

The KANTAR logo is displayed in a bold, white, sans-serif font against a dark background.

GLOBAL QUALITATIVE  
COVID-19 DEEP DIVE  
REIMAGINING THE  
FUTURE



## IAB SA / Kantar's Insights in Action, Session 11

### Life now and beyond COVID-19 – re-imagining the future

**Brand architects are in an interesting socially distanced space post-lockdown yet pre-vaccine, where we need to reimagine reality. As consumers, our sense of 'normal' has shifted over the past few months, so much so that many have had to learn to undo a lifetime of habit and replace them new behaviours, fast. Kantar's global qualitative study across 13 markets including Africa offers a comprehensive, multifaceted starting point to unpack these, as an exploration of what it means to be human at this extraordinary point in world history, especially when coupled with findings from the latest waves of our C-19 Barometer study. These reveal hidden tensions while unpacking the specific challenges consumers face, with a cultural lens of their evolving needs.**

A key insight is the need for **authentic empathy**, as consumers are tired of brands taking to them in a way that doesn't speak to their current reality. To speak to consumers with authenticity and empathy, you need to take perspective and immerse yourself in the changed nature of everyday life.

Before the pandemic, many felt they were spending too much time on social media. Today, the digital realm plays a powerful role as we are largely physically isolated from our communities, with the elderly showing interest in learning to do things differently through technology. Another big change is that our homes have had to be reimagined as our offices, entertainment centres, gyms and even schools. At no other time in history have we seen the convergence of work, childcare, school, socialising, media consumption and shopping channels localised to our homes.

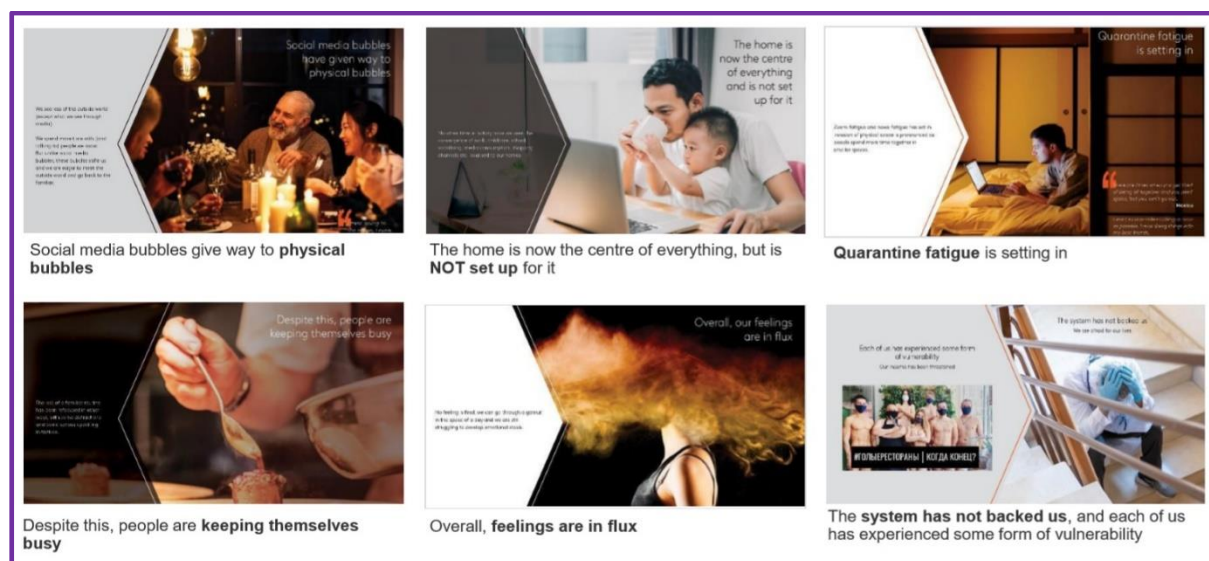
With everyone in the family now doing everything at home, we've had to carefully consider the balance of traditional comfort and these new life necessities as quarantine fatigue is setting in. By no means a South African phenomenon, we are spending so much time online, spending mental energy processing communication in a different way that we now struggle to switch off. Despite efforts at work-life balance, 'leaving work' now means closing one screen to open another for the next activity to keep busy, which contributes to a continued fatigue state as there simply aren't enough moments in the day to stop, breathe and regroup.

