Starcom

The Future is **Introverted**

"For a long time, introverts have been saying that the social world is designed to favor extroverts. Whether it's finding a romantic partner, being able to make friends, or networking to advance your career, extroverts with their smooth social skills and willingness to talk to strangers seem to have an automatic advantage. In 2022, it's finally okay for introverts to come out of the closet so to speak."

-Dr. Rachel Lawes, Semiotician

For the last 2 ½ years, we've endured sometimes deafening quiet: The pandemic forced the majority of Americans to step back from their usual social schedules and created a culture of homebodies. Now, as we emerge from lockdowns and try to find our steady state again, we must assess how much we've changed and what of our old lives is worth resuming.

In order to understand how human interactions have changed over the last three years and what those changes mean for the future, Starcom partnered with MESH to survey 2353 people around the U.S. We sought to understand whether people have become more withdrawn, and what impact this has on how they experience the world.

The casualties of COVID-19 and America's polarization, at large, are numerous and

would require a seemingly infinite about of time to extrapolate. For our purposes, we've concentrated on one that's difficult to debate: personality typing. Between digital detoxes, float tanks, and noise canceling headphones, introverted Americans keep searching for coping mechanisms to deal with sensory overload and the belief that the world now feels eerily unfamiliar.

We augmented this research with semiotics from Dr. Rachel Lawes of Lawes Consulting and social listening to get a full picture of how we talk about and understand issues of personality type in our daily lives. Our results showed us the impact of personality type along four different dimensions: people, language, experiences, and brands.

Key Findings

1

People
The COVID-19 pandemic didn't just enable introverted tendencies. It created net new introverts.

Personality type needs to be a critical component of how brands think about their audiences.

2

Language
The definition of introversion has expanded to include not just physical isolation, but mental health, social aggression, and comfort level.

Brands should be supportive not coercive.

3

Experiences
Younger consumers are transforming personality into a critical marker of identity.

Brands must measure the impact they have on both ends of the personality spectrum.

4

Brands
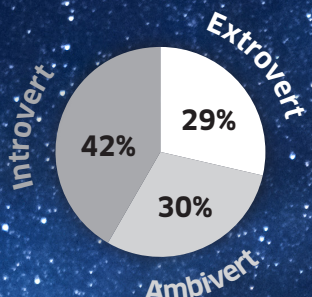Inclusive marketing of the future must incorporate introversion.

We need a modern set of signals to spot introverts in the wild.

People

The pandemic changed people, not just their behavior. The vast majority of Americans had their social activities affected at least somewhat by the pandemic. But the impact goes beyond just their actions. For many Americans, the pandemic made them introverts.

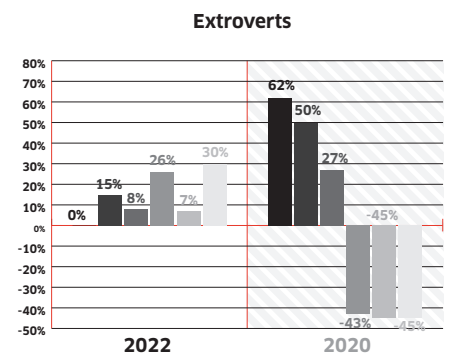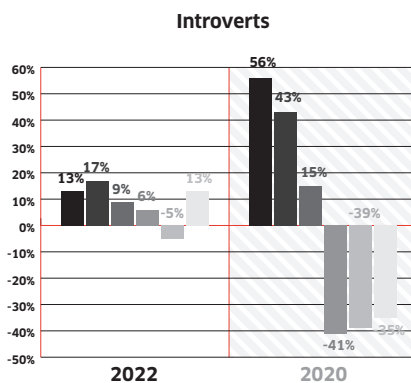Isolation is no longer a punishment, it's a choice.

Extrovert 29%
Ambivert 30%
Introvert 42%

During the strict, circa-Spring-2020, lockdown phase of the pandemic, fewer people ventured out without an essential reason to do so. Social interactions were largely reduced to whatever video-chat app was trending that week. Over the past year or so, those restrictions have evaporated, and things have slowly returned toward pre-pandemic conditions. That said, our study found social reticence remains among introverts and extroverts alike, and is now by choice, rather than necessity. While the majority of respondents described continued fears of COVID for why they haven't resumed previous activity levels, many also cited permanent lifestyle changes in their work and social lives. Among the top reasons cited were a permanent shift to remote or hybrid working, relocation to lower-density areas, and a new appreciation for solo activities around their home. "I have learned to appreciate my solitude," one respondent mentioned.

Insular & Noninsular Introverts Versus Extroverts

Time spent in my own home
Consuming media
Time spent interacting online
Time spent with people with in-person
Number of guests I invite to my home
Activities outside of my home

Introverts

2022: 13%, 17%, 9%, 6%, -5%, 13%
2020: 56%, 43%, 15%, -39%, -41%, -35%

Extroverts

2022: 0%, 15%, 8%, 7%, 26%, 30%
2020: 62%, 50%, 27%, -45%, -43%, -45%

Pandemic relocators found more introverted places.

