



# THE GREAT RE-EVALUATION

How Covid-19 has impacted  
American attitudes, values & behaviors



SEPTEMBER 2021



# BACKGROUND



## THE GREAT RE-EVALUATION

Publicis Groupe Proprietary Research. Quantitative data represents 2,114 nationally representative Americans aged 18-64, including a proprietary attitudinal-based segmentation using GWI.



# THIS IS NOT ANOTHER POST COVID-19 RESEARCH

## BEYOND COVID-19

It explores the lasting consumer impact of the pandemic era as we collectively edge into the future—with Covid-19 as a persistent background or not.

## COVID-19, AND...

While the Covid-19 pandemic has had the most significant impact on all aspects of American life, this research also acknowledges that Covid-19 is not the sole factor which impacted the American experience of the pandemic era.

*#notanotherpostCovidresearch*



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IN ADDITION TO THE PANDEMIC, AMERICANS HAVE EXPERIENCED OTHER MAJOR EVENTS IN THE LAST YEAR AND A HALF



Social unrest & focus on social justice



Changing political dynamics



Life went on...  
People had babies, bought houses, and changed careers.

77%  
Achieved some sort of life milestone during Covid-19

# ULTIMATELY, WE ARE HERE TO EXPLORE...

Who is the American of today and what are the fundamental shifts in behaviors and attitudes which will shape the American experience of the future?

- We can no longer be governed by the pre/during/post pandemic timeline.
- Understanding these shifts and focusing on the consumer of today and of tomorrow, regardless of the Covid-19 timeline, will be vital for successful media and business strategies.



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# HOW DID WE ACHIEVE OUR FINDINGS?

## QUALITATIVE DEEP DIVE

- Garnered contextual understanding and a deep exploration of the personal stories and reflections of Americans
- Worked with Canvas8 to conduct 18 Qualitative interviews in July 2021
- Invited a broad mix of participants reflecting diverse representation & experiences across the US
  - Phase 1: Landscaping
  - Phase 2: Digital Diaries
  - Phase 3: One-on-one hour long in-depth interviews

## QUANTITATIVE GWI CUSTOM SURVEY

- Conducted a 25-minute custom study in July 2021 covering a vast array of topics to quantify behaviors, activities, and ultimately changing mindsets
- Reached **2,114 Gen Pop Age 18-64** respondents within the US utilizing GWI's existing audience panel, and re-contacting a nationally representative sample, balanced on age, gender, income, ethnicity and region
- Conducted a clustered segmentation to identify distinct segments of the market based on robust attitudinal spectrum
  - Data will live inside GWI's platform, giving agency planners access to the insights at anytime
  - Opportunity to create audience segments to activate and buy against

# LIFE RE-EVALUATED



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**Last March, individuals were forced into their homes, losing their usual routines, their social scaffolding, their emotional comforts, and a lot of stability they thought they could rely on.**

While with many challenges, this loss made people shine an unexpected light inward instead

*“ What really surprised me is that I live a boring life.”*

- Danielle, 38, Missouri

The ultimate deprivation experiment, the pandemic era gave Americans a chance to re-assess and re-build their lives, and themselves—with more awareness and purpose.

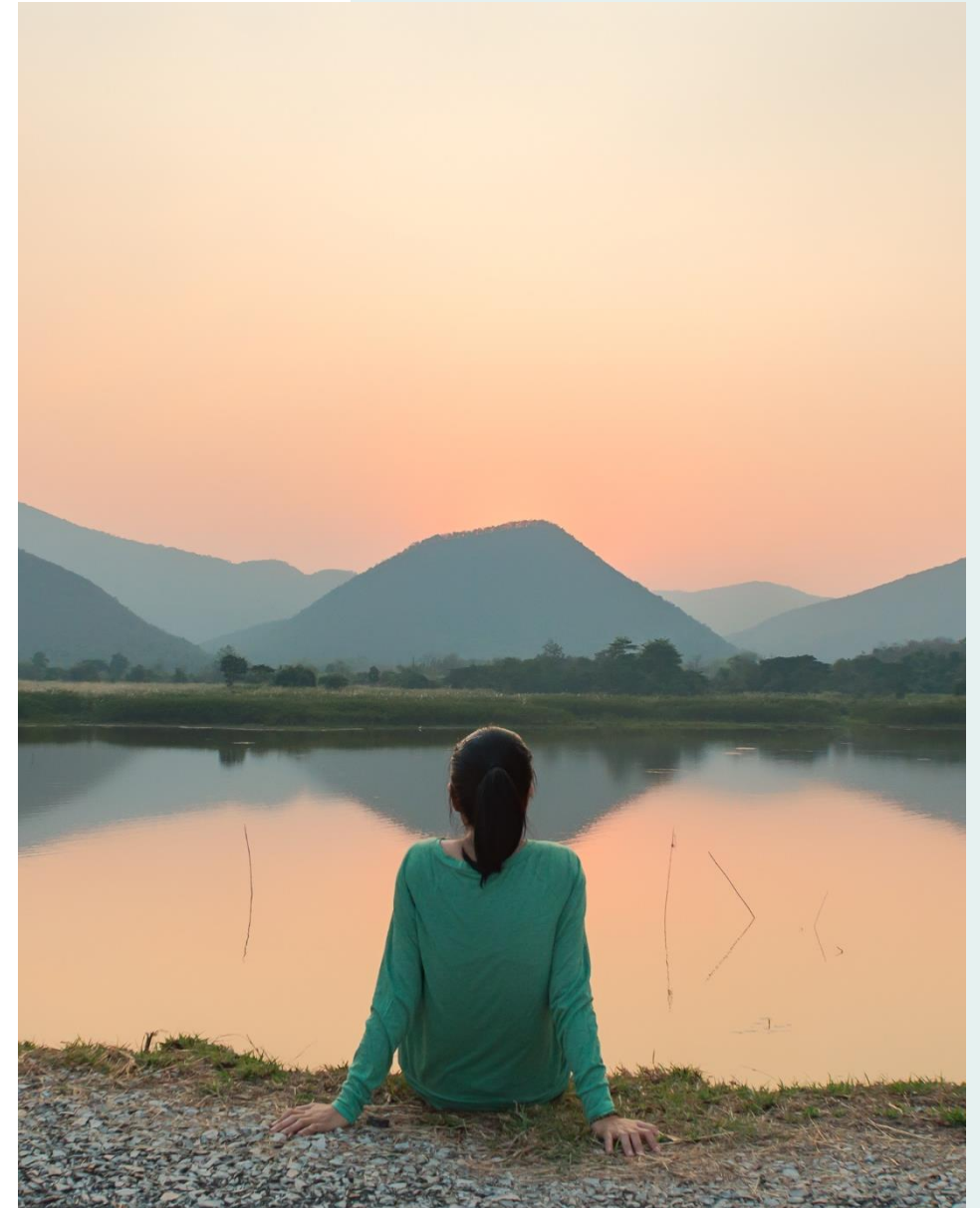
*“We’ve all had a year to evaluate if the life we’re living is the one we want to be living.”*

– Christina Wallace, Senior lecturer at Harvard Business School



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# A NEW ERA IS EMERGING

This is not only about shopping behaviors or daily habits.

It's a fundamental shift in approach to assessing what matters.

45%

The pandemic has made me want to re-evaluate how I want to live my life

52%

Say their general outlook on life has changed



## THE GREAT RE-EVALUATION

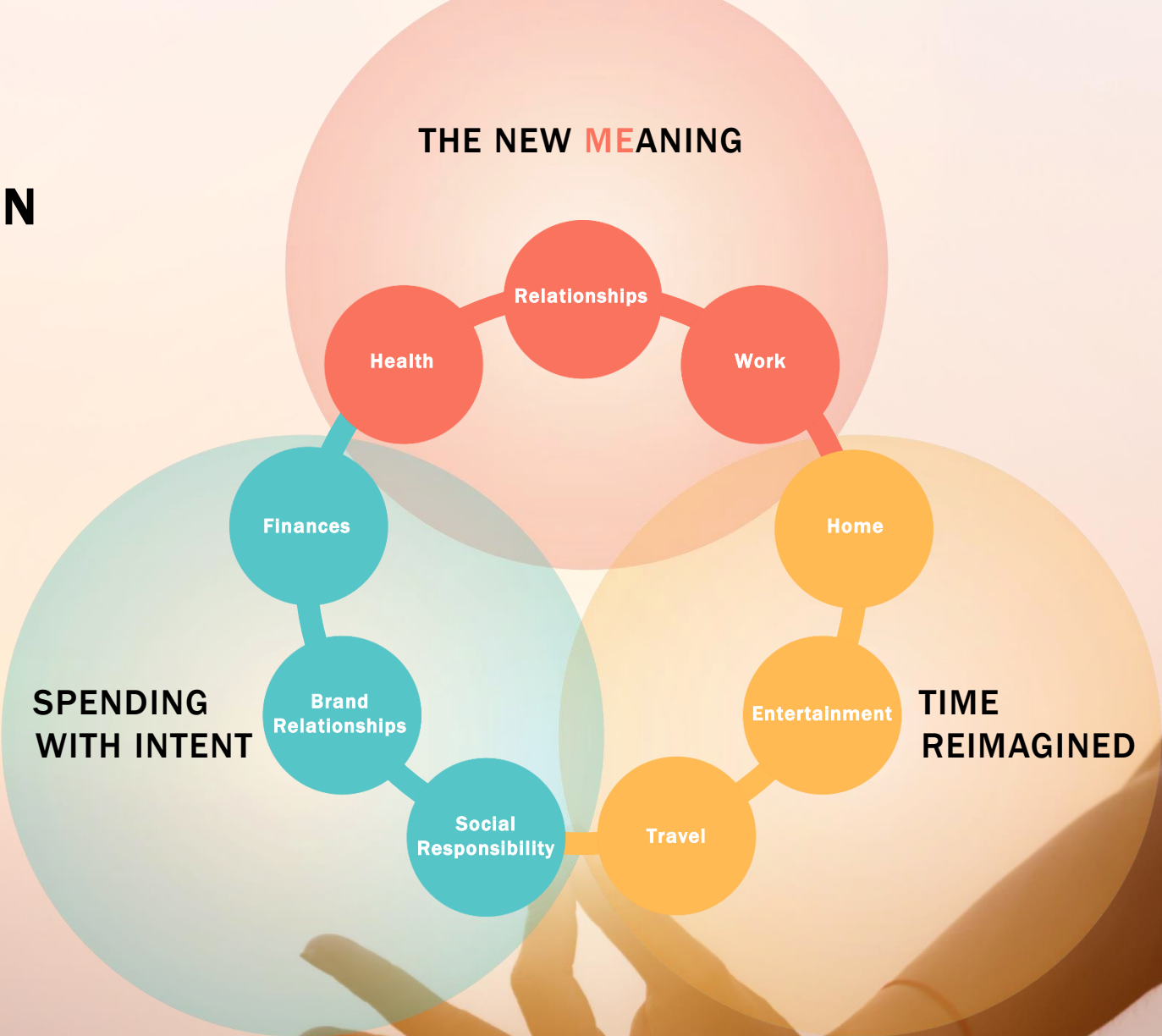
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**WHICH BRINGS  
US TO...**



A perspective which is  
now being applied to all  
facets of life.

# THE GREAT RE-EVALUATION



As we rebuild our lives,  
our choices are now looked  
at with a new sense of awareness

# AGENDA

01

## THE NEW MEANING

- Relationships Reframed
- Health Prioritized
- Work Rebalanced

02

## TIME RE-IMAGINED

- Homebase Rediscovered
- Entertainment Rewired
- Taking Back Travel

03

## SPENDING WITH INTENT

- Financial Health
- Brand & Category Relationships
- Social Responsibility

## 04 THE POLARIZING EXPERIENCE & SEGMENTATION

## 05 UN-PAUSE THE FUTURE

# 01 THE NEW MEANING



## THE NEW MEANING

A rare chance to pause and take stock gave Americans an opportunity to learn more about themselves and what they want from a life lived on their own terms.



## THE NEW MEANING

### Relationships Reframed

New focus on importance of  
self and quality relationships

### Health Prioritized

Evolving definitions  
of health

### Work Rebalanced

New freedom and  
flexibility levers

# MANY AMERICANS HAVE GONE THROUGH A PERIOD OF DEEP INTROSPECTION

People were forced to move all activity into private isolation and unexpectedly found themselves with time and space to explore identity and individuality.

**70%**

said lockdown gave them a chance to learn more about themselves

**35%**

said they will never be the same person again

**Only 15%**

said 'I have not changed over the last year and a half'

*"I'm certainly more aware of each day now, and certainly aware that it can be taken away at any time"*

*- Mary Ellen, 48, Florida*



## AND HAVE FOUND A NEW FORM OF SELF-CONSCIOUSNESS AND RECOGNITION OF THE IMPORTANCE OF 'SELF'

A more intentional, empathetic approach to oneself developed as people gained a heightened awareness and desire to prioritize the self, ultimately reevaluating what truly makes them happy.



People have started to seek out small moments of

**JOY**

---

**24%**

Plan to spend more time on “Me” next year vs now

## COVID-19 HAS ALTERED WHO PEOPLE SPEND THEIR TIME WITH AND WHICH SOCIAL CONNECTIONS THEY VALUE

Following an enforced isolation, many have reconsidered social ties – signaling a shift in quality over quantity within relationships

**42%**

Covid-19 has changed how I spend my time and who I spend my time with

**46%**

I value my friends / family more after the pandemic

The majority of Americans didn't mind spending time with fewer people.

