

## US brand marketing in a crisis:

Brands: It's time to find your voice



US Report

19 May 2020

## A light at the end of the lockdown?

In our first wave of US Covid-19 research, published [in PR Week](#), people were sharing their opinions as stay-at-home orders came into effect across most states in late March. In this latest wave, most consumers were several weeks into their lockdown routines and beginning to wonder: *What comes next?* We surveyed 2,000 US adults from April 9<sup>th</sup>-15<sup>th</sup> as [governors started to weigh what it would take to reopen states](#) and the public questioned what a slow return to 'normal' might entail.

In this piece, we re-examine the state of play, how consumers want brands to communicate, and which companies, in the eyes of consumers, have responded best (and worst) to the pandemic.

## Consumer state of mind

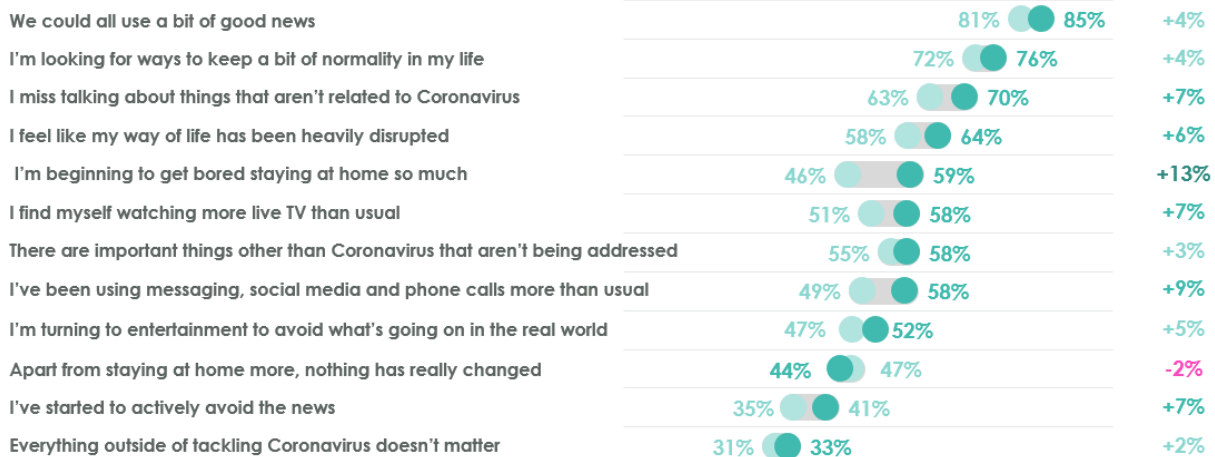
For many consumers, fatigue has set in, with a 7-point increase in people saying that they miss talking about things that aren't related to Coronavirus. Amazingly, and potentially linked to a rise in anxiety surrounding the pandemic, just over 4-in-10 (41%) report starting to actively avoid the news, up from 35%. This is markedly higher for 18-34 year olds (46%) compared to those aged of 55 (34%).

The largest increase however, is in the public feeling bored at home, which has rocketed from 46% to 59%.

## Lockdown intensified and hot-housed people's attitudes

To what extent do you agree with these statements? NET: Agree

● March 20-25<sup>th</sup> ● April 9<sup>th</sup>-15<sup>th</sup>



To what extent do you disagree or agree with the following statements?  
 c.2,000 US adults per wave

These shifts indicate a nation coming to terms with the prolonged effects of a lockdown. Early indicators are that it has hot-housed emotions such as worry and boredom. It is little surprise then that we've also seen a significant increase in people trying to escape the current reality by seeking solace through loved ones, watching more live TV across all age groups, and embracing social media to avoid the current crisis.

## Fading brands

Brands that depend on brick and mortar continue to bear the financial brunt of the lockdown, and face a major challenge — As they are forced to [pull back on marketing budgets](#), they risk falling out of consumers' minds.

### Industries most damaged by Covid-19 are far less vocal than at the beginning of the lockdown

How vocal are brands?



