

THE STAGWELL GROUP

investing
in the art
& science
of creativity

SKDKnickerbocker



CODE AND THEORY

FORWARDPMX

FINN
PARTNERS

WYECOMM

STAGWELLTECH

The Harris Poll

Targeted
Victory

Wolfgang
LA



harrisx

OBSERVATORY



Ink

MULTIVIEW

SLOANE & COMPANY

MAY 13 | 2020

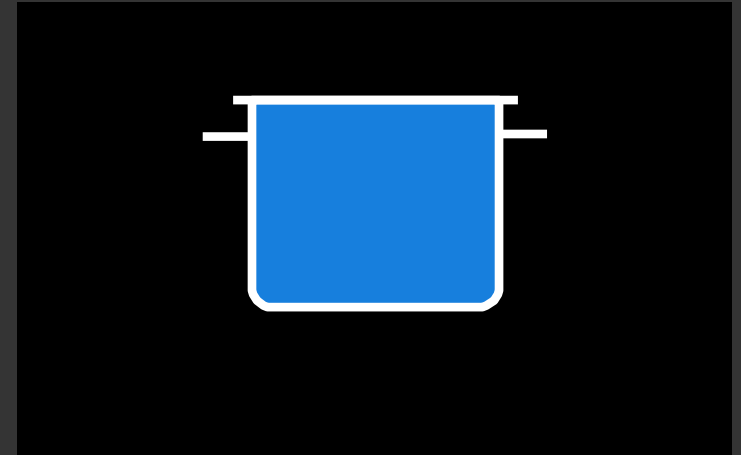
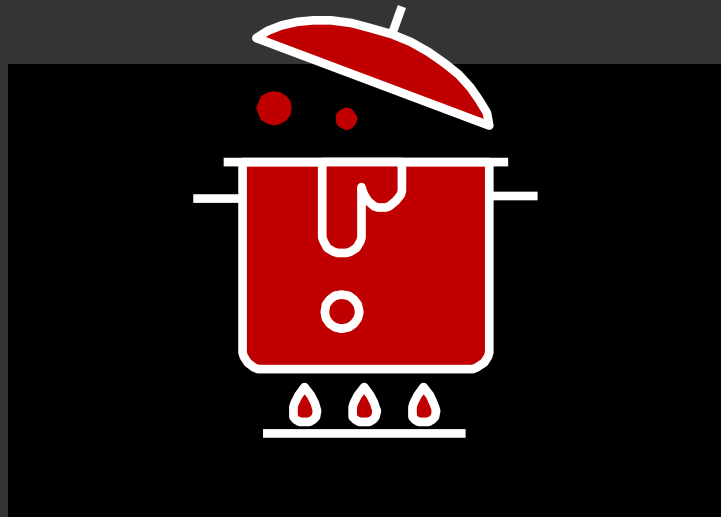
2 WAYS TO GET THROUGH THE CRISIS



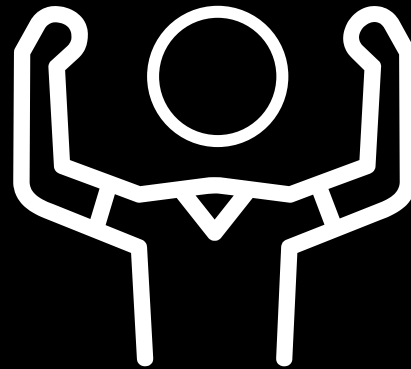
2 GENERATIONS FACING THE CRISIS



3 KINDS OF BUSINESSES DEALING WITH THE CRISIS

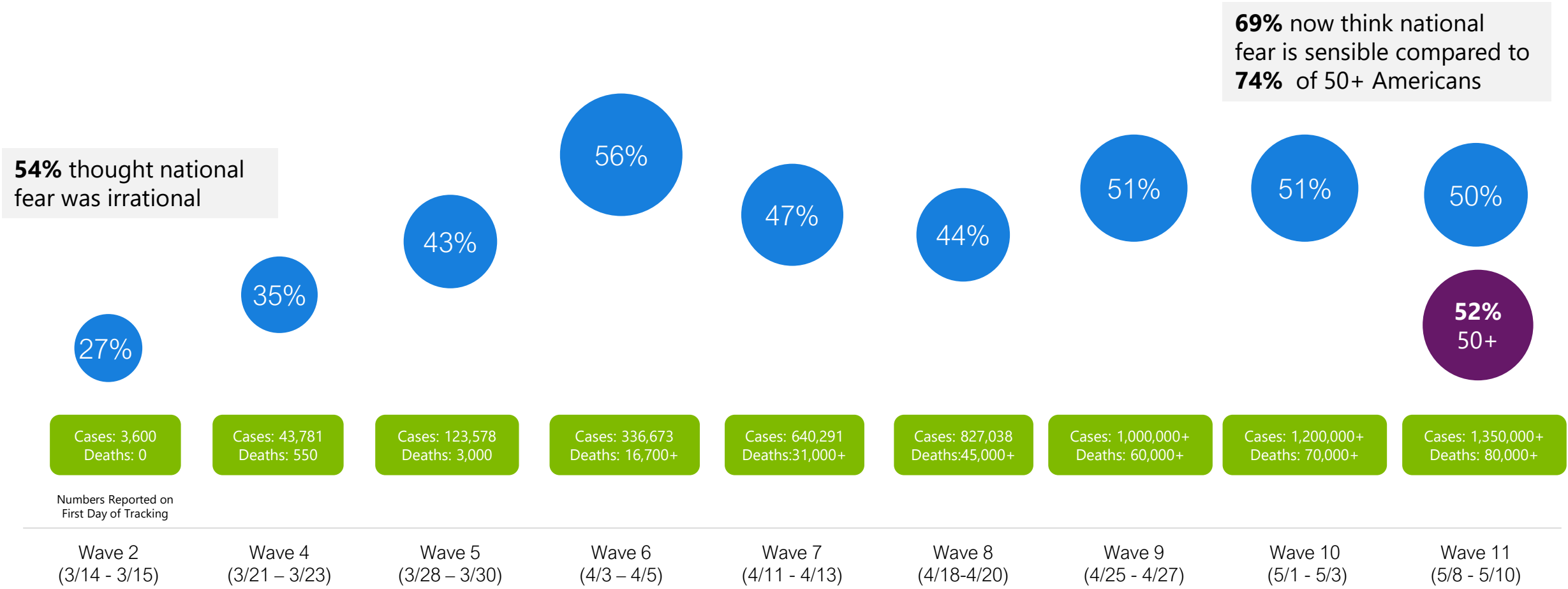


2 EMOTIONS OF THE CRISIS



AMERICAN FEAR REMAINS EVER-PRESENT EVEN AS STATES BEGIN TO REOPEN

Which of the following is true for you? "I fear I could die as a result of contracting coronavirus"

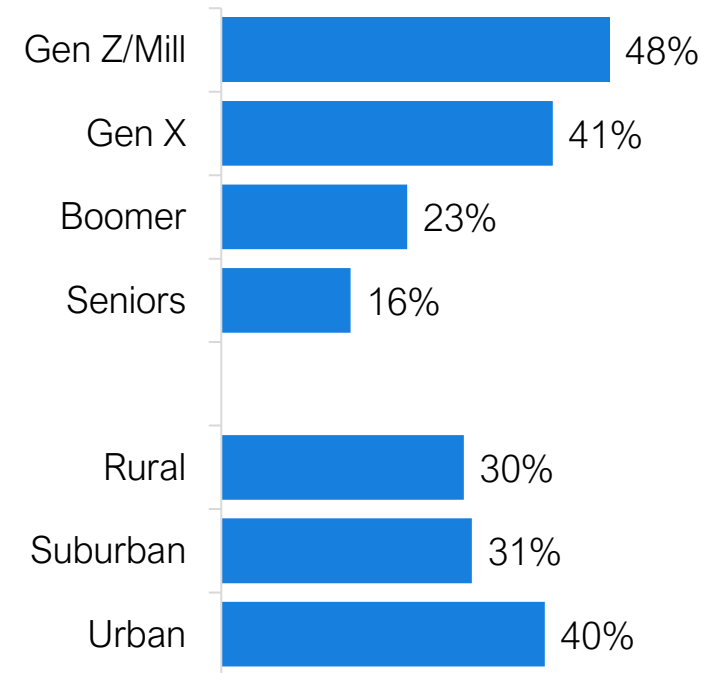
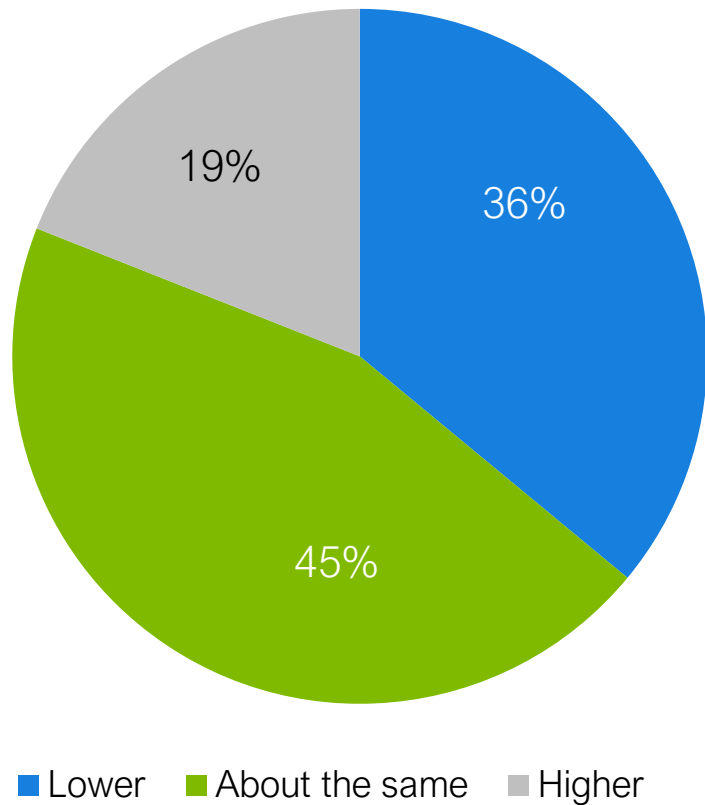


