

SIGNALS

And now what?

Lessons from the coronavirus crisis

AN IPSOS WEBINAR

September 10th, 2020

AGENDA

And now what?

INTRODUCTION

Jennifer Hubber

Head of Ipsos Global Client Organization

ADAPTATIONS AND ANXIETIES: The Public Mood

Simon Atkinson

Chief Knowledge Officer

THE ROLE OF CULTURE IN A GLOBAL CRISIS

Radhecka Roy

Global Service Leader, Strategic Curation

AFFORDABLE INDULGENCES: A little happiness goes a long way...

Colin Ho

Chief Research Officer, Innovation and Market Strategy & Understanding

REPACKAGING COVID: Clean, Green *and* Affordable?

Ian Payne

Global Service Leader, Pack Testing

SIGNALS

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coronavirus crisis

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GAME CHANGERS Ipsos

Watch the webinar
recording [here](#)
Explore Ipsos' COVID-19
hub page [here](#)

AND NOW WHAT? Anxieties and adaptations

1 THE LATEST: Consumer attitudes & behaviors



Things are perceived as 'out-of-control' in many countries and second wave worries are shared internationally



© (T2B Summary) To what extent do you agree or disagree with each of the following [Thinking about resuming normal activities after the pandemic makes me feel very anxious?] (n=14,518)
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2 WHAT'S NEXT? A pandemic-shaped recession? new documentary



3 TAKING STOCK Latest resources September Update

IPSOS UPDATE
A selection of the latest research and thinking from Ipsos teams around the world
September 2020

CORONAVIRUS: LATEST FROM THE COUNTRIES

UK	PERU	US	SOUTH AFRICA
 Ipsos MORI has published three new studies with Kings College London: - Continuation of lockdown : Half of the population (51%) say they would get a vaccine against coronavirus, if a vaccine is available. Opinion is more divided on whether a vaccine should be made obligatory. - Living with COVID-19 : 86% say they would find it acceptable for employees to choose where they work. - Who is most affected? : The public are twice as likely to say that the virus has had a more negative impact on men despite Ipsos women reporting feeling the stress.	 A new survey on COVID-19 myths and attitudes towards a vaccine finds that 70% of Peruvians would get a vaccine against Coronavirus, if a vaccine is available. Opinion is more divided on whether a vaccine should be made obligatory. Two-thirds of those surveyed (66%) believe the virus was created by people in a laboratory.	 The latest Ipsos-Anova Coronavirus Index finds that 58% of Americans know someone who has tested positive, a new high point, while 22% know someone who has died. Americans report being more likely to trust what Joe Biden says about coronavirus than President Donald Trump (46% vs. 31%). While levels of concern with the coronavirus remain high, the perception of risk is somewhat declining. Two-thirds (65%) say that returning to their pre-COVID lives is risky, down from 71% at the beginning of August.	 A recent webinar from our South Africa team explores the tension between the economic downturn and the COVID-19 pandemic. Comparing public opinion against other countries shows South Africans to be more pessimistic about where the country is heading and among the most anxious about resuming normal activities. The pandemic has negatively impacted an already struggling economy. Over three-quarters state that their job security/welfare has been affected, and unemployment is currently the country's top concern.

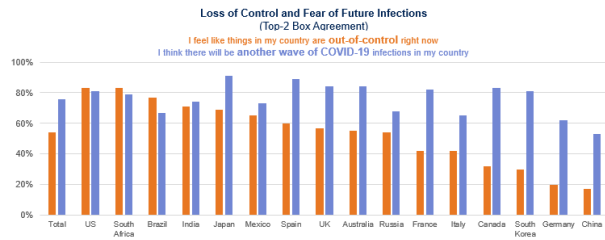
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CORONAVIRUS: LATEST FROM THE COUNTRIES



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IPSOS ESSENTIALS

Out of control?

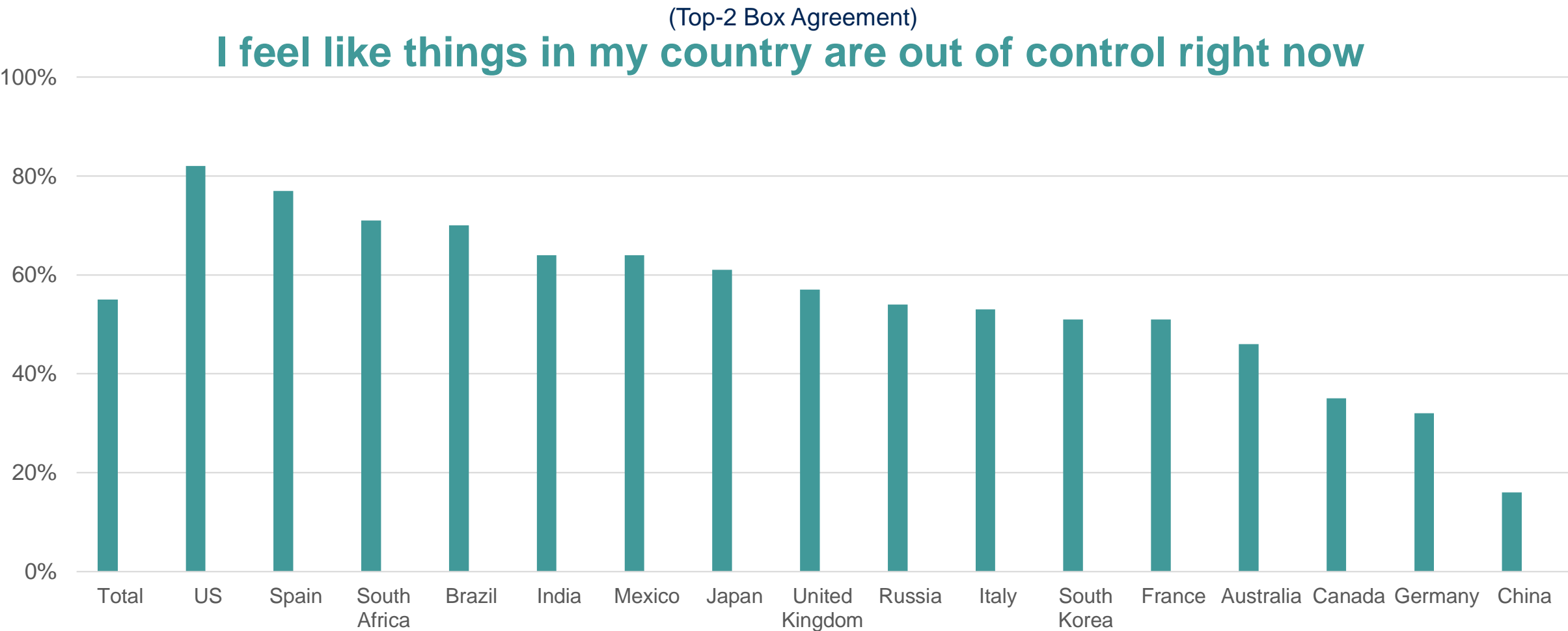
Follow [this link](#)
full details of
the study

GAME CHANGERS



Out of control? It depends where you are

With the election on the horizon and racial tensions high, U.S. citizens are the most likely to feel that things are out of control in their country right now..

