

# COVID-19 CONSUMER RESEARCH EXECUTIVE SUMMARIES PART 4

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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 30

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## WAVE 30 INTRODUCTION

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The following research was conducted between **October 1-3, 2020** by The Harris Poll. Fielded among a nationally representative sample of **1,976** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

Topic:

## BLOOMBERG + HARRIS POLL EXPLORE HOLIDAY SPENDING AMID PANDEMIC AND TENSE ELECTION

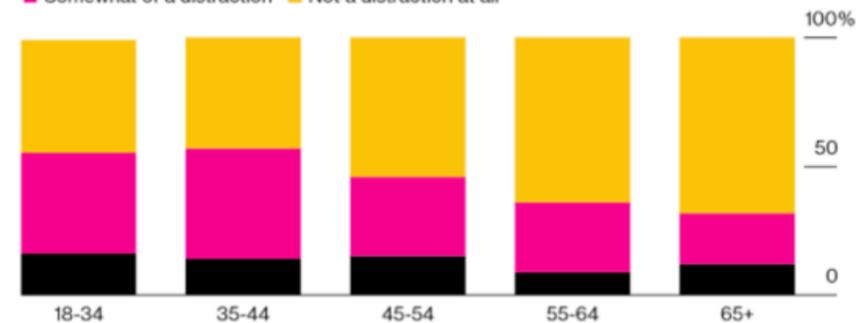
Introduction:

The Harris Poll new research partnership with Bloomberg finds that the 2020 election and Covid-19 are aligning to suppress holiday spending. The [Bloomberg Harris Poll survey released on Tuesday](#) found more than half of U.S. shoppers say they'll have less spending money this holiday due to the pandemic, while nearly 7 in 10 say the election makes them uncertain about the economy.

### October Surprise

Younger Americans say they're more distracted by the election

■ The election and related news coverage is a huge distraction to my holiday planning  
■ Somewhat of a distraction ■ Not a distraction at all



We also found that nearly half of consumers said they plan on doing their holiday shopping entirely or mostly online. That's up from 28% of consumers who said the same in 2019. Just 8% of shoppers plan to do their shopping entirely in person, down from 14% a year ago.

Also, more than three-fourths of consumers think **retailers should encourage consumers to shop online to deter crowds on Black Friday**, and just over half of Americans aren't planning to shop at malls or department stores this year.

Women are especially risk-averse to going into stores, with 82% of female shoppers concerned holiday shopping crowds may spread Covid-19 compared with 75% of men. About one in five U.S. shoppers took photos with Santa in 2019 but won't this year, our survey shows.

Implication:

This year we have these two forces in our way, interfering with our holiday. Throw in the virus-related recession, and you have this once-in-a-lifetime confluence of three events: the pandemic, the economic effect, and the instability of the election that's now just casting a pall over people's holiday planning.

Section:

# 02

Topic:

## THE LOOMING NFL CRISIS

Introduction:

After a Covid-19 outbreak caused Steelers vs. Titans to be cancelled and Patriots vs. Chiefs to be postponed a day this past weekend, we take a look at how fans' expectations for the NFL season are shifting as we pass the one-quarter mark of the regular season.

- **Despite players testing positive for Covid led to only two games being moved this past weekend, most Americans had already heard something about the NFL's troubles:** 61% this past weekend were aware. However, the coveted Gen Z/Millennial audience is the least aware: 53% have heard a great deal or some about the cancellations vs. 61% of Gen X, 64% of Boomers, and 66% of Seniors.
- **America is undecided on the future of the NFL season:** Just over one-third (36%) say they believe the NFL will be able to complete its pandemic season successfully, while a similar number (37%) say they are not sure. One-quarter (27%) do not believe the season will finish as scheduled.
- **There is both a gender and generational optimism gap:** 47% of men (vs. 25% of women) and 45% of Gen Z/Millennials/47% of Gen Xers (vs. 26% of Boomers and 20% of Seniors) think the NFL will be able to complete their season successfully.
- **There are few things Americans love more than football:** just under half (45%) say the NFL should complete their season amidst the pandemic while only one-third (32%) say they should cancel the season now as a precaution.
- Both the Patriots and the Titans games are in jeopardy this upcoming weekend as players on each team continue to test positive for Covid-19. [The Wall Street Journal](#) looks at the state of the NFL as the league struggles to prevent a full-on outbreak.

Implication:

If you think some of these findings sound familiar, it's likely because the MLB experienced similar stumbles at the onset of its season - leading us to ask Americans similar questions about the baseball season. The NFL will need to look to its sports counterpart for guidance, as the MLB was able to regain control and just finished its regular season as scheduled. We will see if the NFL will be able to do the same, [especially given the Florida governor's announcement this week that stadiums may resume full capacity crowds.](#)

Section:

# 03

Topic:

## AMERICANS WEIGH IN ON THE ROLE OF A VICE PRESIDENT

Introduction:

Ahead of last night's anticipated vice presidential debate between Mike Pence and Kamala Harris, we explored how Americans view the role of the office.

- Despite what [many of those who have held the office](#) think of the role of the vice president, a large majority (83%) of Americans say they believe the role of the vice president is important. Nearly two-thirds (68%) say the vice has influence over decisions made in America.
- Perhaps Americans say the role and influence of the vice president is important because the choice influences their vote in the presidential election: **69% of Americans say the vice presidential candidate has a great deal or some influence on their vote in a presidential election.** Though both parties say the VP candidate influences their vote, Republicans (36%) are significantly more likely than Democrats (25%) to say the choice has a great deal of influence.
- Nearly half of Americans (48%) said they thought last night's vice presidential debate this would do a better job addressing policies than last week's presidential debate, while only 12% think it will be worse and 40% say it will be the same.
- **Speaking of debates, Americans want one by the books:** 73% say they agree the debate commission should cut off the candidate's microphone if they break the rules and speak over their opponent. Democrats (84%) are more supportive of the rule change than Republicans (67%). Half (50%) of Americans say this rule change will make the next debate more informative and orderly, while only 28% say it will not, and 22% are not sure.

Implication:

Only 37.2 million tuned in to watch the 2016 vice presidential debate, roughly half the number of people who watched the presidential debates that election season, but our data tell us this election's vice presidential debate may be more important than ever before.

Section:

# 04

**Topic:**

## THE POINT OF NO RETURN TO THE OFFICE

**Introduction:**

Last week, companies such as Twitter and REI announced plans to allow 'Work from Home' on a permanent basis and more companies are likely to follow. Are most Americans past the "point of no return" to their office ... or are they eager to get back?

- **Americans want (the option) to work from home:** When asked if they were offered the option to work from home on a permanent basis by their employer, nearly all (85%) said they would accept it. **Hybrid Option:** Half (53%) would accept as long as there is work from home and office option. **Never Return:** 31% would accept the offer and never return. **Return:** Only 15% say they would prefer to return to the office as normal once it is safe to do so.
- **Don't Miss It!** Nearly three-fifths (57%) of those who have been working from home say they do **not** miss the office as much as they thought they would, while 4 in 10 (43%) say they are too distracted and bored at home. Women (65%) are more likely than men (51%) to say they don't miss the office as much as they thought they would, while Gen Z/Millennials (47%) say they are finding themselves missing the office vs. only 31% of Boomers.
- "Twitter's plans for work from home indefinitely have prompted a wave of copycats. But its transformation has been two years in the making — and the rest of America can learn some lessons," [writes The Washington Post as they explore the shift away from the office.](#)

**Implication:**

Remote work, as with many cultural and technological trends, have been expedited by the pandemic. As companies adapt to remote workers with various rates of success, we wouldn't be surprised if companies implement a hybrid option moving forward as a way to recruit and retain top talent as employees grow accustomed to lifestyle and location flexibility.

Section:

# 05

Topic:

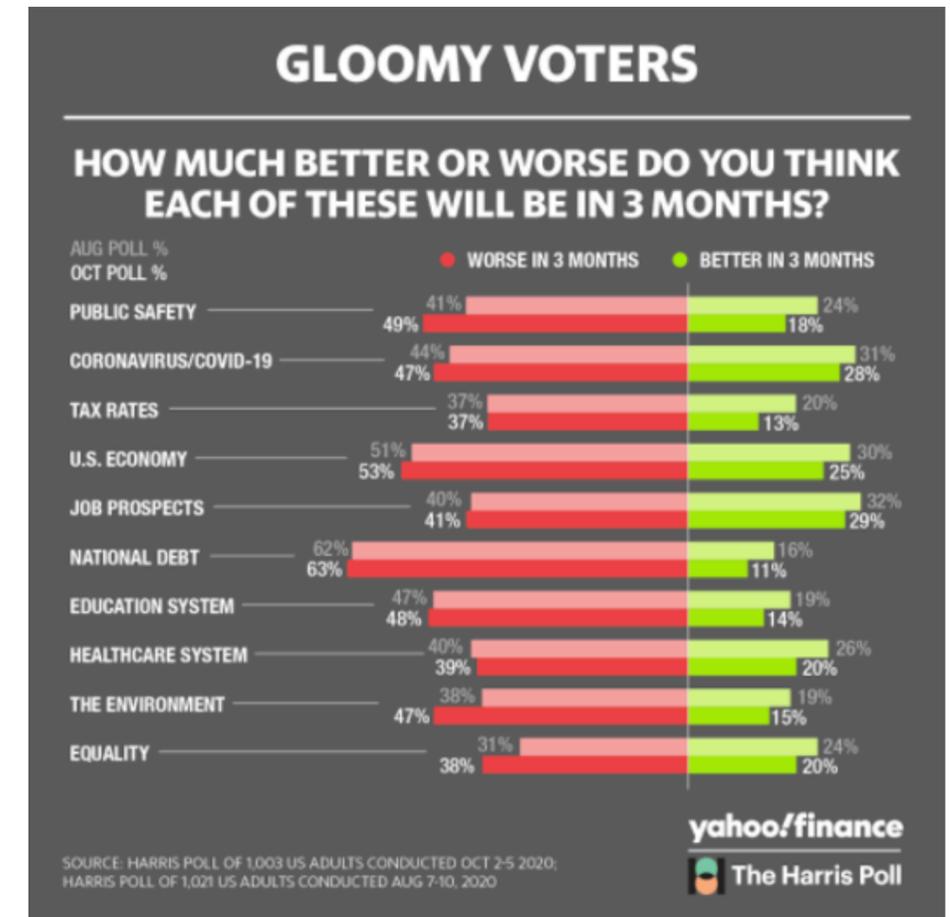
## WHAT ARE AMERICANS WILLING TO PAY TAXES FOR?

Introduction:

In an exclusive with [Yahoo Finance](#), Amir Kanpurwala, The Harris Poll Managing Director of Brand Strategy, breaks down the findings on American sentiment on taxes leading up to the presidential election.

- We asked people whether or not they think they're getting as much in value from the government as they actually put in from paying taxes. What did we learn? **Half say they are either paying about the right amount of taxes (30%), while 20% say they are paying less than their fair share.** Just over 4 in 10 (43%) say they are paying more than their fair share.
- **Despite conventional wisdom, most Americans would support higher tax rates if they are used for the right reasons:** three-quarters (75%) support a tax increase if it is used to ensure funding for government social services such as Social Security, Medicare, and food subsidies, while 68% support an increase to lower the national debt.
- **A Fair Tax?** Two-thirds (68%) of Americans believe the U.S. income tax system should be overhauled in the years ahead to ensure the richest Americans pay more than they are currently paying in taxes. And a plurality of Americans says people and corporations that largely avoid paying taxes are cheating the system (42%) vs. only 14% say they are being smart. One-third (34%) say it is a combination of both.
- **Americans are more pessimistic about the economy and Covid-19 than they are about tax:** more than half (53%) say the U.S. economy will be worse 3 months from now, while 49% said public safety will be worse, 47% said Covid-19 will be worse, 41% say job prospects will be worse, and 37% said tax rates will be worse.

- What's driving pessimism? Amir Kanpurwala suggests the **market volatility is weighing on American mindsets**: "People are very concerned about the US economy and about things like having a job, issues with the health-care system, public safety, so on and so forth. I think it's really just driven by the volatility that's happening in the marketplace."



Implication:

The economic impact of the pandemic has been devastating for Americans of all ages but has been particularly acute for near-retirees as they watch their retirement accounts depreciate or tap into their retirement savings as a lifeline. A secure retirement is part of the (new) American Dream, but the pandemic has put this out of reach for a good number of Americans.



# WAVE 29

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## WAVE 29 INTRODUCTION

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The following research was conducted between **September 24-26, 2020** by The Harris Poll. Fielded among a nationally representative sample of **1,971** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

**Topic:**

## HOP A FLIGHT TO NOWHERE

**Introduction:**

Last week, a [Qantas seven-hour flight to nowhere](#) sold out in 10 minutes. The inaugural flight performed a giant loop around Australia returning back to Sydney. (The first hint was the boarding pass said SYD to SYD). Not to be outdone, **Singapore Airlines (SQ) turned an Airbus into a pop-up restaurant** called [‘Restaurant A-380’](#).

- Look, many people miss flying: In our Harris Poll data this week, 77% of Americans said they would not be taking a flight within the next month. (It had been 88% on average most of this year). But 40% say they miss flying.
- Some might miss it too much: [Stir-crazy travelers are ordering airline food](#) from JetBlue and Garuda Airlines in Jakarta. According to the WSJ, “Erstwhile travelers snapped up 40,000 snack packs from Imperfect Foods that were originally destined for JetBlue and another airline, the retailer says. In Australia, in-flight catering company Gate Gourmet began selling meals online around June. At one point it sold out, but it has since replenished supplies in some cities, according to its website”.
- **Harris asked Americans and people are interested in a flight to nowhere:** More than 3 in 5 Americans (63%) would be interested in taking a flight that originated and returned to the same airport. Gen Z/Millennials and Gen X are more likely than Boomers and Seniors (69% and 73% vs. 60% and 46%)
- And of those who say they are interested in a flight to nowhere - they would be **willing to pay \$260**, on average.
- **People are looking for a “get-away”:** Those who say they are interested, say it is because...**We all need a moment of escape (53%)**; It would feel like a mini-vacation (52%); I need a change of scenery (44%); Satisfy my itch to travel (38%); I miss flying (28%); To offset my cabin fever (22%); to create a sense of normalcy (21%).

**Implication:**

**Normalcy is a new marketplace:** In our polling, 68% of Americans believe that travel will be very or somewhat different even after things return to normal. And this creates dislocation and uncertainty. So naturally, we pine for things that were not only banal in the halcyon days of 2019, but also just bad: speaking of deep-fried Oreos... [The Minnesota State Fair offered a drive by this year](#) allowing attendees to order cheese curds from their car. Minnesotans still rushed to buy tickets once they were available. All 19,000 tickets to the drive-thru fair sold out in 2.5 hours, organizers said.

Section:

# 02

Topic:

## TEACHERS ARE THE NEW FRONTLINE HEROES

Introduction:

Early in the pandemic, we celebrated our nurses, doctors and hospital staff for their fearlessness and sense of duty. And as the crisis ensued, [our research showcased the front-line workers](#) who kept the economy humming; people like grocery, gas stations, utility workers. We described them as the 'new face of patriotism'. Now with school back in session both on and off-line, our new research shows overwhelming support for teachers whether they are in the classroom or reaching through screens to teach kids:

- Huge majorities respect teachers and see them as the new heroes of the pandemic: 89% of Americans think teachers are doing the best they can during the pandemic and 88% say teachers are trying their best to make online learning work.
- Moreover, 82% say teachers are not appreciated enough for what they do. And an equal number say teachers are the new front-line heroes of the pandemic.
- Teaching has always been selfless, but Americans appreciate the fearlessness this year: 84% say **teachers have had to put aside their own fears in order to do their job**.
- A lower, yet still strong majority (70%) of Americans **support teachers going on strike** to protest school re-openings they think are unsafe. And as [NYC school principals vote 'no confidence' in Mayor de Blasio](#) over reopening plans, 57% say they have not heard about a possible NYC teachers' union strike.

- **Parents have strongly positive views of their kids' teachers:** 87% of parents who have a child currently in school say that they have a favorable impression of their kid's teachers.
- **Students like their teachers too:** While the Harris Poll surveyed only adults, there were still 319 Americans who identified themselves as currently being students; of those, 67% had a favorable impression of their teachers compared to 33% with an unfavorable one.
- **Strong belief in teachers to make do online:** In our poll earlier this month, 62% of parents said **conducting school virtually is "going to work"** for the remainder of the school year while just 38% said this is "not going to work."
- **Americans would rather have their kids home.** In our new [Harvard CAPS/ Harris Poll](#), while 60% of Americans say they/their families are going to work and school, a majority of voters (57%) say kids should stay home from school, and prefer not to send children to school given the current situation.
- **Americans see the risk that teachers are taking.** In our Harvard-Harris Poll, **they would support another shut down:** Two-thirds (66%) of voters are more concerned with opening too soon and 60% would support shutting down the economy again in the event of a surge in cases.
- **As such, Americans say teachers need more support to make virtual learning work:** Well functioning technology (67%); Training on how to use online platforms, develop and implement online classes (66%); Additional funding/resources to help teachers execute virtual courses (e.g., computers, high-speed internet, video cameras, etc.) (61%); Student engagement as well as parent involvement (60%); Explicit instructions for parents/students (54%).
- Listen to this NPR Storycorps story: [Under Pandemic Stressors, NYC Special Ed Teams Vow To 'Put The Children First'](#).

Implication:

As COVID cases trend upward in many parts of the U.S., attributable in part to school and college reopenings, teachers are not only fighting the nation's interrupted childhood development but they also risk their health to provide the empathy our nation so desperately needs. Let's put our teachers first: for vaccines, for better pay and benefits, for our respect alongside our other frontline heroes.

Section:

# 03

Topic:

## ELECTION... WEEK?

Introduction:

While Joe Biden and Donald Trump faced off in the first presidential debate last night, voting is already underway across much of America. This election year, all eyes are on vote-by-mail as Americans opt to mail in their choice to avoid the long lines at the polls during the pandemic. But there is pessimism that we may have to wait to determine who the winner is until these votes are counted.

- Voting has already begun: In our recent [Harvard Harris Poll](#), **a plurality of voters (40%) say they will be voting by mail this year** - and 19% have already mailed their ballot. One-third (33%) say they will vote in-person on Election Day, while 27% say they are voting in-person before Election Day.
- **Will Election Day turn into Election Week... or Month?** With some models showing a close election, Americans are preparing for a delay in announcing the winner as the influx of mail-in ballots are counted: nearly three-fifths of Americans (57%) believe mail-in ballots could delay the time in which the November election results are announced. Republicans are more likely than Democrats to think there will be a delay (70% vs 53%).
- **When will we know?** Just over three-fifths (62%) are concerned that due to mail-in ballots, the November election will be announced later than they have been in past elections. Only 1 in 5 (20%) Americans think we will know the winner on Election Day (11%) or the day after (9%). Slightly more (22%) say we will know sometime that weekend.
- Despite causing a possible delay, **vote-by-mail remains popular**: In Wave 25 of our COVID Tracker, two-thirds (67%) approve of vote-by-mail this election, including (51%) of Republicans and (86%) of Democrats.
- **Did you know:** Five western states - Oregon, Colorado, Utah, Hawaii, and Washington - have conducted their elections for years almost entirely by mail. [Vox explores how Oregon adopted the vote-by-mail system.](#)

Implication:

Mail-in voting is popular and comes with many benefits - especially during a pandemic - but speed is not one of its features. Depending on how close the election is, Americans may need to prepare for a drawn out Election Week as ballots are counted (and likely contested). The Wall Street Journal [offers a guide to possible delays.](#)

Section:

# 04

Topic:

## THE TWO VACCINES

Introduction:

Flu season 2020 is here and, despite repeated and early warnings from the healthcare community, only about half of Americans say they will get their flu shot this year. Experts worry that the two viruses could exacerbate one another, with flu patients occupying critical space within hospitals. And an increasing number of Americans say they are not likely to get their COVID vaccine either.

- “**This could be your most important flu shot ever**”: [Despite health officials stressing the outsized importance](#) of receiving a flu shot this year given the simultaneous viruses, only about half (56%) of Americans plan to get their flu vaccine for the 2020-2021 flu season, with 45% saying they plan to and 11% having already taken the vaccine. Slightly more (62%) plan to or have already had their child(ren) vaccinated: 39% of parents say they are going to, while 23% say their child(ren) have already received the shot.
- **Will a vaccine get us to herd immunity?** Only half (54%) of Americans say they will get the COVID vaccine as soon as it becomes available, down from 7 in 10 (69%) on August 16. Despite some partisan tensions in recent weeks over a vaccine, 60% of Democrats say they are likely to receive the COVID vaccine vs only 53% of Republicans. And three-fifths of parents (58%) say they will give their child the COVID vaccine as soon as it becomes available.
- Enough people taking an effective vaccine is our only hope of returning to normal. So why are some Americans not likely to take a COVID vaccine? Some are skeptical that it could be rushed due to political motivations: three-fifths (58%) are **not confident the federal government's approval of a COVID-19 vaccine will not be motivated or influenced by politics**, including 64% of Democrats and 47% of Republicans. Seniors, the most vulnerable generation, are also the least confident: 67% say they are not confident vs 53% of Gen Z/Millennials. And three-fourths (75%) of Americans say they worry the approval process is being driven more by politics than science.

- Despite [Anthony Fauci saying he is “cautiously optimistic”](#) about a vaccine being approved by the end of 2020, **some Americans are cautiously pessimistic**: nearly 4 in 5 Americans (79%) say if a COVID-19 vaccine is approved quickly, they would worry how safe it is.
- Americans want to see backup validation: nearly two thirds of Americans (65%) believe the states should conduct their own review process of any COVID-19 vaccine, even if the vaccine is approved by the FDA.

Implication:

Distrusting the government is an age-old American tradition. But in order to return to normal life, the government will need to convince a skeptical public that a vaccine is trustworthy and was not rushed to score political points. Corporate America may need to play a role in boosting public confidence. In fact, [the pharmaceutical industry recently pledged to “stand with science”](#) to help build trust.

Section:

# 05

Topic:

## A LOOMING RETIREMENT CRISIS

Introduction:

The stock market may have bounced back quicker than many anticipated following its March crash, but many near-retirees continue to worry about their 401k and retirement - with many having to delay their retirement plans as a result of the pandemic. And this isn't even their first retirement crisis: many were only recently recovered from the 2008 financial crisis.

- Nearly all Americans (85%) have been impacted financially in some way by the pandemic, **with 3 in 10 (29%) having stopped or cut back on retirement savings** and one-third (32%) say their household income this year will be lower than last year.
- **COVID is delaying retirement for nearly one-third:** When asked if the COVID-19 pandemic had caused them to re-evaluate their retirement plans, a full (30%) of non-retired Americans said that yes, they were pushing back retirement. Half (56%) say there had been no change to their plans, while 14% have decided to retire earlier. **High earners were actually the most likely:** to say they were going to delay retirement (38%), perhaps indicating that the recent volatility in the stock market has caused them to re-evaluate how much they'll need to retire comfortably.
- **Two-fifths of Americans don't think they'll be able to retire when they want:** While three-fifths (59%) of Americans say they anticipate they'll be able to retire "when they want", 4 in 10 (41%) do not believe that will be the case. **Those nearing retirement age are the most nervous:** 46% of those aged 50-64 say they don't think they'll be able to retire when they want.
- **These near-retirees are still recovering from the last crisis:** [According to Barron's](#), "for near-retirees, the Covid-19 recession marks the second major setback in little more than a decade—and this one strikes as many are hitting peak earnings and savings years. Now, they find themselves grappling with ways to preserve their retirement security—with fewer years to bounce back."

Implication:

The economic impact of the pandemic has been devastating for Americans of all ages, but has been particularly acute for near-retirees as they watch their retirement accounts depreciate or tap into their retirement savings as a lifeline. A secure retirement is part of the (new) American Dream, but the pandemic has put this out of reach for a good number of Americans.



# WAVE 28

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## WAVE 28 INTRODUCTION

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The following research was conducted between **September 17-19, 2020** by The Harris Poll. Fielded among a nationally representative sample of **2,037** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

**Topic:**

## STREAMING INTO AUTUMN

**Introduction:**

As COVID stretches into the fall, Americans are planning on streaming movies (49%) and tv shows (45%) that have been released but they haven't seen yet. Here's what else is happening in the stream queue:

- **Election 2020:** More than 2 in 5 Americans (44%) plan on watching the election night results in November with 42% planning to watch the fall Presidential debates. Both events ranked high in terms of what Americans are **excited** to watch.
- **Brady the Buccaneer or LeBron the Laker?** Despite LeBron James possibly on the verge of his tenth appearance in the NBA Finals - and first with the Los Angeles Lakers - a third (33%) of Americans plan on watching the NFL's regular season compared to only a quarter (25%) planning to watch the NBA Finals. The World Series (23%) and Stanley Cup (14%) see slightly less enthusiasm.
- **A New Era for Late Night:** Since the pandemic, late night TV shows and other popular talk shows have repurposed shows in a virtual world with social distancing in mind, which is proving to be a success. Trevor Noah, reframed his show as 'The Daily Social Distancing Show' from his sofa in lieu of the usual Daily Show, and 40% of Americans say they like the show even more now that it is virtual (especially men (46%), Gen X (49%), and Gen z/ Millennials (45%)). 40% of Americans say the same for Last Week Tonight with John Oliver, Conan (38%), The Tonight Show Starring Jimmy Fallon (36%), The Late Late Show with James Corden (36%), Jimmy Kimmel Live! (35%), SNL (34%), The Late Show with Stephan Colbert (34%).
- **New battleground for streaming wars - price:** In April, our survey with the [Wall Street Journal](#) found a surging demand for streaming services right after COVID hit (30% of Americans reportedly bought Netflix subscription in March alone), but entertainment executives warned a recession could make it even tougher to persuade consumers to pay for subscriptions, but streaming prices continue to rise now diminishing its competitive stance as a cheaper alternative to the old cable television package...

**Implication:**

Just two weeks ago, more than 3 in 5 Americans (63%) said they are coping with any stress and anxiety during COVID-19 by watching TV. And as colder weather approaches with the persistent threat of COVID, these feelings will likely only intensify, increasing the demand for streaming content that provides relief and is affordable.

Section:

# 02

Topic:

## SHOULD BRANDS BE POLITICAL?

Introduction:

As more brands speak out on social issues, some find themselves 'accidentally differentiated' by politics. In August, Montauk Brewing displayed a chalkboard sign outside their tasting room supporting Black Lives Matter, only to [face a community wide boycott](#). As the NY Post reported, Robert Frank, a police officer in Suffolk County, LI and his real estate agent wife Valeria Frank formed the Facebook group "**Defund Montauk Brewing Company**". The group currently boasts nearly 30,000 Facebook followers.

Given that cautionary tale, we asked Americans this week about how far brands should go in being overtly political. Should a brand be red or blue or just stay out of the political fray entirely? Most Americans say the latter:

- **There's an even split on if brands and companies should endorse candidates:** Like everything else that's divided down the middle in America, nearly half (49%) of Americans agreed that **companies and brands should endorse a specific candidate** if they share the company's values, but a slight majority (51%) disagreed.
- **But young people want companies to take a stand:** Nearly two-thirds (62%) of Gen Z/Millennials were in the pro-endorsement camp, showing a desire for more politically active brands compared to 40% of Boomers and 37% of Seniors. (Apparently The Woodstock Generation now have McMansions and Bentleys).
- **Big differences by party:** 61% of Democrats agree companies should publicly endorse political candidates, while 44% of Republicans agreed. Independents most want companies to stay out of it (41%), 59% disagreed with brands endorsing candidates.
- **Companies risk blowback:** Two-thirds (65%) of Americans say **they would be likely to boycott a company that took a strong political stand that they disagree with**, including 67% of Democrats and 69% of Republicans. In a recent polling, we found 39% said they were watching less NBA playoff games and the number one reason cited: 38% said **the league was becoming too political**.

- **Get in or stay out?** In our August Harvard CAPS/Harris Poll, 45% said they would buy goods and services from a company that takes a public stance on social and political issues, while the majority (55%) **think businesses should stay out**. And two-thirds (66%) said **they are being politically correct and not authentic**.
- **Why speak out?** 79% of Americans expect a **company's leadership to respond to COVID-19 and racial inequality** and 81% feel even if a company stumbles it's important to see how they think and what their intentions are. Importantly here, both of these social issues were issues Americans roundly supported.
- **Good intentions:** The public increasingly assumes good intent from business, and often sees how they can impact that good behavior: 64% agree that companies care about the well-being of their customers (+7% from 2017) and 63% believe they can influence companies to do better by buying from them when they do (-2% from 2017).

Implication:

So stay out of politics, right? Well, generally yes if you don't want warring camps of boycotters and supporters among your customers. But the real answer is more nuanced: If positioning is the art of sacrifice, savvy brands are willing to engage with their core audiences at the expense of the general public to create greater engagement, especially among youth: [Nike's Colin Kaepernick ad had this effect in our polling](#). But ignoring social issues comes at a cost as well. 72% of Americans said speaking out shows a company is living up to their internal values. Employees are often driving a firm to speak out and many CEOs see their people as important, if not more than their customers.

Section:

# 03

**Topic:**

## WILL WE COME IN FROM THE COLD?

**Introduction:**

As much of the country shifted to accommodate new safety measures like outdoor dining during summer, we conducted polling to see what Americans will be comfortable with in the winter.

- **Promise of the 'bubble':** When thinking ahead of summer and being indoors more, Americans are most comfortable with socializing with **friends and family indoors** (72%). What can we learn from the NBA's bubble strategy? Here's the [account of one reporter who spent 59 days in the NBA bubble](#).
- **Getting used to the new normal:** From half empty bars to hairdressers in face shields, the reopening of indoor businesses has been far from normal. But it seems Americans are becoming more comfortable living in the new normal (56%) saying they would be comfortable going to a hair salon, shopping at a mall and eating at a restaurant this fall.
- **The gym remains a scary place:** Today, nearly 6 in 10 (57%) say they would not be comfortable going to the gym - showing little change from American sentiment in May when (83%) said they are more likely to exercise at home post COVID-19 than go to a local gym... Which might explain why [Peloton's Stock Rose Even as the Market Crashed](#), as reported in The Motley Fool.
- **Meanwhile, concerns rise that Americans will let their guard down on safety precautions:** Nearly 4 in 5 Americans (78%) are concerned people will start relaxing their stance on COVID-19 safety precautions this winter. Seniors are more likely than Gen Z/Millennials, Gen X and Boomers (86% vs. 78%, 76% and 75%). Democrats are more likely than Republicans (90% vs. 75%)

**Implication:**

Americans are coming to terms that life will not be returning to the way it was anytime soon, signaling a slow departure from the flight or fight mode we were living under when COVID first hit. Consumers are adapting and finding new ways to socialize, work, travel, shop etc. which means business too must continually adapt their products and services to cater to the new agile consumer.

Section:

# 04

**Topic:**

## THE HIDDEN PSYCHOLOGY OF POLITICAL MEMES

**Introduction:**

If you think political memes are ubiquitous this election year, you are likely correct. Last week, [our exclusive poll with Fast Company](#) found that more than half (55%) of Americans have shared a political meme in just the past three months.

- **How can we tell it's an election year?** More than half (54%) are sharing more political memes on social media than they were a year ago, and one-fifth (21%) are sharing once a day or more often.
- **It's not just young Americans:** While 72% of those 18-34 have shared a political meme on social media in the past three months, 72% of those Age 35-44, 54% of those Age 45-54, and 45% of those Age 55-64 have shared a political meme recently.
- However, it's not always because we are trying to convince others: **4 in 10 (39%) say they are sharing the meme because they find it amusing.** Just under half (46%) say it is to let people know where they stand, while 27% share memes to change the minds of those who disagree and 24% say it is to convince others their position is just.
- **Facebook is the Battleground Platform:** Among those that have shared a meme in the past three months, **nearly all (90%) have shared a meme on Facebook**, while two-thirds (66%) have shared on Instagram, three-fifths (59%) have shared on Twitter, 45% have shared on Snapchat, and 39% have shared on TikTok.
- **The Meme Wars:** With direct personal contact with voters limited because of the pandemic, **campaigns are trying to reach voters by meme.** [Vox dives into the Biden campaign's influencer strategy](#), noting "a host of other groups are also enlisting influencers and meme accounts to boost Democratic turnout in November."

**Implication:**

Love them or hate them, memes are increasingly an important way people - especially younger generations - communicate online. And it's not just for politicians: winning over consumers by meme is an increasingly important part of every brand's online strategy. Bud Light is even hiring a new type of "CMO": [Chief Meme Officer](#). However, simply because a new meme went viral isn't an open invitation for brands: as one social media manager puts it: "It's really easy for [Gen Z] to sense when a brand isn't being authentic or trying too hard and [some brands will] miss the mark because they think 'this thing is trending, I need to hop on it right now,' even when the connection doesn't make sense for them."

Section:

# 05

Topic:

## CONVENTIONS: THEY'RE NO LONGER CONVENTIONAL

Introduction:

Since the pandemic struck Chicago six months ago, McCormick Place — the largest convention center in North America — has been a ghost town. Trade show associations and exhibitors across the country have been battered. We work with their industry association and our data says that attendance may never fully rebound, but most people who traveled to trade shows before the pandemic say they'll be back.

- In a new [Harris survey featured in the Chicago Tribune](#), a third of respondents (36%) say they'd be comfortable driving to an in-person event now and more than half (54%) if the convention site imposes risk-reducing requirements like face masks, temperature screening and social distancing.
- We also found that four in 10 (43%) said they had attended an in-person trade show, expo, conference or convention prior to the pandemic, with three-quarters (73%) saying they had gone to as many as five events in 2019.
- **What attendees miss:** Community (38%), networking (37%) and knowledge transfer (37%) are more important to business events since COVID as people are limited to virtual gatherings. Near the same amount (30%) say socializing is more important, and in a virtual world, people say experiences and engagement matter more (57%).
- **Why trade shows matter:** Based on economic impact studies by Choose Chicago, the city's business-promotion council, the MPEA had projected that the greater McCormick Place **would normally pump \$2 billion into Chicago's economy this year**; it would also support more than 15,000 full-time jobs and fill an average of almost 4,000 downtown hotel rooms each and every night.

- **That impact never materialized.** Since mid-March, organizers **have called off 150 gatherings** including the International Manufacturing Technology Show, which had expected to bring 129,000 people to Chicago last week. **The loss of tens of millions of dollars of tax revenue** from these mass meetings is one reason the city's budget deficit has swelled to \$800 million this year and, with program cancellations already extending into 2021, could deepen to \$1.2 billion next year.
- Asked when they'd feel comfortable driving to another city to attend an in-person trade show or convention — and this was without conditions such as having a widely available vaccine — 36% said immediately while 25% said within six months. The numbers drop somewhat when asked about flying to such a mass meeting, to 14% immediately and 26% within six months.
- Generally, **respondents said they prefer smaller gatherings.** A quarter (24%) would be comfortable in a room with 50 people or fewer. Just as many, though, would be comfortable among 500 people or more. And interestingly, 16% say they'd attend a trade show or conference if their bosses required them to. Still, 14% said they would not feel comfortable attending any in-person event under any circumstances if they were permitted now.
- Here is a [new trends presentation](#) we gave to CEIR, the national conference industry yesterday as well as [a strategy presentation](#) featuring data on B2B customer attitudes toward attending events.

Implication:

All return to conference industries relies on rapid testing and the success of Fall professional sports. Building trust in those face-to-face gatherings is vital: By a margin of 2 to 1, respondents prefer in-person events over virtual events because they're better for such things as networking, socializing, new product tryouts and business leads. For now hybrid off and online models, local gatherings, smaller audiences, conference 'bubble's are the new norm.



# WAVE 27

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## WAVE 27 INTRODUCTION

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The following research was conducted between **September 10-12, 2020** by The Harris Poll. Fielded among a nationally representative sample of **2,037** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

Topic:

## IS THE CEO A TWO-PERSON JOB?

Introduction:

[In our essay in HBR](#) this week, we advocate for more power-sharing at the top.

While there are many capable women and men running solo at the top, there are also many arguments for plural power, including expanding responsibilities and size of management teams along with more inclusive voices participating in management, making a single leader's personality and skill set often too narrow to rise to the task of leading while covering enough ground quickly. We write, "The modern business landscape is too fast-moving and the demands on a CEO have become too innumerable for a single person to set an organization's strategic direction and oversee a multitude of internal decisions, all while acting as its public face to stakeholders".

But there's also a practical consideration in understanding your weaknesses and matching with new strengths. "The profound shift to inclusivity in business demands that leaders broaden their skills and competencies. Some organizations may be fortunate and find that unique individual who is both right- and left-brained, who is both single-minded and collaborative, etc. For all the rest, the better alternative is two leaders in the role. CEOs need not be perfect if they have a partner who complements them".

Done right requires clear lanes of responsibility and reporting and constant communication, but most of all a belief in the character of the other to own both successes and failures together.

See our [full HBR piece here](#) or on our [website](#).

Section:

# 02

**Topic:**

## MORE AMERICANS BELIEVE CLIMATE CHANGE IS REASON FOR WILDFIRES, BUT UNCERTAINTY EXISTS

**Introduction:**

Wildfires have ravaged the U.S. west coast burning millions of acres of land, destroying thousands of homes, and costing lives. While many of those living in California, Oregon, and Washington face the unimaginable, there is a debate brewing across America as to whether or not the wildfires are caused by climate change. This weekend we asked Americans what they think:

- Americans are tuned in and concerned: Nearly 8 in 10 Americans (78%) have seen, read or heard a great deal/some about wildfires here in the U.S., and 82% are concerned about the impact of these wildfires.
- Nearly half (48%) think the increase in wildfires in the U.S. is **being caused by climate change**, but 30% say climate change is not the reason, and 22% are still unsure.

- Among those who say climate change is the cause, 56% live in the West, 50% Northeast, 46% South, and 40% in the Midwest. Gen-X (56%) is the only age group where a majority say 'Yes', climate change is to blame for the increase in wildfires, compared to Gen Z/Millennials (49%), Boomers (39%), Seniors (46%).
- Those most likely to be not sure include Suburbanites (25% vs. 19% of Urbanites), and women (26% of vs. 19% of men).
- The debate about whether climate change is causing the wildfires is split along political lines, with 60% of Democrats saying it is to blame compared to 35% of Republicans and 47% of Independents. It has also become a **new issue in the 2020 presidential election** that until now has been dominated by the coronavirus pandemic, a faltering economy and racial justice protests, as reported by [The Washington Post](#).

**Implication:**

While uncertainty lingers around whether or not climate change is the cause of the wildfires, people are very alarmed and looking to leaders for solutions, meaning this could be a deciding factor for the 2020 election.

Section:

# 03

**Topic:**

## HEY OLD PEOPLE, NOT ALL KIDS ARE SUPER- SPREADERS

**Introduction:**

You've seen the images of packed off-campus parties; young people without masks socializing with abandon. But don't be so quick to mischaracterize an entire generation from media clips. **Our Harris Poll survey with the Center for Disease Control Prevention** who consulted on the questions that was conducted among 1,048 U.S. teens and adults ages 16-23 and [featured in Axios](#). Our data debunks the stereotype of careless, maskless, inebriated youth we see in the media:

- **Compliant rather than reckless:** Nearly 8 in 10 (79%) Gen Zers say they **are strictly following mask-wearing guidelines** and are actively urging others to do the same, and 83% say they are following safety precautions to save their future.
- **Selfless rather than selfish:** Gen Z reported **being most stressed out about the health of their family members** and their friends (81%), as well as the well-being of the country as a whole (75%), more so than their own needs such as missing key milestones like graduation or prom (67%), or traveling (46%).
- **Concerned rather than carefree:** **Young people feel increasing anxiety** to get back to normal **as major life decisions are being put on hold:** 75% say being in limbo and **facing uncertainty** about the future is causing them a significant amount of stress. 68% are worried about their chances of **finding a job/advancing their career** and 63% are stressed about **falling behind in school**. 85% said they'd be willing to take all their classes online if it meant they could socialize in person sooner.

**Implication:**

Peers are important catalysts: Nine out of ten young Americans (91%) would be more likely to wear a mask to a social gathering if everyone else was too and nearly half (48%) say the reason they don't follow safety precautions is that they forget and 36% say they don't need to because they are healthy. Notably, these numbers are in line with the general population.

Section:

# 04

**Topic:**

## ONLINE LEARNING IS GOING BETTER THAN EXPECTED

**Introduction:**

With the majority of the country's children back to school and millions of America's children fully learning online, new Harris Poll data reveals how e-learning is going, according to parents. And so far, it's not bad.

According to the findings on virtual school:

- **Going better than expected:** When asked how well their child was adapting to online learning, more than three quarters (76%) of parents of the child(ren) in/entering preschool through twelfth grade say their child(ren) is adapting well to online learning. Only 14% said it was not going well with the remaining sample not back in school yet.
- **"It's going to work":** 62% of parents also said, up to this point, conducting school virtually is "going to work" for the remainder of the school year while 38% said this is not going to work for the duration of the school year.
- **Were parents expecting this all along?** In our survey in mid-August, 59% of parents had already predicted their kids would be studying again online instead of 40% expecting they would be in school.
- Meanwhile, students are experiencing a mix of emotions as they balance school and COVID precautions: Nearly one-quarter (23%) **are nervous to be in person given COVID-19** and an equal number (23%) **wish the rest of the school year would be all online**. One-fifth (21%) say they are relieved it went well, while the same number (21%) are already back at home/doing online only due to an outbreak of COVID-19 cases. **Only 16% are not looking forward to the rest of the school year.**

**Implication:**

School in the bedroom is likely going better because a) it's nice outside b) it's only the first week and c) in the buzz of excitement of a new year/seeing friends etc—kids are not complaining yet. But with the looming threat of virus flare-ups on campuses pushing online school out longer into the year, expect tension to build. Game changers are the fast testing we reported on two weeks ago (56% say the new 15-minute Abbott test is trustworthy) as well as the resumption of vaccine trials by AZ, one of three horses at the front of the pack.

Section:

# 05

Topic:

## HOLLYWOOD CONTROVERSIES

Introduction:

With the Emmy Awards this weekend, we checked in with Americans to see if they believe Hollywood is representative of the country and if movies, like sports, are becoming political.

- Last week, the Academy of Motion Picture Arts and Sciences introduced representation standards for the Academy Awards starting in 2024. “The standards are designed to encourage equitable representation on and off-screen in order to better reflect the diversity of the movie-going audience,” [according to their statement](#). [As Axios says](#), “the move is in response to years of criticism that the Academy is too male and too white.”
- **Most Americans (60%) agree with the new requirement**, including more than half (54%) of White Americans and nearly three-fourths (73%) of Black Americans. However, most Americans say the industry was already doing fine before the requirement: more than half (57%) of Americans agree “Hollywood is doing a good enough job on issues of diversity and inclusion”, including 58% of White Americans and 52% of Black Americans.
- #OscarsSoWhite? Despite the trending hashtag from earlier in the year about how Hollywood is out of touch, two-thirds (64%) of Americans agree that generally, they feel people similar to them are being represented in Hollywood movies when it comes to race, gender, sexual orientation, and age. Though over half (54%) of Black Americans agree, White Americans (68%) are in even stronger agreement; and both Men (65%) and Women (62%) similarly agree.
- Most Americans (71%) **agree that “award shows have become too political over the years”**, with a notable partisan divide: 82% of Republicans vs. only 62% of Democrats agree. And the political issues are starting to trend from the award podium to movies themselves: 44% say they have heard something about [the recent Mulan controversy](#), and 43% say if they heard a movie was made in cooperation with the Chinese government they would be less likely to see it.

Implication:

Hollywood, as with the sports world, is looking to exert its influence to address social change in America, even at the risk of alienating audiences. Movie studios will need to navigate the Chinese market and all of its complexities as they look to champion equality and social justice both at home and abroad.



# WAVE 26

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## WAVE 26 INTRODUCTION

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The following research was conducted between **September 3-5, 2020** by The Harris Poll. Fielded among a nationally representative sample of **2,022** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

**Topic:**

## WHO'S BEST TO DISTRIBUTE A COVID-19 VACCINE?

**Introduction:**

As news of a COVID-19 vaccine feels seemingly within reach, the world will soon turn to the daunting next phase: the logistics of distribution.

- When it comes to who is best prepared to distribute the vaccine once it is ready, Americans **are divided in who they trust**: 34% say the states, 30% say the federal government, and just 13% say private companies.
- As with most things in America, **there is a partisan divide on how prepared the country is to deliver a COVID-19 vaccine**. While the country as a whole is split, 47% say the country is prepared and 53% say it is not prepared, nearly two-thirds (64%) of Republicans say we are prepared vs. only 35% of Democrats.
- How critical is a COVID-19 vaccine to returning to normal? Nearly half (47%) of Americans say it will make them comfortable to do certain activities again, such as fly on a plane, go to the gym, or go to large events.
- [The CDC has told states](#) to prepare to distribute a vaccine as early as November, while nine biopharmaceutical companies [signed a pledge](#) vowing any vaccine submitted for approval will be safe and effective in order to provide confidence to consumers.
- However, some worry the vaccine may not be the definitive solution to the pandemic as many are hoping. Why? Because, [as the Economist warns](#), conspiracy theories around vaccinations may prevent it from creating herd immunity. In our polling from August 16, **nearly one-third (31%) of Americans say they won't get the vaccine as soon as it becomes available**.

**Implication:**

The creation of a COVID-19 vaccine will likely not bring an immediate end to the pandemic without a well-executed distribution plan and public confidence in receiving the vaccine. From approval to creating vials to distribution to administering the shot, vaccinating the global population will be an unprecedented logistical challenge.

Section:

# 02

**Topic:**

## **SOME AMERICANS WENT TO MOVIES THIS WEEKEND. MANY DID NOT. HERE'S WHY.**

**Introduction:**

Any other year would have seen Americans flocking to the movie theater to see the summer blockbusters, but in 2020 the pandemic has put a hold on most big releases until consumers are comfortable returning to the theater.

- Over the holiday weekend, Christopher Nolan's new thriller 'Tenet' debuted in theaters after significant delays due to the pandemic and **was a major test for theaters nationwide**. [As CNBC frames it](#), "'Tenet' in pre-covid times would have been expected to tally between \$35 million and \$55 million during its opening weekend, on par with other Nolan films like 'Interstellar' and 'Inception.' The \$20 million is reflective of a 50% cap on attendance at theaters and that only around 65% of cinemas have reopened to the public."
- Being indoors and in close proximity to other viewers is a no go for most Americans during the pandemic: 70% of Americans say **movie theaters are more dangerous than other types of public gatherings right now**, and an equal number (71%) say they **would not feel safe in a movie theater** right now.

- To get attendees into the seats, movie theaters **will need to adopt the 'select all that apply' approach of most businesses**: two thirds of Americans (66%) say social distancing and a limit to the number of people allowed in are among the most important things a movie theater could do during COVID-19, followed by 63% saying thoroughly cleaning theaters, 61% want to see mandatory masks throughout the theater, and 58% say hand sanitizer stations throughout.
- Is the theater half-empty or half-full? Nearly half 47% of Americans say **25% capacity is an appropriate level to operate at**, while 41% say **50% capacity is appropriate**. Only 1 in 10 (12%) say a 75% capacity is appropriate.

**Implication:**

There are certain types of activities - sporting events, concerts, going to the movies - which rely on a crowd as part of the experience and will be among the last to return to what we once considered to be normal. Until then, the movie industry will be looking at half-full theaters, drive-ins, and direct-to-streaming options. What movie theaters will look like post-COVID remains unclear: nearly three-fifths (58%) of Americans are worried they might not survive.

Section:

# 03

Topic:

## IS WORK-FROM-HOME WORKING?

Introduction:

Work-from-home is here to stay, at least until after the pandemic ends. What will the future of remote work look like?

- **Most Americans (70%) are currently working or have the ability to work from home during the pandemic.** Remote life skews younger: three-fourths (74%) of Gen Z/Millennials and 75% of Gen X are able to work from home, while just under three-fifths (58%) of Boomers are able to.
- Americans **strongly support working-from-home during the pandemic:** a majority (86%) say employees should be allowed to work-from-home during the pandemic until they feel comfortable to return (86%). And it's here to stay for the foreseeable future: three-fifths (60%) say it is likely they will **continue to work remotely this fall** and 84% agree if the work is able to be done remotely, employers should not require their employees to return to the office until COVID-19 is no longer a threat.
- **Some Americans have adjusted to remote life:** one-quarter (25%) say their productivity has increased, while just under one-fifth (18%) say their productivity has decreased.
- While many Americans have become fans of remote working, **there is at least one prominent critic:** [Netflix CEO Reed Hastings](#) tells the Wall Street Journal he doesn't "see any positives. Not being able to get together in person, particularly internationally, is a pure negative. I've been super impressed at people's sacrifices."

Implication:

Despite the convenience and security of working-from-home, it will never perfectly replace the benefits of face-to-face interaction among colleagues. After the relative success of the forced work-from-home experiment, businesses will need to adapt to workers' demands.

Section:

# 04

Topic:

## SUMMER'S GONE, BUT STRESS IS NOT

Introduction:

With Labor Day Weekend behind us, summer and the slight mental escape it offers is officially behind us. And with it, Americans see increasing stress as we head into the fall phase of the pandemic.

