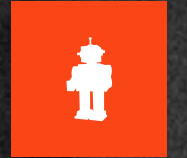


Sustaining the Boom in Home Entertainment

A Deeper Look at Human
Motivations



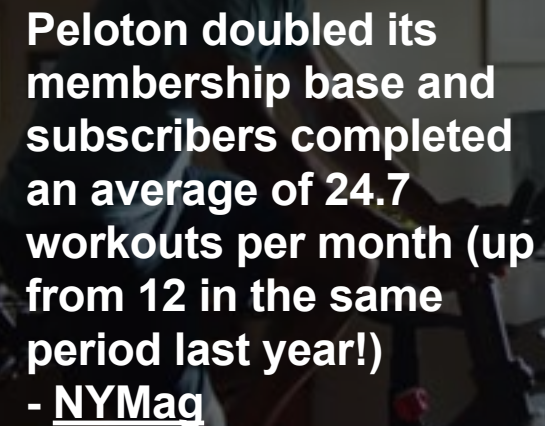
The Sound | October 2020




Covid-19 has led to an explosion of new behaviors at home....

We have witnessed many behavior changes--from more time on screens, streaming entertainment and playing video games, to dedicated spaces for home fitness and Instagram feeds full of home culinary creations.


It's all evidenced by peoples' investments in gadgets, equipment, memberships and subscriptions to help them adapt to their new reality.




Peloton doubled its membership base and subscribers completed an average of 24.7 workouts per month (up from 12 in the same period last year!)
- [NYMag](#)



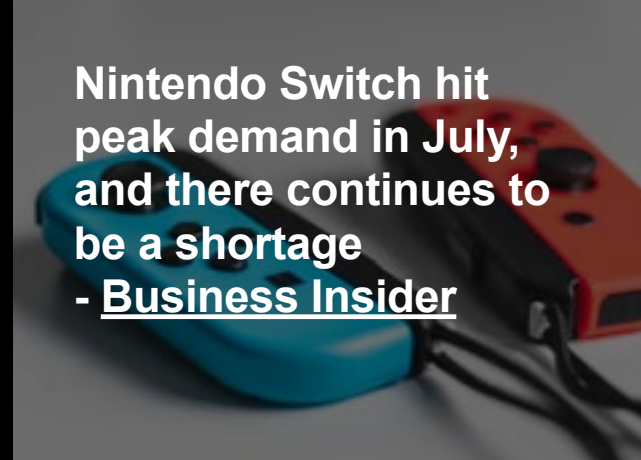
Netflix reached nearly 200 million subscribers by the end of Q2
- [CNBC](#)



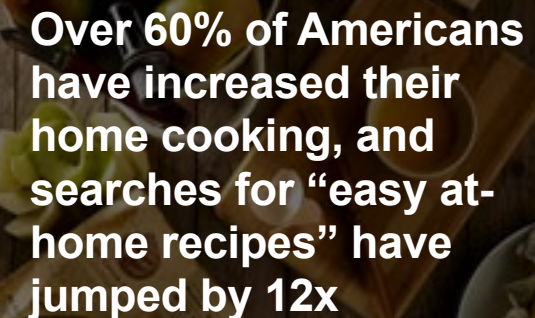
Disney+ reached its 60 million subscriber goal (years ahead of schedule) in July
- [Deadline](#)



TikTok reached over 850 million monthly active users this summer
- [Wallaroo](#)



Nintendo Switch hit peak demand in July, and there continues to be a shortage
- [Business Insider](#)



Over 60% of Americans have increased their home cooking, and searches for "easy at-home recipes" have jumped by 12x

The reason?
Our new
situation.

But what will
stick and
potentially
become ritual?

**The answer lies
in understanding
human
motivations.**



At The Sound, we believe that while behaviors may change as a result of our situation, our motivations remain constant.

Simply, the pandemic has impacted how we satisfy our motivations—with new products, services and solutions—but it has not changed fundamentally *who we are* or *what* drives us





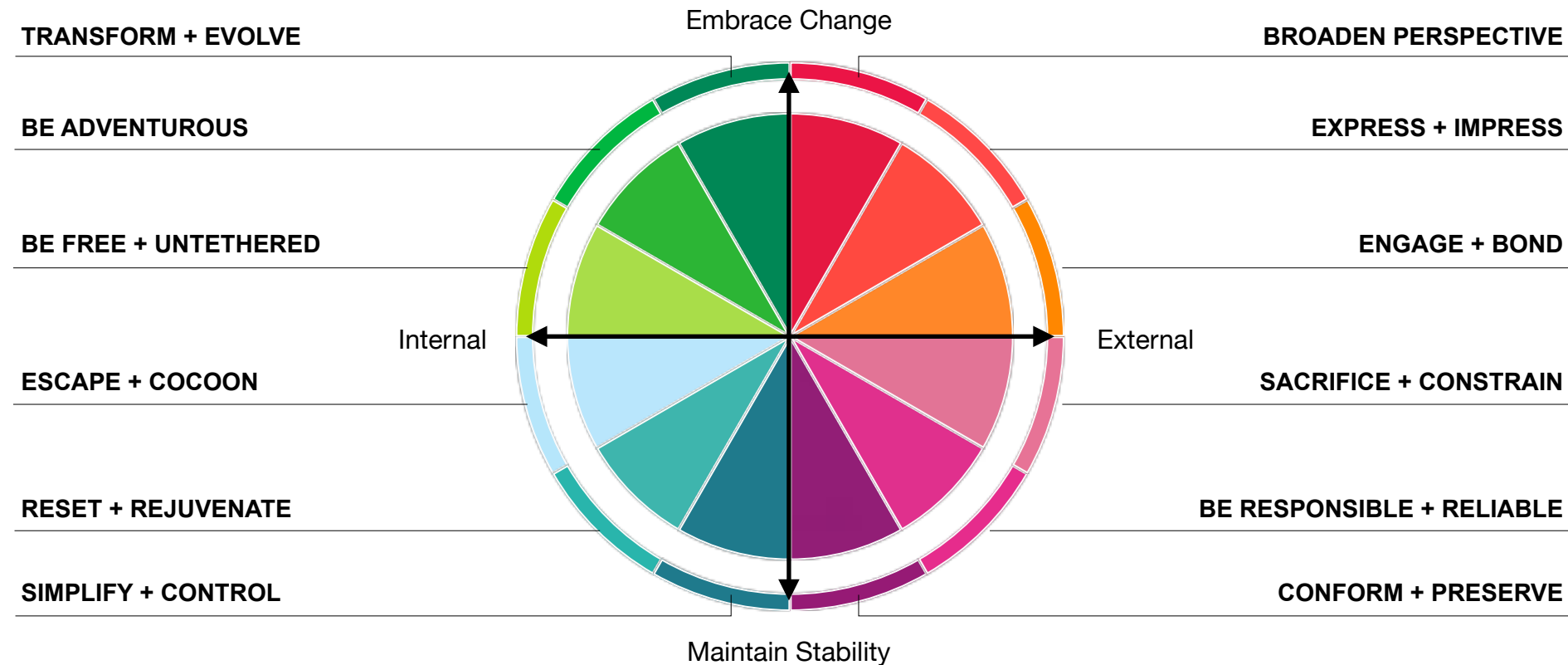
**As our
situation
evolves, brands
need strategies
to stay relevant
and continue to
grow**



Understanding the motivations behind our behaviors and choices will help create products and services that “stick” because they satisfy a deeper need, want or desire ***whether we’re stuck at home, free to move about the world—or somewhere in between***

Foundational research has illuminated 12 motivation “areas”

Each area encompasses our unobservable needs, wants, interests, and desires, that energize and direct our behaviors, and can explain the solutions we choose.

