

2020 CMO Global Growth Summit Crisis, Change and Consumerism: Outlook 2021

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# The Harris Poll

Listening to the world's most urgent social and economic priorities We asked We asked 30,000 people in 27 countries, what needs, if met, would have the greatest impact in your life?

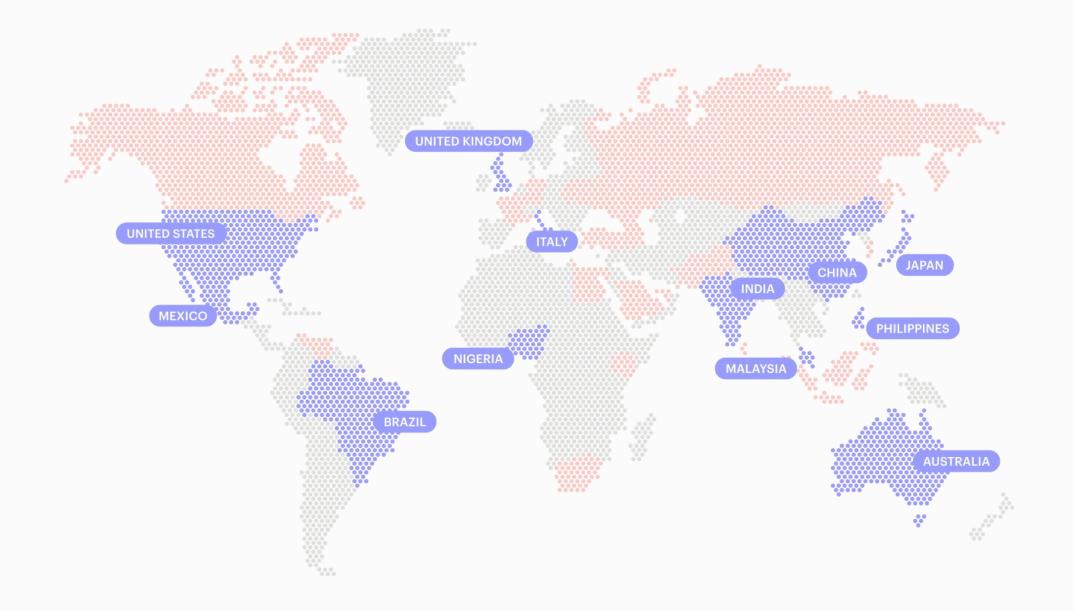
### 10,000 people in 27 countries

#### February 2020



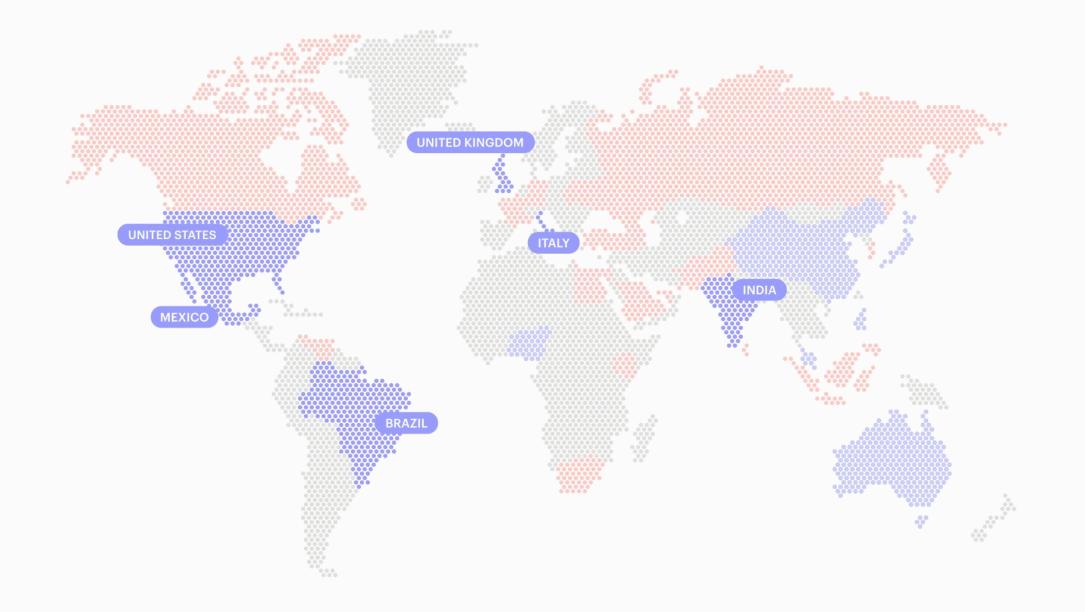
#### 20,000 people in 12 countries

#### September 2020



#### **Extra focus on 6 countries**

#### September 2020



### 48 personal needs surveyed

#### **Corruption and transparency**

- · Equal access to justice, safe/fair trials, & due process
- Government corruption, transparency, & accountability
- Data security and privacy
- · Safe and legitimate elections
- Political and social freedoms
- Diversity across leadership and business

#### Financial vulnerability

#### Systemic injustice and inequality

Climate change and environmental

degradation

- · Job access and unemployment
- Income inequality
- Access to financial services
- Workforce development for industry automation
- · Violence against girls and women
- Sexual harassment and domestic violence
- Hate crimes based on race, religion, gender, nationality
- Racial/ethnicity equality
- Female reproductive rights
- Gender pay gap
- Female political participation
- LGBTQ equality and rights
- Pollution
- Climate change
- Sustainable agriculture
- Extinction of species and biodiversity loss
- Transition to affordable sustainable/ renewable energy
- Land degradation

#### Violent conflicts, war and terrorism

Access to and affordability

Access to and affordability

of healthcare

of education

Violent conflicts, war and terrorism

· Gun violence and neighborhood crime

- Child labor, forced labor & human trafficking
- Drug trafficking
- · Civil conflicts resulting in displacement & refugees
- · Affordability of healthcare & human insurance
- Maternal and child health care
- · Mental health, suicide prevention & drug addiction
- Access to affordable quality education
- · Education for girls
- Access to the internet
- Communicable or infectious disease containment & prevention
- Health innovation
- Non-communicable disease (NCD) prevention & education
- · Access to equality social services
- Access to safe sanitation facilities
- Access to safe and legitimate housing
- Emergency preparedness for natural disasters
- Adequate transportation services
- Urban congestion and overcrowding
- Access to clean drinking water
- Access to basic medical care
- Hunger, food scarcity and malnutrition
- Access to electricity

