



global

The Media & Entertainment Group

ADJUSTING TO THE NEW WORLD: MOOD, MEDIA AND BEHAVIOURS DURING THE CORONAVIRUS PANDEMIC

heart



CLASSIC fm

Smooth



POP BUZZ



AGENDA

- **THE MOOD OF THE NATION**
- **A DIFFERENT WORLD: HOW OUR BEHAVIOURS ARE CHANGING**
- **WHAT DOES THE FUTURE HOLD?**



UNDERSTANDING MOOD, MEDIA AND BEHAVIOUR DURING CORONAVIRUS

1. LARGE SCALE TRACKING SURVEY

8 surveys beginning before lockdown on 18th March amongst over 8,453 respondents

2. CONNECTED LISTENING SUMMARIES

Weekly analysis of connected listening behaviours highlighting key changes pre and post beginning of the crisis

3. CATEGORY STUDIES

Category and audience insight across categories and audiences, covering 11 different audiences and categories.

4. SOCIAL LISTENING

Social listening of our brands and how people talk about radio listening over the lockdown period

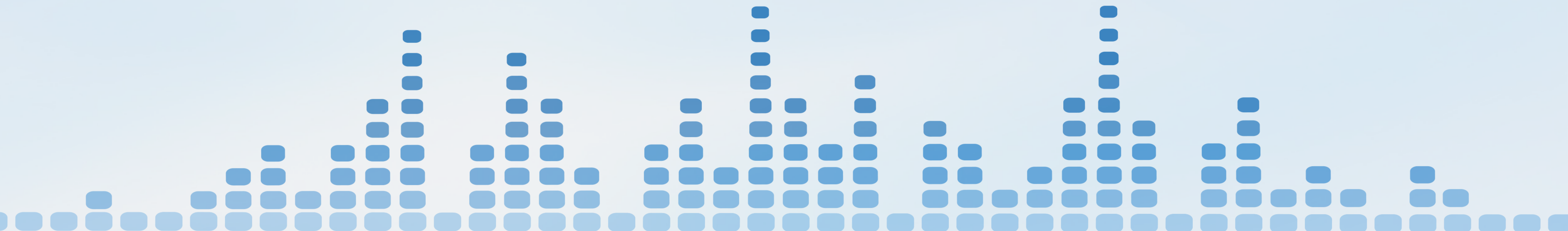


1. LARGE SCALE TRACKING SURVEY

- Results of a nationally representative survey with 8,453 respondents across the UK over 8 waves, through our fieldwork partner, Dynata
- Fieldwork has taken place between 18th March and 15th June
- Survey covered:
 - Feelings about coronavirus and current situation
 - Changes in behaviour as a result of the virus
 - Changes in media consumption
 - Needs from and perceptions of radio coverage
 - Behaviours and going out
 - Activities looking forward to
 - Brand reactions to the crisis
- Data are weighted to be representative of the population



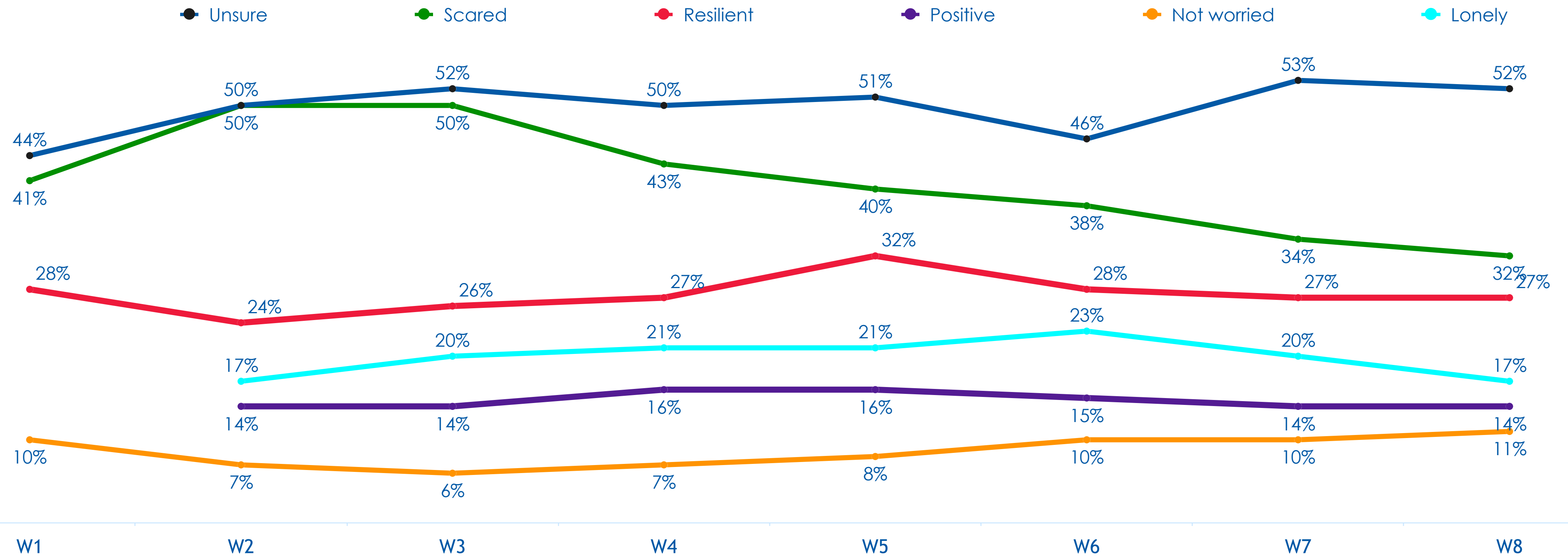
THE MOOD OF THE NATION



THE MOOD OF THE NATION

UNCERTAINTY NOW RULES AS LONELINESS DROPS BACK

Q1. First of all, how are you feeling about the Coronavirus Pandemic?



