THE POST-NORMAL CONSUMER:
NAVIGATING AN UNCERTAIN PRESENT & FUTURE

KEY FINDINGS
FEBRUARY 2021

meredith research solutions
Background & Objectives

» Identify the impact of the coronavirus pandemic on the interests, behaviors, and lives of American women

» Create a consumer segmentation to help advertisers, marketers and content creators better understand and address changing consumer demands across advertising categories

» Model segments onto Meredith’s 180 million consumer database to be available for print and digital activations
Why This Research Is Different

SEGMENTATION

» sophisticated, nuanced view of American women based on a seven-group segmentation

» identification of segment-specific content and advertising strategies

» ability to target and activate consumer segments

PSYCHOLOGICAL PERSPECTIVE

» focus on psychological responses to the pandemic

» consumer differences based on long-term characteristics resulting in stable future predictions

» retained psychologist Dr. Joshua Ackerman (University of Michigan) as a consultant
How You Can Reach & Understand Your Post-Normal Consumers

Strategic consulting based on segmentation study findings

Customized presentations of insights

Custom studies using Meredith research panels

Quantitative Capabilities
- 71,000 members scored and ready to survey
- Can screen for your brand and competitive users to provide tailored insights

Qualitative Capabilities
- Online bulletin boards
- In-depth interviews

Use of Meredith’s Post-Normal Study segment typing tool
- Assign female members of client research panels and customer databases to Post-Normal consumer segments

Cross platform activations to 63 million segmented consumers on Meredith’s corporate database
Range of Consumer Responses to the Pandemic

The number and type of changes made will be a function of...

**PERSONAL CHARACTERISTICS**
- demographics
- psychological makeup
- political orientation
- interests and hobbies

**IMPACT OF THE PANDEMIC**
- physical + mental health
- finances + income loss
- location + region; urban/suburban/rural
- experiences + attitudes about pandemic

---

**NO CHANGES** 31%

**SOME CHANGES** 45%

**MANY SIGNIFICANT CHANGES** 24%
### Whom We Talked To

<table>
<thead>
<tr>
<th>Demographic</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>GEN Z</td>
<td>15%</td>
</tr>
<tr>
<td>MILLENNIALS</td>
<td>36%</td>
</tr>
<tr>
<td>GEN X</td>
<td>23%</td>
</tr>
<tr>
<td>BOOMERS</td>
<td>26%</td>
</tr>
<tr>
<td>PARENTS</td>
<td>42%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Group</th>
<th>Median Household Income</th>
<th>Bachelor's Degree +</th>
<th>Employed</th>
<th>Working From Home</th>
<th>Essential Worker in Household</th>
</tr>
</thead>
<tbody>
<tr>
<td>GEN Z</td>
<td>$81K</td>
<td>54%</td>
<td>64%</td>
<td>49%</td>
<td>52%</td>
</tr>
<tr>
<td>MILLENNIALS</td>
<td></td>
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<tr>
<td>PARENTS</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Condition</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live in an area with a lot of COVID cases</td>
<td>47%</td>
</tr>
<tr>
<td>Personally contracted COVID-19</td>
<td>7%</td>
</tr>
<tr>
<td>Know someone who had the virus</td>
<td>43%</td>
</tr>
<tr>
<td>Worried about contracting COVID-19</td>
<td>35%</td>
</tr>
<tr>
<td>Household lost income</td>
<td>34%</td>
</tr>
</tbody>
</table>
What We Need to Know to Better Understand the Future

1. How do women differ in their response to the pandemic?
2. What are perceptions, attitudes & behaviors about the pandemic?
3. How has physical and mental health been affected?
4. What do consumers want from brands & advertisers?
POST-NORMAL CONSUMER SEGMENTATION
Segmentation Overview

US WOMEN AGES 18-69 (80.6 M)

