



ONE YEAR IN: THE LATEST ON WHAT CONSUMERS WANT COMPANIES TO SAY & DO

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INTRODUCTIONS



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MORNING CONSULT IS A **GLOBAL DATA
INTELLIGENCE COMPANY** DELIVERING
INSIGHTS ON WHAT PEOPLE THINK
IN REAL TIME.



Morning Consult delivers better scale, quality, and speed to insight.



UNRIVALED SCALE

Morning Consult's proprietary platform has access to **100+ million people globally**, enabling over 20,000 daily interviews in the 15 largest economies and custom projects in over 100 countries.



UNMATCHED QUALITY

Morning Consult's **industry-leading** sample provider validation process, stratified sampling design, comprehensive attentiveness testing, and advanced weighting methodology is **trusted globally**.

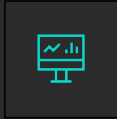


UNPRECEDENTED SPEED

Morning Consult's **state-of-the-art software** processes and visualizes more than 7 trillion unique data points daily, powering **real-time analysis and faster deliverables** than any competitor.



Core Capabilities



BRAND INTELLIGENCE

Marketing, insights and communications leaders rely on our state-of-the-art brand research and analysis technology to deliver real-time, intelligent data on over **3,000 brands and products in 15+ markets**.

- Track **Brand & Reputational Health**
- Monitor **Impact of Crises & Events**
- Benchmark Against **Key Competitors**
- Develop **Robust Audience Profiles**
- Identify **Optimal Channels** & Media Markets
- Track **News Mentions & Social Media** Activity



RESEARCH INTELLIGENCE

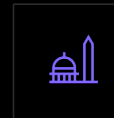
Our global custom survey research solutions give the **flexibility and speed** needed to address issues unique to your brand and deliver the insights needed to power your most important initiatives and KPIs.

- Build **Custom Brand & Issue Trackers**
- Deploy **Rapid Response** Polling
- Determine **Product Positioning & Pricing**
- **Optimize Messaging** & Brand Positioning
- **Test & Improve Advertising** Creative
- Develop **Advocacy & Thought Leadership** Content



ECONOMIC INTELLIGENCE

Tap into global data on key economic indicators, including consumer sentiment and labor conditions among your customers and key audiences.



POLITICAL INTELLIGENCE

Assess political risk with real-time polling data on elections, elected officials, and top issues at the international, national and local level.

Supplemental Insights

WHAT CONSUMERS WANT
COMPANIES TO SAY AND DO

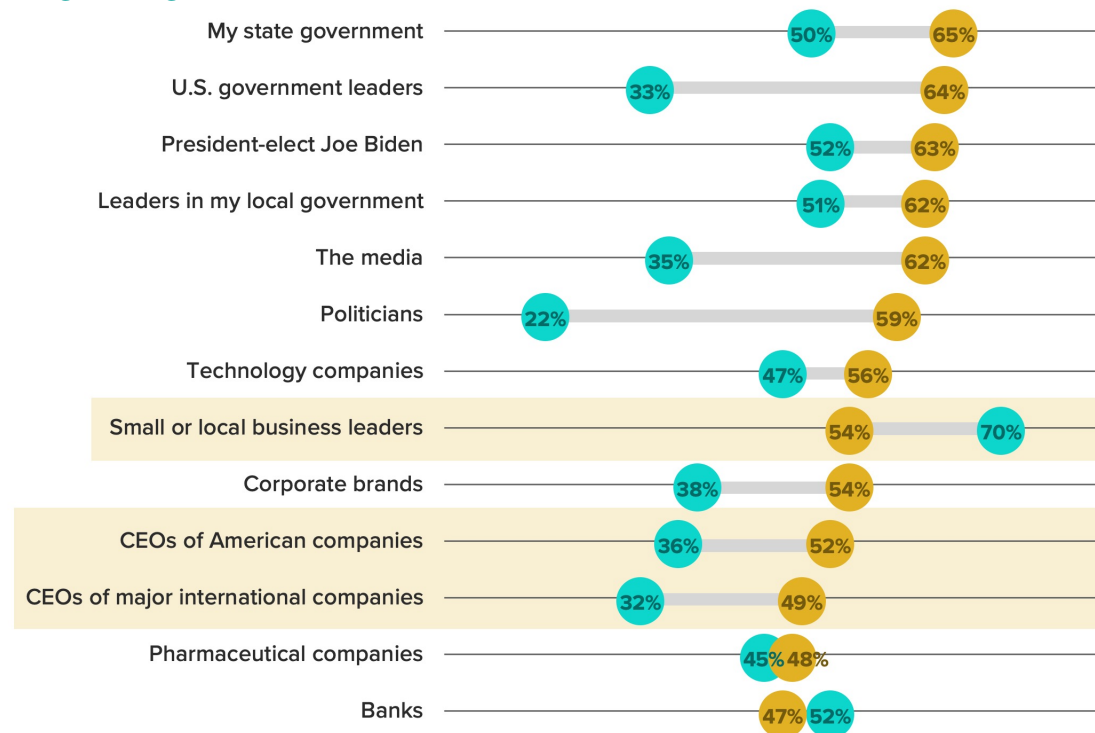
THE CHANGING ROLE OF COMPANIES



A substantial 16-point gap exists between the share of Americans holding companies or their leaders responsible and the share trusting them to do the right thing

