

THE GREAT REFRESH

VALUES RESET IN THE AGE OF COVID-19

FROM THE GREAT RECESSION TO THE GREAT REFRESH

In the face of immense tragedy, chaos and disruption, COVID-19 is changing the way societies around the world think, work and support one another—accelerating our digital transformation.

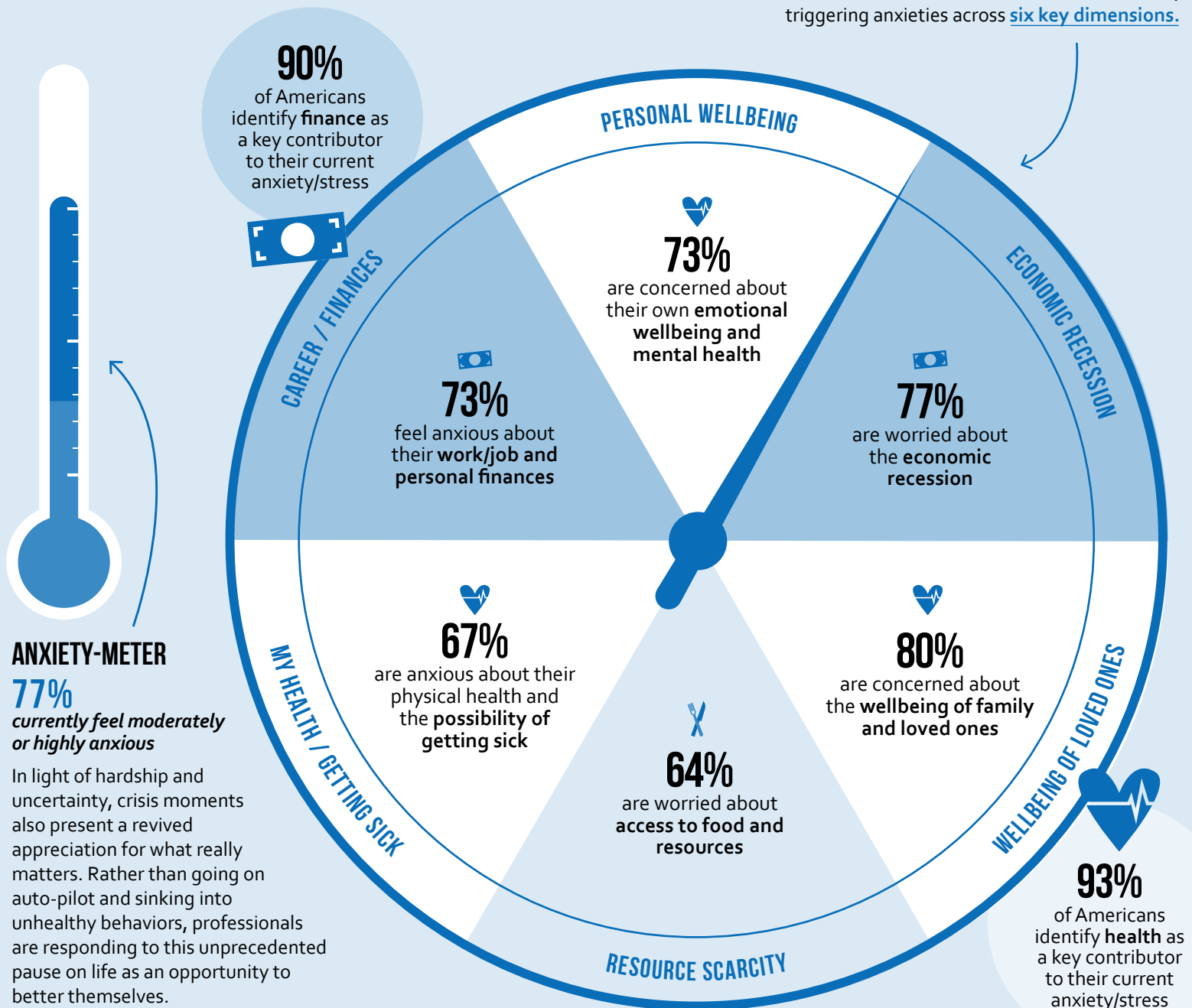
In the Great Recession, economics drove decision making. In the midst of a health and economic crisis, human values are driving decision making. Could this period be the Great Refresh?

