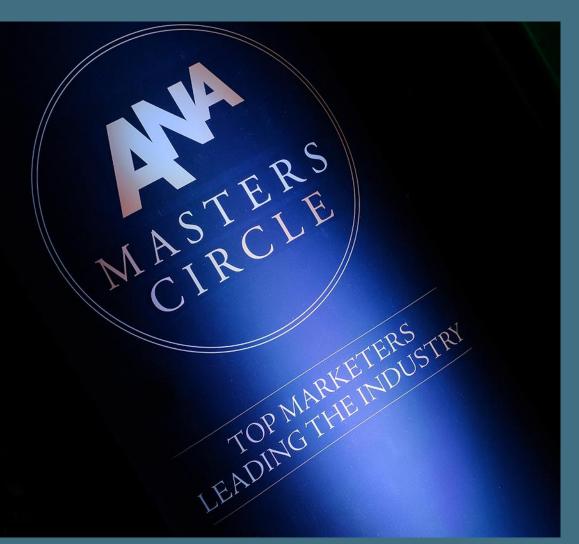
CMO Executive Forum

Post-Election Implications for America in 2021



November 16, 2020









The Global CMO Community

- The ANA Masters Circle 1,400 CMOs leading the industry Growth Agenda
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America 2021: Post-Election Implications

Essential CMO Insights Harris Poll Series From The Global CMO Growth Council and The Harris Poll

November 16, 2020

Mark Penn, Chairman The Harris Poll <u>mjp@mdc-partners.com</u>

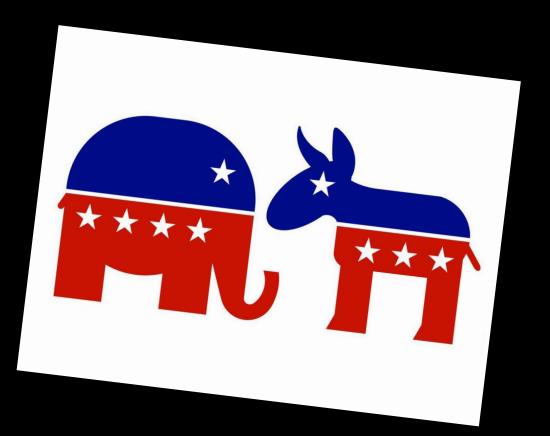
John Gerzema, CEO The Harris Poll jgerzema@harrisinsights.com



ONE COUNTRY







MEDIA NARRATIVE



DATA ANALYSIS









RALLY / **EVENTS**

ADVERTISING / SOCIAL MEDIA



Joe Biden

Sponsored + Paid for by BIDEN VICTORY FUND Look, I'm a guy who knows how to work across the aisle. I won't just be a Democratic president, I'll be an American president. But I need your help to put the darkness of the past four years behind us. Can you make a donation to help us move forward as a country? Every dollar helps us turn the page and elect folks who will unite this country



Joe Biden

Sponsored + Paid for by BIDEN VICTORY FUND I'm no stranger to working across the aisle. That's why I've been endorsed by a number of prominent Republicans like John Kasich and Cindy McCain. These folks know me, and they know that together we can unite this country if we win. So, please, will you make a donation today to help us turn the page on these four years of division? Every dollar helps us elect leaders wh...

> JOE WILL WORK ACROSS THE AISLE

+ DONATE NOW +









PANDEMIC FATIGUE ELECTION FATIGUE



BACK TO BUSINESS



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



2020 US Presidential Election Pollster Ratings

Updated: November 10, 2020

The following table lists the preliminary accuracy of pollsters in the November 3, 2020 US presidential election using the measure of polling accuracy <u>proposed</u> by Martin, Traugott, and Kennedy.

An accuracy measure of 0.00 indicates that the odds ratio of the survey results matches the odds ratio of the actual results (the closer to 0.00, the better).

	Biden	Trump	Odds Ratio	Accuracy
IBD/TIPP	50%	46%	1.02	0.02
The Hill/HarrisX	49%	45%	1.02	0.02
Emerson	50%	45%	1.04	0.04
Rasmussen Reports	48%	47%	0.95	-0.05
Reuters/Ipsos	52%	45%	1.08	0.08
JTN/RMG	51%	44%	1.08	0.08
SurveyUSA	52%	44%	1.11	0.10
Fox News	52%	44%	1.11	0.10
USA Today/Suffolk	52%	44%	1.11	0.10
NYT/Siena	50%	41%	1.14	0.13
Economist/YouGov	53%	43%	1.15	0.14*
CNBC/Change	52%	42%	1.16	0.15*
NBC News/WSJ	52%	42%	1.16	0.15*
USC Dornsife	54%	43%	1.17	0.16*
Quinnipiac	50%	39%	1.20	0.18*
CNN	54%	42%	1.20	0.18*
Actual	50.8%	47.5%		

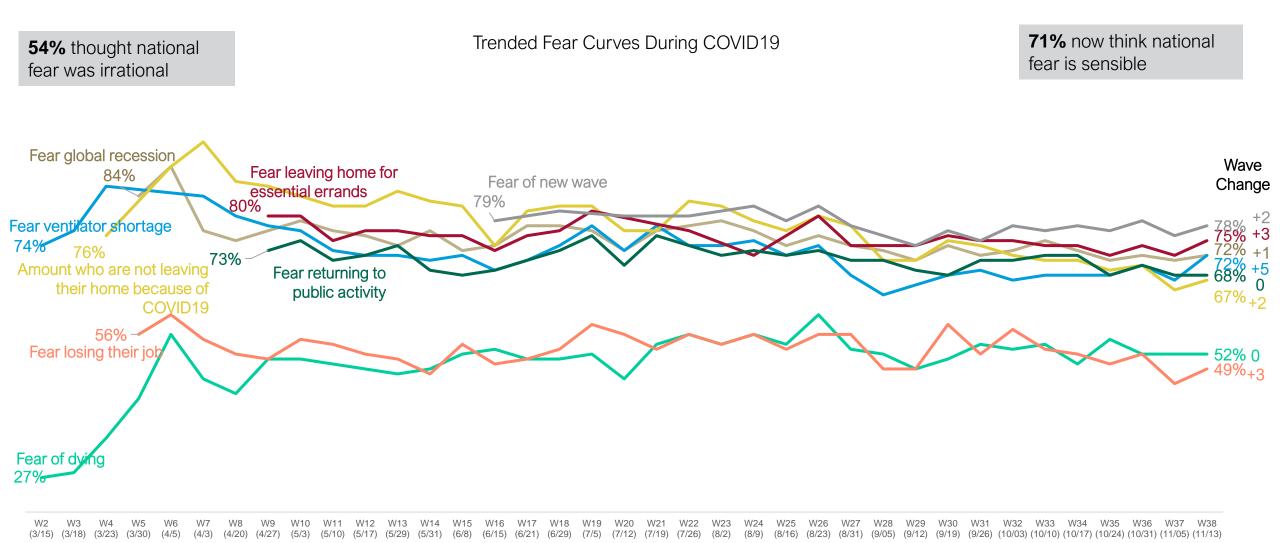
2020 US President

WHO DO YOU TRUST?





