Company Reputation amid COVID-19 and Black Lives Matter: Data from The Harris Poll

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Weathering the Storm of the Three Crises: Health, Economic and Social
The Task For Business Leaders: Lifting The Curtain of Fear

54% thought national fear was irrational

Fear of dying
27%

Fear ventilator shortage
74%
Amount who are not leaving their home because of COVID19

Fear of losing their job
56%

Fear global recession
84%

Trended Fear Curves During COVID19

Fear leaving home for essential errands
80%

Fear returning to public activity
73%

Fear of new wave
79%
81%
82%

76% now think national fear is sensible

Wave Change

58% +5
52% +1

Fear ventilator shortage
74%

Fear global recession
84%

Fear leaving home for essential errands
80%

Fear returning to public activity
73%

Fear of new wave
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80%

Fear returning to public activity
73%

Fear of new wave
79%
81%
82%

76% now think national fear is sensible

Wave Change

58% +5
52% +1
**The Harris Poll: COVID-19 in the U.S.**

Americans Say Economic Impact Will Have a Bigger Effect Personally than the Virus Itself

Which do you think will have a bigger effect on you and your family?

- 62% Coronavirus/COVID-19 itself
- 38% The economic impacts of the coronavirus pandemic

As a result of the current pandemic, have you or your household been impacted financially in any of the following ways?

- 37% I have been impacted financially in some other way
- 32% Stopped or cut back on other savings
- 30% Lost income partially
- 29% Provided financial support for a family member
- 27% Stopped or cut back on retirement savings
- 25% Accumulated more debt than normal

86% Have been impacted financially

Source: Harris Poll COVID19 Tracker Wave 19

BASE: GENERAL PUBLIC W19 (1957)

LI01 Which do you think will have a bigger effect on the life of you and your family?

EMP05 As a result of the current pandemic, have you or your household been impacted financially in any of the following ways?

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And Over a Third Expect Lower Income in 2020 and One-Quarter Are Seeking New Sources

Do you think your income in 2020 will be lower, higher or about the same as it was in 2019?

- Lower: 36%
- About the same: 44%
- Higher: 20%

32% have sought out new/additional sources of income

- Female: 29%
- Male: 35%
- Gen Z/Mill: 39%
- Gen X: 40%
- Boomer: 28%
- Seniors: 18%
- HHI <$50k: 33%
- HHI $50-$99k: 30%
- HHI $100k+: 34%

*Statistically Significant Difference
We Are Experiencing a Mix of Emotions During the Pandemic

Have you felt any of the following recently due to the COVID-19 pandemic?

- *Especially Parents!*

Source: Harris Poll COVID19 Tracker Wave 19
BASE: GENERAL PUBLIC W19 (1957)
FR01 Have you felt any of the following recently due to the COVID-19 pandemic?
Majority Say Lockdowns Were Effective, but Many Are Concerned about a New Wave

How effective do you think the lockdowns (e.g., closing of non-essential business and stay-home orders) were in your area? % Effective

- W16 (6/13-15): 77%
- W18 (6/26-29): 80%

How concerned are you of a new wave of COVID-19 outbreak in your area?

- General Public: 19% Concerned, 81% Not Concerned (W16 6/15: 79%)
- Rural: 22% Concerned, 78% Not Concerned (W16 6/15: 71%)
- Suburban: 20% Concerned, 80% Not Concerned (W16 6/15: 77%)
- Urban: 15% Concerned, 85% Not Concerned (W16 6/15: 85%)
- Texas: 20% Concerned, 80% Not Concerned
- North Carolina: 19% Concerned, 81% Not Concerned
- California: 19% Concerned, 81% Not Concerned
- Arizona: 13% Concerned, 87% Not Concerned
If there was a surge of cases of COVID-19 in your state, would you support or oppose another lock down/a lock down?

<table>
<thead>
<tr>
<th>Region</th>
<th>W16 (6/13-15)</th>
<th>W18 (6/26-29)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arizona</td>
<td>71% (29%)</td>
<td>75% (25%)</td>
</tr>
<tr>
<td>California</td>
<td>76% (24%)</td>
<td>70% (30%)</td>
</tr>
<tr>
<td>North Carolina</td>
<td>75% (25%)</td>
<td>76% (24%)</td>
</tr>
<tr>
<td>Texas</td>
<td>81% (19%)</td>
<td>72% (28%)</td>
</tr>
<tr>
<td>Urban</td>
<td>74% (26%)</td>
<td>81% (19%)</td>
</tr>
<tr>
<td>Rural</td>
<td>62% (38%)</td>
<td>87% (13%)</td>
</tr>
<tr>
<td>Suburban</td>
<td>76% (24%)</td>
<td>75% (25%)</td>
</tr>
</tbody>
</table>

Source: Harris Poll COVID19 Tracker W16
BASE: GENERAL PUBLIC W16 (1963); Urban (637); Rural (913); Suburban (413); GOP (679); Dem (671); ARIZONA (116); CALIFORNIA (290); NORTH CAROLINA (162); TEXAS (290)
COV05 If there was a surge of cases of COVID-19 in your state, would you support or oppose another lock down/a lock down?
But Willingness To Sacrifice for Mandated Restrictions Is Starting To Wane Across The Country

Would you obey the following mandated restrictions?