**32%**

Missed spending time with groups of people

**40%**

Didn't mind spending time with fewer people

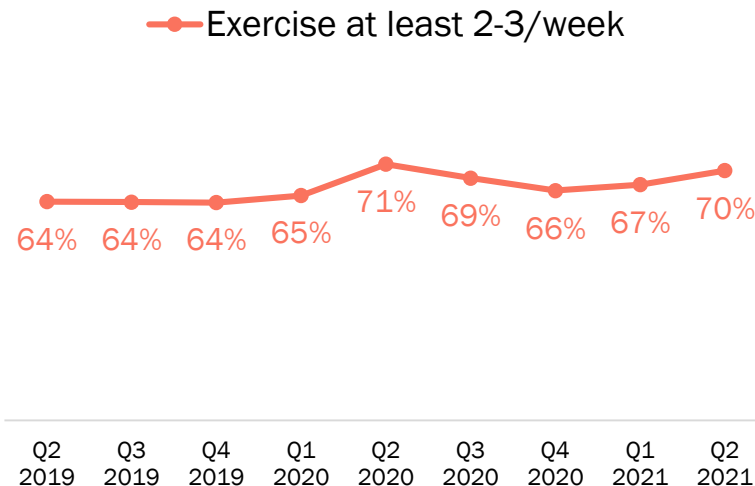
## THE PANDEMIC ALSO ENABLED SOME AMERICANS TO SHINE A SPOTLIGHT ON BOTH THEIR PHYSICAL & MENTAL HEALTH

As re-evaluation took place, health moved up the agenda – an advantage felt especially among those who WFH

**48%** The pandemic has made me take my health more seriously

**44%** of those WFH are exercising for at least 30 minutes a day (vs 29% of those who never WFH)

The percentage of Americans who exercise regularly increased vs. pre-pandemic



Mental health also came to the forefront and new spaces for discussion opened up

**22%** said their mental wellbeing changed for the better

**30%** said their mental wellbeing changed for the worse

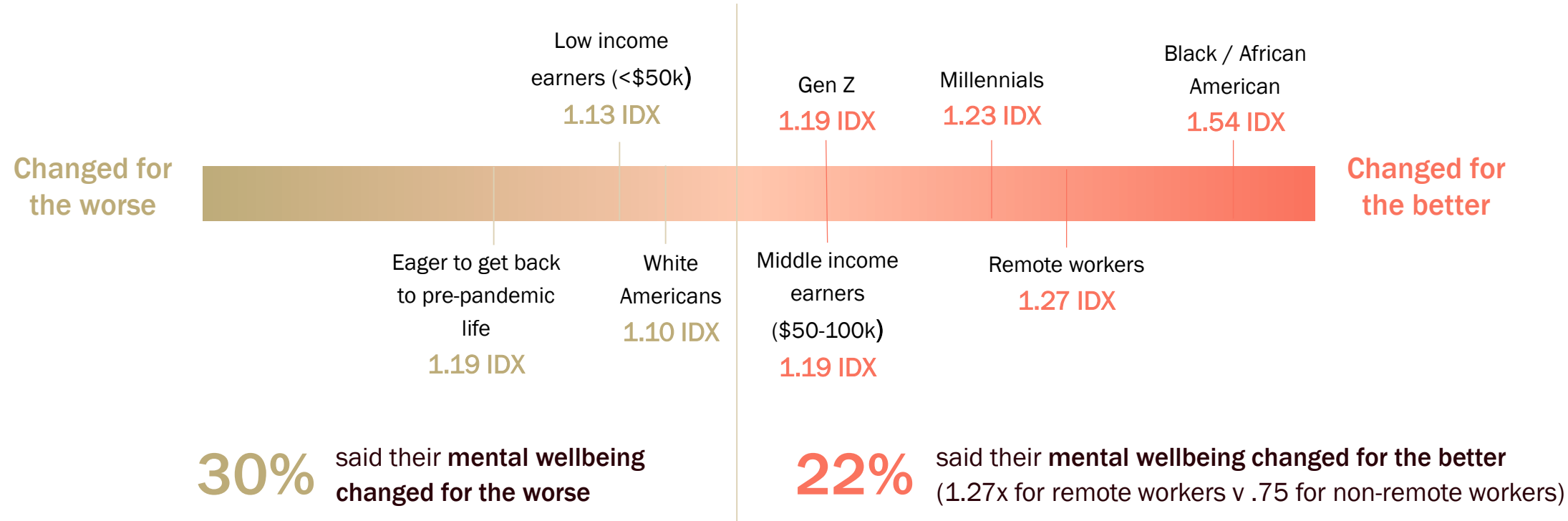
*“One of the biggest changes that I have made is more emphasis on my personal mental health. I’m trying to be compassionate with myself and also get help when I need it.”*

– Matthew, 41, New Jersey



# AMERICANS ARE EVOLVING DEFINITIONS OF HEALTH AND SUCCESS, BRINGING MENTAL HEALTH INTO THE PICTURE

## Mental Health



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## AMONGST THE RESET, PEOPLE HAVE AN ENHANCED DESIRE TO MAKE POSITIVE WORK CHANGES AND GAIN MORE FULFILLMENT AND PURPOSE THROUGH THEIR JOBS

For many, positive work-life changes are being made, especially those with higher income. People don't want to lose the newfound time and freedoms such as not commuting and getting more sleep.

*"I don't think people are going to work as hard as they used to. They want to value their time on the Earth"*

– Bryan, 49, Florida

For many, there is now a desire not to return to rigid work conditions but instead find balance and a purposeful career commitment.

47%

of people say that working during the pandemic **has made them reconsider if they're in the right job\***.

*"I realized that money isn't really what it's about for me anymore. I realize I need to find a position, a place to work where it would be inspiring, instead of just economically supportive."*

- Jennifer, 31, Maryland

## THIS NEWLY GAINED SENSE OF AWARENESS CAUSED MANY TO RECONSIDER WHAT MATTERS

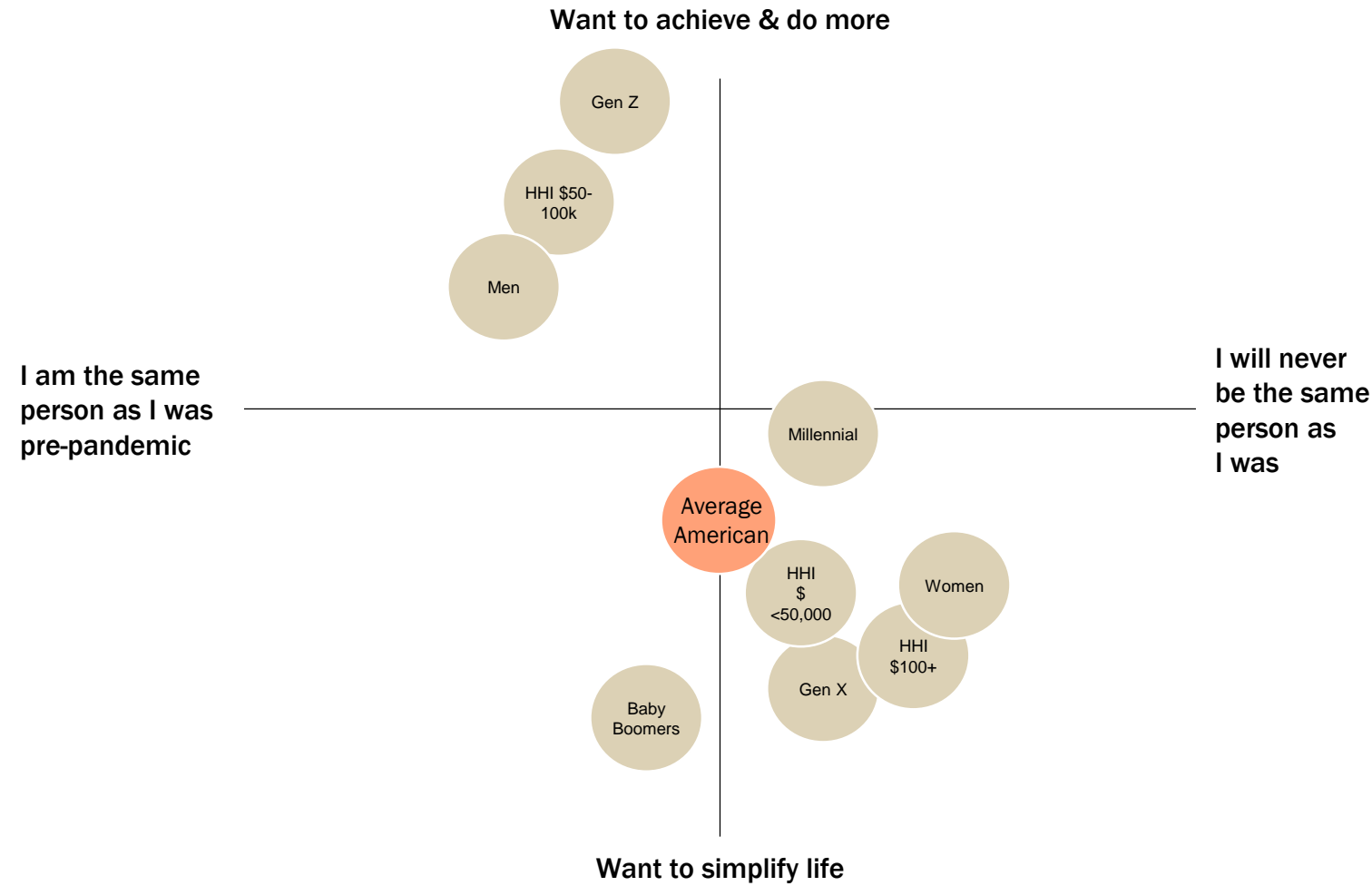
**29%** say Covid-19 has made them want to **do so much more with their life**

**37%** say Covid-19 has made them want to **simplify their life**

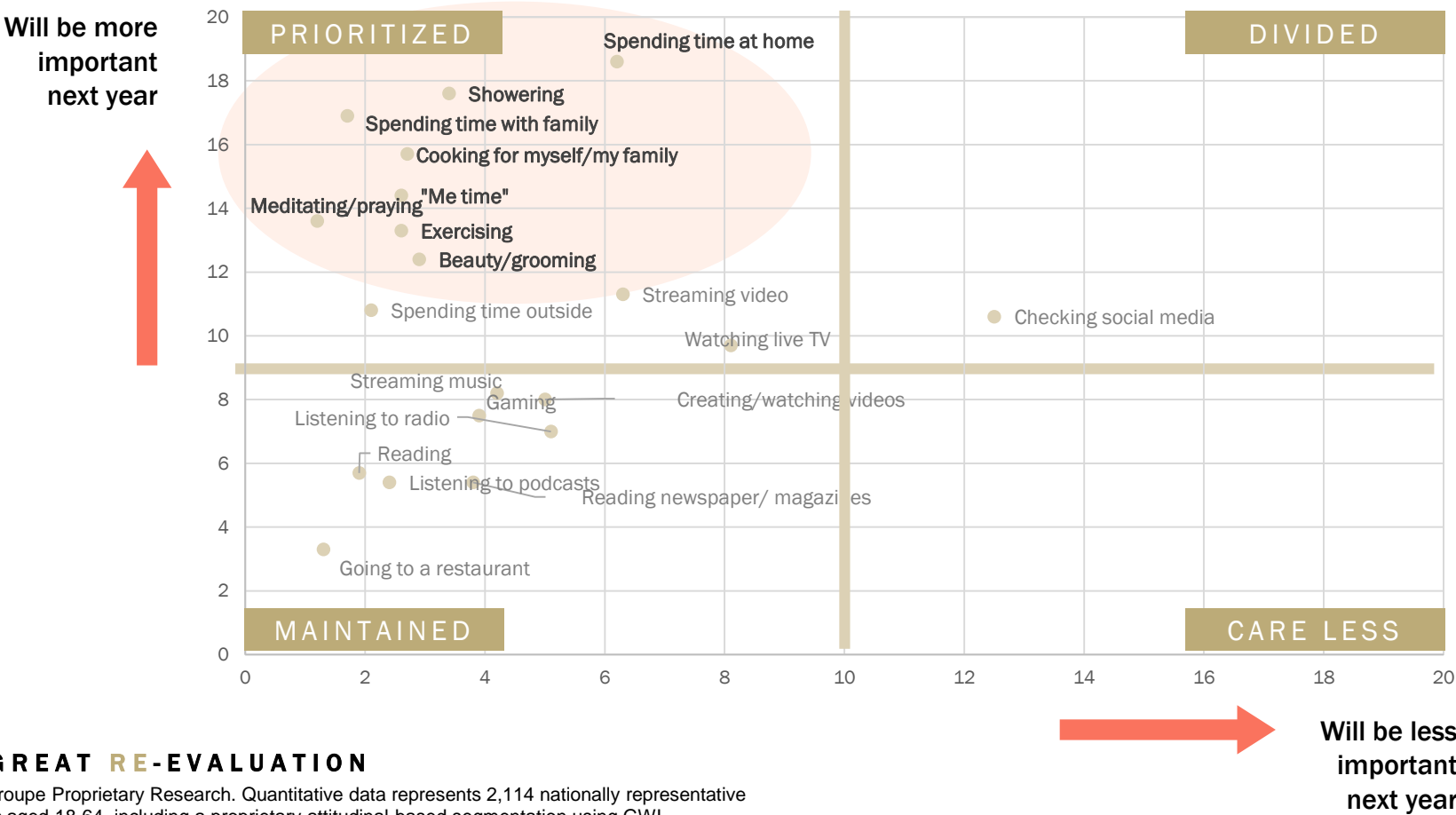


DIFFERENCES  
EMERGED ACROSS  
DEMOGRAPHICS,

But a clear skew towards  
a simplified life is now  
the reality



THIS FOCUS ON ‘ME’ AND A SIMPLIFIED LIFE LOOKS TO BE A LONG-TERM CHANGE.



