UNPRECEDENTED?

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

Who's on screen
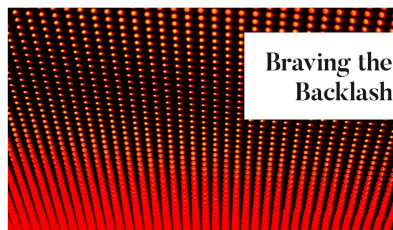
Lore Oxford
Global Head of
Cultural Insights

Mobbie Nazir
Global Chief
Strategy Officer

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Our thought leadership

Unprecedented? is the latest addition to our public facing research and thought leadership.
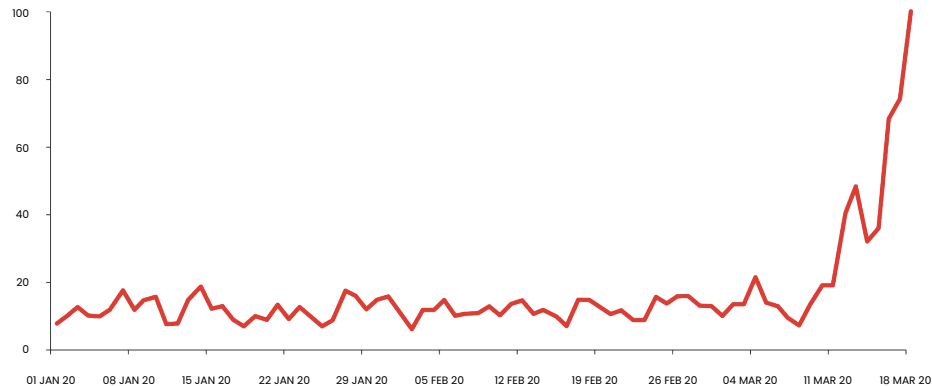
Who we work with

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.

This year, there's been unprecedented use of the word 'unprecedented'

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.

01

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

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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.

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

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

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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.

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

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

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

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

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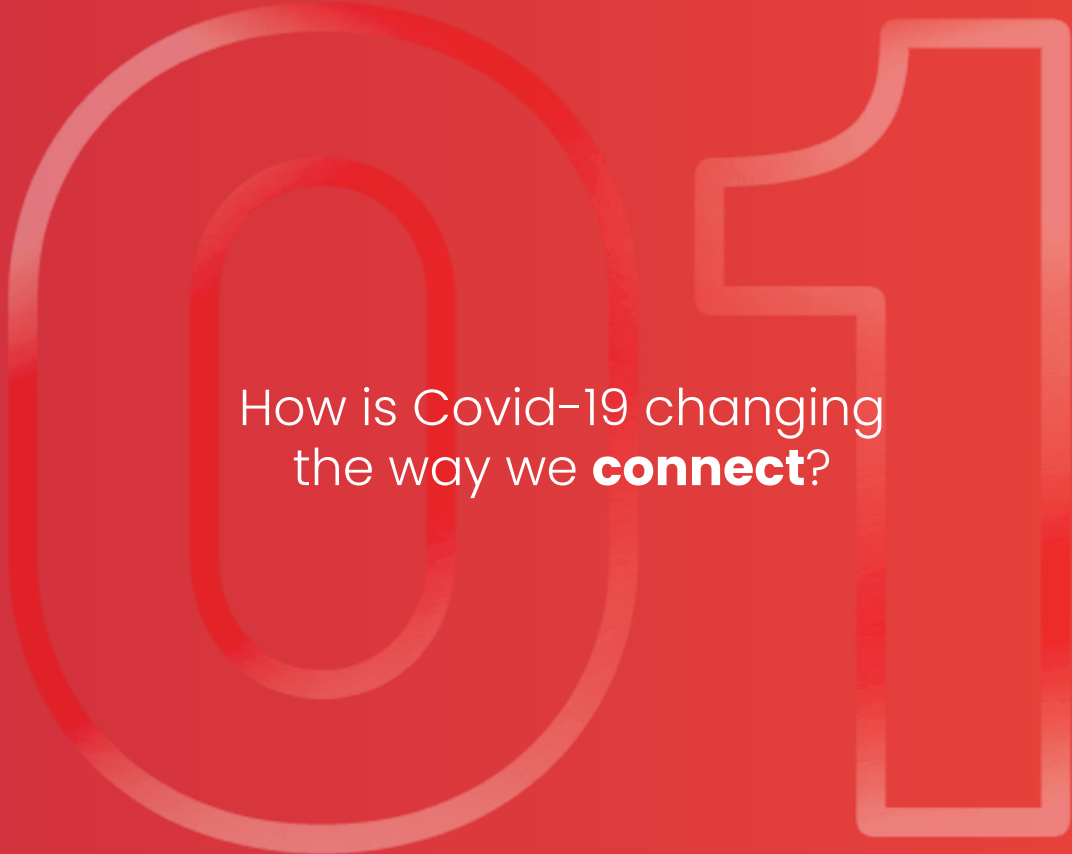
Who contributed

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.

