

# Two Americas, Two Mindsets:

*The Geography of Brand Connection*



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# Background



“Do Americans think about and relate to brands in the same way?” To answer that question, Bailey Lauerman, in collaboration with leading global independent research firm Radius Insights, fielded *The Geography of Brand Connection* study. Completed in June 2025, the study surveyed nearly 1,000 Americans across demographic, geographic, and political spectrums.



*The Geography of Brand Connection* study leverages a MaxDiff exercise that explores 28 statements around people’s attitudes, beliefs, and perceptions about brands and what is important in their evaluation. Through correlation and factor analyses, the study identifies key attitudinal differences about brands between those primarily living in large U.S. cities and the rest of America. Ben Gau, Vice President of Radius Insights, added, “We wanted to ground this conversation in data, not assumptions. What emerged is a much more layered understanding of how people across the country actually make decisions about the brands they let into their lives.”

# Executive summary

Findings from *The Geography of Brand Connection* study indicate that geography plays a major role in how people think about and engage with brands. The study reveals two dominant brand mindsets in America: **Pragmatists** and **Experientialists**. While not shaped by education or income levels, these mindsets have strong geographical skews and shape how people evaluate brands, make purchases, and form loyalties.



*Mindset 1*

## PRAGMATISTS

Represent approximately 52% of the total U.S. adult population. Data suggests this mindset permeates midsized cities, small towns, and rural areas. Pragmatists are grounded, thoughtful consumers who prioritize practicality and reliability over trends. More conservative in their views, they view brands with a critical eye, seeking products and services that offer clear, consistent value over time. While digitally connected, they are cautious online, relying on information and reviews rather than more emotive, values-led campaigns. For Pragmatists, brand loyalty is earned through transparency, consistency, and quality.



*Mindset 2*

## EXPERIENTIALISTS

Representing approximately 48% of the total U.S. adult population, tend to be younger, more moderate politically, and often live in large cities. They form deep emotional connections with brands and are willing to pay more for products that align with their personal values. This group stays on top of cultural trends, follows influencers, and enjoys experimenting with new products and experiences. Experientialists are socially engaged and active online, openly sharing their opinions. They expect brands to take a stand on social and political issues, seeing advocacy as an essential part of a company's role.

Relationship with Brands	Pragmatists	Experientialists
View brands as credible	26%	47%
See brands as part of identity	30%	55%
Follow trends	20%	43%
Follow influencers	7%	29%

**Based on the study's data, Experientialists have a significantly more integrated and engaged relationship with brands than Pragmatists.**

Nearly half of Experientialists view brands as credible (47%) and see them as part of their identity (55%), demonstrating a strong personal connection. This group is also highly influenced by external factors, with a majority following trends (43%) and a substantial portion following influencers (29%). In contrast, Pragmatists maintain a more detached relationship with brands, with only 26% viewing them as credible and 30% seeing them as part of their identity. Their engagement with trends (20%) and influencers (7%) is notably low, highlighting a consumer group that is less swayed by brand narrative and outside influence.

**For Pragmatists, who value practicality and a functional relationship with brands, the focus should be on establishing a “reliability core.”**

This means leading with clear, rational messaging that highlights consistent quality, transparent pricing, and a strong customer-service reputation. “Marketers often jump straight to big cultural statements,” said Gau. “Our data suggests doing something different: prove you can solve everyday problems first—then you earn the right to play a bigger role in people’s lives.” With that in mind, marketing efforts should address the needs of Pragmatists directly, rather than through the assumed starting point of emotional storytelling. In terms of social proof, agencies should utilize sources that Pragmatists find trustworthy and grounded, such as locally credible validators, long-tenured customers, employee testimonials, and known third-party accolades.

In contrast, Experientialists respond to a more culturally fluent and identity-driven brand narrative. Since they see brands as part of their identity and are in tune with relevant trends, marketing strategies built to be agile and mindset-based through dynamic storytelling that connects with Experientialists’ values and lifestyle through creators, user-generated content (UGC), and influencer formats will help build relationships with these consumers through social currency.



**A brand's geographic business footprint can serve as a valuable starting point for understanding and activating these differing mindsets.**

Companies with a strong presence in major metropolitan areas with a high concentration of younger, trend-focused consumers might lean more heavily on values-based experiential marketing, while a brand with a strong presence in a more suburban or rural area might build platforms and programs oriented around the more rational components of its value formula. Ultimately, success lies in recognizing that different audiences have different priorities, and in designing related communications strategies that are both everyday-relevant and culturally attuned.



# Pragmatists vs. Experientialists: a consumer mindset divide

More than just purchasing habits, these mindsets are rooted in fundamental differences in how these groups perceive themselves, their communities, and the role brands play in their lives. Below is a look at how the extreme ends of Pragmatists and Experientialists differ across a range of categories.



