HUMAN NEEDS IN THE ‘NEW NORMAL’

FIREFISH
APRIL 2020

EXPLORING HOW HUMAN NEEDS HAVE BEEN IMPACTED

IN A WORLD WHERE EVERYTHING HAS CHANGED, VERY QUICKLY

We're living in an unprecedented moment. Life has been upended. We're having to rapidly adapt to a new set of routines & expectations

A fantastic article in the Harvard Business Review[1], compared what the world is going through, to grief and spoke to David Kessler *(who co-authored the Five Stages of Loss)*. Kessler says we're experiencing grief on multiple levels: grief for a life we've suddenly lost & anticipatory grief over how this might all end

With the lives we knew pre-pandemic feeling so distant, with a very real threat today and with the future too unclear to provide comfort, our fundamental needs are being reshaped dramatically

With this in mind, we explored 6 core human needs to understand how they've been impacted by our 'new normal'

In particular, looking at how our needs from brands are shifting

6 core needs condensed & evolved from Max Neef's model of Fundamental Human Needs

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EXPLORING HOW HUMAN NEEDS HAVE BEEN IMPACTED

THE DIFFERENT LENSES WE APPROACHED THIS THROUGH

ONLINE GROUPS

With adults across the US

4 x groups: South (Baby Boomers), E coast, W coast, Midwest (Millennials & Gen X)

ONE-PULSE SURVEY

With 300 US adults

GEN Z 'HACK SQUAD'

Consultancy with panel of leading-edge kids & teens from our Gen Z & Family specialist company **The Pineapple Lounge**

SOCIAL LISTENING

DATA REVIEW

Of existing published articles & data sources + brand responses

Respondents from groups were given the option to receive their incentive in cash or have it donated directly to the NYC Mayor's Fund

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FIRST, A LOOK ACROSS KEY DIMENSIONS THAT SHOW HOW

LIFE HAS CHANGED DRAMATICALLY

SOCIETAL

Seeing society in a new light

Observing **inequalities & structural flaws** that were always there

But also recognizing a newfound sense of **solidarity & civility**

We're seeing how thin the line is between civilization & chaos

Millennials & Gen X, Midwest

People talk about the solidarity after 9/11 & this is the closest I've seen to that

Millennials & Gen X, E Coast

BEHAVIORAL

Life is more blended than ever

Divide between work & life has blurred, people are carving out new ways to attain work/life balance

Finding **new ways to share confined space & time together**

I'm trying to reserve take-out & alcohol for weekends as work hours are gone now

Millennials & Gen X, E Coast

We get to eat dinner with our son every night & typically he's off at college. We've been playing boardgames as a family to pass the time

Millennials & Gen X, Midwest

FISCAL

Uncertainty breeds caution. For many, luxuries are out, frugality is in

Shopping has become much more structured, less adhoc & fluid

Conversely, outgoings are down, some are using this on **bigger ticket items to help adapt** to new life

I'm not a big shopper as I don't cook, so I've done a 180. I now plan when I go & what I'm getting, it's not normal for me!

Baby Boomers, South

We're like $500 below budget this month… We've cut down our daily spending but we're making bigger purchases on things to entertain ourselves

Millennials & Gen X, Midwest

CULTURAL

Restriction has **highlighted the breadth of what people previously enjoyed & took for granted**

Maintaining **connection to prior cultural touchpoints** is vital

Often via an **adapted digital lens**

I've been trying to pick up new things that I wouldn't usually have time to do in normal life, I've been learning to play guitar & spending time on photography

Millennials & Gen X, W Coast

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CHANGES & IMPACT

FELT BY ALL GENERATIONS

GEN Z

I pretty much don't have an eating schedule now. And I can't eat lunch with my friends anymore since I'm not at school. And that makes me feel sad

Gen Z (8 years old)**, West Coast**

It feels like finals week, I don't know why but I have the same stress & inability to think that I get during finals week

Gen Z (14 years old)**, West Coast**

I'm worried for my grandpa, he's sick & they just ran a test, so that's pretty spooky, but I know he's gonna be okay, no matter what. He can push through!

Gen Z (12 years old)**, West Coast**

MILLENNIALS & GEN X

The main change for me has been buying in bulk & having to really plan. I've been trying to buy more from the grocery store & getting whatever will last me the longest. I've also only been drinking hard liquor, not beer or wine, as it lasts longer!

