

# COVID-19 CONSUMER RESEARCH WAVE 15 EXECUTIVE SUMMARY

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June 13-16, 2020

**MDC** 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 MDC Family**  
Global Chief Marketing Officer, EVP





# WAVE 15

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## WAVE 15 INTRODUCTION

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The following research was conducted between **June 13–16, 2020** by The Harris Poll. Fielded among a nationally representative sample of **1,963** U.S adults, the newest research demonstrates how consumers' perceptions are rapidly shifting as new developments emerge.

Section:

# 01

Topic:

## BELIEVE IN SOMETHING... EVEN IF IT MEANS SACRIFICING EVERYTHING

Introduction:

The markings of social change lie in symbols and iconography, like a toppled statue, a protest song or even an ad. We had polled America's reaction to [Nike's Colin Kaepernick ad](#) in 2018 and re-tested it this past weekend. And American opinions have shifted to support Kaepernick, Nike, and the NFL's new stance on racism:

- Back when [we polled Americans with ESPN](#), we found significant polarization on the ad with young men connecting, while the general public was neutral to negative and even threatening to boycott.
- Now a **new Harris Poll** with The Athletic released Monday ([firewall - see full article here](#)) shows that two years on, **negative impressions of Nike have been cut in half**: from 17% in 2018 to just 9% in 2020.
- Also **Nike Boycotters are disappearing**, especially older and conservative Americans. In 2018, 21% said they would either boycott or just stop buying Nike products -- now that number has dropped to 14% today. And the biggest movers are Seniors 65+ (from 34% 'boycott/don't buy' down to 18%) and Conservatives (from 41% 'boycott/don't buy' down to 24%).

- And of the three major athletic apparel brands, **Nike is the only one to see a strengthening of its reputation** this past weekend since the Kaepernick ad campaign. Today, 54% of the general population have a positive opinion of Nike in our new survey, up 6-pts from 48% in September 2018. Under Armour is down 8-pts to 40%; Adidas: down 1-pt to 51%.
- Also, **Nike's perception is soaring among young men**: in 2018, (54%) of men 18-29 had a positive impression of Nike. Today, that's jumped up to (66%) of young men viewing Nike positively.
- **The NFL is doing better too**: As our NFL data, featured in Axios this morning, shows, in 2018 only 25% of Americans thought that the NFL's response to national anthem protests was positive. In 2020, this increased, up to 32% in light of the ongoing movement.
- Also, **good marks for Roger Goodell**: In the new 2020 survey, America feels **the NFL is taking meaningful steps** with 3 in 4 people (73%) pleased with the action Goodell has taken. Among them: 69% support his statement condemning racism and oppression. Only 31% opposed the statement. Furthermore, 73% say it is a step in the right direction and 68% say it shows that the NFL is making meaningful action to evaluate their role in racism.
- We also asked people to agree or disagree with a number of statements (mutually exclusive). Among them, 66% agree it felt insincere "they are just doing it for publicity," yet a near equal number (64%) say **NFL carries the greatest burden** of any sports league to rectify the damage it now admits it has done.

Implication:

In 2018, Nike's Colin Kaepernick ad was framed in a narrative of division and disrespect. But now it increasingly symbolizes unity and inclusion. Seeing the public (and the NFL) soften on Kaepernick is the start of a conversation, the kind that is happening all across America.



Section:

# 02

Topic:

# THE ESSENTIAL 100

Introduction:

