

# COVID-19 CONSUMER RESEARCH WAVE 155 EXECUTIVE SUMMARY

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JULY 21-23, 2023

**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 155

## WAVE 155 INTRODUCTION

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The following research was conducted between **July 21-23, 2023** by The Harris Poll. Fielded among a nationally representative sample of **2,053** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

Topic:

## BARBIE'S DEEPER MEANING

Introduction:

Back in April, [with Marketing Brew](#), we found Americans excited to see a beloved brand on the big screen. And this weekend's box office numbers [report](#) Greta Gerwig's Barbie raking in about \$155 million domestically and \$182 million internationally. So why is Barbie having a cultural moment?



- Sure, nostalgia is part of it: The Harris Poll [found](#) (57%) of Americans say thinking about the past makes them less stressed about today. With Mondelez, [we saw](#) that most Gen Zers were buying nostalgic snacks from their childhood during the pandemic, and our data shows that Nintendo's brand equity saw a [substantial jump](#) in response to the latest iteration of their Mario Kart franchise.

- On Wednesdays, we wear pink: The popularity of groups of pink-clothed friends at the theaters for the [Fashion Event of the Season](#) is the perfect example of how many Americans (74%, Millennials/women: 78%) are seeking out experiences that they can do with friends and family, according to our data.
- Don't Be So Emotional: Previous Harris research found that (62%) of Americans become emotionally attached to the experiences that bring them joy – regardless of gender (women: 63%, men: 61%).
- Be the leader you seek: Remember, Barbie [went to the moon](#) (1965) before women were allowed credit cards (1974), inspiring young girls to reach for the stars. Our Milken Institute-Harris Poll 2023 Listening Project [found](#) that 4 in 5 (82%) young working women seek to be a new kind of leader that doesn't resemble the ones we have today.
- And take control of your life: Just as Barbie looked beyond Barbie World, our State of Women report [with theSkimm](#) found Millennial women today are actively seeking out ways to build the lives they want (89%) – something that feels very personal when watching on a big screen.



- Mattel Inc. CEO and Chairman Ynon Kreiz discussed new leadership values in a Milken panel I moderated.

Implication:

"An obvious lesson from the gargantuan success of both 'Barbie' and the [Taylor Swift] Eras Tour is that there is a huge, underserved market for entertainment that takes the feelings of girls and women seriously," N.Y. Times opinion columnist Michelle Goldberg [wrote](#). And Harris Poll CSO and Managing Director Abbey Lunney discuss in their newsletter, [The Next Big Think!](#) We should move away from the binaries of Barbie v. Oppenheimer, Blue v. Red, Female v. Male, etc., and aspire to create space for consensus building, introducing a more inclusive era.

Section:

# 02

**Topic:**

## RETAILERS SKIMP ON RETURNS: SHIPPO-HARRIS POLL

**Introduction:**

Last year, we found that (51%) of Americans noticed quality issues in customer service. And in our latest poll with Shippo, [Yahoo](#), and [RetailWire](#), retailers are making it harder to return items:

- Nearly three-quarters (72%) who have made online purchase returns in the past 12 months have noticed retailers making online purchase returns more difficult over that period.
- And more than half (54%) have felt blindsided by a retailer changing their online purchase return policy – such as only allowing exchanges or store credit, charging a fee to return products, shrinking the return window, and only allowing in-person returns.
- The cost of returns is forcing companies to change policies: "Some estimates peg the cost of returns to the seller at 66% of the original item's price," Shippo [has stated](#). And this cost, combined with the high return rates, has led some companies to believe that dissuading returns is the best solution to save money, but "that strategy may be a mistake.
- However, consumers are ready to walk: 4 in 5 (80%) shoppers say if an online retailer they regularly purchase from made their return policy more complex, they would buy from a different retailer with a more favorable return policy instead.

**Implication:**

It's about brand loyalty in the end. More and more shoppers are noticing that brands are changing their return policies and are unhappy about it. Companies may think that losing out on money because of returns is a huge problem, but they might end up doing more damage to their reputation by making hasty changes.

Section:

# 03

**Topic:**

## THE SUSTAINABILITY SLUMP: UNIVERSITY OF PITTSBURGH-HARRIS POLL

**Introduction:**

While many companies talk the talk of sustainability, claiming to be integrating environmental and societal concerns into their business models, in our poll with the Center for Sustainable Business at the University of Pittsburgh [in MIT Sloan Management Review](#), far fewer walk the walk.

- Less than one-third of U.S. employees reported that their organizations engage in practices that embed sustainability goals in business models and employee roles.
- And fewer than 3 in 10 employees strongly agreed that their company has a clear business case for improving their sustainability performance (29%) and that sustainability is core to how their company executes their business strategy (27%).
- The barriers to sustainability are widespread: Over 2 in 5 (43%) employees consistently cited short-term focus, a lack of investor interest, and, importantly, "our leaders don't believe in sustainability" as challenges.

- However, it's not just employers: Only a quarter (28%) strongly agreed that the employees at their company take ownership of improving sustainability performance, with nearly half (45%) identifying the employee belief that "sustainability is someone else's responsibility" as a challenge to sustainability progress.

**Implication:**

While companies need to invest more resources into embedding sustainability – and get the entire organization to conduct business through the sustainability lens—employees are questioning leadership's commitment. And leaders will also need to be honest with their progress, as recent research [with Google Cloud](#) found that nearly 6 in 10 executives (59%) admitted to overstating – or inaccurately representing – their sustainability activities.

Section:

# 04

**Topic:**

## WORKPLACE TRAINING FAILS YOUNGER WORKERS: AICPA & CIMA-HARRIS POLL

**Introduction:**

In new Harris research with [AICPA & CIMA](#), as featured in [Forbes](#), business leaders need to do more to empower future leaders in sustaining ethical workplace cultures.

- Nearly (90%) of U.S. and U.K. employees said they were familiar with their company's code of ethics, and (71%) said they received ethics training.
- But only (26%) of future talent – those aged 20 to 30 pursuing an advanced degree, looking for work, or working for less than ten years – found it "very effective," vs. (48%) of business leaders.
- And while 1 in 3 younger workers had faced an ethical dilemma at work, just (24%) of them felt "very prepared" to handle it.
- It's another failure toward younger workers: Last summer [with Bloomberg](#), we found that half (49%) of Gen Z new workers and interns said they felt their training and onboarding could have been done better.

**Implication:**

Businesses must also reframe training to be more engaging and impactful and to ensure managers are prepared to help employees navigate ethical dilemmas. Normalizing discussions about your company's code of conduct is also a must, especially when [Harris Poll-Hue's research](#) found that 1 in 4 BIPOC report that they have felt unable to speak out against discrimination they've experienced or witnessed based on race/ethnicity.



# Questions?

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