

Understanding Uncertainty: The Impact of COVID-19

2020

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The State of Uncertainty

Before the COVID-19 pandemic began, uncertainty was already prevalent in the everyday lives of people in the UK.

Prior to March 2020, 65% of people reported that they felt 'uncertain' about current societal shifts¹; with macro drivers, such as political unrest around Brexit, to micro uncertainties such as not getting paid on time, continuing to play their part.

The speed at which COVID-19 affected the UK served to dramatically enhance this notion of uncertainty. Macro drivers such as the future of the economy and the ability of the NHS to cope are being felt across the nation. Combined with micro drivers on an unprecedented scale, from concerns about job security, how to navigate the potential for government assistance for the self-employed, to the safety of loved ones.

The big question of when it will all end is one that continues to underpin the notion of uncertainty across the world.

In the UK, we're taking a pessimistic view of the length of the pandemic, with only 33% of people believing it will last for a three-month window, compared with 40% of people in Ireland. This compares to figures from across the world; as of mid-March, 70% of Spaniards believed it would be over in three months, while 33% of Dutch and only 20% of those in Singapore felt that this was a realistic timeframe².

The lack of initial data and the inability of governments to provide an accurate timeframe has only served to feed the global uncertainty.

At the same time, constant access to media sources makes worldwide news feel more immediate than ever before. Today instant news notifications on smartphones mean people are more aware than ever of events around the globe. People have constant access to news from those countries that are ahead of the UK in terms of the increased spread of the disease. Put simply, people have an instant window into what is potentially to come. This notion of unpredictability and lack of control feeds uncertainty.

Since the start of March, we've seen a 33% increase in average daily smartphone impressions, coupled with a 43% increase in traffic to news sites month on month³.

During these times of uncertainty, people are looking for brands to play a key role in their lives. They don't expect them to be disengaged. With insecurity and panic rife in the market, consumers are looking to a multitude of sources to offer them comfort and understanding.

Businesses have an opportunity to extend their brand beyond being a "goods and services" provider and play a part in helping people through tough and uncertain times. By providing long-term value whilst people are uncertain of their own lives and the future of the country, proactive brands will be remembered and valued in these times of adversity.

In our 2019 Understanding Uncertainty report⁴, in partnership with Canvas8, we identified four key emerging behaviours as a result of uncertainty.

- **Emotional buyers**

People rely on emotions to make decisions when they feel uncertain.

- **Familiar choices**

People avoid risk by choosing brands and products that offer a sense of familiarity.

- **Control seekers**

People seek to regulate their sense of control through the products they buy.

- **Decision avoiders**

People don't want to make decisions when they feel uncertain.

In this report we revisit these behaviours and explore how they are impacted by COVID-19 and how brands can adapt to meet the changing needs of consumers.



Emotional buyers

People rely on emotions to make decisions when they feel uncertain.

Experiencing uncertainty can make people feel stressed. Studies of functional magnetic resonance imaging (fMRI) reveal that the brain is more active when people feel uncertain, particularly among brain regions that play a key role in anxiety and stress such as the insula and amygdala⁵.

In fact, research suggests that uncertain events are more stressful than knowing that something bad is definitely going to happen. A 2016 study in the journal Nature Communications found that participants who knew they would get an electric shock were calmer and less agitated than those that were told that they had a 50% chance of getting an electric shock⁶.

