

# Marketing in a crisis

## Brands: it's time to find your voice



UK Report

9 April 2020

## Living la vida lockdown

In our last wave of research, people were sharing their opinions as the UK wide lockdown came into effect. Now, over a week has passed and the full impact of the government’s stay at home messaging is beginning to bite, with people working through the initial shock and starting to create their new normal.

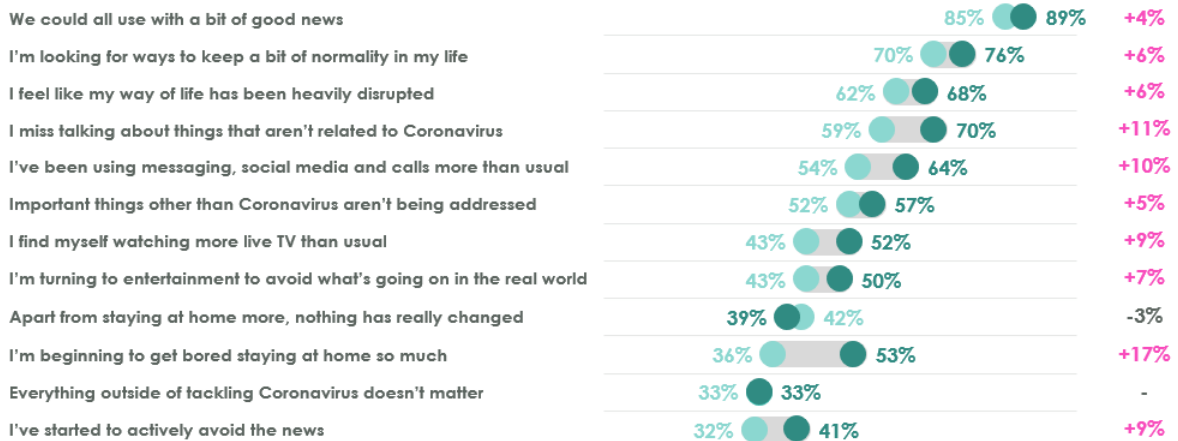
For many, fatigue is beginning to set in, with an 11-point increase in people saying that they miss talking about things that aren’t related to Coronavirus. Amazingly, and potentially linked to a rise in anxiety surrounding the pandemic, just over 4-in-10 are now starting to actively avoid the news, up from 32%.

The largest increase however, is in the public feeling bored at home, which has rocketed from 36% to 53%.

## Changing perceptions over time

To what extent do you agree with these statements? NET: Agree

● 20<sup>th</sup> - 24<sup>th</sup> March ● 31<sup>st</sup> March – 2<sup>nd</sup> April



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

These shifts indicate a nation coming quickly to terms with what a lockdown means. Early indicators are that it has hot-housed emotions such as worry and boredom. It is little surprise then that we’ve also seen a significant increase in people trying to escape the current reality by seeking solace through loved ones, watching more live TV across all age groups, and embracing social media to avoid the current crisis.

## Can you see me? The rise of vanishing brands

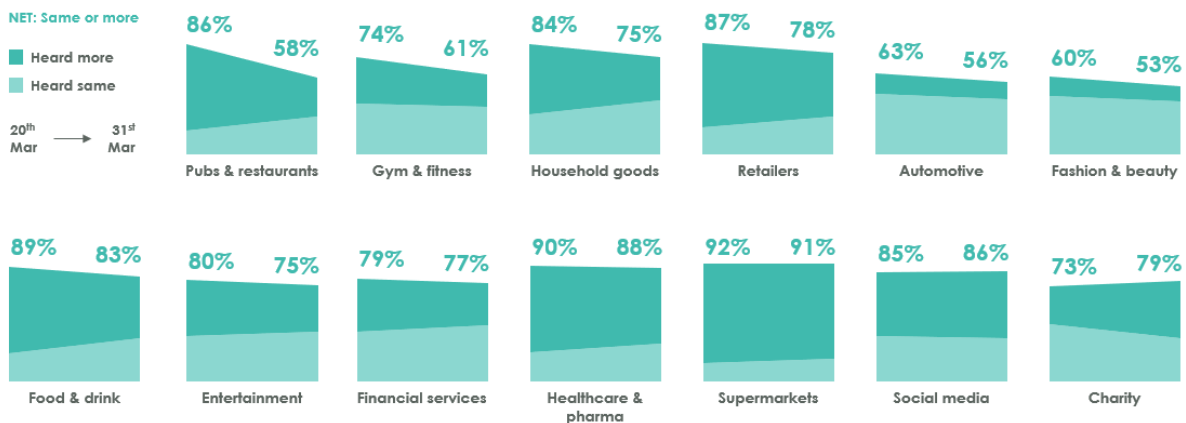
As people continue to adapt to their new way of life, including the new limits and boundaries imposed upon them, they are looking to brands to see where they either do, or don't, fit into this new form of existence.