Introversion and extroversion are often framed as deeply personal characteristics, but they can be as much a function of nature as nurture. Introversion depends, too, on where you live. People who lived in more densely populated areas tended to be more extroverted and vice versa. On the one hand, being around people all the time makes it difficult to maintain the solitude introverts prefer. On the other, more introverts might choose to move to less-populated areas to the potential for social interaction. This is true on the regional, local, and household levels.

Regional

In the words of Dr. Lawes, "There's a cultural element to being a shut-in." Every country has a different level of introversion. For example, more than half of Lithuanians (56%) consider themselves introverted, making it the most introverted country in the world. When we looked within America, we saw this regionality as well. Our results showed that more populated states like California are also more likely to feature extroverts. Meanwhile, the southwestern states were filled with a disproportionate number of introverts, and it's in this area where many Americans chose to move during the pandemic.

Local

For the past several years, we've seen people relocate from areas with a high cost of living toward more affordable areas. In general, this means moving from high-density locations to more sprawling pastures in the southeast and southwest. This trend grew during the pandemic, as people sought to escape urban areas (where the cost of living and COVID rates were high) to lower density places. Since people in rural areas are significantly more likely to be introverted than those in urban areas, pandemic movers were thus more likely to move culturally introverted places.

0.25 — 0.56   Insufficient Sample Size
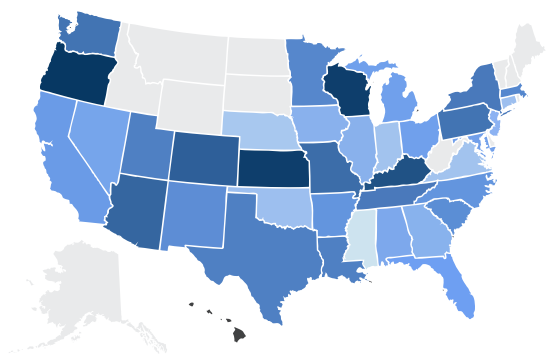
Rate of Introversion by Locality

46% Urban
42% Suburban
38% Rural
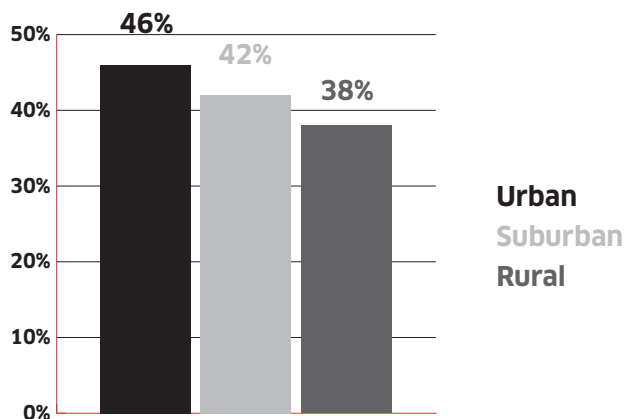
People are also choosing introverted homes: The rise of tiny homes, architectural attempts to cut out the clutter of social living, where entertaining is impossible, and nomadic #VanLife, have illuminated a desire to move away from crowded places toward more minimalistic settings.more nomadic, isolated residential set-ups.

Pandemic isolation is reinforcing.

The cumulative effect of 2 ½ years of the pandemic has been that Americans have become more introverted. Roughly ¼ of our respondents described becoming more introverted over the course of the last couple of years, and an astonishingly small percentage said the opposite was true. As you might imagine, the reason for the change varies between the personality traits.

"Me and my social skills"

March 2020

March 2021

"I think seeing less people and working from home has made me become slightly more awkward and reserved."

-Female, extrovert, age 29

22%

of introverts say they became more introverted throughout the pandemic.

28%

of extroverts say they became more introverted throughout the pandemic.

Introverts
Introverted respondents were significantly more likely to say that the pandemic-induced lifestyle changes helped level the playing field for them at home and at work. They described being able to interact with friends and coworkers in ways that were more comfortable to them. Particularly for those who ascribed shyness to their introversion, virtual and smaller interactions helped them feel less like wallflowers.

Extroverts
For extroverts, a sense of inertia was a common refrain: The longer they spent away from social activities, the harder it was to reenter social life. Years of limited social interaction made them feel rusty on the basics of in-person interaction, and more likely to feel the same kind of social reticence introverts did prior to the pandemic. Despite no remaining pandemic restrictions in the US, extroverts in our survey still reported spending more time in their homes than in 2019. Social discomfort was up across the board, as even the most gregarious reported feeling a little out of practice socializing.