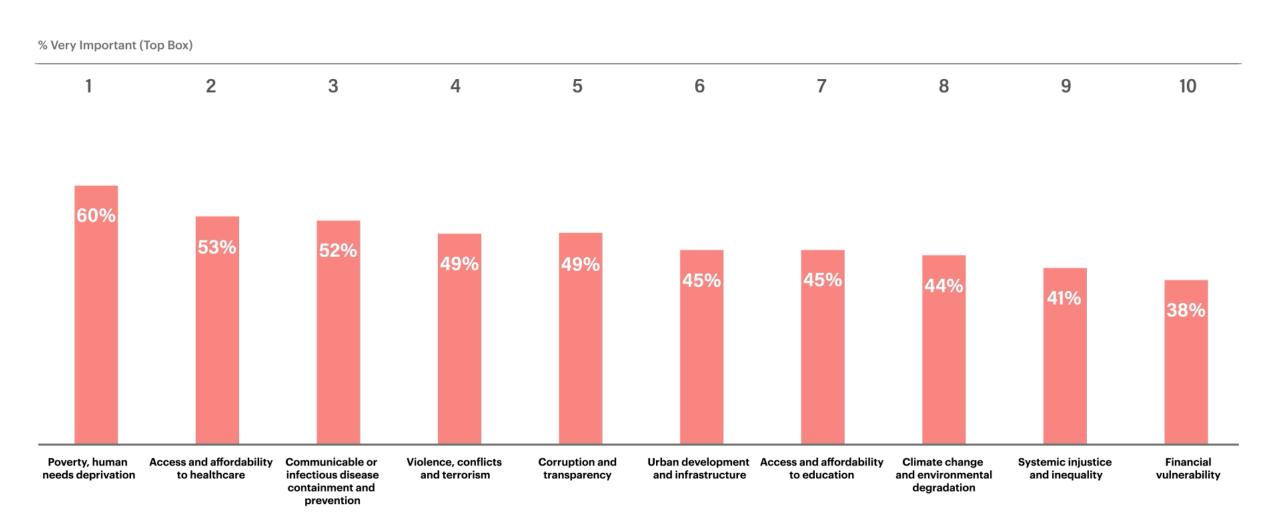
containment and prevention

#### Poverty, human needs deprivation

Communicable or infectious disease

#### Urban development and infrastructure

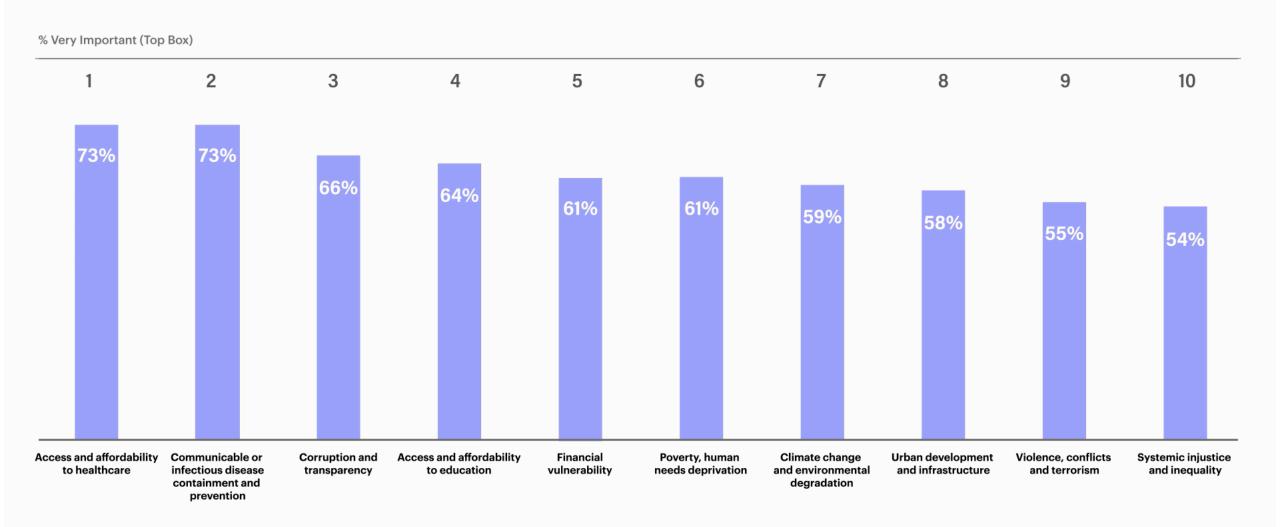
## Poverty, healthcare and disease were most important



February 2020

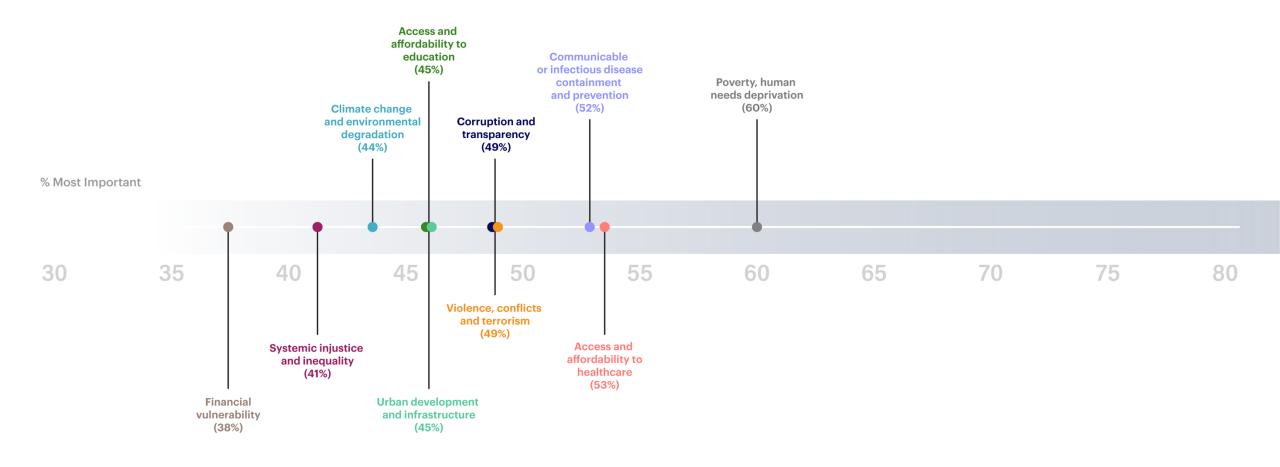
### Healthcare, infectious diseases and transparency rise in importance

#### September 2020



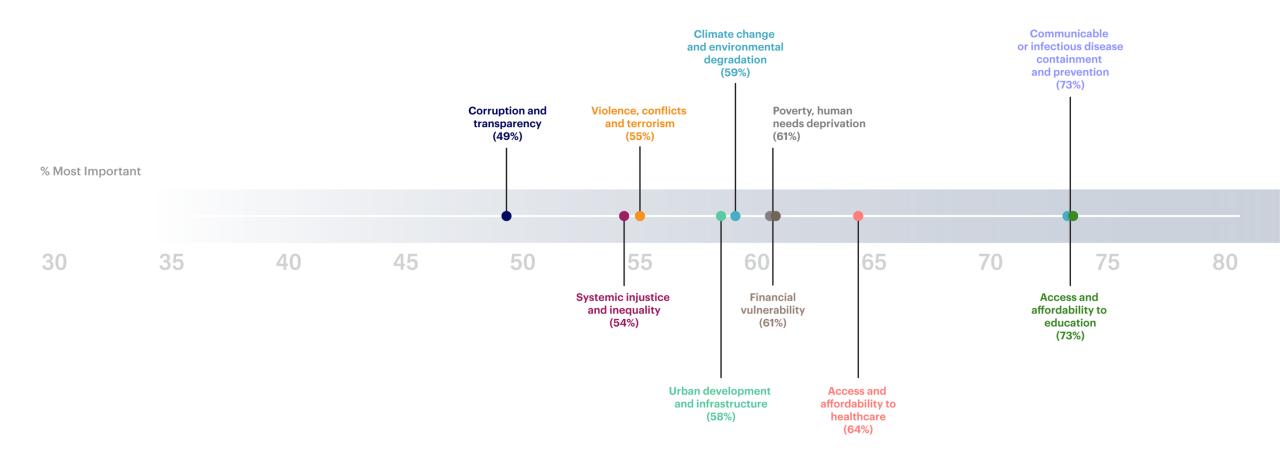
## How COVID19 re-ordered people's socioeconomic priorities