Note: Lonely and positive not included in W1

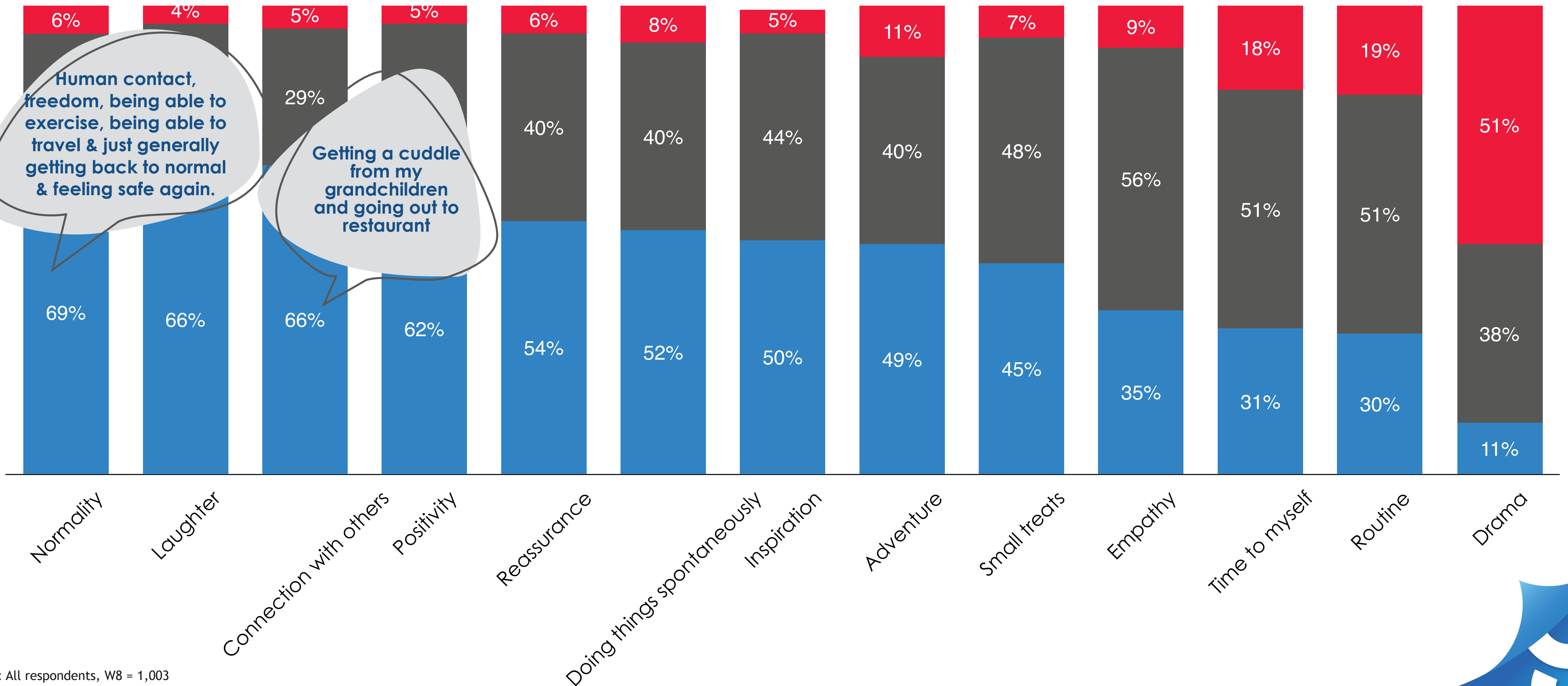
Base: All respondents, W1 = 1,023, W2 = 1,047, W3 = 1,047, W4 = 1,080, W5 = 1,095, W6 = 1,061, W7 = 1,096, W8 = 1,003

THE MOOD OF THE NATION

AS RESTRICTIONS LIFT THE NATION LOOK FORWARD TO RETURNING TO A SENSE OF NORMALITY AND CONNECTION WITH OTHERS

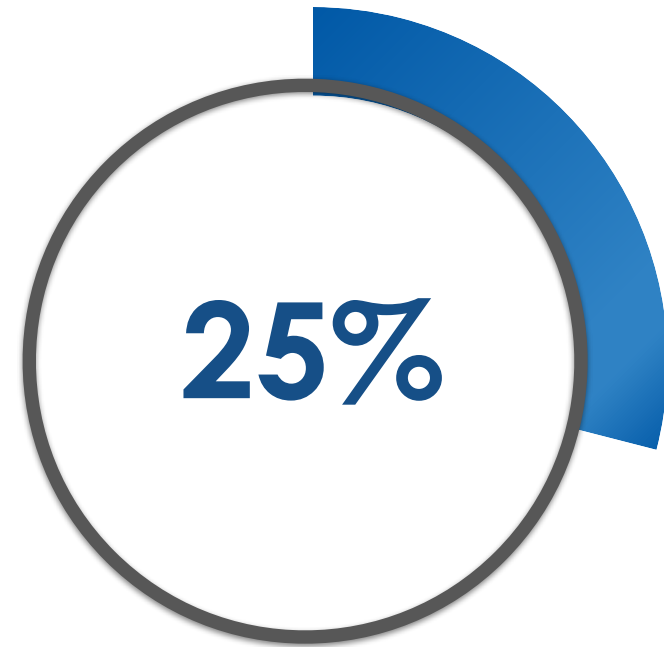
Please tell us which, if any, of these you'd like more of, which you'd like to feel less of and which you feel are about right for now.