Source: Harris Poll COVID19 Tracker Wave 2-10
 BASE: GENERAL PUBLIC W2 (2020); W3 (2019); W4 (2023) W5 (2016); W6 (1993); W7 (2013); W8 (2029); W9 (2050); W10 (2039); W11 (2030)
 Q18 Which of the following is true for you? I fear I could die as a result of contracting coronavirus/ I do not fear that I could die as a result of contracting coronavirus

AND OVER A THIRD EXPECT LOWER INCOME IN 2020 AND SEEKING NEW SOURCES

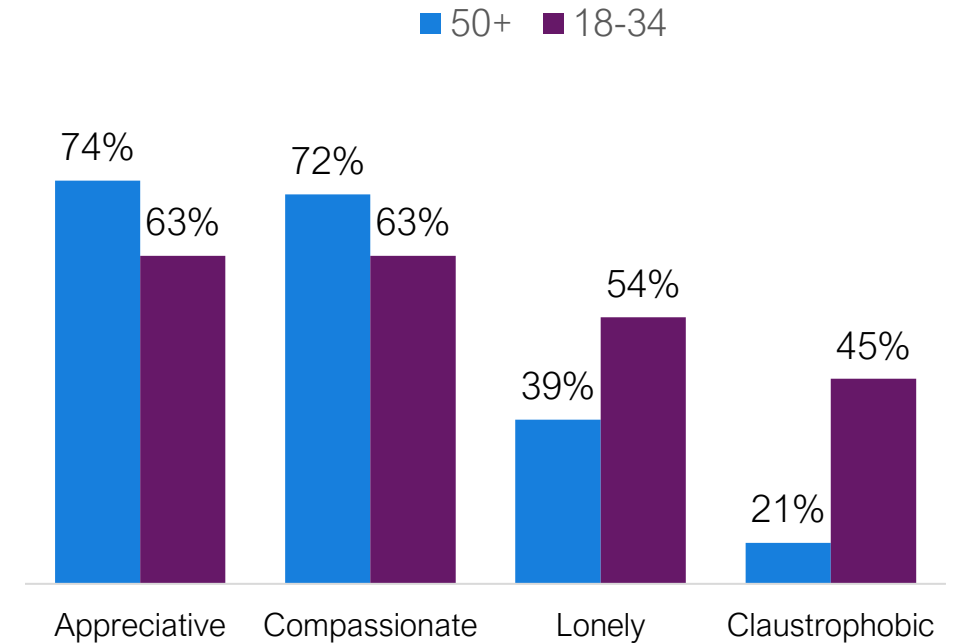
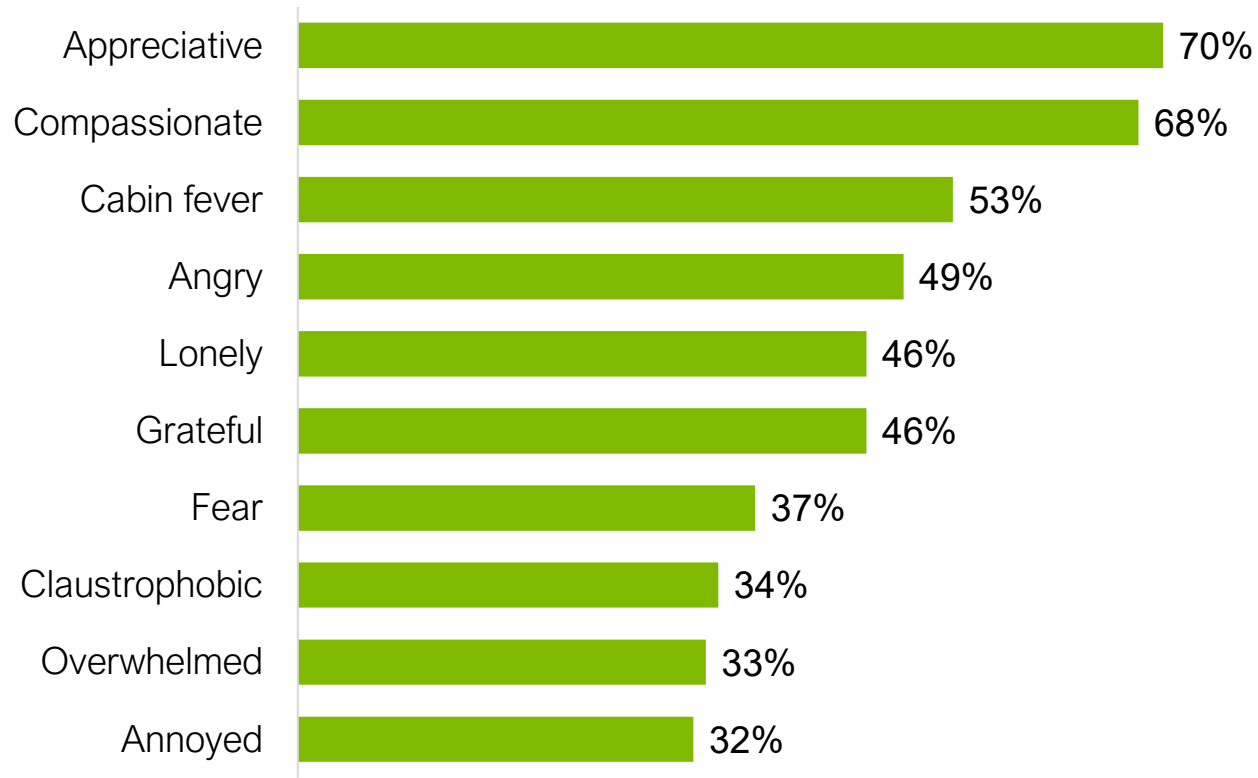
Do you think your income in 2020 will be lower, higher or about the same as it was in 2019?

34% have sought out new/additional sources of income



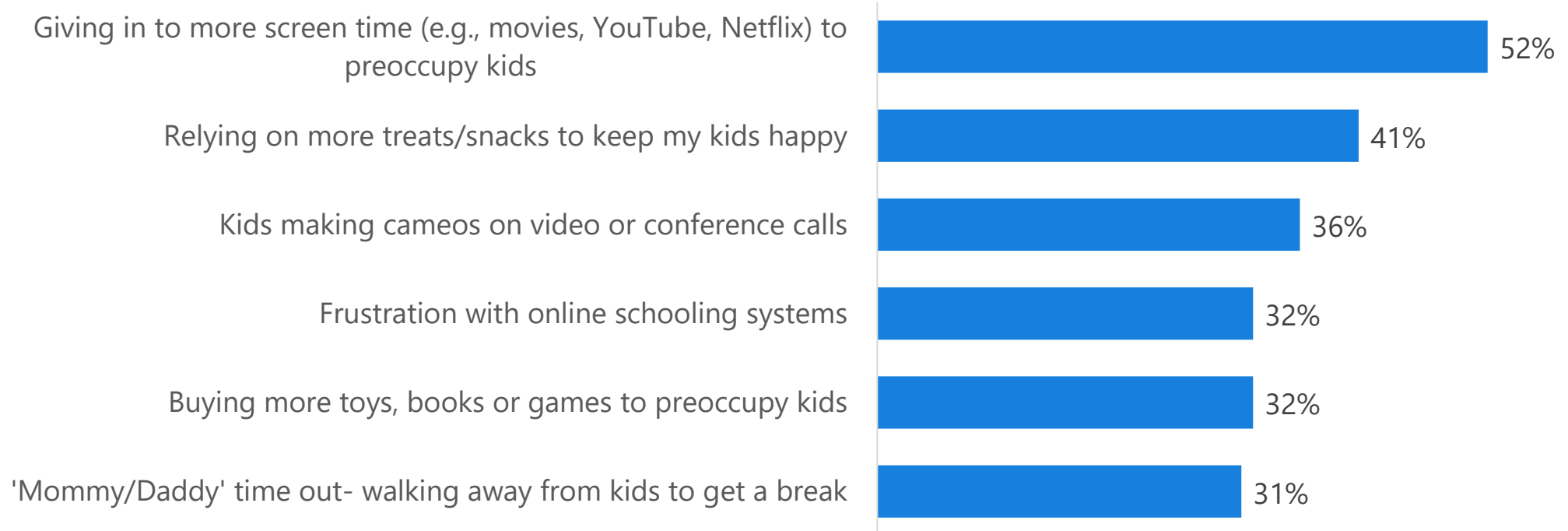
WE ARE EXPERIENCING A MIX OF EMOTIONS UNDER QUARANTINE

Have you felt any of the following since the stay-home orders have gone into effect?



