



# Welcome to the Changers Coronavirus edition



What people think,  
feel and do



# 2020

## Not quite the vision we had in mind

The Changemakers report – a collaboration between **Opinium** and the **Akin** – aims to define macro trends to be expected in the next 18 months.

Consumers tend to be poor at describing their own behaviours, and even worse at predicting the future. That's why we look for signals from the **Changemakers**.

A Changemaker has many names: early adopter, progressive consumer, influencer, 'hipster'. They are **the consumer group that drives change**.





**600**

quantitative interviews

**24**

qualitative interviews

**3**

Markets covered



18-60 years-old?

YES

Voted in a national election or  
referendum in the last 5 years?

YES

Early adopter of new technology?

YES

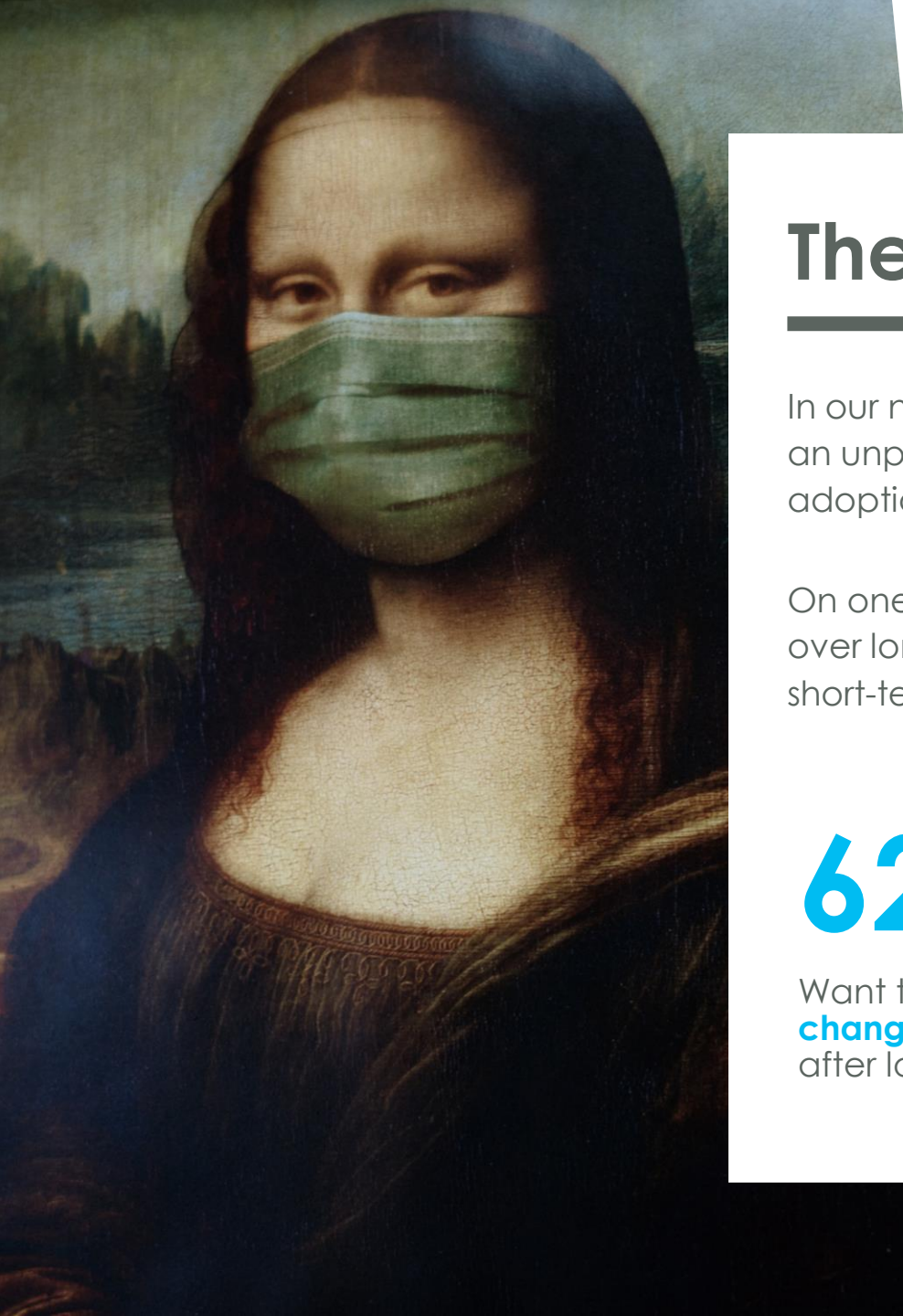
Participate in culture?

YES

Travelled internationally  
in the last 5 years?

YES





# The impact of Coronavirus

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In our new localised, online, low-touch world, we have had a new world form at an unprecedented rate, shaped by top-down new regulations, and bottom-up adoption of new mindsets and habits.

On one side, we are seeing trend adoption (gradual shifts) that were happening over long soft curves, accelerated, and on the other hand, the desperation of short-term moves that come from survival mode.

62%

Want to **radically change** their life after lockdown ends

60%

Want a **better work/life balance** after lockdown ends

79%

Want to lead a **simpler life** after lockdown ends



# Long-term hypothesis

## Political

A reassessment of **globalisation** and nationalism as national governments collaborate whilst supporting local economies

## Economic

The coming **recession** will accelerate industry change and likely exacerbate income inequality

## Sociocultural

Hierarchies of needs will shift from the individual to the collective, although **tensions** between groups disproportionately effected may rise

## Technological

**Digital solutions** have helped us through the pandemic, but concerns about surveillance, censorship and personal data are likely to rise

## Legal

States of emergency have suspended rights that may never be restored, with '**Force Majeure**' the new contractual loop-hole

## Environmental

Global **emissions** have plummeted, potentially providing the proof needed that large scale lifestyle change is possible



