PORTER NOVELLI
COVID-19 TRACKER:
Reframing Purpose in and after the Crisis
WAVE V

JUNE 2020
We are proud to share the fifth wave of the Porter Novelli COVID-19 Tracker – a benchmark study examining American expectations of companies during the coronavirus pandemic. While coronavirus still permeates communities, many parts of the nation enter a new phase of reopening. However, today, the United States finds itself in a time of increasing complexity not just because of this historic pandemic but also underlying racial tensions that have rose to the surface – with growing awareness to police violence against the Black community as well as the disproportionate impact of COVID-19 on minorities. This presents a challenge for companies – we must think toward the future while addressing the urgent needs of today.

This moment will have a profound impact on so many aspects of life – including how Purpose-driven businesses must act moving forward. The fifth wave of the Tracker unpacks this notion, examining how COVID-19 has changed the trajectory of responsible business. In this report, we will look to how the current crisis has reshaped American expectations, while increasing the urgency to address some issues.

The latest wave of the Porter Novelli COVID-19 Tracker reveals one final insight. Although Purpose-driven business may be reshaped by the current crisis, its role in society has never been stronger. The mandate from Americans has never been clearer, the need never more urgent and the stakes never higher. We hope the data and insights gleaned in this report will equip business leaders to act swiftly for the crisis of today and confidently in transforming business moving forward.

Introducing the Porter Novelli COVID-19 Tracker: WAVE V
There is no question that the coronavirus pandemic has disrupted so many aspects of the world we live in, and responsible business is no exception. As companies move forward on Purpose-driven efforts, Americans believe companies must acknowledge the profound impact of the pandemic on our world. In fact, six-in-10 (60%) Americans think companies must modernize current responsibility programs to reflect COVID-19 specific issues and audiences.

Still, Americans recognize the important work that was already in progress prior to the pandemic – and believe companies must continue on that track. Only 19 percent of Americans believe companies should completely refocus Purpose initiatives to address COVID-19 issues specifically. Most, felt companies must continue to support existing programs, while adjusting to include issues specifically impacted by COVID-19.
Roadmap to pursuing purpose

HOW COVID-19 HAS CHANGED THE PURPOSE LANDSCAPE

For businesses that already support social or environmental issues, Americans believe they should continue to support these issues as the pandemic subsides by:

- **52%** Continue to support programs already in progress before COVID-19, but adjust to include issues specifically impacted by COVID-19
- **29%** Continue to support programs already in progress before COVID-19
- **19%** Completely refocus on COVID-19 issues specifically
Roadmap to pursuing purpose

HOW COVID-19 HAS CHANGED THE PURPOSE LANDSCAPE

Although COVID-19 concerns are still very much top-of-mind, Americans are anxious about other important issues that may be affected or even neglected in light of the pandemic. Nearly half of Americans feel coronavirus will cause progress on other important issues to slow. This apprehension only highlights how companies must continue pushing other social and environmental initiatives even as the pandemic continues. In fact, 55 percent want to know how companies are continuing progress against other social or environmental initiatives beyond the immediate and urgent response to COVID-19.

- 46% are concerned COVID-19 will cause progress on other important issues (e.g., climate change) to slow
- 55% want to know how companies are continuing progress against other social or environmental initiatives beyond COVID-19
Roadmap to pursuing purpose

HOW COVID-19 HAS CHANGED THE PURPOSE LANDSCAPE

With the expectation that companies continue to support myriad issues and causes, companies should know they have the permission to talk about these topics – with sensitivity. Half of Americans now believe companies should start communicating around other Purpose-driven initiatives. Still, companies should understand and recognize the new landscape we face when communicating. Nearly six-in-10 Americans think companies must acknowledge the pandemic when talking about other issues.

53% think it’s okay for companies to start communicating around other social or environmental initiatives other than COVID-19 response efforts

58% think companies need to acknowledge the pandemic when talking about other social or environmental issues
Issues in focus

HOW COVID-19 HAS CHANGED THE ISSUES AMERICANS CARE ABOUT

The mandate from Americans is clear. Companies should continue making progress on critical social and environmental issues, even in the face of the pandemic. Yet, COVID-19 has created new challenges, heightened needs and shone a brighter light on existing ills. Americans are concerned a number of issues will be negatively impacted by the COVID-19 crisis — but most acutely, economic development, healthcare, mental health and senior safety. Companies must spend time assessing how existing Purpose platforms can be reimagined or restructured to address or serve these issues and audiences moving forward.

