

COVID-19 CONSUMER RESEARCH WAVE 77 EXECUTIVE SUMMARY

September 17 - 19, 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 77

WAVE 77 INTRODUCTION

The following research was conducted between **September 17 - 19, 2021** by The Harris Poll. Fielded among a nationally representative sample of **2,055** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

01

Topic:

HALF OF VACCINATED AMERICANS MIGHT NOT SPEND THE HOLIDAYS WITH UNVACCINATED FAMILY AND FRIENDS: FORBES-HARRIS POLL

Introduction:

Americans' vaccination status against COVID-19 is likely to influence how they spend the holidays this year, according to our new Harris Poll [covered exclusively in Forbes](#).

- Half (50%) of vaccinated respondents are either “extremely” or “considerably” **hesitant to spend the holidays with unvaccinated** family members or friends. Only (38%) said they were not hesitant about making holiday plans with the unvaccinated, while (12%) said it’s a non-issue because all their family and friends have gotten the shot.

- **Family & Friend COVID Mandates:** Half (50%) had been asked by family or friends they’ve traveled to see to take precautions like mask-wearing, social distancing and providing proof of vaccination, of which (95%) complied with at least to a certain extent. A larger share of (62%) said they would ask the same of their family or friends if they were visiting for a gathering or event.
- **No mask, no vaccine? You might be uninvited:** Over a third (36%) of vaccinated Americans said that they **would uninvite family/friends if they did not want to take the precautions** and another (27%) said “maybe but wouldn’t want to risk the relationship.”
- A further (42%) of vaccinated respondents also said they had **canceled at least one event or existing travel plan** they had with people because they were unvaccinated.

Implication:

“Our new data suggests the vaccine divide is not only reshaping relationships, but soon the holiday travel season,” Harris Poll CEO John Gerzema said, noting vaccinated Americans are “placing stricter boundaries around who they choose to spend time with. So expect to see cancellations and rerouted plans as vaccinated Americans avoid their unvaccinated friends and family.”

Section:

02

Topic:

EMPLOYER MANDATED VACCINES SETTING OUT TO DRIVE DEEPER DIVISION AND BACKLASH FOR COMPANIES CAUGHT IN THE CROSS-HAIRS

Introduction:

Since President Biden announced new federal vaccine requirements for as many as 100 million Americans — private-sector employees as well as health care workers and federal contractors - [reaction has ranged](#) from full support to protests and outrage. Here is what Americans think about the mandate:

- Overall, (55%) of all Americans support the employer mandated vaccine and (45%) oppose it. **But much deeper divisions exist:** (68%) of vaccinated Americans support the mandate vs just (23%) of those unvaccinated. And while (76%) of Democrats support the mandate, only (39%) of Republicans do.

- **Who do those in opposition of the mandate blame?** Half (50%) blame both the government and the companies who are implementing the vaccine mandate. But more onus is on the government as (38%) blame the government alone and (13%) blame companies alone.
- **More backlash ahead for employers:** (50%) of those in opposition of the mandate say “companies should go against the mandate, stand by their values and respect the personal liberties of their employees” another (35%) say “It’s not their fault but they should at least try do something and speak out against the mandate”
- Little forgiveness: only (16%) say “It’s not their fault they are being forced to implement the mandate, there is nothing they can do.”
- [ABC looks at](#) how employers should navigate the vaccine mandate rollout.

Implication:

The pandemic has made employee safety and retention opposing forces. Where mandated policies to keep employees safe are the exact thing pushing some employees away: (45%) of Americans told us they would likely look elsewhere if their employer mandated requiring all employees be vaccinated to maintain employment. Balancing both safety and retention will be the tightrope companies must walk in coming months.

Section:

03

Topic:

STREAMING ADS WILL PLAY A BIG ROLE IN HOLIDAY SHOPPING: ROKU- HARRIS POLL

Introduction:

Streaming is changing the way people shop, according to our annual survey with Roku released last week which found that streaming services are beating out traditional TV for US shoppers' attention. [Morning Brew](#) dives into the details and [download the full report](#).

- The **gap between time spent streaming versus watching linear TV per week is growing fast**. Whereas streaming beat linear by 12 minutes in 2020, that number is 78 minutes this year.
- Half (49%) of consumers have seen an ad while streaming that caused them to pause and shop for the product online. For millennials, that figure is (71%).
- Consumers plan to spend an average of \$938 on gift shopping, up (5%) from last year, while (36%) plan to spend more this holiday season than they did last year.

Implication:

Dallas Lawrence, head of communications for Roku's platform business, says marketers are starting to shift their media budgets to "buy TV the way their target consumers are watching TV."

Section:

04

Topic:

NOW IS THE TIME TO ADDRESS INCOME INEQUALITY: MACARTHUR FOUNDATION- HARRIS POLL

Introduction:

There's a festering sense that others are getting a better deal when it comes to pandemic help, a [MacArthur Foundation and Harris Poll survey of Chicagoans finds](#). While the pandemic now seems far from over, the questions it has raised around economic equity must be addressed now to set the city up for a brighter post-pandemic future.

- While neighborhood-level response to the pandemic has largely been seen as successful, a majority of city residents (54%) believe **their neighborhood has been negatively impacted**.
- More than 1 in 5 Chicago-area residents (21%) **sought emergency food supplies during the pandemic**, and significant numbers of area residents also sought mortgage or utility assistance (15%) and loan forgiveness or payment pauses (15%).

- Many Chicago residents cannot shake the sense that **their communities are neglected**. More than half (52%) said their neighborhoods are overlooked when government agencies, businesses and other groups make local investments.

Implication:

These problems remain in early stages, however, and our survey illuminates three solutions leaders can use to nip these problems in the bud: meet Chicagoans' where they are and understand how concerns differ; understand and apply the right solutions; and better communicate how city leadership will act on these solutions.

Section:

05

Topic:

THE KEY TO GROWTH IN HIGHLY REGULATED INDUSTRIES: FYLLO-HARRIS POLL

Introduction:

From cannabis to financial services, the constant tension of new regulations and compliance requirements in highly regulated industries creates significant drag on business momentum, innovation, and enterprise resources. [In partnership with Fyllo](#), we polled compliance leaders to examine why leading with compliance is key to growth. Here's what we found:

- **Compliance is a key to unlocking growth:** Over 6 in 10 companies cite compliance/regulations (63%) as a big barrier to achieving their goals.
- **Compliance is an enterprise issue:** While (82%) of compliance leaders report their legal, regulatory, and government affairs departments are impacted by compliance issues, these issues also impact IT (49%), Marketing (25%), accounting (23%) production (21%), and HR (20%).
- **The only certainty is uncertainty:** COVID showed business leaders they must be prepared to deal with the unexpected change. Only (39%) agree "My company can adapt quickly to sudden changes in its regulatory or compliance environment due to the COVID-19 pandemic."

- **Facing a compliance gap that tech can fill:** Many companies are working with the knowledge that they don't fully understand the entire compliance landscape. Six in ten (60%) agree that "The dynamic nature of regulations often makes me question the status of my company's compliance."

Implication:

Companies that succeed in highly regulated industries look at compliance management as a strategic advantage rather than an operational expense, streamlining their movement through the regulatory landscape and bolstering their confidence in new pursuits.

Questions?

RYAN LINDER

Global Chief Marketing Officer, EVP, Stagwell

ryan.linder@stagwellglobal.com

JOHN GERZEMA

CEO, The Harris Poll

jgerzema@harrisinsights.com



KNOWLEDGE IS POWER