TORONTO

NEW YORK

LONDON

PARIS

MADRID

BERLIN

MUNICH

MILAN

DUBAI

BEIJING

SHANGHAI

HONG KONG

TOKYO

SINGAPORE

SYDNEY

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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 Iucksch
Strategy Director, Singapore

Bruno Tecci
Head of Strategy, Italy

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Covid-19 has led to some **major disruptions** in the way we communicate…

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Covid-19 has led to some **major disruptions** in the way we communicate...

01 **More time at home, less time with others**

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Covid-19 has led to some **major disruptions** in the way we communicate...

01 More time at home, less time with others

02 Less face time, more screen time

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Covid-19 has led to some **major disruptions** in the way we communicate...

01 More time at home, less time with others

02 Less face time, more screen time

03 More instability, more collectivism

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

Inner Circle
Family,
close friends
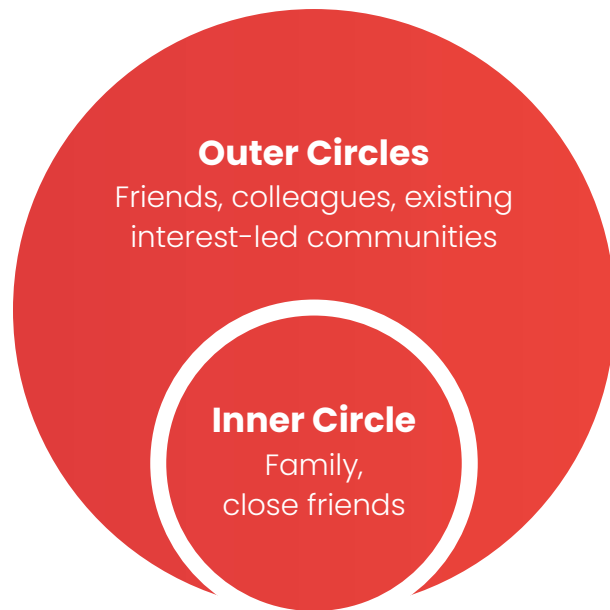
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This isn't just about our **immediate loved ones**, either.

