



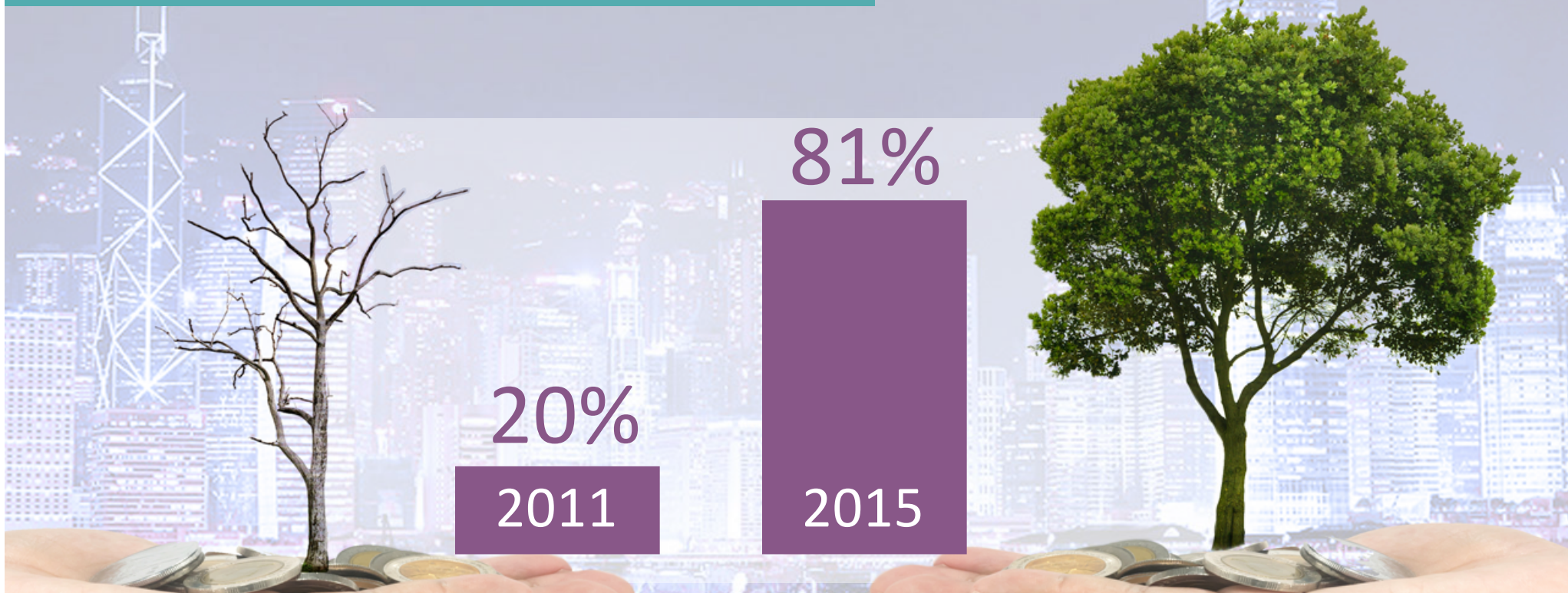
# TAKING A STAND

Brands, Social Good & Consumer Expectations

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# CSR Initiatives Increasingly Incorporated into Business Strategy

