

SIGNALS

Understanding the
coronavirus crisis

20 May 2020

AN IPSOS WEBINAR

GAME CHANGERS



AGENDA

Understanding the coronavirus crisis

INTRODUCTION

Jennifer Hubber, Head of Ipsos Global Client Organization

ATTITUDES & BEHAVIOURS: What Next?

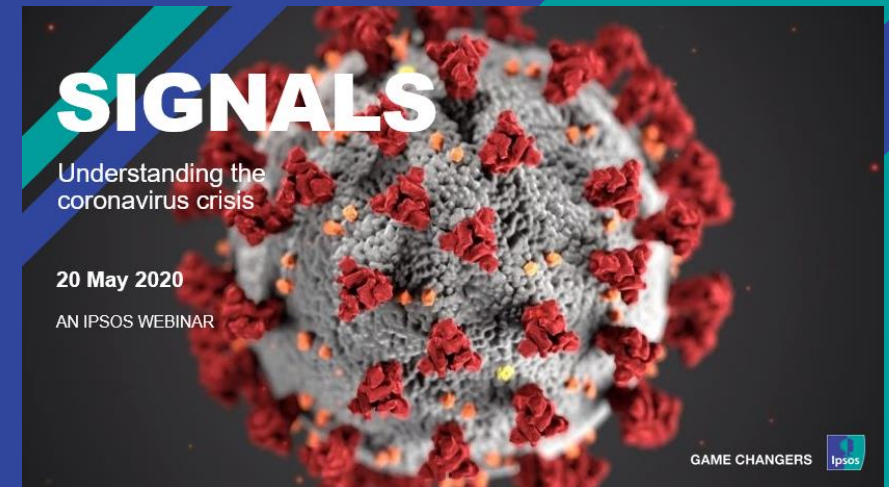
Simon Atkinson, Chief Knowledge Officer and
Sidar Gedik, CEO of Ipsos in Turkey

COVID CONVERSATIONS

Leendert de Voogd, Global Service Line Leader, Social Intelligence Analytics

CHINA ENTERS A NEW PHASE

Yan Ho, Service Line Leader,
Channel Performance, Ipsos in China



**ACCESS THE RECORDING
OF THIS WEBINAR [HERE](#)**

**PREVIOUS SIGNALS
WEBINARS AVAILABLE BELOW**

[26 March](#)

[8 April](#)

[23 April](#)

[7 May](#)

ATTITUDES AND BEHAVIOURS What Next?

1

Simon Atkinson
Chief Knowledge Officer

UNDERSTANDING THE CORONAVIRUS CRISIS

1

THE CURRENT MOOD

Tracking public opinion

2

THE NEXT PHASE

From attitudes to behaviours

3

TAKING STOCK

Reflections from Turkey

UNDERSTANDING THE CORONAVIRUS CRISIS

1

THE CURRENT MOOD

Tracking public opinion

2

THE NEXT PHASE

From attitudes to behaviours

3

TAKING STOCK

Reflections from Turkey

THE CURRENT MOOD



#1: COVID STILL THE BIG WORRY, BUT...



MAY RESULTS

54% put **Coronavirus** among top 3 issues facing their country

It's #1 in 17/27 countries

Down from 61% in April

Unemployment takes over #1 spot in Argentina, Italy, S.Africa, S.Korea, Spain, Turkey

#2: CONSUMER CONFIDENCE: GRIM READING

May 2020 National Index and Change since January



IPSOS GLOBAL INDEX

Lowest point since series started in **March 2010**

All countries in worse place than at start of year

Lowest scores:

Turkey, Russia, Japan, Italy and South Africa

Some improvement on last month: China and South Korea

Explore the results here

UNDERSTANDING THE CORONAVIRUS CRISIS

1

THE CURRENT MOOD

Tracking public opinion

2

THE NEXT PHASE

From attitudes to behaviours

3

TAKING STOCK

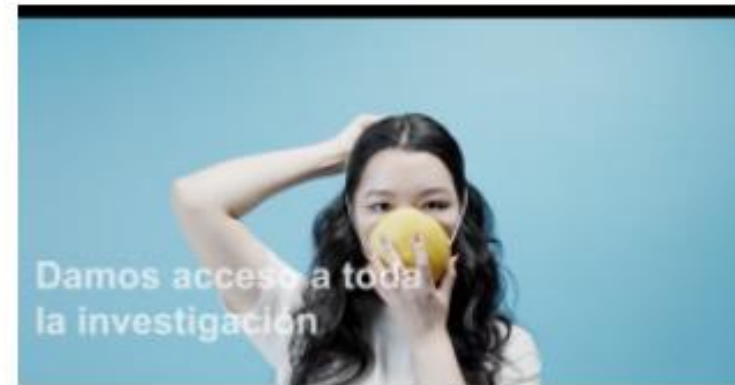
Reflections from Turkey

THE NEXT PHASE: Hopes and Fears



SOCIEDAD - 15 Mayo 2020

Covid- 19: Nuestras
investigaciones son tuyas



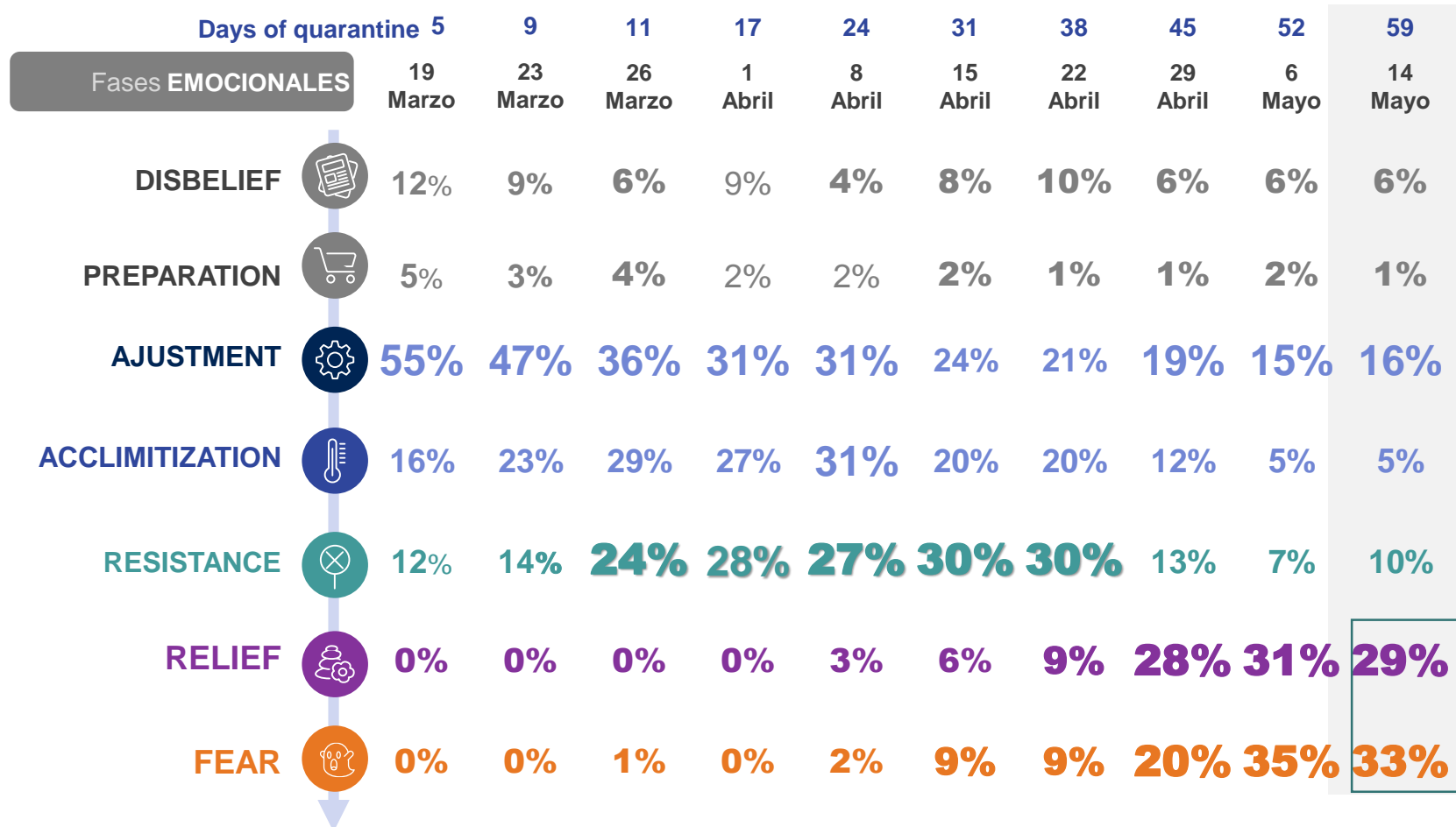
Spain research digest [here](#)



