

7th July 2020

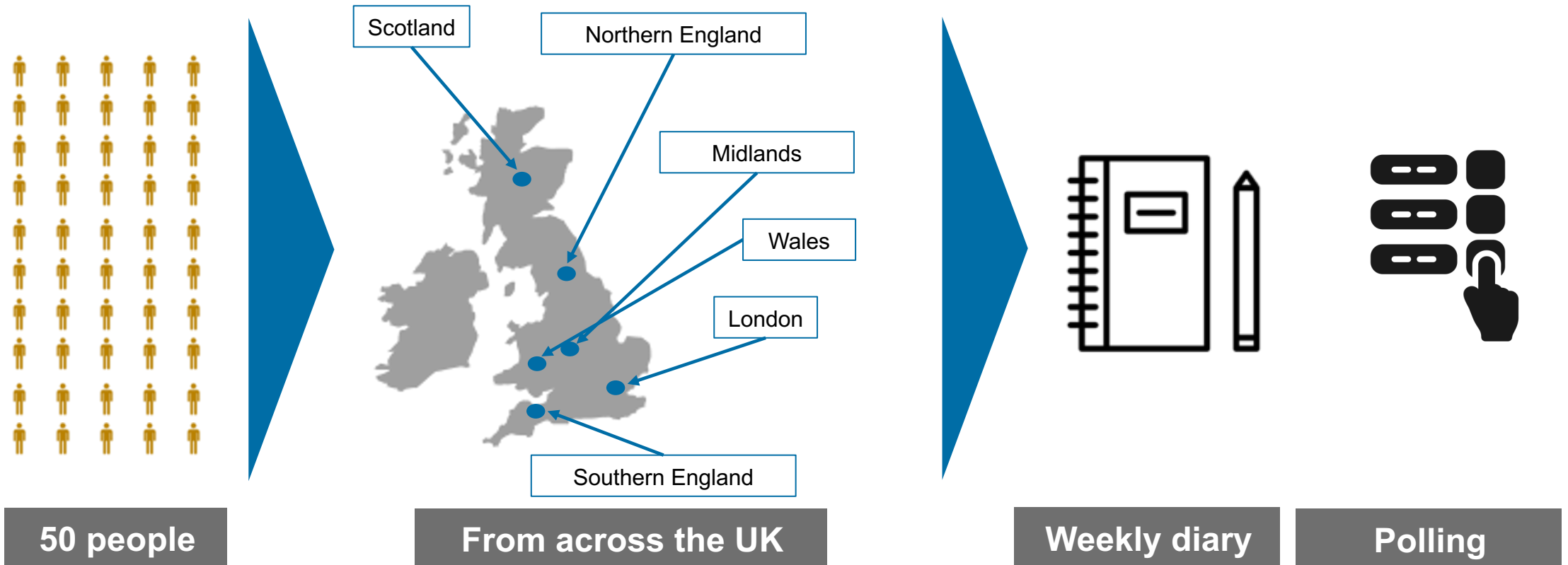
BritainThinks

Coronavirus Diaries

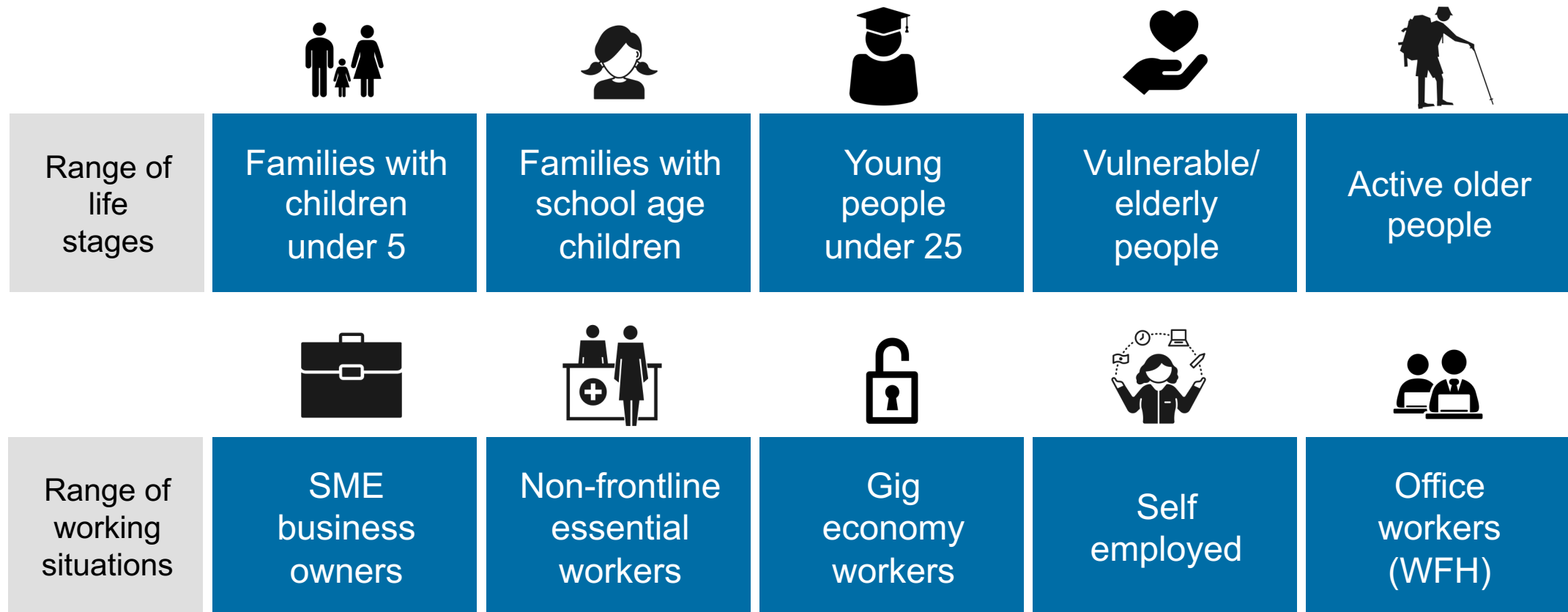
10 insights from lockdown

britainthinks.com

We want to follow this crisis as it plays out in people's lives in real time



Our Diarists come from different locations, lifestyles and backgrounds



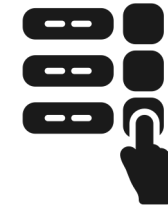
For the past 12 weeks, we've been providing weekly reports to our subscribers, combining insight from our work with published polling



Tracking questions on mood, news consumption and Government approval



Deep dives into a wide range of areas related to lifestyle, health, finances, work and behaviour



**Nationally representative polling with 2,000 UK adults
(17th-19th April & 19th- 21st June)**

This presentation offers 10 insights from a 12 week study conducted between April and June 2020.