### **From social media bubble to physical bubble and all the emotional yoyo-ing in-between**

We're also largely shifting from content consumers to content creators as we learn new skills and share these experiences on Instagram and TikTok. Little wonder that our feelings are in such a state of flux, as no two days are the same. It's a fast change from gratitude and enjoying spending time with those in our bubble to frustration, before bouncing back to optimism and struggling with cabin fever as

we long to see those left outside, especially as most of us just don't feel backed by the system. That's largely because living circumstances are unequal.

Many feel their basic needs have been threatened, some don't even feel safe at home – if you're a woman in the world, this is a continuous conversation. We also feel disoriented, as we have lost control of our time and food scarcity is a reality for all, leaving us anxious about where our next meals will come from and whether essentials will be in stock.



That's why vulnerability is the most powerful human emotion across all classes right now, as we are spending so much time in isolation. Marketers need to connect with consumers by creating a sense of community, through nostalgia and anchoring in the 'good old days' as many are using these as coping mechanisms. As the response to lockdown is to either slow down and be mindful or keep busy and ignore it, brands need to speak empathetically to tap into new consumer realities.

Moving from individual households to broader society and culture, after a period of prolonged isolation, brands also need to consider the emotional and functional after-effects, as well as which are likely to stick and which are temporary, particularly in a multicultural context:

## Examining our lived experiences in the midst of an existential crisis

Regardless of market, this is best examined across dimensions of relationships, entertainment, work, money, leadership and health, in order to better anticipate what the future might bring.

**Relationships:** The changing world around us means we've shifted from a 'programmed' to discerning life, as we want to let go of transactional relationships and invest time in connection rather than coexisting, with healthy relationships as the family takes centre stage. Video calls have humanised interactions as we insist on deeper interactions and strive to curate the lives we want, with more time at home meaning traditional gender roles are also shifting in the household.

**Entertainment:** Now is the time for mindful creation, as we shift from a need to be entertained to filling that space ourselves and creating pleasurable moments. This is both through the nostalgia of boardgames and re-watching favourite series while rediscovering old creative pursuits like gardening as well as in new online avenues such as mobile gaming, meditation apps and craft groups.

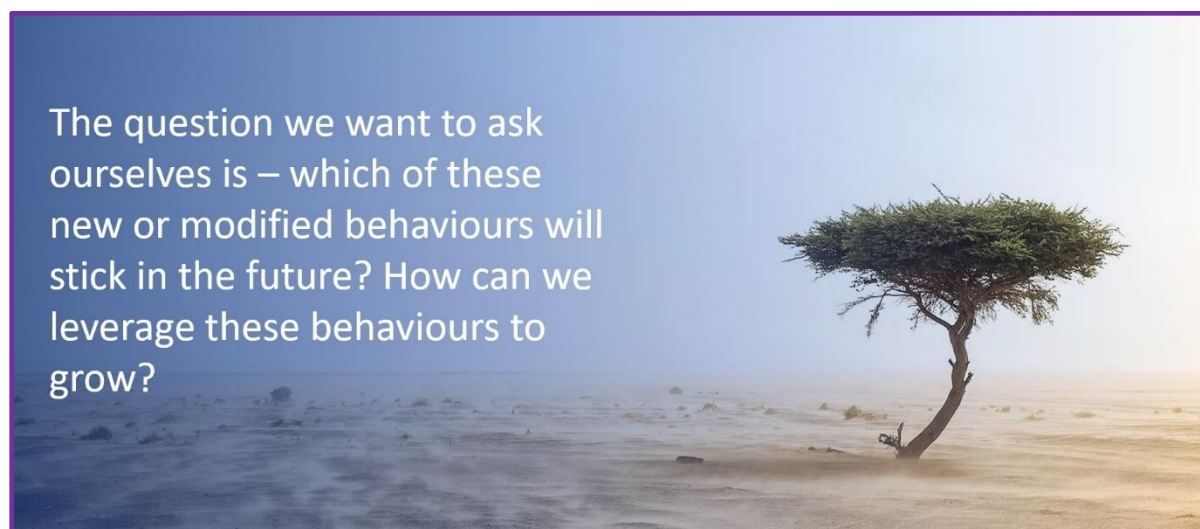
**Work:** The definition of work itself has changed, with a focus on side hustles as our livelihoods are more in question than ever. A new conversation is emerging around value creation for a productive workforce, as flexibility can be a pain point – there's so much to fit into the day from home, with pressure to visibly demonstrate you are working from home thanks to technology. This has made us rethink our value as workers, as the future belongs to those who can quickly upskill and switch hats to supplement their income.