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>No international travel</td>
<td>94%</td>
<td>91%</td>
<td>92%</td>
</tr>
<tr>
<td>Staying 6 feet apart from others at all times</td>
<td>94%</td>
<td>91%</td>
<td>92%</td>
</tr>
<tr>
<td>Convening with groups no larger than 10 people</td>
<td>89%</td>
<td>87%</td>
<td>84%</td>
</tr>
<tr>
<td>No dining in bars and restaurants</td>
<td>93%</td>
<td>92%</td>
<td>83%</td>
</tr>
<tr>
<td>Non-essential workers to stay home</td>
<td>92%</td>
<td>91%</td>
<td>80%</td>
</tr>
</tbody>
</table>
THE HARRIS POLL: COVID-19 IN THE U.S.

Consumer Confidence Correlates with Distance and Familiarity

Once the government provides information that the spread of the virus is flattening how long will it take you to do each of the following?

- Immediately/1-30 days
- up to 3 months
- up to 6 months
- 1 year or longer

(Six Months To Normalcy On Avg.)

- Go to the office: 79% immediately, 9% up to 1 year
- Go out to dinner: 74% immediately, 12% up to 1 year
- Go to a gym class: 60% immediately, 28% up to 1 year
- Take public transportation (e.g., subway, busses, trains): 57% immediately, 25% up to 1 year
- Stay in a hotel: 60% immediately, 24% up to 1 year
- Host/attend a large social gathering: 56% immediately, 23% up to 1 year
- Greet people with a handshake: 57% immediately, 21% up to 1 year
- Go to the movies: 50% immediately, 29% up to 1 year
- Visit a casino: 48% immediately, 31% up to 1 year
- Go to a sporting event: 50% immediately, 29% up to 1 year
- Fly on a plane: 47% immediately, 19% up to 1 year
- Take a cruise: 35% immediately, 37% up to 1 year

Source: Harris Poll COVID19 Tracker Wave 19
BASE: GENERAL PUBLIC W19 (1957)
Q33B Once the government provides information that the spread of the virus is flattening how long will it take you to do each of the following?

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THE HARRIS POLL: COVID-19 IN THE U.S.

However, Americans Want Their Life Back

How much would you say you miss each of the following during this time of virus-related shutdowns?

% A lot/Somewhat

<table>
<thead>
<tr>
<th>Activity</th>
<th>% A lot/Somewhat</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gatherings with friends and family</td>
<td>76%</td>
</tr>
<tr>
<td>Dining out at a restaurant/bar</td>
<td>71%</td>
</tr>
<tr>
<td>Shopping in stores</td>
<td>66%</td>
</tr>
<tr>
<td>In person celebrations (e.g., Easter, birthdays, graduations)</td>
<td>68%</td>
</tr>
<tr>
<td>Going to a social gathering</td>
<td>62%</td>
</tr>
<tr>
<td>Attending events like concerts, theatre and sporting events</td>
<td>52%</td>
</tr>
<tr>
<td>Going to church</td>
<td>51%</td>
</tr>
<tr>
<td>Going to a movie theatre</td>
<td>49%</td>
</tr>
<tr>
<td>Watching sports on TV</td>
<td>46%</td>
</tr>
<tr>
<td>Going to my local coffee shop</td>
<td>46%</td>
</tr>
<tr>
<td>Traveling on an airplane</td>
<td>43%</td>
</tr>
<tr>
<td>Going to the gym/work out class</td>
<td>41%</td>
</tr>
<tr>
<td>Working from the office</td>
<td>33%</td>
</tr>
<tr>
<td>Going to school or university</td>
<td>32%</td>
</tr>
</tbody>
</table>

Source: Harris Poll COVID19 Tracker Wave 19
BASE: GENERAL PUBLIC W19 (1957)
FR05 How much would you say you miss each of the following during this time of virus-related shutdowns?
Harris Insights & Analytics LLC, A Stagwell Company © 2020
And Pent-Up Demand is Building Across Categories (‘Revenge Spending’)

Major Purchases Planned Once Things Return To Normal

- Going on vacation / travelling: 39% (Wave 19: 24%)  
  - Wave 19 (July 4)
- Buying new clothes: 34% (Wave 5: 19%)
- Buying gifts for my friends / family: 21% (Wave 5: 12%)
- Buying new household goods, furniture or appliances: 23% (Wave 5: 17%)
- Buying a car: 21% (Wave 5: 11%)
- Attending a concert or sporting event: 16% (Wave 5: 12%)
- Not planning a purchase: 51%
Returning To Life As it Was Before Feels Less Realistic; COVID-19 is Permanently Changing ‘Normal’

Once the pandemic is over, what do you think will be very different, somewhat different or mostly the same? (% saying ‘mostly the same’ after COVID-19)
And Americans say the Pandemic Has Exacerbated Society’s Most Devastating Inequalities

