

Trends We See in People's Mindsets and Behaviors

5 online consumer trends

People are...

[Link to insights in appendix](#)

- 1 **A** **Assembling** critical information and content they need to get by
- 2 **D** **Discovering** new connections and nurturing relationships
- 3 **A** **Adjusting** routines and schedules to meet the demands of voluntary isolation
- 4 **P** **Praising** the everyday heroes who have stepped up in this critical moment
- 5 **T** **Taking** care of their physical and psychological needs, and those of friends and loved ones
- 6 **S** **Seeing** favorite experiences in a whole new way

1. Assemble

People are assembling critical information and video content they need to get by.

Seeking the details:

From clear, specific information brand communications to where, how, and when to get something.



“Clorox” search interest up 25x.

Top queries interested in very specific uses — ie. “how to prevent,” “how to prepare,” “how long does it live on surfaces” etc.



People need to help their businesses too. Search interest for **small business loans** is surging.

● small business loans coronavirus

Search term

+ Compare

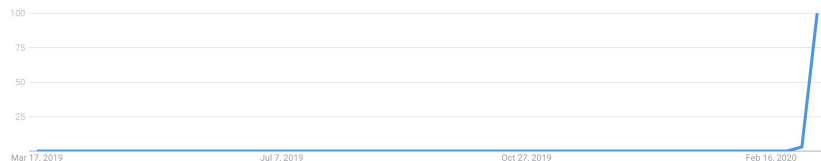
United States ▼

Past 12 months ▼

All categories ▼

Web Search ▼

Interest over time ⓘ



Search interest for “**zoom**” (videoconferencing) are right up there with search interest for CDC.

Monday, March 16, 2020

- | | | |
|---|------|----------------|
| 1 | CDC | 1M+ searches |
| CDC Recommends Cancelling, Postponing Gatherings Of 50+ People Eagle 99.3 FM WSCH • 6h ago | | |
| 2 | Zoom | 500K+ searches |
| BU chooses Zoom for online class transition The Union Journal The Union Journal (blog) • 1h ago | | |



Grocery search interest is focused on delivery and online, plus top search interest like “**in stock**,” “**near me**,” “**delivery**,” “**pick up**,” “**cancellations**.”

Top occurring question searches for 'groceries' from 2020-03 to 2020-03

- | | |
|-------|--------------------------------|
| ★★★★★ | how to order groceries online |
| ★★★★★ | how to get groceries delivered |
| ★★★★★ | who delivers groceries |
| ★★★★★ | where to buy groceries near me |
| ★★★★★ | who delivers groceries near me |
| ★★★ | where to buy cheap groceries |
| ★★★ | what to buy for groceries |
| ★★★ | what groceries should i buy |
| | how to save money on groceries |



Video views related to “**pantry recipes**” and “**cooking**” up 31% Y/Y (U.S., Jan. 1–Mar. 10).

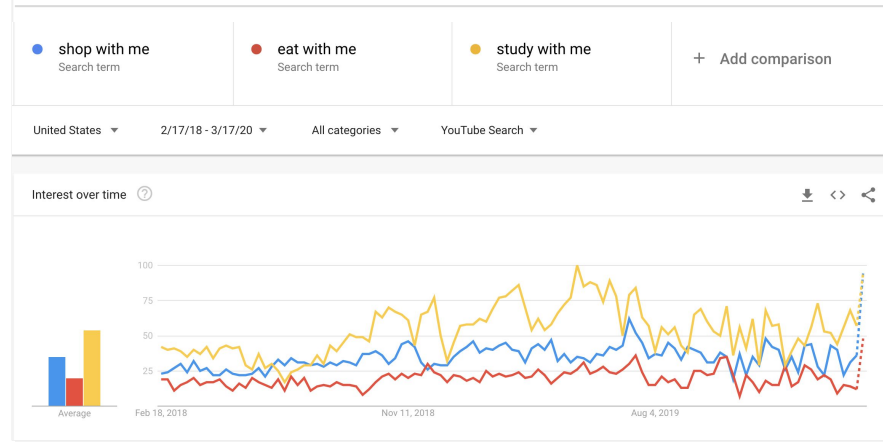
2. Discover

Even as people physically distance themselves, they are discovering new connections and nurturing relationships

Creating new online connections

Search interest for “with me” content on YT is surging:

Students at home don't want to study alone! Views on “study with me” videos are up 54% Y/Y (US, Jan 1 - Mar 10). YouTube categories like “shop with me” and “eat with me,” which had been in gradual decline, are now growing rapidly again.



Video Creators across categories are inviting audiences to join them:

Lifestyle Creator Daniella Perkins:

[Get Ready With Me CoronaVirus Edition](#)

Mom Creator Brianna K:

[Disinfect / Clean with Me](#)

Free to Family:

[Trader Joe's Shop with Me / Quarantine Last Minute Items](#)

