

Consumer Sentiment About COVID-19: What They Expect Of Companies

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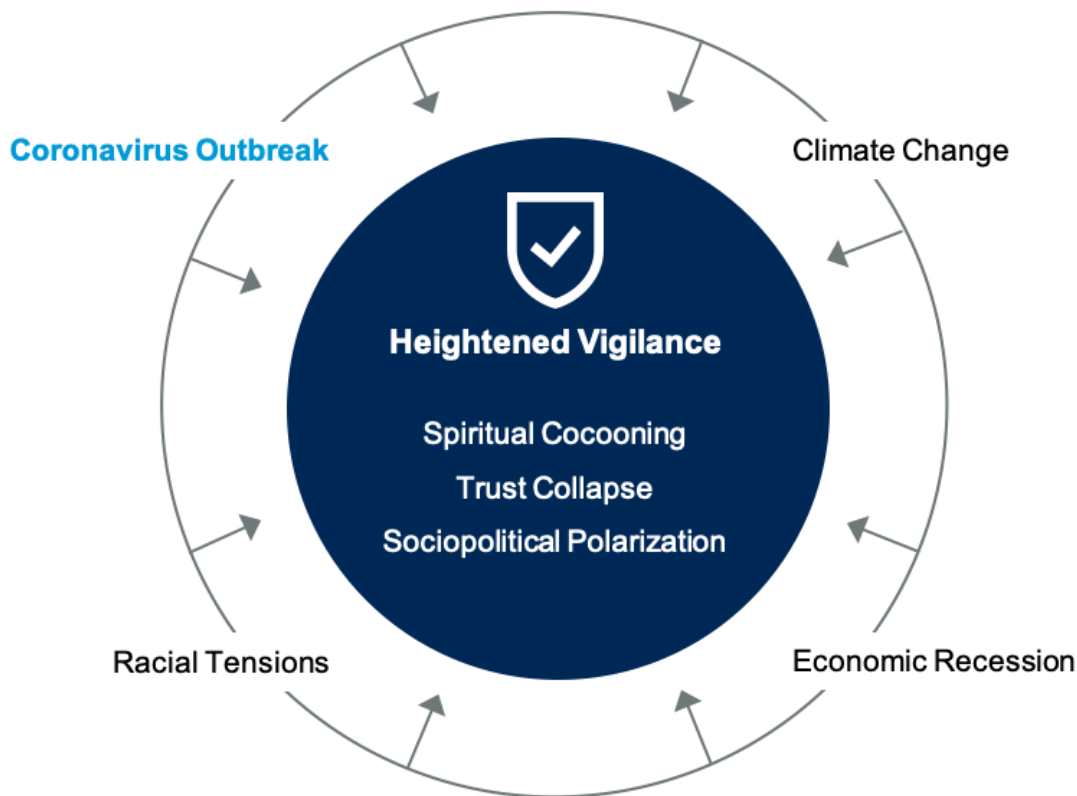
In the face of a coronavirus-driven culture shift, marketing leaders must adjust tone and tactics to better align with consumer expectations and fears. Consumers' concerns about the coronavirus must be understood in the context of existing trends around security and safety.

Introduction

Coronavirus (COVID-19) landed in the midst of a U.S. population already grappling with socioeconomic factors that have frayed the seams of trust and sent people chasing after security and safety. Many consumers were already feeling anxious by the time awareness of the virus mainstreamed in the population. We can look to data about these concerned consumers to tell us how consumers as a whole may think and act in the face of an accelerating public health crisis. What we already know about anxious and comfort-seeking consumers can help marketing leaders understand consumer behavior in the face of coronavirus and determine what to do next.

This piece of research aims to capture a snapshot of consumer attitude and sentiment around coronavirus as of early March 2020 (to be updated regularly over time). Here, we have gathered evidence from our Gartner Consumer Community (GCC) panel on what consumers are most worried about now and for the future. We also provide insight into which groups are most concerned, to what degree they hold companies responsible for the health and well-being of consumers, and which specific actions they expect companies to take. It's important for marketing leaders to understand the cultural context into which coronavirus unfolds (see Figure 1).

