

# MARKETING IN ANXIOUS TIMES

*It's Not Just People's Behaviors That  
Have Changed, It's Their Psychology Too*

*May 2020*

**npa**





The Behavioral Science Group has put together a POV on marketing in these anxious times. Check it out on the RPA website!

*Before we can understand what to do as marketers, we have to understand people! The full RPA Behavioral Science report contains a collection of psychological insights and corresponding marketing implications—to help us better empathize with people, anticipate their future behaviors, and stay connected with them in a relevant and effective way.*

## THE THRUST OF THE REPORT: IT'S A BRAVE NEW WORLD

Times of mass anxiety are also times of tremendous opportunity. People's emotions are changing, their lifestyles are changing, their needs and wants are changing, and their priorities and values are even starting to change. Which means people are seeing the world—and everything in it—in a brand-new light.

From a marketing perspective, this means we may lose customers, or we may gain customers. It means we may start to seem irrelevant to people, or suddenly relevant. It means we may need to talk to people in new ways. And find them in different places.

If Phase 1 for marketers was pulling certain work, and then telling people “we are here and we support you,” then Phases 2+ must be swift to follow: We need to recognize there is a huge brand shakeup right now. And brands that don't act quickly will miss opportunities.

Brands needed to “be there” when the pandemic first hit. They needed to show empathy and lend a hand. And they needed to respond with rapid fire to changing habit cycles, by optimizing both their communication and their distribution.

But it's not just people's behaviors that have changed, it's their psychology too. Which opens up more opportunity if brands are willing to take action. Brands can play a vital role right now by helping people connect with others, helping them feel empowered, and helping them tap into passions and purpose. And they can resonate powerfully by responding to emerging values. Because brands that “stay with people” during all the rough patches just might win.

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HELP PEOPLE TO  
"LOOP A HABIT"**



**LONG-TERM STRATEGY:  
LOOK FOR SHIFTS IN  
PEOPLE'S MOTIVATIONS**

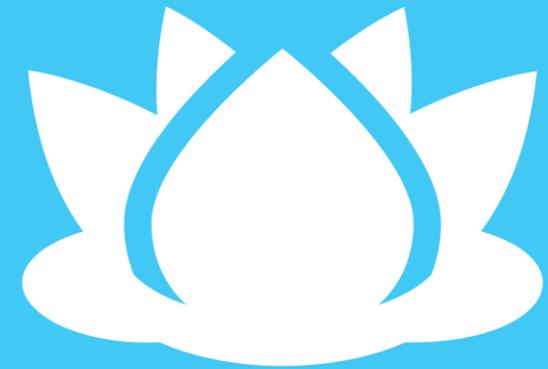


**LONGER-TERM THINKING:  
PREPARE FOR SHIFTS  
IN PEOPLE'S VALUES**



# THESE ARE VOLATILE TIMES: HELP PEOPLE FEEL GROUNDED

The impact of the recent coronavirus (COVID-19) cannot be overestimated. People have been processing a lot, and there has been huge behavioral and psychological fallout. We are already several months in, but brands need to stay vigilant in how they respond. Brands should stay present, provide stability, and avoid making assumptions about what people are feeling.



# NOT JUST VOLATILE BUT UNIQUELY COMPLICATED

## BEHAVIORAL OBSERVATIONS

### PEOPLE'S MINDS ARE RACING:

- Personal health
- Personal finances
- Friends and family
- Public health issues
- The overall economy
- Local businesses and community
- Mental health effects
- World politics
- The future of the world

### AND PEOPLE ARE LEAPING FROM ONE PSYCHOLOGICAL REACTION TO THE NEXT, SOMETIMES SKIPPING STEPS OR BACKTRACKING:

- Denial
- Panic
- Knowledge immersion
- Social calibration
- Depth insight
- Internalized change

# HOW TO MARKET RIGHT NOW: STAY WITH PEOPLE AND ANTICIPATE THE SHIFTS

## INSIGHTS FOR MARKETERS

### BRANDS SHOULD STAY IN THE CONVERSATION BUT REMAIN SENSITIVE TO EVER-CHANGING HEADSPACES, NEEDS, AND WANTS

People have been processing a lot since March, and different people will respond in different ways over the coming months. It's important that brands "stay in the conversation" and provide stability and support throughout; research from Kantar, Twitter, Edelman, Harris, and many others shows that brand presence is wanted. Brands should look for messages that will work universally, but also keep a close eye on where their customer's heads are and watch for emerging opportunities.

IN TALKING TO PEOPLE:

**DON'T** tell people there's a right or wrong way to react. A huge range of responses is normal and healthy.

**DON'T** pigeonhole (or "behaviorally target") people as one kind of responder vs. another. People's take on the situation will change as their personal situations and experiences change.

**DO** project confidence in communicating with people: Ace Metrix found that 75% of people believe brands have a responsibility to help out during this pandemic. Be confident in being there!

