

# SIGNALS

Understanding the  
coronavirus crisis

3 April 2020

AN IPSOS WEBINAR

Eric Landwaart Chief Client officer  
Maaïke Goes Head of Marketing

GAME CHANGERS



# CORONAVIRUS: The story so far

1

**CORONAVIRUS  
BECOMES  
REAL**

2

**A FAST  
CHANGING  
CLIMATE OF  
OPINION**

3

**CHANGING  
BEHAVIOURS:  
The early signs**

# CORONAVIRUS BECOMES REAL



## TRACKING THE CORONAVIRUS

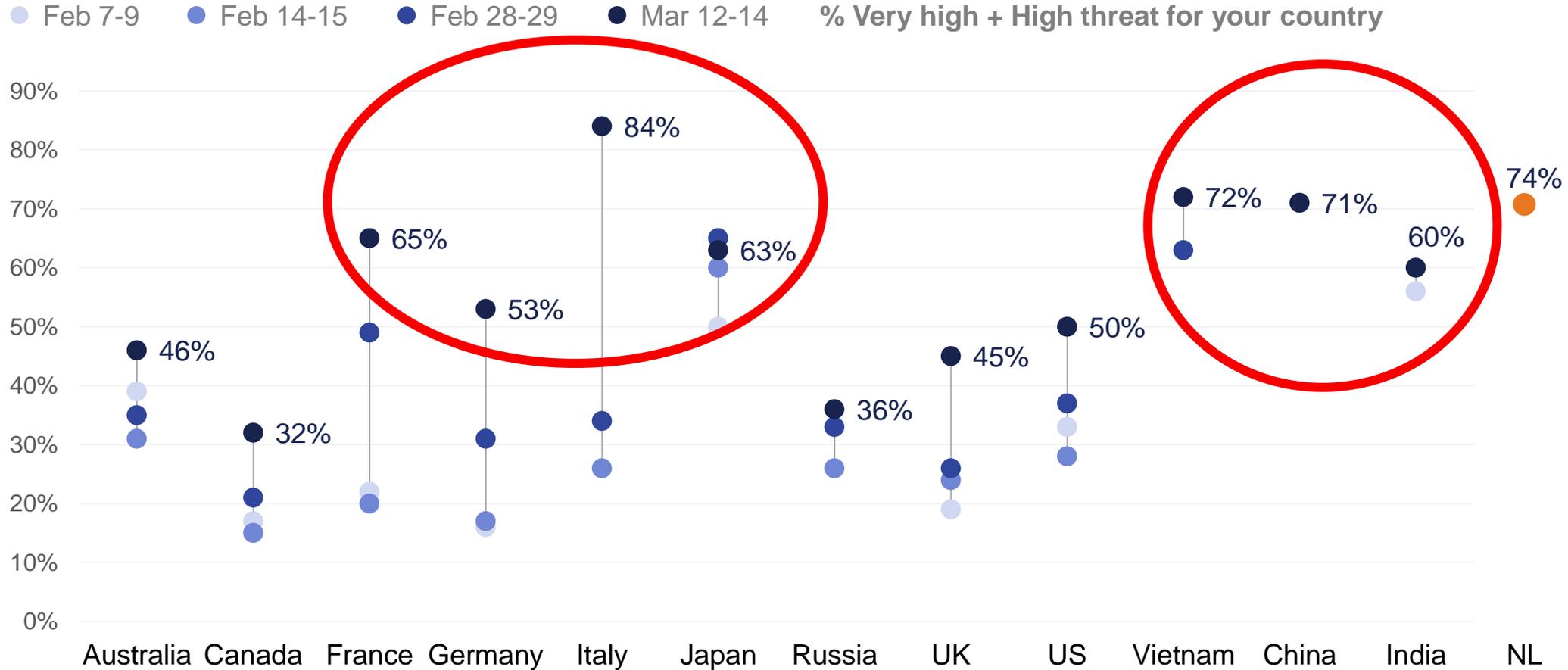
RESULTS FROM A MULTI-COUNTRY POLL

February – March 2020

GAME CHANGERS

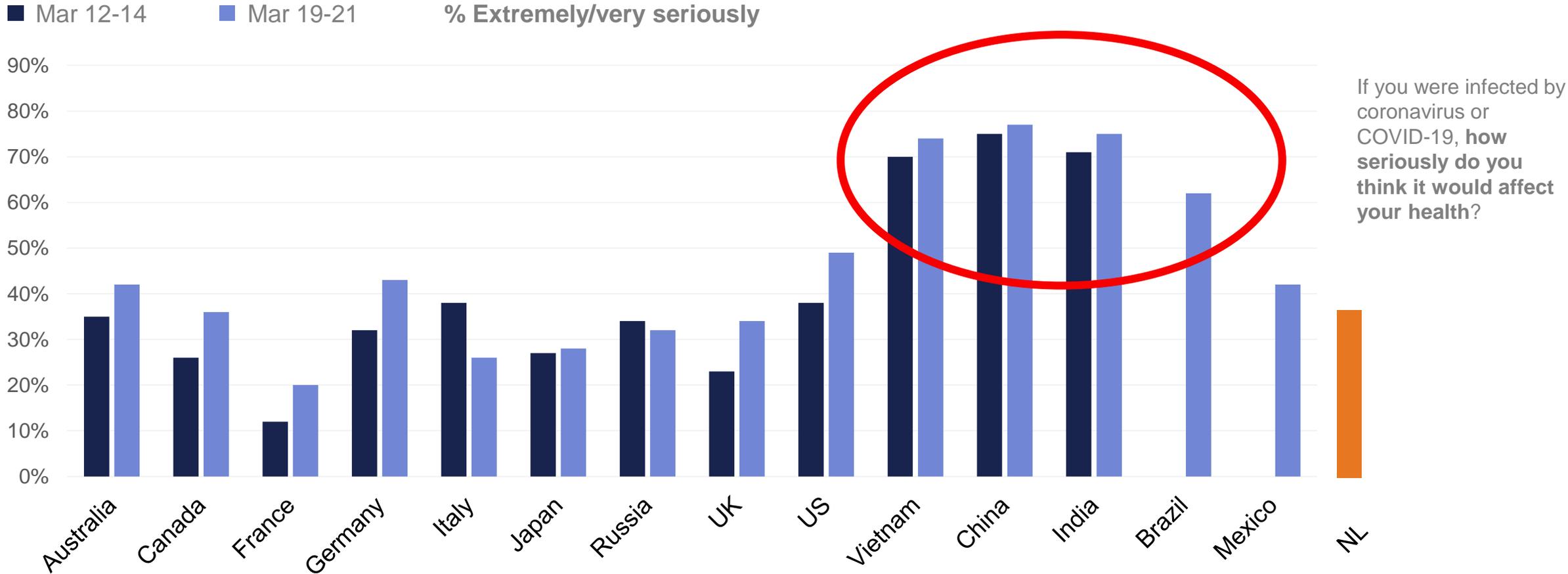


# RISE IN PERCEPTION OF THREAT TO COUNTRY

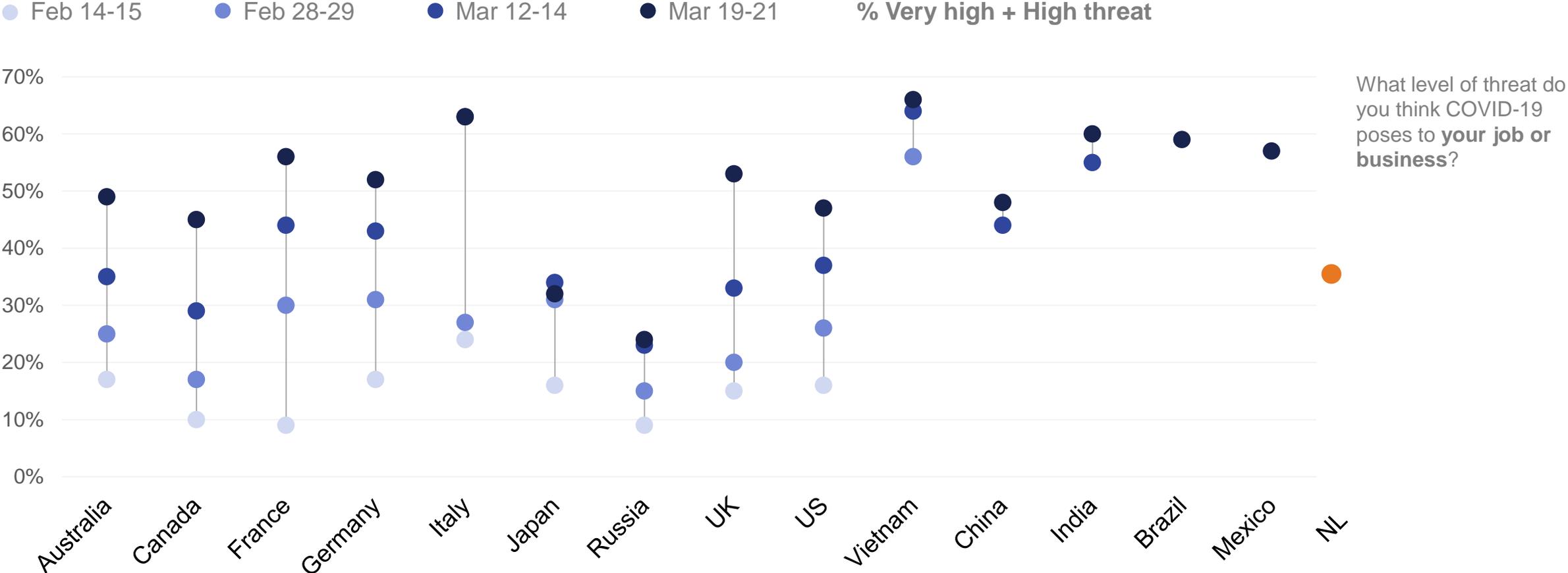


What level of threat do you think the coronavirus poses to **your country**?