Share who said the following were **at least somewhat responsible for influencing cultural or societal change**

& Share who **trust them to do the right thing**



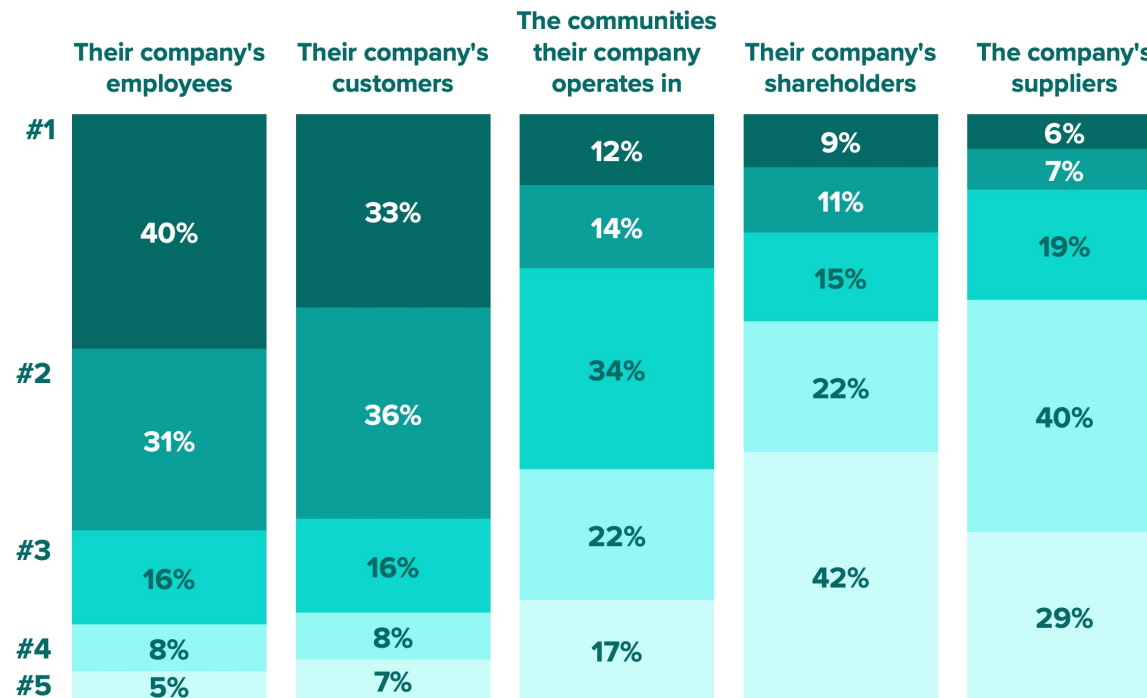
The share trusting small businesses **to do the right thing** eclipses the share who feel they **hold responsibility**

Americans are more likely to say CEOs **hold responsibility** than to say they **trust** them

THE CHANGING ROLE OF COMPANIES

42% think companies should prioritize shareholders last, +10 points from May, while seven in 10 believe a company's employees or customers should be among the top two most-prioritized groups

Order in which companies should **prioritize the interests and well-being** of the following:

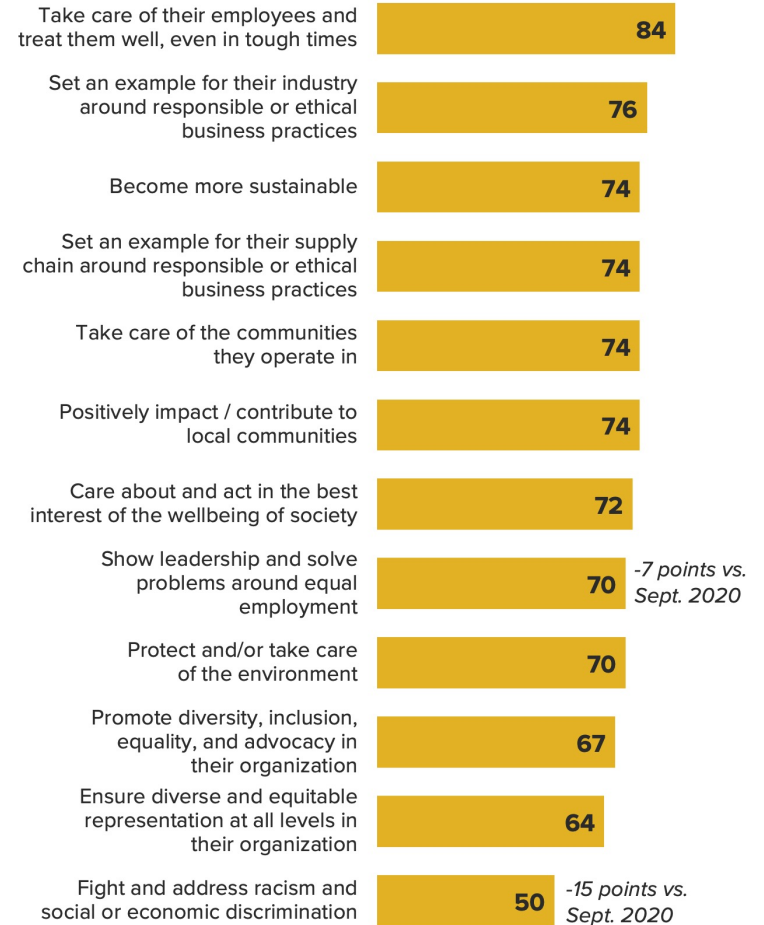


THE CHANGING ROLE OF COMPANIES

Most Americans believe corporate responsibilities span all stakeholders and extend beyond financials

Net agreement that companies have a **responsibility** to:

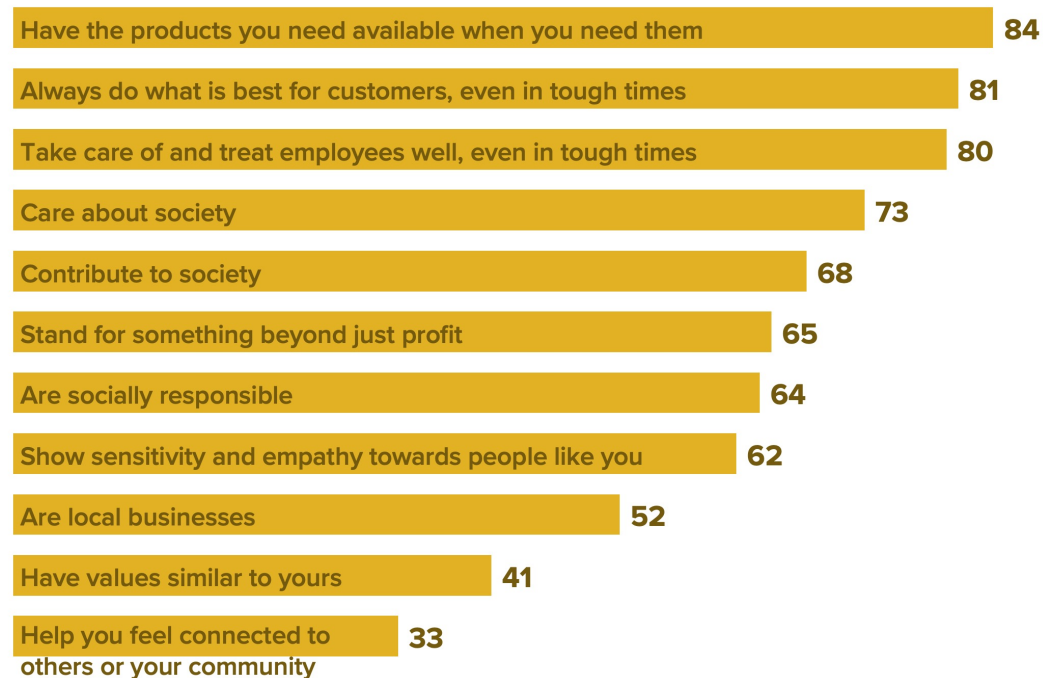
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THE CHANGING ROLE OF COMPANIES

And at least 68% of U.S. adults say a company's treatment of employees, customers and society more broadly plays an important role in their purchasing decisions...