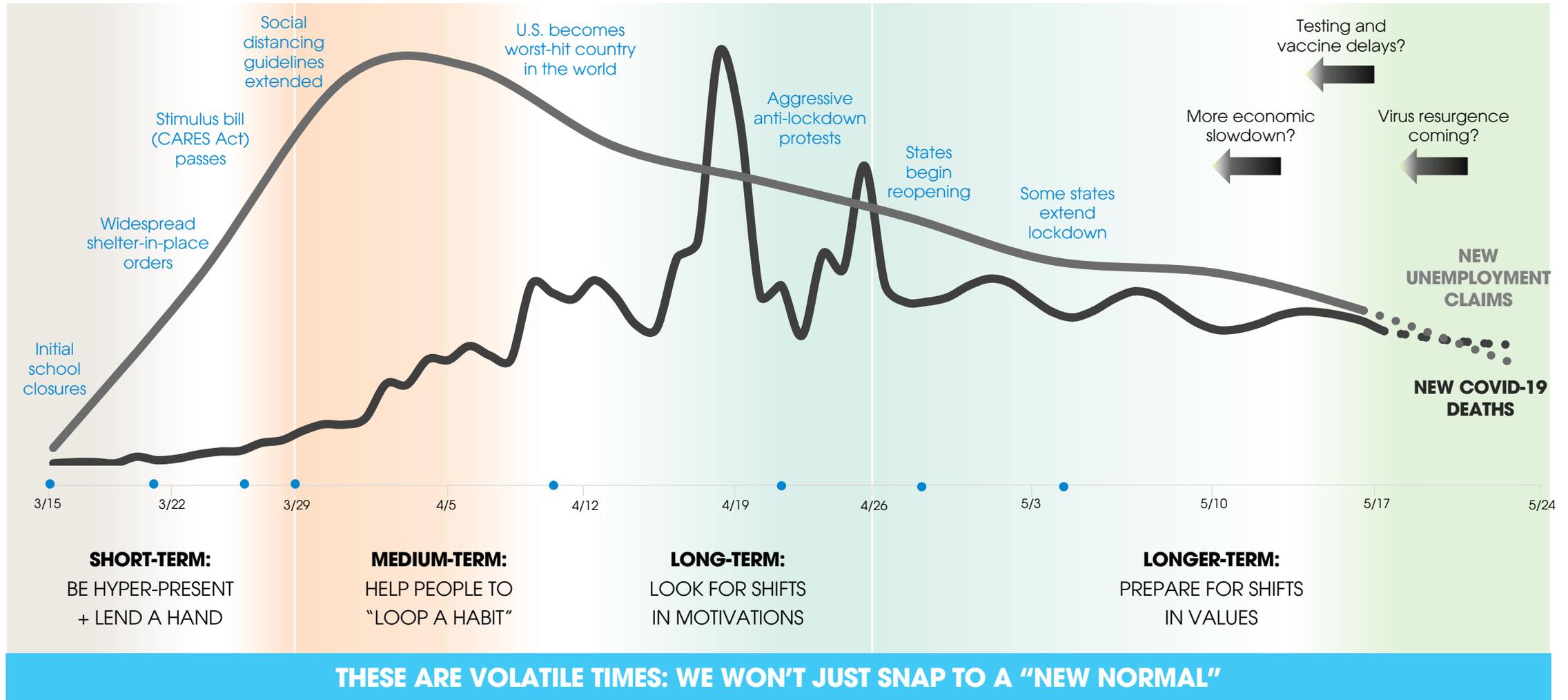
**DO** expect customer segmentations to work a bit differently than usual—people's emotional styles may be bigger drivers of their behaviors than things like brand loyalty, gender, age, or even income.

**DO** consider, and plan for, alternative marketing scenarios in terms of how your core customer will react to the pandemic over the long-term.

**DO** communicate in a way that "works" for multiple emotional styles—and makes no presumptions at all about how people might be feeling.

Source: <https://www.edelman.com/research/covid-19-brand-trust-report>

# WHERE ARE WE NOW?



Sources: Johns Hopkins Center for Systems Science and Engineering (Daily Total Deaths), IHME (Daily Total Death Projections), Department of Labor (New Unemployment Claims), Trading Economics (New Unemployment Claims Projections)

# SHORT-TERM STRATEGY: BE HYPER-PRESENT + LEND A HAND

Early on in the pandemic—and at any point people are knocked back into a survivalist mindset—the right response from brands is simple: Avoid complex and future-focused messages. Stay hyper-present. Help people get through the immediate moment.



# SHORT-TERM STRATEGY: BE HYPER-PRESENT + LEND A HAND

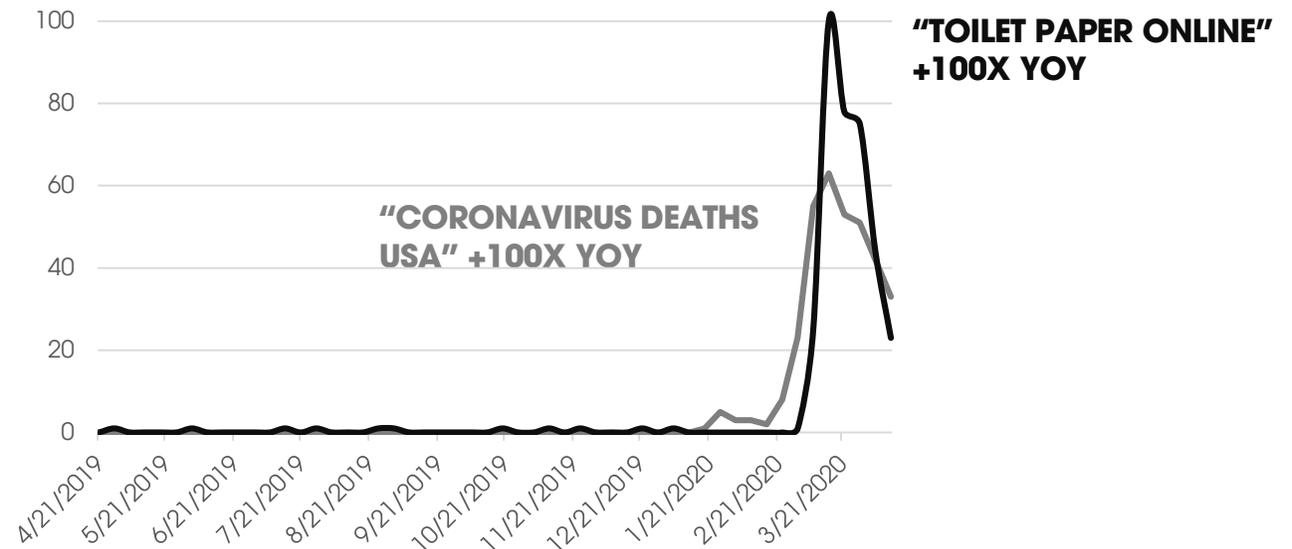
## BEHAVIORAL OBSERVATIONS

**WHEN PEOPLE ARE DODGING BULLETS THEY ARE GENERALLY UNCONCERNED ABOUT WHAT MOVIES ARE COMING OUT NEXT MONTH** and couldn't care less about the carbs in the muffin they ate that morning. They are attuned instead to the present moment—not the past nor the future—and they are laser-focused on concrete, specific, and immediately relevant information.

Panic buying, repeated searches for case counts, and concern about job security all peaked in mid-to-late March.

