

WEATHERING THE STORM

Brand Management
in the COVID-19 Era

How brands can drive situation-sensitive yet purpose-led growth during this tumultuous and troubling time



TABLE OF CONTENTS

| | |
|----|--|
| 3 | Introduction |
| 4 | Our Approach |
| 5 | Key Takeaways |
| 6 | Setting the Scene |
| 9 | The Role Consumers Want Brands to Play |
| 19 | ACTIONS: Actions to take & contributions to make |
| 26 | COMMUNICATIONS: What to say & how to say it |
| 34 | Conclusion |



INTRODUCTION

The coronavirus pandemic is the most complex and multifaceted threat that leaders in business have faced in the 21st century. Americans are deeply anxious about the state of affairs, are responding severely and quickly to new developments, and are looking for leadership.

Companies have a clear opportunity to be there for customers when the chips are down and, in doing so, build their foundation for substantial long-term brand equity gains. While breaking through beyond established customer bases will be difficult for most under these circumstances, consumers are expressing a relatively high degree of forgiveness as organizations adjust to the economic shutdown and society settles into this new normal.

Proactively communicating with, appropriately connecting with, and authentically comforting your audience have the potential to translate to everything from increased affinity in the short-term to unbreakable loyalty in the long-term.



OUR APPROACH

Morning Consult is at the forefront of survey research providing accurate and actionable intelligence needed to guide organizations through this time. Our research capabilities excel in essential data mining, data management and accurate deliverability to help you make informed and strategic business decisions.

BRAND INTELLIGENCE

Our brand tracking platform provides deep insights into how changing consumer habits during the pandemic are impacting their brand choices and purchasing consideration.

[LEARN MORE](#)

RESEARCH INTELLIGENCE

Morning Consult has been tracking the impact of the coronavirus on consumer habits since January, providing the most up-to-date trend data on the pandemic.

[LEARN MORE](#)

ECONOMIC INTELLIGENCE

Morning Consult conducts consumer confidence surveys in 12 international markets, providing daily tracking and deep demographics on consumer expectations and spending habits.

[LEARN MORE](#)

This report is based on quantitative research conducted among 2,200 adult Americans on March 28-29, 2020, in addition to analysis of Morning Consult's Brand Intelligence data, comprising thousands of daily interviews on over 2,000 brands.

KEY TAKEAWAYS

Companies aren't getting blamed for the situation we're in, but society expects them to be part of the solution. With only half of Americans trusting large corporations to lead us through this challenging time, brands face a fortuitous fork in the road: They can either fall silent in the face of stormy weather, or step up and face this unprecedented challenge by leaning in for their stakeholders, helping to solve the situation, and ultimately laying the groundwork for the fertile ground sure to come after the storm passes.

To weather the storm, it's critical to:

- Understand **developments in buying behavior, consumption preferences, and overall attitudes, as well as brand sentiment**, especially which behavioral and attitudinal changes are going to be permanent — ongoing insight on changing consumer dynamics is imperative as the situation continues to evolve and potentially sticky habits form
- Consider the **implications of actions taken today on consumer relationships tomorrow** — when trust can be broken in a moment, real-time insight on what's working and what's not, as well as how actions will be viewed by consumers in the long term, is especially critical, particularly along dimensions that matter most like relevance and trust
- **Put people** — your customers, staff, and ideally society as a whole — **before profits** to build affinity today, trust into the future, and loyalty for the long-term
- Whether through products that make people's lives easier or in broader aid to combat the crisis, **it's no longer about talking about values, it's about demonstrating them** — show how you are helping
- Forget about being overly feel-good, and instead **act with both empathy**, keeping promises, providing useful information, and making sacrifices to contribute to the greater good, and **authenticity** — “rubber hits the road” applications of purpose will go farther than talk
- Show you are taking this situation seriously by **acknowledging** the social, financial and other realities of this pandemic, **empathizing** with people's concerns, and **offering** practical solutions
- Stay in touch with your humanity by **widening your aperture** to stakeholders, not just shareholders — help your customers as fellow people, treat your employees fairly and with dignity, and contribute to the greater good of society to drive both greater likelihood of purchase today, and also consumer choice into the future
- Above all, whether by serving customers in new ways, implementing new procedures to protect their well-being, or making an effort to help the broader situation, **don't disengage from the moment**

SETTING THE SCENE

How Public Opinion & Consumer Habits Have Shifted

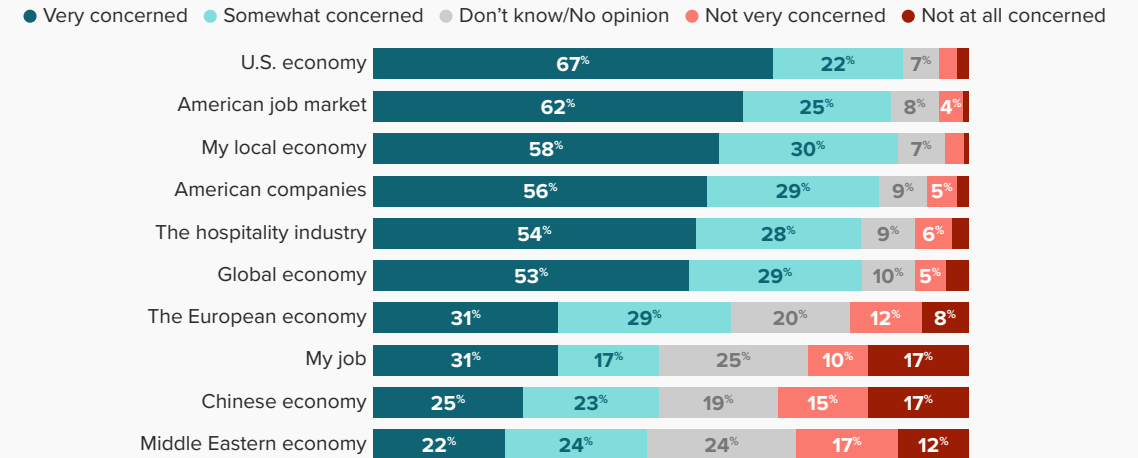
It's unsurprising that consumers don't know where to look or who to trust these days. Eighty-seven percent of Americans, the vast majority, are at least somewhat concerned about the pandemic, and most are deeply concerned about the coronavirus' impact on both the U.S. economy broadly and their local economy.

Americans also don't know who to blame for externalities related to the pandemic, namely rising unemployment. Over a quarter of the population is unsure of who to blame for rising unemployment, a near-third blames the president and his administration, and nearly a quarter blame "something or someone else."

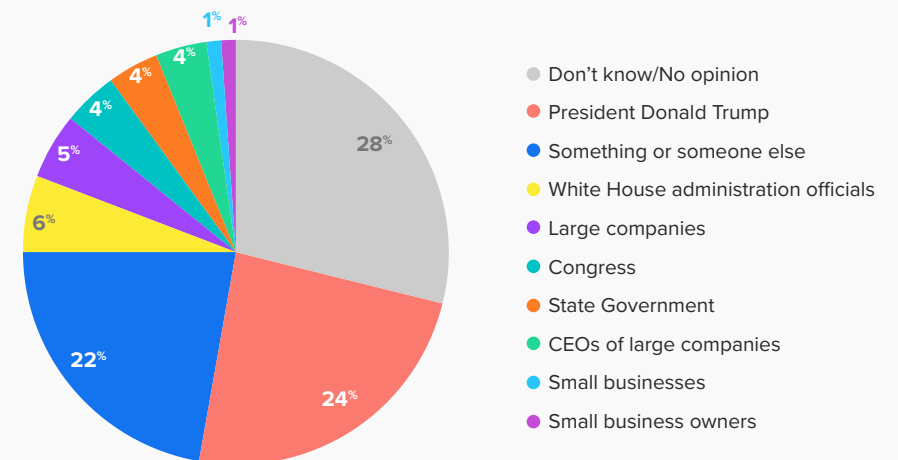
DIVING DEEPER

As might be expected, there's nuance along party lines: **53%** of Democrats blame Trump vs. **33%** of Independents and **10%** of Republicans; most Republicans, **49%**, blame something or someone else.

How concerned are you that the coronavirus will impact the following?



Who do you blame most for unemployment rising in the United States due to the coronavirus?

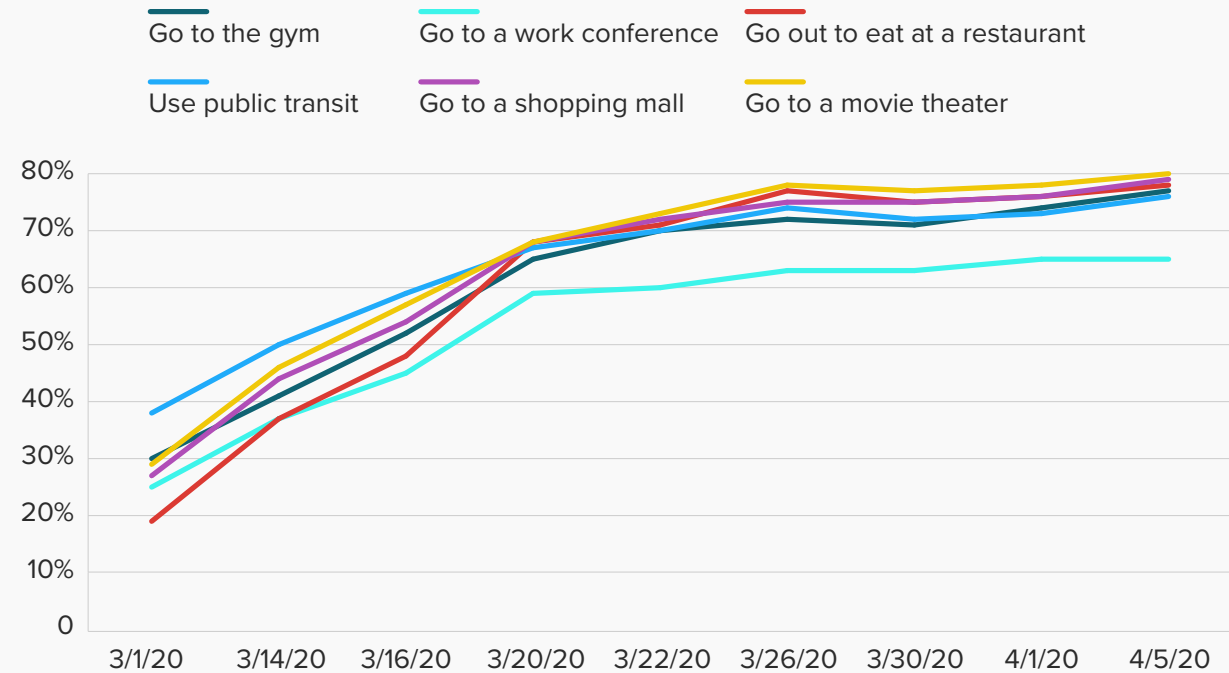


SETTING THE SCENE

While it's undeniable that consumption behaviors are changing at a rapid pace, less obvious is that, given this context, consumer priorities are too. Morning Consult's daily tracking of consumer sentiment combined with daily research on brands, consumers, and the choices, attitudes, and preferences that connect them confirm that changes we're seeing today will endure tomorrow.