<table>
<thead>
<tr>
<th>Issue</th>
<th>Made the issue worse</th>
<th>No change</th>
<th>Improved the issue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poverty</td>
<td>65%</td>
<td>22%</td>
<td>13%</td>
</tr>
<tr>
<td>Job creation</td>
<td>64%</td>
<td>20%</td>
<td>16%</td>
</tr>
<tr>
<td>Hunger</td>
<td>62%</td>
<td>23%</td>
<td>15%</td>
</tr>
<tr>
<td>Education</td>
<td>60%</td>
<td>25%</td>
<td>14%</td>
</tr>
<tr>
<td>Domestic violence</td>
<td>55%</td>
<td>29%</td>
<td>16%</td>
</tr>
<tr>
<td>Access to healthcare</td>
<td>49%</td>
<td>27%</td>
<td>23%</td>
</tr>
<tr>
<td>Drug addiction</td>
<td>46%</td>
<td>38%</td>
<td>16%</td>
</tr>
<tr>
<td>Good health and well being</td>
<td>46%</td>
<td>23%</td>
<td>31%</td>
</tr>
<tr>
<td>Immigration</td>
<td>34%</td>
<td>44%</td>
<td>22%</td>
</tr>
<tr>
<td>Data privacy</td>
<td>32%</td>
<td>51%</td>
<td>17%</td>
</tr>
<tr>
<td>Racial equality</td>
<td>30%</td>
<td>54%</td>
<td>16%</td>
</tr>
<tr>
<td>Gun violence</td>
<td>30%</td>
<td>49%</td>
<td>21%</td>
</tr>
<tr>
<td>Supporting veterans</td>
<td>26%</td>
<td>50%</td>
<td>24%</td>
</tr>
<tr>
<td>Sexual harassment</td>
<td>25%</td>
<td>58%</td>
<td>17%</td>
</tr>
<tr>
<td>Environmental efforts</td>
<td>24%</td>
<td>40%</td>
<td>35%</td>
</tr>
<tr>
<td>Gender equality</td>
<td>17%</td>
<td>67%</td>
<td>15%</td>
</tr>
<tr>
<td>Climate change</td>
<td>17%</td>
<td>46%</td>
<td>37%</td>
</tr>
<tr>
<td>LGBTQ rights</td>
<td>15%</td>
<td>73%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Source: Harris Poll COVID19 Tracker Wave 13
BASE: GENERAL PUBLIC (2032)

WAL11 How do you think the pandemic has impacted the following issues?

Harris Insights & Analytics LLC, A Seguin Company © 2020
### Thinking about your life moving forward, how important are the following issues to you personally?

<table>
<thead>
<tr>
<th>Issue</th>
<th>Important</th>
<th>Not important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Good health and well being</td>
<td>91%</td>
<td>9%</td>
</tr>
<tr>
<td>Access to healthcare</td>
<td>91%</td>
<td>9%</td>
</tr>
<tr>
<td>Data privacy</td>
<td>88%</td>
<td>12%</td>
</tr>
<tr>
<td>Supporting small business</td>
<td>87%</td>
<td>13%</td>
</tr>
<tr>
<td>Supporting veterans</td>
<td>86%</td>
<td>14%</td>
</tr>
<tr>
<td>Job creation</td>
<td>85%</td>
<td>15%</td>
</tr>
<tr>
<td>Education</td>
<td>85%</td>
<td>15%</td>
</tr>
<tr>
<td>Hunger</td>
<td>84%</td>
<td>16%</td>
</tr>
<tr>
<td>Poverty</td>
<td>82%</td>
<td>18%</td>
</tr>
<tr>
<td>Environmental efforts</td>
<td>80%</td>
<td>20%</td>
</tr>
<tr>
<td>Racial equality</td>
<td>77%</td>
<td>23%</td>
</tr>
<tr>
<td>Gun violence</td>
<td>77%</td>
<td>23%</td>
</tr>
<tr>
<td>Domestic violence</td>
<td>76%</td>
<td>24%</td>
</tr>
<tr>
<td>Climate change</td>
<td>75%</td>
<td>25%</td>
</tr>
<tr>
<td>Sexual harassment</td>
<td>73%</td>
<td>27%</td>
</tr>
<tr>
<td>Gender equality</td>
<td>73%</td>
<td>27%</td>
</tr>
<tr>
<td>Immigration</td>
<td>69%</td>
<td>31%</td>
</tr>
<tr>
<td>Drug addiction</td>
<td>68%</td>
<td>32%</td>
</tr>
<tr>
<td>LGBTQ rights</td>
<td>56%</td>
<td>44%</td>
</tr>
</tbody>
</table>

Source: Harris Poll COVID19 Tracker Wave 13
BASE: GENERAL PUBLIC (2032)
WAL12 Thinking about your life moving forward, how important are the following issues to you personally?
Critically, Americans Agree That This Time “Feels Different” in the Movement for Racial Equality

Would you say you agree or disagree that this moment in the racial equality movement “feels different” than it has in the past?

- **Agree**: 25%
- **Disagree**: 75%

**Source:** Harris Poll COVID19 Tracker Wave 15

**BASE:** GENERAL PUBLIC W15 (1969); GEN Z/MILL (673); GEN X (545); BOOMER (410); SENIOR (65+); DEM (691); GOP (651); WHITE (1486); BLACK (191)

**RC4:** Would you say you agree or disagree that this moment in the racial equality movement “feels different” than it has in the past?