We will continue the tracking programme over the coming months. Please let us know if you would like to receive our regular reports.

Summary

1

The public mood is volatile

2

There remains a high degree of caution

3

Lockdown has been a time of personal challenge, and personal reflection

4

As lockdown eases, unity is giving way to division

5

The crisis has led to a sharpened sense of right and wrong (and many are quick to judge)

6

Following an early rise in support, there has been a collapse in trust in Government ...

7

... and a revival of opposition

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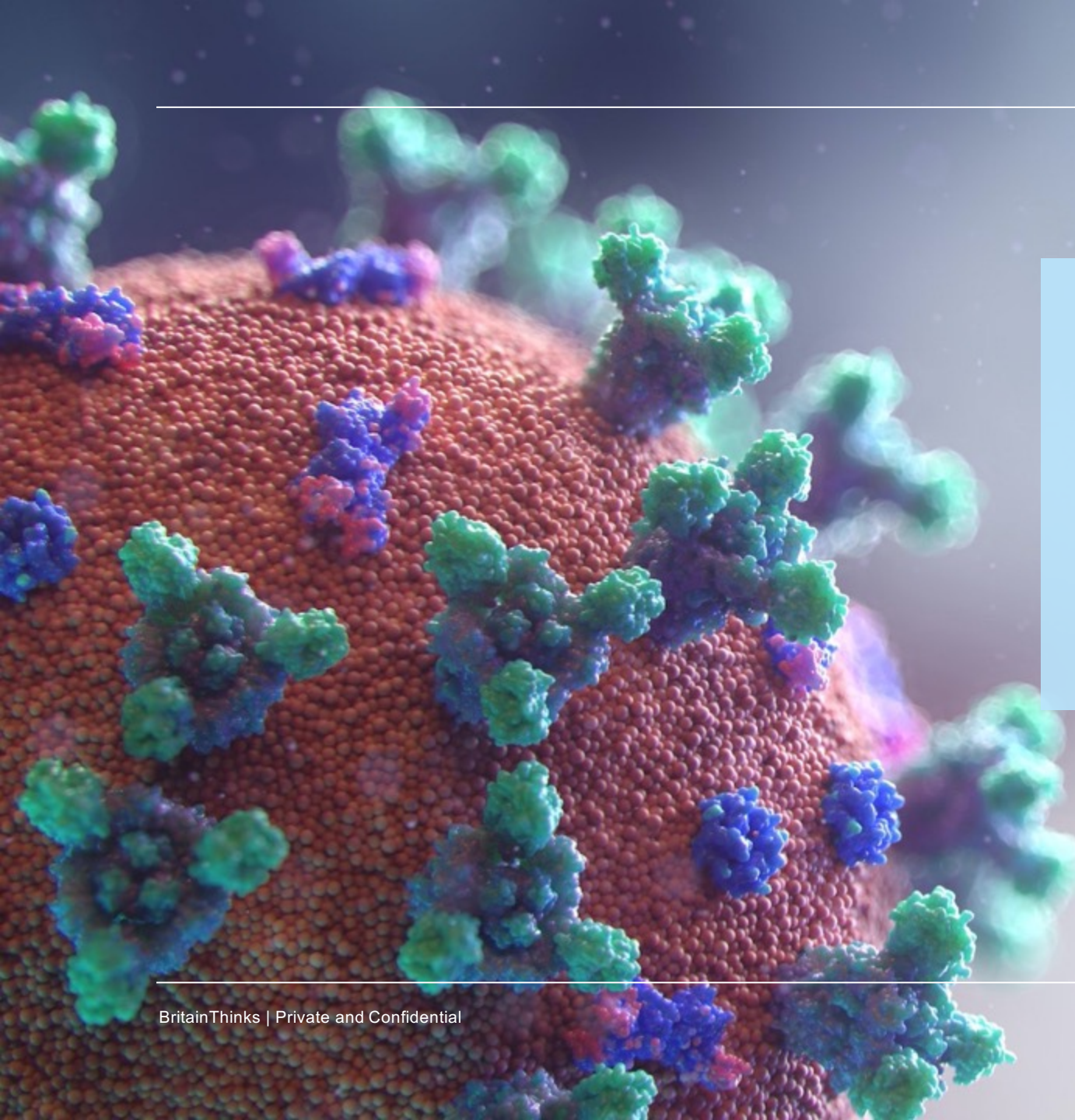
There is a desire to see good come of this

9

There is an expectation of tax rises, and no appetite for a return to austerity

10

This is a challenging time for brands – the right tone is elusive, and cutting-through is tough



1. The public mood is volatile

Every week we've asked Diarists to tell us 3 words they would use to describe their mood.

