

# SOCIAL DISTANCING

Social Censydiam

May 2020



# EXPLORING THE MOTIVATIONS BEHIND SOCIAL DISTANCING CONVERSATION

Social intelligence enables us to learn from what consumers are really saying outside of a traditional research context, by analysing unprompted online conversation.

Social Censydiam gives a unique insight into current category needs, motivations and how these motivations are expressed spontaneously in social conversation.

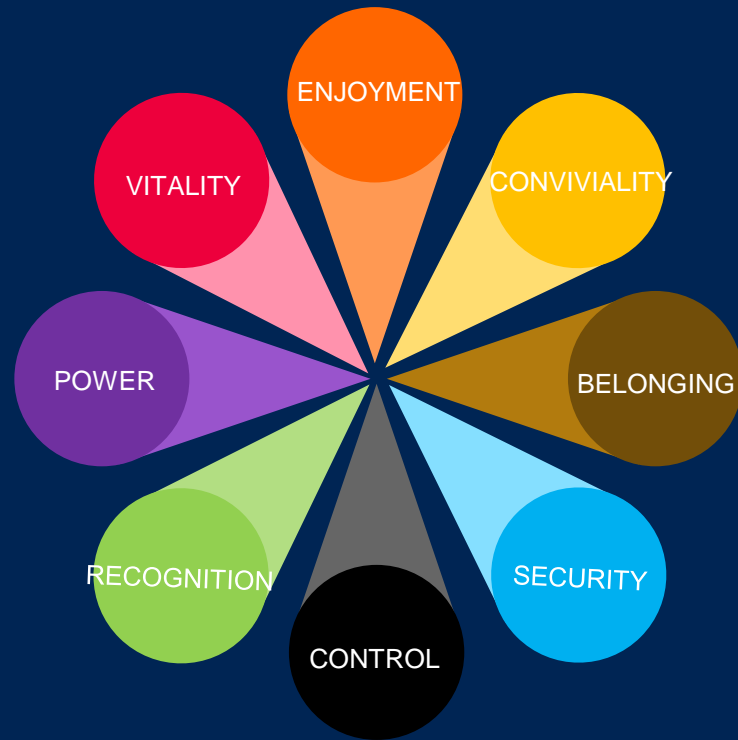
We used our internal team of social intelligence specialists to analyse the data, enhanced by Ipsos analytical frameworks to unpick fundamental human needs (Censydiam) during the time of social distancing.

Brand examples were identified via desk research, and compared against consumer motivations to show how they overlap and/or can be better catered to.



