UNPRECEDENTEDY

How is Covid-19 changing the way we **connect**?



Who's on screen

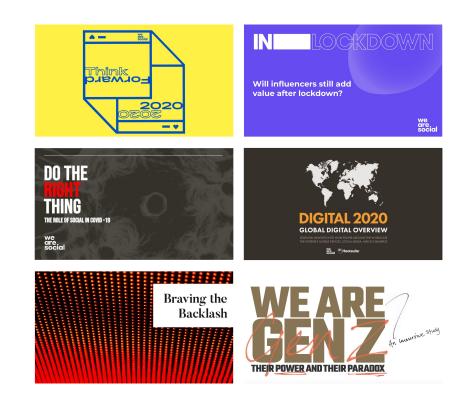


Mobbie Nazir Global Chief Strategy Officer **Lore Oxford** Global Head of Cultural Insights



Our thought leadership

Unprecedented? is the latest addition to our public facing research and thought leadership.





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Who we work with

Some of the most pioneering global brands in the world.

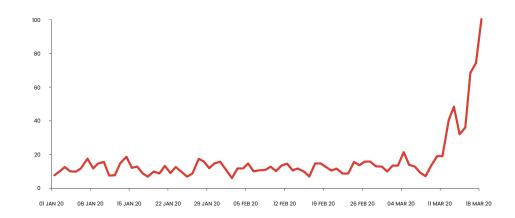




Introducing **Unprecedented?**

A series in which we explore how much Covid-19 has really changed the way we behave online – not just now, but in the long-term.







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How is Covid-19 changing the way we **connect**?

we are soci

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How is Covid-19 changing the way we **connect**?



How is Covid-19 changing the way we stay **entertained**?



Introducing Unprecedented?

A series in which we explore how much Covid-19 has really changed the way we behave online – not just now, but in the long-term.



How is Covid-19 changing the way we **connect**?



How is Covid-19 changing the way we stay **entertained**?



How is Covid-19 changing the way we get **informed**? 8



How is Covid-19 changing the way we **connect**?



Who contributed

We Are Social boasts a team of 800+ social experts spread across 15 offices globally, our global cultural knowledge is unmatched by most creative agencies.

Our **Social Spotting Network** is a core group of collaborators whose collective brain ensures we're keeping track of cultural shifts on a global scale.





we are social

Who contributed



Dr. Tunisha Singleton Media Psychologist & Brand Consultant



Sarah Whelan Global Consumer Marketing Manager at Dr. Martens

Harvey Cossell Group Head of Strategy, UK



Werner lucksch Strategy Director, Singapore



Bruno Tecci Head of Strategy, Italy









More time at home, less time with others







2 Less face time, more screen time





More time at home, less time with others

2 Less face time, more screen time



More instability, more collectivism

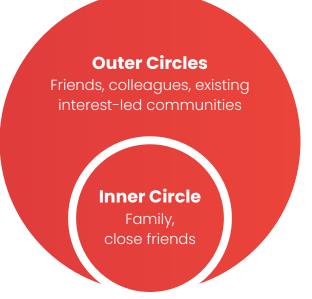




This isn't just about our **immediate loved ones,** either.



This isn't just about our **immediate loved ones,** either.





Wider Circles

Local neighbourhoods, Strangers with shared experiences

This isn't just about our **immediate loved ones,** either.

Outer Circles

Friends, colleagues, existing interest-led communities

Inner Circle

Family, close friends



we are social



In this environment, swathes of **new behaviours** have emerged.

we are socia



In this environment, swathes of **new behaviours** have emerged.

So how can we predict which ones will last?

The short answer is that **we can't.**

We're still operating in a unique space. Even as economies reopen, for many, the coming months are still defined by uncertainty and anxiety. Florida shatters records with over 10,000 new COVID-19 cases in single day



Leicester could be first place in England to face local lockdown

The Guardian

Coronavirus: Another spike forces Spain into second local lockdown in 24 hours



21



But we can interrogate some of the most interesting behaviours to make an **educated guess**...



EXISTING BEHAVIOUR

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EXISTING BEHAVIOUR

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EXISTING BEHAVIOUR

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IMMUNITY-BOOSTING FOODS

People were buying health foods prior to the crisis. But in the wake of Covid-19, a desire for foods that boost immunity in particular has developed. This is an **<u>adaptation</u>** in line with the anxieties of the pandemic.