% S&P 500 PUBLISHING CSR REPORT

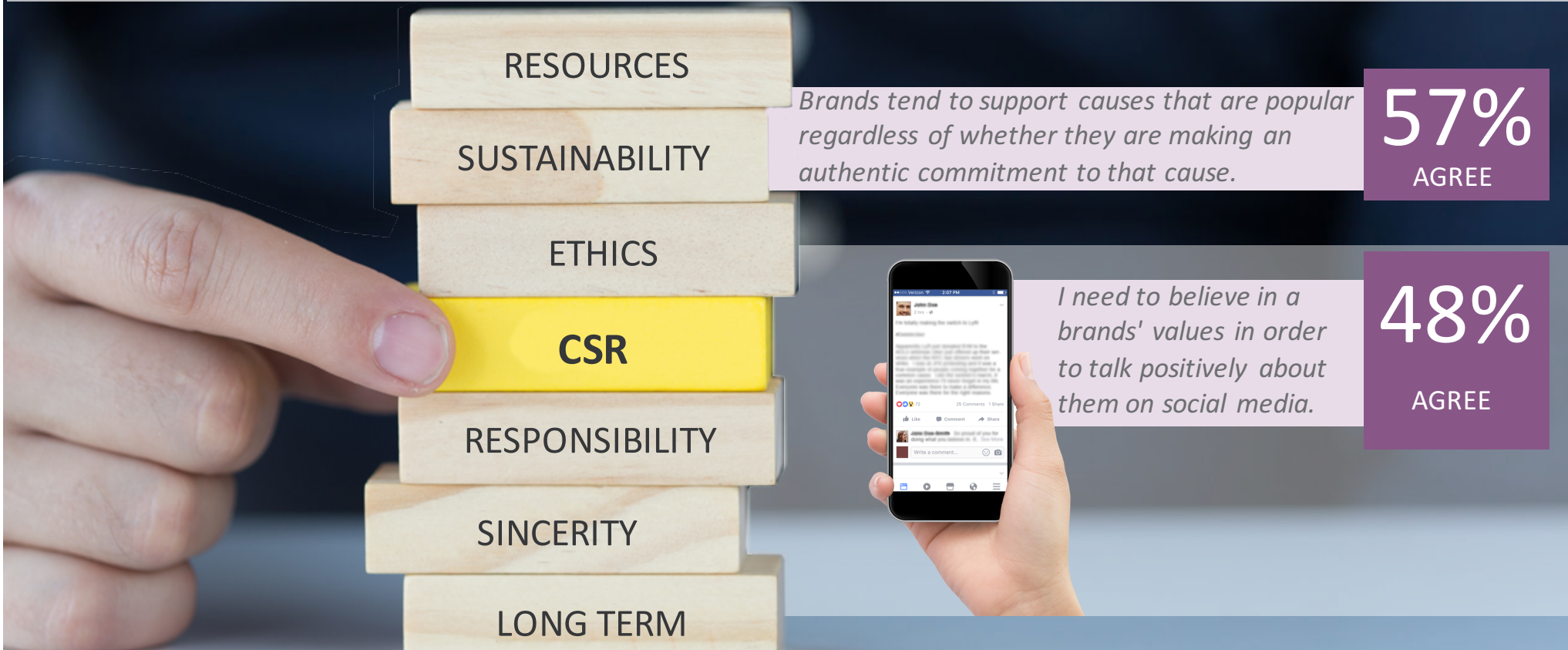


Source: Governance & Accountability Institute, Inc. Flash Report

<https://globenewswire.com/news-release/2016/03/15/819994/0/en/FLASH-REPORT-81-of-the-S-P-500-Index-Companies-Published-Corporate-Sustainability-Reports-in-2015.html>

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# Authenticity and Value Alignment Matter



Source: YouGov Omnibus January 10-11, 2017 among 1,081 members of the U.S. General Population  
To what extent do you agree with the following statements?

Brands tend to support causes that are popular regardless of whether they are making an authentic commitment to that cause.  
I need to believe in a brands' values in order to talk positively about them on social media.

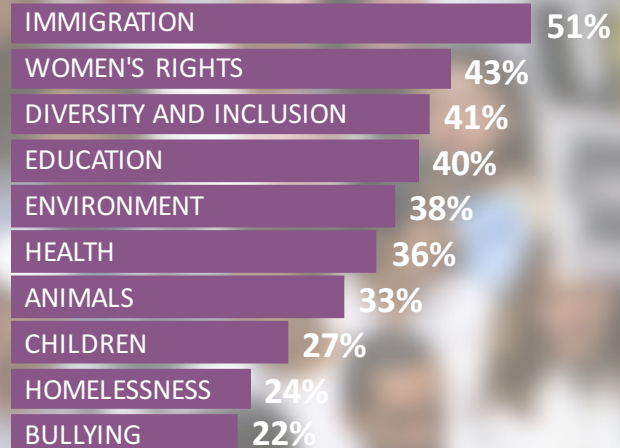
# Current Climate Creating Strong Advocates for Variety of Causes

## SUPPORT FOR CAUSE IN PAST 3 MONTHS

% Increased Support for Cause

31%

## SPECIFIC CAUSES SUPPORTED



Top 10 shown

Among those with increased support for social causes

Source: YouGov Omnibus February 5 – 6, 2017 among 1,078 members of the U.S. General Population  
Over the past 3 months, how has your level of support for social causes changed, if at all?

You mentioned you have increased your level of support for social causes over the past 3 months. Which causes in particular have received more of your support? (n=355)

# Events & Messages Viewed Through Different Lens

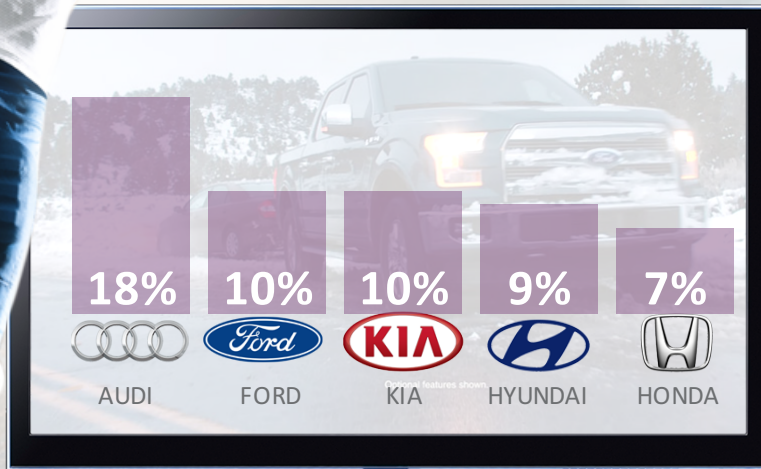


## PRESENCE OF POLITICAL STATEMENT

### LADY GAGA'S HALFTIME SHOW



### AUTOMOTIVE SUPER BOWL ADS % THINK HAD POLITICAL MESSAGE



63%

No, I don't think it had a political message

37%

Yes, I think it had a political message

\*Among those who saw it  
Source: YouGov Omnibus February 5 - 6, 2017 among 1078 members of the U.S. General Population  
Did you think Lady Gaga's Super Bowl half-time show had a political message?  
Of the automotive ads that aired during the Super Bowl, which of the following, if any, had a political statement?