# Social intelligence to capture consumer needs and motivations

## What is Censydiam?

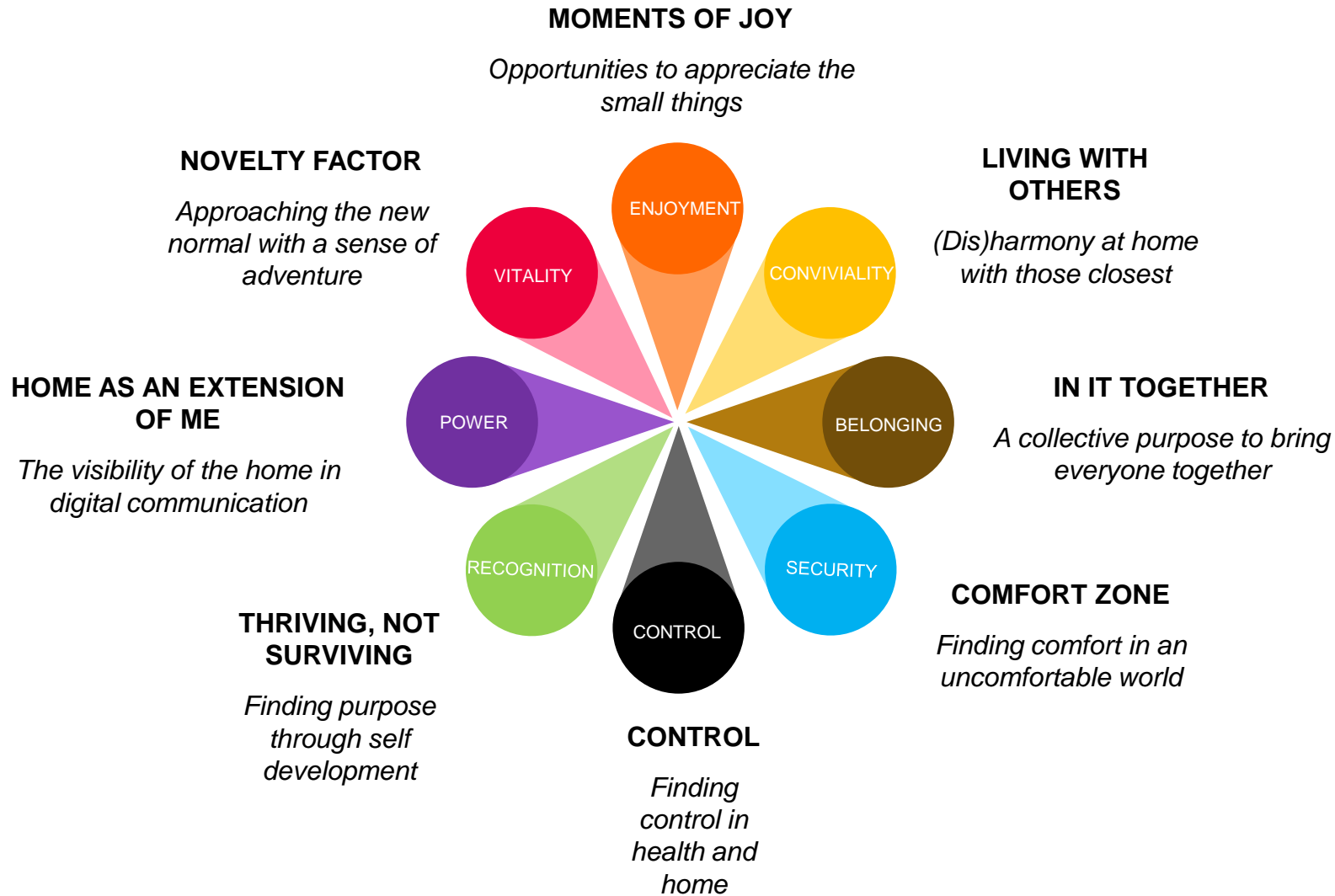


**People centric** – all analysis places fundamental consumer needs at the heart

**Universal** – comparison possible across markets

**Deep** – uncovers deep (often unconscious) emotional response

# SOCIAL DISTANCING IN THE SOCIAL CENSYDIAM LENSE:





# NAVIGATING NEW EXPERIENCES WITH INNOVATIVE TECHNOLOGIES

## CONSUMERS:

The initial experiences of social distancing were a period of firsts – the novelty of the first time working from home, the first food shop, the first video call with family members etc.

However the novelty could be starting to wear off as social distancing continues with no confirmed end point.

Social conversations also look ahead to the novelty of normality when social distancing finishes – the next café-bought coffee, next commute to work, night out etc.

“Breakfast at home is the new normal.

#muesli #soyamilk #coffee  
#flatwhite #socialdistancing  
#coronavirus #corona #workingfromhome #breakfast  
#eat #food #drink #enjoy #tasty #healthy #caffeine”

## BRANDS:

Three unfamiliar experiences that brands have tried to address are the constraints of grocery shopping, the challenge of home-based learning and the spike in online gatherings.

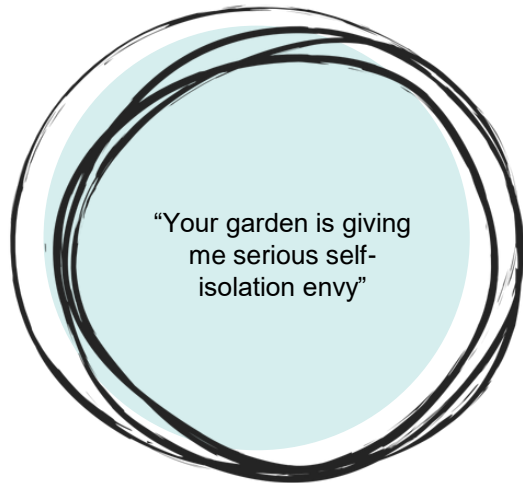
Food brands like Twisted and Mob Kitchen released content series of recipes with limited ingredients, encouraging creativity and improvisation in cooking.