Thinking about the last week, do you feel like you've been hearing more or less than usual about the following types of companies?  
 c.2,000 US adults

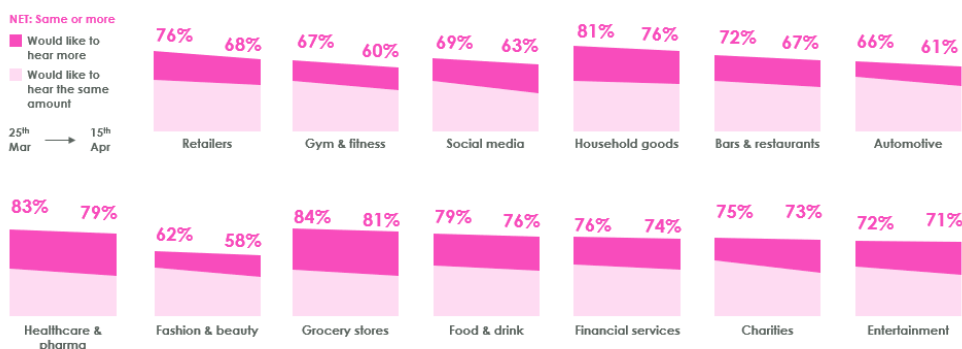


Though consumers are still largely hearing the same or more about brands across sectors compared to under normal circumstances, we see many sectors pulling back on communications. Brands in the worst-affected sectors (Hospitality, Fitness, and Retail) that had initially ramped up communications to address the crisis are starting to dial down their efforts as the purse strings on marketing budgets tighten. Meanwhile, consumers are hearing more from charitable organizations as they've had time to react to the crisis.

The brands that can afford to, should continue connecting with their audience — Despite a small downtick, the vast majority of consumers still do want to hear from them right now.

### Most consumers still do want to hear from brands in the midst of the crisis

How vocal should brands be?



And would you like to hear more or less from these types of company at this current time?  
 c.2,000 US adults



## Winners in public opinion

Most sectors are perceived to have responded better to the crisis than a few weeks prior, with some notable winners.



**Grocery stores** continue to be the sector perceived as having reacted most effectively to the crisis, with 68% of Americans saying they've responded well, up from 62% at last count. Half of the top 10 brands respondents brought up as having responded best to the crisis sell groceries, including **Kroger (#3)**, **Publix (#8)**, and **HEB (#9)**. Though **Walmart (#1)** and **Amazon (#2)** are the *most* frequently mentioned brands that consumers think have responded best to the crisis, they have drawn significant controversy over lack of protections for workers, so almost as many respondents think they have responded poorly.

Alongside Walmart, Amazon, and Kroger, **Apple (#4)** and **Nike (#5)** round out the top 5 brands consumers say have responded best to the crisis. Though Apple has taken impressive steps to address the pandemic, from [collaborating with Google to develop a contact tracking system](#) to [donating a portion of sales to relief funds](#), the brand gets a boost in public opinion from many citing their iPhones as trusted companions for entertainment and connection during social distancing. The Nike brand continues to benefit from its ability to [pivot with agility from manufacturing sneakers to PPE](#) and its ability to [harness its brand for a powerful coronavirus PSA](#).