The Task for Communicators: Lifting the Curtain of Fear



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

Returning to Life As Normal Becomes More Pessimistic

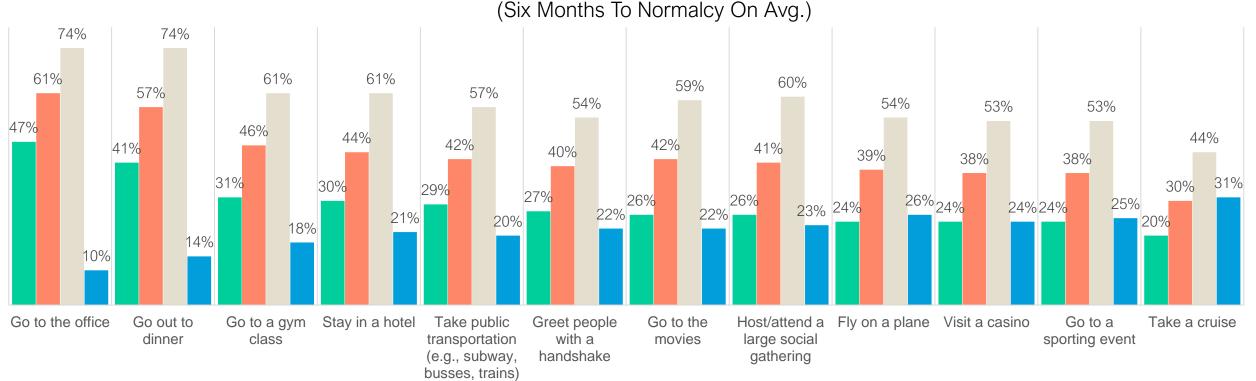
Once the government provides information that the spread of the virus is flattening how long will it take you to do each of the following?

Immediately/1-30 days up to 3 months up to 6 months





Poll: Two-Thirds Of Americans Won't Travel For At Least Three Months After COVID-19 **Subsides**

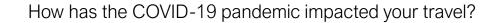


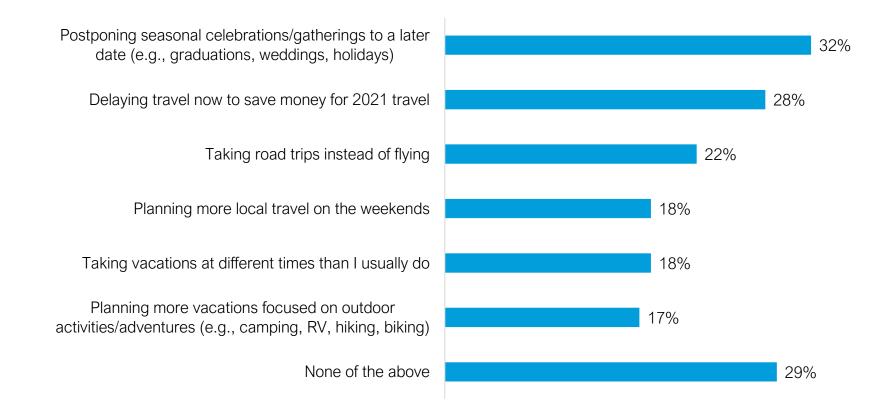
Source: Harris Poll COVID19 Tracker Wave 38

BASE: GENERAL PUBLIC W38 (n=1963)

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? Harris Insights & Analytics LLC, A Stagwell Company © 2020

Americans Are Postponing Celebrations or Delaying Travel Until the Reopening





Source: Harris Poll COVID19 Tracker Wave 38 <u>BASE: GENERAL PUBLIC W38 (n=1963)</u> S03 How important do you believe it will be for brands/companies to gear public messages or slogans towards "unity"?

But Vaccine Breakthrough Is Causing Cautious Optimism

With news of an effective vaccine on the way how optimistic are you that we will return to normal sooner rather than later?

Now that we know there's an effective vaccine in development, if everyone could verify they were vaccinated before attending a public event, would you feel safe going to the following public events/places?

% Safe



Source: Harris Poll COVID19 Tracker Wave 38 BASE: GENERAL PUBLIC W38 (n=1963)

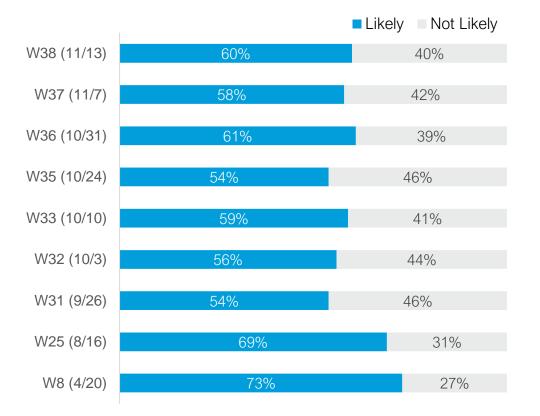
P04 With news of an effective vaccine on the way how optimistic are you that we will return to normal sooner rather than later?

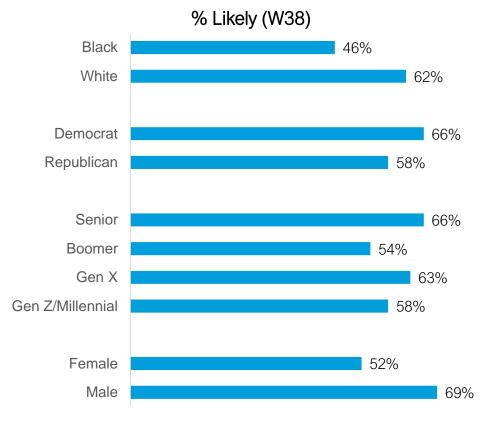
P05 Now that we know there's an effective vaccine in development, if everyone could verify they were vaccinated before attending a public event, would you feel safe going to the following public events/places?

