

KANTAR

Covid-19 Barometer

1st wave

Country Report - Ireland

Brand implications and consumer behaviour
evolution

27th March 2020



Research Methodology

Target group



Representative sample of all adults aged 18+ in the Republic of Ireland

Sample size



n=500

Fieldwork



March 17th to 22nd 2020

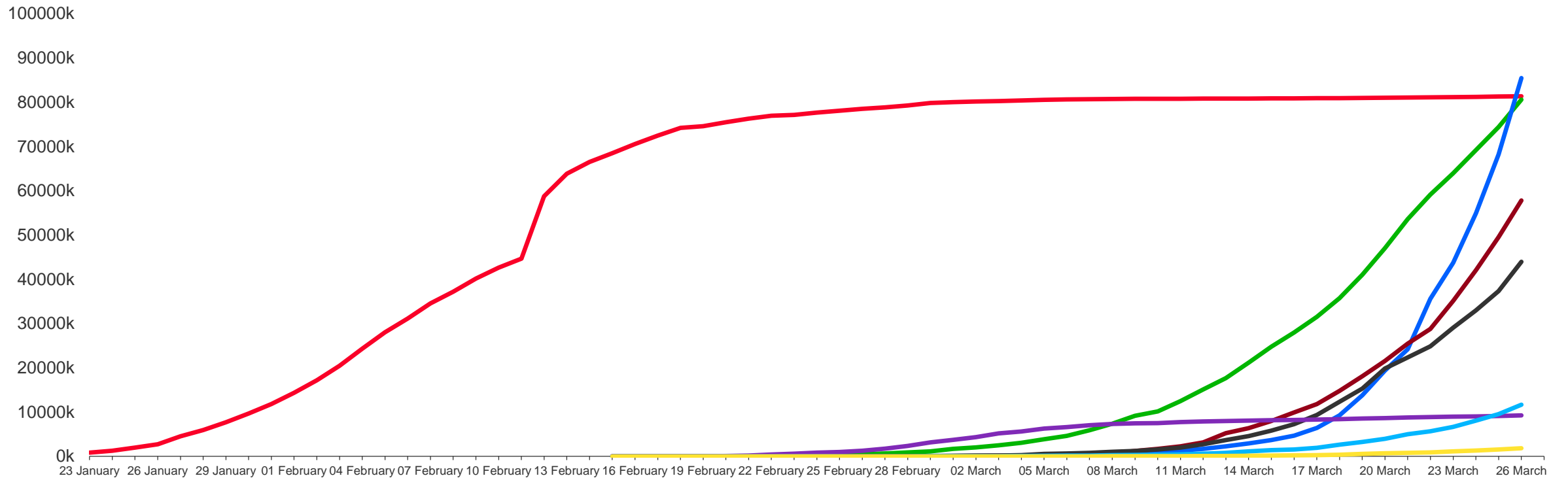
Data collection



Questions were included on the Kantar online omnibus

Reported coronavirus cases to date across a specific number of markets

China Italy USA Spain Germany South Korea UK Ireland

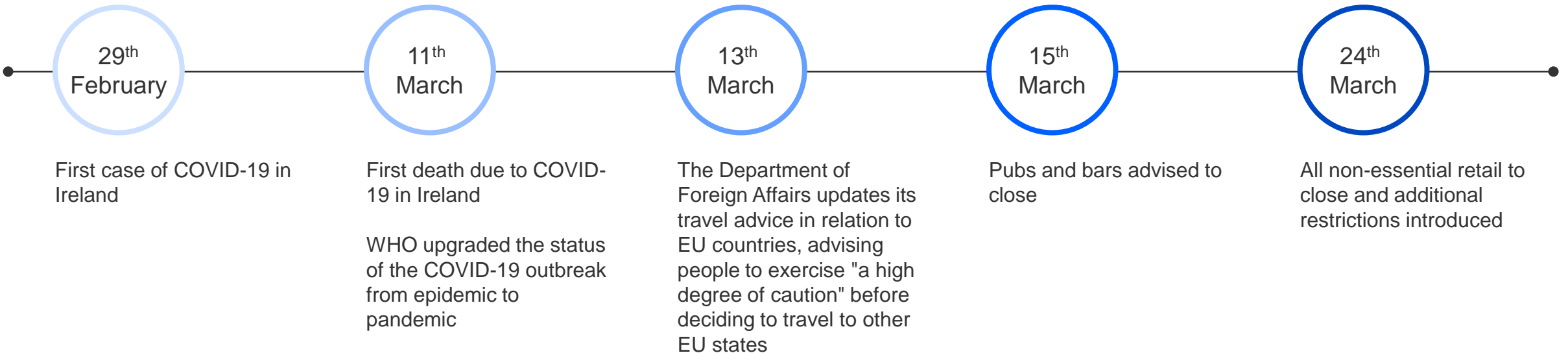


Coronavirus timeline in Ireland



Summary

- A pneumonia of unknown cause detected in Wuhan, China was first reported to the WHO Country Office in China on 31st December 2019
- The outbreak was declared a Public Health Emergency of International Concern on 30th January 2020.
- The international community has asked for US\$675 million to help protect states with weaker health systems as part of its Strategic Preparedness and Response Plan
- On 11th February 2020, WHO announced a name for the new coronavirus disease: COVID-19.



A summary: the Irish show a high level of concern about COVID-19 and the associated impact on day-to-day life, though changes in expectations towards brands and consumption behaviour is still limited



The Irish are very concerned and seeing an impact on daily life...

6 in 10 Irish consumers state that the current situation concerns them hugely, a large portion also states that the situation is impacting their day-to-day life

Looking at an international context, the hugely concerned group in Ireland is one of the largest experienced, closely behind China and well ahead of Italy

Similar to other markets, the Irish are mostly concerned with, at this point, being prepared and well informed and are searching for information on diagnosis and prevention

...but they do not yet expect major changes in the way brands act

Public opinion is that brands and advertising should not exploit the situation as it is, but instead brands should help and comfort Irish consumers and lead by example

Brands should put themselves in the consumer's position, be sincere and be themselves, in line with existing brand values

Nevertheless, public opinion is that companies should first and foremost be mindful of their role as an employer, rather than their role in the wider community and towards consumers

...and they mostly continue consuming and shopping as usual across channels

Compared to last month, the majority of those who shop through e-commerce websites continue as usual, while shopping across offline channels has decreased, suggesting a decline in visit frequency for bricks and mortar stores

Compared to other European markets, at this point, Irish consumers expect a substantial increase in terms of their online shopping behavior in the near future

Media consumption and social media consumption in general are increasing due to limitation on out of home activities – with big wins for TV and online

In this report we will dive into three topics:



1. How are we feeling?

- Level of concern and impact on day-to-day lives
- Level of impact on financial planning and stocking up on items
- What information about coronavirus are the Irish searching for
- What feeling is dominant at the moment
- What's happening on social media

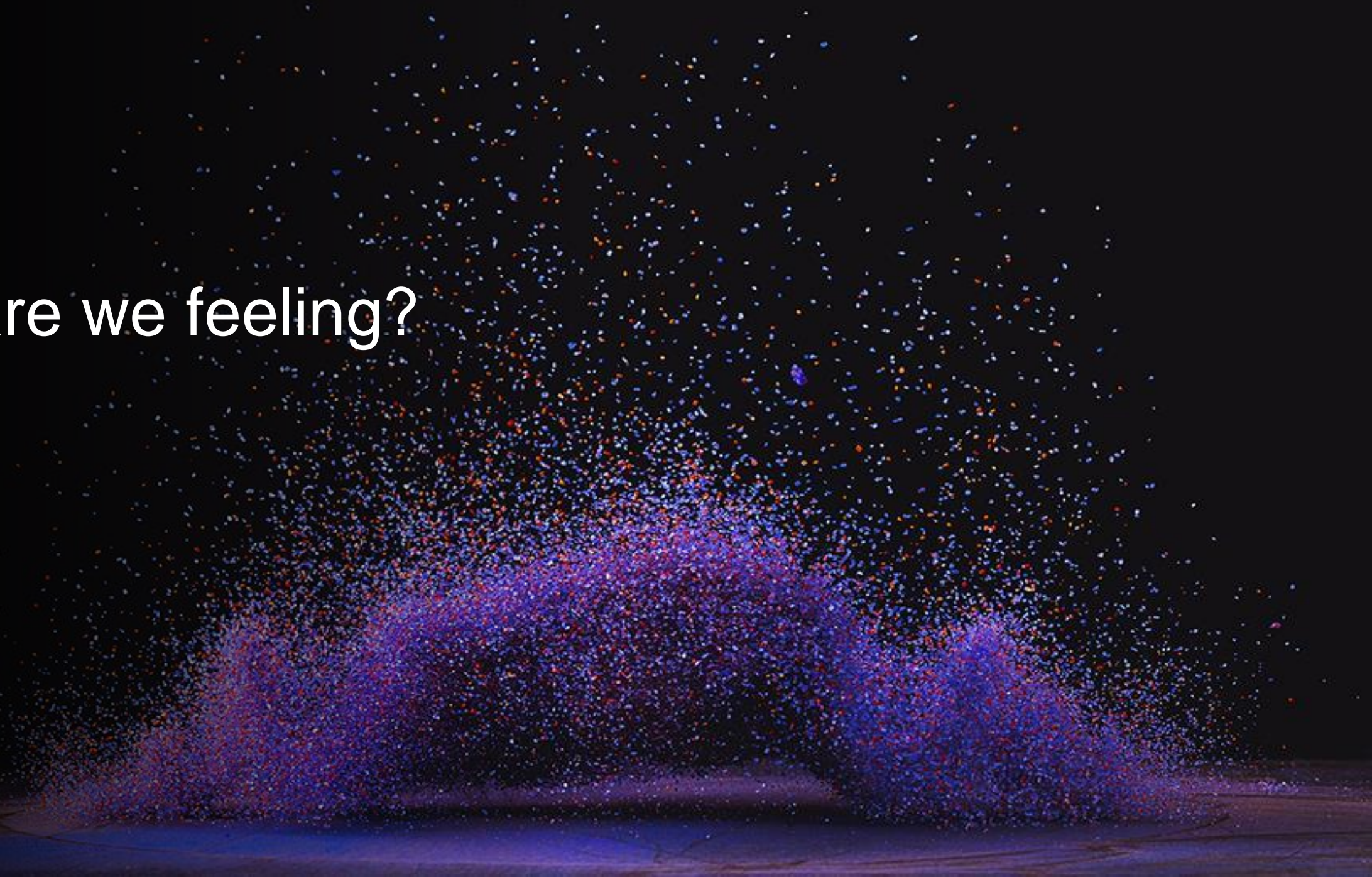
2. What are the implications for brand management?