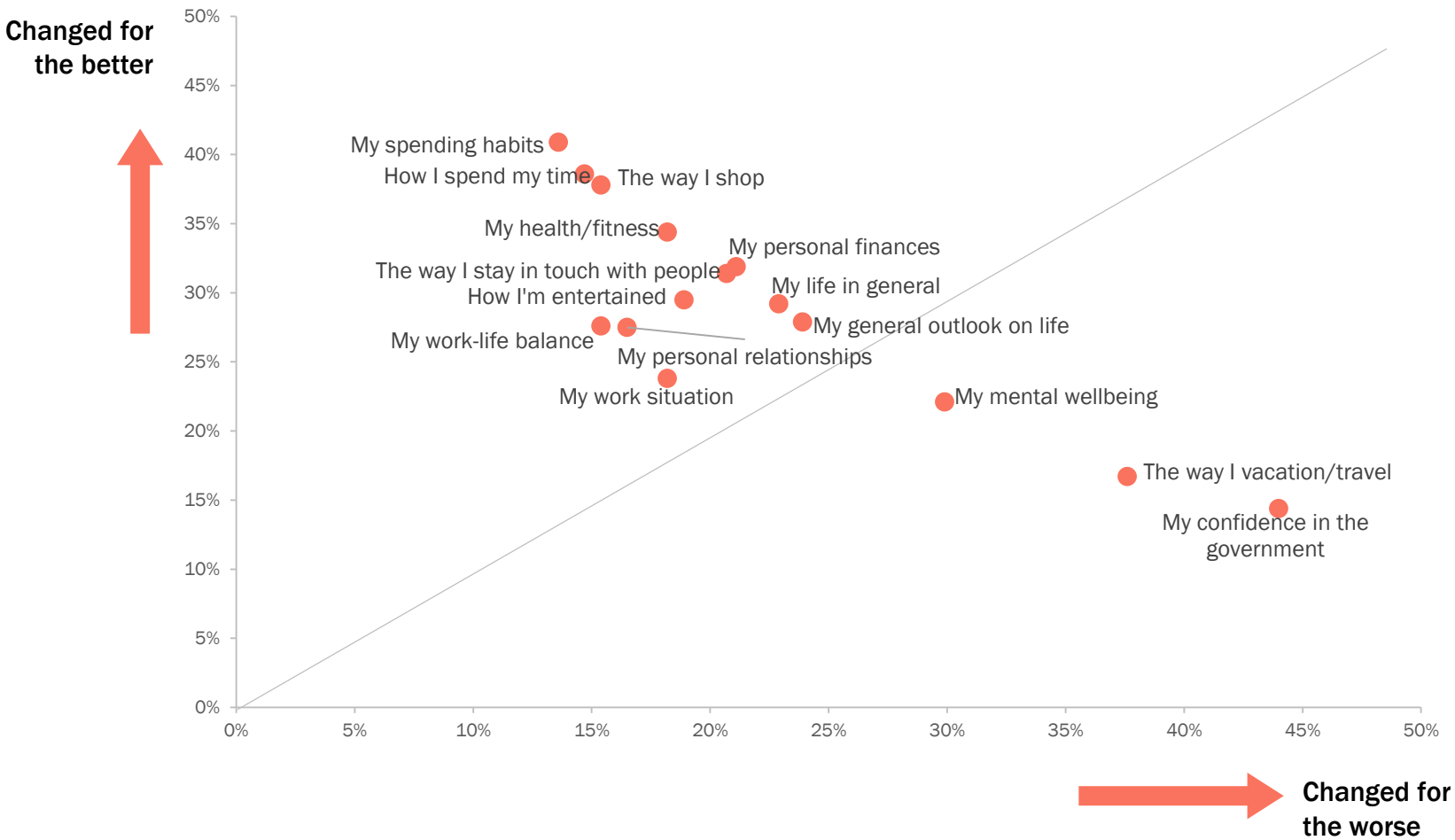
THE NEW MEANING

AND DESPITE THE HARDSHIPS WE'VE LIVED THROUGH,

Many feel that most aspects of our lives have actually changed for the better.

*"The pandemic has helped me create order."*

- Elizabeth, 36, Texas



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PEOPLE ARE NOW LOOKING FOR...

1

A LIFE SIMPLIFIED

While people have found this time to be challenging, they also had a chance to step back, evaluate, and realize that a simpler life is the way to a happy future.

2

MICRODOSES OF HAPPINESS

A new form of self-consciousness has emerged with a focus on self, health and wellbeing. As people get busier again, they will be looking for shorter, more achievable ‘me-moments’ in their day.

3

A YOLO ECONOMY

As a means of protecting their new identity and sense of freedom, people are seeking out more flexible routines and work models that give them better work-life integration.

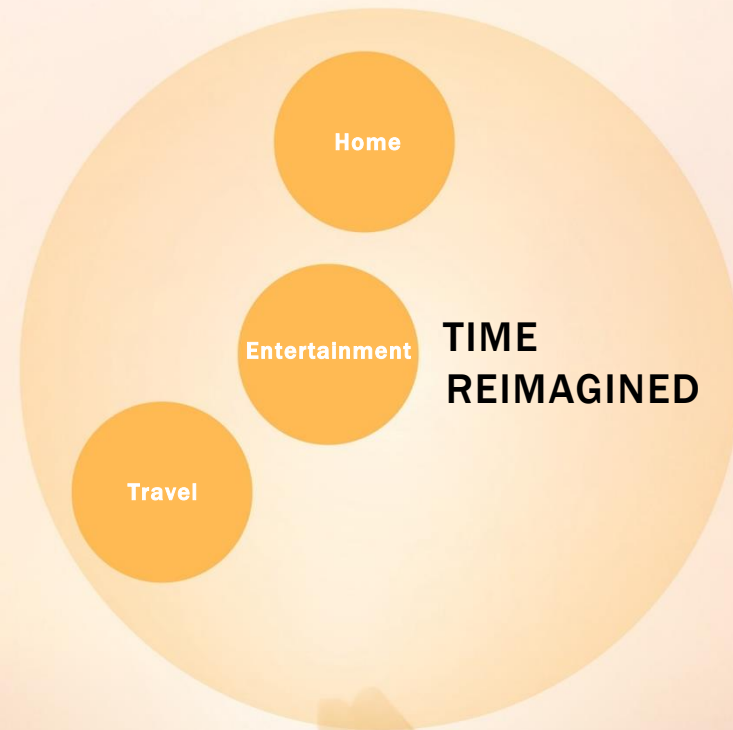
THOUGHTS FOR BRANDS

How can your brand assist people as they look to maintain and extend their newfound simple life?

What micro doses of happiness can your brand provide as people look to safeguard personal wellbeing?

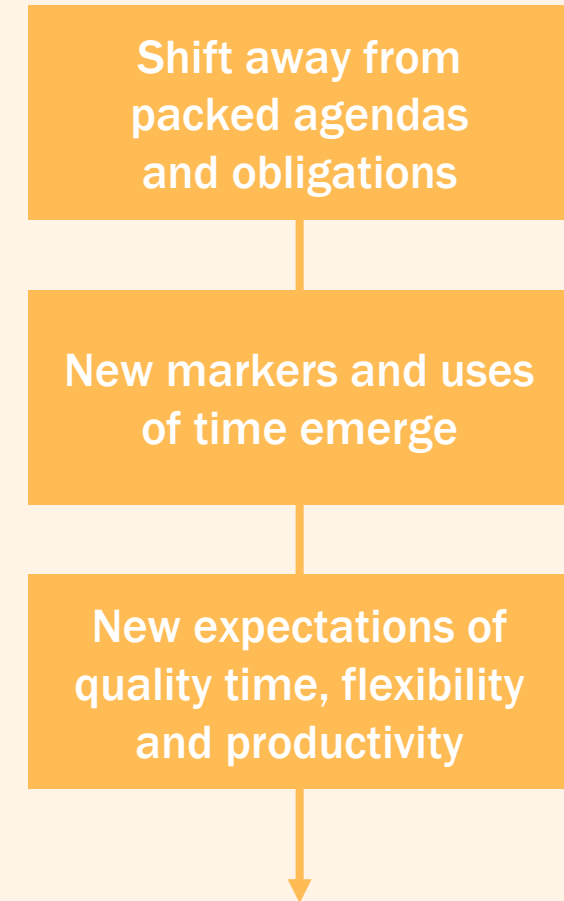
How does your brand activity power Americans looking to do things on their own terms?

# 02 TIME RE-IMAGINED

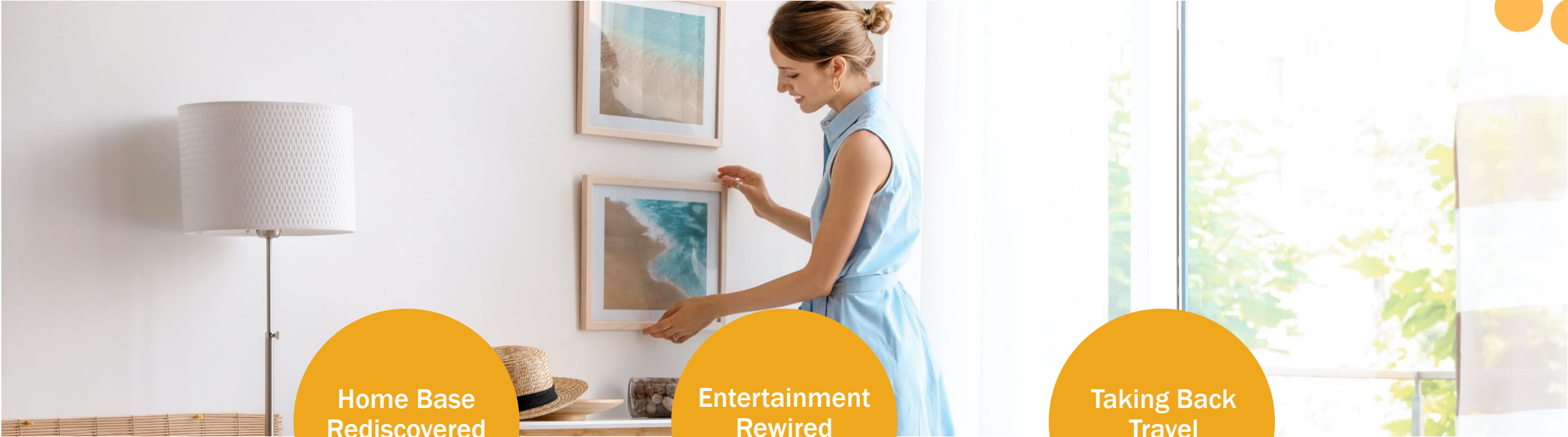


# TIME RE-IMAGINED

The pandemic has transformed how people imagine, value, and spend time. People had a chance to slow down, and many realized the importance of balance. This has led to new expectations from the activities they do choose to spend time with, and the role they play in people's lives.



TIME RE-IMAGINED



Home Base  
Rediscovered

The demand for downtime

Entertainment  
Rewired

Shifting preferences

Taking Back  
Travel

Splurging to experience



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## AMERICANS HAVE BECOME MORE PRECIOUS WITH THEIR TIME AND MORE AWARE OF THE VALUE EXCHANGE

47%

Covid-19 has made me rethink my priorities and made me more precious with how I spend my time

39%

The pandemic has changed the way I spend my time for the better

*"People have definitely cut off some of the stuff they wasted their time doing and realized that it wasn't worth it."*

*- Abe, 21, New York*



## EVEN WITH ITS CHALLENGES, LIFE AT HOME BECAME A SANCTUARY— WITH EVERYTHING PEOPLE COULD NEED AT THEIR FINGERTIPS—AND A NEW-FOUND APPRECIATION FOR ‘SLOW’ TIME WAS DISCOVERED

As time slowed down, people did too, giving many the opportunity to find balance in their hectic lives and focus their energies on the things that matter most.