# How seriously do you think COVID-19 would affect your health?



# DO YOU THINK THAT COVID-19 POSES A THREAT TO YOUR JOB OR BUSINESS?



# CORONAVIRUS: The story so far

1

**CORONAVIRUS  
BECOMES  
REAL**

2

**A FAST  
CHANGING  
CLIMATE OF  
OPINION**

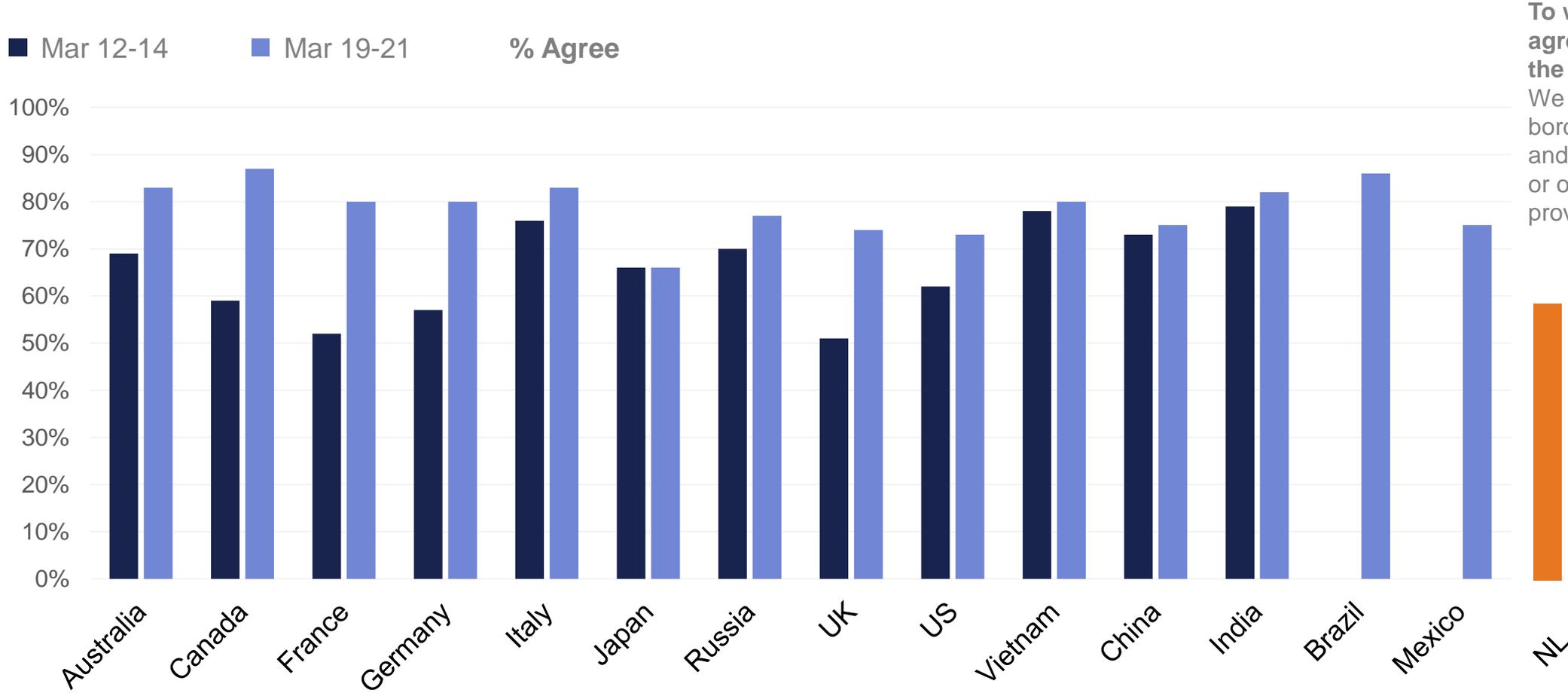
3

**CHANGING  
BEHAVIOURS:  
The early signs**

# A FAST-CHANGING CLIMATE OF OPINION



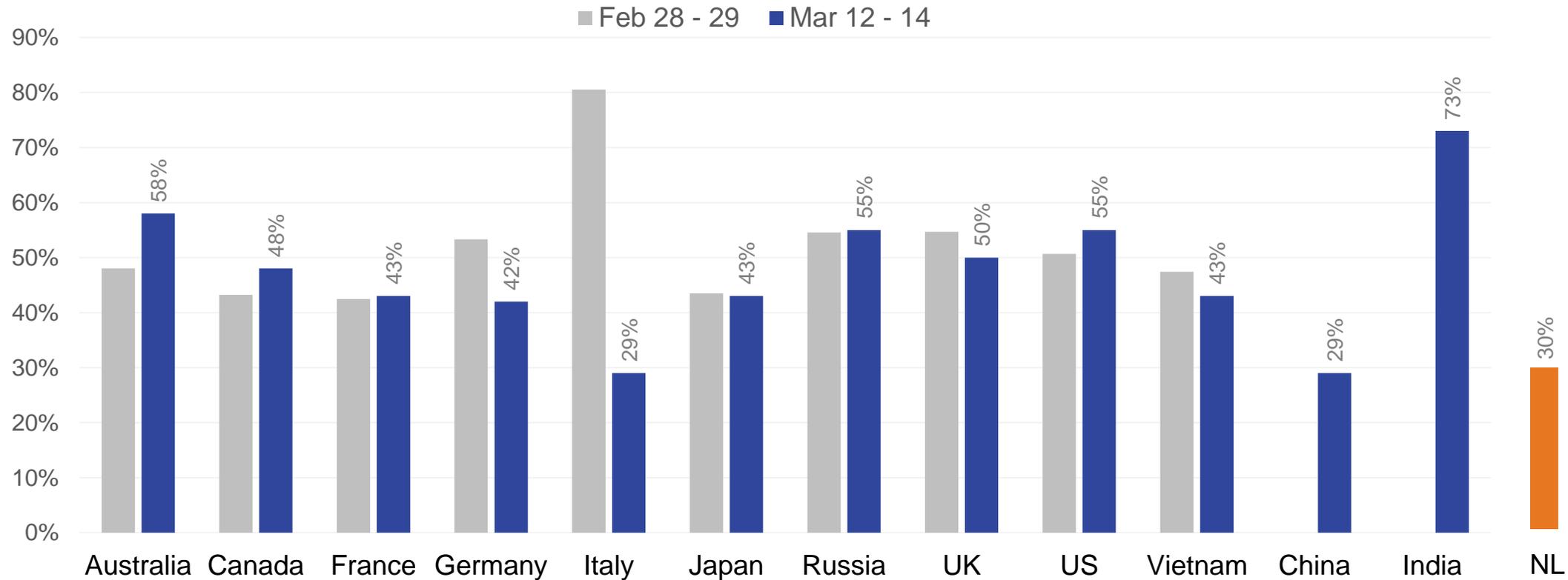
# DO YOU THINK THE BORDERS OF YOUR COUNTRY SHOULD BE CLOSED UNTIL COVID-19 IS CONTAINED?



**To what extent do you agree or disagree with the following:**  
 We should close the borders of my country and not allow anyone in or out until the virus is proven to be contained.

# END FEB: ITALY THOUGHT THE MEDIA WAS EXAGGERATING

% Strongly + Somewhat Agree



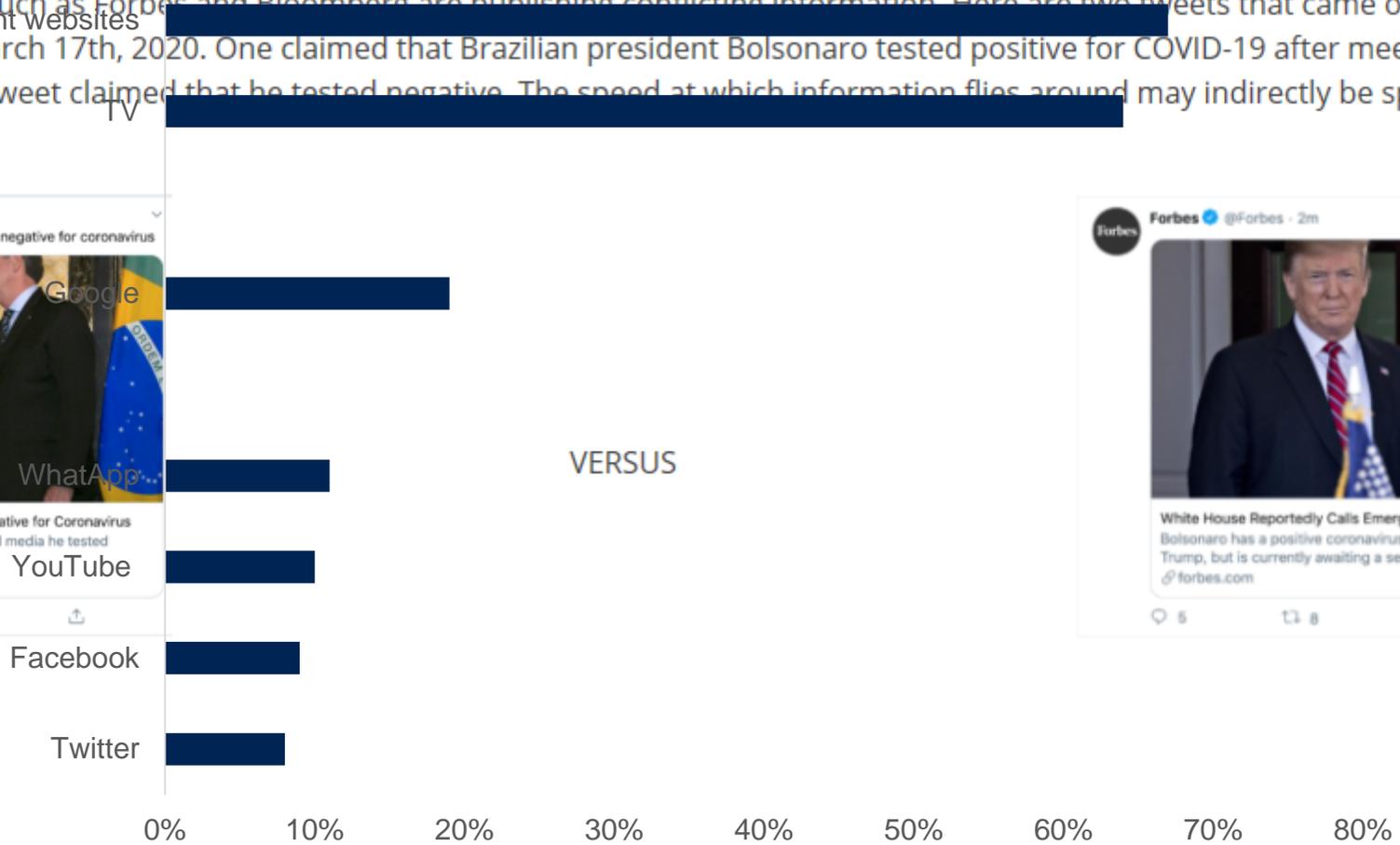
The media has **exaggerated the extent of the coronavirus outbreak?**

*Note: Feb 28-29 used a modified scale; this was adjusted for indicative comparison.*

# AND HOW ABOUT SOCIAL MEDIA?

## Best media for Corona information in the Netherlands

Even reputable news sites such as Forbes and Bloomberg are publishing conflicting information. Here are two tweets that came out within one minute of each other on March 17th, 2020. One claimed that Brazilian president Bolsonaro tested positive for COVID-19 after meeting U.S. President Trump, and one tweet claimed that he tested negative. The speed at which information flies around may indirectly be spreading confusion at a volatile time.

