

# COVID-19 CONSUMER RESEARCH WAVE 88 EXECUTIVE SUMMARY

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December 3 - 5, 2021

**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 88

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## WAVE 88 INTRODUCTION

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The following research was conducted between **December 3 - 5, 2021** by The Harris Poll. Fielded among a nationally representative sample of **2,042** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

Topic:

## META YOUTH: YOUNG AMERICANS ARE READY FOR THE METAVERSE

Introduction:

Millions of dollars are pouring into real estate within the metaverse, as reported last week by [The New York Times](#) and [Wall Street Journal](#). Yet, our latest data shows that while most Americans (58%) don't even understand what these digital realms are, young Americans are showing the most interest. Here's what we found:

- **Young Americans, 40 and under, are leading us into the metaverse:** 7 in 10 (70%) Gen Z and Millennials are interested in interacting within the metaverse (vs 32% over 40) - and they are most likely to understand the idea of what it entails (64% under 40 v. 27% over 40).
- **Brand experiences are among top 3 reasons that young Americans want to explore the metaverse:** Driving interest are social interaction and virtual meetups (83%), playing virtual games (85%), and visiting virtual stores and brand experiences (81%).
- **Millennials are interested in scratching their travel and shopping itch virtually:** Close to 9 in 10 Millennials interested express desire of 'visiting new worlds or visiting sites around the world (e.g., Eiffel Tower)' (86%) and "purchasing clothes, art and similar goods" (87%).
- Young Americans interested in the metaverse are **turning to the metaverse to actualize their real-estate desires** (74%), led by (77%) of Millennials who are the most likely to be contemplating buying virtual real estate,

- **Millennials are more bullish on the future of the Metaverse than Gen Z:** Close to half of Millennials (48%) believe "the metaverse is the next big thing and will become part of our lives in the next decade," while only (38%) of Gen Z are this bullish.

Implication:

The metaverse may become the most over-hyped term in the next year, but there are plenty of signals that it isn't just another bubble that marketers experienced in the early aughts. With the success of companies like Roblox, young Americans often care more about their virtual identity than their physical. And as a way of escaping pandemic life, we may have an equation for a new third place that can thrive.



Section:

# 02

Topic:

## FEAR OF OMICRON HEATS UP AHEAD OF THE HOLIDAYS

Introduction:

According to our weekly polling, public awareness of the new Omicron variant has increased 14 percentage points from 64% last week to 78% today, and many are concerned for what it may bring. Here are the latest updates:

- **Move over, Delta:** Of those familiar with Omicron, seven-in-ten (70%) are more worried about it than Delta, and concern is greater among younger generations (Gen Z: 81% and Millennials: 77% vs. Gen X: 67%, Boomers: 65%).
- While three-quarters **(75%) of those vaccinated are more worried about Omicron**, only half (50%) of those unvaccinated feel the same - and (22%) are much less worried.
- Americans don't see Omicron as being overhyped: 72% of those aware are concerned that **it could be more contagious and severe as well as evade vaccines** than other variants (Vaccinated: 76%, Unvaccinated: 53%).
- **Masks are back:** While 35% of Americans say they already practice strict COVID health measures, over half (56%) **plan to resume precautions** such as wearing masks indoors and social distancing again (30%), avoiding high-risk places like sporting events and concerts (27%), getting a booster (25%), and limiting their indoor activities like shopping and going to the gym (22%).
- As of this Monday, the U.S. began requiring all international travelers to provide proof of a negative test within a day of their flight - a policy that **38% believe is the most or second most important of eight measures** in managing the pandemic and preventing any new variants from entering.

Implication:

Although there are still a lot of unknowns with the Omicron variant, public concern about its potential health and economic impacts are high -- a fear we know all too well; our polling indicates disruption ahead for holiday travel, shopping and gatherings.



Section:

# 03

Topic:

## EMPLOYERS BEWARE - 23% OF AMERICAN WORKERS ARE PLANNING TO QUIT IN THE NEXT 12 MONTHS: CAREERARC- HARRIS POLL

Introduction:

If employers were hoping 2022 would make it easier for them to find staff, our latest survey in partnership with CareerArc, will put a damper on that. As covered by [Fast Company](#), the data suggests that The Great Resignation is only about to heat up. Let's take a look:

- **NYE Resignations:** Close to a quarter (23%) of employed Americans plan to quit their jobs in the next 12 months - with 70% looking to quit before February 2022 and 36% planning to quit before the new year.

