

**GLOBAL CONSUMER TRENDS**  
COVID-19 EDITION

**ADVERTISING IN  
THE NEW NORMAL – PART 1**



# **WALKING A FINE LINE: BRAND MESSAGING DURING THE CRISIS**





# EXECUTIVE SUMMARY

**The COVID-19 pandemic has radically changed nearly every aspect of the consumer experience.** As we move into the next phase of the pandemic, brands will need to balance the desire to encourage consumers to spend and purchase with a recognition that we are all living in a *New Normal*.

Our two-part series, *Global Consumer Trends COVID-19 Edition: Advertising in the New Normal*, focuses on how brands should be advertising during the pandemic, what messages – and actions – will be most impactful, and whether brands need to change their approach because of COVID-19-influenced media consumption habits.

Leveraging our global scale, deep consumer relationships, and the largest fully-permissioned first-party data set in the industry, **this report explores changing consumer behaviors and how brands need to pivot in response to these changes.**

IN THE FIRST PART OF THIS SERIES, *WALKING A FINE LINE: BRAND MESSAGING DURING THE CRISIS*, **WE EXPLORE THESE KEY TAKEAWAYS:**



## **CONSUMERS DON'T MIND BRANDS ADVERTISING DURING THE PANDEMIC**

Almost half of all respondents agreed that it's fine for brands to continue advertising during the pandemic.



## **BRANDS SHOULD ACKNOWLEDGE THE CRISIS AND CONTRIBUTE TO THE OVERALL SOLUTIONS**

Ads that fail to acknowledge the crisis were unpopular with consumers; more popular were those that leverage their strength and contribute to the “needs of the crisis” while being careful not to be seen as “taking advantage” of the pandemic.



