

THOUGHT PIECE

Six things you need to know about your audience during the current pandemic

Comparative
Linguistic Research



Zoom quizzes and working in pyjamas are the norm of today. The revered thirst for the pub has now been replaced with new evening behaviours such as bingeing the latest Netflix docuseries.

We don't need science to know that the world has irreversibly changed since lockdown.

Shifts in the environment have naturally created shifts in our psychology and behaviour, making the common phrase "you want what you can't have" seems evermore poignant today than before. And so it is unsurprising that lockdown has produced an undercurrent of widespread cravings among the UK population, with thousands of tweets confessing how they "just can't wait to..."

At the other end of the spectrum, lockdown has magnified and accelerated many of the frustrations people have with the world. In some cases, political decisions, refund policies and customer service teams have driven people to the point of no return - what we refer to as 'final-type statements' - e.g. "I will never understand/forget/buy/use".

Knowing such anomalies in sentiment and subtle transformations in consumer habits offers a trove of insight that we would benefit from peering into. Fortunately for marketers, much of this information is out there in the social media stratosphere, it just requires a bit of innovation for leveraging.

Methodology

At this time, it isn't possible to interview 20-30 people to discover any emerging behavioural trends during lockdown. Even if this was possible,

we could still only capture the thoughts from a very small cohort. Faced with this obstacle, LAB used Comparative Linguistic Research to delve into the pre/during-lockdown brain of hundreds of thousands of Tweeters.

We selectively looked at hundreds of thousands of tweets where people discussed:

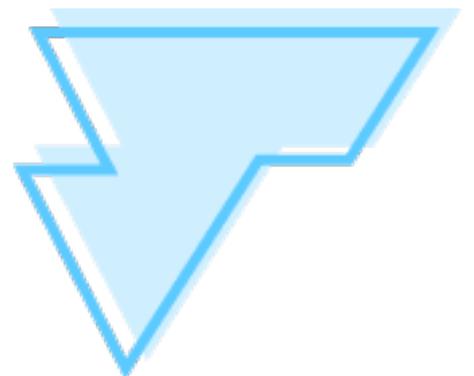
Desires - e.g. tweets including the phrases:

- "I/we can't wait to",
- "I'm excited to", etc.

Final-type frustrations - e.g. tweets including the phrases:

- "I/we will never use/buy", etc.

This data-driven approach provides a method for understanding behaviour changes based on collective language patterns. An approach that replaces gut feelings with evidence. Over-indexed topics in these desire/frustration contexts revealed several insights into how the typical Lockdowner is behaving in this time. Here are 6 insights that comparative linguistic research revealed to us.



People are excited/looking forward to:

January (Pre-lockdown)

Get home

Get paid

Dates in the future

Find out / surprises

Movies / films

May

Returning to the office

The 15th June

Charity shops opening

Gardening

Positive sentiments about loved ones, hugging them and birthday wishes

Pubs and drinking

Final-type Frustrations:

January

Football

Politics - e.g. Brexit

March

NHS and Testing

Take for granted / moan

Fear / worry

Pub drinking

April

Care home

Mistrust for the media

Hate / anger

Journalists

Customer Service

Deaths

May

Geographical names -
e.g. UK, London

Airlines

Individuals - e.g.

@BorisJohnson

@Pritipatel

@GMB

How are final-type, commercial frustrations changing through lock-down? (E.g. "I am never buying...")

March

Hotels - e.g.
Britannia

"Ashamed"

Unethical words -
e.g. corrupt

April

Delivery

Wowcher

Parcel

Non-delivery

May

@tuiuk

@paypal

Credit card / Credit
card companies

Electricity & Electrical
products - e.g.
consoles

Mar, Apr, May*

Virgin

Refunds

"Weeks ago"

"Customer service"