Share of U.S. adults who said they are less likely to do the following, based on fears over the coronavirus



As for brands? Americans feel emotionally drained, financially strained, and health-conscious. Their decision-making, emotions and energy are depleted, focused on their personal well-being instead of their consumption of products or brands. Consumer needs, expectations, and relationships with brand relationships are evolving rapidly, just as this situation destroys any semblance of strong consumer sentiment.

And so, hidden within this confusion and complexity, is a critical inflection point for brands.

Trust is scarcer than ever, the debate between short-term swindling and long-term strategy is raging louder than ever, and with the Business Roundtable declaring just months ago that a company's purpose was to be not solely for shareholders, but for all stakeholders — including customers, employees, and communities — it's time for promises of the past to become practices of the future.

As we face a new world order where trust, community support, societal contributions, and even potentially painful sacrifices take greater precedence in driving consumer choices, the balance is shifting to stronger, more human relationships founded on brands showing up in new ways for new consumer needs during unprecedented times.



THE ROLE CONSUMERS WANT BRANDS TO PLAY

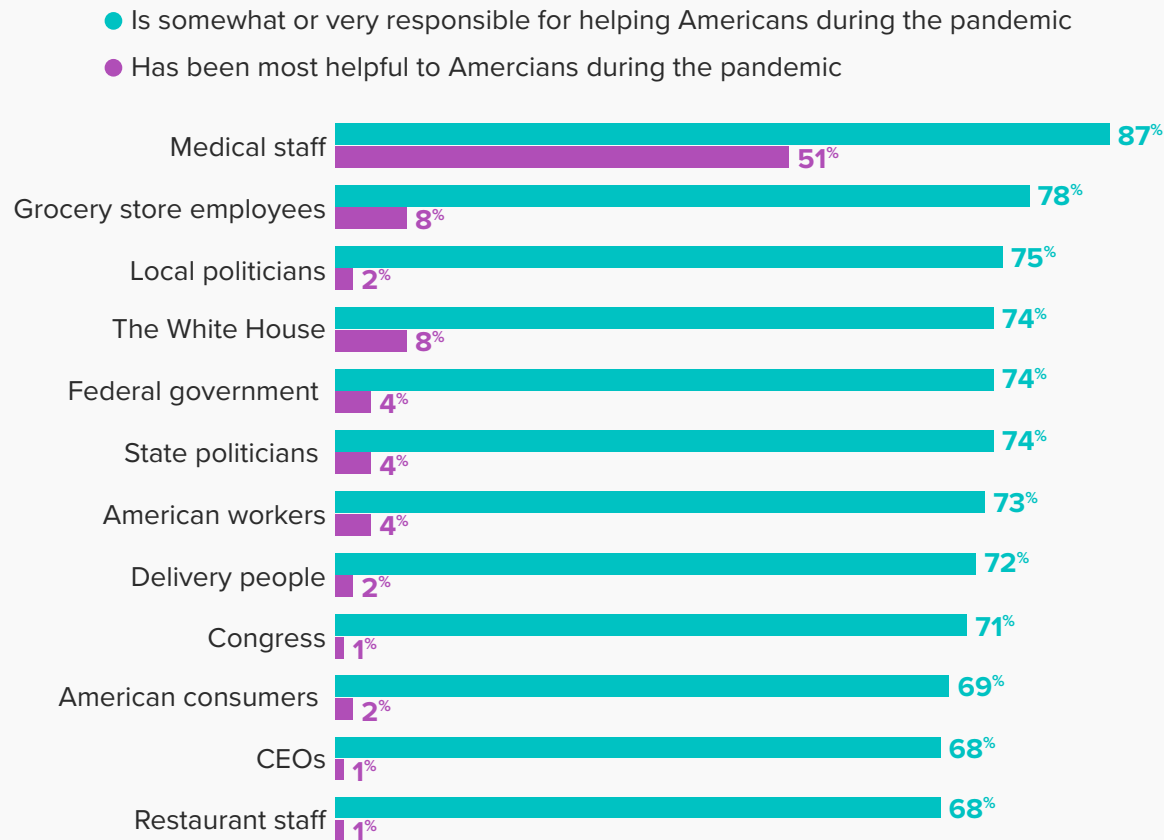
Teeing it up

It's clear that especially during tough times, the basics matter most. First and foremost, focus on real action around functional needs of both your customers (think availability, accessibility, cleanliness, safety, and reliability), and your team (that means job stability, income reliability, and benefits). Continuing to do what you do for your consumers, making every effort to avoid significant service interruptions, and staying in touch with your humanity will not only drive consumer choice into the future but also a greater likelihood of buying from you today.



Logically, the reality is that most Americans hold medical staff, the government, and other frontline workers like grocery store employees responsible for helping society during this pandemic — and indeed those are the entities Americans acknowledge have done most to help to date. **But, it's worth noting that a majority of the population also holds CEOs at least somewhat accountable for helping Americans through this time.**

Expectations vs. Reality: Helping Americans During a Pandemic



DIVING DEEPER

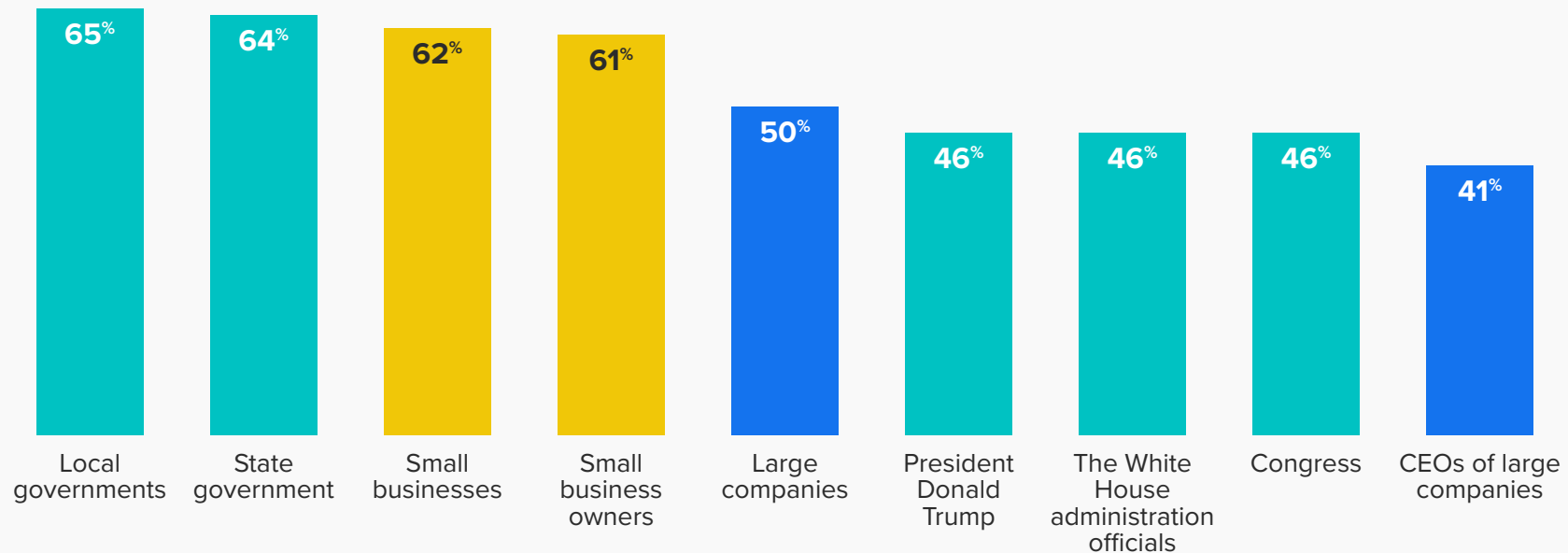
- Gen Z generally agrees with the rest of Americans, but they are less strongly opinionated about who they hold responsible.
- Unsurprisingly, Republicans are much more likely to give the White House credit for helping Americans most during this pandemic (17%), while Democrats are much less likely to do so (2%).



Corporate America is not being blamed for our current reality, but a significant portion of the population nonetheless expects it to rise to the challenge and lead the U.S. through this crisis. With only 5% and 4% of Americans placing blame for rising unemployment caused by the pandemic on large companies and the CEOs of those organizations, respectively, these groups should be relieved — but should nonetheless be concerned that only one out of every two Americans trust them to lead the U.S. through the pandemic.

How much do you trust each of the following to lead the United States through the coronavirus pandemic?

Those who said some or a lot



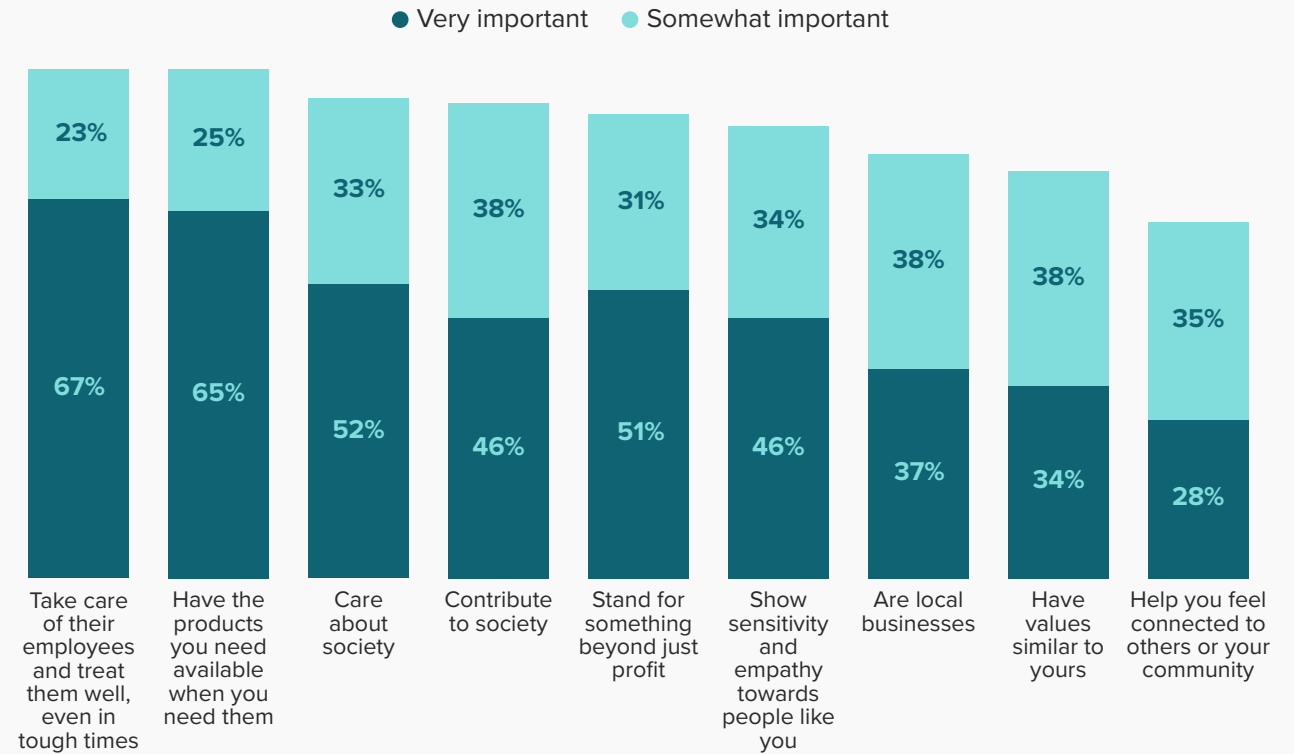
THE ROLE CONSUMERS WANT BRANDS TO PLAY

During a time when small businesses on the frontlines are more top of mind and more visibly making real sacrifices to serve consumers' immediate needs, big brands run the risk of losing affinity, trust, and loyalty to smaller, more local players. However, this impressionable level of trust paired with high expectations creates opportunities for brands willing to rise to the challenge, embrace consumers' evolving needs during times of troubles, and deliver in unexpected ways.

