PREDICTING THE FUTURE:
How COVID-19 Will Shift Consumer Behavior
While there has been a lot of valuable information shared for marketing during the COVID-19 crisis, our team started to wonder: How will this affect consumers in the long term? What lasting behavioral and attitudinal changes can we anticipate? And how should brands be thinking about connecting with the post-COVID consumer? By watching how consumers are changing in real time, we’ve identified seven key trends that will reflect the lasting impact of the COVID-19 crisis.

- Return of Expertise
- Ambient Wellness
- Human Era 2.0
- Preparedness Is the New Prada
- From Me to We
- Accelerated Digitization
- Corporate Clarity
The Return of Expertise

Turns out, everybody isn’t an expert.
Expertise Exposed

Erroneous decisions and statements by leaders without proficiency expose that information and expertise are different.

THE RETURN OF Expertise

Serious uncertainty about the state of the world and the escalation of the COVID-19 global crisis puts experts front and center. What does the return of experts look like long term?

30%

Increase in Organic Traffic to CDC.gov since November 2019*

FADING

The Information Equalizer

Abundant access democratizes information. Self-informed is the new self-empowered, and the credentialed expert is exposed to challenges in all fields.

FOREMOST

Expertise Exposed

FUTURE

Trust in Balance

While people will always trust information from people they know personally, information from unverified “viral” sources will be sidelined for information from credible news sources and known institutions.

Source: SEMRush.com
SOCIAL ROLES AND SPECIALIZATION ARE AS ANCIENT AS CIVILIZATION ITSELF

Experts Emerged With Civilization

About 12,000 years ago, human communities changed with the practice of farming. Established agricultural systems had massive ramifications on the social sphere. People lived in larger, denser and more permanent settlements. Not everyone had to devote their full time to food production, and specialization within society was made possible. Through this, the ideals of expertise flourished.

Expertise Is Fashionable Again

Consumers have been humbled by a disease that exceeds the normal person’s understanding. This has helped foster renewed love of science and a greater appreciation for those individuals and companies with a level of expertise that average people don’t have. Rather than using social media as a source of information, they’re using it to encourage others to “listen to the experts.”

Source: Kahn Academy, The Neolithic Revolution and the birth of agriculture

Source: Netbase Social Listening Insights
“The expert is back in public discourse. Dismissed until recently as an enemy, a self-indulgent blabber, an arrogant armchair intellectual, he returns now as a valuable adviser and ally, someone we cannot do without.”

Rajeev Bhargava, Political Theorist
(Centre for the Study of Developing Society, New Delhi)
Major news organizations around the world opened access to critical information related to COVID-19 and the coronavirus pandemic, giving consumers an alternative to the glut of “fake news” and misinformation.

Among U.S. adults, news websites are trending upward 12.32%, while gossip sites are trending downward 12.5% in the same period (Feb–Mar 2020).

Doctors and medical experts are giving scientific answers to questions by laypersons who are seeking information from sources of true authority.
WHAT TO DO

Know What You Know

Understanding the expertise you provide and how to showcase it will win with post-COVID consumers.

If you offer expertise in your category, make sure your audience can see it – and make sure they believe it. Put your scientists, chemists, engineers and other experts front and center.

Appeal with expertise.

Leverage experts from outside your category to bolster belief in the quality of your own brand. Accreditations, accolades and respected rewards can also help build belief in your brand.
From Me to We

We NEED each other to survive,
now more than ever.
COVID-19 will highlight the true value and impact of togetherness.

**FADING**

**You Do You**

Those previously empowered to prioritize themselves are now limited on time due to their new caring commitments.

**FOREMOST**

**Me vs. We Tension**

During quarantine we have seen a tension between individual responsibility (i.e., hoarding toilet paper) and collective responsibility (i.e., staying home to protect the vulnerable).

**FUTURE**

**Collective Power**

The realization that collective responsibility is the only way to overcome this virus will shine a light on the value of togetherness. Post-corona we will begin to see the rise in collaboration not just between consumers but also between brands.
WE NEED A UNIFIED FRONT

To Beat the Coronavirus

Social For Survival
From the beginning of time, humans have relied on each other to survive. From specific roles when hunting during the prehistoric era to the modern corporate organization – we rely on social networks to achieve common goals.