Harris Insights & Analytics LLC, A Stagwell Company © 2020

Three-Fifths Will Get a Vaccine As Soon as Possible, Though Less Than in April

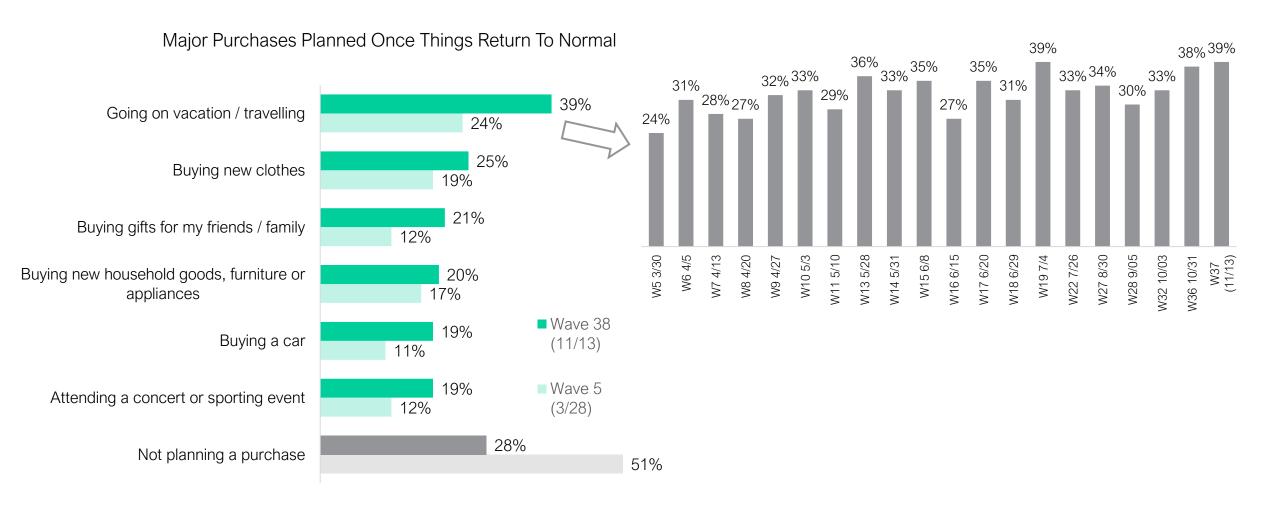
How likely are you to get a COVID-19 vaccine as soon as it becomes available?





Source: Harris Poll COVID19 Tracker Wave 38 BASE: GENERAL PUBLIC W38 (n=1963) LI05X How likely are you to get a COVID-19 vaccine as soon as it becomes available?

Pent-Up Demand is Building Across Categories ('Revenge Spending')



Source: Harris Poll COVID19 Tracker Wave 38

BASE: GENERAL PUBLIC W38 (n=1963)

REV01 Are you planning any major purchases once things return to normal and businesses re-open? Please select all that apply.

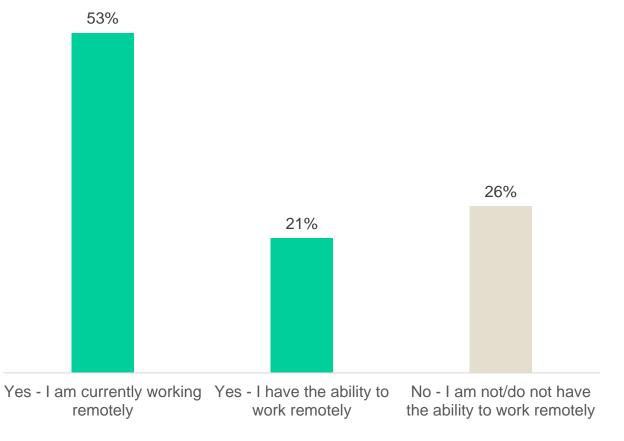
THE HARRIS POLL: COVID-19 IN THE U.S.

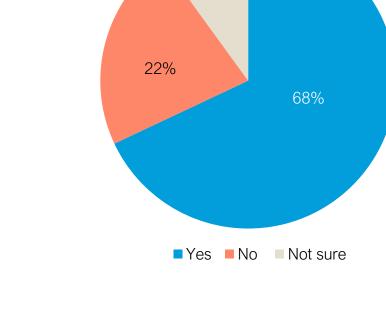
Nearly 7 in 10 Remote Workers Would Consider Taking a "Work-cation"

Are you currently working, or do you have the ability to work, remotely?

Would you consider taking a work-cation (i.e., a vacation that one spends getting work done)?

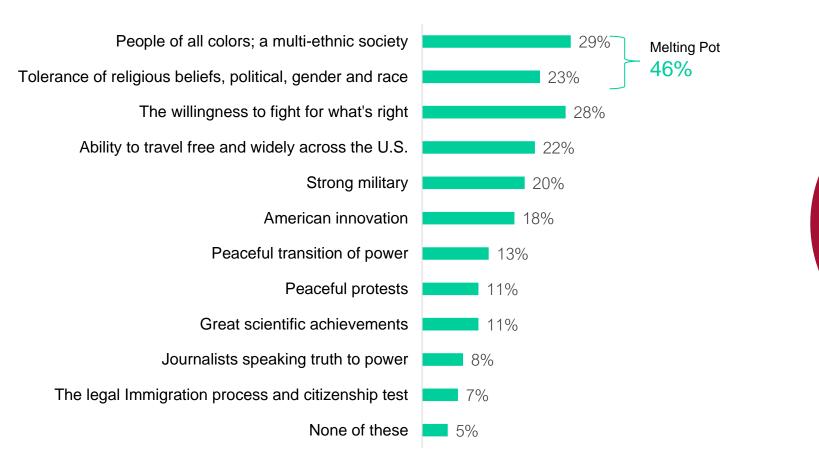
10%





Source: Harris Poll COVID19 Tracker Wave 27 <u>BASE: EMPLOYED (1143)</u> RW03. Are you currently working, or do you have the ability to work, remotely? <u>BASE: CURRENTLY WORKING/HAVE ABILITY TO WORK REMOTELY (870)</u> RW04. Would you consider taking a work-cation (i.e., a vacation that one spends getting work done)? Harris Insights & Analytics LLC, A Stagwell Company © 2020

American Dream Is Alive; America's Greatness Driven by Diversity/Tolerance



What most captures what makes America great?

41%

Are you living/do you expect to

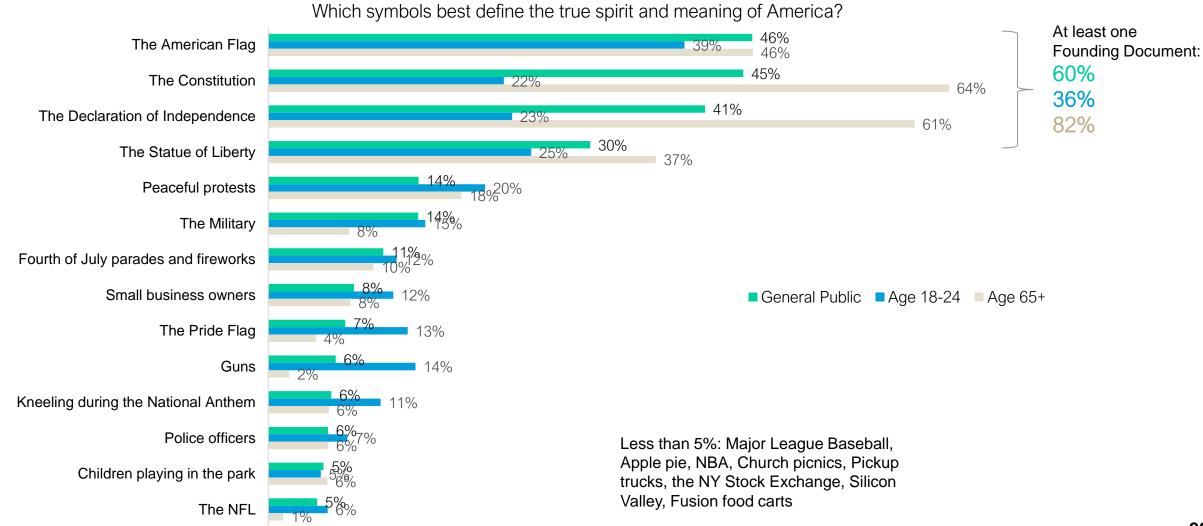
achieve the American Dream?

