THE POST-NORMAL CONSUMER:
NAVIGATING AN UNCERTAIN PRESENT & FUTURE

KEY FINDINGS

FEBRUARY 2021

data studio

Background & Objectives

» Identify the impact of the coronavirus pandemic on the interests, behaviors, and lives of American women

» Create a consumer segmentation to help advertisers, marketers and content creators better understand and address changing consumer demands across advertising categories

» Model segments onto Meredith's 180 million consumer database to be available for print and digital activations

Multi-Method Study

MAY
1. EDITORIAL BRAINSTORM

JUNE
2. INTERNAL EXECUTIVE INTERVIEWS

JULY
3. ONLINE BULLETIN BOARDS
4. EXTERNAL CLIENT INTERVIEWS

AUGUST
5. PRE-TEST SURVEY OF BELIEFS & PSYCHOLOGICAL CHARACTERISTICS

SEPTEMBER
6. GEN POP SURVEY

OCTOBER
7. SURVEY OF MEREDITH WOMEN

NOVEMBER
8. SOCIAL LISTENING & WEB TRAFFIC ANALYSIS
9. MODELING & DATABASE TAGGING

Why This Research Is Different

SEGMENTATION

- sophisticated, nuanced view of American women based on a seven-group segmentation
- identification of segment-specific content and advertising strategies
- ability to target and activate consumer segments

PSYCHOLOGICAL PERSPECTIVE

- focus on psychological responses to the pandemic
- consumer differences based on long-term characteristics resulting in stable future predictions
- retained psychologist **Dr. Joshua Ackerman** (University of Michigan) as a consultant

How You Can Reach & Understand Your Post-Normal Consumers

Strategic consulting based on segmentation study findings

Customized presentations of insights

Custom studies using Meredith research panels

QUANTITATIVE CAPABILITIES

- » 71,000 members scored and ready to survey
- » Can screen for your brand and competitive users to provide tailored insights

QUALITATIVE CAPABILITIES

- » Online bulletin boards
- » In-depth interviews

Use of Meredith's Post-Normal Study segment typing tool

- » Assign female members of client research panels and customer databases to Post-Normal consumer segments

Cross platform activations to 63 million segmented consumers on Meredith's corporate database

Range of Consumer Responses to the Pandemic

NO CHANGES 31%

SOME CHANGES 45%

MANY SIGNIFICANT CHANGES 24%

the number and type of changes made will be a function of...

PERSONAL CHARACTERISTICS

» demographics
» psychological makeup
» political orientation
» interests and hobbies

IMPACT OF THE PANDEMIC

» physical + mental health
» finances + income loss
» location + region; urban/suburban/rural
» experiences + attitudes about pandemic

Whom We Talked To

GEN Z 15%	MILLENNIALS 36%	GEN X 23%	BOOMERS 26%	PARENTS 42%
MEDIAN HOUSEHOLD INCOME $81K	BACHELOR'S DEGREE + 54%	EMPLOYED 64%	WORKING FROM HOME 49%	ESSENTIAL WORKER IN HOUSEHOLD 52%
LIVE IN AN AREA WITH A LOT OF COVID CASES 47%	PERSONALLY CONTRACTED COVID-19 7%	KNOW SOMEONE WHO HAD THE VIRUS 43%	WORRIED ABOUT CONTRACTING COVID-19 35%	HOUSEHOLD LOST INCOME 34%