SPAIN 59 DAYS IN: RELIEF AND FEAR



Which word best describes **how you feel today?**



LOOKING FORWARD: FEAR OF NEW CONFINEMENT AND AN ECONOMIC CRISIS



The 5 main worries

New confinement

84%

Lasting economic crisis

78%

Politicians aren't competent

56%

Personal finances
Loss of job, business, income

46%

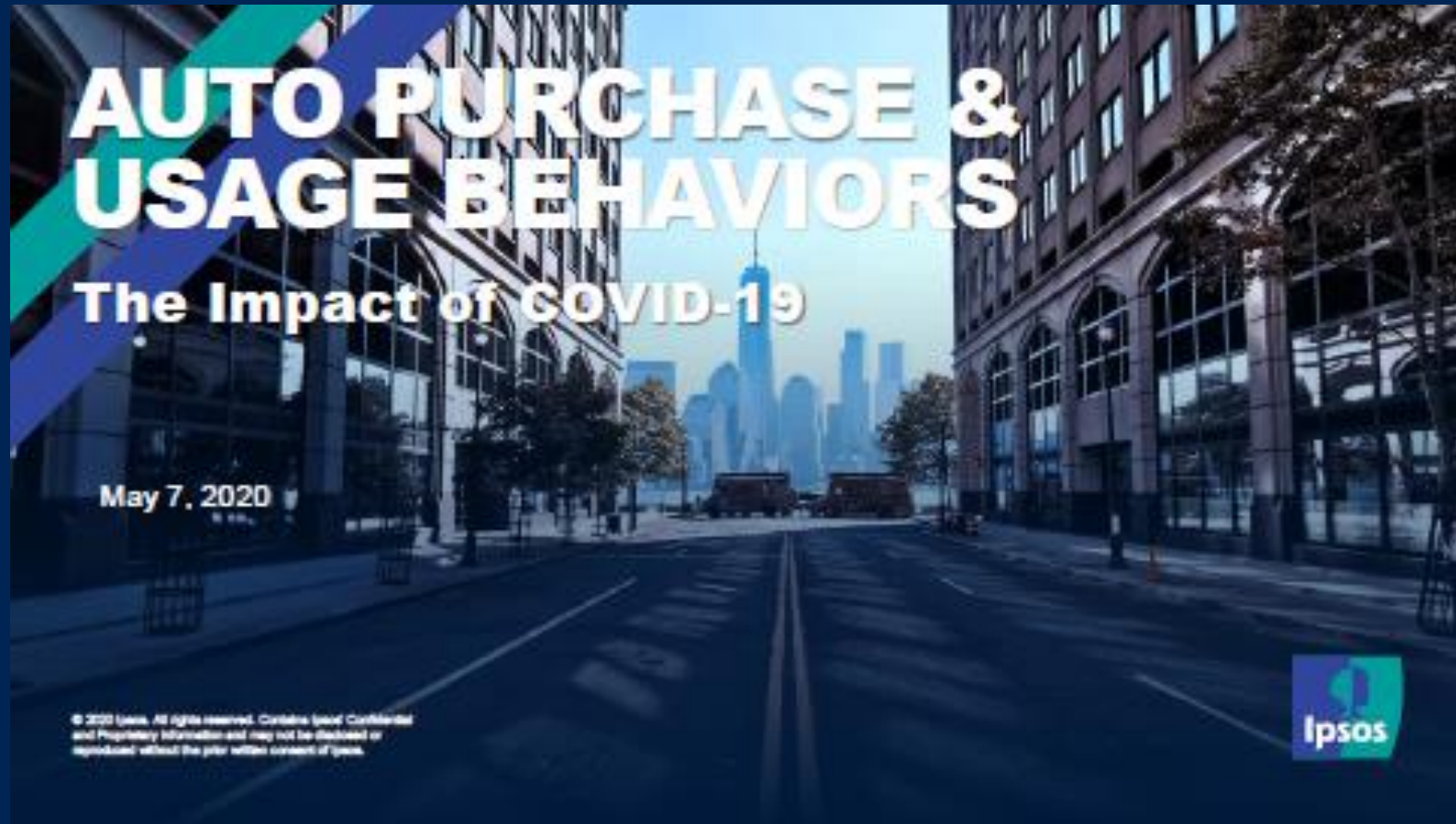
Loss of civil liberties

23%



THE NEXT PHASE:

From attitudes to behaviours



US research digest [here](#)



EXPLORING INTENDED BEHAVIOURS

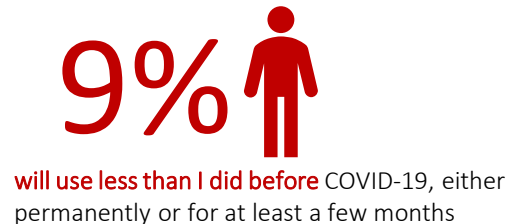
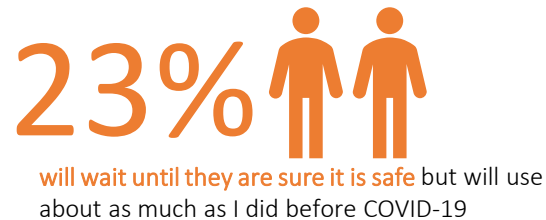
Thinking about when covid-19-related closures and restrictions end, how will you proceed in using...?



Drive my own vehicle



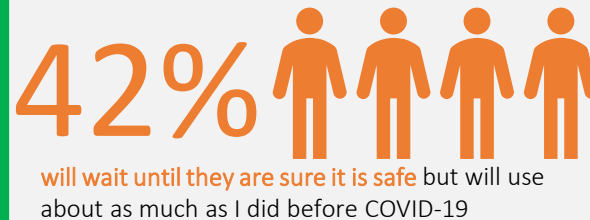
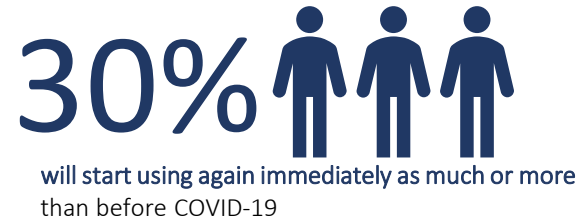
Among those who *previously drove their own vehicle*



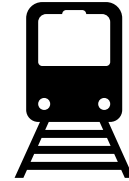
Use ride sharing services



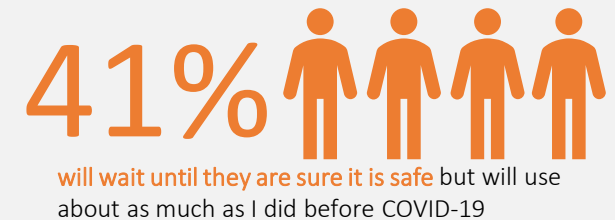
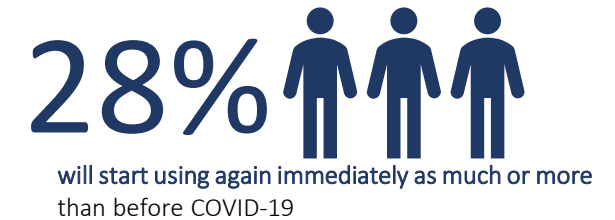
Among those who *previously used ride sharing services*



Use public transportation



Among those who *previously used public transportation*



THE NEXT PHASE:

Being in touch with the pace of change



US research digest [here](#)



TWO WEEKS AGO

Fieldwork **1-4 May**

Self-
quarantined
41%

(Staying at home and avoiding contact with others for 14 days).

Down from 53% on 10-13 April

but

90%

Are social distancing

(Staying at home and avoiding contact with others as much as possible)

TWO WEEKS LATER

Fieldwork **15-18 May**

Self-
quarantined
35%

(Staying at home and avoiding contact with others for 14 days).

Down from 53% on 10-13 April

but

87%

Are social distancing

(Staying at home and avoiding contact with others as much as possible)



TWO WEEKS AGO

Fieldwork **1-4 May**

Gone out
to eat
9%

(Starting point: 56%, on 13-16 March)

but

69%

Have had take-out meal
from restaurant

TWO WEEKS LATER

Fieldwork **15-18 May**

Gone out
to eat
12%

(Starting point: 56%, on 13-16 March)

but

70%

Have had take-out meal
from restaurant



TWO WEEKS AGO

Fieldwork **1-4 May**

Risky to meet
friends/family

69%

it was

79%

Two weeks ago

17-20 April

TWO WEEKS LATER

Fieldwork **15-18 May**

Risky to meet
friends/family

64%

it was

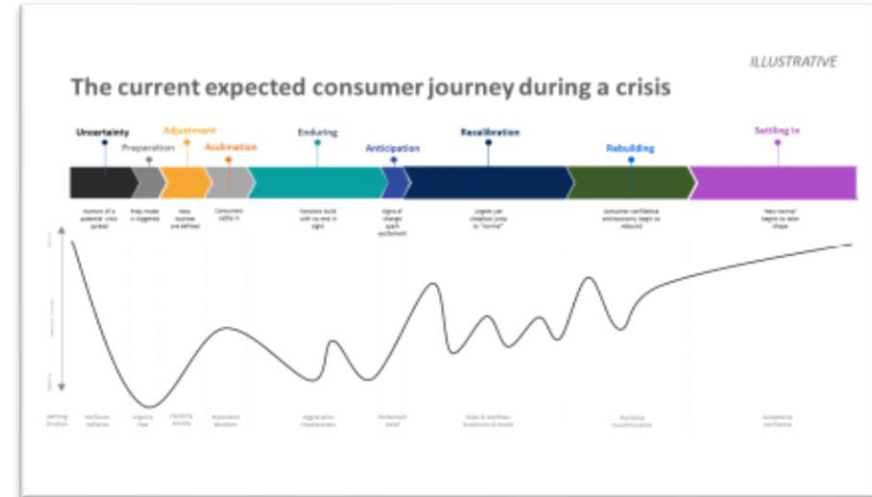
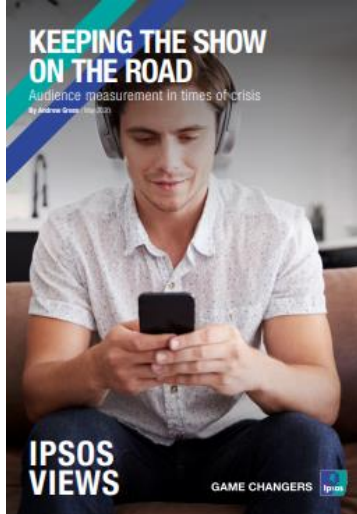
79%

