

swift

**COVID-19**

# Global Social Conversation Report

United States 

United Kingdom 

China 

Italy 

Germany 

27.05.2020

**For the first time in modern history, we are globally experiencing a shared threat to our existence.**

**For the first time in modern history, we have a common “language” to express our shared experiences.**

# The language of social media



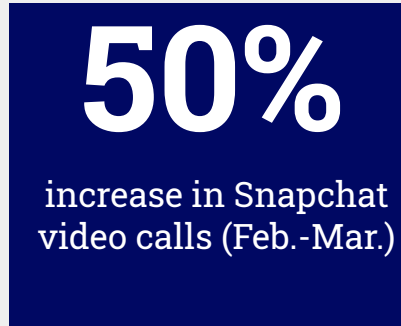
Social listening provides a barometer for human emotions and cultural conversations, at scale.



# Dramatic increase in global social media usage



Source: Facebook



Source: Snapchat / TechCrunch



Source: Facebook/Hootsuite

## METHODOLOGY

### Markets

UK  | US  | Italy  | Germany  | China 

Markets reflect WPP prioritization and representation of being at different stages of the pandemic.

### WPP Global network activated

The Swift team collaborated with offices in each key market to collect a unified data set and representative examples of social intelligence.

### Tools

**Netbase | Crimson Hexagon | Spreadfast | Google & Pinterest search trends | GWI**

**Date Range: Jan. 1, 2020 - April 30, 2020** *(unless otherwise noted)*

Quantified trends were based on Twitter conversation volume because it is the most open platform for social listening. Queries were developed in English, then translated to German and Italian or, in the case of the UK, adjusted to reflect local vernacular. Because social listening capabilities are restricted in China, insights are limited to what is available from platforms and secondary research.

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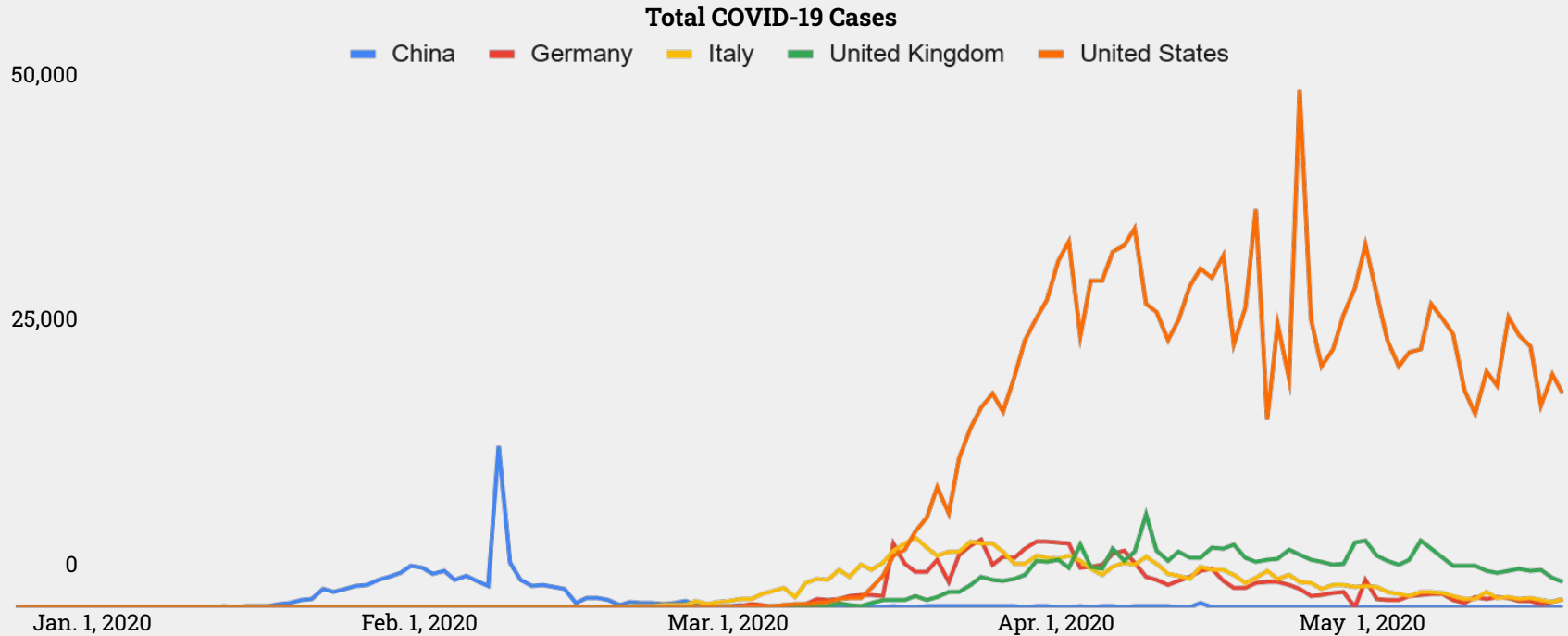
# Lockdown level set