■ Would like more of ■ Just the right amount ■ Would like less of

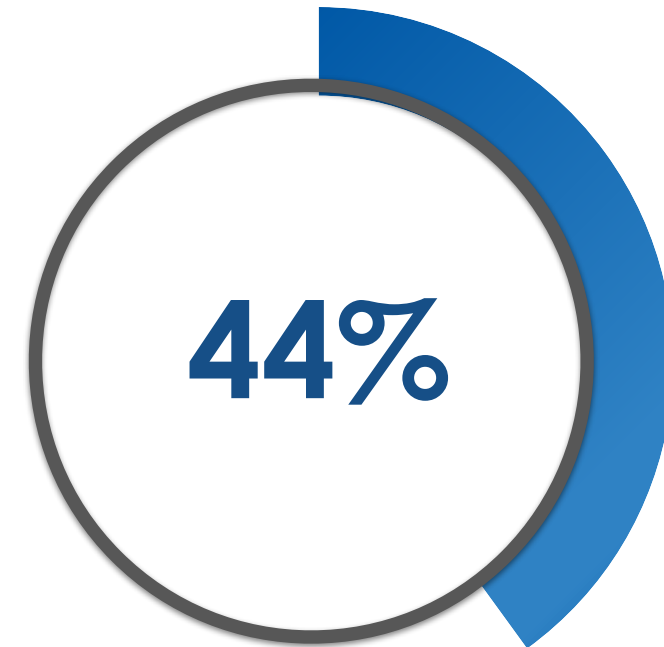


NEWS FATIGUE IS NOW ESTABLISHED

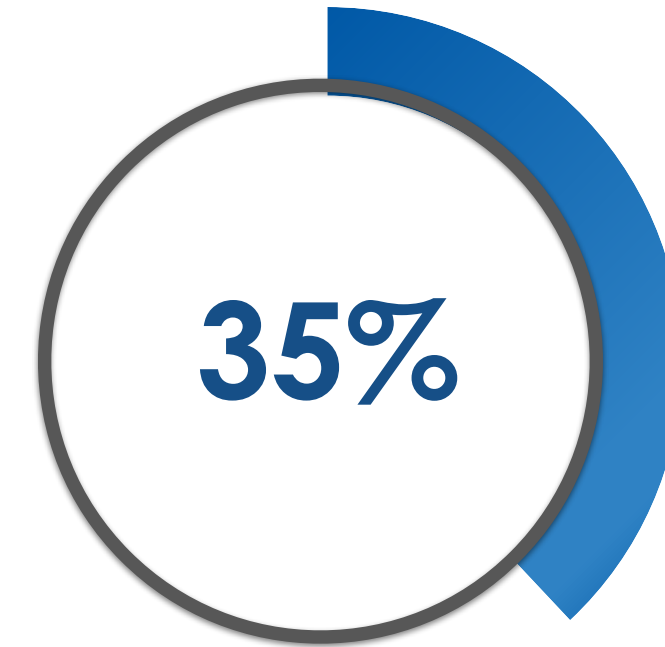
Q2. On a scale of 1-5, where 1 = completely disagree and 5 = completely agree, please tell us how much you agree with each of the following statements.



**ARE STILL HUNGRY
FOR NEWS ABOUT
CORONAVIRUS**



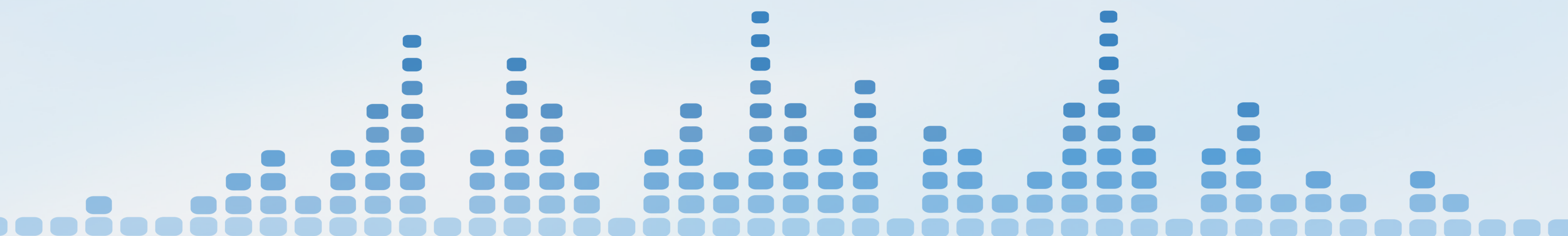
**ARE JUST LOOKING
AT HEADLINES NOW**



**AGREE THEY ARE
BORED OF NEWS
ABOUT
CORONAVIRUS**



A DIFFERENT WORLD: HOW OUR LIVES AND BEHAVIOURS ARE CHANGING

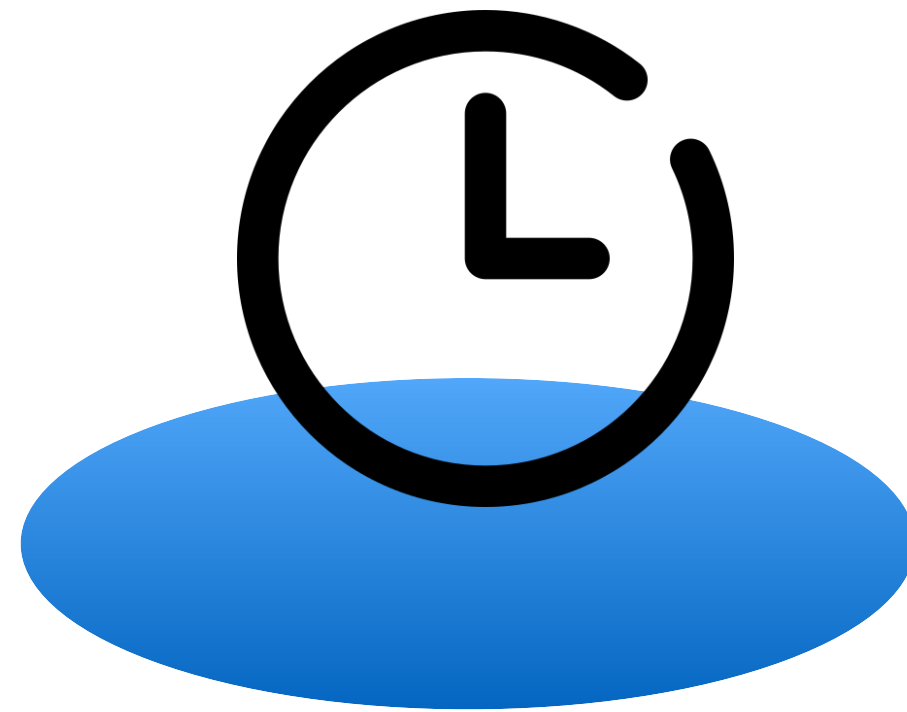


A DIFFERENT WORLD

CHANGES IN....