Four weeks ago

17-20 April



UNDERSTANDING THE NEXT PHASE: IPSOS COVID-19 HOME PAGE



#1 Expert analysis

#2 Latest opinion research



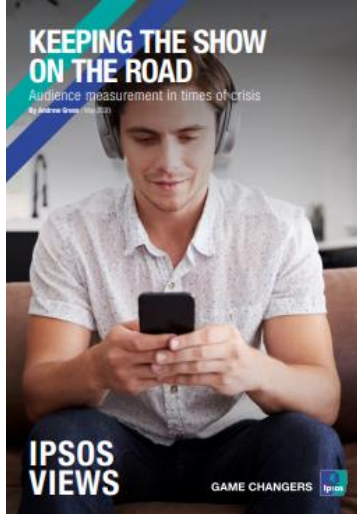
© #3 First-hand accounts

Pw: ECECovidWatch2020

#4 Fortnightly research digest



UNDERSTANDING THE NEXT PHASE: IPSOS COVID-19 HOME PAGE



#1 Expert analysis



© #3 First-hand accounts

Pw: ECECovidWatch2020

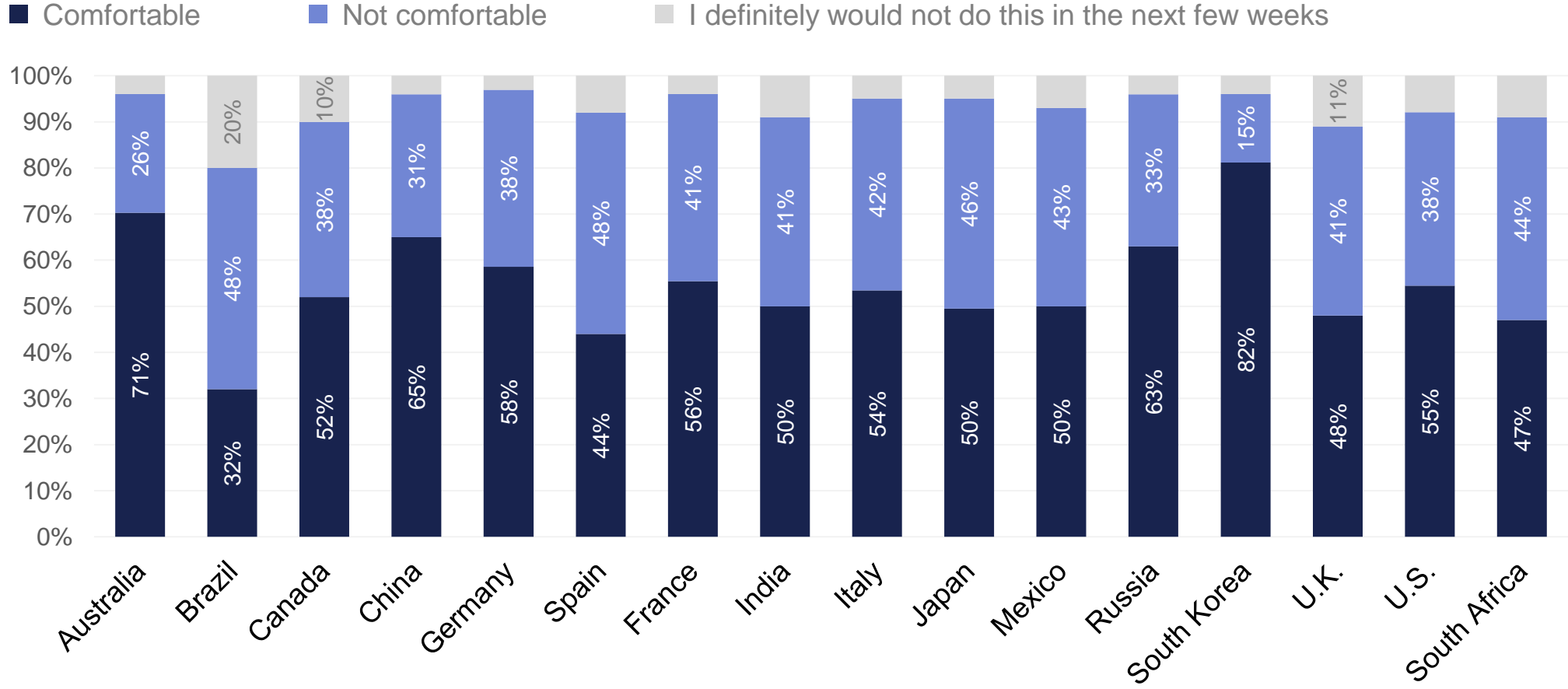


#2 Latest opinion research

#4 Fortnightly research digest



ARE YOU COMFORTABLE GOING BACK TO THE WORKPLACE?



Q: How comfortable would you feel doing each of the following in the coming weeks?

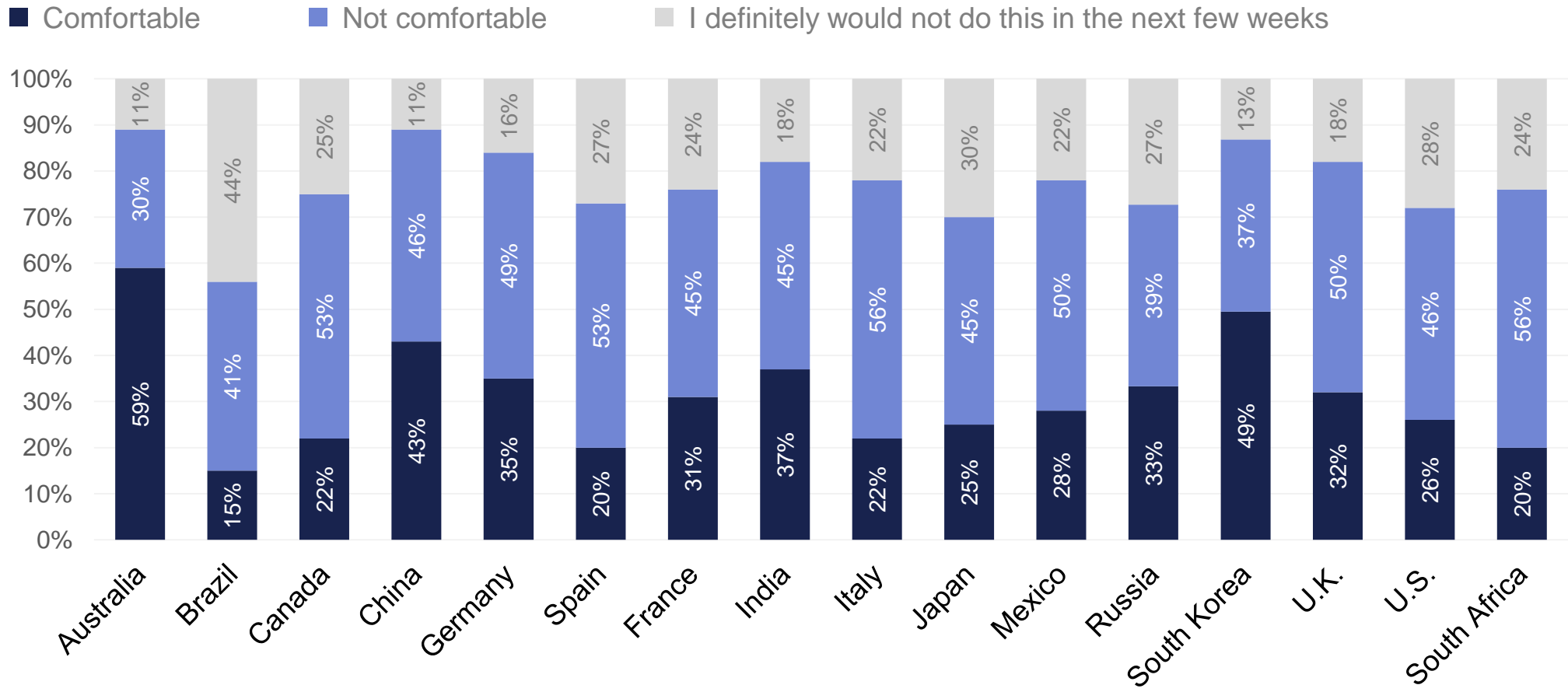
Going to your place of work.

Note: Data labels under 10% are not shown

10,495 adults polled in 16 countries from May 7-10, 2020



ARE YOU COMFORTABLE ALLOWING CHILDREN TO GO BACK TO SCHOOL?



Q: How comfortable would you feel doing each of the following in the coming weeks?

Allowing children to return to school.

Note: Data labels under 10% are not shown

15,957 adults polled in 16 countries from May 7-10, 2020



UNDERSTANDING THE CORONAVIRUS CRISIS

1

THE CURRENT MOOD

Tracking public opinion

2

THE NEXT PHASE

From attitudes to behaviours

3

TAKING STOCK

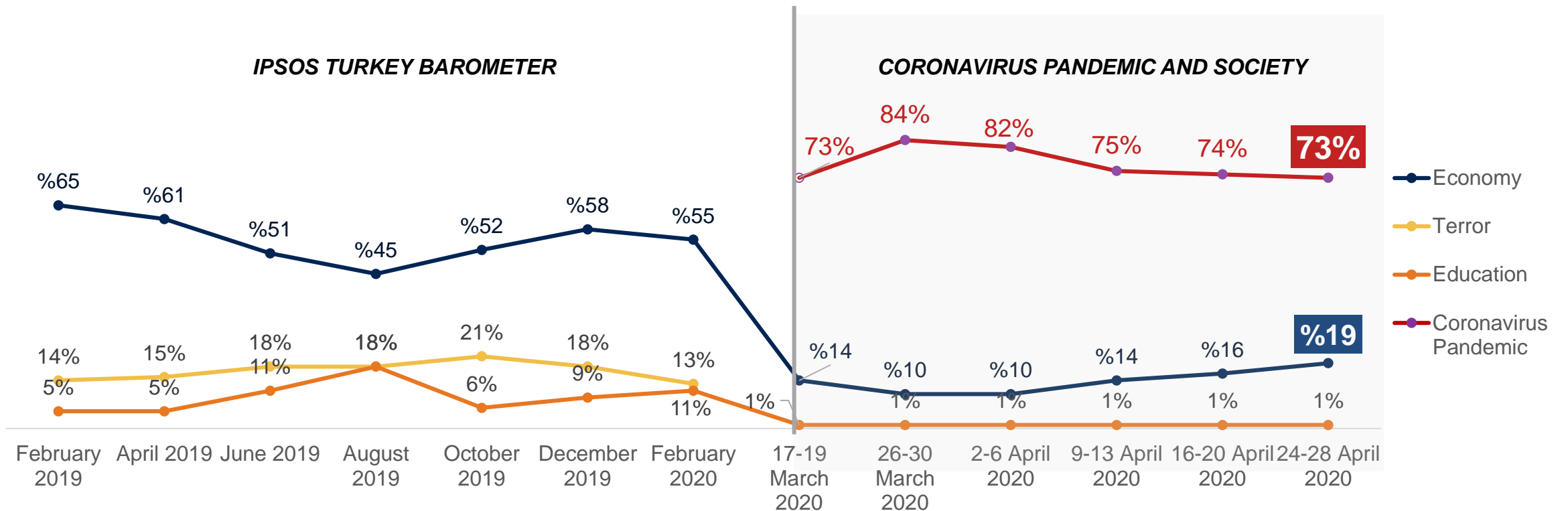
Reflections from Turkey

FOCUS ON TURKEY



Coronavirus pandemic has surpassed economic problems to become **the most important problem** in Turkey.

