

# SIGNALS

Understanding the  
coronavirus crisis

23 April 2020

AN IPSOS WEBINAR

GAME CHANGERS



# AGENDA

## Understanding the coronavirus crisis

### INTRODUCTION

**Jennifer Hubber**, Head of Ipsos Global Client Organization

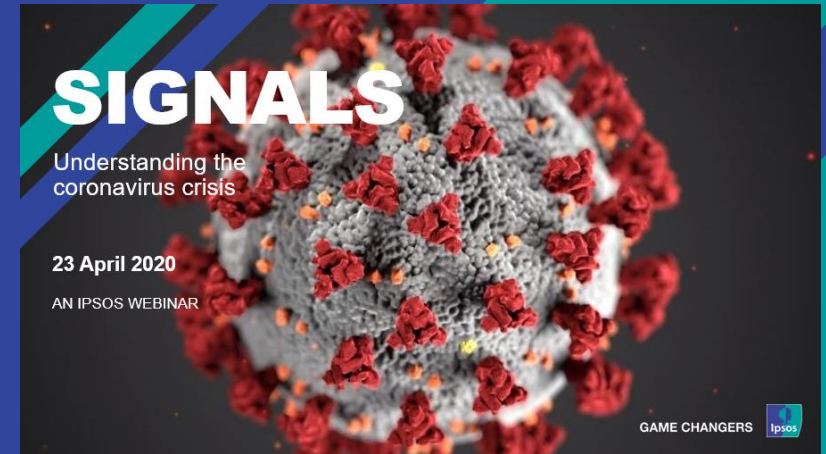
**PERCEPTIONS & ATTITUDES: The story so far**  
**Simon Atkinson**, Chief Knowledge Officer and  
**Katharine Zhou**, Country Manager, Ipsos in Singapore

### BRAND GROWTH IN TIMES OF CRISIS

**Benoit Tranzer**, Global Service Line Leader,  
Brand Health Tracking

### GET READY FOR THE NEW RETAIL NORMAL

**Alison Chaltas**, Global President, Shopper and Retail



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SIGNALS WEBINARS HERE:  
[26 March](#) and [8 April](#)**

# PERCEPTIONS AND ATTITUDES: The story so far

1

**Simon Atkinson**  
Chief Knowledge Officer

# CORONAVIRUS: The story so far

1

**WHERE ARE  
WE TODAY?**

**The Current  
Climate of  
Opinion**

2

**KEEPING IN  
TOUCH**

**Resources from  
Ipsos**

3

**WHERE ARE  
WE HEADING?**

**Mapping the  
Different Phases**

4

**TAKING  
STOCK**

**The Singapore  
Experience**

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# WHICH THREE OF THE FOLLOWING DO YOU FIND MOST WORRYING IN YOUR COUNTRY? **APRIL 2020**



**NEW ADDITION: Coronavirus/covid-19**

**61%**

**highest single score since the survey started in 2010  
#1 issue in 24/28 countries**

**17 categories, runs monthly, 28 countries**

***Top 5 issues in “normal times”***

Unemployment, Healthcare, Poverty & Social Inequality,  
Financial/Political Corruption, Crime & Violence

19,505 interviews in 28 countries, 20 March – 3 April 2020





# Tracking the Coronavirus

A 15-COUNTRY PERSPECTIVE

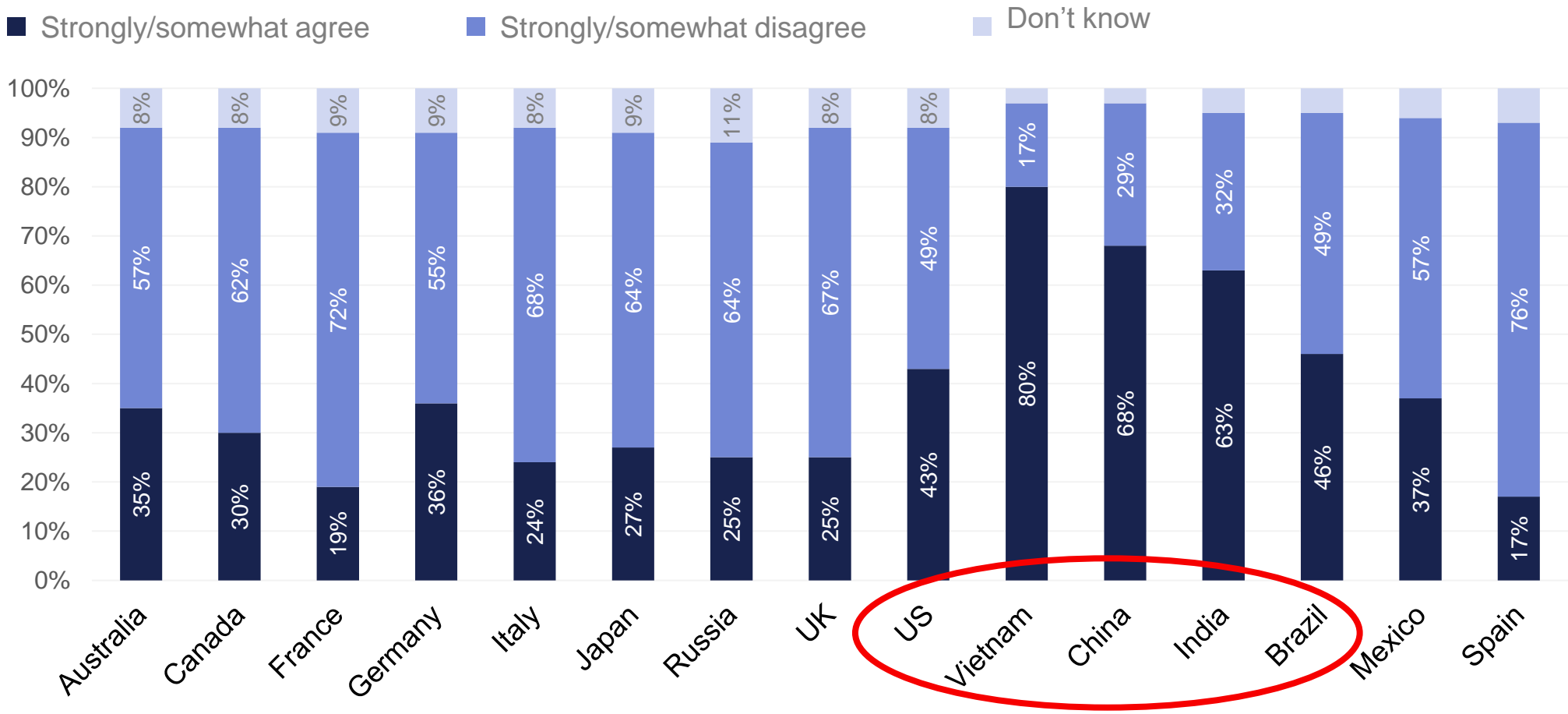
GAME CHANGERS



# HOW LONG WILL THE RECOVERY TAKE?



Ipsos' *Global Consumer Confidence Index* at lowest levels for years



Q: Do you agree or disagree with the following:  
**The economy will recover quickly once the lockdown is over**