# Within two months of the outbreak, much of the world was in lockdown.

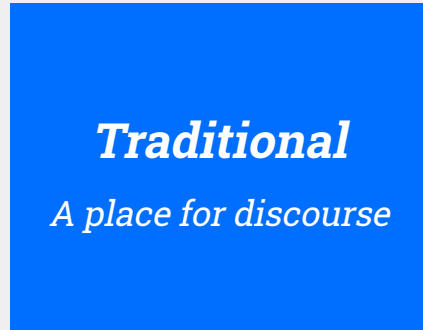


# But declining cases paved the way for reopenings in May.



# As we emerge from lockdown, the world of social has been reframed.

FROM



TO



## Social isn't a platform. It's a behavior.

As behaviors continue to be impacted by the virus - so too will consumers' appetites to push the boundaries of both utility and entertainment on social.

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# Global trends

This report unpacks four key themes that represent the largest volume of global social conversation

**COPING**

**GETTING  
REAL**

**NAVIGATING  
NEW  
RESPONSIBILITIES**

**QUARANTINE  
CULTURE**

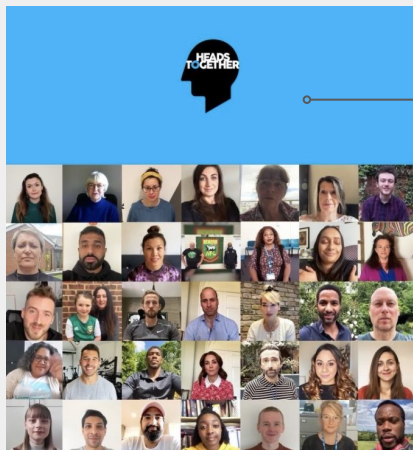


Coping:

As noted in WT's *COVID-19 Anxiety Index* report, worries are at their highest point since 2003. In the face of new challenges, people are going to social to expand their arsenals of self-care strategies like never before.

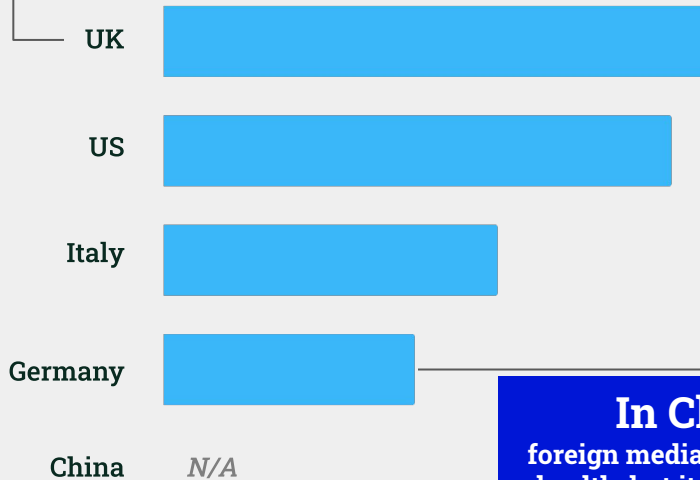
## Coping

Despite the need for help, openness to mental healthcare is not universal.