AMERICANS ARE TUNING IN, PARENTS ARE TUNING OUT

As a parent, have you experienced any of the following since the stay-home orders have gone into effect? % Yes



Source: Harris Poll COVID19 Tracker Wave 2-8

BASE: PARENT W7 (1099) ; W8 (1131)

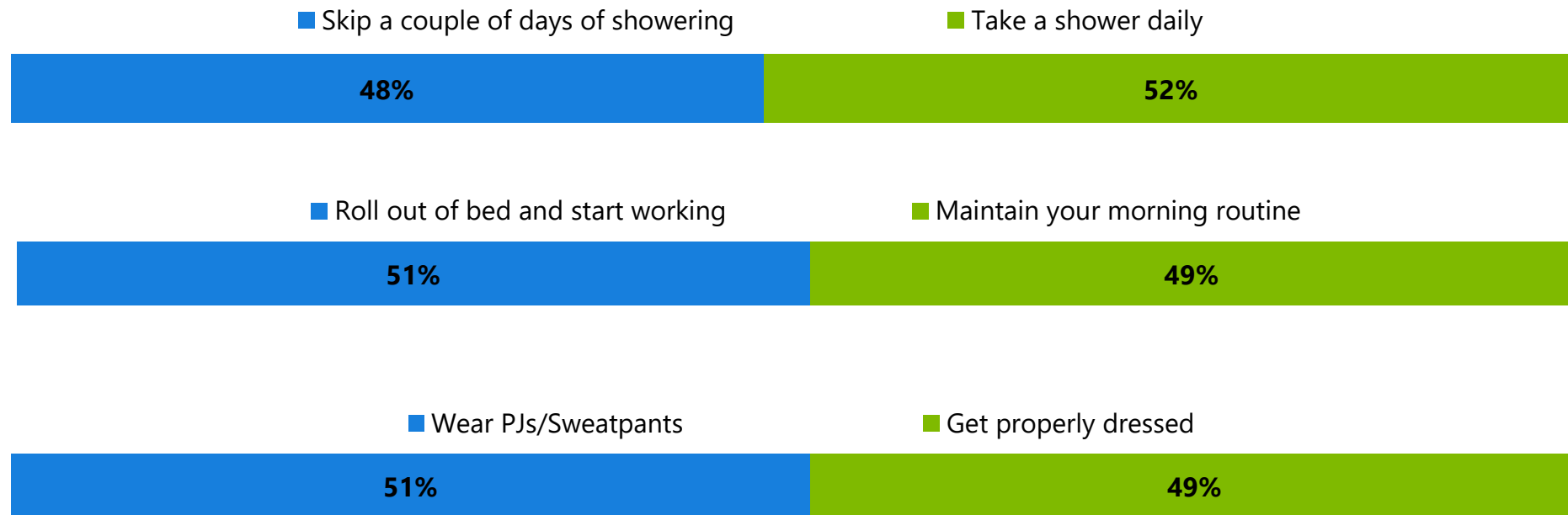
FR04 As a parent, have you experienced any of the following since the stay-home orders have gone into effect? % Yes

BASE: GENERAL PUBLIC W5 (2016); W8 (2029)

MED01 Have you increased or decreased your time spent on the following since the COVID19 outbreak, or has it not changed?

NEARLY HALF OF US ARE SKIPPING DAILY SHOWERS & WORKING IN PJ'S

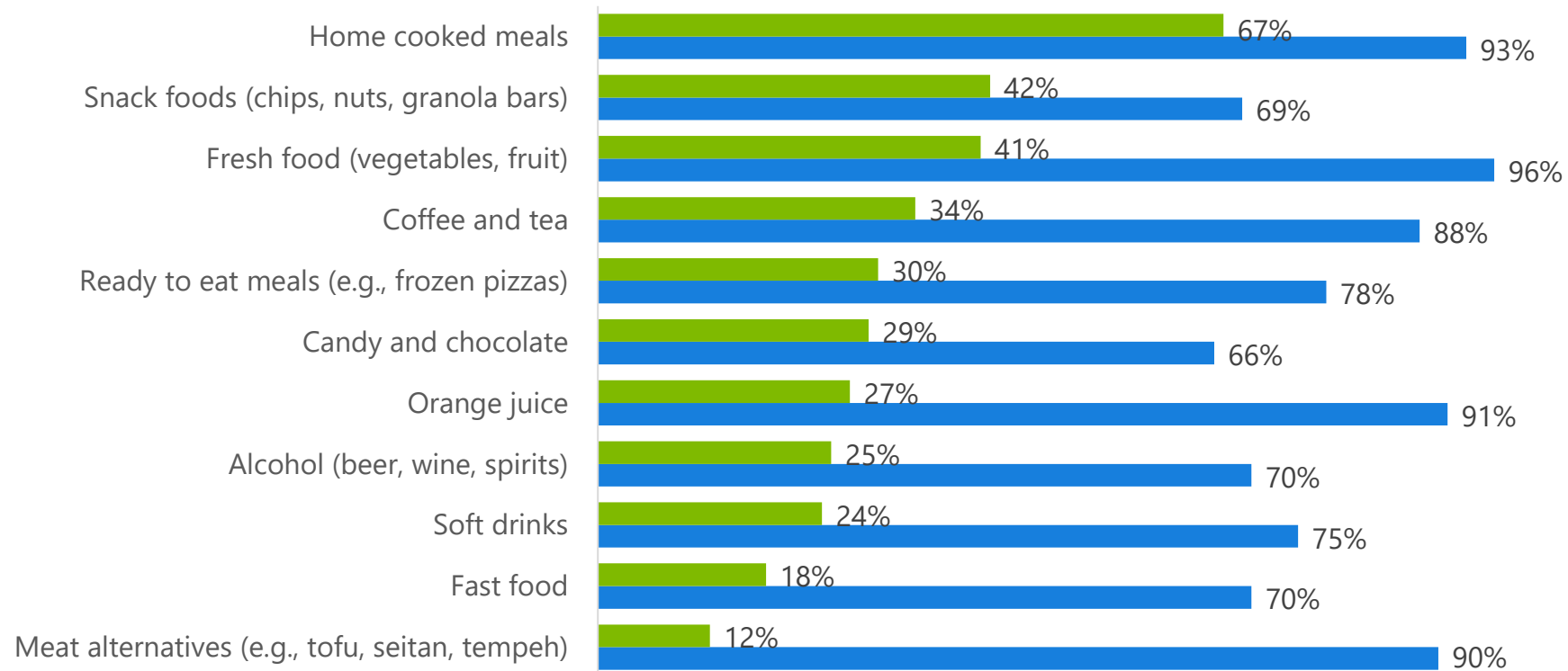
While working from home, are you more likely to...



51% say they are **ACTUALLY WORKING MORE NOW** that they are home than they were in the office

THE SHELTER IN PLACE DIET EQUAL PARTS HEALTH & INDULGENCE

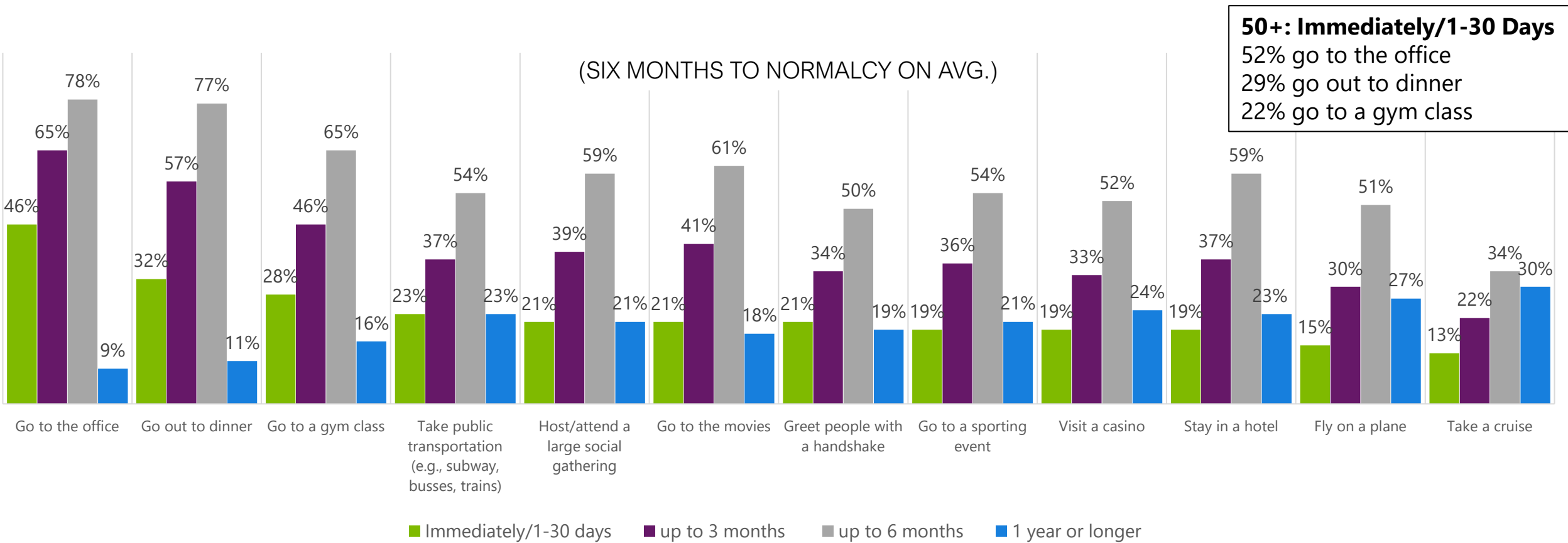
Since the coronavirus outbreak are you consuming more or less of the following?



Already Consuming More
Plan to Maintain or Increase

CONSUMER CONFIDENCE CORRELATES WITH DISTANCE & 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?