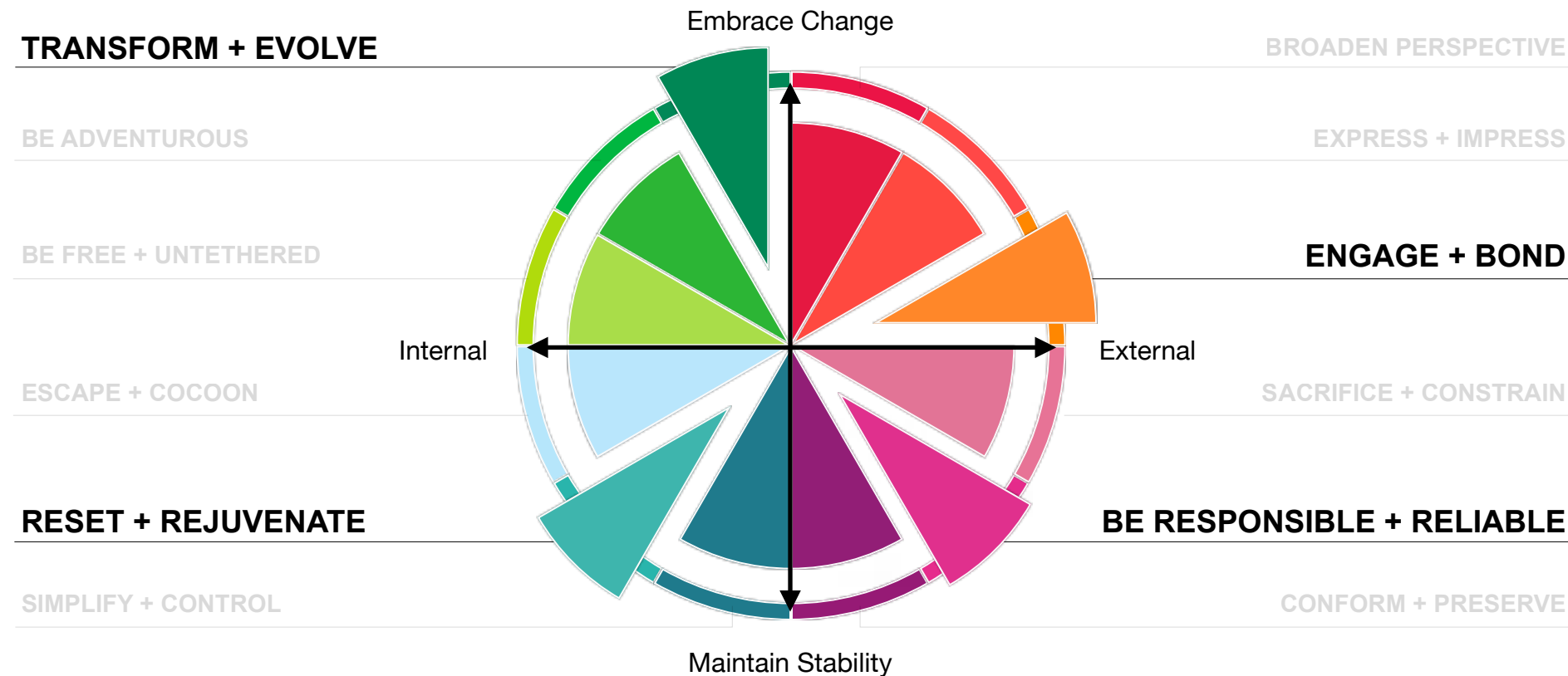




We took a closer look at four

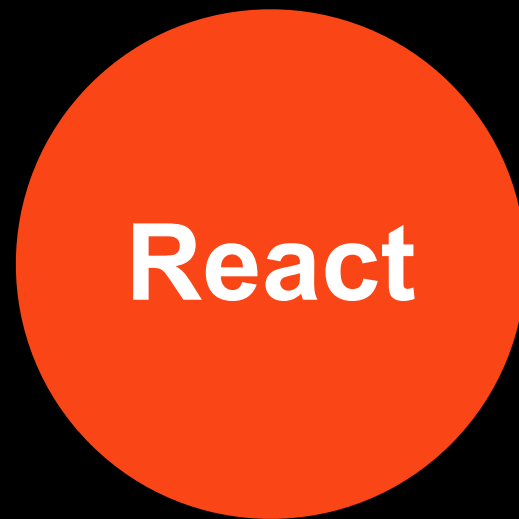
To illuminate the “shifts” in how people are satisfying these 4 motivations, we conducted research with a 3 pronged approach:

- 1) From May-October 2020, we conducted secondary research to continuously analyze trends around our 4 motivations
- 2) In May/June 2020, we collected 210 stories from people age 18 - 65 living in lockdown around the world*
- 3) In September/October 2020, we leveraged social listening tools to analyze consumer generated content via social media sites, blogs, forums, reddit, etc. to capture changes in sentiment around the initial themes.



*North America (United States, Canada), LatAm (Argentina), Europe (United Kingdom), Middle East (United Arab Emirates), Asia (India)

In the short term, we have adapted our behaviors to **get through**



Early Pandemic

In the early months, we found “quick fixes” to address what we thought would be a temporary situation.



Pandemic

With the realization that there would be no “return to normal” and that life must go on, **we are adjusting what we do to get through this period.**

The great pause has allowed us the time and space to be present and deeply reflect, reevaluate what is truly important and reset ourselves, and—out of necessity—be more real with each other, exposing our vulnerabilities and showing our humanity.



“Reminding humans of our mortality, plagues throw up existential questions that can lead to deep cultural shifts.

Andrew Sullivan, 'A Plague is an Apocalypse, But It Can Bring A New World,' NYMagazine, August 2, 2020

Revealing shifts in **what we may value for the longer term**

While our core motivations haven't changed, they've intensified and become more purposeful

From



To

Transform & Evolve

Always being on the fast train to [somewhere]

Redefining personal progress

Engage & Bond

Collecting connections

Carefully curating them

Reset & Rejuvenate

Reactive, quick fixes

Holistic, proactive healing

Be Responsible & Reliable

Giving into the pressures of unrealistic expectations

Reprioritizing those that are truly important



Time will allow for many of these new shifts to take root in a **post-pandemic world**



Post Pandemic

We have adapted our behaviors to get through this period, and with time, **our expectations will follow.**

When we reach the end of the pandemic, not only will we have developed some new behaviors, but also a different perspective on what we can expect—from ourselves and others.

**As we live in a world
forever changed**

**Those who design for
human motivations will
control their destiny**

Brands that continuously evolve with this understanding will be able to better deliver what people need to adapt today and meet their expectations for a post pandemic world *tomorrow*.





