 54% of Republicans say "Companies should stay out of politics entirely and stick to only talking about their brand" vs. 24% of Democrats and 37% of all adults.

Brand Safety Now Takes On Heightened Risk After January 6th: 60% of consumers would **stop using a product after viewing the brand's advertisement next to false**, objectionable or inflammatory content (e.g., conspiracy theories/misinformation, political violence or extreme political views) and 51% would tell their friends to follow suit.

Implication:

Consumers are looking for leadership where the government has failed them: 66% say "Companies could do a better job than the government handling the logistics of administering the COVID-19 vaccine," and all companies have a unique role to play, and the time to act is now.

Section:

03

Topic:

HARRIS POLL AT CES 2021

Introduction:

At CES 2021, marketers gathered to discuss pandemic-related trends - and what to expect next. Harris Poll CEO John Gerzema spoke with Mastercard's Cheryl Guerin about recent joint-polling data on consumer behavior, which was covered in-depth by [Kathryn Lundstrom at AdWeek](#):

Touchless is here to stay: With 41% of global transactions being carried out using contactless tech, 74% of Americans say they plan to continue using contactless even after the pandemic is over, said EVP of North America Marketing and Communications for Mastercard, Cheryl Guerin.

A continued focus on health and wellness (The Betterment Boom): Looking ahead, Gerzema said polling data indicates that consumers, especially the younger cohort, are demanding a stronger focus on mental health within the wellness space. In fact, 82% of teens say, "It's time for Americans to talk more openly and honestly about mental health issues in this country" and across all American adults, 43% plan on being more connected to friends and family after the pandemic, 42% plan to be more active and 31% are going to change their career path.

Get ready for post-pandemic 'revenge spending': Guerin said that based on data from the recent poll, consumers are anxious to start spending on the things they've been denied over the last year—like travel, dining and in-person entertainment. More than half of American consumers have put away some money this year, Gerzema said, calling savings "the biggest enemy of consumption this past year." At this point, those savings are burning holes in the pockets of American consumers. "There's a savings dam that's about to burst," Gerzema said.

Calendar reshuffling will continue through 2021: Event cancellations were the name of the game in 2020 and continue to upend the cycles and seasonality of sports and business as in-person gatherings remain inadvisable for the time being. That's likely to continue throughout 2021, said Gerzema. "The implication here is: don't think in conventional timelines," said Gerzema. "Marketers need to be agile."

Implication:

COVID has upended how we work, play, discover, consume, and transact. But looking through the marketer's lens, we see that trends aren't being disrupted so much as they are accelerating in a direction anticipated pre-COVID.

Section:

04

Topic:

47% OF AMERICANS SAY VACCINATIONS ARE MOVING TOO SLOWLY: AXIOS-HARRIS POLL

Introduction:

Americans aren't thrilled with the vaccine rollout so far, [according to new Harris Poll data shared exclusively with Axios](#).

Just under half (47%) of Americans say the vaccine rollout is moving too slowly, with Democrats (52%) being more pessimistic than Republicans (41%). Only 27% **say it is going about right**, while 11% say it is moving too quickly.

Among those who feel it's going too slowly, there's a sharp partisan divide over who is at fault: **60% of Democrats say President Trump is to blame**, while a plurality of **Republicans (36%) say state governments** are the problem.

Some optimism: 69% of Americans say they are likely to take the COVID-19 vaccine, the highest percentage other than the first time we asked in April 2020 (when 73% said they would take the vaccine).

Among people who said they weren't likely to get vaccinated, some of the most common reasons included **fear of side effects (55%)**, **concerns about the fast development process (45%)** and **believing it won't work (36%)**.

Implication:

The Biden administration will take over right in the midst of one of the most complex and highest-stakes logistical efforts the country has ever seen — and getting it right will be both a political and public-health imperative.

Section:

05

Topic:

ACTUALLY, AMERICANS ARE FEELING BETTER THAN YOU THINK THIS WINTER: FAST COMPANY- HARRIS POLL

Introduction:

With so much bad news swirling around—COVID-19, politics, racial injustice—you'd think Americans would be throwing up their arms and gobbling down ice cream. [In an exclusive survey with Fast Company](#), we check in to see how Americans are feeling in the new year.

New year optimism: Three-quarters (75%) say they're feeling about the same or better in 2021 compared to how they felt previously during this time of year.

And people who normally contend with seasonal depression are twice as likely to say they're feeling better this year versus previous years - 32% compared to 16%.

Eight in 10 (79%) Americans report feeling their **sense of purpose in life is stronger than or about the same as this time last year** (though individuals with seasonal affective disorder were twice as likely to have weaker senses of purpose).

Since the start of the pandemic, The Harris Poll has been monitoring the various emotions Americans are experiencing: 70% feel thankful, 70% feel appreciative, and 66% feel compassionate while only 50% feel angry.

Implication:

In the article, happiness research Gillian Mandich reflects: "People are developing self-awareness and emotional intelligence, the ability to really reflect. Pre-COVID, for a lot of people, life was go-go-go. When the world shut down, people received this gift as a silver lining."



WAVE 41

WAVE 41 INTRODUCTION

The following research was conducted between **January 8-10, 2020** by The Harris Poll. Fielded among a nationally representative sample of **1,951** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

TWITTER'S TRUMP BAN AFTER DEADLY CAPITOL ATTACK SUPPORTED BY MOST AMERICANS BUT NOT MOST REPUBLICANS: USA TODAY-HARRIS POLL

Introduction:

Most Americans, but not most Republicans, support Twitter's permanent suspension of President Donald Trump after the deadly U.S. Capitol siege, according to our latest survey shared exclusively with [USA TODAY](#).

- A majority of Americans (61%) said they **agreed with Twitter's decision to ban Trump** over the risk the president would use the platform to incite further violence, while 39% opposed it.
- But in a vivid representation of the nation's **raw divisions**, opinions split along partisan lines, with 36% of Republicans supporting the ban versus 80% of Democrats and 59% of Independents.
- The removal of Trump's Twitter account has **sparked censorship concerns** among Republicans. More than a third of Americans (36%) said they were concerned about censorship, including 63% of Republicans and 20% of Democrats. And 4 in 10 (42%) also agreed with the statement "I am concerned that Twitter permanently suspending President Trump sets a dangerous precedent with technology companies censoring free speech and government officials."
- On the other hand, 69% said social media companies should be able to remove users they consider dangerous, even if it's the president of the United States. And 40% say Trump should have been banned earlier and described **Twitter's removal as "too little, too late."**

Implication:

"Americans were outraged by what they saw at the Capitol last week, and they're looking for leadership from the business community. In the absence of action from political leaders, they see a Twitter ban as a reasonable step -- and one that will hopefully prevent future dangerous situations." - Harris Poll CEO, John Gerzema

Section:

02

Topic:

BIDEN CAMPAIGN POLICIES ON BRANDS; CAMPAIGN US WEBINAR

Introduction:

On Tuesday, Harris Poll's Tawny Saez, Director and Cultural Anthropologist, joined Campaign US [Virtual Brunch Briefing](#) to discuss how President-Elect Biden's policies could impact brands, agencies and media owners based on Harris' latest polling data. Here are some of the highlights:

- **A majority are optimistic** about how Biden will address COVID (63%), the economy (59%), and racial inequality (58%). Meanwhile, optimism is divided **across the aisle**; democrats are more than 2x likely to be optimistic across all issues.
- Americans are calling on Biden to enact **stronger government intervention to address COVID** compared to the previous administrations' approach that left states to fight the pandemic largely alone. This includes drastic enforcements such as mask mandates (75%), COVID testing (73%), bans on gatherings (66%) and even mandating people to get the vaccine (56%).
- Americans have most confidence in Biden's ability to **distribute the vaccine rapidly** (64%), which is critical as 32% are skeptical of getting the vaccine, especially BIPOC (45% Black; 38% Hispanic; 31% Asian vs 29% White).
- The majority are **hopeful Biden will heal deep cultural divides** (59%), but we are living in a divided world where outlook is tied to party affiliation; there is 40-point gap of optimism between democrats (62%) and republicans (16%) and a 27-point gap of hopelessness between Republicans (33%) and Democrats (6%).

- **Now is the time for brands to act, and consumers say they will remember:** 72% say "I will remember the companies that took missteps in their response to the issues related to the COVID-19 pandemic, economic security of their workforce, or racial injustice long after this is over." But they are giving companies an opportunity; while 82% say "This is an **opportunity for large companies to hit the "reset" button and focus on doing right** by their workers, customers, community and the environment."

Implication:

Americans are optimistic about the incoming Biden Administration, but a lack of transparency from leadership to-date has seeded mistrust, skepticism and division. To stay relevant, brands will need to adopt new forms of communication that speak to diverse consumer values that engender trust through accountability and action.

Section:

03

Topic:

WE'VE GOT A LONG WAY TO GO

Introduction:

This week, we looked at where consumer sentiment is at this stage in the pandemic by asking Americans how comfortable they currently are to do activities that were part of everyday life before the pandemic. What did we find? We still have a long way to go until Americans are comfortable enough to live a normal life.

- **At the moment, Americans are not comfortable socializing:** 62% are not at all comfortable attending a large sporting event or concert, while 56% are not comfortable going to an indoor party, 43% are not comfortable going out to dinner or drinks indoors; and 38% are not comfortable visiting friends or family without a mask.
- **And a return to normal will rely on comfort in the customer journey, which we are still a long way away from:** 56% are not at all comfortable shopping in a store without a mask, 55% are not comfortable flying on a plane, 55% are not comfortable taking public transportation, and 43% are not comfortable staying in a hotel.
- **But there is some optimism:** 4 in 10 (43%) are confident we will reach herd immunity and “return to normal” sometime in the summer 2021. Younger Americans (50% of Gen Z/Millennials and 52% of Gen X) are the most optimistic about a return to normal, while 35% of Boomers and 31% are not so confident.
- And as COVID now rampages through much of rural America, it is **Urbanites (54%) who are most optimistic about a return to normal this summer** (vs. 36% of Rural Americans and 37% of Suburbanites).

Implication:

Even as [Dr. Fauci assured people last week that the end is in sight](#) and crowded events can return “sometime in the fall of 2021”, the overwhelming majority of Americans are still hunkering down as we brace for what is to come (66% say the worst is still ahead of us). To make consumers feel more comfortable, brands will need to stay ahead of consumer expectations, such as [Uber who is partnering with Moderna](#) to build ride scheduling into vaccine appointments.

Section:

04

Topic:

MOST AMERICANS PLAN TO USE TELEHEALTH AFTER THE PANDEMIC: MEDCITY NEWS-HARRIS POLL

Introduction:

One of the biggest questions of COVID seems to be, what aspects of American life are changed forever? When it comes to healthcare, it looks like some new virtual habits adopted during the pandemic might be here to stay; 65% of people plan to continue to use telehealth after the pandemic ends according to our latest survey covered exclusively by [MedCity News](#).

- **Expect a hybrid of telehealth and in-person care:** If given the option between a telehealth visit or an in-person visit, 42% would choose a combination of in-person and virtual care. Most people (44%) still preferred in-person visits, and relatively few respondents (15%) said they would opt for telehealth services alone.

- **Age matters:** Half of people ages 35-49 said they'd prefer a combination of both, while 66% of people ages 65 and up said they'd choose in-person visits.
- **Telehealth = convenience:** Most people wanted to use it to ask medical questions, including 62% of people over age 65. Other popular uses were for reviewing lab results and getting prescription refills.
- **But in person care is still important for sensitive matters:** Fewer people said they would use virtual visits for regular checkups, therapy or when their child is sick.
- Despite 76% of people saying they would miss in-person visits if their primary care physician moved mostly to telehealth, half of respondents under age 50 said they would **consider replacing primary care with doctors on demand via telehealth**. And even 35% of the general population said they would consider this if they could access most of their regular appointments via telehealth.

Implication:

The pandemic has served as an accelerant to shifts that were already happening and will continue – it's critical to be “touchless” ready across all channels – physical and digital. This is part of the larger rise of safety as a customer journey we're seeing; brands that find the right balance of touchless, yet with a human touch will definitely emerge as winners.

Section:

05

Topic:

THE PANDEMIC IS TAKING A TOLL ON CHILDREN'S MENTAL HEALTH

Introduction:

This week CEO Will Johnson co-wrote [an op-ed for Business Insider](#) based on a survey that found that while children are less likely to get COVID or experience severe symptoms, they have not been shielded from the effects of the pandemic.

- **School-aged children are socially isolated**, with only 16% of those 18 and younger having gone back to school this fall. On top of this disruption, 10% of them have had a COVID-19-related death in the family, 18% had a parent lose a job, and 45% had parents suffer a drop in income.
- Since COVID-19 hit, **mental illness symptoms have increased in school-aged children**. According to their parents, one in seven kids has been quick to anger, has trouble concentrating, and has low energy. This jumps even higher when considering households with incomes below \$50,000 per year to 40% of children displaying these symptoms.
- **Children are suffering**: Parents consider one in eight of their children's mental health (13%) as poor or fair today.
- However, **fewer parents say they're seeking mental health treatment** for their children or think treatments are effective. 1 in 10 (11%) children now have parents who say therapy is not very or not effective at all, and 10% have parents who say drug treatment is not very effective or doing no good at all.

Implication:

As Will stresses, “decision-makers need to recognize the impact of school closures on the well-being of our children and prioritize returning children to the classroom, to reduce the social isolation that surely is exacerbating children's mental health issues.”



WAVE 40

WAVE 40 INTRODUCTION

The following research was conducted between **December 28-30, 2020** by The Harris Poll. Fielded among a nationally representative sample of **1,967** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

A NEW YEAR COVID CHECK-IN

Introduction:

Many hope the year 2021 will bring the long-awaited “return to normal” as vaccine distribution ramps up. As we continue through the worst of it with deaths surpassing 356,000 Americans, we checked-in with how Americans are feeling about the pandemic these winter months.

- After three weeks of seeing healthcare workers receive COVID-19 vaccines, **Americans are becoming more comfortable with receiving it themselves: those very likely to get the vaccine as soon as it is available increased 10-pts**, from 26% on 12/13 (the day before the first vaccines were administered in the U.S.) to 36% this past weekend.
- **However, Americans still see a long road ahead:** more than three-quarters (76%) are concerned to leave their home for essential errands and 78% are concerned about another wave, while half (49%) fear they may lose their job and 51% fear they could die from the virus.
- **Despite the vaccine and a horrific December**, two-thirds (67%) of Americans say the worst is still ahead of us for COVID, unchanged from 66% on October 24th. Seniors, especially, are concerned about the future: 85% say the worst is ahead of us vs. only 60% of Gen Z/Millennials.
- **And consumers don't plan to resume most normal activity for half a year or more:** 49% say it will be more than 6 months before they will fly on a plane; 48% before they go to a sporting event; 43% before they will go to a party; 40% before they go to the movies; and 27% before they go out to dinner.

Implication:

We may be in the new year, but we are still in the darkest days of the pandemic with a long way to go before we recognize any semblance of normal. Americans may be growing weary of social distancing, but most still see ‘normal’ as a far-off dream.