Millennials & Gen X, East Coast

For me, it's like I'm doing everything I should've been doing before. I'm wiping my card & my phone & stuff down. I'm more conscious of picking things up & putting them back. It's made me more aware. Outside of this virus there's so much else we can pass on to each other

Millennials & Gen X, East Coast

BABY BOOMERS

Saying 'don't go visit your parents at age 85', that was a really head-on example of how things are different & changing & how important respecting the rules are

Baby Boomers, South

What has been beneficial for us is some of our neighbors. We haven't been able to find masks so we've had a neighbor give us some. We've been sharing products that we have, so that we don't have to go to the store

Baby Boomers, South

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SAFETY

1 PERCEPTIONS ARE SHIFTING OVERNIGHT

Adapting to **new ideas of how we care for or protect ourselves & those we love**

Suddenly looking for **new cues to safety, hygiene & social distancing adherence**

> *I used to look at other countries & think how weird wearing masks was… Now it's the mask I don't want to wear but am wearing, the Lysol I carry around with me everywhere. I want to live, I don't want to die*
>
> **Baby Boomers, South**

2 BRANDS ARE NOW EXPECTED TO MIRROR THIS & SHOW COMMITMENT (to people over profits)

Maximizing path to purchase safety: *protective wear for staff, plastic screens in store, contactless payment methods & touchscreen interfaces*

But **fundamentally**, also demonstrating **care for workforce safety**

Bigger brands can have greater trust owing to scale & reputation management

> *We've been trying to order local, but it's a double edge sword as big chains probably have better standards. After this I'll definitely want to support local places but I'll think twice about hygiene*
>
> **Millennials & Gen X, Midwest**

> *If somewhere doesn't have Apple Pay I don't shop there, I'm not handing over cards*
>
> **Millennials & Gen X, E Coast**

3 CLEAR DESIRE FOR PERMANENT CHANGE

There's hope *(though not always belief)* that **steps taken now will be permanent**

Both from a **customer safety & staff welfare** perspective

Brands can **demonstrate leadership** by committing longer term to positive changes

> *I'm hopeful but a bit more pessimistic. I'm not convinced restaurants & shops will actually change their ways & that they'll just go back to just doing enough to meet standards they need to*
>
> **Millennials & Gen X, W Coast**

THE NO 1 NEED FROM BRANDS

#1

Of the 6 explored needs, within our One-Pulse survey

Base (300). If brands were to do one thing for you during this pandemic, what would you want them to do? (Ranking exercise) See appendix for wording of options

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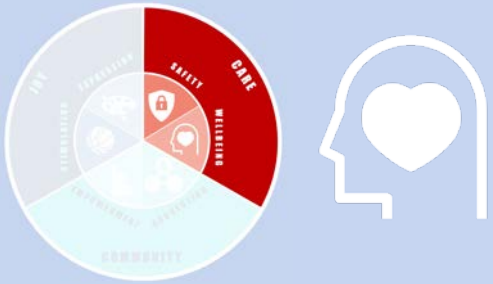

WELLBEING

1 MORE INTENTION IN OUR EATING

Driven in tandem by increased **need for planning** & a **heightened sensitivity** to how we **take care of ourselves**

There's a positive aspect to this, with **greater creativity & adventure** byproducts of new routines & thinking

> *I think we ate pretty healthy before, but now we've really stepped up our game*
>
> **Millennials & Gen X, Midwest**

> *I'm getting more creative, working with what's available, even trying new cocktails for Friday happy hour*
>
> **Millennials & Gen X, E Coast**

2 INVESTING MORE IN SELF-CARE & FEELING GOOD FROM THE INSIDE OUT (not outside in)

Self-care routines are more important than ever as **people look to retain ways to feel both cared for & indulged**

While superficial personal care regimens have dipped in importance, **people still want to feel good** in their own skin, so **rituals such as face masks, hair treatments** are maintaining a key role

> *I'm doing baths & face masks & stuff, more of the longer-term personal care. But short term, showers have become optional, clothes are just done. A lot has fallen by the wayside*
>
> **Millennials & Gen X, Midwest**