Companies must reassess Purpose platforms
# Issues in focus

## HOW COVID-19 HAS CHANGED THE ISSUES AMERICANS CARE ABOUT

Americans are most concerned the following issues will be negatively impacted by the COVID-19 crisis:

<table>
<thead>
<tr>
<th>Issue</th>
<th>WAVE V</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economic Development</td>
<td>43%</td>
</tr>
<tr>
<td>Healthcare</td>
<td>39%</td>
</tr>
<tr>
<td>Mental Health and Wellbeing</td>
<td>39%</td>
</tr>
<tr>
<td>Senior Safety</td>
<td>35%</td>
</tr>
<tr>
<td>Education</td>
<td>31%</td>
</tr>
<tr>
<td>Hunger</td>
<td>27%</td>
</tr>
<tr>
<td>Housing</td>
<td>20%</td>
</tr>
<tr>
<td>Environment</td>
<td>16%</td>
</tr>
</tbody>
</table>
Issues in focus

HOW COVID-19 HAS CHANGED THE ISSUES AMERICANS CARE ABOUT

Even with the emergence of new or underserved concerns in a COVID-19 reality, Americans are steadfast in their belief that companies have a role to play in addressing a diverse range of important issues. In fact, the urgency for companies to address these issues has, for the most part, increased from our 2018 benchmark data. Perhaps not surprisingly, access to healthcare saw an eight percent increase, which was in lock step with employee health and safety as top issues (an addition to our benchmark list). However, sexual harassment, racial equality and fake news all saw marked increases. We expect the urgency around these issues to continue to grow, as this data was fielded before the most recent headline news related to the topic of race and ongoing injustice. Further, six-in-10 Americans now believe companies must address all these issues, perhaps signifying how the pandemic has increased the importance of Purpose-led work in general.
## Issues in focus

### HOW COVID-19 HAS CHANGED THE ISSUES AMERICANS CARE ABOUT

Americans believe it is important for companies to address the following issues active in the news today:

<table>
<thead>
<tr>
<th>Issue</th>
<th>WAVE V</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access to Healthcare</td>
<td>92%</td>
<td>85%</td>
</tr>
<tr>
<td>Employee Health and Safety</td>
<td>92%</td>
<td>/</td>
</tr>
<tr>
<td>Privacy and Internet Security</td>
<td>89%</td>
<td>86%</td>
</tr>
<tr>
<td>Sexual Harassment</td>
<td>87%</td>
<td>83%</td>
</tr>
<tr>
<td>Domestic Job Growth</td>
<td>86%</td>
<td>86%</td>
</tr>
<tr>
<td>Racial Equality</td>
<td>85%</td>
<td>81%</td>
</tr>
<tr>
<td>Women’s Rights</td>
<td>83%</td>
<td>80%</td>
</tr>
<tr>
<td>Cost of Higher Education</td>
<td>74%</td>
<td>76%</td>
</tr>
<tr>
<td>Climate Change</td>
<td>73%</td>
<td>73%</td>
</tr>
<tr>
<td>Immigration</td>
<td>72%</td>
<td>74%</td>
</tr>
<tr>
<td>Gun Control</td>
<td>71%</td>
<td>69%</td>
</tr>
<tr>
<td>LGBTQ+ Rights</td>
<td>65%</td>
<td>63%</td>
</tr>
<tr>
<td>Fake News</td>
<td>62%</td>
<td>56%</td>
</tr>
</tbody>
</table>
Issues in focus

HOW COVID-19 HAS CHANGED THE ISSUES AMERICANS CARE ABOUT

However, it remains a balancing act for companies to acknowledge our current environment while pursuing other Purpose-driven initiatives. In fact, more than half of Americans say they’re more likely to be supportive of a company’s other work if they know that company has also put resources against COVID-19 relief and solutions.

54%

are more likely to be supportive of a company’s social and environmental initiatives if they know a company has also put resources against COVID-19 relief or solutions.
A call for business action now

AMERICAN OPTIMISM WANE IN FACE OF CONTINUED CRISIS

As the pandemic continues to keep its grip on the United States, with increasingly complex consequences, there is a red flag for companies. Although Americans still believe in business to create better and faster solutions, our research indicates a waning enthusiasm. Companies should take this as a moment to re-up their commitment to providing COVID-19-specific relief and reassess how to use core competencies to address the current crisis. Americans look to companies to act swiftly - and with scale.
A call for business action now

**AMERICAN OPTIMISM WANE IN FACE OF CONTINUED CRISIS**

I think business can create better/faster coronavirus solutions than government

I have more faith in business to solve the coronavirus pandemic than other entities (e.g., government, nonprofits)

I feel better about companies that publicly announce what they are doing to provide coronavirus support
A call for business action now

AMERICAN OPTIMISM WANE IN FACE OF CONTINUED CRISIS

Still, the level of trust for companies to do the right thing has remained steady. With little change over three waves, Americans trust business over government to make the right call about reopening the economy. At the same time, companies must proceed with extreme caution, as four-in-10 (41%) American employees are concerned their employer will make them go back to work before they feel ready. Companies must be careful not to break this hard-earned level of trust during a sensitive time.