- With a presidential election and a historic pandemic coinciding, **the future of the country (43%) is causing more stress among Americans** than going back to school (34%), personal finances (29%), the upcoming holidays (28%), physical health (25%), and work (24%).
- **Our stress is causing stress for...our dentist?** [As the New York Times reports](#), “from COVID-induced nightmares to ‘doomsurfing’ to ‘coronaphobia,’ it’s no secret that pandemic-related anxiety is affecting our collective mental health. That stress, in turn, leads to clenching and grinding, which can damage the teeth.”
- As Americans continue to stay home as much as possible, **how are they passing the time to ease the stress and anxiety?** More than three-fifths (63%) are watching more TV; 49% are listening to more music; 42% are spending more time with family; 35% have been working out, and 35% are playing video games.
- But despite the increased stress resulting from the pandemic, American households are experiencing some silver linings: **71% of married individuals say the pandemic has had a positive impact on their marriage**; only 29% say it has been negative. And three-fifths (60%) of those with kids doing virtual schooling say the alternative method had had a positive impact on their household.

Implication:

Pandemic-induced stress is changing everything from our consumer habits to our health and relationships.

Section:

# 05

Topic:

## THE DEATH OF THE OFFICE?

Introduction:

With support of work-from-home here to stay until the pandemic is over and workers feel comfortable to return, will the office ever be the same?

- In a survey [The Harris Poll conducted for Crain's Chicago Business](#), we found less than one-third (31%) of business people in Chicago say there will be no change in the amount of office space they will lease after the COVID-19 pandemic. Nearly half (47%) plan to reduce their office space in some capacity, though only (4%) say they are not planning on keeping any.
- **Office space isn't the only area business people in Chicago are pessimistic about:** 57% say business conditions in the Chicago metro area have deteriorated over the last month. However, feelings are mixed about where the Chicago economy will be in six months: 41% say the economy will be in good condition, while 23% say fair and 37% say it will be in bad condition.
- **But it's not just COVID-related effects holding businesses back:** 26% of business people in Chicago say taxes are the biggest issue holding businesses back in Chicago, while 20% say the economy, 19% say crime, 11% say employment issues, and 10% say the bureaucracy.
- And it's not just Chicago: [The New York Times dives into](#) what will happen to all that Manhattan office space, writing "as they grow accustomed to working from home, many businesses are delaying signing new leases until rents drop and the pandemic passes."

Implication:

From the lunchtime spots to the retail shops in business districts across the nation, workers piling into office space is an economy unto its own. One of the biggest unanswered questions of the pandemic is when workers will start to return en masse and the lingering effect this will have on local economies.



# WAVE 25

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## WAVE 25 INTRODUCTION

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The following research was conducted between **August 21-23, 2020** by The Harris Poll. Fielded among a nationally representative sample of **1,962** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

**Topic:**

## NBA'S FIGHT WITH THREE CRISES AT ONCE

**Introduction:**

In the first week of the NBA playoffs, ratings were down 20% from last season. While this is in part due to declining television viewership in August, our new data signals fan viewership is being driven by how the **NBA is addressing the three-pronged crises, COVID, economy, and social injustice**. Consider how all three forces are intertwined:

- **Over a third of sports fans say they're watching fewer NBA games:** 37% of Americans and 39% of self-described sports fans say that they find themselves watching fewer NBA games these days than they used to.
- **The main reason is politics:** When we asked those who are watching fewer games to pick from a list of reasons why one answer topped all others: 38% of sports fans say it's because that **"the league has become too political."**
- **Other contributing factors:** 28% said the **games are more boring without fans**, 19% **don't like the NBA's relationship with China**, and 16% said they're just watching less TV overall, not just sports.
- **Speaking of China:** When asked, 37% of sports fans said that the NBA should end their **lucrative business relationship with China**, 36% said they thought the relationship should continue, and 27% were unsure.
- **Americans still stand with players speaking out against racial injustice:** Just last week, the [sports world stopped after the Milwaukee Bucks boycotted their playoff games](#) following the police shooting of Jacob Blake in Wisconsin. And as support (65%) grows for Black Lives Matter, 62% of fans support leagues and players **donating money to local organizations promoting social justice**, 56% support **speaking out during interviews**.

- In addition, nearly half (47%) of fans support players putting social justice slogans on jerseys and 45% support players kneeling during the national anthem.
- **Could this be tied to declining ratings? Maybe...** 51% believe companies should provide a public statement regarding black lives matter and racial inequality in America, and clearly, sports leagues are not immune...

**Implication:**

While some industries faced the crises in stages over time, usually health, then economic, and then social injustice, the NBA is faced with the three-pronged crises all at once. And as we've seen in the past with the NFL and Colin Kaepernick, Americans tend to treat sports leagues just like businesses, and today, near equal amounts say they will remember the companies that did the right thing (76%) and the companies that took missteps (72%) in their response to the issues related to the COVID-19 pandemic, economic security of their workforce, or racial injustice. The tricky tightrope here is the support for the players and the bemoaning of NBA's political-leanings to some. Our money has been and is still on the players to set the tone for the league.

Section:

# 02

Topic:

## CALL IT WALTOK? TIKMART?

Introduction:

With Walmart now in the running for the TikTok stakes, perceptions around retail as a buyer of a social platform are enticing.

- Why is Walmart interested in joining Microsoft's bid? E-commerce, obviously. But Walmart has a spotty record in acquisitions like ModCloth, [Shoes.com](#), [Jet.com](#), and Flipkart. Yet this time there is the dual appeal of embedding retail into a monster of daily user swipes, while also creating a digital ad network where a CMO of a large brand manufacturer can think of Walmart as a place to advertise, [reports The Journal's Sarah Nassauer](#).
- Interestingly, nearly a third (34%) would **support Walmart if they were to buy TikTok**, especially men (39% vs. 29% women) and younger Americans (42% Gen Z/Millennials vs. 20% Seniors). And, **there is bipartisan support too**, both Republicans (35%) and Democrats (37%) would support Walmart.
- Meanwhile, China has introduced new rules around the export of certain types of technology, such as AI interfaces and speech recognition forcing **ByteDance to ask for China's approval** before selling off TikTok's U.S. operations to whoever the buyer is.
- **Who is the best fit to buy TikTok? It's a toss-up:** When asked which companies would be among the best fit to buy TikTok, Americans cast a wide and shallow net: Less than a third say Google (29%); about a quarter Microsoft (24%), followed by Snapchat (22%), Apple (22%), Twitter (20%), while less for Amazon (18%), Netflix (16%), and Oracle (6%).
  - But Walmart was a clear outlier: Only (14%) could envision the retailer.
  - Meanwhile, nearly a third (31%) believe none of the above companies would be the best fit to buy TikTok...

- **Could tech save retail?** The majority of Americans (51%) say **it's a good business decision for a retail company to expand into the technology industry**, especially men (58% vs. 44% women) and Gen Z/Millennials (67% vs. 35% of Boomers; 30% of Seniors). What's more, 64% would have a **better opinion of a company expanding into a different sector/industry other than their own**.
- **The power of platform:** Three quarters (74%) of active TikTok users say **they would miss it if it were banned**. This affinity runs deep: **64% of active Tik Tok users oppose Trump's order** to effectively shut down TikTok even though 59% of these users are **concerned China is inappropriately using their personal data**.

Implication:

Retailers take note: While 47% of Americans miss the experience of shopping, they're becoming reliant on digital (31% are relying more on social media product reviews today) and 77% are satisfied with online shopping now for things you used to do in-store. In order to compete in the post-pandemic retail landscape, digital transformation for retailers must keep pace with consumer demand, or in this case, an addictive app where all youth traffic seems centered on currently.

Section:

# 03

Topic:

## STUDENT HEALTH VS. COLLEGE SPORTS

Introduction:

Outbreaks of COVID cases on college campuses have spiked by the thousands in as little as just weeks since students have returned to campuses. The University of North Carolina at Chapel Hill sent most undergraduates home after clusters popped up in campus housing. In the first week of school, the campus health clinic saw the test positivity rate rise to 13.6% from 2.8%.

- **Amid rising cases, new state restrictions emerge:** New York State has established its own threshold for temporarily closing colleges with COVID-19 outbreaks: 100 positive tests over two weeks. [Gov. Andrew Cuomo announced Thursday](#) that if schools hit that number, they must revert to completely remote learning for two weeks after that, at which point the state would further examine the pandemic's status on that campus.
- **But nearly three-quarters of Americans (72%) say schools should have a threshold of positive cases before moving to an online model,** especially Gen Z/Millennials (74% vs. 66% Boomers). 58% believe these thresholds should be set on the percent of the student/staff body with positive cases, 56% number of positive cases, and 30% say it should be based on hospitalization rate.
- **The college drop-off is now a COVID risk assessment exercise for parents:** What was once a bittersweet ritual for parents dropping their kids off at college has transformed into a process defined by risk management, logistics, and trying to navigate ever-changing protocols. Half of the parents of college students moving on campus (52%) have spent time reviewing the **college's COVID-19 policy** and 34% have **contacted school administration for guidance.**

- **Enter the COVID class of helicopter parents:** 40% of parents of college students moving on campus have created a “**quarantine kit**” for their kids, and instead of the awkward but important lecture on practicing safe sex, parents are now **lecturing kids on practicing social distancing** (39%). Even 37% have looked into apartments for rent in case the campus/dorm closes.
- **COVID-19 and College sports debate:** 68% of Americans say colleges or universities that allow sporting events to happen this fall are **jeopardizing the health and safety of their students.** Meanwhile, nearly three quarters (73%) **are concerned about the economic impact on college towns** that rely on crowds coming to town to attend and watch sporting events.
- **Americans are split on the credibility of national championships during COVID:** Given some major college athletic conferences such as the Big 10 and Pac 10 will not be competing in sports this fall season, we asked whether or not Americans think the team that wins a national championship should be viewed the same as during a normal season and 37% said yes and 36% said no, while 27% were not sure. But it appears [everyone is at odds....](#)
- Read more: [The Big Ten's credibility is being torn apart from the inside out, and it only has itself to blame](#)

Implication:

The NCAA is purported to be the advocates for student-athletes, which looks curiously out of step with its allowances of some conferences to play, while students are sent home or left in their dorms. The billion-dollar business that is college football and the revenues that athletic departments rely on to fund other non-revenue generating sports is driving this decision. But the NCAA's ethos seems to be clouded in dollars, not sense.

Section:

# 04

Topic:

## THE RISE OF 'WORKCATIONS'

Introduction:

The travel industry was hit hard by the COVID-19 restrictions, yet Airbnb seems to keep on going with a whole new set of customers. As TWKTD reports, in the last three months, [the platform has seen a threefold increase in reviews mentioning remote work](#).

- We call them 'Workcations': Airbnb data says that **people are renting for longer too, 28 days plus**. With many offices still permitting WFH and in-person classes suspended later into Fall, Airbnb **launched a section dedicated to long term rentals**. They are also seeing a shift in the locations - **most popular locations for people renting homes for 28 days or longer are rural** - places that are a beautiful escape from the city and the pandemic.
- Curious about these leisure-suits, we surveyed Americans currently working remotely/from home this weekend, and **three-quarters (74%) would consider taking a 'workcation'**.
  - Eight in ten (80%) Gen X, (71%) Gen Z/Millennials are interested compared to only (49%) Boomers, who are more likely to be retired or own second homes (or both).
  - Only 17% said they would never take a work-cation.
- **Where would you like to live and work, if you could go anywhere?** The most popular spots are California (19%) and Florida or New York (15%).
- **What would you stay in?** 45% would use a hotel to book a workcation Airbnb (39%). However more younger people say Airbnb (45%) than hotels. VRBO is also popular (20%).
- If office working is languishing, **business conferences are nearly non-existent**. [One meeting in Boston Seeded Tens of Thousands of Infections](#), study finds.

- **Companies are pre-planning for less regular workers already:** This summer, [Ford asked roughly 30,000 employees](#) who work at or near its Dearborn, Mich., headquarters to clear out their desks. It had nothing to do with layoffs, but to prepare for a future in which many, if not most, **employees won't come into the office every day**.
- **Hackers are following workers home:** As employees WFH, companies are facing a [skyrocketing number of hacking attempts](#). There were 320,000 **complaints of internet crime** received by the FBI as of May 28, **nearly double the rate of the prior year**.
- [College Is Everywhere Now](#): students who, deprived of experiences and many back online again **are forming 'college collab' houses in remote locations** that go way off-campus.
- Want the ultimate workcation? See [Why Tourist Spots Like Bermuda Are Offering Remote-Work Visas](#).

Implication:

One of the surest and safest futurist bets you could make is to say that work will be blended between home and the office. But less certain is who, for how long, and in what types of rhythms. For companies, the post-vaccine workplace holds advantages and deficits. The efficiency of home working is offset by the loss of creativity and innovation that interaction brings. Longer-term, other factors are at play such as the potential shift to the suburbs, the impact on cities and their supporting infrastructure for commuters, urban resident tax bases for services, etc. Take your workcation now because this nightmare year might become a one-off (let's hope).

Section:

# 05

**Topic:**

## AMERICA IS BETTING ON ABBOTT FOR THE RETURN TO NORMALCY

**Introduction:**

Just last week Abbott announced FDA approval of its BinaxNOW™ COVID-19 Ag Card rapid test for detection of COVID-19 infection. Selling for only \$5, **this test delivers results in fifteen minutes** and is about the size of a credit card. This week we asked Americans what they think about Abbott's new test:

- The majority (56%) of Americans say **Abbott's rapid COVID-19 test is trustworthy**, and nearly 3 in 5 Americans (59%) **believe Abbott's rapid test would be accurate**. Meanwhile, less than a third (27%) say they wouldn't trust it and less than a quarter (23%) don't believe it would be accurate.
- **Why Abbott interest among the public? Americans want accuracy, simplicity, and speed:** Last week Americans told us when it comes to COVID-19 testing, the top three most important factors were **accuracy (91%), simple process (88%), and fast results (83%)**, which is exactly what Abbot's new BinaxNOW promises.
- **Why speed matters:** In New York, the absence of widely available rapid virus tests has led affluent New Yorkers to turn to services that can yield results in as little as 24 hours. Free standard tests can take days to return results.

- **Instilling confidence to return to public activity:** While three quarters (74%) still fear leaving their house for essential errands, Abbott's rapid test might be the assurance they need to venture out safely... Over half (53%) say they **would somewhat/very comfortable going to the office and staying in a hotel (51%) if they were given a rapid test beforehand**. This assurance extends to the activities deemed most risky like flying on an airplane (42% would be comfortable doing so after taking the Abbott test) and even going back to school (40%), the gym (40%), theme parks (39%), large social gathering (38%), taking public transit (37%) and going to a sporting event or concert (36%).
- **Getting us closer to "normalcy":** 64% of Americans say Abbott rapid test will have a great deal/some **impact on parts of American society returning to normal**, especially men (68% vs. 61% women) and Gen X and Seniors who more likely than Gen Z/Millennials (71% and 68% vs. 58%).
- **Bloomberg** reports "Demand is expected to be high, as they could help guarantee the safety of everything from flights to restaurants to offices."
- Beyond testing, Harris Poll finds a growing risk of 'vaccine protectionism': Two-thirds (66%) of Americans don't want to share a vaccine right away with the rest of the world if the U.S. gets there first, according to our recent survey with Axios.
- But this type of nationalism has inherent risks. **Eli Lilly CEO David Ricks**, whose company has a coronavirus treatment in Phase 3 of clinical trials, told "Axios on HBO" that **it'd be smart to share with other countries rather than going America first**. Once at-risk Americans are vaccinated "I think humanitarian principles would say we should share." Ricks also points out that public health that this is a shared risk, not an individual risk.

**Implication:**

A fifteen-minute test liberates restaurants, gyms, airports, conventions, concerts and many other areas of typical American gathering. But the public will need to maintain vigilance moving into a different type of re-opening and not make the mistakes made in May and June when states went rogue in their back to normal routines. This however is great news in a year not filled with much.



# WAVE 24

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## WAVE 24 INTRODUCTION

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The following research was conducted between **August 14-16, 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:

## AMERICA SAYS THE POST OFFICE DELIVERS

Introduction:

In recent weeks, the administration's effort to reduce costs at the U.S. Postal Service by cutting funding, overtime, and sorting machines has been met with fierce backlash by Americans. Why the backlash? Earlier this summer, USPS [was #1 in the Harris Poll Essential 100](#) during the pandemic, beating out the likes of Amazon, Clorox, and Microsoft.

- Why do Americans consider USPS to be the most essential “company” during the pandemic? Likely because **they don't view it as a company at all, but a public service**. Despite calls by many in the administration to run the organization like a private business, three-quarters of Americans (76%) say **USPS should receive necessary government funding during a crisis** vs. only one-quarter (24%) who say it should be run like a private business and not be subsidized by the government during a crisis.
- Recent operational changes to cut costs are being noticed by Americans: **more than half of Americans (54%) say they have noticed a delay in mail or packages arriving at their home** over the last few weeks. Only 38% of Americans support these changes and over three-fourths (77%) say they are concerned about the delays.
- And while few issues in government cross the partisan divide, the popularity of USPS is one: 54% of Republicans and 69% of Democrats oppose the changes. Perhaps because Americans **nearly unanimously (92%) say USPS plays an important role in their community**.
- The importance of USPS and impact of these changes will increase drastically over the next two months as more and more Americans choose to vote-by-mail during a pandemic. **Three-fifths (59%) of Americans believe USPS can handle a nationwide vote-by-mail election, including 74% of Democrats and 49% of Republicans.**

- This isn't just wishful thinking. Last year, the agency [delivered 28 million packages per day during the holiday season](#).
- **But large majorities are concerned their mail votes won't be counted:** While 67% say they support conducting vote-by-mail for the upcoming election, 74% say they are concerned that recent changes at the Post Office means some Americans' ballots won't be counted.
- A majority of Americans (67%) support vote-by-mail for this November's election, down slightly from 73% in April of this year.
- Americans' love for the Postal Service made an impact: Postmaster General DeJoy announced that these changes [will be suspended until after the November election](#).
- **Read More:** The USPS reaches every address in America every single day, even in rural areas that [require a mule](#) to reach the depths of the Grand Canyon.

Implication:

This assault on USPS credibility is achieving the intended effect of casting doubt on mail-in voting. But what's more telling is the overwhelming trust and vitalness that Americans place in their letter carriers. After all, USPS is a lifeline to seniors as well as many parts of rural America that FedEx and UPS won't or can't reach. These may be challenging times, but the good ol' postal service has delivered in worse weather.

Section:

# 02

**Topic:**

## TIKTOK, TIME'S RUNNING OUT

**Introduction:**

As President Trump upped the pressure last weekend on ByteDance to complete its sale within 90 days to Microsoft (or now Oracle), our The Harris Poll in [USA TODAY](#) finds Americans support the executive order, whereas daily users oppose – despite acknowledging its inherent security risks:

- The majority (57%) of **Americans agree with President Trump's executive order** effectively shutting down TikTok and WeChat (within 45 days) over security concerns. And even more (67%) are concerned China is inappropriately using personal data collected from the popular app.
- However, 64% of active TikTok users oppose Trump's order even though 59% of these users are concerned China is inappropriately using their personal data.
- What's more, nearly two-thirds (62%) of all Americans agree that even if bought by an American company, TikTok would still pose a security threat because of its ties to China – including 63% of active TikTok users.
- TikTok has a hold on its users: Three quarters (74%) of active TikTok users say **they would miss it if it were banned** while only 30% of Americans cared.
- Overall, 61% agree **Trump is doing the right thing** in looking to ban apps that threaten American's online privacy security. But nearly the same amount (58%) also agree what is happening with TikTok **sets a dangerous precedent that the government can interfere in corporate acquisitions** before proper diligence is conducted.
- Why go after TikTok? Votes: Our Harvard CAPS/Harris Poll found in July over half of voters (53%) **now believe China is an enemy of the U.S.** with 7 in 10 believing China is creating tension and instability in the world.

- **Another reason: it's young people on the platform:** Nearly one-third (31%) of Americans told us they have downloaded TikTok but 60% are 18-24; 52% of 25-34. Only 16% of Xer's and Boomers 50-64 are on the platform. Among active users, 50% are 18-24; 43% are 25-34; but only 10% of 50-64.
- Other skirmishes in the new growing China tech war: [U.S. puts new curbs on access by China's Huawei to U.S. technology.](#)
- **Read more:** [Trump now has a profile on Triller](#)—TikTok's rival platform.
- **Read more:** If Microsoft isn't a matchmaker ... is [Netflix](#)?

**Implication:**

It's good politics, but Trump risks an American-Chinese tech divorce that could break the global internet and disrupt companies and consumers in both countries. While this tit-for-tat (or tik-for-tok) is harmful on both sides, American firms that specialize in microchips, AI, biotech and other industries are worried that restricting the flow of technology to China could siphon expertise, research and revenue away from the U.S. and curb America's advantage. Unless security agreements are reached, the world is moving toward two internets with more dislocation for American companies relying on the China market and vice-versa.

Section:

# 03

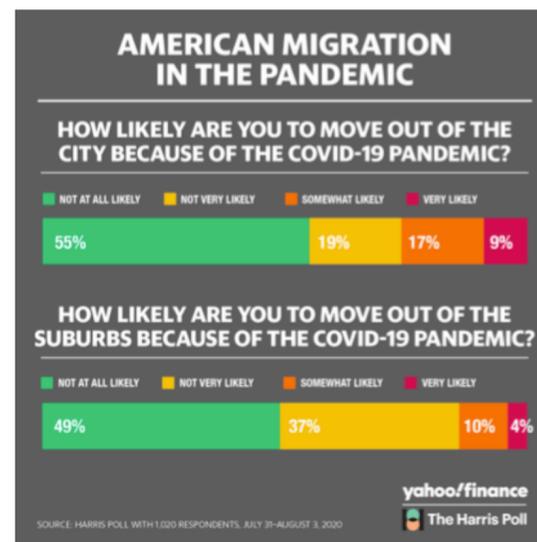
Topic:

## SOFTENING ON THE SUBURBS

Introduction:

The thing about polling is Americans feel strongly one way, until they don't. Such was the case in the spring when we reported an intended mass exodus out of U.S. cities into the greenery of America. But now a new Harris Poll shared with [USA TODAY](#) and [Yahoo! Finance](#) finds a change of heart.

- With restrictions easing in some cities, 74% of **urban residents now say they are likely to stay put** despite the ongoing health crisis while just 26% say they are somewhat or very likely to relocate. This compared to our survey from [May](#), only 60% of urbanites said they wanted to continue living in the city and over three in ten Americans said the COVID-19 pandemic makes them want to live in a rural area more than 21 miles of a major city (37%) or a suburb within 10 miles of a major city (35%).
- Suburbanites are content to stay put, especially women. 86% of suburbanites are not at all/not very likely to move out of the suburbs because of COVID-19, and this number jumps to 90% of women who are unlikely to move from the suburbs.



- That being said, the **younger generation may be more willing to consider the move**, [as USA Today reported](#). 44% of those ages 18-34 are very/somewhat likely to move out of the city due to COVID-19 (vs. 29% of those 35-44, 13% of those 45-54, 9% of those 55-64, and 11% of those 65+). Also, the number of millennials considering moving may vary city by city, [according to the Chicago Tribune](#).

Implication:

The city appeal is back for most urbanites, especially as cities have lifted COVID-19 restrictions. As The Harris Poll's co-CEO, Will Johnson, said, "As the risk of catching COVID-19 subsides, city dwellers are reminded of why they love city living." There are some who will still consider moving, but it is clear that Americans have not yet made up their minds on whether the pandemic will cause them to make a residence move. The housing market will have to wait and see.

Section:

# 04

**Topic:**

## AMID COVID-19, AMERICAN'S DON'T CARE ABOUT CLIMATE CHANGE ANYMORE

**Introduction:**

COVID has shifted the calculus on social issues, causing a mass re-prioritization based on a sense of urgency. In a [survey The Harris Poll conducted last December](#), Americans said Climate Change was the number one issue facing society. When asked in July this year, the environment along with almost every other issue we asked about, took a back seat to COVID. Our Co-[CEO Will Johnson](#) dove into the discouraging results in his [recent Op-Ed in Fortune](#).

- Today, Climate Change comes in second to last on a list of a dozen options, ahead of only overpopulation. Further, more than a third of Gen X men **dismiss climate change as unimportant** and 13% of all respondents say the **government should do nothing to improve the environment**, a stance that rises to nearly one in five of all survey takers in the South.
- Despite the de-prioritization of Climate Change due to COVID, some of Americans' actions may be more environmentally friendly due to the pandemic while others, not so much:
  - **COVID is reducing our fuel burn.** Just 61% of Americans say they are using their car today, compared with the 77% of adults who were driving regularly pre-COVID. And only 14% are flying which is down from 21% last winter.

- But it is also **increasing waste**. Younger men in particular are ordering more takeout food, packed in single-use plastic bags and disposable boxes, often with those plastic straws scorned for littering the landscape and polluting waterways.
- **And it seems our better habits are not here to stay.** Americans say post-COVID they will drive as much as they did before, take public transportation less, bicycle or walk less, buy more clothes, and have more stuff packaged up and shipped to our homes.
- On the flip side, Americans say that they will not use air travel as much even after the pandemic, and that they will go back to reusable bags post-COVID.

**Implication:**

Despite Climate Change taking a significant dip on the list of issues Americans believe most important today, it remains to be seen if COVID could end up harming or helping the environment in the short and long-run. When this question was put to them, nearly 2 in 5 Americans (39%) said that COVID-19 is helping in the short-term but causing long-term damage. With this awareness in mind, we can only hope that the environment will take the front seat again once the pandemic has started to decline.

Section:

# 05

Topic:

## YOUNG AMERICANS TURN TO SOCIALISM IN THE AGE OF COVID

Introduction:

In March of last year, [our survey with Axios](#) found Gen Z/Millennials have a more positive view of the word "socialism" than previous generations, and are more likely to embrace socialistic policies and principles. Last week, we asked [the same question for the Financial Times](#). What did we find? Gen Z/Millennials' preference to live in a socialist country instead of a capitalist country increased by 9 points (from 50% to 59%).

- Why is socialism increasingly appealing to these younger Americans during this crisis? Perhaps because Gen Z/Millennials are significantly more likely to be impacted financially in some way by the pandemic compared to Boomers (92% vs 82%).
  - They are more likely to have cut back on savings (39% vs. 25%), seek out additional sources of income (40% vs. 28%), partially lost income (36% vs. 28%), or accumulated more debt (29% vs. 19%).
- More than three-fifths (63%) of Gen Z/Millennials in our polling say **the pandemic is the most important event of their lifetime** vs. only 40% of Boomers.
- Gen Z and Millennials are also having a **different emotional reaction to the pandemic**: compared to Boomers, they are more likely to feel annoyed (47% vs. 20%), claustrophobic (40% vs. 24%), and overwhelmed (49% vs. 26%) and less likely to be thankful (62% vs. 77%) and appreciative (58% vs. 82%).

- These generations **are experiencing their second global crisis before they even turn 40**. As the [Financial Times](#) wrote last month, "the double blow of the financial crisis and the pandemic will increase pressure for policies to help those under 40."
- But this leftward reaction to the back-to-back crises isn't strictly an American phenomenon. The [LA Times](#) says "the financial crisis shaped the views of millennials in ways that are already driving politics on both sides of the Atlantic, including the greater willingness of younger people to refer to themselves as socialists. Millennials elevated Jeremy Corbyn to the leadership of the Labor Party and Bernie Sanders to the verge of the Democratic presidential nomination. The coronavirus outbreak is likely to sharpen many of these views."
- This November, these two generations are projected to make up 37% of the electorate and what they are looking for in a presidential candidate is shifting the candidates' priorities. According to our polling, the top three voting issues for Gen Z are mass shootings, racial equality, and immigration policy.
- Read more: Vice explores [Why Gen Z Is Turning to Socialism](#).

Implication:

Embracing socialism has implications that extend beyond past politics: It is not just the government that Gen Z is looking to solve problems, it's also corporate America. Half (50%) of Gen Z **say their opinion of a company is influenced by how the company behaves in society**, second only to the quality of products and services (61%).



# WAVE 23

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## WAVE 23 INTRODUCTION

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The following research was conducted between **August 7-9, 2020** by The Harris Poll. Fielded among a nationally representative sample of **1,995** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

**Topic:**

## AMERICA TO CONGRESS: FIX UNEMPLOYMENT BENEFITS

**Introduction:**

Our recent [USA TODAY/Harris Poll survey](#) demonstrates the stark pain that millions of out-of-work Americans are facing over the renewal of Unemployment Insurance. Now that Trump's Executive Order over the weekend promises a \$400 unemployment extension, Americans still say more needs to be done.

- Over eight in ten (82%) Americans believe the expiration of the \$600 unemployment bonus will have an adverse effect on the U.S. economy, and nearly three-fourths (72%) think economic growth will be a lot worse in the months to come. [And economists agree.](#)
- The majority of Americans feel kinship to the more than 25 million out-of-work, fearing they might be next. About half (56%) fear they may lose their job due to the coronavirus outbreak.
- Overall, nearly half (48%) expect **their personal finances to be generally worse off** in the coming months, while 39% say the expiring unemployment benefits will have an impact on their personal finances (45% men vs. 34% women).
- To put this worry into context, American voters in our [Harvard CAPS/Harris Poll](#) found last month that over two-thirds of voters say the economy is weak, which is a stunning four month symmetrical flip in attitudes (61% now say the economy is weak; 39% say it is strong).
- Despite some improvement in unemployment numbers and the [Nasdaq hitting a record high](#), [the New York Times](#) says joblessness remains "alarmingly high."

- We also asked, do you think your income in 2020 will be lower, higher or about the same as it was in 2019? More than one-third (34%) say it will be lower, but (43%) said the same and (23%) said their income would be higher.
- There is a silver lining to these stimulus programs: [consumer credit-card debt is declining.](#)
- Those who are hurting economically tend to skew younger, people of color, and those making under \$50K annually. We asked, as a result of the pandemic have you sought out new/additional sources of income? And 35% of Americans said yes, including 46% of Gen Z/Millennials, 47% of Black Americans, and 43% of Hispanics.

**Implication:**

It's important to understand that **there are two economies in this crisis**. Those who tend to be holding equities and have other sources of revenue coming in are faring better than those who are relying on cash flow from their salaries. But the extent of the Americans who perceive their plight in our data makes us think they are worrying about their own. Leaders take note.

Section:

# 02

Topic:

## REINVENT HEALTHCARE AMID COVID

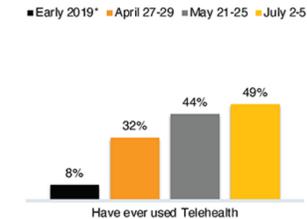
Introduction:

Since the start of the COVID-19 pandemic, we have been actively tracking American sentiment toward their healthcare. In our latest [Curated Conversation](#) with [MDC Partners](#), we dove into findings around **consumer perception of telehealth alternatives** and the **resiliency of these emerging trends**.

- Set against the backdrop of COVID-19, **the future of America is stressing people out**. Our [recent study with the American Psychological Association](#) found that a record 83% of Americans say the future of our nation is a significant source of stress (+17 points since 2019).
- As [The New York Times](#) further analyzed, 46% of parents with children under 18 said their stress level was high, compared with only 28% of adults without children. This resulted in 69% of parents looking forward to a new school year.
- It's not just about COVID-19, but also systemic inequality and injustice. Over half (55%) of Black Americans say **discrimination is significant source of stress** (+13 points from May 2020 to June 2020).
- **Teens are also feeling the pressure, and believe it will last after COVID-19**. Eight in 10 (81%) U.S. Teens say mental health is a significant issue for young Americans according to [research conducted with the National 4-H Council](#). A majority (64%) of U.S. Teens believe that COVID-19 will have a lasting impact on their generation's mental health.

- As stress builds, **employer sponsored healthcare** has taken center stage. According to our most recent wave, **over half (56%) of Americans are afraid to lose their job** as a result of COVID-19. Unless unemployment figures improve significantly, [which looks unlikely](#), many Americans are at risk of losing coverage. Already, according to [Families USA](#), 5.4 million workers have lost access between February and May of 2020.
- What are the ramifications? Two-thirds (66%) of Americans have **postponed or cancelled** healthcare visits due to COVID-19 crisis.
- Where is the glass half-full? 27% of Americans have used **telehealth services for the first time during the pandemic**, with almost half (49%) of Americans having ever used telehealth services.

Have you ever used telehealth services?



**66%** Of Americans have postponed or cancelled healthcare visits due to the COVID-19 crisis<sup>^</sup>

**27%** Of Americans used telehealth services for the first time during the pandemic



- And people are now leveraging telehealth across a wide spectrum of services. **Ongoing management of chronic conditions** has grown 3.5x during the pandemic, compared to 2x for **mental therapy sessions**.
- **Telehealth is here to stay**. A vast majority (91%) believe telehealth services should be **covered by insurance** after the pandemic, with 77% claiming they will **continue to leverage these offerings**.

Implication:

The healthcare system is poised for a “reimagining.” The pandemic has allowed people to see that change is possible. **Over 9 in 10 (91%) agree that the pandemic has revealed the need for everyone to have access to affordable healthcare**, and a vast majority (88%) now feel that the focus of healthcare needs to **shift to preventative care and wellness**. Americans are even willing to give up a certain level of privacy for health and safety.

[Read More](#)

Section:

# 03

Topic:

## HIDDEN HEALTH CONSEQUENCES OF COVID-19

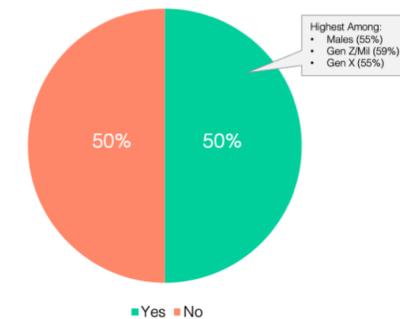
Introduction:

Last week, The Harris Poll [announced an exclusive polling partnership with Fast Company](#) to conduct ongoing surveys to deepen Fast Company's coverage of tech, work life, design, innovation, and the big ideas that are changing the world. In [a recent study we conducted](#) with Fast Company, our team unveiled the risks of **another public health crisis running parallel to the pandemic** fueled by the difficulties of scheduling doctor appointments during COVID-19. Here are some key findings:

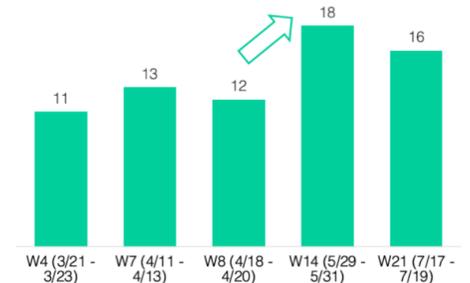
- Nearly a fifth (16%) of parents are claiming their children haven't received all of the recommended vaccinations because COVID-19 has made scheduling inconvenient or impossible.
- Before the outbreak, a majority (64%) of parents claimed their children received all or most of their vaccines on schedule with an additional 17% slightly off schedule.
- In light of these risks, over half (52%) of parents said they would consider **taking their kids out of school if vaccination rates drop significantly** at their kids' school, while only 22% said they'd let them continue attending school.
- In May, the Centers for Disease Control and Prevention [released a study](#) showing that **routine pediatric vaccinations had gone down** after a national state of emergency was declared on March 13.
- **Too freaked out to go:** the number of parents opposing vaccines due to concerns about health risks has increased since COVID-19 began as well. Before the pandemic, it was 7% and now it's up to 9%.

- "It's a potential public health crisis," [Dr. Megan Tschudy, assistant professor of pediatrics at the Johns Hopkins University School of Medicine](#), says of the findings. "It's another layer of unintended consequences of COVID. There are so many levels. People are not taking care of routine things, too. It's a concern many of us have."
- **What about a COVID Vaccine?** Americans are very split on a potential COVID-19 vaccine being successfully developed in the next 6-12 months.

Do you think there is too much "hype" around a potential vaccine in the next 6-12 months?



How long do you think it will take for us to find a vaccine/cure for the coronavirus? (Mean in Months)



Implication:

Although pediatricians are working to make their offices feel safe for parents by doing more frequent deep cleans, scheduling healthy patients and sick patients at different times of the day, and more, parents still seem hesitant to leave the house. With so many questions around the return to school and vaccinations, it will be interesting to see what the Fall will bring.

Section:

# 04

**Topic:**

## BIG TECH: THRIVING OR SURVIVING?

**Introduction:**

Last week, we dove into the divide in sentiment around different tech companies and began to look at the effect COVID has had in the industry. Despite the scrutiny, [Big Tech continues to thrive](#) amidst the pandemic **with a combined \$28.6 billion in profits** in Q2. And we found that **Big Tech may be experiencing a PR boost among younger people**, according to our latest survey conducted with [Fast Company](#).

- Nearly half (43%) of 18-34 year-olds said their **perception of tech giants improved** due to news about the antitrust hearing and 63% said that their usage of the companies' products and services increased. This quite a jump from what the rest of the overall population reported [last week](#).
- **The country is divided on whether big tech companies should be broken up**: 41% believe the government should break up some or all of these firms. However, the majority of Americans are either unsure (30%) or think the government should not break-up Big Tech (29%).
- However, **Americans are still extremely uncomfortable with their business models'** reliance on user data. Though nearly all Americans (86%) use services like [Amazon.com](#) and Instagram, and three-quarters (75%) access them daily, only 9% feel that it is "completely worth it" to allow sale of their personal demographic and preferences to marketers.
- Not only are business models in question, but **also brands' equity**. [Ad Age recently featured an Op-Ed from our Co-CEO Will Johnson](#) that highlights how the Facebook boycott's power lies less in its financial might than its PR profile.
- [The New York Times](#) crunches the numbers and finds "it may have caused more damage to the company's reputation than to its bottom line."

- **Americans are in favor of companies that punish for hate speech**: 47% of Americans said they would have a more positive view of brands that suspend their social media advertising because of hate speech.
- Over a quarter of Americans (27%) said they would be **more likely to buy products from companies that have stopped advertising on social media** in order to protest hate speech; in contrast, 23% said they would be less likely to do so.

**Implication:**

Big Tech has never been more in the hot seat. Almost all aspects of the companies are in question, from business models to their brands, yet we still see them continue to thrive. We've seen consistently that Americans will trade convenience and simplicity for criticism that leads to the type of change some lawmakers seek. Watch public opinion to see how America governs on this issue – especially young Americans.

[Read More](#)

Section:

# 05

Topic:

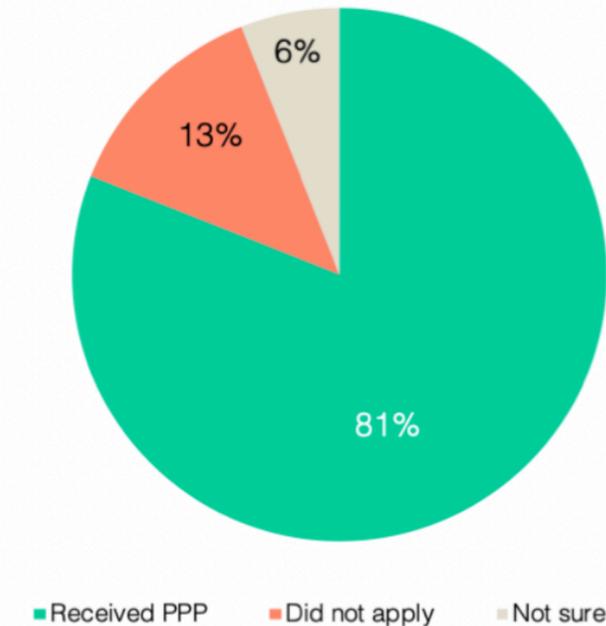
## SMALL AGENCIES BOUNCE BACK

Introduction:

Our small agency partners have been especially hard hit by the economic fallout as corporations slash their marketing and advertising budgets. In order to better understand the effects and recovery efforts, our Co-CEO [Will Johnson](#) surveyed small agency leaders and presented his findings at the [Ad Age Small Agency Conference & Awards](#) last week. Here are some highlights:

- Unsurprisingly, most (54%) are **struggling to meet pre-COVID sales targets**. However, nearly a fifth (19%) of small agencies claim to have hustled and are therefore ahead of pre-COVID targets.
- Though Diversity & Inclusion initiatives are a top concern for leaders, there is a mismatch in results and efforts. While 58% strongly feel their hiring practices and policies promote diversity in the workplace, **only 17% of agencies strongly feel they are diverse**.
- A common theme among all companies is a focus on retention and **many have been able to avoid layoffs**: 8 in 10 (81%) of small agencies surveyed received a PPP grant, and a large majority (77%) have been able to avoid any layoffs and/or furloughs.

Did you apply for a Paycheck Protection Program (PPP) grant?



- For the 23% of agencies that did conduct layoffs and/or furloughs, they estimated both figures at an average of 19.5% and 3.25%, respectively. **Most (57%) are actually recruiting, in comparison to 36% of agencies on a hiring freeze.**

Implication:

As go small businesses, go small agency partners. Given that [small businesses are the backbone of America](#), small agencies join that community. But they must move past cost cutting to find new inventive ways to serve their clients and differentiate their offerings. Now is the time to stand out.

[Read More](#)

Section:

# 06

Topic:

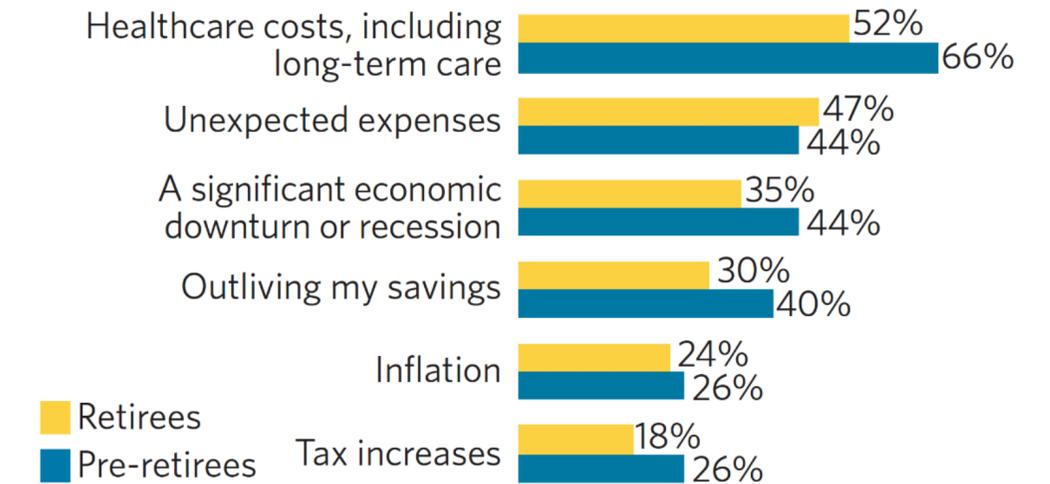
## THE COVID GENERATION GAP

Introduction:

Over the past 23 waves, we have seen the ramifications of the pandemic reach far and wide into unexpected parts of our lives. In our most recent [Edward Jones and Age Wave study](#), we dug deeper into how COVID has accentuated the stark contrast of the financial pressures that face the old generation versus the young.

- **Retirees are half as likely to worry about financial security.** [As reported by CNBC](#), roughly one-third of Millennials (32%) and Gen Z (31%) say that COVID-19 has had an extreme or very negative impact on their financial security (nearly twice as likely to say this than their parents).
- Roughly [68 million Americans are changing their retirement plans](#): nearly **3 in 10 (29%) will retire later than planned due to COVID-19**, in comparison to 10% who claim they will retire earlier.
- **Generational generosity**: One-fourth of all parents with adult children, approximately 24 million Americans, have provided financial support to adult children due to COVID-19, and a large majority (71%) of retirees said they would offer financial support to their family **even if it could jeopardize their own financial future**.
- **A gap in financial concerns**: the younger generations are much more concerned with healthcare & long-term care costs (66%), whereas those who have already retired report their biggest financial worries in retirement focus around unexpected expenses (47%).

### Greatest financial worries in retirement



Base: U.S. retirees and pre-retirees (planning to retire in next ten years)

- **But will the younger generations be able to retire?** Roughly 20 million Americans stopped making retirement savings contributions during COVID-19, and only a quarter were on track with their retirement savings pre-COVID.
- **Look on the bright side**: 67% of Americans said the pandemic has brought their families closer together, despite financial hardships due to COVID.
- And, a vast majority (84%) of those working with a financial advisor said this relationship gave them a much greater sense of comfort regarding their finances during the pandemic.

### Implication:

Retirement is yet another aspect of American life that is drastically changing due to COVID-19. The only similar feeling among the older generation and the younger is uncertainty, uncertainty about what the future will bring. For the young, fear of another recession and long term healthcare costs are the most pressing issues, as a result of a pandemic occurring in the earlier years of their life. Whereas for the old, the uncertainty that has come about as a result of COVID has them feeling concerned about the unexpected expenses that are yet to come.

[Read More](#)



# WAVE 22

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## WAVE 22 INTRODUCTION

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The following research was conducted between **July 31 - August 1, 2020** by The Harris Poll. Fielded among a nationally representative sample of **1,992** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

Topic:

## RISKY BUSINESS

Introduction:

Look, we get it. People are sick of life interrupted. Almost three-quarters (74%) of Americans miss gathering with friends and family, and 70% miss dining in bars and restaurants. And this is true especially of young people. On Monday, NJ Governor Phil Murphy-D [rolled back indoor events from \(100\) to \(25\) people](#) which left us asking who is indoors with one-hundred people? People are very concerned, so why aren't our lawmakers?

- Americans are growing more wary of gatherings. Over the past weekend, 82% of Americans are fearful of leaving the house (up 5 pts from July 19), while 69% **are not willing to attend a large public event** given the current outbreak of COVID-19.
- **Anything big and indoors is verboten:** 58% say they won't go to the movies for at least another six months, the same as sporting events (49%), gyms (59%), hotels (55%), public transportation (54%), and airplanes (46%). And 13% say there are no actions that will make them comfortable to do certain activities, so it's a lot of Netflix.
- **Older Americans are taking the pandemic more seriously:** Adults 65+ (83%) think the amount of fear is sensible given how serious the pandemic has become vs. 73% of the nation or 68% of Gen Z/Millennials.
- And **seniors are more fearful of the virus spreading when we return to normal public activity:** 80% of 65+ are very/somewhat concerned about possible COVID-19 exposure when returning to normal activity vs. 68% Gen Z/Millennials.
- **But younger people are nearly twice as likely to say people are overreacting:** 32% of 18-34 year olds say the amount of fear around COVID-19 is irrational and people are overreacting vs. only 17% of adults 65+.
- **Alas, a nation gets COVID-woke:** Less than four weeks ago, under one-third (31%) of Americans said the resurgence of cases was driven by **people in their state who lack concern for the pandemic** and 29% said there was **no incentive for people to follow state recommended safety protocols** as they were not enforced requirements.

- But now, 84% of **Americans support social distancing and wearing face masks**. And mask wearing rose 14 pts from March 28 to June 15 (54% to 68%) which was attributed to those who were indifferent to masks: 33% said 'neither positive or negative' on March 28, which has decreased to 19% on June 15.
- **But the generational blame game is starting in earnest:** Older people blaming younger people: On May 17th we found that more than three quarters of adults 50+ (77%) **said younger Americans are being ignorant by thinking they are less likely to spread COVID-19 than others** and 72% say they are acting reckless and putting the rest of the nation's health at risk. At the same time, more than half of younger Americans ages 18-49 (56%) say the over-fifties crowd are stubbornly sticking to their routines even though they are more at risk.

Implication:

This slow pulling off of the nation's band-aid is having devastating health and economic consequences. The lack of a Federal plan for battling COVID is obvious, but also is a growing clamor for the nation's young people to live up to their purported 'we' values of climate change, universal income, and gender/racial equality. Why isn't COVID equality one of these generational values, Boomers and seniors ask?

Section:

# 02

Topic:

## PLAY BALL?

### Introduction:

Just days into Major League Baseball's 2020 season, [the Florida Marlins reported at least 20 reported positive cases of COVID-19](#) between players and coaches, including 18 total players testing positive that has caused multiple games to be postponed. And the St. Louis Cardinals front office fended off reports that [their 13 players were infected because of a casino visit](#). Americans say the national pastime is looking more like one hot mess. And they are waiting for the other cleat to fall:

- Despite [strong viewership ratings](#) over opening week, **a majority of Americans (58%) say the MLB should not continue playing games** due to COVID-19. There's even a partisan divide: 56% of Republicans say they should continue to play vs. only one-third (33%) of Democrats.
- **Pessimism Abounds:** Regardless of their personal opinion, 58% of Americans do not believe MLB will be able to finish their season. While Commissioner Rob Manfred says he's "[not a quitter](#)", he warned union leader Tony Clark during a Friday call that if the league and players don't do a better job of following COVID-19 protocols and managing the virus, Manfred could shut down the shortened season, [ESPN reported](#).
- Americans think circumstances will force MLB to stop anyway. First, there is **high awareness of positive COVID tests**: 78% of Americans say they've heard about MLB players testing positive for COVID-19.
- And despite expanded DH across both leagues this year and pumped-in crowd noise, 48% of **Americans say watching baseball is much more/somewhat more boring** than before C-19 (maybe because [those fake baseball fans are creeping people out](#)), with Boomers (64%) finding it more boring than Millennials (42%). That doesn't factor in the number of Americans who thought baseball was a snooze before COVID-19.
- [FiveThirtyEight](#) looks at what it would mean if records are set during an abbreviated season.