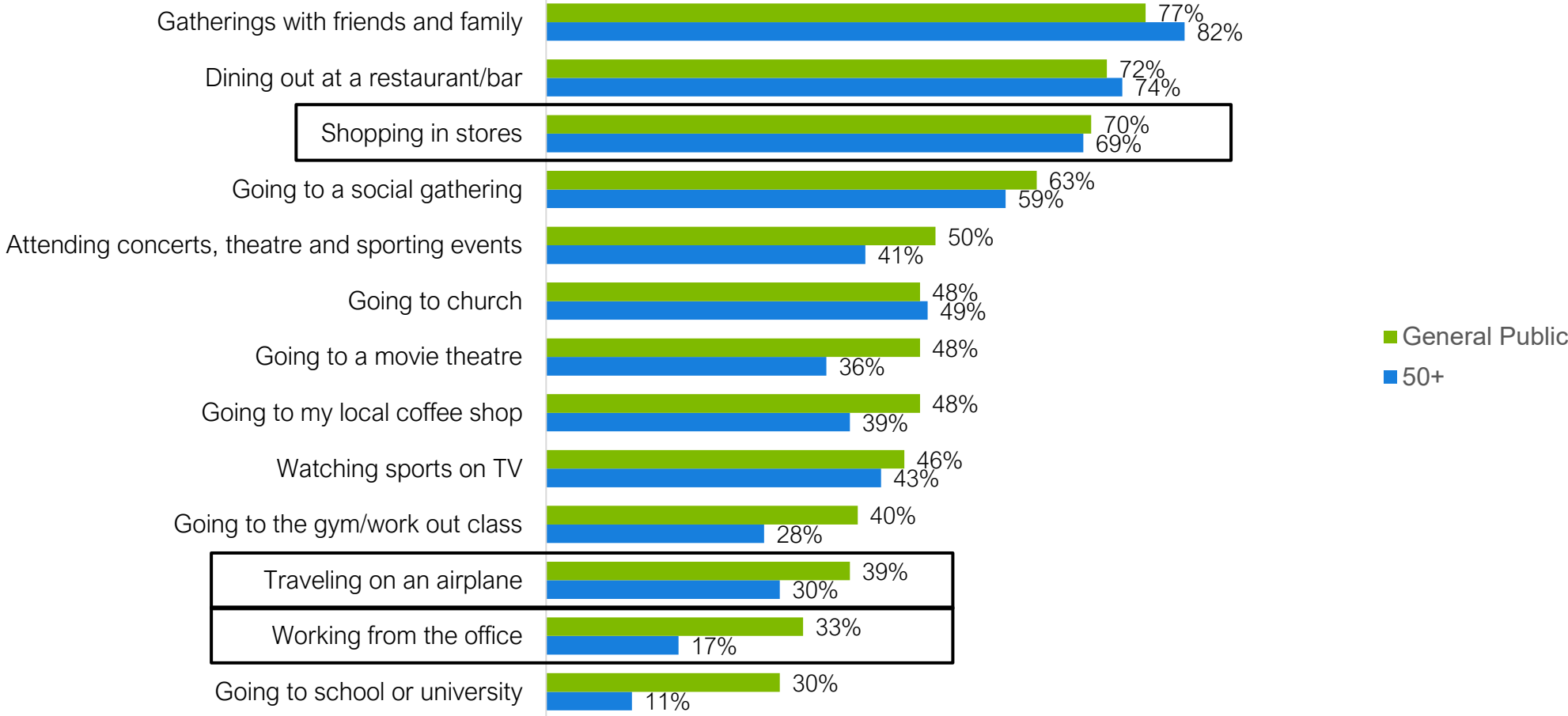


Source: Harris Poll COVID19 Tracker Wave 11
 BASE: GENERAL PUBLIC & APPLICABLE RESPONSE W11 (VARIES)
 Q33B Once the government provides information that the spread of the virus is flattening how long will it take you to do each of the following?

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

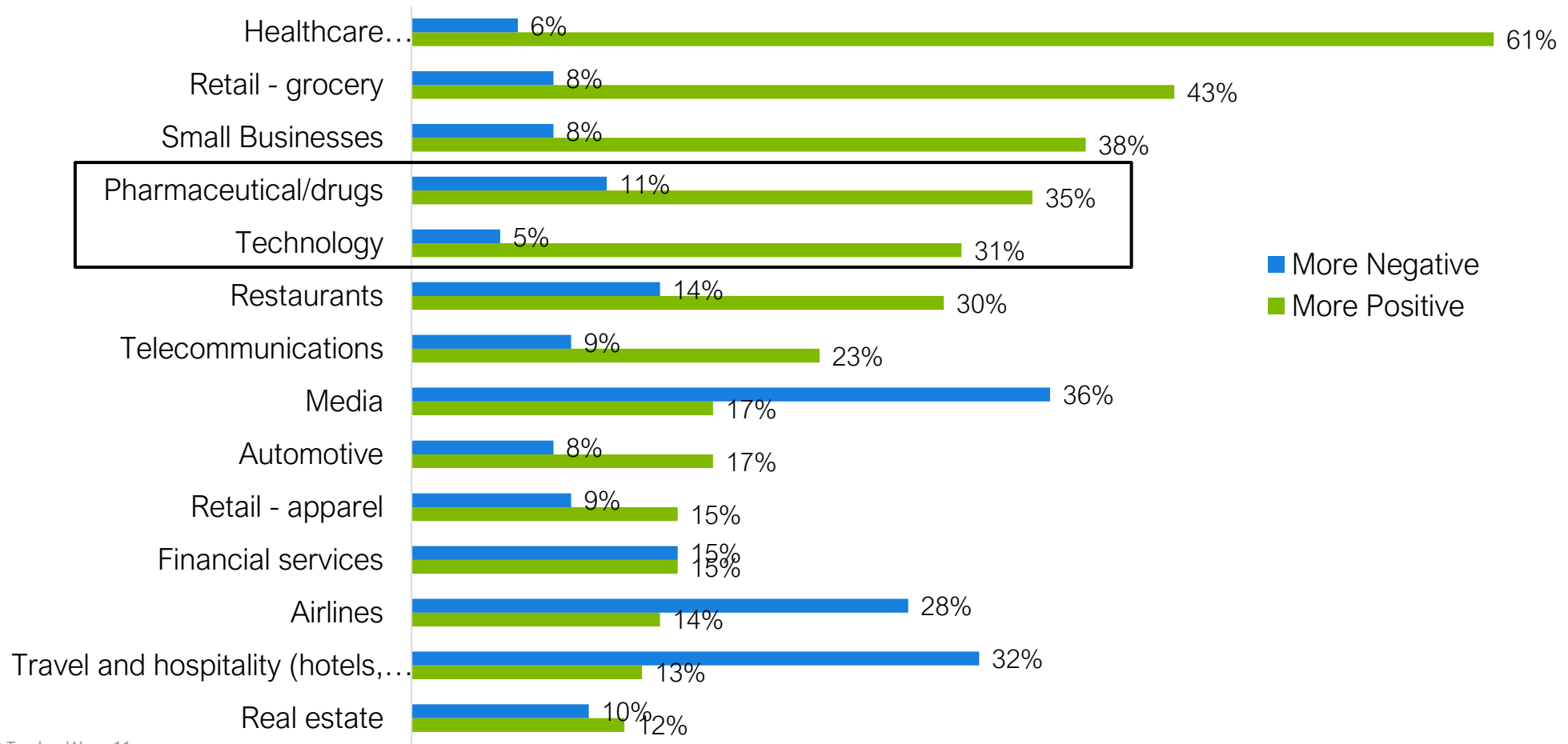


■ General Public
■ 50+

Source: Harris Poll COVID19 Tracker Wave 11
 BASE: GENERAL PUBLIC W11 (2030); 50+ (883)
 FR05 How much would you say you miss each of the following during this time of virus-related shutdowns?

THERE HAS BEEN A RESURGENCE IN POSITIVE INDUSTRY IMPRESSIONS SINCE COVID19 AMONG 50 + AMERICANS

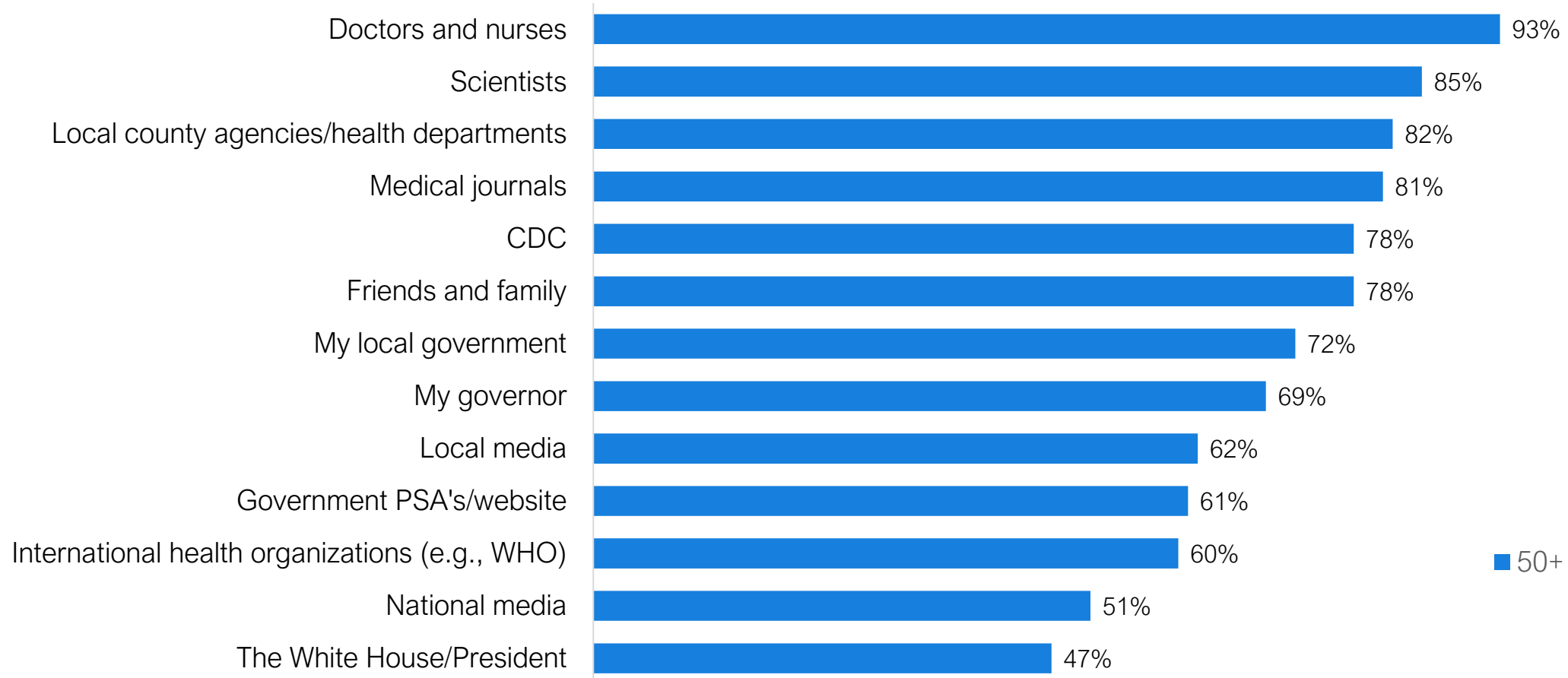
How has your view of each of the following industries changed since the start of the coronavirus pandemic? (Among 50+)



Source: Harris Poll COVID19 Tracker Wave 11
 BASE: GENERAL PUBLIC W11 (2030) ; 50+ (883)
 Q38 How has your view of each of the following industries changed since the start of the coronavirus pandemic?

