

(New) Consumer Health behaviors due to COVID-19: what will stick?

Changing consumer needs and behaviors create shifting brand expectations



Throughout this COVID-19 crisis, much has been researched and theorized. Out of all this data, what are consumers' truly hidden tensions and challenges of everyday life? With COVID-19 regulations easing and tightening constantly, the world is trying to find a new balance. Needs and expectations of brands shift. Within this changing landscape, we tried to uncover some of the behaviors customers want and need from brands now and for the future.

In recent global qualitative research, Kantar looked cross-culturally at consumer needs and behaviors which are adopted due to COVID-19, and which changing needs and behaviors will stick in the future. It will provide insights into what this means for your brand.

This whitepaper offers a quick glance into the behaviors of consumers when it comes to health and changing habits for the future and is part of a larger research project conducted by Kantar on a global scale. The research focused on topics including health, relationships, money, work, leadership, and entertainment. If you are interested to learn more about this research, [click here](#).

Health has become more than eating healthy and exercise, and it's no longer your exclusive responsibility.

Perception of health has changed because of the

COVID-19 crisis. Many of our beliefs have been debunked. There has been a mind shift from:

- A focus on the body exclusively, to a more holistic view of mind-body well-being. People are now motivated more than ever to focus on a healthy mind.

"More time to rewind and relax on your mental health, even if it involves sleeping more. So, it's a work life balance. Healthwise, I have definitely improved." - Pakistan

- A shift from 'my health is my business and I am in control' to 'everyone is vulnerable to the new-age diseases.' Class, money, age, caste are no longer perceived as barriers to becoming ill. Your personal health is strongly connected to the health of your environment.

"You cannot depend on anybody if you fall ill, so it's best to protect yourself from illness". -India

- Health was limited to being about eating well and exercising. Now hygiene plays a lead role in the new definition of health. Health also now includes cleanliness, immunity boosting behaviors (vitamins, meditation), sleep and mental health (including social connections). At the beginning of the pandemic, people felt more vigilant and more concerned with hygiene than now, especially across younger age cohorts (<45).

"I have stopped buying meat because the butcher man handles it with his bare hands. I don't know if he has the virus or not." -Kenya

"Many people spit on the roads without thinking because that's the way it has been. Now we know that it's dangerous." -China

New health routine and behaviors rise where old ones slide

We see new health behaviors because of the corona crisis and ensuing lockdowns. People are more persistent in behaving in a way that's beneficial for their health, in the new definition of health.

Some of the behaviors we see and we expect to stick:

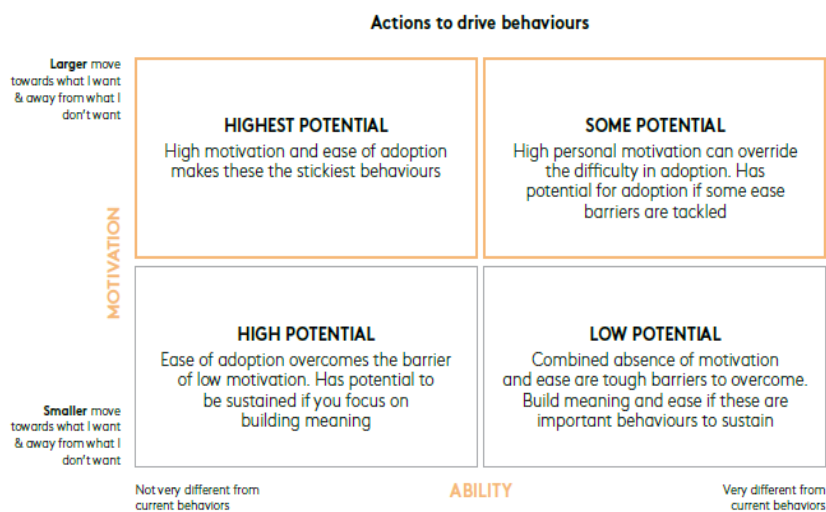
New behaviors
New routines around handwashing, disinfecting / home cleaning and mask wearing (new in the West; previously done in the East due to pollution)
Mindful cooking at home with fresh ingredients
An increase in motivation to exercise (yoga, meditation in places like India, Hong Kong and virtual exercise platforms on the rise in places like the United Kingdom)

"We have started washing vegetables with warm water and we will continue to do so in the future as it is a matter of hygiene." -India

"People will start to prioritize mental and physical health and start to change the way they work – exercise more and work flexible hours." -Australia

What drives behavior and what makes some stick?