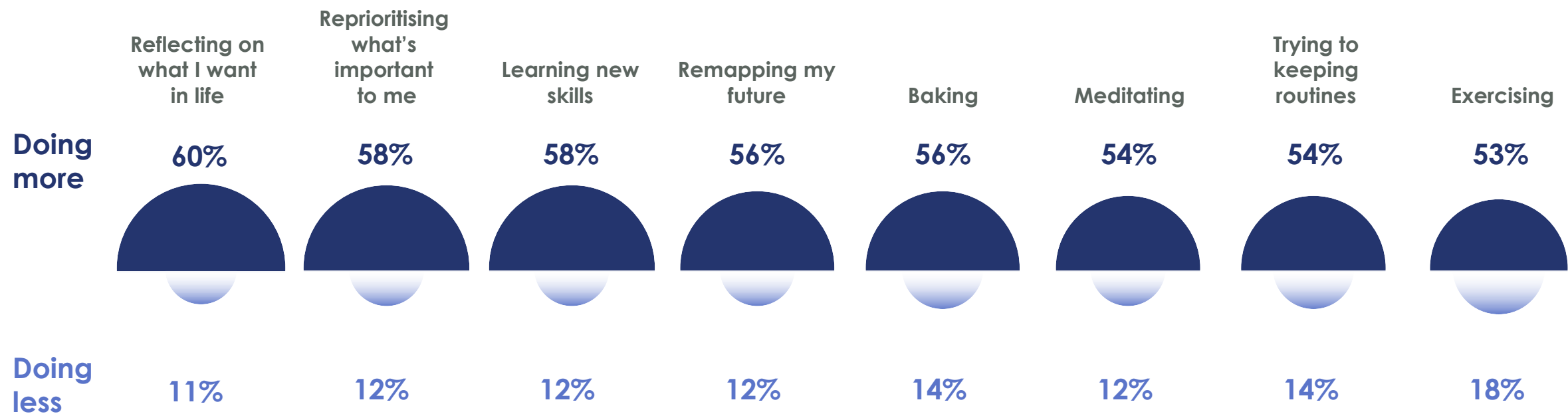
1

# Attitudes & Behaviours

# Lockdown has given Changemakers time to reflect and reprioritise

Have you been doing the following more or less over lockdown?