Section:

02

Topic:

THE WORKERS WHO WON IN THE PANDEMIC – AND THOSE WHO LOST: YAHOO FINANCE-HARRIS POLL

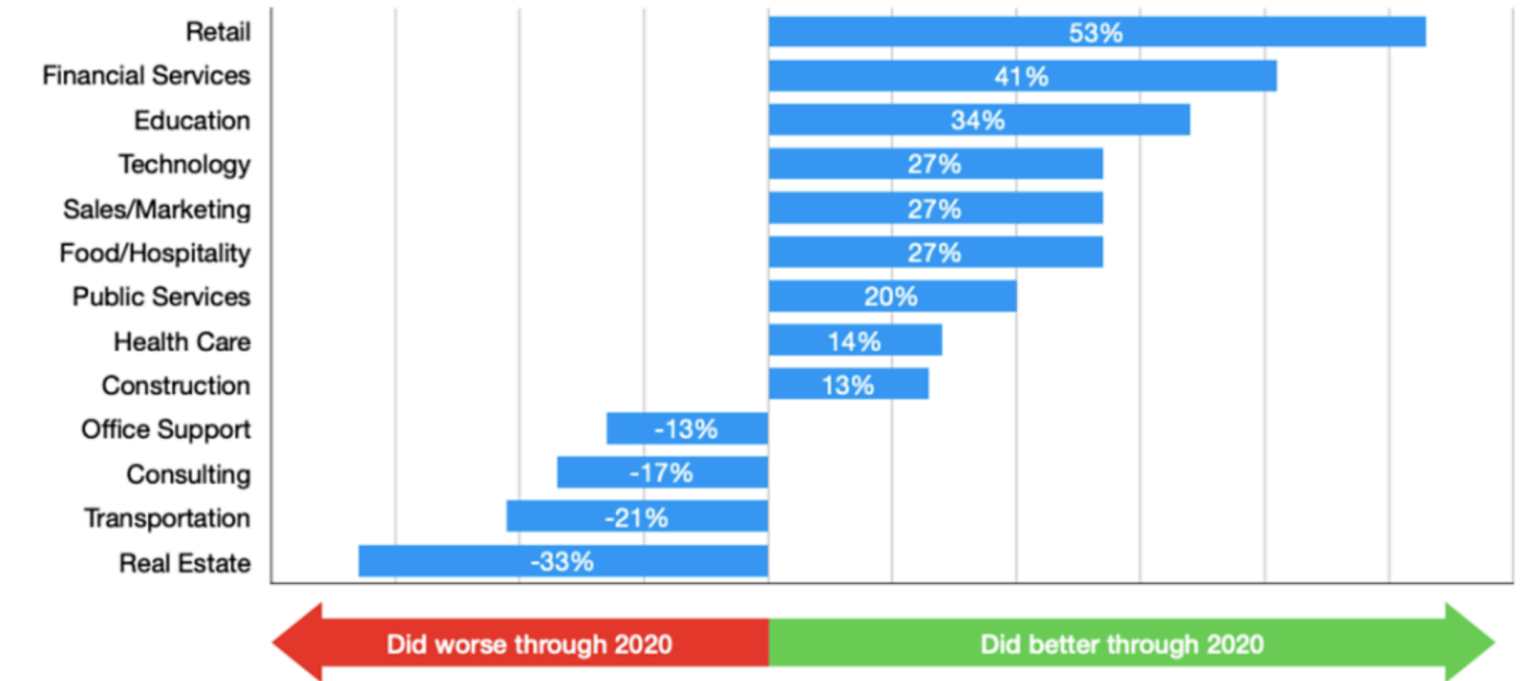
Introduction:

Last week, a new The Harris Poll survey in collaboration with Kumanu and [featured in Yahoo Finance written by CEO Will Johnson](#) reveals which workers are entering 2021 doing better or worse by four measures - financially, mentally, physically and existentially - by 13 job sectors. What did we learn?

- **Reporting better overall health were workers in construction, education, financial services, retail, sales and marketing, and tech.** The biggest gains in physical health were in construction — 58% feeling better and 10% feeling worse — while the biggest improvements in mental health were in sales and marketing, with 56% reporting feeling better and 13% feeling worse. Those in tech stand out, too, with 51% ending up physically and 54% mentally.
- **Those saying they're entering 2021 in sharply worse health are in health care, consulting, office support and real estate.** Four in 10 in consulting and real estate say their physical health has declined, and over 70% in real estate say they're in poorer shape mentally.

- **Feeling less purpose at work, on the other hand, are employees in construction, consulting, food and hospitality, office support, public services, real estate, retail, and transportation.** Fully a third in real estate and 21% in consulting say they're getting less from their jobs than they did before the corona crisis.

Employee perception of financial changes since the COVID-19 pandemic by occupation
Harris-Kumanu Purpose Poll December 2020



Employee perception of financial changes since the COVID-19 pandemic by occupation. (The Harris Poll)

Implication:

The new year probably will be different for many Americans as vaccines enable people to return to work and social behaviors they've had to shun. We can't say when the pandemic will end. But there's one thing we can confidently predict about this new normal: We won't all share its benefits equally.

Section:

03

Topic:

MOST PEOPLE WOULD BE HAPPY TO NEVER SHAKE YOUR HAND AGAIN: FAST COMPANY-HARRIS POLL

Introduction:

Despite a yearning for the normalcy of pre-pandemic times, there were some changes wrought by the coronavirus era that Americans would like to preserve. [In a survey conducted exclusively for Fast Company, The Harris Poll](#) asked which COVID trends Americans hope will continue after the pandemic subsides. What did we find?

- **Wave goodbye to handshakes:** 30% of respondents said they'd like to shake hands with other people less often than before the pandemic, and 26% said they wouldn't want to do it at all. Overall, 54% agreed with the statement, "I would be happy to never shake someone's hand again."
- **Business travelers want to stay grounded:** A total 40% of respondents said they want to resume business travel less often, or never again after the pandemic. Overall, 51% said they would probably travel only "a few times a year" for business.

- **People want to go back to the office, just not all the time:** two-thirds (66%) agreed that they would prefer "a mix of in-office and remote work" after the pandemic.
- **Zoom won't lose too much steam:** 20% said they would like to attend more video get-togethers with family and friends even after the pandemic, and 26% said they'd keep doing them in the same amount.

Implication:

The pandemic will accelerate many trends that were slow-moving but inevitable, such as a virtual meetings and e-commerce, while also bringing about many we wouldn't have anticipated just a year ago - such as the handshake.

Section:

04

Topic:

MARIJUANA IS REPLACING ALCOHOL FOR NEARLY HALF OF CANNABIS CONSUMERS

Introduction:

Last month, [a new survey conducted by The Harris Poll on behalf of Curaleaf and featured in Forbes](#) looked into how consumers are turning to cannabis during the pandemic as a way to escape the stress - often at alcohol's expense.

- Almost half of cannabis consumers age 21 and up have replaced or reduced their alcohol consumption with marijuana since the beginning of the coronavirus pandemic, and one-third of those who use cannabis recreationally prefer cannabis to drinking alcohol.
- Four in 10 (42%) cannabis consumers said that they had either started or increased their consumption during the pandemic, **while 45% said they had replaced or reduced alcohol use with cannabis.**
- Among those who said they had increased their cannabis consumption since the start of the pandemic, 54% said that they did so **to reduce stress and anxiety**, 50% to help them **relax**, and 48% said they did so to help them **sleep.**
- Of those who said they use marijuana recreationally, a third (33%) said that they prefer cannabis over alcohol.

Implication:

“Since the start of the pandemic, we have seen an increase in new consumers at our dispensaries [...] and the increasing diversity among consumers who enjoy it will continue as the general public become more interested in incorporating cannabis in their health and wellness routines,” said Joe Bayern, president of Curaleaf.

Section:

05

Topic:

AMERICANS AREN'T (TOO) CONCERNED OVER VACCINE ALLERGIC REACTIONS

Introduction:

As more and more Americans receive a COVID-19 vaccine, some will experience an allergic reaction. Are Americans concerned that news of recipients having an adverse reaction makes the vaccine too big of a risk?

- Unknown side-effects are one of the reasons Americans remain skeptical of receiving a COVID-19 vaccine: **more than three-quarters (78%) of Americans are concerned about potential side effects of a COVID-19 vaccine.** Just under half (42%) have heard about people who have received a COVID-19 having an allergic reaction.
- **Americans are evenly divided over whether hearing about allergic reactions has an impact on their likelihood to get the vaccine:** 50% say they are less likely to get it, while 50% say it doesn't have an impact.
- **Age - and likely how threatening COVID itself can be - plays an important role when deciding to take the vaccine:** while only 29% of Seniors say news of allergic reactions makes them less likely to receive a vaccine, 38% of Boomers say they are less likely, 59% of Gen X and 68% of Gen Z/Millennials.

- **Fuel for Vaccine Skeptics:** One-third (32%) of the public say its cause for concern, while (49%) say it is a normal part of receiving a vaccine. Nearly half (47%) of those not likely to get the vaccine say its cause for concern (vs. only 23% of those who are likely to get the vaccine).

Implication:

[STAT News reports](#) how last month the CDC said “people who have experienced severe reactions to prior vaccines or injectable drugs can still get the Pfizer/BioNTech vaccine for COVID-19, but should discuss the risks with their doctors and be monitored for 30 minutes afterward.”



WAVE 39

WAVE 39 INTRODUCTION

The following research was conducted between **December 11-13, 2020** by The Harris Poll. Fielded among a nationally representative sample of **2,002** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

NEW YORK TIMES DEALBOOK - WHO'S ON BOARD WITH NASDAQ'S DIVERSITY PUSH

Introduction:

Earlier this month, DealBook broke the news that Nasdaq asked the S.E.C. for permission to set diversity and inclusion requirements for the more than 3,200 companies listed on its stock exchange: have at least one woman and one director who identifies as L.G.B.T. or from an underrepresented ethnic group - or face consequences. Last week, [DealBook](#) followed-up featuring our data on how Americans feel about the requirement.

- **Most American investors agree with Nasdaq's plan:** More than half (55%) agree with the plan: about 22% of those polled strongly agreed with the plan, while 33% percent somewhat agreed. The general public followed a similar pattern.
- About 4 in 10 (37%) of people were close to guessing how many companies already met the proposed guidelines (**it's less than a quarter**). One-fifth (18%) guessed there were less than 10% of companies meeting the requirement.
- **But investors are somewhat split on whether it will work.** About a third of respondents said they were hopeful that the proposal would "create any change in diversity and inclusivity," while 27% said they were annoyed by the imposition.

- **There is a clear political divide:** 7 in 10 (71%) of Democrats agree with the requirement vs. only one-third (35%) of Republicans.

Implication:

Harris Poll CEO John Gerzema weighs in: "Investors are skeptical (25%) and annoyed (27%) with Nasdaq's diversity requirement. Investors might be cynical of driving change in a polarized government (given the party divide on this issue) and dubious of moving the needle for so many companies, given less than a quarter of companies on the stock exchange currently meet diversity standards."

Section:

02

Topic:

WOULD YOU RELOCATE FOR YOUR JOB?

Introduction:

Tech-giant Oracle recently announced they were moving their headquarters from Silicon Valley to Austin, TX - the latest in a string of tech companies relocating to a cheaper area of the country, from Palantir Technologies moving to Denver, CO and Hewlett Packard Enterprise moving to Austin, TX. We asked Americans if their employer moved - would they follow?

- **Should I stay or should I go?** Over half of Americans (54%) say they would be more likely to look for a new job rather than relocate if a company they worked for relocated their position to a different state; 46% say they would relocate to the new state.
- If companies allow a **permanent work-from-home option**, half of Americans (51%) say they would be **likely to relocate elsewhere**.
- **Where would remote workers choose to work from?** Half of Americans (50%) would choose to relocate closer to family and friends, while 45% would be near a beach. One-third (31%) of Gen Z/Millennials and 33% of Gen Xers would move to a large urban city (vs. 20% of Boomers) and 29% of Parents would move to be in a good school district (vs. 15% of Non-Parents).
- **Show me the money:** Nearly three quarters of Americans (72%) would be likely to relocate if a company they worked for offered them a monetary incentive.
- **Cost of living adjustment:** Nearly 4 in 5 Americans (79%) agree that if a company relocates a worker to another city or state, their salary should be adjusted based on where they will be living and the cost of living in that area.
- **Stripe recently offered** its employees \$20,000 to relocate away from New York City, Seattle, or San Francisco ... but it came with a 10% pay reduction.

Implication:

[The Economist](#) weighs the cost and benefit of the relocation exodus: "Telecommuting offers other potential cost savings, and not just the reduced need for office space. Remote workers do not need to live in big cities where property is expensive. [...] Remote employees are, in essence, competing with a global workforce and are thus in a much weaker bargaining position."

Section:

03

Topic:

“SURVEY: AMERICANS THINK BIG TECH ISN'T SO BAD AFTER ALL” HARRIS CEO WILL JOHNSON IN TECHCRUNCH

Introduction:

Last week, CEO Will Johnson wrote an [op-ed for TechCrunch](#), based on our survey of 2,069 representative adults in the U.S., that found while American adults overwhelmingly side with the House Judiciary Committee's findings on Big Tech, Americans just as overwhelmingly tell us their favorite providers are not monopolies at all. Here are a few highlights:

- **The COVID-19 pandemic has only increased loyalty.** Cooped-up day after day, half of American adults say they're streaming more video than they did a year ago, for instance, while a third are shopping more online. If consumers are feeling abused by Big Tech — and more than half do say big tech companies fail to always do right by their customers — **they're not riled up enough to click elsewhere.**

- American consumers also **don't feel like captives without options.** Although 55% of Americans agree that Google has too much power and should be severed from YouTube and Gmail, 4 out of 5 Americans say **there are adequate alternatives.**
- Despite Big Tech's market dominance, American consumers **don't think these companies are hurting their rivals**, either. Though three-quarters of Americans see Amazon, Apple, Google and Facebook as monopolies, four of five people say **tech giants promote innovation in their industries** and two-thirds say these companies **promote competition and enhance the nation's global reputation.**

Implication:

When we separate Americans' narrow take on individual companies from their perceptions of the digital realms consumers inhabit daily, we see little reason for the federal government to blow up Big Tech. Another cautionary finding: Barely half of the representative American adults in our poll even think regulators and lawmakers are the right groups to determine whether a company is too big.

Section:

04

Topic:

NEW POLL SHOWS THE 'OUTSIZED' FINANCIAL BURDENS FACED BY MILLENNIALS - YAHOO FINANCE

Introduction:

Our [latest research](#) with [DailyPay](#), the Bipartisan Policy Center Funding Our Future campaign, and The Center for Financial Security at the University of Wisconsin found that Millennials are being especially impacted financially by the pandemic.

- Over half of Millennials (52%) say their **savings have declined** during the pandemic with 44% saying they have either **no savings at all** or don't currently have enough to cover an emergency expense of \$400.
- A third of Millennials expect they'll need to **continue to work into their 70s** based on a lack of saving. Only one-third (35%) of Millennials say they're on the right track to meet their retirement goals.
- When it comes to student debt, 66% of respondents believe the **government should forgive at least some federal debt**. President-Elect Joe Biden is under increasing pressure to do just that once he is inaugurated next month.

- **But these effects are uneven:** The survey also showed a divide with a quarter of young people suggesting that their **savings have actually increased during the pandemic** while 29% of those with only a high school education say they have no savings at all.

Implication:

"An economy that was already difficult for young workers is getting even more challenging in some critical ways" noted Matthew Kopko, Vice President of Public Policy for DailyPay. "This data shows the resilience of younger generations in the face of the second major economic shock of their financial lives," added J. Michael Collins of the Center for Financial Security, referring to this year's pandemic and the Great Recession of 2007-2009.

Section:

05

Topic:

AMERICA'S "V-DAY"

Introduction:

In last week's newsletter, we talked about how the U.K. was celebrating what the media declared as "V-Day" - the first day the country's vaccine rollout. This week, it was America's turn: Sandra Lindsay, a critical care nurse in Queens, NY on Monday became the first person in the U.S. to be vaccinated outside of clinical trials.