- Brands should not lose sight of the long term
- Challenging times require a disciplined approach
- Brands must develop a strategy that is in line with the emotive positioning
- Be practical and realistic and help consumers in their everyday life
- Good Customer Experience starts with good Employee Experience

3. How are we consuming?

- Some consumers continue to shop as usual across channels, although bricks and mortar stores are beginning to show signs of reduced footfall
- In terms of media consumption, consumption in general is increasing, with TV and internet being the biggest winners
- Official bodies and national media channels are by far the most important source for trustful COVID-19 information

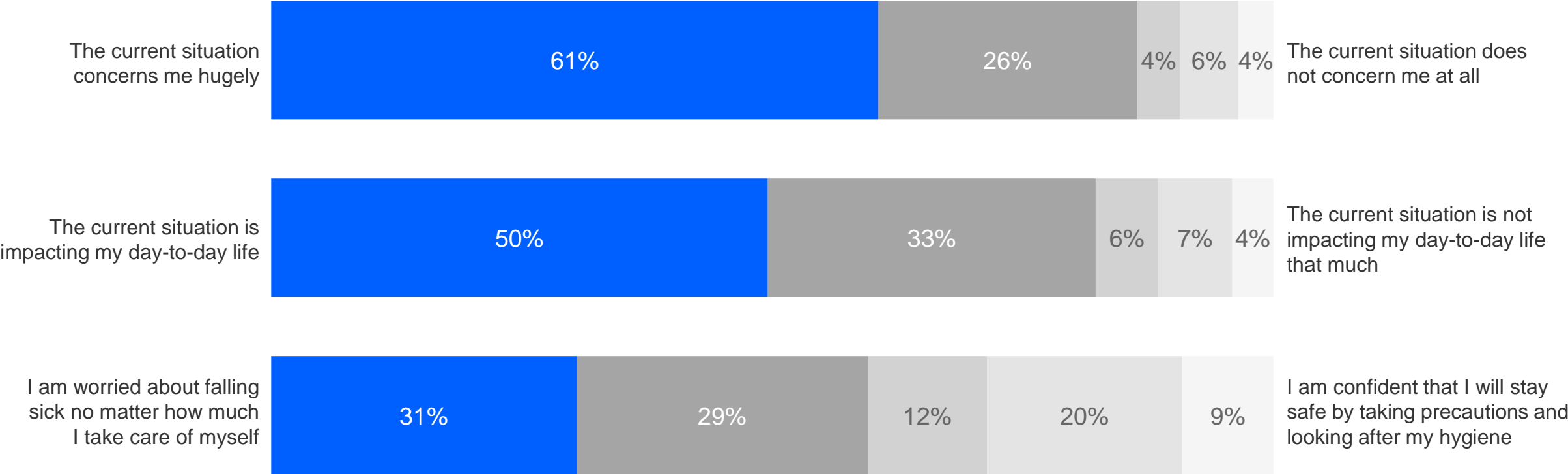
How are we feeling?



6 in 10 Irish are hugely concerned about coronavirus with 1 in 2 stating their daily lives are very much impacted. There is a large degree of worry about falling ill, with 3 in 10 fearing they will be infected with coronavirus regardless of how much they take care of themselves

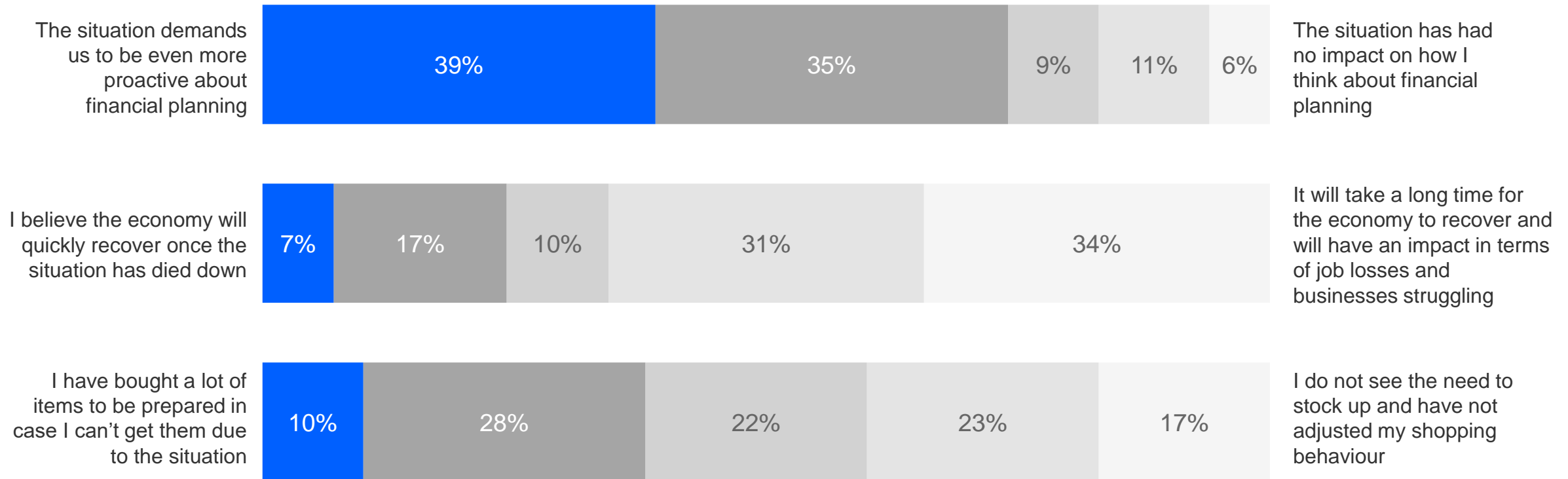


Base: n=504



There is a high level of adjustment towards financial planning and concern towards the macro economy. Our concern has not translated into widespread frenzied incidences of stockpiling experienced elsewhere

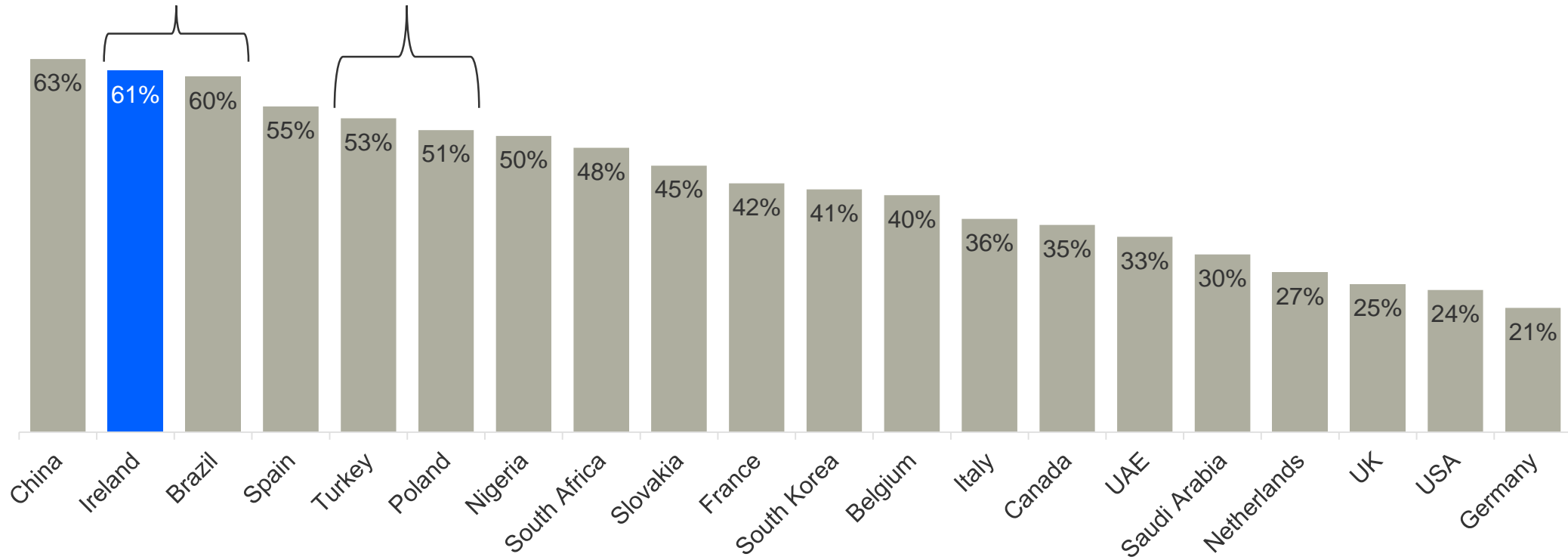
Base: n=504



Concern is naturally heightened in many markets around the world. Some cases of high concern can be caused by cultural and/or country specific conditions