What We Need to Know to Better Understand the Future

1 HOW DO WOMEN DIFFER IN THEIR RESPONSE TO THE PANDEMIC?

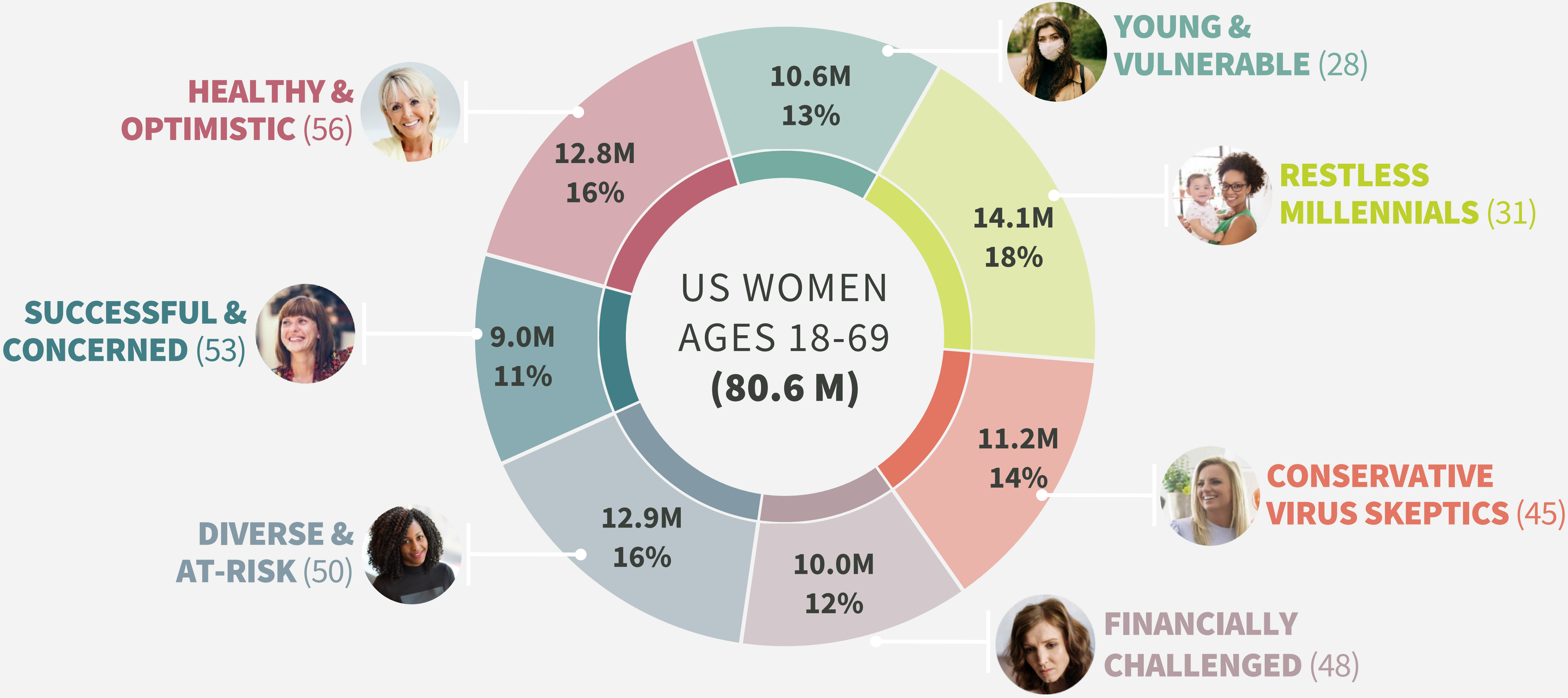
2 WHAT ARE PERCEPTIONS, ATTITUDES & BEHAVIORS ABOUT THE PANDEMIC?

3 HOW HAS PHYSICAL AND MENTAL HEALTH BEEN AFFECTED?

4 WHAT DO CONSUMERS WANT FROM BRANDS & ADVERTISERS?

POST-NORMAL **CONSUMER SEGMENTATION**

Segmentation Overview



YOUNG & VULNERABLE

AGE 28

greatly fears contracting the virus

anxious | liberal
empathetic | introverted
environmentally-conscious
open-minded | sensitive
impulsive | impatient

