BAUER MEDIA COVID-19 REPORT #4

6 WEEKS LATER: THERE'S NO PLACE BUT HOME

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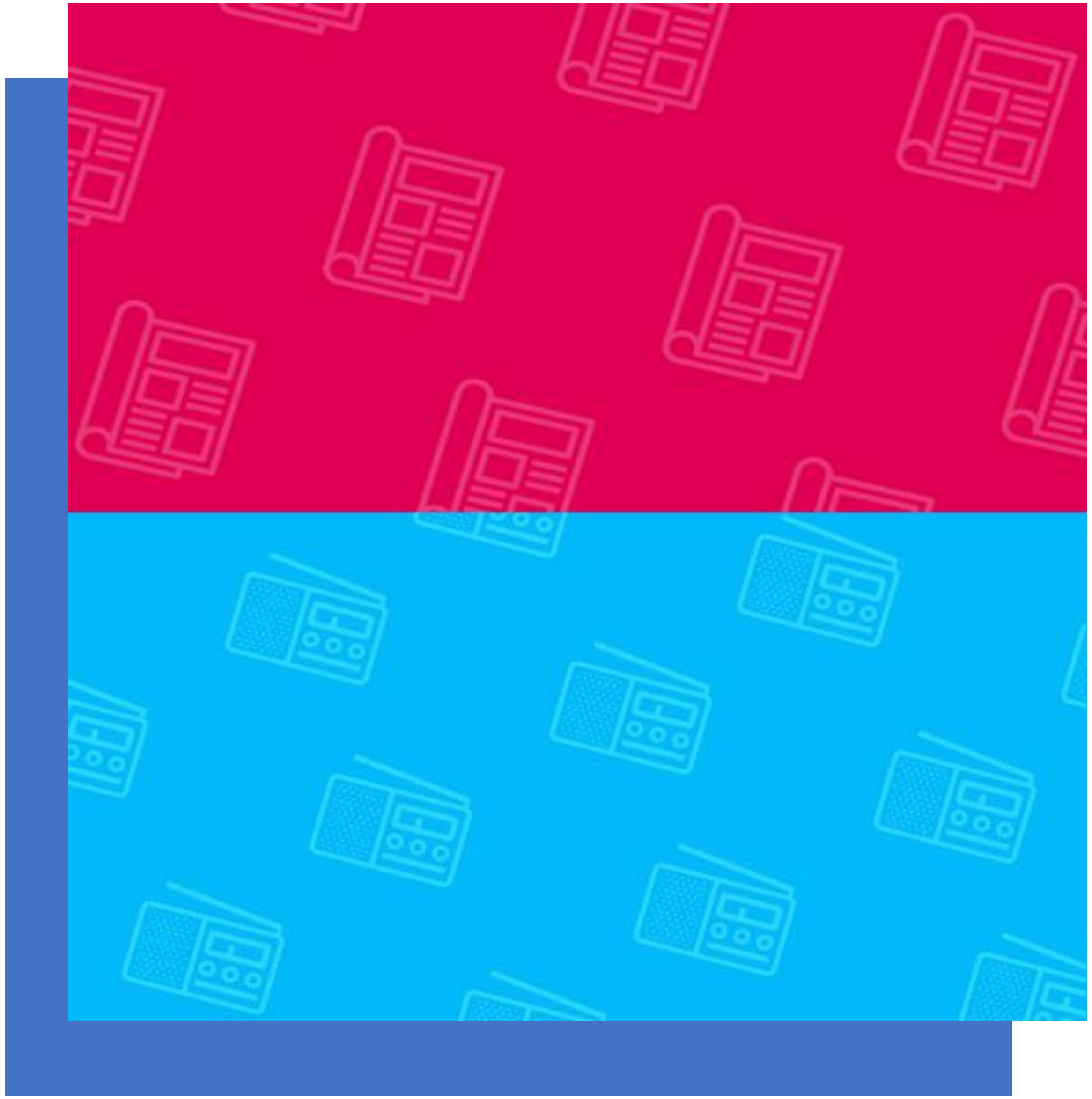
BAUER INSIDERS:
COVID19 INSIGHT #4
w/c 27TH APRIL

WELCOME TO THE LATEST BAUER MEDIA COVID-19 UPDATE
This report provides a detailed look at how the UK is reacting to living in lockdown,xxxx

METHODOLOGY: Data in this report was gathered between 24th-27th April on the Bauer Media Insiders panel. The data is compared to the first wave which was gathered on between 19th-22nd March. The data has been weighted to be nationally representative (weighted on gender, age, social grade & region), with a sample size of 1198.

THE BAUER INSIDERS: c. 5,500 Bauer consumers have opted to become the Bauer Insiders - a community which receive regular surveys which provide invaluable insight into all aspects of their lives. The Bauer Insiders consume a wide range of Bauer Media's brands across digital, radio, print, TV & events. During lockdown we are contacting them bi-weekly to gain timely audience insights reflecting the changing attitudes, behaviour & media consumption of our locked-down audiences.



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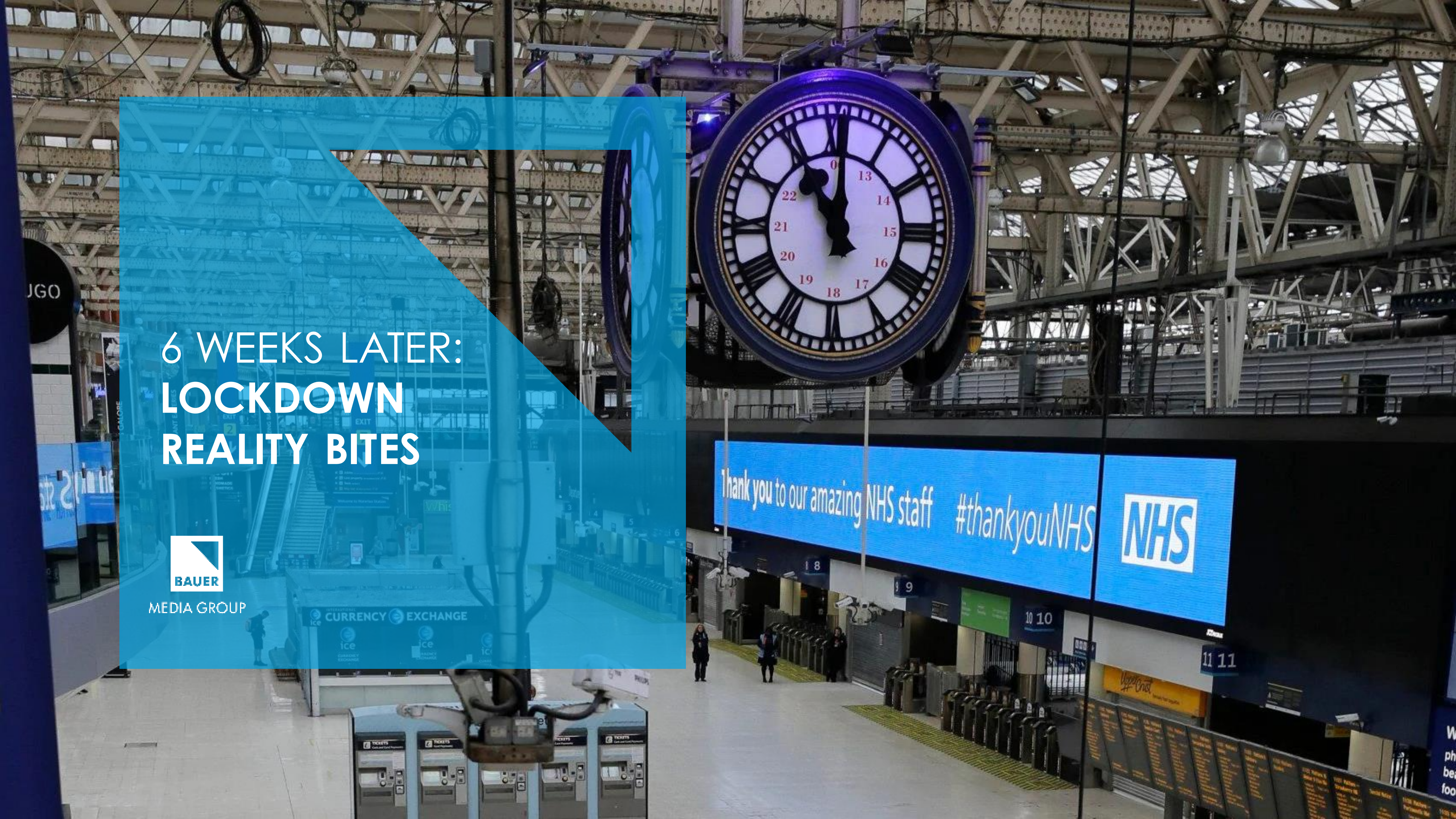

