



HOW COVID-19 IS IMPACTING AMERICANS
OCTOBER 2020

Introduction & Methodology

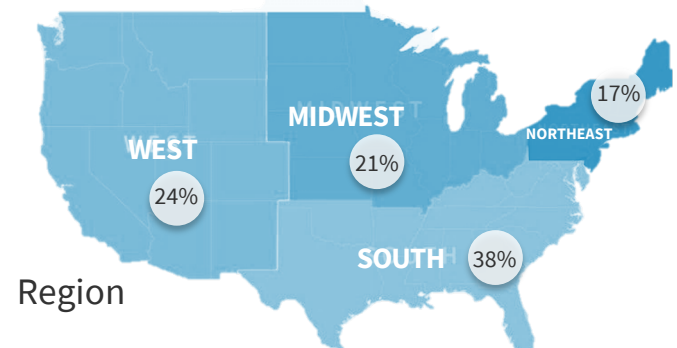
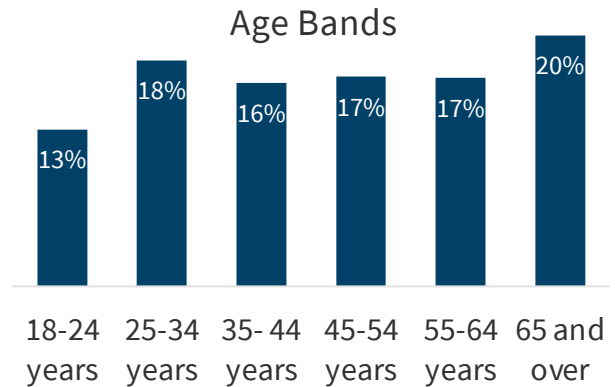
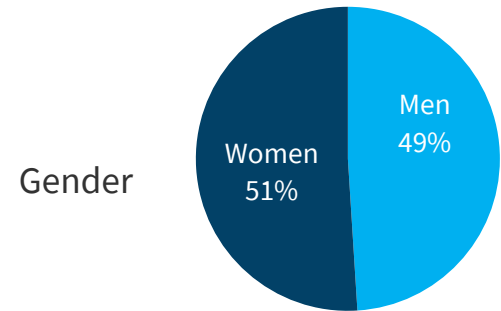
Using the Reputation Leaders ThoughtBite framework™ we ran the second wave of an online US consumer study to explore the impact of COVID-19 on consumer lifestyles and brand reputation.

The COVID-19 pandemic—and, more recently, heightened global public discourse around racial injustice and #BLM – has prompted organizations and employers to assert and redefine their company purpose. Organizations have had to also reassess how their behavior in the pandemic impacts their reputation and employee engagement and inclusion.

In this wave of our survey, we wanted to ask respondents who are currently working how connected they feel to their employers’ purpose. We also wanted to find out much progress Americans think their employers have made on racism in the workplace in the last year, and how much was talk not action.

This survey ran from September 28-30, 2020 among 1,000 US adults aged 18 and over, matching the demographic profile of the US according to the latest census statistics. A prior wave of this survey ran from April 20-21, 2020.

The data is weighted to US national census on age, gender and region. Regions are based on the US census 4 region split by state. The margin of error for the total sample of 1000 is +/-3.1% at the 95 percent level.



Consumer trends during COVID-19

COVID-19 pandemic has moved from a health crisis to also be an economic crisis

Over half of Americans (57%) have been impacted financially by the COVID-19 pandemic

- On a positive note, nearly half (48%) of Americans surveyed received financial support through the Federal stimulus.
- Negatively, some 14% have lost jobs/been furloughed. 15% have used savings or pay-day loans.

3 in 5 (59%) Americans health (physical, emotional and mental) has suffered during the COVID-19 pandemic.

- 47% have self-isolated to protect themselves and others.
- 18% of Americans say aspects of their health have suffered during COVID-19.
- 21% have stopped going to the gym/ exercising.

One third of Americans (34%) surveyed have been unable to see family or friends due to COVID-19.

- One in 9 (11%) say they have missed family events (funerals, weddings, vacations and birthdays are events most missed)

One third (34%) of Americans admire/respect the federal government less now than one month ago.

- In an election year, COVID-19 has diminished federal or state governments' 'brand' reputation with one in ten respondents recalling the federal or state government as an example of a 'brand' which has damaged its reputation during the COVID-19 pandemic.

Admiration remains highest for frontline workers, local businesses and restaurants.

- Six months into the pandemic Americans still admire frontline and medical workers the most.
- However, support has broadly dropped by 6-8%pts across the board since April.

Employers and big business can do more to improve their reputation during the pandemic.

- Some of the most admired brands have reputational detractors as well as supporters, e.g. Amazon, Walmart, Target.
- While 3 in 5 US workers surveyed are proud to work for their current employer, 55% cannot name a brand that has improved its reputation during COVID-19. This suggests companies have focused on internal comms more than external

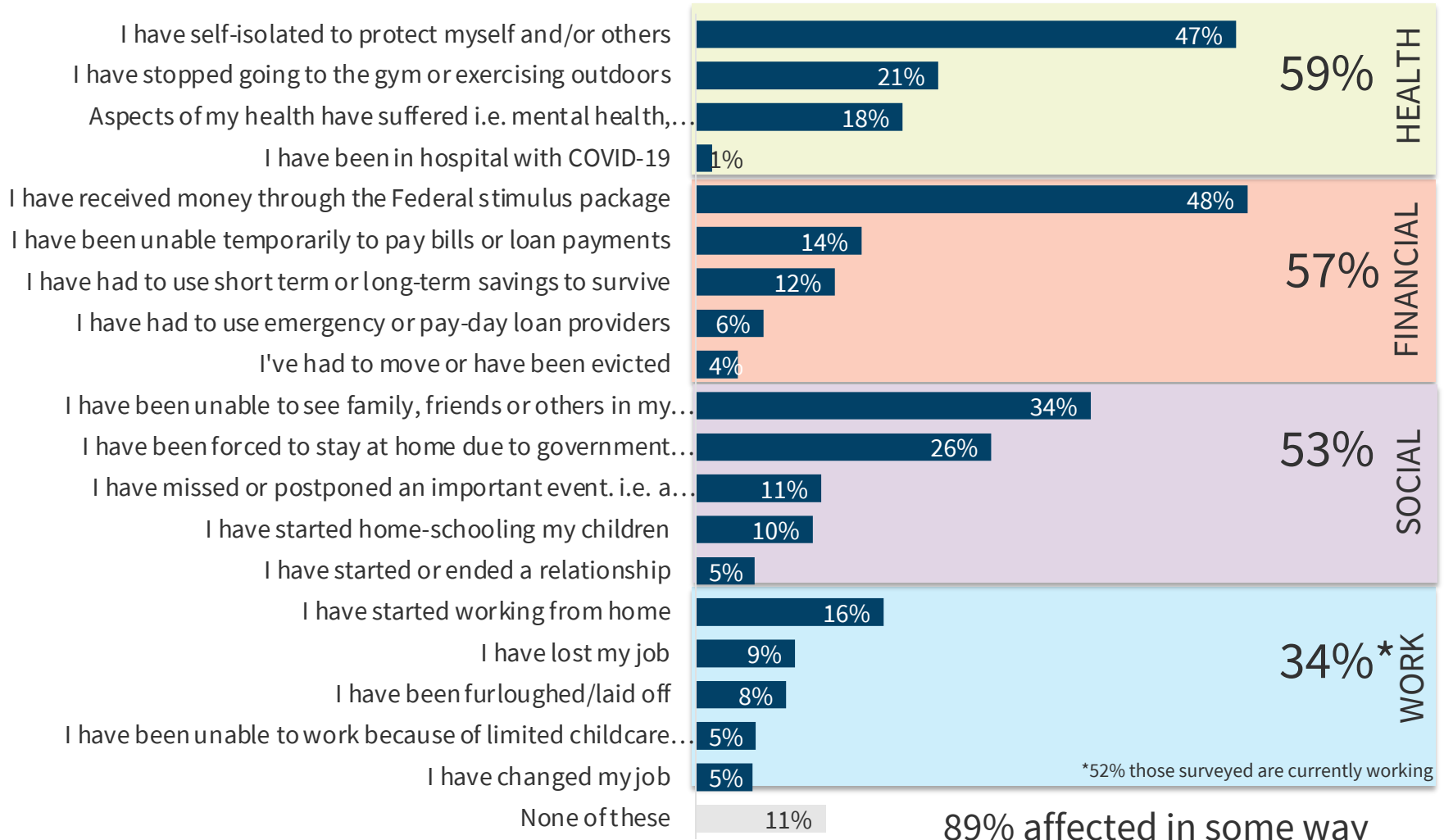


IMPACT OF COVID-19 ON CONSUMER LIFESTYLES AND BRAND REPUTATION

Americans' health and finances are both impacted by COVID-19. 89% have been affected in some way.