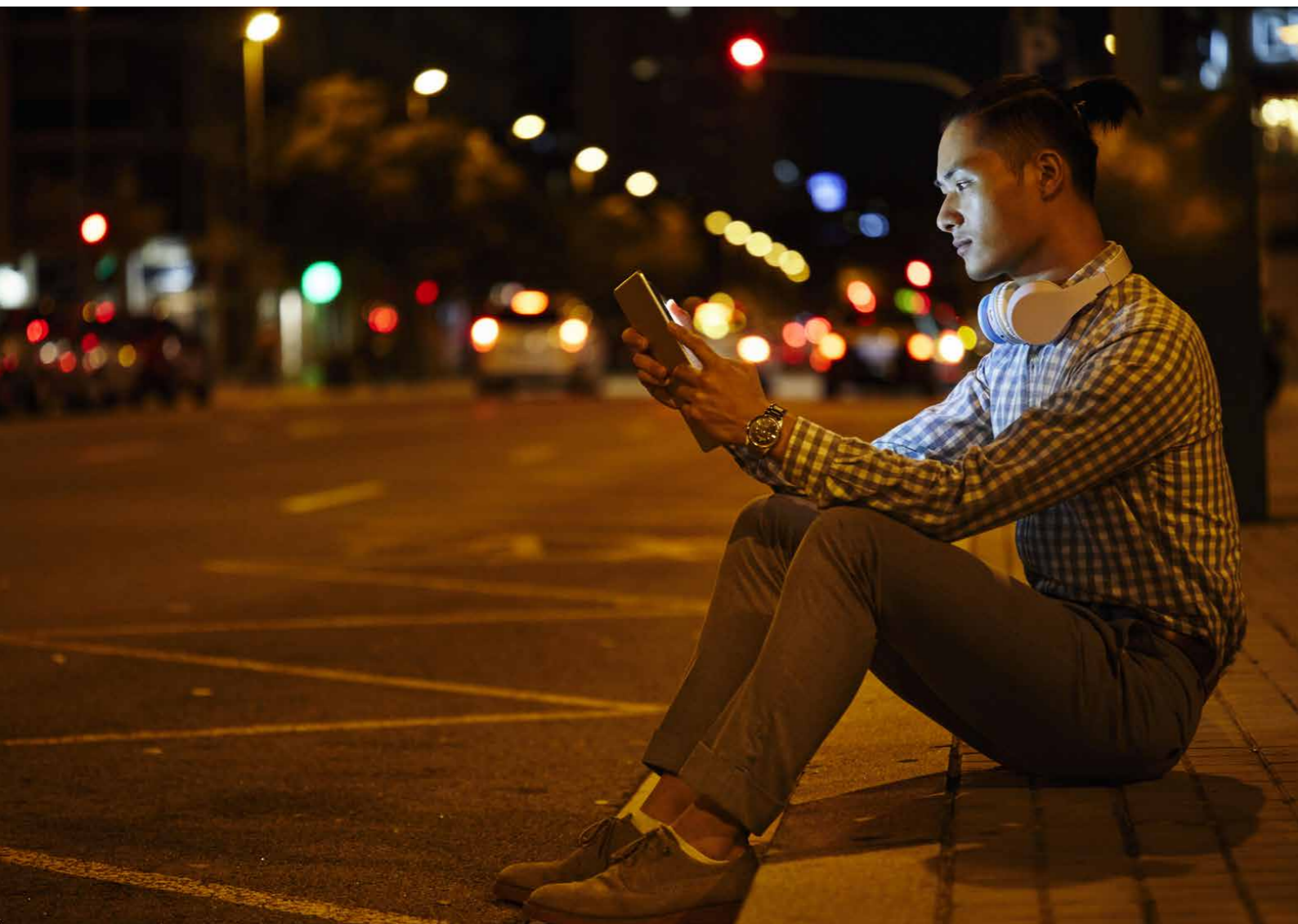
This is particularly relevant in times of pandemic when people have little idea of what will definitely happen in the UK and how it could impact their lives. They know that it will, just not the extent.

Even before the pandemic, widespread uncertainty was already contributing to rising levels of stress in the UK. Specifically, in 2019 67% of Britons were more stressed compared to 2013⁷.

While previously, considerable sources of stress placed on many people centred around global warming, the environment and Brexit, the uncertainty of the COVID-19 outbreak has further exacerbated this.

Emotional buying – also called affect regulation – describes the product choices people make to impact their mood. Unwanted uncertainty can drive people to look for immediately rewarding things to push back the negative emotions.

Uncertainty doesn't just affect how people make purchase decisions; it also affects what they're looking to buy in the first place. Research, conducted by Professor Michel Tuan Pham and Assistant Professor Charlene Y. Chen, has identified the most likely responses to negative emotions like stress, anger or anxiety is the consumption of tension-regulating substances – such as alcohol, engaging in physical exercise, or seeking out calming stimuli such as relaxing TV shows or soothing music⁸.



“When consumers are in a situation of uncertainty, when their environment has changed, what they see others doing is a very useful guide as to how they should behave. Brands that stress their popularity, their scale, their wide ranging appeal should see even greater benefits in going that than they normally would.”

Richard Shotton

The consumer Covid-19 response

Stress and anxiety were particularly high during the beginning of the COVID-19 outbreak due to the uncertainty that it would have on daily lives, incomes, and health. Huge spikes in mentions of ‘anxious’ or ‘stressed’ were seen across Twitter in the UK in early March, while mentions including these keywords were up 127% in March vs. the same period the previous year⁹.