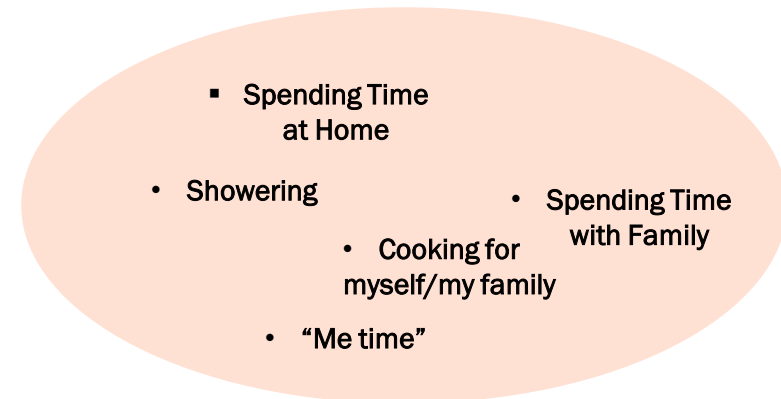
**This is a shift in priorities they want to hold onto.**

*“People got to value home time more. Some people thought they couldn't live without going out. People really understood the value of just having that time for yourself.”*

- Elizabeth, 36, Texas

With a heightened sense of importance, Americans plan to continue spending even more time at home in the coming year

Will Be More  
Important  
Next Year



Will Spend  
More Time  
Doing This  
Next Year

## THE FORCED ISOLATION AT HOME HAS ALSO SHIFTED THE ROLE OF ENTERTAINMENT IN OUR LIVES

Many found refuge and community in front of a screen, and for some there's no longer a need to leave the home to be entertained

**27%**

Plan to watch new releases at movie theaters in the future

**44%**

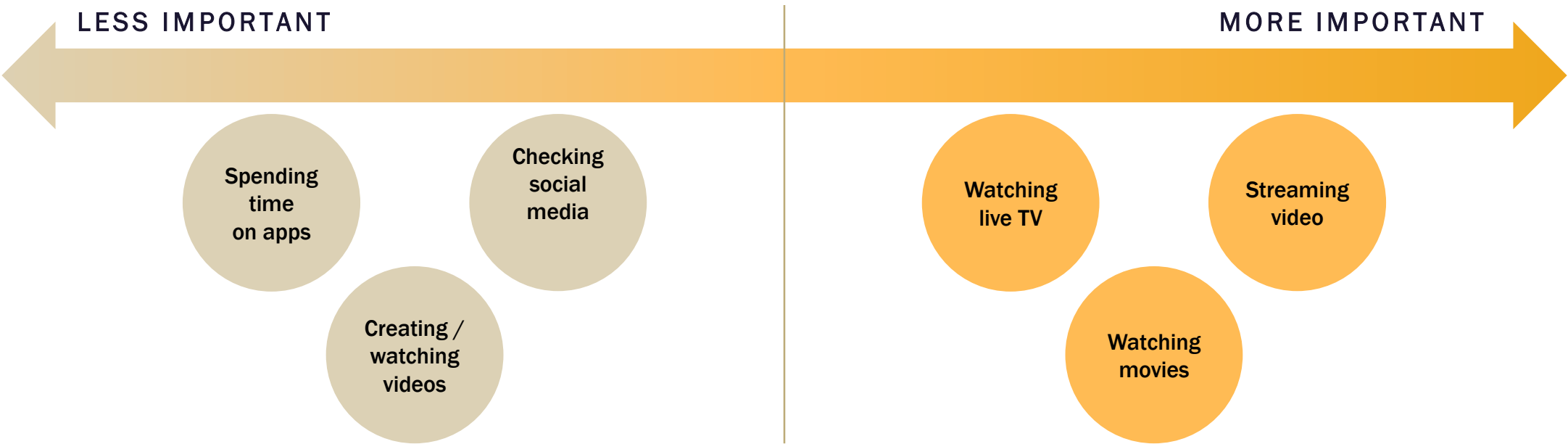
Content watching new movie releases at home

In contrast, 40% of heavy streamers plan to watch new releases in the theater.



# ENTERTAINMENT HAS BECOME MORE ‘LEAN-BACK’ THAN ‘LEAN-IN’ AS CONSUMERS FAVOR ESCAPISM AND RELAXATION OVER SOCIAL CONTENT CURATION

Estimated future importance of activities in Summer 2022



## THE RELATIONSHIP WITH SOCIAL MEDIA IS MORE COMPLEX THAN BEFORE

*"The only reason I now go on social media is to look for inspiration. I usually post, I'll scroll, but I don't really care to see what other people are doing. I post about the things that interest me, but don't engage in really anybody else's."*

- Erin, 23, New Jersey

*"I'm always on social media. Even when I'm working, I'll take a little three-minute break just to look at social media and see what people are doing right now. It is like escaping to me, honestly. It gets my brain off everything in the house. Sometimes I lock myself in my room and I'm on Instagram*

*or Tiktok, and all of a sudden, I see this random person that's all the way in Greece, the views and food and it takes me away from everything, honestly."*

- Braulio, 30, New York

**22%**

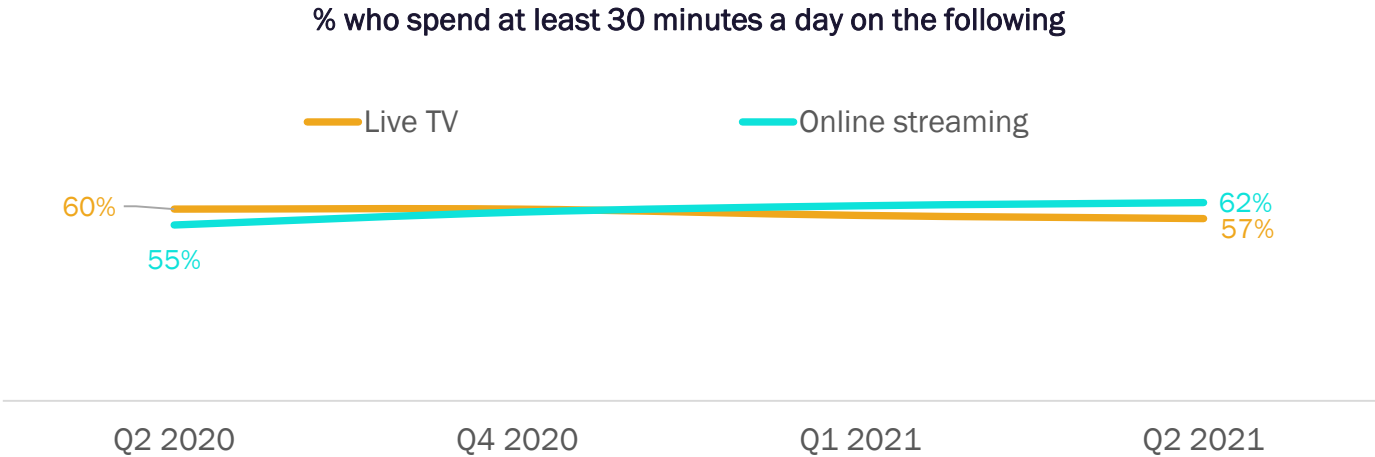
Think they will spend more time on social media in the future

**37%**

Want to reduce the amount of time spent on social media

This differs for Gen Z, with 40% saying they will spend more time on social media in the future

STREAMING SERVICES BECAME A TOOL OF SURVIVAL DURING LOCKDOWN. REALIZING ITS VALUE, AMERICANS HAVE NO PLANS TO DO WITHOUT.



*“I feel like a lot of these [streaming apps] have helped us a lot, because we survived through them. They helped us being home.”*

- Erin L, 23, New Jersey

83%

say they will spend the same or more time streaming content in a year’s time

37%

say they couldn’t live without TV streaming services now



THE GREAT RE-EVALUATION

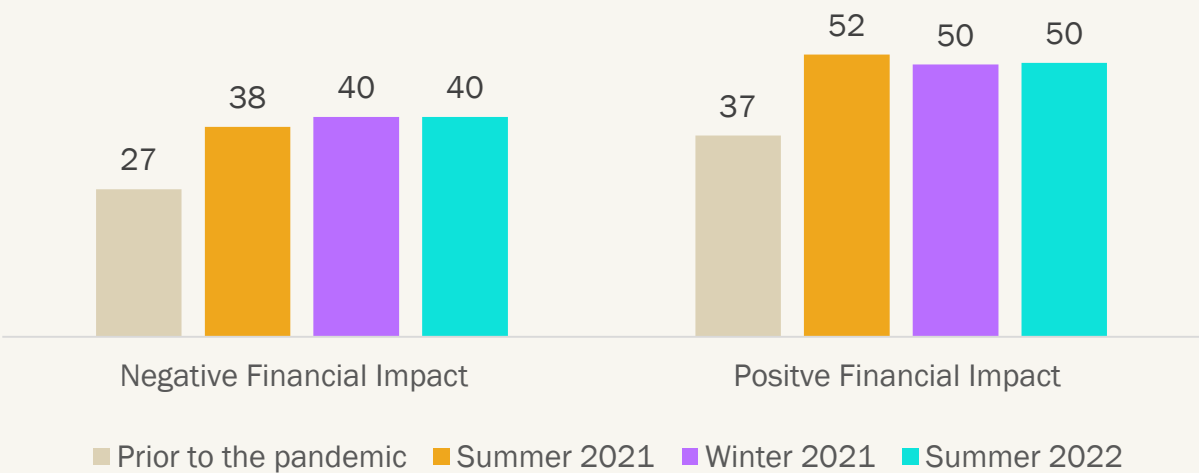
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# STREAMING IS HERE TO STAY, AND EVEN FINANCIAL SITUATION HAS NO IMPACT ON FUTURE INTENT TO UNSUBSCRIBE, WITH SOME SEEING IT AS AN OPPORTUNITY TO SAVE

The number of streaming subscriptions grew over the pandemic and these subscriptions will be maintained, regardless of financial impact

% Subscribed to at least 4 or More Streaming Services



*“Disney will put out a movie and instead of going to the movie theater, you can watch it at your house. So, we were like well, normally, we'd take our kids to go see this cartoon but it would cost us 50 or 60 dollars. But now I can just do Disney Premier access for 34, so I'm saving money”*

- Eric, 36, Georgia

Nearly half of streamers have no plans to change what they spend on streaming, and a sizeable amount are even planning to spend *more*

47% Plan to make no changes to how much they spend on streaming services

22% Plan to spend more on streaming services in the future



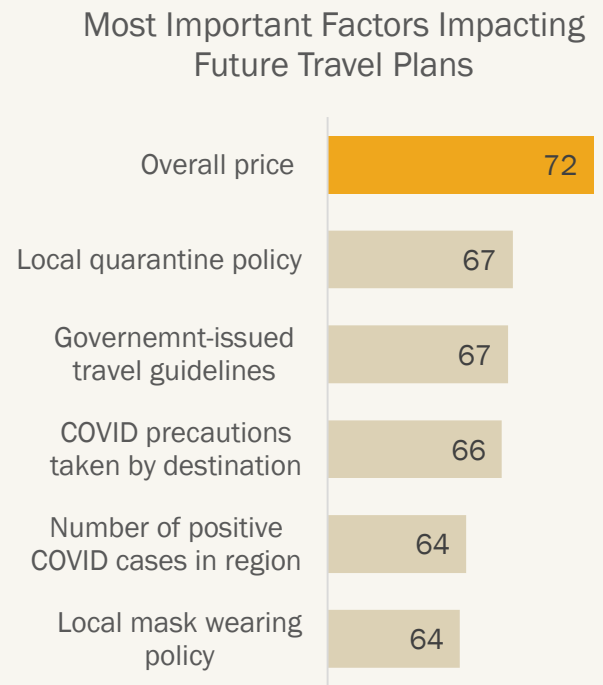
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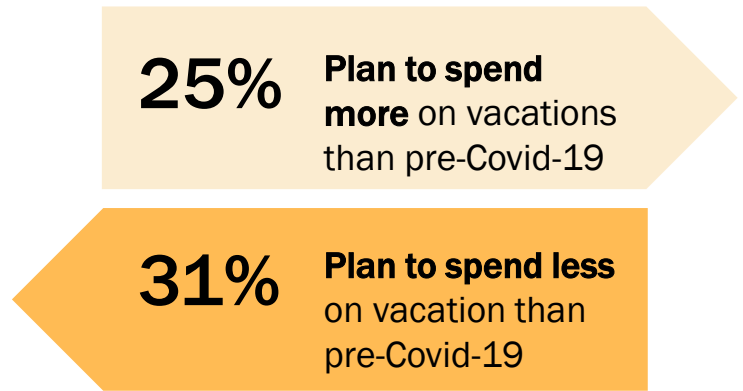


# DESPITE FINDING REFUGE IN THE HOME, AMERICANS ARE STILL EAGER TO SET OUT AND TRAVEL IN THE COMING YEAR, BUT WITH SHIFTS IN MOTIVATION AND PREFERENCE

Road trips and national park vacations are the only trips which did not decline in interest from pre-pandemic, indicating a lingering hesitation; though price, unlike Covid-19 related factors, remains the most influential factor impacting future travel



Americans appear divided on what they will spend, but it's the KIND of vacation that people are comfortable paying for that's being reconsidered.



*"I'm more relaxed with spending money on experiences... Now I think that the experiences matter. I don't think my kids are going to remember when I had a motorcycle, instead, they will remember that we went to the mountains and hiked and kayaked."*

- Bryan, 49, Florida



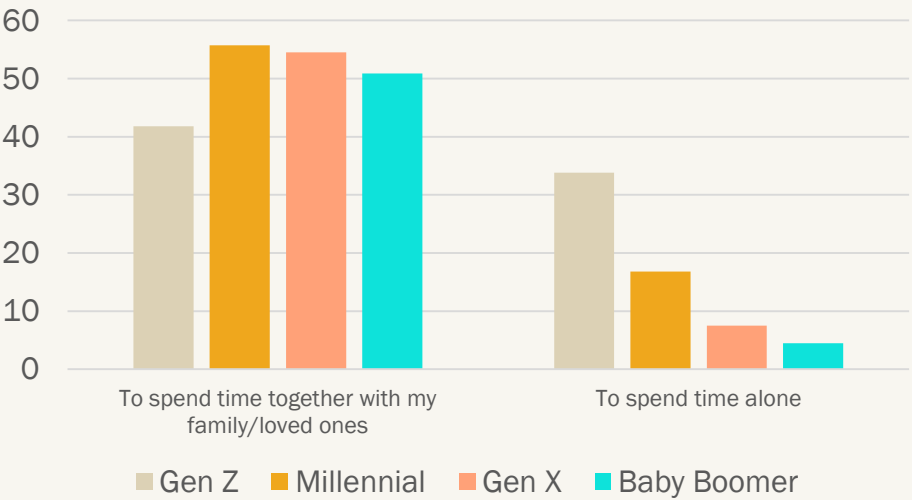
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# THOUGH LIFE IN QUARANTINE POSED PLENTY OF TRAVEL RESTRICTIONS, THE FUTURE OF TRAVEL WILL BE ABOUT TAKING THAT EXPERIENCE BACK

While travel desire for older Americans is linked with spending time with loved ones (whether to reconnect or extend existing time together), for Gen Z its an opportunity for time alone

What is your primary reason for taking a vacation in the next 12 months?