Coronavirus Outbreak in the Context of the Cultural Zeitgeist



Source: Gartner
ID: 722085

Figure 1. Coronavirus Outbreak Is Reinforcing Preexisting Social and Cultural Patterns

This moment presents opportunities and challenges for brands. Consumer trust – in all institutions, including companies – has deteriorated considerably and is exacerbated by disruption (see [“The Dramatic Collapse of Consumer Trust Is Bad for Brands and Challenging for Marketing Leaders”](#)). Consumers have little faith that the healthcare system, specifically, will work as they need it to (see [“Consumer Insight: Pursuing Healthcare That Isn’t There”](#)). They also have a deep desire for comfort and security (see Figure 2).¹ Consumers want to create a protected, sheltered environment. We call it spiritual cocooning (see [“U.S. Top Trends 2020: Values Backdrop”](#)), and concerned consumers exhibit this, and burgeoning distrust, in spades.¹ It is within this long-simmering yet newly urgent environment that marketers can demonstrate leadership via four actions. They can solve for specific consumer quandaries, message toward values that matter most to worried consumers, provide products and services that hearten people in times of panic, and avoid the temptation to bombard consumers with information or to inadvertently exploit the vulnerable.

Key Ascending Values

Value		Rank in 2019	Rank Change, 2018-2019	Rank Change, 2014-2019	Rank Change, 2010-2019	Percentage-Point Change Since 2010 ^a
relaxation	I greatly desire and search for those occasions when I can just rest and relax.	17	+5	+10	+20	+6 pts.
safety	I actively seek ways to keep myself, my family and my friends safe from harm or danger.	18	-2	+4	+9	+2 pts.
serenity	I seek out calm, peaceful and tranquil surroundings and situations.	21	+2	+22	+13	+3 pts.
security	I need to feel secure and protected.	29	+10	+20	+21	+6 pts.
simplicity	I strive to live a simple and uncluttered life.	33	+5	+14	+10	+3 pts.

Source: Gartner Consumer Values and Lifestyle Survey (2010-2019)

^a Rank changes shown above are based on the percentage of consumers citing "top-two box" agreement on a 7-point scale, where 1 is "does not describe me at all" and 7 is "describes me exactly."
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Figure 2. Consumers Continue to Crave Respite and Escape

Analysis

Consumers' Biggest Concerns Are Future-Forward and Big-Picture, But Consumers Expect Online Shopping Reliability

In early March 2020, the most common woe experienced by consumers as a direct result of coronavirus was the diminished value of personal investments, followed by the occasional sight of empty store shelves (see Figure 3).² But the number of consumers who experienced these present-day problems pales in comparison to the size of the group of consumers who told us they worry about bigger issues surfacing in the future.²

Concern for the economy tops the list, but second to that is the notion that other people, going forward, won't act in the interest of the community as a whole. This could refer to any among a slew of widely reported behaviors that touch on issues related to income inequality and resilient populations endangering more vulnerable ones. These include people continuing to work in service industry jobs while sick;³ having the means to spend money on marked-up goods, high-end protective gear or luxury seclusion;⁴ failing to "socially distance" from public places;⁵ or engaging in prejudicial or xenophobic behavior.⁶

Consumers today are far more concerned about brick-and-mortar stores running out of stock than they are about online product availability,² which suggests an overall elevated expectation from consumers for the supply chain reliability of brands with digital commerce capabilities. Digital marketing leaders for online retailers must prepare to assuage the concerns of especially upset consumers, if and when inventory dries up (see Table 1). Limiting purchase quantities is one way

for a brand to simultaneously counter consumer worries about the unchecked hoarding by others, and to keep the marketplace functioning. “I wish people had started [rationing] sooner and talking more about it because I think it would create a lot of comfort among consumers,” said Kelly Goldsmith, an associate professor of marketing at Vanderbilt University who has studied consumer behaviors around scarcity. ⁷