#### February 2020



## How COVID19 re-ordered people's socioeconomic priorities

#### September 2020



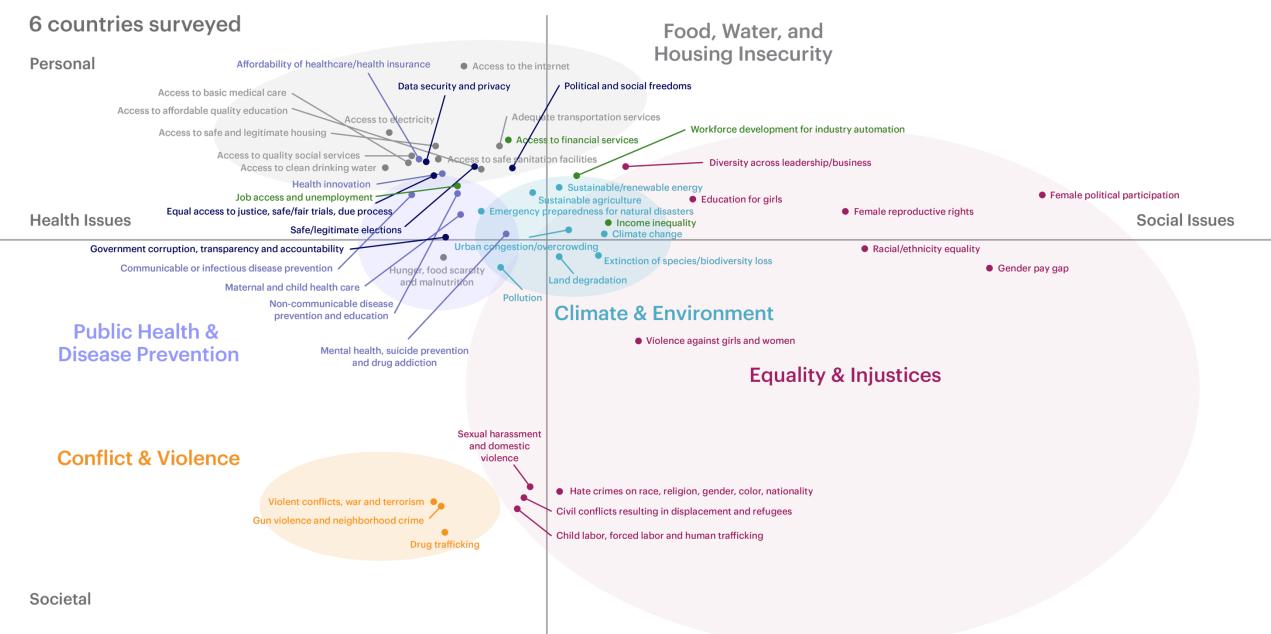
More important since COVID19

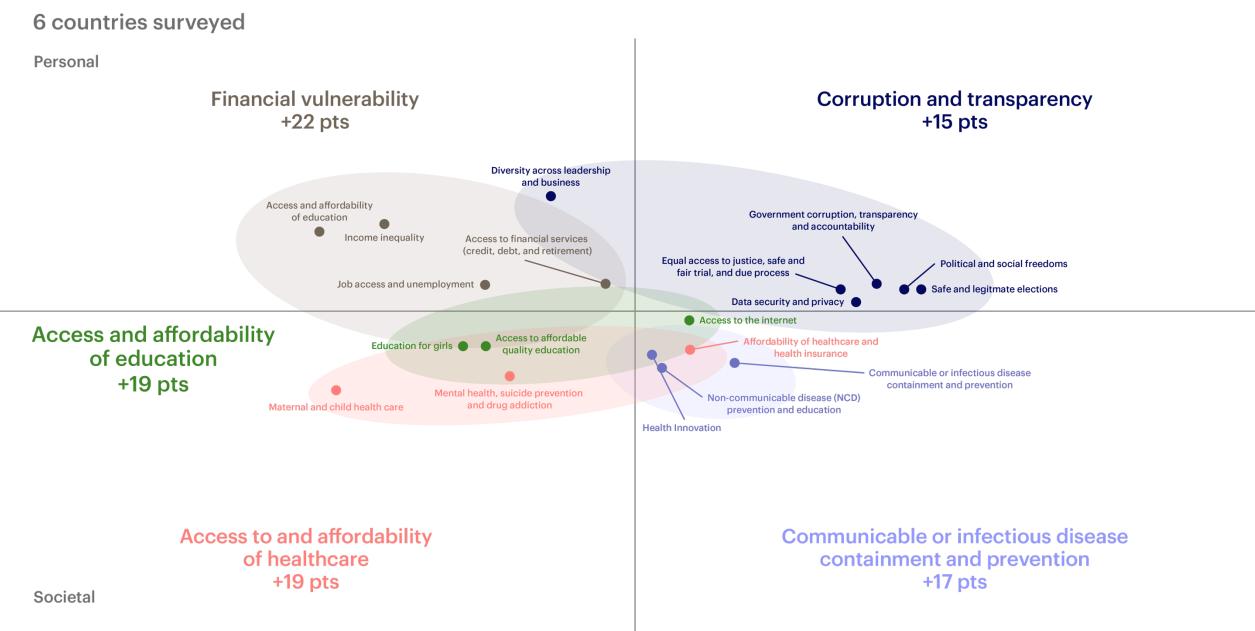
### Examining the top 5 issues among countries hit hardest by COVID-19 September 2020

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Change in % Most Important from February to September	BR	IND	IT	MEX	UK	US
Access and affordability of healthcare	+19%	+27%	+17%	+24%	+15%	+14%
Communicable or infectious disease containment and prevention	+12%	+26%	+17%	+18%	+17%	+13%
Corruption and transparency	+21%	+17%	+22%	+16%	+2%	+13%
Access and affordability to education	+27%	+25%	+20%	+26%	+8%	+11%
Financial vulnerability	+25%	+30%	+20%	+28%	+16%	+16%

### Pre-pandemic, issues were more siloed

### February 2020



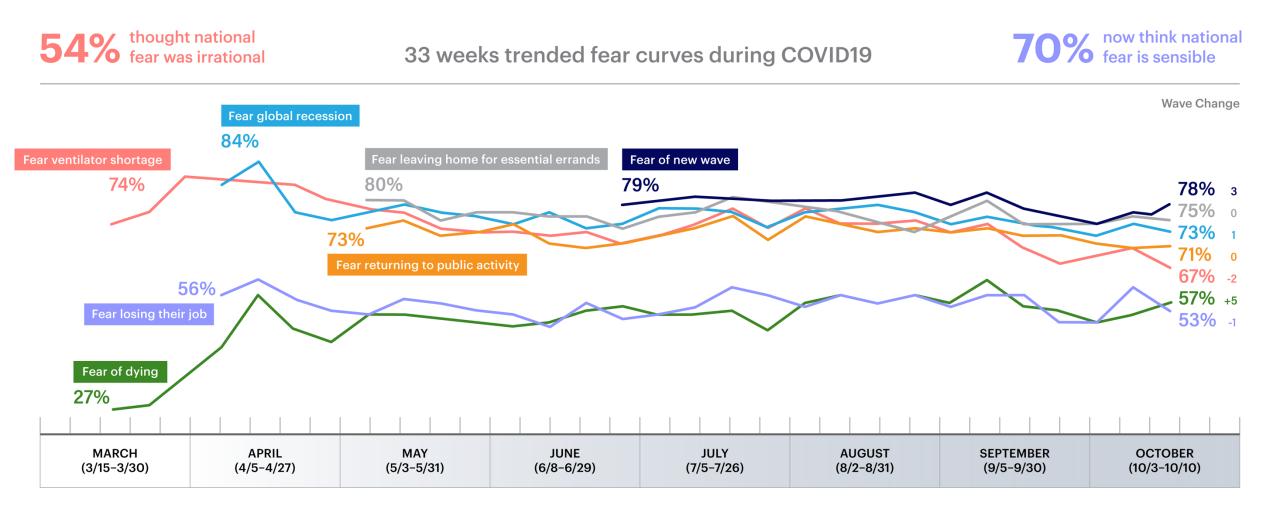


### Today, issues are more interdependent

### September 2020

### America's curtain of fear: Health, the economy and social unrest



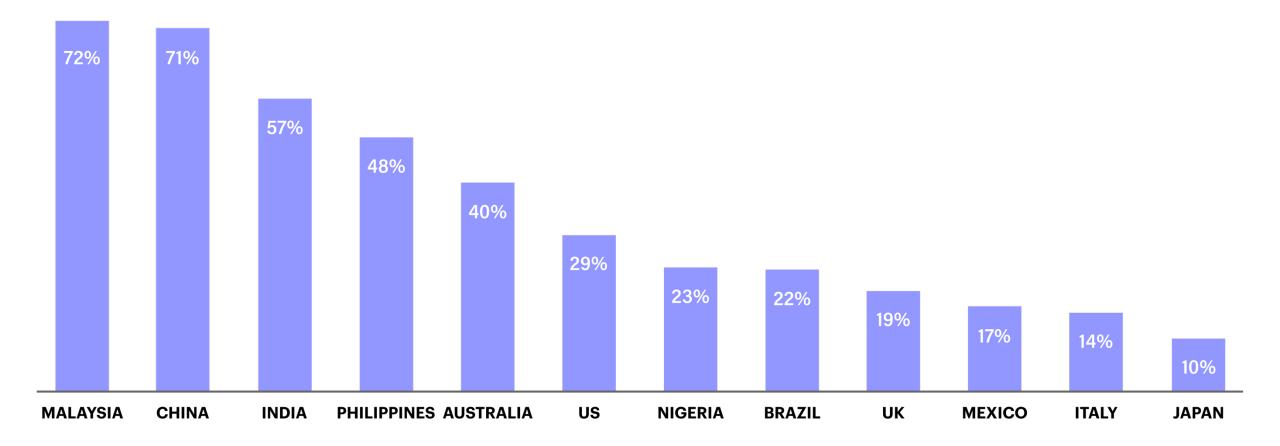


### **COVID's fear around the world September 2020**

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	AUS	BR	СН	IND	IT	JP	MAL	MEX	NG	PHIL	UK	US
Fear of a global recession	91%	88%	77%	85%	86%	91%	90%	85%	82%	90%	87%	80%
Country will be in a recession in 6 months	41%	28%	5%	27%	39%	36%	22%	42%	44%	24%	51%	33%
Fear of losing a job	58%	66%	57%	76%	59%	61%	84%	82%	67%	87%	58%	57%
Changed life in a major way	52%	90%	42%	83%	58%	44%	77%	83%	78%	93%	56%	65%
Lowest point in country history	78%	72%	55%	76%	65%	70%	83%	64%	68%	76%	76%	74%
Fearful and anixous	58%	78%	62%	79%	69%	79%	80%	68%	70%	84%	65%	63%

## There is a leadership crisis around the world September 2020

How much do you support how your country is handling the COVID-19 (coronavirus) pandemic? (%strongly support)

