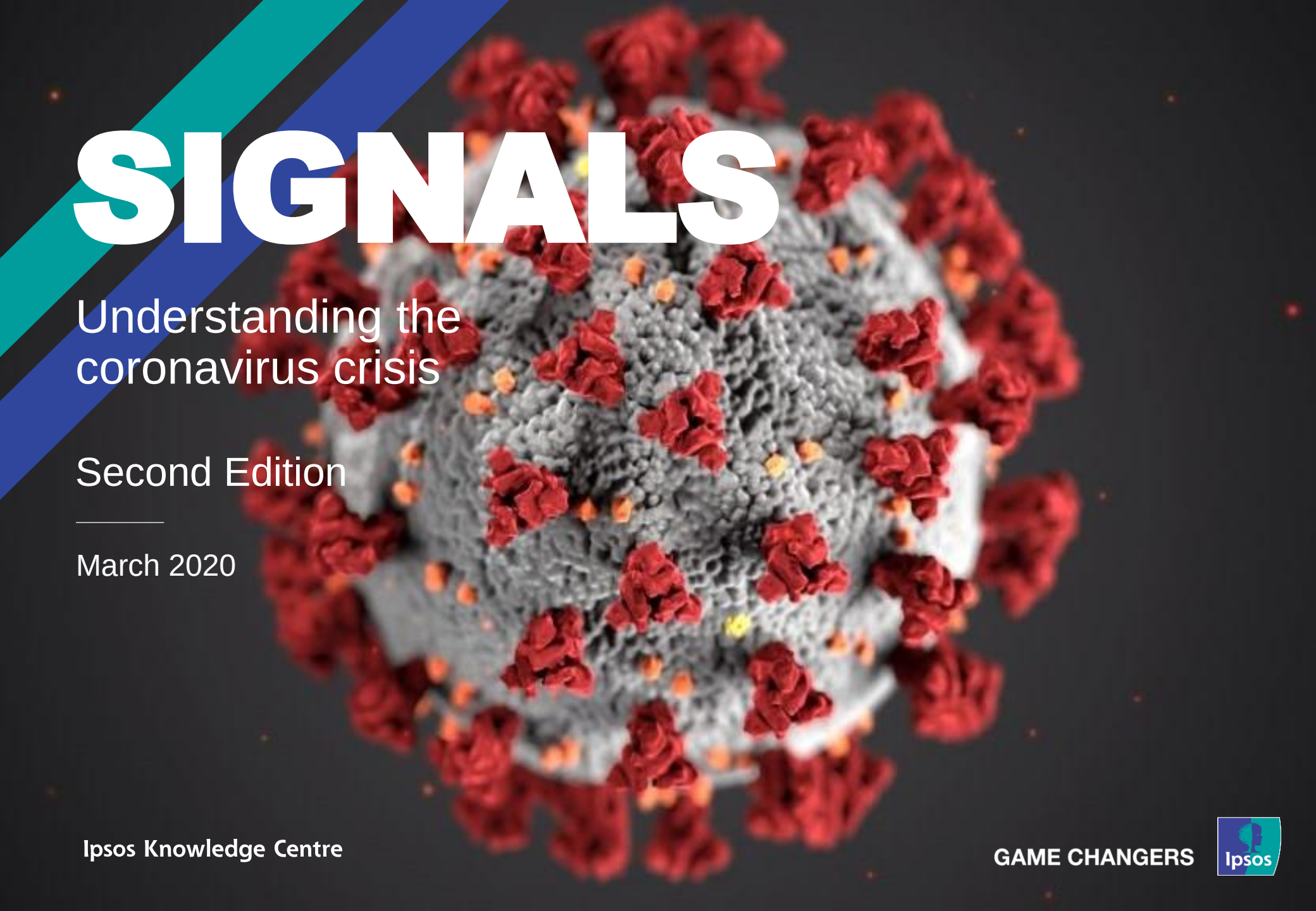


SIGNALS



Understanding the
coronavirus crisis

Second Edition

March 2020

INTRODUCTION – SIGNALS EDITION #2

The defining event of 2020 is the spread of the coronavirus (COVID-19) across the world. Within three months we have moved from the first cases being reported, to the World Health Organization labelling the outbreak as a pandemic, to governments around the world placing their countries in lockdown.