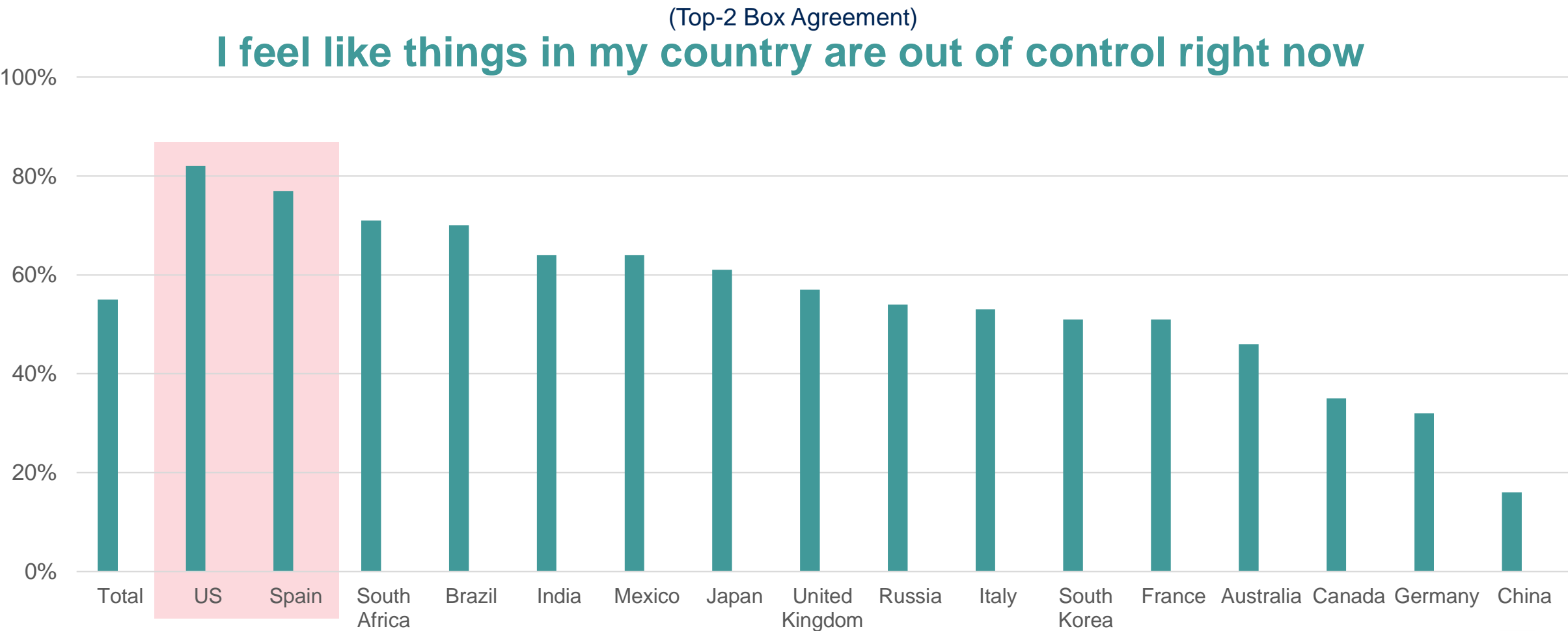


Q: (T2B Summary) To what extent do you agree or disagree with each of the following? [I feel like things in my country are out of control right now] [I think there will be another wave of COVID-19 infections in my country] (n=14501)

7

Out of control? It depends where you are

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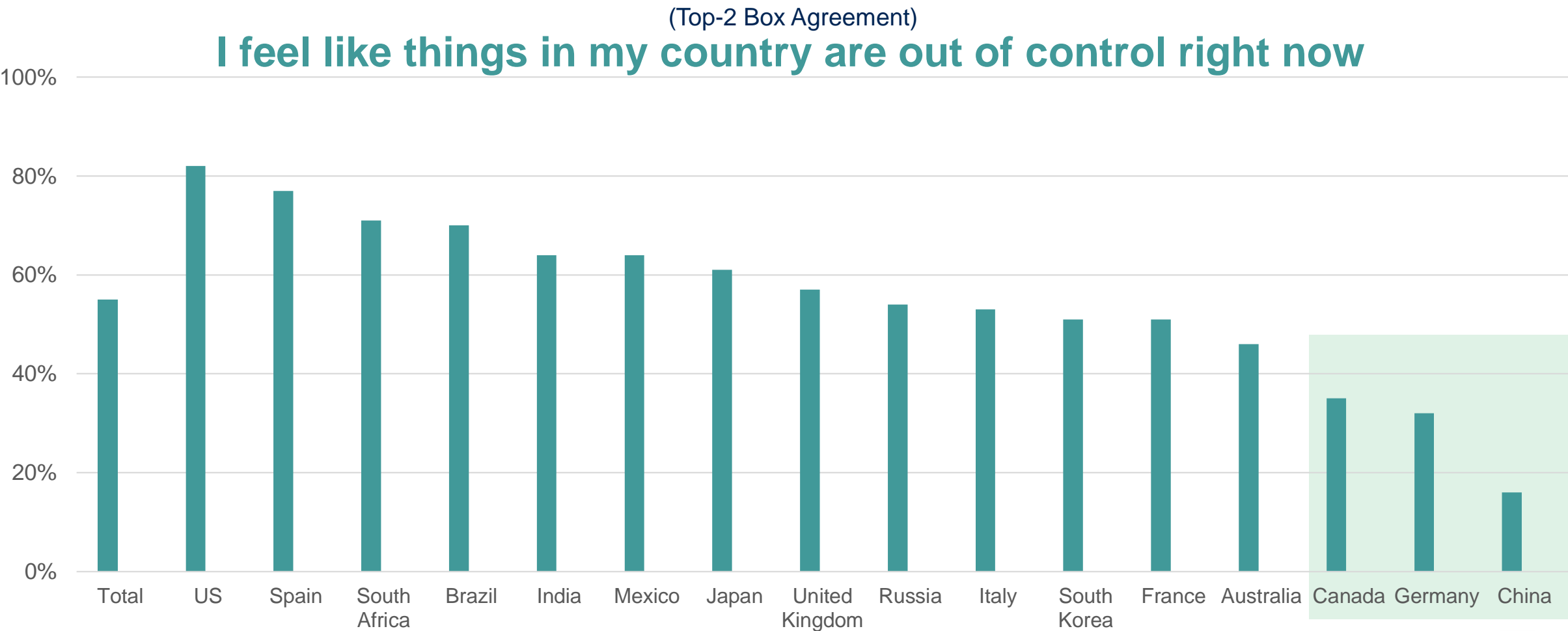


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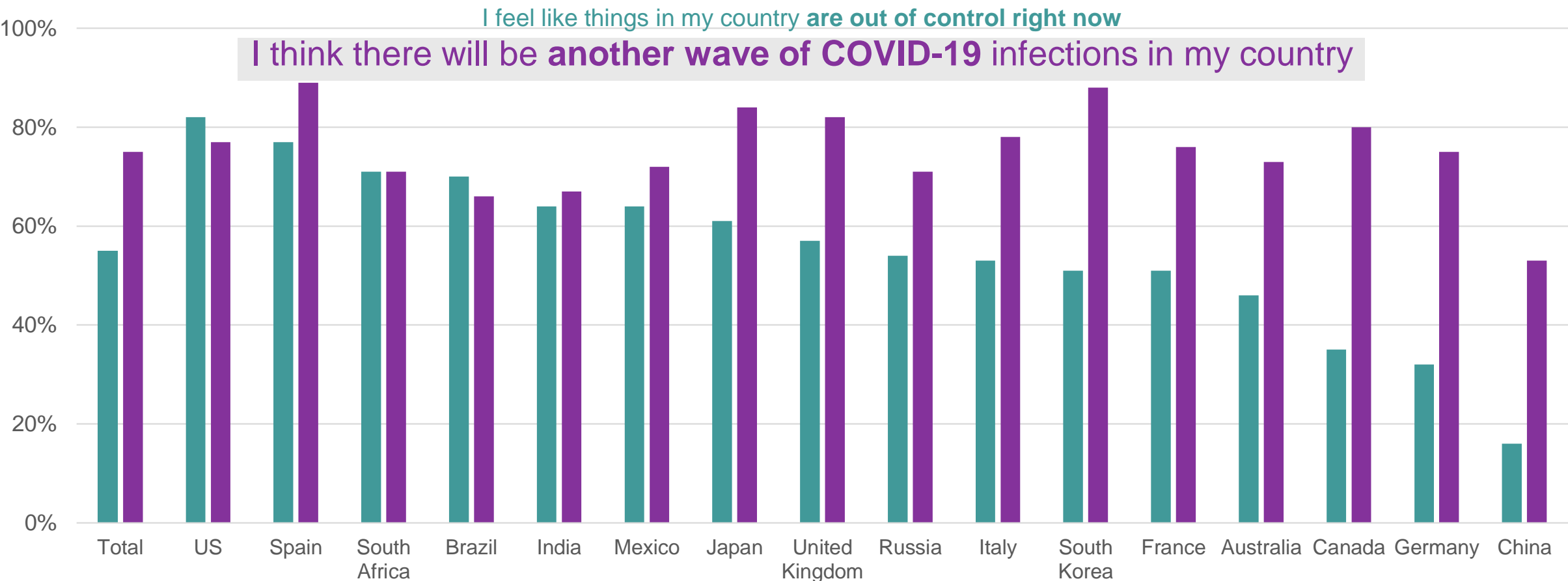
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9

Fear of a second wave? In most places

With the election on the horizon and racial tensions high, U.S. citizens are the most likely to feel that things are out of control in their country right now. **Widespread fear of a second wave is high almost everywhere.**

(Top-2 Box Agreement)



Q: (T2B Summary) To what extent do you agree or disagree with each of the following? [I feel like things in my country are out of control right now] [I think there will be another wave of COVID-19 infections in my country] (n=14501)

