

COVID-19's Ripple Effect:

Digging Deeper

May 18, 2020



COVID is changing everything.

To be written.

As strategists, all we can do is read. And research. We wanted to dig deeper.

Aware of our white collar quarantine privilege, we wanted to take a closer look between the experience of essential workers and nonessential workers.

An ongoing study.

Currently planned for 3 waves over 6 weeks.

Using DoubleTap - Doner's digital ethnography tool.

Through partnership with Spark Ideas.

Exec Summary (so far).

1. The experience of essential workers compared to nonessential workers is vastly different and tells the continuing story of privilege and income divide in America.
2. Regardless of working status, America's collective psyche is in a precarious state and we are deploying classic coping mechanisms. The lack of transitions and continued crisis of isolation could have lasting and generational impact.
3. The role of brand is even more important than ever before: Brands have an important role to play in soothing the fractured American psyche presently and in the coming months and years.

1. Comparing essential vs. nonessential worker experience

A Tale of Two Quarantines

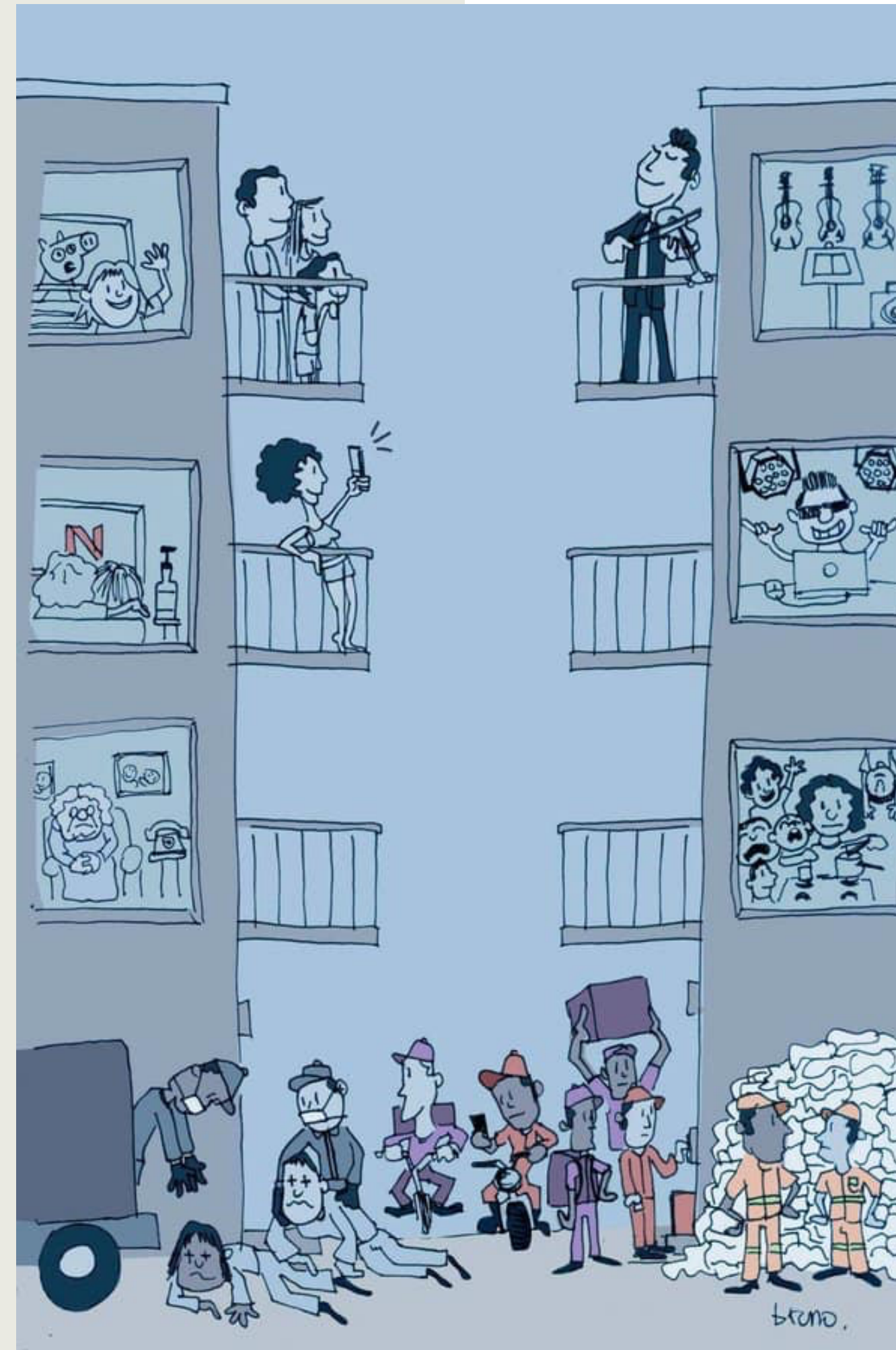
“The rich and the upper middle class have always had a plan:

Leave the city with the family, and if possible servants.

Work from home.

Do jigsaw puzzles and try to keep the kids from fighting or watching TV all day.

Bake bread and post it on Facebook.”



Bruno Lyda Saggese

“The working class has a very different plan, perhaps because the plan was made for them.

Find someone to watch the kids.

Ride the crowded train or bus.

Worry when someone coughs at work, where there’s not enough hand sanitizer.

Do the same thing in reverse. Repeat.

Maybe these are the lucky ones, compared with the ones who can easily self-quarantine because they have lost their small businesses and jobs and are worried about paying the rent.”

SOURCE: The [Guardian](#)

Facing Fears: Life vs Livelihood

Essentials: Fear is the now

Essential workers are consumed by providing life's bare necessities: food, work, health. And their safety concerns are life-threatening; for self and their loved ones around them.

They cannot escape the burden of fear.

89%

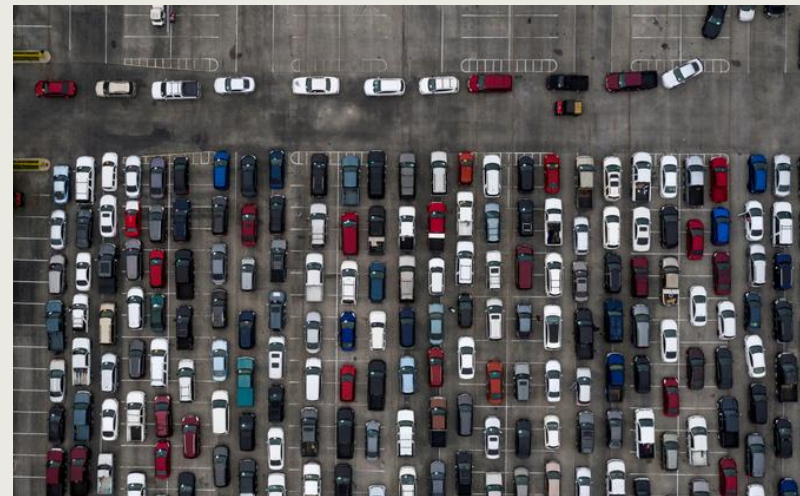
Americans on the front line worry they will expose themselves and their families to the coronavirus

SOURCE: NPR

My days during COVID? Stressful. I look at all the people standing in food pantry lines who are out of work, or who don't have food to feed their children. It makes me very sad. I give half my check to United Way. - UPS Warehouse Manager

Working around thousands of people not knowing who is sick and who is not is one of the most challenging parts. - LA Police Officer

SOURCE: DONER PANEL



SOURCE: REUTERS



Doner.

Nonessentials: Fear is the future

Health and safety are of course top of mind, but anxiety centers around their livelihood, employment and economic fallout.

The "not knowing" is deeply disruptive.