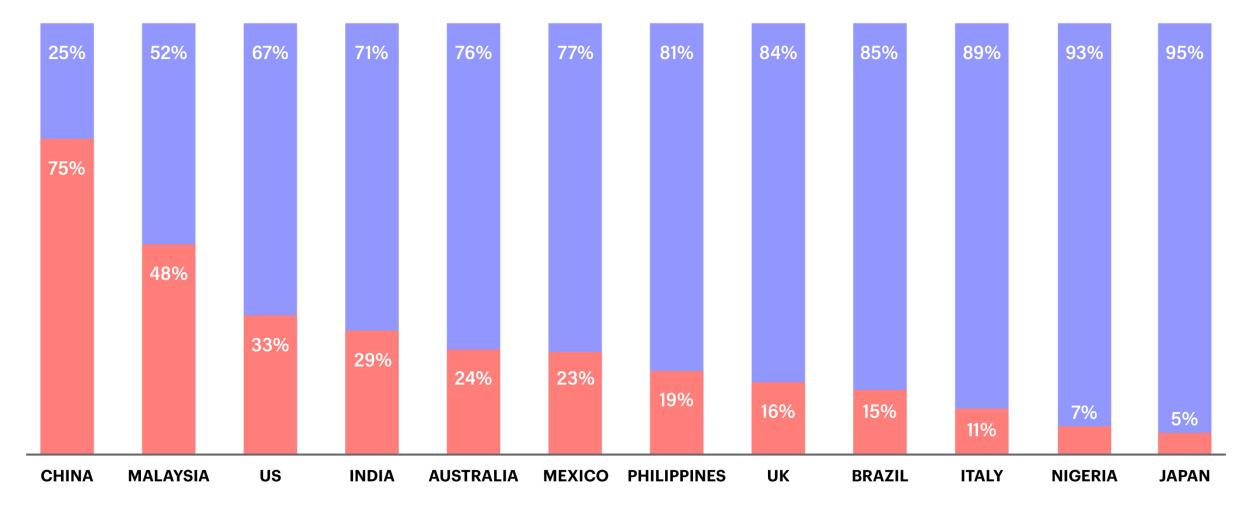


**63%** say their leaders are out of touch with the rest of the country

62% say "the people running the country don't really care what happens to me"

### Strength of countries' economy September 2020

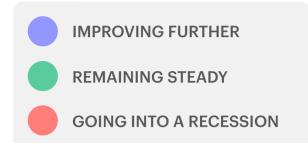
How weak or strong do you think the economy is today in your country?

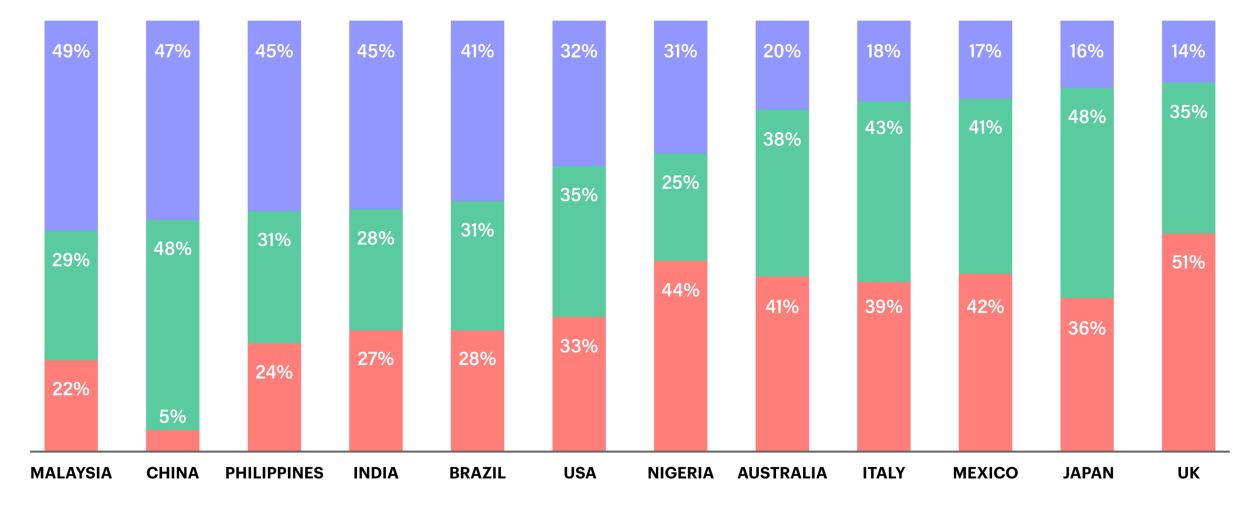


WEAK STRONG

### Economy September 2020

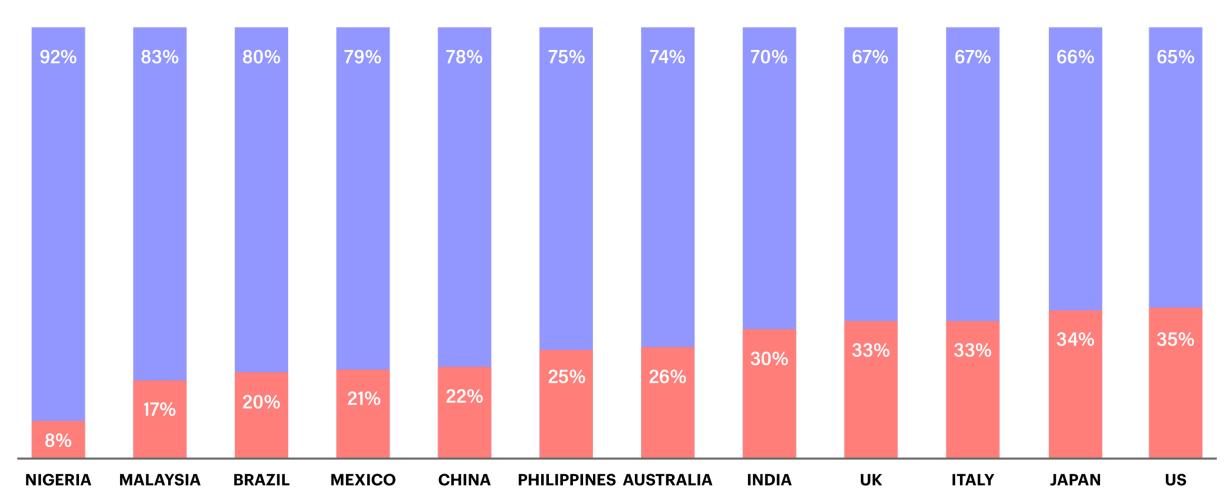
Do you think six months from now the economy in your country will be remaining steady, going into a recession, or improving further?





### Impact of COVID September 2020

Which do you think will have a bigger effect on the life of you and your family?



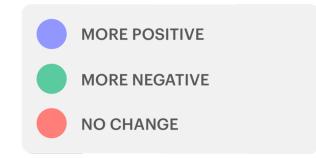
 ECONOMIC IMPACTS OF THE PANDEMIC
COVID-19 (CORONAVIRUS) ITSELF

### **Global corporate reputation rising September 2020**

How has your view of each of the following industries changed since the start of the COVID-19 pandemic?

HEALTHCARE	63% 16% 21	%
PHARMACEUTICAL/DRUGS	55% <mark>13%</mark> 33'	%
TECHNOLOGY	52% <mark>11%</mark> 37 <sup>/</sup>	%
RETAIL/GROCERY	47% 18% 36	%
TELECOMMUNICATIONS	<b>43% 14%</b> 44 <sup>4</sup>	%
FOOD & BEVERAGE	<b>42% 19%</b> 40 <sup>°</sup>	%
SMALL BUSINESS	40% 26% 34	%
MEDIA	<b>38% 25% 37</b> <sup>4</sup>	%
ENERGY AND UTILITIES	35% 20% 44	%
INSURANCE	<b>34% 18%</b> 48 <sup>°</sup>	%

MANUFACTURING	33%	22%
NON-PROFITS	33%	17%
ENTERTAINMENT	32%	28%
FINANCIAL SERVICES	31%	26%
RESTAURANTS	29%	3:
AUTOMOTIVE	24%	21%
OIL	23%	24%
TRAVEL AND HOSPITALITY	23%	4
AIRLINES	21%	39%
REAL ESTATE	20%	26%



44%

50%

40%

44%

39%

54%

52%

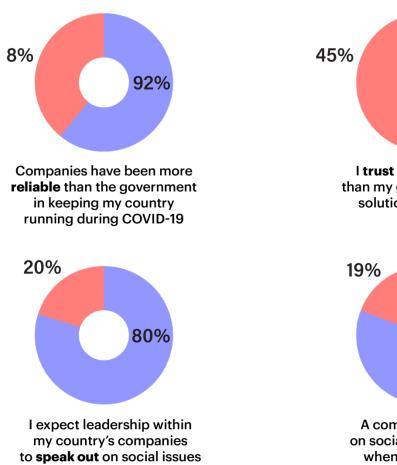
37%

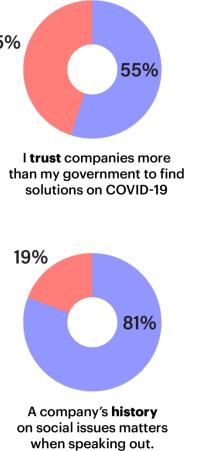
40%

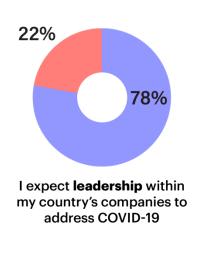
53%

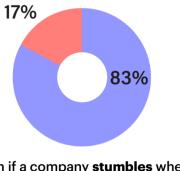
### **Business meets the moment September 2020**

How much do you agree or disagree with the following statements?