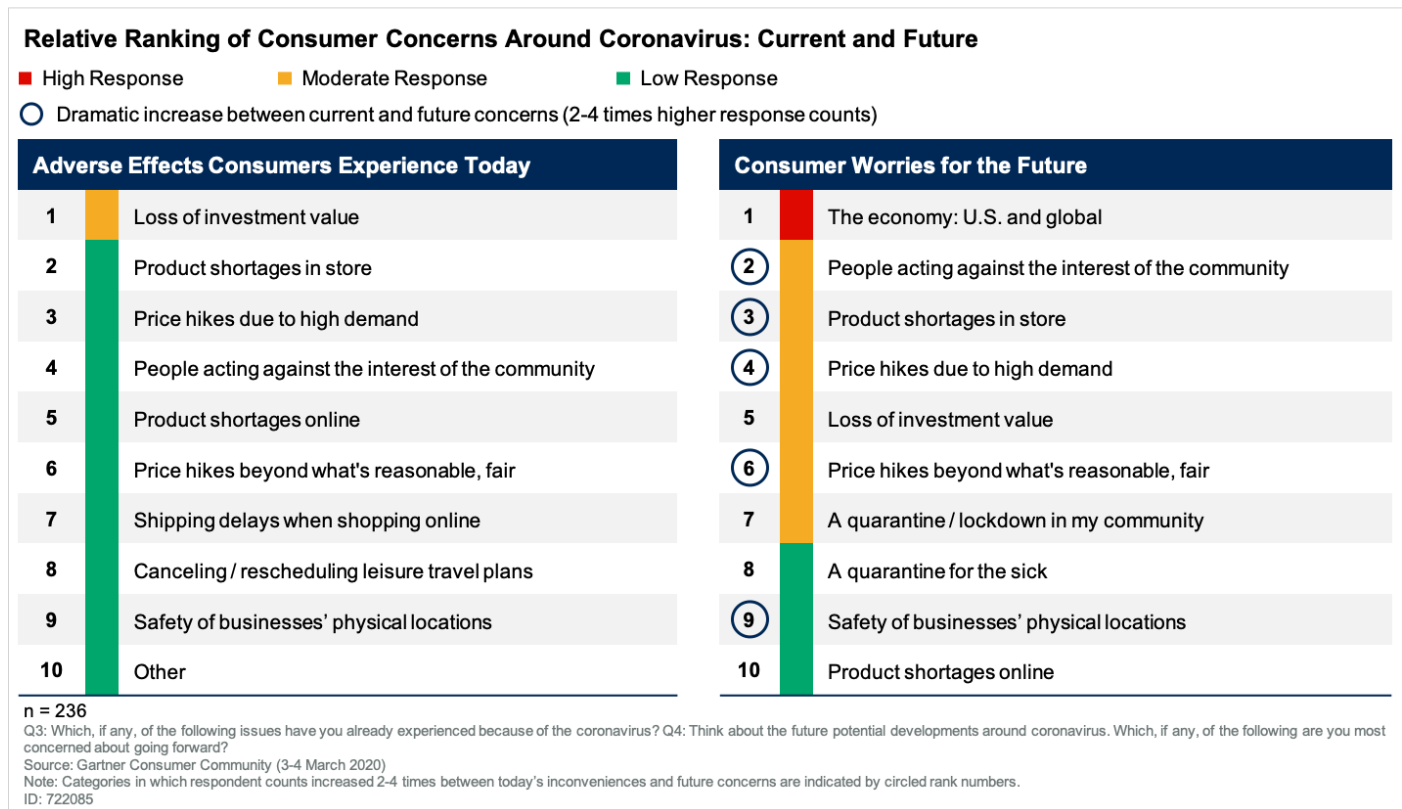


Figure 3. Economics, Investments and Empty Shelves Top the List of Consumer Coronavirus Worries

Table 1: Top-5 Most Important Ways Consumers Expect Companies to Act on Coronavirus Developments

Rank	Company Action
1	Notify customers if the company believes consumers may have been exposed to the virus at a company location
2	Provide up-to-date information about shortages, delivery or service delays
3	Implement additional measures for disinfecting in-store or physical locations owned by company
4	Update/communicate company rules that ensure customer safety and health

5 Waive service fees and penalties (e.g., late fees, cancellation penalties)

Source: Gartner Consumer Community (4-5 March 2020) n = 225

Consumers Task Companies With Maintaining Supply, Mitigating Risk and Keeping Customers Safe, but Only to a Point

Consumers have a list of specific actions they expect brands to take during the coronavirus crisis (see Table 1 above). The greatest onus for protecting people from exposure to the virus falls on brands with storefronts and other physical locations, which GCC respondents rank second only to the government in terms of responsibility (see Table 2).² Brick-and-mortar retail has long been a proving ground for social norms – a de facto public square. But it has recently taken on the role of battleground for ideologically divided consumers (see “[Consumer Insight: The Politicized Third Place](#)”), and now, a crucial front in the war against coronavirus. In both contexts, consumers demand that brands take the lead on setting boundaries for safety and behavior.