The crisis sees governments, companies and individuals all having to respond to an unprecedented set of challenges, as they grapple with the implications of this “once in a century” event.

There are so many topics to watch and monitor over the coming weeks and months. Governments are under pressure to lead and inform. Businesses – large and small – have to make the right decisions for their employees and their customers. Meanwhile, people’s behaviours will be changing, in ways which may have longer-term implications beyond the immediate circumstances of the crisis.

Ipsos is committed to helping our clients navigate with confidence our world of rapid change, and this digest has been prepared to help us all better understand the dynamics of the current outbreak.

This second edition sees us bring together our latest research on coronavirus and draws on our surveys, social media monitoring and the analysis of our teams around the world. We have sought to highlight our key learnings so far and started to identify how attitudes and behaviours around the world may be changing. For these reasons, we have adopted *Signals* as our title. You can access the first edition [here](#); please email IKC@ipsos.com if you would like to subscribe to future editions.

You can keep in touch with our latest research on the [Ipsos website](#) and via our social media channels; your regular Ipsos contacts are on hand to discuss how we can support you to better understand coronavirus and its implications for us all.

IN THIS EDITION:

PUBLIC OPINION AND CORONAVIRUS

Crisis seen as a threat to both health and finances

The fifth wave of our survey on coronavirus finds the public are divided on whether isolation and travel bans will prevent the spread, while border closures have become more acceptable.

INNOVATING DURING CHALLENGING TIMES

Consumer attitudes and behaviours

From our concept testing database analysis based across 93 countries, we found consumers are often more open to new ideas during a crisis since their usual habits have been interrupted.

THE SOCIAL MEDIA CONVERSATION

Combating misinformation

At a time when it is becoming essential to extract sense from the millions of online conversations about coronavirus, we explore how the world's top social media sites are combating misinformation.

CORPORATE REPUTATION AND CORONAVIRUS

Developing an effective response

Considering how fast news around coronavirus is evolving, understanding shifts in public perception about the virus is critically important. This paper sets out early ideas on how organisations can respond to the pandemic.

SPOTLIGHT ON ITALY

Life under lockdown

Findings show the #Istayathome initiative is helping to keep the level of perceived personal threat under control in Italy, but limitations enforced by the government heighten the sense of threat.

SPOTLIGHT ON FRANCE

Online reactions to confinement measures

Our analysis of online conversations following France's lockdown shows that social media can act as a real and positive outlet for the stressful experience of self-isolation.

SPOTLIGHT ON CHINA

Impact and recovery

Three months after the first cases were reported, this report examines the current situation in China, setting out ideas for what other nations can learn from their experience, and what brands can do in these times.

MEDICAL CROWDSOURCING

What are doctors discussing about coronavirus?

This analysis of the G-MED Global Physician Online Community highlights the voice of doctors globally through social data analytics and medical crowdsourcing (problem solving through sharing online).

PUBLIC OPINION AND CORONAVIRUS

Our latest public opinion poll across 14 countries reveals a public divided on whether isolation and travel bans prevent the spread of coronavirus.

More than half of people think the restrictions on travel and mandates for self-isolation will not stop the spread of coronavirus, according to the fifth wave of our regular tracker on coronavirus – conducted 19-21 March.

Of the 14 countries surveyed, majorities in Japan (62%), India (61%), Mexico (59%), Brazil (56%), Germany and Vietnam (both 55%), and Australia (52%) believe social distancing will not work. On the other hand, people in China, Canada, Italy and France appear more optimistic that social distancing will work.

In terms of what measures governments can take to try to limit the spread of the pandemic, there has been an increase across all countries in the number of people who believe their country's borders should be closed until the virus is proven to be contained. The most significant increases are seen in Canada and France (both +28), Germany and the UK (both +23) and Australia (+14).

Headline findings from previous waves of this special coronavirus survey are available on the [Ipsos website](#).

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INNOVATING IN CHALLENGING TIMES

Doing research during a crisis allows businesses to better predict and prepare for what to do next.

The COVID-19 pandemic is an unprecedented event and has certainly created a world which is more complex and fluid than it was at the beginning of the year.