Collective responsibility faded into the background when it wasn’t essential for survival.

Universal Threat
COVID-19 has declared war on all of us. It’s a common enemy we must fight against together to overcome.

This is no one’s fault. It doesn’t respect borders or discriminate. Every country is at equal risk, and we all have a shared duty to fight back.

As a result, collective responsibility has emerged at the forefront of this pandemic.
“Man is by nature a social animal; an individual who is unsocial naturally and not accidentally is either beneath our notice or more than human. Society is something that precedes the individual.”

Aristotle
Consumers are putting the community first with their generous offers to help those in need. Younger generations are offering to get groceries for their elders, and others are willing to give charitable donations to those who are having financial struggles.

Consumers are encouraging each other to #StayHome and slow the curve, saying it’s a group effort to end the pandemic.
Open Sourcing COVID Hackathon

Tech giants and the WHO organized a hackathon to help solve challenges related to the coronavirus pandemic. #BuildforCOVID19 was open to developers and engineers across the globe.

Ford joins forces with GE and 3M to help ramp up production and supply of medical equipment in wake of coronavirus pandemic.
WHAT TO DO

Connect and Combat

FACILITATE CONNECTION
Brands should facilitate connection with their fans and between their fans through social media platforms to build a strong community.

MOBILIZE COMMUNITIES
Once a community has been formed, help drive action. It doesn’t matter if that action is socializing or activism, it can add value to a consumer’s experience.

BUILD ECOSYSTEMS
Brands are joining forces to tackle a common enemy; why not create relationships now that will outlast the virus?

Image source: https://ya-webdesign.com/images/people-linking-arms.png
03

Ambient Wellness

Health, embedded.
We’re seeing people obsessively reaching for their hand sanitizer as they move (or don’t physically move) through their daily lives. There’s an arising awareness of the toxic impacts of their environment and the lifestyle that it encourages.

**FOREMOST**

*Offsetting the Damage*

As people revert to less hygienic habits, their desire to remain safe and well will be stronger than ever. This will create a huge opportunity for providers of physical spaces to embed health-boosting measures, making staying healthy effortless.

**FADING**

*Hygiene Fluidity*

The world of health, wellness and hygiene is full of good intentions. The problem is good practices are not consistent throughout the population, especially for urban lifestyles.

**AMBIENT**

*Wellness*

If cleanliness is next to Godliness, then my house is a portal to hell.

COVID-19 will require people and the brands they consume to address the confusion around what it means to stay healthy and well.
WE’RE ALL GERMAPHOBES

**With High Expectations**

Healthy means putting in the effort.

Being healthy takes consistent effort. Unless convenient, time-pressed consumers often sacrifice health and wellness practices to make room for other things in their lives. While the desire for good health and hygiene is ideal, the willingness to put in the work is not universal.

Our personal wellness is bigger than us.

Now the world has realized that to see maximum health benefits, we must all make a maximum effort. Aside from virus precautions, one’s hygiene, mental health and physical activity are all top-of-mind. While wellness will now be an expectation, the potential inability to achieve complete health will bring about a sense of fear.
Mental Health Is Top of Mind

26% Average Increase in Consumer Conversation

Now more than ever, consumers are expressing their concern for not just their own, but also for others’ physical and mental well-being.

Source: NetBase Social Listening Insights
Wellness for Sale

China-based automotive interior company Yanfeng developed a Wellness Pod, an antimicrobial device that sanitizes a vehicle’s interior air in just 30 minutes.

New Wearables

Lunya’s sleepwear collection helps wearers recover from workouts by converting body heat into infrared energy and reflecting it back into the body and muscles.

Source: Trendwatching.com, Lunya.co
**WHAT TO DO**

**Be Health-Positive**

Think expansively about where, when and how customers interact with your brand and the impact that interaction has on all aspects of their physical and mental well-being.