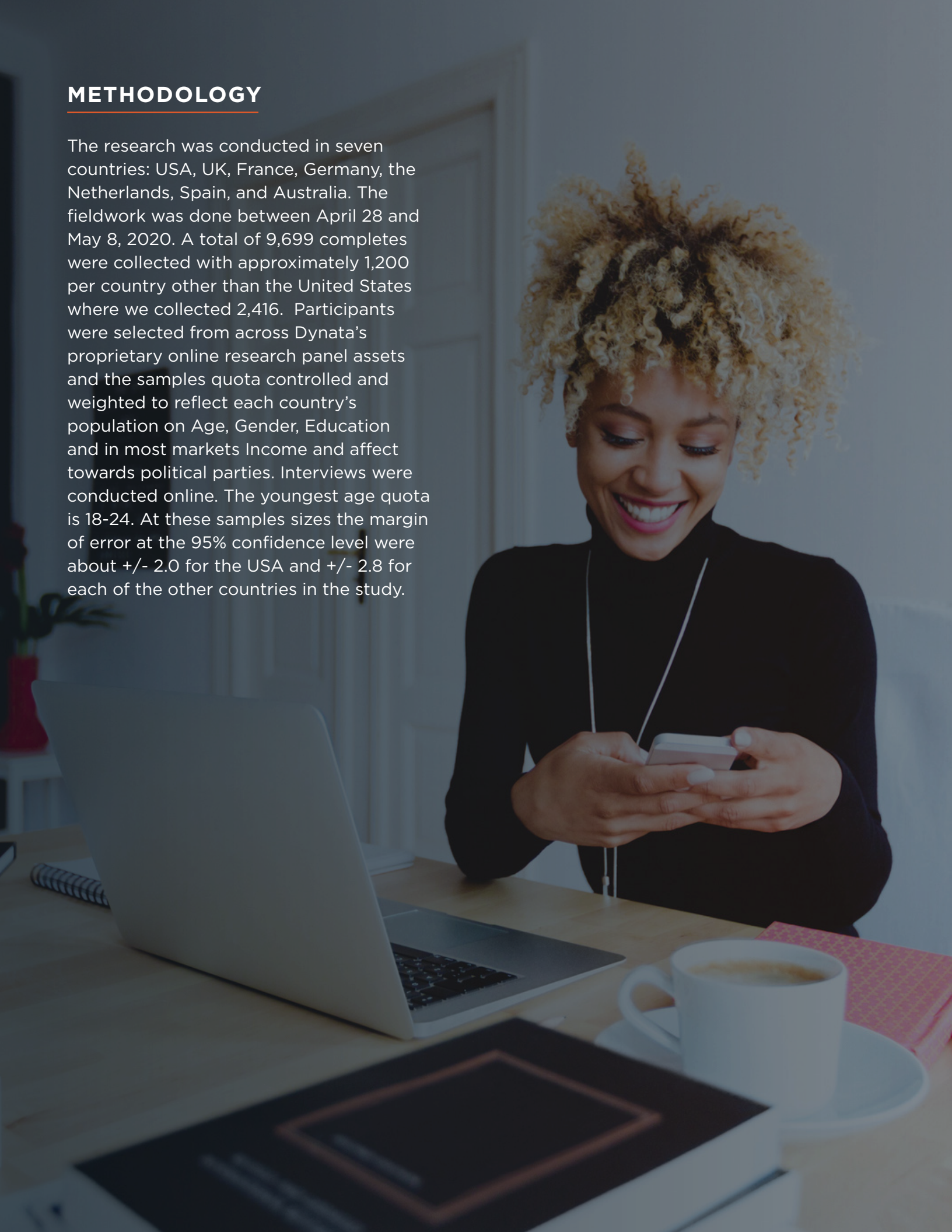
## **ACTIONS, NOT WORDS, WILL MAINTAIN CONSUMER LOYALTY**

Consumers reported they would be more loyal to brands who act altruistically during the pandemic, from paying employees unable to perform their jobs (54%) to donating personal protective equipment (54%) and feeding healthcare workers/ first responders (53%).



## METHODOLOGY

The research was conducted in seven countries: USA, UK, France, Germany, the Netherlands, Spain, and Australia. The fieldwork was done between April 28 and May 8, 2020. A total of 9,699 completes were collected with approximately 1,200 per country other than the United States where we collected 2,416. Participants were selected from across Dynata's proprietary online research panel assets and the samples quota controlled and weighted to reflect each country's population on Age, Gender, Education and in most markets Income and affect towards political parties. Interviews were conducted online. The youngest age quota is 18-24. At these samples sizes the margin of error at the 95% confidence level were about +/- 2.0 for the USA and +/- 2.8 for each of the other countries in the study.



## IS IT OK TO ADVERTISE DURING THE PANDEMIC?

CONSUMERS ARE OK WITH BRANDS CONTINUING TO ADVERTISE, BUT THEY NEED TO BE SELF-AWARE OF THE VALUE OF THEIR PRODUCTS AND SERVICES DURING THE PANDEMIC.



### IMPENDING IMPACT

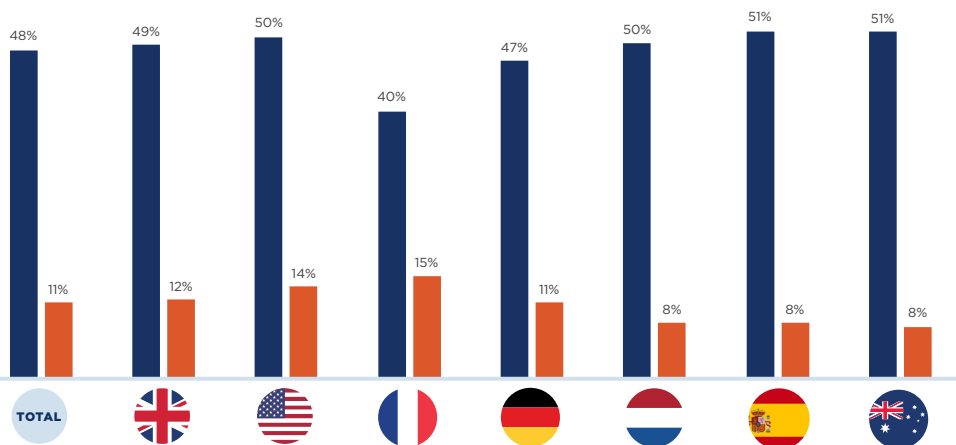
How can brands with non-essential offerings still reach consumers and communicate their value? How will this threshold change over the coming months? Will brands that don't acknowledge the pandemic face potential customer losses and publicity backlash in the future?