Note: Data labels under 8% are not shown



# Face Masks

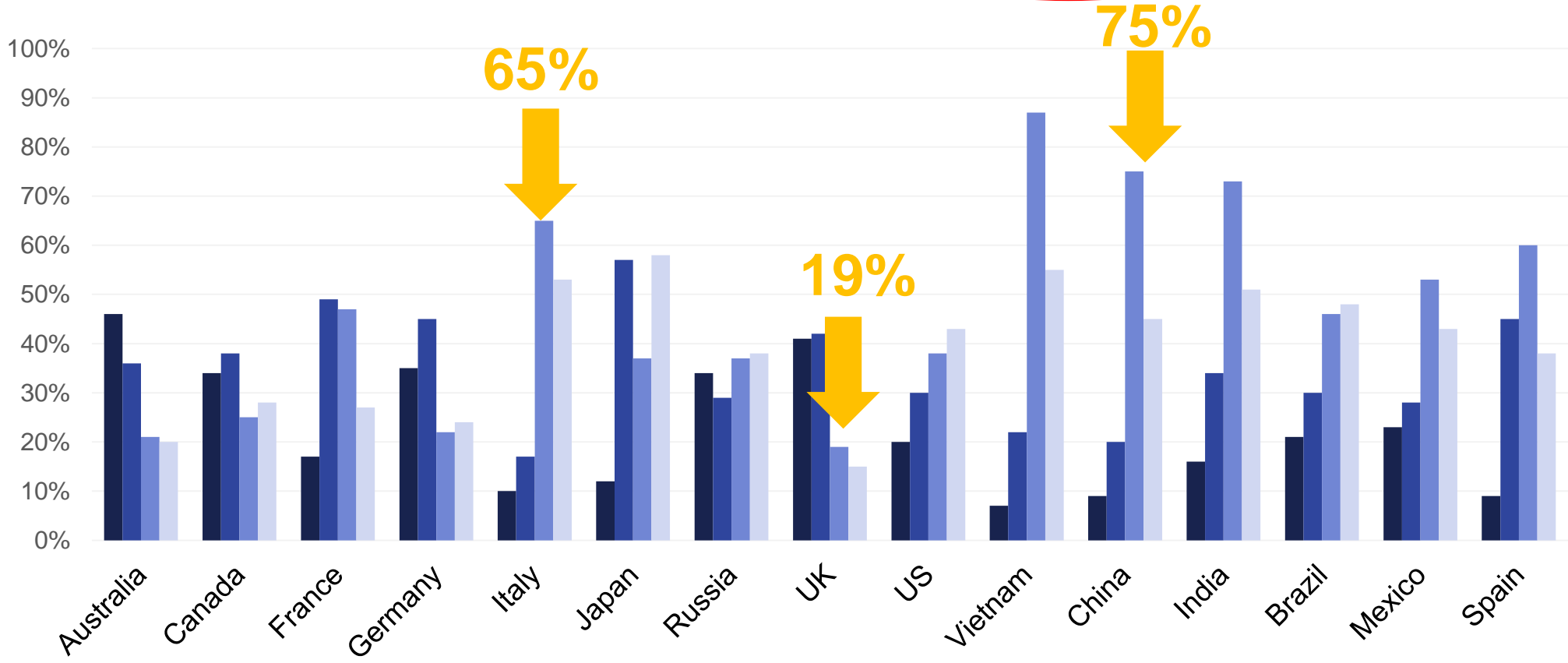
A 15-COUNTRY PERSPECTIVE

GAME CHANGERS



# HOW DO YOU FEEL ABOUT FACE MASKS?

- I don't see the value in wearing a face mask if I am not sick
- Even if I wanted to wear a face mask, I have heard they are not available anywhere or are too expensive
- **People should wear face masks in public even when this pandemic is over to protect others**
- I expect people around me to wear a face mask, so I don't get sick



Q: There has been a lot of focus on the access and use of face masks during this pandemic.  
**Please indicate which of the following applies to you.**

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# RESOURCES FROM IPSOS



## RELIABLE INFORMATION ENABLING BETTER DECISIONS

A period of rapid and unprecedented events requires **context and perspective on perceptions and behaviour changes.**

Ipsos has been conducting a global tracking since early February, **monitoring and understanding drivers of change in six areas :**

- Purchase metrics and intentions
- Social issues and response to actions
- Incidence of counter-measures
- Behavioural and attitudinal measures
- Responsibility and credibility
- Long-term outlook

**#1** Latest opinion research

Visit our **Coronavirus Research** [Home Page](#)

**Twitter** @Ipsos or via **LinkedIn**



**#2** Expert analysis



**#3** Fortnightly  
research digest





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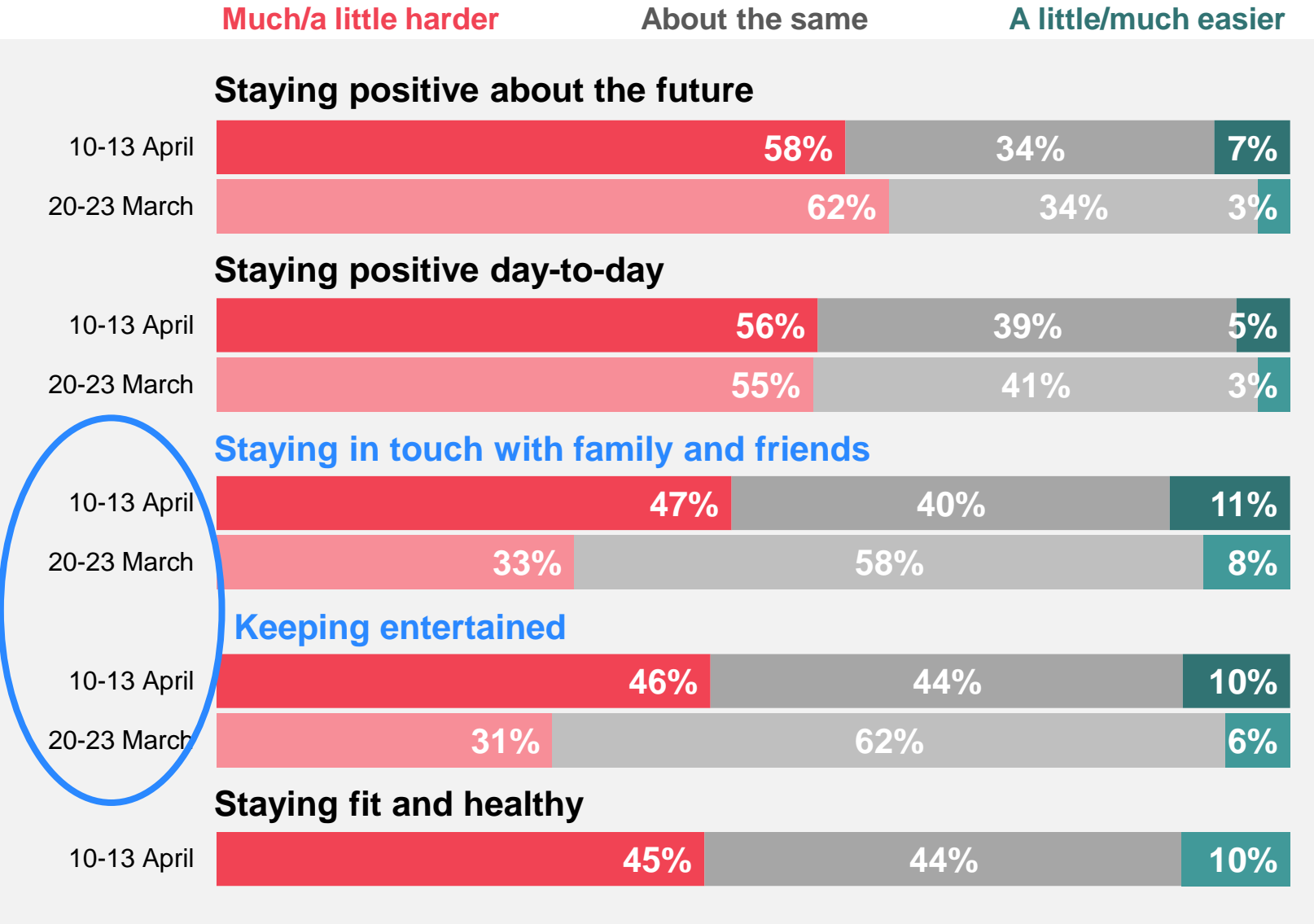
**The Singapore  
Experience**

# Mapping the phases **THE LOCKDOWN EXPERIENCE**



# THE PRESSURES OF LOCKDOWN

At the moment, are you finding each of the following easier, harder, or about the same compared with before the Coronavirus outbreak?



Base: 1,069 Online British adults 18+, 10-13 April 2020

Source: Ipsos MORI



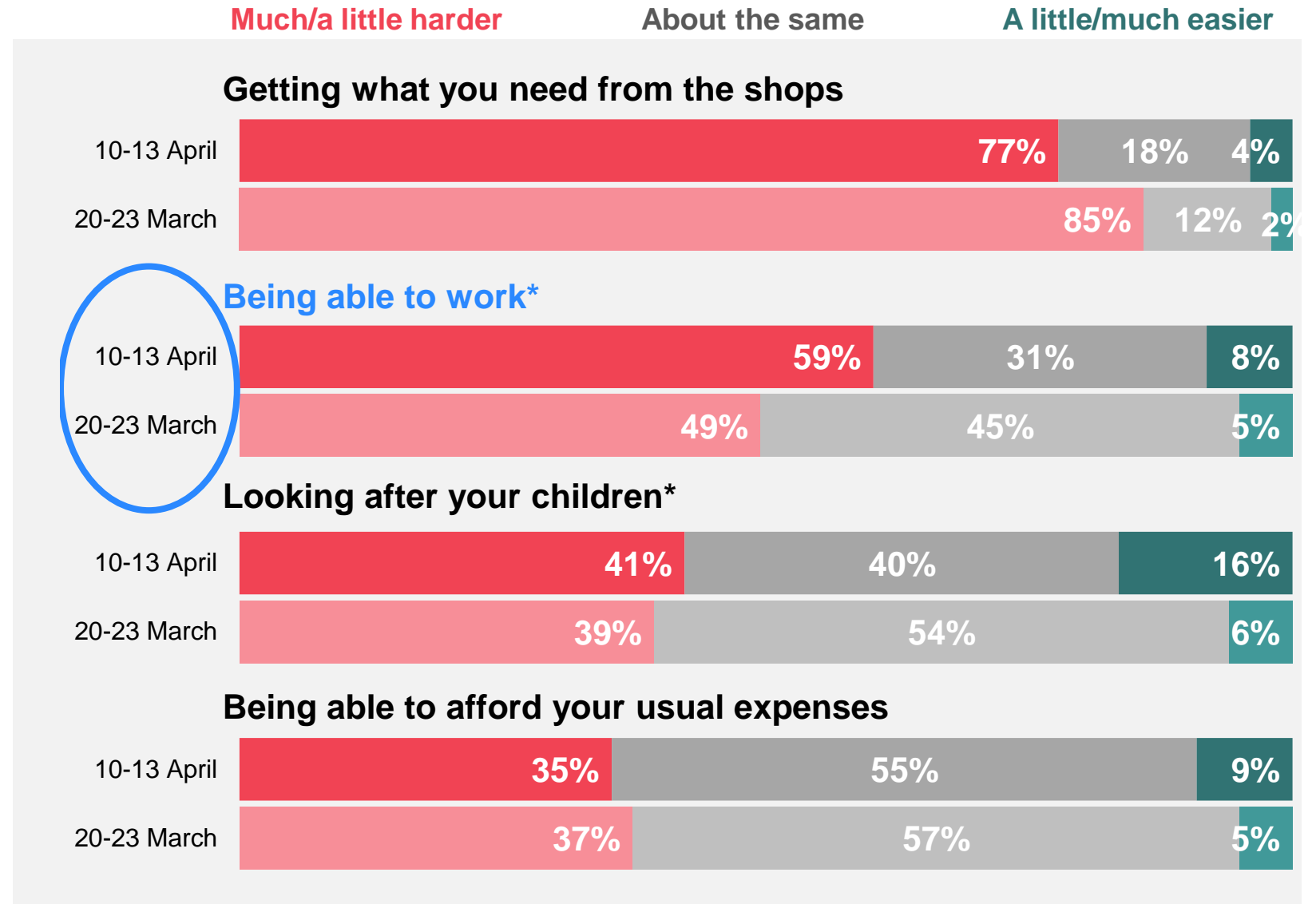


# THE PRESSURES OF LOCKDOWN

At the moment, are you finding each of the following easier, harder, or about the same compared with before the Coronavirus outbreak?



