COVID-19
Barometer

Press Briefing
Rosie Hawkins, Karin van Wouwe, Jane Ostler

April 23, 2020
1 Setting the context
The largest study of its kind exploring the marketing implications of COVID-19

Countries highlighted are shown in this report as we're comparing wave 1-3 data
COVID-19 timeline

Jan. 23
China locks down Wuhan

Jan. 30
New type of pneumonia detected in Wuhan.

Feb. 11
The disease officially named COVID-19.

Feb. 28
Infections in Europe spike.

Mar. 9
Italy goes into lockdown.

Mar. 11
US restricts travel from most of Europe

Mar. 13
Europe has become the epicentre of the pandemic.

Mar. 14
Spain goes into lockdown

Mar. 14-19
Barometer wave 1 in field

Mar. 15
Cases in Africa are on the rise.

Mar. 17
France goes into lockdown

Mar. 18
DOW falls below 20,000 points for first time since 2017.

Mar. 19
UK goes into lockdown

Mar. 20
Germany begins lockdown

Mar. 23
Cases of COVID-19 surpass 600,000

Mar. 25
The death toll in Spain surpassed that of mainland China.

Mar. 26
Total confirmed cases in the US the highest in the world

Mar. 27-30
Barometer wave 2 in field

Mar. 28
A third of the global population is on lockdown

Mar. 29
China begins to lift its lockdown

Mar. 30
The COVID-19 Barometer will continue to provide relevant information as the crisis unfolds to enable brands & companies to react appropriately

Dec. 31
China locks down Wuhan

Jan. 30
Coronavirus declared Public Health Emergency of Int’l Concern

Feb. 11
The disease officially named COVID-19.

Feb. 28
Infections in Europe spike.

Mar. 9
Italy goes into lockdown.

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US restricts travel from most of Europe

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COVID-19 timeline continued

April 1
The number of deaths from COVID-19 globally has more than doubled in the past week.

April 2
Cases of COVID-19 surpass 1 million.

April 3
The global economic impact of the COVID-19 pandemic is estimated to be between $2 trillion and $4 trillion.

April 4

April 5

April 6
U.K. Prime Minister Boris Johnson is moved to intensive care after his COVID-19 symptoms worsen.

April 7
Cases of COVID-19 in Africa surpass 10,000 with over 500 deaths.

April 8
China lifts its lockdown on Wuhan.

April 9
One hundred days have passed since WHO was initially notified of COVID-19 in China, which was then only known as cases of “pneumonia with unknown cause.”

April 10-13
Barometer wave 3 in field

April 10

April 11

April 12

April 13
China has imposed restrictions on the publication of research that focuses on the origins of COVID-19.

April 14
Trump announces he is cutting off the nation’s contributions to the WHO.

April 15
Cases of COVID-19 surpass 2 million.

April 16

April 17
WHO emphasizes that there is no evidence to prove immunity.

April 18

April 19

April 20

April 21

April 22

April 23

April 24-27
Barometer wave 4 in field

April 24

April 25

April 26

April 27

2 Overall feelings and concerns
Levels of concern spiked during the “lockdown shock” at the end of March. As people adjust to their new normal, concern is still high but stable.
Specific concerns about personal health and scarcity have also dialled back as people adjust to their new normal.

**Concern around health**
- I am worried about falling sick no matter how much I take care of myself.
- I am confident that I will stay safe by taking precautions and looking after my hygiene.

**Concern around scarcity**
- I have bought a lot of extra items to be prepared in case I can't get them due to the coronavirus situation.
- I do not see the need to stock up and have not adjusted my shopping behaviour.

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KANTAR
Information needs have evolved – mixed messages and varied government responses are raising questions around use of face masks

- How long does the virus live on surfaces?
- How likely am I to catch the virus?
- What are the symptoms?
- Who is at risk of developing severe illness?
- Should I wear a facemask?
3 Financial concerns
Concerns for the economy continue to grow

It will take a long time for the economy to recover and will have a long term impact in terms of job losses and businesses struggling.

W1: 23% 30% 14% 20% 13%
W2: 28% 31% 13% 17% 11%
W3: 30% 31% 11% 17% 11%

I believe the economy will recover quickly once coronavirus situation has died down.
COVID-19 has impacted or will impact household income for...

