

# Pandemic paradigm shift

**How the brand-consumer  
relationship is changing**

# What's coming up today

- 01 Who is GWI?**
- 02 Brand loyalty is at an all-time low**
- 03 Quality over quantity**
- 04 The end of the curated self**
- 05 Experimentation, novelty, and change**
- 06 The search for meaning**
- 07 Key insights**
- 08 Questions**

# Who is GWI?

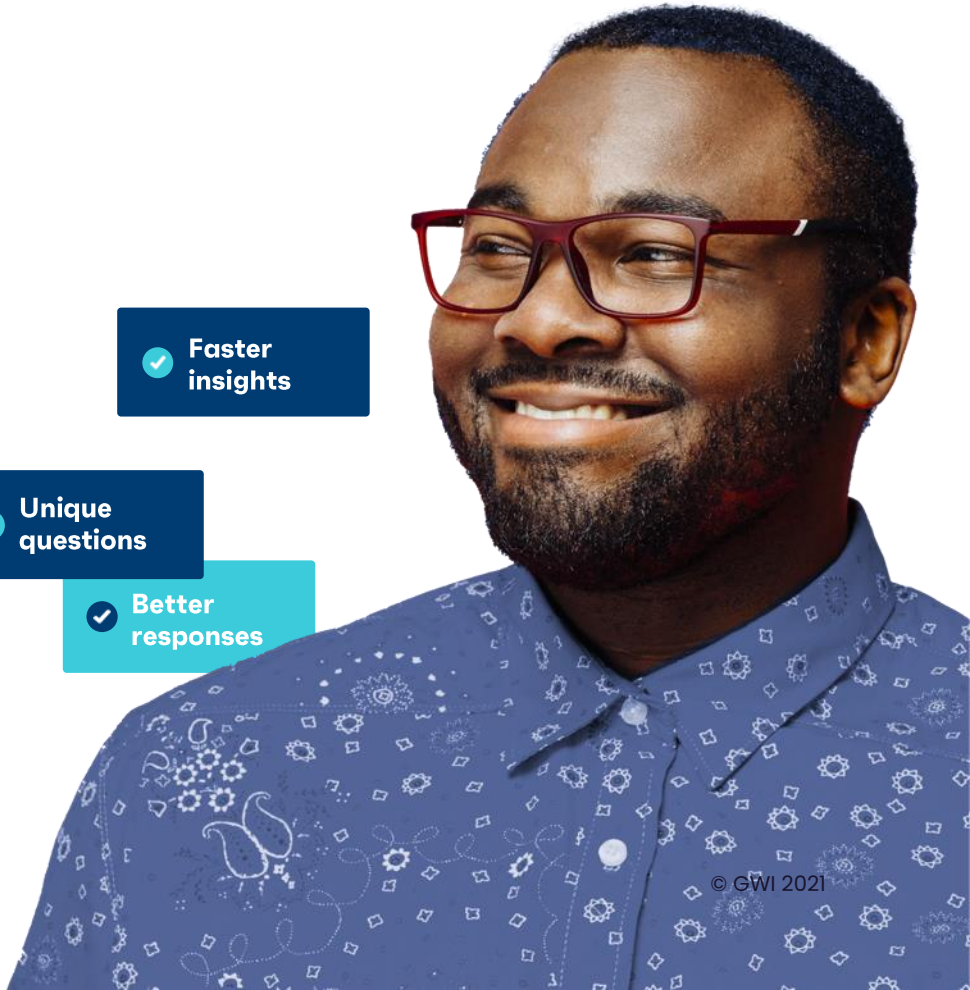


# The world's largest study into the digital consumer

✓ Faster  
insights

✓ Unique  
questions

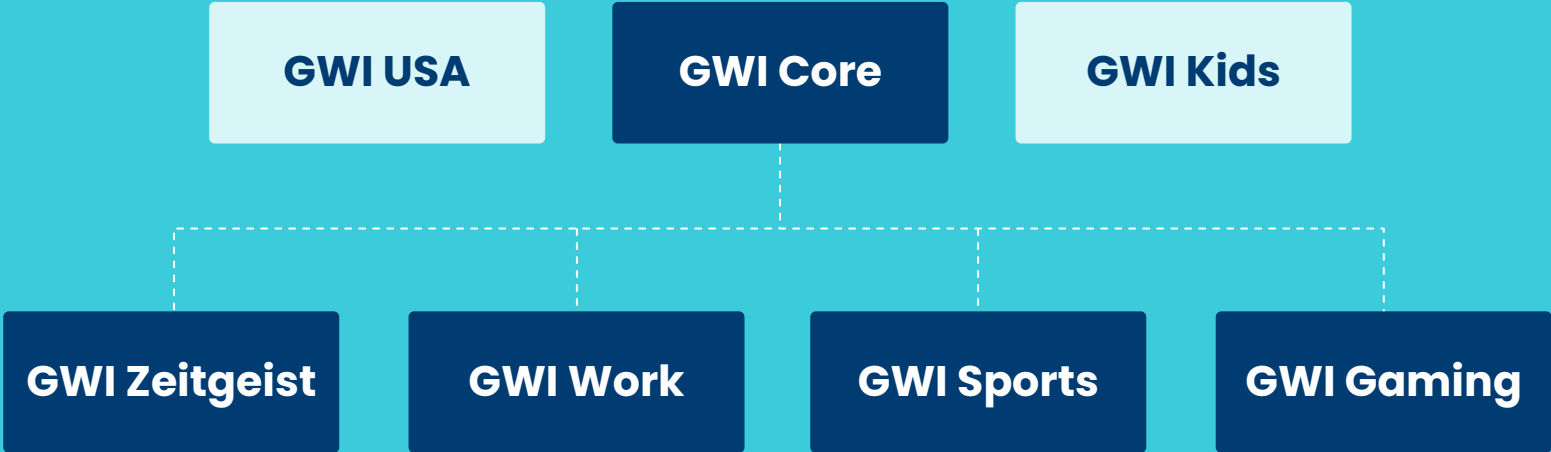
✓ Better  
responses



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# Our data sets

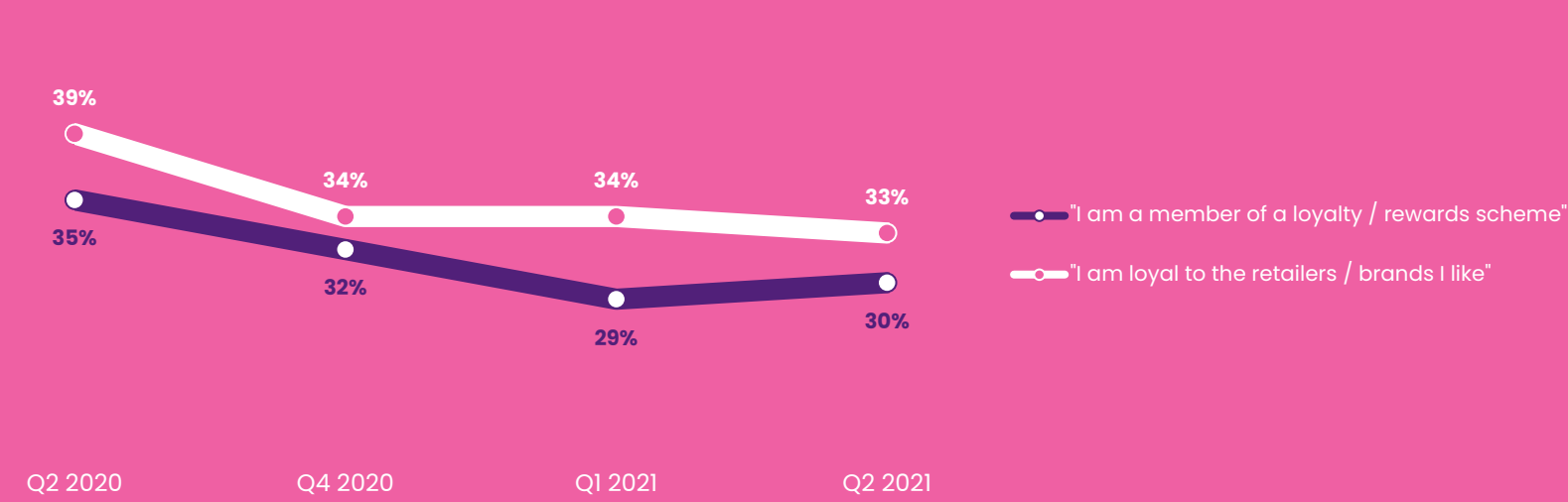