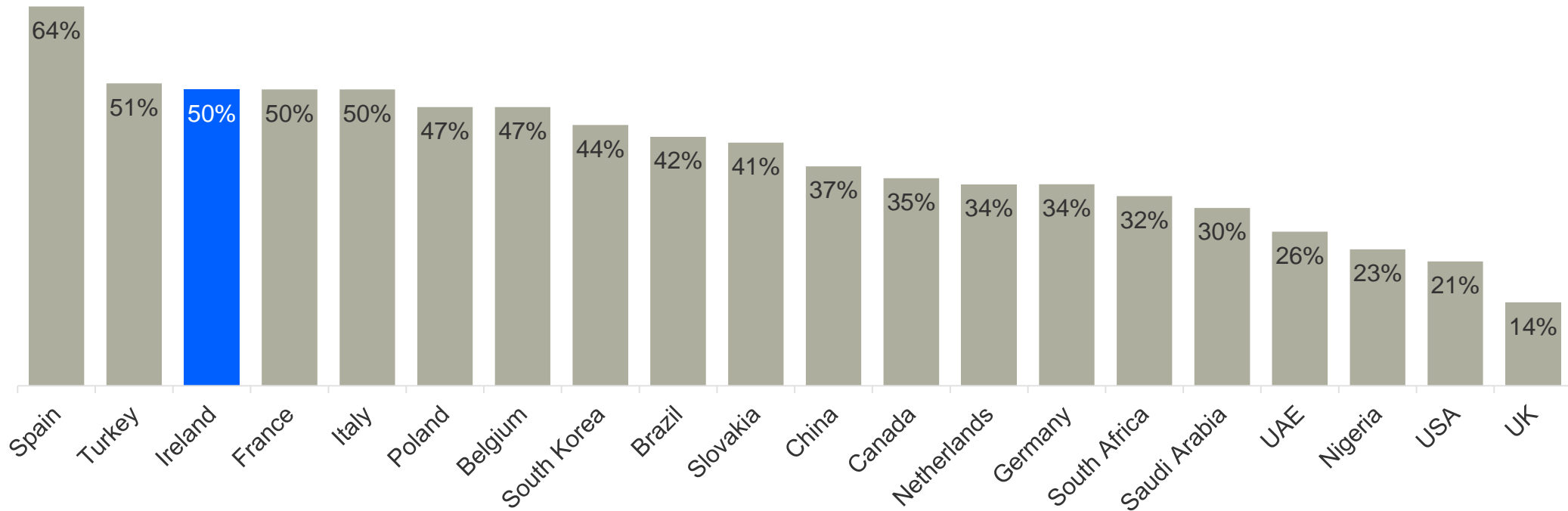
“The situation concerns me hugely”

Ireland, Brazil, Turkey & Poland seem to have particularly elevated levels of concern – not far behind China and beyond the levels you might expect given the number of cases.



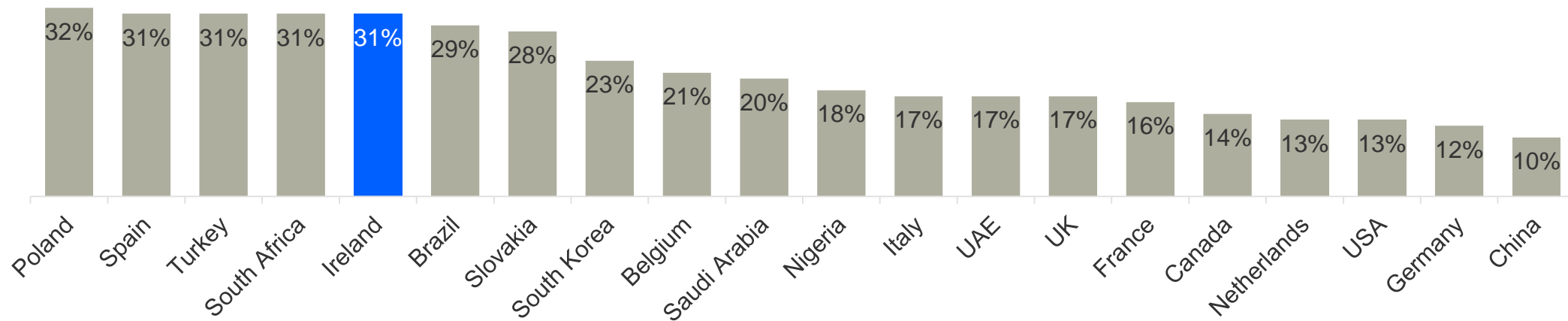
Compared to other markets, the experienced impact on daily lives in Ireland is high

“The situation is impacting my day-to-day life”



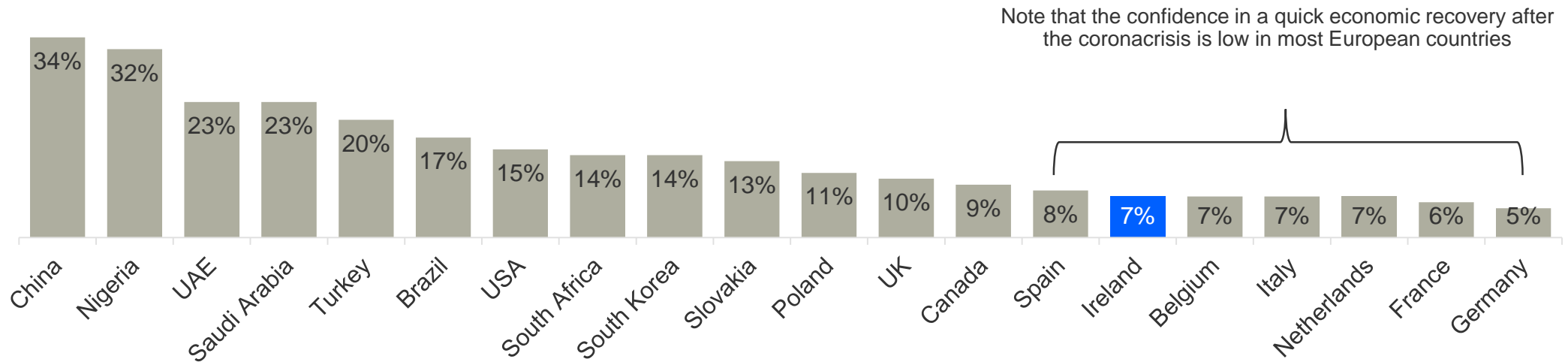
When looking across markets, we observe the Irish are nervous about staying safe even if they take precautions and look after their hygiene

“I am worried about falling sick no matter how much I take care of myself”



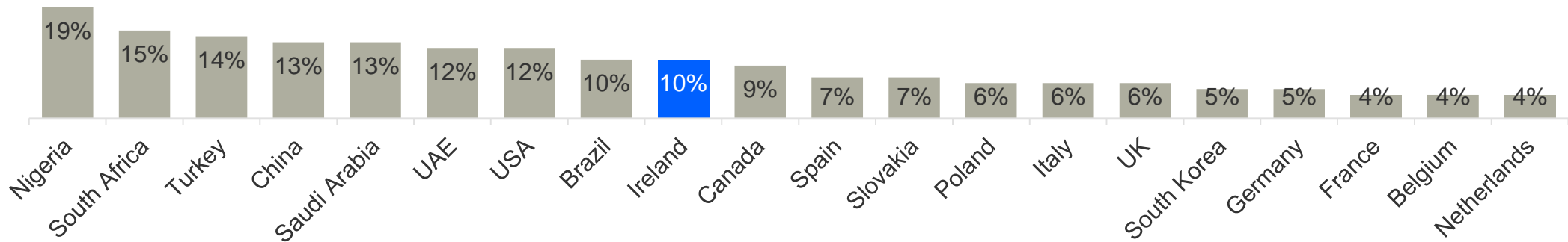
Confidence in a quick economic recovery after the coronavirus crisis is relatively low. The phase of the outbreak in each country does however seem to play a role in this

"I believe the economy will recover quickly once coronavirus situation has died down"



In most countries consumers claim not to have bought a lot of extra items

“I have bought a lot of extra items to be prepared in case I can’t get them due to the coronavirus situation”



When searching for information about coronavirus, Irish consumers are particularly interested in information about diagnosis, followed by information around prevention

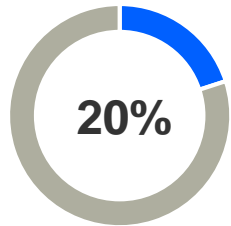


Base: n=504

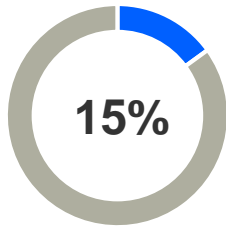
Diagnosis

Prevention

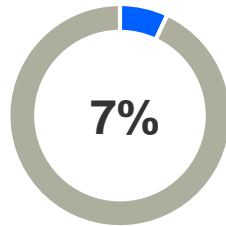
Behaviour



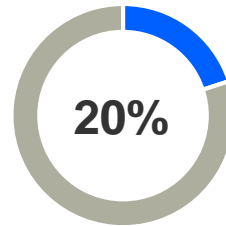
What are the symptoms?



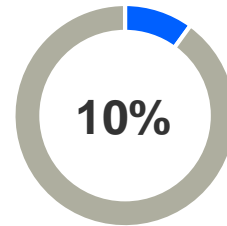
How likely am I to catch the virus?



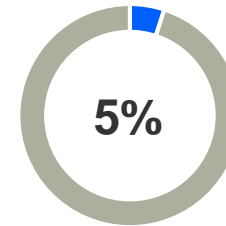
How do I self isolate?



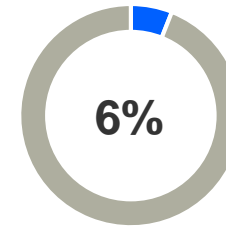
How long does the virus live on surfaces?



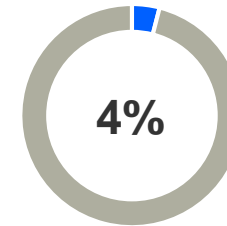
Who is at risk of severe illness?



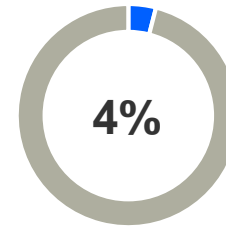
Am I at risk from products shipped from abroad?



Should I wear a facemask?



How should I wash my hands?