Travel in the future shows a shift toward more intentional travel, with an emphasis on new preferences and behaviours

## TRAVEL PRE-COVID-19

- ✈ More likely to travel both **locally** and **internationally**
- ✈ More likely to vacation in a **major city** (relative to future vacations in the next 12 months)
- ✈ More **spontaneous travel**

## TRAVEL IN THE FUTURE

- ✈ **Longer** trips, with maintained interest in road trips and National Parks
- ✈ New focus on **bucket list** destinations, especially for younger groups
- ✈ 21% of remote workers says they'll **travel more often** (vs 11% of non-remote workers)
- ✈ Greater **willingness to splurge** among those who plan to travel in the next 12 months



PEOPLE ARE NOW LOOKING FOR...

1

GREATER VALUE  
FROM THEIR TIME

People have come to appreciate stripped back routines and are looking for ways to protect this new found balance. They want more flexible and individualized ways of structuring their time and getting the most from it.

2

HOME BASE FOR  
ENTERTAINMENT

As people took refuge at home, their love affair with in-home entertainment and streaming blossomed and became a vital component of quality time. As we move beyond the pandemic, people will continue to enjoy homely pleasures.

3

ELEVATED  
DOWNTIME

With deeper pockets after lockdowns, people who have saved are ready to spend in order to elevate their experiences. Tired of deferring joy to a later date, people are looking to elevate the moments that matter.

THOUGHTS  
FOR BRANDS

What actions can your brand take to help people protect their newfound balance and get more from their time and experiences?

What are the opportunities for your brand to evolve and extend Covid-19-era at-home entertainment as people continue to nest?

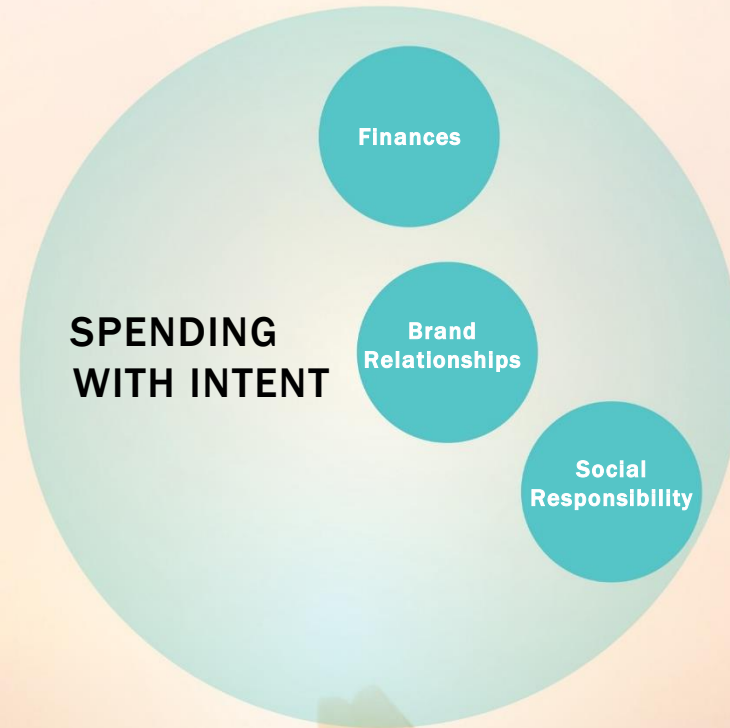
How can your brand tailor its offer to lockdown savers who are ready to elevate their post pandemic experiences?



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# 03 SPENDING WITH INTENT



## SPENDING WITH INTENT

Economic uncertainty and increased introspection brought about a radical reassessment of spending habits, from the more obvious shift to online grocery shopping to the less obvious use of pandemic savings to pay off debts.

Yet while life changed for everyone, the ways Americans were individually hit differed, resulting in polarized attitudes to spending. Overall, the vast economic and social impact is leading Americans to re-evaluate value itself.

Impulsive and in-person  
spending stopped

Awareness of accrued  
savings grew

New understanding  
of value



# SPENDING WITH INTENT



Accidental savings & thoughtful spending



Winners, losers & transformations



Spending where it matters

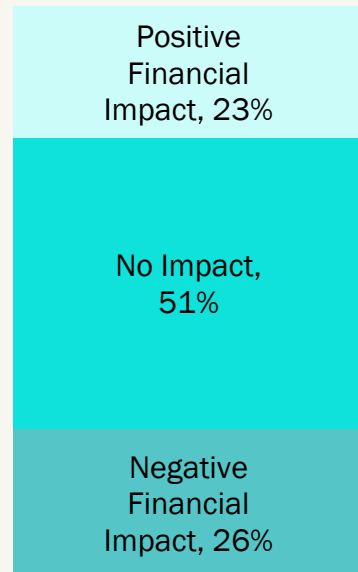


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## FALLING INTO FINANCIAL HEALTH - THE PANDEMIC ENABLED PEOPLE TO BECOME ACCIDENTAL SAVERS

Although people were impacted differently, most Americans (74%) saw a positive or no impact on their finances



**41%**

I generally saved money during the pandemic

**41%**

The pandemic has changed my spending habits for the better (vs. 14% for the worse)

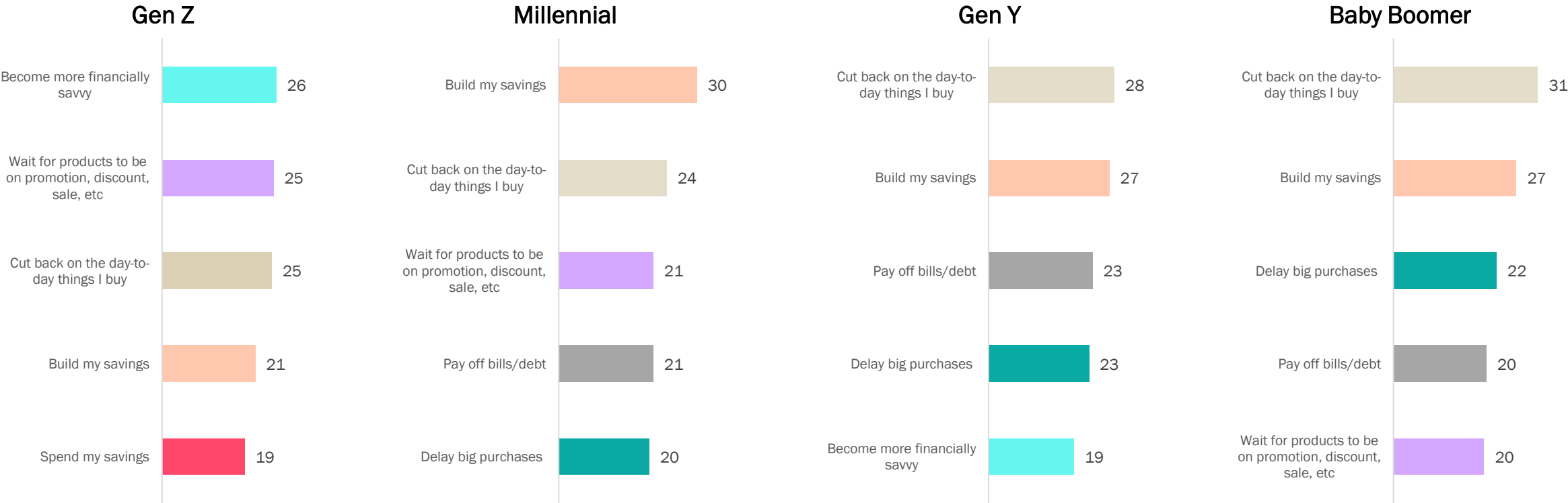
*"Personally, I realized how much money I can save if I sit at home. And I really realized that if you're more focused on one thing at a time, you can accomplish many things. For example, I was able to pay off several credit cards last year because we weren't able to go anywhere."*

– Danielle B, 38, Missouri



ACROSS GENERATIONS, AMERICANS RESET THEIR FINANCES BY CUTTING BACK AND BUILDING SAVINGS. FOR GEN Z, THE PANDEMIC WAS AN OPPORTUNITY TO STEP BACK AND BECOME MORE FINANCIALLY SAAVY – BUT THEY WERE ALSO MORE LIKELY TO SPEND.

Top 5 Financial Behaviors Due to the Pandemic



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## WHILE SPENDING IS STILL LOWER THAN PRE-PANDEMIC, IT IS SET TO COME BACK – BUT IT WILL BE MORE CAUTIOUS AND INTENTIONAL

Future spending habits are set to rebound to an extent

**42%**  
Will increase in  
next **12 months**

But Americans expect to be more cautious and intentional

**47%**

I am going to be more careful with my money just in case

**44%**

I've realized I don't need to spend as much money to enjoy life

ONLY  
**29%**

said they enjoy the novelty of shopping & buying new things now that everything is open

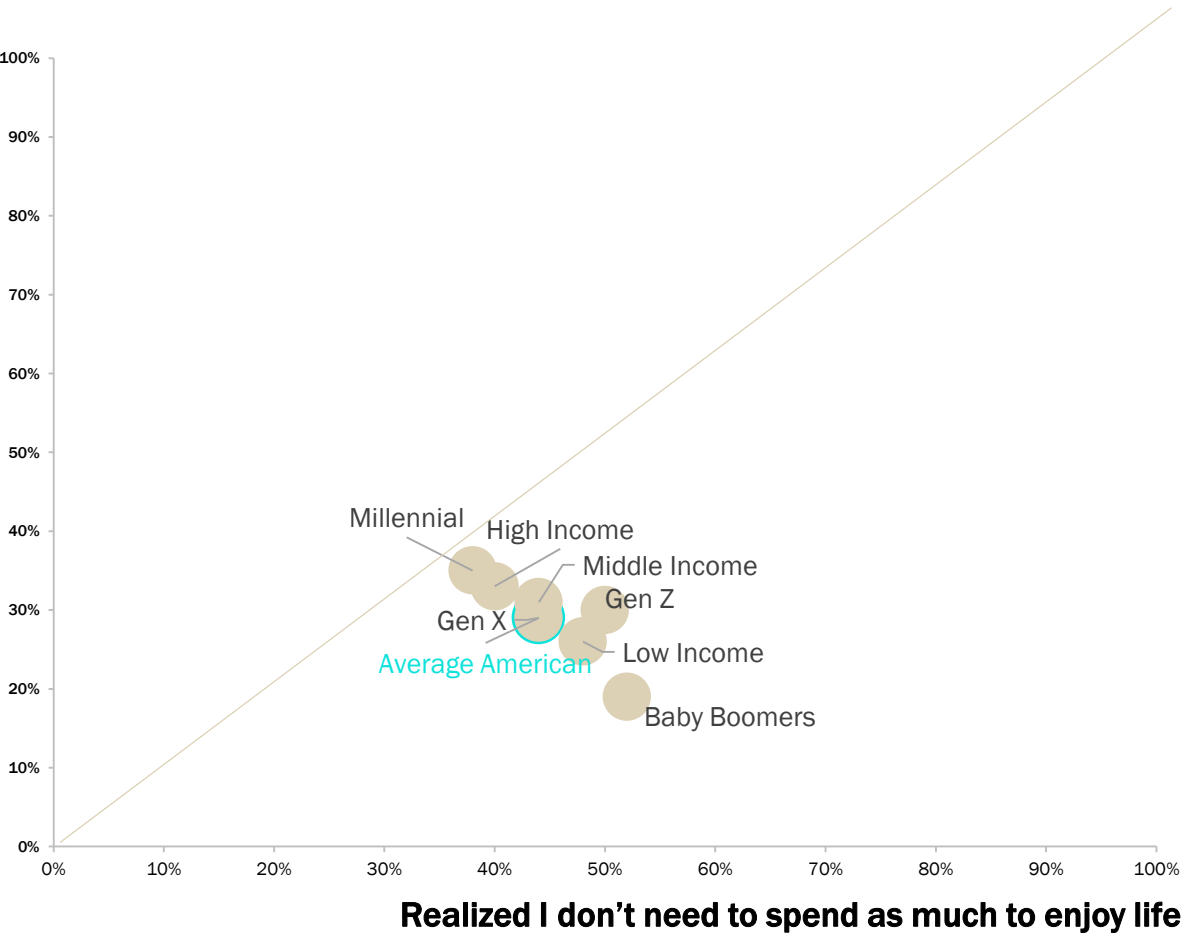
*"I watched a lot of YouTube videos about finances. Whatever spare time I had, I would watch videos and read articles on finances and how to improve myself. I did this so that, after the pandemic, I can help my family with our finances."*

– Elizabeth A, 36, Texas

THIS IS TRUE FOR ALL DEMOGRAPHIC GROUPS

As people realized that spending doesn't equate to happiness – some more than others

Enjoy the novelty of shopping & buying new things now that everything is open



# ENFORCED TIME AT HOME INEVITABLY CAUSED SOME AMERICANS TO CHANGE SPENDING HABITS

But people expect to resume spending in the most heavily hit categories over time.

