

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.

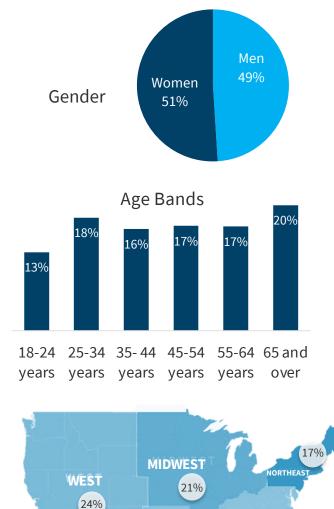
The COVID-19 pandemic—and, more recently, heightened global public discourse around racial injustice and #BLM – has prompted organizations and employers to assert and redefine their company purpose. Organizations have had to also reassess how their behavior in the pandemic impacts their reputation and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





SOUTH

Region

38%

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



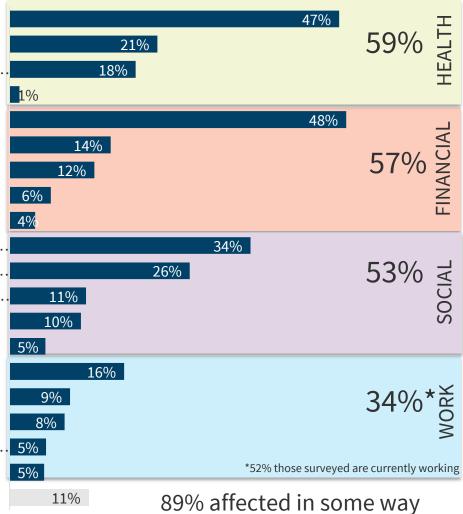
IMPACT OF COVID-19 ON CONSUMER LIFESTYLES AND BRAND REPUTATION

Image by Ross Sneddon via Unsplash.con



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?



I have self-isolated to protect myself and/or others I have stopped going to the gym or exercising outdoors Aspects of my health have suffered i.e. mental health,... I have been in hospital with COVID-19 I have received money through the Federal stimulus package I have been unable temporarily to pay bills or loan payments I have had to use short term or long-term savings to survive I have had to use emergency or pay-day loan providers I've had to move or have been evicted I have been unable to see family, friends or others in my... I have been forced to stay at home due to government... I have missed or postponed an important event. i.e. a... I have started home-schooling my children I have started or ended a relationship I have started working from home I have lost my job I have been fur loughed/laid off I have been unable to work because of limited childcare... 5% I have changed myjob

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.

None of these

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

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

I have received money through the Federal stimulus package	48%		
I have self-isolated to protect myself and/or others	47%		
I have been unable to see family, friends or others in my			
I have been forced to stay at home due to government	. 26%		
I have stopped going to the gym or exercising outdoors	21%		
Aspects of my health have suffered i.e. mental health,	. 18%		
I have started working from home	16%		
I have been unable temporarily to pay bills or loan payments	14%		
I have had to use short term or long-term savings to survive	12%		
I have missed or postponed an important event. i.e. a	. 11%		
I have started home-schooling my children	10%		
I have lost my job	9% 14 % lost jobs or furloughed (NET)		
I have been fur loughed/laid off	8%		
I have had to use emergency or pay-day loan providers	6% 15% used savings or pay-day loans (NET)		
I have been unable to work because of limited childcare…	. 5%		
I have started or ended a relationship	5%		
I have changed myjob	5%		
I've had to move or have been evicted	4%		
I have been in hospital with COVID-19	1%		
None of these	11%		

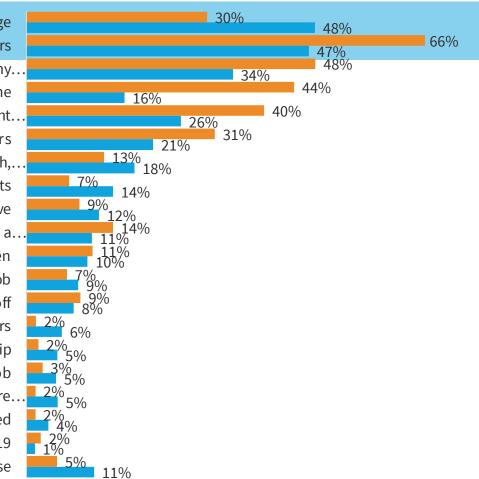
Changing Consumer Trends during the COVID-19 pandemic - September 2020; Q7 How has your life been impacted, if at all, by the COVID-19 pandemic + Q7A I have missed or postponed an important event. i.e. a wedding, funeral or birth (coded). SUMMARY; Total sample; Weighted.