The biggest questions on the minds of marketers today are how to change their messaging and whether to increase advertising, go about “business as usual” or cut back. **Across the countries surveyed, 49% say it's fine for brands to continue advertising, with just 11% disagreeing with that statement.** France had the highest number of people that disagreed with brands advertising during the pandemic with 15% saying they disagreed with this.

Interestingly, a third believe that brands with non-pandemic related products and services should not be advertising during this time. Consumers in the UK feel the strongest about this, with 44% agreeing, followed by the Netherlands (35%) and the USA (34%). **Those brands that do advertise should be mindful about acknowledging the pandemic, with 41% saying they prefer ads that recognize the current crisis.**

It's fine for brands to continue advertising during the current pandemic

● Strongly/somewhat agree  
● Strongly/somewhat disagree

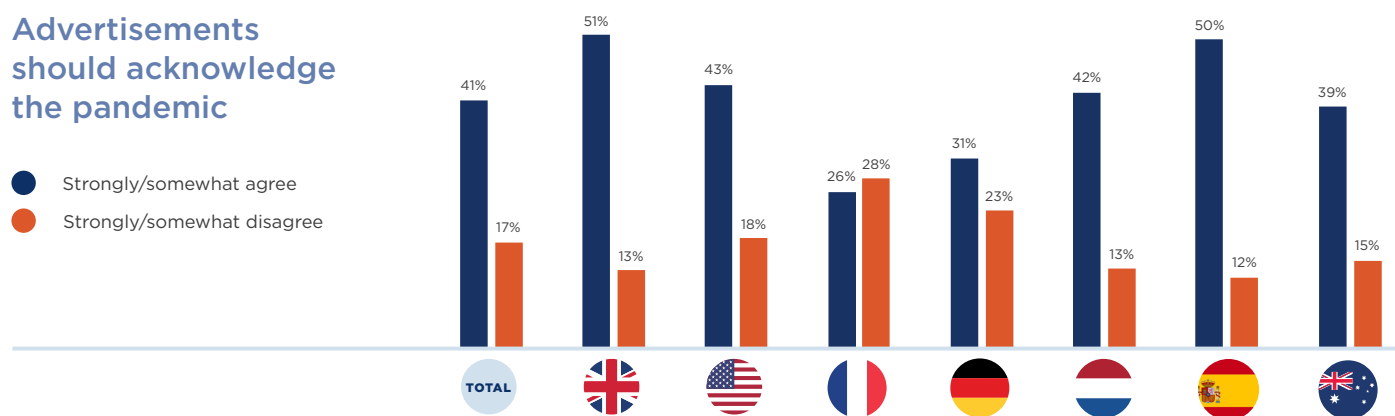




Overall, most consumers aren't opposed to brands advertising during the pandemic, however, those brands that aren't deemed essential should carefully consider their messaging. Brands that acknowledge the pandemic in their advertising will connect better with their audiences and be perceived more positively.

### Advertisements should acknowledge the pandemic

- Strongly/somewhat agree
- Strongly/somewhat disagree



## CONVEYING THE RIGHT MESSAGE

MESSAGES THAT DEMONSTRATE AN “ABOVE AND BEYOND” MESSAGE SEEM TO BE LANDING WELL. THOSE THAT FAIL TO ACKNOWLEDGE THE CRISIS OR COMMUNICATE UNRELATED HEALTH AND SAFETY ISSUES ARE LEAST POPULAR. CONSUMERS ARE WARY OF COMPANIES TAKING ADVANTAGE OF THE PANDEMIC TO MARKET AND SELL MORE.



