

DIVIDED AMERICA – US – 2023

Americans are concerned about the country's continued political divide and are grappling with stress over the upcoming 2024 Presidential election.



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This report looks at the following areas:

- Consumers' outlook on the US political landscape and current political division
- Expectations for brands and potential opportunities during the 2024 election year
- Americans' political engagement and planned participation in the 2024 election
- Key issues voters are considering ahead of election season



Americans are concerned about the country's continued political divide and are grappling with stress over the upcoming 2024 Presidential election.

Overview

Since 2016, political division in the US has been widening with little sign of improving. More than half of consumers today **describe the country as "very divided,"** and point to a number of reasons behind the divide. In addition to conflicting political beliefs, Americans believe social values, economic disparity and racial tensions all contribute to the country's division.

As the 2024 presidential election approaches, **the majority of Americans are stressed** with several important issues influencing their voting decision. Many consumers also expect brands to speak up on political issues and address the country's widening divide. **Brands need to consider their core audience, as well as their established brand values to determine if and how to engage in the upcoming election.**

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Report Content

EXECUTIVE SUMMARY

- What You Need to Know
- Consumer Trends: Key Takeaways
- The five year outlook for a divided America
- Opportunities

TARGET AUDIENCE

Americans' political identity

- Mintel's political profiles
- Segmenting consumers' based on political affiliation and political ideology
 - Graph 1: political profiles, 2023
- Mintel's political profiles remain consistent from 2020
 - Graph 2: political profiles, 2020
- In general younger Americans skew Democratic - but some are still figuring it out
 - Graph 3: political profiles, by generation, 2023
- Historically underserved populations are more likely to lean Democrat
 - Graph 4: political profiles, by gender and LGBTQ+ identity, 2023
 - Graph 5: political profiles, by ethnicity and Hispanic origin, 2023

Political profiles by the numbers

- Conservative Republicans skew married, White, male and Baby Boomer
- Lite Republicans are more likely to be middle income, Gen X moms
- Though similar to the total population, Liberal Democrats skew Black, LGBTQ+ and urban-dwelling
- Lite Democrats overindex as young, multicultural parents
- Consumers who identify as Independent or affiliate with another party are similar to the total population with a few exceptions
- Consumers without any political affiliation are more likely to be young, low-income and unmarried

MARKET FACTORS & CONTEXT

- The state of the country leading up to the 2024 election
- An influx of migrants arriving in northern cities is creating Democratic divisions on the issue of immigration
- Republicans and Democrats, alike, aim to control the narrative of the country's spike in crime
- The end of Roe v. Wade continues to energize Democratic voters

- The increasing risk of climate disasters puts climate change in the hot seat

CONSUMER INSIGHTS

Consumer fast facts

The role of brands in the 2024 Election

- Many consumers look to brands for political information and support
- Young and multicultural consumers are more likely to want and trust brands' political support
 - Graph 6: agreement – "I like knowing if the brands I buy from/use support similar political views as my own," by generation, ethnicity and Hispanic origin, and LGBTQ+ identity, 2023
 - Graph 7: agreement – "I trust brands to provide unbiased political information/education," by generation, ethnicity and Hispanic origin, and LGBTQ+ identity, 2023
- Chobani remains committed to its philanthropic stances despite political polarization
- Brand soapboxing is becoming more common and anticipated by consumers, whether they support it or not
 - Graph 8: agreement – "I expect more brands will speak up on social/political issues during the 2024 presidential election than in 2020," by ethnicity and Hispanic origin, 2023
 - Graph 9: agreement – "I expect more brands will speak up on social/political issues during the 2024 presidential election than in 2020," by generation, 2023
- The outcome of the 2024 election is a source of stress for the majority of consumers
 - Graph 10: agreement – 2024 election concerns, 2023
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 - Graph 11: agreement – "The outcome of the 2024 elections is a significant source of stress for me," by parental status and by LGBTQ+ identity, 2023
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 - Graph 12: agreement – "Brands should encourage voter registration and voting," by political profile, 2023
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 - Graph 13: agreement – "I feel my vote makes a difference in presidential elections," by generation and household income, 2023
 - Graph 14: agreement – "I feel my vote makes a difference in presidential elections," by ethnicity and Hispanic origin, 2023