When it comes to school, YouTube and Scouts have launched similar educational resources for various age groups, even offering virtual field trips and live lessons.

Finally, apps have become especially important in helping people socialise. Netflix Party allows simultaneous viewing and chatting amongst users, and Brewdog Open Arms is even offering virtual beer tastings, live music and homebrew masterclasses.



# HOME AS THE EXTENSION OF SELF & NEW VULNERABILITIES



## CONSUMERS:

With the importance of video interactions at home for both professional and personal life, our home life and aesthetics have never been more on display to others.

The aesthetics of our home become an opportunity to express ourselves and our identity (or projected self) to the wider world.

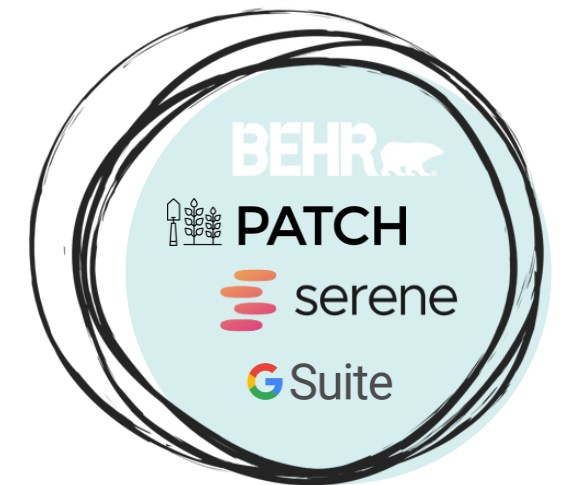
The adoption of video for communication in these times gives access to our homes and surroundings to those previously not deemed to be close enough to be invited (e.g. work colleagues).

## BRANDS:

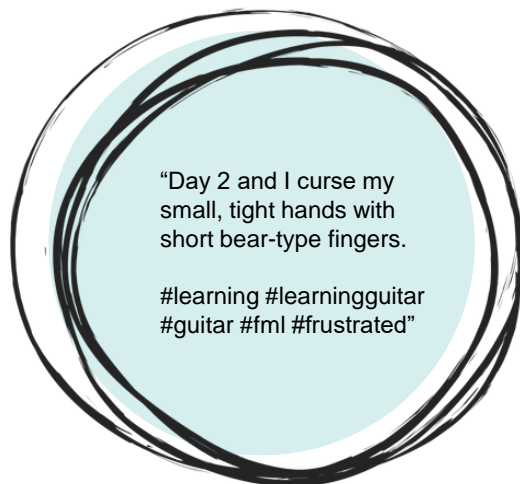
With more people on video calls, Behr Paint introduced 'Behr Your Background', a free library of styled homes, while Patch is encouraging consumers to 'up their Zoom game with some plant styling' – product suggestions are even organised by home office styles.

Working from home whilst juggling family life also impacts productivity and efficiency. Brands like Serene help users block distracting apps/websites, and offer focus enhancers. Google also made its premium G Suite productivity tools free of charge till July, helping businesses and educators adapt to work from home policies.

At the same time, the media has labelled work-from-home video conferencing tools as a "privacy disaster waiting to happen". Zoom, in particular, has been under pressure to fix several security issues.



# TENSION BETWEEN THRIVING AND SURVIVING IN THESE TIMES



## CONSUMERS:

Consumers are building in time for self improvement in new routines and daily life – exercise, online courses, cooking / bakery etc.

They are seeing time in isolation as an opportunity to improve in some way and take advantage to new wealth of online resources which are being created by brands, influencers and organisations.

