Opinium
Brands and marketing post-pandemic

A series of thought leadership reports looking at how the pandemic has irreparably changed our attitudes and expectations from brands and marketers.
Contents and sample

1. Change
2. Division
3. Communication
Change
Society is split on whether they want a return to life as it was, or to build on the changes the pandemic has forced on us.

What kind of life do people want in 2021?

41%
I want **things to go back** to exactly the way they were before the pandemic

45%
I want **everything to change** from how it was before the pandemic

15% 11% 15% 14% 22% 16% 8%
Despite some saying they will drop pandemic habits, many new habits will stick

Which pandemic habits have people tried or picked up, and which will stick?

<table>
<thead>
<tr>
<th>Tried / picked-up over the last year</th>
<th>Carry on doing in 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walks around local area</td>
<td>43%</td>
</tr>
<tr>
<td>No longer paying with cash</td>
<td>36%</td>
</tr>
<tr>
<td>Buy online instead of going in-store to see it / try it on</td>
<td>38%</td>
</tr>
<tr>
<td>Regularly calling my close family</td>
<td>27%</td>
</tr>
<tr>
<td>Grocery shopping online, rather than in-store</td>
<td>32%</td>
</tr>
<tr>
<td>Cooking lunch rather than buying it</td>
<td>29%</td>
</tr>
<tr>
<td>Having a smaller wardrobe / wearing fewer different outfits</td>
<td>24%</td>
</tr>
<tr>
<td>Making a conscious effort to support small businesses</td>
<td>21%</td>
</tr>
<tr>
<td>No longer commuting into work 5 days a week</td>
<td>21%</td>
</tr>
<tr>
<td>A form of regular exercise</td>
<td>21%</td>
</tr>
<tr>
<td>Dressing my way, not how others might want me to look</td>
<td>19%</td>
</tr>
<tr>
<td>Trying to fix things myself rather than paying</td>
<td>17%</td>
</tr>
</tbody>
</table>

Question text in notes.
2,000 UK adults
Which pandemic habits have people tried or picked up, and which will stick?

- Working out at home rather than going to the gym: 15%
- Arts and crafts e.g. painting, knitting, pottery / ceramics: 13%
- Having big nights in, rather than big nights out: 15%
- Holidaying local rather than going abroad: 16%
- Practised mediation / mindfulness: 10%
- Checking my phone less: 8%
- Becoming more involved in my local community: 5%
- Getting a delivery box of fresh groceries: 4%
- Getting home delivery kit from a restaurant: 2%
- Getting a meal kit: 6%
- Investing in high-end skincare: 6%
- Starting up a side business alongside my normal job: 4%
- Become vegetarian or vegan: 3%

However, more niche and faddy changes are less likely to stick.
A successful vaccination programme and gradually easing of restrictions shows an improved optimism

How optimistic do people feel about the rest of 2021?

**Feb**
- 43% I’m feeling **pessimistic** about the rest of 2021
- 9% I’m feeling **optimistic** about the rest of 2021

**May**
- 30% I’m feeling **pessimistic** about the rest of 2021
- 6% I’m feeling **optimistic** about the rest of 2021

Looking at these two statements, which do you agree with more?

2,000 UK adults
The largest of these shifts relate to broader societal issues, such as education and the economy.

How optimistic do people feel about the rest of 2021?

### Personal

- **The impact of technology on my life**
  - Feb: 33% Pessimistic, 67% Optimistic
  - May: 30% Pessimistic, 70% Optimistic

- **My health**
  - Feb: 34% Pessimistic, 66% Optimistic
  - May: 29% Pessimistic, 71% Optimistic

- **My income and living standards**
  - Feb: 35% Pessimistic, 65% Optimistic
  - May: 30% Pessimistic, 70% Optimistic

- **My career / job prospects**
  - Feb: 39% Pessimistic, 61% Optimistic
  - May: 29% Pessimistic, 71% Optimistic

### Societal

- **The NHS**
  - Feb: 36% Pessimistic, 64% Optimistic
  - May: 32% Pessimistic, 68% Optimistic

- **The environment**
  - Feb: 47% Pessimistic, 53% Optimistic
  - May: 32% Pessimistic, 68% Optimistic

- **Our education system**
  - Feb: 59% Pessimistic, 41% Optimistic
  - May: 41% Pessimistic, 59% Optimistic

- **The economy**
  - Feb: 62% Pessimistic, 38% Optimistic
  - May: 49% Pessimistic, 51% Optimistic

- **Life prospects for young people**
  - Feb: 62% Pessimistic, 38% Optimistic
  - May: 51% Pessimistic, 49% Optimistic
Society is split in terms of aspirations and expectations

Lockdown habits are sticky

Optimism is increasing across all areas of life

Brands need to know how to communicate to these different groups

Don’t expect things to go back to exactly the way they were

Consumer confidence is rebounding quickly
Division
We have segmented the UK based on their attitudes towards the future.

