

**NOW > NEXT**

**REIMAGINE > REFRAME**

*A perspective on driving relevance  
and growth as Ireland learns to live  
with Covid-19*

May 2020

[www.genesis.ie](http://www.genesis.ie)

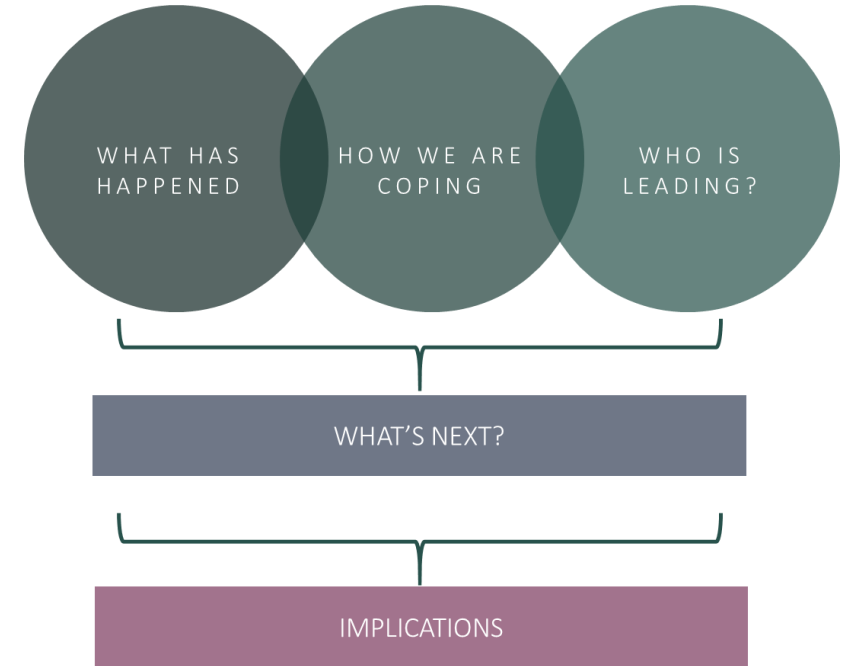


# Now > Next: Report Overview

## REPORT CONTEXT:

- Ireland is moving from the initial firefighting phase of Covid-19 towards a planned programme of managing the country until a vaccine or treatment is found. Our analysis takes stock of the impact of the crisis on Irish people and the national mood.
- We assess the field of play now and gaze forward to consider how things are likely to develop. We explore the potential implications for individuals, organisations, brands and decision makers.
- The foundational material for this study is a nationally representative survey of 1,008 Irish adults, conducted online at the end of April 2020.
- Our analysis of the survey data has enabled Genesis to create some provocations and identify key dilemmas. These are likely to create tensions which need to be monitored and navigated by decision-makers in business and government over the coming months.

## REPORT STRUCTURE:





## NOW >

We're all in this together, but we're all experiencing very different impacts and consequences.

# Now > WHAT HAS HAPPENED?

## SUMMARY:

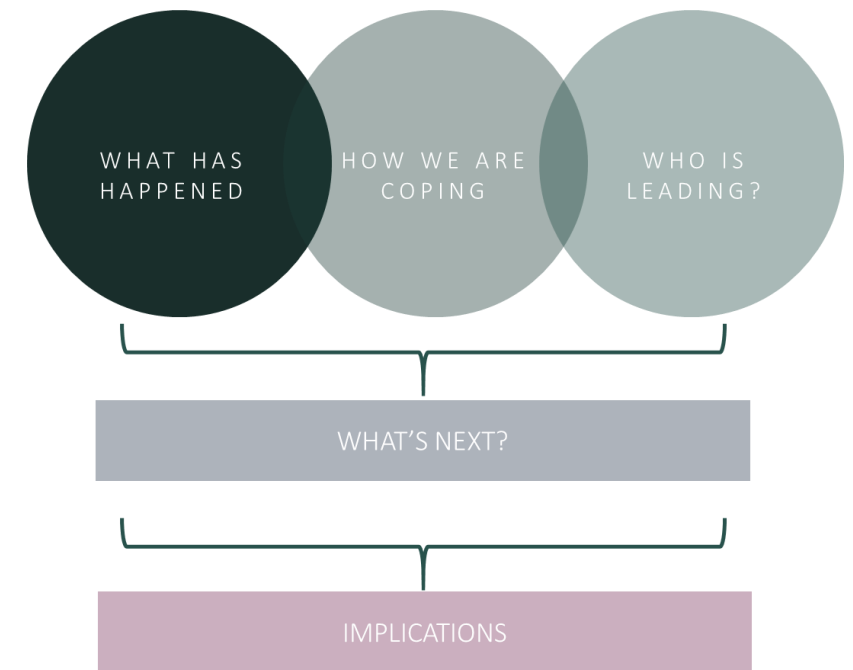
The impacts of Covid-19 have been fast and significant. Although everyone is being impacted, everyone's experience is not the same:

- A large frontline cohort have an active role to play in the battle against Covid-19, whereas another large cohort have a passive role to play by remaining in lockdown.
- There are those who are taking the first wave of economic impacts squarely on the chin, and there is an equally large portion of the population that is currently unaffected.
- From a health perspective, most people are more concerned about others contracting Covid-19 than they are of catching it themselves.

Emotionally, everyone has been significantly impacted. In a short period of time a positive and buoyant collective psychology has turned into a significantly more negative national mood. The zeitgeist has changed.

It will take time for individuals and society to process and come to terms with what has happened and what is continuing to unfold.

## REPORT STRUCTURE:



# Frontline workers and their families make up 42% of Irish adults. They have a different experience of Covid-19 than the rest of the population

Essential Frontline Workers	%	People
Frontline healthcare workers	6%	223,000
Other essential services frontline workers	12%	446,000
<b>Total frontline workers</b>	<b>18%</b>	<b>669,000</b>

1 in 5 Irish adults (669,000) is working in the frontline during the crisis.

When those who live with frontline workers are added, this accounts for 42% of Irish adults (1.56 million adults)

There are two very different and very significant 'tribes' experiencing the impacts of the crisis in very different ways.

**42% frontline – active role**  
**58% lockdown – passive role**

# Covid-19 is something that most people are trying to help others avoid rather than something that they expect will impact their own health directly



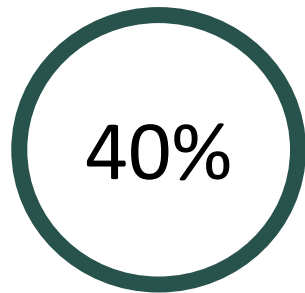
I have or suspect I have had Covid-19



I have self isolated at some stage



186,000 Irish adults either have had or suspect they have had Covid-19, but six times this number have taken precautions against catching or spreading the virus by self-isolating at some stage.



Genuinely concerned of catching Covid-19 myself.