Be it introverts, extroverts or those in between, these personality types should be top of mind for brands all the time.

K-pop band BTS has truly embraced the phygital needs of its fan base. In a recent concert, it displayed an array of live video feeds from fans around the world, allowing for people to experience a live performance from the comfort of their own homes.

Recognition

Whether they realize it or not, brands are symbiotic with an audience of introverts, extroverts and ambiverts. How they approach this melting pot of personality types is implicit toward business growth and optimum messaging. When identifying current and future growth audiences, personality type, along with demographics and psychographics, should become a standard filter.

Regionality

Our local strategies already taken into consideration the ethnic, linguistic, and cultural differences of each market. Now is the time to add personality type to the mix. Similar to how we incorporate in-language messaging, the markets we choose to prioritize and how we communicate with them must address the needs and nuances of introverts.

Channel

For introverts and extroverts alike, there were some social activities that weren't conducive to in-person interaction. For example, one respondent said first dates online felt much safer than ones in person and planned on Zoom-ing first dates indefinitely. As we recalibrate our balance of in-person and virtual interactions, we have the opportunity to be intentional about which activities merit old-school, in-person communication and which ones don't. The future is phygital—a prudent balance of in-person and virtual.

Brands should:

Consider the unique needs of each personality type and be intentional about IRL vs. virtual activations.
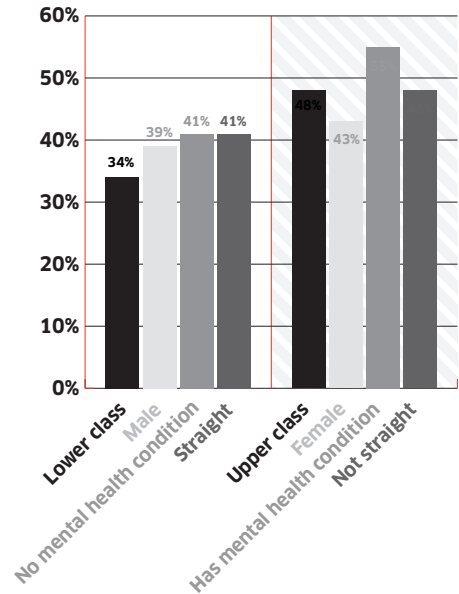
Language

We're redefining introversion in real time. Psychologists define "introversion" based on whether or not you derive energy from being alone. As more and more Americans call themselves introverts, what it means to be an introvert is also expanding.

"I enjoy being with people, but I'm usually the most quiet one of all."

-Female, Introvert, age 32

"I can have a difficult time feeling big emotions of pain or excitement for someone else."

-Male, Introvert, age 39

Chart showing percentages by segment: Lower class 34%, Male 39%, No mental health condition 41%, Straight 41%, Upper class 48%, Female 43%, Has mental health condition 55%, Not straight 48%.

It ain't easy being an introvert.

The term "introvert" has come evolved considerably since its Jungian origins in the early 1900s. In the last few years, we've seen its definition expand to include three main themes:

Isolation
Likely because they begin with the same vowel and end with the same consonant, people often use "isolation" and "introversion" interchangeably. But one can feel isolated without being introverted, and vice versa. What's more, many Americans are prone to introversion simply because they're members of segments often marginalized and even disdained by society. Specifically, people who are LGBTQ+, have mental health issues, are female, and are lower income.

Low Engagement
For many, shyness and quietness are synonymous with introversion. Feeling like a "fly on the wall" or a "wallflower" was a common refrain throughout our study. Indeed, unless there is a high level of comfort with a situation, many introverts found it difficult to make their presence known in conversations as easily as their extroverted counterparts. Complicating matters is that in addition to how often and loudly you speak, there are subtle ways in which extroverts appear to own conversations. Body language, eye contact, and gesticulation can make extroverts seem louder even when they're not.

Trouble Connecting
Many introverts find it challenging to understand the emotional cues of others, and others errantly assume introverts have lackluster social and communication skills. There's some self-fulfilling prophecy here, too, as sometimes difficulty relating with others leads to social discomfort and, eventually, introversion. We see ripple effects of this association in politics, brand, and even family relationships. Reality, however, is more complicated, as we found whether you think you understand others is quite different than if you actually do.
Some introverts noted that they are valued for their ability to connect with others, and they are known as good listeners in their friend groups.

Context can make someone more extroverted.

This-versus-that, one-or-the-other are, for better or for worse, ways we like to frame things. It's as simple as it is incomplete. The reality is between the extremes lies a lot a gray area, and that include three in 10 respondents who identify as ambiverts, or those who consider themselves neither personality type.

What's more, there's a level of flexibility among those who call themselves introverts or extroverts, as both types are largely a function of context.

Extroversion is usually synonymous with social comfort, but our research found the opposite is also true: People are more extroverted in places where they are more comfortable. Even those who describe themselves as extreme introverts said they felt more comfortable (and were less depleted) when amongst small groups of people they know well, than they are making small talk with strangers.

