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Examining our lived experiences in the midst of an existential crisis

Across the following dimensions:



RELATIONSHIPS



ENTERTAINMENT



WORK



MONEY



LEADERSHIP

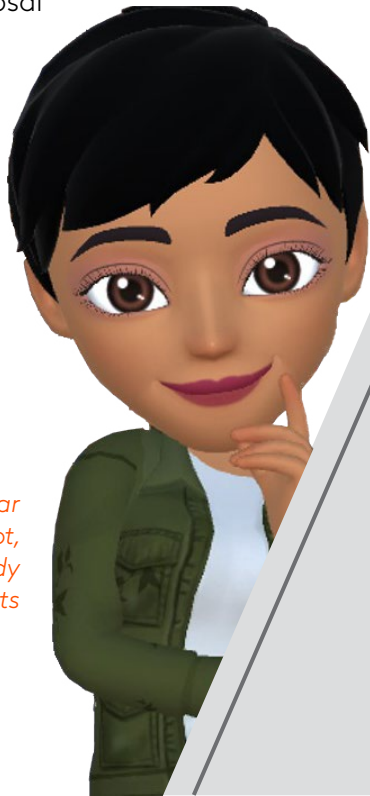


HEALTH

A look at key dimensions across the globe

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



Australia



China



Pakistan



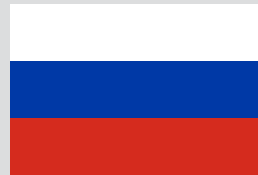
Kenya



Netherlands



India



Russia



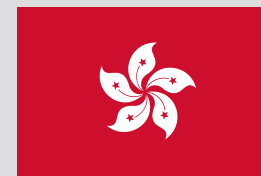
Mexico



Indonesia



United Kingdom



Hong Kong



Saudi Arabia



USA

Includes input from the US based on findings and data from other COVID-19 related studies in market

Chatbots Neo and Nur

Conversational AI leveraged in 5 markets

- Bot "avatars" tailored to markets
- Our target was $n \leq 300$
- Incentivised with digital vouchers in a prize draw
- Recruited with a combination of ad targeting on Facebook with limited screeners/demographic questions within the bot conversation
- Length of interview between 15 and 20 minutes

Sample collected over 3 days

- In Kingdom of Saudi Arabia, Nur spoke to 475 people
- In the United Kingdom and Netherlands, Neo spoke to 298 individuals
- 278 individuals were spoken to in Hong Kong
- And in India, Neo spoke to nearly 600 people!

KANTAR



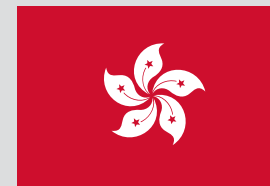
Netherlands



India



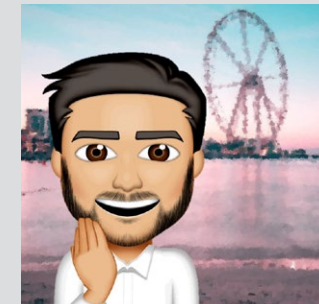
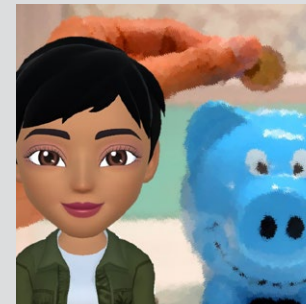
United Kingdom



Hong Kong



Kingdom of
Saudi Arabia





Cultures in crisis

We know that values and belief systems influence behaviour. But what does this mean in times of crisis?

We looked at people's lived experiences through the lens of the key cultural value orientations.

For instance, the motivation to wear a mask could be tied to whether or not a person comes from a culture that values self or others more. Someone coming from a largely individualist culture might wear a mask to protect themselves from catching the virus (United Kingdom). Whereas someone coming from a culture that values group wellbeing over self, might wear a mask to protect others from their germs (China).