Hotels

*compared to the standard English language model

Key takeaways

- Before lockdown people couldn't wait to get home and get paid. Now, they're excited about returning to the office. The eagerness to get paid has diminished in lockdown, sparking an interesting question: does money lack emotional tangibility when we can't imagine spending it?
- There is a rise in excitement about charity shops opening in lockdown as a result of people decluttering their homes. Now would present the perfect opportunity for socially responsible 'green' campaigns (e.g. recycling) to take advantage of as many are in introspective mode with a greater abundance of time around the house than normal. As well as gardening, what other crafty hobbies will emerge and stay throughout lockdown?
- Widespread frustrations for lack of clarity and explanation among media and political members. People have literally stopped watching/reading particular journalists. In lockdown, it appears that people need openness now more than ever.
- People are less likely to profess their excitement for surprises and finding out things in the future during lockdown. With the upcoming uncertainty, people have less to plan and look forward to. Could this change our mentality towards immediate gratification?
- In tweets outlining definitive frustration (e.g. "I will never..."), the phrase 'customer service' has been mentioned 1252x more than normal. Need there be any explanation to outline how critical it is that companies interact with their customers in the right way. With national anger for mistrust and ambiguity, companies must now display openness, authenticity and reassurance more than ever before.
- Over lockdown, people's frustrations have focussed heavily on hotels, airlines and now delivery. Poor customer service entrenched in the refund process has resulted in such public irritations. Might credit card companies who have recently been mentioned in these frustration contexts be targeted next?

1 Excited about returning to the office but not about getting paid

Prior to lockdown, people were 4.5x more likely to say that they couldn't wait to get home from work and to get paid. In May, things have flipped, people now are more likely (4.4x) to say that they can't wait to return to the office.

Naturally, people are missing the sociability of the office while many others crave the physical environment that provides a stark contrast to those working on the sofa while simultaneously looking after a toddler.

What raises the eyebrows most is that people appear to be less excited about receiving their paycheck. Without the monthly outgoings associated with 'normal' life (e.g. cinema, retail shopping, meals out, etc), people may feel less inclined to show excitement. It could be inferred that the excitement for receiving money is inherently linked to the excitement of what that money can be spent on. This presents

an interesting philosophical and behavioural economic thought: might the emotional weight of money inflow be equal to the opportunity for money outflow

Alternatively, people may be saving more therefore payday is demanded less. (The same could be true for those cutting back while on furlough.) Nevertheless, it will be interesting to see whether (1) going back to work changes the opinion of getting paid, and (2) whether the gradual opening of non-essential shops brings about a change in sentiment on the once craved payday.

Both points are extremely important rungs on the marketing and SEO ladder. Keeping tabs on how emotion towards payday begins to tilt will no doubt inform us on the subsequent, subtle changes in consumer behaviour - a gem companies will compete to discover first.

2 The rise of decluttering

Who would have predicted that people can't wait for charity shops to reopen - a topic that was not mentioned at all pre-lockdown. Widespread cleaning and decluttering appears to be the underlying driver to influence this unusual eagerness.

This suggests something atypical: thousands of people across the UK are decluttering their houses during lockdown. Perhaps the new-found

abundance of time at home has given people the opportunity to tick off all of the boring jobs previously pushed down to the bottom of the priority list. Might being at home magnify people's attention to these jobs, elevating a level of Zeigarnik tension (Burke 2011) that didn't exist pre-lockdown?

This insight is important as if people are in 'cleaning introspection mode' then other

habits might be picked up without friction. New behaviours might include craftsmanship, cooking, gardening (which was in fact 2.8x more likely to be mentioned in May than pre-lockdown). From a search/marketing viewpoint, these findings allow us to make inferences about how the lockdown consumer is thinking. Strategies can be shaped to ride the wave of these new-found behavioural habits. To give an example, recycling and waste-reduction campaigns would no doubt observe vast success if targeted now as opposed to pre-lockdown. Company strategies need to adapt to the new environments consumers are thinking and living in.

Like it or not, we've all been forced to get accustomed to the abodes that we each reside in. As a byproduct of increased exposure, our attention to previously glazed over details around the house has been dialed up. The blinkers have come off as we notice the 'never worn but still there' clothes in the wardrobe or the dodgy bit of paintwork in the bathroom.

For companies in the homeware industry, now is the time to accommodate this elevated attention. Marketers would benefit from signposting the cues that trigger this introspective-tinkering behaviour that is inside many of us during lockdown. Mirroring the 'tick it off jobs' people seem to be going through may be an effective strategy. Framing marketing strategies in this way will no doubt result in an uplift of sales as lockdown consumers want to relieve the Zeigarnik stress tied to the incomplete tasks that they have put off for too long but can now no longer avoid.

