COVID-19 **Roadmap** to **Recovery**

Consumer confidence and demand for restriction lifting.

Compiled by core™ Research

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14th May 2020

Public Confidence

There is a need to understand when people are comfortable with restrictions being lifted to understand when they will participate in society and economy.

The high level of compliance with stay at home restrictions has resulted in greater control of COVID-19 in Ireland. The country will always remember the pain and grief many families and communities have experienced as a result of losing a loved one, but public health officials are confident that restrictions can be reviewed, while acknowledging COVID-19 is with us for an uncertain period of time.

The Irish Government has announced a five phase approach to re-opening our society and economy, currently planned from Monday 18th May. Core Research's latest report, *Roadmap to Recovery*, analyses the public sentiment and confidence towards the re-opening of the country.

This research, conducted from Friday 8th May to Monday 11th May, surveyed a nationally representative sample of 1,000 adults asking them about lifting restrictions in terms of what were important to the public and when people would be confident in returning to different areas of life.

Informed by the Government roadmap, this research focuses on five categories - community health (including social interaction), retail and commercial, education & childcare, economic (including work) and cultural & sport. Across these categories, people rank **38 behaviours or activities in terms of personal importance** (e.g. returning to work, opening cafes, or attending sporting events) and **when they would be confident in returning** to these behaviours.

Analysis has indicated that demand for each of these can be categorised into three types, according to when people would be confident with different spaces being re-opened:

1. **Pent up demand**: the percent of people who want restrictions to be *lifted ahead* of the Government's proposed phase.
The average pent up demand is currently at 35% of adults.

2. **Phased demand**: the percent of people who agree with lifting restrictions *at the currently planned phased date*.
The average phased demand is currently at 18% of adults.

3. **Delayed demand**: the percent of people who are only confident that restrictions should be lifted *after* the Government's proposed phase.
The average delayed demand is currently at 45% of adults.

These averages vary significantly by activity, and inform how organisations, businesses and society can prepare for the various levels of demand across the summer months.

Currently, by the end of the summer, the majority of the population is confident to return to every aspect of life (except travel abroad) as long as health and safety practices are in place.

This report provides an understanding of the growth in public confidence across the summer months.

Key findings

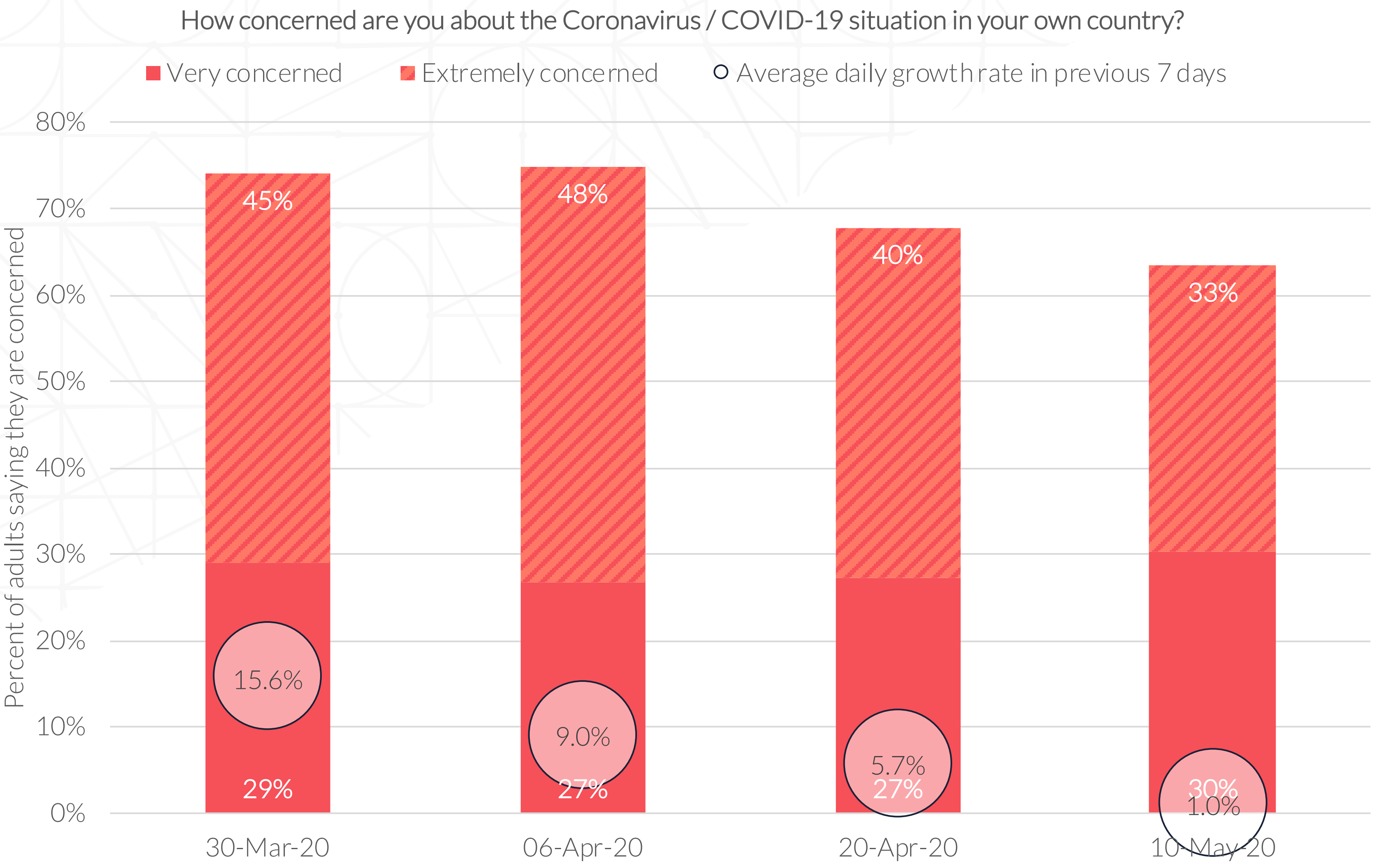
- **63% of people are very/extremely concerned about COVID-19**, down from 74% at the end of March 2020.
- **61% are optimistic** that Ireland will overcome the outbreak, a slight decline from 67% in March 2020.
- **83% of people positively approve of local businesses** and shops, continuing to have the highest public approval.
- The **Government's rating remains high at 75%** public approval, but has declined from 82% in March 2020.
- **58% of people approve of of large companies** handling of the COVID-19 situation, declining from 65% in April.
- **65% of citizens believe citizens are handling the pandemic well**, returning to the level it was at when the outbreak began.
- 70% of people remain convinced the outbreak will last beyond 1st September and into next year.
- **Community health restriction lifts are the most important** to the Irish public – e.g. travel beyond your region or meet people. On average, 57% of people say these are important to them and 57% of people will be confident in returning to these behaviours when the restrictions are lifted.
- In terms of economic restriction lifts, **57% of people say getting back to the workplace is most important** with 54% of the population saying they would be confident returning by the end of June, however less people (39%) would be confident about getting public transport.
- In the **retail category**, the percent of people who will be confident about reopening shops will increase from 21% of people in Phase 1 (May), to 53% of people in Phase 3 (July) and 78% of people in Phase 5 (August).
  Outdoor retail will have a higher confidence level at the start of the summer – e.g. 39% of people are confident about Gardening Centres opening in Phase 1.
- When **cultural and social spaces** open in Phase 5 as currently planned in the Government Roadmap, 57% of people would be confident in returning to these spaces, increasing to 70% of the adult population by the 1st September.
- Focusing on **travel and tourism**, in Phase 4, half of the population would have confidence in hotels re-opening. This is a larger percentage of people (28%) who would be confident in travelling, suggesting an opportunity for domestic tourism.