ABOVE AVERAGE FOR BEING
urban
single
politically active

MEREDITH AFFINITIES
People
Entertainment Weekly
Allrecipes

INTERESTS
social issues
pets
celebs & entertainment
style & fashion

PANDEMIC SPENDING
tried and will keep using new brands

WILLINGNESS TO MAKE LIFESTYLE CHANGES
will make some changes, but not others

WANTS ADVERTISING THAT
shows a mix of uplifting and serious content

HEALTH
mental & physical health have declined during the pandemic

PANDEMIC SPENDING
bought things to feel better; will shop online more

ABOVE AVERAGE FOR BEING
urban
kids in household
career-oriented

INTERESTS
DIY home projects
parenting & family
celebrities
clothing & fashion

WILLINGNESS TO MAKE LIFESTYLE CHANGES
will make some changes, but not others

HEALTH
mental & physical health have declined since pandemic began

RESTLESS MILLENNIAL
AGE 31

wants to get back to active lifestyle

impatient | adventurous
impulsive | leader
dramatic | disorganized
lazy | deep

MEREDITH AFFINITIES
InStyle
People
Parents
Allrecipes

PANDEMIC SPENDING
tried new brands, but prefers old favorites

WANTS ADVERTISING THAT
is uplifting, does not mention the pandemic

PANDEMIC SPENDING
will shop online more

ABOVE AVERAGE FOR BEING
rural
evangelical
white

CONSERVATIVE VIRUS SKEPTIC
AGE 45

not concerned about the virus

conservative | happy
fun-loving | opinionated
religious | healthy
active

MEREDITH AFFINITIES
BH&G
Real Simple
Allrecipes

INTERESTS
cooking
healthy living
gardening

PANDEMIC SPENDING
wants to purchase her usual brands

WILLINGNESS TO MAKE LIFESTYLE CHANGES
will make few or no changes

WANTS ADVERTISING THAT
focuses on products, not the pandemic

HEALTH
mental & physical health has remained stable

PANDEMIC SPENDING
home improvement
clothing

ABOVE AVERAGE FOR BEING
rural
northeast
republican

INTERESTS
cooking
health conditions
home organizing

WILLINGNESS TO MAKE LIFESTYLE CHANGES
will make some changes

HEALTH
mental health has declined since the pandemic began

FINANCIALLY CHALLENGED

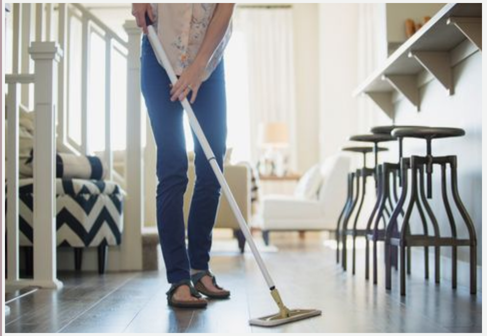
AGE 48

experienced a job loss or income loss

anxious | organized
introverted | impatient
conservative | bossy
obsessive | pessimistic

MEREDITH AFFINITIES
People
BH&G
Real Simple
Allrecipes

PANDEMIC SPENDING
wants to purchase her usual brands



WANTS ADVERTISING THAT
focuses on products, not the pandemic

PANDEMIC SPENDING
food & cooking
home design & décor
home cleaning

ABOVE AVERAGE FOR BEING
urban
non-white
south

INTERESTS
racial justice
personal care
food & cooking
health conditions

WILLINGNESS TO MAKE LIFESTYLE CHANGES
will make many significant changes

HEALTH
mental & physical health have declined during the pandemic

DIVERSE & AT-RISK
AGE 50

psychologically feels very close to the virus; at-risk due to underlying conditions (self or family)

empathetic | generous
calm | balanced
spiritual | religious | liberal

MEREDITH AFFINITIES
People
BH&G
Allrecipes
Southern Living

PANDEMIC SPENDING
wants to purchase her usual brands

WANTS ADVERTISING THAT
focuses on how we can emerge even stronger after the pandemic

PANDEMIC SPENDING
will maintain or increase online shopping

ABOVE AVERAGE FOR BEING
affluent
retired
democrat

INTERESTS
travel
health & wellness
social issues

WILLINGNESS TO MAKE LIFESTYLE CHANGES
will make some changes, not others

HEALTH
physically & mentally healthy

SUCCESSFUL & CONCERNED

AGE 53

feels her personal efforts make a difference in battling the pandemic

intelligent | detail-oriented
open-minded | organized
environmentally-conscious
liberal | balanced

MEREDITH AFFINITIES
People
BH&G
Allrecipes
Travel + Leisure

PANDEMIC SPENDING
wants to purchase her usual brands

WANTS BRANDS TO
implement safety measures & protect employees

PANDEMIC SPENDING
will shop online less once pandemic ends

ABOVE AVERAGE FOR BEING
retired
religious
republican

INTERESTS
travel
health & wellness
food & cooking
personal care

WILLINGNESS TO MAKE LIFESTYLE CHANGES
will make some changes, not others

HEALTH
physically & mentally healthy

HEALTHY & OPTIMISTIC
AGE 56

not worried about the virus, but takes action to prevent the spread

happy | easy-going
optimistic | balanced
generous | calm
conservative

MEREDITH AFFINITIES
People
BH&G
Allrecipes
Travel + Leisure

PANDEMIC SPENDING
wants to purchase her usual brands

WANTS BRANDS TO
focus on product quality & customer needs

PANDEMIC SPENDING
food & cooking
DIY home projects
gardening

Number of Lifestyle Changes Due to Pandemic

NO CHANGES → **MANY SIGNIFICANT CHANGES**







CONSERVATIVE VIRUS SKEPTIC (45)	**HEALTHY & OPTIMISTIC** (56)	**RESTLESS MILLENNIAL** (31)	**SUCCESSFUL & CONCERNED** (53)	**FINANCIALLY CHALLENGED** (48)	**YOUNG & VULNERABLE** (28)	**DIVERSE & AT-RISK** (50)
little impact from the pandemic	not worried about virus	doesn't feel actions make a difference	affluent, educated, healthy	lost income	anxious; struggling mentally	underlying conditions
healthy	little financial strain	not vulnerable to the disease	not impacted, but concerned about virus	susceptible to virus	worried about spreading virus	financial setbacks
more concerned about economy	believes pandemic is part of God's plan	misses busy lifestyle	believes her actions make a difference	struggling mentally	making impulse purchases	feels closest to pandemic

