

RBH
CREATIVE
COMMUNICATIONS

7 key audiences that have emerged from the COVID-19 pandemic

**A lot has changed
since March 2020 -
here's what you need
to know.**



Established through our research and insights, these are seven of the key audiences we see emerging as we move out of lockdown.

1. Woke Wonderers

2. Belligerent Boomers

3. Green Tinted Glasses

4. The Bear Trap Generation

5. Overwrought Adapters

6. Community Casuals

7. Visceral Individuals

Throughout the report, we'll discuss the effects the Coronavirus pandemic has had on their consumer behaviours and how brands are responding. We'll also refer to the following demographic cohorts:

Gen Z

Anyone born in or after 1997 (up to 23 years old in 2020)

Millennials

Anyone born between 1981 and 1996 (between the ages of 24 and 39 in 2020)

Gen X

Anyone born between 1965 and 1980 (between the ages of 40 and 55 in 2020)

Boomers

Also known as 'Baby Boomers'. Anyone born between 1946 and 1964 (between the ages of 56 and 72 in 2020)

Silent Generation

Anyone born between 1925 to 1945 (between the ages of 75 and 95 in 2020)



Audience #1

Woke Wonderers

More than six in ten younger consumers closely consider a company's ethical values and authenticity before buying their products.

Pulse

Who are they?

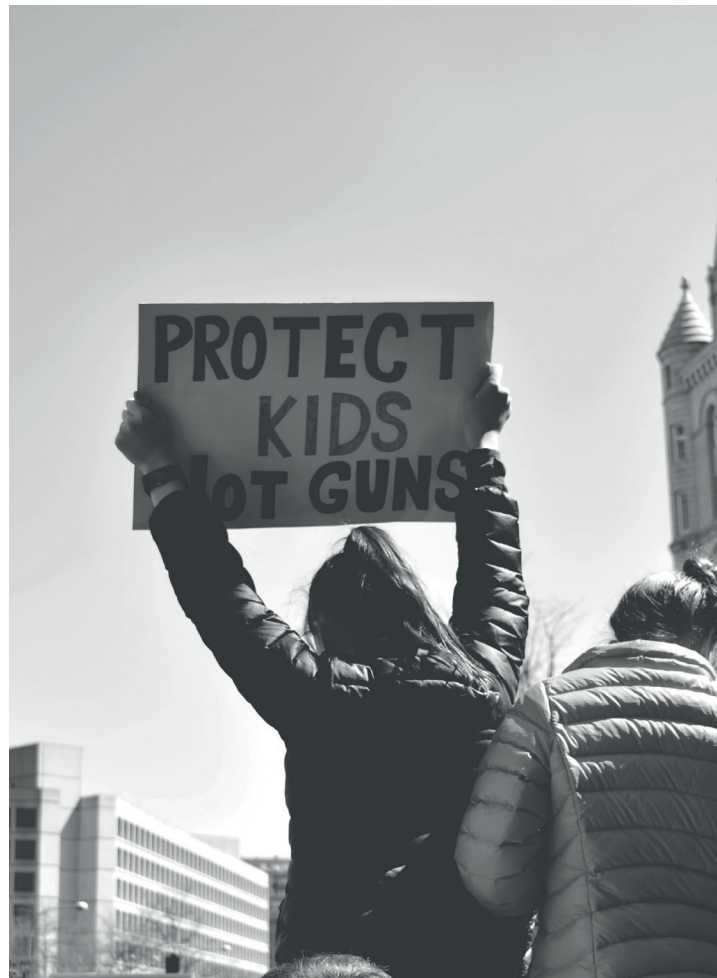
With more time to become educated during lockdown, this audience is furious with the state of the world and its bigger ethical issues. Most notably, LGBTQ+ rights have become more prevalent in trans rights and gender studies. Alongside this change in discourse comes increased awareness and activism within the Black Lives Matter movement.

What else do we know?

Many people online are referring to this time as a state of awakening about racism, injustice and privilege.