«WHAT IS THE MOST IMPORTANT PROBLEM IN TURKEY NOW?»



THE TURKEY EXPERIENCE

Sidar Gedik
CEO, Ipsos in Turkey



Follow [this link](#) to access the **Turkey**
in the time of **COVID-19** report

COVID CONVERSATIONS

2

Leendert de Voogd
Global Service Line Leader,
Social Intelligence Analytics



Download the analysis of **Food Conversations** [here](#)

Browse the **latest social media analysis** [here](#)

COVID-19: WHAT SOCIAL INTELLIGENCE CAN TEACH US

Leendert de Voogd – Global Leader Social Intelligence Analytics
20 May 2020

GAME CHANGERS



LESSON #1: SOCIAL MEDIA, A “REMEDY” TO LOCKDOWN

NUMBER OF NEW USERS Q1 2020 VS Q4 2019



+47M users
(+14%)



+105M users
(+4.2%)



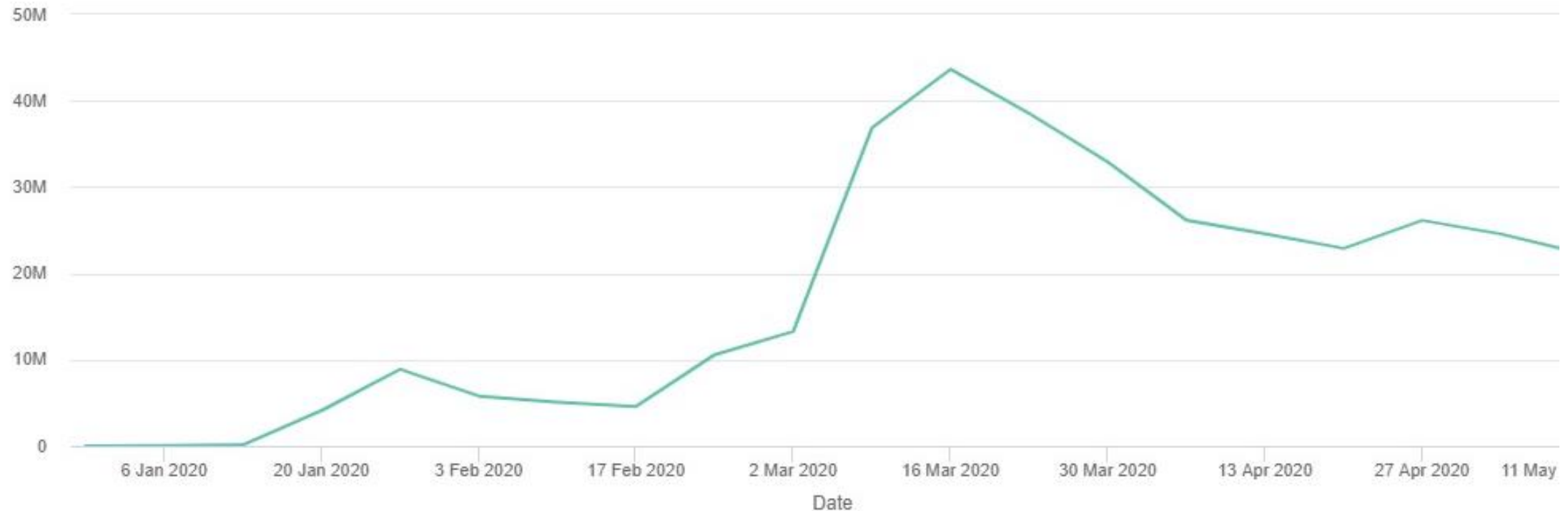
+42M users
(+4.5%)

LESSON #1: SOCIAL MEDIA, A “REMEDY” TO LOCKDOWN

MORE THAN 1 BILLION SOCIAL MEDIA COVID-19 POSTS ANALYSED

Evolution of the number of original posts (Retweets excluded)

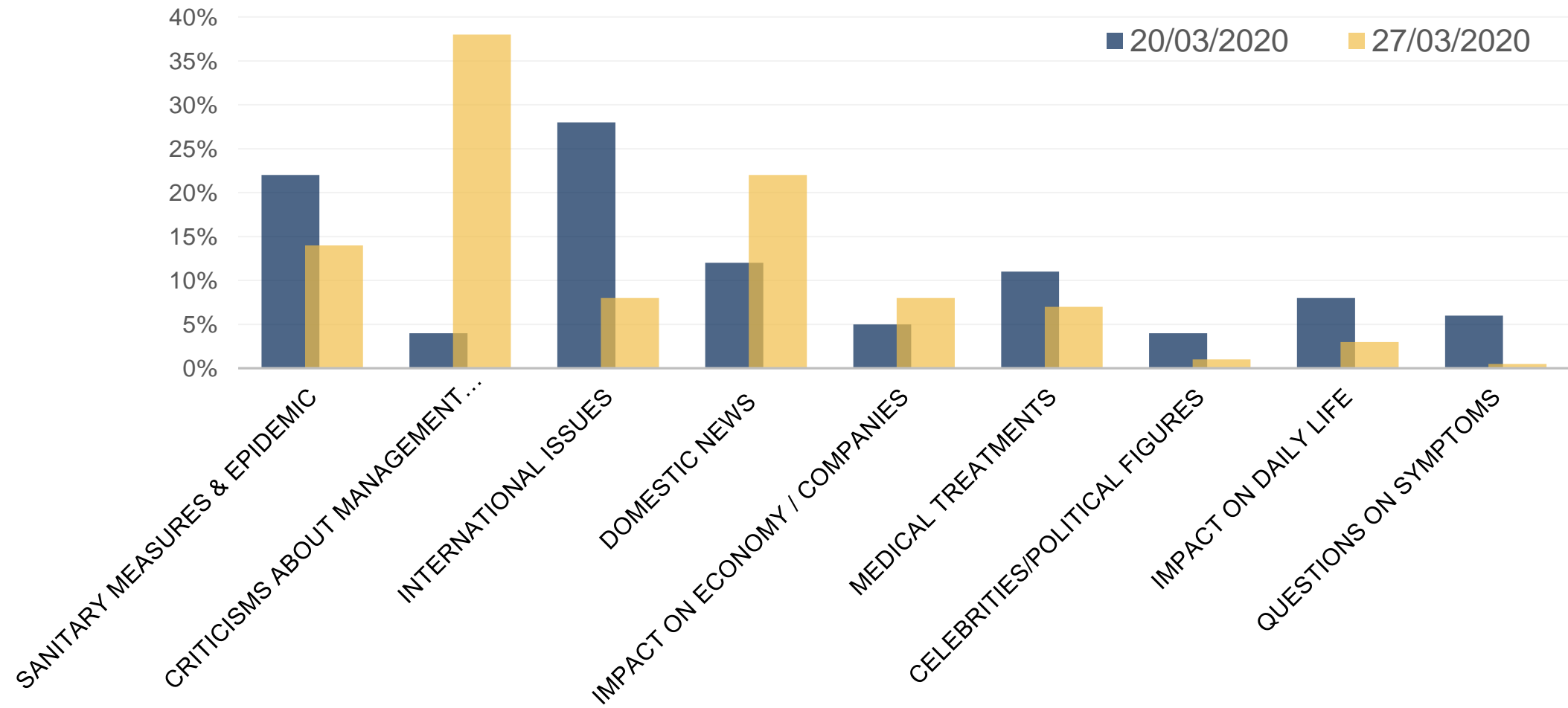
2020/01/01 - 2020/05/17



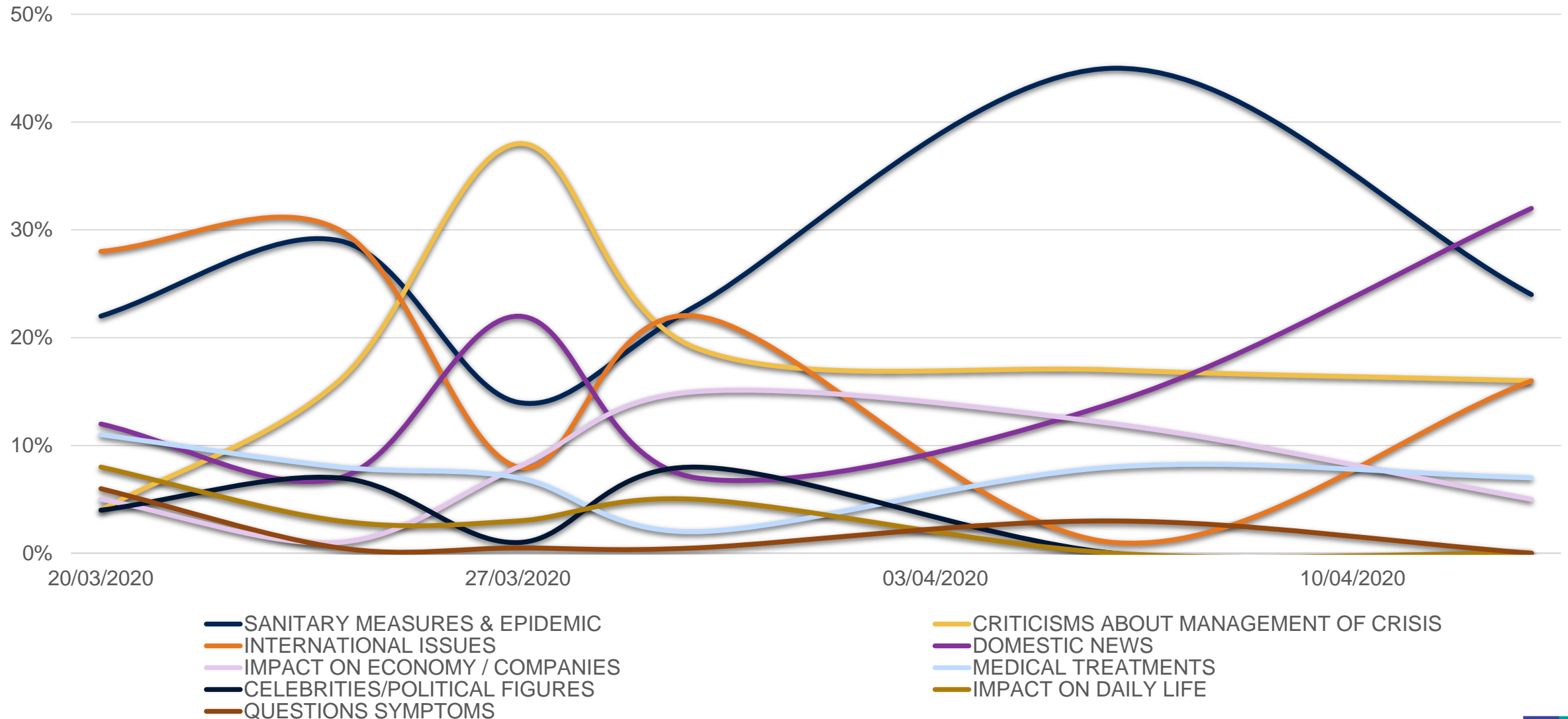
Source: Synthesio, an Ipsos Company

LESSON #2: THEMES ARE SHIFTING ON A DAILY BASIS!