**Money:** Financial vulnerability has driven the reconfiguration of the previous focus on prudence and accumulation to one of protection and a need for financial education as many feel their livelihoods is genuinely under threat. This translates into new shopper behaviours as consumers make savvier

decisions, considering practicalities such as price comparison and storage space when bulk buying. There's also been a reprioritisation of essentials and looking beyond money to faith for inspiration.

**Leadership:** There's been a tangible shift as we demand more transparency, collaboration and flatter structures. But consumers don't just expect this from government – brands and corporates also need to act and go beyond profit to focus on solving the challenges people face today. This is a hot topic across markets as we recognise our collective responsibility. This renewed focus means we are also quick to call out tone-deaf acts as leadership is not a beauty contest.

**Health:** Vulnerability is especially strong here as the pandemic has proven there are no guarantees. We are moving away from 'blind belief' pill-popping to more holistic ideals of health, hygiene, immunity and how we think of energy. We're acknowledging our mortality taking personal responsibility with a firm commitment to exercise, wellbeing and immunity-boosting, as hygiene and hand washing are taken more seriously as a preventative measure.



Looking at the stickiness of these new behaviours in future, South Africans overall are more concerned about their finances and the economy than their health, so we need to relook at motivation. Each decision is also a balancing act across a set of currencies, because while money matters, each decision we make is based on whether that cost is more important than our other currencies of time, connection, vitality and safety. These in turn are based on the cultural, practical and cognitive ease abilities of the new behaviour.

Also keep in mind that behaviour is based on specific pressures from the environment. For now, these range from internal personal motivation to external regulations like social distancing, support received, disruption of industries; new rules for workplaces; and the resources at hand to help us adopt behaviour change. Where the behaviour is practically difficult or creates cognitive discomfort, it's less likely to stick in future.

That's why it's crucial to keep checking in as the context changes. The latest wave of our C19 Barometer findings highlighted six COVID-19 **tribes** of consumers that differ per market, so there is no one-size-fits-all approach. Retrospectively, we've seen proof that some of these behaviours do stick. Take the rise of the private label from the double-dip recession of 2005 as example: It forced consumers to trim the fat in their budget, switching from luxury brands to stores' private labels in order to keep a sense of indulgence while budgeting to buy the basics.

So, ensure your brand offers purposeful brand communication that inspires hope and optimism as it reassures, informs and provides practical help, leverage your route-to-market options to ensure the right packs are available in the right channels, and go for clear pricing structures and simple promotional mechanics that deliver 'value for me'. As the world we live in is no longer permanent it's difficult to anticipate stable needs and whether new behaviours are here for the long haul. Diving into the psychological motivations and ease of cultural fit helps predict their stickiness in navigating this new complexity.

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