PHASES OF A CRISIS

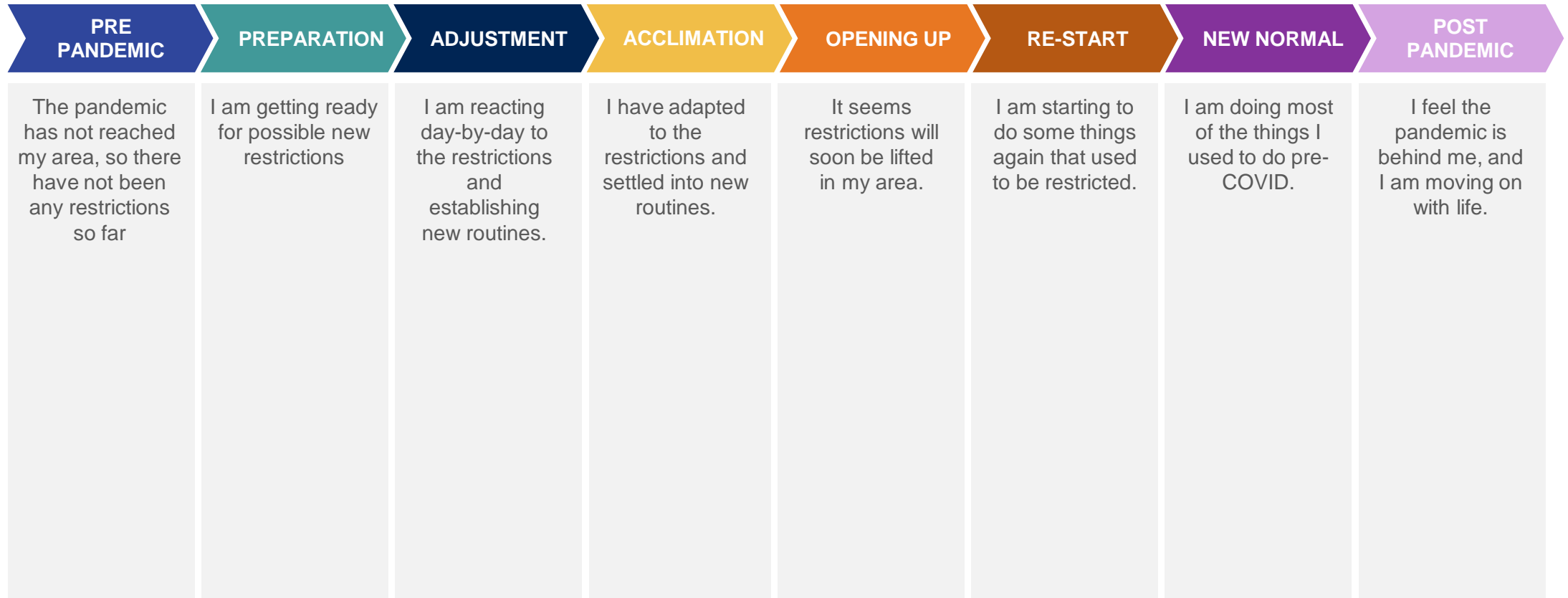
Where are we?



The phases of the crisis

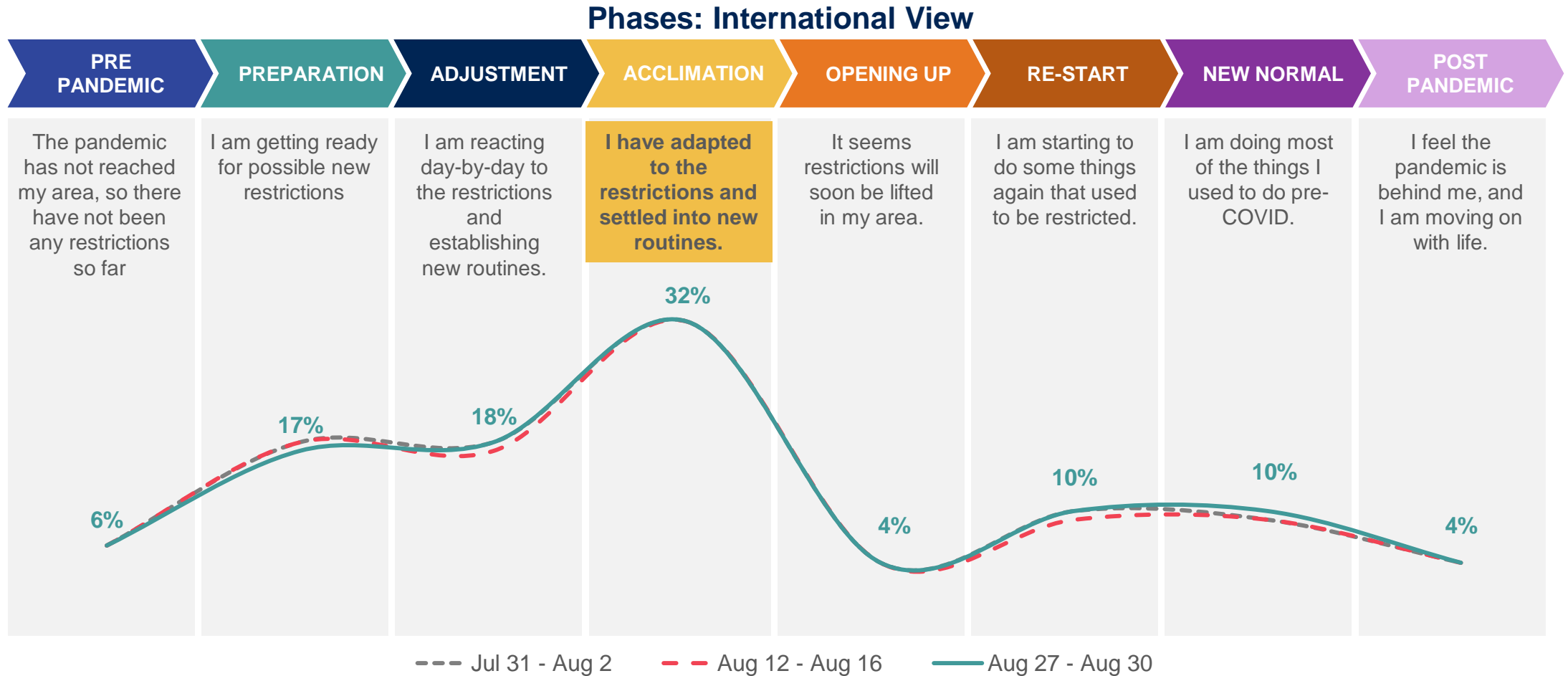
Q: There are often several phases or stages that people go through when times are hard. Which one of the following phases do you feel best describes your current situation regarding the covid-19 pandemic?

Phases: International View



The phases of the crisis: a picture of stability

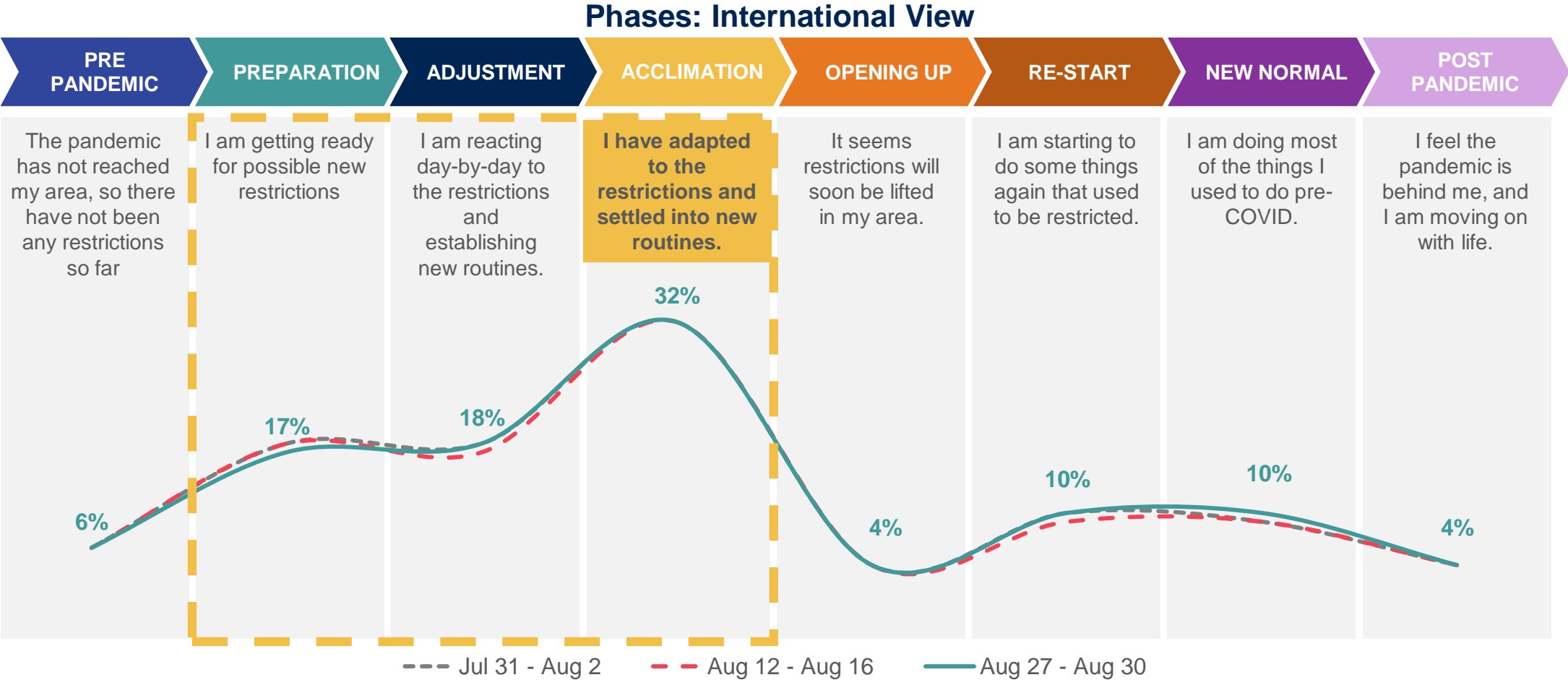
The “long middle” means that instead of doing things people would have done before restrictions, they are instead acclimatizing to the idea that restrictions will drive new routines.