Video diaries [here](#)



**Base:** 1,069 Online British adults 18+, those with someone aged 17 or under in their household (289), those who are working (672), 10-13 April 2020

Source: Ipsos MORI

To explore the latest Ipsos research on the coronavirus outbreak in the UK follow [this link](#)

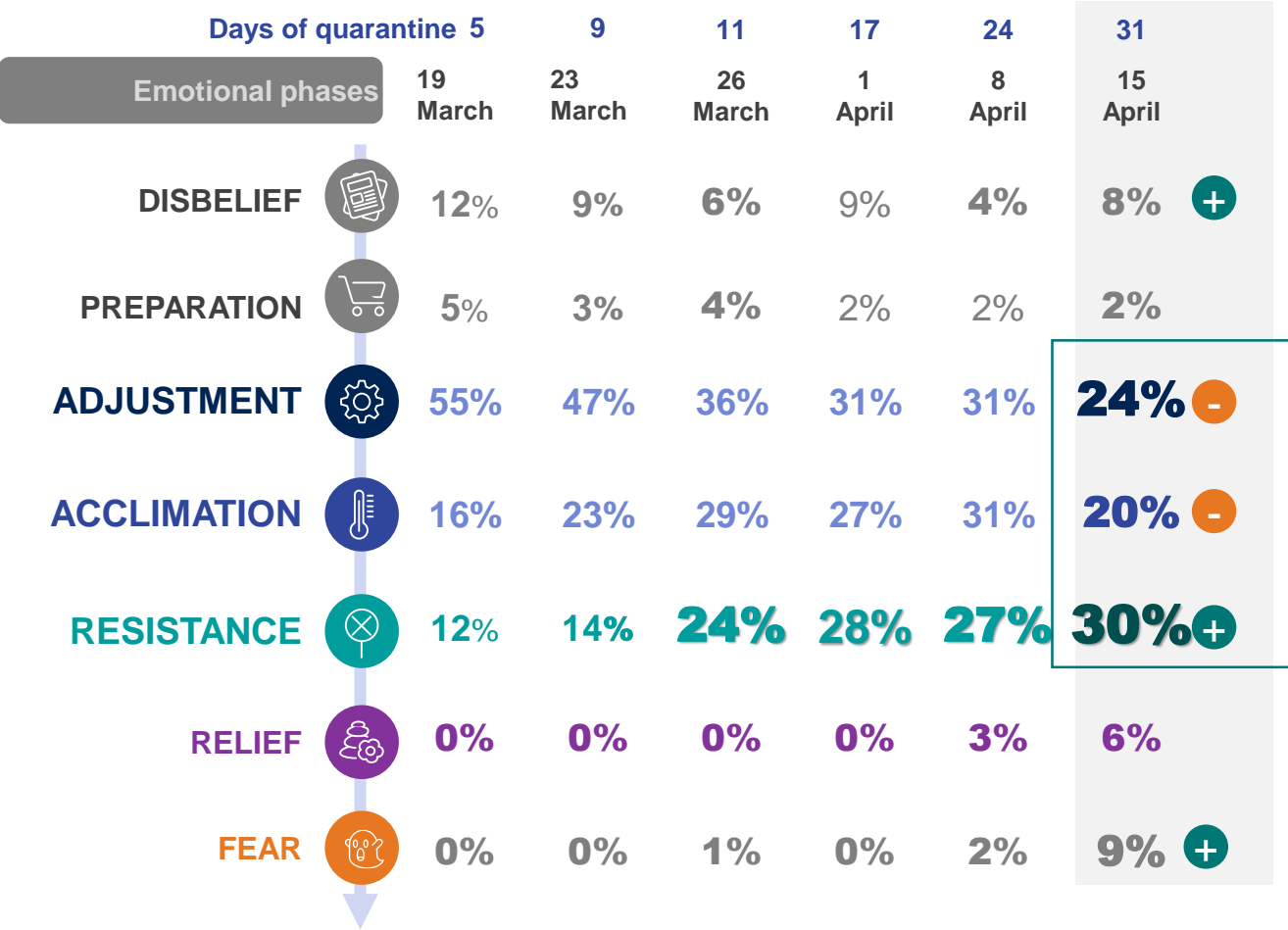




# DIFFERENT PEOPLE ARE AT DIFFERENT STAGES



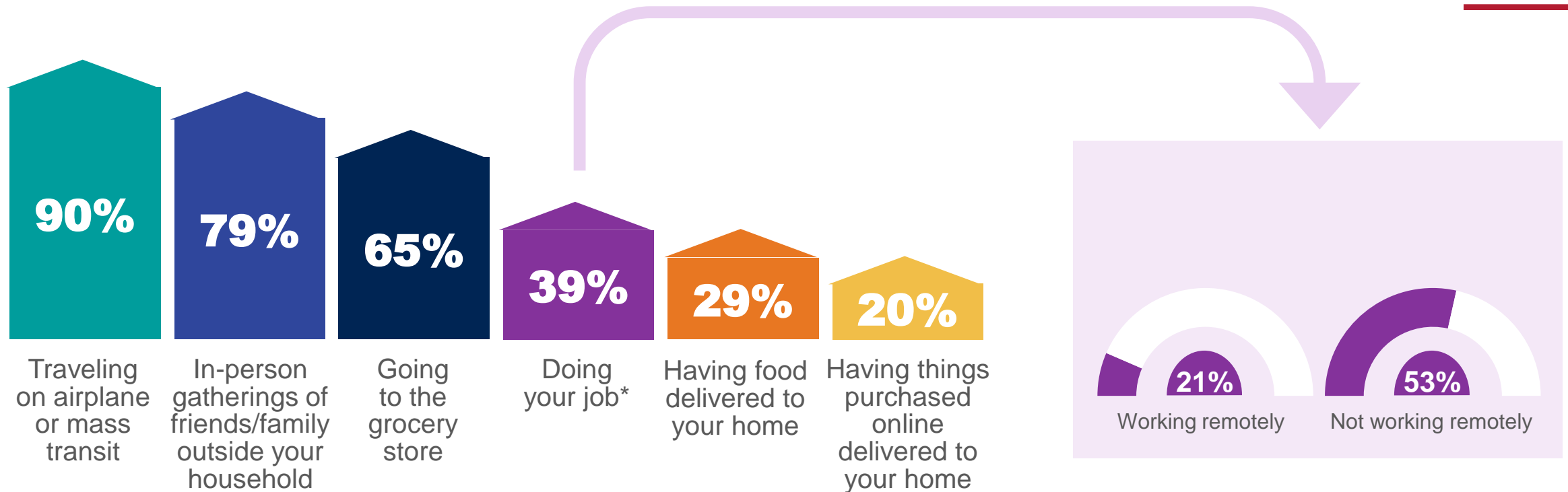
Which word best describes how you feel today?



# HOW WILL PEOPLE FEEL ABOUT ACTIVITIES OUTSIDE THE HOME?

How much of a risk to your health and well-being do you think the following activities are right now?

% Large risk + Moderate risk



Source: Ipsos/Axios Coronavirus Tracker.

