

THE HARTE HANKS BEHAVIORAL INDEX

PANDEMIC PAUSE VS. THE
GREAT RETURN

May 2020

HARTE
HANKS

CONTENTS

WHERE WE ARE ⁽⁵⁾

HOW WE FEEL ⁽¹³⁾

THE NEW ECONOMY ⁽²²⁾

BEHAVIORAL SHIFTS ⁽²⁹⁾

WHAT BRANDS NEED TO DO ⁽⁵⁸⁾

HARTE
HANKS
BEHAVIORAL
INDEX

A GLOBAL INITIATIVE
TO UNCOVER DRIVERS OF
EMERGING BEHAVIOR

METHODOLOGY

Analysis of mass, global data and language assets

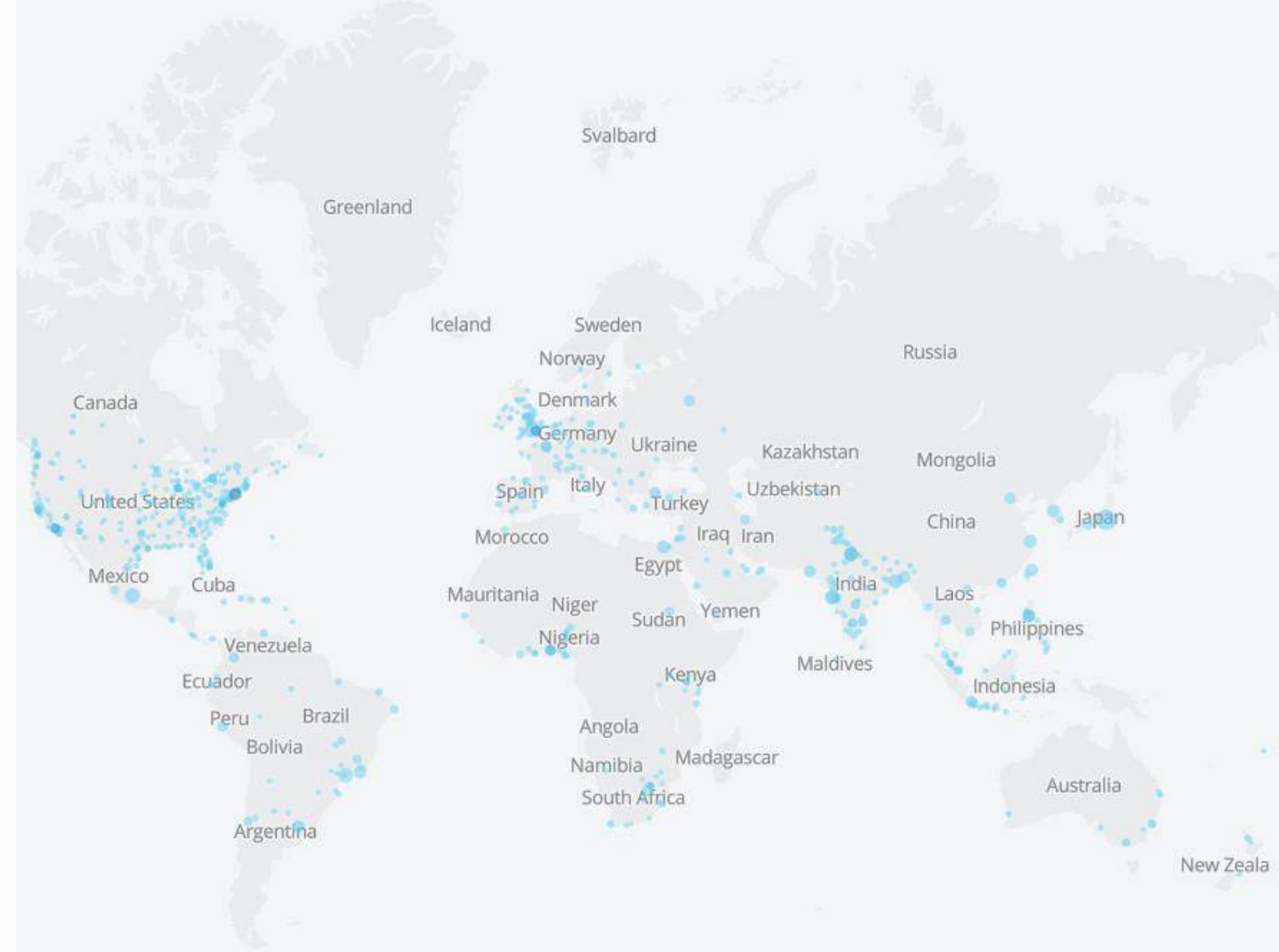
Month-over-month comparison
April vs. May

450M global conversations

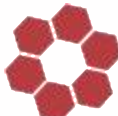
2,200 people surveyed (U.S.)

20,000 global stories

2M semantic artifacts



Quid

 crimson hexagon

 **Relative**
INSIGHT

Russell RESEARCH

WHERE WE
ARE

FACT

We will be here for a while.

The New York Times

“We must be prepared for another 18 to 24 months of significant Covid-19 activity, with hot spots popping up periodically in diverse geographic areas.”

May 9, 2020



World Health Organization

“The new coronavirus may never go away and populations around the world will have to learn how to live with it.”

May 13, 2020



60%

believe “normal” is more than
two months away.

“

I feel like an accidental monk.”

– ALEX EBERT

EVERY DECISION IS A MORAL DECISION

THERE'S EVIDENCE WE'RE HEADING TOWARD COMPASSION FATIGUE

BATTLE BETWEEN WHAT WE SHOULD DO AND WHAT WE WANT TO DO

60%

Increase in use of words of
LAW & ORDER

vs.

120%

Increase in use of words of FREEDOM

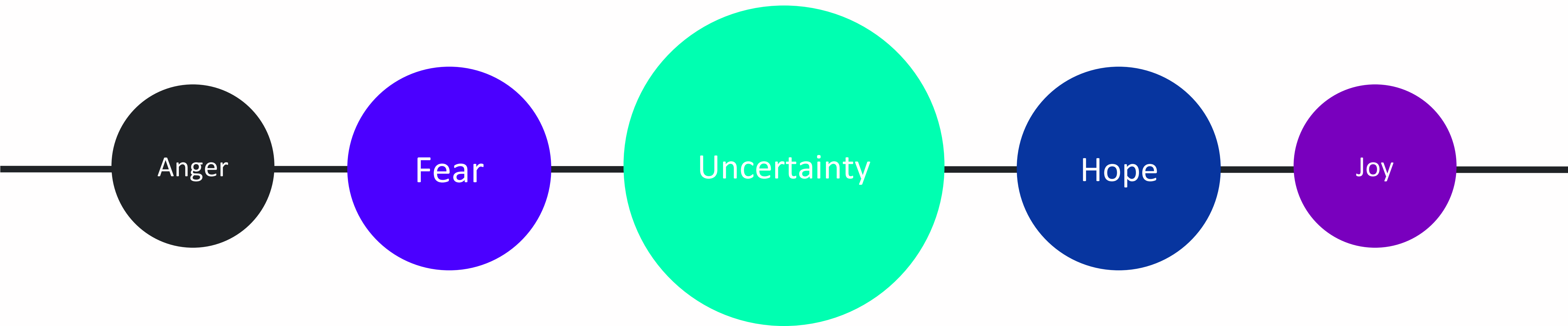
BEING GOOD TAKES A LOT OF
MORAL MUSCLE.

AND WE'RE REBELLING.

HOW WE FEEL

THE EMOTIONAL SPECTRUM

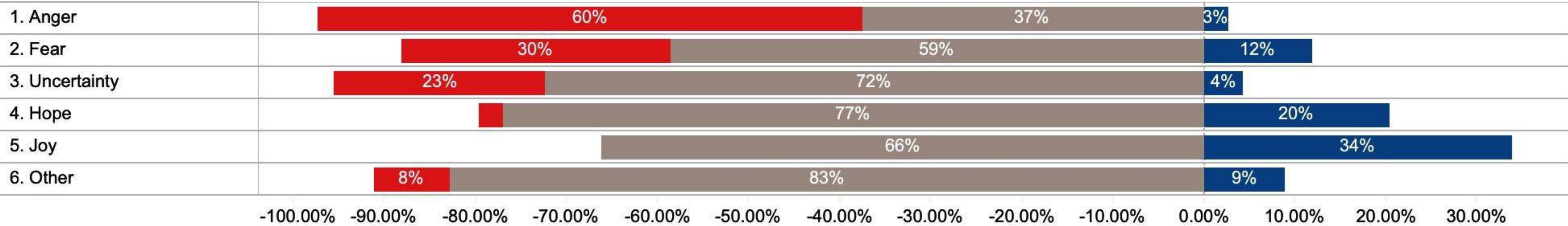
5 core emotions driving behavior today



EMOTION INTENSIFIED SINCE LAST MONTH

The angry got angrier, the joyful got more joyful.