### Implication:

The outlook for MLB does not portend well for other non-bubble sports and shows how hard it is to control the virus even under a semi-controlled, protected environment.

Section:

# 03

Topic:

## CRIME AND RACIAL JUSTICE

Introduction:

One of the more interesting stats in last week's [Harvard CAPS/Harris Poll](#) was how the nation interprets social justice through the lens of personal safety and perceived threat. In it, an overwhelming majority of Americans support The Black Lives Matter protests; however, 72% don't believe the police should be defunded. And 77% are concerned about the level of crime in America's cities, of which 42% blame the protests/protesters.

- As of this past weekend, **76% of Americans say crime is on the rise in America**. This perception exists across racial groups, with 77% of White Americans and 72% of Black Americans, and 81% of Hispanic Americans.
- **A majority (55%) think crime is rising in their city specifically**. Urbanites (66%) are most likely to say crime is on the rise in their neighborhood while fewer suburbanites (50%) and rural Americans (49%) say crime is rising where they live.
- **Instead of Defund, reinforce: Two-thirds say the same or more police are needed nationwide**. Half (50%) of all Americans say the country needs more police officers. while 34% say we should keep the number about the same. Just 16% say fewer officers are needed.
- Among racial groups, 53% of White Americans say more officers are needed compared to 37% of Black Americans say we need more police. Around a fifth (21%) of Black Americans say we need less police while 43% of this same group say the number of police officers should stay the same as we have now.
- **Urbanites want more police in their communities**. Perhaps in response to where the most pronounced protests have been, 46% of those in urban communities want more police in their city, compared to 37% of suburbanites and 42% of Americans in rural communities. These numbers all split toward Republicans wanting more police, not less.

Implication:

The Harvard CAPS/Harris Poll also found that an overwhelming majority equate protests to riots, so the concept of defunding the police is unnerving. 85% say the looters and rioters should be prosecuted, yet 51% say that inner-city prosecutors are not pursuing them to justice. BLM has three-quarters of Americans supporting it, but the narrative that protests equals rioting is dog whistle to some Americans (e.g. Portland Federal Forces) that could derail the promise of racial justice.

Section:

# 04

Topic:

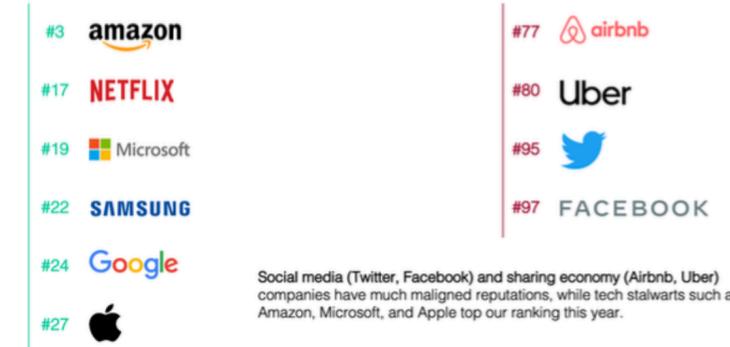
## BIG TECH DIVIDES IN TWO

Introduction:

The Harris Poll looked at [last week's tech hearing](#) with the CEOs of Amazon, Apple, Facebook, and Google and wondered whether the hearing had any impact on the public's view of the tech industry. [In our Axios Harris Poll](#), **corporate reputation soared during the pandemic**, even for tech, which saw its reputation as an industry rise. Does the public feel differently after seeing the CEOs up close?

- While certain members of congress have become more tech-literate question askers, Americans were left unmoved if much had changed:
  - The majority of Americans (52%) said after last week's hearing their view of the tech industry is neither more positive nor negative.
  - The House Antitrust subcommittee did land some punches however, particularly against first-time visitor Jeff Bezos and his treatment of third party sellers on its platform. There were 28% who say after last week's hearing they have a more negative view of the big tech companies and only 20% say after last week's hearing they have a more positive view of the big tech companies.
- But we're finding **it's no longer big tech, but good vs. bad tech**. Americans have already begun to parse tech companies on the basis of usefulness, allyship, and intentions. Tech is dividing sharply in our Axios Harris Poll study.

2020 AXIOS HARRIS POLL 100  
A Tale of Two Techs



- Tech hardware, digital-led delivery, communications and entertainment diverge sharply from social networks and a few platforms like Airbnb and Uber who have been hit hard by COVID. Our survey also found that media—especially social media – is untrusted by over two-thirds of Americans and is in the bottom two of respected industries in addressing the pandemic eclipsing only airlines. Facebook and Twitter rank at the very bottom for Trust (#97 and #96, respectively), while Airbnb and Uber don't do much better (#80 and #81).
- A further dissection of the rankings show where tech is dividing along moral and ethical lines: Netflix (#16 for Ethics), Apple (#18), Samsung (#21), and Microsoft (#23). And despite their otherwise sterling reputations, Amazon (#3 overall but #24 Ethics) and Google (#24 overall but #41 Ethics) have an ethics deficit.
- **Companies That Enabled Digital Home Acceleration:** #13 Hulu, #17 Netflix, #31 Peloton, #28 Zoom, #42 DoorDash, #44 Instacart, #53 Grubhub all delivered value to American households while sheltering in place.
- The Economist [cover story this week](#) explores how Google sees itself as it approaches middle age and tries to avoid becoming a “conventional company.”

Implication:

Monopolistic market power, suppressing competition, destroying anonymity on the internet, acting as a platform and advantaged competitor are but some of the anti-trust attacks levied on the FAANG four. (Netflix was spared). But as WIRED points out, the real crime here is consumer indifference: “What we don't want is for a company to get so big, to crush or absorb the competition so thoroughly, that it can stop caring as much about what the customer wants without jeopardizing its profits.” According to our data, the social media networks are the first ones on the consumer's firing lines.

Section:

# 05

**Topic:**

## HERE'S WHY BLACK WOMEN DESERVE MORE CREDIT

**Introduction:**

Americans paid their respects to a great American, John Lewis last week for his legacy of social justice. And in revisiting the history of the social justice movement, we are slowly learning that that telling is wildly incomplete as it often overlooks the achievements of black women who paved the way; a systemic issue of knowledge and learning that Americans want to change.

- From civil rights, suffrage, Stonewall to #MeToo, black women have stood on the front lines of fighting for justice [throughout history](#) but haven't gotten their dues, as recently discussed on [The Daily Show with Trevor Noah](#). And the majority of Americans agree: 60% do not think black women have received the credit they deserve for their role in the racial equality movement and more than 2 in 5 Americans 43% say they **never/rarely hear about the achievements of black women** in the movement.
- **The majority of Americans have never heard of the black women who founded Black Lives Matter:** 73% have never heard of **Patrisse Cullors** and **Opal Tometi** and 65% have never heard of **Alicia Garza**. Worse, **less than a fifth (18%) are aware that the Black Lives Matter Movement was founded by black women.**
- We see the same lack of awareness within the #metoo movement, 66% have never heard of Tarana Burke, as well as **Stonewall**; 67% have never heard of Marsha P. Johnson; 67% Sylvia Rivera.

- **The exclusion of Black women puts them at risk for greater harm:** A [recent study from the American Psychological Association](#) found that Black women, who live at the intersection of racism and sexism, may be harmed when their unique experiences as Black women are not recognized. Our survey found that 53% of Americans incorrectly think that **black women's experience of police brutality receives the same amount of media attention as black men's experience**. Yet activists created the [#SayHerName campaign for this very reason](#): black women victims of police brutality often receive far less coverage than their male counterparts.
- Stewart Coles, lead researcher of the study says "**This 'intersectional invisibility'** means that movements that are supposed to help Black women may be contributing to their marginalization."

**Implication:**

76% of black people feel this moment in the racial equality movement "feels different" than it has in the past and over half (54%) attribute that to the fact that **people outside the black community** are finally trying to listen and understand the plight of black people. But in order to achieve racial equality, history must be told equally, too.

[Read More](#)



# WAVE 21

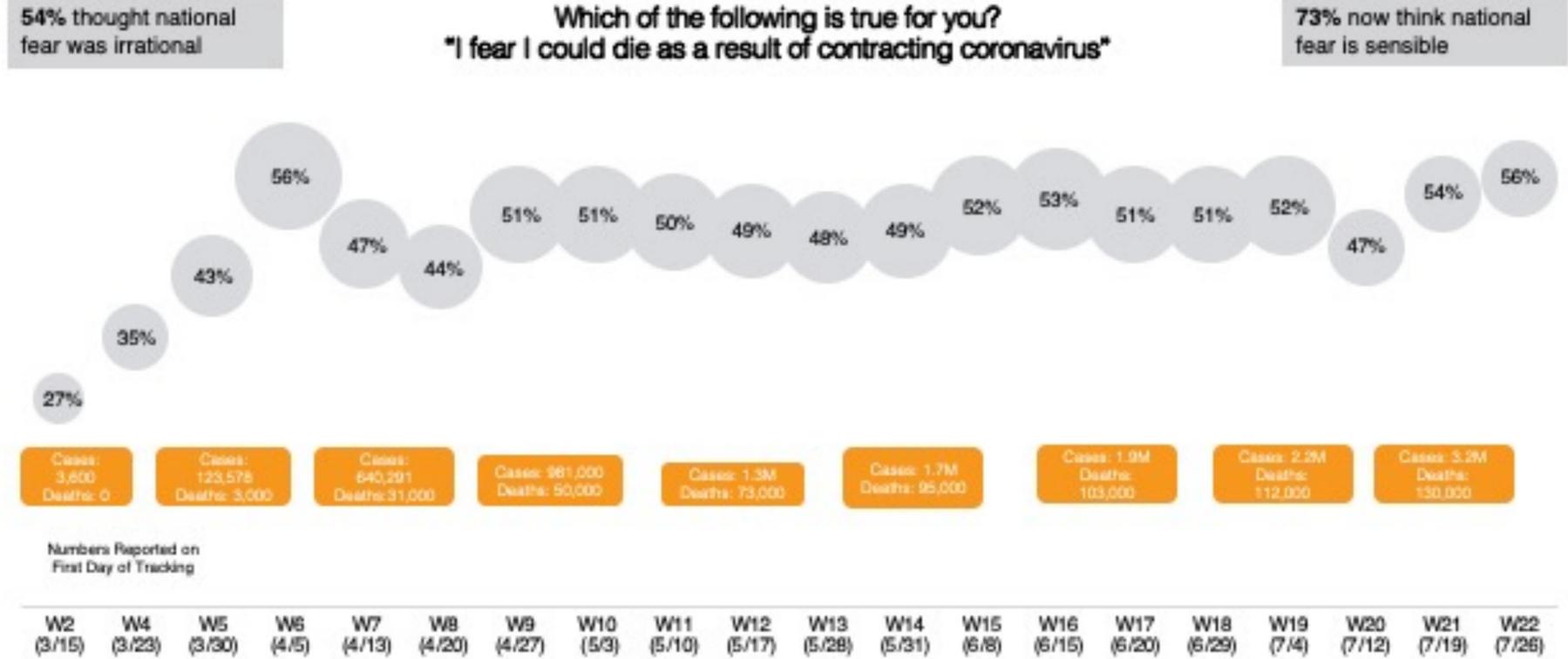
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## WAVE 21 INTRODUCTION

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The following research was conducted between **July 24-26, 2020** by The Harris Poll. Fielded among a nationally representative sample of **1,998** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

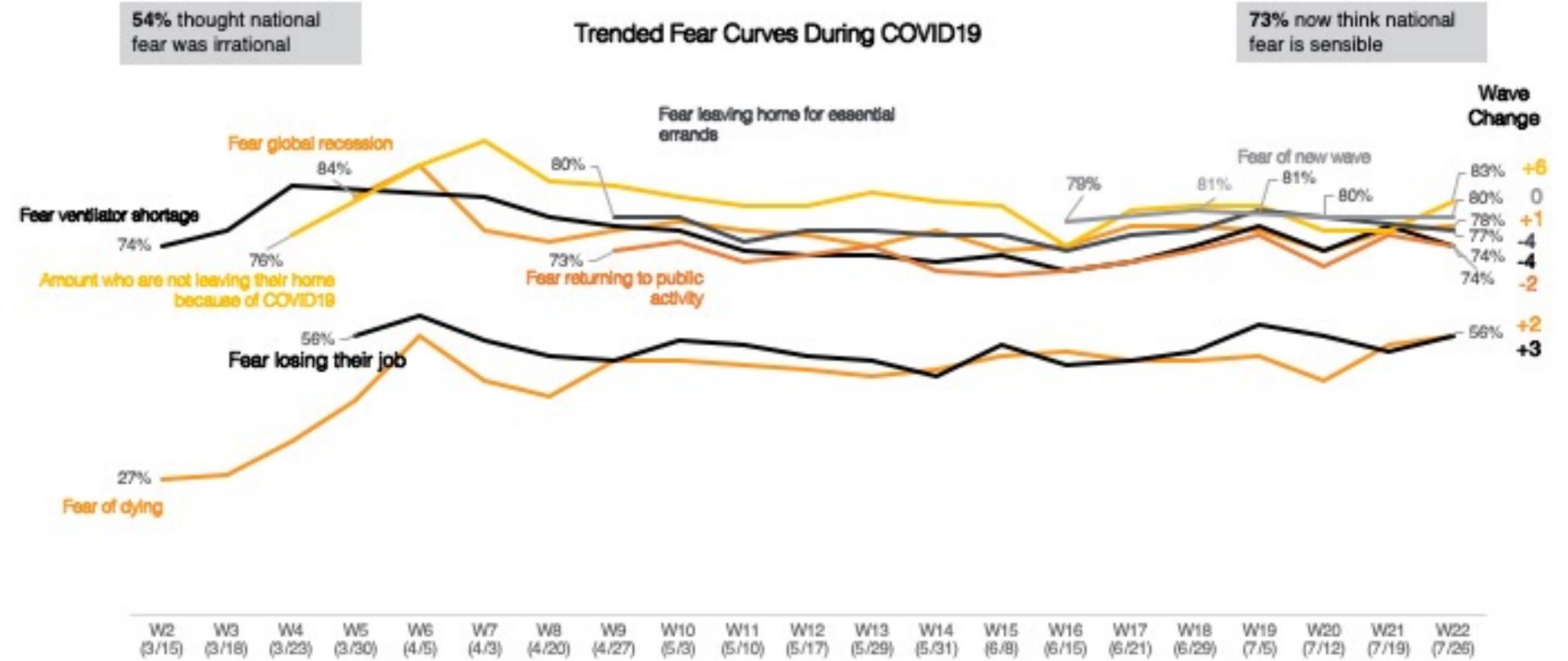
# American Fear Remains Ever-Present Even as States Reopen



Source: Harris Poll COVID19 Tracker Wave 15  
 BASE: GENERAL PUBLIC W2 (2020); W3 (2020); W4 (2020); W5 (2020); W6 (1993); W7 (2013); W8 (2020); W9 (2020); W10 (2020); W11 (2020); W12 (1981); W13 (1998); W14 (1985); W15 (1989); W16 (1983); W17 (1982); W18 (3151); W19 (1957); W20 (1974); W21 (1970); W22 (1986)  
 Q18 Which of the following is true for you? I fear I could die as a result of contracting coronavirus/ I do not fear that I could die as a result of contracting coronavirus

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

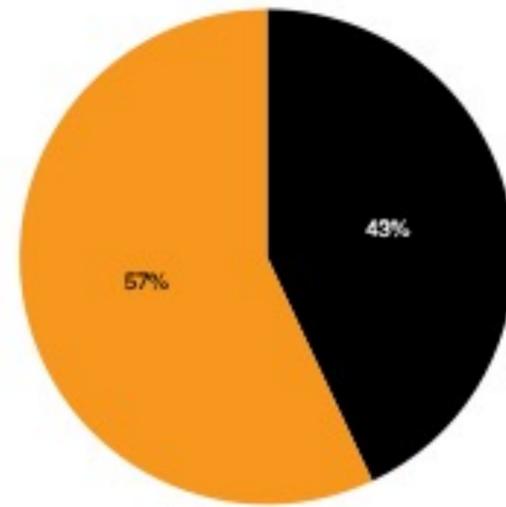
# The Task for Communicators: Lifting the Curtain of Fear



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

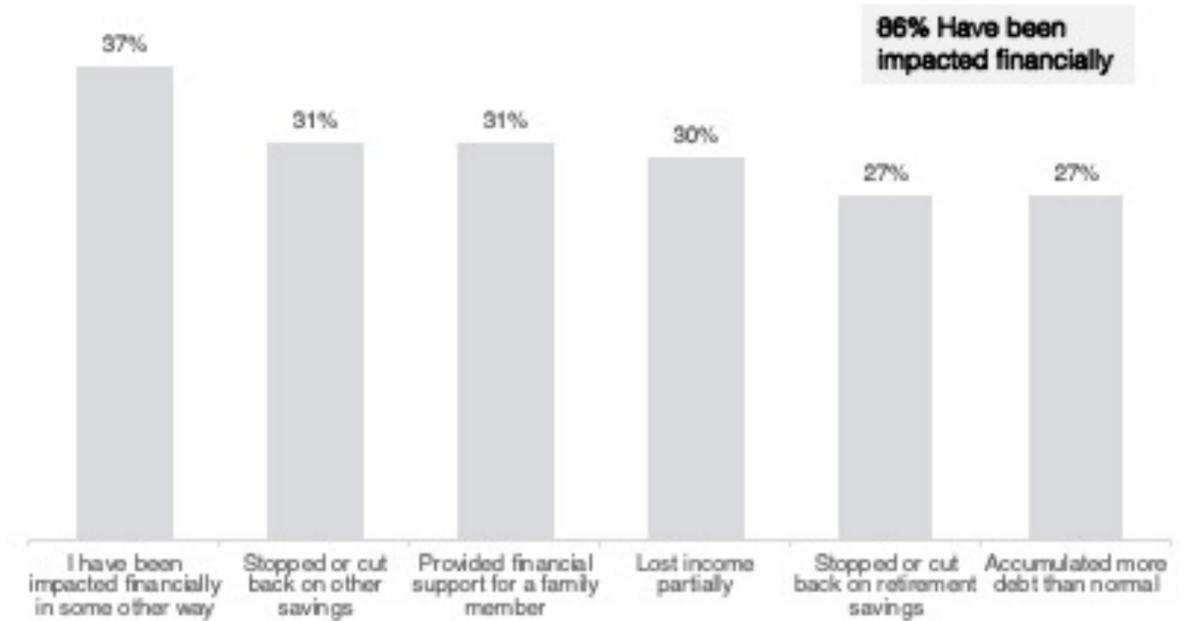
# Americans Say Economic Impact Will Have a Bigger Effect Personally Than the Virus Itself

Which do you think will have a bigger effect on you and your family?



■ Coronavirus/COVID-19 itself  
■ The economic impacts of the coronavirus pandemic

As a result of the current pandemic, have you or your household been impacted financially in any of the following ways?



Source: Harris Poll COVID19 Tracker Wave 22  
BASE: GENERAL PUBLIC W22 (1,988)

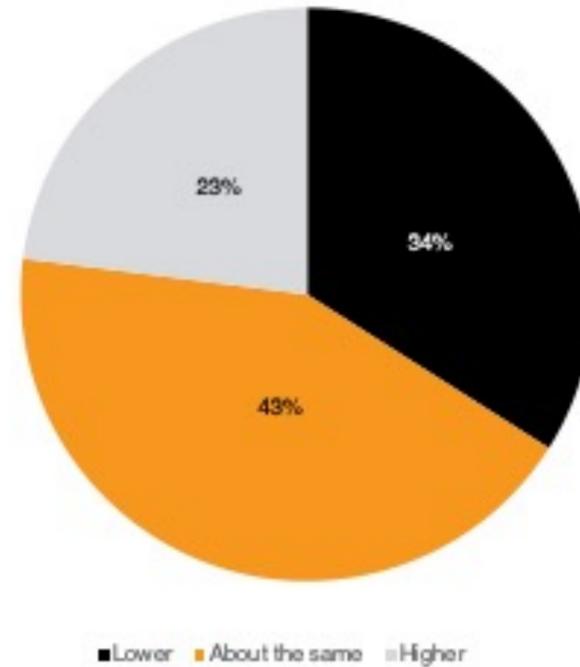
L101 Which do you think will have a bigger effect on the life of you and your family?

EMP05 As a result of the current pandemic, have you or your household been impacted financially in any of the following ways?

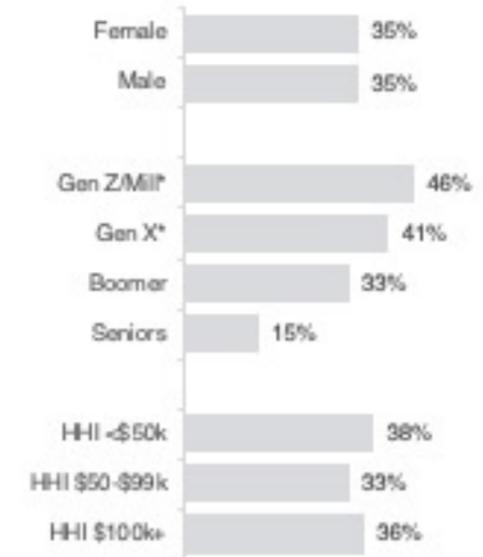
THE HARRIS POLL:  
COVID-19 IN THE U.S.

# Over a Third Expect Lower Income in 2020 and Are Seeking New Sources of Income

Do you think your income in 2020 will be lower, higher or about the same as it was in 2019?



35% have sought out new/additional sources of income



\*Statistically Significant Difference

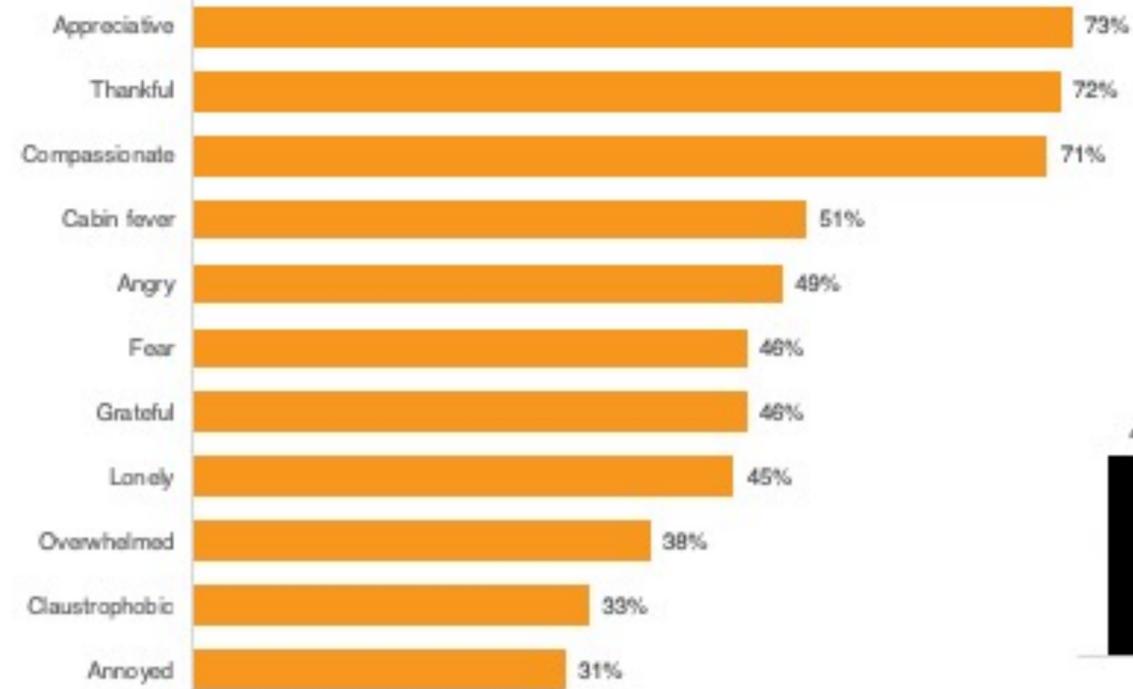
Source: Harris Poll COVID19 Tracker Wave 22

[PAGE: GENERAL PUBLIC WORKING](#)

Q9 Do you think your income in 2020 will be lower, higher or about the same as it was in 2019?

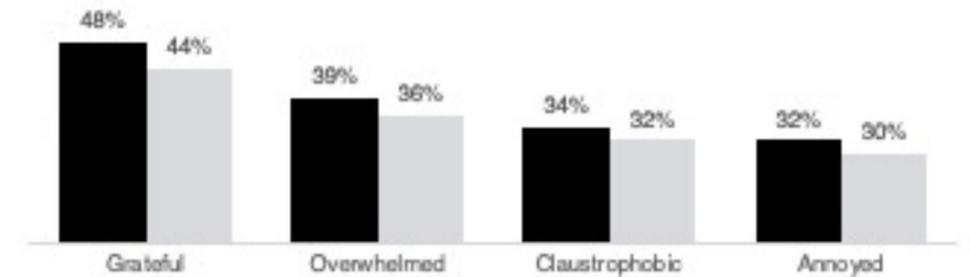
# America's Mix of Emotions\* During the Pandemic

Have you felt any of the following during the pandemic?



\* Especially Parents!

■ Parents ■ Non-Parents



Source: Harris Poll COVID19 Tracker Wave 22  
[BASE: GENERAL POP 18-72 11000](#)  
FR01\_1 Have you felt any of the following during the pandemic?

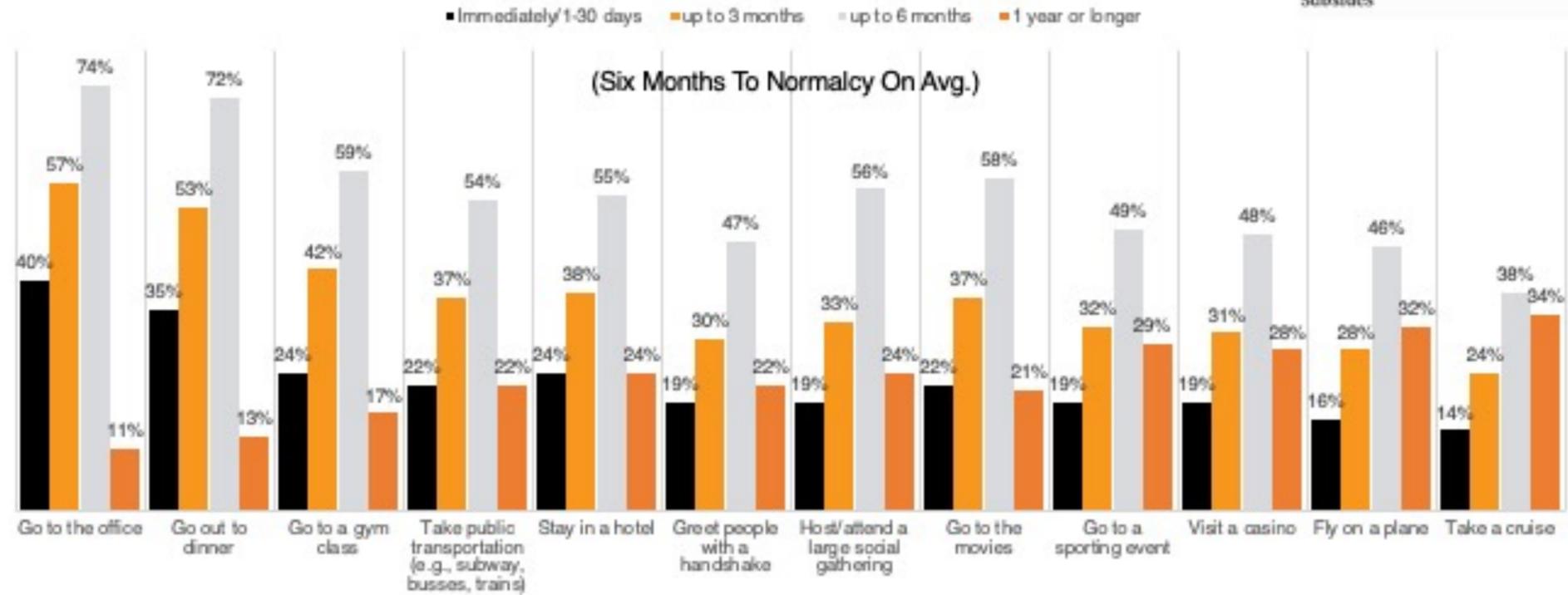
THE HARRIS POLL:  
COVID-19 IN THE U.S.

# Consumer Confidence Correlates with Distance and Familiarity

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

**Forbes**

Poll: Two-Thirds Of Americans Won't Travel For At Least Three Months After COVID-19 Subsides



Source: Harris Poll COVID19 Tracker Wave 22

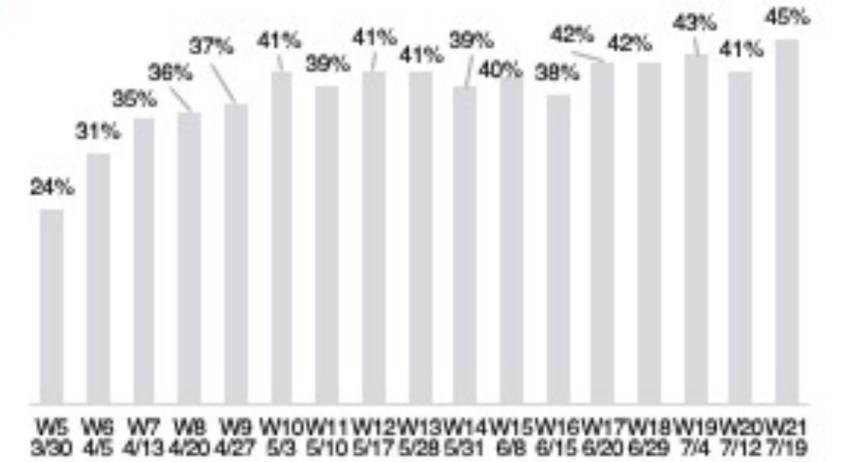
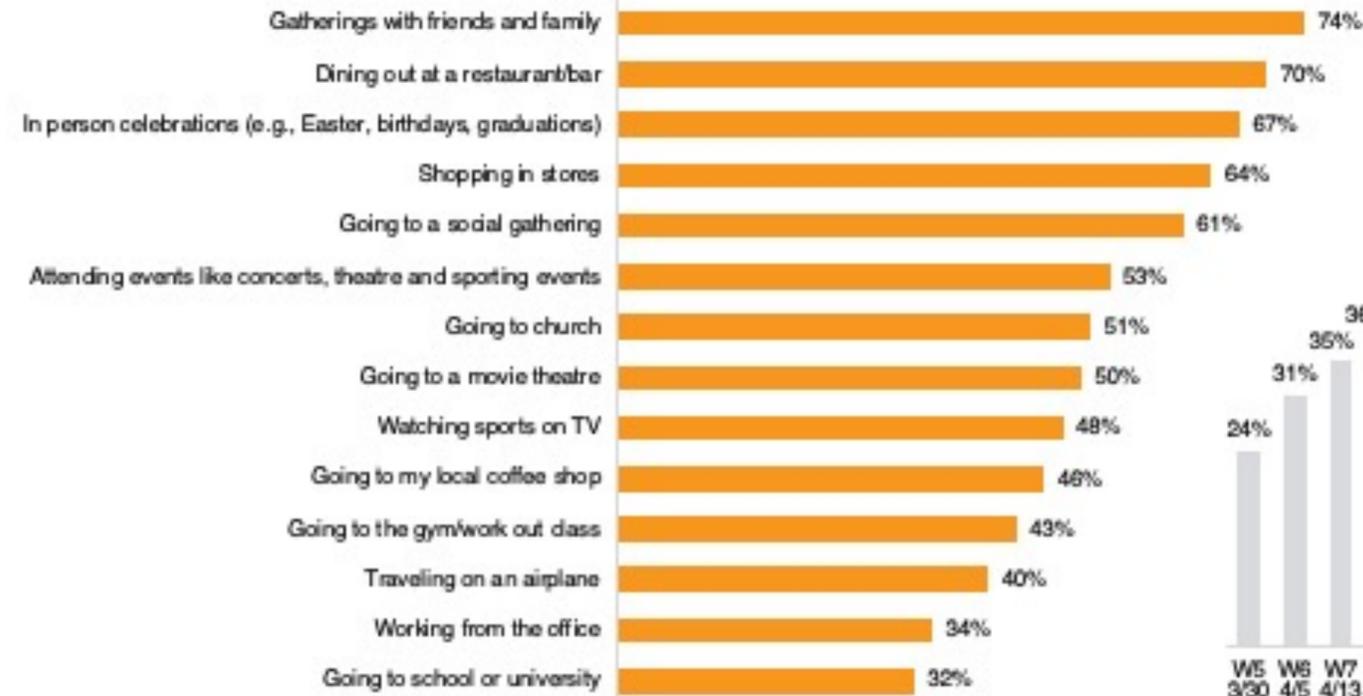
BASE: GENERAL PUBLIC W22 (1388)

Q33B Once the government provides information that the spread of the virus is flattening how long will it take you to do each of the following?

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

# However, Americans Want Their Life Back – 4 in 10 Miss Traveling on an Airplane

How much would you say you miss each of the following during this time of virus-related shutdowns?  
% A lot/Somewhat



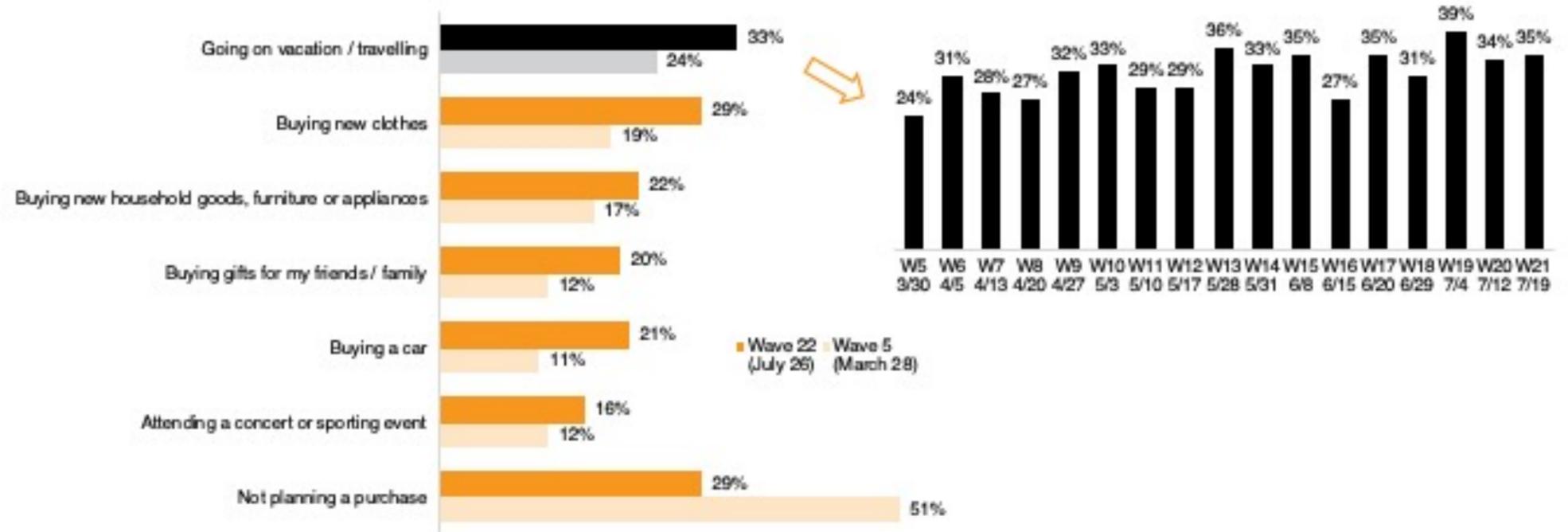
Source: Harris Poll COVID19 Tracker Wave 22

BASE: GENERAL PUBLIC W22 (1988)

FR05 How much would you say you miss each of the following during this time of virus-related shutdowns?

# And Pent-Up Demand is Building Across Categories ('Revenge Spending')

Major Purchases Planned Once Things Return To Normal



Source: Harris Poll COVID19 Tracker Wave 22

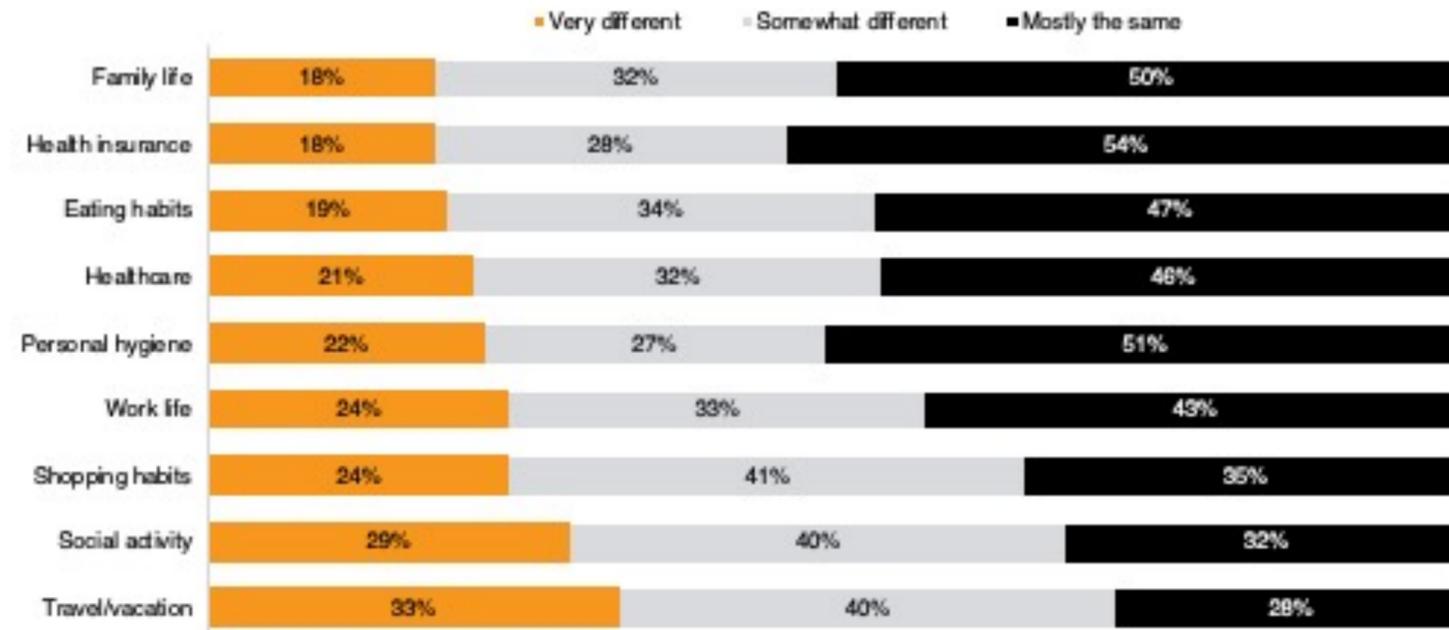
BASE: GENERAL PUBLIC W22 (n=1888)

REV01: Are you planning any major purchases once things return to normal and businesses re-open? Please select all that apply.

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

# Moving Forward, Americans See Their Lives Changing in Fundamental Ways

Once the pandemic is over and things return to normal, what do you think will be very different, somewhat different or mostly the same?

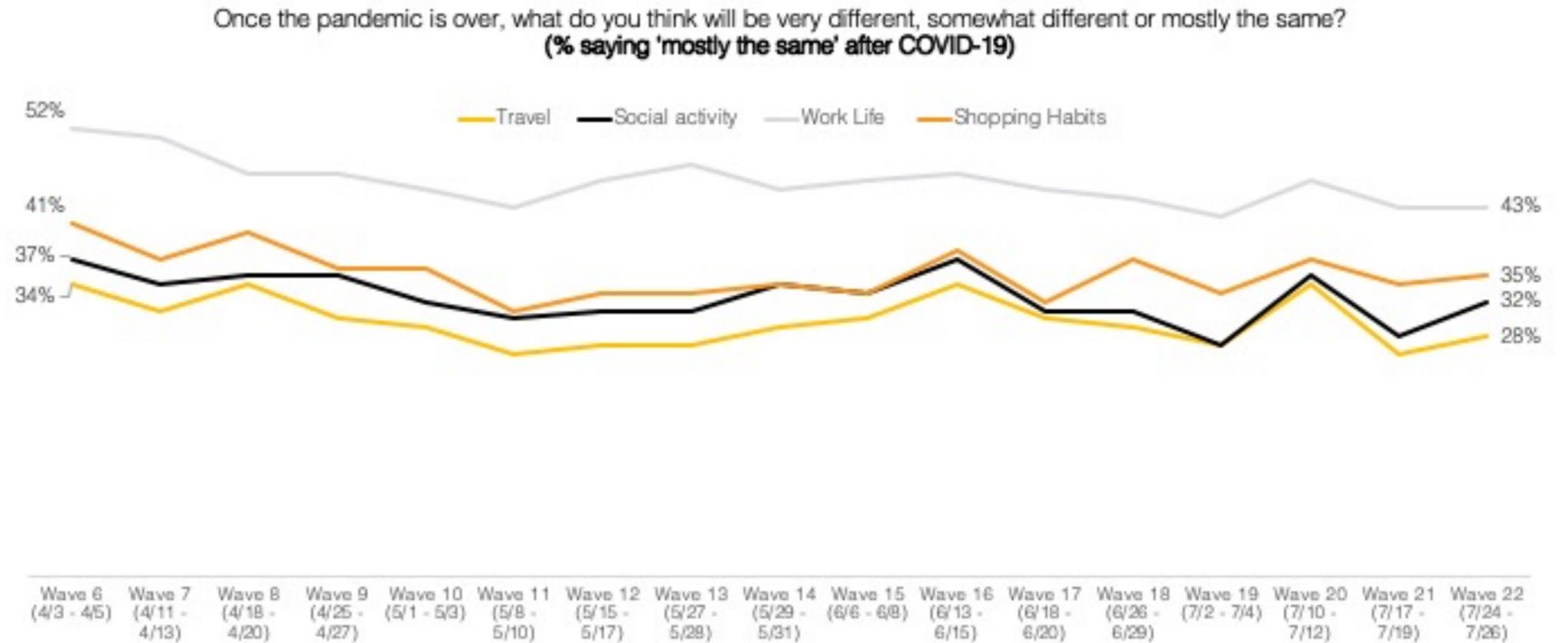


Source: Harris Poll COVID19 Tracker Wave 22  
BASE: GENERAL PUBLIC W22 (1958)

L102: Once the pandemic is over and things return to normal, do you think each of the following areas of your life will be very different, somewhat different or mostly the same?

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

But Returning  
To Life As it Was  
Before Feels  
Less and Less  
Realistic;  
COVID-19 is  
Changing  
'Normal' As We  
Know it





# WAVE 20

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## WAVE 20 INTRODUCTION

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The following research was conducted between **July 17-19, 2020** by The Harris Poll. Fielded among a nationally representative sample of **1,970** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

Topic:

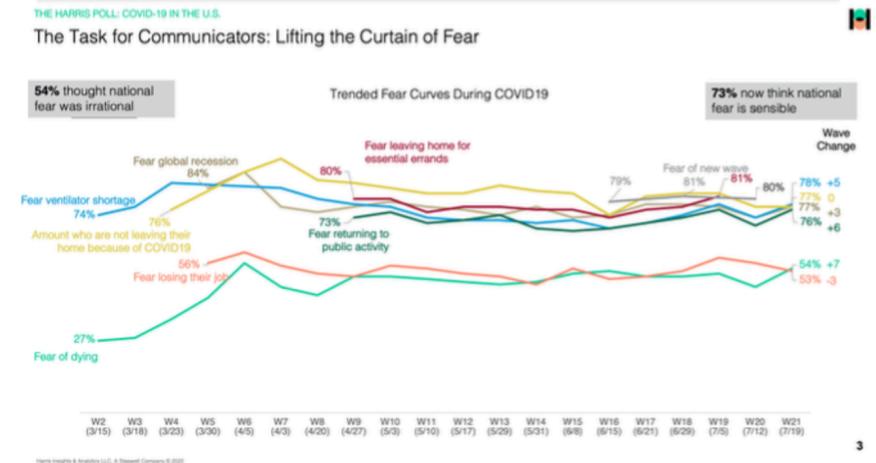
## SPRING AHEAD OR FALL BEHIND? AMERICANS PONDER WHAT AUTUMN LOOKS LIKE

Introduction:

From work to school to sports, more people than not think we're in for a long slog. We asked Americans to look ahead and their crystal ball is cloudy to say the least:

- **Nearly half of Americans (48%) think COVID-19 cases will not go down until six months or longer.** Seniors are more likely than Gen Z/Millennials (54% vs. 44%) to believe this. Another quarter (26%) think cases will decline three months from now.
- **A small sliver of optimistic Americans (11%) think COVID-19 'will magically disappear' within the next couple of weeks.** These *hopesters* are younger and more urban: Gen Z/Millennials are more likely than Boomers (14% each vs. 7%); Urban more likely than Suburban and Rural (16% vs. 8% and 9%).
- **A nation confused on where we are in the journey to overcome COVID-19:** While some think the country is in the middle of dealing with COVID-19, an equal amount think we're just getting started; more than 2 in 5 Americans (42%) think the country is in the middle of dealing with the COVID-19 pandemic but a near equal amount (43%) say it's just the beginning (21%) and the greatest is still ahead (22%).

- **As such, mask wearing and social distancing seems to be going mainstream:** Three quarters (75%) of Americans say they are more likely now to wear a mask and socially distance than last month. **Wearing masks in public has risen fourteen percentage points** since late March and this shift is attributed to those who were indifferent to masks before (33% said 'neither positive nor negative' on March 28, which has decreased to 19% on June 15).
- And as of last week, **more than three-quarters of Americans (77%) support states enacting mandatory 14-day quarantines** for out-of-state travelers from states with a high resurgence of COVID-19.
- Testing is another matter, however. **More than half of Americans (55%) have not been tested and don't think they should.**



- Nerding out on a cure? Check out the [WHO's draft landscape of COVID-19 candidate vaccines](#).
- [Our April survey with the WSJ](#) showed heavy intention for streaming services leading to what we said then would be a content supply chain problem. Today, Axios reports [Coronavirus dooms fall TV season](#).

Implication:

Americans went from sheltering to revenge spending to penance all within the span of about two months. Clearly states opened too early, Americans say, and now they anticipate another lock down. The good news is we're being more Dr. Fauci than Dr. Trump in our attitudes toward public health. We at The Harris Poll are now working with the CDC on guidance for youth socializing for the remainder of the year. A big challenge once the politics of masks, schools and lockdowns are handled. The kids are not alright.

Section:

# 02

Topic:

## AMERICANS THINK ANOTHER LOCKDOWN IS COMING, BUT WHO SHOULD BE IN CHARGE?

Introduction:

America has had the longest and hardest journey so far with COVID-19 and many attribute it to the confusion on who to listen to and who is responsible for enacting and enforcing safety mandates... this week we asked Americans who they think should be calling the shots:

- **The nation is bracing for another lockdown:** With rising cases, more than half of Americans (56%) think there will be another **lockdown in their state**. And despite the fact we have yet to experience an official national lockdown, more than 2 in 5 (43%) think there will be a **national lockdown**. Around a third (32%) think there will be one in their community.
- **Americans say governors should call the shots:** Nearly 3 in 5 Americans (58%) say it is **the governor's responsibility to enforce lockdowns over the Federal Government** (42%). And more, 75% think **their governor should issue another lockdown if the federal government does not**, which is highest among Democrats vs. more likely than Republicans (86% vs. 63%) and Gen Z/Millennials vs. Seniors (83% vs. 68%).

- **Americans are getting fed up, 58% say poor state leadership, and resistance to masks** are the main reason behind surge: 34% say governors in those states with increases in cases didn't learn from states hit with the virus earlier than them and should enact best policies to combat it, and 24% of Americans say residents in those states with increases in cases resisted wearing masks.
- **Americans are willing to follow restrictions if it means a shorter lockdown:** A strong majority (86%) would be likely to socially distance and wear a mask in public in exchange for ending a lockdown within a month. Seniors are more likely than Gen Z/Millennials, Gen X and Boomers (96% vs. 77%, 87% and 89%) and (94% vs. 78%, 85% and 88%).
- Read more: [2020 election mail-in voting raises questions about cost, hassle of stamps](#)
- Read more: [Google bans ads on coronavirus conspiracy theory content](#)

Implication:

This is the time for local leadership to shine. Two weeks ago, 59% of Americans said they support their state's approach to re-opening and 80% thought the lockdowns were effective. Today, the majority are still looking to state leaders to lead the fight. Facing an uncertain future, Americans are clamoring for stability and direction and looking to state leaders for hope.