Main Topics - French conversations



LESSON #2: THEMES ARE SHIFTING ON A DAILY BASIS!



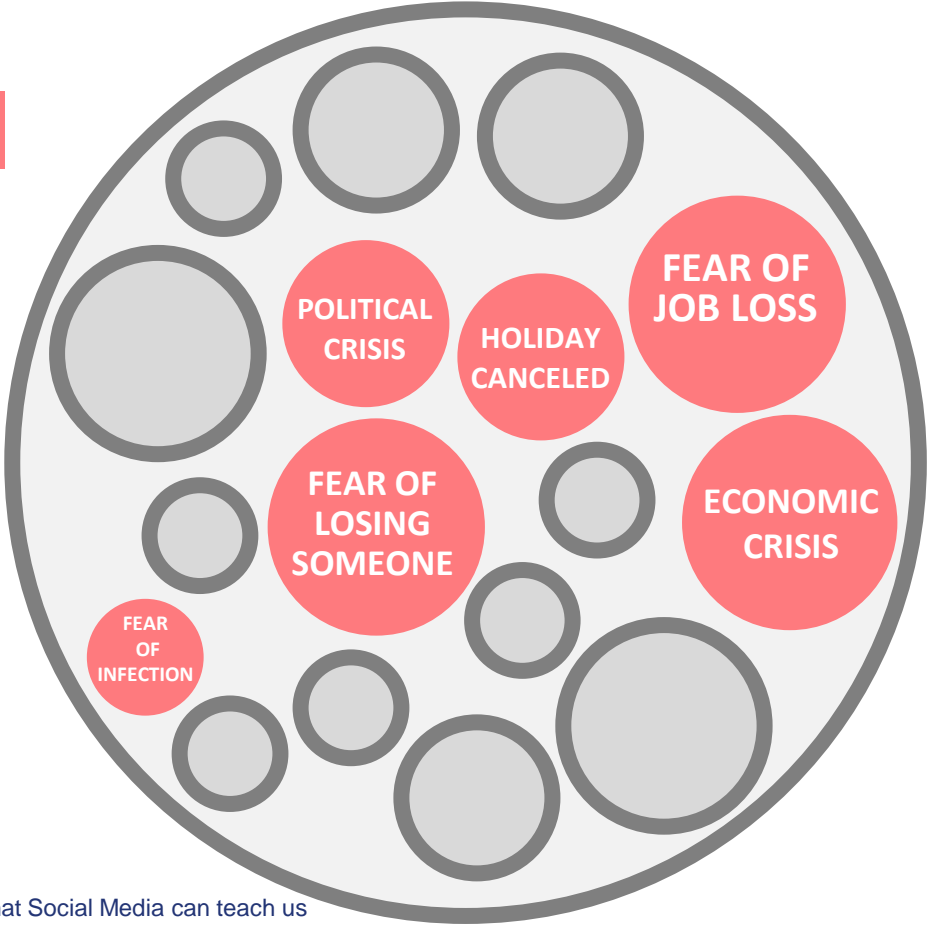
LESSON #3: A.I. DRIVEN SOCIAL INTELLIGENCE ENSURES CONSUMER CENTRICITY!

PEOPLE'S FEARS: SURFACING THE WHOLE SOCIAL INSIGHT SPECTRUM

TOP-DOWN & BOTTOM-UP

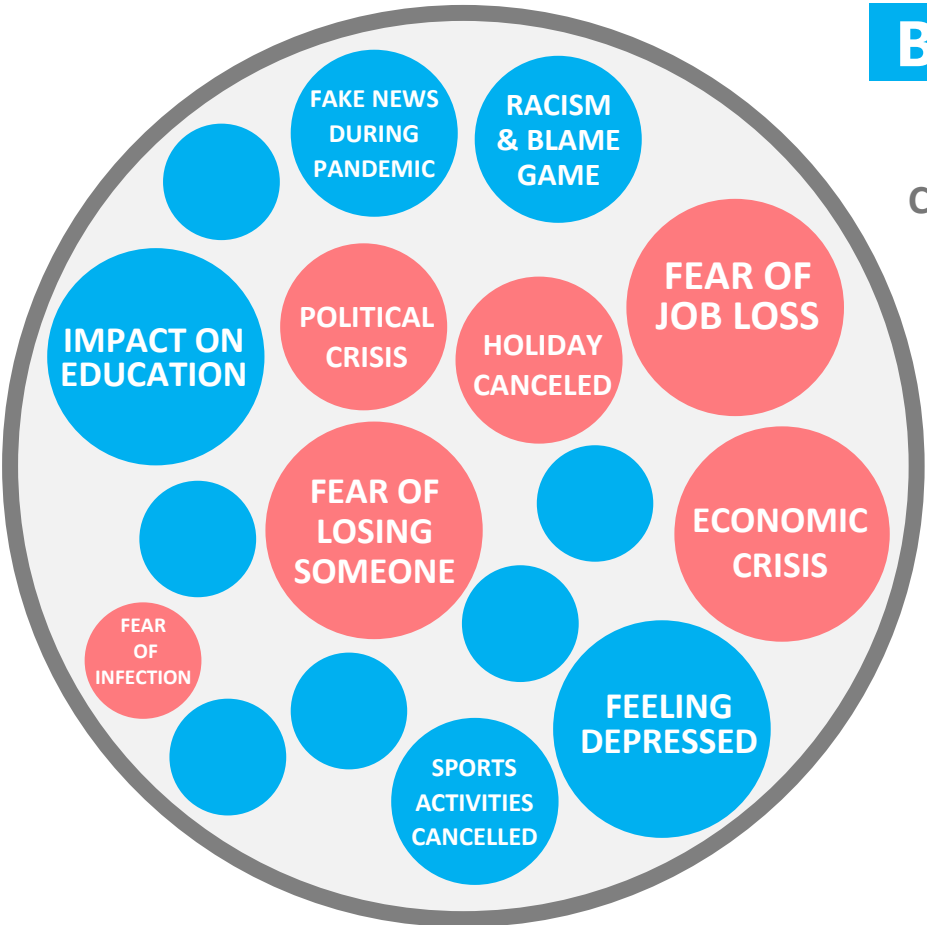
TOP DOWN

PREDEFINED ANALYTIC STRUCTURE TO MIRROR THE KPI'S FROM THE SURVEY



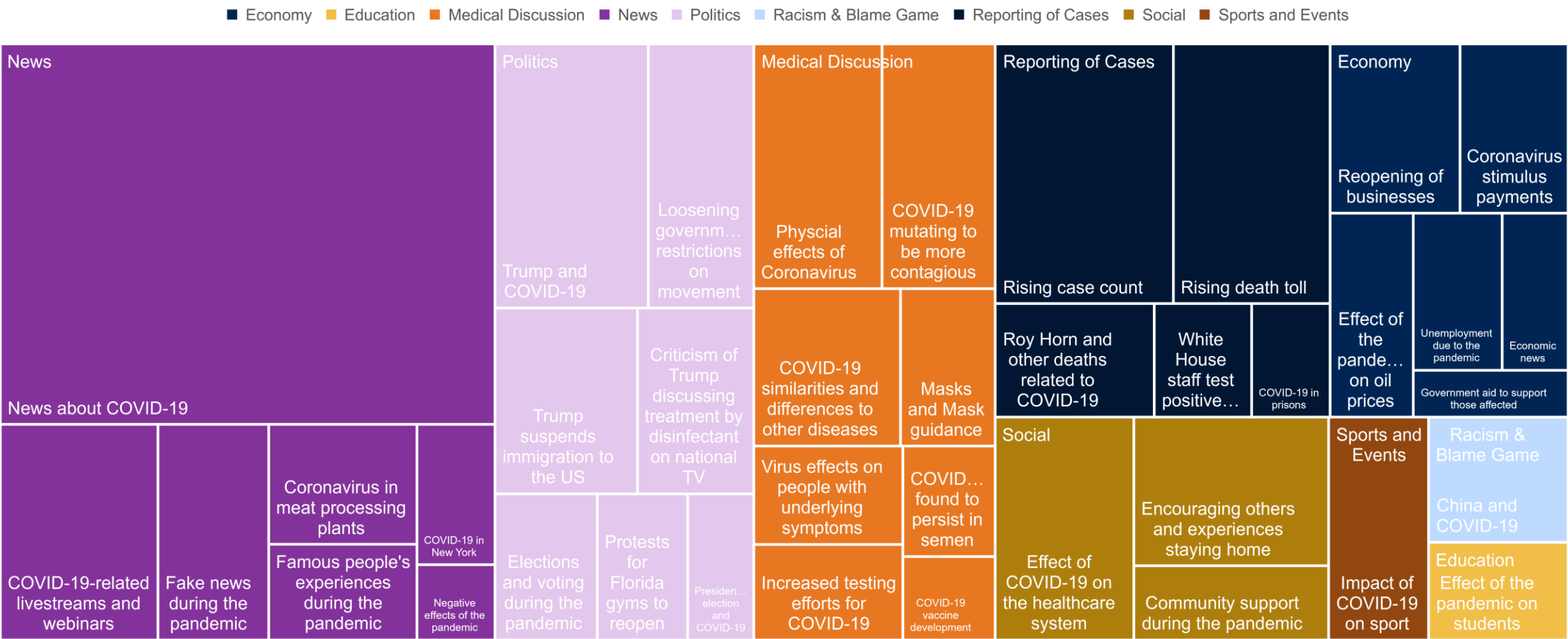
BOTTOM UP

CONSUMER-LED ORGANIC INSIGHTS TO UNEARTH TRENDS AND ONGOING 'UNKNOWN UNKNOWN'S'



LESSON #3: A.I. DRIVEN SOCIAL INTELLIGENCE ENSURES CONSUMER CENTRICITY!