Generally speaking, it's most important to Americans that companies take care of their employees and treat them well, even in tough times, and that they have products available when consumers need them.

Though it could be argued that these sentiments around general buying behaviors are magnified given sensitivities stemming from the pandemic, the underlying attitudes are nonetheless critical for companies to acknowledge and act on. While these attitudes drive consumer choices today, it's increasingly evident that purpose and values will only matter more to consumers as they make purchase decisions post-pandemic. Companies acting appropriately and in service of a broader set of stakeholders stand to gain more than affinity when consumers return to full spending potential — they will have earned invaluable trust, and in turn, purchase preference.

How important is it to you that companies you purchase goods or services from do each of the following?

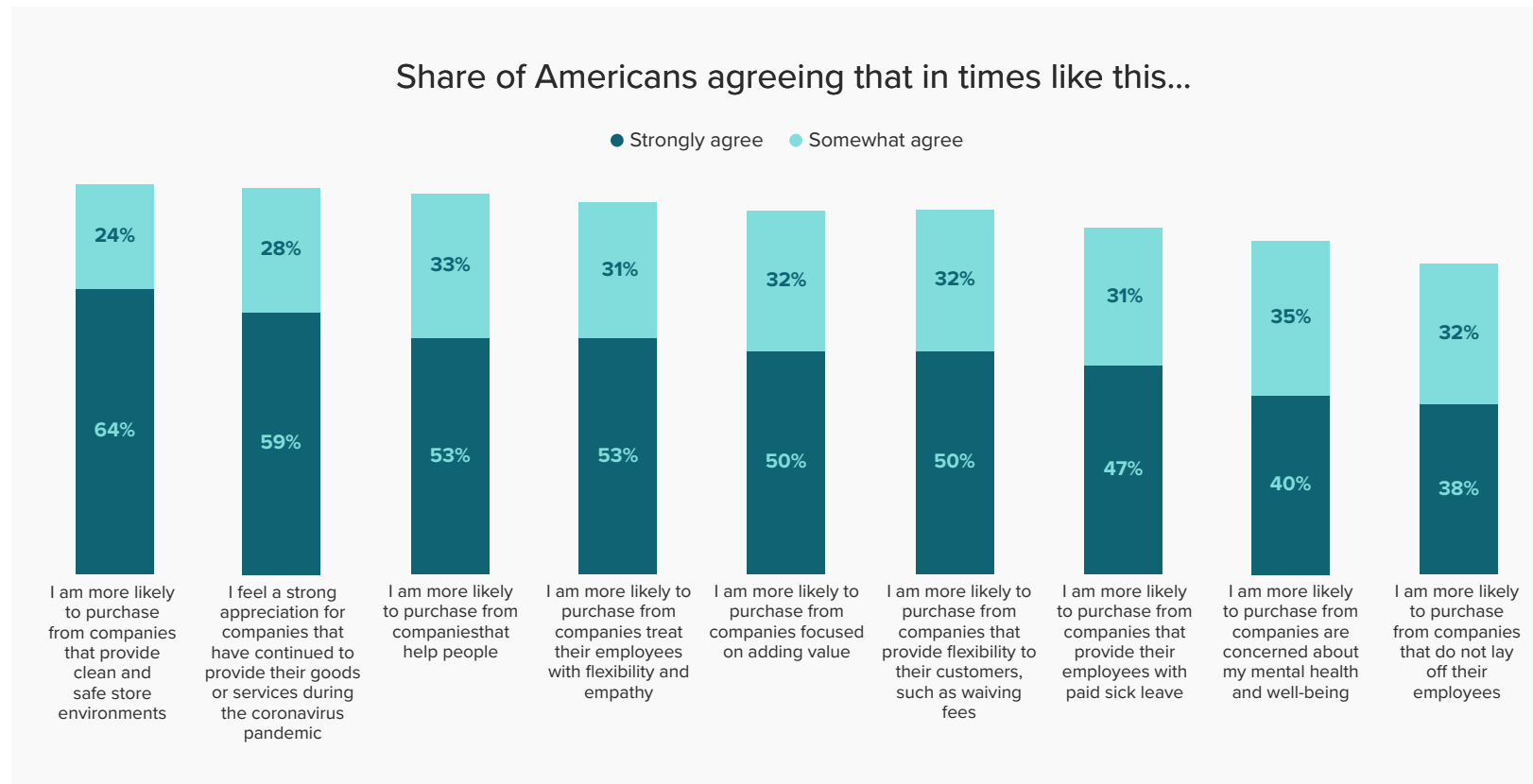




THE ROLE CONSUMERS WANT BRANDS TO PLAY

To that end, in the context of the pandemic, consumers are much more likely to buy from companies that provide clean and safe store environments (88%), that help people (86%), and that treat their employees with flexibility and empathy (84%). They also feel a strong appreciation for companies that have continued to provide their goods or services during the coronavirus pandemic (87%), reiterating that pains brands are experiencing and sacrifices they're making are not going unnoticed — quite the contrary, in fact.

Aligning with both drivers of choice during normalcy and drivers of purchase during the pandemic, Americans' top five considerations when deciding whether or not to buy from a company right now are largely rooted in functional needs: product availability, safety and cleanliness, financial accessibility, and compliant solutions.



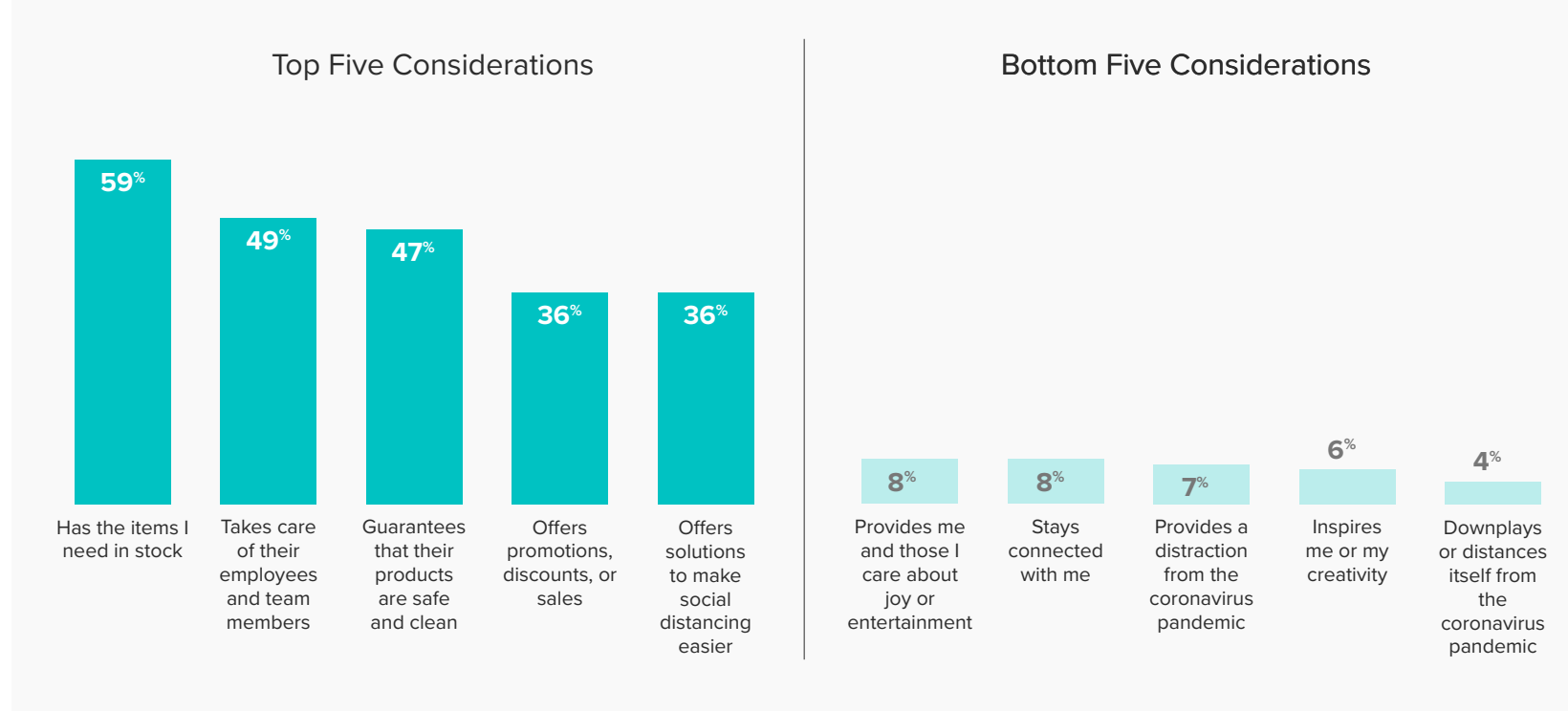
DIVING DEEPER

- **Gen Z reactions are more negative than the general population's: They more strongly disagree that certain corporate actions would drive their propensity to buy.**
- **Boomers are more likely to buy from companies focused on adding value to their customers' lives, above and beyond just making a profit (87% vs. 82% total pop) and those that provide flexibility, such as waiving fees, to their customers (87% vs. 82% total pop); they also feel stronger appreciation for companies that have continued to provide their goods or services during the coronavirus pandemic (92% vs. 87% total pop).**



We recognize, for most brands, straddling the line between practical and emotional is more than complex. Still, concern for how companies are treating their frontlines remains strong. Also worth noting: attempts at joyfulness, entertainment, or inspiration won't make an impact on consumers stunned and consumed by a serious situation. As such, distracting or distancing from reality won't be appreciated, nor will unhelpful and self-serving attempts to stay connected with overwhelmed and uninformed audiences.

Which of the following are most important when deciding whether or not to purchase a product or service from a company right now?