PANDEMIC ERA SPENDING		FUTURE INTENTIONS	
<b>PAUSED</b> Spending <u>less</u> now vs. pre-pandemic	<b>BOLSTERED</b> Spending <u>more</u> now vs. pre-pandemic	<b>DECLINING</b> Expect to spend <u>less</u> in the future	<b>REBOUNDED</b> Expect to spend <u>more</u> in the future
RESTAURANT DINING	GROCERIES	FAST FOOD	RESTAURANT DINING
CLOTHING	EVERYDAY HOUSEHOLD ITEMS	ALCOHOL	TICKETS
TICKETS	STREAMING	HOME DÉCOR	CLOTHING

# AFTER A PERIOD OF ECOMMERCE GROWTH AND DEPENDENCY, IN-STORE REMAINS VALUED BY AMERICANS AND WILL LIKELY REGAIN GROUND

However, omni-channel retail is here to stay, particularly among younger demographics

PREFER TO SHOP INSTORE	PREFER TO SHOP ONLINE*
FUTURE	FUTURE
GROCERIES (78%)	CLOTHING (49%)
PERSONAL CARE ITEMS (77%)	PERSONAL ELECTRONICS (47%)
EVERYDAY HOUSEHOLD ITEMS (74%)	PERSONAL GROOMING (37%)
PERSONAL GROOMING (72%)	HOME DÉCOR (36%)
OTC MEDICINE (69%)	ATHLETIC WEAR (36%)

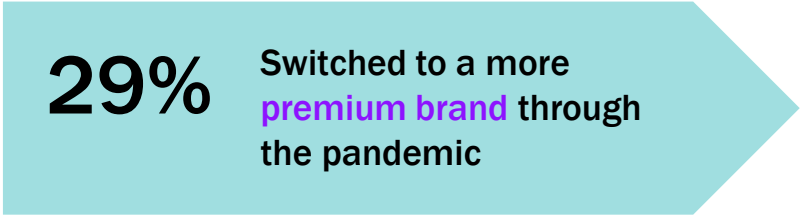
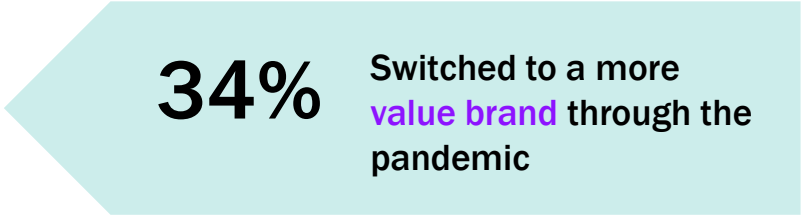
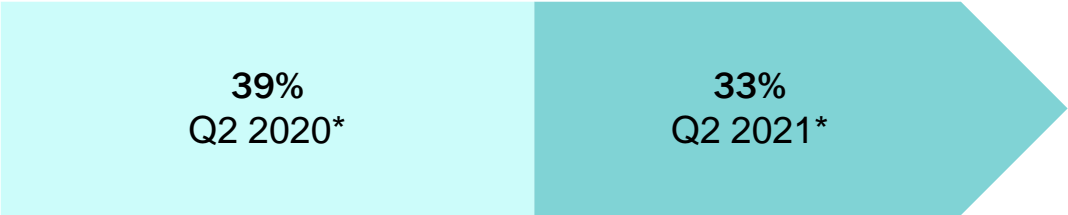
Categories that are about fulfilling an immediate need  
Stronger preference among older Americans

Categories that require more consideration  
Stronger preference among younger Americans

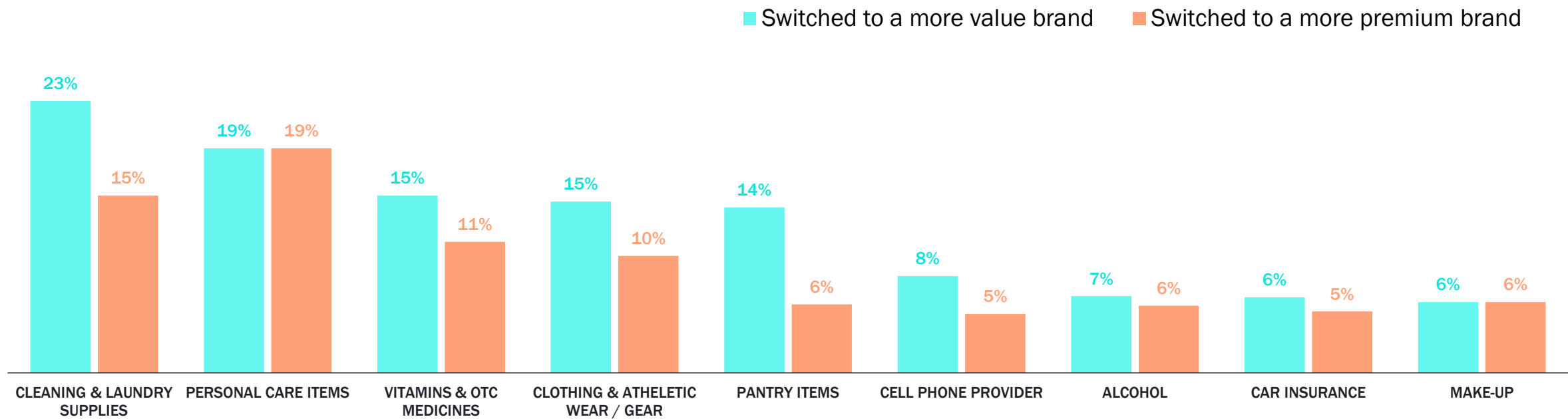
\*Online= Ordering via brand or retailer websites, via social media, delivery service/apps or subscription service

# BRAND LOYALTY DROPPED OFF THROUGH THE PANDEMIC AND MANY PEOPLE BECAME BRAND SWITCHERS

“I am loyal to the brands/retailers I like”

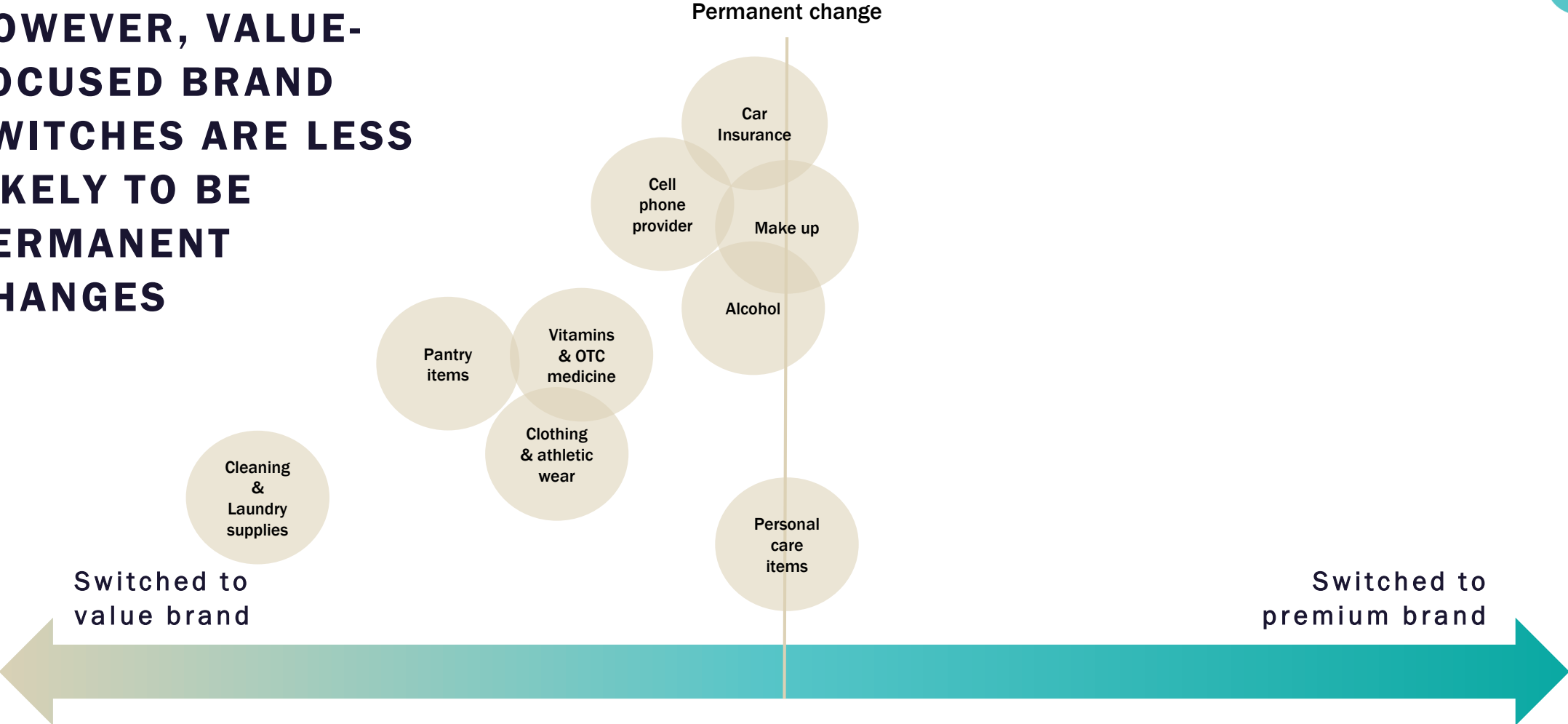


ECONOMIC UNCERTAINTY AND FALLING BRAND LOYALTY MEANT CONSUMERS WERE MORE LIKELY TO SWITCH TO CHEAPER PRODUCT LINES THAN PREMIUM ONES





**HOWEVER, VALUE-  
FOCUSED BRAND  
SWITCHES ARE LESS  
LIKELY TO BE  
PERMANENT  
CHANGES**



## BRANDS CAN WIN OVER INCREASINGLY CONSCIOUS CONSUMERS WITH INITIATIVES THAT SPEAK TO THEIR VALUES

**38%**

“I am more concerned about environmental sustainability than before the pandemic”  
*(vs. 20 who are less concerned)*

**37%**

“It’s important to me that brands support sustainable practices”

**4 in 10**

Americans are trying to make lifestyle choices that help the environment\*

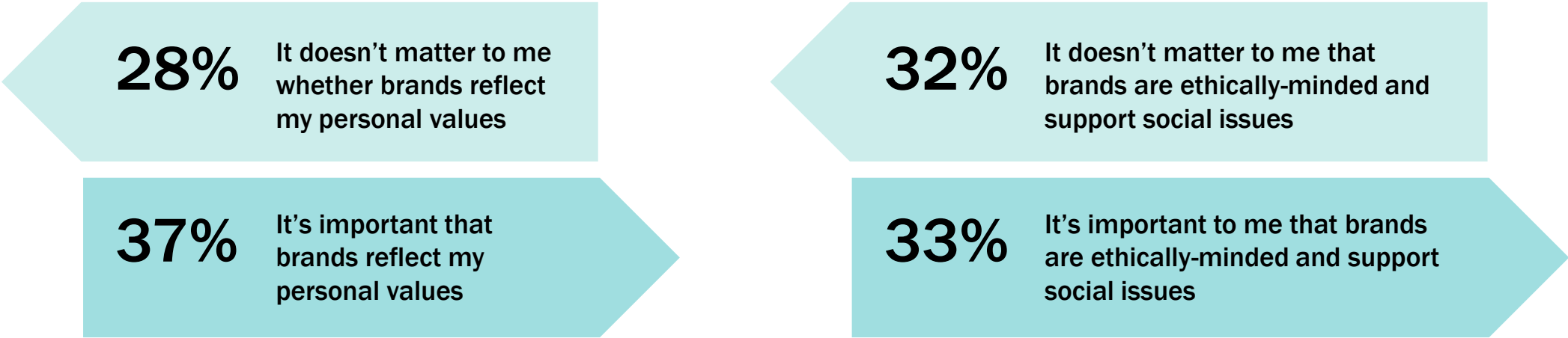
**4 in 10**

Want brands to be transparent about how products are made\*



HOWEVER, POLARIZATION APPEARS REGARDING THE IMPORTANCE OF BRANDS BEING ETHICALLY MINDED AND SUPPORTING SOCIAL ISSUES

People want their personal values reflected but are more polarized on the importance for brands to be ethically/ socially minded



## DIVERSITY & INCLUSION IS INCREASINGLY IMPORTANT TO AMERICANS -- WHILE 30% WANT TO SEE THEIR IDENTITY REFLECTED IN ADS, THEY'RE LESS LIKELY TO WANT THESE INITIATIVES EXPLICITLY PROMOTED.



44% of Americans say **equal rights** are important to them\*



35% say it's important that the brands they buy from support diversity and inclusion

28% of Americans want ads to be **relevant to them to their identity**

v 33% of Gen Z

16% of Americans want ads to **promote diversity & inclusivity**

v 22% of Gen Z

14% say ads **without** diversity / inclusivity would **negatively impact** their view of a brand

## SPENDING WITH INTENT

People are now looking for...

1.

### NEW MEASURES OF VALUE

Given the space to rethink and recalibrate spending, people have become more conscious of where their money goes. They now want to be more discerning with the value they receive from a purchase.