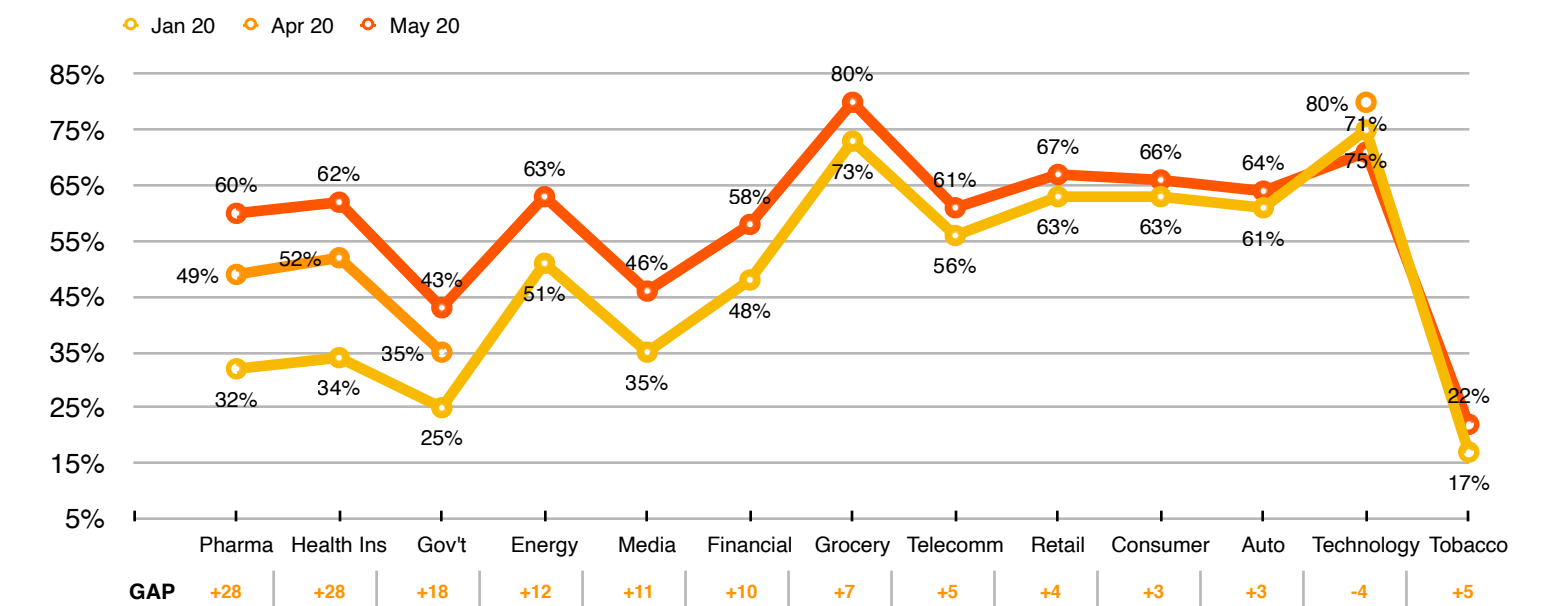
On Friday we launched [The Essential 100](#), a ranking of corporate performance amid the C-19 pandemic. [The Top 10](#), based on the survey, are (in order): **United States Postal Service, Clorox, Google, United Parcel Service, Walmart, Amazon, Purell, Microsoft, FedEx, and CVS.**

The Harris Poll Essential 100 Ranking: Full Composite

1 U.S. Postal Service	26 UnitedHealth Group	51 The Walt Disney Company	76 Cardinal Health
2 Clorox	27 McDonald's	52 Whole Foods	77 American Express
3 Google	28 3M	53 Delta Air Lines	78 NFL
4 UPS	29 Target	54 Toyota	79 AT&T
5 Walmart	30 Chick-fil-A	55 Southwest Airlines	80 NBA
6 Amazon	31 General Mills	56 Xfinity	81 MLB
7 Purell	32 Best Buy	57 Cottonelle	82 Pfizer
8 Microsoft	33 General Electric	58 United Airlines	83 Door Dash
9 FedEx	34 Costco	59 Intel	84 Marriott
10 CVS	35 Domino's	60 Perdue Farms	85 T-Mobile
11 Samsung	36 Nestlé	61 PepsiCo	86 Public
12 Johnson & Johnson	37 Campbell's	62 IBM	87 Honeywell
13 YouTube	38 Kroger	63 Hewlett-Packard Enterprise	88 Bank of America
14 Coca-Cola	39 Tyson Foods	64 U.S. Bank	89 Kaiser Permanente
15 Walgreens	40 Bayer	65 Scott	90 GlaxoSmithKline
16 Netflix	41 General Motors	66 Trader Joe's	91 Aetna
17 Apple	42 Verizon	67 Hulu	92 eBay
18 Visa	43 Anthem Health	68 American Airlines	93 Macy's
19 Mastercard	44 Aldi	69 Little Caesar's	94 Starbucks
20 The Kraft Heinz Company	45 Dollar General	70 Smithfield Foods	95 Nissan
21 Lowe's	46 Dell	71 Humana	96 Facebook
22 Procter & Gamble	47 Pizza Hut	72 Papa John's	97 McKesson
23 The Home Depot	48 Sam's Club	73 Nike	98 Conagra
24 The Hershey Company	49 Sony	74 Zoom Video	99 Capital One
25 Ford	50 Burger King	75 Boeing	100 ESPN