DETAILED BOTTOM-UP TOPIC ANALYSIS – US CONVERSATIONS – MAY 1-15 2020



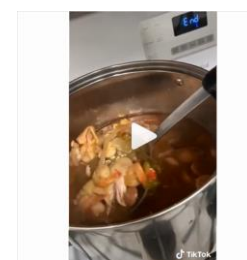
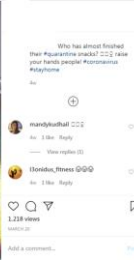
LESSON #4: SOCIAL INTELLIGENCE HELPS UNDERSTAND CHANGING BEHAVIOURS AS WELL!



Vitamin C MEGADOSING for Prevention of Illness & Coronavirus (Science)



Mega Costco Haul || Preparing for Coronavirus Quarantine || Family of Seven



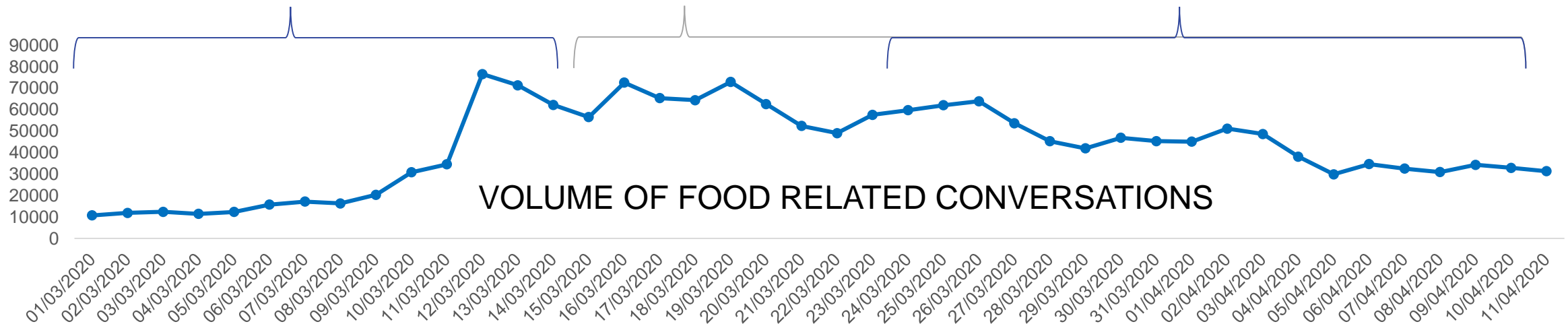
Food as an Immunity Booster

Stockpiling and Panic Buying

Quarantine Snacking

Reminiscing through Food

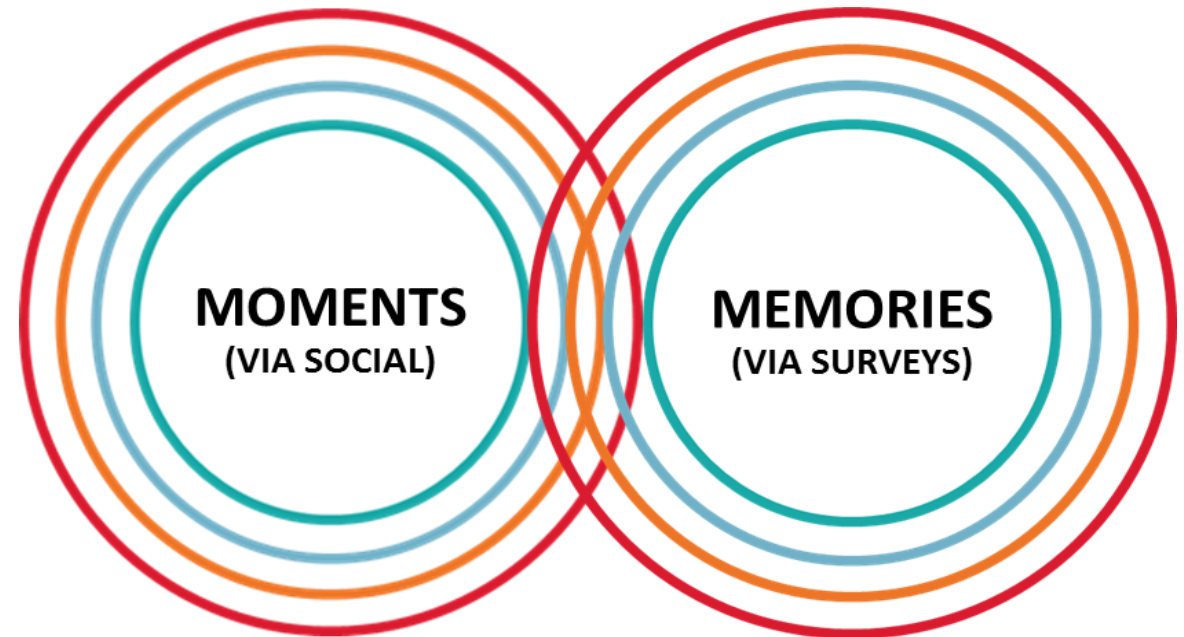
The Rise of the Home Chef



LESSON #5: INTEGRATING SURVEY RESEARCH AND SOCIAL INTELLIGENCE TO TAKE INFORMED DECISIONS

Survey data helps understand “**memories**”, i.e. equity which lingers and is expressed outside of the point of experience itself.

Social data on the other hand best expresses “**moments**”, i.e. context of usage, real-time, close to the point of experience, new brand routines...



SOME FOOD FOR THOUGHTS...

- Does the increasing demand for *fresh data* mean that all our **historical data** has become **irrelevant**?
 - ▶ No, but predictive modelling methods need to take care of the possible impact of the crisis.
- Consumers will continue to share, to react and won't stop scrolling.
 - ▶ This means that the volume of data to collect will continue to grow. Real-time data processing will be, more than ever, critical.
- In times of uncertainty and misinformation, **anecdotes are not data...**
 - ▶ But signals, even small at first sight, can have major implications and announce future trends. The need for integrating different sources of data is critical to ensure we are not biased by looking into just one direction...

THANK YOU

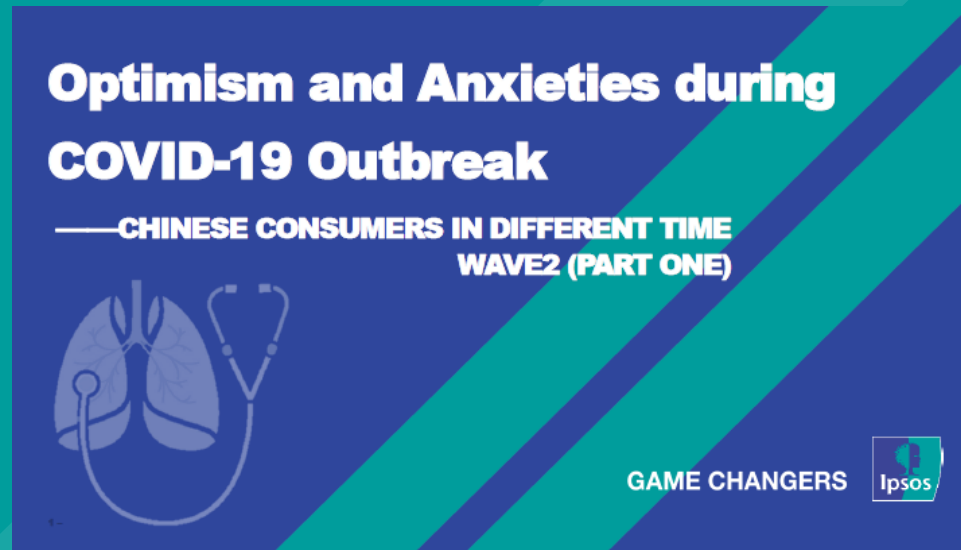
GAME CHANGERS



CHINA ENTERS A NEW PHASE

3

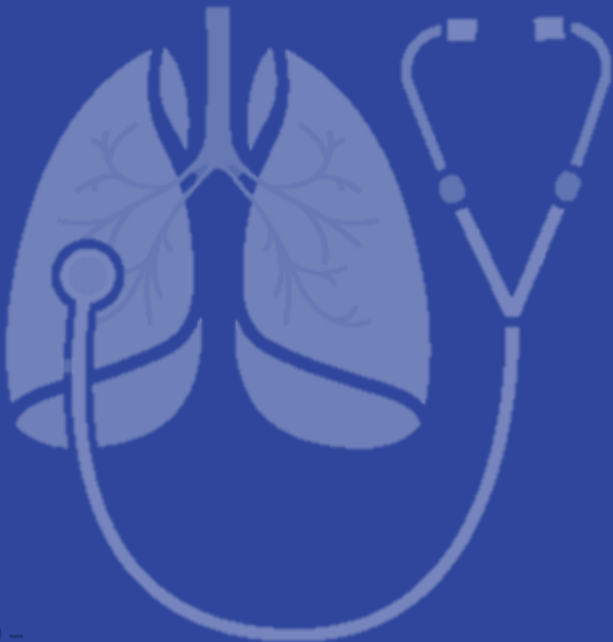
Yan Ho
Service Line Leader,
Channel Performance
Ipsos in China