- YOUNG & VULNERABLE (28)
- RESTLESS MILLENNIALS (31)
- CONSERVATIVE VIRUS SKEPTICS (45)
- FINANCIALLY CHALLENGED (48)
- DIVERSE & AT-RISK (50)
- SUCCESSFUL & CONCERNED (53)
- HEALTHY & OPTIMISTIC (56)

- 10.6M (13%)
- 14.1M (18%)
- 11.2M (14%)
- 10.0M (12%)
- 12.9M (16%)
- 9.0M (11%)
- 12.8M (16%)
YOUNG & VULNERABLE
AGE 28

ABOVE AVERAGE FOR BEING
urban
single
politically active

WILLINGNESS TO MAKE LIFESTYLE CHANGES
will make some changes, but not others

INTERESTS
social issues
pets
celebs & entertainment
style & fashion

HEALTH
mental & physical health have declined during the pandemic

greatly fears contracting the virus

anxious | liberal
empathetic | introverted
environmentally-conscious
open-minded | sensitive
impulsive | impatient

PANDEMIC SPENDING
tried and will keep using new brands

WANTS ADVERTISING THAT
shows a mix of uplifting and serious content

PANDEMIC SPENDING
bought things to feel better; will shop online more

MEREDITH AFFINITIES
People
Entertainment Weekly
Allrecipes
ABOVE AVERAGE FOR BEING urban kids in household career-oriented

INTERESTS
DIY home projects parenting & family celebrities clothing & fashion

WILLINGNESS TO MAKE LIFESTYLE CHANGES will make some changes, but not others

HEALTH mental & physical health have declined since pandemic began

WANTS TO GET BACK TO active lifestyle
impatient | adventurous impulsive | leader dramatic | disorganized lazy | deep

PANDEMIC SPENDING tried new brands, but prefers old favorites

WANTS ADVERTISING THAT is uplifting, does not mention the pandemic

PANDEMIC SPENDING will shop online more

RESTLESS MILLENNIAL
AGE 31

MEREDITH AFFINITIES
InStyle People Parents Allrecipes
ABOVE AVERAGE FOR BEING
rural
Evangelical
white

INTERESTS
cooking
healthy living
gardening

WILLINGNESS TO MAKE LIFESTYLE CHANGES
will make few or no changes

HEALTH
mental & physical
health has remained
stable

not concerned about the virus

CONSERVATIVE
VIRUS SKEPTIC
AGE 45

conservative | happy
fun-loving | opinionated
religious | healthy
active

WANTS ADVERTISING THAT
focuses on products, not the pandemic

PANDEMIC SPENDING
wants to purchase her usual brands

PANDEMIC SPENDING
home improvement
clothing

MEREDITH AFFINITIES
BH&G
Real Simple
Allrecipes
ABOVE AVERAGE FOR BEING
rural
northeast
republican

INTERESTS
cooking
health conditions
home organizing

WILLINGNESS TO MAKE LIFESTYLE CHANGES
will make some changes

HEALTH
mental health has declined since the pandemic began

FINANCIALLY CHALLENGED
AGE 48

experienced a job loss or income loss

anxious | organized
introverted | impatient
conservative | bossy
obsessive | pessimistic

PANDEMIC SPENDING
wants to purchase her usual brands

PANDEMIC SPENDING
food & cooking
home design & décor
home cleaning

WANTS ADVERTISING THAT
focuses on products, not the pandemic

MEREDITH AFFINITIES
People
BH&G
Real Simple
Allrecipes
**DIVERSE & AT-RISK**

**AGE 50**

**INTERESTS**
- racial justice
- personal care
- food & cooking
- health conditions

**WILLINGNESS TO MAKE LIFESTYLE CHANGES**
- will make many significant changes

**HEALTH**
- mental & physical health have declined during the pandemic

**psychologically feels very close to the virus; at-risk due to underlying conditions (self or family)**

**empathetic | generous | calm | balanced | spiritual | religious | liberal**

**PANDEMIC SPENDING**
- wants to purchase her usual brands
- will maintain or increase online shopping

**WANTS ADVERTISING THAT**
- focuses on how we can emerge even stronger after the pandemic

**MEREDITH AFFINITIES**
- People
- BH&G
- Allrecipes
- Southern Living

**ABOVE AVERAGE FOR BEING**
- urban
- non-white
- south
SUCCESSFUL & CONCERNED
AGE 53

feels her personal efforts make a difference in battling the pandemic

intelligent | detail-oriented
open-minded | organized
environmentally-conscious
liberal | balanced

