

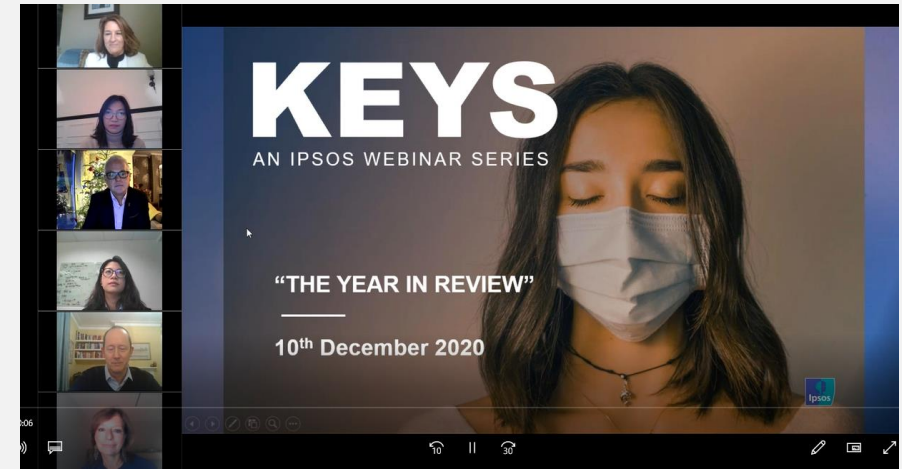
# KEYS

AN IPSOS WEBINAR SERIES

“THE YEAR IN REVIEW”

---

10<sup>th</sup> December 2020



Watch the recording [here](#)



# AGENDA

## INTRODUCTION

Jennifer Hubber

Head of Ipsos Global Client Organization

## LIVES DISRUPTED: What's New?

Simon Atkinson

Chief Knowledge Officer

## CHANGING CONTEXTS

Jim Needell

Country Chief Client Officer, Ipsos in the UK

Claudia Meillat

Global Head of Analytics, Brand Health Tracking, Ipsos

## SPOTLIGHT ON CHINA

Kelly Yin

Service Line Leader, Qualitative, Ipsos in China

## DEFINING MOMENT? The story (so far) of the coronavirus vaccine

Jackie Ilacqua

President, Syndicated Services, Healthcare, Ipsos



Follow [this link](#) to access resources from the webinars in this series



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**Simon Atkinson**

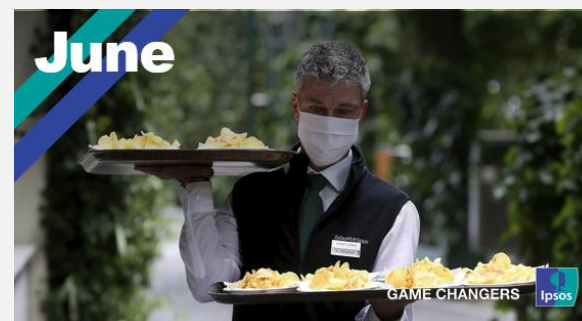
Chief Knowledge Officer



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# A New Year 1



# 2020 Predictions Survey

*Fieldwork dates*

**26 November –  
6 December  
2019**



# Ipsos Predictions 2020 Survey

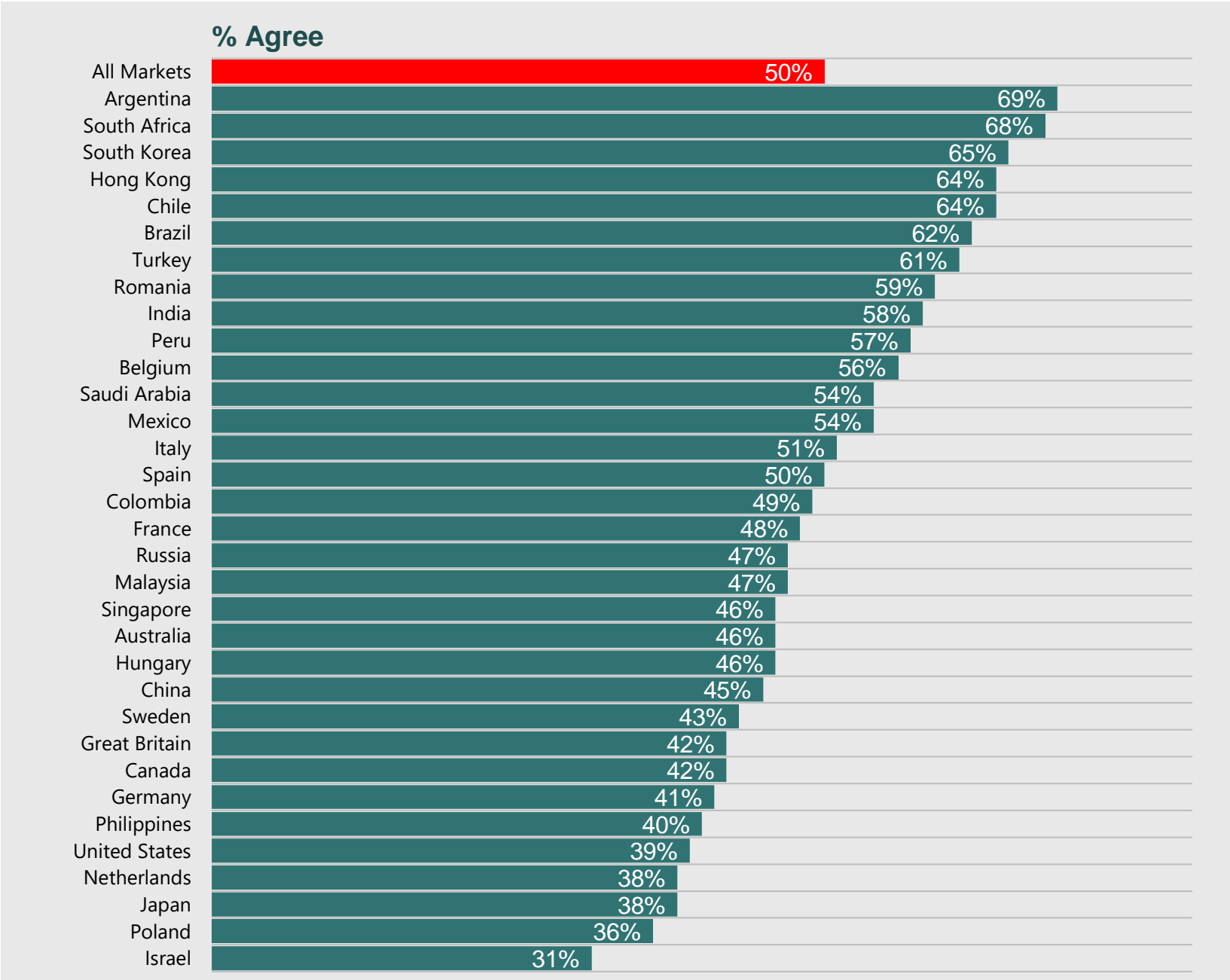
Please indicate if you agree very much, agree somewhat, disagree somewhat or disagree very much with the following statements:

50%

2019 was a **bad year** for me and my family



**Base:** 22,512 adults aged 16-64 across Argentina, Australia, Belgium, Brazil, Canada, Chile, China, Colombia, France, Germany, Great Britain, Hungary, India, Israel, Italy, Japan, Malaysia, Mexico, Netherlands, Peru, Philippines, Poland, Romania, Russia, Saudi Arabia, Singapore, South Africa, South Korea, Spain, Sweden, Turkey and the United States.



# Ipsos Predictions 2020 Survey

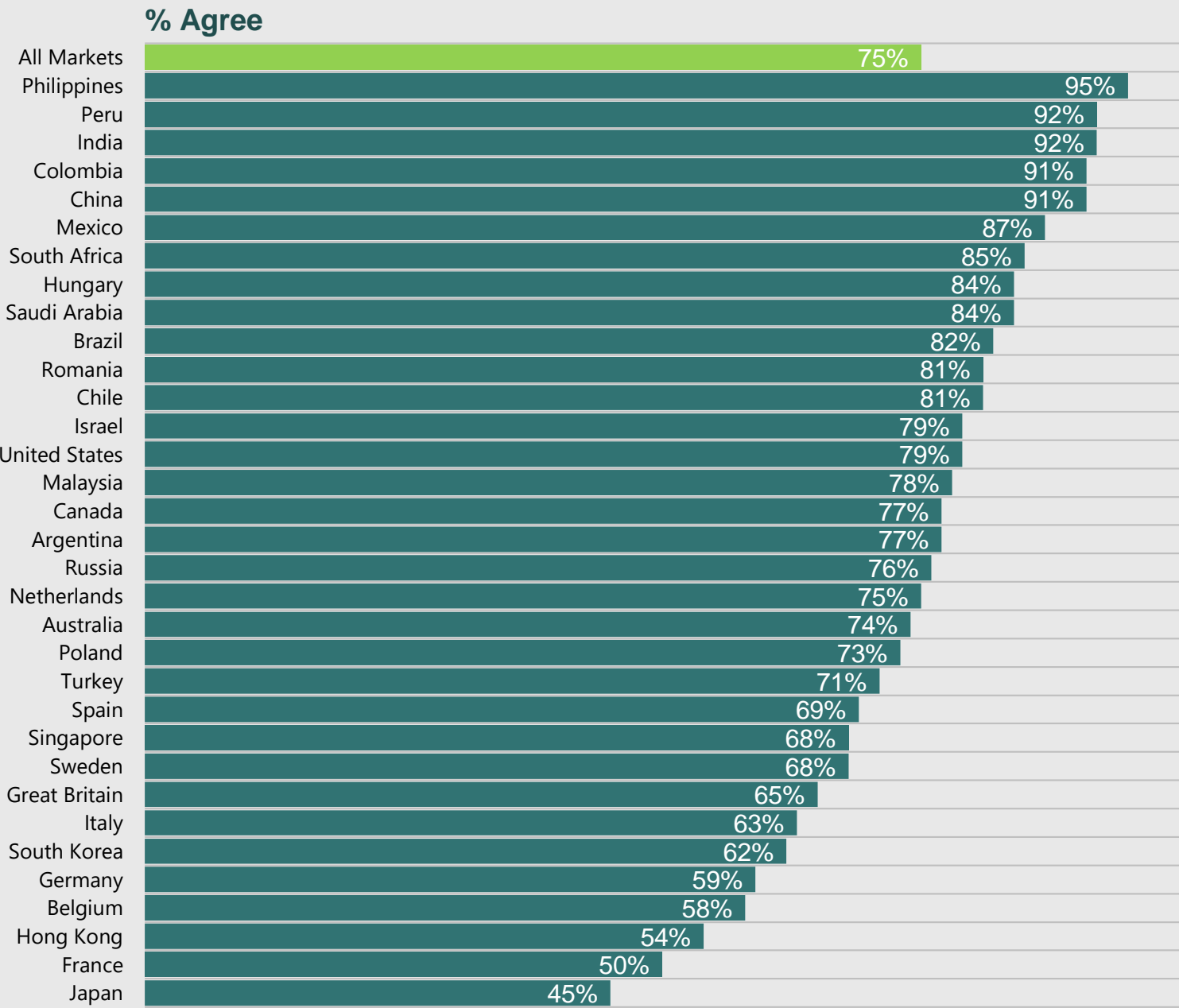
Please indicate if you agree very much, agree somewhat, disagree somewhat or disagree very much with the following statements:

75%

I am optimistic that 2020 will be a better year for me than it was in 2019



**Base:** 22,512 adults aged 16-64 across Argentina, Australia, Belgium, Brazil, Canada, Chile, China, Colombia, France, Germany, Great Britain, Hungary, India, Israel, Italy, Japan, Malaysia, Mexico, Netherlands, Peru, Philippines, Poland, Romania, Russia, Saudi Arabia, Singapore, South Africa, South Korea, Spain, Sweden, Turkey and the United States.











