



**KANTAR**

# COVID-19: Barometer

Consumer Evolution and Brand  
Implications

United States and Canada

Wave 1

# Methodology and Fundamentals

## Study Details

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### 10 Minute Questionnaire

Consumer attitudes

Media habits

Travel habits

Impact on purchase  
behaviour

Expectations from brands

## Field Timing

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### Wave 1

Online fieldwork

March 15-18<sup>th</sup>

## Markets

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United States and Canada\*

## Audience

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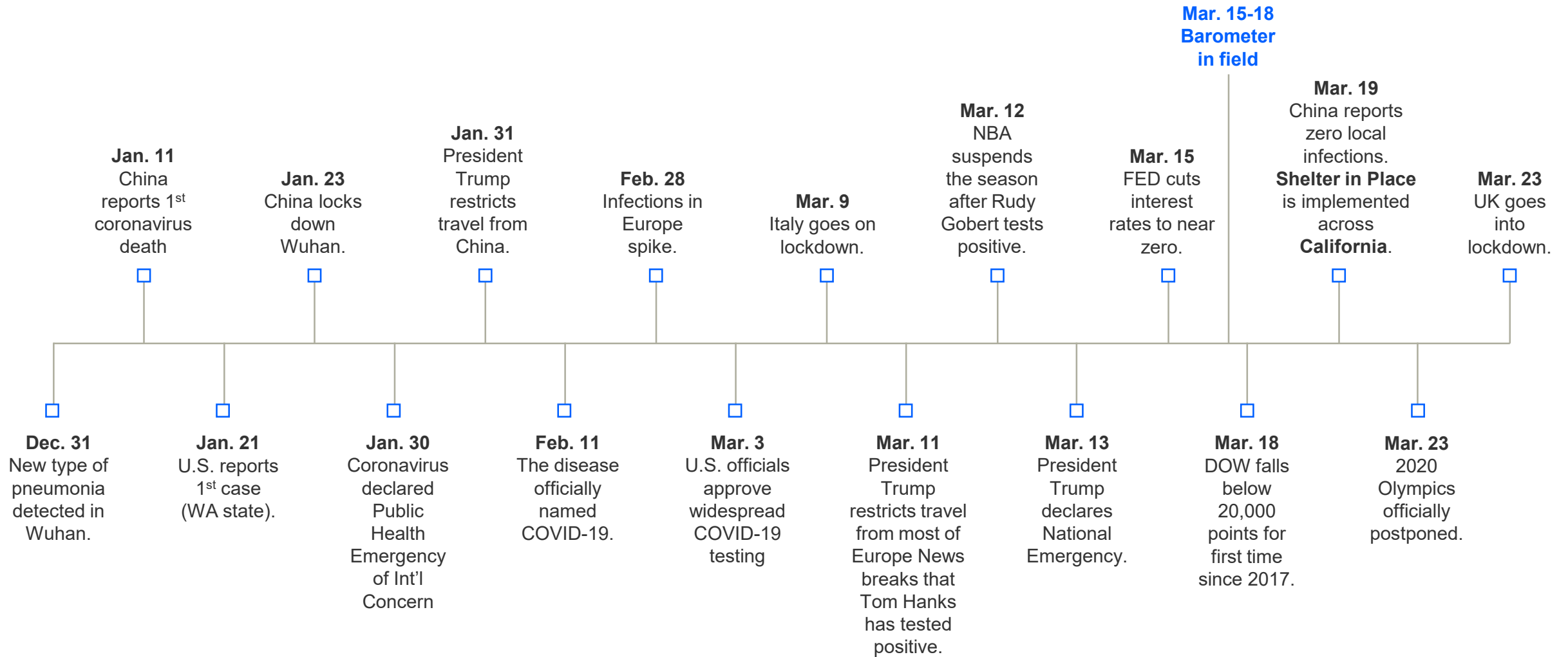
Nationally Representative

Age

Gender

Region

# COVID-19 Timeline

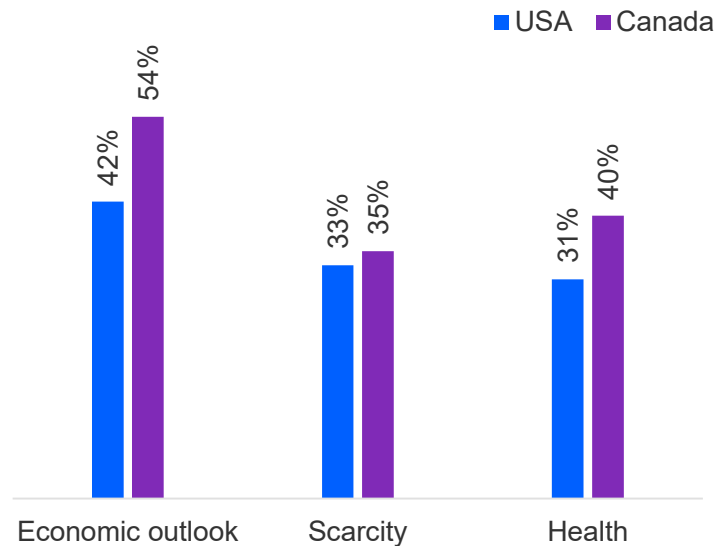


**Overall, consumers are concerned about Coronavirus and its implications, but their behavior was not changing as quickly as sentiment. Canadians are currently feeling more impact than the US.**