6 WEEKS LATER:
LOCKDOWN REALITY BITES

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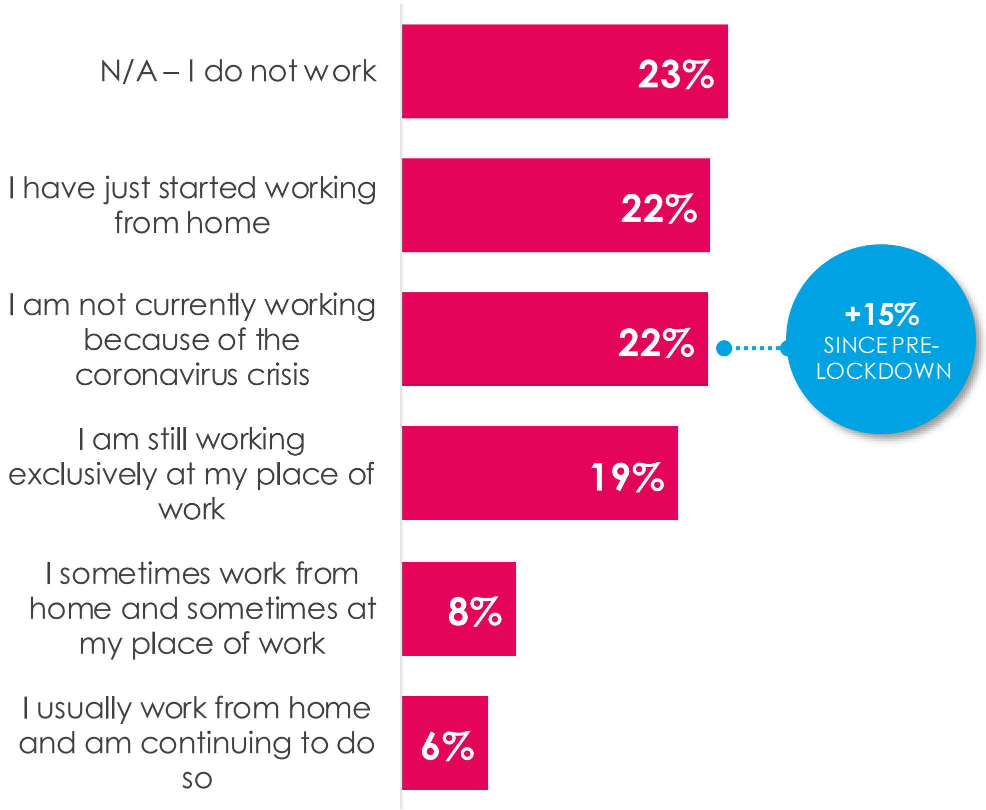
GETTING INTO A NEW ROUTINE IS HARDER THAN PEOPLE INITIALLY THOUGHT BUT OVERALL CONCERNS HAVEN'T GROWN SIGNIFICANTLY

NEW ROUTINES

AT THE START OF LOCKDOWN	6 WEEKS LATER
69% CONFIDENT	59% SATISFACTORY
25% ON THE FENCE	29% ON THE FENCE
7% NOT CONFIDENT	13% UNSATISFACTORY

PEOPLE WERE CONFIDENT AT THE BEGINNING OF LOCKDOWN THAT THEY WOULD BE ABLE TO CREATE NEW ROUTES – 6 WEEKS LATER THEIR NEW ROUTINES ARE LESS SATISFACTORY THAN THEY IMAGINED