# Disrupted Lives



# 27 Feb

# 21 March

# 2



# CORONAVIRUS BECOMES REAL



## TRACKING THE CORONAVIRUS

RESULTS FROM A MULTI-COUNTRY POLL

February – March 2020

GAME CHANGERS



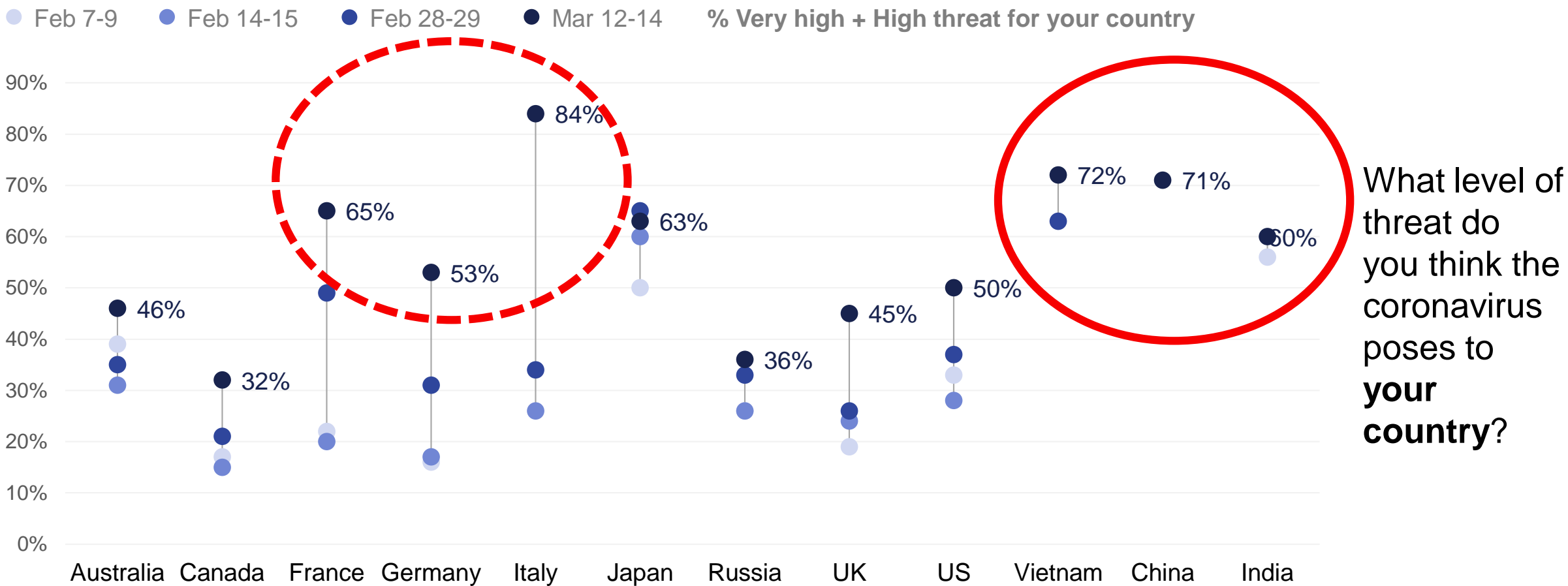
## 12-14 March

12 countries

Results [here](#)



# RISE IN PERCEPTION OF THREAT TO COUNTRY



12-14 March

# WHAT WORRIES THE WORLD

**March 2020**

A 28 country study



GAME CHANGERS

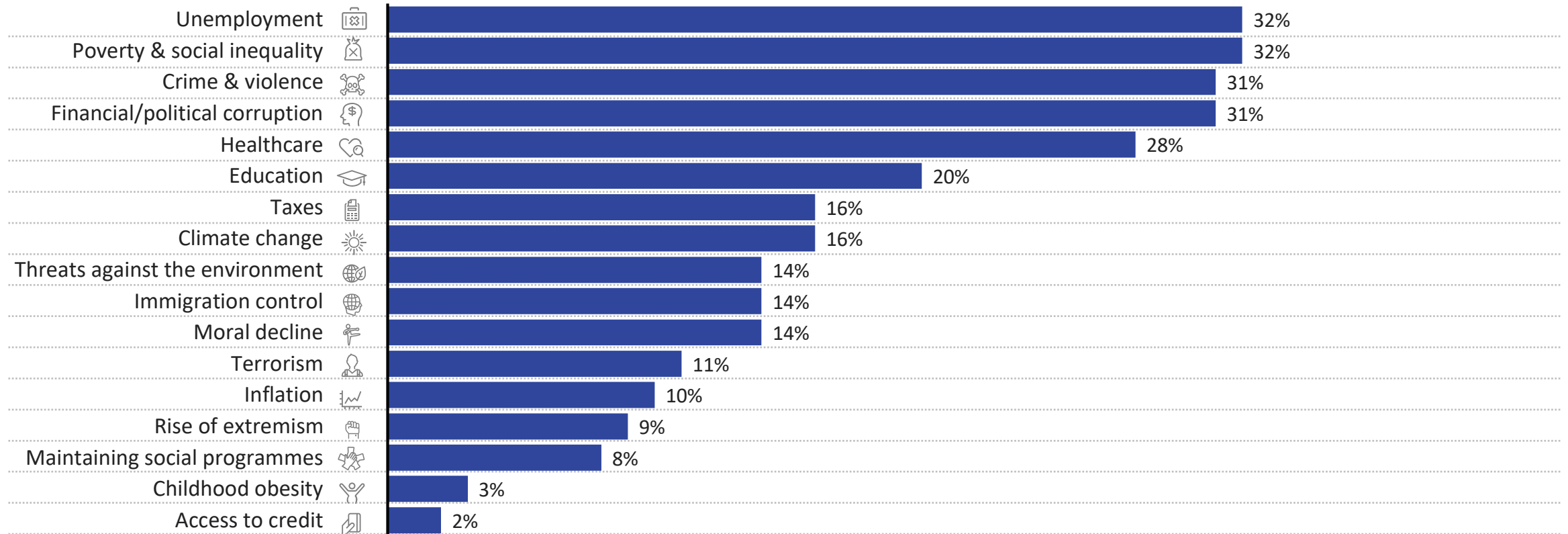




# WORLD WORRIES: March 2020

**Q** Which three of the following topics do you find the most worrying in your country?

Mentioned in March 2020 (%)



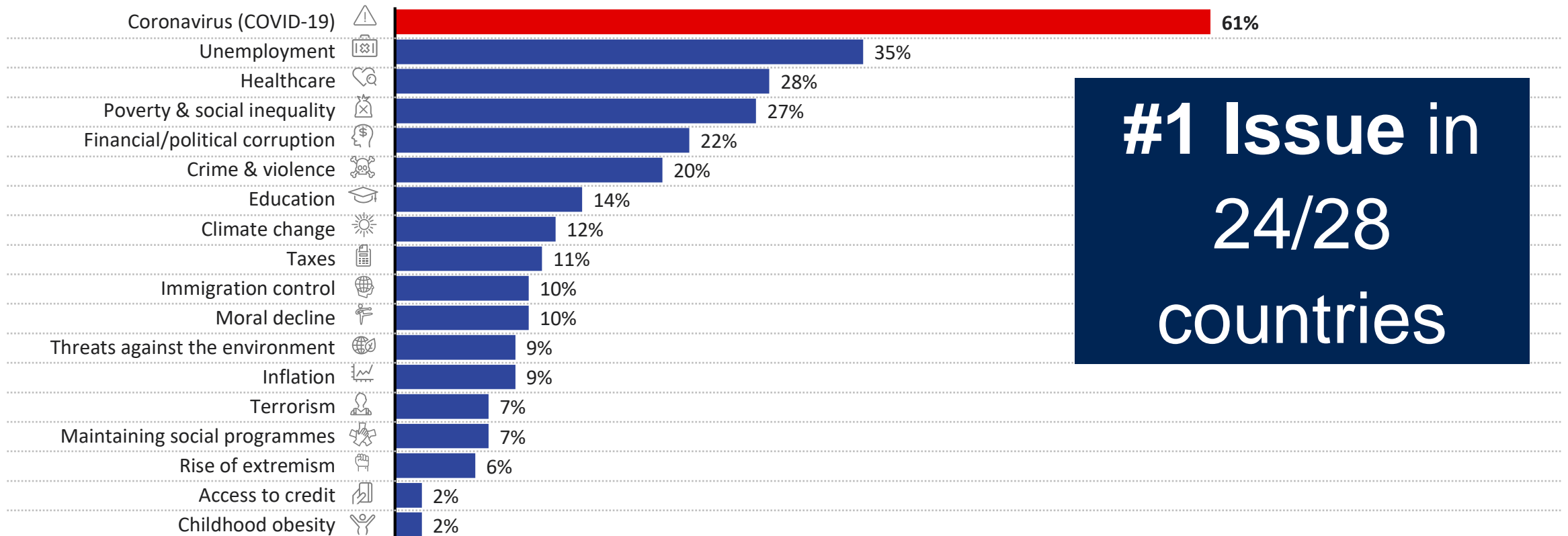
Base: Representative sample of 20,533 adults aged 16-64. March 2020

Source: Global Advisor

# WORLD WORRIES: April 2020

**Q** Which three of the following topics do you find the most worrying in your country?

Mentioned in April 2020 (%)



Base: Representative sample of 19,505 adults aged 16-74. April 2020

Source: Global Advisor



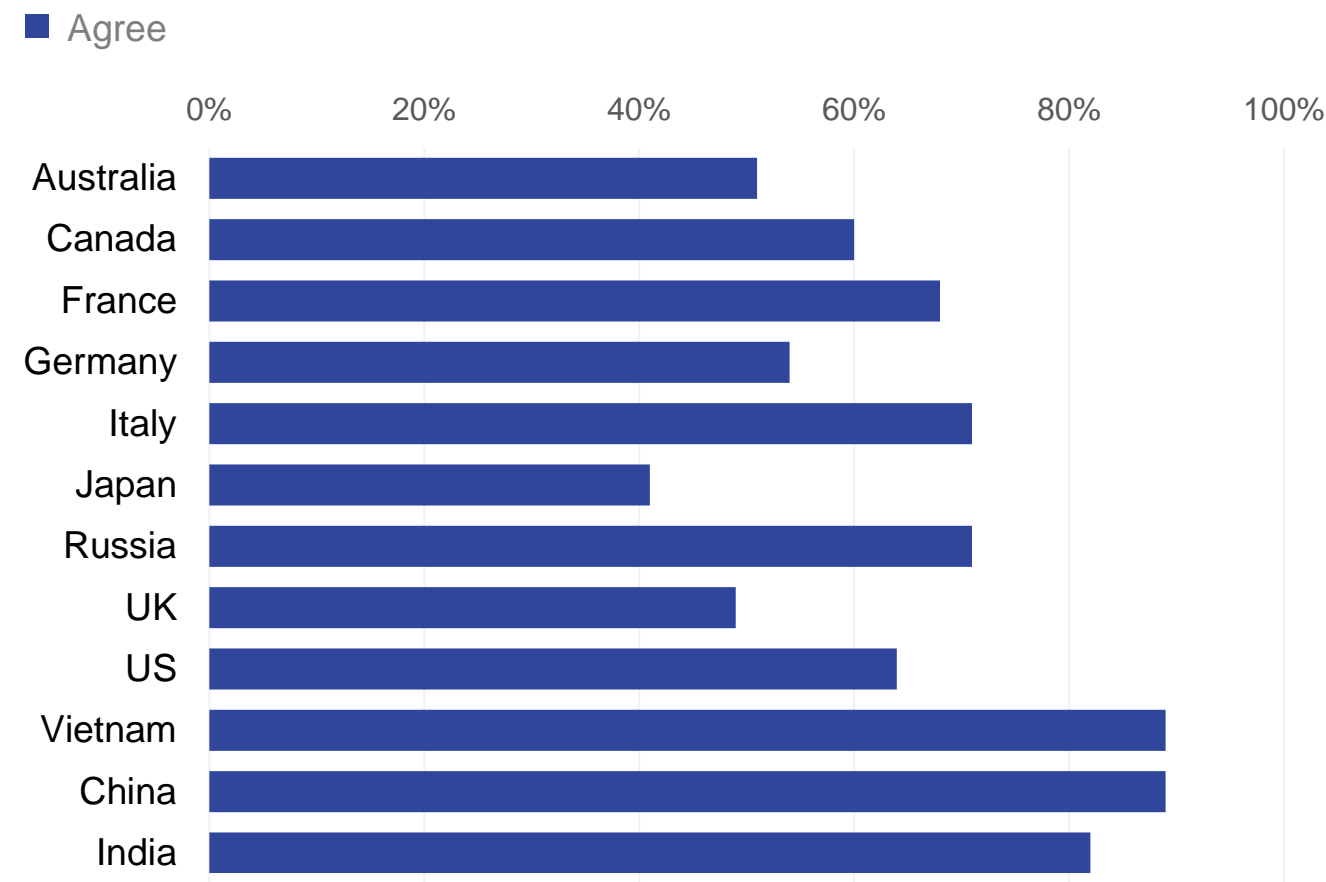
**“I expect  
things to  
return to  
normal  
by June”**