AND THERE IS A RENEWAL OF TRUST IN INSTITUTIONS AMID THE PANDEMIC AMONG 50+ AMERICANS

How trustworthy do you think each of the following sources are to provide accurate information regarding the coronavirus outbreak? Summary of Very + Somewhat trustworthy



Source: Harris Poll COVID19 Tracker Wave 11

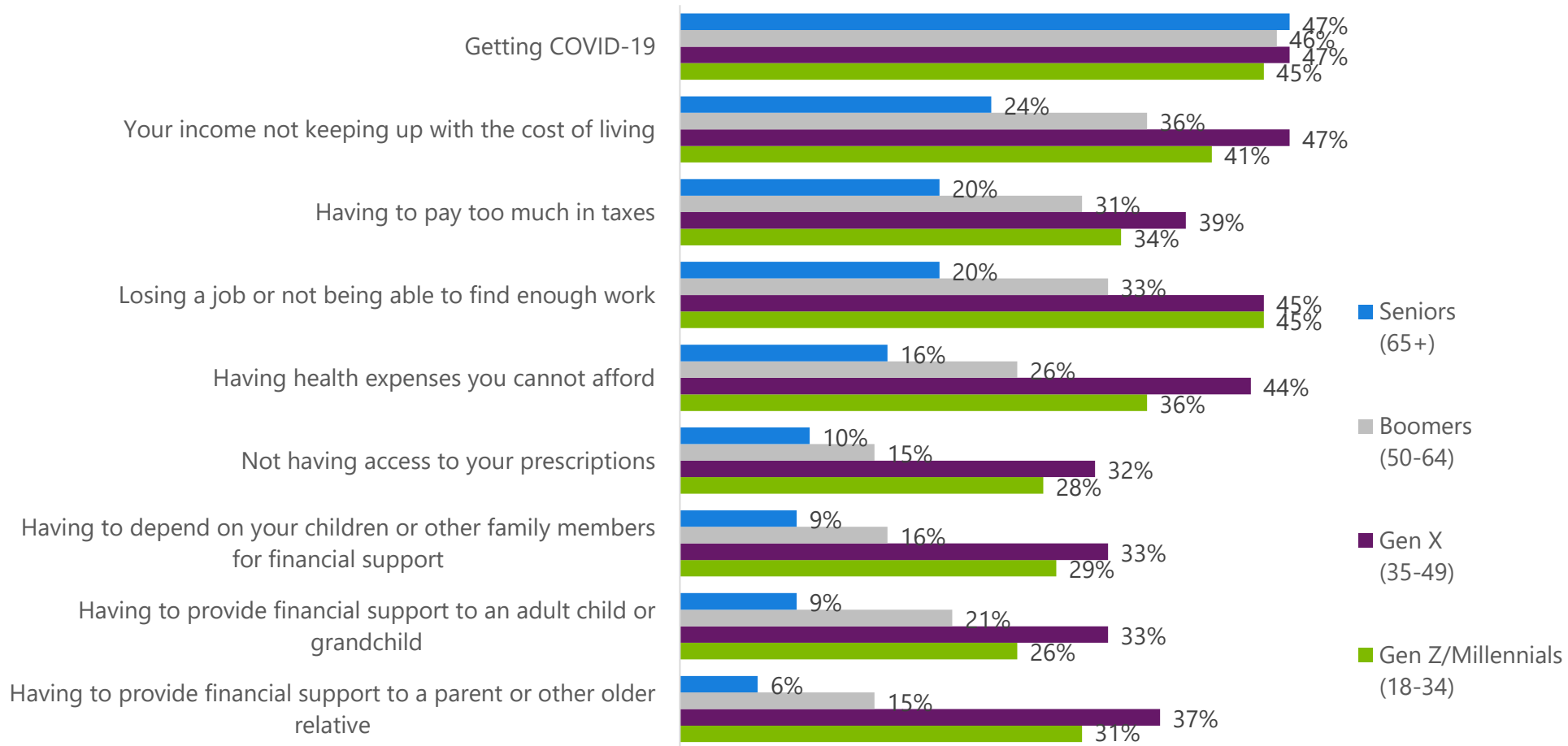
BASE: 50+ (883)

Q24. How trustworthy do you think each of the following sources are to provide accurate information regarding the coronavirus outbreak?

50+ ARE MORE WORRIED ABOUT GETTING COVID19 & LOSING INCOME THAN THEY ARE CONCERNED ABOUT HEALTHCARE ACCESS & AFFORDABILITY

Since the COVID-19 pandemic how often do you personally worry about each of the following?

% Often Worry

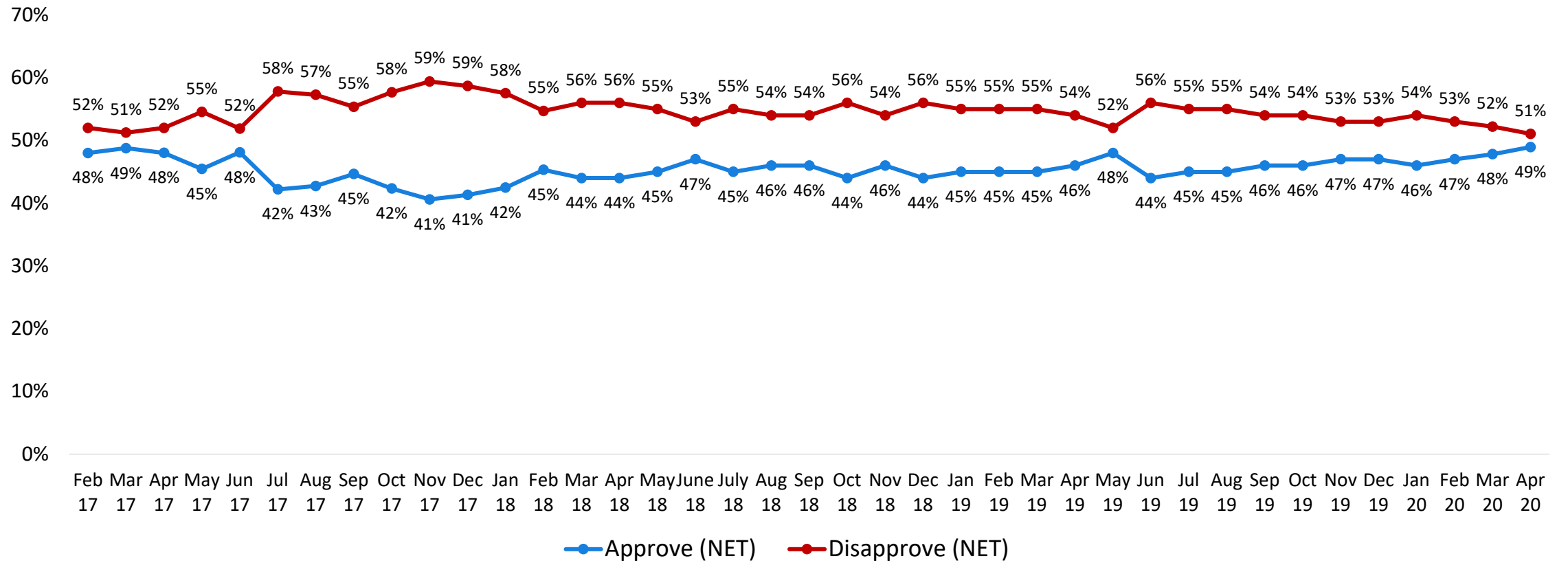


50+
30% often worry about income not keeping up with cost of living

Source: Harris Poll COVID19 Tracker Wave 11
 BASE: GENERAL PUBLIC W11 (2030)
 NUR05 Since the COVID-19 pandemic how often do you personally worry about each of the following?