NEW WORKING PATTERNS



79% Working predominantly at home or not working at all due to covid-19

SAME CONCERNS

88%

Are **concerned** about coronavirus compared to **85%** pre-lockdown

1 in 3

think the **government's response is poor** compared to **23%** pre-lockdown

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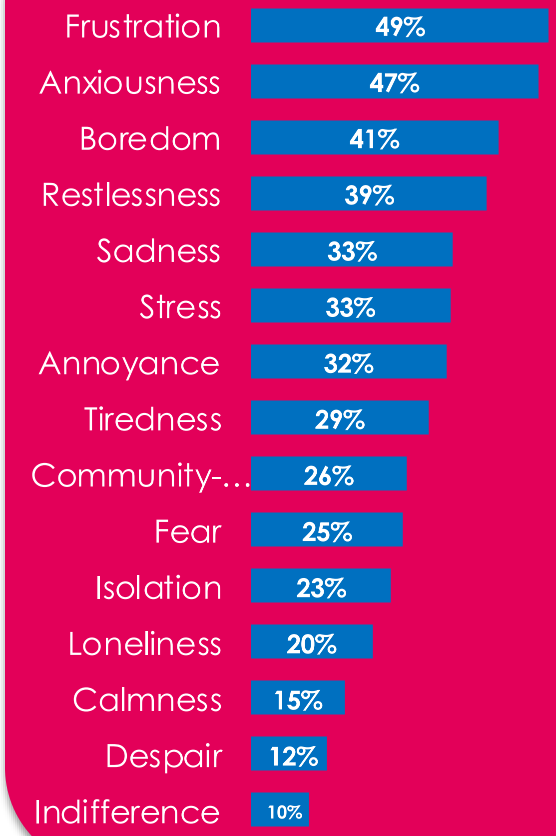
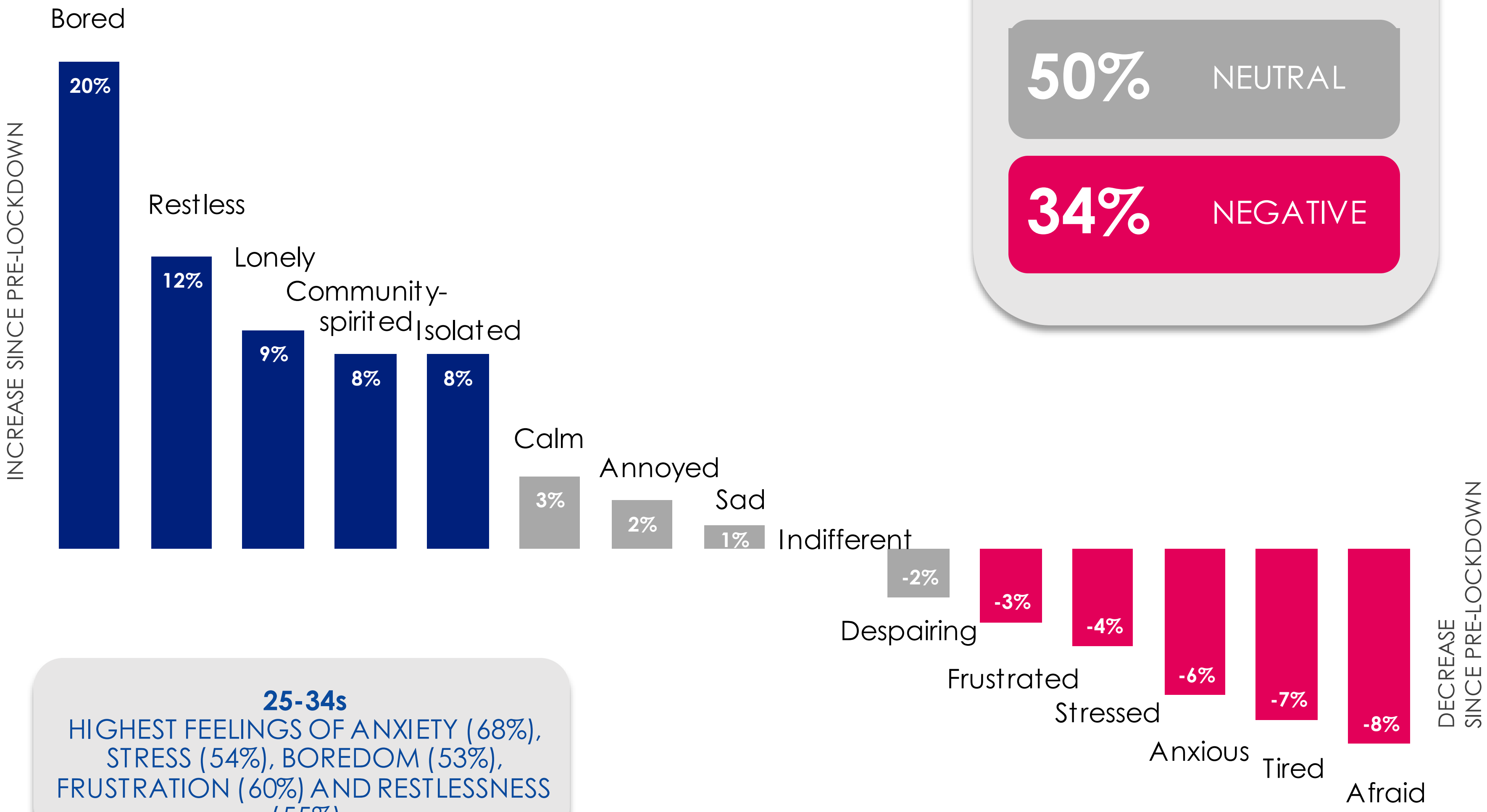
IT'S PROVING TO BE AN EMOTIONAL ROLLERCOASTER

OVERALL PEOPLE APPEAR TO BE LESS TIRED, STRESSED & AFRAID THAN PRE-LOCKDOWN AS THEY ADJUST TO LOCKDOWN LIFE BUT ARE INCREASINGLY BORED & LONELY

FEELINGS ABOUT THE CRISIS



SHIFT IN EMOTIONS SINCE PRE-LOCKDOWN



25-34s
HIGHEST FEELINGS OF ANXIETY (68%), STRESS (54%), BOREDOM (53%), FRUSTRATION (60%) AND RESTLESSNESS (55%)

EMOTIONAL IMPACT OF LOCKDOWN

16% POSITIVE

50% NEUTRAL

34% NEGATIVE

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THE DAILY STRUGGLES OF LOCKDOWN

LOCKDOWN IS TAKING ITS TOLL ON PEOPLE'S MENTAL & PHYSICAL WELLBEING – THE BIGGEST CHALLENGES ARE AROUND UNCERTAINTY ABOUT HOW LONG THIS WILL LAST, LACK OF FREEDOM AND SOCIAL CONTACT

FEELING POWERLESS

89%
not knowing when it will end
32% a major challenge/ almost impossible

82%
lack of freedom/ independence
25% a major challenge/ almost impossible

74%
lack of control/ feeling powerless
18% a major challenge/ almost impossible

LACK OF HUMAN CONTACT

80%
lack of social contact
18% a major challenge/ almost impossible

64%
isolation
18% a major challenge/almost impossible

50%
loneliness
8% a major challenge/almost impossible

IMPACT ON MENTAL HEALTH

71%
stressed/ feeling nervous
18% a major challenge/ almost impossible

64%
anxiety
18% a major challenge/ almost impossible

52%
depression
13% a major challenge/ almost impossible

IMPACT ON PHYSICAL HEALTH

59%
not getting enough exercise
13% a major challenge/ almost impossible

WORK/LIFE IMBALANCE

38%
not being able to switch off from work
7% a major challenge/ almost impossible

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6 WEEKS LATER: **WHAT'S GOING ON INDOORS?**

LOCKDOWN COMPANIONS, HARMONIOUS HOUSEHOLD?

PEOPLE PREDOMINANTLY SHARE THE HOME WITH OTHERS & HALF ARE FINDING THIS HARD. AND IT IS EVEN HARDER FOR THOSE LIVING WITH A PARENT AND FOR PEOPLE WITH CHILDREN UNDER 18 WHO ARE FINDING JUGGLING WORK AND CHILDCARE CHALLENGING

WHO LIVES IN THE LOCKED-DOWN HOUSEHOLD

60%
PARTNER

17%
LIVE ALONE

17%
PARENT

14%
CHILD 0-10

13%
ADULT CHILD

13%
TEENAGE CHILD

FRUSTRATIONS WITH HOUSEHOLD MEMBERS

50%
FINDING IT A CHALLENGE

66%
IF LIVING WITH A PARENT

72%
IF LLVING WITH A CHILDREN UNDER 18

CHILDCARE CHALLENGES

41%
ARE FINDING IT A CHALLENGE TO LEARN NEW PARENTING SKILLS

44%
ARE FINDING IT A CHALLENGE TO BALANCE WORK & CHILDCARE

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KEEPING BUSY, KEEPING POSITIVE, KEEPING BOREDOM AT BAY

OUTDOOR ACTIVITIES

61% WALKING (+7%)