Large volumes of people are turning to practices that regulate their stress levels and keep it at bay. Running has become a key activity for many following the government’s advice to only go outside for exercise once a day, while many are turning to yoga and meditation to help relieve their anxiety. Searches for ‘yoga at home’ increased by fivefold by the end of March from the start of the month.

Social distancing measures and the government lockdown have begun to put a lot of pressure on local businesses, while consumers have shown the emotional response of rallying around those in their community. Huge spikes of conversation have taken place around supporting local or independent businesses.



The opportunity for brands

At this stage, perhaps the most positive consequence of the COVID-19 outbreak has been the increased focus on community. Concerns about the wellbeing of their neighbours and the vulnerable have risen, with many people looking for ways they can help. Indeed, over 500,000 people signed up to support the NHS in helping vulnerable people in their community who are isolated in their homes during the coronavirus crisis.

We have already started to see many brands tap into this sentiment to build a sense of community and provide support to their consumers in these times of uncertainty. It is not just about brands doing the right thing, it is about them being the catalyst for everyone to do the right thing.

Giffgaff brought forward the launch of an ad campaign focused on its community that was planned to run later in the year as it looks to talk about the British spirit and togetherness amid the COVID-19 pandemic¹⁰. The Co-op scrapped their Easter ad in favour of offering financial support to a scheme to feed the hungry – FareShare¹¹.

Looking forward, consumers will continue to struggle with questions relating to self-identity, but instead of looking to stand out people will be more focused on interconnection, and the role their identity plays in the physical community around them, using digital tools to enhance this community connection, rather than them being seen as a replacement¹².



Familiar choices

People avoid risk by choosing brand and products that offer a sense of familiarity.

Anxiety and feelings of a loss of control trigger a desire to reduce risk and gravitate to safer choices – be that a trusted brand or a product that reminds them of days past. One experiment found that those who felt anxious – a feeling that results from uncertainty – were more likely to opt for a low risk or low reward choice, rather than taking a greater risk for a higher reward.

In the everyday, this might manifest as choosing to stick with the same brand of shoes, even though you know they don't last very long, rather than taking the risk of trying a new one. In fact, reliance on the familiar means that customers are less likely to accept new or innovative products or experiences, preferring to stick with what they know.

In the deeply uncertain times of a natural disaster or a pandemic this can manifest itself in people opting to stockpile products and brands they know they can rely on. It was no surprise to see a British staple, baked beans as one of the first goods to sell out from supermarket shelves in March.

As is often the case this was mirrored on social media with many people posting pictures of empty shelves. Specifically, mentions of 'baked beans' on Twitter in the UK rose by more than 85% between February and March 2020¹³.

We also know that in times of distress people want to run with the herd. This means looking to trusted sources. During election time for example many will look to their peers and obtain their news from social media, as was the case during the EU referendum.

During times of crisis, people instinctively want to know what is happening and turn to trusted news and media brands. In the UK, the BBC is by far the most used online news source. Since the beginning of the COVID-19 crisis, The Guardian had its second biggest day ever with 27.6 million unique users on the day the UK lockdown was announced, while Telegraph.co.uk is reporting a 25% increase in UK unique users and a 50% increase in page views¹⁴.

When people feel anxious, they prefer to go with what is tried and tested rather than take the risk with something new or limited in scope.

“If you make an antisocial behaviour like hoarding appear commonplace, you remove the sense of transgression, and it comes more common still. So with that, all these ads and the pictures of supermarkets with empty shelves are contributing to the problem, not resolving it. This is the big mistake.”

Richard Shotton

The consumer Covid-19 response

The desire for familiarity is fuelling the desire to consume products, activities and entertainment from an era that felt less complicated and uncertain.

Gaming is a nostalgic pastime for many, with the familiarity of a computer game you play regularly or haven't played for some time helping to offer essential escapism in these trying times. With the daily commute removed, schools closed, reduced working hours and huge numbers of the population being furloughed, many people are also experiencing much more free time at home than they have for a very long time.

Classic consoles and games have been dusted off and plugged back in, while the number of Twitch users increased by 28% from the first to 21st March¹⁵. Gaming was shown to be the most searched for category by Generation Z, with Nintendo the top searched for brand.

Increased time at home, with many unable to work, has also driven an expected increase in media consumption, with TV and digital performing well, as well as radio once again thriving. As you would expect, streaming services have seen a rise in use, with streaming the most searched for category amongst millennials and Netflix the top brand.