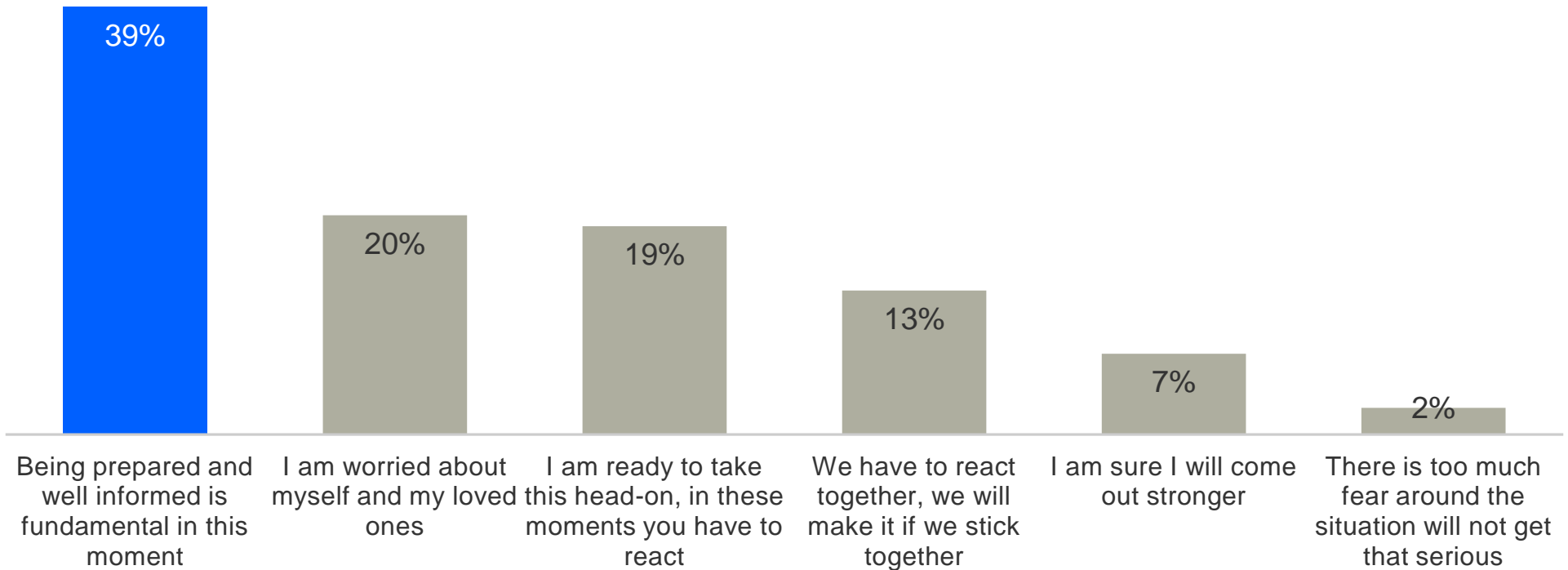



Should I travel abroad?

And this search behaviour contributes towards the Irish desire to be prepared and well informed at this turbulent time



Base: n=504



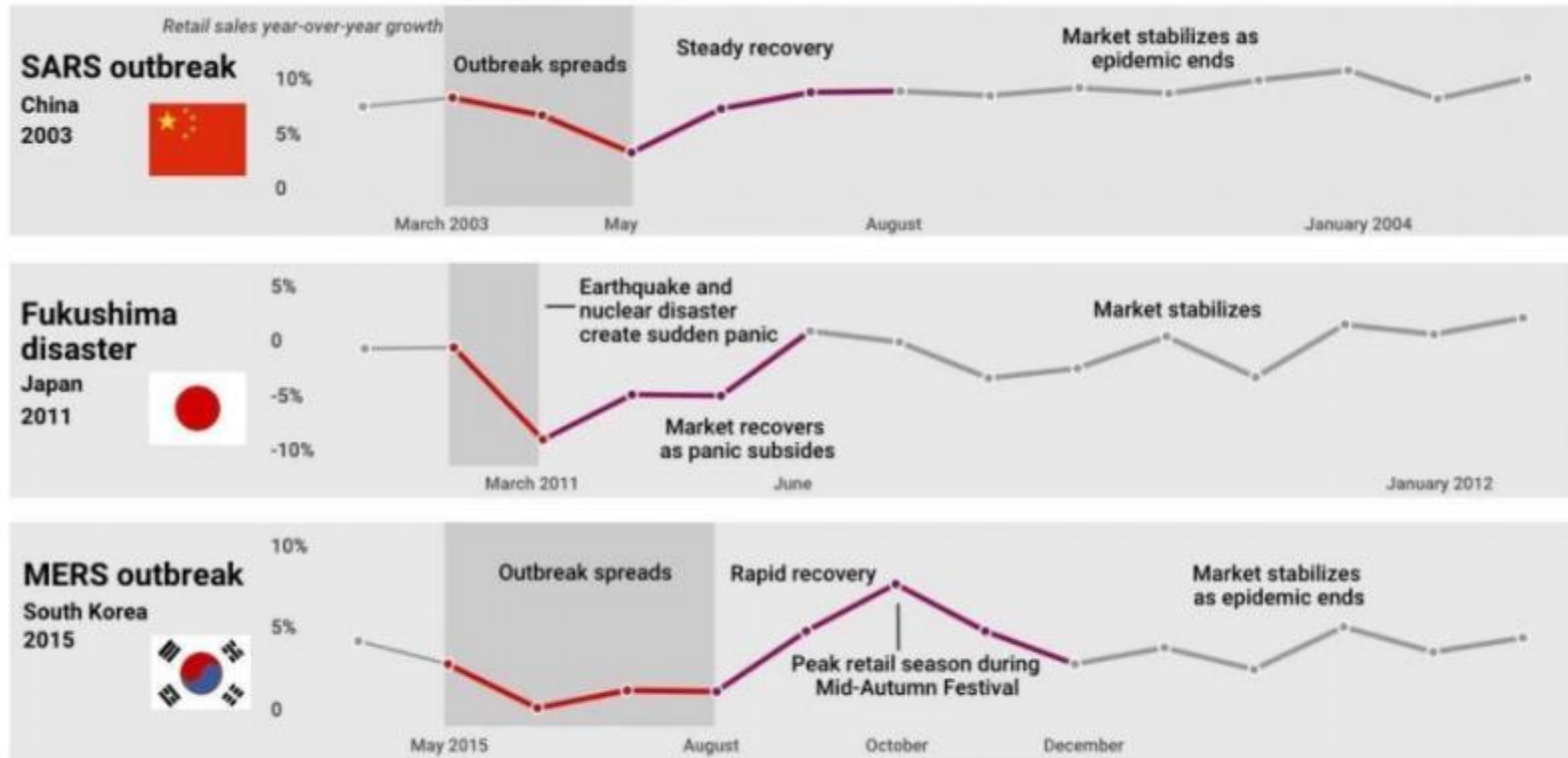
An aerial, high-angle photograph of a complex highway interchange at night. The image is dominated by long, bright yellow and orange light trails from moving vehicles, creating a sense of motion and complexity. The roads are dark, and the surrounding area is mostly black, with some faint lights from buildings or streetlights visible in the background. The overall composition is dynamic and abstract due to the light trails.

**What are the
implications for
brand management?**

First of all, don't lose
sight of the long term



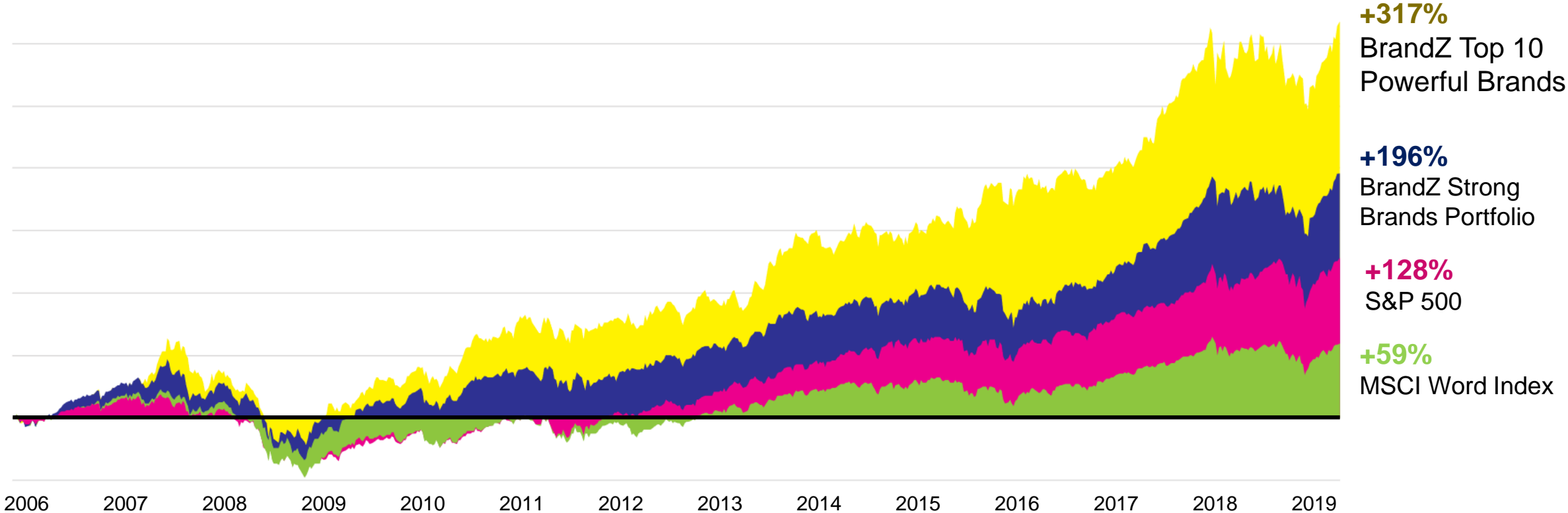
Precedent – Previous events showed elastic economic behavior



Sources: China National Bureau of Statistics; Japan Ministry of Economy, Trade and Industry; South Korea government statistics


Previous epidemic/disasters have shown short term impact, but generally recovery is seen over a period.

We've seen before that strong brands recovered NINE TIMES faster following the financial crisis of 2008



Challenging times
require a disciplined
approach.

Brands must **develop**
a strategy that is in
line with the emotive
positioning of the brand
which will resonate with
people and ensure
aligned messaging



Consumer responses to situations like a crisis are not generic. They are emotional and depend on personality.

Put yourself in your consumers shoes.

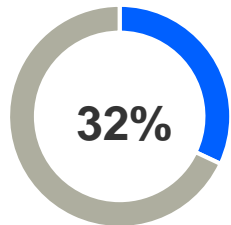
How do they feel, what do they do, what help might they need?

In Ireland, and internationally, consumers want brands to help and comfort them. They are also looking for brands to lead by example and understand them. Consumers also agree this is not a time for brands to be (too) optimistic or unconventional

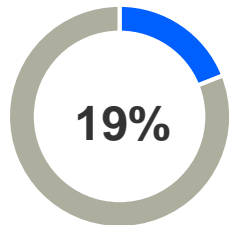


Base: n=504

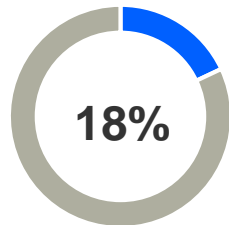
Brands should...



