

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.

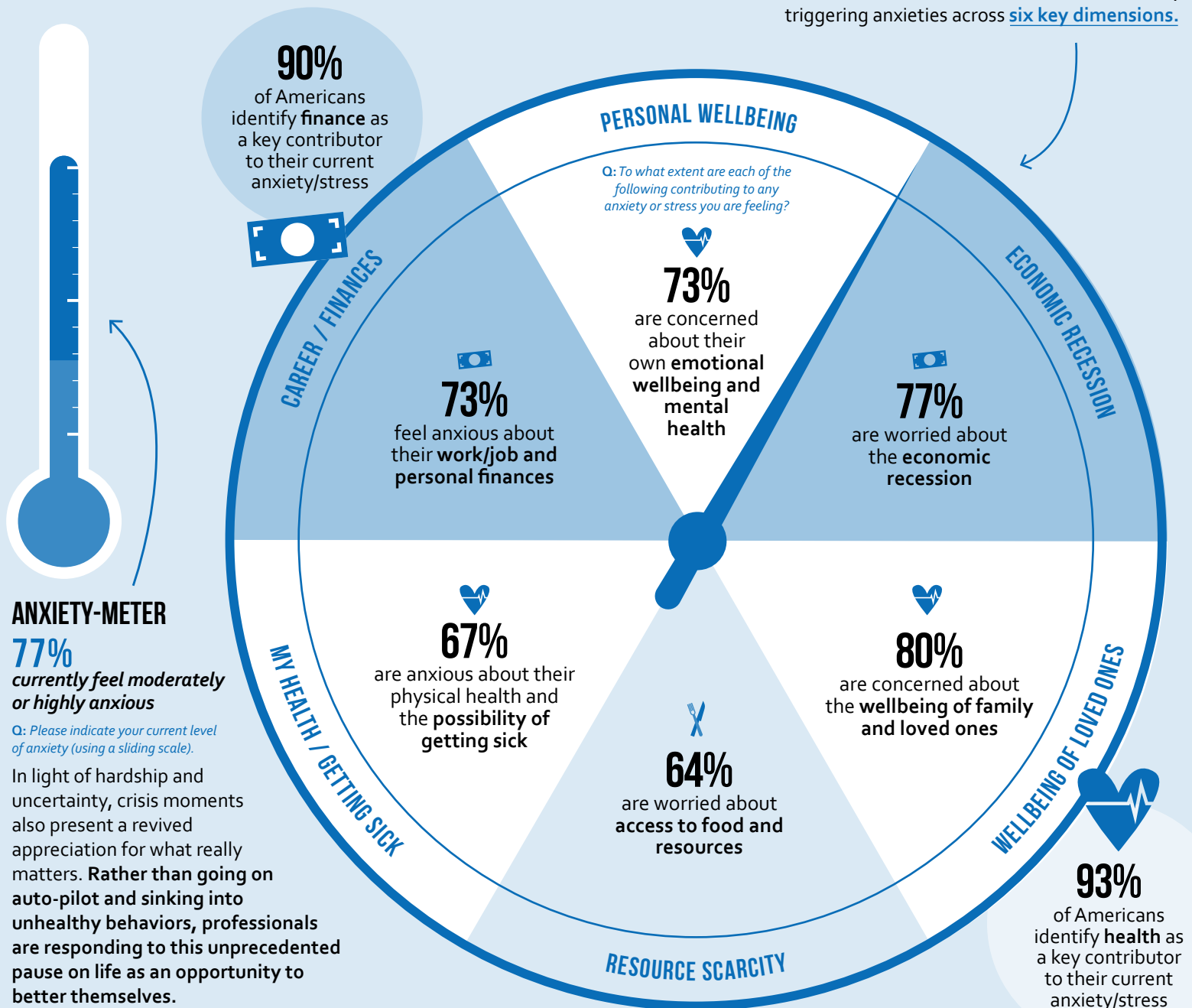
In the Great Recession, economics drove decision making. In the midst of a health and economic crisis, human values are driving decision making. Could this period be the Great Refresh?