Interestingly, the decluttering behaviour that we are seeing may symbolise a wider movement among members of lockdown: a movement

towards minimalism. The inability to interact socially with others may have led to a fall in people's perceived social pressures. In lockdown, less people may be thinking about what others think of their clothes and what their house needs to look like. Lower social exposure naturally comes with lower social judgement. Following this idea, it could be inferred that lockdown consumers may be gradually learning that they need and even want less stuff to be happy.

In the book 'Happy' by Derren Brown he outlines a thought experiment. To paraphrase, if you woke up one morning and everyone else had vanished what would you do? You could move into the biggest house, get the fanciest car and wear the most designer clothes. Yet in reality, whilst initially you might complete some exciting foibles, you would probably soon turn to living in a small comfortable house and wear comfortable clothes. This highlights something key: a lot of the behaviours we exhibit are influenced by the perception of others. In a world without social interactions, we do what is easiest.

I can't help but think that recent lockdown life somehow resembles this world.

Might this concept explain the decline by 20-25% in sales from online fashion giant, ASOS, in April (Retailweek, 2020). It should be noted that these ideas are hypothetical and iterative research is needed to measure the changes that are occurring. Though it may well be a time for readjustment for many companies in the 'leisure purchasing' industries such as fashion. If customers feel that they now need less then strategies will have to be careful to address this. Albeit, we can only wonder whether the effects will be temporary or here to stay.

3 What we can learn from the 15th June

Naturally, thousands of people have tweeted their excitement for non-essential shops to open on the 15th June. Whilst policy change that can affect our day-to-day lives is deemed exciting, it is somewhat concerning that masses of people are expressing how they “can’t wait” to go out - troubling words for the ears of social distancing.

This does reveal something special about comparative linguistic research, though. National sentiment around the re-opening of shops might inadvertently offer a precursor for changes in the R value for Coronavirus outbreak. If significantly more people are proclaiming their excitement to

go shopping/drinking then can this inform us on expected future behaviour?

This form of predictive modelling via linguistic narrative could be truly influential for both the private and public sector. Yet the concept of deducing consumer psychology via collective language patterns is not something new... This type of design has been used to understand market sentiment, answer unknown questions about customers, and even learn what words are associated with the successes of sales emails. As we’ve discovered at LAB, the range of linguistic research is practically unlimited.

4 Emerging distrust for the media and anger for the unknown

In March, the NHS was 16x more likely to be mentioned than pre-lockdown in tweets that expressed definitive frustration (e.g. “I will never...”). Deeper digging revealed that public annoyance was associated with a lack of understanding (e.g. “We will never know why...”).

The general sentiment in March was of fear/worry which shifted to anger in April. It is not possible to pinpoint one culprit for this change in emotion, however, the following insight suggests something key: people were 2x more likely to mention ‘journalists’ and say ‘stopped watching’ in April final-type twitter contexts (i.e. tweets such as “I have never...”).

People were also 16x more likely to mention ‘care homes’ in these contexts in May, with many expressing deep perturbation by the perceived negligence for those in care homes and not knowing the statistics on Covid-related deaths.



“I want journalists to hold the government to account for their actions or failings... I have given up listening to the journalists”

Fast forward to May, public frustrations have shifted from topic to individual. Mentions of the twitter handles @GMB, @BorisJohnson (19x more likely to be mentioned than in April) and @PritiPatel are significantly higher than in previous months.

These findings from across the last few months tell us something incredibly useful about the nation's psychology during lockdown. We hate being in the dark and unclear about the news we are hearing. Such frustrations are so high that people 'will never' go back to their normal habits such as watching Good Morning Britain.

People actively express that they can never "go back", "trust", "forget" and "understand" why Government members have made some of

their decisions. Lack of clarity, media bias and misinformation has tarnished the once gleaming image for many individuals and companies.

Crucially, the data shows us that obscurity between people/companies and their actions can bring about a strong torrent of frustration.