**US & UK**  
have been most receptive to using social for mental health help

Google Searches for Anxiety  
(last 90 days)



**In Germany**  
mental health was cited as an argument for easing the lockdown



**In China**  
foreign media cover mental health, but it is not widely discussed on social

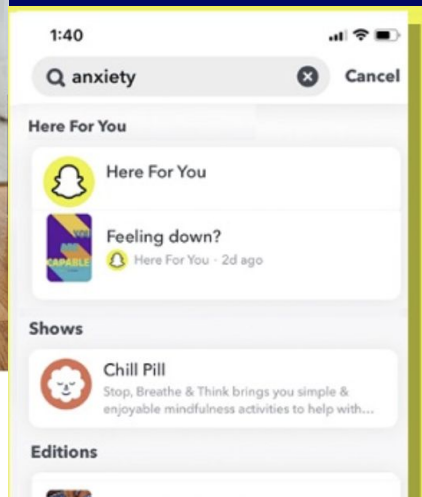
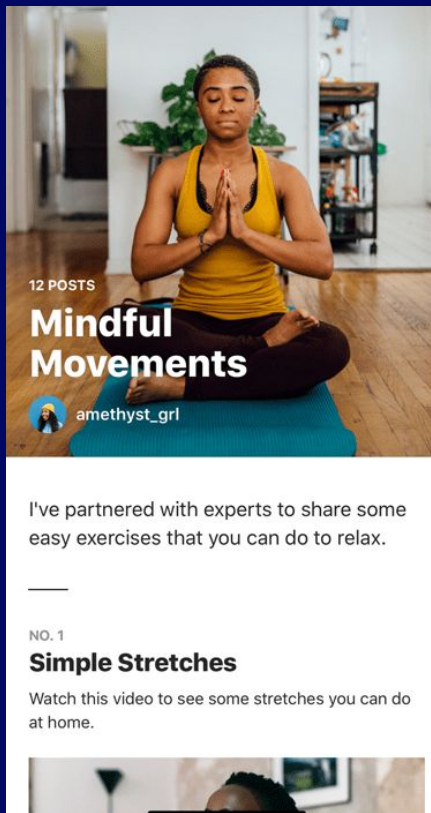
Source: Google Search Trends



## Coping

# Platforms are now also a source of self-care solutions.

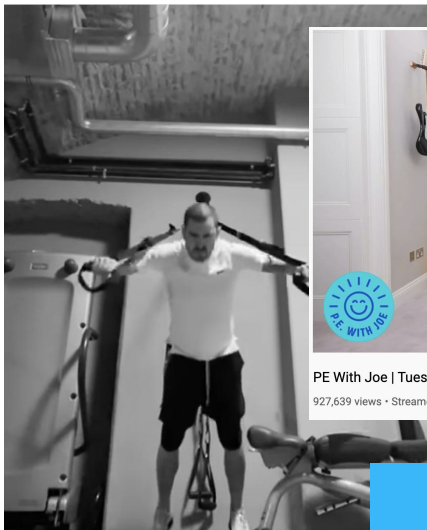
Conversation about mental health spiked in each market except China as stay at home orders went into effect. In response, platforms like Instagram and Snapchat rolled out new features to make platforms a source of self-care guidance.