Section:

# 03

Topic:

## SPORTS RETURN IN AMERICA. BUT FOR HOW LONG?

Introduction:

Major League Baseball returns this week, but all is not well in the tea leaves for Fall sports.

- **Americans don't believe there will be a complete season for either NBA or MLB:** Around 7 in 10 American (71%) do not believe the NBA will play a complete season. After months of back and forth, MLB begins a shortened 60 game season on Thursday. Yet more than half of Americans (55%) do not believe MLB will complete their season.
- **Many expect sweeping changes to MLB:** Nearly 3 in 10 (29%) say a shortened season even further, 24% expect the season cancelled completely before it is complete and more than a fifth (22%) expect shortened postseason.
- **Americans don't think any cities will allow baseball fans in stadiums:** Two thirds of Americans (66%) do not think any cities will allow baseball fans in stadiums before the season is complete.
- More than three quarters of Americans (76%) **say it is unlikely that we will have a college football season**, and women are more likely than men (82% vs. 69%).
- **Also, Americans oppose NBA players being able to replace their jersey names with social justice, social cause or charity messages and believe it is a PR stunt:** Around half (51%) oppose NBA players being able to replace their names and more than half (56%) believe they are just doing it for PR.
- Read more: [N.F.L. Players Say #WeWantToPlay but Question Training Camp Safety](#)

Implication:

This year just take the motto of kindergartners everywhere: "You get what you get – and you don't get upset." Sports will be weird and wild. We may see instant closures as we did in March for the NBA and NHL. Or we may see star players out with COVID like an ankle sprain. College Football will be especially daunting with student athletes, multiple conferences and no possibility of 'bubbles' like NBA's Disney World. And with no fans in seats, piped in noise and Vegas betting will be thrown out the window. But with no sports other than horse racing and some obscure footie and F1, America is ready to take whatever the defense will give us. Let's play ball...

Section:

# 04

Topic:

## I'M MOVING OUT

Introduction:

This timeless Billy Joel song – speaking of, did you see [the video of Billy playing this abandoned piano last week!](#) – might apply new data on **the great American migration**:

- On March 27th our data found that nearly 3 in 10 Americans (27%) said the COVID-19 crisis has caused them to **consider moving to a less densely populated area** of the country. Those in urban and suburban areas were more likely than rural (39% and 23% vs. 17%).
- On May 10th our data found nearly 2 in 5 Americans (37%) said the COVID-19 **pandemic makes them want to live in a rural area** more than 21 miles of a major city, including 28% of those currently living in Urban setting and 25% of those currently living in Suburban setting.
- Now a clearer picture emerges as [New Data Sheds Light on Who Is Moving Because of the Pandemic](#). Our friends at The Pew Research Center found that 3% of Americans said they had changed their residence because of coronavirus and 6% said someone else had moved into their home. Overall, more than one in five (22%) had either moved because of the pandemic or knew someone who did, and 9% of those 18-29 said they moved because of the outbreak. Of those who moved because of the pandemic, 28% said the biggest reason was to reduce their risk of infection.
- Read more: [Airbnb Was Like a Family, Until the Layoffs Started](#)

Implication:

These numbers show surprising divergence from stated to actual behaviors thus far. Also, home remodeling (aka fortress reinforcements) is shooting through the roof in our surveys. But with eight in ten Americans anticipating a second wave of the novel coronavirus, could the lure of open space really knock off cities? We posit a different view, one that's bad for commercial real estate but might make cities an affordable beacon to young people who are less fearful of C-19 anyway. Is a creative renaissance in urban America coming in the form of Gen Z? Watch the numbers...



# WAVE 19

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## WAVE 19 INTRODUCTION

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The following research was conducted between **July 10-12, 2020** by The Harris Poll. Fielded among a nationally representative sample of **1,974** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

Topic:

## AMERICA IS FAILING THE TEST

Introduction:

John M. Barry, author of 'The Great Influenza' [quipped recently](#) when you mix science and politics, you get politics. He cites that "Italy, once the poster child of coronavirus devastation and with a population twice that of Texas, has recently averaged about 200 new cases a day when Texas has had over 9,000. Germany, with a population four times that of Florida, has had fewer than 400 new cases a day. On Sunday, Florida reported over 15,300, the highest single-day total of any state". Clearly we're going in the wrong direction and in new polling here's why:

- The countries that have flattened their curves did so through shutdown until achieving a steep downward slope in cases; they were in widespread compliance with public health advice; and third, created a workforce of at least 100,000 to test, trace and isolate cases. But without any national plan, our caseload is rising in thirty-five states. And perhaps our biggest challenge is in testing:
- **More than half of Americans (55%) have not been tested and don't think they should.** In our polling, this startling stat is actually a decrease of 10% since April 20th, when two-thirds said thanks but no thanks to the nasal swab. Interestingly, Boomers and Seniors (who are more at risk) are more likely than Gen Z/Millennials and Gen X (60% and 68% vs. 47% and 51%) and Republicans are more likely than Democrats (61% vs. 51%). A real head scratcher: more than half of Americans (54%) living in the hardest hit states say no to testing in AZ, CA, FL and TX.
- Meanwhile, **a fifth (21%) have not been tested but think they should**, especially Gen Z/Millennials vs. Seniors (26% vs. 16%) and Urbanites vs. those living in suburban and rural regions (28% vs. 20% and 14%). But making the decision to get tested is complicated and nuanced based on the test-seeker's situation, making [The Case for Smarter Coronavirus Testing](#), as reported on by The New York Times.

- Despite the rising concern around the surge in cases, most Americans (85%) say they **have not been tested for coronavirus in the past two weeks**, especially women (92% vs. 77%) and Seniors vs. Gen Z/Millennials, Gen X and Boomers (95% vs. 81%, 77% and 88%)
- **Yet Americans who have been tested said it's fast, convenient and accessible.** Nearly seven in ten Americans who have been tested for coronavirus (69%) say the process of getting tested was easy; nearly half (49%) say administering the test took no time at all and 48% say they received their results quickly.
- **Wait it out? Many Americans have confidence that there will be a vaccine by early Spring 2021:** more than three in five Americans (62%) are confident of this; Men are more likely (68% vs. 56%), as are Seniors, than Gen Z/Millennials (70% vs. 59%). Interestingly, both Republicans and Democrats are more likely than Independents (69% and 63% vs. 53%) to feel optimistic.
- **Finally, American concern for a new wave of COVID-19 is still high:** four in five Americans (80%) are concerned about a new wave of COVID-19 outbreak in their area. Democrats are more likely than Republicans and Independents (91% vs. 69% and 77%). Americans living in an urban setting are more likely than those in rural to be concerned (85% vs. 69%).

Implication:

Most Americans say they won't or don't need to be tested. But most Americans who have been tested say it's fast, easy and painless. So it's very hard to reconcile the perception with the reality – especially when those same people who say no are also overwhelmingly frightened of another wave (spoiler alert: we're still in our first wave). This reticence, ignorance, resistance – whatever you want to call it – needs to be overcome by consistent and clear public health guidance and national leadership.

Section:

# 02

**Topic:**

## HEY, YOUR BELIEFS ARE STRESSING YOU OUT!

**Introduction:**

Nearly 3 in 5 Americans (58%) say they are more stressed out now compared to their normal stress level pre-COVID-19 (which will likely surprise no one). But taking a deeper dive into what is driving our national stress right now reveals that the age old saying 'you are what you eat' couldn't be more relevant. Polarizing content with extreme beliefs are rife amid the COVID culture wars. This week we look at how stress is being compounded by the type of content we consume and the modern ideologies we are organizing ourselves into whether we know it or not.

- **Those who watch polarizing media are more stressed out than normal:** more than seven in ten Americans (72%) who frequently consume news from Breitbart and Fox are more stressed out than normal, as well as 68% who frequent social media websites like Facebook for news. Meanwhile, more than half (54%) of those who never consume news on Facebook are actually less stressed and 48% are less stressed than those who never tune into Breitbart and Fox.
- **New ideologies on mitigation efforts are breathing life into COVID culture wars:** Nearly half (47%) who oppose mandatory masks are extremely/somewhat more stressed out than normal and 51% of those in opposition to taking down monuments and statues are more stressed out than normal.
- **Stuck in our own echo chambers:** 37% of Americans consume content from others who share their values and opinions very often vs. those with values they oppose (24%).

- **Exploring the other side of the aisle is a road less traveled:** Only 25% say they often consume content from others who have different values than their own. And 41% feel confused when they read content from people whose beliefs and values they disagree with, while a quarter (26%) feel frustrated and angry.
- There is work to be done on the inside too, **the way out requires some inward reflection (and turning off Netflix):** Only 11% are coping with their stress by going to therapy, meanwhile nearly two thirds are tuning out and watching TV (64%).

**Implication:**

Living life on the extreme is a vicious cycle; extreme beliefs begets polarization. Balancing the scales requires constructive investigation into the idea of extremism. But thankfully more Americans say they feel empathetic and accepting (31%) when they read content from others with different beliefs than their own vs. those who feel compelled to change others' minds to their own (21%). We are living in an "us versus them" culture while expecting outcomes that can only come from a "we" society.

Section:

# 03

Topic:

## CONSUMERS: CORPORATE MASK POLICIES A MUST

Introduction:

As cases rise, mask-wearing is becoming less political and more sensible. In our data, just released with [Business Insider](#), more than three quarters support mandatory facial coverings. But how to stop the temper tantrums in aisle 4? Americans say, kick it to the boardrooms. Starbucks got this started with a uniform policy on masks and Americans think it's a good idea and will support those who demand facial coverings.

- **Majorities favor mandatory masks:** 77% of Americans favor a mandatory face mask policy, with no major differences between men and women, young or old, or even between racial groups. But slightly fewer Republicans (64%) and Rural-dwelling Americans (66%) said they support a mandatory face mask policy.
- Three-quarters (76%) say they **believe businesses should “enact and enforce” their own mandatory mask policies**; even more (78%) of those living in the hardest hit states (AZ, CA, FL, TX). An equal number said **retail workers should be responsible for enforcing those policies**, including 83% of the hardest hit states.
- Of course, that's not so easy to do if you're bagging the groceries and not armed with a taser. Enforcement has been unfair and challenging to front line workers but 87% of Americans said they **would follow a retail worker's order to wear a mask** including 90% in the hardest hit states.
- Not surprisingly, seniors are more supportive of business mandated mask policies (82%) than Gen Z/Millennials (66%), as are higher income households (80% \$110K+ vs. 72% <\$50k) and Democrats (83% vs. 73% republicans and 69% IND).

- Another incentive: **Majority of Americans (80%) say they are more likely to do business with a company** who require customers and employees to wear a face mask.
- **Wearing masks in public has become more popular since March.** The percentage of Americans who have a positive reaction to people wearing face masks in public has risen 14 percentage points since March 28 to June 15 (54% to 68%). The shift is attributed to those who were indifferent to masks: (33% said 'neither positive nor negative' on March 28, which has decreased to 19% on June 15).
- **There is still a small fraction of anti-maskers** who view masks in public as **negative and have remained unchanged** at (13%) since March. Nothing's likely going to change their minds.
- Others are avoiding mask-wearing by getting in the car: **The Bank Drive-Through Makes a COVID Comeback.** After banks closed lobbies, [their drive-up lanes lined up with customers who prefer tellers over ATMs](#), the WSJ reports: "Calls to service drive-through equipment jumped 42% in April and May compared with the average of the previous 12 months. Cylinder sales (for pneumatic tubes) are up 300% over the same period. Axios says, **“Drive-Thrus are having a renaissance** as customers seek out options that let them avoid doing business indoors”.

Implication:

The majority of Americans are on board with masks. And these are the very same people who want them on everyone when they go into grocery stores, big box retailers and coffee shops. But it's unfair that mask policing is left to employees. Business can't essentially leave this to 'the governors'. The message to business: be a leader and consumers will comply and support you with their business. In this economy, it seems like a no-brainer.

[Read More](#)

Section:

# 04

Topic:

## OPINION: IF FACEBOOK DOESN'T MOVE FAST, IT MAY BREAK ITS MOST VALUABLE ASSET — ITS BRAND

Introduction:

The Harris Poll's co-CEO William Johnson wrote a very thoughtful Op-ed on the Facebook boycotts utilizing new Harris Poll data revealing the boycott's power lies less in its financial might than its PR profile. To read the article in its entirety [click here](#).

Catch-up on Will's prior appearance on Yahoo Finance's On The Move [here](#).

Section:

# 05

Topic:

## BACK TO SCHOOL? OR GO TO YOUR ROOM?

Introduction:

As the Fall school year quickly approaches, **Americans are greatly divided on the school or home debate**. But can risks be mitigated? Can teachers be protected? And will we leave decision making to communities, states or the government? We take the pulse on parents who see going-or-not as a no-win decision either way.

- **America weighs the risks of reopening schools in the Fall:** Nearly half of Americans (44%) **believe the risks from COVID-19 are still too great** and prefer online learning for their children. Meanwhile, 32% believe the risks can be mitigated **through a hybrid model with a mix of distance learning and in-classroom** instruction.
- **Who is responsible?** Only a quarter (25%) of Americans say **educators have a responsibility to think creatively** and strive to have children in the classroom in the fall, but **this is politically divisive**; 35% of Republicans vs. only 15% of Democrats say it's the responsibility of educators. **Party lines are delineated across risk tolerance**, 56% Democrats vs. 33% of Republicans say the risks are too great to have kids back in school.
- **Right now, it's falling on the families:** 66% say they are more **open to homeschooling their children until schools are back to normal**, which is **highest among those living in urban areas** (74% vs 65% suburban and 58% rural).
- **Parents are worried about their children's ability to thrive without a classroom:** 53% are concerned their children will lose out on the **ability to socialize with their peers and teachers**, which is especially important for rural students (63% vs. 52% suburban and 48% Urban). Nearly half (47%) worry they won't **receive the extra services they require** (therapy/counseling) and 46% fear they will **not learn as well as in-person learning**.

- **Schools are a health and economic lifeline for many:** 31% fear their kids will **not receive the proper nutrition they typically receive in school**. Meanwhile, parents' economic health is at stake; 44% worry about the costs of **having to pay for more at home supervision and costs preparing food which the school normally provides** (34%). As well as their job: 56% are concerned about **juggling work and supporting kids** while at home doing online learning.
- **As for College in the Fall:** 44% believe college should be all online this fall as opposed to a hybrid model (41%) or allow students in person (16%).
- **What do College kids want?:** More than 3 in 10 of those currently enrolled in college or planning to attend in the fall **are planning to stay at home and take courses online**. College students in the hardest hit states are more likely to be planning to stay at home and take courses online vs. those in the Northeast (43% vs. 31%).
- **Hey Colleges, no campus? then pay up:** 83% say that if colleges offer all online courses, they should reduce the tuition rate.
- In the remote world, the return on investment for the online college degree may equate to learning in-person, with 68% saying **online degrees are just as valuable as a traditional degree**.

Implication:

There is no winner here and no easy decision. Pediatricians and childhood development experts say kids need to be in school for socialization, cognitive development and maturation. Parents cite a litany of needs from care-giving to special needs assistance. Yet public health experts warn of asymptomatic transmission. Teachers unions chafed of being treated like guinea pigs even as Republicans label them essential workers. Everybody wants what's best for the kids while stopping the spread. This most likely looks like a state-by-state, district-by-district policy organized around coronavirus caseloads. It didn't have to be this way.



# WAVE 18

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## WAVE 18 INTRODUCTION

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The following research was conducted between **July 2-4, 2020** by The Harris Poll. Fielded among a nationally representative sample of **1,957** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

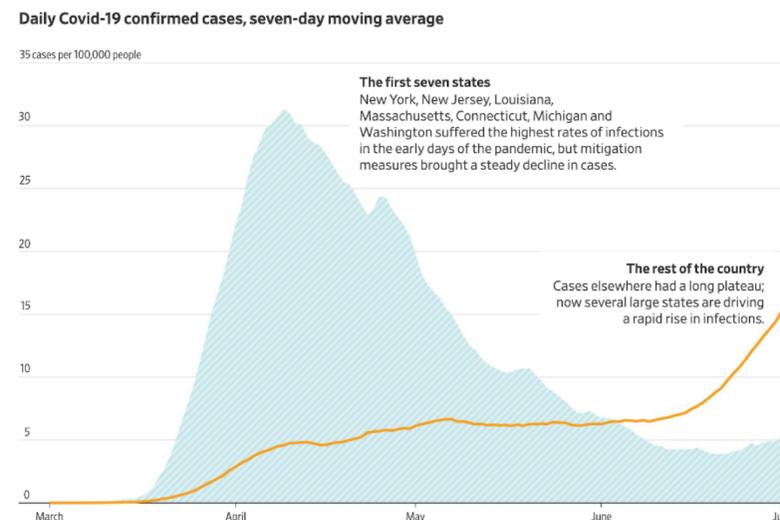
# 01

Topic:

## A TALE OF TWO AMERICAS

Introduction:

At the start of April, New York, and New Jersey accounted for fully half of all cases nationwide. Those two states, plus five others, saw a combined rate of confirmed infections that was nearly eight times that of the rest of the country, according to Johns Hopkins. But as of July 1st, those other 43 states now account for two-thirds of all confirmed cases nationwide.



- [According to the WSJ](#), “Americans are seeing the coronavirus pandemic play out in two parts, as states that bore the brunt of cases in the early months of the pandemic have mostly contained the spread, while a new wave of infections is now threatening much of the rest of the country.” In our Harris Poll data, we can see how hard-hit states like Texas, North Carolina, Tennessee, and California led the surge ([read more here](#)).
- **A lack of coherent federal guidance might in part explain the growing finger-pointing among the states:** 40% say the resurgence of COVID-19 cases is because **people in their state have acted recklessly** by not following safety protocols. Women are more likely than men (43% vs. 36%) to

say this, as are Seniors than either Gen Z/Millennials and Gen X (46% vs. 38% and 36%).

- More than one-third of Americans (37%) think the **biggest driver for the resurgence** in cases is **the White House downplaying the danger** of COVID-19 and diminishing effective defenses such as mask-wearing, testing, and social distancing. Again, women are more likely than men (40% vs. 34%) as are Seniors than Gen Z/Millennials, Gen X and Boomers (45% vs. 34%, 35%, and 37%, respectively).
- All throughout the pandemic, our polling has shown Governors and the States receiving high marks for handling COVID-19. Yet cracks are emerging as the attention shifts away from leaders who were mostly praised early on such as Governors Cuomo (D-NY), DeWine (R-OH), Murphy (D-NJ) and Hogan (R-MD).
- Now almost one-third (31%) of Americans think the resurgence of COVID-19 cases is because **people in their state lack concern for the pandemic** and we simply **do not know enough about the virus** to respond appropriately (29%). An equal number say there is **no incentive for people to follow state recommended safety protocols** as they were not enforced requirements; followed by **the lack of a consistent, unified message from the White House** (28%).
- In the meantime, **Americans tell each other to stay home:** In our new polling, more than three-quarters of Americans (77%) support states enacting **mandatory 14-day quarantines for out-of-state travelers** from states with a high resurgence of COVID-19. Again, women are more likely than men (81% vs. 73%). And of the nearly one-quarter (23%) who oppose, men are more likely than women (27% vs. 19%).
- But no state is an island: According to federal data, [traffic has rebounded to 90% of pre-pandemic levels](#) while Pew reports that **COVID-19 is spreading along the nation’s highways** like I-80 between central Illinois and Iowa, as well as along the I-90 corridor across upstate New York.
- Another statistic that is up: [gun sales](#). A record June extended a surge that began in March as the COVID-19 prompted lockdowns across the country.

Implication:

Nearly half of all U.S. states have paused or rolled back reopening plans as COVID-19 cases continue to rise. From the outset, we lacked federal guidance on mask-wearing, testing, and contact tracing (which some experts now say might be moot). One hope might be in **the women of America**, who have been consistently more cautious and pragmatic in our polling. As critical swing-state voters, their voices might resonate. But right now it’s every state for itself.

## Section:

# 02

### Topic:

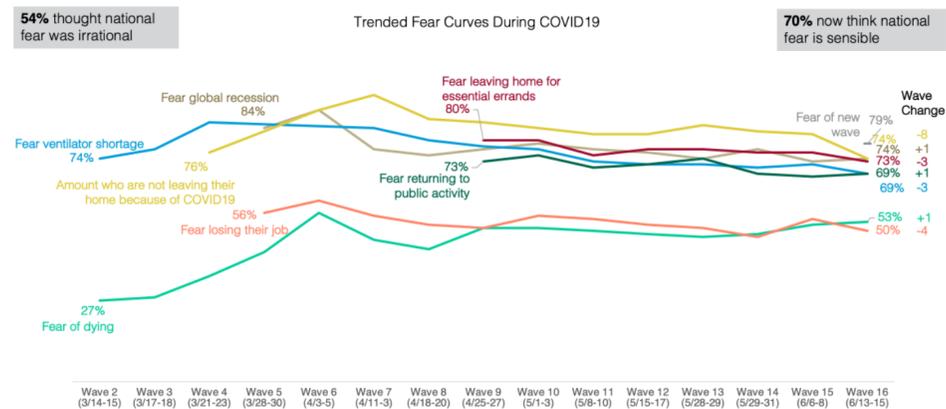
# YOUR JOB OR YOUR LIFE

### Introduction:

Another lockdown amid the economic ruin was unthinkable even a few weeks ago. Now we have those who support another lockdown in the interest of public health vs. those who oppose on the basis of jobs and economics. This chart puts that trade-off into stark contrast:

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

The Task for Marketers: Lifting the Curtain of Fear



- **Loss of job fear:** Almost six in ten (58%) are **concerned that they may lose their job** due to COVID-19, an increase of 5% since just June 29th. Men are more likely than women (65% vs. 49%) to fear losing their job and Gen Z/ Millennials and Gen X are more likely than Boomers and Seniors (61% and 67% vs. 44% and 43%).

- **Loss of life fear:** While deaths from COVID-19 have (as of yet) not risen with spike in caseloads, the American fear is there: **52% fear they could die as a result of contracting coronavirus** (up from 27% when we first asked this question on March 14). This is highest for Seniors (60%) compared to Gen Z/ Millennials (46%) who are being outed as “silent spreaders” and a big driver of the recent resurgence, as reported [in USA Today](#).
- **Mixed reaction to containment efforts:** Americans are split on their support for their state’s approach to re-opening, where 59% support and 41% oppose (Gen Z/Millennials are more likely than Seniors (45% vs. 37%) to oppose).
- **Finding common ground means a plan for staying alive while keeping the economy alive:** While, nearly half of Americans support lockdowns because they believe the past statewide lock downs have **saved millions of lives** (49%) and because people are dying (47%), those who oppose lockdowns say it’s unfair to force people to stay home who are out of work (56%), and a third say their state government has no plan in place to off-set economic hardship for those who can’t work from home.
- What will the pandemic change in the economy? [With department stores disappearing, malls could be next.](#)
- Some industries are getting creative to survive. With no summer concerts, [It’s Garth Brooks at the Drive-In.](#)

### Implication:

The fear of loss of a job vs. a life is an unimaginable calculation only months ago. Short of a national plan, a hyper-local mitigation needs to be put into place immediately across American communities to limit social contact and super spreaders to protect workers and the elderly. We have seen how quickly jobs rebounded when the economy began to re-open. We have seen temerity in the Northeast. Can we endure national sacrifice in order to return to our way of life sooner rather than later? Stimulus in the form of PPP seemed to work effectively. Bear down; because this is still only the first wave we’re still fighting.

[Read More](#)

## Section:

# 03

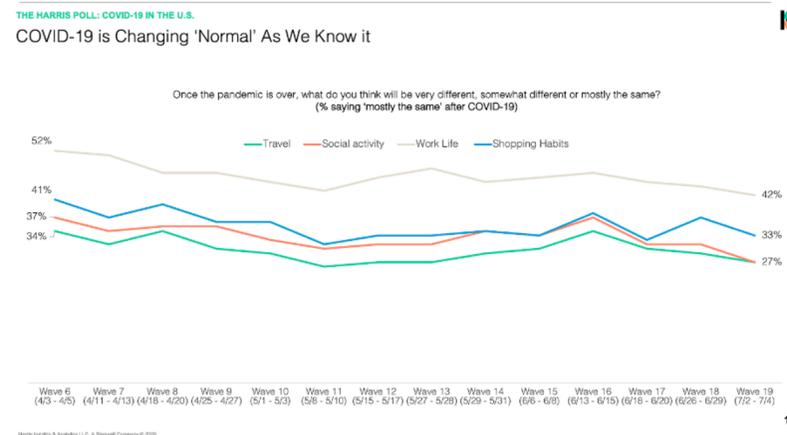
### Topic:

# THERE'S NO GOING BACK

### Introduction:

Our senior strategist [Tawny Saez](#) devised an interesting way to look at the “new normal.” She tracked back over nineteen waves of survey points to see where in American life we’re most resigned to change. Here’s her money chart and her commentary that follows.

- **Letting go of the way things were:** Our trended data shows a **steady decline in the amount of Americans who say core aspects of their lifestyle will return to normal.** For instance, the percentage of Americans saying their **work life and social activity will be the same as it was before has dropped 10 percentage points since April 3rd.**



- What has fundamentally changed? Looking at travel, we see **preferences shift from convenience to safety** (which bodes well for the auto industry): while 43% say they miss flying on a plane, only 37% say they feel safe flying right now. In fact, today **the car is viewed as the only safe mode of transportation**; 90% feel safe traveling by car which is more than 2x the amount who say they feel safe traveling by other means such as Uber (40%), trains (39%) and the subway (29%). And this summer, nearly 65% of leisure travelers say they will **travel by car for summer vacations instead of flying.**

- **Staycations might lead to winter holidays hosted over Zoom:** Looking out on the remainder of the year, (58%) of leisure travelers say they will **substitute vacations with staycations**, and even half (50%) go as far as **substituting winter holiday travel with virtual gatherings.** It's only July but Santa might have to social distance this year, [as reported by the BBC.](#)
- **Do we really need to go back to the office?** Even though many states are allowing offices to re-open with restrictions, 84% say “If work is able to be done remotely, employers should not require employees to return to the office until COVID-19 is no longer a threat.” And after **months of remote working, many are concerned work culture won't bounce back**, (65%) agree “when it comes to our company’s culture, I worry that things will be different when we are physically together again.”
- Semper Ficus: [Who's Keeping Abandoned Office Plants Alive?](#)
- In the meantime, **the work-life adjustments we're being forced to make now might make us more productive** (and less jet lagged): Looking ahead to the remainder of the year, (74%) of business travelers are more likely to **substitute business meetings that require flying with virtual meetings.**
- And as we become accustomed to living with COVID-19, there are some habits that Americans are adopting for the long term: Nearly half (47%) say they will **continue ordering food for delivery** in the medium (21%) to long term (26%). And nearly half (47%) say they will **continue buying products that boost their health and immunity** in the long term.
- **But we're not becoming hermits!** Pent up desire for socializing and growing consumer demand across categories shows that **Americans plan on resuming activity, they just won't be resuming 'as normal'.** For example: 39% of Americans are planning a vacation once things return to normal but it will indeed look different, 73% say their travel vacations will be very/somewhat different after the pandemic ends.

### Implication:

Certainly some routines and habits will snap back, while others will become imprinted. What is a certain is that this is a time for a reset. Every brand, company, institution, and individual is rethinking positionings, relevance and value-proposition. New attitudes and values are an outcome of this pandemic. In the great re-think, values will be a critical guide to defining what makes any entity authentic and necessary. No longer about going back to the way things were, the focus now is on how to rebuild and re-emerge better, stronger and more modern. This is no time to be nostalgic! Let it go...

Section:

# 04

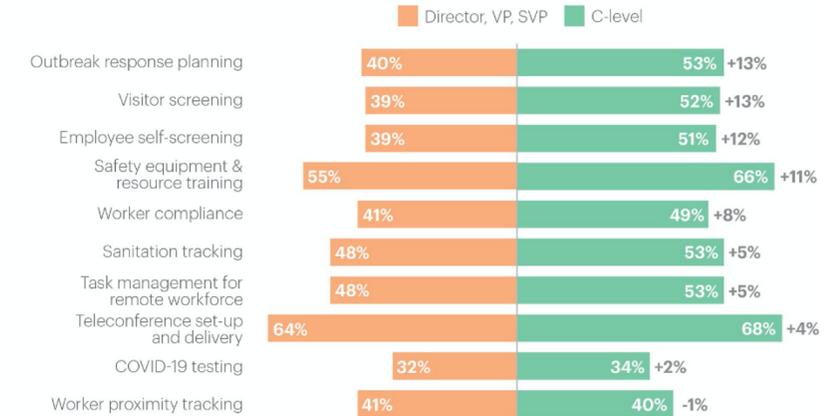
Topic:

## AUTOMATION NATION

Introduction:

The Harris Poll recently conducted [a study with K2](#) - a leader in intelligent process automation - to dig deeper into how businesses are adapting due to COVID-19 to prioritize development of new, automated business processes. Nearly all (92%) business leaders agree that to survive and flourish, companies must utilize digital channels and process automation in the workplace.

- Eight in ten (80%) companies reported that they are facing new challenges as a result of COVID-19, and a large majority of business leaders (88%) agree that the pandemic has revealed an **increased need for process automation**.
- Although businesses are prioritizing development of new, automated processes to address the pandemic, only 7% of businesses are prepared to deal with the breadth of issues COVID-19 brings.
- There is a **disconnect between the C-Suite and the teams under them**. When it comes to C-level execs, 53% believe their companies are very prepared for outbreak response planning versus only 40% of lower level leaders. This disconnect is seen across many additional COVID-19 needs, such as visitor screening (52% vs. 39%) and employee self-screening (51% vs. 39%).



- On average, **only about half (51%) of business processes are automated**. Across regions, only 1 in 5 are embracing and utilizing process automation in its most advanced forms, and nearly 1 in 10 are at the beginning, having only taken initial steps toward automation.
- However, businesses are expecting to **significantly increase the number of processes that are digitized or automated over the next 12 months** – on average, businesses are projecting growth rates of 20%.
- **Automation is also key to meeting customer satisfaction goals**, and more than one-third of 3 companies (36%) across regions are having difficulty meeting those goals. Nearly all (92%) acknowledge that effective use of process automation and digital transformation is key to addressing this aspect of their business.

Implication:

Organizations overwhelmingly agree that business process automation must be embraced and incorporated to address new, immediate business realities as well as to ensure long-term survival. While addressing this disconnect and need for automation is the first step, implementing plans and policies is not an easy road ahead. Those who are most effective at overcoming barriers and rallying their teams to embrace change will be well-poised to win in the post-COVID world.

[Read More](#)



# WAVE 17

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## WAVE 17 INTRODUCTION

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The following research was conducted between **June 26–29, 2020** by The Harris Poll. Fielded among a nationally representative sample of **3,161** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

Topic:

## SHIFTING ATTITUDES TOWARDS LOCKDOWNS AMID CASE RESURGENCE

Introduction:

Amid a resurgence of COVID-19 cases, hard hit states are reversing plans to reopen and re-instituting mandated restrictions in hopes of slowing the spread and preventing overwhelming hospitals. This weekend we asked those in the hardest hit states how they're feeling about facing another lockdown and what they think about how their state has responded.

Here we take a closer look at Arizona...

- **A majority supports another lockdown amid thousands of new coronavirus cases in Arizona:** Nearly 9 in 10 Arizonans (87%) are concerned about a new wave of COVID-19 outbreak in their area. In response, Gov. Doug Ducey on Monday ordered the state's bars, gyms, movie theaters, and water parks to shut down for at least 30 days, a decision that many support: (76%) of those in Arizona said they support another lockdown.

- **Nearly three-quarters (72%) of Arizonans say the first lockdowns were effective in their area, but a majority (61%) oppose their states re-opening:** Just three weeks after the stay-at-home orders were lifted and business closures expired, Arizona saw a big spike in the number of coronavirus cases on June 10th as [reported by NBC](#). In fact, half (47%) of Arizonans say one of the **biggest drivers of the resurgence** is that their state **reopened too soon and that they did not meet the criteria to reopen**. What's more is that (35%) of people in Arizona say their state **reopened in a cavalier manner, without critical systems in place to manage and track the virus transmission**.
- **How did we end up here again? Reckless behavior and no incentives to follow safety guidelines:** We asked people in Arizona what they thought were the biggest drivers for the resurgence of COVID-19 cases in their state and (53%) say **people in their state have acted reckless by not following safety protocols**. Pair that with over a third (35%) who say there was no incentive for people to follow state recommended safety protocols (e.g., masks) as they were not enforced requirements, but rather "recommendations".
- **Willingness to make sacrifices is starting to wane across the country:** While Americans are still willing to make sacrifices to help get America through coronavirus, the numbers are going down. Since March 30th, the percentage of Americans who would be **willing to quarantine indoors declined 10 percentage points** (78%, down from 88%) and those **willing to stop all travel domestically declined 12 percentage points** (76% down from 88%).
- **The pent-up desire to socialize and return to normalcy is gaining on safety:** Since March 23rd, the percentage of Americans who said they **would follow a mandated restriction of convening with groups no larger than 10 people and no dining in bars and restaurants saw a decrease of 9% and 10% respectively** (84% and 83% down from 93% and 93% respectively).

Implication:

There are two camps of philosophy when it comes to lockdowns in America; those in opposition say lockdowns put greater strain on our economy (61%) while also threatening our fundamental American freedoms and rights (47%); meanwhile, those in support say we need to make sacrifices now if we want any real chance at fighting COVID-19 (55%) and unless mandated to stay home, people won't follow the safety protocols and guidelines (52%). One thing is true, COVID-19 is not waiting for us to reconcile our differences; leaders must be decisive and act swiftly.

Section:

# 02

Topic:

## CELEBRATING JULY 4TH DURING COVID-19

Introduction:

America's birthday will look different this year without the iconic traditions that draw large crowds, but that's not getting in the way of enthusiasm; three-fifths (59%) say they are excited for the Fourth of July this year. And let's face it, after four months of COVID-19, we all need something to look forward to. Here's the American mindset going into the holiday weekend:

- **The American spirit is still alive:** Reflecting back on the most famous words of the Declaration of Independence - 'life, liberty and pursuit of happiness' - most Americans (69%) agree this spirit is alive today. And 78% say the Fourth of July is important to them, their family, and community - especially Seniors (82% vs. 73% of Gen Z/Millennials). The top reason Americans say July 4th is important to them is because **American independence is an important part of our history to be celebrated** (60%).
- **An important reminder to take stock of what we've got:** 54% say July 4th "reminds me **why I am grateful to live in America**" and 42% say "reminds me of fond memories of my childhood."
- **Our communities need a moment of joy:** Half (51%) say they are excited this year because we all need something to look forward to, 35% say **their community deserves a moment of joy**, 34% say the Fourth of July **brings my community together** and we need that now more than ever. And we could all use a break from the same walls we've been stuck inside the last four months: 30% say their family and they need an activity to get out of the house.

- **Will Americans be celebrating at all this weekend? Yes.** Four in 10 (39%) say they are attending or hosting a social gathering this year to celebrate. Younger Americans are the most likely to be celebrating (51% Gen Z/Millennials, 50% Gen X vs. 31% Boomers, 17% Seniors).
- **How will Americans celebrate this weekend?** Well, those in [Los Angeles](#) and [Miami](#) won't be going to the beach. Instead, one-third (34%) say they will be celebrating at home with other people in their household or (32%) watching fireworks from their home. Despite being a mainstay of Fourth of July celebrations, many cities are [cancelling fireworks altogether](#) this year.
- **Many say they feel safe celebrating and will follow safety protocols:** Two-thirds (66%) of Americans say they feel safe celebrating the Fourth of July this year - with younger generations (68% Gen Z/Millennial, 72% Gen X vs. 60% Boomers, 61% Seniors) feeling the safest. And thankfully, nearly all (94%) of those attending social gatherings say they will follow at least some C-19 safety protocols this weekend, including half (52%) who plan to wear a mask.
- [The New York Times](#) provides a guide in how to honor America's birthday (safely) in 2020.

Implication:

Though celebrations will look quite different this weekend, Americans are looking forward to a weekend of happiness and a short reprieve from the weight of the pandemic and social unrest.

Section:

# 03

**Topic:**

## COVID-19 IS CHANGING HOW WE TRAVEL THIS SUMMER - WILL IT STICK?

**Introduction:**

The Fourth of July might be the holiday that sets the stage for summer travel amid pandemic, ([Condé Nast Traveler](#) says this could be the busiest travel weekend since March).

- Could this be the summer of the 'Great American Road Trip'? Maybe! **Americans now think road trips are safer than flying** and will take more road trips to avoid airline usage this year. Around two-thirds of Americans (67%) say because of COVID-19, they'll probably be taking more road trips this year to avoid airline travel. Our latest research finds **summer travel plans are picking up** with nearly a third (29%) of Americans say they will travel in the next 4 months.
- **Americans say hotels are safer than Airbnb:** More than 3 in 5 Americans (65%) say in terms of sanitation practices, they think staying at a hotel is a safer option than staying at an Airbnb or other vacation rental. Americans indicate they are more comfortable at a hotel (55%) than at an Airbnb or other vacation rentals (42%).

- **Marketers should take notes from hotels:** Overall Americans agree that "Hotels have implemented enough new cleaning procedures to protect against the virus" (61%) and that "**Hotels have done enough to reassure me that staying at a hotel will be safe**" (60%).

**Implication:**

It's hard to predict if the behaviors we adopt during COVID-19 will stick or if our normal habits will bounce back, but right now, Americans are planning with precaution: when taking their next leisure trip, Americans are increasingly more likely to include a hotel stay over Airbnb/vacation rental (45% vs. 14%).

Section:

# 04

Topic:

## FROM THE INVESTOR PERSPECTIVE

Introduction:

The Harris Poll announced this week that we are [partnering with Yahoo Finance](#) on an [ongoing poll of investors, market and consumer trends](#). The survey takes a deep dive to better understand how work, spending, and investment habits have changed due to the Coronavirus. Here are a few key highlights:

- **The COVID-19-triggered recession is hitting women harder than men**, with only 47% of women saying they are still in the same job they held before the pandemic hit vs. 63% of men. Job losses hit Gen X women hardest, with 19% of women ages 35-44 saying they had been laid off or furloughed, compared to just 2% of men in that group.
- Across all age and income groups, Americans are cutting back, with 82% saying they have **reduced spending**. Again, there is a split between men and women, with 71% of all men predicting their spending will return to normal within a year vs. 62% of women. And one in seven women ages 55-64 say they think their spending will never return to normal.
- **Individuals are both pessimistic and optimistic when it comes to the markets**. Four of 10 people expect their investments will lose value over the next five years, with another 10% foreseeing a gain of less than 5% over that time span. Yet one-third of people are bullish, saying this is a good time to invest in equities.

Implication:

As seen in the inaugural survey, COVID-19 has presented the American people with a wide range of challenges. As we continue to progress and adapt to these difficult times, consumer insights will play an important role in uncovering the constantly changing beliefs on how investors are viewing the current state of the stock market.

*With the launch of the Yahoo Finance-The Harris Poll [Investor Index](#), investors will gain access to insights from a poll of sample investors that will occur twice a month to produce insights on consumer and workplace trends as the nation struggles to recover from the coronavirus pandemic and the punishing recession it has caused.*

Section:

# 05

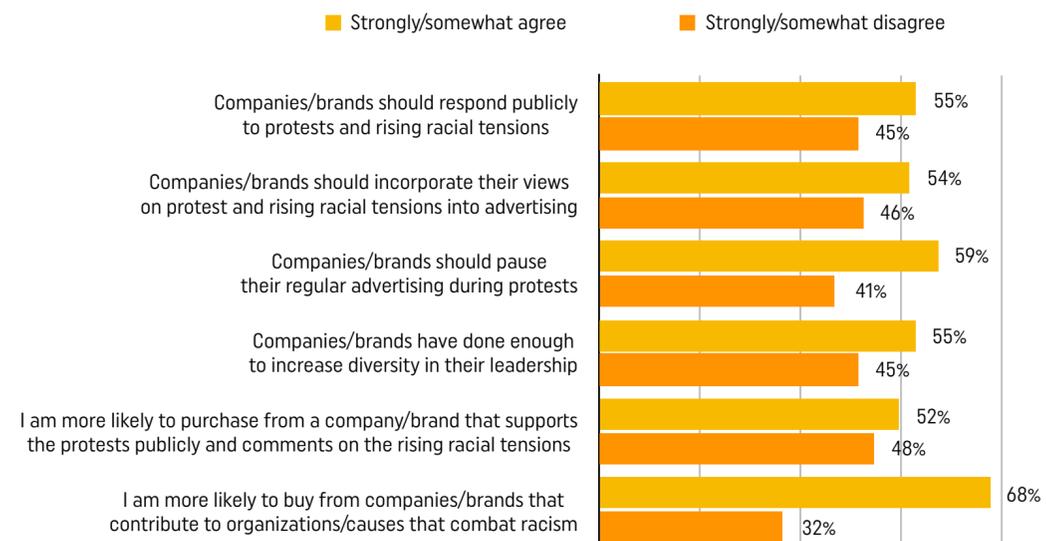
Topic:

## BRAND BEHAVIOR AMID SOCIAL UNREST

Introduction:

The Harris Poll also [announced last week](#) that they will be the exclusive polling partner for Ad Age, delivering business trends and insights from consumers and marketing leaders, as well as help brands understand and navigate ongoing industry disruptions. In the [inaugural survey with Ad Age](#) published last Wednesday, we looked at how consumers feel about brand behavior in response to the protests and rising racial tensions in America.

While results were mixed on brands' public statements and advertising strategy, there was broader agreement that brands should not pause advertising during the protests and, especially, that they should contribute to causes that combat racism.



Implication:

In this day and age, it's no longer acceptable to be silent.

[Read More](#)



# WAVE 16

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## WAVE 16 INTRODUCTION

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The following research was conducted between **June 18–20, 2020** by The Harris Poll. Fielded among a nationally representative sample of **1,962** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

Topic:

## AMERICAN STRESS

Introduction:

If you seem to feel every week gets a little rougher, you're not alone: [Our new Harris Poll study](#) with **The American Psychological Association** finds more than 7 in 10 (72%) Americans say that **this is the lowest point in the country's history that they can remember**. And that's causing a lot of stress and anxiety.

- Eight in ten (80%) Americans say **the nation's future is a significant source of stress**. This, following protests over racial injustice — all set against the backdrop of the COVID-19 pandemic — has America on edge.
- Speaking on the Harris-APA data, Arthur C. Evans Jr., APA's CEO says. "We are experiencing **the collision of three national crises**—the COVID-19 pandemic, economic turmoil and recent, traumatic events related to systemic racism. As a result, the collective mental health of the American public has endured one devastating blow after another, the long-term effects of which many people will struggle with for years to come".
- Our poll also finds that 55% of **Black Americans say discrimination is a significant source of stress**. At the beginning of May, only 42% said the same. And in the most recent civil unrest poll, more than 7 in 10 Americans (71%) say **police violence toward minorities is a significant source of stress**.
- Consider the context. **Stress is everywhere**: We're lonely (43%), annoyed (31%), claustrophobic (32%), missing friends and family (76%), eating out (74%), and celebrations like birthdays and holidays (69%) are contributing. We're frustrated with online education and not knowing when the economy will recover. We fear some things will be changed forever like travel (33%) and social activities (26%).

- **Stress is also taking a toll on young people**. In a separate [Harris Poll study with The National 4H Council](#), 60% of teens said they're feeling lonely, and more than half said they're feeling anxious. "It is clear to us based on the survey findings that COVID-19 has had a measurable adverse impact on teens' mental health," says Jennifer Sirangelo, CEO of 4-H. "For example, 61% of teens said that the COVID-19 pandemic has increased their feelings of loneliness."
- One terrible statistic: [the suicide rate among Black youth](#) is rising faster than other young people. "From sheltering at home to economic dislocation, political division, and racial hatred, our mental health and wellness are also under attack." Says APA's Evans, "We don't have to be passive players in mitigating the rapidly increasing stress Americans are facing and its consequences on our health."
- **The age of anxiety**: Our latest Harris COVID tracker fielded this past weekend shows 80% of Americans are afraid to leave the home, while equal numbers (51%) of Americans fear losing their job and dying of coronavirus.
- People also **sense loss of human connection**. In our surveys, 64% miss socializing, 76% miss seeing friends and family, 74% miss going out to dinner, 51% miss going to church, and so on. Most of the loss of routine is anchored in the loss of daily connection, whether it's making a run for coffee or seeing a baseball game.
- Have you reached peak stress? Not yet, if you're an urbanite and freaked out by [the rampant rise in illegal fireworks](#).
- See this [Business Insider story on our data](#) and the [APA press release](#). And to go deeper read the full report.
- Read our Harris Poll survey in [The New York Times](#) on Gen Z and alienation.

Implication:

Most of the narrative of the past three months has been a public health crisis of the literal kind. Yet the growing nature of this pandemic's toll, coupled with facing ugly truths of racism and indifference in American society is causing excessive strain on our mental health and wellness. Fortunately, states are re-opening, conversations are ensuing, and our data also shows young people are more apt to seek out therapy and support (it's not at all taboo). As for the rest of us, Keep Calm and Carry On has worn out its effectiveness.

Section:

# 02

Topic:

## WHIPLASH

Introduction:

[The Harvard CAPS Harris Poll](#) was released this week showing a startling turn in American sentiment on a number of measures:

- Almost two-thirds (64%) of Americans now **say the country is on the wrong track** and the number of voters who see the country on the right track (27%) is now at an all-time low for our poll.
- The survey overseen by **MDC Partners and Harris Poll Chairman Mark Penn** also found nearly two-thirds of voters (61%) say the U.S. economy is weak – **a stunning three-month flip** in attitudes from 25% in mid-December.
- Yet while economic confidence is still low, it is **showing some signs of rebounding** with those saying the economy is on the right track ticking up 3pts to 30% and the pessimists declining 5 pts to 60%.
- Also, the combination of PPP, states re-opening, and an improved stock market have resulted in views on **American's personal finances to stabilize** as the number of voters who say their economic situation is declining is now decreasing from 40% in March to 31% today. 42% say their economic situation is the same and 22% say it's improving.
- The green shoots of optimism are tempered in that almost half (49%) of American voters still expect the U.S. **to be in a recession six months from now**.
- Despite majority support for utilizing the national guard, **President Trump's approval declined** by 4 points for the second month in a row; he's now at 43%. He receives low marks in the low 40s for his handling of the coronavirus (44%), issues of race and policing (43%), and responding to civil disorder (42%).
- Other stats that caught our eye...President Trump (39% favorable; 56% unfavorable) vs. his presumed contender, Joe Biden (47% favorable; 44% unfavorable); The U.S. Military scores highest (80% favorable; 12% unfavorable) while Bill DeBlasio brings up the rear (21% favorable; 39% unfavorable).

- What does the Fall campaign stump look like? The **coronavirus remains the biggest issue facing Americans today**. Today, 61% think infections are growing faster (up from 49% in May), 64% think we are opening up too soon, and 74% think there will be a second wave in the Fall.
- Read more: [What We Know—and Really Don't Know—About the Future of COVID-19 Vaccines](#)
- [Read the full report](#) and listen to [Mark's Podcast](#).

Implication:

As America fights COVID, debates police reform and fights for justice, voters typically vote on the economy, jobs, and the sense of the direction of the country. All of them have a large room to improve, but it's only Summer...

Section:

# 03

Topic:

## THE SAFETY DANCE

Introduction:

Public opinion can be messy and contradictory, especially as attitudes are shifting. Some things become imprinted while others snap back... But this week The Harvard CAPS Harris Poll found nearly equal support for policing and Black Lives Matter:

- **There is tremendous support for both Black Lives Matter and the police:** Police in America are viewed favorably by 62% of voters (32% unfavorable) and Black Lives Matter is viewed favorably by 55% of voters (33% unfavorable). Most voters (64%) also think that most police operate according to the rules, while 36% say they operate in biased and unfair ways. Voters are also against defunding the police (72%).
- **But voters recognize police misconduct:** Majorities of voters recognize police misconduct in cases like the death of George Floyd are fairly common (56%) including 86% of Black people of all ages. **Majority call for reform but are split on how:** overwhelming majorities support mandatory body cameras (88%) and banning choke holds (79%). But voters are split between the need for major reforms and restructurings of how police works (47%) and minor reforms and improved training (46%).
- Our Harris Poll study shows **genuine empathy for the movement among people of all ages** and hopes that advancements against systemic racism will finally happen. Today, 58% of Americans now believe that racism is systematic and pervasive in America and 63% believe the recent events in the movement for racial equality and justice will **result in meaningful changes as to how black people are treated in America.**

- **But the problem is the complex intertwining of safety with protests:** Americans have the tendency to see them as trade-offs in a zero-sum game. While over two thirds (67%) of voters in the recent Harvard Harris Poll thought the **protests in response to the deaths of George Floyd were an appropriate response** to police fatalities, on the issue of riots and looting 47% of voters believed **cities were too soft in their response.**
- **America wants change but not with disorder:** When asked, which of the following problems in the news do you want your political leaders to tackle the most, there is **near equal desire for leaders to address both civil disorder** (24%) and **issues of race and policing** (28%); trying to solve two competing issues at the same time creates a lot of discord and discomfort.
- **We are entering the most important but uncomfortable part of a Paradigm Shift,** which is disorientation, an unavoidable but necessary step in the process of adopting a new way of doing things. This is the hardest step because it requires the most amount of change which can be uncomfortable and can make some **people fear loss of normalcy:** just last week, 49% of Americans said protecting private property from damage is more important than protecting freedom, rights, and safety of Black Lives Matter protests. **Change can also be alienating,** in fact 63% of Americans agree “what you think doesn't matter anymore.”
- **While change feels radical, the output is not.** In fact it's an outcome that most Americans say is important to them personally; changing the conditions that black communities are living and existing in, in order to create a world that is more just and equitable.
- **Follow the money:** The protests [fuel record traffic to donation sites](#). **"Visits to police reform organization sites** grew tremendously year over year — in looking at daily traffic trends, these sites went from receiving less than 1,000 visits per day to nearly 88,000 visits per day during the first two weeks of June," said Ilana Marks, Marketing Analyst at Similarweb.