Outer Circles
Friends, colleagues, existing interest-led communities

Inner Circle
Family,
close friends

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

Wider Circles
Local neighbourhoods,
Strangers with shared experiences

Outer Circles
Friends, colleagues, existing
interest-led communities

Inner Circle
Family,
close friends

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

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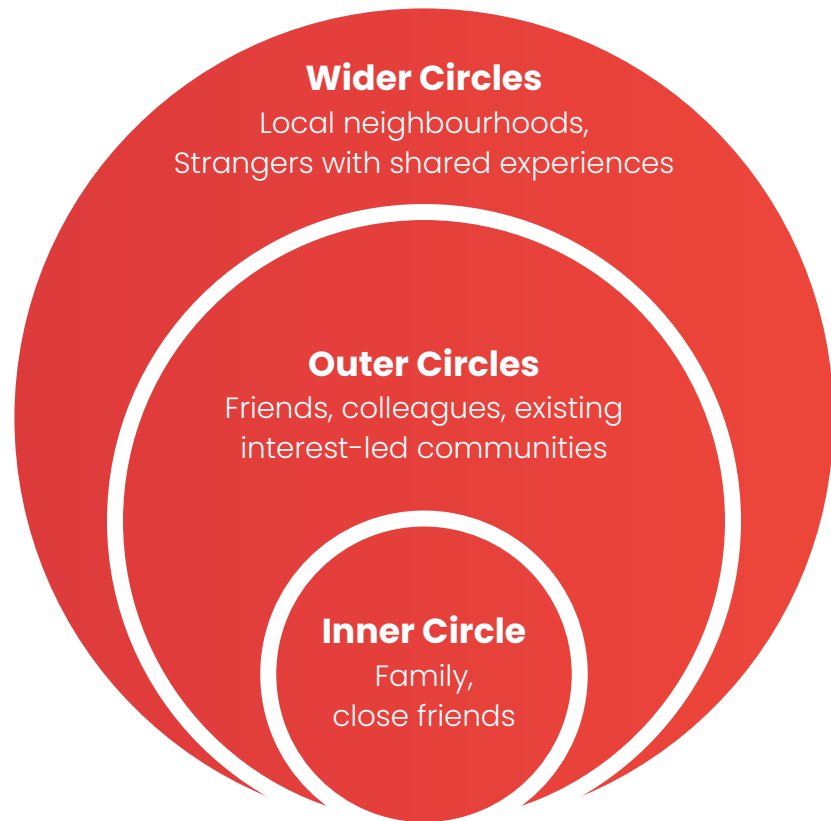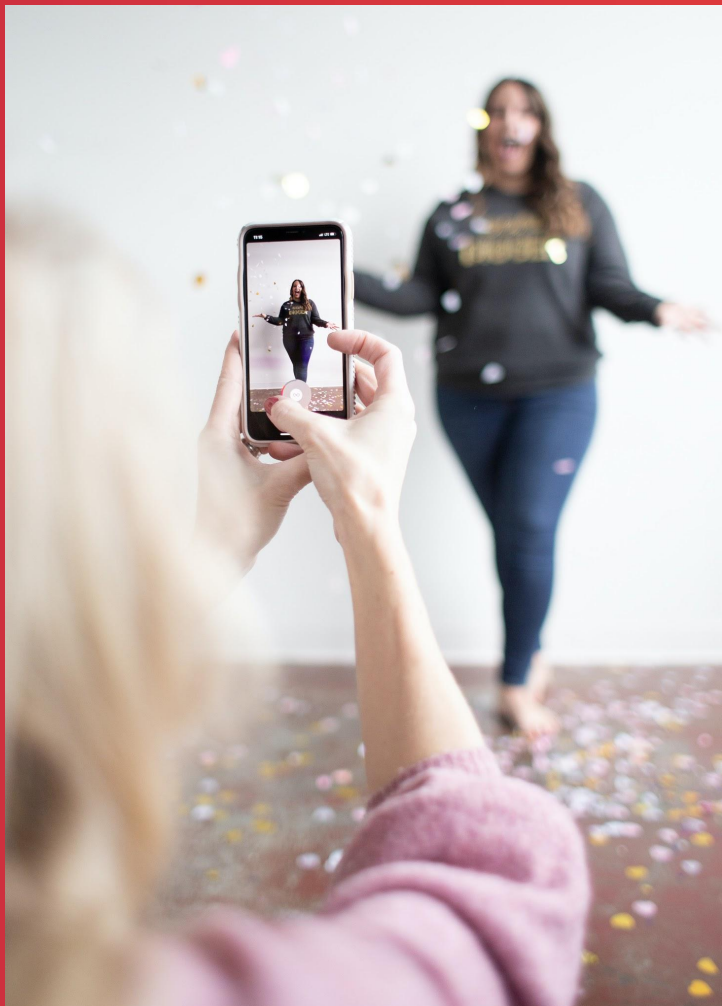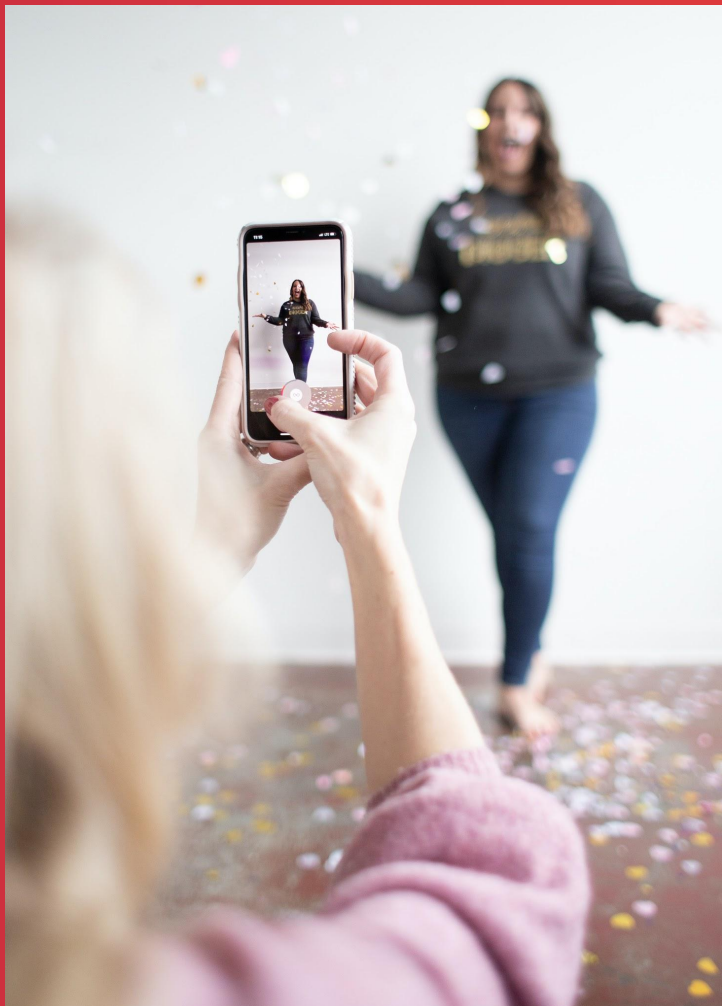
In this environment, swathes of **new behaviours** have emerged.

So how can we predict which ones **will last**?

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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

REUTERS

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

sky news

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

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EXISTING BEHAVIOUR

NEW BEHAVIOUR

Firstly, is it truly new, or is it part of an existing behaviour?

EXISTING BEHAVIOUR

EXISTING MOTIVATION   **NEW MOTIVATION**

Secondly, does it speak to
an existing motivation that
couldn't be served during
the crisis, or speak to a new
one that's developed
because of the crisis?

NEW BEHAVIOUR

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AMPLIFICATIONS

EXISTING BEHAVIOUR

Amplifications are familiar responses to existing drivers and motivations that have been temporarily exacerbated during the crisis.

EXISTING MOTIVATION

NEW MOTIVATION

NEW BEHAVIOUR

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AMPLIFICATIONS

EXISTING BEHAVIOUR

EXISTING MOTIVATION

NEW MOTIVATION

Substitutes are new responses to the crisis that serve existing motivations and desires in the short-term.