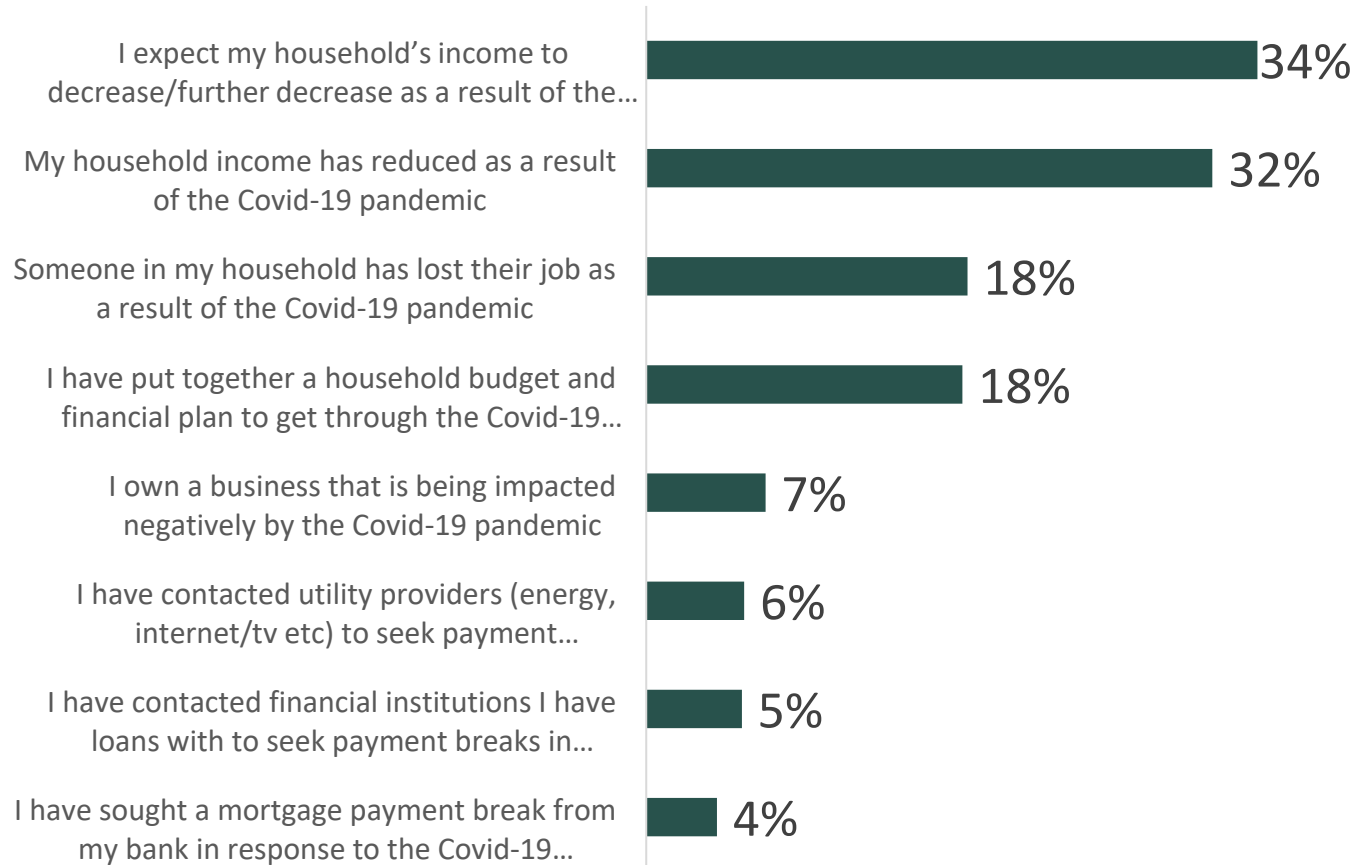
Genuinely concerned that my family may catch Covid-19.



Irish adults are more concerned that family and loved ones may catch Covid-19 than they are of catching it themselves.

# There is a tribe on the economic frontline feeling the financial impacts of the crisis, and a separate tribe which is feeling relatively little impact

Covid-19 Crisis Financial Impact

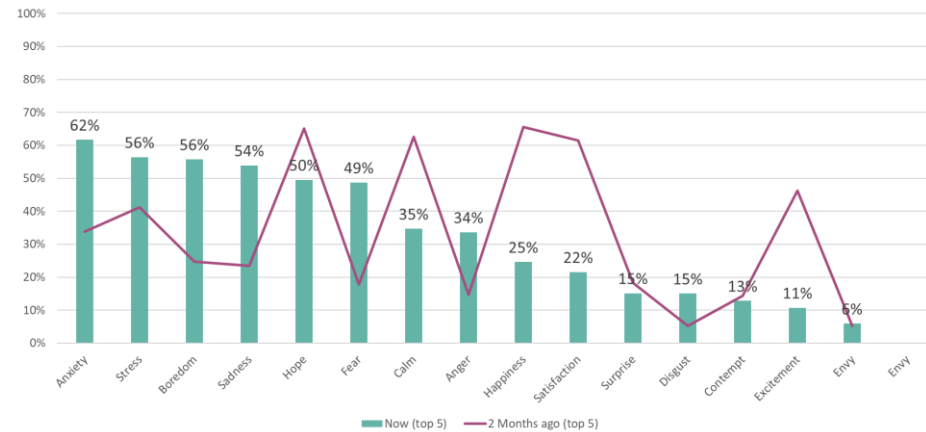


- 1 in 3 Irish adults has experienced a reduction in household income due to Covid-19 (1.19m), and 32% expect income to reduce/reduce further in the future.
- Almost 1 in 5 (18%) live in a household where someone has lost their job, and over 260,000 (7%) Irish adults own a business which is being negatively impacted by the crisis.
- 4% of Irish adults (149k) have requested a mortgage break due to Covid-19.
- Despite the significant reach of negative financial impacts, just 18% of all adults have put together a household budget plan.

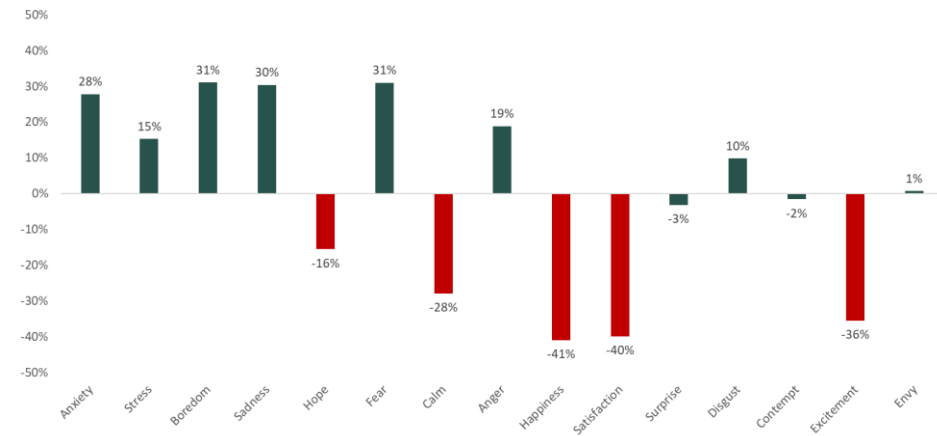


# Emotional and psychological wellbeing has shifted significantly and rapidly towards a much more negative disposition

Emotions before and during Covid-19.



Change in emotional & psychological wellbeing before and during Covid-19



Anxiety, stress, boredom, sadness, hope and fear are the dominant emotions felt during the onset of the Covid-19 pandemic in Ireland.

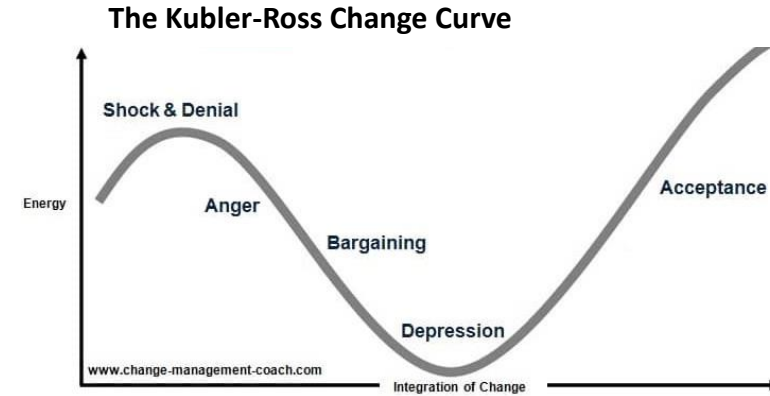
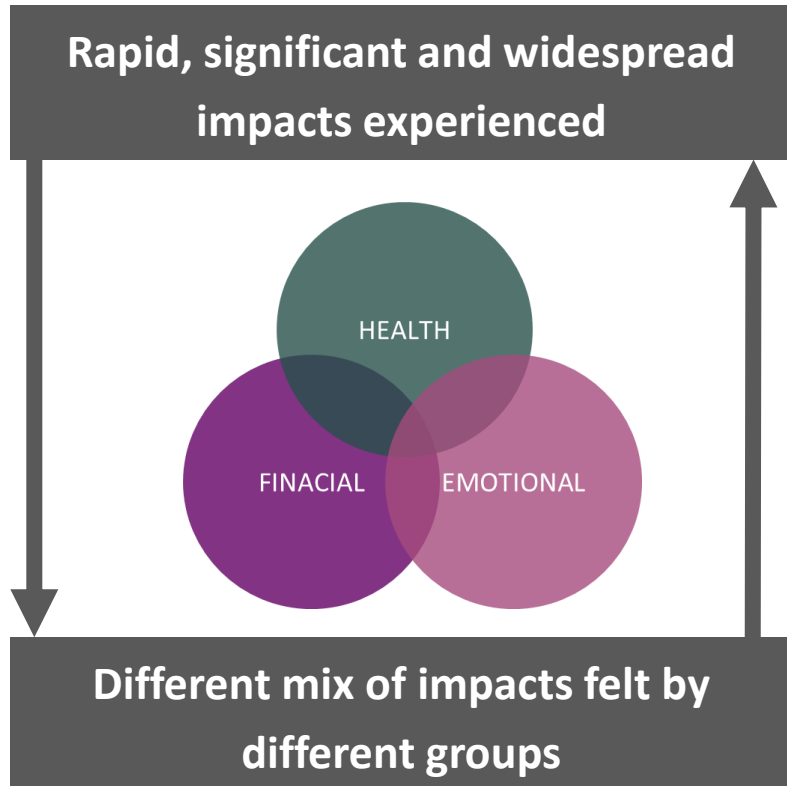
Boredom, fear and sadness are the emotions which have increased most. Happiness and satisfaction are the emotions which have declined most. The dramatic swing in emotions is only matched by the speed at which these changes have occurred.