Download the latest **Optimism & Anxieties** report on China [here](#)

UPDATES ON CHINA

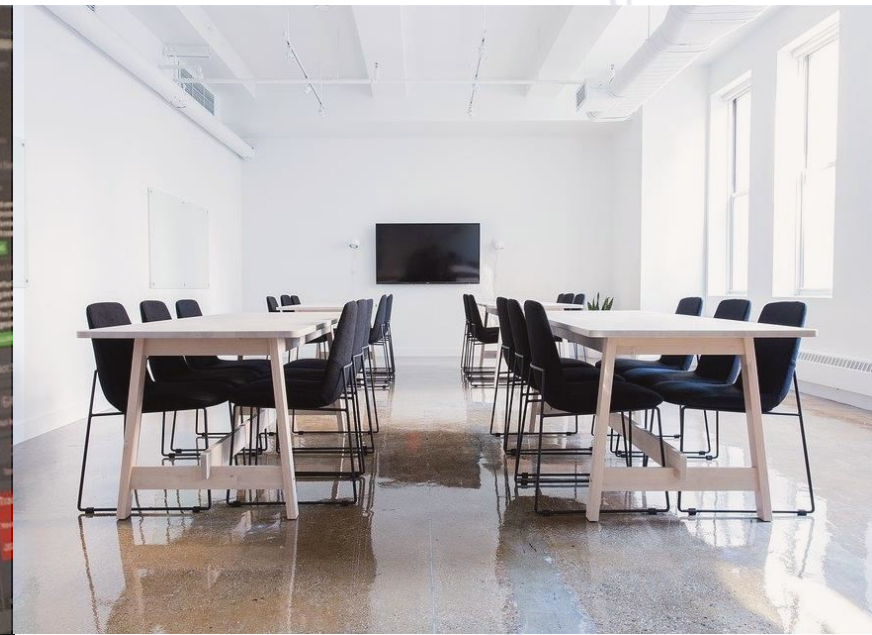
Love and Sorrow in the Epidemic Period
—— Chinese consumers wave2 study (Attitude Part)



GAME CHANGERS



SHARING FOR NEXT 10 MINS



1. Updates On Epidemic

2. The Impact

3. Resuming Work & Tips For Corporates

UPDATES ON EPIDEMIC



Life Is Starting To Return To Normal

70% of publics think the domestic epidemic will end by June, slightly greater confidence shown in lower tiers cities
Improvement in everyday needs fulfillment is obvious ,with situation being more under controlled & people more adapted to the new normal



Optimistic About End Of Epidemic

70%

Chinese Believe Domestic Epidemic Will **End By June**

Apr Wave N=2873

Fulfillment On Everyday Needs

Mostly Fulfilled
(>70%)

52%

Moderately Fulfilled (50-70%)

47%

Poorly Fulfilled
(<50%)

21%

81%

18%

1%

Feb

Apr

Feb Wave N=1512, Apr Wave N=3014

Taking Shanghai As An Example

Shopping malls, amusement parks, restaurants show good signs of traffic recovery



Re-opening Of Shanghai Disneyland



Mickey Mouse and friends could only welcome 24,000 people, in keeping with government rules to cap attendance



Disney has reopened its Shanghai Disneyland park to a reduced number of visitors, ending a more than three-month closure caused by the coronavirus outbreak.

China has seen declining virus cases for weeks and has been gradually easing restrictions.



A worker holds a sign reading: "Please maintain a respectful social distance from other guests"

Grand Opening Of Popeyes



In Fact, There Are Some Worries

Public's attention to the epidemic declined slightly vs. Feb

Mixed feelings towards re-opening of Wuhan and there are concerns on risk of imported cases



% People Concerned A Great Deal With The Epidemic

77% → 71%

Feb

Apr

Feb Wave N=1512, Apr Wave N=3014

Mixed Feelings Towards Re-opening Of Wuhan

34%

More happy than worry

Delights about traffic jams, queues in front of stores

12%

More worry than happy

Concerns about risk of asymptomatic carriers

Concerns On Risks Of Imported Cases



- 73% Chinese concern on imported cases
- 49% believes Government should encourage overseas Chinese to stay where they are, would be safer to focus on disease preventions

THE IMPACT



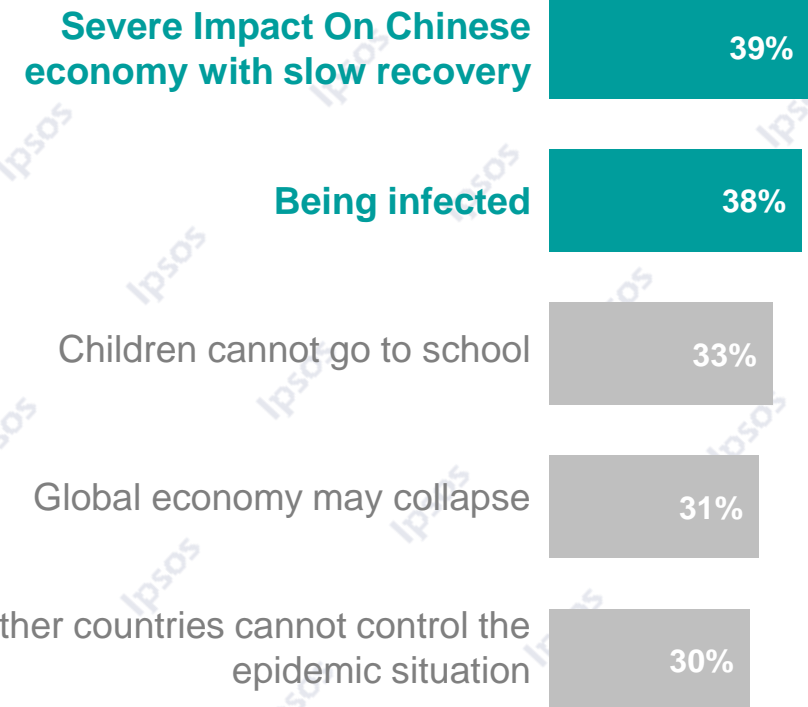
Top Worry On Impact Is The Economy

People mostly worried about impact of economy and being infected



The Most Worrying Impact Of The Epidemic

N=2989



Impact On Jobs And Incomes

During the epidemic period, 83% people experienced incomes impacted in some way
It also aroused concerns on career development & future opportunities



Impact On Income

83%

Impacted by at least one of following

- Performance Related Salary Reduction
- Fixed Salary Reduction
- Delayed Bonus
- Cancelled Bonus

Top Worry On Job



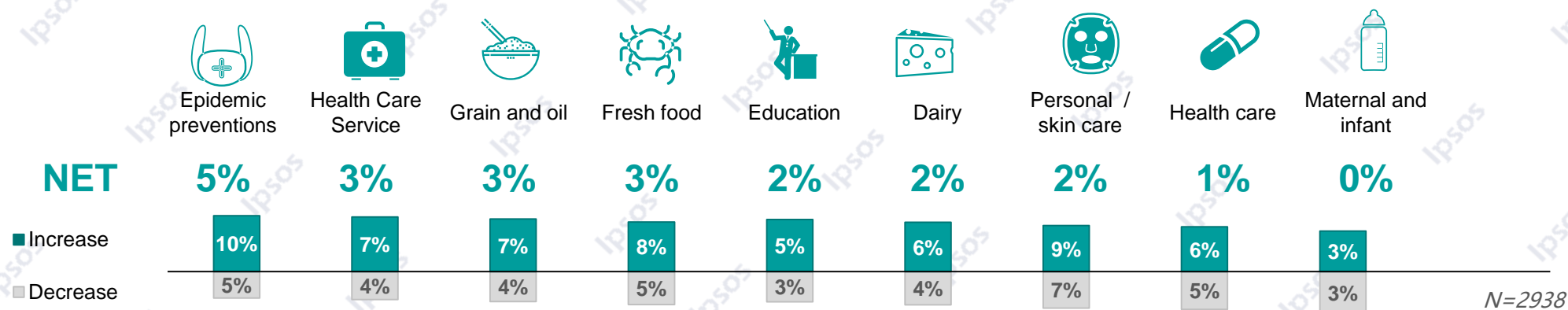
Impact On Share Of Wallets

People tend to **increase spending on Necessities** (health, diet, education)

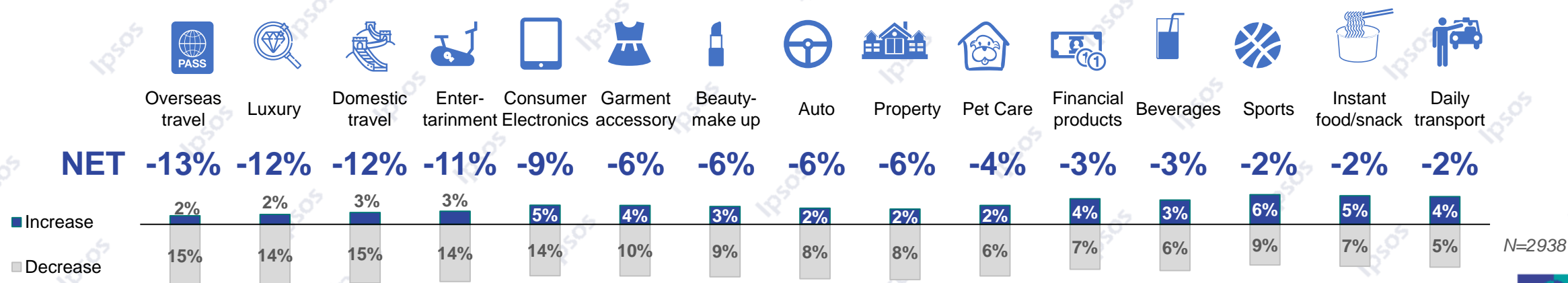
Decrease in Nice to Have (travel, luxury goods, entertainment, consumer electronics)