CHANGE IN FEELINGS

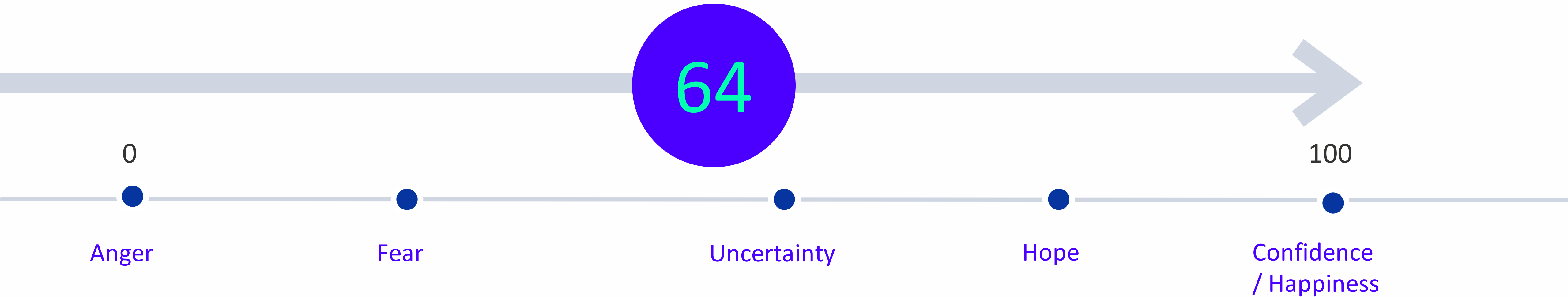


Note: Percentages are percentage of responders

- Positive
- Negative
- About the same

GOOD NEWS:

There is more hope, optimism and joy.

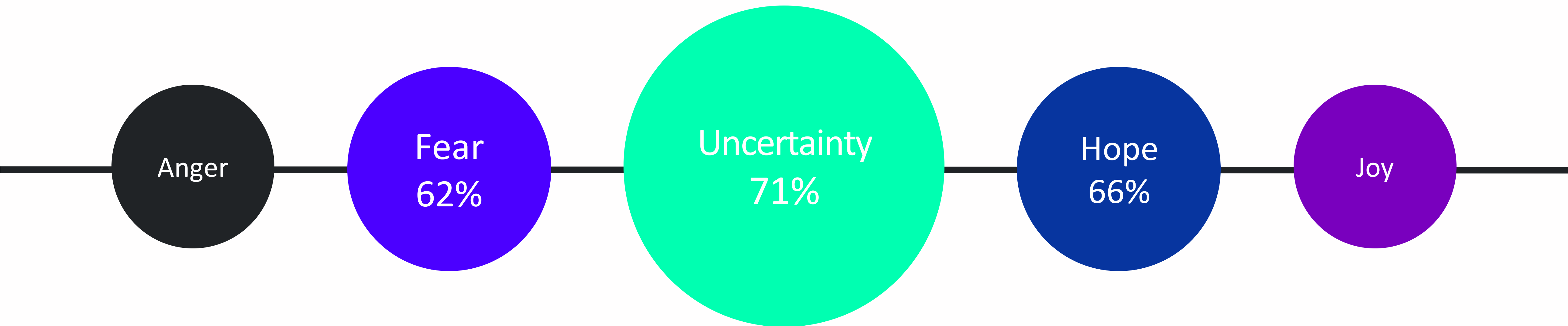


+3 POINTS FROM LAST MONTH

Current state: Fear / Uncertainty

BAD NEWS:

We swing between hope and fear.



MONTH OVER MONTH OUR DEEPENING, CONFLICTED EMOTION IS SHOWING

7% 

Increase in
sadness

- Opening
- Testing
- School
- Football

17% 

Increase in fear
among Gen-Z

- Isolation
- Money
- Need for normal

3% 

Increase in anger among
Midwest US

- Opening
- Economy
- Government

13% 

Increase in joy globally

- Celebrations
- Holidays
- Donation
- Stimulus checks

UNCERTAINTY DRIVES OUR BEHAVIOR

71%

(down 7% from last month)

THE FEELING OF UNCERTAINTY AND CONSTANT
FLIP-FLOP OF EMOTION FORCE A RE-
EVALUATION OF PRIORITIES...

...AND TURN US INWARD.

THE NEW ECONOMY



↓43%

Social conversations have fallen dramatically, while sentiment remains steady at 73% negative.

“

When you press the pause button on a computer, it stops. But when you press the pause button on a human being, they start — that’s when they begin to rethink and reimagine.”