**GAME CHANGERS**

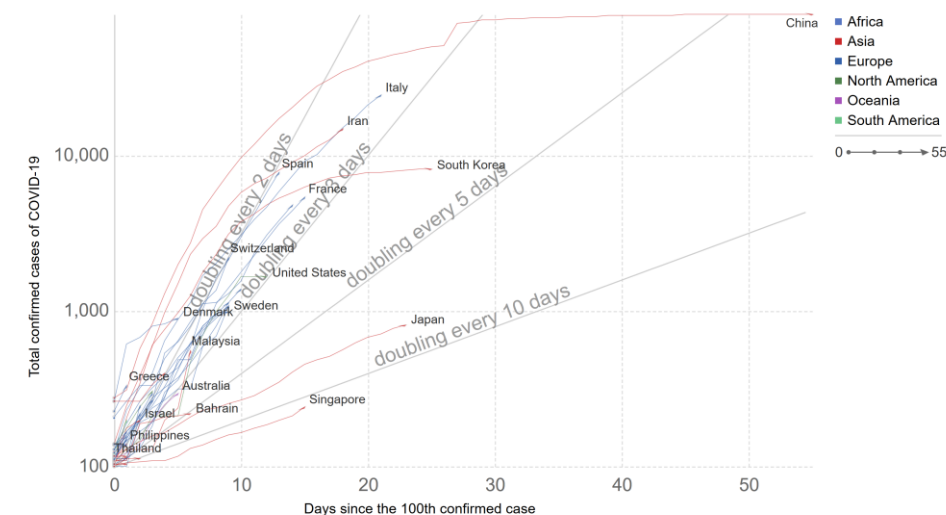


# Majorities in many countries are optimistic that things will return to normal by June, despite trajectories showing the opposite



## 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.



12-14 March

I expect things to return to normal by June



# Fast forward to June

# 3

“I expect  
things to  
return to  
normal  
~~by June~~  
*within 1-2  
years*”



GAME CHANGERS

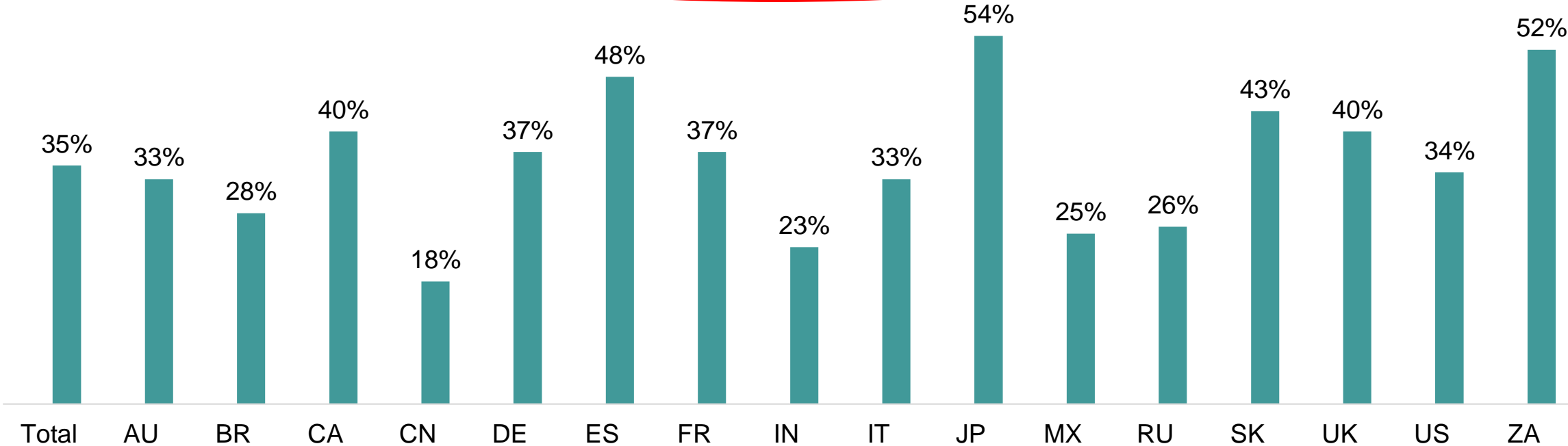




# The view to ‘normal’ continues to retreat into the horizon

How long do you think it will take before things feel like they are getting back to normal?

% saying 1 year or more



Change since May 10 <sup>th</sup>																
6	5	7	4	9	4	8	3	6	-2	12	12	6	18	2	5	16

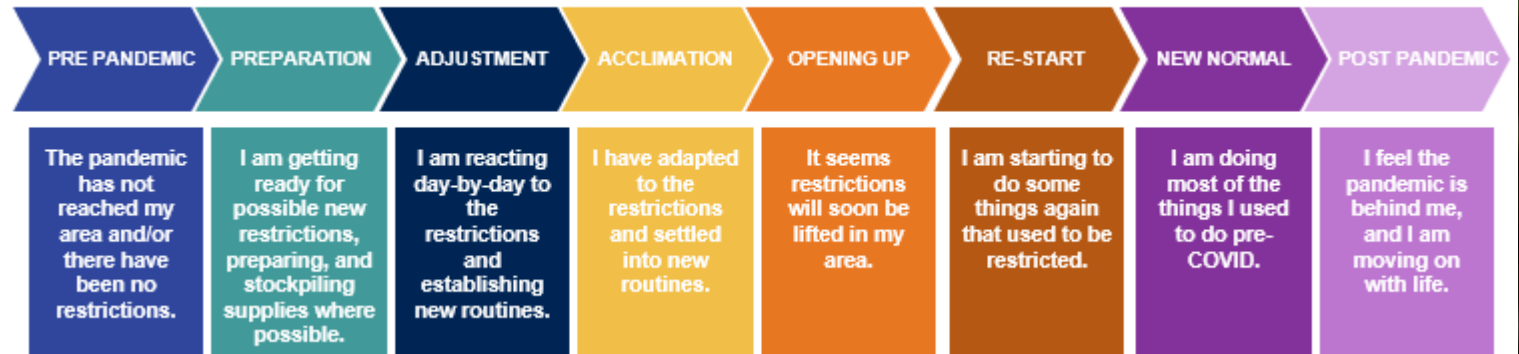
10-14 June



# IPSOS ESSENTIALS SURVEY RESULTS

June

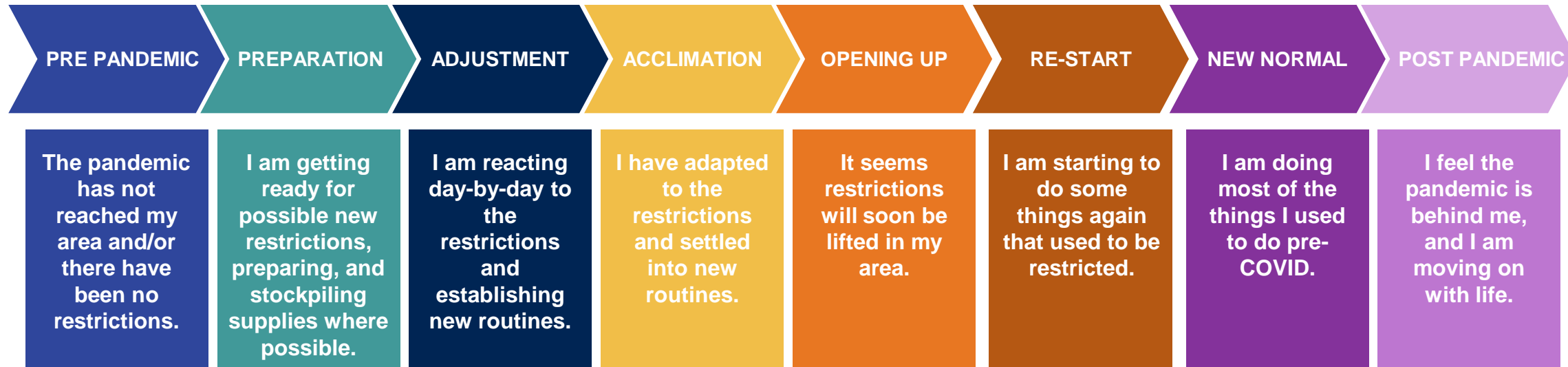
## Phases of the Crisis





# The phases of the crisis: self-assessment

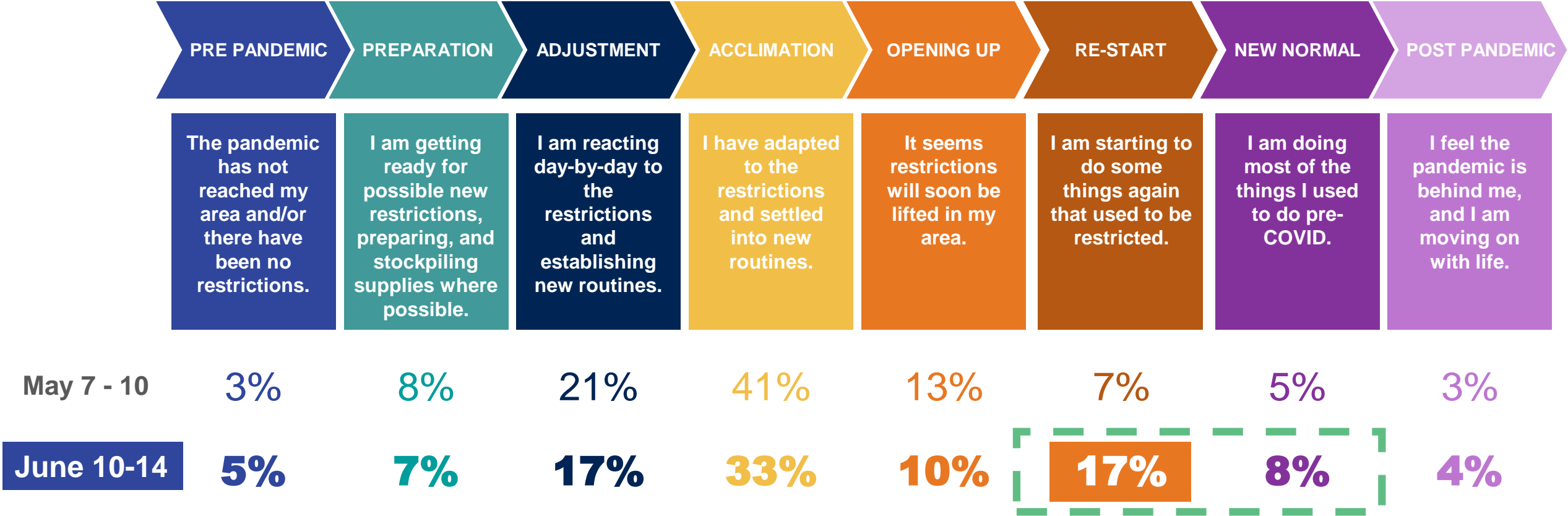
*“There are often several phases or stages that people go through when times are hard. Which one of the following phases do you feel best describes your current situation?”*



10-14 June

# In 4 weeks, those **advancing** to “re-start” has more than doubled

“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?”