DIVING DEEPER

- **Second to having items in stock (48%), the companies offering solutions to make social distancing easier is a top driver for Gen Z, with 35% indicating this is important to them. It's also notably more important to Boomers (44% vs. 36% total pop), and to women (44% vs. 28% of men).**
- **Companies offering support to customers or helping to improve their customers' situation is notably more important to Gen Z than other generations (28% vs. 22% total pop) — and in fact, the importance of this decreases with age.**
- **Being transparent and open in communications with customers is more important to Boomers than it is to other generations (important to 33% of Boomers vs. 23% of all other generations).**



ACTIONS

Actions to take & contributions to make

This new market landscape fraught with frustration, confusion, and uncertainty yields immediate implications for how brands can best triage the situation facing their business, their customers, and society today — and, in doing so, they can simultaneously establish a trajectory to win more surely tomorrow. Invoking customer-centricity best practices, identifying and addressing customers' emotional and functional needs during this time will build affinity, trust, and ultimately loyalty when the skies clear

ACTIONS TO TAKE

Teeing it up

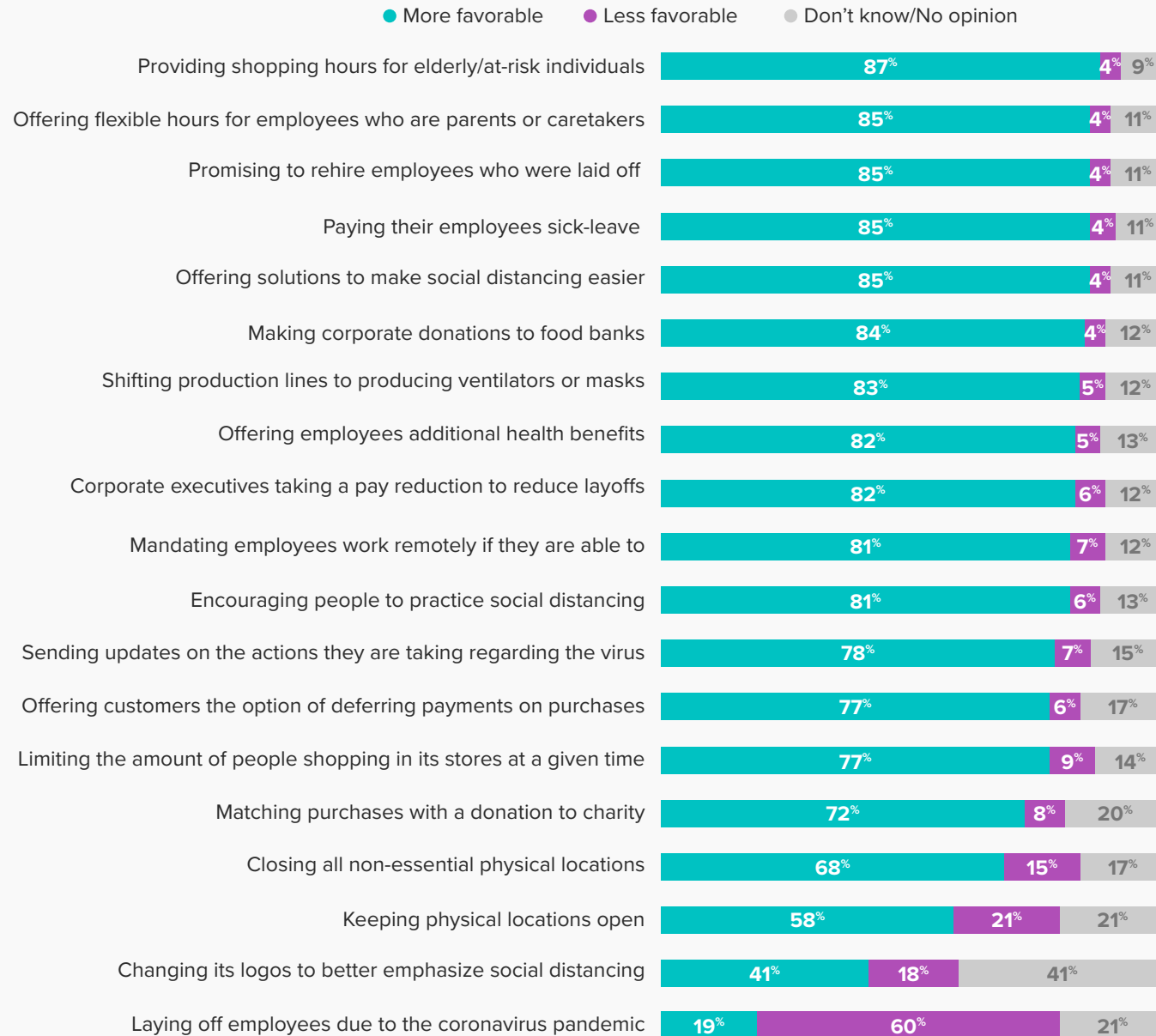
In a reality where everyone is concerned about their jobs, health, and welfare, people are looking out for each other, perhaps more than usual — and they're taking particular notice of how you treat your people. Layoffs are a particularly touchy topic; consumers will view companies taking this action less favorably, and will likely purchase from them less in the future. Nonetheless, they expect to hear about the support those laid off will receive from their former employer — even if it's just the promise of being rehired.



ACTIONS TO TAKE

A number of gestures would lead consumers to have a more favorable view of your company. In general, the same actions that fuel strong favorability also drive increased purchase consideration - though less so for Gen Z, a generation more skeptical across the board.

In light of the coronavirus pandemic, would you have a **more or less favorable** view of a company if it did each of the following?

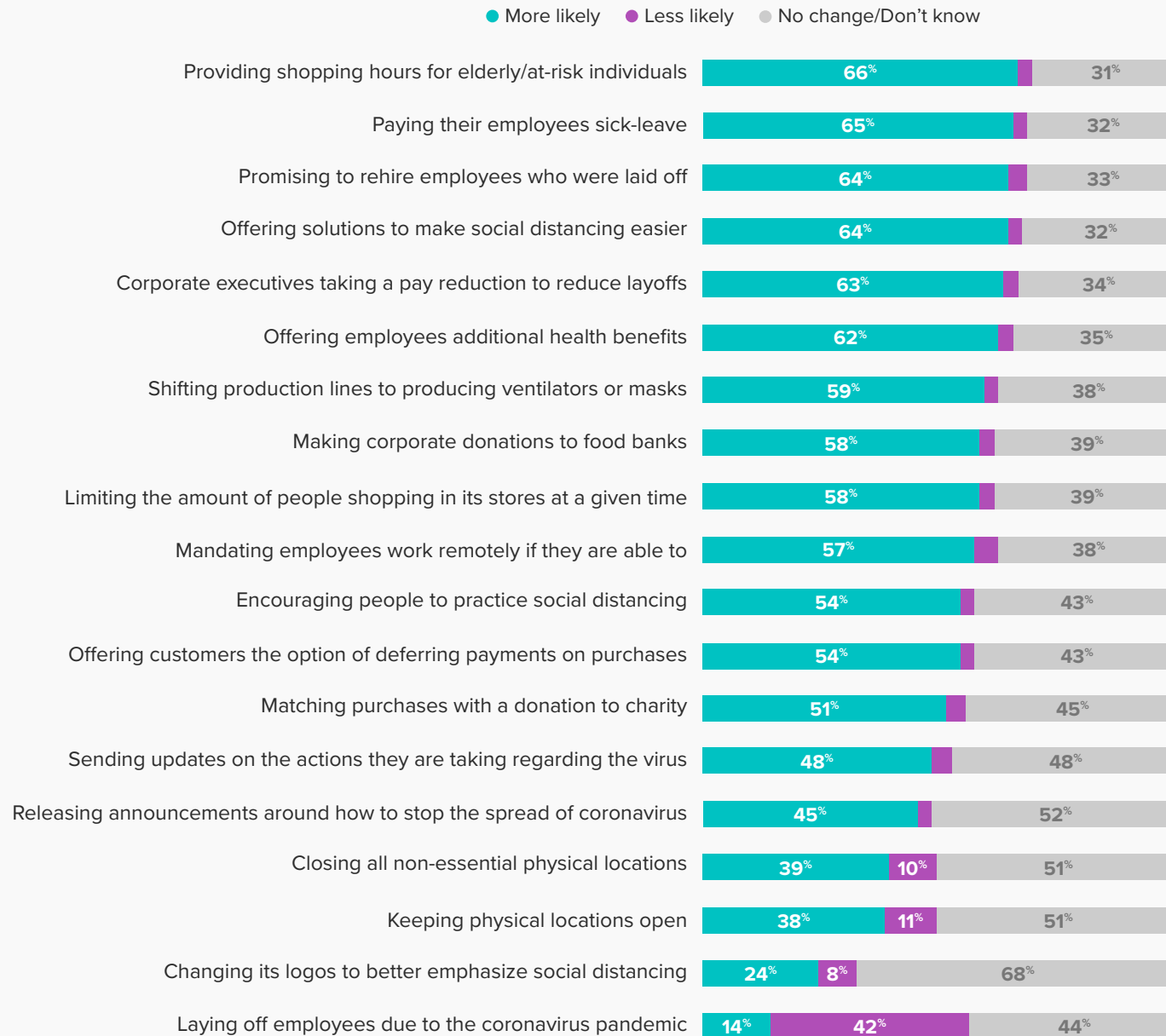




ACTIONS TO TAKE

It's worth noting that some corporate actions translate to increased likelihood of purchase among older generations much more significantly than they do among younger ones.