- **First draft of history:** Nearly a quarter of Americans (73%) agree that the administering of the first COVID-19 vaccines will go down in world history as a major event along with elections, wars, and peace treaties.
- **How does the vaccine rollout compare to other historic moments?** Americans think the first COVID-19 vaccines being administered is **more significant** than the legalization of same-sex marriage (36%), Barack Obama becoming the first Black president in the U.S. (35%), women receiving the right to vote (28%), The Berlin Wall being taken down (27%), and Neil Armstrong becoming the first man to set foot on the moon (26%).
- **More than 3 in 5 Americans (63%) think that people who sign up first to get the COVID-19 vaccine are mostly being smart**, while 37% say they are mostly being reckless.
- While nearly 3 in 5 Americans (58%) **believe the FDA approving a COVID-19 vaccine means that it is safe**, 42% do not believe that. Americans say their single most trusted source for information about the vaccine right now is the CDC (21%), followed by their healthcare provider (16%) and the FDA (13%).

Implication:

Despite the historic nature of the vaccine development, now comes arguably the hardest part: distributing the vaccine to those most in need and earning the trust of the American public that the vaccine is safe.



WAVE 38

WAVE 38 INTRODUCTION

The following research was conducted between **December 4-6, 2020** 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:

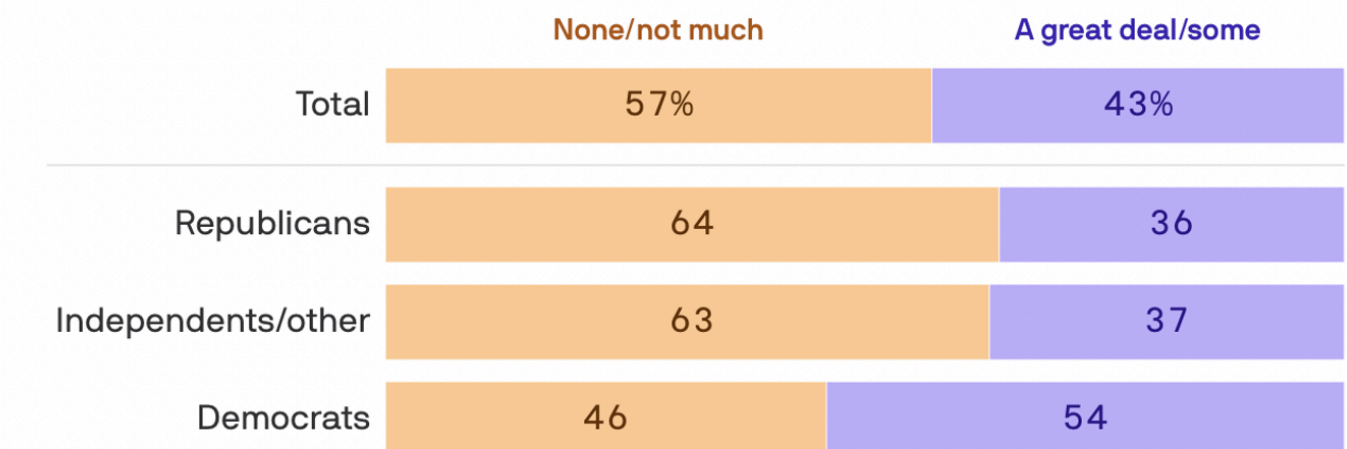
AXIOS EXCLUSIVE: MOST AMERICANS DON'T TRUST SOCIAL MEDIA ON COVID-19 VACCINE INFO

Introduction:

Our latest data, [exclusively covered in Axios](#) by Ina Fried found more than half of Americans say they have little or no trust in social media when it comes to information on the COVID-19 vaccine. Here's a recap in case you missed it:

How much do you trust the information you see on social media regarding COVID-19 vaccines?

Survey of 1,994 U.S. adults conducted Dec. 4-6, 2020



- Nearly three-fifths (57%) of Americans say they have either **no trust or not much trust in the COVID-19 vaccine info they encounter on social media**, compared to 43% who had either some trust or a great deal of trust in such information.
- **Why it matters:** For a vaccine to be effective in taming the pandemic, **people will have to receive accurate information** — and then be able to identify it as such. For many, that will mean receiving it elsewhere than on social media.
- Nearly seven in 10 (69%) agree "social media platforms such as Facebook and Twitter should aggressively monitor information about COVID-19 vaccines on their platform and remove any information they consider to be misleading.
- A similar number (68%) say "social media companies should establish **clear guidelines** as to what is considered credible information and sources on COVID-19 vaccines and only allow users to share from these sources.
- But that means nearly a third of Americans believe social media companies should **let people share whatever information they want** on COVID-19 vaccines, even if the platform considers it to be misleading.
- [The Financial Times details](#) how Facebook vows to remove false claims about COVID-19 vaccines from its platforms as well as its "plan to encourage users to take a vaccine, which could include publishing a banner at the top of users news feeds."

Implication:

The misinformation age has exacerbated—and been exacerbated by—the coronavirus pandemic. This will have detrimental effects on the efficacy of the COVID-19 vaccine, which is already like a fire hose to a wildfire, as reported by the [New York Times](#).

Section:

02

Topic:

HOME FOR CHRISTMAS

Introduction:

As Christmas approaches among a spike of COVID cases across the country, we took a closer look at how Americans are approaching this holiday season and the changes from 2019.

- **Americans are 2x less likely to be attending in-person gatherings;** last year, 41% attended an in-person gathering for Christmas vs. only 21% of those who say they will be doing that this year. Only 14% say they will be hosting an in-person gathering this Christmas vs. 23% last year.
- **Home for the holidays:** Three quarters (75%) say they are **not likely to travel for Christmas this year**. More than 2 in 5 Americans (43%) say any of their **Christmas plans have changed** in the past few weeks. Of them, 55% say how many people they would be seeing for Christmas has changed.
- **Americans are 2x more likely to be celebrating Christmas virtually this year:** Last year, only 11% celebrated Christmas virtually compared to 26% who say they will do so this year.
- **Unwavering Festivity:** 39% have already **decorated their Christmas tree** (last year, 41% decorated their Christmas tree in the first week of December) and 32% have put up decorations early (holding steady with the amount of Americans (36%) who did so last year).
- **Shopping early and local:** 34% have already started their Christmas shopping, and more than a third (36%) say they did or plan to purchase their real Christmas tree to **help support local small businesses this year**.

Implication:

Americans (hopefully) will be cooped up at home this Christmas, meaning it's more important than ever for brands to actively plan how to make the best of this Christmas. For example, brands which can provide last-minute or just-in-case solutions could have some big wins - for instance very last-minute shipping on DTC brands (especially if physical shops become inaccessible).

Section:

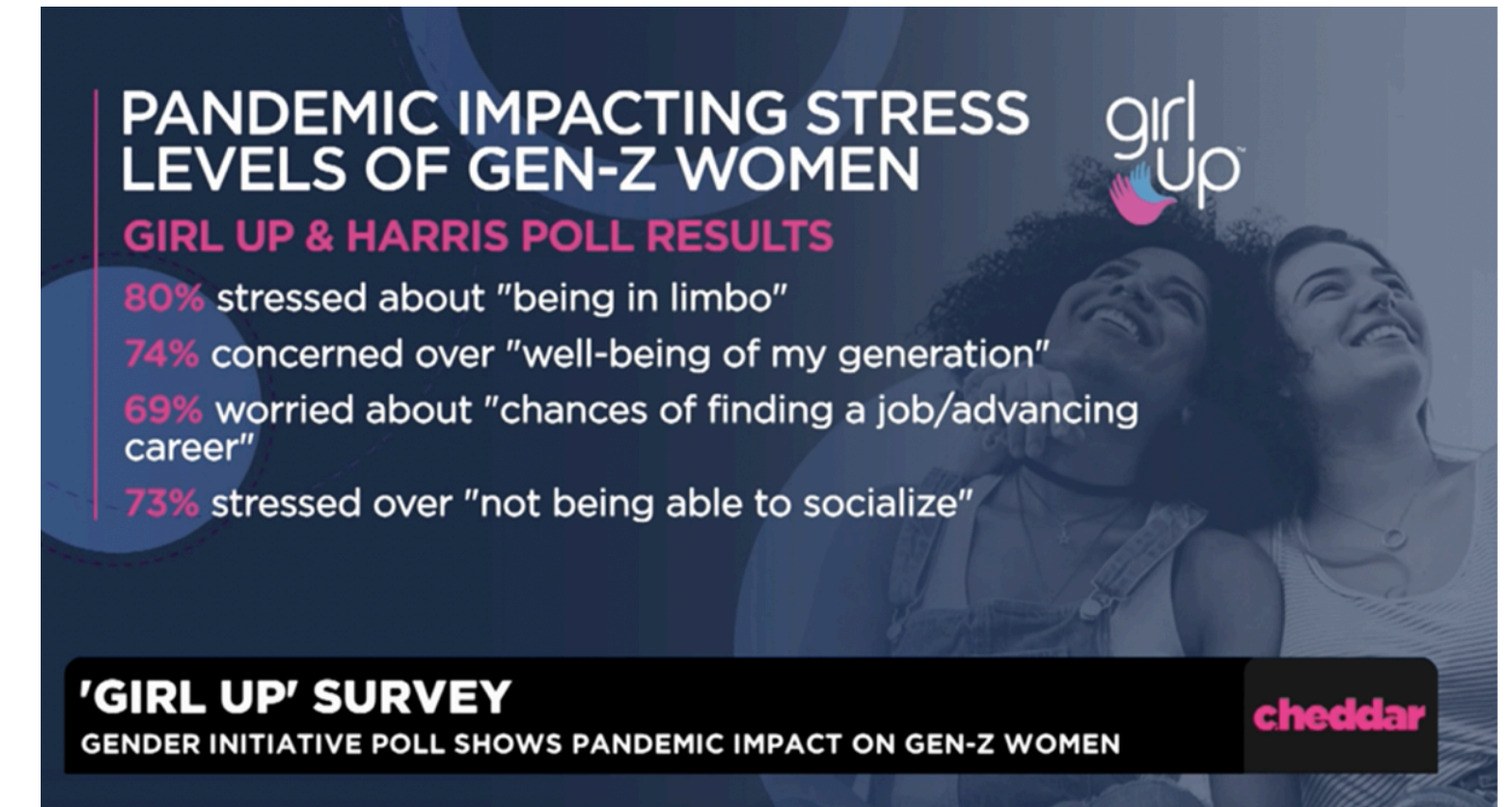
03

Topic:

COVID'S OUTSIZED IMPACT ON GEN Z WOMEN: UN FOUNDATION GIRL UP HARRIS SURVEY

Introduction:

Our latest joint research with [Girl Up](#), a United Nations Foundation organization, found that Gen Z women feel like the pandemic is having an outsized impact on their education and personal lives. Melissa Kilby, Executive Director of Girl Up discussed the findings on Cheddar Live ([watch here](#)):



Here are the highlights:

- **A majority (62%) of Gen Z Women say the pandemic has negatively impacted their education.** While similar numbers of Gen Z Men (61%) say the same, **Gen Z women are experiencing specific effects in higher rates:**
 - 59% of women vs. 48% of men say "COVID has **increased stress/ anxiety distracting me from studying**"
 - 40% of women vs 33% of men have experienced "a **gap in learning** between school closures and start of virtual learning"
 - 25% of women vs. 19% men say the pandemic has "caused me to **fall behind** with virtual learning because I have **limited internet access**"
- Zooming in further, these impacts are even higher for **Gen Z Women in college** compared to Gen Z women in high school: 65% are **struggling to find places to study** (vs. 41% high school) and 59% are **struggling to stay motivated** without **school social community** (vs. 47% high school).
- Despite the prevailing narrative Gen Z are reckless, detached super-spreaders of C-19, they actually **feel a social responsibility to fight COVID-19**, despite the outsized impact they're experiencing: 82% say, "I believe my generation has the power to help stop the spread, **it's up to us.**"

Implication:

Gen Z are the future of America, from the workforce to leadership, they will soon be at the helm. Empowering them to succeed now is critical for the future success of our country. And when it comes to fighting the pandemic, they're not waiting around for tools and resources, they're mobilizing their peers and leading grassroots change; 82% are **strictly following the mask mandate** and **actively encouraging others** to do so, too.

Section:

04

Topic:

“FOR REMOTE WORKERS, TIME IS RUNNING OUT TO FIX STATE-TAX MESSSES” WALL STREET JOURNAL X HARRIS POLL

Introduction:

This year the coronavirus pandemic turned millions of workers into telecommuters, and many haven't yet returned to the office. People who have worked from a state that isn't their usual one may need to file returns and pay taxes to more than one state for 2020. How this impacts Americans' tax bill featured [this week in the Wall Street Journal's](#) coverage of our study with the American Institute of CPAs.

- These requirements will come as a shock to many: **More than 7 in 10 (71%) of Americans don't know that telecommuting from another state can affect a worker's state-tax bill.**
- The survey found that, among those Americans who are still fortunately employed, 42% have worked remotely during the pandemic and 25% are currently working remotely.

- The survey also revealed that more than half (55%) of those who have worked remotely during the pandemic **were not aware that a failure to change their state tax withholding to reflect their remote work situation could result in tax consequences.**
- **Americans are looking out for their taxes:** Our survey found that 67% of those who have worked out-of-state notified their employer of the state they are working in, 51% have tracked the number of days worked in each state, and 41% have changed their state income tax withholding.

Implication:

The shift to remote work is among the most covered topics of the COVID year, but the ramifications are still becoming clear as the new landscape comes into view. And some companies are already placing their bets: just last week, Salesforce acquired workplace software company Slack for \$27.7 billion in what the [New York Times](#) calls the “biggest bet among a recent spate of acquisitions made by tech companies to capitalize on the shift to remote work.”

Section:

05

Topic:

VACCINE CHECK-IN

Introduction:

British media labeled Tuesday as “V-Day” or “Vaxit” as Margaret Keenan, a 90-year old grandmother, became the first person outside of clinical trials to receive the Pfizer-BioNTech COVID-19 vaccine, kicking off the country’s vaccination program. How are things looking across the pond?

- Overall, 40% of Americans say they are not likely to take the COVID-19 vaccine, while 60% of Americans say they likely will. **Which Americans say they are not likely to take it?** Women (44% vs. 35% of men); Gen Z/ Millennials (52% vs. 38% of Boomers); Households with under \$50k (54% vs. 29% of Households over \$100k); Republicans (46% vs. 32% of Democrats); and Black Americans (49% vs. 37% of White Americans) are some of the demographics least likely.
- **Nearly half of Americans (47%) say they are frustrated the COVID-19 vaccine has not been approved yet in the U.S.** [Though we are likely getting close](#): the FDA’s first analysis found the Pfizer-BioNTech vaccine offered strong protection across demographics after just the first of two doses.
- A large majority of Americans (80%) agree with **the CDC’s decision that healthcare workers and long-term facility residents should be the first** to receive a COVID-19 vaccine once approved.
- **Once enough Americans are vaccinated and we return to normal, we asked consumers what the first purchases or activities they’ll do:** 53% say visiting friends or family; 45% go out to dinner; 33% shop at the mall; 33% go on a big vacation; 29% go to a concert or theatre show; 25% go to an amusement park; and 25% go to a sporting event.

Implication:

An effective COVID-19 vaccine in record time is a miracle of science, but it will not be a silver bullet to stop the loss of life: [as the New York Times puts it](#): “At the current level of infection in the U.S. (about 200,000 confirmed new infections per day), a vaccine that is 95% effective - distributed at the expected pace - would still leave a terrible toll in the six months after it was introduced. Almost 10 million or so Americans would contract the virus, and more than 160,000 would die.”