The most challenging thing is not knowing "what the new normal" is or when it will be over... it's like we are in a holding pattern. This is affecting my business and family life. - Entrepreneur

The most challenging part has been losing my job. I'm applying to postings and networking all the time. But being scared for where my next paycheck is coming from is really stressful. -Furloughed Advertising Executive

SOURCE: DONER PANEL

54%

Worried about their finances as a results of COVID

SOURCE: Suzy Insights



Emotions Are High: Raw vs Numb

Essentials: Their role as martyr

They feel responsible to their families, employers and communities.

Society's expectations define who they are.



Banksy

Nonessentials: Their role is unclear

Work as they knew it has changed. And as it seeps into their homes, their "role" is blurred.

They are losing purpose, ego, identity.



SOURCE: Slate Magazine

I'm overwhelmed by the workload and protecting myself, family and patients. I'm angry that this virus has happened and changed everyone's life. - Nursing Home Nurse

Please don't call me a hero. I am being martyred against my will.- Jillian, nurse in Brooklyn

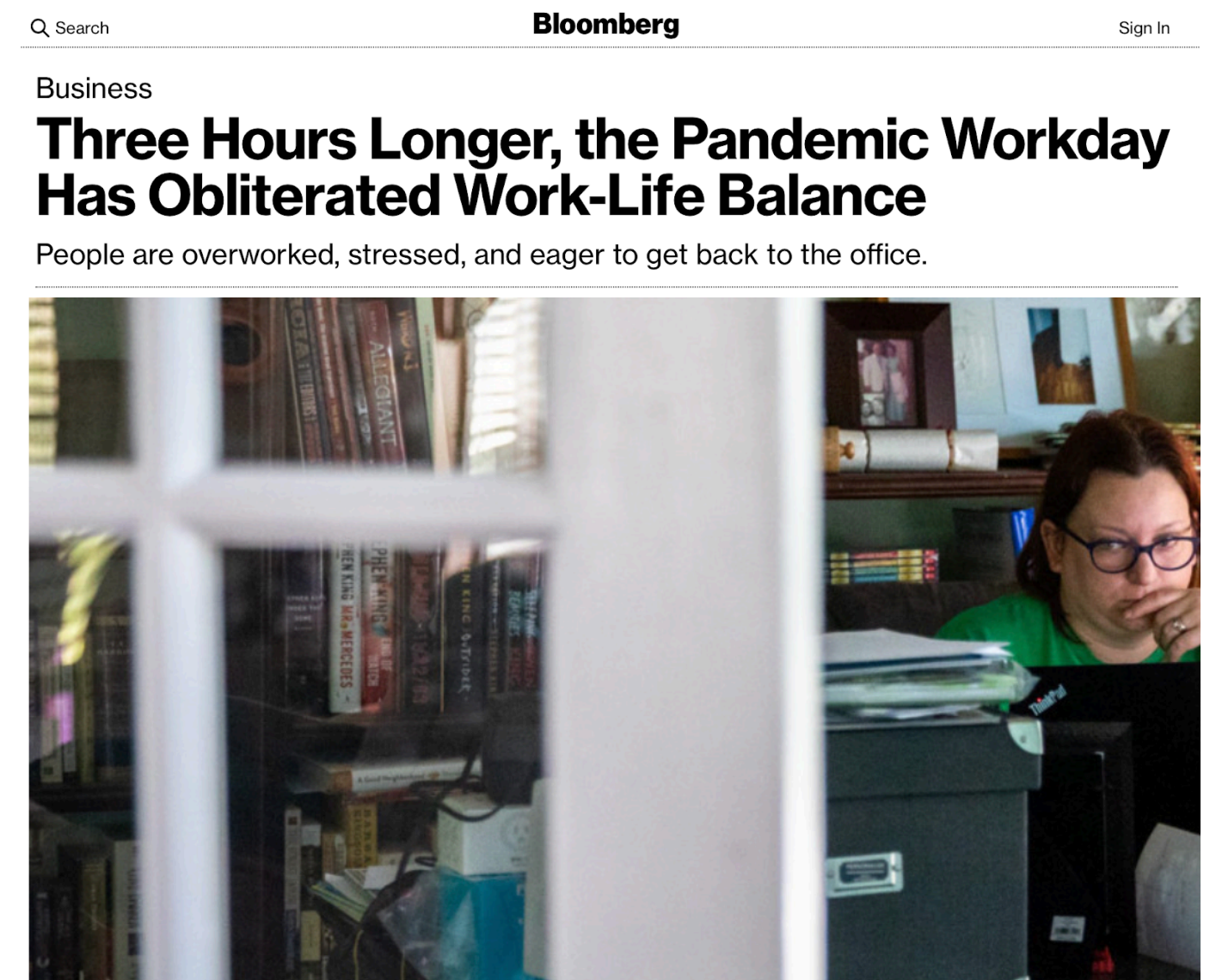
SOURCE: DONER PANEL

It's hard to separate work from my personal life. I am working from my bedroom. I have no barriers. Now it's merged together. - Accountant

SOURCE: DONER PANEL

Research has found that "role blurring" is associated with work-life conflicts. The "I have to remain available all the time" leads to higher anxiety and more sleepless nights.

SOURCE: The Print; April 8, 2020



Busier Than Ever: Doing vs Processing

Essentials: Taxed physically

While theoretically they can leave work at work, they bring fear home.

Their bodies are working harder while being emotionally challenged.



Lysol and Clorox are at-home staples



UPS team meeting discussing a new policy

This is how I exercise, by working at UPS... working longer, working harder. People helping people. - UPS Warehouse Manager

When we leave the house everyone must take off their shoes and leave them outside. We must shower right away and change our clothes. We are constantly washing our hands and sanitizing the door handles, cabinets, refrigerator and any common areas that we touch. - LA Police Officer

SOURCE: DONER PANEL

Nonessentials: Taxed emotionally

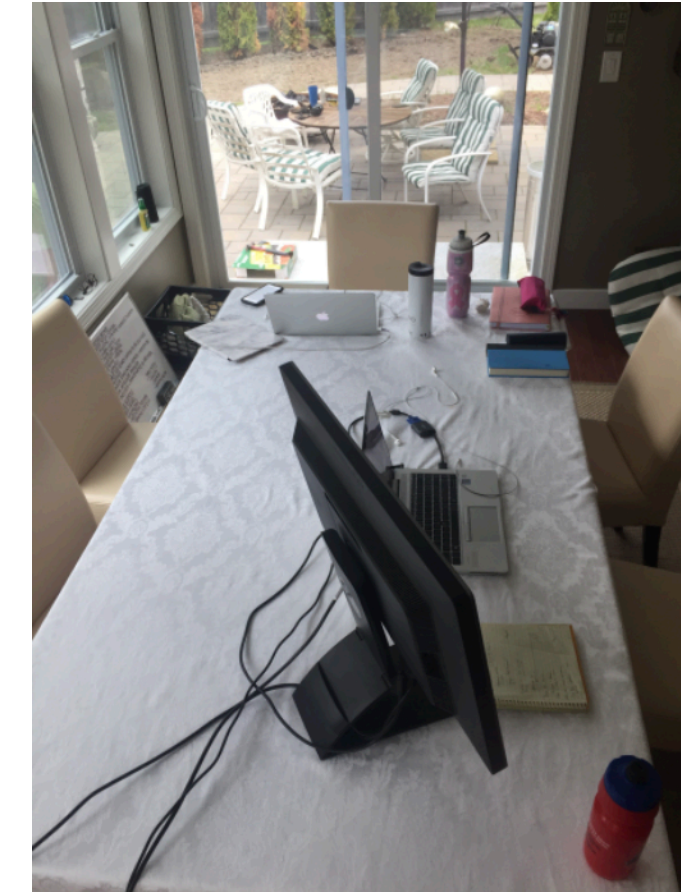
Working from home is a constant reminder of the fog and the numb.

It's hard to shut off the unknown repercussions on their lives and careers.