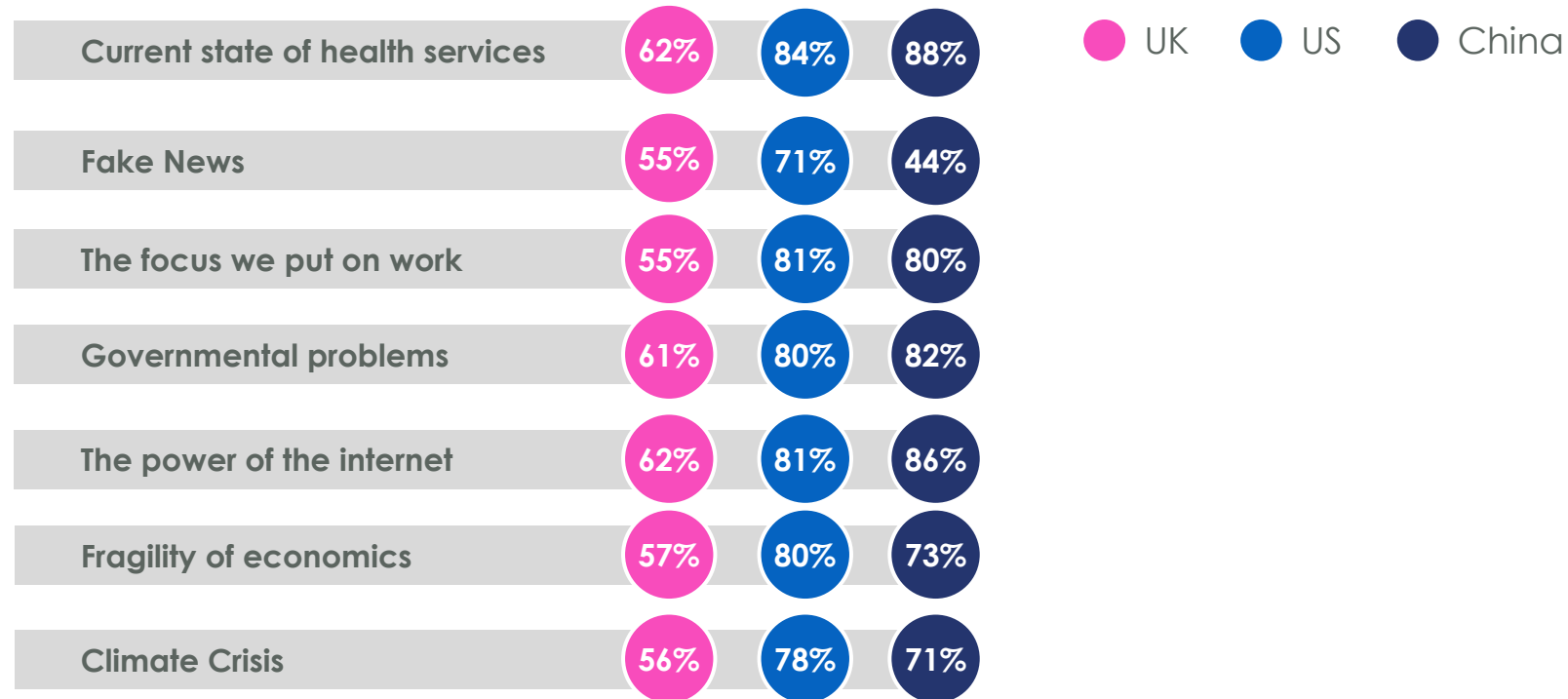
● Total





# Changemakers have become more aware of the current state of health services

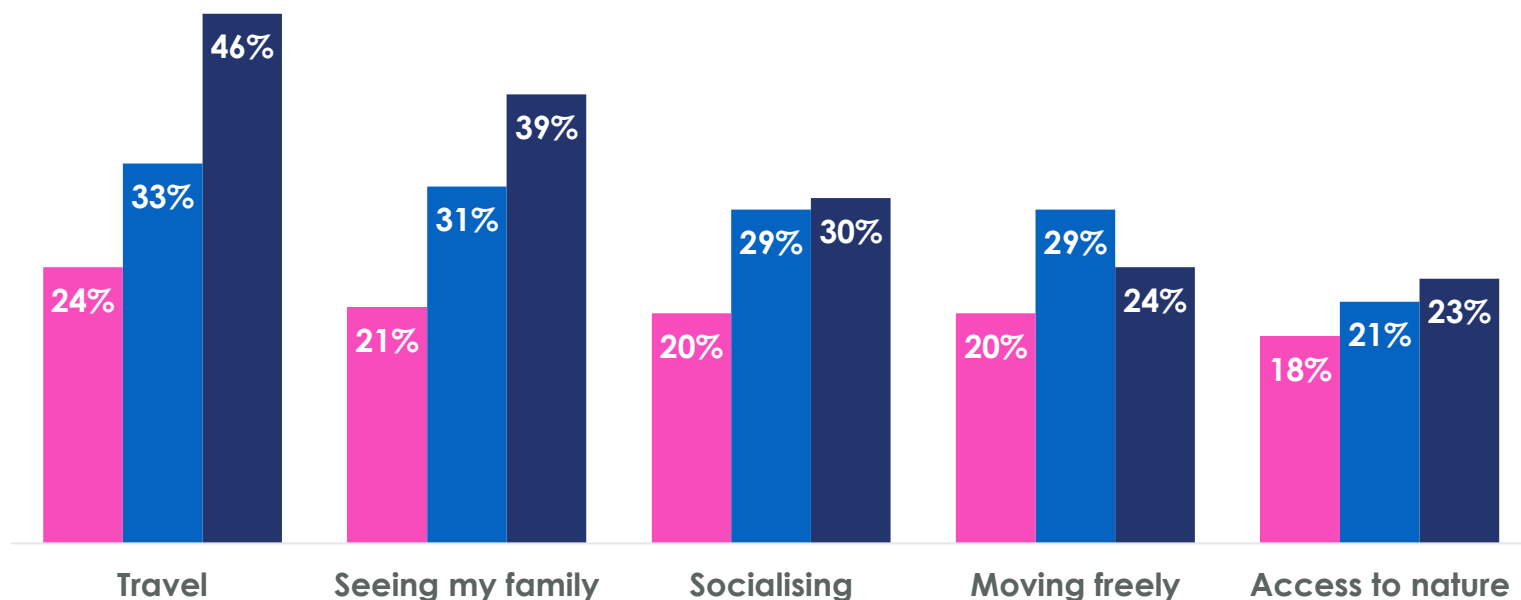
Which of the following have you become more aware of over lockdown?



# Travel is the missed the most from Changemakers in all three countries

Which of the following have you missed most over lockdown?

● UK ● US ● China

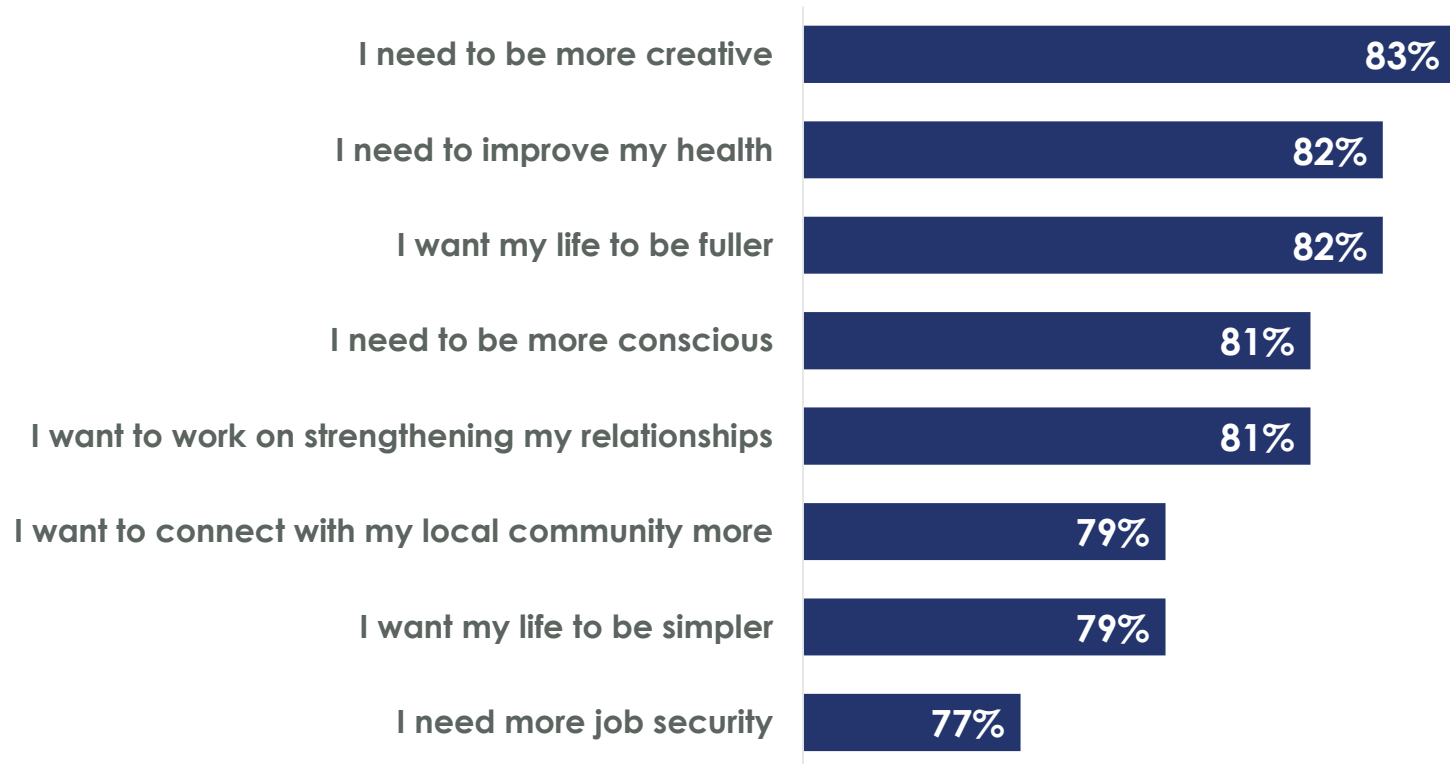




# Changemakers are looking to be more creative and conscious

Which of the following describes how you feel about life post-lockdown?