In a worldwide survey conducted this year by Ford, 63% of respondents said they are "more aware of a brand's stance on issues of gun control, immigration and issues relating to equality than [they were] in the past."

In the United States, 42% of consumers surveyed said they had boycotted a brand because of the brand's values. Meanwhile in Europe and Asia that number was even higher, reaching 68% in India. Over 60% of respondents claimed that they were attracted to companies based on transparency, treatment of employees, ethical values or perceived authenticity.





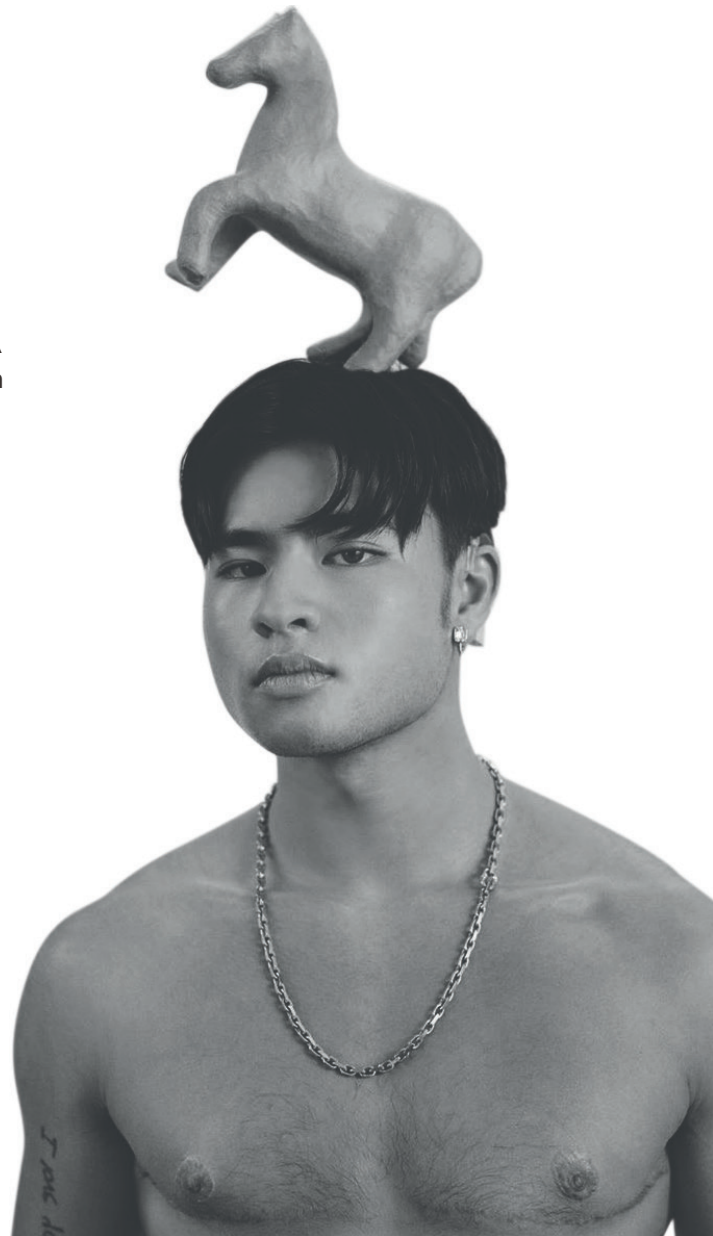
How is the landscape responding?

Gender is out, activism is in

We've seen increased popularity of trans activists such as @chellaman and @stef.sanjati, as well as gender non-conformist influencers. This year has also seen the launch of Drag Out The Vote, a non-profit organisation in the USA that works with drag performers to promote participation in democracy. Led by fierce drag kings and queens across the nation, the organisation advocates for increased voter access and engagement.