**MEDIA
CONSUMPTION**

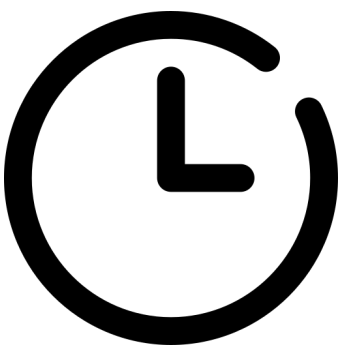


**HOW WE SPEND OUR
TIME**



**HOW WE SPEND OUR
MONEY**

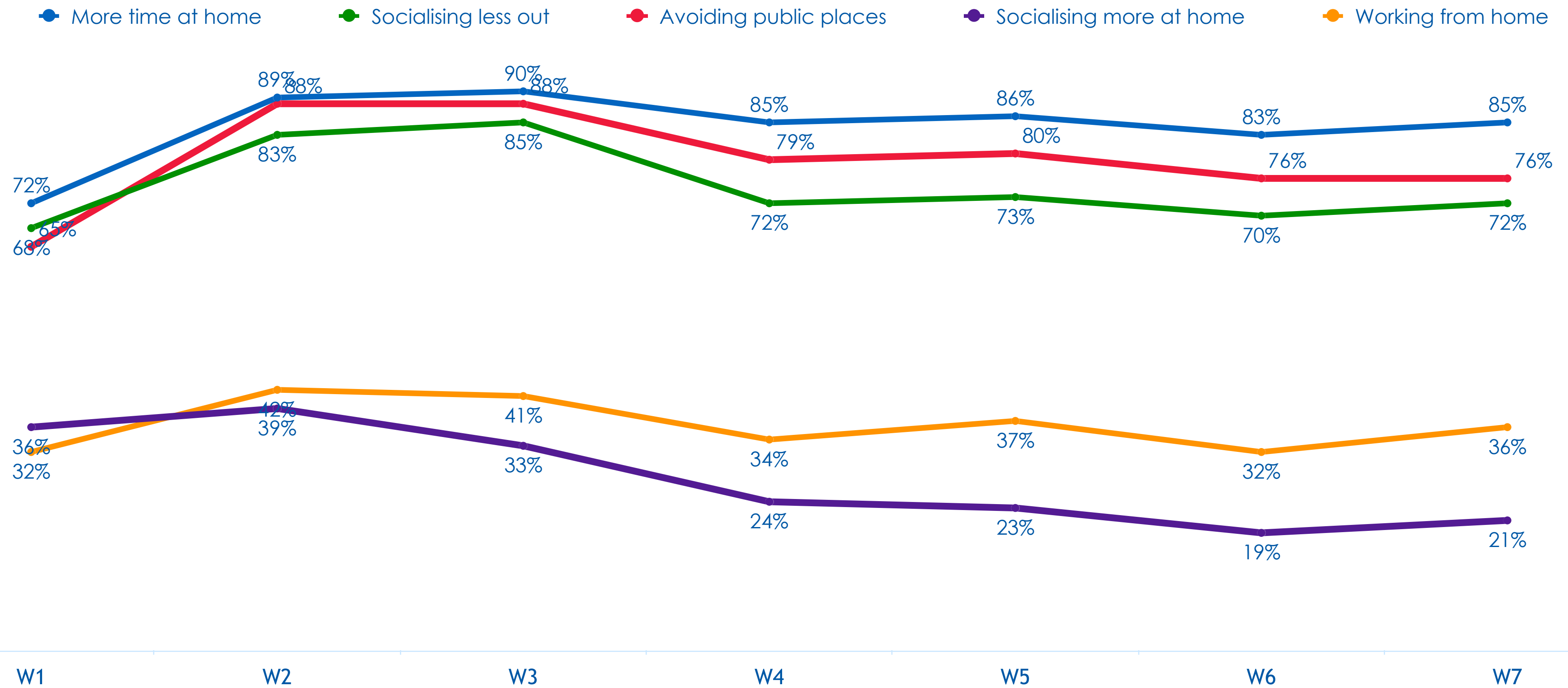




OUR BEHAVIOURS HAVE STABILISED SINCE LOCKDOWN

Which of following are you have you done or are you currently doing due to coronavirus?

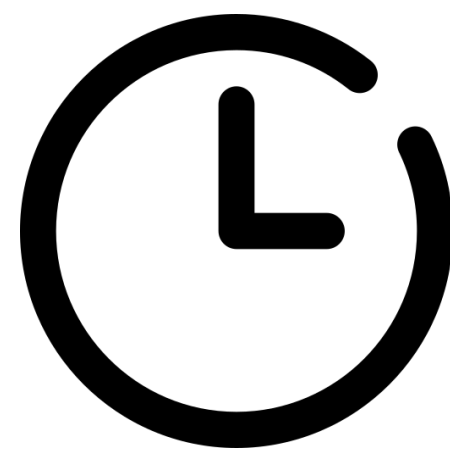
Have done already



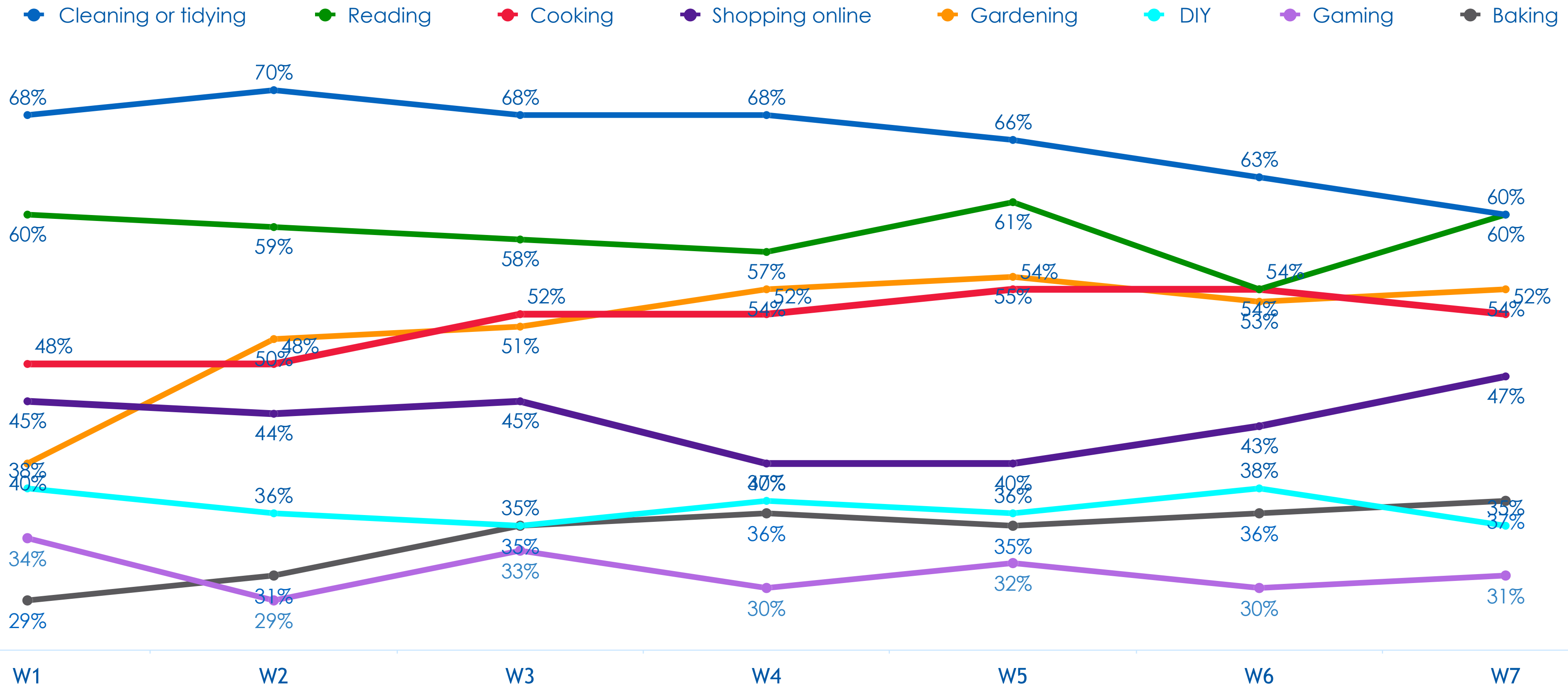
Base: All respondents, W1 = 1,023, W2 = 1,047, W3 = 1,047, W4 = 1,080, W5 = 1,095, W6 = 1,061, W7 = 1,096, W8 = 1,003