Implication:

Americans, corporations, leaders have all joined in the movement to finally put teeth into Black Lives Matter. But the underlying social constructs in racism are built on layers and layers of White American fear in losing status, wealth and property. We need to advance and protect the lives of Black Americans by not only joining the movement, but dismantling this trope that is as old as the country itself and still seen in the data we've shared above.

Section:

# 04

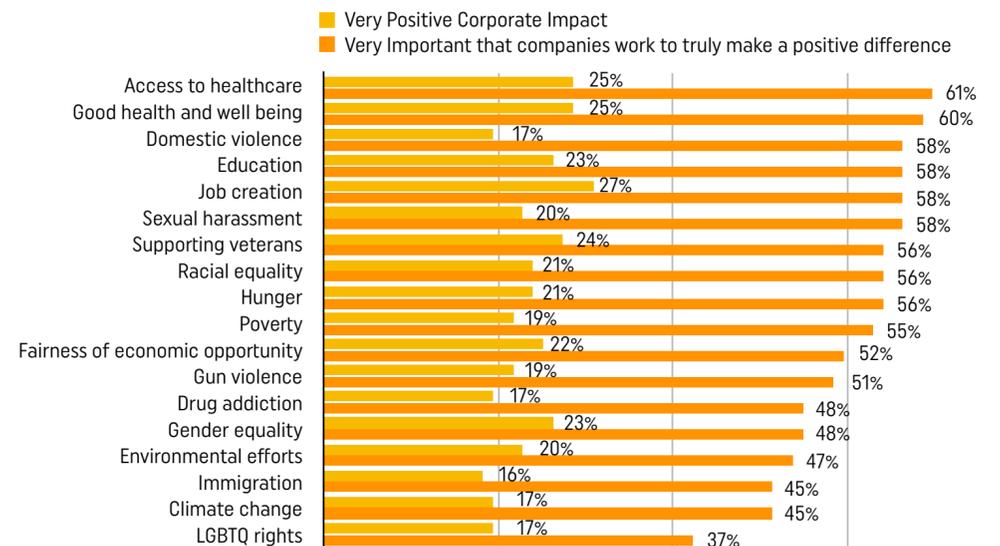
Topic:

## AMERICANS TO COMPANIES: “DO MORE FOR SOCIETY”

Introduction:

New Harris Poll data finds that the American public is rooting for companies to make a positive difference on social issues, **but there is a gap between urgency and perceived corporate impact:**

- This weekend we asked Americans how important it is that companies work to truly make a positive difference on specific societal issues and how much of a positive impact they have seen from corporate America. What we found is a large gap between the desire for corporate impact and the perceived positive impact from companies:



- **The time to act is now:** 58% say companies should incorporate their views into advertising; 51% say companies should speak out on racial inequality in America, but **there is more work to be done on the inside:** 43% say **companies have not done enough to increase diversity in their leadership** and nearly a third (28%) say their **employer has not made meaningful efforts** internally to address racial inequality.
- **The ‘company’ you keep matters:** Reputation isn’t just messaging matching values but also the company you keep: Nearly three-quarters of Americans (72%) say companies should **ensure businesses they do business with share similar standards** when it comes to combating racial inequality (up 5 pts from last week) and 61% say they are more likely to buy from companies that contribute to organizations that combat racism.
- The public welcomes Corporate America to step up for racial inequality, **but there is ground to make up:** Eight in ten (82%) say it’s very/somewhat important to them personally, that companies work to truly make a positive difference on racial equality, but only 21% say companies have made a very positive impact.
- Also, the Harvard Harris Poll found 69% of voters do not believe that news editors or CEOs should lose their jobs if they criticize Black Lives Matter, at the same time as 6 in 10 support corporations donating millions of dollars to the BLM movement.
- One thing is clear, nobody wants to be a ‘Karen’. Babynames.com reports that [Karen as a baby name is down 75%](#).

Implication:

**What a company does is more important than what it says** and here, metrics matter. Company messaging is appropriate, but only if you have your house in order. This means representation in leadership, boards and a culture that isn’t toxic and stymying. It means eliminating biases in hiring and promotion and design thinking around Black experience in your products, your customer satisfaction, and your operations daily management interactions. Many companies are behind, so set targets, show your struggles and find safe spaces for Black voices. Tie progress to compensation and performance and find other ways to make it stick. This isn’t window-dressing, but fundamental social, enterprise and personal change.

Section:

# 05

**Topic:**

## THE KIDS ARE NOT ALRIGHT

**Introduction:**

This was pretty much inevitable. Back on May 15th (seems like five years ago) we reported there was a generational war brewing over COVID and safety.

- Americans over 50 said the **nation's youth are acting 'young and reckless'** during C-19: Three quarters (75%) said that young people act as if social distancing restrictions don't apply to them and 73% said youth are acting recklessly 72% said they are putting the rest of the nation's health at risk.
- At the same time, more than half of younger Americans age 18-49 (56%) say the over-fifties crowd is stubbornly sticking to their routines even though they are more at risk.
- But younger people might be more averse to following recommended safety precautions: Gen Z/Millennials are the least likely of all generation to have a positive view of people who use PPE in public spaces (59% vs. 69% Gen X, 67% Boomers, and 81% Seniors) and they are least likely to commit to wearing PPE long term until a vaccine is created (35% vs. 47% of Seniors).
- Fear of the pandemic is not abating: the percentage of Americans saying the fear of C-19 is sensible given how serious the pandemic is remains unchanged, 71% since May 15th.
- One theory: Old people are trying to escape areas of young people: [Harris Poll data in the Wall Street Journal and on CNBC](#) this weekend showed the continuing flux of city residents fleeing to the countryside in a way that may be more than just a Summer jaunt. In the U.S., 39% of urban dwellers said the COVID-19 crisis prompted them to **consider leaving for less densely populated areas**, according to a Harris poll of 2,050 adults conducted in late April.

- This comes as COVID cases rise across the country. While deaths are declining, The [CDC updated the COVID-19 Forecasts](#) for the U.S. suggesting that there will likely be **between 124,000 and 140,000 total reported COVID-19 deaths by July 4th**. The state-level ensemble forecasts suggest that the number of new deaths over the next four weeks in Arizona, Arkansas, Hawaii, North Carolina, Utah, and Vermont will likely exceed the number reported over the last four weeks. For other states, the number of new deaths is expected to be similar or decrease slightly compared to the previous four weeks.
- As such, 77% of Americans think the lockdowns were effective and 79% are worried about a new wave. Facing uncertainty, most Americans are taking a practical approach to the future; 71% support another lockdown if there's another surge in cases.

**Implication:**

Fault lines are developing not only between young and old but the politicizing of face masks. There are the 'anti-maskers', who like anti-vaxxers ignore science and fact. But the truth is America is in a plateau, not a decline. And most Americans get this: 79% fear the second wave of COVID, but the reality is we haven't beaten down the first.

Section:

# 06

Topic:

## PLEASE, IS THERE SOME GOOD NEWS?

Introduction:

Set against this backdrop of stress and anxiety, we thought it might be time for some hope and optimism, so consider these stories that happened this week:

- [Orthodox Jews in Crown Heights have taken up the cause of Black Lives Matter.](#) Given the history of racial strife and rioting in this neighborhood, it seems young people are taking up the torch of inclusivity. 61% of Gen Z/ Millennials say **moving forward, racial equality will be very important to them personally** vs. only 49% of Boomers and 45% of Seniors. **They are also the most optimistic:** 75% of Gen Z/Millennials believe the recent events in the movement for racial equality and justice will result in meaningful changes as to how Black People are treated in America (vs. only 52% of Seniors).
- And finally, two-thirds of Americans (66%) in our [USA-Today Harris Poll](#) said they supported making Juneteenth a national holiday — the official end to slavery that was commemorated last Friday, June 19th. Younger were more likely to support (81%) vs. older (58%). And Black Americans support at 84% compared to White Americans (61%), and Hispanics (67%).

Implication:

We'll let the good news speak for itself.



# WAVE 15

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## WAVE 15 INTRODUCTION

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The following research was conducted between **June 13–16, 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:**

## **BELIEVE IN SOMETHING... EVEN IF IT MEANS SACRIFICING EVERYTHING**

**Introduction:**

The markings of social change lie in symbols and iconography, like a toppled statue, a protest song or even an ad. We had polled America's reaction to [Nike's Colin Kaepernick ad](#) in 2018 and re-tested it this past weekend. And American opinions have shifted to support Kaepernick, Nike, and the NFL's new stance on racism:

- Back when [we polled Americans with ESPN](#), we found significant polarization on the ad with young men connecting, while the general public was neutral to negative and even threatening to boycott.
- Now a **new Harris Poll** with The Athletic released Monday ([firewall - see full article here](#)) shows that two years on, **negative impressions of Nike have been cut in half**: from 17% in 2018 to just 9% in 2020.
- Also **Nike Boycotters are disappearing**, especially older and conservative Americans. In 2018, 21% said they would either boycott or just stop buying Nike products -- now that number has dropped to 14% today. And the biggest movers are Seniors 65+ (from 34% 'boycott/don't buy' down to 18%) and Conservatives (from 41% 'boycott/don't buy' down to 24%).

- And of the three major athletic apparel brands, **Nike is the only one to see a strengthening of its reputation** this past weekend since the Kaepernick ad campaign. Today, 54% of the general population have a positive opinion of Nike in our new survey, up 6-pts from 48% in September 2018. Under Armour is down 8-pts to 40%; Adidas: down 1-pt to 51%.
- Also, **Nike's perception is soaring among young men**: in 2018, (54%) of men 18-29 had a positive impression of Nike. Today, that's jumped up to (66%) of young men viewing Nike positively.
- **The NFL is doing better too**: As our NFL data, featured in Axios this morning, shows, in 2018 only 25% of Americans thought that the NFL's response to national anthem protests was positive. In 2020, this increased, up to 32% in light of the ongoing movement.
- Also, **good marks for Roger Goodell**: In the new 2020 survey, America feels **the NFL is taking meaningful steps** with 3 in 4 people (73%) pleased with the action Goodell has taken. Among them: 69% support his statement condemning racism and oppression. Only 31% opposed the statement. Furthermore, 73% say it is a step in the right direction and 68% say it shows that the NFL is making meaningful action to evaluate their role in racism.
- We also asked people to agree or disagree with a number of statements (mutually exclusive). Among them, 66% agree it felt insincere "they are just doing it for publicity," yet a near equal number (64%) say **NFL carries the greatest burden** of any sports league to rectify the damage it now admits it has done.

**Implication:**

In 2018, Nike's Colin Kaepernick ad was framed in a narrative of division and disrespect. But now it increasingly symbolizes unity and inclusion. Seeing the public (and the NFL) soften on Kaepernick is the start of a conversation, the kind that is happening all across America.

Section:

# 02

Topic:

# THE ESSENTIAL 100

Introduction:

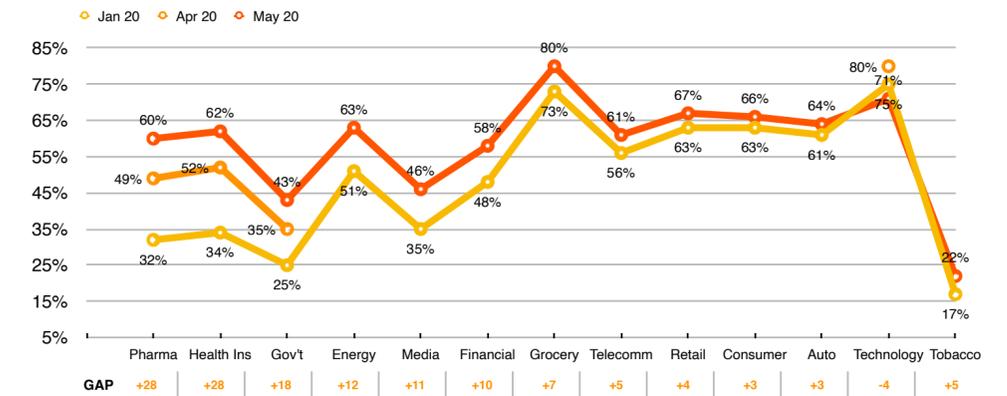
On Friday we launched [The Essential 100](#), a ranking of corporate performance amid the C-19 pandemic. [The Top 10](#), based on the survey, are (in order): **United States Postal Service, Clorox, Google, United Parcel Service, Walmart, Amazon, Purell, Microsoft, FedEx, and CVS.**

The Harris Poll Essential 100 Ranking: Full Composite

1 U.S. Postal Service	26 UnitedHealth Group	51 The Walt Disney Company	76 Cardinal Health
2 Clorox	27 McDonald's	52 Whole Foods	77 American Express
3 Google	28 3M	53 Delta Air Lines	78 NFL
4 UPS	29 Target	54 Toyota	79 AT&T
5 Walmart	30 Chick-fil-A	55 Southwest Airlines	80 NBA
6 Amazon	31 General Mills	56 Xfinity	81 MLB
7 Purell	32 Best Buy	57 Cottonelle	82 Pfizer
8 Microsoft	33 General Electric	58 United Airlines	83 Door Dash
9 FedEx	34 Costco	59 Intel	84 Marriott
10 CVS	35 Domino's	60 Perdue Farms	85 T-Mobile
11 Samsung	36 Nestlé	61 PepsiCo	86 Public
12 Johnson & Johnson	37 Campbell's	62 IBM	87 Honeywell
13 YouTube	38 Kroger	63 Hewlett-Packard Enterprise	88 Bank of America
14 Coca-Cola	39 Tyson Foods	64 U.S. Bank	89 Kaiser Permanente
15 Walgreens	40 Bayer	65 Scott	90 GlaxoSmithKline
16 Netflix	41 General Motors	66 Trader Joe's	91 Aetna
17 Apple	42 Verizon	67 Hulu	92 eBay
18 Visa	43 Anthem Health	68 American Airlines	93 Macy's
19 Mastercard	44 Aldi	69 Little Caesar's	94 Starbucks
20 The Kraft Heinz Company	45 Dollar General	70 Smithfield Foods	95 Nissan
21 Lowe's	46 Dell	71 Humana	96 Facebook
22 Procter & Gamble	47 Pizza Hut	72 Papa John's	97 McKesson
23 The Home Depot	48 Sam's Club	73 Nike	98 Conagra
24 The Hershey Company	49 Sony	74 Zoom Video	99 Capital One
25 Ford	50 Burger King	75 Boeing	100 ESPN

- This ranking which was featured in [Alan Murray's CEO Daily](#) on Monday measures corporate responsiveness, trust, integral and lasting ability to find solutions to the pandemic. The major themes underlying corporate reputation right now include America's preference for large logistics-driven, resourced, and innovative companies because they represent safety, reliability, and proven performance. Logistics meant **things kept working in daily life**, despite COVID and the economic shutdown.
- For instance, many of the top performing companies were visible throughout the crisis (delivery services) or pivoting to different goods and services, reinforcing supply chains, or seeking cures for the deadly virus.
- The other thing: Many reputation studies cite the erosion of trust in Corporate America. We see exactly the opposite. This chart shows how corporate reputation is rising across all industries, even pharma, financial services, and tech.

How would you rate the overall reputation of the following industries?



- You can download the full deck [here](#).

## Implication:

In the global financial crisis, Corporate America was part of the problem. Now, they are part of the solution. Reputations are being remade during these unprecedented challenges, even industries that held longstanding headwinds like pharma and financial services. We will have a new **Axios-Harris Poll 100 study of corporate reputation** coming out in late July.

[Read More](#)

Section:

# 03

Topic:

## HOW TO RESPOND IN THE AGE OF UNREST

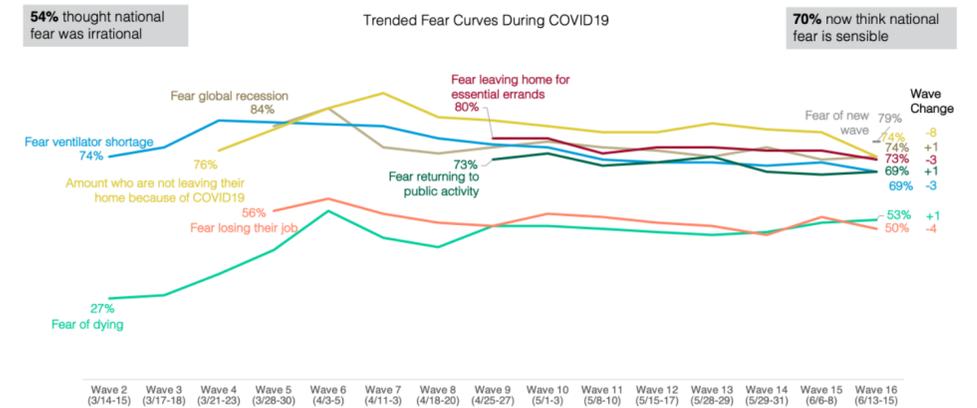
Introduction:

We are living through a moment in history. One marked by social unrest amidst an unprecedented fifty-state closure with activists in the streets of America calling out for racial equality. Here we look at the number of social and economic obstacles society face and the role that companies and brands can play in guiding America forward.

- Let's start with the number one obstacle to a full re-opening, which is the virus itself. As of this weekend, C-19 cases are climbing in twenty-two states resulting in 79% of Americans [this weekend](#) saying they **fear a second wave of coronavirus**.
- In an [Axios poll yesterday](#), 8 in 10 Americans say they are concerned about a second wave of the coronavirus, with large majorities saying they'll resume social distancing, dial back shopping and keep their kids out of school if it happens. In our data, 70% feel the fear around C-19 is justified.
- But people are beginning to venture out, reflected in a **drop of those fearful to leave their house for essential errands** at 73% this week, which was in the eighties as of two weeks ago. Still, Americans face the twin fears of dying (53%) or losing their jobs (50%).

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

The Task for Marketers: Lifting the Curtain of Fear



- **American patience is also on the wane.** While more than three quarters (77%) say their state has partially reopened, a fewer number (59%) support their state's approach to re-opening. In fact, more than 2 in 5 (41%) oppose their state's approach to re-opening, especially in the South (46%). While more than three quarters of Americans (77%) think the **lockdowns were effective in their area**, a fifth think they were not (20%). Gen Z/Millennials are more likely than Seniors to think the lockdowns were not effective (28% vs. 16%), or to say **they are not concerned about a new wave of COVID-19** outbreak in their area (26% vs. 17%).
- **Women are more cautious than men** and are more likely to say they plan on continuing to wear PPE in public (46% vs. 39%) and plan on continuing to save more and spend less (53% vs. 41%) in the long term.
- At the same time, the nation is coming face-to-face with a parallel wave of social unrest driven by racial injustice, and Corporate America is now pledging to play a bigger role. Some are being pushed by employees or by a fear of losing customers. The issues companies are wrestling with range from inequalities in hiring, pay and promotion, [fostering toxic workplace cultures](#) and consumer discrimination, among others.

Section:

# 03

- In our new Harris Poll, Americans feel their **spending power can bring about change**. More than 3 in 5 Americans (63%) say they are more likely to buy from companies and brands that **contribute to organizations/causes that combat racism** while over two-thirds (67%) say companies/brands should **ensure businesses/clients they do business with share similar standards** when it comes to combating racial inequality. Women are more likely than men to say this (70% vs. 63%) as are Black People (73% vs. 65%).
- And a third of Americans (32%) believe **companies/brands have not done enough to increase diversity in their leadership** while (57%) say they should **respond publicly to protests and rising racial tensions**.

## Implication:

How do you respond in an age of anxiety? Carefully and confidently: Right now, Americans want authenticity and action, 74% think companies should speak out on C-19 and 57% say companies should incorporate their views into advertising. Americans also want inclusion, 88% say racial equality is an important issue to them, personally. But corporate values must be reflected on the inside first and shared in a meaningful way, as 26% say companies advertising during C-19 are just doing it for publicity. For Corporate America, responding in this day and age is not about what you say, it's about what you do.

Section:

# 04

Topic:

## TECH LASH-LASH

Introduction:

Since the outset of the pandemic, the technology sector has received a strong and consistent approval in their C-19 response, with 55% of Americans saying technology has had a good reaction to the pandemic. But the backlash on the use of facial recognition by law enforcement and the act of censoring (or not) misleading information is but one litmus test for tech's promoting of civil rights.

- **Americans will give up privacy to fight C-19:** More than 3 in 5 Americans (61%) are willing to share their contact information with the government and 81% support using their data to help trace coronavirus cases. **In fact, fighting C-19 has become part of American patriotism:** 85% say Americans have a responsibility to each other to take preventative measures to limit the spread of C-19.
- **But, there is a new backlash on facial recognition technology amid the fight for racial equality:** Just this week [Senators voiced concern for the technology being used on BLM protesters](#), citing misuse during the 2015 protests in Baltimore following the death of Freddie Gray in police custody, where [law enforcement used facial recognition](#) to identify Facebook profiles and target arrests for outstanding warrants.
- **Tech is now pivoting to support equality and civil rights:** Just this week, [IBM announced](#) it will stop developing facial recognition technology, [Amazon announced](#) a one-year pause on letting police departments use its facial recognition tool, and [Microsoft banned the sale of facial recognition technology](#) to police without federal regulation. Washington Post deep dives into how [Black Lives Matter could change facial recognition forever — if Big Tech doesn't stand in the way](#).
- **Meanwhile, social media faces backlash on transparency:** While there is growing support for tech in the pandemic, our data reveals **growing skepticism of social media** platforms; only a third (36%) say social media platforms are trustworthy while the majority of Americans (53%) say the information in their **social media news feeds is mostly misleading**.

- **Early signs of social media political delineation:** After Twitter labeled the Presidents' tweets with a fact check, we asked if people think social media platforms should or should not censor information they believe to be false/ misleading and (70%) of Democrats say that **social media companies should censor information** they believe to be false/ misleading, while only 57% of Republicans agreed.
- Scott Galloway [has a very interesting take](#) on how social media brands like Twitter and Facebook might start to align along political division.

Implication:

Hey tech don't blow this moment! Americans see technology as critical to solving C-19, fighting racism and being essential to our everyday lives—especially while sheltered at home. But the industry seems to be drawing lines on ethics between those relying on advertising revenue vs. subscription; the latter being more ethical because they don't have to monetize rage and division for profits. Why can't everything have a paywall?

Section:

# 05

Topic:

## THE TELEHEALTH REVOLUTION IS HERE

Introduction:

Although states have begun to lift stay-at-home restrictions, Americans remain cautious and seek to minimize unnecessary social contact. Before the coronavirus pandemic, Americans were slow to pick up on the telehealth trend. Yet according to analysts at [Forrester](#), social distancing measures at doctor's offices and hospitals could push virtual care visits to the 1 billion mark by the end of 2020. In an effort to dive deeper and understand the future of healthcare, The Harris Poll has tracked the significant rise in demand for telehealth services across different applications and demographics.

- After the first six weeks of lockdown, only 32% of Americans **had used telehealth services**; less than a month later, we see a significant jump in demand to 44%. And among those users 70% claim they used it for the first time during the pandemic.
- Since the end of April, new users of telehealth have increased from 15% to 27% and is consistent across demographic groups. Usage is also up among men from 37% to 50%. Additionally, younger adults are still more likely to have used telehealth than older people yet there is a notable increase in usage among Americans 65+ during this time frame from 18% to 28%.

- Over half of Americans are still **reluctant to engage in a traditional health care setting** (for non-emergency visits) unless specific conditions are met and nearly two in ten (18%) say they **wouldn't go to a doctor's office for elective healthcare** under any circumstances. As such, it's no surprise that **telehealth utilization rates are increasing not only overall, but also in frequency of use**. And since the pandemic began, nearly four in ten (37%) have used telehealth services **three or more times**.
- Overall, telehealth continues to be used for a **diverse set of applications** including mental health services, diagnostic visits (for non-C-19 and C-19-related conditions), nutritional consultations and physical/occupational therapy sessions. There has been an increase in **ongoing management of existing chronic conditions** and remote monitoring of chronic health, as well as a particularly notable uptick among those in the 65+ age group for using telehealth for ongoing management. (Wave 1: 58% vs. 64% in Wave 2).

Implication:

As in our initial wave, nearly eight in ten (79%) of those who have used telehealth indicate that they are likely to continue doing so after the pandemic subsides - with 40% of users say, "very likely". While the data is positive across many aspects of telehealth services, there is one variable that emerges as a key driver of Americans' willingness to keep using telehealth services – and that is that it's simply effective. When examining the data via regression analysis, the fact that telehealth is able to 'effectively address my health concerns' carries twice the impact of most of the other items evaluated. In response to this demand, politicians and business leaders need to jointly decide on the future policies regarding technology and reimbursement for telehealth services, particularly among employer-based plans.

[Read More](#)



# WAVE 14

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## WAVE 14 INTRODUCTION

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The following research was conducted between **June 6-8, 2020** by The Harris Poll. Fielded among a nationally representative sample of **1,969** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

Topic:

## THE GREAT RESET

Introduction:

As reported by the New York Times' [Dealbook](#) yesterday, The Harris Poll and [JUST Capital](#) found that many Americans are demanding a fundamental shift in our economic system post-COVID:

DealBook / Business & Policy  
DEALBOOK NEWSLETTER

*Respond, Reopen, Reset*



A protest at an Amazon facility in Hawthorne, Calif. last month. Valerie Macon/Agence France-Presse — Getty Images

June 9, 2020



Want this in your inbox each morning? [Sign up here.](#)

### Things won't be the same

DealBook is the first to report on a new poll of Americans' economic priorities after the pandemic. [The survey by Just Capital](#), a nonprofit research group that tracks companies' social impact, and The Harris Poll found that few people are looking forward to a return to business as usual.

**Just 25 percent of those surveyed think capitalism as it stands is good for society.** By contrast, a large majority thinks that the pandemic has exposed underlying structural problems and that big companies should "reset" their priorities.

- An overwhelming majority of Americans (89%) believe this pandemic has exposed **underlying structural problems** and big business must "**reset**" their priorities. A quarter (25%) of Americans go as far as to argue that **capitalism is no longer good for society**.
- Three-quarters (76%) of Americans claimed they would **remember the missteps businesses made during the pandemic** "long after it is over." Already consumers are shifting their demand: Amazon was forced to spend an additional **\$4 billion** on its COVID-19 response as it **lost 8 points of market share** in April according to Rakuten Intelligence. Main Street to Wall Street: We have long memories: 80% of Americans say they will **remember the companies that "did the right thing by their workers."**
- **This is part of a growing broad based movement for inclusivity:** As [our data showed last week](#), the coronavirus pandemic has exacerbated racial inequality and this week we saw **broad support for black people, the recognition of systemic racism and need for change:** more than three quarters of Americans (77%) believe there is systematic racism in America with nearly 9 in 10 (88%) of Americans saying **racial equality will be an important issue to them personally moving forward** - up from 77% just three weeks ago (May 22).
- **Young people are leading the charge:** Gen Z/Millennials and Gen X are more likely than Boomers and Seniors to believe there is systematic racism in America (82% and 81% vs. 73% and 68%, respectively) and while racial equality is an equally important issue across generations (86% Gen Z/ Millennial; 90% Gen X; 87% Boomers; 89% Seniors). Also, **younger Americans have more conviction to fight racial injustice:** 70% of Gen Z/Millennials and 64% of Gen X say racial equality will be very important moving forward vs. 59% of Boomers, 53% of Seniors.
- **Companies have a role to play in the movement for racial equality:** A majority of Americans (57%) say **companies should provide a public statement** on the Black Lives Matter movement and racial inequality in America. And half of Americans (53%) say their place of employment **has made meaningful efforts to acknowledge and address racial inequality**. Is it enough? A near equal number (one percentage point difference) of Americans worry if the protests will go on indefinitely, or if they will dissipate and lose the ground seemingly gained over the past two weeks.

Section:

# 01

- **Read more:** Is America leaning in this time? Historic Oakland black book store [sells out of books on racial discrimination](#).
- **Read more:** 180 CEOs from the [Business Roundtable](#) pledged to **prioritize the needs of all stakeholders** - employees, vendors, the environment, and their communities. Although others like [The Economist](#), disagree, saying it is clear that capitalism needs to be reworked.
- [What shape will the recovery take?](#) U-shape, checkmark, square root symbol, and swoosh are all on the table, say economists.

## Implication:

The public has demanded big business change to better meet society needs. And encouragingly, Corporate America has been seen as part of the solution to this crisis. The widespread lift in corporate reputation we see in our Harris data reinforces the opportunity for business to lead social change.

[Read More](#)

Section:

# 02

Topic:

## IMPACT OF THE CARES ACT

Introduction:

As the money from the CARES Act and the Paycheck Protection Program (PPP) dries up, lawmakers are now arguing over the limitations of extending deadlines and plugging gaps in an unprepared system while simultaneously promoting their re-election campaigns. Rather than track the political horse race, The Harris Poll and TriNet - a comprehensive HR solutions provider - partnered to understand the extent of the impact for those who matter most - **America's small businesses.**

After initial confusion on how these programs worked, small business owners began to apply for funding. By April 6th, 4 in 10 had tried to apply for funding; however, 1 in 5 of those were unable to complete the process, and **6 in 10 feel that the loans are 'difficult to access.'** This sentiment has been reflected in the operational changes:

- 46% have reduced employee hours
- 40% of business leaders have taken a lower salary for themselves
- 34% have reduced marketing/advertising spend
- 32% have worked with creditors to reduce obligations
- 29% have cancelled services
- 26% have laid off employees
- 19% have reduced inventory
- 13% have furloughed employees

Although these changes will likely have long-term negative impacts for the US economy, (78%) of small business owners are making strategic investments:



INVESTING IN INFRASTRUCTURE

**46%**

Increased infrastructure to be more virtual, online, or contact-less.



INVESTING IN EMPLOYEES

**37%**

Are continuing to offer health insurance benefits to laid off or furloughed employees

**37%**

Are offering pay to employees who are not currently working



INVESTING IN CUSTOMERS AND COMMUNITY

**37%**

Are donating to or sponsoring local causes for COVID-19 relief (15% are donating to national relief)

**36%**

Are offering assistance to customers (such as free services, discounts, delayed/forgiven payments, waiving fees, etc.)

**14%**

increased marketing or advertising spend.

Implication:

Politicians in Washington need to take a page out of a Marketing 101 textbook and develop clear customer education. Small business owners are understandably confused and worried about the future of their business, and more importantly their livelihood.

[Read More](#)

Section:

# 03

Topic:

## CARS ARE THE NEW PLANES

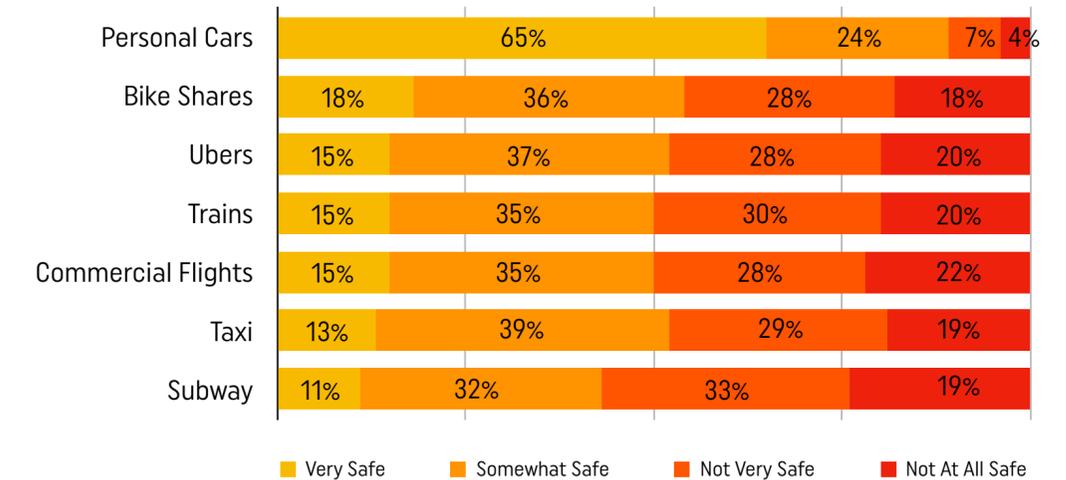
Introduction:

Americans miss gathering with close family/friends and are eager to reconnect through in-person events as restrictions begin to lift, but how will they get there? Personal vehicles will be the choice for movement in a post-COVID world, as they are overwhelmingly seen as the safest means of transportation now and in the future.

**The majority of Americans (65%) consider visits to see close family members as essential travel**, while over half (53%) feel the same about travel for weddings, graduations, etc. of immediate family and close friends, and (46%) consider visits to see close friends essential.

- Almost one in five Americans (18%) say they are in the market for a new car once restrictions lift, up from 11% in March.
- But 65% say they'll substitute vacation travel and 67% short distance business travel with driving (although this is down 8 and 12 points, respectively, from last week).
- Cars are overwhelmingly viewed as the safest means of transportation right now with 90% of Americans viewing them as very safe or somewhat safe, they are also anticipated to be the **safest 3 months from now by a wide margin (89%)**.

Perceptions of Safety — 3 Months From Now



Implication:

Our Harris data shows Americans moving to facts, science, and straight talk. From the CDC, to hospitals, healthcare, Governors, and other authorities, there is a renewed respect for institutions and authorities. But with that comes trust. Will Twitter 'pivot' from Facebook? Or will social media stick to the same playbook of turning a blind eye to deception and division? With three crises and an election on the horizon, that's a pretty big gamble indeed.

[Read More](#)

Section:

# 04

**Topic:**

## SMB GOVERNMENT SUPPORT AND WORKFORCE IMPACTS

**Introduction:**

While SMB resiliency has remained strong, confidence in government support is an area that has waxed and waned throughout the pandemic. The Harris Poll TriNet survey also set about to monitor the level of support SMBs felt they were getting from the government over the past couple of months as well as the impact the pandemic has had on SMBs' workforce.

- **Is the government doing enough to support SMBs?** In early April, over half (58%) initially said yes. Since then, this sentiment has been very volatile, dropping to a low between April 28 - May 1 (38%), and then rising to (46%) between May 5-8.
- As of early May, six in ten SMB leaders (60%) have reduced their workforce in some way including reducing employee hours (47%), furloughing employees (26%), or laying off employees (22%).
- **How else are businesses adapting?** As of early May, over half (57%) of SMB leaders have made one or more of the following types of changes to their business: shifted business model to be more online/virtual (40%), changed product/service offering to address pandemic (20%), changed product/service offering to keep revenue coming in (18%).

**Implication:**

SMBs are continuing to prove quite resilient and nimble throughout this time, despite the blow that the pandemic had dealt them. As things begin to open up, it will become apparent whether or not the level of government support and measures SMBs have taken will have been enough to get them through these troubled times.

[Read More](#)

Section:

# 05

Topic:

## EMPLOYEE INVESTMENT

Introduction:

As we have seen, the pandemic has had a hefty impact on the SMB workforce. Not only does this include workforce reductions, but also how they are supporting their workers from investing in the health of their employees (58%) and making shifts to a remote workforce (92%). The Harris Poll TriNet survey found:

- 82% of SMBs take concrete actions to enhance employee well-being, with **the single most effective action being increasing flexibility to balance work/home life (44%)**, followed by virtual gatherings (10%) and increased visibility of leadership/management team (10%).
- Overall, 74% of SMBs say that most or all of their employees have taken advantage of the new employee well-being offerings. In fact, more than half (57%) of SMB leaders say **their workforce remains optimistic** in light of the current circumstances.
- The majority of SMB leaders (62%) indicated a downtick in productivity. However, when identifying the single greatest challenge in workforce management during the pandemic, lower employee productivity ranked third on the list for SMBs (12%).

What would you say is the single biggest challenge to managing your workforce during the pandemic?



Implication:

What will be the impact of this change in behavior? The current state of the remote workplace has SMB leaders planning for the future once the pandemic subsides. Fifteen percent of SMBs expect that all of their employees will remain working remotely, 52% of those for whom remote working is a possibility expect that some will remain remote, and 33% say none of their employees will stay working remotely when the crisis is over.

[Read More](#)



# WAVE 13

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## WAVE 13 INTRODUCTION

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The following research was conducted between **May 29–31, 2020** by The Harris Poll on the coronavirus outbreak. Fielded among a nationally representative sample of **1,965** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

Topic:

## AMERICA ADDS A THIRD CRISIS

Introduction:

As rioting engulfed Ferguson, MO on August 10, 2014, the day after the fatal shooting of Michael Brown by police, Americans 'got it', but only kind of. [In a Harris Poll](#) which explored changes – and lack thereof – in perceived discrimination toward African Americans in the U.S., 59% of all citizens said the Black Community is discriminated against [in the way they are treated by police](#). This, compared to 85% of Black citizens versus 55% of White citizens. The gulf was even wider between Republicans (39%) and Democrats (77%). And yet, this represented more than a twofold increase among the general population (up 34 points) and nearly a threefold increase among whites (up 36 points).

Fast-forward to 2020 that has been overwhelmingly disastrous for people of color. **The coronavirus crisis has disproportionately affected black** and Latino Americans, who became sick and died of COVID-19 at higher rates than whites and they [lost more jobs](#). But where does this leave us with last week's crisis? Now we have **health, economic, and social dislocation back at the forefront**. And [could protests set off a second viral wave?](#)

- **Fear of the virus itself is fading:** Fear of dying from COVID-19 peaked at 56% on April 3rd and has since gone down and has evened out at just below half (49%). Over the weekend we saw the fear of returning to normal activity drop five percentage points from 74% to 69%.
- Meanwhile, **economic inequality has hit new homes;** the fear of global recession is up to three percentage points from 74% to 77% as inequality hits home for more Americans, 31% have lost income partially due to the pandemic.

- **Economic hardship worsens racial inequities:** 61% of African Americans and 62% of Hispanics are concerned they will lose their job due to the coronavirus outbreak vs. 50% of White Americans. And 47% of African-Americans have been seeking new sources of income vs. 31% of White Americans. And by a two-to-one margin, 39% of African Americans have missed/will soon miss bill payments vs. 20% of Whites.
- **COVID's stress on structural inequities:** Despite some describing C-19 as 'the great equalizer,' over 6 in 10 say the pandemic has exacerbated poverty (65%), job creation (64%), hunger (62%) and nearly a third say it has made racial inequality worse (30%). Polarizing emotions can have an alienating effect: Today, overall 40% of Americans feel lonely, especially Gen Z/Millennials (49%) vs. older generations (Gen X 41%, Boomers 34%, and Seniors 34%).
- Though a large majority of both Whites (76%) and African-Americans (85%) say racial equality is important, over three-fifths (63%) of African-Americans say racial equality is **very** important compared to only 41% of Whites.
- [NPR examines](#) how the COVID-19 crisis is making racial inequality worse.
- The vulnerability of African Americans to the coronavirus is a national emergency, according to [The Economist](#).

Implication:

Nearly 8 in 10 (77%) of Americans say **racial equality** will be an important issue to them personally moving forward. But these profound gaps require more than a national conversation. As America yearns to return back to 'normal,' these statistics remind us that systemic racism, indignity, and inequality are what's 'normal' for many Americans of color.

Section:

# 02

Topic:

## THE CLASS OF COVID-19

Introduction:

As schools like Notre Dame and others announce their opening this Fall, we asked American students what would make them feel safe to return to campus post C-19? What's interesting here is that **most students want the college experience replicated**, meaning social participation whether in classes, dorms, or movement around campus is a priority:

- While older Americans portray Gen Z to be reckless and ambivalent about public health, as [our data from May 15](#) found that three quarters (75%) say young people act as if social distancing restrictions don't apply to them, **students here seem prudent** in their desire for safety: those in college or applying say they want a guarantee of hygienic cleaning of shared spaces (53%); mandatory testing or vaccine for all staff and students (49%); mandatory face masks for all staff/students (46%); and limited capacity at school events (45%). After schools [reopened in Israel](#), several schools were again quickly closed following outbreaks of students and staff.
- As Inside Higher Ed [says](#): It's not so much when colleges reopen - it's also how they reopen. And Axios [takes a closer look at how colleges can reopen](#). [Pittsburgh Post-Gazette](#) goes behind-the-scenes to the decision making that went into one local college's decision to reopen in the fall.
- [WSJ](#) dives into the ramifications of **fewer students applying for college financial aid**: "The decline is troubling to colleges and high-school counselors because it indicates some teens may have erased college entirely from their fall plans, assuming it is out of reach during the health and resultant economic crisis."

- **The public stands with colleges and universities suspending SAT/ACT test requirements from college applications**: Over 8 in 10 (82%) American students currently enrolled or applying to college and 66% of gen pop **support colleges and universities suspending SAT/ACT test requirements** for undergraduate applicants through at least 2024. **Calling into question the efficacy of standardized tests**: 6 in 10 Americans are skeptical (36% say they are not a fair assessment of a college applicant's aptitude and knowledge and 24% are not at all sure).
- **Is it time to say goodbye to the SAT/ACT for good? Maybe**: More than half of American students currently enrolled or applying to college (55%) **believe SAT/ACT test scores should be permanently suspended**, including 2 in 5 parents (41%). But Americans overall are more split, 38% of gen pop believe SAT/ACT test scores should be permanently suspended from college applications, 32% say they shouldn't and 27% are not at all sure.
- **The future of college applications might include custom entrance exams**: 7 in 10 American students who are either enrolled or applying to college and 58% of all Americans think **colleges and universities should create their own entrance exams** that are **customized to the university's expectations** of applicants' knowledge and align with university values.
- The Washington Post [states](#), "**The testing giants are reeling at a time** when scores of colleges and universities have said they will not require an SAT or ACT score for students applying to enter in Fall 2021 because of the COVID-19 pandemic — and the influential University of California system just decided to start to phase out their use."

Implication:

There have long been cries of bias in standardized survey tests that a pandemic accelerated and Black Lives Matter movement will likely topple. Universities need students on campuses to keep their business models afloat. This might be the gap year of all gap years.

[Read More](#)

Section:

# 03

Topic:

## THE MISINFORMATION PANDEMIC

Introduction:

It is hard not to imagine both the C-19 pandemic and racial protests through the lens of social media. At a time of historic social and political unrest, social media faces its existential question of what it means to keep us informed and connected. [FiveThirtyEight](#) asks, “how bad is the COVID-19 misinformation epidemic?” And [The New York Times](#) looks into a surge in misinformation around George Floyd on social media. And in our new Harris data we see deepening division:

- **Americans are divided on what is being posted on their feeds:** Just over half (53%) say people on their feeds are mostly posting misleading information, while 47% say they are mostly posting facts.
- After Twitter posted a warning label on a Tweet from President Trump claiming it was misleading about vote-by-mail, the President [signed an executive order](#) “to curtail the legal protections that shield social media companies from liability for what gets posted on their platforms.”
- While Twitter intervened to inform its users of what they deem to be misleading information, **Facebook will remain neutral:** [according to Zuckerberg](#), “We’ve been pretty clear on our policy that we think that it wouldn’t be right for us to do fact checks for politicians.” In response, its employees are staging [virtual walk-outs](#).

- Support is high (75%) for social media platforms to monitor whether what is said on its platform is true or false.
- And two-thirds (64%) say **social media companies should censor false or misleading information**. Despite the president’s executive order, more than half (57%) of Republicans support censorship; though less than 7 in 10 (70%) of Democrats.
- [Fast Company](#) looks into the coming collision between C-19 misinformation on social media with the November election.

Implication:

Our Harris data shows Americans moving to facts, science, and straight talk. From the CDC, to hospitals, healthcare, Governors, and other authorities, there is a renewed respect for institutions and authorities. But with that comes trust. Will Twitter ‘pivot’ from Facebook? Or will social media stick to the same playbook of turning a blind eye to deception and division? With three crises and an election on the horizon, that’s a pretty big gamble indeed.

[Read More](#)



# WAVE 12

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## WAVE 12 INTRODUCTION

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The following research was conducted between **May 20-22, 2020** by The Harris Poll on the coronavirus outbreak. Fielded among a nationally representative sample of **2,032** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

Topic:

## THE SUMMER OF OUR DISCONTENT

Introduction:

Memorial Day weekend signifies the beginning of summer. And with it, an unleashing of pent up demand—be it [lines outside luxury stores in China](#) or throngs of people drinking White Claw at non-CDC endorsed pool parties in the Ozarks. **Mask usage is declining** in certain states, despite Harvard Public Health Institute warning that up to 70,000 deaths could still occur this year. We are at a critical moment as fear gives way to desire. But will America manage its coming out party responsibly?

- **Summer comes in like a lamb...** [Our Harris Poll featured on the CBS EVENING NEWS](#) found that 95% of Americans chose to stay home because of the pandemic. Given this, [AAA did not issue a travel forecast](#) this past holiday weekend. Our data also shows that in the next three months only a small percentage of Americans will fly on a plane (31%), stay in hotels (40%), attend a sporting event (37%) or take a cruise (28%).



- **...But out like a lion?** Americans miss dining out at restaurants and bars (71%), shopping in stores (66%), attending concerts, theatre and sporting events (50%), hitting their local coffee shop (48%) and going out to the movies (46%). Meanwhile, data from OpenTable shows diners are beginning to return in several states. However, [new data also shows](#) that **one-fourth of all restaurants won't reopen**.
- **Pent up demand (extreme edition):** Is your stadium shuttered? No problem, [you can rent your field of dreams](#) on Airbnb.

Implication:

America's consumerism (which drives 70% of GDP) is about to go on a tear. With 64% saying their income is the same or will even rise this year, there is plenty of economic impetus to overcome our loneliness (46%), claustrophobia (31%), and stress trying to balance it all (32%). Like Shakespeare's play, will our collective attempt to regain our status and wealth be our own undoing? We predict fear will abate and desire will win over the long, hot Summer. How will corporate responsibility evolve to serve the public's health and its demand? Ask us in August.

Section:

# 02

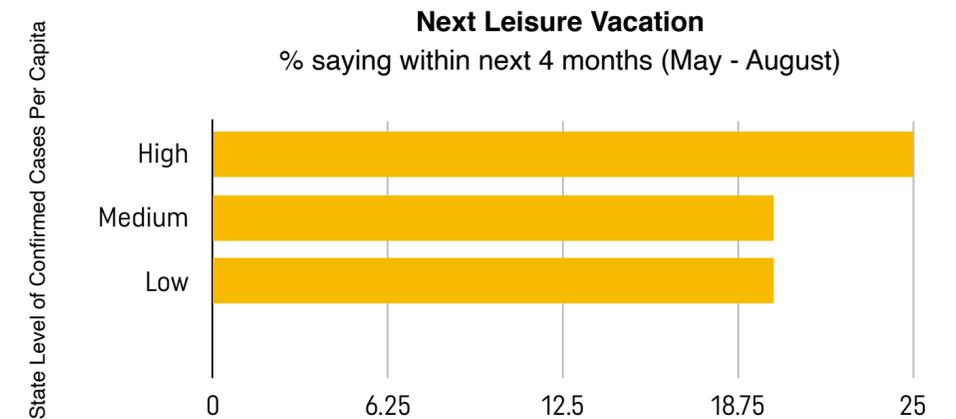
Topic:

## A BATTLEGROUND INDUSTRY: TRAVEL & LEISURE

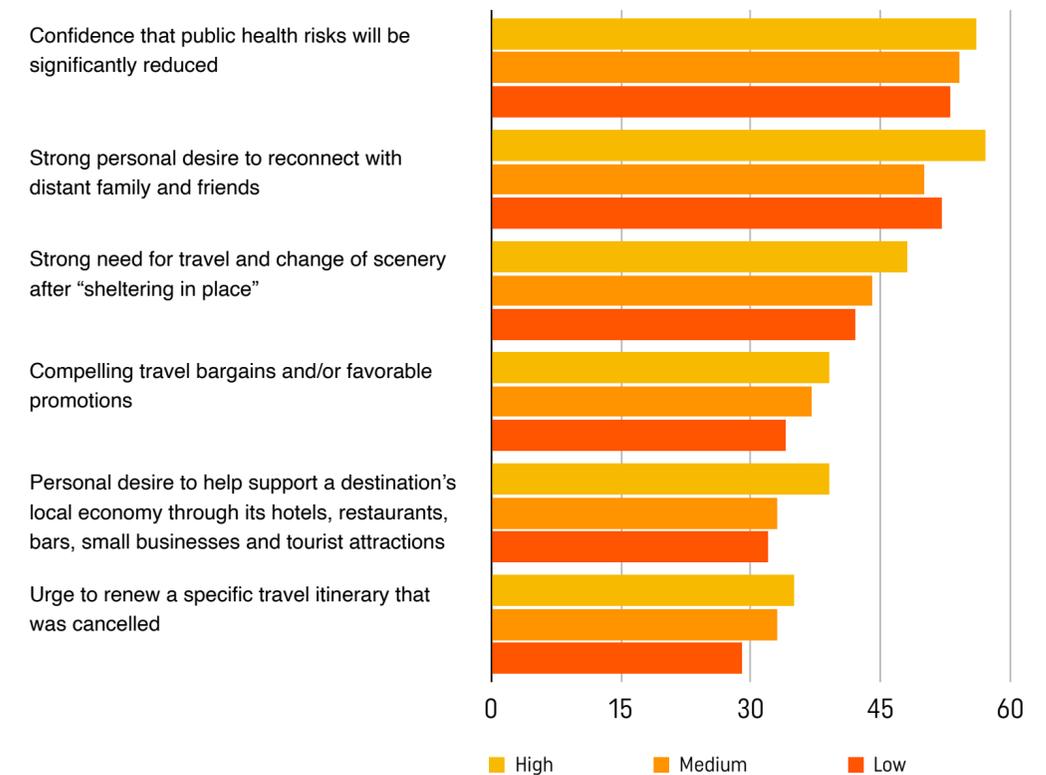
Introduction:

As we've tracked for nearly twelve weeks, America is locked in a **battle between fear and desire**. Let's take one industry and debate an optimist's (and a cynic's) viewpoint:

- **The argument for revenge travel is real:** As sheltering in place orders have extended, pent up demand for major purchases, such as vacations and traveling, have only been increasing over time, 24% were planning a vacation once things return to normal on March 30; which bumped up to 29% on May 17. The FT reports there is a [race to book vacations](#) in reopened states.
- And while the number of travelers passing through TSA checkpoints fell to 87,534 on April 14, 96% below the same day one year earlier. But by May 24, **the figure had more than tripled** to 267,451, although that is still down (87%) from the same day a year earlier.
- This trend is even further compounded by the severity of the C-19 outbreak: **Residents of states with the highest level of confirmed cases** per capita are the most likely to travel within the next 4 months (25% vs. 20% in the medium and low states). They have a strong need to connect with family and friends (57%), get a change of scenery (48%) as well as the desire to support a destination's local economy (39%). These individuals are most comfortable with the prospect of traveling domestically (60%), renting a car (53%), and staying in a hotel (50%) more so than flying (36%) or taking Uber/Lyft/cab (37%).