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AMPLIFICATIONS

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NEW MOTIVATION

RESTAURANT MEAL KITS

During the crisis, people have been ordering restaurant meal kits to home, but have gained such a taste for it that many restaurants plan on continuing this service. This is a **<u>deviation</u>** – a new behaviour that has led to a new need.

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AMPLIFICATIONS

HOME DELIVERED GROCERIES Previous to the crisis, buying

The most interesting developments will be those that speak to new motivations that have emerged during the crisis

DIGITAL SUPPER CLUBS substitute the existing desire to eat out in social spaces.

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DEVIATIONS

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So let's explore the key **behaviours defining the ways we connect** during Covid-19...

Public Spaces

People have been replicating the feeling of public spaces with strangers through social





01 Public Spaces

People have been replicating the feeling of public spaces with strangers through social

Before Covid-19

Third spaces were an important part of how we socialised, defined by a lack of ownership of space that maximises shared comfort.

During Covid-19

With no access to these spaces, people are growing more comfortable spending time with strangers in digital spaces.



Where we've seen it?









Club Quarantine is an LGBTQ+ nightclub hosted on Zoom

Canada / Global

Rebel Book Club is a book club that's been hosted online during lockdown

UK / Global

Quan Min Party is an online karaoke bar for people to sing together

China

Chipotle has been hosting virtual lunches with influencers on Zoom

US



we are social At Dr. Martens, our social communities have become key spaces for people to meet, engage and connect. We've seen a significant increase in conversations happening on our channels, not just between us and the consumer, but consumers connecting with each other. It's been interesting to see like minded individuals start relationships and internet friendships in the comments of our Instagram posts

Sarah Whelan Global Consumer Marketing Manager at Dr. Martens





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AMPLIFICATIONS

This is replacement behaviour. They're looking to replicate something that they can't currently do, replacing IRL, with URL. Is this replacement as good? Probably not Harvey Cossell, Group Head of Strategy, UK **EXISTING** 铅 PUBLIC SPACES SUBSTITUTES DEVIATIONS **NEW BEHAVIOUR** we are socia

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EXISTING MOTIVATION	spaces now, but post-Covid, they -> NEW MOTIVATION
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	public spaces, but to complement
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What it means for brands

In Q3 and Q4...

For any products launching towards the end of this year, there's an opportunity to make tactical use of this. In this sense, it will continue to be useful until there's a vaccine.

In the new normal...

For brands whose products and offline spaces already facilitate a social element, there's an opportunity to recreate these spaces online.





Intergenerational Media

People are **connecting with their families** by merging their media habits





02

Intergenerational Media

People are **connecting** with their families

by merging their media habits

Before Covid-19

Media habits between generations were highly differentiated, meaning it was often a barrier to family bonding, rather than an enabler.

During Covid-19

Families that have been locked down together, are spending more time in each other's spaces and media habits have overlapped. Those that live separately have been communicating via more digital mediums.

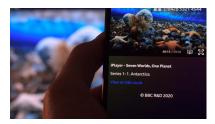


Where we've seen it?









Families are coming together around the 'family hearth' of TV

Europe

Families are making TikToks together as an exercise in bonding

Global

Parents and kids are baking recipes they find on Instagram together

Dubai

The BBC launched a tool for shared viewing during lockdowns

UK



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AMPLIFICATIONS

There's not a lot of digital literacy among the oldest generations. Will we see more great- greatgrandmothers dancing to Bruno Mars when this is over? I'm not sure Dr. Tunisha Singleton, Media Psychologist & Brand Consultant **EXISTING N** ¢ INTERGENERATIONAL MEDIA SUBSTITUTES DEVIATIONS **NEW BEHAVIOUR** we are. socia

ADAPTATIONS

What it means for brands

In Q3 and Q4...

Older audiences have gotten a crash course in digital comms and memes, which will continue to be put to use as we move in and out of lockdown.

There's an opportunity for all kinds of brands to lean into this – whether Netflix encourages family viewing or Barilla encourages cooking together – especially right now.

In the new normal...

Brands can continue to teach seniors and older generations digital citizenship.

There's an opportunity for brands to use intergenerational communication plans to draw in older audiences, without compromising on their youthfulness.



03 Local Spirit

People are more **invested in their immediate offline locales** and communities





03 Local Spirit

People are more **invested in their immediate offline locales** and communities

Before Covid-19

Recent years have seen a rise in conscious consumption – a growing desire to redirect spending away from big business, and towards smaller and more local businesses.

During Covid-19

During Covid-19, small businesses have been at particular risk. Unable to travel, and united with neighbours and local communities through a shared enemy, our desire to support these businesses and communities on a local level has been heightened.