A DIFFERENT WORLD

TIME AT HOME



You said that you thought that you would be spending more time at home. Which, if any, of these do you think you might be doing more of with the spare time you have?



Base: All who expect to be spending more time at home.



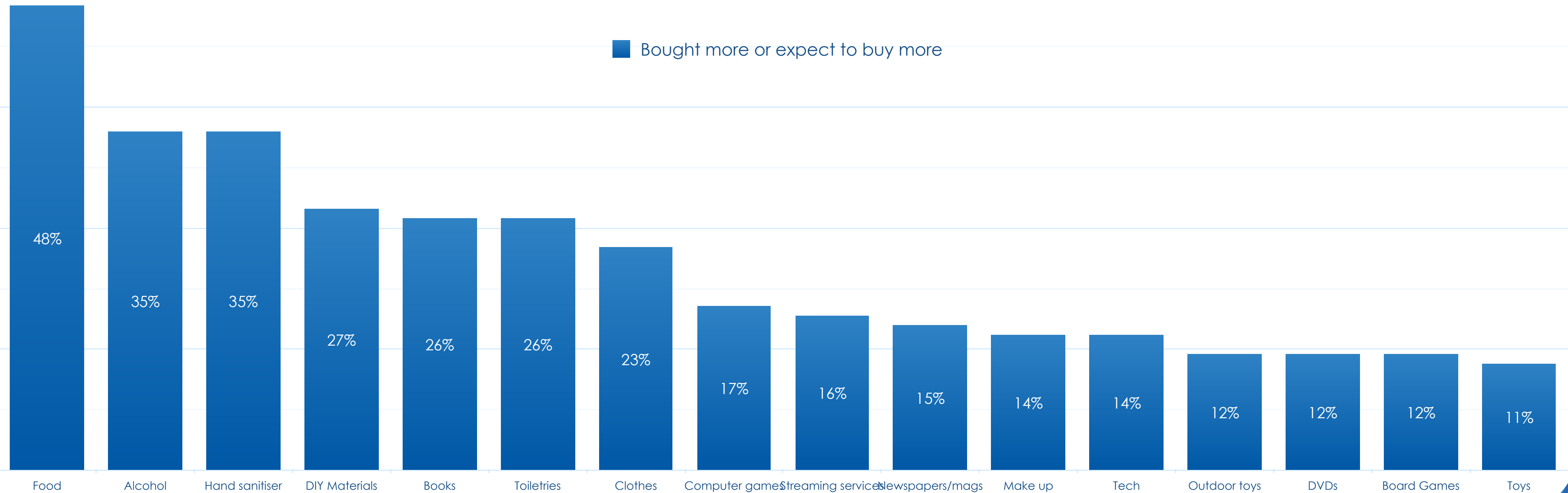
MANY CATEGORIES ARE SEEING A BOOST IN TERMS OF ACTUAL AND EXPECTED SPEND

Which of the following have you bought more of than usual in the past week and which do you think you will be buying more of than usual in the coming weeks...?

69%

Have spent more in at least one category in the past week

Base: All respondents (1,096)