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The phases of the crisis: a picture of stability

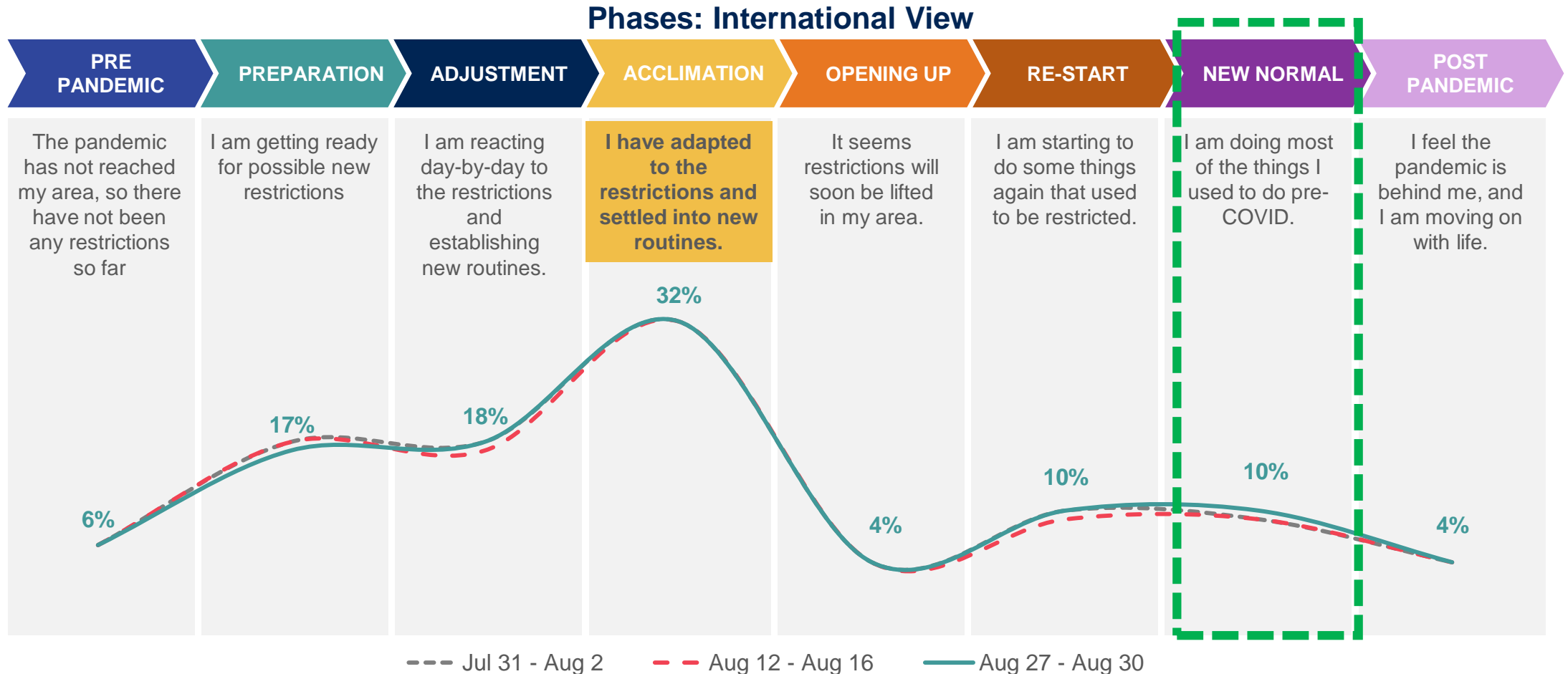
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The phases of the crisis: a picture of stability

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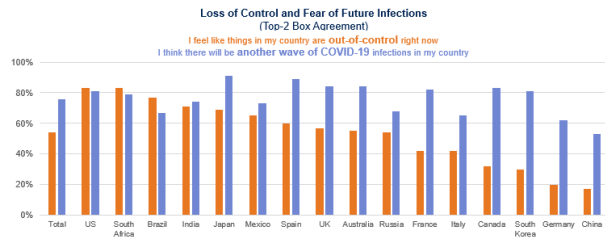
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CORONAVIRUS: LATEST FROM THE COUNTRIES



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What's Next? A world on pause



Many are uncertain about the future, struggling to make big decisions, take risks and make financial plans.



“For financial management, we would prefer conservative schemes with which the capital is guaranteed.”



“Everything is on hold. I am not willing to put anything into the market where I can’t get it because there might be another spike in the Fall.”



“I simultaneously tell myself there is money there to be spent – but on the other side I am afraid to be broke. So I’m stuck in the middle.”

“Should we live our lives to the fullest? Should we spend the money we have? I really don’t know.”

What's Next? A Pandemic-shaped recession?

BLINDSIDED is a 20min documentary about how the world stumbled into a pandemic, then tumbled into recession...



Watch Video Trailer

<https://vimeo.com/448365971/8384afd217>

Based on CovidWatch, an international digital ethnography research project looking at how the pandemic changed our lives.

For more on our respondents' journey, see feature with April Jeffries in our [July webinar](#).

"Right now, they say the virus is 'democratic'. However, the economic crisis is not democratic, and hits some people harder than others. That's why it's even more important to keep our world united"

Nando Pagnoncelli

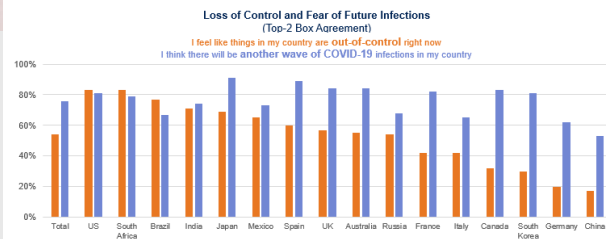
President, Ipsos Italy and
Social Commentator

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Spotlight 1: AFRICAN NATIONS

18 African Union Member states

August 2020 Fieldwork

[download here](#)



Partnership for Evidence-Based
Response to COVID-19

Responding to COVID-19 in African Countries:

Executive Summary of Polling Results: Cross National Findings

August 2020

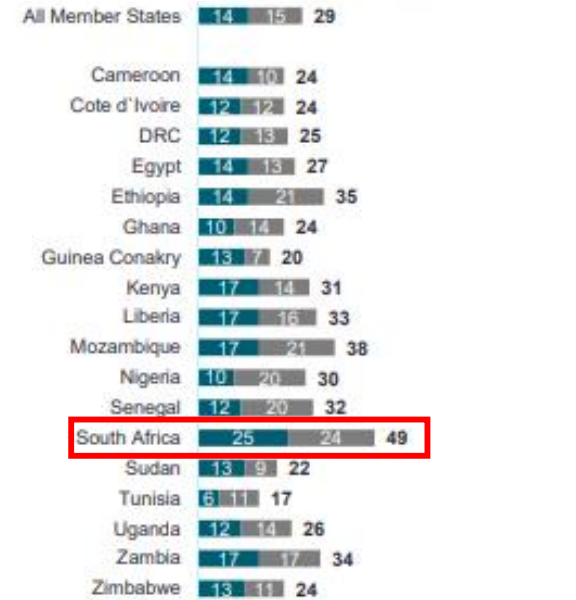


Perceived risk



Perceived risk of catching COVID-19:

■ % Very High ■ % High



% OF PERCEIVED RISK HIGHER AMONGST:

- Aged 26 to 55: 30%
- Household income >500K USD per month: 31%
- Report they or someone in their household had a COVID-19 infection: 41%

Q8. Please indicate what you think your level of risk of catching coronavirus or COVID-19 is: Very high, High, Medium, Low, Very Low, Don't know

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August 2020 Fieldwork

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Partnership for Evidence-Based
Response to COVID-19

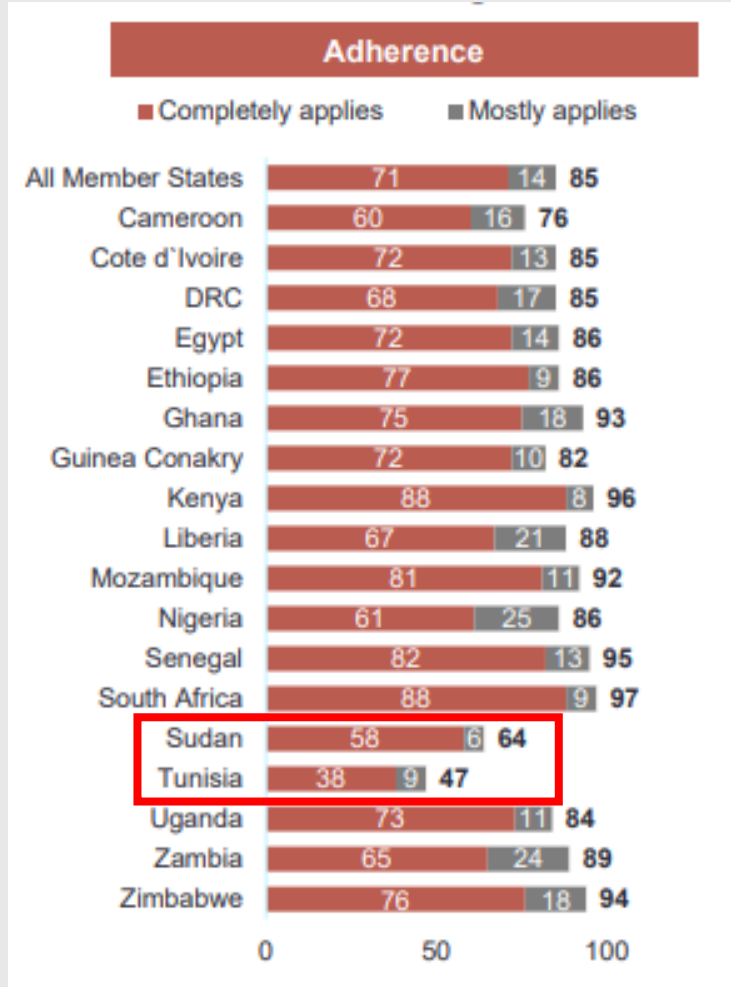
Responding to COVID-19 in African Countries:

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August 2020



Wearing face mask



Spotlight 1: AFRICAN NATIONS

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Partnership for Evidence-Based
Response to COVID-19

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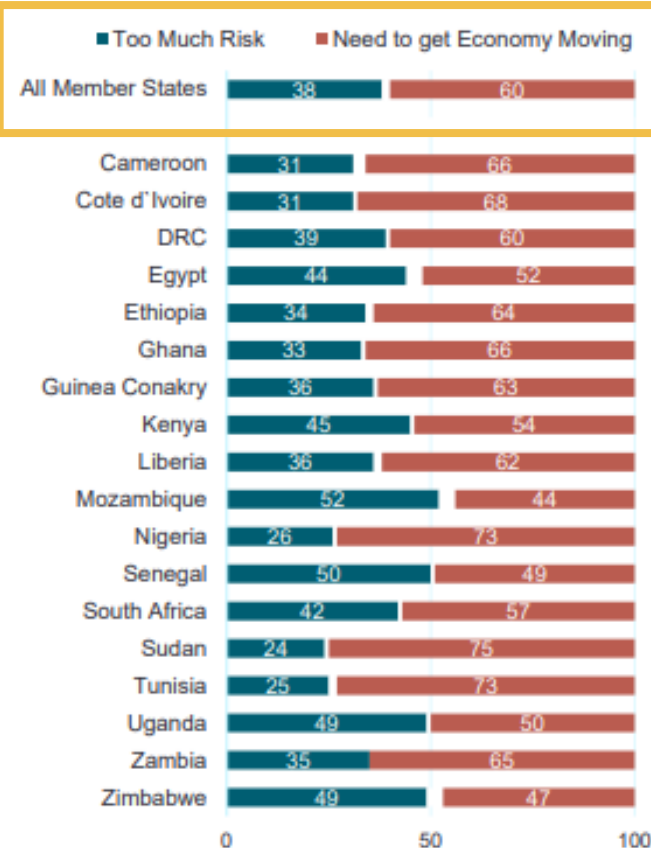
August 2020



Opening up economy



Trade off on loosening restrictions:
“too risky to loosen restrictions” vs. “there is
a low risk and need to get economy moving”



Spotlight 2: RUSSIA

Trend Vision report available here

Trend Vision 2020 Russia

The world is trying to understand the impact caused by the global COVID-19 pandemic. Uncertainty remains. We do not yet know if there will be a second wave or further consequences, and what our "new reality" will ultimately be.

In this issue of the annual Trend Vision report we talk about trends, signals of change and how to analyze them, in order to make the future, in which this crisis is not the last one, to be not a frightening «black box», but a platform for exciting experiments for successful brands and companies focused on long-term sustainability.

© Ipsos | Trend Vision 2020, Russia

A CRISIS LIKE NO OTHER,
AN UNCERTAIN RECOVERY

International Monetary Fund.
World Economic Outlook, June 24th 2020



Macro analysis

COVID-19 AND ITS CONSEQUENCES

Period of non-working days

To prevent the spread of coronavirus pandemic in Russia, non-working days were announced from March 30 to April 5, 2020.

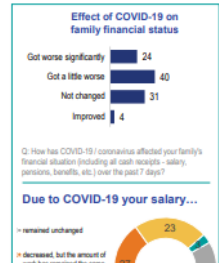
The period of non-working days, were workers didn't work, but kept their salary, was extended twice before ending on 11 May.

Drop in industrial production

The dynamics of the decline in industrial production in Russia in June on an annualized basis remained negative and almost unchanged compared to May 2020.*

The largest decline is in the commodity sector.

Dynamics of industrial production in Russia, %



PERCEPTION OF THE CRISIS DEPENDING ON THE STAGE OF A PERSON'S LIFE

Three out of four (75%) agree they live in dangerous and anxious times, but only 26% do not believe that they can change their lives. How does the perception of the situation change depending on their stage of life? The analysis is based on statements that most accurately reflect the behavior of the population in terms of the level of anxiety and readiness to act.

Calm - Active

Young people are ambitious and do not feel anxious, because they are not yet burdened with serious life obligations and have the "safety cushion" of their parents, with whom many still live with.

Anxious - Active

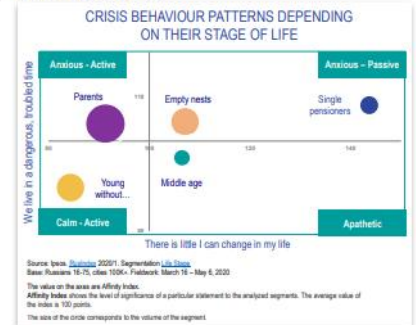
Parents, despite mild anxiety, are confident that they are the masters of their lives and are active.

Anxious - Passive

The Lonely Pensioners and Empty Nests groups are anxious but do nothing.

Apathetic

Middle-aged people without children are the only one of all segments to change their emotional state from calm-active to apathetic in a year.



© Ipsos | Trend Vision 2020, Russia



Consumer sentiment

Brand responses to the crisis



FLY AT HOME



Over 500 thousand people took part in the promotion.
We say thanks to each of you!

To explore the Ipsos Global Trends 2020 analysis, follow [this link](#)

Spotlight 3: UNDERSTANDING CULTURE

1 Cultural Response Bias [available here](#)



Figure 7 Components that influence an individual's score



2 Culture in a Crisis [available here](#)



"Without deeper cultural understanding, brands may struggle to identify some of the potential barriers to building meaningful, authentic and intuitive engagement."