However, there is also a backlash to this way of thinking in social conversations. Those who feel a sense of anxiety over current circumstances and believe the added pressure of self-improvement could be detrimental to mental health.

## BRANDS:

Brands are helping consumers thrive in three main ways – keep fit, provide cultural enrichment and upskill them to do things themselves.

FightCamp for example, allows people to turn their space into a makeshift boxing ring with free-standing bag, gloves with punch trackers and an app with hundreds of classes to train with.

Brands are also catering to consumers' desire to stay culturally and creatively engaged. Google Arts & Culture continues to offer virtual tours of over 2,000 museums around the world, while 'Let's Day In', lets users meet online for book clubs, themed experiences and art classes.

Brands are also publishing more how-to content, so consumers are not only pursuing existing interests but also picking up new ones. Ruffians for example, is using their Instagram page to offer hair grooming and styling tutorials.



# KEEPING CONTROL OF HEALTH AND SAFETY

## CONSUMERS:

Some social distancing behaviours demonstrate our motivation to find a sense of control. While the wider circumstances cannot be controlled, we can control our own routines, home and health.

Social conversation shows how new routines have been developed quickly to help get through the day and feel productive.

Meanwhile, a sense of control is also found through preventative health measures and heightened awareness of cold/flu symptoms.



## BRANDS:

Brands are offering functional, reactive solutions to help consumers stay in control. For example, the 'Crowdless' app gives real-time updates on essential locations and suggests less crowded alternatives nearby.

Brands are also quick to react to the shortages of medical supplies. Amongst the first was BrewDog, which worked with its distillery to create sanitisers, and LVMH using its perfumeries to make hydroalcoholic gels for hospitals.

Meanwhile, social media platforms have ramped up efforts to counter the infodemic accompanying Covid-19. Whatsapp is working on a chatbot that could answer health related queries, YouTube said it has reduced recommendations of conspiracy theories related to 5G and coronavirus, while Facebook is banning ads promoting coronavirus "cures".





# SEEKING COMFORT IN AN UNCOMFORTABLE WORLD

## CONSUMERS:

As the world outside becomes increasingly frightening and the news updates faster than ever, people are seeking comfort within the environment they can control (their home).

In particular, social conversations show a greater focus on mental health and looking after oneself. People feel more licenced to take a pause from their previously busy lives and relax.

Hygge, cocooning, pyjamas days – whatever it takes to get through, it is ok to have.

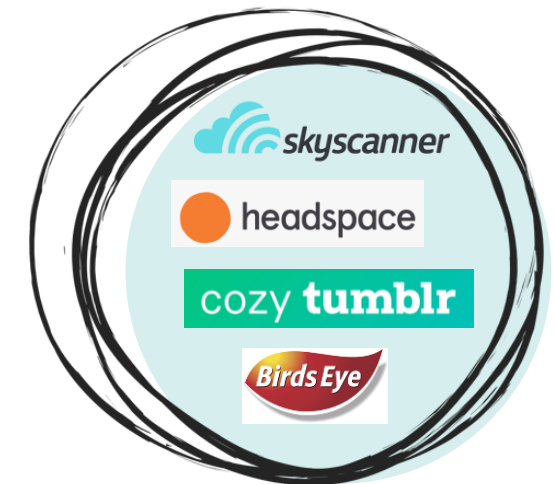
## BRANDS:

In uncertain times, familiarity and consistency is an important source of comfort to consumers. With frozen food sales rocketing, Birds Eye sees itself as a 'brand of reassurance,' and its 'What's for Tea?' campaign was launched to show that the brand is there for consumers during the crisis.

To combat the constant stream of negativity in a time of crisis, Tumblr has launched 'Cozy Tumblr.' The blog, intended as a safe space for users, is a curation of feel-good content featuring home baking, animals and DIY projects.

Brands are also showing empathy and helping consumers stay optimistic. In Skyscanner's social media campaign #WeWill, consumers are invited to share stories of where they will go and who they will see once the pandemic is over, reminding them that there is something to look forward to.