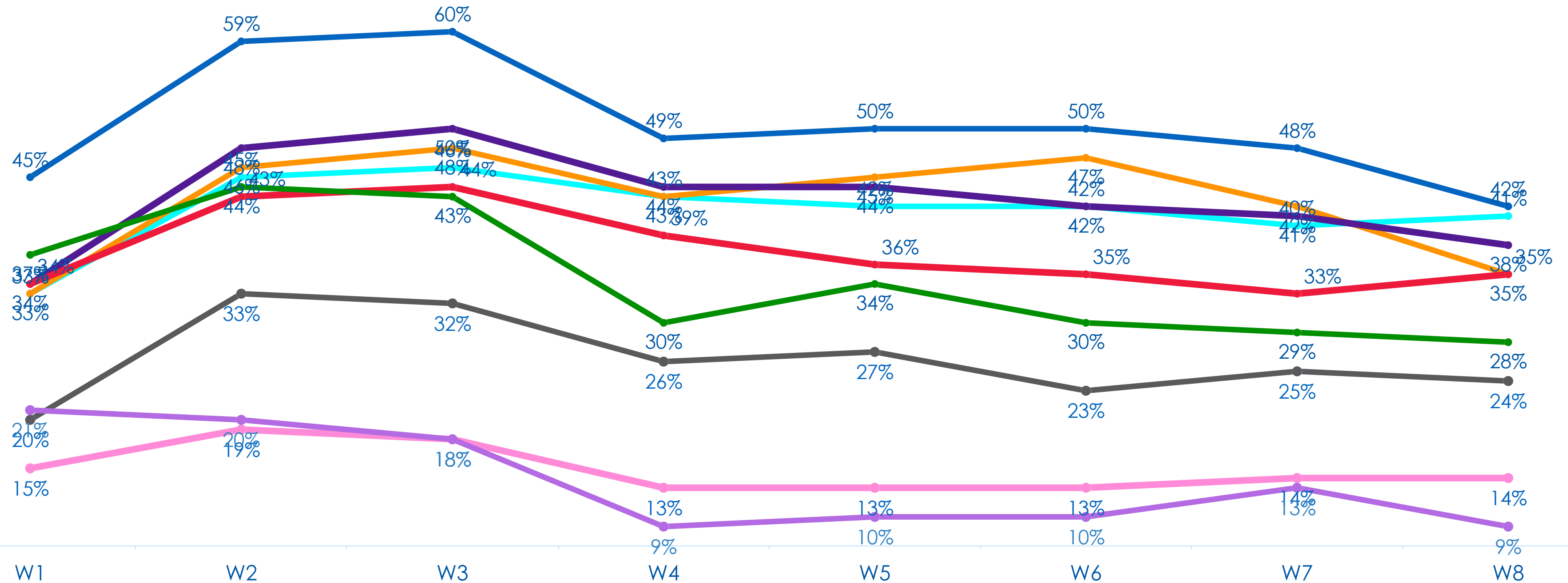


MEDIA SEES INCREASED CONSUMPTION

Which of the following do you think you have done more of this week compared to normal.

- Live TV
- News online
- Radio
- Social Media
- Catch up TV
- Streaming video
- Physical newspapers
- Music streaming
- Podcasts

Increased Consumption





A DIFFERENT WORLD

RADIO INFORMS, REASSURES AND DISTRACTS

Which of the following do you think you have done more of this week compared to normal.

37%

Have listened to more radio since the start of the pandemic

Base: All respondents (1,096)

Radio

Increased consumption



W1

W2

W3

W4

W5

W6

W7

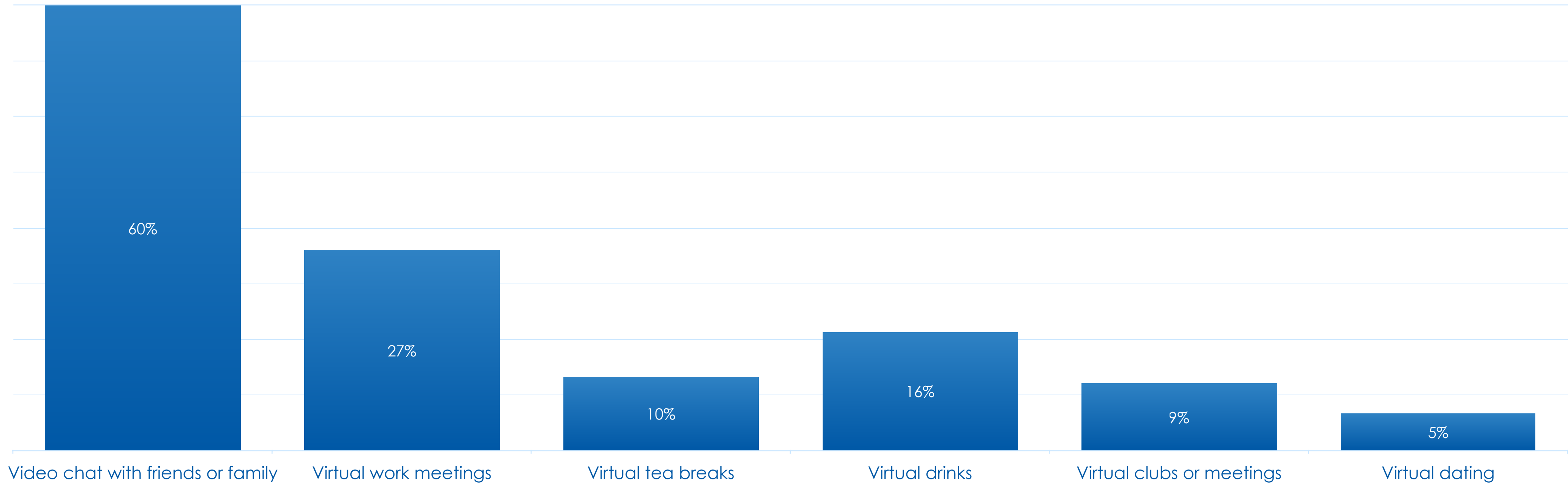
W8

A DIFFERENT WORLD

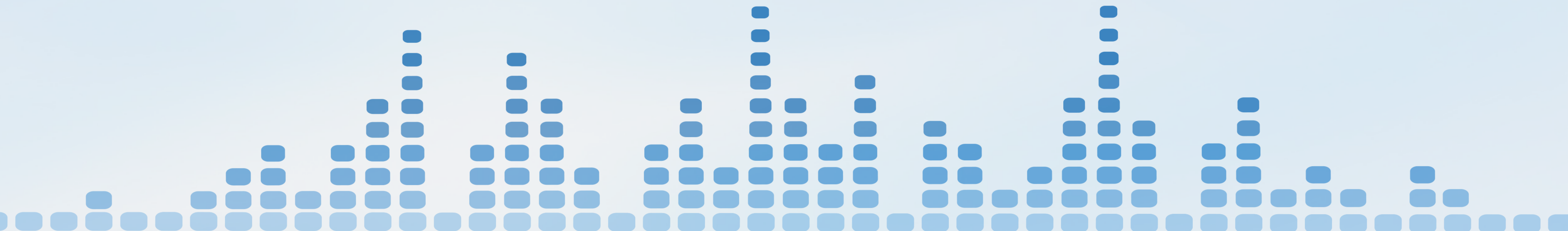
KEEPING IN VIRTUAL TOUCH

Please tell us if you have done any of the following since we have had less contact with the outside world:

74% Have kept in contact with others online since lockdown, up significantly from 70% in the past 4 weeks