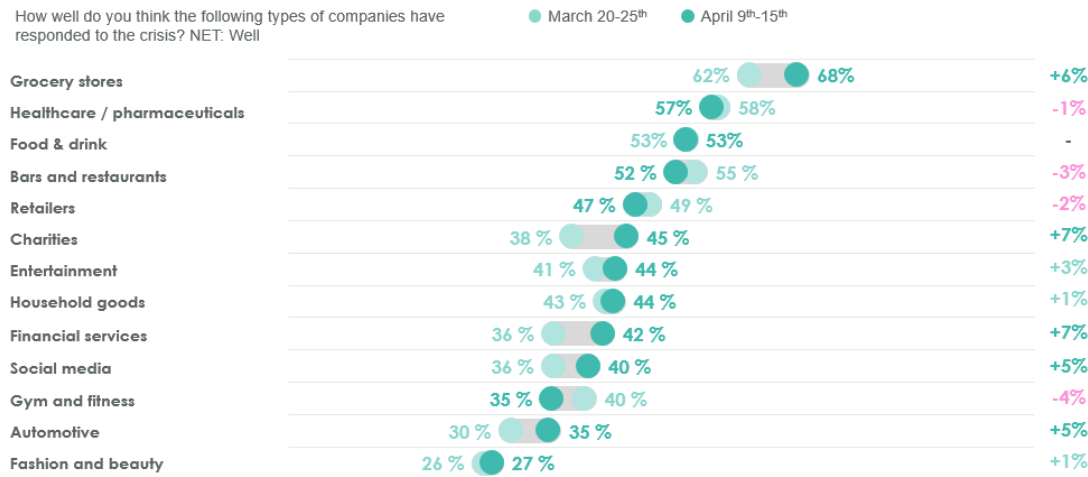
Now having had time to respond to the crisis, **Charities** have seen a 7 percentage point increase in consumers' belief that they have responded well to the crisis—45% of Americans now say they've responded well, up from 38% a few weeks back. For instance, [World Central Kitchen](#), a charity founded in 2010 by [celebrity chef José Andrés](#) committed to bringing meals to vulnerable communities, received a few notable mentions among our respondents for its [#ChefsforAmerica](#) initiative—activating restaurants and kitchens to feed communities affected by Covid-19 while simultaneously supporting the restaurant industry.

**Financial Services** companies are also perceived to be responding significantly better to the crisis than a few weeks prior, with 42% now saying they've responded well up from 36%. Many of our respondents have praised some of the more altruistic initiatives in the industry—[Insurance companies](#) like USAA and AllState are offering grace periods and payment assistance, while continuing to ensure coverage.

**So what do these lauded brands and sectors have in common?** They are perceived to be jumping into action to take care of their employees and their customers. However, some of these brands have benefited from a halo effect of simply being highly relevant to this crisis (e.g., grocery stores) and *being there* for consumers in their time of need (e.g., Apple iPhones).

## More brands now perceived to have responded well

How well do you think the following types of companies have responded to the crisis? NET: Well



How well do you think the following types of companies have responded to the crisis? c.2,000 US adults per wave



## Brands that have struggled...

As consumers have started to hear less from bars & restaurants, gyms, and retailers, these sectors have been perceived as responding less well to the crisis compared to a few weeks prior.

We also asked consumers to tell us which specific brands they thought had responded worst to the crisis. The most mentioned were:



**3M**, a key producer of N95 masks, was called out the most by our respondents as the brand with the worst response to the crisis. The company has been caught in a political storm—[criticized by the Trump administration](#) for exporting masks to Canada and Latin America and for allegedly fostering price gouging. [3M has defended its response to the crisis](#) saying it has doubled its global production of N95 masks and that it should not stop exporting US-made masks to other countries on humanitarian grounds.



**Hobby Lobby** has been widely critiqued for [keeping its craft stores open in the midst of the pandemic, despite being deemed non-essential](#).



**Facebook** has been under attack for [struggling to contain the spread of misinformation on Coronavirus](#). The recent string of [“Liberate” protests](#) which violated social distancing orders in various states were also organized, in part, on Facebook. Despite these challenges to its public image, the company has been getting creative to help fight the pandemic, [launching a symptom tracking partnership with Carnegie Mellon](#).



**McDonald's** is [seeing backlash for not doing enough to protect workers](#) under its franchise model and for its attempt to promote social distancing by [separating the golden arches in its logo](#), a marketing move perceived as opportunistic.

**GameStop** GameStop, the world’s largest video game retailer, [pushed to remain open](#) through late March arguing it was “essential” while failing to provide employees with adequate protective equipment.

**What can we learn from their mistakes?** Companies like Hobby Lobby and GameStop that pushed to remain open, endangering their employees, have paid the price in brand equity. The biggest faux pas, in this painful time for so many, is to be perceived as not taking the issue seriously enough. Consumers aren’t looking kindly on big corporations perceived as putting profit above people’s health and safety.

