

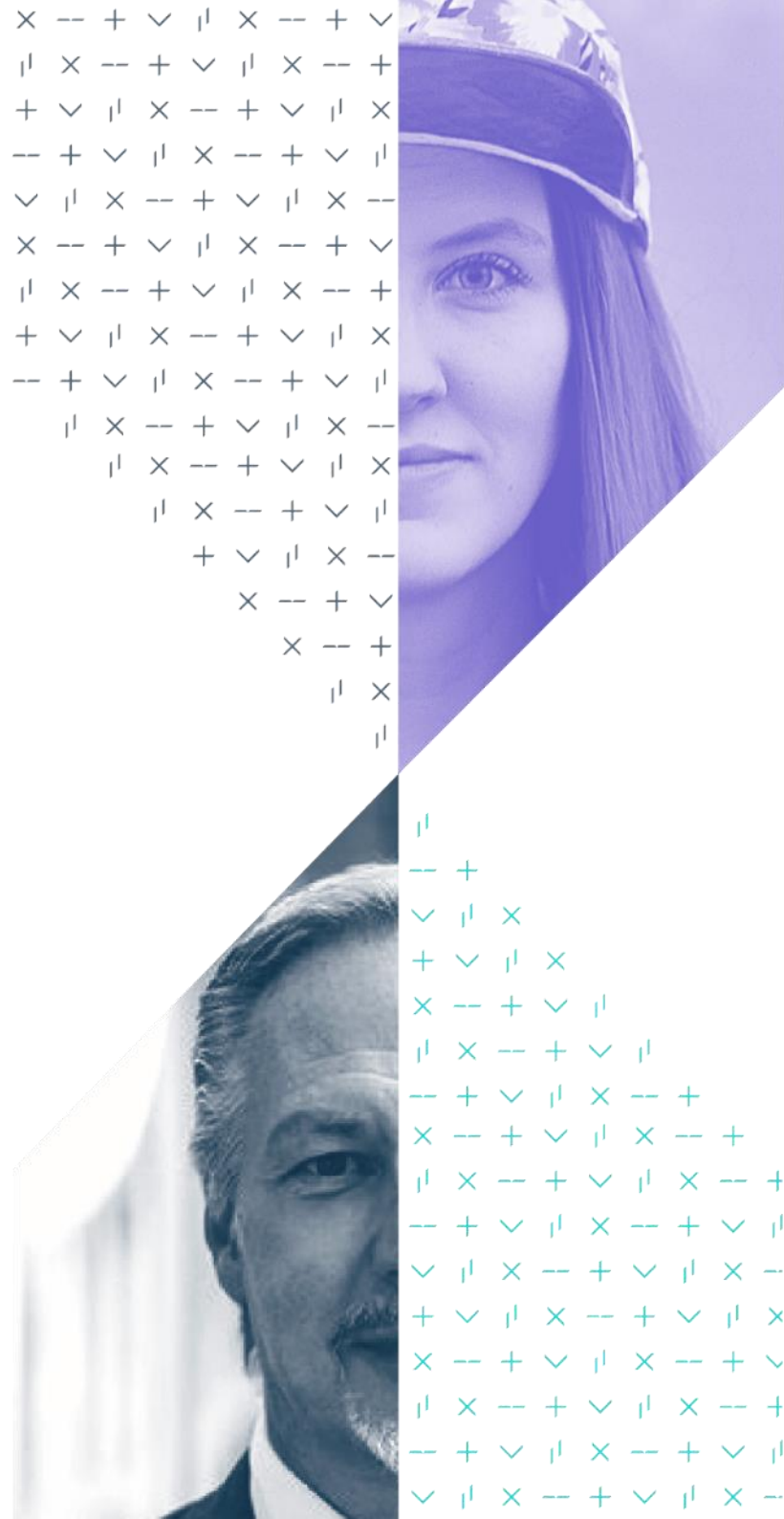
Perspectives
2017

The Five G's that Define the World

Generations, Gender,
Geography, Global Cities,
and Graduation

PERSPECTIVES

BRUNSWICK






Adults in 26 markets

42,956 interviews

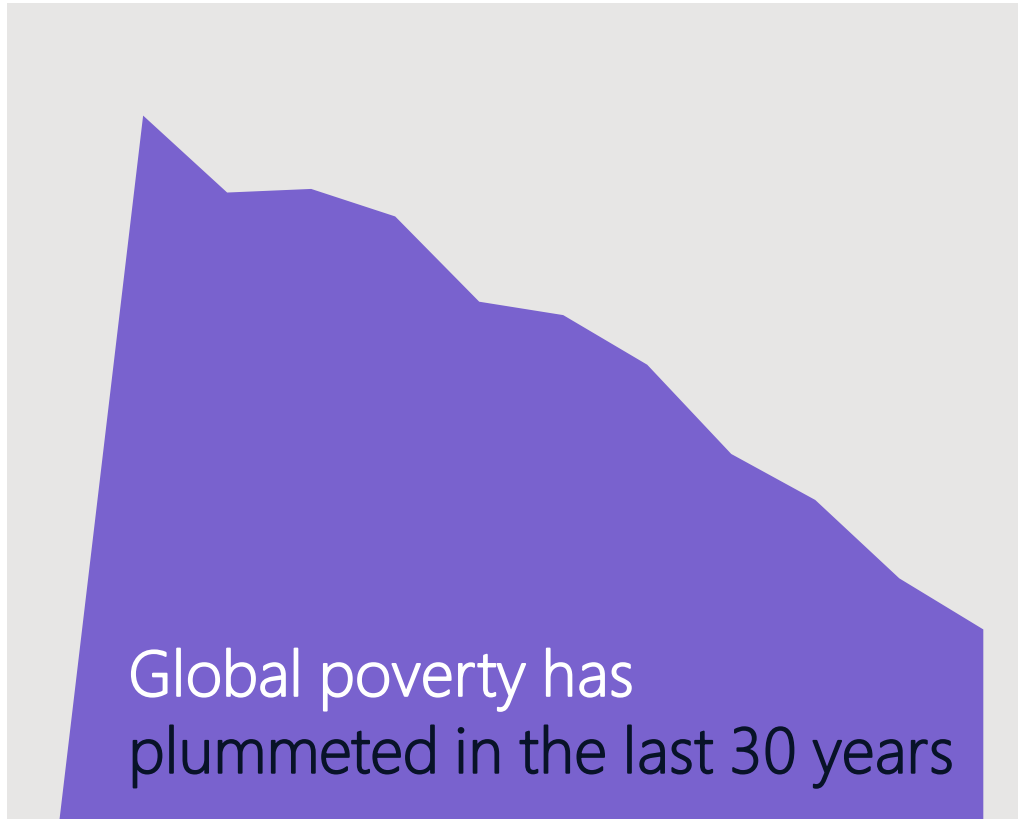
Online data collection in
25 languages



How do we
think about the
world today?

