

COVID-19 CONSUMER RESEARCH WAVE 118 EXECUTIVE SUMMARY

SEPTEMBER 16 - 18, 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 118

WAVE 118 INTRODUCTION

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

Section:

01

Topic:

GEN Z ARE DIRTY, ROTTEN, STREAMING STEALERS

Introduction:

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

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

Implication:

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

Section:

02

Topic:

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

Introduction:

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

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

Implication:

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



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

Section:

03

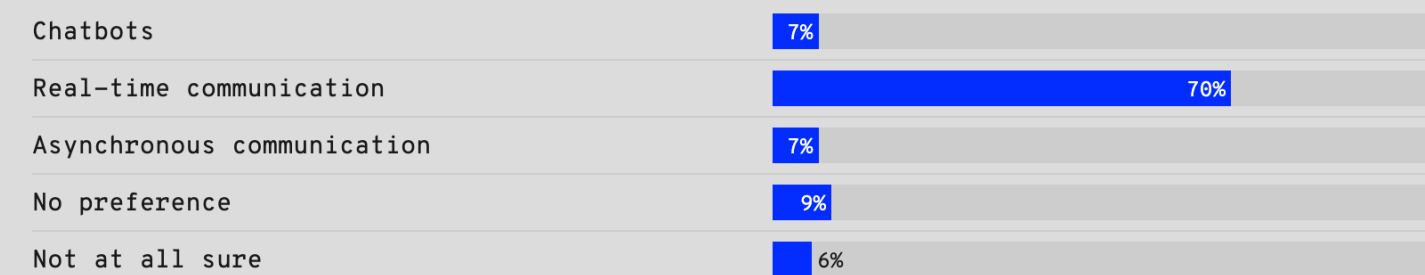
Topic:

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

Introduction:

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

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



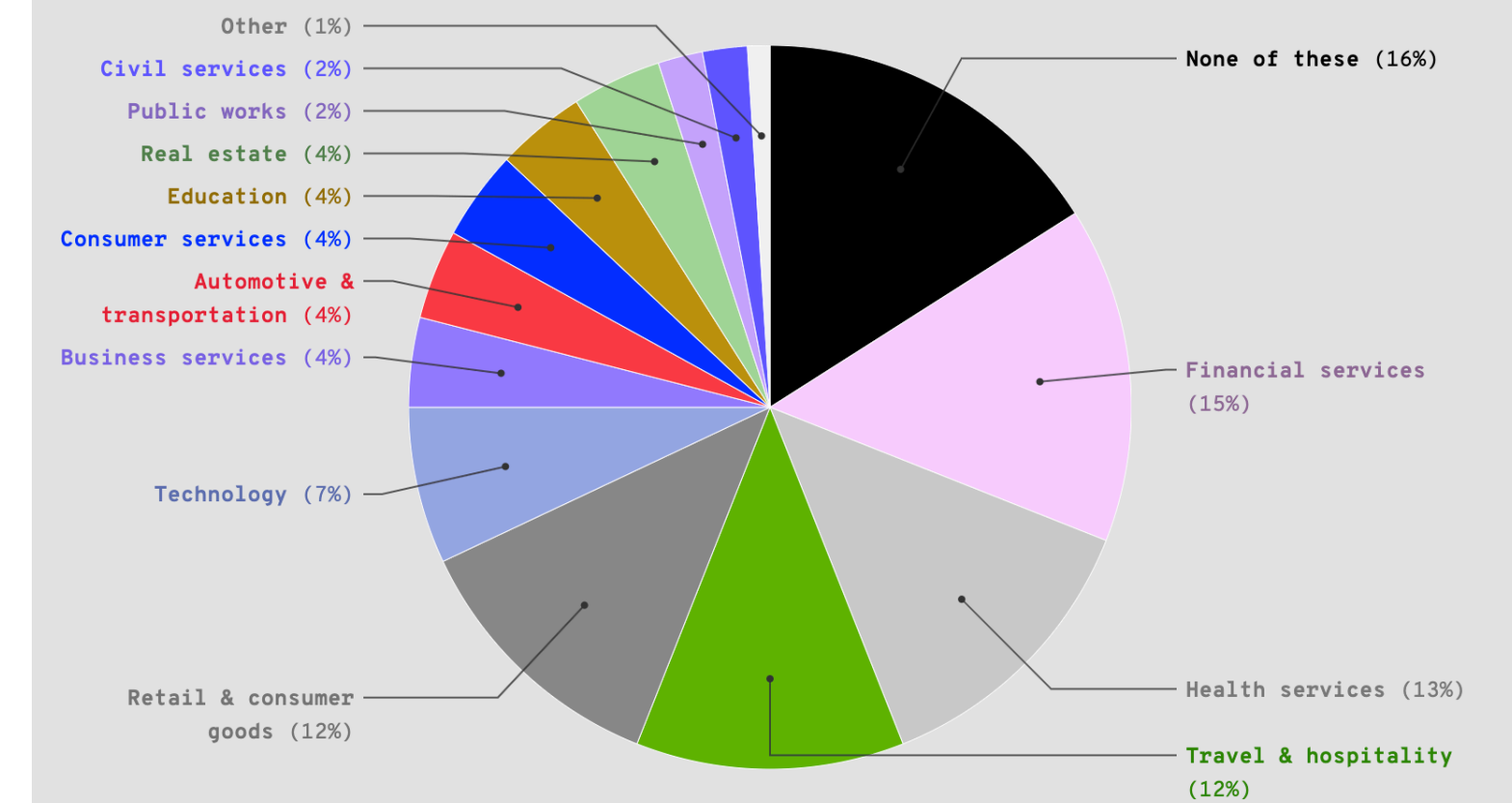
Source: Harris Poll • Created with Datawrapper

protocol

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

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

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



Source: Harris Poll • Created with Datawrapper

protocol

Implication:

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

Section:

04

Topic:

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

Introduction:

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

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

Implication:

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

Section:

05

Topic:

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

Introduction:

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

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

Implication:

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

Section:

06

Topic:

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

Introduction:

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

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

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

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

Implication:

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

Questions?

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