### IMPENDING IMPACT

How do brands demonstrate authenticity and empathy and stand out when everyone seems to be communicating the same sentiments? What are the new triggers for positive and negative reactions in consumers? How do brands find the right balance of marketing their solutions and contributing to the greater good, and how will that balance continue to evolve?

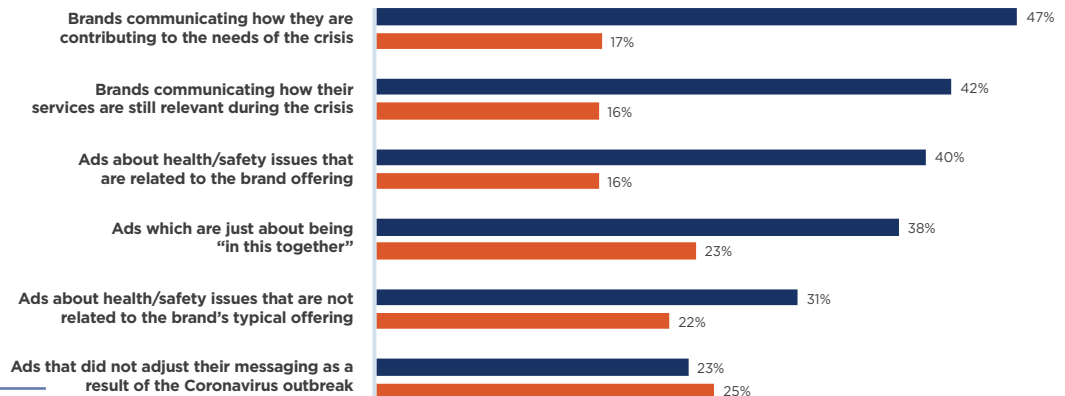
Alongside gaining the “social permission” to advertise, getting the message right is the most important challenge of advertising during the current crisis. Doing so can open doors to new customers, keep your brand afloat during a difficult time and increase customer loyalty. On the other hand, communicating a message that consumers find unappealing, inappropriate or insensitive could tarnish your brand and leave lasting affects after the pandemic is over.

When asked which messages resonate most during the pandemic, **47% said ads communicating**

**how a brand is contributing to the needs of the crisis were among the most appealing.** Again, this message resonated particularly well with consumers in the UK and Spain, with more than half agreeing this message was appealing. **Ads that communicated how a brand’s products and services were still relevant during the pandemic also were rated as popular, with 42% finding ads of this nature appealing.** However, brands should err on the side of caution, as 25% of respondents, globally, said that ads that did not adjust their messaging were unappealing, led by a high of 31% in the UK and 27% in the USA.

### How appealing are these approaches?

- Appealing
- Unappealing





Another message that didn't resonate well with consumers is when brands try to convey that "we are all in this together" with 23% finding this unappealing. This sentiment was the highest in the Netherlands (28%) followed by Australia and the UK (both at 25%), perhaps a reflection of brands using the message too much ("message fatigue") or using it to market and sell, taking advantage of the current crisis. **A note of caution to brands – 48% of respondents agreed that companies are "taking advantage of the pandemic to sell more stuff," led by Spain at 57% and the UK at 55%.**