Hope remains somewhat intact, but has also declined significantly. This hope is brittle and not as confident and well-founded as it was before Covid-19 arrived in Ireland.





# Rapid, widespread and significant impact has been felt by everyone. Only now are we beginning to process what this really means



There is much to process and we are at the early stages of **shock and denial**, rather than having really come to grips with what has happened and what it all means. This is a journey that is just beginning and that will be shaped by how Ireland chooses to respond to ensuing events over the coming months.....and years.

# Now > HOW WE ARE COPING

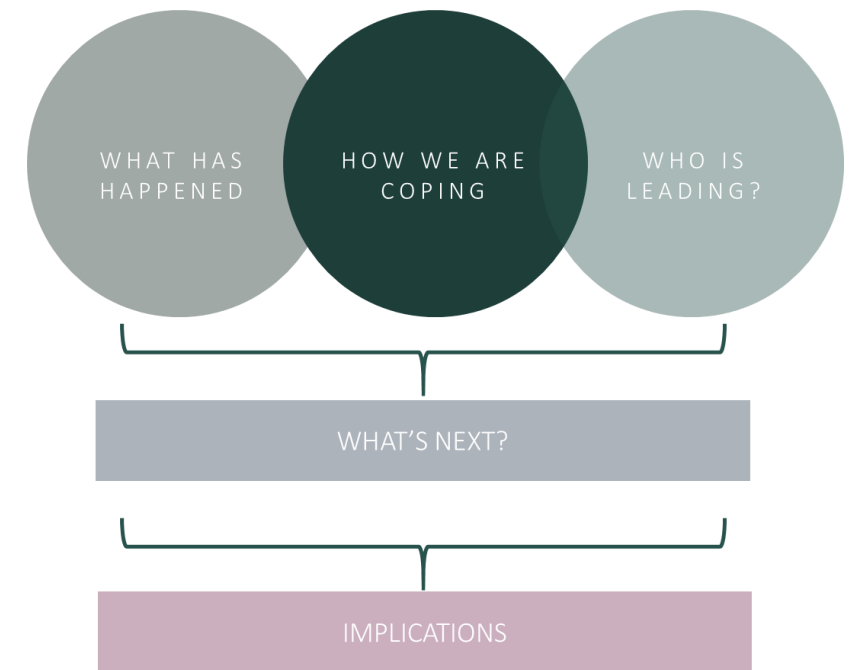
## SUMMARY:

As a nation Ireland is coping relatively well psychologically, for now. We are finding resilience in the belief that “others” have it worse, and also in looking forward to being able to do again the things we enjoyed that have been temporarily taken away.

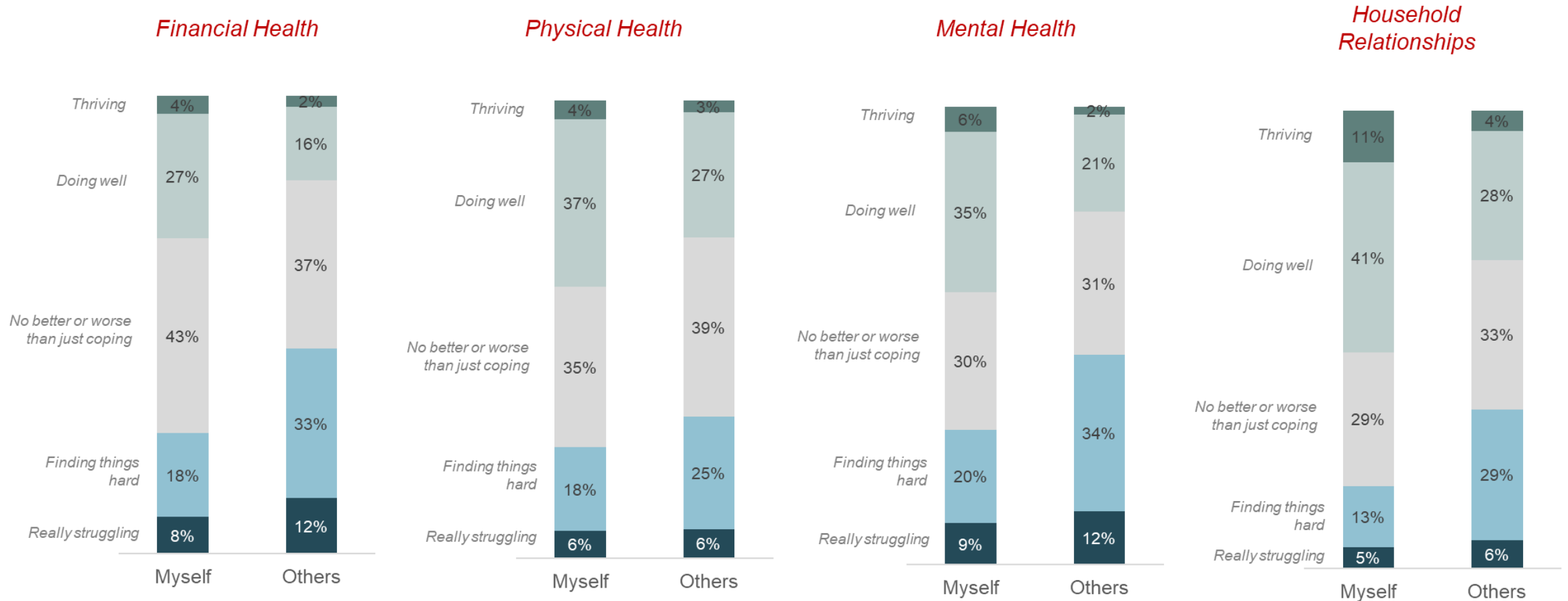
The stability and strength of this resilience is set to become more tested as time passes.

- As people begin to process what is happening to them and what the longer term consequences might be, things will become more emotionally and psychologically challenging. It will be more about “my” circumstances rather than “others” health and wellbeing.
- It will become more evident that some people are more affected than others. Divisions will emerge and perceptions will arise about a lack of fairness - “we are all in this together” may become a satirical jibe rather than a rallying call.

## REPORT STRUCTURE:



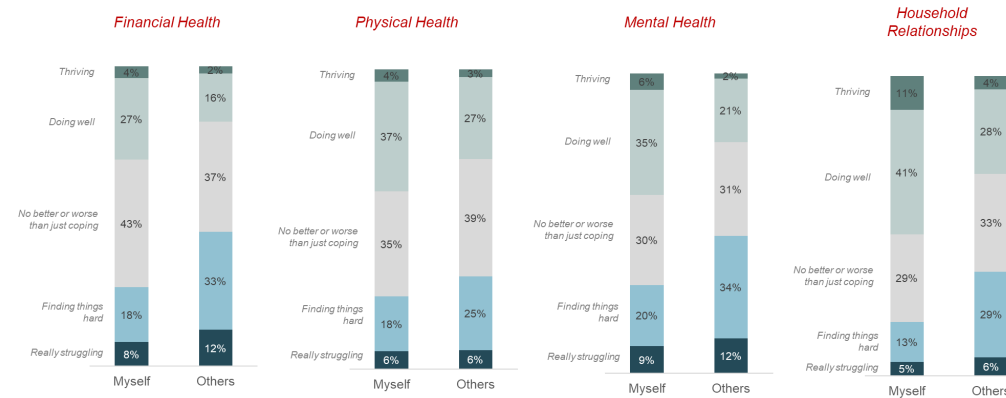
# With respect to finance, physical and mental health and household relationships, Irish people think that others are struggling more than they are themselves



Q.10 For each of the following dimensions how well or poorly do you feel you are personally doing during the Covid-19 pandemic?  
 Q.11 And how well or poorly do you feel others are coping on each of these same criteria during the Covid-19 pandemic?



# Irish adults are showing remarkable fortitude and resilience in the face of extreme and rapid emotional, financial, lifestyle and health shocks. How is this best explained?