# Brand loyalty is at an all- time low



# Brand loyalty is gradually declining

% of U.S. internet users who agree with the following statements...

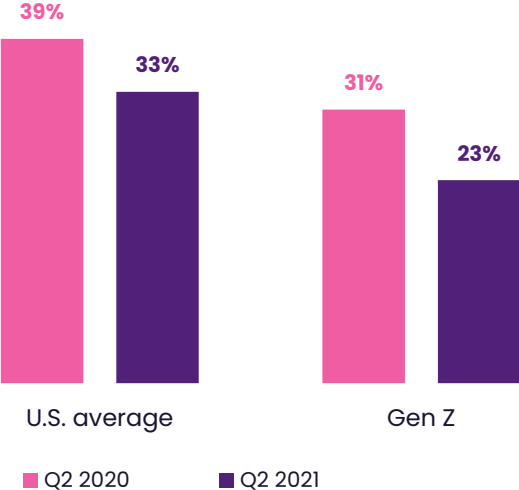


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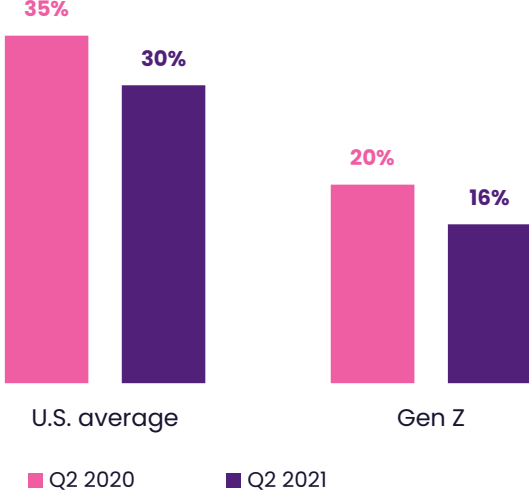
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# And lowest among the youngest consumers

“I am loyal to the retailers / brands I like”



“I am a member of a loyalty / rewards scheme”





# Quality over quantity



# The inclination to spend time & effort saving money is declining

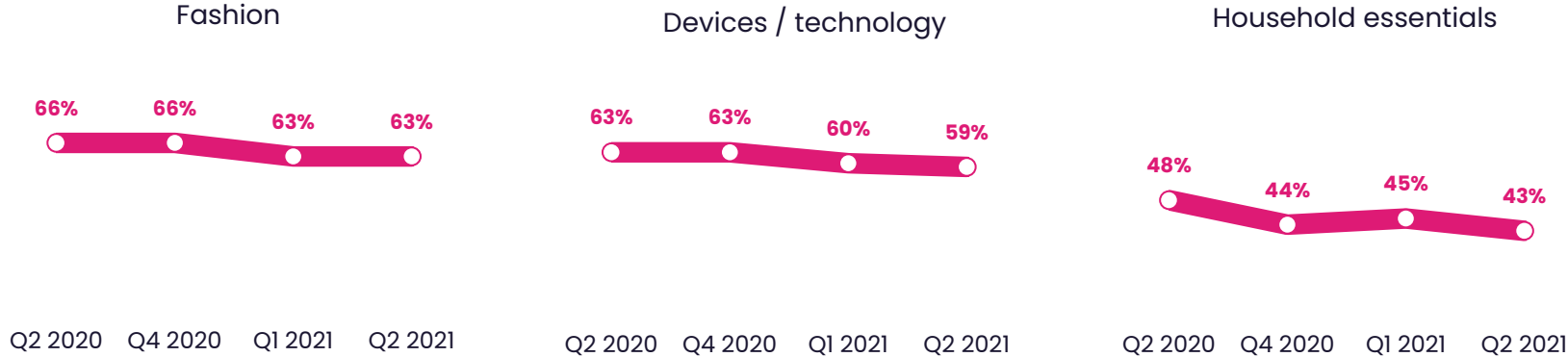
% of U.S. internet users who agree with the following statements...