SUBSTITUTES

NEW BEHAVIOUR

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EXISTING BEHAVIOUR

AMPLIFICATIONS

ADAPTATIONS

Adaptations are existing behaviours that serve new motivations in the wake of the crisis.

EXISTING MOTIVATION

NEW MOTIVATION

SUBSTITUTES

NEW BEHAVIOUR

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EXISTING BEHAVIOUR

AMPLIFICATIONS

ADAPTATIONS

EXISTING MOTIVATION ←————————————→ **NEW MOTIVATION**

Deviations are new responses to new motivations that could persist beyond the crisis.

SUBSTITUTES

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EXISTING BEHAVIOUR

AMPLIFICATIONS

ADAPTATIONS

EXISTING MOTIVATION

Let's use some widely reported food trends during the crisis as an example

NEW MOTIVATION

SUBSTITUTES

DEVIATIONS

NEW BEHAVIOUR

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EXISTING BEHAVIOUR

AMPLIFICATIONS

ADAPTATIONS

HOME DELIVERED GROCERIES
Previous to the crisis, buying groceries online was an existing behaviour, driven by a need for convenience. Due to lockdown, the desire for home delivered groceries was **amplified**.

EXISTING MOTIVATION

NEW MOTIVATION

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EXISTING BEHAVIOUR

HOME DELIVERED GROCERIES
Previous to the crisis, buying groceries online was an existing behaviour, driven by a need for convenience. Due to lockdown, the desire for home delivered groceries was **amplified**.

EXISTING MOTIVATION

NEW MOTIVATION

DIGITAL SUPPER CLUBS
During the crisis, people were trialling virtual food events – from supper clubs to wine tastings – a new behaviour to **substitute** the existing desire to eat out in social spaces.

NEW BEHAVIOUR

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EXISTING BEHAVIOUR

AMPLIFICATIONS

ADAPTATIONS

HOME DELIVERED GROCERIES
Previous to the crisis, buying groceries online was an existing behaviour, driven by a need for convenience. Due to lockdown, the desire for home delivered groceries was **amplified**.

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 **adaptation** in line with the anxieties of the pandemic.

EXISTING MOTIVATION

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DIGITAL SUPPER CLUBS
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NEW MOTIVATION

DIGITAL SUPPER CLUBS
During the crisis, people were trialling virtual food events – from supper clubs to wine tastings – a new behaviour to **substitute** the existing desire to eat out in social spaces.

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 **deviation** – a new behaviour that has led to a new need.

SUBSTITUTES

NEW BEHAVIOUR

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EXISTING BEHAVIOUR

HOME DELIVERED GROCERIES
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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 **adaptation** in line with the anxieties of the pandemic.