# Where are we now?

# 4

# IPSOS ESSENTIALS SURVEY RESULTS

Tracking consumer attitudes and  
behavior in a time of crisis

19-22 November

## Phases of the Crisis

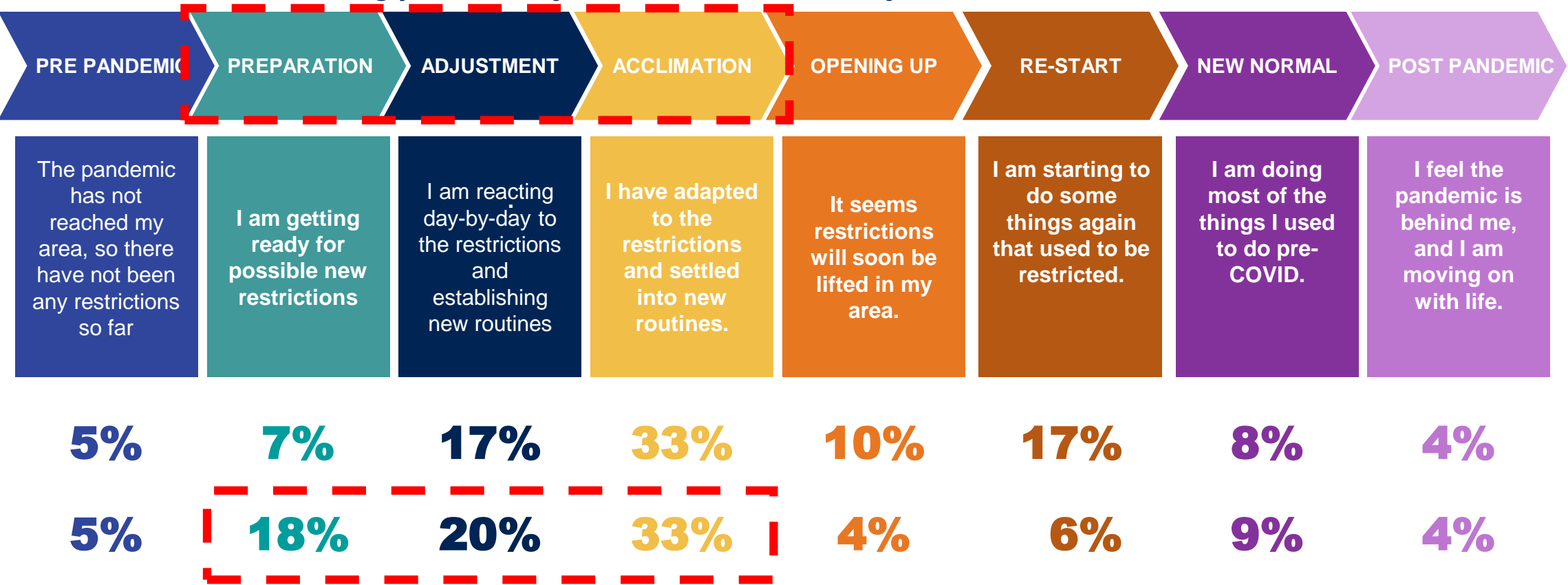




# The Phases of the Crisis:

## Across 15 markets, we are no further on than we were in June...

“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?”



June 10-14

Nov  
19-22

5%

7%

17%

33%

10%

17%

8%

4%

5%

18%

20%

33%

4%

6%

9%

4%

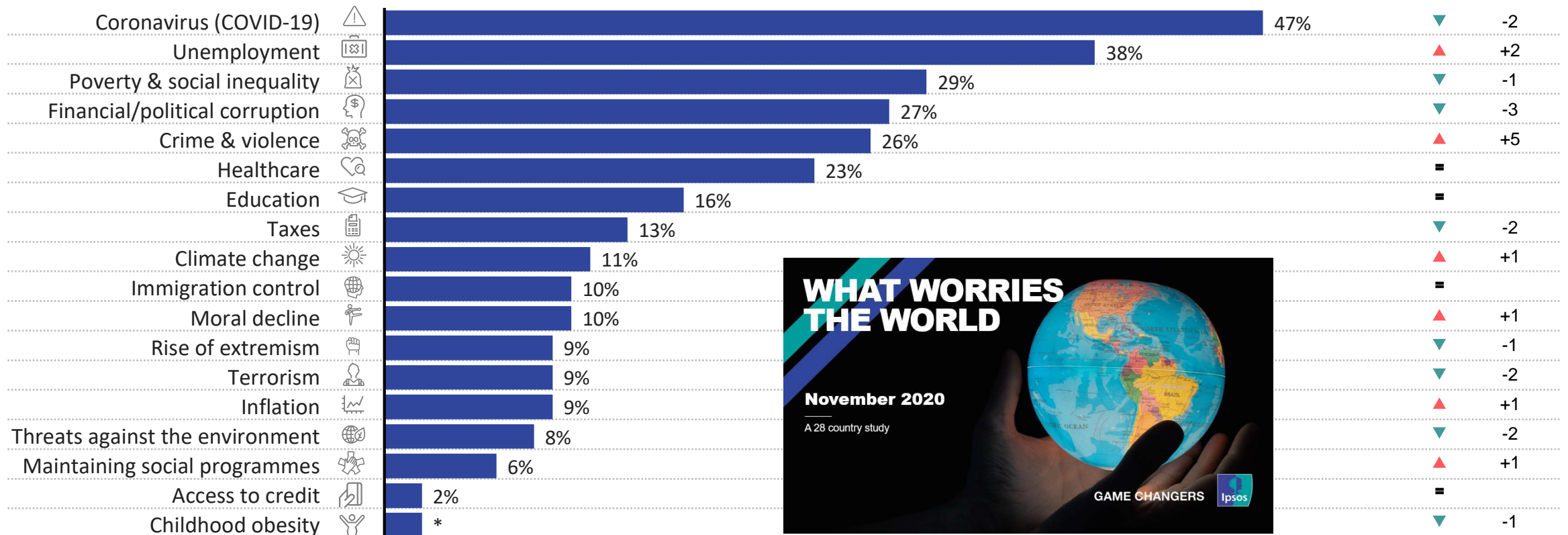
Note: The “Phases” question wording changed slightly at start of July; this chart shows the current wording



# Coronavirus still the #1 worry

**Q** Which three of the following topics do you find the most worrying in your country?

Mentioned in November 2020 (%)



Base: Representative sample of 20,006 adults aged 16-74 in 27 participating countries, October 23rd 2020 - November 6th 2020.

Source: Global Advisor

Latest results [here](#)

# Even among those in a “post pandemic” phase, **anxiety** and **concern** of another wave remain for many citizens

Phases: COVID Anxiety and Perceptions





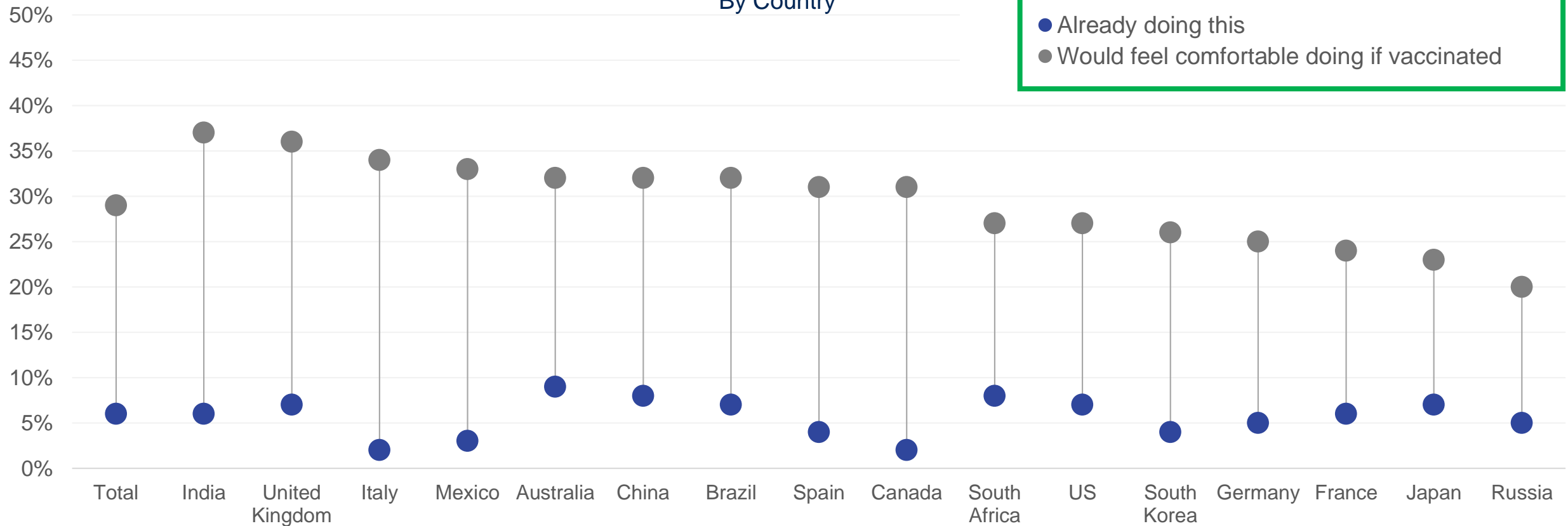
# And Now What?



# Vaccination shows promise to jump start re-engagement with travel activities

## Activities Already Doing vs. Comfortable With Vaccine “Booking a leisure trip travel in 2021”

By Country



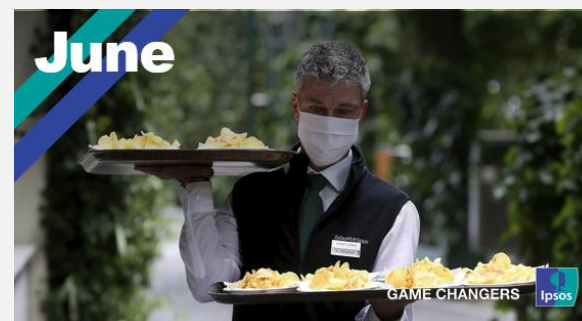
Q: You mentioned that you're not currently doing the following activities. Which of the following would you be comfortable with if you were to get vaccinated for COVID-19? (n=14437)



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## CHANGING CONTEXTS

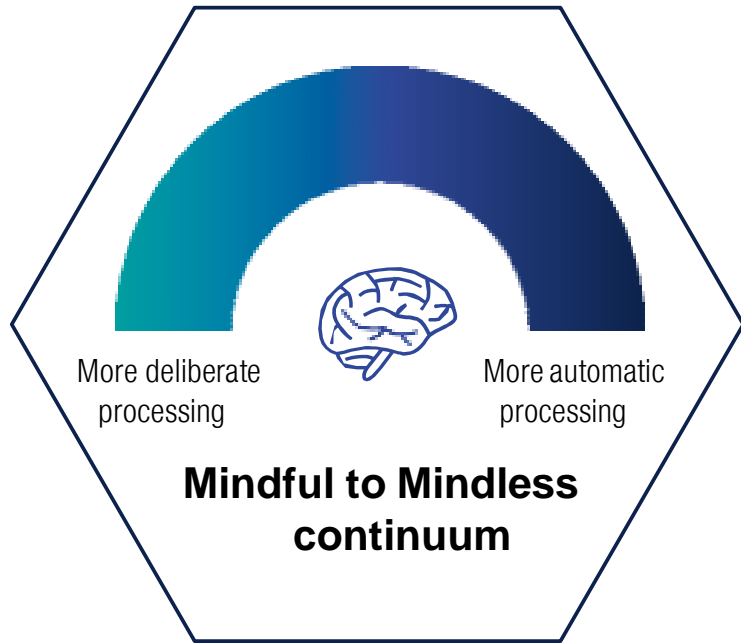
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**Jim Needell** Chief Client Officer, Ipsos in the UK

**Claudia Meillat** Global Head of Analytics, Brand Health Tracking, Ipsos



# Context is critical.



We socialise differently.  
We work together differently.  
We prioritize differently.  
We buy differently.  
We consume differently.  
  
We ***decide*** differently...