■ Q2 2020 ■ Q2 2021



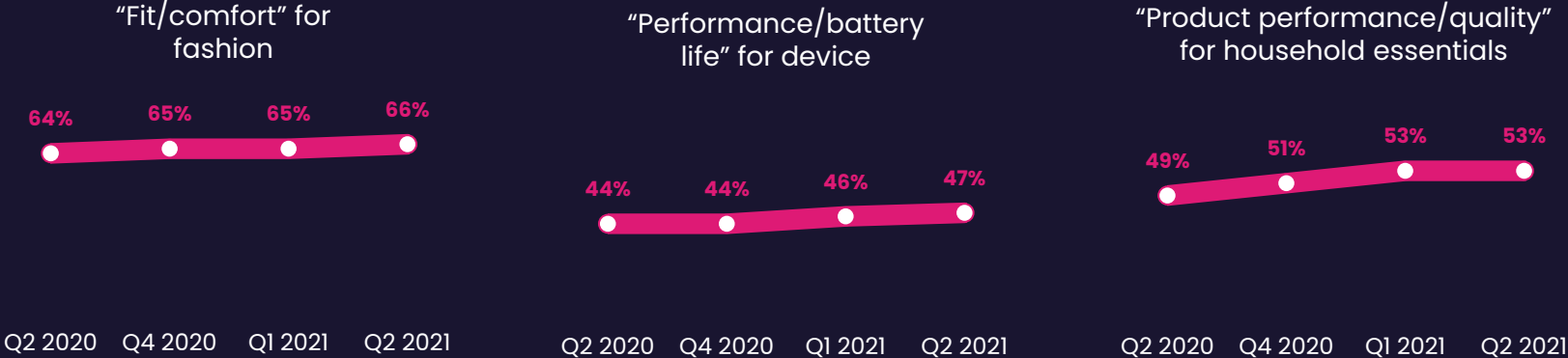
# Price as a purchase factor is declining across categories

% of U.S. internet users who say "price" is an important factor when making purchase in these categories:



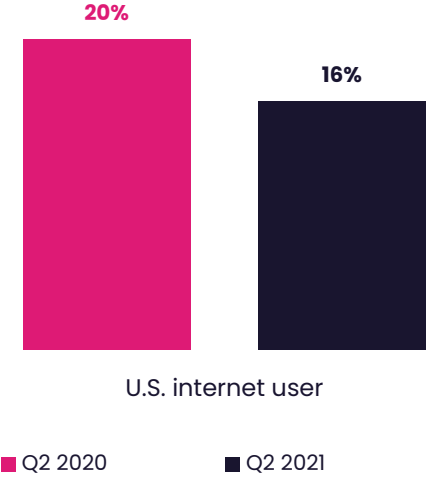
# While markers of quality are becoming more important

% of U.S. internet users who the following are important factors when making purchases in these categories:

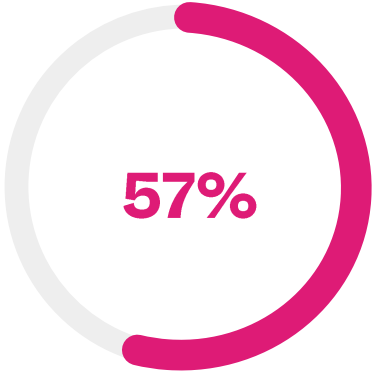


# Fervor for big shopping events has fallen

"I wait for events like Black Friday to make major purchases"



"I don't plan to shop during Black Friday / I'm not sure yet"



# Brand implications

**As consumers realize their time is finite, they look for meaning in their lives. In response brands should emphasize:**



**Quality and  
longevity of their  
products**



**Simplification of  
buying, customer  
care, returns**

# End of the "curated" self

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“

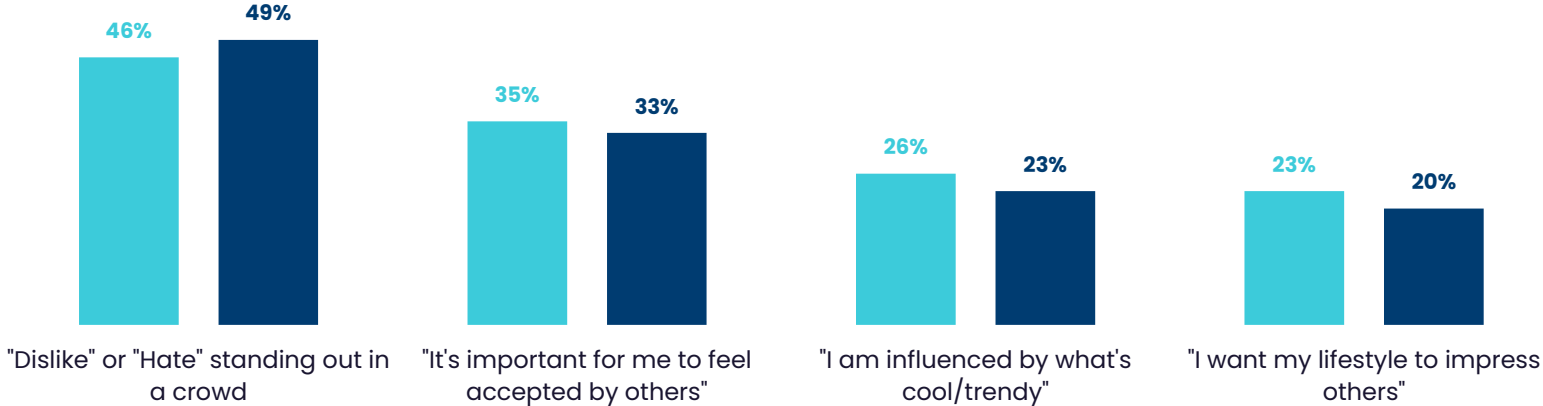
**With so much upheaval around us,  
I think we all started to crave real,  
meaningful connection over the  
fleeting thrill of social validation.**

