

HARTE
HANKS
Behavioral
Index™

The Vaccine Effect:

From Burnout to
Bounce-Back



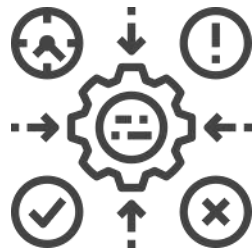
THE VACCINE EFFECT: FROM BURNOUT TO BOUNCE-BACK

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Emotion and its context are the keys to understanding and anticipating emerging behavior.

Context



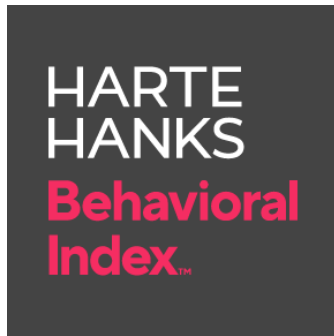
Emotion



Behavior



HHBI is a responsive intelligence platform that aims to predict what people will do next.



- Timeframe analyzed: February 11–March 11
- 2,637 people surveyed
- 125 brands indexed across key industries
- 20 brand diagnostics, assessing behavioral metrics and marketing drivers
- 1 billion social and search behaviors

Language Comparison



Audience Data



Shopping Data



Social Semiotics



Content Analysis



Consumer Sentiment



HHBI
Proprietary
Insight

A landscape photograph of misty, layered mountains. A large, bright red sun is rising behind the mountains, creating a strong glow and casting long, soft shadows. The text is overlaid on the sun and the mountains.

**This is the dawn of a new era
in human behavior.**

It's been called everything
from **The Great Pause** to
The Lost Year, yet it's been
anything but.

The momentum for the new world.

THE Epiphany Economy™

The epiphanies of the pandemic year are now
the engine driving behavior change...


...empowering us to **recapture** what we've lost
and to **remake** our world in new ways.



Behavioral ingenuity is now expected.

- Invention from nothing
- Speed to action
- Novel resourcing
- Equality activation
- Communal effort





**And yet, it's also left us
scarred, frustrated and
hanging on the edge, as
we wait in line for our cure.**

87%

say the vaccine is not being made
available quickly enough

What once was welcome is now tiresome.

The novelty is long gone.



**Harvard
Business
Review**

85% **55%**

said well-being
had declined

felt they were unable to
balance work and home lives

Source · Harvard Business Review, survey of 46 countries



A person is sitting on a patterned rug on the floor, looking out a large window at night. The person is silhouetted against the bright light coming from the window. Outside the window, a street scene with buildings and a car is visible. The person is sitting with their back to the camera, looking out the window.

**Burnout is “the other”
global health crisis
right now.**

43%

reported some adverse
mental health symptoms
because of this Covid year

Source • JAMA, NBC News



23%

reported drinking more alcohol

33%

reported anxiety and depression symptoms

50%

of parents gained as much as 36 pounds

AND THE LIST GOES ON:

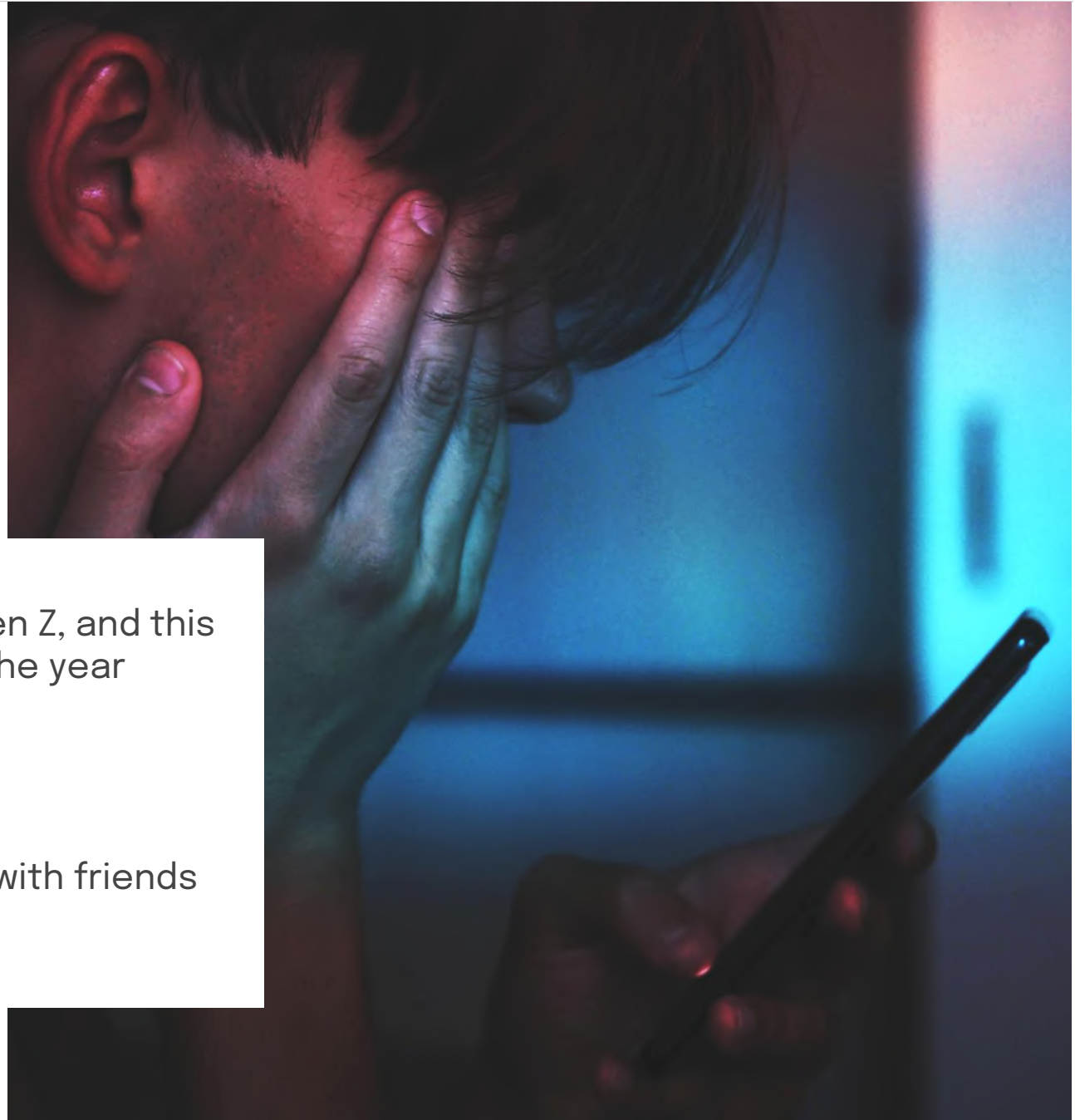
- Teeth grinding
- Repetitive stress injuries
- Sitting ailments
- “Maskne”
- “Dead butt”
- “Covid 15”

Gen Z has been the hardest hit by isolation.

46% of those who feel most isolated are Gen Z, and this has remained consistent throughout the year

25% more fearful than Millennials

59% had a great deal of change socializing with friends in the last few months and they hate it



THE WALL STREET JOURNAL.

To cope, people embraced new behaviors focused on touch and real connection...

24%

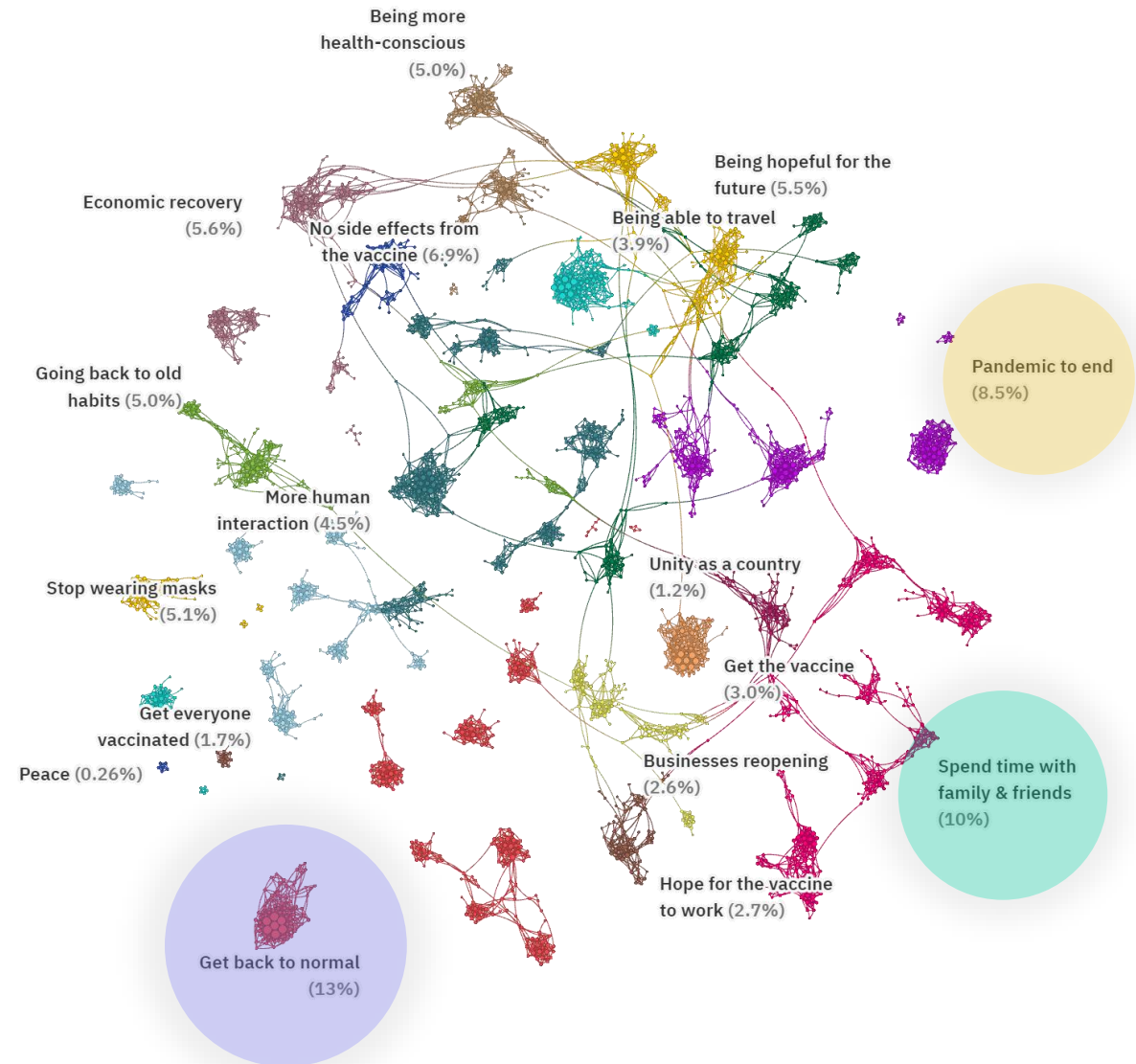
said they loved the change getting a pet brought to their lives during Covid

Need a Pandemic Puppy ASAP? Call the Bernedoodle Delivery People

We're looking to recapture what we've lost.

“

I hope that things return to normal so I can get back to my dreams.”



Our resolutions reveal a desire to reclaim ourselves in new ways.

Ingenuity is turning from public to private as we reframe our lives around health and humanity.



- 31%** Stand up for what I believe in
- 34%** Keep in closer contact with friends and family
- 35%** Get more sleep
- 35%** Be kinder to people
- 50%** Manage my money better
- 57%** Eat healthier
- 57%** Exercise more

Our minds shifted on December 8th

BBC

**Covid-19 vaccine: First person
receives Pfizer jab in UK**

🕒 8 December 2020



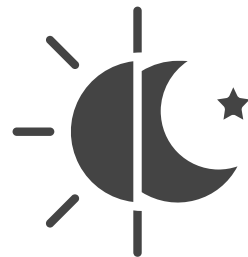
Overnight, we moved from a dream state to serious action.