### Concern about Coronavirus situation

	USA	Canada
Hugely	24%	35%
	34%	38%
	12%	10%
	21%	12%
Not at all	10%	6%

### Feeling Concerned about...



### Changing behavior

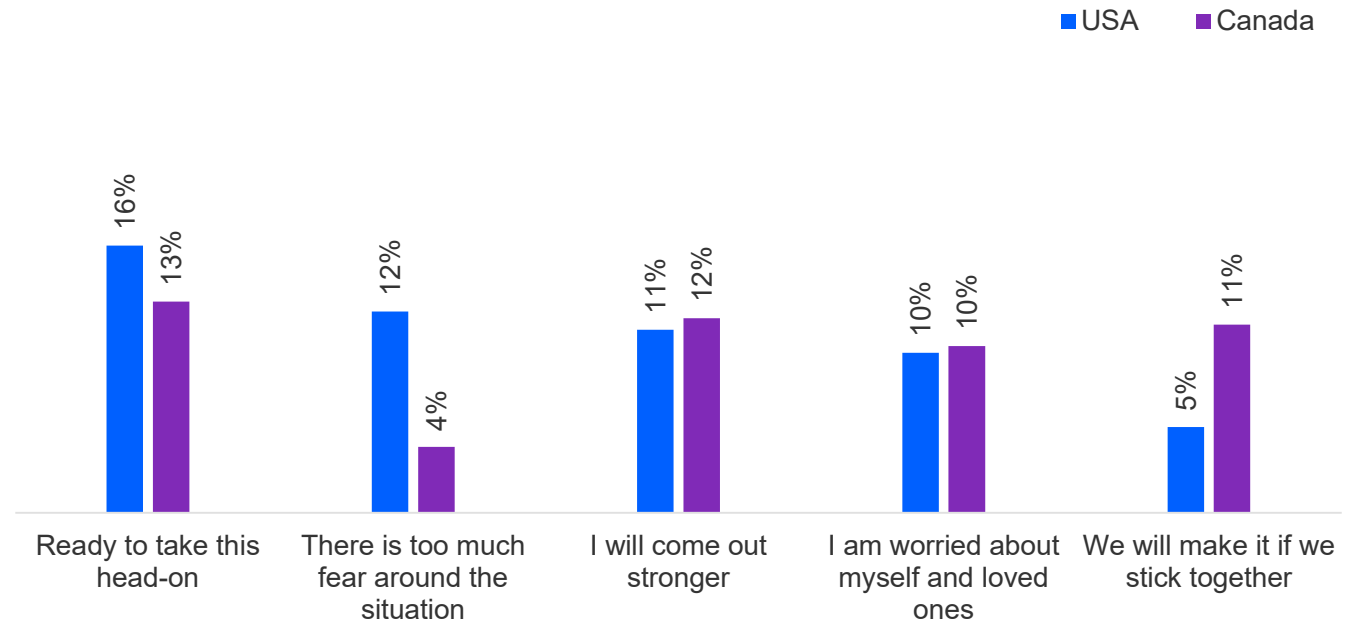


### IMPLICATIONS:

Behavior and concern are only going to continue to change given the rapid intensification of the situation in North America. At this point in time, less than half of Americans were experiencing disruption. Financial plans are evolving, and this will have an impact on shopping and brand choice behavior. As people try to reduce risk, common in times of uncertainty, we may see tried and trusted brands, or brands with broader presence, gaining share as people consolidate repertoires.