WAVE 37

WAVE 37 INTRODUCTION

The following research was conducted between **November 30 - December 2, 2020** by The Harris Poll. Fielded among a nationally representative sample of **1,980** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

VACCINE SKEPTICISM

Introduction:

Though it seems impossible, [Dr. Fauci said this week people could be catching a Broadway show by the end of next summer](#) if enough of the public - 75 to 85% - are vaccinated against COVID-19. In our tracking, we are still short of that amount, with only (59%) of the public saying they are likely to receive the vaccine. What could instill more confidence in a skeptical American public?

- Fear of the unknown: of those who say they are not likely, **more than three-fifths (63%) say they are worried about unknown side effects**, (43%) say they do not trust the vaccine to prevent them from getting COVID, and (19%) will not receive any vaccinations. **And 78% of the general public is concerned about potential side effects** of the vaccine.
- Who will instill public confidence? **Nearly one-quarter (23%) of those not likely to get the vaccine say they would be more likely to get it if Dr. Fauci publicly gets it**, while only 13% are more likely if President Trump received it, 18% if President-Elect Biden receives it, and 20% if former President Obama does. **But presidents are not the only ones who can help win over a skeptical American public**: 11% say they would be more likely to if LeBron James gets it and 15% if Tom Hanks does.
- Former Presidents Bill Clinton, George W. Bush, and Barack Obama [announced this week they will publicly receive the vaccination on camera in order to boost public confidence in its safety](#).

Implication:

What can behavioral science teach us about nudging Americans to take the vaccine? [The Economist](#) put its best: “**First, we need to persuade people** who aren’t ideologically opposed to vaccines to get a jab. Second, we need to ensure that people willing to roll up their shirt-sleeve **actually follow through**.”

Section:

02

Topic:

WHAT THANKSGIVING MEANS FOR THE WINTER HOLIDAYS

Introduction:

Americans have been looking at the back-to-back-to-back winter holiday season with alarm and fear since the start of the COVID-19 pandemic and we are now in the middle of it. As we wait to see the full impact of Thanksgiving travel, what will the seemingly inevitable surge in cases mean for upcoming holidays?

- Americans are **evenly split on whether they will wait to see the impact of Thanksgiving travel on COVID-19 cases before making plans for the winter holidays** (51%) or not (49%).
- **The wait and see approach:** Two-thirds (66%) of Americans say they are less likely to have an in-person gathering for the upcoming winter holidays if COVID-19 cases rise as a result of Thanksgiving, with Seniors (73%) and Boomers (69%) being more cautious than Gen Xers (57%).
- **Thanksgiving regrets are personal:** more than three-fifths (62%) of those who gathered with others in-person for Thanksgiving say they **will have regrets if someone they know caught COVID-19 at their gathering**, while only (43%) say they would have regrets if there is a general spike in cases as a result of Thanksgiving.
- [The Washington Post explains](#) “why health officials are terrified of a pandemic Christmas.”

Implication:

Millions of Americans hedged their bet on celebrating Thanksgiving in-person and the consequences may not be fully apparent until Christmas, Hanukkah, and New Year's are here, causing millions to suddenly change travel plans or accelerate the pandemic even further.

Section:

03

Topic:

BLACK FRIDAY IS NOW ONLINE

Introduction:

What did Black Friday in 2020 look like? We checked in with Americans to see how they kicked off the holiday shopping season during the pandemic:

- **Cyber Black Friday:** One-third (33%) of Americans shopped on Black Friday last week and another (12%) shopped for holiday gifts at some other point that week, **while nearly all (89%) did so at least partly online** (44% only online, 45% both in-store and online).
- **Pandemic Spending:** Three-quarters (76%) spent more than \$100 on Black Friday shopping this year, and one-quarter (26%) spent more than \$500.
- **What were Americans shopping for?** One-third (33%) bought home goods like bedding and furniture; (31%) video games, (31%) new personal tech, (29%) kitchen and dining products, (27%) smart home devices), and (26%) computers or tablets.
- **Black Friday looked different during a pandemic:** with sales spread throughout the week and a heavier emphasis on Cyber Monday, [USA Today says Black Friday itself was the “quietest in 20 years”](#) while online sales soared.

Implication:

The fortunate Americans who are financially able to spend on the holiday season will continue to do so, but their typical holiday shopping and travel patterns will continue to adjust for the times.

Section:

04

Topic:

CHARITABLE GIVING IN THE TIME OF COVID

Introduction:

Coming off of the heels of the most unprecedented GivingTuesday yet, where giving [increased 25% from last year in the U.S. alone](#), we took a deeper look at how the pandemic is reshaping how Americans approach charitable giving and what they expect of business.

- **The pandemic has made some Americans more interested in supporting charitable organizations:** this was especially true for higher income households \$100k+ (47%), Gen Z/Millennials 18-34 (40%) and adults 35-49 (45%) compared to (35%) of the general public.
- **Small gains with long-term impact:** While only nearly a fifth (18%) donated to a new charitable organization during COVID, nearly three-quarters (73%) of those people say they will continue to support the cause in the future.
- **Giving back is good for business:** (86%) say they would have a more positive view of companies who give back to charities and (58%) say they are more likely to buy from a company who gives back to charity. See what [Everlane](#) has done by donating profits from special sales and collections to charitable causes, and [Minted](#) by creating Notes of Gratitude collection that benefits World Central Kitchen, a nonprofit organization that supports local restaurants and communities.
- **Gen Z women are mobilizing support in their communities:** In our [joint-survey with the United Nations Foundation Girl Up](#), we found that Gen Z women are taking action to address COVID-19, 59% are engaging family/friends **how to stay safe**, 28% **helped an older friend/neighbor in need**, 27% took part in **social media activism** to drive awareness of COVID and 14% **volunteered**. Overall, 70% of Gen Z Women have done some form of **public activism** recently vs 62% of Gen Z Men.

Implication:

GivingTuesday showed us what we are capable of and how much more we can do and the rising demand for business to follow suit... In a single day, GivingTuesday donors in the United States gave \$2.47 billion, an amount that is more than all but one U.S. philanthropic foundation gave in a full year during 2019.

Section:

05

Topic:

HARRIS POLL CEO WILL JOHNSON IN CRAIN'S CHICAGO BUSINESS: “EMERGING OPTIMISM FOR 2021”

Introduction:

Harris Poll CEO, Will Johnson [wrote an op-ed on Tuesday for Crain's Chicago Business](#) about the exclusive Chicago Executive Pulse survey, conducted in partnership with Crain's and The Harris Poll, showing Chicago-area execs are starting to see light at the end of the tunnel.

- The survey, conducted among over 200 area business leaders (owners, C-suite executives, vice presidents and directors) found local **executive expectations remain positive** with (44%) reporting **Chicago's economy will be in good** or very good condition in six months, and (48%) saying the same of the broader U.S. economy.

- The majority of Chicago executives expect that the Biden administration will positively affect **job growth** (57% as opposed to only 22% who think it will have a negative effect) and **reopening the economy** (55% as opposed to 31% who disagree).
- Strong pluralities of Chicago-area business leaders are also optimistic about the new administration's effect on **public market performance** (48% positive versus 27% negative), **trade relations** (48-24), **intellectual property protection** (49-20) and **health care** (46-23).
- A greater number of business leaders reported **rising** (47%) or **stable** (32%) **revenues** over the last month. Nevertheless, roughly the same number of leaders now say that **business conditions have deteriorated** over the last month as in August (55%, down from 57%).

Implication:

The unmistakable momentum of positive expectations is checked by a still-rising pandemic, but as conditions improve, with the help of three promising vaccine candidates, it will build a tension and then a torrent. The next year could see a fast-developing, explosive change—that marks a long-sought return to normalcy.



WAVE 36

WAVE 36 INTRODUCTION

The following research was conducted between **November 19-21, 2020** by The Harris Poll. Fielded among a nationally representative sample of **2,042** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

THANKSGIVING 2020

Introduction:

Like many other seasonal events in 2020, Thanksgiving will be a little unconventional. Nearly a quarter of Americans (23%) told us they will be having a non-traditional Thanksgiving dinner (up from 17% last year) and only just over half (56%) say they will be eating turkey this year. Here's what else is changing and what's staying the same:

- **Last-minute change of plans:** Nearly 4 in 10 (39%) say they have experienced last-minute changes to the number of people at their gathering, where their gathering will be held (21%), their travel plans (20%), and when their gathering will be held (19%).
- **Virtual turkey?** It's 2020, so maybe: Nearly 3 in 5 Americans (57%) say they would be willing to have a virtual Thanksgiving with those who live outside of their own home this Thanksgiving.
- **Americans are twice as likely to be cooking alone this Thanksgiving:** Only (10%) said they cooked dinner at home alone last year, while twice that amount say they will be taking on Thanksgiving dinner solo (20%) this year. In addition, the amount of Americans who went to a family/friend's house for Thanksgiving dinner last year decreased 11 percentages from (29%) to (18%) this year. This might explain why there are [reports of a small-turkey shortage](#)...
- **Smaller budgets:** We have seen the dire economic impacts of COVID on American households (28% have lost income partially as of this weekend), which might explain why around a third (34%) say they will spend less on Thanksgiving dinner this year compared to years past.

Implication:

While Thanksgiving might look similar at some households this year, (34%) say they will be cooking dinner at home with friends and family, it certainly doesn't feel the same amid a global pandemic. But all the while, (67%) of Americans say are thankful for the sacrifices that the American people have made for coronavirus.

Section:

02

Topic:

HARRIS POLL/ BLOOMBERG BUSINESSWEEK: MONEY COULD MOTIVATE SOME PEOPLE TO GET A COVID-19 VACCINE

Introduction:

Economists have recently suggested a way to combine herd immunity and economic stimulus: paying people to get a COVID-19 vaccine. This week, [published in Bloomberg Businessweek](#), we released the first survey to find out whether payments would work and the results are ... murky.

- **(Don't) Show Me the Money:** Most Americans, though, say that money isn't a motivator: 4 in 10 (39%) say they would get a COVID-19 vaccine even if the government didn't pay anything, while (23%) say they would not get a vaccine even if they were offered a payment.
- How much? **One-quarter (24%) mentioned sums of \$100 or less**, while less than 1 in 5 (16%) mentioned higher amounts.

- **More than half of Americans (53%) say everyone should have to get a COVID-19 vaccine** while nearly half (47%) say, certain people, such as Jehovah's Witnesses, Christian Scientists, or those who oppose vaccinations, should be exempt from getting a COVID-19 vaccine.
- **Americans are experiencing a mix of emotions in response to the vaccine news:** about one-third say they feel relieved (35%) or excited (28%) while (29%) say they are anxious and (23%) scared.

Implication:

It's hard to draw a straight line from the poll to policy. How people answer a hypothetical question is only loosely connected to how they would behave in a real-life situation—cash in the palm for a needle in the arm. Money might be more effective than the poll indicated, or less.

Section:

03

Topic:

HARRIS POLL/ FORBES: YOU WILL LIKELY NEED TO GET A COVID SHOT TO FLY IN 2021

Introduction:

This week, Australia's largest airline said proof of getting a COVID-19 vaccine will be necessary for boarding international flights in the future. [In an article featured yesterday in Forbes](#), we checked in with how Americans feel about this requirement and

- **The majority of Americans strongly support a “no proof of immunity, no ticket” policy after Covid-19 vaccinations are widely available to the public:** two-thirds (66%) say that, once vaccinations are rolled out, airline passengers should be required to show proof of vaccination in order to fly.
- More than **three-fifths (62%) of respondents say it should be a federal mandate**, while the same percentage (62%) say they would support individual airlines making the requirement.
- Last week, [Delta Air Lines announced](#) they would keep the middle seat open until at least March 2021. And Americans support the move: until there is widespread distribution of a vaccine, **an overwhelming (82%) of Americans believe airlines should keep the middle seat open.**

- Still, with multiple vaccines on the way, it's become increasingly clear that many American would-be travelers are simply playing the waiting game: just over two-thirds of respondents (68%) **say a COVID-19 vaccine will determine when they travel again.**

Implication:

“We're all hoping that a Covid-19 vaccine will be a game-changer for society, but our data certainly shows it may be just that for the air travel industry,” says John Gerzema, CEO of The Harris Poll. “What the traveling public seeks is certainty and nearly seven in 10 say a vaccine will have a major impact on when they travel again.”

Section:

04

Topic:

PARENTS BRACE FOR MORE SCHOOL CLOSURES

Introduction:

Last week, [New York City closed public schools](#) as school districts across the country weigh their own decision to follow suit or remain open. We checked in with parents on how they feel about schools as we move into the winter months:

- Two-thirds (66%) of parents have seen, read or heard about the recent announcement of NYC schools closing again due to a spike in COVID-19 cases.
- A large majority of parents (80%) **believe it is likely that the school in their area will close again** as well given the announcement of NYC schools closing again.
- **More than three-quarters of parents (78%) are concerned for a second wave of COVID-19** in their area and three-fifths (60%) of parents are concerned about being exposed or exposing others to COVID-19 when their kids go to school.
- Last week, [The Wall Street Journal wrote that teachers should be among the first to receive a COVID-19 vaccine](#) in order to safely reopen schools more quickly. And Americans agree: **half (49%, up from 44% earlier in the year) says teachers should be prioritized in receiving a vaccine as soon as it is available.**

Implication:

We may never know the full social cost of disrupting the education of a generation of students, from low-income students being at a disadvantage to remote learning to college seniors missing out on internships.

Section:

05

Topic:

THE SECOND PEAK WILL BE MORE PERSONAL FOR MANY

Introduction:

It is starting to feel like March all over again as COVID-19 cases and hospitalizations surge across the country and local governments implement more restrictive measures. While the spring wave was somewhat limited to certain areas, nearly every city and town across the country is experiencing the impact of this wave. Does this time feel different for Americans?

- COVID is now personal for most: three in 5 Americans (60%) **say they know someone in their life who had/has COVID-19**. Nearly a quarter (23%) **think they may have had COVID-19** at some point but did not get an official test.
- **A sobering stat:** Nearly 4 in 10 (37%) say they know someone who has died from the virus.
- Of those who know someone who had/has COVID-19, around 3 in 5 (61%) say they are **more concerned about COVID-19 given that someone in their life has/had it**. Yet nearly a quarter (24%) say they are no more or less concerned.
- Of those who know someone who had/has COVID-19, three-fifths (60%) say they are more strictly following COVID-19 safety precautions.
- Read More: [The New York Times](#) takes a deep dive into how COVID has evolved into a crisis that virtually everyone has experienced up close and how that will affect behavior but in many different ways.

Implication:

What was once thought of as someone else's disease is now creeping into neighborhoods and social networks left and right; one bit of hope is the fact that the closer it gets, the more real it feels, increasing the likelihood of people taking it seriously and doing their part to keep themselves and others safe.