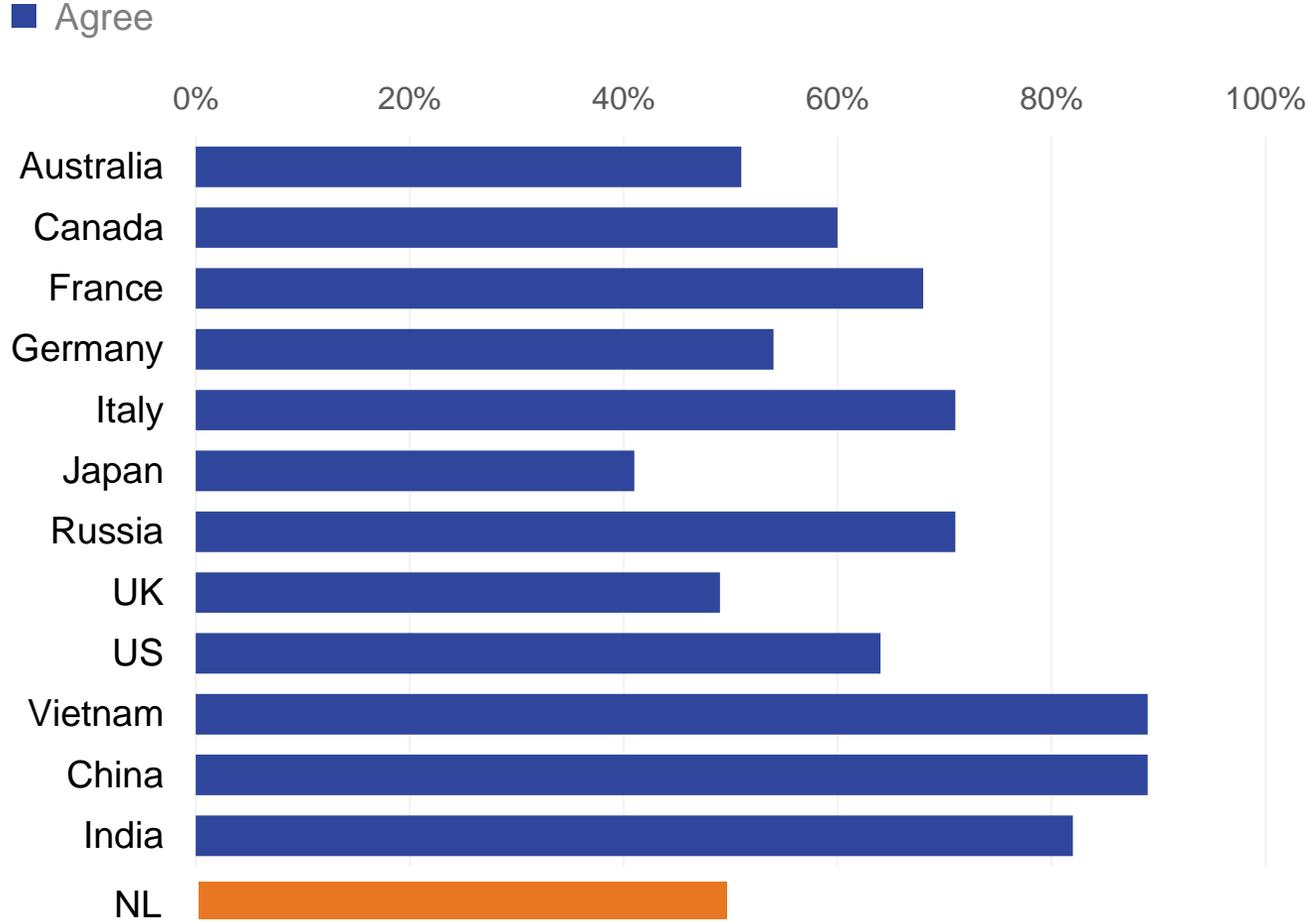


# A FAST-CHANGING CLIMATE OF OPINION

## Back to normal?



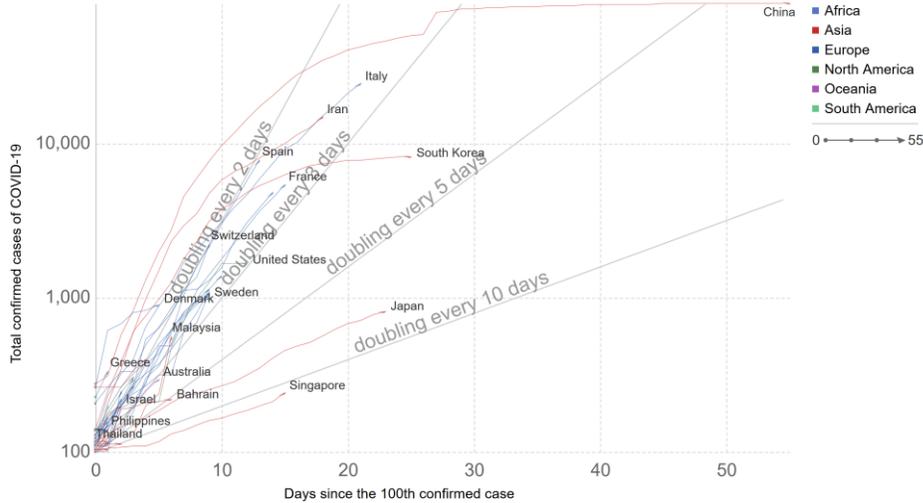
# MAJORITIES IN MOST COUNTRIES ARE OPTIMISTIC THAT THINGS WILL RETURN TO NORMAL BY JUNE, DESPITE TRAJECTORIES SHOWING THE OPPOSITE



© Ipsos

## Total confirmed cases of COVID-19

The starting point for each country is the day that country had reached 100 confirmed cases. This allows us to compare the trajectory of confirmed cases between countries. Because of limited testing the number of confirmed cases is lower than the number of total cases.



Source: WHO COVID-2019 Situation Reports

OurWorldInData.org/coronavirus • CC BY

I expect things to return to normal by June



# UNTIL THEN; THE NEW NORMAL IN THE NETHERLANDS

30% in quarantine

69% agree to heavy fines

46% delaying major purchases

45% watching more Netflix

**ThuiswerkScan** © Ipsos 2020

**Hoe ervaren uw medewerkers thuiswerken in de huidige situatie?**

In deze tijd van crisis zijn uw familie en vrienden natuurlijk het belangrijkste; direct gevolgd door uw klanten en medewerkers.

Voor uw klanten is het belangrijk dat u bereikbaar voor ze bent en blijft. Voor uw medewerkers is het van groot belang dat ze hun werk in deze moeilijke tijden goed kunnen blijven doen.

Om inzicht te krijgen in de mate waarin uw medewerkers zich gesteund voelen en optimaal in staat zijn thuis te werken heeft Ipsos de Thuiswerkscan ontwikkeld.

**Hoe werkt het?**

In slechts 3 stappen een helder beeld van de thuiswerkervaring van uw medewerkers.

- 1 Een kant en klare vragenlijst met eventueel toevoeging van 1 vraag specifiek voor uw organisatie.
- 2 Benader zelf uw medewerkers met behulp van een link naar het onderzoek en onze standaard uitnodigingsmail.
- 3 Snel na afronding van het veldwerk, ontvangt u de inzichten in een pakkende **factsheet**.

# **A FAST-CHANGING CLIMATE OF OPINION**

**examples from other  
countries**

# SPOTLIGHT on France

## Reacting to the lockdown



GAME CHANGERS

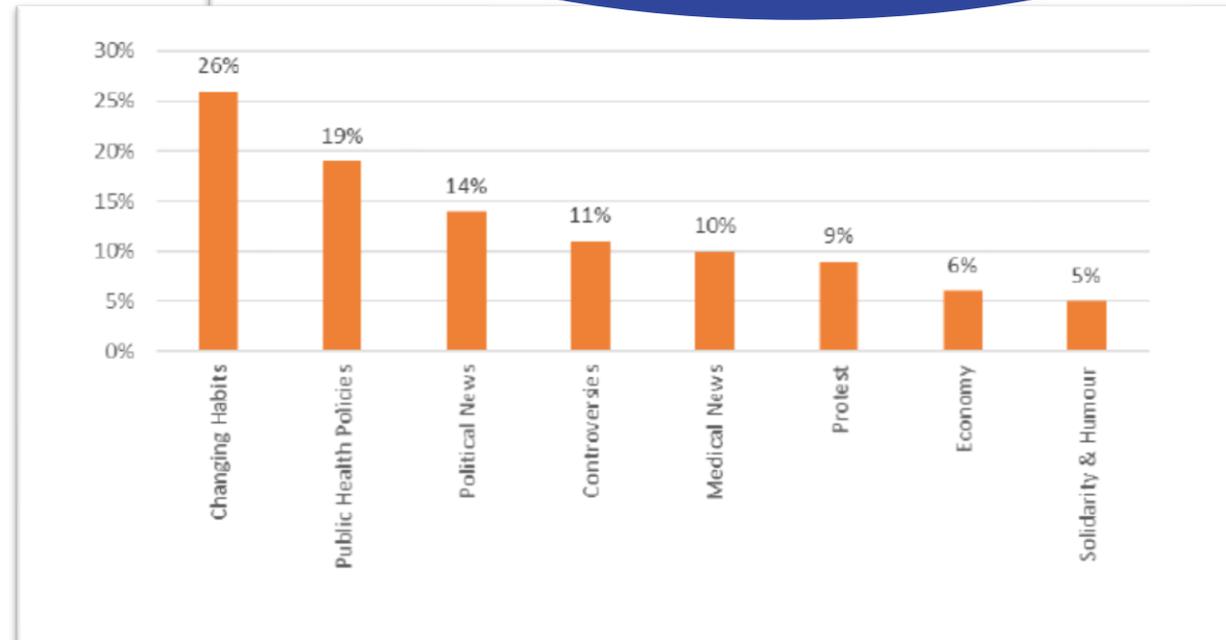


# RESPONDING TO SOCIAL ISOLATION WITH SOCIAL NETWORKS

- Imposition of self-isolation on 17 March is accompanied by highest level of social media traffic **for 30 days**
- 300,000 posts, 740,000 retweets
- One in four posts are around the consequences on daily life
- Follow the links for the analysis in [French](#) and [English](#).