Q.10 For each of the following dimensions how well or poorly do you feel you are personally doing during the Covid-19 pandemic?  
 Q.11 And how well or poorly do you feel others are coping on each of these same criteria during the Covid-19 pandemic?

## Character?

Ireland understands the challenge, is meeting it head on and is truly resilient and strong as a nation.

*But do Irish adults have the stamina to maintain this level of resilience or will cracks and pressure valves emerge?*

## Shock?

Events have moved so fast that Ireland is in a state of national shock with most people yet to process and realise the full extent of the impact and consequences.

*What will this look and feel like when it eventually plays out?*

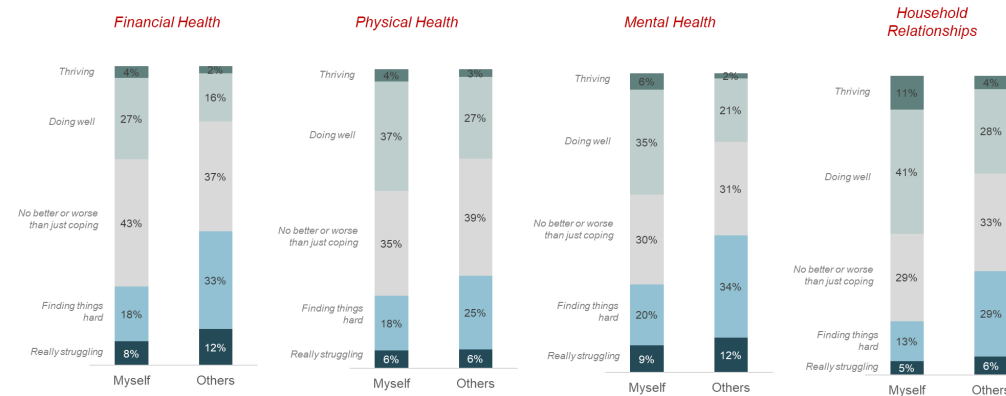
## Government?

Government mitigation measures (e.g. Covid-19 wage/unemployment assistance, debt moratoria and business supports) provided an adequate cushion for most to cope in the short term.

*What will happen when the State no longer provides this support?*



# Even if we are genuinely coping well, are there pitfalls ahead?



Q.10 For each of the following dimensions how well or poorly do you feel you are personally doing during the Covid-19 pandemic?  
Q.11 And how well or poorly do you feel others are coping on each of these same criteria during the Covid-19 pandemic?

## Survivor Guilt:

With much coverage of negative news and warnings about suffering and struggling, the majority of people feel they are coping relatively well. Importantly, even if they are struggling there is a sense that others are finding it harder.

This can lead to a sense of survivor guilt when the **'we are all in this together'** narrative is continuously repeated.

*Is the media coverage and social media chatter about how Irish people are facing the crisis accurate or is it just the sharp end of the wedge?*

## Emotional suppression and possibly resentment:

Identifying others as having tougher experiences than we do can lead to a sense that our own suffering doesn't warrant the same attention.

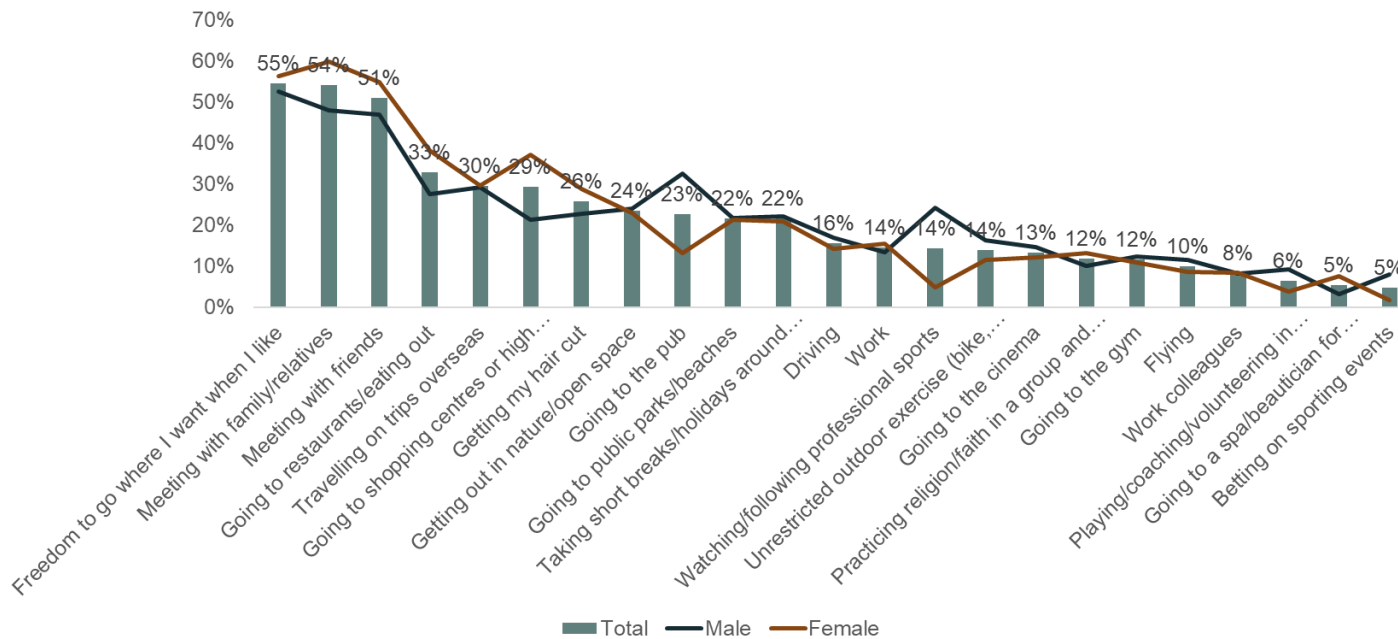
This can lead to suppression of feelings, failure to surface and address underlying issues and the storing up of bigger psychological problems over the longer term.

*Could the currently suppressed feelings of a large cohort of people pivot into a collective sense that their voices are not reflected in the crisis discourse? Could this sense of being unheard, unacknowledged or unimportant (by the 'establishment') risk the creation of deep resentment which could generate social disruption?*



# The act of reminiscing and missing the world that was has a therapeutic and calming effect

## What are you missing most?



### The motivating power of hope:

Even though many of the things that people miss most are not available to them now, there is an expectation that soon they will have them back. The act of reminiscing and looking forward to these things gives people a sense of psychological comfort.

The sense that the familiar world that people once knew has not changed or gone away provides considerable solace.

### Lives left behind:

On the other hand, there are those who feel that the world as they knew it is not on pause but has gone for good – and was lost at breakneck speed.

They will miss some parts of their lives more than others, and how they cope with that loss and how they rebuild, replicate and replace it will sometimes be disjointed and difficult and at other times it may be exciting and joyful.

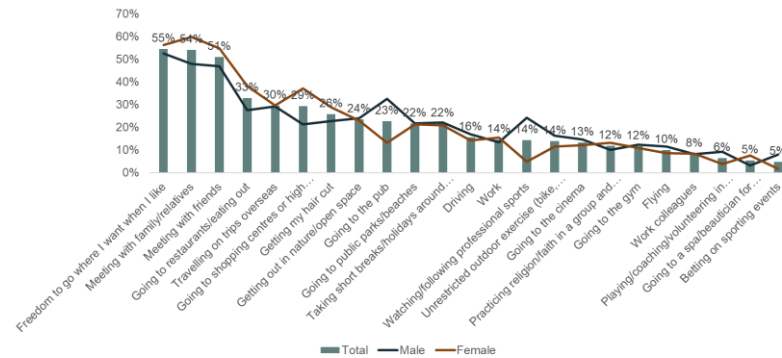
But it will not lead back to life as it was in January 2020.

Q.9 Which of the following do you miss most during the measures put in place to combat the spread of Covid-19. Please tick the 5 that you miss most.



# Balancing the desire to go back in time, against acknowledging and embracing a different kind of future

What are you missing most?



Q 9 Which of the following do you miss most during the measures put in place to combat the spread of Covid-19. Please tick the 5 that you miss most.

## Consumerism and Exploration

### Retail therapy:

After ‘freedom to travel’ and ‘meeting with family and friends’, Irish adults most miss ‘eating out’, and ‘going shopping in shopping centres or high streets’.

### Wanderlust:

There is a desire to be able to travel overseas again, with 3 in 10 Irish adults missing overseas travel and 2 in 10 missing short breaks. This ties in with a longing to regain the freedom to go where they want, when they want.