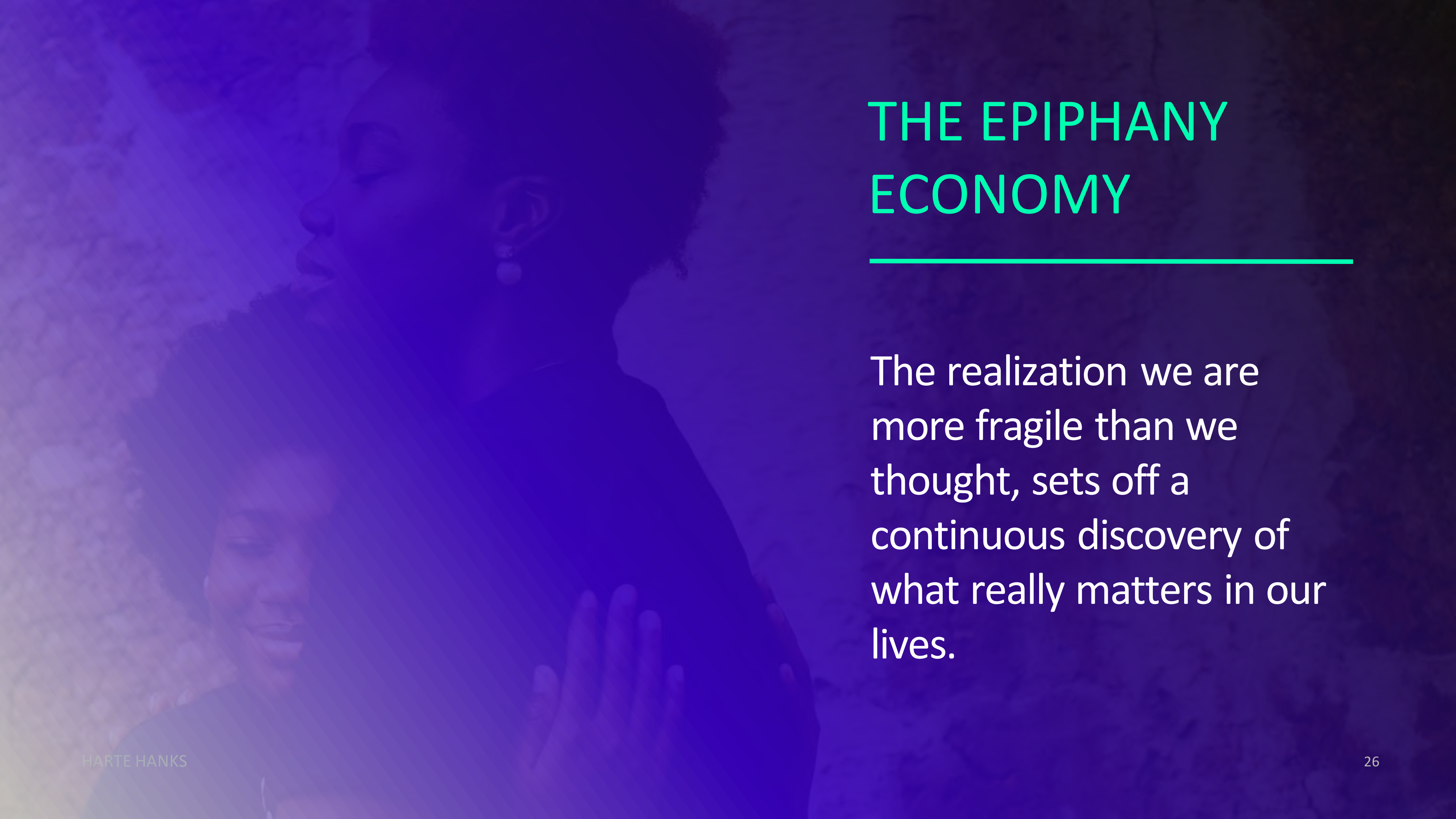
— DOV SEIDMAN

Founder, Chairman, LRN,
Author of *HOW: Why HOW We Do Anything Means Everything*

The New York Times - April 21, 2020

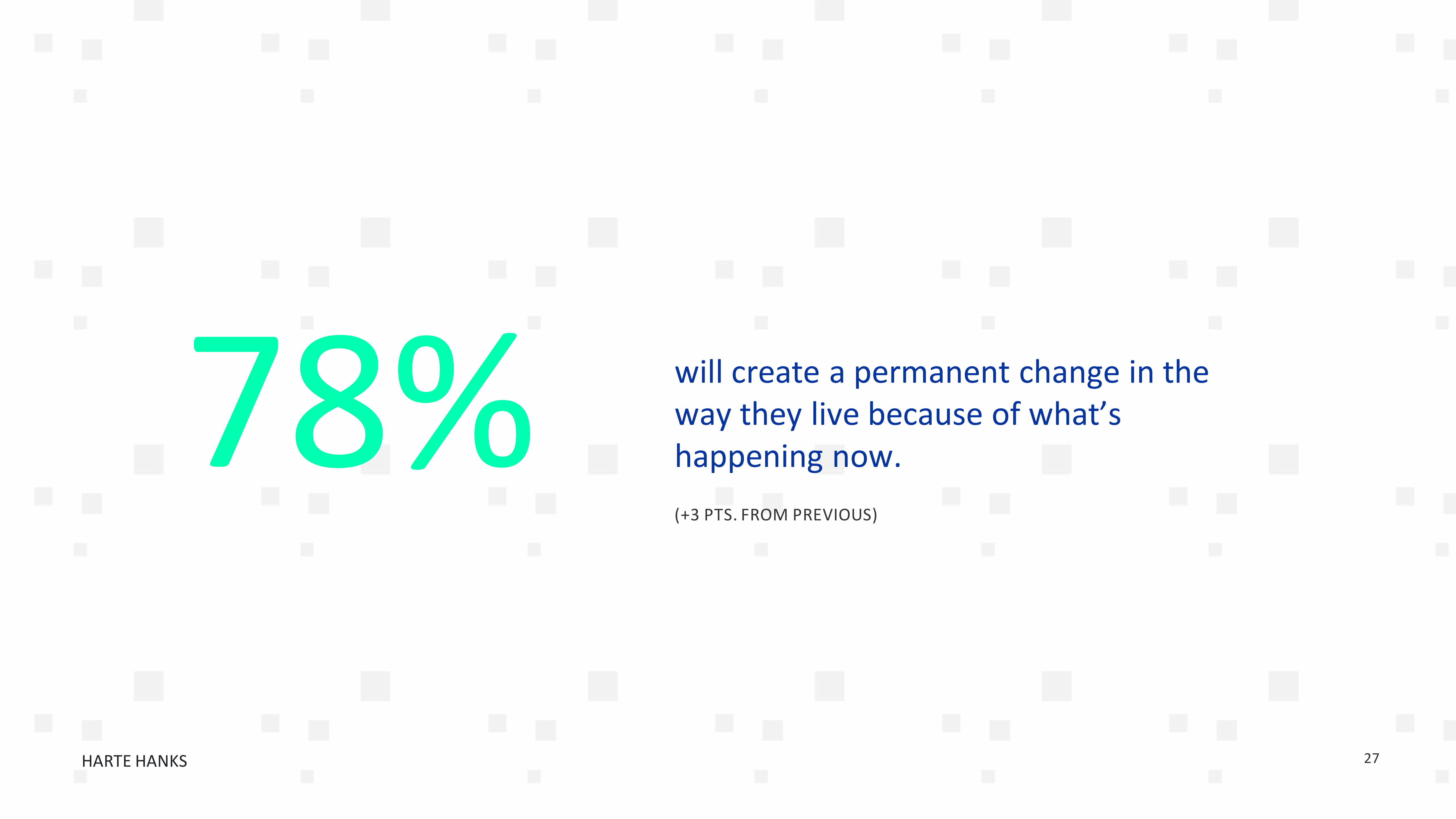


WELCOME TO THE EPIPHANY ECONOMY

A woman with dark skin and curly hair is shown in profile, her hand pressed against her forehead in a gesture of contemplation or realization. In the background, another person's hand is visible, resting on her shoulder, suggesting support or a shared moment. The entire scene is overlaid with a semi-transparent blue filter.

THE EPIPHANY ECONOMY

The realization we are more fragile than we thought, sets off a continuous discovery of what really matters in our lives.



78%

will create a permanent change in the way they live because of what's happening now.

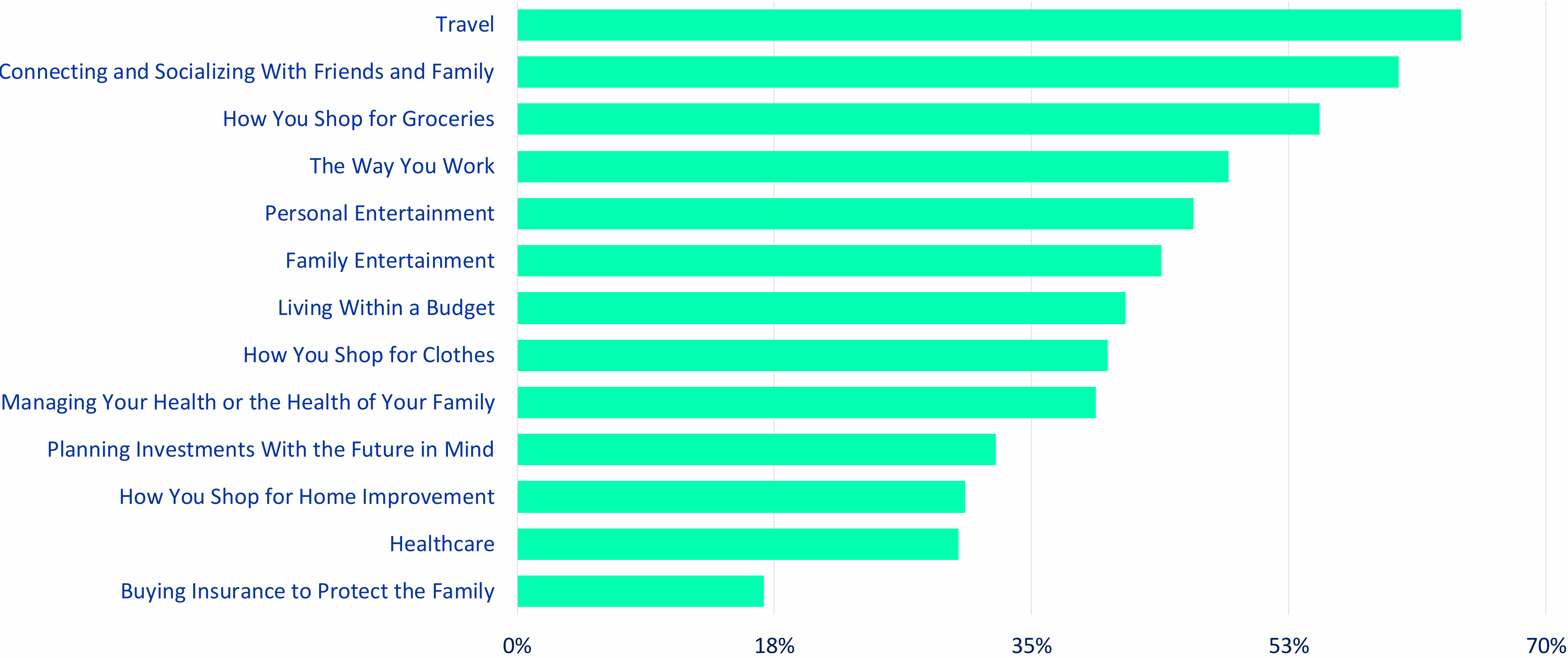
(+3 PTS. FROM PREVIOUS)

WE ARE
REEVALUATING ALL
STRUCTURES IN LIFE

Relationships · Institutions · Government · Community · Work · and, yes, Brands

BEHAVIORAL SHIFTS

% REPORTING GREAT DEAL OF CHANGE



COPING WITH THIS CHANGE PROVOKES PERSONAL EPIPHANIES

RETHINKING & REIMAGINING OUR BEHAVIOR

MONEY

“I can’t keep going without an eye to the future”

SOCIETY

“We need each other”

CONSUMERISM

“What I choose to buy matters”

HEALTH

“I have to take better care of myself”

WORK

“There are better ways of working”

ENTERTAINMENT

“We need more play in our lives”

SCIENCE

“We’re not as advanced as we thought”