Dr. Lawes describes this as follows: "Extroversion and introversion change between situations depending on who else is there, how far they are trusted, and to what degree they are comfortable to be around. Consumers are likely to behave in an extroverted manner when they are comfortable within a circle of trusted people. They become outgoing and willing to stand up for their beliefs. But when they are uncertain of those around them, they become more introverted. They don't say what they think, and they use coping mechanisms to control their emotions and avoid conflict."

"It really depends on the situation. If I am in a large gathering with people I don't know, I may be something of an introvert, but if I am with friends, I might be more extroverted."

-Male, Ambivert, Age 26

"My personality is a balance of both, sometimes based on the environment I'm in, who I'm with, how I am feeling and other environmental and internal cues."

-Female, Ambivert, Age 69

Comfort Level in Interacting with People

|	Extrovert	Ambivert	Introvert
Low	5%	9%	51%
Medium	15%	46%	33%
High	80%	46%	16%

High
Medium
Low
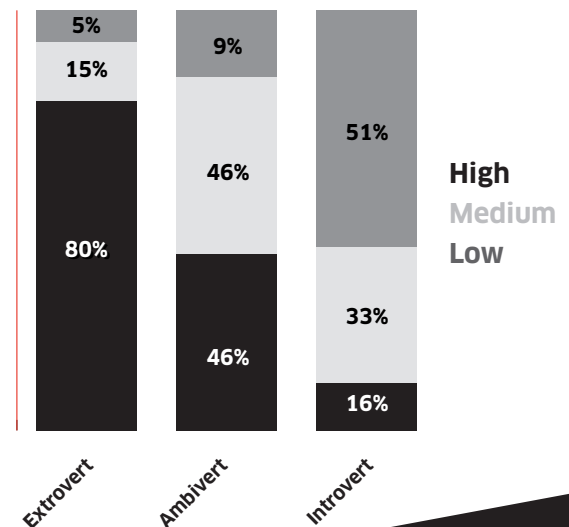
Mental health is often conflated with introversion.

Over the last few decades, we've been exposed to more diverse personality types and experiences in the media we consume. Dr. Lawes notes, "It's fashionable now to recognize superpowers such as having ADHD or being 'on the spectrum.' A shift of perspective in which these aren't disabilities or defects but talents." This new perspective has gone a long way toward helping us redefine what it means to be introverted.
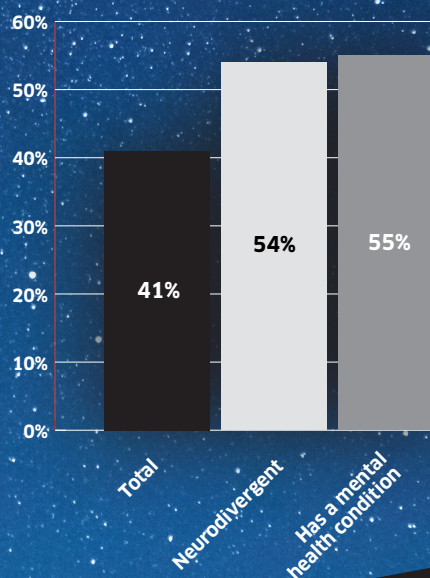
In some ways, this makes sense. In our study, one in 10 people (9%) reported being neurodivergent, and another quarter (23%) said they had social anxiety or depression. These respondents were 32% and 34% more likely, respectively, to identify as introverts than others. But while they are related, neurodivergence, anxiety, and depression are specific medical diagnoses with very different needs, not preferences. As we have collapsed so many different conditions into the term "introvert," we've inadvertently expanded the definitions of these conditions as well. Some, for example, quick to use the word acronym "OCD," really just means the person is "persnickety." The same goes for ADHD, a diagnosis that is only earned if the individual has a litany of symptoms; often, we errantly use it or ADD to simply mean "being distracted."

"I am very socially awkward, and have trouble talking to others. I spend a lot of time alone."

-Female, Introvert, Age 42
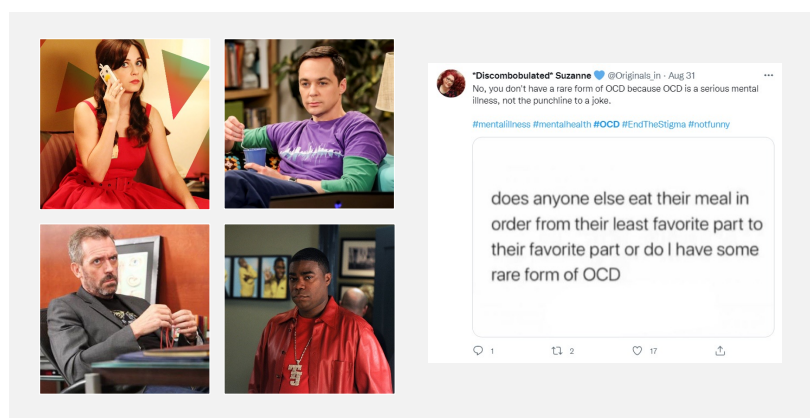
What we saw in our study is that conflating these conditions with introversion haphazardly helps people explain away completely normal and common feelings of loneliness, social discomfort and awkwardness. But for the millions of Americans who deal with these conditions, their redefinition of introversion does a disservice to those who have specific physical and emotional needs. For neurodivergent folks, for example, quiet and alone time can be a vital medical need, not a preference. It can also divert resources and advocacy away from the people who most acutely need them.