Citizens remain vigilant, with 63% saying they are concerned about Covid-19

Ireland still treating the crisis seriously

The average daily Covid-19 case growth rate at the time of research for this most recent wave was 1.0% - which had fallen from 15.6% in our first wave.

This control of the outbreak has translated into a decline in concern about Covid-19 but the majority of the population remain vigilant about the outbreak.



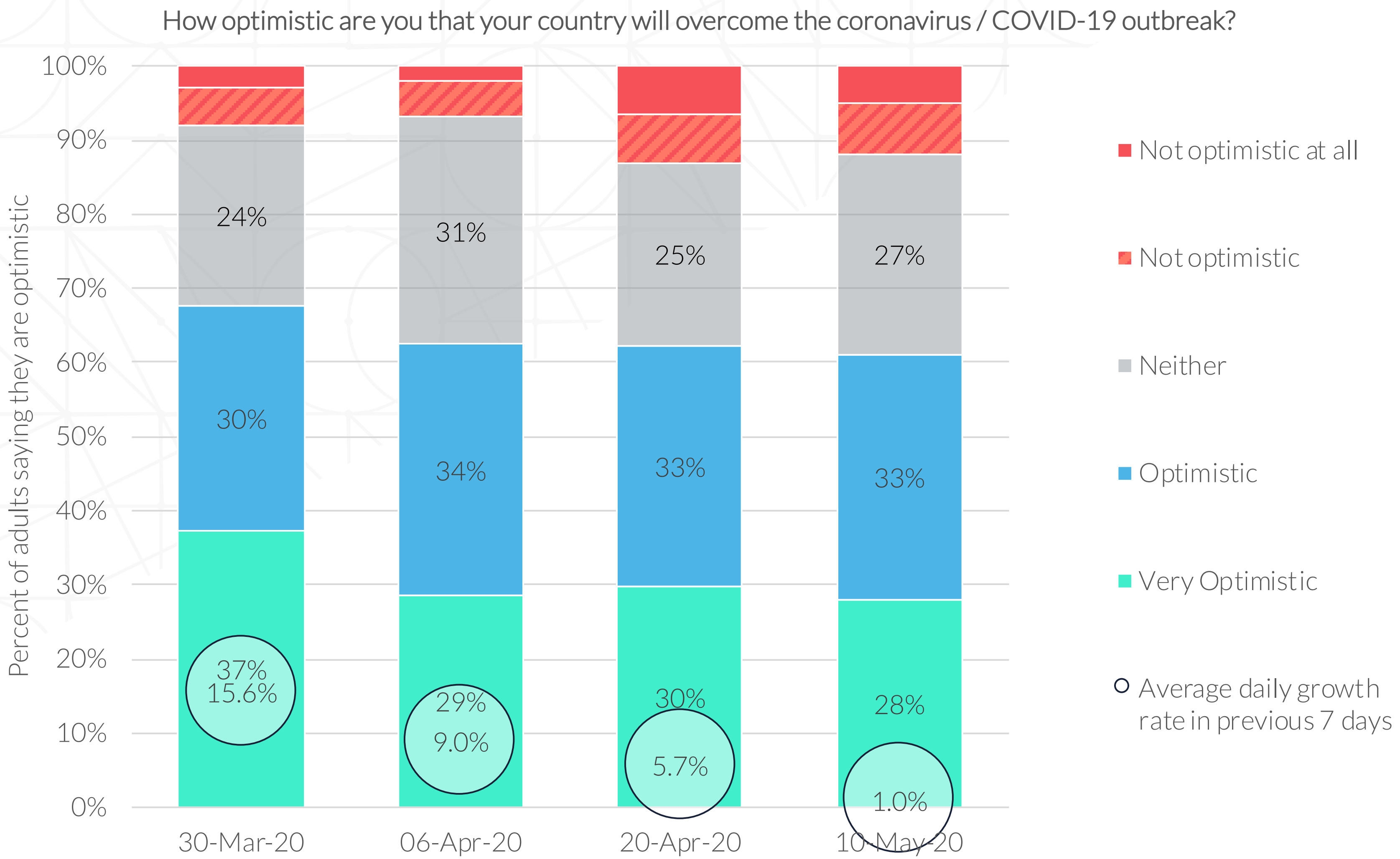
Source: 1,000 adults surveyed online, representative of the adult population in Ireland.
Fieldwork: 30th March; 6th and 20th April 2020; 11th May 2020.

61% of the population are optimistic that we will overcome.

The percent of people who are optimistic that Ireland will overcome Covid-19 remains flat.

61% of people are optimistic about controlling the outbreak while 27% of adults are uncertain and this has translated into a high level of worry and anxiety among this group.

Transparent, up to date and relevant information will ease this sense of uncertainty.