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

EXISTING MOTIVATION
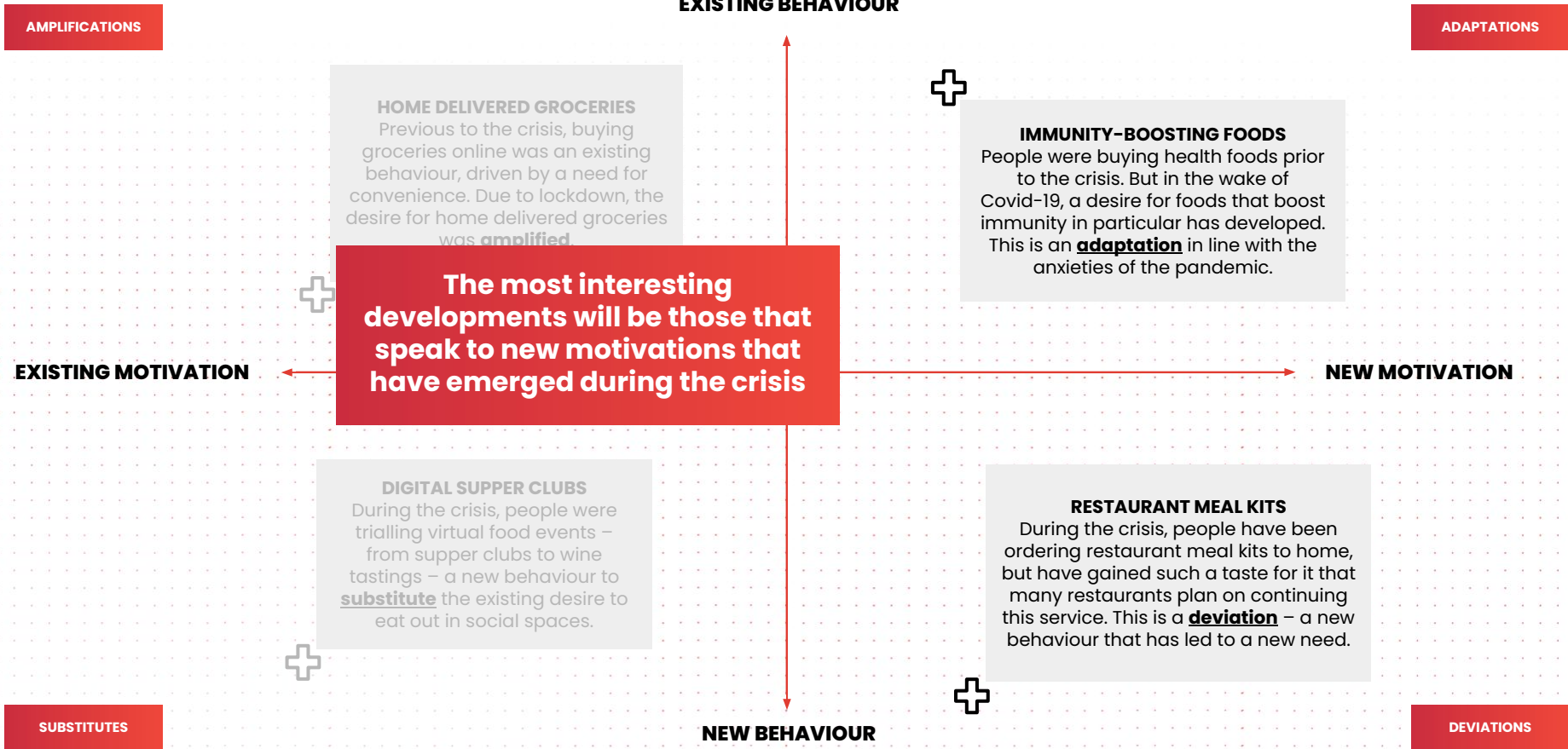
NEW MOTIVATION

DIGITAL SUPPER CLUBS
During the crisis, people were trialling virtual food events – from supper clubs to wine tastings – a new behaviour to **substitute** the existing desire to eat out in social spaces.

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NEW BEHAVIOUR

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

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01

Public Spaces

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

we are 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.
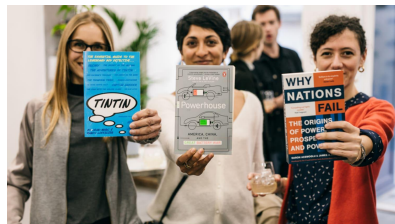
During Covid-19

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

we are social

Where we've seen it?

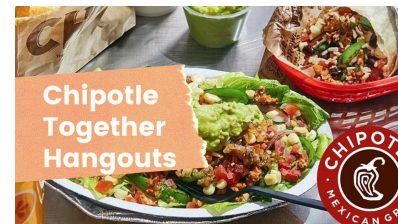**Club Quarantine is an LGBTQ+ nightclub hosted on Zoom**

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

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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EXISTING BEHAVIOUR

AMPLIFICATIONS

ADAPTATIONS

EXISTING MOTIVATION

NEW MOTIVATION

PUBLIC SPACES

SUBSTITUTES

DEVIATIONS

NEW BEHAVIOUR

EXISTING BEHAVIOUR

AMPLIFICATIONS

ADAPTATIONS

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 MOTIVATION

NEW MOTIVATION

PUBLIC SPACES

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EXISTING BEHAVIOUR

AMPLIFICATIONS

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NEW MOTIVATION

These tools are replacing public spaces now, but post-Covid, they could be remodelled, not to replace public spaces, but to complement them. After this is over, we'll be more open to recognising that technology can be an enabler of these experiences when we need it to be

Dr. Tunisha Singleton, Media Psychologist & Brand Consultant

PUBLIC SPACES

SUBSTITUTES

DEVIATIONS

NEW BEHAVIOUR

we are social

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.

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02

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?

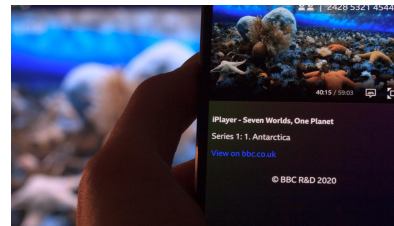**Families are coming together around the 'family hearth' of TV**

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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EXISTING BEHAVIOUR

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NEW MOTIVATION

INTERGENERATIONAL MEDIA

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EXISTING BEHAVIOUR

AMPLIFICATIONS

ADAPTATIONS

Once parents go back to work and life returns to some normality, we may see this behaviour reduce, but common ground has been built here. It may reduce in terms of frequency, but I don't think it will disappear, either

Bruno Tecci, Head of Strategy, Italy

EXISTING MOTIVATION

NEW MOTIVATION

INTERGENERATIONAL MEDIA

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EXISTING BEHAVIOUR

AMPLIFICATIONS

ADAPTATIONS

There's not a lot of digital literacy among the oldest generations. Will we see more great- great-grandmothers dancing to Bruno Mars when this is over? I'm not sure

Dr. Tunisha Singleton, Media Psychologist & Brand Consultant

EXISTING MOTIVATION

NEW MOTIVATION

INTERGENERATIONAL MEDIA

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NEW BEHAVIOUR

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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.

we are social

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

Germany

Diageo has launched a $100 million recovery fund to help independent pubs and bars, demonstrating investment in local communities

Global

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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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EXISTING BEHAVIOUR