89%

of Americans say *COVID-19 is a good time to reflect on what's important to them*

BRACING FOR THE PEAK

Anxiety casts a tall shadow as Americans—now one month into their new work-from-home (WFH) norm—are encountering new pressures. Health and financial concerns are front of mind, triggering anxieties across [six key dimensions](#).



88% of consumers say *I'm actively working on a way to improve my life*

"It has made me connect to loved ones more and focus more on my personal well being and health."

- FEMALE, 24

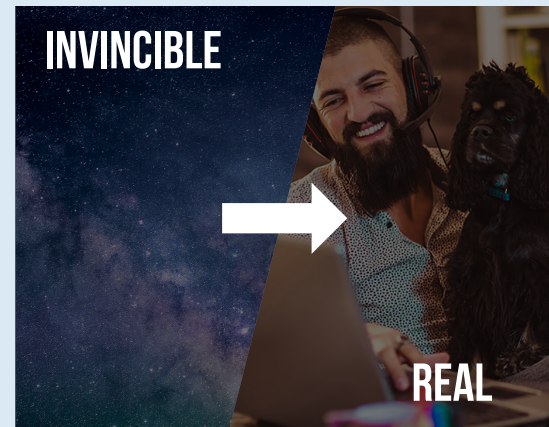
"I have had a lot of time to actually sit and think about my life, where am I going in the future. Removing what no longer serves me any good and being happy with what I have."

- FEMALE, 35

"It's allowed me to recharge my batteries by getting the chance to work from home and I've also been able to reconnect with my wife."

- MALE, 48

THREE KEY PIVOTS



HOW WE THINK: FROM OUTWARD TO INWARD

PROGRESSING & PROTECTING

TOP NEED STATES

Forget FOMO; people now fear not being productive. Inward reflection is getting people in touch with their goals, and 8 in 10 expect to come out of this pandemic changed for the better.

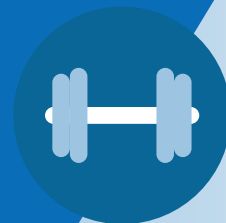
The number one need state, across all generations, is **productivity**, followed by **safety**—and the two are intertwined given the economic climate.

Naturally, with more free time, consumers are filling their day with activities that meet their needs—turning to wellness and self-care to feel productive and safe; connecting and communicating with others to remain connected, informed and hopeful; and leaning into entertainment when they need to escape.

FOUNDATIONAL NEED STATES

Feel productive
(49%)

Feel safe
(47%)



92%
are turning to wellness and self-care

CONTROLLING EMOTIONAL RESPONSE

SECOND TIER NEED STATES

Informed
(42%)

Connected
(42%)

Calm
(41%)

Hope
(40%)