### Google General Search Trend

Peak: Weeks of 3/15 and 3/22



# SHORT-TERM STRATEGY: BE HYPER-PRESENT + LEND A HAND

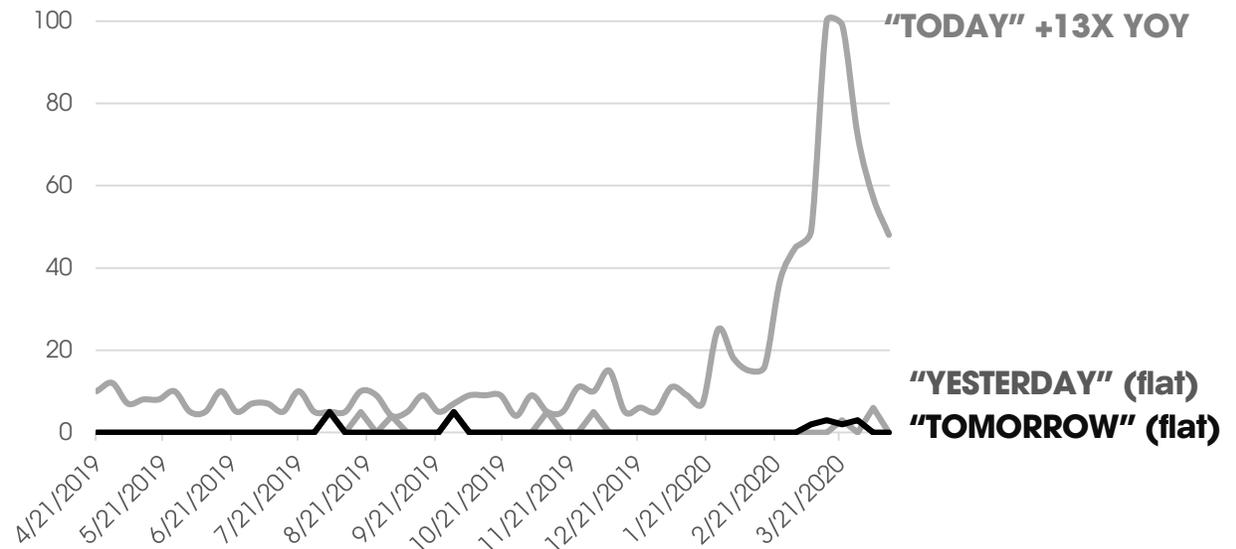
## BEHAVIORAL OBSERVATIONS

This **HYPER-PRESENT ATTENTION** is a touchstone of human cognition in times of threat. And when threats are unfamiliar (and therefore unpredictable), people turn especially hyper-present. Witness the desire for concrete, specific hand-washing instructions (vs. general hygiene messages).

And witness the surge on Google in March of searches for "today" (vs. "yesterday" and "tomorrow"). In the panic phase, the "reptilian" brain is fully fired on: People focus on what they can see, and easily understand, that's directly in front of them.

### Google Health News Search Trend

Peak: Weeks of 3/15 and 3/22



# SHORT-TERM STRATEGY: BE HYPER-PRESENT + LEND A HAND

## INSIGHTS FOR MARKETERS

### IS THIS STAGE OVER YET?

Don't blink—it happens that fast for many people! But for many others, there may be months of panic, or waves of panic may ebb and flow (these are volatile times). If you sense panic at all:



**DON'T** say something that any other brand could say—brands must stay true to themselves to break through and be believed.



**DO** act quickly. When people feel under attack, days are as long as weeks and weeks are as long as months.



**DO** keep up to date with what's happening and be sure to monitor the appropriateness of communications.



**DO** walk the talk. Actions speak louder than words. And people are sensitive to false empathy. Don't say you care unless you can prove it – claims of empathy must "hold up" under scrutiny.



**DO** prove yourself helpful. A quick hack, a timely recommendation, or a simple message of support can go a long way when people are feeling stressed.



**DO** communicate in a "reptilian-friendly" way: Simple, direct, relevant to people's immediate context, focused on actions rather than ideas, and accompanied by simple visuals whenever possible.

# STAYING WITH PEOPLE, AND MOVING "BEYOND EMPATHY" ...

## INSIGHTS FOR MARKETERS

92%

of people think brands should keep marketing, and stay in the conversation

65%

say their likelihood of purchasing a brand long-term depends on how well the brand responds now

**BUT MANY ARE ALSO SAYING:**

**"EVERY COVID-19 COMMERCIAL IS EXACTLY THE SAME..."**



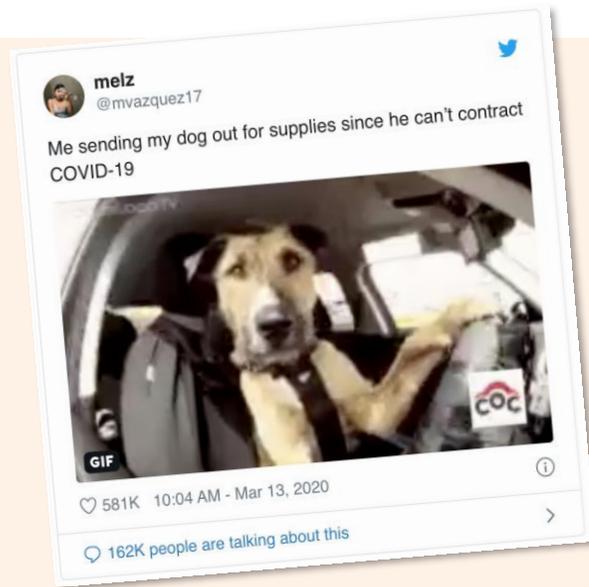
Sources: Marketing Week, <https://www.marketingweek.com/brands-advertising-coronavirus-crisis/>, Harvard Business School, <https://hbswk.hbs.edu/item/what-customers-need-to-hear-from-you-during-the-covid-crisis>, Summary of Luth Proprietary Research, reported 4/13/2020

# MEDIUM-TERM STRATEGY: HELP PEOPLE TO “LOOP A HABIT”

As new routines take hold, brands need to protect established brand habits and seize the opportunity to grow new ones. The first window of opportunity was in late March to early April, but habits are continuing to “settle” even as we move into the summer months.