ABOVE AVERAGE FOR BEING
affluent
retired
democrat

INTERESTS
tavel
health & wellness
social issues

WILLINGNESS TO MAKE LIFESTYLE CHANGES
will make some changes, not others

HEALTH
physically & mentally healthy

WANTS BRANDS TO implement safety measures & protect employees

PANDEMIC SPENDING
wants to purchase her usual brands

PANDEMIC SPENDING
will shop online less once pandemic ends

MEREDITH AFFINITIES
People
BH&G
Allrecipes
Travel + Leisure
HEALTHY & OPTIMISTIC
AGE 56

not worried about the virus, but takes action to prevent the spread

happy | easy-going
optimistic | balanced
generous | calm
conservative

ABOVE AVERAGE FOR BEING
retired
religious
republican

INTERESTS
travel
health & wellness
food & cooking
personal care

WILLINGNESS TO MAKE LIFESTYLE CHANGES
will make some changes, not others

HEALTH
physically & mentally healthy

PANDEMIC SPENDING
wants to purchase her usual brands

WANTS BRANDS TO focus on product quality & customer needs

MEREDITH AFFINITIES
People
BH&G
Allrecipes
Travel + Leisure

PANDEMIC SPENDING
food & cooking
DIY home projects
gardening
<table>
<thead>
<tr>
<th>NO CHANGES</th>
<th>MANY SIGNIFICANT CHANGES</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONSERVATIVE VIRUS SKEPTIC (45)</td>
<td>FINANCIALLY CHALLENGED (48)</td>
</tr>
<tr>
<td>HEALTHY &amp; OPTIMISTIC (56)</td>
<td>YOUNG &amp; VULNERABLE (28)</td>
</tr>
<tr>
<td>RESTLESS MILLENNIAL (31)</td>
<td>DIVERSE &amp; AT-RISK (50)</td>
</tr>
<tr>
<td>SUCCESSFUL &amp; CONCERNED (53)</td>
<td></td>
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<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>little impact from the pandemic</td>
<td>anxious; struggling mentally</td>
</tr>
<tr>
<td>not worried about virus</td>
<td>underlying conditions</td>
</tr>
<tr>
<td>doesn’t feel actions make a difference</td>
<td></td>
</tr>
<tr>
<td>affluent, educated, healthy</td>
<td></td>
</tr>
<tr>
<td>lost income</td>
<td></td>
</tr>
<tr>
<td>healthy</td>
<td></td>
</tr>
<tr>
<td>little financial strain</td>
<td>worried about spreading virus</td>
</tr>
<tr>
<td>not vulnerable to the disease</td>
<td>financial setbacks</td>
</tr>
<tr>
<td>not impacted, but concerned about virus</td>
<td></td>
</tr>
<tr>
<td>susceptible to virus</td>
<td></td>
</tr>
<tr>
<td>more concerned about economy</td>
<td></td>
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<tr>
<td>believes pandemic is part of God’s plan</td>
<td></td>
</tr>
<tr>
<td>misses busy lifestyle</td>
<td></td>
</tr>
<tr>
<td>believes her actions make a difference</td>
<td></td>
</tr>
<tr>
<td>struggling mentally</td>
<td></td>
</tr>
<tr>
<td>feels closest to pandemic</td>
<td></td>
</tr>
</tbody>
</table>
HEALTHY & OPTIMISTIC
13.0 Million (21%)