# More mindful, but not necessarily “right”.



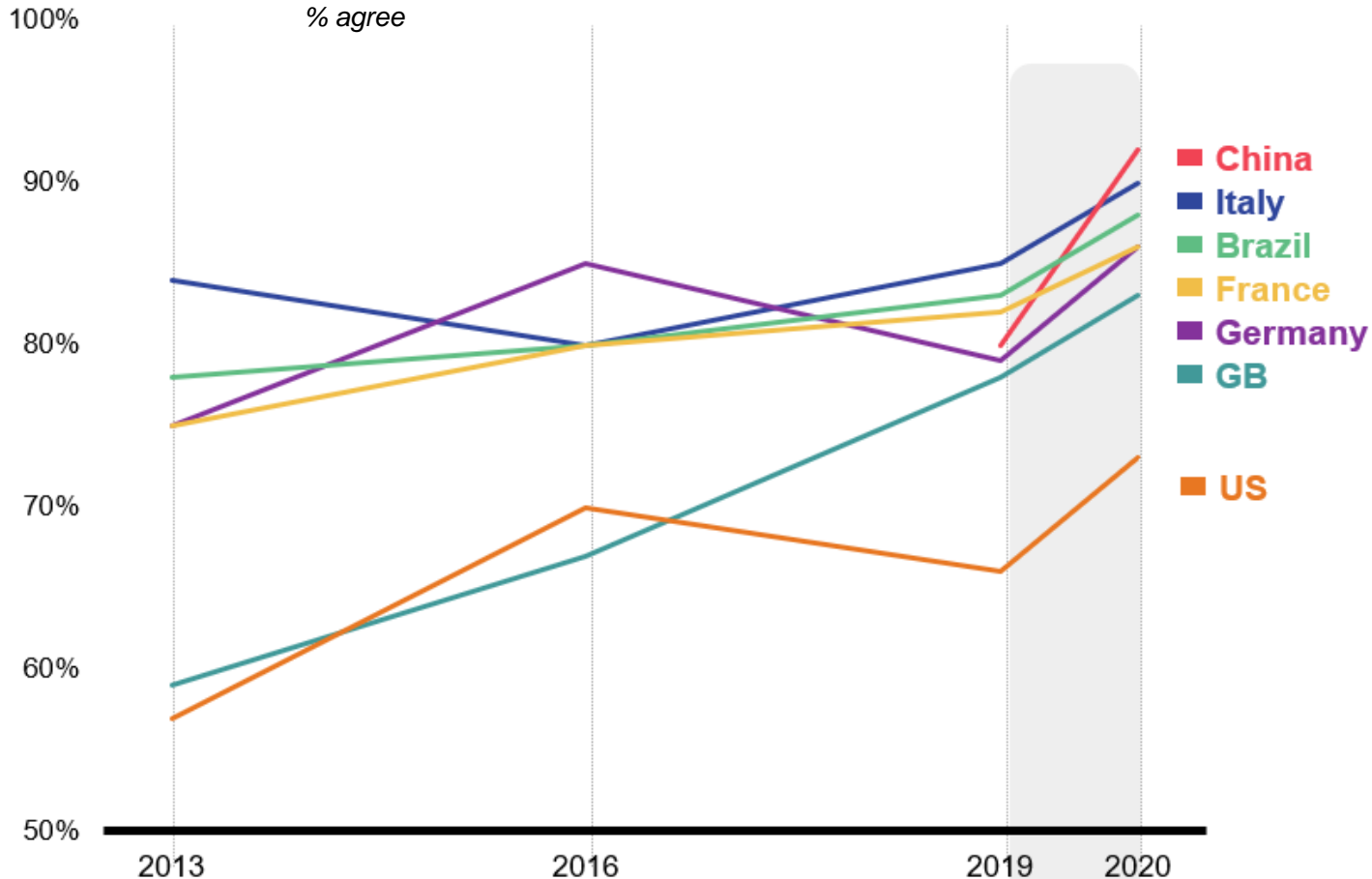
*“We could know, and should know, but don’t know because it makes us feel better not to know”*

Margaret Heffernan

# An ongoing pandemic tension.

*"We are heading for environmental disaster unless we change our habits quickly"*

% agree



Ipsos Global Trends Series  
Base: c.1,000 adults aged 16-75 (18-75 in US) in each market for each wave

*"I stopped cleaning everything with wipes, it kills the planet. I want to use more and more natural products."*

*Ipsos Longitudinal Ethnography Panelist*

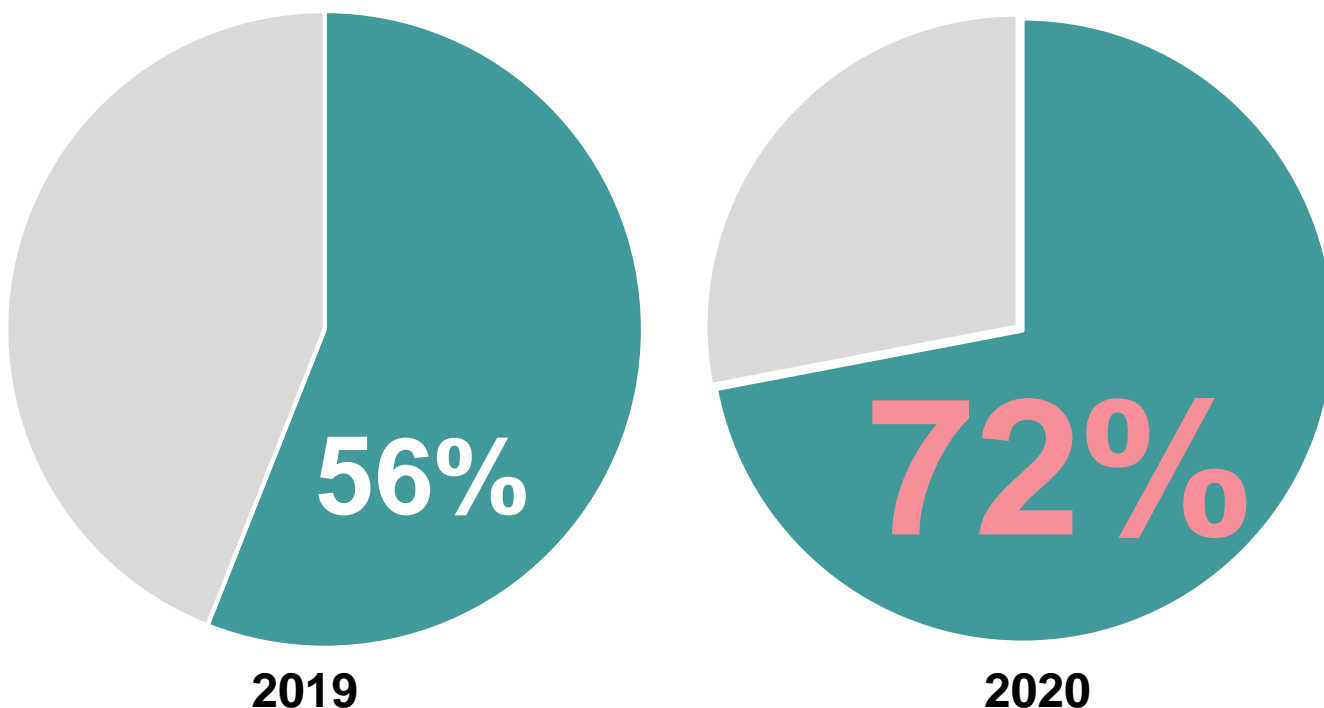
*"It's a psychological thing for me. I am really worried and I just want to use the corporate, industrial awful stuff – and I know it's terrible for the environment, I know it."*

*Ipsos Longitudinal Ethnography Panelist*

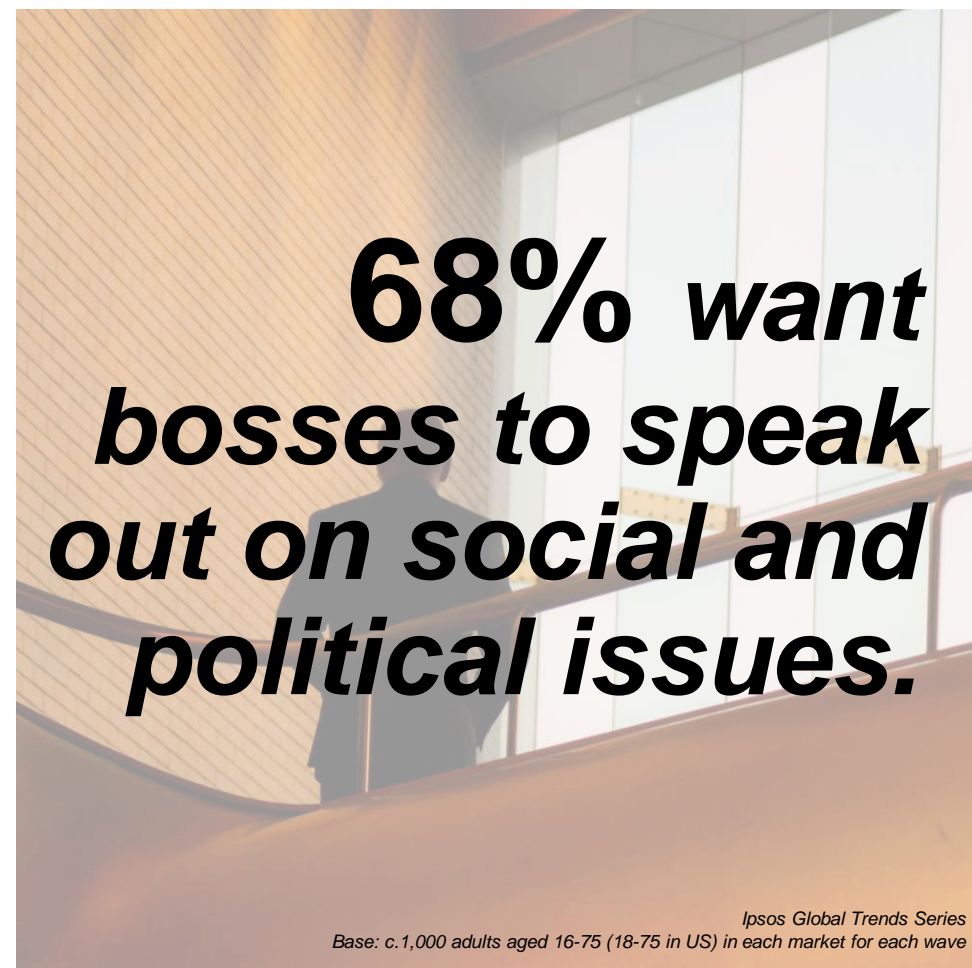
# An increasingly important role for brands.

*“I tend to buy brands that reflect my personal values”*

% agree, GB

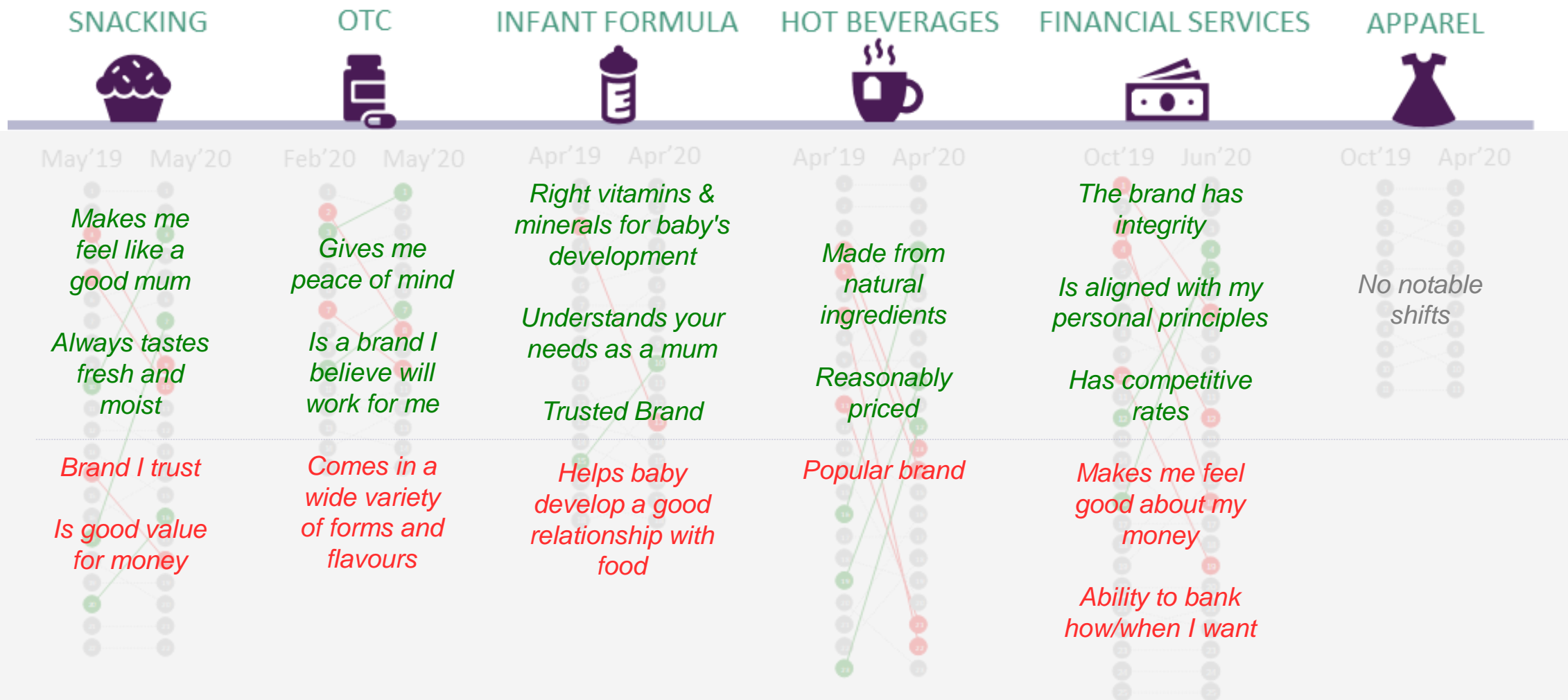


Base 2019: Ipsos Global Trends – 1,001 British adults aged 16-75 interviewed June - July 2019  
Base 2020: Ipsos.Digital polling – 1,000 British adults aged 16-75 interviewed 1-2 October 2020

