An Historic Moment: The Values Shift In Pandemic America

ZENO GROUP STRATEGY + PLANNING | APRIL 2020

THE HUMAN PROJECT™

ZENO GROUP
This March our researchers at Zeno Group asked 1,000 Americans, “What personal values do you hold in high importance today versus those you held in high regard before the pandemic?”

Generally, core values that drive human behavior do not shift dramatically from year to year.

But like so many other things that have changed in our COVID-19 lives, so have Americans’ views of their most important values – shifting in ways we have not seen since the last time Americans experienced this much economic and social upheaval: The Great Depression of the 1930s.

A new outlook is emerging
# Audience & Methodology

<table>
<thead>
<tr>
<th>Who</th>
<th>How Many</th>
<th>When</th>
<th>What</th>
<th>How</th>
</tr>
</thead>
<tbody>
<tr>
<td>US Adults, Gen Pop 18+</td>
<td>n = 1,000</td>
<td>March 27 – 29, 2020</td>
<td>Values Refresh Study [COVID-19]</td>
<td>Online Survey</td>
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</tbody>
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Margin of Error: +/-3 percentage points at a 95% confidence level
Top Rising Values Amongst Americans

Values that were already a high priority, such as protecting the family, helpfulness, and honesty are becoming even more important for most Americans during this time of crisis.

As financial and material security becomes increasingly unstable due to the economic ramifications of COVID-19, values such as self-reliance, simplicity and thrift are also increasing in importance, as American’s begin prioritizing stability for themselves and their families. Values like these have not showed up before 2020 in the top 10 among the general population.

As Americans face more consequences of COVID-19, such as social-distancing, self-quarantining and working from home, this new daily reality has many Americans reassessing the importance of their stable personal relationships.

We also see the value of duty showing up in the top rising values. This is an interesting shift, especially among the youngest generation, Gen Z, as they already feel the pressure and responsibility to save the planet from many of today's most pressing challenges.

Gen Pop's Top Rising Values:

1. protecting the family (73%)
2. self-reliance (69%)
3. thrift (68%)
4. helpfulness (68%)
5. simplicity (67%)
6. honesty (67%)
7. stable personal relationships (66%)
8. duty (65%)

Source: Zeno Group Values Refresh Study (COVID-19), April 2020

[TOP-2 Box, “Much More” or “Somewhat More” important]
"Considering what is happening around the world with the Covid-19, it is more important to be self-reliant. At the same time, we should not take tomorrow for granted. Life is short, and we need to reevaluate what is really important in our lives."

- Gen X Male, Minnesota

"Times and situations in your life cause many things that were once so important to become the least of importance now. In unstable times, honesty, integrity and caring are more important than ever and it is NOT all about yourself but important to put others first and be kind, considerate and compassionate."

- Boomer Female, California

"I have been staying safe at home the past 10 days and not being able to go out to eat or a movie can be frustrating, so freedom has become more important, the use of the phone and internet has become more important to connect with family and friends."

- Boomer Female, Colorado

"With the coronavirus having the effect on the world that it is, protecting family and friends is most important. Superficial things mean less."

- Millennial Male, Ohio
Aspirational values like power, status, wealth and ambition, which before COVID-19 were key drivers for many groups, particularly career-focused Millennials and Gen Z, are down. Now, as more Americans begin to face urgent, daily challenges, personal aspirations are taking a back seat.

This also demonstrates an increasing humility and perhaps a sense of gratitude given the top values juxtaposed against these falling values. What is interesting among them, however, is that Gen Z places the value of ambition at #1, though it is quickly followed by working hard, protecting the family, thrift and freedom. We conclude here that the motivation for Ambition is not in the self-interest of these young adults, but rather, is powered by their sense of duty versus self-interest.

In a time of social-distancing and lengthy quarantines, many Americans are forced to shift their focus for fun away from the outside-world, looking inward and indoors for self-fulfillment. As a result, values such as adventure, romance and excitement are feeling less and less tangible to most Americans.

American’s are becoming keenly aware of the role they play in solving the COVID-19 crisis, understanding the effects of their decisions on others and the dangers of acting in self-interest.

Source: Zeno Group Values Refresh Study (COVID-19), April 2020
“During these difficult times I’m more acutely aware of keeping positive, supportive helpful and considerate of my friends, family, and community. My self interest, goals and achievement are all put on a back burner while we all focus on getting through this together.”