Factors Impacting Leisure Travel in 2020  
By State Level of Confirmed Cases Per Capita



Section:

# 02

- **Pressure to avoid non-essential travel** from family and friends could derail their plans (26% say it might alter or block their 2020 leisure travel) even more so than those in less impacted states (20% among low or medium states).
- Consider these tensions: The [NY Auto show has been cancelled](#) as our data shows that over 50% of respondents say they **don't feel safe using any transportation that isn't their own car**. But that doesn't mean we won't spend on cars: 17% of Americans say buying a new car is a major purchase they are planning for once things return to normal. And over half (54%) plan to purchase a vehicle in the next six months or at least sooner than they expected. See our [special automotive report here](#).

## Implication:

The longer and more severe the impact of C-19, the greater the demand to get back to normal activities, such as travel. We see travel as the battleground between fear and desire in America. Watch for travel to be a key indicator that Americans think normal life resumes in earnest.

Want to read the cynic's viewpoint? [Read More](#)

Section:

# 03

Topic:

## WILL SOCIAL ISSUES TAKE A BACK SEAT TO C-19?

Introduction:

It was January and we were talking about Harvey Weinstein, carbon credits and income inequality. The Business Roundtable had just redefined the purpose of a corporation to promote '[An Economy That Serves All Americans](#)'. Now we wonder in the age of C-19, would these issues still matter to Americans?

- **C-19 has exacerbated society's most devastating inequalities:** Many have described the pandemic as the "great equalizer," including well respected leaders like [Governor Cuomo](#) (and even [Madonna from her luxury bathtub](#)) but as every day goes by, it becomes clearer the virus isn't an equalizer at all, [as Vox recently reported](#). In fact in our latest poll found majorities of Americans say C-19 has exacerbated Poverty (65%), Job Creation (64%), Hunger (62%), Education (60%) and Domestic Violence (55%).
- **Reinforced urgency on issues core to thriving livelihoods:** We asked Americans what issues will be more important to them, personally, moving forward after C-19 and overwhelming majorities said access to healthcare (91%), good health and well-being (91%), education (85%), job creation (85%), hunger (84%), poverty (82%), gun violence (77%), and domestic violence (76%). As a result, [philanthropy is being called upon to redefine efforts around urgency](#) and even the [head of the United Nations Economic and Social Council \(ECOSOC\) proposed plans to further postpone or cancel all UN ECOSOC meetings](#) in the coming eight weeks.

- **Will corporate America keep its promise?** In the new [FORTUNE 500 Survey](#), CEO's were asked if they agree with the BRT's new statement and 63% said 'I agree and believe **most good companies have always operated that way**. Nothing changed.' However 25% said 'I agree, and I believe it represents a **significant change in corporate thinking** from a decade or two ago. And 50% of CEO's said it will '**accelerate the move toward stakeholder capitalism** in order to **address the human suffering caused by the crisis**,' whereas 18% said it will 'slow the move... as companies focus on shoring up their bottom lines.' The public will be watching, nearly 8 in 10 (78%) say taking action for the greater social good is very important for corporate America today.
- **There's also a 'full-blown she-cession':** 69% of women feel the economic impacts of the coronavirus pandemic will have a bigger effect on their lives than the virus itself (vs. 63% of men), a third (33%) have lost income partially and 29% have stopped or cut back on savings. NBC reports how [C-19 is economically hurting women, minorities the most](#): Women accounted for 55% of the 20.5 million jobs lost in April, with especially high unemployment rates for those ages 20–24 and over 50, as well as for women of color. And women are heavily represented in industries hardest hit by the virus, including travel, restaurants, and childcare, and they make up more than 60% of low-wage workers. We see the **aftershocks** of this in our data as a third of women (33%) are **seeking new or additional sources of income** and nearly 9 in 10 women (86%) say job creation and poverty (85%) will be important to them personally moving forward (vs. 84% and 78% of men, respectively).
- **The environment was spared by default as the nation halted movement:** Nearly 4 in 10 (37%) say C-19 has improved climate change and over a third (35%) say it has improved environmental efforts. We've all seen the photos of blue skies in LA and Delhi. But the biggest percentage drop in co2 emissions has come from the aviation industry, with a 60% decline, or 1.7 million metric tons and from surface transportation (vehicles, trucks and domestic and international shipping) which fell by 36%, or 7.5 million metric tons. And let's be honest, **the restrictions on mobility that shrunk our personal carbon footprint can't be sustained long-term**. McGill University associate professor and epidemiologist Jill Baumgartner warned in an interview with [The New York Times](#), "**This really shouldn't be seen as a silver lining**."

Section:

# 03

- And given social **distancing until 2022 may be necessary**, [according to Harvard coronavirus researchers](#), may explain why Americans are throwing data privacy caution to the wind to ensure safe distance: 71% support **remote AI patient monitoring** to allow healthcare professionals to **maintain social distance**.
- Ultimately, will we live out the message in this photo? This [hotel uses empty rooms](#) to illuminate messages of hope for commuters.



## Implication:

Many leaders we've spoken with privately in the c-level marketing and communications ranks worry that companies in pursuit of recovery will give back ground that was won on diversity, inclusion and climate awareness. Great leaders will connect the pandemic to our shared national vulnerability and need to rely on one another again if C-19 returns en masse.

[Read More](#)

Section:

# 04

Topic:

# RACE, INCOME AND REOPENING

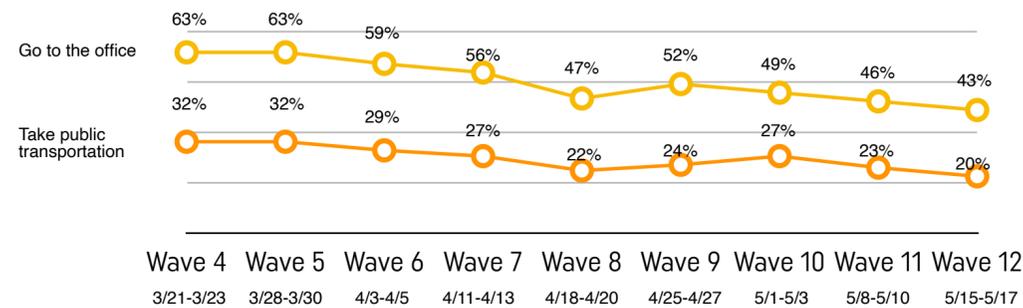
Introduction:

If you were worried about social issues in the previous story, here's one playing out in real time: While everyone wants the economy to reopen and people to get back to work, there's a **large gap between what Americans believe is safe and what they can afford.**

- In [data we reported with the NY Post](#), more than half of Americans don't feel safe getting around in anything other than their own vehicle during the coronavirus pandemic. We found 79% don't consider subways safe; 72% said that of airplanes, 70% of taxis and 65% of ridesharing services. Even 58% feel ride sharing bikes aren't safe. By comparison, 91% felt it was safe or somewhat safe to take a car.
- But there are economic disparities in affording a car, because while 43% said they would go back to work within thirty days, only 20% said they would take public transportation.

**Why Cars? Those Willing to Return to the Office and Transit Within One Month Has Steadily Declined, But Public Transportation is Still a 'Safety Breakdown' to 80% of Commuters**

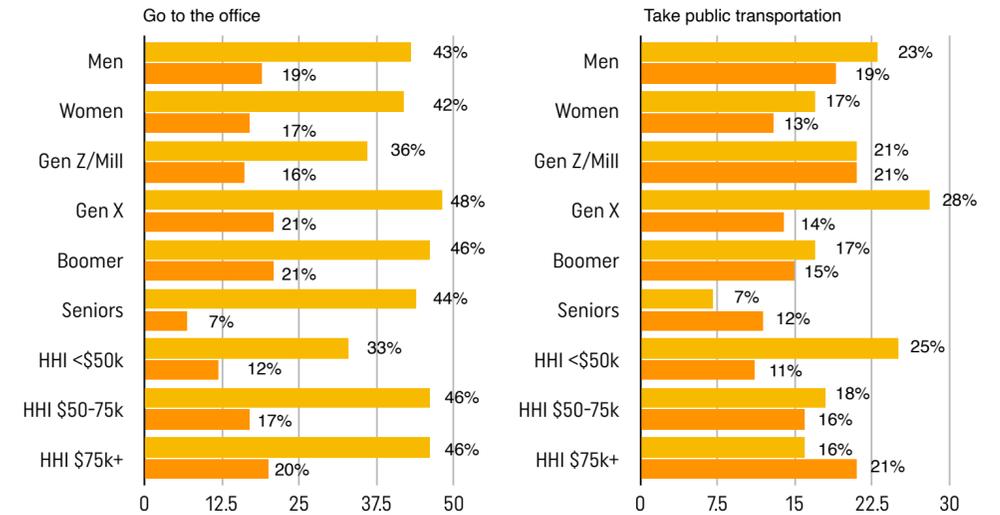
Once the government provides information that the spread of the virus is flattening, how long will it take you to... % Within 30 Days



- Then consider that among those who are most likely to take public transportation (against their fear of doing so) are Americans with HHI of \$50K, people of color, and younger people who have been hit disproportionately in terms of losing jobs and income.

**Older Americans Most Likely to Return to Office First; Lower Income Will Be First Back on the Subway**

Once the government provides information that the spread of the virus is flattening, how long will it take you to... **Within 30 Days 2 to 3 Months**



- Taken together, 43% of Americans want to return to work within 30 days but 80% say it's too dangerous to take public transportation. Yet one-in-ten Americans take public transportation daily or weekly (and people of color are three times as likely to do so).
- Soon you might see this on your commute: [A Chicago artist fills pesky potholes with pandemic art.](#)

Implication:

We often bifurcate social issues from economic ones. However, here you can clearly see a blockage in reopening the economy that is based on color, income and equal access to a safe workplace. Testing, contact tracing and on-site thermal testing are all means to alleviate fear for employees. But if most workers are afraid to work, the recovery will be slower.

## Section:

# 05

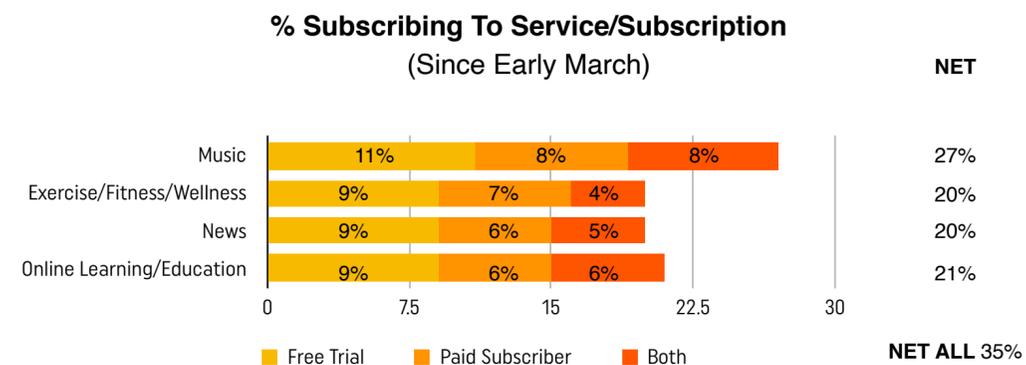
### Topic:

## SIGN ME UP

### Introduction:

The news is filled with data points about the pandemic-related rise of streaming services in America. But what about other services? Are Americans also streaming more music? More self-improvement services? What about online learning or news options? And, importantly for these companies, do these new users plan to keep the services long term?

- During March/April 2020, 35% of Americans accessed a free trial or activated a new subscription for music, news, fitness, or online learning service.
- Do these new subscribers plan to stick around as the crisis abates? **Music seems sticky:** Music subscribers are the most likely to say that they plan to keep the subscription post-pandemic (72%). Nearly two-thirds (64%) plan to keep their new fitness service subscription. Over half plan to keep news or online learning services.
- However, **some accessed the services solely as a stopgap.** One-third of new online learning or news subscribers and one in five new fitness service subscribers say they do not plan to keep the service/access to content after the pandemic.



### Implication:

Yes, we've gone app happy in part because there's little in the physical world to buy. The challenge for subscription services is two-fold – providing an experience that new subscribers expect and value, while demonstrating benefits to those who are either on the fence or don't plan to need/want the service in the future. Both of these jobs may be made more difficult by the increasing financial pressure many Americans are facing. As such, optimizing the user experience during the critical 'trial' period amounts to 'shock and awe'.

[Read More](#)

Section:

# 06

Topic:

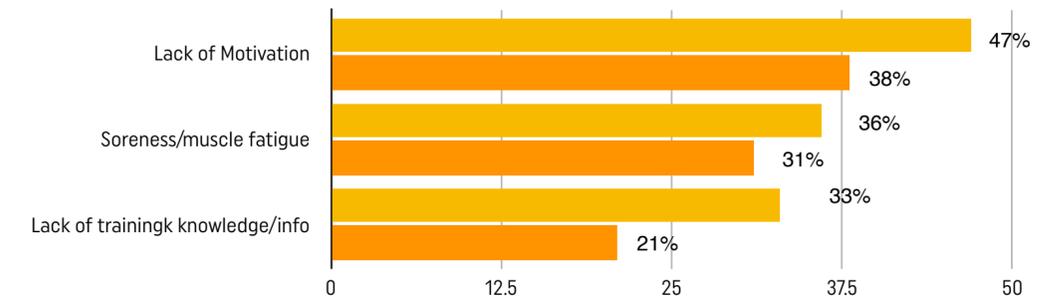
## AMERICA ON THE RUN

Introduction:

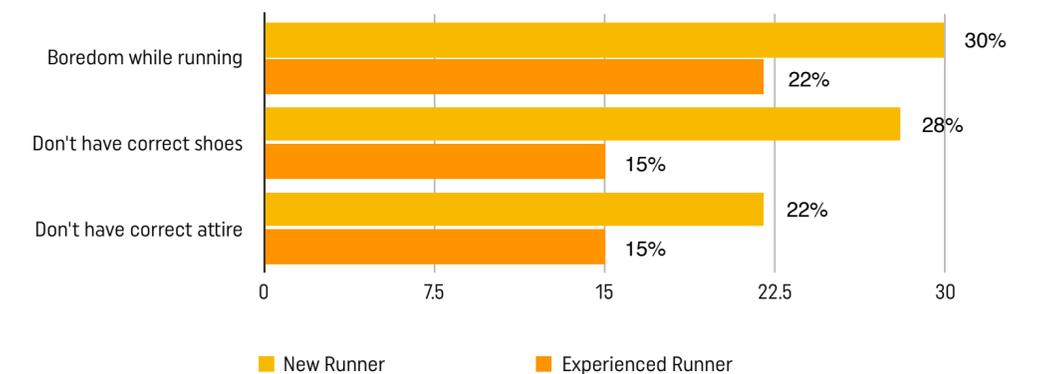
Nearly one-in-five (17%) Americans count themselves as one of the ‘new’ runners in the 2020 C-19-driven running boom. Most of them are looking for both physical and mental benefits from their new running habit. They want to improve physical health, sure, but they are also looking for ways to relieve anxiety/stress and to take their mind off the pandemic. And like body-weight exercises, running is something you can do without fancy equipment found at your (closed) gym:

- These **new runners are a mix of Gen Z, Millennials and Gen Xers**, a large percentage are parents, and many are affluent (20% of those with HHI over \$100K are part of this new runner cohort). In fact, **nearly half (47%) of all ‘runners’ classify themselves as ‘new’ vs. ‘experienced’**.
- New runners are **struggling with staying motivated (47%)**, battling muscle fatigue and soreness (36%), and lack training knowledge and information (33%).
- Despite these challenges, most **new runners are committed to running in the long term**. 42% of new runners are feeling excited to keep running, while 49% are feeling challenged.

Top 3 Challenges Among New Runners:



New Runners Are Also More Challenged by the Following Than Experienced Runners:



Implication:

These are gaps that fitness brands are well-poised to address, offering an opportunity to capture this new audience of potential customers. Americans are willing to spend more on the things they want during the pandemic – and a large portion of these runners have disposable income. In fact, 1-in-5 new runners who make \$100K+ say they don't have appropriate shoes.

[Read More](#)

Section:

# 07

Topic:

## TIP LIKE THERE'S NO TOMORROW

Introduction:

We anxiously await our favorite dining spots to open back up. [In our Harris survey](#) we found Americans' fear of losing their local mainstays and support price increases to keep them in business:

- Americans are **overwhelmingly (78%) concerned about local restaurants going out of business** and it shows: 66% support restaurants increasing prices to help recover losses as a result of the pandemic.
- Most encouragingly, nearly a third are willing to pay (8%) surcharge to their tab and say it should apply to food and alcohol: Nearly three-quarters (72%) are willing to pay a surcharge of at least 1% of their total bill, and 27% would be willing to pay as high as 8%. And a majority (54%) say the surcharge should apply to both food and alcohol.
- What is the appropriate way for restaurants to raise prices? 41% say notification before ordering that all menu items have increased in price, with 25% suggesting an optional surcharge on the bill and 24% encouraging higher than normal tips.

Implication:

A bottle of red, a bottle of white.... 71% of Americans say they miss dining out and it shows in their desire to see their favorite spots reopen. This data reminds us of Panera's experiment to pay what you can. Here, perhaps, credit card issuers could assign a line on the restaurant tab asking for a restaurant reopening tip on a sliding percentage of 1 to 10%. This would be not unlike a resort fee or state tax. Restaurants should capitalize on our collective goodwill and our cabin fever.

[Read More](#)

Section:

# 08

Topic:

## VIRTUAL OR IRL?

Introduction:

A lot has been made of trying to understand whether pandemic behaviors and routines will become lasting. To understand this more clearly, this weekend we asked Americans to consider some of their favorite activities and **whether they'd do the online or in-person.**

- **Retail IRL:** Americans are **twice more likely to shop in-store for household products** (69%) vs. shop online for household products (31%) post C-19. Also, more than three-quarters of Americans (76%) say they are more likely to shop for groceries in-store while 24% are more likely to order groceries online for delivery. Hard to see green from yellow bananas through the www.
- **No more doomsday bulk shopping:** Americans are **twice as likely to buy only what they need** (64%) vs. buying in bulk (36%) post C-19. Here we posit that cupboards are overflowing and there's no more freezer room left for the ice cream.
- **Some are holding out for traditional date night and happy hours:** More than 2 in 5 (43%) are more likely to dine in a restaurant post C-19, especially men (47% vs 39% women) and more than 2 in 5 Americans (41%) are more likely to do happy hour at bars/restaurants.

Implication:

Rapid distress purchased tech like Instacart, Peloton and Zoom promise to capture long term share, as will bricks and mortar for online ordering and pick-up. But as you can see here when things are more intimate and involved, be it a closing date, a business deal, or sniffing the basil, IRL is A-OK. Your physical presence is relevant in so far as you are an emotional brand or providing an essential, tactile experience.



# WAVE 11

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## WAVE 11 INTRODUCTION

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The following research was conducted between **May 15-17, 2020** by The Harris Poll on the coronavirus outbreak. Fielded among a nationally representative sample of **1,961** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

Topic:

## O.K. BOOMER WHERE'S YOUR FACE MASK?

Introduction:

Journalist [Dorothy Fuldheim](#) said, "This is a youth-oriented society, and the joke is on them because youth is a disease from which we all recover." As a kid growing up in Cleveland, I adored Dorothy because she was still on the job at 91 for WEWS and The Cleveland Press. She covered the Kent State shootings and interviewed both Hitler and Mussolini. Undoubtedly, she would have something to say about **the age warfare** emerging in our C-19 data:

- **Americans over 50 say the nation's youth are acting 'young and reckless' during C-19:** Three quarters (75%) say that young people act as if social distancing restrictions don't apply to them. Also, they lack concern for the pandemic (73%) and are acting recklessly and putting the rest of the nation's health at risk (72%). Hard to argue that after these photos over [Spring Break](#).
- **Yet younger Americans say older people are the most defiant and stubborn** by not taking their own vulnerability seriously: More than half of younger Americans age 18-49 (56%) say seniors are stubbornly sticking to their routines even though they are more at risk. A near equal number (53%) also say **seniors are less likely to abide social distancing** restrictions; a trend we first reported with [Forbes](#) in early March.

- **Both see each other as ignorant to their own risk:** More than half of younger Americans (54%) age 18-49 say older folks are ignorant to think they are not at risk of contracting the virus, while 54% say they are not taking necessary precautions to protect themselves and others. Meanwhile, 77% of those over 50 say it's the youth who are being ignorant by thinking they are less likely to spread C-19 than others. And almost three quarters (73%) say the nation's kids are being selfish by not taking necessary precautions to protect themselves and others.
- Yet a barbell risk model exists: [Young people dying from strokes](#) while [one-third of all C-19 deaths have occurred in nursing homes](#).
- What can they agree on? Overall, 63% of all Americans **say people are not taking the pandemic seriously** and 62% say **stricter enforcements should be made**. And 7 in 10 (71%) say the amount of fear is sensible given how serious the pandemic is.

Implication:

One thing all Americans can agree on is we just want this over with. Half (51%) of Americans have cabin fever and 50% say it's time to move on. But the generational clashes show shared ignorance in calculating risk. Each has to proceed cautiously or risk spreading C-19 whether in a bar or at Sunday brunch.

Section:

# 02

Topic:

## THE AMERICAN DREAM TEN YEARS AFTER

Introduction:

To try and put today's America in context with another time of crisis, we went back into the Harris Poll archives to our annual [American Dream study](#). In 2009, we asked a simple question: what are the top factors of The American Dream? And we asked that question again this past weekend.

- Some aspects of the **American Dream are unbreakable**: In August of 2009, The Harris Poll asked Americans what they considered as the top three factors of the American Dream and 68% said living in **freedom**, 56% said **owning a home** and 47% said being **financially secure**. We asked the same exact question this past weekend and there is a reassuring vindication of our values: Today, 69% say living in freedom is foremost, with being financially secure (65%), and owning a home (55%).
- But these aren't normal times. Overwhelmingly, 82% of Americans say the pandemic has changed the American Dream. We see that C-19 has reprioritized our core values **around caring and community**, where over a quarter of Americans (26%) say today's pandemic has reframed the American Dream around **empathy and community**.
- And given we see that the economic effects of C-19 are twice as more personally affecting America as the disease itself, 56% of Americans say having a good job today is a top factor vs. 30% who said this in 2009 right after the global financial crisis.

- **Our national divide is different today as well**: 52% today say democracy is a top factor in defining the American Dream vs. 33% in 2009. C-19 has also unsettled education: 50% today say getting a decent education is vital to our nation's dreams vs. 22% in 2009. What's more is that 34% of parents say the pandemic has made it challenging for kids to get ahead.
- **Yet the needs for many Americans is basic**: With almost 36.5 million people -- about one in five American workers -- having filed for unemployment since mid-March, food itself has become paramount for many. Feeding America, the largest U.S. hunger relief organization representing 200 food banks, said it has experienced a 70% increase in those seeking food assistance since the crisis began and almost 40% are first-time visitors. In April alone, the group said it served 433m meals, [according to The FT](#).
- **But the American spirit is strong**: Today, over 6 in 10 (63%) say The American Dream is attainable today which is a positive shift from 25 years ago when our 1995 Harris Poll, covered in [Vanity Fair](#), found that two-thirds (66%) believed the American Dream had become harder to achieve in the past 10 years, and 75% believed that achieving the dream would be harder still in the upcoming 10 years.

Implication:

The pandemic has undoubtedly challenged our national character, but it has also spurred a national reappraisal of what it means to be American. The pandemic has made traditional notions of thriving more complicated. But at the same time it has made us reflect on caring and community. From seven o'clock rancor to celebrate health care workers to the rise of governors, mayors and local media in esteem and credibility in our surveys – we might not be able to venture out widely just yet. But we are #togetherstrong. Let's see if it lasts.

*METHODOLOGY NOTE: In 2009 this question asked respondents to choose the top 3 factors to the American Dream, today we asked respondents to select all that were top factors to the American Dream.*

Section:

# 03

Topic:

## THE TECH-HEALTH MOONSHOT

Introduction:

Markets rallied on the news that Moderna's study of eight patients showed it was safe and able to stimulate an immune response against the coronavirus. As analytics practitioners, eight is not a reliable sample size! Yet it points to the **great expectations** we have for the healthcare industry to save us and the economy. In fact, our recent Harris reputational surveys find widespread support of tech and pharma, both of whom have been maligned in recent years. Could both be the unlikely saviors of the world?

- As [the FT reports](#), **there are over 100 vaccines in development globally**, at least eight have started testing in humans, including candidates from Moderna Inc. and Pfizer Inc. At the same time, pharmaceutical giants like Johnson & Johnson, AstraZeneca PLC and Sanofi SA are building capacity to make hundreds of millions of doses of their own or their partners' vaccines.
- With machine learning and wearable tech that can track, for instance heart irregularities, across a massive data set of people in real time, **tech seemed poised only a few years ago** to become the nation's digital hospital/drug discovery engine. But Silicon Valley collided with a heavily regulated and bureaucratic industry resulting in fits and starts. Yet, could C-19 be an opportunity for a breakthrough?

- Americans across the board (83%) support the use of AI with healthcare to improve **vaccine research & development** and 74% for **detection of diseases**, and chronic condition management.
- **Pandemic proofing hospitals with AI:** Nearly three quarters (72%) support **integrating AI with hospital command centers** to deliver actionable insights on patients and hospital capacity in real time. Nearly half (47%) support AI chatbots that replace human call centers to address callers' medical concerns and COVID-19 symptom assessment.
- All of this is promising, says our Harris Poll data, but is it practical? [According to the FT](#), "There's quite a mismatch between the [AI] research and its practical use," say Eliot Siegel, a professor at University of Maryland's medical school. Most of the work in AI has focused on individual applications, such as using imaging recognition in radiology, he says. But these one-off applications do not fit easily into the way doctors practice and do not integrate well with the medical systems they use. "It's very difficult to scale that to the information systems we have. There's not really at this point a universal platform," Siegel says.
- Other industries are trying to adapt too, **but outdated policy threatens progress:** Look at what's happening with **manufacturing**, where many stepped up to produce critical supplies and PPE for the front lines without legal and regulatory certainty before they acted to do the right thing. With outdated liability rules, it's impossible to know what actions could expose manufacturers to litigation as they put essential workers back to work. Americans recognize this: 71% support **reforms to protect essential businesses from lawsuits** associated with their response to C-19 if they have made a good-faith effort to comply with varying state and federal regulations. For a tech-health moonshot to succeed, policy must adapt and set a new precedent for industries finding new ways to leverage their resources to fight C-19.
- And given social **distancing until 2022 may be necessary**, [according to Harvard coronavirus researchers](#), this may explain why Americans are throwing data privacy caution to the wind to ensure safe distance: 71% support **remote AI patient monitoring** to allow healthcare professionals to **maintain social distance**.

Section:

# 03

- Also as a public health service in the age of fake news: Doctors are [are tweeting about C-19](#) to make facts go viral.

## Implication:

Fighting this pandemic cannot be done by one player alone, it will require unprecedented cooperation of industries, not just healthcare and tech, but of all corollary industries - both private and public - such as finance, manufacturing, government to rethink policy and practice to ensure new processes can happen successfully. These new partnerships are critical to fighting C-19 but require all industries to be adaptable to navigate uncharted territory as a unified force.

Section:

# 04

**Topic:**

## HOW WILL C-19 BE REMEMBERED?

**Introduction:**

Almost 9 in 10 Americans already say the pandemic will be remembered as a major event in American history. And the bad news is we're still living through it.

- **Americans say we are living through unprecedented times:** 87% say the pandemic will be remembered as a major event in American history alongside wars, terror attacks, and major economic collapses - even more among Seniors (93%), of whom many survived the Great Depression and World War II as children.
- Americans are split on whether to **let COVID be coined as the most important event of their lifetime:** Just over half (51%) say the pandemic has not been the most important event of their lifetime (vs. 49% who say it has). But, younger generations are less convinced; 63% of Gen Z/Millennials consider it the most important event of their lifetime vs. 51% of Gen X, 40% of Boomers, 39% of Seniors.
- Will it be worse than The Great Depression? In our latest [Harvard CAPS / Harris Poll](#), **confidence in the economy continues to decrease**, with a majority of voters believing the country will be in a recession 6 months from now and less than 1 in 3 thinking the U.S. economy is strong and trending in the right direction. However, the number of voters who say their economic situation is declining has peaked, down just three points month-over-month suggesting that the worst impact may be over.

- The survey also shows America is concerned and uncertain about re-opening, and voters [are looking for leadership and unity](#). Behind the fear is a 'W' shaped recovery where further outbreaks could create long-term interruptions in life, happiness and income. Avoiding this seems to be paramount, which may be why 67% of Americans are afraid to leave the house for the first time to go to non-essential businesses.
- More are concerned with **the lasting impact it will have on our nation's youth:** 62% of Americans say the pandemic will have a lasting impact on today's young children, while only 38% say it will be mostly forgotten by the time they grow up. But with age comes the wisdom of resilience, 54% of Seniors say it will have a lasting impact on today's children vs. 68% of Gen Z/Millennial and Gen X. Similarly, while 62% of parents say they think the pandemic will have a lasting impact on today's young children, 38% say it will be mostly forgotten by the time they grow up.

**Implication:**

That half of Americans refuse to let C-19 define them as the most important event in their lifetime speaks to our underlying optimism and resilience. Lifting the curtain of fear will require national confidence and temerity. Look forward to a nation that remembers and forgets at the same time.

Section:

# 05

Topic:

## MADE IN AMERICA (AT YOUR OWN RISK)

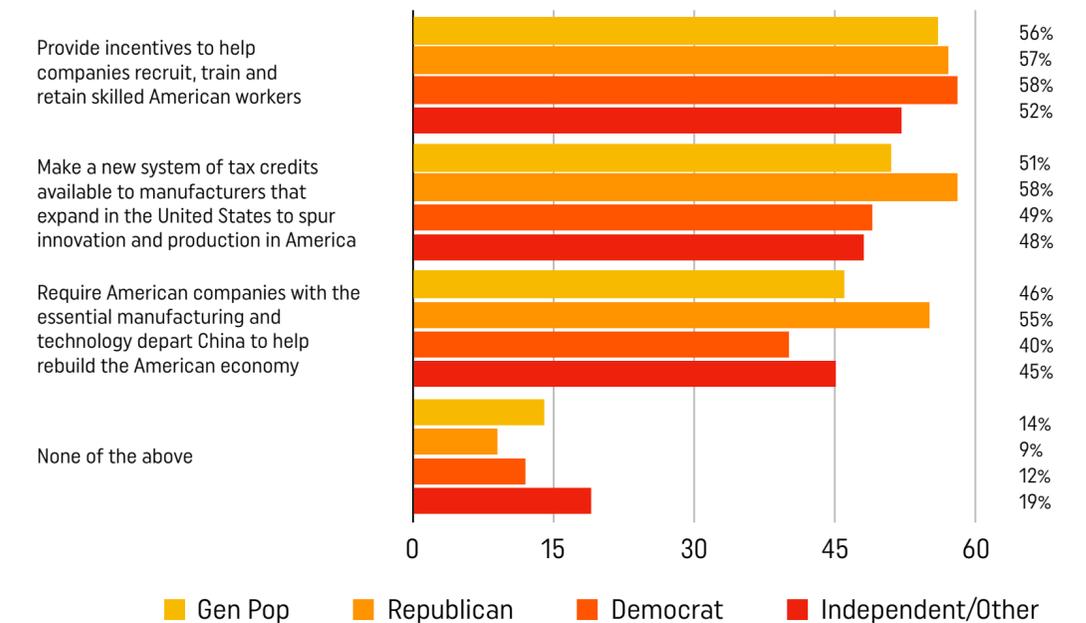
Introduction:

In order to reopen safely, Americans prioritize reforms to safeguard employees. But there are limits to over-protection emerging in terms of hampering an already decimated economy, creating a double bind of vulnerability for both businesses and workers. A dual tension exacerbated by a lag in policy change and a swift moving pandemic, where essential businesses are racing to restart operations with outdated rules and employees are going back to work with unclear protections.

- Nearly 9 in 10 Americans (86%) say Congressional actions to ensure that employees are able to go into work confident that **proper health precautions** are being implemented is an important reform in order to reopen safely. Also, 81% say significant investment is needed in **workforce training programs** to aid dislocated workers.
- But Republicans are more likely to support reforms to **legally protect essential businesses during reopening**: 84% of Republicans vs. 66% of Democrats support reforms so that companies that have been designated as essential businesses and have made a good-faith effort to comply with varying state and federal regulations are **protected against costly lawsuits** associated with their response to C-19.

- Americans are more likely to support legal protections if essential businesses **demonstrate transparency**: 56% would be more likely to support reform to protect essential businesses if companies demonstrate how they are **taking accountability for employee safety** and 40% if companies share how their **business is giving back to and safeguarding society**.
- And there is near bipartisan support for **repatriating manufacturing**: 55% of Republicans and 40% of Democrats support **new policies** that require American companies with the essential manufacturing and technology in China to return to American shores.

To strengthen manufacturing in America, what actions would you support policymakers taking? Please select all that apply



Implication:

Worker safety will hit limitations and risks will be taken amid the pressure to reopen. There's simply no way to assure meat plants or Amazon warehouses are protectable from contagion. Still essential manufacturing, whether PPE or PRIME, will no longer be outsourced. However, more transparent policies, whistle-blowing and fast contact tracing can protect both worker health and productivity by not forcing massive shutdowns. Welcome to the era of *Made In America* – at your own risk.



# WAVE 10

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## WAVE 10 INTRODUCTION

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The following research was conducted between **May 8-10, 2020** by The Harris Poll on the coronavirus outbreak. Fielded among a nationally representative sample of **2,030** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

Topic:

## FUTURE OF FAMILY IN C-19

Introduction:

Fear holds steady in our data. 80% of Americans say they are afraid to leave their home because of C-19. So naturally, the apocalypse can also cause some soul searching. Nearly 6 in 10 (58%) of Americans who said they were planning on being parents in the next five years also say the pandemic has made them less likely to want to have children.

- Gen Z/Millennials and suburbia are less likely to want to have children (65% vs. 49% Gen X) and (66% suburban vs. 53% urban).
- **Parents are tapping the brakes:** A majority (83%) say C-19 has made them less likely to want to have more children, while only a fifth of parents (17%) say it has made them more likely to want to have more children.
- **It's The Economy, Too:** 44% of Americans who say the pandemic has made them less likely to want to have children say it is because of the uncertainty of the economy; 37% say it is because of loss of income during the pandemic.
- **A shrinking support network:** Nearly 3 in 10 (29%) say they are less likely to have kids due to C-19 because they are unsure if childcare will be available or affordable (29%) and want to be able to focus more on their existing family (28%).
- **Uncertainty of a future with C-19:** Over half (55%) of Americans who say C-19 has made them less likely to want to have children say it is because they are uncertain about how long the virus will be around; just under half (46%) say it is because they don't want to bring a child into the world right now.

- **We are trying to be better to each other:** Despite financial hardship (31% have had to cut back on savings), Americans are **nearly twice as likely** to be planning major gift purchases when business reopens than they were five weeks ago (21% vs. 12%). Parents especially (25% vs. 16%) want to splurge on their families, 43% of whom feel regret for the emotional toll the crisis has taken on their children during stay-home orders.
- **Role reversal:** Meanwhile, (42%) say the pandemic **has made them more likely to want** to have children; mostly Gen Xers and urbanites. And interestingly, urbanites are twice as likely to be on real estate websites and thinking about suburbia (43% vs. 21% rural). And kids usually tend to come after backyards.
- Here's a show your future kids might watch: To adapt to set constraints, NBC's [The Blacklist series finale was created in animation](#).

Implication:

Family planning always seems to turn down in a crisis and rear its head like a screaming baby. We saw this after 9/11 and the global financial crisis. But how will C-19 impact our decision making across other life-changing events like marriage, living closer to family, what kids study in college, do they stay closer to home? Many behaviors will snap back, but others will evolve so we will endeavor to study 'big life decisions' in future waves.

Section:

# 02

Topic:

## THE AMERICAN DREAM, REMODELED

Introduction:

After the nation was forced to lie in the bed it made (before, it was a lot easier to overlook aspects of home life Americans may have avoided – relationships, space, neighborhood, attention to décor, yards, etc.) —now we are saying home should be our sanctuary. But who had time to figure that out before C-19? As Americans contemplate a W-shaped recovery, home is where the space is and it's time to make it better now, if and when the curves go up again.

- **Homeowners count blessings:** Now twelve weeks into dystopia, 30% of homeowners say they have felt **glad that they bought their home when they did** so they can quarantine with their family.
- **Also, it's time to renovate:** More than one in five (22%) say "being home so much sparked my interest in renovating my home." Another 18% are looking to make improvements to their living situation, such as moving to a larger residence or upgrading furniture, or 15% buying better electronics. **We also have Pinterest-envy:** Almost a quarter (23%) say "I never want to be stuck in a small house or apartment again."
- **Gen Z/Millennials are ready to 'nest':** One-third (33%) say the pandemic has made them **more likely to buy a home** in the next six months (vs. 29% Gen X), and a quarter (25%) say "I can't wait to own my own home." This is likely driven by a high degree of **cabin fever** which has trended up steadily to encompass nearly 50% of all Americans.

- **At the moment, luxury means space not culture:** Interestingly, 30% of Americans say the pandemic has made them rethink their need for space, and 40% of urbanites last week told us that the C-19 crisis has caused them to consider moving to a less densely populated area of the country. We've even **gone country:** Over one-third (37%) say C-19 has made them want to **live in a rural area** more than 21 miles away from a major city (35% in a suburb within 10 miles of a major city). Meanwhile less than a fifth (19%) say they want to **live in a major metropolitan city**.
- **House hunting goes virtual:** Surprisingly, 31% of Americans have **virtually toured homes** online since the start of the C-19 pandemic: 13% virtual tours lead by a real estate professional, 13% virtual open house, 10% a 3D home tour, 9% watched a video of a tour. A near equal number (40%) say they are touring virtually because they like checking out new neighborhoods.
- **Yet half will wait for the open house:** Despite the prospects of virtual home buying, it's not clear the web will close the sale: 51% of Americans say **they will feel comfortable touring a home in person** in 2020, 49% say they will feel comfortable touring in person in 2021.
- **Also, 1 in 4 renters want to be owners:** A quarter of renters (25%) say "I never want to be stuck in a small house or apartment again" and "I can't wait to own my own home" (24%) and (26%) say the pandemic has made them more likely to buy a home in the next six months. An equal number of renters want flexibility: 26% say, "I'm glad I'm renting so I have the flexibility to move when the pandemic ends."
- [Vice](#) details how the pandemic could offer Millennials their best chance to buy a home in their lifetime.

Implication:

C-19 hasn't killed the American Dream of homeownership. In fact, if anything it has bolstered it by recognizing the importance of "home" and in doing so reframing its purpose around safety, nurturing and togetherness. Look for homeownership to spike if there is a setback in reopening. Americans are preppers now and having a good living situation is paramount.

Section:

# 03

Topic:

## BEARISH ON C-19 BUT BULLISH ON STOCKS

Introduction:

Despite the fact that the economy is “closed,” unemployment is record high and three-quarters (75%) fear leaving their home for essential errands, Americans have unbridled confidence in the markets.

- **Betting on a boom:** Nearly 4 in 10 Americans (37%) **think the stock market will go up** over the next year vs. less than a third (32%) who say it will go down. Even though a third are unsure of what will happen (31%), more **Americans have put more money in the stock market than have taken out** since the start of the C-19 pandemic; and 23% have put more money into the stock market vs. 19% who have taken money out.
- **Younger Americans are more bullish:** Understandably, Gen Z/Millennials and Gen X are more likely than Boomers and Seniors to say that they have put more money into the stock market than older people who want to avoid volatility (30% and 31% vs. 16% and 13%).
- Meanwhile, many are **dipping into their retirement savings:** Nearly a quarter (22%) have had to because of C-19, especially Americans with an annual HHI of \$75k+ (26% vs. 19% of HHI \$50K) as well as urbanites (35% vs. 16% suburban and 15% rural).

- **Men are the most bullish:** Nearly half of men (46%) say the **stock market will go up over the next year** (vs. 29% women) while nearly a third of men (27%) **have tapped their retirement savings** because of C-19 (vs. only 17% of women).
- **Gen Z/Millennials are strategizing** to make ends meet: Gen Z/Millennials are more likely than Boomers and Seniors **to have moved investments around** but not added or subtracted overall (23% vs. 14%, each). They're also more likely than those Boomers and Seniors to say they have had to dip into their retirement savings (28% vs. 17% and 8%).
- Meanwhile, the economy has lost 20.5 million jobs, pushing unemployment to 14.7%. To put that in contrast the total number of jobs lost in the last recession was 8.7 million and unemployment peaked at 10% in 2009. Moody's does not expect the country to make up all the jobs currently lost until 2023.

Implication:

The stock market keeps rising amid record unemployment while (so far) a real estate crisis has been averted. Consumerism is an essential link to avoiding a complete crash. So the stock market might ultimately be in the hands of testing and tracing as states reopen. C-19 can't kill capitalism as long as consumers feel safe and confident venturing back out into the marketplace.

Section:

# 04

**Topic:**

## WHAT REOPENING CAN LEARN FROM A NOR'EASTER

**Introduction:**

New York City and surrounding urban centers along the northeast coast have been hit the hardest by C-19 and business decision makers in those regions are heeding caution: After restrictions are lifted, business decision makers in the Northeast and urban regions are most likely to remain closed until the virus is gone, cut hours, and telework versus those in rural regions and those located in the South and Midwest. It is for these reasons, the Northeast might hold the keys for an effective (and safe) reopening.

- First, we see that **Northeast business decision makers** are taking the **most conservative approach to re-opening**: 40% of Business Decision Makers ("BDMs") in the Northeast say their business is planning to change to telework options even after stay-at-home are lifted vs. only 26% of BDMs in the Midwest and South, and 24% in the West. Also, 35% of BDMs in the Northeast plan on reducing staff vs. 15% Midwest, 19% South and 24% in the West.
- **Urban and Suburban BDM's are taking more precautions**: 26% of Urban BDMs (and 20% of Suburban) say **their business is planning to remain closed** vs. only 8% of Rural BDMs after restrictions are lifted. More than one-third (36%) of Urban BDMs say they plan on limiting capacity vs. 27% Suburban and 11% of Rural BDMs.

- **People Power**: Northeast BDMs are most likely to say that the most positive impact a company can have on society is **continuing to pay and insure employees** (50% vs. 40% Midwest, 27% West), BDMs in the South are also heeding the same call to action (49%).

**Implication:**

The ravaging effects of C-19 on New York City, NJ, CT and MA have not fallen on deaf ears; business leaders in similar environments recognize they have a duty to protect their employees and society at large in order to reopen. Watching their reopening strategies from test and tracing thresholds, rural to urban rollouts, open streets, etc. could be the model playbook for the nation.

## Section:

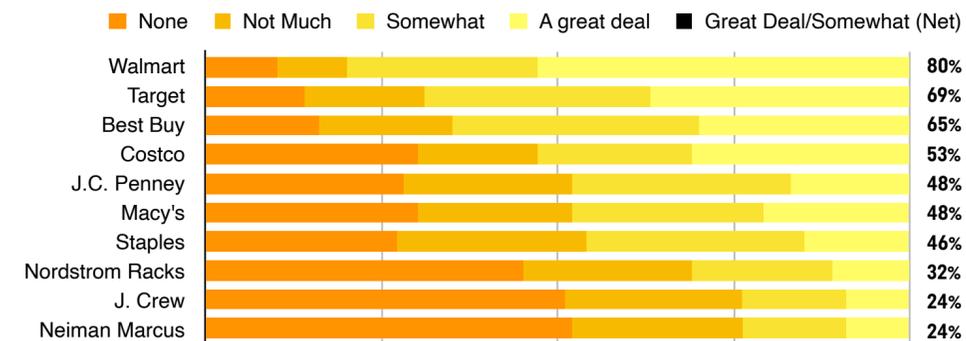
# 05

### Topic:

# BIG BOX, BIG LOVE

### Introduction:

While seventy percent of Americans tell us they miss shopping in stores, what they REALLY MISS is big box retail. Given the recent bankruptcies of iconic retailers, we asked Americans a simple question: Who would you miss if they went away?



As you can see, large retailers like Walmart, Target, Best Buy and Costco have avid lovers who would greatly miss them. And as Americans have migrated over the past months from Amazon boxes to big bulk buy trips (anyone remember the '90's?), Big Box reminds us of their big worth.

- **Miss You:** 8 in 10 say they'd **somewhat/greatly miss big box retailers** if they closed for good, indicating not only the big box love but the **staying power of established brands** and the growing attraction to the **one-stop shopping trip** that consumers quickly came to recognize as the only way during a pandemic.

- **Gentle Giants:** When it comes to shopping during the pandemic, **size does not hinder safety**, consumers are just as comfortable shopping at big box retailers (50%) as they are at a small boutique store right now during C-19, presumably because there's so much space to feel safe.
- **Buying online is safer, for now:** While two-thirds or more say it is safer to buy big items online right now, there are some **products they need to see in store before they buy**: 60% say they'd prefer to buy appliances in-store to see before purchasing as well as 57% TVs, 50% phones, and 49% computers.
- Two thirds of Americans (66%) **will return to Big Box stores** within three months for consumer electronics. Who will be first to return? Men (68%), Gen Z/Millennials (70%), higher income households (69% HHI \$75K+).
- **And wifi problems wins over germs:** Consumers gladly welcome **Geek Squad** into their homes during C-19; a majority (59%) would be comfortable having an expert professional come to their home during the pandemic to troubleshoot technology issues in-home, with at least some safety precautions. With the number of **households turning into home-offices**, there is nothing more reassuring than having a **personal tech savior** arrive in the nostalgic Volkswagen beetle to save us from our tech meltdowns. Good thing [Best Buy announced that Geek Squad will soon be back in service](#).
- Other companies showing their public they're indispensable: CLEAR will provide [coronavirus screening](#) for businesses.

### Implication:

Expect to see Big Box retailers draw big crowds as shopping returns. And big runs to the store might be an enduring buying habit once again. Bulk buying is for now, back en vogue.