### It’s not just what you say, but how you say it

More Americans now feel brands are ‘jumping on the bandwagon’ with their coronavirus messaging, increasing from 57% to 64% in the span of a few weeks. Similarly, almost half (49%) now feel brands are trying to take advantage of the situation by pushing certain promotions, up from 42%.

Though lockdown measures are slowly being relaxed in several states, hardships caused by the pandemic are far from over, so sensitive communications remain essential — Across all but one industry surveyed (Entertainment), consumers prefer that brands adopt a serious tone rather than a playful one, reflecting the severity of the situation. On average across sectors, consumers are seeking communications from brands that are **informative (71%), serious (65%), educational (64%) and professional (54%), but also inspiring (54%).**

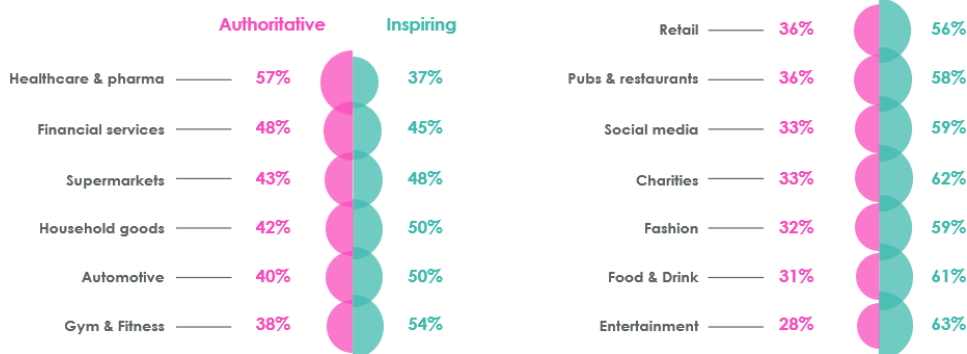
The extent to which these differ by sector, however, is extensive.

### Seeking Inspiration

As boredom of the lockdown grows, demand for inspiring content is fertile ground for most sectors, especially those where consumers can still choose whether to engage with brands, rather than needing to depend upon them. The only two sectors where consumers want brands to be more authoritative than inspiring in their tone are Financial Services and Healthcare—After all, Covid-19 has wreaked havoc on many Americans’ finances and healthcare routines, so it is no wonder they look to these sectors for firm guidance at this time.

### Not all comms need to be top down, inspiration is a fertile ground for many sectors

What tone of voice do consumers want to hear from different sectors?  
9<sup>th</sup> April – 15<sup>th</sup> April



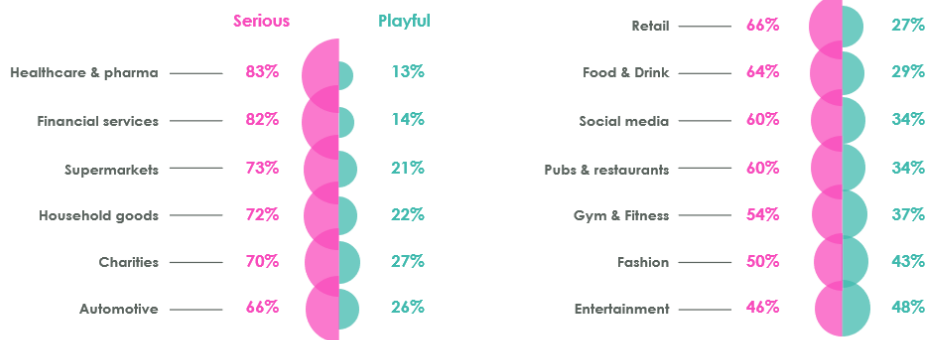
When thinking about the content of communications from companies in the [X] sector, would you like it to be...  
2,000 US adults

## Serious>Playful

As anticipated, sectors offering essential services such as pharmaceuticals skew heavily towards scientific, detailed and authoritative messaging as consumers seek reassurance and guidance. Traditionally conservative industries such as Financial Services over-index on the need to adopt a professional and informative tone.