TRUMP APPROVAL CONTINUES TO INCREASE, NOW AT 49 PERCENT

President Trump Overall Approval

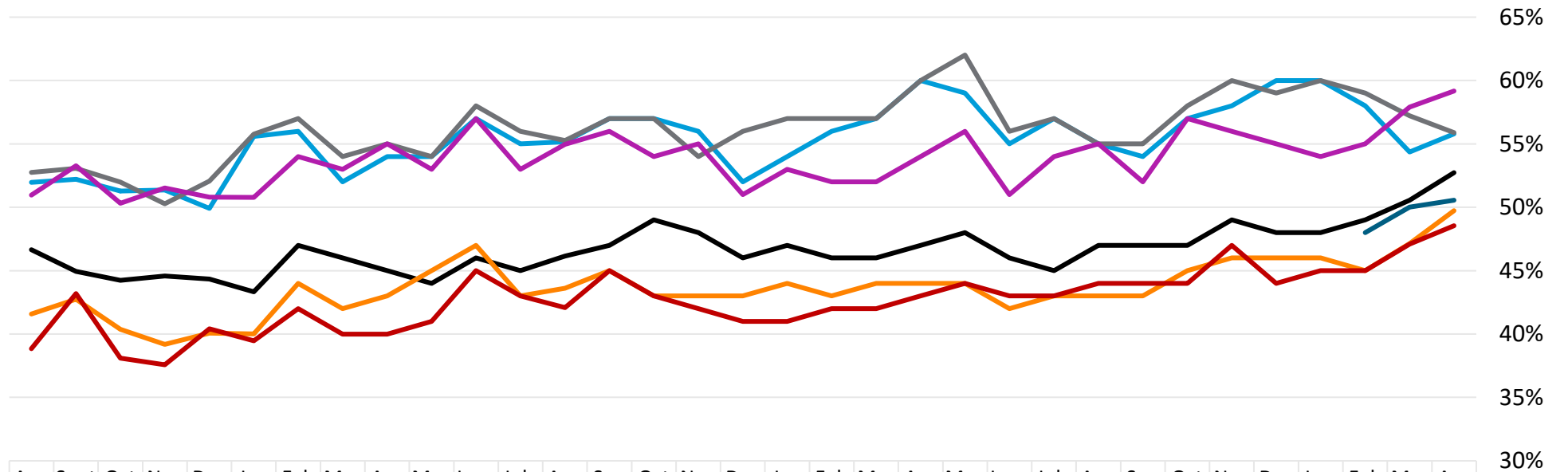


BASE: Registered Voters (n=2394)

M3 Do you approve or disapprove of the job Donald Trump is doing as President of the United States?

HALF OF VOTERS CREDIT TRUMP ON HANDLING THE CORONAVIRUS CRISIS; HIS HANDLING OF THE ECONOMY & STIMULATING JOBS CONTINUES TO RECEIVE MAJORITY APPROVAL

Approve Trump on... (Strongly or Somewhat Approve)



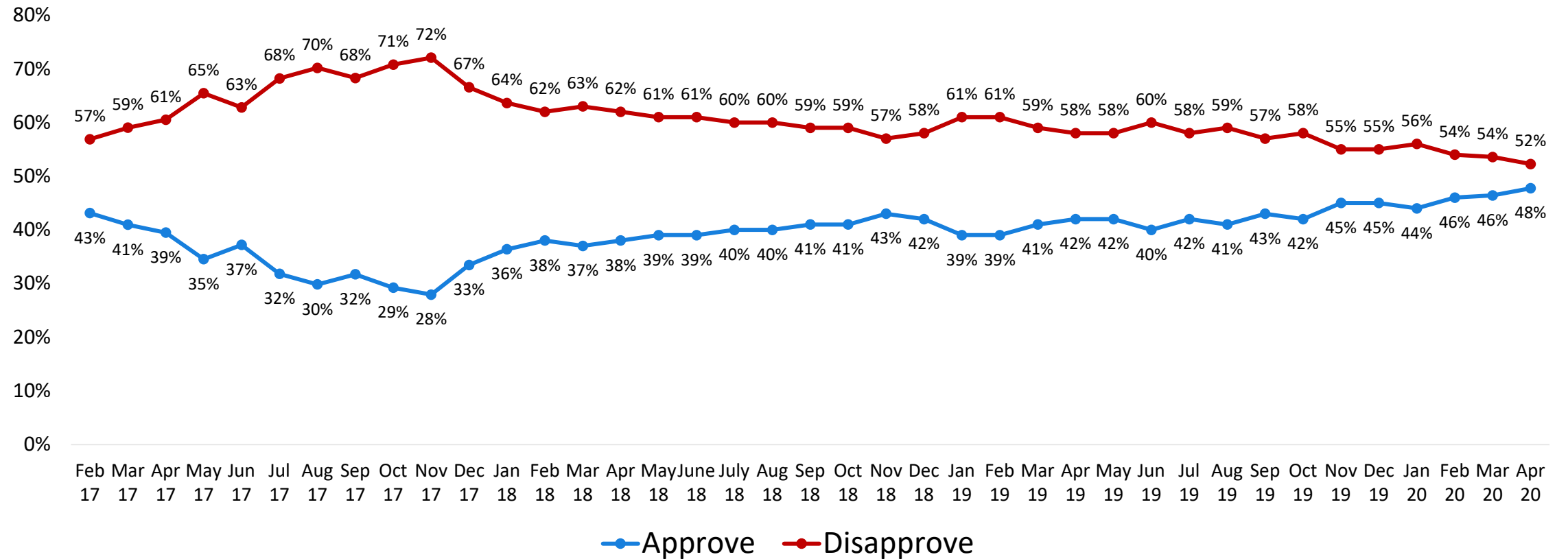
	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
— The Economy	52%	52%	51%	51%	50%	56%	56%	52%	54%	54%	57%	55%	55%	57%	57%	56%	52%	54%	56%	57%	60%	59%	55%	57%	55%	54%	57%	58%	60%	60%	58%	54%	56%
— Stimulating Jobs	53%	53%	52%	50%	52%	56%	57%	54%	55%	54%	58%	56%	55%	57%	57%	54%	56%	57%	57%	57%	60%	62%	56%	57%	55%	55%	58%	60%	59%	60%	59%	57%	56%
— Fighting Terrorism	51%	53%	50%	52%	51%	51%	54%	53%	55%	53%	57%	53%	55%	56%	54%	55%	51%	53%	52%	52%	54%	56%	51%	54%	55%	52%	57%	56%	55%	54%	55%	58%	59%
— Immigration	47%	45%	44%	45%	44%	43%	47%	46%	45%	44%	46%	45%	46%	47%	49%	48%	46%	47%	46%	46%	47%	48%	46%	45%	47%	47%	47%	49%	48%	48%	49%	51%	53%
— Foreign Affairs	42%	43%	40%	39%	40%	40%	44%	42%	43%	45%	47%	43%	44%	45%	43%	43%	43%	44%	43%	44%	44%	44%	42%	43%	43%	43%	45%	46%	46%	46%	45%	47%	50%
— Administering the Gov't	39%	43%	38%	38%	40%	39%	42%	40%	40%	41%	45%	43%	42%	45%	43%	42%	41%	41%	42%	42%	43%	44%	43%	43%	44%	44%	44%	47%	44%	45%	45%	47%	49%
— Reacting to Coronavirus																															48%	50%	51%

BASE: Registered Voters (n=2394)

M3A Do you approve or disapprove of the job President Trump is doing on ...?

GOP APPROVAL IS NOW IN THE HIGH FORTIES

GOP Approval

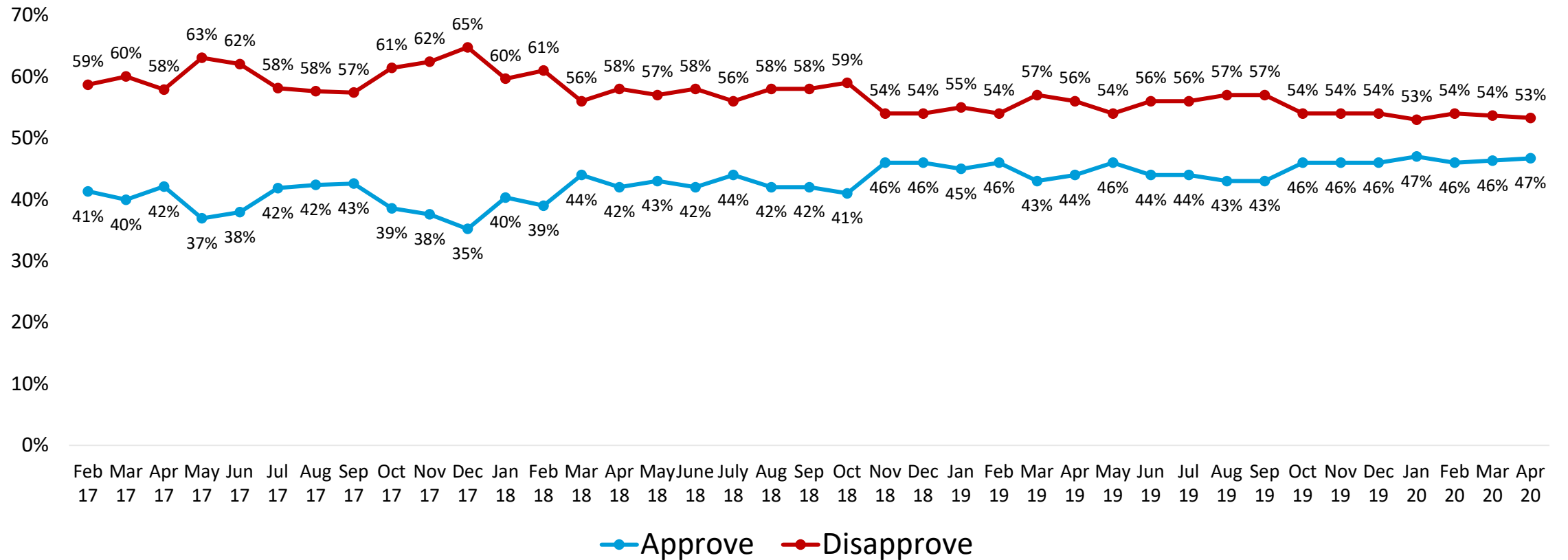


BASE: Registered Voters (n=2394)

M4 Do you approve or disapprove of the way the Republican Party is handling its job?