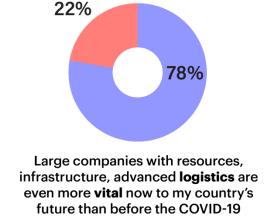


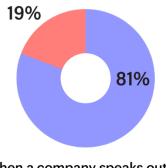




Even if a company **stumbles** when speaking out on social issues, it's important to see how they think and what their intentions are.





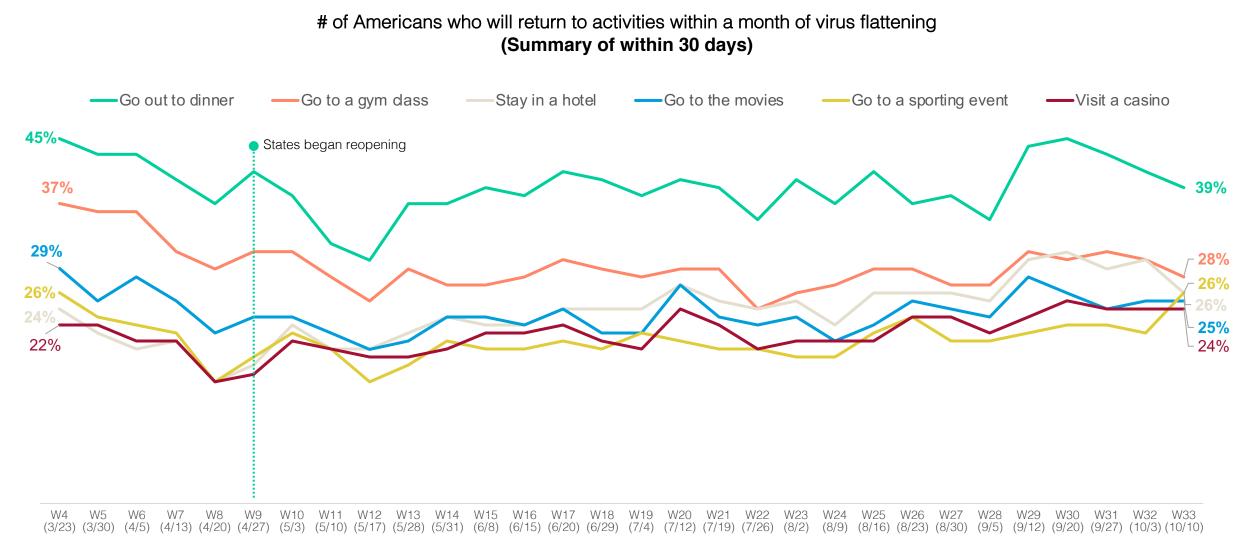


When a company speaks out on social issues it shows they are living up to their internal **values**.

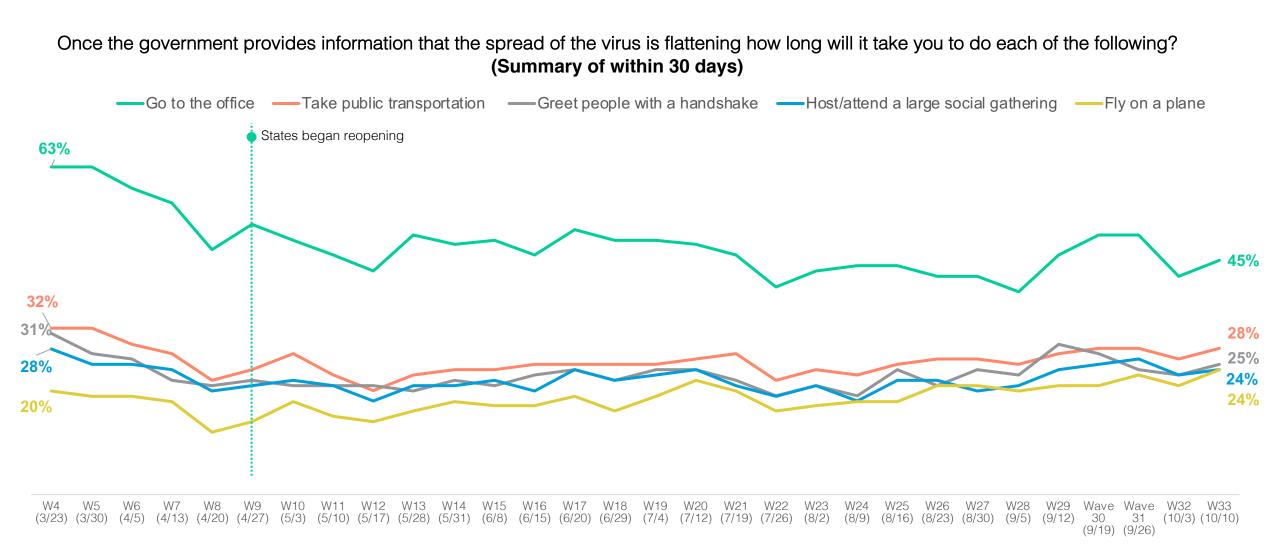


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#### American Life Slower To Return Than Most Expected

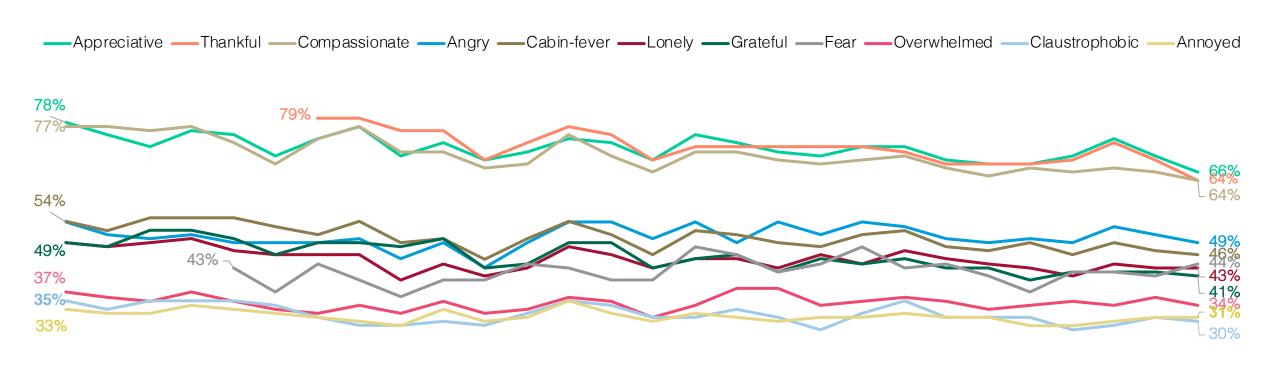


#### Pause in Office Work and Commuting Has Economic Ripple Effects



#### **Beneath Anxiety, Reflection and Gratitude**

Have you felt any of the following during the pandemic?



W29 W33 W6 W7 W22 W23 W25 W26 W27 W30 W31 W32 W8 W9 W10 W11 W12 W13 W14 W15 W16 W17 W18 W19 W20 W21 W24 W28 (4/13) (4/20) (4/27) (5/3) (5/10) (5/17) (5/29) (5/31) (6/8) (6/15) (6/21) (6/29) (7/5) (7/12) (7/19) (7/26) (8/2) (8/9) (8/16) (8/23) (8/30) (9/12) (9/19) (9/26) (10/3) (10/10) (4/5)(9/5)

