

COVID-19 CONSUMER RESEARCH WAVE 97 EXECUTIVE SUMMARY

February 18 - 20, 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 97

WAVE 97 INTRODUCTION

The following research was conducted between **February 18 - 20, 2022** by The Harris Poll. Fielded among a nationally representative sample of **2,033** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

AMERICA'S RAPID - YET UNEQUAL - PANDEMIC OFF- RAMP: AXIOS- HARRIS POLL

Introduction:

America is accelerating toward a return to pre-pandemic life, though millions of people aren't yet comfortable abandoning pandemic precautions - or they feel downright threatened by the rapid reversal according to [our latest survey with Axios](#).

- **Driving the news:** Businesses and policymakers across the country are removing mask and vaccine mandates, loosening COVID protocols and encouraging more in-person interaction.
- However, just over half (55%) said they **agreed that it's the right time** for states to begin lifting their indoor mask mandates, with Republicans much more likely to agree than Democrats.
- **Plenty will be masking anyways:** Three-quarters said they'll keep their masks on if the public majority voluntarily does, and 70% said they'll wear a mask if they don't know whether the people around them are vaccinated.
- Continued masking may be in part to 71% of Americans that believe that COVID-19 is now a part of daily life and will last in some form (v. 29% remaining hopeful it will become eradicated).

Implication:

Employers are also dropping mask mandates and, in some cases, setting return-to-work dates, [AP reports](#). However, based on other Harris surveys, companies [will need to follow best practices](#) and understand who does - and does not - want to be back in the office full time.

Section:

02

Topic:

THE UNEQUAL RETURN TO THE OFFICE: AXIOS- HARRIS POLL

Introduction:

In [our latest survey with Axios](#), we found that women and People of Color are generally happier working from home and are likelier than their white male colleagues to want to continue working remotely.

- Just over half (52%) of women say they enjoy working remotely and would like to do so in the long term, compared with 41% of men.
- Only 15% of women say working in person allows for more camaraderie among colleagues, compared with one-quarter (25%) of men.
- Over half (52%) of Black workers and 50% of women say working from home is better than working in the office **when it comes to advancing in their careers**, compared with 42% of men.
- Three-fifths (63%) of Black workers and 58% of women say they **feel more ambitious when working from home versus the office**. Just 46% of men feel the same way.
- And when asked about their anxieties over returning to offices, 47% of women of color say they **worry about having to dress for work**, compared with 31% of men.

Implication:

"It's output over office politics," says John Gerzema, CEO of the Harris Poll. "It's the theater of the office that is often alienating women workers, workers of color, women of color...and I think what you're seeing from this data is that COVID, perhaps accidentally, has very much liberated workers, particularly women and BIPOC workers."

Section:

03

Topic:

ANTI-UNION STANCES CAN AFFECT BRAND SENTIMENT: MORNING BREW- HARRIS POLL

Introduction:

Across industries and job titles, many workers around the U.S. – a [Starbucks store](#), an [REI store in Manhattan](#), tech workers at [The New York Times](#) – have been coming together to fight for better working conditions. And they may have the public on their side according to our latest data [in partnership with Morning Brew](#).

- Seven in 10 (71%) Americans believe that more service-industry companies should have employee unions.
- That belief has the **potential to impact purchasing behavior**, as 42% reported being **less likely to shop** with a company that is trying to **stop its employees from unionizing**, and 41% said the same of a company with a **union on strike**.
- And those numbers are even higher among Gen Z.
- Beyond that, (29%) of Americans would be more likely to purchase from a brand with unionized employees, including (41%) of Millennials and (32%) of Gen Z.

Implication:

“We’re seeing an overall move in power, a shift in power from the C-suite to the E-suite, the employee suite,” according to Linda Ong, founder and CEO of Cultique. “People recognize that worker rights are important because everybody is reassessing the role of work in their lives anyway.”

Section:

04

Topic:

PANDEMIC WORSENING AMERICANS' ALREADY TERRIBLE SLEEP: HEALTHDAY- HARRIS POLL

Introduction:

Many Americans are bone-weary following two straight years of pandemic stress, and our latest data in partnership with HealthDay and [as covered by U.S. News](#) shows that sleeplessness is only part of the problem. Here's what else we found:

- One-third of Americans **feel more tired now** than they did before March 2020, the start of the COVID-19 pandemic.
- But just 28% say they're getting less sleep than before the pandemic.
- About 60% agree that they often **feel mentally tired** even when they haven't been physically active.
- A similar number (57%) say they can't sleep well because they have too much on their minds, while about half (49%) say they are often too anxious to sleep well.

- This weariness is probably driven by pandemic-related changes causing a **lack of separation between work and home life that can be fatiguing**, according to Michelle Drerup, director of the Cleveland Clinic's Behavioral Sleep Medicine Program.

Implication:

"There's a gap there that basically says tiredness is not just driven by sleep," said Kathy Steinberg, vice president at The Harris Poll, with our poll pointing to deeper anxieties and stresses in the American psyche that are causing fatigue and harming sleep.

Section:

05

Topic:

BRAND BOWL 2022: SECOND ANNUAL INDEX ON THE BIG GAME'S AD IMPACT

Introduction:

Using Harris Brand Platform data, our [second annual Brand Bowl report](#) measured the impact of Super Bowl commercials on advertisers' brand equity scores. Here's what we found:

- **WeatherTech, Disney+, and General Motors** saw the **greatest lifts in overall brand equity** after the Big Game.
- **Thirty brands made their Super Bowl debut.** Notable wins include: Wallbox (+4.4 purchase consideration), Irish Spring (+6.0 perceived quality), Bud Light Seltzer Hard Soda (+10.1 brand familiarity).
- Super Bowl LVI ads were full of cryptocurrency platforms, electric vehicles, and sportsbook brands, resulting in mixed consumer reactions.
- Our **Ad Recall Tracker** ranked the top 16 brands with the highest ad recall rates. **Amazon Alexa** (39.6%) and **Avocados from Mexico** (39.0%) led the pack.
- This year's viewers saw a **higher percentage of comedic ads** (63%), and a **lower percentage of heartfelt ads** (13%) than in the prior two Super Bowls.

Implication:

As the most watched televised event of the year, Super Bowl advertisers stand to greatly increase their brand awareness and equity. However, brand tactics must align with changing consumer tastes to make a positive impact on advertisers' biggest night.

Questions?

RYAN LINDER

Global Chief Marketing Officer, EVP, Stagwell

ryan.linder@stagwellglobal.com

JOHN GERZEMA

CEO, The Harris Poll

jgerzema@harrisinsights.com



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