The last 12 weeks have been an emotional rollercoaster ride ...

w/c 6th April



w/c 13th April



w/c 20th April



w/c 27th April



w/c 4th May



w/c 11th May



w/c 18th May



w/c 25th May



w/c 1st June



w/c 8th June



w/c 15th June



w/c 22nd June



In the last two weeks the mood has finally turned optimistic, but anxiety is never far beneath the surface

w/c 22nd June

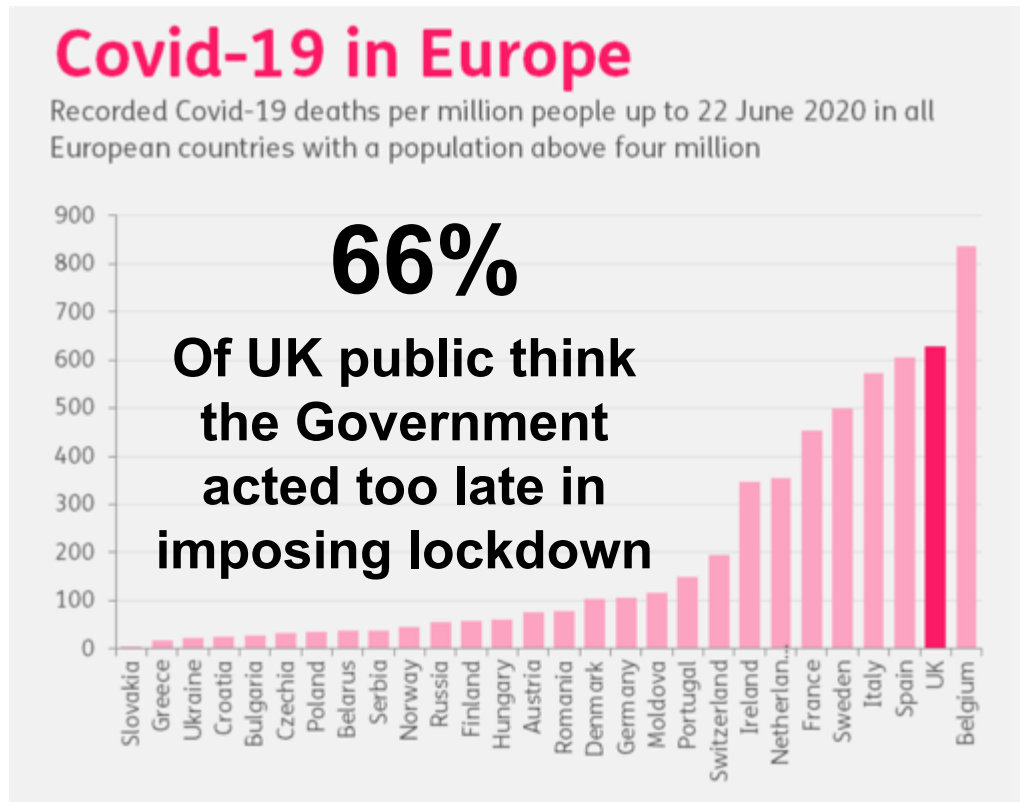
“It's nice that we have more personal freedoms and the opportunity to visit friends and family, pubs and shops; but in the background I feel a sense of dread.”

Young person under 25

w/c 29th June

2. There remains a high degree of caution

Over a 12 week period, we've seen conviction growing that the UK did not take the virus seriously enough in the early days



- As the death rate rose, Diarists became more afraid of the virus and angrier that the Government had not acted sooner

"I used to think we were doing well but after seeing a clip of how New Zealand are running, we are doing badly."

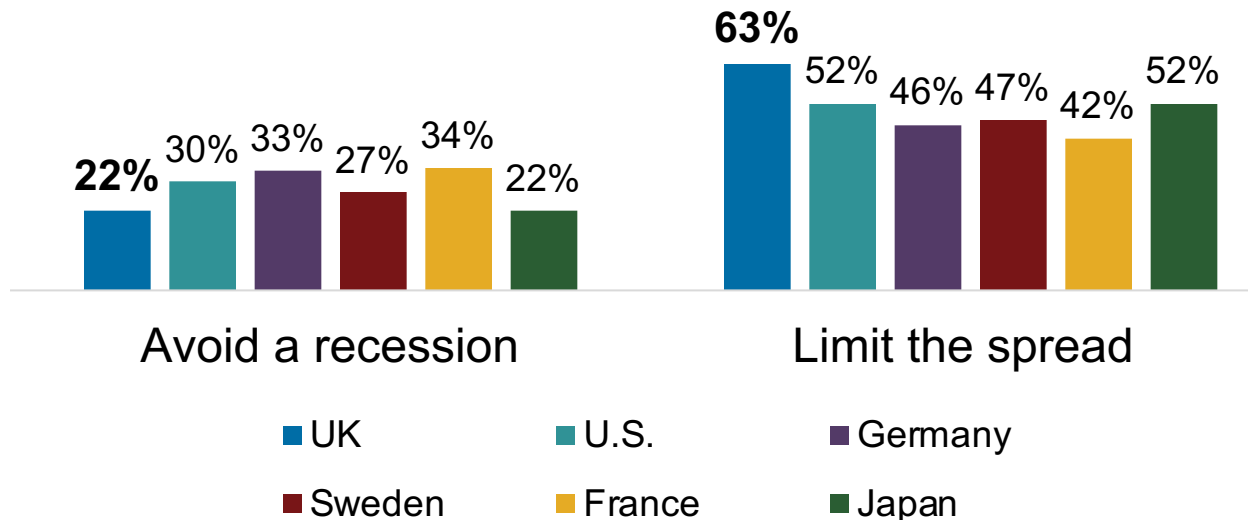
Labour Voter

"The Government should have locked down a lot sooner and also closed our borders to all travel except freight and cargo."

Conservative Voter

This is driving support for a cautious approach as lockdown eases; the public does not want to see the same mistakes made twice

*Which should be the priority for Government?
(Kekst Opinion Tracker, 1st – 5th June)*



- Polling consistently shows the UK public to be more cautious than international counterparts
- Our Diarists are clear that any relaxation of lockdown must be premised on a declining trend in cases

"I'm now a bit more worried about the economy and its recovery, but also worried that moving too soon will increase our R number."

