

Marketing in a crisis

The calm before the (next) storm



UK Report

1 July 2020

Lockdown life: adaptation, but not contentment

Has anyone else worked out how long we've been in lockdown and been immediately shocked at how long it was?

The answer? Two months.

That's two months of home schooling, trying and failing to make bread and either your hair is now pretty unruly, or you've taken the plunge and attempted to tame it with the kitchen scissors.

Now whether you've got an even cut or not, it's fair to say we've now all adapted to our current restrictions and routines. Our latest wave of research, run in the eighth week of lockdown, shows exactly that - that the British public's yearning for our old way of life is settling to pre-lockdown levels.

It appears that 'peak' lockdown was during the second week, when most (68%) felt that their way of life had been heavily disrupted. Fast-forward to the fourth week and this belief had declined to 61%. Eight weeks in, it remains steady at 60%.

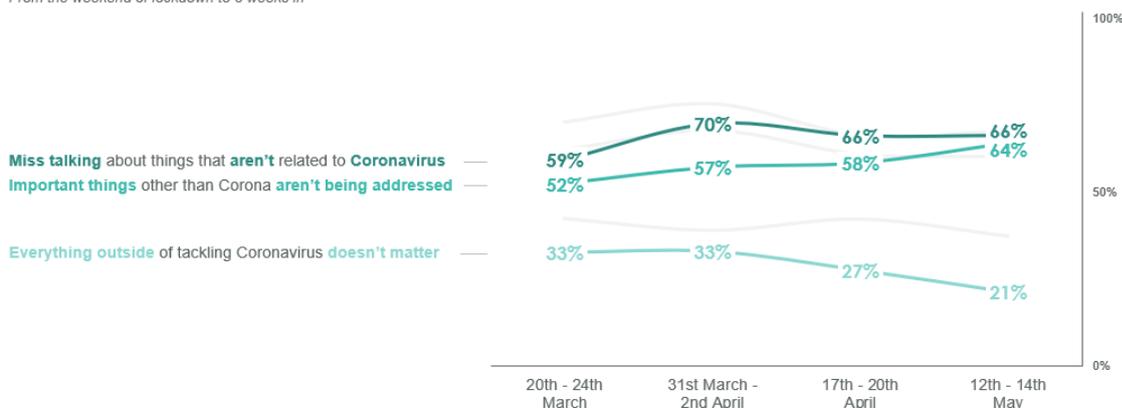
So, although many are still feeling the impact of that disruption in one way or another, people have acclimatised. The reticence and caution shown by Opinium's [political polling](#) about lifting lockdown and re-opening the hospitality sector is a prime example of this: we've only just got used to the current situation, no wonder we don't want it to change again.

This adaptation and the resulting fragile sense of stability has meant people's minds are increasingly turning to things other than Coronavirus.

The notion that important things other than Coronavirus aren't being addressed has increased considerably from 52% to 64%, just as the idea that everything outside of tackling Coronavirus doesn't matter has decreased from a third to just over 2-in-10.

People increasingly have other things on their mind

To what extent do you agree with these statements? NET: Agree
From the weekend of lockdown to 8 weeks in



To what extent do you disagree or agree with the following statements?
c.2,000 UK adults per wave

Along with consistently high levels of boredom and an ever-increasing desire for escapism (45% of people now admit to actively avoiding the news!), this is the first of many signals that illustrate that it's time for brands to start re-activating communications that aren't related to Coronavirus.

The goldilocks zone

During the first week of lockdown the UK public wanted to hear either the same, or more, from brands regardless of the category they operated in. Despite reports of pulled adverts and frozen marketing budgets, 'going dark' was not what consumers wanted.