WAVE 35

WAVE 35 INTRODUCTION

The following research was conducted between **November 11-13, 2020** by The Harris Poll. Fielded among a nationally representative sample of **1,963** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

HARRIS POLL CHAIRMAN, MARK PENN IN WSJ: “AMERICA’S SHOCKINGLY MODERATE ELECTORATE”

Introduction:

Mark Penn, Chairman of The Harris Poll, [wrote on Monday for the Wall Street Journal](#) that the 2020 election results were close and split because voters rejected radical changes:

- “We are one country divided by two parties. **The nation is largely moderate, practical and driven by common sense over ideology. Most voters prefer compromise on health care, immigration, stimulus and other thorny issues that the extremes of the parties have pushed to the limits.** Only 24% of voters identify as liberal, while 38% say they’re conservative, according to CNN exit polls. Another 38% are moderate.”
- “Mr. Biden won almost all the liberals and Mr. Trump the conservatives. But Mr. Biden expanded the Democratic lead among moderates to 30 points from 12 in 2016—the single most significant change. **Moderate men swung the race to Mr. Biden.**”

- “Any race decided by such small margins could have been won by either side. Mr. Trump failed to improve his character or tone down his rhetoric, and he ran without developing a clear second-term agenda. [...] The Biden campaign focused on character, but if character outweighed issues, Mr. Trump would have lost by 20 points. Democrats did win on the virus, which was voters’ No. 2 issue, and that’s likely what put Mr. Biden over the top. **Voters made the rather sensible determination that while Mr. Trump might have done a good job with the economy, he did a bad one with the virus.**”

Section:

02

Topic:

AMERICANS EMBRACE REMOTE WORK; MORNING BREW X HARRIS POLL

Introduction:

This week, in partnership with Morning Brew, a new Harris Poll found the increase in remote working has helped Americans live a more healthy lifestyle. Here's what we found:

- Two-thirds (67%) of remote workers say their **lifestyle has gotten healthier** since working from home; 41% say they've been **eating healthier snacks** throughout the day and 38% say they've been **taking time to cook their meals**.
- **What else is healthier? Work relationships:** Around 2 in 5 remote workers (41%) say **communication with their manager is more effective** since working remotely. What's more is when asked what they **don't miss about the office**, nearly a third (29%) say the **office gossip** and 26% say **distractions** such as over-hearing co-workers on the phone.
- Remote workers are also enjoying a more **flexible routine**. In fact, if they could split their time between working in an office setting and a remote work setting, Americans would choose to do 2 days in an office setting and 3 days in a remote work setting, on average.

- **What would Americans miss if/when they go back to the office?** The top three things employed Americans said they'd miss about working remotely, if they had to return to an office, were: saving money by spending less on gas and lunches each week (41%), extra time in the mornings (40%) and being at home with their family (39%).
- While remote workers are finding their groove in the #WFH lifestyle (that seems to have no end in sight) **there are some aspects employees like about the office setting that they can't get at home, such as** in-office socializing (31%), their desk setup (28%) and in-person meetings (24%).

Implication:

Employers are not off the hook: they need to think strategically about how to create a fulfilling work life without the convenience of the office and also be ready to accommodate new demands if/when they return.

Section:

03

Topic:

GET READY TO VERIFY YOUR VACCINE

Introduction:

Last week, we got a glimpse of what events with big crowds - one of the final indicators we've returned to some kind of 'normal' - may look like in 2021: [Billboard profiles](#) Ticketmaster's new system in which fans will need to validate their vaccination status or a recent negative test using its app before accessing their ticket.

- **However, vaccine validation may not be enough to get Americans back into seats.** Only half (50%) of Americans say they'd feel safe attending a concert or sporting event with such a system, while 64% say they'd feel safe enough to go back to the office, and 57% to attend a work conference.
- **"Play Freebird"**: more than one-quarter (27%) plan to attend a concert or sporting event (up from 18% in April) as soon as we return to normal, with Gen X (33%, vs. 23% of Boomers) the most likely to head to the arena.
- Axios says [Ticketmaster's plan to require a digital health pass for concertgoers might be a model for airlines](#).
- **Test Like a Champion Today**: if you watched Notre Dame students rush the field after toppling #1 Clemson the other week and thought crowded stadiums were already back, you likely weren't alone. [Now, the university is ordering all students to be tested for the virus](#) or they will not be able to register for the spring semester.

Implication:

The efficacy of a vaccine validation system for public events will hinge on vaccine distribution, a looming puzzle we have yet to solve. Meaning businesses will have to continue planning for uncertainty in the immediate and near term where being agile and innovative is critical in order to reach customers across ever-changing touch-points.

Section:

04

Topic:

COLLEGE ATHLETE ENDORSEMENT PAY GETS MILD PUBLIC SUPPORT; SPORTICO X HARRIS POLL

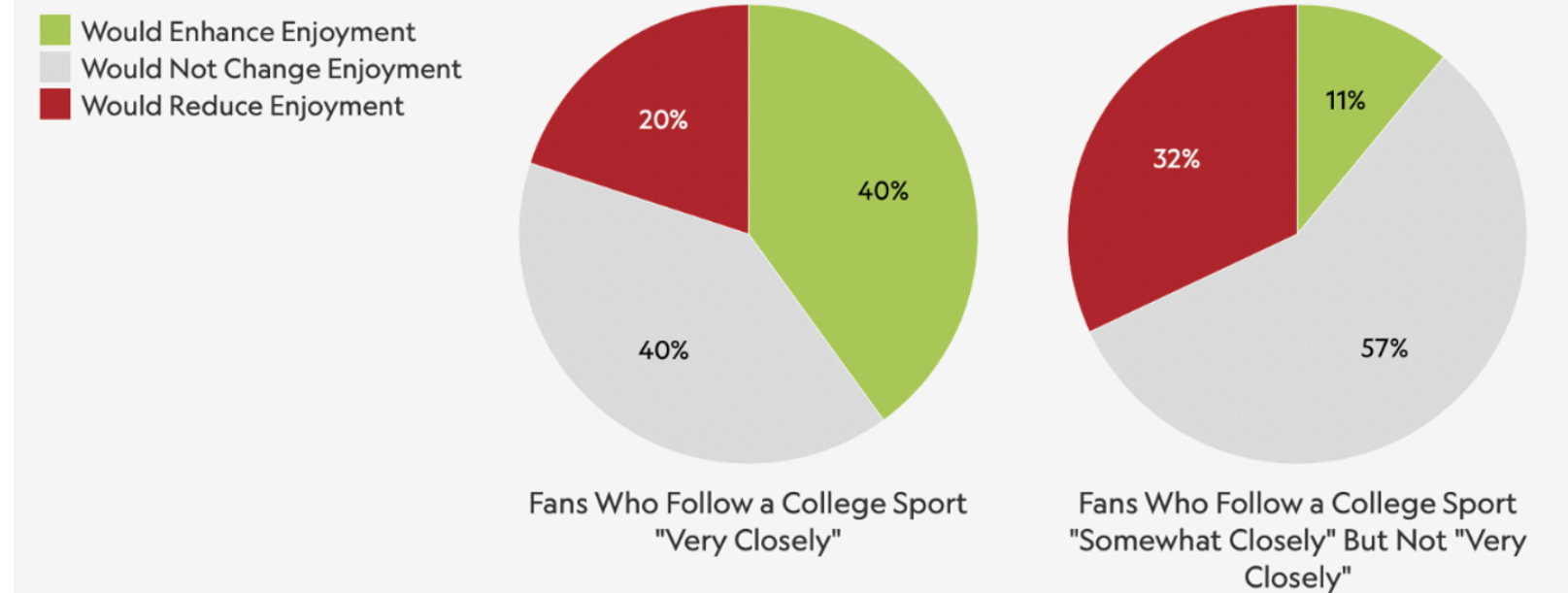
Introduction:

Student athlete endorsements in some form will be coming to college sports soon and the public approves. [Last week, in partnership with Sportico, a new Harris Poll](#) found the public supports college athletes being able to profit from their Name, Image, and Likeness (NIL), with support even higher among sports fans.

- **Support for college athletes being able to earn money from their NIL is significant from college sports fans as a whole (70%),** but highest among men's basketball fans (75%). The general public is less in favor (62%).

- **Survey Says:** The NCAA has argued in court that athletes being able to profit from endorsements will reduce fans' enjoyment of college sports, in turn harming the schools and the teams. **According to our survey results, most college sports fans say that it would either enhance (28%) or not change (47%) how they enjoy college sports.** More than one-third (37%) of women's college sports fans, in particular, say that it would enhance their enjoyment.
- **Most people support some restrictions on player endorsements:** three-quarters (75%) of college sports fans (and 70% of the general public) say that players should be prohibited from endorsing certain types of companies, such as sports gambling businesses, despite the fact that universities themselves have recently begun to partner with such organizations.

Few Fans Say Athlete Endorsements Would Reduce Their Enjoyment of College Sports



Full question: "How would NCAA college athletes being allowed to profit off their name, image, and likeness change how you enjoy college sports?"

Chart: Lev Akabas • Source: Harris Poll / Sportico

Implication:

Will college sports be a new opportunity for marketers? [Sports Illustrated tells how](#) "UNC has created a new branding initiative, Blueprint 919, to provide football student-athletes resources to understand and navigate potential opportunities" and is partnering with a brand marketing expert to help athletes "to develop and grow their personal brands."

Section:

05

Topic:

COVID IS NOT THE ONLY THING KEEPING AMERICANS OUT OF MOVIE THEATERS; YAHOO FINANCE X HARRIS POLL

Introduction:

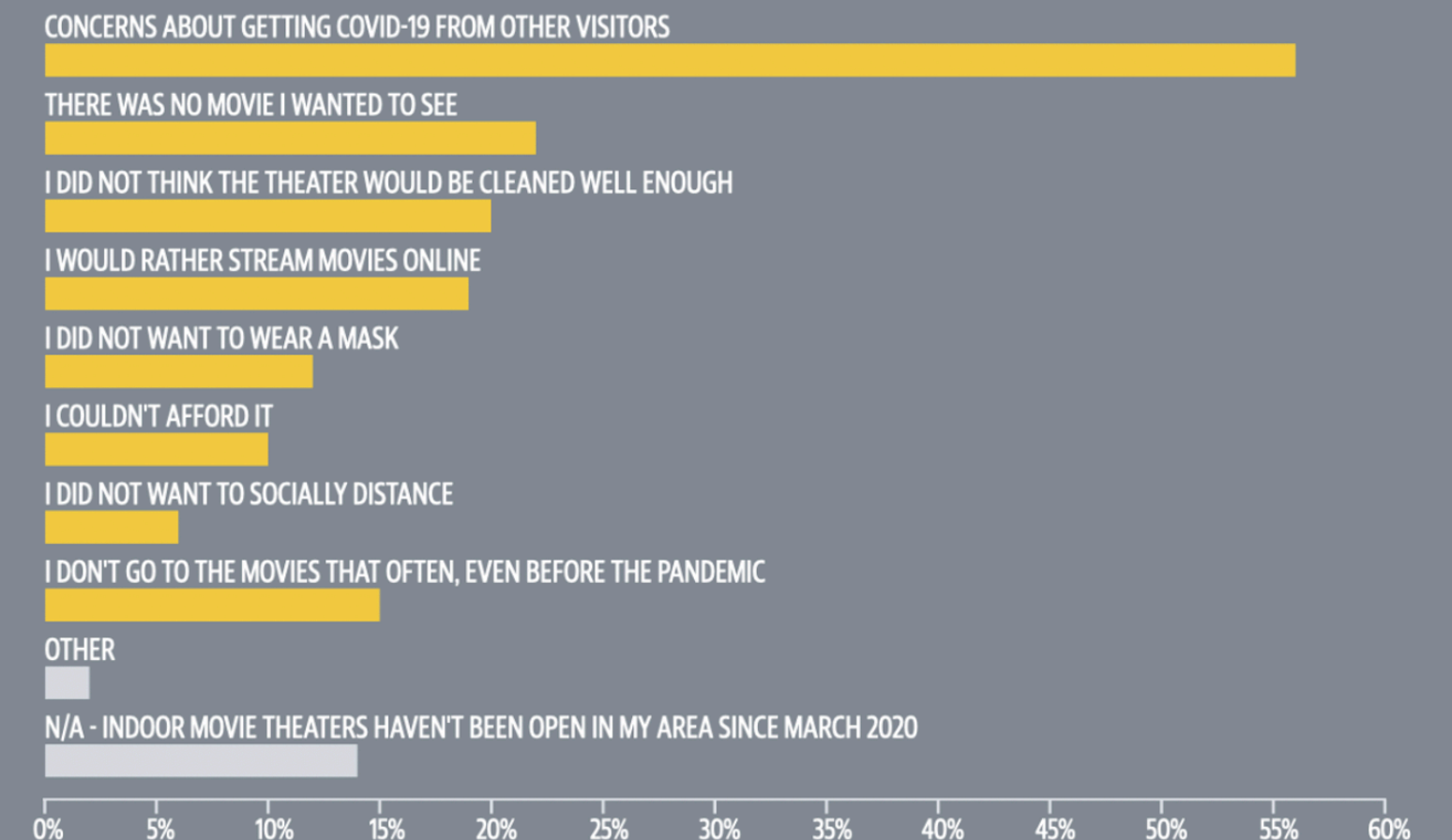
Pfizer's positive news about its experimental COVID-19 vaccine on Monday morning sent in-person entertainment stocks surging, including movie theater names like AMC and Cinemark. But for the movie theater industry, the end of the pandemic won't necessarily prompt an immediate return to boom times. [A recent Harris Poll for Yahoo Finance](#) finds that COVID-19 concerns are not the only factor keeping Americans from returning to movie theaters.

- **More than half (56%) say they have not been to the movies since March because of concern of getting COVID-19 from other visitors**, while 20% say they worry the theater wouldn't be cleaned well, and 12% say they don't want to wear a mask.

- **And the pandemic has made Americans more reluctant to go to a theater next year:** 33% of those surveyed said they expect to go to movie theaters less often in 2021 than they did in 2019.
- Among those who haven't gone to a theater since before the pandemic, half (53%) said a COVID-19 vaccine would make them feel more comfortable.
- **The Blockbuster-less Year:** Just under one-quarter (22%) say there has not been a movie they wanted to go see, while 19% say they'd rather stream a movie. Which shouldn't be of much surprise, given highly anticipated blockbusters like [Dune and Black Widow have been delayed until late 2021](#) in hopes people will be able to return en masse by then.
- **The Streaming Wars:** Among those reluctant to go to a movie theater in 2021, 31% say it is cheaper to watch movies at home and 25% say it is because fewer movies are being shown in theaters now.

WHAT'S KEEPING AMERICANS OUT OF MOVIE THEATERS?

If indoor movie theaters have re-opened in your area, why haven't you visited one since March 2020?



SOURCE: HARRIS POLL OF 672 US ADULTS CONDUCTED NOV 6-9, 2020

yahoo/finance
The Harris Poll

Section:

05

Implication:

Movie studios are driving the trend away from movie theaters and to the home screen by postponing or skipping theatrical release, a practice that accelerated during the pandemic when theaters were closed, but is now expected to continue even beyond the pandemic. And some movie studios are quickly adapting: [on Monday, Universal Pictures](#) “struck another deal [...] to shorten the theatrical window from three months to as little as 17 days in an effort to adapt to the new business realities of moviegoing.”