The need for familiarity and nostalgia has fed a resurgence in classic family friendly TV scheduling. Despite having no live studio audience, the 21st March broadcast of Ant and Dec's Saturday Night Takeaway peaked at 11.1 million viewers with an average of 9.5 million. This was an increase of 2.7 million on the series average¹⁶.

Unsurprisingly, daytime viewing has also increased. Channel 4 is taking advantage of this spike, launching new shows including a cookery show with Jamie Oliver, while The Steph Show – a new daytime format with former BBC presenter, Steph McGovern – launched on 30th March, and was brought forward in order to maximise its chances of success¹⁷.

The BBC has also tapped into this increased consumption coupled with the need for nostalgia by launching a new radio show in March. Set to be Broadcast on Radio 2, Sounds of the 90s targets millennials looking to re-live their youth through music.

There has already been a 30% increase of repeat or boxset viewing on All 4¹⁸

The opportunity for brands

This notion of trust, safety and assistance from brands continues to feed the desire of consumers to choose familiar brands. Those that they have been loyal to or that make them feel nostalgic about their past. The Drum's 'Most Connected Brands Report' revealed 31 of the top 50 brands favoured by the British public are older than 60-years-old – such as Heinz, Colgate and John Lewis & Partners¹⁹.

That doesn't, however, exclude new brands or those that don't already have a relationship with consumers. They can create feelings of familiarity by enhancing memory and sentiments from people's pasts – after all, people are more likely to spend money when they are nostalgic.

Different people will feel nostalgia for different things, and this will in part be a function of age and location, which addressable TV could be used to target accordingly.

Control seekers

People seek to regulate their sense of control through the products they buy.

So much uncertainty is caused by the high level of complexity and relentless rate of change in the world, which can make people feel out of control. The perceived lack of ability to control the ongoing pandemic continues to fuel this level of uncertainty.

People naturally want control over their surroundings in order to better manage their lives. As a result, they pursue a sense of personal control through items that will help them fix the little things in their lives.

This is a natural reaction to try to overcome the uncertainty.

For people in the UK, climate change and pollution have been front-of-mind for a number of years now. While 62% of Briton's think the government is doing too little to prepare for future crises, they can often feel that they have very little personal control over it²⁰.

This perceived lack of planning has been exacerbated by the speed of the COVID-19 pandemic. Something that felt distant, very quickly became a reality in the UK. Whilst measures that the government put in place are aimed at stemming the tide and flattening the curve, the resulting lack of control individuals have over their own lives has been thrust to the fore.

When confronted by situations beyond their control, people often look to regulate the uncertainty by asserting control over other areas of their lives.

The consumer COVID-19 Response

From the end of February to the end of March we've seen an increase in people looking to take back personal control.

People's financial futures are clearly of paramount concern. Websites that focus on financial planning have seen a 39% increase in traffic, while career advice has increased by 29%²¹.

60% of people feel the situation demands them to be even more proactive about financial planning and security for the future²¹

The notion of taking control over nutrition and weight loss has also been enhanced, with traffic to websites offering advice on these subjects by 38% and 28% respectively. Traffic in relation to home improvement has also increased by 22%²³, as people have more time on their hands at home and are looking for an activity to relieve boredom.

Home fitness has seen a huge surge as people are forced behind closed doors. While close to 50% of people agreed that working out to stay fit was important to them at the beginning of March, searches for home workouts increased tenfold from the start of the month to the end. Month on month traffic to health and fitness related websites was also up by 55% in March²⁴.

This appetite for exercise at home was further illustrated by Joe Wicks' daily live PE classes reaching over one million people on 24th March. Specifically, his YouTube channel subscribers grew by 87% week on week²⁵.