Will Increase Spending In The Future



Will Decrease Spending In The Future



RESUMING WORK & TIPS FOR CORPORATES

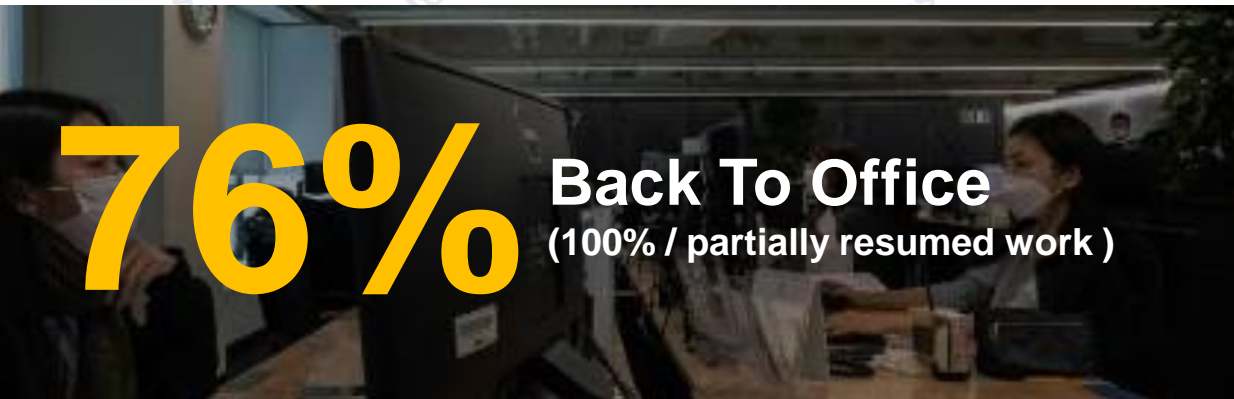
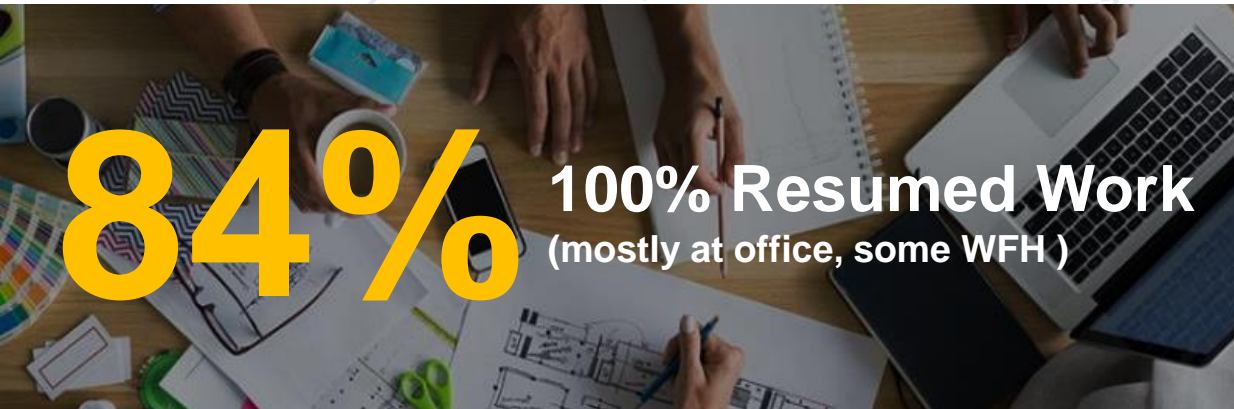




Both Epidemic Prevention And Resuming Work Are Important

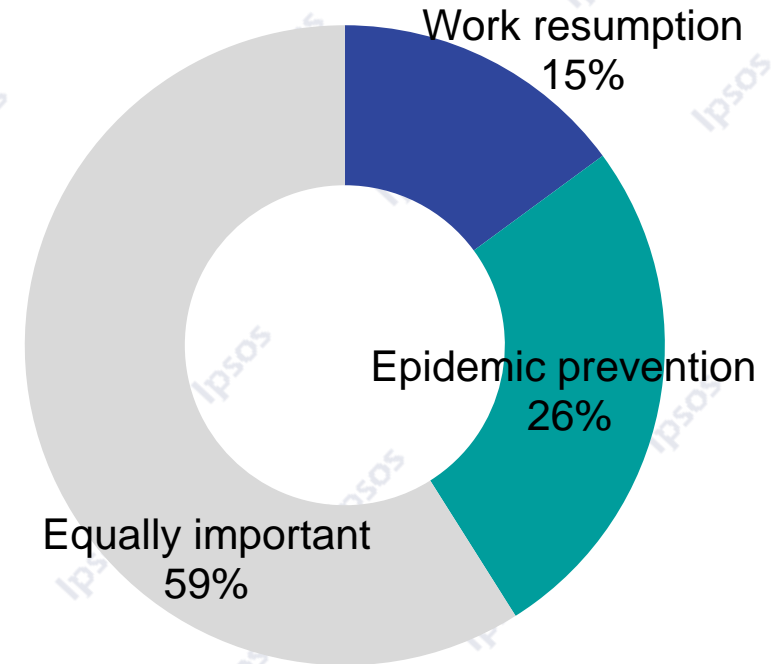
84% people completely resumed work, 74% people are back to office

60% publics believe that both of epidemic prevention and work resumption are important



Importance Of Epidemic Prevention & Work Resumption

N=2808



Major Ways People Deploy As Preventive Measures Upon Resuming Work

Keeping us away from the virus and boosting our immunity are the major directions people take



Personal Preventive Measures

N=1717

Washing hands frequently

59%

Wearing masks

58%

Exercise

56%

Adequate sleep

53%

Nutritional intakes

49%



Measures That People Wish Companies Could Deploy

Employees also hope companies to reduce the risk of reinfection by **providing masks & sufficient ventilations**



Measures Expected To Be Taken By Companies

N=1717

Provide masks

63%

Ventilation & Air Circulation

62%

Provide disinfection supplies.

60%

Track body temperature

59%

Quarantine 14 days if employees
come back from other places

54%



Public Wishes On Corporate Social Responsibilities

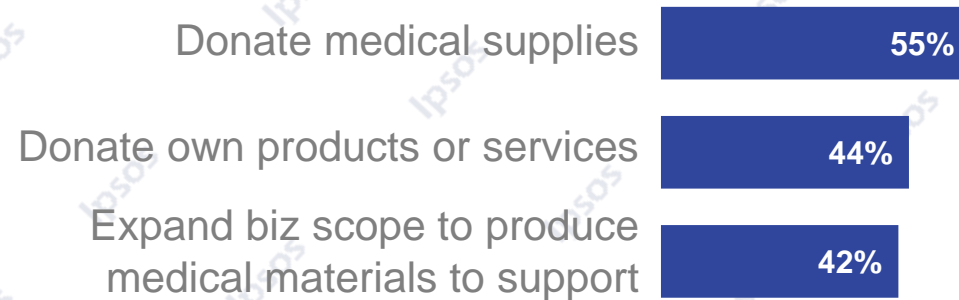
Donating medical supplies and own products received the most widespread attention

On CSR people wish companies to do, **protect your staff, protect your consumers, and they will protect your brand**



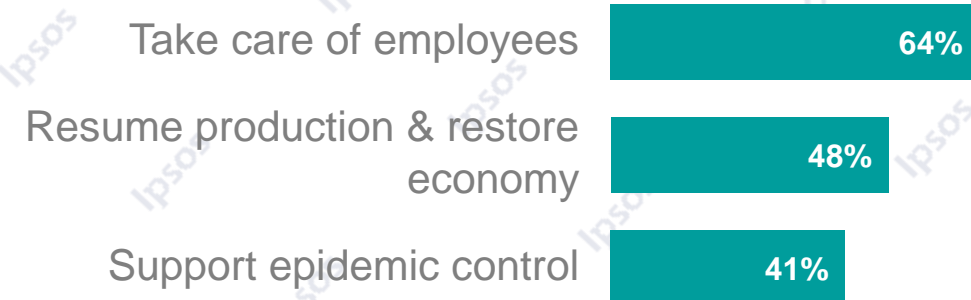
Company Actions Able To Draw Public Attentions

N=2984



CSR Actions People Wish Companies To Take

N=3012



Please follow [this link](#) to download the full Optimism and Anxieties report



**BE
SURE.
ACT
SMARTER.**

GAME CHANGERS



THANK YOU

INTRODUCTION

Jennifer Hubber, Head of Ipsos Global Client Organization

ATTITUDES & BEHAVIOURS: Latest updates

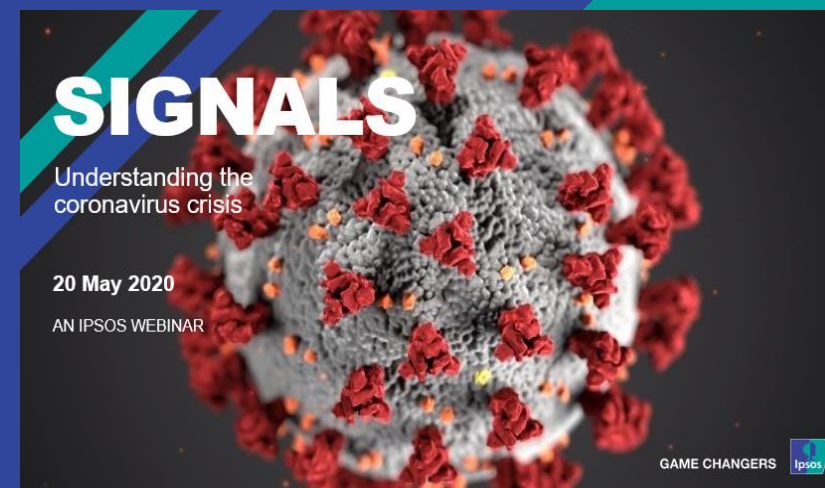
Simon Atkinson, Chief Knowledge Officer and
Sidar Gedik, CEO of Ipsos in Turkey

COVID CONVERSATIONS

Leendert de Voogd, Global Service Line Leader, Social Intelligence Analytics

CHINA ENTERS A NEW PHASE

Yan Ho, Service Line Leader, Channel Performance, Ipsos in China



ACCESS RECORDINGS OF PREVIOUS SIGNALS WEBINARS HERE:

[26 March](#)

[8 April](#)

[23 April](#)

[7 May](#)

NEXT WEBINAR:
Please join us on Thurs 6th June