#### And Longing For Socialization With Friends And Family

-



—Miss social gatherings

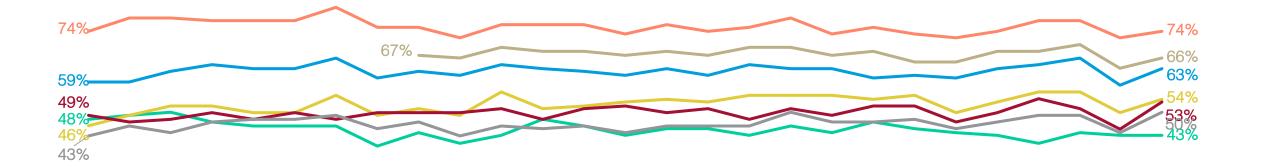
—Miss going to coffee shops

-Miss gathering with friends/family

—Miss attending concerts and sports

-----Miss in-person celebrations

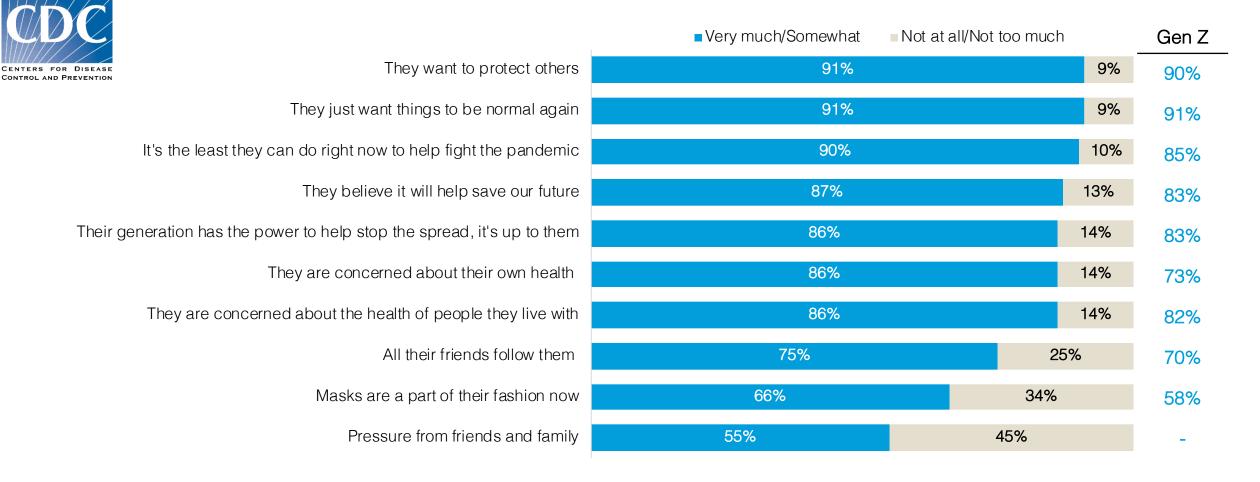
—Miss going to church



#### W7 W8 W9 W10 W11 W12 W13 W14 W15 W16 W17 W18 W19 W20 W21 W22 W23 W24 W25 W26 W27 W28 W29 W30 W31 W32 W33 (4/13) (4/20) (4/27) (5/3) (5/10) (5/17) (5/28) (5/31) (6/8) (6/15) (6/20) (6/29) (7/4) (7/12) (7/19) (7/26) (7/2) (8/9) (8/16) (8/23) (8/30) (9/5) (9/12) (9/19) (9/26) (10/3) (10/10)

#### Americans – Even Gen Z – Are Staying Vigilant to Protect Others

How much do each of the following reasons drive your decision to follow COVID-19 safety recommendations?



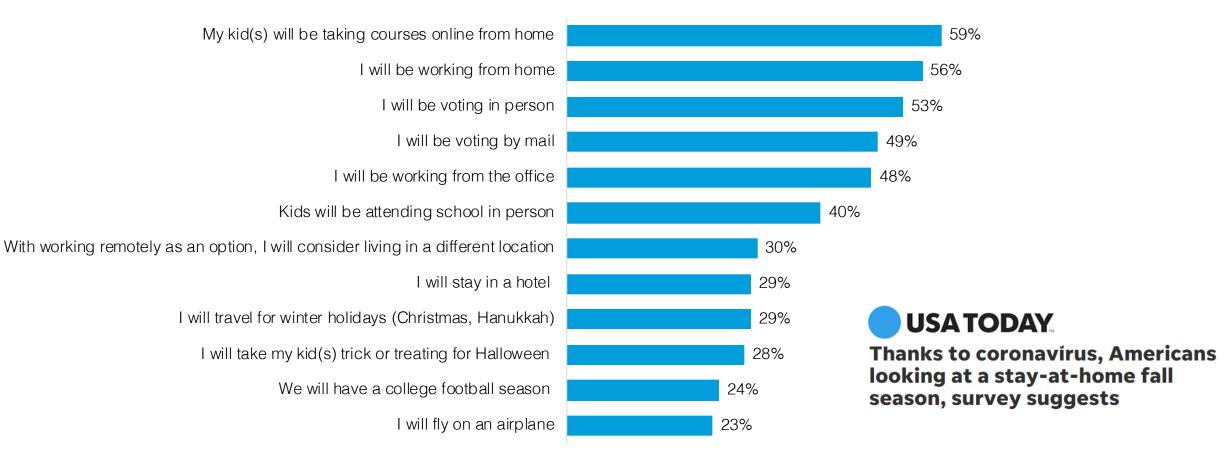
Source: Harris Poll COVID19 Tracker Wave 26 and CDC Special Repot on Americans 16-23

BASE: VARIABLE BASES

CDC14. How much do each of the following reasons drive your decision to follow COVID-19 safety recommendations? Harris Insights & Analytics LLC, A Stagwell Company © 2020

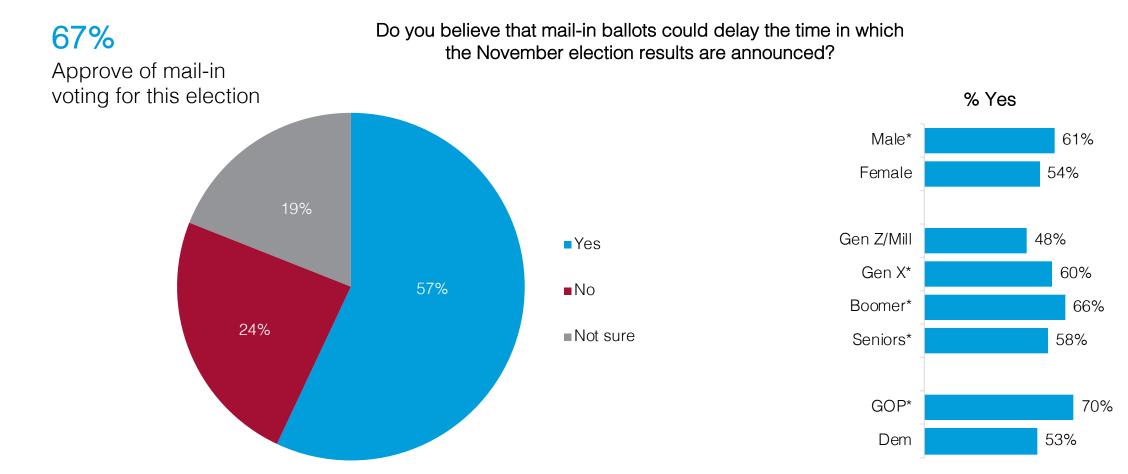
#### Looking Ahead, Americans Are Planning a 'Stay-at-Home' Fall Season

#### How likely or unlikely are these things going to happen this fall? % of Likely



Source: Harris Poll COVID-19 Tracker Wave 25, August 14-16, 2020

#### Most Are Expecting a Delayed Winner to the Election



Source: Harris Poll COVID19 Tracker Wave 31 <u>BASE: GENERAL PUBLIC W31 (n=1971)</u> MB01. Do you believe that mail-in ballots could delay the time in which the November election results are announced?

#### And Majority Are Skeptical of Politics in Approval for a COVID Vaccine

How confident are you the federal government's approval of a COVID-19 vaccine will not be motivated or influenced by politics?



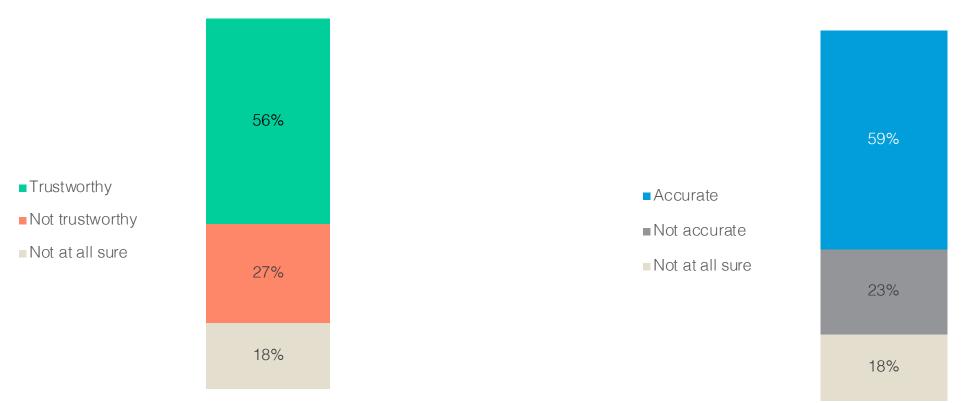
Source: Harris Poll COVID19 Tracker Wave 31 BASE: GENERAL PUBLIC W31 (n=1971)

VAC03 How confident are you the federal government's approval of a COVID-19 vaccine will not be motivated or influenced by politics? Harris Insights & Analytics LLC, A Stagwell Company © 2020

#### Instead, Americans Are Placing Their Bets on Rapid Testing

Abbott Laboratories recently announced they will be releasing a COVID-19 rapid test that costs \$5 and will return results in about 15 minutes. How trustworthy would you find such a test?