> *I'm trying to take better care of my skin & getting my hair healthy. There's more time now for that kind of self-care*
>
> **Millennials & Gen X, W Coast**

3 POSITIVITY & BALANCE ARE PRECIOUS

People are seeking anything that **can help them maintain a positive, calm outlook**

Meditation, yoga, virtual gym classes all figured highly in people's experiences

As well as simple distractions such as **reading, puzzles, domestic tasks etc**

> *I'm on 14 day self quarantine, I've never been alone for 14 days before… but I've been trying to look at silver linings, getting back into things I didn't necessarily have time for before & trying to keep an optimistic mindset about it all*
>
> **Millennials & Gen X, E Coast**

THE NO 2 NEED FROM BRANDS

#2

Of the 6 explored needs, within our One-Pulse survey

Base (300). If brands were to do one thing for you during this pandemic, what would you want them to do? (Ranking exercise) See appendix for wording of options

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CONNECTION

1 CONNECTION IS MORE IMPORTANT THAN EVER

It's an oft-repeated phrase, but **isolation really has brought people together**

People are **looking out for & reaching out to** one another **more than ever**

The **collective 'grief'** of the experience has created a **unique civility & solidarity**

> *I think it's definitely been a big sense of community that's brought a bunch of people together because we're all quarantined and we're all confused & scared and we're all at home and so everyone is kinda reaching out*
>
> **Gen Z, W Coast**

2 BRANDS THAT HELP PEOPLE ADAPT & STAY CONNECTED CAN MAKE A HUGE IMPACT

From the sudden prominence of **Zoom & House Party** to **Netflix viewing parties & Facebook Portal**, brands can help people adapt & maintain connection virtually

Brands can also help people now living in close quarters to **foster connection at home.** *From activities designed to bring people together to cross generational interests*

> *We're doing online happy hours. We live out of the city limits, for us to get to a bar, it's a 10 mile drive at least. In future it could be beneficial to us to keep connected virtually*
>
> **Millennials & Gen X, Midwest**

> *We've been playing a lot of boardgames as a family now we're suddenly all together*
>
> **Millennials & Gen X, W Coast**

3 A 'NEW SHARING ECONOMY' HAS EMERGED

'Sharing economy' usually means access to larger items *(cars, equipment, real estate)* but we're **now seeing a new peer sharing**

People are **sharing supplies & volunteering** to allow access to key supplies for those in greater need

> *I'll send homemade masks to anyone who gives me their address now, it's all about sharing right now*
>
> **Baby Boomers, South**

> *I've tried to connect more with neighbors, I'll see if they need anything when I go shopping*
>
> **Millennials & Gen X, Midwest**

THE NO 3 NEED FROM BRANDS

#3

Of the 6 explored needs, within our One-Pulse survey

Base (300). If brands were to do one thing for you during this pandemic, what would you want them to do? (Ranking exercise) See appendix for wording of options

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EMPOWERMENT

1 THE NEIGHBORHOOD IS BACK

People are seeing a **new sense of community & neighborly closeness**

With support from govt felt to be lacking, **people are** feeling **empowered to look out for each other** in an unparalleled way

The people are on their own, let me make that clear, the people are on their own! The govt is not there to help, if you're short on toilet paper, you need that neighbor to help. This is going to be grassroots & come from the bottom as much as the top

Baby Boomers, South

2 PEOPLE WANT TO HELP WHERE THEY CAN: On the front line, in the community or with the economy

Though money is tighter, many **are feeling more charitable than ever** & **looking to help in any way they can**

Supporting local businesses was mentioned almost universally

Brands that **provide people with simple ways to contribute** (while demonstrating their own commitment) are appreciated

People are giving away free food & I would hope that moving forward, children across the US are being fed like they're being fed now. There are small businesses & communities feeding children twice a day. This is something we need to do regularly. People are hungry, some kids only get meals from schools.