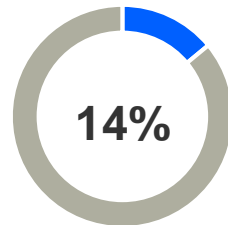
Be practical and realistic and help consumers in their everyday life



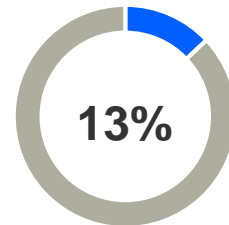
Be an example and guide the change



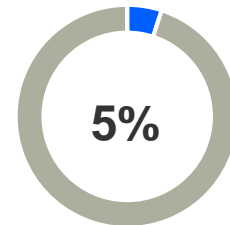
Reduce anxiety and understand consumers' concerns



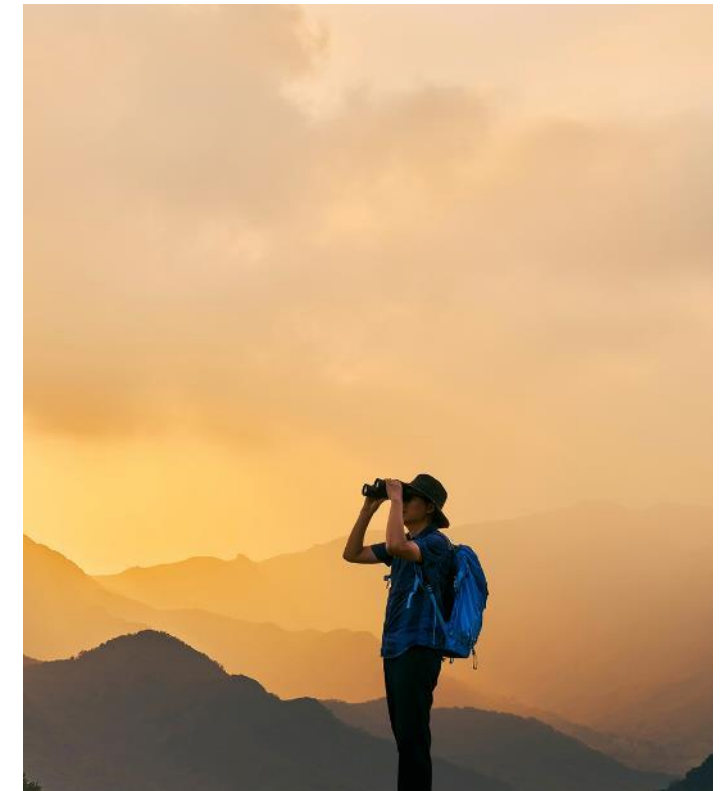
Attack the crisis and demonstrate that it can be fought



Use their knowledge to explain and inform



Be optimistic and think in an unconventional way



And Irish brands are quickly responding to the tough reality while keeping an eye on the consumer



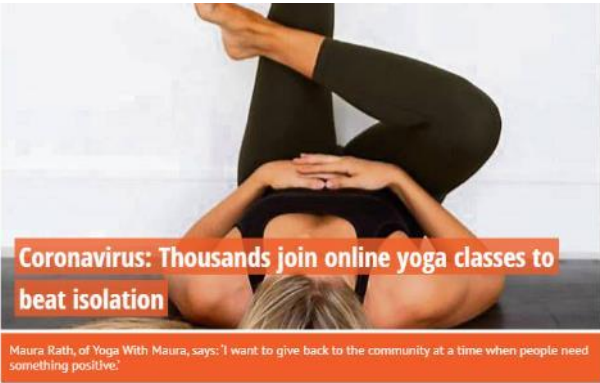
The battle to make sure everyone can work/learn/play (online) from home

Teachers and lecturers being offered free online course to help them teach students during coronavirus crisis



Source: Independent.ie

The battle to stay healthy and fit



Source: Irishexaminer.com

The battle to accommodate the catering industry

77 Irish restaurants that now offer delivery and collection

Restaurateurs in Dublin, Cork and around the State respond to coronavirus shutdown

© Thu, Mar 19, 2020, 14:03 | Updated: Fri, Mar 20, 2020, 17:26

Marie Claire Digby



Now serving takeaways. Nightmarket, in Dublin, one of Ireland's innovating restaurants. Photograph: Nick Bradshaw

A significant number of restaurants around Ireland are offering contactless takeaway and delivery of food from their menus. Here is a list of some that have put these arrangements in place.

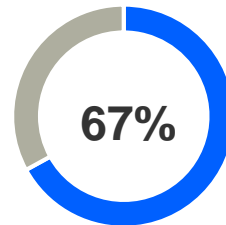
Source: Irishtimes.com

Irish consumers don't want brands to stop advertising but it mustn't be seen as exploitative, inauthentic or inappropriate

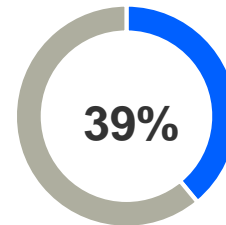


Base: n=504

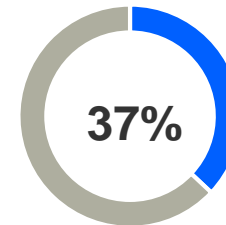
Advertising should...



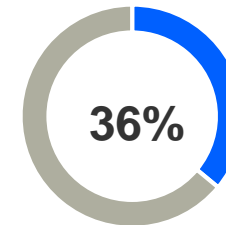
Should **NOT** exploit the coronavirus situation to promote the brand



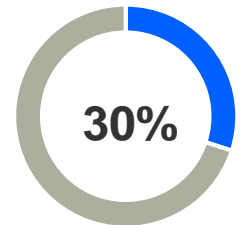
Should talk about how they could be helpful in the new everyday life



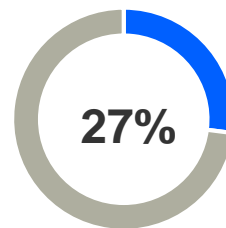
Should inform about their efforts to face the situation



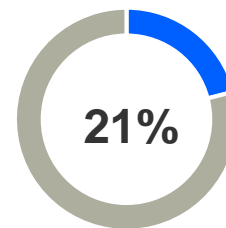
Should use a reassuring tone



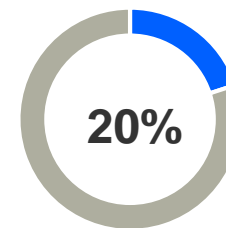
Should offer a positive perspective



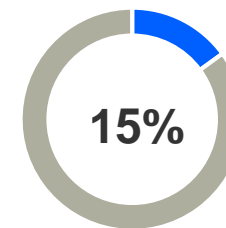
Should communicate the brand values



Should talk about their own brand in a carefree and light way



Should talk about brands like they have always done



Should avoid humorous tones

While the majority of the actions consumers want to see from companies in times of crisis relates to their role as an employer, if activated in the right manner there is a role for companies in the wider community and for interaction with consumers



What should companies do in this moment of crisis?



And many Irish brands are positively (and sensitively) leveraging the hard reality to be more bearable, for both citizens and entrepreneurs



New brand initiatives

Coronavirus: Guinness announces fund to help bar staff and elderly

Brewery's €1.5m will aid public house workers fearing layoff with widespread pub closure

© Tue, Mar 17, 2020, 20:02

Jack Power



Guinness: bar staff fear job losses due to Covid-19. Photograph: Tim Clayton/Corbis

Guinness has announced that they have set up a €1.5M fund in order to support Irish bar staff and the elderly during the public health Crisis

Irish distilleries step up production of hand sanitiser gel

Updated / Friday, 20 Mar 2020 23:29



There has been an enormous demand for hand sanitizer gel

Distilleries in Ireland have halted their usually production in order to join the fight against the spread of COVID-19, now producing hand sanitiser for the HSE

Kitting out: O'Neills making hospital scrubs for virus heroes



Pulling on the jersey: O'Neills has pivoted from sports kits to medical wear

Shawn Pogatchnik

March 24 2020 02:30 AM



Irish sportswear company O'Neill's are now manufacturing scrubs for health care workers

Advertising during COVID-19



Strategically, brands should invest for long term outcomes. While the cause of the current crisis is different, the effect is similar to that which we saw during the financial crisis of 2007-2008. Then, we saw that brands that continued to spend were those that remained strongest and recovered most quickly afterwards.

Long term effects come from delivering lasting impressions that help to keep the brand salient and position it as meaningful and different for when the consumer comes back into the category. Importantly, that meaningful difference doesn't necessarily have to be functionally or product-driven, it can be brand driven or more emotional.

Tactically, decisions will need to be made on a brand by brand basis. There are some brands that should consider slowing down or stopping spend now

- As more countries close their borders or go into lock down, it is not a time to be promoting travel and tourism
- Similarly, be sensitive about advertising categories that people have been told not to use, such as restaurants, out of home entertainment, sports
- Take care with advertising products that in short supply such as toilet paper, personal cleaning products, store-cupboard essentials. Creating demand that cannot be satisfied could drive consumer frustration. It may also be seen as profiteering from the situation.

6 Key Take-Aways for Brands



#1

Get the cue for your tone of voice from consumers.

Think ahead and take constant temperature checks so you understand the changing public mood and sentiment.

#2

Enable future planning.

Remind consumers of the future and enable them to make plans for it.

#3

Be an enabler of resourcefulness.

Support consumers with ideas, products and services that help them adapt.

#4

Help create moments of calmness and joy.

Consider how you can play a role in maintaining mental and emotional wellbeing.

#5

Help people learn new skills, make and create.

Recognise consumers' desire to be more active and creative with your products and services.

#6

Identify the essentials that matter to your consumer.

Understand that people's needs continue to be individual. Help people lead the lifestyles they want and pursue their passions.