83%
are turning to communication & connection

ESCAPE

THIRD TIER NEED STATES

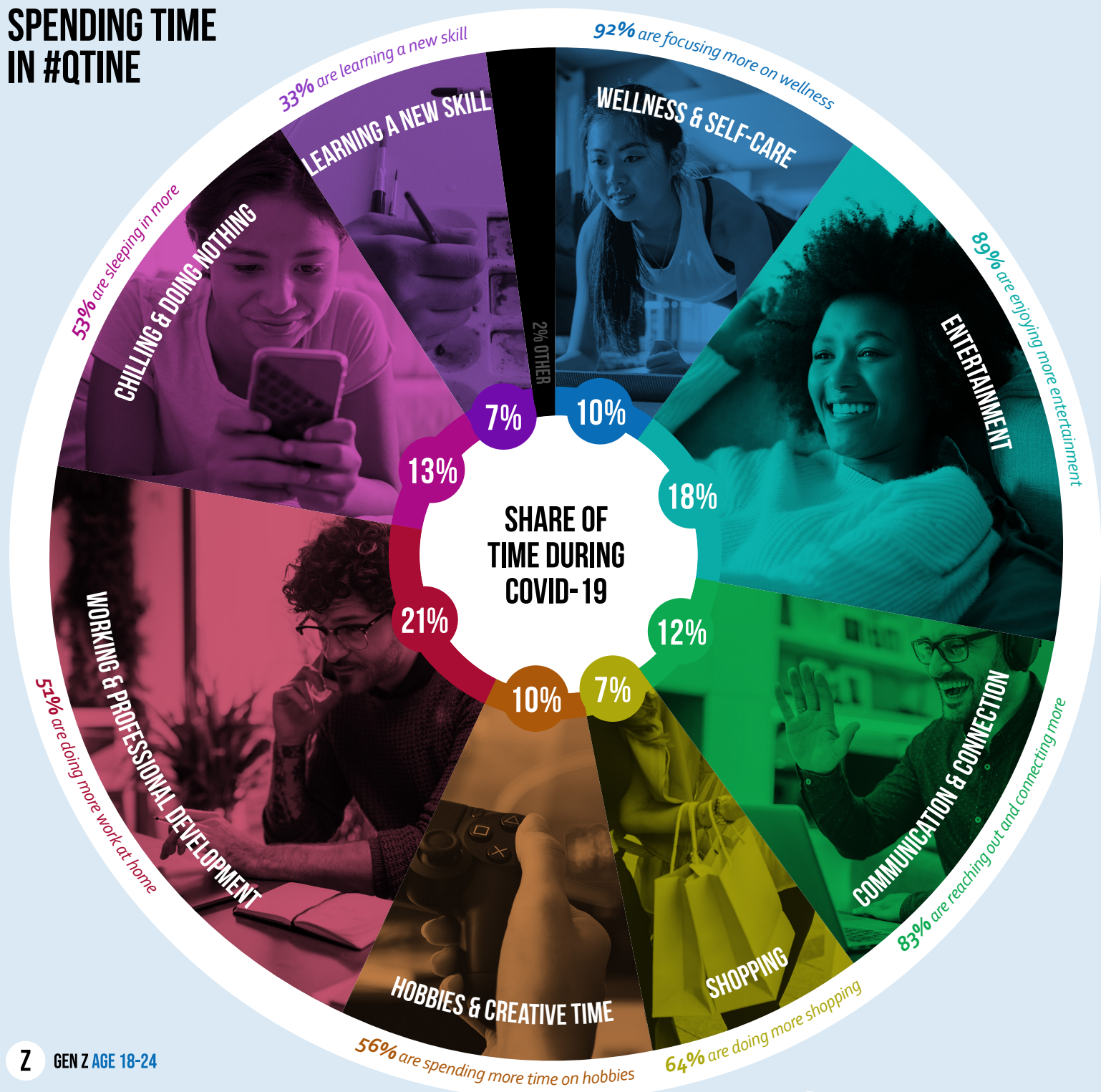
Entertain me (36%)

Make me laugh
(37%)



89%
are enjoying more entertainment

SPENDING TIME IN #QTIME



Z

GEN Z AGE 18-24

In just the past month, Gen Z, the most digitally-savvy generation, went from being the least well-adjusted to our new WFH norm in March—citing difficulty to disconnect, struggling the most from missed in-person collaboration, and tending to lack the right environmental set-up—to finding new hacks in April. Gen Z are doing what they can to stay fit: mentally and physically, with 1 in 3 now cooking, meditating and exercising for the first time.

They're searching for self-regulation and control in a world where science fiction has become nonfiction.

M

MILLENNIALS AGE 25-39

Millennials are coping by learning to DIY, and staying connected. When we asked what initial concerns they had at the start of our new normal, pain points included loneliness from missed social interaction, and feeling less engaged with who they're speaking with. New behaviors adopted by approximately 1 in 4 Millennials include shopping for essentials, chatting on dating apps, DIY/home improvement and professional networking, suggesting a tendency to control their emotional response through connection.

X

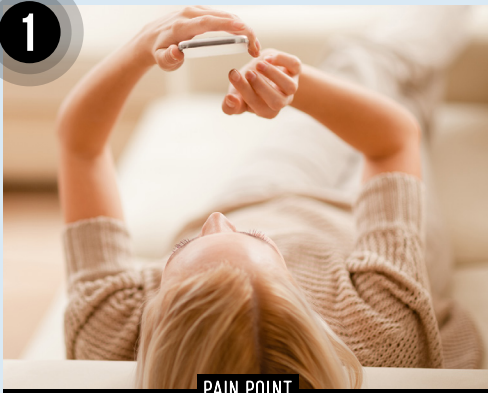
GEN X AGE 40-54

Gen Xers—the generation most likely to be parents—is overcoming the distraction of WFH life by finding calm and making time for face-time. 1 in 3 have adopted new behaviors including meditating and not work-related video calling.