Baby Boomers, South

3 SHINING A LIGHT ON THE NEED FOR CHANGE

The crisis has highlighted **systemic flaws & inequalities** in society, sparking a **strong desire for long-term change**

Creating an **empathetic bridge across society** & an increased awareness that **we need to think more collectively**

We need to keep doing it after this crisis is over. Use this time to help people out and then make this change a permanent one. Don't go back to not giving a shit after this

Millennials & Gen X, E Coast

THE NO 6 NEED FROM BRANDS

#6

Of the 6 explored needs, within our One-Pulse survey

Base (300). If brands were to do one thing for you during this pandemic, what would you want them to do? (Ranking exercise) See appendix for wording of options

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STIMULATION

1 A PRESSING NEED, DRIVING ADAPTATION

Confinement & uncertainty create a **huge need** for both **mental & physical stimulus**, helping provide **distraction & structure**

Forcing people to adapt & find new sources. Clear thirst for new ideas to help

In some cases **driving up tech adoption**

> *It's been things that help add structure to my day like fitness & yoga classes. I have trouble getting with my normal schedule, so they help me organize my day better*
>
> **Millennials & Gen X, E Coast**

2 STREAMING, GAMING & PODCASTS ARE ALL KEY + A DESIRE TO LEARN NEW SKILLS

Streaming is the dominant distraction; able to entertain & also provide talking points, additionally creating connection

Some are **investing in bigger ticket items to help them get through**, e.g.: games consoles, Pelotons, TVs, musical items

> *I never really did a lot of entertainment stuff. But now we've got more time to spend together we've discovered Netflix & watching Tiger King*
>
> **Baby Boomers, South**

> *I've been streaming more & I'm probably going to upgrade my internet. I pulled out my old XBox but it's broken so I'll probably buy a new one*
>
> **Millennials & Gen X, E Coast**

3 SPORTS FANS ARE FEELING STARVED THOUGH

With nothing happening, **they're looking for anything that can help plug the gap**

Re-runs, documentaries, peripheral content (e.g the draft), social channels. **Anything to get a taste of what they're missing**

E-sports a burgeoning alternative for some

> *My family is watching every old sports game they can because they're in a black hole without sports*
>
> **Millennials & Gen X, W Coast**

> *Imagine when the first sport returns, It'll have a billion viewers, even if it's UFC*
>
> **Millennials & Gen X, W Coast**

THE NO 5 NEED FROM BRANDS

#5

Of the 6 explored needs, within our One-Pulse survey

Base (300). If brands were to do one thing for you during this pandemic, what would you want them to do? (Ranking exercise) See appendix for wording of options

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EXPRESSION

1 CREATIVE PURSUITS PLAY A KEY ROLE

Maintaining creative outlets feels vital & people are using increased time to nurture existing talents & seek out new avenues

Music, photography, art, reading, gardening etc

YouTube is a key source of inspiration for those seeking new skills & pursuits

> *I'm rediscovering old things I bought but never gave time to, like a seed sprouter I now use*
>
> **Millennials & Gen X, Midwest**

> *I've been learning guitar & doing this thing called the Isolation Journals; a prompt each day to read & think about*
>
> **Millennials & Gen X, E Coast**

2 PRIORITIES WHEN IT COMES TO AESTHETIC SELF-EXPRESSION HAVE SHIFTED

Less pressure on superficial presentation, *reducing onus on rituals such as make-up, hair styling, dressing*

People are also **less brand-conscious & discerning**. More flexible & open minded

But while daily need is lower, **some seek *moments* of full expression**, to maintain normalcy, *e.g getting dressed up, made up*

> *I'm more accepting that Brand A or Product A won't always be available, so I'm using whatever products I can get.. You need to be more flexible.*
>
> **Millennials & Gen X, Midwest**

> *I have moments where I think it's really important to get dressed up & look nice, so I'm not just in sweats all the time .*
>
> **Millennials & Gen X, E Coast**

3 SEEKING NEW WAYS TO FIND JOY & CELEBRATE

With **major celebrations cancelled or postponed** *(birthdays, graduations, weddings*), we need new ways to share joy

Potential role for brands to provide **lightness, relief & a suspension** from a depressing & disrupting reality

> *I think for this situation we're all in now, brands should maybe address it, maybe not, but put some funny, lighter stuff out there and try to give us a sense of something feeling normal & not just all doom & gloom*
>
> **Millennials & Gen X, Midwest**

THE NO 4 NEED FROM BRANDS

#4

Of the 6 explored needs, within our One-Pulse survey

Base (300). If brands were to do one thing for you during this pandemic, what would you want them to do? (Ranking exercise) See appendix for wording of options