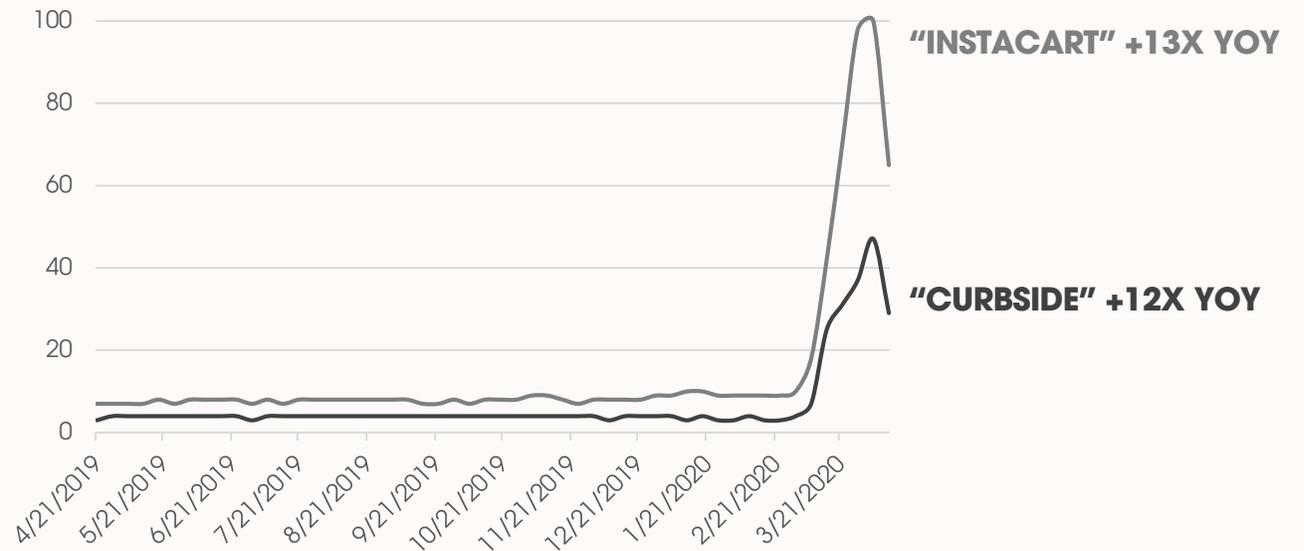
# HABITS HAVE ALREADY BEGUN TO CHANGE



- New shopping and buying behaviors showed clear spikes in early April
- By mid-April 67% said they'd tried a new product since the pandemic hit
- And 58% said they'll stick with a new brand long-term

## Google General Search Trend

Peak: **Weeks of 3/29 and 4/5**



Sources: Center for Science in the Public Interest, [https://thefern.org/ag\\_insider/a-trip-to-the-grocery-is-risky-business-for-most-americans/](https://thefern.org/ag_insider/a-trip-to-the-grocery-is-risky-business-for-most-americans/), mFour, [https://get.mfour.com/quarantine-insights/?utm\\_source=hs\\_email&utm\\_medium=email&utm\\_content=86589227&hsenc=p2ANqtz-9FWV84wC-EyLnu5f5LdQZhg8ejC3Ak2wkeogNdp5dQWn1fo9e\\_hsO3GWRurKX-MEBFs-wejFMZCC5wfZ9nILL4tCAZg&\\_hsmi=86589227](https://get.mfour.com/quarantine-insights/?utm_source=hs_email&utm_medium=email&utm_content=86589227&hsenc=p2ANqtz-9FWV84wC-EyLnu5f5LdQZhg8ejC3Ak2wkeogNdp5dQWn1fo9e_hsO3GWRurKX-MEBFs-wejFMZCC5wfZ9nILL4tCAZg&_hsmi=86589227)

# IN FACT, ALMOST EVERYTHING IS IN FLUX, WITH CHANGES IN MANY DIRECTIONS ALL AT ONCE

## HUGE SHAKEUP IN PRODUCT PURCHASES AND DAILY ACTIVITIES:

- More gardening
- More home cooking
- More crafting
- More self-care
- More walking
- More all-family activities
- Alcohol sales (+243%)
- Marijuana sales (+130%)
- Videogame sales (record-setting)
- Overeating (“COVID-15”)
- TV binge-watching
- ...

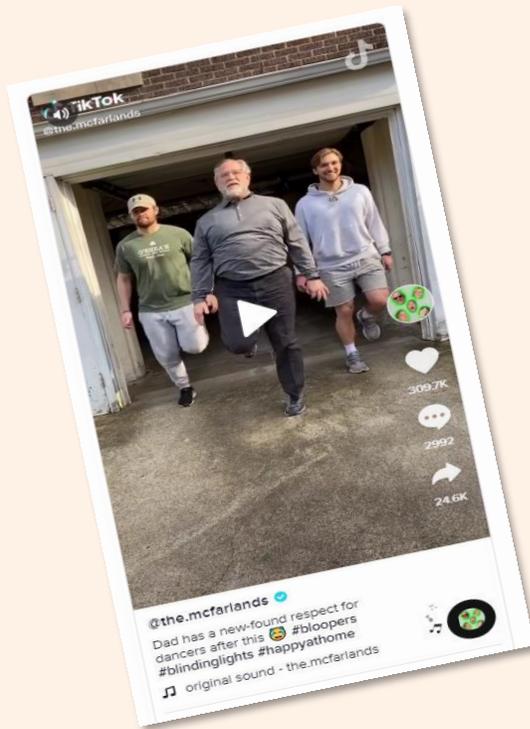
## HUGE SHIFTS IN TECH USAGE AND SERVICE FORMATS:

- More grocery delivery
- More online banking
- More telemedicine
- More working from home
- More online worshipping
- More Zoom-based socializing
- More livestream education
- More talking on the phone
- More online video
- More streaming music
- ...

**THINGS WILL SETTLE FOR MONTHS TO COME, BUT MANY NEW PATTERNS WILL STICK**

# MACRO-SHIFTS AND WEEKLY EXPERIMENTATION MEAN THAT IT'S "OPEN SEASON" FOR NEW HABITS TO TAKE HOLD

**Don't forget all the Boomers who came onto TikTok!**



## IN PLANNING FOR CHANGING HABITS, WE CAN START BY THINKING BROADLY:

- What macro-shifts are most relevant?
- Are there new customer groups?
- Are there new ways of coming to market?
- New ways people are thinking about/using the brand?
- New messages that will resonate and motivate?
- And, of course, how can we make it stick?