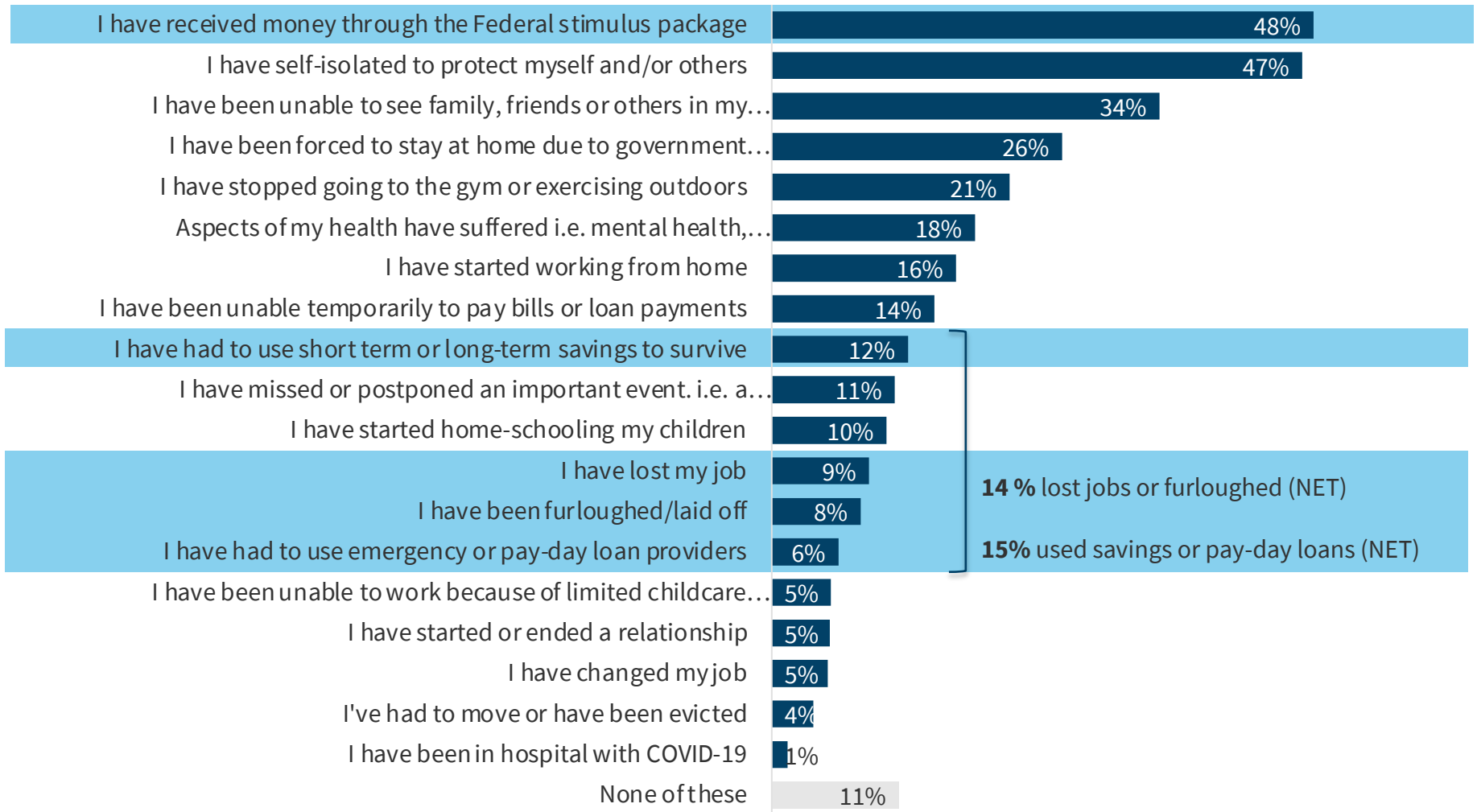
How has your life been impacted, if at all, by the COVID-19 pandemic?



Changing Consumer Trends during the COVID-19 pandemic - September 2020; Q7 How has your life been impacted, if at all, by the COVID-19 pandemic + Q7A I have missed or postponed an important event. i.e. a wedding, funeral or birth (coded). SUMMARY; Total sample; Weighted.

Nearly half (48%) of Americans surveyed received money through the Federal stimulus. 14% lost jobs/were furloughed. 15% used savings or pay-day loans.

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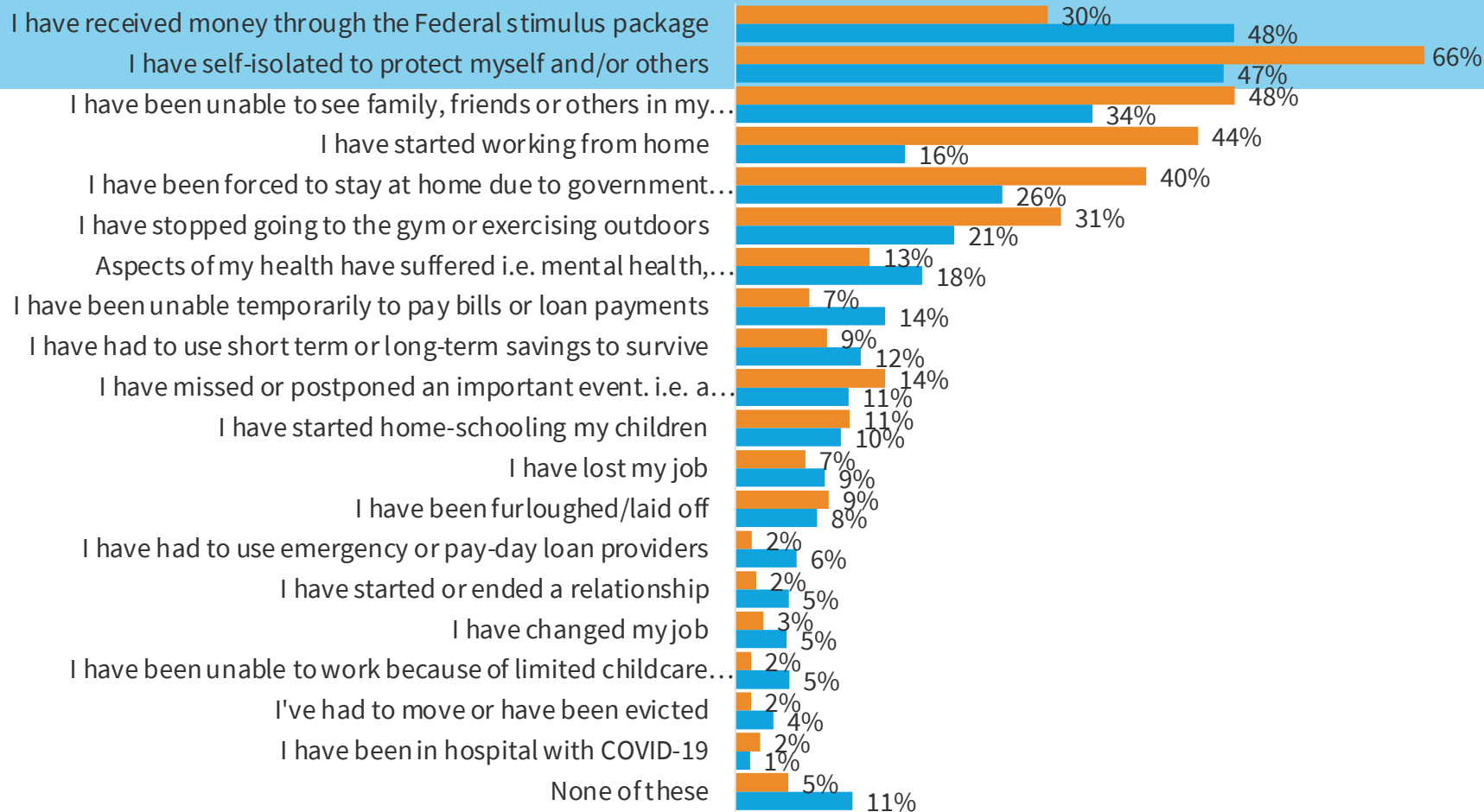


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From April –Sept 2020, financial concerns have increased significantly while self isolation has reduced.