**How are we
consuming?**



We know from observations of the situations in Ireland and elsewhere that consumer behaviour changes during the COVID-19 crisis in multiple categories

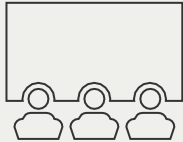


For some categories, the current coronavirus situation will lead to higher sales, for some the situation means a negative impact on business results

Categories that see a negative impact



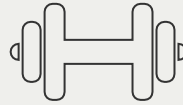
Out of home dining



Out of home entertainment



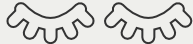
Out of home drinking



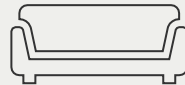
Sports facilities



Retail stores



Beauty facilities



Furnishing stores

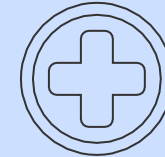


Travel

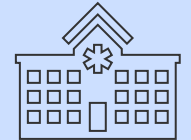
Categories that see a positive impact



Fast moving consumer goods



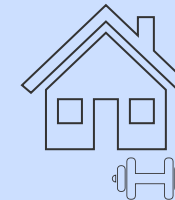
Health products



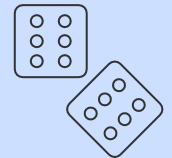
Health insurance



At home streaming



At home sports equipment



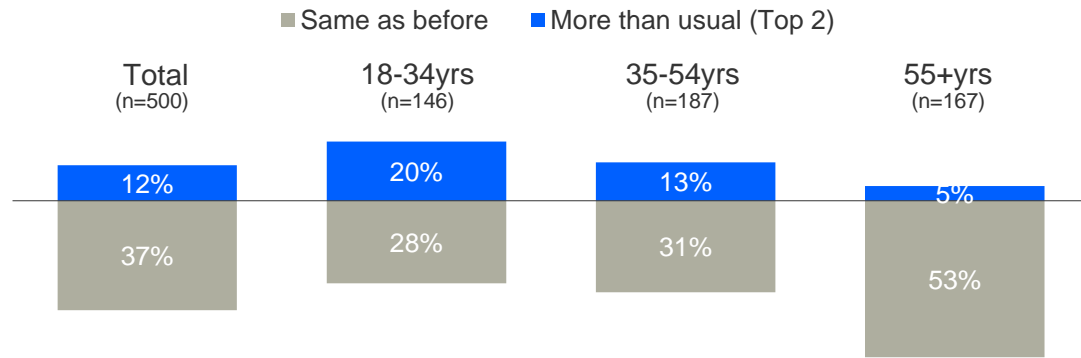
At home gaming

In terms of shopping, less than 2 in 5 consumers are shopping as usual across bricks and mortar stores. Substantial proportion claiming their online shopping behaviour will increase in the future

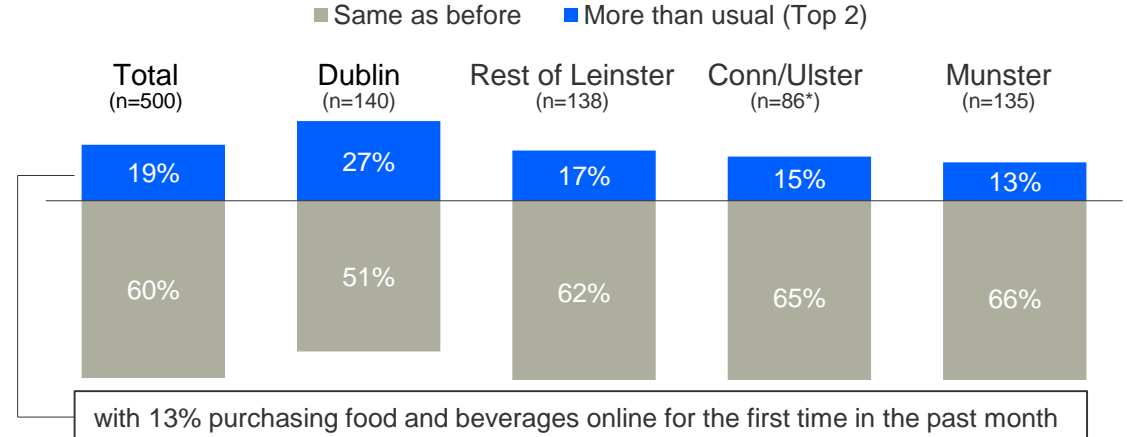


18-34 year-olds and those living in Dublin expect their online shopping behaviour to increase in the future

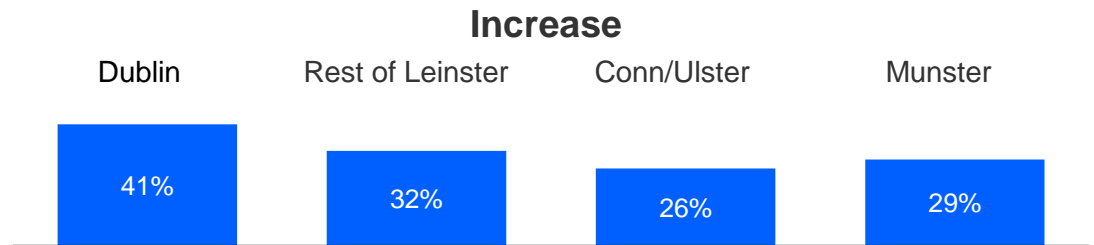
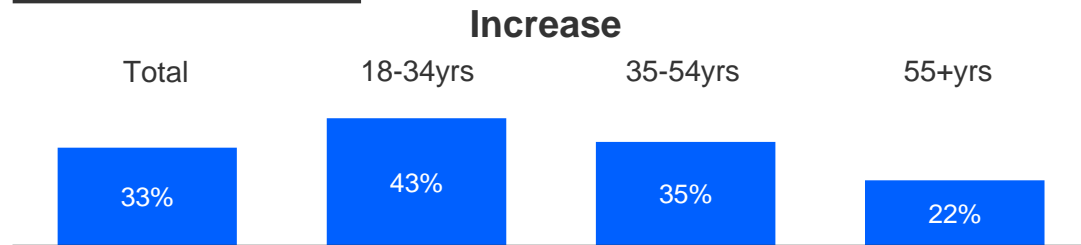
Shopping at physical outlets



Shopping at online e-commerce websites



Expected future shopping behaviour online



Supermarkets and home delivery services are experiencing unprecedented demand



Grocery delivery startup Buymie is managing a 'huge increase' in demand as people stay home

The company wants to help the government and retailers distribute groceries to vulnerable citizens.

Supermarkets report rocketing demand for home deliveries

Calls for online slots to be left clear for at-risk groups

© Wed, Mar 18, 2020, 17:41

Laura Slattery



Observing social distancing at a supermarket in Dublin. Photograph: Alan Betson / The Irish Times

We see an increase for the purchase of 'stock up' products, such as long shelf-life food and sanitizing products. Product discounts, offers and provenance appear to be less important in this time of crisis

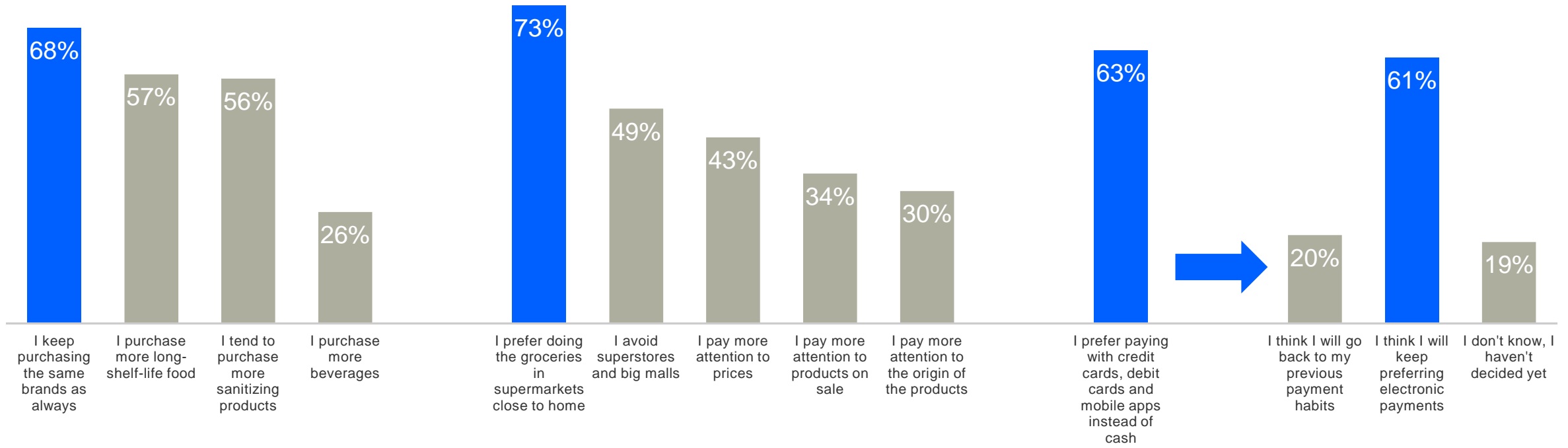


Purchasing more of ...

Changes in shopping behaviours...

Payment

Of which...