Our language became stripped and utilitarian.

BEFORE VACCINE

24x

more likely to use dream state
and negative language

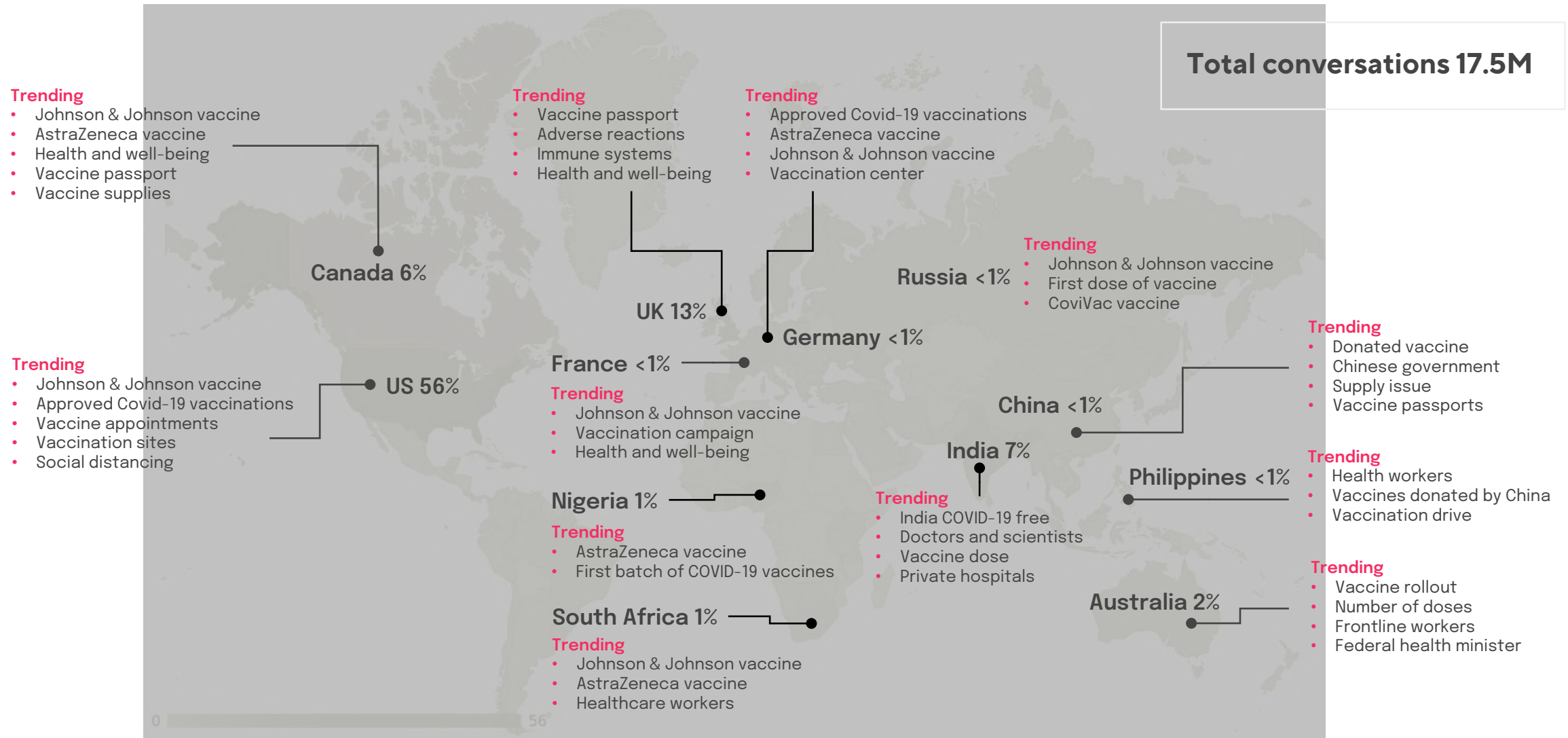


AFTER VACCINE

15x

more likely to use utilitarian,
explanatory, helpful language

The world turned to vaccine conversation.



Our behaviors became more serious, too.

We're already over-indexing on safety but have upped the ante further.

56% **50%**

said they are looking for new ways to keep their family healthy

(up 7 pts. from September)

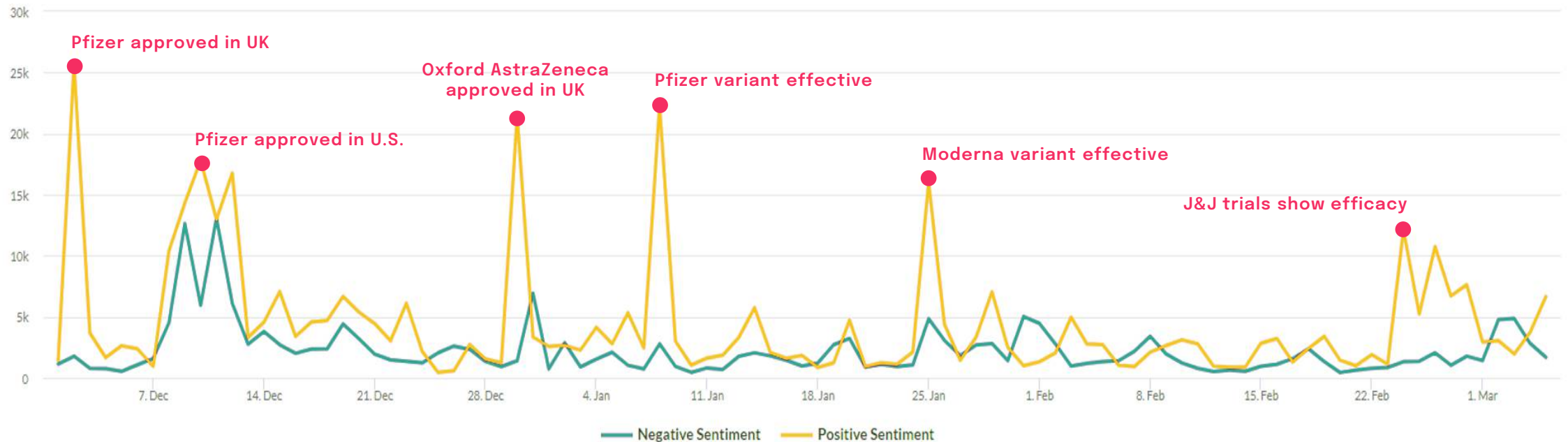
are much more mindful of the people with whom they connect



Since then, we've seen a drumbeat of positivity.

Repetitive positive vaccine announcements are creating a cumulative effect.

VACCINE MENTIONS



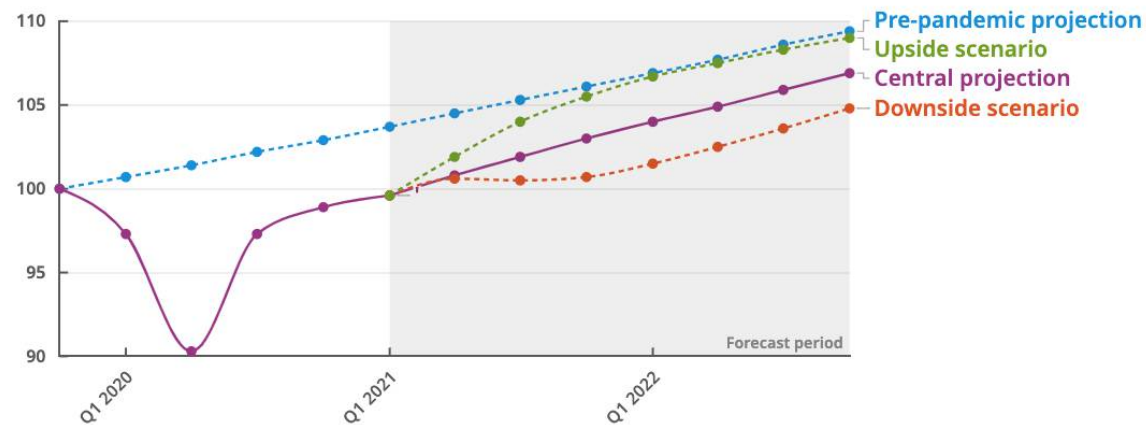
And economic models are following suit.

Analysts have lifted their forecasts as vaccine boosts confidence...

while **66%** of people believe it could take up to a year or more for economic recovery.

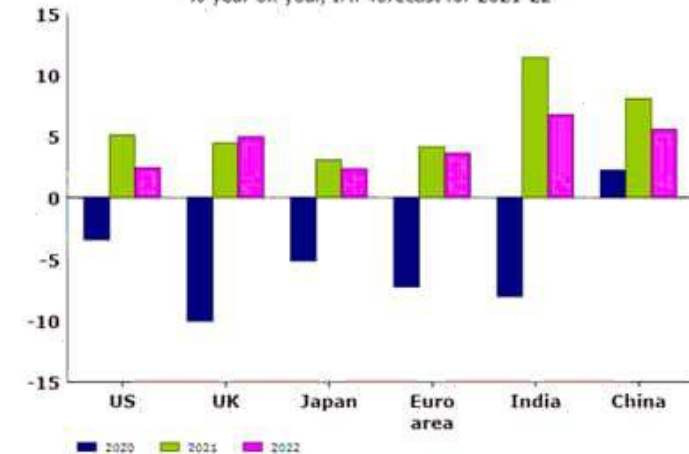
A global economic recovery is in sight

World GDP index (Q4 2019=100)



Major economies GDP growth

% year on year, IMF forecast for 2021-22



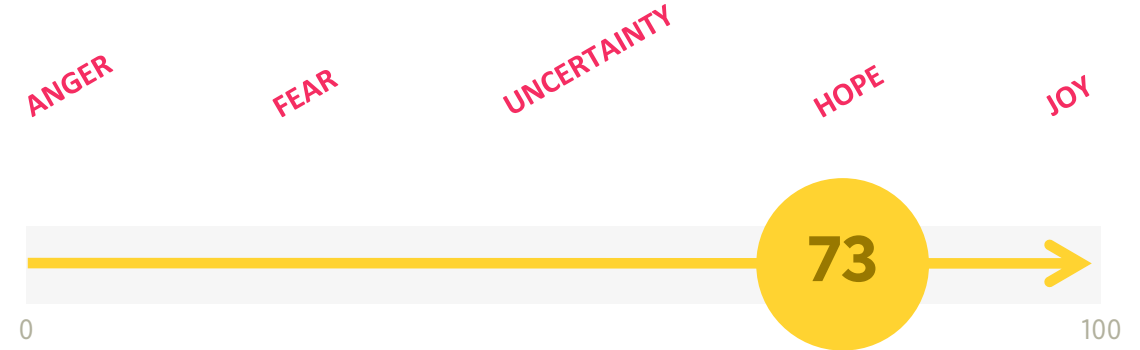
All of this is radically affecting our emotional state.

We've not seen numbers this positive for over a year.