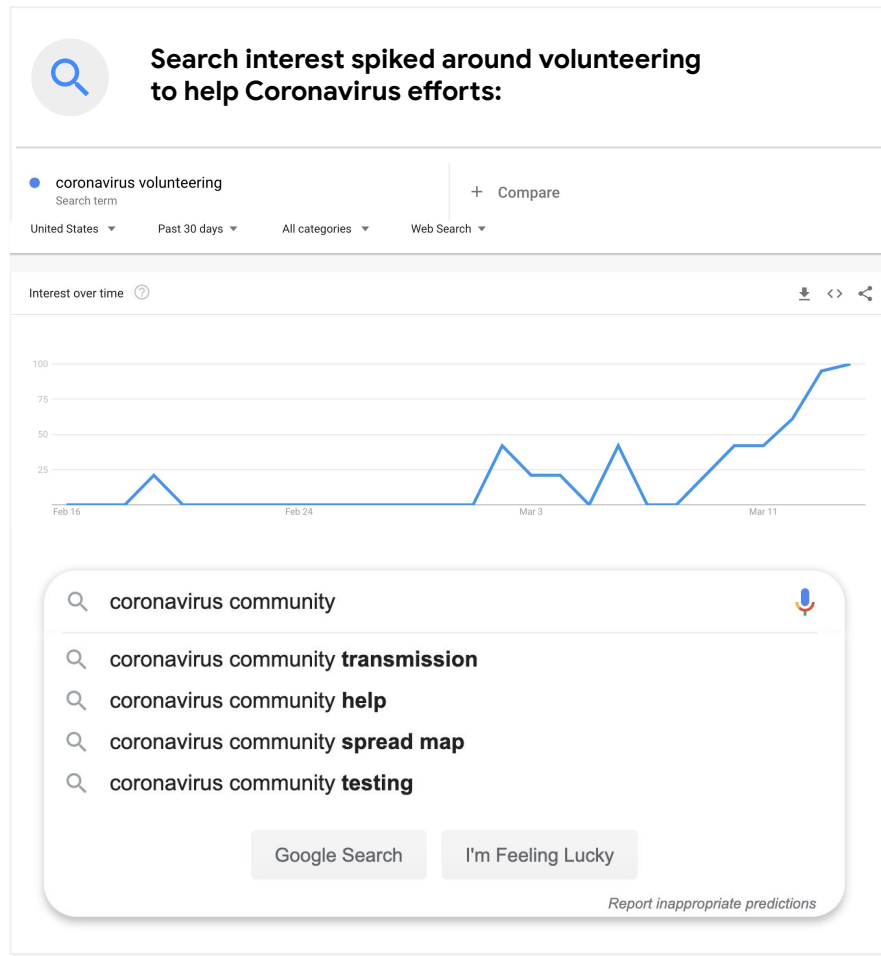
Organization / Planning Guru Do it on A Dime:

[Bulk Cook with Me](#)

While people are isolating, interest in other communities near and far are surging:

People in US, UK, France, Italy, Spain are turning to videos from other countries, seeking information on what to expect and to ask questions of users, leading to a positive sentiment for the word “community” (+0.05).

Steam online gaming smashed its all-time record for concurrent users around the world over March 14th & 15th, peaking at 20MM, with over 6.4MM playing a game together. (Source: Steam Infograph, The Verge)



Love in the time of coronavirus

3. Adjust

As routines and schedules change to meet the demands of voluntary isolation, so do online habits and expectations



“Podcast” search interest is surging during the nighttime (3am, 4am, 5am) versus the typical pre-commute drivetime.



Search interest for “DIY” are spiking at 1am.

Do it yourself

United States, Past 7 days



Search interest for “Home workouts” spiked between March 13 - 16.

Prime Now
Search term

+ Compare

United States ▼ Past day ▼ All categories ▼ Web Search ▼

Interest over time ?



Home workouts
Search term

+ Compare

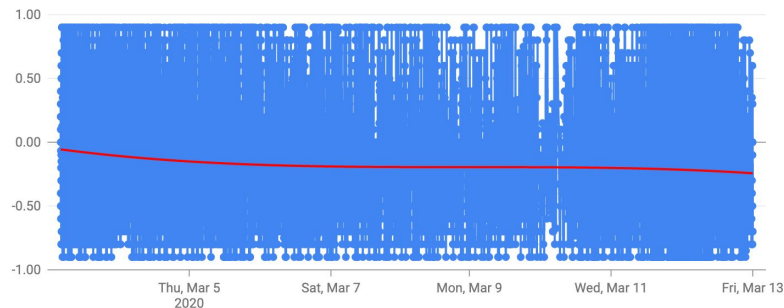
United States ▼ Past 7 days ▼ All categories ▼ Web Search ▼

Interest over time ?



Users notice when people, brands or organizations **don't adapt to change.**

Average Sentiment Over Time



Sentiment on government & corporate responses to COVID-19 (e.g. WHO announcement of pandemic, Amazon employee testing positive, Citibank CEO at White House, etc.) dipped from “neutral” at launch to “negative” just a week later, as early actions were seen as insufficient.

In contrast, UFC & president, Dana White, remain #1 and #2 as the league communicated its adaptability and concern for fans & athletes. And even after league cancelled games, praise of UFC and White continued.



baruch Spinoza 16 hours ago

Dana to his staff after Corona Chaos ends, I want a backup plan for all disasters including:

1. Nuclear attack
2. Alien attack...

[Read more](#)

👍 221 🗨️ [REPLY](#)

▼ [View 6 replies](#)



Jordan 20 hours ago

If Dana pulls this off, I'll defend him all the time in the future, even if I know he's wrong.

👍 146 🗨️ [REPLY](#)

▼ [View 13 replies](#)

4. Praise

People are praising the everyday heroes who have stepped up in this critical moment

There is a growing appreciation for people we rely upon, many of whom are risking their own health or safety to keep others healthy.



"Healthcare workers," "nurses," and "doctors," are among the highest sentiment in threads. Search interest for **"Healthcare workers"** have increased sharply from March 12 - March 16th.