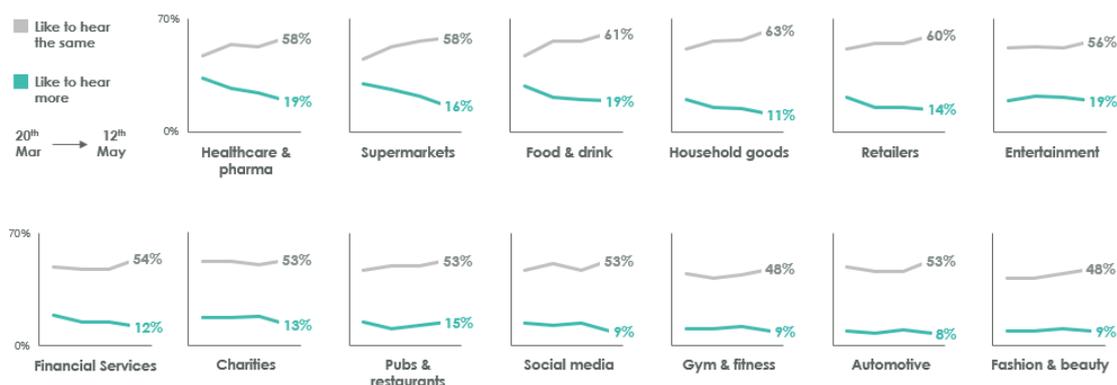
Eight weeks in consumers still want to hear from brands, but **the time for crisis comms is over**.

As the UK moves further further away from the initial panic, the gap between the public's desire to hear more from brands and their desire to hear the same is growing. Consumers no longer need or want an email from the CEO detailing their business continuity plan, to be informed of the measures they are putting in place to deal with this unprecedented situation, or to detail each business' individual response.

Eight weeks in, the public assume that brands have got this.

People still want to hear the same or more from sectors

Would you like to hear more or less from these types of company?
From the weekend of lockdown to 8 weeks in



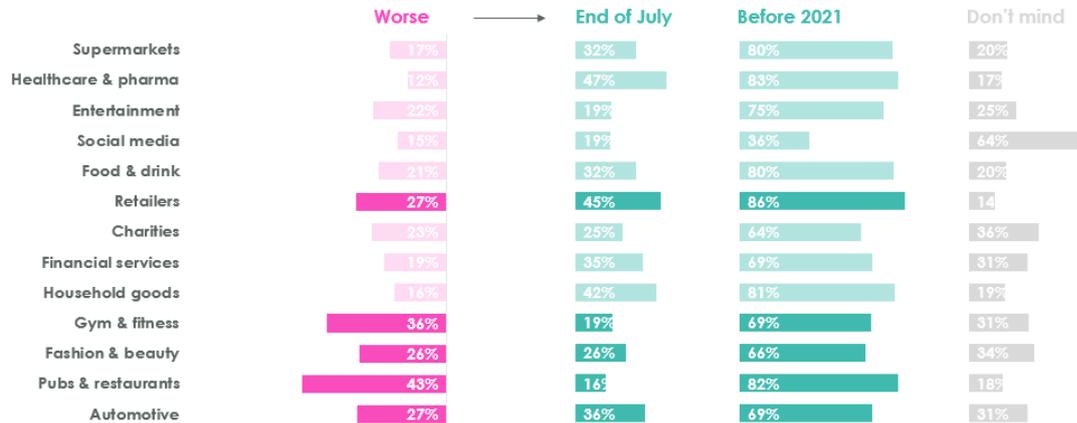
And would you like to hear more or less from these types of company at this current time?
c.2,000 UK adults per wave



Yes, these are unprecedented times, and yes consumers are aware of the issues brands and businesses are facing, but expectations of functionality and service remain broadly on par with pre-pandemic levels. We may 'all be in this together', but individualistic desires and needs still come first.