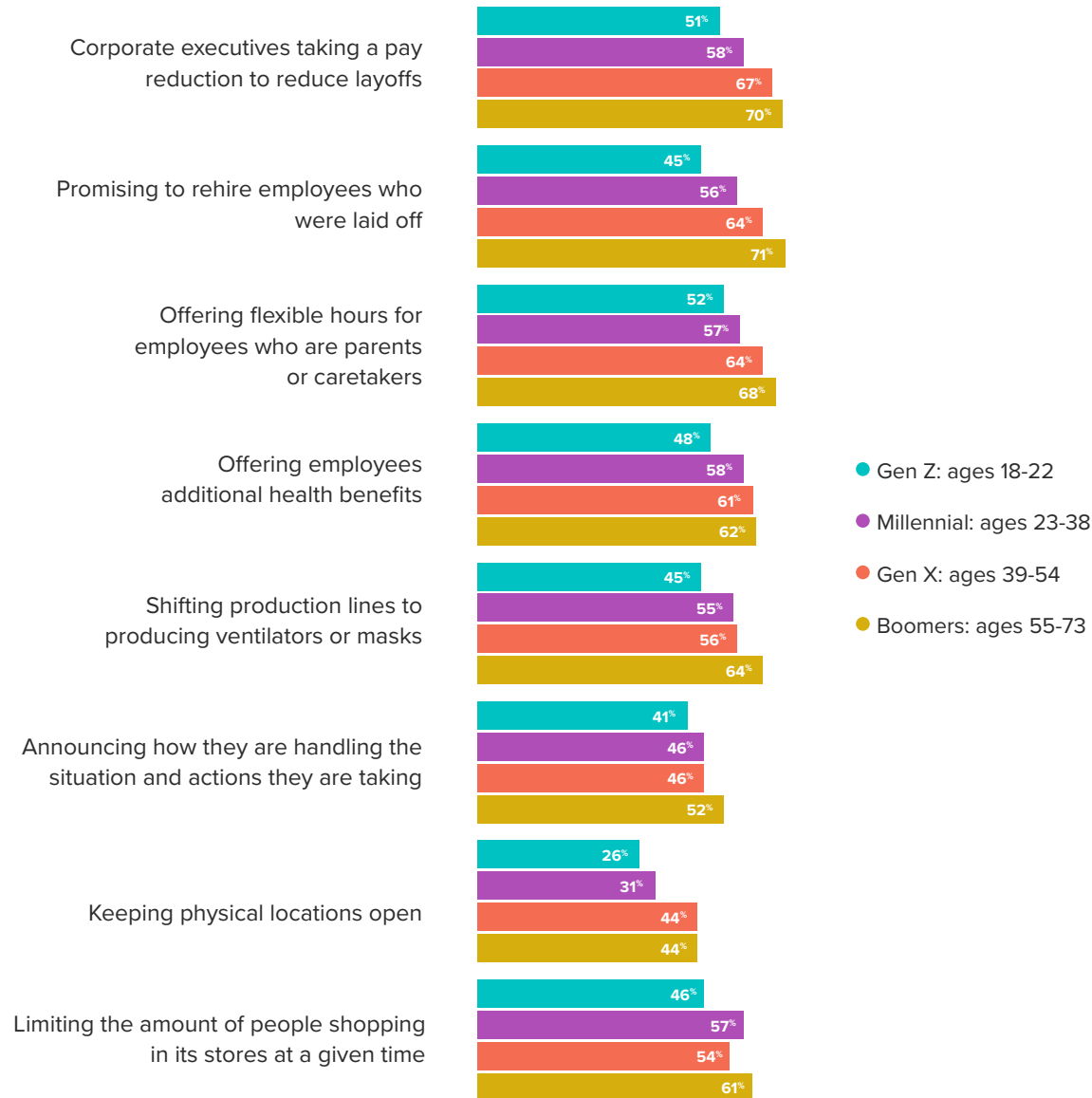
If a company did the following, would you be **more or less likely** to purchase their product or service?





By Generation

Those who said they would be **more likely** to purchase from a company if they did the following.



DIVING DEEPER

- 66% of Americans are more likely to purchase from companies that provide shopping hours for elderly or at-risk individuals (vs. 53% for Gen Z).
- 65% of Americans are more likely to purchase from companies that pay their employees sick-leave (vs. 50% for Gen Z).
- 64% of Americans are more likely to purchase from companies whose corporate executives take a pay reduction to reduce the number of company layoffs (vs. 51% for Gen Z).
- 64% of Americans are more likely to purchase from companies that offer solutions like free delivery to make social distancing easier (vs. 56% for Gen Z).
- 63% of Americans are more likely to purchase from companies whose corporate executives promise to rehire employees who were laid off once operations return to normal (vs. 45% for Gen Z).
- 62% of Americans are more likely to purchase from companies that offer flexible hours for employees who are parents or caretakers.
- Changing logos to promote social distancing is among the least effective tactics for driving purchase consideration, with only 24% of Americans indicating it would have this effect on them.

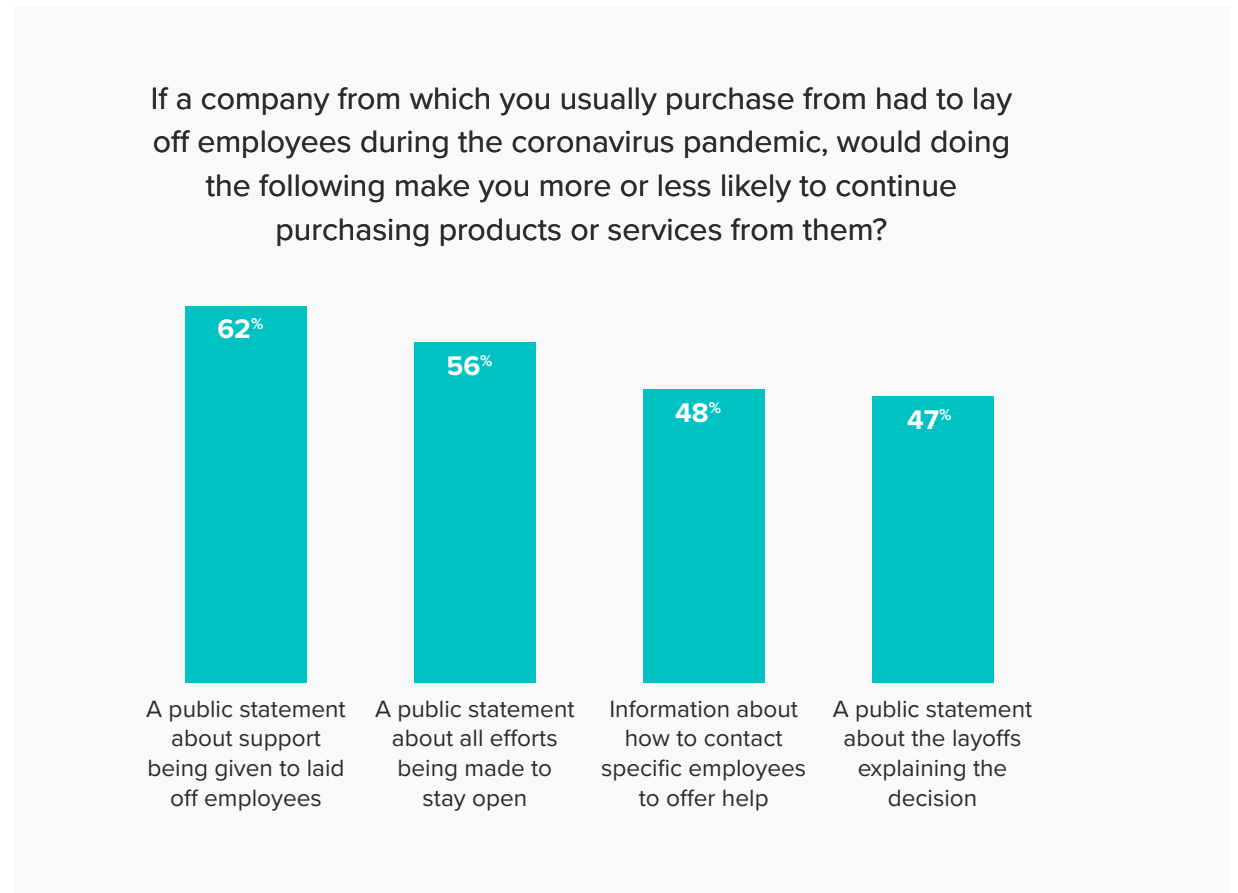
ACTIONS

How to Manage through Hard Economic Times

While there is a relatively high degree of forgiveness as organizations adjust to the economic shutdown and consumers internalize the impact of this pandemic on their everyday lives, layoffs, however, are a sure pain point.

Laying off employees — especially without a public explanation or any post-pandemic remedies in place — has multiple negative repercussions. Doing so would not only lead most consumers to view a company less favorably, it's also the action most likely to backfire on likelihood to purchase, with nearly half of Americans less likely to purchase from companies enacting layoffs. *(See chart on page 17)*

That said, for companies needing to lay off employees during this time, making a public statement about the support being given to laid off employees is the best course of action:



When it comes to layoffs, appreciating that the decision is often complex, there's little to be gained, but much to be lost. So, while naturally best to avoid layoffs where possible to stem negative backlash, careful handling of communications around such a momentous decision and solutions for those displaced are a must.



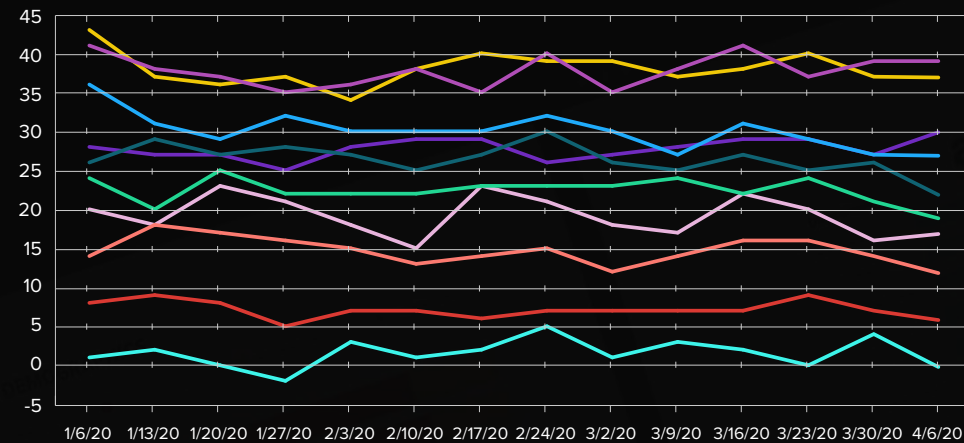
MORNING CONSULT POINT OF VIEW

Reputational Impact of Layoffs

Outside of early movement around trust and favorability, Morning Consult's Brand Intelligence data isn't yet showing substantial impacts on most brand metrics, including trust, likelihood to purchase, community impact, or admirability as an employer among brands enacting layoffs — but this is most likely because awareness of both layoffs and of alternative measures other companies have taken to avoid laying off their staff are still low.

However, once consumers have a better grasp on the magnitude and repercussions of these layoffs, once they have alternate courses of action to compare to, and once they've regained their ability to spend as they'd like, the attitudes they're expressing towards brands that turn to layoffs pose a high risk. As such, there's a clear need to proactively and appropriately handle the situation now in order to stave off a backlash later.

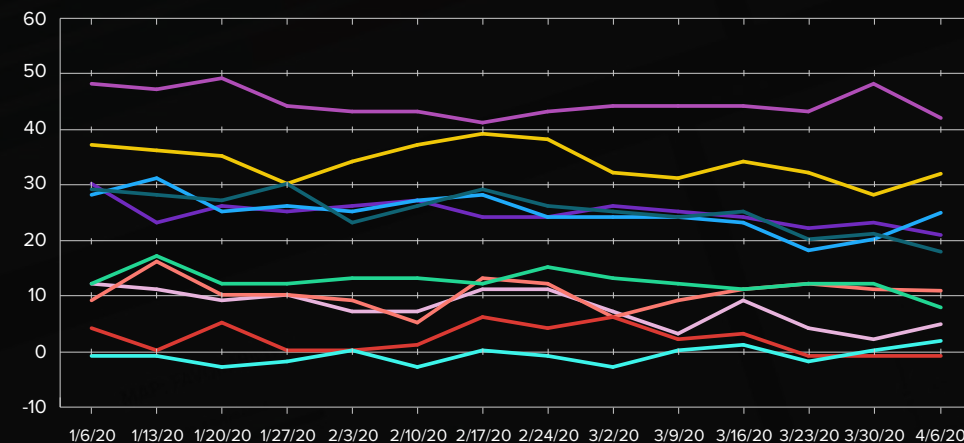
NET TRUST



Companies enacting layoffs due to the coronavirus

- American Airlines
- Bird Scooters
- Caesars Entertainment
- Expedia
- General Electric
- Marriott
- Sephora
- StubHub
- Wayfair
- MGM Resorts

NET PURCHASING CONSIDERATION





CONTRIBUTIONS TO MAKE

Teeing it up

To date, corporate initiatives undertaken in this trying time have been met with varying awareness levels, reputational gains, and brand affinity benefits. So far, consumers are most aware of efforts directly impacting their usual daily and/or shopping routines, suggesting brands' need to close either an awareness gap or a relevance gap. Long-term gains to be had from growing awareness of and appreciation for these initiatives remain to be seen, but consumers' early reactions indicate that making an effort — and your customers aware of that effort — will pay lasting dividends in favorability and purchase preference.