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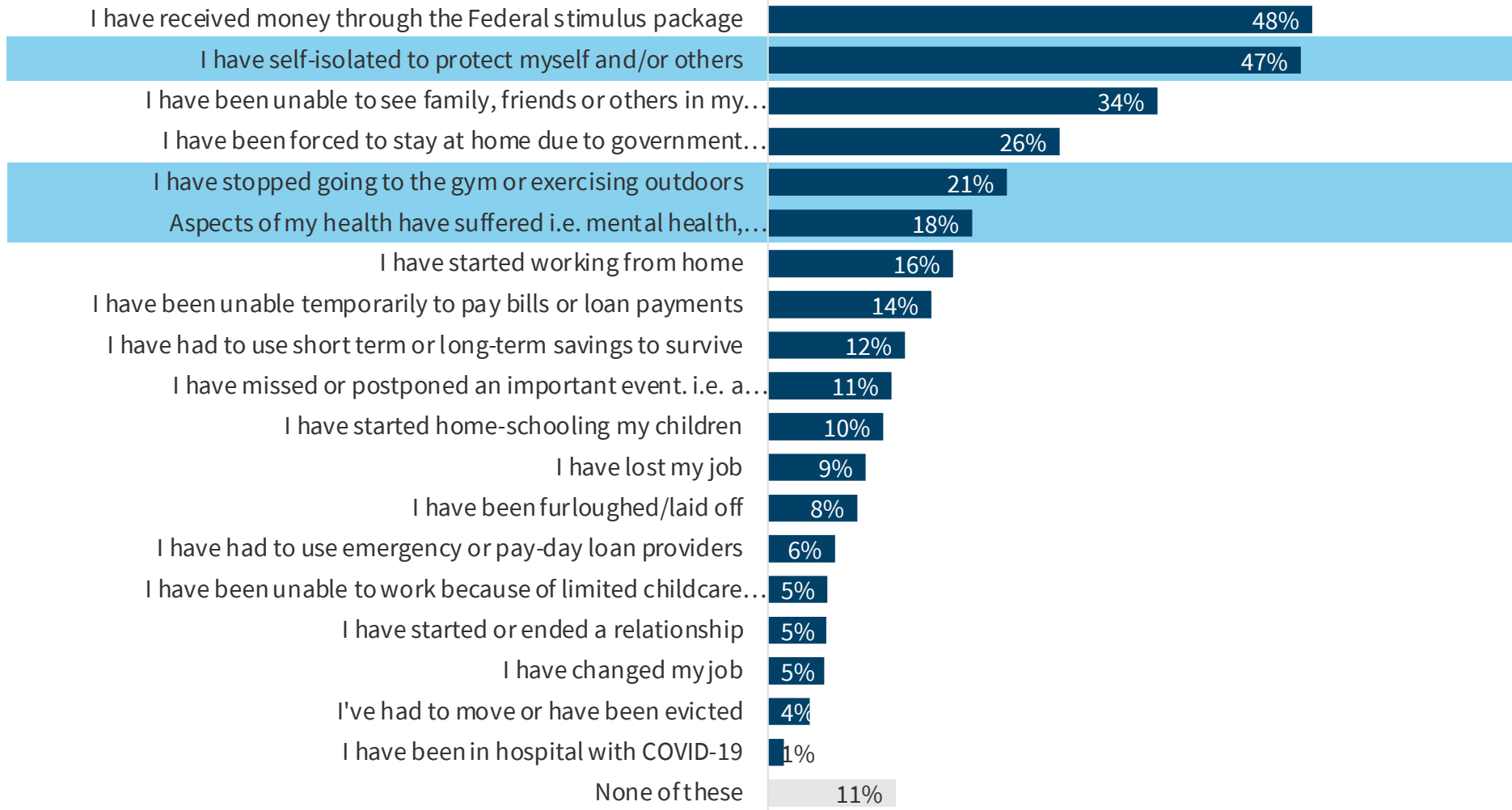
Apr-20 Sep-20



Changing Consumer Trends during the COVID-19 pandemic - September 2020; Q7 How has your life been impacted, if at all, by the COVID-19 pandemic SUMMARY; Total sample; Weighted Vs. Changing Consumer Trends during the COVID-19 pandemic - April 2020. Q9 How has your life been impacted, if at all, by the COVID-19 pandemic? Unweighted.

18% of Americans say aspects of their health have suffered during COVID-19. 47% have self-isolated. 21% stopped going to the gym/exercising.

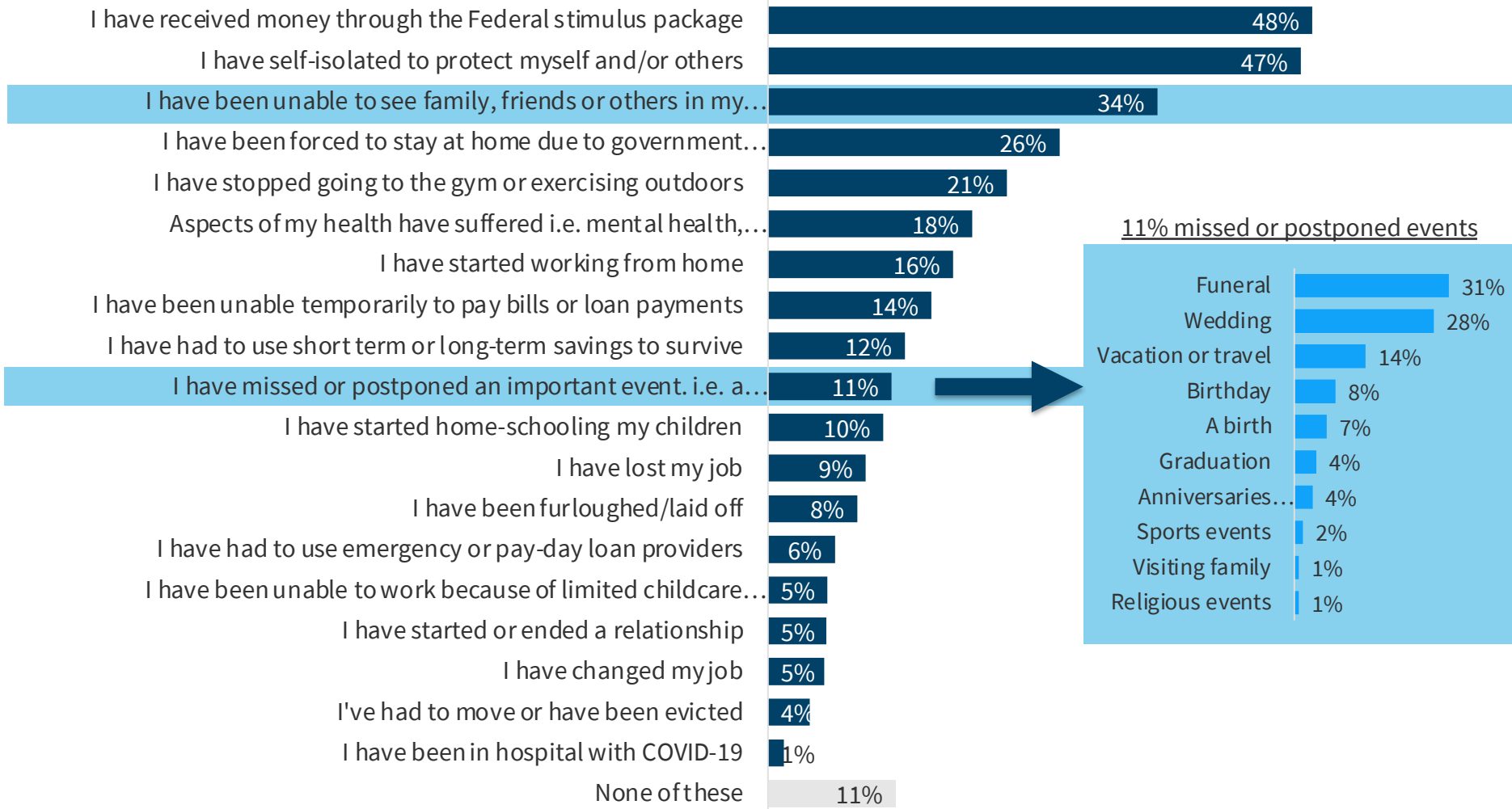
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One third (34%) of Americans surveyed have been unable to see family or friends due to COVID-19. One in 9 (11%) have missed family events

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WHO DO AMERICANS ADMIRE DURING THE COVID-19 PANDEMIC?

