



Don't stop, the future is now

Global consumer insight on communications
during the Coronavirus (Covid-19) pandemic

Prepared by Arlington Research – May 2020

Contents

About our research project	2
Foreward	3
Methodology	4
Our findings	5
Conclusion	8
About Arlington Research and international partners	9



About our research project

The financial impact of Covid-19 has devastated global economies. As a result, the desire to hold onto cash coupled with the fear of saying the ‘wrong’ thing has spread a blanket of silence across industries, with comms spend being cut, paused or pulled altogether.

We want to reassure companies that now is not the time to go quiet, if you hope to navigate this new world we find ourselves in, so we commissioned a major piece of international research asking **13,000 consumers globally** for their insight and opinions on brand communications during the coronavirus pandemic.

The findings corroborate our belief and provide compelling evidence that ‘switching the lights off’ and saying nothing is not the right thing to do now—in fact, it’s far from it.

Foreword

“Recent events have shown us just how quickly businesses and global economies can be impacted by threats we can’t see. What we have seen as a result of Covid-19 is how—from SMEs to major corporates, right through to government bodies—global infrastructures can be rocked. The coronavirus is a pandemic some organizations may never recover from.

What companies say or don’t say during this time will be remembered for a very long time to come. Talking to clients and prospects over the past few months, I’ve heard them say: ‘we need to let the dust settle before doing any outbound comms,’ or ‘we need to keep cash within the business,’ and ‘we don’t know what’s right or wrong to say at this time so we’re keeping our cards close to our chest.’

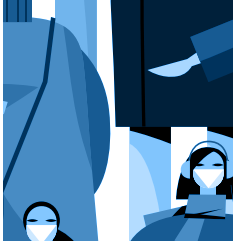
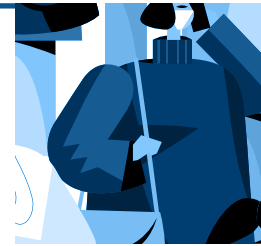
Such fears and concerns have rendered many companies speechless. But our research clearly shows people are craving content, during lockdowns especially; They want to read about topics other than the pandemic and they want to be inspired by brands. They interpret silence as a negative. Silence makes them nervous, silence concerns them and leaves them to draw their own conclusions, right or wrong.

Until the coronavirus outbreak, many companies perceived comms simply as way of announcing new products, partnerships, appointments or restructures. Comms have always enabled brands to show personality and demonstrate some humanity, but this is truer today than ever.

Your communications can show your compassion and creativity during this challenging time, inspiring your employees, customers and potential customers at the same time. If you want to come out of this crisis stronger, *don’t stop – the future is now.*”

Paul Stallard

MD of Arlington Research



Methodology

Our survey was conducted online between **23 April** and **19 May 2020**, surveying **13,000 respondents aged 18+** from a nationally representative sample for each country surveyed based on gender, age and region (+/-2%) from **14 different countries across North America, Europe and Asia:**

United States (2,500)
United Kingdom (2,000)
Germany (1,000)
France (1,000)
Italy (1,000)
Spain (1,000)
Netherlands (1,000)
Belgium (500)
Austria (500)
Portugal (500)
Czech Republic (500)
Hungary (500)
Romania (500)
Japan (500)

In the global tables, the results for the UK have been down – weighted from 2,000 respondents to 1,000 respondents so the number of UK respondents is identical to the number of respondents in other major European economies.

Our survey explored six key areas

- 1 How consumers feel about businesses that had gone quiet during the pandemic
- 2 Brand perceptions following little/no communication during the crisis
- 3 Feelings towards Covid-19 related news
- 4 How much content people were are willing to consume at this time
- 5 The brands who are successfully inspiring consumers to spend, later
- 6 Feelings towards their own company's communications throughout Covid-19

Global headlines

- Just under a third of consumers perceive no news as bad news
- Almost 4 in 10 consumers (38%) said their perception of businesses has changed during Covid-19, based on comms
- Almost half of respondents surveyed are desperate for non-COVID-19 news – regardless of age or gender
- Almost half of consumers are consuming more content than ever, at this time
- People want brands to inspire them during this unsettled period
- Employees are concerned for their future if their company has gone quiet



Our findings

1 No news means... bad news

'I worry the businesses that have gone quiet (no news or content being shared) during the Covid-19 pandemic are in financial trouble, so I am not buying from them.'