Table 2: Ranked Entities Consumers Hold Responsible for Coronavirus Protection and Help

Responsible for Protecting People From Exposure	Responsible for Resources to Help the Sick
Government	Government
Companies With Physical Locations	Nonprofit/Nongovernmental Organizations
People in Each Community/Citizen Groups	People in Each Community/Citizen Groups
Employers/Schools	Companies With Physical Locations
News Media	News Media
Nonprofit/Nongovernmental Organizations	Others
Others	Employers/Schools
Nobody	Nobody

Source: Gartner Consumer Community (4-5 March 2020) n = 225

But consumers’ expectations of branded spaces have limits: They insist brands inform their customers about exposure to the virus and expect that these environments will be cleaned as well as possible, but consumers are less likely to hold companies accountable for bolstering their workers’ safety and health through new policies. Nor do they see it as a priority that companies

should implement policies to bar people from stores and other locations based on health status. These options were among the least popular responses in our survey question about this topic,² perhaps because consumers understand the strain retail establishments face in a quarantine or “social distancing” moment. They don’t expect brands to take the health histories of their patrons at the door.

Instead, consumers say they see an urgent need for companies to clarify the impact of extenuating circumstances – both in terms of supply chain disruption and in the way the company does business with the public. Shoppers want timely information about product delays, and the elimination of cancellation fees for services that won’t be rendered (see Table 1 above).² Brands that treat these expectations as table stakes will generate goodwill capital that can be redeemed after the crisis has passed.

Preexisting Consumer Concern Should Inform Crisis Marketing Strategies

For several years, we’ve traced how four specific negative feelings inform consumer decision making across the population: fear, anxiety, FOMO (fear of missing out) and guilt. These sentiments are especially prevalent among Millennials and Gen Z (see Figure 4).¹