● healthcare workers
Search term

+ Compare

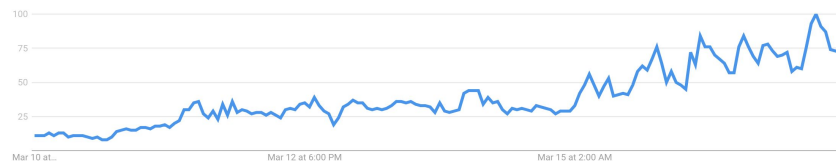
United States ▾

Past 7 days ▾

All categories ▾

Web Search ▾

Interest over time ⓘ



The top viewed video on YouTube in the last 7 days when you search for "nurses" is "Hero Nurses Are Risking Their Lives to Save Others."



Hero Nurses Are Risking Their Lives to Save Others

Inside Edition • 152K views • 16 hours ago

The unsung heroes of the coronavirus crisis are doctors and nurses on the front lines taking care of patients in hospitals ...

New

5. Taking care

As boredom, anxiety, and uncertainty set in, people are taking care of their physical and psychological needs, and those of friends and loved ones



Searches for **“bored”** have spiked significantly in past 7 days.



bored

Search term



Compare

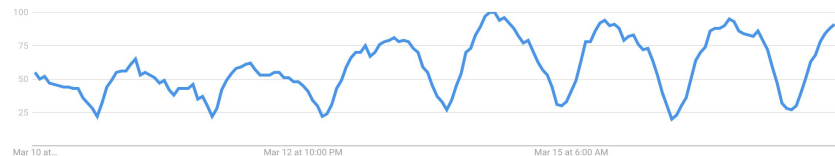
United States

Past 7 days

All categories

Web Search

Interest over time



Search interest around **“bored”** are about **“what to do.”**

Top occurring question searches for 'bored' from 2020-03 to 2020-03

- ★★★★★ what to do when you're bored
- ★★★★★ what to do when your bored
- ★★★★★ things to do when bored
- ★★★★★ what to do when bored
- ★★★★★ things to do when your bored
- ★★★★★ things to draw when bored
- ★★★ games to play when bored
- ★★★ what to do when you are bored
- ★★★ things to do when you are bored
- ★ things to do when bored at home
- ★ fun things to do when your bored
- ★ stuff to do when bored
- ★ things to do when you're bored
- ★ what to do when your bored in class
- ★ things to draw when your bored



In the past 7 days, search interest for **“games”**, **“puzzles”** and **“coloring books”** has increased considerably.

puzzles

United States, Past 7 days



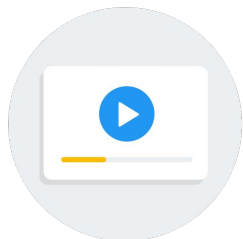
coloring books

United States, Past 7 days



Net/net, users' **experience and expectations** of content is changing:

Increase in watching together,
or in conversation with each other.



Search interest in family friendly movies have spiked 3x since late February.



YT sharing data shows people are sharing COVID-19 videos across a wide range of genres with family and friends via text and messaging apps.

Sharing grew 3x from 3/14 to 3/15 on “[CDC Briefing Room: COVID-19 Update](#)”

Share activity grew 20x from 3/9 to 3/12 on Nebraska Medical Center’s “[DIY Hand Sanitizer](#)” video

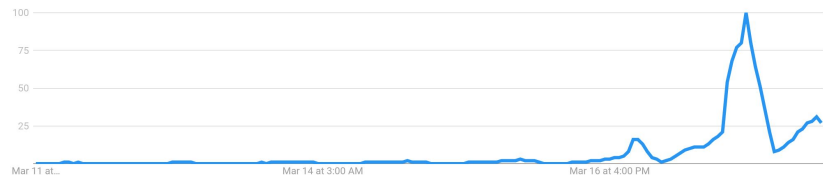
Share activity grew 4x from 3/10 to 3/15 on NBC’s “[How to Prevent the Spread of Germs -- The Office US](#)”



Searches for “Netflix Party”, Netflix’s shared viewing plug-in, have spiked in the past several days. [Google Trends](#)

• Netflix party

United States, Past 7 days

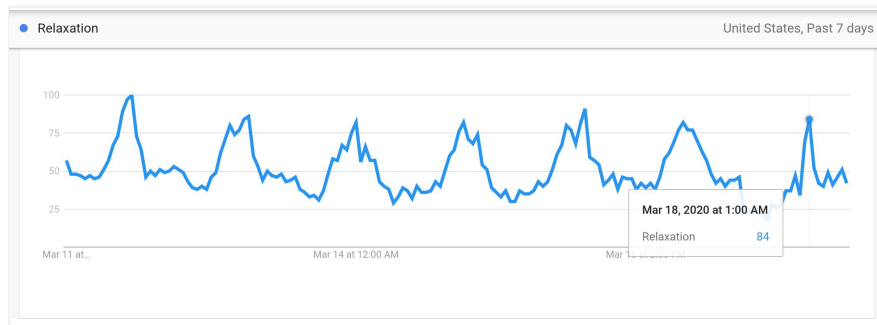


Health and Wellness

- **Space has contracted:** people can't access entertainment content except via home and screens

Yet..

- **Time has expanded:** more time at home, time alone, time with each other (virtually or in person).
- People are looking for ways to manage stress, and stressful work. There was a 4x surge in search for **“Headspace”** [the meditation app] in the past week, with more than 100x for “headspace for healthcare workers”.
- Search interest in **“online workouts”** have jumped dramatically in the past 3 days
- The top viewed videos on YouTube for **“meals at home”** are focused on healthy eating.