- This ranking which was featured in [Alan Murray's CEO Daily](#) on Monday measures corporate responsiveness, trust, integral and lasting ability to find solutions to the pandemic. The major themes underlying corporate reputation right now include America's preference for large logistics-driven, resourced, and innovative companies because they represent safety, reliability, and proven performance. Logistics meant **things kept working in daily life**, despite COVID and the economic shutdown.
- For instance, many of the top performing companies were visible throughout the crisis (delivery services) or pivoting to different goods and services, reinforcing supply chains, or seeking cures for the deadly virus.
- The other thing: Many reputation studies cite the erosion of trust in Corporate America. We see exactly the opposite. This chart shows how corporate reputation is rising across all industries, even pharma, financial services, and tech.

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



- You can download the full deck [here](#).

## Implication:

In the global financial crisis, Corporate America was part of the problem. Now, they are part of the solution. Reputations are being remade during these unprecedented challenges, even industries that held longstanding headwinds like pharma and financial services. We will have a new **Axios-Harris Poll 100 study of corporate reputation** coming out in late July.

[Read More](#)



Section:

# 03

Topic:

## HOW TO RESPOND IN THE AGE OF UNREST

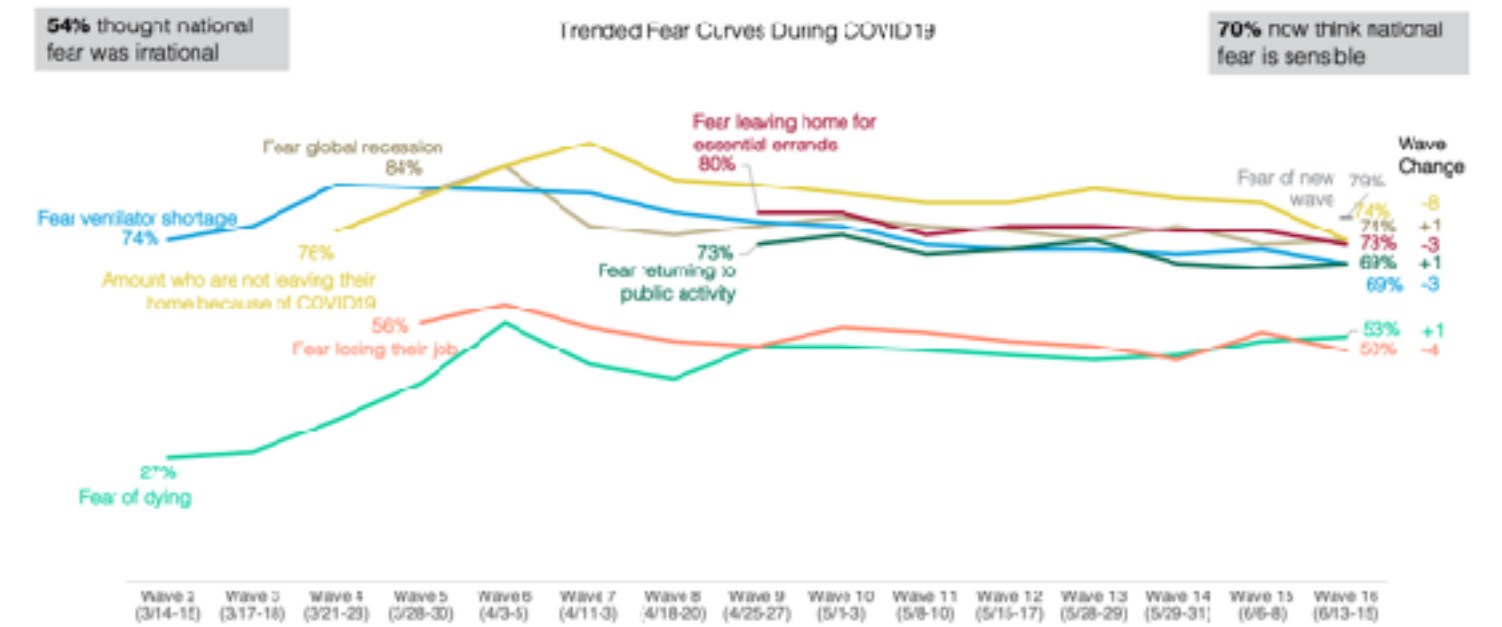
Introduction:

We are living through a moment in history. One marked by social unrest amidst an unprecedented fifty-state closure with activists in the streets of America calling out for racial equality. Here we look at the number of social and economic obstacles society face and the role that companies and brands can play in guiding America forward.