## Coping

# Social inspired us to get moving. Now it's our fuel.

bonuccileo19 •  
Turin, Italy



PE With Joe | Tuesday 28th April

927,639 views · Streamed live on Apr 28, 2020

28K 540 SHARE SAVE

**Italy, UK & US**  
lean on influencers. HIIT has been popular in the UK, while Italians & Americans follow trainers & pro athletes



Liked by laurabarriales and thousands of others

bonuccileo19 Work hard, play hard 🍷  
#LB19 #DistantiMaUniti #FinoAllaFine

David Hartmann  
@dvd\_hrtmnn

Und weiter geht's - #popupbikelanen  
jetzt auch am Tempelhofer Ufer  
damit ab sofort beidseitig sich  
Und das Beste: das bleibt dauerhaft!  
#verkehrswende

Translated from German by Google

And it goes on - #popupbikelanen are now also  
being created on the Tempelhofer Ufer. Canal  
riverside streets can now be safely cycled on bot  
sides. And the best thing: it stays permanent!  
#verkehrswende



## Germany & China

embraced more traditional exercise.  
Germany favors cycling, while China has  
seen treadmill sales nearly double.

最终还是一个人123  
4-29 22:22 来自 OPPO 蓝光西... 已编辑  
Day9, 要努力攒钱买划船机丫



## Coping

# Social enables analog connections when digital just won't do.

Though all markets still see elevated use of messaging apps, people recognize real-life connection can be the best form of self-care.

**In Italy**, people used WhatsApp to organize “balcony editions” of the game bingo with their neighbors.

**In the UK**, people hosted VE day block parties.

**In the US**, people used Facebook to coordinate drive-by birthday parades and graduation celebrations.

**In Germany**, #Nachbarschaftschallenge connected people who needed help in real life with simple things like grocery shopping.

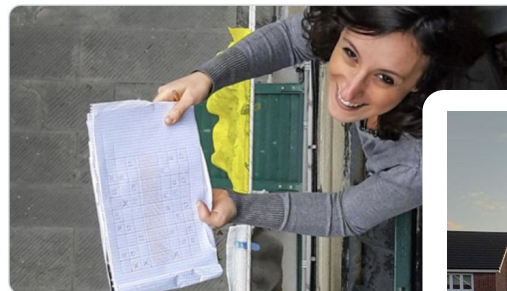
Source: GWI || Netbase



Genova Online  
@GenovaOnline

Numbers, microphones, balconies. It is the open bingo that depopulates the Carmine [dlvr.it/RV3Pj3](https://dlvr.it/RV3Pj3)

[Translate Tweet](#)



**51%**  
of Italians are spending more time on messaging apps because of coronavirus




Liked by hannahspannahcb and others

4\_kids\_and\_a\_husband #veday #stayathome #streetparty ... 🙌🙌🙌🙌💖💖💖💖💖

# Brand Implications

Coping mechanisms in social media come in many forms; from mental, to physical, to IRL connections. Consider the range and brand relevance when incorporating content that supports self care.



A close-up, slightly angled portrait of a woman's face. She has dark, curly hair, brown eyes, and a mole on her left cheek. Her expression is neutral and thoughtful. The lighting is soft, highlighting her skin texture and freckles.

## Getting Real

Consumers expect brands to put their money where their mouth is, and for social to be the most authentic, stripped-down home for the brand.

## Getting Real

# “Thank you” is not enough.

In the UK, social conversation shows consumers quickly tire of platitudes. At the start of the pandemic, people used #ClapForCarers to coordinate support for healthcare and essential workers. That quickly evolved into tangible action and demands for permanent change.



#ClapForCarers  
150,000+ uses



£33,000,000  
raised by Capt.  
Tom Moore



David Ward  
@David\_J\_Ward

Replying to @TheHouseLive and @politicshome

The absurd salaries of NHS managers should be cut to pay Nurses more.



QUARANT-CRiNq  
@4iamstardust

Checkmate, Brits! We win by doing more than clapping for our overworked, underpaid nurses.

7.4K mentions of  
NHS nurses pay



“Thank You”

Tangible action

Demand for permanent change

Getting Real

# Schmaltzy messaging from (mostly) American brands is getting old.

**A U.S. based** YouTuber assembled a montage of clips illustrating similarities in brand messaging and it went viral (1.5M views), with many noting that “in it together” messaging feels disingenuous.

**In Italy**, a popular late night show put up an Instagram poll allowing people to vote on the silliest part of lockdown that tired them out the most, and “emotional commercials” was one of the options.