REPUTATION



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

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



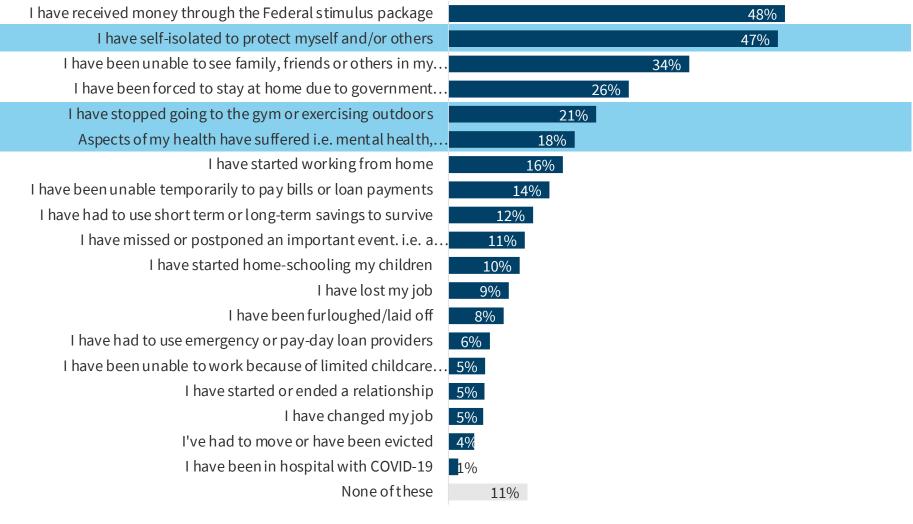
Apr-20 Sep-20

I have received money through the Federal stimulus package I have self-isolated to protect myself and/or others I have been unable to see family, friends or others in my... I have started working from home I have been forced to stay at home due to government.. I have stopped going to the gym or exercising outdoors Aspects of my health have suffered i.e. mental health,... I have been unable temporarily to pay bills or loan payments I have had to use short term or long-term savings to survive I have missed or postponed an important event. i.e. a... I have started home-schooling my children I have lost my job I have been fur loughed/laid off I have had to use emergency or pay-day loan providers I have started or ended a relationship I have changed myjob I have been unable to work because of limited childcare... I've had to move or have been evicted I have been in hospital with COVID-19 None of these

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.

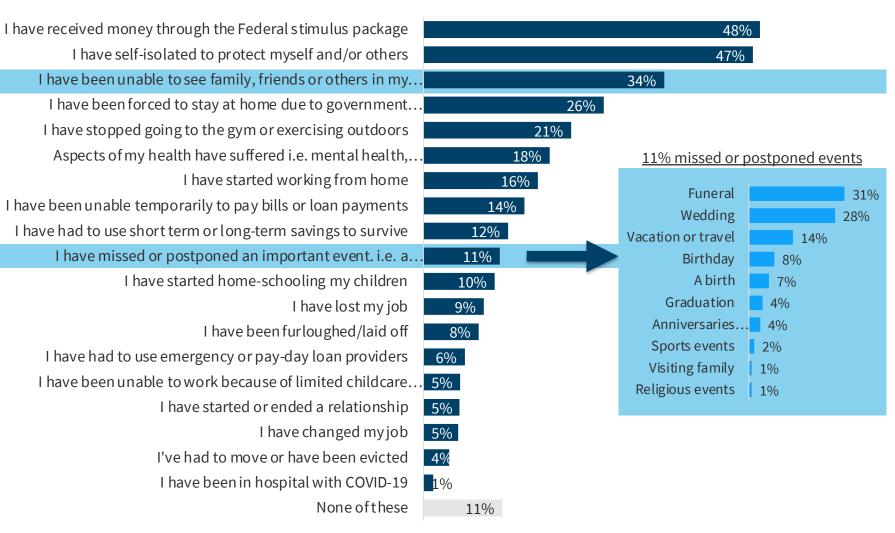
How has your life been impacted, if at all, by the COVID-19 pandemic?