11% RUNNING (+1%)

27% OTHER EXERCISE/SPORT (+0%)

11% BIRD WATCHING (+2%)

HOMES & GARDEN

52% SPRING CLEANING (+1%)

28% DIY (+2%)

48% GARDENING (+14%)

23% HOME IMPROVEMENT (-7%)

ENTERTAINMENT

63% READ BOOKS (-3%)

34% SUBSCRIBE TO A TV STREAMING SERVICE (+10%)

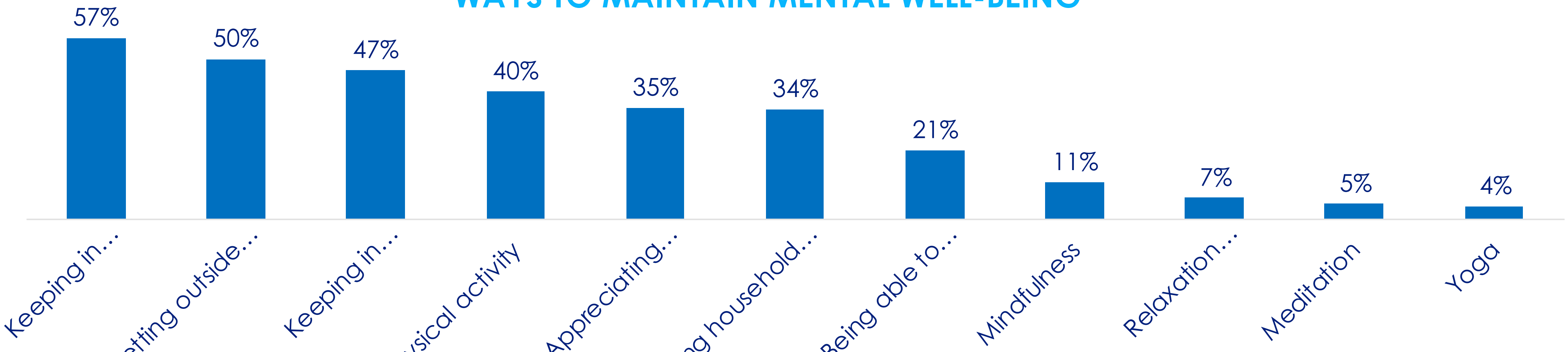
38% READ MAGAZINES (+4%)

9% RENT FILMS TO WATCH ON TV (-17%)

5% DOWNLOAD A DIGITAL MAGAZINE

39% ENTERING COMPETITIONS

WAYS TO MAINTAIN MENTAL WELL-BEING



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TIME TO ESTABLISH NEW HABITS?

NEARLY 60% CLAIM NOT TO HAVE DONE ANYTHING NEW SINCE LOCKDOWN STARTED

58%
NO NEW HABITS

42%
NEW BEHAVIOURS

19%	18%	10%	13%
GOOD HABITS	TRIED SOMETHING NEW	NEW SKILLS	BAD HABITS

82% INTEND TO CARRY ON WITH NEW BEHAVIOURS AFTER LOCKDOWN

NEW LOCKDOWN BEHAVIOURS

"DRINKING MORE ALCOHOL THAN NORMAL"

"COOKING MORE ADVENTUROUSLY"

"LEARNING A NEW LANGUAGE AND COMPUTER SKILLS"

"BAKING AND COOKING SKILLS"

"RUNNING OUTSIDE MORE"

"DIY SKILLS, FIXING MORE THINGS MYSELF"

"GOING WALKING EVERYDAY"

"EATING TOO MUCH"

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IMPACT OF LOCKDOWN ON THE **CONSUMER PURCHASE JOURNEY**

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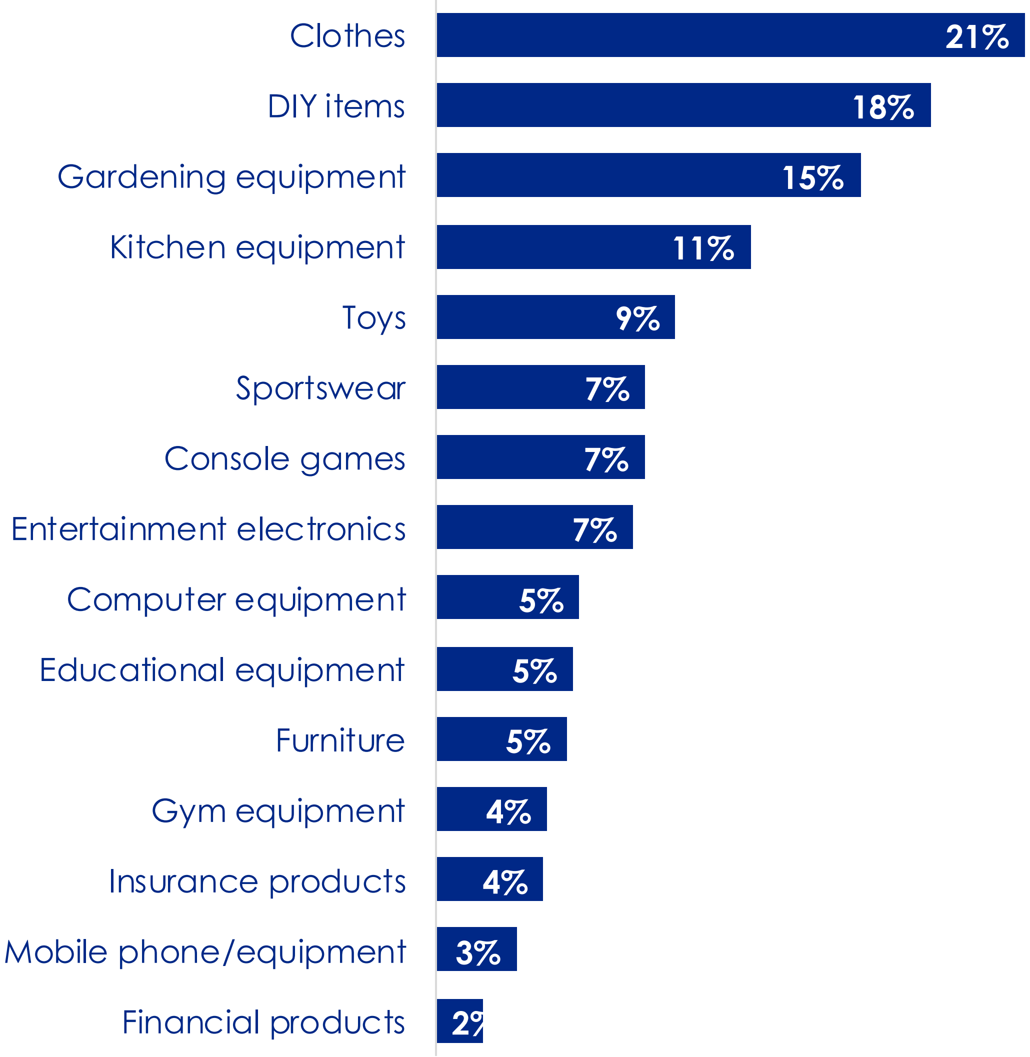
CHANGING BUYING BEHAVIOUR IN LOCKDOWN