Best of times, worst of times?

Emerging Market Success



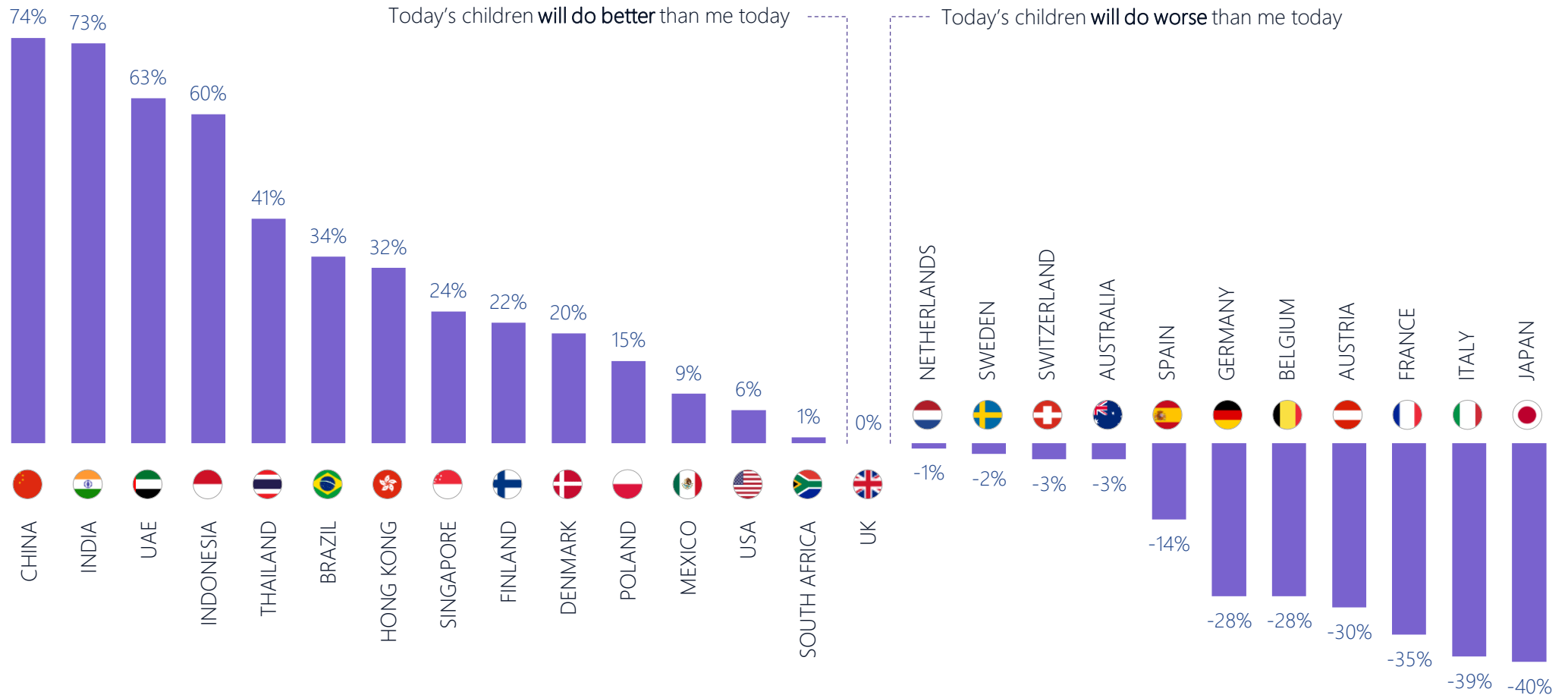
1981 1984 1987 1990 1993 1996 1999 2002 2005 2008 2011 2013

Frustration and unrest in many developed nations



It's the best of times, it's the worst of times

Will children be better or worse off?

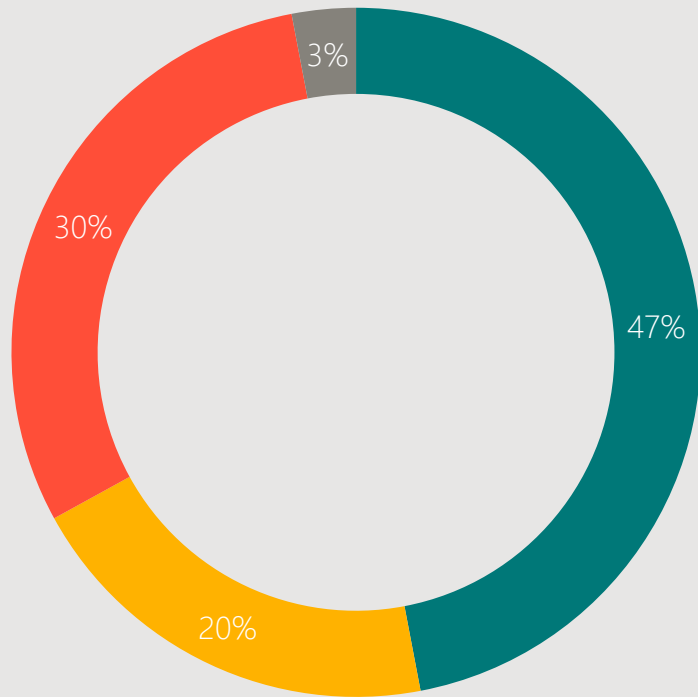


When today's children in your country are your age, how will they be doing financially compared to where you are right now? Would you say better, worse or about the same?

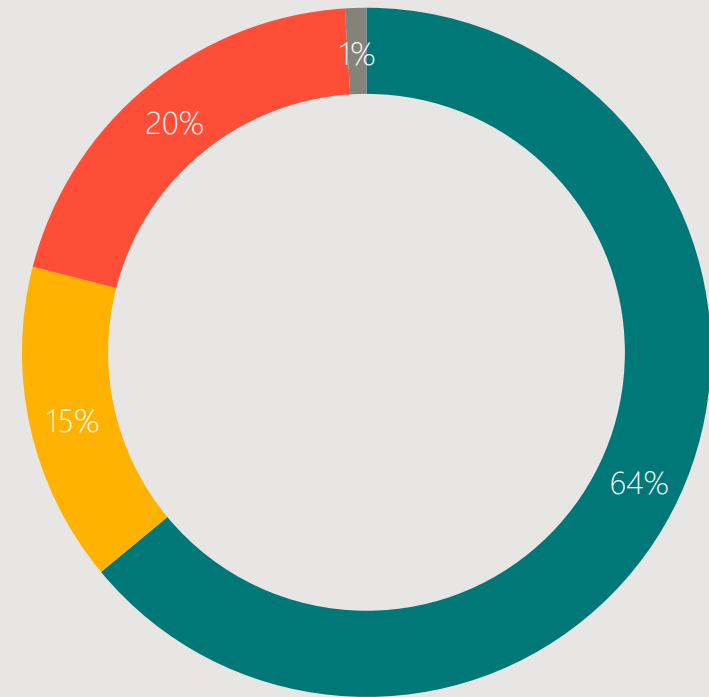
It's the best of times, it's the worst of times

Are we better off than our parents were?