- Let's start with the number one obstacle to a full re-opening, which is the virus itself. As of this weekend, C-19 cases are climbing in twenty-two states resulting in 79% of Americans [this weekend](#) saying they **fear a second wave of coronavirus**.
- In an [Axios poll yesterday](#), 8 in 10 Americans say they are concerned about a second wave of the coronavirus, with large majorities saying they'll resume social distancing, dial back shopping and keep their kids out of school if it happens. In our data, 70% feel the fear around C-19 is justified.
- But people are beginning to venture out, reflected in a **drop of those fearful to leave their house for essential errands** at 73% this week, which was in the eighties as of two weeks ago. Still, Americans face the twin fears of dying (53%) or losing their jobs (50%).

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

The Task for Marketers: Lifting the Curtain of Fear



- **American patience is also on the wane.** While more than three quarters (77%) say their state has partially reopened, a fewer number (59%) support their state's approach to re-opening. In fact, more than 2 in 5 (41%) oppose their state's approach to re-opening, especially in the South (46%). While more than three quarters of Americans (77%) think the **lockdowns were effective in their area**, a fifth think they were not (20%). Gen Z/Millennials are more likely than Seniors to think the lockdowns were not effective (28% vs. 16%), or to say **they are not concerned about a new wave of COVID-19** outbreak in their area (26% vs. 17%).
- **Women are more cautious than men** and are more likely to say they plan on continuing to wear PPE in public (46% vs. 39%) and plan on continuing to save more and spend less (53% vs. 41%) in the long term.
- At the same time, the nation is coming face-to-face with a parallel wave of social unrest driven by racial injustice, and Corporate America is now pledging to play a bigger role. Some are being pushed by employees or by a fear of losing customers. The issues companies are wrestling with range from inequalities in hiring, pay and promotion, [fostering toxic workplace cultures](#) and consumer discrimination, among others.



Section:

# 03

- In our new Harris Poll, Americans feel their **spending power can bring about change**. More than 3 in 5 Americans (63%) say they are more likely to buy from companies and brands that **contribute to organizations/causes that combat racism** while over two-thirds (67%) say companies/brands should **ensure businesses/clients they do business with share similar standards** when it comes to combating racial inequality. Women are more likely than men to say this (70% vs. 63%) as are Black People (73% vs. 65%).
- And a third of Americans (32%) believe **companies/brands have not done enough to increase diversity in their leadership** while (57%) say they should **respond publicly to protests and rising racial tensions**.

## Implication:

How do you respond in an age of anxiety? Carefully and confidently: Right now, Americans want authenticity and action, 74% think companies should speak out on C-19 and 57% say companies should incorporate their views into advertising. Americans also want inclusion, 88% say racial equality is an important issue to them, personally. But corporate values must be reflected on the inside first and shared in a meaningful way, as 26% say companies advertising during C-19 are just doing it for publicity. For Corporate America, responding in this day and age is not about what you say, it's about what you do.



Section:

# 04

Topic:

## TECH LASH-LASH

Introduction:

Since the outset of the pandemic, the technology sector has received a strong and consistent approval in their C-19 response, with 55% of Americans saying technology has had a good reaction to the pandemic. But the backlash on the use of facial recognition by law enforcement and the act of censoring (or not) misleading information is but one litmus test for tech's promoting of civil rights.