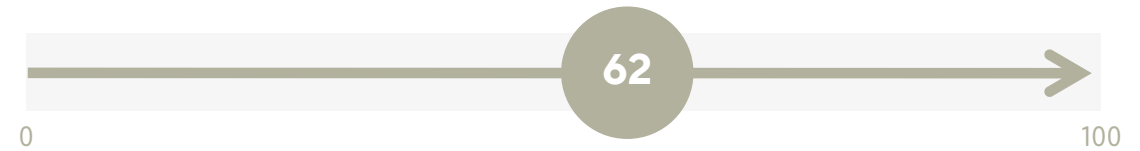
CURRENT STATE

Hope

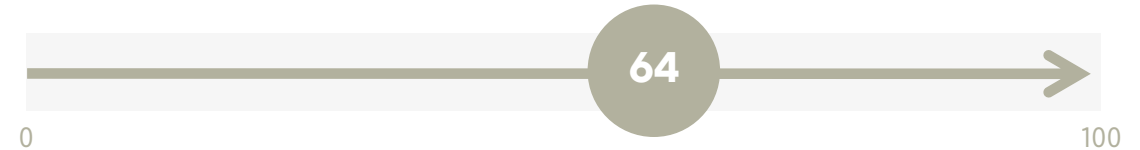
MARCH 2021



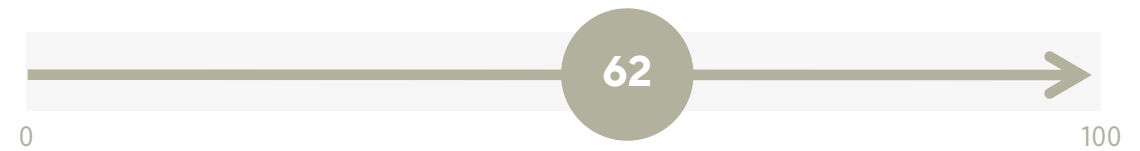
MARCH 2020



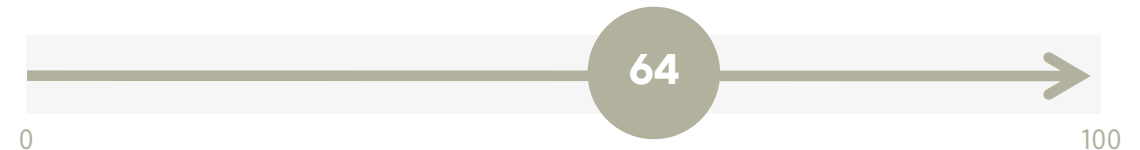
MAY 2020



JUNE 2020

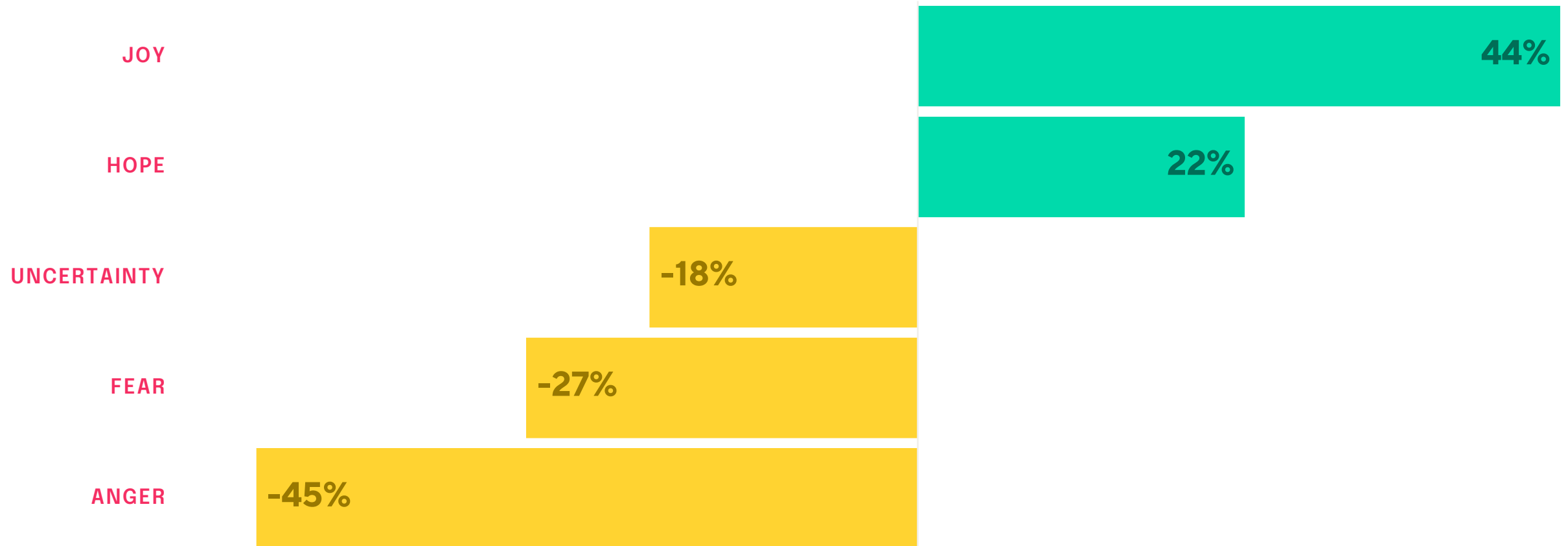


SEPTEMBER 2020

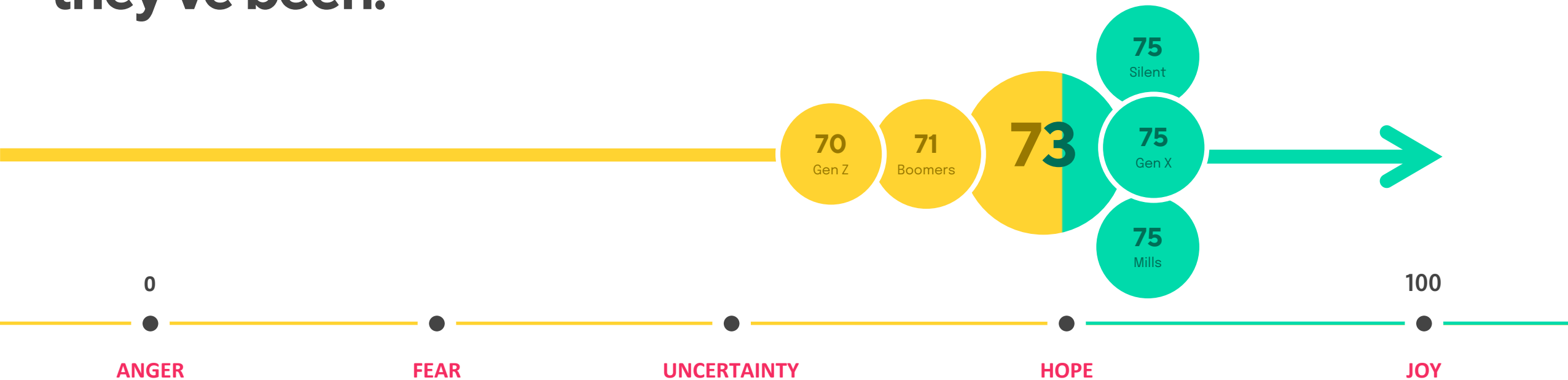


Hope and joy are taking over from the negativity and will drive a shift in behavior.

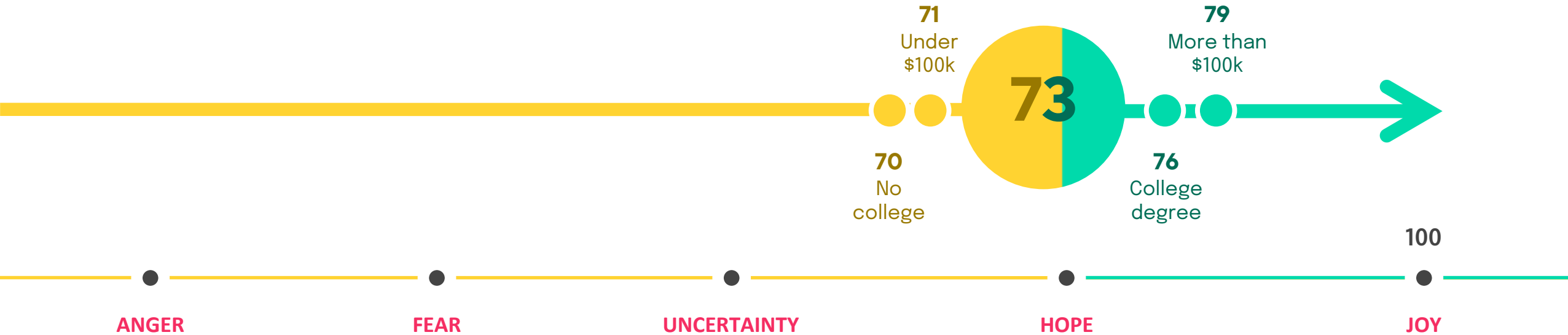
% change in mindset from September 2020



Gen Z and Boomers feel more uncertain than other generations but are still more positive than they've been.



There is a slight difference in degrees of hope between the rich and the poor.



Our brains change when we are hopeful. So does our behavior.

- Higher motivation
- Better problem solving
- More cognitively flexible
- Deal better with novel situations





**Hope is like mental time travel.
By imagining what you want,
behavior is unconsciously
structured to create it.**

5.4x

more likely to use language of expectation

As marketers, our job is to help them imagine
the future and set goals.

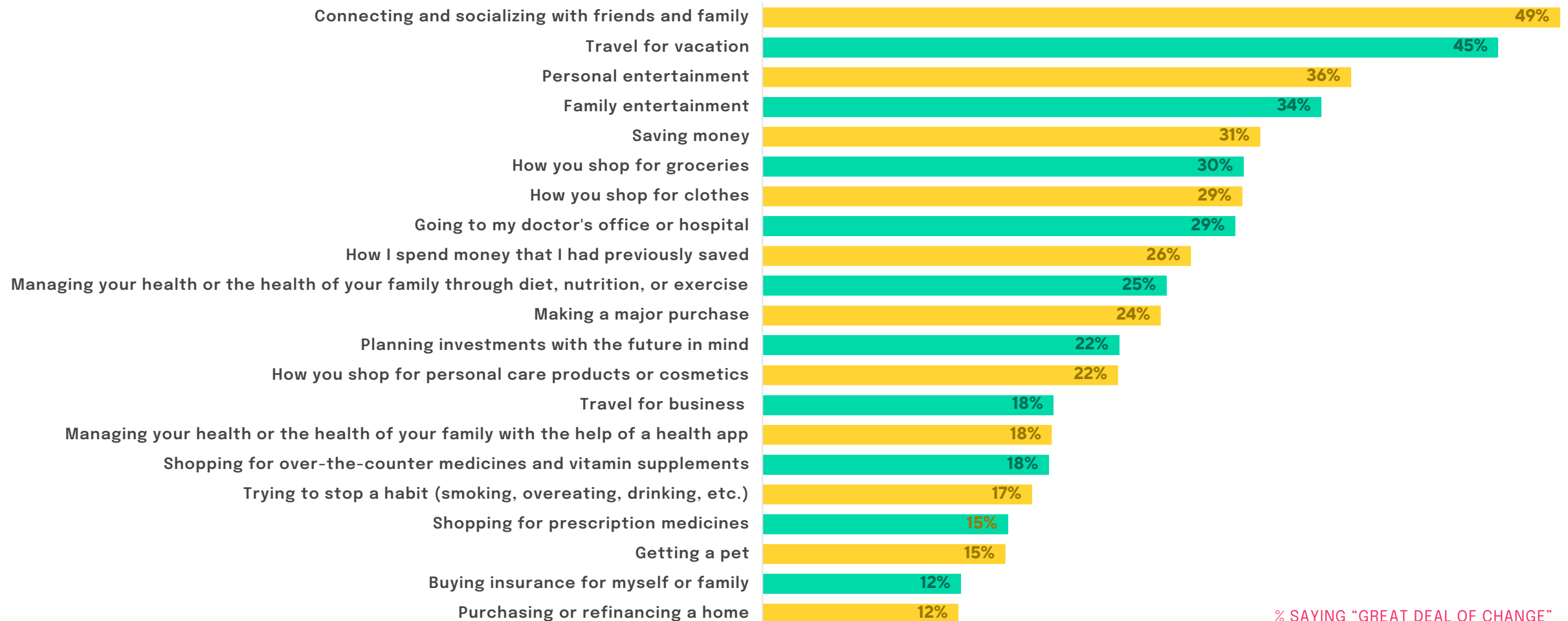
A look at the behavioral bounce-back and the future it holds.