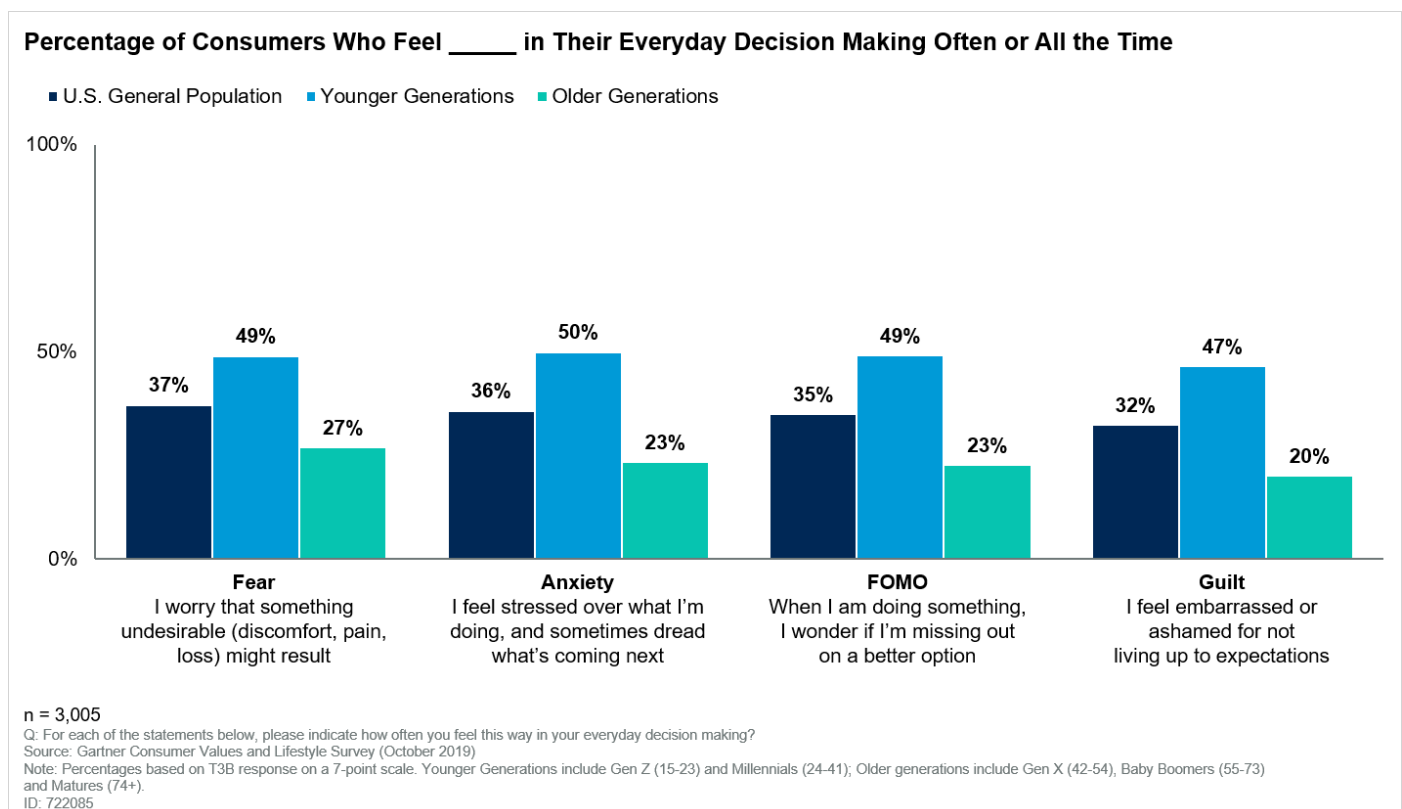


Figure 4. Even Before the Outbreak, Many Consumers Were in a State of Worry

These four negative decision drivers can be seen in the context of coronavirus consumer behavior. Take, for example, the well-publicized run on toilet paper.⁸ The motivations pushing so many people to stock up on this basic consumable can be understood as fear and anxiety about discomfort that would arise from running out of it. But they can also be understood as shame over failure to prepare one’s household, as well as peer pressure (fear of missing out) to shop as

scarcity drives up demand. Consumers alarmed by coronavirus told us via our GCC panel that they, too, are driven by these four negative emotions. ²

The bigger picture on consumers who live with these negative decision drivers is rather gloomy: They feel more negative about their lives, the economy and the country as a whole. ¹ They are also much more likely to distrust all institutions, including brands and companies, ¹ which adds to the challenges facing marketers in times of crisis. And yet, people who think this way – which is to say, likely all consumers living in a coronavirus reality – tend to have outsized expectations for brands’ presence in their lives. More than two-thirds want brands to take a hand in solving big problems (see Figure 5). ¹ That belief puts pressure on brands to take action in times of crisis, including this one.