## *Mindset 1*

## PRAGMATISTS

### Geography, Demography, and Self-Identity

- **66%** live in rural or small-town communities
- **99%** describe themselves as “regular, down-to-earth people”
- **96%** prioritize family, community, and stability over personal goals
- **56%** are female
- **53%** are married
- **40%** identify as conservative, **32%** as moderate, and **24%** as liberal

### Optimism, Institutional Credibility, and Involvement in Social Issues

- **52%** are optimistic about the future of their community over the next five years
- **26%** find brands credible in what they say and do
- **51%** believe brands should remain neutral and avoid involvement in political or social issues

### Brand Expectations and Loyalty

- **85%** prioritize honesty and transparency from brands
- **83%** value consistency in products and services
- **5%** prefer to support brands that align with personal values

In an era where many brands lean heavily on emotional storytelling and social activism to engage consumers, brands like Patagonia and McDonald's also recognize the importance of initiatives tailored to the Pragmatist mindset. By building more visible, rational elements into their brands, initiatives like Patagonia's “Worn Wear” program and McDonald's “McValue” platform effectively build trust and loyalty with this audience by prioritizing long-term value, durability, and straightforward pricing.

## patagonia®

### “Worn Wear” Program:

Though Patagonia is in many ways an Experientialist brand, its Worn Wear program lands with Pragmatists by promoting repair and longer product life. Free fixes and tutorials prove durability and long-term value while avoiding waste.

([SOURCE 1](#), [SOURCE 2](#))



### “McValue” Platform:

The summer '24 \$5 Meal Deal evolved into an always-on 2025 McValue platform—transparent combo pricing, simple choices (e.g., “buy one, add one for \$1”), plus consistent app-based and regional offers. It shifts value from a promo to a reliability promise that Pragmatists trust.

([SOURCE](#))

*Mindset 2*

## EXPERIENTIALISTS

**Geography, Demography, and Self-Identity**

- **63%** live in America's 10 largest cities
- **38%** describe themselves as "regular, down-to-earth people"
- **35%** prioritize family, community, and stability over personal goals
- **55%** are male
- **40%** are married
- **25%** identify as conservative, **42%** as moderate, and **28%** as liberal

**Optimism, Institutional Credibility, and Involvement in Social Issues**

- **45%** are optimistic about the future of their community over the next five years
- **47%** find brands credible in what they say and do
- **36%** believe brands should remain neutral and avoid involvement in political or social issues

**Brand Expectations and Loyalty**

- **69%** prioritize honesty and transparency from brands
- **64%** value consistency in products and services
- **36%** prefer to support brands that align with personal values

Unlike Pragmatists, who prioritize a brand's functional reliability, Experientialists are a consumer group that engages with brands as a reflection of their personal identity and cultural fluency. As such, programs like the Meta + Ray-Ban smart-glasses partnership and Dunkin's collaboration with Ice Spice and Ben Affleck resonate deeply by offering more than just a product; they provide tools for self-expression, tap into viral cultural moments, and leverage the power of influencer-driven social proof to become an integral part of Experientialists' lifestyles.

**Smart Glasses Partnership:**

Based on smart glasses that look like regular shades but add hands-free photo/video, built-in speakers, and an AI assistant. This fashion-forward creator tool for quick posts and real-time storytelling resonates with younger, trend-aware, influencer-attuned consumers who treat brands as extensions of their identity and will pay for lifestyle fit.

([SOURCE](#))

**Collaboration with Ice Spice and Ben Affleck:**

A culturally sharp collaboration that premiered a custom Video Music Awards spot and rode viral social posts to amplify buzz. The data-driven influencer pairing effectively reached younger Experientialist audiences who follow creators for recommendations.

([SOURCE 1](#), [SOURCE 2](#))



# Brands winning across mindsets

Navigating the differences between Pragmatists and Experientialists is a central challenge for brands seeking broad appeal in a fragmented market. While many brands tend to gravitate toward one mindset or the other, a select few have successfully built meaningful connections across both segments. The key to bridging these brand-relationship differences lies not in appealing to one group over the other, but in embodying a set of universal attributes that resonate with the core values of both mindsets. Brands that achieve this balance become integral, reliable parts of consumers' lives, earning widespread loyalty and overcoming the typical barriers of brand segmentation.

*The Geography of Brand Connection* study identified brands that have successfully built this cross-mindset connection, as well as the attributes that enable them to do so. The most successful brands are those that are integrated into daily life and represent reliability and consistency, while the least successful are often perceived as exclusive or niche.

## TOP FIVE BRANDS WITH HIGHEST SHARED AFFINITY:

	63%
	58%
	42%
	36%
	35%

## BOTTOM FIVE BRANDS WITH LOWEST SHARED AFFINITY:

	9%
	10%
	10%
	12%
	14%

## LEADING ATTRIBUTES OF TOP PERFORMERS:

CONSISTENT	42%
AUTHENTIC	40%
MAINSTREAM	40%
RELEVANT	39%
TRUSTWORTHY	38%

Ultimately, brands that successfully bridge the mindset gap do so by embodying a core set of attributes that signal stability and integrity rather than disruption or controversy. They focus on being consistent, authentic, and trustworthy—traits that are universally valued by both Pragmatists and Experientialists. The most connected brands become a reliable, everyday presence by meeting expectations and communicating with transparency. In contrast, brands perceived as elitist, edgy, or outspoken tend to alienate broad audiences, as these traits often clash with the preference for neutrality and down-to-earth reliability, demonstrating that brands that foster unity and familiarity earn the widest and most enduring loyalty.