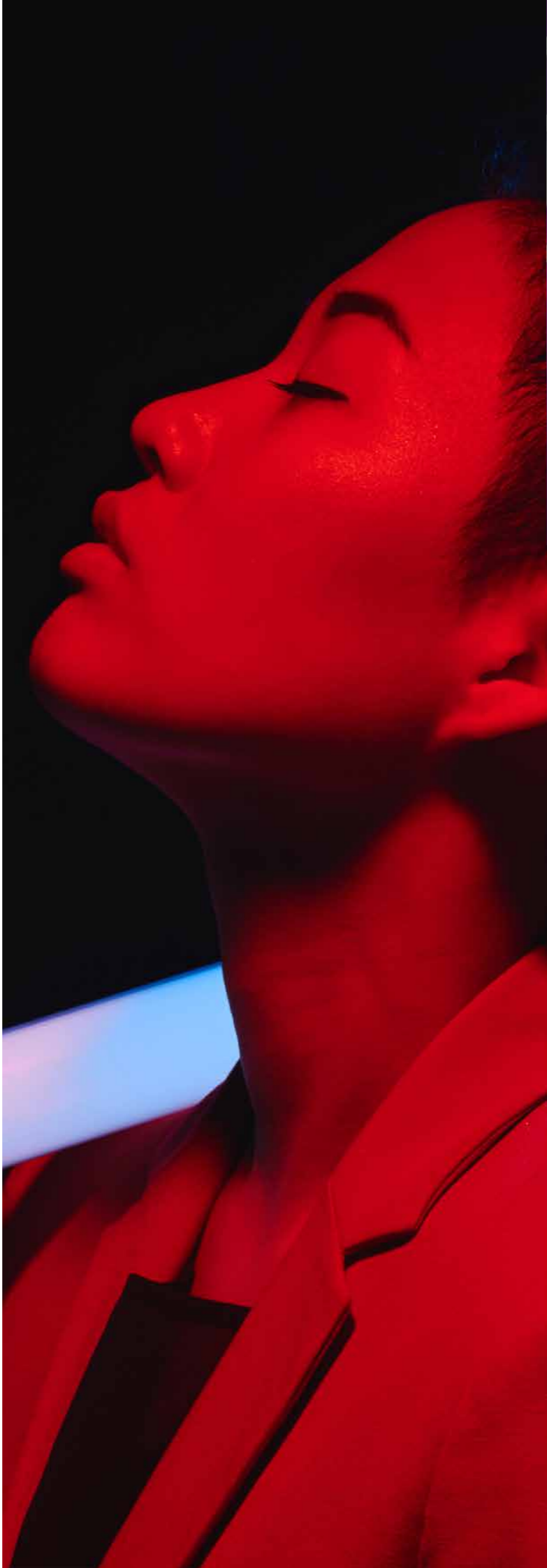
Consumers are also seeking control through an increased focus on hygienic habits which appear to have expanded into the home, with 37% of adults saying that as a result of the outbreak they had increased usage of disinfectants and household cleaning products²⁶.

Older consumers and those with children living with them are more likely to have stepped up their personal and household hygiene efforts. In the case of the former, this reflects older peoples' anxieties owing to their heightened vulnerability, while parents are usually particularly vigilant when it comes to bugs and viruses, all too aware of how quickly they spread from person to person once in the family²⁷.

The opportunity for brands

There are opportunities for brands to give people back a sense of control by helping them fix small stresses in their day to day lives.

For example, Nike has made content from the NTC Premium fitness service free²⁸ within its apps, allowing people to take control of their fitness.



Decision avoiders

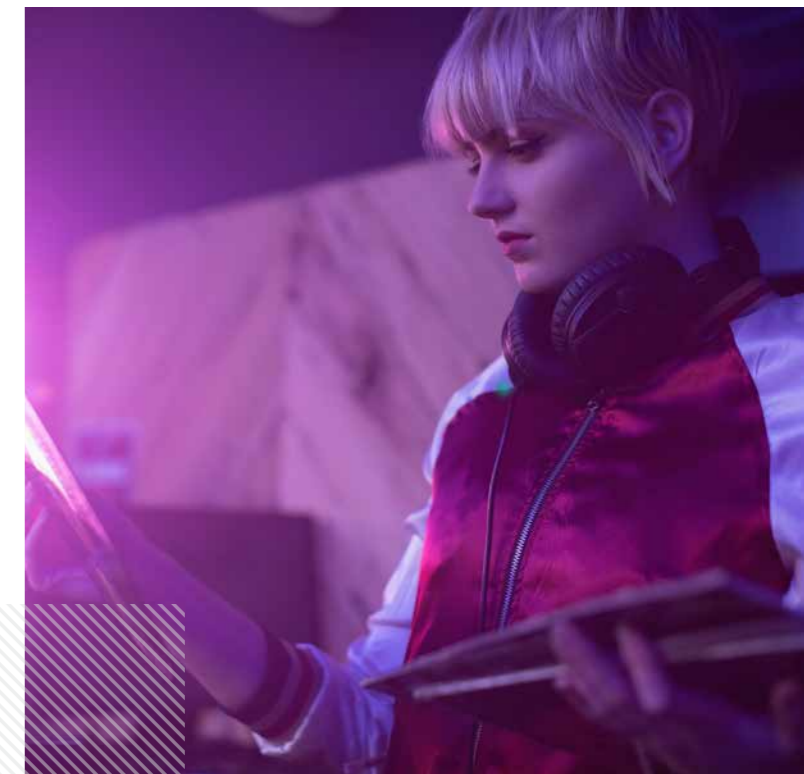
When people feel uncertain, they don't want to make decisions.