Sean Herman, Founder & CEO, Kinzoo

# For young people, the importance of others' perceptions is declining

% of U.S. Gen Zs who agree with the following statements...

■ Q2 2020 ■ Q2 2021



# Being open, vulnerable, and “yourself” is valued

% of U.S. Gen Zs who agree with the following statements...

■ Q2 2020 ■ Q2 2021



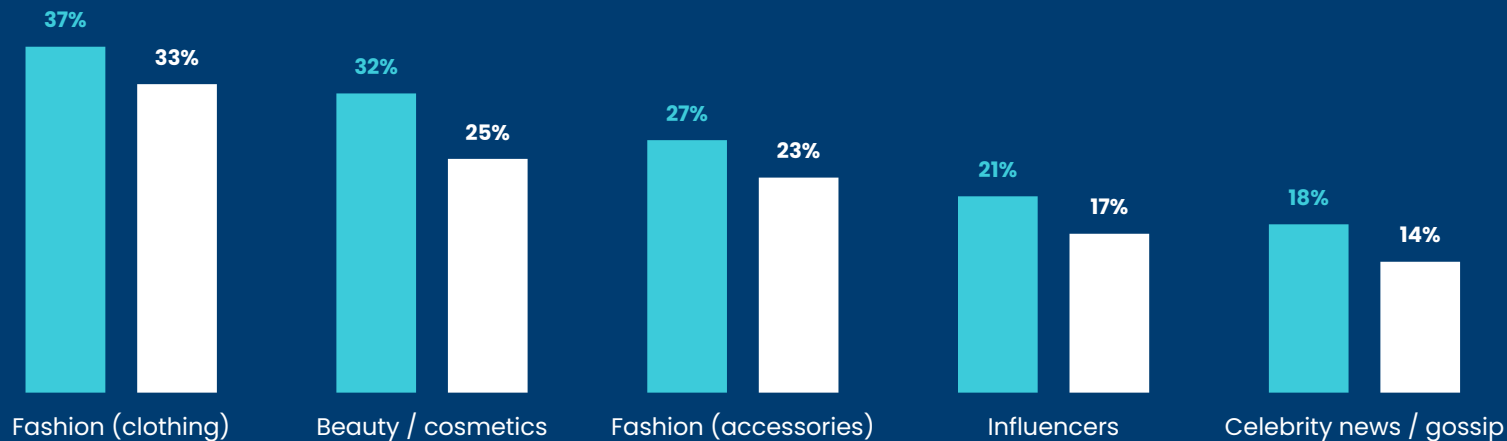
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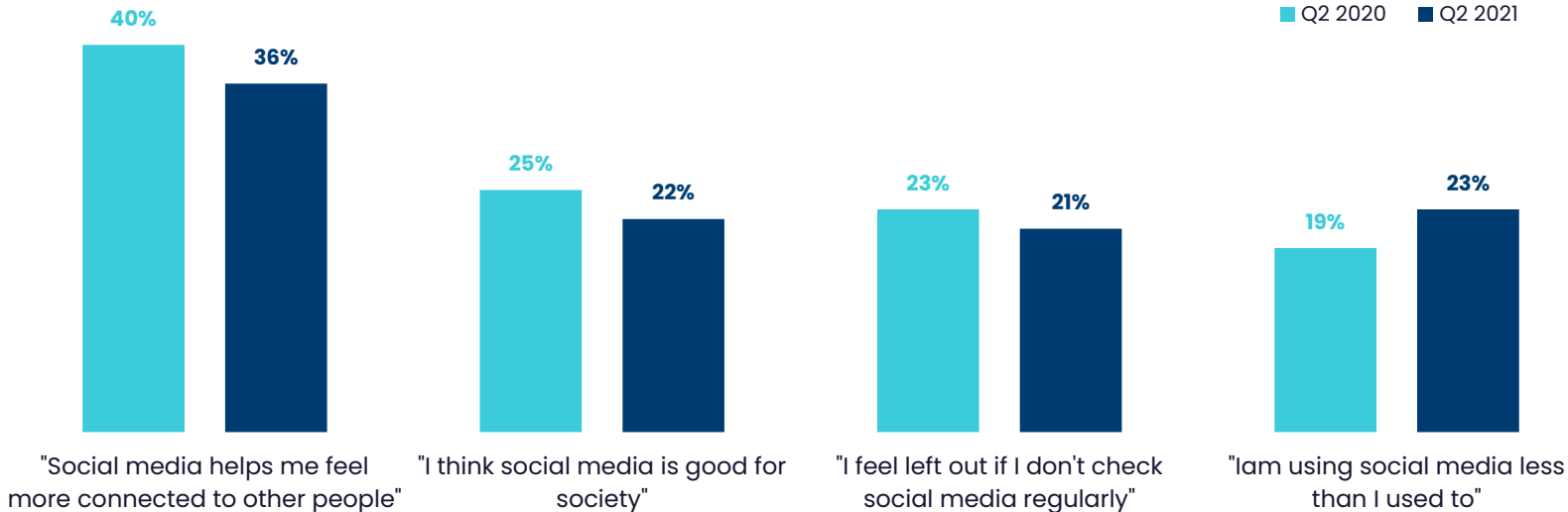
# This is reflected in a shift away from image-based interests

% of U.S. Gen Zs who say they're interested in the following topics...