71% ...of households
And the reality of that impact is being felt
Resulting in an increased attention to prices and products on sale over time

Wave 1  Wave 2  Wave 3
I pay more attention to prices
44     48     52

Wave 1  Wave 2  Wave 3
I pay more attention to products on sale
35     38     40
### 25-34s are most affected - feeling the immediate impact on household income

#### Impact on household income

<table>
<thead>
<tr>
<th></th>
<th>Already impacted</th>
<th>Expected to impact</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>43</td>
<td>28</td>
<td>71%</td>
</tr>
<tr>
<td>By age</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18-24s</td>
<td>49</td>
<td>26</td>
<td>75%</td>
</tr>
<tr>
<td>25-34s</td>
<td>52</td>
<td>29</td>
<td>81%</td>
</tr>
<tr>
<td>35-54s</td>
<td>47</td>
<td>28</td>
<td>75%</td>
</tr>
<tr>
<td>55+</td>
<td>27</td>
<td>29</td>
<td>56%</td>
</tr>
</tbody>
</table>

Q22. Thinking about your **household** income, that is the income of everyone in your household, which one of these statements comes closest to your current situation? (Wave 2 data)
4
The GenZ and Millennial experience
Level of concern isn’t greater, but their experience is different

Overall level of concern

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>18-24s</th>
<th>25-34s</th>
<th>35-54s</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>GenZ</td>
<td>41</td>
<td>35</td>
<td>39</td>
<td>42</td>
<td>45</td>
</tr>
<tr>
<td>Millennials</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Impact on day to day life

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>18-24s</th>
<th>25-34s</th>
<th>35-54s</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>GenZ</td>
<td>46</td>
<td>48</td>
<td>48</td>
<td>46</td>
<td>43</td>
</tr>
<tr>
<td>Millennials</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Combination of pressures uniquely impacting Millennials

#### What has been hardest to give up?

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>GenZ</th>
<th>Millennials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leaving the house</td>
<td>42</td>
<td>40</td>
<td>38</td>
</tr>
<tr>
<td>Freedom</td>
<td>41</td>
<td>41</td>
<td>40</td>
</tr>
<tr>
<td>Social interaction</td>
<td>40</td>
<td>41</td>
<td>41</td>
</tr>
<tr>
<td>Sense of safety</td>
<td>28</td>
<td>21</td>
<td>28</td>
</tr>
<tr>
<td>Routine</td>
<td>29</td>
<td>26</td>
<td>25</td>
</tr>
<tr>
<td>Big plans</td>
<td>32</td>
<td>26</td>
<td>27</td>
</tr>
<tr>
<td>Children going to school</td>
<td>18</td>
<td>15</td>
<td>20</td>
</tr>
<tr>
<td>Practice sport</td>
<td>16</td>
<td>18</td>
<td>16</td>
</tr>
</tbody>
</table>

Q23. Which of the following have been the hardest to give up because of the effects of the coronavirus?
### Different coping strategies being employed by GenZ and Millennials

<table>
<thead>
<tr>
<th>Activity</th>
<th>Total</th>
<th>GenZ</th>
<th>Millennials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sleeping more</td>
<td>41</td>
<td>53</td>
<td>45</td>
</tr>
<tr>
<td>Exercise more</td>
<td>43</td>
<td>53</td>
<td>48</td>
</tr>
<tr>
<td>Focus on personal development</td>
<td>29</td>
<td>40</td>
<td>38</td>
</tr>
<tr>
<td>Connecting with others</td>
<td>25</td>
<td>29</td>
<td>29</td>
</tr>
<tr>
<td>Get as much sunlight as possible</td>
<td>34</td>
<td>26</td>
<td>29</td>
</tr>
<tr>
<td>Meditate</td>
<td>18</td>
<td>23</td>
<td>22</td>
</tr>
<tr>
<td>Reading</td>
<td>40</td>
<td>35</td>
<td>41</td>
</tr>
<tr>
<td>Avoiding alcohol</td>
<td>21</td>
<td>22</td>
<td>26</td>
</tr>
<tr>
<td>Avoiding the news</td>
<td>17</td>
<td>18</td>
<td>20</td>
</tr>
</tbody>
</table>

Q26. Which of the following are you doing to manage your mental health. % yes (Wave 3 data)
Different coping strategies affecting eating habits

63% of Millennials trying new recipes in lockdown

73% among the 55+

- Total
- GenZ
- Millennials

- Try to follow same eating habits at home
- Try to eat healthier
- Try new recipes
- Snack more
- Treat more
- Care less about my diet
- Rely more on ready made meals

KANTAR
Burger King helping people to recreating their favourite burgers at home

Show how consumers can make the most of these times with small indulgences while they stay safe in their homes
GenZ and Millennial media consumption has increased significantly over the lockdown period