Some sectors are expected to bounce back in the next few months, although others could take longer

When do you expect these sectors to return to their usual levels of service / functionality?
12th – 15th May (8th week of lockdown)



When do you expect these sectors to return to their usual levels of service / functionality?
UK adults who think each sector is worse c.230 – c.800



Sectors such as Pubs & restaurants and Gyms & fitness are, of course, the exception. The ‘normal’ functionality of these sectors is intrinsically linked in mind of the public with the removal of social distancing. Whilst the likelihood of this occurring before July is recognised by consumers, an alternative future currently seems hard to imagine with 82% stating that they believe that Pubs & restaurants will be returning to their usual levels of service by the end of the year.

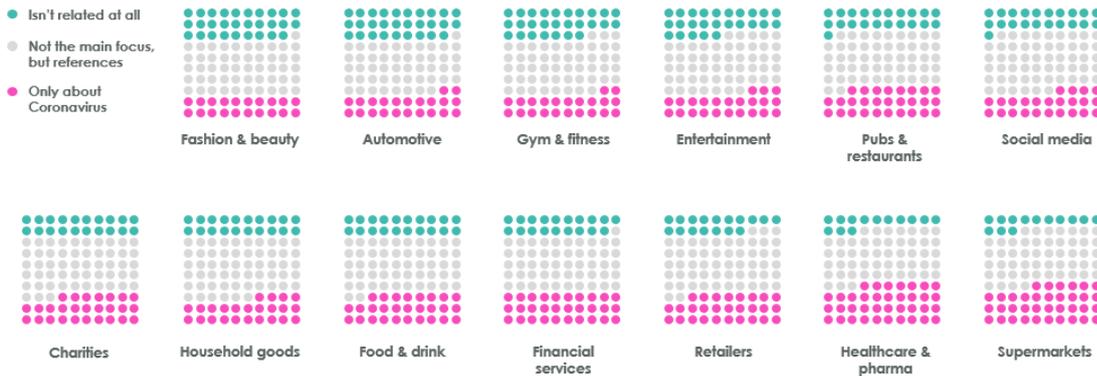
Turning off and tuning in

Whether this is realistic or not, consumers are moving past the pandemic and expect to see brands move with them in their communications. Regardless of sector, the majority of UK adults do not want the main focus of a brand’s advertising to be about lockdown, social distancing or responding to Coronavirus.

Reference the situation, absolutely, but don’t let it define the brand or the message.

The main focus of advertising should not be about lockdown, social distancing or responding to Coronavirus

Would you like advertising to be about the current situation (e.g. lockdown, social distancing or responding to Coronavirus)?
12th – 15th May (8th week of lockdown)



Thinking about communications from brands, who would you like to hear from at this time?
2004 UK adults

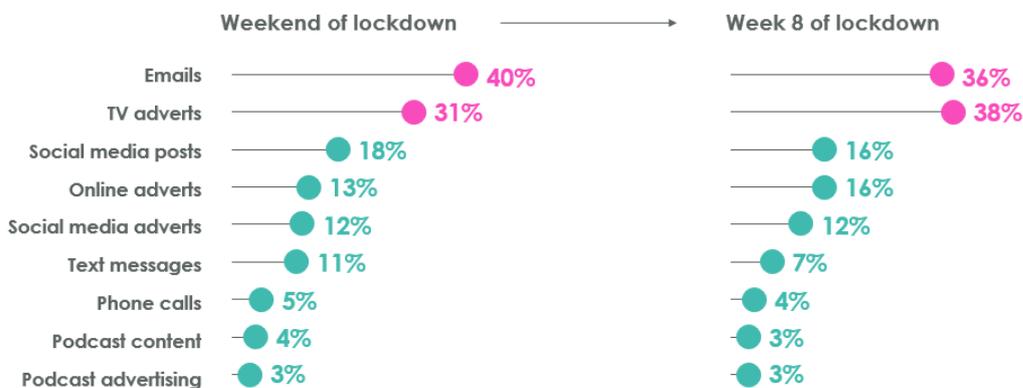


But in what format does the public want these adverts to be shown?

