

COVID-19 CONSUMER RESEARCH WAVE 75 EXECUTIVE SUMMARY

September 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 75

WAVE 75 INTRODUCTION

The following research was conducted between **September 3 - 5, 2021** 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:

THE NEW BLACK MARKET: FAKE VACCINE CARDS

Introduction:

From restaurants to concerts to gyms, proof of vaccination mandates are being introduced across the country. Rather than skipping or receiving the shot, some unvaccinated Americans are turning to a surging black market to buy fraudulent CDC vaccination cards. We check in with Americans to learn how aware they are of this new black market:

- Less than half (48%) of **Americans have heard about fake CDC vaccine cards being sold on the black market**, with (59%) of Gen Z being aware vs. only (42%) of Boomers.
- Most (70%) are **concerned about people using them to masquerade as vaccinated**, including (83%) of Gen Z and (73%) of Millennials vs. (66%) Gen X and Boomers.
- While only (16%) of Americans **know someone who has purchased a fake CDC vaccination card**, nearly one-third (31%) of Millennials know someone who has vs. only (2%) of Boomers. Perhaps younger generations are more aware of black market due to their popularity at [music festivals and other major events](#).
- **Ripple effect on trust:** less than half (47%) say they trust the screening and verification process for places that require attendees to be vaccinated knowing that fake CDC vaccine cards exist.
- Support is high (65%) for **digital “vaccine passports” to be used instead**, in which the person’s vaccination status is verified by third parties such as public health agencies.
- [The New York Times profiles](#) “@AntiVaxMomma” - a woman charged with selling hundreds of fake COVID-19 vaccine cards over Instagram.

Implication:

Businesses will need to be vigilant in enforcing vaccine requirement safety measures in order to maintain the trust of patrons as people look to return to normal and attend crowded places again.

Section:

02

Topic:

THE LONG-TERM IMPACT OF VIRTUAL LEARNING: A 3- PRONGED CRISIS

Introduction:

Students, parents, and teachers alike are bracing for another uncertain school year amid COVID-19 as more than 1,400 schools across 278 districts in 35 states that began the academic year in person [have already closed](#). As the void of in-person schooling continues to grow, we took a deep dive into the long-term impact of virtual learning on students, indicating a looming three-pronged crisis of social, mental, and academic health of students.

- The majority of Americans say in-person learning is **critical to the development of students' social health** (88%), but after over a year without, a similar number of Americans (85%) worry about **the lack of social emotional intelligence and social skills development in young people**.
- Strong majorities also say in-person learning is **critical to the development of emotional** (87%) **and mental health** (86%) of students, which helps explain why (84%) worry about **higher rates of anxiety and depression among young people** as a result of long-term virtual school.
- Many also worry about **loss of learning** (85%), **lower student outcomes** (84%) and worsening inequality across race, gender, income, geography, and people with disabilities (72%). For instance, roughly (40%) of schools that closed for a period of time did so without any remote learning plan in place, [according to Burbio](#).

- **Can we regain lost ground?** Over three quarters say it **will be difficult to reverse negative impacts** of learning loss (80%), social emotional intelligence (79%), mental health of young people (79%), and worsening inequality (76%) due to lack of in-person schooling.

Implication:

In-person learning has irreplaceable benefits to students' skills development and holistic wellbeing. Given the uncertain future with COVID, hybrid or new kinds of virtual learning models that create more face-to-face interaction and engagement will be critical to ensure students don't fall any further behind.

Section:

03

Topic:

SECRET VAXXERS: THESE AMERICANS ARE GETTING COVID VACCINATIONS BUT NOT TELLING ANYONE: USA TODAY-HARRIS POLL

Introduction:

While many Americans publicly announced their vaccination on social media, other Americans are taking the opposite approach: they're getting COVID-19 vaccinations but not telling their anti-vaxxer friends, family, or colleagues, fearing alienation from the people around them. We partnered [with USA Today](#) to look more into these "secret vaxxers." Here's what we found:

- Almost all (91%) of Americans who got vaccinated in the first few months of the immunization campaign **are willing to tell anyone.**
- And just one in 10 (11%) of vaccinated Americans are keeping it private from some people, while an additional (6%) **are not telling anyone.**

- **But that would not be the case for those who are still refusing the shots** - more than one-third (36%) of unvaccinated Americans said that if they did decide to get the jab, they wouldn't tell anyone.
- However, a quarter (26%) of Americans said their **vaccination status could cause friction in their relationships.**

Americans hiding vaccine status

About 1 in 6 Americans aren't telling everyone whether they got a COVID-19 vaccination, because some fear alienating family, friends and colleagues.



SOURCE Harris poll of 1,263 vaccinated Americans, Aug. 27-29

Implication:

The quintessential human desire to be liked and loved explains why many people don't want to get publicly vaccinated. In many communities, vaccine hesitancy is orthodox and betraying your peers for many is too much of a social risk to take on.

Section:

04

Topic:

AMERICANS STILL EAGER TO SHOP IN PERSON POST-PANDEMIC: MORNING BREW-HARRIS POLL

Introduction:

A year into the pandemic, and just as vaccines were rolling out in March, we wanted to know how shopping habits changed and what would stick in the “After Times.” Now, with the rise of the Delta variant, we wanted to see if the optimism is still there. Here’s what we found in our latest poll in partnership with [Morning Brew](#):

- Three in five (63%) of Americans will do **most of the shopping in person a year from now**, compared with (37%) who said they’d do their shopping online. The split was (43%) in-person and (24%) for online in our previous poll.
- **The Delta variant could stymie traffic to malls and department stores** - as less than half (43%) of shoppers go to those locations. But that’s up from (32%) in March.
- Three-quarters (76%) of shoppers **loaded up on cleaning supplies last year**, compared with (63%) now.
- **Is the price right?** Nearly half of Americans (47%) say they are much or somewhat more sensitive to prices because of the pandemic.