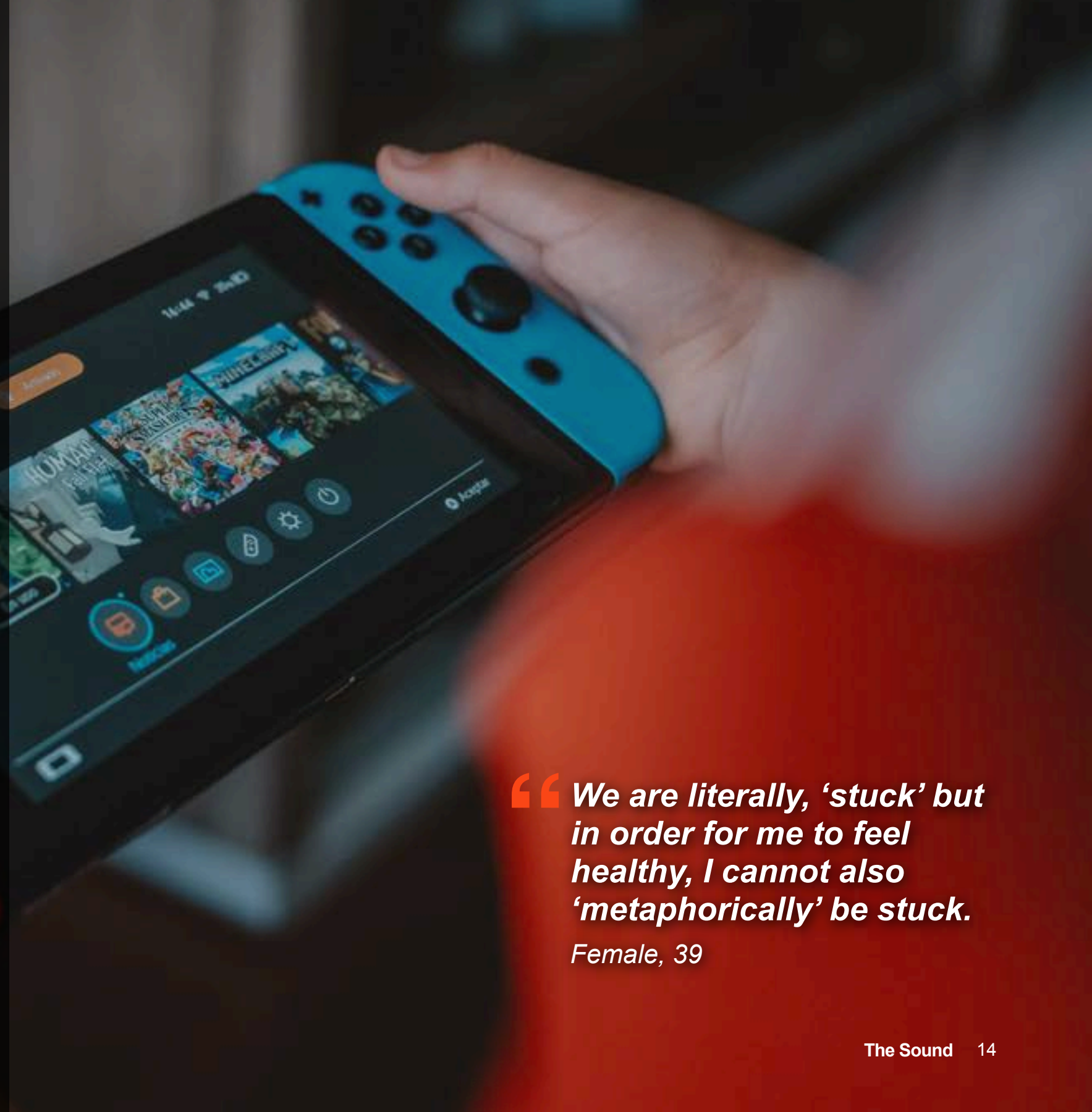
Let's take a closer look



Transform and Evolve

To grow, evolve, reimagine

The global pandemic has created a world where the days and weeks blur together. Though the world has started to open back up, the goals we set out to achieve in January feel out of sync with where we are today, whether it be buying that first house or getting a promotion. We are moving forward in different, and often smaller steps, than we may have imagined for ourselves. We are turning to home entertainment companies to not only help us relieve our boredom, but also fuel our continued desire for progress in new ways.



“ **We are literally, ‘stuck’ but in order for me to feel healthy, I cannot also ‘metaphorically’ be stuck.**

Female, 39



Adapting for today

An increased desire for progress coupled with a lack of clear destination has resulted in new ways to satisfy our motivation to Transform & Evolve



Leveling Up Professionally

People are anxious about their future plans, as we experience a period of economic instability with no clear end date. To prepare for unknown circumstances, we are enrolling in professional development classes, attending virtual industry conferences, diversifying skill sets, turning a hobby into side gigs, etc. to weather the storm.

Forward Momentum Through Smaller Victories

Many of the ways in which we typically achieve progress came to a halt, and as a result, we felt stagnated and unmotivated. Activities that convey a sense of time passing (and even growth) are grounding, e.g. building a muscle, tending to a living plant, creating a physical artifact like a craft, and “smaller victories” give a sense of control that helps to offset anxiety around the state of the world. Today, even though we still feel uncertain about the future, we are starting to adapt by taking smaller steps forward. While we may be delaying that first home purchase, we’re certainly not waiting to move into a new rental with more indoor/ outdoor space.

Focusing on the Silver Lining

Instead of lamenting what we can’t do (e.g. get that promotion, go on that vacation), people are focusing on their covid-19 situation silver linings. Working from home means many were able to finally get the pet they’ve always wanted. Extra time has made it possible to finally pursue that passion project that has been on the back burner for years. Shifting our mindset to focus on the positive —“covid-19 has allowed me to...” vs. “Covid-19 prevented me from”—helps us cope with our new reality.



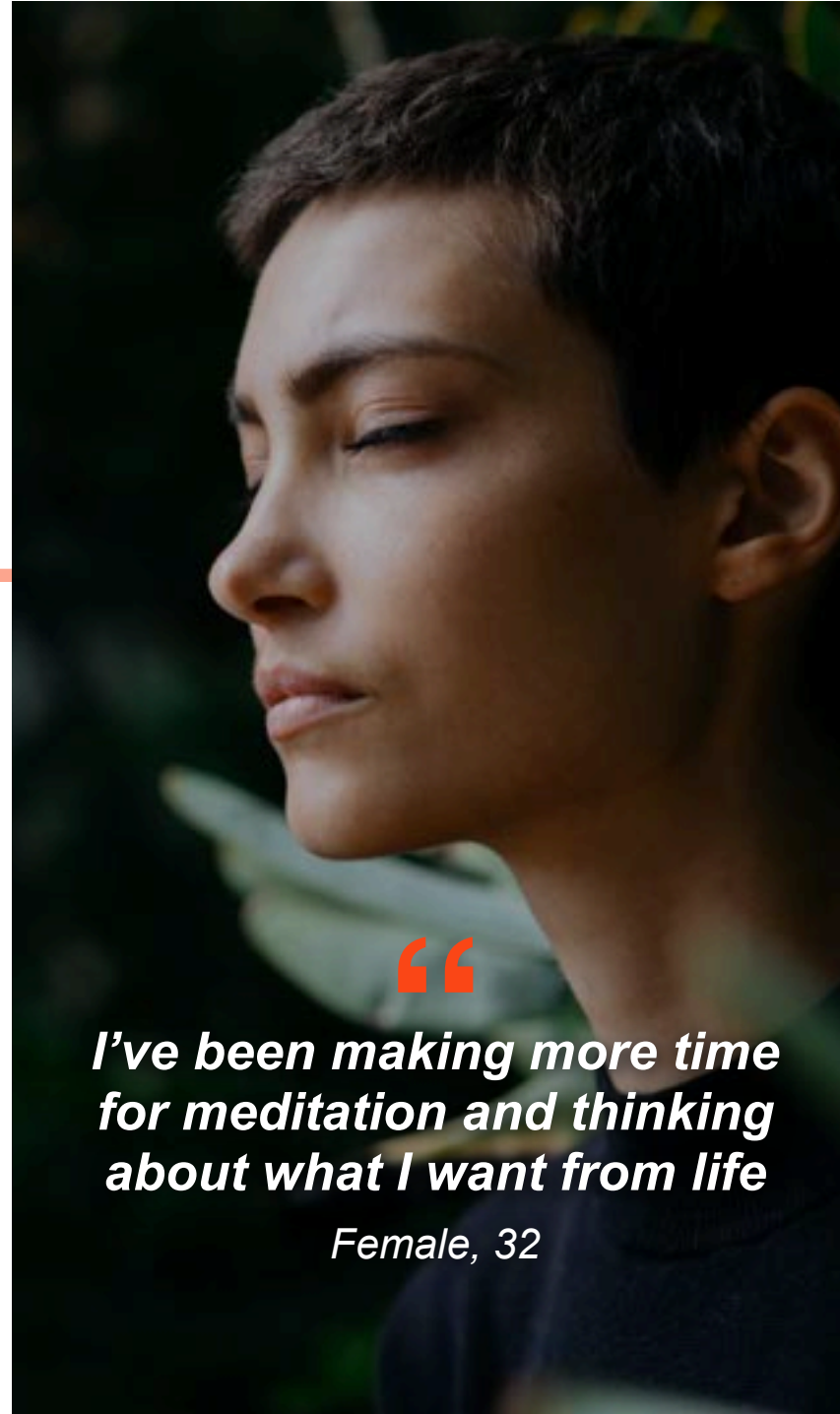


Longer-term shift in what we value tomorrow

From

Always being on the fast train to [somewhere]

Not being able to achieve at the same level as before - with many being forced to press pause on the professional rat race - has given us the time and brain space to reflect and realize that we don't need to define progress as a high-speed train to somewhere.



***I've been making more time
for meditation and thinking
about what I want from life***

Female, 32



To

Redefining personal progress

People are switching career paths, leaving the city to lead a simpler life, prioritizing time with family, etc....and redefining what success means to them. We are appreciating the small stuff and placing less importance on 'progressing' (at least in a traditional sense!)



How can Home Entertainment...

...help people regain control through a sense of progress in smaller, achievable steps?