In the first week of lockdown, despite the barrage of emails from CEO, two-fifths of the population wanted brands to do just that. Eight weeks in, that number remains impressively high at just over a third (36%), but with 42% of the population watching more live TV than usual, it's unsurprising that TV advertising has made a resurgence. Currently the preferred channel for communications from brands across every age group, TV advertising is no longer one for the over 50s and suddenly back in fashion.

Mass communication is back in fashion

How would you like to hear from brands?
From the weekend of lockdown to 8 weeks in



What are your preferred channels for brands to advertise and communicate to you while you have to stay home?
c.2,000 UK adults per wave

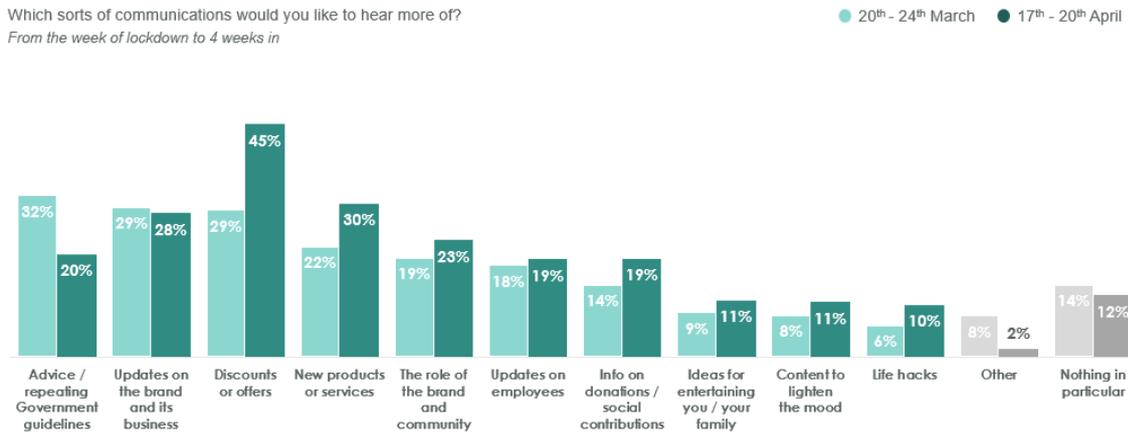


Back to business

Whilst the gradual loosening of the lockdown may not feel like a return to pre-pandemic life, most consumers are wearying of the need for brands to repeat Government guidelines and advice. The worsening economic situation coupled with a sense of fatigue has seen demand for discounts and offers, as well as new products and services, rise across all sectors. For Supermarkets, (the emblem of calm, clear and concise communication during the first few weeks of lockdown) this transition is particularly stark, representing a shift back to demand for the content traditionally associated with the sector.

People now want to hear about discounts, offers and new products from Supermarkets

Which sorts of communications would you like to hear more of?
 From the week of lockdown to 4 weeks in



Which sorts of communications would you like to hear more of from these types of brands?
 Base: Those who would like to hear more from companies in this sector- 447



A softening on tone

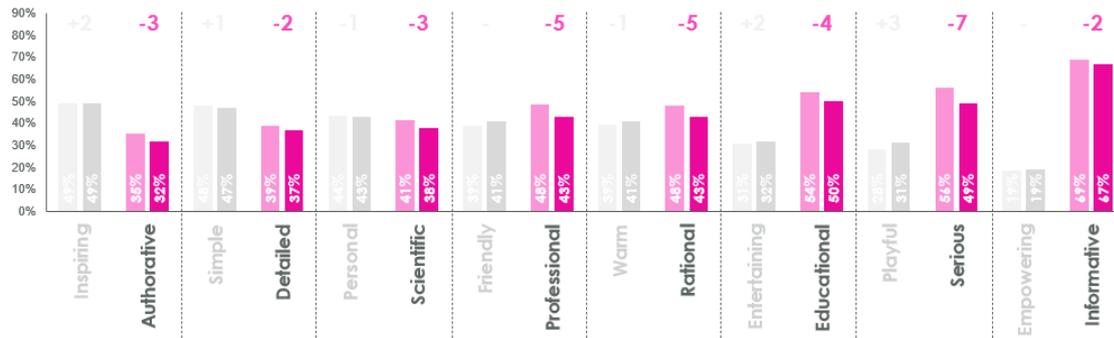
But it's not just the content of the communication that has shifted, it's also the tone of that content.