# The #1 priority for consumers right now is being prepared and informed.

Being prepared and informed is the most important thing for consumers right now



## IMPLICATIONS:

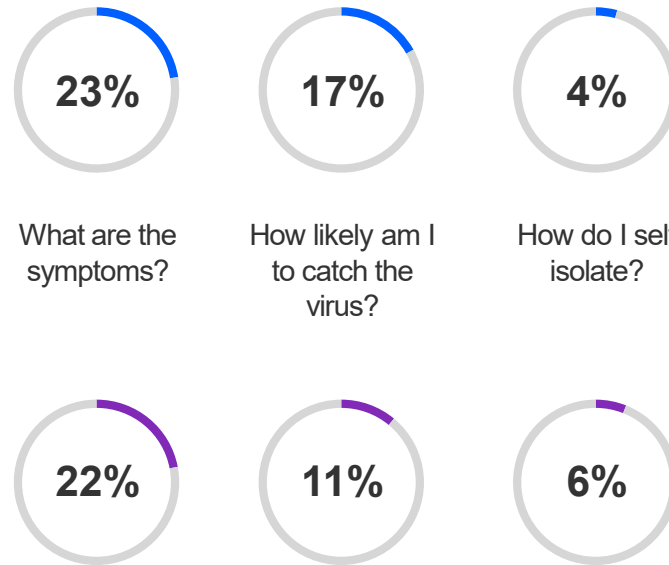
All organizations have a role to play in keeping people informed. In what they are doing during this crisis, with links to material to help ensure knowledge is readily available, in helping to give people planning tools so they feel prepared. Brands that are reacting quickly to prepare communities, like supermarkets opening early just for older people, are benefiting from positive sentiment.

# Given the desire to be prepared, consumers are actively seeking information related to symptoms and prevention.

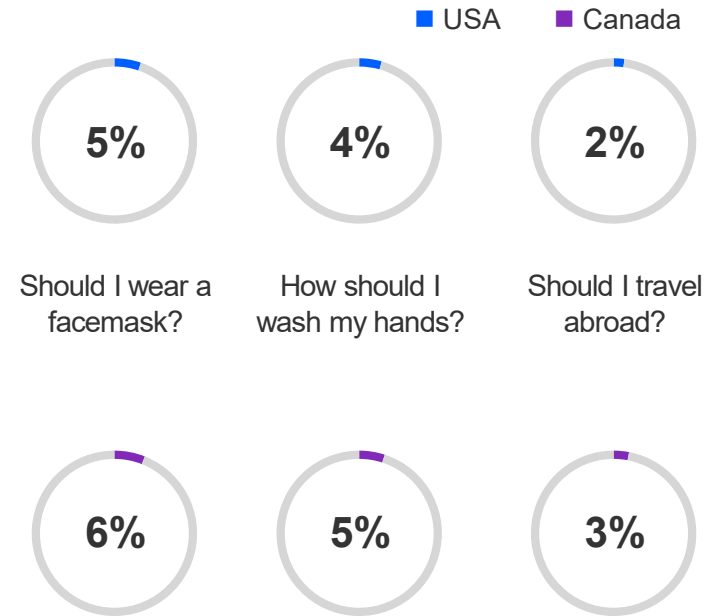
## Prevention



## Diagnosis



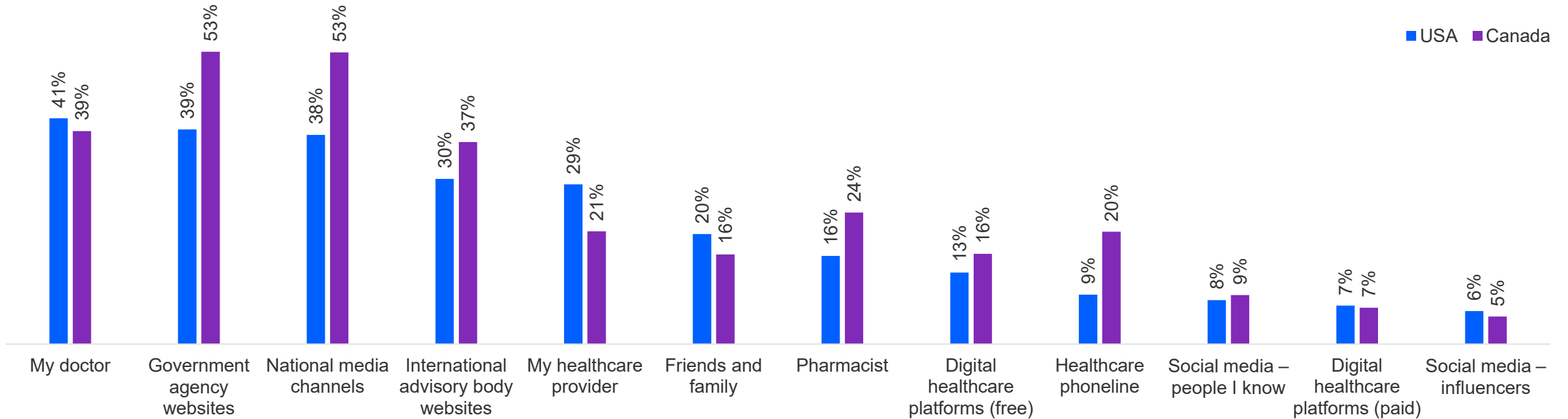
## Behaviors



### IMPLICATIONS:

Communication contradicting recommended behaviors (social-distancing) during the pandemic should be suspended. Any ability to continually underscore the right, validated information, is important to all people.

And they are mainly looking to experts, like doctors or the government, as trusted sources of this information. In Canada, there is more trust in both the government and media than the US.