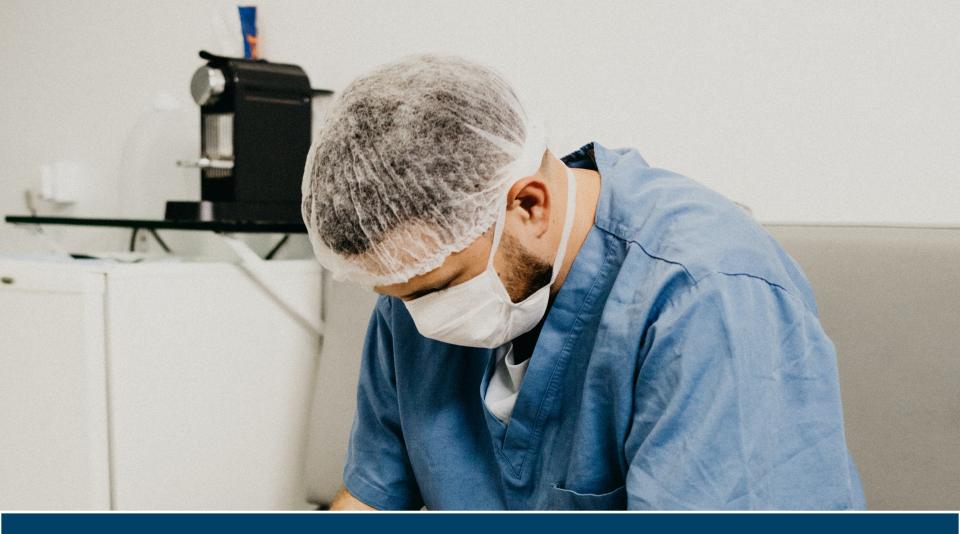
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One third (34%) of Americans surveyed have been unable to see family or friends due to COVID-19. One in 9 (11%) have missed family events

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



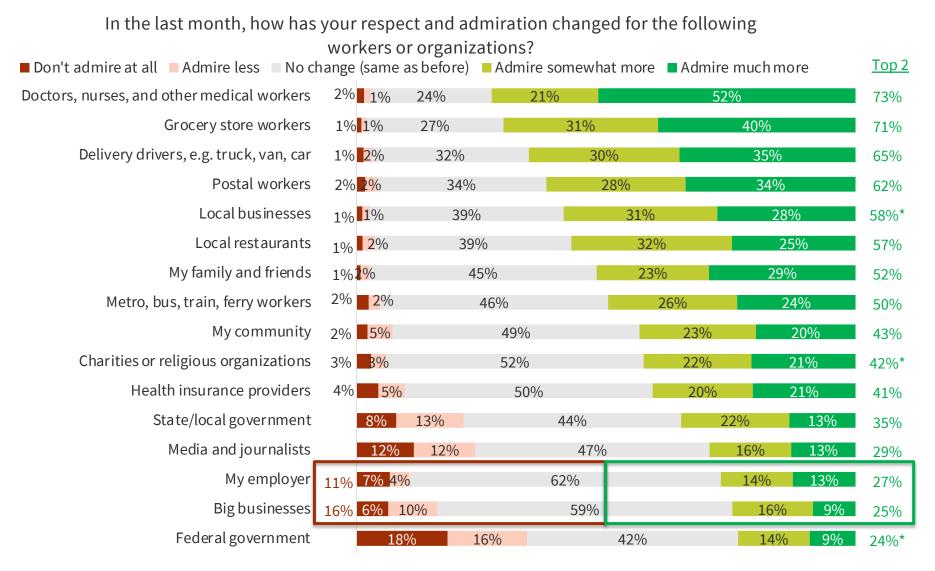
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WHO DO AMERICANS ADMIRE DURING THE COVID-19 PANDEMIC?