Whilst at an overall level, consumers are still seeking communications from brands that are informative (67%), educational (50%), serious (49%), but also inspiring (49%), there have been significant shifts away from desiring a more rational tone of voice.

The need for crisis comms is fading away

What tone of voice do consumers want to hear?
From the 2nd week of lockdown to 8 weeks in

● 31st March – 2nd April ● 12th – 15th May



When thinking about the content of communications from companies in the [X] sector, would you like it to be...
2,004 UK adults



As you would expect, the extent to which these shifts manifest themselves across sectors is extensive. In fact, they are almost wholly dictated by the type of communications brands in each sector put out anyway.

Those essential services sectors, which were in the eye of the storm eight weeks ago, for example, are beginning to have permission to go back to their old pre-pandemic selves.

A perfect illustration of this is, again, supermarkets, which were looked to for authoritative, professional and serious communications in the second week of lockdown. Yet now, people want to receive content that is more friendly than professional, and which can be increasingly playful.

Now that supermarket stocks are returning to normal, people are beginning to look for more light-hearted comms again

What tone of voice do consumers want to hear from supermarket brands?
From the 2nd week of lockdown to 8 weeks in

● 31st March – 2nd April ● 12th – 15th May



When thinking about the content of communications from companies in the [X] sector, would you like it to be...
c.450 UK adults



The end isn't in sight

A return to normality then for brands? Not quite.

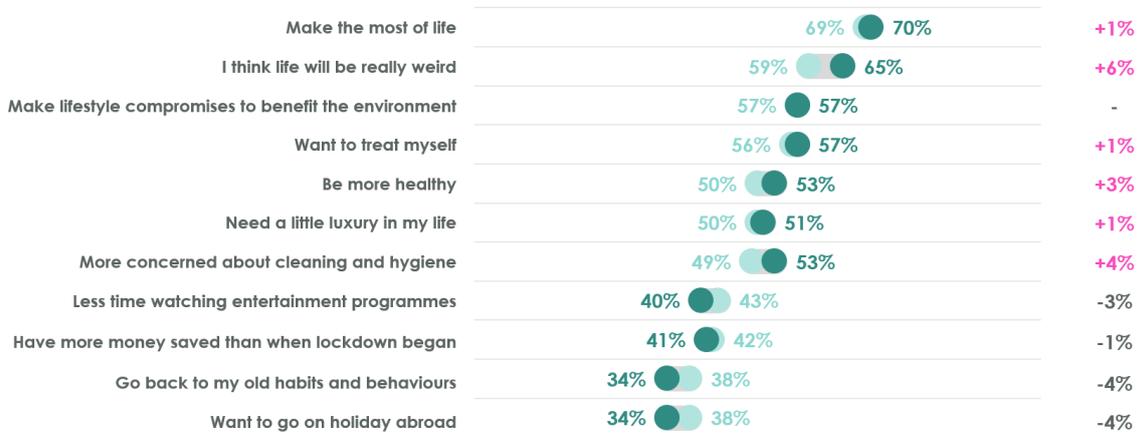
With no prospect of a vaccine or end to social distancing on the immediate horizon, over half (58%) of consumers are feeling apprehensive about the future, with 65% stating that they think 'life will be really weird' after lockdown has been lifted (+6% compared to week 4). As concerns about cleaning and hygiene grow, activities that compromise social distancing may be missed, but are not in demand. Only 34% expect to go back to their old habits and behaviours and just under two-thirds of us don't want to go on holiday abroad and go back. At least not *just* yet.