SIGNALS

And now what?

2

THE ROLE OF CULTURE IN A GLOBAL CRISIS

An interview with Radhecka Roy



[Download](#) POV
[Listen](#) to “Insight Out”
podcast series



SIGNALS

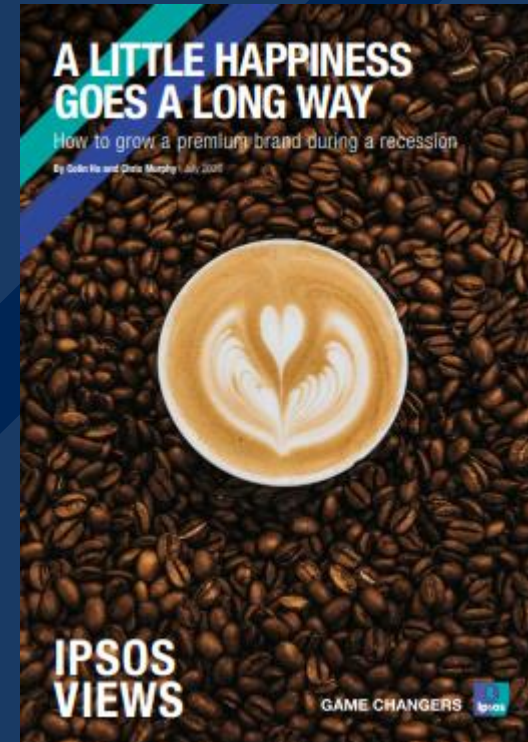
And now what?

3

A LITTLE HAPPINESS GOES A LONG WAY

Colin Ho

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the white
paper
[here](#)



A LITTLE HAPPINESS GOES A LONG WAY

How to grow a premium brand
during a recession

Colin Ho
Market Strategy and Understanding

September 2020





**DURING RECESSIONARY
TIMES, CONSUMERS
TIGHTEN UP THEIR
PURSE STRINGS**

CAN PREMIUM BRANDS SURVIVE?



HAPPINESS

**We all have a basic need of wanting
a little happiness in our life**

**AFFORDABLE
INDULGENCES CAN
NOT ONLY SURVIVE
BUT THRIVE**



Consumers may cross categories to save money...

"I still want my Starbucks"



\$4.09



\$4.99



\$7.29

\$16.36 for 4 cups a week

\$12.28 – many months!

...or change channel and find similar products to save money...

"I still want my steak"



Steak at restaurant = \$50



Premium steak at grocery store = \$20

Mark, T., Southam, C., Bulla, J., & Meza, S. (2016). Cross category indulgence: Why do some premium brands grow during recession? Journal of Brand Management, 23, 114-129.

...or downgrade to a more affordable indulgence

"I still want my YSL purse"



\$2,000



\$1,000

Clark, E., & Ignatenko, N. (2010). High Fashion in a recession. Ivey Business Review, 14.

**We all have a basic need of wanting
a little happiness in our life**



A black clothespin is hanging a white rectangular card from a thin, dark, twisted string. The background is a solid, light gray. The card is centered and contains the following text:

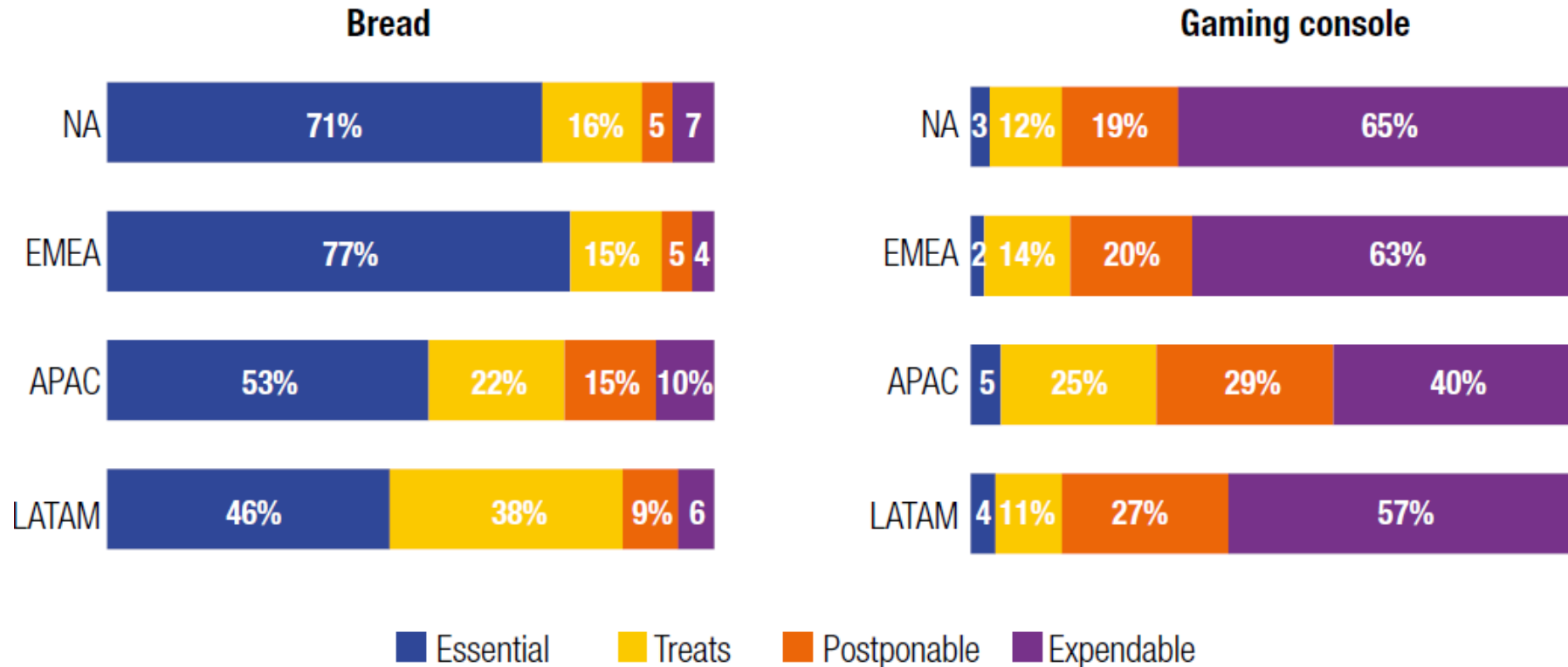
**Is your brand/product
considered an
affordable indulgence?**

Knowing whether your product category/brand is viewed as an affordable indulgence is the first step

ESSENTIALS	TREATS	POSTPONABLES	EXPENDABLES
Necessary for survival	Indulgences whose immediate purchase is considered justifiable	Purchase can be reasonably put off	Unnecessary
Fresh Vegetables/Fruit Eggs ...	Candy/sweets Chocolate Ice cream Savory snacks (chips, crisps, pretzels) Nutritional bars/snacks Juice Carbonated/fizzy drinks Premade meals (frozen meals/pizza, delivery)	Furniture Kitchen appliances ...	Jewelry, accessories High end electronics ...

Source: Ipsos Global Essentials Report Wave 5, June 4-6

What is considered an affordable indulgence can vary by market and segments

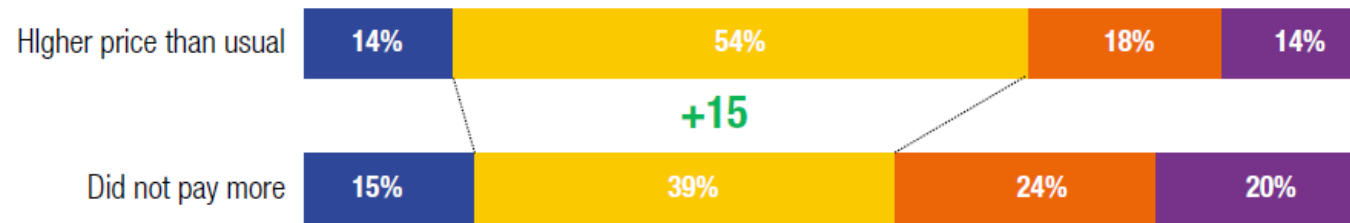


Source: Ipsos Global Essentials Report Wave 6, June 11-14

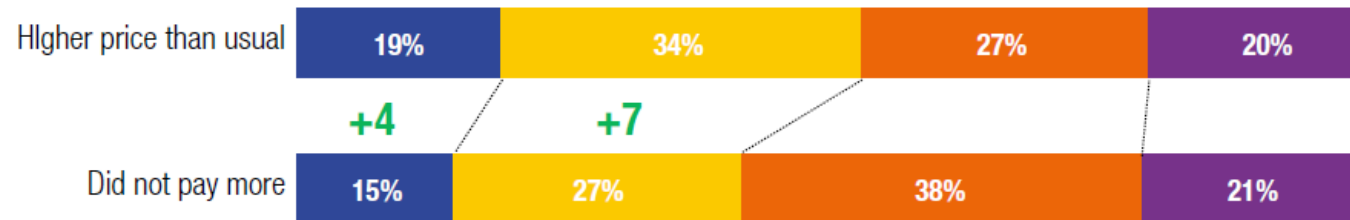
Even as covid-19 induces a recession, consumers are willing to pay more for a treat