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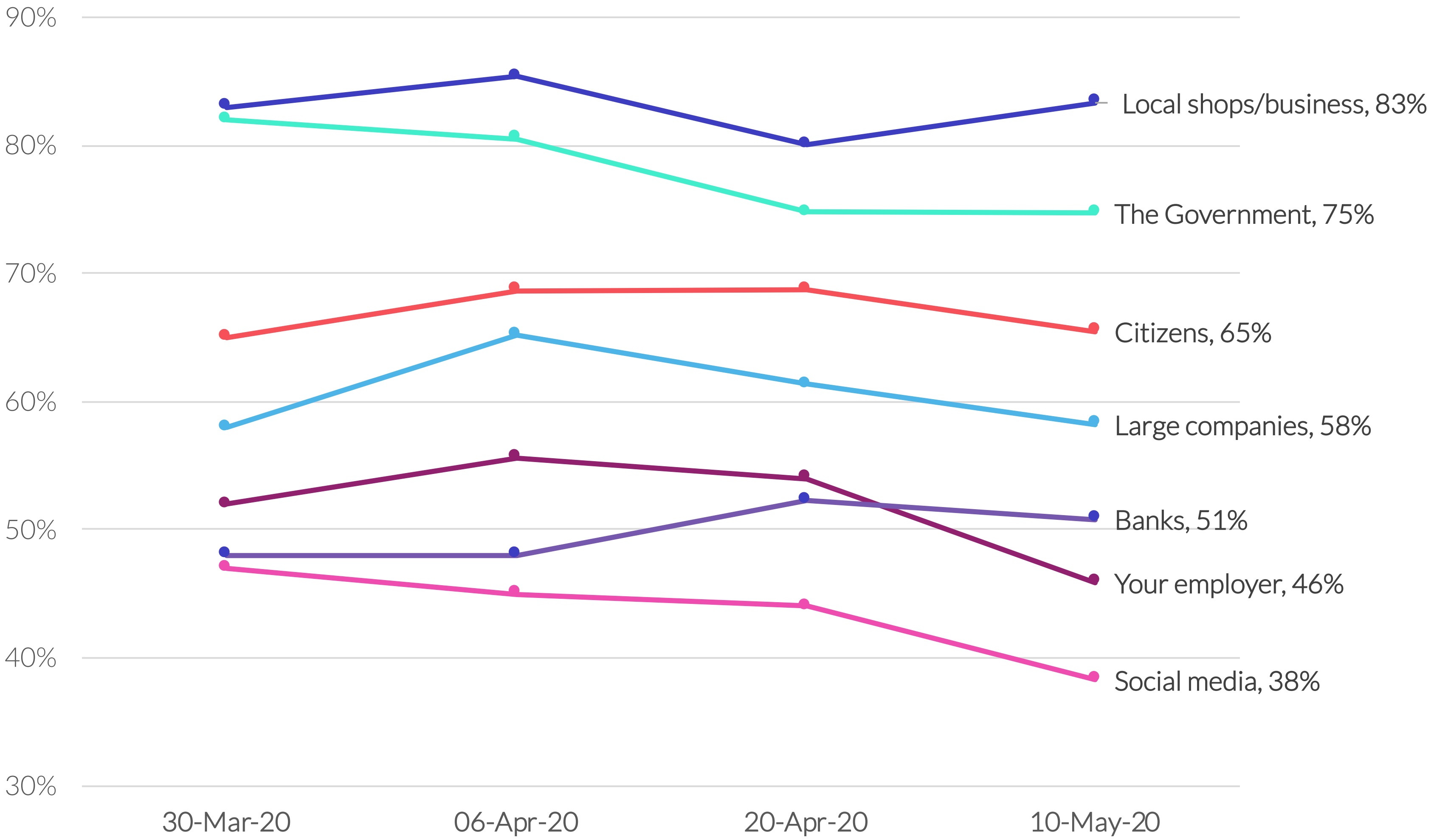
Strong support continues for local shops

Slight decline for large companies.

Local businesses continue to rank the most high on the public's approval rating. Over 80% of people believe they are handling the situation in a positive way. As restrictions begin to lift, this positive approval should translate into a return to supporting local businesses who have been impacted.

There has been a slight decline for fellow citizens, which maybe as a result of how people view how other's are complying or not with the current restrictions, however community solitary remains strong with two in three people believing their neighbours (other citizens) are handling the situation well.

Public approval: Percent who think stakeholder is handling the outbreak well



How much do you approve / disapprove of how the following have handled the coronavirus / COVID-19 outbreak so far?
Source: 1,000 adults surveyed online, representative of the adult population in Ireland.
Fieldwork: 30th March; 6th and 20th April 2020; 11th May 2020.

Length of outbreak

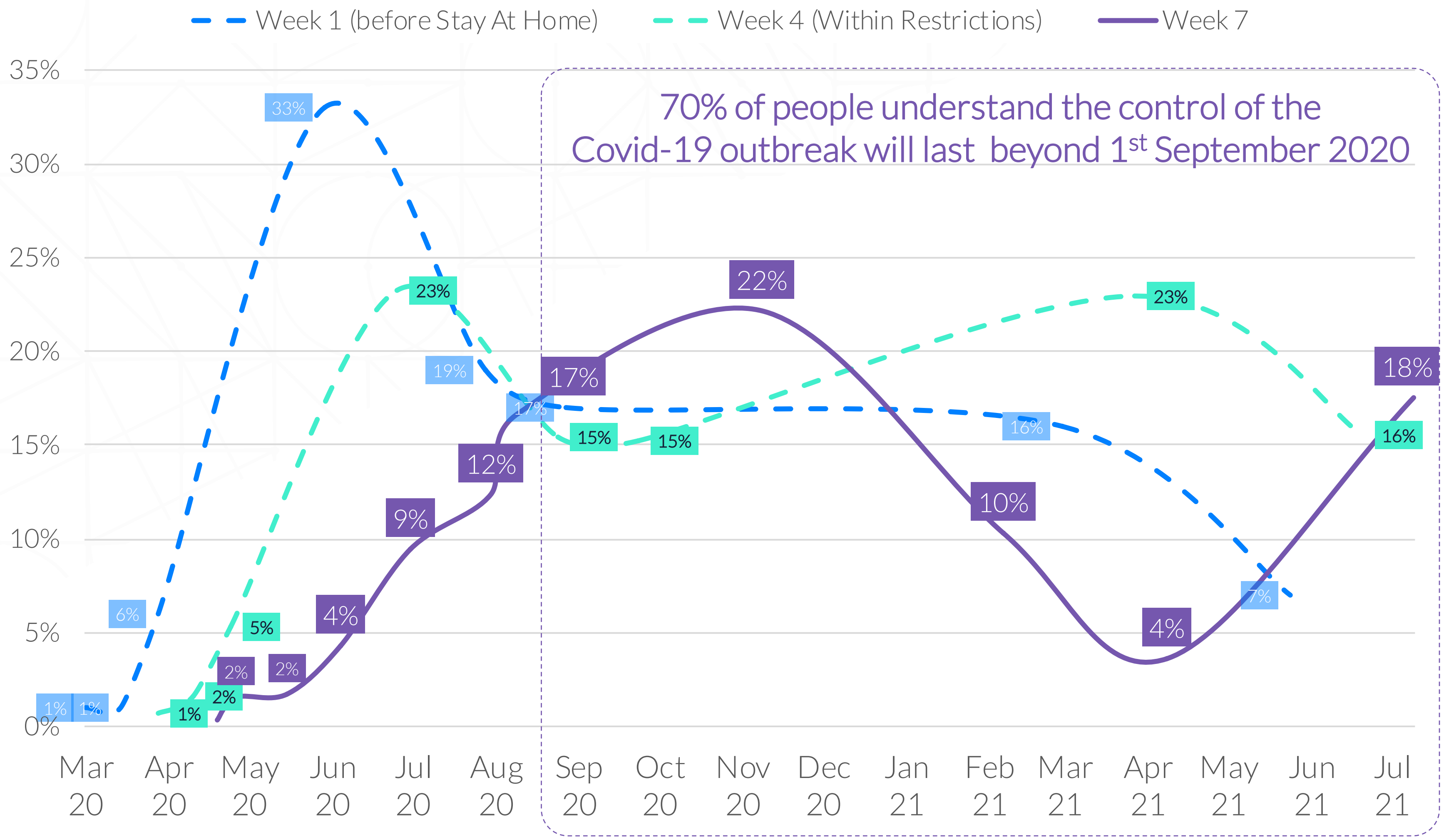
Majority are prepared for the long-term.

As outlined in our report on 22 April, 70% believe the COVID-19 outbreak will last beyond 1st September.

While the population is optimistic, they are pragmatic and understand the serious concern about COVID-19.

Despite people understanding the outbreak will last beyond September, there is a preparedness to re-engage with society and the economy in safe ways across the summer months.