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Where We Are:
The Cycle of Responding, Re-Calibrating and Restarting

How we have changed and what we still need to overcome…
In The Last Crisis, Companies Were Part of The Problem …

**Select Industry Reputation Trends (% Positive Reputation; 5, 6, or 7 on a 7-point scale)**

- **FINANCIAL CRISIS**
  - 80% Retail Grocery
  - 71% Technology
  - 66% Consumer Products
  - 64% Manufacturing
  - 64% Automotive
  - 62% Health insurance
  - 60% Pharmaceutical
  - 43% Government
  - 21% Tobacco

- **CORONAVIRUS**
  - 80% Retail Grocery
  - 71% Technology
  - 66% Consumer Products
  - 64% Manufacturing
  - 64% Automotive
  - 62% Health insurance
  - 60% Pharmaceutical
  - 58% Financial Services
  - 43% Government
  - 21% Tobacco

**% Change Jan – May 2020**
- 80% Retail Grocery: +7
- 71% Technology: -4
- 66% Consumer Products: +3
- 64% Manufacturing: +6
- 64% Automotive: +3
- 62% Health insurance: +28
- 60% Pharmaceutical: +20
- 58% Financial Services: +10
- 43% Government: +18
- 21% Tobacco: +5

Base: All gen pop respondents (Jan: n=25,880, Apr: n=1,039) Q1314. For this question, we’d like you to think about industries in general. How would you rate the overall reputation of the following industries, where “1” means the industry has a “Very Bad” reputation and “7” means the industry has a “Very Good” reputation?
THE HARRIS POLL: COVID-19 IN THE U.S.

This Time, Companies Are Part of The Solution

How would you rate the overall reputation of the following industries?

% Positive Reputation (Top 3 on 7-point scale)

<table>
<thead>
<tr>
<th>Industry</th>
<th>Jan-20</th>
<th>May-20</th>
<th>20-Apr</th>
<th>GAP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pharma</td>
<td>60%</td>
<td>62%</td>
<td>49%</td>
<td>+28</td>
</tr>
<tr>
<td>Health Ins</td>
<td>60%</td>
<td>62%</td>
<td>52%</td>
<td>+28</td>
</tr>
<tr>
<td>Gov't</td>
<td>63%</td>
<td>43%</td>
<td>43%</td>
<td>+18</td>
</tr>
<tr>
<td>Energy</td>
<td>63%</td>
<td>51%</td>
<td>46%</td>
<td>+12</td>
</tr>
<tr>
<td>Media</td>
<td>58%</td>
<td>48%</td>
<td>51%</td>
<td>+11</td>
</tr>
<tr>
<td>Financial Services</td>
<td>80%</td>
<td>73%</td>
<td>61%</td>
<td>+10</td>
</tr>
<tr>
<td>Grocery</td>
<td>67%</td>
<td>61%</td>
<td>63%</td>
<td>+7</td>
</tr>
<tr>
<td>Telecomm</td>
<td>67%</td>
<td>66%</td>
<td>63%</td>
<td>+5</td>
</tr>
<tr>
<td>Retail (Apparel)</td>
<td>64%</td>
<td>66%</td>
<td>61%</td>
<td>+4</td>
</tr>
<tr>
<td>Consumer Products</td>
<td>75%</td>
<td>71%</td>
<td>71%</td>
<td>+3</td>
</tr>
<tr>
<td>Auto</td>
<td>64%</td>
<td>61%</td>
<td>61%</td>
<td>+3</td>
</tr>
<tr>
<td>Technology</td>
<td>71%</td>
<td>80%</td>
<td>80%</td>
<td>-4</td>
</tr>
<tr>
<td>Tobacco</td>
<td>22%</td>
<td>17%</td>
<td>17%</td>
<td>+5</td>
</tr>
</tbody>
</table>

Base: All gen pop respondents (Jan 2020: n=25,880, April 2020: n=3,882) Q1314. For this question, we’d like you to think about industries in general. How would you rate the overall reputation of the following industries, where “1” means the industry has a “Very Bad” reputation and “7” means the industry has a “Very Good” reputation?

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Corporate America Receives An Overall Positive Response to the Pandemic

Do you think that the industry has had a good response or a poor response to the coronavirus pandemic?

- Healthcare (Doctors/Nurses/Hospital): 71% Good Response, 12% Poor Response
- Retail - grocery: 70% Good Response, 14% Poor Response
- Restaurants: 63% Good Response, 18% Poor Response
- Food & Beverage: 62% Good Response, 15% Poor Response
- Retail: 58% Good Response, 17% Poor Response
- Pharmaceutical/drugs: 58% Good Response, 15% Poor Response
- Small Businesses: 57% Good Response, 15% Poor Response
- Technology: 55% Good Response, 13% Poor Response
- Energy and Utilities: 52% Good Response, 14% Poor Response
- Manufacturing: 51% Good Response, 19% Poor Response
- Financial services: 50% Good Response, 15% Poor Response
- Automotive: 50% Good Response, 13% Poor Response
- Entertainment: 49% Good Response, 21% Poor Response
- Media: 46% Good Response, 31% Poor Response
- Travel and hospitality: 45% Good Response, 27% Poor Response
- Oil: 44% Good Response, 16% Poor Response
- Airlines: 42% Good Response, 29% Poor Response
- Real estate: 42% Good Response, 17% Poor Response

Source: Harris Poll COVID19 Tracker Wave 19
BASE: GENERAL PUBLIC W19 (1957)
IND01 Do you think that the industry has had a good response or a poor response to the coronavirus pandemic?
Creating a Resurgence in Positive Industry Impressions Since COVID19

How has your view of each of the following industries changed since the start of the coronavirus pandemic?

