

# COVID-19 CONSUMER RESEARCH WAVE 79 EXECUTIVE SUMMARY

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October 1 - 3, 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 79

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## WAVE 79 INTRODUCTION

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The following research was conducted between **October 1 - 3, 2021** by The Harris Poll. Fielded among a nationally representative sample of **2,039** U.S. adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

**Topic:**

## NAVIGATING RELIGIOUS EXEMPTIONS

**Introduction:**

As employers across the country implement vaccine requirements, some Americans are looking for exemptions on religious grounds. So what do Americans think about those looking for religious exemptions to getting a COVID-19 vaccine? Here's what we found:

- **Are They Legitimate?:** Nearly half (48%) say **religious exemptions are a legitimate reason to not be vaccinated**; including three-fifths (59%) of religious Americans and 43% of vaccinated Americans.
- **Personal Choice or Dogma?:** Two-thirds (65%) agree **“A person's right to ask for religious exemption for the COVID vaccine is a personal choice, regardless if their religious leaders are in favor of vaccination”** - including 72% of Millennials vs only 59% of Boomers.
- **But some major religions are not in agreement:** Last week, [The Vatican ordered](#) all employees to be vaccinated and does not currently allow exemptions. [And the LDS Church](#) told public officials to not approve religious exemptions for its members.
- **Religion in the Workplace:** Nearly three-fifths (58%) of Americans agree **“Employers should respect and accept an employee's religious exemption request without question.”**
- Even though Americans are supportive of exemptions, two-thirds (65%) say **most people asking for religious exemptions are just saying it** to get out of being vaccinated.
- **Take Andrew Wiggins:** the NBA star's religious exemption request was denied by league officials, leading to Wiggins getting the shot. [As he put it](#), his options were “to get vaccinated or not play in the NBA.”

**Implication:**

Employers have a difficult task of navigating legitimate concerns for religious reasons versus those who are simply looking for an excuse and will need to balance privacy and boundaries. [NPR looks at](#) how employers are navigating the difficult position of granting religious exemptions to an increasing number of workers asking for them.

Section:

# 02

Topic:

## THE FRACTURED CHILDCARE SYSTEM: YAHOO FINANCE-HARRIS POLL

Introduction:

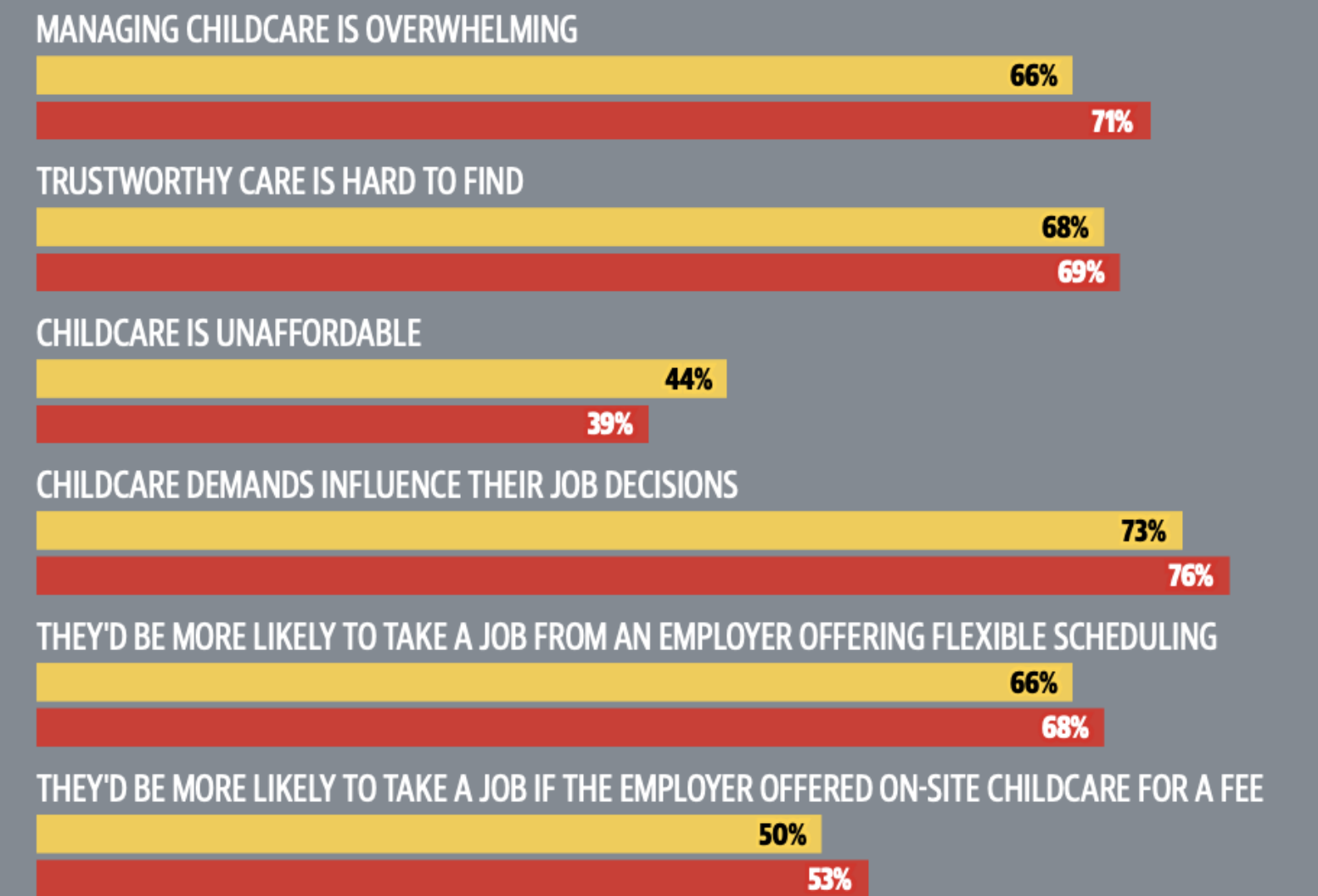
In a recent survey with [Yahoo Finance](#), we surveyed working parents with children under the age of 18 to see how current childcare options influence their current employment situation. Here's what we found:

- Nearly three quarters (71%) of working parents with kids under 18 say managing childcare decisions **is overwhelming**.
- What's more, three-quarters (76%) of working parents agree that their child(ren)'s childcare needs are **very influential on their current employment situation**, such as employment status, choice of employer, and hours or availability: 67% of moms and 79% of dads agree.
- Two-thirds (68%) percent of working parents said they would be more likely to accept an offer of employment from an employer that **offers flexible scheduling for childcare needs**, with another (62%) saying they would be more likely to accept based on **the offer of a monthly child care stipend**.
- Three in five (62%) of working parents said they would be more likely to accept an **offer of employment based on free onsite daycare**. Comparatively, only about half (53%) said they would be more likely to accept the offer **if onsite daycare was offered for a fee**.
- [The LA Times](#) writes more about the woes of childcare in the U.S. after the September Treasury Department report was released.

## STRESSING OUT OVER KIDS AND JOBS

PERCENTAGE WHO SAY:

● ALL PARENTS ● WORKING PARENTS



SOURCE: YAHOO FINANCE - HARRIS POLL OF 1,066 ADULTS CONDUCTED SEPT. 17-20, 2021. THE SUBSET OF PARENTS NUMBERED 300, WHILE THE SUBSET OF WORKING PARENTS NUMBERED 220.

[yahoo/finance](#)  
The Harris Poll

Implication:

The childcare crisis in the U.S. is disproportionately affecting [working moms](#), and companies should work on filling the widening gap of lack of childcare services and perks offered in order to get workers back in the market.