Animal Crossing was the perfect game for those entering gaming for the first time. The beauty of Animal Crossing is in the simple satisfaction of checking off tasks (fishing, fruit-picking, etc.) and feeling a sense of control in making progress—even if in a virtual world.



The Sims made a comeback with higher sales each quarter of 2020 compared to last year. Building a dream home and progressing your Sim's career and love life goals gives players a sense of orderliness and linear progression that they may not be able to feel in real life right now.

...feed our need for continued growth and forward momentum in a world that still feels on pause?



Pinterest launched its Chefs At Home Initiative inspiring Pinners to not only cook (and eat!) well at home, but also *doing good* for the culinary and local communities. Millions of people have upped their cooking game while at home, and the initiative gives easy recipes, tips and tricks from the home kitchen's of the country's top chefs—all so they can continue levelling up their home culinary skills.



Preply is an online language tutoring marketplace poised to reimagine e-learning. The company recently announced a \$10 million Series A funding round which it will use to expand beyond language instruction and into global markets, as well as evolve with the changing online learning landscape. Tutors and students alike flocking to the platform—with increased tutor registration and student booking hours—meaning there's growing interest in self-betterment.

...support people in re-evaluating and reimagining their path forward?



Thinkific, which allows individuals to create and sell online courses under their own brand, saw a 200% increase in new course creators on its platform since March. They recently raised \$22 million to expand their offering and help shape the future of online courses.

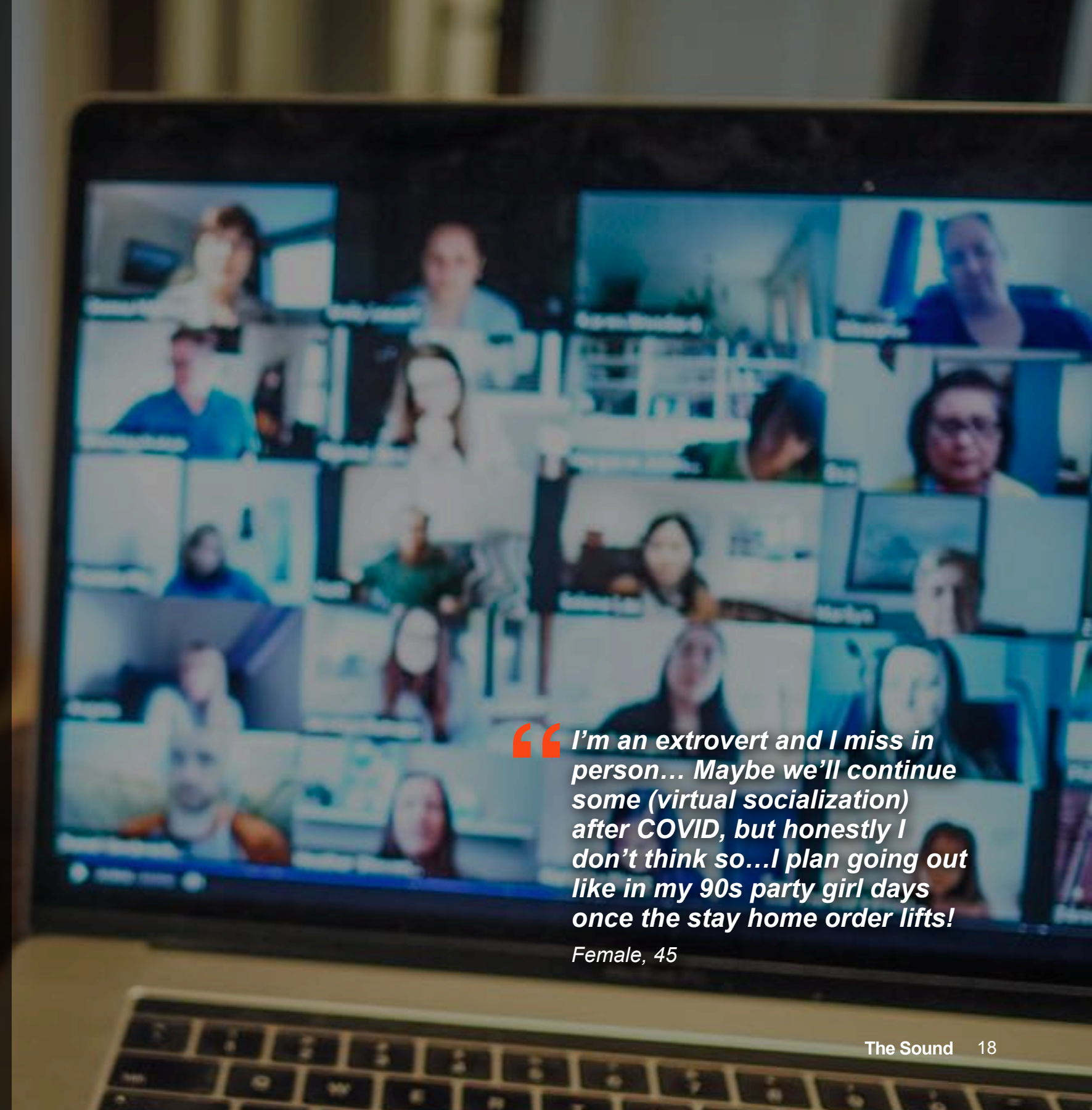


Microsoft, LinkedIn, and GitHub partnered to help millions of workers impacted by Covid-19 reskill for the digital economy. Their free learning paths are mapped to jobs that are in-demand, provide discounted Microsoft certifications to validate skills, and offer best practices for job searching and interview prepping.

Engage & Bond

To lean forward, engage, connect.

As we go through a collective trauma, we are experiencing an intensified need to feel close to others. During this period of social distancing, people are engaging in all sorts of new behaviors in order to connect to friends, family, neighbors, co-workers, old friends, exes, and even strangers on the internet. There's no deficit of virtual solutions, but they often feel like cheap substitutes for the real thing.



“ I’m an extrovert and I miss in person... Maybe we’ll continue some (virtual socialization) after COVID, but honestly I don’t think so...I plan going out like in my 90s party girl days once the stay home order lifts!

Female, 45



Adapting for today

To satisfy our motivation to Engage & Bond, we've adjusted how we are connecting, who we are connecting to, and what we are connecting over



Virtual Fatigue is Real

Virtual substitutes like Zoom dinners don't compare to IRL quality time and can be incredibly mentally draining, as we have to work harder to process non verbal cues and avoid interrupting each other, particularly in group situations. Virtual activities seem to be the exception because they offer natural pauses in the conversation and provide an entertaining focus for the interaction.

Widening & Narrowing of Social Circles

We cut loose some relationships that were perhaps not worth the 'work,' while we sought to deepen our connection with others. Some rekindled relationships with college friends and exes, feeling comforted by the voice of someone who really knows them (or at one point cared for and loved them), and the nostalgia of better times. But, as time goes on, we're starting to "miss the chitchat" from our more casual relationships—those with whom we may not feel close enough to necessarily start an online relationship. And it's contributing to our feelings of loneliness.

Less Small Talk, More Real Talk

While going through this collective trauma, people are experiencing a desire to be authentic. We are opening up to the people in our daily lives – from neighbors to cashiers – really meaning it when we ask "how are you?" and really listening to each other, e.g. forming new habits of 'no phone' family dinners. The shift towards vulnerability has also extended to our social networks, as we share silly dances in our pajamas and seek out others for hope and positivity, as well as commonality through niche shared interests.