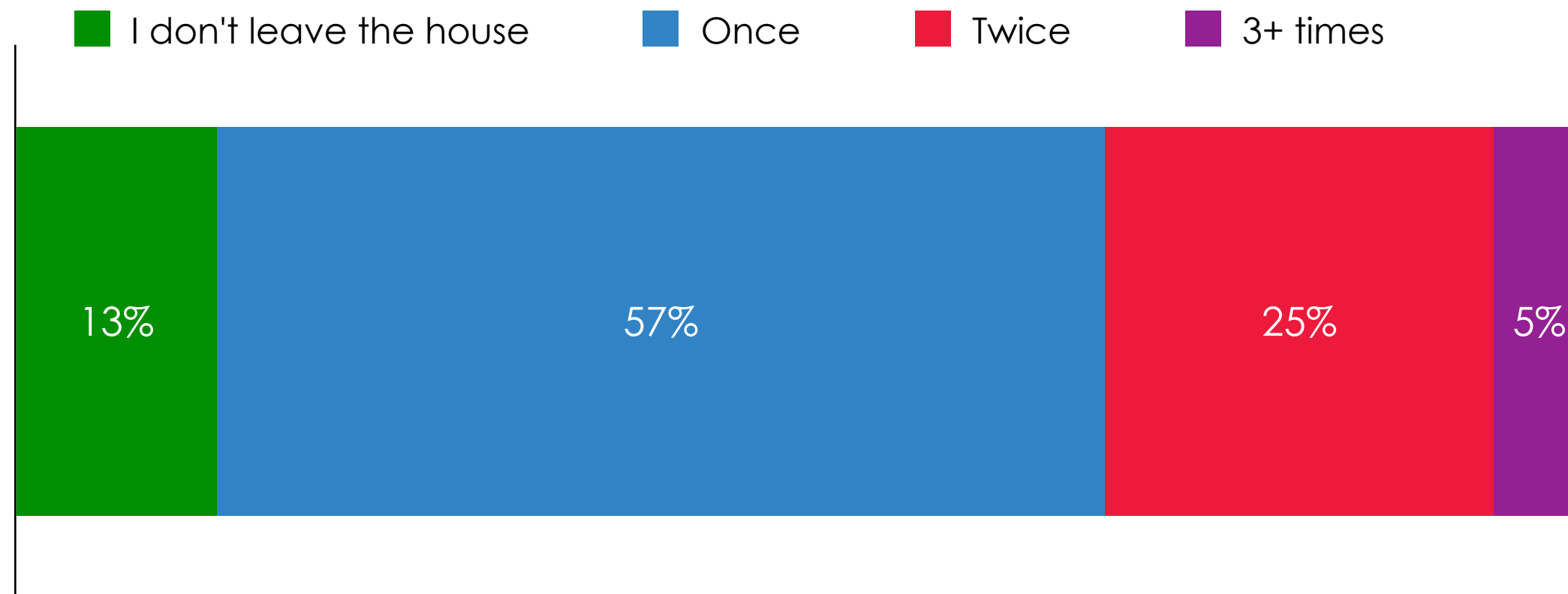
WHAT DOES THE THE FUTURE HOLD?



THE FUTURE

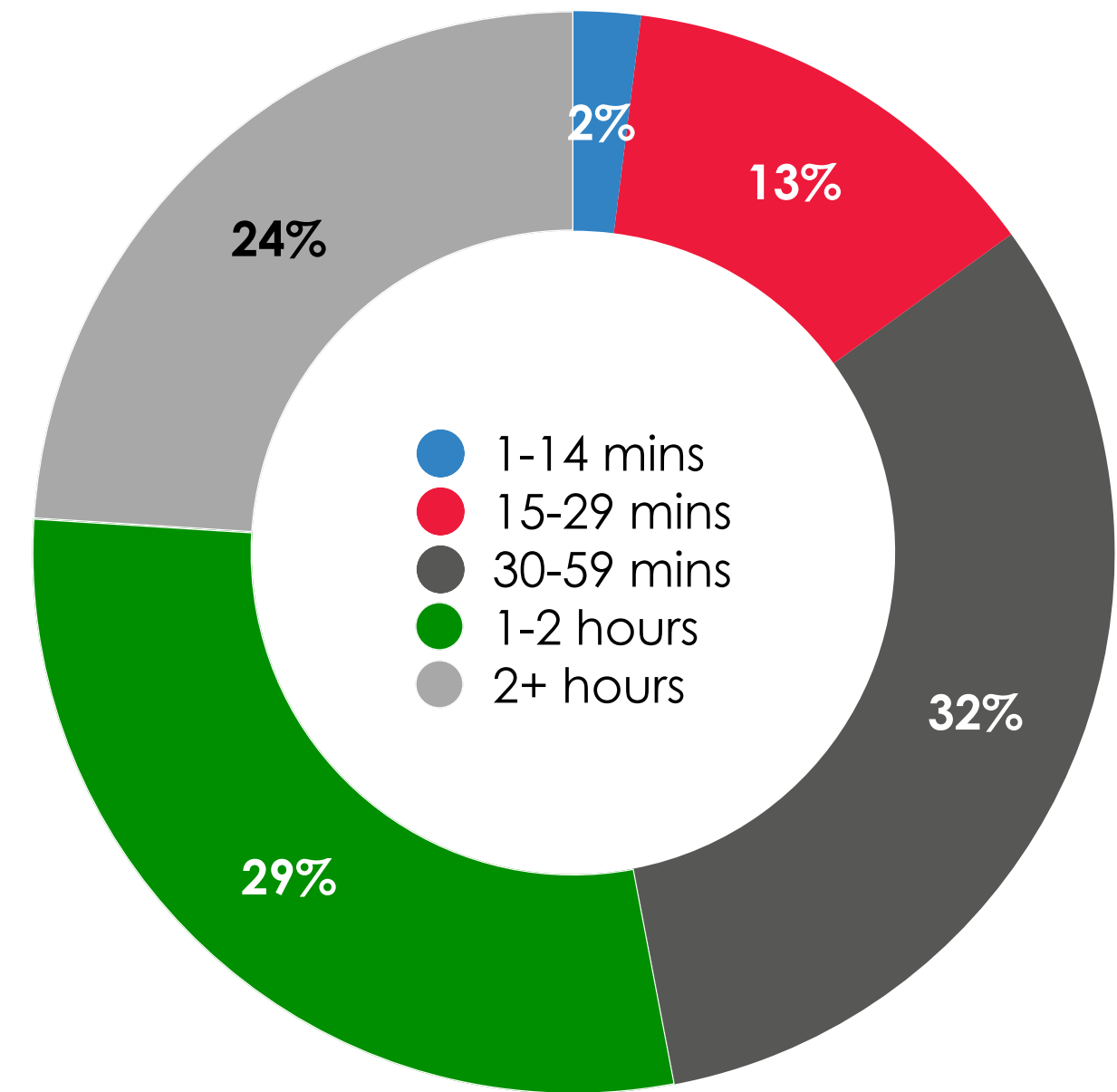
THE MAJORITY OF THE COUNTRY IS NOW LEAVING THE HOUSE AND SPENDING OVER AN HOUR OUT OF THE HOME EACH DAY

Q37. Following the latest government guidance, how often will/do you plan to leave your house on an average day?