Follow [this link](#) to explore our latest COVID-19 research in the US

© Ipsos



# Mapping the phases TRACKING BEHAVIOURS



Access latest China research [here](#)



Download media  
analysis [here](#) and [here](#)

# Mapping the phases A LINEAR PROCESS?

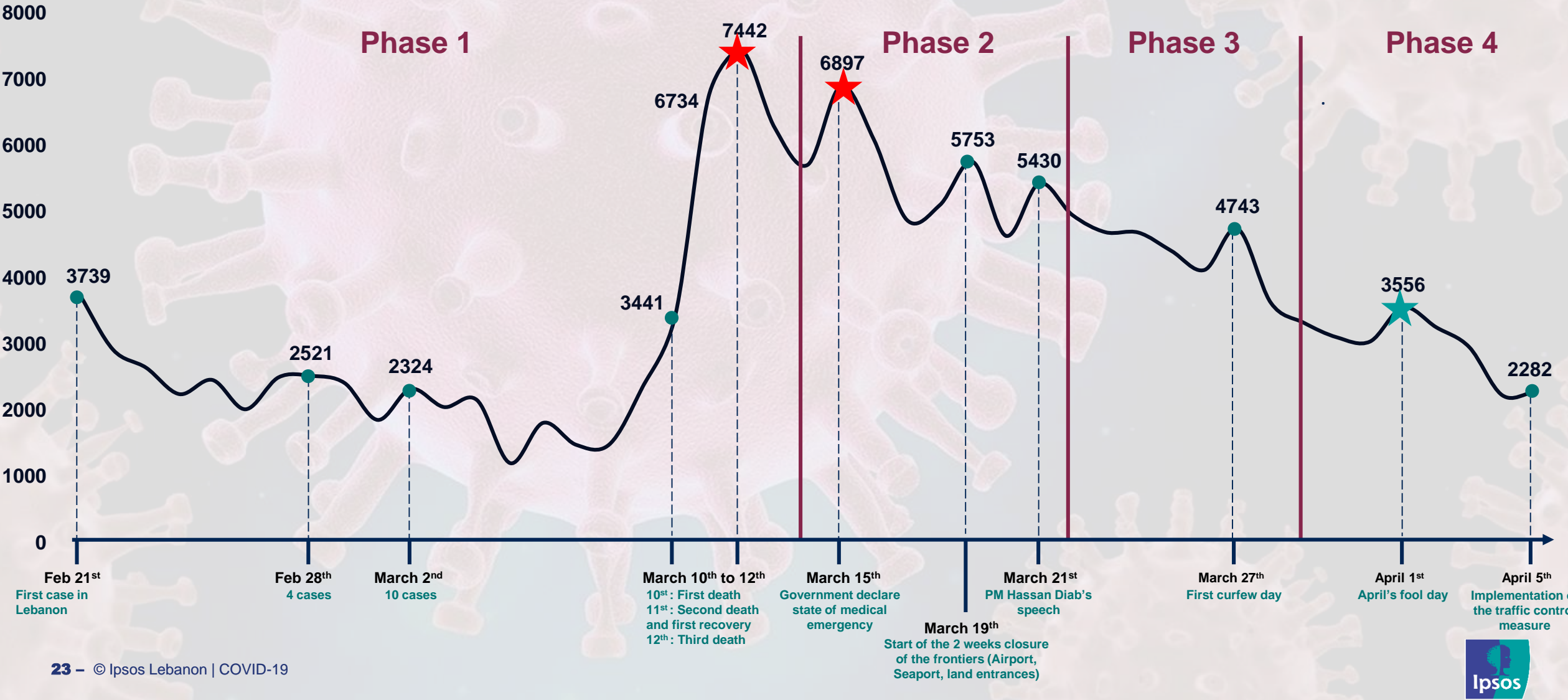




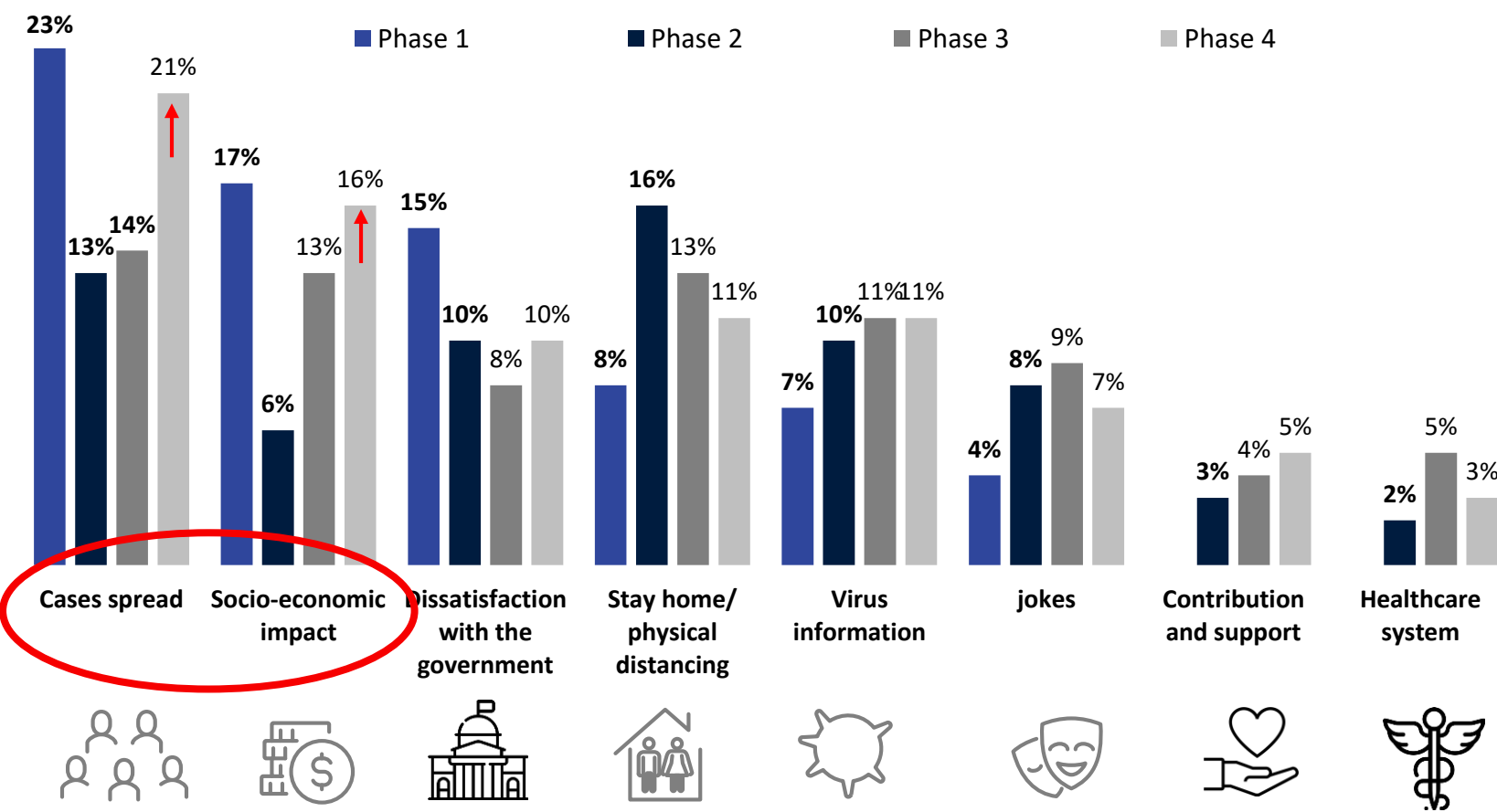
# COVID-19 VOLUME TREND

Since the 1<sup>st</sup> COVID-19 case was reported in Lebanon, conversations online peaked when the first 3 death cases were announced and when the government announced the state of medical emergency

Total analyzed mentions: 163,515  
Phase 1: February 21<sup>st</sup> to March 14<sup>th</sup>  
Phase 2: March 15<sup>th</sup> to March 22<sup>nd</sup>  
Phase 3: March 23<sup>rd</sup> to March 29<sup>th</sup>  
Phase 4: March 30<sup>th</sup> to April 5<sup>th</sup>



In **Phase 4** the focus was back on the **spread of the virus** and number of cases as well as on the **socio-economic impact** of the pandemic especially with the worsening of the economic crisis in Lebanon.



# EVOLUTION OF THE MAIN TOPICS DISCUSSED

With the current country lockdown and its implications, online discussions are changing focus.

## Increased focus on the spread of the virus.

With the growing impatience and economic repercussions, people are searching for answers on when this epidemic will end by discussing the latest figures and predictions as well as the latest cures/vaccines.

## Increased focus on the local economic crisis and the dissatisfaction with the local authorities

People are expressing their disapproval with some of the control measures implemented by the government. The Lebanese also expressed their dissatisfaction and disappointment in how the local authorities did not support the people especially those who can't provide for themselves and their families the basics such as food and shelter. Some also criticized how the local authorities are publicizing their actions that are to be considered their duties.

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# THE SINGAPORE EXPERIENCE

**Katharine Zhou**  
Country Manager  
Ipsos in Singapore



# BRAND GROWTH IN TIMES OF CRISIS

# 2

**Benoit Tranzer**

Global Service Line Leader, Brand Health Tracking

# BRAND GROWTH IN TIMES OF CRISIS

**Revisiting brand building during the  
COVID-19 pandemic**

Benoit Tranzer

23 April 2020



# Understanding **context** is critical





We are *adaptive* decision makers...