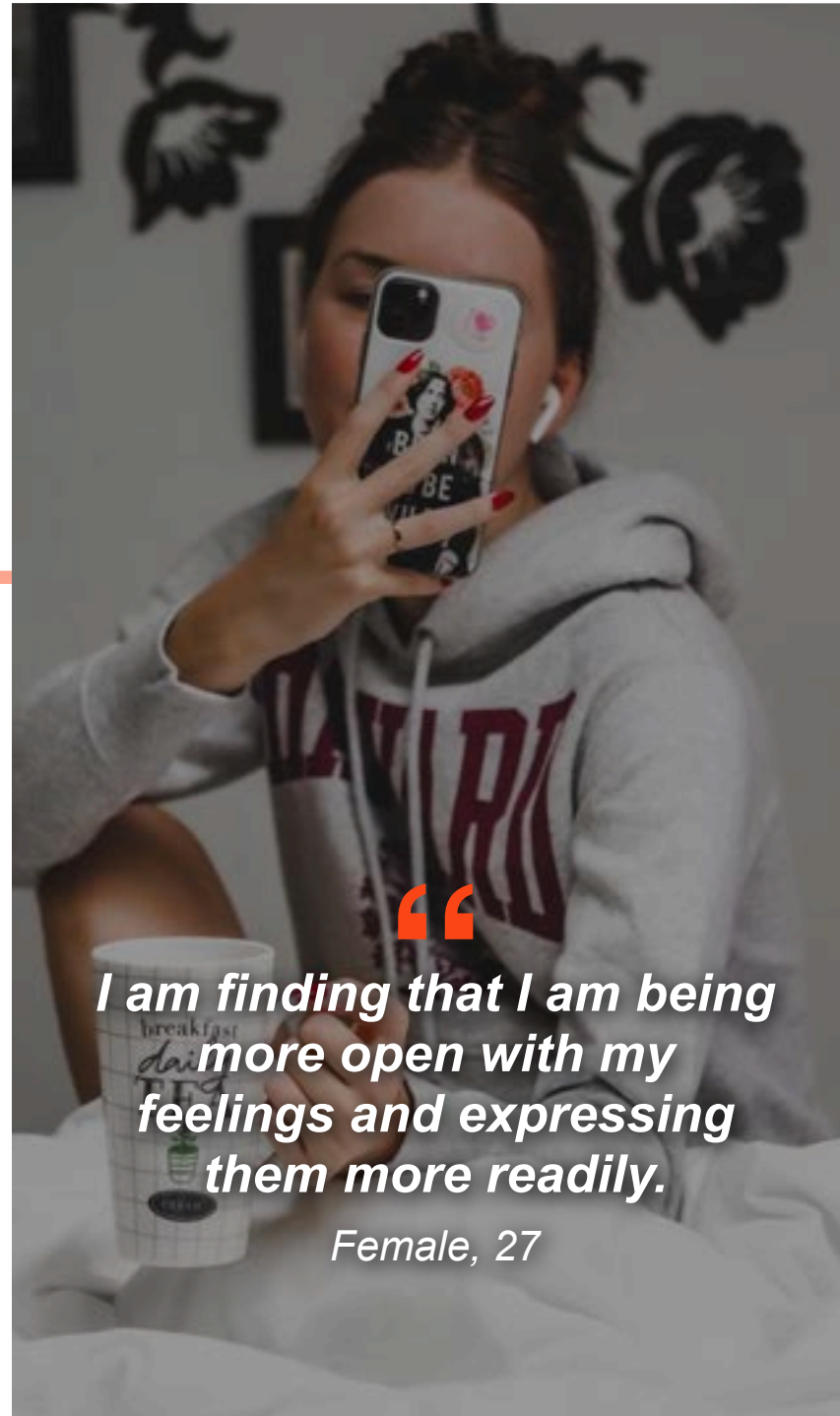


Longer-term shift in what we value tomorrow

From

Collecting connections

We've experienced the value of being more intentional about relationships—focusing on the ones that provide a sense of security, safety and belonging and allow us to be ourselves vs. the ones that feel like maintenance. The trend towards vulnerability vs. performance on social media has allowed us to find and connect to others, just like us, those who are experiencing the same struggles (e.g. working parent during COVID) or share a niche passion (e.g. pet frog owners sharing videos of their frogs wearing hats on TikTok).



To

Carefully curating them

Now that we've experienced the value of deeper and more meaningful connection—and how it makes us feel more secure in the face of uncertainty—we will likely continue to seek it out in an uncertain, post-pandemic world.



How can Home Entertainment...

...facilitate meaningful connection without the burnout?

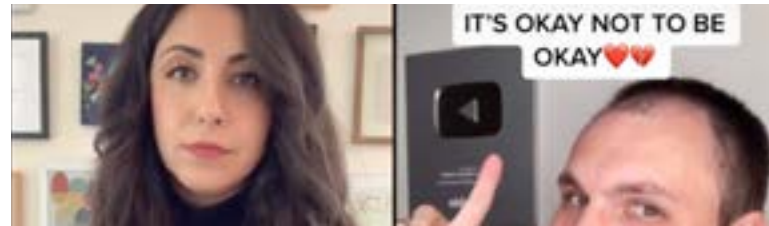


Airbnb offers virtual experiences with hosts around the world, so you can learn a new skill or tour an interesting place with your friends and family—or even strangers.



Houseparty makes it so users don't always have to "talk"—but can just *be together*. While no platform has perfected the virtual group dynamic, this app may come closest. Designed so users can 'wander' at will and drop in on each other or different friend groups, and play games—like Uno, Word Racers, or Heads Up!—it feels more natural and organic than the scheduled one-on-one conversations, or awkward group video get-togethers.

...encourage deeper connection through realness and vulnerability?



TikTok's huge increase in usage reflects a desire for the real and raw. In addition to silly pajama dances, people are increasingly sharing stories about trauma, mental health and healing, which encourages others to do the same.

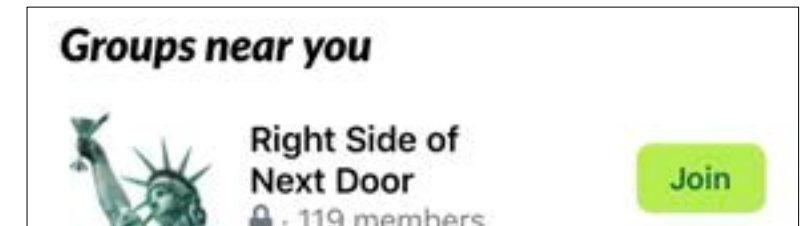


The Meet Group, through its apps MeetMe & Plenty of Fish, have launched live dating game shows and streaming features. The LIVE! feature allows members to broadcast themselves in their day-to-day lives with the ability for other users to comment in real time. With 1.2 million broadcasters and 8.9 million viewers per month, The Meet Group is adding a dose of social entertainment while providing meaningful connection and an antidote to loneliness.

...combat loneliness by restoring the social benefits of groups?



Discord saw a massive increase in users as people created communities around shared interests, from book clubs to art projects to workout classes, weekly to weekly D&D nights. In response, they upped their Go Live group limit to 50 people and developed a background noise suppression feature (so your voice can be heard over your partner vacuuming or your kids slamming doors!)



During the pandemic, **Next Door** launched a Groups feature, which allows smaller groups to form outside the main feed. Similar to Facebook Groups, Nextdoor's groups allows communities to organize around topics, interests, providing aid or anything else. But unlike Facebook, Nextdoor validates users by phone or postal mail.



Reset & Rejuvenate

To look inward, pause and prepare

We've been on the road to burnout for a long time, coupled with a growing wellness movement that's made us more aware that the way we're living our lives simply isn't sustainable. In the hustle of our "normal" lives, relaxation was all about quick fixes, squeezed into busy schedules just so we could check the box that we've "self-cared." Now, COVID-19 has forced an unthinkable slow down, giving us more time than ever to relax and creating a crisis that has necessitated a shift in how we relax, so we could cope with—and maybe even thrive during—the daily trials we now face.

“ Life seems more tiring these days. Work feels more intense, sitting in front of a screen all day probably makes me have low energy, or maybe it's just the underlying low level of anxiety all the time... In any case, I am needing a lot more chill out time than before.