WAVE 34

WAVE 34 INTRODUCTION

The following research was conducted between **November 5-7, 2020** by The Harris Poll. Fielded among a nationally representative sample of **1,983** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

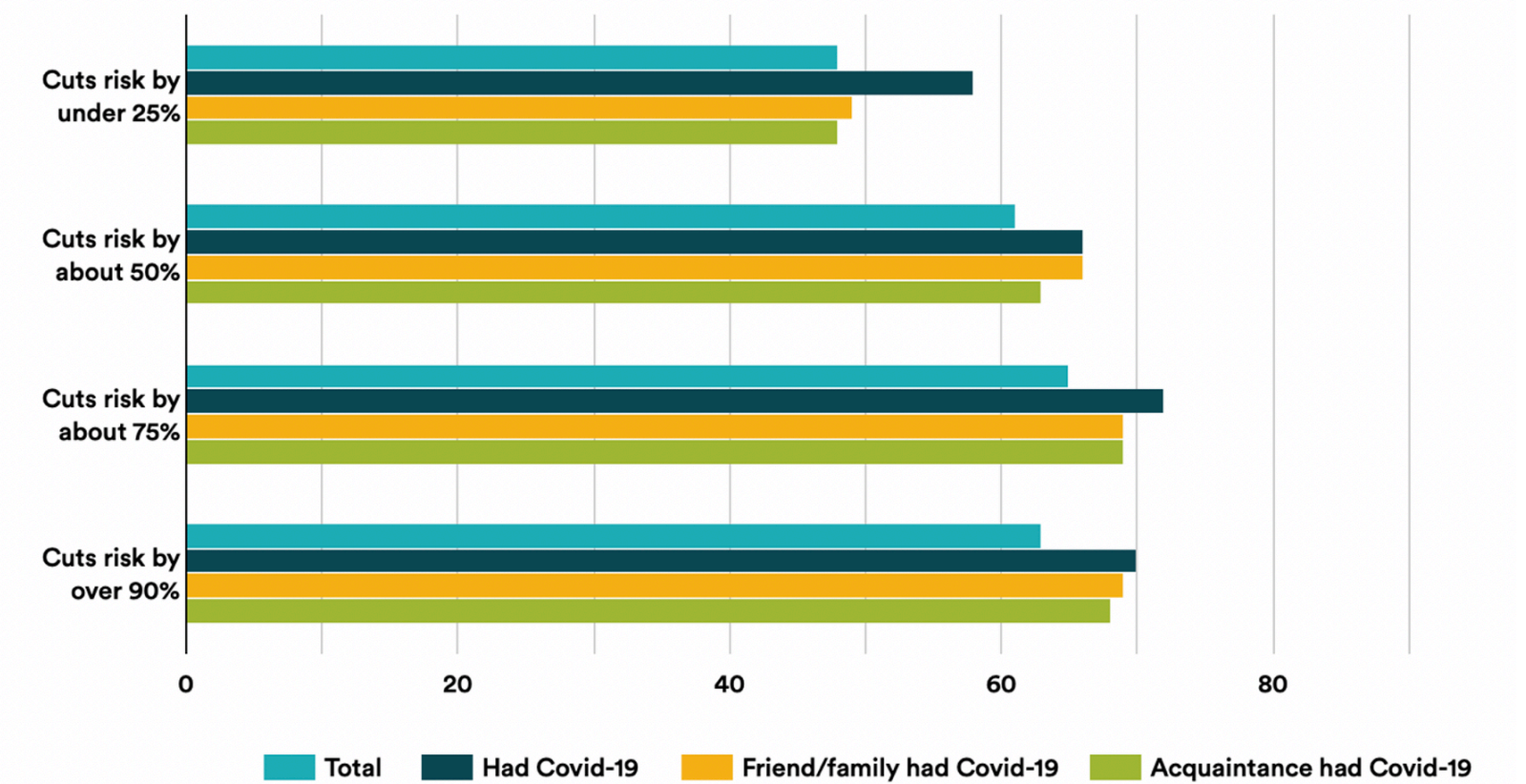
Topic:

STAT-HARRIS POLL: MOST AMERICANS WON'T GET A COVID-19 VACCINE UNLESS IT CUTS RISK BY HALF

Introduction:

[A new survey from STAT and The Harris Poll](#) found that six in ten Americans are somewhat or very likely to get a COVID-19 vaccine if doing so would lower the risk of becoming infected by about half. Here's what else the survey found:

Share of Americans who are somewhat or very likely to get a Covid-19 vaccine, based on efficacy



- **Younger generations are more risk averse:** only 56% of those between 18 and 34 years old are likely to get vaccinated if a shot would decrease the odds of becoming infected by half. This rose to 64% though, when a vaccine would reduce the risk of contracting the coronavirus by 75%.
- **Familiarity with COVID-19 increases likelihood:** More Americans say they are likely to get a vaccine, practice social distancing, and wear a mask if they or someone they know has contracted COVID-19.
- “As people are hearing stories about friends and family or from an acquaintance, it’s shaping their views,” said Rob Jekielek, managing director of The Harris Poll. “So being able to show people the implications on someone’s health is really important.”
- The survey results came in just before [Pfizer announced](#) that its vaccine candidate was effective in over 90% of uninfected clinical trial patients. Pfizer’s chief executive has said that it could have 30 to 40 million doses of the vaccine before the end of the year, enough for 15 to 20 million people to get an initial shot and a booster three weeks later.

Implication:

News of the vaccine is promising but we still have a long road ahead. While the world waits for a vaccine that meets their standards, people continue to fight the daily battle of desire over safety; the only defense we have are masks and social distancing, but still today only 54% said they were less likely to attend a large group event after contracting COVID-19.

Section:

02

Topic:

READY OR NOT, IT'S ALMOST THANKSGIVING 2020

Introduction:

In a year where time seems to be standing still, we are just a few weeks away from Thanksgiving. While our latest data, covered exclusively in [Adweek](#), shows 75% of Americans have plans for Thanksgiving this year, like almost every major event in 2020, this holiday is going to be different.

- **Celebrating Thanksgiving Bubble Style:** With COVID-19 cases spiking across the nation, many Americans are opting to celebrate in smaller groups over traditional large gatherings; nearly 4 in 10 (37%) will be celebrating at home with their immediate family while less than a fifth will be celebrating with extended family (16%).
- **Read more:** The CDC just released Thanksgiving guidelines focusing on small household gatherings.
- Nearly a third (31%) of Americans say **political conversations in their family are more heated** this year compared to last year and 32% are **anxious** thinking about their family's political debates over Thanksgiving, especially Gen Z/Millennials (44%).
- **Keeping the peace at the Thanksgiving table:** Around half (51%) of Americans say they **avoid discussing politics** with their extended family at all costs during the holidays.

- **Stressed? Butterball Turkey Hotline has your back:** [Butterball's Turkey Hotline](#) has been preventing Thanksgiving disasters for 35 years and has evolved with the times; this year they are ready to address whatever issues callers might have—whether those are related to thawing time, oven temperature or higher stress levels because of everything happening in the world right now.

Implication:

While Americans are anxious heading into Thanksgiving this year, the thirst for connection is at an all-time high: 71% miss gathering with friends and family, and more feel thankful (65%) than those who feel angry (48%). Businesses and marketers should take note from Butterball's Turkey Hotline, because 76% of consumers say they will remember the brands who did the right thing by addressing issues related to the COVID-19 pandemic.

Section:

03

Topic:

MENTAL HEALTH CHECK IN

Introduction:

During the pandemic, Americans are experiencing a mix of emotions: [in our annual Stress In America study on behalf of the American Psychological Association](#), nearly 8 in 10 adults (78%) say the coronavirus pandemic is a significant source of stress in their lives. What's more is that 62% think the worst of COVID-19 is still ahead of us and 48% are upset that they don't know when this will end. We checked in with Americans on how they're coping with the stress and anxiety that comes with the pandemic:

- **Tuning out:** While 46% have cabin fever and 34% feel overwhelmed, 59% are coping by watching TV, 43% are listening to music, 33% are playing video games, and another 33% are streaming TV shows and movies.
- **Fostering moments of connection:** Meanwhile, 43% feel lonely and just over one-third (36%) are spending time with their family to cope with pandemic stress.
- **Reflection and Gratitude:** Meanwhile Americans are ushering a **counter response to stress and dislocation** through reappraisal of their values and lives to focus on the things that really matter; more people feel appreciative (67%) than those who feel angry (48%).
- **Adopting new habits centered around betterment:** we see people have a renewed appreciation for the outdoors (69%) and are getting out walking more to enjoy it (40%). Looking ahead, 42% plan to **stay more physically active**; 76% of people who have donated to **charity** due to the pandemic will continue to support in the future; and nearly one-third (31%) **changed their industry or career path**.
- **How businesses are stepping up:** Tech company, [UiPath](#) expanded its **mental health benefits** to employees, committing the equivalent of 1% of salaries to health and wellness programs, [as reported by CNBC](#). [Hims](#), launched [Anonymous Online Support Groups](#) for everyone, offering free sessions focusing on everything from relationship issues, anxiety, and insomnia.

Implication:

Serve the betterment consumers seek. If a [sixth grader reinvented a classic video game to combat the stress of COVID-19](#), so can businesses.

Section:

04

Topic:

THE BIPARTISANSHIP OF TECH ANTITRUST

Introduction:

Once the Biden Administration takes office in January, Americans can expect a drastic pivot on any number of big issues. However, there is one contentious issue that we may see continuation in some form: antitrust against big tech.

- **Why is this one issue in which the two administrations are not on opposite sides?** [In our poll from late October featured in Axios](#), we found Americans **overwhelmingly see the big tech companies as having monopoly power that limits competition and it cuts across partisan lines**: 77% of Republicans and 76% of Democrats agree the “Big 4” tech companies (Amazon, Apple, Facebook, Google) have a monopoly in their respective sectors that limits competition and innovation.
- [The New York Times writes](#) how the future Biden Administration “is expected to keep scrutiny of tech front and center. [...] **Bipartisan support to restrain its power has grown sharply during the Trump administration and shows no signs of going away as Democrats regain control of the White House.** Mr. Biden is expected to take on the Silicon Valley giants on misinformation, privacy and antitrust, in a sharp departure from the policies pursued while he was vice president under Mr. Obama.”
- **Search engine cognitive dissonance**: while 8 in 10 (80%) Americans say adequate alternatives to Google’s search engine exist, the same number (80%) say Google is their first choice when searching for information online (followed by Bing at 6%) and **half (50%) also say Google has too much control over the online search engine market** and their options as a consumer are limited.

- More than half (55%) of Americans agree that Google has too much power and should be broken up; while 45% say the same of Facebook and 37% of Amazon.

Implication:

Americans of both parties have a love/hate relationship with big tech that does not appear to be ending anytime soon. We [wrote last year about the Tyranny of Convenience](#) many Americans face: we lament both their control over the market and how they are so interconnected with our lives while not being able to give up their convenience and ease of use.

Section:

05

Topic:

ELECTION REFLECTIONS

Introduction:

While President-Elect Joe Biden announced his COVID-19 task force this week as President Trump prepared to challenge the results in five states, we asked Americans the one question dominating political circles this weekend: will President Trump run in 2024?

- As featured in [Axios's scoop that President Trump is already privately discussing a 2024 run](#), our data shows 2 in 5 Americans (40%) think that if Joe Biden is the winner of the 2020 presidential election, Donald Trump will run for president of the United States in 2024. One-third (33%) said he would not, and 27% were unsure.
- **President Emeritus:** Of those who think that Donald Trump will run for president in 2024, 46% say they would vote for Trump (including 81% of Republicans), while (37%) say they would vote for the Democratic opponent. Nearly one-fifth (17%) would either vote for someone else or are unsure.

Implication:

Few things will dominate the (already underway) 2024 presidential conversation as much as President Trump weighing a decision to become only the second president ever to serve non-consecutive terms in the White House.



WAVE 33

WAVE 33 INTRODUCTION

The following research was conducted between **October 29-31, 2020** by The Harris Poll. Fielded among a nationally representative sample of **1,954** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

NATIONAL FEAR RISES AMID TENSE ELECTION

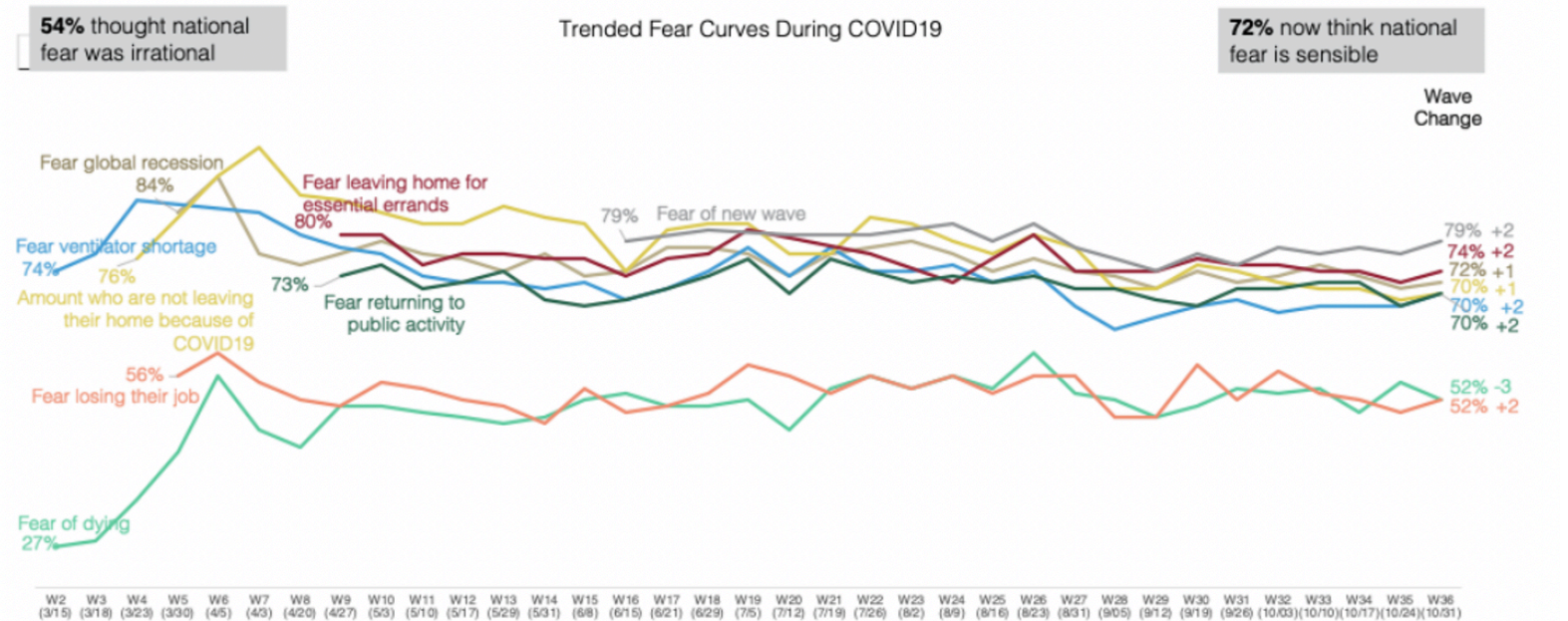
Introduction:

Nearly all aspects of fear rose this week, notably, the fear of another COVID-19 wave (79%) up two percentage points from last week as the [country recorded over 100,000 new coronavirus cases in a single day](#) for the first time since the pandemic began and [cases rose in 35 states in the last week](#). Five states — Maine, Minnesota, Indiana, Nebraska, and Colorado — set single-day case records.

In turn, many states have **brought back restrictions**; [Colorado moved the City and County of Denver to the more restrictive Safer at Home Dial Level 3](#), and Gov. Ned Lamont of Connecticut [rolled back restrictions to Phase 2 reopening](#), asking residents to stay home at night as the coronavirus outbreak continues. With the spike in cases, we see an increase of **public concern with leaving the house** (74%) and **returning to normal public activity** (70%).

THE HARRIS POLL: COVID-19 IN THE U.S.