Developed nations



Emerging nations



■ Better ■ About the same ■ Worse ■ Don't know

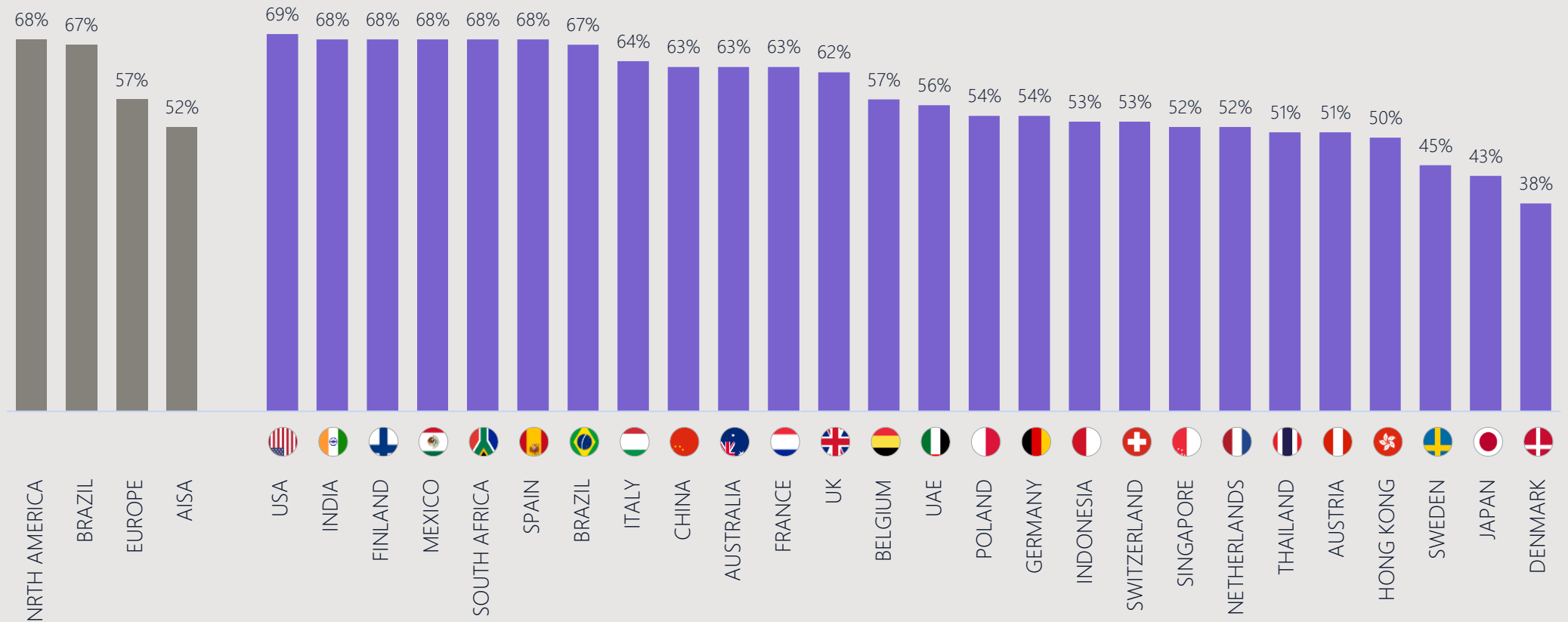
How would you rate your own personal financial situation compared to your parents when they were your age?
Would you say it's better, worse or about the same?

Business has
some real
image
problems



Are we listening? Do we understand?

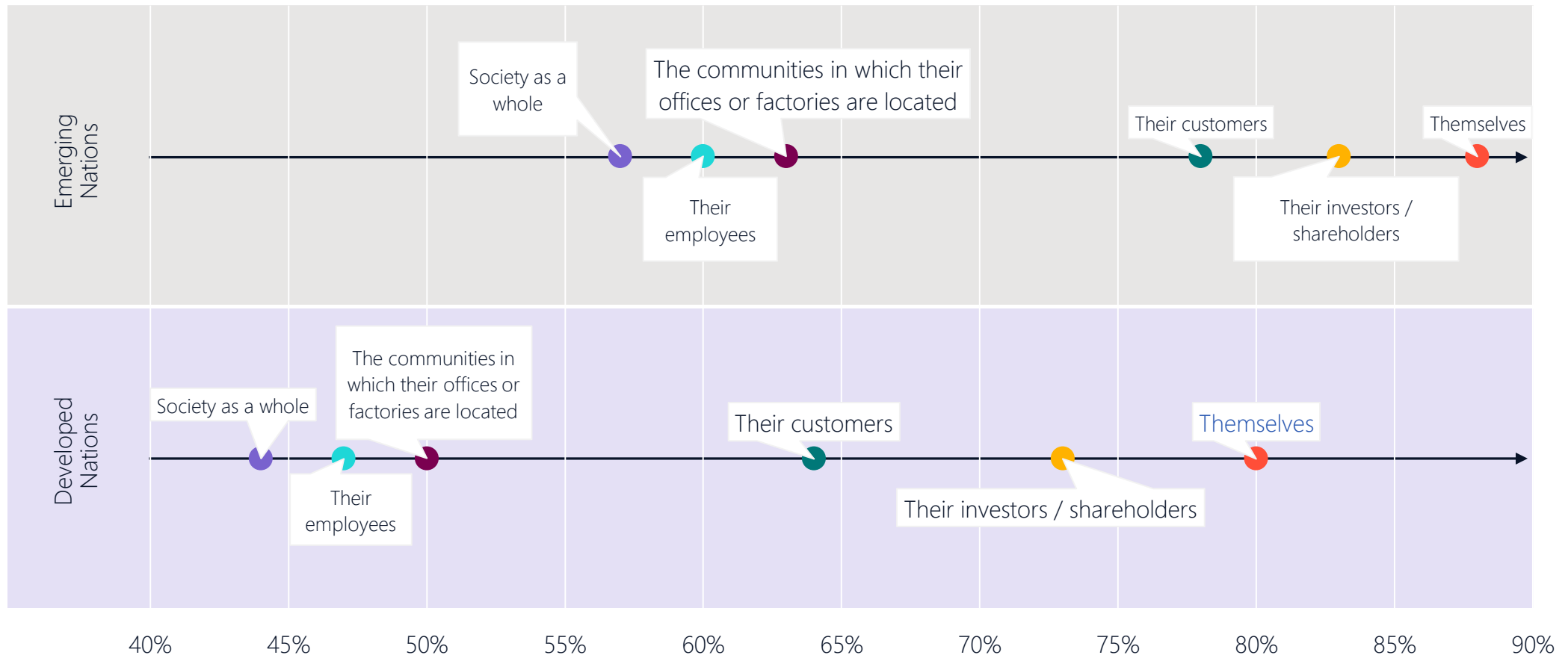
Business Leaders DO NOT understand challenges I face in my life
(% Agree with Statement)



To what extent do you agree or disagree with the following statements?
Business leaders in my country do not really understand the challenges I face in my life

People question businesses' motives...