Then again, there are cultures where illness can be a source of social stigma (India) and those where illness is a sign of personal weakness (United States of America). Which association is dominant has roots in how disease is coded in each culture.



We looked at markets through key value dimensions (Hofstede, Hall)

And then went onto look at how this underlies current COVID-19 behaviours and future tensions ...

Power distance



Do existing social hierarchies or egalitarian attitudes influence on the ground realities for people?

Individualism versus collectivism



Does a culture with a focus on oneself versus an emphasis on group welfare impact behavioural response?

Low context versus high context



Are rules, norms and expectations within these societies explicit, or is behaviour enacted from a shared understanding of expectations - what does this mean during the COVID-19 crisis?

Openness versus aversion to risk



How open or averse is the culture to risk and what does it tell us about cultural response toward crisis management?

Understanding cultural codes

Mexico



↑
CLICK
FOR
NOTES



surviving together
dense populations traditional
family
hierarchical
elders must be cared for
life is a celebration
physical closeness
religious touching

Understanding cultural codes

Australia



↑
CLICK
FOR
NOTES

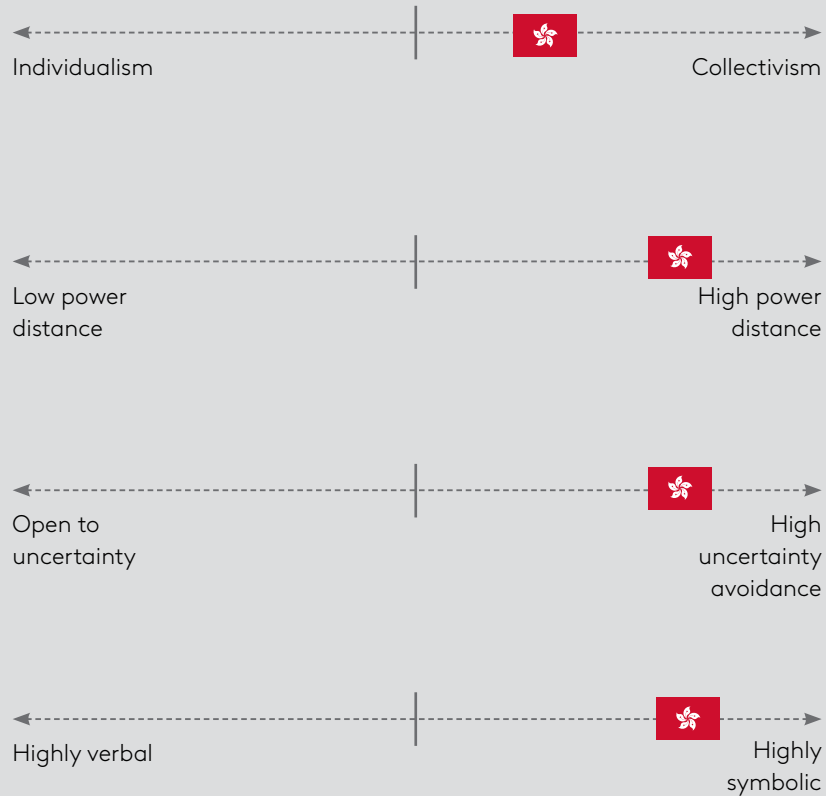


Understanding cultural codes

Hong Kong



↑
CLICK
FOR
NOTES



respect

welcome respite

acceptance among peers

saving face

packed

eastern-western

living quarters

mix

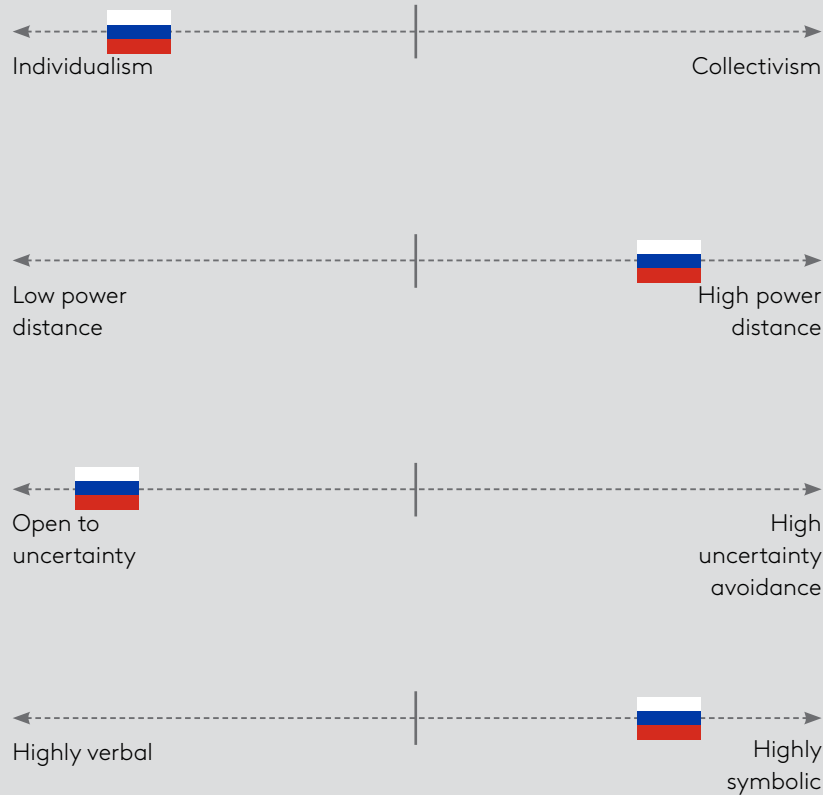
self-worth

Understanding cultural codes

Russia

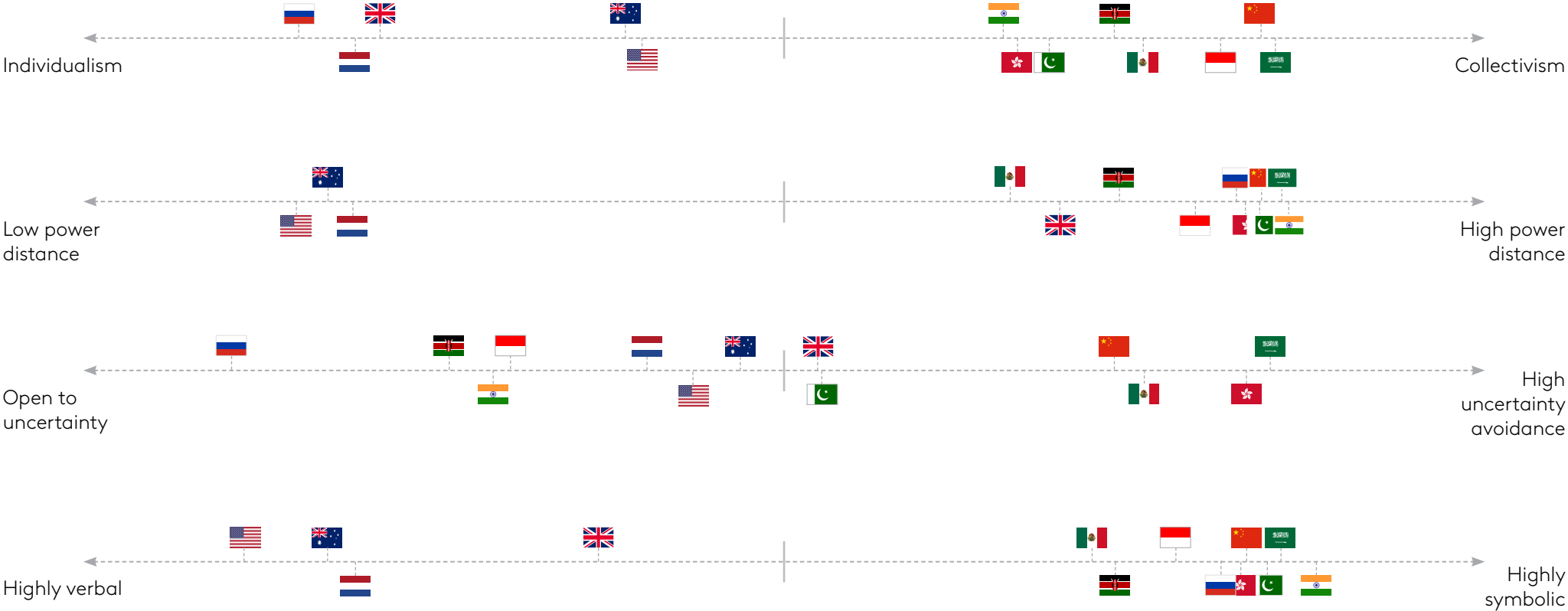


CLICK FOR NOTES



beautiful landscapes
authority structures
toughness
patriarchal
health is personal
focus on here and now
enjoy the moment
disease is taboo
elite behaviour from officials

How the markets compared



Select country for further info >

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A NeedScope lens to map cultural dynamics during the pandemic