"People need to ditch @GMB and watch @KayBurley on @SkyNews. I did a few weeks ago and I'll never look back."

5 Commercial frustrations: the poisoned chalice of customer service

To fine-tune our linguistic research, we adapted the search criteria to only pull tweets of the following ilk: "I/we will never buy/use". This enabled us to spot the pockets where people had experienced their last straws with companies/industries.

The hotel industry was in the firing line at the start of lockdown. In these final-type contexts (e.g. "I will never buy"), the word hotel was mentioned 42.5x more than pre-lockdown. Emotionally-charged words such as 'ashamed' and 'disgraceful' were thrown towards many hotel chains.

Next month a new target of frustration emerged: delivery. Mentions of delivery in final type contexts (e.g. "I will never...") were 6.1x more likely to be

present in April compared to March. This illustrates two points about people's behaviour at present: (1) people are ordering more, and (2) have a lower threshold for problems with delivery.

For companies, managing customer expectations around the delivery processes is critical. Dopaminergic spikes associated with rewards are not directly related to the size of the reward but to the size of the gap between reward and it's expectation. This explains why finding £20 on the floor feels a lot better than reclaiming a borrowed £20 from a friend, despite the reward being physically identical.

Now more than ever is this principle true for companies and the delivery experience that they

offer. Openness and authenticity builds trust among audience demographics. We only need to be reminded of the Pratfall effect (Aronson, Willerman, and Floyd,1966) to understand how acknowledging small errors can make an entity feel more likeable. So companies would benefit from erring on the side of caution (i.e. causing small annoyance in customers by being open) than deal with the grander, lasting effects of misaligning consumer expectations with reality (i.e. customer never uses brand again).



"@TUIUK Its disgusting. I will NEVER use @TUIUK again. There were 19 of us travelling this year so thats 19 customers they have lost for good"

Again, the angle slightly altered in May where people began to point fingers at TUI, Virgin, Airlines and Paypal. All frustrations on social media chimed the same chord how people were angry about the way they were treated during the refund process.

It speaks volumes that the phrase "customer service" is 1252.5x more likely to be mentioned in these contexts during lockdown than when it is typical used in the standard English language.

These findings suggest two key things that companies may want to take note of concerning their customers. People in lockdown want openness and probably reassurance, too. With the mistrust for the media, it is obvious that frustration is high therefore customers don't want to feel unclear about their recreational consumer habits.

Hence customers may require extra sources of assurance from the one thing they can control: their spending habits. The extreme frustration associated with delivery as observed on Twitter might reflect the tipping point for many customers who have lost control in other areas of life (e.g. relating to working or social life).

Furthermore, with the omission of excitement for future surprises (explored in insight no. 6) and unpredictability of the future, customers are likely to want reassurance that their orders are on the way for example. E-commerce strategy and communications might shine from empathizing with the lockdown audience who wants clarity, assurity and stability in this volatile world.

Those in the hotel and airline industry may have to work particularly hard in the future to restore the trust in their customers. Companies will have to carefully adapt their marketing, design and communications using behavioural science (e.g. reciprocity principle) to rebuild the toppling wall of consumer confidence.



"@Ocado @bewareblackdog What a load of rubbish @Ocado I am in the same boat and cannot get a delivery at all! Friends who are not vulnerable have been given access before me. When this is over I will never use you again"

6 Looking forward to surprises seems a thing of the past

Prior to lockdown, people tweeted profusely about how they couldn't wait for a number of things. Included in these "can't-wait" contexts were the mentions of future time-frame markers (e.g. March, Feb, Week), and also references to the unexpected/surprises, with people mentioning phrases like "I can't wait to find out".

These words related to discovery and future temporal markers (e.g. March) were 1.85x more likely to be stated pre-lockdown in comparison to in May. The tweet in January from this poor chap exemplifies this point:



"Only 9 more months to find out what surprise the gf has planned for me on my birthday, I need my passport and 5 days off work...I can't wait that long"

It cannot be answered with certainty as to why people are less excited about discovering planned surprises now compared to pre-lockdown however there is one idea to be put forward. Today, the future is uncertain. As we discovered from earlier insights about journalists, people detest uncertainty and the unknown. It then makes sense that people may be less excited for future dates as the future today is aesthetically more foggy.