Purchase of 'stock up' products is leading to some initial empty shelves & shortages



Public urged to avoid bulk buying groceries

Updated / Monday, 16 Mar 2020 09:44



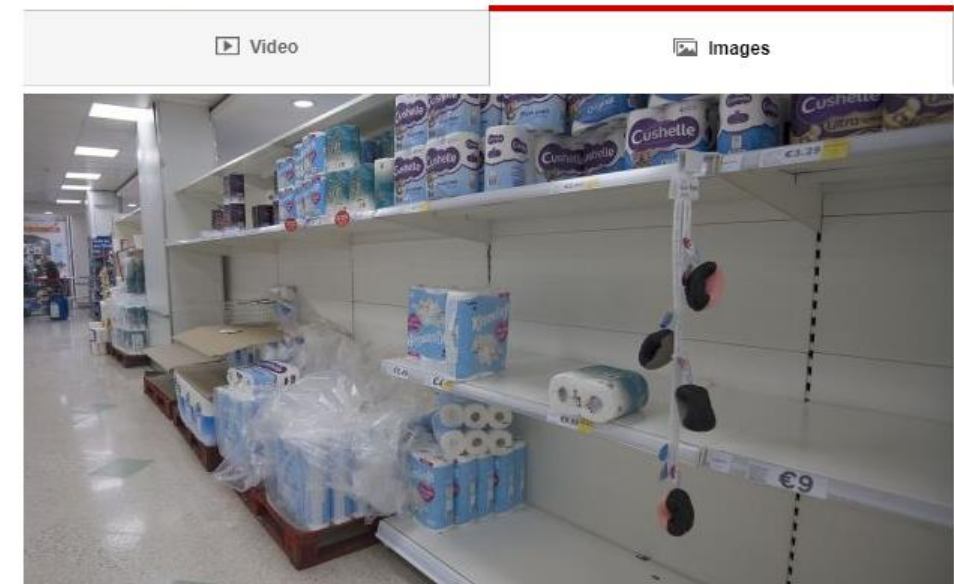
Retail Ireland said there are no issues whatsoever with the supply chain and there is therefore no rationale for people to panic buy

Coronavirus: Toilet paper manufacturer struggles to meet 'unprecedented demand'

Ireland's leading producer is at capacity despite producing 50,000 rolls an hour

Sat, Mar 14, 2020, 03:39

Ronan McGreevy

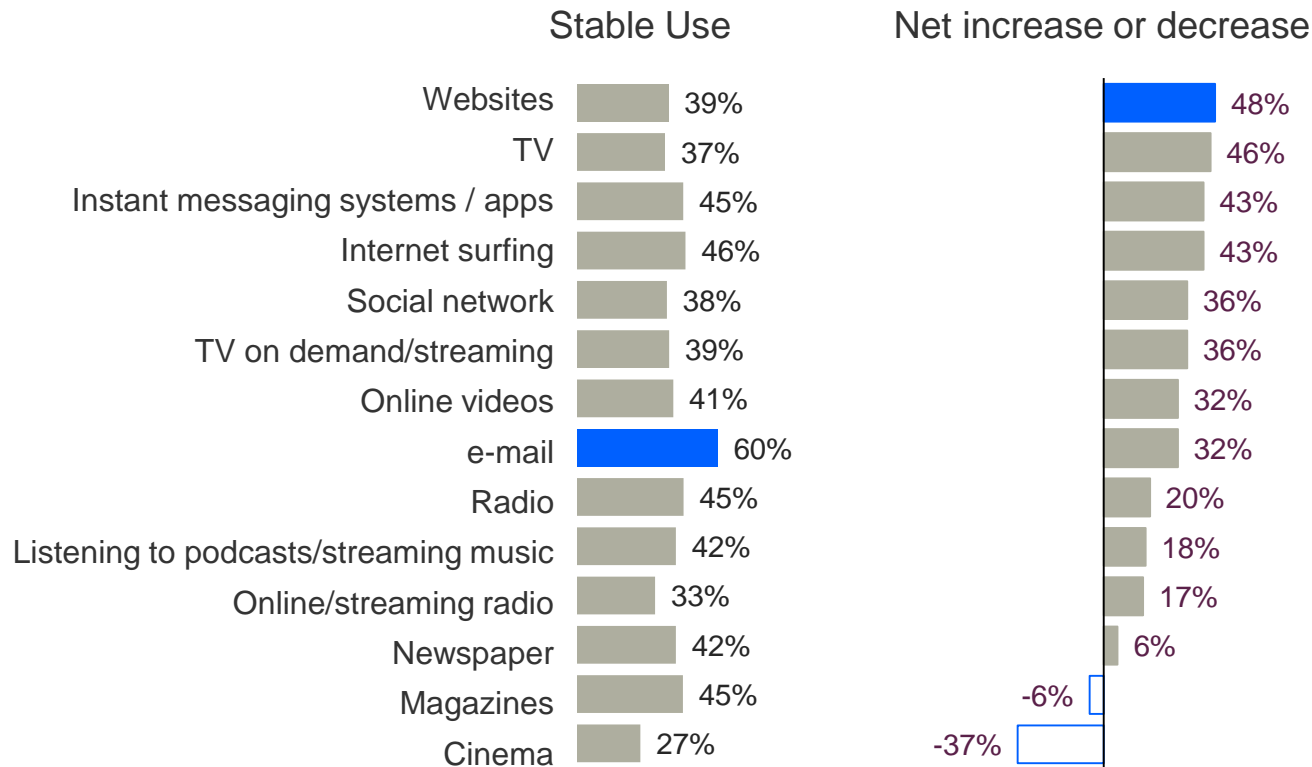


Orders for toilet tissue have increased by 200 per cent since the coronavirus outbreak began, Aldar Tissue managing director Darren Farrell said. Photograph: Dave Meehan

In terms of media consumption, given the limits on out of home activities there is an opportunity to invest in media that sees an increased consumption, such as TV and internet



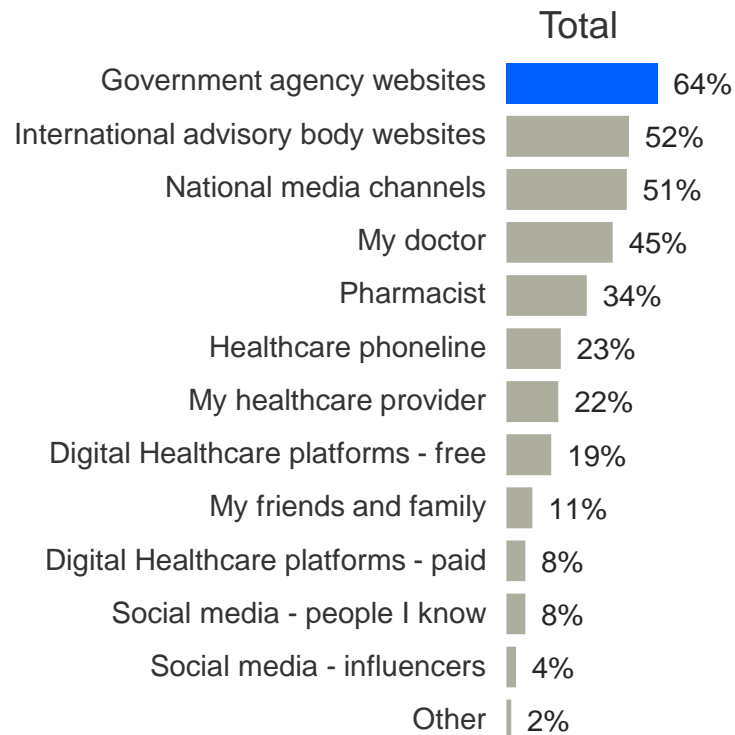
Changes in media consumption among users



The most trusted sources for COVID-19 information are government and official advisory sites, followed by national media channels and healthcare professionals



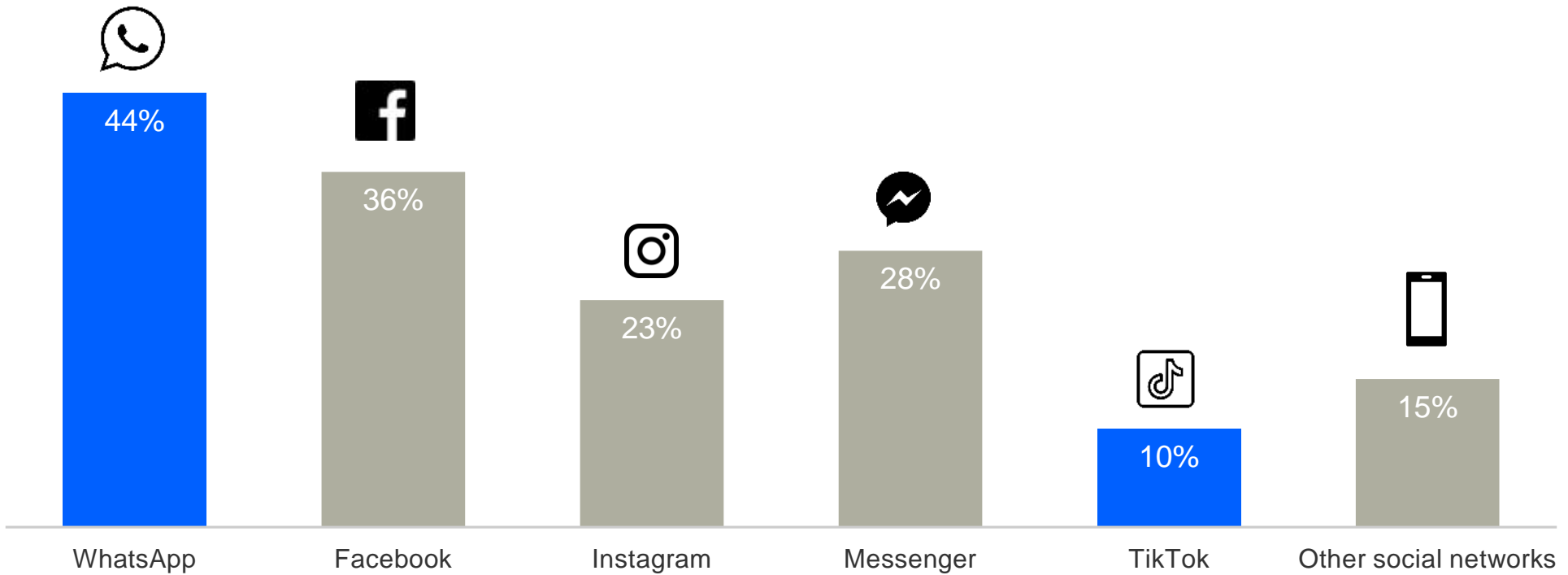
Most trusted sources for COVID-19 information



For social media usage, Whatsapp sees the biggest increase among users, while music app TikTok sees the smallest increase among its users