... and brands can *craft the context*

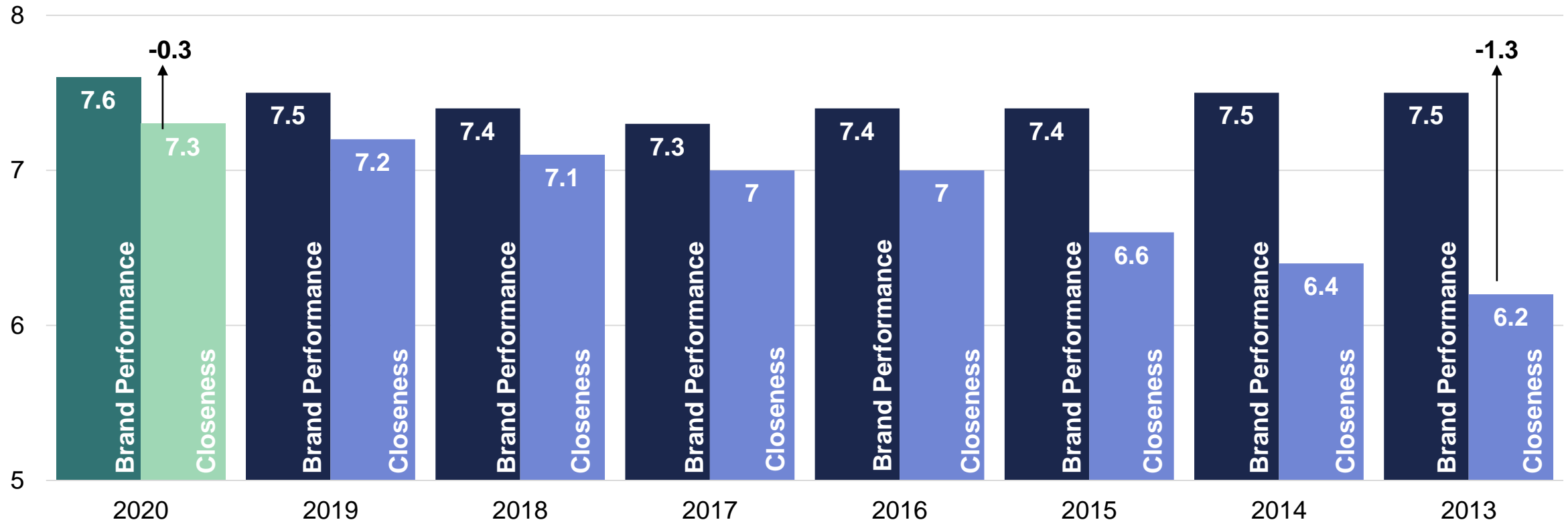


**Brands need to  
build emotional  
closeness with  
consumers**

**#1**



# Closeness is gradually playing a bigger role in building brand desire (Attitudinal Equity - AE)

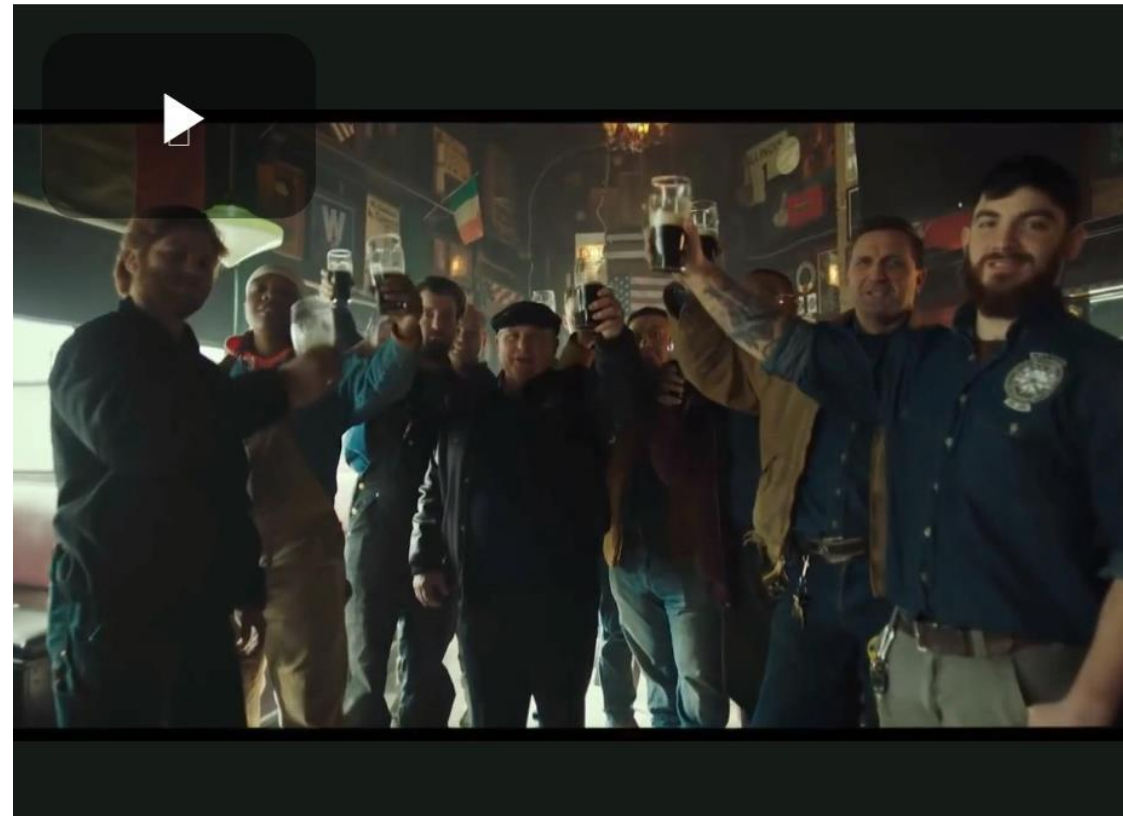


Source : Brand Value Creator (BVC) Database

# Building closeness by demonstrating empathy & adopting the right tone of voice

*'When you raise a pint of Guinness, also remember to raise each other up'*

**'DON'T WORRY, WE'LL MARCH AGAIN,' GUINNESS SAYS IN AD AFTER ST. PATRICK'S DAY PARADE SUSPENSIONS**

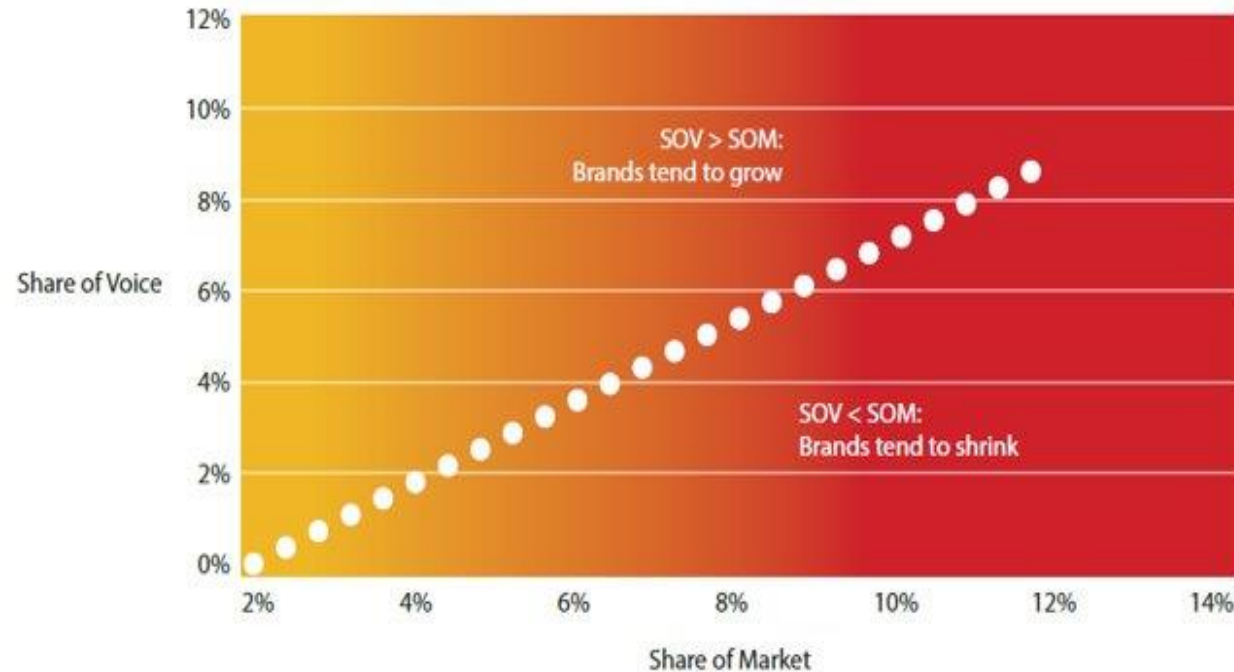


**Brands need to  
stay salient by  
creating new  
memory  
associations**

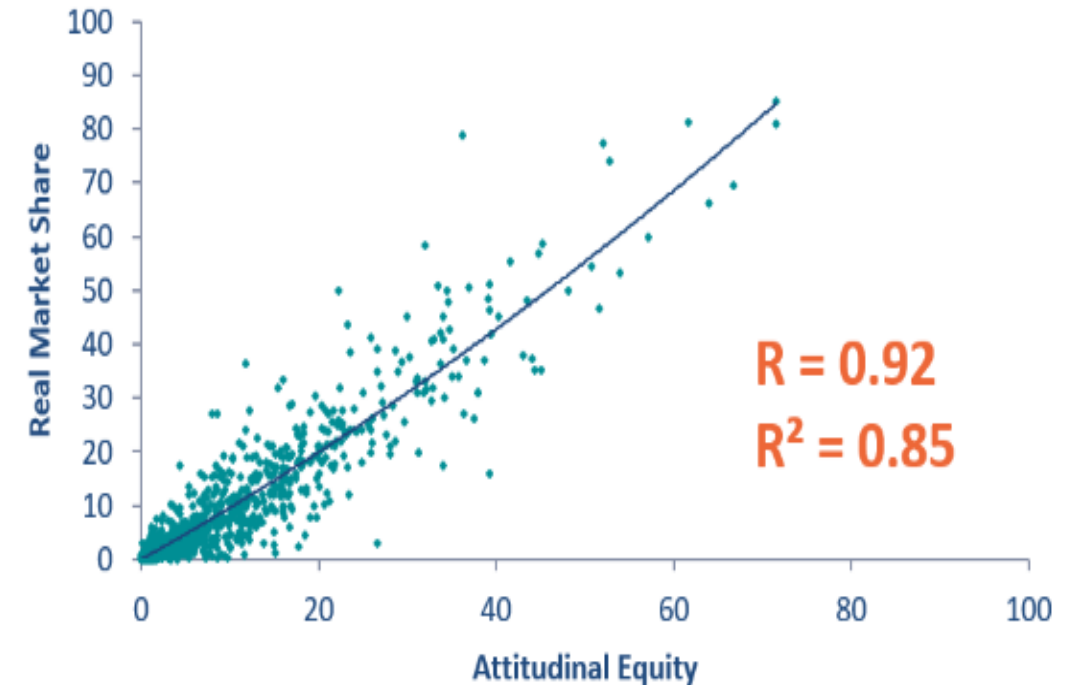
**#2**

# Breaking the marketing virtuous circle

(Share Of Voice / Equity / Share Of Market) ?