“It appears as though the French were responding to the loss of freedom of movement by moving to a place of virtual expression and exchange: **‘total isolation’ is synonymous with ‘social network’**”

Netherlands; 41% of people say they increased their use of social media



# SPOTLIGHT on Spain

Self-  
assessments  
during the  
lockdown

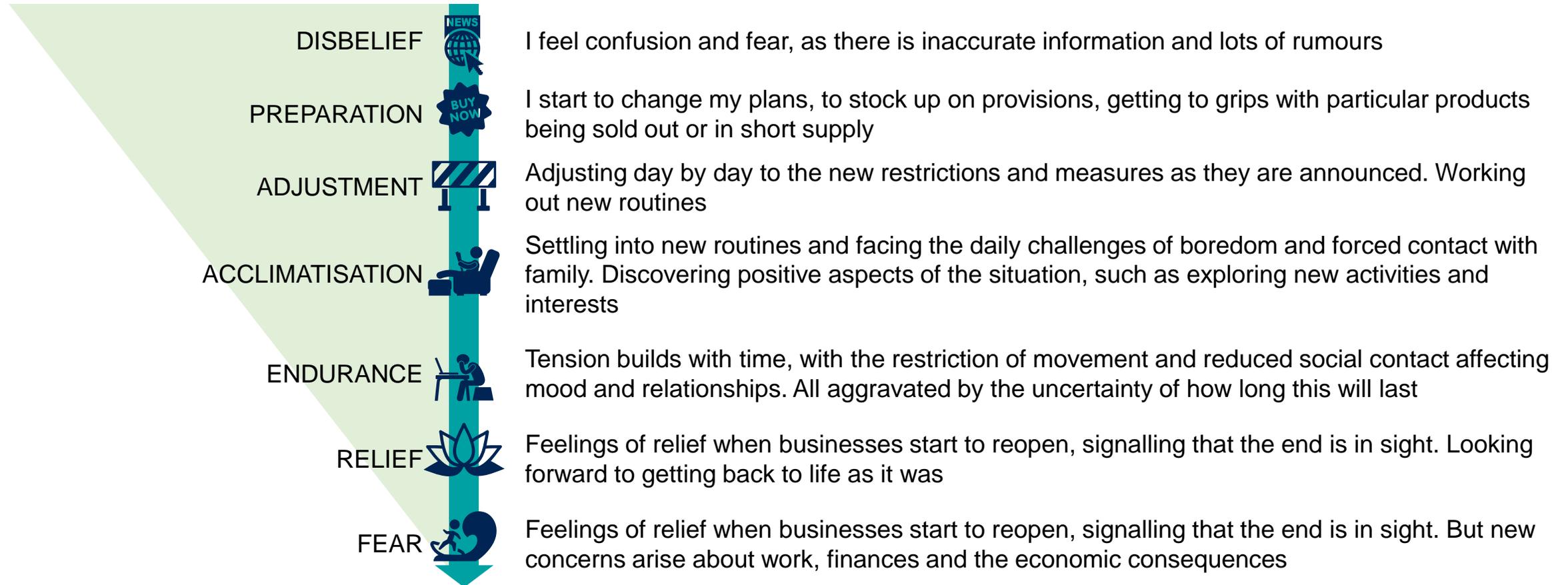


GAME CHANGERS



# THINKING ABOUT WHERE WE ARE TODAY

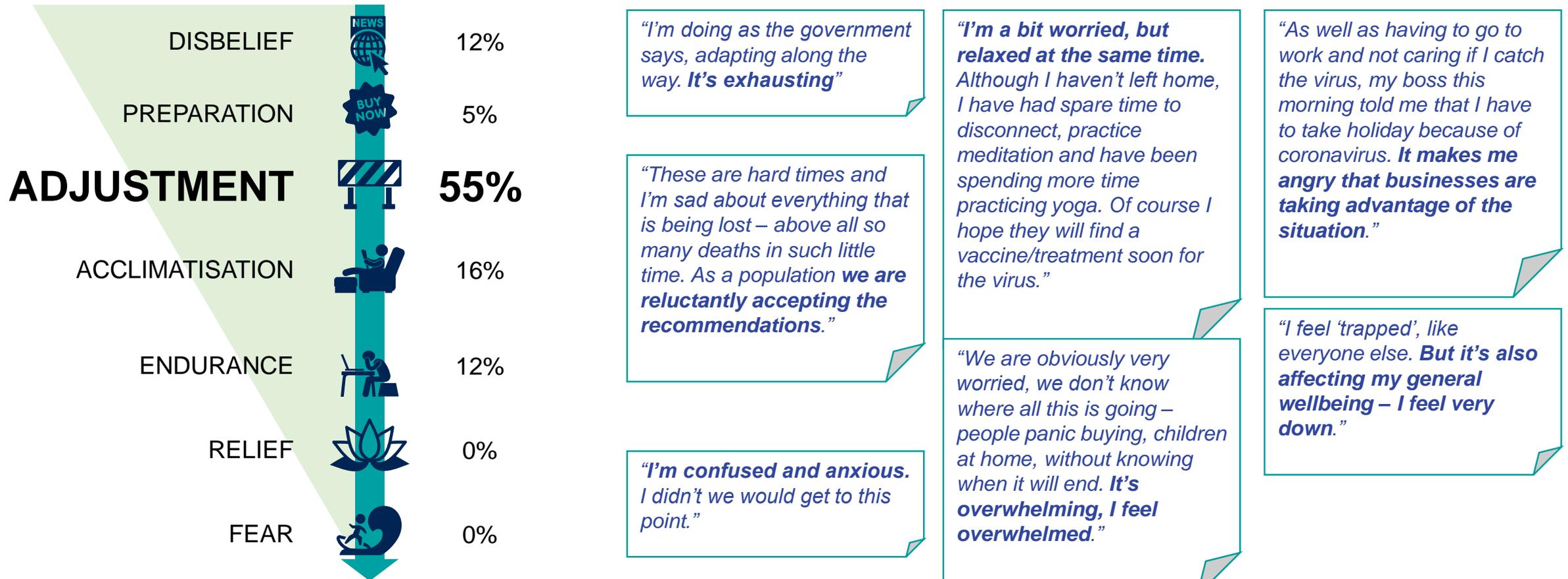
One way to look at the key stages of the journey through an epidemic.



# SPAIN FINDS ITSELF IN THE “ADJUSTMENT” PHASE

## Adapting to the situation and working out new routines

| 19 Marzo 2020 |



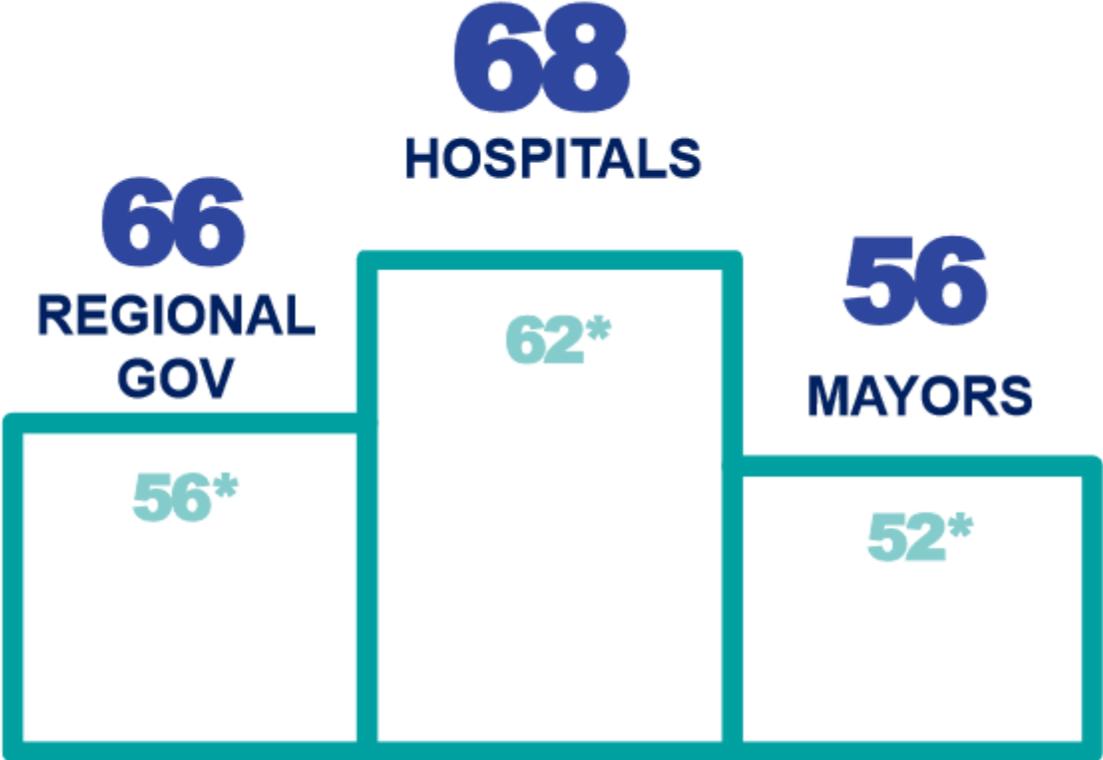
From the experiences of people in other countries, we see some key stages moving through the journey of the Covid-19 pandemic. Which phrase best describes how you are feeling today? Base: 557 participants. Ipsos W&W Community en España.