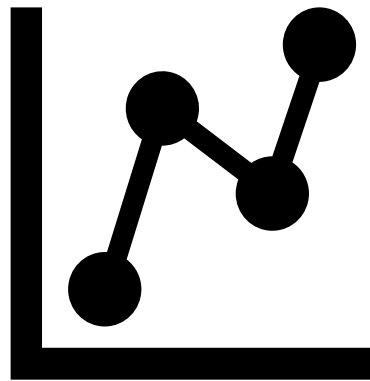
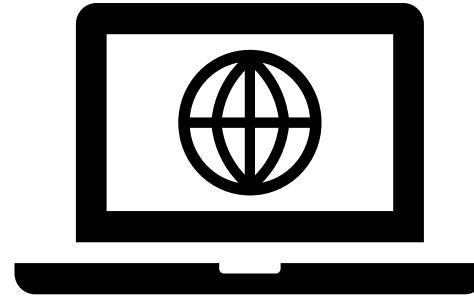
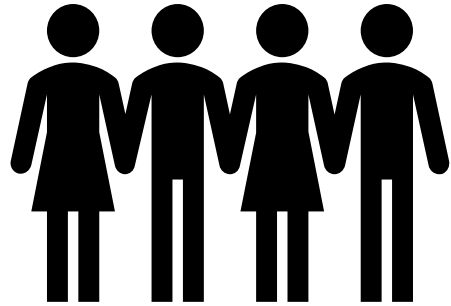




# Shifting consumer priorities.



# So, are we still making decisions based on pre-COVID data?



**Foundational insights drive foundational decisions.**

**Context has shifted.  
Priorities are shifting.**

**Is it the right time to revisit your data?**



**[Download](#) the white paper**



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## SPOTLIGHT ON CHINA

---

**Kelly Yin**

Service Line Leader, Qualitative, Ipsos in China



# HOW DID PEOPLE FEEL?

## THE 2020 JOURNEY



### DENIAL

DEC 31,  
2019

OUTBREAK OF  
COVID-19

Buzz: 128,767,594



### ANGER

JAN,  
2020

KOBE BRYANT  
TRAGEDY

Buzz: 336,414



### BARGAINING

AUG,  
2020

TRADE WAR  
U.S AND CHINA

Buzz: 230,536



### DEPRESSION

NOV,  
2020

THE AMERICAN  
ELECTION

Buzz: 61,948



### ACCEPTANCE

DEC,  
2020

MARADONA  
PASS-AWAY

Buzz: 71,604



# HOW DO PEOPLE FEEL?

## TODAY

**RESTORE**



**CONFIDENCE**



**SECURITY**



**ACTIVENESS**

**CCI: TODAY CHINA'S CCI IS HIGHER THAN IN JANUARY 2020**

Since July, equal or higher than January (72.9).

**GDP: IN Q3 BACK TO GROWTH**

In Q3, \$10 trillion (+ 3.58% vs 2019).

**SERIOUS ATTITUDE TOWARD COVID-19 MAKES CITIZENS FEEL SAFE**

Ongoing extensive testing and tracing.

**EXCELLENT RESULTS FOR DOUBLE 11**

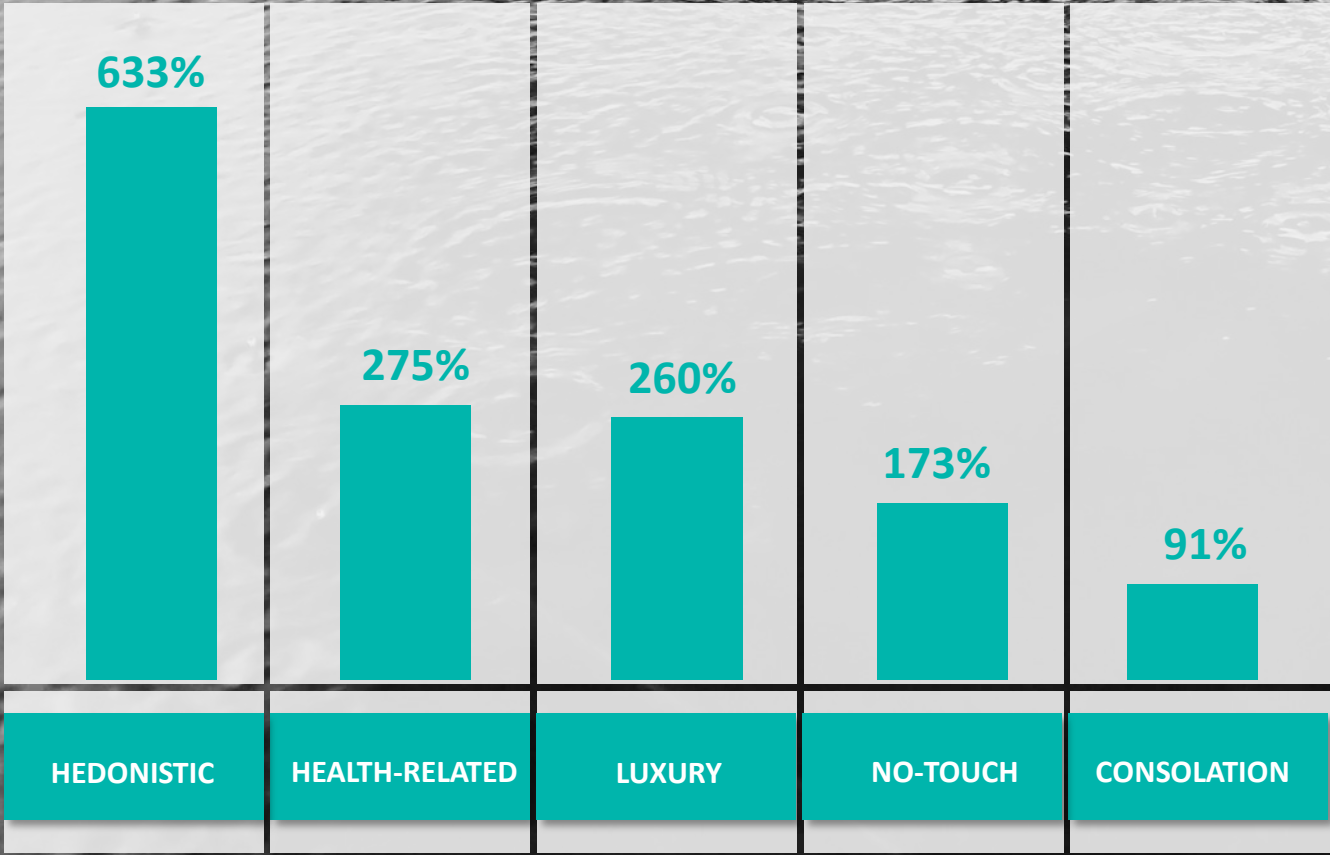
Tmall set new sales record: RMB 498.2 Billion, with 26% YoY growth.



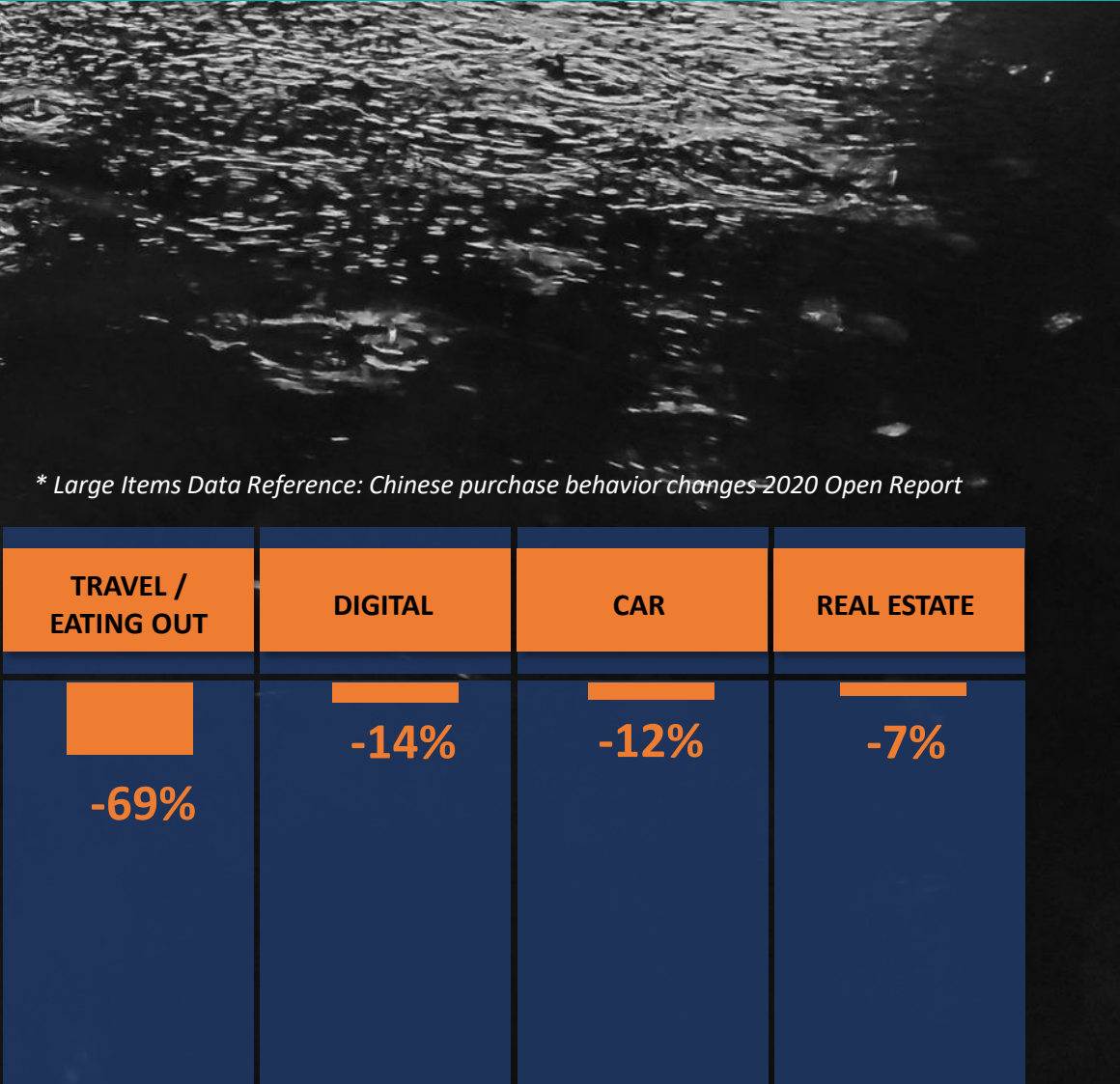
# HOW HAS SPENDING CHANGED?