6. Seeing favorite experiences

TKTKT

Develop content and media strategies

Five Messaging Ideas Based on Consumer Trends



1 Be helpful as needs evolve

- Give customers credible, detailed, current information. Find new value propositions to highlight.
- Help customers with cancellations, refunds, and customer service.



2 Forge new communities

- Help create connections among customers.
- Help brands align with the right creators, who are establishing communities for the moment.



3 Adjust timing for a 24/7 cycle

- Meet people where they are and when they're online.



4 Go big on promoting heroes

- Celebrate the employees who are keeping the lights on.
- Recognize community helpers who are doing great work.



5 Embrace novelty to combat boredom

- Pivot to platforms and formats.
- Find new ways to serve customers.

1 Be helpful as needs evolve

- Give customers credible, detailed information about things they need. Be objective and clear. Reinforce “we are here to help you.”
- Regularly update communications to keep customers current across the state of your business.
- Be flexible: Help customers with cancellations, refunds, and customer service.
- Define your value proposition to users. For instance, offering sneak peeks at content.
- **Example:** [CVS](#) Caremark is working to waive early refill limits on 30-day prescription maintenance medications & offering free delivery of rx medications



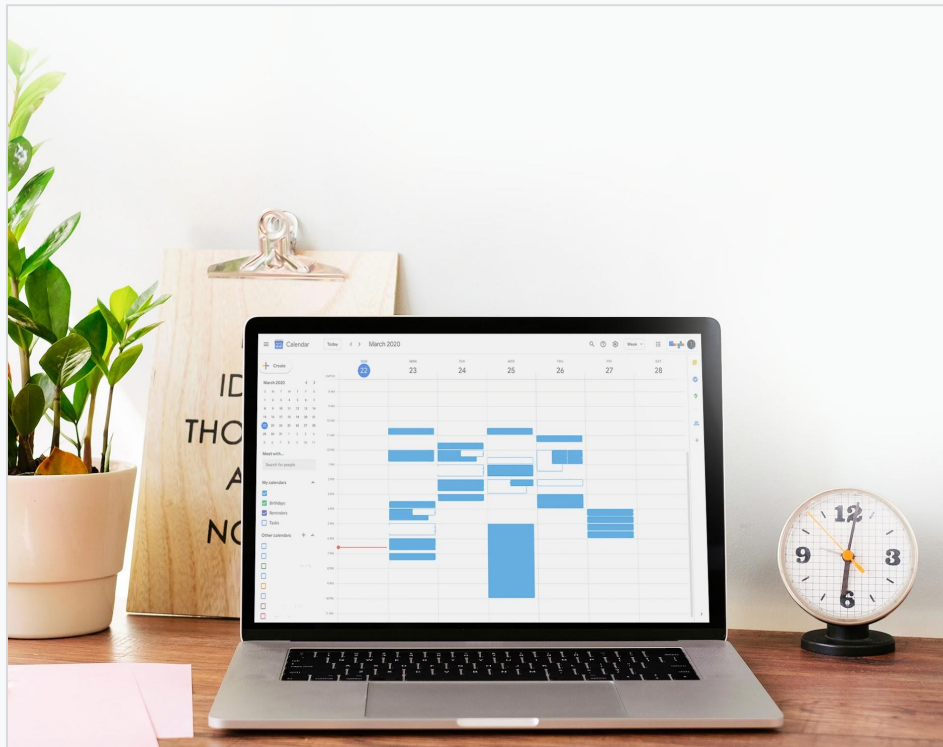
2 Forge new communities and connections

- Help create communities among customers and help people connect, both locally and globally.
- Align brands with the right creators, who are establishing communities for the moment.
- Participate in the new social dynamic of co-viewing, co-commenting — physically and virtually.
- **Example:** The CDC YouTube channel features videos of communities coming together in Italy (singing from balconies) and Spain (a fitness instructor hosting a workout for apartment dwellers)



3 Adjust timing for a 24/7 cycle

- Communicate and connect with customers at any time, especially during parts of the day that have not previously been opportunities.
- Be present in the early hours of the morning or late hours of the evening.
- Let consumers know that solutions are available whenever, wherever.
- Publish often: There is a need for content that informs, entertains, connects, and promotes wellness
- **Example:** grocery stores [adjusting hours](#) for seniors.



4 Go big on promoting heroes

Proprietary + Confidential

- Look for people who are helping, and find ways to support or celebrate them. They might be employees, people who use your products, or people who could use support.
- **Example:** Grocery stores have reserved hours for elderly or otherwise sensitive shoppers to be able to get food and other necessities without exposure to the larger population.
- **Example:** Delivery men and women are keeping households provisioned with food, medicine, and vital supplies.
- **Example:** Doctors, nurses, and health care workers on the front line.



5 Embrace novelty to combat boredom and anxiety

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- Find ways to enrich people's lives as we isolate and combat both boredom and anxiety.
- Facilitate collaborations with the outdoor spaces people crave to visit, new connection points with cultural institutions, longer form, immersive content (concerts, operas).
- Join the conversation around home-based health and well-being.
- **Example:** [NBCUniversal](#) now offering its newest movies, including *The Hunt* and *The Invisible Man* for affordable rates on-demand.