During this time, it's likely that those sectors most impacted by the pandemic will fall out of consumers' minds. That is, unless brands within them choose to buck the trend and use continued marketing to springboard their market share once the crisis abates, as [encouraged by academics and marketing gurus](#).

At [Opinium](#), we're already seeing this play out in the industries we're tracking, with the Hospitality, Fitness, Household goods and Retail sectors all seeing their prominence with the public dip. Furthermore, in sectors where heightened awareness due to the crisis isn't declining at an overall level, we're starting to see levels of exposure returning to normal.

## Those industries impacted the most by the lockdown are far less vocal than at the beginning of the crisis

How vocal are brands?



Thinking about the last week, do you feel like you've been hearing more or less than usual about the following types of companies?  
c.2,000 UK adults

The danger for many organisations is that, as the lockdown lengthens, and with [9-in-10 marketers](#) now delaying campaigns, people are beginning to lose their connection with their old faithful's and trusted go-to brands.

## Leading from the front

### Get shouty

Supermarkets (more on this later) have extended their reputation as dealing effectively and efficiently to the crisis. As panic buying relents, toilet roll becomes available, and practical steps are introduced across the board to ration the number of people in store, the sector is combining action with publication to raise their profile with over 90% of those surveyed having heard from them in the last week.

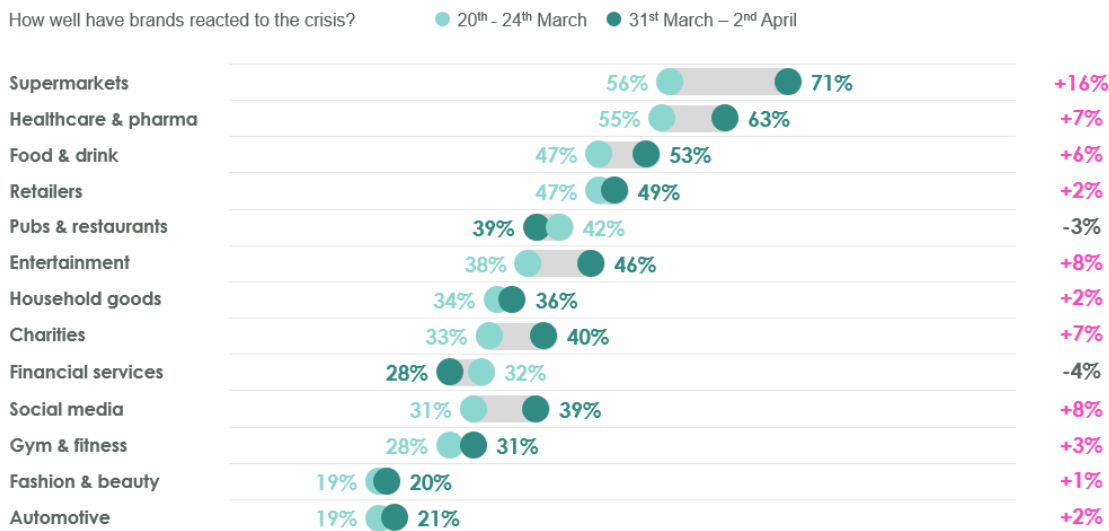
A similar story is reflected amongst charities, with now 79% of the population stating that they have heard more from the sector in the last week, corresponding with a 7% rise in consumers' belief that charities are reacting well to the crisis.

Conversely, the perceived reduction in communications from Household Goods, Pubs and Restaurants, and Gyms and Fitness has seen belief in these sectors ability to respond stagnate.