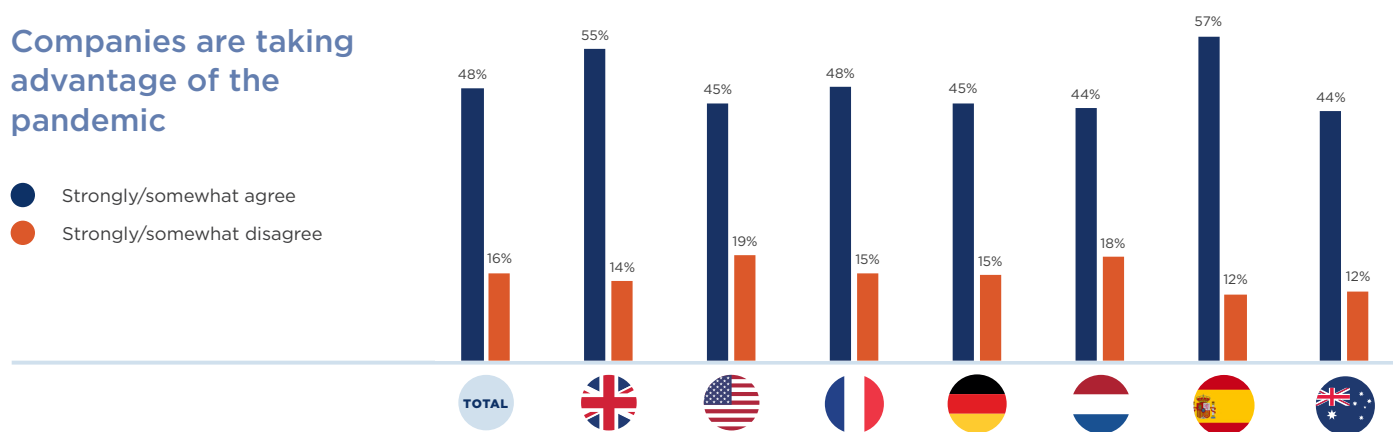
Due to the pandemic, consumers are also responding differently to themes and images, affecting how well they will resonate with a brand's ad. A third of people across all countries surveyed like ads that remind them of life before the pandemic. This is particularly true in Spain (42%), the UK (38%) and the USA (36%), all of which have

experienced strict lockdown measures or social restrictions. Consumers also responded positively to ads that convey that brands "care about me," with 37% agreeing with that statement. In this current climate, brands should also be mindful about using people seen as vulnerable to the virus, such as the sick and elderly, as 40% of consumers agree that it reminds them of the pandemic. Again, this sentiment is strongest in Spain (47%), the UK (44%) and the USA (41%) perhaps due to the high mortality rates in these countries.

**Another theme that doesn't resonate well with consumers is people close together in ads while many of us are social-distancing, with 38% of people agreeing they don't like seeing that.** With this in mind, brands should avoid advertisements featuring concerts, large family gatherings and sporting events.

### Companies are taking advantage of the pandemic

● Strongly/somewhat agree  
● Strongly/somewhat disagree



**Overall, when thinking about advertising, brands should aim to be authentic when speaking to their audiences. Successful brands will think about their value proposition as a business and how they differentiate themselves, while communicating how their offerings are still relevant.** Although many brands have been hit hard during the pandemic, especially those in the travel and hospitality industries, it is also an opportunity for marketers to focus on brand building, as those that do will come out on top as we emerge from the pandemic.





## CORPORATE ACTIONS THAT WILL HAVE THE MOST IMPACT

ADVERTISING THE RIGHT MESSAGE IS IMPORTANT, BUT CONSUMERS ALSO WANT TO SEE BRANDS ACTING TO HELP IN THE PANDEMIC, FROM “HERO PAY” EFFORTS TO FOOD AND PPE DONATIONS.



### IMPENDING IMPACT

Will the response from brands during the pandemic further accelerate social and corporate responsibility efforts? If so, what is the best way to sensitively and empathetically communicate those efforts in advertising? And will those efforts drive greater customer loyalty, market share and potentially revenue?

During this time of crisis, many brands have responded quickly by introducing initiatives focused on helping global, national and local organizations on the frontlines of the pandemic. Donating money to Coronavirus relief charities, providing free services and resources, and donating Personal Protective Equipment (PPE) and other essential healthcare equipment are proving resonant with consumers. Similar to getting the message right, it's important to understand the social actions that resonate most with your audience, borne out by our research demonstrating that some social initiatives can position brands in a more positive light and increase consumer loyalty.

