

THE STAKES FOR INNOVATION LEADERS IN THE U.S. ELECTION



Amy Huras
Research Director

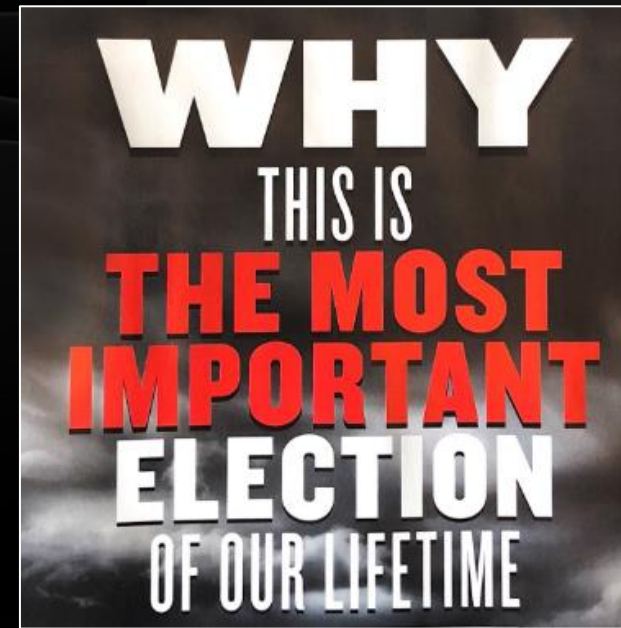


Anthony Schiavo
Senior Director



Alina Strugut
Research Director

SO, IS IT?



UNDERSTANDING ELECTION IMPACTS

1

**Consumer
views on the
election**

2

**Consumer
beliefs on
the issues**

3

**Policy
impacts and
outlook**

WHAT IS THE PUBLIC THINKING ABOUT?

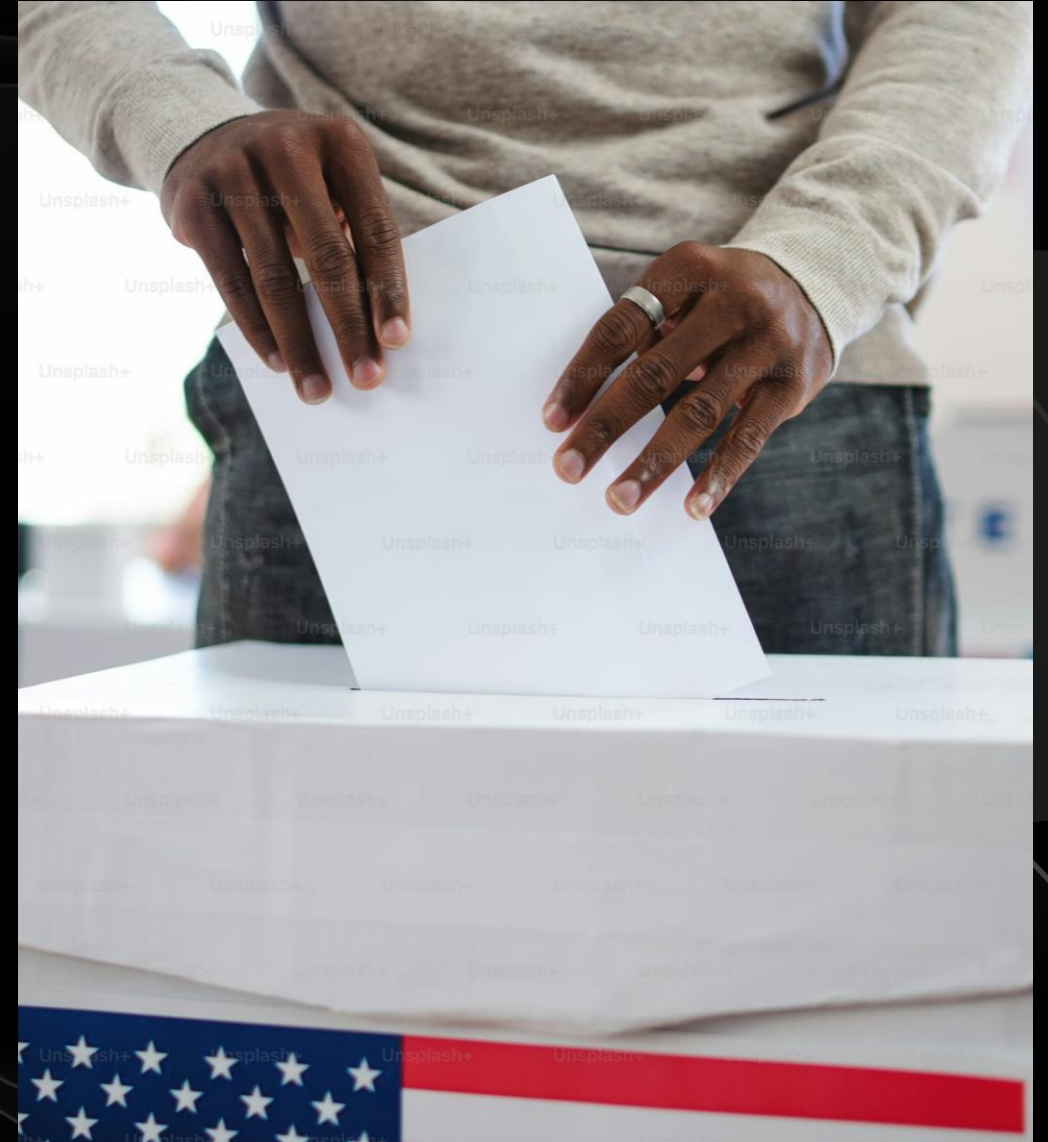
The four microcultures relevant to the 2024 U.S. presidential election