From what to wear to what to eat for dinner, everyday life is full of decisions. People have an average of 14 'small' decisions to make each day and they're time consuming. Britons spend seven hours and 36 minutes making their minds up about those small choices, with 60% of people saying they struggle to do so³⁰.

The uncertainty created from too much information can increase the difficulty in decision making. When people do take on the decision, despite being overloaded, they often experience the 'paradox of choice' – in which too much information leaves them unable to make decisions.

It means people want to delegate such decisions, stemming from a desire to avoid the responsibility of potentially making the wrong choice. In reaction, 48% of people say they'll avoid making decisions in the hope that someone else will do it for them³¹.

Data from a study in the US revealed that 42% of Americans find that they are stressed about all of the information that they need to keep track of³², while there is also evidence that an overload of information means consumers pay less attention.



The consumer COVID-19 Response

In the early stages of the COVID-19 outbreak, the World Health Organisation (WHO), reported an overabundance of information. A lot of the time, this information was factually incorrect. And while the WHO's own technical risk and social media teams worked hard to track and respond to myths and rumours, it resulted in people struggling to find trustworthy information and beginning to suffer from information overload and fatigue.

When people know that trustworthy information is being provided, they actively seek it out.

The biggest example of this was the live broadcast of Boris Johnson's address to the nation being watched by an audience of 27 million³³. To put this into context, this is a bigger audience than both the opening and closing ceremonies of the 2012 Olympics.

This further highlights the importance of government messages to "stay at home" being reiterated by brands in their marketing messages during crucial times of uncertainty. For example, Facebook announced it is giving free ad space to the World Health Organisation and is actively removing any conspiracy theories that exist surrounding COVID-19.

The opportunity for brands

Helping customers make decisions directly can be beneficial for brands and retailers. Research shows that giving people the option to delegate makes them less prone to walk away from difficult choices empty-handed³⁴.



Tapping into the change in consumer mindset

In the current time of uncertainty, people expect brands to deliver real value, to act responsibly and to do right by their community including their employees and customers.

As consumers' awareness for their own safety has heightened, they expect the same with brands on the products and services they offer. Consumer expectation has been raised

even higher, with brands needing to up their game and review how they can meet the new stringent criteria for safety, health and wellbeing.

From studies carried out across Singapore, Indonesia, Philippines, Korea, Japan and Thailand earlier this year, we know that the way brands deal with the crisis now will influence consumers in the future³⁵.

“If consumers think you're trying to exploit the situation, especially to your financial gain, they will punish you. They'll even punish behaviour that an economist thinks is absolutely logical, like increasing prices when goods are in short-supply.”

Richard Shotton



62% of Chinese consumers surveyed listed a meal with friends as their most anticipated activity. 58% said 'shopping' was their top choice.³⁷

Evaluating how COVID-19 has impacted everyday life in China, it is clear that there will be opportunities for brands at different stages in the coming months in the UK.

We've seen that as people enter lockdown, they feel threatened or scared and are looking for help to maintain what they consider to be the basics of food and shelter.

Once they become used to this reality, and they have satisfied their basic needs, they begin to look for alternative ways to regain normality and care for themselves and their families under their current constraints.

As they emerge from lockdown, they hold on to some of those new behaviours and look to re-engage with some of the things they used to enjoy and reconnect with the wider world³⁶.

The important point for brands to understand is that the decisions made during these times are both emotional and personal. It's therefore crucial for brands to be agile and plan for different types of engagement, from altruism to acceleration.

This downturn is unusual in that having a common enemy – COVID-19 – has generated a level of community spirit (toilet roll panic buying aside) that far exceeds that seen in previous times of uncertainty. If people are demonstrating solidarity in adversity, then brands doing the same thing will earn their respect.