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

- FEMALE, 24

"I've had a lot of time to actually sit and think about my life, and where I'm going in the future. I'm removing what no longer serves me any good and learning to be 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

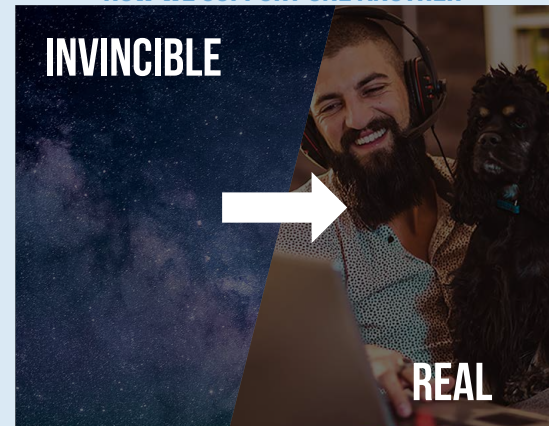
HOW WE THINK



HOW WE WORK



HOW WE SUPPORT ONE ANOTHER



HOW WE THINK: FROM OUTWARD TO INWARD

PROGRESSING & PROTECTING

Q: As you go through your day-to-day right now, which of the following needs are you most looking to fulfill?

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.

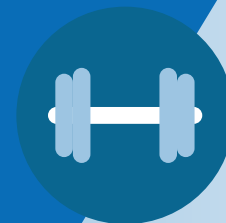
The number one need state, across all generations, is **productivity**, followed by **safety**—and the two are intertwined given the economic climate.

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

Gen Z is especially looking for things to entertain them and make them laugh:

Entertain me

Z 47% M 37% X 27%

Make me laugh

Z 43% M 38% X 32%

SPENDING TIME IN #QTINE

To better understand the extent to which changing need states are driving changing behaviors, we asked consumers: 1) how they are allocating their time to different activities, and 2) what activities they are doing more of during COVID-19. The three biggest shifts in terms of how people are spending their time are among the **92% of consumers focusing more on wellness**; **89% of consumers enjoying more entertainment**, and **83% reaching out and connecting more to one another**.



TOP COPING BEHAVIORS

Q: Which of these activities are helping you cope with stress or anxiety related to the coronavirus pandemic?

We see these three big shifts echoed in the elixirs consumers say they are turning to **specifically to cope with anxieties** they are experiencing amid COVID-19.



Watching video content



Exercising/fitness



Listening to music



Talking to loved ones



Cooking

ACTIVITIES PEOPLE ARE DOING MORE DURING COVID-19

Q: Which of the following activities are you doing more of since the beginning of the coronavirus pandemic? % indicates frequency of selection.

Z M X signifies that a generation overindexes



WHAT WE'RE DOING MORE, AND WHAT WILL STICK

Z GEN Z AGE 18-24

Gen Z are doing what they can to stay fit: mentally and physically, with 1/3 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.

Beyond wellness, Gen Zers are leaning into entertainment more heavily than other demographics: increasing time spent watching online video, listening to music, and playing mobile games on their phones. Learning and self-improvement behaviors are those they believe are most likely to stick on the other side of the curve.

M MILLENNIALS AGE 25-39

Millennials are coping by learning to DIY, and staying connected. Their pain point in adapting to the new normal included *loneliness from missed social interaction*. New behaviors adopted by approx 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. The behaviors they report to be most likely to stick are *talking to loved ones* and *video calling*.

X GEN X AGE 40-54

Gen Xers—the generation more 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*. Xers craving safety in the face of uncertainty will continue *talking to loved ones* and informing themselves by *watching/reading the news*.

POSITIVE IMPACT

And these aren't temporary elixirs. The biggest proof point is how much consumers are **finding value in their new habits**.