Even when what people miss most is permitted once more, the bigger question remains.

What will we feel comfortable doing again?

If, as anticipated, the experience of retail, travel, socialising and leisure are subject to new restrictions, will they be considered worthwhile and enjoyable?

And will people have the same spending power as they had 2 months ago, even if they feel comfortable travelling or going to a match?

As we learn to ‘live with Covid-19’ there is a dawning realisation that a return to the old normal is unlikely. Imagining that our past can again become our future then becomes less useful as a coping mechanism.

This raises questions about Ireland’s real capacity to cope and to hope, and monitoring the national mood will become ever more important.



# Now > WHO IS LEADING?

## SUMMARY:

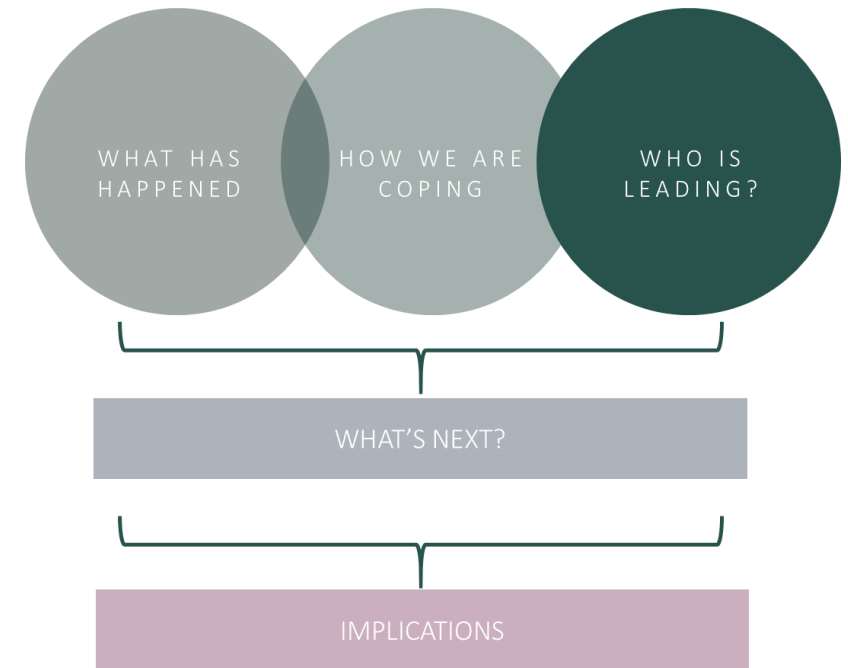
Ireland's political leadership has been considered strong and is well-regarded by the public to date. A complex and fast moving set of circumstances required decisive action. The steps taken and the clarity of communication about the why, the what and the how was perceived to be enacted in people's best interests. The majority of Irish adults feel that communication has been good and Irish political leaders are rated as performing much better than UK and US leaders.

An Post is the brand given most credit for how it has responded and acted during the crisis.

Supermarkets and the HSE are the organisations most recognised as having made coping with the onset of the crisis easier/better for the people of Ireland on the ground.

There are emerging warning signs indicating that some people find it difficult to understand what is true or false about a range of issues. As we live with Covid-19 and the issues get more complex, it will be important for people to have accurate, clear and trustworthy information from government, policy makers, businesses and brands.

## REPORT STRUCTURE:





## Government has shown relatively good leadership and communication to date

63%

I feel that the government has been looking after my interests during the Covid-19 pandemic

53%

Government communication about the Covid-19 pandemic has been clear and effective

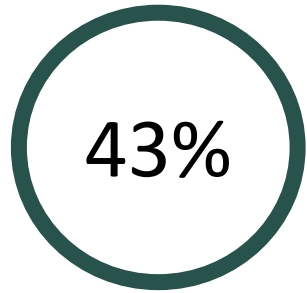
61%

It is clear to me what I should do to help the national effort in combatting Covid-19

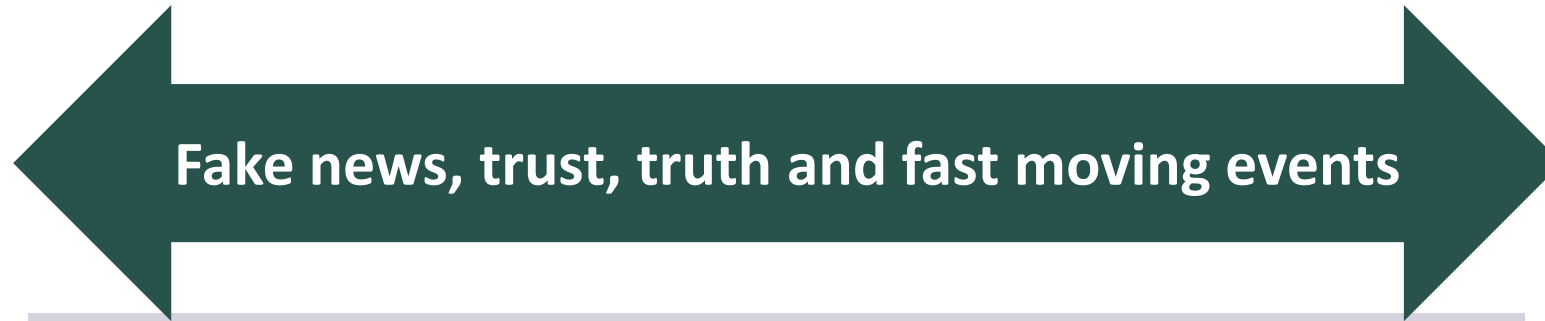
Irish people strongly believe that Government actions have been taken in people's best interests. Government communication has been effective in that people are clear about the actions they need to take as individuals.

Given the rapid onset of the crisis, it was no small achievement for Government to deliver effective communication that convinced the general public that it was acting in their best interests.

# For a significant cohort, trustworthy information and truth are hard to determine



I find it hard to know what is true and what is false about the Covid-19 pandemic.



Covid-19 makes me realise and appreciate the value of trusted news and media outlets in sharing factual and truthful information.

There is a cacophony of coverage, reporting and commentary on Covid-19.

This is making it difficult for a significant proportion of people to distinguish between what is true and what is false.

Competing narratives and debate on issues such as PPE, reporting, testing, interpretation and international comparisons on data, face masks, origin of the virus, best strategy for coming out of lock down etc. etc., are making it hard for people to know what to believe.

Unsurprisingly, in this context, the importance of trusted news and media outlets has become more valued by the majority of Irish adults.




# Dr. Tony Holohan is the most highly rated individual in terms of contribution to fighting Covid-19

When asked to grade the performance of a range of individuals and groups on how well they have responded, Irish political figures fare well.
























Leo Varadkar and Simon Harris both receive a solid B, with Boris Johnson and Donald Trump both receiving an F.

CMO, Dr. Tony Holohan received the highest individual grade - just slightly short of the A mark by a single percentage point.



A	Healthcare workers		
	Retail workers		
B	Tony Holohan	An Garda Siochana	Me personally
	Bus/train drivers		
	Leo Varadkar		
	Simon Harris		
C	Fergal Bowers		
	Paddy Cosgrave		
D			
F	Boris Johnson		
	Donald Trump		

