



Mood+Mindset Report

A Loyalty Reboot In the Age of Polarization

WAVE 2 RESULTS

The first half of 2025 has been marked by intensified polarization, economic whiplash, and rising reputational risks for brands entering public discourse. Many leadership teams have hit the mute button, pulling back from climate, equity, and inclusion commitments, not because they've stopped believing, but because they've started fearing.

Layer onto this a cultural shift in loyalty, whether in the workplace or the marketplace, where long-term allegiance is giving way to a more fluid, transactional mindset. People are now weighing whether businesses are retreating from their values as part of their decision to buy, join, or stay. The choice facing leaders is stark: hide behind "neutrality" or lead with conviction.

Our latest Mood + Mindset Report survey suggests the right choice is both more urgent and more nuanced than ever.

Searching for Stability

Americans' overall mood has improved modestly since April, but anxiety and uncertainty remain high. Across generations and political lines, there's a hunger for peace, stability, and kindness. Gen Z and liberals are especially drawn to messages of hope and unity, while Boomers and conservatives are prioritizing order amid frustration.

64%

have a positive sentiment about the country, up from 59% in April.

48%

say peace/calm is their top emotional need, followed by stability (45%) and kindness/unity (43%).

25%

report negative sentiment, a drop from 31% in April.

In a climate where every other institution seems fickle, Americans are seeking anchors—**emotional, moral, and local.**



Still Expected

To Step Up

Despite headlines about brand backlash, 75% of Americans across the political spectrum, expect companies to support social and environmental issues. Even among conservatives, only 17% say brands should stay out entirely. The expectation hasn't gone away, but it is evolving. Brand actions need to feel personal, making consumer lives and society better.

75%

of Americans across the political spectrum, expect companies to support social and environmental issues.

17%

say brands should stay out entirely.

People want **less grandstanding and brand actions need to feel personal, making consumers and society better:** Initiatives that are authentic, locally grounded, and measurable.



Loyalty

Is Now Conditional and Relational

As both workplace and consumer loyalty become more conditional, brands can no longer rely on inertia to maintain trust or engagement. Individuals increasingly see themselves as free agents, ready to move on if their values or needs aren't met. This trend is reflected in the fact that nearly half of Americans (49% in Wave 2, up from 47% in Wave 1) have boycotted a brand over its values. The traditional contract, whether between employer and employee or brand and customer, is being rewritten. Loyalty is no longer given; it must be earned, and re-earned, through action and authenticity.

49%
WAVE 2

47%
WAVE 1

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Fear and Caution

A Tempting But Risky, Corporate Response

In this era of heightened scrutiny, it's tempting for organizations to pull back, minimizing their visibility on divisive issues, downplaying their commitments to DEI or ESG, and focusing solely on operational efficiency. But our research shows that fear and silence are not neutral strategies.

Fairness, another way consumers are understanding equity, is seen as both personal and cultural. Our research shows that initiatives need to be implemented at the local community level, which means ESG and DEI commitments need to affect consumers lives as well as the broader world.

Consumers, especially younger, more values-driven demographics, are quick to detect inauthenticity or evasion. The data is unequivocal: 75% of Americans in both waves expect brands to support social and environmental issues; among Gen Z and Millennials, this expectation is even higher.

75%

expect brands to support social and environmental issues.



The New Playbook

Involves Purpose, Transparency, and Local Impact

In this new landscape, the brands that stand out are those that lead with purpose and transparency, even under pressure. The data reveals a shift in how Americans want to see that leadership expressed: less through grand national gestures, more through authentic, community-based action and visible changes in business practices.