Implication:

Notably, (44%) of respondents said they’re neither more nor less sensitive to price changes, but we wonder if they do care about shrinking package sizes - another way CPG companies raise prices.

Section:

05

Topic:

MOST AMERICANS ARE COMFORTABLE RETURNING TO THE OFFICE REGARDLESS OF COWORKERS' VACCINATION STATUS: FORTUNE-HARRIS POLL

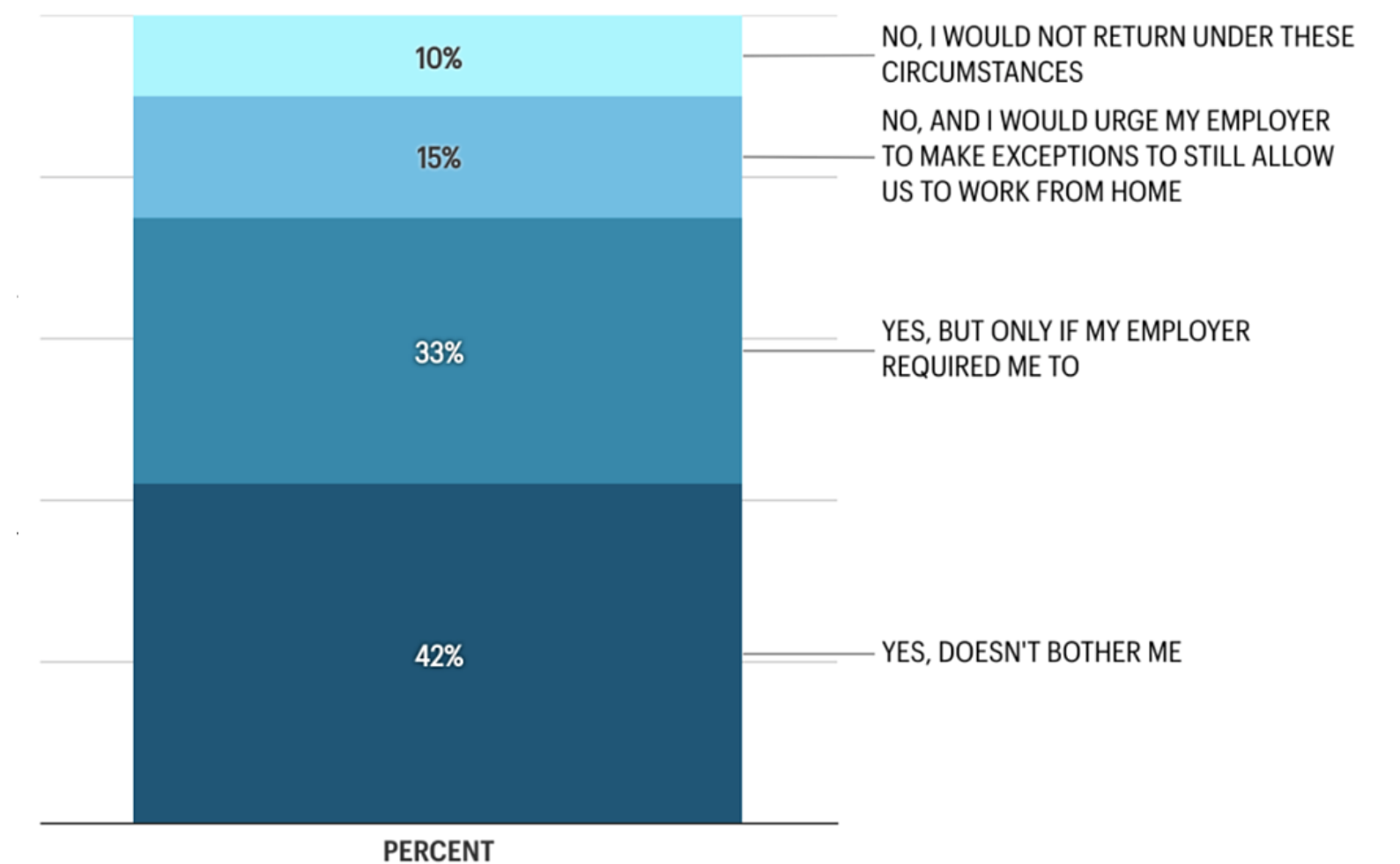
Introduction:

About (64%) of U.S. adults are vaccinated, but when it comes to return-to-the-office plans, workers say vaccine status doesn't matter that much. [In partnership with Fortune](#), we asked workers how they feel about working alongside unvaccinated coworkers. Here is what we found:

- Three-quarters (72%) of working Americans are currently comfortable returning to work.
- Nearly three-fifths (58%) of workers say they're comfortable returning to work **even if some of their coworkers are unvaccinated**.
- Four in 10 workers (42%) say **it doesn't bother them if some employees remain unvaccinated**, while a third (33%) say they would **return to the office with unvaccinated coworkers only if their employer required it**. A quarter (25%) say they would not return under these conditions.

- Most (83%) workers say they'd **feel safer at work if companies required all employees to wear masks**. Nearly three-fifths (58%) say they were planning to wear a mask if they went back to work in-person.

Would you return to the office if some employees were unvaccinated?



DATA BASED ON SURVEY OF 1,124 U.S. WORKERS FIELDIED IN AUGUST 2021.

SOURCE: THE HARRIS POLL

FORTUNE

Implication:

Working in-person doesn't always require mandatory vaccines in order to ensure the comfortability of workers as long as other precautions are taken and concerns are acknowledged. Employers will need to carefully navigate the coexistence of their vaccinated and unvaccinated workers as they look to keep employees safe.

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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