# An Post is the highest rated brand in terms of how it has responded, and the only brand to receive an A

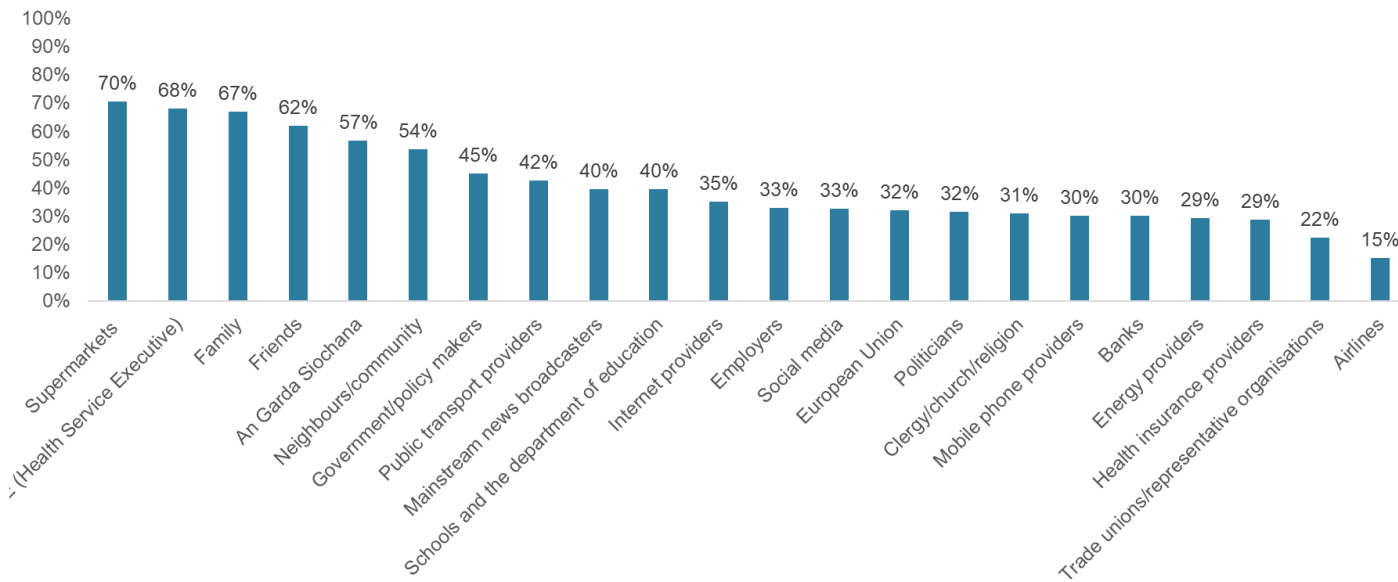
A	
B	        
C	           
D	

Supermarkets all perform well and on par with each other, suggesting that the category response is applauded but there is no one retailer that is perceived to have broken ahead of others.

Considering the increased appreciation of independent and trusted news during the crisis it is perhaps unsurprising to see RTÉ rating highly, and it is significant that RTE scores higher than its news and media category peers.

# Supermarkets and the HSE are acknowledged as doing most in helping Ireland cope with Covid-19

## Making coping with Covid-19 easier?



As Ireland wrestles to come to terms with life under the shadow of Covid-19, certain categories and groups of individuals have helped people acclimatise to this change.

This on-the-ground leadership and support has been seen on many fronts, but most notably from supermarkets and the HSE.

Supermarkets have a broad reach across many cohorts, and the HSE has a very critical and important role among a smaller number of cohorts. Both are acknowledged as playing a meaningful role helping the many and the few in ways that have made a difference.





## > NEXT

Ireland is primed for change like never before but how will priorities be reshaped, and what choices will have to be made as the country emerges from the crisis?

# Next > WHAT'S NEXT?

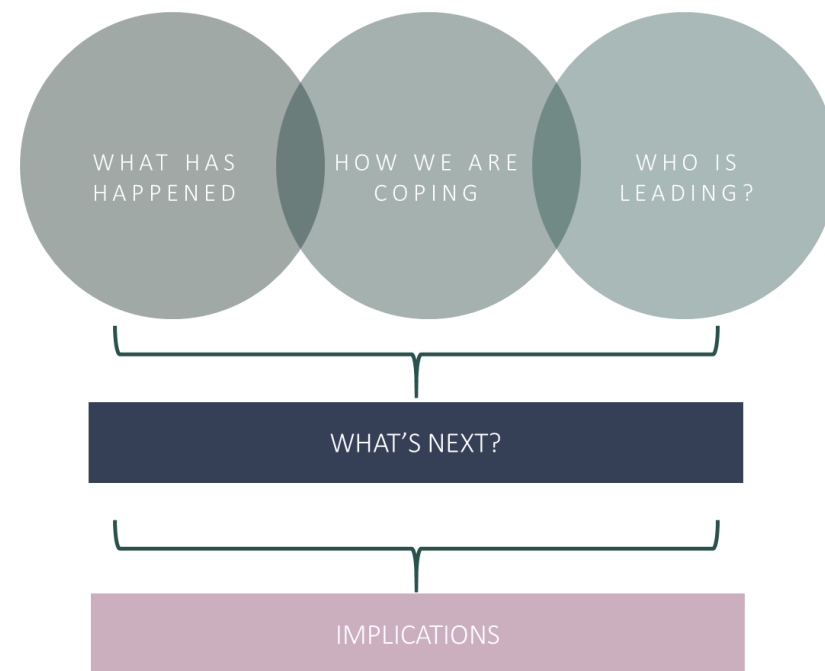
## SUMMARY:

The values and decision making compass of Ireland is changing significantly. Values are shifting and these will shape behaviours and decisions over the next decade.

Political, cultural and social systems have been upended and paused; how they re-start will be based on the discussions and debates that policy makers, individuals, interest groups, experts and businesses put forward now.

Those who understand the moving parts will be better equipped to participate, remain relevant and create value for what comes next.

## REPORT STRUCTURE:



# Over the next 12 months people intend to re-organise and re-set their priorities

Increasing Priority	Growth
Spend more time with family	+59%
Support and help your family	+57%
Health and wellness	+54%
Maintain or improve physical health	+52%
Improve mental health	+47%
Eat healthy diet	+45%
Spend more time with friends	+42%
Enjoy yourself and live for the moment	+42%
Making sure there is enough coming in to meet day to day expenses and bills	+39%
Support and help your friends	+38%



Decreasing Priority	Decline
Be the first to have the latest fashions/clothes	-55%
To be able to buy premium/luxury brands	-52%
Be the first to have the latest technology	-52%
Start a family (have children)	-40%
Buy a car	-37%
Move out of family home	-36%
Buy a home	-34%
Be connected on social media	-18%
Contribute to the greater good of Ireland's economic health by paying more tax	-15%
Further your formal education	-13%

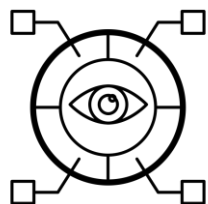
There is often a 'say-do' gap between virtuous future intentions and the follow-through action. However, with the anchoring force of the inertia of previous daily life removed, Ireland is primed to follow through like never before.

The priorities that emerge and solidify as Ireland moves into the new 'living with Covid-19' phase will determine the trade-offs to be navigated and ultimately the choices that will be made. We are at a crossroads and the thinking and arguments that emerge now will ultimately inform the kind of Ireland we become. This will have consequences for businesses and brands everywhere.





# Predictions: it's not about being right, it's about being ready



## Predictions

Health  
Education  
Work  
Politics  
Tourism  
Retail  
Travel and transport  
Economy and economics  
Socialising  
Sports

There are many wide reaching predictions and questions about what the future might look like as a consequence of the Covid-19 crisis.

It is helpful to think about the future and what might unfold, but it can be more instructive to understand how people's priorities will shift in terms of what future they may want to encourage and pursue.

Covid-19's health and economic impacts will set boundaries on what can and cannot be done. However this wide scope is just the field of play. How the future unfolds will be directed and dictated by the shifting priorities and psychological mood of Ireland which is being shaped now. Debates will be had, trade-offs argued over and the ultimate decisions will be shaped by the emerging national value system and a new zeitgeist.

A clue to that future direction is how we as a nation, fuelled by shifting priorities, are currently orientated to think around big issues that are primed to change significantly as a result of the crisis we are going through...

- My post Covid-19 world
- Pride and recognition
- Tax and recovery
- Changing the system