Leaders of large business in my country serve...



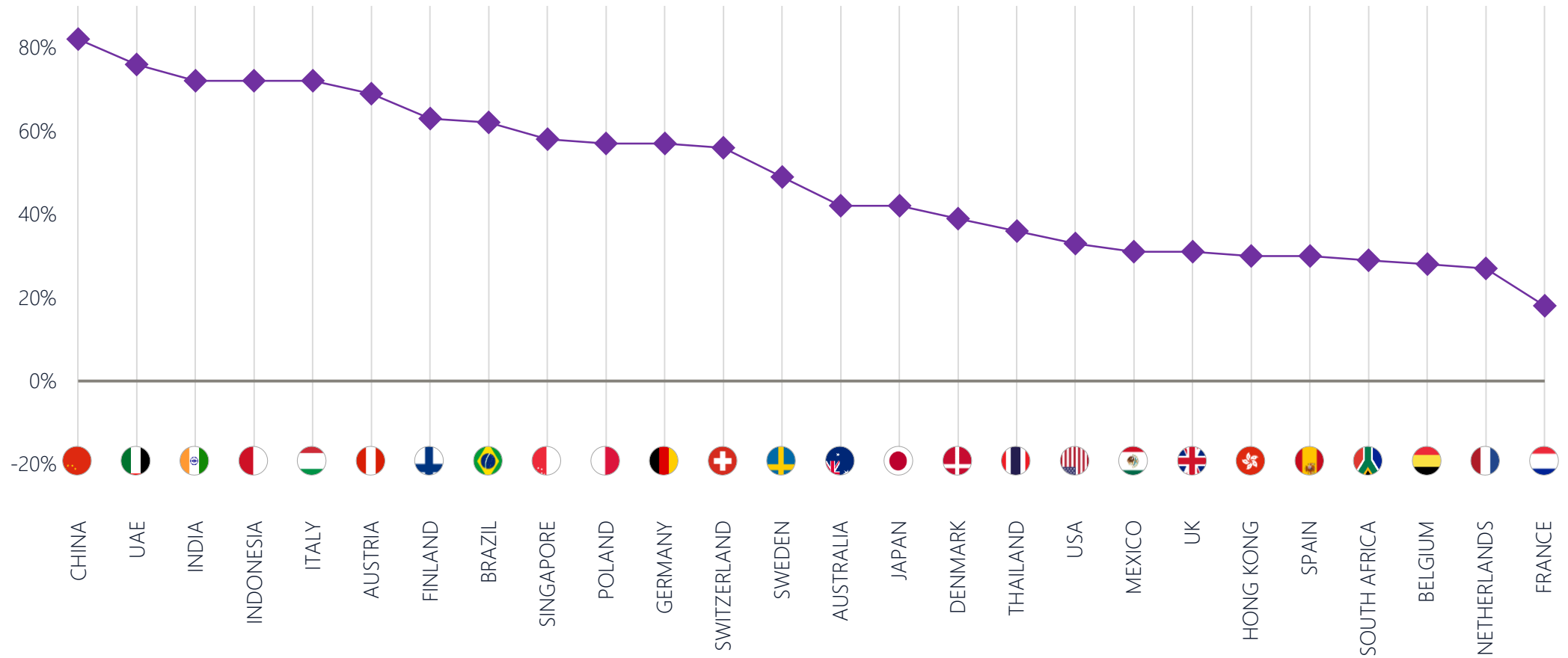
How well, if at all, do you think the leaders of the largest businesses in your country serve the following entities?

Business can
make a
difference



Business success perceived as beneficial

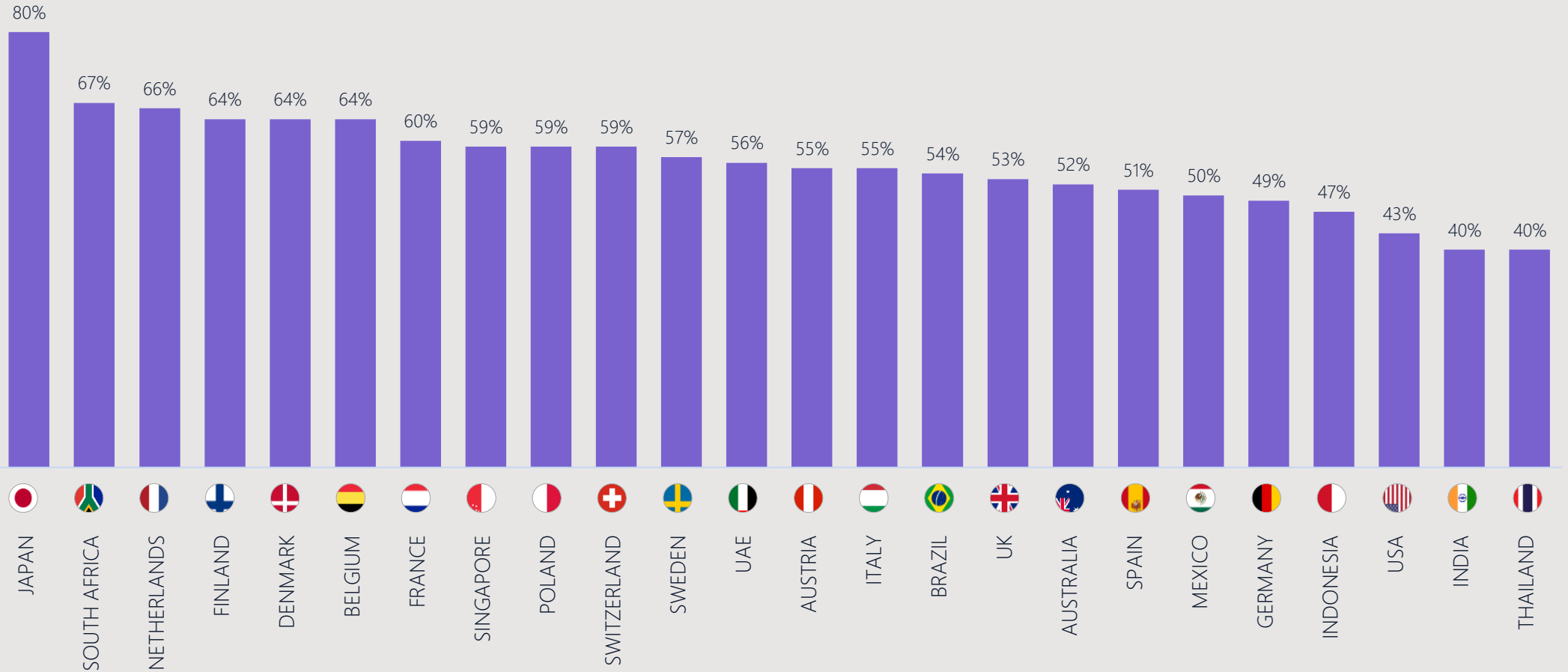
When businesses do well, everyone benefits
(% Net Agreement)



To what extent do you agree or disagree with the following statements?