- Healthcare (Doctors/Nurses/Hospital): 62% More Positive, 9% More Negative
- Retail - grocery: 48% More Positive, 10% More Negative
- Small Businesses: 47% More Positive, 15% More Negative
- Pharmaceutical/drugs: 39% More Positive, 16% More Negative
- Restaurants: 38% More Positive, 21% More Negative
- Food & Beverage: 39% More Positive, 13% More Negative
- Technology: 42% More Positive, 8% More Negative
- Retail: 32% More Positive, 16% More Negative
- Telecommunications: 36% More Positive, 10% More Negative
- Manufacturing: 32% More Positive, 12% More Negative
- Energy and Utilities: 31% More Positive, 12% More Negative
- Media: 27% More Positive, 12% More Negative
- Financial services: 34% More Positive, 16% More Negative
- Travel and hospitality (hotels, cruise lines): 28% More Positive, 16% More Negative
- Entertainment: 28% More Positive, 19% More Negative
- Automotive: 28% More Positive, 11% More Negative
- Oil: 22% More Positive, 15% More Negative
- Real estate: 22% More Positive, 14% More Negative
- Airlines: 31% More Positive, 14% More Negative

Source: Harris Poll COVID19 Tracker Wave 19
BASE: GENERAL PUBLIC W19 (1957)
How trustworthy do you think each of the following sources are to provide accurate information regarding the coronavirus outbreak?

Summary of Very + Somewhat trustworthy

- Doctors and nurses: 92% trustworthily
- Scientists: 78% trustworthily
- Local county agencies/health departments: 75% trustworthily
- Medical journals: 75% trustworthily
- Friends and family: 74% trustworthily
- CDC: 89% trustworthily
- My local government: 89% trustworthily
- My governor: 79% trustworthily
- International health organizations (e.g., WHO): 79% trustworthily
- Local media: 75% trustworthily
- Government PSA's/website: 80% trustworthily
- National media: 69% trustworthily
- The White House/President: 62% trustworthily

Source: Harris Poll COVID19 Tracker Wave 19
BASE: GENERAL PUBLIC W19 (1957)
Q24. How trustworthy do you think each of the following sources are to provide accurate information regarding the coronavirus outbreak?
Americans Are Willing to Trust Companies With Their Data to Fight the Pandemic

How willing are you to share your personal data and information with companies working to fight the COVID-19 pandemic?

<table>
<thead>
<tr>
<th>Group</th>
<th>Willing</th>
<th>Not Willing</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Public</td>
<td>61%</td>
<td>39%</td>
</tr>
<tr>
<td>Male</td>
<td>63%</td>
<td>37%</td>
</tr>
<tr>
<td>Female</td>
<td>59%</td>
<td>41%</td>
</tr>
<tr>
<td>Gen Z/ Millennial</td>
<td>66%</td>
<td>34%</td>
</tr>
<tr>
<td>Gen X Boomers</td>
<td>70%</td>
<td>30%</td>
</tr>
<tr>
<td>Seniors</td>
<td>52%</td>
<td>48%</td>
</tr>
<tr>
<td>Urban</td>
<td>71%</td>
<td>29%</td>
</tr>
<tr>
<td>Suburban</td>
<td>58%</td>
<td>42%</td>
</tr>
<tr>
<td>Rural</td>
<td>51%</td>
<td>49%</td>
</tr>
<tr>
<td>GOP</td>
<td>56%</td>
<td>44%</td>
</tr>
<tr>
<td>Dem</td>
<td>71%</td>
<td>29%</td>
</tr>
</tbody>
</table>

Source: Harris Poll COVID19 Tracker Wave 13
BASE: GENERAL PUBLIC (2032)
Which of the following industries do you think should provide solutions during the Covid-19 outbreak?

- Healthcare (Doctors/Nurses/Hospital): 52%
- Pharmaceutical/drugs: 47%
- Technology: 31%
- Retail - grocery: 25%
- Restaurants: 24%
- Media: 24%
- Manufacturing: 24%
- Travel and hospitality (hotels, cruise lines): 22%
- Airlines: 22%
- Telecommunications: 21%
- Financial services: 20%
- Small Businesses: 17%
- Retail - apparel: 15%
- Automotive: 14%
- Real estate: 12%

Source: Harris Poll COVID19 Tracker Wave 19
BASE: GENERAL PUBLIC W19 (1957)
Americans Have Awakened to Fundamental Fissures in Society and Corporate Stewardship

The pandemic has exposed underlying structural problems in American society. 85% Agree, 15% disagree.