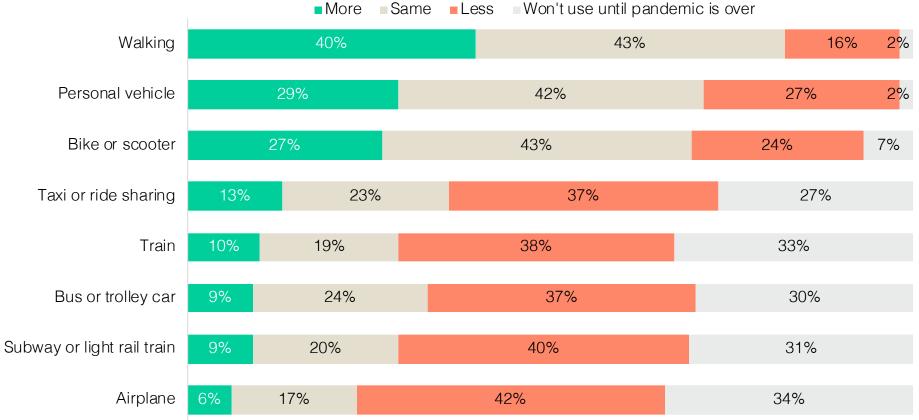
How accurate do you believe this Abbott rapid test would be in determining if a person has COVID-19??



#### Out is 'In' This Year (And Traveling Solo)



Of Americans are interested in **taking a road trip** due to the pandemic Given the ongoing COVID-19 pandemic, would you say you are using the following types of transportation more or less to get around than you did before the pandemic?

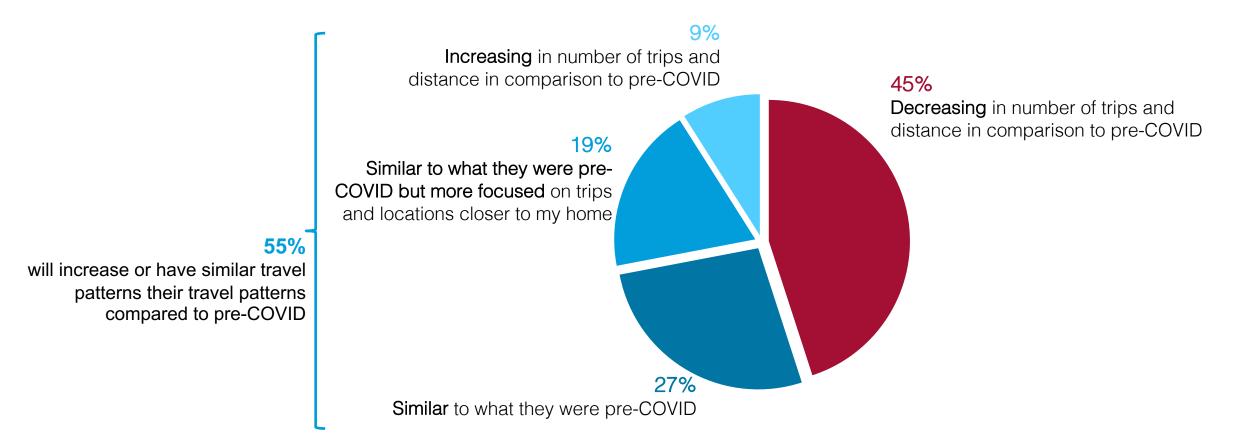


Base: Applicable Responses

Q1. Given the ongoing COVID-19 pandemic, would you say you are using the following types of transportation more or less to get around than you did before the pandemic? Q16. With social distancing restrictions due to the COVID-19 pandemic put into place, how interested are you in each of the following types of alternate activities?

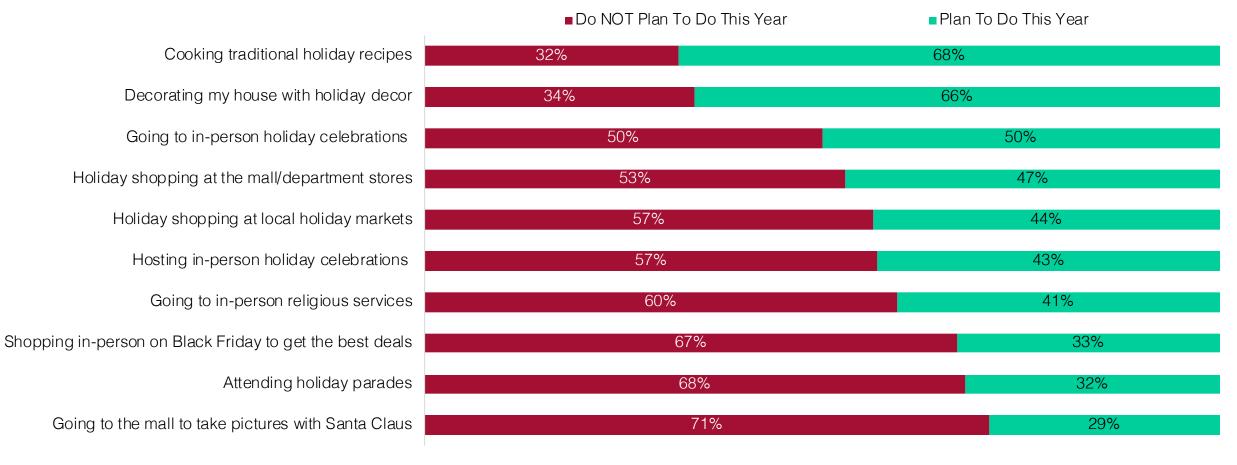
#### Americans Say They'll Still Travel, But Closer to Home

Thinking ahead to the next few months, which statement best aligns with your typical local travel patterns?



#### Most To Avoid Public Rituals Like Malls, Black Friday... Even Santa

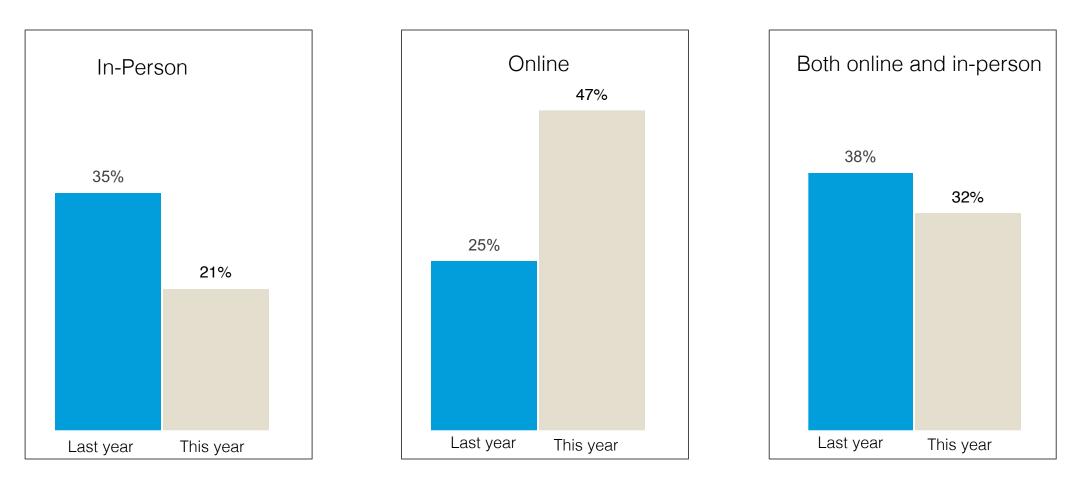
Thinking about your holiday rituals, which of the following did you do last year that you don't plan on doing this year?



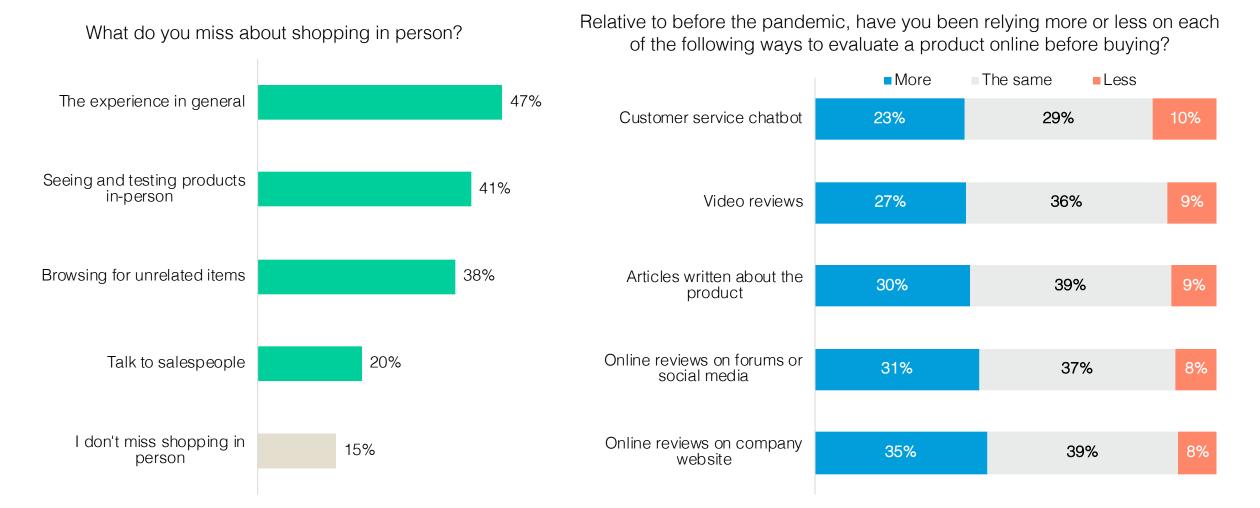
Source: Harris Poll / Bloomberg Holiday Survey, September 29 - October 1, 2020 n=2,064 Harris Insights & Analytics LLC, A Stagwell Company © 2020

#### Holiday Shopping Is Going Digital This Year

Thinking back to last year, did you do your shopping for the holidays in-person or online? Thinking ahead to the upcoming holiday shopping season, do you plan to do your shopping in-person or online?