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When consumers understand how a company is changing products, services, or experiences to protect customers from the threat of COVID-19, consumers would do the following:

- Trust this brand to keep them safe in the long term: 34%
- Recommend this brand to friends and family: 33%
- Prefer this brand over others: 30%
- Buy more from this brand in the future: 27%
- Be upset that the changes might inconvenience them: 6%
- This would have no impact on their attitude toward the brand: 31%

Base: 501 US online adults

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**PUT YOURSELF IN THE CUSTOMERS’ SHOES**

Identify any negative health impacts they typically endure when engaging with the brand. Can the brand offer health-boosting measures within the environments the customers pass through?

**INNOVATE TO ALLEVIATE**

If the customer is adopting new technologies or practices, the brand should consider how it can help alleviate any previous damage that led to these new practices. Can the brand offer something entirely health-positive – even playful – that aligns with the brand positioning?
American convenience culture is reaching new heights.
With increasingly strict self-isolation measures, the crisis has shown us what’s possible through digital – and is accelerating the adoption, evolution and expectation of services.

**Appointment Viewing**

With traditional entertainment, sports and live events on a hiatus, consumers are turning to digital services for entertainment, driving the growth of video and music streaming, as well as new categories: concerts, ballet, opera, nature watching and more.

**Virtual Everything**

Increased demand for contact-free interactions and advancements in tech are enabling a new breed of virtual and automated services. As companies see the potential operational savings and people begin to enjoy the benefits, this will continue to accelerate.

**Even Grandma Wants In**

The crisis has forced many to adopt digital services to continue day-to-day life that they wouldn’t have embraced otherwise and has further illuminated the digital divide. We’re being forced to close this gap, leading to a more tech-advanced society.
HUMANS ARE HARD-WIRED TO FOLLOW

The Path of Least Resistance

We avoid effortful decisions

Studies show our brain tricks us into believing the low-hanging fruit is the ripest. Why? It’s the easiest to pick.

We’re biased toward perceiving anything challenging to be less appealing. The higher the cost to act, the greater the disincentive to do so.

Protection from COVID-19 requires effort

Whether it’s a stay-at-home order or the hypervigilance required when you do leave, things that were once easy now require a lot of effort.

We’ve been living in the digital age since 1970, but COVID-19 has forced a rapid adoption of digital solutions to maintain normalcy and remove the hurdles it’s presented. Simply put, it makes things easier.

Source: UCL Study, 2017

Image source: Unsplash / Charlotte Noelle

Image source: Unsplash / Adrien Delforge
Analysis of conversation on Twitter points to the rapid adoption of Food Delivery services by an older audience. According to Helixa Discovery Platform’s Interest and Affinity Graph 2020, UberEats has seen a 261% increase in social engagement from February to March 2020. Delivery services will prevail in the post-COVID era.
Traditional brands are turning to digital to provide their consumers utility and entertainment while they remain at home.

Testing Unmanned and Automated Services
Social distancing measures require creative no-contact work and delivery solutions

Source: WSJ.com, Forbes.com, AdWeek 2020
WHAT TO DO

Ride the Wave

Embrace Experimentation

Consumers are welcoming digital innovation in ways they wouldn’t accept in less challenging times. This presents an opportunity for brands to embrace emerging technology, such as AR, digital sampling, 3D design, voice and AI to improve the consumer experience.

Digital as Value-Add

While there’s less sustained demand for new products, look for partnerships or digital opportunities that provide increased value through an enhanced experience or an entirely new offering. For example, a brand could partner with a popular online game to provide outfits for avatars or a new in-game experience. Or a brand could sponsor free delivery or access to premium entertainment through a popular streaming service.
Disasters shock us into remembering our shared humanity.
We build trust through transparency, and, in this unprecedented era of worldwide anxiety, we are drawn to those who truly reveal themselves.

**FADING**

**Human Era 1.0**

We connect with brands that level with us and invite us into two-way relationships. On the other hand, brands that maintain one-way, perfectly orchestrated communications largely forsake these deeper bonds.