The pandemic has opened my eyes to acceptable and unacceptable corporate behavior. 80% Agree, 20% disagree.

I will remember the companies that did the right thing by their workers by ensuring their health and safety or doing their best to avoid layoffs.

I will remember the companies that took missteps in their response to the COVID-19 pandemic long after it is over.

Source: Harris Poll/JUST Capital COVID-19 Survey
BASE: ALL QUALIFIED RESPONDENTS (1005)
Q3 How much do you agree or disagree with each of the following statements?
"This is an opportunity for large companies to hit the "reset" button and focus on doing right by their workers, customers, community and the environment."

89% Agree
45%

11% Disagree
9%
2%

Q8 For each of the following pairs of statements, please indicate which statement comes closer to your views. Q3 How much do you agree or disagree with each of the following statements?
Where Companies Can Unite: Right Now, Americans Want Authenticity and Action

What is your opinion of companies who create advertisements about COVID-19?

- 38% I think it is a good thing regardless of actions they have taken, it shows they care
- 26% I think they're just doing it for publicity, most of them feel contrived/forced
- 36% Companies should only advertise if they have taken action to address COVID-19

Generally speaking, what kind of message do you find most meaningful from companies during the COVID-19 pandemic?

- 42% Investing in their local community
- 39% Leverage resources to address COVID-19
- 35% Instill hope and optimism
- 35% How they are supporting small businesses
- 33% Stories of how they're making a difference
- 29% Hire employees locally
- 28% Strengthen struggling companies
- 23% Include coping strategies
- 22% Advocate for causes I care about
- 16% None of the above

Source: Harris Poll COVID19 Tracker W16
BASE: GENERAL PUBLIC W16 (1963)
MED05 What is your opinion of companies who create advertisements about COVID-19?
MT04 Generally speaking, what kind of message do you find most meaningful from companies during the COVID-19 pandemic? Please select all that apply.

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They Want Companies to Underscore Social Policies and Actions in the Context of Growth

How important are each of the following today for corporate America?

- Protecting the health and safety of employees: 87% More Important, 13% Less Important
- Customer service: 81% More Important, 19% Less Important
- Employer/employee relationships: 80% More Important, 20% Less Important
- Taking action for the greater social good: 78% More Important, 22% Less Important
- Transparent supply chain practices: 73% More Important, 27% Less Important
- Corporate role in the communities in which they operate: 73% More Important, 27% Less Important
- Product innovation: 72% More Important, 28% Less Important
- Business strategies prioritizing social performance in addition to finances: 71% More Important, 29% Less Important
- Meaningful communication from the CEO: 69% More Important, 31% Less Important
- Speaking out on social issues: 68% More Important, 32% Less Important
- Authentic messaging on corporate purpose and values: 68% More Important, 32% Less Important
- Stock performance: 62% More Important, 38% Less Important
- Prioritization of both shareholder profit and company purpose: 59% More Important, 41% Less Important
A Majority of Americans Will Pay More to Buy From Brands That Take a Stand

How much do you agree or disagree with each of the following statements?

- I will pay more to buy from brands who take a stand on social issues I care about: 59%
- I will boycott brands that don’t stand for issues I care about: 54%

By demographic:

- DEM: Agree 69%, Disagree 31%
- GOP: Agree 53%, Disagree 47%
- HHI $100K+: Agree 68%, Disagree 32%
- HHI $50-$99k: Agree 54%, Disagree 46%
- HHI < $50K: Agree 54%, Disagree 46%
- Seniors: Agree 39%, Disagree 61%
- Boomers: Agree 49%, Disagree 51%
- Gen X: Agree 70%, Disagree 30%
- Gen Z/Millennial: Agree 72%, Disagree 28%

Source: Harris Poll COVID19 Tracker Wave 19
BASE: GENERAL PUBLIC W19 (1957)
LN01. How much do you agree or disagree with each of the following statements?
A Majority of Americans Say Companies Should Publicly Address BLM and Racial Inequality

Do you believe companies should provide a public statement regarding black lives matter and racial inequality in America?

- **General Public**: Yes 57%, No 43%

- **Black**: 76%
- **White**: 51%
- **Dem**: 77%
- **GOP**: 42%
- **HHI $75k+**: 62%
- **HHI $50k - $75k**: 52%
- **HHI < $50k**: 54%
- **Senior**: 40%
- **Boomer**: 48%
- **Gen X**: 66%
- **Gen Z/Millennial**: 69%

Source: Harris Poll COVID19 Tracker Wave 15
BASE: GENERAL PUBLIC W15 (1969); GEN Z/MILL (673); GEN X (545); BOOMER (410); SENIOR (65+); HHI <$50K (748); HHI $50-75K (417); HHI $75K+ (758); DEM (691); GOP (651); WHITE (1486); BLACK (191)
RC6A Do you believe companies should provide a public statement regarding black lives matter and racial inequality in America?
Critically, These Demands Extend To Doing Business With Partners That Share Same Standards and Values On Racial Equality