**I want things to go back to exactly the way they were before the pandemic**
- **Better in the past**
- **The devil you know**

**I want everything to change from how it was before the pandemic**
- **Go-getters**
- **Necessary changers**

**I’m feeling optimistic about the rest of 2021**
- **Undecideds**

**I’m feeling pessimistic about the rest of 2021**
We have segmented the UK based on their attitudes towards the future

Go-getters
Optimistic, don’t want things to go back to the way they were

Necessary changers
Pessimistic, don’t want things to go back to the way they were

Better in the past
Optimistic, want things to go back to the way they were

The devil you know
Pessimistic, want things to go back to the way they were

Undecideds
Unsure across any metric
Some are approaching 2021 with a sense of opportunity, whilst others are more reserved and tentative

<table>
<thead>
<tr>
<th>Adventure</th>
<th>Reservedness</th>
</tr>
</thead>
<tbody>
<tr>
<td>65% We have the opportunity to reinvent ourselves and our society</td>
<td>78% I don’t think we’ve seen the last of the pandemic</td>
</tr>
<tr>
<td>64% All bets are off – anything could happen</td>
<td>59% My personal space will be more important than ever</td>
</tr>
<tr>
<td>44% There’s less pressure now to be what other people want you to be</td>
<td>51% I’m now so used to how things are, changes will take some getting used to</td>
</tr>
<tr>
<td>30% I just want to get back out there, regardless of the risks to myself and others</td>
<td>40% I’m going to be sticking to old traditions, rather than making new ones</td>
</tr>
<tr>
<td>30% Brexit divisions in society will be a thing of the past</td>
<td>33% I’m likely to need to rely on others to support my wellbeing</td>
</tr>
</tbody>
</table>

To what extent do you agree or disagree with the following? In 2021 …

- [ ] Better in the past
- [ ] The devil you know
- [ ] Go-getters
- [ ] Necessary changers

* sig higher than total at 95%
Values, conscious or unconscious, motivate every decision made or action taken. By focusing on values, rather than simply attitudes, we can understand how to communicate ideas that resonate with deeply held beliefs and aspirations.

**Our values framework**

<table>
<thead>
<tr>
<th>Values</th>
<th>Behaviours</th>
<th>Attitudes</th>
<th>Values</th>
</tr>
</thead>
</table>

*Hierarchy of importance*

- **Security**: 16%
- **Autonomy**: 14%
- **Material Rewards**: 14%
- **Creativity**: 14%
- **Meaning**: 12%
- **Affiliation**: 12%
- **Status**: 9%
- **Power and Influence**: 8%
Security is more important to those who hanker for the pre-pandemic world

What’s most important to our groups?

Better in the past

- Material Rewards
- Power and Influence
- Status
- Security
- Meaning
- Creativity
- Affiliation
- Autonomy

The devil you know

- Material Rewards
- Power and Influence
- Status
- Security
- Meaning
- Creativity
- Affiliation
- Autonomy

Which of these statements do you agree with most?

2,000 UK adults

= sig higher than total at 95%
Those who desire societal change are looking for greater meaning in their lives

What’s most important to our groups?