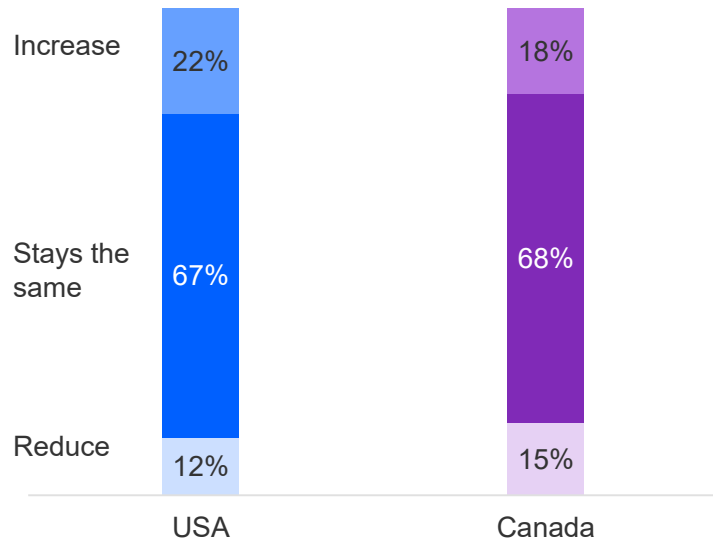


**IMPLICATIONS:**

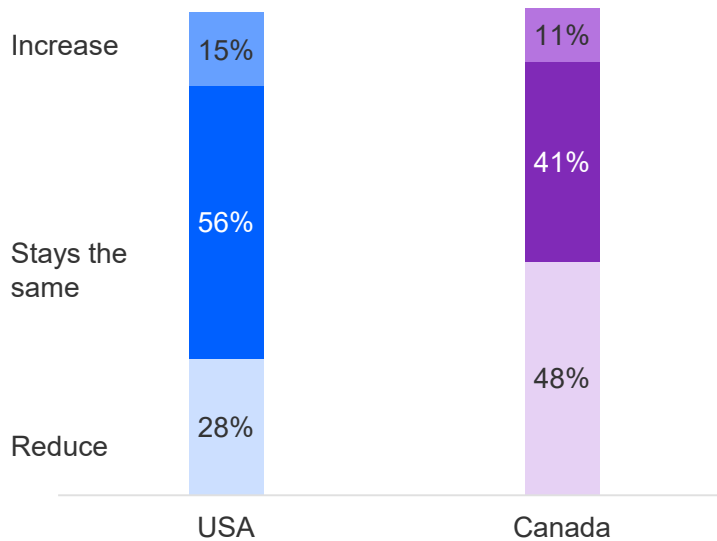
However, the communication of information is ideally left in the hands of the experts. The role of organizations is to amplify the message, not necessarily create the message.

**While consumers are taking measures to stay informed, majority were maintaining purchase behavior at the time of fielding. However, online purchases will likely be on the rise.**