1.5M views

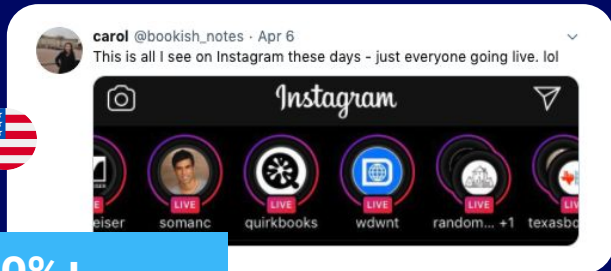
## Getting Real

# Boom in lo-fi social suggests desire for self-acceptance.

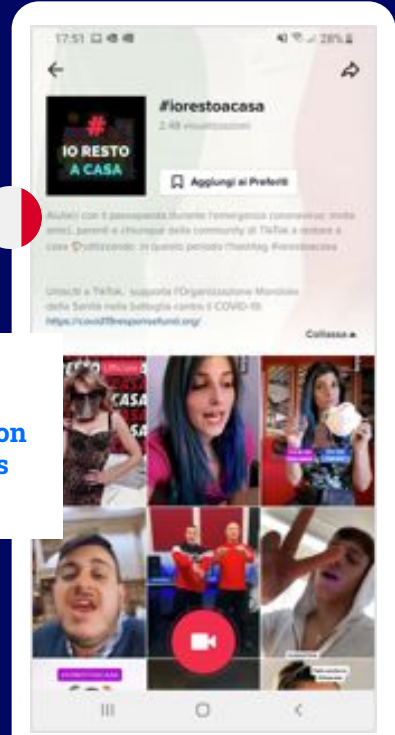
IG Live and TikTok were already more stripped down and less polished than other platforms. Both have seen monumental growth in all regions throughout the pandemic.

**In the U.S.**, average time spent per visitor on TikTok app was 858 minutes in March, a 26% increase since January.

**For the UK**, TikTok has seen the most growth of any of the platforms with 59% mentions increase between February and March.



**70%+**  
Increase of IG Live usage  
in the U.S. (Mar. vs Apr.)



**2.4B views**  
Of #iorestoacasa posts on  
TikTok in just 8 weeks  
in Italy



Getting Real

# People have pared back the need for polished perfection.

The combination of increased time at home and need for self care has people ditching makeup and prioritizing skincare.

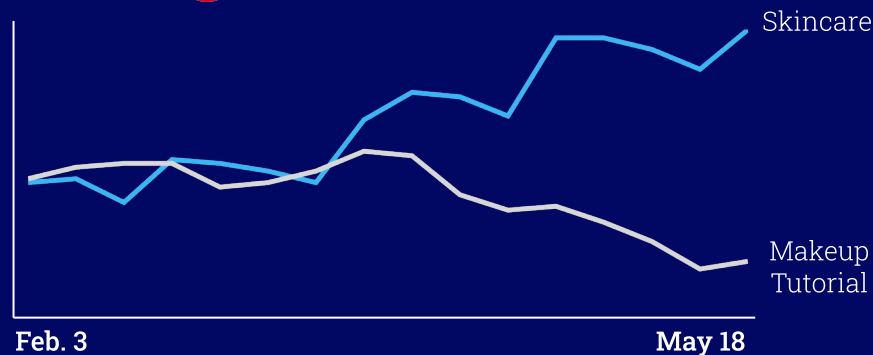
**In the U.S.**, Pinterest searches for skincare routines accelerated while makeup tutorials decreased.

**In Europe**, e-com marketplace Zalando reported a 300% year-over-year jump in March skincare product sales.

Beauty brands like L'Oreal are offering AR experiences to support online shopping.



## Pinterest Searches



Source: Pinterest || McKinsey

# Brand Implications

The desire for being real, from brand actions to aesthetics, has been on the rise for years, but has now hit critical mass. Embrace the under polished and speak with candor on social.



## Navigating Normal Responsibilities:

In both reopened and restricted regions, the impact of COVID continues to change how people navigate work, education, and familial responsibilities.