**Thwart the boredom**

Staying home to save lives has created significant opportunities for both the Entertainment sector and Social Media. As boredom with the current situation grows, so too does the need for escapism, connection and routine. Once ordinary activities such as watching your favourite Netflix series or talking to your family are suddenly elevated to become key focal points around which to structure our daily routines

## Many sectors have markedly improved their perceived response, with a few notable exceptions



How well do you think the following types of companies have responded to the crisis?  
 c.2,000 UK adults

### It's not just what you say, it's how you say it

So how do you keep the public engaged with your brand at a time of crisis?

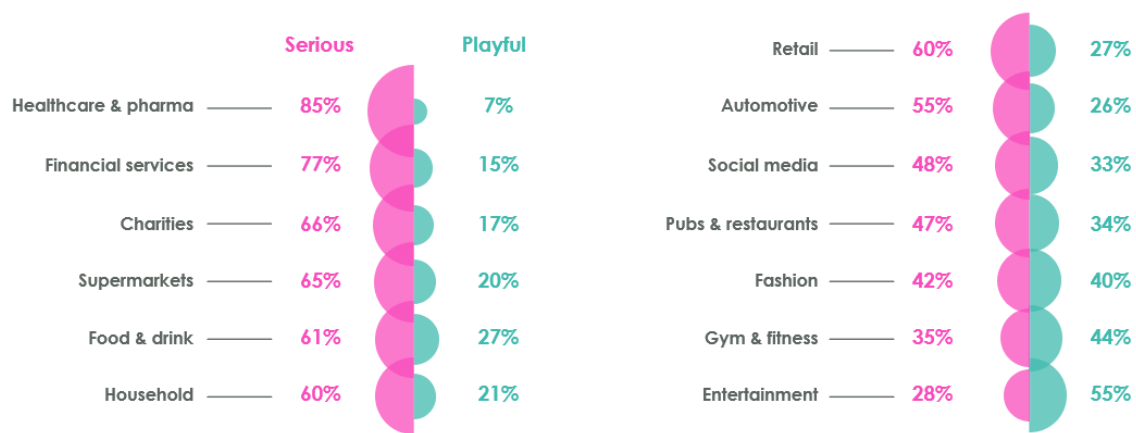
Well, firstly it's not just about the content, but the tone you adopt.

At an overall level, consumers are seeking communications from brands that are informative (69%), serious (56%), educational (54%), but also inspiring (49%). The extent to which these differ by sector, however, is extensive.

As anticipated, sectors offering essential services such as pharmaceuticals skew heavily towards scientific, detailed and authoritative messaging as consumers seek reassurance in statistics and information. Traditionally conservative industries such as Financial Services and Automotive over-index on the need to adopt a professional and informative tone.

## Those industries in the eye of the storm need to strike a serious tone, whilst others can be more playful

What tone of voice do consumers want to hear from different sectors?



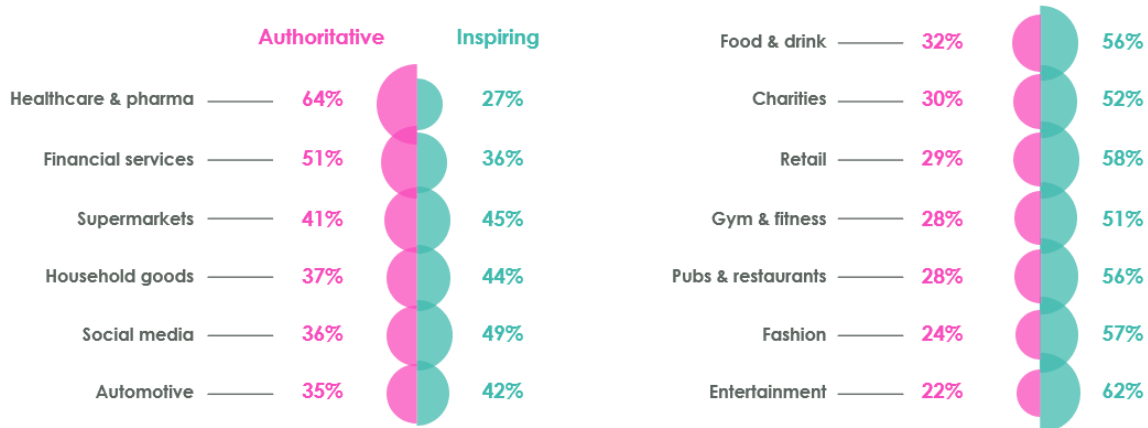
When thinking about the content of communications from companies in the [X] sector, would you like it to be...  
 2,005 UK adults

So far, so expected. No-one, after all, wants your mortgage provider to be suddenly sending you emails full of Care Bears and heart emojis.