Global agreement that business can provide global solutions

Businesses CAN provide solutions to the major challenges
(% Net Agreement)



Which TWO of the following institutions is most effective TODAY in providing solutions to the major challenges facing your country?

And that's
the story at
the national
level





But what if we
went deeper?

Five G's World

Moving beyond
nation-states and
markets



GENERATION



GENDER



GRADUATION



GEOGRAPHY



GLOBAL CITIES

The Five G's World

48 Faces of the World

What if we look at the world across the five dimensions?
Who are these people and how do they see the world?



We need to understand people across nations and within nations



Stanley

Male 50+ No College Degree
Developed Market Small Town

▼ My tomorrow

Future better for children -24%

▼ My country

Economy changing for better -13%

Society changing for better -38%

Government changing for better -39%

▼ My World

View of Globalization -10%

View of Capitalism -14%



Sofia

Female 18-29 College Educated
Emerging Market Large City

▲ My tomorrow

Future better for children +49%

▲ My country

Economy changing for better +20%

Society changing for better +14%

Government changing for better +8%

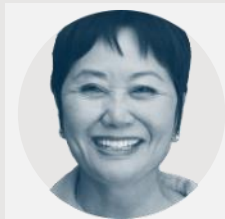
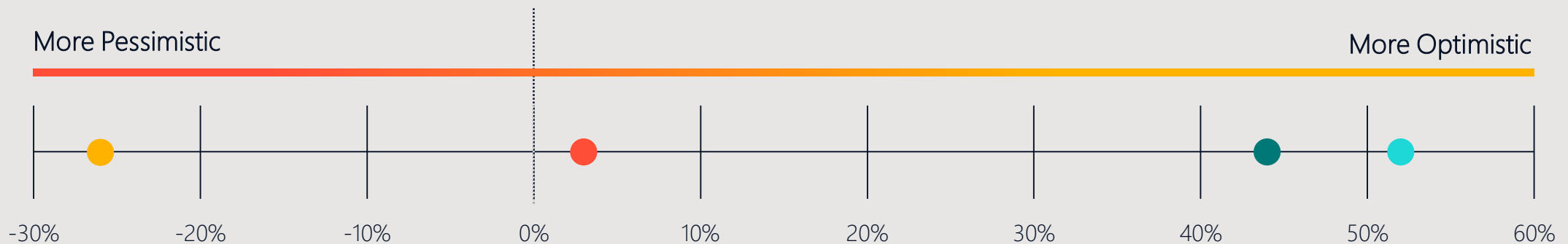
▲ My World

View of Globalization +64%

View of Capitalism +28%

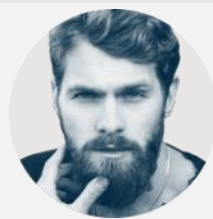
We'd learn that hope and fear vary widely by our audience

Will my children be better or worse off?
(% Net Optimism)



Penny

Female
50+
No College Degree
Developed Market
Town



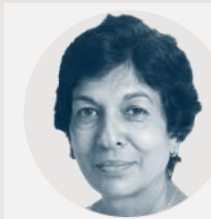
Tomás

Male
30-49
College Degree
Developed Market
Large City



Miguel

Male
18-29
College Degree
Emerging Market
Large City



Farah

Female
50+
No College Degree
Emerging Market
Large City

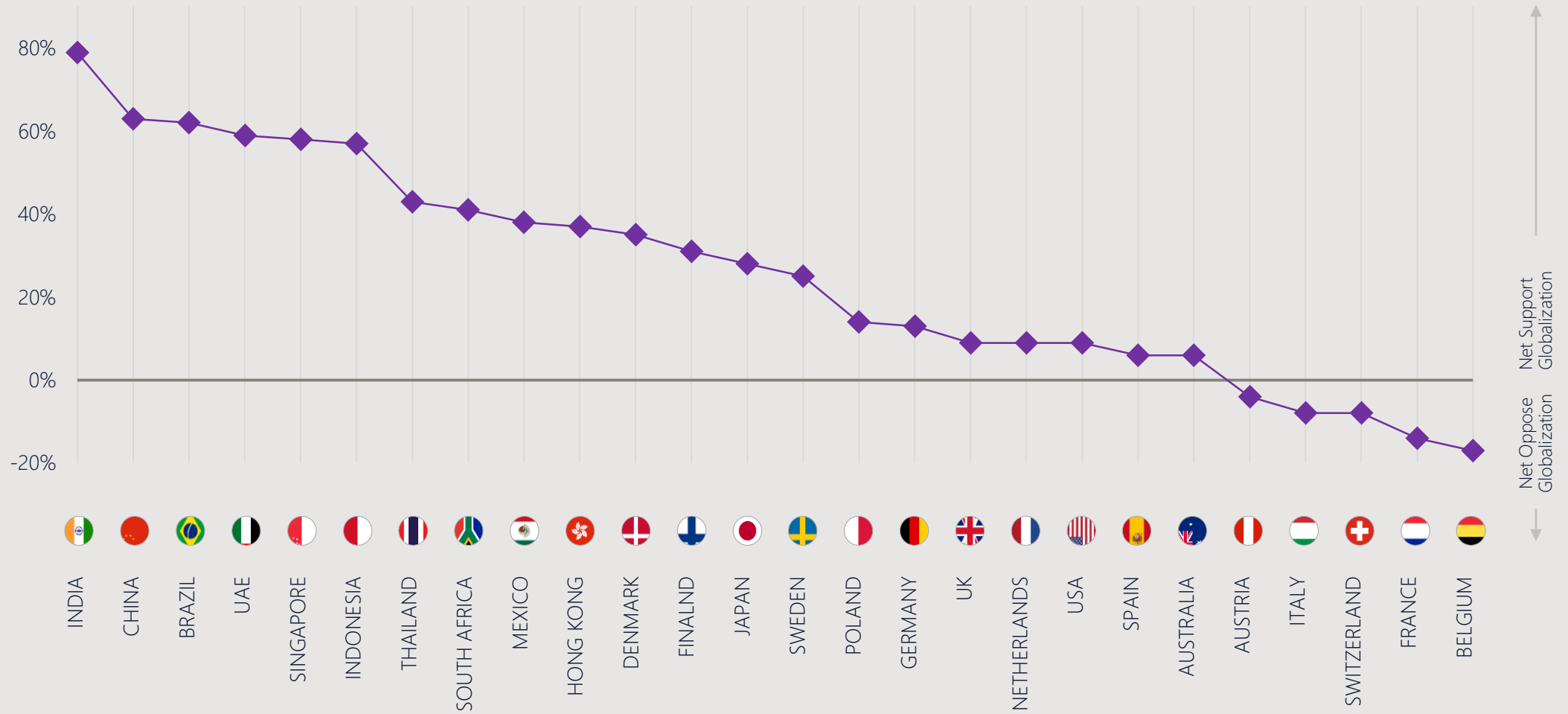
When today's children in your country are your age, how will they be doing financially compared to where you are right now? Would you say better, worse or about the same?