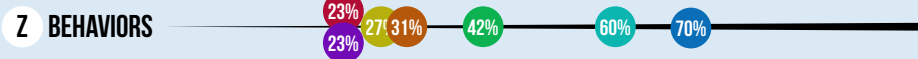
Many newfound habits are proving to be worthwhile, and consumers want to continue doing them even after the pandemic subsides—with tech as an enabler for these experiences.

83%

say they're developing habits now that will have a positive impact in my life moving forward.

NEW BEHAVIORS, BY GENERATION

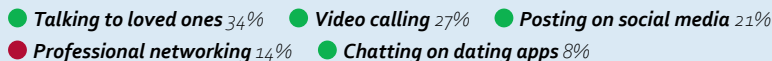
Q: Which of the following activities did you start doing only after the start of the coronavirus pandemic? Which of the following activities are you enjoying so much that you will likely continue doing them even after the coronavirus pandemic ends?



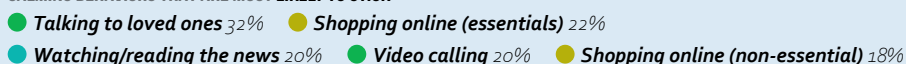
WELLNESS BEHAVIORS THAT ARE MOST LIKELY TO STICK



CONNECTION BEHAVIORS THAT ARE MOST LIKELY TO STICK



CALMING BEHAVIORS THAT ARE MOST LIKELY TO STICK



#TECHFORGOOD

88%

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

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 miscues, 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.

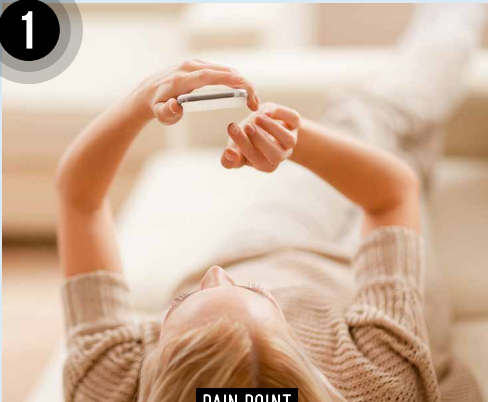
Companies are defining, on the fly, what business as usual will look like, and the tech titans were the first to: 1) initiate shelter from home; 2) give financial stimulus to their advertisers, media and employees, and 3) provide the tools we need both for productivity and to combat the health crisis.

ENABLING US TO WORK-FROM-HOME EFFECTIVELY

New solutions are emerging to solve for pain points experienced by professionals adapting to a new work-from-home (WFH) norm. At the beginning of America’s work-from-home orders in mid-March, we talked to over 1000 professionals to better understand their state of mind and adjustment curve.²

TOP 3 PAIN POINTS

1



PAIN POINT

Easily distracted while working from home

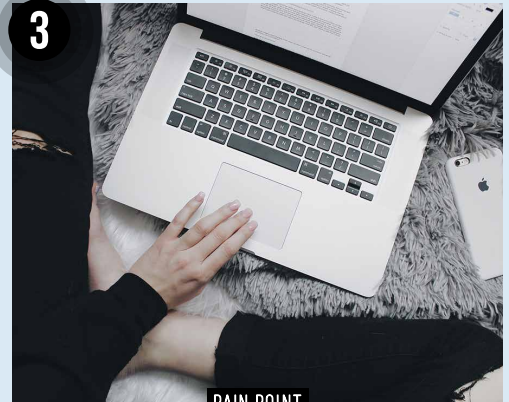
2



PAIN POINT

Loneliness from missed social interaction

3



PAIN POINT

Wish I had access to the devices I have at work

Q: Which of the following issues do you face when trying to work remotely?