YOUNG & VULNERABLE
12.5 Million (20%)

CONSERVATIVE VIRUS SKEPTICS
9.2 Million (15%)

SUCCESSFUL & CONCERNED
8.8 Million (14%)

FINANCIALLY CHALLENGED
7.4 Million (12%)

DIVERSE & AT-RISK
6.3 Million (10%)

RESTLESS MILLENNIALS
6.2 Million (10%)

QUESTIONS? reach out to postnormalstudy@meredith.com

*Women 18-69 and meet income requirements; available for activations beginning in February 2021
WHAT ARE WOMEN’S PERCEPTIONS, ATTITUDES & BEHAVIORS ABOUT THE PANDEMIC?
Half of women feel psychologically close to the pandemic

49% say the coronavirus pandemic feels close to them

**DIVERSE & AT-RISK**

- 74% feel close to the pandemic (index 150)
- 79% think more favorably of brands with pandemic-focused ads (index 174)

**PSYCHOLOGICAL PERSPECTIVE**

Construal level theory says that people who feel closer to an event pay attention to different types of information (concrete vs. abstract features) and are persuaded by different messaging.

**CONSERVATIVE VIRUS SKEPTICS**

- 10% feel close to the pandemic (index 20)
- 7% think more favorably of brands with pandemic-focused ads (index 14)

**BRAND IMPLICATIONS**

Messaging focused on specific product features and benefits would resonate most with those who are closer to the pandemic.

Those who have not been impacted are more likely to respond to broader messages, including product desirability.
Women’s experiences during this time impact future behavior

**those who feel psychologically close to the pandemic are more likely to...**

1. make changes to their lifestyle post-pandemic
   - (31% vs. 17% of those who don’t feel close to pandemic)

2. continue to buy new brands + products they tried during the pandemic
   - (63% vs. 52%)

3. spend money to make their time at home more enjoyable
   - (56% vs. 45%)

4. feel living an active, healthy lifestyle has become more important now
   - (52% vs. 39%)
While most women wear face masks, some question their effectiveness and the need to be mandatory

67%
believe wearing a face mask is effective in preventing the spread of coronavirus

72%
believe wearing a face mask should be mandatory when social distancing is not possible

By now, it has been shown that [masks] make a difference. The mask protects others from you; I want someone to exhibit that same concern for me. Show respect and care for others. This virus is serious.

— Dawn G., 61

Feelings about masks are determined by what they’re being told (effectiveness) or the direct experience of wearing one (comfort). Beyond that, psychologically, masks represent a social symbol (belonging to a social group) and reflect a person’s motivations.

The pro-mask group sees masks as a means to help others, whereas anti-maskers see them through a self-focused lens. These differences are exaggerated for those who feel their social group is more central to their identity.
Social listening: what women are saying about masks
The pandemic has encouraged women to save for unexpected circumstances

African American and Hispanic women were particularly impacted financially

<table>
<thead>
<tr>
<th>SAVINGS &amp; FINANCIAL UNCERTAINTY</th>
<th>52%</th>
<th>30%</th>
<th>19%</th>
</tr>
</thead>
<tbody>
<tr>
<td>The pandemic made me realize I should save more for unexpected circumstances</td>
<td>highest among…</td>
<td>GEN Z, MILLENNIALS, AFRICAN AMERICAN WOMEN</td>
<td></td>
</tr>
<tr>
<td>Financial uncertainty created by the virus influences most of my purchase decisions</td>
<td>54% saved money during the pandemic</td>
<td>21% used up a lot of savings to stay afloat</td>
<td>34% household experienced job loss, reduced hours, or salary cut</td>
</tr>
<tr>
<td>I expect someone in my household will lose income or benefits in the next 6 months</td>
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<td></td>
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</tbody>
</table>

A2. How much do you agree or disagree with the following statement? [% agree strongly/agree]

A4. Which, if any, of the following did you experience as a result of the coronavirus pandemic?
For many women, the pandemic has made them reevaluate priorities

56% The pandemic has made me realize what is really important in my life

39% I have made changes to the way I live that will last long after the coronavirus pandemic is over

REALIZATIONS DURING THE PANDEMIC

I can spend less on things I don't need and still be happy (52%)

I have enjoyed a slower pace of life (42%)

The pandemic has made me want to live close to my family (38%)

The pandemic has made me reconsider the location where I live (18%)
Women are focusing even more on interpersonal connection

Like many of us, I've come to value my relationships more... I'm less interested in accumulating things and more interested in doing things.