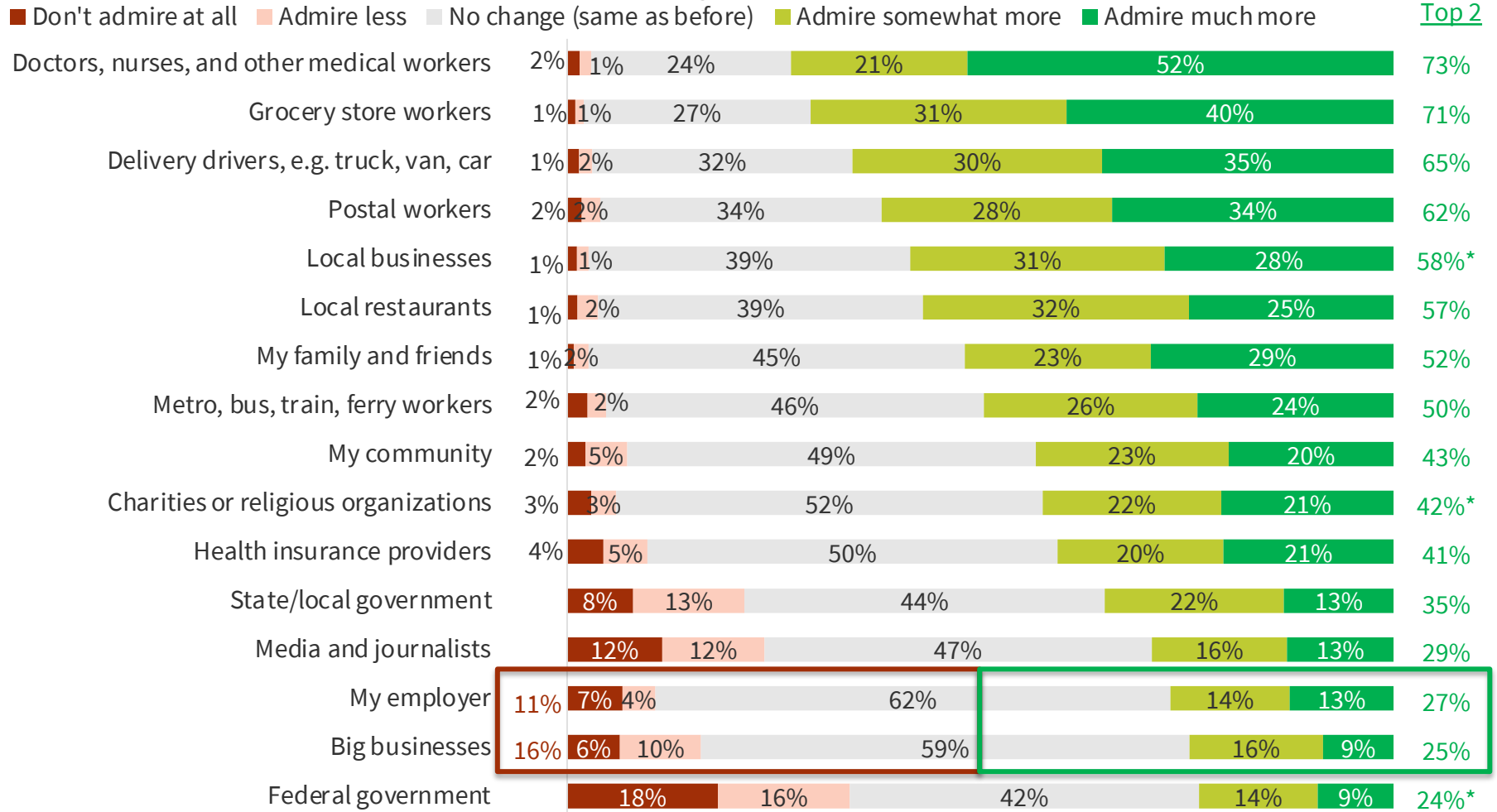


Image by John Borba via Unsplash.com

Employers and big business need to do much more to improve their reputation during the pandemic.



In the last month, how has your respect and admiration changed for the following workers or organizations?

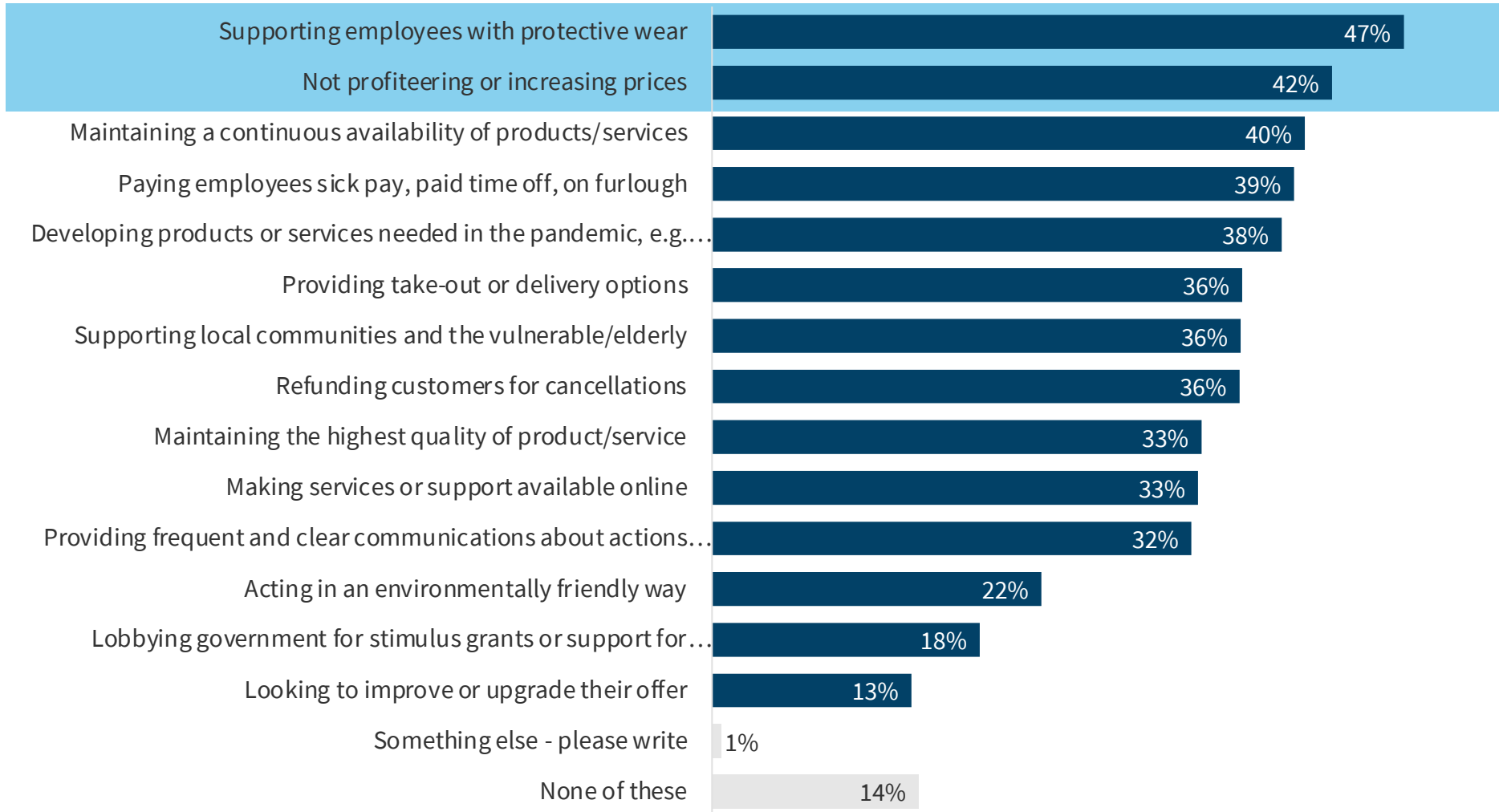


Changing Consumer Trends during the COVID-19 pandemic - September 2020; Q9 In the last month, how has your respect and admiration changed for the following workers or organizations SUMMARY; Total sample; Weighted. (Top 2 is the net of the top 2 and where starred may be +/- 1% due to rounding)

Protecting employees, not profiteering and resilient supply chains are the important ways to protect brand reputation during COVID-19.



During the COVID-19 pandemic, which company or brand actions are most important to you?



Changing Consumer Trends during the COVID-19 pandemic - September 2020; Q8 During the COVID-19 pandemic, which company or brand actions are most important to you SUMMARY; Total sample; Weighted

Companies' supply chains, developing COVID-19 products, and refunding customers for cancellations are less important to consumers now than in April.

During the COVID-19 pandemic, which company or brand actions are most important to you?