Where we've seen it?









Bars and restaurants have launched GoFundMe pages, tapping into local communities to survive the pandemic

Global

British communities have started WhatsApp groups to protect the vulnerable in their neighbourhoods

UK

German football club Borussia Dortmund created a platform to support local businesses you'd usually visit on matchday Diageo has launched a \$100 million recovery fund to help independent pubs and bars, demonstrating investment in local communities

Germany

Global



With people being more engaged with their immediate locales, they're also noticing the issues. Take the Black experience in America right now. Many are seeing how Black communities have been mistreated. As a result, people in these local communities from all demographics and cultures are supporting Black businesses and shopping from local establishments that share their values

Dr. Tunisha Singleton, Media Psychologist & Brand Consultant





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ADAPTATIONS

What this really highlights is conscious consumerism. That's increased post-Covid because the meaning behind community has been heightened. We're viewing ourselves as emotional stakeholders, as being a part of something greater than ourselves

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What it means for brands

In Q3 and Q4...

For big brands that are perceived to be disconnected from local communities can show people that they're ingrained by giving back, especially during a time of such heightened uncertainty.

During this time, brands should also tap into local figures and businesses to make content as locally relevant as possible.

In the new normal...

With Facebook Shops rolling out globally, the role social could play in increasing the footprint of small and medium businesses may grow.

In the long-term, this will play out very differently in different markets and locales. While cities with high population densities may have less connection to local business, for example, this will have particular impact on suburban and rural consumers.



04

Notification Fatigue

People are **feeling overwhelmed** by always-on digital communications





U**H** Notification Fatigue

People are **feeling overwhelmed** by always-on digital communications

Before Covid-19

Amid an uptick in mental health awareness and self-care, social media and tech have been painted as the enemy. People have been seeking ways to form healthier relationships with their screens.

During Covid-19

At the height of the first wave, our screens were no longer optional, becoming integral to our work and relationships. Combined with an uptick in global bad news, we've been forced to find new ways to protect our emotional wellbeing.



Where we've seen it?









People are unable to stop scrolling through bad news – a phenomenon that's referred to as doomscrolling People are feeling fatigued by video calls – whether work meets on Zoom or hangs on Houseparty

Global

People are muting WhatsApp notifications to protect their mental health

Global

Thrive Away is an app from tech consultancy Thrive Global, which lets users block all notifications

Global



Global

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	engaged with casually, but now we're being forced to. So we're building up emotional resilience to protect ourselves				 	 	· · · · ·		 	· · · ·
	Dr. Tunisha Singleton, Media Psychologist & Brand Consultant	· · · · · · ·	· · · · · ·		· · · · ·	· · · · ·	· · · · ·	· · · · ·	· · · · ·	· · · · · ·
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What it means for brands

In Q3 and Q4...

People aren't necessarily going to want to leave their screens for good, but there are ways that brands can help them feel more positive about their screen time.

Whether encouraging new routines around time away from your phone, or providing content that encourages you do something non-screen related, it's about encouraging balance and moderation.

In the new normal...

We could see people pruning their feeds more – muting, blocking and unfollowing. In this landscape, brands will need to maximise the value of their content to maintain engagement.

There could also be more opportunities for brands to help people disconnect from their phones and immerse themselves in the world around them without it feeling paternalistic.



05 Mobilised

Fandoms

Fan communities are **mobilising to make the changes** they want to see in the world





05 Mobilised Fandoms

Fan communities are **mobilising to make the changes** they want to see in the world

Before Covid-19

Fandom have wielded a growing amount of cultural clout online for years, with fans coalescing into tight-knit communities online and using their shared voice to make themselves heard.

During Covid-19

Galvanised by a landscape ridden with a heightened sense of anxiety and political unrest, fan communities are using their power to effect real social and political change offline.



Where we've seen it?









Chiara Ferrangi's very global following clubbed together to raise €3.3 million for Italian healthcare services

Italy / Global

Harry Potter fans mobilised to speak out against JK Rowling in light of her controversial tweets around trans rights

K-Pop Fans have been mobilising against racism online through sabotaging Trump rallies and racist hashtags The Washington Redskins are changing their name and logo off the back of community backlash during BLM

Global

China / US / Global

US



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What it means for brands

In Q3 and Q4...

Now is the time to lean into existing fan communities. If you already have a fan community around your brand, build them up and support them.

If you don't, feed other fan communities what they need to coalesce, give them something to rally around.