Image by John Borba via Unsplash.com

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



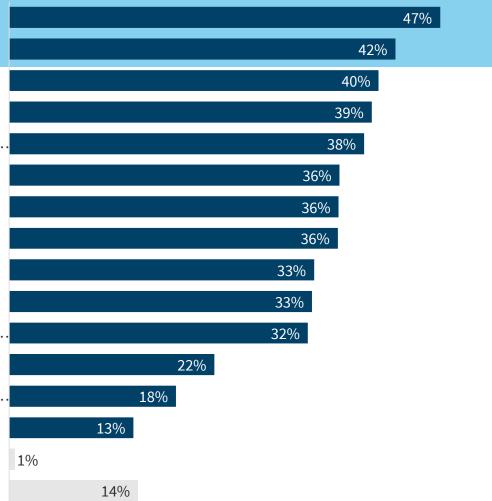
Changing Consumer Trends during the COVID-19 pandemic - September 2020; Q9 In the last month, how has your respect and admiration changed for the following workers or organizations SUMMARY; Total sample; Weighted. (Top 2 is the net of the top 2 and where starred may be +/- 1% due to rounding)

REPUTATION

LEADERS

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?



Supporting employees with protective wear Not profiteering or increasing prices Maintaining a continuous availability of products/services Paying employees sick pay, paid time off, on fur lough Developing products or services needed in the pandemic, e.g... Providing take-out or delivery options Supporting local communities and the vulnerable/elderly Refunding customers for cancellations Maintaining the highest quality of product/service Making services or support available online Providing frequent and clear communications about actions.. Acting in an environmentally friendly way Lobbying government for stimulus grants or support for... Looking to improve or upgrade their offer Something else - please write None of these

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

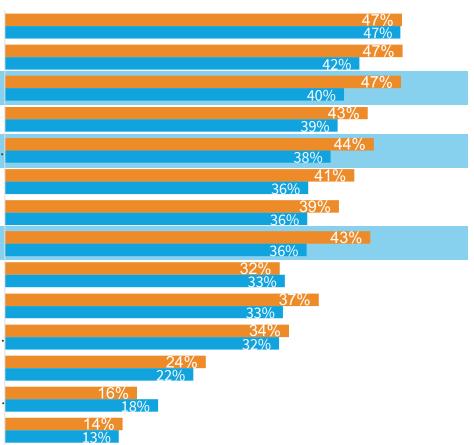
REPUTATION

EADERS



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?



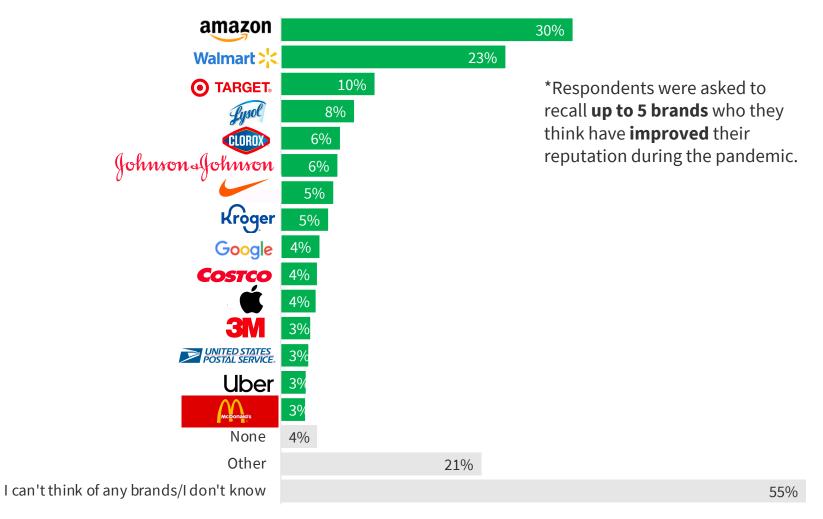
Apr-20 Sep-20

Supporting employees with protective wear Not profiteering or increasing prices Maintaining a continuous availability of products/services Paying employees sick pay, paid time off, on fur lough Developing products or services needed in the pandemic,... Providing take-out or delivery options Supporting local communities and the vulnerable/elderly Refunding customers for cancellations Maintaining the highest quality of product/service Making services or support available online Providing frequent and clear communications about actions.. Acting in an environmentally friendly way Lobbying government for stimulus grants or support for.. Looking to improve or upgrade their offer