<table>
<thead>
<tr>
<th>Statement</th>
<th>Disagree</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Companies/brands should ensure businesses/clients they do business with share similar standards when it comes to combating racial inequality.</td>
<td>33%</td>
<td>67%</td>
</tr>
<tr>
<td>I am more likely to buy from companies/brands that contribute to organizations/causes that combat racism.</td>
<td>37%</td>
<td>63%</td>
</tr>
<tr>
<td>Companies/brands have done enough to increase diversity in their leadership.</td>
<td>42%</td>
<td>58%</td>
</tr>
<tr>
<td>Companies/brands should respond publicly to protests and rising racial tensions.</td>
<td>43%</td>
<td>57%</td>
</tr>
<tr>
<td>Companies/brands should incorporate their views into advertising.</td>
<td>43%</td>
<td>57%</td>
</tr>
<tr>
<td>I am more likely to purchase from a company/brand that responds publicly to protests and rising racial tensions.</td>
<td>47%</td>
<td>53%</td>
</tr>
<tr>
<td>Companies/brands should pause their regular advertising during protests.</td>
<td>58%</td>
<td>42%</td>
</tr>
</tbody>
</table>

Source: Harris Poll COVID19 Tracker W16
BASE: GENERAL PUBLIC W16 (1963)
RCT19 How much do you agree or disagree with each of the following statements?
Half of Americans Say Their Workplace Has Made Meaningful Efforts to Address Racial Inequality

Has your place of employment made meaningful efforts internally to acknowledge and address racial inequality (e.g., making time and space for discussion, building dialogue between employees, discussing ways to create change toward racial inequality as a company)?

- Yes, 53%
- No, 28%
- Not sure, 19%

<table>
<thead>
<tr>
<th>Group</th>
<th>% Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>56%</td>
</tr>
<tr>
<td>Black</td>
<td>43%</td>
</tr>
<tr>
<td>Senior</td>
<td>48%</td>
</tr>
<tr>
<td>Boomer</td>
<td>45%</td>
</tr>
<tr>
<td>Gen X</td>
<td>57%</td>
</tr>
<tr>
<td>Gen Z/Millennial</td>
<td>56%</td>
</tr>
</tbody>
</table>

Source: Harris Poll COVID19 Tracker Wave 15
BASE: EMPLOYED W15 (1141)
RC6 Has your place of employment made meaningful efforts internally to acknowledge and address racial inequality (e.g., making time and space for discussion, building dialogue between employees, discussing ways to create change toward racial inequality as a company)?

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But Black Americans Are Much Less Likely to Agree They Are Paid a Competitive Wage

Do you agree or disagree that you are paid a competitive wage given your skillset relative to your peers?

<table>
<thead>
<tr>
<th></th>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Public</td>
<td>68%</td>
<td>32%</td>
</tr>
<tr>
<td>White</td>
<td>72%</td>
<td>28%</td>
</tr>
<tr>
<td>Black</td>
<td>55%</td>
<td>45%</td>
</tr>
<tr>
<td>Male</td>
<td>72%</td>
<td>28%</td>
</tr>
<tr>
<td>Female</td>
<td>64%</td>
<td>36%</td>
</tr>
</tbody>
</table>

Source: Harris Poll COVID19 Tracker Wave 15
BASE: GENERAL PUBLIC W15 (1969); WHITE (1486); BLACK (191); MALE (884); FEMALE (1085)
WAG01 Do you agree or disagree that you are paid a competitive wage given your skillset relative to your peers?
Nearly Half of Americans Say Black, Hispanic People Are Paid Lower Wages Than Their Peers

Generally speaking, for each of the following groups of people, do you believe that, on average, members of that group are paid a higher or lower wage given their skillset relative to their peers?

<table>
<thead>
<tr>
<th>Group</th>
<th>Higher</th>
<th>Same</th>
<th>Lower</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men</td>
<td>50%</td>
<td>45%</td>
<td>6%</td>
</tr>
<tr>
<td>White people</td>
<td>42%</td>
<td>52%</td>
<td>5%</td>
</tr>
<tr>
<td>Workers under 30</td>
<td>16%</td>
<td>57%</td>
<td>27%</td>
</tr>
<tr>
<td>Workers over 50</td>
<td>15%</td>
<td>55%</td>
<td>30%</td>
</tr>
<tr>
<td>Workers without a college education</td>
<td>10%</td>
<td>35%</td>
<td>55%</td>
</tr>
<tr>
<td>Women</td>
<td>8%</td>
<td>45%</td>
<td>47%</td>
</tr>
<tr>
<td>Black people</td>
<td>7%</td>
<td>47%</td>
<td>46%</td>
</tr>
<tr>
<td>Hispanic people</td>
<td>6%</td>
<td>46%</td>
<td>49%</td>
</tr>
</tbody>
</table>

Source: Harris Poll COVID19 Tracker Wave 15
WAG02 Generally speaking, for each of the following groups of people, do you believe that, on average, members of that group are paid a higher or lower wage given their skillset relative to their peers?
Two-Thirds Support the Facebook Boycotts and Are More Likely to Buy From Companies Taking Part

As you may have heard/read about, many advertisers are boycotting Facebook over its alleged laissez faire (i.e., lenient or laxed) ad policy that some argue spread hate, division and misinformation. Do you support or oppose the recent social media boycotts?