During a time of crisis, consumer attitudes and behaviours go through great change, and some of those new attitudes and behaviours will become permanent. From our research we found consumers are more open to new ideas during a crisis since their usual habits have been interrupted.

To help get a better understanding of how a crisis may impact survey results, we analysed Ipsos' concept testing database of 45,000 concepts based across 93 countries. Specifically, we looked at the last financial crisis, which started in 2008, comparing it to the recent years of 2016-2019. While we realise the current COVID-19 crisis is quite different, there is still a severe financial impact in addition to the health crisis, so we believe the results provide a valuable learning.

This paper, from the innovation research team at Ipsos, presents the key takeaways from our research.

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THE SOCIAL MEDIA CONVERSATION

Top social media sites are combating misinformation around online coronavirus conversations.

With lockdowns in place in many countries due to the coronavirus outbreak, Facebook, Twitter, and other social media platforms are taking on new levels of importance as a connection between families, friends and colleagues, and as a source of news and entertainment.

However, with more people seeking timely and local information from social media and the web, there is an increased amount of false information available. The World Health Organization (WHO) worries that in fighting the coronavirus pandemic, they must also combat an “infodemic”, defined as “an overabundance of information – some accurate and some not – that makes it hard for people to find trustworthy sources and reliable guidance when they need it.”

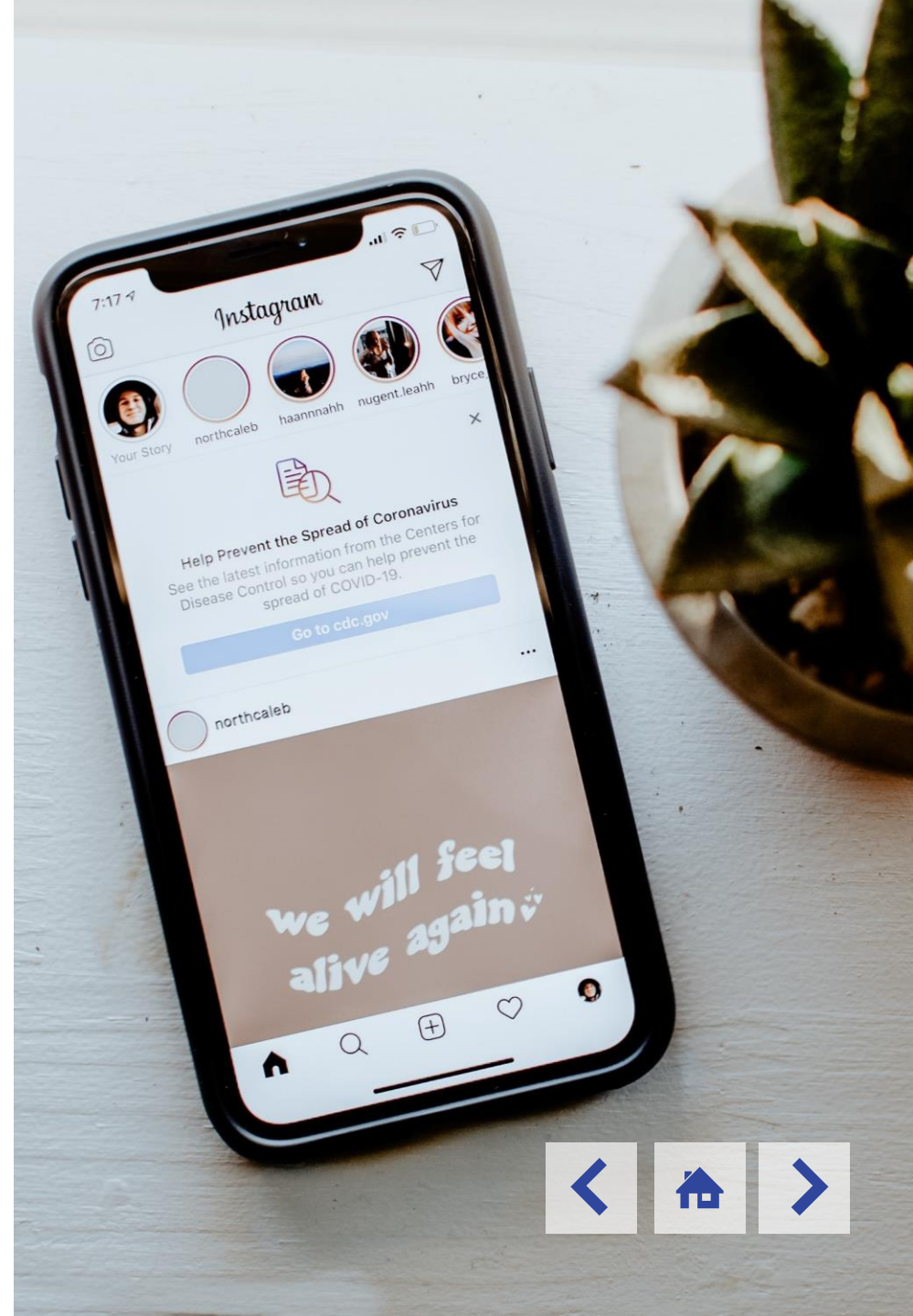
While the top social media sites are unified in their commitment to combat misinformation, it also falls upon the individual to make sure that their information comes from reliable sources.