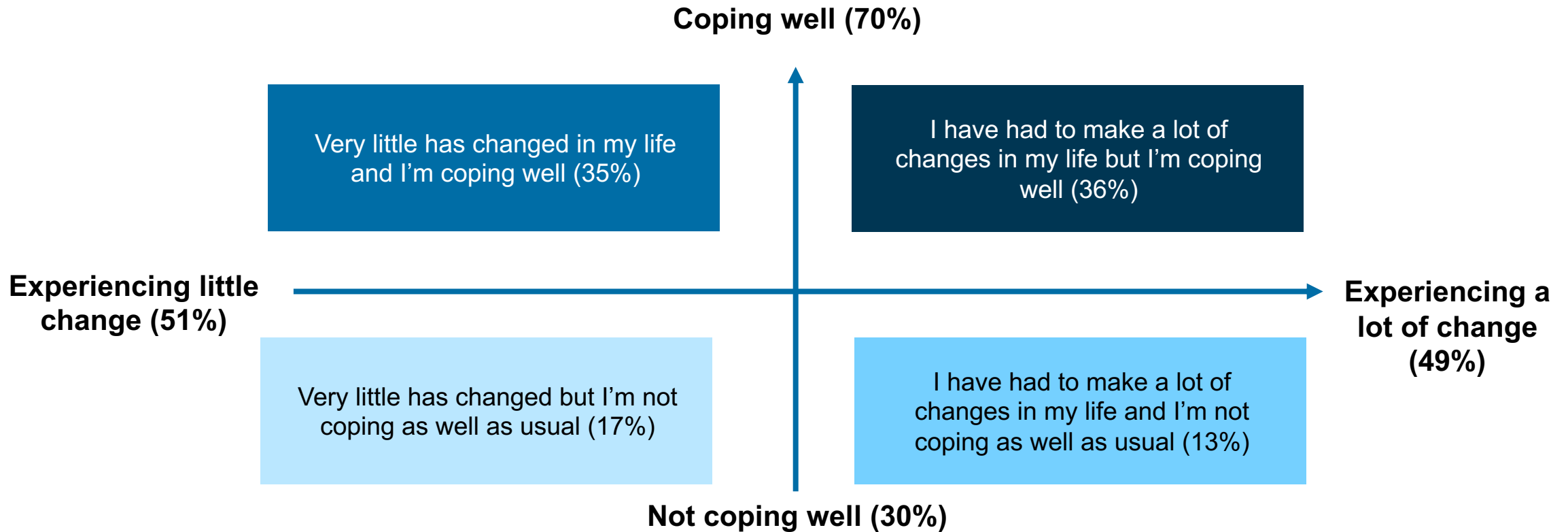
Active older person (65+)



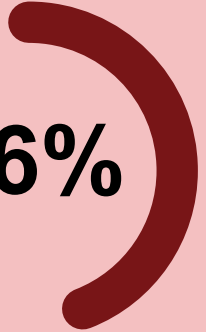
3. Lockdown has been a time of personal challenge, and personal reflection

There is wide variation in how people are experiencing this crisis

Which of the following best describes the impact that coronavirus is having on your life and how you feel?



Many are facing real financial hardship as a result of coronavirus



46%

say they are
very/fairly
concerned about
their personal
finances over the
next 12 months

Week 2

"I'm really stressed this week – I don't know what's going on with my money and work."

Week 4

"I've already wasted a lot of the savings I had, so will have to start somewhat from fresh. It's going to be difficult, I know it will be harder to find work coming out of this."

Week 12

"I'm feeling really terrible about my finances at the moment. I'm really poor and have used a fair bit of my savings."

- Many of those who faced a drop in income as a result of the crisis have been using stopgap measures to get by, but these are now largely exhausted
- Those who find themselves unemployed at this time are pessimistic about their chances of finding work

Despite this, a surprising number of people enjoyed lockdown

32%

Reported that they have been enjoying being in lockdown more than not enjoying it (46% say the opposite)

26%

Of adults say they would miss lockdown more than not miss it

Adults aged 30-59 have been enjoying lockdown the most, as have people living with others, people with higher incomes, and people living with children

From our Diarists, we can see that for many this has been a period of reflection

3 words to describe life in the UK before lockdown



"I had recently set off down a career path which I always thought was 'the start of the rest of my life' but now I think I want more flexibility and freedom for a little while."

Young person under 25

For our Diarists, there have been three key takeaways from the experience so far



The importance of
having a good
work/life balance

*"I will change my
schedule to spend less
time working and more
with those close to me."*

Office worker WFH



The importance of
having a rainy-day
fund

*"I have realised the need
to have some savings
behind me, as you never
know what is going to
happen."*