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?*



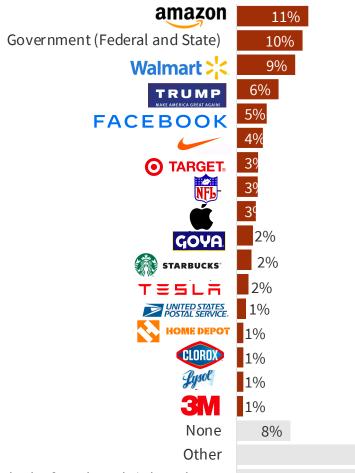
Changing Consumer Trends during the COVID-19 pandemic - September 2020; Q10 Which brands, if any, do you think have improved their reputation during the COVID-19 pandemic? (Total Recode - All brands) - Coded & Combined with DK SUMMARY; Total sample; Weighted - October 2020

REPUTATION

LEADERS

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. REPUTATION LEADERS

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.

I can't think of any brands/I don't know

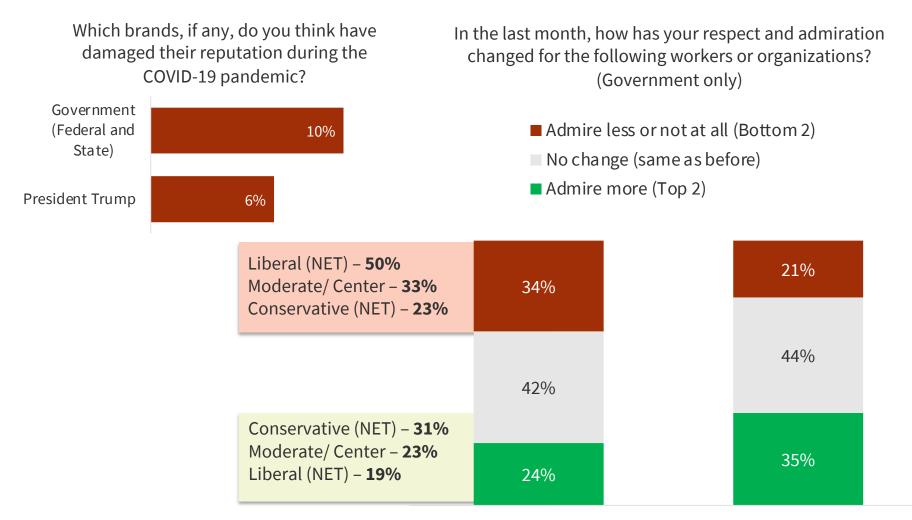
Changing Consumer Trends during the COVID-19 pandemic - September 2020; Q11 Which brands, if any, do you think have damaged their reputation during the COVID-19 pandemic? (Total Recode - all brands) - Coded & Combined with DK SUMMARY; Total sample; Weighted - October 2020

34%

72%

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.





Federal government

State or local government

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.

