Horizon Media National Social Isolation Barometer

Week of June 15

Horizon Media’s National Social Isolation Barometer began on March 26, 2020. It is designed to measure the feelings of isolation among Americans during the stay-at-home orders to help stop the spread of COVID-19. Each day 1,000 people are interviewed; to date over 93,000 interviews have been completed. In week 12 of our analysis, interest in protests and unrest have begun to shift to a refocus on COVID concerns. We also dive into how cities have been handling continued protests and rising cases in COVID.

Headlines

• Attention is divided between racial injustice protests and a new wave of COVID cases
• Americans in large cities are much more likely to still be focused on protesting, as COVID is primarily appearing in areas of the country that have remained relatively untouched until now
• While restrictions are currently loosening, the looming fear of a return to lock-down keeps feelings of isolation at the forefront of people’s minds

Client Implications:

• Americans are balancing their concerns about a resurgence of COVID along with their desire to take a stand on racial injustice. In this context people have rising expectations about how brands should respond. Brands have some of the largest social voices in today’s culture and people seek out brands that align with their personal values. Companies that do not have a clearly articulated set of values that drive their actions will likely be challenged in navigating a world in which they will called upon to take a stand.

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As we enter the third week of mass protests across the US, the number of people going out and speaking against racial injustice has only grown. Many brands saw explosive attention given to their statements and stances on racial injustice. Yet, while brands continue to see short term high engagement on these kinds of statements, the focus was not sustained and there has been a general shift among Americans from the protests to COVID concerns.

Changes in feelings of restriction and isolation indicate fear of the virus is distracting Americans from the racial injustice conversation. Last week’s protests clearly illustrated that people were feeling less restricted and a little less isolated than in weeks past. This week, people are coming down from their protest high and new fears of COVID flaring back up are rising. We suspect that conversation around COVID continues to remain flat due to a lack of focus in the media and that fact that the experience of the pandemic is more diffuse compared to the more focused and driven experience of the racial justice movement.
A resurgence in COVID cases has driven a leveling off of both feelings of restriction and isolation. The resurgence in COVID cases is centered in areas of the Midwest and South where they are running out of hospital beds and supplies to care for the ill similar to what happened in coastal cities like New York and LA. Other states are also experiencing increases. Texas has seen record numbers of hospitalizations. Florida has decided to continue to push forward with opening the state even though in the last few days the COVID death toll has surpassed 3000 people. These factors have all combined to push back against the sense of freedom and connection from the protests.
Free To Do What I Want Any Old Time

Amid the peak of the BLM protests over the past few weeks there was a significant decline in feelings of restriction, especially in areas that saw some of the most fervent demonstrations – e.g. Minneapolis, Chicago, New York, and LA. However, even as the protests begin to calm down feelings of restriction in those areas continue to decline despite fears of a looming second wave of pandemic cases and threats of subsequent lockdown. What this suggests is that feelings of freedom are very of the moment. Regardless of what’s ahead, the fact that people are unrestricted in the moment is what’s going to shape their perspective.
Somewhat surprisingly, we see these feelings of freedom play out even more strongly in areas where we expect to see the most significant spikes in cases, such as Houston, Miami and Phoenix. It remains to be seen if these optimistic feelings of freedom hold steady once we consider headlines released earlier this week that more starkly outline the trend of continuing infection.
Preemptive Loneliness

While feelings of restriction continue to fall, feelings of isolation remain relatively unchanged. This seeming paradox may be underscoring the internal ambivalence people feel about their day-to-day lives. Yes, they’re allowed to more freely go about their lives now. Yes, they’re fired up about civil rights and the initial successes they’re seeing in the protests. But in addition to that, they’re also seeing the narrative shift. They’re seeing COVID cases spiking across the country, they’re seeing predictions of a forthcoming second wave. With the lockdowns still fresh in their mind, they’re seeing concerns of a possible return to quarantine. So, even though many restrictions are currently loosening, the looming fear of a return to lock-down keeps those familiar feelings of isolation always at the forefront of people’s minds.
In fact, areas that are expected to see the most severe resurgence in COVID cases are also showing the strongest feeling of isolation. This is true even though those areas have tended to be the ones that were most open and allowed for relatively looser requirements as it pertains to isolation.
These seemingly ever-present feelings of isolation align with recent research conducted by the University of Chicago. The researchers found that Americans overall feel more unhappy now than at any point in the past 50 years.

Contact WHY Group for More Information

As the COVID pandemic runs up against other social and cultural issues, determining how to proceed from a business standpoint becomes increasingly complex and fraught and understanding changes in the perception of freedom and isolation is essential. These perceptions create the context into which client engagement plans will be received. If you’re interested in getting additional data or learnings from the Barometer reach out to your WHY contact.