## Navigating Normal Responsibilities

# Even as offices open, work is not routine.

### Commuting Concerns

**In the UK** where people are just recently going back to work, commuting is the top topic of conversation. People are hyper aware of crowds on trains, not zoning out on their phones.

### In the office

**In China**, workers have been back in the office the longest but still discuss the importance of personal protection.

### What office?

**In the U.S.** though most will return to the office, remote working may be permanent for many. This could make crowded freeways a thing of the past and reshape downtown business districts.

优雅洁癖

时隔多年只看微博不发的我，却因为要复工没有口罩而焦虑。网上约不到口罩，线上线下都没有。钟院说卷土重来可能要6月结束，那口罩咋办？谁给条明路

02月15日 22:37 来自 iPhone客户端

*"I feel stressed due to the lack of masks...I cannot find them either online or offline...looks like this situation will last until June. What can I do without masks?"*

62%

of discussion of returning to work in China was about personal protection or masks

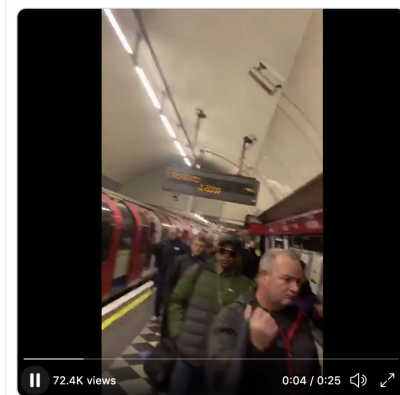
### *Manhattan Faces a Reckoning if Working From Home Becomes the Norm*

Even after the crisis eases, companies may let workers stay home. That would affect an entire ecosystem, from transit to restaurants to shops. Not to mention the tax base.



Gemma Collins  
@missgemcollins

Huh 🤔 just been sent this of holborn station today



72.4K views

0:04 / 0:25

## Navigating Normal Responsibilities

# Productivity tools blur lines between work and social.

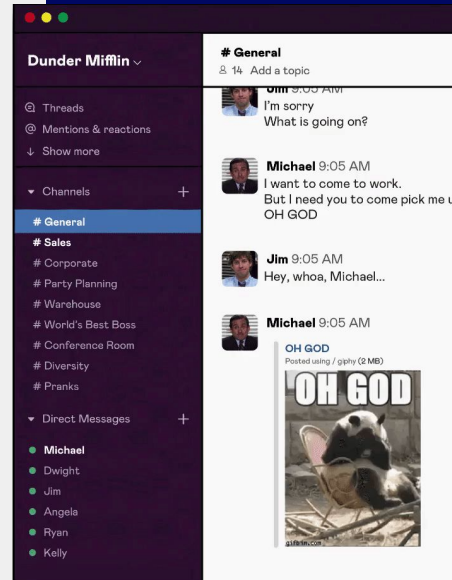
With many Americans still working remotely, tools like Slack and Zoom have become social connectors. Art collective MSCHF leaned on that insight to recreate episodes of the popular sitcom *The Office* on Slack, while Zoom has become a tool for socializing and fodder for meme culture.



## Zoom Meeting

Audio only

With video



## Navigating Normal Responsibilities

# Changing school exposed new anxieties.



**shonda rhimes**   
@shondarhimes

97,000  
retweets



Been homeschooling a 6-year old and 8-year old for one hour and 11 minutes. Teachers deserve to make a billion dollars a year. Or a week.



Schools Closed



**#noncisiamao**  
used to highlight gender inequality  
in Italy's reopening plans

2x  
increase in  
conversation as  
schools reopened &  
parents worried about  
kids' health

Schools Reopened



## Navigating Normal Responsibilities

# Phased reopening has schedules in flux.

### Changed commute times

A phased approach to reopening has people commuting at different times or on different days.

### Weakened Weekends

For those working from home, weekends feel similar to weekdays. On social, people have noted that they are forgetting to make weekend plans.