Using data from Synthesio, our social listening tool, we examine how the world’s top social media sites are combating misinformation in this uncertain time.

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CORPORATE REPUTATION

Unprecedented times require an unprecedented response. This paper sets out early ideas on how organisations can respond to the coronavirus pandemic.

Considering how fast news around the coronavirus is evolving, understanding shifts in public perception about the virus is critically important. Brands and corporations seeking to protect public health, the interests of their employees, and the viability of their businesses, would be well advised to stay informed of changes in public perception as the situation continues to unfold.

Given all the unknowns in the current environment, it can be challenging to prepare for all possible scenarios. Key questions for brands and corporations to consider at this time include, “What are we doing that could be seen as not ‘doing enough’ to mitigate or prevent the spread of the virus?”, and, “Are we doing something that might be actively detrimental to public health and safety?”.

Despite the challenge when planning for the weeks and months ahead, there are a few concrete steps that can be taken to minimise negative outcomes, both to public health and to corporate reputation. This paper offers a set of early considerations based on our expertise in corporate and crisis management.

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SPOTLIGHT ON ITALY

Latest opinion polling from one of the virus hotspots.

In the latest of our reports on Italy, we explore the huge and sudden impact that the coronavirus outbreak has had on the country and its citizens' ways of living. Findings include:

- The #iorestoacasa / #Istayathome initiative appears to be helping to keep the level of perceived personal threat under control, while the limitations enforced by the government heighten the sense of threat, especially for local communities.
- The biggest worry for Italians is health, with 77% most worried about themselves or a family member becoming infected. In comparison, just 16% say their biggest concern is for their occupation, income and savings.
- As the Chinese government send aid and personnel to Italy, 63% have confidence in them in controlling the spread of the infection. This is on a par with confidence in the Italian government (61%), but confidence is lower in how the US government and other European governments are facing the emergency (26% and 25% respectively).
- According to the majority of Italians, the peak of the crisis has not been reached yet, with 55% fearing the worst is yet to come.
- Looking ahead, people desire normal, everyday things such as going out (39%), seeing family and friends (36%), and going for a walk (26%).