	Total	Neurodivergent	Has a mental health condition
	41%	54%	55%

There's room for brands to be careful and prescriptive.

Tone and Imagery

There are times when introversion succumbs to isolation, two words that, too, are often used synonymously, although it's really one metastasizing the other. Should this occur mental health issues, radicalization and addiction are just a few of the repercussions. And because so much of the world can't distinguish between the two, it makes it that much harder for these personality types to have their needs met. Brands will earn more goodwill from introverts if they're met with empathy, patience and personalization, especially among those dangerously close to falling into isolation.

Avenue

Brands seeking to motivate introverts should fine-tune activations so they feel intimate and familiar. Doing this will promote a higher level of trust and comfort and allow introverts to become more extroverted. Providing breakout spaces and opportunities to partially engage can give introverts enough breathing room to keep chugging along the beaten path.

Brands should:

Avoid language and imagery that is alienating to introverts and provide transitional experiences to ease introverts seeking to engage into approachable social interaction.
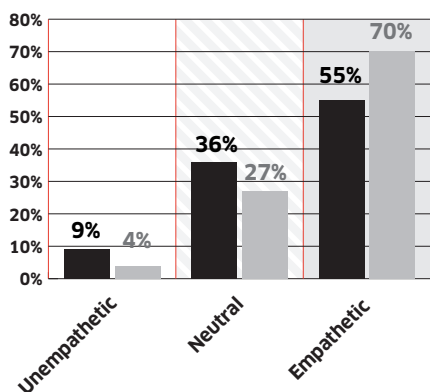
Experience

A common stereotype we sought to test was that introverts don't work and play well with others. Introversion and isolation are often associated with petulance, closed-mindedness, and a lower EQ. These assumptions have created a shortcut for companies, friend groups and others, allowing them to believe they're short on leadership and interpersonal skills.

While our study found that extroverted people were much more likely to see themselves as empathetic, introverted people were much less likely to think others were empathetic. In other words, introverts were less likely to see anyone as empathetic. At the same time, introverts and extroverts alike both felt being empathetic for empathy's sake was more important than adhering to empathetic social norms.
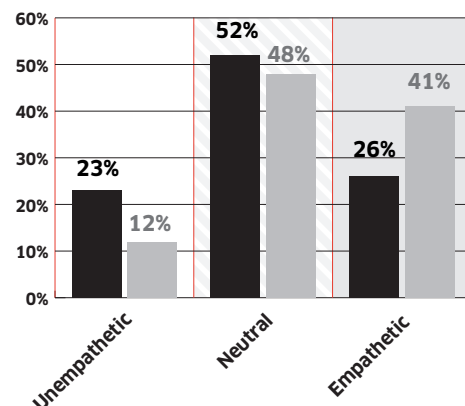
Furthermore, more alone time can, in fact, make people more understanding of others. Two in five (39%) of our extroverted respondents said the forced seclusion of the pandemic has made them more empathetic, compared to just three in 10 (29%) introverts.

Instead of extroverts having a different level of empathy, our data suggested they simply have a different definition of empathy, and perhaps also a different way of judging others and themselves. Contrary to popular belief, our study's introverts often found that they were able to be more empathetic because they were better listeners.

How people see themselves:

- Unempathetic: Introverted 9%, Extroverted 4%
- Neutral: Introverted 36%, Extroverted 27%
- Empathetic: Introverted 55%, Extroverted 70%

Introverted
Extroverted

How people see others:

- Unempathetic: Introverted 23%, Extroverted 12%
- Neutral: Introverted 52%, Extroverted 48%
- Empathetic: Introverted 26%, Extroverted 41%

When physically with people (e.g. parties, gatherings)