**FOREMOST**

**We’re All In This Together**

The ultimate display of empathy is to demonstrate, in a completely open, real way, how the people associated with your brand are also being impacted by what is causing our current challenges.

**FUTURE**

**Human Era 2.0**

Having gained a greater appreciation for how everyday people are behind even our most admired brands, we will permanently elevate our expectations for what it means to be a human brand.
Is to Be Vulnerable

In Search of Trust

As humans we must invest our trust in others to move ahead together while maintaining peace of mind. When another allows themselves to be vulnerable, we instinctively lean in. We are willing to forgive mistakes and overlook imperfections. At the same time, we are predisposed to be wary of others who come across as overly scripted.

Source: Detroit Free Press

Function Over Fashion

The crisis has forced brands and public figures to pull back the veneer and invite people into their lives in an unprecedented way. This new level of unvarnished transparency can often reveal the strength of an underlying brand promise and company culture.
“This is a moment for people to be in authentic places, and we need that kind of authenticity. People are reaching in. They are not polishing their avatars.”

Sherry Turkle
Professor of the Social Studies of Science and Technology at M.I.T.
Outdoor apparel company Huckberry adjusts to new reality. “We wanted to make sure we acknowledged that we’re going through this as well.”

Salesforce CEO Marc Benioff juggles work and personal life from home. After making an insensitive remark, the CEO apologized: “I am learning new levels of sensitivity,” Mr. Benioff said via FaceTime from his home office in San Francisco, where he is holed up amid the region’s shelter-in-place order.
Look Inward

Building deep consumer connections in Human Era 2.0 starts with reinforcing your company culture.

A strong internal culture that empowers employees and guides behaviors is critical to succeeding in this new era of enhanced transparency. The leadership team must encourage the workforce to “be the brand” and entrust them to deliver on the brand promise in an unscripted fashion. When mistakes inevitably happen, be quick to apologize. It’s OK. Mistakes are part of being human.
Taking a stance.

Now, making a change.
“Let me ask you something. Is this a business decision, or is it personal? ’Cause if it’s business I’ll go away happily. But if it’s personal, I’ll go away... but I won’t be happy.”

Gob Bluth
Arrested Development
WHAT’S LEFT WHEN WE Do It Right

In the high-stakes situation of COVID-19, corporations’ true colors are showing, and the public’s outcry has more leeway on their actions. With most people sheltering in place, cancel culture is at its most fluid.

FA DING
Small Applause
Branded movements to bring awareness to causes and changes to business structure to aid in environmental issues are applauded. Corporations should be responsible, but there aren’t many consequences for sitting one out.

F O R E M O S T
Showboating Is Shallow
Consumers redefine the baseline and demand companies do their part in trying times. People can see through disingenuous publicity stunts and demand real change.

F U T U R E
Selfishness = Canceled
Consumers will remember their power and be able to hold brands to the highest of standards, often demanding companies make sacrifices for the greater good.
AT OUR ROOTS,

**Humans Are Altruistic**

Our brains reward *giving* the same as receiving.

**WARM GLOW THEORY**

While economics traditionally states that we will always act in our own self-interest to maximize our own prosperity, there’s a proven, motivating “warm fuzzies” effect that rewards us for self-sacrifice.

*Altruism is built into our human psyche in a way that defies logic.*

Brands must deliver on the “Greater Good,” too.

People are naturally givers, so the brands with which we interact should be, too.

The COVID crisis has sped adaptation to and expectations of this human element of altruism, and brands are expected to bend the profit model for the common good.

Transferable Employees

As 90% of SAS’s airline workers were laid off, the company offered fast-track healthcare training to get them back in the workforce.

Local Support

Uber Eats & Door Dash waived delivery fees for independent restaurants. This generated 34K mentions (potential reach of 62.3M) with a 99% positive sentiment.

Social engagement data shows Uber Eats is trending upward 261%, month-over-month, from February to March 2020.
Social listening shows consumers are interested in corporations and CEOs making changes.

“How this pandemic may forever change the way businesses approach the health and well-being of their most important asset, their people”

(@workwell_being)
THINK BEYOND THE PROFITS

Whether it is through compassionate pricing to alleviate stress or new programs to creatively solve problems imposed by COVID-19, people are looking to brands to do their parts by whatever means necessary.