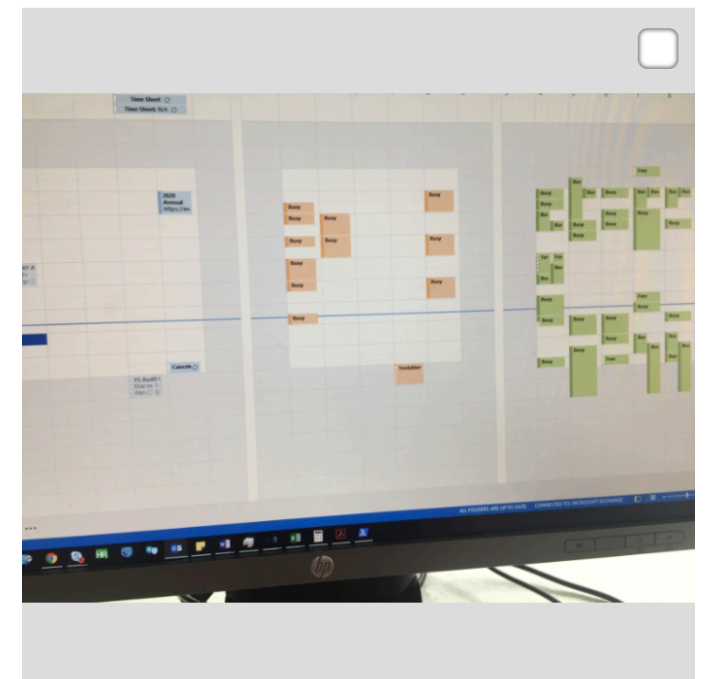
I feel more tired at the end of the day. My brain feels like it's working much harder... sorting for new connections and trying to make sense of how to move forward in a different world in all areas of work, family and life. - Point Reyes National Park

While physically I am comfortable working within the confines of my girlfriends' parents' home, mentally, there are constant "what if" scenarios. - Accountant

SOURCE: DONER PANEL



Home office + dining room, all in one



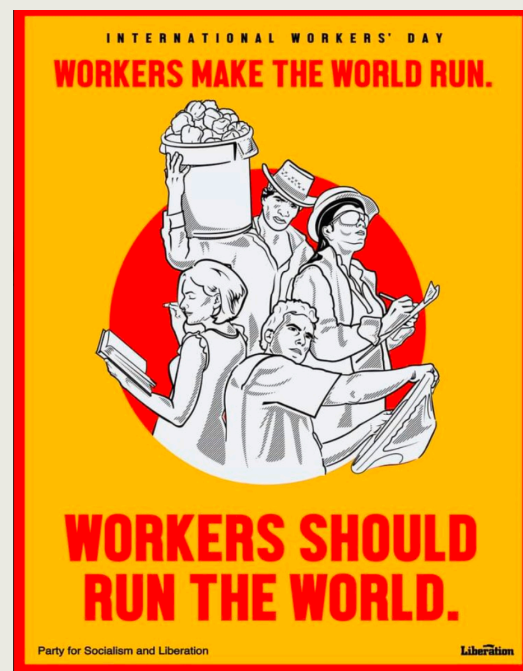
Back to back Zoom calls

Doing all they can: Actions vs words

Essentials: Doing for others

The “outsiders” don’t get how serious it is. It’s exhausting and frustrating. They feel put upon.

And their precautions are overt.



Their photos reveal the face behind the mask

Some people are super grateful and go above and beyond for us. Others respond by cursing our names. They don't understand or like having to wear masks or keep 6ft between each other. But I hear of at least one employee a week getting sick.

- Coscto Supervisor

Nonessentials: Thinking about others

They are thoughtful of close friends and acquaintances, but their hands are tied. Not much to do except reach out and clap at 7:00.

Their actions are symbolic.

I have taken more time out of my day to think about others in this situation. I genuinely started caring for the families of friends, people not so close to me, especially if they were more susceptible, as I know if I were in a similar position I'd want the same thoughtfulness.

- Accountant



7 PM applause



A silenced city erupts in cheers to honor those on the front lines

Perception is reality: duty vs privilege

Essentials: Burden of Others

From how they work to to who they see. How they eat to how they clean. **Every aspect of life is challenged.**

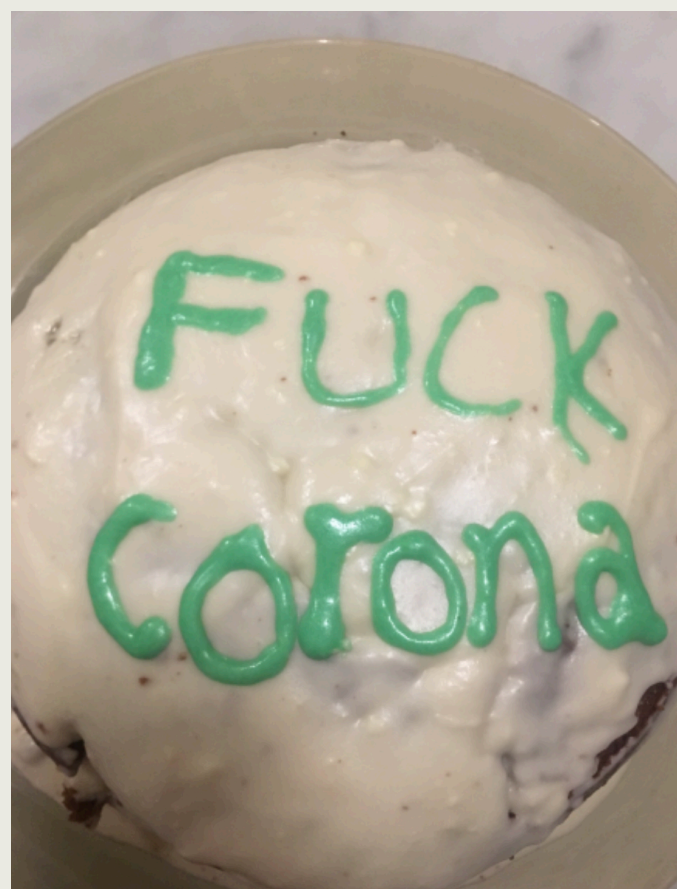
The sad thing is I do not see extended family. A lot of people are afraid of contracting it from me
- ER Admin

Number one thing is protecting family. Shoes and clothes off at door. All work clothes in a separate bag.
- LA Police Officer

My food supply has changed. I do not cook much. I started eating a lot of junk food. Snacks, cakes and pies. I have not been at the gym and my eating habits are off track. It may be the stress of COVID that just has me snacking. - Nursing Home Nurse



"I'm his family now"



Happy Sweet 16

Nonessentials: Unaware of privilege

While they are aware of the magnitude of the "hurt" around them, they are using this time to "heal"...

Enjoying the pause to imbue new meaning in life.

Walks, runs, biking in my neighborhood!! Feeling fairly good.

- Entrepreneur

I've been making dinner much more often and matching cocktails with the food.

- Accountant

I am starting to find balance now and am seeing more positives than negatives in this new non-consumption based world. The earth can breathe, people are staying close to home, carbon emissions are down, we are turning back to our families, cooking again and opening our eyes to what is right in front of us. - Point Reyes National Park



Caption TBD



Cigars with the guys... 6ft apart

Necessary Downtime: Pleasure vs Obligation

Essentials: Downtime is therapy

Living at a furious pace makes their downtime sacred. They are enjoying it more, doing creative things.

With no real structure, they are feeding the soul.



Making time for fun



Sand on the toes, sun on the face

No routine. I feel like that's actually helped me mentally just relax
- ER Admin

I am a police officer. I need downtime. I love to go in my backyard, lay in my hammock and either read a book or just lie quietly and clear my mind.
- ER Admin



My reading room

Doner.

SOURCE: DONER PANEL

Nonessentials: Downtime is task time

They are a bit more regimented and have created a routine that they stick to. This allows them to get more done and feel more accomplished.

Parameters reassure them they are doing enough.