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SPOTLIGHT ON FRANCE

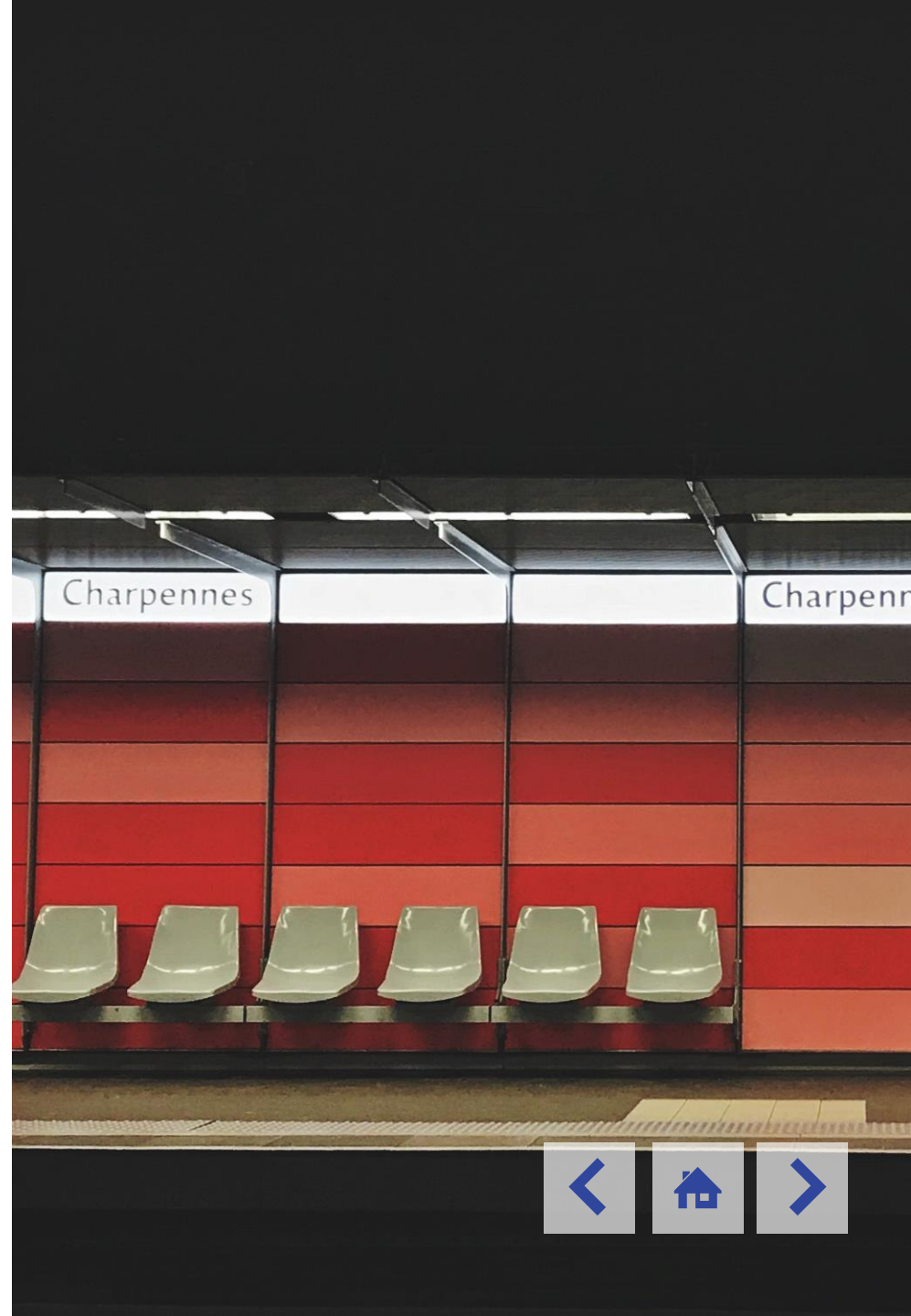
Online reactions to confinement measures.

In the two days following the French government's announcement of a lockdown across the country to tackle the spread of coronavirus, two million public messages were shared in French-language conversations on social media.

Using data from our social intelligence tool, Synthesio, we were able to analyse online conversations in real time. Reactions to self-isolation and its impact overshadowed all other conversations, with over a quarter of conversations from 17-18 March being about the consequences of self-isolation for everyday life. Changing habits were the prominent topic in the interactions, sometimes mentioned solemnly, sometimes with humour, along with sharing experiences and advice about how to make the best of isolation constraints.

Overall, our analysis shows us that humour and shared experiences are everywhere in social media threads, making them a real and positive outlet for the stressful experience of self-isolation.

Meanwhile, our [latest Ipsos/Sopria Steria research](#) for Cevipof explores French people's reactions to the measures taken by their government to combat the coronavirus. It finds 87% support for school closures and 82% in favour of the closing of bars, shops etc. Using mobile phone data to track people's movements is rather less popular, with just 19% supporting such a move.