Categorization of beer, among people paid more / not more for beer



Categorization of make-up, among people paid more / not more for beauty products



■ Essential ■ Treats ■ Postponable ■ Expendable

Source: Ipsos Global Essentials Report Wave 8, June 25-28

**IS THERE AN
OPPORTUNITY FOR
YOUR PREMIUM BRAND?**



A little happiness goes a long way



Premium Brands viewed as **affordable indulgence** will do better during recessionary times



Discover whether your brand is viewed as an affordable indulgence, by whom, and in which markets



Position your brand as an affordable indulgence, or **introduce** a new brand positioned as one

SIGNALS

And now what?

REPACKAGING COVID

Ian Payne

Download
the white
paper
[here](#)

4





CLEAN, GREEN AND AFFORDABLE



REWIND

Brands bringing change driven by sustainability, changing retail...

Transparency



Less Is More



Different For Ecommerce



Refill With Pride



Do Your Bit



Heavy Engagement



Old Material In New Places



Plastic Out



Partnerships



Graphic Design





Base: 19515 online adults under the age of 75 across 28 countries.
Fieldwork dates: July 26th-Aug. 9th 2019

© Ipsos

WE EXPECT MANUFACTURERS TO TAKE LEADERSHIP

For example, in end of life...



Manufacturers should be obliged to help with the recycling and reuse of packaging that they produce

HOW MIGHT PACKAGING BE IMPACTED GOING FORWARD?

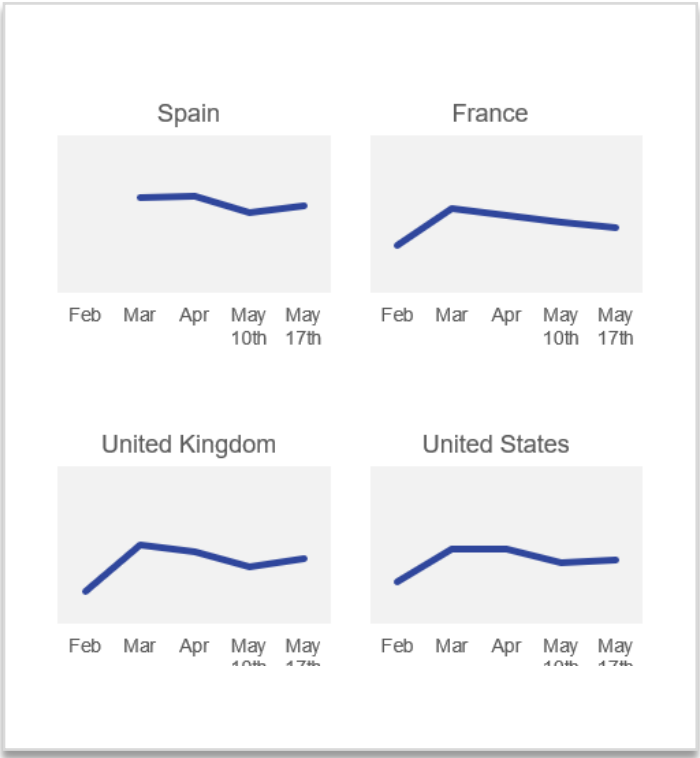
Clean?



Green?



Affordable?



BEHAVIOUR HAS OF COURSE CHANGED. 37% CLAIM TO HAVE DISINFECTED OR WASHED PRODUCTS

Q. In the last few weeks, have you done any of the following? Select all that apply.

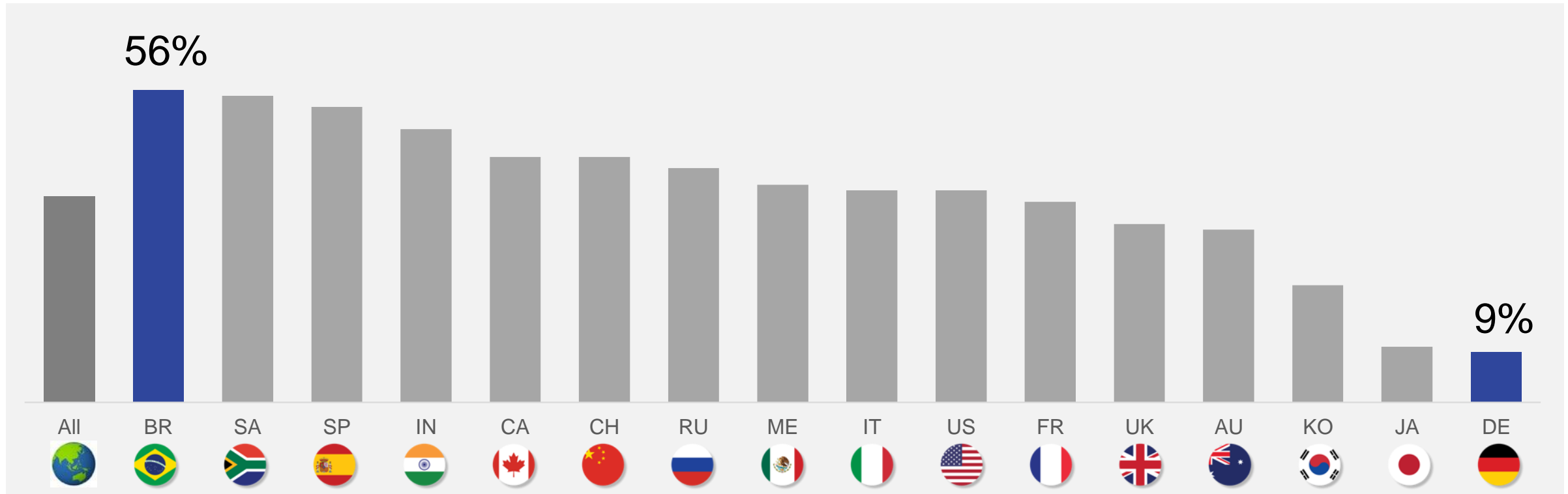


Base: GLOBAL RESULTS (16 COUNTRIES); May 10 TO 14

WASHING BEHAVIOUR VERY COUNTRY SPECIFIC

Q. In the last few weeks, have you done any of the following? Select all that apply

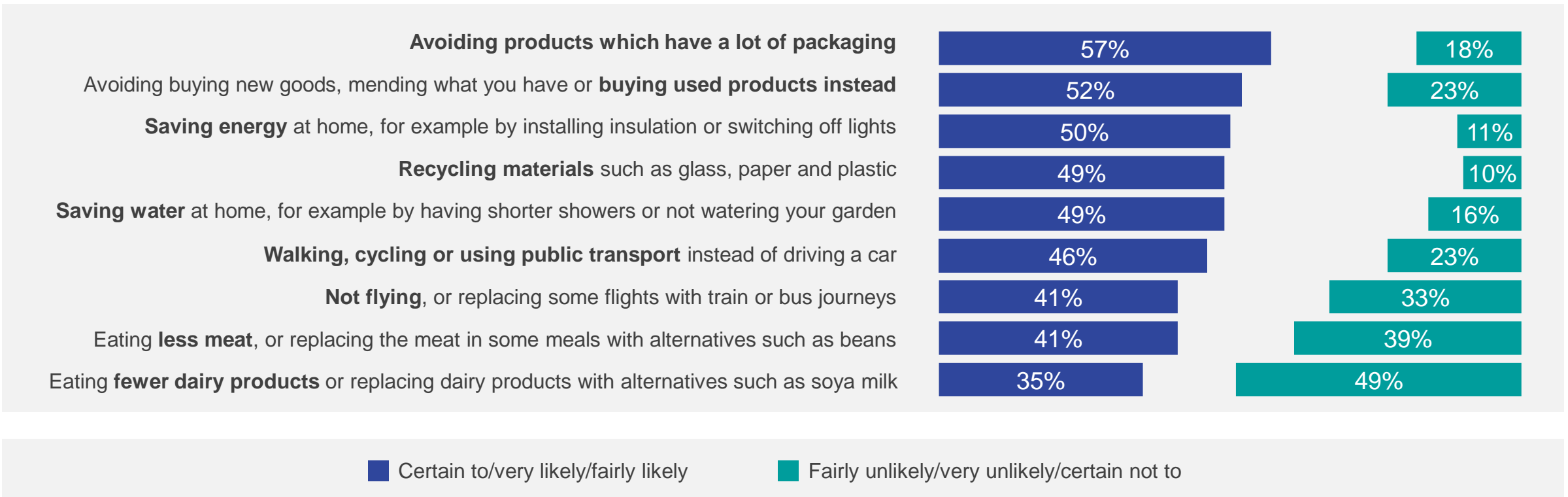
Disinfected or washed products that are in plastic or other packaging