### New Rituals and Routines

Where one may have ended a work day with happy hour drinks at a bar, it is now replaced by taking a walk around their neighborhood.

Please know that if you post a pic of your color coded, homeschooling schedule right now that this will be the response from every single human but your mother

@MAGTYERINGM22

805,000

mentions of routines & schedules (Mar-May)



Mystic Corrie  
@alexandermomma




I don't want to mom today. I'm tired of living Groundhogs day. I want to go to the park and the zoo and library. I want to enjoy my time with my kid while he's home but it's hard when we do the same things every day. 😞

# Brand Implications

Rethink existing consumer journeys and paths to purchase to align with changes in daily routine.





Quarantine Culture:

Stay at home orders changed our lifestyles - from entertainment to e-commerce - and have made way for future opportunities.

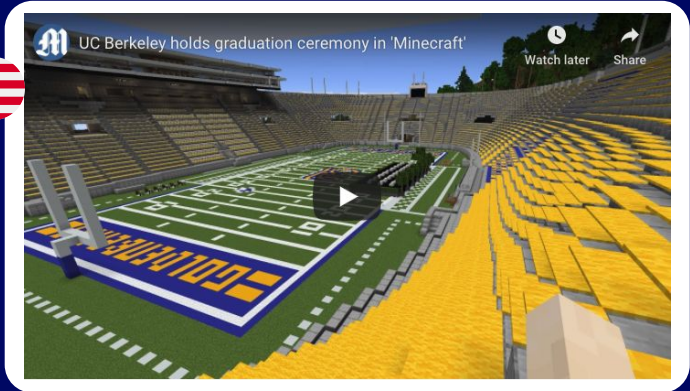
## Quarantine Culture

# Gaming cements its role as a place for community.

Gaming communities have supported each other during self-isolation. Players of Animal Crossing and Minecraft created virtual graduation ceremonies in these games.

eSports have seen a variety of cross-industry partnerships. NBA 2K, the first esports league operated by a professional sports league, will partner with ESPN to broadcast the entire season on ESPN 2.

Non-gaming brands, such as Nike and Kaiser Permanente, have entered the eSports industry to promote mental and physical health for gamers.



**40%**  
more mentions of  
video games  
(Mar. vs Feb.)

## Quarantine Culture

# Social joins streaming as a new alternative to the cinema

**In China**, a production company released an entire film on TikTok when cinemas were closed. *Lost in Russia* saw 600-million views in three days. According to a Weibo survey, most believe the movie theater experience can't be replaced but 1 in 5 say both are acceptable.

**In the U.S.**, *Trolls World Tour* was made available streaming platforms for rent - pulling in \$100 million since its release on April 10.

**\$100,000,000**  
in streaming rental revenue since  
April 10 release



**600,000,000**  
views in three days



## Quarantine Culture

# Talk of travel provides distraction and hope for the future

In all markets, people continue to delay making vacation plans, but travel is one of the things they miss most.

In English language conversation, people talking about their post-pandemic plans mentioned travel more than any other topic except hosting parties with friends and family.

When people feel safe to travel, 20-40% say they will prioritize short trips close to home over far-flung exotic destinations.



Sil  
@mmorphine\_

Post quarantena voglio viaggiare, viaggiare e ancora viaggiare. Non so con quali soldi, ma ve giuro che un modo lo trovo.

[Translate Tweet](#)

*"Post Quarantine I want to travel, travel and travel again. I don't know what money, but I swear to you that I find a way."*



本音糖YIYI

我现在满脑子都是旅游计划

满脑子都是大理沙溪古镇和香格里拉 我真的太期待这个夏天了

我希望学校能宣布这学期不开学 我想早点和我宝贝去旅游@我的闺蜜人睡醒了



今天03:28

*"I keep thinking about the old town in Dali and Shangri-La. I am so looking forward to summer. I hope that our school won't open and I really want to travel"*

2 in 5

people in China plan to do more staycations, compared to about 1 in 5 for other markets

## Quarantine Culture

# Risk free, virtual travel provides those in lockdown an escape without leaving home.

### Virtual Travel

With virtual reality and 360-degree videography, brands and travel industry professionals created virtual tours to attract global tourists.