AMPLIFICATIONS

ADAPTATIONS

LOCAL SPIRIT

EXISTING MOTIVATION

NEW MOTIVATION

NEW BEHAVIOUR
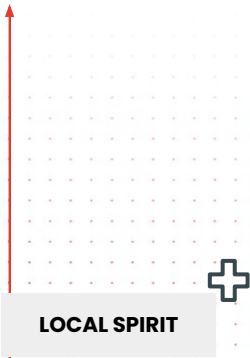
SUBSTITUTES

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EXISTING BEHAVIOUR

AMPLIFICATIONS

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

Dr. Tunisha Singleton, Media Psychologist & Brand Consultant

LOCAL SPIRIT

EXISTING MOTIVATION

NEW MOTIVATION

SUBSTITUTES

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NEW BEHAVIOUR

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EXISTING BEHAVIOUR

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LOCAL SPIRIT

EXISTING MOTIVATION

NEW MOTIVATION

Let's not forget that e-commerce is going through the roof. People are more connected with their communities, yes. But that won't necessarily translate into investment in the community in the long-term

Werner Iucksch, Strategy Director, Singapore

SUBSTITUTES

DEVIATIONS

NEW BEHAVIOUR

we are social

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

04

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.
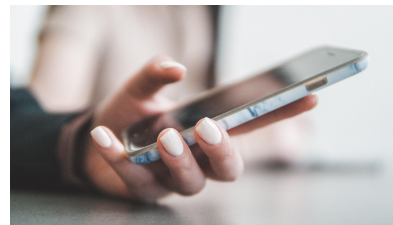
we are social

Where we've seen it?

People are unable to stop scrolling through bad news – a phenomenon that's referred to as doomscrolling
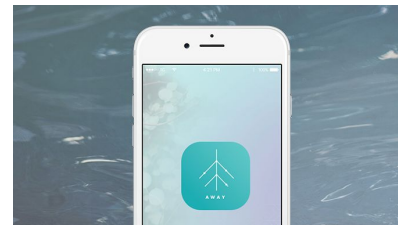
Global

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

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AMPLIFICATIONS

ADAPTATIONS

EXISTING BEHAVIOUR

NOTIFICATION FATIGUE

EXISTING MOTIVATION

NEW MOTIVATION

NEW BEHAVIOUR

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NOTIFICATION FATIGUE

EXISTING MOTIVATION

NEW MOTIVATION

There are so many emotions happening through our screens – you're in a work meeting, then you're reading about police brutality, then you're at a virtual happy hour. It makes some of us feel busier than they were before. It used to be something you 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

SUBSTITUTES

NEW BEHAVIOUR

DEVIATIONS

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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.

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05

Mobilised Fandoms

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

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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.

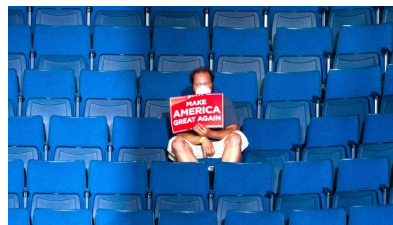we are social

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

Global

K-Pop Fans have been mobilising against racism online through sabotaging Trump rallies and racist hashtags

China / US / Global

The Washington Redskins are changing their name and logo off the back of community backlash during BLM

US

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EXISTING BEHAVIOUR

AMPLIFICATIONS

ADAPTATIONS

EXISTING MOTIVATION

MOBILISED FANDOMS

NEW MOTIVATION

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NEW BEHAVIOUR

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AMPLIFICATIONS

ADAPTATIONS

EXISTING BEHAVIOUR

Fans have been recognising that they're in the driver's' seat when it comes to culture and the marketing around their interests. So it brands can't figure out how to connect with fans or give them what they want, fans have realised that they can just show them

Dr. Tunisha Singleton, Media Psychologist & Brand Consultant

EXISTING MOTIVATION   MOBILISED FANDOMS   **NEW MOTIVATION**

NEW BEHAVIOUR

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EXISTING BEHAVIOUR

AMPLIFICATIONS

ADAPTATIONS

EXISTING MOTIVATION

Covid-19 is a disaster, of course, but it's also raised an opportunity to be better. A lot of young people are coming together to say – I don't want to miss an opportunity for the world to be better. They're driven to add positivity to the world

Bruno Tecci, Head of Strategy, Italy

MOBILISED FANDOMS

NEW MOTIVATION

SUBSTITUTES

NEW BEHAVIOUR

DEVIATIONS

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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.

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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