Brand tone expected to reflect severity of the situation, especially those in the eye of the storm

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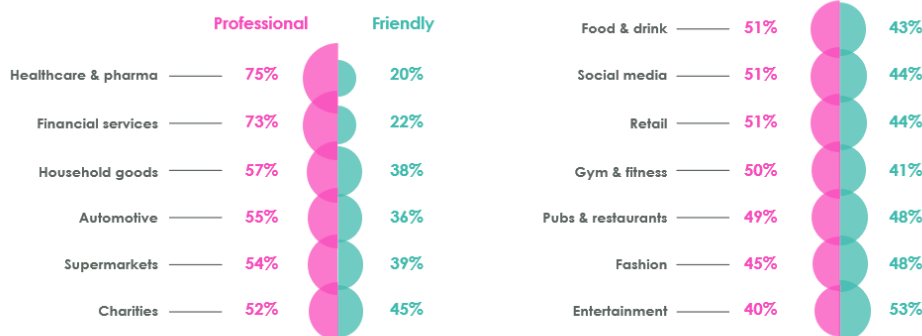


## Treading Lightly

The trade-off between communication styles remains deeply divided with sectors conventionally associated with more friendly, approachable messaging suddenly required to adopt a more professional tone. For Supermarkets in particular, the transition from a business whose content is often based around notions of family, inspiration and togetherness, to a provider of essential (and sometimes rationed) goods has split consumers. Pre-corona associations of how brands and organisations have traditionally engaged with their audiences have been challenged, but not forgotten.

Many sectors still have scope to play on their pre-Corona 'friendly' personality

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When thinking about the content of communications from companies in the [X] sector, would you like it to be...  
 2,000 US adults



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## Generational Divide

Differences in age continue to reflect pre-pandemic marketing preferences with younger generations tending to endorse more light-hearted, playful communications.

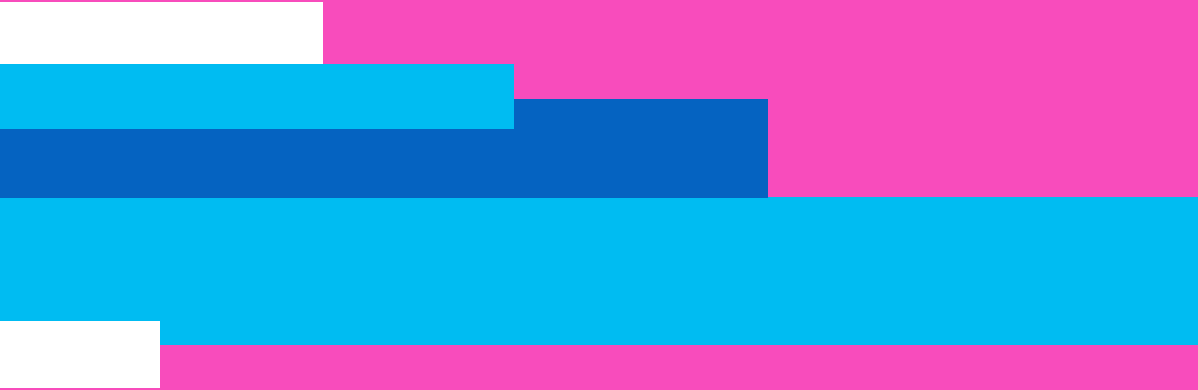
## One final thought

We know that there's a lot of information out there about what brands should and shouldn't be doing and saying. And if we're honest, it can seem pretty overwhelming. So, if you take only one thing away from this report we want it to be this:

Now isn't the time for brands to self-isolate in their boardrooms. More than ever this is the time to reach out to the public by every channel available. People are hungry for information, for reassurance, for hope and for distraction. If your brand can fulfil any one of these desires, now is the time to try – and the public will thank you for it.

If you'd like to know more about what people expect of your brand or how consumer's attitudes and behaviours are changing, get in touch: [hello@opinium.com](mailto:hello@opinium.com)





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