Go-getters

Necessary changers

Material Rewards

Status

Power and Influence

Security

Meaning

Creativity

Autonomy

Affiliation

Material Rewards

Status

Power and Influence

Security

Meaning

Creativity

Autonomy

Affiliation

Which of these statements do you agree with most? 2,000 UK adults

* sig higher than total at 95%
Life-stage provides some context, but fails to completely account for difference in views

<table>
<thead>
<tr>
<th>Demographic profiles</th>
<th>Single (no children)</th>
<th>Relationship (no children)</th>
<th>Parent (child under 11 lives at home)</th>
<th>Parent (child 11-17 lives at home)</th>
<th>Parent (adult child lives at home)</th>
<th>Working parent, children have left home</th>
<th>Retired couple</th>
<th>Retired adult living alone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Better in the past</td>
<td>20%</td>
<td>27%</td>
<td>21%</td>
<td>24%</td>
<td>24%</td>
<td>27%</td>
<td>39%</td>
<td>34%</td>
</tr>
<tr>
<td>The devil you know</td>
<td>8%</td>
<td>11%</td>
<td>8%</td>
<td>9%</td>
<td>12%</td>
<td>14%</td>
<td>12%</td>
<td>14%</td>
</tr>
<tr>
<td>Go-getters</td>
<td>22%</td>
<td>21%</td>
<td>25%</td>
<td>24%</td>
<td>27%</td>
<td>21%</td>
<td>23%</td>
<td>22%</td>
</tr>
<tr>
<td>Necessary changers</td>
<td>18%</td>
<td>18%</td>
<td>27%</td>
<td>22%</td>
<td>16%</td>
<td>15%</td>
<td>10%</td>
<td>14%</td>
</tr>
<tr>
<td>Undecideds</td>
<td>32%</td>
<td>24%</td>
<td>19%</td>
<td>20%</td>
<td>21%</td>
<td>22%</td>
<td>16%</td>
<td>16%</td>
</tr>
</tbody>
</table>

* sig higher than total at 95%
It is the lived experiences of the pandemic that better indicate the sort of future people want.

What impact has the last year had on …?

<table>
<thead>
<tr>
<th>Area</th>
<th>Better in the past</th>
<th>The devil you know</th>
<th>Go-getters</th>
<th>Necessary changers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your free time</td>
<td>7%</td>
<td>5%</td>
<td>33%</td>
<td>23%</td>
</tr>
<tr>
<td>Your relationship with your family</td>
<td>19%</td>
<td>5%</td>
<td>30%</td>
<td>24%</td>
</tr>
<tr>
<td>Your work life</td>
<td>1%</td>
<td>-12%</td>
<td>22%</td>
<td>18%</td>
</tr>
<tr>
<td>Your finances</td>
<td>19%</td>
<td>-1%</td>
<td>25%</td>
<td>12%</td>
</tr>
<tr>
<td>Your physical health / fitness</td>
<td>-9%</td>
<td>-40%</td>
<td>5%</td>
<td>-5%</td>
</tr>
<tr>
<td>Your relationship with your friends</td>
<td>-7%</td>
<td>-27%</td>
<td>9%</td>
<td>4%</td>
</tr>
<tr>
<td>Your love life</td>
<td>7%</td>
<td>-7%</td>
<td>12%</td>
<td>9%</td>
</tr>
<tr>
<td>Your mental health</td>
<td>-13%</td>
<td>-49%</td>
<td>-6%</td>
<td>-12%</td>
</tr>
<tr>
<td>Your social life</td>
<td>-46%</td>
<td>-58%</td>
<td>-35%</td>
<td>-17%</td>
</tr>
</tbody>
</table>

Thinking about the following areas, would you say that last year has been positive or negative for…?

4,000 UK adults
<table>
<thead>
<tr>
<th>What does it tell us?</th>
<th>Why does it matter?</th>
</tr>
</thead>
<tbody>
<tr>
<td>The roaring 20s is not desired by everyone, conservatism is still common</td>
<td>Pick a side: brands need to decide which post-COVID narrative to support</td>
</tr>
<tr>
<td>There is no consistent demographic profile of each group</td>
<td>Profiling beyond life-stage is needed to capture the full impact of COVID</td>
</tr>
<tr>
<td>People’s approach to the future is driven by a difference in values</td>
<td>Understand and speak to consumer values to resonate with their aspirations</td>
</tr>
<tr>
<td>People’s experiences of the pandemic differ wildly by segment</td>
<td>Future needs are driven by lived experiences of the pandemic</td>
</tr>
</tbody>
</table>
Cross-sector overview: People want advertising to move on from the pandemic, focusing on pricing and products

What sort of communications would you like to see from brands?