At Kantar, we have a model to anticipate stickiness of behavior in the future. Behaviors with the highest potential to stick are behaviors that score high on motivation and high on ability or ease of adoption. Behaviors with the least potential to stick are those behaviors for which there is an absence of motivation and sustaining them is difficult.



Understand what makes a behavior 'stick'; the five currencies of motivation and the three of ability.

During the pandemic, even though behaviors are 'forced' upon us by the government, we tend to move towards those behaviors that take the least cognitive effort in the long term. Even with similar rules and legislation across countries, the behaviors we implement and continue easily doing is driven by culture, people's internal and external motivations, and our practical or financial ability to implement them. To understand what health behavior will stick with consumers in the future, we therefore must take a closer look at the currencies of ability and motivation that are at play.

Ability is determined by three ability currencies:

- * cultural fit
- * practical ease and
- * cognitive ease

The level of motivation is shaped by five currencies:

- * money
- * time
- * connection
- * vitality and
- * safety

Consumer behavior that works in a positive way on the ability and motivation currencies has high potential to stick in the future.

One example of high potential (very sticky) behavior is cooking at home with fresh ingredients. Consumers learned new routines and discovered the ease and joy of cooking during the pandemic. Looking at the model below, you can see it works positively on the motivation currencies; money, connection, vitality, safety. Cooking for yourself (instead of going out to eat) saves money.



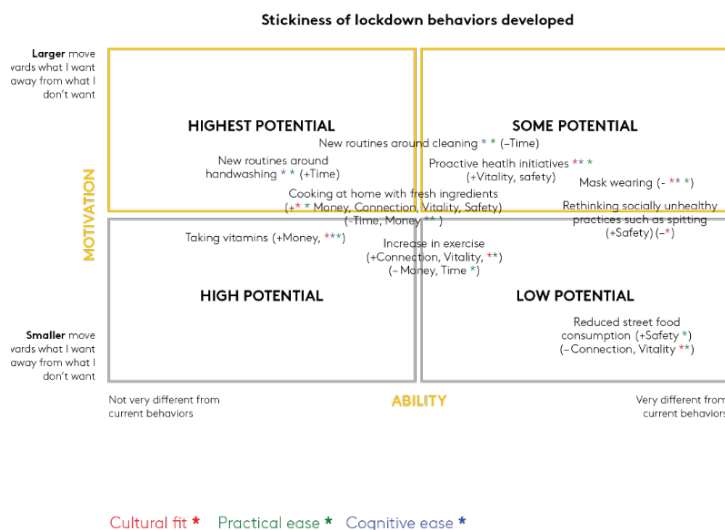
Cooking is a stress reliever and contributes to staying healthy. It's a way to connect with family and close friends and is done in the safe and comfortable environment of people's homes. Although barriers to go out for dinner will be lifted after the pandemic, cooking at home is likely to be a behavior with high potential to stick, because it works positively on many of the other motivation and ability currencies that drive the behavior.

"Many women, including myself, are using this time to cook, make sweets, and invent some things in the kitchen." -KSA

"I love that we have so much more quality time as a family. I love cooking together on the campfire in the garden." -Netherlands

Are these new health behaviors future proof?

Stickiness of Health behaviors in the 'future'



What effect do these new behaviors have on your brand (strategy)?

As we spend more time in our homes, health and self-care has become a central focus point in the lives of consumers. As consumers are adopting new health behaviors, this has a direct influence on business at large. So, what does this mean for certain industries?

For example, one of the most affected industries by the COVID-19 pandemic is the travel industry. Most consumers are reconsidering their options for travel. Instead of taking an airplane and traveling long distances, consumers feel a need to stay more local, travel with their own means of transportation, or take the train. This behavior is not only driven by a fear of a potential new

lockdown, but also the fact that air travel is now seen as a high-risk, and exasperating mode of travel.

The real question remains: what behavior is going to stick in the future? Answering this question accurately can have major advantages. Airlines could invest in new services that would drive preference in the future. Communication campaigns can reassure, but also reignite consumers' drive and need for travel and new experiences. Finding the right tone of voice to communicate about health procedures and travel that really resonate with the needs of consumers is key during this pandemic. By using Kantar's stickiness model of behavior, we can explore and give guidance on changing attitudes and behaviors.