Just under a third of global consumers surveyed (31%) worry that the businesses who have gone quiet (with no news or content being shared) during the Covid-19 pandemic are in financial trouble and so are not spending with them. This is a staggering number with 39% of Italians and Spaniards agreeing with this, while 33% of Americans and 27% of Britons agree.

The feeling is also pretty mutual across the board with nearly four in ten (37%) of millennials, 34% of generation Z and almost a third (31%) of generation X in agreement. Interestingly, agreement is also higher in cities (35%) compared to rural locations (25%). Looking at gender splits, men (34%) feel more strongly about a lack of communication than women (27%), with both numbers over a quarter overall.

It's clear that without a clear communication strategy, you risk consumers coming to their own conclusions—and those conclusions might not even be right. Your business may be faring the storm but your staff and/or customers don't know it and may be reluctant to place that next order for fear you might not be able to fulfil it.

2 Just under half are desperate to hear about other non-COVID-19 news

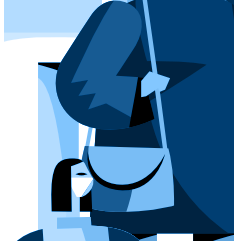
'I am desperate for some news and content that isn't related to the Covid-19 pandemic.'

Feelings in response to this question are strong. Nearly half of all those surveyed (47%) agree they want to hear non-pandemic news, with just 20% in disagreement.

The gender split is also near enough 50/50 (47% of men and 48% of women agree with the statement). Agreement is felt across the generations, ranging from 51% of millennials to 43% of the 'silent generation'. The results are also evenly split for those living in urban areas compared to those living rurally (48% agreement for urban areas versus 47% in rural areas).

Countries who are most desperate for 'other news' are Hungary (62% agreement), Austria and the UK (both 56% agreement), Germany (53%), and 47% in the US.

Can your organization's communications offer escapism from Covid-19?



3 People want more content, not less

'I spend more time consuming content now than ever before.'

46% of respondents surveyed agree with this statement, with a slightly bigger sway for men (48% agreement) than women (43% agreement). Less than a quarter (22%) disagree overall. Much of this can, undoubtedly, be attributed to lockdowns with people spending the majority of time at home, online.

From a communications point of view, there's never been a more captive audience who feel positive about being kept in touch with. This is a feeling felt across generations, not just millennials (53% agreement) but amongst half (50%) of generation Z and over a third (36%) of the 'silent generation'.

The number is significantly higher amongst city populations (51% versus 38% for rural groups) – considering those without access to a garden, communal or recreation area, who are effectively 'locked in' their urban homes. Agreement is highest in Portugal (57%), Spain (55%) Italy (51%) and the US (50%) who agree they are consuming more content than ever before, compared to the UK (45% agreement).

4 People want to feel inspired to spend

'During this crisis, brands that inspire me and give me hope are the ones I want to spend money with in the future.'

35% of all those surveyed agree they want to be inspired by brands so they can be hopeful about the future. This in turn will inspire them to spend money with these brands – when this is all over.

Again, men nudge ahead in agreement with this statement (37%), with 33% of women agreeing. This is especially true of those living in cities (39%), with the greatest numbers agreeing to the statement in the US (45%), UK (41%) and Portugal and Spain (both 40%). Millennials take the lead out of the generations (42%) followed by generation Z (39%) and generation X (35%) Baby boomers and the 'silent generation' both stand at just under 3 in 10 agreeing with the statement (29% and 28% respectively).

In summary, people want news, they want more news and they want news that will inspire them and when they are inspired they plan to spend more.

5 38% said their perceptions of businesses have changed

'My perception of businesses has changed based upon how they have communicated during the Covid-19 pandemic—good or bad.'

Incredibly, almost 4 in 10 of respondents (38%) agree with this statement with nearly 50% (47%) of Portuguese and 45% of Americans ticking 'agree'. In the UK as well, 43% agree. There is also little in the gender split (40% of men versus 36% of women). Amongst the different generations, over 4 in 10 of millennials (43%) agree their perceptions have changed one way or the other, with generation Z and X not far behind (40% and 38%, respectively).

Interestingly, perceptions are changed more in cities (42% agreement) compared to their rural counterparts (32%).

This points to getting your tone right and showing some humanity. Consumers' perceptions of businesses have changed for the better or worse, based upon how a company has communicated.

6 People are worried for their jobs

'The company I work for isn't sharing any content (news or thought leadership) so I am worried about its future after this pandemic.'