Increase in usage of social media platforms

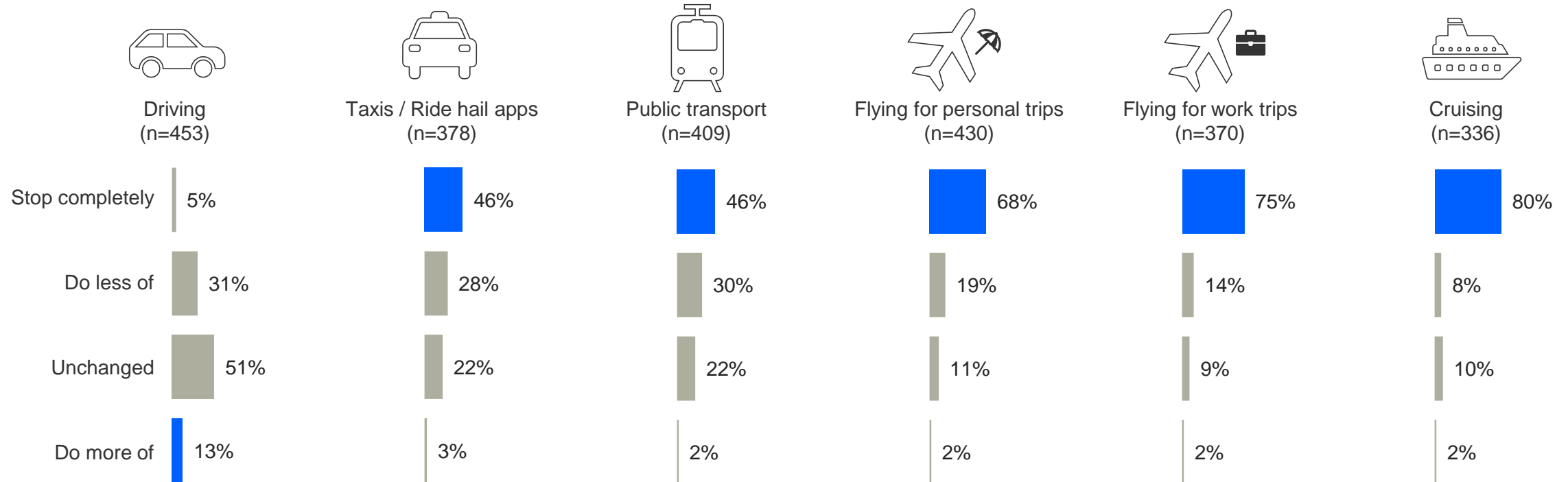


With the exception of driving, most transportation types are expected to be used significantly less than usual in the near future



Lowest expected impact on usage

Highest expected impact on usage

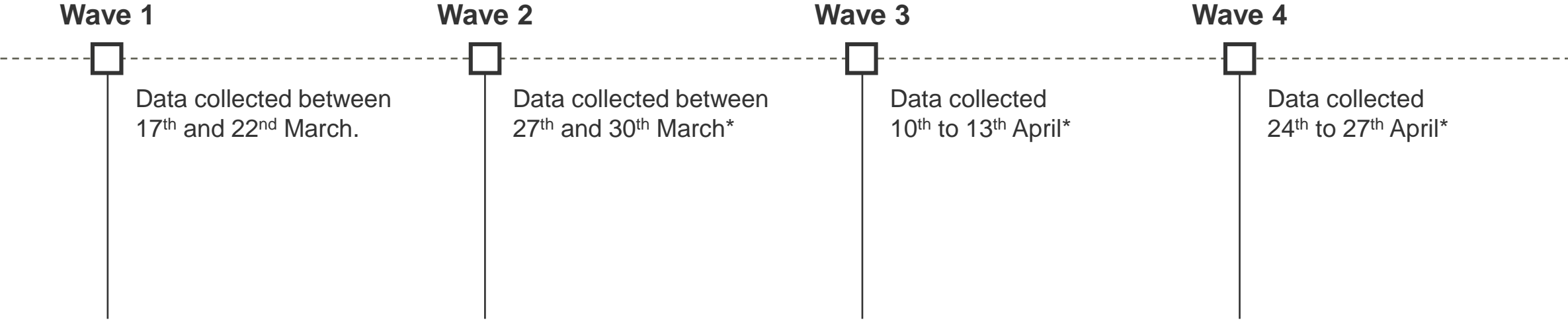


**The insights you are looking at, were collected in Wave 1 of
Kantar's global COVID19 monitor**

**We will continue to measure behaviours and attitudes over
another 3 waves**

**The study is running in 50+ countries worldwide speaking with
over 26,000 consumers**

Ongoing waves will give you the relevant information you need throughout the crisis, and help you to adjust to the new normal



Discover the data your way

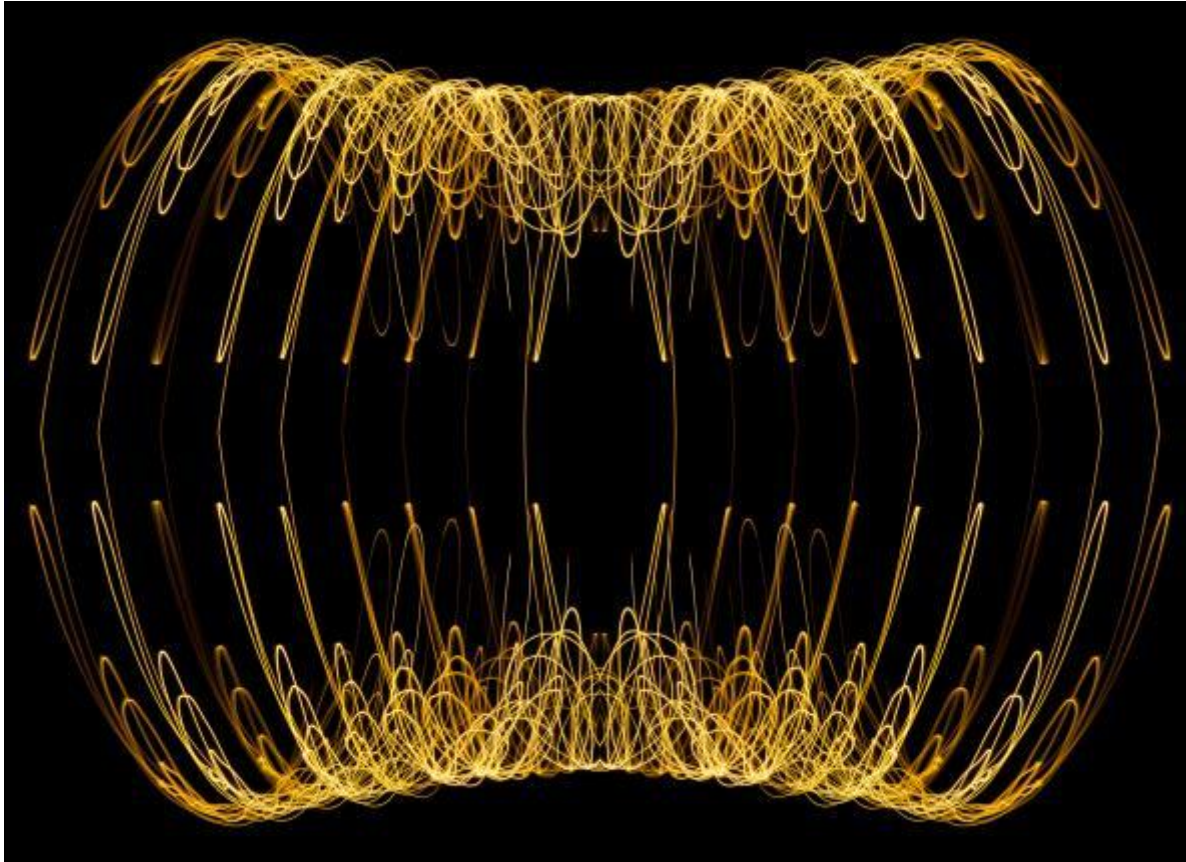
**Discuss. Explore. Analyse.
Take action.**

Get all the data for all countries in all core formats (Tables and PowerPoint) so you can explore the data further.

And use Kantar's expertise to quickly understand how your business should be reacting and what actions you should be taking.



Sign up for further Kantar COVID-19 insights ...



Menu of Options (ex VAT)


	1 wave	2 waves	4 waves
Republic of Ireland	€0	€4,000	€6,000
All relevant markets	€6,000	€8,500	€11,500

For more information,
reach out to your local Kantar expert
or get in touch with louise.soye@kantar.com

We are here to help – for additional resources and further content visit [Kantar.com/inspiration/coronavirus](https://www.kantar.com/inspiration/coronavirus)



KANTAR Understand People Inspire Growth



Assessing the impact:
A cross industry view on the impact of COVID in China

igation/blogs/post/mb-blog/2020/03/20/recommendations-for-brands-media-and-content-during-the-covid-19-crisis

Subscribe Kantar Marketplace News & Events Blog Search

News & Events News & Events Blog

Recommendations for brands, media and content during the COVID-19 crisis


by Nigel Hollis | March 20, 2020 | 1 comment

In these unprecedented times, I thought it would be good to share some of Kantar's thinking on what brands should do during the Covid-19 pandemic. Here are links to three posts that offer a wealth of insights and recommendations:

- 1) A [checklist](#) of actions for brands from J. Walker-Smith
- 2) Thoughts on [media](#) from Jane Ostler
- 3) Thoughts on [content](#) from Daren Poole

In addition we have recently [published](#) the Covid-19 Barometer, the leading study on how Covid-19 is influencing consumer's behaviours, attitudes and expectations, covering over 30 markets.

I will post additional thoughts next Monday.




1 comment

<http://www.millwardbrown.com/global-navigation/blogs/post/mb-blog/2020/03/20/recommendations-for-brands-media-and-content-during-the-covid-19-crisis>

KANTAR

COVID-19 Checklist for brands



... along with bespoke solutions to answer specific business issues



CORONAVIRUS GLOBAL **STAN** LANDSCAPE

DEPLOYING KANTAR'S ANALYTICS AI TOOLKIT AND EXPERTISE TO HELP BRANDS NAVIGATING THROUGH THE UNKNOWN

STAN - SUPERCHARGING HUMAN INTELLIGENCE THROUGH AI

KANTAR

KANTAR

EVA

"We Stick Together by Staying Apart!"
Using Enhanced Visual Analytics to take a look at what people really get up to in Self-Isolation.

Instagram, Facebook, Twitter, Pinterest, Tumblr icons

KANTAR

Deep, human understanding through unpredictable times

Digital Qualitative Solutions

March 2020

KANTAR

Creative evaluation and putting budget behind copy at this extraordinary time

First thoughts and recommendations on how to ensure business continuity, why continue with research, ensuring the strongest impact and limiting brand damage

March 2020

BRANDZ

THE LARGEST Brand Building Platform In The World

Est. 1998

100 Global Brands

- 166k BRANDS
- 454 CATEGORIES
- 51 MARKETS
- 3.7m CONSUMER INTERVIEWS
- 5.2B DATA POINTS

KANTAR WPP

It has never
been more
important to find
the signal in the
noise