— Cathy W., 63

**Psychological Perspective**

When faced with a threat, women closer to the pandemic will respond with avoidant reactions, slowing down and reevaluating priorities.

There is a fundamental shift in motives from personal achievements and status to relationships and connecting with others.

**Brand Implications**

Brands that reach women most impacted by the pandemic should emphasize connection with others and dependability over personal success and status.
Top values and priorities that are more important since the pandemic began...

- Having close family relationships: 48%
- Leading an active, healthy lifestyle: 45%
- Being dependable and trustworthy for family and friends: 42%
- Continuing to learn and grow: 41%
- Treating every person in the world equally and justly: 39%
- Understanding and accepting people who are different from you: 38%
- Having work-life balance: 38%
- Being independent and free to determine your own actions: 37%
- Promoting racial justice and racial equality: 35%
- Being free to think new ideas / be creative / develop new skills: 33%
- Having a home I am proud of: 33%
- Trying new things: 33%
HOW HAS PHYSICAL & MENTAL HEALTH BEEN AFFECTED?
Women saw a greater decline in mental vs. physical health

14% felt their physical health had declined during the pandemic
39% felt their mental health had declined during the pandemic

CHANGES IN PHYSICAL HEALTH
- 14% improved
- 7% stayed the same
- 79% declined

CHANGES IN MENTAL HEALTH
- 39% improved
- 56% stayed the same
- 5% declined

YOUNG & VULNERABLE
- 23% report a decline in physical health
- 58% report a decline in mental health

L1. How would you rate your physical health before and during the coronavirus pandemic?
L2. How would you rate your mental health and well-being before and during the coronavirus pandemic?
About half experienced depression symptoms in the past two weeks
young, single, urban women were most affected

47% felt little interest or pleasure in doing things

49% felt down, depressed, or hopeless

16% are considered depressed, according to CDC criteria
WHAT DO WOMEN WANT FROM BRANDS & ADVERTISERS?
Consumers want brands to focus on both their needs as well as brand quality

94%
It is important to me for brands and companies to continue to focus on product quality

94%
I appreciate brands and companies who are listening to and acting on consumer needs

strongly agree: 53%

strongly agree: 48%
Consumers are split on advertising focused specifically on the pandemic

49% do not want to see advertising focused on the pandemic

higher among...
- RURAL 63%
- REPUBLICAN 69%
- GEN Z 51%
- MILLENNIALS 50%
- MARRIED 52%
- WHITE 57%
- MIDWEST 58%
- NON-SOUTH 52%
- ESSENTIAL WORKERS 54%

CONSERVATIVE VIRUS SKEPTICS
- 94% agree
- index 191

DIVERSE & AT-RISK
- 9% agree
- index 18
Women want a mix of advertising messages

**highest among...**

- **67%** want brands to provide an appropriate mix of uplifting and serious content
- **24%** want brands to offer a welcome uplifting break from the seriousness of the virus
- **8%** want brands to be toned down to reflect the seriousness of the pandemic

**PSYCHOLOGICAL PERSPECTIVE**

For people who want uplifting messages, the positive emotion connected to them is also associated with wanting easy-to-understand information. Positive emotion leads people to expand their scope of attention to information but reduce attention to specific details.