Female, 30



Adapting for **today**

Satisfying our motivation to Reset & Rejuvenate when we're more on edge than ever requires an evolution in how and why we relax



Relaxing with Intention

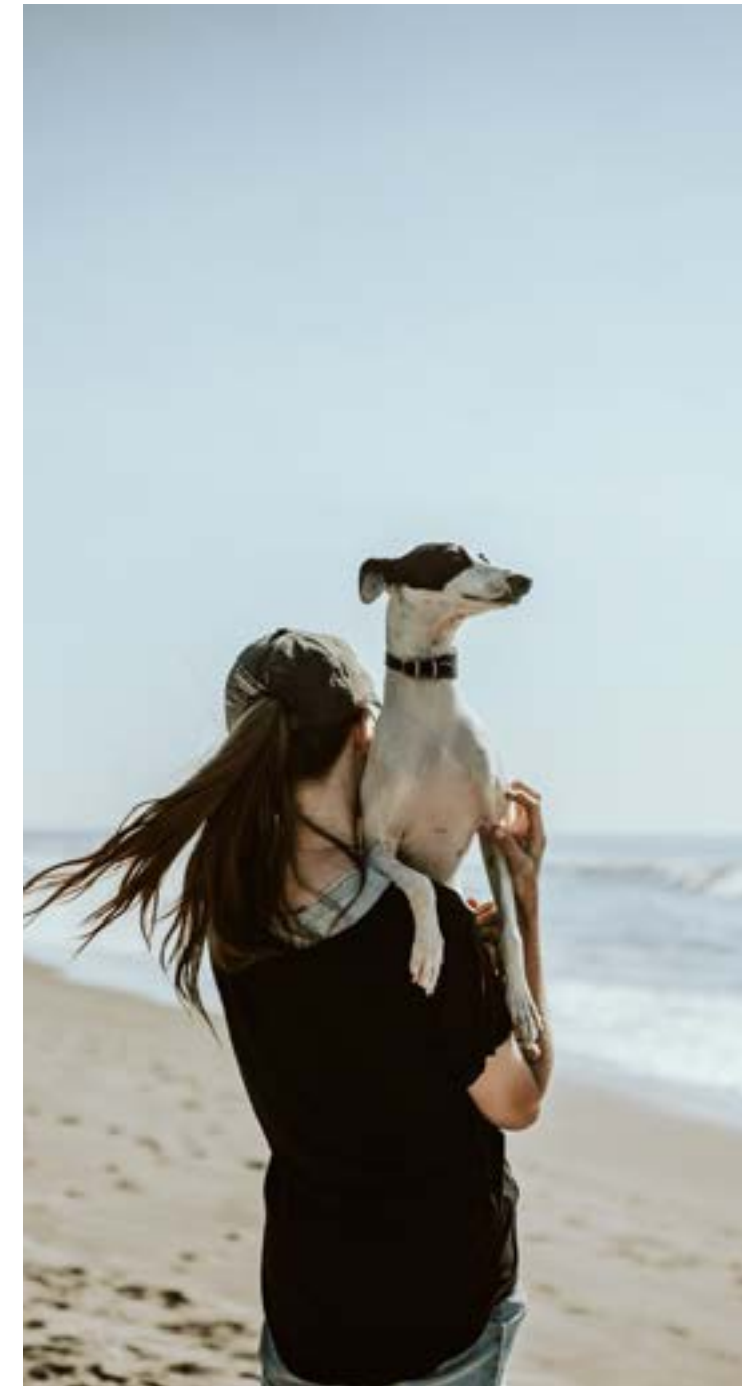
As people have sought to regain control of their lives, we've seen a trend towards trading more mindless methods of relaxation for those with clear long-term benefits, improving one's productivity, creativity and overall happiness—even if they require more time spent in the meantime. We saw people turning to things like gardening, houseplants and sourdough starters to relax while (literally) growing something for the future and others rediscovering the joy of learning, whether that's via passion projects, new exercise routines or something entirely different.

Embracing Different Ways to Heal

With the global health crisis has come a *mental* health one, and giving ourselves permission to relax has become an absolute necessity. People are increasingly finding peace in doing nothing—whether that means finding ways to mentally escape through video games or TV shows that connect us to a world we can't be in, or pursuing deeper healing through a newfound value and prioritization of more—and better—sleep.

Pursuing Meaningful Self-Reflection

As people began to burn out from constant (yet often unfulfilling) virtual social connections, they started embracing the beauty and benefit of being alone, smashing any stigma of unapologetically enjoying “me time” and using this time to look really inwards. The “back to nature” craze presents an interesting dynamic here, with people doing everything from working in regular walks into their daily schedule to urbanites flocking to the suburbs for access to green space and fresh air—to people picking up and leaving on solo excursions in the great outdoors.





Longer-term shift in what we value tomorrow

From

Reactive, quick fixes

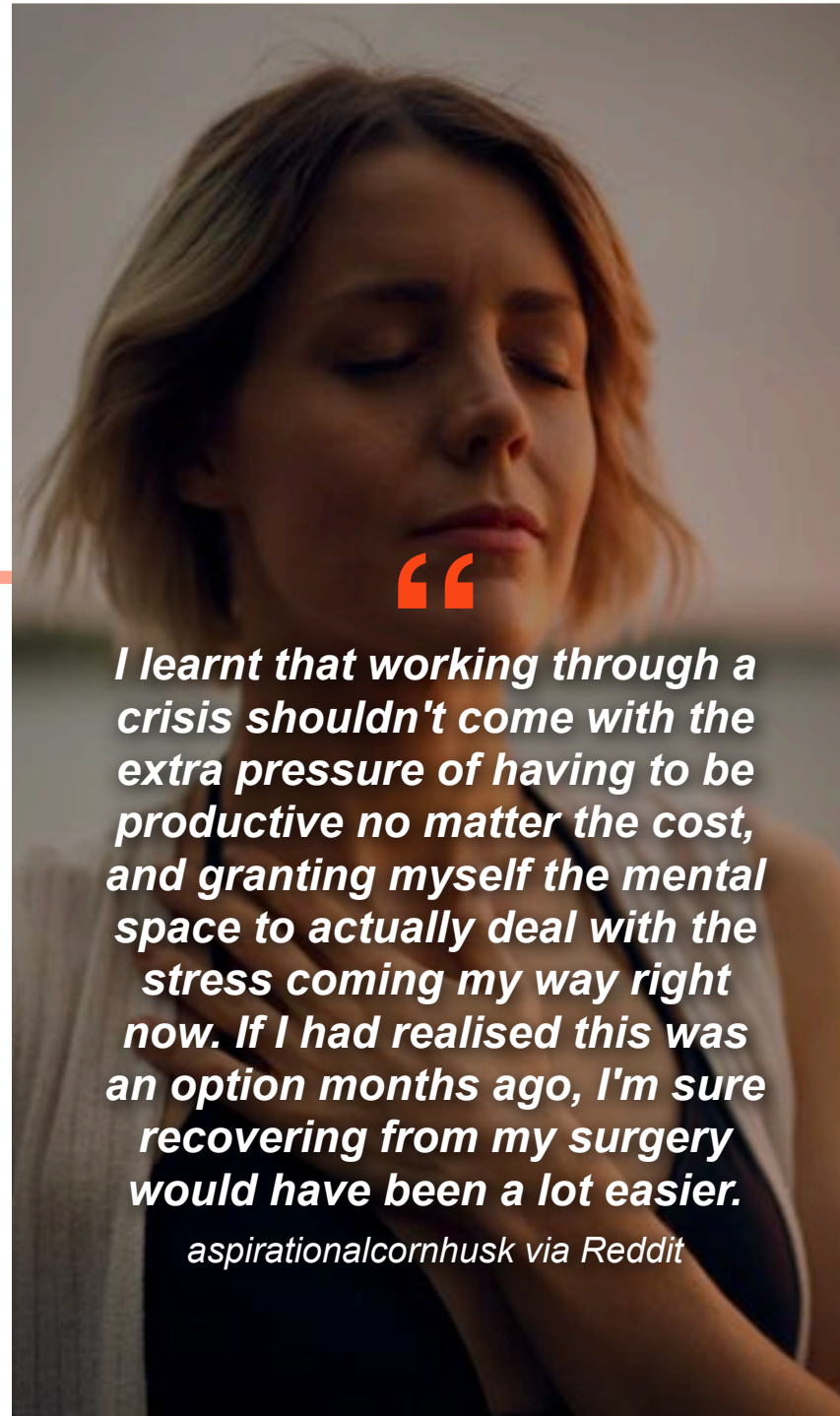
As people reap the rewards that come from truly prioritizing one's physical, mental and emotional well-being, it will be hard to go back, even as we become less and less homebound. The world we re-enter will be increasingly unpredictable, meaning the need to maintain an intentional approach to wellness will be all the more essential.



To

Holistic, proactive healing

More so, while we may be experiencing the “great reset” now, the desire to take time to look inwards, consider our identities and long-term aspirations, and then take the necessary steps to shift our paths forward, will likely remain as people continue to seek future growth (and as this growth feels more in reach beyond the confines of our home).