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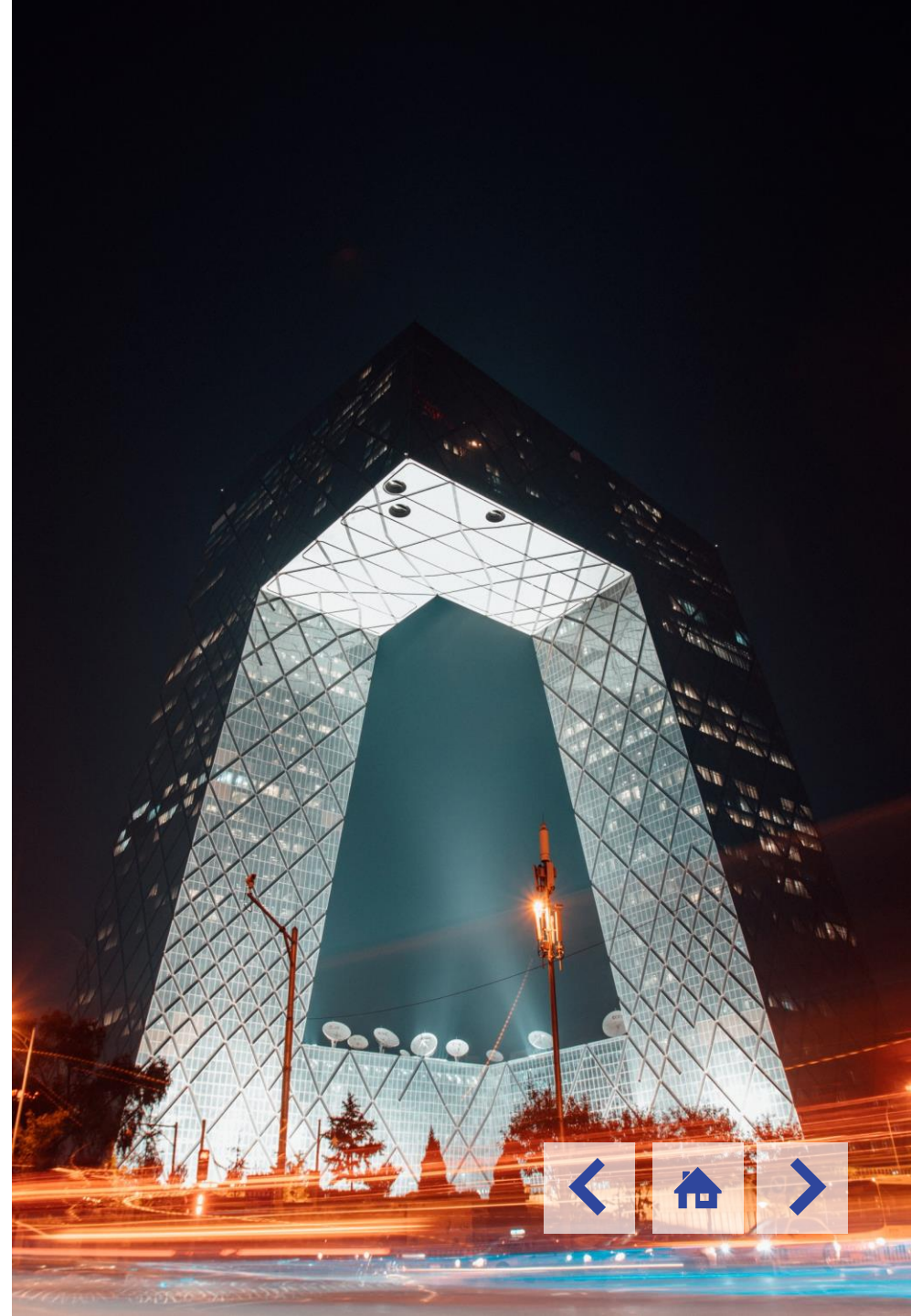
SPOTLIGHT ON CHINA

An analysis of impact and recovery from coronavirus

Three months after the first cases were reported in China, this report examines the current situation in the country, providing pointers as to what other nations can learn from their experience, and what brands can do in these times.