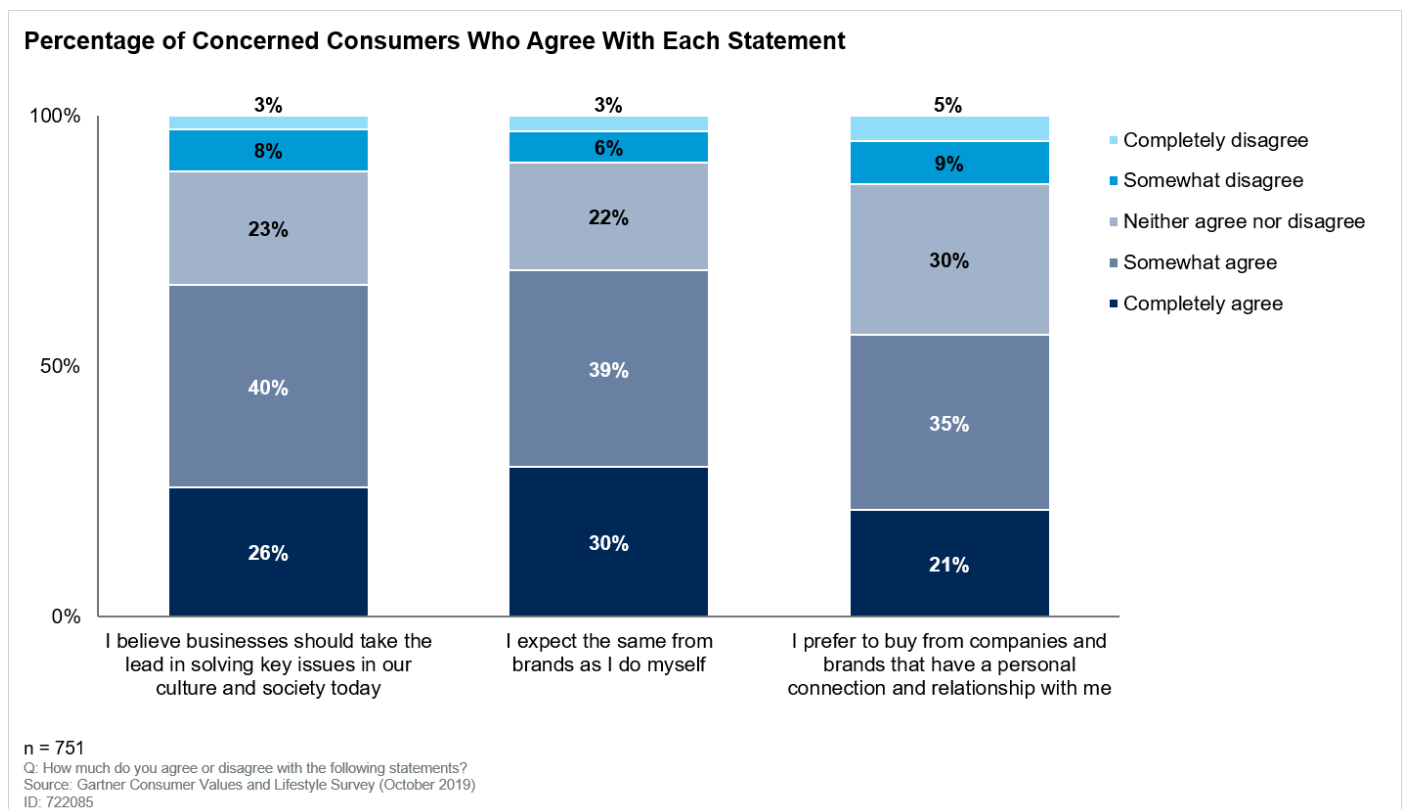


Figure 5. Concerned Consumers See Brands as Central, Personal

Recommendation: Cater to Consumers Seeking Comfort and Catharsis, Not Branded Public Service Announcements

Brands outside of endemic categories like retail, travel and healthcare may be questioning whether this crisis warrants total radio silence across all channels – at least in terms of messaging planned before the outbreak. Brands needn’t pull back entirely. Consumers expect brands to remain active, but certain messages will resonate more.

Because consumers are already overwhelmed with information (see Figure 6), ⁹ they don’t expect nonendemic brands to step up with public service announcements about coronavirus. Consumers are currently split on whether they believe brand reactions to coronavirus are made in the best interest of consumers, or motivated by protection of the corporation’s bottom line. ² So a specific

COVID-19 email or post from a nonrelated company may be read as self-interested or opportunistic.

Message, instead, on supportive subjects, such as ways consumers can feel in control or feel a virtual sense of community. But keep in mind that upbeat, positive messaging isn't necessarily welcome (see "Reframe Optimism to Connect With Consumers in Pessimistic Times"). Admonishing consumers to "calm down," or doling out platitudes, won't resonate. Consider that consumers are extraordinarily worried about the way others in their community will act in light of coronavirus (see Figure 3).² Finger pointing abounds, and brands may have an opportunity to redirect consumer blame and channel it into shared experience instead. Brands are in a better position to accomplish this if they demonstrate empathy and civic-mindedness in action before asking for it from customers. For travel and hospitality brands this is a must, as consumers expect it. Airbnb updated its Extenuating Circumstances Policy to waive cancellation fees in the wake of the crisis, for example.