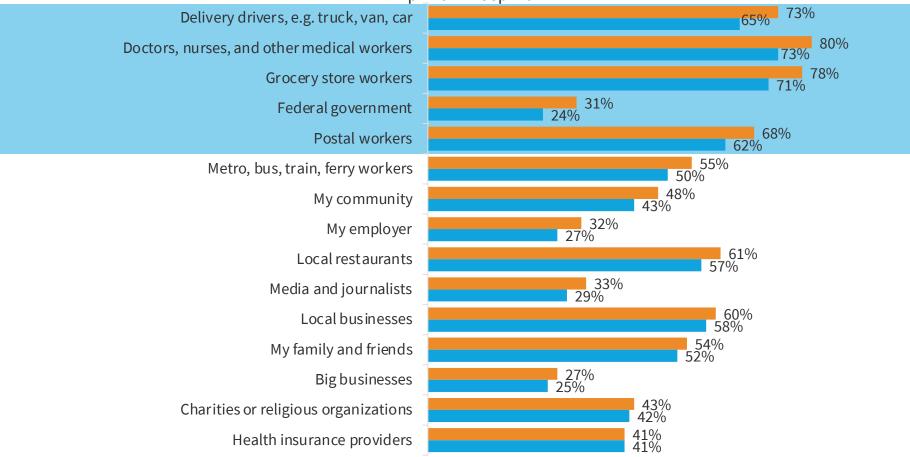


In the last month, how has your respect and admiration changed for the following								
	•		vhat more 🔳 Ad	mire much more	<u>Top 2</u>			
2% 1%	24%	21%		52%	73%			
1%1%	27%	31%	0	40%	71%			
1% 2%	32%		30%	35%	65%			
2% <mark>2</mark> %	34%		28%	34%	62%			
1% 1%	39%		31%	28%	58%*			
1% 2%	39%		32%	25%	57%			
1%1%	45%	/o	23%	29%	52%			
2% 2%	40	6%	26%	24%	50%			
2% 5%		49%	23	% 20%	43%			
3%		52%	22	% 21%	42%*			
4% 5%		50%	20	0% 21%	41%			
8%	13%	44%		22% 139	% 35%			
12%	12%	47	7%	16% 139	% 29%			
7% 49	6	62%		14% 13	% 27%			
169	<mark>⁄o 3%</mark>	55	5%	9% 16%	25%			
6% 1	10%	59 ⁰	%	16%	9% 25%			
18	% 16	%	42%	14%	<u>)%</u> 24%*			
	workers of hange (same 2% 1% 1% 1% 1% 2% 2% % 1% 1% 1% 2% 1% 2% 2% 2% 2% 2% 2% 5% 3% 3% 4% 5% 8% 12% 7% 4% 16%	workers or organizat hange (same as before) 2% 1% 24% 1% 1% 27% 1% 2% 32% 2% 2% 34% 1% 1% 39% 1% 2% 39% 1% 2% 39% 1% 4% 2% 2% 44 2% 5% 3% 8% 13% 4% 5% 8% 13% 12% 12% 7% 4% 6% 10%	workers or organizations? hange (same as before) Admire somew 2% 1% 24% 21% 1% 1% 27% 31% 1% 2% 32% 31% 1% 2% 32% 31% 1% 2% 32% 31% 1% 2% 32% 31% 1% 2% 34% 6 1% 1% 39% 6 1% 2% 39% 6 1% 2% 39% 6 1% 2% 39% 6 1% 2% 39% 6 1% 2% 39% 6 1% 45% 2% 6 2% 2% 46% 6 2% 5% 50% 6 3% 3% 52% 44% 12% 12% 47 7% 4% 62% 6 16% 8% 55 5 6% 10% 59 <	workers or organizations? hange (same as before) Admire somewhat more Ad 2% 1% 24% 21% 1% 1% 27% 31% 1% 2% 32% 30% 2% % 34% 28% 4 1% 2% 32% 30% 4 1% 2% 39% 31% 4 1% 2% 39% 32% 4 1% 2% 39% 32% 4 1% 2% 39% 32% 4 1% 2% 46% 26% 2 2% 5% 49% 23 3 3% 8% 52% 22 4 4 4 12% 12% 47% 2 4	workers or organizations? hange (same as before) Admire somewhat more Admire much more 2% 1% 24% 21% 52% 1% 1% 27% 31% 40% 1% 2% 32% 30% 35% 2% 9% 34% 28% 34% 1% 1% 39% 31% 28% 1% 1% 39% 31% 28% 1% 1% 39% 32% 25% 1% 2% 39% 32% 25% 1% 2% 39% 32% 29% 2% 2% 46% 26% 24% 2% 2% 46% 26% 24% 2% 5% 49% 23% 20% 3% 3% 52% 22% 21% 4% 5% 50% 20% 21% 4% 5% 50% 20% 13 12% 12% 47% 16% 13 16% 10%			

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)



Apr-20 Sep-20

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.

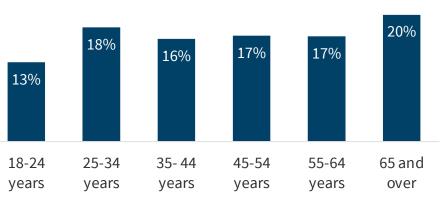
REPUTATION

EADERS

SCREENERS & DEMOGRAPHICS

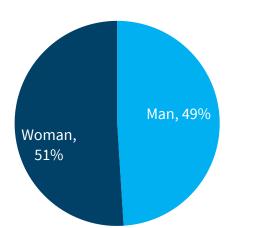
Respondents nationally representative of age, gender and region