Across all countries surveyed, **consumers indicated that they will be more loyal to a brand once the pandemic is over if the brand continues to pay employees that are no longer able to work, with 54% responding they will be somewhat or much more loyal to brands that do so.** Additionally, consumers agreed that brands taking other employee- or inwardly-focused activities stood poised to gain additional

customer loyalty, from senior executives forgoing portions of their salary (50%) to converting their manufacturing resources to help produce protective items (52%).

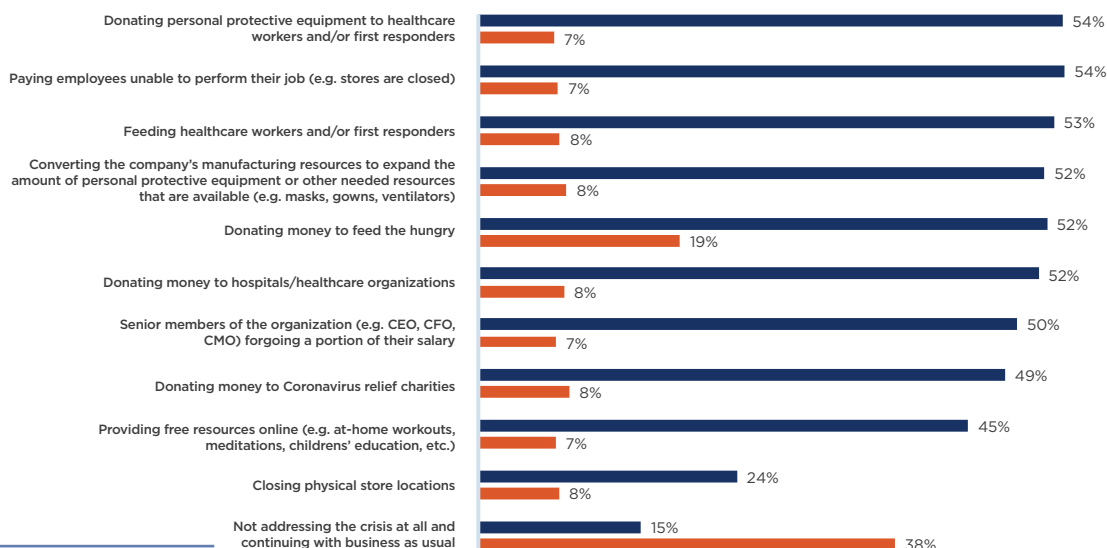
**Other popular social initiatives that may increase customer loyalty after the pandemic include donating PPEs to healthcare workers and first responders, with 54% agreeing they would be more loyal to brands that respond this way.** Donations to food banks along with donating money to hospitals and healthcare organizations were popular as well, at 52% each.





## Corporate actions contributing to brand loyalty

● More Loyal  
● Less Loyal



These findings are consistent across most countries with donating PPE and other essential equipment being most favorable in Spain while paying employees that are unable to perform their jobs had the most impact on customer loyalty in Australia. Interestingly, consumers in the UK are more likely to be more loyal to brands that are more socially conscious during the pandemic than consumers in other markets. On the contrary, social initiatives have the least influence on customer loyalty in Germany.

Finally, brands that are making some of their services and resources available for free – at-home workouts, meditation apps, educational/training courses, etc. – have an opportunity to create higher levels of consumer loyalty, with

45% globally agreeing with that statement. Of note, this spikes to 60% in the UK and 58% in the Netherlands.

One of the biggest mistakes a brand can make during this time is not addressing the crisis at all. **38% of consumers said that their loyalty would be negatively impacted for brands that take no social action during the pandemic. This was even larger in the UK and Spain at 51% each.**

For continued coverage of the latest global consumer trends, and additional insights on what these trends reveal about our New Normal, [visit our COVID-19 Insights Hub.](#)





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