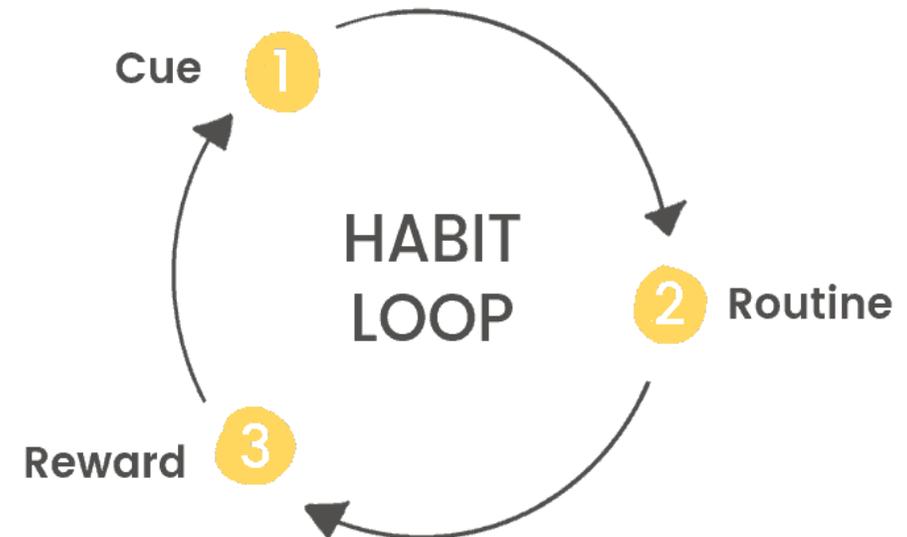
# THE CHALLENGE (AND OPPORTUNITY) IS SECURING A POWERFUL HABIT LOOP

## BEHAVIORAL OBSERVATIONS

With virtually all of life's routines currently disrupted by the COVID-19 pandemic, people's **HABIT LOOPS** are likely to change: **Some may weaken and ultimately break apart, while others may get stronger, and still others may be born.**

For example, people who swing by Starbucks on their morning commutes may forego fancy coffee during WFH protocols, and, as weeks pass, ultimately decide (consciously or unconsciously) that fancy coffee is a non-necessity; even when daily commutes are restored, they may never return to \$6 coffee. And this same kind of pattern, of course, can be imagined for a myriad of businesses. Consider that, according to McKinsey, 34% of people who switched to lower-priced products during the Great Recession ended up actually preferring those less-expensive products years later—even when they could afford pricier options.

But there are two sides to this coin: While working from home, people may adopt new habits—for example, drinking green tea in the afternoons, or having whole beans home-delivered. Such habits can be sustained long-term if they become strong enough, and if the right cues continue to be available. The critical point: For every habit lost there is opportunity for new habit gain.



# THINK ABOUT PROTECTING EXISTING HABITS

## INSIGHTS FOR MARKETERS



**DON'T** assume that people will think about your brand in the same way over time, as their habits start to shift: Your brand might start to seem like a luxury vs. an everyday purchase (e.g., fancy coffee), or an everyday purchase vs. a luxury (e.g., grocery delivery), a treat vs. a chore (e.g., outdoor fitness), a chore vs. a treat (e.g., home baking), or something else altogether. People might even start to see your brand as part of a different competitive set or category. Which means, even if you do nothing, people may start to see your brand very differently as habits change.



# THINK ABOUT PROTECTING EXISTING HABITS

## INSIGHTS FOR MARKETERS



**DO communicate regularly** with people to maintain their loyalty to the brand. When habits get disrupted, people engage in more conscious thought—e.g., thinking through options they may not normally consider. Even when you’ve already built a solid habit with customers, going silent creates a vulnerability.



**DO think about new formats:** If people can’t come to your store, studio, or restaurant right now, make sure you are finding ways of staying “in the loop” through social media challenges, livestream events, or other efforts.



**DO consider longevity.** Make sure habit loops can withstand continued shifts to people’s situations, and allow time for different patterns to take hold (typically about 4 to 6 weeks).



**DO make it easy** for people to maintain the habit; the less effort and work that’s needed from them, the better. Think about their current headspace and living situation.

# THINK ABOUT HELPING PEOPLE BUILD **NEW HABITS**

## INSIGHTS FOR MARKETERS



**DO consider all of the new needs and wants that may be emerging right now** (e.g., an

increased need for clear work-home boundaries, an increased desire for more private spaces in the home), as well as all of the new rituals that may be taking hold (e.g., more “mommy-and-me” activities, the sudden trend of daily nature walks, a new evening ritual of #quarantinecocktails, more frequent phone calls with extended family, more cooking at home). These are all fertile territories around which to build new brand habits.



**DO think about different types of habits** that might be important for your brand (not just buying habits):

- Shopping habits
- Usage norms/habits
- WOM habits
- Research habits



**DO consider product discovery** and the need for people to be able to come across your brand even if they are not out and about

# THINK ABOUT HELPING PEOPLE BUILD **NEW HABITS**

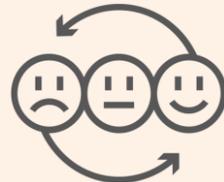
## INSIGHTS FOR MARKETERS



**DO focus more on the cue than the ritual.** Make sure you **own your cues.** And make sure that you **use cues consistently.** But think carefully about the kind of cue that can work right now (and continue to work long-term). Cues that work best are almost always **things that happen regularly,** and are almost always tied to one of the following:



Time of day  
or day of week



State of mind  
or mood



Other people  
who are present



Location or type  
of environment



Immediately  
preceding action

# THINK ABOUT HELPING PEOPLE BUILD **NEW HABITS**

## INSIGHTS FOR MARKETERS



**DO consider the rollout of habits** and use rollout tactics that have been shown by behavioral research to help new habits take hold:



Make it rewarding!



Connect it to existing habits



Let people start slow and work up



Consider gamifying it



Give people some time



Adjust based on the audience

## **BONUS INSIGHT: HABITS THAT HELP PEOPLE LEARN SOMETHING NEW ALSO HELP THEM TO COPE BETTER WITH STRESS (POSITIVE BRAND RUB-OFF EFFECT)**

*“Although relaxation is a response that individuals might be inclined to turn to for counteracting [stress], when it comes to addressing negative emotions ... building positive resources by learning something new ... could be more useful.”*

- Zhang, Mayer & Hwang (2018)

Source: Journal of Applied Psychology, <https://www.ncbi.nlm.nih.gov/pubmed/28933912>

# LONG-TERM STRATEGY: LOOK FOR SHIFTS IN PEOPLE'S MOTIVATIONS

As social roles, lifestyles, and identities shift, key motivations are shifting too. Brands can play a vital role by helping people make connections with others, by enabling them to feel empowered and useful, and by creating opportunities for them to explore passions, skills, and purpose.



# LONG-TERM SHIFTS IN MOTIVATIONS: THREE EMERGING DRIVES

## BEHAVIORAL OBSERVATIONS

In the long term, not only will people's behaviors start to change, but their lifestyles, roles, and social identities—their sense of who they are and what their role is in society—will in many cases evolve too. These shifts will lead to new motivations that are highly relevant to marketers. Three emerging motivations:



### **DRIVE FOR SOCIAL CONNECTEDNESS**

"I didn't realize how much I'd miss ..."  
"Who can I really trust right now...?"