The Task for Communicators: Lifting the Curtain of Fear



Section:

02

Topic:

BENEATH THE DIVISION AND ANXIETY IS A NATION THAT IS REFLECTING AND GIVING THANKS

Introduction:

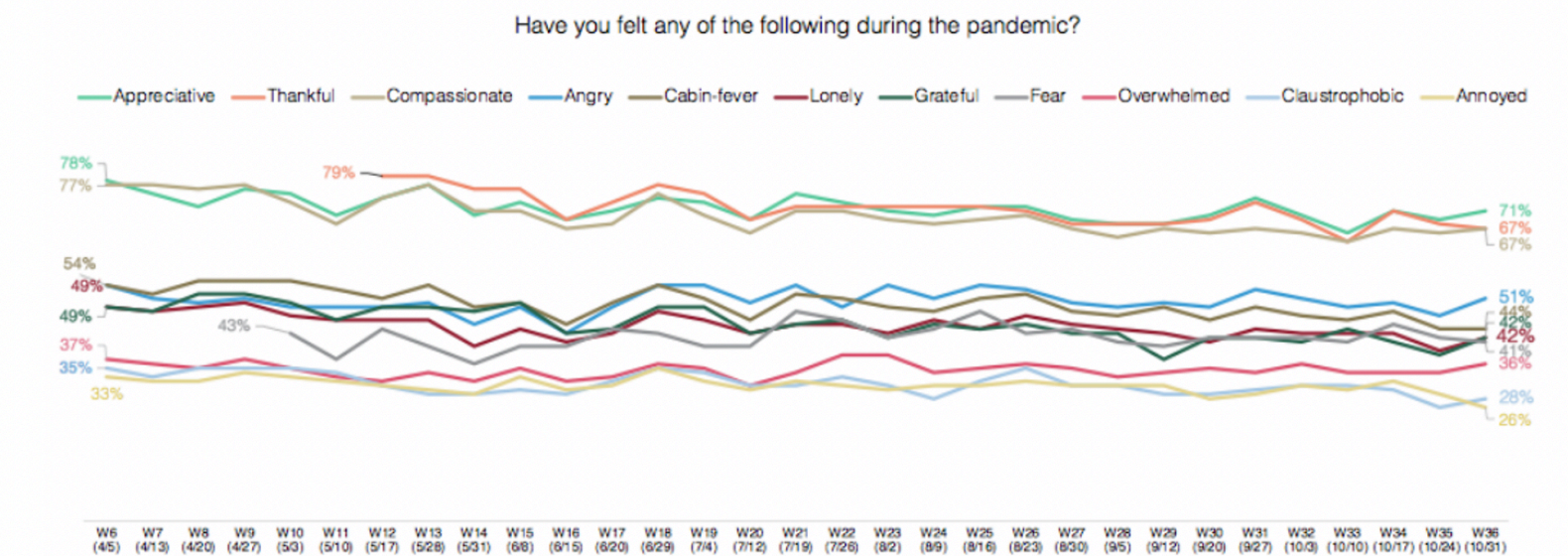
Amid one of the most trying times in our country with the pandemic and a divisive election, Americans are feeling **appreciative** (71%), **thankful** (67%), and **compassionate** (67%). More so than those who feel **angry** (51%) and **annoyed** (28%).

Looking ahead to Thanksgiving, Americans are planning to put politics aside and focus on what matters; Americans plan to cope with potentially heated political debates over their Thanksgiving meal by **agreeing not to talk politics at the dinner tables** (39%) and **changing the subject** (35%) - cheers to that!

What's more, is that this reflection of gratitude seems to be spurring **fundamental value shifts**: 76% say they will continue to **support charities** due to the pandemic in the future, 69% have an **increased appreciation of the outdoors** ever since lockdowns ended, and 43% say they will **stay more connected** to friends and family after the pandemic.

THE HARRIS POLL: COVID-19 IN THE U.S.

Beneath Anxiety, Reflection and Gratitude



Section:

03

Topic:

IT'S COVID AND THE ECONOMY, STUPID

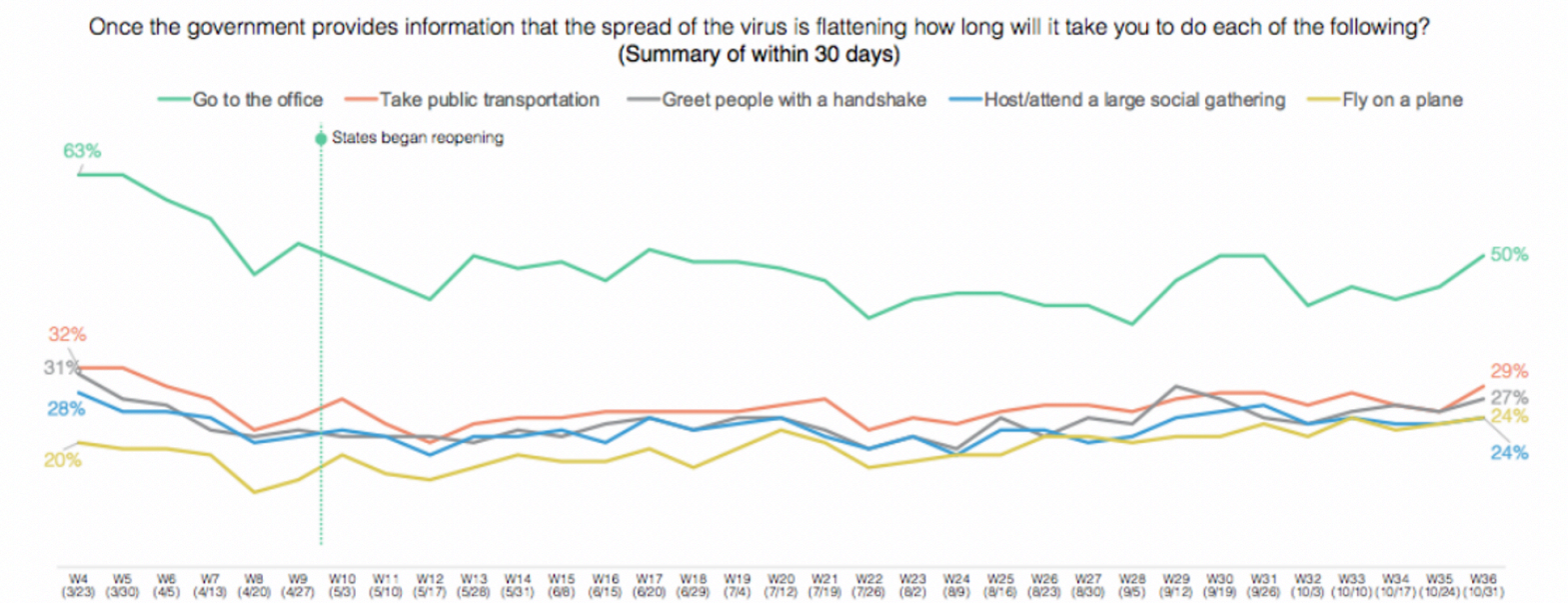
Introduction:

As American voters headed to the polls (and drop-off locations) these past few weeks, two interconnected issues were at the top of every mind: COVID and the economy.

- **Americans voted with their wallet because we still aren't out of the COVID recovery yet:** just over half (52%) of Americans still fear losing their job due to COVID-19 and 72% still fear a global recession.
- **How did Americans weigh the economy vs. COVID?** [The New York Times dives into the \(very early\) exit polls and concludes:](#) "The coronavirus dominated voters' thinking, but those concerned about rising infections sided with Joseph R. Biden Jr. while those who wanted the economy open went for President Trump."
- **But restarting the economy means re-opening businesses, something which states are forced to restrict due to COVID and something Americans are still quite wary about even after reports of the virus flattening:** only 39% say they will go out to dinner in the next 30 days of the virus flattening, less than a third (28%) say they will go to a gym class and only a quarter (25%) say they would go to the movies.
- **There is a ripple effect on supporting industries:** The slowdown of one industry says, business commuting, impacts all other supporting industries, in fact, [our study with TriNet](#) found six in ten SMB leaders (60%) have had to reduce their workforce in some way.
- **And Americans are worried about their communities:** nearly two-thirds (63%) say small businesses in their community are doing poorly and the same number (65%) say businesses in their community will eventually return to their normal, pre-pandemic levels. And half (50%) say a small business has had to close permanently in their community because of the pandemic.

THE HARRIS POLL: COVID-19 IN THE U.S.

Pause in Office Work and Commuting Has Economic Ripple Effects



Implication:

Either Biden or Trump will face an economy in shambles, a pessimistic public (54% would get a vaccine right away, down from 69% in early August, and on average Americans are saying it will be at least 6 months to return to normal activity once the virus flattens) and uncertainty on the horizon for months to come (about one-quarter of the public says it will be a year or longer before they go to a sporting event, attend a large social gathering, take public transportation, or stay in a hotel.)



WAVE 32

WAVE 32 INTRODUCTION

The following research was conducted between **October 22-24, 2020** by The Harris Poll. Fielded among a nationally representative sample of **2,050** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

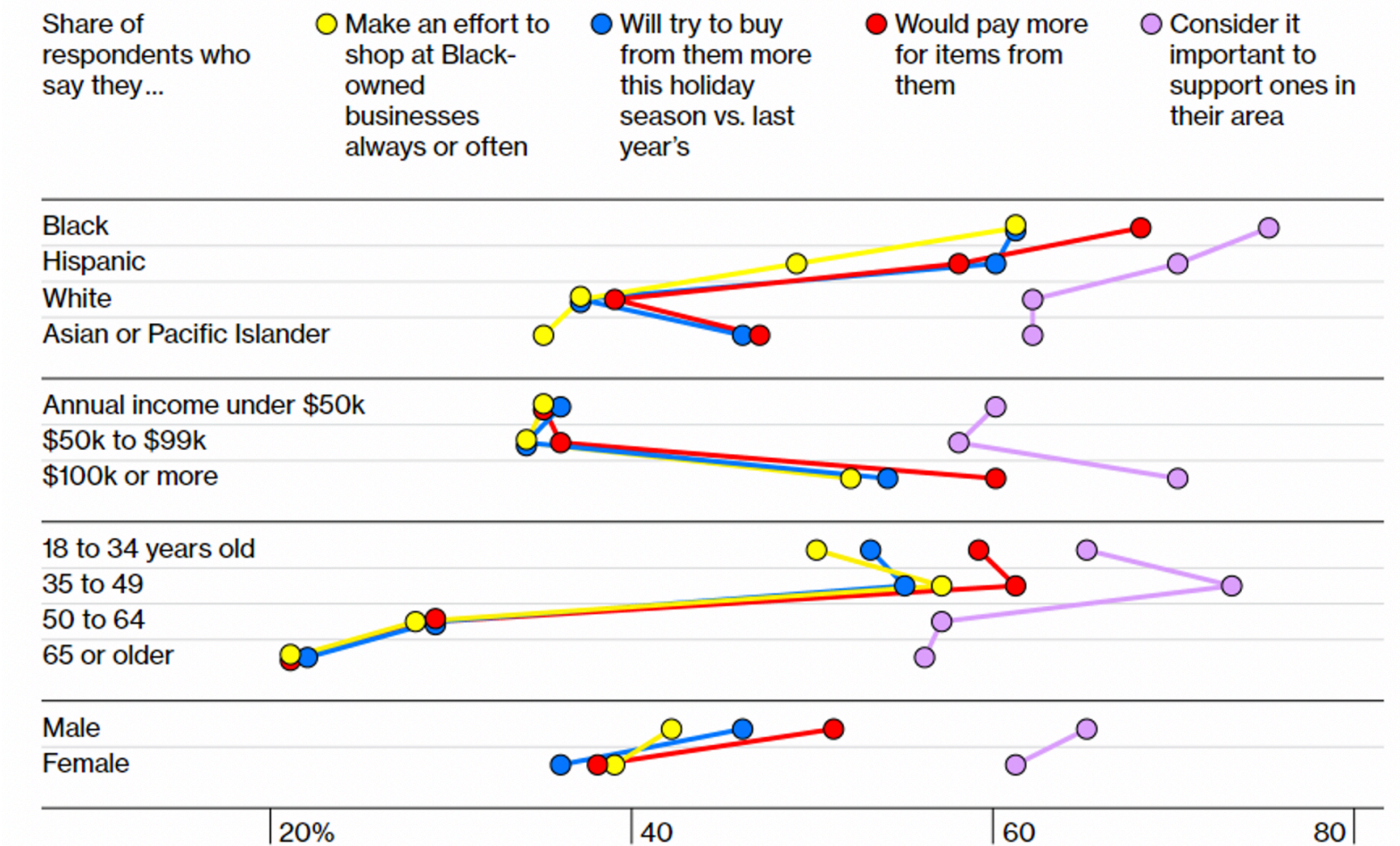
BLACK-OWNED BUSINESSES HOPE THE SUMMER BOOM DOESN'T FADE

Introduction:

#BuyBlack trended on social media this summer as consumers, encouraged by the Black Lives Matter movement, spent their dollars at black-owned businesses. In our [poll conducted with Bloomberg News](#), we looked to see whether BLM-inspired enthusiasm will spur a permanent change in shopping habits:

- A majority (63%) of Americans say it's **important to support Black-owned businesses**, and today search engines and apps such as [Yelp](#) and [OpenTable](#) are making it easier to do so by highlighting Black businesses on their platforms.
- Four in 10 (40%) of Americans say they are making more of a **conscious effort to shop at Black-owned businesses** compared to last year, including 61% of Black Americans, 49% of Hispanics, and 37% of White Americans.

Survey of U.S. Adults on Shopping at Black-Owned Businesses



Survey conducted Oct. 8-10
Data: The Harris Poll for Bloomberg

- In fact, data from our weekly research shows that since May, **those who say racial equality is important to them personally have increased significantly**, moving to nearly 9 in 10 (88%) today, up from 77% on May 22.
- What's more is that 77% say the **racial equality movement "feels different"** this time, and 43% say it feels different because **"There is more support from different groups of people than before,"** a sentiment felt even stronger among black Americans (53%). Another 36% of gen pop and 42% of Black Americans say it feels different because **"People outside the black community are finally trying to listen and understand the plight of POC."**
- Interestingly, 72% say they **trust companies more than the federal government to find solutions to racial equality.**

Implication:

Black small-business owners have gone from no revenue during lockdown to unsustainable demand over the summer and the holiday season will test long-term consumer support.

Section:

02

Topic:

AMERICANS SAY THE WORST OF COVID STILL AHEAD

Introduction:

Over the past week, there has been an average of 71,092 cases per day, an increase of 40 percent from the average two weeks earlier, as reported by the [New York Times](#). We checked in with Americans this weekend to get their outlook and mindset on the pandemic

- **COVID is not done with America:** More than half (54%) of Americans do not believe the worst of the virus is behind us in fact, two-thirds (66%) of Americans say the **worst of COVID-19 is still ahead of us**. Just over half (52%) say the COVID-19 pandemic is worse than they had expected it to be.
- **Fear is rising:** Nearly 4 in 5 (79%) of Americans are concerned about the rise in cases of COVID-19 and more than 4 in 5 (82%) are concerned that deaths will rise past 250,000.
- **Dreading a repeat of tragedies among the frontlines:** Today, **75% of Americans fear a shortage of healthcare workers**, and they have reason to; right now, the states seeing dangerous levels of hospitalizations are also where healthcare workers are scarce, notably rural parts of the Mountain West and the Midwest, as reported by [Kaiser Health News](#). As we know too well, front line healthcare workers must risk their own health to treat others, signaling worker shortages if they, too, become infected.
- **Hospitals face a familiar problem without a solution:** As hospitalizations rise so does the risk of **hospital bed shortages**, which 70% of Americans now fear. Take for instance the situation in Utah where the situation has become so dire that the Hospital Association [warned](#) that hospitals are expecting to begin rationing care within a week or two...

- **Preparing for another lockdown:** Right now 69% are staying home as much as possible and as the majority (80%) are concerned about case resurgence on college campuses, 78% agree with putting college and university campuses under shelter in place orders if there is an increase in cases of COVID-19 on campus.

Implication:

The country is facing a recurring nightmare unless action is taken to slow the spread, but faith is dwindling; in fact, nearly a third (31%) go as far as to say that COVID-19 will never be over. For those in need of positivity, check out [Just Give Me Positive News](#), which compiles stories on the pandemic each day that highlight the progress that is being made.