	Introvert	Ambivert	Extrovert
I hate it. It makes me uncomfortable	18%	44%	73%
Neutral	26%	37%	20%
I love it. I feel in my element.	57%	20%	8%
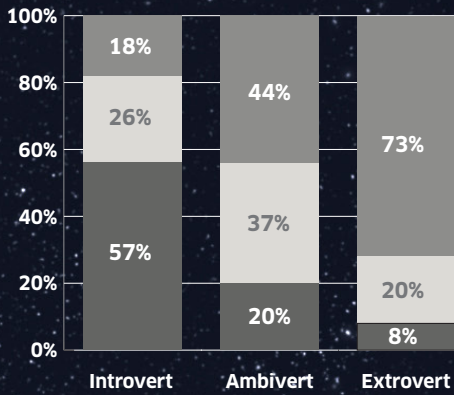
When at work/in the office (e.g. meetings, networking, presenting)

	Introvert	Ambivert	Extrovert
I hate it. It makes me uncomfortable	14%	30%	58%
Neutral	33%	46%	33%
I love it. I feel in my element.	53%	24%	9%
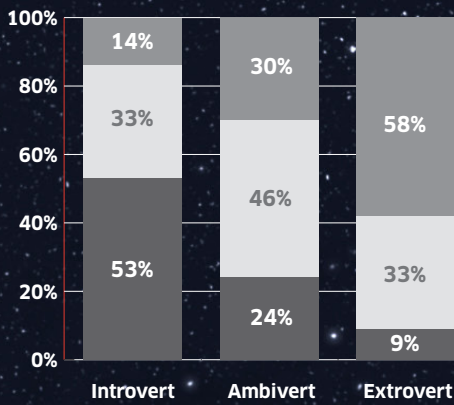
When scrolling online/looking at friends' feeds

	Introvert	Ambivert	Extrovert
I hate it. It makes me uncomfortable	18%	23%	45%
Neutral	60%	65%	48%
I love it. I feel in my element.	23%	12%	7%

Legend:
- ▉ I hate it. It makes me uncomfortable
- ▉ Neutral
- ▉ I love it. I feel in my element.
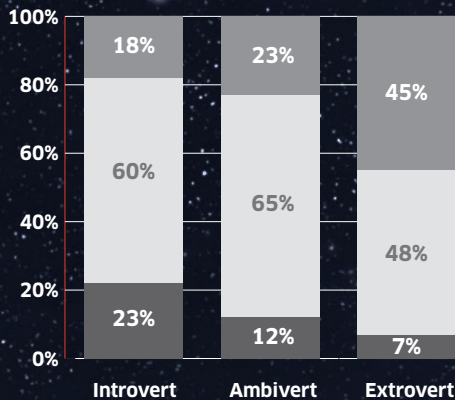
Introverts want to engage—from a distance.

Some people believe introverts are synonymous with recluses, and you can usually expect some sort of Howard Hughes reference amid the misnomer. While a Venn diagram would certainly show some overlap, the reality is introverts want to interact with others, albeit in different ways than extroverts. Our respondents described greater willingness to engage when proximity to others was off the table. For example, they are more likely to learn about things from reading and consuming media rather than having a direct connection with people in their lives. Furthermore, they are significantly more comfortable in online environments than face-to-face. This extends even to family and friends, whom introverts actively are more likely to actively avoid in impromptu settings. Dr. Lawes adds, " Introverted individuals find it far easier to be themselves online than in person. Being able to hide behind a screen and consider responses—unlike in real life—makes these individuals feel more confident and comfortable."

Even in anonymous online settings, introverts stay clear from conflict.

Keeping distances is perhaps part of introverts' need to avoid confrontation. Despite having greater comfort online, our data showed introverts were 2 ½ times more likely to block or unfollow people they disagreed with online, and less than half as likely to engage in conversation in any way. Even with friends and family, they described significantly less desire to engage in debate. They were 47% more likely than extroverts to say they would politely nod but not take the bait when family or friends espoused views they disagreed with.

"Introverts don't like face-to-face confrontations, so when hot topics come up, they suppress their opinions. When dinner is over and they can get online, a virtual friendship group awaits them, often with clear group values and ideals where they feel more comfortable talking. But for extroverts, life online is not only about echo chamber friendship groups, but also about opportunities to interact with people who disagree with you and suffer no real consequences for telling them what you think."

-Dr. Rachel Lawes

Being introverts' true selves isn't always advantageous to brands, but where there's a will, there's a way.

Metrics

No two people interpret tone, imagery or diction the same way, so all brands can hope for is getting most people to interpret them in a positive way. If only it were that easy, said brand managers everywhere. For trying to reach introverts, brands should begin on digital channels and engagement methods that rule out active participation.

Corporate Activism

Extroverts look for crystal-clear expressions of empathy—both from themselves and brands. Introverts, meanwhile, question their empathy, and are likely to put more stock in unheralded acts of charity. Given introverts' skepticism toward good deeds, brands will have to work overtime to message their CSR efforts to these audiences. Introverts will want to see proof that a brand's altruism for the causes that matter to them is paying dividends.

