

# COVID-19 CONSUMER RESEARCH WAVE 109 EXECUTIVE SUMMARY

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MAY 27 - 29, 2022

**Stagwell** and **The Harris Poll** have partnered to conduct research to monitor the pulse of the American Consumer.

The executive summaries on the pages that follow provide insight into current consumer attitudes and behavior and can be used to help navigate the changing industry landscape. We hope this information proves useful to you and your team as you address these changes in real time and strategize for your next moves.

As always, we are here to help. Please don't hesitate to contact us with any questions you may have.

Positively,

**Ryan Linder + The Stagwell Family**

Global Chief Marketing Officer, EVP





# WAVE 109

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## WAVE 109 INTRODUCTION

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

Section:

# 01

Topic:

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

Introduction:

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

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

Implication:

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



Section:

# 02

Topic:

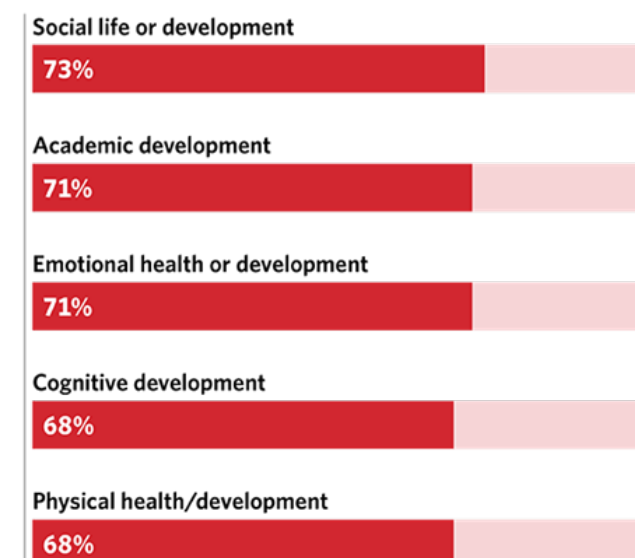
## PARENTS AREN'T ALRIGHT: APA-HARRIS POLL

Introduction:

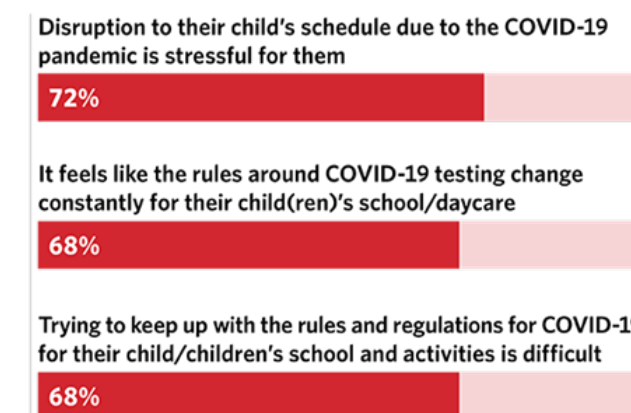
Parenting is always hard, but it's being compounded by global unrest, an unpredictable economy, and an ongoing pandemic according to our [survey with the American Psychological Association](#) and [covered by Axios](#).

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

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



PARENTS AGREE THAT:



STRESS IN AMERICA™ 2022: COVID SECOND ANNIVERSARY

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Implication:

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



Section:

# 03

Topic:

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

Introduction:

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

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

Implication:

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



Section:

# 04

Topic:

## THE BRANDS THAT TRANSCEND POLITICS: AXIOS-HARRIS POLL

Introduction:

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

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

### Most reputable companies, by party

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

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

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

Implication:

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



Section:

# 05

Topic:

## INSTAGRAM CASE STUDY – REPUTATION IN CRISIS: HARRIS BRAND PLATFORM

Introduction:

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

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

Implication:

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



# Questions?

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**KNOWLEDGE IS POWER**

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