Yet as 41% of the population are actively avoiding the news, entertainment brands can come into their own. Demand for communications which adopt friendly, warm and personal tones reflects much of the sector's pre-corona marketing strategy. And, as boredom of the lockdown amongst the public grows, demand for inspiring content soars in sectors where consumers can still choose whether to engage with brands, rather than needing to depend upon them.

## Not all comms need to be top down, inspiration is a fertile ground for many sectors

What tone of voice do consumers want to hear from different sectors?



When thinking about the content of communications from companies in the [X] sector, would you like it to be...  
 2,005 UK adults

Light-hearted communications remain difficult to successfully pull off at the best of times. But for brands operating in the Entertainment, Gyms and Fitness, and Fashion industries there is an opportunity to test the water with over 40% of UK adults stating that they would prefer organisations within these sectors to adopt playful, rather than serious communications.

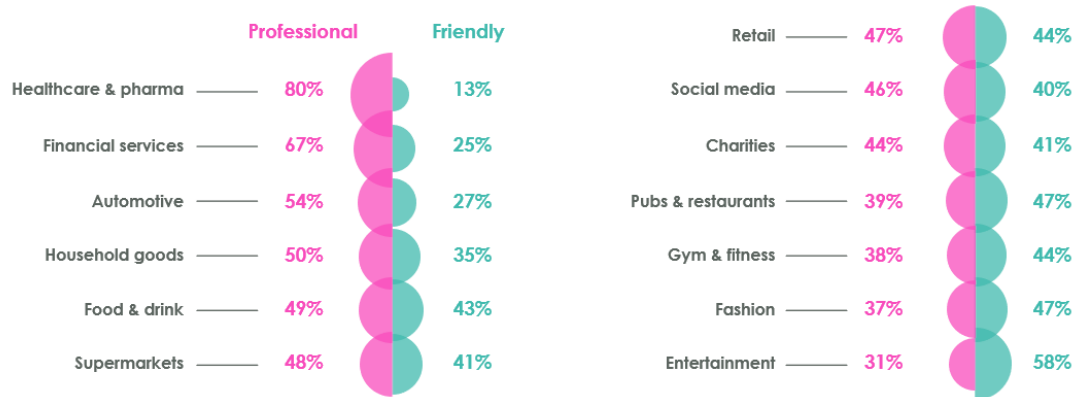
### The balancing act

The trade-off between communication styles remains deeply divided with sectors conventionally associated with more friendly, approachable messaging suddenly required to adopt a more professional tone. For Supermarkets in particular, the transition from a business whose content is often based around notions of family, inspiration and togetherness, to a provider of essential (and sometimes rationed) goods has split consumers. Pre-corona associations of how brands and organisations have traditionally engaged with their audiences have been challenged, but not forgotten.



## Many sectors still have scope to play on their pre-Corona 'friendly' personality

What tone of voice do consumers want to hear from different sectors?



When thinking about the content of communications from companies in the [X] sector, would you like it to be...  
 2,005 UK adults