PATTERNS are different, the overall AMOUNT is stable



\* Small Items Data Reference: Double 11 Tmall Open Report



# HOW IS BUSINESS RESPONDING?

## ACCELERATING on the same TRAJECTORY



### NEW CHANNEL DYNAMICS



Austin Li  
\$ 550  
Million sales  
on Nov 11<sup>th</sup>

### ONLINE- OFFLINE FLUIDITY



1-hour  
deliver no  
matter  
on/off line

### HIGHLY PERSONALIZED



NESQINO  
BY NESTLE,  
total app  
design  
solution

### POTENTIAL OF LOW TIER MARKETS



Biggest  
Bubble Tea  
Chain MI  
XUE BIN  
CHENG in  
China  
focuses on  
low tier



# WHAT ABOUT NEXT YEAR?

Settling in the NEW REALITY, hoping for a SOCIAL RECOVERY

## 2021 WISH

**05  
Vaccine**

Buzz: 1,220,333

**01  
Travel**



Buzz: 128,767,594

**02  
Online life**



Buzz: 1,582,846

**04  
Entertainment**



Buzz: 3,220,333

**03  
Home Office**



Buzz: 391,757



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## COVID-19 VACCINES: Opportunities and Obstacles

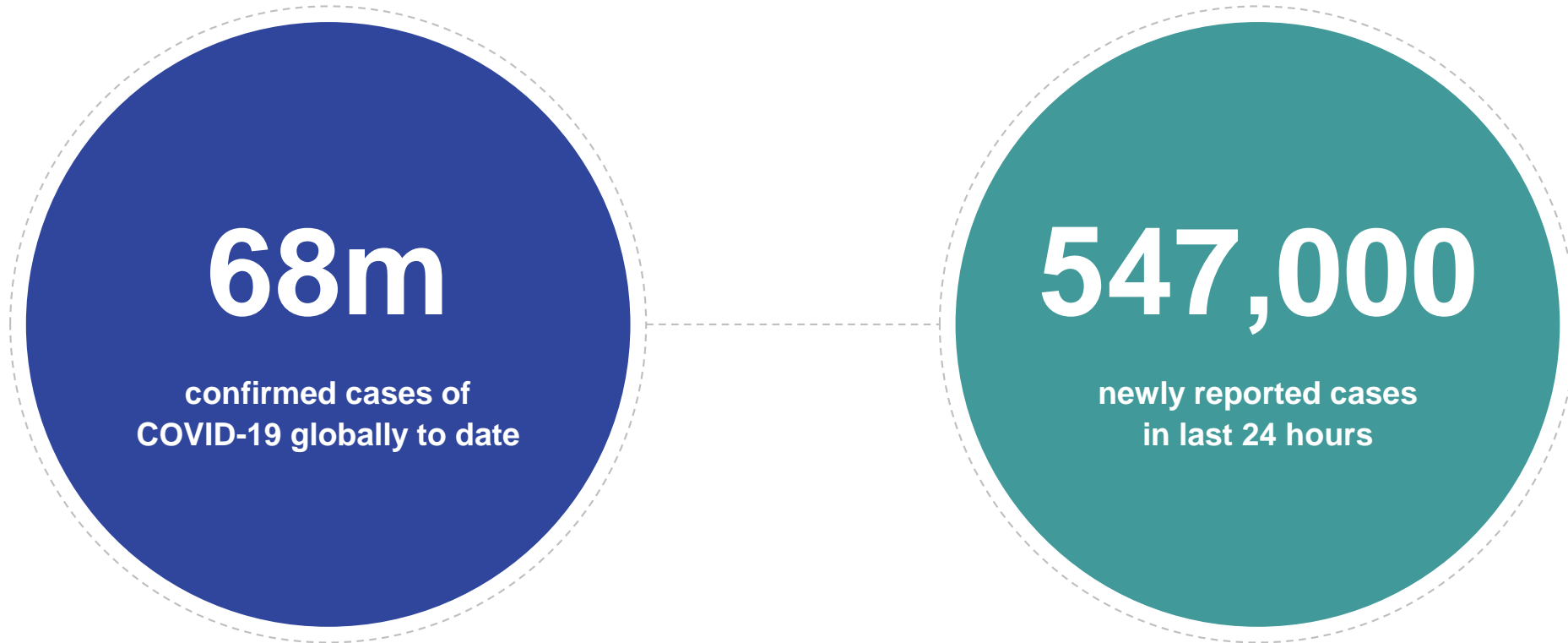
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**Jackie Ilacqua**

President, Syndicated Services, Healthcare

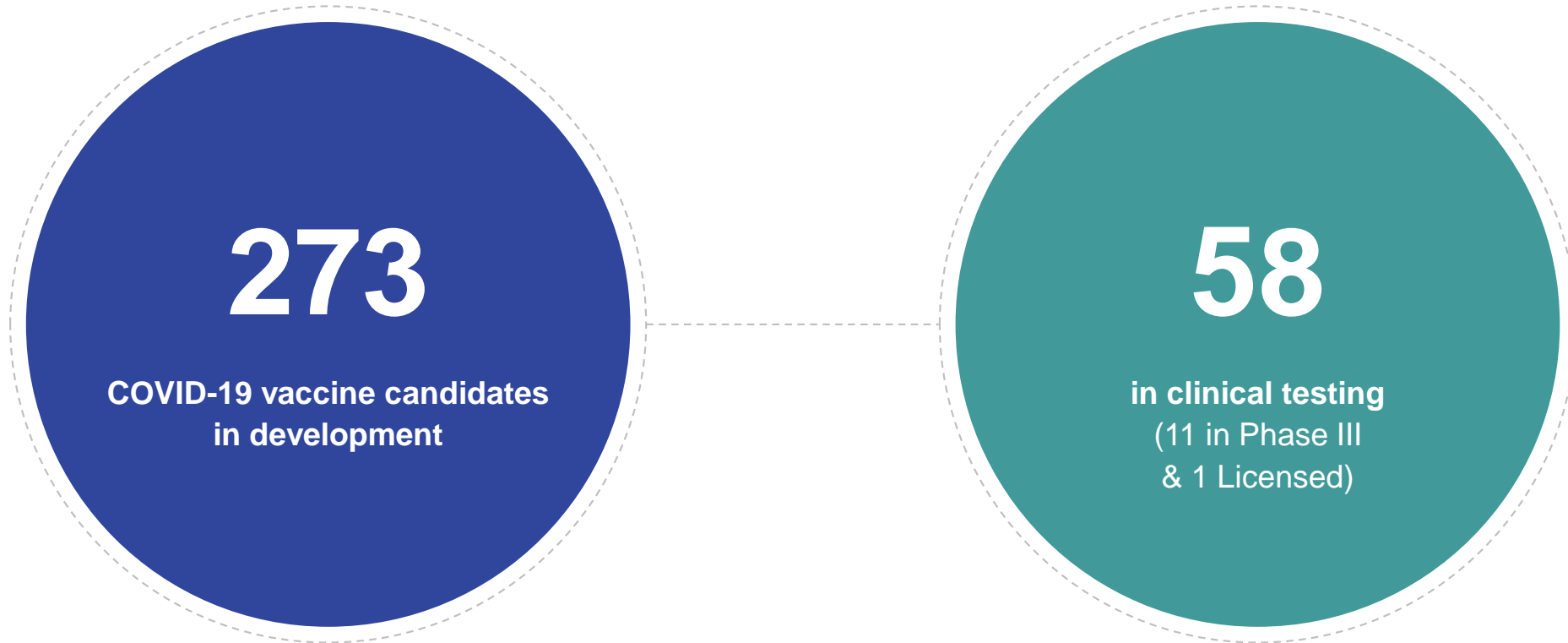


# COVID-19 has affected all countries, all industries and all walks of life



Source: World Healthcare Organization Coronavirus Disease Dashboard – updated 9 December 2020 (<https://covid19.who.int/table>)

# All hopes are pinned on a vaccine – the most anticipated vaccine in modern history

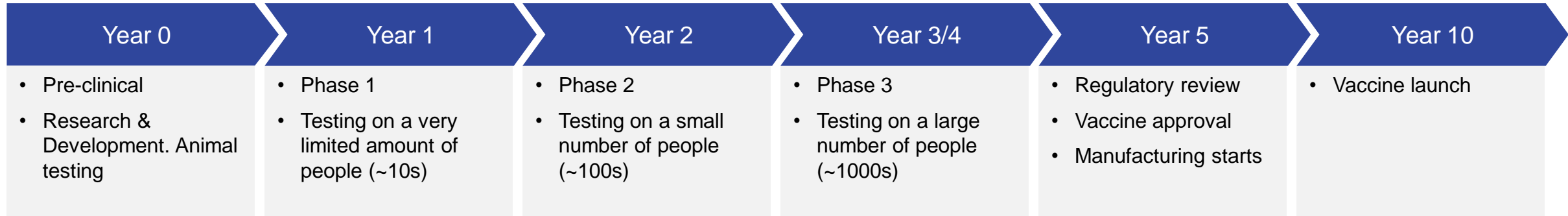


Source: London School of Hygiene & Tropical Medicine COVID-19 Vaccine Tracker – accessed 9<sup>th</sup> December ([https://vac-lshtm.shinyapps.io/ncov\\_vaccine\\_landscape/](https://vac-lshtm.shinyapps.io/ncov_vaccine_landscape/))



# But the COVID-19 vaccine development process is far from typical

## Typical vaccine development



## COVID-19 vaccine development

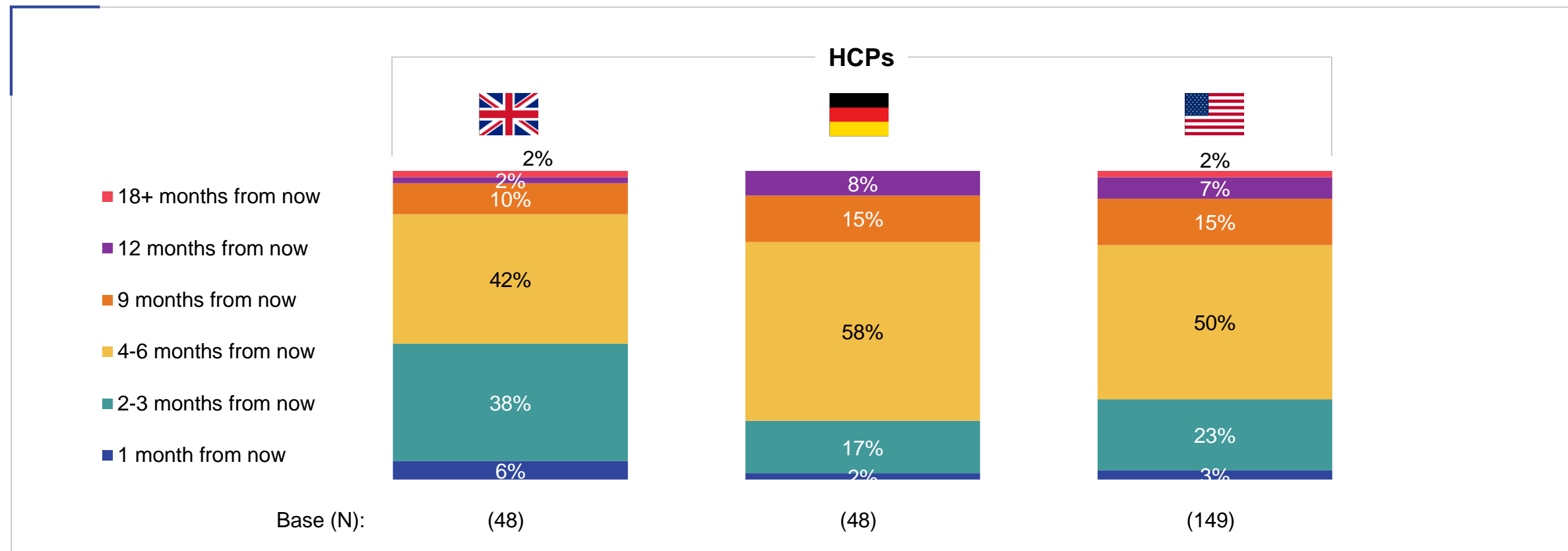


Manufacturing starts “at risk”