Key learnings:

- **For China** – Many feel that China's recovery from coronavirus will be slower than the recovery from SARS due to China's global integration and the wider impact of the coronavirus, which is now growing worldwide.
- **For other countries** – As infections rise globally and other countries face similar challenges, there are learnings to be taken from China's experience. A key point to note about China's experience of restrictions is how they were cushioned by strong support from digital platforms, cashless payments, and efficient delivery and logistics for products and services.
- **For brands** – Brands have a role to play in addressing new needs and providing reassurance, but consumers are wary of overt commercialism and opportunism as drivers. Brands providing products and services that address practical and emotional issues are well received during the crisis, and there are opportunities here to build your relationship and offer to customers.

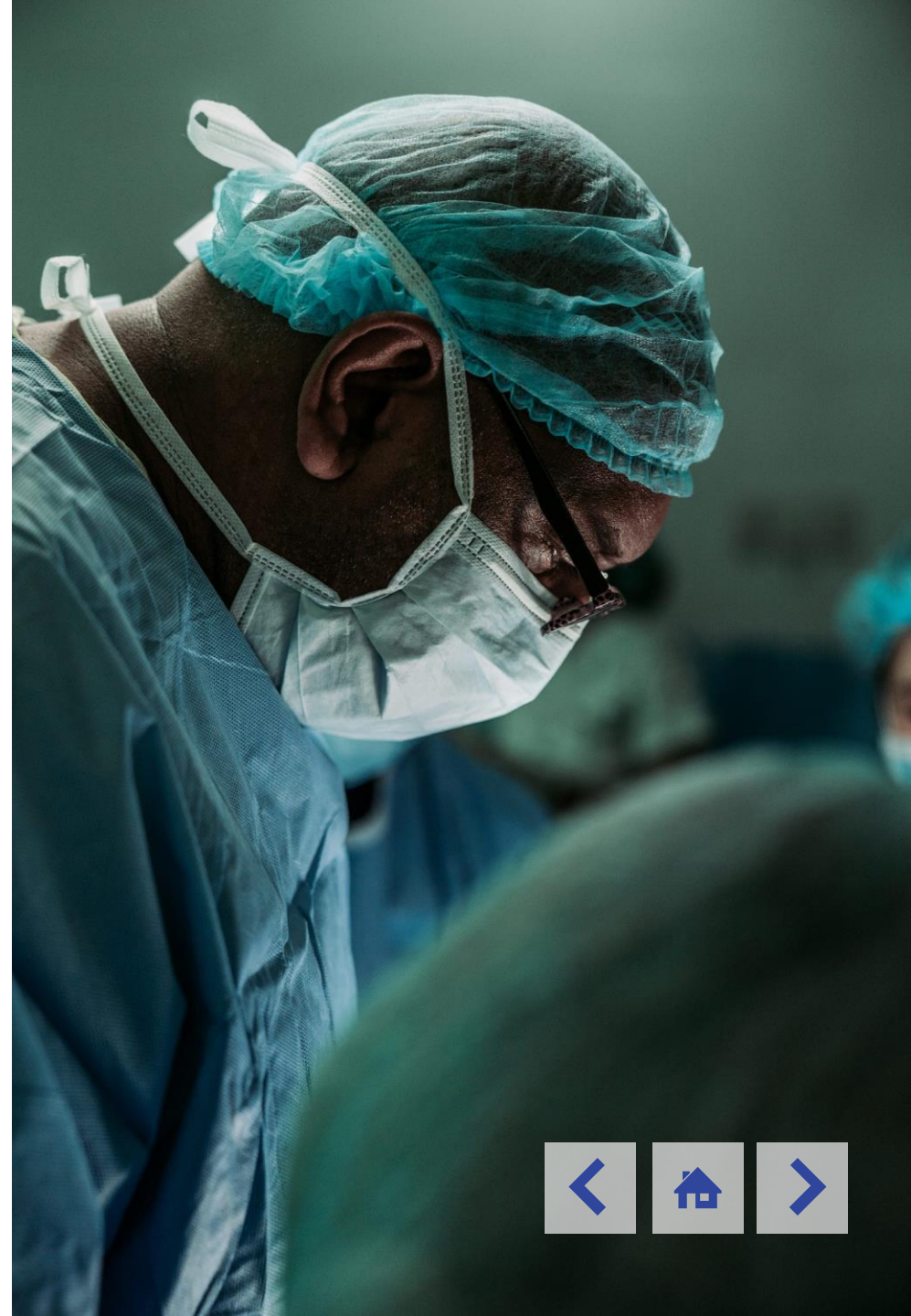
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MEDICAL CROWDSOURCING

Ipsos and G-MED are working together to bring you the voice of doctors from around the world through social data analytics and medical crowdsourcing (problem solving through sharing online).