In the latest season of RuPaul's Drag Race, culminating in two episodes that were filmed from home, the topic of woke politics was brought to life. At numerous intervals throughout each show, the queens would hold up signs encouraging young people to register to vote, while patriotic queer music played in the background (RuPaul's single 'American' promoting all walks of life to equality in America, no matter what your background). This is an effort to use queer media to showcase the importance of political activism in difficult and divisive times. The show also took time to discuss immigration, HIV and gay rights throughout the season.

@chellaman - Instagram



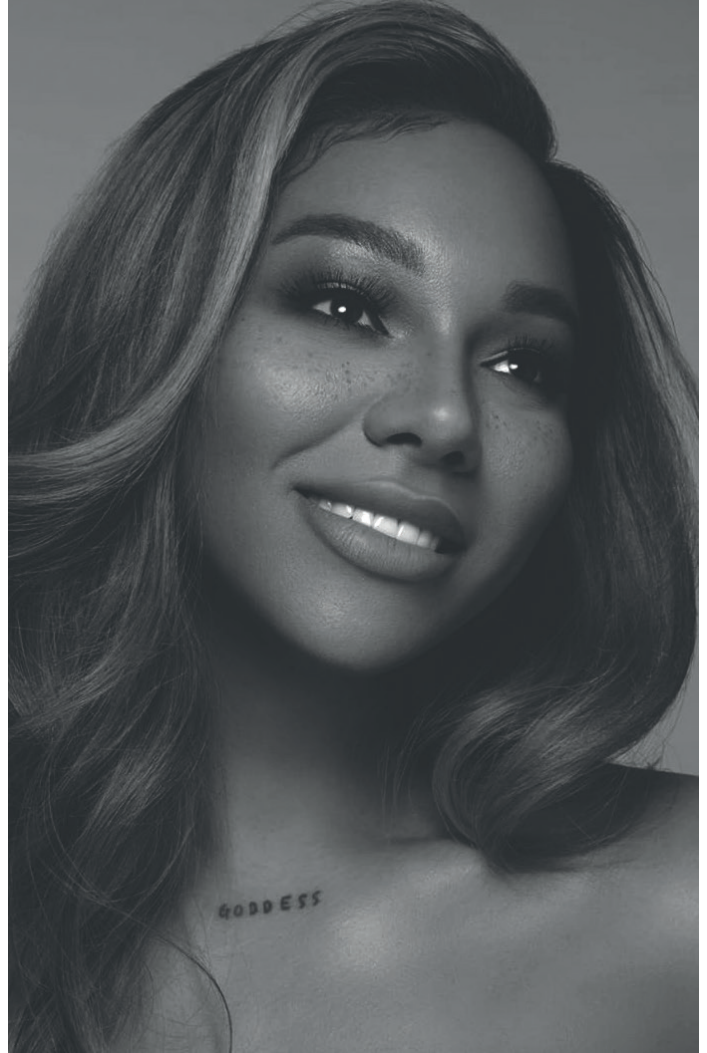
It's time to hold brands accountable

Following the rise of the Black Lives Matter movement over the last few weeks, many brands have posted statements of solidarity which Woke Wonderers have deemed hypocritical. One of these brands is L'Oréal, which model and trans activist Munroe Bergdorf (@munroebergdorf) accused of using the movement as a PR stunt.