1

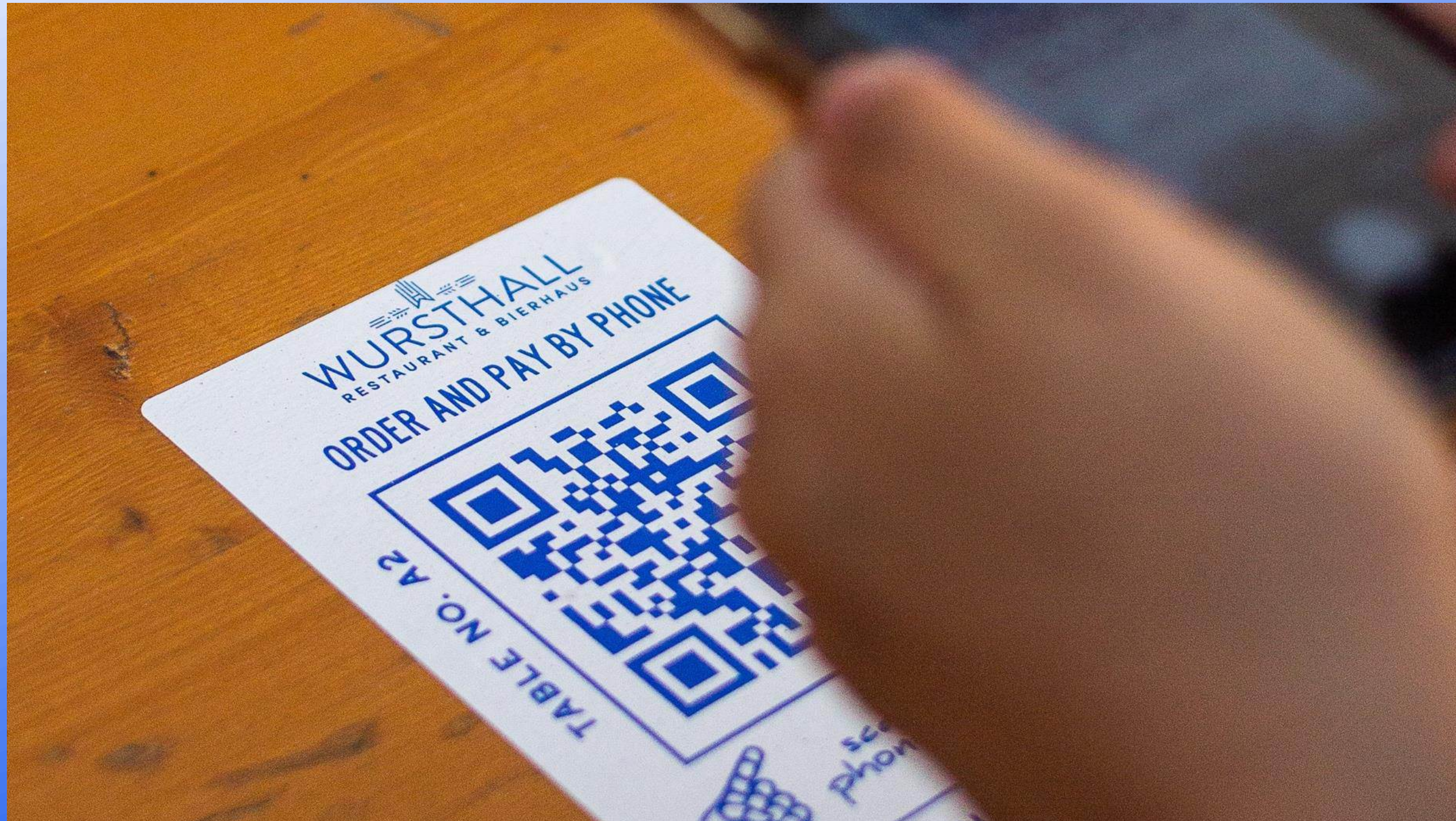
SOCIETY

“We need each other”



“

I bond with my family now more than ever, and this is one of the most important and positive changes I've made in the way I live my life.”



LONGING FOR THE HUMAN BOND, WE'RE INNOVATING WAYS TO RECONNECT

Quarantine greenhouses for
dining

A birthday cake with lit candles sits on a table, with a blue overlay covering the entire image. The background shows a birthday cake with lit candles on a table.

60%

increase in language of shared moments
and celebration: birthdays, sunsets, dates
...

FUTURE BEHAVIOR IMPLICATION

Moment-based living

- Attention to the present
- More group celebrations for adult birthdays and anniversaries
- More leisure time
- Increased spend on gifts and “simple luxuries”

Morphing retail experiences

- Togetherness with social distancing
- Pod-like structures
- Bio-protective interactions

FUTURE BEHAVIOR IMPLICATION

Rise of the new collectives

- Community self-reliance (rise in co-ops, neighborhood public health, micro-local systems)
- Positive shift in internet tone, rise in groups
- Politicians that speak of unity and community solutions

2

ENTERTAINMENT

“We need more play in our lives”

“

We've stopped going out, we've stopped going to places of entertainment, we no longer go out unless necessary, I have canceled trips and work from home.”

ENTERTAINMENT NOW HAS A HEAVY LOAD TO
BEAR, SERVING AS OUR DE FACTO THERAPIST
AND CHIEF DISTRACTION OFFICER.

STREAMING BEHAVIORS TURN FROM SERIOUS TO SILLY

62% want funny

51% wholesome and feel good

41% lighthearted

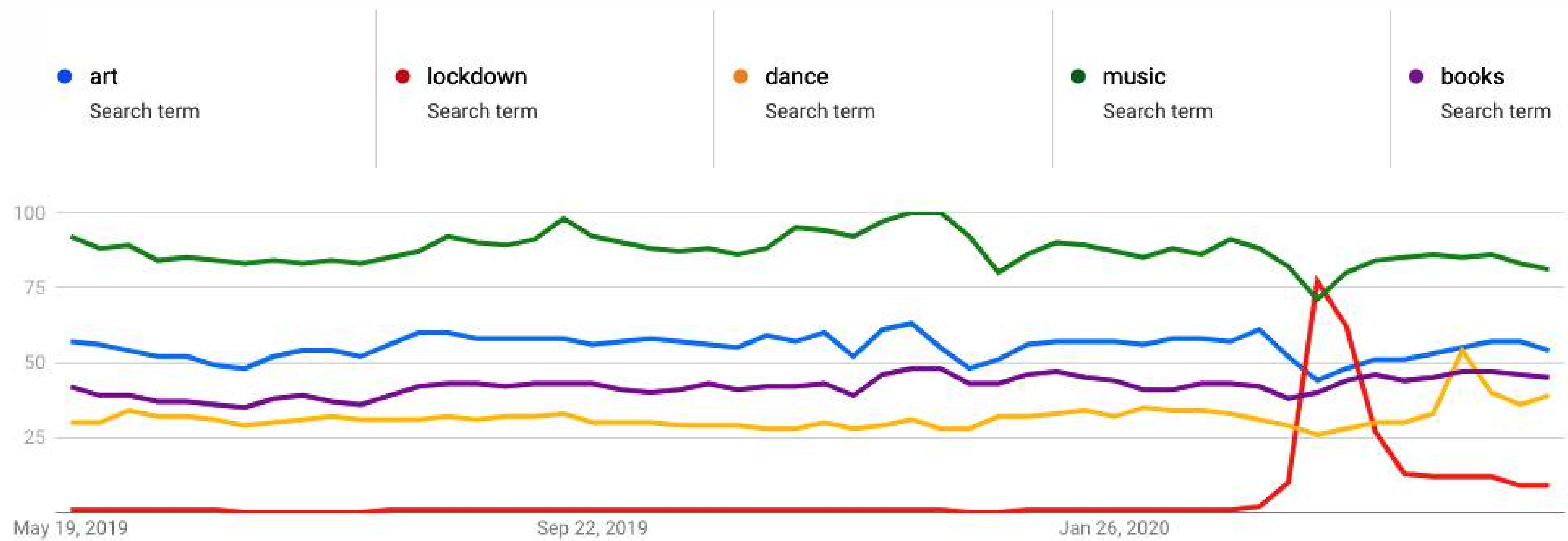
35% “literally anything that distracts me”