Section:

03

Topic:

VACCINE SKEPTICISM HAS ALREADY ARRIVED

Introduction:

A STAT-Harris Poll earlier this month and [cited in the New York Times](#) found that nearly three-fifths (58%) of Americans say they will not get vaccinated right away, a decline from 69% who said the same in August. Why are Americans so skeptical and who do they trust when it comes to a vaccine?

- **Government officials will need to earn the trust of more vulnerable and skeptical communities:** The STAT-Harris Poll found the decline was twice as steep among Black Americans: only 4 in 10 (43%) said they would get the vaccine right away, down from 65% in August. [The New York Times explains why this skepticism exists among Black Americans](#): during a Food and Drug Administration meeting last week in which experts asked Americans their views on a potential vaccine, they note “others said their skepticism had historical roots dating to the Tuskegee Syphilis Study, in which government scientists lied to Black men and allowed them to go untreated for syphilis.”
- **However, trust in the FDA remains high:** three-fourths (75%) of Americans say they are confident that the FDA will only approve a COVID-19 vaccine if it is safe, including two-thirds (67%) of Black Americans.
- **Who do Americans trust in the vaccine?** A STAT-Harris Poll found 83% of Americans trust doctors and nurses to provide accurate information on the development of a COVID-19 vaccine, while 81% trust nationally recognized hospitals like the Mayo Clinic and Cleveland Clinic, 80% trust scientists, and 79% trust their local hospital.
- [The Economist](#) looks at why anti-vaccination sentiments are more prevalent in rich countries than in poor ones.

Implication:

The U.S. government and scientific community will need to listen to and address any skepticism of a vaccine through transparency and testing if they are to win over these Americans and achieve herd immunity through a vaccine. If this skepticism is left unaddressed, then the development and approval phase of the vaccine may look easy compared to the administering phase.

Section:

04

Topic:

THE TURNOUT ELECTION

Introduction:

In May of this year, we asked Americans what impact the COVID-19 pandemic would have on the November presidential election and found 4 in 10 (40%) said it would lead to a decrease in voter turnout given safety concerns with voting in-person. As it turns out, the opposite is happening: as states expanded early and mail-in voting to avoid crowded polling places on Election Day, America is on track to have the highest turnout rate since 1908.

- [Financial Times puts the surge into perspective](#): “With a week to go until election day, the number of early votes in some states is on track to surpass the entire number of ballots cast four years ago.”
- **Support for vote-by-mail is high - as well as for it to continue post-pandemic**: In our polling, two-thirds (67%) of Americans approve of vote-by-mail for this year’s presidential election. And more than half (52%) of Americans support continuing to have the option to use vote-by-mail in future elections after the pandemic.
- **But like most of our politics today, there is a partisan - and generational - divide**: 7 in 10 (71%) Democrats support the continuation of vote-by-mail in future elections while only 4 in 10 (41%) of Republicans do. And nearly three-fifths (57%) of Seniors support its continuation vs. less than half (45%) of Gen Z/Millennials.
- **However, Americans still prefer the in-person experience**: 56% say they would prefer to vote in-person in future, post-COVID elections, with 69% of Republicans preferring in-person vs. 48% of Democrats.
- **And the record high turnout isn’t just because of mail-in voting**: [USA Today points out](#) that “Texas is breaking records despite not being among the states that expanded vote-by-mail amid the pandemic.”

Implication:

Historic turnout was likely always staring us in the face given the combination of a historic pandemic upending American life and a pivotal presidential election, leading many Americans to become more aware of, and engaged in, politics than ever before. But the expansion of early and mail-in voting also proves that when voting becomes easier, more Americans will vote.

Section:

05

Topic:

THE SUPER BOWL OF POLITICS

Introduction:

It's hard to believe, but we are less than one week away from Election Day. Despite three-fifths of Americans (57%) saying they anticipate the winner being announced later than usual due to mail-in ballots, nearly half (46%) say they will tune in on Election Night to see the results. We asked Americans how they'll be tuning in and what their night will entail.

- **Television's big night:** Nearly half (46%) of Americans plan to see the results of the 2020 presidential election on Election Night, November 3rd, while under one-quarter (23%) say they will see the results the next day. And among those who will be tuning in, 73% will be watching the results live on TV and/or catching the recap on TV. More than one-quarter (28%) will be on social media to see the results and 22% will be checking online news sources.
- **As the [New York Post](#) puts it: pull the lever and take a shot. Not all Americans will be sober for the results,** with half (49%) of Americans saying they plan to consume either alcohol or cannabis that night, including 62% of Millennials. What is the intoxicant of choice? One-quarter (26%) will be drinking beer, 23% will watch with a bottle of wine, 15% will be reaching for the liquor, and 13% will "go green" - consuming cannabis in some form. What else will be on the table? Nearly half (46%) will be having snack foods like pretzels and popcorn, while 42% will be having pizza and 28% dessert.
- **Alcohol and comfort food will help Americans cope on Election Night because of the stress that comes with it:** nearly half (48%) of Americans say they are more stressed about the upcoming election compared to prior years, while one-third (35%) say they are having the same level of stress. One-quarter (24%) say their level of stress and anxiety about the election is high, while 4 in 10 (41%) say it is moderate.

- Big election night parties may be on hold this year with COVID-19, but Americans won't be watching alone: **8 in 10 (81%) of those who plan to watch say they will be with someone else**, with 47% saying their spouse or partner, 22% their children, 18% their friends, and 17% their parents.
- **Which state will Americans be watching closely on Election Night?** Though [FiveThirtyEight currently has Pennsylvania as the "tipping point"](#), 42% of Americans say Florida is the most important state in determining the winner. More than one-quarter (27%) say Pennsylvania and the possible new swing-state of Texas.

Implication:

Unless you plan to be at [Trump International Hotel in DC](#), Election Night watch parties will likely look different this year. But as with many other social events of 2020, Americans will adapt and possibly start new traditions that they'll pick up in 2024.



WAVE 31

WAVE 31 INTRODUCTION

The following research was conducted between **October 14-17, 2020** by The Harris Poll. Fielded among a nationally representative sample of **2,015** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

A NEW APPRECIATION FOR THE OUTDOORS IS A BOON TO OUT OF HOME ADVERTISING

Introduction:

Our recent study with the Out of Home Advertising Association (OAAA) and [featured in Ad Age](#) found that out of home (OOH) advertisements have taken on a new resonance in the wake of the COVID-19 lockdowns. Even with winter approaching, Americans are turning to the outdoors for safety, sanity, and entertainment - presenting an opportunity for marketers to reach consumers.

- **COVID lockdowns gave consumers a renewed appreciation for the outdoors:** 69% of Americans say they have an increased appreciation of the experience and awareness of their surroundings when they are outside ever since lockdowns ended. And just under half (45%) say they are noticing OOH advertising (billboards, outdoor video screens, posters, and signage) more than before the pandemic. Not surprisingly, this is especially pronounced (69%) among those in urban areas of over 1 million people.

- **In uncertain times, consumers are grateful for information:** 38% say they found OOH ads to be useful because they provided them with information on COVID safety and hygiene, while 20% said they provided updates on the advertisers' business hours or services.
- **Digital Burnout:** Two-thirds (68%) of Americans say they have been spending so much time looking at screens that they tune out digital online ads.
- **Americans have turned to the outdoors to stay safe (and sane):** With many Americans working and/or learning from their home, 65% of Americans say they try to get out of the house as often as they can, even if it's just for a drive or a walk, another 65% say they have been trying to find safe outdoor activities to spend their time, and half (48%) say they have been trying to find new places to work from home or spend time outdoors. And 40% of Americans are walking more now than they did before the pandemic.
- **Americans will find creative ways to socialize safely this winter:** While 40% of Americans say they will stay in their home as much as possible as the colder weather months approach, 29% say they plan to find creative ways to socialize safely in-person this winter. Just under a quarter (23%) say they plan to live as normally as possible.

Implication:

Americans are seeking safety in the outdoors as often as they can, and 3 in 10 (29%) will continue to adjust to outdoor socialization during the winter months. With interest high in nearly all outdoor activities, and most Americans trying to find reasons to get out of their home – even if it's just for a walk – consumers are more receptive to OOH advertising given how the pandemic has made them more appreciative of the outdoors.

Section:

02

Topic:

AMAZON PRIME DAY LAUNCHES HOLIDAY SHOPPING SEASON

Introduction:

Prime Day, normally held on July 15, was delayed to October 13-14 this year and [many predict](#) this could single-handedly launch the holiday season forward with consumer spending moving online to avoid crowded malls and shopping earlier to avoid product shortages and delivery delays. This past weekend we tested these predictions:

- **Majority of Prime Day purchases were for the holidays:** 7 in 10 (70%) Americans who purchased items on Prime Day say they made purchases for the winter holidays. More than half of Americans (54%) participated in Amazon Prime Day, nearly a third (27%) purchased items and 38% looked at items.
- **Pandemic proofing purchases:** The top three purchases spanned core categories critical to helping consumers survive winter at home amid the pandemic which include electronics (49%), apparel (44%) and household appliances (36%).
- **Consumers also gravitated towards products that serve mind, body and spirit:** Over a third (36%) of purchases were in beauty/health, another 31% bought home decor, 26% books and a quarter (25%) bought exercise and workout equipment.

- **Shopping early amid delay concerns:** In general, more than 2 in 5 (44%) Americans are concerned that items they purchase online will not arrive on time and nearly 3 in 5 (57%) are shopping online early this year for the holiday due to concern of items arriving late.
- **“Out-of-stock” is becoming par for the course with online shopping during COVID-19:** Americans are hedging bets on delayed deliveries based on their own experience; just a couple weeks ago, [our study with Bloomberg](#) found a quarter (25%) said they have **encountered more trouble than usual finding certain items in stock** that they were hoping to buy in the past 3 months, today that number has increased to more than 3 in 10 (31%).
- **What’s in highest demand? Athleisure and tech (aka our COVID WFH survival kit).** The top 3 items they have had trouble finding include, Athletic clothes and gear (30%), Gaming consoles (29%) and Tablets (27%).
- **What’s more:** A recent [Salesforce report](#) found that as many as **700 million packages could face delays** if online orders exceed shipping capacity by the expected 5 percent.

Implication:

One thing is certain; the holiday shopping rush is going to be a test of Americans’ patience. Demand from online shoppers will continue to rise this holiday season (our survey with Bloomberg found almost half of consumers plan to do most or all of their shopping online) but it’s unclear how retail supply chains will be able to keep up as many don’t plan to ramp up production. Just take a look at [why there are still not enough paper towels in the U.S.](#)

Section:

03

Topic:

A PROGRESS REPORT FROM AMERICAN PARENTS

Introduction:

We are about two months into the school year and there have been a myriad of approaches to how schools' are responding across America as districts weigh decisions on in-person, online and/or hybrid learning. This weekend we checked in with parents to get a progress report:

- **Majority of parents approve of COVID school response, especially Moms:** More than two-thirds (68%) of parents whose kids are in school support how their children's school system is handling its response to COVID. Support is especially pronounced among moms (73%) vs. (63%) of dads.
- **Parents trust school reopening approach to keep them safe:** Nearly 7 in 10 (68%) of parents with a child attending in-person school say they are confident in their children's school system's approach to reopening in-person classes to keep their children and community safe.
- **But the threat of winter outbreaks is raising concern:** More than three-fifths (62%) fear a spike in COVID cases in their children's school this winter and three-quarters (73%) fear a spike in cases in other schools in their community. **Signaling fear of closures;** two-thirds (65%) of parents **fear that their children's school will be shut down and not stay open through winter.** Parents in urban areas (69%) are more fearful than parents in rural areas (59%).
- **As with many industries, COVID may be accelerating future trends:** 55% say online and hybrid instruction in education is likely to stick around for the long-term as a result of the pandemic.

Implication:

Right now, data suggests that schools haven't become the COVID hotspots that many feared, as reported by [Axios](#). But while it may not be as bad as some anticipated, the New York Times details how [schools with an outbreak are experiencing how quickly it can get out of control](#), which helps us empathize with the rise in parental stress across the nation as our data show.

Section:

04

Topic:

A NEW NATIONAL HOLIDAY

Introduction:

Early voting is underway and setting turnout records in many states, though many Americans will be casting their vote on Election Day itself. What if Americans didn't have to wait in line before or after work to vote in-person because companies gave them the necessary PTO - or it was a national holiday? We asked Americans how supportive they would be of these actions.

- **PTO to Vote:** A majority (63%) of Americans say businesses should give employees paid time off to vote on Election Day. Three-quarters (73%) of Higher Income Households (HHI \$100k+) are more supportive of such a measure compared to only 62% of Lower Income Households (HHI <\$50k).
- What do [Blue Apron](#), [Best Buy](#), [Lyft](#), [Twitter](#), and [Nike](#) all have in common? **They give employees time off to vote on Election Day.**
- Should Election Day be made a national holiday? **The same number of Americans (63%) support making Election Day a national holiday**, while just over half (51%) support moving Election Day to a Saturday. Younger Americans are most supportive of the new national holiday: 66% of Gen Z/ Millennials and 72% of Gen Xers vs. half (49%) of Seniors.
- **Both parties agree: this is the most important election of their lifetime.** Three-quarters (76%) of Americans say the 2020 election is the most important election of their lifetime, including 86% of Democrats and 78% of Republicans.
- Perhaps they think it is the most important because of what is at stake: nearly two-thirds (64%) of Americans **say if the candidate they are voting for in the presidential election loses in November, they think the country will be in danger.**

Implication:

Many Americans prefer to vote in-person on Election Day even when early voting is an option because of tradition, feeling their ballot is more secure, or something else. But whether it is working two jobs, taking care of parents or finding childcare on top of long wait lines, many voters have difficulty finding the necessary time to cast their ballot in-person on Election Day. Companies should encourage their employees to exercise their right to vote by accommodating them the time they need without jeopardizing their pay.

Section:

05

Topic:

FOOTBALL: BULLS VS BEARS

Introduction:

With the NFL entering its sixth week of the season following initial stumbles, the American public is growing bullish that the league will be able to complete its season amidst the pandemic. Now the spotlight turns to its college sibling, where two leagues are set to begin their season in the coming weeks even as players (and head coaches) from several high-profile programs test positive for COVID-19.

- **Americans are growing bullish on the NFL:** Nearly half (49%) of Americans believe the NFL will be able to complete their season successfully amidst the pandemic - up 13-pts from just two weeks ago, when just over one-third (36%) were optimistic. And more than half (54%) now say the NFL should complete their season given the pandemic, up from 45%.
- **But are more bearish on college football:** 2 in 5 (41%) Americans believe college football will be able to complete their season successfully, while just under half (47%) say they should complete their season and 36% say they should cancel due to the pandemic.
- With the Big Ten set to start their season this weekend and the Pac-12 following November 6th, **nearly half (49%) of Americans believe that the Pac-12 and/or Big Ten should postpone their season even further** given the recent surge in new COVID-19 cases.
- Around half (51%) of Americans think college football is more likely than the NFL to get their season canceled due to COVID-19, while just under a quarter (23%) believe the NFL is more likely to get canceled than college football.
- With head coaches at both Alabama and Florida testing positive and outbreaks among the team, [the New York Times](#) looks at how the conference is teetering on the edge.

Implication:

On Tuesday, [University of Michigan undergraduates were issued a stay in place order due to surging COVID cases on campus](#), though the order will not impact the Wolverines' travel plans to Minnesota this weekend to start Big Ten's football season. Colleges across America are experiencing surging COVID cases and, short of an NBA Bubble on every campus, they may not be able to keep athletes separated enough to finish their seasons.

Questions?

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KNOWLEDGE IS POWER