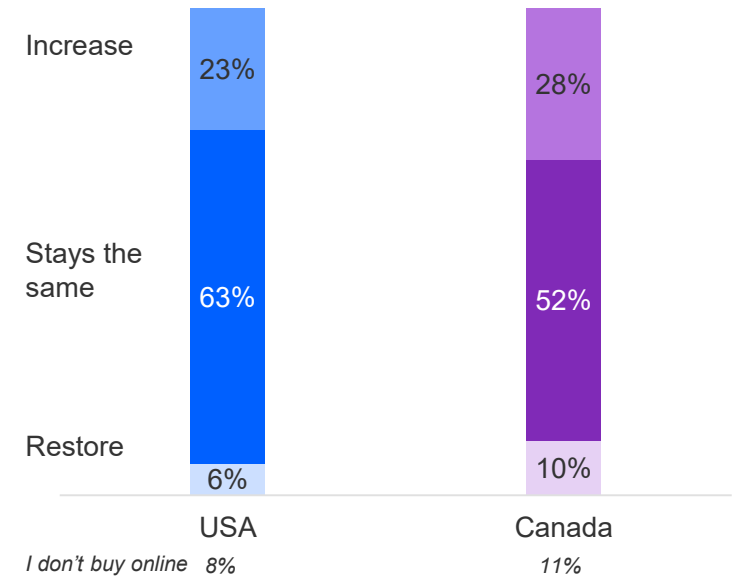
**At e-commerce websites**



**At physical outlets**



**I think future online purchases will...**



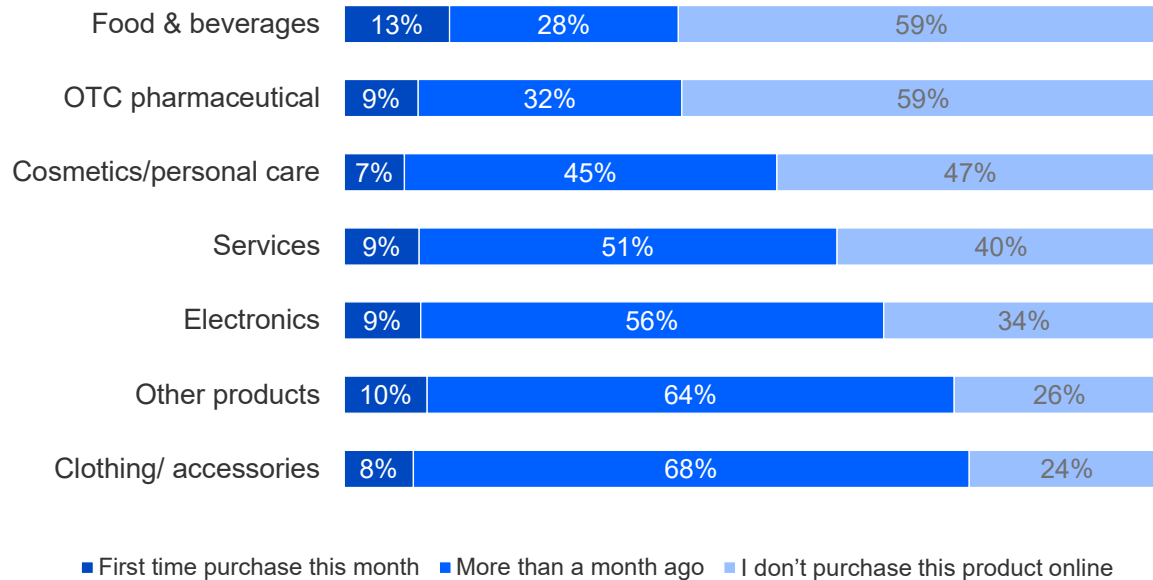
**IMPLICATIONS:**

Stockpiling is likely to increase as states close down and shelter in place orders are announced. Reassurance of availability is critical, especially for online purchases. Utilizing online shopping in place of in store will be critical for consumers who are staying home and for retailers that are forced to close. Emerging concerns that online channels will be overloaded are evident. Communication on support/development of this channel may help put people at ease

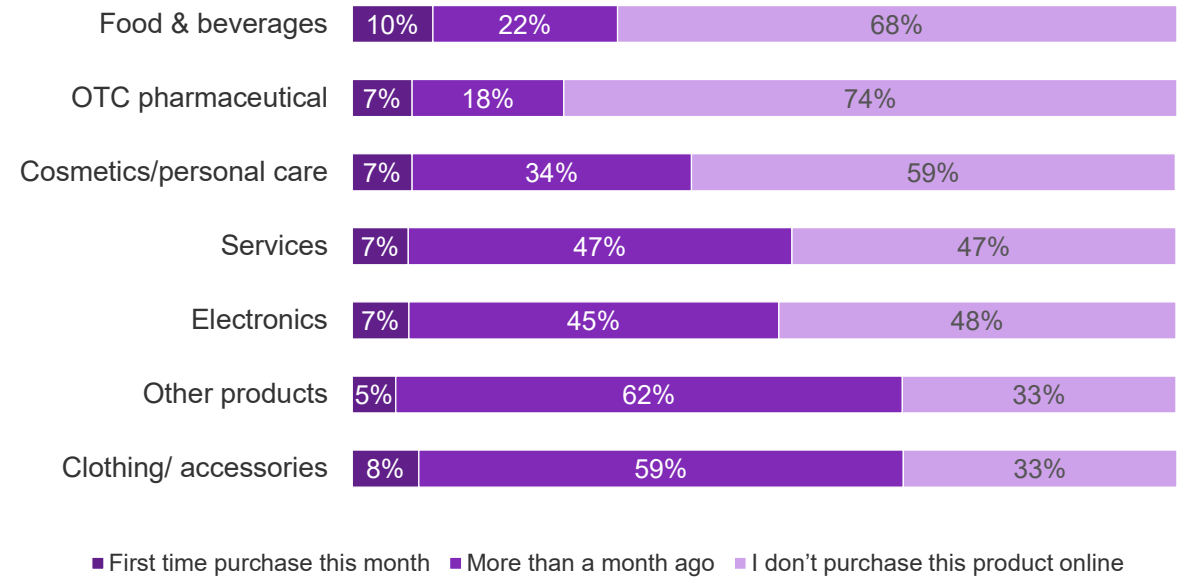


# Online purchase is already high for many categories. However, essentials like food/beverage and pharmaceuticals have lowest penetration.