When it comes to media, not every advertiser is in the same boat

4 Customer Types



Triaging

Currently focused on cash flow, operational and business continuity.



Assessing

In sound shape but uncertain what the coming weeks and months may mean for the business.



Pivoting

Seeing a shift in the business model that both poses challenges and offers opportunities.



Investing

In a position to expand customer relationships and provide help to new audiences, markets, and customers in the current time of need.

For Those Triaging....

Proprietary + Confidential



Invest in marketing **only** if it generates positive cash flow in next 30 days

- There are profitable customers looking for you 24/7. Make sure they can find you.
 - Identify your most profitable products and customers. Use ads to reach them, and drive cash flow where there is still positive ROAS for you. This also maintains equity in the market for when things return to normal.
 - Reset business goals and metrics to avoid navigating a rudderless ship. Clearly set new goals and metrics whether you are effective at reaching them. Let numbers drive strategy over emotion.
- Set up a real-time learning plan to quickly adjust spend to capture largest returns and make sure your KPIs are adapted to the situation.
 - Use internal and partner data to understand customer behavior. Don't make assumptions.

For Those Assessing....

Proprietary + Confidential



Invest for short- and medium-term payback; get prepared now for recovery

- As in “triaging” mode, invest in marketing to your most profitable products and customers, but with a medium-term outlook (e.g., 6 months).
- Work on campaign hygiene so it’s in an A+ position once the crisis is over.
- Consumers are searching for helpful information now more than ever. Revisit search and location settings to ensure they are up to date (e.g., store hours, online and delivery options).

For Those Pivoting....

Proprietary + Confidential



Understand how to shift spend and strategy based on changes in business model and consumer behavior

- New customers may be looking for you. Make discovery easy.
- Amid rapidly shifting media consumption patterns, increase reach and attention by redirecting marketing investment to growing categories and channels.
- Reimagine how you plan and measure outcomes (e.g., from omnichannel to e-commerce, from selling products to building brand equity).
- Identify markets to promote e-commerce vs. local.
- Pivot where appropriate to e-commerce and identify best categories and products to push.
- Maximize use of ads automation (machine learning) to stay on top of a rapidly changing situation.

For Those Investing....

Proprietary + Confidential



Find new, additional ways to connect with and help customers

- As demand for your products/services increases, offer helpful, timely information (e.g., when item will be in stock, product alternatives).
 - Stay on top of consumer trends, and update services and creative to be helpful and timely.
 - Target with messages to different segments (e.g., no need to offer interest relief to customers who don't carry a balance).
- Be nimble as average order size, conversion rates, customer lifetime value, and other metrics change, even when short-term reduction in some key metrics created long-term benefit.
 - Take advantage of new formats and offerings (e.g., if you've lost sports reach, expand your strategies on YT.)

Inspiration from other brands

Marketing pivots other brands have implemented

Get the tone right



Ikea Spain [commercial](#), #stayhome



Guinness Don't worry we'll march again [commercial](#).

Give customers a break



JetBlue & Southwest led the way in waiving fees and offering flexibility on changes to flight itineraries and cancellations.



New **Ford** ad highlighting car payment relief plan and Ford being there through previous difficult times [here](#).

Shift business model



Disney: Moving streaming release of Frozen 2 up to this Sunday from June 26, sacrificing some box office/DVD sales.



Starbucks: Moving to “drive-thru only,” “limited-seating,” or “mobile-order only.”

Serving public good, doing the right thing



New York Times: Dropped its paywall for articles related to COVID-19.



LVMH shifting production from perfume to produce hand sanitizer [here](#).

Being helpful



Slack offered up best practices for managers tasked with transitioning teams to remote/distributed models.



Samsung: Offering phone sanitization service for any type of phone for free in U.S. and 18 other markets using UV-C light.

Marketing principles Google has implemented



Global guidance, local decisions

Top-down control of content and messages, and leave many decisions in the hands of local teams.



Audit and assess channels and creative

Conduct a thorough audit of every possible touchpoint for the brand across paid and owned media.



Get the creative right

Set new guidelines for creative that are consistent with the current situation as well as with brand values.



Continuity and value

Evaluate what's appropriate, what's business priority, and what's most relevant to customers.



Using every opportunity to help

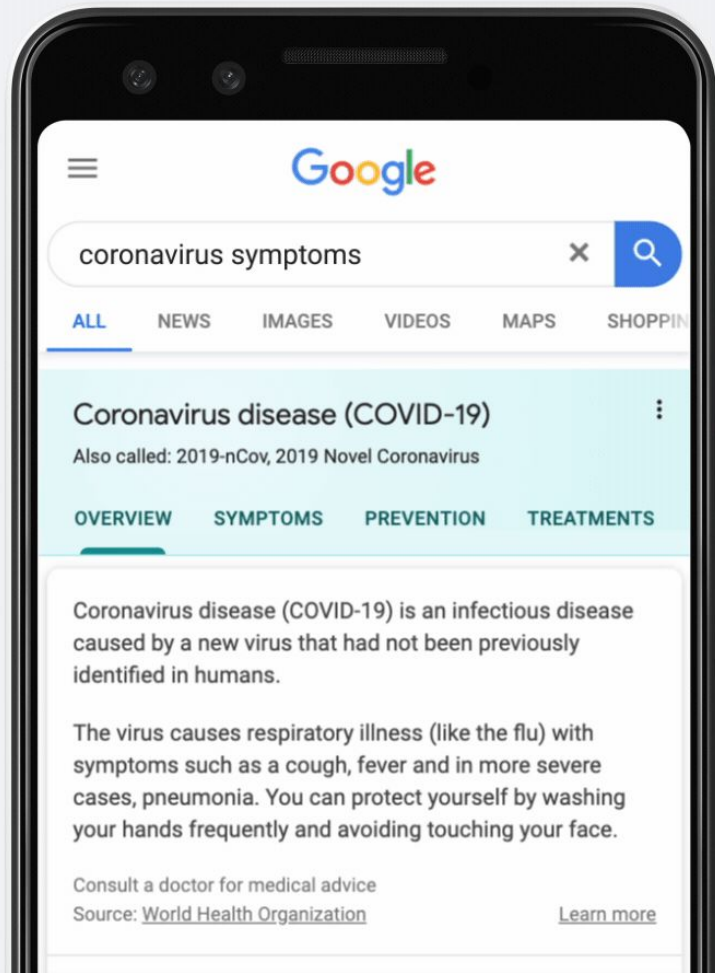
Reviewing all of our owned media (websites, properties, social media, stores) to help people.