We'd learn that perspectives on globalization are more about the mega-city than the nation state



Attitudes towards globalization

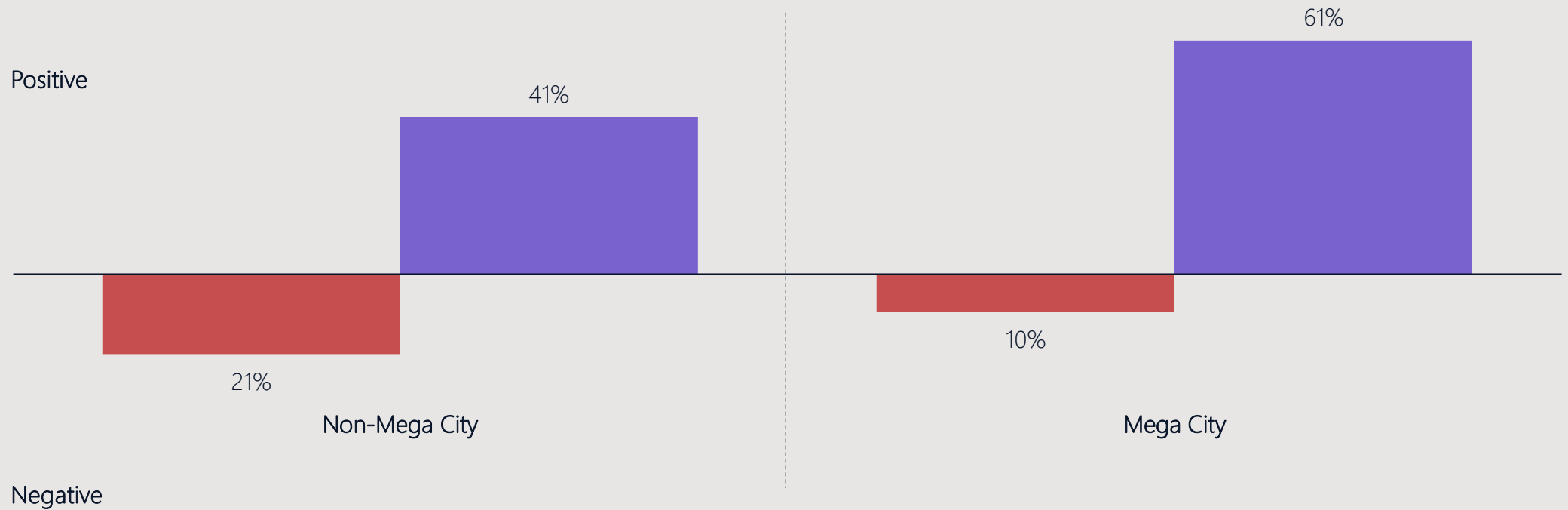
Net Support for Globalization



To what extent would you say you have a positive or negative view of each of the following?

Instead, it's about global mega-cities and everyone else

Views of Globalization



To what extent would you say you have a positive or negative view of each of the following?