And these aren't temporary elixirs. Many of these newfound habits are proving to be worthwhile, and consumers want to continue doing them even after the pandemic subsides—with tech as an enabler for these experiences.

PAIN POINTS IN ADAPTING TO WORKING FROM HOME

1



PAIN POINT

29%

Easily distracted while working from home

Z

Gen Zers report difficulty to unplug/disconnect from technology

2



PAIN POINT

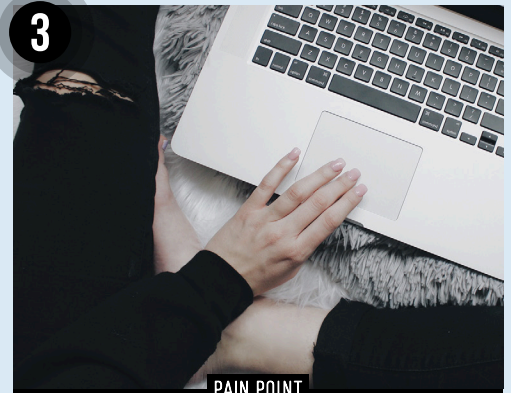
27%

Loneliness from missed social interaction

M

Millennials experience loneliness from missed social interaction

3



PAIN POINT

25%

Wish I had access to the devices I have at work

X

Gen Xers struggle with distractions

NEW BEHAVIORS IN RESPONSE TO COVID-19, BY GENERATION



VICES

16%
average



PROFESSIONAL

18%
average



CREATIVITY

23%
average



SHOPPING

26%
average



COMMUNICATION

34%
average



ENTERTAINMENT

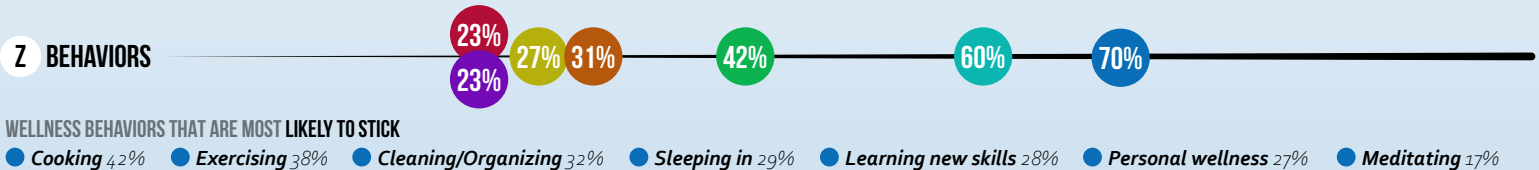
41%
average



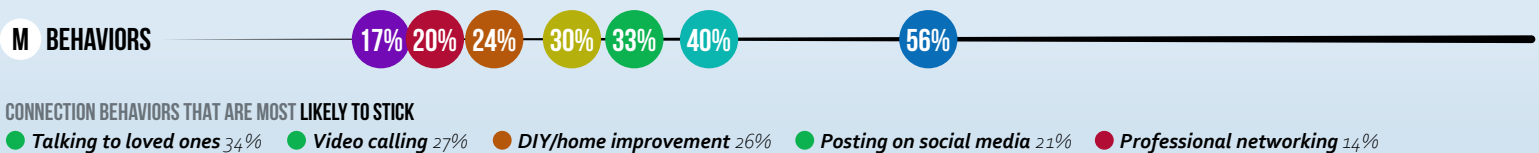
WELLNESS

55%
average

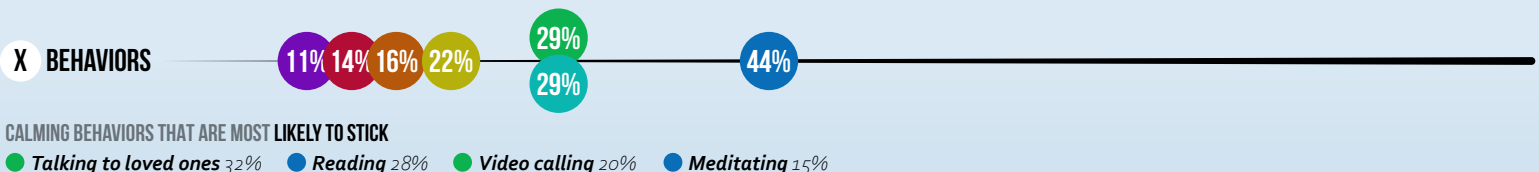
Z BEHAVIORS



M BEHAVIORS



X BEHAVIORS





HOW WE **WORK:** FROM TECHLASH TO TECH ASCENDING

Gone are the days when technology was thought to polarize society. Now it unites us.

Pre COVID-19, at peak privacy, misinformation and anti-trust concerns, most Americans (60%) believed major tech companies do more to divide the country than to unite it—while only 11% believed the reverse to be true.¹

Americans—out of necessity—are re-thinking their impressions of the tech industry and “hitting refresh” on their relationship with technology, with a bold majority finding technology to be the solution for a better society.

Companies are defining, on the fly, what business as usual will look like, and the tech titans were the first to: 1) initiate shelter from home; 2) give financial stimulus to their advertisers, media and employees, and 3) provide the tools we need both for productivity and to combat the health crisis.

Beyond productivity tools, **2 in 3 Americans are excited about how technology can accelerate positive trends on the other side of the curve.**

88%

of Americans have a **better appreciation for technology and its positive impact** on culture and society throughout this pandemic.



A more productive, efficient & informed society:

from fast grocery/food delivery services with wide selections and real-time stock updates to smart productivity apps that allow you to track projects and self-progress efficiently



A more collaborative global workforce & connected social communities:

from live collaboration tools that allow users to share real-time updates with one another to social virtual worlds that are bringing people together around the world