Thank You

Appendix: How Google is helping

Providing correct and informative information

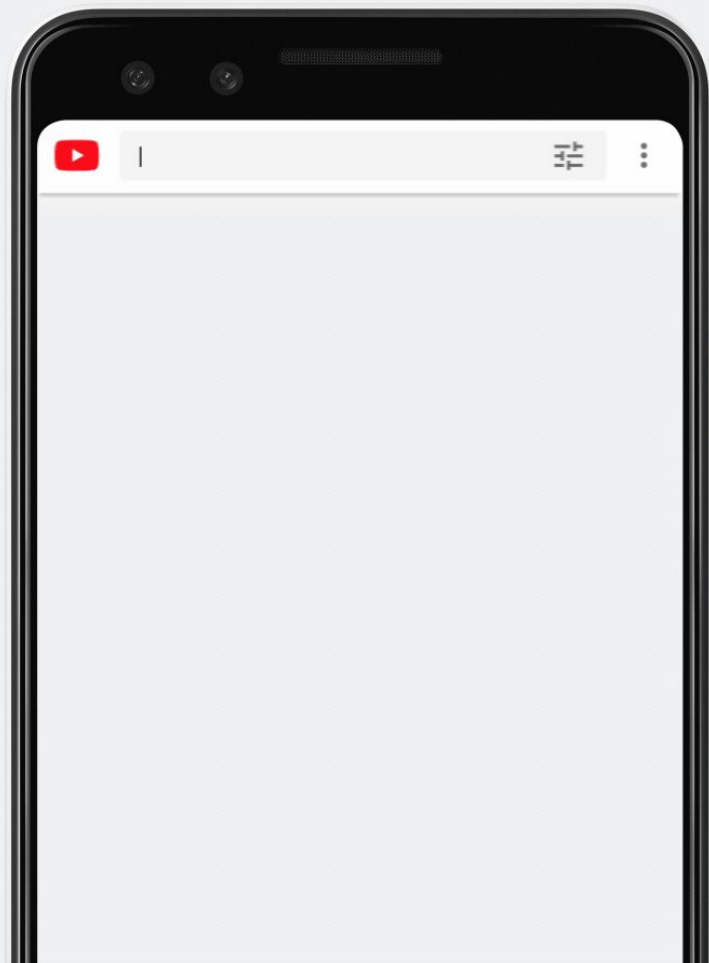
For people specifically looking for information about [symptoms](#), [prevention](#), or [treatments](#), Google teams are working to [expand our Knowledge Panels](#) for health conditions to include a COVID-19 panel.



Connecting people with authoritative organizations

Using our homepages to direct users to the [World Health Organization](#) or other locally relevant [authoritative organizations](#).

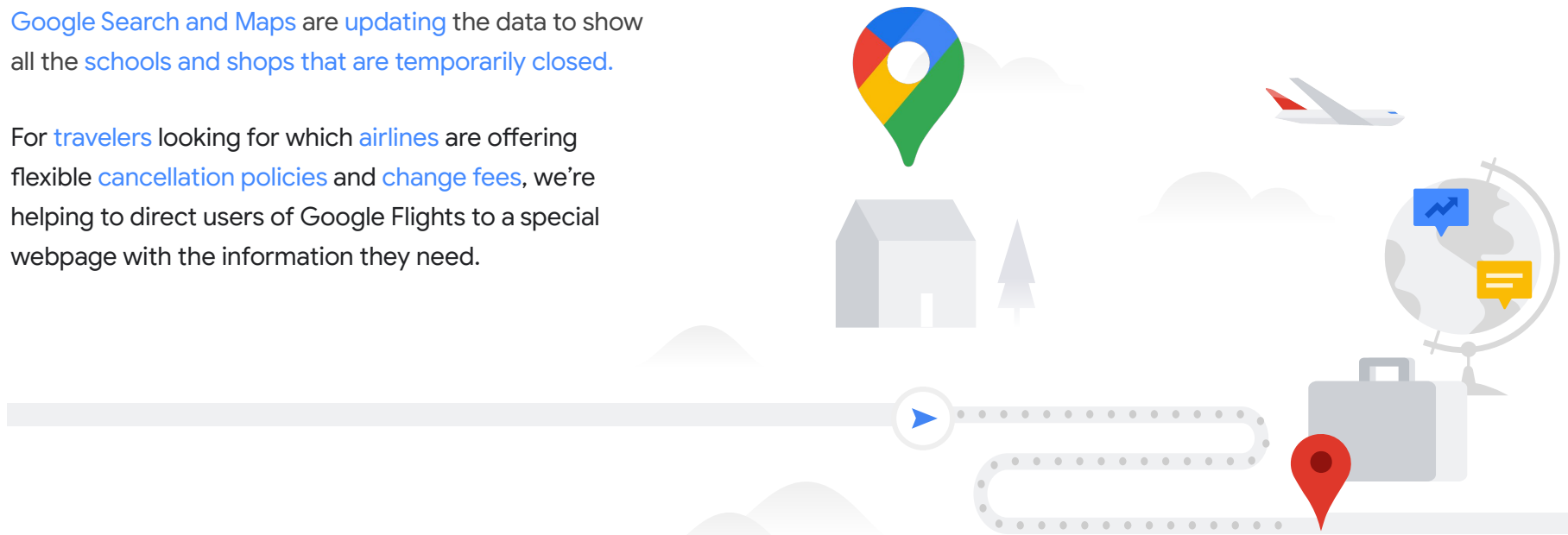
Google is donating [ad inventory](#) to [governments](#) and [NGOs](#) in impacted regions to use for [education](#) and information.