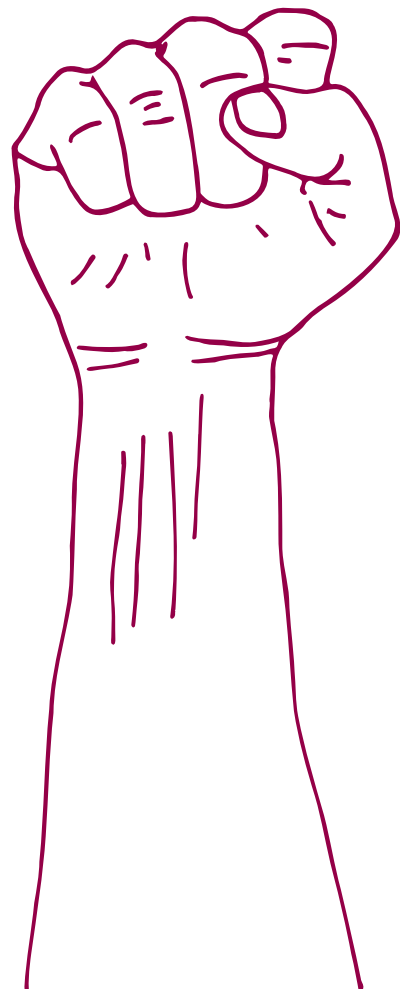
While working with L'Oréal in 2017, Munroe spoke openly about racism and white supremacy, which resulted in her being dropped from the campaign and, in her words, being 'thrown to the wolves'. L'Oréal faced heavy criticism from models, influencers and social media users who encouraged others to boycott the brand. After a prolonged silence, L'Oréal has apologised and offered Munroe a consultancy role on their UK Diversity and Inclusion Advisory Board.

Similarly, UK fast fashion brand InTheStyle has come under fire for releasing a charity t-shirt in support of Black Lives Matter, despite not featuring any black women on their Instagram feed since January. They have since removed the t-shirt from their website but, like L'Oréal, are yet to release a statement.

And finally, we can't forego mentioning JK Rowling. Sorry to any Harry Potter fans who don't already know, but our once favourite childhood author has sparked outrage after making anti-trans comments on Twitter during Pride Week. Many Woke Wonderers are urging others to boycott her (some are even willing to pretend Daniel Radcliffe wrote the series of books) and instead donate to organisations supporting the LGBTQ+ community.



@munroebergdorf - Instagram



Audience #2

Belligerent Boomers

Over 60% of boomers don't feel very concerned about COVID-19, where over 60% of Millennials and Gen Z feel extremely concerned.

Global Web Index

Who are they?

This is the generation that isn't bothered by the new rules, regulations or warnings regarding COVID-19. They're more focused on starting up life again and resuming a sense of normality.

What else do we know?

According to ONS, around 80% of adults say they have enough information to protect themselves from the virus, a decrease on recent weeks and a similar level to the start of lockdown measures.

Rather than worrying about their health, this audience places more emphasis on their quality of life. ONS reported that 65% of adults say they've been affected by the "lack of freedom and independence", while 54% expressed concerns with the inability to make plans, which has had a knock-on effect on personal travel plans and life events.

McKinsey Global found that more than 90% of consumers globally expect daily routines to be affected for more than two months following the end of the Coronavirus pandemic.

This shows us that while lockdown restrictions in the UK are easing, it could still be a long time before Belligerent Boomers have the autonomy they so desperately crave.

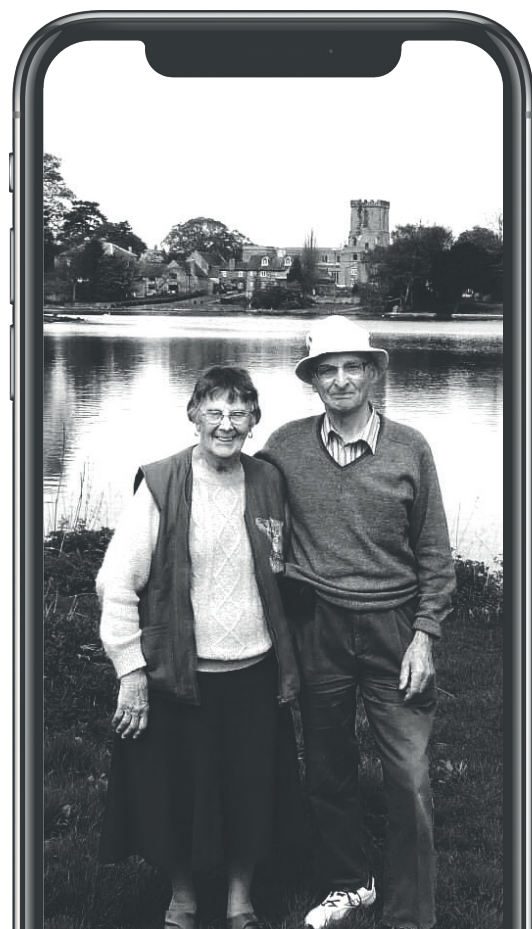


How is the landscape responding?