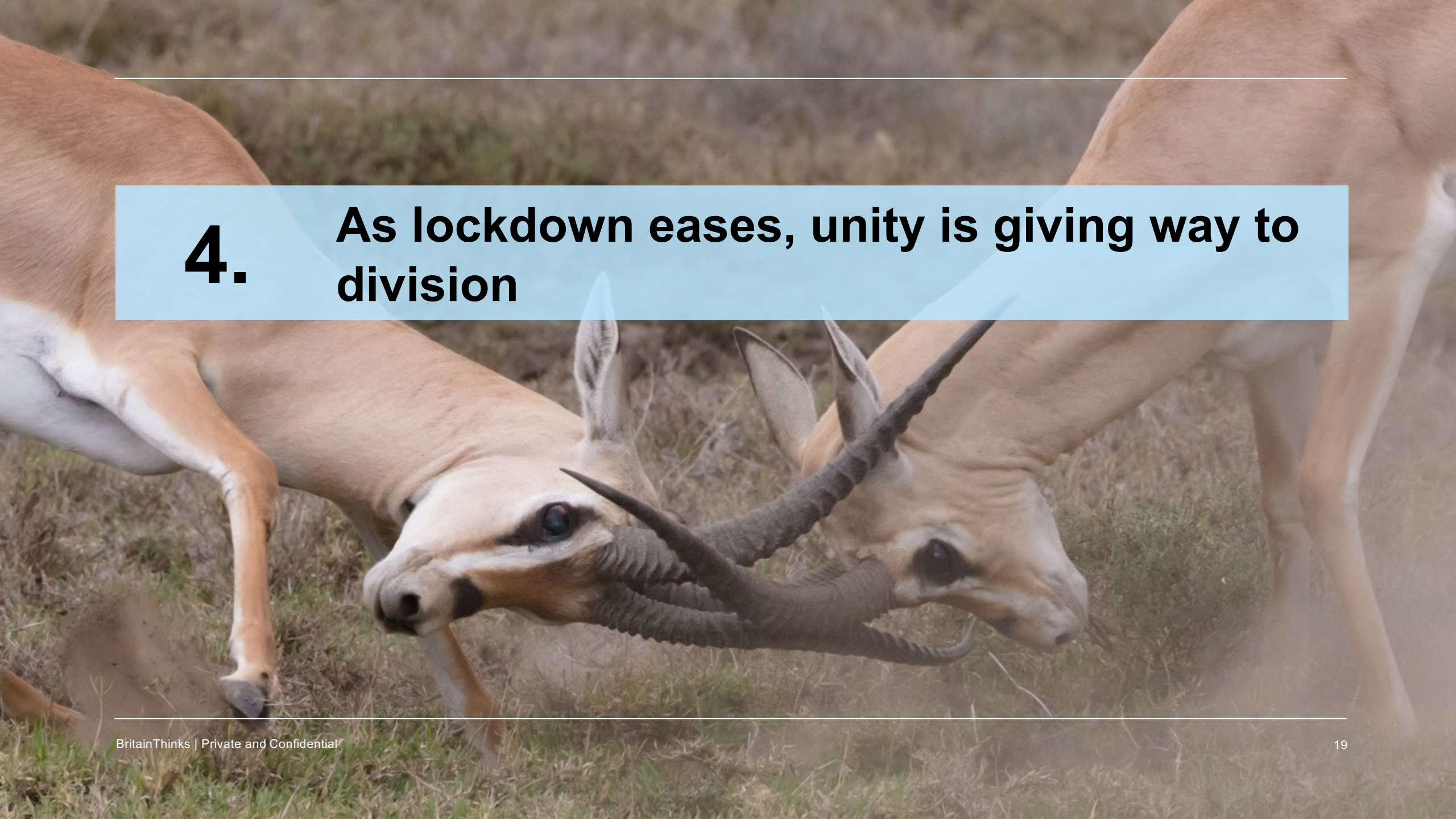
Vulnerable



The value of feeling
connected to where
you live

*"I'd like to support local
shops and local concerns
and also become more
self-sufficient."*

Essential worker

A photograph of two antelopes, likely topi, engaged in a physical struggle in a dry, grassy savanna. The antelope on the left is on the ground, while the one on the right is standing and leaning over it. They are using their long, spiraling horns to push and pull against each other. The background is a blurred landscape of dry grass and shrubs.

4.

As lockdown eases, unity is giving way to division

There was remarkable unity in the early days of lockdown

The country was united in its support for lockdown and in its admiration for the NHS

89%

**Supported
lockdown
measures**

(1-3 April)



86%

**Had confidence in
NHS to deal with
COVID 19**

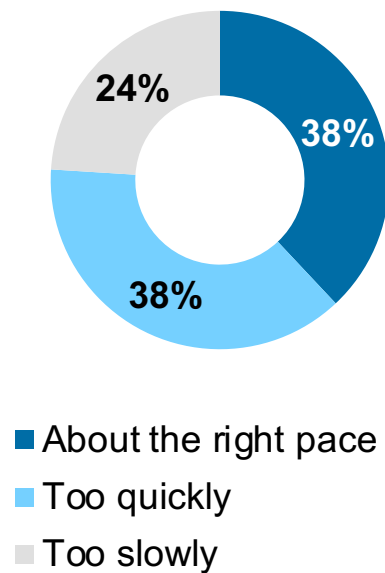
(May 15-18)

“I’m proud to be British, proud of our wonderful NHS service that has coped brilliantly.”

Essential worker

The public remain unified on the need to prioritise health, but are divided in other ways

KCL polling showing % who think the Government has relaxed restrictions in ___ way



- In our work we've seen two broad camps emerging: those who want to see a 'safety first' approach versus those who feel we should 'just get on with it'
- This is driving significant variation in behaviour, with younger people and those in precarious financial positions eager to take advantage of relaxation of lockdown, whilst vulnerable, elderly people and those whose finances have not been affected are much more cautious in changing their behaviour

"I am shielding, and will be continuing to do so for the foreseeable future."

Vulnerable

"It's amazing being able to have an overpriced coffee from Starbucks again."

Parent with children under 5



5.

The crisis has led to a sharpened sense of right and wrong and many are quick to judge

During lockdown, our Diarists showed a strong sense of personal responsibility, and a heightened awareness of right and wrong



"It's great that people are getting shopping for elderly and vulnerable people."

Essential worker



"I'm so angry about Cummings. It's one rule for them and another rule for us."

Vulnerable

Initially this led to a surge in community feeling....

When asked what they have done or seen others do to help, Diarists describe myriad small acts of kindness:



*"People have been **baking** each other cake."*



*"People are just **checking in** on each other in the neighbourhood more."*



*"We're doing a **book swap** in the close."*

*"Neighbours are **shopping for each other**, picking up prescriptions."*



*"We've been doing **daily foodbank** drops to families and the vulnerable."*



*"I'm doing **free yoga** sessions for a local mental health charity."*



40%



Say they feel more connected to their community as a result of coronavirus

...but lately community spirit has turned to suspicion as anxiety increases over how ‘others’ are behaving



72%

Say they have followed the lockdown rules more closely than the average person

“I don’t want people to put all the hard work we’ve done to waste by flaunting the rules and not keeping a 2 metre distance”