The drive to reclaim ourselves through hope.



We're still dealing with a lot of change in our lives.

The intensity of change now compared with four months ago remains the same.

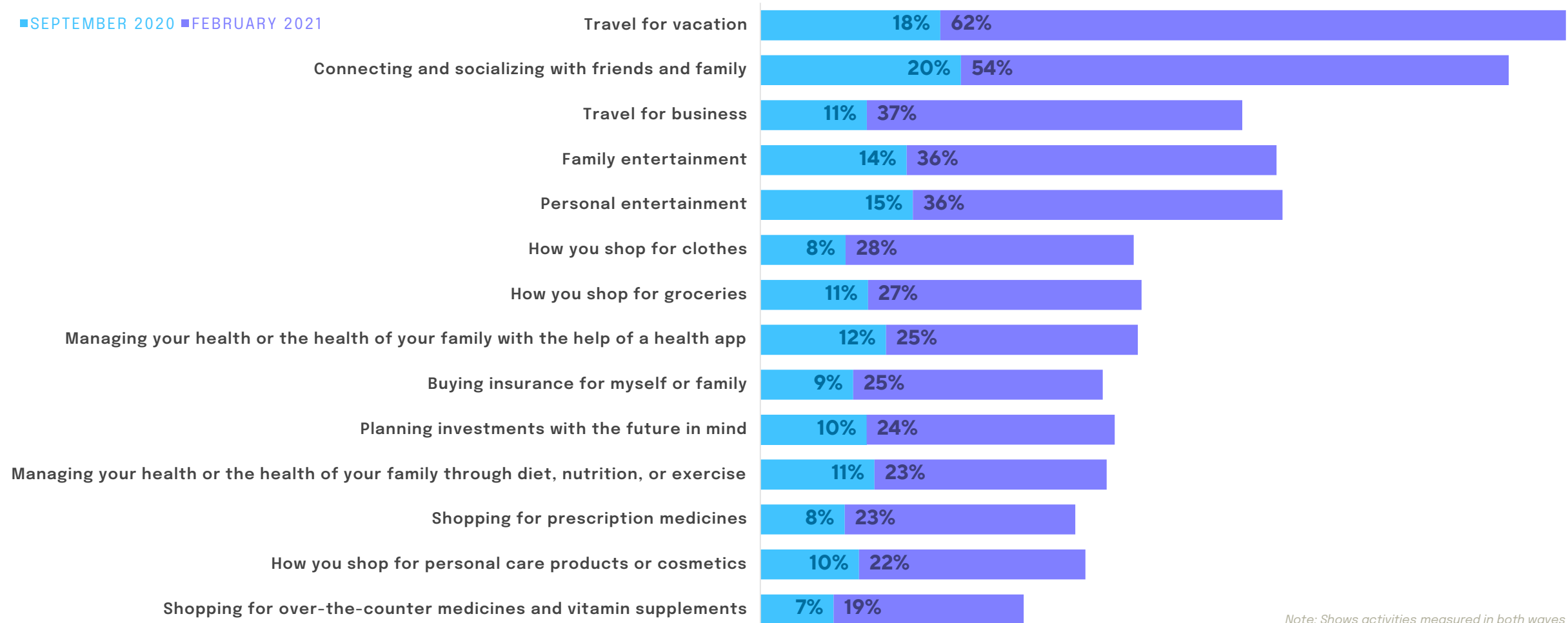


% SAYING "GREAT DEAL OF CHANGE"

But the discontent has intensified.

% “I hate the change”

■ SEPTEMBER 2020 ■ FEBRUARY 2021

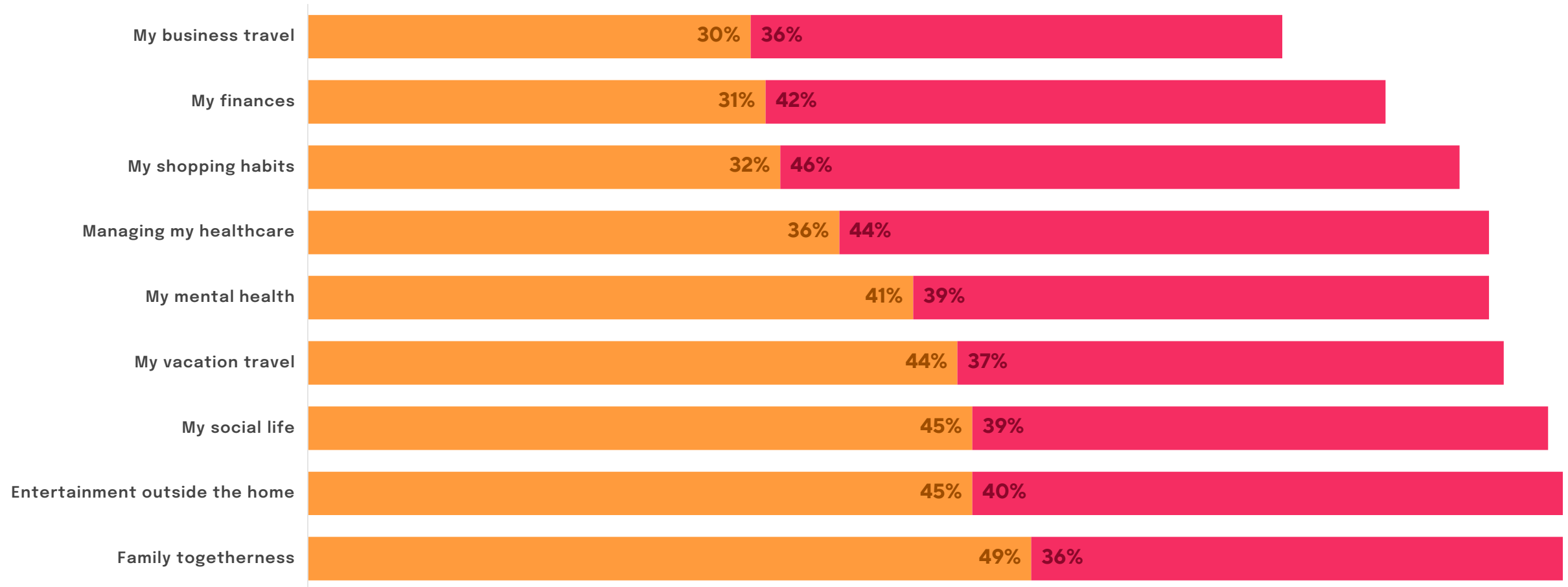


Note: Shows activities measured in both waves

As a result, expectations for the vaccine run high.

% feeling hopeful about vaccine's impact on aspects of their life

■ HOPEFUL ■ VERY HOPEFUL



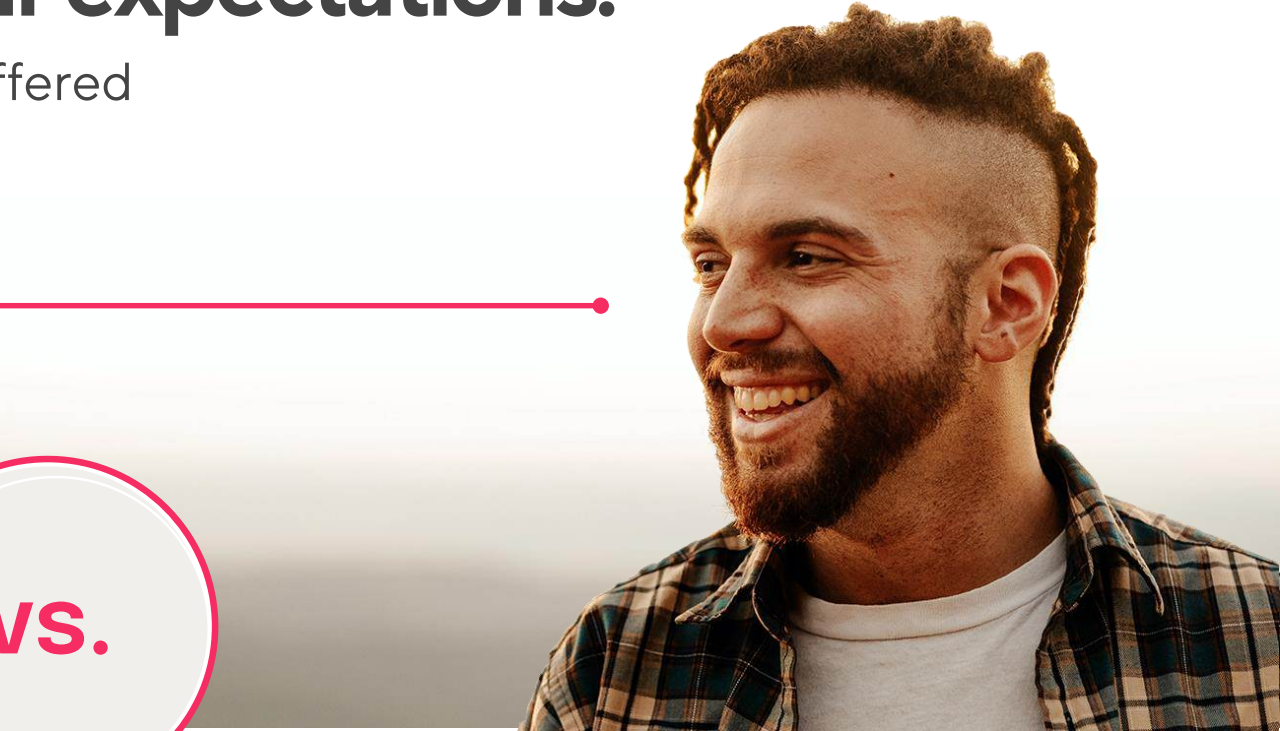
Women and men differ in their expectations.

While both are more positive now, women have suffered greater setbacks with work and childcare.

- More likely to talk about themselves and independent activities
- 1.7x more likely to talk about travel
- 4x more likely to talk about business travel
- Concerned about the loss of dual income
- 4.7x more likely to talk about economic recovery
- 10 percentage points more hopeful

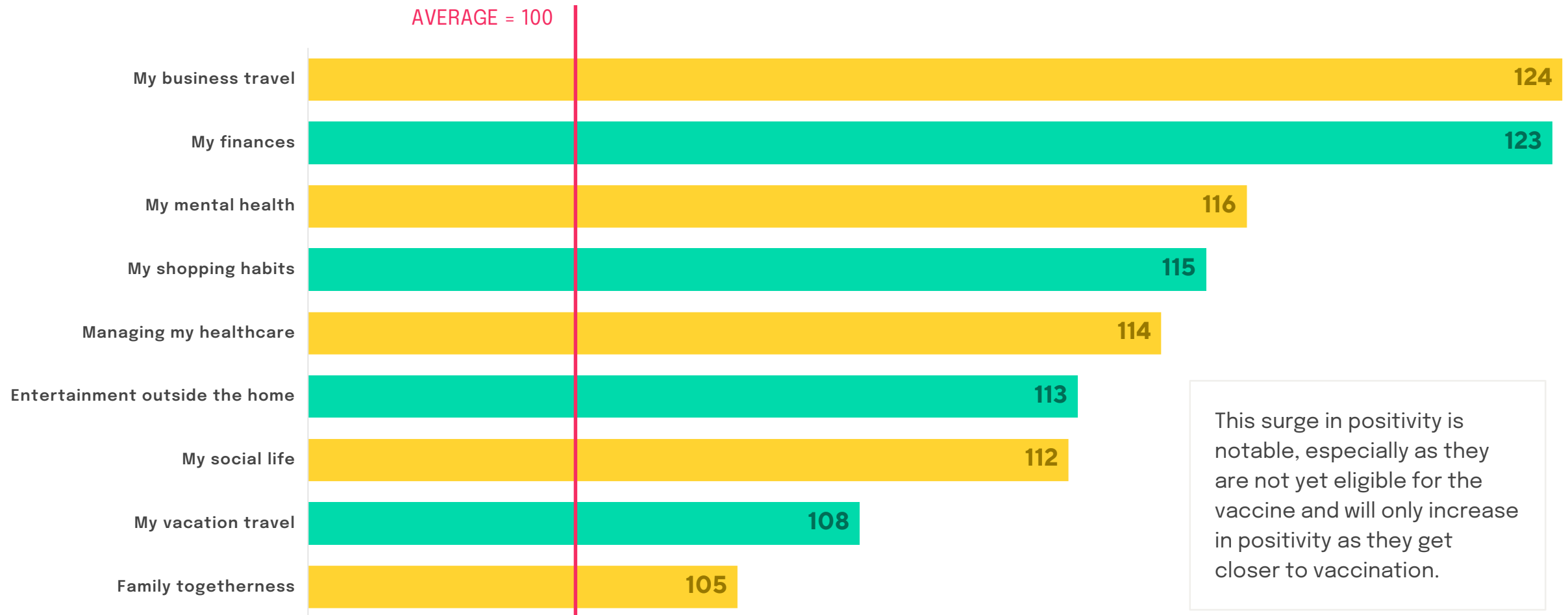
VS.