AS IS APPROVAL FOR DEMOCRATIC PARTY

Democratic Party Approval

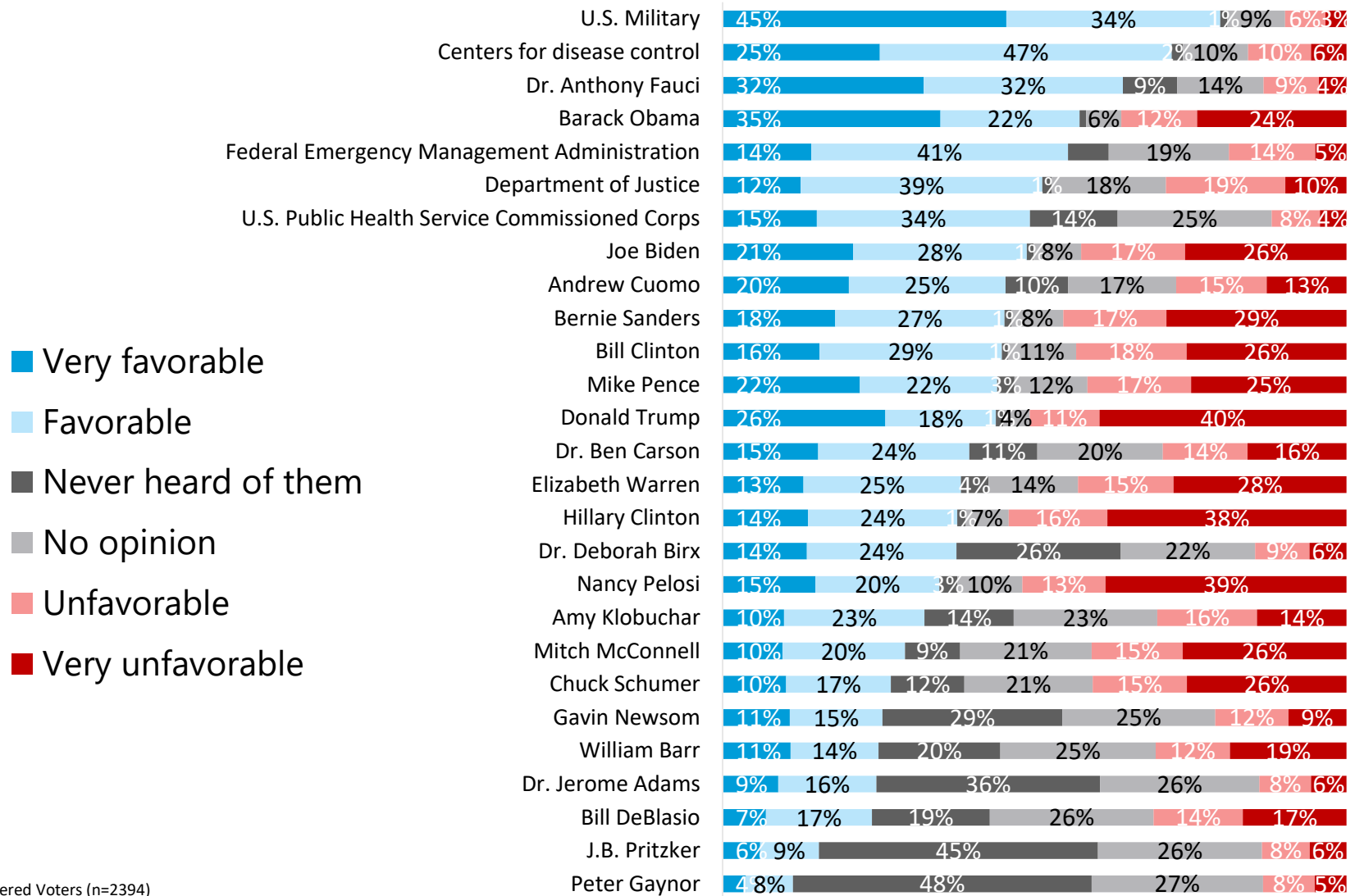


BASE: Registered Voters (n=2394)

M5 Do you approve or disapprove of the way the Democratic Party is handling its job?

STATE INSTITUTIONS & MEDICAL REPRESENTATIVES ARE SEEN VERY FAVORABLY

Favorability of Political Figures and Groups



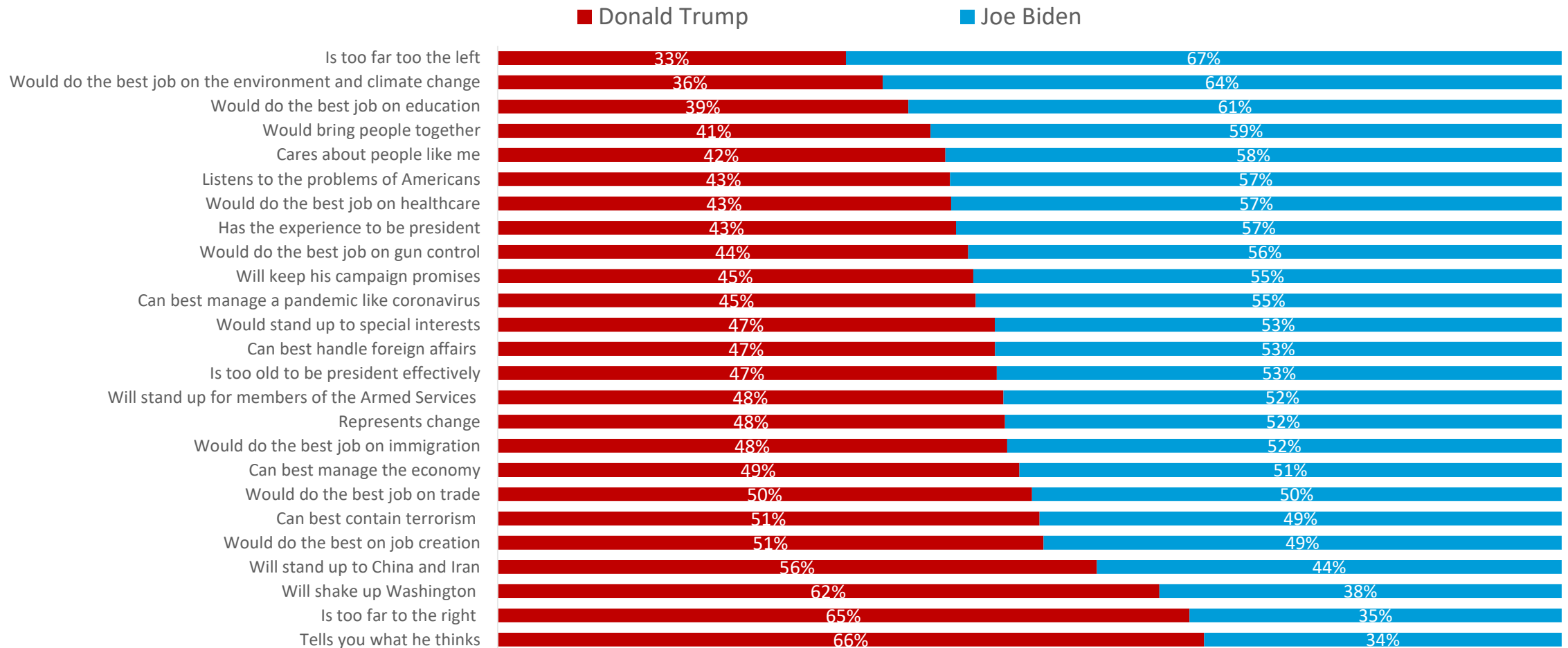
	Favorable	Unfavorable
U.S. Military	80%	10%
Centers for disease control	72%	16%
Dr. Anthony Fauci	64%	13%
Barack Obama	57%	36%
FEMA	55%	19%
Department of Justice	51%	29%
USPHSCC	49%	12%
Joe Biden	49%	43%
Andrew Cuomo	45%	27%
Bernie Sanders	45%	45%
Bill Clinton	45%	43%
Mike Pence	44%	42%
Donald Trump	44%	51%
Dr. Ben Carson	40%	29%
Elizabeth Warren	38%	43%
Hillary Clinton	38%	54%
Dr. Deborah Birx	37%	15%
Nancy Pelosi	35%	52%
Amy Klobuchar	32%	30%
Mitch McConnell	29%	41%
Chuck Schumer	27%	41%
Gavin Newsom	26%	21%
William Barr	25%	31%
Dr. Jerome Adams	25%	14%
Bill DeBlasio	24%	31%
J.B. Pritzker	15%	14%

BASE: Registered Voters (n=2394)

F1 Now we will show you some names. Please indicate if you have a favorable or unfavorable view of that person - or if you've never heard of them.

BIDEN BEATS TRUMP ON A VARIETY OF ISSUES, WHILE TRUMP WINS ON STANDING UP TO CHINA & IRAN AND SHAKING UP WASHINGTON

Does this apply more to . . .

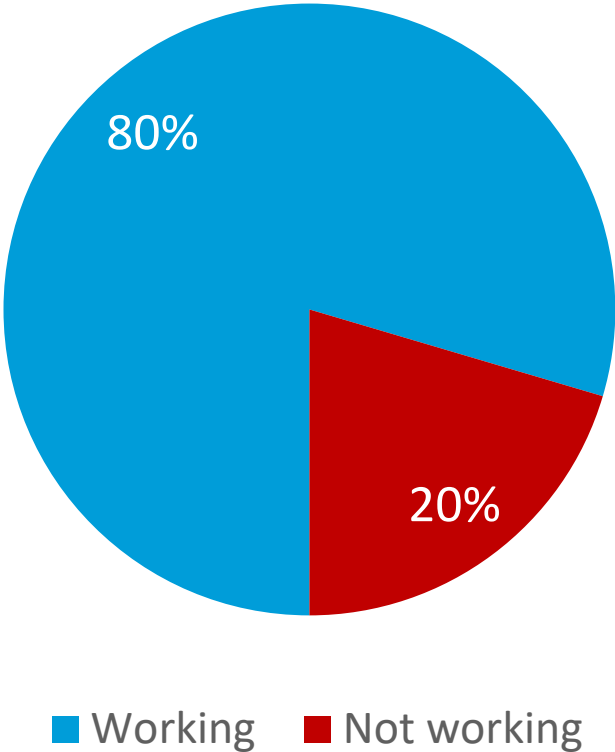


BASE: Registered Voters; Split Sample (n=1322-1359)

HORSE3B: Now I will read you some words or phrases and ask you to select who they apply to most. Does this apply more to . . .