## USA



## Canada

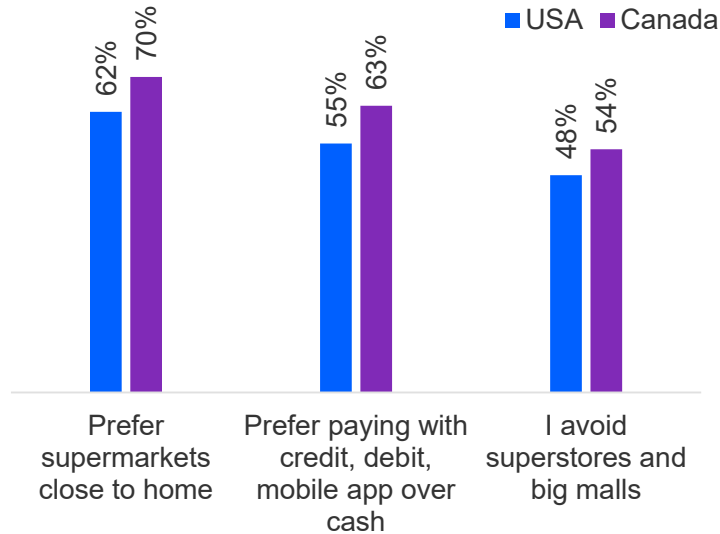


## IMPLICATIONS:

Promotions and deals will likely be an enhanced trigger for consideration, especially online. Online purchase of food/beverage and pharmaceuticals are expected to rise as consumers avoid large crowds but need these supplies in their daily life.