CONTRIBUTIONS TO MAKE

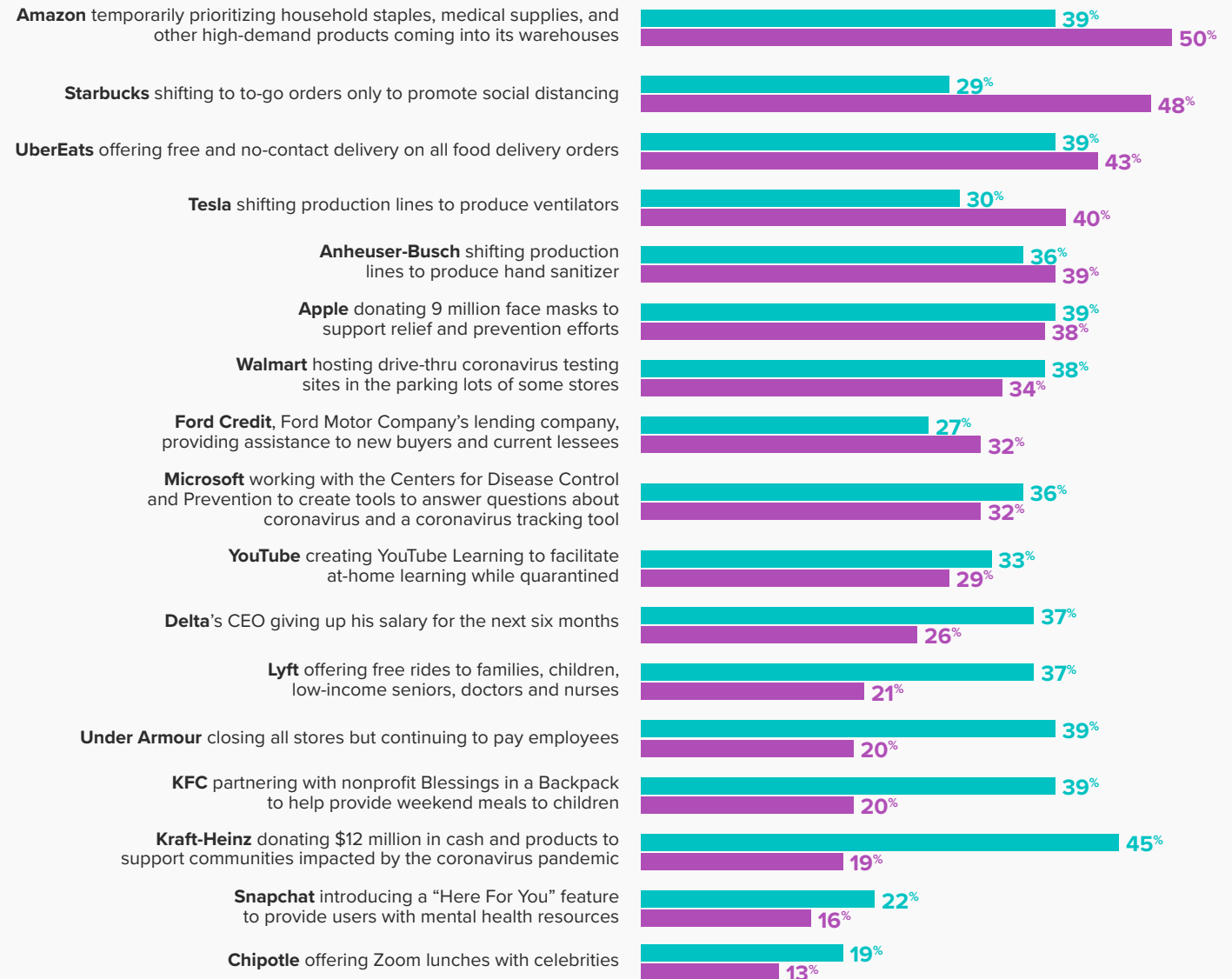
Consumers have heard most about Amazon temporarily prioritizing household staples, medical supplies, and other high-demand products coming into its warehouses and Starbucks shifting to to-go orders only to promote social distancing — likely because these changes have most directly impacted their lives, and changed how they are used to buying from and interacting with companies that play a more regular role in their lives.

Still, with only 50% and 48% at least somewhat aware of those two initiatives respectively, and with most company efforts little-known to the average consumer, it's clear that non-stop news and health updates combined with day-to-day personal responsibilities create a tough environment for messages to cut through.

While the true brand and business impacts of these actions remain to be seen, know that consumers are expecting brands to contribute to solutions even when the chips are down and creative solutions or painful sacrifices might be required.

Awareness And Likelihood to Purchase Related To Corporate Pandemic Initiatives

● More likely to buy ● Heard some or a lot about



MORNING CONSULT POINT OF VIEW

Best practices

Learning from early outcomes: In many cases, it's too soon to tell the long-term impact of corporate efforts on brand and business value, but some initiatives have already begun to translate to movement in Morning Consult's Brand Intelligence data.

In the next few pages, we look at how key brand metrics are shifting for brands that have already taken action.

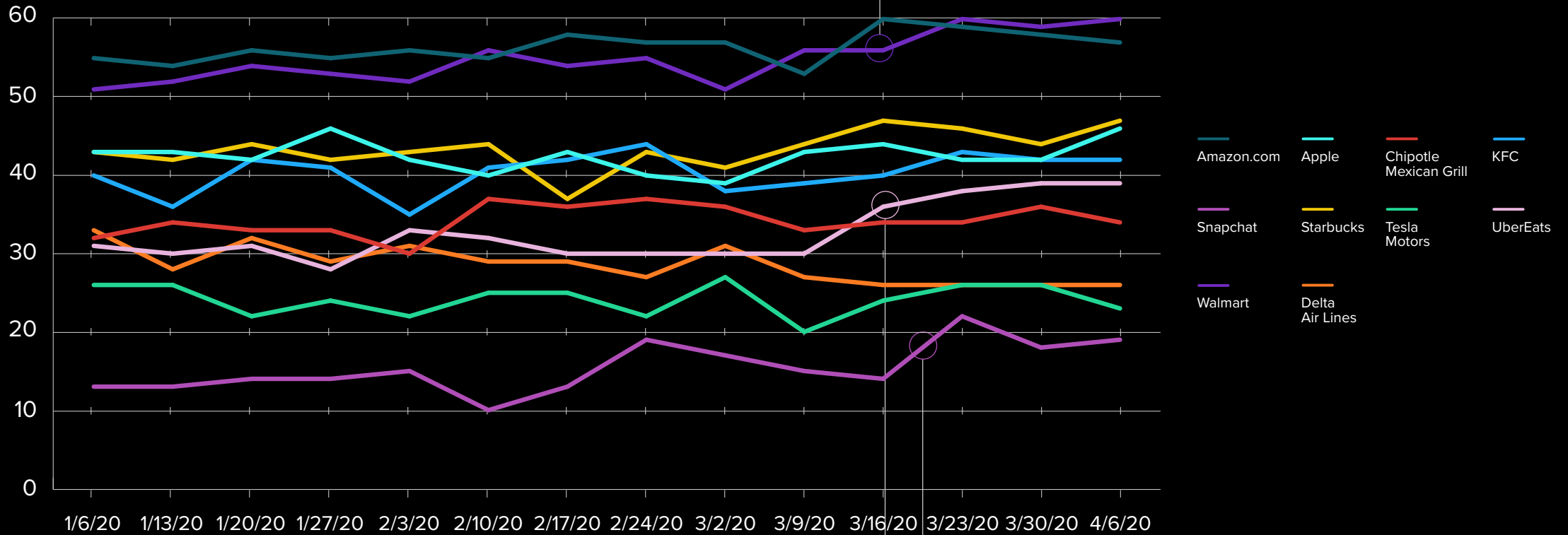
These findings make it abundantly clear that especially during a noisy and complex time, brand efforts are most effective when they're meaningful and relevant to the audience they're designed for (most likely the brand's user base) and when the effort is known widely enough across that target audience.



COMMUNITY IMPACT SINCE THE CORONAVIRUS

The share of U.S. adults who say each brand has a positive impact on their local community

Walmart has seen an increase in community impact for some time, but saw a distinct uptick mid-March, around its 3/15 announcement that it would begin hosting drive-thru virus testing sites in its parking lots