DESPITE BEING AT HOME PREDOMINANTLY, PEOPLE ARE STILL BUYING CLOTHES. MOST OTHER PURCHASES ARE CLEARLY LINKED TO BEING ON LOCKDOWN



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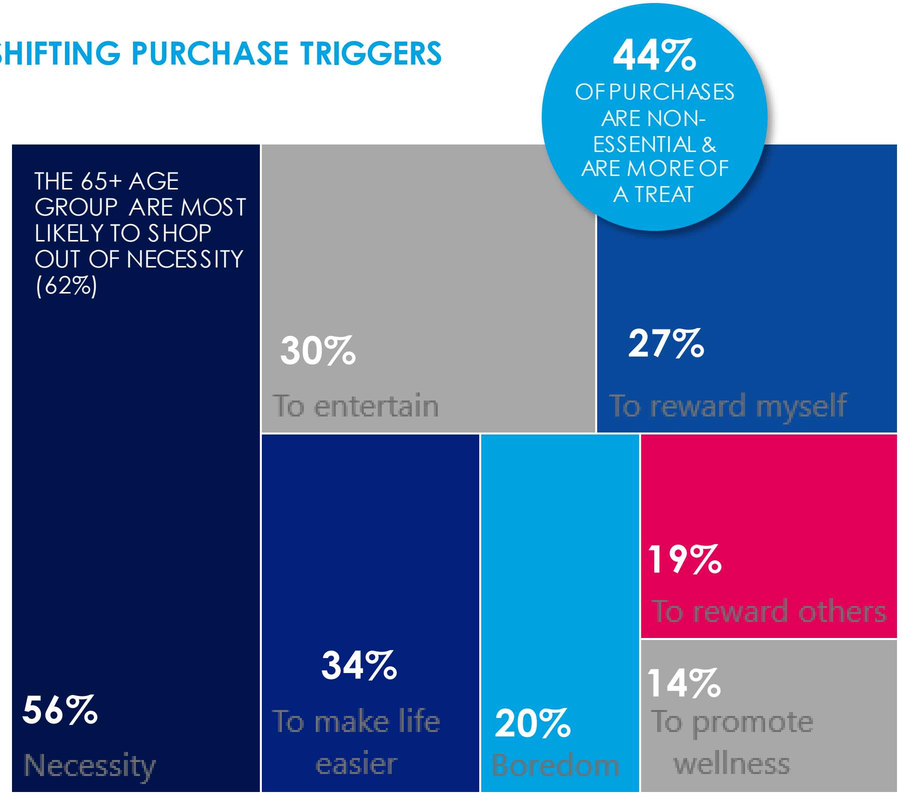
A NEW CONSUMER BUYING JOURNEY?

SHIFTING PURCHASE TRIGGERS



LONGER RESEARCH PHASE

32%

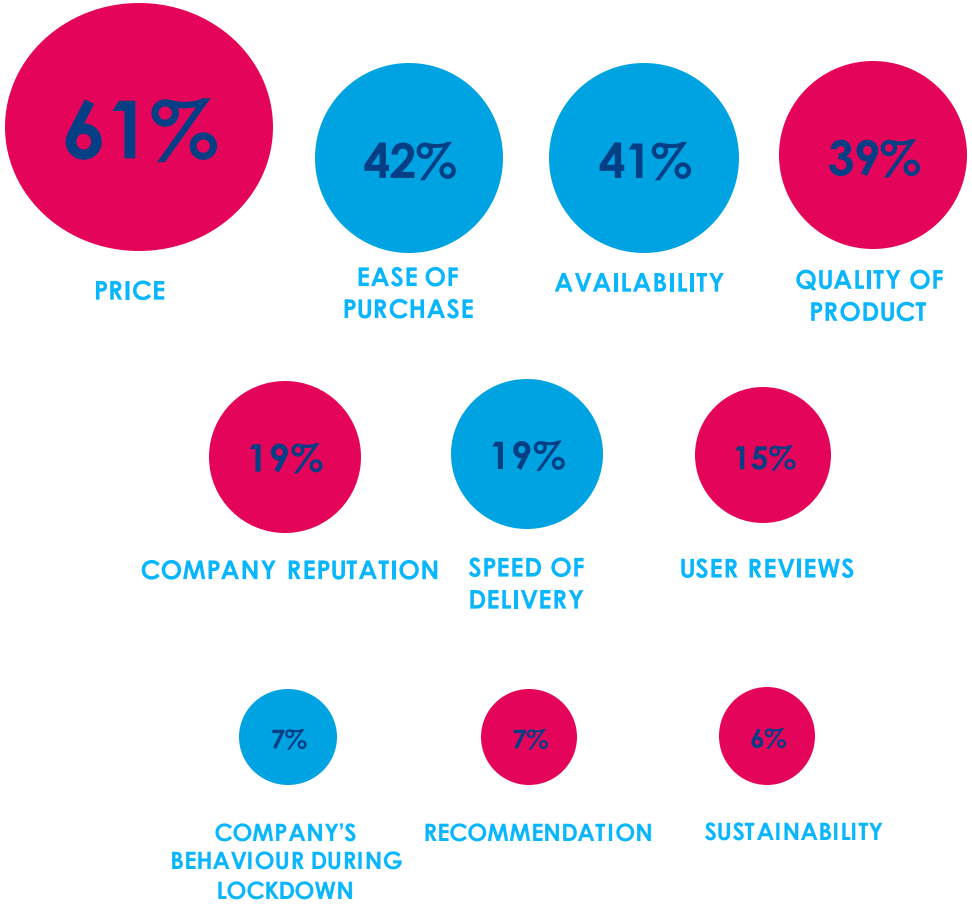
TAKE LONGER TO RESEARCH WHAT TO BUY THAN THEY WOULD HAVE DONE PRIOR TO LOCKDOWN

SPENDING LONGER ON SPECIFIC ITEMS...

63% - EDUCATIONAL EQUIPMENT
59% - KITCHEN EQUIPMENT
52% - DIY ITEMS
52% - ENTERTAINMENT ELECTRONICS

NEW CONSIDERATIONS

ALONGSIDE USUAL REASONS FOR CONSIDERATION SUCH AS **PRICE & QUALITY,** LOCKDOWN HAS MADE OTHER CONSIDERATIONS SUCH AS **EASE OF PURCHASE, AVAILABILITY AND SPEED OF DELIVERY** MORE IMPORTANT.