# WAVE 9

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## WAVE 9 INTRODUCTION

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The following research was conducted between **May 1-3, 2020** by The Harris Poll on the coronavirus outbreak. Fielded among a nationally representative sample of **2,039** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

Topic:

## WHAT'S CHANGED AND WHAT HASN'T

Introduction:

It feels like longer, but we are now nine waves into tracking American sentiment since March 5th. And some clarity is emerging as to how American life may be **fundamentally altered** as well as **what might snap back**:

- Our national empathy is only growing: Three-quarters of Americans (75%) who say they **feel more gratitude** toward others and **appreciation for what they have** is growing --- with near equal numbers (73%) feeling more compassionate and forgiving.
- And interestingly, this softer side is also red, white and blue: 8 in 10 Americans (82%) say the most patriotic thing we can do right now is to **make a national sacrifice** to stay home for the welfare of others; this has slipped only marginally, even as economic pressures mount. In fact, nearly 9 in 10 Americans (89%) have taken steps to make sure they leave their residence as little as possible, up from (76%) on March 15th. The same goes for taking preventative measures such as washing hands frequently.
- We are **trying to be better to each other**: Despite financial hardship (31% have had to cut back on savings), Americans are **nearly twice as likely** to be planning major gift purchases when business reopens than they were five weeks ago (21% vs. 12%). Parents especially (25% vs. 16%) want to splurge on their families, 43% of whom feel regret for the emotional toll the crisis has taken on their children during stay-home orders.

- We are **trying to be better to each other**: Despite financial hardship (31% have had to cut back on savings), Americans are **nearly twice as likely** to be planning major gift purchases when business reopens than they were five weeks ago (21% vs. 12%). Parents especially (25% vs. 16%) want to splurge on their families, 43% of whom feel regret for the emotional toll the crisis has taken on their children during stay-home orders.
- **Exploring closer to home** is another consistent desire. Americans are now nearly twice as likely to consider a **car purchase** than five weeks ago (19% vs. 11%). And over the same time period, **vacation planning** is up nearly ten percentage points (33% vs. 24%). We know from consistent fielding that **venturing out is correlated with distance and familiarity**, suggesting road trips over long haul flights and nature/wilderness over urban destinations may be this summer's trend.
- We've also grown comfortable with **telecommuting**: On March 30th, 63% of Americans said they'd be willing to go back to the office immediately or within the first month once the government provides information that the spread of the virus is flattening. Yet today only 49% say that. In fact, 84% agree that "If the work is able to be done remotely, employers should not require their employees to return to the office until COVID-19 is no longer a threat." Looking forward, we want some blend of home and office.
- **It's prime time to rethink the mall**: Brick and mortar retailing was hurting before C-19, but now Americans are accelerating their online shopping along with their zooming and other digital adaptive behaviors from the bunker. In fact, 49% say they will be doing more online retail shopping for items such as clothing as restrictions lift with only 15% say they will be doing more in-person shopping than before.
- Speaking of online fashion, virtual catwalks: [Is this the future fashion show?](#)
- More takes: The U.S. consumer is nesting. [Will that last?](#)

Implication:

After 9/11, unity and resolve gave way to partisanship and division. But this time a shared national value toward empathy and selflessness is building off climate change, gender inequality, new generational values, and the remarkable sacrifice of our healthcare workers. Critically, it doesn't require us to be together physically. Could our Zoom distance make us more relatable to one another?

## Section:

# 02

### Topic:

## WHERE'S THE BEEF?

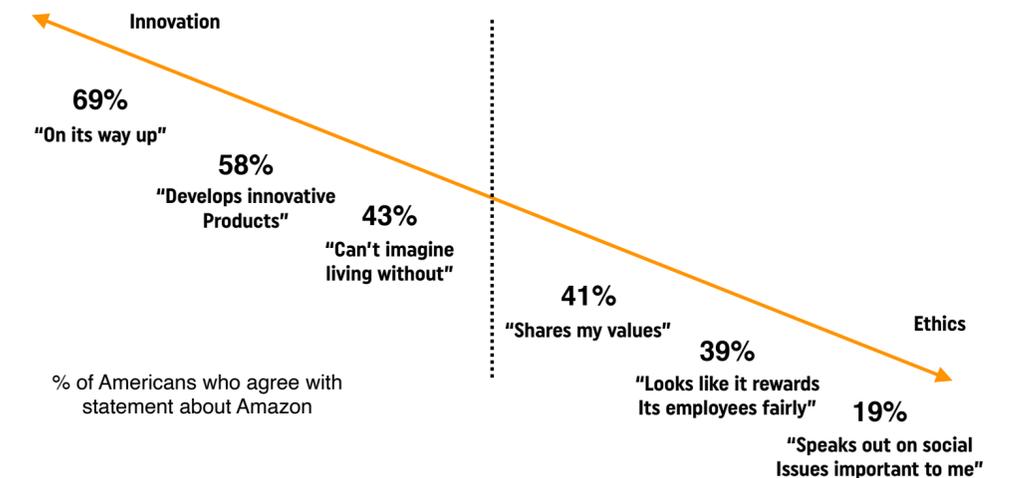
### Introduction:

In recent weeks the **demand for meat** has spiked during the COVID-19 pandemic and the shortages that were on the horizon are nowhere. Yet as consumers hoard meat, workers continue to work in close-quarters at factories causing virus outbreaks and shutting down plants, further worsening shortages. Our polling asks, **when is consumerism a public health danger?**

- 8 in 10 Americans (80%) are **aware of potential shortages of meat** and half (50%) are stocking up on at least one type of meat or fish: 41% are stocking up on chicken, 37% on beef, 27% on pork, and 27% on fish.
- As a result of the run on meat, Costco now **limits customers** to 3 meat items per person, when in fact they should say 'men': In our survey, men are hoarding chicken (47%) vs. (37%) women as well as beef (43%) vs (31%) women. (Can't get beef? The newest isolation trend: [Flour shaming](#)).
- President Trump has used the [Defense Production Act](#) to keep meat companies open to combat shortages, but twenty plants had been closed with over 1,000 exposures and 15 fatalities according to The United Food and Commercial Workers, which represents meat processing workers.
- As [WSJ](#) states, "President Trump's executive order allowing meatpacking plants to continue operating through the coronavirus pandemic is stirring concerns among local officials wary of new spikes in infection rates if closed plants rush to reopen."
- [Fox News](#) reports "nearly 900 workers at Tyson Foods plant in Indiana test positive for coronavirus."

- Our Harris Poll special report on [Everyday Heroes](#), those front line workers in factories, grocery stores, and food delivery found one-quarter (25%) say **physical distancing** from co-workers or their customers/the public is **not possible** given the nature of their work. Moreover, 42% of workers are practicing social distancing from family members at home and 23% are going even further by self-quarantining.
- That's a steep price for a hamburger. We found similar compartmentalizing of consumer responsibility where (in the same 2019 survey) consumers praised Amazon's essential role in their lives while simultaneously criticizing their corporate values (see chart):

### Consumers Are Hooked On Amazon's Innovation, But At What Point Will Scales Even Out?



(Those who agree rated the company a 6 or 7 on a 7-point scale, with this 7 being the statement "describes the company very well")

### Implication:

There is a hidden consumer indifference in bingeing. Consumers hoard meat without consequence, forcing companies to meet demand and workers to risk unsafe working conditions. Ironically, consumers are the first to call out company supply chains for lapses of integrity, but what about our own spending? WW2-style rationing might be warranted again.

Section:

# 03

Topic:

## NO-FLY ZONE

Introduction:

The skies aren't friendly. Air carriers are expected to [lose more than \\$300 billion of revenue](#) this year and the prospects of getting flyers back are hampered by (in our new survey) passenger reluctance to accept half-measures of hygiene:

- **Masks alone don't fly:** Despite [new mask policies by JetBlue](#) and others this week, half of Americans (48%) say even given that they will not feel comfortable flying until the pandemic is fully over.
- **Airlines need to make safety measures efficient:** Almost 8 in 10 Americans (79%) say they are less likely to travel if additional sanitation measures require passengers to arrive up to four hours before their flight.
- Worse, Americans **don't feel the same sympathy towards airlines** like other battered industries. Only 1 in 5 (19%) say their opinion of the airline industry has become more positive in the pandemic; less than all other measured industries aside from real estate and about half that of other struggling industries such as small business (42%) and restaurants (38%).
- **However, a more holistic safety approach works:** 28% say if the required mask policy is mixed with additional safety and sanitation measures, it would make them feel comfortable to fly again. As we urge, think of [safety as a customer journey](#).
- The airline industry has received \$60 billion in relief amid a growing clamor to say **no to big company bailouts**. In echoing a refrain from the financial crisis, academics argue that larger companies differ from smaller ones in that, among other things, they tend to survive bankruptcy, [according to Quartz](#).
- Thankfully, our data that shows **Americans want to get back to flying** (41% miss flying on an airplane) and who will do it first: within the first three months, 41% of men vs. 26% of women; 40% of Gen Z/Millennial and 37% of Gen X vs. 27% of Boomers and 25% of Seniors. One positive motivator? [Frequent Flyers lament the loss of their status](#).

- Axios outlines the difficulties ahead for flying: [Air travel will never be the same after coronavirus](#). Harris Poll and Forbes suggest [four ways airlines can get Americans flying sooner](#).

Implication:

Airlines need to think about 'early adopters' who will come back first and set the tone for others. To woo them back, both safety and efficiency will need to be addressed to meet the needs of men, high-status business travelers (men and women), Gen Z leisure travelers, and higher-income households (those we identify as the first to return to flying).

Section:

# 04

Topic:

## DEATH OF THE OPEN-OFFICE: A BOON TO REAL ESTATE?

Introduction:

Try this logic: Offices of the future will need more space to ensure safety in a post-pandemic world and open floor plans will become a thing of the past. But workers will want six feet at all times so **floor plans will actually have to expand**, rather than contract.

- **Social distancing means less open spaces:** 80% of Americans agree that employers should move towards sectioned-off offices and [phase-out open-floor plans](#) to ensure social distancing. And this sentiment runs across all ages of the workforce including 81% Boomers, 83% Gen X, and 73% Gen Z/Millennials.
- **A gradual and staggered return:** While a majority of Americans are hesitant to return to the office, a third of Gen Z/Millennials office workers **will return at least a few days per week** when allowed so as to reduce interaction with others. Overall, almost 8 in 10 (78%) agree that **employers should stagger** when employees are allowed to work from the office to ensure social distancing.
- **A zoning code for COVID-19:** Also, nearly 9 in 10 American workers (88%) think employers must have clear guidelines outlining safety precautions before they allow employees to return to the office; across 90% of Boomers; 80% of Gen Z/Millennials. Some companies are using [basketball technology](#) to fight COVID-19 on the factory floor.

- **And Americans will just wait** until their offices are reconfigured accordingly: 83% say employees should be allowed to work-from-home during the pandemic until they feel comfortable to return to their office.
- Also, as our polling in [Fast Company](#) shows, **many consider leaving urban hot spots** to suburban and even rural life.
- And with many companies telling their employees to work from home for the rest of the summer (or longer), will they also consider semi or permanent leases for larger floor plans in less expensive zip codes? As [we polled for Axios](#) Americans keep wanting to distance themselves from cities and now even suburbs. So should investors short urban commercial real estate and invest in the great plains?
- On that point, Americans are [embracing the trappings of a rural lifestyle](#) during the coronavirus pandemic, according to the CEO of Tractor Supply, which has reported a spike in sales as thousands of families take on gardening, soil tilling and chicken breeding for the first time.

Implication:

American workers demand their safety before returning to the office and employers will have to reconfigure workspaces and floor plans accordingly. Simple math shows that most offices will not be able to host the same amount of employees as before the pandemic. Either a permanent phasing of workers will occur, or will employers want more space so they can see all their employees working?

Section:

# 05

Topic:

## FITNESS BEHAVIORS SHIFT, TECH FOLLOWS

Introduction:

Both online and offline physical activity fuel feelings of hopefulness, relaxation, and a general sense of well-being. Tech-based workouts have the added benefit of also helping to improve participants' sense of connection more than offline fitness behaviors. Additionally, these workouts are easy to access for most; only 6% report any tech-based issue with doing a virtual workout. But can virtual workouts alone cut it for Americans during the pandemic?

- 45% of Americans are exercising more over the past month; parents and affluent households most likely to be part of this fitness boom.
- **Tech-enabled fitness is on the rise** and 27% of Americans have increased their usage of virtual fitness tools, but non-fitness results are mixed: while these online classes & services do fuel a sense of well-being and motivation, they come with a potential downside - they are more anxiety-producing than offline fitness.
- **However, tech can't replace the need to get outside:** As Americans search for ways to reduce anxiety and feel motivated and productive, they are finding outdoor exercise is one of the best cures - positively impacting mental state more than any tech-enabled behavior examined (video calling, online learning, etc.).

Implication:

Consumers will be best served by tech in fitness when digital acts to enable the analog. Can you help fuel more mentally rewarding 'analog' based activities? If fitness companies can find a way to provide an anxiety-free (or anxiety-limiting) experience, there is a strong opportunity for brands to have a meaningful impact in this moment. Considering only 55% indicate they would go back to the gym within 3 months, there is a window for brands to help users forge new home-based habits and to help make their products and services 'sticky'.

Section:

# 06

Topic:

## GAMING ON THE RISE

Introduction:

In the absence of physical sports, both offline and online gaming is increasing. In fact, puzzles and games have been one of the [retail bright spots of the pandemic](#). But will buying that [Nintendo Switch](#) help or hurt Americans? Online gaming is unsurprisingly on the rise, but it's causing almost as many problems as it is solving.

- 18% of Americans have increased their engagement with online gaming in the past month.
- Gaming-based platforms DO provide a sense of relaxation and reduced anxiety for many, but are equally as likely to increase loneliness as to decrease it. Further, gaming is a top contributor to sleep disturbances and poor dietary habits.
- Given the current restrictions, 20% of sports fans say their top live sports 'alternative' would be watching current sports stars play their sport virtually (though the biggest group at 41% would prefer live sports with no fans in the arena).

Implication:

Though we cannot say when sporting events will be back, there may be an opportunity for gaming companies to step up in the current environment. As consumers look to find both entertainment and connection via gaming-based online interactions, brands stand to gain by enabling authentic connection and messages of wellness and good habits.

Section:

# 07

Topic:

## WAITING FOR AFTERSHOCKS

Introduction:

As certain parts of America open back up, officials in Georgia and elsewhere will be closely watching coronavirus infection rates as they lift restrictions. The same goes for ordinary Americans weighing the risks for repercussions in resuming their lives. Large majorities say everyday life won't resume unless the odds to feel safe increase.

- **No place like home:** With nearly 9 in 10 Americans (89%) saying they leave their residence as little as possible, new Harris Poll data identifies that each of us has **certain trigger points** where we are more apt to take risks to pursue activities we value or feel compelled to do either for desire, economics or both.
- Take for instance **where you live:** One-third (34%) of Americans remain very concerned about returning to normal activities, but rural Americans are almost half as risk-averse (25%) as urbanites (44%).
- It also depends on what **you need:** In our new study, (34%) of Americans have sought out new/additional sources of income, meaning venturing out for gig work, extra hours at essential retail, etc. is not a luxury, but a requirement.
- **But it is also a personal choice of what we value:** We observed in our Harris surveys that **business travelers are willing to take far greater risks for what they deem essential:** Among them, 44% are willing to even fly internationally (right now!) to countries that have ongoing/widespread community transmission (CDC Level 2 and 3 countries) as 82% for business meetings with prospective clients, regardless of where they are.

- Even **Leisure Travelers would risk a lot to see close family members:** A quarter (25%) are willing to travel domestically to regions that have ongoing/widespread community transmission and nearly three-quarters (73%) say visits to see close family members is essential for them.

Implication:

What's essential is what's personal. We will all be navigating personal aftershocks of the crisis. In addition to providing a safety net for commercial activity, business must also study society for these inherent and yet urgent desires. Because what seems risky to some, feels essential to others.



# WAVE 8

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## WAVE 8 INTRODUCTION

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The following research was conducted between **April 25-27, 2020** by The Harris Poll on the coronavirus outbreak. 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:

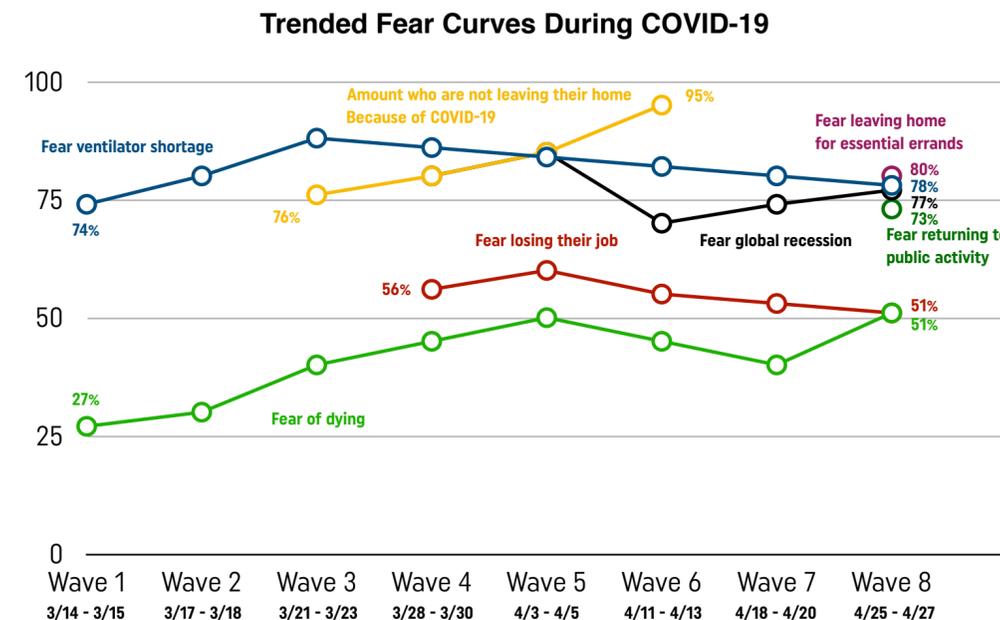
# 01

### Topic:

# SAFETY AS A CUSTOMER JOURNEY

### Introduction:

Add a fifth 'P' to the fundamentals of marketing: Product, Price, Promotion, Place and Purell. As this chart shows, **Americans are housebound** until businesses have a plan to protect them. We liken this to a customer journey that has hygiene as the basis for all commercial transactions, be it flying on a plane, going to a business conference, or shopping in a store:



- Eight in ten Americans (80%) are still concerned of their risk of being exposed to coronavirus when leaving home for errands (84% women; 76% men) and (69%) worry they'll accidentally expose others (72% parents; 65% non-parents).
- Almost three quarters (73%) of Americans worry about **future public activities** such as public transit or socializing (77% women; 70% men); or (68%) going to bars, restaurants, hairdressers, etc. Two thirds (66%) of parents are concerned their kids will be exposed if sent back to school, causing many districts to cancel in-person classes for the remainder of the school year. Taking a flight (66%) is also a concern as is going back to the office (63%).
- Given this, the business community remains more bearish than some lawmakers on reopening: as states push to re-open, [business leaders say not so fast](#).
- Who's re-thinking their safety customer journey? In the **farm-to-table hygiene movement**, Airbnb will make property owners [wait 24 hours between guests](#).
- One prediction: **safety will soon be 'branded' at its source of origin** like a bottle of Evian: Australia is [training veterinarians to be pet detectives](#) to spot future pandemics.
- Dining out remains the thing Americans miss most (70% miss a lot/somewhat) but will need reassurance that it's safe, such as reconfiguring layouts for social distancing (62%). As the NYT reports, many [restaurants are trying](#).
- A sobering statistic: **The coronavirus has killed more Americans than the Vietnam War**.

### Implication:

Industries whose products and services interact on the customer's journey must work together to provide a 'blockchain effect' of hygiene. For instance, hotels may lose bookings if travelers think planes aren't safe. Or, produce sellers may suffer if restaurants can't be seen as in control of their food supply. Frenemies, enemies and adjacent partners all need to work together, sharing data and mapping journeys that reassure and provide peace of mind.

Section:

# 02

Topic:

## PREPPING FOR THE TEST

Introduction:

Experts at The [Rockefeller Foundation](#) believe the U.S. needs to **triple its amount of testing** in the coming weeks from 1 million to 3 million a week and 30 million in the next six months. Testing is key for public confidence but unfortunately, we are not there yet: currently, the U.S. has **tested about 1.6% of the population**. The public agrees: Two-thirds (66%) say proper testing in place must happen before Americans can return to work, while (80%) are concerned about shortages of testing kits for COVID-19.

- This challenge is not a technology problem: “It’s a coordination and logistics challenge, period. And perhaps the most frustrating thing of all is that we did not have to wait for an invention or a reinvention of any of anything”, RF researchers say.
- In fact, Americans see tech as a potential savior. [In our polling for Politico](#), 38% of Americans said their view of the tech industry has turned “more positive” since coronavirus arrived, compared to 8% this wave who said it’s now “more negative.” Also, (41%) believe the tech industry should help solve the outbreak, and (81%) approve of large tech firms specifically helping to trace coronavirus cases.
- And the public is willing to help: our poll found 71% are willing to share their own location data and receive alerts about possible exposure to the virus. A public registry of COVID-19 cases is also popular: 65% favored some kind of database that would show if their neighbors tested positive for the virus.

Implication:

As we’ve shown over the past several waves of data, America’s pessimistic expectations about returning to restaurants, sporting events, flights and hotels collide with their desire to do so. But without testing, there’s no peace of mind to resume normal activities. As States and Federal haggle, Business must expand testing through employee programs, funding to accelerate production or even making of approved kits and other forms of coordinated outreach. How can your company help America pass the test?

Section:

# 03

Topic:

## THE MECCA OF SUBURBIA

Introduction:

Beset by high rents, clogged streets and now a virus unleashed, Urbanites tell us they're seeking the suburban/rural way of life, by considering to move to less densely populated regions in order to feel safe as well as revisit a lifestyle many had in their youth and are reminded of under quarantine. Interestingly, urban Americans are changing their eating habits the most in quarantine mirroring life in the suburbs. Also, they're twice as likely to be looking at Zillow for suburban homes and apartments.

- **Mirroring life in the suburbs:** 73% of Urbanites are seeking more fresh food (vs. 55% Suburban; 61% Rural) and 63% are seeking more home cooked meals (vs. 44% Suburban; 51% Rural) as they look out on the remainder of the year. Meanwhile, Suburban and Rural regions are more likely to already be increasing home-cooked meals (68% Suburban; 66% Rural vs. 64% Urban who have increased home-cooked meals since the outbreak).
- Eight in ten (81%) of Urbanites are concerned about the risk of exposure when they leave their home to run essential errands and 4 in 10 (39%) say the crisis has caused them to consider moving to a less densely populated area of the country.
- Urbanites who are twice as likely to be browsing real estate websites vs. people who live in Rural and Suburban region: urban dwellers (43%) most likely vs. (26%) suburban, (21%) rural.

- A mass exodus was portended for New York after 9/11, only to see its population expand. But what's different now is tele-working, virtual museum tours, plays and concerts. Will Suburbia hold a new swagger to Americans, especially younger ones the way Brooklyn and Austin did for Millennials?

Implication:

The lure of moving to urban cities used to be about opportunity, where city dwellers happily gave up space for the luxury of convenience. Today that space is a coveted sense of security as when the chance of virus transmission spikes in groups as small as 10 people (that's a fraction of a subway car during rush hour).

Section:

# 04

Topic:

## YOU MUST TRY THE DR. JEKYLL DIET

Introduction:

It looks like the health kick is here to stay, but so is the red wine, chocolate and oreos: as tensions continue to rise, our fear of transmission when leaving the house is matched with growing cabin fever when sheltering at home, consumers are shopping to nurture the body and soul: a shopping cart balanced by health foods to protect immunity and indulgent foods to protect our sanity and emotional wellbeing.

- Four in ten Americans (42%) are **consuming more fresh food** and among them, (63%) plan on increasing or (34%) maintaining their consumption; only (3%) plan on less kale.
- And nearly 7 in 10 (66%) are **eating more home-cooked meals**; of them (91%) plan on increasing (51%) or eating the same number of meals (40%).
- Use of **foods for fortification** is a trend: a quarter are drinking more orange juice (24%) and of that group (90%) either plan on increasing (51%) or drinking the same amount (39%).
- Yet (23%) are **drinking more alcohol** since C-19, and among them 35% say they will drink the same or more (37%); only 28% will drink less. Also, 42% are eating more snack foods and of that group 38% plan on eating the same or more (28%). Candy and soft drinks follow roughly the same pattern.

- Why is this polarized diet happening? A combination of stress and gratitude: 37% feel overwhelmed trying to balance work at home and other needs of their family, 52% feel grateful to be home with family, while 55% have cabin fever.
- P.S. speaking of drinking, for your Zoom virtual happy hour try this conversation-starter: Did you know [The Romans invented recycling?](#)

Implication:

Looking out on the remainder of the year filled with uncertainty of 'returning to normal', the one thing we can control is what we eat and how we live at home, consumers are shopping to create a sense of balance we lack in the outside world. As businesses think of the underlying turbulence in people's lives today and how your brand might be the perfect counterbalance to what they're feeling. Right now, everything seems one-part virtue, one-part vice.

Section:

# 05

Topic:

## CLEAN HOUSE, DIRTY HAIR

Introduction:

Either because their housekeeper is in quarantine or the entire family is under one roof 24/7 (or both), Americans are **cleaning the house more** at the expense of their own personal appearance. Uncertainty about the new normal in our future means pandemic-prepping the household over priming our looks for the grand re-opening.

- **Americans are using cleaning products more than 10x/week:** Surface cleaners 7x/wk and floor cleaners 3.5x/wk vs. shampoo 4x/wk vs. razors 2.5x/wk and makeup 2x/wk. And they say they plan on using more or the same amount of cleaning products (90%) surface cleaners (83%), floor cleaners (90%) and appliances like their dishwasher (85%).
- Parents are twice as likely as non-parents to keep the dishwasher running and almost nine in ten Americans (88%) are using the washer/dryer now and will use it more or the same (on avg. 3.3x/week).
- And with all the home meals, 88% say they will use their cooking appliances more or the same in the future (on avg. 8.6x/wk.)
- While 26% of women and 31% of Gen Z/Millennials are buying less makeup, 36% of women plan on using more when they can get out of the house.
- Same goes for shampoo: 92% plan on using more or the same and on average are using 4x/week. And thankfully 22% say they will use more deodorant (current using average is 5.8/wk; women are using more deodorant than men at 6.3 vs. 5.3 times per wk.)

- Shave the beard: 87% plan on using razors or grooming and on average 2.5x/wk
- Zoom vs. Staples: 20% plan on using less office supplies vs. 17% who plan on using more.
- And did you know there's [a right way to sweep a floor?](#)

Implication:

Which behaviors will snap back? Dislocations cause reappraisal of preferences as routines get upended. But research your categories carefully to parse today's usage from tomorrow's desire. And anticipate future interruptions and a consumer who is blended in and out of the house more than before. Products may surge and wane based on in and out of home time spent. But in a battle of the inside vs. the outside, the house is certainly taking market share.

Section:

# 06

Topic:

## THE GROCERY WARS

Introduction:

As Grocery stores and food delivery services battle for the supermarket basket, both have faced supply chain disruptions that have frustrated their customers. Here's where Americans are right now on the tug-a-war in aisle four:

- **Buying groceries:** 45% of Americans are spending more on groceries than were before COVID-19, esp. Parents, adults 35-49 and Urbanites. Most are spending \$100/week on groceries; most of Gen Z/Millennials are spending \$125/week vs. \$120 35-49; \$100 50-64; \$100 65+.
- **Spending more:** 51% of adults ages 35-49 and 48% of 18-34 are spending more than they were before COVID-19 vs. 40% of 50-64 and 39% of 65+. Also, 51% of Urbanites are spending more than they were before COVID-19 vs. 45% of Suburban and 36% of Rural; 49% of Parents are spending more than they were before COVID-19 vs. (40%) of non-parents.
- **Will grocery shoppers come back?** 58% of Americans say they are more likely to buy groceries in store right now and 70% are more likely to do so post COVID-19.
- **And a large number will mix in delivery and in-store pickup:** 43% say they are more likely to order online and pick up in store now and 36% are more likely to do so post COVID-19. Also, 43% are more likely to order groceries online through the retailer and have them delivered to their home right now and 33% are more likely to do so post COVID-19.

- **Fewer see a pure online grocery future:** While a considerable number (37%) are more likely to order groceries through a delivery service (e.g., Instacart, Postmates) right now and 29% are more likely to do so post COVID-19, but these numbers trail the interaction with their traditional grocer. Other Harris data shows online grocery more preferable for staples and non-perishables.
- **Still fewer are into home meal kits:** 29% are more likely to buy meal kits and having them sent to their home right now, and 25% are more likely to do so post COVID-19.

Implication:

Americans love shopping in grocery stores and they've done so throughout the crisis. At this moment there seems to be a combination of in-store shopping (experience/control) mixed with pick-up and/or delivery (convenience/safety). Amazon, Fresh Direct and Instacart should be highlighting their inherent safety benefits and ask consumers in today's age, is grocery shopping an essential task?

Section:

# 07

Topic:

## STERILE OFFICES, BETTER PAY

Introduction:

As Americans eye their return to the office and workplaces reopening, what do workers want to see? Essentially a laboratory-like office environment and hazard pay.

- **In order for workplaces to re-open**, three quarters of Americans (76%) want hand sanitizer everywhere while 67% want PPE such as masks, respirators, 64% want physical barriers/work spaces reconfigured for social distancing, 59% want employee training for proper use of PPE, and 58% want temperature tests.
- There is majority support across the country **for protecting employees who are exposed at work**: 74% paid sick leave, 67% payment for COVID-19 testing, 60% coverage of hospital expenses, 60% coverage for all out of pocket medical expenses, and 52% temporary total disability benefits in lieu of wages. Speaking of sterile, will the Coronavirus [bring back the cubicle?](#)
- **Businesses who don't comply could be liable**: Half (56%) of Americans say businesses that **force non-essential workers to come back to work while COVID-19 still poses a threat should be held criminally liable**.

- **Coronavirus has caused economic hardship for millions of Americans. Now, could it lead to a shift in compensation and workers' rights?** Three-fifths (57%) say the U.S. should raise the Federal Minimum Wage due to economic uncertainty from the pandemic, and 63% would support an increase in their state if on the ballot this November.
- Pitching a minimum wage hike? [Fox Business](#): Mark Cuban says the economic recovery from coronavirus requires a federal minimum wage hike.
- Workers have proven they are 'essential' for their company, but will they be rewarded to help protect them during economic uncertainty? [Bloomberg reports](#) "business groups are pressuring Democratic officials in several states to postpone planned minimum-wage increases, arguing that embattled businesses can't afford to give workers a raise as they face the coronavirus-related economic crisis."

Implication:

The fallout from coronavirus will reshape not just how we work in the years to come, but the conditions in which we work as well as pay and benefits for workers.

Section:

# 08

Topic:

## THE COVID REPUTATIONAL RANKINGS

Introduction:

Companies have the opportunity to reinvent themselves and there's no better time than a crisis to change habits as [our data shows in USA TODAY](#), with the abrupt shift in opinions on the tech industry as online services have become essential to daily life for people working and sheltering at home; positing for stakeholder capitalism that even 'bad' companies can become good. Is the tech industry the next hero to the rescue?

- **Big Tech's Admirable Pandemic Response:** Three-fifths (59%) say the tech industry has had a good response to the pandemic trailing only (76%) healthcare (doctors/nurses/hospitals), 74% grocery, 67% food and beverage, and 66% restaurants.
- **TECH TO THE RESCUE:** 41% think technology companies *should provide solutions* during the coronavirus (third only to the experts in healthcare (62%) and pharma 57%), and 81% *approve of large technology companies helping to trace coronavirus cases*.
- **Big tech is freed from the data privacy bias that used to hold their reputation captive:** 73% are comfortable **sharing anonymous location data** in the interest of fighting the pandemic. Four in 10 (38%) Americans say their **view of the tech industry has become more positive since the start of the pandemic**.

- **Capitalizing in a crisis is the worst thing Americans think you can do:** 27% think companies who create advertisements about COVID-19 are just doing it for publicity, and most of them feel contrived/forced. [The L.A. Lakers](#) join the long list of faux-small companies returning their SBA coronavirus loans.

Implication:

Some industry reputational issues seemed entrenched and unmovable before the crisis. But as the pandemic shows, the public can change its mind. There's no better time than a crisis to change habits. What can your firm do to be 'essential' to society. Americans are willing to bury the hatchet so come and meet them halfway.



# WAVE 7

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## WAVE 7 INTRODUCTION

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The following research was conducted between **April 18-20, 2020** by The Harris Poll on the coronavirus outbreak. Fielded among a nationally representative sample of **2,029** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

Topic:

## AMERICA STAYS PATIENT

Introduction:

Americans are siding with governors in saying their state's social distancing restrictions are **striking the right balance** with just more than 1 in 10 saying they are **too restrictive**. And there is strong support across the political divide to keep them in place for now:

- 7 in 10 Americans (69%) say their state is striking the right balance while 17% say they are not restrictive enough and only 14% too restrictive.
- Strong majorities of Republicans (70%), Democrats (68%), and Independents (68%) say states have the right balance of restrictions.
- In [our polling featured on NBC News](#), over two-thirds of voters (67%) said they **expect it to be at least a month** before Americans should start returning to work and life as normal.
- Meanwhile, financial stress is building for nearly 9 in 10 Americans as we [discussed with CNBC](#), and the [Harvard CAPS /Harris Poll](#) found that **economy and jobs** is now the second most important issue (41% of voters) after the management of the coronavirus crisis (63%).

Implication:

Americans are optimistic about overcoming the virus and getting back to normal which is why they back the current lockdown in overwhelming numbers despite the growing economic pain. Go short on the economy but long on American resilience.

Section:

# 02

Topic:

## EVERY BUSINESS IS NOW LIKE A HOSPITAL

Introduction:

No one single action will make Americans feel safer to fly on a plane, return to work, attend a sporting or large venue event, or eat out at a restaurant. But in a new **Harris Poll business playbook for reopening** there are tactics consumers say will make them feel more welcome and at ease:

- **Eat alone together:** three-fourths (74%) of Americans **miss dining at a restaurant/bar** and patrons want back in but (62%) want restaurants configured for social distancing, and (56%) want maximum capacity limits to ensure 6-feet between diners.
- **Practice haute hygiene:** [according to Eater](#), “You may be having dinner with a waiter wearing gloves...maybe a face mask, a dinner where the menu is disposable, where half of the tables in that restaurant no longer appear, where your temperature is checked before you walk into the establishment.” In fact, our poll found 45% of Americans want **temperature tests for restaurant staff** and even a quarter want a **no-beard policy for waiters and kitchen staff** (22%).
- **No more open floor plans:** in order to feel safe **returning to work** 61% want policies requiring employees to stay home if they feel sick, 48% say no meetings larger than 10 people and 47% say desks should be spaced 6-feet apart.

Implication:

Farm to table thinking now applies to hygiene: every company's cleanliness must be 'transparent and sourceable.' Expect consumers and employees to make demands on businesses which seem prudent to the former and excessive to the latter. And each must manage the tension in customer wants with conflicts in privacy, margins and worker rights.

Section:

# 03

Topic:

## WE'RE ALL IN THIS TOGETHER... BUT ARE WE?

Introduction:

While the pandemic has led to countless numbers of uplifting stories, the story of **Asian Americans being blamed for COVID-19** is not one of them.

- **An Unacknowledged Problem:** while the [FBI has warned of potential surge in hate crimes against Asian Americans amid coronavirus](#), less than half of the public (45%) feel hate/discrimination has risen towards Asian Americans since the COVID-19 outbreak.
- **Lack of Concern:** even more worrisome, **41% say they are not at all or not very concerned** about this growing problem in our country as [Asian Americans grapple with feeling like a person of suspicion in their own community](#) and [slurs they never expected](#).
- **Behind the story:** our [poll shows](#) Americans report bi-partisan distrust of Chinese Government and support The President's tariffs, while 77% blame China for the virus.
- **What does this mean?** We need collaborative action to fight this. The CDC and DOJ worked to stop bias incidents and hate crimes following the SARS outbreak and the 9/11 terrorist attack but [The Center for Public Integrity and NBC report](#) that Federal Agencies have no plan in place to address anti-Asian hate during C-19.

Implication:

We will be looking deeper into this divide in our nation as part of our #washthehate series in the COVID-19 Tracker. See the [harrispoll.com](https://www.harrispoll.com)

Section:

# 04

Topic:

## ALL HAIL VOTE BY MAIL

Introduction:

Who wants to stand in line at the ballot box in November? Not many it seems. Voting-by-mail has **broad and popular support** for the upcoming election: nearly three-fourths of Americans (73%), and a strong majority of both parties, approve of vote-by-mail in November's presidential election.

- **TechCrunch** says *vote-by-mail should be having its moment. Will it?* Among those who disapprove of vote-by-mail (27%), 78% say it is in fear of **voter fraud**, 57% say issues with counting votes, 57% say voting should be done in person and 56% are concerned with security.
- **We wonder:** couldn't the Census takers be mobilized to help ensure analog/mail voting?
- **Local outreach matters too:** in [Austin, buses equipped with wifi](#) are rolling out to neighborhoods with limited online access (see ingenious ways governments are [enforcing social distancing](#) around the world including "keep the distance of one alligator" in Florida).

Implication:

That three quarters of Americans are concerned with going to the polls five months from now gives an indication of trepidation of public places, portending a 'Cruel Summer' at least as far as mass gatherings go.

Section:

# 05

Topic:

## WILL SPORTS RETURN AT ALL?

Introduction:

As fans hope for some return of an NBA playoff, Stanley Cup and the start of MLB, Americans are unsure that sports will go on: one-third (34%) say sports leagues should **cancel this season** and wait until next season to resume, but there are other competing opinions:

- Supporting [Dr. Fauci's plan](#), 4 in 10 say they should either **play the season without fans** (21%) or **restart the current season now and phase fans in later** (20%). Only 15% say they should restart the current season only when fans can attend.
- While more than 4 in 10 (45%) say they **miss watching sports on TV** and half (49%) miss attending sporting events in person, one-fifth of Americans (21%) say there is **nothing that would make them feel safe** to attend a sporting event again. [In our polling for USA TODAY](#), only 6% said they would go to a game as soon as allowed.
- **What's replacing sports?** [As we told The NY Post](#), lots and lots of new streaming. The NYT has a game plan for [what has to happen first](#) for sports to come back. Meanwhile F1 to The Premiere League are [turning to e-sports](#) and giving players devices instead of cars and soccer balls.
- **Our Athlete of The Week:** this [99 year old UK vet](#) raises over \$33 million for the NHS

Implication:

Americans are coming to grips about managing their expectations about hot dogs and a seventh-inning stretch. Meanwhile [re-runs of historic sporting events](#) like The Masters and NBA Finals are reaching record audiences. Sports programmer and historian might be a new post C-19 occupation.

Section:

# 06

Topic:

## BIG TECH AND PHARMA TO THE RESCUE

Introduction:

Sometimes it takes a crisis to turn a black hat, white: a large majority (81%) of Americans **approve of large tech companies** helping to trace coronavirus cases they may have been exposed to.

- **What a difference a pandemic makes:** In our [Axios-Harris Poll 100](#) 2019 Corporate Reputation Rankings, **some tech reputation rankings were battered** while others are rising in American esteem: Samsung was ranked #7, Microsoft #9, and Sony #10.
- According to [The Verge](#): Apple and Google are building a coronavirus tracking system for tracking the spread of the new coronavirus, allowing users to share data through Bluetooth and approved apps from health organizations.
- **Even tech as an industry is rising during C-19:** 38% say their view of the industry has become more positive since the start of the outbreak, and 40% of Americans say the tech industry should provide solutions during the outbreak.

- And the **pharmaceutical industry** also stands to play a big role: as [Fortune](#) notes, “as much as the pandemic has devastated many industries, it has offered Big Pharma a chance to shine as never before, winning back the trust of a public infuriated with years of soaring drug prices. Will they seize the moment? Without a safe and widely disseminated vaccine to confer immunity on a huge swath of the population, it’s hard to imagine life returning to something resembling ‘normal.’” In our tracking, over half (55%) say pharma should be providing solutions during the outbreak, and 4 in 10 (37%) say their view has become more positive.

Implication:

American compliance to share their data is a boon to public health and re-opening the economy safely. Once testing scales, information sharing will be crucial and watch for tech to be a big part of the solution in socializing ‘safe spots’ for consumerism and other economic and social activities.

Section:

# 07

Topic:

## CURIOUSLY, AMERICANS SPURN LESSONS LEARNED

Introduction:

We spent this whole newsletter telling you how prudent and careful Americans are being...and then there's this: Despite the decrease in American's fear of dying from COVID-19 (44%, down from 56% last week) Americans are **not thinking about proper precautions** against the flu next season.

- **Herd Immunity?** While 62% said a C-19 vaccine would be necessary to resume normal activities like flying, going to the gym, sporting events, etc., (57% to return to work), less than half (44%) say they are **very likely** to get a COVID-19 vaccination as soon as it becomes available.
- Only 53% of Americans say they received their **flu shot** during the 2019-2020 season and only 57% plan to get their flu shot for the upcoming 2020-2021 season. That's only a four point uptick in concern, supporting assertions in an [excellent FT essay](#) that humans are poor at assessing risk.
- For an in-depth read of quantifiable human folly, see HBR [Predictable Surprises: The Disasters You Should Have Seen Coming](#).

Implication:

Americans feel the distant future is of no concern, or irrational optimism in our DNA is winning out over common sense. Either way, the good thing is according to our data we're listening to science and trusting the CDC more than The White House. There's still time to get that flu shot!



# WAVE 6

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## WAVE 6 INTRODUCTION

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The following research was conducted between **April 11-13, 2020** by The Harris Poll on the coronavirus outbreak. Fielded among a nationally representative sample of **2,013** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

Topic:

## THE THRESHOLD TO NORMALCY

Introduction:

This is supposed to be the week where we'll see the curve flatten. Yet for most Americans, **it will take a vaccine** to make them comfortable:

- 62% say a vaccine would be necessary to resume normal activities like flying, going to the gym, attending sporting events, etc.
- Barring that, 53% say extreme cleaning of facilities; 48% C-19 testing given to everyone; 37% mandatory masks for workers and patrons; 35% mandatory spacing out of seating; 34% occupancy limits; 25% thermal testing.
- In our [WSJ survey on privacy](#), Americans overwhelmingly support mandatory screenings, location data sharing and patient registries.
- Also, Americans caution against easing off restrictions too soon: more than 8 in 10 (84%) are concerned this will cause a surge in coronavirus cases while nearly three quarters (74%) say the number of cases should have to decline before Americans can return to work; (67%) say proper testing must be in place prior to easing off restrictions.
- Yet [as we told Politico](#), 51% of Americans say we should stay away from work for another month; but 34% are claustrophobic at home.

Implication:

Just as after 9/11, Americans will need to feel safe doing “normal” activities again. Expect growing impatience to speed up normalization. But it's clear we are rethinking what is normal moving forward, and maybe that is a good thing.

Section:

# 02

Topic:

## WHAT DOES A NEAR-NORMAL LOOK LIKE?

Introduction:

We expect public PPE, social distancing enforceable by law and mobile tracking to go mainstream as states look to slowly reopen the economy:

- Nearly 7 in 10 (67%) Americans say people should be mandated to wear masks if they go out in public; and 64% say those who don't comply should face fines, if masks are mandated.
- Roughly the same number (72%) think businesses should have the right to refuse service if a customer is not wearing a face mask.
- And Americans support fining people who disobey social distancing restrictions, such as (65%) going to a public area that is closed (e.g., parks, beaches); 64% congregating with more than 10 people.
- 9 in 10 Americans **consider distancing compliance a 'patriotic duty'**.

Implication:

As anxiety gives way to economics, in absence of testing, social distancing is the only defense Americans have to move forward. This means if you're a restaurant, you need to [rethink your space](#). If you're a Hollywood studio you [need to rethink your sets and production](#). Everything must be done to assure customer and employee health. This is the new value exchange in business.

Section:

# 03

Topic:

## EVERYONE HAS A SUPPLY CHAIN PROBLEM

Introduction:

You've read that [farmers are dumping their crops](#), even while lines at food banks grow. Well, new sourcing challenges are hitting every corner of the economy. Case in point: [Our Wall Street Journal Harris Poll](#) found that Americans are **loading up on streaming services**. Let's take a look at this industry in depth:

- Parents with children at home are spending \$60 a month for streaming subscriptions — well above the general population — and have 3.8 services vs. 1.7 for households without children; 30% bought a new Netflix subscription in March (49% with children vs. 18% without).
- And 56% of Americans are watching 2 to 4 more hours daily. A fifth of homes with kids are watching more than four additional hours of streaming content per day.
- Hollywood has a looming content supply chain problem: as movie theatres, sports and theme parks are shut down, streaming will draw down inventory and if there are no new originals, subscribers will deplete each service, creating a share war.
- Services with deep libraries of older programming like Disney+ and Amazon Prime will be on stronger footing.

- Animation is king: animators can work from home; actors can do v/o remotely, too.
- Studios will avoid bidding wars for hot titles, choosing more small scale fast/easy to produce programs instead; sets will need to become more agile, smaller and re-thought to navigate future shutdowns.

Implication:

You need to war-game your business from every angle and redeploy investments for at least two phases: pre and post vaccine.

Section:

# 04

Topic:

## LIFE IN QUARANTINE: VICES AND GRATITUDE

Introduction:

As [we told the NY Post](#), life in quarantine means every day is kind of like Super Bowl Sunday: about 40% of people say they've been **eating more snack foods** since the outbreak began with 26% admitting they're finding comfort in chocolate; 25% drinking more soda and 20% consuming more alcohol (millennials/Gen-Z 30%).

- With restaurants closed and grocery delivery supply chains slowed, a quarter of Gen Z/Millennials (26%) and a fifth of men (20%) are pivoting towards fast food vs. 17% of the general population.
- Yet it's not all bad: two-thirds of Americans are taking extra time to **make more home cooked meals** (68%), especially adults ages 35-49, and to **eat more fresh food** (42%), especially adults 18-34 and higher income households.
- Half of parents are giving in to **more screen time** (50%), treats (39%) and buying more toys (30%) to preoccupy their kids... and half of the workforce is working in their PJ's (49%) and feeling more productive (53%) now than at the office.

Implication:

As tensions rise with nowhere to go, a little indulgence is en vogue as a means of emotional reassurance; companies and marketers should think how they can help the public find the balance they so desperately need.

Section:

# 05

Topic:

## THINK LIKE A CRASH TEST DUMMY...

Introduction:

Preparing for life PC-19, (post COVID-19) Americans are **coming to terms with saying goodbye** to some of the things they miss the most about life before and replacing foundational parts of the American lifestyle with virtual, live streamed, in-home (aka safe) alternatives.

- 67% of Americans are now more likely to have a virtual happy hour with friends vs. going to a bar (33%).
- Even though 46% miss attending sporting events, nearly three quarters (73%) are more likely to live stream sports at home vs. attending sporting events live in person (27%).
- While nearly 4 in 10 miss going to the gym/work out class (37%), a whopping 85% are more likely to exercise at home vs. going back to their local gym (15%).
- Nearly 8 in 10 (79%) are more likely to watch a movie at home vs. going to the movies (21%) even though more than 4 in 10 miss going to the movie theatre (44%).
- But there are some aspects of life pre-COVID that the public wants to resume in person such as in-person doctor appointments (64%) over virtual (36%) and shopping in store for groceries (73%) vs. ordering home delivery (27%).

Implication:

Americans are adaptive and agile, and some new habits will take root out of the crisis. But Americans are also social creatures who are growing weary of being homebodies. The businesses that will win must provide high quality/safe passage. In that way, every company and marketer needs to think like an insurance company. Trust now means peace of mind.

Section:

# 06

**Topic:**

## AMERICANS TURN FOCUS TO SAVING LOCAL ECONOMIES

**Introduction:**

As **local leadership rises in trust** over the Federal Government (78% vs 54%), Americans are also looking to revitalize their local economy. New data shows they are more favorable and forgiving towards small businesses and brick and mortars that are struggling the most.

- More than 2 in 5 Americans have a **more positive view of small businesses** (45%) and restaurants (41%) since the start of the coronavirus pandemic.
- **Forgiving Businesses Who Can't Pay Rent:** 76% say retailers should be allowed to postpone rent payments if they cannot afford it due to the coronavirus, even if they remain open for business.
- **Favoring Local Manufacturing:** 82% say their opinion of a company would improve if the company promises to relocate their manufacturing away from China and back to the United States.

- Small businesses tell the Harris Poll they are struggling, but 67% of small business owners feel a responsibility to their community and 60% of small business owners feel supported by their community. Read our [special C-19 small business report](#).

**Implication:**

Americans are turning their attention to their communities, meaning companies and marketers that work to support local economies will prosper and also be forgiven for hardships: in fact it might even work in your favor, 55% say their opinion would improve of companies harmed by the crisis asking for a bailout from the federal government.

Section:

# 07

Topic:

## TAXPAYERS TO UNCLE SAM: SHOW ME THE MONEY!

Introduction:

As we spoke with USA Today, almost nine in ten Americans (88%) are aware that the deadline to file taxes has been extended due to COVID-19, nearly 3 in 5 Americans (57%) say they **will not be taking advantage of the later filing**. One can surmise that most Americans are expecting a refund and right now, cash flow is on par with Purell. In a crisis, cash is king:

- More than half of Americans (55%) are concerned that they **may lose their job** due to the coronavirus outbreak. Nearly 2 in 5 (41%) think their **income will be lower** in 2020.
- While a strong majority (61%) say they could live off their savings for 1-6 months, 40% could only live off of their savings for up to 3 months (13% could only live off of their savings for 1 month; 13% for 2 months; 14% for 3 months)
- More Americans think the **economic impact will have a bigger impact** on them vs. the virus itself (65% vs 35%).
- And while (53%) say they are not withdrawing from their 401k early because of new rules/COVID-19, 38% are seeking out **additional sources of income**.