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MORE BROADLY

WHAT PEOPLE ARE LOOKING FOR FROM BRANDS

ABOVE ALL... DO SOMETHING

For me, it stands out if a brand isn't doing anything. One of my favorite local companies is a Candle maker called Candle Folks, they had this round up & donation to local charities. They're a tiny business, I know they're struggling, but they're doing something. If you're a big businesses & not doing anything now… Well, you're a participant with us in this world, so it's time to step up

Millennials & Gen X, East Coast

Brands that don't help now will be judged by history as being on the wrong side of this fight

Baby Boomers, South

Big companies have a lot of cushion to fall back on. I know you have big revenues, I see what you're doing

Millennials & Gen X, Midwest

SHOW COMPASSION, STARTING WITH STAFF

Take care of your employees, cut your CEO salary a bit. Who companies take care of right now will impact their reputations for a long time to come. I think being good to your employees is the most important thing

Millennials & Gen X, West Coast

ADD SOME LEVITY TO THE CONVERSATION

There's a few companies that have started advertising in really clever ways, like Netflix putting spoilers for their shows on billboards saying 'should've stayed at home', that's absolutely brilliant

Millennials & Gen X, West Coast

IF YOUR BRAND CAN... HELP DIRECTLY

If I could talk to the CEO of [my favorite brand] Justice, I'd say 'Can you please make some super cute face masks for girls to wear & cool hand sanitizer recipes so we can make our own?' because many people are sick and need help & essentials, including healthy people, so that more people don't get sick

Gen Z (8 years old), **West Coast**

GIVE PEOPLE A PLATFORM TO HELP

Everyone is losing money so not every company has the bandwidth to give money but at least if they're giving their customers the encouragement or the platform to do something that's great

Millennials & Gen X, East Coast

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SO, IN SUMMARY

WHERE BRANDS CAN HELP MEET EVOLVING NEEDS

EXPRESSION

1. Provide new ways to share joy & celebrate
2. Provide lightness, relief & escape from an often serious, gloomy day to day reality
3. Help quench a thirst for new creative outlets

STIMULATION

1. Provide novel ways for people to find physical & mental stimulation, as the thirst continues & fatigue sets in with existing activities / sources
2. Find novel ways to satisfy desire for competition vacated by on-hold sports

SAFETY

1. Maximize customer safety across path to purchase (stringent hygiene practices, clear reassurances & cues, contactless payment)
2. Demonstrate commitment to workforce safety
3. Make steps permanent to show leadership

WELLBEING

1. Nurture people's newfound creativity & openness, with activity & content that helps them stretch themselves & discover
2. Provide tools to help people in self-care rituals

EMPOWERMENT

1. Help people to participate & help, whether more directly with the response, in their community or by supporting businesses & the economy
2. Mirror that with your own commitment
3. Reflect the new climate of empathy & solidarity

CONNECTION

1. Help people stay connected in novel ways, fostering conversation & shared experiences – *including cross generational experiences*
2. Think about how brands can encourage & align with the 'new sharing economy'

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QUESTIONS?

GET IN TOUCH

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APPENDIX | SOME EXTRA DETAILS ON HOW WE EXPLORED THIS & WHAT WE LOOKED AT

SOME KEY SOURCES WITHIN WIDER READING

- [1]**Harvard Business Review:** 'That Discomfort You're Feeling is Grief' Https://hbr.Org/2020/03/that-discomfort-youre-feeling-is-grief
- **AdAge:** 'Regularly Updated List, Tracking Marketers' Response to Coronavirus' https://adage.com/article/cmo-strategy/regularly-updated-list-tracking-marketers-response-coronavirus/2244251
- **Marketing Week:** 'Everything Will Change Forever After Coronavirus, Won't It?' https://www.marketingweek.com/everything-change-forever-after-coronavirus/?cmpid=em~newsletter~breaking_news~n~n&utm_medium=em&utm_source=newsletter&utm_campaign=breaking_news&eid=13033895&sid=MW0001&adg=DF40870C-BAEE-4E88-B583-4F501DDF5E59