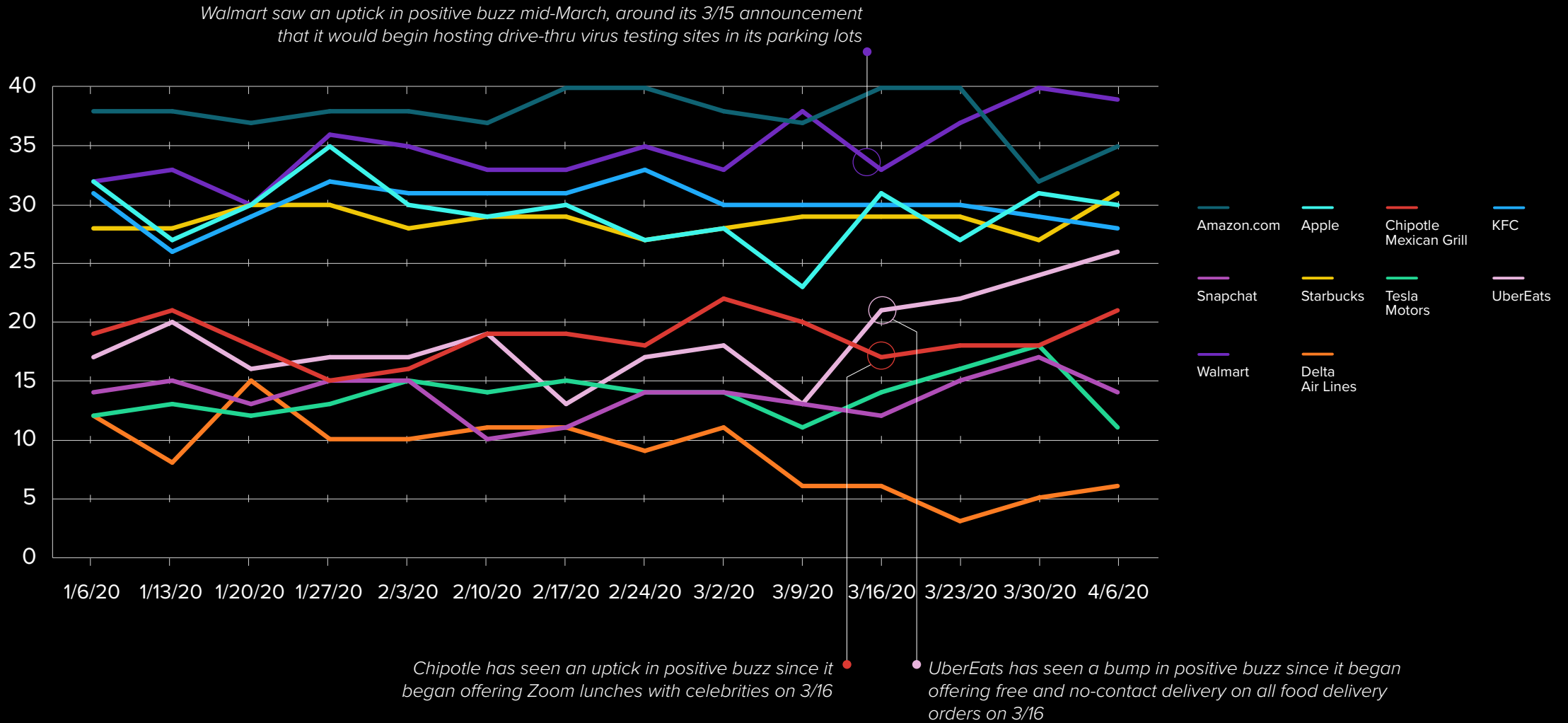
UberEats has seen an increase in community impact since mid-March; it began offering free and no-contact delivery on all food delivery orders on 3/16

Snapchat saw a notable uptick - a distinct reversal from its prior decline - in community impact in mid-March, when it rolled out its "Here for You" feature to provide users with mental health resources



NET BUZZ SINCE THE CORONAVIRUS

The share of U.S. adults who've heard positive news about the brand minus the share who've reported seeing negative news





COMMUNICATIONS

What to say & how to say it

Teeing it up

Advertising in the age of the coronavirus pandemic must reflect our new reality — consumers still expect to see ads, but better aligned with the boundaries placed around our in-real-life interactions. While overtly self-serving and situation-insensitive tones will prove alienating, showing how you can help either the situation more broadly or consumers' situations more specifically will yield increased affinity. Acknowledging the complexity, uncertainty, and frustration of this situation and then providing comfort and optimism would be well-received as well.

But above all, some level of communication is requisite. Just as business strategies need to manage the challenges of the immediate future without ignoring the longer-term horizon, short-term-oriented performance advertising needs to embrace long-term brand-building in order to plant the seeds for the new normal we'll emerge from this pandemic living in.



Only 13% of Americans strongly believe that companies shouldn't be advertising at this time. Amid this unprecedented environment, it's fair to wonder how to best advertise, and if at all, but consumers are clear: **it's not about advertising to, it's about communicating with.** Hearing something is better than nothing, and with companies expected to be contributing to a solution, what consumers hear from companies will have lasting effects.

What to say

Your content and message should be centered around informing, while also improving the situation, helping your stakeholders, not appealing to their wallets, and communicating your concern, not your impracticality or insensitivity.

Consumers, existing ones in particular, want to know how you're providing for and protecting them from harm's way, taking care of your employees, and otherwise managing your business in this unique time. Taken together, companies have clear opportunities to be there for customers and, in doing so, build the foundation for long-term brand equity gains.

News is breaking constantly and developments are evolving rapidly, leaving Americans deeply anxious about the state of affairs and looking for leadership. When asked what brands should communicate with them about, consumers request information on the virus as well as suggestions for prevention. This poses a unique opportunity for brands to lean into consumers' need for trusted entities to provide information that will keep them safe; brands able to provide factual information and practical

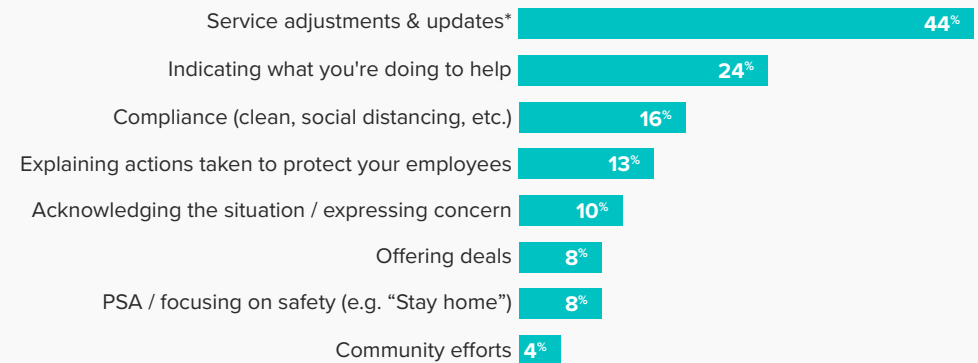
guidance will quickly position themselves as a reliable source of truth at a time when consumers need it most.

Beyond information on the broader situation, consumers are also interested in information related to companies: how they're contributing to solutions, complying with safety and health measures in stores and processes, and taking care of employees. Consumers desire any useful updates you can provide which will have real implications for how they can interact with you: changes to your service, hours, or accessibility, introduction of online or (free) delivery options, and availability of products and services.

DIVING DEEPER

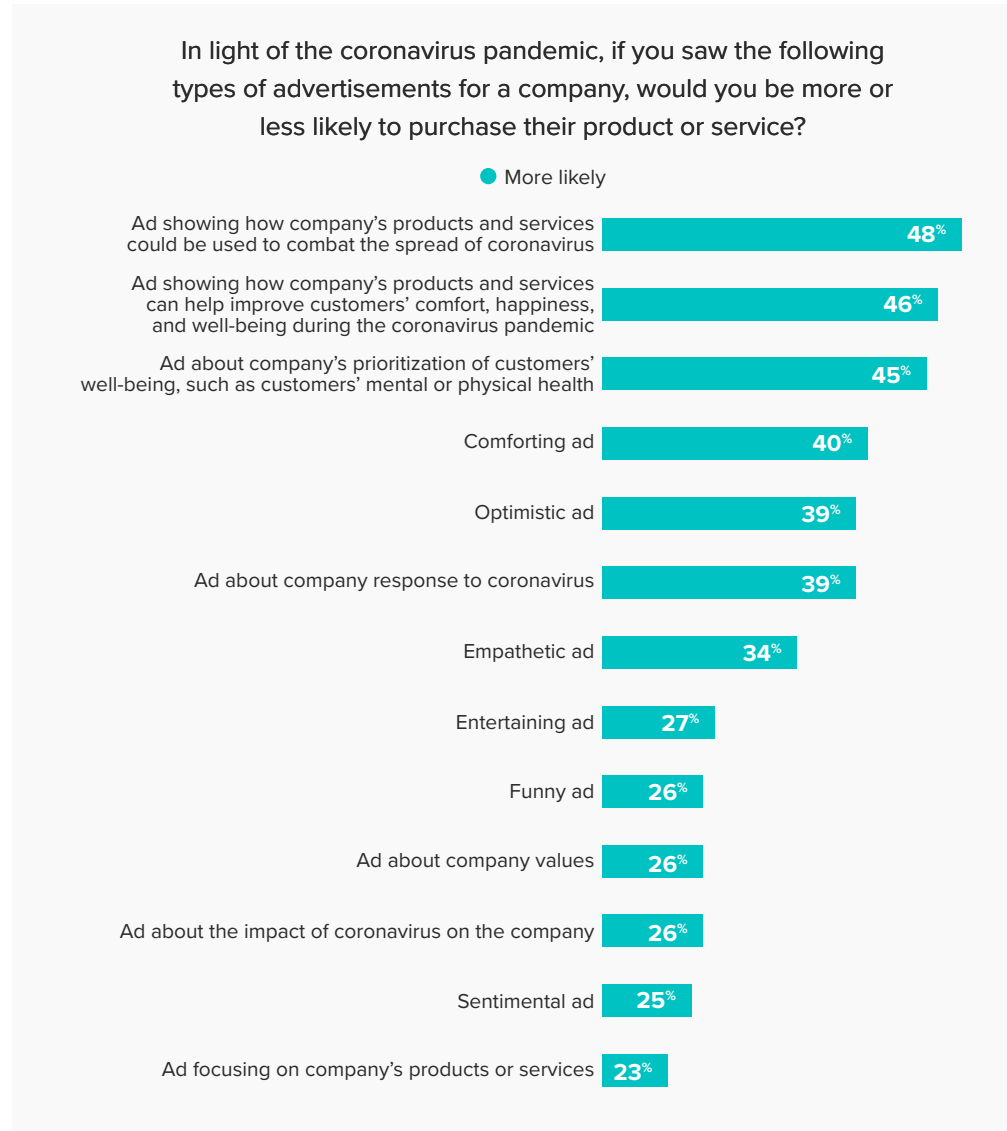
- Younger generations are slightly more likely than the overall population to believe companies shouldn't be advertising at this time (38% for Gen Z and 39% for Millennials vs. 31% for Boomers and 30% for Generation X).

Preferred Content in Advertising



* Hours, online options, free delivery, if still open, products or services still selling / have in stock

While consumers are interested in being informed about developments relating to your business, the critical emphasis is on value-add and relevant information — not product specs.



DIVING DEEPER

Younger generations react differently to certain types of ads than older generations do:

- Only 27% of the population is more likely to buy from a company with an entertaining ad, but 35% of Millennials would be more likely to buy from them.
- While 23% of the population is more likely to buy from a company showcasing its products, only 18% of Boomers would be more likely to do so; their acceptance of and sensitivity to the gravity of this situation - combined with their fear — translates to a desire for solutions, not selling.
- 30% of Gen Z and 33% of Millennials are more likely to buy from a company with a funny ad, vs. 26% of the total population.

Gen Z is notably distinct in its likelihood to purchase from companies with certain ad types:

- While an empathetic ad would make 34% of the population more likely to buy from the advertising company, only 24% of Gen Z would be more likely to buy from them.
- While an ad showing how a company's products and services could be used to combat the spread of coronavirus would make 48% of the population more likely to buy from the advertising company, only 40% of Gen Z would be more likely to buy from them.
- While an ad showing how a company's products and services can help improve customers' comfort, happiness, and well-being during the coronavirus pandemic would make 46% of the population more likely to buy from the advertising company, only 38% of Gen Z would be more likely to buy from them.



COMMUNICATIONS

With so much uncertainty surrounding the timeline, magnitude, and impact of this pandemic, brands have an opportunity to be a welcome source of stability for society. Messages perceived as self-serving, situation-insensitive (failing to connect your offer to this unique reality), and situation-impractical (promoting offers that people can't access, or shouldn't be lining up for) will do more harm than good.