*With uplifting content, the ideal pairing would be a message with one central theme associated with a positive goal for consumers, rather than messages that include different things to consider or multiple steps to achieve a goal.*
Advertising should be positive and forward-focused and brands must continue to focus on product quality.

78% appreciate advertising that focuses on how we are all united as Americans.

68% are interested in advertising that shows how we all can emerge from pandemic even stronger.

66% wish brands would just talk about the benefits of their products rather than the pandemic.

Agreement with this statement varies greatly by segment:

- CONSERVATIVE VIRUS SKEPTIC: index 146
- FINANCIALLY CHALLENGED: index 124
- HEALTHY & OPTIMISTIC: index 115
- YOUNG & VULNERABLE: index 72
- SUCCESSFUL & CONCERNED: index 68
- DIVERSE & AT-RISK: index 56

B1. How much do you agree or disagree with each of the following statements? [agree strongly/agree somewhat]
Most women will continue to shop online post-pandemic

once the pandemic has ended, I will be shopping online...

<table>
<thead>
<tr>
<th>more often</th>
<th>same amount</th>
<th>less often</th>
</tr>
</thead>
<tbody>
<tr>
<td>22%</td>
<td>66%</td>
<td>12%</td>
</tr>
</tbody>
</table>

highest among...

- YOUNG & VULNERABLE index 137
- DIVERSE & AT-RISK index 131
- RESTLESS MILLENNIALS index 121
Women miss favorite brands that they can’t find

77% can’t wait for their usual brands to be more readily available than they are right now
But many have been happy with the new brands they have discovered.

I have purchased new brands or products since the pandemic began...

**and** will continue to purchase them after the pandemic is behind us

**58%**

**but** will be happy to return to my tried-and-true favorites after the pandemic is behind us

**49%**

**highest among…**

**YOUNG & VULNERABLE**

index **131**

**MILLENNIALS** **61%**

**GEN Z** **67%**

**CONSERVATIVE VIRUS SKEPTICS**

skeptics, who tend to be less adaptable, are least likely to have tried new brands or products

**continue to purchase:** index **66**

**return to tried-and-true:** index **74**
Household staples lead the list of brands they will return to, while pandemic needs add new favorites they will keep

49% will go back to tried-and-true favorites
among those returning to their most-loved brands...

<table>
<thead>
<tr>
<th>TOP CATEGORIES</th>
<th>43%</th>
</tr>
</thead>
<tbody>
<tr>
<td>paper products</td>
<td></td>
</tr>
<tr>
<td>cleaning products</td>
<td>40%</td>
</tr>
<tr>
<td>food + non-alcoholic beverages</td>
<td>30%</td>
</tr>
<tr>
<td>personal care</td>
<td>24%</td>
</tr>
<tr>
<td>beauty</td>
<td>16%</td>
</tr>
</tbody>
</table>

58% will continue to purchase
among those continuing to purchase new brands...

<table>
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<th></th>
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<td>personal care</td>
<td>43%</td>
</tr>
<tr>
<td>beauty</td>
<td>32%</td>
</tr>
<tr>
<td>over-the-counter remedies</td>
<td>27%</td>
</tr>
<tr>
<td>clothing and accessories</td>
<td>25%</td>
</tr>
<tr>
<td>streaming services</td>
<td>25%</td>
</tr>
<tr>
<td>alcoholic beverages</td>
<td>20%</td>
</tr>
<tr>
<td>pet food and supplies</td>
<td>19%</td>
</tr>
</tbody>
</table>
RESEARCH TEAM
LYNN BALIK
ANDY BORINSTEIN
BRITTA CLEVELAND
MARIA DESIO
EMILY FLEISHMAN
JOEL KAJI
CYNTHIA WALSH
DR. JOSHUA ACKERMAN
(UNIVERSITY OF MICHIGAN)

QUESTIONS? contact
postnormalstudy@meredith.com
THE POST-NORMAL CONSUMER:
NAVIGATING AN UNCERTAIN PRESENT & FUTURE

KEY FINDINGS
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