My post Covid-19 world



Pride and recognition



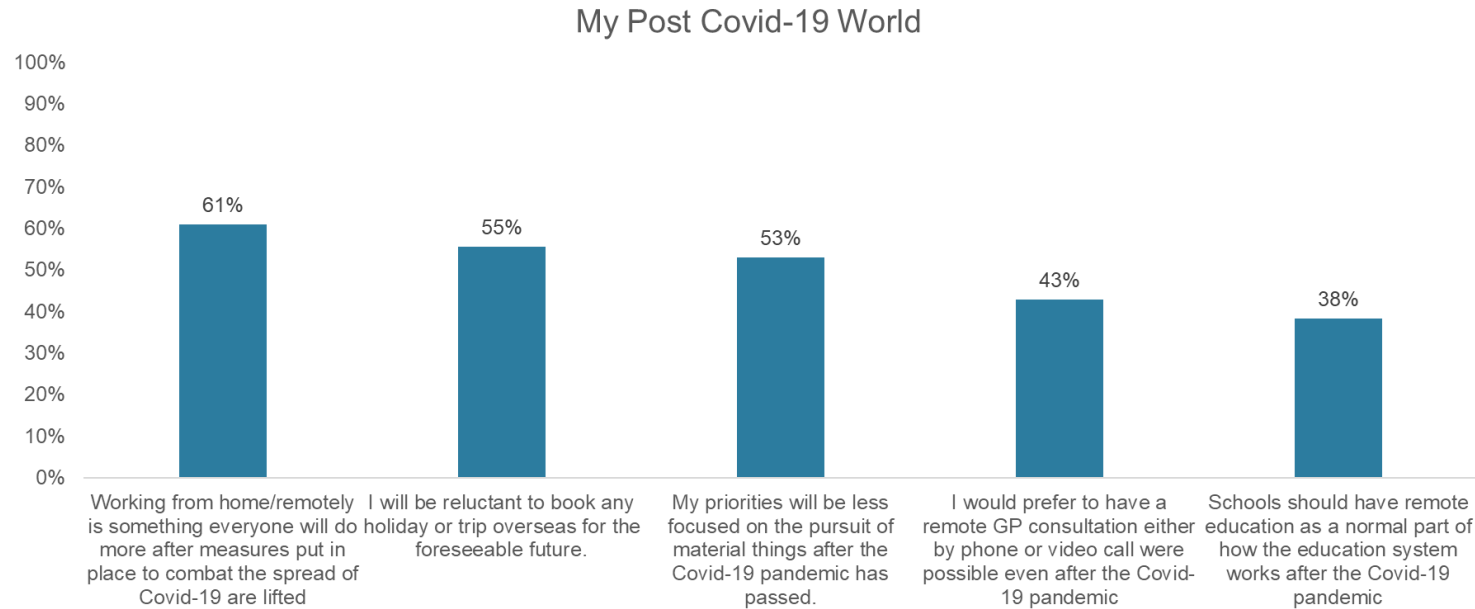
Tax and recovery



Changing the system



# Remote working is among one of most likely things to become a desired and accepted post crisis reality



Remote working is an area where individuals feel they are more likely to see and accept changes, whereas remote education is something that requires more persuasion to gain public support at scale.

Unsurprisingly, most Irish adults are reluctant to consider booking holidays or overseas trips for the foreseeable future. A key question will be how to encourage and motivate people to travel again – and in the meantime, what could be done to replace the feeling and enjoyment derived from travel? Domestic tourism will need to factor in the degree of welcome that local communities in Ireland’s tourism hotspots are likely to provide to out-of-towners wishing to enjoy a staycation in their locality.



My post Covid-19 world



Pride and recognition



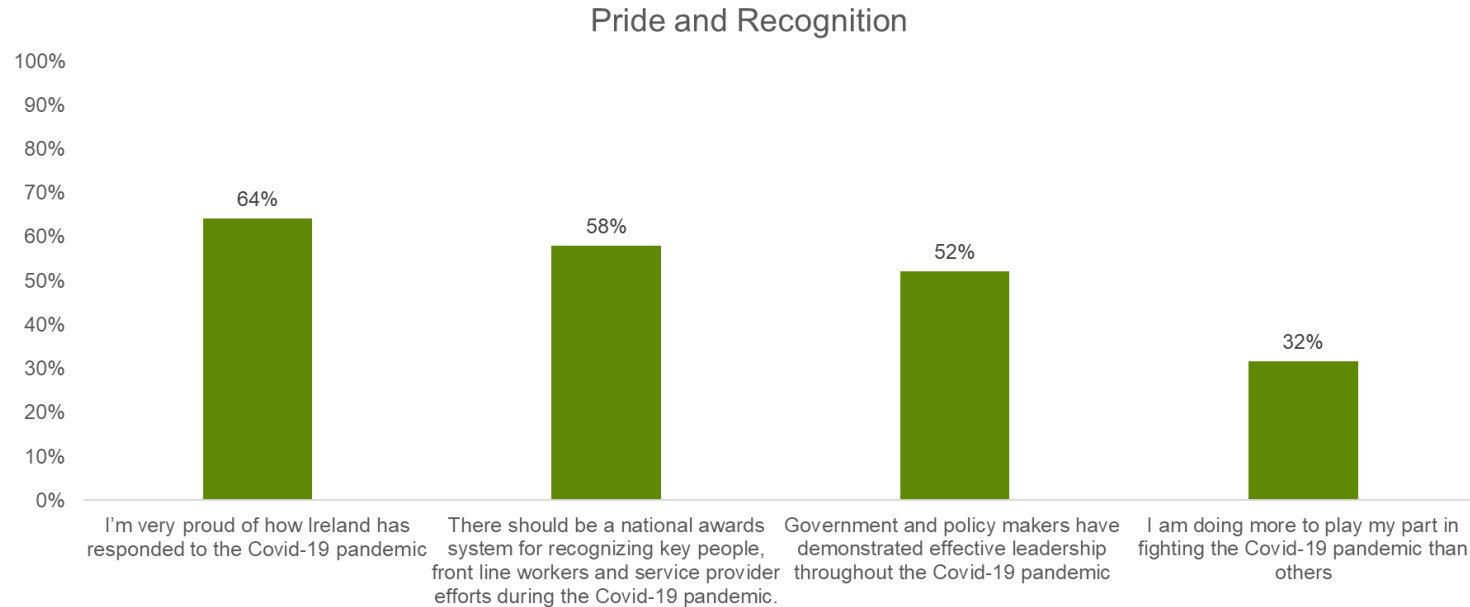
Tax and recovery



Changing the system



# There is a strong national pride in how Ireland has responded to Covid-19 and there is a desire to recognise and celebrate those who have done most



My post Covid-19 world



Pride and recognition



Tax and recovery



Changing the system

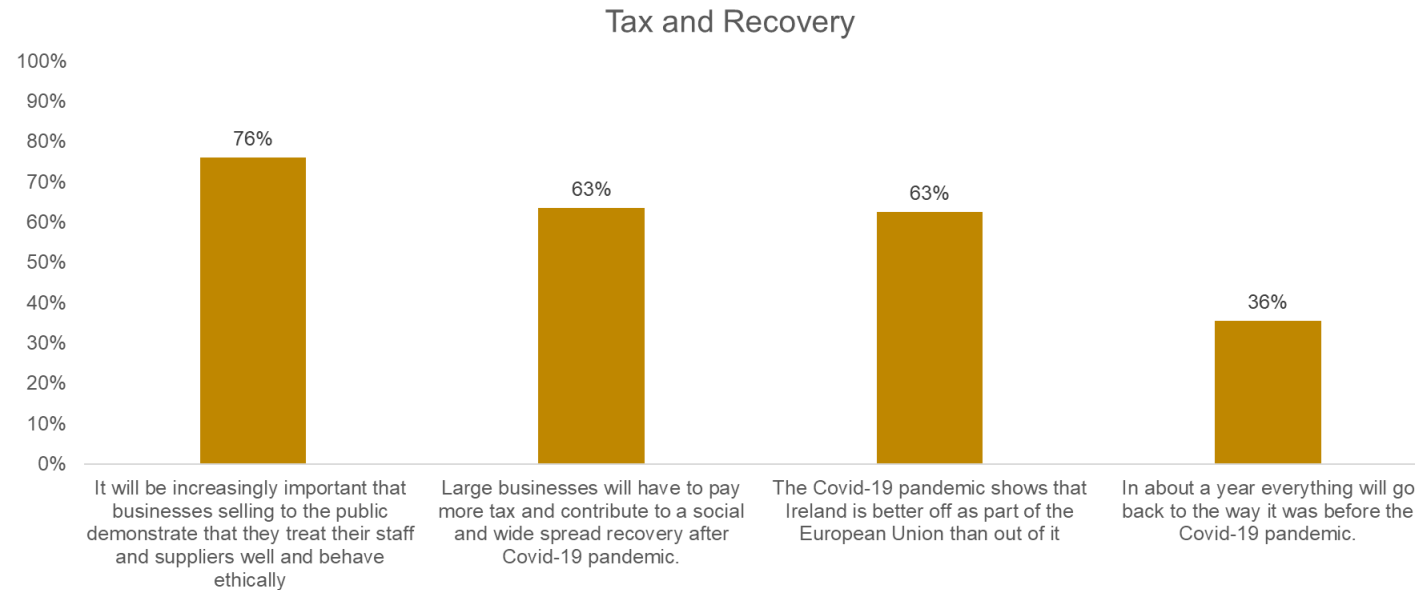
There is a strong pride in Ireland's response to Covid-19 as a nation, and there is a significant appetite to recognise and acknowledge those on the frontline and others who have gone above and beyond. Who will guide and facilitate this desire to give credit where credit is due? In the absence of an honours system, what is most appropriate?