#### **Consumers Miss Experience of Shopping; Supplanting With Digital**



Source: Harris Poll COVID19 Tracker Wave 26

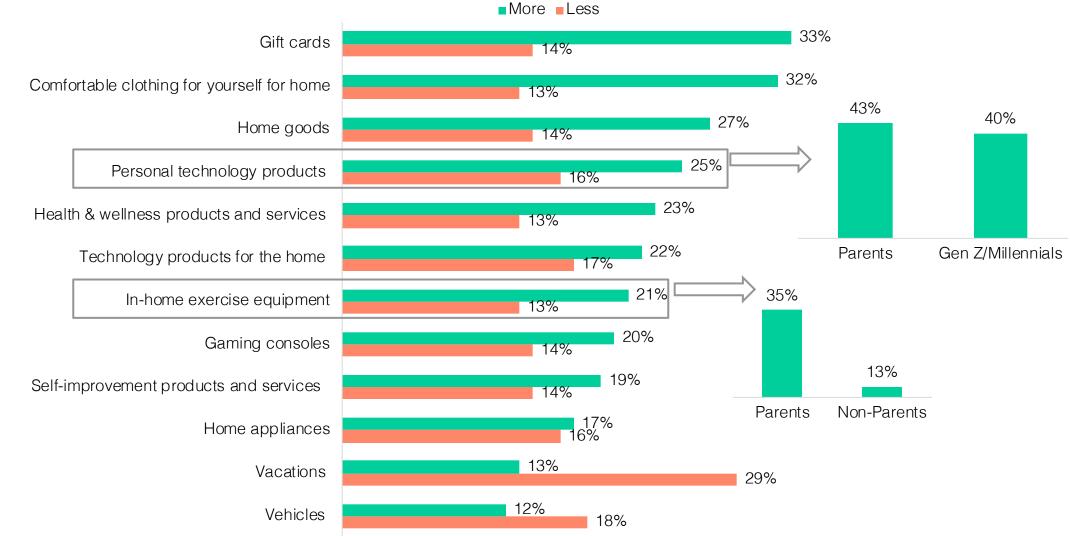
BASE: ALL QUALIFIED RESPONDENTS (1962)

ONL02 What do you miss about shopping in person?

ONL03 Relative to before the pandemic, have you been relying more or less on each of the following ways to evaluate a product online before buying?

#### This Holiday Season, Consumers Are Buying Products Over Experiences

Are you more or less likely this holiday season to purchase the following types of items compared to last year?

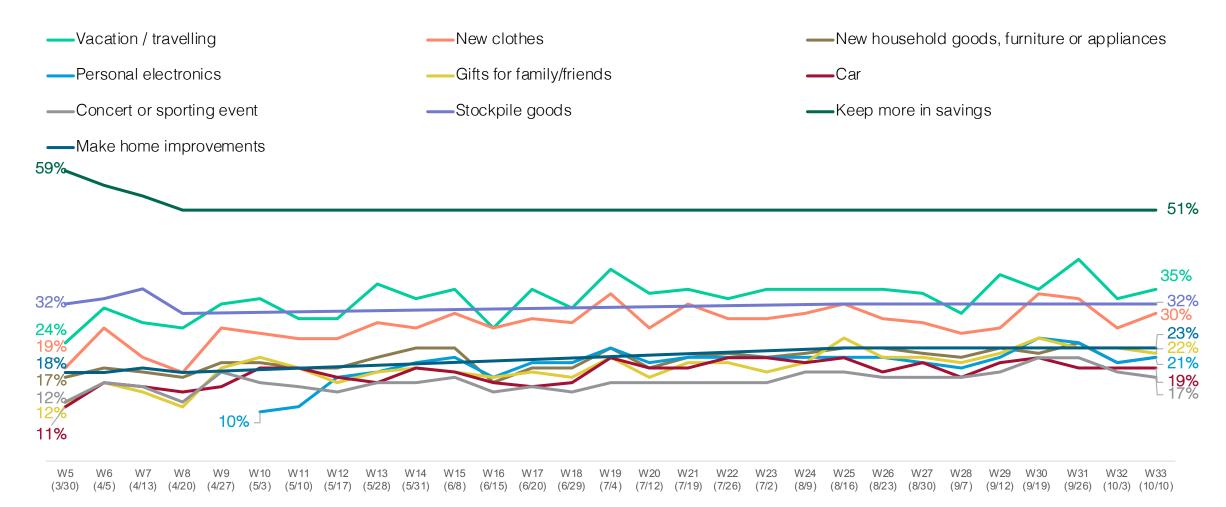


Source: Harris Poll / Bloomberg Holiday Survey, September 29 - October 1, 2020 n=2,064 Harris Insights & Analytics LLC, A Stagwell Company @ 2020

#### Amid Uncertainty, Biggest Enemy of Consumption Is Savings

Are you planning any major purchases once things return to normal and businesses re-open?

-

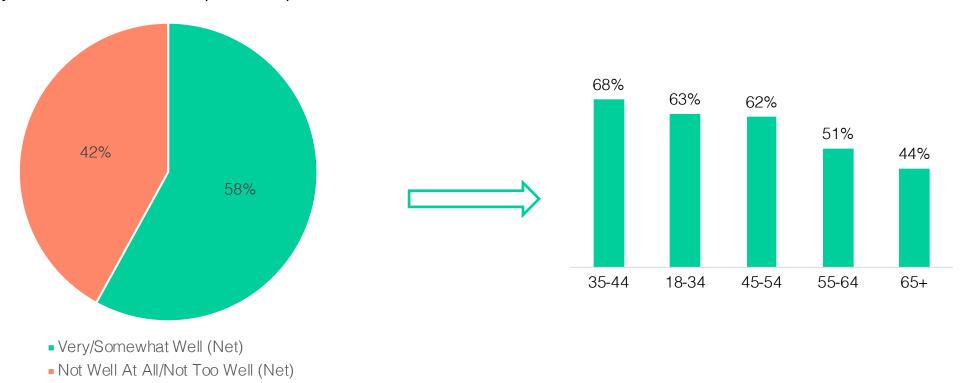


Source: Harris Poll COVID19 Tracker Wave 5-26 <u>BASE: GENERAL PUBLIC</u> REV01 Are you planning any major purchases once things return to normal and businesses re-open? Harris Insights & Analytics LLC, A Stagwell Company © 2020

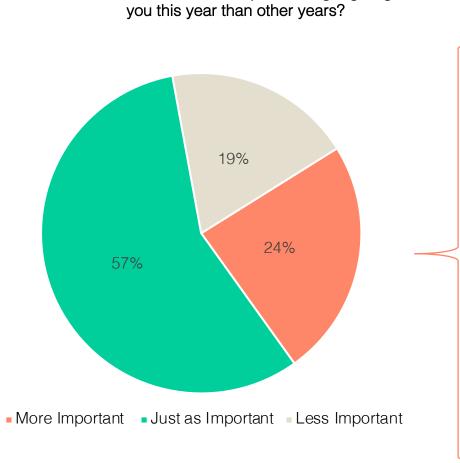
#### Nearly Three-Fifths Say They Will Have Less Spending Money For the Holidays

How well does the following statements apply to you personally?

I have less spending money for the holidays this year due to the economic impact of the pandemic

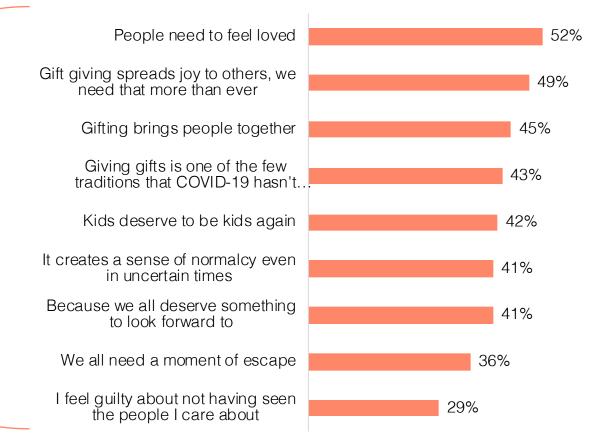


#### But Majority Say Gift Giving Will Be Just as or More Important This Year



How much more or less important is gift-giving to

For which of the following reasons is gift giving more important to you this year than other years? Please select all that apply:



## Thank you!

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