Lately my husband and I have been working on projects around the house so you'll notice the laundry room looks pretty clean, which we just updated. - Furloughed Advertising Exec

A new hobby is more housework. I installed the barn door behind me...a task that I had been avoiding. The loft requires lots of improvements including shower, bedroom and closet. - Entrepreneur



Bathroom overhaul



Caption Daily practice

SOURCE: DONER PANEL

2. The American psyche and current coping mechanisms

Mental health consequences are starting to manifest

19% Adults experiencing increased panic (spiking in Gen-Z at 29%)

41% Adults experiencing increased anxiety

50% Women say their mental health has been negatively impacted. (40% men)

24% Adults experiencing increased depression

Source: [Global Web Index](#)

Doner.

History isn't kind

Suicide rates rose significantly during the Great Recession. "North America and Europe together experienced roughly 10,000 more suicides during the severe downturn than the trend from earlier years predicted"

Source: [NPR](#)

A study in China showed that during the initial phase of the outbreak over 50% of adults rated the psychological impact as moderate-to-severe, and about one-third reported moderate-to-severe anxiety.

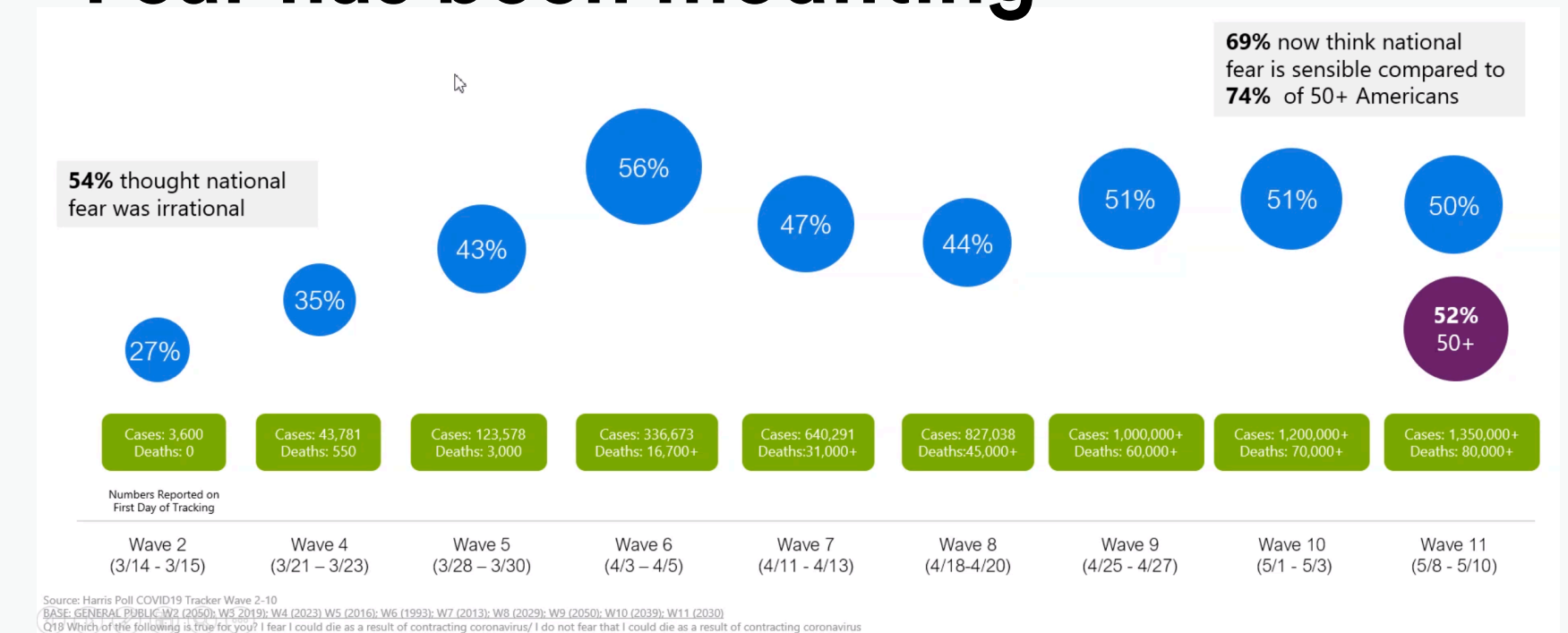
Source: [Psychiatria Danubina, 2020](#)

Testing the system's limits

"Nationwide, crisis services are trying to deal with the immediate aftermath. But the country's weak mental health system may not be able to meet rising demand."

Source: [The Gaurdian](#)

Fear has been mounting



Source: Harris Poll

40%

Increase in messages to global SMS helpline for teen

+1/3

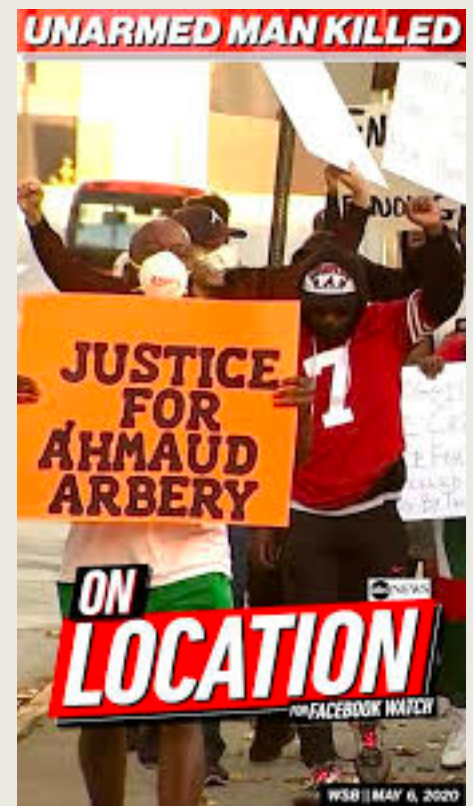
Requests for help from domestic violence victims

It's a particularly difficult time psychologically for people of color

Murder Hornets



Vs. getting murdered



Black people don't get to wear menacing masks or flash handguns on courthouse steps

"As a white man watching the Michigan protests of Governor Gretchen Whitmer's stay-at-home orders, all I could think was: Black people don't get to do this. Muslims don't get to do this. Latinos don't get to do this. People who don't look like this don't get to do this."

Black-owned businesses less connected to resources

"Some business owners may never recover from this pandemic and may remain closed forever. This has taken a toll on so many lives that it breaks my heart to hear about people dying, losing jobs and some are even facing evictions, which will add to the nation's homeless population."

- Ericka, African American Essential Worker

Black people are so tired. 😞

We can't go jogging (#AhmaudArbery).

We can't relax in the comfort of our own homes (#BothemSean and #AtatianaJefferson).

We can't ask for help after being in a car crash (#JonathanFerrell and #RenishaMcBride).

We can't have a cellphone (#StephonClark).

We can't leave a party to get to safety (#JordanEdwards).

We can't play loud music (#JordanDavis).

We can't sell CD's (#AltonSterling).

We can't sleep (#AiyanaJones)

We can't walk from the corner store (#MikeBrown).

We can't play cops and robbers (#TamirRice).

We can't go to church (#Charleston9).

We can't walk home with Skittles (#TrayvonMartin).

We can't hold a hair brush while leaving our own bachelor party (#SeanBell).

We can't party on New Years (#OscarGrant).

We can't get a normal traffic ticket (#SandraBland).

We can't lawfully carry a weapon (#PhilandoCastile).

We can't break down on a public road with car problems (#CoreyJones).

We can't shop at Walmart (#JohnCrawford).

We can't have a disabled vehicle (#TerrenceCrutcher).

We can't read a book in our own car (#KeithScott).

We can't be a 10yr old walking with our grandfather (#CliffordGlover).

We can't decorate for a party (#ClaudeReese).

We can't ask a cop a question (#RandyEvans).

We can't cash our check in peace (#YvonneSmallwood).

We can't take out our wallet (#AmadouDiallo).

We can't run (#WalterScott).

We can't breathe (#EricGarner).

We can't live (#FreddieGray).