MEREDITH CORPORATE DATABASE

63 MILLION CONSUMERS AVAILABLE FOR CROSS PLATFORM ACTIVATIONS*

QUESTIONS? reach out to postnormalstudy@meredith.com

HEALTHY & OPTIMISTIC
13.0 Million (21%)

YOUNG & VULNERABLE
12.5 Million (20%)

CONSERVATIVE VIRUS SKEPTICS
9.2 Million (15%)

SUCCESSFUL & CONCERNED
8.8 Million (14%)

FINANCIALLY CHALLENGED
7.4 Million (12%)

DIVERSE & AT-RISK
6.3 Million (10%)

RESTLESS MILLENNIALS
6.2 Million (10%)

*Women 18-69 and meet income requirements; available for activations beginning in February 2021


WHAT ARE WOMEN'S **PERCEPTIONS, ATTITUDES & BEHAVIORS** ABOUT THE PANDEMIC?

Half of women feel psychologically close to the pandemic

49%

say the coronavirus pandemic *feels close to them*

DIVERSE & AT-RISK

74% feel close to the pandemic *(index 150)*

79% think more favorably of brands with pandemic-focused ads *(index 174)*

CONSERVATIVE VIRUS SKEPTICS

10% feel close to the pandemic *(index 20)*

7% think more favorably of brands with pandemic-focused ads *(index 14)*

PSYCHOLOGICAL PERSPECTIVE

Construal level theory says that people who feel closer to an event pay attention to different types of information (concrete vs. abstract features) and are persuaded by different messaging.

BRAND IMPLICATIONS

Messaging focused on specific product features and benefits would resonate most with those who are closer to the pandemic.

Those who have not been impacted are more likely to respond to broader messages, including product desirability.

A3. How distant or close does the coronavirus pandemic feel to you? [% very/somewhat close]
A4. Which, if any, of the following did you experience as a result of the coronavirus pandemic?

Women's experiences during this time impact future behavior

those who feel psychologically close to the pandemic are more likely to...

1. make changes to their lifestyle post-pandemic (**31%** vs. **17%** of those who don't feel close to pandemic)
2. continue to buy new brands + products they tried during the pandemic (**63%** vs. **52%**)
3. spend money to make their time at home more enjoyable (**56%** vs. **45%**)
4. feel living an active, healthy lifestyle has become more important now (**52%** vs. **39%**)

V1. Looking ahead to when the coronavirus pandemic has ended, which of the following statements most closely describes how you intend to live your life going forward?
B1. How much do you agree or disagree with each of the following statements? [agree strongly/agree somewhat]
A4. Which, if any, of the following did you experience as a result of the coronavirus pandemic?
Y3. Since the coronavirus pandemic began, has each of the following become more important, less important, or no change in importance to you?

While most women wear face masks, some question their effectiveness and the need to be mandatory

67%

believe wearing a face mask **is effective in preventing** the spread of coronavirus

72%

believe wearing a face mask **should be mandatory** when social distancing is not possible

By now, it has been shown that [masks] make a difference. The mask protects others from you; I want someone to exhibit that same concern for me. Show respect and care for others. This virus is serious.