<table>
<thead>
<tr>
<th>Media Type</th>
<th>Total</th>
<th>GenZ</th>
<th>Millennials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet surfing</td>
<td>60</td>
<td>71</td>
<td>71</td>
</tr>
<tr>
<td>TV</td>
<td>53</td>
<td>58</td>
<td>53</td>
</tr>
<tr>
<td>Instant messaging</td>
<td>52</td>
<td>62</td>
<td>64</td>
</tr>
<tr>
<td>Social networks</td>
<td>52</td>
<td>68</td>
<td>68</td>
</tr>
<tr>
<td>Websites</td>
<td>52</td>
<td>63</td>
<td>66</td>
</tr>
<tr>
<td>Online videos</td>
<td>52</td>
<td>72</td>
<td>69</td>
</tr>
<tr>
<td>E-mail</td>
<td>47</td>
<td>49</td>
<td>50</td>
</tr>
<tr>
<td>TV on demand/Streming</td>
<td>46</td>
<td>58</td>
<td>61</td>
</tr>
<tr>
<td>Listening to podcasts/streams/streaming music</td>
<td>31</td>
<td>50</td>
<td>48</td>
</tr>
</tbody>
</table>

Q10. In general, how has the coronavirus situation impacted your use of media? With reference to the last month, are you using the following media more or less compared to last month % more
YouTube usage has increased considerably

Q11. Thinking about social networks and instant messaging systems, how has your use changed, in comparison to last month? %more
Instagram Live usage jumped 70% last month. A psychologist says it's because 'people are not designed to be isolated.'
Online platforms are trusted more by GenZ and Millennials

Q14. What are your most trusted sources of information about Coronavirus? (Wave 3 data)
5
Expectations from brands
The way GenZ and Millennials deal with the situation is quite different from the rest, showing a more proactive attitude
And specifically GenZ expect more from companies to make donations for hospitals and scientific research

What should companies do at the moment...

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>GenZ</th>
<th>Millennials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worry about their employees’ health, sanitizing workplaces</td>
<td>77</td>
<td>73</td>
<td>72</td>
</tr>
<tr>
<td>Favour flexible working</td>
<td>59</td>
<td>53</td>
<td>56</td>
</tr>
<tr>
<td>Make donations to support purchase of masks and sanitizers for hospitals</td>
<td>44</td>
<td>50</td>
<td>46</td>
</tr>
<tr>
<td>Have plans in place to protect the supply of services or products to consumers</td>
<td>45</td>
<td>38</td>
<td>42</td>
</tr>
<tr>
<td>Make themselves available to the government to understand how they can be helpful</td>
<td>37</td>
<td>37</td>
<td>36</td>
</tr>
<tr>
<td>Help their consumers by offering discounts and promotions</td>
<td>38</td>
<td>36</td>
<td>39</td>
</tr>
<tr>
<td>Make donations to support scientific research</td>
<td>32</td>
<td>39</td>
<td>33</td>
</tr>
<tr>
<td>Foster the use of digital communication tools at work</td>
<td>34</td>
<td>32</td>
<td>36</td>
</tr>
<tr>
<td>Encourage people to take annual leave</td>
<td>18</td>
<td>18</td>
<td>21</td>
</tr>
<tr>
<td>Bring all their production and factories to [this country]</td>
<td>22</td>
<td>11</td>
<td>17</td>
</tr>
<tr>
<td>Set up call centers to answer consumers’ questions</td>
<td>16</td>
<td>17</td>
<td>18</td>
</tr>
<tr>
<td>Stop advertising</td>
<td>6</td>
<td>6</td>
<td>6</td>
</tr>
</tbody>
</table>
30+ Fashion Brands Pivoting To Make Stylish Coronavirus Masks

Kristen Philipkoski Contributor @
Style & Beauty
I cover the new luxury in fashion, design and lifestyle.

STANDARD BANK ANNOUNCES PAYMENT HOLIDAY FOR CLIENTS

The bank makes the announcement amid growing calls for consumer reprieve as the country grapples with the spread of COVID-19.
Millennials also expect brands to take this proactive attitude and be the change

What should brands do at the moment…
Expectations from advertising
Advertising too, should be useful, positive and consistent with your values but don’t just drive your usual messages

<table>
<thead>
<tr>
<th></th>
<th>78%</th>
<th>76%</th>
<th>72%</th>
<th>65%</th>
<th>47%</th>
<th>70%</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Should</strong></td>
<td>Show how they can be <strong>helpful</strong> in the new everyday life</td>
<td>Inform about their efforts to face the situation</td>
<td>Use a <strong>reassuring</strong> tone</td>
<td>Should communicate brand values</td>
<td>Should talk about brands like they have always done</td>
<td>Should offer a <strong>positive</strong> perspective</td>
</tr>
<tr>
<td><strong>Should not</strong></td>
<td><strong>69%</strong> exploit coronavirus to promote a brand</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Advertising also adds colour to channels like TV that consumers are engaging with more since the start of the pandemic. It is a welcome distraction, reminding most of more normal times.