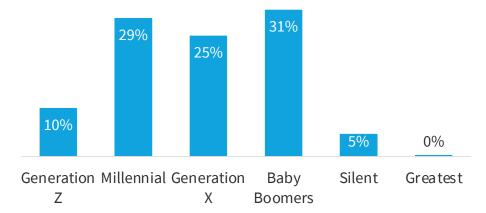




Age Bands

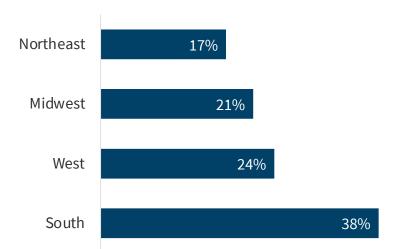
Gender





Age Generations

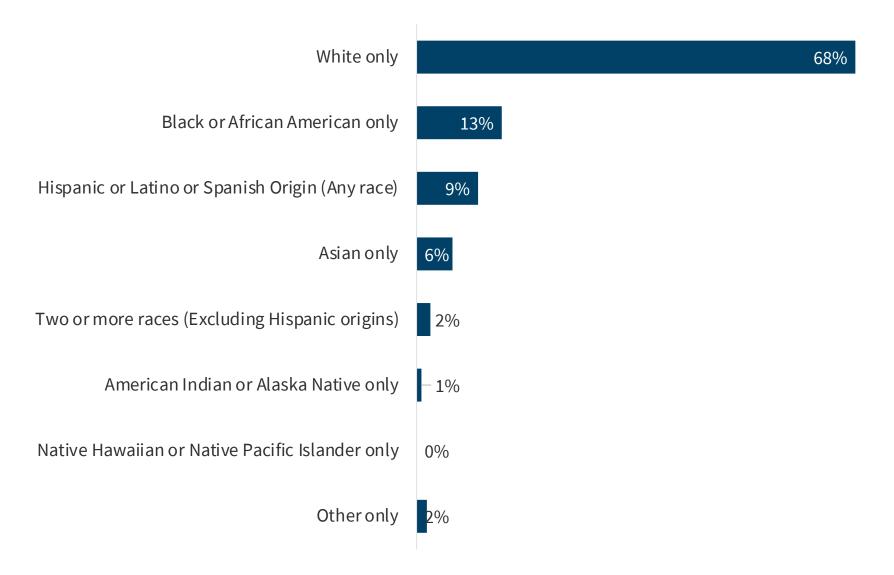
US Region



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



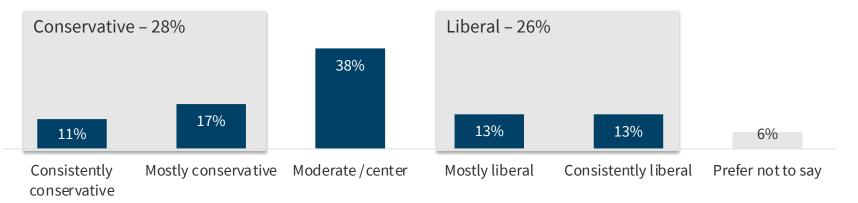
		%	Population
	Man	34%	340
White only	Woman	34%	338
	Man	6%	56
Black or African American only	Woman	7%	74
American Indian or Alaska Native only	Man	0%	2
	Woman	1%	5
	Man	0%	0
Native Hawaiian or Native Pacific Islander only	Woman	0%	0
	Man	4%	39
Hispanic or Latino or Spanish Origin (Any race)	Woman	5%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

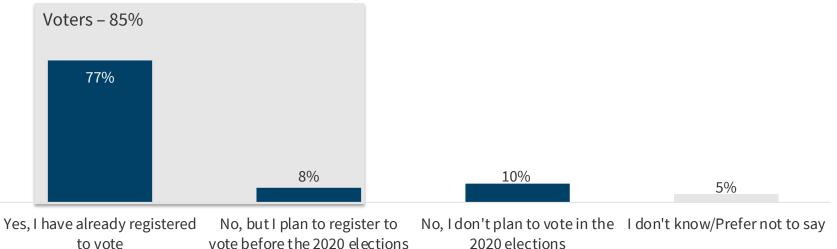
Political affiliation/voting intention







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