Base: All respondents, W8 = 1,003

Q38. Following the latest government guidance, on an average day, how long will/do you plan to spend outside of our house?

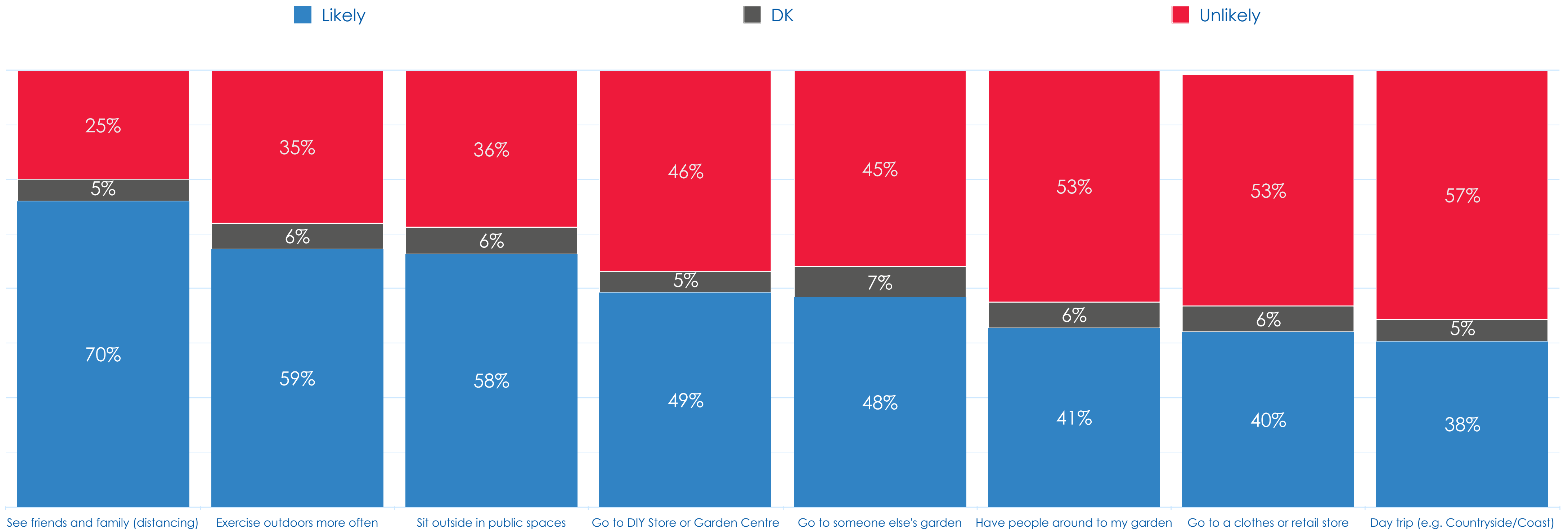


Base: W8 All who will go out = 870

THE FUTURE

95% OF US THINK THAT WE WILL INCREASE THE AMOUNT WE'RE OUT OVER THE NEXT COUPLE OF WEEKS

How likely are you to do the following over the next couple of weeks, now that some restrictions have been lifted?

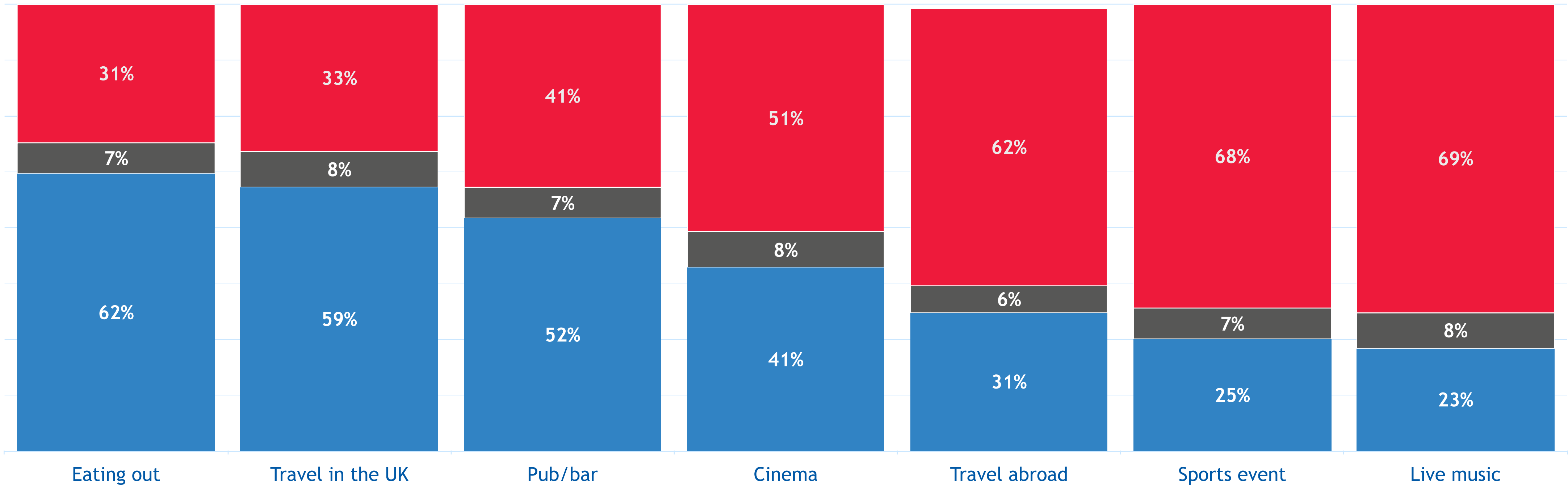


THE FUTURE

LOOKING FURTHER AHEAD, THERE ARE LOTS OF ACTIVITIES THAT APPEAL WHEN RESTRICTIONS ARE LIFTED

Assuming that the Government gives permission, how likely will you be to do the following in July/August?

■ Likely ■ DK ■ Unlikely



SUMMARY

A CHANGE TO COME...

Opening of pubs/pub gardens?

Opening of restaurants?

Reopening of offices?

Easing of restrictions on UK travel?

Easing of restrictions on international travel?



For more information contact
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