Helping people find the information they need

Google Search and Maps are [updating](#) the data to show all the [schools and shops that are temporarily closed](#).

For [travelers](#) looking for which [airlines](#) are offering flexible [cancellation policies](#) and [change fees](#), we're helping to direct users of Google Flights to a special webpage with the information they need.



Protecting people from misinformation



Trust and Safety

Safeguarding our users from phishing, conspiracy theories, malware, and misinformation.



YouTube

Removing content claiming to prevent the coronavirus in place of seeking medical treatment.



Google Ads

Blocking all ads capitalizing on the coronavirus. We are also helping WHO and government organizations run PSA ads.



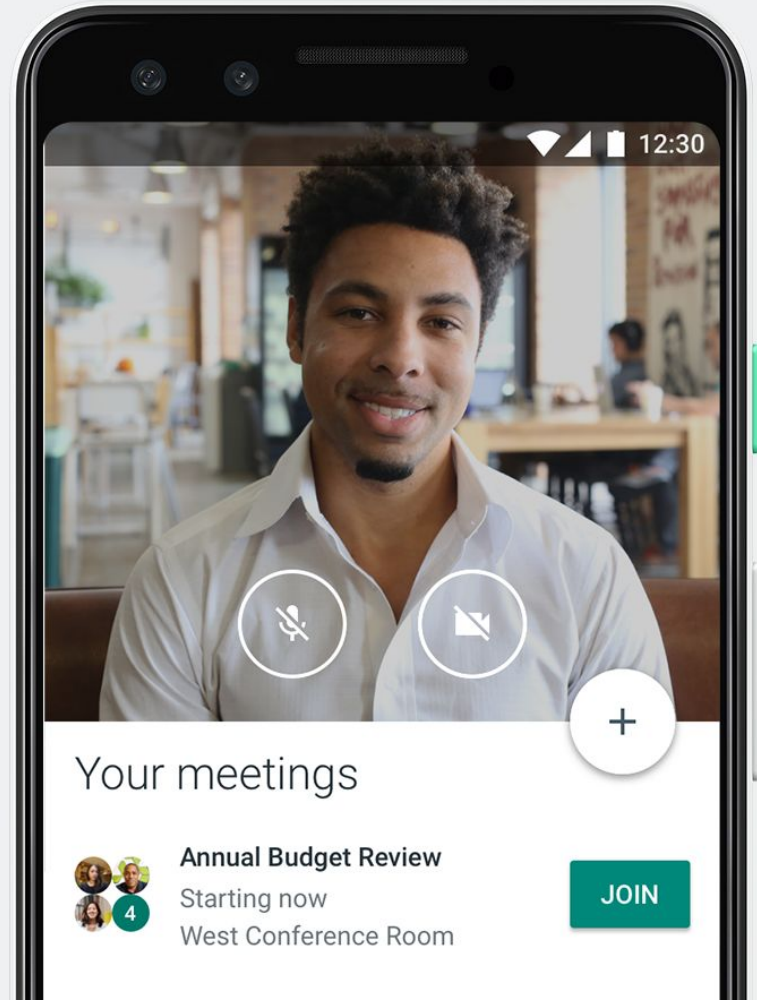
Google Play

Prohibiting developers from capitalizing on sensitive events by strictly prohibiting apps that feature medical or health-related content or functionalities that are misleading or potentially harmful.

Enabling productivity for remote workers and students

Employees, educators, and students have [free access](#) to main [Google services](#), as well as [G suite](#) and [advanced Hangouts Meet](#) videoconferencing capabilities until July 1.

This initiative is to [help](#) workers and students to [connect virtually](#) with their [communities](#) while they are unable to do so in person.