# SPOTLIGHT on Italy

Looking outside  
the EU for help

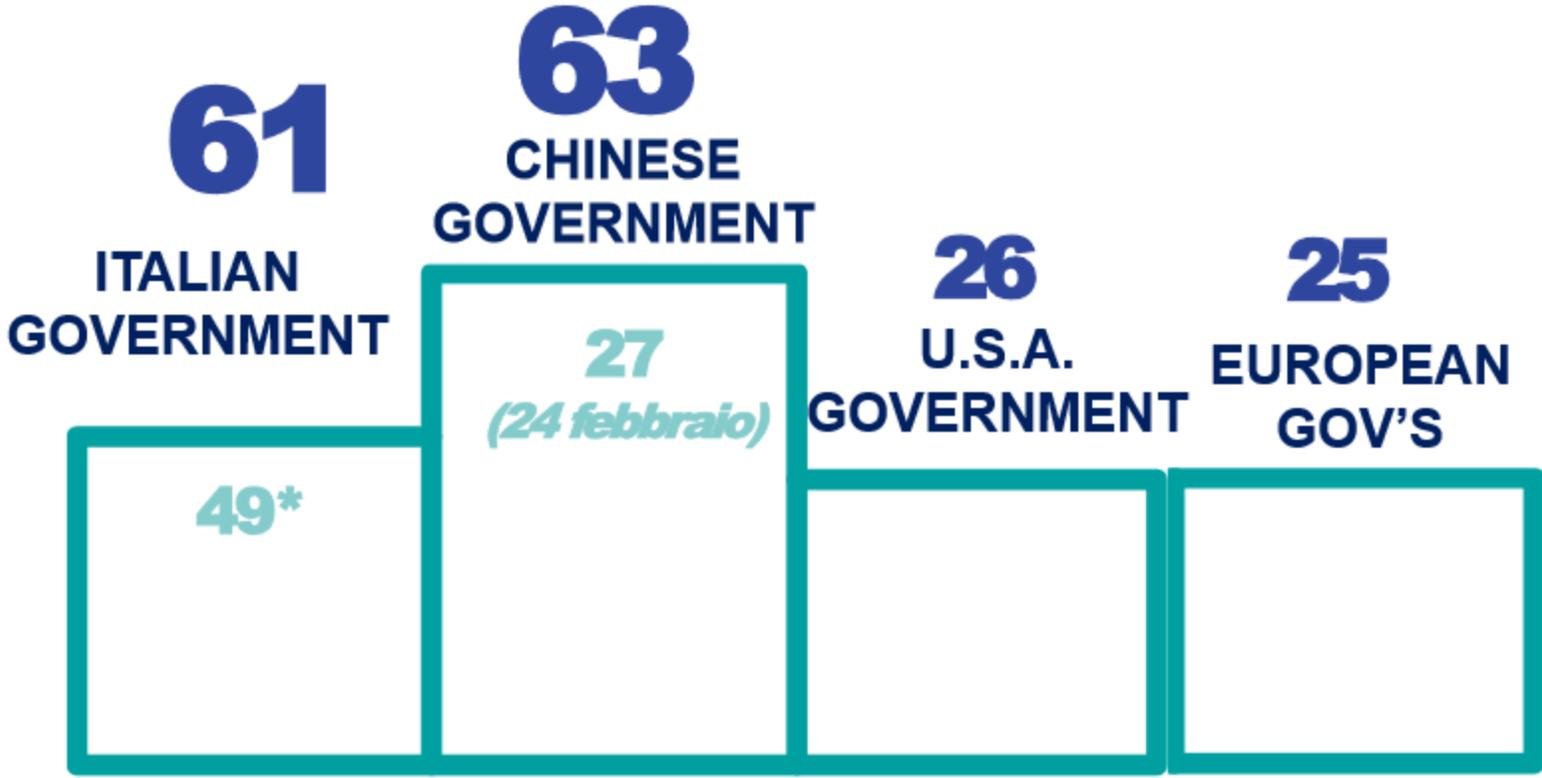


# HOSPITALS AND (LOCAL) GOVERNMENT STILL TRUSTED...



% effective in controlling the spread

# BUT LITTLE TRUST IN EU, MORE TRUST IN CHINESE MEASURES



% effective in controlling the spread

\* POLL 10-12 MARCH 2020

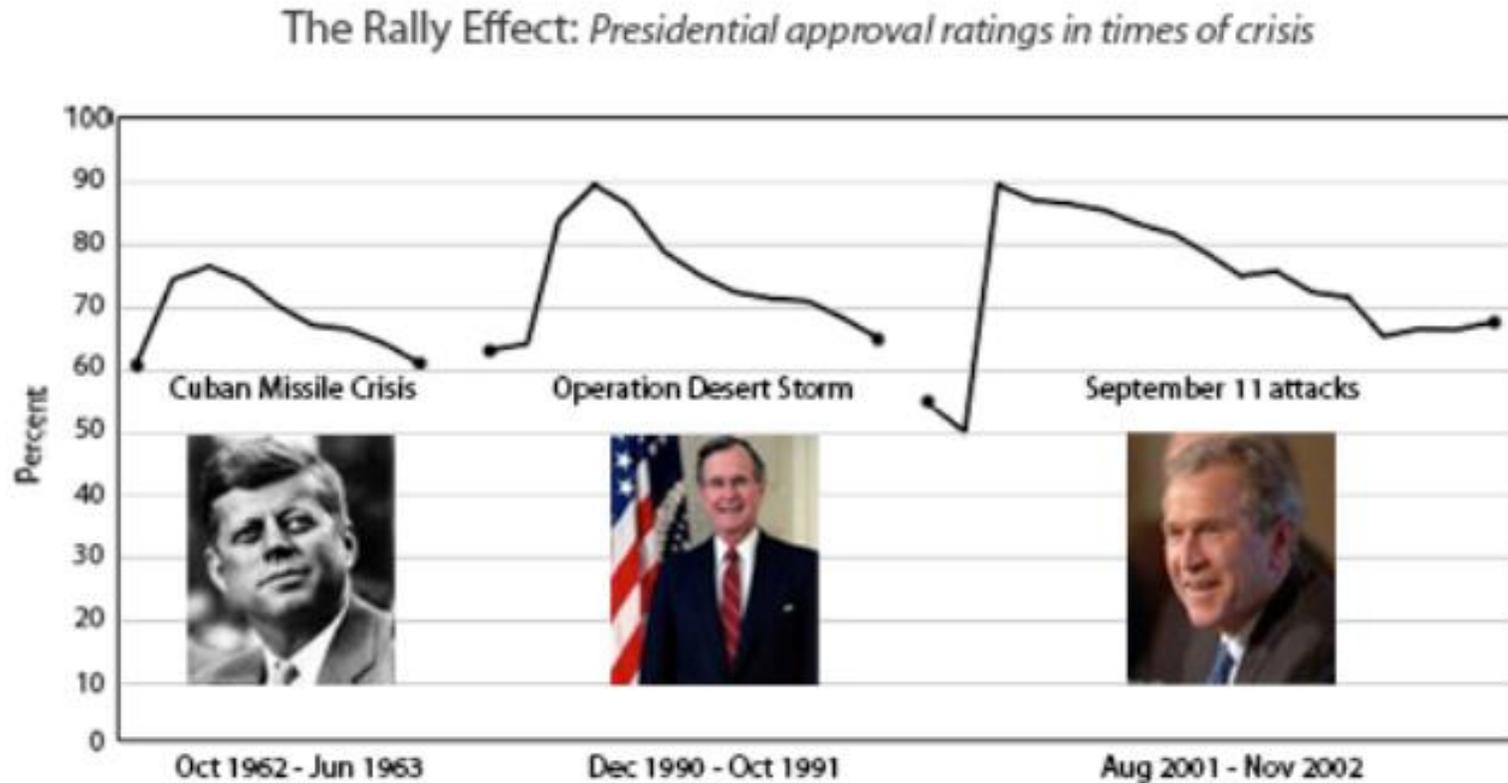


# FIRST SIGNALS OF COVID-19 IMPACT ON DUTCH PUBLIC OPINION

# RALLY AROUND THE FLAG



# RALLY AROUND THE FLAG

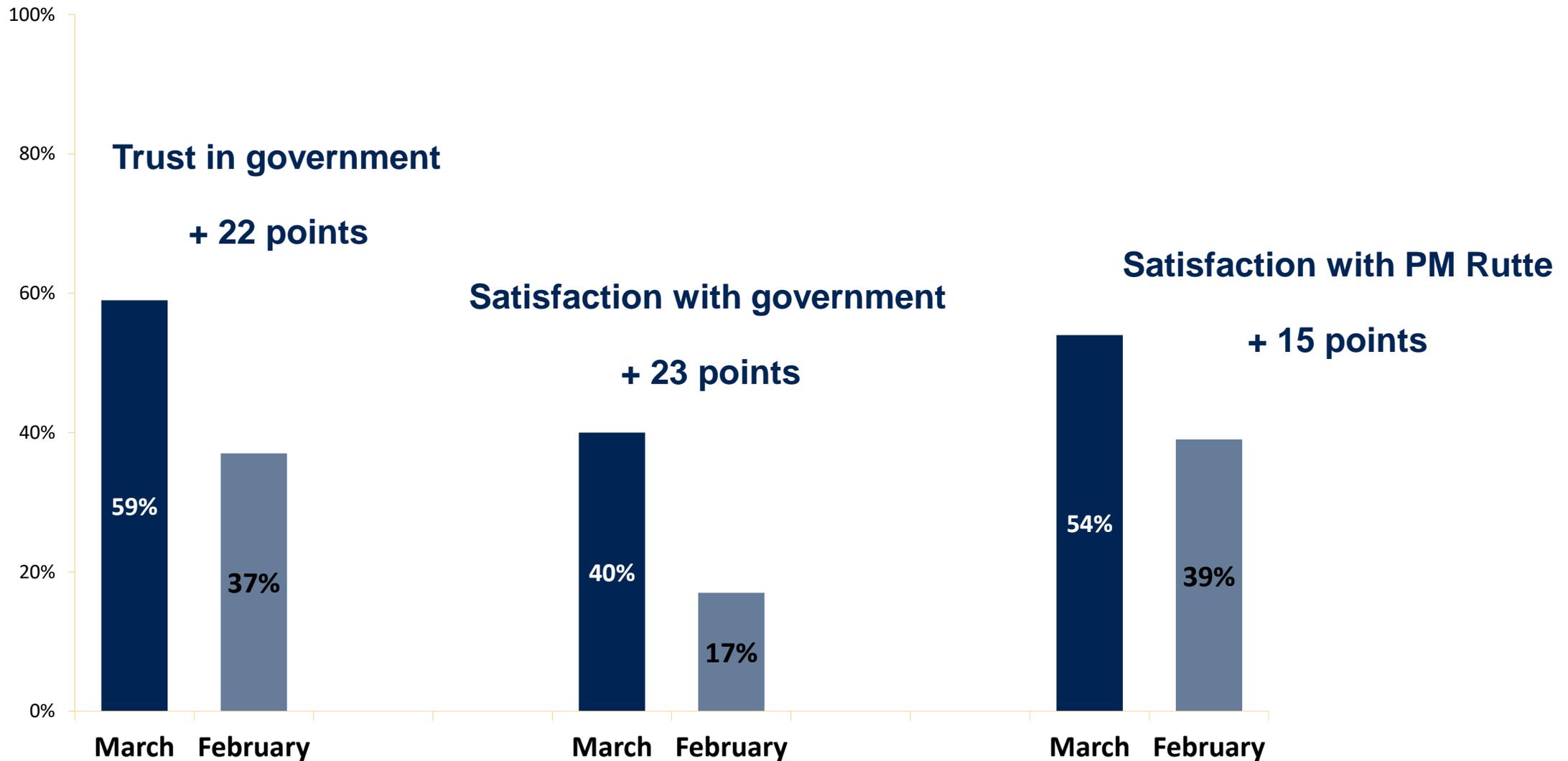


WUSTL graphic

- Mostly an American phenomenon
- Surge in support for presidents
- Usually short-term

Source: <https://source.wustl.edu/2010/06/anger-drives-support-for-wartime-presidents/>

# RALLY AROUND THE FLAG



# RALLY AROUND THE FLAG

	FEB-20 SEATS	MAR-20 SEATS	Δ
VVD	27	35	+8
PVV	18	15	-3
CDA	14	14	
D66	13	13	
GL	15	14	-1
SP	7	7	
PvdA	14	15	+1
CU	6	6	
PvdD	6	6	
50Plus	10	10	
SGP	3	3	
DENK	2	2	
FvD	15	10	-5

# CHANGES IN THE POLITICAL AGENDA



# CHANGES IN THE POLITICAL AGENDA



## Short-term

### Top 5 issues for voters

**MAR-20**

1. Healthcare	59%	<b>+19 points</b>
2. Coronavirus	57%	
3. Education	21%	<b>-12 points</b>
4. Climate change	20%	<b>-22 points</b>
5. Jobs	18%	<b>+9 points</b>