"I've really just been switching between 'daytime' and 'nighttime' pyjamas for the last two weeks and tricking myself I'm ready for the day"




# SHOWING SOLIDARITY IN TIMES OF CRISIS

## CONSUMERS:

Public discourse harks back to wartime and results in a spirit of togetherness where we recognise that we are only strong when we are united.

Social media sees people from all walks of life coming together to run charity fundraisers (e.g. #nhstogether, #twopointsixchallenge); remind each other that we're in the same boat (e.g. #stayhome) and show gratitude (e.g. #clapforcarers and #thankyounhs).

As consumers, each face-to-face and online experience becomes more significant as we try to make purchases in an environment of delays and limited supply – resulting in heightened scrutiny and/or celebration of brands who are getting us through or failing to do so.



“Oliver enjoyed making rainbows and clapping for our amazing NHS staff and keyworkers”

## BRANDS:

Brands are showing solidarity by protecting frontline staff and helping those with financial struggles.

Many are offering generous discounts for NHS workers, and some are delivering goods, like food and hand cream, to hospitals. Brewdog, Barbour & Nissan are going even further by repurposing their factories to produce equipment to keep NHS staff safe at work.

The financial impact of lockdown has also been devastating for several industries, including beloved pubs in the UK. At risk of collapse without a bailout, Budweiser launched a £1m gift card initiative whereby consumers can pre-purchase drinks. Meanwhile, ‘Spotify Covid-19 Music Relief’ has been set up to support independent musicians and bands unable to perform and tour during this time.

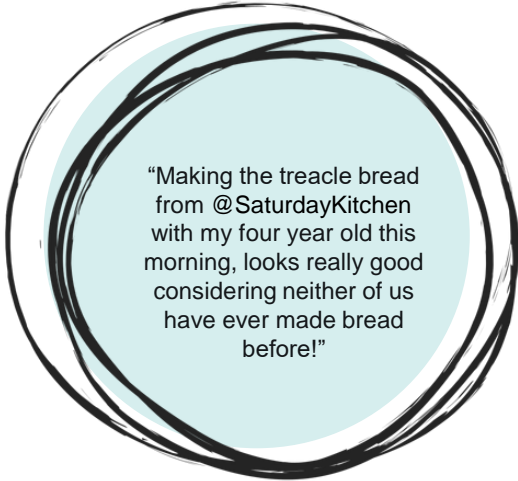


# ENTERTAINING, CONNECTING AND CARING FOR EACH OTHER AT HOME

## CONSUMERS:

People are fostering conviviality at home and sharing it online, gaining social currency and engaging with others (e.g. pictures of children's rainbow paintings, posting Zoom screenshots, sharing #sourdoughtstarter tips). This helps diffuse the tension of the new pandemic world when it is needed most.

Where, previously, long trips may have been needed to connect with long-distance friends and family there is now a justifiable excuse to move these online – allowing us more time with loved ones in a medium we may have felt guilty about before.



"Making the treacle bread from @SaturdayKitchen with my four year old this morning, looks really good considering neither of us have ever made bread before!"

## BRANDS:

Brands have focussed on new ways for consumers to entertain, stay connected and check in on each other.

Under normal circumstances, Persil encourages outdoor play and learning. However, the brand is now persuading families to try fun indoor activities in their campaign #HomeisGood.

Also to consider are those who aren't lucky enough to be with loved ones during the crisis. ITV is encouraging Britain to keep talking to each other, focussing specifically on those who may not be top of your call list. The campaign addresses those more likely to be experiencing loneliness; including a social media shy dad, a vulnerable ex-partner and an A&E worker. Similarly, PG Tips has altered its 'Share a Cuppa' scheme, urging consumers share a virtual cup of tea.



# NEW WAYS TO ENJOY LIFE IN LOCKDOWN

## CONSUMERS:

This is all about appreciating what we have; big or small, the pandemic has re-focused our priorities. More posters on social media are celebrating the little joys in life, from the taste of good coffee to the smell of flowers on our daily exercise.

On top of this, a new genre of entertainment has emerged on socials; inter-generational fun. As many young people move back to their parents' to sit out the quarantine, cultures are colliding. Nowhere is this more visible than TikTok; parents are learning new dances, getting involved in new music, and having fun with new tech.