Back to basics

Brands have previously been cautious and reserved with marketing the more traditional elements of their service. However, something that's key to this generation is a personal customer service driven approach. This is something we believe brands can leverage in the move back to the 'new normal'. In order of least to most trusted, the best way to reach this generation is through DM, Radio, Print and TV.

@geoffreywalk - Instagram



The new internet heroes

Baby Boomers continue to trail both Gen Xers and Millennials on most measures of technology adoption, but adoption rates for this group have been growing rapidly in recent years. For example, Boomers are now far more likely to own a smartphone than they were in 2011 (68% now vs. 25% then) (Pew Research).

Although Geoffrey and Pauline Walker fall outside the typical Boomer age bracket, we think the husband and wife duo are a perfect example of the people adapting to and getting on with life during lockdown. In the last few months, their joint Instagram account @geoffreywalk has risen to fame and people are loving seeing snippets of the couple's daily life and reading Geoffrey's heartfelt captions about his wife.

Audience #3

Green Tinted Glasses

When thinking about the future, over 1 in 5 adults said the pandemic had made them more concerned about climate change.

ONS



Who are they?

This can be anyone who has recently redeveloped more of an environmental conscience. Dubbed the 'green tinted glasses', multiple generations including Boomers and Gen X can put these on. Millennials already had these on before COVID-19 and Gen Z practically invented them.

What else do we know?

Over 9 in 10 adults agreed that the 'Stay Home' measures had positively affected the environment. Of those surveyed, over 9 in 10 also said they thought where changes had been positive, society should try to keep doing them.

This audience willingly turns its backs on brands it was once loyal to if the brand no longer aligns with the green tinted glasses outlook. 47% of internet users worldwide have ditched products and services from a brand that violated their personal values (Hotwire). Getty Images recently performed research surveying 10,000 people and key global findings included that 81% of people globally see themselves as eco-friendly. Furthermore, 50% say they only buy products from brands that try to be eco-friendly.

However, this audience is known to behave in a fickle manner. The same Getty research piece showed that while 92% of respondents believe the way we treat our planet now will have a large impact on the future, 48% also say that convenience when purchasing takes priority. We don't see this as negative; we believe that brands who can leverage both convenience and sustainability will conquer any audience wearing green tinted glasses.



How is the landscape responding?

Brand transparency in fashion

Now more than ever, we are seeing increased public scrutiny into issues that were already present in the fashion industry before COVID-19, such as overproduction and how the disposal of excess inventory contributes to climate change.

Fashion Revolution has created the Fashion Transparency Index, a tool to hold brands to account as the pandemic tests their commitments to environmental and social practices. Brands receive points for how granular the disclosure is of their social and environmental policies, practices and impacts. Findings show that fast fashion brands like H&M and Adidas rank the most transparent, while luxury brands including Balenciaga and Hugo Boss are lagging behind (Vogue Business).



@OwsWills - Twitter

#Don'tVisitWalesChallenge

Temperatures were set to reach 26°C in parts of the UK over the Easter Bank Holiday weekend and officials repeatedly warned the public to stay inside in line with social distancing measures. How did social media expert Owen Williams amplify this message? By creating the #DontVisitWalesChallenge on Twitter, where he shared his alternative versions of iconic tourism posters that encouraged visitors to stay away from rural beauty spots. In response to this, thousands of people shared or created their own posters.



Audience #4 The Bear Trap Generation



In the UK, 40% of employers believe that more than any other generation, it's their Gen X employees who are most affected by stress and anxiety related to home life.

