

Brand Reckoning 2020:

How Crisis Culture Is Redefining Consumer Behavior, Loyalty and Values

A look at how COVID-19 and events highlighting systemic racism are impacting how consumers view brands and corporations.

2020 is making Americans take a hard look at what really matters to them.

- 86%** Now consider mental health more important
- 74%** Say COVID-19 has shown how unnecessary some past purchases were
- 62%** Say the pandemic has completely disrupted their 5-year plans

COVID-19 and social justice reform are igniting a radical rethinking of ethics and purpose for brands.

- 45%** Say COVID-19 has already changed their brand preferences; 62% expect permanent shifts
- 88%** Believe it's now more important that companies behave ethically
- 74%** Cite Black Lives Matter protests as a reason for supporting businesses that improve diversity and inclusion

How and who are consumers evolving?


We've aligned these evolutions in consumer behavior to specific personas. Based on how open they are to reengaging with the outside world and how much their values have changed during this phase of nonstop disruption, consumers can be divided into one of four types.



RETRO REENGAGERS
Ready to return to the world as it was

33% of consumers
Most likely to feel very comfortable visiting shared spaces, most likely to believe we shouldn't have to wear masks in public, less likely to prioritize diversity and inclusion in choosing brands.

| | |
|------------------------|--------------|
| OPENNESS TO REENGAGE | HIGH |
| REDEFINITION OF VALUES | LOW |
| POLITICAL LEANING | CONSERVATIVE |
| INCOME LEVEL | HIGH |



OPEN-MINDED EXPLORERS
Have new priorities as they return to a world reopening

22% of consumers
Most likely to change brand preference post-COVID, more likely to be urban and educated, more likely to be influenced by advertisers, social media, and bloggers.

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|------------------------|-----------|
| OPENNESS TO REENGAGE | HIGH |
| REDEFINITION OF VALUES | HIGH |
| POLITICAL LEANING | POLARIZED |
| INCOME LEVEL | HIGHEST |



WORRIED WITHHOLDERS
Not easily influenced: they prefer their comfort zone

20% of consumers
The oldest persona, more likely to feel somewhat uncomfortable visiting shared spaces, least likely to have changed their brand preference, considers advertising less influential now than prior to COVID.

| | |
|------------------------|---------------|
| OPENNESS TO REENGAGE | LOW |
| REDEFINITION OF VALUES | LOW |
| POLITICAL LEANING | CENTRIST |
| INCOME LEVEL | BELOW AVERAGE |



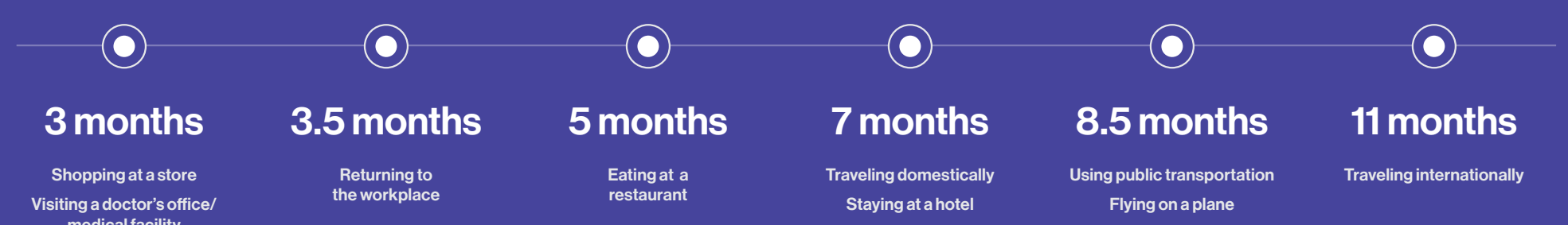
CAUTIOUS QUESTIONERS
Keeping their distance until they know more

25% of consumers
Twice as likely to feel very uncomfortable visiting shared spaces, most likely to have an underlying health risk, most likely to feel positive about companies prioritizing diversity and inclusion in the wake of Black Lives Matter protests.

| | |
|------------------------|---------------|
| OPENNESS TO REENGAGE | LOW |
| REDEFINITION OF VALUES | HIGH |
| POLITICAL LEANING | LIBERAL |
| INCOME LEVEL | BELOW AVERAGE |

When will consumers be ready to reengage with brands?

Surveyed three months into the crisis, American consumers are still not completely comfortable returning to their pre-COVID lives and activities. The soonest they will feel comfortable is three months out, a pause that stretches to almost a year for international travel.



Find out more about our methodology and how we can help your brand through this time.

How were the crisis culture personas determined? How have protests against systemic racism added to the culture crisis? And how does this Brand Reckoning affect consumer engagement? Take a deeper dive at [Ketchum.com/covid-consumer-survey](https://ketchum.com/covid-consumer-survey).

Background/Methodology: Data based on results of a nationally representative online survey of 3,883 Americans aged 18+, conducted by Ketchum Analytics and fielded 6/14 - 6/23/2020.