Source: Les Binet and Peter Field, *Media in Focus: Marketing Effectiveness in the Digital Era*, IPA, (Figure 07)



\*Source: Brand Value Creator (BVC) Database / Brand Desire (AE Attitudinal Equity)

Brands cannot 'go dark' in times of crisis  
**BUT** this doesn't mean that brands should simply carry on as before either

# Brands must review how they can generate salience



## FROM ATTENTION SALIENCE

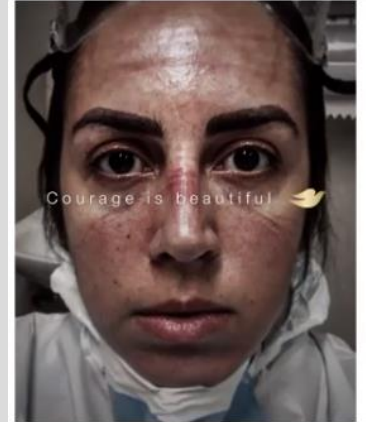
- ✓ Saturate mind in the moment of choice
- ✓ Ubiquity not to miss any moment
  - ✓ Maximizing repetition
- ✓ Leveraging assets & existing memories



## TO MEMORY SALIENCE

- ✓ Refresh & build positive mental associations
- ✓ Cues & nudge in the right moment
  - ✓ Reach over repetition
- ✓ Create a richer network of interconnected memories

Instagram



***“Courage is beautiful”***

***Dove***



**Brands need to  
revisit market  
effects to  
maximise choice**

**#3**

# Think carefully & creatively how conventional marketing levers will have to change

	2020	2019	2009
ACCESSIBILITY	31%	27%	27%
PRODUCT RANGE	26%	24%	16%
PRICE	12%	11%	18%

*Market Effects, 2020*

*Brands must prepare for the likely increase in people being price-conscious*

# Converted its mobile help platform to allow people to order groceries for elderly relatives



**Brands need to fit  
with the new  
paradigm  
global - local**

**#4**

# Welcome to the new paradigm LO-BAL

*“Only 39% of people agree global brands are now making better products than local ones”*

*Ipsos Global trends, 22,114 adults, 32 countries (2019)*

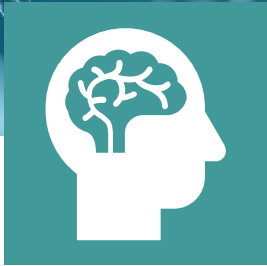




# Key considerations for branding in times of crisis



***Focus on building stronger emotional engagement***



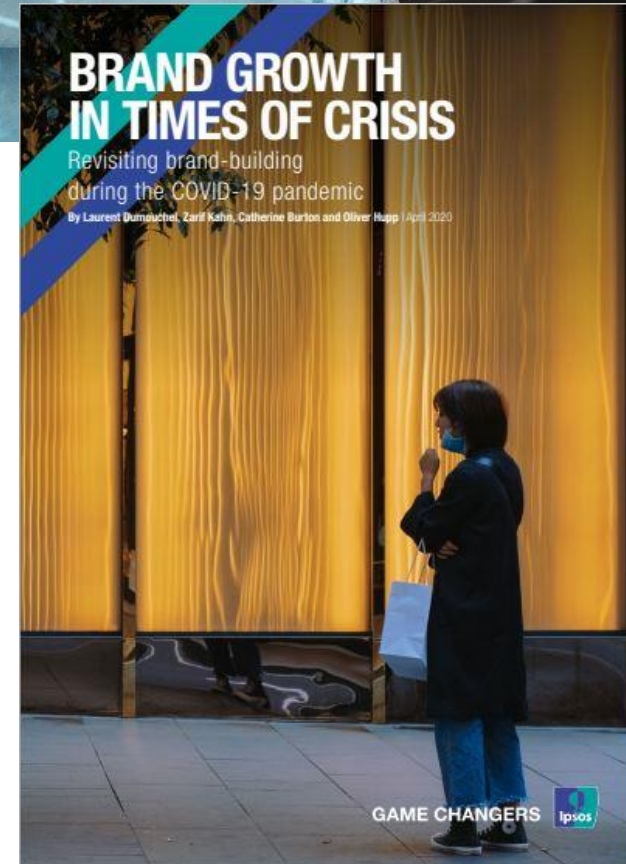
***Enrich a brand's mental associations to build memory salience***



***Monitor market effects and think creatively to maximise sales***



***Move from 'Glocal' to 'Lobal'***



# GET READY FOR THE NEW RETAIL NORMAL

# 3

**Alison Chaltas**

Global President, Shopper and Retail, Ipsos



# GET READY FOR THE NEW RETAIL NORMAL

Alison Chaltas





# COVID-19 HAS CHANGED EVERY ASPECT OF SHOPPING



## NEW PRIORITIES & NEW BEHAVIORS

---

- Changing values and rituals
- Supply and availability
- Operational challenges
- Altered context of price
- eCommerce tipping point!