Grid 2019

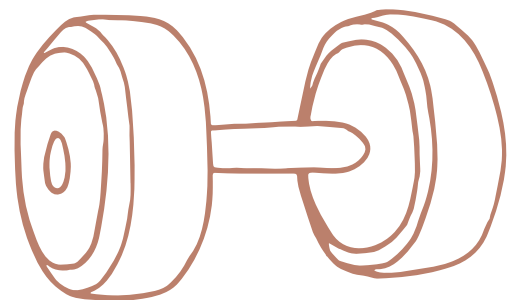
Who are they?

Also known as the Sandwich Generation, this is an incredibly powerful group of people that often go forgotten. Born predominantly between 1960 and 1985, this generation had children later in life and are now caught in between caring for both their children and their own parents. They are a group of realists who are concerned about more than just COVID-19.

What else do we know?

According to the National Alliance for Caregiving 2019, this generation spends on average 22.6 hours a week providing care, leaving them short on time, funds and freedom.

Based on this, it comes as no surprise to us that at the end of April 2020, 87% of brits expressed a desire for the lockdown to remain in place, revealing deeper level anxieties about returning to 'normal' (The Conversation).



Despite the increasing pressures that this generation is under, iGen X have a higher-than-average household income and considerable spending power of \$2.4 trillion globally (Pew Research). This is rising every year and set to take over Boomers in the next few years.

How is the landscape responding?

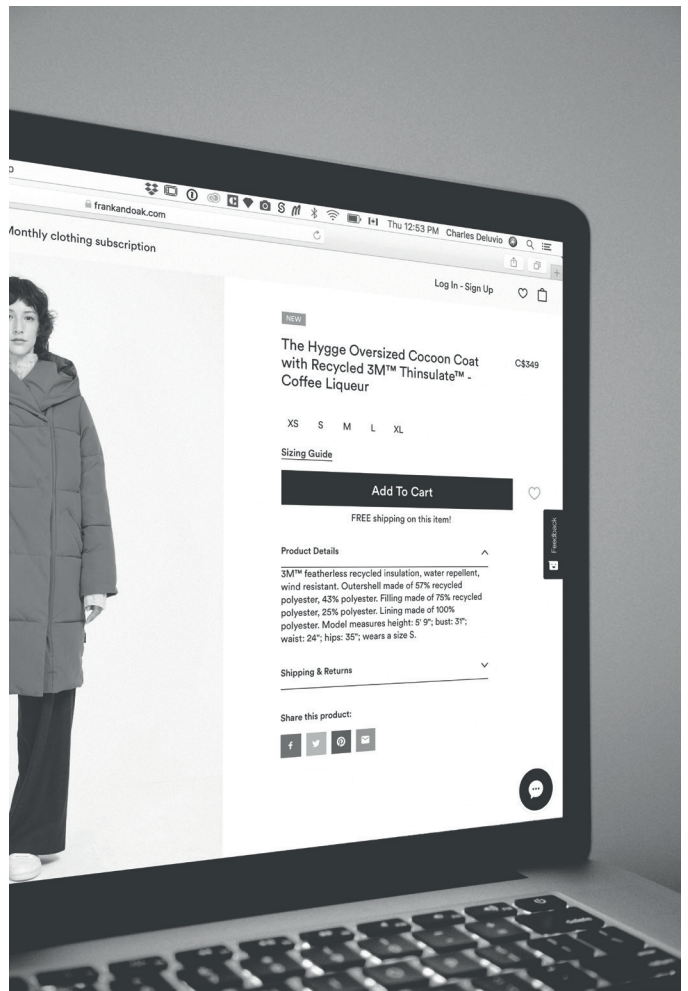
PE lessons for all the family

Fitness guru, TV presenter and author Joe Wicks has become a worldwide hit thanks to his daily PE lessons on YouTube. Born out of the desire to keep children mentally and physically healthy during lockdown, his 30-minute videos have been highly popular among parents and grandparents too. Many adults have reported that since making time to do their daily Joe Wicks workout, they've lost weight, toned up and feel more positive about themselves. Joe Wicks is leading the revolution for accessible home workouts and proving that no matter how busy families may be, they can always make time for their health and wellbeing.