The impact of going dark

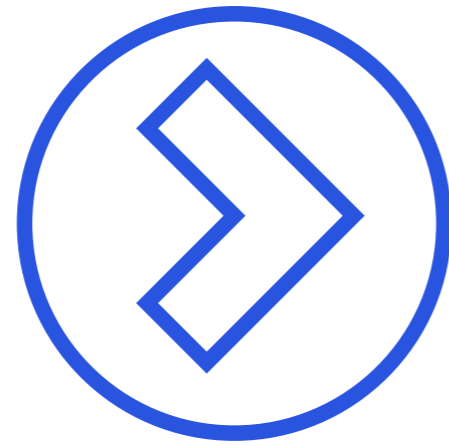


Analysis of both the short and long-term implications of cutting budgets for over 100 brands, has revealed that it may lead to a net revenue and profit gain in the first year³⁸.

However, in every case that was analysed, there was a net negative impact in the long term. Cutting advertising budgets this year will impact potential revenue generation for years to come. Even if returning to full spend levels after a year of cuts it could take five to six years for the brand to recover.

Put simply, brands that don't cut budgets during periods of uncertainty are best placed to prosper when the upturn does come.

As part of our research, we interviewed, Richard Shotton, author of The Choice Factory. According to Richard, a lot of consumer behaviour is habitual, but when the environment is destabilised as it is now, those habits are no longer quite as useful to people. They at least reconsider their motivations for purchasing and they are a bit more open to change. Brands need to be mindful of this.



At the start of March, 77% of Chinese people had already started making proactive plans for recovery. Marketers were looking at the smart use of technology to regain online traffic and connect with consumers in new and innovative ways.³⁹

33% of marketers were looking to increase investment in their ecommerce and social commerce capabilities, while 33% were looking at increasing investment in Social platforms and using live streaming broadcasts to engage with their target consumers.⁴⁰



“There is a massive opportunity for brands to capture some of that habit destabilisation. This could be either from a defensive point of view to retain existing customers because you can’t simply rely on habit in times of uncertainty. Or from an opportunistic point of view in winning new customers. Being quiet and hoping consumers continue their existing habits is a poor strategy in the face of destabilisation.”

“Most advertising is in fact long term, there is a very compelling rationale from a psychological perspective to not pull your advertising during the current climate. This is a period that you should continue to spend through, so that you are the beneficiary and not the loser from this destabilisation.”

Downturns can be a low-cost growth opportunity for brands, with falling share of voice costs. During the Covid-19 crisis, we can also add the opportunity presented by a house-bound population, growing media usage of TV, Social and online news channels⁴¹.

Conclusion

In times of uncertainty, vanilla will not do. Consumers may want to limit risk and buy what they trust but they also want more rewards. The easiest and most dangerous thing during these times, for people, institutions or businesses, is to lapse into inertia and to follow the flow of the times. In fact, people are looking for leadership – emotional leadership, consistency of behaviour and purpose, information and empowerment, and little moments of assistance that reduce the burden of life.

The most important thing for brands is to take a position of proactivity and leadership. To focus on innovating to serve these deep human needs, whatever the distractions of uncertainty within their organisations. But it must be authentic.

To deliver success in times of uncertainty brands should:

- **Take the lead from consumers**

It's important to think ahead and continue to check in with your users to understand the changing public mood and sentiment. Allow more flexibility in your marketing and channel strategy to cater for the changes of consumer mindsets, consumption behaviour and enforced lifestyles.

- **Enable future planning**

While feelings of nostalgia are important for the here and now, it's key to help consumers think of the future and enable them to plan now for what is set to come. This may include assisting them with their financial stability or re-enforcing how life will get back to normal.

- **Consider your role**

As health and wellbeing is such a paramount focus in this particular age of uncertainty, it is essential to define the impact you can have by bringing moments of calmness and joy to your audience.

- **Reinforce messaging and identify the essentials that matter**

While it's vital to reinforce government messaging, it is also essential to understand that consumers' needs continue to be individual. Be there for your customers and help them to continue to live the lives they want and to pursue their passions.

According to Richard Shotton, "brands should be thinking about tapping into reciprocity. What is it that they can do to help consumers now? It isn't about self-interest. If you do something positive now, the idea of reciprocity would be that it would be repaid at a later date."

Brands should help in a way that is consistent with their positioning, it must be done so in a way that reflects their ongoing underlying approach. This doesn't have to mean that everything is about security, safety and nurture. There are some brands whose role might be more around light relief.