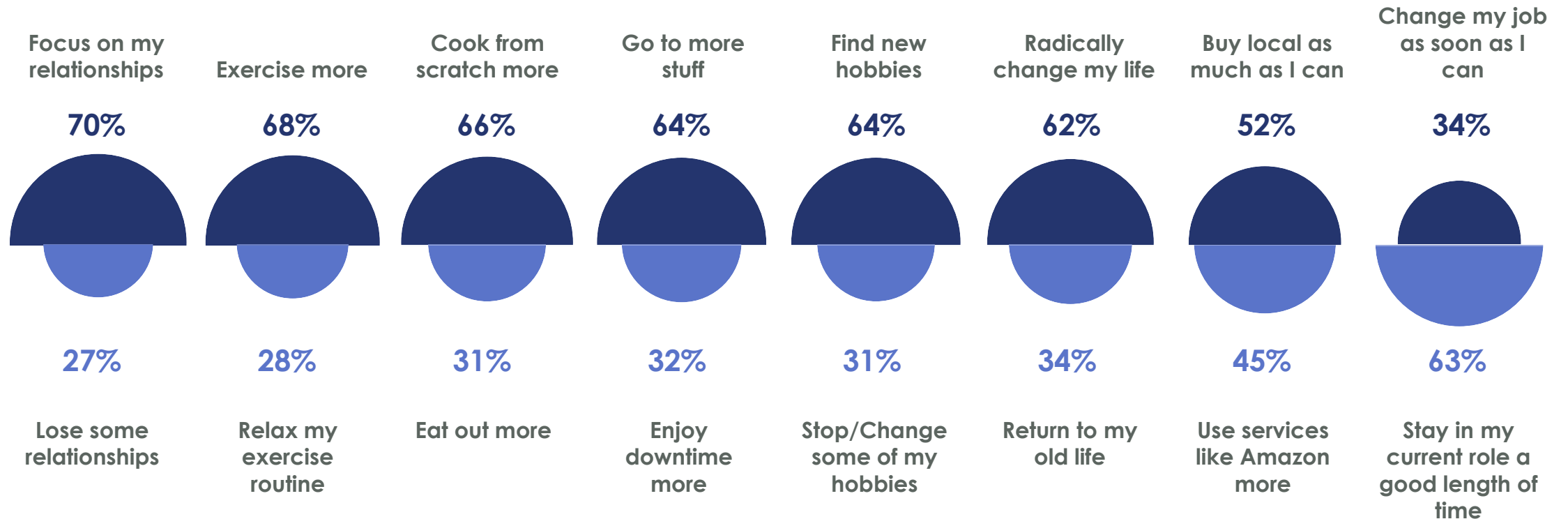
● Total



# After lockdown what are Changemakers most likely to be feeling or doing?

Which of the following describes how will act post-lockdown?

● Total





A woman with dark hair, wearing a blue surgical face mask and a denim jacket, is walking on a city sidewalk. She is looking down at a smartphone in her hands. She is wearing dark trousers and white sneakers. A small, patterned crossbody bag is visible. In the background, another person with a backpack is walking away, and there are trees and a city street with a '40' speed limit sign.

2

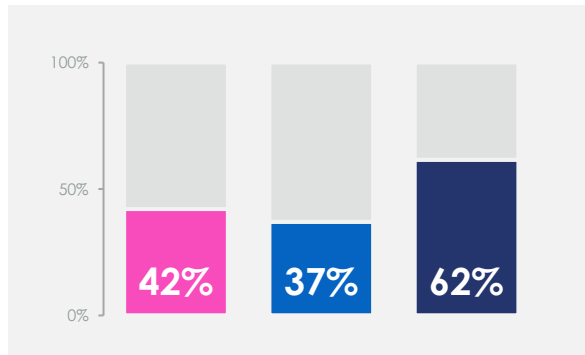
# Influences

# Influences – now

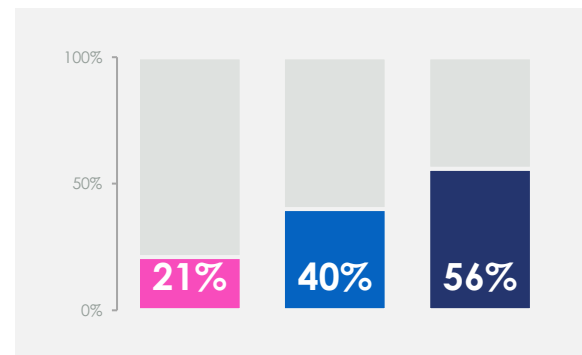
Which of the following has the biggest impact on your opinions **currently?**

● UK ● US ● China

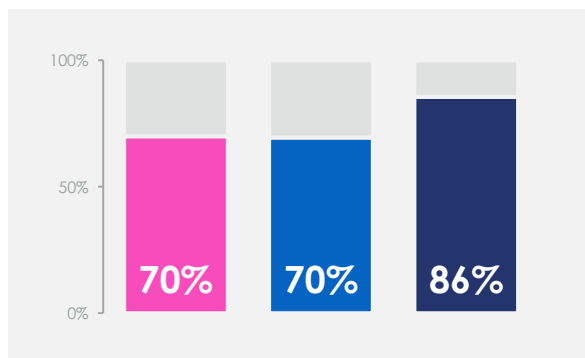
## Scientists/experts



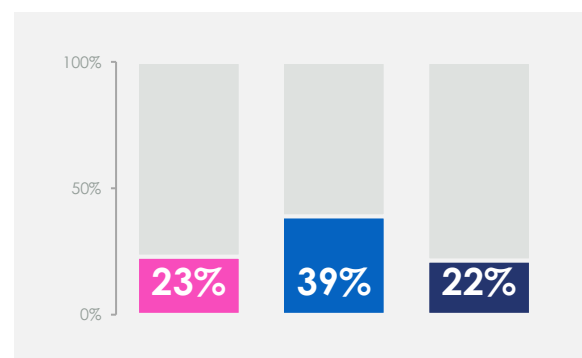
## The Government



## The media



## Celebrities/influencers



We're living in a heightened media environment, with Changemakers trusting it the most to shape their views and opinions – more so than scientists/experts

UK and US CMs trust the Government to shape their opinions as much as they trust celebrities and influencers – i.e. not very much

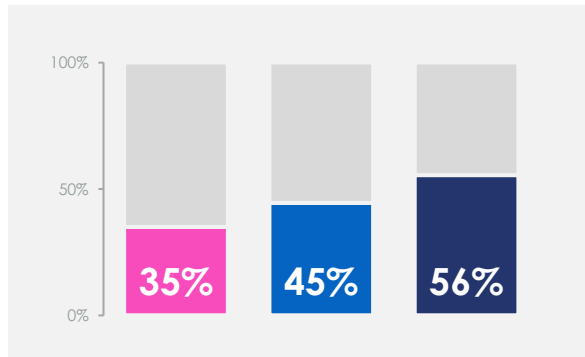




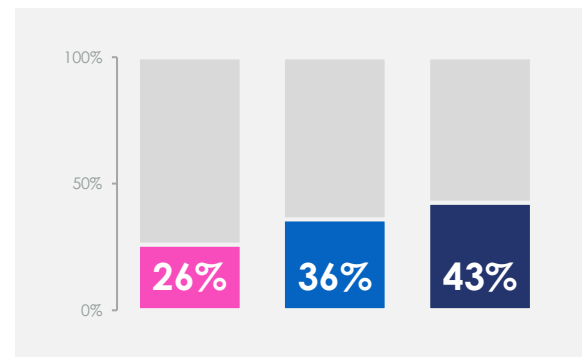
# Influences – post lockdown

And which of the following will have the biggest impact on your opinions **after lockdown ends**?