# During this period of uncertainty, consumers are sticking with what they know and preparing how they can.

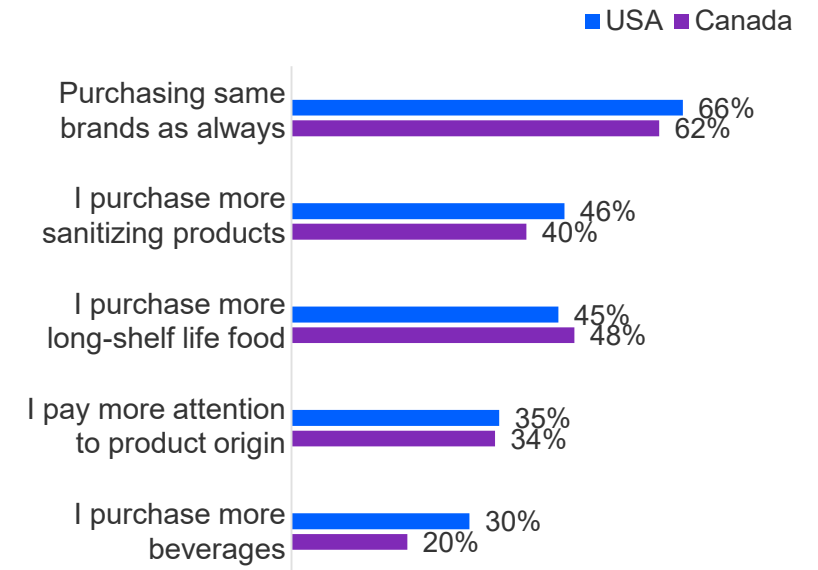
## Impact on shopping behavior



## Price sensitivity



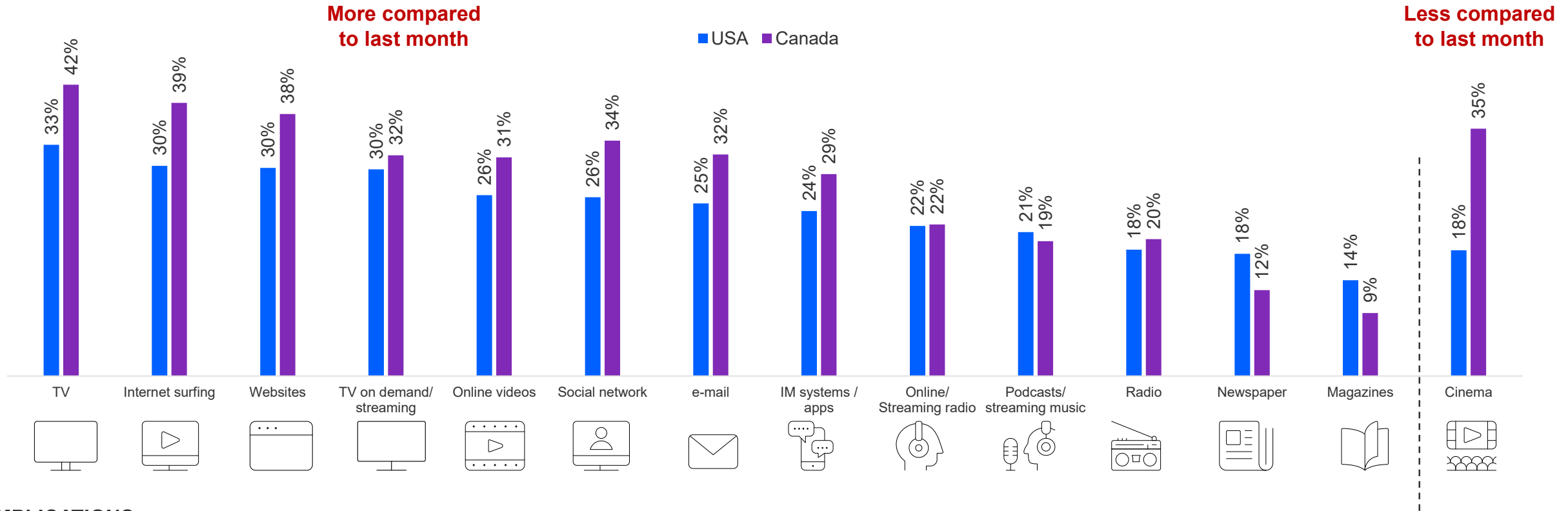
## Purchase decisions



### IMPLICATIONS:

Maintaining saliency is important in a time when consumers are choosing trusted brands and paying attention to price. Marketing efforts need to be seen as supportive and not opportunistic, but people still want to hear from their brands, know the organizations that produce them are still there, and will continue to use information to optimize their purchases.

# Media that can be consumed at home has increased because of the more people self-isolating at the time of field, and this is likely to increase.

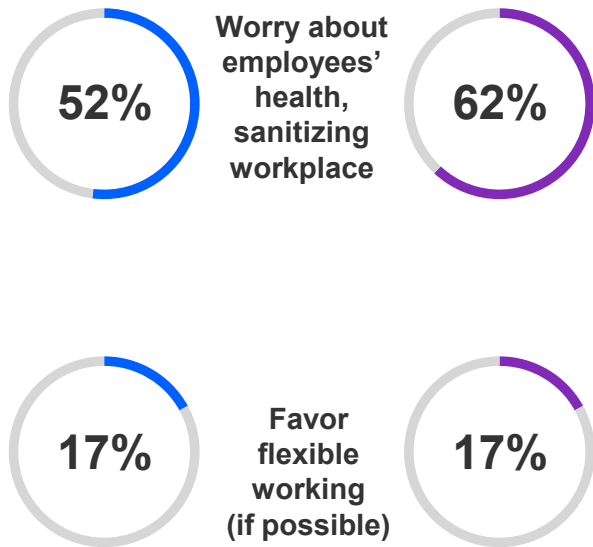


## IMPLICATIONS:

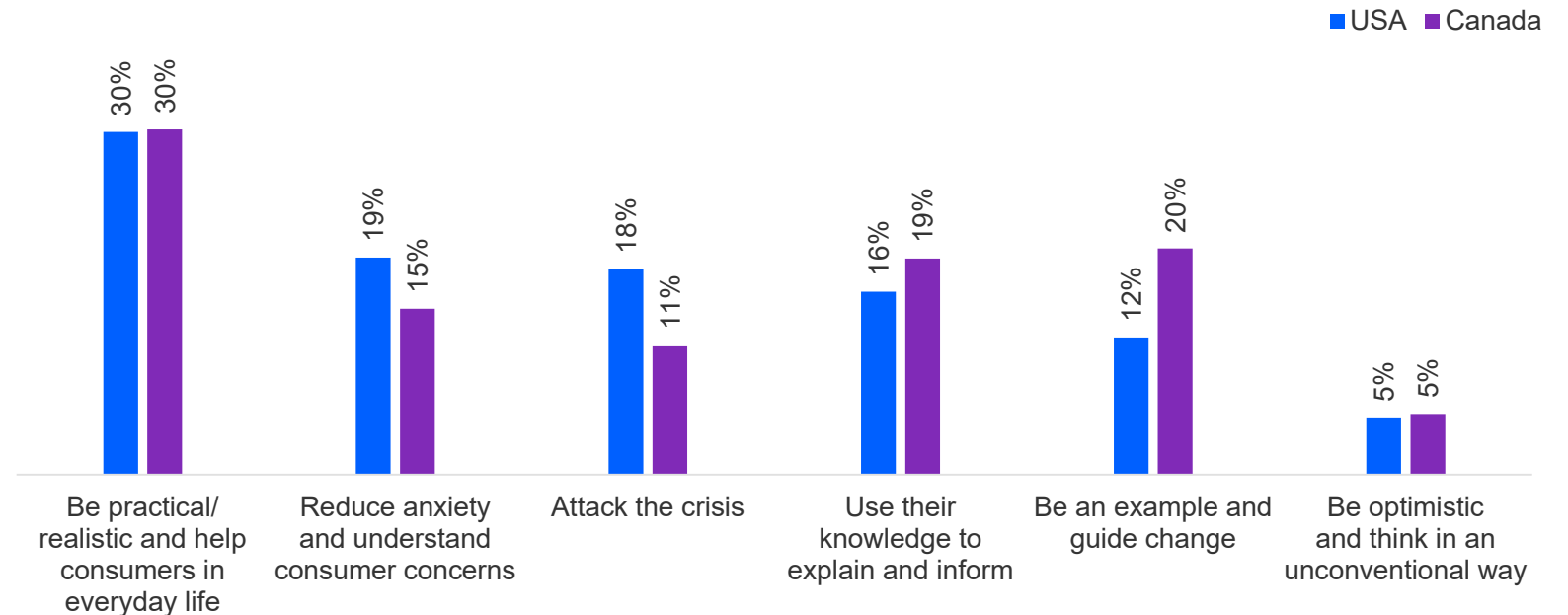
Increases in tv and internet usage, unsurprisingly, provided people are staying at home. Media consumption will continue to rise, and there is therefore opportunity to create sympathetic, helpful interactions. With online shopping increasing, as well as people looking for better prices online, promotional efforts in a digital context may be helpful for brands and consumers.