### **DRIVE FOR PERSONAL EFFICACY**

"I feel like I'm wasting time right now..."  
"I should be doing something to help..."



### **DRIVE FOR PURPOSE AND PASSION**

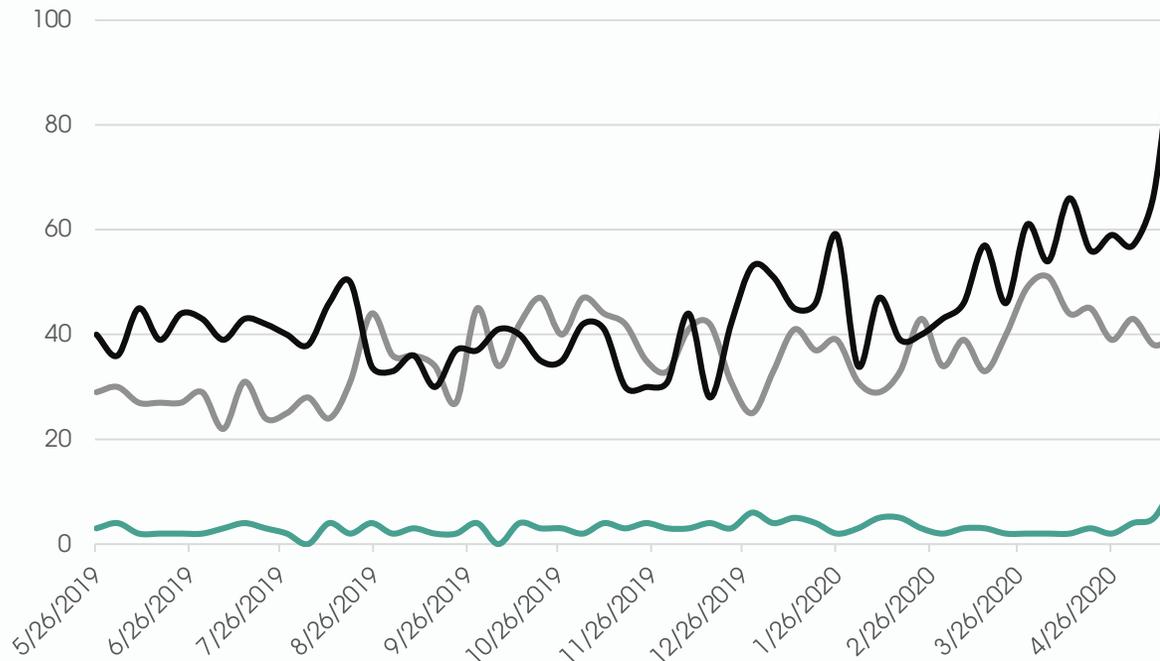
"This feels like a test..."  
"What do I ultimately care about?"

# EARLY EVIDENCE OF SHIFTING MOTIVATIONS STARTING TO SURFACE

## BEHAVIORAL OBSERVATIONS

### Google General Search Trend

Peak: Starting week of 4/12 and continuing



**"HOMESTEADING" (purpose and passion)**  
**+150% YOY**

**"EXTENDED FAMILY" (social connectedness)**  
**+31% YOY**

**"HELP OTHER PEOPLE" (personal efficacy)**  
**+300% YOY**

# LONG-TERM SHIFTS IN MOTIVATIONS: DRIVE FOR SOCIAL CONNECTEDNESS

## BEHAVIORAL OBSERVATIONS

As the pandemic progresses, it is starting to shift both how connected people feel to others, AND who they feel most connected to. Multiple, disparate forces are driving this:

- People have an instinct to bond together with others during times of stress
- In quarantine, depression and anxiety are on the rise, and many people are feeling extraordinary loneliness
- Certain social identities are being strongly primed by the media (e.g., Young vs. Old, Chinese vs. American, Prepared vs. Unprepared, Essential vs. Non-Essential, Haves vs. Have-Nots)
- Some people are responding to the pandemic by clinging more strongly than ever to insular belief systems, becoming more fanatical and xenophobic—there’s a rabid search in some quarters for a scapegoat, and wartime metaphors are everywhere
- Some are feeling a powerful sense of “human identity” and “universal experience” (i.e., the Independence Day effect)
- New social groups and identities are also emerging (e.g., those in favor of opening up the economy right away vs. those opposed)



# LONG-TERM SHIFTS IN MOTIVATIONS: DRIVE FOR SOCIAL CONNECTEDNESS

## BEHAVIORAL OBSERVATIONS

Since stay-at-home orders have taken effect, yearning for interpersonal connectedness has been on the rise:

**77%**

have felt

**COMPASSIONATE**

*“taking the time to check in with the people I care about”*

**75%**

have felt

**APPRECIATIVE**

*“to be around people I truly care about”*

**53%**

have felt

**MORE BONDED**

*“I will become closer to my family and friends”*

Sources: The Harris Poll, [https://theharrispoll.com/wp-content/uploads/2020/04/Wave-2-7\\_tabs\\_rev.pdf](https://theharrispoll.com/wp-content/uploads/2020/04/Wave-2-7_tabs_rev.pdf), 4/11/20-4/13/20 and Ipsos, <https://www.ipsos.com/en/more-concerned-those-vulnerable-covid-19-their-own-health>

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## MOTHER'S DAY 2020: HOLIDAY AWARENESS UP, PERCEIVED IMPORTANCE UP, AND ACTUAL SPEND UP

Sources: The Harris Poll, [https://theharrispoll.com/wp-content/uploads/2020/04/Wave-2-7\\_tabs\\_rev.pdf](https://theharrispoll.com/wp-content/uploads/2020/04/Wave-2-7_tabs_rev.pdf), 4/11/20-4/13/20 and Ipsos, National Retail Federation, as reported in <https://www.ipsos.com/en/more-concerned-those-vulnerable-covid-19-their-own-health>, <https://www.bizjournals.com/bizwomen/news/latest-news/2020/05/consumers-spending-more-on-mom-this-mother-s-day.html?page=all>

# LONG-TERM SHIFTS IN MOTIVATIONS: DRIVE FOR SOCIAL CONNECTEDNESS

## INSIGHTS FOR MARKETERS



**DO** find creative ways of making products and experiences **shareable**—whether that’s product shopping experiences, usage experiences, or the ability to share out photos, tips, and stories.