*Is your brand triggering a sense of revenge or regret as consumers look to juice more value from their spending?*

2.

### BRAND RELATIONSHIPS REFRAMED

After a massive period of upheaval, usual shopping behaviors were upended and consumer loyalty was questioned as shoppers traded up and down. As people indicate return to in-store shopping, they may reframe brand relationships once again.

*Is your brand prepared for a shift in brand preference as people start to change shopping habits again?*

3.

### MEANINGFUL CONSUMPTION

Given the social, political and economic events that took place during the pandemic, more attention has been given to conscious consumerism – evolving a long-term shift. While some inevitable polarization does occur, consumers – especially younger cohorts – will increasingly factor in ethical values as well as monetary.

*Does your brand strategy factor in meaningful social responsibility as part of the value exchange?*



#### THE GREAT RE-EVALUATION

Publicis Groupe Proprietary Research. Quantitative data represents 2,114 nationally representative Americans aged 18-64, including a proprietary attitudinal-based segmentation using GWI.

# A POLARIZING EXPERIENCE

While the pandemic era has touched every single life in some way - whether big or small, it was in no way a one size fits all experience. Many have walked away with polarizing views on what their life - and who they will be, moving forward.



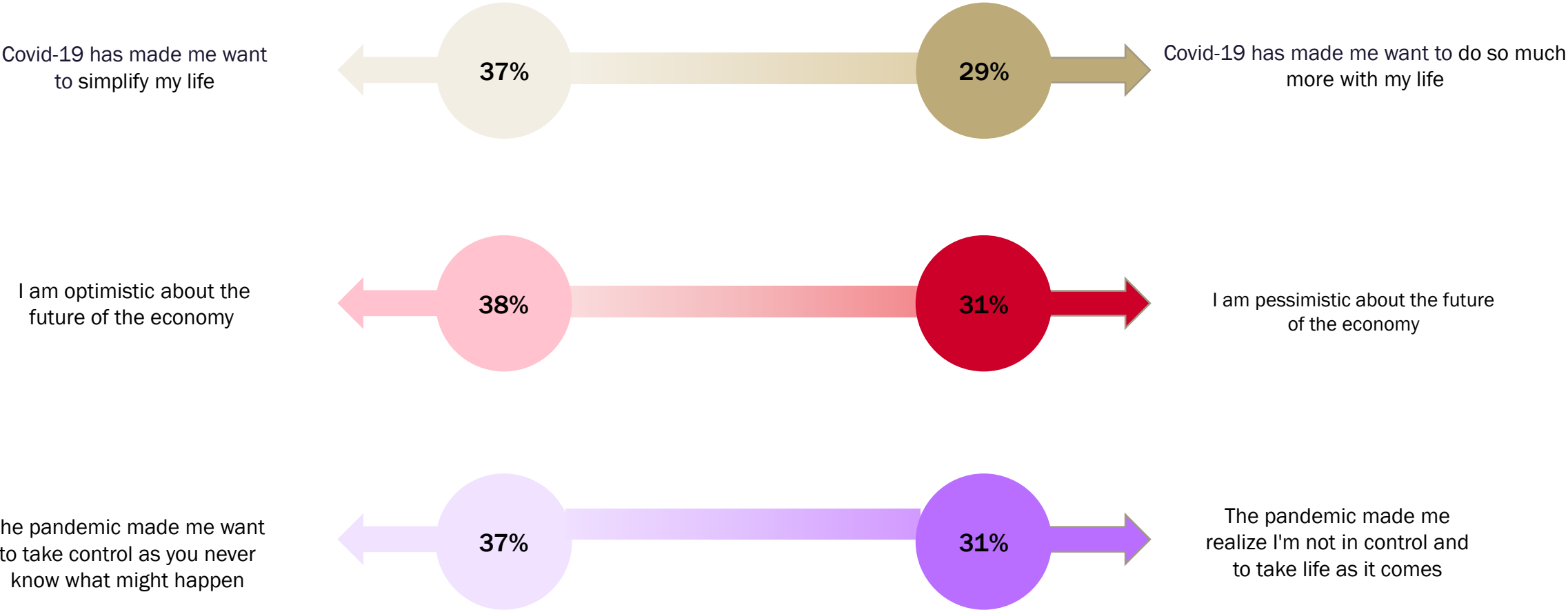
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A POLARIZING EXPERIENCE

Americans are going through this communal experience with different attitudes towards the future



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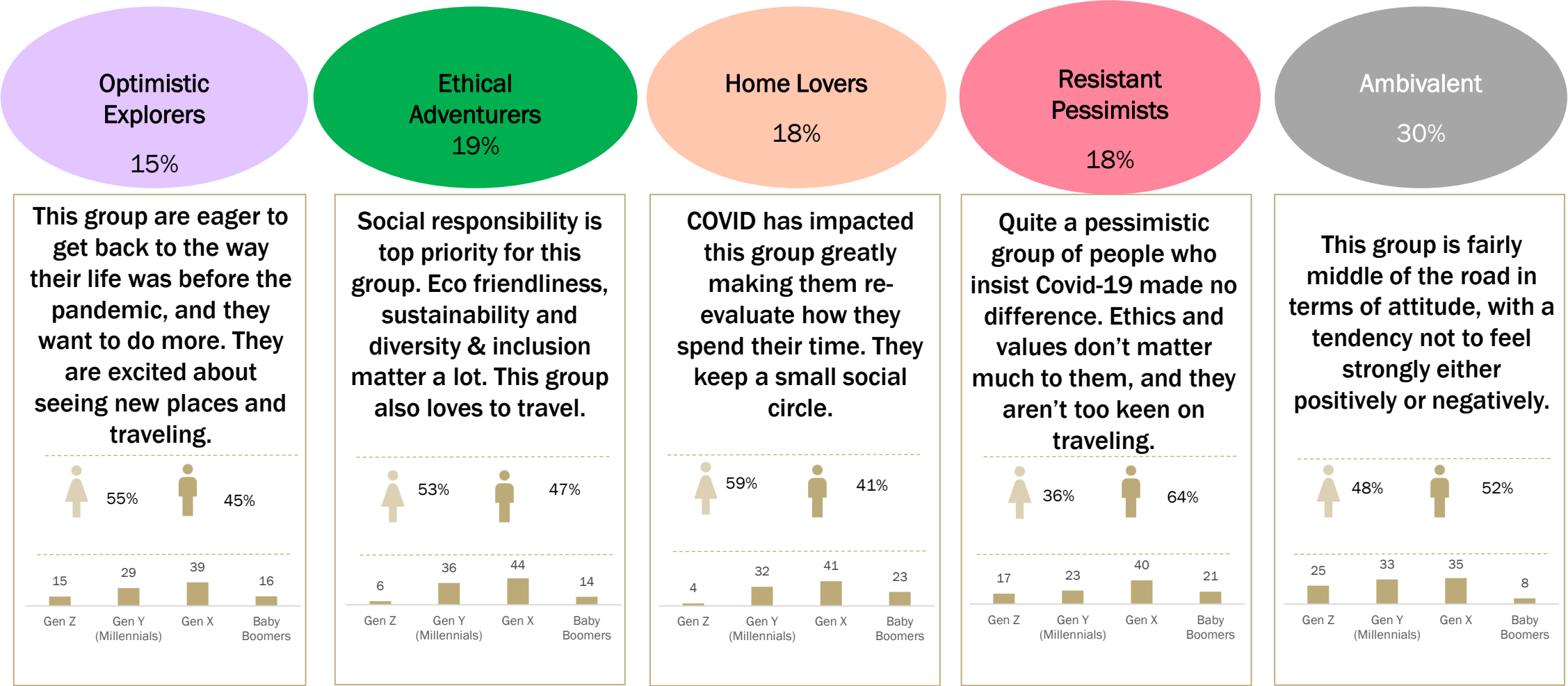
## SEGMENTATION

In order to properly represent the American consumer landscape of today we conducted an attitudinal segmentation across a vast spectrum of topics designed to enable accurate and more personalized targeting

- Impact on Attitude to life
- Economic Situation
- Decision making types
- Online Entertainment
- Ethics/Social Responsibility
- Brand Values
- Relationships