A more accommodating retail space

Retailers are recognising that their typical opening times won't always be convenient for everyone. In response to new night-time consumer research and shopping habits, brands like Credo in America have adopted 24/7 approaches to consumers. By blending physical and digital retail with tools like British technology company 'Hero', users can have consultations and physical retail experiences that follow them home digitally.

@thebodycoach - Instagram





Audience #5 Overwrought Adapters

73% of online Millennials said the internet has been mostly a good thing for society, compared with 63% of users in the Silent Generation.

Pew Research

This is a group that is mostly dominated by Gen Z and Millennials but is shifting rapidly towards Gen X and a large quantity of High Net Worth Individuals across all generations. Overwrought Adapters are seriously concerned with COVID-19 and its financial implications, but they can see a future involving moving with technology. They are mostly already adapted and are early adopters of modern technologies such as AR, VR and platforms like Twitch, Discord and TikTok.



How is the landscape responding?

Moving forward with new technologies

To work around restrictions, consumers have adopted digital and low-touch solutions (McKinsey Global). Videoconferencing between colleagues has become the new norm, as have weekly friends and family quiz nights on Zoom. Then there's TikTok, the platform dubbed the 'social media sensation of lockdown' that we had our eyes on months ago #justsaying. It's become the place where our Overwrought Adapters seek solace in filming themselves dancing or performing skits. Our favourites are @austyn_farrell, who went viral thanks to his energetic Tina Turner performance, Little Mix star @jadethirwall and the inimitable @daisymaycoopers.

zoom

What else do we know?

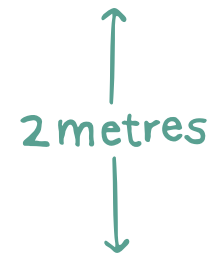
It's clear that AR is a vital platform that brands should be making use of. Globally, 61% of consumers prefer stores that offer AR experiences and 40% would pay more for products they had the chance to experience through AR (Shopify).

The number of mobile augmented reality (AR) users globally is expected to reach 2.4 billion by 2023, fuelled in part by a growing fan desire for AR technology to enhance consumer experiences in media and entertainment (Statista).

@austyn_farrell - Instagram



We can't also forget the more practical elements such as roadside pickup of groceries and telemedicine, the service that facilitates remote healthcare services via a real-time two-way communication between patient and provider. Looking ahead to the 'new normal', McKinsey and Global reported that around 40 to 60 percent of surveyed consumers who adopted these new products and services intend to continue.



Curated experiences... from a safe distance

The hugely popular Museum of Ice-Cream in Seattle admits only 15 people simultaneously, which according to its founder and president Manish Vora: "makes it ideal for consumers who still want incredible experiences, but have anxiety related to giving up distancing."

Another great example from over the pond is New York's Frick Museum, a former mansion belonging to US industrialist Henry Clay Frick that's now a showcase for his impressive art collection. The museum is leveraging the 'quarantini' trend with its Friday evening Cocktails with a Curator live streams, replacing its free admission Friday nights.

The Frick Museum's free weekly virtual Cocktails with a Curator event attracts an average of 20,000 viewers each week, nearly 10% of the average annual 300,000 in-person (paying) visitors.

Over in Amsterdam, curators from its modern art focused Stedelijk Museum host live video tours of the galleries on IGTV every Friday. In these videos, which can garner over 23,000 views, curators talk to paintings as if chatting with friends, answering audience questions as they go.

Live-streamed e-commerce is expected to become a \$13.5bn industry in China by the end of 2020, a twofold increase from 2019 levels.



Audience #6 Community Casuals

In the UK, community cohesion is rising amid lockdown restrictions, with over 50% saying they felt a sense of belonging to their communities.

ONS

Who are they?

Given lockdown globally, paired with the need for emotional connections, CSR activities and healthcare in the spotlight, a new group of people who feel optimistic and positive around their communities locally has sprung up.