How long do you think the Coronavirus/ COVID-19 outbreak will last in Ireland?



Source: 1,000 adults surveyed online, representative of the adult population in Ireland.
Fieldwork: Week 1 30th March 2020; Week 4 20th April 2020; Week7 11th May 2020.

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Understanding
Consumer Confidence

Analysis of when people want to return to spaces across different areas of society and the economy

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Six Categories

38 activities across Society & Business.

Informed by the Government's Roadmap for Reopening Society & Business, the research surveyed people about 38 activities.

Participants were asked how important to them was the re-opening, returning or re-starting of these areas.

They were also asked when on a timeline scale would they be confident in these areas re-opening, returning or re-starting. Each activity was qualified, for the participant, with the assumption that there would be a high level of health and safety measures in place.

Community Health	Cultural & Social	Economic	Education & Childcare	Retail, Services & Commercial	Travel & Tourism
Meeting a small group outside.	Opening outdoor sports e.g. pitches	Building sites	Childcare	DIY shops	Traveling abroad
Home visits	Eat in restaurants	Returning to work.	Colleges	Gardening centres	Using public transport
Social events (e.g. wedding).	Playgrounds		Schools	Takeaways	Hotels
Travelling beyond 20KM.	Coffee shops			Sports shops	
Travelling beyond 5KM.	Bars and nightclubs			Electronic / Phone shops	
	Pubs			Book shops	
	Attending a sports			Furniture & home stores	
	Places of worship			Pet shops	
	Theatres			Banks	
	Cinemas			Barbers and Hairdressers	
	Gyms			Clothing and shoe shops	
	Museums			Dentists	
				Shopping centres	

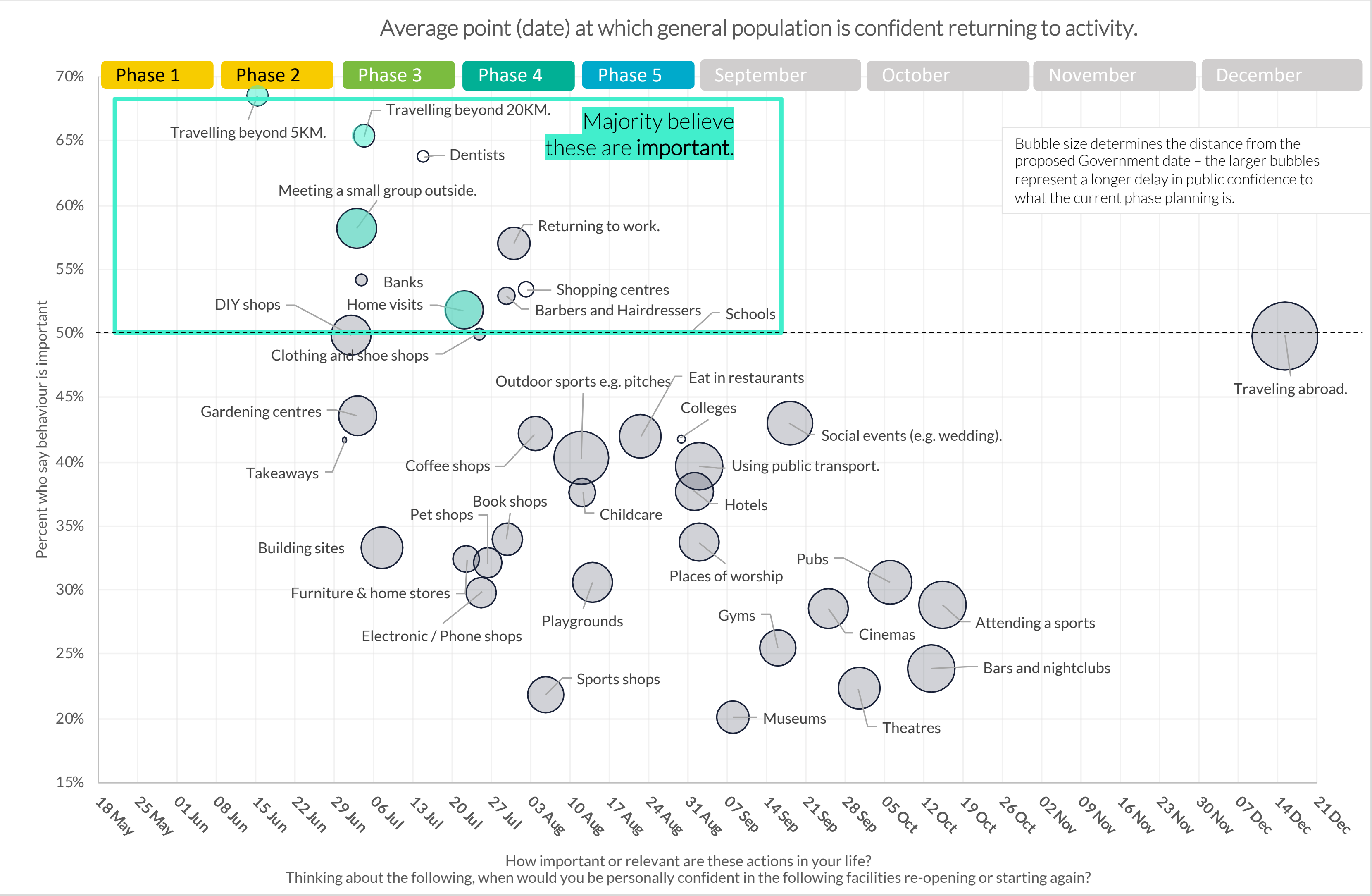
Current Roadmap Timeline

Phase 1	Phase 2	Phase 3	Phase 4	Phase 5	
18-May-20	08-Jun-20	29-Jun-20	22-Jul-20	21-Aug-20	01-Sep-20
Takeaways (already possible)	Home visits	Travelling beyond 5KM	Social events (e.g. wedding)	Bars and nightclubs	Colleges
Meeting a small group outside.		Eat in restaurants	Travelling beyond 20KM	Pubs	Schools
Opening outdoor sports e.g. pitches		Playgrounds	Places of worship	Attending a sports	
Building sites		Coffee shops	Childcare (beyond healthcare workers)	Theatres	
DIY shops		Returning to work	Barbers and Hairdressers	Cinemas	
Gardening centres		Sports shops	Clothing and shoe shops	Gyms	
		Electronic / Phone shops	Dentists	Museums	
		Book shops	Hotels	Shopping centres	
		Furniture & home stores		Traveling abroad	
		Pet shops			
		Banks			
		Using public transport (with limited access)			

Importance of activity determines patience to wait.

Community Health restrictions related to social interactions (e.g. freedom to travel or meet people) are not the most important to people, and as a result are the restrictions people want to happen the soonest.

People understand that returning to work is important, and there is also a strong understanding that certain retail can open with physical distancing in place sooner than others (e.g. DIY shops or Gardening centres).



Source: 1,000 adults surveyed online, representative of the adult population in Ireland.
Fieldwork: 11th May 2020.

Community Health.