Yes

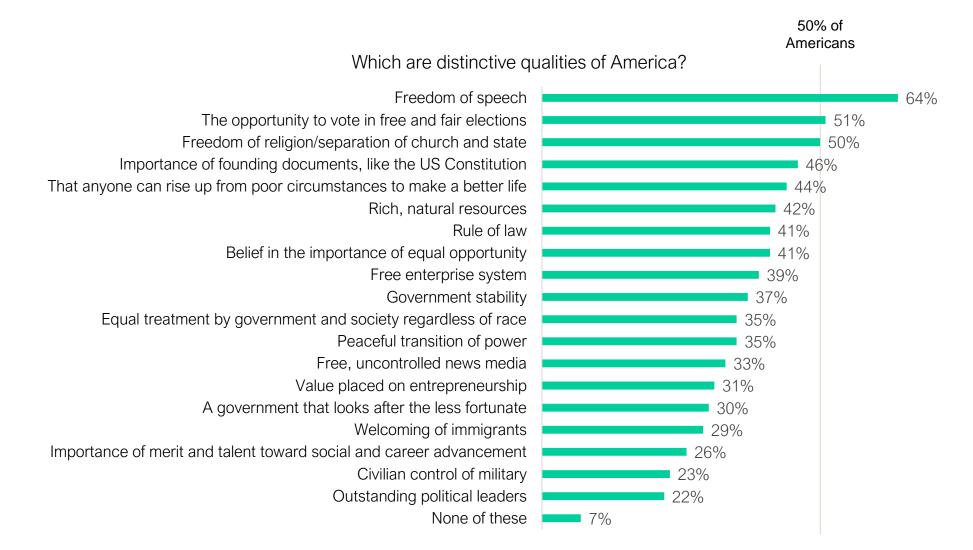
No

59%

Symbols of America Still Resonate: Constitution, the Flag, Statue of Liberty

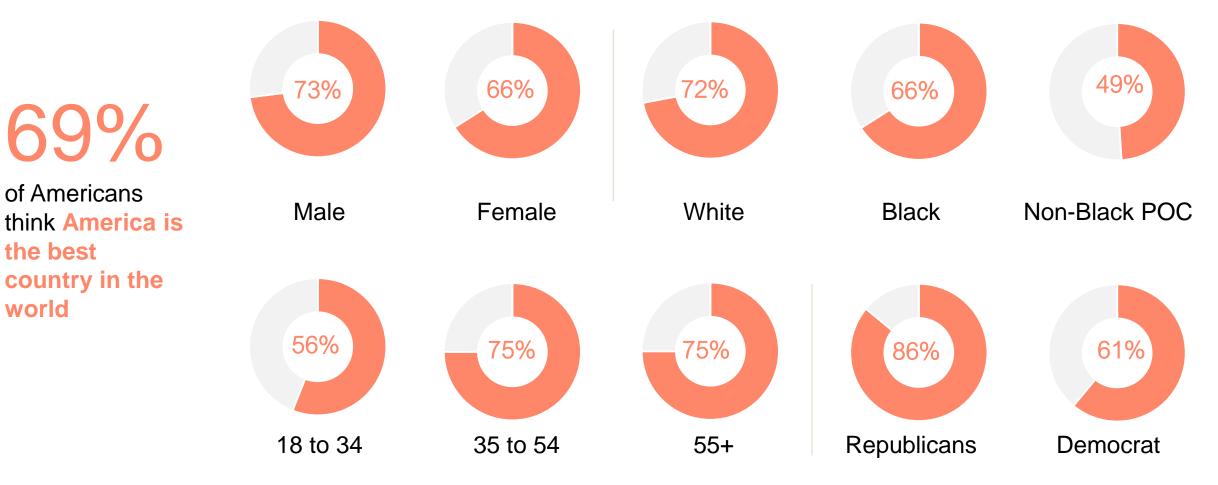


Americans Agree Freedom of Speech, Free Elections Are Distinctively American



Q5: And which of these would you consider distinctive qualities of America, if any? Please select all that apply.

Most Americans Think America Is the Best Country in the World

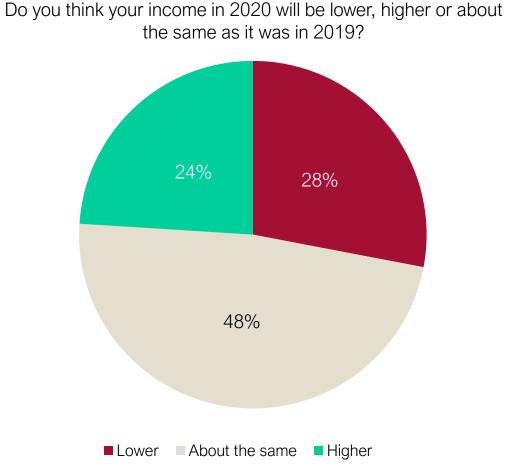


-

Q22 Do you think America is the best country in the world? Source: Survey conducted with n=2000 gen pop Americans between October 15 and October 20.

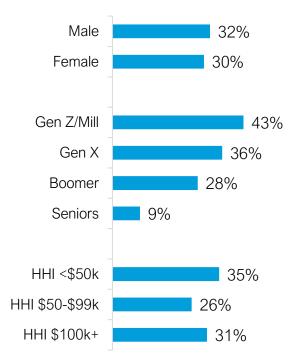
-

Three Quarters of Americans Expect to Have Same or Higher Income in 2020



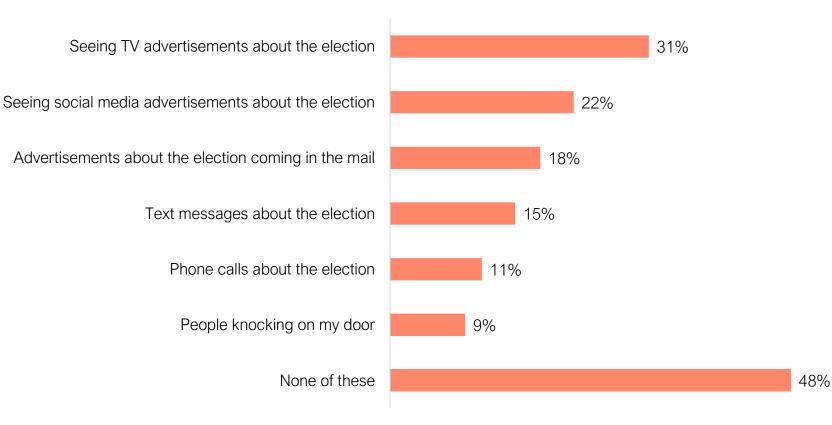
31%

have sought out new/additional sources of income



Did Record Political Advertising Work?