■ Q2 2020 ■ Q2 2021

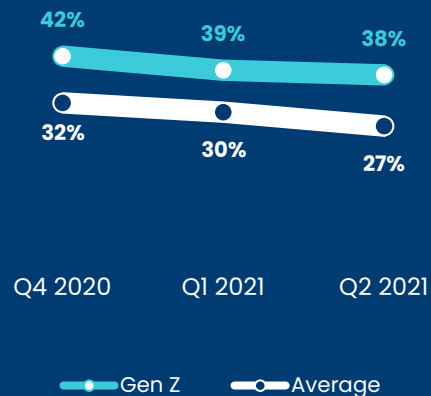


# Gen Z's view of social media is growing more negative

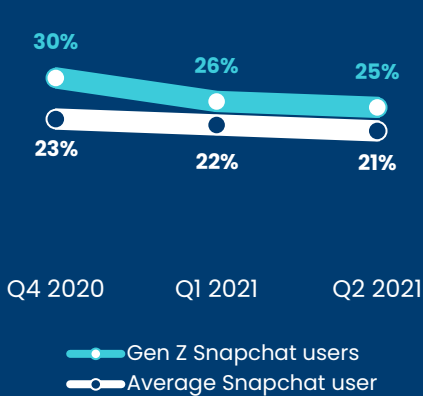


# Reflecting a decline in filters and similar features on social media

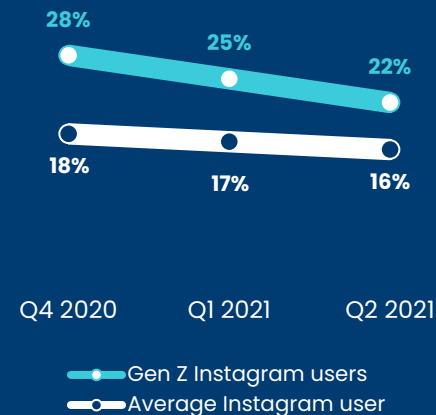
% of Snapchat users who have used "filters/geofilters" on Snapchat



% of Snapchat users who have "used lenses"



% of Instagram users who have "used filters" on Instagram



# The top 10 genuinfluencers to watch

01

**@aimeesong**  
5.8M followers  
USA

02

**@chrisellelim**  
1.4M followers  
USA

03

**@agatheaproux**  
813k followers  
France

04

**@diamond\_april**  
427k followers  
Russia

05

**@rachelstyliste**  
303k followers  
France

06

**@ariadneartiles**  
530k followers  
Spain

07

**@munroebergdorf**  
575k followers  
UK

08

**@frankiebridge**  
1.3M followers  
UK

09

**@hannahbronfman**  
764k followers,  
USA

10

**@mandycaprist0**  
655k followers  
Germany

# Brand implications

**As young consumers drive a trend toward realness, brand messaging must follow suit:**





**Practice  
transparency**



**Be informative  
rather than  
performative**



**Choose  
ambassadors  
that are relatable  
to normal people**

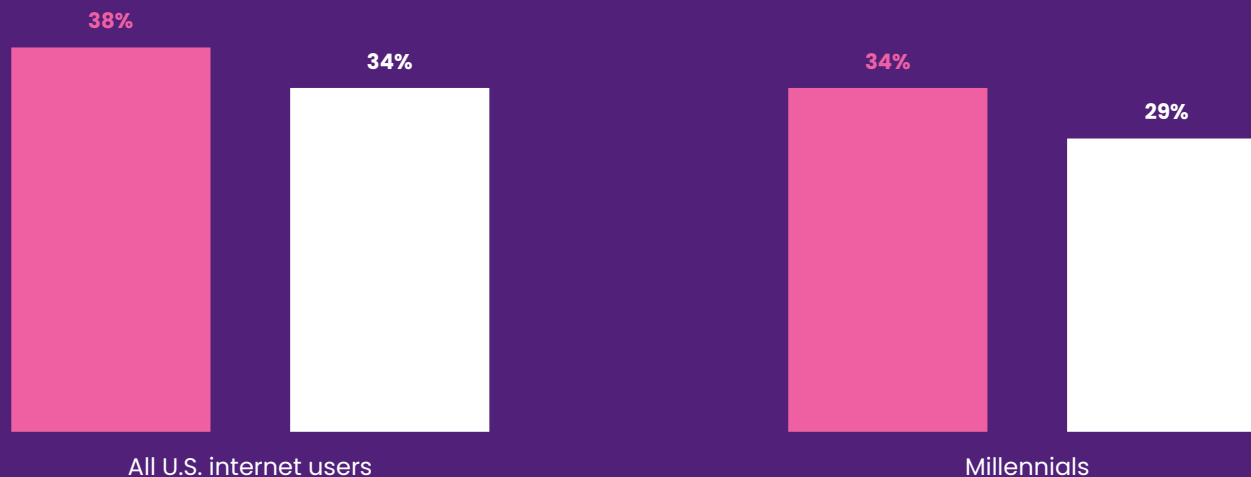
# Experimentation novelty and change



# The importance of routine is declining

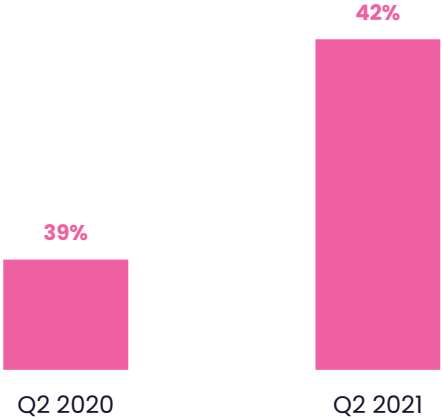
% of U.S. internet users who say "Having a routine" is important to them...