- Among those wanting to quit within the next year, close to six-in-ten (59%) either already are or will begin job searching between now and February. However, one-in-ten (11%) **plan to quit and have no plans of looking for a new job.**
- The top three reasons for quitting are wanting **better working conditions** (32%), **feeling burnt out** (30%), and desiring **higher pay** (29%).
- As for **who is quitting**, younger employees (ages 18-34) are more than twice as likely as older employees (ages 35-64) to say they plan to resign from their jobs in the next 12 months (34% vs. 15%).

Implication:

According to Jim Bramante, Chairman and CEO at CareerArc, "Companies need to get serious about building a strong employer brand to support their recruitment and retention strategy. Employer authenticity, action, and brand reputation have never been more critical and organizations that act quickly have an immense opportunity to get an 'unfair' share of top talent as part of The Great Rehire."



Section:

# 04

Topic:

## WHAT RETAILERS SHOULD GIVE MILLENNIAL AND GEN Z WOMEN FOR THE HOLIDAYS: AD AGE-HARRIS POLL

Introduction:

In our latest survey in partnership with [Ad Age](#), we found that women - particularly Millennials and Gen Z - are bringing new priorities and expectations to the sales counter. With more than four-in-ten (44%) Gen Z and Millennial women ready to shop to make up for missed time, retailers should take notice. Here's what we found:

- **Spending with intention:** More than 7 in 10 Gen Z and Millennial women are trying to shop at local businesses more often, and 39% of Gen Z and 43% of Millennials say they want to spend their money with companies that support small businesses.
- Further, more than 2 in 5 women under 40 want to buy from companies that use a percentage of their **profits to help local communities**.
- **Ready to shop elsewhere:** Women are standing up for employees, as 47% of Gen Z of 44% of Millennial women say that they **will not support retailers** that make their employees work on holidays.
- Nearly 2 in 5 women under 40 say they're looking forward to **shopping with friends and family again**, while another one-third say that they look forward to **pairing shopping with another fun activity**.

- **Lean into in-person experiences:** Friendly sales experts (29%) and food and beverage offerings (29%) were the leading ways to appeal to women consumers as **online bots and algorithms can't replace human interaction after all**.

Implication:

Women are thinking of their communities more, both in terms of local businesses and the people who work in stores; they are ready to escape COVID's gloomy shadow; and most importantly, they want to enjoy themselves.



Section:

# 05

Topic:

## REFRAMING PUBLIC SAFETY REFORM TO FIND COMMON GROUND: MACARTHUR FOUNDATION- HARRIS POLL

Introduction:

The Harris Poll teamed up with the [MacArthur Foundation](#) to see how Chicagoans' perspective on public safety in their city has changed since we first checked in in March 2021. Here's what else we found:

- Chicagoans continue to **perceive a decline in local race relations**: 78% disagree that race relations in their city are good right now, and (71%) disagree that race relations have improved. Nearly two-thirds (63%) say **race-related issues are systemic** in nature.
- Residents report high levels of concern about the personal safety of marginalized communities such as the homeless (85%), residents of color (83%), and those with mental or behavioral health conditions (87%).
- Further, more than half (57%) report **gun violence is the most important problem in Chicago** (up from 50% in the spring), and background checks (65%), higher penalties for gun-related crimes (64%), and police presence in areas with high gun violence (58%) are desired by those who believe gun violence needs to be reduced (Spring: 63%, 60%, and 55%, respectively).

- While 60% of residents disagree that funding for the Chicago Police Department is too high, 73% say there should **be more funding for non-policing alternatives** (e.g., social workers on police force) and **sensitivity training for all officers** (56%).
- Yet, in police encounters, more people of all demographics report negative experiences (23% of all residents, 37% of people of color) or being racially profiled (33% of residents of color).

Implication:

Attitudes towards solutions addressing these issues are nuanced and divided along racial, socioeconomic, and generation lines as well as lived experiences. Even so, Chicagoans still desire changes to the laws, systems, and organizations that contribute to and help prevent the violent crime plaguing the city.



# Questions?

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**KNOWLEDGE IS POWER**

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