**DO remain extra-sensitive** to social identities that are likely being primed right now—and use humor cautiously. Knowing that consumers’ sense of identity is shifting, and knowing that they are jumping into new products, the safest humor will be “universal” humor.



**DO** consider that **social networks** and paths of **word of mouth** may be working differently now than they usually do, and that people may rely more heavily on friends and family right now than they usually do. When looking to embed with new webs, consider using **referrals**.



**DO** consider opportunities to take share-ability one step further by making things **giftable**. It may be hard to buy your buddy a drink remotely, or to cover the tab for lunch, but are there virtual versions of generosity that can satisfy the same desire to connect?



**DO** consider that social identifications are in flux—and consider the relevance of **influencers, celebrities, and brand mascots** accordingly. Someone who was hugely popular last year may not be as compelling to audiences right now if audiences don’t feel they can identify.



**DO** think about baking **scheduled activities** into your marketing. Can people shop your site together Friday nights? Or login to your app and set a date? Consistent social connection relies on scheduling. And scheduling has the added benefit of driving up follow-through.

# LONG-TERM SHIFTS IN MOTIVATIONS: DRIVE FOR PERSONAL EFFICACY

## BEHAVIORAL OBSERVATIONS

In times of crisis, people don't just want to bond with others—they also want to help! And, contrary to intuition, one survey found that most people are far more worried about the health of others right now (64%) vs. their own health (38%), and a huge percentage (75%) are worried about the survival of small businesses.

Research in health psychology shows that in times of stress many people have a strong drive to get involved and be part of the solution. And doing so actually helps them to cope with stress.

In the current situation, though, this drive to help is largely being stymied: People are being told to stay at home and close the door behind them, and very few feel that they have a meaningful role to play in finding solutions.

Brands can play an impactful role by helping to solve this pain point. By creating opportunities for people to help, brands will be able to engage people in a timely and deeply involving way, and generate long-term goodwill.



Montana State University, <https://montanafreepress.org/2020/05/04/coronavirus-survey-highlights-strong-concern-for-health-of-others-and-economy/>

# LONG-TERM SHIFTS IN MOTIVATIONS: DRIVE FOR PERSONAL EFFICACY

## INSIGHTS FOR MARKETERS



**DO make it feel valuable.** People should feel confident that they are helping to meet a real need—like their time is valuable and they are spending it in an important away.



**DO make it authentic.** Brands should think about what their brand stands for, and make sure the helping task feels “right.” Don’t simply jump on a bigger bandwagon or do something generic. Instead, be creative and explore opportunities that are “on brand.”



**DO make it human-sized.** Many of the corporate actions that brands have taken since March have been laudable. But when it comes to “helping people help,” less is more: The kinds of helping actions people crave are neighborly, hands-on, and tangible (not large or impersonal).



**DO make it easy.** You want people to *feel good* about helping, not stressed! There is nothing worse than trying to help and failing. So make sure the task is accessible and do-able by most. And make the instructions foolproof.



**(BUT NOT TOO EASY!).** You want people to feel like they actually did something—a chunk of 20 minutes is ideal. When people invest time and energy into things, they feel more proud later.



**DO make it social.** Social can amplify the goodness in many ways: Helpers can feel even more helpful, audiences can feel connected to the helping, helpers themselves can connect with each other and with those they’ve helped, and the brand can get positive rub-off.

# LONG-TERM SHIFTS IN MOTIVATIONS: DRIVE FOR PURPOSE AND PASSIONS

## BEHAVIORAL OBSERVATIONS

Restaurateurs, sports therapists, salon owners, dancers, and many others who can't play their usual role in society are beginning to question their purpose right now—something that's especially true to the extent that their sense of who they are is strongly linked to their careers.

Meanwhile the scale and complexity of the pandemic are, according to research by Ipsos, creating a “wholesale restructuring” of people's political priorities and the way they see big issues like health, immigration, work, and economics.

While this may sound very gloomy, there is a very real silver lining as well: During coming weeks and months, people are likely to reflect on life, set new priorities, pick up new skills, develop new passions, and in some cases redefine their lives.

To stay relevant to people during this time, brands should listen closely to people, and help support and facilitate personal transitions and longer-term growth.



Sources: [https://cdn.thearf.org/ARF\\_Knowledgebase/ARF%20Member%20Only%20Events/2020.4.9\\_VirtualTownHall/ARF-Ipsos%20Coronavirus%20deck%20040820\\_revcliff3.pdf](https://cdn.thearf.org/ARF_Knowledgebase/ARF%20Member%20Only%20Events/2020.4.9_VirtualTownHall/ARF-Ipsos%20Coronavirus%20deck%20040820_revcliff3.pdf), The Harris Poll, <https://theharrispoll.com/wp-content/uploads/2020/05/The-Pulse-of-COVIDw11.pdf>

# LONG-TERM SHIFTS IN MOTIVATIONS: DRIVE FOR PURPOSE AND PASSIONS

## BEHAVIORAL OBSERVATIONS

# 58%

of 18-34 year-olds say they are **GRATEFUL FOR THE BREAK FROM WORK**

*Many are now re-thinking whether they buy into the American “productivity propaganda”*

# 60%

are spending more time on **SELF-CARE** and **MENTAL WELL-BEING**

*Many are placing greater priority on things like sleep, exercise, meditation, and healthy eating*

# 42%

say they are taking up a **NEW SKILL** or **HOBBY** as a result of the pandemic *Cooking, gardening, art/making, and technology/computer skills have all risen in interest since March*

Sources: The Harris Poll, <https://theharrispoll.com/wp-content/uploads/2020/05/The-Pulse-of-COVIDw11.pdf>, Business Wire, <https://www.businesswire.com/news/home/20200503005029/en/COVID-19-Increasing-Consumers%E2%80%99-Focus-%E2%80%9CEthical-Consumption%E2%80%9D-Accenture>, Ipsos, <https://www.ipsos.com/en/more-concerned-those-vulnerable-covid-19-their-own-health>, Keltos Perspectives, <https://www.keltonglobal.com/perspectives/>, Luth Research, <https://luthresearch.com/>

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**A WHOPPING 91% OF PEOPLE BELIEVE THE PANDEMIC WILL CREATE AT LEAST ONE POSITIVE CHANGE**

Sources: The Harris Poll, <https://theharrispoll.com/wp-content/uploads/2020/05/The-Pulse-of-COVIDw11.pdf>, Business Wire, <https://www.businesswire.com/news/home/20200503005029/en/COVID-19-Increasing-Consumers%E2%80%99-Focus-%E2%80%9CEthical-Consumption%E2%80%9D-Accenture,Ipsos>, <https://www.ipsos.com/en/more-concerned-those-vulnerable-covid-19-their-own-health>, Keltos Perspectives, <https://www.keltonglobal.com/perspectives/>, Luth Research, <https://luthresearch.com/>

# LONG-TERM SHIFTS IN MOTIVATIONS: DRIVE FOR PURPOSE AND PASSIONS

## INSIGHTS FOR MARKETERS



**DO** consider how your brand can **connect with new people**—people who may be picking up new pastimes, honing new skills, or developing new interests that are relevant to your brand. Your “core target” may be changing.