- More likely to talk about others
- 2.2x more likely to talk about sadness for what's been lost
- Talk about massive job loss, progress loss
- 2.4x more likely to talk about education
- 1.5x more likely to talk about loved ones
- 10 percentage points more uncertain



Biggest bounce-back is among Millennials.

Prior to the vaccine, Millennials were the most stressed and fearful of the generations.



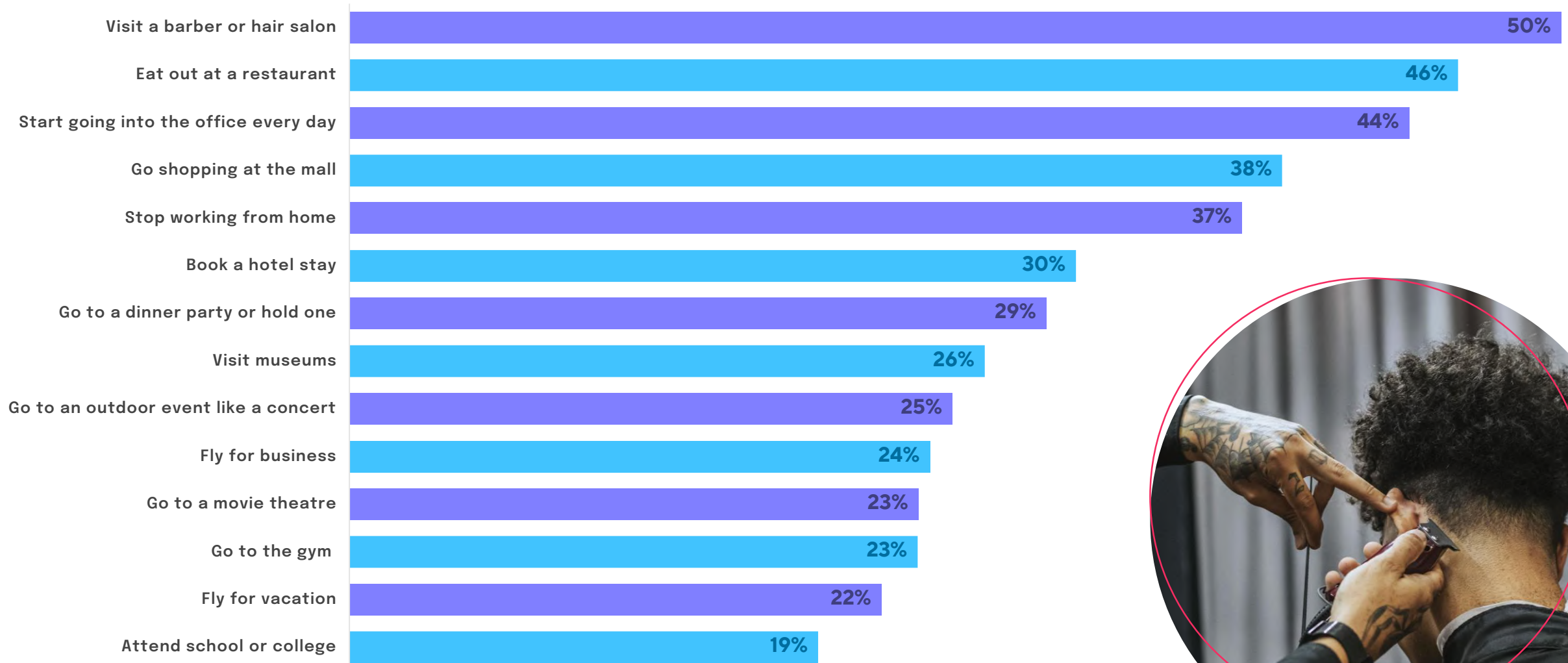


The anticipation is everything.

81%

believe the vaccine will have at least some impact on their vacation travel

Everyday activities are at the top of the post-vaccine list.



Turning 40 this year, Millennials will drive the new economy, and with it, behavioral trends.

- People over profit
- Progressive movements
- Humanized technology
- DTC innovation
- Evolution of entertainment





Hope is ushering in openness to change.

42% 17pts.

are much more likely to try new things now compared with a few months ago

higher than last time we measured

And relationships might be the first order of business post-vaccine.

76% are likely to start a new relationship

73% say they will end one





**Relationship shifts
include brands.**

35%

are much more mindful of
the brands they choose



**Mindfulness is driving
the next phase of the
Epiphany Economy.**

What will drive 2021 and beyond?

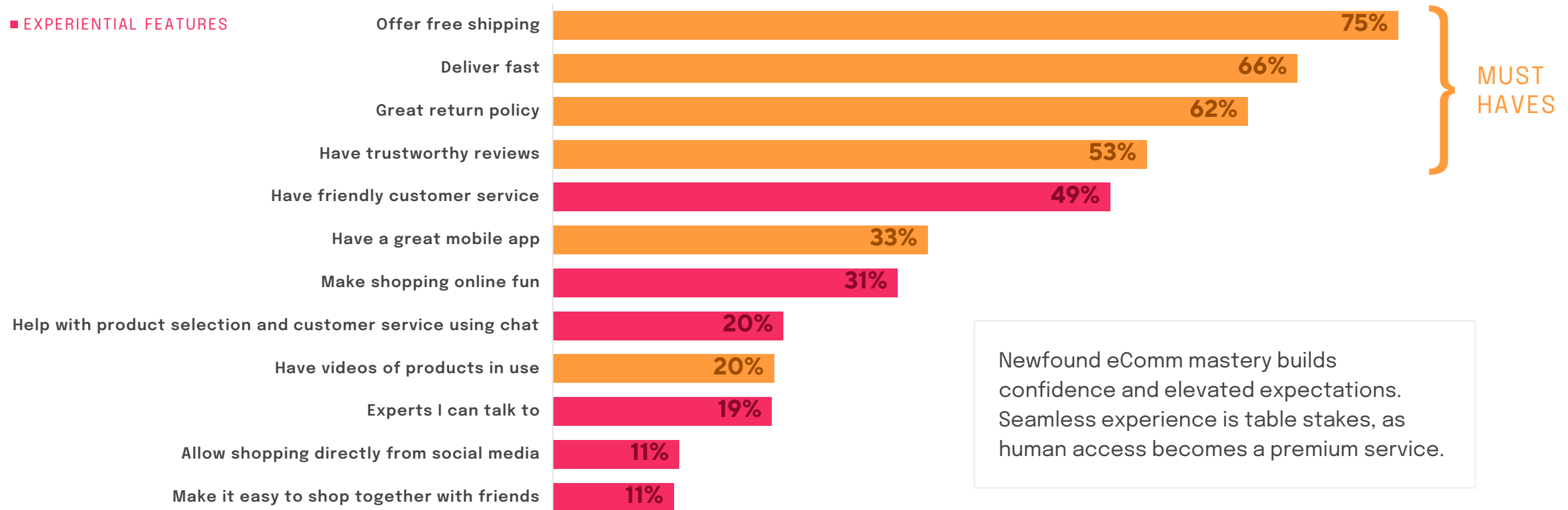
The Five Behavioral Epiphanies

Epiphany 1

eComm will be more experiential.

What do you expect from an online retailer now?

■ EXPERIENTIAL FEATURES



Epiphany · 2

Health protection is the new self-defense.

Health becomes an obsession. We know now what we have, and we'll protect it. These are not "diets" or "fitness challenges" but wholesale lifestyle change.

90%

say they are likely to exercise more post-vaccine, signifying an acknowledgement of the need to protect their health



Source: HHRI

Epiphany 3

Travel bounce-back will be slower but more meaningful.

Trepidation will keep people closer to home for mostly domestic travel, and it will be all about reconnecting with family.

In a few months
40%
will travel when most people are vaccinated

Never
23%
will not travel

Soon
22%
will travel when vaccinated

Now
14%
are already traveling

Epiphany 4

Real play will be as important as work.

Prepare for a massive entertainment bounce-back as people realize they write the rules for work and try to rebalance the burnout.

72%

say they will not have a regular 9-to-5 workday

85%

say vaccine will positively impact entertainment outside the home





Epiphany 5

Action will be the measure.

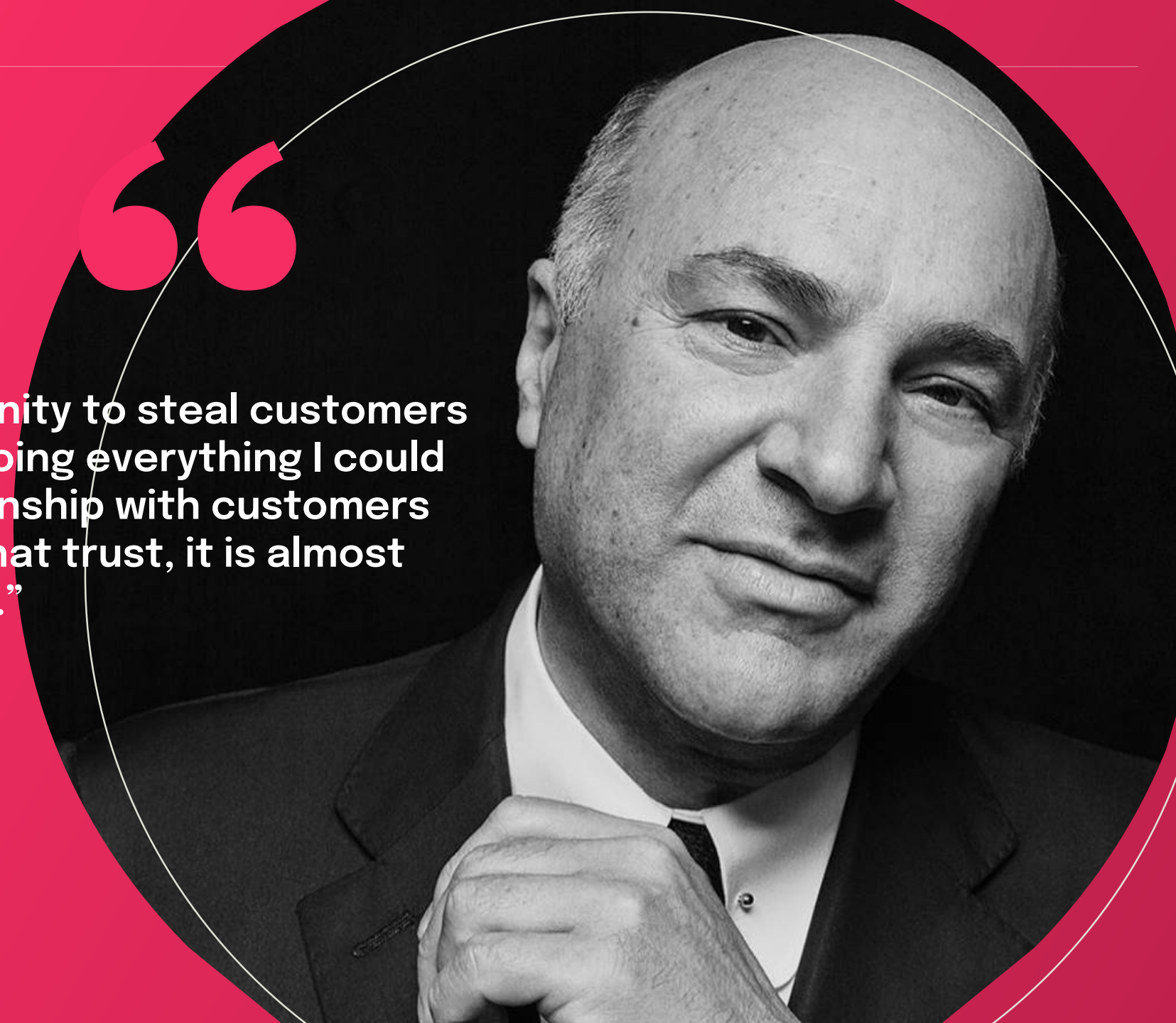
We expect brands to show they care through meaningful actions for today and the future. Brands that bravely leap toward progress will build trust and lead.