— **Dawn G., 61**

PSYCHOLOGICAL PERSPECTIVE

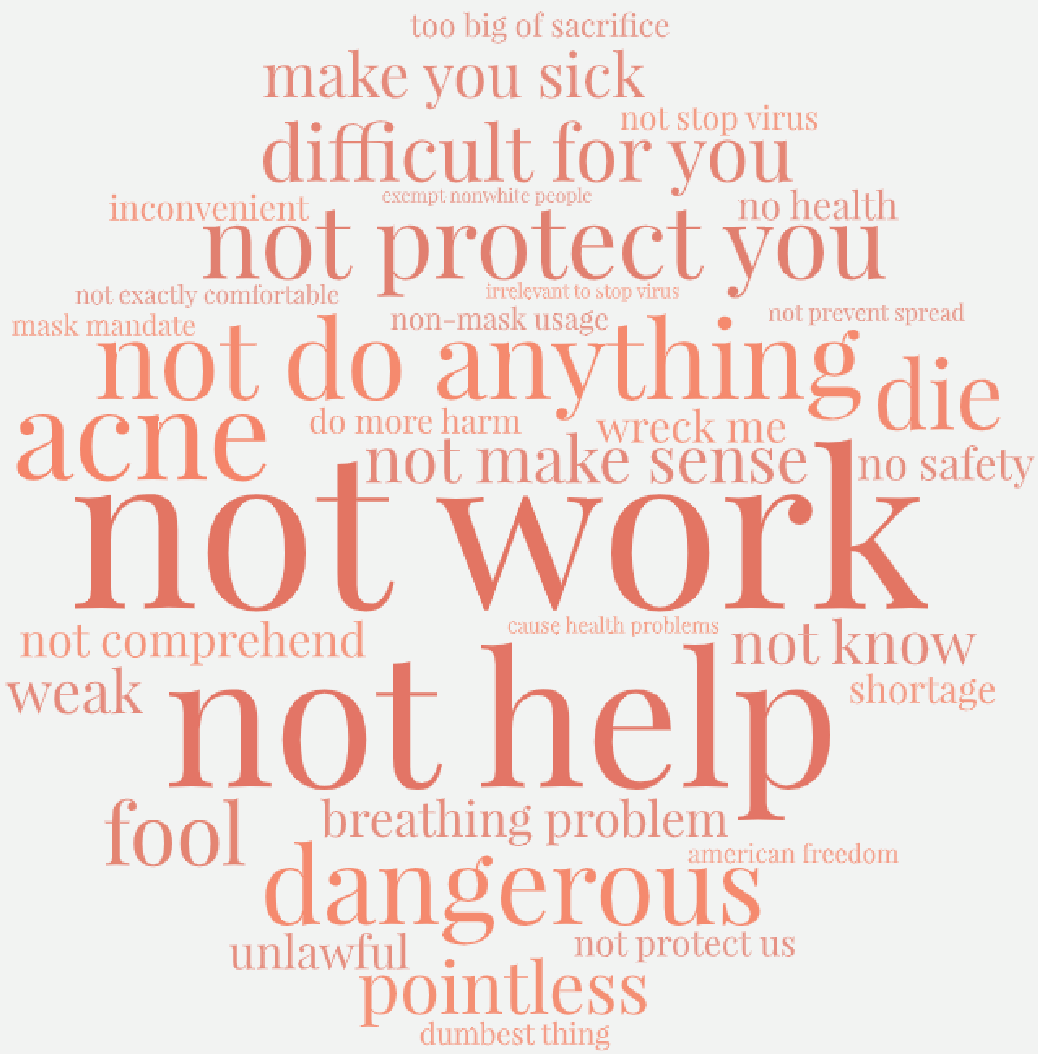
Feelings about masks are determined by what they're being told (effectiveness) or the direct experience of wearing one (comfort).

Beyond that, psychologically, *masks represent a social symbol (belonging to a social group) and reflect a person's motivations.*

The pro-mask group sees masks as a means to help others, whereas anti-maskers see them through a self-focused lens. These differences are exaggerated for those who feel their social group is more central to their identity.

A2. How much do you agree or disagree with the following statement? [% agree strongly/agree]
A4. Which, if any, of the following did you experience as a result of the coronavirus pandemic?

Social listening: what women are saying about masks



The pandemic has encouraged women to save for unexpected circumstances

African American and Hispanic women were particularly impacted financially

SAVINGS & FINANCIAL UNCERTAINTY	
The pandemic made me realize I should save more for unexpected circumstances	52%
Financial uncertainty created by the virus influences most of my purchase decisions	30%
I expect someone in my household will lose income or benefits in the next 6 months	19%

highest among…
GEN Z, MILLENNIALS, AFRICAN AMERICAN WOMEN

54% saved money during the pandemic

21% used up a lot of savings to stay afloat

34% household experienced job loss, reduced hours, or salary cut

FINANCIALLY CHALLENGED

MOST IMPACTED FINANCIALLY

SUCCESSFUL & CONCERNED

LEAST IMPACTED FINANCIALLY

A2. How much do you agree or disagree with the following statement? [% agree strongly/agree]
A4. Which, if any, of the following did you experience as a result of the coronavirus pandemic?

For many women, the pandemic has made them reevaluate priorities

56% The pandemic has made me realize what is really important in my life

39% I have made changes to the way I live that will last long after the coronavirus pandemic is over

REALIZATIONS DURING THE PANDEMIC

I can spend less on things I don't need and still be happy **(52%)**

I have enjoyed a slower pace of life **(42%)**

The pandemic has made me want to live close to my family **(38%)**

The pandemic has made me reconsider the location where I live **(18%)**

A2. How much do you agree or disagree with the following statement? [% agree strongly/agree]

Women are focusing even more on interpersonal connection

> *Like many of us, I've come to value my relationships more… I'm less interested in accumulating things and more interested in doing things.*
>
> — **Cathy W., 63**