I learnt that working through a crisis shouldn't come with the extra pressure of having to be productive no matter the cost, and granting myself the mental space to actually deal with the stress coming my way right now. If I had realised this was an option months ago, I'm sure recovering from my surgery would have been a lot easier.

aspirationalcornhusk via Reddit



How can Home Entertainment...

...shift “quick-fix” forms of entertainment to ones that offer a clear long-term benefit—allowing us to relax, while simultaneously contributing to improved productivity, creativity, and happiness?



Masterclass has seized the moment as people seek more intentional forms of entertainment, hoping to relax while rediscovering their love of learning or pursuing passion projects. With everything from business classes focused around career growth to more lowkey gardening or cooking classes, there’s something to meet everyone’s unique needs during this time.



Whoop is a wearable device that takes a holistic approach to fitness—focused on balancing recovery, strain and sleep to meet your specific goals. With people turning to new exercise routines as a means of relaxation, it’ll be all the more important for fitness-driven brands to think how they can best serve people beyond the obvious physical benefits.

...play a meaningful role as we transition from a public health to a mental health crisis—no longer just providing an outlet to escape but truly helping us feel more grounded and better connected with ourselves?



Ikea’s new ad campaign in the UK/Ireland focuses on the deep benefits of proactive, restorative sleep—over the surface and reactive fixes we often turn to when we don’t get enough of it. While not a COVID-campaign, but an extension of their current sleep initiative, IKEA is certainly onto something.

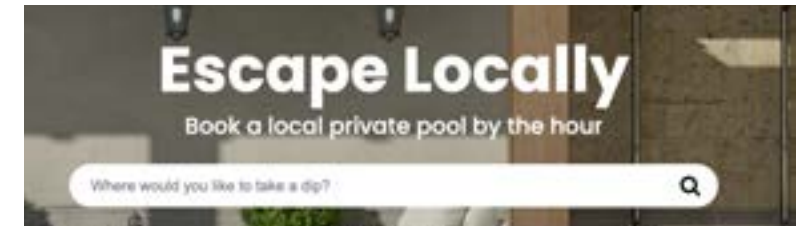


Netflix debuted a weekly Instagram Live chat series called “Wanna Talk About It?,” featuring stars from the streaming service’s hit shows for Young Adults, along with mental health experts. Each episode explores different subjects such as how to manage anxiety or prioritize self-care.

...re-engineer entertainment to better support this desired state of embracing the beauty (and benefits) of uncompromising “me time”?



Globe is just one rent-a-room-by-the-hour service that has boomed in the past few months, allowing people to escape to a private oasis (e.g., a decked out apartment or home)—whether they need a quiet place to get work done or just a change of scenery and time for themselves.



Swimply and **Joyspace** have tapped into the nature craze, targeting people who may lack outdoor space themselves and allowing them to rent pools, majestic backyards, tennis courts and even docked boats.



Be Responsible & Reliable

To follow rules,
be dependable

Among all of the motivations, responsibility is one of the most overwhelming to face, and least satisfying to solve because societal expectations are relentless. Everywhere you look, there's someone or something telling you what you should be doing in order to be a responsible adult. During COVID-19, we saw that the pressure to be responsible only intensified as people took on additional roles and dealt with new situations.

“*There is a need to protect your family from the virus, there is a need to keep your family happy and motivated, there's a need to make sure your child is still learning in this new homeschool environment. You feel like you have a lot of balls up in the air, and they're all important, and you don't want to drop a single one.*

Female, 51



Adapting for today

To satisfy our motivation to Be Responsible & Reliable, we find our greater humanity while simultaneously revealing our vulnerabilities



An Expanded We

There's been a growing collective consciousness and empathy for others who are experiencing this crisis with us, beyond just our immediate family, especially when there are so many who are struggling physically, financially, and mentally. Our sense of responsibility has expanded to a larger group of people, from helping out neighbors and older relatives to feeling more accountable to our communities, making an effort to shop at local businesses and volunteer.

Relying on Self

When the lockdown hit, many people suddenly had to take on responsibilities that they typically outsourced to others, such as cooking, cleaning, child care, education, repairs. Due to necessity, many welcomed the reopening of daycare, schools and activities, getting their kids back as soon as they could. However, the trend towards self-sufficiency and DIY remains even as the world opens up, whether from a genuine satisfaction with a new skill they developed or the need to be financially responsible due to the uncertain economy.

Blurred Boundaries

In the past, our responsibilities had clear boundaries between work, family, and personal time, and we felt more in control over our schedules. Now many of these boundaries have blurred, and the demands of each have intensified, leaving it virtually impossible to operate at the same level as before. Many of us, particularly working parents, have sought solutions to survive through the high stress, but feel the residual guilt of what we do to get through the day, and like we're failing those who depend on us.





Longer-term shift in what we value tomorrow

From

Giving into the pressures of unrealistic expectations

It's no surprise that the increase in responsibilities and feelings of guilt around fulfilling them all to a high standard have led many to the verge of burning out.



To

Re-prioritizing those that are truly important

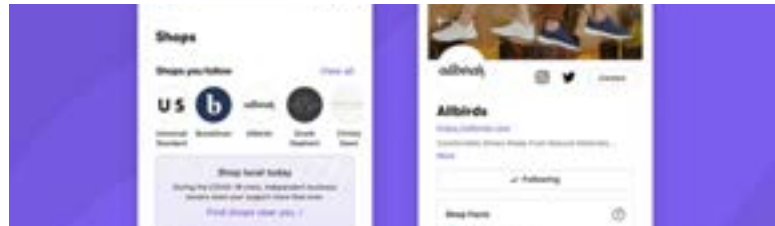
To cope, people are leaving the "I shoulds" in the rearview mirror and focusing on doing what's essential - being responsible for keeping ourselves and our families safe and happy and getting our work done.

Letting go of the expectations of what it means to be a perfect [Parent, Partner, Friend, Boss, Employee, Neighbor, etc.] may have been necessitated by the situation, but likely will have far reaching impacts on our approach to work, parenting, etc. going forward.



How can Home Entertainment...

...make it easier for people to share in the responsibility of supporting their communities?



Shopify created a local section on their Shop app, so shoppers can easily discover, follow, and buy from locally-owned businesses.



Nextdoor partnered with Walmart to create "Neighbors Helping Neighbors" which enables neighbors to connect and coordinate groceries, medications, etc. contact-free.

...ease the pressure valve for [working] parents, knowing there may be residual feelings of guilt and failure weighing them down?



KiwiCo offers a monthly subscription of STEAM activities that are exciting for kids to get in the mail, fun to do, and occupy them for hours. It's screen-free (and educational!) entertainment that parents can feel good about. The subscription model also means parents don't have to bear the mental load of researching and planning an activity – it just arrives at the doorstep.



Abacus Brands launched VR kits for kids focusing on science, the universe, magic, and cooking, that incorporate augmented reality and virtual reality to make learning fun. Each kit combines hands on projects in the physical world, such as building and erupting a volcano, with immerse technology to connect the idea to real life examples, such as teleporting to see a historic volcano in action.

...give parents a "fuck it" moment or a hall pass from being "perfect"?



A recent **Kraft Mac & Cheese** ad featured user-shot home footage of kids screaming and running around, disrupting a peaceful morning and told parents that it's okay to serve mac & cheese for breakfast because "you 100 percent need a break."