- **Americans will give up privacy to fight C-19:** More than 3 in 5 Americans (61%) are willing to share their contact information with the government and 81% support using their data to help trace coronavirus cases. **In fact, fighting C-19 has become part of American patriotism:** 85% say Americans have a responsibility to each other to take preventative measures to limit the spread of C-19.
- **But, there is a new backlash on facial recognition technology amid the fight for racial equality:** Just this week [Senators voiced concern for the technology being used on BLM protesters](#), citing misuse during the 2015 protests in Baltimore following the death of Freddie Gray in police custody, where [law enforcement used facial recognition](#) to identify Facebook profiles and target arrests for outstanding warrants.
- **Tech is now pivoting to support equality and civil rights:** Just this week, [IBM announced](#) it will stop developing facial recognition technology, [Amazon announced](#) a one-year pause on letting police departments use its facial recognition tool, and [Microsoft banned the sale of facial recognition technology](#) to police without federal regulation. Washington Post deep dives into how [Black Lives Matter could change facial recognition forever — if Big Tech doesn't stand in the way](#).
- **Meanwhile, social media faces backlash on transparency:** While there is growing support for tech in the pandemic, our data reveals **growing skepticism of social media** platforms; only a third (36%) say social media platforms are trustworthy while the majority of Americans (53%) say the information in their **social media news feeds is mostly misleading**.

- **Early signs of social media political delineation:** After Twitter labeled the Presidents' tweets with a fact check, we asked if people think social media platforms should or should not censor information they believe to be false/ misleading and (70%) of Democrats say that **social media companies should censor information** they believe to be false/ misleading, while only 57% of Republicans agreed.
- Scott Galloway [has a very interesting take](#) on how social media brands like Twitter and Facebook might start to align along political division.

Implication:

Hey tech don't blow this moment! Americans see technology as critical to solving C-19, fighting racism and being essential to our everyday lives—especially while sheltered at home. But the industry seems to be drawing lines on ethics between those relying on advertising revenue vs. subscription; the latter being more ethical because they don't have to monetize rage and division for profits. Why can't everything have a paywall?



Section:

# 05

Topic:

## THE TELEHEALTH REVOLUTION IS HERE

Introduction:

Although states have begun to lift stay-at-home restrictions, Americans remain cautious and seek to minimize unnecessary social contact. Before the coronavirus pandemic, Americans were slow to pick up on the telehealth trend. Yet according to analysts at [Forrester](#), social distancing measures at doctor's offices and hospitals could push virtual care visits to the 1 billion mark by the end of 2020. In an effort to dive deeper and understand the future of healthcare, The Harris Poll has tracked the significant rise in demand for telehealth services across different applications and demographics.

- After the first six weeks of lockdown, only 32% of Americans **had used telehealth services**; less than a month later, we see a significant jump in demand to 44%. And among those users 70% claim they used it for the first time during the pandemic.
- Since the end of April, new users of telehealth have increased from 15% to 27% and is consistent across demographic groups. Usage is also up among men from 37% to 50%. Additionally, younger adults are still more likely to have used telehealth than older people yet there is a notable increase in usage among Americans 65+ during this time frame from 18% to 28%.

- Over half of Americans are still **reluctant to engage in a traditional health care setting** (for non-emergency visits) unless specific conditions are met and nearly two in ten (18%) say they **wouldn't go to a doctor's office for elective healthcare** under any circumstances. As such, it's no surprise that **telehealth utilization rates are increasing not only overall, but also in frequency of use**. And since the pandemic began, nearly four in ten (37%) have used telehealth services **three or more times**.
- Overall, telehealth continues to be used for a **diverse set of applications** including mental health services, diagnostic visits (for non-C-19 and C-19-related conditions), nutritional consultations and physical/occupational therapy sessions. There has been an increase in **ongoing management of existing chronic conditions** and remote monitoring of chronic health, as well as a particularly notable uptick among those in the 65+ age group for using telehealth for ongoing management. (Wave 1: 58% vs. 64% in Wave 2).

Implication:

As in our initial wave, nearly eight in ten (79%) of those who have used telehealth indicate that they are likely to continue doing so after the pandemic subsides - with 40% of users say, "very likely". While the data is positive across many aspects of telehealth services, there is one variable that emerges as a key driver of Americans' willingness to keep using telehealth services – and that is that it's simply effective. When examining the data via regression analysis, the fact that telehealth is able to 'effectively address my health concerns' carries twice the impact of most of the other items evaluated. In response to this demand, politicians and business leaders need to jointly decide on the future policies regarding technology and reimbursement for telehealth services, particularly among employer-based plans.

[Read More](#)



# Questions?

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**KNOWLEDGE IS POWER**

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