At the heart of our behaviour and needs, is a sense of vulnerability. Therefore this model is about how we deal with vulnerability at this point in time. One of the key dynamics is the look towards liberty and freedom on end, versus solidarity and community.

This means that the right hand side of the model is about individualism and self determination, where as the left is focussed on a collectivist, community orientation, in times of vulnerability and crisis.

The top, then, is about how comfortable we feel with risk, ambiguity and our feelings of vulnerability at this time, whereas the bottom is the opposite of that – an aversion to uncertainty.



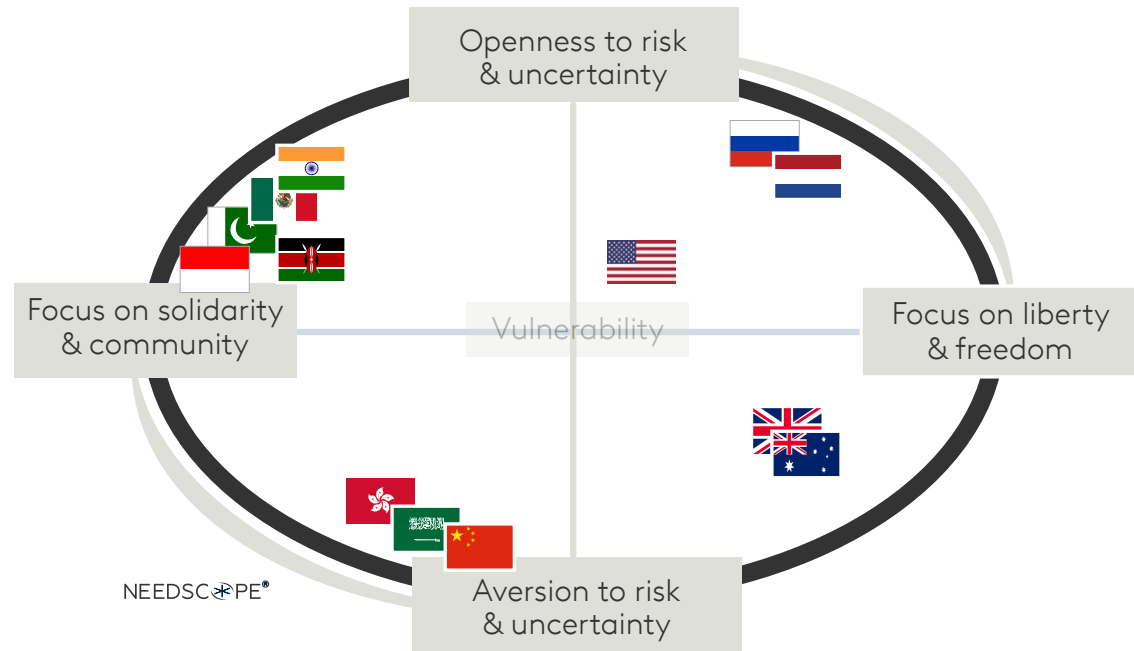
NeedScope offers a framework that can map cultural dynamics

Whilst, looking at our global response at a vulnerable time, on the left hand side we see countries like **India, Mexico, Pakistan, Kenya** and **Indonesia**, which are collectivist cultures with a focus on togetherness. At the same time, the tolerance for uncertainty is fairly high, and people are weathered to life's harsh realities.