NETFLIX

TOP SHOWS THIS MONTH



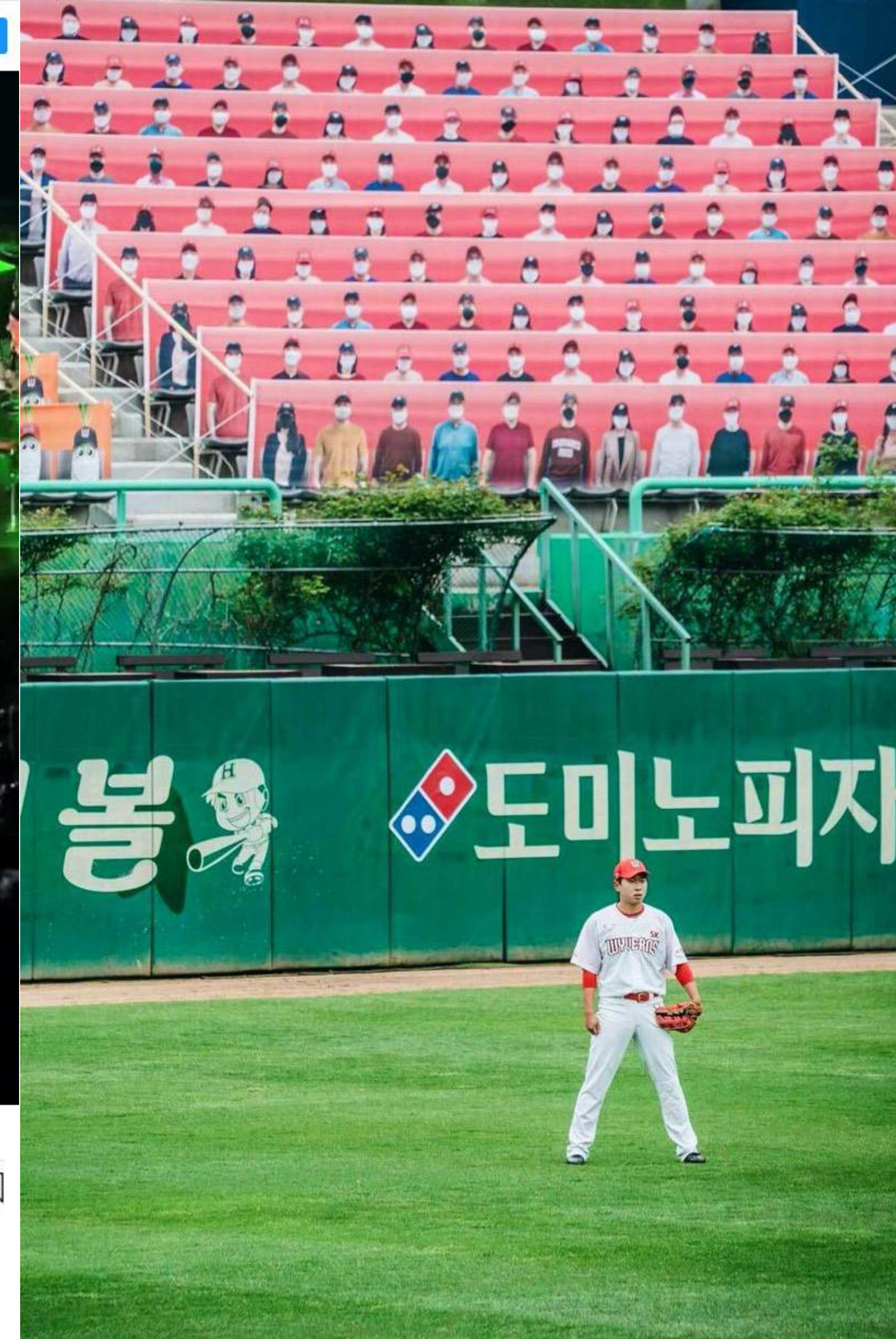
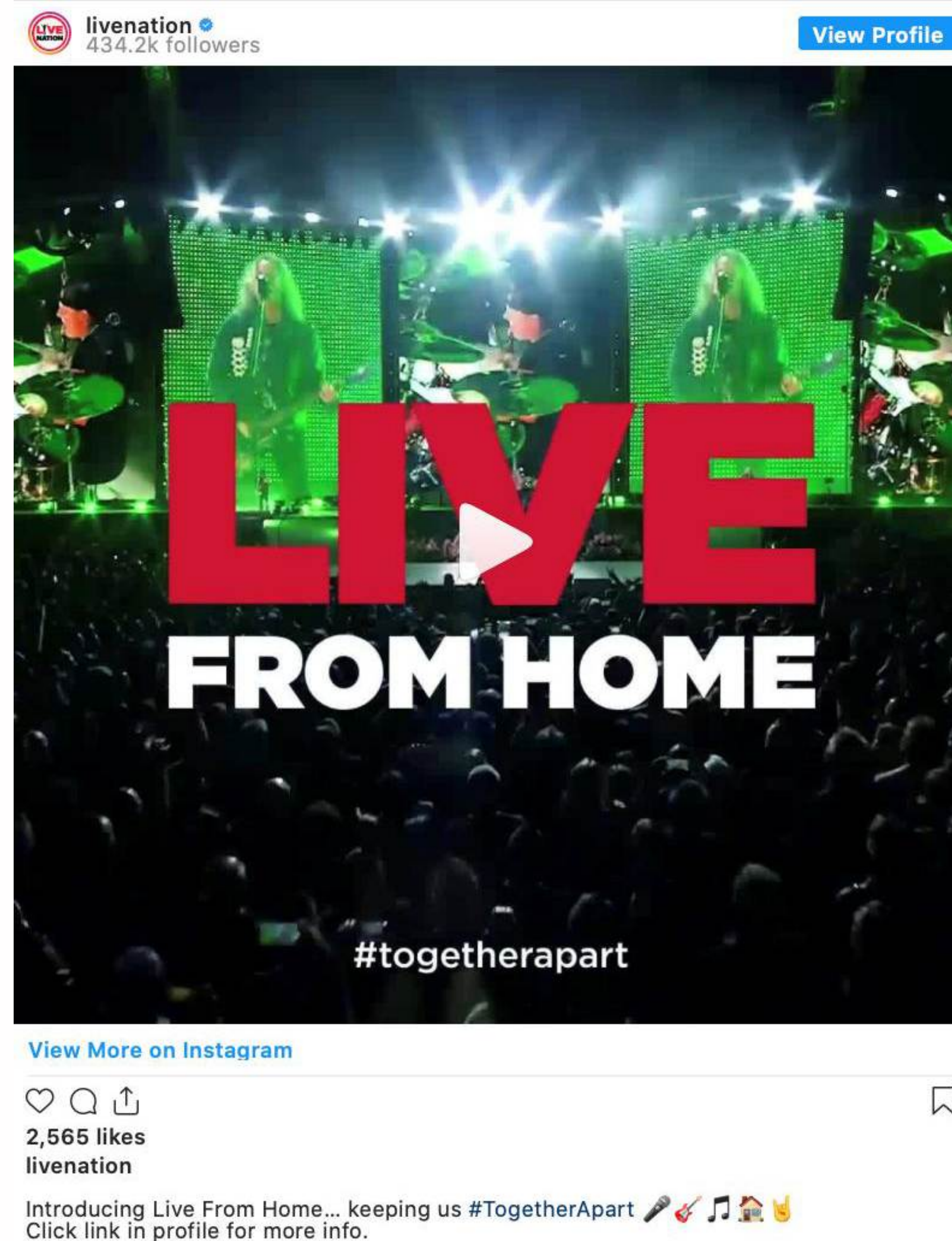
IN LOCKDOWN, CULTURE BOUNCES BACK