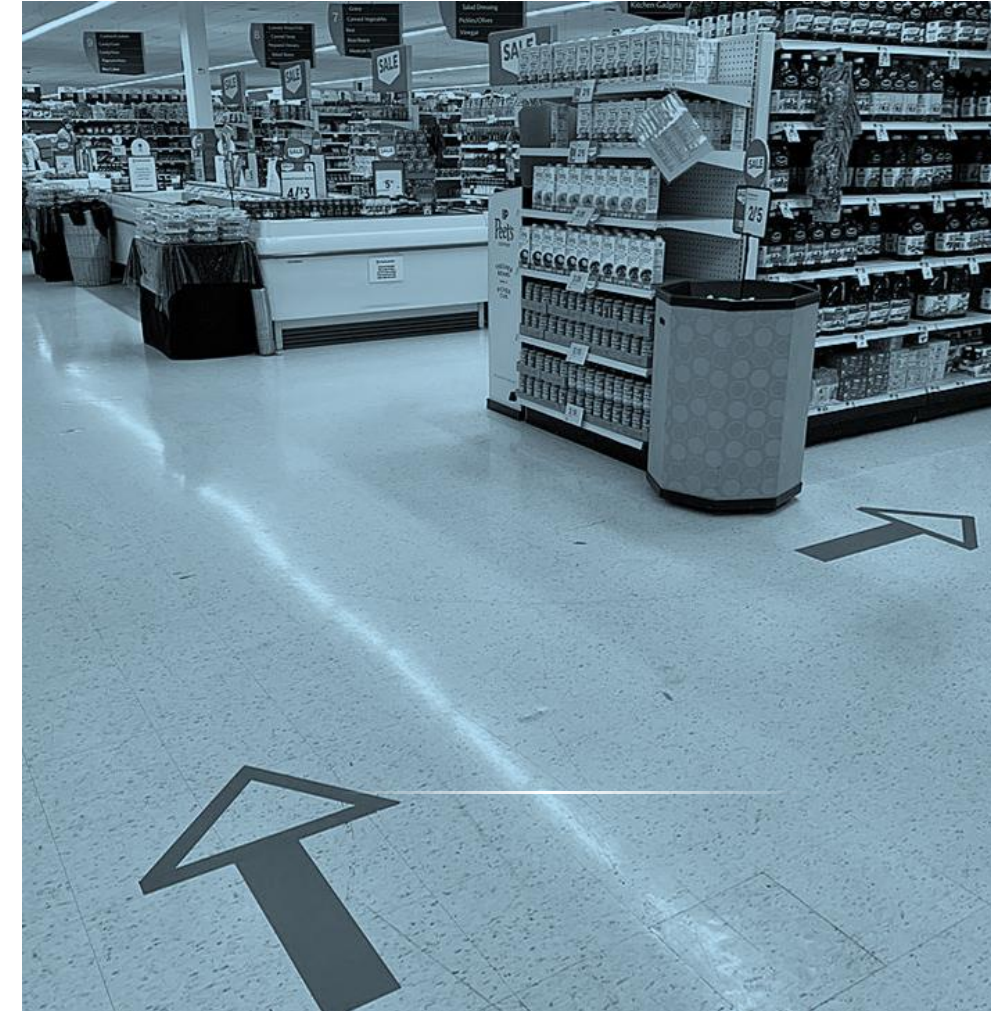
**WE CAN'T JUST SWEAT THIS ONE OUT**



**WE MUST GET AHEAD OF THE CURVE  
AND REINVENT FOR THE NEW REALITY**



# UNIMAGINABLE CHALLENGES DISRUPTING OMNICHANNEL SHOPPING



# FOSTERING EXPERIMENTATION



**40%** hope to continue new shopping routine



**10%** used restaurant delivery/pick up for 1<sup>st</sup> time

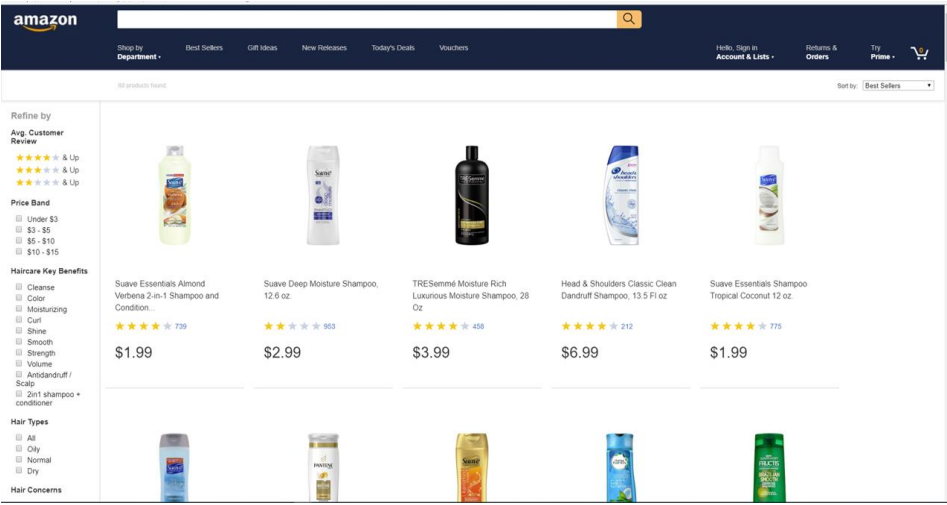
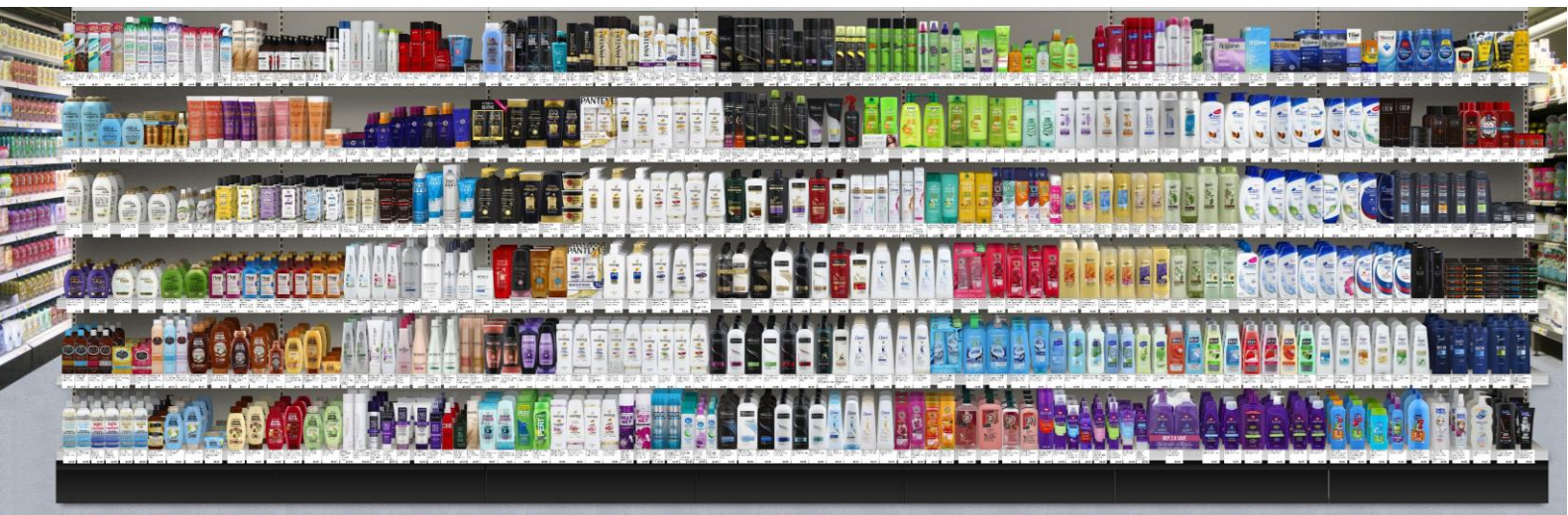
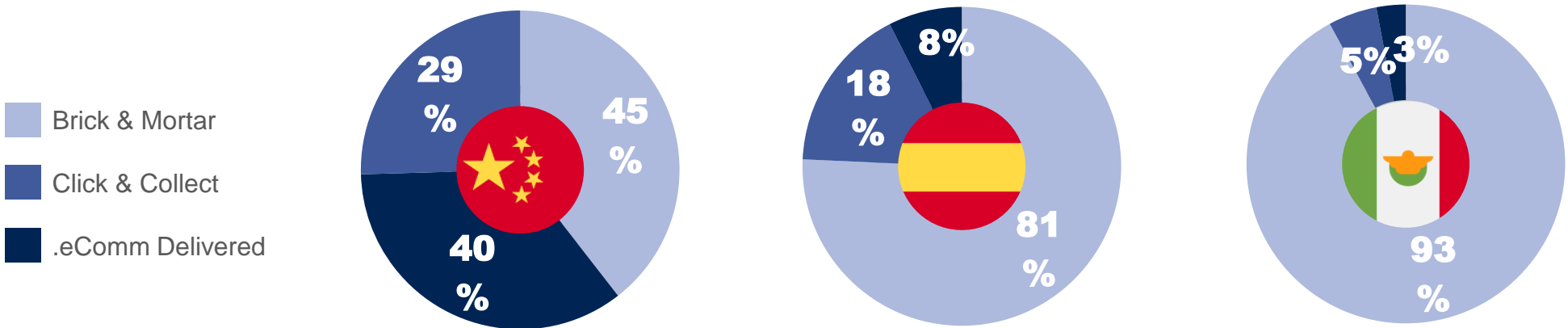
**9%** had groceries delivered for the 1<sup>st</sup> time





# MIGRATING TO LOWER TOUCH ENVIRONMENTS

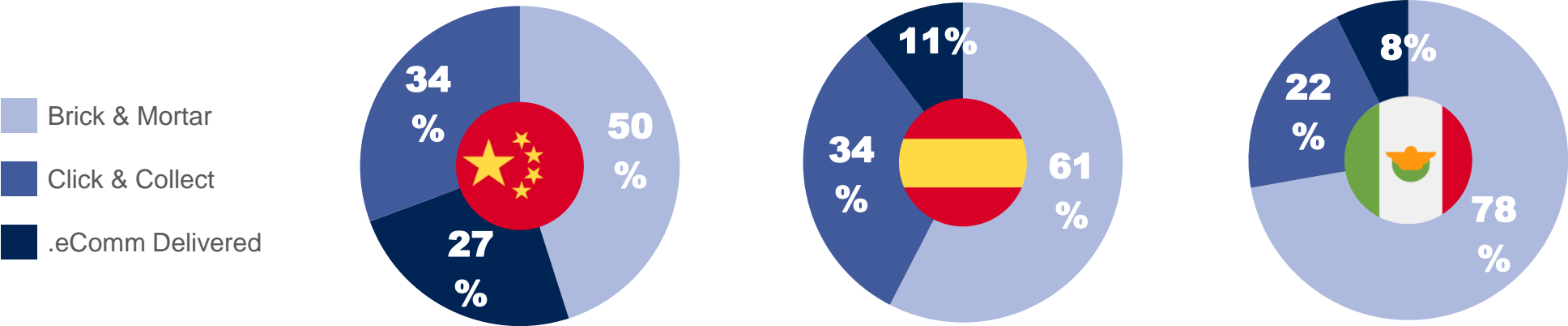
Channel Shopping for Beauty Q1 2020



Source: Ipsos Simstore and eCommerce Unleashed, March 2020

# CHANGING THE ROLE OF CUSTOMER ASSISTANCE

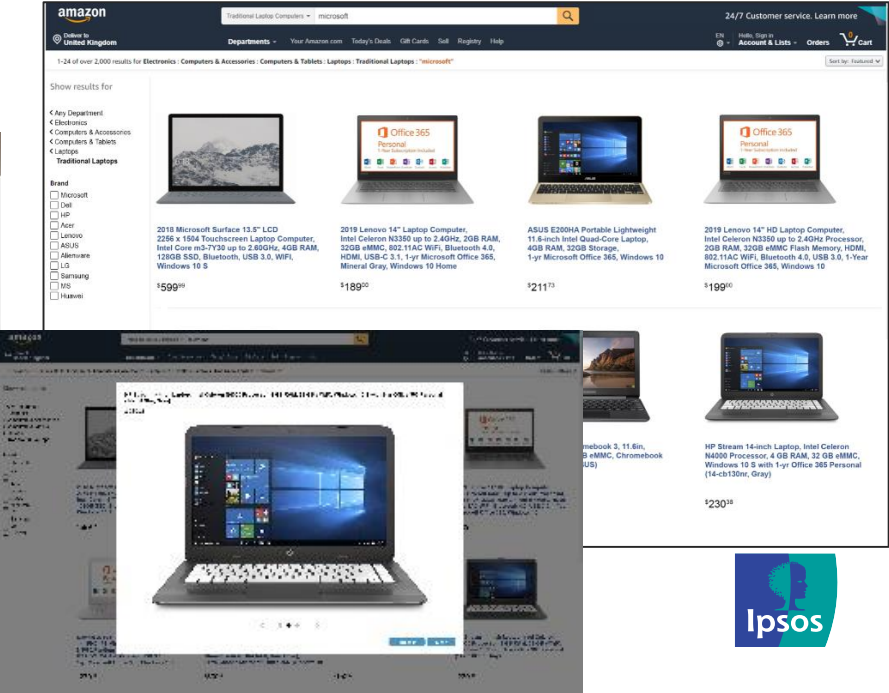
Channel Shopping for Consumer Electronics Q1 2020