Instead of ads proselytizing about corporate values, now is the perfect time for companies to demonstrate what they stand for through practical action. Address consumers' demand for practical solutions, explain the steps you're taking — and potentially even the sacrifices you're making — to contribute to customers' safety, sanity and comfort, and contribute in whatever way your brand is uniquely suited to in order to handle the pandemic.

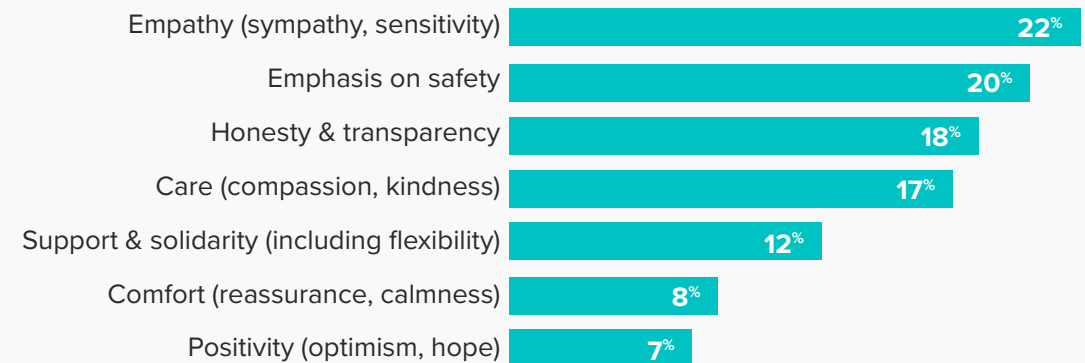
Companies prioritizing and protecting consumers when times are tough may not sell as many products today, but will collect dividends when normalcy returns.

How to say it

In an environment as sensitive as this, tone and context — how you communicate what you're communicating — are as important as the message and content. Just as consumers want brands to acknowledge the gravity of the situation when talking about impacts the pandemic is having on their company and products, most consumers providing guidance on preferred tone in brand communications are interested in knowing that you understand, empathize with, and are sensitive to their situation.

Awareness of the reality and repercussions consumers are living with — whether related to your brand's ability to provide consistent service or other matters of their everyday life — is critical. Beyond a slight desire for optimism, other more uplifting tones are of no interest: as we saw on this and previous page, humor and entertainment feel insensitive and irrelevant, with purchase consideration increasing by only 26% and 27% respectively for ads of that nature. Instead, to fill the void of a reliable and trusted entity, companies should strive to connect with the humans behind their customers: expressing concern, emphasizing safety, offering support, and bringing comfort.

Desired Tone of Brand Advertising



Messaging Should Reflect Our New Reality

WHAT TO SAY

1. Show how your company's products and services could be used to **combat the spread** of coronavirus
2. Show how your company can help **improve your customers' well-being**
3. Explain how you're **taking care of employees** and team members
4. Offer messages that are generally **comforting and optimistic**

WHAT TO AVOID

1. **Situation-insensitive** messages that fail to connect your product or service to the moment — don't downplay or distance yourself from the hardship people are feeling
2. **Situation-impractical** messages — don't try to offer services that people can't access
3. Anything explicitly **self-serving**

MORNING CONSULT POINT OF VIEW

To assess consumers' anticipated reactions in the context of real, in-market ads, [Morning Consult's ad tracker](#) leverages video dial test technology for real-time insight on how video creative, and key moments within that creative, resonate with target audiences.

The results are clear: how consumers say they'll react to certain advertising tropes indeed translates to how they actually do in the context of real ads. In the ads tested, consumers indicate that they would be more likely to buy from companies whose ads show how the company's products and services could be used to combat the spread of coronavirus (DoorDash), or those that show how the company's products and services could improve customers' comfort, happiness, and well-being during the pandemic (Hyundai, Ford). Demographic nuances on appeal of certain elements hold as well, particularly as it relates to generational preferences.

Importantly, as more values-driven and society-focused ads continue to surface, exclusive emphasis on products will feel increasingly out of place. Seventh Generation's dial test confirms this: consumer sentiment is fairly neutral until the ad's mention of "clean" at the 12-second mark, at which point it shifts positively — particularly among older generations who are more concerned about the pandemic and sensitive to protecting themselves from it.



DoorDash
"Open for Delivery"



SEE THE AD ▶

| Positive impression of the ad | More favorable towards advertiser | Increased trust in advertiser to do the right thing | More likely to purchase from advertiser | Is an optimistic ad | Is an empathetic ad | Is a comforting ad | Is a sentimental ad | Highly buzzworthy ad (would very likely talk about or share it) |
|-------------------------------|-----------------------------------|---|---|---------------------|---------------------|--------------------|---------------------|---|
| 83% | 69% | 66% | 61% | 69% | 65% | 69% | 54% | 44% |

This ad makes Gen Z both more likely to purchase from DoorDash and somewhat more favorable towards DoorDash than older generations; conversely, older generations find this ad notably more empathetic and more comforting than younger generations do.

Compared to males, 7% more females find this ad optimistic, 10% more find it empathetic, and 8% more find it comforting.

Hyundai
"Unpredictable"



SEE THE AD ▶

| | | | | | | | | |
|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| 78% | 68% | 69% | 42% | 65% | 66% | 67% | 46% | 46% |
|-----|-----|-----|-----|-----|-----|-----|-----|-----|

Gen Z is somewhat or much less likely to purchase from Hyundai than other generations, and are notably less likely than other generations — and the rest of the population — to find it empathetic or optimistic.

This ad especially resonates with females who have a 10% more favorable impression of Hyundai and 10% more trust in Hyundai due to this ad; they're also 14% more likely to find it empathetic, 9% more likely to find it comforting, 8% more likely to find it optimistic, and 8% more likely to find it sentimental.

Hispanics are more likely to have a positive impression of this ad and to see it as empathetic, optimistic, and sentimental; it also leaves Hispanics with much higher favorability for, trust of, and likelihood to purchase from Hyundai.

Ford
"Built to Lend a Hand"



SEE THE AD ▶

| | | | | | | | | |
|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| 75% | 64% | 66% | 47% | 65% | 65% | 66% | 46% | 45% |
|-----|-----|-----|-----|-----|-----|-----|-----|-----|

Gen Z finds this ad notably less optimistic or buzzworthy than other generations do, and is less likely than other generations to purchase from Ford due to this ad.

Compared to males, females have a 10% more favorable impression of this ad; they also find this ad 12% more comforting, 11% more empathetic, 9% more optimistic, 8% more sentimental, and 7% more buzzworthy.

This ad leaves Hispanics with a notably more positive impression than other sub-audiences; they are also much more likely to purchase from Ford due to this ad, and are notably more likely to find this ad comforting than the rest of the population.



Vegas

"The only thing that matters to us is..."



[SEE THE AD ▶](#)

| Positive impression of the ad | More favorable towards advertiser | Increased trust in advertiser to do the right thing | More likely to purchase from advertiser | Is an optimistic ad | Is an empathetic ad | Is a comforting ad | Is a sentimental ad | Highly buzzworthy ad (would very likely talk about or share it) |
|-------------------------------|-----------------------------------|---|---|---------------------|---------------------|--------------------|---------------------|---|
| 70% | 56% | 55% | 39% | 62% | 55% | 54% | 39% | 30% |

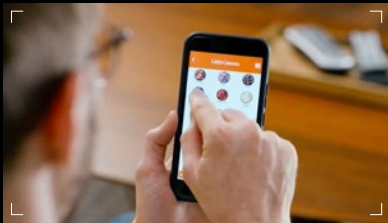
Due to this ad, younger generations — Gen Z in particular — trust Vegas more, are more favorable towards Vegas, and are more likely to spend on Vegas than older generations.

Again due to this ad, Hispanics trust Vegas significantly more than other ethnicities, and are more likely to spend on Vegas than the rest of the population.

Compared to males, females find this ad **12%** more empathetic; they also have a **9%** more favorable impression than males do. However, males are **7%** more likely to spend on Vegas than females are after seeing the ad.

Little Caesars

"Peace of Mind"



[SEE THE AD ▶](#)

| | | | | | | | | |
|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| 69% | 56% | 55% | 49% | 59% | 45% | 60% | 31% | 39% |
|-----|-----|-----|-----|-----|-----|-----|-----|-----|

Boomers are less likely than other generations to view the advertising company more favorably due to this ad.

Compared to males, females find this ad **11%** more optimistic, **9%** more empathetic, and **7%** more buzzworthy; after seeing this ad, they also have **7%** greater favorability toward Little Caesars and have **7%** higher trust in Little Caesars.

Due to this ad, Gen Z trusts Little Caesars more and is more likely to purchase from Little Caesars than older generations. Gen Z also finds this ad significantly more buzzworthy and sentimental than do other generations, Boomers in particular.

Seventh Generation

"Your Detergent May Contain"



[SEE THE AD ▶](#)

| | | | | | | | | |
|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| 49% | 44% | 45% | 38% | 39% | 29% | 39% | 15% | 27% |
|-----|-----|-----|-----|-----|-----|-----|-----|-----|

Due to this ad, Gen Z trusts Seventh Generation more than older generations do, but Boomers are significantly less likely to purchase from this company than are other generations.

Hispanics and African Americans express greater likelihood of buying from Seventh Generation due to this ad.



CONCLUSION

“A bond forged in times of difficulty can be the strongest bond of all, and if we want the public to trust us again, we need to demonstrate we are on their side when they need us.”

— Keith Weed, former CMO, Unilever

The coronavirus pandemic is likely to be among the most disruptive and demanding moments of our time. Brand reactions and contributions today will have real implications for affinity, consideration, and ultimately purchase in the future. In most cases, doing nothing signals insensitivity, lack of concern, and inflexibility — directly opposing the humanity, customer-centricity, and agility so commonly espoused by companies of all types.

Business as usual and customer experiences will necessarily shift, but maintaining cohesion around your brand experience is still very possible. In fact, this strained scenario allows for not only forging stronger ties, but also showcasing creativity and innovativeness in pursuit of better meeting consumer needs. It calls for shifting priorities from short-term business results to long-term brand equity, achieved by showing you understand your audience and are genuinely concerned with meeting their needs, regardless of whether that means shifting production lines for the good of society’s well-being, or staying open longer so the elderly can shop more safely. While this time is undeniably trying, it’s critical to

play the long game — and in doing so, read the signals of today to prepare for the new tomorrow we’ll find in consumers’ minds, hearts, and wallets when all this is over.

Companies aren't getting blamed for the situation we're in, but society expects them to be part of the solution. With only half of Americans trusting large corporations to lead us through this challenging time, brands face a fork in the road: they can either fall silent in the face of stormy weather, or capitalize on this unprecedented opportunity by leaning in for their stakeholders, helping to solve the situation, and ultimately laying the groundwork for the fertile ground sure to come after the storm passes.



MORNINGCONSULT.COM

LEARN MORE 