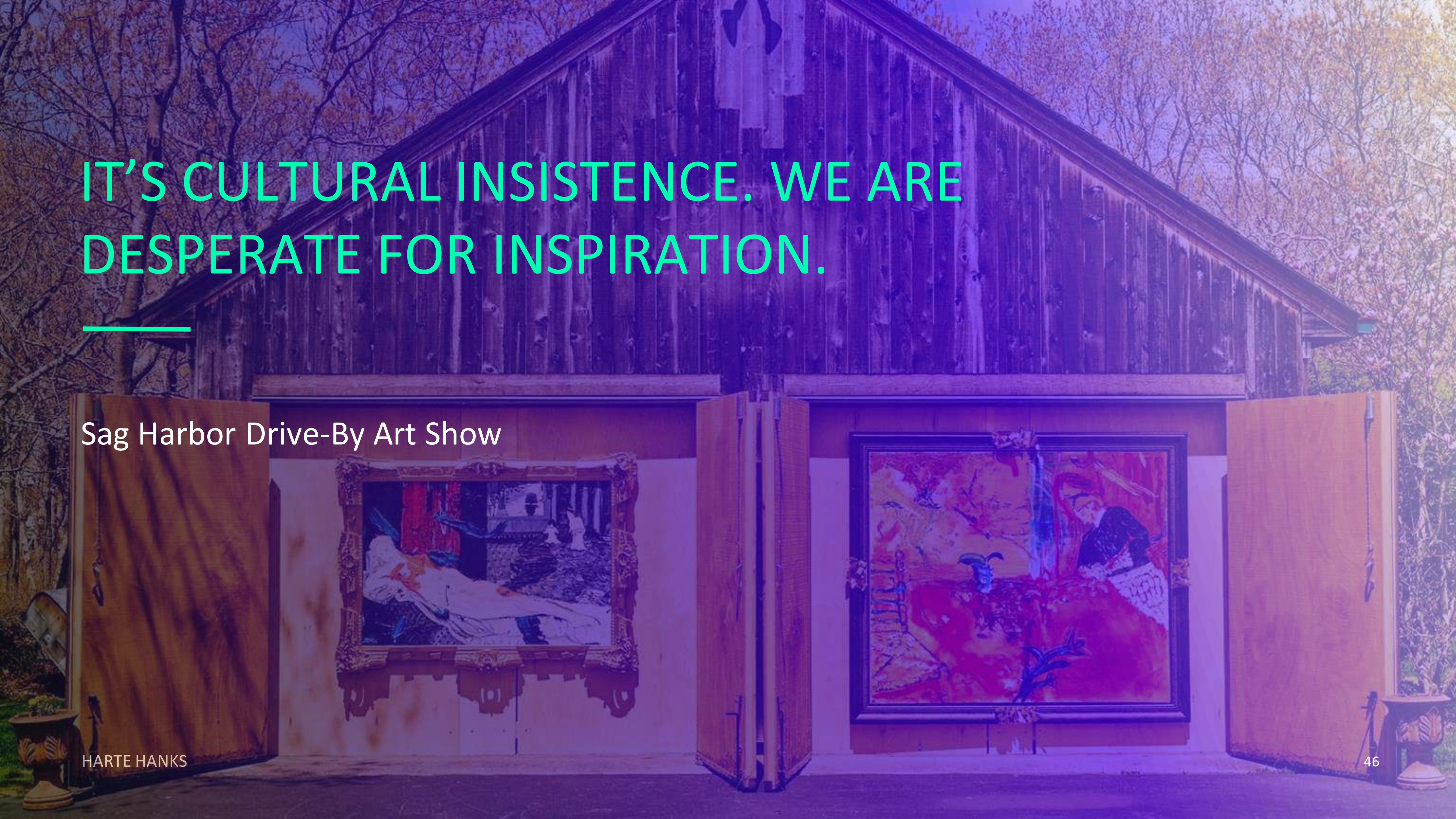


Alternative digital spaces are providing much-needed inspiration, a shelter from isolation.



Traditional
entertainment is
morphing into new
formats.





IT'S CULTURAL INSISTENCE. WE ARE DESPERATE FOR INSPIRATION.

Sag Harbor Drive-By Art Show

FUTURE BEHAVIOR IMPLICATION

Greater demand for richer
at-home experiences

- More immersive cultural experiences on demand
- Mobile-first creative experiences
- Home theater investment
- Democratization of culture – cultural influencers in-home

3

WORK

“There are better ways of working”

63%

say there's been change in
their work in the last month.

ONLY

23%

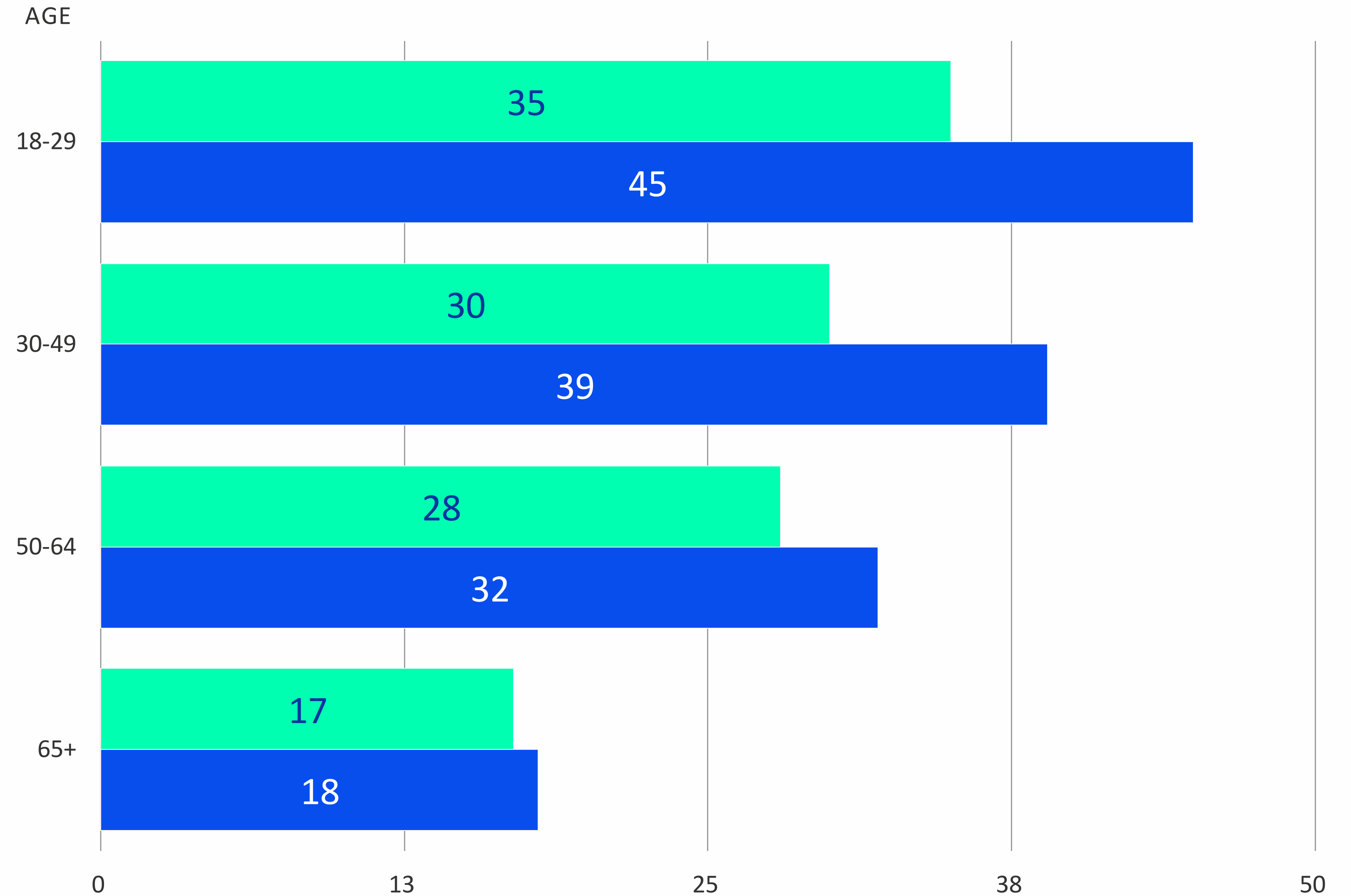
say that change is positive.

30 MILLION

have claimed unemployment in the past
six weeks in the U.S.

Youth are the
hardest hit, yet
suffer silently.

■ Been laid off / lost job
■ Had to take a cut in pay



“

You’re going to have to grow up faster than other generations ... turns out adults don’t have all the answers.”

— PRESIDENT BARACK OBAMA

2020 Graduate Together Virtual Graduation

May 16, 2020

FUTURE BEHAVIOR IMPLICATION

Emergence of the lost ones

- Young millennials suddenly out of work
- Graduating seniors unable to get employed
- Greater respect for planning and real mentorship
- Self-reliant and experimental



“

I feel fortunate to have a job, but really am having trouble managing it day-in and day-out.”

80%

of those with children say they've made a great deal of change in the way they work over the past month.

The Seattle Times

“All-day happy hour? Americans drinking while working at home in pandemic, surveys say.”

APRIL 21, 2020

42%

reported drinking on-the-clock
(Fishbowl Survey)

WORKERS ARE PART OF AN UNOFFICIAL SOCIAL EXPERIMENT

Always-on visual connection is causing anxiety.

**Harvard
Business
Review**

“How to Combat Zoom Fatigue”

APRIL 29, 2020



FUTURE BEHAVIOR IMPLICATION

Emergence of the support system for
remote work

- Greater investment in platforms and technology
- Emergence of “private time” and approved disconnection
- Introduction of on-staff counselors

WHAT BRANDS
NEED TO DO

THE BIG DISCONNECT

As consumers try to craft personal coping strategies on their own, they are not getting any help.