So how do you put this into practice to deliver results?

1. The first step is to be genuinely data-driven and integrated in the use of data. Are we listening to what people want, and responding to their shifts in behaviour? Are we using the data we have to inform and assist the customer, rather than just ourselves?
2. The second is to commit to being ideas-led. We need to hold onto the thought that brand building is an ideas-led process, whether that's the creation of an emotional connection or simply to solve people's day to day problems. In uncertain times, strong ideas, executed consistently over time will have a gravitational pull.
3. Finally, we need to accept that sometimes the job of a brand is to be as efficient as possible, to get people what they need and get out of the way so that they can focus on the other things in their lives, and we can only do that if brands are technology-enabled.

If brands are data-driven, ideas-led and tech-enabled, uncertain times offer them a chance to take a position of leadership and reap the benefits now and in the future.

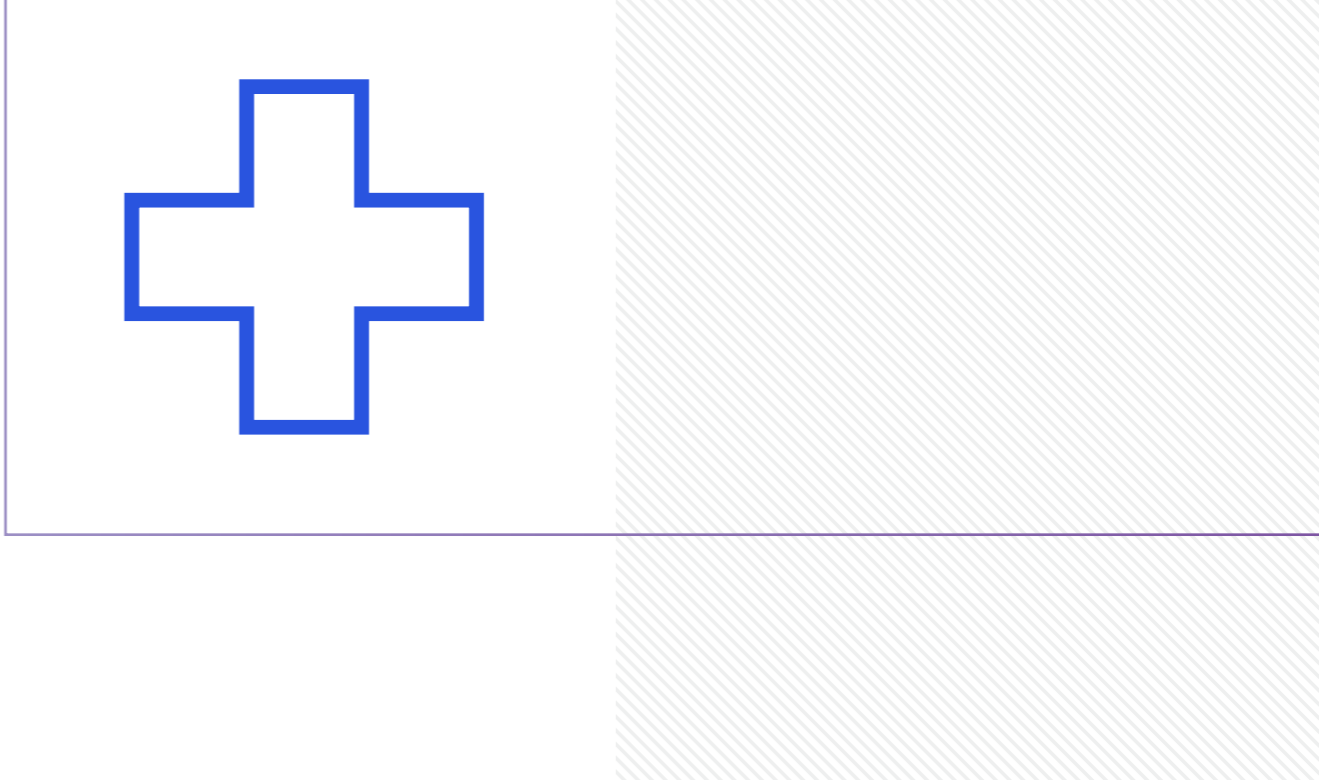


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Contributions

This document was produced in collaboration with experts from across Dentsu Aegis Network and its brands. In particular, our colleagues in B2B International and Dentsu Data Labs, provided valuable insight and content.





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