Still on the affiliative left hand side, we have **Hong Kong, Saudi Arabia** and **China** which are also collectivist cultures but the openness to vulnerability is low, or in other words the risk aversion is very high.

On the right hand side, **Russia, Netherlands, the United Kingdom** and **Australia**, all individualistic countries with a focus on self determination – and most importantly liberty and personal freedom.

Yet with **Russia** and the **Netherlands**, there is a hardiness to risk – a sense that this too will be weathered, with a “can do” spirit. Whereas in the **United Kingdom** and **Australia**, there are clear rules and guidelines to mitigate risk.



	Pakistan		Hong Kong		India		Mexico		Russia		Saudi Arabia		
	Kenya		Netherlands		UK		Indonesia		Australia		China		USA

Cultural lens for brands and marketers

Marketers use universal taglines and themes that are synonymous with their brand, but may not resonate across different cultures. The cultural context determines how categories and brands behave. It is therefore important to understand and interpret the cultural code.

The cultural lens will give us a basis to understand the subtleties of individual cultures and how it ties in globally - and how the current crisis is therefore being expressed within in our world at the moment, the human truths and language that define and shape the present and the future.

A NeedScope lens for brands to unpack our behaviours, emotions, and future needs:

Underlying behaviors are driven by culture, society as well as individual emotional needs. Behaviours that are supported by emotive drivers are included in this section. [Click here to see more about how brands can help understand individual needs specific to this crisis, based on a framework that is informed by our cultural analysis.](#)



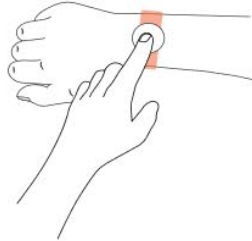


Relationships

The 5 currencies that will motivate habit adoption in the future



MONEY



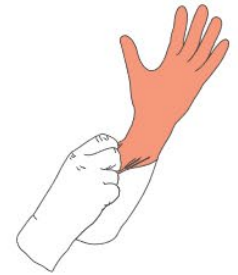
TIME



CONNECTION



VITALITY



SAFETY



Relationships

Ability: The 3 currencies that consumers work with

Cultural fit:

Resonates intuitively or mirrors existing customs thereby making it easier to adopt. Conversely, if it clashes with intuitive wisdom or existing customs, it is likely to be tougher to adopt.

Practical ease:

The ability to do this within current life routines

Cognitive ease:

The amount of mental (processing, research) effort required to adopt the behaviour

The factors driving motivation and ability

Motivation: The 5 currencies that consumers value



Money:

Liquidity, saving

Time:

For the things that matter and to be able to do more

Connection:

Discerning, authentic, and supportive relationships

Vitality:

A combination or one of – immunity, energy, wellbeing (mental health, physical fitness)

Safety:

Physical and financial safety



Relationships

Post-lockdown,
pre-vaccine,
socially distanced
phase

Behavior change potential for the 'future'

Post-lockdown, pre-vaccine, socially distanced phase

Describing the new behavior relative to the pre-lockdown behaviours

Larger move
towards what I want
& away from what I
don't want

HIGHEST POTENTIAL

I want to continue doing this
and I can

SOME POTENTIAL

I want to continue doing this but
it's difficult

MOTIVATION

Smaller move
towards what I want
& away from what I
don't want

HIGH POTENTIAL

I don't care but it's easy to continue
doing this

LOW POTENTIAL

I don't care and it's difficult to
continue doing this

Not very different from
current behaviors

ABILITY

Very different from
current behaviors

Want to know more? We're here to help



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