Source: Ipsos Simstore and eCommerce Unleashed, March 2020

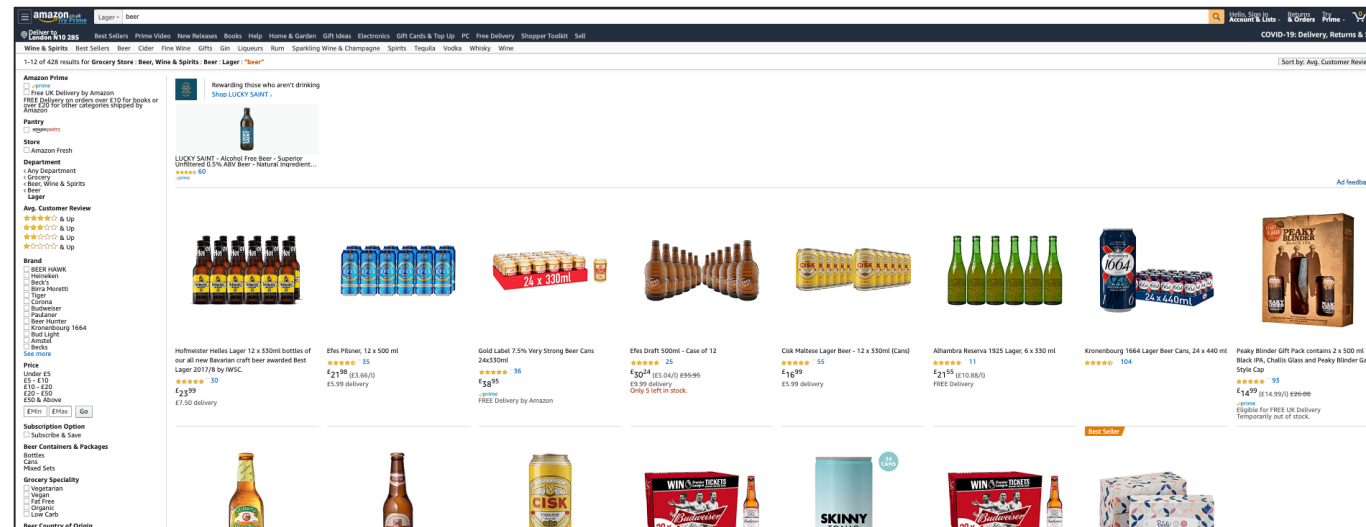


Source: Ipsos Simstore and eCommerce Unleashed, March 2020





# THE MOST UNPREDICTABLE MIGRATION





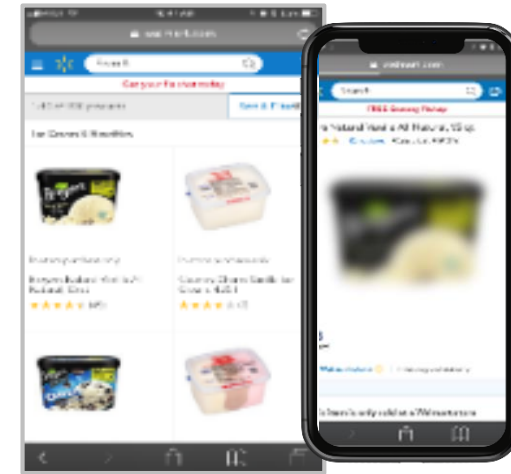
# WE MUST EMBRACE NEW SAFER, BEHAVIORAL RESEARCH METHODS



## Virtual Shopping

**92%**

Correlation between consumer behaviour on simulated shelves vs. physical shelves

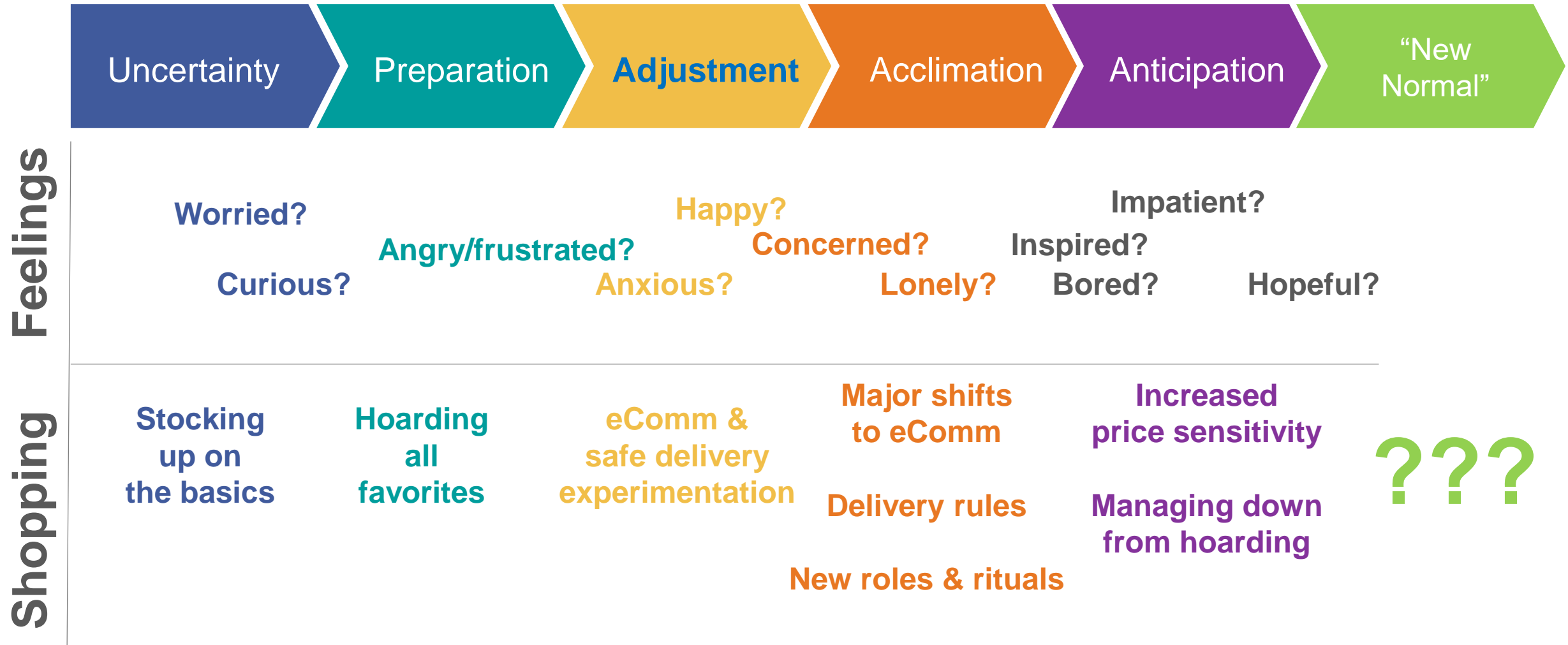


## Understanding eComm

**89%**

Correlation between consumer behaviour on a simulated eComm platform vs. real eComm behavior

# WHAT NEW ATTITUDES AND BEHAVIORS WILL STICK?



# ARE YOU READY?

**Everything about shopping has changed during the COVID-19 crisis.**

**But not all these changes will stick.**

**We need to get ahead of the curve and plan for the new retail normal.**



# THANK YOU

## Understanding the coronavirus crisis

### INTRODUCTION

**Jennifer Hubber**, Head of Ipsos Global Client Organization

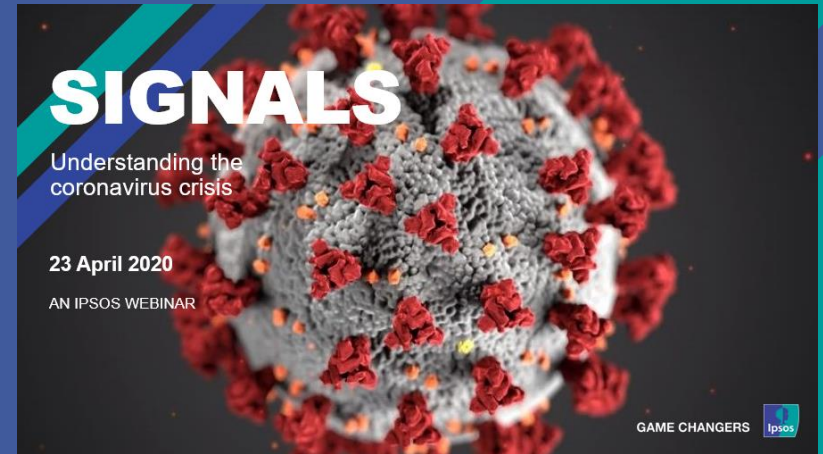
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**NEXT WEBINAR:**  
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