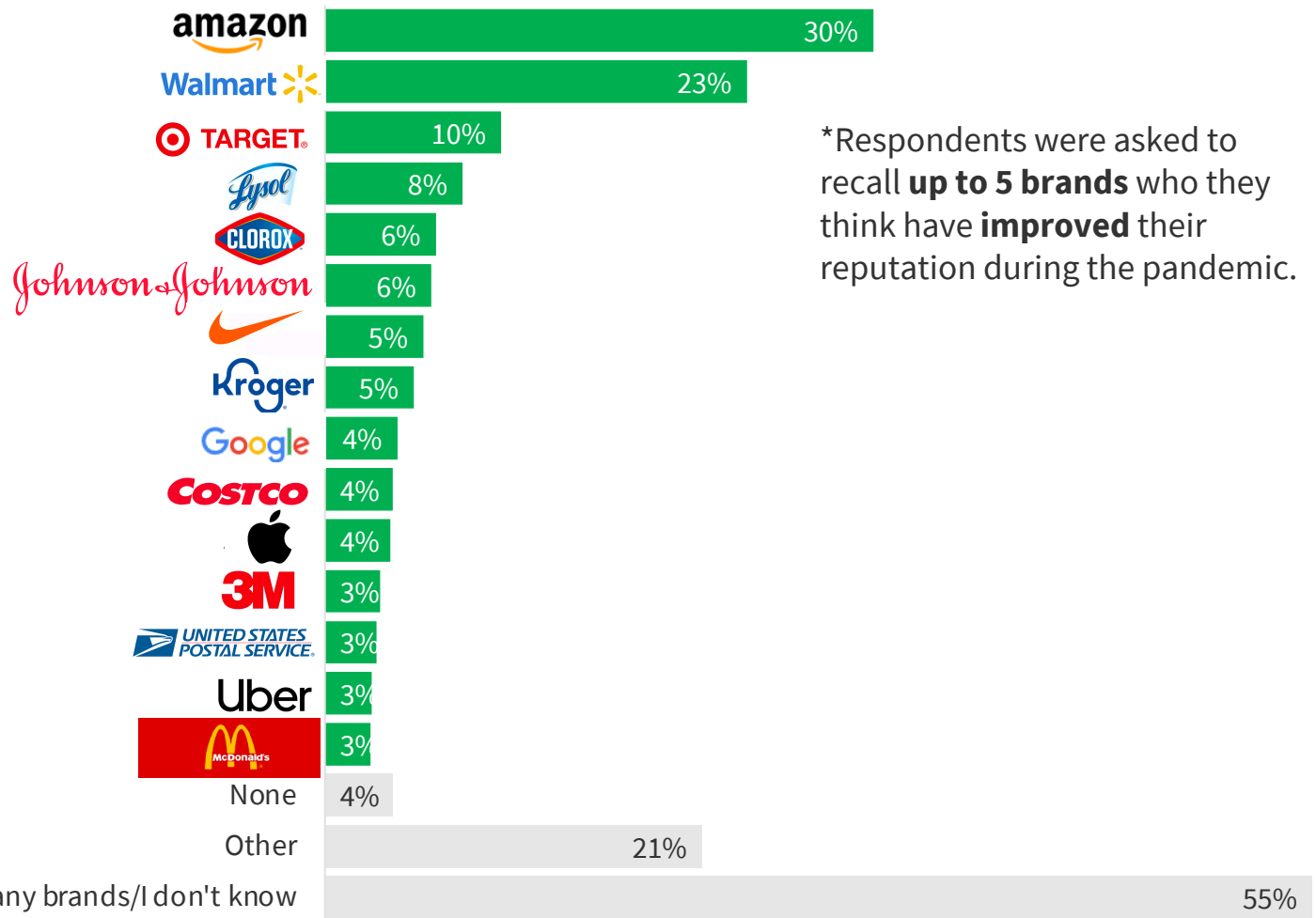
■ Apr-20 ■ Sep-20



Changing Consumer Trends during the COVID-19 pandemic - September 2020; Q8 During the COVID-19 pandemic, which company or brand actions are most important to you SUMMARY; Total sample; Weighted vs. Changing Consumer Trends during the COVID-19 pandemic - April 2020. Q15 During the pandemic, which company or brand actions are most important to you? Unweighted.

High recall of brands who have **improved** their reputation during the pandemic. Amazon, Walmart, and Target top the list.

Which brands, if any, do you think have improved their reputation during the COVID-19 pandemic?*

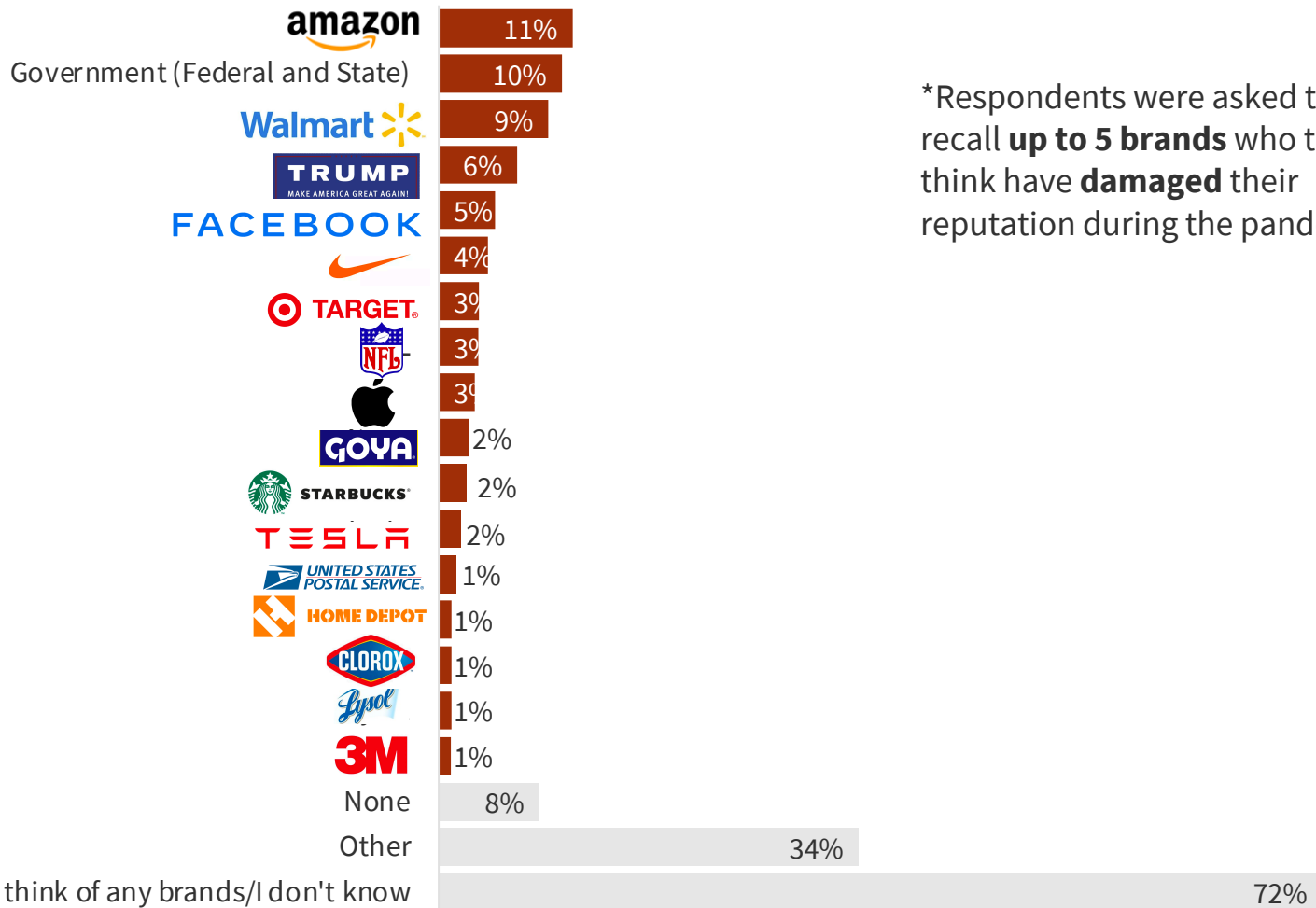


*Respondents were asked to recall **up to 5 brands** who they think have **improved** their reputation during the pandemic.

Changing Consumer Trends during the COVID-19 pandemic - September 2020; Q10 Which brands, if any, do you think have improved their reputation during the COVID-19 pandemic? (Total Recode - All brands) - Coded & Combined with DK SUMMARY; Total sample; Weighted - October 2020

Lower recall of brands who have **damaged** their reputation during the pandemic. Amazon and Walmart top the list again along with the Government with mentions of President Trump and Facebook.

Which brands, if any, do you think have damaged their reputation during the COVID-19 pandemic?



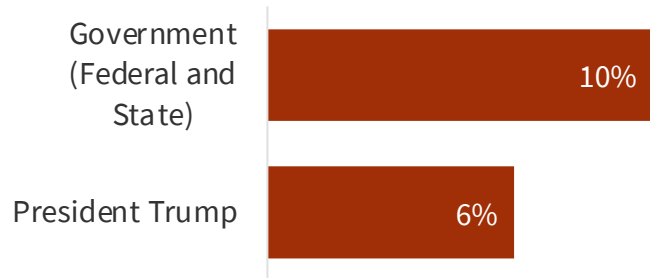
* Respondents were asked to recall **up to 5 brands** who they think have **damaged** their reputation during the pandemic.