- 1. Safeguarding Democracy**
- 2. Increasing Divisiveness**
- 3. U.S. Global Leadership**
- 4. Gender, Race, & Power**

SAFEGUARDING DEMOCRACY

Consumers across the political spectrum feel that American democracy is under threat.

- External — foreign interference
- Internal — erosion of trust in the democratic process



INCREASING DIVISIVENESS

Consumers worry the election will further damage national unity, no matter who wins.

- Prioritizing divisive personalities over policies
- Damaging personal relationships



U.S. GLOBAL LEADERSHIP

Consumers think the election outcome will impact America's standing on the world stage.

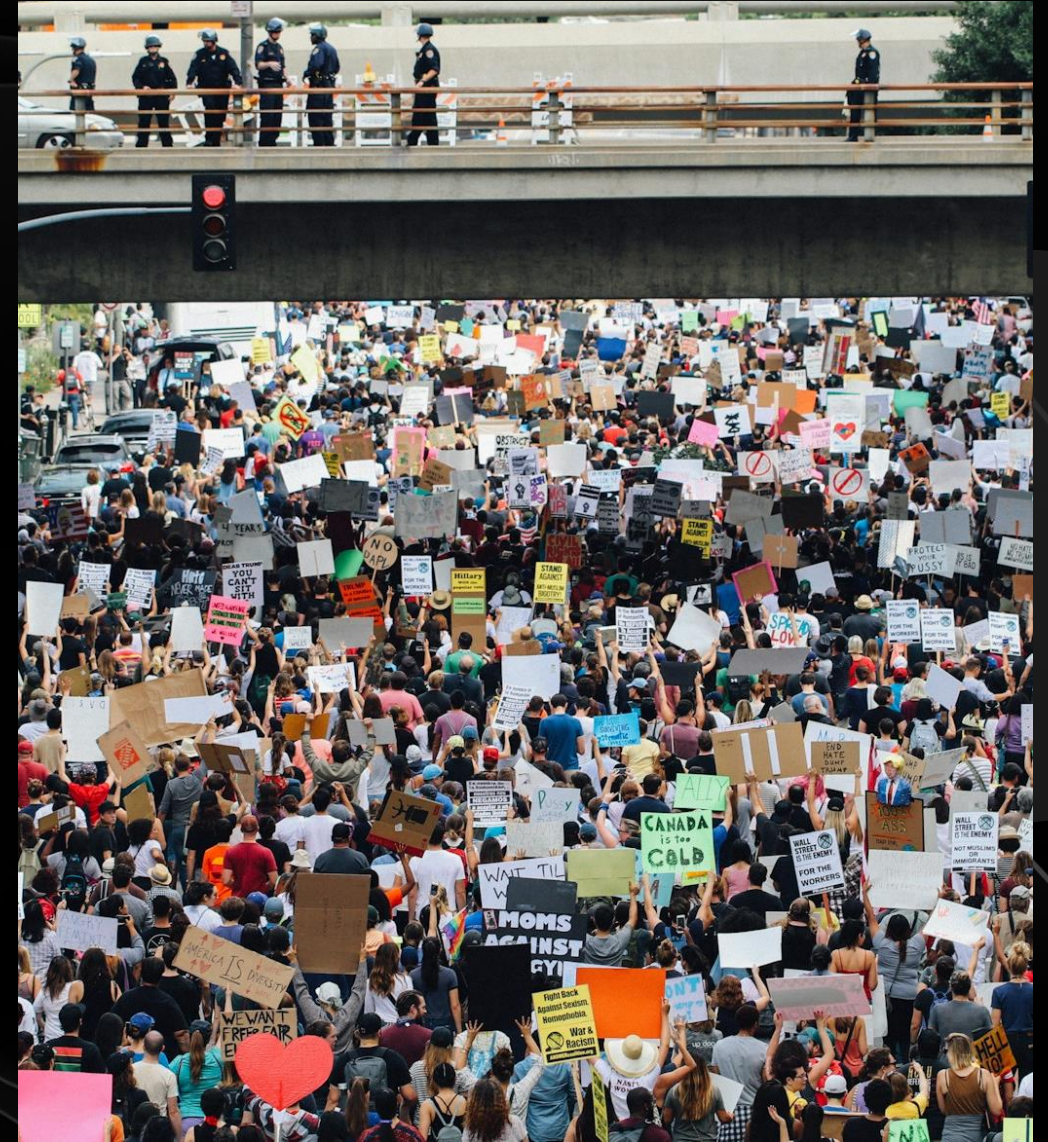
- Impact on international alliances
- Ability to handle foreign threats



GENDER, RACE, & POWER

Consumers think voting can influence social structures around race, gender, and class.

- Impact on gender norms
- Redefining political coalitions



WHAT ABOUT THE ISSUES?