Challenges felt by the entire new WFH ecosystem are amplified when we look to the youngest generation, Gen Z. Gen Z-ers struggle to disconnect from the tech, citing irritation from too much screen time and bad work-life balance, well ahead of any other group. This impacts mental health: nearly half of Gen Z say staying home all day makes them depressed (+15 points over Gen X). Further, they tend to lack the necessary technical/environmental set-up to be as productive.

Gen X, on the other hand, has much more preparatory experience under their belt: having lived through lay-offs and significant hardship with the Great Recession, and possessing deeper work experience. They are the most pro-WFH demographic and much more self-sufficient—they don't mind staying inside for long periods of time and enjoy the benefits of freedom and convenience.

¹Gallup-Knight - March 2020

²National Research Group - March 2020 - <https://www.nationalresearchgroup.com/news/ready-or-not-the-future-of-work-is-here>

WHITE SPACE FOR NEW SOLUTIONS

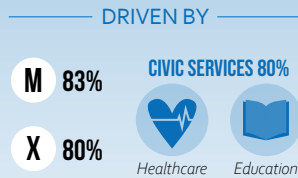
Q: How useful are the following features for working from home?

At a foundational level, we need better communication. Solutions that enable live and asynchronous collaboration are key to maintaining focus and fostering better results through enhanced creativity and connection. **More than 3 in 4 professionals would find the following solutions useful:**



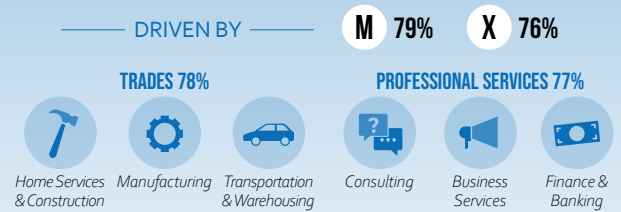
1

Shared documents for seamless real-time updates



2

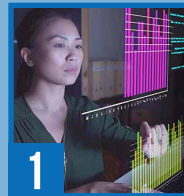
Reliable communication with multiple colleagues



Crossing the chasm to virtual will require a major shift in how business is done.

NEXT-GEN VIRTUAL ENVIRONMENTS BEAR STRONG FUTURE POTENTIAL

~7 IN 10 professionals would find the following next-gen solutions useful:



1

Hands-free screens on-the-go

(69%)

work from anywhere from multiple screens, enabling real-time collaboration; watch anything, anywhere at the size you want



2

Virtual events

(67%)

participate in industry forums through remote conferences/forums, meeting new people, or entertaining clients digitally with engaging alternatives to in-person meet-ups



3

Document/record memories

(66%)

capture photos/videos of what you're experiencing, and share with friends/collaborators to see from your perspective in VR at any given moment



4

Interactive learning/skill development

(65%)

touch, get hands-on and interact with 3D subject matter spatially, learn by "doing" rather than "seeing" with augmented reality tutorials



5

Remove language barriers

(64%)

instant translation allows you to communicate with anyone, anywhere for immediate understanding

Q: How useful are the following features for working from home?

New addressable audiences are emerging for virtual solutions.

GEN Z

Gen Z values more **meaningful collaboration solutions** and is excited about the potential AR/VR presents.

40% Z

identify as users of both AR & VR.

The technology has a big base...they're just waiting for the experiences.¹

PROFESSIONALS SERVICES INDUSTRY

All industries are gearing up for new **virtual meeting spaces**, that allow for a sense of genuine connection and participation.

69%

of individuals working in professional services **are seeking out these solutions**. The most cutting-edge brands will anticipate these changing behaviors, pioneering new ways to engage customers and more effectively relate to one another in remote settings.

PARENTS, EDUCATION & HEALTHCARE INDUSTRIES

There is an opportunity to leverage demand for interactive learning for resonant experiences that **boost personal productivity**.

Parents, as well as education and health professionals, **are the most distracted** while working at home of all demographics. E-learning presents a sizable opportunity for all ages and industries: from families adjusting to school closures, to medical professionals continuing to practice important procedures from remote locations.