Business needs to speak to Stanley





But it also needs to
speak to these people

Consider Sofia, Petr and Penny

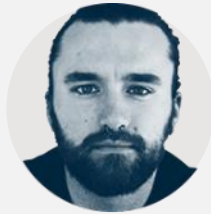


Sofia

Female 18-29 College
Educated
Emerging Market Large City

People like me

Employed Full Time	65%
Children	42%
Facebook	73%
WhatsApp	59%
Twitter	31%



Petr

Male 30-49 No College
Degree Developed
Market Town

People like me

Employed Full Time	63%
Children	54%
Facebook	72%
WhatsApp	43%
Twitter	22%



Penny

Female 50+ No College
Degree Developed
Market Town

People like me

Employed Full Time	12%
Children	82%
Facebook	66%
WhatsApp	27%
Twitter	9%



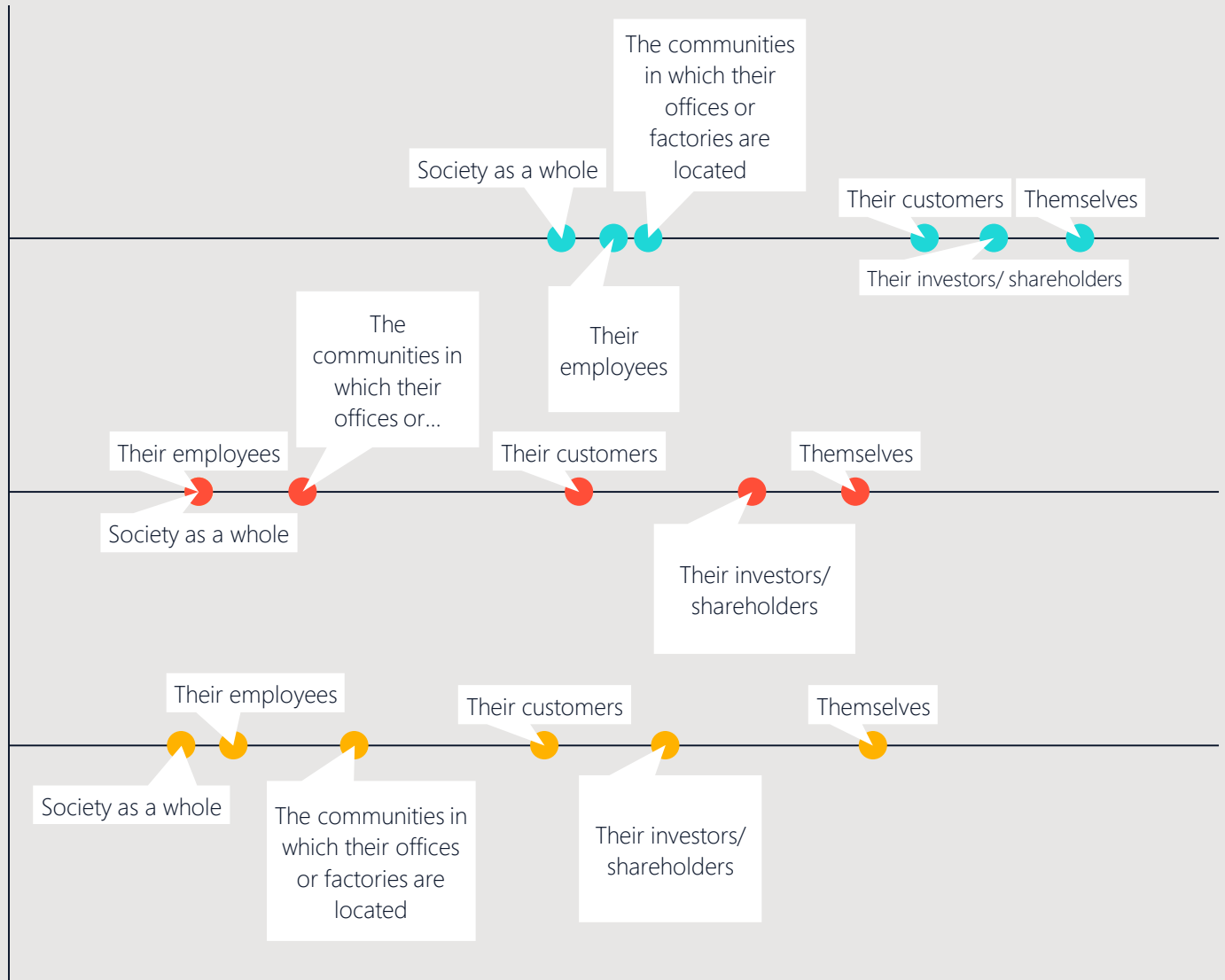
Sofia, Petr and Penny doubt business leaders' motives



Sofia
 Female 18-29 College Educated
 Emerging Market Large City

Petr
 Male 30-49 No College Degree
 Developed Market Town

Penny
 Female 50+ No College Degree
 Developed Market Town



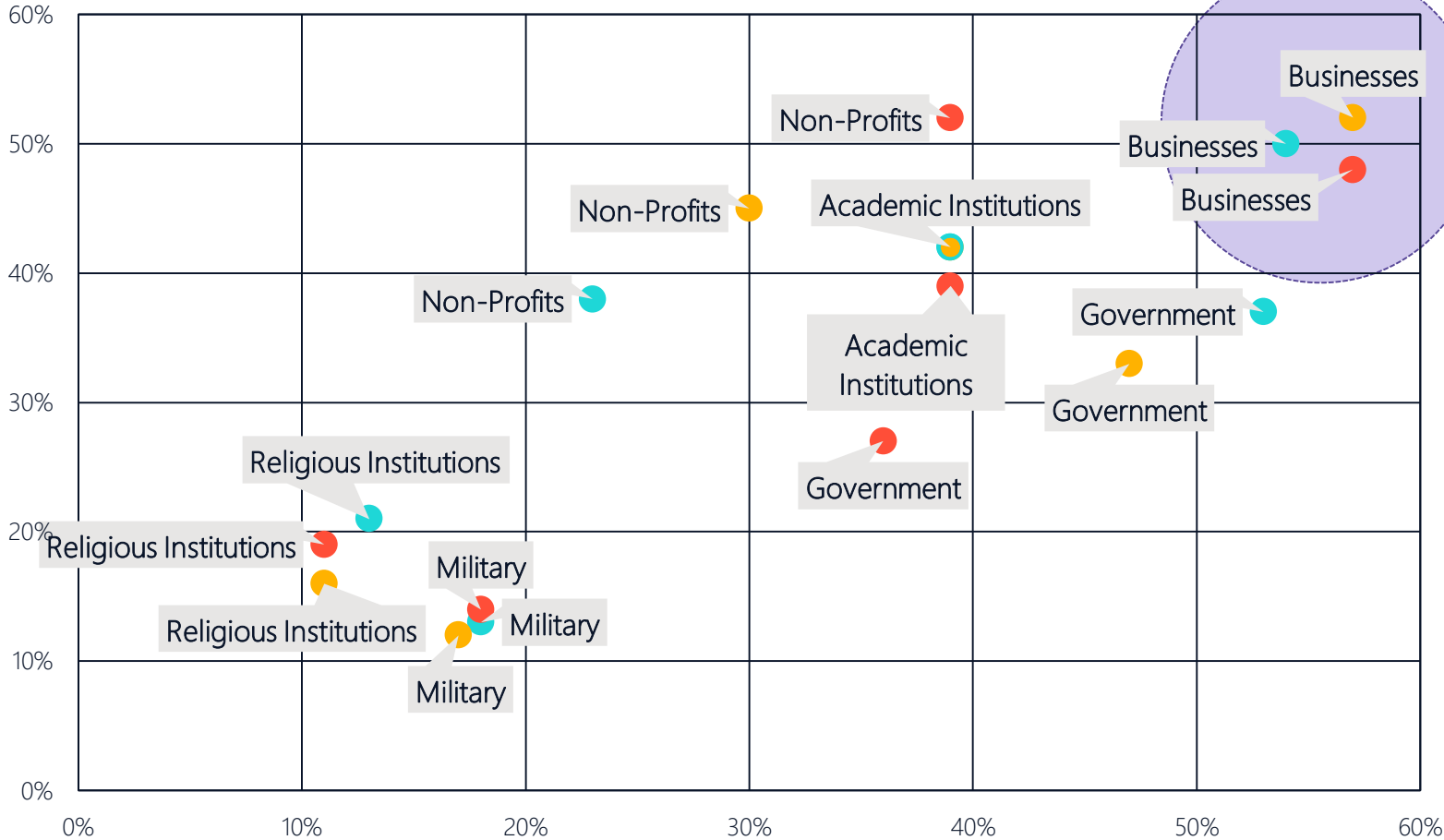
How well, if at all, do you think the leaders of the largest businesses in your country serve the following entities?