- Millennial Female, Washington

“In the light of recent events, namely the COVID-19 outbreak, I am more inclined to view my fellow humans as part of a global community. We all need to work together to beat this thing.”

- Boomer Female, New Jersey

“I had a child less than 3 months ago, it made me realize how important the people in your life are, that you should love and protect me, as well as the earth and the environment, so my child has all the support from friends and family that he needs as well as a beautiful world to grow up in.”

- Gen X Male, Minnesota

“Now that I am retired, seen and done a lot of things in my life, I have a chance to really reflect on my life. I have adjusted my feelings, opinions, and outlook on my life... What has become more real and important to me is how I treat other people regardless of how they treat me, and to keep understanding (never knowing what other people may have gone through, or are going through), patience, and love in my heart and spirit. SO CALMING, AND SATISFYING.”

- Boomer Male, Arizona
A Value Shift Across Generations
Top Rising Values by Generation

When thinking about what values have become more important in the last 6 months, most Americans across all generations say the value of protecting the family is a becoming more important.

For Gen Z, values like ambition, working hard, and freedom are rising to the top, while the other generations are focusing more on values like self-reliance, thrift, honesty, and helpfulness.

Source: Zeno Group Values Refresh Study [COVID-19], April 2020
In Their Own Words: Why These Generational Values Are Rising

“These feelings and values have become more important because of this Global Pandemic, not being able to go anywhere or do anything makes you think and realize what is important. I also recently got into a serious relationship so the thought of putting that person first is now more important to me as opposed to just taking care of my own thoughts and feelings.”

- Gen Z Female, New York

“I will probably not sweat the small stuff as much. Minor problems I worried about before seem silly in the eyes of global health concerns.”

- Millennial Female, Illinois

“Family is more important than anything else today.”

- Gen X Male, Indiana

“I am more thrifty and aware of environmental impacts.”

- Boomer Female, Pennsylvania

“Nothing is more important than faith & family, so I let go of things that may have bothered me before. Keeping in contact with family more - mostly by email. Having things besides necessities are less important & I'm spending less on nonessentials.”

- Gen X Female, Nebraska

Source: Zeno Group Values Refresh Study (COVID-19), April 2020
Top Declining Values by Generation

When thinking about which values have become less important over the last 6 months, more individualized values like *status, power,* and *wealth* have fallen the most.

Millennials, Gen X, and Boomers feel that values like *adventure, romance,* and *excitement* are less important, while Gen Z feel their sense of *self-interest,* *belonging,* and *duty* have become less important.

**Gen Z**
1. status (14%)
2. power (12%)
3. self-interest (11%)
4. belonging (11%)
5. duty (10%)

**Gen X**
1. power (25%)
2. status (22%)
3. wealth (19%)
4. adventure (12%)
5. romance (11%)

**Millennials**
1. power (16%)
2. status (16%)
3. wealth (16%)
4. adventure (12%)
5. romance (10%)

**Boomers**
1. status (25%)
2. power (22%)
3. adventure (20%)
4. wealth (17%)
5. excitement (17%)

Source: Zeno Group Values Refresh Study [COVID-19], April 2020
In Their Own Words:
Why These Generational Values Are Declining

“You take much less for granted as you try and protect your family and loved ones as well as contribute as best as possible to your communities to stop this virus.”

- Millennial Male, California

“Wealth and physical property don't mean anything if you don’t have your loved ones with you.”

- Boomer Female, Wisconsin

“It is less important to be successful and rich, but better to have family who cares for you and to care for your community members.”

- Boomer Female, Maine

“I am being much more careful spending because the economy might be severely effected.”

- Millennial Male, Ohio

“I am trying to be a better family man and trying to spend the time I have right now with my family as much as possible.”

- Gen Z Male, New Jersey
What This Means For Our Clients Today:

Key Points This Research Supports

• **A heightened need for stakeholder listening.** Brands and companies need to be sure their communications and actions are aligned with the control and empowerment their stakeholders seek.

• **A premium on problem-solving and community support.** The public will want employers and brands to act in ways that demonstrate they are on their side and will be wary of overt branding and promotion.

• **A greater sensitivity toward economic pressures.** With more than 20 million Americans unemployed, the public will expect companies and brands to conduct themselves with an appreciation of this new economic reality.

• **A return to simple, classic pleasures.** Depending on how long the economy’s slide lasts, and how long its recovery takes, values such as thrift and simplicity may become more central to our lives.
Questions?

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