Which of the following forms of political advertisements would make you more encouraged to vote in a presidential election?

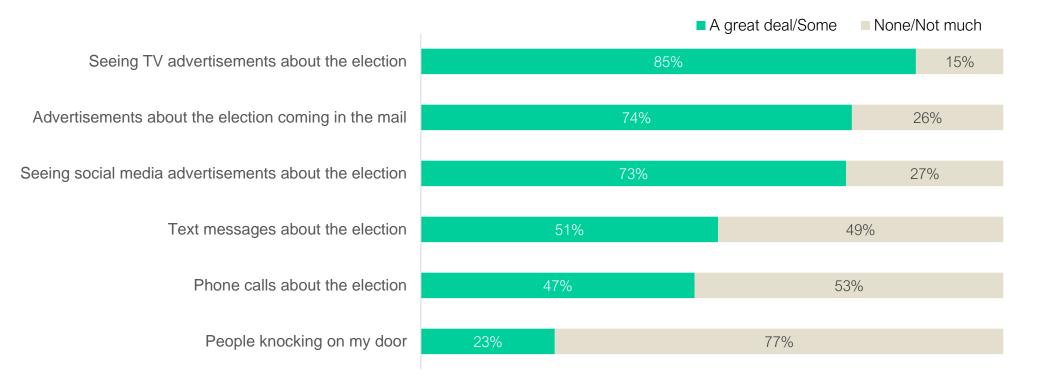


Source: Harris Poll COVID19 Tracker Wave 38 <u>BASE: GENERAL PUBLIC (1963)</u> J07 Which of the following forms of political advertisements would make you more encouraged to vote in a presidential election? Please select all that apply.

Harris Insights & Analytics LLC, A Stagwell Company © 2020

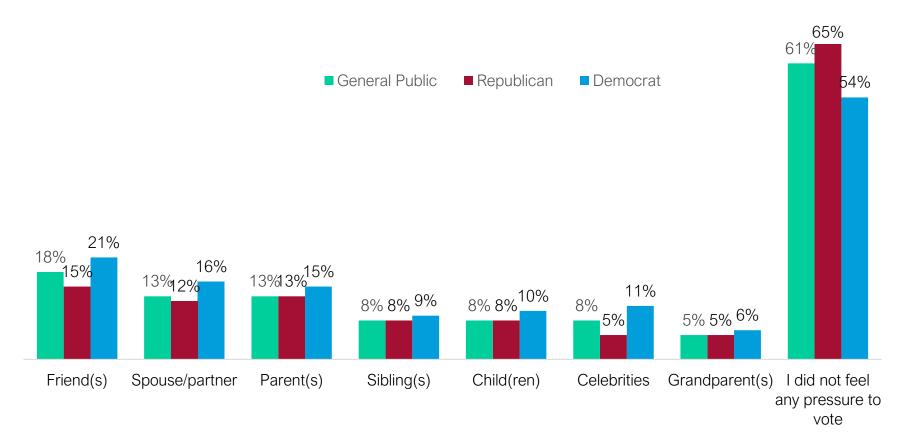
Most Saw Advertisements for 2020 Election; Half Were Personally Canvassed

During the 2020 election season, how much of each of the following have you experienced?



Many Americans Felt Family Pressure to Vote

From which of the following people did you feel pressure to vote in the 2020 presidential election?



Source: Harris Poll COVID19 Tracker Wave 38 <u>BASE: VOTED IN 2020 ELECTION (N=1681)</u> J04 From which of the following people did you feel pressure to vote in the 2020 presidential election? Please select all that apply.



Q&A

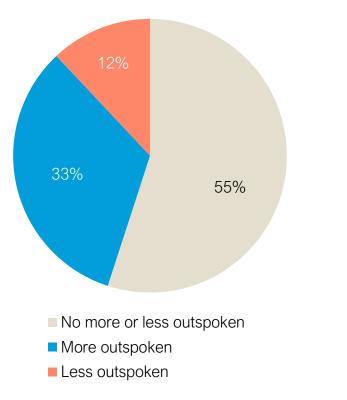
Thank you!

Mark Penn, Chairman, The Harris Poll mark.penn@stagwellgroup.com

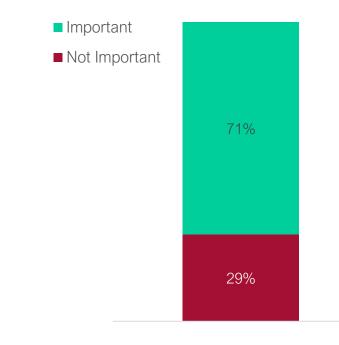
John Gerzema, CEO, The Harris Poll jgerzema@harrisinsights.com

One-Third Expect Companies And Brands to Be More Outspoken

After the 2020 presidential election, do you expect brands/companies to be more outspoken, less outspoken, or no more or less outspoken?



How important do you believe it is for brands/companies to gear public messages or slogans towards "unity"?



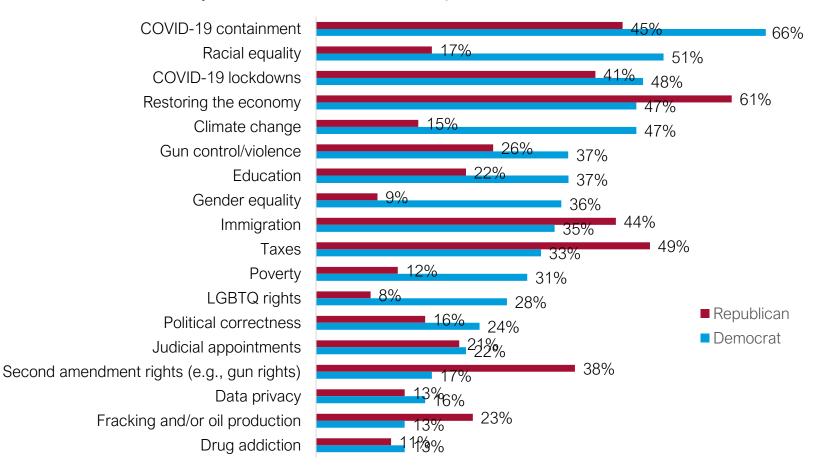
Source: Harris Poll COVID19 Tracker Wave 38 BASE: GENERAL PUBLIC (1963)

S02 After the 2020 presidential election, do you expect brands/companies to be more outspoken, less outspoken, or no more or less outspoken? S03 How important do you believe it will be for brands/companies to gear public messages or slogans towards "unity"?

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Democrats Voted on Containment, While Republicans Voted on Lockdowns

Which of the following were among the <u>most important issues</u> facing you and your family when you went into vote in the 2020 presidential election?