SOME BRAND ACTIONS WE LOOKED AT & ANALYZED

- **P&G:** #Distancedance
- **Facebook:** Never Lost
- **PG Tips:** Partnership with Re-engage to tackle isolation in the UK
- **The Co-op:** Donating its Easter marketing budget to Fairshare
- **Michelob Ultra:** Indoor Open
- **McDonald's:** Logo separation
- **Cerveza Patagonia**: Great Outdoors
- **Frito Lay**: It's About People
- **NIKE:** Play Inside, Play for the World
- **Dyson:** Ventilator contribution

THE 'HACK SQUAD'

The 'Hack Squad' is an ongoing panel of leading-edge Gen Alpha, Gen Z + Millennial parents who have exclusive access to worlds that are rapidly shaping culture

Each member of the panel has been recruited to represent a unique dimension of popular culture and provides exclusive access to their specific areas of passion

The 'Hack Squad' is a proprietary tool of **The Pineapple Lounge**, the **specialist Gen Z, teens & family agency within The Firefish group**

For any further information on them, please contact **Lorna** or **Riwanon** of **The Pineapple Lounge**:

lorna@thepineapplelounge.com riwanon@thepineapplelounge.com

ONE-PULSE SURVEY DETAILS

We asked 300 adults in the US:

If brands were to do one thing for you during this pandemic, what would you want them to do? (ranking exercise)

Help keep me safe / Help maintain my wellbeing / Help me feel connected / Help me feel empowered / Help me feel stimulated / Help me express myself

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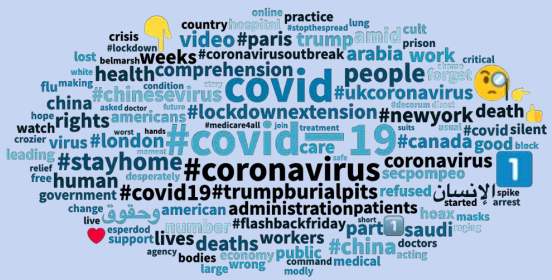
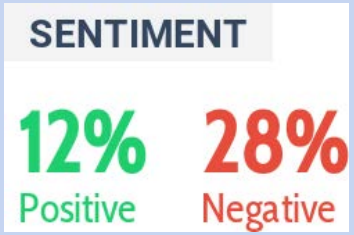
APPENDIX | SOME SELECTED SOCIAL LISTENING OBSERVATIONS

THEMES IN AMERICAN'S ONLINE EXPRESSION IN THE PAST FEW MONTHS

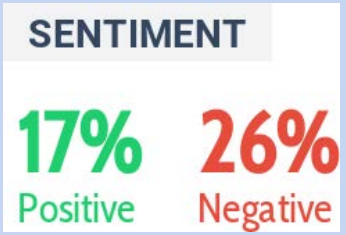


ADVERTISING NET SOCIAL SENTIMENT - APRIL 2020 IN COMPARISON TO APRIL 2019

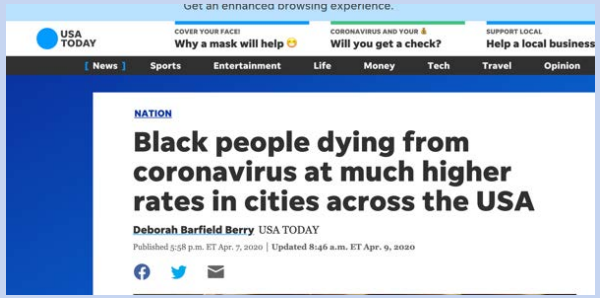
April 2020:

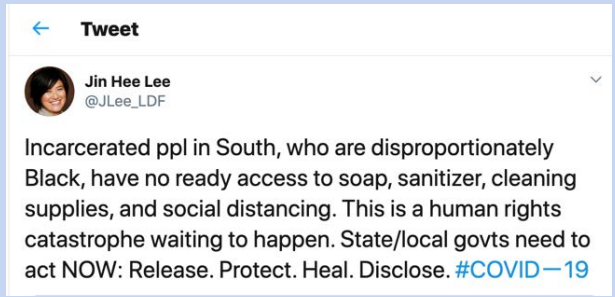


April 2019:



MANY VIRAL, HIGH ENGAGEMENT POSTS POINT TO AWARENESS OF DISPARATE IMPACT





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