PSYCHOLOGICAL PERSPECTIVE

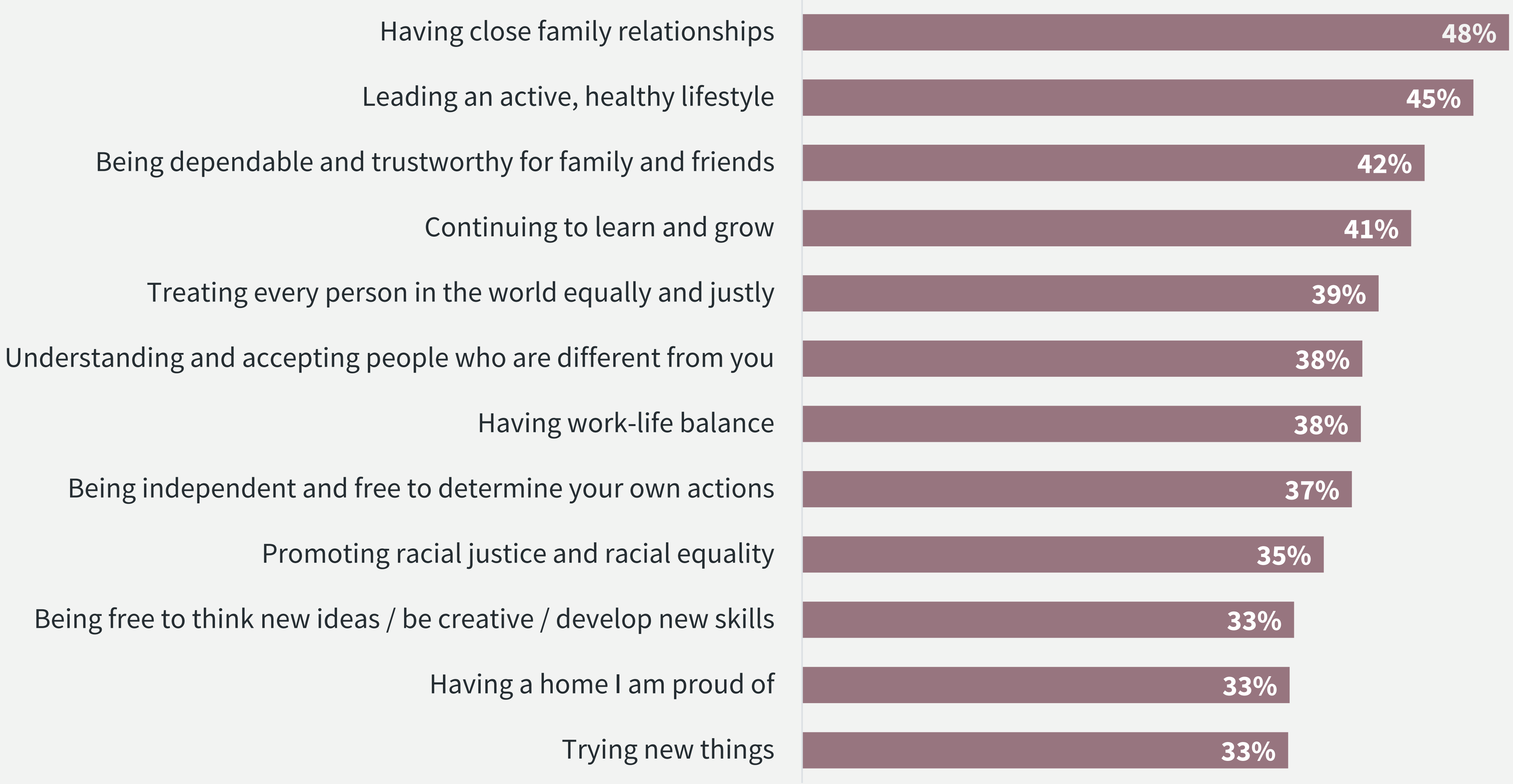
When faced with a threat, women closer to the pandemic will respond with avoidant reactions, slowing down and reevaluating priorities.

There is a *fundamental shift in motives from personal achievements and status to relationships and connecting with others*.

BRAND IMPLICATIONS

Brands that reach women most impacted by the pandemic should emphasize connection with others and dependability over personal success and status.