Changing Consumer Trends during the COVID-19 pandemic - September 2020; Q11 Which brands, if any, do you think have damaged their reputation during the COVID-19 pandemic? (Total Recode - all brands) - Coded & Combined with DK SUMMARY; Total sample; Weighted - October 2020

In an election year, COVID-19 has led to a fall in respect/admiration for federal government. One third (34%) of Americans now admire the federal government less than they did one month ago.

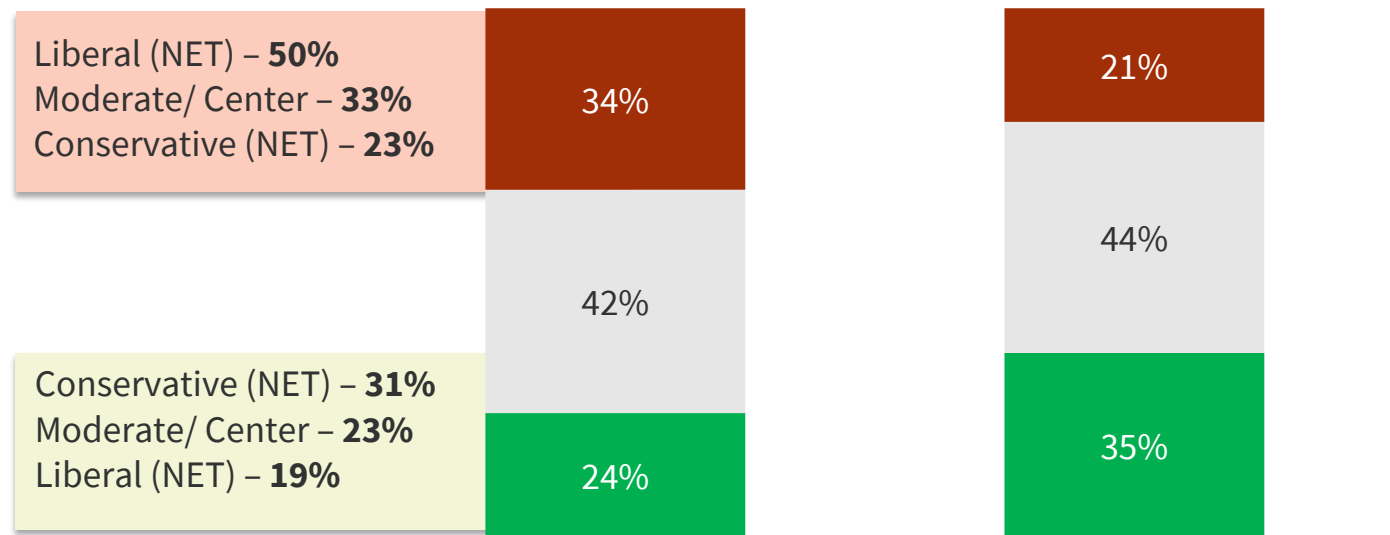


Which brands, if any, do you think have damaged their reputation during the COVID-19 pandemic?



In the last month, how has your respect and admiration changed for the following workers or organizations? (Government only)

- Admire less or not at all (Bottom 2)
- No change (same as before)
- Admire more (Top 2)

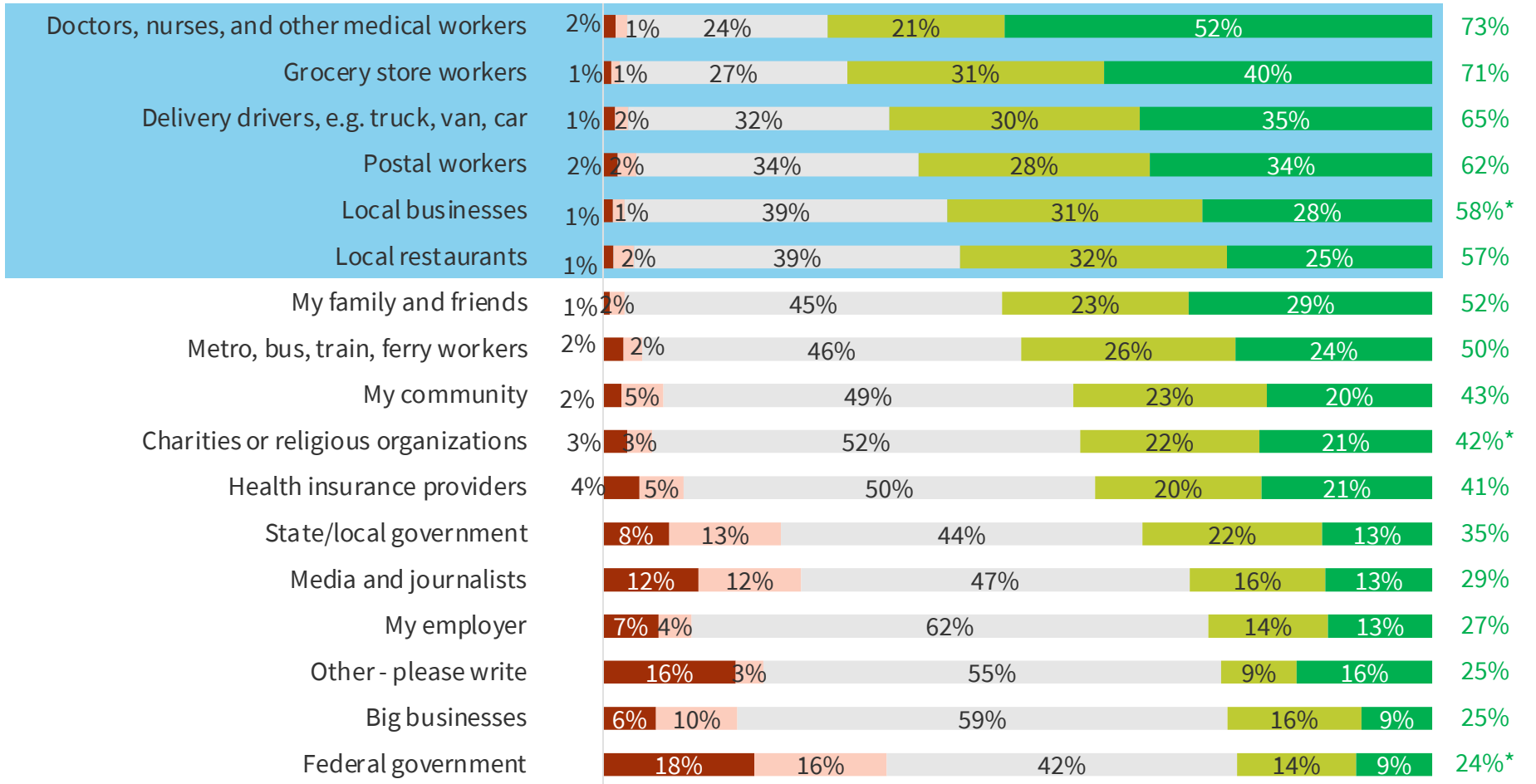


Changing Consumer Trends during the COVID-19 pandemic - September 2020; Q11 Which brands, if any, do you think have damaged their reputation during the COVID-19 pandemic? (Total Recode - all brands) - Coded & Combined with DK SUMMARY + Q9 In the last month, how has your respect and admiration changed for the following workers or organizations (Government only) ; Total sample; Weighted - October 2020

Admiration remains highest for frontline workers, local businesses and restaurants.

In the last month, how has your respect and admiration changed for the following workers or organizations?