Net share of adults who find it **important for companies they purchase from** to:

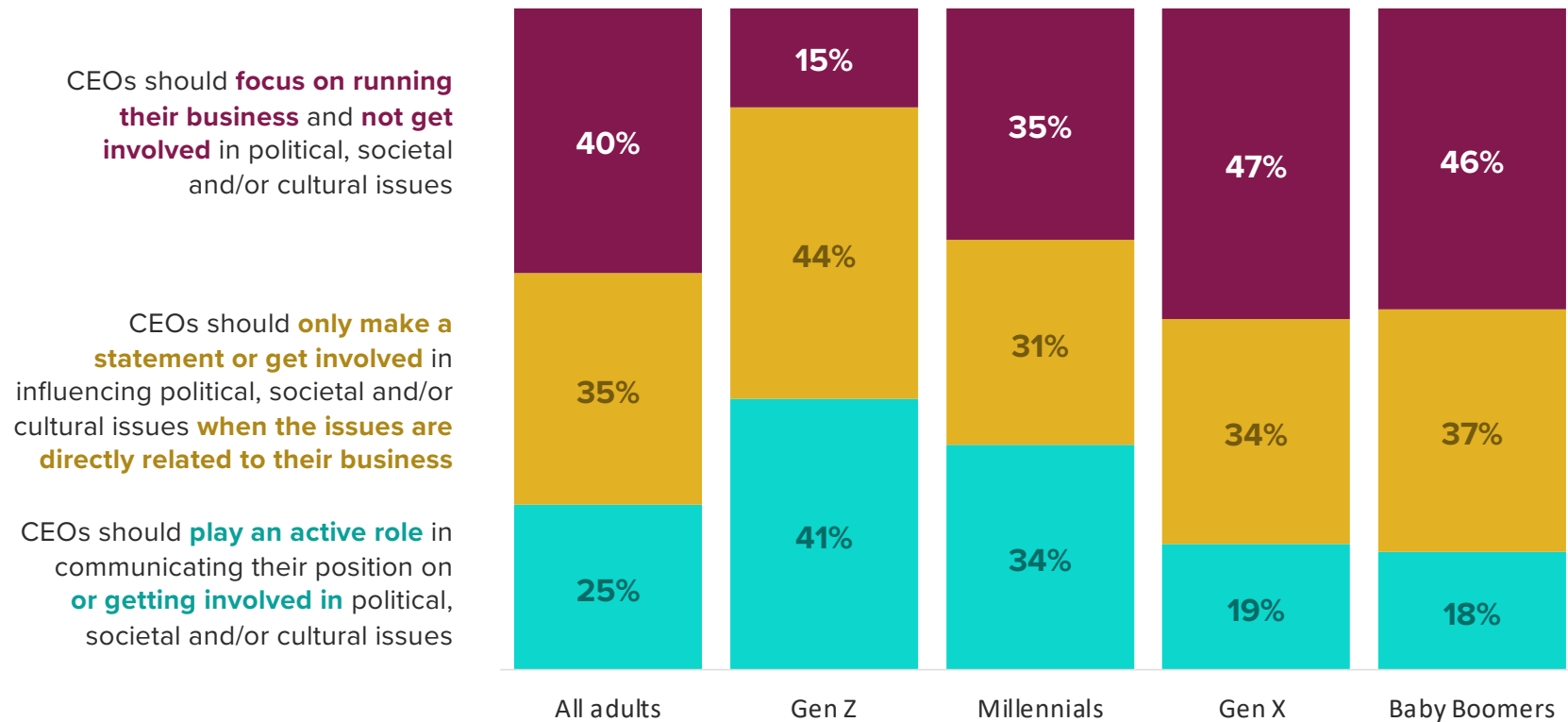


...though nuances exist across demographic audiences

- **Gen Z** adults consider **values alignment and community connections** notably more important
- **Women** find **standing for something other than profit**, being **socially responsible**, and showing **sensitivity toward people like them** significantly more important than men do
- **Lower-income earners** rate taking **care of and treating employees** well as particularly important
- **Being a local business** matters more to **rural** and **Midwestern** Americans

Americans increasingly believe CEOs should work to bring about political and cultural change

Share who said the following comes closest to their view:



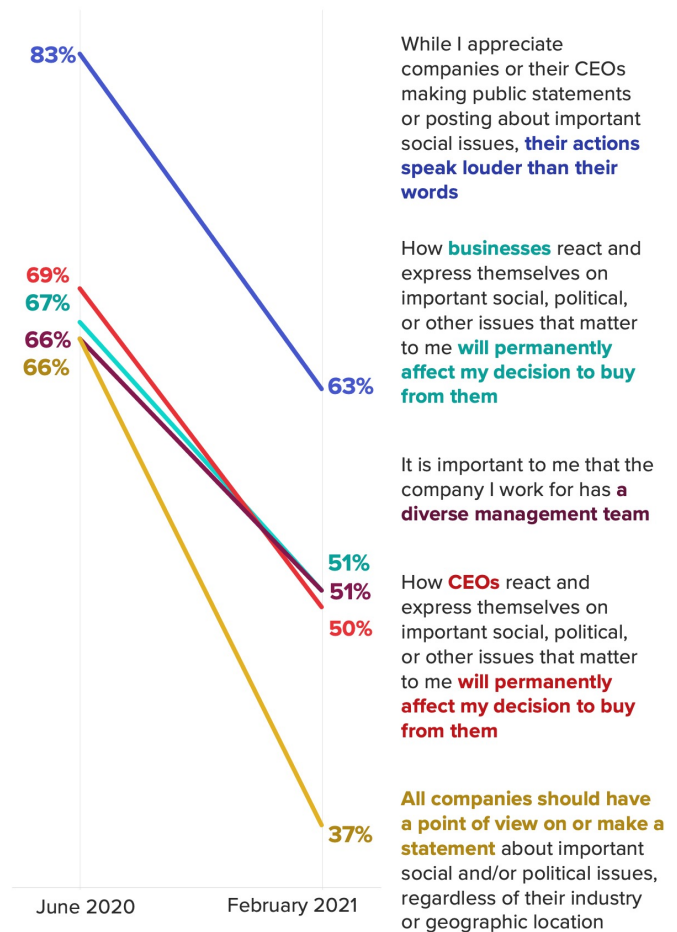
WHAT CONSUMERS WANT
COMPANIES TO SAY AND DO

THE CHANGING ROLE OF COMPANIES: SOCIAL ISSUES



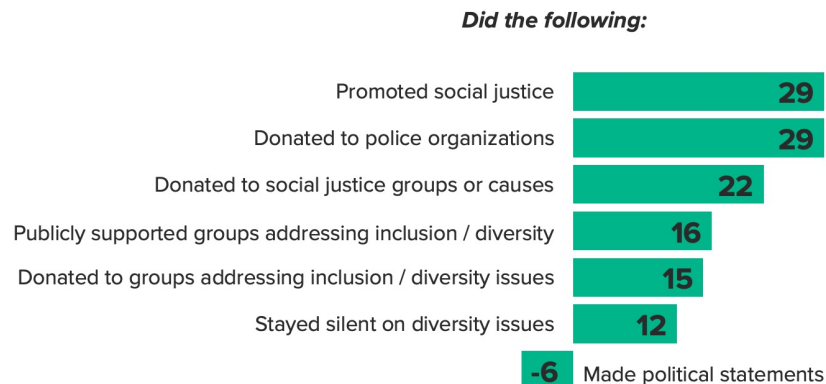
While sentiments around corporate and CEO activism have weakened, most still feel that actions speak louder than words on important social issues

Share of U.S. adults who agree that:

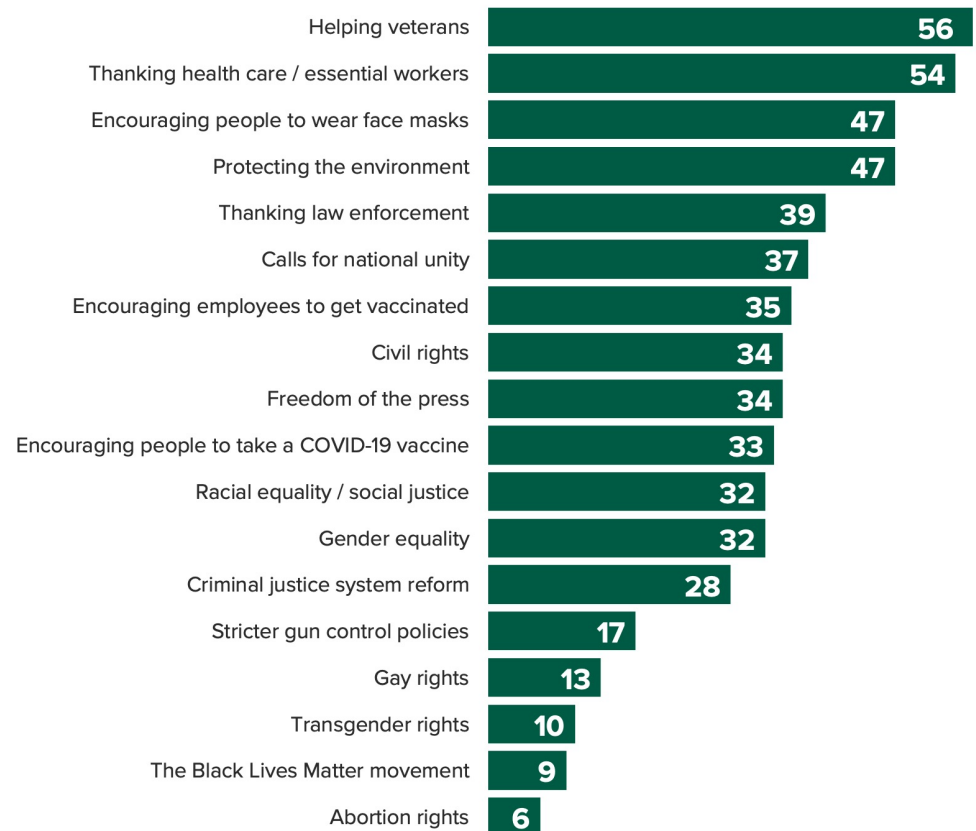


Over the past year, consumers have consistently rated various examples of corporate activism as playing a role in their purchasing decisions

Net increase in purchase likelihood if a company...