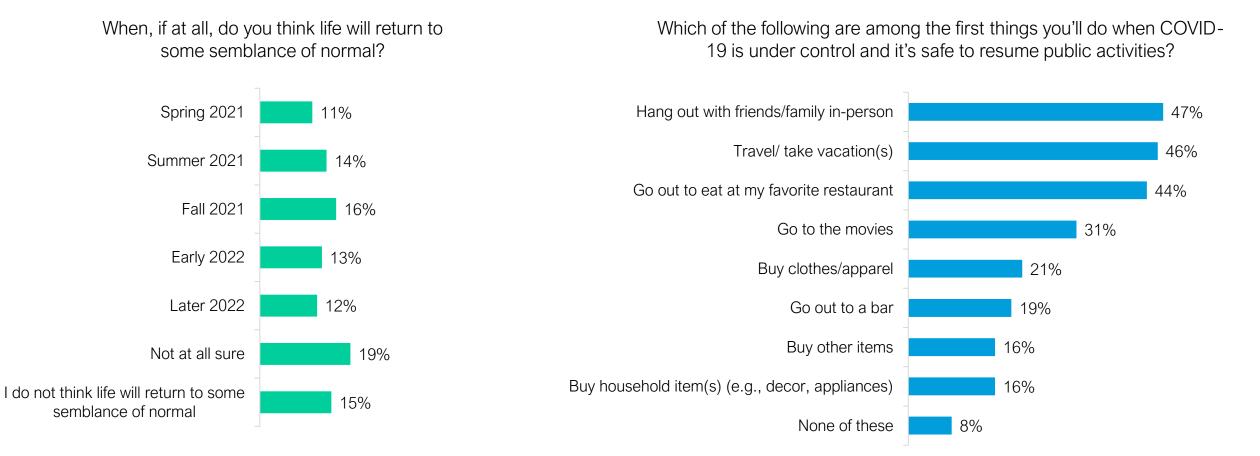


Source: Harris Poll COVID19 Tracker Wave 38 BASE: VOTED IN 2020 ELECTION (N=1681)

J05 Which of the following were among the most important issues facing you and your family when you went into vote in the 2020 presidential election? Please select all that apply.

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

Americans Don't Have a Clear End Date in Mind



Source: Harris Poll COVID19 Tracker Wave 38 BASE: GENERAL PUBLIC W38 (n=1963)

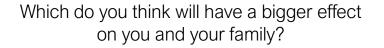
J14 When, if at all, do you think life will return to some semblance of normal?

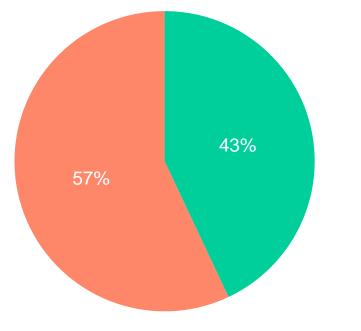
J15 Which of the following are among the first things you'll do when COVID-19 is under control and it's safe to resume public activities? Please select all that apply.

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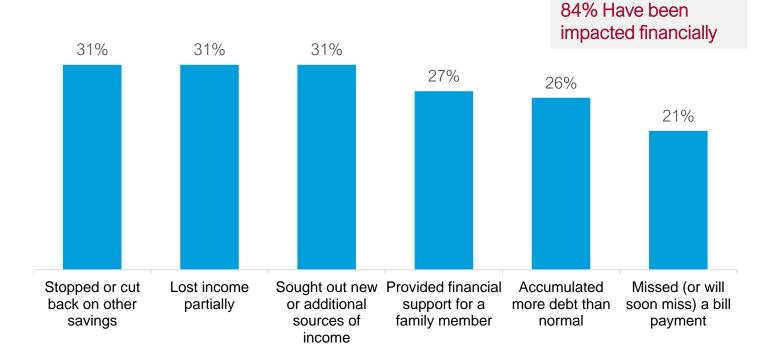
-

Economic Impact Will Have a Bigger Effect Personally Than the Virus Itself





As a result of the current pandemic, have you or your household been impacted financially in any of the following ways?



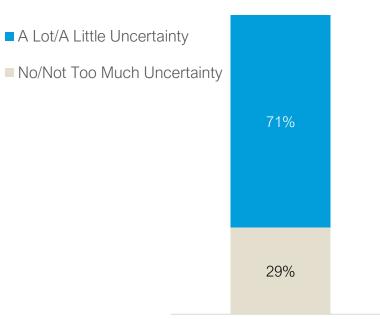
Coronavirus/COVID-19 itself

The economic impacts of the coronavirus pandemic

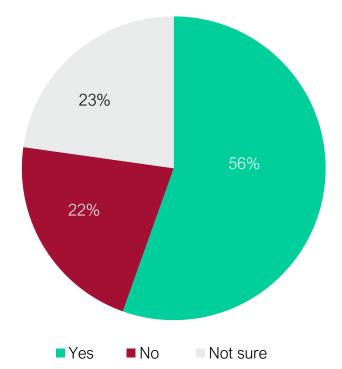


Election Is Causing Economic Uncertainty, Especially on Holiday Spending

How much does the 2020 presidential election cause you to have uncertainty about the economy?



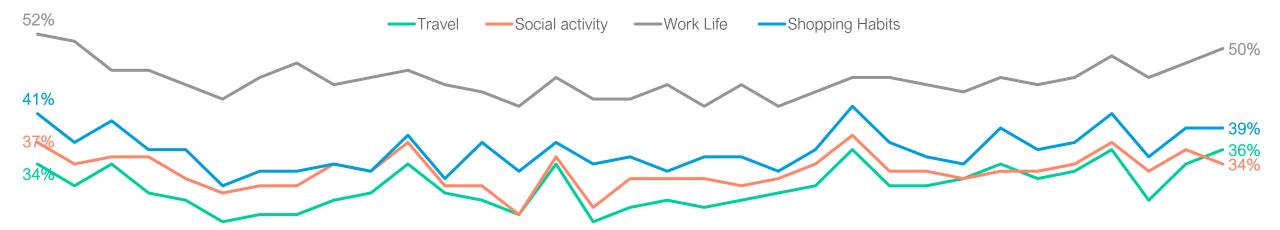
Are you planning to be conservative in your holiday spending as a result of this uncertainty you feel about the economy?