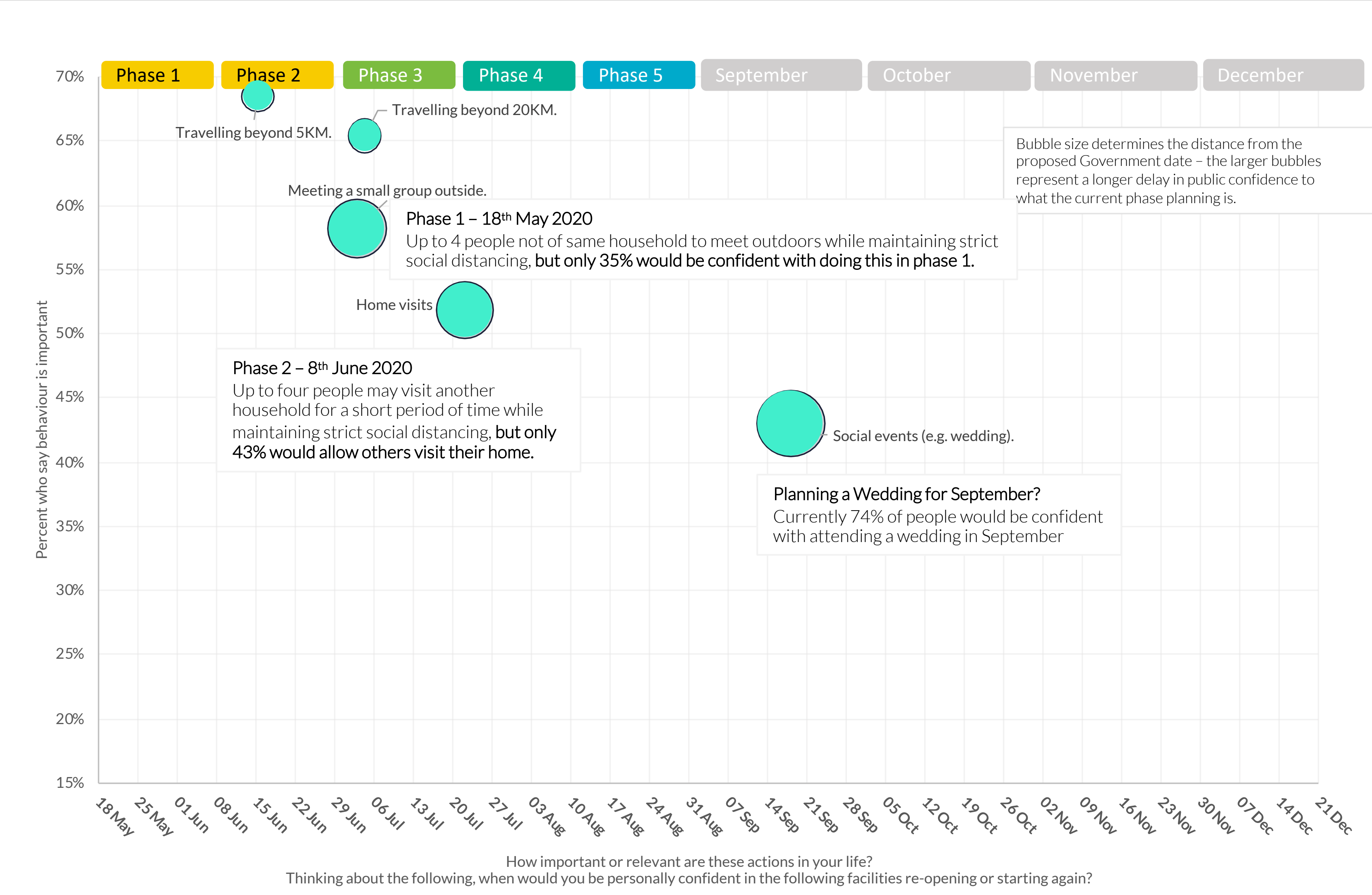
The freedom to be mobile beyond 5km, and subsequently beyond 20km are the highest ranking restriction lifts that people say are important to them personally.

Over 60% of the population say this freedom is important to them and as a result, the average adult would like these restrictions lifted two weeks before the planned date.

However, this does not mean that people are planning to immediately meet other people, as they understand the health implications.

While meeting a small group outside is important to 57% of adults, the average date they would be confident in doing so is 2nd July. This is 6 weeks after the Government is advising that this restriction could be adjusted.

Similarly, people say, on average, they would wait until 22nd July to have a short home visit and confidence in attending social events such as weddings will not happen until 14th September.



Source: 1,000 adults surveyed online, representative of the adult population in Ireland.
Fieldwork: 11th May 2020.

Return to Workplace.

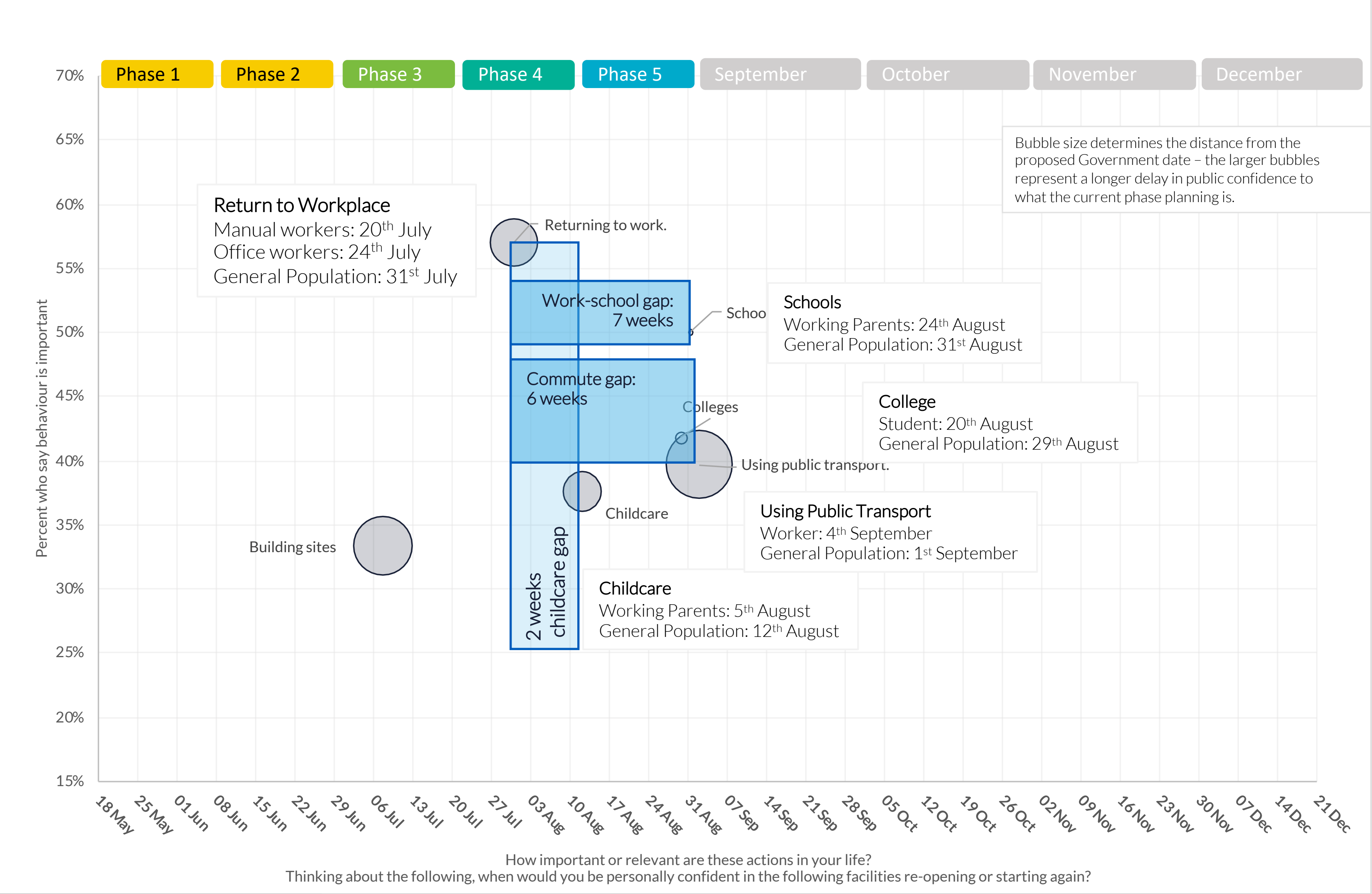
The average date for confidence in returning to the workplace is 31st July. When non-essential retail is due to open in Phase 3, 54% of the population say they would be confident returning to the workplace at this point.