KEY CATEGORY CONSIDERATIONS

PRICE

MOBILE PHONE/ EQUIPMENT (76%)

SPORTSWEAR (75%)

CONSOLE GAMES (71%)

EASE OF PURCHASE

INSURANCE PRODUCTS (59%)

ENTERTAINMENT ELECTRONICS (54%)

FURNITURE (54%)

AVAILABILITY

GARDENING ITEMS (63%)

DIY ITEMS (61%)

AFTERTHOUGHTS: WHEN THE CRISIS IS OVER

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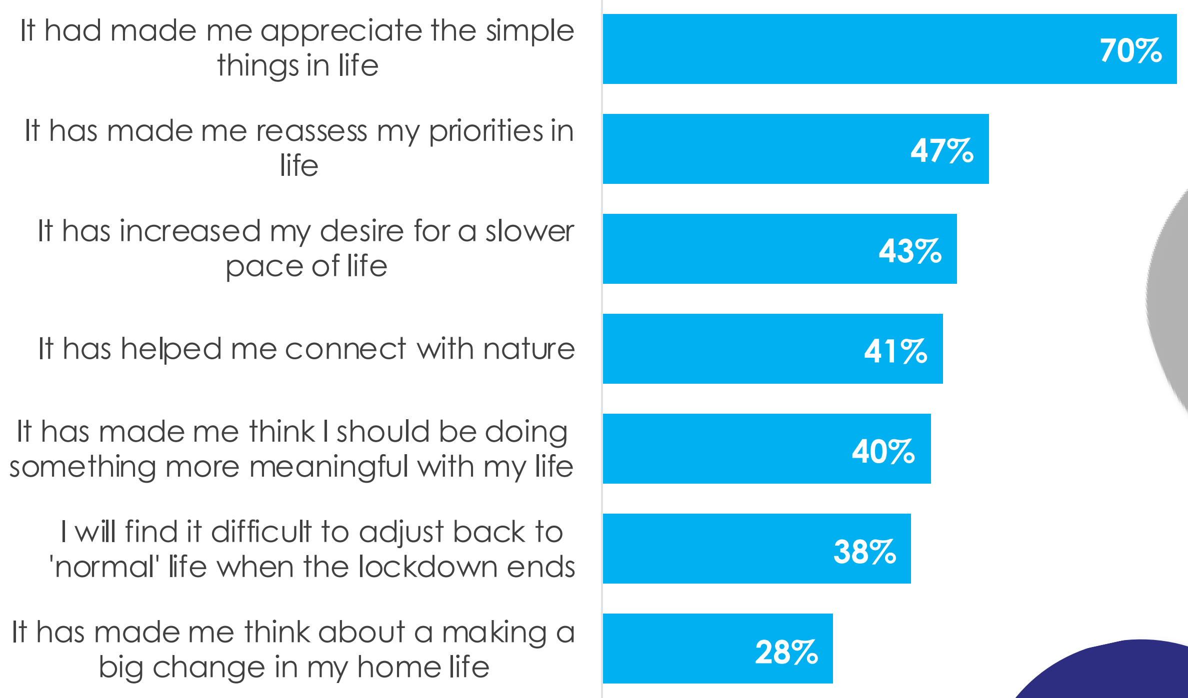
LOCKDOWN HAS LED TO A REASSESSMENT OF PRIORITIES & AN APPRECIATION OF THE SIMPLE THINGS

A SIMPLER LIFE, NEW PRIORITIES



35-44s

MORE LIKELY TO BE THINKING ABOUT THEIR PRIORITIES (59%), DOING SOMETHING MORE MEANINGFUL (56%) AND DESIRING A SLOWER PACE (50%)

MOST LOOKING FORWARD TO

SEEING FAMILY & FRIENDS

"FEELING LESS ANXIOUS ESPECIALLY WHEN OUT. SOCIALISING WITH FRIENDS AND FAMILY"

"BEING ABLE TO SEE FAMILY, WALK AROUND THE SHOPS AND LOOKING FOR NEW JOB"

"HUGGING FRIENDS AND FAMILY"

GOING OUT & SPENDING

"BEING ABLE TO GO OUT SHOPPING, EATING OUT"

"EATING OUT AT A RESTAURANT AND GOING CLOTHES SHOPPING WITHOUT HAVING TO QUEUE"

"BEING ABLE TO SHOP NORMALLY"

"GOING FOR A DRINK IN LOCAL PUB"

"GETTING A DECENT HAIRCUT"

GOING TO EVENTS

"ENJOYING LIVE EVENTS - THEATRE, MUSIC GALLERIES, EATING OUT"

"GOING TO A GIG OR FESTIVAL"

GOING ON HOLIDAY

"HAVING A SHORT BREAK SOMEWHERE"

"GOING ON HOLIDAY"

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IMPACT ON ATTITUDES TO WORK

A SHIFT IN WORKING PATTERNS HAS LED TO A REVIEW OF NORMAL WORKING LIVES

LESSONS LEARNED FOR FUTURE WORK

FLEXIBILITY

"FLEXIBILITY IS KEY. STEPPING UP WITH NEW IDEAS & ALTERNATIVE WORKING METHODS"

"HOW TO WORK MORE FLEXIBLY TO TRY AND ADAPT TO AN EVER CHANGING SITUATION"

"SIMPLER WAYS OF WORKING, THAT I DON'T NEED TO USE SO MUCH PAPER, THAT WORKING FROM HOME MORE OFTEN WOULD BE A GOOD WAY TO BALANCE HOME & WORK LIFE"

TIME TO QUIT

"I NEED TO SWITCH CAREERS"

"I WOULD LIKE A CHANGE"

"I WANT TO DO SOMETHING MORE WORTHWHILE"

"THAT I DON'T GET ANY SUPPORT FROM MY CURRENT EMPLOYERS AND THAT I NEED TO LEAVE THIS JOB FOR MY OWN WELL BEING"

WORKING FROM HOME

"THE AVAILABILITY TO WORK FROM HOME"

"I CAN WORK FROM HOME EASILY"

"CAN WORK MORE FROM HOME"

"IT IS A GOOD IDEA TO WORK FROM HOME"

MEETINGS NEED TO CHANGE

"THE LACK OF NEED FOR SO MANY FACE TO FACE MEETINGS"

"NO NEED FOR FACE TO FACE MEETINGS IN A ROOM"

"REMOTE MEETINGS WASTE LESS TIME AS IT'S EASIER TO MULTI-TASK"

"MEETINGS CAN BE SUCCESSFULLY HELD REMOTELY"

REASSESSING WORK

27% "it has made me reassess my work/life balance"

27% "it has made me want to change things about my current job"

26% "it has made me want to work from home more after the lockdown ends"

24% "it has made me think about making a big change in my working life"

MEN ARE MOST LIKELY TO BE REASSESSING WORK/LIFE BALANCE (31%) AND WANTING TO CHANGE THINGS ABOUT THEIR JOB (30%)

35-44s ARE MOST LIKELY TO BE REASSESSING WORK/LIFE BALANCE (40%) AND WANTING TO MAKE A BIG CHANGE IN THEIR WORKING LIFE (33%)

A CAUTIOUS RETURN TO NORMAL

WHEN ASKED ABOUT HOW CAUTIOUS THEY ARE ABOUT CERTAIN ACTIVITIES AFTER LOCKDOWN, TRAVELLING ON PUBLIC TRANSPORT, HOLIDAYING OUTSIDE EUROPE AND ATTENDING LARGE SPORTING EVENTS ARE VIEWED WITH THE MOST CAUTION OVERALL WITH HOLIDAYING IN THE UK AND SHOPPING LOCALLY BEING VIEWED AS THE LEAST RISKY ACTIVITIES POST-LOCKDOWN