8 IN 10 VOTERS BELIEVE THAT SOCIAL DISTANCING MEASURES HAVE BEEN WORKING

Do you think mitigation efforts such as the 45 days of social distancing ordered by the White House coronavirus taskforce are working or not working?

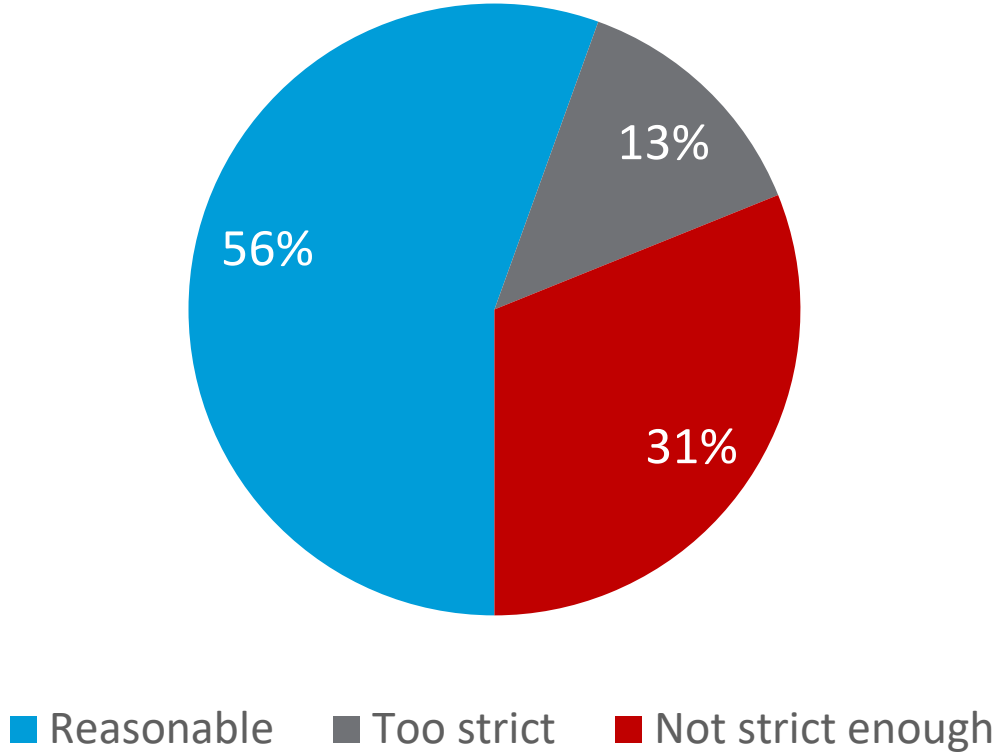


BASE: Registered Voters (n=2394)

COV042002: Do you think mitigation efforts such as the 45 days of social distancing ordered by the White House coronavirus taskforce are working or not working?

OVER HALF OF VOTERS BELIEVE THE MEASURES THAT HAVE BEEN TAKEN TO CONTROL THE VIRUS ARE REASONABLE, WITH ANOTHER 3 IN 10 WANTING STRICTER MEASURES

Do you think that the measures taken to control the virus so far have been reasonable, too strict or not strict enough?



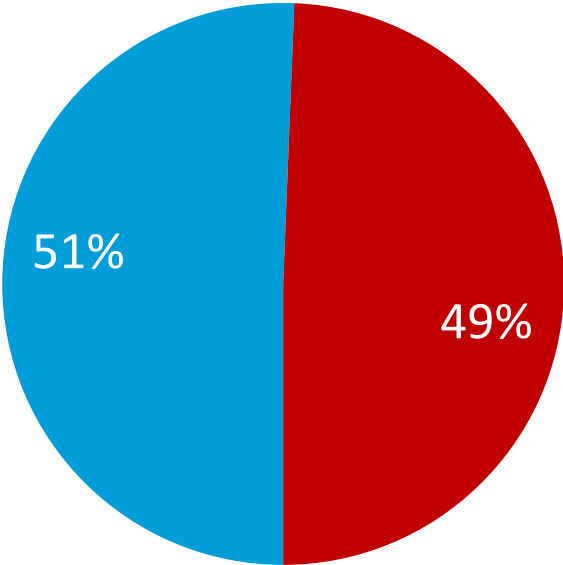
BASE: Registered Voters (n=2394)

COV032003: Do you think that the measures taken to control the virus so far have been reasonable, too strict or not strict enough?

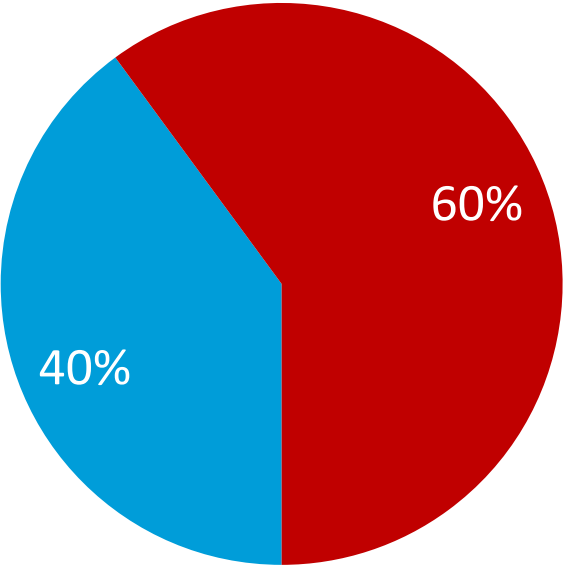
VOTERS ARE SPLIT ON WHETHER THEY BELIEVE PRESIDENT TRUMP HAS BEEN REACHING ACROSS THE AISLE, WHILE A MAJORITY SAY SPEAKER PELOSI'S ACTIONS HAVE BEEN LARGELY PARTISAN

Do you think that President Trump has reached across the aisle to work with Democrats or have his actions been mostly partisan?

Do you think Speaker of the House Nancy Pelosi has been reaching across the aisle to work with Republicans or have her actions been mostly partisan?



- President Trump has been reaching across the aisle
- His actions have been mostly partisan

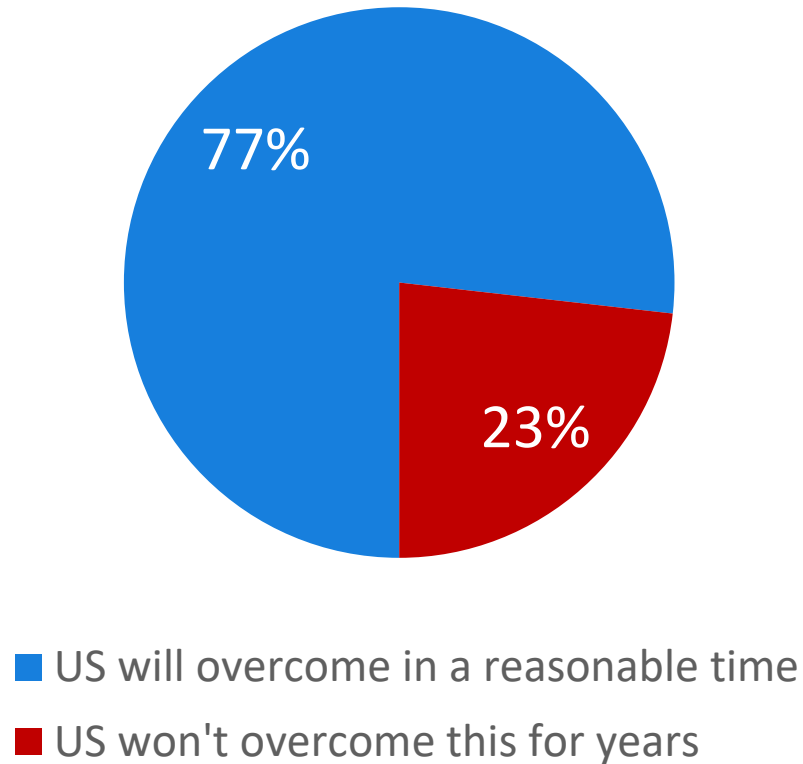


- Speaker Pelosi has been reaching across the aisle
- Her actions have been mostly partisan

BASE: Registered Voters (n=2394)
COV032012: Do you think that President Trump has reached across the aisle to work with Democrats or have his actions been mostly partisan?
COV032013: Do you think Speaker of the House Nancy Pelosi has been reaching across the aisle to work with Republicans or have her actions been mostly partisan?

VOTERS ARE OPTIMISTIC THE U.S. WILL OVERCOME THE CRISIS IN A REASONABLE AMOUNT OF TIME, WITH OVER HALF BELIEVING IT WILL TAKE 6-12 MONTHS TO RETURN TO NORMAL

Are you optimistic that the United States will overcome the coronavirus crisis in a reasonable time or pessimistic that the US won't overcome this for years?



How long will it take before things return to the way they were before coronavirus started to spread?



BASE: Registered Voters (n=2394)

COV032017: Are you optimistic that the United States will overcome the coronavirus crisis in a reasonable time or pessimistic that the US won't overcome this for years?

COV0320218: How long will it take before things return to the way they were before coronavirus started to spread?

THANK YOU



STAGWELL
←
PATENTED TO THOMAS STAGWELL 1649
ACQUIRED BY RICHARD BENNETT 1705,
ONE OF THE LARGEST LAND OWNERS IN
MARYLAND. HIS DESCENDANT JUDGE
RICHARD BENNETT CARMICHAEL BUILT
THE HOUSE ABOUT 1805. HE PRESIDED
OVER THE CONVENTION OF 1867, FOR
A NEW CONSTITUTION FOR THE STATE
OF MARYLAND.
STATE BOARD OF HISTORICAL MARKERS

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