■ Q2 2020 ■ Q2 2021

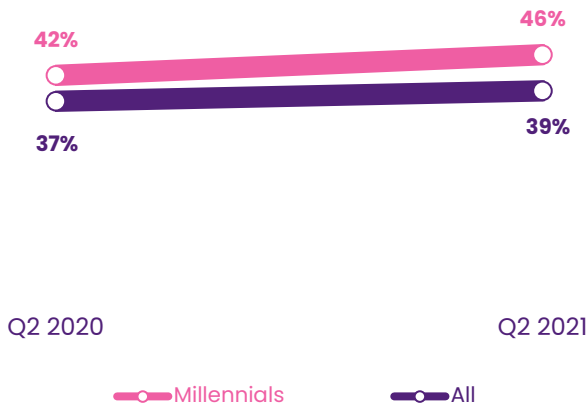


# While exploration and experimentation are becoming more important

% of **Millennials** who say “exploring the world” is important to them



% who say “learning new skills” is important to them



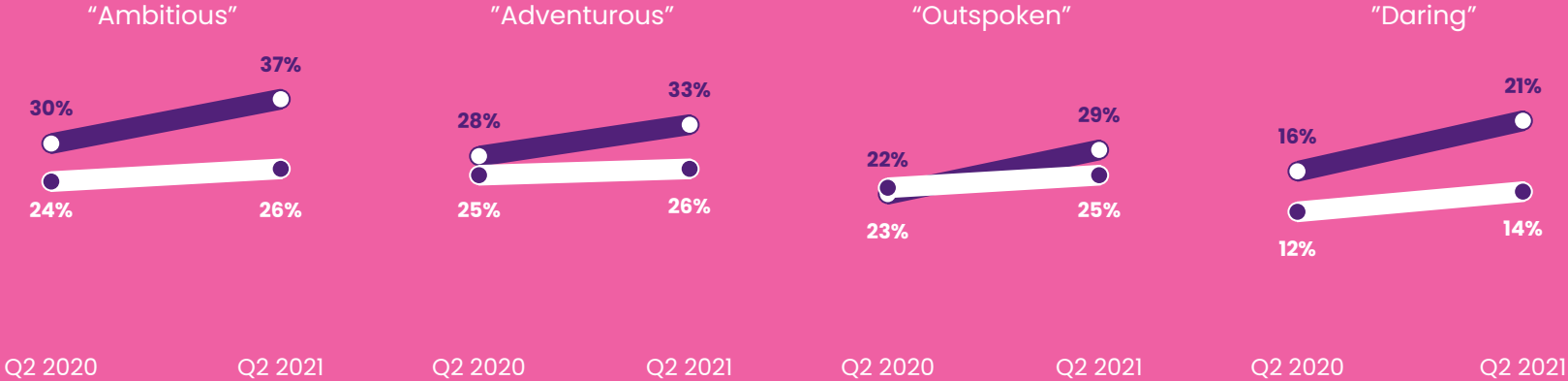
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# Consumers increasingly identify with bolder, more adventurous character traits