THE CAUTION SPECTRUM

MOST CAUTIOUS → LEAST CAUTIOUS

Travelling on public transport	66%
Going on holiday outside Europe	66%
Attending large sports events	66%
Going on holiday in Europe	65%
Going to festivals	64%
Going to concerts	62%
Shopping in shopping centres	62%
Going to the pub	61%
Going to the theatre	60%
Going to the cinema	60%
Eating out in restaurants	58%
Shopping in retail parks	56%
High street shopping	53%
Going on weekends away	51%
Going on holiday in the UK	48%
Shopping locally	42%

SHOPPING IS SEEN AS THE LEAST RISKY BUSINESS

64% LIVE EVENTS

66% large sports events
64% concerts
62% festivals

60% GOING OUT

61% the pub
60% the cinema
60% the theatre
58% restaurants

59% TRAVELLING

66% holiday outside Europe
66% holiday in Europe
65% public transport
51% weekends away
48% holiday in the UK

53% SHOPPING

62% shopping centres
56% retail parks
42% locally

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THE OUTLOOK

THE UNKNOWN HAS LED TO MIXED FEELINGS TOWARDS THE FUTURE BUT MORE PEOPLE ARE OPTIMISTIC THAN PESSIMISTIC

38% OPTIMISTIC

+3% VS PRE LOCKDOWN

32% NEUTRAL

29% PESSIMISTIC

+4% VS PRE LOCKDOWN

BAUER MEDIA COVID-19 REPORT #4 **6 WEEKS LATER: KEY THEMES**

THE WAITING GAME

People are not seeing their locked-down days as anywhere near normal but just something to be accepted begrudgingly until they are allowed to return to everyday life.

There is not much more concern around coronavirus than there was just before lockdown on 23rd March although there is a decline in confidence in the government's handling of the crisis.

Before lockdown people were confident that they would be able to build new routines but now the novelty has definitely worn off and fewer think that their new routines are satisfactory.

Many people are using the opportunity to learn new skills & try new things that they intend to carry on after lockdown but the majority say that they are not doing anything differently. Many are just waiting it out.

WE ARE SOCIAL ANIMALS

There are indications that lockdown is having major effect on people's mood and, although overall people are saying that they are less tired, stressed & afraid of the situation 6 weeks in, as they adjust to lockdown life, they are increasingly feeling powerless, bored & lonely.

There is no doubt that lockdown is taking its toll on people's mental & physical wellbeing – the biggest challenges are around uncertainty about how long this will last, lack of freedom and lack of social contact

PLAYING NICELY

Most people appear to be getting on fine with their fellow locked-down housemates although there are signs that relationships are being tested especially for those living with parents or young children with the added challenges of home-schooling alongside work commitments.

People are findings ways of filling the days with exercise, DIY and various methods of entertainment and are ensuring that they look after their mental health by keeping in contact with friends & family, getting out of the house and a range of relaxation activities.

EMERGING BUYING BEHAVIOURS

When it comes to shopping for items other than food, many people are buying non-essential products to keep themselves & their locked-down companions entertained and rewarded and to ease their way through these difficult times. This opens up opportunities to advertisers to appeal to these needs of time-filling, treats & rewards.

People have the luxury of time, taking longer to make decisions on purchases and spending longer on researching prior to buying. This offers opportunities for advertisers to target people more frequently during this extended research phase.

Price, quality & value are still important during lockdown but customer service and company values are also key consideration drivers as we are seeing that how companies respond to the crisis is having an impact on purchase decisions.

THE UNLOCKED WORLD

Lockdown has given people time to reassess and re-evaluate what is important to them and that this will have implications for the future of both their work & home life.

They are looking forward to getting back to the people and things that they love when they are finally allowed out of their homes, whether that is hugging their loved ones, not having to queue to shop, having a holiday or a haircut.

However, they are viewing getting back to their favourite activities with some caution – it seems that, after having to stay at home, staying close to home to shop locally or holiday in the UK - are the next cautious steps that people are prepared to make.

More people are optimistic than pessimistic about the future, they are just eager to know when they will get their freedom back.

APPENDICES: **PURCHASING BY CATEGORY DURING LOCKDOWN**

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CLOTHING
PURCHASE CONSIDERATIONS

41%
WHO BOUGHT CLOTHES ARE SPENDING LONGER RESEARCHING

13%
INTENDED TO BUY PRE LOCKDOWN

21%
HAVE BOUGHT DURING LOCKDOWN

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HOMES & GARDENS
PURCHASE CONSIDERATIONS