“

“ I would take this opportunity to steal customers from my competitors by doing everything I could to develop a direct relationship with customers because if you can build that trust, it is almost like a subscription service.”

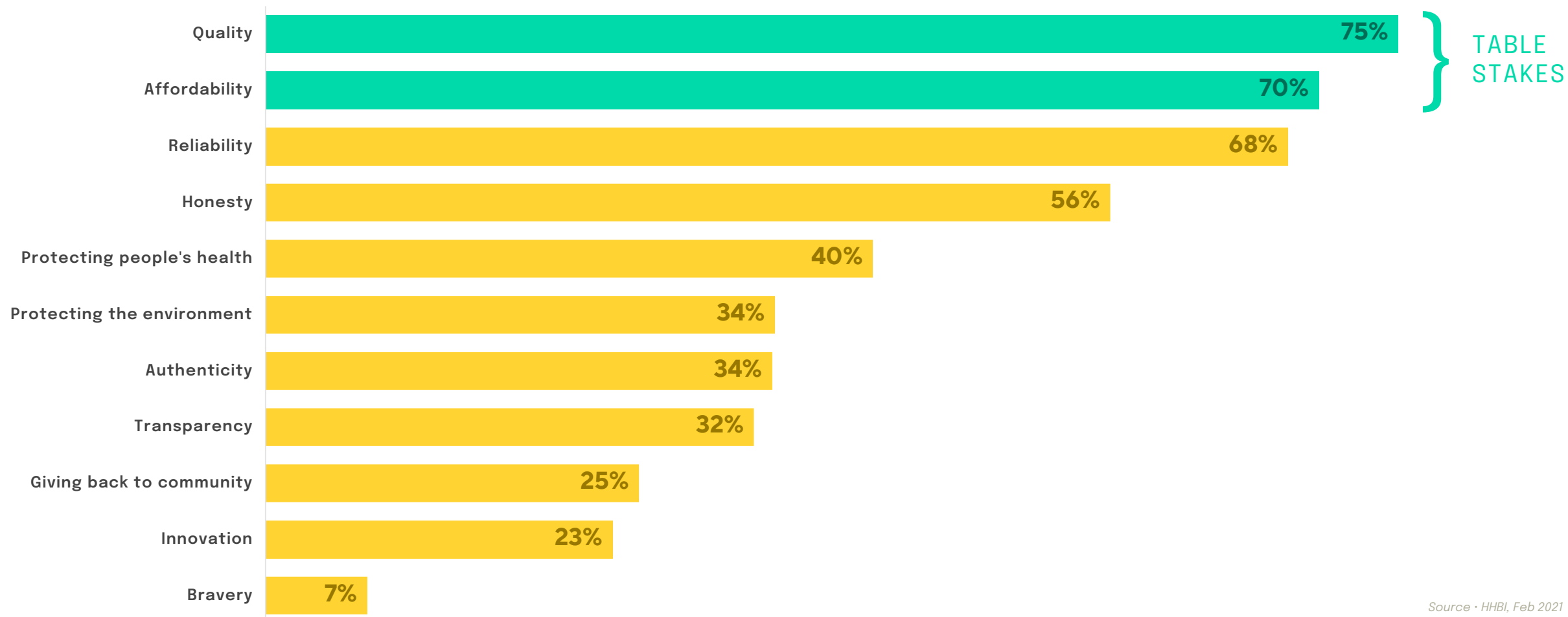
— **Kevin O’Leary**
Entrepreneur, *Shark Tank*





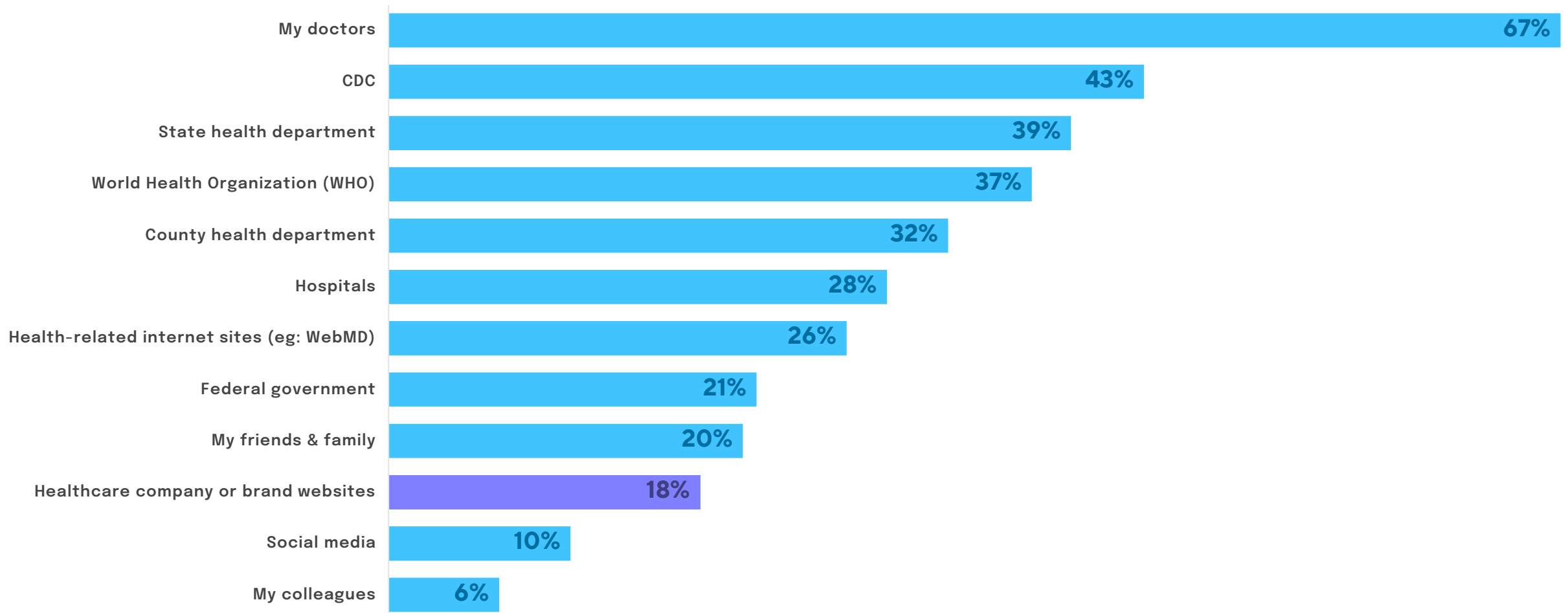
Motivating behavior today is all about trust and integrity.

“What makes you choose a new brand nowadays?”



Unfortunately, brands aren't faring well as trusted sources.

"Where will you go for vaccine information you can trust?"

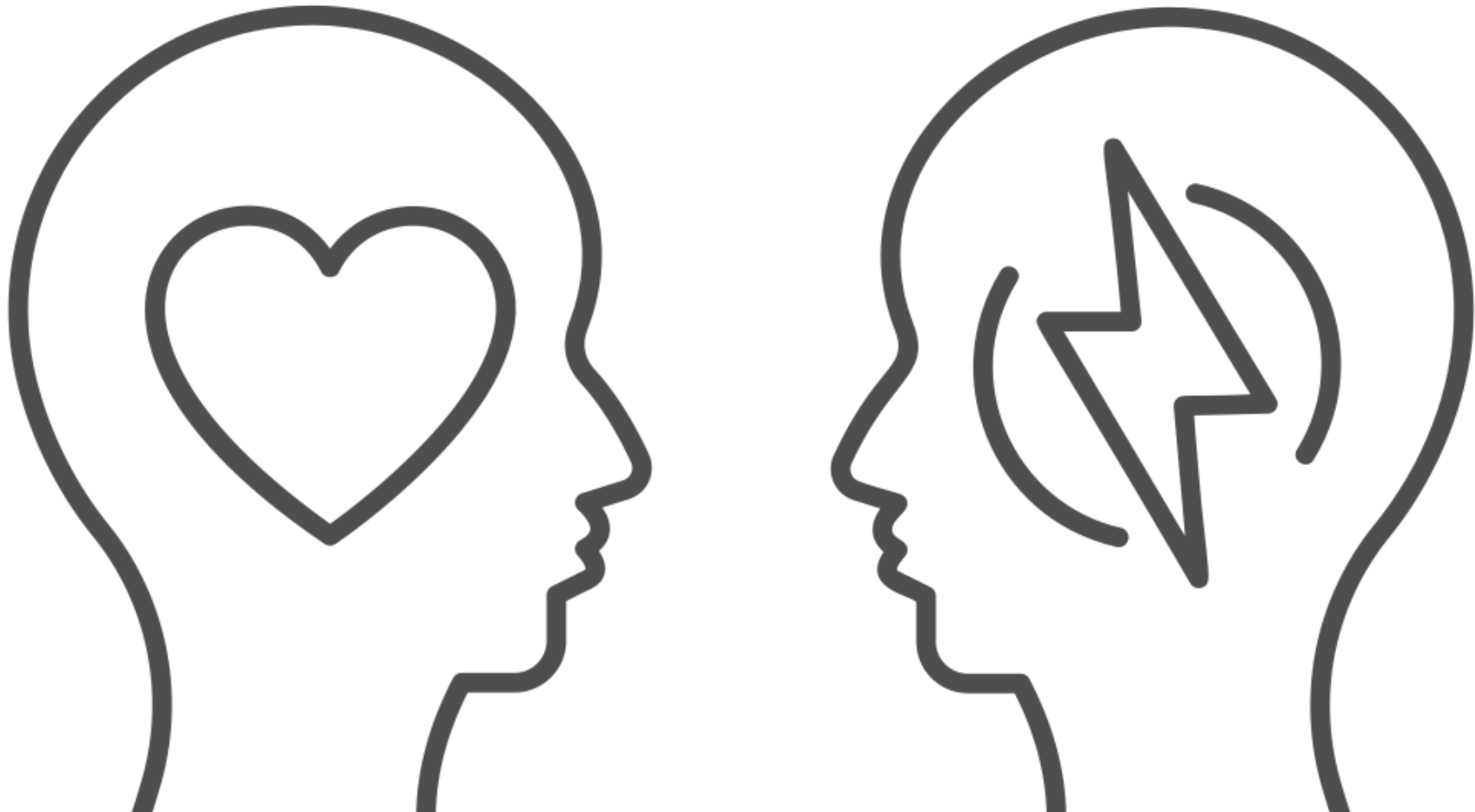


Without trust, information doesn't get to the right hands and, worse, it delays action.