# CORONAVIRUS: The story so far

1

**CORONAVIRUS  
BECOMES  
REAL**

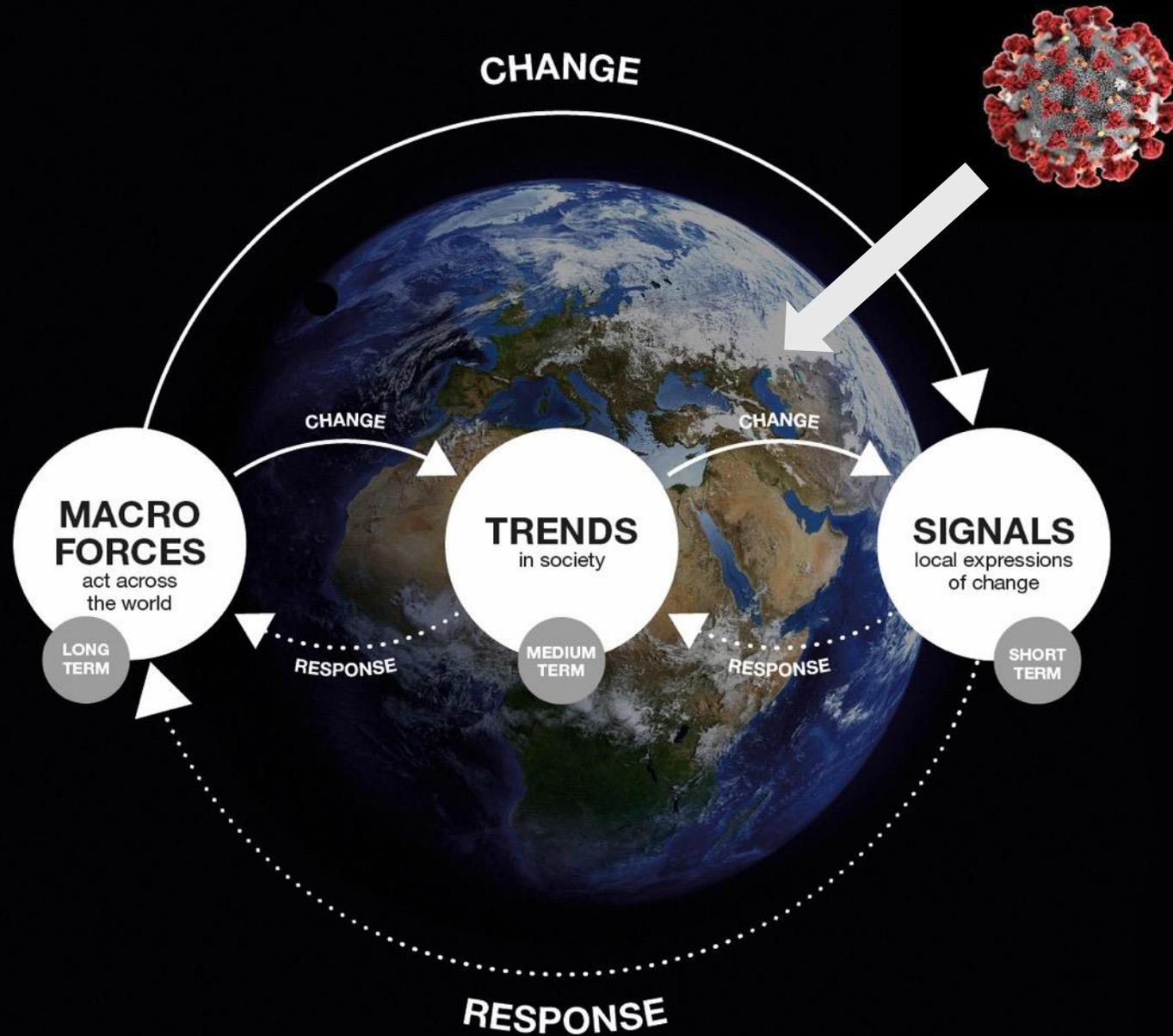
2

**A FAST  
CHANGING  
CLIMATE OF  
OPINION**

3

**CHANGING  
BEHAVIOURS:  
The early signs**

# Making sense of events

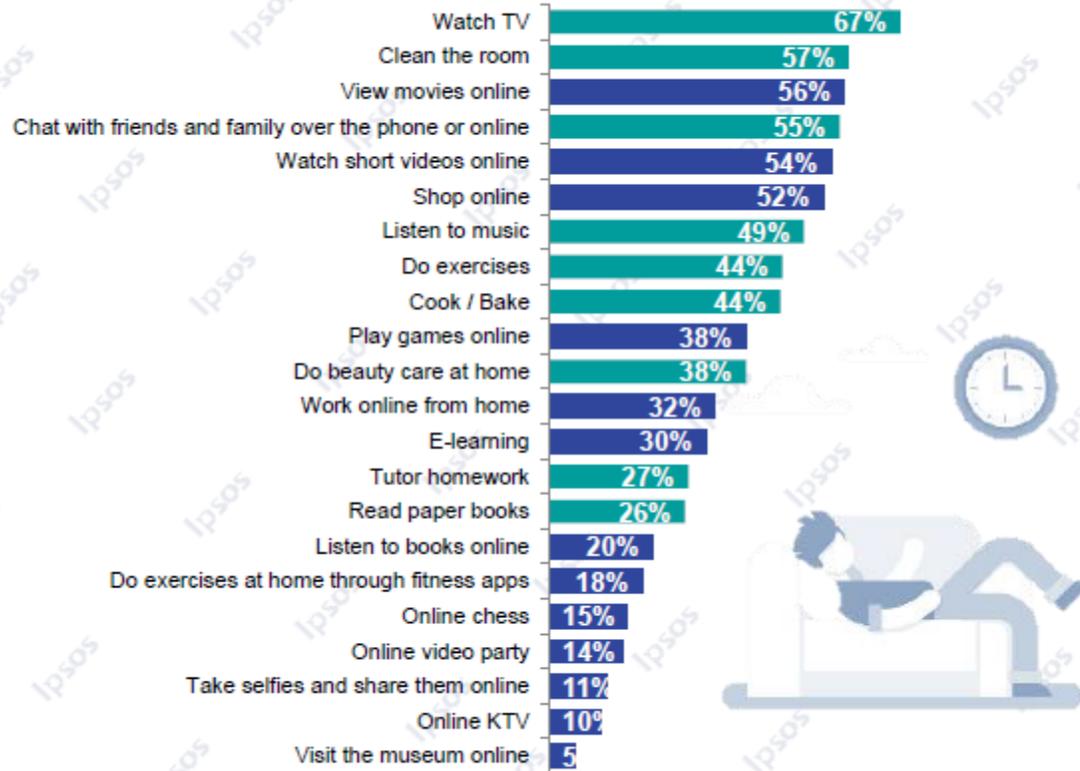


## A 'shock' to the eco-system!

Covid-19 has produced a tsunami of new signals that are impacting life now and may result in impending change to our future societies.

# LOTS OF ACTIVITIES SWITCH TO ONLINE, WHAT DOES THIS MEAN FOR THE FUTURE?

## Activities at home from the first to the twentieth day of the New Year



## Things to cheer you up at home during the Spring Festival? (Excerpted from the network)

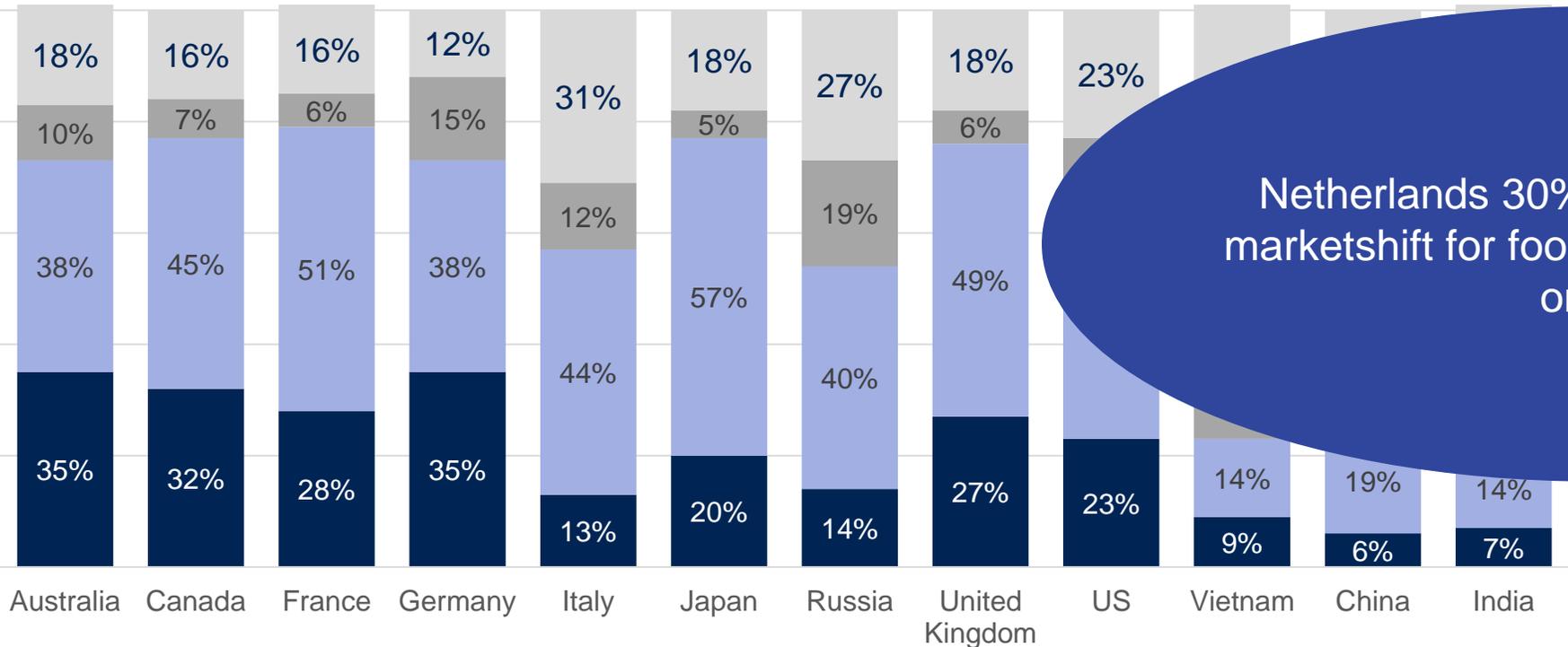
"It's a fine day today, so why not go to the living room for a walk?"

"TV and TV again, and I gain enormous weight eating all these snacks."