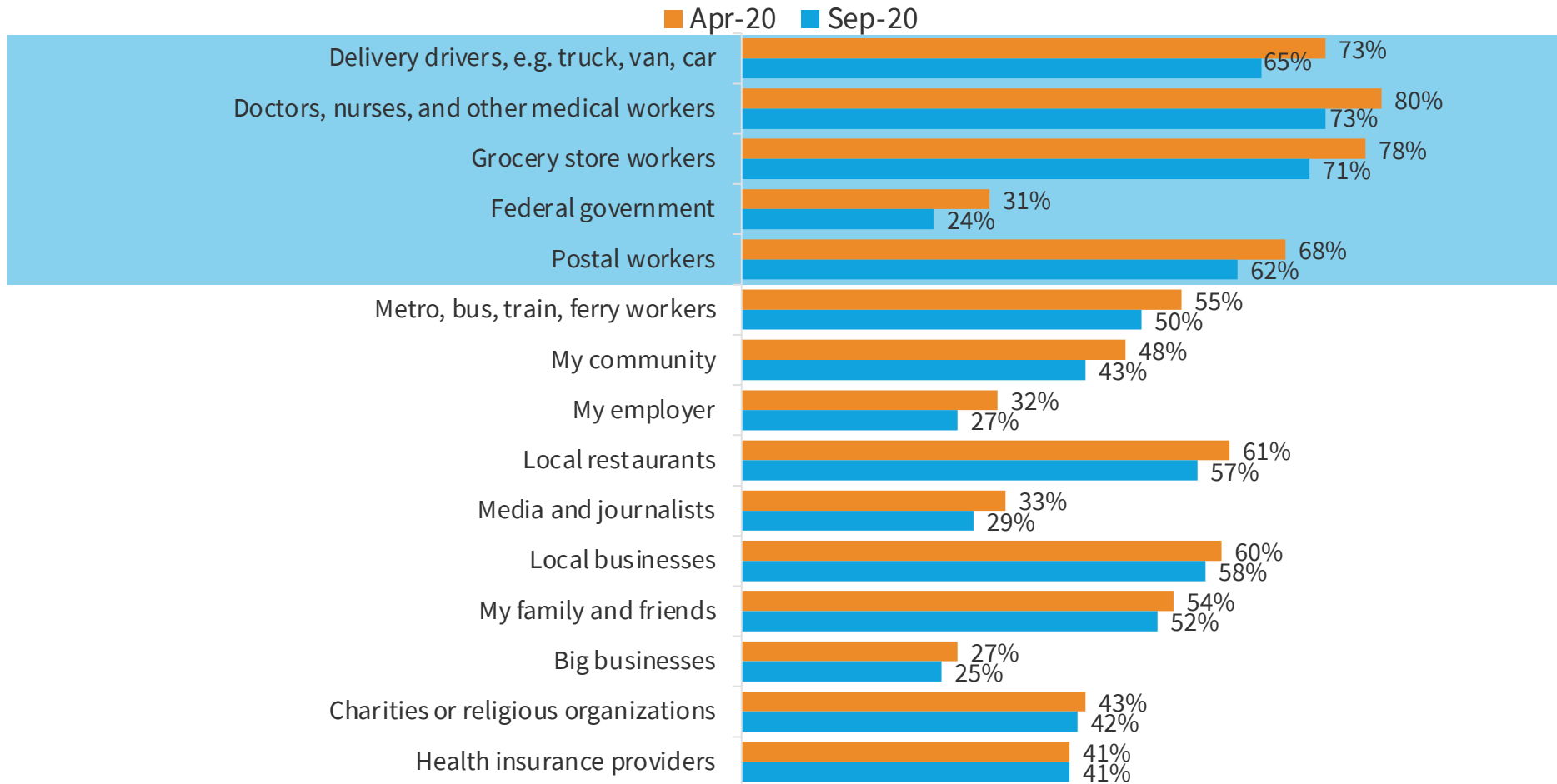
■ Don't admire at all
 ■ Admire less
 ■ No change (same as before)
 ■ Admire somewhat more
 ■ Admire much more
 Top 2



Changing Consumer Trends during the COVID-19 pandemic - September 2020; Q9 In the last month, how has your respect and admiration changed for the following workers or organizations SUMMARY; Total sample; Weighted. (Top 2 is the net of the top 2 and where starred may be +/- 1% due to rounding)

Six months into the pandemic, Americans still admire frontline and medical workers the most. Support has dropped by 6 to 8%.

In the last month, how has your respect and admiration changed for the following workers or organizations? (Top 2 – Admire more)



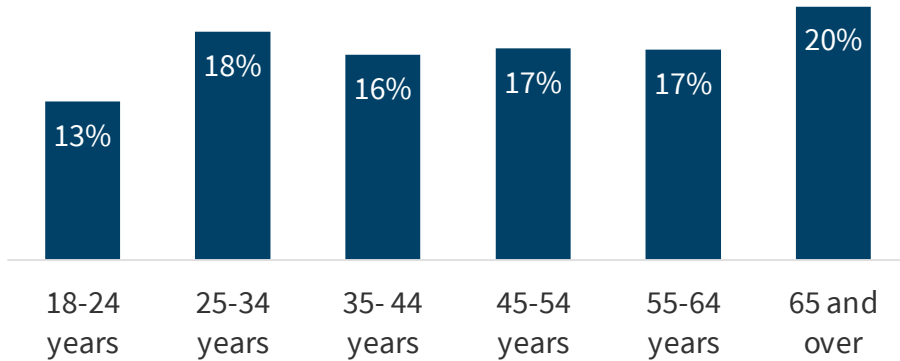
Changing Consumer Trends during the COVID-19 pandemic - September 2020; Q9 In the last month, how has your respect and admiration changed for the following workers or organizations (Top 2) SUMMARY; Total sample; Weighted - October 2020 vs. Changing Consumer Trends during the COVID-19 pandemic - April 2020 Q17 In the last month, how has your respect and admiration changed for the following workers or organizations (Top 2) Unweighted.

SCREENERS & DEMOGRAPHICS

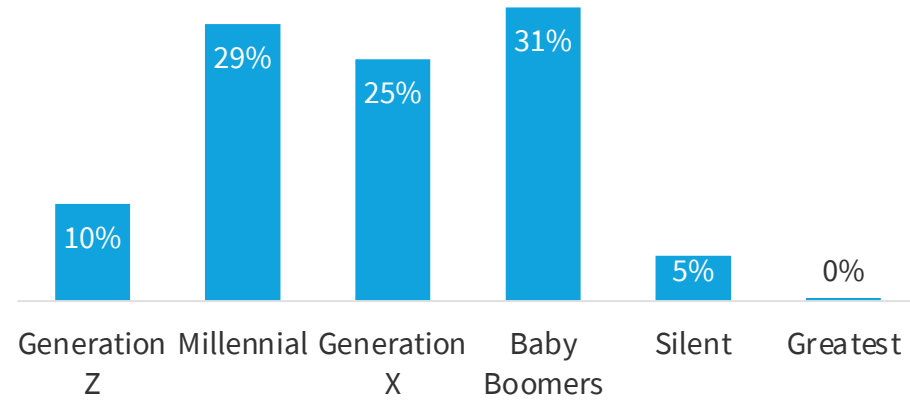
Respondents nationally representative of age, gender and region