I trust that state/federal governments will make the right call about when to reopen the economy

I trust businesses will make the right call about when to reopen the economy
Information and industries

THE ORGANIZATIONS GAINING TRUST & LOYALTY

With new phases of the pandemic in play, Americans seek out critical information on how to navigate this new reality. However, the Tracker reveals a downward trend in sources of trusted information. While media remains at the top of the list with a smaller overall dip, state government has seen an 18 percent decrease – and federal government has dropped from its place as a top source in Wave I, representing a 29 percent decrease from early April.
Information and industries

THE ORGANIZATIONS GAINING TRUST & LOYALTY

Most trusted sources for coronavirus information:

- **MEDIA**
  - Wave I: 52%
  - Wave II: 51%
  - Wave III: 48%
  - Wave IV: 47%
  - Wave V: 47%

- **STATE GOVERNMENT** (including departments of health)
  - Wave I: 56%
  - Wave II: 54%
  - Wave III: 53%
  - Wave IV: 47%
  - Wave V: 46%

- **LOCAL GOVERNMENT** (including departments of health)
  - Wave I: 50%
  - Wave II: 45%
  - Wave III: 47%
  - Wave IV: 43%
  - Wave V: 43%

- **FEDERAL GOVERNMENT** (including departments of health)
  - Wave I: 52%
  - Wave II: 47%
  - Wave III: 42%
  - Wave IV: 40%
  - Wave V: 37%

- **SOCIAL MEDIA**
  - Wave I: 25%
  - Wave II: 24%
  - Wave III: 24%
  - Wave IV: 22%
  - Wave V: 25%

- **NONPROFIT ORGANIZATIONS/NGOS**
  - Wave I: 12%
  - Wave II: 15%
  - Wave III: 14%
  - Wave IV: 14%
  - Wave V: 17%
Information and industries

THE ORGANIZATIONS GAINING TRUST & LOYALTY

Most trusted sources for coronavirus information (continued):

- RELIGIOUS/FAITH-BASED ORGANIZATIONS:
  - WAVE I: 9%
  - WAVE II: 10%
  - WAVE III: 7%
  - WAVE IV: 9%
  - WAVE V: 10%

- COMPANIES OR BUSINESSES:
  - WAVE I: 9%
  - WAVE II: 16%
  - WAVE III: 14%
  - WAVE IV: 15%
  - WAVE V: 15%
Information and industries

THE ORGANIZATIONS GAINING TRUST & LOYALTY

The top industries doing the best job supporting COVID-19 efforts remain steady, but short-term gains and drops have been revealed over time. This could be attributed to news stories gaining media attention over short periods of time, to be overtaken with different areas of focus as the news cycle evolves. Still, Americans feel the health and wellness and food and beverage industries continue to excel in relief efforts.

Industries Americans believe are doing the best job providing coronavirus support:
Methodology

Porter Novelli fielded a PN View: 360 survey to gather people’s insights regarding the coronavirus (COVID-19). The survey was fielded online using Engine’s online CARAVAN® Omnibus survey in biweekly waves between April 1-May 29, 2020 and a total sample of 1,003 U.S. general market adults was collected. The data were weighted to U.S. Census population estimates and the margin of error is +/- 3.1% at a 95% confidence level.

About Porter Novelli

Porter Novelli is a global purpose communications consultancy born from the idea that the art of communication can advance society. More than 45 years ago, we opened our doors – and people’s eyes and minds – for brands driven to make a positive impact. Today, we believe that organizations must find, live and tell their purpose in order to thrive. Those companies will motivate action, secure loyalty and encourage advocacy — all in service to a healthier bottom line. Porter Novelli is a part of the Omnicom Public Relations Group.

For more information about this research or for a custom presentation, please contact your account team or marketing@porternovelli.com.
IN A TIME OF CRISIS, AMERICANS LOOK TO COMPANIES FOR HELP MAKING OR BREAKING REPUTATION COMMUNICATIONS IN THE TIME OF COVID-19 EMPLOYEES LOOK TO THEIR EMPLOYERS WHERE AMERICANS GIVE CREDIT WHAT COMPANIES CAN DO. NOW.