People who are skeptical of the vaccine are **27x** more likely to use the phrase "I don't understand."



**Brands have to create trust
with both **empathy** and **action**.**



The most motivating brands: Analysis to define a brand's behavioral DNA.

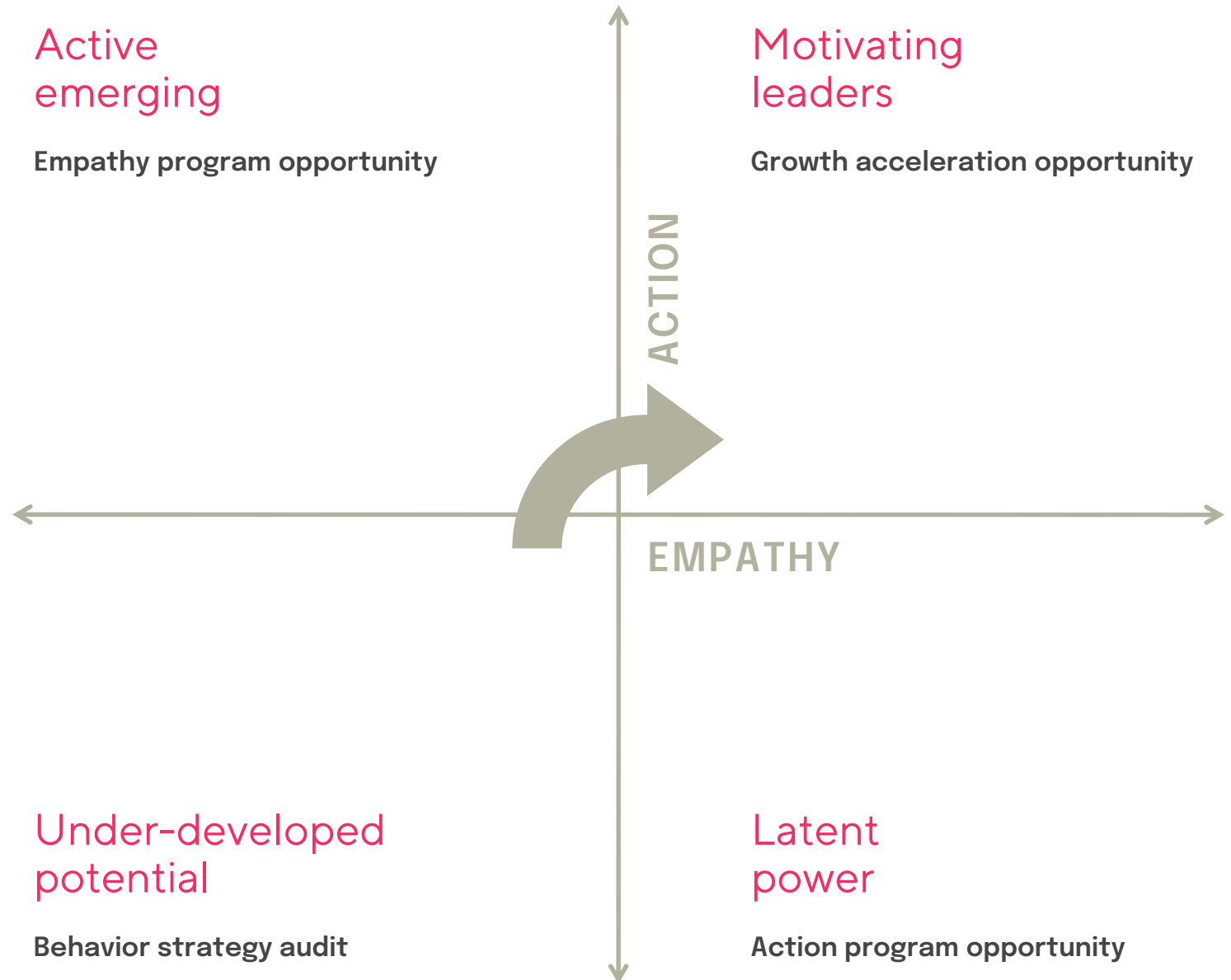
mo·ti·va·ting

ADJECTIVE

Able to influence someone to
behave in a particular way

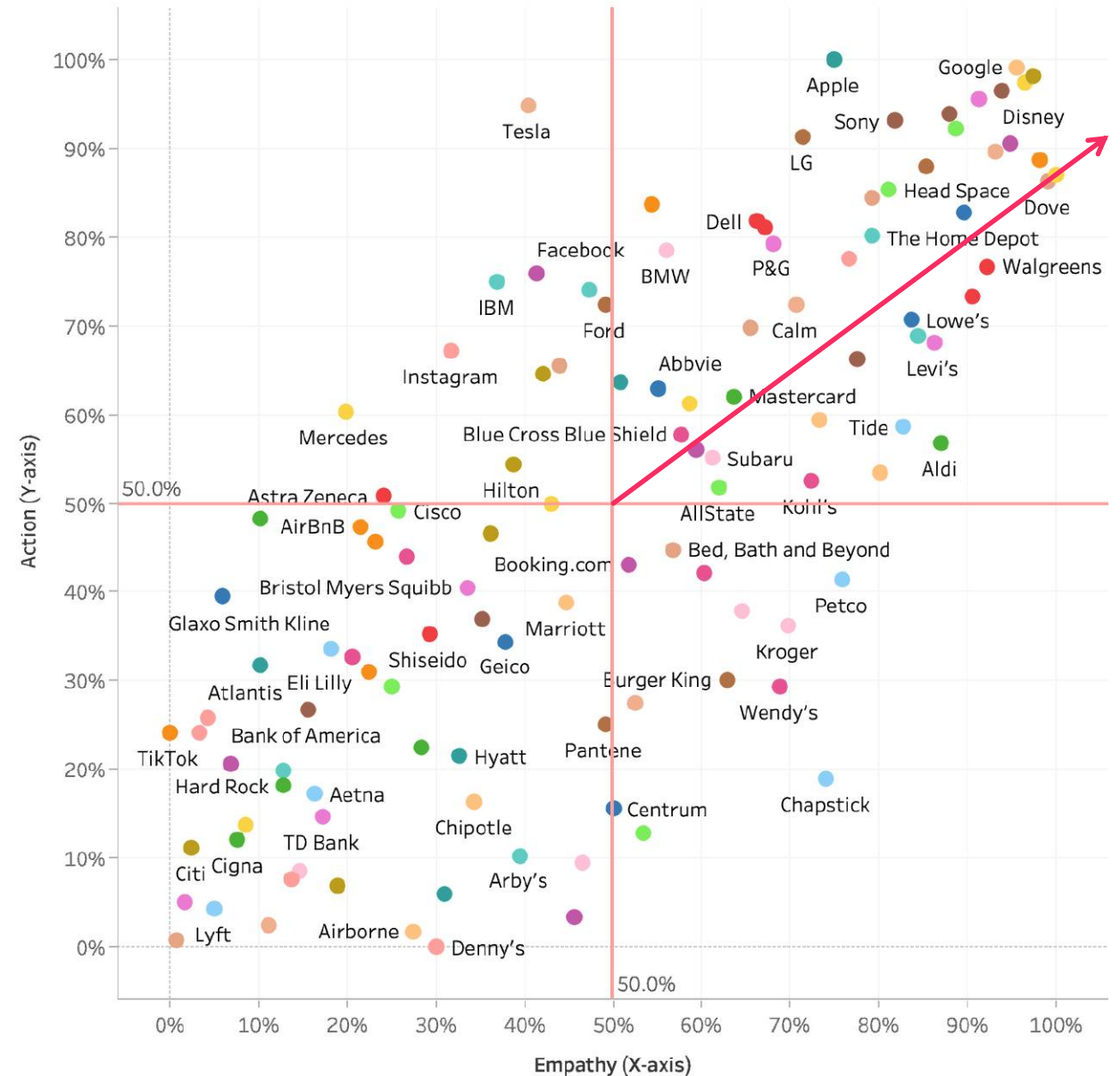


A behavior-driven brand development framework.



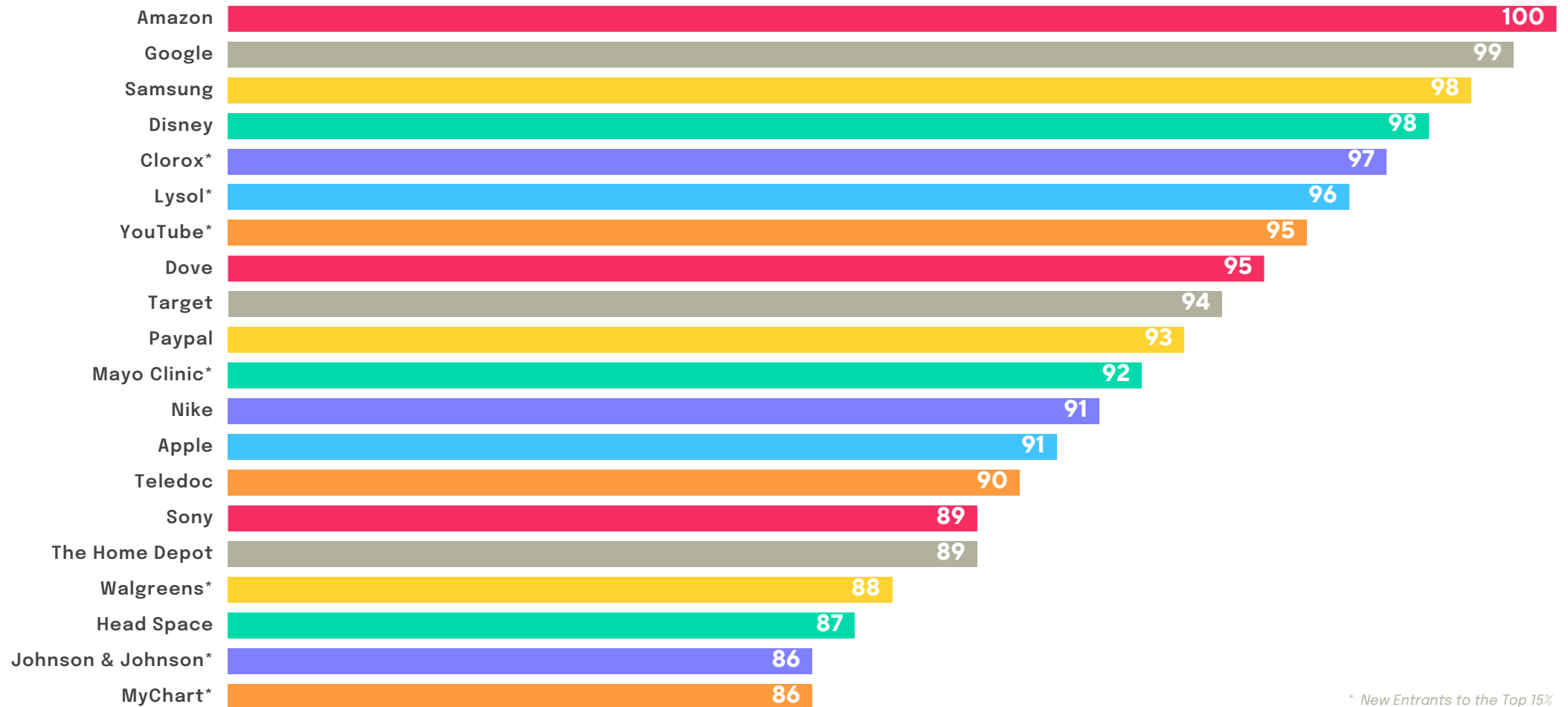


Top-performing brands in this framework are the most equipped to motivate new behavior.