**DO help people set personal goals.** For many people, tackling short-term goals will be stress-relieving and will help combat a waning sense of personal efficacy. Goals also create a gamified experience, which can mark progress and keep people coming back.



**DO** consider marketing campaigns that lend themselves to **scheduling or calendaring** (e.g., regular podcasts or a phased set of goals over time). Many are feeling like it’s “Groundhog Day” every day. Brands that help people break things up over time will stand out in people’s memory over the long term.



**DO** consider the importance of **staying relevant with existing customers** who may be questioning the value of your brand and seeking out alternatives.



**DO set people up for success.** People aren’t looking for things that are hard right now. They aren’t looking to be frustrated or “prove themselves” once again. Provide FAQs, post tutorials, answer the phone when people call in for support. This will go a long way,



**DO** think about **reframing your brand as an experience** rather than a product. An experiential reframing can help expand the meaning and significance of the brand—something that’s especially important when people are looking for personal growth.

# LONGER-TERM THINKING: PREPARE FOR SHIFTS IN PEOPLE'S VALUES

It's not too early to consider how changing values might start to play into long-term marketing strategy.



# LONGER-TERM THINKING: SHIFTS IN PEOPLE'S VALUES

## BEHAVIORAL OBSERVATIONS

While psychologists long believed that people's core values don't shift much over time, a good deal of research shows that these values can in fact change substantially—and that sustained, highly emotional experiences almost always affect people's values in a significant way.

It's too early to know what values will shift the most in the wake of COVID-19, especially since there are multiple issues at play right now—concerns about personal health vs. public health vs. economic health vs. environmental health—and especially since these issues don't always point to the same expected shifts in values.

But in looking at research on other periods of mass anxiety in the US (the Great Recession, 9/11, Hurricane Katrina, Hurricane Sandy, and the Boston Marathon bombing), the research on wartime psychology, and of course the early shifts in people's recent behaviors and the new motivations that are emerging, there are a few early bets we can place.

But there are a few “forced trends” that are important to acknowledge first.

# LONGER-TERM THINKING: A SET OF FORCED TRENDS

## INSIGHTS FOR MARKETERS

First, there are 5 “forced trends” that we might hypothesize to be inevitable. These aren’t so much emerging values as they are new edges to the marketplace. These are things all brands need to be attuned to as backdrop—before thinking about adjustments to brand proposition or strategy.

- ▶ Many brands will be more closely scrutinized for value-for-the-money
- ▶ Health, hygiene, and personal safety will be seen as pure essentials
- ▶ Luxury will take on a new face (e.g., as space becomes more important than time)
- ▶ Fun and adventure will need to stay closer to home (or the imagination)
- ▶ Privacy and data ownership trends will accelerate, flipping one way or the other

# LONGER-TERM THINKING: 3 HIGHER-LEVEL CLUSTERS OF VALUES EMERGING

## INSIGHTS FOR MARKETERS

Beyond the forced trends, there are three highly intertwined macro-clusters of values that we see rising up when the mid-to-post-pandemic dust settles, supported by early survey data and behavioral patterns. These are important to plan for:

### #1

#### **FAMILY FIRST**

- Protecting the family
- Relationships and marriage
- Close friendships
- Parenting and children
- Respect for ritual
- Social/religious ingroup
- Responsibility and duty

### #2

#### **COMMUNITY CARE**

- Social responsibility
- Being helpful to others
- Forgiveness
- Gratitude
- All one ecosystem
- Environmental awareness
- In it together

### #3

#### **INDEPENDENT SPIRIT**

- Self-sufficiency
- Peace of mind
- Back to basics
- Self-reliance
- Inner strength
- Resourcefulness
- Self-care

Sources: Zeno Group, <https://www.provokemedia.com/research/article/latest-covid-19-research-explores-consumer-values-corporate-purpose-more>

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**HOW WILL SHIFTS IN VALUES BE DISTRIBUTED ACROSS GROUPS? AND HOW WILL THEY MANIFEST DIFFERENTLY?**

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**WHAT ABOUT VALUES LIKE DIVERSITY, STYLE, COMFORT, CONVENIENCE? WHAT ABOUT FANTASY/ESCAPE VS. REALITY?**

Sources: Zeno Group, <https://www.provokemedia.com/research/article/latest-covid-19-research-explores-consumer-values-corporate-purpose-more>

# SUMMARY CHEAT SHEET

THESE ARE VOLATILE TIMES: HELP PEOPLE FEEL GROUNDED



EVOLVE WITH THE MOMENT, AS THE LANDSCAPE SHIFTS

COMMUNICATE UNIVERSALLY, TO MULTIPLE MINDSETS

**SHORT-TERM STRATEGY:  
BE HYPER-PRESENT  
+ LEND A HAND**



**BE DIRECT,  
SAY YOU CARE,  
WALK THE TALK**

**MEDIUM-TERM STRATEGY:  
HELP PEOPLE TO  
"LOOP A HABIT"**



**PROTECT ESTABLISHED  
BRAND HABITS,  
BUILD OUT NEW ONES**

**LONG-TERM STRATEGY:  
LOOK FOR SHIFTS IN  
PEOPLE'S MOTIVATIONS**



**HELP PEOPLE FEEL  
CONNECTED, EMPOWERED,  
AND PURPOSE-DRIVEN**

**LONGER-TERM THINKING:  
PREPARE FOR SHIFTS  
IN PEOPLE'S VALUES**



**WATCH FOR SHIFTS IN  
VALUES AND CALIBRATE  
STRATEGY ACCORDINGLY**

*If you have any questions or would like to discuss any of the topics further, feel free to reach out to Hillary Haley, Ph.D., at [hhaley@rpa.com](mailto:hhaley@rpa.com).*

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