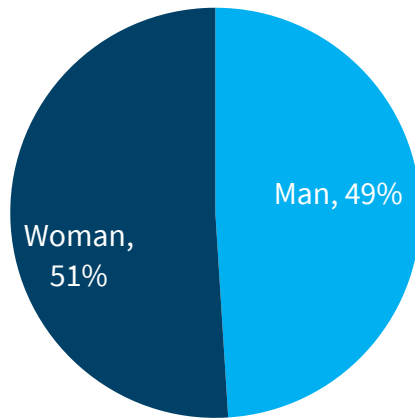
Age Bands



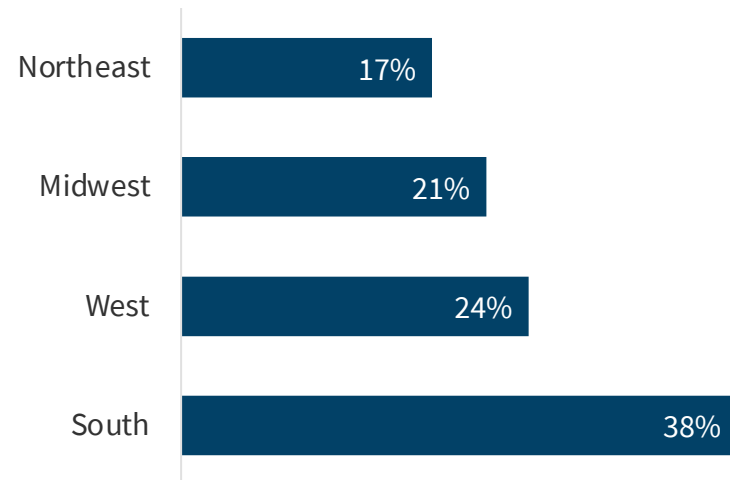
Age Generations



Gender

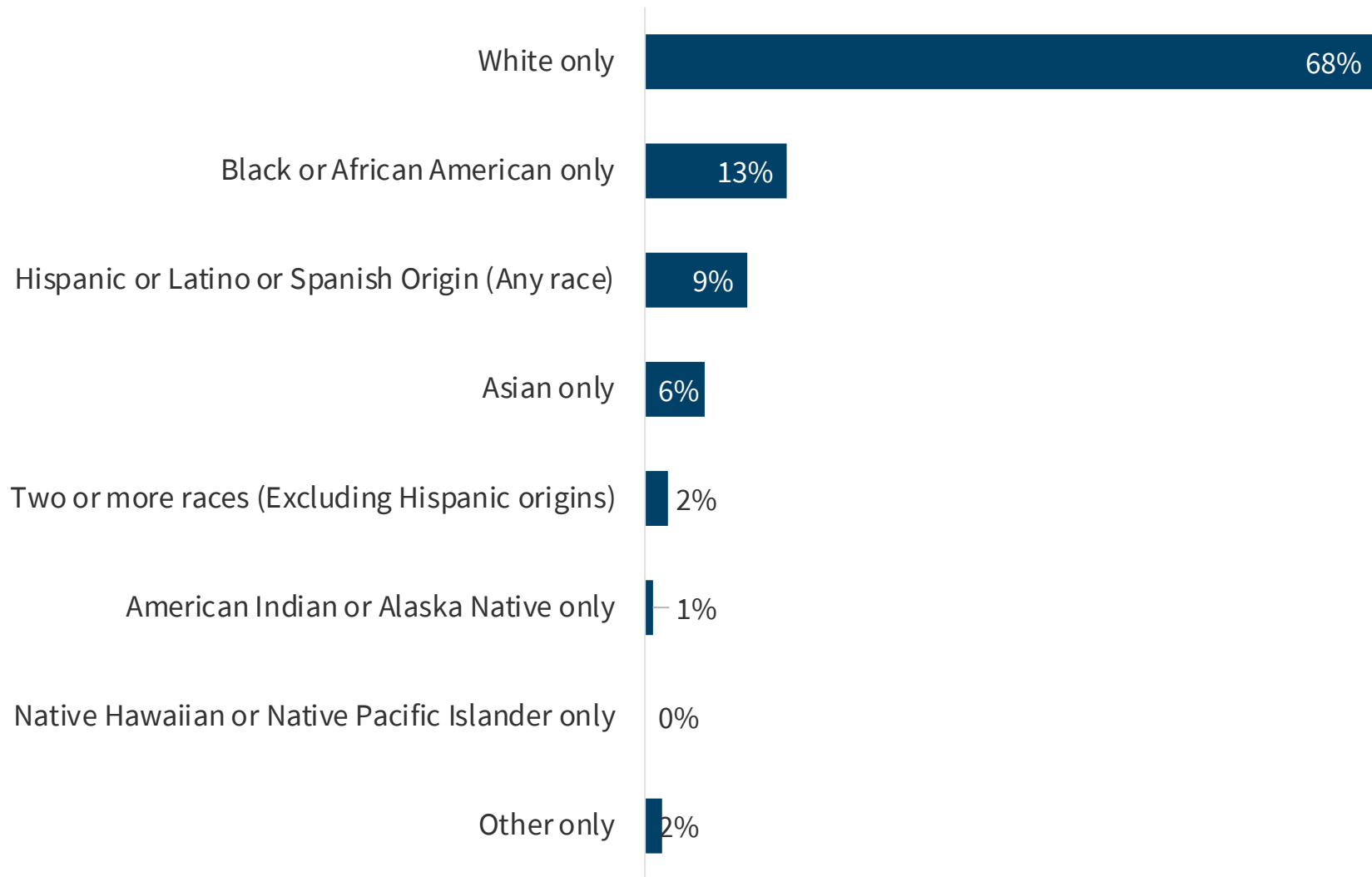


US Region



Changing Consumer Trends during the COVID-19 pandemic - September 2020; S1 Age Deciles, S1 Age Generations, S2 Gender, S3 Region, USA, SUMMARY; Total sample; Weighted

Which race or origin do you most closely identify with?



Changing Consumer Trends during the COVID-19 pandemic - September 2020; S4 Which race or origin do you most closely identify with? SUMMARY; Total sample; Weighted

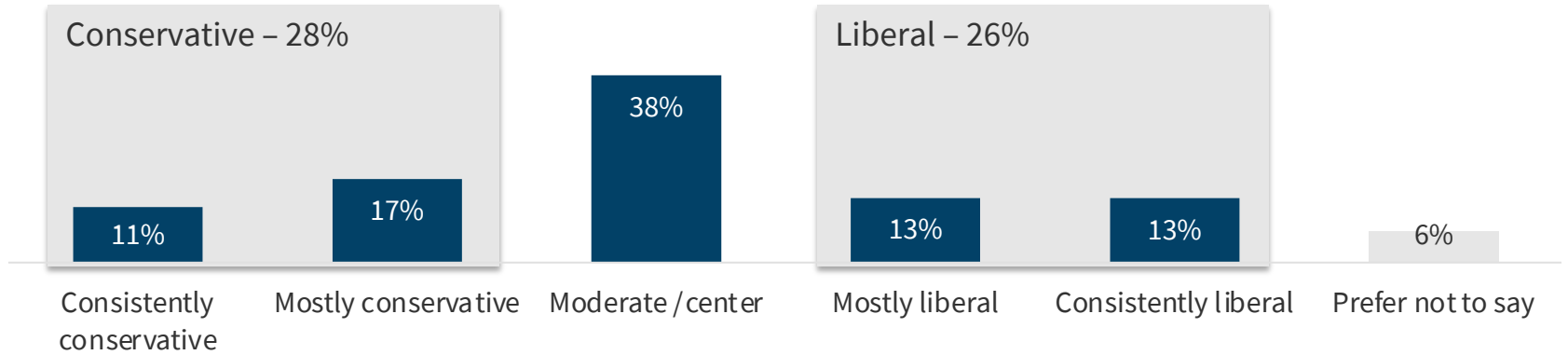
Race and Gender

		%	Population
White only	Man	34%	340
	Woman	34%	338
Black or African American only	Man	6%	56
	Woman	7%	74
American Indian or Alaska Native only	Man	0%	2
	Woman	1%	5
Native Hawaiian or Native Pacific Islander only	Man	0%	0
	Woman	0%	0
Hispanic or Latino or Spanish Origin (Any race)	Man	4%	39
	Woman	5%	54
Asian only	Man	3%	30
	Woman	3%	25
Other only	Man	1%	10
	Woman	1%	6
Two or more races (Excluding Hispanic origins)	Man	1%	13
	Woman	1%	8

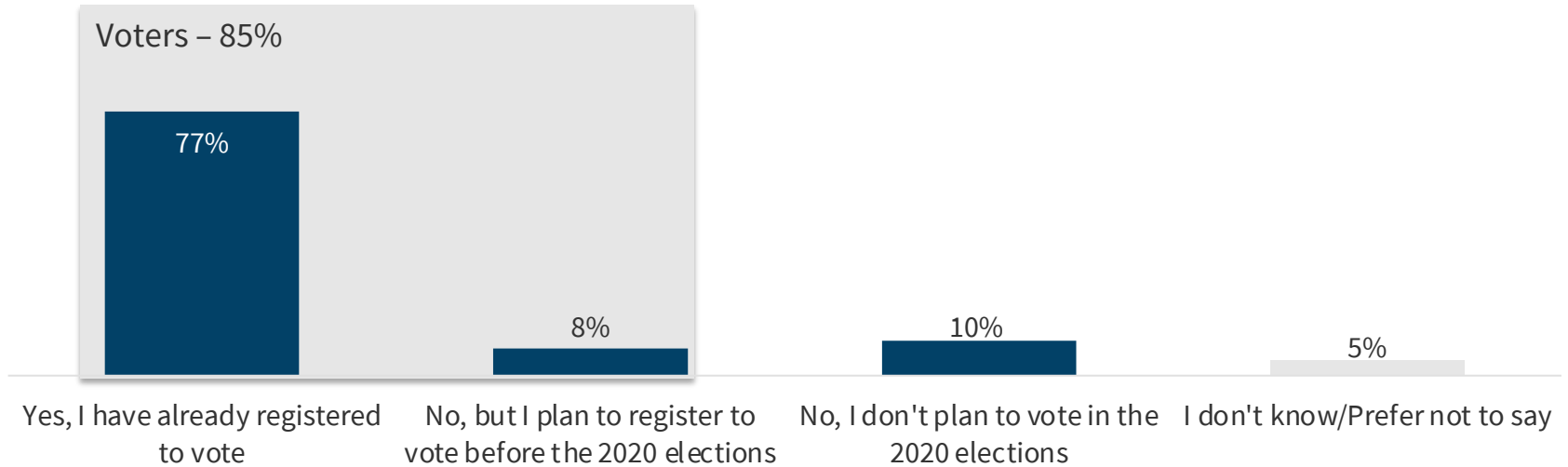
Changing Consumer Trends during the COVID-19 pandemic - September 2020; S4 Which race or origin do you most closely identify with? BY S2 Gender

Political affiliation/voting intention

Which of the following best represents your political viewpoint?



Have you already registered to vote in the US elections?



Changing Consumer Trends during the COVID-19 pandemic - September 2020; Q19 Which of the following best represents your political viewpoint? + Q20 Have you already registered to vote in the US elections? SUMMARY; Total sample; Weighted