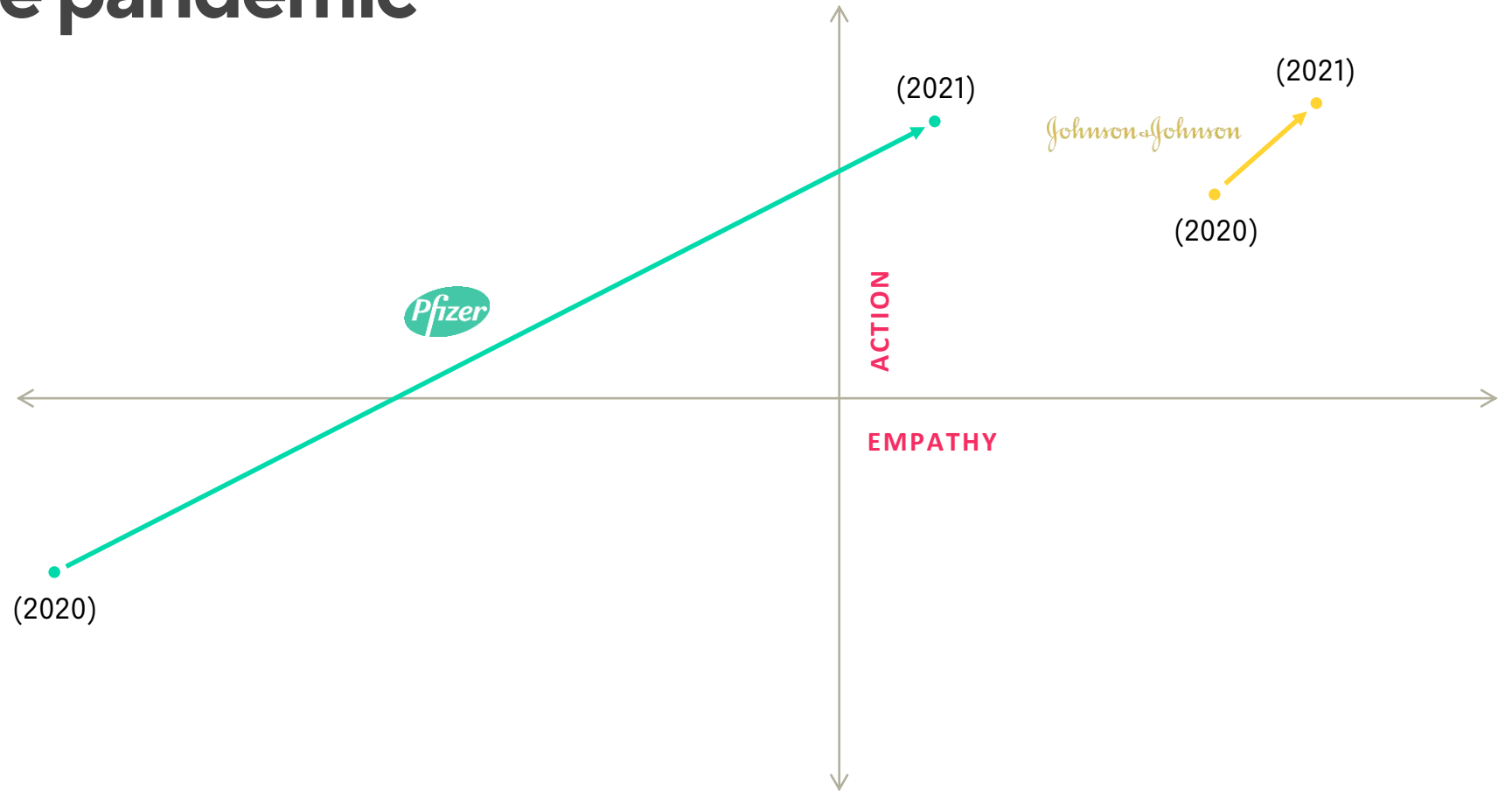
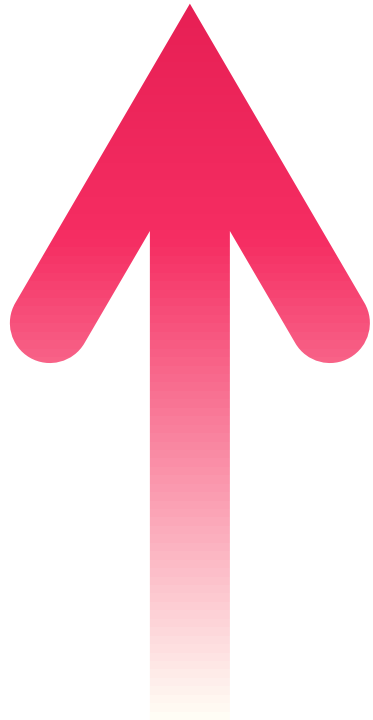


The most motivating brands.

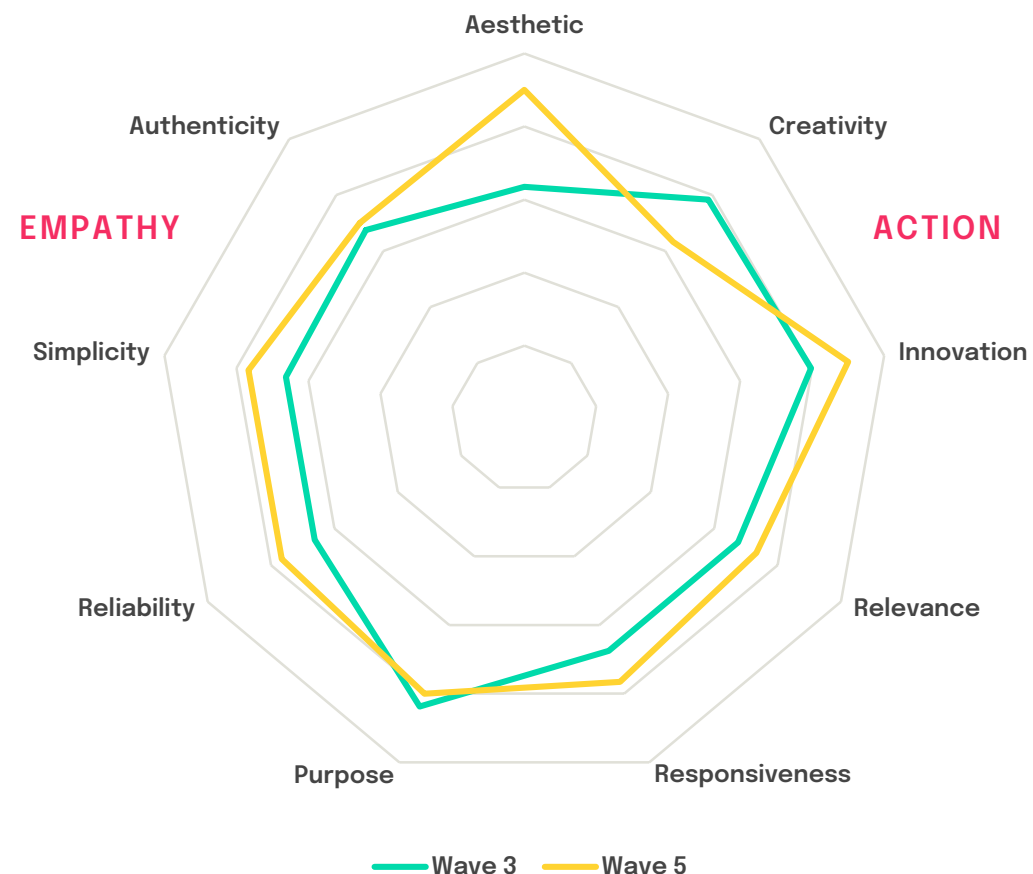
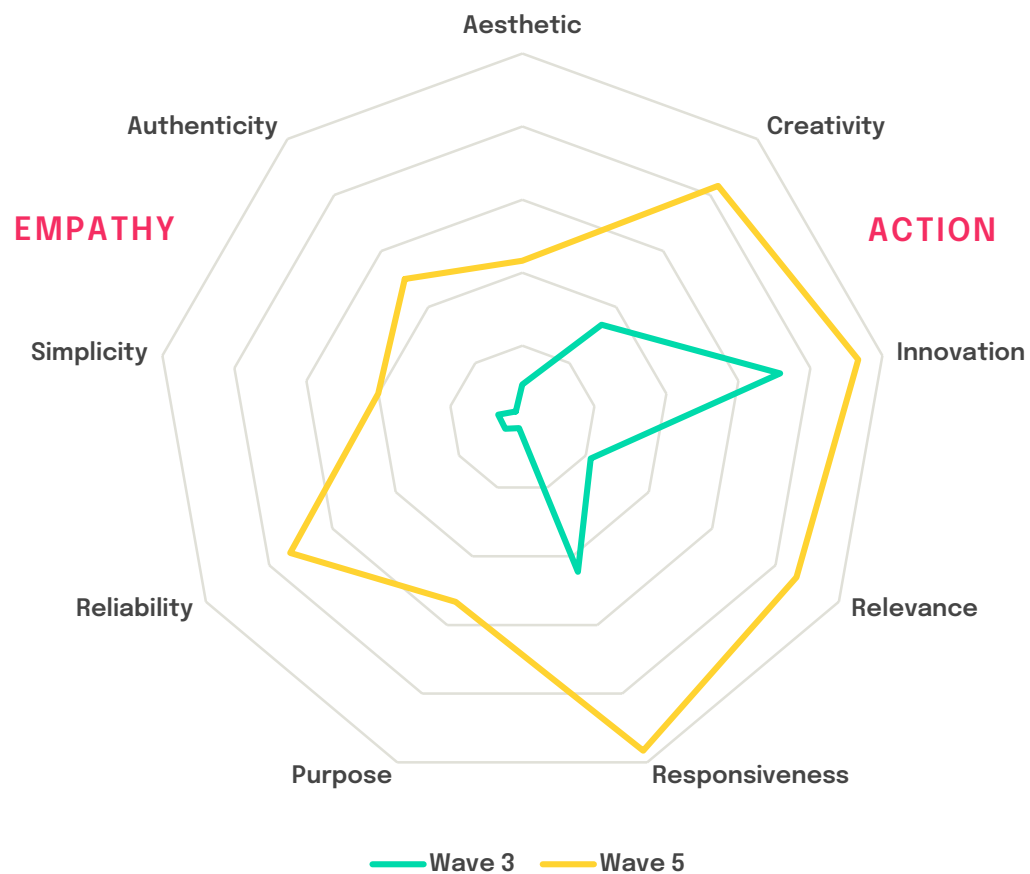
Top 15th percentile



The Vaccine Effect:
Brands with meaningful
actions during the pandemic
now rank higher.



The results of empathy and action are dramatic.





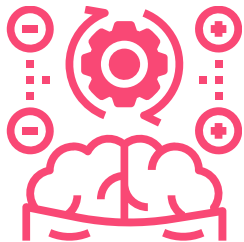
There's only one question:
**What is your role in the
bounce-back?**

The Vaccine Effect: Not business as usual.

Three essential actions to meet the new needs of the bounce-back:

1

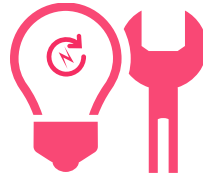
Audit your motivation



It's imperative to understand how customers think about you now. Who they were pre-pandemic is not who they've become. Deeply audit the experience you are delivering to measure whether it's meeting new expectations.

2

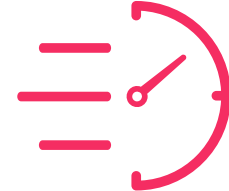
Retool



People need planning tools and utility. Identify the gaps between what the customer expects now and the experience you are delivering. This may require an acceleration of ideation and innovation around digital utility or eCommerce solutions.

3

Speed to execute



This needs to be fast. Get your ideas to market as quickly as your customers ask for them. It's ok to be imperfect. The goal is to build trust by getting to market, solving problems and iterating.



[hartehanks.com](https://www.hartehanks.com)