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To recap

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

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

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

04 Notification Fatigue
People are feeling overwhelmed by always-on digital communications
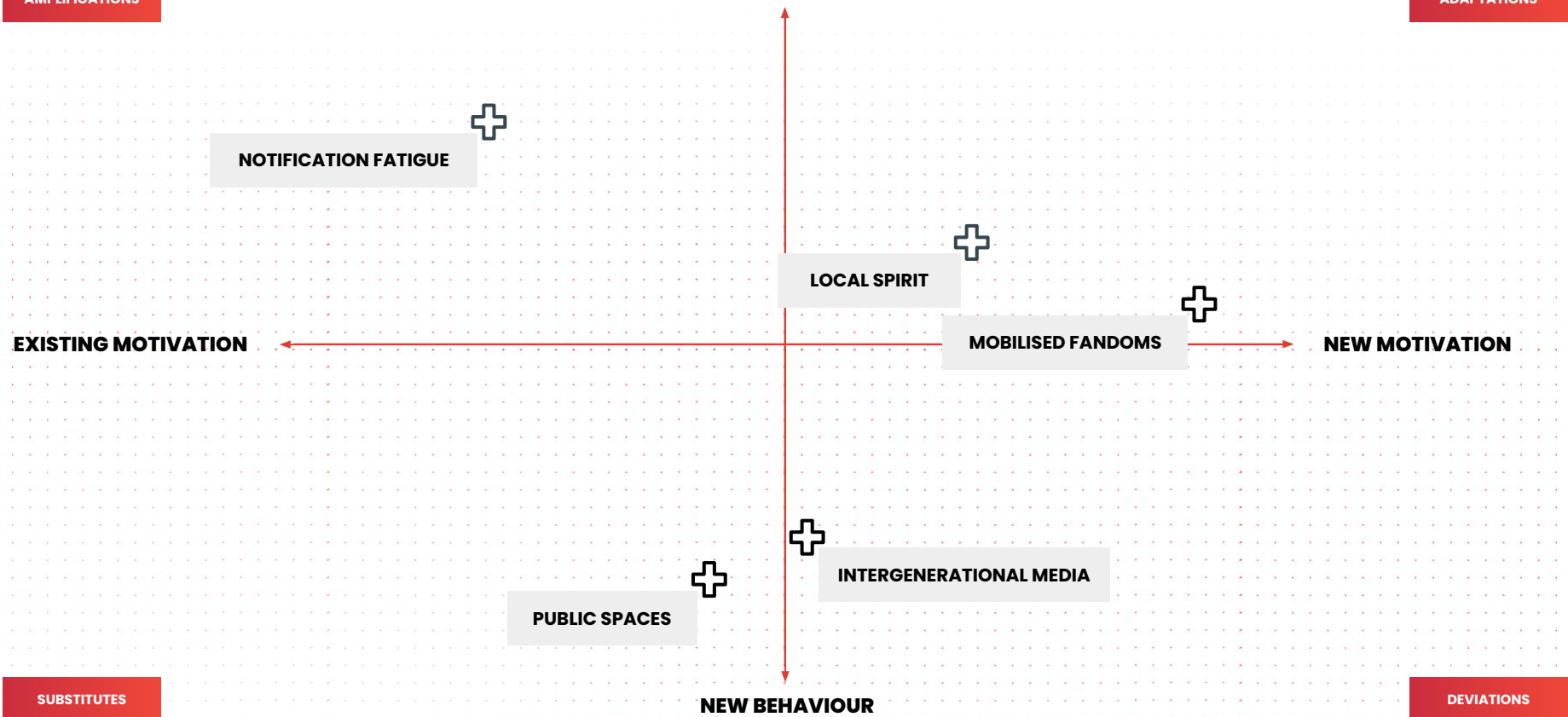
05 Mobilised Fandoms
Fan communities are mobilising to make the changes they want to see in the world

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EXISTING BEHAVIOUR

NOTIFICATION FATIGUE

LOCAL SPIRIT

EXISTING MOTIVATION   **NEW MOTIVATION**

MOBILISED FANDOMS

INTERGENERATIONAL MEDIA

PUBLIC SPACES

NEW BEHAVIOUR

we
are
social

EXISTING BEHAVIOUR

AMPLIFICATIONS

ADAPTATIONS

NOTIFICATION FATIGUE

LOCAL SPIRIT

EXISTING MOTIV

So what unites the three newest and most promising developments we're seeing in communication behaviours that have emerged during this crisis?

MOBILISED FANDOMS

NEW MOTIVATION

INTERGENERATIONAL MEDIA

PUBLIC SPACES

SUBSTITUTES

DEVIATIONS

NEW BEHAVIOUR

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

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

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

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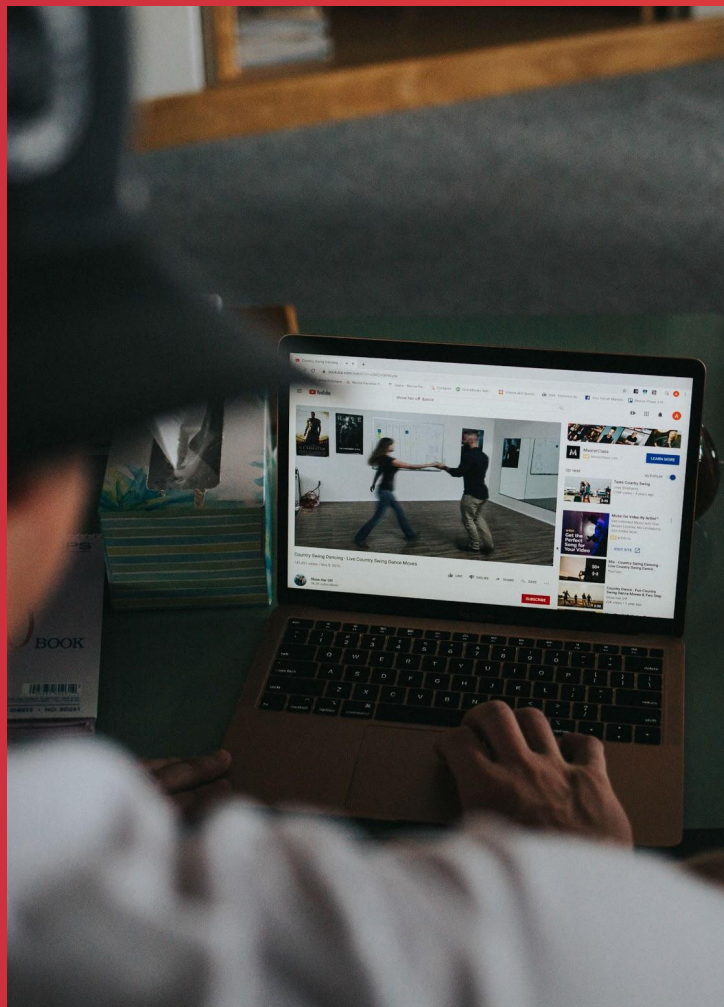