Forced unity and goodness
messaging is wearing thin with
consumers

Forbes

*“Every COVID-19 Commercial
Is Exactly The Same”*

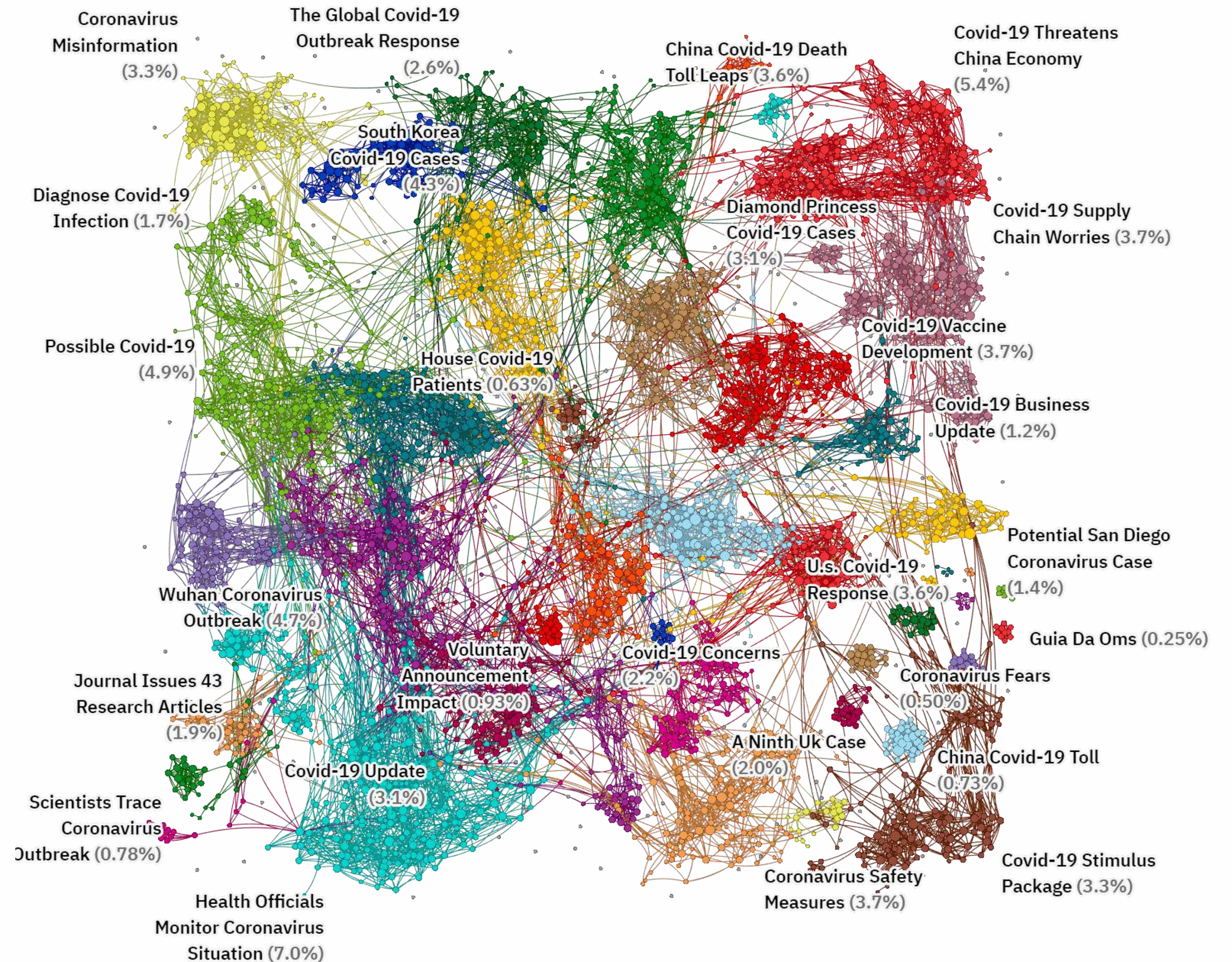
APRIL 19, 2020



There's a gap between news and need.

News coverage focuses on response, while social conversation focuses on coping.

PEOPLE NEED HELP.



BRANDS NEED TO STEP IN TO FILL
THIS DISCONNECT

BUT HOW?

HARTE
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**BEHAVIORAL
BRAND
INDEX**

AN EMPIRICAL FRAMEWORK TO
MEASURE A BRAND'S ABILITY TO
SHIFT BEHAVIOR IN THE EMERGING
EPIPHANY ECONOMY

NINE ASPECTS OF BEHAVIOR DESIGN

CREATIVITY

MAKES ME LOOK AT THE
WORLD DIFFERENTLY

RELIABILITY

ALWAYS DELIVERS ON
THEIR PROMISES

AUTHENTICITY

IS TRANSPARENT,
ETHICAL AND HUMAN

SIMPLICITY

IS EASY TO UNDERSTAND
AND USE

RELEVANCE

UNDERSTANDS AND
RESPONDS TO WHAT'S
HAPPENING IN CULTURE

PURPOSE

CARES ABOUT
SOMETHING BIGGER
THAN PROFIT

RESPONSIVE

KNOWN FOR MOVING
FAST WHEN IT MATTERS

INNOVATION

USUALLY THE FIRST TO
BRING NEW
INNOVATIONS TO THE
WORLD

AESTHETIC

IS BEAUTIFULLY
DESIGNED AND
VISUALLY APPEALING

TWO KEY DIMENSIONS EMERGED

TWO CRITICAL BEHAVIOR DRIVING DIMENSIONS



Drivers critical to **empathy**

- PURPOSE “Stands for something bigger than profit.”
- RELIABILITY “Always delivers on their promises.”
- AUTHENTICITY “Is transparent, ethical and human.”
- RELEVANCE “Understands and responds to what’s happening in culture.”
- SIMPLICITY “Is easy to understand and use.”

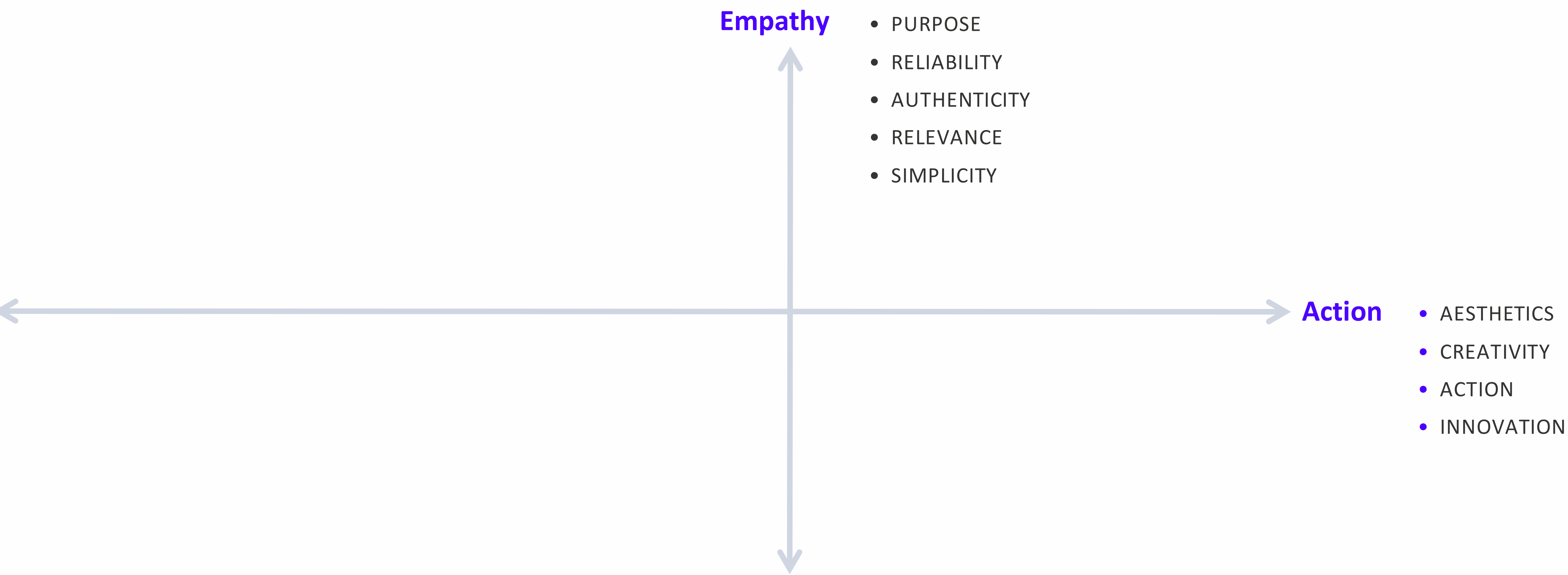


Drivers critical to **action**

- CREATIVITY “Makes me look at the world differently.”
- AESTHETIC “Is beautifully designed and visually appealing.”
- RESPONSIVE “Known for moving fast when it matters.”
- INNOVATION “Usually the first to bring innovations to the world.”