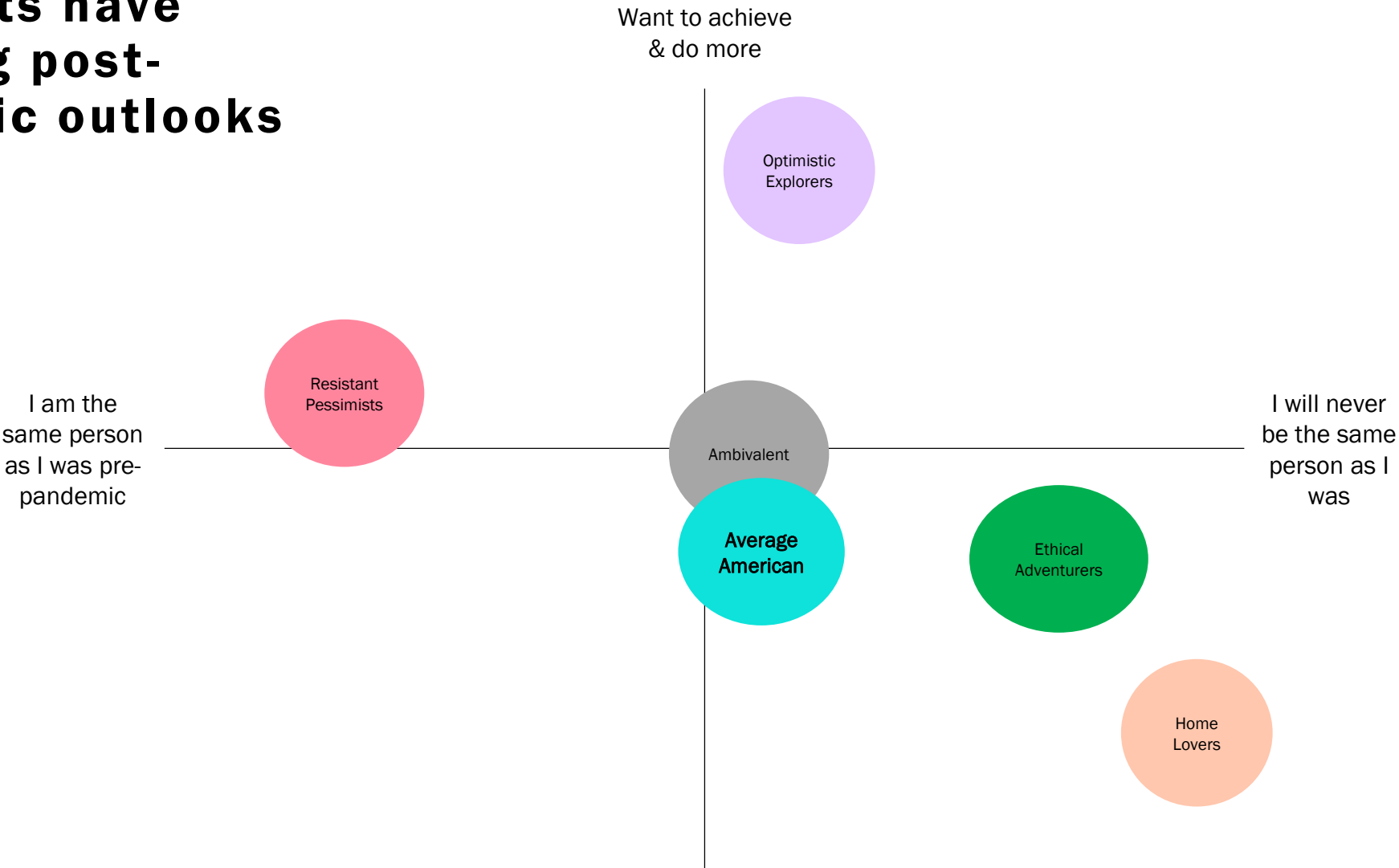


# Five segments created with very different desires, needs & attitudes



A POLARIZING EXPERIENCE: SEGMENTATION

Segments have differing post-pandemic outlooks



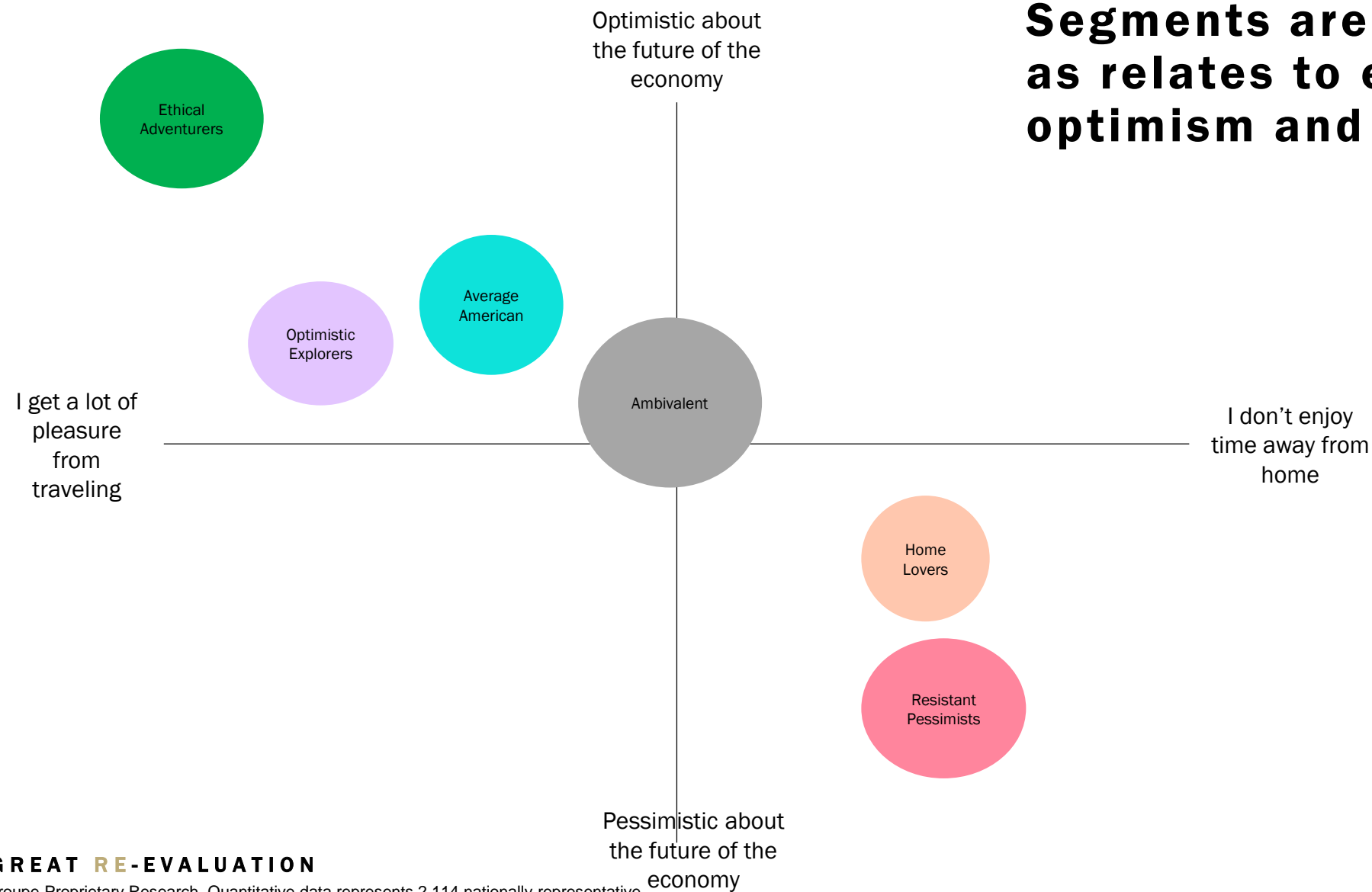
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Want to  
simplify life

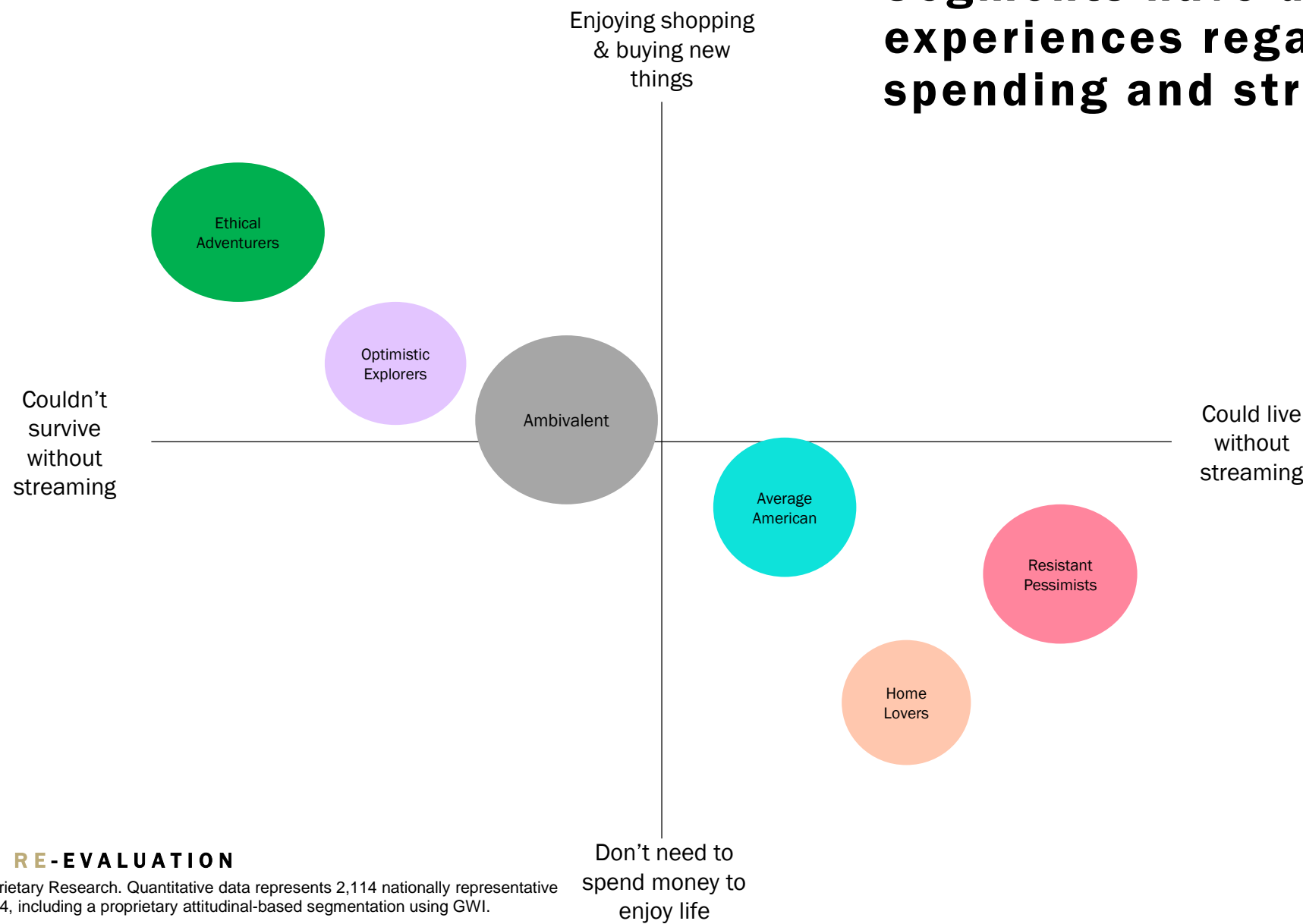
A POLARIZING EXPERIENCE: SEGMENTATION

Segments are divided as relates to economic optimism and travel



A POLARIZING EXPERIENCE: SEGMENTATION

Segments have different experiences regarding spending and streaming



## Segmentation Opportunities

1

### SOLUTIONS TAILORED TO OUTLOOK

It was not a one-size fits all experience and diverse groups of Americans are emerging from the crisis with different views on the future.

2

### A RETURN TO OLD LIFE VS. START NEW

A polarization occurred among people who are eager to go back to how things were and those who feel they will never be the same again.

3

### ALTERNATIVE REALITIES ON ETHICS AND OPTIMISM

Across the segments, different views were held as relates to social responsibility and levels of optimism, thereby impacting what consumers want from brands.

There is an opportunity to adjust our strategy & messaging based on the unique audience situation. The segmentation analysis will become more and more meaningful as we can examine the individual potential of segments and create specific strategies, based on their market position and potential.

# The Great Re-evaluation – In Summary

	SUMMARY	THOUGHT-STARTER
THE GREAT RE-EVALUATION	Americans experienced a once in a lifetime reset.	<i>What is your brand doing to anticipate the new lenses through which Americans make decisions?</i>
THE NEW MEANING	People forged a new relationship with themselves making way for elevated expectations of health and wellbeing.	<i>How can your brand assist as people look to maintain and extend their newfound simple life?</i>
TIME RE-IMAGINED	Time spent was re-imagined and people have emerged wanting more agency over their schedule, downtime, and productivity.	<i>What actions can your brand take to help people protect their new found balance and get more from their time?</i>
SPENDING WITH INTENT	With habitual and impulse spending on pause, a new understanding of value emerged.	<i>How can your brand increase value perception across a widening range of fronts in order to attract spend?</i>
A POLARIZING EXPERIENCE	Re-evaluation does not equal change. The pandemic was a collective experience that impacted people differently leading to a level of polarization.	<i>How is your brand leveraging accurate and sophisticated targeting to hit the right tone amongst key segments?</i>



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# Unpause the Future

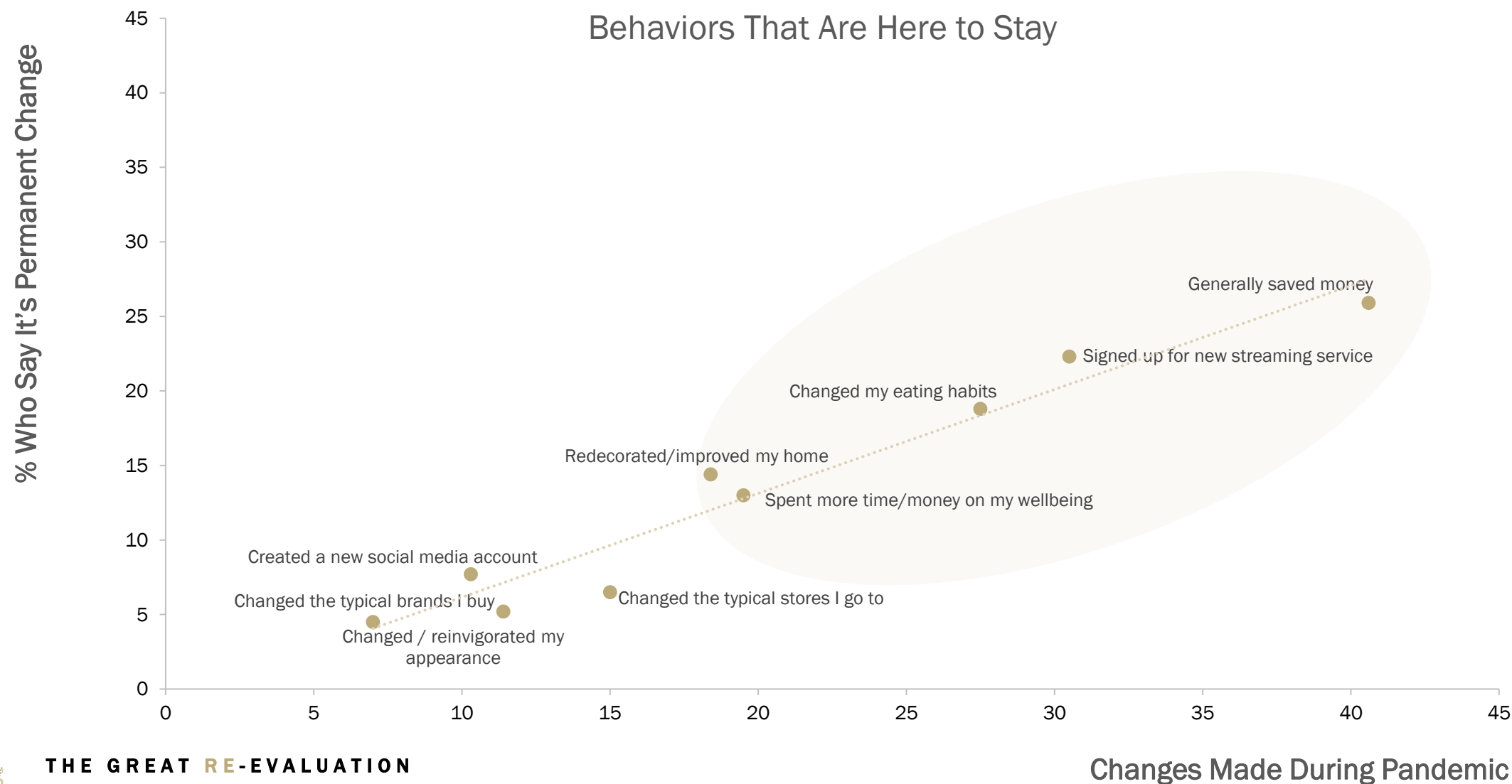


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AS WE MOVE PAST THE PEAK OF THE PANDEMIC INTO THE FUTURE, AMERICANS EXPECT TO RETAIN NEW HABITS THAT REFLECT A SIMPLER LIFE FOCUSED ON HOME, ENTERTAINMENT, WEALTH AND WELLNESS



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Changes Made During Pandemic

**Underneath the trauma of the pandemic, and while the world at large was at war with Covid-19, many were hunkered down in their homes having very individual experiences of introspection, considering if the life they were living before, is the life they want to be living.**

**While not all would admit to it, many Americans came out on the other side with many aspects changing for the better, and as a more wholesome people with a renewed appreciation and focus.**

*“Covid-19 has certainly made me appreciate the value and joy of living each day to the fullest, and the importance of doing that”*

# **Covid-19 will continue to impact the consumer landscape for a long time to come**



- **However, fundamental shifts in people's attitudes and mindsets are here to stay**
- **Brands should not wait any longer to see where the dust will settle and need to act now to stay relevant as the consumer of the future is already here.**

# The Great Re-evaluation: Next Steps for Brands

Explore how consumer decision making has evolved in your category as it relates to time and money spent and how this impacts your brand

Identify white space brand and media opportunities based on new and evolved consumer values, mindsets, and habits

Partner with Publicis to devise future-focused impactful strategies for your vertical by leveraging segments, as well as the unique opportunity to target and activate



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**THANK YOU**



# For more information on this study, please contact

- Jane Strumba, SVP
- Brent Poer, President



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