There are also three key tension points to consider:

1. The Commute Gap.
On average, workers are confident to return to the workplace from phase 3, but are not confident about getting public transport until the end of phase 5.

2. The Childcare Gap.
Working parents of pre-schoolers want to return to work also in phase 3, but would not be confident about childcare until after this point.

3. The School-Work Gap.
Similarly, working parents of schoolchildren know schools won't open until September with limited access.



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Fieldwork: 11th May 2020.

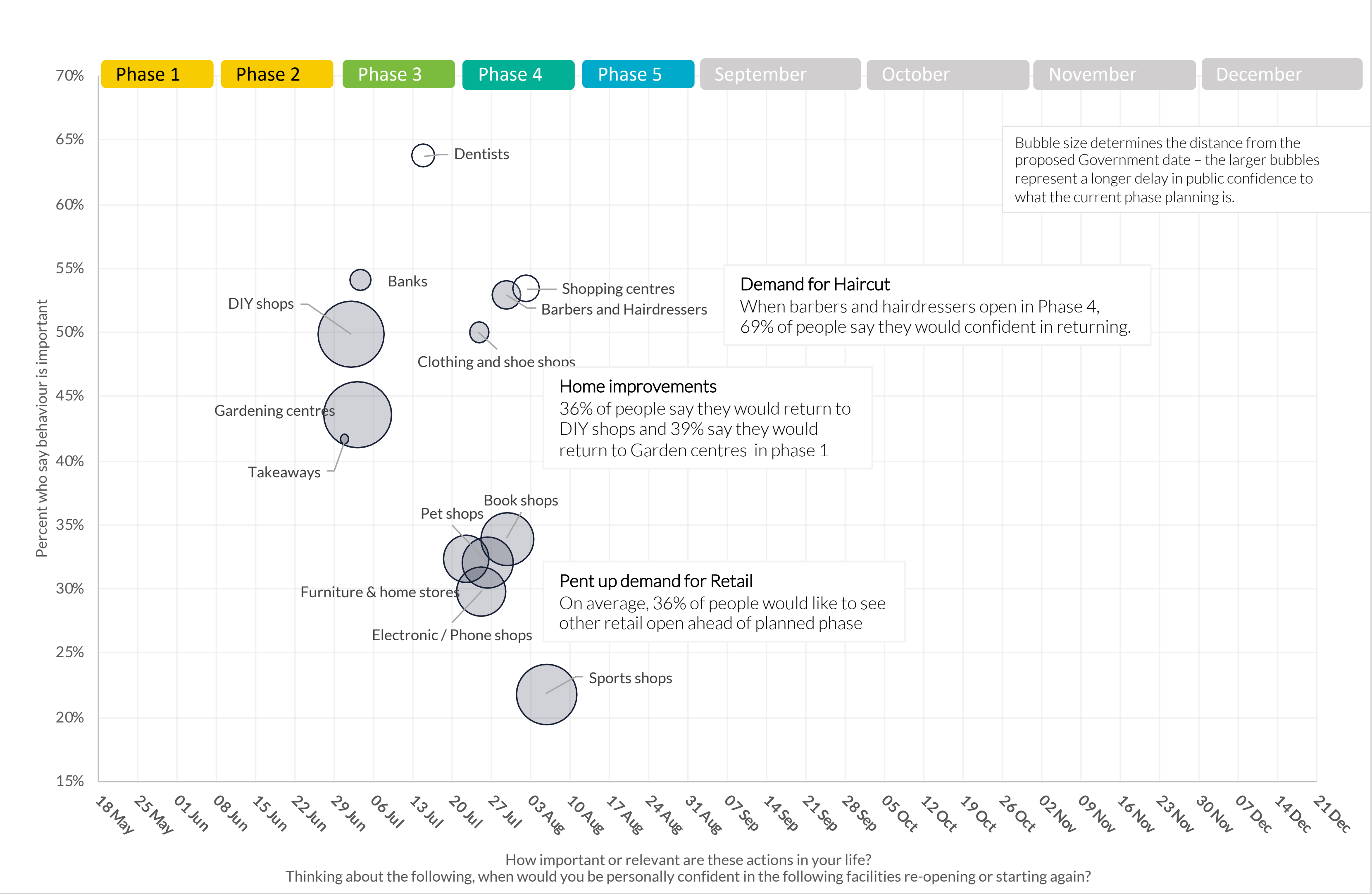
Retail, Services & Commercial.

The phasing of public confidence in returning to retail spaces mirrors the Government's plans, however public confidence will build across the phases.

Initially, between phase 2 and phase 3, the average consumer will be confident to return to banks, DIY shops and Gardening Centres.

While non-essential retail will open in Phase 3, it is not until Phase 4 when the public will be confident returning to clothing shops, pet shops, book shops, furniture and home stores, electronic shops and sports shops.

69% of people agree that barbers and hairdressers should open in Phase 4, and the public would also like to see Shopping centres open before Phase 5.