Source: Ipsos Vaccine Centre of Expertise

# When do doctors expect a vaccine to be available?

Opinions vary; HCPs in Germany expect a longer wait than those in UK & US

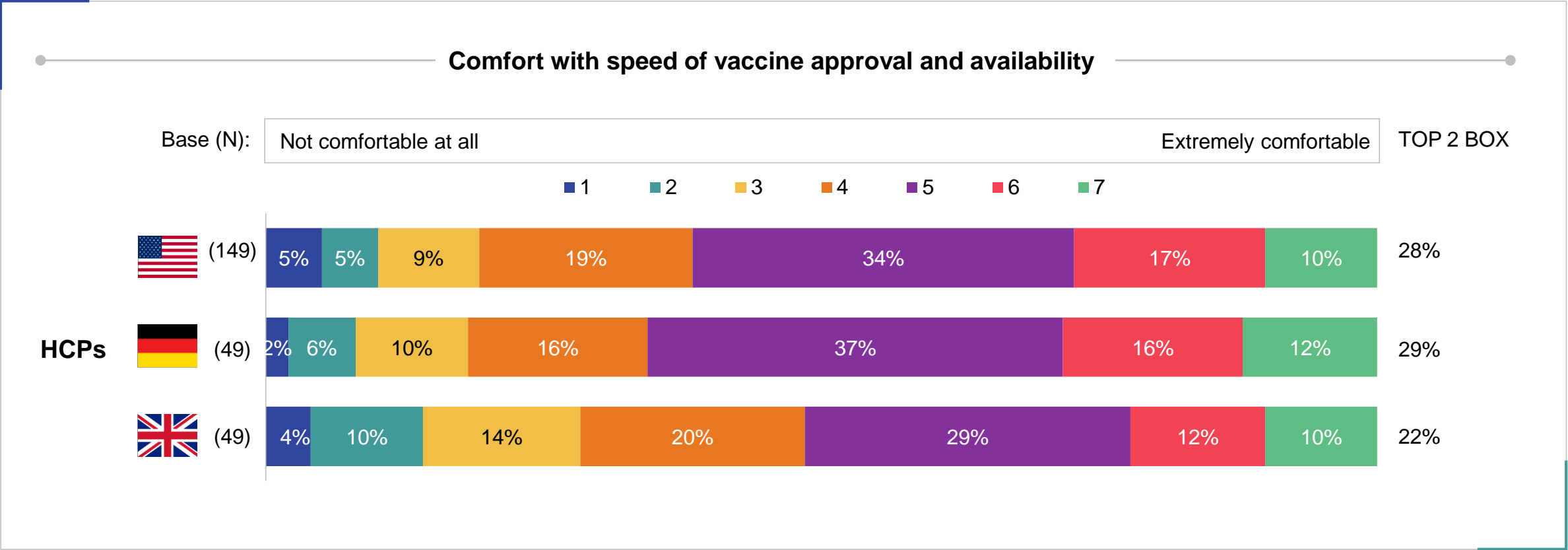


BASE: All respondents; 'don't know' responses excluded.

Source: Ipsos Syndicated Vaccine Assessment Study – Nov 2020. Data collected online from HCPs in EU5, US, Japan, Q: How soon do you think the first vaccine for COVID-19 will be available on the market for general use?

# How do doctors feel about this accelerated development?

Overall, the majority of doctors surveyed were cautiously positive



BASE: All respondents; don't know' responses excluded.  
Source: Ipsos Syndicated Vaccine Assessment Study – Nov 2020. Data collected online from HCPs in EU5, US, Japan, Q: How comfortable are you with how quickly vaccines will be approved and available?





# However, clinical outcomes and approvals are not the only barriers to vaccinating the world



## SUPPLY

Vaccinating the world will require billions of doses



## DELIVERY

Pfizer/BionTech vaccine must be stored at minus 70-80°



## ADMINISTRATION

Vaccination centres must be sizeable & conveniently located



## COMPLIANCE

2-shot vaccines in particular demand public compliance

### Issues with uptake

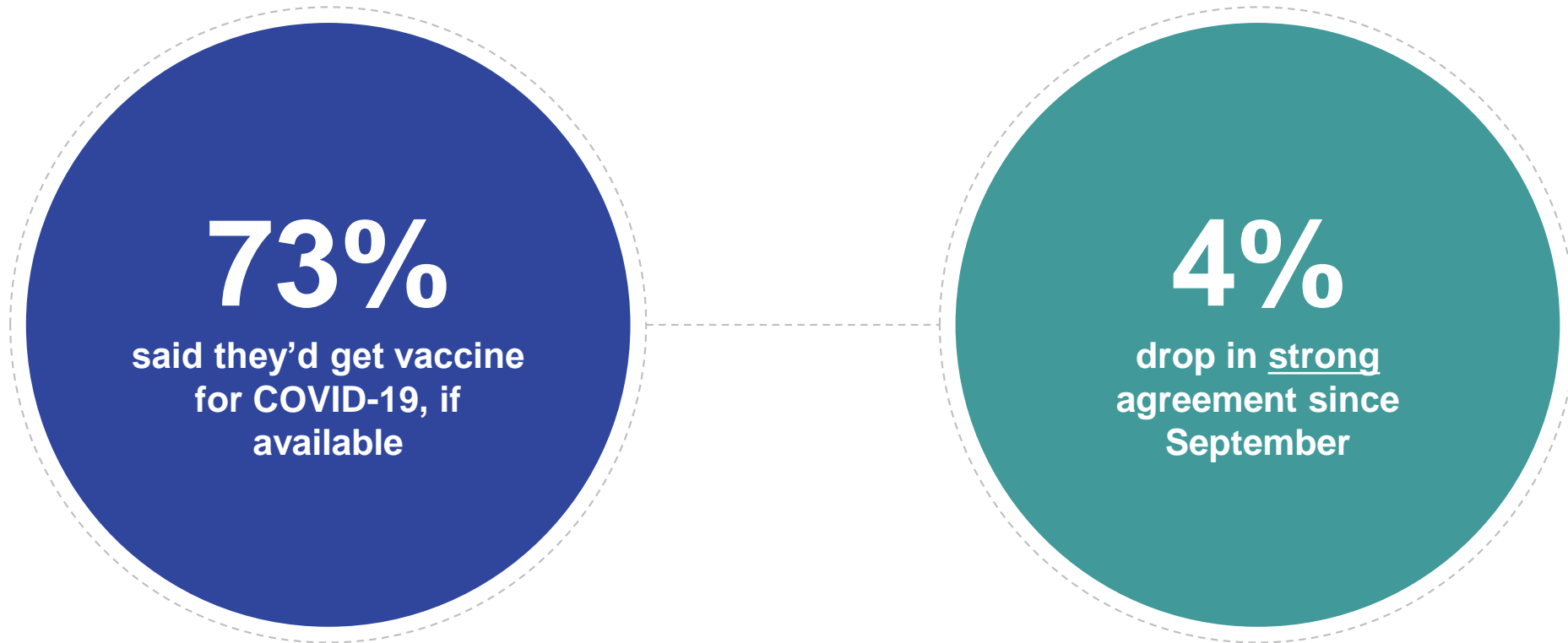
*“The main issues I see are supply from the manufacturer and storage. Mass local centres will need to be well organised with booked appointments and checks to ensure both doses given.”*

### Issues with administration?

*“Storage of Pfizer vaccine at -70deg, enough staff available at busy time entering winter period, access for ambulant patients, safe visiting to house bound & nursing home patients.”*

*General Practitioners, UK (Ipsos panel member)*

# Will people even take the vaccine once available?



Source: Ipsos Essentials, Base: 18,526 online adults aged 16-74 across 15 countries, Nov 2020

# Anti-vaccination groups & 'vaccine hesitants' may be difficult to convert given accelerated development

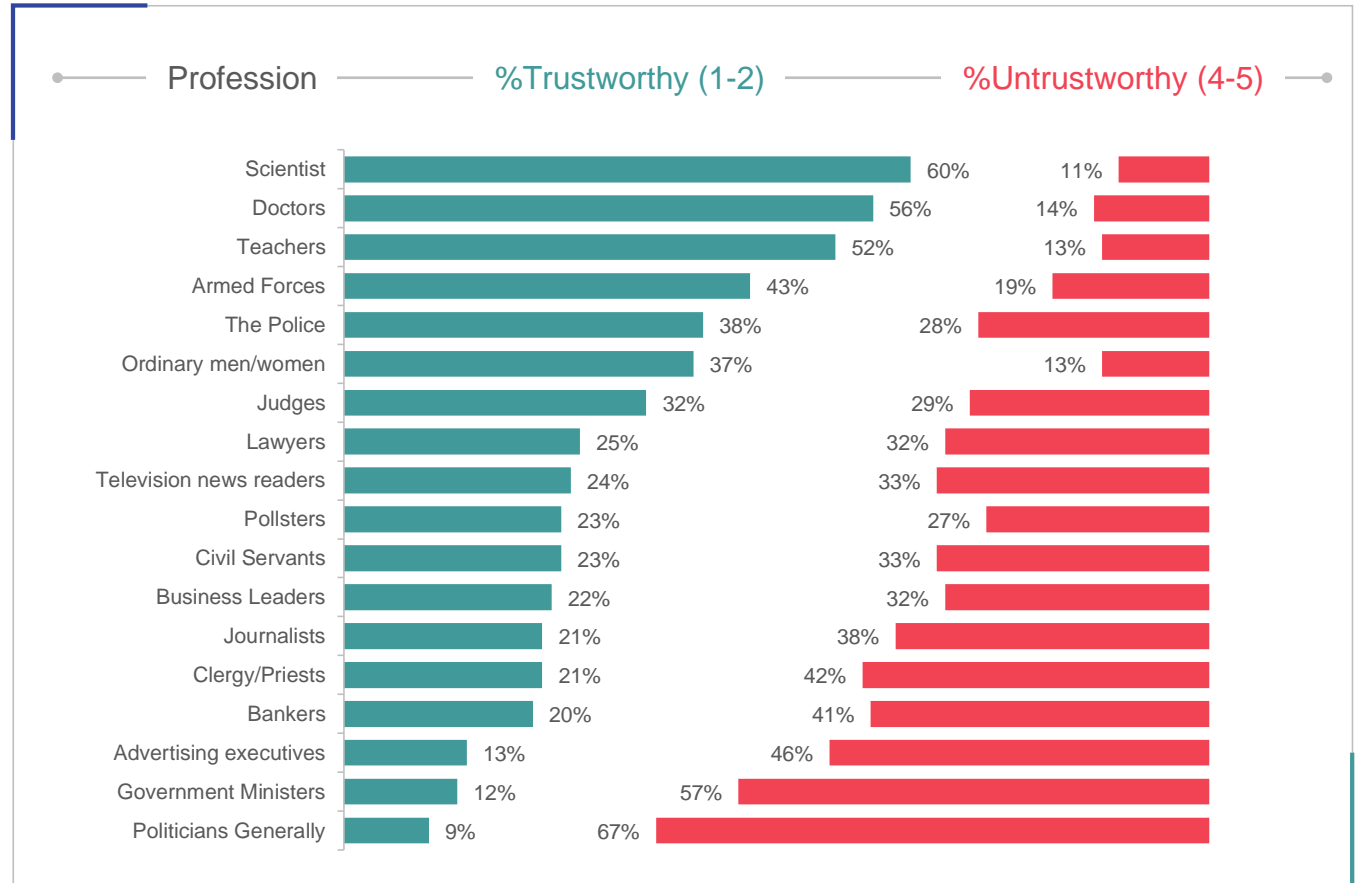




# Trust in the key players may also affect uptake

## Ipsos Global Trustworthiness Index

Q: In general, do you think each is trustworthy / untrustworthy? (scale of 1-5)



Source: Ipsos Global Trustworthiness Index (19,587 online adults aged 16-74 across 23 countries, September 2019)

# Many unanswered questions remain



How soon will we know if the vaccinations are indeed working to limit the spread?



Will they prevent transmission as well as infection?



At what point will economies start re-opening, and 'normality' return?



Will people require 'vaccine passports'?



How do we monitor and react in the event of adverse effects to a vaccine?

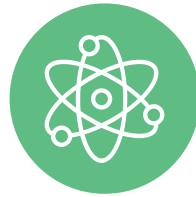


And many more...

# But we have every reason to be positive



**Recent news from Phase III vaccine trials suggests up to 95% efficacy**



**New treatments are in use and in development and already reducing the death rate**



**We learn more about the virus and how to conquer it every day**



# Read our paper to learn more



## **GREAT EXPECTATIONS: Developments & Dynamics of a COVID-19 Vaccine**

[www.ipsos.com/en/great-expectations-covid-19-vaccine](http://www.ipsos.com/en/great-expectations-covid-19-vaccine)