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

Returning to Life as it Was Before Feels Less and Less Realistic

Once the pandemic is over, what do you think will be very different, somewhat different or mostly the same? (% saying 'mostly the same' after COVID-19)

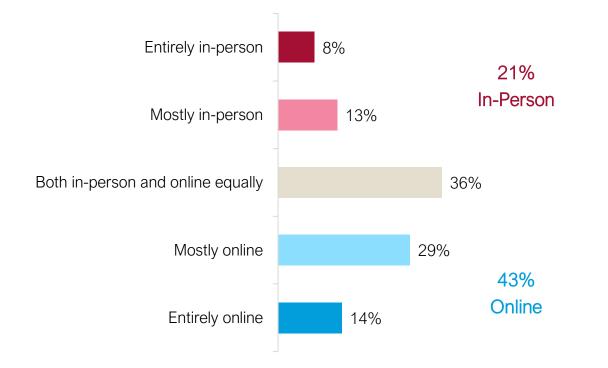


W7 W8 W9 W10 W11 W12 W13 W14 W15 W16 W17 W18 W19 W20 W21 W22 W23 W24 W25 W26 W27 W28 W29 W30 W31 W32 W33 W34 W35 W36 W37 W38 (4/20) (4/27) (5/3) (5/10) (5/17) (5/29) (5/31) (6/8) (6/15) (6/21) (6/29) (7/5) (7/12) (7/19) (7/26) (8/2) (8/9) (8/16) (8/23) (8/31) (9/05) (9/12) (9/19) (9/26) (10/03) (10/10) (10/17) (10/24) (10/31) (11/05) (11/13) (4/5)(4/3)



Holiday Shopping Will Be Online; Most Have Less Spending Money This Year

Thinking ahead to the upcoming holiday shopping season do you plan to do your shopping in-person or online?



How well do each the following statements apply to you personally? % Very/Somewhat Well

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



The pandemic makes me want to spend more money on gifts for my friends and family this holiday season



Source: Harris Poll COVID19 Tracker Wave 38

BASE: PLANS TO SHOP FOR HOLIDAYS (1772)

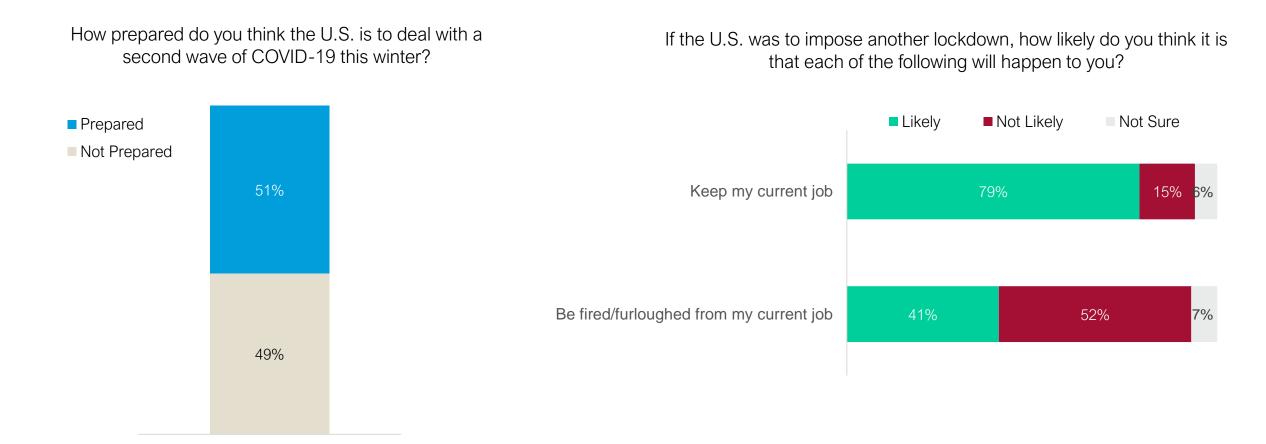
BB4 Thinking ahead to the upcoming holiday shopping season, do you plan to do your shopping in-person or online?

BASE: GENERAL PUBLIC W38 (n=1963) BB4A How well do each of the following statements apply to you personally?

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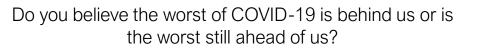


America Is Divided Whether We're Prepared for a Second Wave



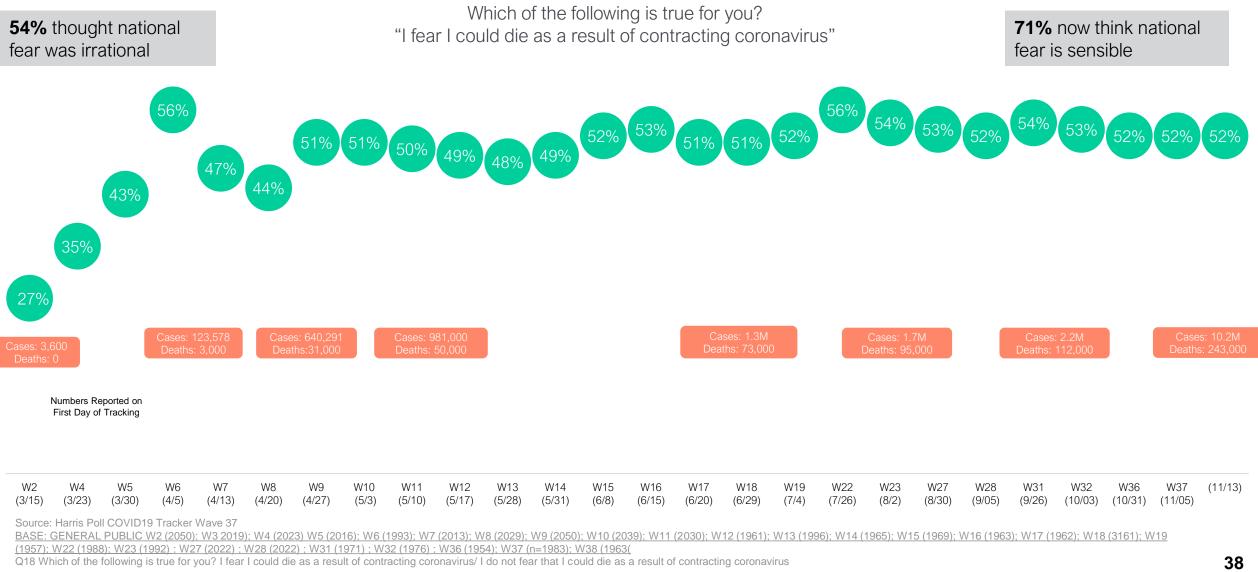
Source: Harris Poll COVID19 Tracker Wave 38 <u>BASE: GENERAL PUBLIC W38 (n=1963)</u> S07 How prepared do you think the U.S. is to deal with a second wave of COVID-19 this winter? <u>BASE: EMPLOYED W38 (n=1154)</u> S06 If the U.S. was to impose another lockdown, how likely do you think it is that each of the following will happen to you? Harris Insights & Analytics LLC, A Stagwell Company © 2020