Top values and priorities that are more important since the pandemic began…



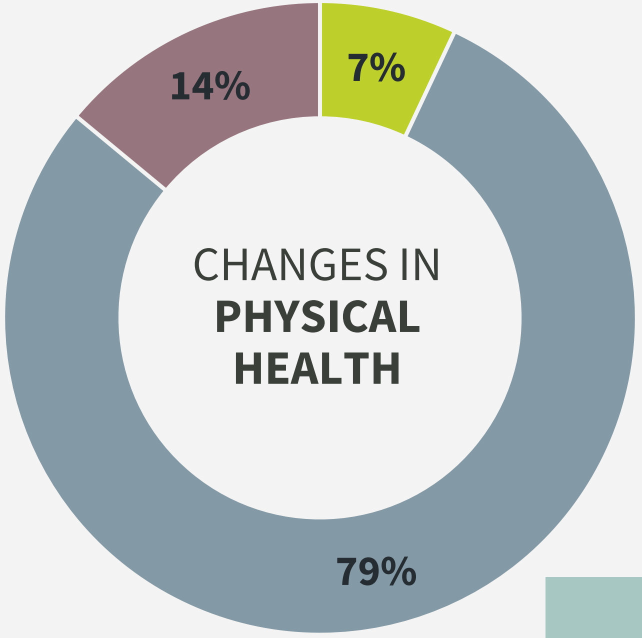
Y3. Since the coronavirus pandemic began, has each of the following become more important, less important, or no change in importance to you?
[% much/somewhat more important since pandemic began]

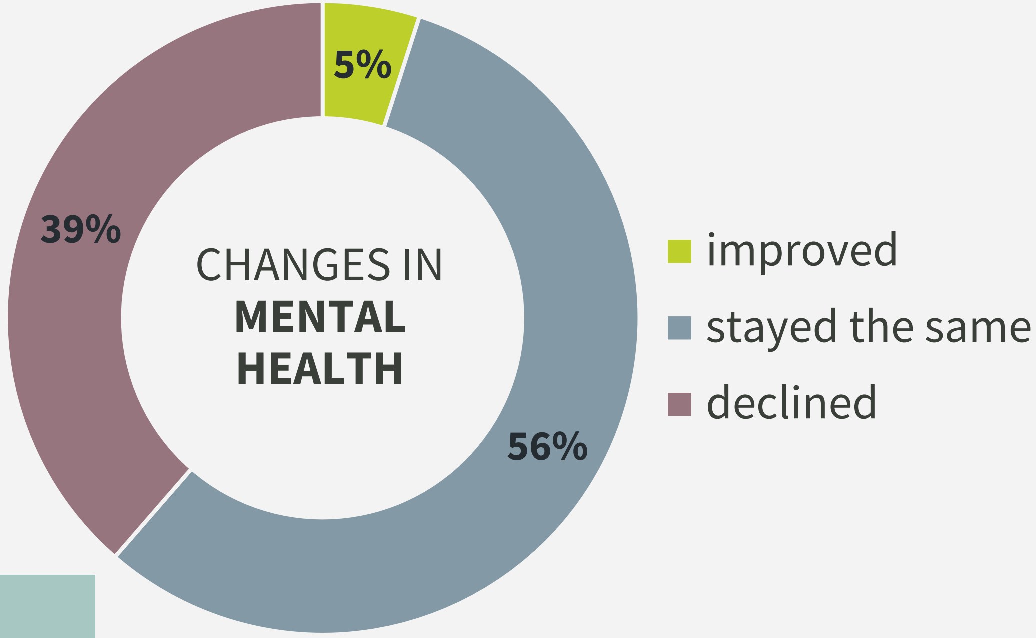

HOW HAS
PHYSICAL &
MENTAL HEALTH
BEEN AFFECTED?

Women saw a greater decline in mental vs. physical health

14% felt their **physical health** had declined during the pandemic

39% felt their **mental health** had declined during the pandemic





YOUNG & VULNERABLE

23% report a decline in physical health
58% report a decline in mental health

L1. How would you rate your physical health before and during the coronavirus pandemic?
L2. How would you rate your mental health and well-being before and during the coronavirus pandemic?

About half experienced depression symptoms in the past two weeks

young, single, urban women were most affected

47% felt little interest or pleasure in doing things

GEN Z: **68%**
MILLENNIALS: **51%**
SINGLE: **58%**
URBAN: **53%**

49% felt down, depressed, or hopeless

GEN Z: **70%**
MILLENNIALS: **52%**
SINGLE: **63%**
URBAN: **53%**

16% are considered depressed, according to CDC criteria

ER2. Over the last 2 weeks, how often have you been bothered by the following problem?


WHAT DO WOMEN
WANT FROM
BRANDS &
ADVERTISERS?