Nearly a third (32%) of respondents globally perceive that no news from their company means it's not good news for their job security¹. This is especially true amongst men (34%), and people living in cities (35%) are more worried than those in rural areas (26%) – despite it traditionally being easier to find work in big cities compared to rural regions.

Countries where agreement is highest are Japan (37%), US (35%), UK and Romania (34%), and France, Belgium and Spain (all with 33% agreement). Generation Z are the age group most concerned by a lack of communication (37% agreement), with nearly a quarter (24%) of baby boomers worried.

If we want to restore faith in our economies, it's imperative we keep employees up to date on company news, changes and the future.

¹ Based on all respondents excluding those who selected 'Not applicable to me' i.e. those who are not working for a company

Conclusion

“The coronavirus pandemic has brought about the biggest change to normal life since World War II—across the globe. But as the research has shown, brands need to stay active and in touch with their respective audiences, come what may.

There is a huge demand for content right now and engagement is at an all-time high. People are responsive to authentic and relevant content that doesn't necessarily dwell on the dark. As with any form of marketing the key is to listen, whether you're communicating with your staff, customers, community or future customers.

Either way, keep calm and stay humble. People will remember, so make sure it's for the right reasons. Consumers want to be inspired. Look at the warmth that is shown to those who get it right—the likes of Amazon (streaming free books for kids) or Pirelli's video message of hope, ‘When all this is over, we'll hit the road!’ Compare that feeling to brands who've said little or shown a lack of compassion to their employees, for example.

The majority of people who took part in our survey, of which there were 13,000 consumers from 14 countries across the world, told us that how well a company responds to the coronavirus crisis will have a huge bearing on the likelihood of buying from them in the future. Do not underestimate the ‘power of now’. Now is not the time to go stop your communications – the beginning is always today.”

Paul Stallard is MD of full-service research agency Arlington Research, UK



Top tips for striking the right balance

- Show compassion or innovation to create deeper more meaningful relationships with your audience
- Create interesting and thought-provoking content that will get traction now and in the following months
- Your tone should be consistently empathetic—keep ‘checking the temperature’ to ensure your message is respectful and always appropriate
- Audiences are embracing new platforms like TikTok, live streamed events on YouTube and Zoom conferences. While people are sympathetic, now could be a great time to experiment and try a new platform
- Give people what they need, when they need it

About Arlington Research

Arlington Research is a full-service independent market research agency. We provide clients from around the world with robust data via quantitative research, in depth exploration via qualitative research, and audits on what's out there already via desk research. All our team are director level and focused on providing intelligent analysis and creative insight that help our clients bring their story to life.

Our director-level team will design your research from sample design to final reporting. Each piece of research is reliable, robust, delivered with a quick turnaround, and analyzed to ensure the research creates maximum impact. Our scope of work is broad, and we run research for leading brands and organizations from many different sectors. We are experienced in researching hard-to-reach audiences and markets and we would love to help bring your story to life.

arlingtonresearch.global

Our international partners

UK – Berkeley Communication – www.berkeleypr.com
E caroline.james@berkeleypr.com
T +44 (0) 118 334 3745

Germany – Berkeley Kommunikation – www.berkeleypr.com/de
E florian.schafroth@berkeleypr.com
T + 49 (0) 89 74 72 62-43

France – Berkeley Communication – www.berkeleypr.com
E gilles.lyonnet@berkeleypr.com

Spain – Berkeley Communication – www.berkeleypr.com
E estela.requena@berkeleypr.com

Netherlands and Belgium – www.berkeleypr.com
E piet.van.reeuwijk@berkeleypr.com

Portugal – BeIdeas – beideas.pt/en
E sofia.alcobia@beideas.pt
T (+351) 962615717

US – Media Frenzy – www.mediafrenzyglobal.com
E sarah@mediafrenzyglobal.com
T +001 404-795-5621

Czech Republic – All Media 4 U – www.allmedia4u.cz/en
E Ondrej.hubatka@allmedia4u.cz
T +420 608 481 702

Italy – Quorum PR – www.quorum-pr.com
E Italo.vignoli@quorum-pr.com
T +39 348 565 3829



Paul Stallard

Arlington Research

100 Longwater Avenue, Green Park
Reading, Berkshire, RG2 6GP

T +44 (0)118 334 8134
E carolyn@arlingtonresearch.global
w arlingtonresearch.global