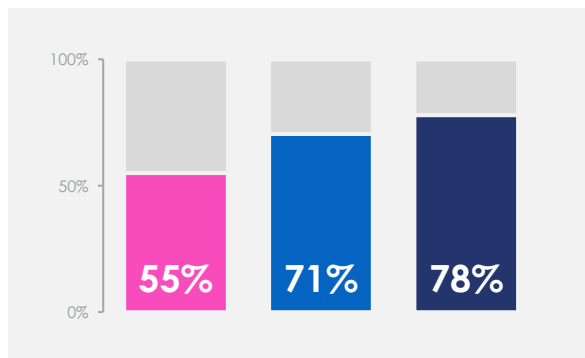
Scientists/experts



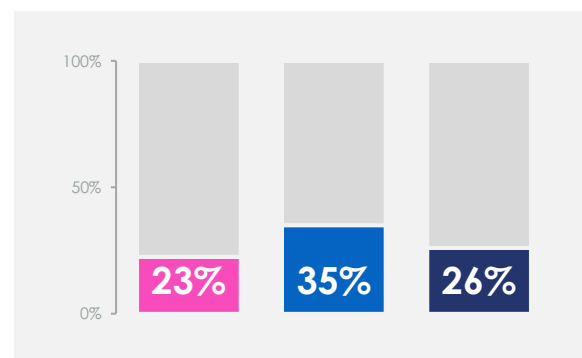
The Government



The media



Celebrities/influencers



● UK ● US ● China

And as lockdown eases, influences won't – with only UK Changemakers saying they'll be less influenced by the media, and Chinese Changemakers less influenced by the Government.







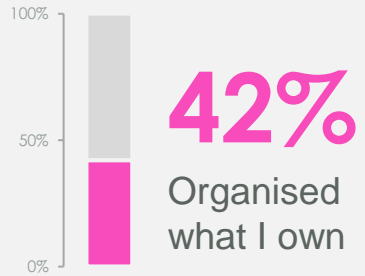
3

# Purchasing



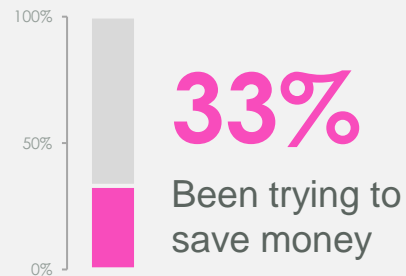
# The rise of utilitarian and hedonistic shopping

## Boredom



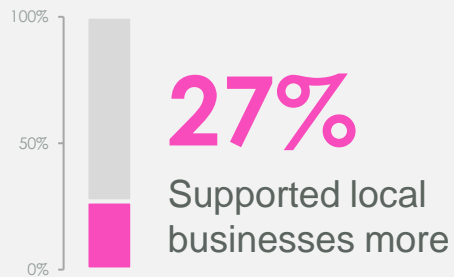
Organised  
what I own

## Financial concern



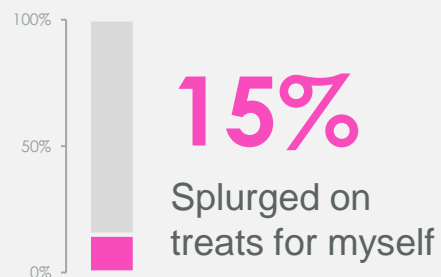
Been trying to  
save money

## Support brands



Supported local  
businesses more

## Treat 'yo self



Splurged on  
treats for myself



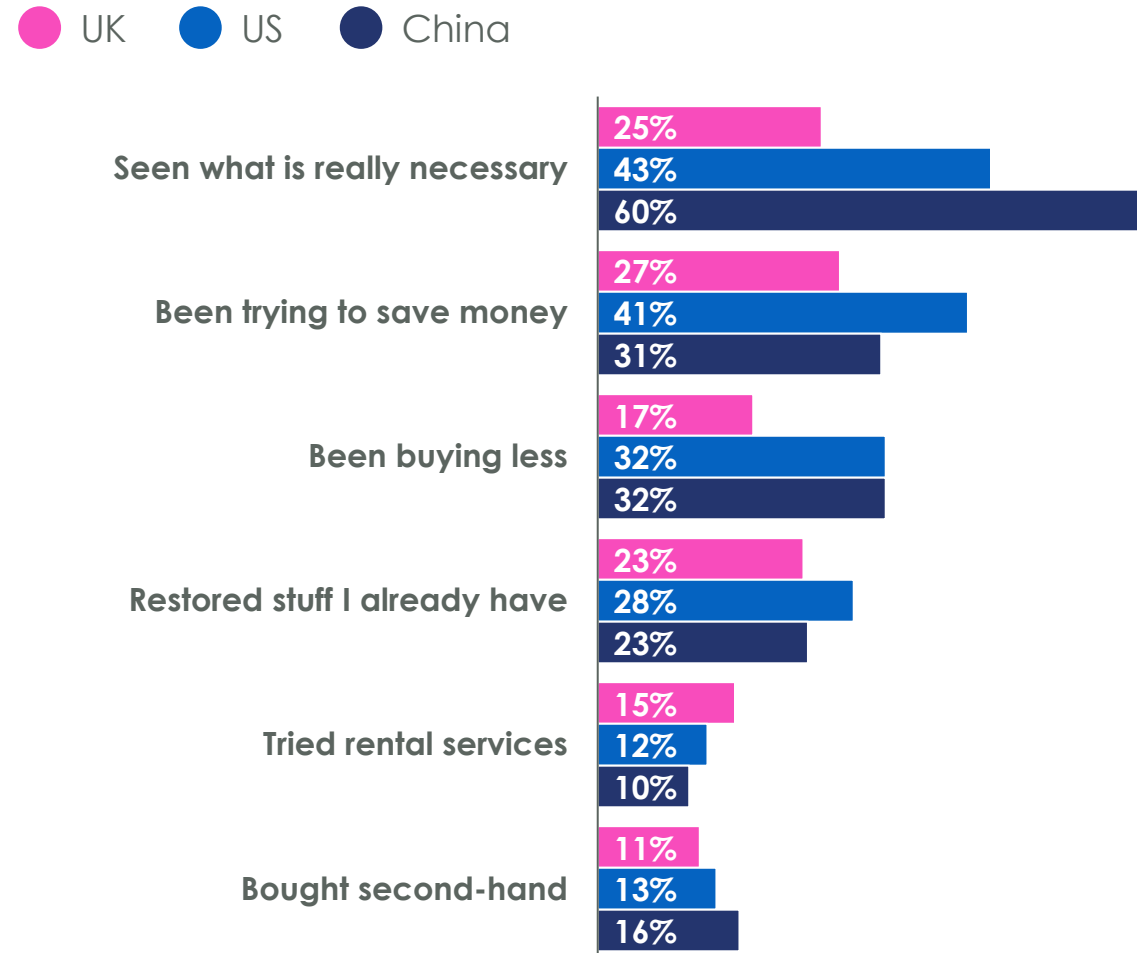
# Utilitarian purchasing

Purchasing as:

**Problem solving**

Motives for shopping include:

- Meeting basic needs
- Finding greater convenience or variety
- Seeking greater quality and better prices





# Hedonistic purchasing

Purchasing as:

**Pleasure**

**Motives for shopping include:**

- Desire for fun and entertainment
- Because we 'need to'
- High levels of involvement drives greater satisfaction

● UK ● US ● China

Planned what I will buy when it ends

24%

39%

56%

Subscribed to more services

31%

41%

31%

Bought gift cards to spend later

17%

26%

9%

Splurged on treats for myself

16%

22%

8%



4

Brands



# The role of brands in a crisis

85%

Want to hear from brands at this time

91%

Think that brands can be helpful at this time

79%

Brands should talk less about what they are doing and just do it

70%

Brands' donations/ equipment supplies still aren't enough



# The role of brands in a crisis

## Short-term:

How to respond to a crisis that significantly impacts consumer behaviour and expectations?

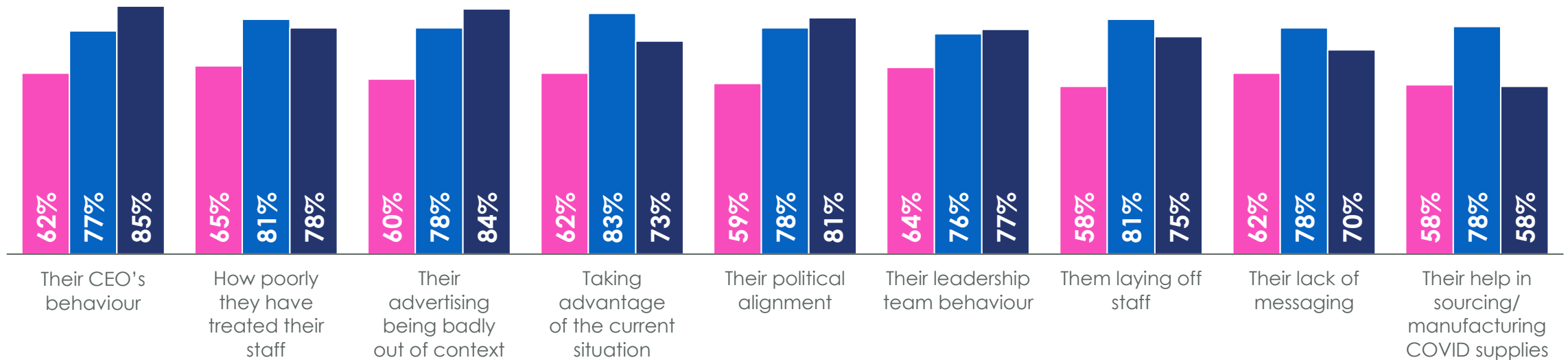




# Firstly, ensure that businesses practices and advertising is reflective of the sensitive national mood

How likely are you to switch FROM a brand because of the following during the crisis?

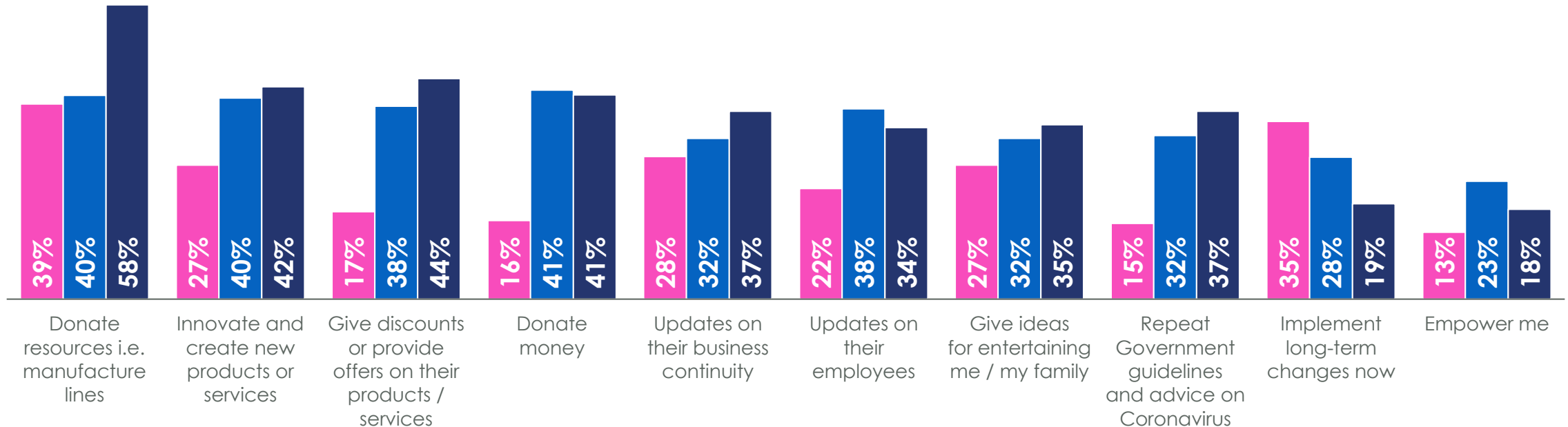
● UK ● US ● China



# Secondly, think about how your brand can help in the fight and look for opportunities to innovate

How do you think brands can be helpful at this time?