Mobilised Fandoms sees people use digital media to engage with people who don't share their political values
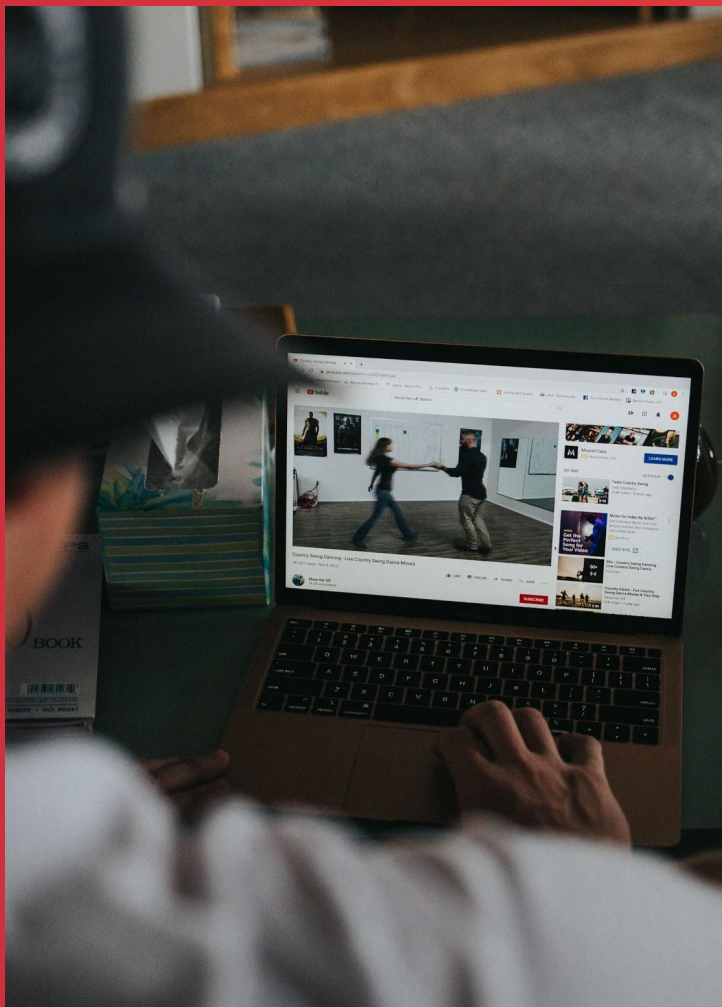

we are social

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
social

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
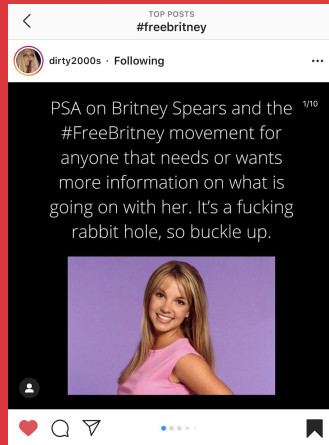
we
are
social

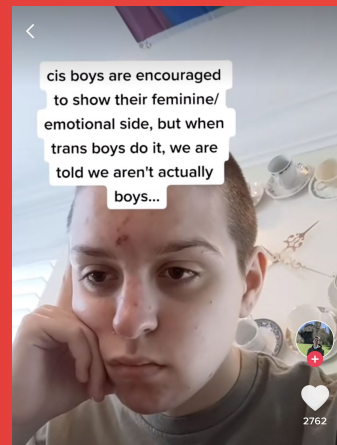# And already, we're seeing this shift play out in new and exciting ways…

#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

KATIECOURIC
Posts
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#SHARETHEMICNOW

6/10

TOP POSTS
#freebritney

dirty2000s · Following

PSA on Britney Spears and the #FreeBritney movement for anyone that needs or wants more information on what is going on with her. It's a fucking rabbit hole, so buckle up.

1/10

cis boys are encouraged to show their feminine/ emotional side, but when trans boys do it, we are told we aren't actually boys…

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we
are
social

we are.
social