# Although the number one thing companies should be doing right now is ensuring employee safety, brands still have a role to play with consumers.

## In this moment, companies should...



## In this moment, brands should...

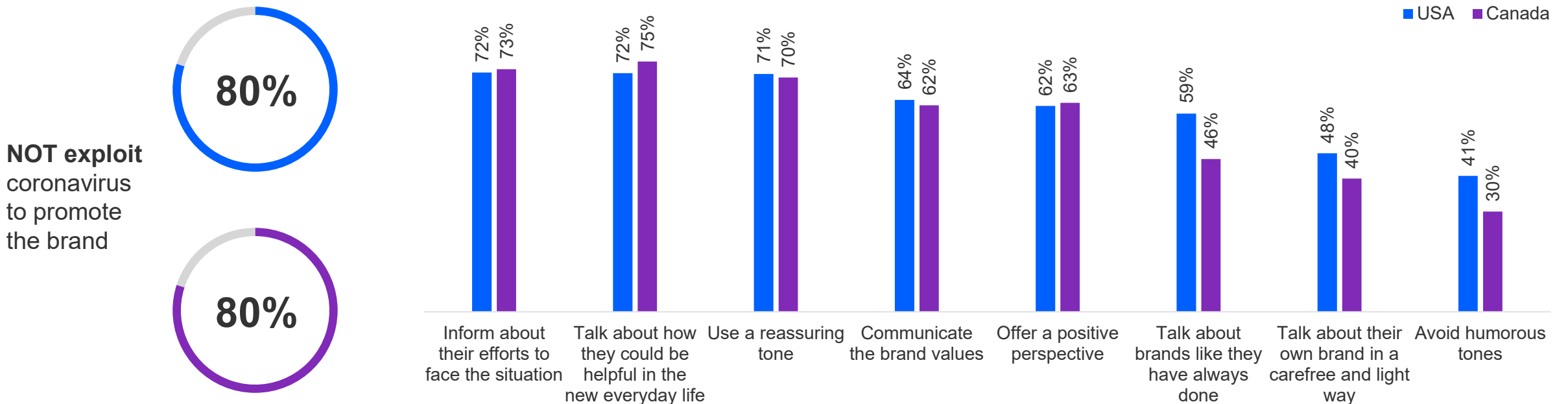


### IMPLICATIONS:

Reassurance about measures being taken for employees could help build a sense of care for the community. Additionally, brands with a clear message on the role they can play in aiding everyday life will build affinity. Again, going dark may not be best as this does not reassure people that the brand is healthy and their people are safe. Brand voices still need to be heard, there are just different stories they need to tell right now.

However, there is a fine line to walk for anything brands are communicating in the short term.

## Advertisers should...



**NOT exploit** coronavirus to promote the brand

80%

80%

### IMPLICATIONS:

Brands need to be reassuring/ positive during this time, but humor is not necessarily the best route to do so given overall sentiment and concerns. Most important is to constantly communicate what brands are doing to help.

# Takeaways

1.

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In a time of uncertainty and concern, **people are looking for reassurance**, and brands can offer a level of consistency with consumers looking to the brands they trust.

**Projecting a consistent and recognizable persona** can offer comfort and make it easier for consumers to relate to your brand.

2.

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As consumer behaviors shift, adapt to their changing behaviors in the short term – **emphasize accessibility, convenience** and ensure ability to purchase/interact online given likely decline in shopping in store.

3.

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While consumers are exuding a level of price sensitivity, this is likely temporary, so brands need to **continue to plan for the long-term** i.e. remind people why they should choose you, now and always, even if your products are currently out of stock or doors are temporarily closed.

4.

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Brands that maintain media presence are likely to recover more quickly once the crisis is over.

However, **care needs to be taken to not exploit consumer needs** during the coronavirus situation and to ensure tone is sensitive to practical and emotional needs during this time.



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