In the new normal...

Brands in these communities will need to play a role and stand with their community. They won't be able to ignore the political values of their fans.

Brands could also have the opportunity to tap into their own communities, customers and fans to genuinely bring about change in line with their values. This could change the face of brand purpose forever.



People expect brands to have an opinion – you have to have a point of view and you can not sit on the fence. It will come from the brand, but it won't just be about what the brand wants to say anymore. It will have to be a collaborative strategy

Sarah Whelan Global Consumer Marketing Manager at Dr. Martens





we are social

To recap



Public Spaces People have been replicating the feeling of public spaces with strangers through social



Intergenerational Media People are connecting with their families by merging their media habits



Local Spirit People are more invested in their immediate offline locales and communities





Notification Fatigue People are feeling overwhelmed

by always-on digital communications



Mobilised Fandoms

Fan communities are mobilising to make the changes they want to see in the world



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We're seeing a shift from passive connection to conscious connection



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These behaviours point to more active forms of digital communication...

Local Spirit sees people use digital communication to engage more actively in offline communities



A funny thing lockdown. Lived in the same road for 10 years & only knew my neighbours either side. After a socially distancing VE Day party got chatting to someone further down the street & we've now set up a Neighbourhood Watch scheme. All about instilling a sense of community.

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 Image: State of the s

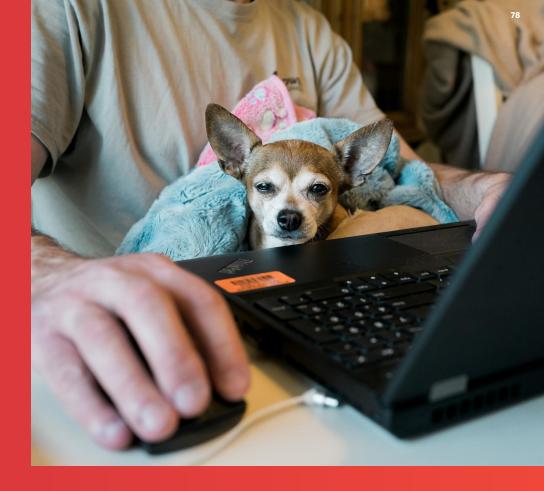
Intergenerational Media sees people use digital media to engage more actively with their families



Mobilised Fandoms sees people use digital media to engage with people who don't share their political values

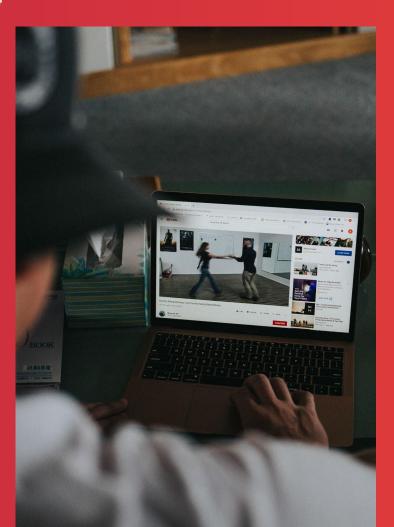


It's a departure from the more passive forms of connection our social feeds have long enabled



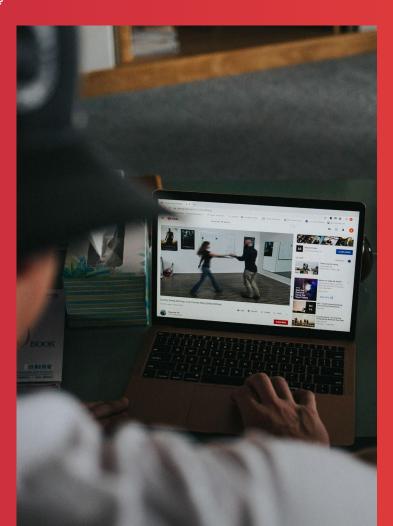


we are social



We've been forced to use digital to connect in every aspect of our lives

we are



We've been forced to use digital to connect in every aspect of our lives

In doing so, we've realised that when we lean in, **digital communications can make a tangible impact** on our offline relationships and experiences

we are social

And already, we're seeing this shift play out in new and exciting ways...

#ShareTheMicNow saw

celebrities redistribute their disproportionate influence to promote anti-racist ideas



#FreeBritney has seen meme admins shift from posting '90s throwbacks to engaging with the reality of her experience



#LetsTalkAboutIt is a TikTok hashtag providing a space for people to provoke healthy debate around what matters to them