It is interesting that although Irish people feel proud as a nation and want to celebrate those who have stepped up, they also have the sense that they themselves have not contributed adequately. Is there a burgeoning sense of inadequacy bubbling beneath the surface? Are people feeling pride because of those who acted or are they feeling helplessness in not having been able to contribute to the cause themselves?

It will be important to mitigate against divisiveness by recognising the effort of those who have gone above and beyond as well as those, who, through their compliance with the rules of lockdown, also contributed to flattening the curve and protecting others as best they could.



# Pressure on business to contribute through tax, transparency and ethics will mount further as a result of the crisis



Most people feel that things will not return to normal 12 months from now, but the study highlights that, in fact, 1 in 3 feel that this might be the case – proponents of the V shaped recovery.

Taxation policy and ethics for business was on the agenda before the crisis, but there is a strengthening sense that businesses must pay their perceived fair share of tax and behave ethically. These are not mutually exclusive and there is a big call to action for organisations and brands to pay a fair share of tax and to demonstrate through their actions that they are behaving ethically – climate action, supply chains, employees, communities and every part of operations. Purpose is now centre stage.



My post Covid-19 world



Pride and recognition



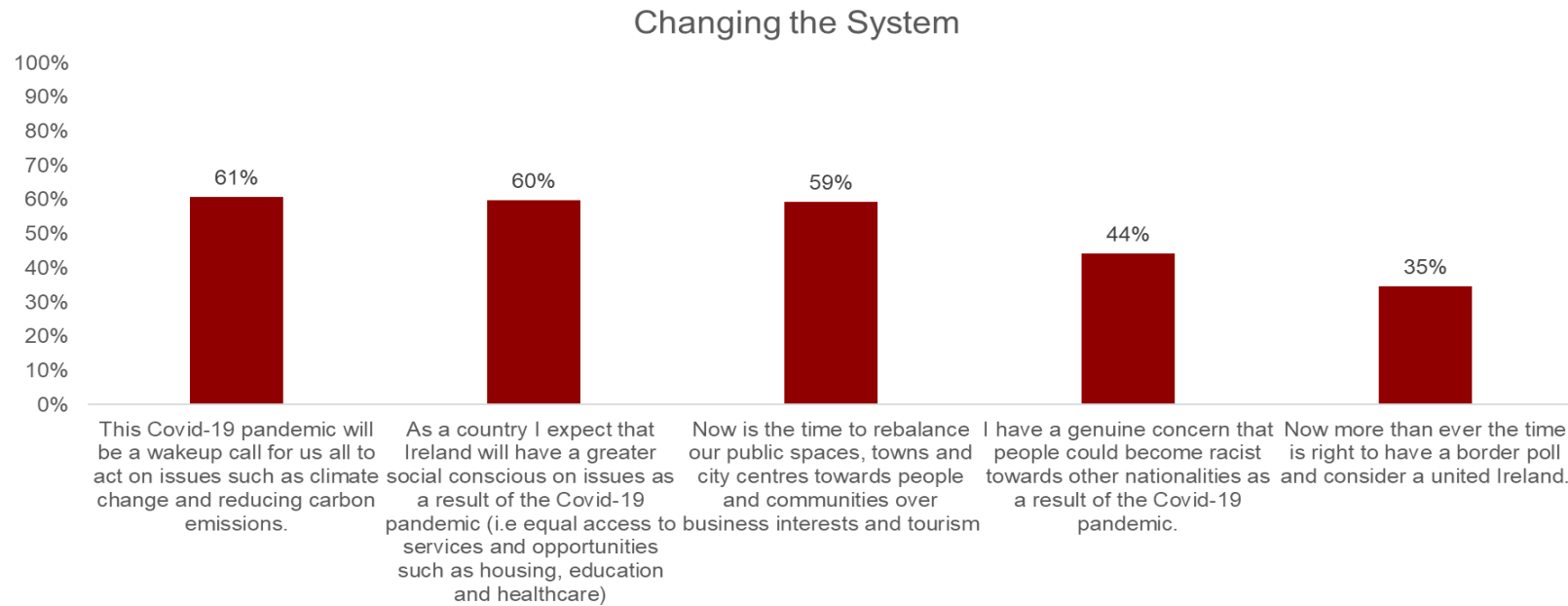
Tax and recovery



Changing the system



# The crisis has focused hearts and minds to fight for a system that is doing more on climate and is better on social equity



Climate action and national social consciousness are key areas that Irish adults believe must change as a result of the crisis. These issues were already in play, but the crisis has accelerated public opinion and there is now considerable momentum to make the change happen.

For example, how urban space is used is a hot issue. The accusation has been that the growth of tourism and economic development has led to exorbitant rents, squeezed out local residents, diluted culture and neutered character. This study suggests that the crisis could be a catalyst for mass reformation of town planning - the mood among Irish people is that this is the time.

On the darker side, 44% of respondents see a rise in xenophobia being a clear and present risk.



My post Covid-19 world



Pride and recognition



Tax and recovery



Changing the system



A person is silhouetted against a night sky filled with stars and the Milky Way galaxy. The person is standing on a small rock or mound in the foreground, looking up at the stars. The Milky Way is visible as a bright, colorful band of stars stretching across the sky.

## > NOW WHAT?

How can decision makers and leaders drive relevance and growth amidst volatility which is set to be with us for the foreseeable future?

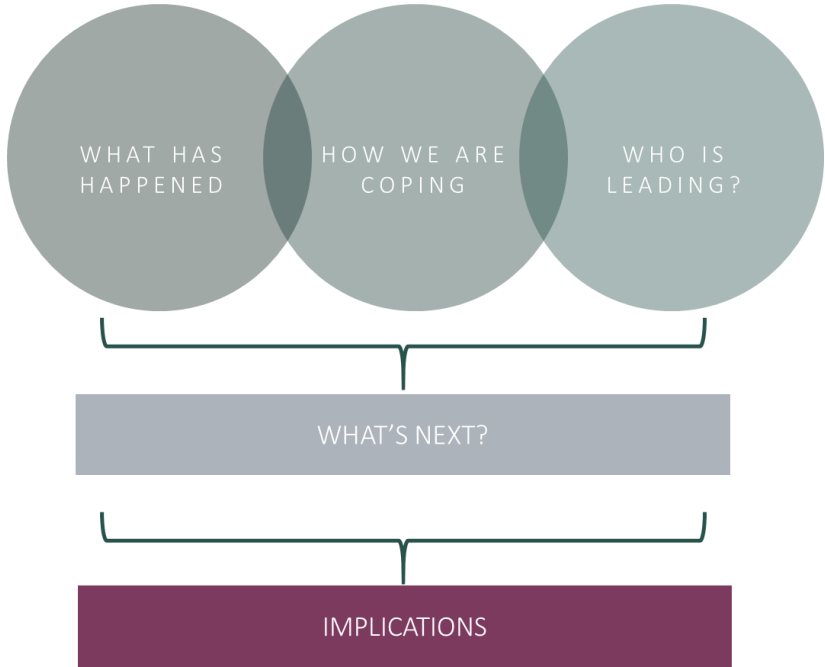
# Now What > IMPLICATIONS

So what?

What does it mean?

What should I do?

## REPORT STRUCTURE:



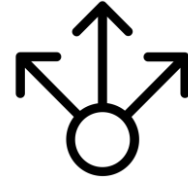
# Getting to relevance, value creation, and growth



## Trade-offs

New choices and decisions will need to be made that will require hard trade-offs for individuals, families, communities, business, society and Government.

Choices will be shaped by our shared emerging value system which will influence our decision-making priorities.



## Scenarios

The outcome is not set; it will be guided and shaped by the sensitive balancing act now required to strengthen social capital whilst encouraging enterprise.

Scenarios will start to reveal themselves – indeed they already have. Being able to identify likely outcomes and recalibrate against them will be key for decision makers forging their place in the emerging future.



## Relevance & Value Creation

From a purely commercial stance, if the trade-offs and scenarios unfolding are not well understood, it will be challenging to map a path to success.

The winners are likely to be those who have deep empathy and sensitivity to the changes taking place and the choices being made. They will be best positioned to reimagine, reinvent and renew.



# NOW > NEXT



## The Canvas

Uncertainty and volatility

Significant change at pace

New values shaping choices

New narratives to be defined

New value to be created

Reimagine not recycle

>

Reframe not rewind

## How to Win

Connected to zeitgeist

Effective environment and horizon scanning

Re-imagining mindset – opportunities and solutions

Agility in responsiveness

Entrepreneurial spirit

*Get in touch today to see how  
Genesis can help you build  
powerful and sustainable  
business, market and customer  
strategies. Fast.*

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