Political dedication and confidence

- Brands that address political issues should be prepared for political enthusiasts to respond
 - Graph 15: agreement – "It's important I stay up to date on political issues and events," by political profile, 2023
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 - Graph 16: self-described political knowledge, by political profile, 2023
- Political engagement and knowledge increases as Americans mature
 - Graph 17: self-described political knowledge, by generation, 2023

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- Graph 18: agreement – "It's important I stay up to date on political issues and events," by generation, 2023
- Gen Zs are more politically active than previous generations of 18-24 years
- PUMA taps into Gen Z's social and political engagement

Outlook on the US divide

- Amidst continued political division, brands must contemplate the potential positive and negative effects of joining the political conversation
- Consumer segments who are less emphatic about the country's divide may be more open to brands addressing political issues and events
 - Graph 19: perceptions of US divide, by generation, 2023
 - Graph 20: perceptions of US divide, by political profile, 2023
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 - Graph 22: causes behind the US divide, by gender and LGBTQ+ identity, 2023
 - Graph 23: causes behind the US divide, by generation, 2023
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 - Graph 24: agreement – "Brands can help unite the American people," by political profile, 2023
- Young and multicultural consumers feel brands can make a difference
 - Graph 25: agreement – "Brands can help unite the American people," by generation and LGBTQ+ identity, 2023
 - Graph 26: agreement – "Brands can help unite the American people," by ethnicity and Hispanic origin, 2023

Political influence/resources

- Although traditional media outlets remain the standard, newer, digital resources have a considerable audience
 - Graph 27: resources regularly used to stay up to date on political happenings, 2023
- Generation and identity impact the type of resources consumers use to stay up to date on political news
 - Graph 28: resources regularly used to stay up to date on political happenings, by ethnicity and Hispanic origin, and by LGBTQ+ identity,, 2023
 - Graph 29: resources regularly used to stay up to date on political happenings, by generation, 2023
- Despite relying on social media for political news, trust in social media is not necessarily a given
 - Graph 30: agreement – "In general I trust the news stories I read on social media sites," by ethnicity and Hispanic origin, 2023
 - Graph 31: agreement – "In general I trust the news stories I read on social media sites," by generation, 2023
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 - Graph 32: agreement – "The people who I socialize with generally have the same political beliefs as me," by generation, 2023

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- Graph 33: agreement – "I actively seek out differing perspectives on issues I'm passionate about" by generation, 2023

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- The majority of eligible Americans plan to vote in the 2024 election, however young and Asian consumers are less assured of their plans
 - Graph 34: likelihood to vote in the upcoming 2024 presidential election, by generation, 2023
 - Graph 35: likelihood to vote in the upcoming 2024 presidential election, by ethnicity and Hispanic origin, 2023
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 - Graph 37: political engagement within the 2024 presidential election, by ethnicity and Hispanic origin, 2023

Americans' key issues of concern for 2024 election

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 - Graph 38: importance of issues for personal voting decision in 2024 presidential election, 2023
- In general, social and global issues take a backseat to the issues that impact voters' day-to-day lives
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 - Graph 39: issues of high importance for presidential voting decision in 2024 vs 2020, 2023
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 - Graph 40: importance of LGBTQ+ rights for personal voting decision in 2024 presidential election, by generation, 2023
 - Graph 41: importance of LGBTQ+ rights for personal voting decision in 2024 presidential election, by gender and LGBTQ+ identity, 2023
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 - Graph 42: importance of climate change for personal voting decision in 2024 presidential election, by ethnicity and Hispanic origin, 2023
 - Graph 43: importance of climate change for personal voting decision in 2024 presidential election, by gender and LGBTQ+ identity, 2023
- Opportunity for sustainably-focused brands to address the climate crisis

COMPETITIVE STRATEGIES

Marketing and advertising

- Argent's "Voting Suits You" campaign promotes voting and women's rights issues
- Liquid Death released Election Hydration Kits exclusively to Georgia voters

Opportunities

- Offer Positive Perspectives to alleviate election stress

- When appropriate, encourage political participation and authentic self-expression

APPENDIX

- Consumer research methodology
- Market definitions
- Generations
- Abbreviations and terms

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