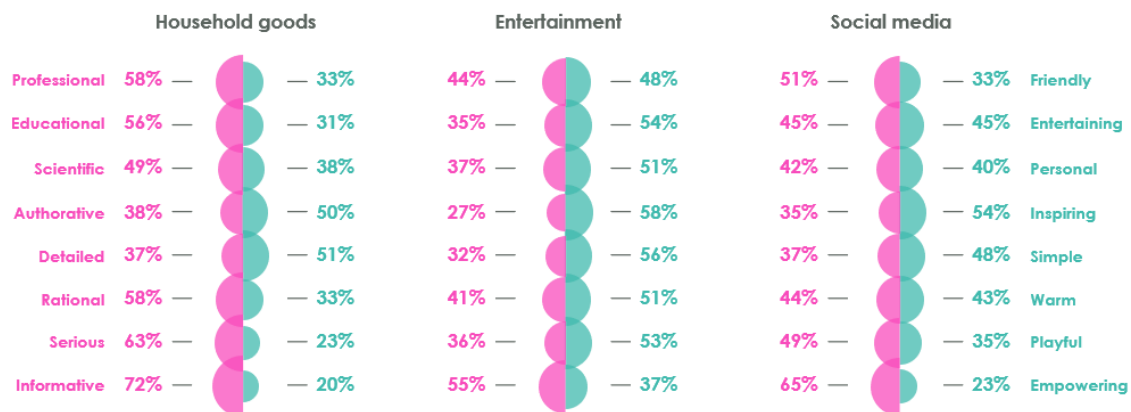
### Mind the 'parental gap'

Whilst differences in age continue to reflect pre-pandemic marketing preferences with younger generations tending to endorse more light-hearted, playful communications, there is one notable exception: parents.

The closure of schools. The need to entertain and educate their children at home. The reduced streaming speeds of Netflix. Whatever the rationale, parents with children under 18 repeatedly prefer more serious, rational styles of communication in comparison to non-parents for what some may describe as non-essential categories.

## Parents are looking for communication to be simple, rational, serious and informative

What tone of voice do parents with children under 18 want to hear from different sectors?



When thinking about the content of communications from companies in the [X] sector, would you like it to be...  
 c.150 parents with children aged under 18

## So how is this translating to actual brands?

Getting your content, tone and media strategy right is of course easier said than done, but there are lessons we can learn from the sectors which are seen to have improved their response over the last week.

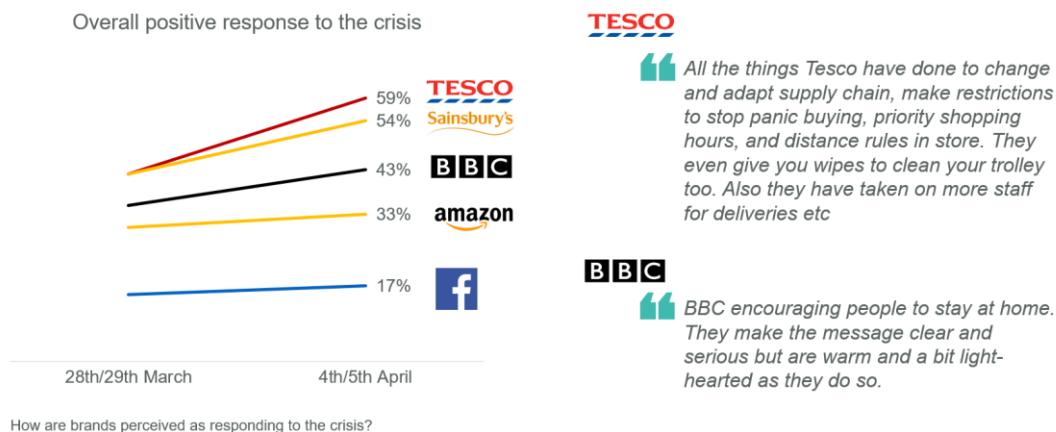
The brands viewed as reacting most positively to the crisis are the leading supermarket brands and the BBC. This is due to their ability to excel in delivering on their core purpose when needed most, for the supermarkets this is keeping the nation fed and for the BBC keeping the nation informed.

However, the reasons people believe they have risen to the challenge are because they have gone **above and beyond their core purpose**.

In the face of social media alarmist and often inaccurate information, the BBC has offered calm, reassuring and above all factual reporting of the coronavirus. The organisation has gone beyond purely reporting the news, to becoming a conduit for advice and guidance, helping to keep the nation safe.

The Beeb is also tapping into something more, however – it is offering the country hope and a rare glimmer of optimism. From reading poems on Radio 4's the Today programme, to launching its' Make a Difference campaign to tell inspiring local stories and providing more educational content to help home-schooling parents, the organisation is once again transformed into more than just a broadcaster.