Implication:

Cash-strapped Americans will be cautious investors, savvy deal-seekers and more inventive and attentive in managing their household budgets. Financing plans, discounting and compassionate brand messaging will separate the opportunists from those who build long term affinity as consumers struggle to get back on their feet.



# WAVE 5

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## WAVE 5 INTRODUCTION

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The following research was conducted between **April 3-5, 2020** by The Harris Poll on the coronavirus outbreak. Fielded among a nationally representative sample of **1,993** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

Topic:

## THERE ARE TWO CURVES AMERICANS NOW CARE ABOUT

Introduction:

As we enter into a possible 'peak week' in New York, perhaps it's wrong to think about mitigation as a tradeoff between human health and the economy. As they told us, Americans' livelihoods are now also at risk amid the shutdown and this is becoming a matter of public health. Americans are struggling to pay bills: Over a quarter (27%) have missed (or will soon miss) a bill payment and ages 18-49 are more likely than those 50+ (37% vs. 16%). Especially hard hit are young people. In our interview [for Kaiser Health and VICE](#), our data shows that 31% of 18 to 34 had either been laid off or put on temporary leave, compared with 22% of those 35 to 49 and 15% 50 to 64.

The domino effect moves into American homes where nearly a fifth (19%) say they have missed (or will soon miss) a rent/mortgage payment, especially men (23% vs. 17% women) and 18-49 (27% vs. 10% 50+). As a result, 60% say they can only survive for 1-6 months on their savings and 11% can't live on their savings at all. Four in five Americans (42%) have lost income partially and a fifth (19%) entirely. Americans 18-49 are more likely than 50+ to have lost income partially (51% vs. 31%) and entirely (26% vs. 11%).

Understandably then, over a quarter of Americans (27%) have accumulated more debt than normal and cut back on savings, especially men (31% vs. 23% women) and younger adults (48% of 18-34 vs. 29% of 50+) and a third of Americans (33%) have stopped or cut back on retirement savings, while nearly 2 in 5 Americans (38%) have stopped or cut back on other savings. Nearly half of Americans (43%) think their income will be lower than it was in 2019, notably 18-49 (51% vs. 34% 50+) and \$50k-\$75k HH's (51% vs. 39% of <\$50k HHI).

Amid this pressure, how are we getting by? This week [we lost Bill Withers](#), whose song 'Lean of Me' has been a cultural rallying cry. And indeed, Americans are leaning on family and friends for a financial lifeline; nearly 3 in 10 (28%) have provided financial support for a family member, especially 18-49 (35% vs. 20% 50+). Around a fifth of Americans (19%) have provided financial support for a friend.

Fortunately, we are also summoning our resourcefulness. Indeed, 'Pivot' may become Merriam Webster's word of the year: Around 2 in 5 Americans (38%) have sought out new or additional sources of income. Men are more apt to state this (44% vs. 32% women) as well as ages 18-49 (51% vs. 22% 50+).

Implication:

Many economists say this is a public health decision first and the economics will follow. But the more we suppress the spread by suppressing the economy, the harder the toll on American livelihoods and survival. Flattening the economic curve is a key priority to stemming the anxiety and stress that's growing in discussions across American kitchen tables throughout the nation.

Section:

# 02

Topic:

## TAKING STOCK OF WHAT WE'VE GOT

Introduction:

While our emotions are laid bare, we as a nation are taking time to reflect, connect and to some extent, appreciate life interrupted: The majority of Americans (78%) have felt grateful to be around people they truly care about and more than three quarters (77%) have shown compassion (taking the time to check in with people they care about). Nearly half of Americans (49%) have felt grateful for the break from work to be at home with my family, especially Americans age 18-49 in their prime working years (60% vs. 36% 50+).

And while parents are juggling zoom calls and online education, they are also connecting with their kids: Around a third (31%) have experienced 'Mommy/Daddy' time out-walking away from kids to get a break since the stay-home orders have gone into effect; especially men (38% vs. 25% women) and parents with an annual household income of \$75k+ (36% vs. 25% of <\$50k HHI).

Unfortunately however, nearly half of Americans (49%) and 59% of Gen Z and Millennials have felt lonely and isolated and 40% are overwhelmed since the stay-home orders have gone into effect, a quarter are increasing use of wellness and meditation apps, especially younger adults who feel most alienated and parents who feel most stressed.

Implication:

As the pandemic becomes an unfortunate national routine, dislocation also means reflection. Can this time of crisis yield greater compassion and empathy in our relationships, our communities and into our national partisanship? Most pundits would say no, but social scientists point to defining life events like the Great Depression shaping core values. So how will Gen Z carry forward lessons from the pandemic into their ethos for living?

Section:

# 03

**Topic:**

## WHAT WE MISS & HOW LIFE MIGHT CHANGE

**Introduction:**

Thanks in no small part to news and social media, 56% of Americans fear they could die from coronavirus (up from 27% on March 14) and 68% think the amount of fear is sensible given how serious the pandemic has become, a stark reversal from 3 weeks ago when 56% said the amount of fear is irrational and people were overreacting. At the same time, for many of us the walls are closing in: More than a third of Americans (35%) have felt claustrophobic since the stay-home orders have gone into effect; Americans ages 18-49 are more likely (42% vs. 26% of 50+) to feel this way.

And with uncertainty comes anxiety and frustration: 54% feel angry that they don't know when this will end, this is especially true for Gen Z/Millennials (66% vs 48% of 35+) who are predisposed to stress growing up amid uncertainty as seen in our [APA Stress in America Survey](#). Millennials and Gen Z are most likely to feel overwhelmed right now (52% vs 37% of all adults).

Disruption is also impacting our daily life and personal work habits: More Americans start their day by rolling out of bed and jumping on the computer (56%) while (49%) wear PJs/sweatpants while working from home supporting a trending meme that "We're not working from home. We are at home during a crisis, trying to work." Add to the fact that 50% admit to not taking a daily shower isn't an indication that Americans are becoming lazy, (56% are actually working more now that they are home), but that Americans are doing the best they can in an unprecedented time.

But we are looking ahead! When we asked, which do you think will have a bigger effect on the life of you and your family: COVID-19 itself, or the economic impact of the C-19 pandemic? —almost two-thirds of Americans (62%) feel the economic impact of the pandemic will have a bigger effect on their lives and that of their families than (38%) COVID-19 itself. Women are more concerned about the economic impact (65% vs 58% men), whereas men skew slightly more concerned about C-19 itself (42% vs. 35% women) as do lower income HH's (insurance coverage, access to critical care) and this, in turn, drives their concern to the economic impact.

**Implication:**

Expect economic fear to soon overpower the health fear in America. Companies and marketers need to be understanding and meet the post-trauma of the crisis with economic-driven incentives for their customers from extending payment terms, consolidating debt, and forms of outreach to help consumers bridge into a new and uncertain future.

Section:

# 04

**Topic:**

## PENT UP DEMAND CONTINUES TO BUILD

**Introduction:**

We told you Americans were squeamish about getting back out there. When asked how long after the curve flattens it will be before they will dine out, four in 10 (43%) say they'll do it within 30 days; two-thirds (66%) within three months. One-fifth of Americans (21%) say they will stay in a hotel and 41% within three months and 60% within six months. Airlines don't reach majority tipping points until four to six months after the curve flattens and 57% of people say it will take a year or more before they will take a cruise.

Yet amid America's month of cabin fever, we are seeing desire emerge in between the cracks of fear. People do miss things, obviously. The top three things Americans miss most are: dining out at restaurants/bars (51%), gathering with friends and family (49%), and shopping in stores (39%). And women, specifically, miss restaurants/bars (55% vs. 47% men), gathering with friends and family (58% vs. 39% men) and shopping in stores (44% vs. 32% men).

This week we also asked Americans, "Once the pandemic is over and things return to normal, do you think each of the following areas of your life will be very different, somewhat different or mostly the same?" The majority of Americans feel family, work and eating will be the areas of life to stay the same, especially among middle-class families and Baby Boomers. Almost half of all seniors feel shopping habits will change, a significant difference. And travel/vacations look to be the area most impacted by change which tracks with other data in our survey (above).

But Americans feel social activity, shopping and travel are the categories to become somewhat different after the pandemic, especially younger women, which suggests possible further dislocation for traditional brick and mortar shopping models. Travel/vacations are again expected to change; Democrats seem more insistent of changes happening in their social lives and routines than Republicans.

Yet Americans expect travel/vacations, social activity, personal hygiene and shopping habits to change the most. Younger people and Gen X/young Boomers feel social activity will change especially. Eating habits is the category least likely to see profound changes in American consumption by their expectations. Overall in this data it's important to look at the opposites: e.g. 68% of Americans do not expect their travel/vacations to change dramatically.

That we see such stark levels of fear regarding C-19 in our other data and that we have not yet crested the pandemic suggest Americans might have pent up demand (e.g. revenge spending) that marketers might service once life returns to some normalcy. Americans also report being more voracious users this month of smartphones (60%), television (53%), streaming TV (50%), games (43%), books (35%), music apps (33%), food delivery (22%) and podcasts (18%).

Finally, Americans are also planning longer-term purchases. One in five (19%) say they are considering buying new household goods, furniture, or appliances; 16% buying a car, attending a concert or sporting event or buying gifts or other non-essential items for themselves or their friends and family.

And their answers to how they would prepare for something like this in the future are to keep more of their money in savings (59%) and stockpile nonperishable foods (33%); make improvements to their living situation (18%), purchase a gun (13%) and remodel their kitchen (9%). Men are more likely than women to go "Y2K" including re-thinking their homes (23% vs. 13%), purchasing a gun (17% vs. 8%) and remodeling their kitchen (14% vs. 5%).

**Implication:**

Think about American resiliency in your marketing strategy. There is likely a 'whiplash' effect about to happen as the first sign that things might return to some type of normalcy. Upper funnel activity might soon re-emerge, even in unlikely categories like travel and entertainment.

Section:

# 05

**Topic:**

## WHAT A COMPANY DOES IS MORE IMPORTANT THAN WHAT IT SAYS

**Introduction:**

States across the nation are struggling to address the pandemic as it takes different shapes and forms across communities. Americans are applauding the likes of firms like Honeywell, GM and Ford that are making ventilators, masks and other PPE. More than 9 in 10 Americans have improved opinions of companies that donate money, supplies or employee's time to aid relief in communities (92%) and when a company shifts production to make equipment or supplies necessary to fight the pandemic (91%).

But desired corporate action extends past addressing the pandemic directly to encompass supporting consumers who are indirectly affected; 91% have improved opinions towards companies that allow customers to forgo payments for up to 6 months or offer lower interest rates or other programs.

This also extends to protecting employees: 84% have improved opinions of company executives who forgo salaries, bonuses or other compensation. In fact, 84% say large companies' top priority should be keeping its employees safe, even if it means that customers need to wait to get their products.

Today, corporate action is becoming a requirement to advertise around C-19: 36% say that Marketers should only advertise if they have taken action to address COVID-19 and the amount of Americans who felt companies that advertise about COVID-19 is "a good thing regardless of actions they have taken, because it shows they care," decreased from 41% last week to 38% this week. In fact, 26% think companies who advertise about C-19 are just doing it for publicity, most of them feel contrived/forced.

However, the industries who are taking action see their reputations improve and are also the most trusted sources of information regarding C-19. Public opinion of the healthcare industry has increased since the coronavirus outbreak to 62%, and doctors/nurses as well as medical journals, are the top two most trusted sources of information on the topic (93% and 87%, respectively).

And Big Pharma is becoming Good Pharma with its position to provide solutions: Nearly 2 in 5 Americans (39%) say their view of pharmaceutical industries have become more positive since the start of the coronavirus pandemic and 6 in 10 say the pharmaceutical industry is best suited to provide solutions. We also see this trend rising across technology. More than 4 in 10 say technology is best suited and should provide solutions (42%) and almost four in ten people (37%) now have a favorable view of big tech.

**Implication:**

Every corporate reputation will be redefined by the response to C-19. And as seen in pharma and tech, esteem can literally be remade by a leadership position. Don't be limited by the constraints of your industry, regulation, etc., to not re-think what you could mean to society at this moment. There may have never been a better time to "pivot". Everything is on the table. And remember, don't say it...DO IT!

Section:

# 06

**Topic:**

## ZOOM PARENTING AND THE RISE OF PERMISSIBILITY

**Introduction:**

We all know about helicopter parents. But now in the 24/7 hybrid house-conference room-classroom, leniency is the new currency as at-home as parents try to preoccupy their kids during the workday to prevent zoom video bombs, which 35% of Americans have experienced. As half of parents (49%) have increased their use of virtual meeting sites, over a third (35%) say they have experienced kids making cameos on video or conference calls. Dads are more freaked out about this (43% vs. 29% of women), while Moms say to Dads, 'welcome to the show.' More than half of parents (54%) have been giving in to more screen time to preoccupy kids since the stay-home orders and more than 2 in 5 Americans (43%) have been relying on more treats/snacks to keep their kids happy (new data we'll release Friday in the Wall Street Journal shows that streaming services are the new toilet paper of the pandemic). Finally, nearly a third of parents (32%) have been buying more toys, books or games to preoccupy kids, especially stressed out Dads (39% vs. 25% women).

And with rising cabin fever and not a lot of space, parents with kids in the household are 2x more likely than adults with no kids to increase consumption of gaming and other in-home entertainment to keep their children busy (60% vs. 33% of adults with no kids in HH). More than half of Americans (54%) have felt cabin fever and more than a third (35%) have felt claustrophobic (unable to escape my home) since the stay-home orders have gone into effect.

To combat tight living quarters, 70% of parents have increased use of streaming services (vs. 42% of adults with no kids in the HH), 65% of parents have increased use of social media (vs. 40% of adults with no kids in the HH); 52% of parents have increased use of music apps (vs. 22% of adults with no kids in the HH) and 33% of parents have increased use of food delivery apps (vs. 16% of adults with no kids in the HH). Finally, 28% of parents have increased use of podcasts (vs. 12% of adults with no kids in the HH). Any diversion seems worth a try.

Lastly, online learning is easier than it sounds: Close to a third of parents (31%) are frustrated with online schooling systems. Dads are more likely than moms to be frustrated (37% vs. 27%) suggesting their understanding of the work/life balance and attention to home affairs is still lacking.

**Implication:**

Potential dislocation could be the new normal, meaning Americans will rethink their homes as bunker-goers. From remodeling to accommodate new at-home situational work/school/life living, to stocking up to avoid shortages, a number of COVID-19 preppers will emerge in consumers that could cause new runs on products or new categories not previously considered "essential."



# WAVE 4

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## WAVE 4 INTRODUCTION

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The following research was conducted between **March 28 - 30, 2020** by The Harris Poll on the coronavirus outbreak. Fielded among a nationally representative sample of **2,016** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

**Topic:**

## AMERICA WELCOMES STIMULUS

**America supports stimulus, but split on economic recovery;  
personal checks to individuals and families**

**Introduction:**

As we move into our new normal where three in four Americans are on stay at home orders, approvals are strong for how the federal government (61%), local government (76%) and state government (75%) have handled coronavirus. As reported in our latest [Harvard-CAPS Harris Poll](#), The President's approval rating is rising at 48% and his favorability rating is now 43%; Governor Cuomo is at 45%. For more see [Mark Penn on Fox Business](#).

Of course, two trillion dollars seems like welcome relief: Americans overwhelmingly support the stimulus bill (85%) especially older adults who have been through a New Deal or two (91% of 65+ vs. 79% of 18-34). But Americans are split on whether it will shorten the time it takes for the U.S. economy to recover (yes: 51% vs. no: 49%).

Of course, the personal economy is what matters and nearly three quarters (72%) of Americans expect to receive money, which is highest among middle income HH's of \$50-\$75k (84%) vs. lower income HH's (less than \$50K) and

higher income HH's of \$75k+ (70% respectively). But counting on this to inject life (59%) plan to pay their bills with the economic relief, especially parents (65%) and those making under \$75K (63%).

As for whether it will be enough money, Americans are split. Of the up to \$1,200 for individuals and \$2,400 for families, almost half say this is not enough (46%); exactly equal to those who say it is just the right amount. But with the surge of 3.3 million jobless claims last week, a majority think the amount allocated for unemployment benefits (an additional \$600 per wk. for 4 mos.) is just right (56%) vs. not enough (29%) or too much (15%), while a refund for businesses that continue to pay idle workers (up to \$5,000 per employee) is just right (59%), not enough (30%) and too much (11%).

Americans are generally more satisfied with the \$150 billion for state and local governments with those saying just right (51%) vs. not enough (30%) or too much (19%). Also, Americans feel the \$500 billion in loans to struggling industries is just right (58%) vs. not enough (19%), but almost a quarter (23%) feel it is too much. And of the \$100 billion grant for hospitals, those saying "not enough" (43%) nearly match those who say "just right" (49%).

Finally, as the virus spreads to new hotspots like Detroit, Miami and New Orleans, two-thirds of Americans (67%) feel that states are being forced to compete against each other to acquire limited resources (Democrats 76% vs. Republicans 57%), yet only a slight majority (56%) say the hardest hit states with the most cases of C-19 should be first in line to get aid, while more than 4 in 10 (44%) say "The government stimulus package should be divided equally."

**Implication:**

Correlation vs. Causation - With the personal economy mattering most, marketers should evaluate which C-19 macroeconomic variables are impacting business and marketing initiatives. Take advantage of the data available in the Harris Report to uncover and understand which trends are impacting your consumers behavior.

Section:

# 02

Topic:

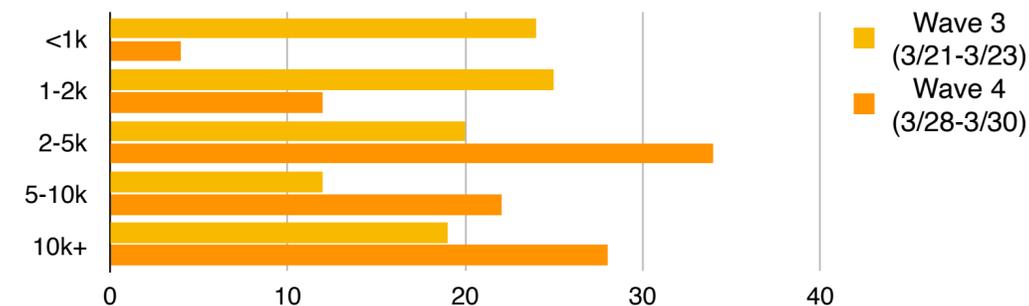
## NO FLATTENING OF THE FEAR CURVE EITHER

Nearly 7 in 10 say “I think the amount of fear is sensible” (up from 46% on March 14)

Introduction:

This was the week C-19 became a clear, present and personal danger; the number of Americans who fear they could die increased 16 percentage points from March 14. Despite actual statistics, which have U.S. mortality odds at approximately under 1.4%, still 4 in 10 (43%) surveyed fear they could die, up from 27%. And while American concern and fear about C-19 is sky high, Americans are swiftly upping their predictions: last week the public expected less than 1,000 deaths (24%), but this week more than a third of Americans (34%) expect between 2,000 and 5,000 deaths.

How many Americans do you think will be lost to coronavirus?



And our national fear is extending to job security where just over half (56%) of Americans fear they will lose their job due to C-19, which is especially high among Gen Z/Millennials ages 18-34 (66%), as well as adults with children in the household (64%) and adults in lower income households (63% among HHI <\$50K). This suggests a ‘barbell’ effect where income may be bifurcated, but the fear is not.

Our data also shows that fears of global recession have become a reality signaling anxieties around income insecurity: over 8 in 10 Americans (84%) say we are already in a global recession right now due to the coronavirus and 4 in 10 think their income will be lower this year (39%). This is especially high among women (42%) who already face a gender pay gap.

As employees struggle to grapple with this new normal, employer action to support workers through new policies has become stagnant.

Q14 What actions and/or policies has your employer instituted to address the coronavirus outbreak (COVID-19)?	W1	W2	W3	W4
Increased paid sick leave	14%	18%	19%	19%
Offered to cover out of pocket healthcare costs for preventative care (e.g., C19 testing, PCP visits, etc.)	12%	13%	14%	15%
Offered 3rd party services/resources to promote well-being and adjustment amid the outbreak	10%	14%	14%	14%

Implication:

The fear of lasting impacts from C-19 is hitting all aspects of American livelihoods. While using emotional marketing to establish connections with your consumers, leading with fear may lead to unforeseen challenges. Explore how your brand or product(s) can help to overcome the “fear of the unknown,” as opposed to inciting it during this complicated time.

Section:

# 03

Topic:

## AS IT TURNS OUT, PANDEMICS BEAT PRIVACY

Americans are willing to be tracked to help stop the spread of COVID-19;  
tech rep is rising

Introduction:

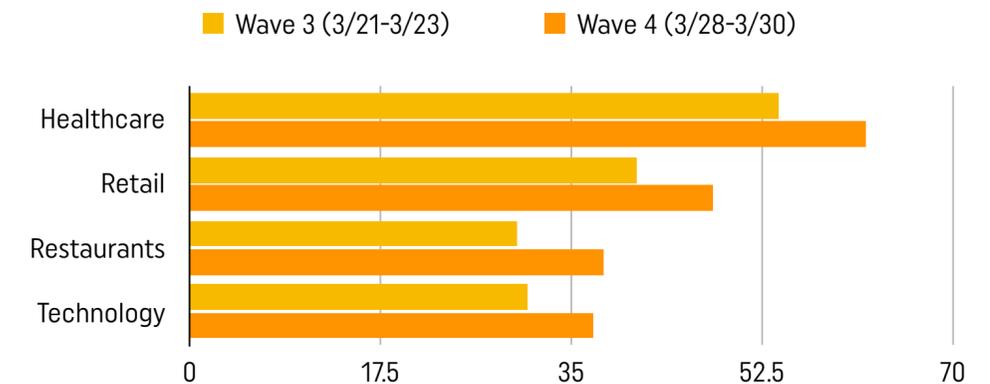
As new models are released from The White House showing the future aggressive course of the disease, Americans want policies to cease mobility and containment even at the expense of sacrificing their personal privacy. The majority of Americans (60%) would support government and public health officials having access to anonymous mobile location data so they can monitor which areas are practicing social distancing while (71%) would be willing to share their mobile data location so that they can be alerted if they were to enter an area that posed a health risk.

Furthermore, a strong majority of Americans (84%) would support a required health screening before someone could be allowed to enter certain crowded public spaces and (77%) in businesses like restaurants, offices and cinemas. Americans ages 35+ are more likely than Americans ages 18-34 to support required health screenings (86% vs. 78%), as well as parents but interestingly, across these questions largely both the left and right are united. Here the numbers really jump when the word 'government' is removed, suggesting that businesses are given a welcome invitation to protect the public health by

accessing people's data.

But perhaps the most interesting data point on privacy is how the reputation of the tech industry has risen during the pandemic. As you can see in this chart, almost four in ten people (37%) now have a favorable view of big tech, equal almost to that of restaurants and retail, and rose only two percentage points less than healthcare.

Feel More Positive Towards Industry Since Start of Coronavirus Pandemic



This is a stark reversal from our [Axios-Harris Poll study in 2019](#), which found that data privacy was the number one social issue Americans felt needed to be solved by business (69%) and approval of business in solving it was at 17%. The techlash has become the healthlash and we'll see if this goodwill lasts. Often, Americans are given to sacrifice in a crisis and at this moment a little data tracking seems to be in everyone's self-interest.

Implication:

With the major shifts on privacy concerns and tech reputations, marketing and technology teams should proactively discuss how their privacy strategies may shift both during and after C-19.

Section:

# 04

**Topic:**

## SMALL BUSINESSES ARE UNDER SIEGE

**Almost 40% of small businesses could be out of business within a month**

**Introduction:**

We released a special Harris Poll Report on the state of [small businesses and C-19](#) today and the news is not good for a key engine in our economy: almost three quarters (71%) say revenue is down since the start of the pandemic; 28% say down by more than 50%.

And while 83% say they are confident their business can last two weeks under current conditions, those numbers drop to 75% in one month and 58% in three months. Also keep in mind that in our survey, half of all small businesses say that at least one other small business depends on them.

But with the President's extension of stay at home orders to April 30<sup>th</sup>, this means potentially 25% of American small businesses will be out of business; add potentially 50% to those who depend on them (13%) and that's more than one-third (38%) or 11 million American small business employing over 21 million Americans (\*using data below); that's before you factor in the community impact, local commercial real estate, etc.

As you've seen appeals from our local businesses for help such as this idea from our neighborhood restaurant offering Frevo bonds (where diners buy \$100 bonds that cost only \$80 giving the restaurants cash flow now), two-thirds of small business owners (67%) feel responsibility to their community and (60%) feel supported by their community

our neighborhood restaurant offering Frevo bonds (where diners buy \$100 bonds that cost only \$80 giving the restaurants cash flow now), two-thirds of small business owners (67%) feel responsibility to their community and (60%) feel supported by their community

The stimulus will help, but a large swath of American small business is on precarious ground and likely the first casualty in an extended stay at home order. Here is a [pdf of the full report](#).

\*There are 28.8 million small businesses in the United States, according to the U.S. Small Business Administration, and they have 56.8 million employees; and over 99% of America's 28.7 million firms are small businesses (JP Morgan).

**Implication:**

With the potential of 40% of small businesses going under in the next 30 days, marketers should examine the role small business play in both their business and marketing strategies. There will be unforeseen and radiating impacts.

Section:

# 05

**Topic:**

## A LOOK OUT OF THE FOXHOLE TO 'REVENGE SPENDING'

**It's not all bad; some green shoots in pent-up demand are appearing**

**Introduction:**

The effects of national social distancing and stay home orders have decimated travel and hospitality. On March 28<sup>th</sup>, the TSA screened 184,027 passengers at U.S. airports, compared with over 2.17 million passengers screened on the same weekday one year earlier. But as the President extends social distancing to April 30, there is a potential hidden indicator of optimism, something we call '[The Ice Machine Index](#)', or the point at which hotel occupancy signals a flattening of the 'fear curve' and we intend to return to (somewhat) normal behaviors.

Americans predict it will take an average of 6.6 months for things to return back to normal, and as our Harris Poll shows in [USA Today](#), they are cautiously setting limits on when they will resume travel. But, we are starting to see pent-up demand growing during this lull, a quarter of all Americans (24%) are looking forward to traveling once things return to normal and business reopen.

And, as our Harris Poll shows in [Forbes](#), in the first month most of us (63%) are willing to resume routine activity like going into the office; then (43%) to restaurants and (69%) in three months. But interestingly, one fifth of Americans (21%) say they will stay in a hotel within a month and (44% combined) within three months. By six months, (65%) say they'll visit a hotel.

Within three months, the fear differential of eating out vs. staying in a hotel narrows. Second, getting to a hotel requires flying, rental cars, etc. Third, warmer months, coupled with leisure travel and 'revenge spending' to account for sacrifice and cabin fever could drive us back out there. And finally, extended shelter in place should only amplify these feelings when it's safe to leave home. Look, it's terrible on all counts. But watch hotel bookings to see when Americans think we're through the worst of the pandemic.

And as Americans look to the future, they're making a commitment to prepare by saving for another crisis; nearly 6 in 10 Americans (59%) say that once things return to normal and businesses reopen they would keep more money in savings to prepare for something like this in the future, and around a third of Americans (32%) would stockpile non-perishable foods.

**Implication:**

Future marketing plans should include strategies around pent-up demand, as well as for cycles of consumer volatility. Plans should take consumer demographics into consideration. Strategies will vary for millennials and baby boomers.

Section:

# 06

**Topic:**

## CV19 MARKETING: DO MORE, SAY LESS

Americans show signs of corona ad fatigue; want to see actions not words

**Introduction:**

You can't turn on the television without seeing one, but opinions towards marketers who promote advertisements related to C-19 are mixed. While 4 in 10 (41%) say it's a good thing, a third (34%) say marketers should only advertise if they've taken action to address C-19, and a quarter of Americans say marketers are just doing it for publicity and most of them feel contrived/forced. Also consider the Pandora's box of further scrutiny if employees have been furloughed, lacking health insurance or protesting their 'essentialness' as [Instacart and Amazon](#) have seen. Calculate the risk/reward here because 44% of Americans say they rarely/sometimes engage with C-19 ads they see and 40% never engage at all.

Americans are, however, increasing consumption across all channels. In our survey (57%) are watching more broadcast TV; (56%) using their smartphone more (especially 70% of Gen Z/Millennials vs 34% of 65+) and (50%) are streaming more TV (67% of Gen Z/Millennials vs 26% of 65+) and a third (35%) are reading more books.

Young adults and parents have also increased their use of social media (60%), news apps (47% of Gen Z/Millennials and 50% of 35-49 vs. 41% of gen pop), virtual meetings (44% of Gen Z/Millennials vs. 26% 50-64 and 31% of all adults), music apps (53% of Gen Z/Millennials vs 34% of gen pop), gaming (56% of Gen Z/Millennials vs 41% of gen pop and 53% of parents/kids). Finally, 36% of parents report increased usage of wellness apps – more than double that of (19%) of adults without children. Try conducting a zoom call with three kids on your lap and you'll understand why this is happening.

**Implication:**

While consumers will return to most normal behaviors, marketers should plan around newly changed behaviors. There may have never been a better time for product innovation. Don't say it... do it!

Section:

# 07

**Topic:**

## THE MODERN-DAY ROSIE RIVETER: AMERICANS AND PUBLIC ACCOUNTABILITY

Americans are doing more now than last week to support their communities

**Introduction:**

Much has been discussed about the role of civic responsibility and the overwhelming majority of Americans (90%) have taken steps to make sure they leave their residence as little as possible, up from 76% last week. In fact, 90% of Americans feel that the most patriotic thing we can do for our country right now is to make a national sacrifice to stay home for the welfare of others. Other measures Americans are willing take in order to help America through the coronavirus outbreak include 4 in 10 who would donate some of their stimulus economic relief to hospitals; 89% say they will stop hoarding items like toilet

paper and cleaning products, 88% say they will quarantine indoors and stop traveling domestically. Even 72% are willing to accept a rations program for certain goods.

This patriotism also goes local: just over half of Americans (51%) say they have checked in with someone they hadn't reached out to in a while, a 7-point increase since last week. Also, nearly one-third of Americans (31%) have purchased something from a small business as a sign of support, up from 26% last week. And overall, around a quarter of Americans have helped an at-risk friend or neighbor with errands (23%), a 4-point increase from last week.

How are we coping in week three? Virtual gatherings, daily walks and setting routine breaks are on the rise for activities Americans are using to cope with social distancing. Overall, around a quarter of Americans have had a "virtual gathering" with friends (27%), a 7-point increase from last week. Americans ages 18-34 are more likely than older Americans to have had a virtual "gathering" (40% vs. 29% 35-49; 20% 50-64; 14% 65+) and nearly half of Americans (47%) are virtually connecting with friends and family to cope with social distancing, an increase of 8 points.

And just over 2 in 5 Americans (41%) are going for daily walks to cope with social distancing - an increase of 5 percentage points since last week, while nearly a quarter of Americans (24%) are setting routine breaks in the workday - a 5-point increase since last week

**Implication:**

Americans are equating C-19 responsibility with patriotism and are "all in" to flatten the curve. Does your brand have a potential role to play in supporting local communities and/or patriotism?



# WAVE 3

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## WAVE 3 INTRODUCTION

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This research was conducted between **March 21 – 23** amongst American consumers as we continue to better understand their mindset and the impact these perceptions may have for brands. This study was fielded online among a nationally representative sample of **2,023** U.S. adults.

Section:

# 01

Topic:

## THE FEAR IS JUSTIFIED

Introduction:

As the pandemic grows, concern is rising and Americans are more fearful and less likely to think the public is overreacting: more people think they're going to contract COVID-19 (20%, up from 16% to start). And now 35% fear they could perish from it. Perhaps this doom and gloom is a psychological reaction to a perfect storm of fear for one's self, loved ones, for livelihood and for seeing no light at the end of the tunnel (yet).

People are more accepting of the level of fear they see:

	WK2	WK3	WK4
I think the amount of fear is sensible given how serious the pandemic has become	46%	50%	61%
The amount of fear is irrational, people are overreacting	54%	50%	39%

People are increasingly concerned about...

	WK2	WK3	WK4
Their personal health	65%	66%	75%
Health of older friends / relatives	86%	87%	90%
The health of Americans broadly	79%	82%	87%
The American economy	84%	84%	91%

Implication:

People remember who rises to the challenge in a crisis. From CPG to Alcoholic Beverages, which industries, companies and brands will be the "Dr. Fauci?" As of this past weekend, Americans have a better view of healthcare (54%), grocery stores (41%), and even pharmaceutical companies (33%) and technology companies (33%); Industries seen as worse since the outbreak: media (33% say their view is "more negative"), travel/hospitality (29%), and airlines (29%). America needs your leadership, comfort and reassurance.

Section:

# 02

Topic:

## HOW LONG BEFORE LIFE GETS BACK TO NORMAL?

Introduction:

Americans are eager to get back into the office! Americans (22%) say that once the government provides information that the spread of the virus is flattening, they would be willing to immediately go to the office. But it would take up to a month after restrictions are lifted would (28%) of Americans say they would go out to dinner or (17%) go to a gym class. It could take 2-3 months for Americans to attend large social gatherings (22%), go to the movies (21%), give a handshake (21%), stay in a hotel (20%), or go to a sporting event (17%). And 15% of Americans say it will take 2-3 months for them to be able to visit a casino or take public transportation (e.g., subway, busses, trains) again. Nearly a fifth of Americans (18%) say it would take them 4-6 months to fly again; 22% say it will take a year or longer before they take a cruise. Americans expect the social distancing guidelines **to last ten and a half weeks**.

Implication:

Marketers will have to rethink assumptions about the PTSD from C-19. On one hand, much of America was back to relative normal after 9/11. But this time feels different and unknown, at the same time. On one hand, a flattened curve means a longer pandemic, which is good for public health, but not for getting back to normal. Think about breaking your brand down into 'snackable' bits, e.g. fractionalized audiences at events; bespoke experiences and bringing the experience to the home or to small groups of friends and family. Look for tech companies to incorporate C-19 testing into smart watches, iPhones to automatically signal 'safe zones' for concerts or the corner market. Privacy concerns aside, the public might go for this.

Activity	Avg time needed to return
Take a cruise	1 year or longer
Fly on a plane	4-6 months
Visit a casino	4-6 months
Stay in a hotel	4-6 months
Go to a sporting event	4-6 months
Go to a gym class	2-3 months
Go out to dinner	2-3 months
Attend/Host a large social gathering	2-3 months
Go to the movies	2-3 months
Take public transit	2-3 months
Greet people with a handshake	2-3 months
Go to the office	1-30 days

Section:

# 03

**Topic:**

## AMERICA EATS IN, BUT FORGETS TO SHELTER

**Introduction:**

Restaurant meals were toast as of last week, but the food delivery appears to now be slowing: Americans are more likely to order take out and pick up themselves (62%) over using food delivery apps (38%), but younger Americans are more likely to do both while older generations are much more likely to order takeout from a restaurant. Shelter in Place isn't an order that's being followed by Grandma and Grandpa: 82% of 65+ are picking up from restaurants.

Also, three quarters (73%) of Americans are more likely to buy groceries in person during the pandemic vs. order home delivery groceries (27%). And again, older Americans are the least likely to order home delivery groceries; less than one fifth (17%) of adults over 55 say they would do this vs. over 3 in 10 Gen Z (33%) and Millennials (36%) and 35-44 (37%).

**Implication:**

Food marketers, retailers and grocery stores need to protect the public health as getting food is lessening social distancing. Can your company and brand help seniors? What is the modern 'meals on wheels' to help our older Americans stay safe inside their homes?

Section:

# 04

Topic:

## THE KIDS ARE ALRIGHT

Introduction:

While a quarter of Americans feel isolated, social distancing does not have to mean isolation and youth are leading the way: over half (55%) of Gen Z and nearly 4 in 10 Americans say they are virtually connecting with family and friends via FaceTime and other means; over two thirds (35%) of Gen Z had a virtual gathering with friends just in the last week (20% of all Americans).

Implication:

What can your brand do to facilitate virtual engagement? You don't have to be a video conferencing company, but what role can you play in helping create engagement with people under the constraint of a shelter in place? And especially with our nations' kids, who seem to enjoy the family time (thus far).

Section:

# 05

**Topic:**

## OUR (VIRTUAL) TOWN

**Introduction:**

We are also seeing a strengthening of our sense of community in our data: 44% say they have “checked in with someone they hadn’t reached out to in a while” and nearly a fifth (19%) have 'helped an at-risk friend or neighbor with errands.’

**Implication:**

There is huge opportunity to find “good” in this experience. What can businesses do to re-educate, re-prioritize, re-appraise? And if virtual living is here to stay for an indefinite period, how do communities change? What do households look like in a world where classes, playdates and conference calls are all conducted under one roof?

Section:

# 06

Topic:

## COPING WITH CABIN FEVER

Introduction:

Americans are staying active, mentally and physically; (36%) are getting back into old hobbies and (25%) are picking up new ones. This is highest among Gen Z (54%) and lowest among older Americans 65+ (27%). 36% are going for daily walks, this is highest among older Americans 65+ (40%). People are also searching for a reprieve by tuning out the news: 4 in 10 Americans say they are “reading more non-news related content to cope”. And almost 4 in 10 Gen Z are setting routine breaks in the online classes or the workday vs. only 10% of adults ages 55-64 and 15% 45-54.

Implication:

Think about what the American family will need not now but perhaps 4 to 6 weeks from now? Video conferencing companies and online streaming are early winners, but what about cappuccino machines, at-home streaming workouts and virtual gyms?

What emotional and educational support will children need for extended online education? And how is that made accessible to all Americans?

Section:

# 07

**Topic:**

## **BAILOUTS, SAY OLDER PEOPLE**

**Introduction:**

Americans say the industries being hit the hardest deserve bailouts: small business (63%) healthcare (58%) and restaurants (53%). Younger Americans are more likely to oppose bailouts while older are more likely to support. And while two-thirds (65%) say it would make no difference if a company receives a bail out, nearly a quarter would either stop using the product/service entirely (8%) or shop for an alternative (15%). 30% of Gen Z would stop buying from a company that received a bailout.

**Implication:**

Understanding the values of your audiences by demography will be important in navigating the pandemic to prioritize issues, messaging, tone and intention. While a topic such as bailouts created similar sentiment in our data during the global financial crisis (and no one stopped buying cars), the political axis has shifted in our country; yet at the same time, Americans' macro worries about the economy might be more important.

Section:

# 08

**Topic:**

## **YOUNG PEOPLE SAY 'MEH'**

**Introduction:**

As of this morning, nearly 1 in 5 Americans are ordered to stay indoors. Most Americans are obeying and say they would still leave the house to go to the grocery store (85%), the pharmacy (81%), or to care for family members in another household (67%). But Gen Z are least compliant: one third (32%) of those aged 18-24 would go out to visit friends, more than half would go to a restaurant for carry-out (53%), and 28% would have dinner at a friend's house. Overall, Americans plan on complying with the sweeping national restrictions. The vast majority of Americans would follow mandates that restrict: convening groups larger than 10 people (93%), international travel (94%), and non-essential workers to their homes (91%).

**Implication:**

If you are a youth brand or have Gen Z in your target audience sphere, urge them to frame compliance like a social cause issue. How can you be pro-climate change and pro-hurting vulnerable people? This is their chance to make a tangible difference in a crisis. Marketers that with success talking to youth should use their skills for the national good. We need a Rosie The Riveter for Gen Z.

Section:

# 09

**Topic:**

# SHORTAGES AND PANIC BUYING

**Introduction:**

Americans are increasingly concerned about healthcare shortages to address the COVID-19 outbreak: nearly 9 in 10 Americans are concerned of a potential shortage of healthcare workers (doctors, nurses, support staff, up 8% since last week). 86% of Americans are concerned about a potential shortage of hospital ventilators (for assisted breathing) or hospital beds (up 9% in the last week). Approximately 4 in 5 Americans are concerned about a potential shortage of surgical masks and gloves (83%) or testing kits for COVID-19 (82%). Concern for a shortage of surgical masks and gloves and testing kits for COVID-19 have increased since last week (12% increase and 9% increase, respectively).

**Implication:**

Companies are not waiting for the government to retool to combat C-19. As this never before seen crisis envelops our national healthcare system you must plan far in advance now.



# WAVE 2

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## WAVE 2 INTRODUCTION

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Our second wave survey dives deeper into American attitudes and perceptions of companies and brands in handling the pandemic. The second study was fielded online among a nationally representative sample of **2,050** U.S. adults from **March 14-15, 2020**.

Section:

# 01

**Topic:**

## SOCIAL MEDIA AND THE EXISTENTIAL THREAT

**Introduction:**

While the majority (73%) of Americans don't fear dying from the Coronavirus (and the same amount say they have not been tested and don't think they should) — others aren't so sure: more than a quarter (27%) of all adults say they fear dying from C-19 and this is highest among men (30% vs. women 25%). Men's concern is heightened on this issue: they are twice as likely as women to think they could die and should be tested for the Coronavirus.

Yet how can 27% fear dying (yet only 16% fear of contracting) the virus? That's hysteria and irrationality. In our survey, 54% agree "The amount of fear is irrational, people are overreacting." When asked, the top contributing factors to fear are drastic headlines about how society is changing (79%); news and images of people fighting over products at the grocery store (78%); constant

posts about people's reactions to the outbreak (75%). And half of Americans (50%) say trying to keep up with all the safety recommendations is driving their fear.

**Implication:**

When using social media for communications, companies and brands should explore steering away from "fear-based" marketing strategies. While fear-based marketing may lead to short-term results, it may not be useful for creating long-term relationships with customers and building your brand.

Section:

# 02

Topic:

# THIS PANDEMIC IS EVERYONE'S FIRST RODEO

Introduction:

Core to the fear is a universal lack of experience: nearly three quarters of Americans (74%) say the fact that this is their first time experiencing a global pandemic is contributing to their overall fear. And this is universally felt among Millennials, (80%), Gen X (73%) Boomers (69%) and Seniors (65%). And nearly half of all Americans (46%) agree "I think the amount of fear is sensible given how serious the pandemic has become." There's simply no historical playbook for what we're living through.

Implication:

Companies must educate their employees and customers and provide information as it evolves.

Section:

# 03

Topic:

## CONTAINING THE VIRUS

Introduction:

Yet the overwhelming majority of Americans feel we will eventually contain the virus. It's important to note that almost a quarter (22%), however, think it will not be contained (and this is highest among Millennials and lowest among Seniors: 25% vs. 12% of 65+). As seen in our latest analysis for [Forbes: U.S. Seniors are the least worried and least informed](#). On average, Americans anticipate it will take more than four months for the response to the coronavirus outbreak to last.

Implication:

4 months is far off from 14 days. The question is, in order to not to lose your market position, what is your brand going to do during and what are you going to do after?

Are your brand's near and longer-term strategies for a non-public consumer?

Section:

# 04

**Topic:**

## **SAYING VS. DOING**

**Introduction:**

While nearly three quarters of Americans (74%) say they're afraid of accidentally spreading the virus to vulnerable people, even if they're not experiencing symptoms, they're not changing their daily patterns to mitigate risk to other people: (89%) are still going coffee shops; (66%) are still going to restaurants and bars; (58%) have not changed how much they're having people over. This data and others have caused public officials to limit crowds and take actions to urge people to stay at home.

**Implication:**

Consumer behavior is being forced to change daily. How are you keeping both your loyal and new consumers engaged? Are you prepared to pivot daily/weekly?

Section:

# 05

**Topic:**

## WORKERS ARE CRITICAL OF BUSINESSES

**Introduction:**

Workers say it's time to stop the emails and start with the policies: one-third of workers say their employer hasn't instituted any actions or policies in response to Coronavirus. Only 11% say their employer has offered to cover out of pocket healthcare costs for preventative care (e.g., C-19 testing, PCP visits, etc.) and only 10% say their employer has offered 3rd party services/resources to promote well-being and adjustment amid the outbreak. What do they want? 57% strongly want employers to enact paid sick leave and 52% want extended insurance policy.

**Implication:**

- Companies and brands must focus on clear communications and provide support and services to protect different generations of their workforce.
- What is the company's strategy for paid sick leave and extended insurance?
- Does the company have business contingency plan?
- How is the company supporting dual working parents with kids that require care and supervision at home?
- How is the company supporting the elderly; how can they provide in-home services, etc.?

Section:

# 06

Topic:

## SCIENCE HAS ITS MOMENT; LOCAL TRUST IS HIGH

Introduction:

Medical sources are the most trusted on the topic of Coronavirus. Trust is high among doctors/nurses (93%), CDC (89%) Medical journals (84%), while social media is not to be trusted on C-19 (63% say it is not trustworthy). Meanwhile 74% of Americans trust state and local governments vs. 59% of the federal government.

Implication:

Personalization and localization is more important than ever. How are you evolving your mass communication efforts to support your consumers facing different challenges locally?

Have you explored an addressable media approach (reaching the right consumers, at the right time, with the right message)?



# WAVE 1

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## WAVE 1 INTRODUCTION

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Below is a summary of selected findings from the Harris Poll first survey on the coronavirus outbreak fielded among a nationally representative sample of **2,019** U.S. adults from **March 5-9, 2020**. These findings preceded The President's Travel Ban/NBA cancellation. Future waves will dive deeper into American attitudes and perceptions of companies and brands in handling the pandemic.

Section:

# 01

**Topic:**

## AMERICANS HIGH ON ANXIETY/LOW ON ASSESSING RISK

**Introduction:**

As national anxiety rises, half the nation fears they will die of C-19; yet the most at-risk are the least concerned (Millennials are the most concerned).

**Statistics:**

72% of Americans are very concerned about the spread of the virus reaching their local area.

Nearly 6 in 10 (57%) of Millennials vs only 47% of 65+ are concerned about dying due to C-19.

**Implication:**

Unclear information to date is now coalescing, making the role of transparency and trust paramount.

Section:

# 02

**Topic:**

## **SENIORS ARE THE MOST DEFIANT (YET MOST VULNERABLE)**

**Introduction:**

The most vulnerable demographic are also the least willing to change their behavior amid the C-19 outbreak.

**Statistics:**

81% of 65+ are still willing to attend family social gatherings vs. only 71% of Millennials.

**Implication:**

Companies and brands must focus on clear communications and services to protect the elderly; how can they provide in-home services, etc.?

Section:

# 03

**Topic:**

## AMERICAN WOMEN MOST CONCERNED

**Introduction:**

Women are more concerned than men about the spread of C-19 in their community, while Millennial/Gen X men are more concerned than women about dying from the virus.

**Statistics:**

- 82% of women are very concerned about the spread of the virus in the U.S. vs. 72% of men
- 75% of women are very concerned about the virus reaching their local area vs. 68% of men
- Meanwhile, 63% of men ages 35-44 are very concerned about dying from C-19 vs. only 58% of women ages 35-44

**Implication:**

Marketers should be considering the critical importance of winning over their loyal women customers by abating fear and providing value-added services, such as zero-interest services to protect the elderly; how can they provide in-home services, etc.?

Section:

# 04

**Topic:**

## AMERICANS ARE COCOONING

**Introduction:**

Americans are shifting behavior by avoiding non-necessity outings, for now.

**Statistics:**

- More than 8 in 10 are still willing to go to the grocery store, work, pharmacies and social gatherings
- Meanwhile, less than half are willing to go to sporting events (44%), bars (42%), and gyms (42%)
- 83% still feel obligated to go to work even though they are unwilling to go to other public places
- 53% are still willing to go to schools despite the Coronavirus outbreak

**Implication:**

A boom to home fitness, cleaning supplies, e-sports, online learning platforms and streaming services, not live events, gyms and travel/hospitality industries — what is your brand's near-term strategy for a non-public consumer?

Section:

# 05

**Topic:**

## THE CORONA ECHO CHAMBER

**Introduction:**

C-19 is all Americans can talk about but the way we're talking about it is likely making national anxiety worse.

**Statistics:**

- 63% have talked to someone about C-19 (friends, family, colleagues, doctors) since the outbreak
- 60% say "people I know talk about the Coronavirus like it's a horror movie"
- 61% are concerned xenophobia will increase in America due to the Coronavirus outbreak
- A quarter of Americans feel unknowledgeable about the Coronavirus

**Implication:**

Companies must educate their employees, customers and provide information as it evolves.

Section:

# 06

**Topic:**

## LOSING FURTHER FAITH IN GOVT. & MEDIA

**Introduction:**

Americans, now awakening to the real threat, are frustrated at government's effectiveness, but also blame the media for 'dramatizing' the Coronavirus outbreak.

**Statistics:**

- 63% of U.S. women are more likely to be concerned about the government's ability to effectively respond to C-19

**Implication:**

In a recent Harris Poll, 60% of Americans said business should step in to solve social issues where the government is lagging: without being opportunistic, how can your brand be helpful?

# Questions?

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