Re-creations of canceled vacations have even gone viral in America. One mom got creative with her TV, an office chair and her cell phone when she had to cancel a Disney vacation.

Experience the national parks in 360°  
Get outside, at home

EXPLORE Yosemite National Park

EXPLORE Mesa Verde National Park

EXPLORE Yellowstone National Park

EXPLORE The Grand Canyon

### Giant's Causeway, Northern Ireland >

There are several sweeping viewpoints to take in at Giant's Causeway, but while our doors are closed, experience the different scenes of the County Antrim coast from the comfort of your sofa. We've got a few virtual tours of this geological marvel, including one of the iconic basalt columns that make up Giant's Causeway.

Take a virtual tour of where giants walked

See the exhilarating views of the Giant's Causeway for yourself!

Jess Siswick @tinymallet

Got my fresh air today Soarin' over California at California adventure #disneyland 🐼 #HomemadeDisney

## 471,300 views

of Virginia mom's #HomemadeDisney experience

## Quarantine Culture

# Shoppable content provides easy access to 'affordable luxuries'

### Splurge vs Save

Though some use social to vent about their desire to shop, more people are talking about saving across all markets. Data from countries further into reopening supports the movement to frugality.

### Influencer Fueled E-Comm

Previous recessions have shown people shifting from spending on luxuries to lower cost indulgences. **In China**, influencer e-comm suggests this may already be happening.

92%

of internet users in China intend to work hard to make more money and increase their savings



王仔仙贝 🌟

对于这次疫情更让我明白存钱的重要性，从此从王招变成王抠抠，还是钱在我手里有安全感。

*"After the pandemic I realized how important money is. I have a sense of safety after saving money."*



**150,000**  
lipsticks sold in one TikTok  
livestream by China's so-called  
lipstick king, Li Jiaqi

Source: Netbase || China Business Journal || iiMedia Research

## Quarantine Culture

# Social is open for business.

### Kuaishou

Social and shopping integrations are accelerating in China. In June, the platform Kuaishou will support in-app shopping during live streams.

### Facebook & Instagram

Facebook recently launched “Facebook Shops” where small businesses can create a free online store. Instagram is now helping influencers monetize their IGTV videos.

### TikTok

TikTok started testing shoppable content features for influencers last fall and rolled out a gift giving feature during the pandemic.



300,000,000

DAUs who will be able to shop during live streams on Kuaishou as of mid-June



# Brand Implications

Increase shoppable social content, leaning into affordable luxuries, local targeting, and heightened e-comm experiences to make use out of your consumers' increased time spent shopping online.



# Brand Implications Summary

Social media drives solidarity, connection, inspiration, and utility in a COVID and post-COVID world.

## COPING

Consider the range and brand relevance when incorporating content that supports self care.

## GETTING REAL

Embrace the under polished and approach social with candor

## NAVIGATING NORMAL RESPONSIBILITIES

Rethink where and when to meet your consumer at moments of social interception throughout the day based on their lifestyle changes.

## QUARANTINE CULTURE

Increase shoppable content, leaning into affordable luxuries, local targeting, and heightened e-comm experiences.

swift

# Thank You

**Meredith Chase**

Chief Strategy Officer  
WT West & Swift  
[meredith.chase@wundermanthompson.com](mailto:meredith.chase@wundermanthompson.com)

**21.05.2020**

# The Team



**Meredith Chase**

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Chief Strategy Officer  
WT West  
[meredith.chase@wundermanthompson.com](mailto:meredith.chase@wundermanthompson.com)



**Melanie Costello**

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Associate Director, Data  
Science , Swift  
[melanie.costello@swift.co](mailto:melanie.costello@swift.co)



**Anna-Lee Bridgstock**



**Andrew Lyons**



**Marco Bandini**



**Lucas Wang**