Advocated for or supported the following in their ads:

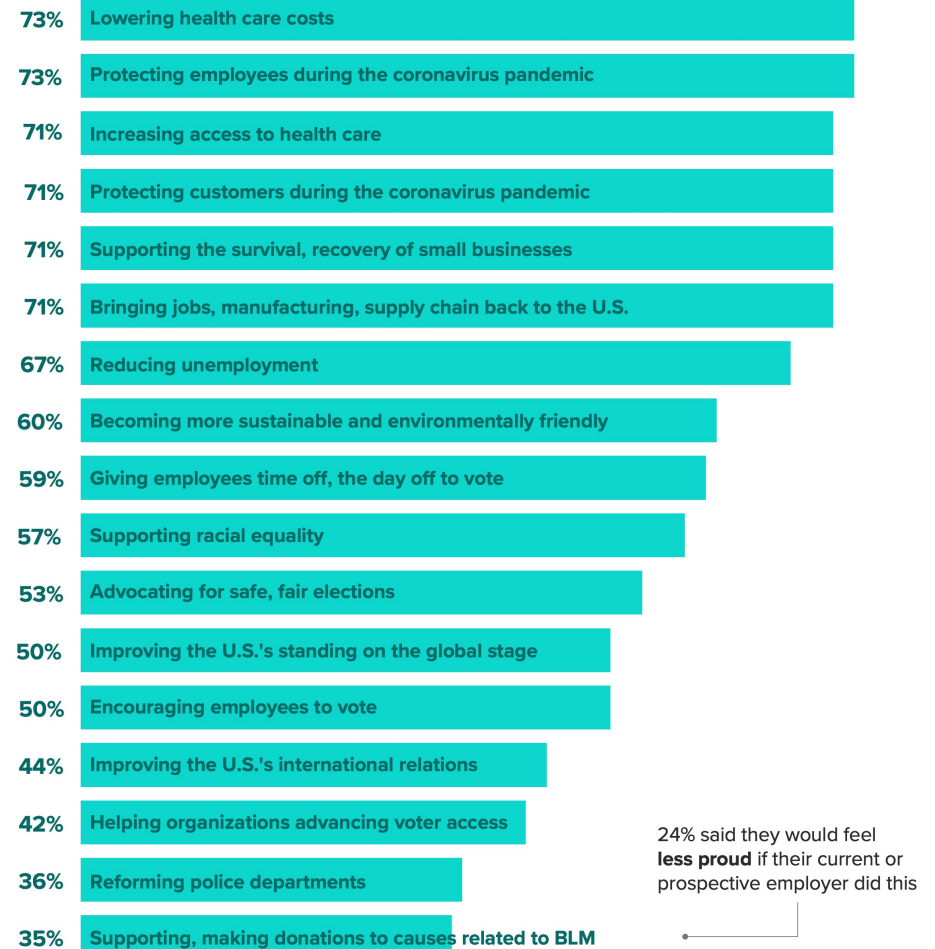


THE CHANGING ROLE OF COMPANIES: SOCIAL ISSUES

Such diversity in priorities also has implications for employer brands: health care- and stakeholder-related actions curry favor among most adults

Share who would feel **prouder to work for a company** / **would want to work for a company more** if it took action in favor of the following:

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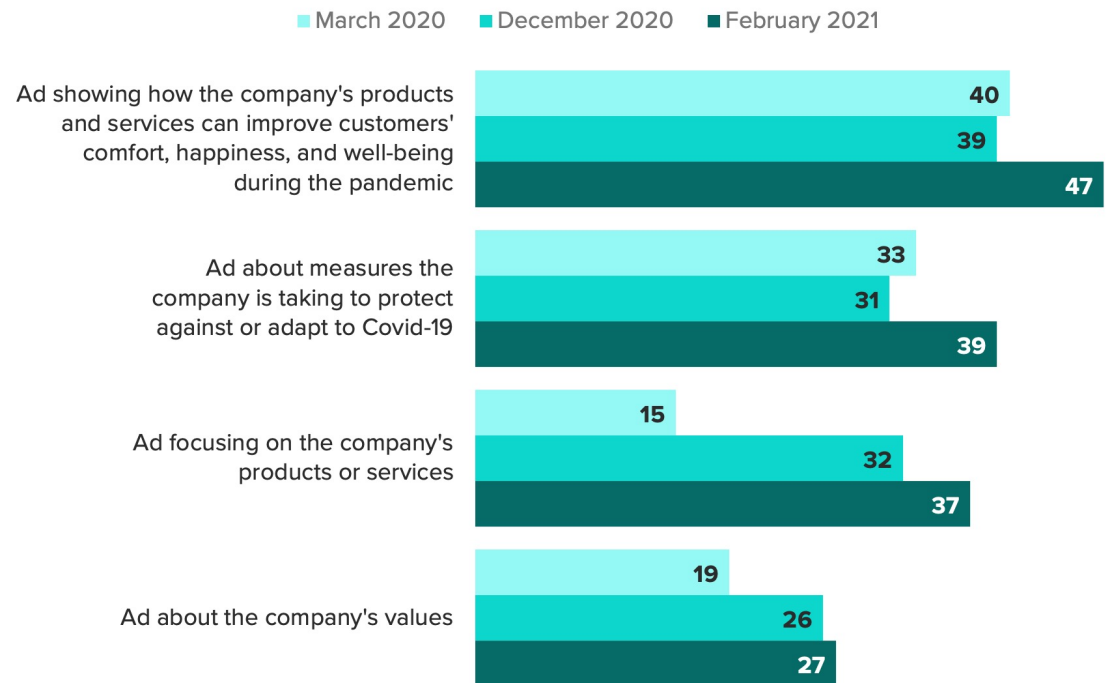
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WHAT CONSUMERS WANT
COMPANIES TO SAY AND DO

THE CHANGING ROLE OF COMPANIES: COMMUNICATING IN A PANDEMIC



While product- or service-oriented ads have seen the largest bump in likelihood to drive purchase since March 2020, ads about company values are also more likely to do so – up 42% since last year

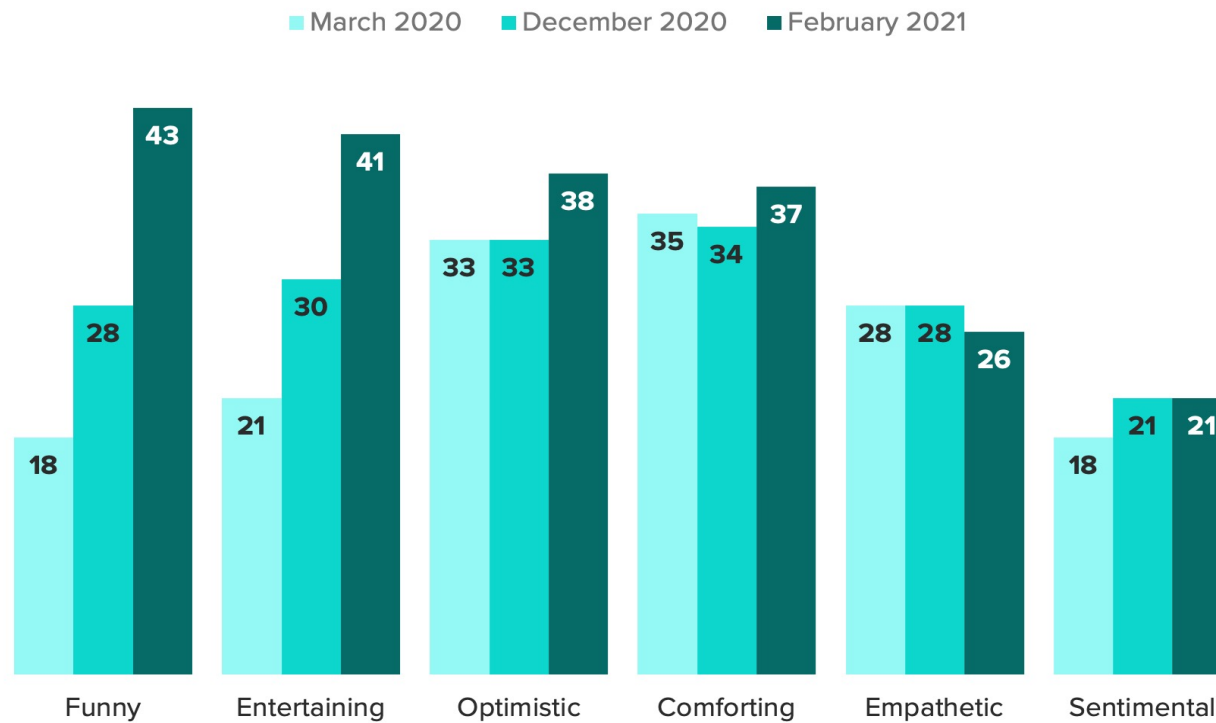
Net increase in likelihood to purchase
from a company with each ad type