CORPORATIONS AS COMMUNITY LEADERS

In the future, consumers will remember their power and hold brands to the highest of standards. Opinions will shift as to which companies are good vs. bad, and companies will have to do more for the public.

Businesses that sacrifice profits for people will prove their hearts are in the right place, embracing a newfound purpose as caretakers of customers and employees.
Preparedness
Is the New Prada

“Be prepared.”

Not just a Boy Scout mantra anymore.
### PREPAREDNESS

**The New Prada**

With traditional status signals put on pause during COVID-19, commitment to health-mindedness and efforts to abide by health policies/best practices are lauded.

### FADING

**Quarantine Is Un-American**

The response to policies and action to slow the spread of COVID-19 clashed with American conceptions of freedom, individualism and self expression.

### FOREMOST

**The Neighborhood Watches**

Groups and brands step up to demonstrate, encourage and enforce collective action/readiness to throttle the spread of COVID-19.

### FUTURE

**Prevention as Social Capital**

An acute understanding of how fragile “normal” is will raise the importance of personal preparedness as a way of expressing conscientiousness.
IN A WORLD UNDER QUARANTINE

Antisocial Is the New Social

We want to belong.

We have an innate need to be recognized as part of a group. It guarantees our safety, validates our self concept(s) and differentiates us from others. And the things we use, wear and say – in small, additive ways – communicate whether we’re a part of that in-group or the out-group.

Preparedness is popularity.

COVID-19 has heightened everyone’s actions as community members. Everyone has a leading role in flattening the curve. Visible cues of wellness – face masks, hand sanitizer, physical distance and gloves – are shorthand for community responsibility and worthy of esteem.

Image source: Canadian Lung Association

Image source: Junkee.com
Encourage Social Distancing

The top trending hashtags around everyday life during the COVID-19 pandemic encourage staying home, embracing togetherness and sharing what you are doing to be safe.

Conversation around staying home generated over 1.4 million mentions with over 26 billion potential impressions. The top emotions found in the post reflect that people feel they are making the right choice to promote following health guidelines and being prepared at home.
“Although I am a typical loner in my daily life, my awareness of belonging to the invisible community of those who strive for truth, beauty, and justice has prevented me from feelings of isolation.”

Albert Einstein
Scientist and Loner
Backlash to the “COVIDIOTS”
New York influencers are chastised by fans, media outlets and medical experts for sharing improper quarantine advice.

"I can’t understand Arielle Charnas testing positive, sharing it with everybody, then neglecting self-isolation."


Image source: People Magazine Online

Popularity in Hand Washing
Dettol is a disinfectant company in India that launched a TikTok hand-washing challenge to prevent the spread of COVID. The challenge exploded in popularity. In just four days, the videos accrued 8.7 billion views and included participation from India’s biggest television and movie stars.

Ad Age: “TikTok challenge aims to get more people in India to wash their hands” 2020.
WHAT TO DO

Prioritize Prevention

Meet Consumer Preparedness Halfway
In the post-COVID world, it will be incumbent on brands looking to attract new hires and/or grow consumer affinity to emphasize and publicize wellness initiatives. These range from corporate cleanliness policies and quarantine contingency plans to retail redesigns that are sensitive to the viral potential of physical spaces.

Equip Consumers With Wellness Cache
There will be an expansive return of wellness culture after quarantine. The associations we have with “wellness” will go beyond nutrition and exercise to include un-basic hygiene (i.e., bespoke multivitamins and personalized face masks).
Today’s culture is ever-evolving. Despite reams of data, human behavior remains unpredictable. The internet empowers choice. It also adds complexity to every marketing and media decision. Which is why you need a collaborative agency partner. Doe-Anderson. Together, we will build an unshakable bond between your team and your customers. Built on a foundation of trust. Built through honest, emotive communication. Built to sell more products today while increasing brand equity for the long haul.

125 marketing professionals united by a single mission. We exist to help you win.
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