@vivastirchley - Instagram

What else do we know?

Stylus has reported that “the notion of local has re-established a major fan-base during lockdown that will spur a move away from the flagship of everything to a homing in on the local hero.”

Even back in 2018, as many as 55% of UK consumers preferred to buy local, with the key reason cited as being to support their immediate economy (IRI).

How is the landscape responding?

Local community initiatives

To document life during lockdown and help celebrate the community in Stirchley, Viva Stirchley (@vivastirchley) was born. The Instagram account showcases ‘doorstep portraits’ of people from the community and tells their stories. From why people love living in the Birmingham suburb to how their lives have changed in the last few months, the page is authentic, heart-warming and underpinned by community spirit.

Influencers pushing the shop local message

There’s no getting away from the fact that small businesses have been suffering as a result of the COVID-19 pandemic. However, it’s not all doom and gloom. Influencers like @livpurvis, @charlottejacklin and @iheartzeena have been encouraging their followers to shop via local and independent businesses by showcasing the clothing, food and homeware they’ve purchased themselves.



@iheartzeena - Instagram

Audience #7

Visceral Individuals

73% of people prefer brands that personalise the shopping experience.

Smart Insights

Who are they?

This audience consists of people whose 'need-for-touch' is only when buying. Others are 'high autotelics' and exhibit a much greater need for haptic sensations – things but also surroundings, for whom much of their pleasure is currently forbidden. For them, but all of us to a degree, sensorial experience will become much more important post COVID-19 (Kate Nightingale, Consumer Psychologist).





Huggies - YouTube

What else do we know?

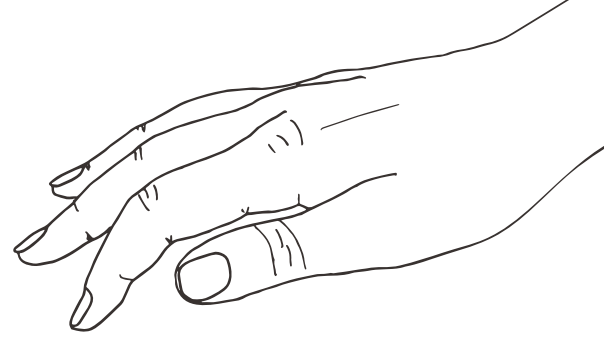
Grounded in reality with a passion for the extraordinary, this is an audience that's in tune with its surroundings.

Extra sensory brands will capture these individuals well and we've got the stats to prove it. OMI found that media that appeals to more than three senses at a time can increase brand impact and engagement by more than 70%.

The sense of touch drives a 62% increase in feelings of connection with an advertised brand and leads to a 50% lift in brand favourability (Immersion).

However, it can be argued that smell is the sense brands should be paying the most attention to. It's been found that we are 100 times more likely to remember something we smell over something we see, hear or touch. Furthermore, three quarters of all emotions generated every day are created through smell (Mood Media).

How is the landscape responding?



Facilitating exceptional experiences through touch

Global nappy brand Huggies highlighted the emotional impact of touch with its Huggies Hug Belt ad, which made it possible for expectant parents using a surrogate mother to experience the feeling of their baby's kicks.

US car manufacturer Ford created Feel the View, a vibrating smart window that enables blind passengers to explore the view outside the car.

A unique fragrance project

A forerunner of the commercial-meets-cultural trend was Mirror Maze – a multisensory four-room installation within a former warehouse on an industrial estate in South London. Mirror Maze was created by acclaimed set designer Es Devlin OBE and co-commissioned by Chanel and i-D magazine as one of five projects within the ongoing campaign Fifth Sense. Designed to celebrate women in the creative industries, it combined video projections, visceral sound design and a bespoke Chanel scent to create a memory-triggering ambience, regardless of the visitor.



If you're keen to keep your brand working smart and turn these insights into something powerful, get in touch with RBH by contacting joeh@rbh.co.uk