¹National Research Group - December 2019 - <https://www.nrgmr.com/news/me-and-the-machine>

MAKING A MEANINGFUL IMPACT ON SOCIETY

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

Q: Which of these technologies/innovations do you think can best reinforce positive trends you see coming out of the coronavirus pandemic?



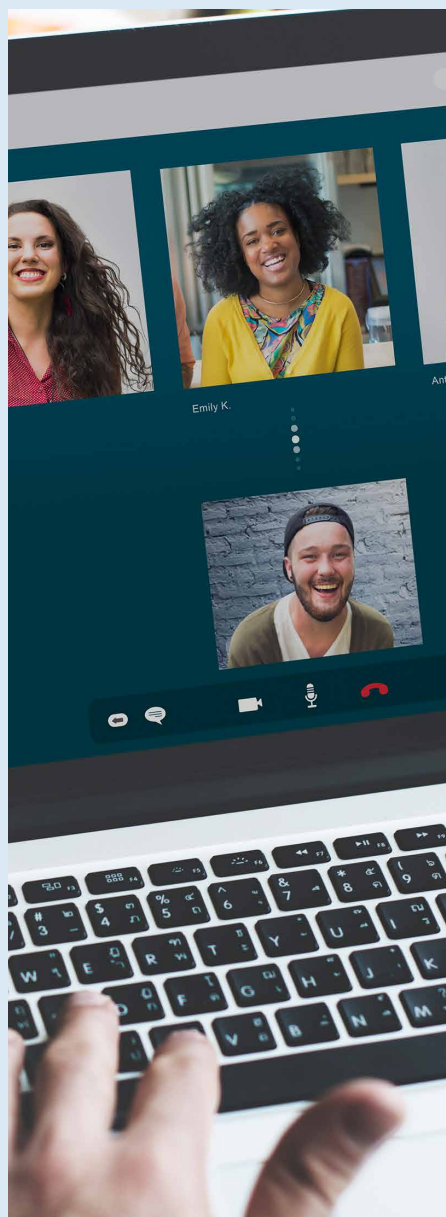
A more productive, efficient & informed society:

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



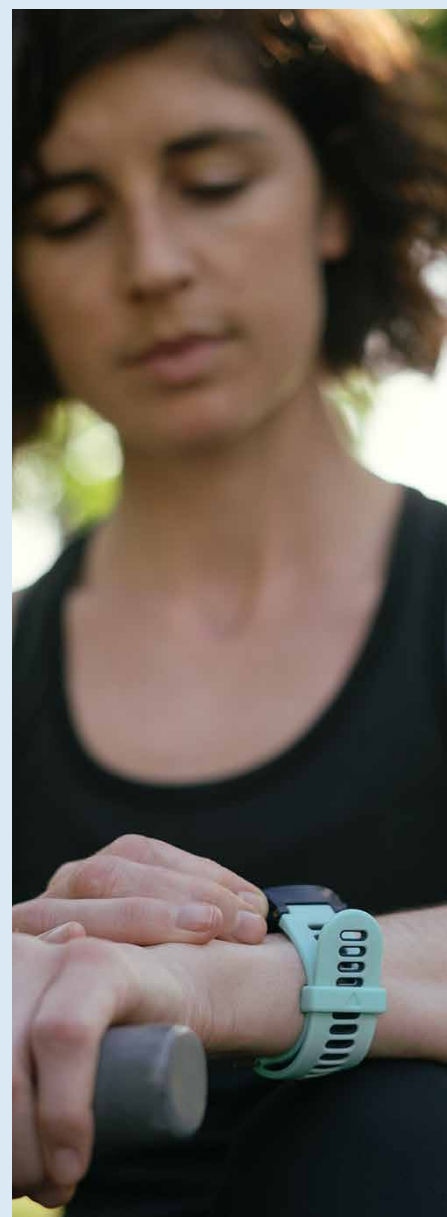
A more collaborative global workforce & connected social communities:

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



3 KEY TAKEAWAYS FOR CREATORS & DEVELOPERS

- 1 Solve for real pain points across key demographics, and ladder up to messages that matter
- 2 Develop for the long-haul: the longer this situation lasts, the more pervasive effective solutions will be

- 3 Maintain trust & build awareness through a clear, consistent business presence that offers transparency in the face of insecurity

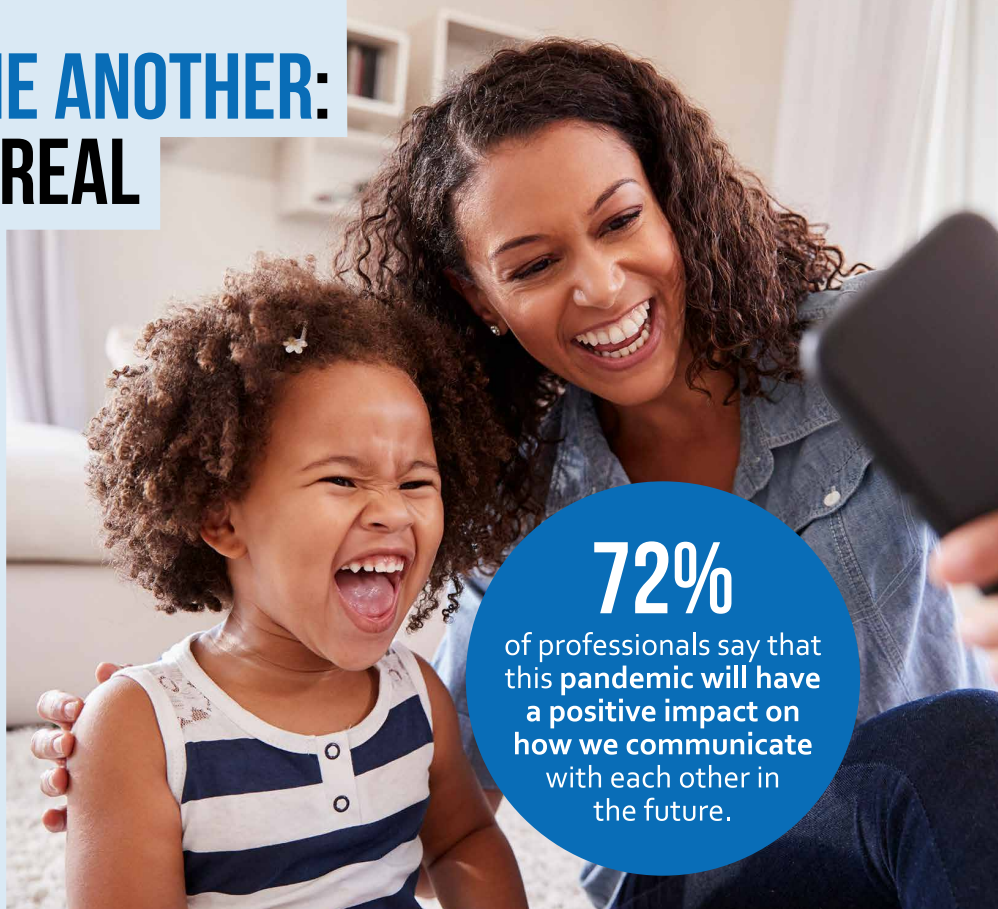
HOW WE SUPPORT ONE ANOTHER: FROM INVINCIBLE TO REAL

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.

AUTHENTICITY

When business calls become gatherings of donuts and alpacas a la Snap filters—think of the viral video of someone's boss accidentally transformed into a spud—work is inviting in play and self-expression. Come as you are, play as you want.

FREEDOM

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**

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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.

www.nationalresearchgroup.com | Los Angeles x San Francisco x Seattle x New York x London x Singapore

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