Algorithms

Not all introverts are hermits, but they they are less influenced by word of mouth and are less likely to take a stand online and with family and friends. This has a big impact on influence dynamics, making it harder to reach them and for them to bring others into the conversation. It's entirely possible we might be over- or under-estimating reach and conversion. We'll need to rethink metrics like reach and create new algorithms to truly reflect how brand information is disseminating among introverts.
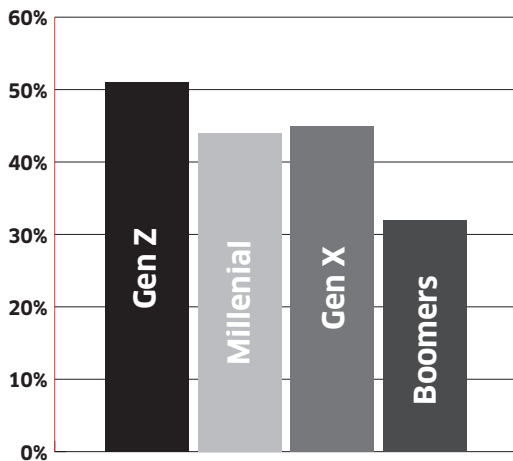
Brands should:

Recalibrate metrics for reach to account for introverted models of information dissemination and take an impact-focused approach to CSR messaging.

Brands

We've seen the future of marketing and it includes introversion. As more and more Americans identify as introverts, these solitary types will expect more from brands. An inclusive approach will require adapting to not just their needs, but to others elsewhere on the spectrum.

Rate of introversion by generation

"I don't get invited to parties, and people consider me intimidating. It's really unfortunate, because I don't mean to be mean or unfun, I just have different priorities and am tired of explaining myself."

-Female, introvert, age 20

"It really depends on the situation. If I am in a large gathering with people I don't know, I may be something of an introvert, but if I am with friends, I might be more extroverted."

-Male, Ambivert, Age 26

Having grown up in a world where texting is synonymous with talking and you're able to play Call of Duty with peers several continents away, it's little wonder Gen Z is more introverted than other generations.

Given how many members of Gen Z are introverts, the generation's attitudes in other subjects are making their presence felt when it comes to introversion. And, steadily, we have seen this generation's influencer culture test the boundary between personality and identity.

Today's young adults are significantly more likely than prior generations to aspire to be entrepreneurs and influencers. Of course, no previous generation even knew what an "influencer" was at Gen Z's current life stage. These non-traditional, individualistic career aspirations make developing a personal brand a critical need. Gen Z's success, in fact, can hinge on a carefully constructed persona. Your aesthetic choices, hobbies, and artistic taste all have intense bearing on your social (and, eventually, financial) worth. And, in a very real way for teens, personal branding isn't just about shaping an identity but using it to make a living and finding purpose in life.

We have tracked this blurring between personality and identity along gender lines for some time. For the oldest Millennials and their predecessors, gender identity falls along largely body-identity lines–some sort of existential understanding of being female, male, or neither. For younger individuals, elements of personality become integral components. In other words, how you express that gender identity becomes part of the gender definition itself, which makes the definition (as well as many Gen Z constituents) gender fluid.
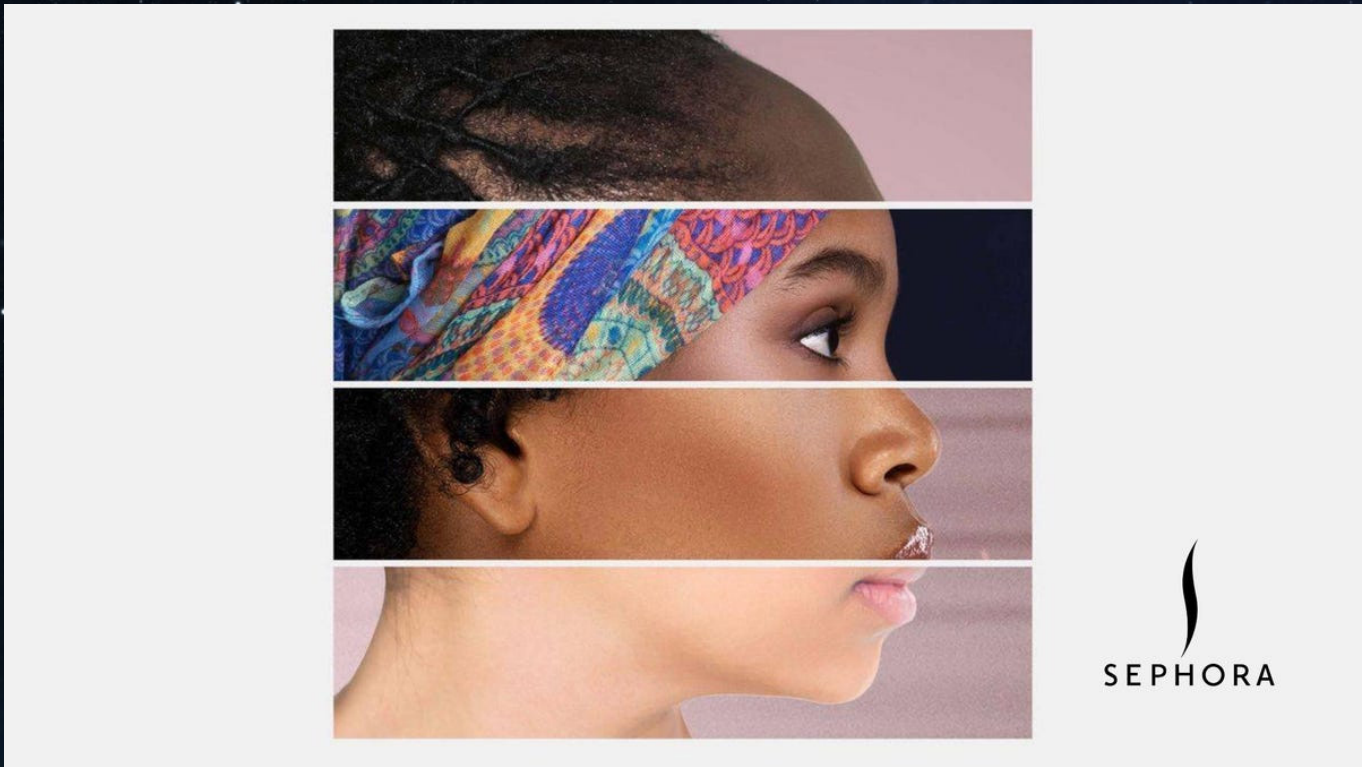
With this line between personality and identity more and more unclear, suddenly introversion becomes not just an adaptable personality feature, but a core element of one's identity that requires special consideration.