- Discounts and offers
- Products and services
- Looking forward to the future
- Embracing a positive spirit
- Something not to do with the current pandemic
- Updates on the brand and its business
- Showcasing support for local communities
- Partnerships with charities
- Remembering those impacted by COVID
- Celebrating getting through lockdown
- Reconnecting with friends and family
- Showcasing traditional values
- Overcoming adversity
- Real-life stories
- Messages from employees
- Looking back at the past

Better in the past
The devil you know
Go-getters
Necessary changers

* sig higher than total at 95%
Cross-sector overview: Looking for a balance between inspiration and information

What tone of voice would you like to hear in advertising?

<table>
<thead>
<tr>
<th>Tone of Voice</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inspiring</td>
<td>54%</td>
</tr>
<tr>
<td>Personal</td>
<td>50%</td>
</tr>
<tr>
<td>Simple</td>
<td>49%</td>
</tr>
<tr>
<td>Warm</td>
<td>48%</td>
</tr>
<tr>
<td>Friendly</td>
<td>43%</td>
</tr>
<tr>
<td>Entertaining</td>
<td>38%</td>
</tr>
<tr>
<td>Playful</td>
<td>38%</td>
</tr>
<tr>
<td>Empowering</td>
<td>23%</td>
</tr>
</tbody>
</table>

Authoritative: 35%
Scientific: 40%
Detailed: 42%
Rational: 42%
Professional: 47%
Educational: 51%
Serious: 51%
Informative: 69%

Better in the past and The devil you know are more likely to over-index on wanting to hear comms using these tones of voice.
Desire for brands to advertise has ticked up – suggesting people are keen to hear from brand and marketers

What are your preferred channels for brands to advertise and communicate to you?

Emails 40% 39% 39% 38% 39% 39% 37% 44% 40%
TV advertising 31%
Social media posts 18% 16% 15% 13% 15% 16% 19% 20%
Online advertising 12% 12% 15% 16% 15% 16% 17% 12%
Social media advertising 11% 10% 10% 12% 8% 8% 9% 5%
Text messages 5% 5% 6% 4% 5% 5% 5% 5%
Phone calls 5% 5% 6% 4% 5% 5% 5% 5%

What are your preferred channels for brands to advertise and communicate to you?
2,000 UK adults

20th - 24th March 31st March - 2nd April 17th - 20th April 12th - 14th May 10th - 13th July 18th - 21st Sept 11th - 16th Feb 26th May - 3rd June
Segments display unique channel usage profiles, although Social and TV are always the big two for daily interaction.

How often do you watch, listen to, read or interact with the following?

- Social media (e.g. Facebook, Instagram): Daily 54%
- Terrestrial TV (e.g. BBC, ITV): Daily 53%
- Pay TV services (e.g. Sky TV, Virgin Media TV): Daily 35%
- Traditional radio (e.g. BBC Radio, Capital): Daily 33%
- Subscription streaming services (e.g. Netflix, Amazon Prime): Daily 28%
- Online video/catch-up (e.g. BBC iPlayer, YouTube): Daily 24%
- Subscription music/radio (e.g. Spotify, Apple Music, Tidal): Daily 18%

Better in the past: The devil you know: Go-getters: Necessary changers:

* sig higher than total at 95%
However, streaming and catch-up services have the most positive emotional associations

<table>
<thead>
<tr>
<th></th>
<th>Social media</th>
<th>Terrestrial TV</th>
<th>Pay TV services</th>
<th>Traditional radio</th>
<th>Subscription streaming services</th>
<th>Online video/catch-up</th>
<th>Subscription music/radio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Escapism</td>
<td>-8</td>
<td>-1</td>
<td>1</td>
<td>-3</td>
<td>11</td>
<td>6</td>
<td>-1</td>
</tr>
<tr>
<td>Happiness</td>
<td>-8</td>
<td>0</td>
<td>-2</td>
<td>1</td>
<td>4</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>Excitement</td>
<td>-6</td>
<td>-2</td>
<td>3</td>
<td>-4</td>
<td>10</td>
<td>4</td>
<td>0</td>
</tr>
<tr>
<td>Interest</td>
<td>-4</td>
<td>5</td>
<td>-1</td>
<td>2</td>
<td>0</td>
<td>6</td>
<td>-4</td>
</tr>
<tr>
<td>Comfort</td>
<td>-8</td>
<td>6</td>
<td>-2</td>
<td>3</td>
<td>1</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>Boredom</td>
<td>-9</td>
<td>0</td>
<td>-1</td>
<td>1</td>
<td>-4</td>
<td>-3</td>
<td>-1</td>
</tr>
<tr>
<td>Frustration</td>
<td>8</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>-6</td>
<td>-4</td>
<td>0</td>
</tr>
<tr>
<td>Anxiety</td>
<td>11</td>
<td>-3</td>
<td>0</td>
<td>0</td>
<td>-3</td>
<td>-3</td>
<td>1</td>
</tr>
</tbody>
</table>