# Is There New Risk In "Doing Good"?

IS DOING ENVIRONMENTAL GOOD STILL GOOD FOR BUSINESS?

NO

46%

YES

54%

42%



DEMOCRATS

58%

44%



REPUBLICANS

56%

Source: YouGov Omnibus February 5 - 6, 2017 among 1,078 members of the U.S. General Population  
For the past several years, companies have come around to the idea that doing good toward the environment is good for business, is this still true in 2017?

# Varying Generational Expectations for Brands

## BRANDS TAKING A STAND ON SOCIAL ISSUES



AGE 18-34



AGE 35-54



AGE 55+

Source: YouGov Omnibus January 6-9, 2017 among 1,153 members of the U.S. General Population  
Thinking about when brands take a stand concerning issues in society..In general, which ONE of the following statements BEST describes your opinion?

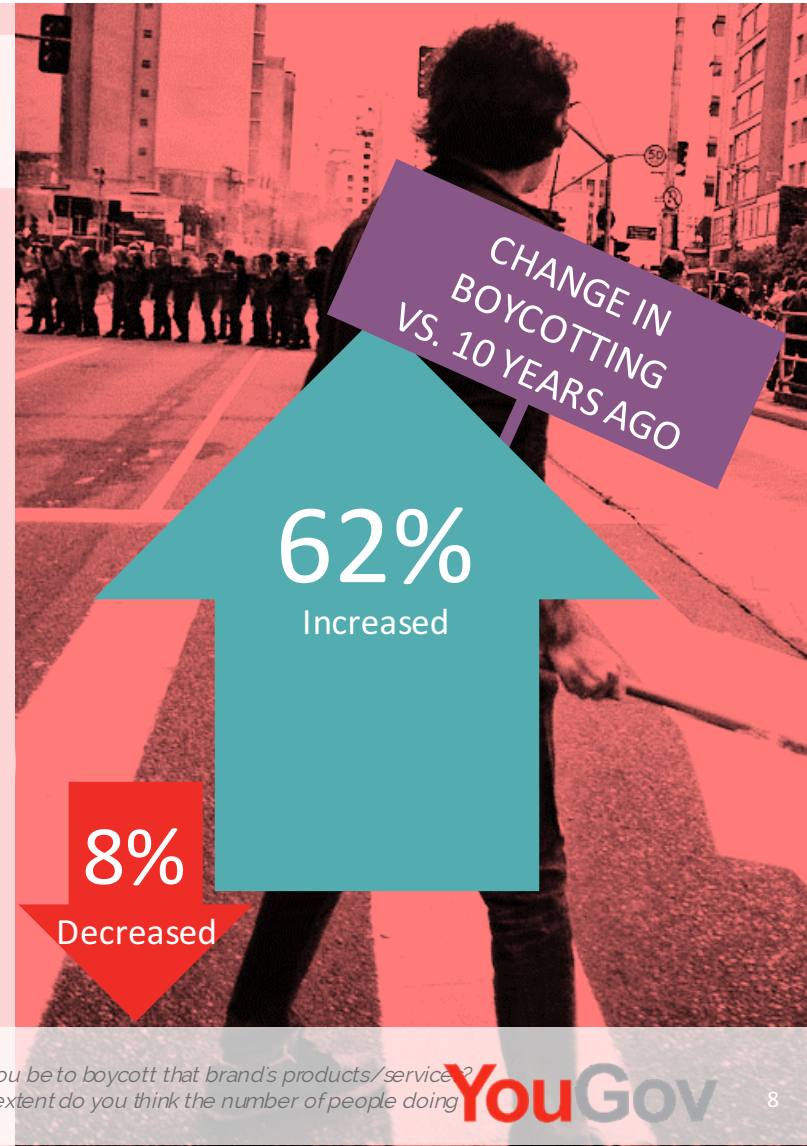
## Majority Willing to Boycott

And tendency toward this behavior is perceived to have increased over time



VERY/SOMEWHAT LIKELY TO  
Boycott brand if  
disagree with stance

59%



Source: YouGov Omnibus January 6-9, 2017 among 1,153 members of the U.S. General Population

Please imagine that a brand took a stand on an issue in society that you strongly disagreed with..How likely, if at all, would you be to boycott that brand's products/service?  
Thinking about how many people boycott brands due to stands on political issues now compared to 10 years ago..To what extent do you think the number of people doing this has increased or decreased, or has it stayed about the same?

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# Buying Decisions Based on Brand Values Alignment

NOT PURCHASED BECAUSE DON'T BELIEVE IN WHAT COMPANY STANDS FOR



58%  
DIDN'T BUY

Source: YouGov Omnibus January 10-11, 2017 among 1,081 members of the U.S. General Population  
Have you ever NOT bought something because you don't believe in what the company stands for?



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