Importantly, to plan a surprise we need to have knowledge about the future by asking questions such as "is she free on this date?" and "what will

the weather be like in April?". As a result, fewer people are able to plan surprises now than pre-lockdown thus potentially explaining the observed drop in positive sentiment.

While this point seems obvious, it may deserve more thought than at first glance. What are the effects on wellbeing of not having anything to find out in the future? Might people now require immediate gratification (i.e. instant clarity) to plug the absence of long-term surprises? Yes people are buying more online because they cannot shop but might there be an underlying licensing effect mediating consumer decisions during this time (Merritt et al., 2010).

Compared to the same first-quarter last year, Amazon's revenues are up nearly 22%, working out at a stonking \$10,000 every second (The Guardian, 2020). Might the absence of authentic serotonergic future surprises be filled by immediately gratifying substitutes in other places too? The rise of TikTok in a time when we cannot see people for example.

This raises bigger questions about the consumers of today. Are we seeing a movement from slow, built-up experiences (and advertising) to fast, quick-hitters? Substituting reading a book with listening to a quick audio summary?

To conjecture further, might there be a cultural leaning towards more immediately gratifying things in all walks of life resulting in wider production of immediately gratifying marketing/advertising, which over time alters our brains' reward centres to crave more immediately gratifying things. And so the cycle continues... Could this be a closed loop that we see over the next few decades?



Moving forward though, companies must consider what the data here is telling us about how people appear to have less things to find out in the future. Introducing the act of digital discovery may fill the void that customers once couldn't wait for. Dissolve to reveal digital features or count-down email presents/offers might prove fruitful in restoring people's excitement for surprises that were once expressed pre-lockdown.

Again, heightened consumer expectancy for immediate Again, a heightened consumer expectancy for immediate company actions (e.g. delivery) might have aided the observed build-up of frustrations towards delivery and customer service. Reassuring the customer at key touch-points will note doubt be received positively (e.g. friendly update texts/reminders at delivery steps such as: "Out of the warehouse")

Conclusion

By employing a different approach, LAB were able to discover many once invisible insights on how behaviour is shifting throughout lockdown.

We took a chance on whether our data-driven approach using Comparative Linguistic research could help us answer this problem - i.e. discover the unknown on how audience psyche is shifting in lockdown. To our delight, we were successful. All it took was an original design to guide the research which gave insights that shed light onto many areas of marketing and search. People care less about being paid, they want things immediately, they are decluttering the house, they have less surprises to look forward to and they're incredibly cheesed off when it comes to media/policy ambiguity.

Lesson 1 of marketing states that the better you know your audience, the better you can serve them and therefore gain a market lead. Now - with the rise of innovative research such as comparative linguistics - is a time where it's possible for companies to pull ahead in that arms race.

Get in touch if you want to hear how LAB's research-fuelled approach can give you the edge.

Author: Max Wiggins, Insight & Innovation Lead

References

Burke W.W., "A Perspective on the Field of Organization Development and Change: The Zeigarnik Effect", The Journal of Applied Behavioral Science, Vol.47, No.2, (June 2011), pp.143-167.

Aronson, E., Willerman, B., & Floyd, J. (1966). The effect of a pratfall on increasing interpersonal appeal. Psychonomic Science.

Merritt, A., Effron, D. A., Monin, B. (2010). Moral self-licensing: When being good frees us to be bad. Social and Personality Psychology Compass, 4/5, 344-357.

<https://www.theguardian.com/technology/2020/apr/18/amazon-quarterly-results-10000-dollars-a-second>

<https://www.retail-week.com/fashion/analysis-asos-data-reveals-lockdown-sales-recovery-pattern-in-europe/7034591.article?authent=1>

Thank you

**The Creative Human Insights Agency
offering a psychological approach to
creative communication.**

To solve commercial problems

To provoke behaviour change for good causes

To achieve attention, engagement & growth for brand

Our unique process involves:

Design thinking

Psychological audience profiling

Emotional Design

Messaging, Content Strategy and UX/UI

Creative Production

Behavioural Economics

Neuromarketing



hello@verj.co.uk
www.verj.co.uk