# Giving back: everyone agrees in concept, but not in execution

While Pragmatists and Experientialists differ in many ways, they do share one belief about brands: they have a responsibility to “do good,” with 37% of Experientialists and 38% of Pragmatists saying brands have a responsibility to give back to the community. With nearly equal percentages of both groups believing that brands have an outsized influence on culture and politics, 33% and 28% respectively, there is an expectation that brands will leverage their broad visibility and immense resources for good.

## However:

### *Only 24%*

of Experientialists believe that brands should actively take a stand on social and political matters. For Pragmatists, that number shrinks to 11%.

### *Instead, 36%*

of Experientialists and 51% of Pragmatists believe brands should remain neutral and avoid involvement in political and social issues.

But amid the severe political division in America, there is a way forward for brands. In 2024, Bailey Lauerman's [\*Unifying America Through Shared Values\*](#) study found that nearly 50% of U.S. adults saw brands as capable of fostering connection and healing societal fragmentation. The study identified five shared values that cut across age, education, geography,

and political affiliation: protected freedoms for all, love of country, hard work, truth and honesty, and respect and tolerance for differences. By reminding Americans of these shared values in balanced ways and creating opportunities for shared community experiences, brands can be seen as positive contributors to community and country.

# Strategies for crossing geographic and perceptual borders

To effectively scale nationwide, brands must understand and adapt to dramatically different mindsets that exist across the vast U.S. geography. By first recognizing that Americans don't have universally consistent relationships with brands, marketers can build and prioritize different elements of their brands to appeal to both the Pragmatist and Experientialist mindsets. The following five strategies outline how brands can achieve this balance.

1

## Think Beyond Advertising

Understanding the Experientialist and Pragmatist mindset composition of a business has implications well beyond advertising. From policy and customer-service strategies to packaging and retail design, marketers should be thinking holistically about both what their brand says and how it behaves in the world and through its relationship with customers, recognizing engagement, purchase decision, and loyalty drivers of the two mindsets.

2

## Build Multiple Communication Frameworks and Journeys

Craft messaging architectures and integrated customer journeys that speak to both Pragmatists and Experientialists by breaking the traditional funnel assumption that everyone follows the “emotion, then logic” pathway to brand relationships, and instead build different journeys that focus uniquely on the needs of both mindsets.

3

## Establish a Brand Reliability Core

Identify and communicate the tangible rational benefits that often get deprioritized, such as dependable quality, transparent pricing, or excellent service. While often assumed or overlooked, this messaging pillar helps deliver on cross-segment requirements of being consistent, authentic, relevant, and trustworthy. They're also the price of admission for Pragmatists who reward honesty with loyalty while signaling real-world credibility to Experientialists.

4

## Run a Two-Track Social Plan

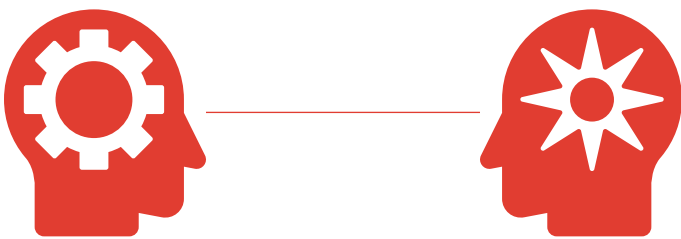
For Pragmatists, who rarely follow influencers, brands should elevate credible validators such as long-tenured customers, local leaders, employees, and third-party accreditations. For Experientialists, who are trend-aware and vocal online, use creators, user-generated-content prompts, and interactive formats. House all of it under one “proof system” (reviews, ratings, testimonials, etc.) so each audience can choose its own best forms of proof and validation.

5

## Frame Community Initiatives on Shared Values

Community support and giving back should be at the heart of every brand. To avoid the risk of alienation, this work needs a clear, strategic framework rooted in shared American values like hard work, trust and honesty, and respect for differences. When brands tie their initiatives together with consistency and transparency, they avoid chasing the “issue of the day,” instead standing for something lasting. This approach strengthens legitimacy and avoids being seen as “outspoken” or “elitist.”

# Conclusion



*The Geography of Brand Connection* study reveals significant differences in how Americans relate to brands through the identification of two dominant mindsets: Pragmatists and Experientialists. Pragmatists, living primarily in mid-sized cities, small towns, and rural areas, value reliability and function over emotional connection, largely viewing brands with skepticism. In contrast, Experientialists, concentrated in America's largest cities, see brands as an extension of their identity and are heavily influenced by cultural trends and social causes.

To connect with both groups, brands must adopt a two-pronged strategy. While Pragmatists respond to messaging that highlights a “reliability core” (consistent quality, transparent pricing), Experientialists are engaged through identity-driven, culturally relevant narratives. The most successful brands, such as Amazon and Walmart, transcend this divide by being universally trusted and consistent, rather than being perceived as edgy or exclusive, demonstrating that shared, foundational values earn the broadest loyalty and respect across the complex quilt-work of the American consumer landscape.