## The new 'essential services' are viewed as responding most positively to the crisis

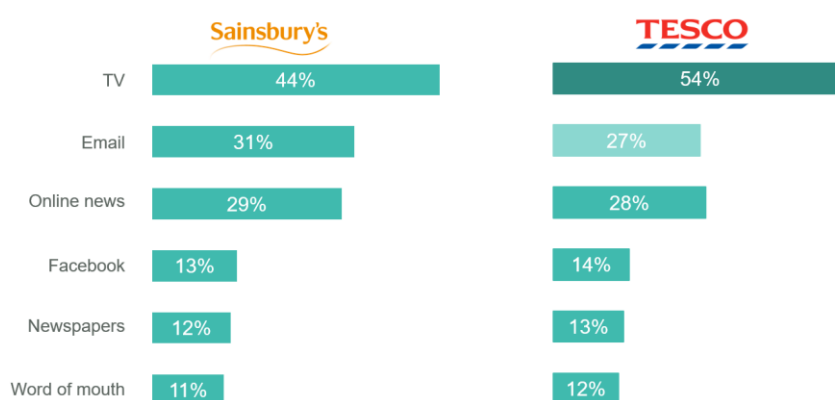




## Time to pivot? What we can learn from the ‘super’-markets

The efforts undertaken by supermarkets to transition from everyday operator to essential public service provider has been widely recognised by the public. This is due, at least in part, to the supermarkets’ multi-channel marketing strategies, designed to keep consumers informed about their actions, their response, but also their brand across multiple touchpoints

### Doing what they say, and making sure they tell us about it



But success for the supermarkets, and indeed for others, has not been determined by a barrage of communication and messaging rammed down consumers throats. When asked to explain which brands have shared memorable content with them, the public were clearly able to say why supermarkets communications strategies have been so effective.

Tesco was noted for enlisting every touchpoint in their armoury to offer clear, relevant and constant information to the public. Namely:

1. Using email correspondence to offer personalised information
2. Communications directly from the CEO to inform on changes to their policy and the gravity with which they are viewing the crisis
3. Social activity such as presenting flowers to NHS staff to evoke an emotional response
4. In-store activity to educate shoppers on social distancing measures
5. TV activity, putting staff members front and centre to explain the new social distances measures

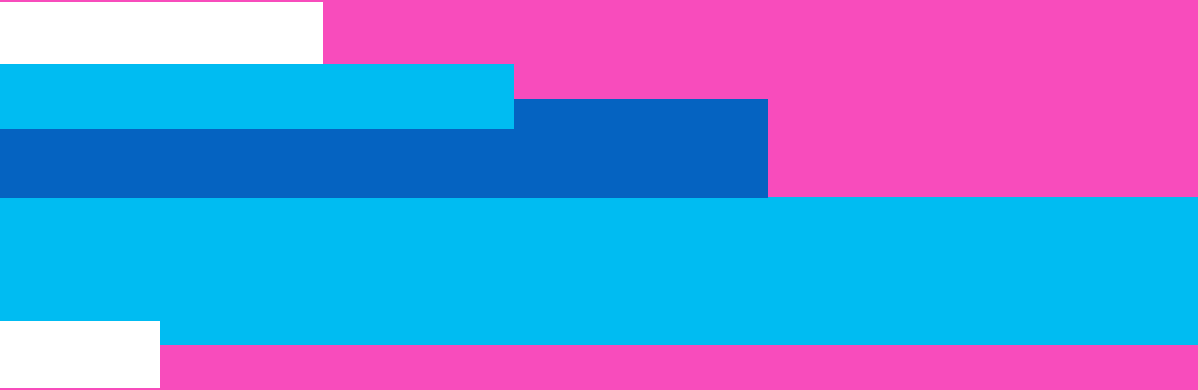
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## One final thought

We know that there's a lot of information out there about what brands should and shouldn't be doing and saying. And if we're honest, it can seem pretty overwhelming. So, if you're able to only take one thing away from this report we want it to be this:

Now isn't the time for brands to self-isolate in their boardrooms, now more than ever is the time to reach out to the public by every channel available. People are hungry for information, reassurance, for hope and for distraction. If your brand can fulfil any one of these desires now is the time to try – and the public will thank you for it.

If you'd like to know more about what people expect of your brand or how consumer's attitudes and behaviours are changing, get in touch: [research@opinium.com](mailto:research@opinium.com)



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