● UK ● US ● China

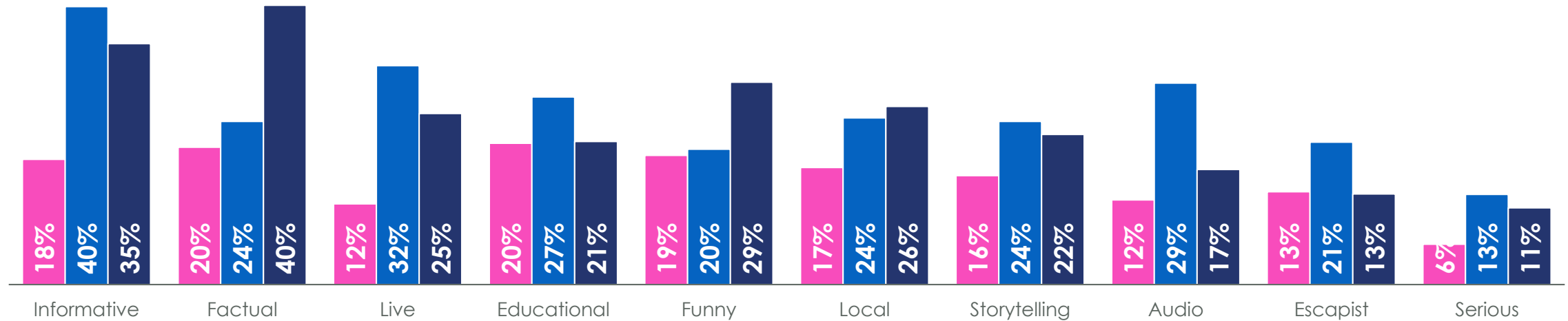




# Thirdly, balance the thirst for information with more humorous content as lockdown lifts

What kind of content would you like to see from brands?

● UK ● US ● China



# The role of brands in a crisis

## Long-term:

How to create and sustain relevance as consumers re-evaluate the role brands play in their lives?

**01** / Don't stop talking

**02** / Innovation and research

**03** / Comfort branding vs. pure creativity





# Case studies: Hygiene brand actions

## Donation of products

Deliveroo has leveraged its network to secure 50,000 NHS staff meals from its partners (Pizza Hut, Itsu, Neat Burger etc.), and created a means by which customers can donate money or buy a meal for NHS staff.

## Supplier of PPE

Armani Group has responded to the pandemic by making a wholesale pivot to the production of single-use medical overalls for healthcare workers on the frontline.

## Corporate Stance

VISA's CEO spoke to the importance of corporate humanitarianism when he pledged via LinkedIn that "(VISA) will have no COVID-19 related layoffs in 2020. There is enough sadness in the world and already too many families impacted,"

## Transparency of New Practices

Meituan wholeheartedly embraced people-centric innovation in response to the pandemic: rolling out a contactless service across 184 Chinese cities, waiving its merchant fee, and making their bike rental service freely available to Hubei residents and medical staff across the country.

## Financial Philanthropy

Bytedance - owners of popular social media platforms, TikTok and Douyin - acknowledged the economic reality of the pandemic in offering RMB 100,000 to any healthcare worker infected on the job.

## Digital Access

Alibaba granted free access to the Taobao Live platform for farmers and to its Foodie Livestream channel, connecting farmers to the platform's millions of followers and ensuring fresh domestic produce can make its way from field to table with ease.

# Case studies: Elevated brand actions



## Democratising Accesses

Minecraft has become the vehicle for Reporters Without Borders' Uncensored Library: a virtual hub of otherwise inaccessible journalism from around the world, including specific sections devoted to Russia, Egypt, Mexico, Saudi Arabia, and Vietnam. By teaming up with Minecraft, a platform which is accessible to pretty much anyone, it allows Reporters Without Borders to further spread its message and connect with more people across the world.

## Catalysing Crowdsourcing

Create Cures taps the collective creative wisdom of design thinking to inspire people-centred public health solutions. Created and led by Chinese designer Frank Chou, the public welfare initiative draws inspiration from the starker Chinese memory of recent pandemics to inform collectively-created services and behaviours.

## Fast-Tracking Sustainability

US National Parks Service collaborated with Google Earth and Google Arts & Culture to meet an amplified appetite for unadulterated escapism, developing virtual tours of 32 US national parks. Rendering profound natural-world experiences digitally available not only democratised access but - incidentally - signalled a sustainable future for interacting with wildlife.

## Providing escapism

Tmall recently responded to the boom in cake-baking by launching a multi-campaign "Bake a Cake 778" (778 sounding like "eat up" in Mandarin). Fuelled by a hashtag viewed more than 240 million times as of late March, the campaign's heart was a mobile game allowing users to "make a cake". Harnessing the visual tropes and memes popular amongst younger audiences, this game lowered the barrier to artistic creation, encouraging users to lose themselves in experimentation and in sharing their unique works.



# Case studies: Elevated brand actions



## Generating Localism

Ant Financial, Alibaba's fintech brand, has used its mobile payment platform to create dedicated space on its landing page to help local businesses in Wuhan to promote their speciality products. Meanwhile KOL Li Jia Qui, the "Lipstick Prince", has hosted live charity streams dedicated to Hubei products. Both initiatives serve to forge an emotional bond between their brand and a specific consumer-base.

## Gaming retail

On April 23rd, Travis Scott put on a virtual concert in Fortnite. During the show, he debuted new music for nearly 28 million players across the world. The concert was the most significant event in Fortnite's history and shortly after "party royale" a violence-free party mode for Fortnite was launched. The first live event took place on May 1st, and was headlined by Diplo featuring a set by Major Lazer.

## Tackling Loneliness

Love Is Quarantine brands itself as a dating service, connecting singletons in pursuit of love, and encouraging them to chat over the phone to align with social distancing orders. Across its Instagram, contestants share confessional videos that document their personal experiences. In aiming to emphasise the importance of emotional over physical connections, the platform has signalled what a more emotionally sustainable and enriching new normal might look like in a post-COVID-19 society.

## Helping deceleration

Aware of the emotional turmoil COVID-19 has generated for children and the pressure their parents are under, Headspace partnered with the iconic US kids show Sesame Street on a series of animated shorts called Monster Meditations. Making the Muppets the recipients of mindful direction to manage their feelings of frustration and disappointment has proven to be a smart strategy for giving children the tools to cope, and has spotlighted the benevolent spirit of Headspace and Sesame Street.

# Case studies: Elevated brand actions



## Fast-Tracking Technology

In March, Calvin Klein shifted its campaign focus away from sales and towards entertainment instead. Together with Tmall's loyalty club, the brand opened a five-day "cloud" pop-up store hosted by Chinese rapper Xiao Gui. Visitors were able to journey through a maze, browse selected product lines, and enjoy fun promotions.