Section:

# 03

**Topic:**

## VACCINATED AMERICANS ARE READY FOR THEIR BOOSTERS

**Introduction:**

In our latest wave of the COVID Tracker, we check back in with vaccinated Americans now that booster shots are recommended for certain at-risk cohorts. Here is what Americans are thinking:

- **Likelihood of vaccinated Americans to get a booster shot remains high:** As noted in our [Axios](#) story, vaccinated Americans are on board with booster shots: 84% say they are likely to get one once it becomes available to them (61% very likely, 23% somewhat likely).
- More than two-thirds (68%) of those likely to get a booster shot say they would be very or somewhat comfortable **getting a booster shot that was made by a different manufacturer than their initial dose** if U.S. health officials said it was okay to mix brands.
- **Younger Americans are significantly more likely to be comfortable with hypothetically mixing vaccine manufacturers:** 85% of vaccinated Millennials and 75% of vaccinated Gen Zers agree, compared to just 55% of Boomers.
- Among vaccinated Americans who are not likely to get a booster shot (16%), four-in-ten (43%) say they **don't think a booster is necessary in general**, while 29% say they feel like **they've already built up immunity from the initial vaccination**.

**Implication:**

Many vaccinated Americans [are still concerned about breakthrough cases](#) and boosters will be a potent weapon in bolstering consumer confidence to return to social activities such as travel, large events, and dining out.

Section:

# 04

Topic:

## PERSONAL VALUES AND THE WORKPLACE: INTEGRAL-HARRIS POLL

Introduction:

The Harris Poll partnered with Integral to conduct a survey among employed Americans to better understand the perceptions about varied societal and political topics and how well organizations were making a difference on those values. The full [Integral Employee Activation Index](#) can be downloaded for further insight. Here are a few key insights:

- **A positive daily mindset:** Two-fifths of employees whose organization reflects their personal values say they feel confident (43%) or grateful (41%) compared to just (11%) who say they are tired - or under-appreciated (5%).
- **Driving positive actions:** Four in five (83%) employees say they feel like the alignment of values with their employer makes them want to stay through challenging times, or go the extra mile (82%).
- **Cultivating company culture:** Alignment of personal beliefs with one's company also leads to positive feelings towards company culture with nearly half (47%) saying their colleagues felt supportive, (40%) safe, and (36%) purposeful.

When an employee feels their organization reflects their values it drives their positive actions on behalf of the employer.

Employees across generations, identities, genders, and United States locations felt their colleagues were twice as likely to be a strong advocate for their employer if the organization reflected their personal values.

When employee personal values are aligned with employer values the correlate to positive actions on behalf of the organization.



Implication:

A deeper understanding of employees across a variety of factors will help organizations gauge employee values and sentiment which can be used to more accurately map business decisions and communications to drive employee actions, perceptions, and engagement.



Section:

# 05

Topic:

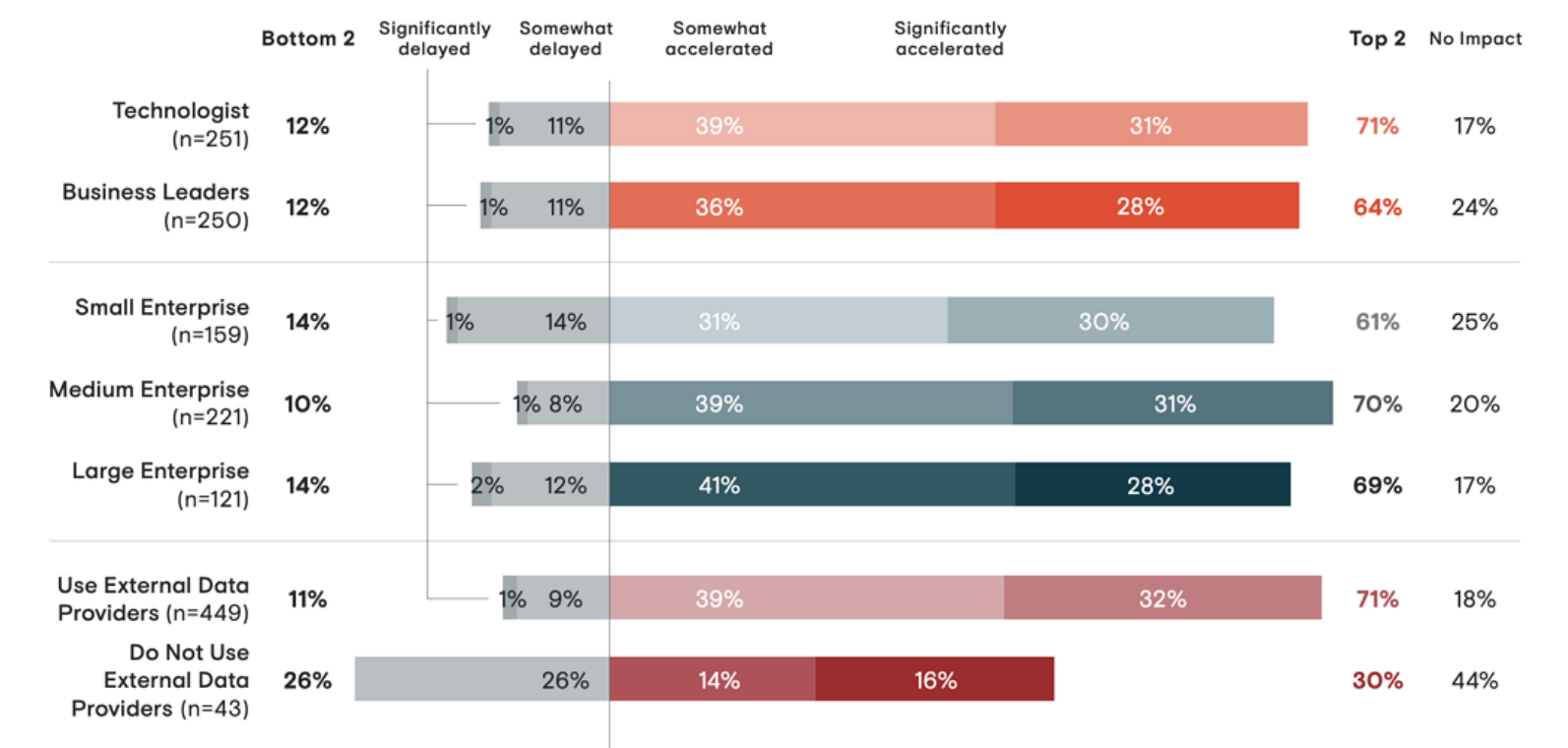
## AI: THE LEADER OF DIGITAL TRANSFORMATION: APPEN-HARRIS POLL

Introduction:

The Harris Poll partnered with [Appen](#) on a survey to provide insights for the 7th edition of their annual [State of AI](#) report that explores the strategies employed by companies in successfully deploying AI. Here are some key takeaways:

- **AI budgets have increased:** Budgets from \$500k to \$5M have increased by 55% year-over-year, with only a quarter (26%) reporting budgets under \$500k, signaling broader market maturity.
- An overwhelming majority of organizations have **partnered with external training data providers to deploy and update AI projects at scale**, including 90% of small, 92% of medium, and 85% of large enterprises.
- Companies report a **high commitment to data security and privacy** with 91% of companies who use external data providers reporting good or excellent ratings for their companies when it comes to addressing privacy or security issues related to AI.
- Enterprises of all sizes confirmed **they accelerated their AI strategy as a result of COVID-19 in 2020** and 61% of small, 70% of medium, and 69% of large enterprises saying they will **continue to do so in 2021**.
- [Harvard Business Review](#) writes more on our study with Appen.

Figure 24: What extent do you foresee COVID impacting your AI strategy in 2021?



Implication:

The AI industry continues to grow rapidly year-over-year, to the point where organizations that haven't yet invested in their own AI initiatives are at risk of being left behind.

# Questions?

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**KNOWLEDGE IS POWER**

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