Introverts want to make a difference, differently.

+16%
social media scrolling

+12%
streaming services

+9%
YouTube

-24%
word of mouth from family/friends

-30%
directly through brand website

Brand Discovery
While the degree of social interaction doesn't necessarily define introversion, the fact remains that introverts spend less time on average socializing. This goes for interpersonal relationships and for their engagement with brands. As a result, introverted respondents in our survey were significantly less likely to learn about brands by going directly to the source and were more likely to rely on indirect methods. Overall, they would rather read the opinions of strangers online than talk to someone they know.

CSR Messaging
One of the starkest differences between introverts and extroverts is what they expect ethically from brands. While both introverts and extroverts said they strongly believe in at least one social cause, extroverts were more likely to believe brands should be more socially responsible and to say they consciously try to purchase brands that adhere to their personal values. While this doesn't necessarily mean that extroverts care more about brands supporting causes, they are influenced more by messaging to this effect. This suggests that CSR-related messaging and initiatives will connect more with extroverts.

Even in their most antisocial moments, introverts are no longer relegated to solitude, with spaces and products that give them the respite and separation they need to recharge.

Behavioral

The stereotype of a shut-in no longer fits the vast majority of self-described introverts, many of whom walk, talk, listen and socialize just anyone else. It's a fool's errand to rely on how often people socially engage if you're trying to spot the introvert. Instead, we should identify places they choose to go (e.g. dive bars vs. clubs) or products and services they buy (e.g. movie tickets vs. streaming purchases).

Motivational

There is no archetypical introvert or extrovert, even if keen observation can help us make educated assumptions towards identification. Introversion is often situational, and perhaps there's no better example of that than when we watched extroverts become introverts during the throes of the pandemic. At Starcom, we use motivations as a way into connecting people and brands. Our proprietary motivational framework, mapped to Epsilon IDs, allows us to not only understand people and craft relevant messages, but also to find those motivations in the wild.

Brands should:

Consider nuances in where and why people engage, not just how often, in order to find and reach introverts.

The Future

It's clear the pandemic didn't just temporarily alter behaviors or preferences; it merely accelerated the inevitable shift toward a more remote and isolated world. And only now it's apparent how ill-equipped we were to deal with the fallout. The future must not be a gentle coaxing of people back to the old-world order, but rather the creation of new brand experiences that are cognizant of and respectful toward personality type from the outset. But while the task at hand feels daunting, a few simple steps can help brands respond to this shift:

Learn

Evaluate your brand's current distribution of personality type. Determine how this compares across your category and whether this mix of introverts and extroverts is right for your brand.

Assess

Consider the experience your brand currently provides. Is there enough flexibility in the experience to facilitate all personality types? Given your audience profile, is your brand experience more heavily favoring one end of the spectrum or another?

Design

Keep personality type at the core of your creative when developing messaging, imagery, and activations to better respond to your audience.

Measure

Go beyond stereotype to find behavioral and motivational signals to identify introverts in the wild. Create measurement plans for both introverts and extroverts to understand your resonance and progress against both groups.