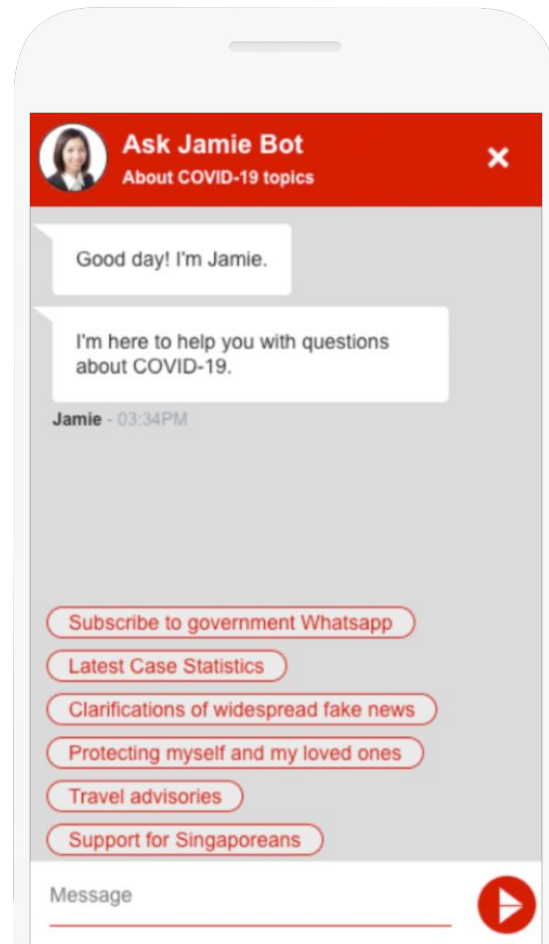


Supporting relief efforts and government organizations

Google donated \$25million in ad credit to the WHO and government agencies, and will provide more if there is a need throughout the year.

Supporting local government with tech solutions.

Example: In Singapore, a chat bot promotes authoritative public information about COVID-19.



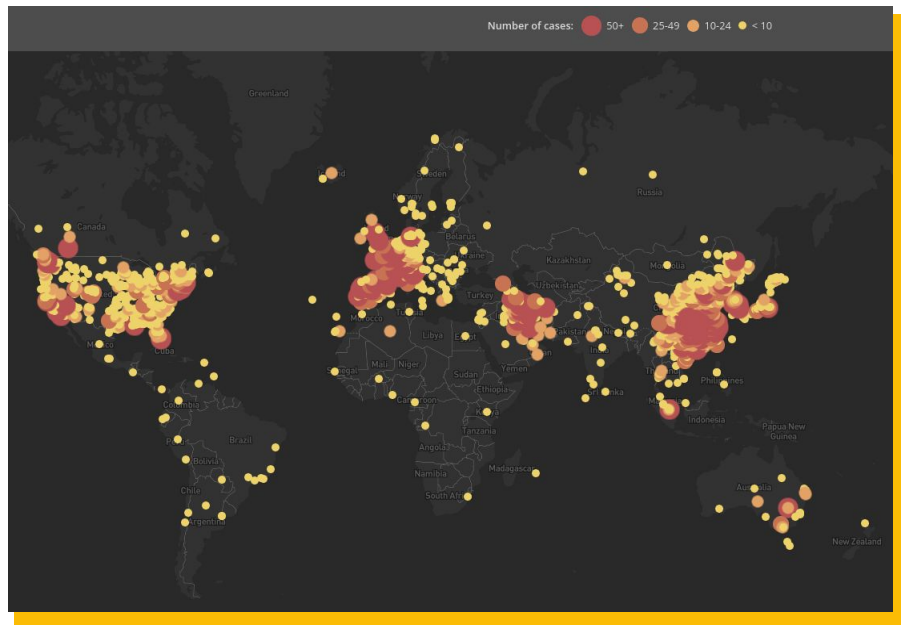
Supporting relief efforts and government organisations

Proprietary + Confidential

Google.org is committing **\$50 million** to the global COVID-19 response, focusing on health and science, access to educational resources, and small business support.

Example: Matching up to **\$5 million** in donations to the COVID-19 **Solidarity Response Fund** for the World Health Organization (through the UN Foundation).

Example: **\$500,000 grant** to a team of researchers, epidemiologists and software developers at **Boston Children's Hospital** working on HealthMap.



Advancing health research and science

DeepMind used the latest version of its **AlphaFold system** to release **structure** predictions of several **proteins** associated with SARS-CoV-2, the virus that causes COVID-19.

Alphabet's Verily is working in collaboration with California state, local, and federal health authorities to help establish testing sites in the San Francisco Bay Area and on an online tool to increase risk screening and testing.



3 principles for at-home marketing

With hundreds of millions of people indefinitely working, learning, and sheltering at home, the rules have changed

- 1 In the new reality, people have shifted their needs and patterns of consumption. They're looking for and buying services and goods they might not have a the months ago, and they are not seeking services and goods they were once in the market for.
- 2 The day in the life of the consumer has fundamentally changed, and with it, the consumer journey is new and unfamiliar.
- 3 Patterns of media consumption are different. What media people consume — and when and where they consume it — has changed.

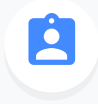


Resources to help small businesses manage through uncertainty



Communicating with customers

- Edit your hours of operation on your [Business Profile on Google](#).
- Use [posts](#) to communicate special offers or inventory updates on your [Business Profile on Google](#).



Communicating with employees

- Make a [business continuity plan](#) and share it with employees via email.
- Give local managers the authority to take appropriate actions based on conditions of their location.



Working remotely

- Prepare to effectively work from home with [these tools and resources](#) from Grow with Google.
- Collaborate using a [shared document](#), a [quick conference call](#), or by creating an [email list](#) or a [chat room](#).



Modify your advertising

- [Edit](#) your ads as needed to let customers know whether you're open for business and if you offer helpful services like expedited shipping.
- [Pause](#) campaigns if your product availability is impacted by supply chain issues or increased demand.