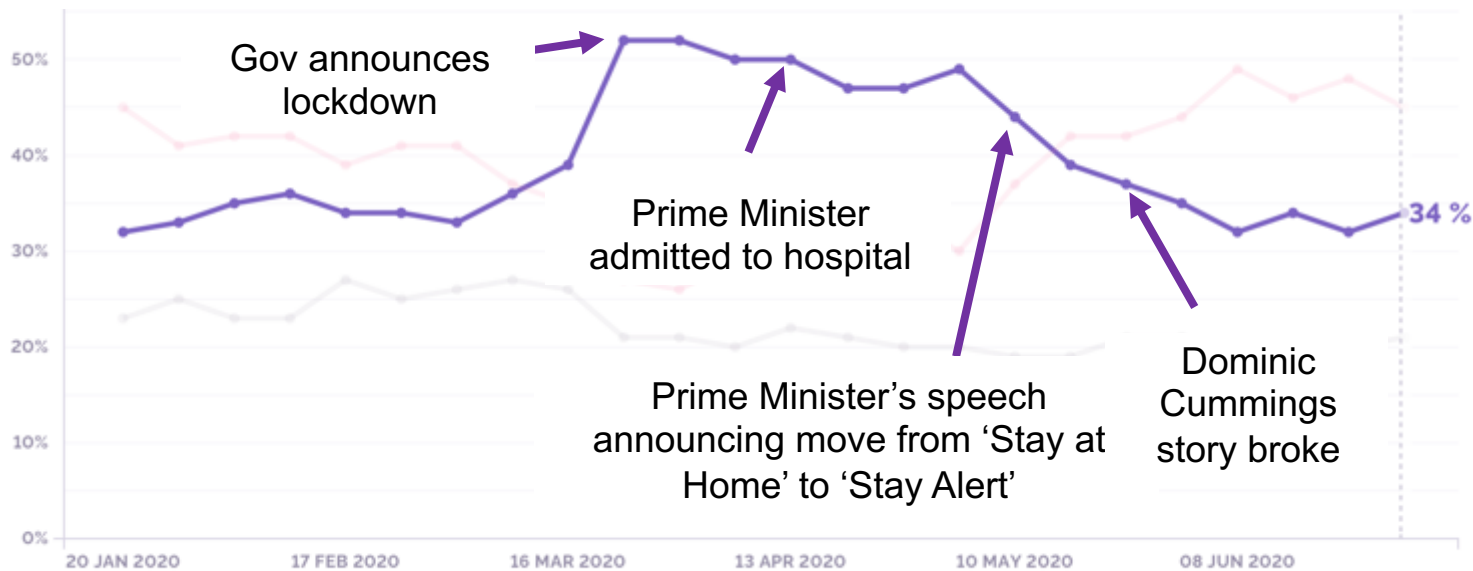
Essential worker



6. Following an early rise in support, there has been a collapse in trust in Government...

Government approval ratings rose and fell dramatically over the course of the crisis

Showing Government approval (YouGov)



Percentage of the public who think the Government has handled the coronavirus outbreak well has fallen from 61% in April to 39% in June

w/c 27th March

"I think the Government are doing well in the circumstances. They appear to be following the plan they set out and are not bowing to any media or public pressure."

Self employed

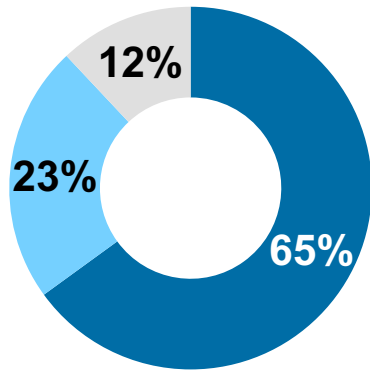
w/c 25th May

"I'm frustrated at the Government and their ever-worsening approach to the pandemic. With every new week brings a new mistake or scandal."

Self employed

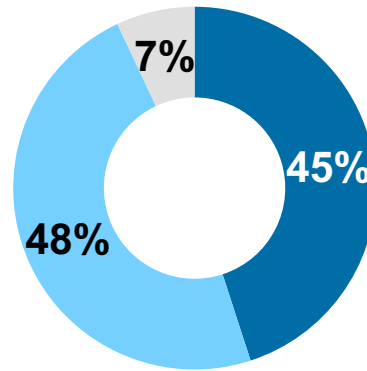
The next phase of the lockdown will be crucial in determining whether Government receives the benefit of the doubt

The Government should face a review of their handling of the coronavirus crisis



■ Agree ■ Disagree ■ Don't know

When it comes to the coronavirus crisis the Government has done as well as possible in a very difficult situation



■ Agree ■ Disagree ■ Don't know

- Many say they are willing to show understanding for past mistakes, given the scale of the challenge, but there's little room for manoeuvre ahead

"This is a worldwide problem, the likes of which has never been experienced previously."

Conservative voter

7. ...and a revival of opposition

Boris Johnson has struggled to make his mark as leader during the crisis, whilst Keir Starmer has impressed



*"Boris is Mr Bean!
He's super British,
a bit strange and
maybe doesn't
know completely
what he's doing."*