% of U.S. internet users who say the following character traits describe them

■ Millennials ■ All

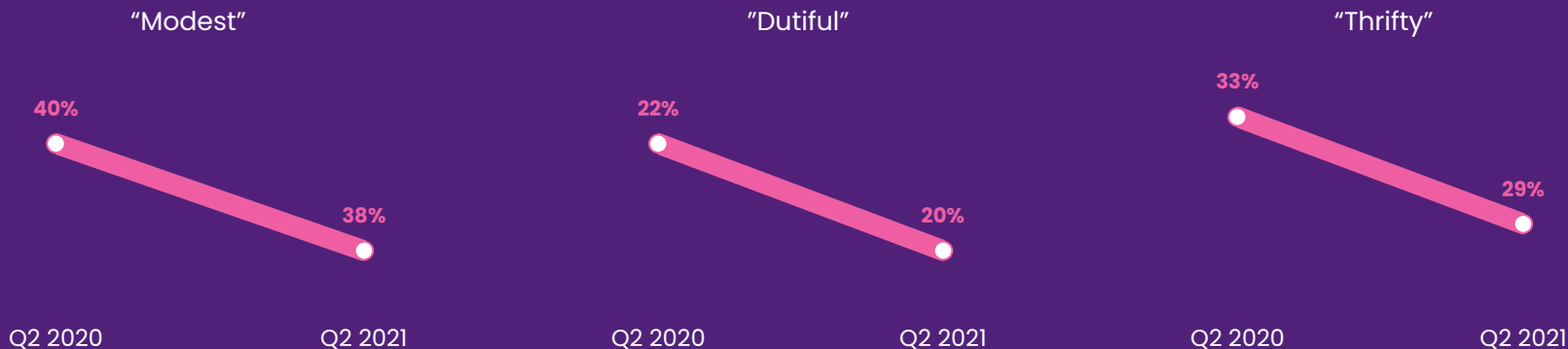


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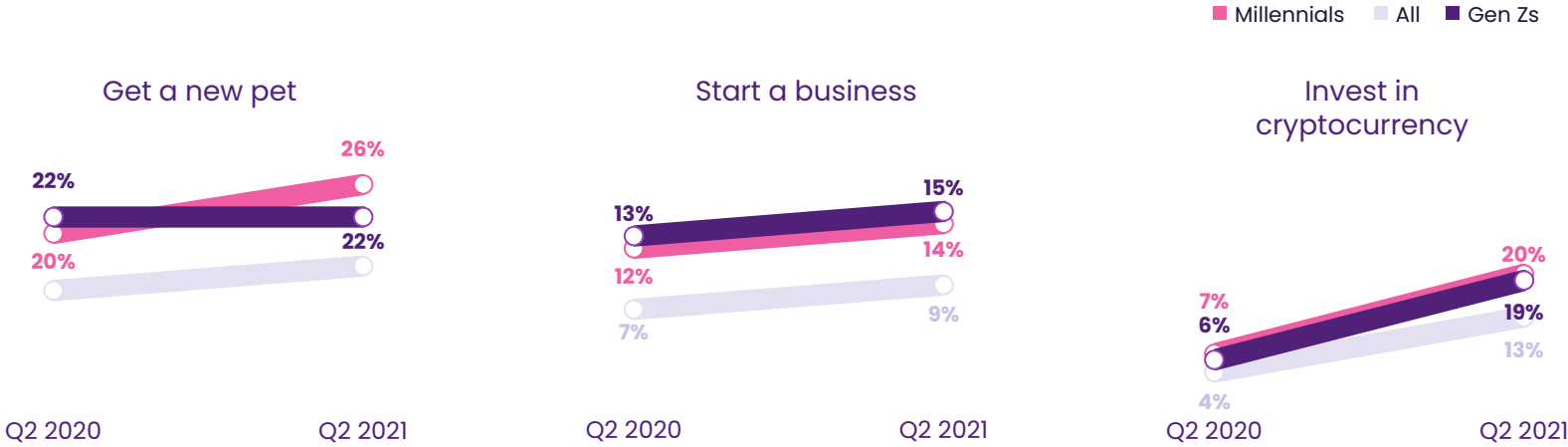
# And identifying less with conservative traits that reflect fulfilling obligations

% of U.S. internet users who say the following character traits describe them



# Decisions and life-changes show a higher risk tolerance

% of U.S. internet users who say they are planning on doing the following in the next 6 months



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“

The Clock-Out Cure  
For those who can afford it, quitting has become the ultimate form of self-care

THE CUT

“

The 'YOLO Economy' —  
How Millennials are  
Reimagining Life Post-  
Pandemic

**yahoo!**

“

The Yolo economy  
paradox  
*The Washington Post*

“

Welcome to the  
YOLO Economy  
*The New York Times*

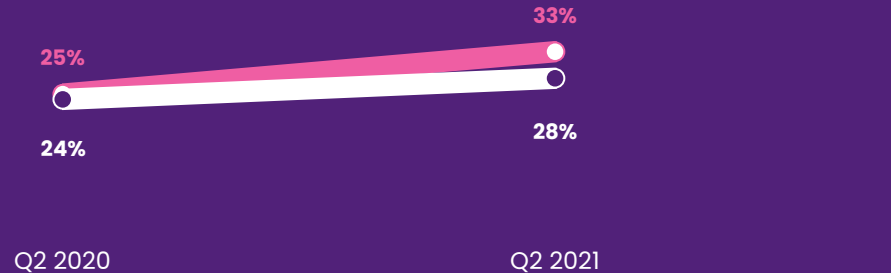


# The importance of family, parenthood, and major life milestones are increasing

% who say that “raising a family” is important to them



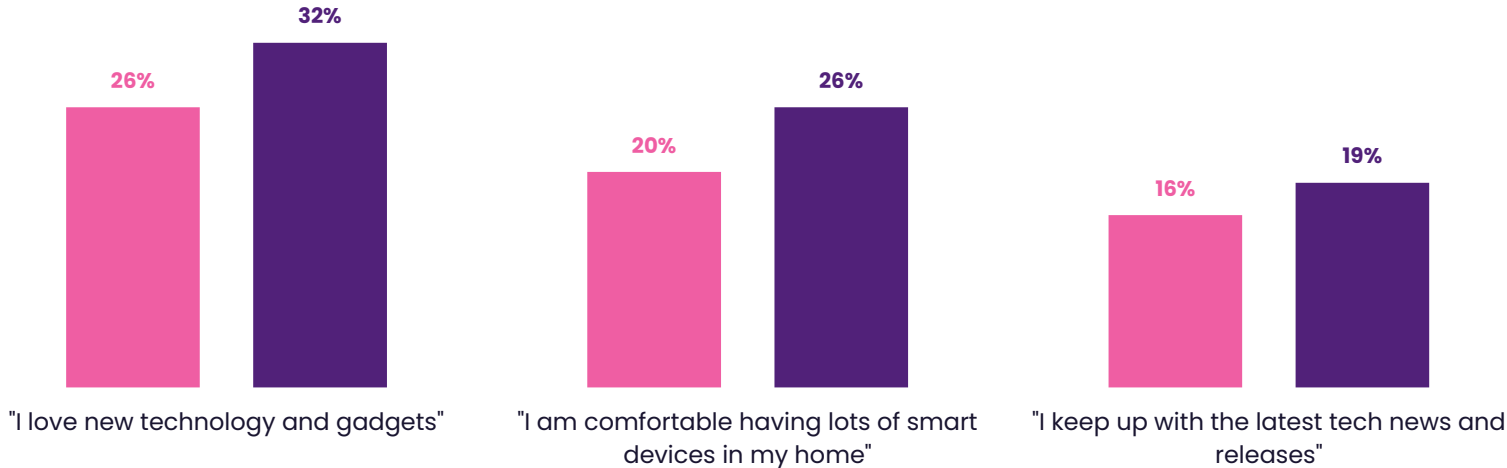
% who say that “being a good parent” is a top 3 life aspiration



# Experimentation also shows up in how we're adopting technology

% of U.S. internet users who agree with the following statements

■ Q2 2020 ■ Q2 2021



# Brand implications

**How brands benefit from the consumer spirit of change largely depends on the industry:**



**Innovators can  
take their own risks  
with new products,  
features, and services**



**Brands focused on  
reliability can  
further cement that,  
helping consumers  
feel better about risk**

# The search for meaning



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# Interest in social justice, diversity, and inclusivity has grown