Which of the following types of media do you associate with the following? 2,000 UK adults
And helped the nation get through the lockdowns

How often do you watch, listen to, read or interact with the following?

<table>
<thead>
<tr>
<th></th>
<th>Social media</th>
<th>Terrestrial TV</th>
<th>Pay TV services</th>
<th>Traditional radio</th>
<th>Subscription streaming services</th>
<th>Online video/catch-up</th>
<th>Subscription music/radio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Couldn’t live without</td>
<td>-8</td>
<td>1</td>
<td>-1</td>
<td>2</td>
<td>3</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>I always make time in my day to engage with</td>
<td>4</td>
<td>2</td>
<td>-1</td>
<td>2</td>
<td>-2</td>
<td>-1</td>
<td>-2</td>
</tr>
<tr>
<td>Has helped me get through the lockdowns</td>
<td>-8</td>
<td>-3</td>
<td>-2</td>
<td>-3</td>
<td>11</td>
<td>7</td>
<td>0</td>
</tr>
<tr>
<td>Brings a lot of positivity into my life</td>
<td>-9</td>
<td>-4</td>
<td>0</td>
<td>1</td>
<td>4</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>Is something social to do with others</td>
<td>14</td>
<td>-6</td>
<td>0</td>
<td>-4</td>
<td>4</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Has things that are personalised to me</td>
<td>5</td>
<td>-11</td>
<td>-2</td>
<td>-5</td>
<td>8</td>
<td>4</td>
<td>7</td>
</tr>
<tr>
<td>Is where it’s okay for brands to advertise to me</td>
<td>-2</td>
<td>7</td>
<td>2</td>
<td>1</td>
<td>-5</td>
<td>2</td>
<td>-2</td>
</tr>
<tr>
<td>The content is always the same</td>
<td>-3</td>
<td>11</td>
<td>2</td>
<td>4</td>
<td>-3</td>
<td>-3</td>
<td>-2</td>
</tr>
<tr>
<td>Is becoming less important to me</td>
<td>3</td>
<td>5</td>
<td>1</td>
<td>3</td>
<td>-5</td>
<td>-4</td>
<td>0</td>
</tr>
<tr>
<td>Getting a bit bored with</td>
<td>7</td>
<td>6</td>
<td>1</td>
<td>2</td>
<td>-5</td>
<td>-4</td>
<td>-1</td>
</tr>
</tbody>
</table>
When looking at communication preferences, many are looking for a personal connection and humour.

How do you prefer to communicate with people in your personal life?

- Connect with someone on a personal level: 45%
- Use humour to make a point: 45%
- Describe something in words: 43%
- Refer to concrete facts to support your point of view: 33%
- Communicative visually – e.g. using images, diagrams, emojis: 20%
- Use numbers to support your point of view: 18%

Thinking about when you’re communicating with people in your personal life, do you prefer to communicate using the following? Please select all that apply. Please think only about how you prefer to communicate, even if this option is not always available.

2,000 UK adults

* sig higher than total at 95%
<table>
<thead>
<tr>
<th>What does it tell us?</th>
<th>Why does it matter?</th>
</tr>
</thead>
<tbody>
<tr>
<td>People want to hear about products, services and discounts again</td>
<td>Appetite has moved on from COVID ads, brands need to look forward</td>
</tr>
<tr>
<td>Some want emotional comms, whilst others want something rational</td>
<td>Brands need to balance positive inspiration with factual information</td>
</tr>
<tr>
<td>COVID has elevated the importance of humour and personal connection</td>
<td>Brands and marketers have permission to employ humour and human contact</td>
</tr>
<tr>
<td>Channels have distinct emotional and functional benefits</td>
<td>Ensure that the channel benefits match the benefits of your brand or product</td>
</tr>
</tbody>
</table>
Thank you