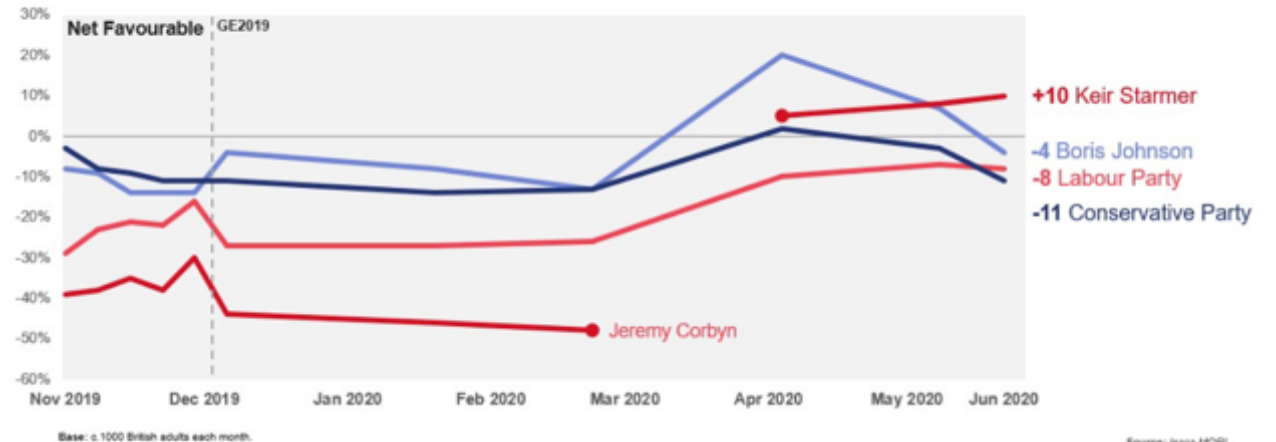
Non-voter



*"Keir Starmer is a
Phoenix rising
from the ashes of
Jeremy Corbyn's
failures."*

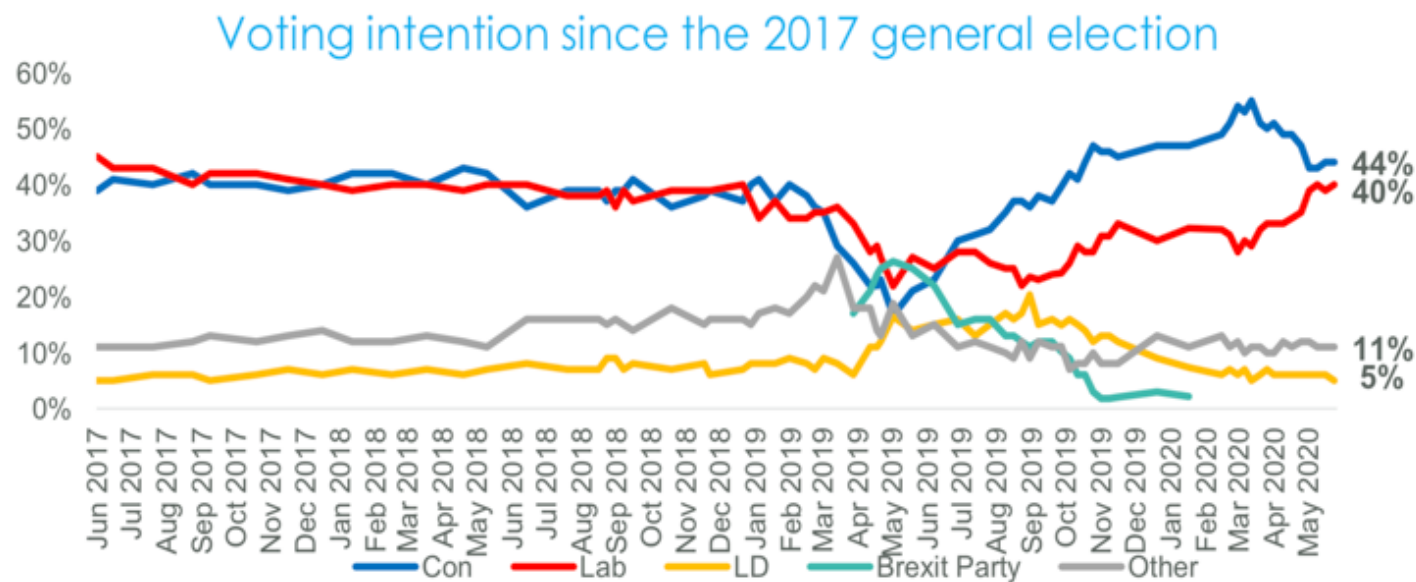
Green party voter

To what extent, if at all, do you have a favourable or unfavourable opinion of the following politicians and political parties?



Only 18% have no view on Boris Johnson, compared to 35% for Keir Starmer

The crisis has seen a narrowing of the gap between support for Labour and Conservatives



This reflects real sense of anger towards how the Government has handled the crisis, even amongst some Conservative voters

"The Government is a bit absent. Lockdown is easing, but I don't think people are confident about it."

Conservative voter

**8. There is a
desire to see
good come
from this**



There is an appetite for change. For many the worst-case scenario is that the UK returns to 'normal'



9%

want us to go
back to 'normal'
after this is over



6%

Want to return to
the same type of
economy as
before the
coronavirus
pandemic

"The worst outcome would be that we forget about it and that life returns to how it was before. No changes, nothing learned!"

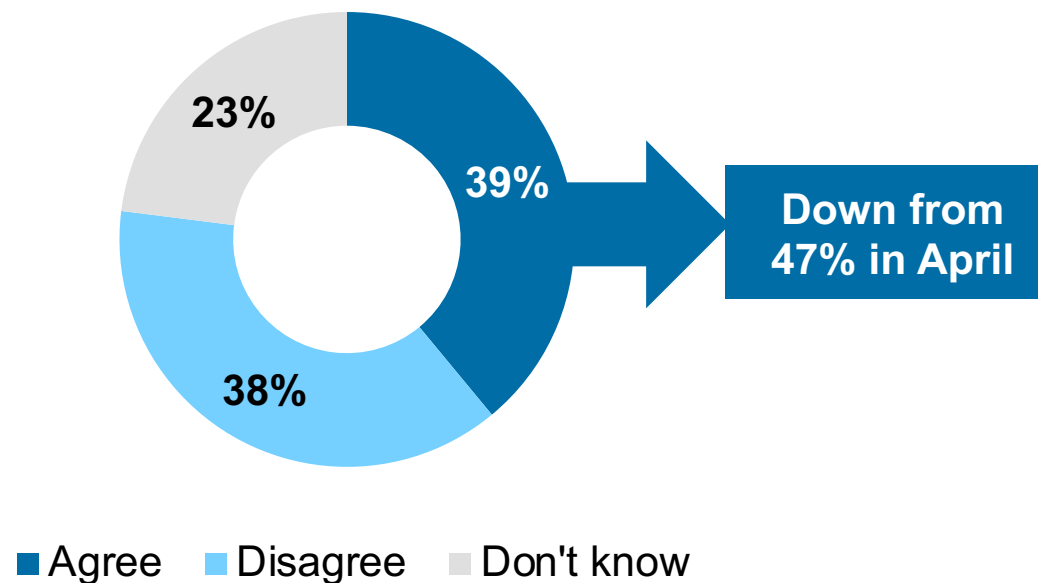
SME business owner

"Most likely is that there will not be much change. Nothing ever really changes drastically over a short period of time."