We're tired.

Tired of making hashtags.

Tired of trying to convince you that our #BlackLivesMatter too.

Tired of dying.

Tired.

Tired.

Tired.

So very tired.

(I don't know who created this. Copy and paste.)

For all, stressful disruptions abound

Financial realities

With many Americans living paycheck to paycheck, defaults are skyrocketing. Unemployment is at historic highs. 1/3 of Americans didn't pay rent last month. We don't know how bad it will get.



Living virtually

Our brains process information more efficiently thru person-to-person contact. So, constantly trying to connect via videoconference is exhausting. Plus we're not used to looking at ourselves that much and the constant feedback loop can be overwhelming.

Bending of time

And when I look back on my last week or the week before that, I honestly probably couldn't tell you exactly what we were doing. This all feels like a bizarre dream. Like the twilight zone. - Taylor, Nonessential Worker

This is pretty scary times and makes the days seem all the same. I have to constantly check to see what day it is. This is very scary and sad times. - Ericka

I have noticed a dip in concentration throughout the day. It may be from a multitude of factors: the nicer weather, the longer hours and the same office space - Kyle, Nonessential Worker

Each day has blurred into another and the only reason I'm able to stay connected is because of the sales plan at work each day. When I have had multiple days off in a row I find myself having no idea what day it is and even confusing the months. I have to constantly check my online schedule to make sure I don't get my days mixed up.

- Daniel, Essential Worker

Time is moving faster because we are all doing the same thing.

- Matthew, Essential Worker



The level of disruption our lives are experiencing is unparalleled, creating high levels of tension.

Emotions we're all feeling



We're all grieving

The U.S. is still averaging about 1,000 COVID-19 deaths a day, which is roughly two Sept. 11 attacks every week.

"We're all in the same boat. Or at least, we're all in boats. Some are bigger, some are smaller."

Source: NY Times

Processing sadness

My mom, she actually got the virus so she had it. Wasn't doing so good for days and weeks. I'm thinking like, please, nothing happen to her because on the news you see that most people are dying from it. There's people I know who have family members who've passed away from the virus.

- Detroit Teen

"The first few weeks honestly, I was depressed. I was really sad. I would just have moments where I would just cry."

- Detroit Teen

Source: Doner Panel



10-year-old creates plastic curtain to be able to hug grandparents

abc 7
Tuesday, May 12, 2020 10:20AM

LINSAY OKRAY/FACEBOOK

CORONAVIRUS EMERGENCY RIVERSIDE
10-YEAR-OLD INVENTS HUG CURTAIN
abc 7

00:45 01:32

EMBED < MORE VIDEOS >

Physical contact with loved ones can be difficult during the coronavirus crisis, but that didn't stop a Riverside girl from coming up with a way to hug her grandparents.

Solitude begets loneliness

“Humans have this dire need to connect. Our brains have learned from brutal evolutionary lessons that social isolation is a death sentence.”

We’re craving human touch

Just under 30% of American’s live alone. And in social distancing days, human contact is limited to members of the same household, denying many the natural cuddle hormone, oxytocin. In the way newborn infants need skin-to-skin contact, we all need touch to bond and feel human.

Even before the COVID-19 pandemic, public-health experts were concerned about an epidemic of loneliness in the U.S.

The share of American households with just one person has been rising for the last 50 years

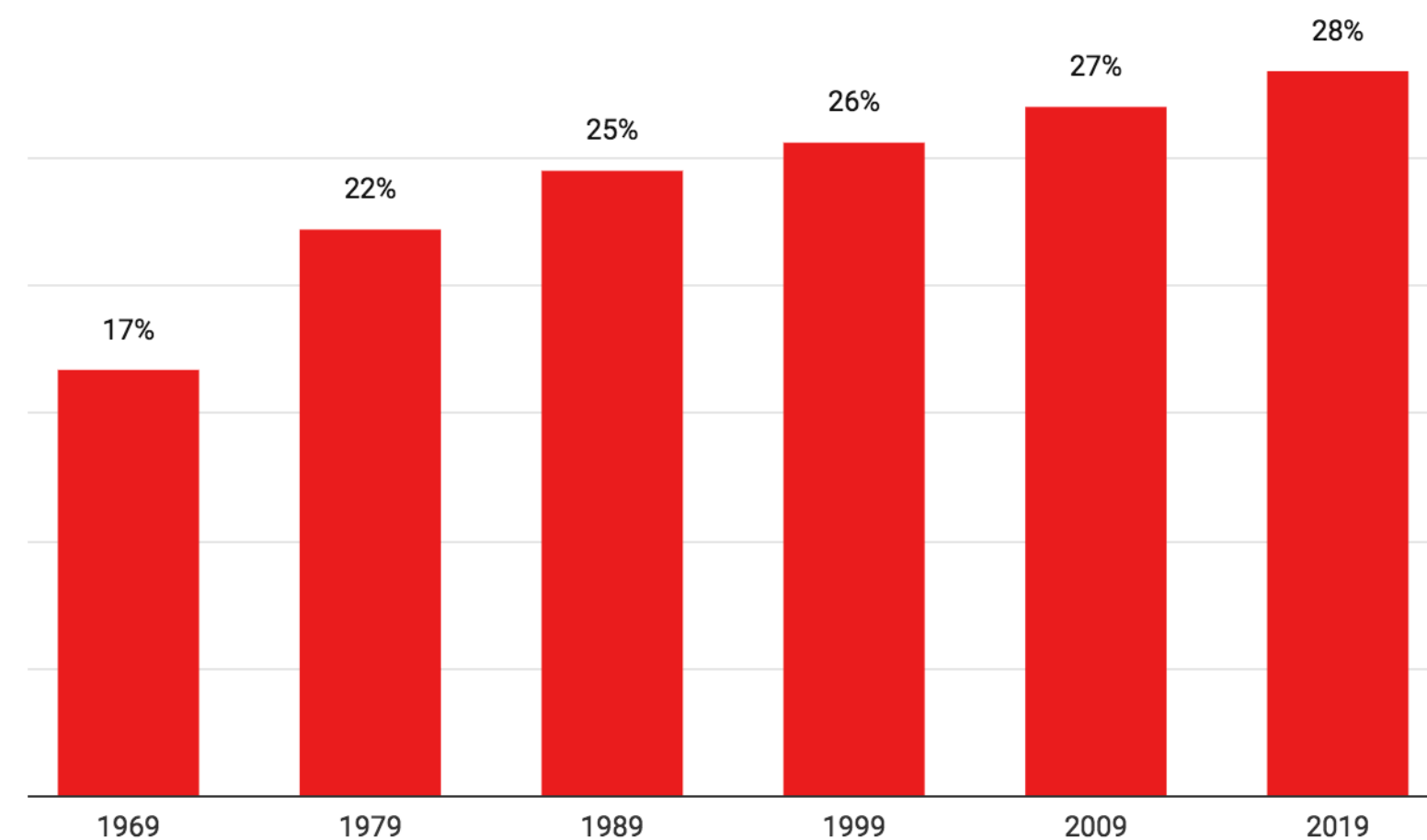


Chart: Emily Barone/Elijah Wolfson for TIME • Source: U.S. Census Bureau • Get the data • Created with Datawrapper

The Dutch have developed a word for skin-hunger: **huidhonger**.



Loneliness leads to...

“Chronic loneliness has clear links to an array of health problems, including dementia, depression, anxiety, self-harm, heart conditions and substance abuse. The health consequences of loneliness are often likened to the effects of smoking 15 cigarettes a day”

SOURCE: Time

Lost rites of passage cut deep

Every culture celebrates moments of transition and those significant milestones aren't being replaced or fulfilled.

Lack of transitions

In the COVID world, milestones happen without fanfare - no baby showers or retirement parties. Funerals can't happen at least not the way we want them to. Weddings are postponed indefinitely. Seniors won't get to walk. Prom was canceled. First dates are on hold. Forget about first kisses.