But post-lockdown isn't a bleak, dystopian landscape. Whilst the public may not yet be able to envisage a world which is radically different to the one they currently inhabit, over half are willing to make lifestyle compromises to benefit the environment (57%) and 70% state that they are keen to make the most of life – whatever that may be.

Normality is increasingly slipping away and returning to old behaviours is less likely as time goes on

What are people's predicted attitudes and behaviours post-lockdown? NET Agree
From the 4th week of lockdown to 8 weeks in

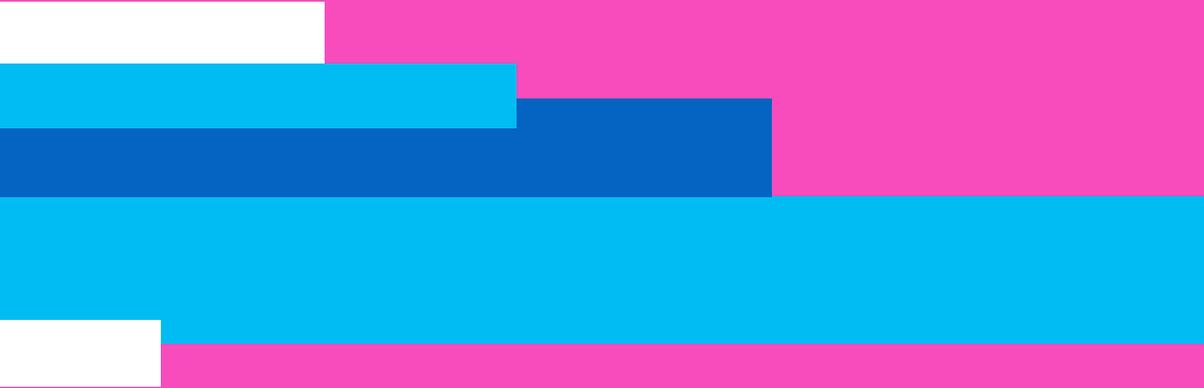
● 17th - 20th April ● 12th - 15th May



To what extent do you agree or disagree with the following statements?
c.2000 UK adults per wave

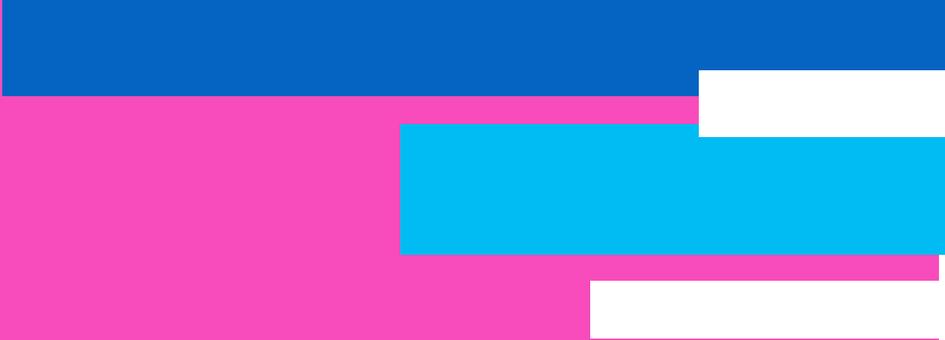
Instead the threat for both consumers, and therefore brands, is the impending financial downturn. With nearly a quarter of the UK experiencing an average decrease of 34% of their disposable income whilst simultaneously having more time available to consider what they are buying, over a third of consumers are tightening their belts and returning to the brands and products that they know and trust. With clouds growing on the horizon, it may not seem like the calm before the storm, but now is time for brands and business to communicate with consumers and build trust and loyalty. Before it really hits.

If you'd like to know more or would like a personal briefing of the results for you or your team, do get in touch: alexanightingale@opinium.com



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