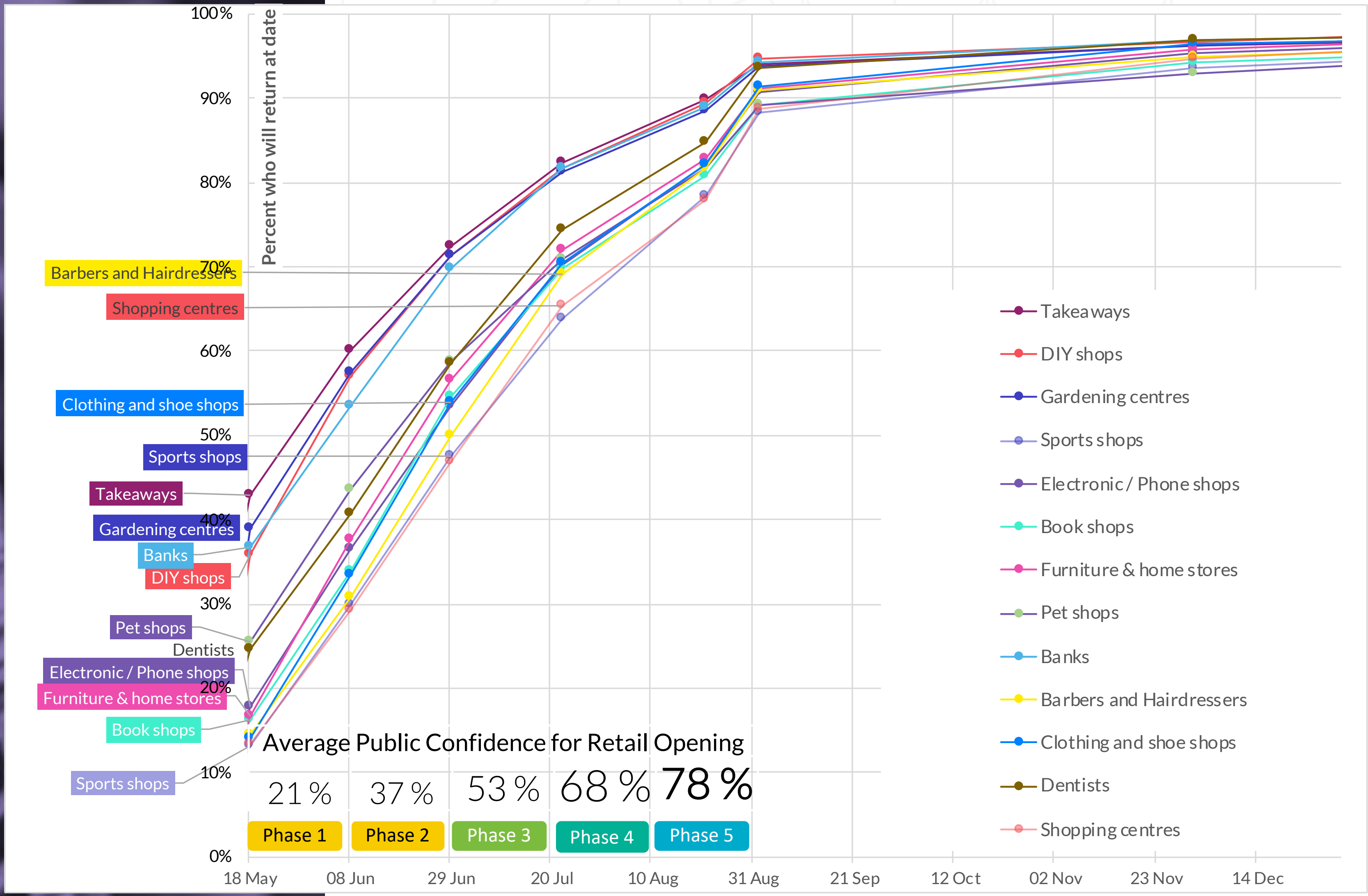


Source: 1,000 adults surveyed online, representative of the adult population in Ireland.
Fieldwork: 11th May 2020.

Retail.

If or when retail re-opens on 18th May (Phase 1), two in five consumers will be confident in returning to these retail spaces. Initially, 36% of adults would have confidence in DIY shops opening in Phase 1, and this confidence increases to 82% of all adults by Phase 4. Similarly, 39% of consumers would be confident about returning to Garden centres in Phase 1.

The average confidence in returning to all retail spaces will increase from 37% in Phase 2 to 53% in phase 3 up to 78% confidence in Phase 5 which is planned for 10th August.



Source: 1,000 adults surveyed online, representative of the adult population in Ireland.
Fieldwork: 11th May 2020.

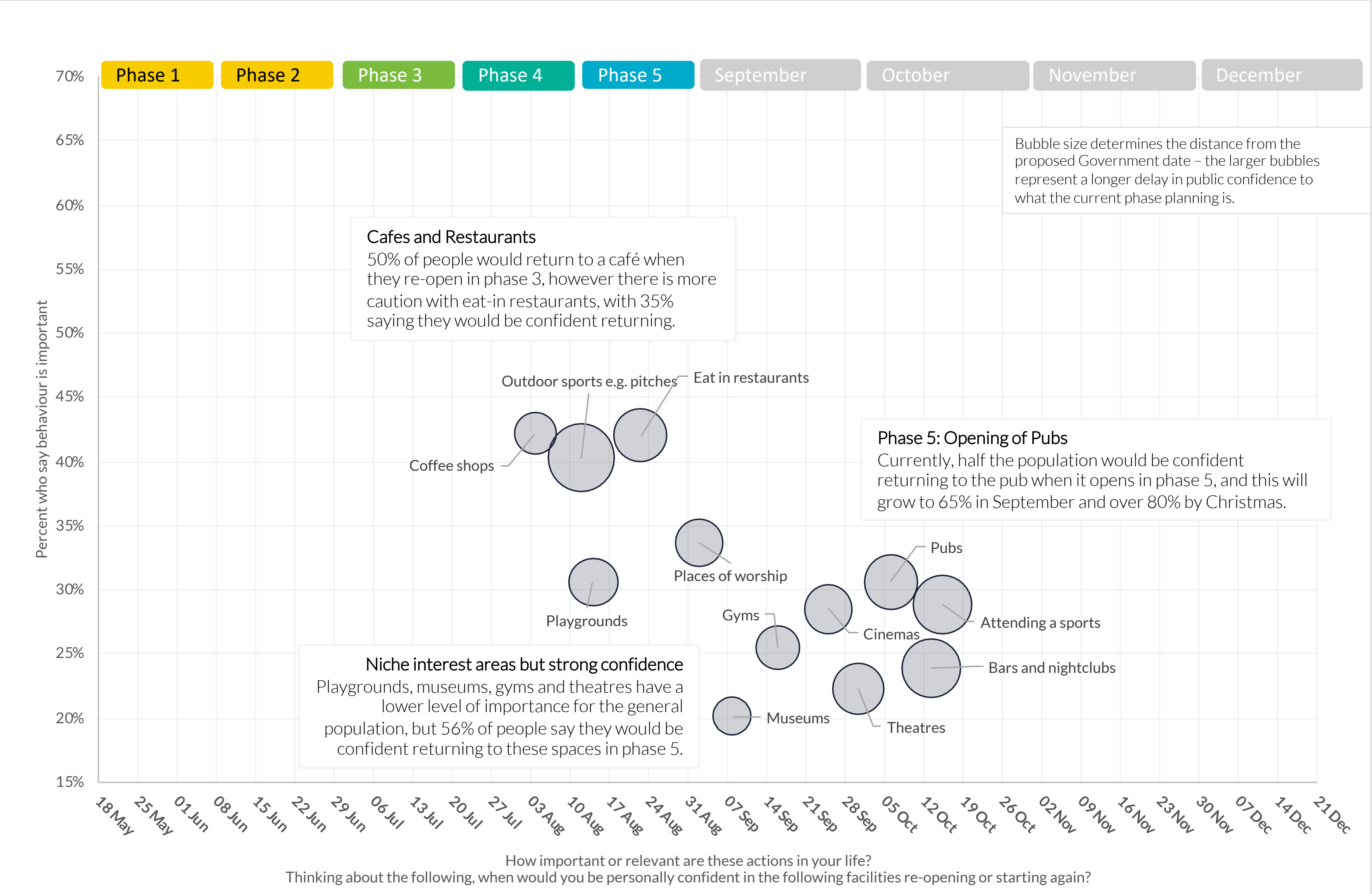
Cultural & Social.