What we're missing

I feel like it took away all the things I've been waiting for my whole life. Detroit teen

I just became a grandmother. Not seeing my granddaughter. My daughter expecting a child as well. Not being there. - Lori, Essential Worker

I miss celebrating. Life is about celebrations. At least for me. That's what I look forward to. I can't wait to celebrate engagements, babies, graduations, birthdays, holidays and milestones. I thrive on positivity and building one another up. - Taylor, Nonessential Worker

I feel really sad. I didn't think my daughter was going to have children so when she told me she was pregnant I was ecstatic! I was so excited to plan her baby shower for her firstborn and then COVID 19 happened. - Ericka



SOURCE: Visit New Orleans



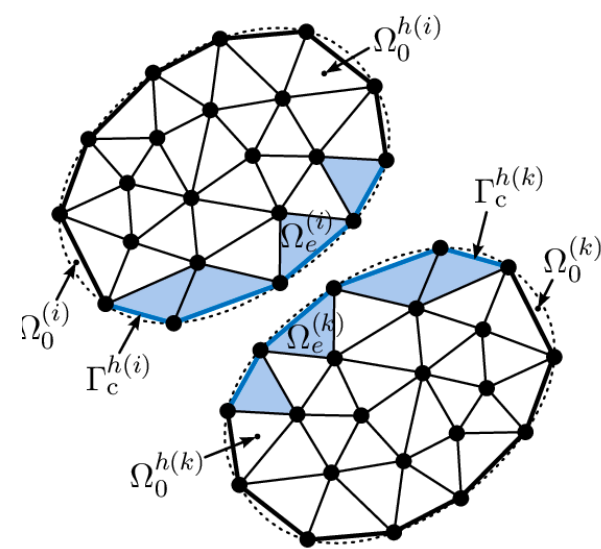
The “not knowing” is unsettling



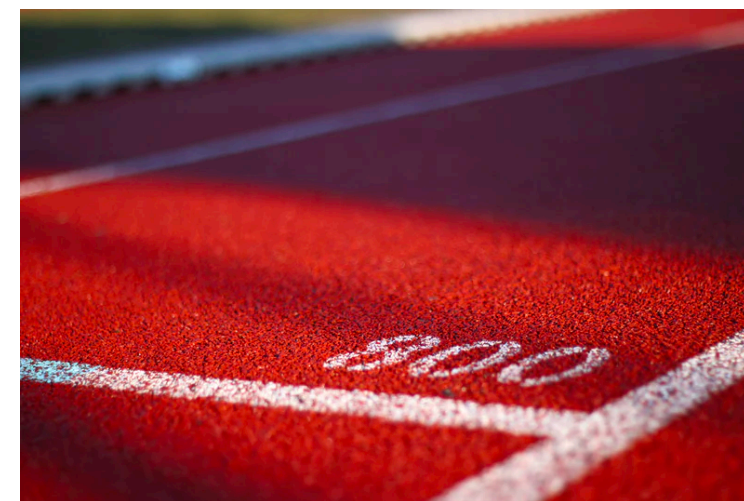
Unprecedented uncertainty

We have no idea when this will end. We’re running a race with no clue how far in we are. And none of us have done this before. It’s everyone’s first global quarantine.

I have no idea when life will go back to normal so that is giving me stress and anxiety. - Steven, Nonessential Worker



*“In math it’s called discretizing the continuous.”
(Divide things into measurable sections in order to tackle them.)*



“Halfway through my run it gets easier. But there’s no halfway point here.”

Why uncertainty is painful

What’s the impact of uncertainty? In one study, respondents were told they either a) were definitely getting a shock b) were definitely NOT getting a shock or c) 50/50 shot either way. Option c caused the most anxiety. Now knowing is the worst. “The brain has “an insatiable craving for certainty.”

SOURCE: [Psychology Today](#)

Lockdowns also cause uncertainty to remain high, as the extent of the structural damage to the economy becomes less predictable the longer lockdowns stay in place. This uncertainty is paralyzing.

SOURCE: [McKinsey](#)

The inability to discern an end reduces our sense of control — “our sense of agency.” Endings allow us to think about transition; to think about the next phase, the next era according to Calvin Morrill, a professor of law and sociology at the University of California, Berkeley.

SOURCE: [NY Times](#)

Defense mechanisms at play

In order to achieve balance, U.S. adults are deploying a variety of subconscious defense mechanisms, which are all very understandable. A few examples...

Compensation

#inittogether, #healthcareheroes

Denial

“It hasn’t been that long.”

Displacement

“The dogs are tired of hearing about it.”

Projection

“My little brother is driving me crazy.”

“The kids have turned on each other.”



Reaction Formation

“I always wanted to be a hermit!”

Regression

“Ooh these biscuits!” (nostalgia brand)

“How good do McD french fries sound?”

Ritual

Distance Dance anybody? Rhythmic, repetitive movement (body and/or hands) is said to calm anxiety.

Sublimation

“I have my knitting and my husband.”

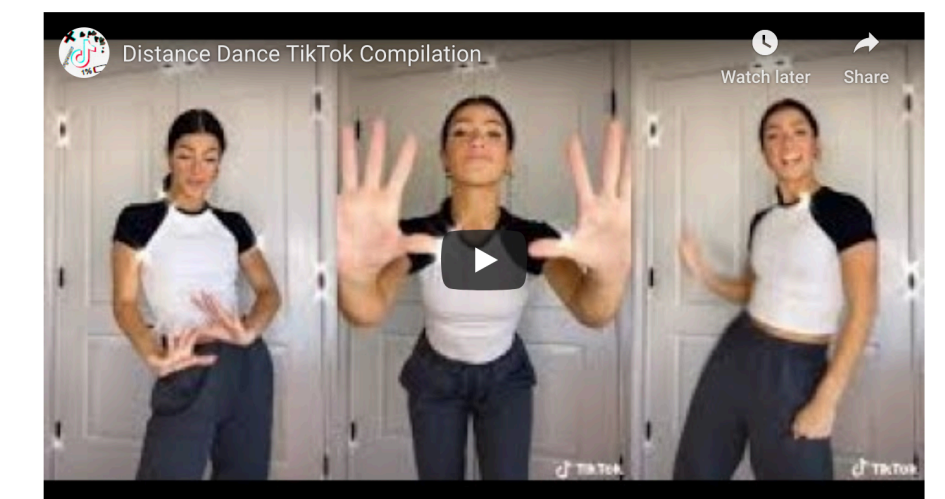
“A great time for gardening”

12 Defense Mechanisms: Sigmund Freud	
1	Compensation: Strengthen one to hide another.
2	Denial: Refuse to face a negative behavior.
3	Displacement: Take it out on someone else.
4	Identification: Attach to something positive.
5	Introjection: Conform feelings for approval.
6	Projection: See your faults & foibles in others.
7	Rationalization: Excuse and justify mistakes.
8	Reaction Formation: Pretend you are different.
9	Regression: Act much younger to feel better.
10	Repression: Putting things into darkness.
11	Ritual & Undoing: Override negative with habit.
12	Sublimation: Divert negative into acceptable.

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P&G teams up with TikTok It Girl for the Distance Dance campaign

By Eliza Jane - April 8, 2020



Ways we're coping

Exerting control

Many of us are looking for ways to maintain a sense of control in these chaotic times. For some respondents that includes dramatic shifts (stepped up!) in cleaning routines.

Many households are finding new exercise routines, new meal schedules, new ways of navigating the physical space of the house. All of these give mental comfort through structure.

19% Started using a meditation app

38% Started watching recorded exercise videos

"We eat breakfast together every day. I hope it keeps up after this is over."

"I work from the bedroom, my husband works downstairs, and the kids keep the kitchen/LR space. Everyone has a corner."

"My wife does a full clean every two days."

"I might never leave the house again and I'm OK with it. I'm 78, immune compromised. I've got my knitting and my husband. This feels comfortable."

Doner.