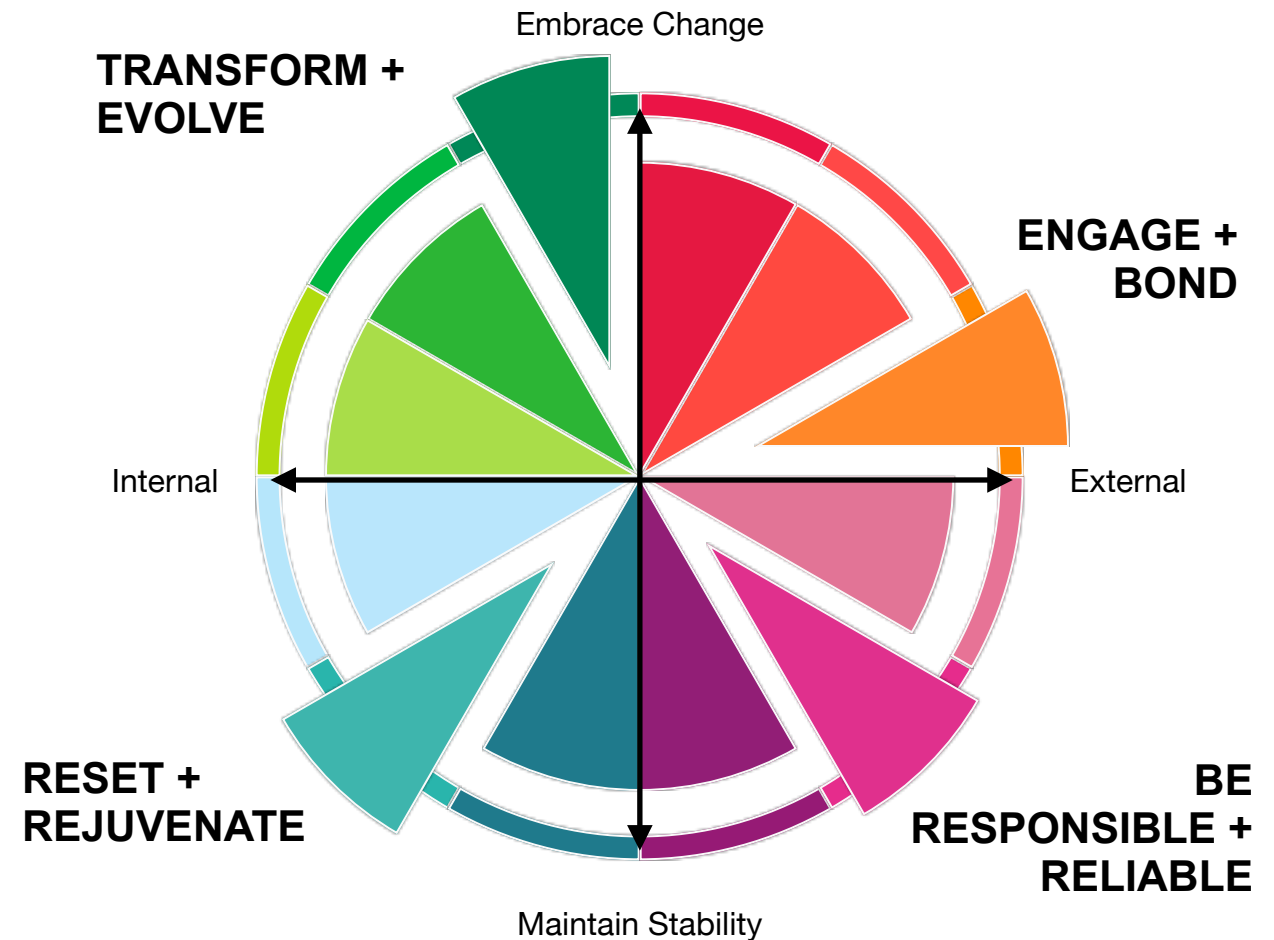


GitLab embraces the blurred boundaries and encourages employees to bring their whole selves to work. They are flexible with nonlinear workdays, state that 'meetings are not about the background' in their employee handbook, and invite children to take over for their parents and say hi to each other if a meeting ends early..



Developing A Proactive Strategy to Sustain & Grow Success

- 1 What is the core motivation behind engagement with your brand today?
- 2 What motivation(s) could your brand better satisfy tomorrow?
- 3 And how can you leverage motivations and the shifts in what we may value to shape communications and innovations to meet expectations in a post-pandemic world?





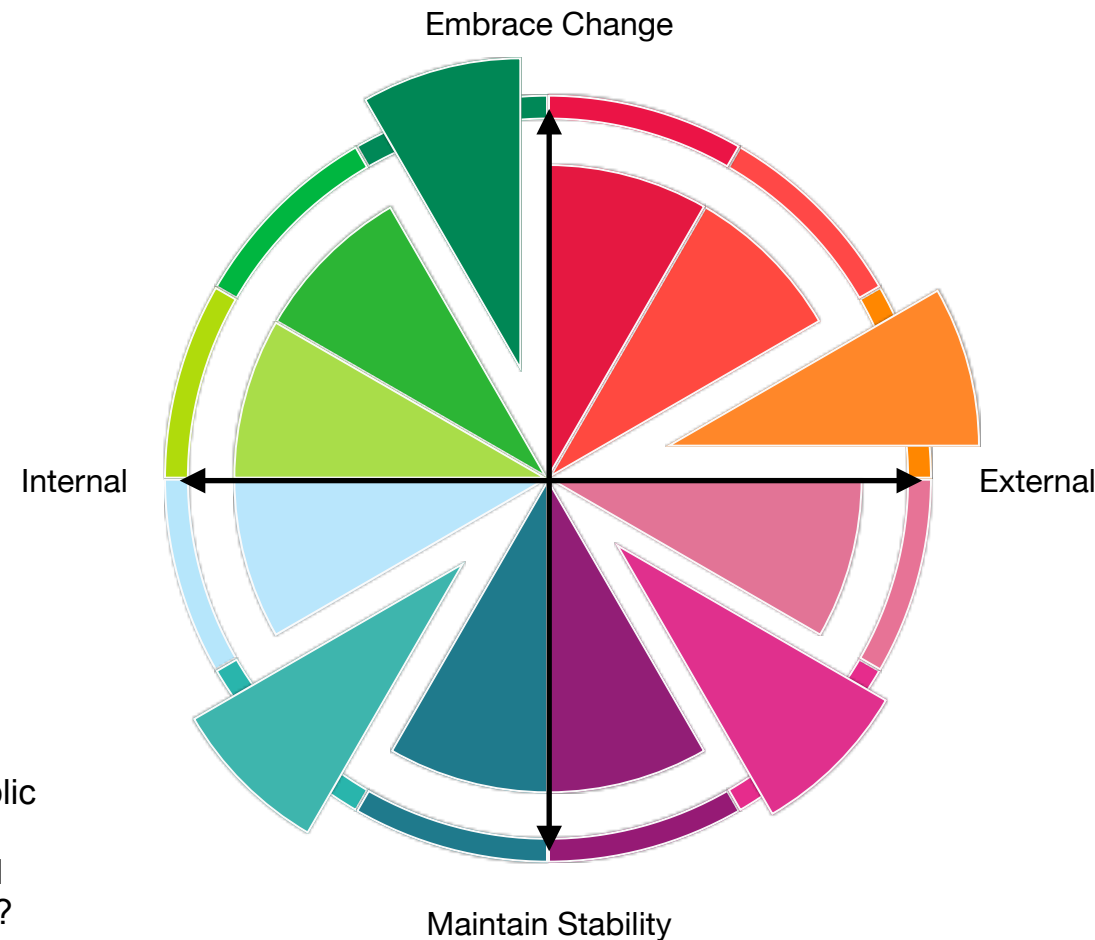
How can Home Entertainment...

TRANSFORM + EVOLVE

- ...help people regain control through a sense of progress in smaller, achievable steps?
- ...feed our need for continued growth and forward momentum in a world that feels on pause?
- ... support people in re-evaluating and reimagining their path forward?

RESET + REJUVENATE

- ...shift “quick-fix” forms of entertainment to ones that offer a clear long-term benefit—allowing us to relax, while simultaneously contributing to improved productivity, creativity, and happiness?
- ... play a meaningful role as we transition from a public health to a mental health crisis—no longer just providing an outlet to escape but truly helping us feel more grounded and better connected with ourselves?
- ... re-engineer entertainment to better support this desired state of embracing the beauty (and benefits) of uncompromising “me time”?




ENGAGE + BOND

- ... facilitate meaningful connection without the burnout?
- ... encourage deeper connection through realness and vulnerability?
- ... combat loneliness by restoring the beauty and benefits of groups?

BE RESPONSIBLE + RELIABLE

- ... make it easier for people to share in the responsibility of supporting their communities?
- ...ease the pressure valve for [working] parents, knowing there may be residual feelings of guilt and failure weighing them down?
- ...give parents a “fuck it” moment or a hall pass from being “perfect”?



**Questions?
Want to brainstorm?
Let's chat.**

THE
SOUND
Exploration. Strategy. Innovation.

www.thesoundhq.com