The return to the hospitality and recreation sectors will be slower than retail, however there is a confidence amongst a significant percentage of the population.

There is a higher level of confidence in returning to cafes and restaurants, followed by cultural spaces later in the summer.

When cultural and social spaces open in Phase 5 as currently planned in the Government Roadmap, 57% of people would be confident in returning to these spaces, increasing to 70% of the adult population by the 1st September.

Given the nature of "Social" spaces, key to building this confidence will be demonstrating how other people use the spaces safely.



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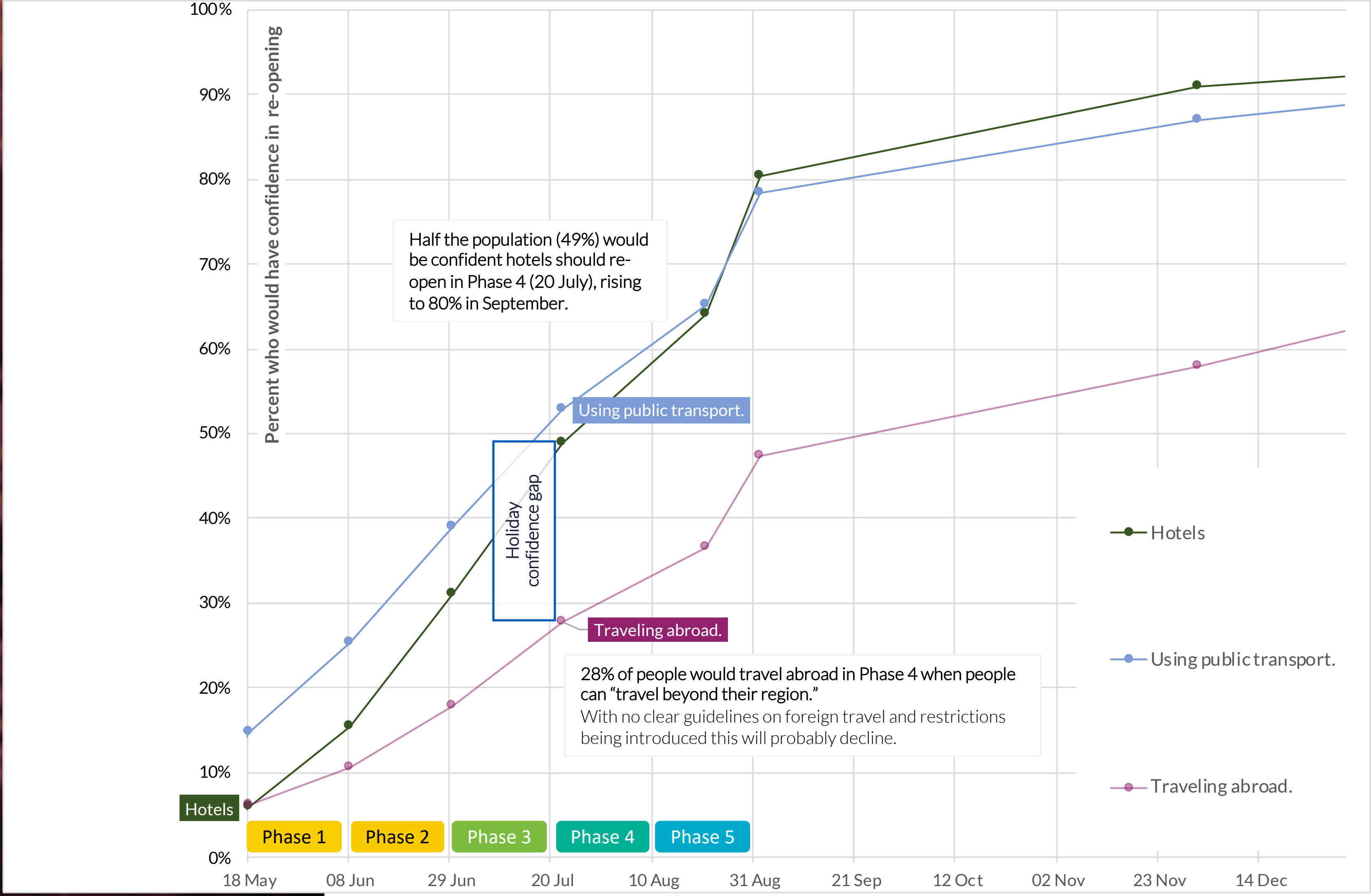
Fieldwork: 11th May 2020.

Travel & Tourism.

In Phase 4, 49% of people would have confidence in hotels re-opening. This is a larger percentage of people (28%) who would be confident in travelling.

As a result, there is possibly a segment of the market who would have (pre-Covid-19) gone on a foreign holiday, but who now would be more confident of staying in a hotel in Ireland.

This "holiday confidence gap" may provide much needed hope for the domestic tourism sector.



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Fieldwork: 11th May 2020.

What to communicate?

Building on this Conditional Confidence

Key to all of this current level of conditional confidence – that is the current perception of returning to the world – is how businesses, public spaces and citizens behave in the coming weeks.

Of course, public health is the key priority, but crucial to consumer demand will be the comfort and confidence of people physically and socially adapting as doors re-open.

Across the summer, there are four key elements to communicate to customers.

Public Health & Safety Measures

Customers are confident in returning to spaces only if they are reassured that businesses are adhering to the highest level of health and safety measures. They expect businesses will do the upmost to protect their staff and their customers.

Expectations of Experience

As daily experiences will be significantly different with physical distancing measures, it will be important to manage customer expectations. Communicating how staff and customers will have to behave in-store, waiting times, or delays will ensure that customers do not feel let down by the experience.

Gratitude for Support

People are keen to support the businesses who have handled the COVID-19 situation in a positive way, however many households have been emotionally and financially impacted. Therefore business needs to show gratitude to customers returning and as importantly to their staff for their efforts.

Non-physical exchanges

A significant number of people will continue to not be confident in returning to physical spaces such as shops, often because they are protecting their household's health. To cater to this group, businesses should continue to communicate distribution channels (e.g. delivery or digital) which reduces the health risks.

About **Core Research**

There is a lot of noise in every market. We exist to navigate this noise. We believe business action should be driven by insight and contextual intelligence.

We work directly and independently with clients across every category and market focusing on business impact.

About **Core**

Core Research is part of Core, Ireland's largest marketing communications company, collaborating across 9 practices, providing services in sponsorship, strategy, research, investment, media, creative, learning, data and recruitment.

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