<table>
<thead>
<tr>
<th>Smiley</th>
<th>TV</th>
<th>Gas Mask</th>
<th>Fist</th>
<th>Cash</th>
<th>Graph</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;The ad took my mind off my worries while watching it.&quot;</td>
<td>&quot;People need a diversion from what is going on. More people are watching tv.&quot;</td>
<td>&quot;At times like these, normalcy is key to not going crazy or over worrying.&quot;</td>
<td>&quot;Businesses are fighting for survival. That means they are also fighting for jobs and a healthier economy. Why would you not advertise?&quot;</td>
<td>&quot;We all need to buy things and we need reminders that life will eventually get back to normal.&quot;</td>
<td>&quot;Because even though we are social distancing we must still be able to see ads for products so some parts of the economy can go on. There is also an entertainment factor to ads.&quot;</td>
</tr>
</tbody>
</table>
Brands should be mindful of their approach. Above all, they need to be authentic; this is not a time for empty gestures.

Recognizing car payments are a significant financial load for consumers, Ford launched two new ads around its initiative to provide 6 months of payment relief for affected customers, with taglines like “Built to Lend a Hand” and “Built for Right Now”. Hyundai and Toyota followed suit.

McDonald’s social media campaign showed the iconic Golden Arches pulled apart to encourage social distancing. However, it drew criticism (even from presidential candidate Bernie Sanders) as an opportunistic move, with many questioning how the brand treats its workers.
And when it comes to humour in advertising views are polarising, but ultimately it’s about staying true to your brand.

38% of people feel humour is inappropriate in advertising at this time.

24% of people disagree however.
Using humour: example of Edeka COVID-19 ad and innocent smoothies

Helping in everyday situations

“Fits perfectly with what I think about Edeka in a positive sense and with the current situation”

Edeka, Germany

Innocent Smoothies is a great example of a brand which typically uses humour in its communications, staying true to their brand values

Power Contribution Score 93

Edeka, Germany

Fits perfectly with what I think about Edeka in a positive sense and with the current situation

93 Power Contribution Score

KANTAR

Brand Power Contribution Score: Aggregate Index (Meaningful, Different & Salient) shown as percentile value 0-100

Case studies of COVID-19 advertisement tested by Kantar via LinkNow in Germany and UK
In most cases brands can and should continue to advertise, but remember to keep true to yourself. Also – ads do not need to reference the virus.

When considering to advertise keep in mind:

- Seeing ads can help people mentally escape from the crisis
- Keep advertisement in line with your brand values
- Your advertising may still work but our data suggests people would appreciate a change from the normal run

But... do not:

- Exploit the coronacrisis to your own benefit

Based on 10 ads parallel tested, we found:

- Probability of short term sales (STSL)
  - 76% Before COVID-19
  - 71% During COVID-19

- Strength of contribution to long-term equity (Power)
  - 71 Before COVID-19
  - 68 During COVID-19

Kantar Link parallel study – USA/UK/Brazil/France/Germany (n=1,500)
As the apps increase their reach, planning for the contextual differences is key - you can’t assume all ads will perform equally well in all digital formats

Source: Kantar

<table>
<thead>
<tr>
<th></th>
<th>Pre Roll Context</th>
<th>Social Context</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact (Percentile)</td>
<td>77</td>
<td>57</td>
</tr>
<tr>
<td>Played whole ad</td>
<td>63%</td>
<td>24%</td>
</tr>
<tr>
<td>Average of ad viewed</td>
<td>73%</td>
<td>32%</td>
</tr>
<tr>
<td></td>
<td>23 sec</td>
<td>10 sec</td>
</tr>
</tbody>
</table>

Smart For Four “Reverse Parking”

UK
Summary and call to action
GenZ and Millennials

The GenZ and Millennial experience

Harder hit in financial terms – feeling the immediate impact and more worried for the future

They both feel the impact on their day-to-day lives and miss social interaction. But their coping strategies suggest different motivations. GenZ is focused on alleviating boredom. Millennials experience a higher level of anxiety and focus more on stress management.

Media and advertising opportunities

As we see the usage of popular communication and social apps increase, there are more opportunities to communicate brand values on these platforms. And people are open to (seeing relevant) advertising.

Content needs to be tailored to the platform context. And spikes in social media platform usage create opportunities to adapt your media strategy to maximise efficiencies (increasing impact with no additional cost).

The role for brands

There’s a role for brands to play, but it needs to be practical, substantial and positive.

GenZ expect brands to step and contribute to the worldwide efforts to overcome this crisis. Millennials are more focused on what brands can do to help consumers in practical ways.