Extroverts can **shoot the breeze** with their friends and introverts can **watch TV, play games, or read books** at home. Those with hobbies can enjoy themselves right now, and those without can pick up some. Foodies can **cook**, and those fond of drinks can buy a juicer and make some novel drinks. "

# A REPORTED RISE IN E-COMMERCE IN CHINA AND ITALY IN PARTICULAR – SIGN OF THINGS TO COME IN OTHER COUNTRIES?

*Using e-commerce to purchase products you would normally buy in-store*

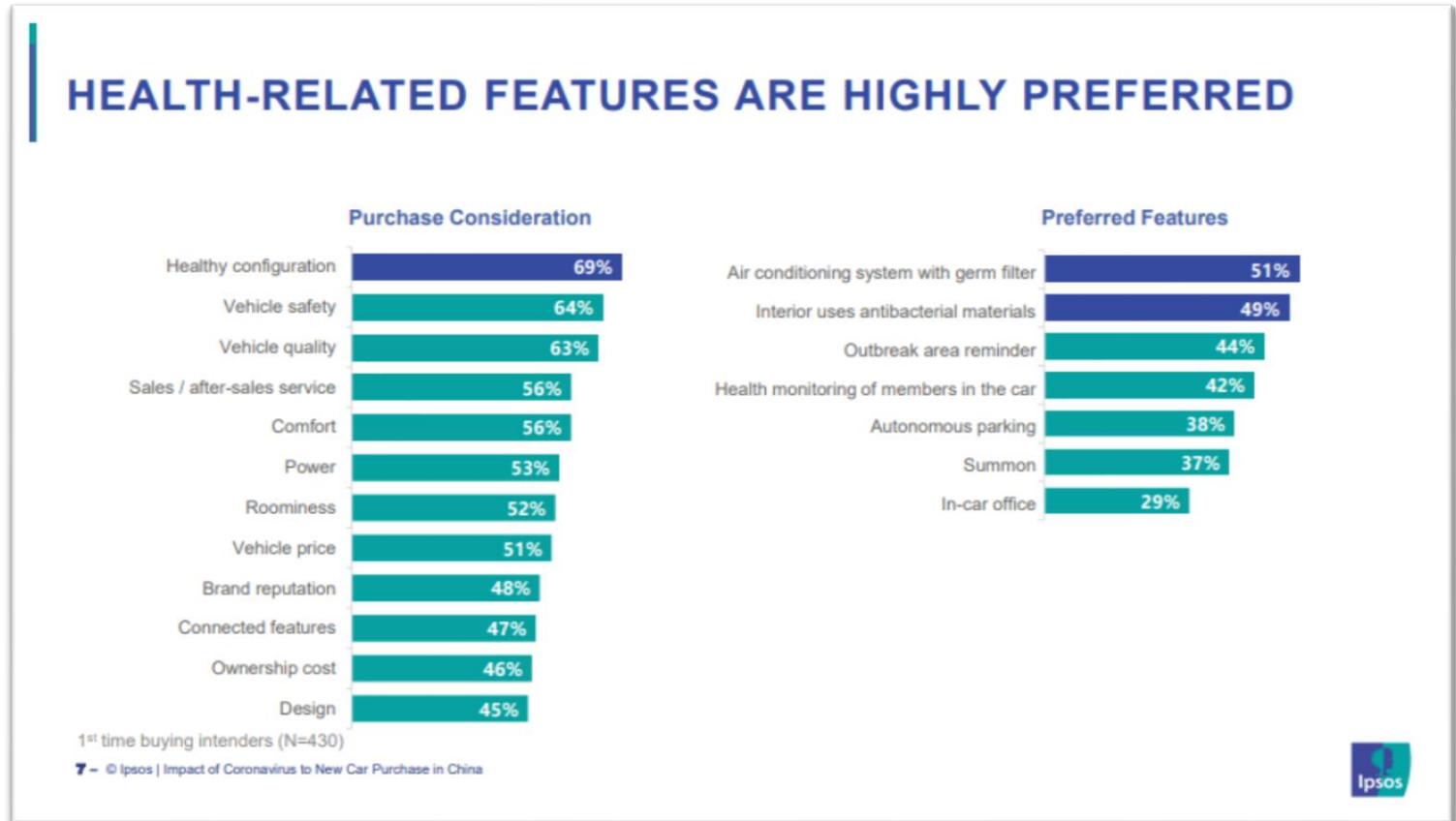


Netherlands 30%, but also potential marketshift for food, 28% buy this more online

*What about each of the following, would you say are doing each of the following more frequently or less frequently compared to one month ago?*

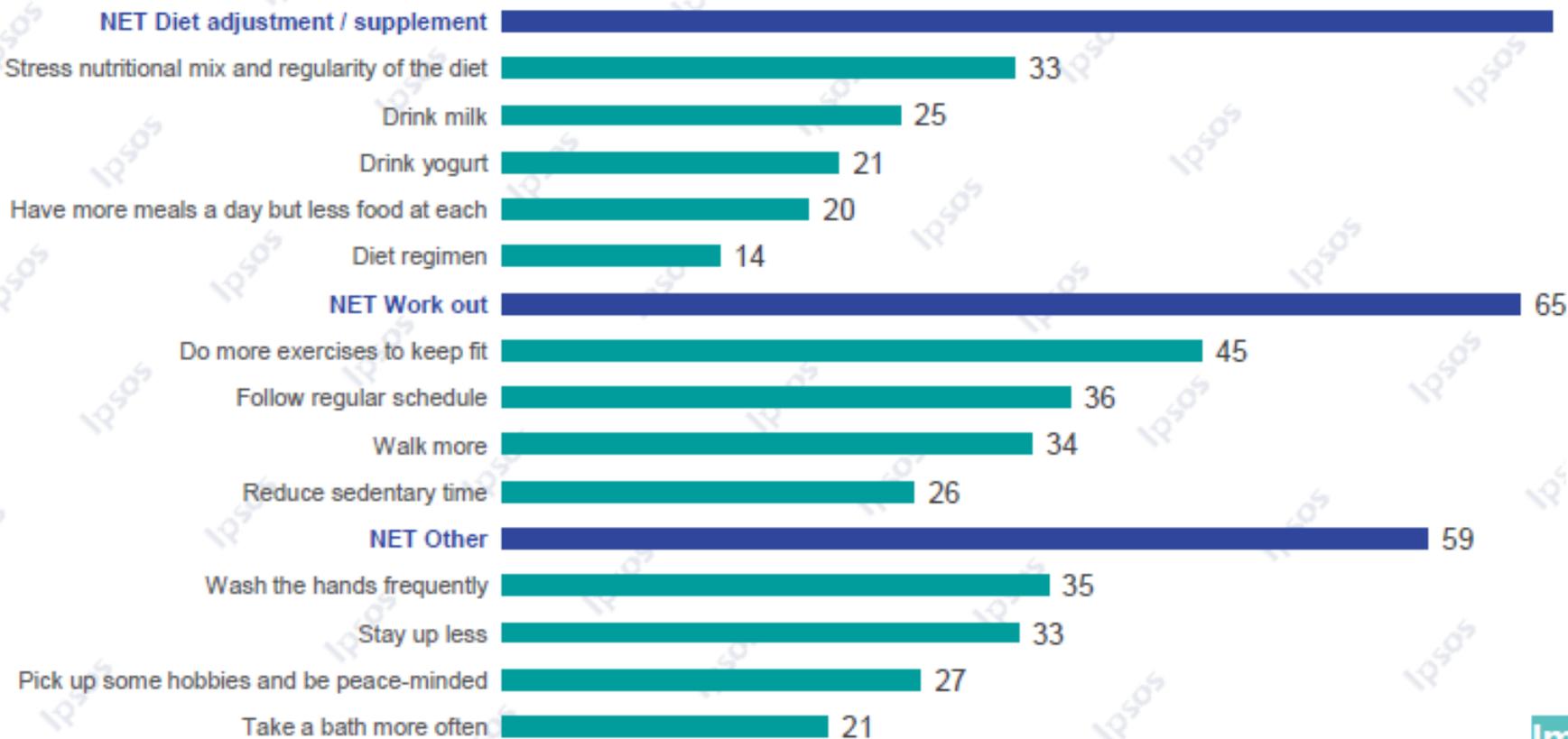
# CHANGING BEHAVIOURS (EARLY SIGNS?): CHINA CASE STUDY

- Survey across China
- **24 February**
- A shift towards **using private cars**
- Enhanced intention to **buy a car**
- *Sales channels:* More interested in **door-to-door test drive** and **car delivery**
- *Important attributes:* **Health-related features**
- Access the report [here](#)



# MORE HEALTHIER LIFESTYLE?

## What measures will you take in the future to improve your daily health?





# CORONAVIRUS AND BEHAVIOR CHANGE

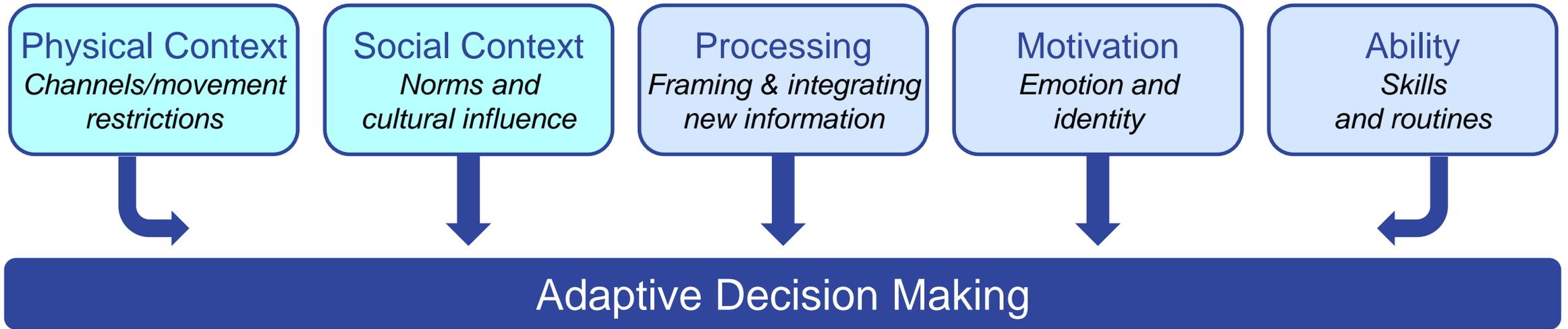
What does it mean for brands?

GAME CHANGERS



# CORONAVIRUS MEANS FLUID TIMES

Consumer decision-making and behavior adapts based on **individual** and **contextual** characteristics.  
In a fluid time, it is harder to depend on automatic behaviors that may reflect mastery of a past that no longer exists.



# HOW SHOULD BRANDS RESPOND?

*“Brands are **nervous about appearing to profit** from this crisis. The conversation is being had in many client and agency organizations, but they have to **be absolutely sure** they are helping people not just making money from it, or being seen to make money from it.”*

Owen Lee, Chief Creative Officer  
FCB Inferno (*The Drum*)

# RISING TO THE OCCASION

WAYS BRANDS CAN HELP PEOPLE ADAPT TO A SHIFTING CONTEXT AND SUPPORT BEHAVIORAL CHANGE



# ABN•AMRO

## ABN AMRO doneert 2000 laptops

In de opgave om alle kinderen onderwijs op afstand te kunnen laten volgen, doneert ABN AMRO in samenwerking met IBM en CompuCenter 2000 laptops aan het Jeugdeducatiefonds.

[Lees daarover dit artikel.](#)

# RISING TO THE OCCASION

WAYS BRANDS CAN HELP PEOPLE ADAPT TO A SHIFTING CONTEXT AND SUPPORT BEHAVIORAL CHANGE



▲ De productie van handalcohol in de Bavaria-brouwerij in Lieshout. © Handgel Bavaria

**Bij Bavaria stroomt nu de handgel uit de kranen: 'Iedereen werkt mee,**



# RISING TO THE OCCASION

WAYS BRANDS CAN HELP PEOPLE ADAPT TO A SHIFTING CONTEXT AND SUPPORT BEHAVIORAL CHANGE

## **Boeken en verhalen** voor alle thuisblijvertjes

Ze kosten bijna niets: maar 1 cent per digitaal boek



# RISING TO THE OCCASION

WAYS BRANDS CAN HELP PEOPLE ADAPT TO A SHIFTING CONTEXT AND SUPPORT BEHAVIORAL CHANGE

## Helping to protect lives and livelihoods from the Covid-19 pandemic

24/03/2020

**Unilever contributes more than €100m to continue helping people affected around the world**

*London/Rotterdam.* Unilever, the consumer goods manufacturer of brands including Dove, Knorr, Omo and Lifebuoy, today announced a wide-ranging set of measures to support global and national efforts to tackle the coronavirus (Covid-19) pandemic.