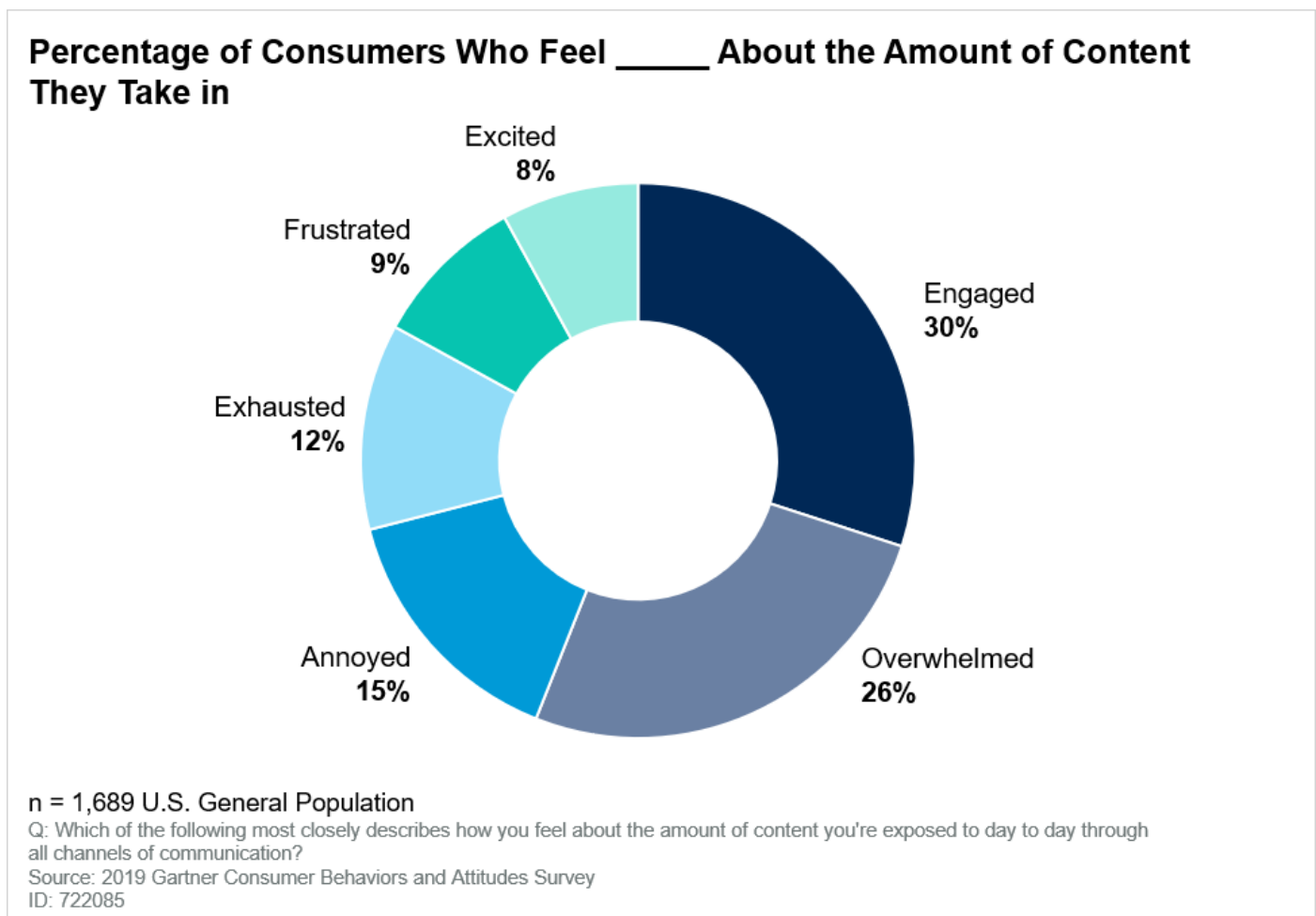


Figure 6. Consumers Pay Attention but Feel the Strain of Information Fatigue

Target set the right tone for a retailer by talking up the specific changes it would make to comfort consumers. Like many other retailers, Target sent emails and posted to its social media channels about the specific cleaning procedures it has implemented across its stores as a result of coronavirus.¹⁰ But it also announced a slew of other measures, including halting food sampling

and staffing up to provide same-day pickup and drive-up pickup at more stores. The brand also included promises to replenish stock of high-demand items around the clock, while at the same time limiting the quantity of high-demand items a shopper may purchase. Beyond all this, Target committed to “take care of our team,” by encouraging sick employees to stay home.

Recommendation: Carefully Reassess Preplanned Messages for the New Cultural Context

Retailers and brands with digital commerce capabilities should recognize that comfort comes in many forms. The act of online shopping itself is a source of comfort to some people under normal circumstances.¹ And even though shopping for some product categories in short supply may be fraught with tension, people engaging in “social distancing” at home will shop for nonessentials, too. D2C brands and retailers shouldn’t refrain from encouraging these behaviors and offering promotions, as long as goods are in stock and the products or services are safe to use in a coronavirus context.