## Creating Community

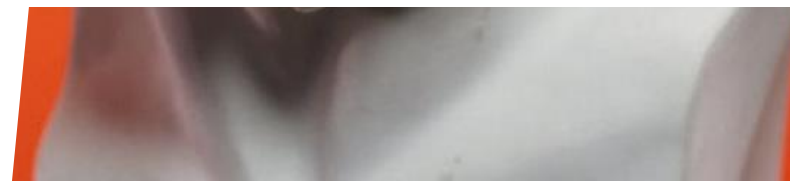
Depop, the community-built reseller site and app, responded rapidly to emerging concerns held within its user-base. Executives set up a WhatsApp group with a selection of sellers first to understand their issues better, and then work collaboratively to find solutions. Establishing a more intimate partnership reflected considerate care, and ultimately translated to an adapted and COVID-19-resilient business practice - the platform saw an uptake in listings, activity and sales since.

## Brand Building & Storytelling

Meituan, the food delivery service, has recently championed the steely reserve and dedication of their riders. TIME magazine's March issue featured Beijing rider Gao Zhixiao, depicted as a symbol of courage, while the marketing material has tapped the creative flair of their riders - using their pictures to humanise the effort. By speaking directly to the human dimension of the crisis, Meituan's efforts have helped forge a deeper emotional bond with its consumers.

## Creativity

Budweiser has revisited and refreshed their culturally iconic celebration of simple kinship: the "wassup" advert that - by way of its catchy and straightforward tagline - was absorbed into the broader cultural discourse. Mining their archives to re-spin a nostalgic moment was a smart and efficient means of celebrating simple rituals of coming together - virtually or otherwise - over a beer.







4


# Springboards

# Areas to keep an eye on


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De-globalisation



Digital citizens



Identity markers



Luxury paradigms



Expertise influence



Heightened hygiene



Virtue signalling



Creative optimism



Neutralising normal



# Opportunity spaces

## De-globalisation



Due to our immediate localisation, we have all been 'home', exploring our neighbourhoods. **Could we see a new type of nationalism rise, one who loses the violent patriotism and celebrates community?**

Travel bans have scuppered holiday plans, and have forced us to consider how we can holiday within our borders. **Could we see a new staycation wanderlust emerge?**

Border closures have also created complications in supply chains and forced a conversation about near-shoring. Many countries have realised their fragility and vulnerability due to the lack of localised manufacture and production. **Could we see brands taking back ownership of manufacture within their native lands?**



# Opportunity spaces

## Digital citizens



Forget digital twins, we now live online in our temporal realities. Businesses in all sectors have had to digitise rapidly, raising inevitable questions about what is needed to be done IRL anymore.

**Could we** see a new type of pushback, where instead of being offended by someone's use of a phone in a social moment, we **question why we aren't having this social moment on the phone in the comfort of our own hygienic space?**

As the rest of the world sees the impact that track-and-trace has had in the East, data is becoming the hero of the 'Rona story.

However, in countries where democracy is controlled or under threat, new surveillance laws are being fast-tracked under the guise of civic protection. **Could we see a data battle on the horizon where citizens will have to fight for the rights to be their own data stewards?**



# Opportunity spaces

## Identity markers



Modern culture enforced us to optimise and self-ameliorate holistically. Changemakers have struggled in lockdown with the guilt of 'doing nothing' and conversely the pressure to use this time positively. **Could we see a shift where we need support in prioritisation of what to ameliorate?**

Modern identities are in large defined by our work, what we do is who we are - just look at most of our Instagram bios. As Changemakers further reject capitalistic thinking, they don't want to be defined by their output. **Could we see a new world where we identify ourselves on our ability to balance?**





# Opportunity spaces

## Luxury paradigms



'Rona has slowed down our consumption, the recession we look to face is opening up debates around our essentials and our prized but unnecessary possessions.

When tightening belts, 'luxuries' are the first to go, but then new luxuries are created - treats or rarities. **Could we see a new luxury space which explores our necessities or the meaning of treats?**

One of the things we miss the most and which will remain a rarity for the foreseeable future is human connection. The luxury industry centres around service, with humans and their expanded efforts at the core of that.

**Could we see a new version of luxury service without humans?  
Or might we see a resurgence of craft which celebrates humanism?**



# Opportunity spaces

## Expertise influence



With crumbling trust in some political leaders and concerns over fake news and mis-information on the virus, Changemakers are looking for actionable advice from sources which have evidence and expertise.

**Could we see a return of the expert and a rise in respect for academics?**

As we have over-consumed social media during this period, and celebrities have over-shared their highly comfortable lives, escaping from urban areas or private virus testing while trying to democratise struggle in this time has created a backlash with Changemakers.

**Can we finally see the end of the celebrity influencer?**



# Opportunity spaces

## Heightened hygiene



The current disruption around how we socialise, eat, shop, travel or work is not set to normalise anytime soon. New demands and new regulations will create tighter hygiene expectations from spaces and interactions.

**Could we see a world with zero UX interfaces? Could we see an automation surge, which meets our new hygiene requirements more effectively?**

As Changemakers prioritise health and wellbeing, prevention becomes their new mindset. **Could we see preparedness becoming a critical value which they will respect and for which they will advocate?**





# Opportunity spaces

## Virtue signalling



Over the last 3 months, we have seen businesses pivot and offer much-needed support to their systems. Changemakers admire this action, and now the PR plugs have died down they expect those in power to do good - it is a new hygiene factor. **Could we see boredom with brands who over-signal their support?**

In a call-out culture, Changemakers are the first to spot insincerity and purpose-washing. As more businesses use the virus as a PR opportunity to signal their 'values', the risk of bandwagoning is high.

**Could we see Changemakers more actively boycott brands that they feel have taken advantage of this moment?**



# Opportunity spaces

## Creative optimism



New thinking is needed.

Flexibility is a modern-day skill we all need, but we have seen the commercial and societal need to adapt rapidly: and whether that is repurposing or full-scale evolution, it is time to get smart.

**Can we see a new time for the creative industries to get the budgets they deserve to spot and shape these new opportunities?**

**Can we finally see a real renaissance of innovation?**



# Opportunity spaces

## Neutralising normal



When the world is upended, we lean into nostalgia. For Changemakers it regrounds them, creating a calmness that they need to deal with our new reality. It also helps them to see how we are closer to normal than we are to a complete revolution. **Can we see effectiveness in neutralising anxiety through 'normal' programming/ comms?**

The media is obsessed with reporting on our new normals: Changemakers are becoming apathetic to the news. They are sanctuary-building to cope, carving out their own simple normal, uninterrupted by the outside. **Can we see a new embracing and celebration of mundanity?**





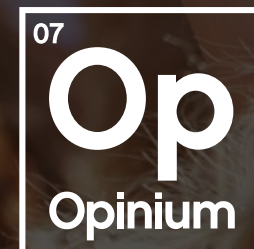


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What people think,  
feel and do