Are you more or less likely to currently buy from a brand/company that has taken part in the recent social media boycotts?

Source: Harris Poll COVID19 Tracker Wave 19
BASE: GENERAL PUBLIC W19 (1957)
LN02. As you may have heard/read about, many advertisers are boycotting Facebook over its alleged laissez faire (i.e., lenient or laxed) ad policy that some argue spread hate, division and misinformation. Do you support or oppose the recent social media boycotts?

LN04. Are you more or less likely to currently buy from a brand/company that has taken part in the recent social media boycotts?
The Harris Poll: COVID-19 in the U.S.

Agreement Is High for Companies to Play a Bigger Role, Pressure Tech Companies for Change

How much do you agree or disagree with each of the following statements in regards to the social media boycotts?

<table>
<thead>
<tr>
<th>Statement</th>
<th>Disagree</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketers and brands should play a bigger role in addressing our broken media ecosystem</td>
<td>25%</td>
<td>75%</td>
</tr>
<tr>
<td>While social media boycotts might not last long, at least it puts pressure on tech companies to make changes</td>
<td>25%</td>
<td>75%</td>
</tr>
<tr>
<td>The demands from companies remain vague and are sometimes already a part of Facebook policy</td>
<td>31%</td>
<td>69%</td>
</tr>
<tr>
<td>Advertisers may barely make a dent in Facebook’s revenues, this is merely a PR stunt</td>
<td>41%</td>
<td>59%</td>
</tr>
</tbody>
</table>

Source: Harris Poll COVID19 Tracker Wave 19
BASE: GENERAL PUBLIC W19 (N=1957)
LN05. How much do you agree or disagree with each of the following statements in regards to the social media boycotts?
Discussion
Thank you!

Ray Day, Vice Chair, The Stagwell Group
rayday@teamstagwell.com

John Gerzema, CEO, The Harris Poll
jgerzema@harrisinsights.com
Implications – What we expect moving forward

Health:

Lifting the curtain of fear is the job of American business. The fear and anxiety is palpable and historic. We see data that shows America is in its worst period on one’s own historical viewpoint. This is a public health crisis —both mental and physical—that tests the nation for most of us like no other time in our lifetimes. Lacking any consistent Federal policy, restoring consumer confidence and rebuilding the economy is on the shoulders of business. Americans are opening themselves to embracing facts, giving over their privacy and willing to follow orders to protect each other. Business must be in the business of alleviating fear by promising means of safety as consumers go about their lives, be it through technology, science, pharma or other means of protecting the public’s health. As the E100 shows, business can assure stability, continuity and reliability in a way that lifts American confidence. And it can also dedicate itself to the health of its customers and employees. We believe that every company today is a healthcare company.

Economics:

There are two economies as a result of CV19. We see in our data, two thirds who see their income same or higher, vs one third (who are more apt to be young, female, people of color, and of lower income/education) who are affected disproportionately. But a myriad of different types of people in the minority are facing hardship. Understanding this is important in your serving your own customer base and the needs of your employees. Companies need customized responses to meet the economics of CV, while also understanding the demand will be robust or weaker depending on this dichotomy.
Implications – What we expect moving forward

Society:
The left is becoming the center on human issues, less so on history and tradition. Americans are by-and-large moving to progressive views on racial injustice, systemic racism and police reform while at the same time giving pause to ‘the canceling’ of American history (statues, flags, defunding police or changing brands that seem out of step with the times). Roughly two-thirds are supportive of both issues, reflecting the earnestness for social change that is fair and just and fear of losing American tradition, ideals and security. Companies well-positioned to wade into the former, but not the latter.

A company’s mission, vision and values should be their guide, not their politics. Companies must act on their ethical values which must accept and include a wide range of political, economic and cultural experiences. And society wants corporations to show their ethics and morality to the marketplace. Increasingly, people —especially young people—buy brands from companies they admire and believe to be ethical and accountable public servants. In our data, Americans want and expect business to get involved in solving social problems. And amid political dysfunction and gridlock, Corporate leaders are the new face of American politics by reclaiming the art of compromise, collaboration and empathy for the public good (provided they are inclusive and take on social issues that unite rather than divide).

Employees are now more important than customers when it comes to speaking out on social issues. It began with climate change and generational shifts. It was amplified by the collective vulnerability of COVID and the rise of cultural consciousness of racial injustice. Employees are forcing leaders to speak out and stake positions. And companies cannot simply ‘forfeit’ the subject. To not speak out is also speaking out. And risking loss of talent, for whom company reputation is now tied up into their own self-identity.

But companies must ‘walk their talk’ on social issues. This is about action vs. words and having one’s house in order in terms of board and senior executive representation, fostering an inclusive culture, hiring and promotion practices and not engaging in consumer discrimination.

Society wants to see your struggles. Given the enormous gaps in systemic practices that discriminate on the basis of color, gender, income and more—all companies, individuals and institutions are reflecting and adjusting. Companies must admit their shortcomings and set targets for growth on internal change the same way they set targets for growth in their financial forecasts.