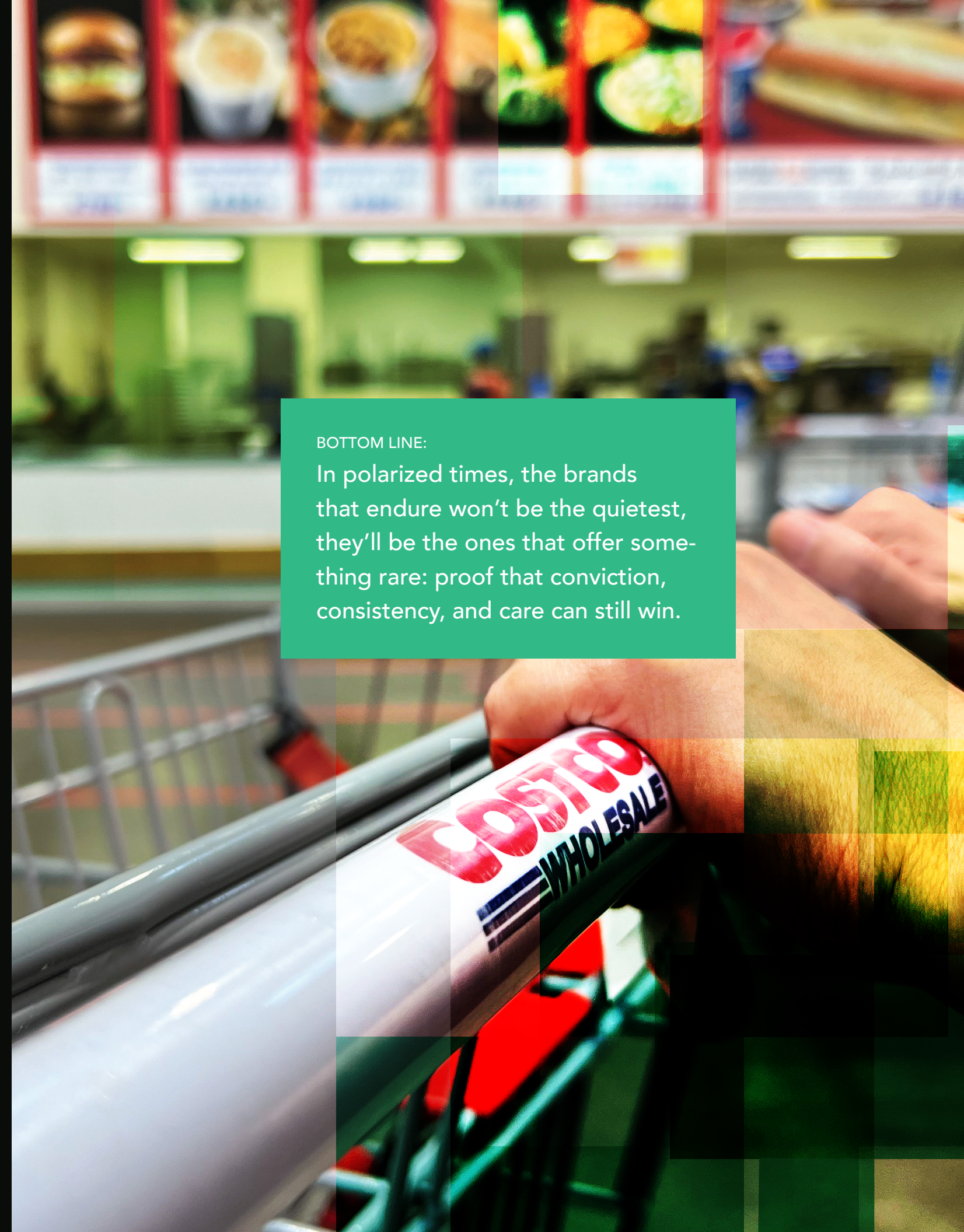
Key motivators for public engagement by citizens/consumers now include feeling safe to live their values (41%) and hearing from leaders who share their beliefs (33%). Meanwhile, the proportion of consumers who don't believe their actions make a difference rose slightly from 38% to 40%, a signal that brands have an opportunity to rekindle hope and agency by showing that corporate action matters.

For the C-Suite: What this Means for You

- **Inaction Is Riskier Than Action:** Silence and hedging erode trust; authenticity and consistency build it, even in polarized times. This means communicating clearly to employees about changes to policy or program changes that are in response to administrative pressure.
- **Loyalty Must Be Earned Daily:** Both employees and consumers are more likely to move on if their expectations for leadership and values aren't met. Continuous communication that connects the dots between business strategies as examples of how the company is living out its values.
- **Local and Community Engagement Drives Relevance:** Americans want to see real impact where they live, not just hear big promises. Challenge your leadership team to redesign national impact programs to include localized implementation and track (and communicate) how you're improving everyday lives.
- **Transparency is Non-negotiable:** Clearly communicate your commitments and progress, even when the path is complex or controversial. If you're going to miss an environmental goal within a specific timeline, be clear about what is changing and how you are pivoting to a new deadline. Don't be silent on this.

BOTTOM LINE:

In polarized times, the brands that endure won't be the quietest, they'll be the ones that offer something rare: proof that conviction, consistency, and care can still win.





Appendix

This PN View was conducted online from July 23-25, 2025, among a sample of 1,014 U.S. adults ages 18 and older.

TOTAL
N=1,014

GEN Z
N=229

MILLENNIALS
N=288

GEN X
N=235

BOOMER +
N=262

LIBERALS
N=255
Describe their political
affiliation as “very liberal”
or “liberal.”

MODERATE
N=317

CONSERVATIVE
N=307
Describe their political
affiliation as “conservative”
or “very conservative.”

OTHER
N=135
Describe their political
affiliation as “other, unsure”
or “prefer not to answer.”

PN View surveys are designed by Porter Novelli. They are programmed and fielded by Big Village using opt-in panel members. Quota sampling is used to collect a nationwide sample of respondents who are then weighted by gender, age, region, race/ethnicity, and education to mirror the demographical composition of the U.S. population using Current Population Survey proportions.

This report presents the main findings. Detailed statistical tables are available under separate cover.

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