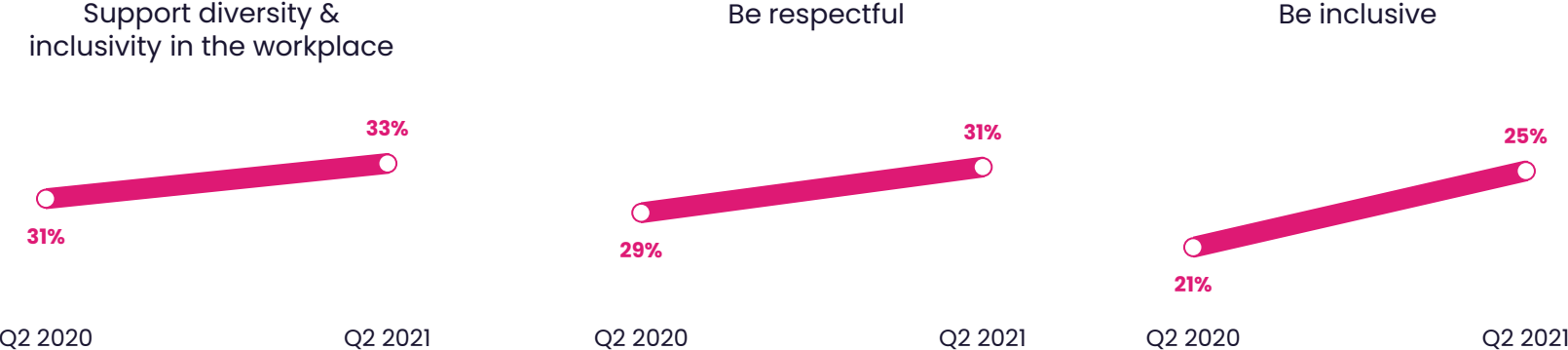
% of U.S. internet users who say the following

■ Q2 2020 ■ Q2 2021



# This is reflected in what consumers' demands of brands

% of U.S. internet users who say they want brands to do the following



# How people choose to invest their money

Compared to investors 45+, investors under 45 are...



**nearly 2x**

more likely to say a company's **social impact** is a consideration when investing



**1.5x**

as likely to say a company's **mission & values** are a consideration when investing



“

**The Activist: reality TV show to be  
'reimagined' as documentary  
after backlash.**

**The  
Guardian**

“

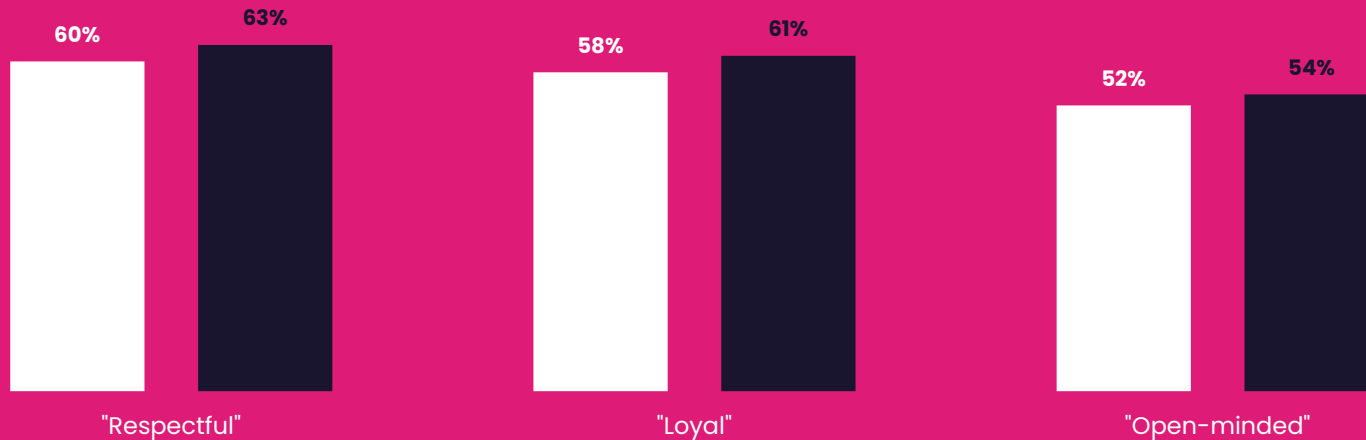
**We're heading towards a post-purpose marketplace, where people are no longer buying what you make - or why you make it - but instead who you can **help them become.****

Thomas Kolster, Branding & sustainability professional,  
Author of "The Hero Trap"

# Self-identification as “altruistic” is rising

% of U.S. internet users who say the following character traits describe them

■ Q2 2020 ■ Q2 2021



# Brand implications

**In the context of this broader search for meaning brands should:**

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**Be careful not to fall into the “hero trap”**



**Enable consumers to fulfill their need to be altruistic through information and education**

# Key insights

## Brand loyalty is on the decline

And is lowest among the youngest consumers; brands need to understand the movement of major consumer mindset shifts to realign

## Quality over quantity

Time is finite, and consumers increasingly want to focus less on spending it trying to save money, seeking to simplify the material aspects of life

## The curated self online is waning

Young consumers want brands and influencers to be honest, informative, and unafraid to be vulnerable

## The YOLO economy is coming

But it's about more than chasing pleasures; it includes taking career or financial risks, re-evaluating relationships, and prioritizing big milestones

## The search for meaning continues

And will see consumers wanting to live their own values, being drawn to brands that empower them to do so authentically - not exploitatively

# Want to know more?



Talk to me – I'm here to help.

[apalmer@gwi.com](mailto:apalmer@gwi.com)

**GWI.**