Gig economy worker

Whilst there remains some optimism that the crisis will lead to a better society, these hopes are fading as 'normality' returns

The crisis will change the country for the better in the long term



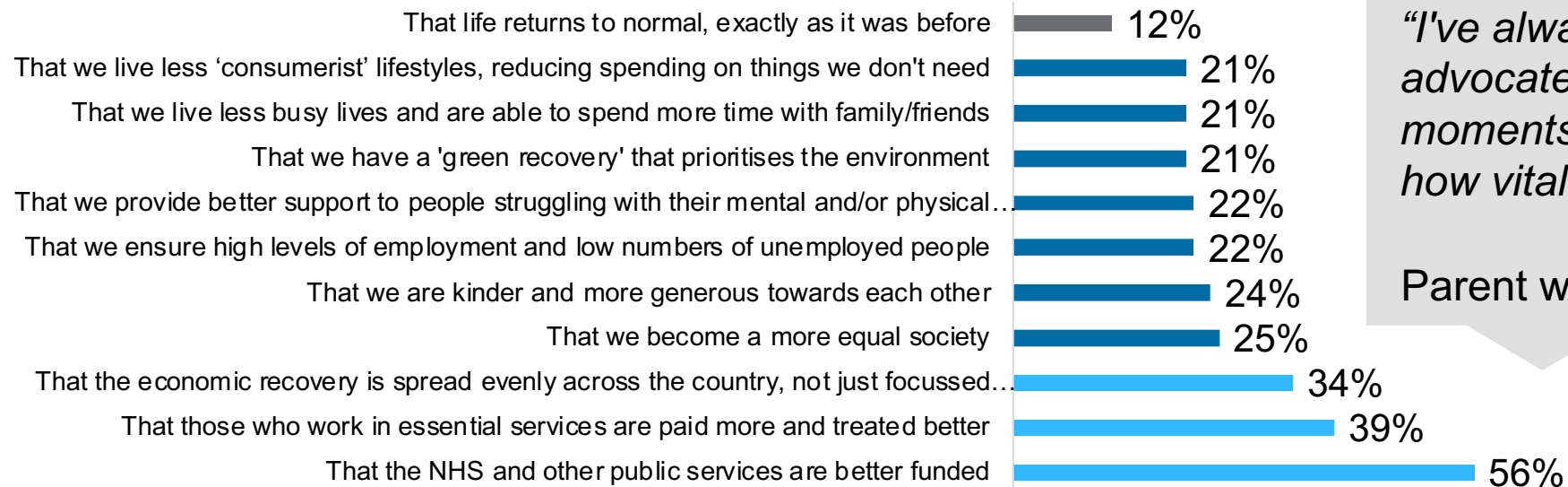
There is a strong desire for this crisis to result in something positive (but also real fear of a 'darker', poorer, future)

"I think society will be tough. The recession will cause a lot of problems but hopefully the community spirit will help us lift each other up."

Parent with children under 5

Three clear priorities have emerged: better funding for the NHS; recognition for essential workers; a geographically fair recovery

% selecting each as one of their top 3 priorities



"I've always been an advocate of the NHS and moments like this prove how vital a service it is."

Parent with children under 5

For many, the crisis has highlighted the need for more investment in public services, and laid bare inequalities in society. Better funding for the NHS, recognition for essential workers and an economic recovery that is felt evenly around the country emerge as key priorities

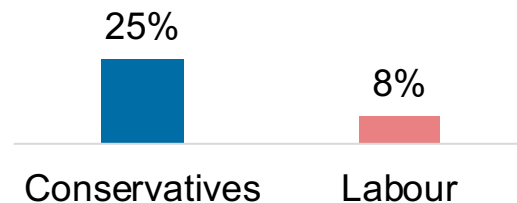
9.

**There is an expectation of tax rises, and
no appetite for a return to austerity**

Despite widespread recognition of the cost of Covid, there is little support for a return to austerity

17%

Say we should cut funding for public services in the future to pay back the money Government borrowed to respond to coronavirus



In December 2011, 60% of the UK public agreed that austerity was necessary. There is nowhere near that level of consensus now.

“Essential services are completely underfunded. We got through by the skin of our teeth. We may not be so lucky next time.”

Young person under 25

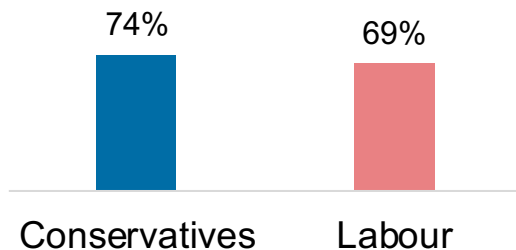
“The last 10 years has seen public services gutted in UK. It shows in our poor response to the pandemic.”

Unemployed

Whatever happens next, most assume it will mean more taxes. And many say they are fine with that...

70%

Say they expect their taxes to rise as a result of the crisis

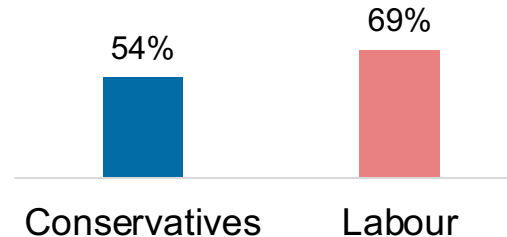


"We will have to pay more tax. It's inevitable currently, but I am personally willing to do that."

Young person under 25

60%

Say they would be willing to pay more in tax to see the NHS better funded



"I would be happy to pay more tax but this centres around the NHS and other emergency services."

Parent with children under 5

10. This is a challenging time for brands – the right tone is elusive, and cutting-through is tough

AND WE'LL GET THROUGH THIS

Brands face a challenge in getting their communications right



"I'm getting quite sick of companies saying 'now more than ever' or words to that effect during advertising. I find it very cloying."

Office worker WFH

"Don't play with my emotions. If you're helping say how."

SME business owner

- Have to acknowledge the elephant in the room but in doing so everyone ends up saying the same thing...now more than ever
- And with the mood so febrile, there's a risk of striking the wrong tone

From Diarists' responses to a series of 'Covid-19' adverts, we've identified four principles for communicating *'at this difficult time'* 🤔

Be specific rather than general

Show how your product is right for this time or show how you are helping in the crisis rather than putting out a more generic 'we are there for you' message

Have a lightness of touch

Down to earth, humorous tone resonates whilst anything that is felt to be trying too hard to tap into emotions is rejected as manipulative

Capture the zeitgeist

Show that you understand what life is like right now and tap into the commonality of the lockdown experience

Tap into hope

Looking to the future and providing a message of happier times

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Thank you

For more information:

Ben Shimshon bshimshon@britainthinks.com

Michaela Rhode mrhode@britainthinks.com

Isabel Gill igill@britainthinks.com

Katharine Allen kallen@britainthinks.com

+44 (0)207 8455880

BritainThinks

Somerset House

Strand

London

WC2R 1LA

britainthinks.com