SOURCE: DONER PANEL



Exerting control

Some people in pain have no choice but to try and cause pain and this pandemic is showing that to be true with an outbreak of "jerk-like" behavior. We expect to see this mounting as tensions continue to rise.

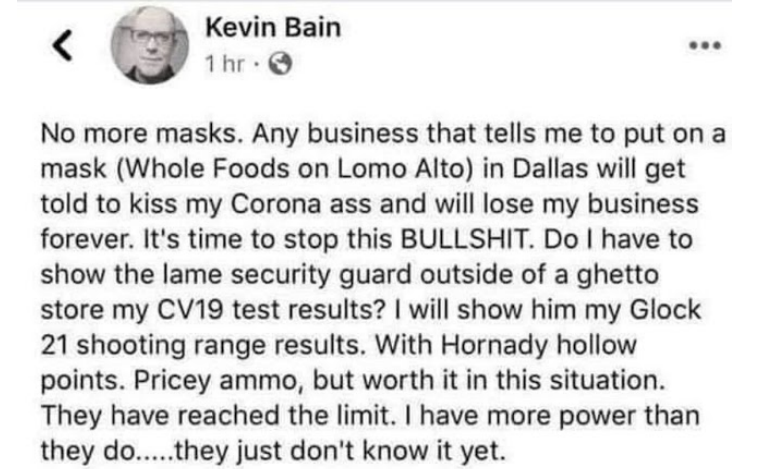


"I feel like people in my community, they're not really taking it serious for real. A lot of people are going to their friends house."

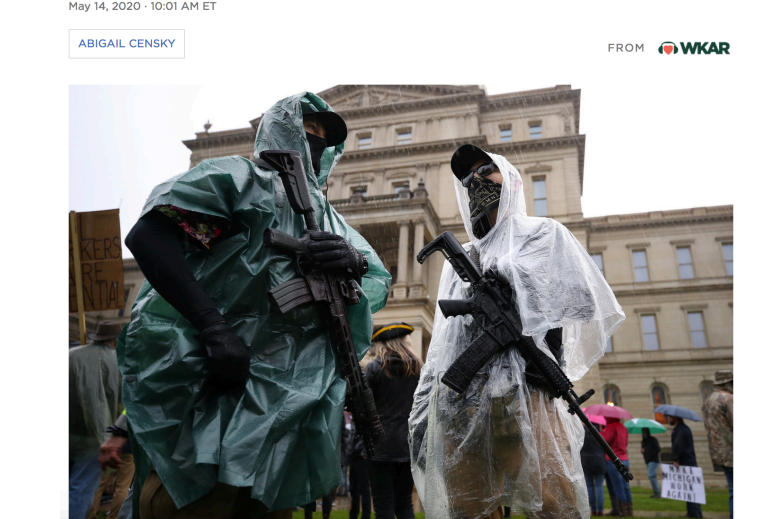
"A lot of people are just hanging out together. They have like a big groups of friends' together, it was like eight people, driving around in their car, doing a bunch of stuff. I'm like, what about quarantine?"

"Tensions are building in our home. If the kids aren't fighting, the dog is biting its tail."

SOURCE: DONER PANEL



Heavily Armed Protesters Gather Again At Michigan Capitol To Decry Stay-At-Home Order



Ways we're coping

Old habits, comforts



People are turning to puzzles, Pokémon and Club Penguin, perhaps looking for some old school joy.

It's also happening with relationships. Single friends will tell you they have heard from every ex, every "one that got away," even the ones that ended badly.

Favorite "classic" food brands are spiking as well. Campbell's soup sales are 59% YOY. Ragú pasta sauce +52%. Who wouldn't enjoy some classic Mac and Cheese right now?

Viral nostalgia-fueled photo trends like #MeAt20 and #ImJustAKid ask people to share snapshots from their pasts.



"I watch 3 reruns of Drag Race a day. It's my sanity."

"Going over old memories and reflecting has helped me not be in a funk while this goes on."

"I went through some old photo albums the other day. It" just not the same now that pictures are only digital."

New intentionality

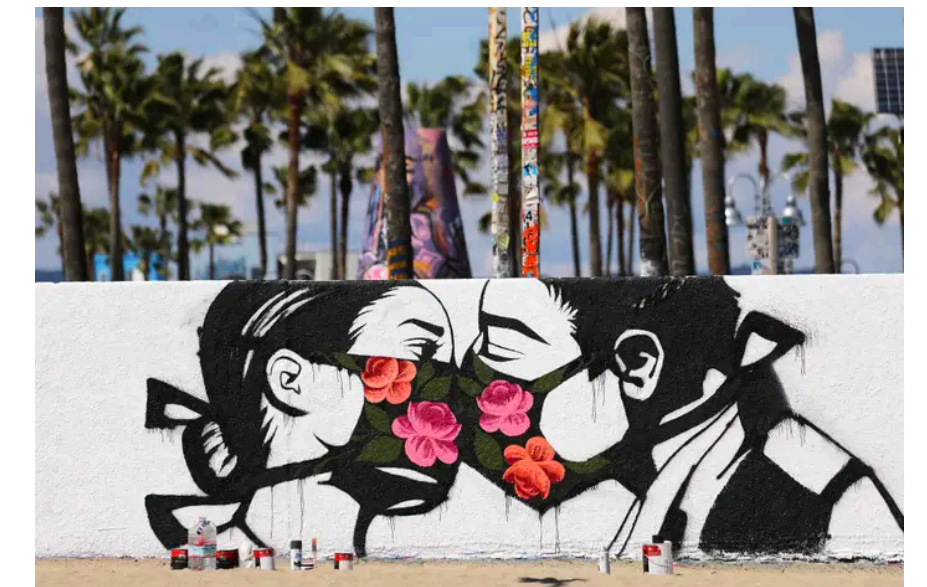
As everything is heightened, everything is extra, many of us are focused on staying positive and have an increased focus on "what matters."

One example is the phrase "How are you?" which used to be filler conversation. Ask someone how they are today and you're likely to get a thoughtful, earnest answer.

19% Adults experiencing increased compassion

18% Adults experiencing increased gratitude

Source: Global Web Index



"I do not have time for negativity."

"I am also constantly reminding myself of how blessed I am that everyone is doing well. I always try to change my sad/negative thoughts into thoughts of gratitude." - Ericka

"I just made a point to check in on people a little bit. Not even necessarily people I was close with but people I associated with. I was like hey, 'how are you doing?' And I think it came from a place knowing, oh, I'm struggling, is someone else struggling? Let's see if they need someone to talk to."

Ways we're coping

Staying healthy

Some adults are using this time to find new ways to get exercise. Many adults are incorporating daily walks. There is a heightened focus on prevention and immunity that will likely continue for some time.

For essential workers, because they feel exposed to the virus on a daily basis, the need to protect the health of their families is paramount. So, the measures they are taking to stay healthy are more proactive and involved. They're willing to try anything.

Another thing that I have been doing is taking my vitamins daily... I just believe that every woman young, middle age and older should be taking prenats. They are loaded with tons of different vitamins that every woman needs. I take them as a multivitamin.

- Taylor

I take the orange peels, mix that in some hot water, add ground cinnamon, some garlic with sea salt. Let that boil for about 10 to 15 minutes and I inhale the fumes for as long as I can take it.

Inhaling the fumes with all of these ingredients eliminates bacteria in nose and mouth. The garlic and sea salt taste weird at first. It gets the job done

- Matt

45% Exercising more in the last month

SOURCE: Harris Poll

SOURCE: DONER PANEL

Doner.

Indulging in everything

Facebook usage has surged in every country affected by COVID-19 by a reported 50%. We're drinking more, and earlier. Weed sales are strong. We're eating more processed foods. Pretzel sales are up 47%. Goldfish crackers up 23%.

Parents find it easier to say yes to an unhealthy snack request given the emotional turmoil we're all in. Food makes us feel better. We've been taught that our whole lives.