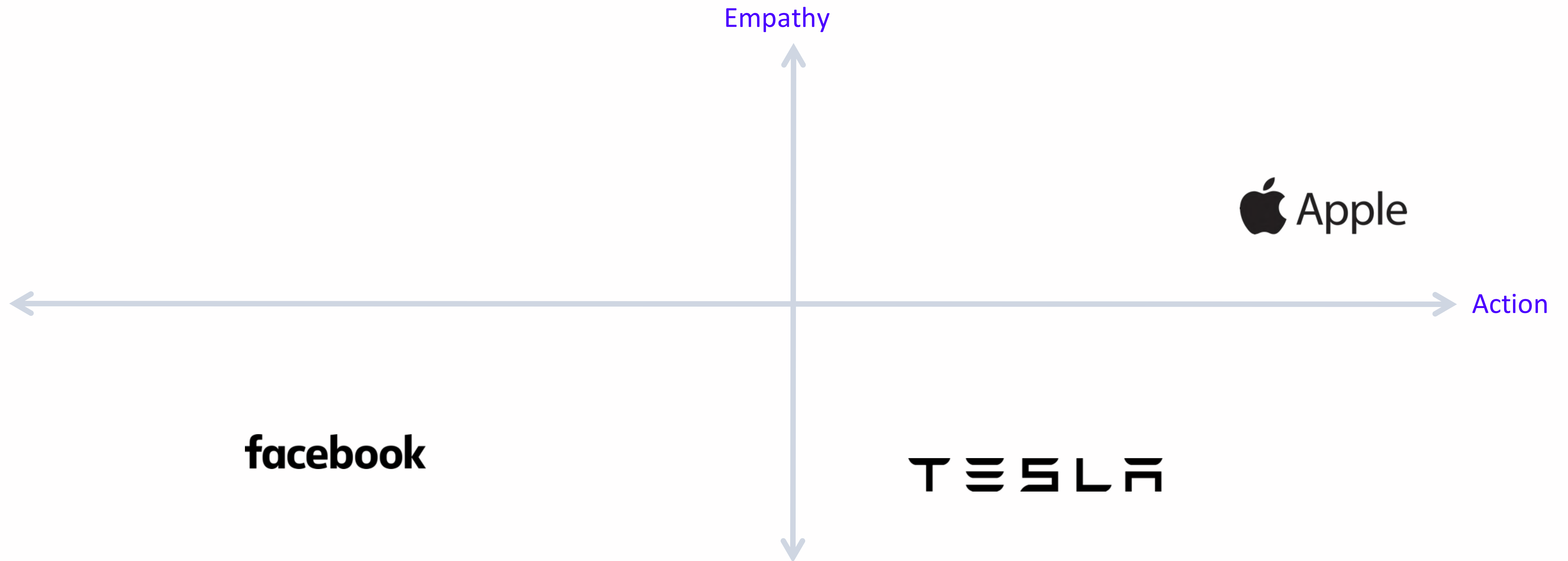
BRAND BEHAVIOR INDEX

Based on the meta drivers of the Epiphany Economy.



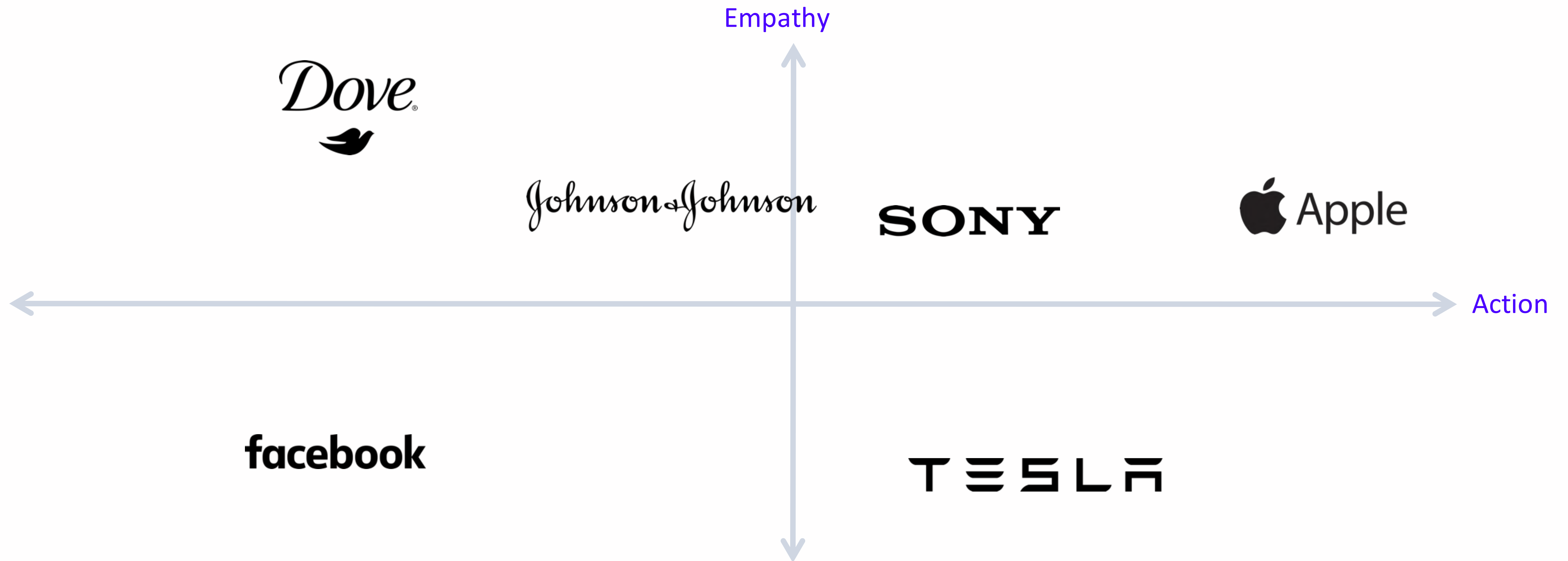
BRAND BEHAVIOR INDEX

Mapping brands along these axes reveal competitive behavior opportunities.



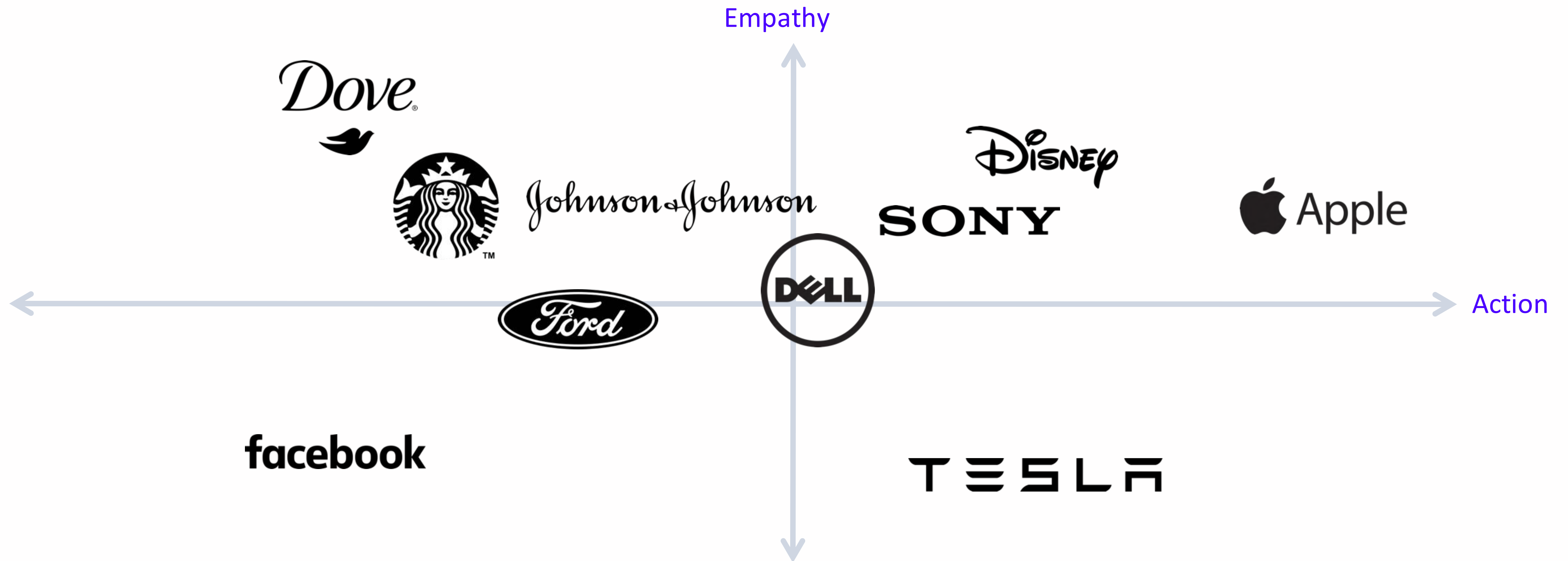
BRAND BEHAVIOR INDEX

Mapping brands along these axes reveal competitive behavior opportunities.



BRAND BEHAVIOR INDEX

Mapping brands along these axes reveal competitive behavior opportunities.



TO GROW NOW, BRANDS MUST NOT
ONLY FEEL, BUT ALSO ACT

WHAT'S YOUR EPIPHANY?

People will reimagine their lives and the structures they choose to be part of, whether political affiliation, community or even brand.

They will expect every brand to have a similar pause, a similar epiphany.

What's your true purpose?

How do you create value now?

What are you giving to the world?

THE EPIPHANY ECONOMY FIELD GUIDE

1

KNOW YOUR
BEHAVIORAL
SCORE

Where do you sit on the Behavioral Brand Index? How are you connecting mission to action? Define what specific behavior design is needed to drive growth.

2

MEET YOUR NEW
MARKET

People have changed. Your target audience shifted everything from behavior to beliefs. Get to know them now – they are not the same.

3

PROVIDE REAL
HELP AND UTILITY

Don't pander; create meaningful inspiration and tools from a deep understanding of the hyper-mindful behavior in the category.

4

EXPERIMENT AND
INNOVATE

New patterns are forming. Create quickly and pilot new ideas, products and services.

Be a first mover. Experimentation is heroic now.

Q & A

THANK YOU!

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