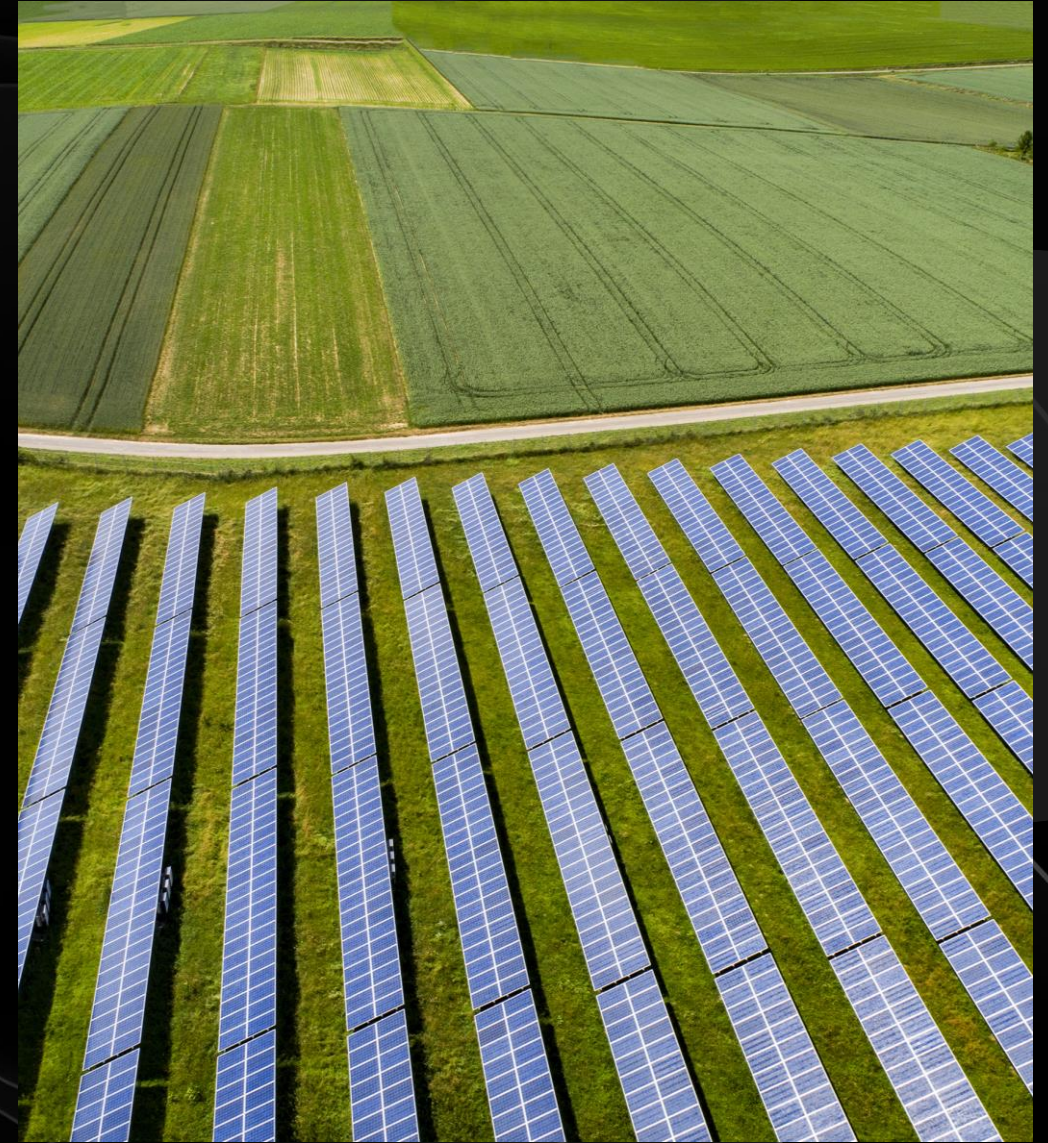


GREEN ENERGY DIVIDES VOTERS

Distrust of Big Business: Policies seen as favoring the wealthy, not consumers

Climate vs. Economy: Split between green energy and economic priorities

Cost Worries: Concerns over financial impact and access





POLICY CHANGE MAY BE MORE MUTED

Trump would seek to repeal or undermine the Inflation Reduction Act — though likely without much success.

Harris would likely continue Biden's policies but would need congressional support to expand on them.

Overall impact is likely to be more modest than rhetoric suggests.

VOTERS ALIGN ON MANUFACTURING

Reshoring Consensus: Key to economic independence and job creation

Investment Divide: Green tech vs. traditional industries supports split

Job Security: Green jobs seen as future-proof; fossil fuel jobs viewed as reliable





TRADE POLICY IMPACT DIVERGES

Trump has promised huge, disruptive tariffs combined with tax cuts.

Biden was also hawkish on China, though to a less extreme degree.

Prepare for major disruption in supply chains with a Trump win — but ongoing restrictions in any case.

REGULATORY VIEWS DIVIDE VOTERS

Regulation Split: Stricter rules vs. minimal oversight for growth

Freedom Clash: Environmental protections vs. business freedom

Resilience Debate: Proactive climate investments vs. rapid recovery focus





MAJOR NEAR- AND LONG-TERM IMPACTS

Trump took an aggressively deregulatory stance in his first term.

Biden has used administrative power more aggressively, despite the courts.

The long-term scope of the federal government's role in regulations is up for grabs.

KEY TAKEAWAYS

1

Understanding sentiment about the election helps brands craft messages that resonate, manage risks, and avoid backlash.

Consumers across the spectrum crave connection amid the divisive nature of the 2024 election.

2

Despite differences, voters want policies that work for everyone — seeking fairness, not just political wins.

The real challenge lies in crafting policies that bridge economic divides and deliver tangible benefits to all — particularly in areas where voters may disagree about what's desirable.

3

While there's bipartisan alignment on some issues, the policy stakes are real.

Despite some shared goals, the candidates have sharply different visions — while the nature of the U.S. political system will block some precipitous changes, the result will have near- and long-term impacts on regulation and incentives.



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