THE CHANGING ROLE OF COMPANIES: COMMUNICATING IN A PANDEMIC

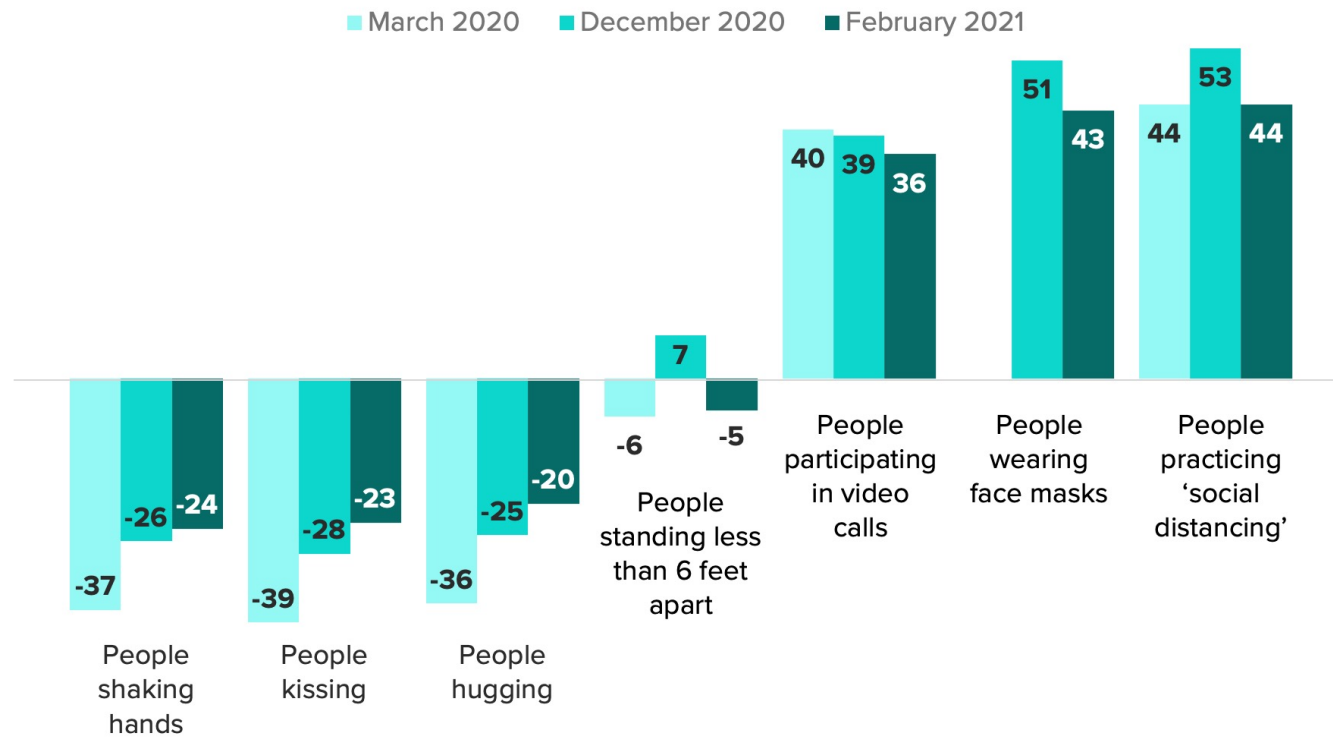
Funny, entertaining, and optimistic ads are significantly more welcome today than in the early days of the pandemic and even last December

Net increase in likelihood to purchase from a company with each ad type



Consumers are increasingly less put off by ads showing people violating Covid-19 health guidelines

Net increase in likelihood to purchase from a company whose ad showed the following



Striking the right balance between advocating for important issues, staying open to support employees' livelihood and communities' wellbeing, and delivering for shareholders will remain a challenge, with real implications for positioning, advertising, and strategy decisions



EXPANDING EXPECTATIONS

Consumers have elevated brands' role in society amid the pandemic, holding them more responsible for employee wellbeing, community livelihood and the protecting the environment, among other things.



ATTENTION & ACTIVISM

2020 left consumers **more conscious of their power to influence, discerning in their decisions and willing to vote with their wallets** — though the issues that different consumer groups are willing to rally around may continue to vary widely.



STAY CLOSE TO CONSUMERS

Relevant messaging, activations, and business strategies will be inspired by **memories of pre-pandemic times**, shaped by **events of the past year**, and dictated by shoppers' **evolving realities** as vaccinations and re-openings progress.



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