Innovations in healthcare:

from smart devices/watches - leveraging tools that monitor fitness to detect early signs of sickness to supercomputers to run faster disease simulation in various scenarios to speed up vaccine development

HOW WE SUPPORT ONE ANOTHER: FROM INVINCIBLE TO REAL

The virus as a common enemy is bringing us closer together.

The number one behavioral change people say is having a positive impact in their lives, that they hope will stick, is changed communication, led by talking to loved ones more frequently.

How culture is changing to reprioritize family and intimate relationships is somehow, sometimes rather inelegantly, seeping into the workplace and potentially changing it in permanent ways. It's time to embrace our kids, pets and spouses as we all try to define a new work etiquette. Instead of apologizing when our kids enter our Zoom calls, we can relish their vulnerability and authenticity. Serendipity is appreciated more than ever.

Ironically, perhaps we can be more real in digital environments than in the physical world.



72%
of professionals say that this pandemic will have a positive impact on how we communicate with each other in the future.



A LOOK TO THE FUTURE

Now that we're freed up from the physical workspace that, by design, tends to be optimized for control, command, and consensus; we're moving into uncharted territory through the ultimate open work space: a space where new values are emerging that center on openness, transparency and trust.

Leaders will need to lean into the Great Refresh by tapping into a new set of values:

SELF-CARE

Never has it been clearer that self-care is intertwined with productivity; savvy employers will maintain an eye towards mental health.

PEOPLE = PROFITS

Employers are recognizing people and their profits as equally important, and tech companies are leading the way in offering transparency in the face of insecurity.

THE OPEN WORK SPACE

The workspace of the future is wide open space for more trust and creativity to be imbued in our day-to-day.



**National
Research
Group**

National Research Group | A leading global insights and strategy firm at the intersection of content, culture and technology. We uncover insights for bold storytellers everywhere.

METHODOLOGY: National Research Group fielded this study from April 9th-11th, 2020, by using an online quantitative survey with a nationally representative sample of N=1003 participants. NRG surveyed 18-54-year-olds who are full-time, part-time, or self-employed, and either currently working from home, or with previous remote work experience. The sample was provided by Prodege, Dynata, CINT, Market Cube, and Pure Spectrum.

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