Consumers want brands to focus on both their needs as well as brand quality

94%

*It is important to me for brands and companies to continue to **focus on product quality***

strongly agree: **53%**

94%

*I appreciate brands and companies who are **listening to** and **acting on consumer needs***

strongly agree: **48%**

B1. How much do you agree or disagree with each of the following statements? [agree strongly/agree somewhat]

BRANDS & ADVERTISERS

Consumers are split on advertising focused specifically on the pandemic

49%

do not want to see advertising focused on the pandemic

higher among…

RURAL 63%
REPUBLICAN 69%

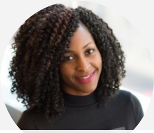
GEN Z **51%**
MILLENNIALS **50%**
MARRIED **52%**
WHITE **57%**
MIDWEST **58%**
NON-SOUTH **52%**
ESSENTIAL WORKERS **54%**

CONSERVATIVE VIRUS SKEPTICS	DIVERSE & AT-RISK
94% agree	**9% agree**
index 191	index 18

B1. How much do you agree or disagree with each of the following statements? [agree strongly/agree somewhat]

Women want a mix of advertising messages

highest among...

index **124** index **122**

67% want brands to provide an **appropriate mix of uplifting and serious** content

index **293**

24% want brands to offer a **welcome uplifting break** from the seriousness of the virus

index **128** index **132**

8% want brands to be **toned down** to reflect the seriousness of the pandemic

PSYCHOLOGICAL PERSPECTIVE

For people who want uplifting messages, the positive emotion connected to them is also associated with wanting easy-to-understand information. Positive emotion leads people to expand their scope of attention to information but reduce attention to specific details.

With uplifting content, the ideal pairing would be a message with one central theme associated with a positive goal for consumers, rather than messages that include different things to consider or multiple steps to achieve a goal.

B2. Considering the current climate in the coronavirus pandemic, what do you think the tone of advertising should be?

Advertising should be positive and forward-focused

and brands must continue to focus on product quality

78% appreciate advertising that focuses on how we are **all united as Americans**

68% are interested in advertising that shows how we all can **emerge from pandemic even stronger**

66% wish brands would **just talk about the benefits of their products** rather than the pandemic

agreement with this statement varies greatly by segment






CONSERVATIVE VIRUS SKEPTIC	FINANCIALLY CHALLENGED	HEALTHY & OPTIMISTIC	YOUNG & VULNERABLE	SUCCESSFUL & CONCERNED	DIVERSE & AT-RISK
index 146	index 124	index 115	index 72	index 68	index 56
HIGHEST AGREEMENT					LOWEST AGREEMENT

B1. How much do you agree or disagree with each of the following statements? [agree strongly/agree somewhat]

Most women will continue to shop online post-pandemic

once the pandemic has ended, I will be shopping online…

more often	same amount	less often
22%	66%	12%

highest among…

YOUNG & VULNERABLE
index 137

DIVERSE & AT-RISK
index 131

RESTLESS MILLENNIALS
index 121

V4. Compared to the online shopping you are currently doing, are you going to be shopping online more, less, or the same amount once the coronavirus pandemic has ended?

Women miss favorite brands that they can’t find

77%

can’t wait for their usual brands to be more readily available than they are right now

B1. How much do you agree or disagree with each of the following statements? [agree strongly/agree somewhat]

But many have been happy with the new brands they have discovered

I have purchased new brands or products since the pandemic began…

and will continue to purchase them after the pandemic is behind us	58%
but will be happy to return to my tried-and-true favorites after the pandemic is behind us	49%

highest among…

YOUNG & VULNERABLE
index **131**

MILLENNIALS 61%
GEN Z 67%

CONSERVATIVE VIRUS SKEPTICS

skeptics, who tend to be less adaptable, are least likely to have tried new brands or products
continue to purchase: index **66**
return to tried-and-true: index **74**

B1. How much do you agree or disagree with each of the following statements? [agree strongly/agree somewhat]

Household staples lead the list of brands they will return to, while pandemic needs add new favorites they will keep

49% will go back to tried-and-true favorites

among those returning to their most-loved brands...

TOP CATEGORIES	
paper products	43%
cleaning products	40%
food + non-alcoholic beverages	30%
personal care	24%
beauty	16%

58% will continue to purchase

among those continuing to purchase new brands...

TOP CATEGORIES	
cleaning products	53%
paper products	51%
food + non-alcoholic beverages	46%
personal care	43%
beauty	32%
over-the-counter remedies	27%
clothing and accessories	25%
streaming services	25%
alcoholic beverages	20%
pet food and supplies	19%

B4. From which of the following categories have you purchased new brands / products since the coronavirus pandemic began, but will be happy to return to your tried-and-true favorites after the coronavirus pandemic is behind us? [total mention]

RESEARCH TEAM

LYNN BALIK

ANDY BORINSTEIN

BRITTA CLEVELAND

MARIA DESIO

EMILY FLEISHMAN

JOEL KAJI

CYNTHIA WALSH

DR. JOSHUA ACKERMAN
(UNIVERSITY OF MICHIGAN)

QUESTIONS? contact
postnormalstudy@meredith.com

THE POST-NORMAL CONSUMER:
NAVIGATING AN UNCERTAIN PRESENT & FUTURE

KEY FINDINGS

FEBRUARY 2021

data studio