Most Say the Worst Is Still Ahead of Us



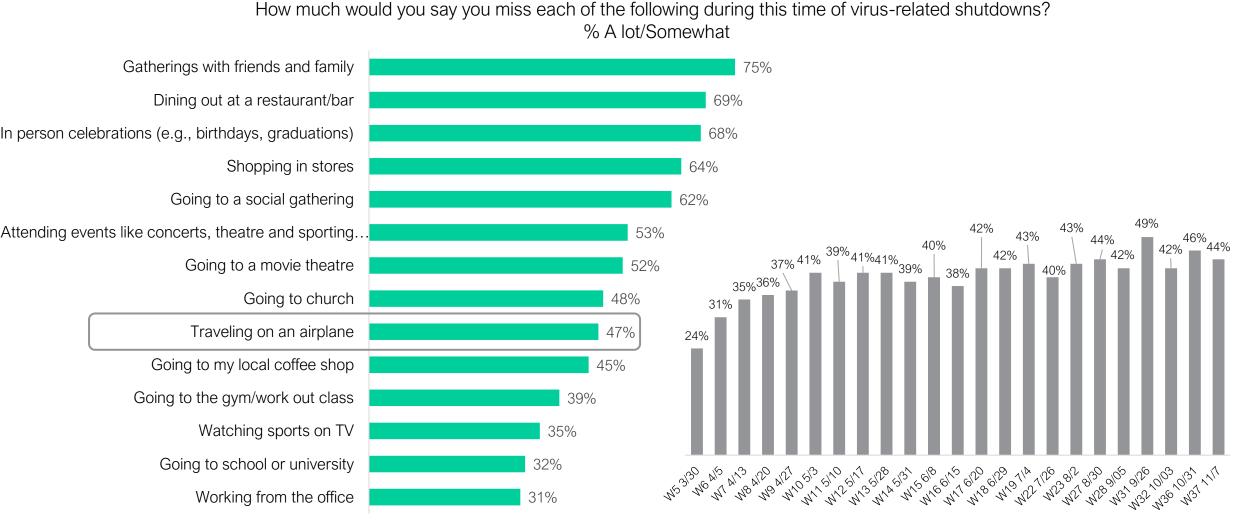
The worst is still ahead of us The worst is behind us 34% 35% 38% 66% 65% 62% W35 W37 W38 (10/24)(11/7)(11/13)

American Fear Remains Ever-Present Even as States Reopen



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

However, Americans Want Their Life Back



Source: Harris Poll COVID19 Tracker Wave 38

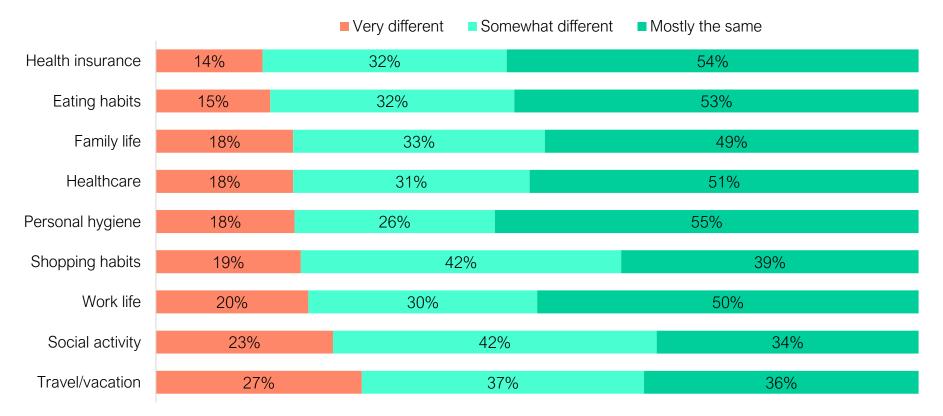
BASE: GENERAL PUBLIC W38 (n=1963)

FR05 How much would you say you miss each of the following during this time of virus-related shutdowns? Harris Insights & Analytics LLC, A Stagwell Company © 2020

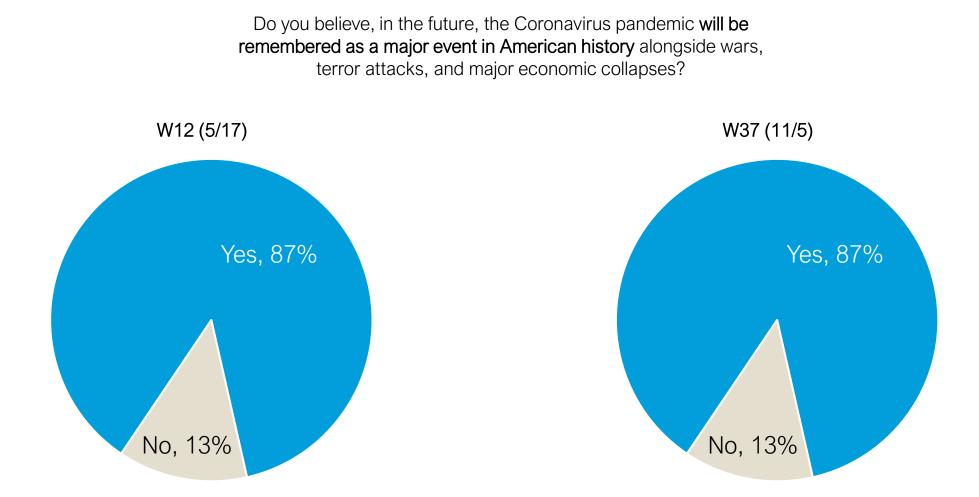


Moving Forward, Americans See Their Lives Changing in Fundamental Ways

Once the pandemic is over and things return to normal, what do you think will be very different, somewhat different or mostly the same?



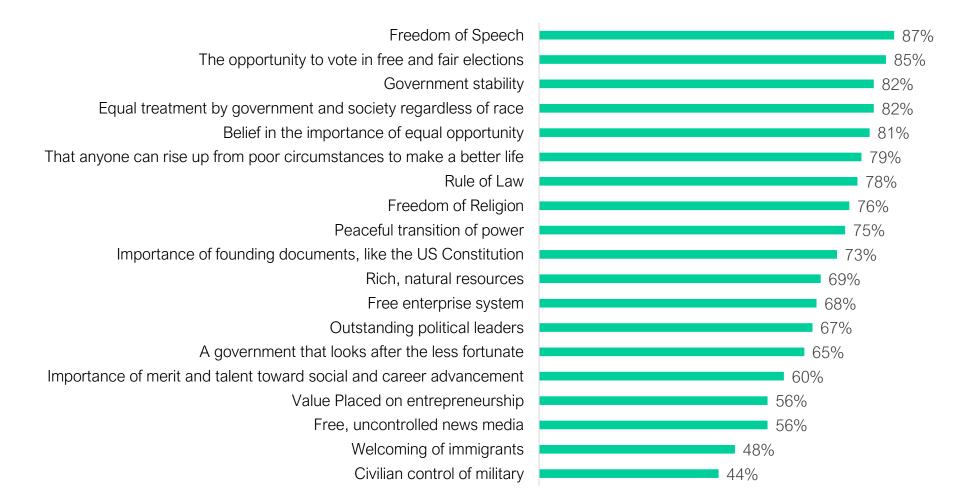
Americans Say Coronavirus Will Be Remembered Alongside Other Major Events



WHAT MAKES AMERICA GREAT

Many Factors Make a Country Great

What is a major contributor to making a country great?



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Q4 In your opinion, which of the following contribute to making a country great? For each, please say whether it is a major contributor, a minor contributor, or not factor.