Airline companies have already tried to give consumers a renewed sense of security by communicating about their health procedures, such as masks, hand sanitizers, and cleaning procedures. However, other major barriers are not addressed. Consumers are not only worried about safety in the airplane, but the overall procedures and safety in the airport lounges. Or worried about what would happen if there appears a new lockdown. If you know what behavior will be continued in the future, one could invest in services that would lower these barriers. Such as investing in a special access ticket to the business lounge for extra security and comfort or providing consistent and easy to understand information about security rules and regulation to the country of destination. Or design a guaranteed back-to-home service package.

"Even if the government says it's okay, we will not travel till the end of the year because it may not be safe. - Hong Kong

"What if we book a holiday and this pandemic return? What happens to all our money then?"-United Kingdom

"I'm more cautious about traveling, whether it's staying in hotels or flying, even riding the bus. I think that it's a lot more dangerous. So, I try not to travel unless it's in my own vehicle." -United States of America

Global Qualitative COVID-19 Deep Dive

To prepare this study, we made use of our extensive network across the globe. Multiple countries participated, including Australia, China, Pakistan, Kenya, the Netherlands, India, Russia, Mexico, Indonesia, United Kingdom, Hong Kong, and Saudi Arabia. We spoke to consumers in all these countries through online in-depth interviews. For us to understand the magnitude of the Covid-19 crises, the consumers were a mix of all ages and living situations.

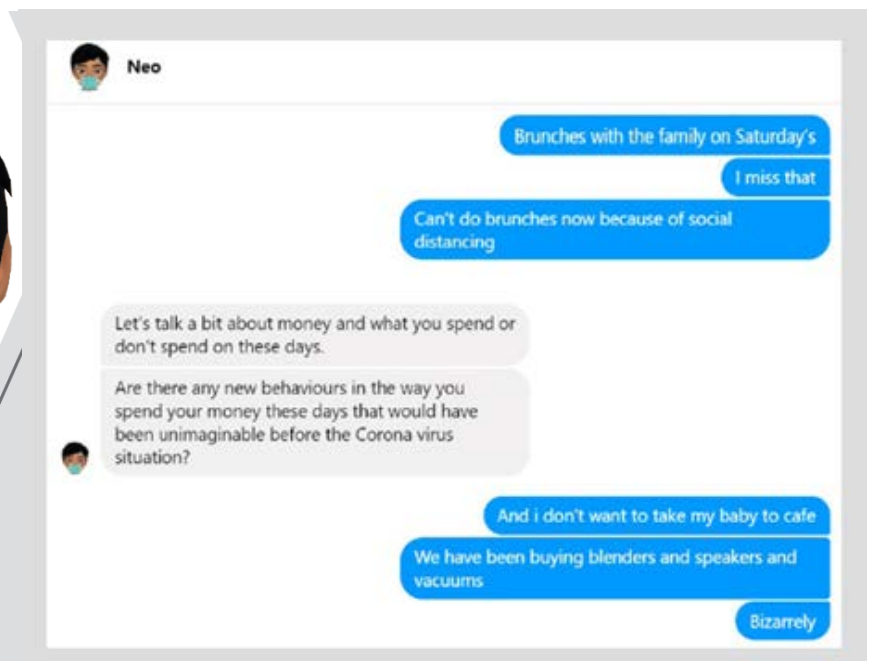
Along with these conversations, we conducted a chatbot based in conversational Artificial Intelligence in five of the twelve countries: Netherlands, India, United Kingdom, Hong Kong and Saudi Arabia. The Chatbots "Neo" and "Nur" were tailored to fit each market and created a safe space for people to easily share their experiences. Within three days, we "spoke" to more than 1,600 people for an average of 15-20 minutes each.

We leveraged the truly global networks at our disposal at Kantar, along with the transformative technological innovations such as chatbots to delve into consumers' realities.

Neo is a Kantar developed chatbot, trialed in this study across select markets



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Let's stick together

If you want to know more about how Kantar can help your business deep dive into your brands customer's needs and behaviors or anything about the methodology behind this research and what this could mean for your business, contact:

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