Business gets
things done



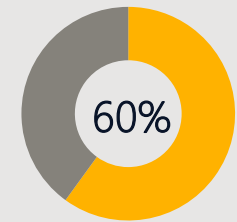
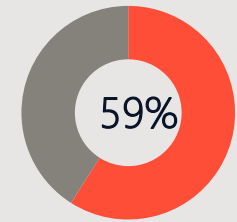
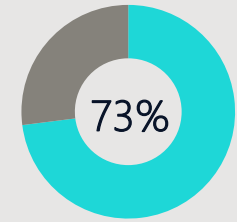
Pessimists and optimists turn to business

Represents People Like Me



Providing solutions

When businesses in my country do well, the entire country benefits

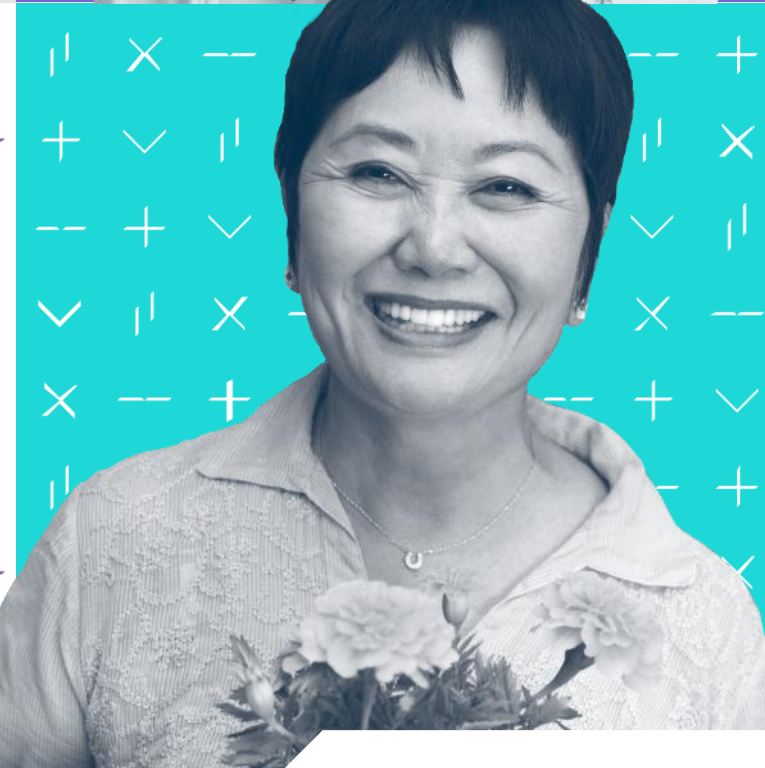


- Optimists
- Pessimists
- Constants

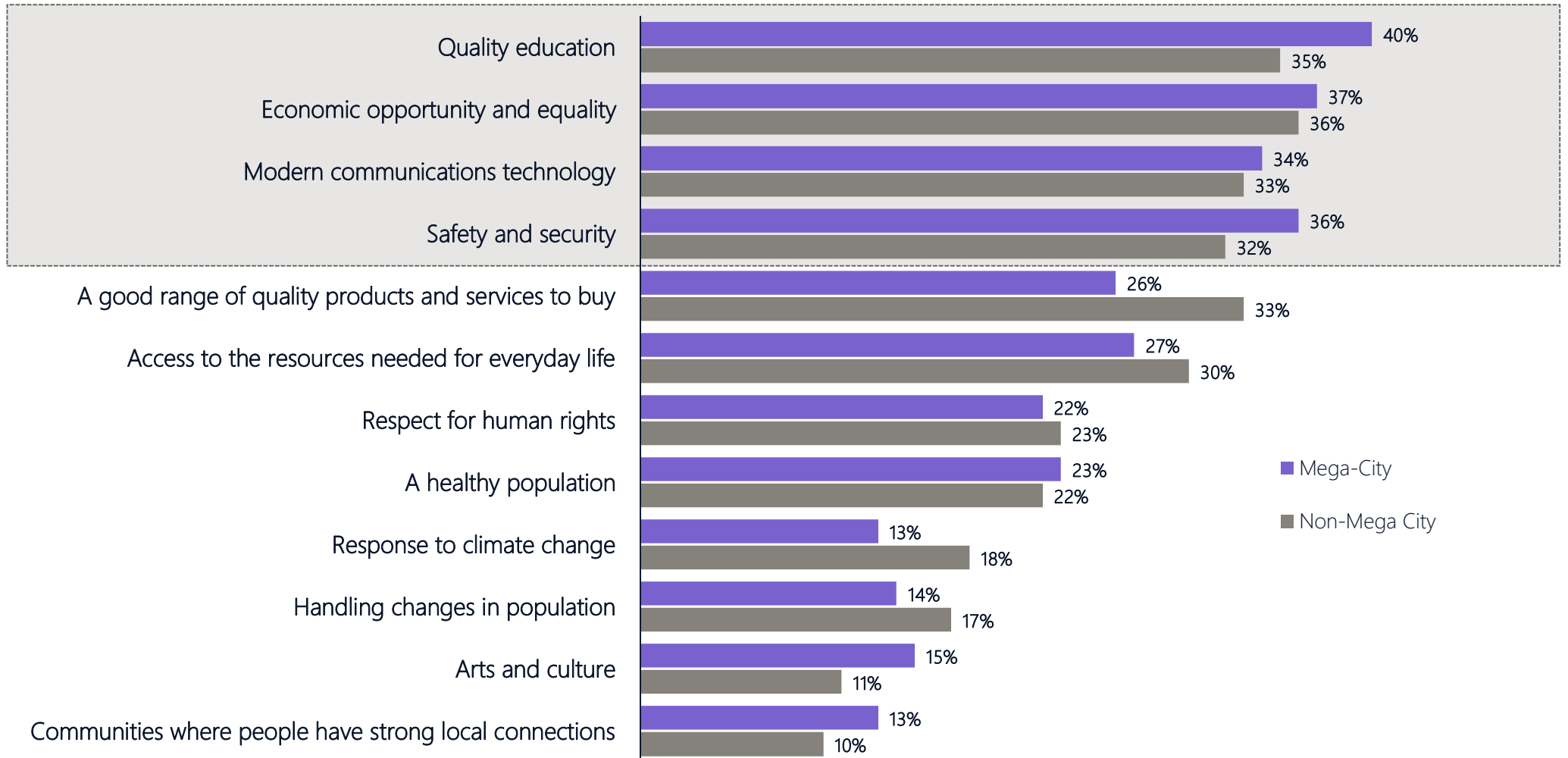
Which TWO of the following institutions is most effective TODAY in providing solutions to the major challenges facing your country?
 And which TWO of the following institutions do you believe most represents the interests of people like you?
 To what extent do you agree or disagree with the following statements?



Everyone
thinks
business
can help



Global agreement over business impact



On which THREE of these issues can a business in your country make the biggest positive impact?



Down to us



And we need to speak to these

48 Faces

Walk to the
problem



Think in Five G's

Rebuild the social
contract

Engage society
by delivering on
the basics

Find ways to
engage more of
these 48 faces