"Def splurging on food now. Good omelet in morning in my new maker, no lunch, veggies and protein dinner...then snacks late night before bed...and after drinks...wosaaa. Late night snacks are always fun, you know that!"

- Talib - Nonessential Worker

"My clients supply requests have increased 30%."

- Legal marijuana grower

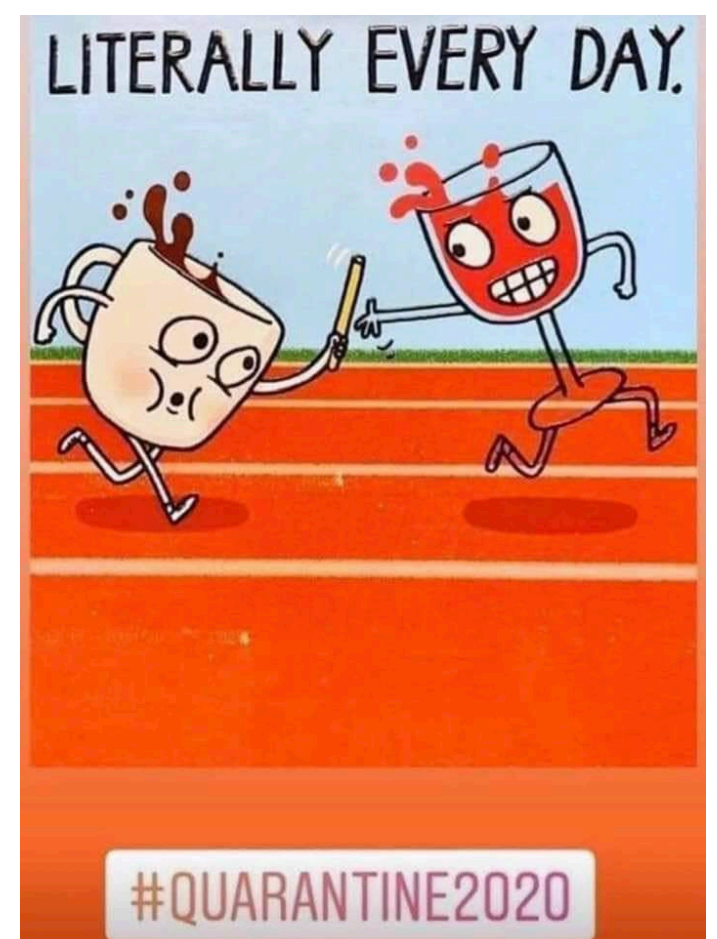
"This is Whiskey (4:30 Zoommeeting)."

Un-named co-worker

SOURCE: DONER PANEL



SOURCE: NY TIMES



3. The role of brand today and tomorrow

Brands winning today



Cleaning brands

Many respondents, when asked about brands resonating with them today, started with cleaning brands. Lysol and Clorox were frequently mentioned. Anecdotally, we've heard a swift turn away from naturally based, chemical free cleaning-products. We've all seen those shelves still full.

SOURCE: DONER PANEL



Immunity

Massive government and media publicity around the coronavirus have created what is effectively the world biggest ever advertising campaign, where the key message is 'You're vulnerable'.

Hence new peaks in demand for hand sanitizers, antibacterial cleaning sprays and food supplements. But also in other, associated categories, such as fermented foods, dairy and non-dairy immunity shots, juices high in vitamin C, herbal tonics and teas.

SOURCE: WARC

simplify.

Make my life easier

Consumers have great affection for brands and products that make life easier, less stressful, more streamlined. Roomba is a bright spot for one household. Voice command in a hyper hand-washing world was the thing we didn't know we needed.

Also, brands that span a wide variety of household needs, such as Kirklands carry extra significance.

Brands winning today (cont'd)



Nostalgia brands

Brands that remind us of home or our childhoods are particularly resonant these days. One ex-pat respondent “OOOOH!”-ed with joy at seeing his favorite UK brand in the pantry. Encountering litter on a recent walk had one respondent upset, not about the litter, but at how good Chick-fil-A sounded.

SOURCE: DONER PANEL



Tech and connectivity

Top of mind is staying connected, so no surprise that brands like Zoom and Amazon are winning with consumers.

37% Feel more positively about technology companies



Home improvement and designing my space

Stuck at home, families are rethinking space and planning for a different future. On Pinterest, people are engaging with their own boards 70% more vs last year.

22% More than one in five (22%) say “being home so much sparked my interest in renovating my home.”

Source: Harris Poll

Brands that will win tomorrow



Barbershops and salons

Who knew that what most people would miss was a simple haircut? It turns out, our beauty rituals are also communal rituals and people can't wait to get back to them

Yes, I totally miss the liberties and freedoms of going shopping and going to spas and going to hair salons to get beautified! - Ericka



Financial planning

No surprise but everyone wants to think differently about their families financial future.

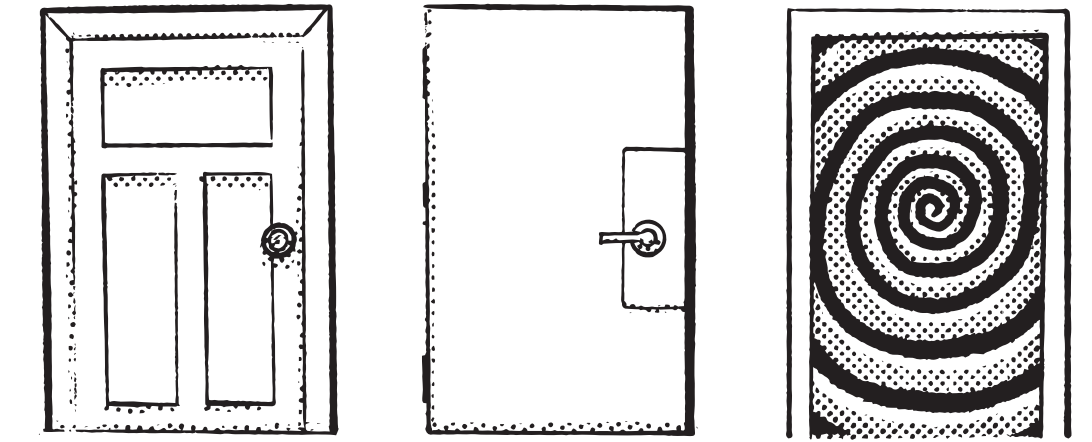
Harris Poll showed that nearly 6 in 10 Americans (59%) say that once things return to normal and businesses reopen they would keep more money in savings to prepare for something like this in the future.



Return of the chain

As mom-and-pop restaurants struggle, big chain restaurants have fared well comparatively. \$3 out of every \$4 being spent on dining out is being spent at a chain. Will foodie culture in cities struggle and for how long?

Brands that will win tomorrow cont'd.



Earth

We're expecting increased demand for CSAs and farmers markets should be able to open - Eastern Market in Detroit never closed. With city dwellers considering flight, there will be new draw to rural areas.

27% Have considered moving to a less densely populated area

39% Of urban dwellers have considered moving to a less densely populated area

Home delivery

Now that we buy groceries online, there is plenty of reason to expect that to continue. Watch for smart CPG companies to partner with Loop as they go national with their reusable packaging + home delivery model.

52% Expect to spend less time in-store shopping

Fun and joy

There is an enormous, collective pent-up demand for fun. Expect bars to be flooded as soon as it's allowed.

For now, pockets of joy are found at home through music, through movie nights and board games. And every possible outdoor plaything (trampolines, aboveground pools, play sets) is sold out.

25% Want to splurge on their kids

43% Feel bad for the emotional toll crisis is taking on their kids

What's next?

The White House Commemorative COVID coin claims victory but the road ahead seems uncertain for most of us. We'll continue to monitor consumer sentiment to help brands get their messaging right.

Wave 2 of our study is currently in field and we'll continue to look at how brands can be most impactful now and in the future.

Let us know if you have questions our panel can help answer.

Please contact your Brand Leader or Craig Conrad (cconrad@doner.com).



Thank you.

Doner.