The company's actions are designed to help protect the lives and livelihoods of its multiple stakeholders – including its consumers and communities, its customers and suppliers, and its workforce.



# RISING TO THE OCCASION

## WAYS BRANDS CAN HELP PEOPLE ADAPT TO A SHIFTING CONTEXT AND SUPPORT BEHAVIORAL CHANGE

### **Franse automobilist mag kiezen: premie terug of doneren aan zorgverleners**

De Franse verzekeraar MAIF heeft vanochtend een opmerkelijke mail aan zijn klanten gestuurd. Vanwege de beperkende maatregelen in Frankrijk gebeuren er veel minder auto-ongelukken in het land dan normaal. Daardoor heeft het bedrijf naar schatting zo'n honderd miljoen euro minder hoeven uitkeren dan normaal en is er geld over.

Klanten van MAIF zijn daarover per mail op de hoogte gebracht en kunnen binnenkort zelf een keuze maken. Ze hebben de mogelijkheid om een deel van de premie terug te krijgen, maar kunnen ook zorgverleners in ziekenhuizen ondersteunen, bijdragen aan sociale projecten of het geld stoppen in onderzoek naar onder meer vaccins.

# RISING TO THE OCCASION

WAYS BRANDS CAN HELP PEOPLE ADAPT TO A SHIFTING CONTEXT AND SUPPORT BEHAVIORAL CHANGE (OR NOT)

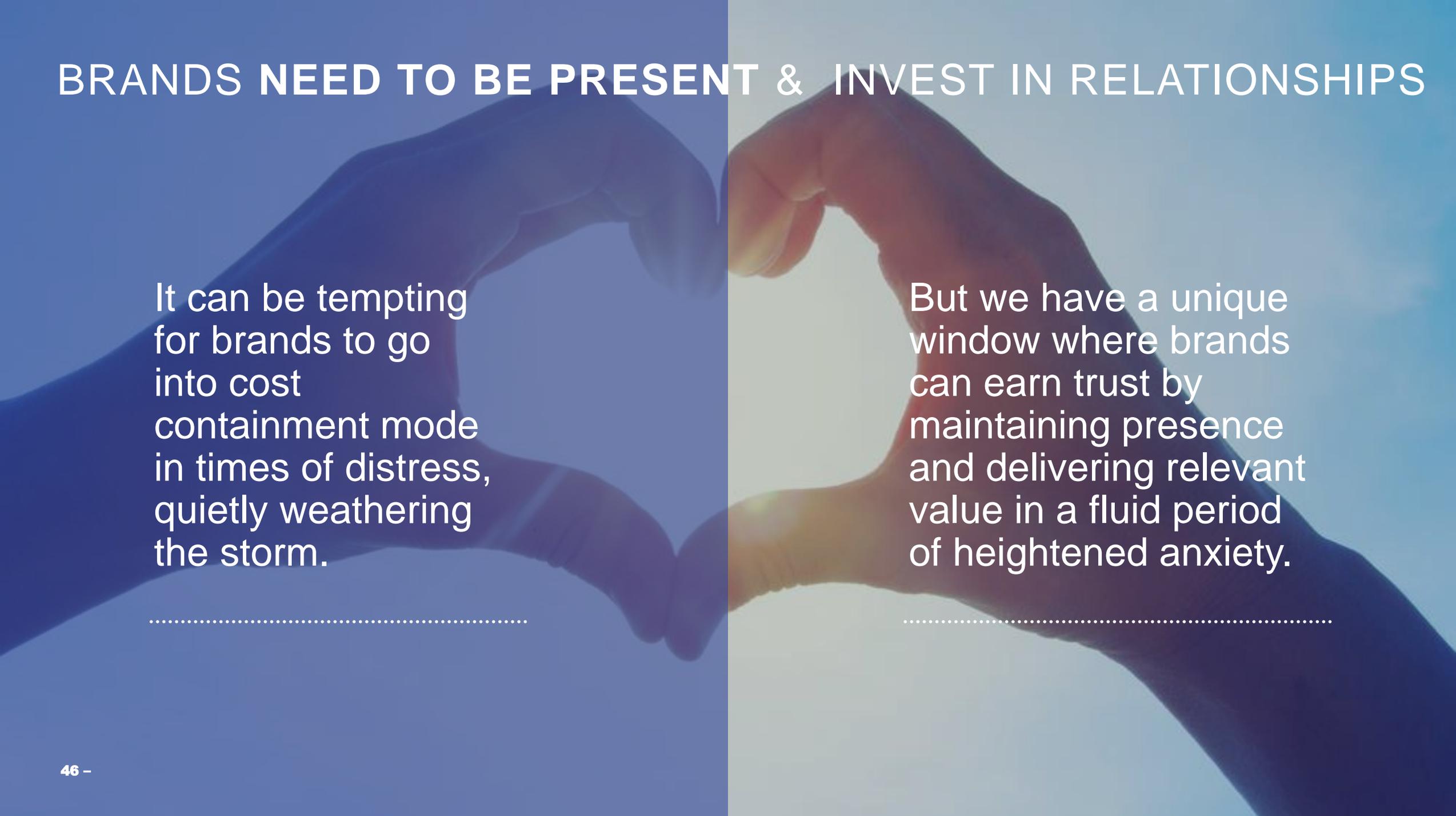
## Hoe Rumag zijn rebellenimago met een paar persberichten om zeep helpt

Verongelijkte en klagende toon staat in schril contrast met de stoere woorden daarvoor.

PR © 30 MARCH 2020 👤 CHANTAL DEEN



# BRANDS NEED TO BE PRESENT & INVEST IN RELATIONSHIPS

The background of the slide features two hands, one from the left and one from the right, reaching towards each other and holding each other's fingers. The hands are silhouetted against a light, warm-toned background that transitions from a pale yellow at the top to a soft blue at the bottom. The overall mood is one of connection and support.

It can be tempting for brands to go into cost containment mode in times of distress, quietly weathering the storm.

---

But we have a unique window where brands can earn trust by maintaining presence and delivering relevant value in a fluid period of heightened anxiety.

---

# AMPLE OPPORTUNITIES FOR COMMERCIAL BREAKTHROUGH

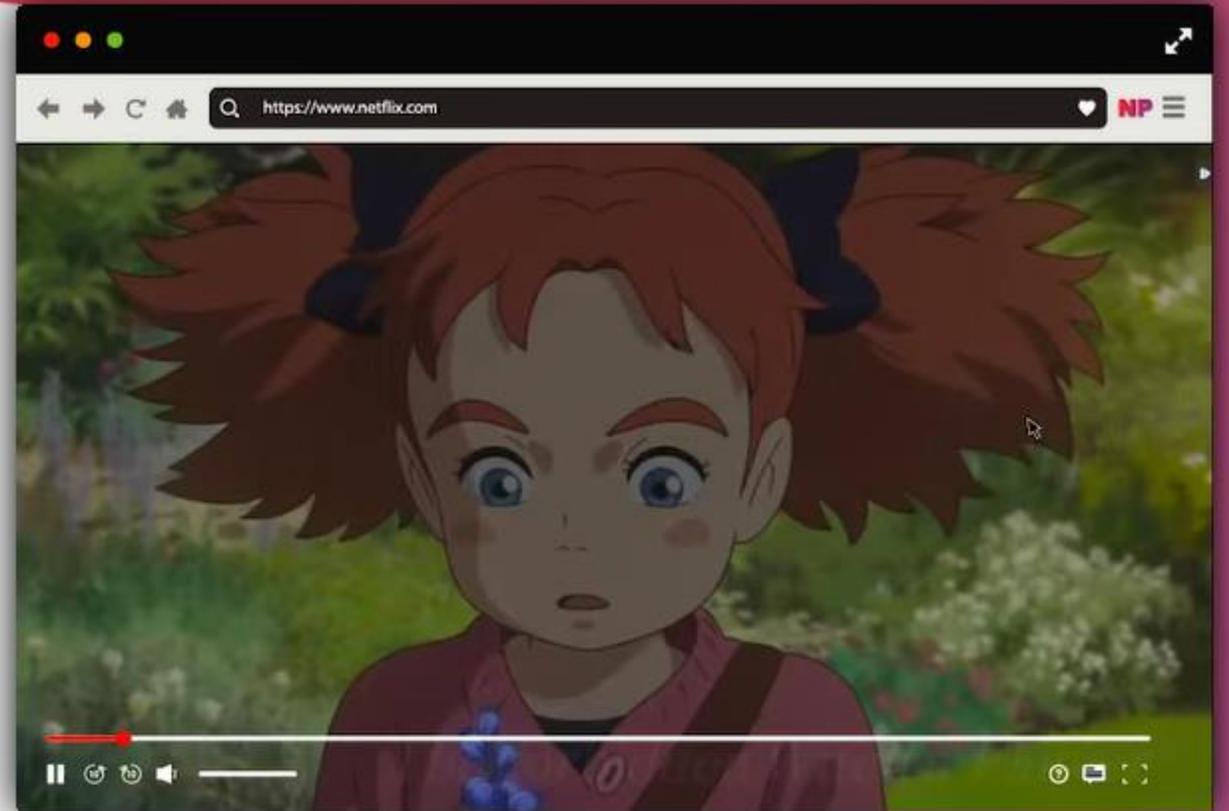
## A new way to watch Netflix together

Netflix Party is a new way to watch Netflix with your friends online. Netflix Party synchronizes video playback and adds group chat to your favorite Netflix shows.

Join over 1,000,000 people and use Netflix Party to link up with friends and host long distance movie nights and TV watch parties today!

Get Netflix Party for free!

\*ONLY available on Chrome browsers on desktop or laptop computers.



# LAST BUT NOT LEAST; CHANGES IN DUTCH SOCIETY TO BE EXPECTED

## Medium-term / Long-term

### 1. Return of *Big Government*?

- healthcare investments
- bail-out efforts
- wealth redistribution



# LAST BUT NOT LEAST; CHANGES IN DUTCH SOCIETY TO BE EXPECTED

## Medium-term / Long-term

### 2. Globalisation debate

- COVID-19 as a global crisis, or a crisis of globalisation?
- Trump: 'Chinese virus'



# LAST BUT NOT LEAST; CHANGES IN DUTCH SOCIETY TO BE EXPECTED

## Medium-term / Long-term

### 3. Privacy debate

- Governments keeping tabs on the outbreak, but also on citizens?
- Data sharing and the power of Big Tech



# SIGNALS

Understanding the  
coronavirus crisis

3 April 2020

AN IPSOS WEBINAR

Eric Landwaart Chief Client officer  
Maaïke Goes Head of Marketing

GAME CHANGERS