But beyond putting merchandise on sale, brands can strive to make online ordering more comforting. Food delivery service Postmates, for example, pushed new promotions to its users offering discounts on delivery fees tied to themes around working from home or relaxing in a cozy spot at home. In fact, most delivery brands’ new promises of contactless doorstep delivery options can be seen as promoting reassurance and comfort.^{1 1}

Other brands are reassessing messaging in ways they have determined require more than just a nod to comfort, but instead a revision toward tact and new social norms. Hershey, for example, took the proactive step of pulling ad spots from circulation that showed people hugging affectionately while sharing chocolate bars, replacing them with commercials featuring product close-ups.¹² KFC, for its part, paused a campaign dedicated to the satisfaction of “finger licking.”¹³

But not all brands will need to make drastic — and expensive — changes to national television campaigns. Some shifts are relatively easy to execute and don’t involve costly video assets, such as scheduled social posts. Brands can reduce the cost and trouble of remaking campaigns by probing their creative libraries for past visual assets. Sometimes, the only thing that needs to change is text. Consider subtle moves, like the ones Josh Behr, director of marketing for Amerex Group, did for three clothing brands he manages. “In normal circumstances we’d [message to consumers] about going on vacation, but in this instance, when people might not be traveling ... we use messaging talking about buying stuff for the beach or other things they might be doing locally.”¹⁴

Methodology

To place the current consumer sentiment toward the ongoing coronavirus outbreak into a broader cultural context, we analyzed our proprietary quantitative consumer data (the 2019 Gartner Consumer Values and Lifestyle Survey, which predates the coronavirus outbreak) in conjunction

with our data from the Gartner Consumer Community (GCC), which addressed consumer sentiment, behaviors and attitudes specific to the coronavirus outbreak.

- First, we identified the general sentiments that were especially resonant with the Gartner Consumer Community members who were the most concerned about the coronavirus outbreak. We then used factor analysis of Gartner Consumer Values and Lifestyle Survey data to verify that preselected sentiment variables had similar response patterns in the U.S. general population.
- The resulting four sentiments that help describe and inform the attitudes of the most concerned or vigilant consumers are “fear” (expressed as: “I worry that something undesirable – discomfort, pain, loss – might result”), “guilt” (“I feel embarrassed or ashamed for not living up to expectations”), “fear of missing out” (“When I am doing something, I wonder if I’m missing out on a better option”) and “anxiety” (“I feel stressed over what I’m doing, and sometimes dread what’s coming next”).
- Last, the full sample of the 2019 Gartner Consumer Values and Lifestyle Survey (n = 3,005) was divided into quartiles based on the level of overall concern or vigilance. Respondents from the top 25th percentile were placed into a “highly concerned” group and used as a proxy to analyze, compare and describe the general attitudes, values and behaviors that are associated with this mindset.

Evidence

¹ Gartner Consumer Values and Lifestyle Survey (October 2019). This research was conducted via an online survey of 3,005 U.S. consumers ages 15 and older in August and September of 2019. Respondents for this survey were selected from those who have volunteered or registered to participate in online surveys.

² Gartner Consumer Community (March 2020). This research was conducted via a series of online activities offered to a panel of ~450 community members. Separate activities were conducted to assess GCC members’ general sentiment (not related to coronavirus outbreak) and later to address their attitudes and behaviors in the context of the current coronavirus outbreak.

³ [“Avoiding Coronavirus May Be a Luxury Some Workers Can’t Afford.”](#) New York Times.

⁴ [“The Rich Are Preparing for Coronavirus Differently.”](#) New York Times.

⁵ [“Told to Stay Home, Suspected Coronavirus Patient Attended Event With Dartmouth Students.”](#) New York Times.

⁶ [“When Xenophobia Spreads Like a Virus.”](#) NPR.

⁷ [“Coronavirus Rationing: Target, Walmart Limit Purchases of Hand Sanitizer, Disinfecting Wipes, Toilet Paper.”](#) USA Today.

⁸ [“Walmart, Amazon, Target Nearly Sold Out of Toilet Paper Online.”](#) MSN.

⁹ 2019 Gartner Consumer Behaviors and Attitudes Survey. This research was conducted via an online survey of 1,689 U.S. consumers ages 15 and older in August and September of 2019. Respondents for this survey were selected from those who have volunteered or registered to participate in online surveys.

¹⁰ [“A Note to Our Guests About the Coronavirus From CEO Brian Cornell.”](#) Target.

¹¹ [“Postmates: ‘Today We’re Launching Drop-Off Options.’”](#) Twitter.

¹² [“Hershey Pulls Ads With Hugs and Handshakes Amid Coronavirus Concerns.”](#) AdAge.

¹³ [“KFC Pauses Finger Lickin’ Ads Amid Coronavirus Panic and 150 Complaints.”](#) The Drum.

¹⁴ [“How Forward-Thinking E-Commerce Marketers Are Handling the Coronavirus Outbreak.”](#) Klaviyo.

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