Those that are separate from their families are introducing parents and grandparents to digital meetings, creating a new way for us to enjoy one another's time no matter what.

## BRANDS:

Brands are catering to consumers' need for enjoyment; helping them reinvent comforting experiences, offering social simulation and encouraging joy in the little things (Oreo's Stay Home Stay Playful campaign nails this.

As consumers miss small things like their morning coffee, Pret is bringing forward the launch of its retail line, allowing consumers to purchase their favourite coffee-shop-coffee from supermarkets.

When it comes to providing escapism in times of loneliness, Animal Crossing has achieved great success and is the top-selling title this lockdown. It offers a nostalgic small town life and allows players to spend time with friends on their islands, with some throwing surprise birthday parties (and even celebrating their weddings, which had been cancelled in real life).

"Managed to spend the eve teaching my Grandparents to FaceTime. Good prep I think for coming months and got a family one going. Entering the Wi-Fi code took a frustrating hour on the phone. Learning to point the camera at the face will be the next lesson"



# In summary, brands are offering a mix of functional and emotionally led solutions, with greater room to consider longevity (what comes next in the new normal) and more validation of anti-productivity and playfulness in an environment of uncertainty and change

## **NOVELTY:**

Help navigate novel experiences with innovative technologies, but also think of what's coming next as the next wave of adjustments arrives

## **POWER:**

Optimise aesthetics, productivity and privacy of home, but also help consumers use home as a reflection of playfulness and personality as the constant need to create 'the perfect aesthetic' is pressurising

## **RECOGNITION:**

Resources helping consumers pursue existing interests & pick up new ones are great, but also consider 'accessible achievements' as some also view self-improvement in this period as a false need / not within reach

## **CONTROL:**

Keep consumers safe with direct action and being flexible with production lines. Direct action and support in these times will be beneficial long term

## **SECURITY:**

While well-being waivers, brands need to be even more present and supportive. Be a meaningful source of familiarity now and hope for the future

## **BELONGING:**

Continue helping sectors most affected by the crisis, as consumers look for brands and services that can mirror their acts of solidarity at the moment

## **CONVIVIALITY:**

Encourage people to entertain, connect and care for each other at home – and help them maintain these relationships when lockdown ends

## **ENJOYMENT:**

Inspire new ways to enjoy life in lockdown and validate consumers' need to 'just have fun'



# THANK YOU.

Ipsos UU

**Nurfarah Mattar**  
nurfarah.mattar@ipsos.com

**Amy Thomson**  
amy.thomson@ipsos.com

**Rosie Kidd**  
rosie.kidd@ipsos.com

**Nadia Hawkins Gaboc**  
nadia.hawkins-gaboc@ipsos.com

All rights reserved. Contains Ipsos' Confidential and Proprietary information and may not be disclosed or reproduced without the prior written consent of Ipsos.

The contents of this document constitute the sole and exclusive property of Ipsos Mori (“Ipsos”) and may not be used in any manner without the prior written consent of Ipsos. Ipsos retains all right, title and interest in or to any of Ipsos' trademarks, technologies, norms, models, proprietary methodologies and analyses, including, without limitation, algorithms, techniques, databases, computer programs and software, used, created or developed by Ipsos in connection with Ipsos' preparation of this document. No license under any copyright is hereby granted or implied.

The content of this report is provided for the sole purpose of research insights by Ipsos contracted client to whom it is presented in the jurisdiction to which the presentation relates. The content that was used to develop this research such as images, video material, quotes and other third-party content, contained in the presentation have been drawn from publicly available web sources. Therefore, it is not possible to obtain any and all permission for use of certain content.

The contents of this document are confidential, proprietary and are strictly for the review and consideration of the addressee and its officers, directors and employees solely for the purpose of evaluating the contents hereof including, but not limited to, any services to be provided by Ipsos. No other use is permitted, and the contents of this document (in whole or part) may not be disclosed to any third party, in any manner whatsoever, without the prior written consent of Ipsos.