Doctors on the front lines of this unprecedented crisis are using closed communities to share case examples, experiences, and get advice. From these communities we can see four themes emerging:

1. **Understanding the epidemiology** – Most physicians in the community first post, or respond to posts, related to coronavirus to uncover information about the transmission and control of the virus.
2. **Critiquing government guidelines** – With the rapid spread of the virus, conversations understandably turn to each country's response. Germany and South Korea are viewed as the gold standard, due to their rapid response and widespread testing initiatives.
3. **Preparing selves and hospitals** – Physicians are keen to be as well-prepared as possible. Experiences are shared on virtual care approaches, readying supplies and successful hospital (or individual) guidelines.
4. **Treatment approaches** – Physicians are sharing results of their mini trials with existing medications and coming back to update on the success (or lack thereof) with others on the community.

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SHORTCUTS

IPSOS BIOSURVEILLANCE ATLAS

With entire cities and states going into lockdown mode in the US to contain the spread of coronavirus, shoppers are arriving at grocery stores to find empty shelves and many essential items, like toilet paper and hand sanitiser, out of stock.

The Ipsos Biosurveillance Atlas, an innovative tool designed to give decision-makers critical real-time data, tracked the rise in Twitter and Facebook mentions of empty grocery store shelves and bar and restaurant closures to offer insights into how coronavirus news is spreading on social media.

According to the analysis, the emotions most frequently expressed on social media about supermarket shelves being empty and bar and restaurant closures are fear and distrust of the government.

Bar and restaurant closures are generating more sadness and anger than fear, while empty shelves in grocery stores and supermarkets are generating a greater sense of alarm than sadness or anger.

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A TIME OF ADJUSTMENT

In response to the coronavirus outbreak, the Spanish government declared a state of emergency and imposed a nationwide lockdown to last at least two weeks on Saturday 14 March.

Our team in Spain have been exploring attitudes towards coronavirus through public opinion surveys and qualitative analysis to find out where the public finds itself along a spectrum of emotional stages.

One week into confinement, 55% of Spanish people describe their current state as “adjusting”, in which they are beginning to adapt their day-to-day lives to the restrictions and create new routines.

Our research finds people in Spain to be second only to Italy in perceiving COVID-19 to be a high personal threat. Seven in ten Spaniards think that it will be a long time before the coronavirus crisis is over.

Meanwhile, and still on this topic of “adjustment”, our latest US research finds [three in ten Americans](#) reporting that their emotional well-being has worsened as COVID-19 modifies our daily lives. Some 93% of Americans report washing their hands for at least 20 seconds, while 64% say they have stopped shaking hands.

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TRANSITIONING RESEARCH ONLINE

The decision to move from offline to online research should not be “if”, but when.

With the time and cost benefits, as well as new capabilities offered by online research, transitioning programmes from offline to online should be a key consideration for organisations and researchers around the world.

The decision to do so is not always an easy one, as change often brings disruption to data trends. Online and offline are certainly not interchangeable; the population sample and the answers respondents give will vary in each case. But it is possible to prepare for and manage these changes.

Considering the challenges that the coronavirus pandemic has placed on traditional research methods, this new paper is exceptionally timely. In it, we outline Ipsos’ key learnings from years of experience of moving research programmes online. It aims to help clients make informed decisions on when and how to transition, and what to expect along the way.

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CONTACT

All the information within this document is in the public domain – and is therefore available to both Ipsos colleagues and clients.

We will be producing further editions of this document over the coming period; please email IKC@ipsos.com if you would like to subscribe.

In the meantime our latest research will be shared on Ipsos' websites and social media channels; your regular Ipsos contacts are on hand to discuss how we can support you to better understand coronavirus and its implications for us all.

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