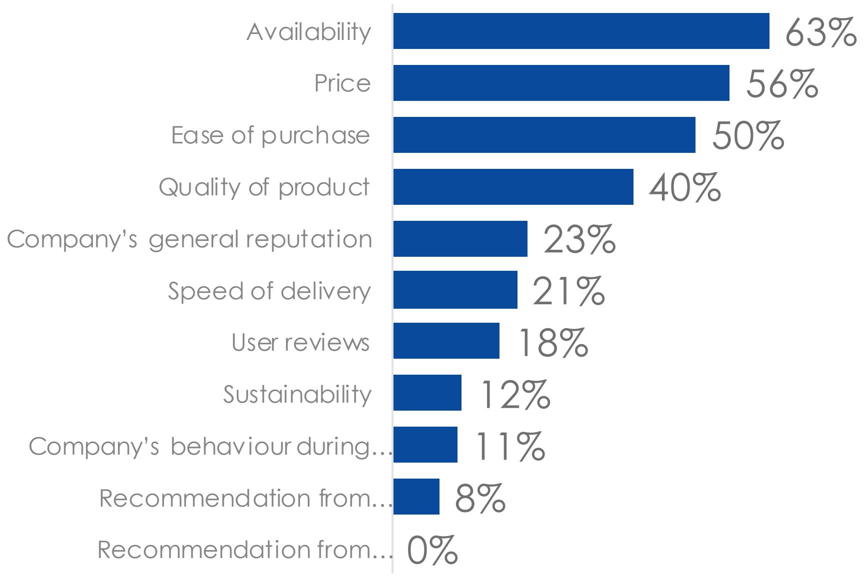
DIY ITEMS

52%
WHO BOUGHT DIY ITEMS ARE SPENDING LONGER RESEARCHING

11%
INTENDED TO BUY PRE LOCKDOWN

18%
HAVE BOUGHT DURING LOCKDOWN

GARDENING EQUIPMENT



36%
WHO BOUGHT GARDENING EQUIPMENT ARE SPENDING LONGER RESEARCHING

12%
INTENDED TO BUY PRE LOCKDOWN

15%
HAVE BOUGHT DURING LOCKDOWN

PURCHASE CONSIDERATIONS
CHILDREN'S PRODUCTS

TOYS

EDUCATIONAL EQUIPMENT

31%
WHO BOUGHT TOYS ARE SPENDING LONGER RESEARCHING

9%
HAVE BOUGHT DURING LOCKDOWN

63%
WHO BOUGHT EDUCATIONAL EQUIPMENT ARE SPENDING LONGER RESEARCHING

5%
HAVE BOUGHT DURING LOCKDOWN

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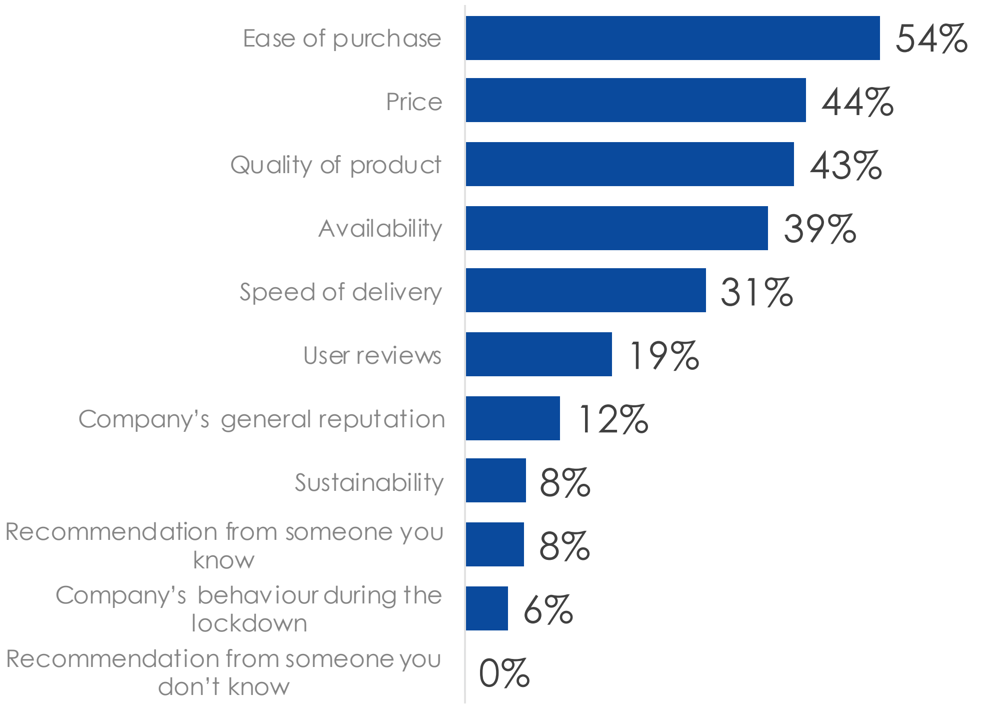
PURCHASE CONSIDERATIONS
ENTERTAINMENT & GAMING PRODUCTS

ENTERTAINMENT ELECTRONICS



CONSOLE GAMES

52%
WHO BOUGHT ENTERTAINMENT ELECTRONICS ARE SPENDING LONGER RESEARCHING

7%
HAVE BOUGHT DURING LOCKDOWN

27%
WHO BOUGHT CONSOLE GAMES ARE SPENDING LONGER RESEARCHING

7%
HAVE BOUGHT DURING LOCKDOWN

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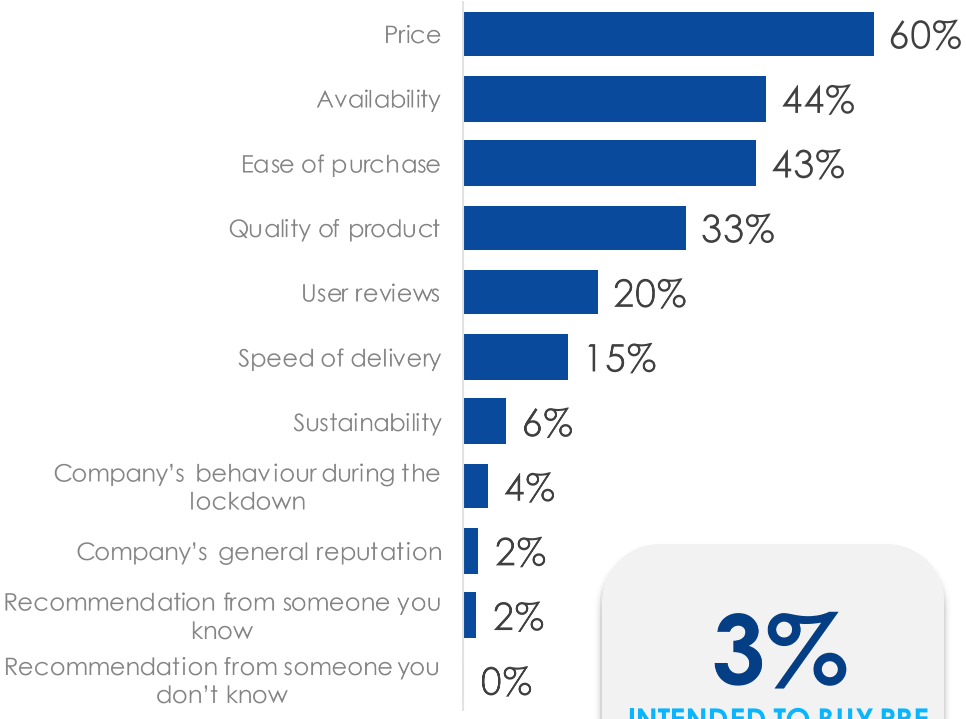
PURCHASE CONSIDERATIONS
HOMEWARE

FURNITURE

47%
WHO BOUGHT FURNITURE ARE SPENDING LONGER RESEARCHING

5%
HAVE BOUGHT DURING LOCKDOWN

KITCHEN EQUIPMENT



59%
WHO BOUGHT KITCHEN EQUIPMENT ARE SPENDING LONGER RESEARCHING

3%
INTENDED TO BUY PRE LOCKDOWN

11%
HAVE BOUGHT DURING LOCKDOWN

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PURCHASE CONSIDERATIONS
SPORTS & EXERCISE

GYM EQUIPMENT

47% WHO BOUGHT GYM EQUIPMENT ARE SPENDING LONGER RESEARCHING

4% HAVE BOUGHT DURING LOCKDOWN

SPORTSWEAR

49% WHO BOUGHT SPORTSWEAR ARE SPENDING LONGER RESEARCHING

7% HAVE BOUGHT DURING LOCKDOWN

PURCHASE CONSIDERATIONS
COMPUTER EQUIPMENT

4%
INTENDED TO BUY PRE LOCKDOWN

5%
HAVE BOUGHT DURING LOCKDOWN

45%
WHO BOUGHT COMPUTER EQUIPMENT ARE SPENDING LONGER RESEARCHING

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PURCHASE CONSIDERATIONS
MOBILE PHONE / EQUIPMENT

31%
WHO BOUGHT MOBILE PHONE/ EQUIPMENT ARE SPENDING LONGER RESEARCHING

3%
HAVE BOUGHT DURING LOCKDOWN

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PURCHASE CONSIDERATIONS
FINANCE & INSURANCE

FINANCIAL PRODUCTS

39%
WHO BOUGHT FINANCIAL PRODUCTS ARE SPENDING LONGER RESEARCHING

2%
HAVE BOUGHT DURING LOCKDOWN

INSURANCE PRODUCTS

28%
WHO BOUGHT INSURANCE PRODUCTS ARE SPENDING LONGER RESEARCHING

5%
INTENDED TO BUY PRE LOCKDOWN

4%
HAVE BOUGHT DURING LOCKDOWN

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