Base: GLOBAL RESULTS (16 COUNTRIES); May 10 TO 14

PACKAGING CHOICE PERCEIVED AS #1 PERSONAL CONTRIBUTION ON CLIMATE

Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year



Base: 20,590 online adults aged 16-74: Fieldwork dates : Friday, February 21 to Friday, March 6, 2020



Base: GLOBAL RESULTS (14 COUNTRIES); APRIL 16 TO 19

PEOPLE WANT TO BELIEVE THEY WILL ACT RESPONSIBLY



I will seek out products that
are healthier and better for
the environment

BUT PRICE MATTERS MOST

Q. When comparing household products of similar quality and features, which two of the following are most important to you when making a final purchase decision?



Base: GLOBAL RESULTS (16 COUNTRIES); May 10 TO 14

ESTABLISHED CLAIMS BEAT STRONG COVID-19 CLAIMS

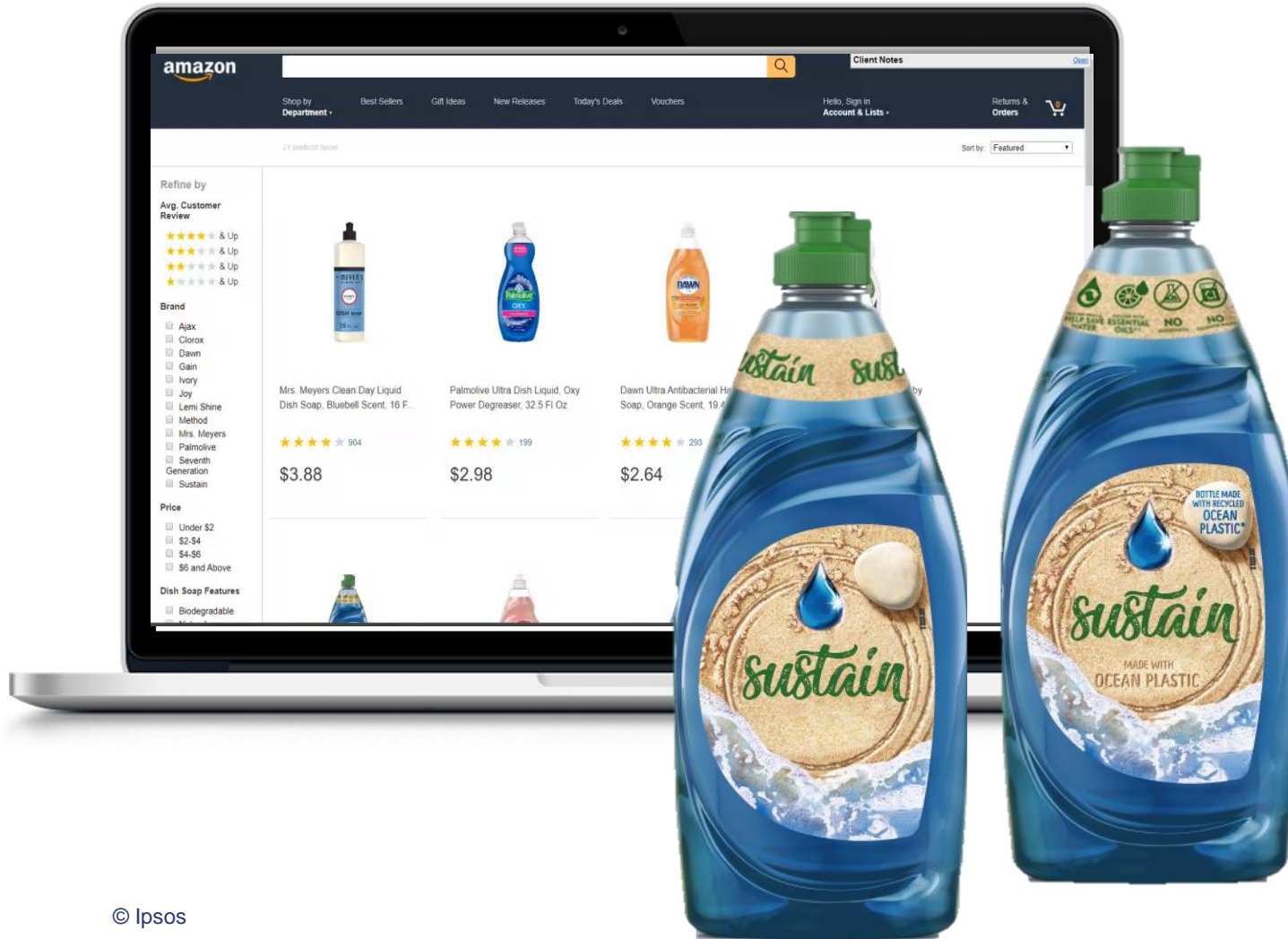


Claim tested	Promise
Wholesome and natural	142
100% biodegradable packaging	141
No additives or artificial ingredients	125
Helps you sleep better	124
Provides your family with immunity boost they need	116
Calms your mood and helps relieving stress	113
Made with FAIR TRADE certified ingredients	111
Packaging made from 100% recovered ocean plastic	109
Contains the best mix of vitamins your immunity system depends on	108
Improves your cardiovascular system functions	106
Helps the local community	106
Helps with memory and cognitive functions	106
Gives you the energy and strength you need	106
Packaging uses less material and is better for the environment	106
Packaging keeps food fresher for longer	106
Helps you recover faster after illness	105
Has a very long expiration date	104
Remains fresh taste even when stored for a long time	103
Made with organic ingredients	103
Manufactured under the highest health and sanitation standards	99
Improves your respiratory system functions	96
High in antioxidants	94
Made from carbon neutral packaging	91
Completely plant based	90
Packaging uses less material to keep price low	90
Balance gut microbiome to promote overall health	87
Made with non-GMO ingredients	86
Packaging "smart labelling" tells me if product contaminated	72
With nutrients to help feel fresher after hours in front of a screen	70
Packaging made from 100% new plastic for extra safety	68
Packages made with anti-viral materials	61
Packaging specially designed for home delivery	57



Claims touched on health, packaging, sustainability, ingredients and product benefits. The intent is to consider 'new to the world' claims which might be relatable to COVID-19 themes

SUSTAINABILITY DRIVES INTEREST BUT WATCH PRICE

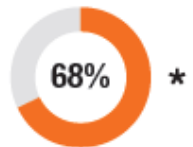


1. Overall Appeal

4 stars or higher
(5 point scale):



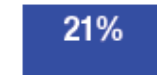
No claim



Sustainable claim

2. Spontaneous Likes

% mentioning sustainability claims
e.g. "Environmentally friendly",
"Ocean plastic", "Recycling" etc.



No claim



Sustainable claim

3. Behavioural Trial

1%
No claim
\$4.25

3%*
Sustainable claim
\$4.25

2%
Sustainable claim
\$4.75

1%
Sustainable claim
\$5.25

* Significantly higher

CONCLUSIONS

1

Disruption due to hygiene is real but more related to management of own behaviour

2

Sustainable development remains absolutely relevant even in Covid-19

3

More than ever, sustainability shouldn't come with a premium or a compromise



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INTRODUCTION

Jennifer Hubber

Head of Ipsos Global Client Organization

ADAPTATIONS AND ANXIETIES: The Public Mood

Simon Atkinson

Chief Knowledge Officer

THE ROLE OF CULTURE IN A GLOBAL CRISIS

Radhecka Roy

Global Service Leader, Strategic Curation

AFFORDABLE INDULGENCES: A little happiness goes a long way...

Colin Ho

Chief Research Officer, Innovation and Market Strategy & Understanding

REPACKAGING COVID: Clean, Green *and* Affordable?

Ian Payne

Global Service Leader, Pack Testing

SIGNALS

And now what?

Lessons from the
coronavirus crisis

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