

SIGNALS



Understanding the
coronavirus crisis

Fourth Edition

April 2020

INTRODUCTION – SIGNALS EDITION #4

The defining event of 2020 is the spread of the coronavirus (COVID-19) across the world. Within three months we 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 fourth edition sees us bring together our latest research on coronavirus, drawing on the research and 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 download previous editions from the [Ipsos COVID-19 home page](#); 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

Views on the economy and wearing face masks

A majority of people surveyed in our latest 15-country opinion poll disagree that the economy will recover quickly once the coronavirus lockdown is lifted in their country – suggesting a lasting impact.

INNOVATING IN CHALLENGING TIMES PART 2

Services, durables, and technology

In the second edition of this series, we dive deeper into the dynamics observed in our concept testing database analysis – this time exploring services, durables, and technology.

BRAND RITUALS IN A LOW-TOUCH WORLD

What's next for brands?

We consider how brands should continue to respond to the crisis as they aim to make sure that they are part of the new routines – and rituals – that consumers are starting to establish during this fluid period.

MEDICAL CROWDSOURCING

What are doctors communicating about coronavirus?

In the third wave of our analysis of G-MED's Global Physician Online Community, we share the voices of doctors from around the world through social data analytics and medical crowdsourcing.

GLOBAL CONSUMER CONFIDENCE INDEX

Consumer confidence is at its lowest in years

Our latest Global Consumer Confidence Index fell to its lowest level in more than seven years, with all but one of the 24 countries surveyed registering a significant drop.

SPOTLIGHT ON INDIA

The online conversation

Our latest analysis of what Indians are discussing on social media about coronavirus highlights the sharp difference in the topics dominating mainstream news vs online conversations.

SPOTLIGHT ON THE UK

How Brits are spending their time during lockdown

Social media and children are taking up much of British people's time during the coronavirus lockdown, but many are trying new activities such as baking, gardening, and exercise.

SPOTLIGHT ON BRAZIL

Analysis from Latin America's most populous country

Our detailed study in Brazil finds the population's two main concerns are the spread of the virus and its economic impact – including loss of income and fears about unemployment.

PUBLIC OPINION AND CORONAVIRUS

Many think it is unlikely the economy will recover quickly once lockdown is over.

A majority in 10 of the 15 countries surveyed in our latest coronavirus opinion poll disagree that the economy will recover quickly once the lockdown from the coronavirus pandemic is over – suggesting a lasting impact.

People in Spain (76%), France (72%), Italy (68%), the UK (67%), Russia, Japan (both 64%), and Canada (62%) are most likely to disagree that a quick recovery is on the horizon. Some countries are more optimistic: people in Vietnam (80%), China (68%), and India (63%) are all inclined to agree that the recovery will be swift.

There has also been a gradual increase in the number of people who say they are now wearing a face mask to protect themselves from the virus. This is most common in Vietnam (91%), China (83%), Italy (81%), Japan (77%), and India (76%). But the picture varies, and the wearing of masks is currently a minority pursuit in the UK (16%), Germany (20%), Australia (21%), Canada (28%), and France (34%).

Meanwhile, two-thirds of citizens around the world agree that, in the long term, climate change is as serious a crisis as COVID-19. Our [Earth Day 2020 survey](#) shows widespread support for government actions to prioritise climate change as economies recover after coronavirus, with 65% globally agreeing that this is important.

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INNOVATING IN CHALLENGING TIMES

Researching services, durables, and technology during the coronavirus period.

In our second issue of *Innovating in Challenging Times*, we dive deeper into the dynamics observed in our concept testing database – this time exploring services, durables, and technology. Measuring interest in these categories requires a set of metrics mapped to a much more deliberate decision process, compared to consumer-packaged goods that are bought regularly (see our [previous edition](#) for coverage of this category).

The key points are:

- **The role your products and services play in this environment is critical.** Leverage digital channels, consider service models, demonstrate initiative, and respond to consumer needs. Being empathetic and creating frictionless experiences is key to gaining a strong user base that will outlast the current environment.
- **There is a runway for innovation.** Research results for most services, durables and technology will remain valid for 3-4 years. Expect heightened interest in some categories and drops in others.
- **Future-proof your business decisions by looking for hidden winners.** Average performers can become winners with the right support and commitment.

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BRAND RITUALS IN A LOW-TOUCH WORLD

What's next for brands as we move through the COVID-19 pandemic?

In recent months, the coronavirus crisis has jolted people from their more automatic behaviours with many around the world starting to establish different routines in our new “low-touch” reality. This introduces challenges for brands, but also a unique opportunity for them to connect more deeply with consumers.

Although we can't yet know which behaviours will persist post-pandemic, it is unlikely we will simply snap back to life as it was before. But turning to behavioural science, an understanding of rituals provides insight into how routines can be developed to be durable, repeatable, and imbued with brand-associated meaning – which will make these new behaviours more likely to persist in a post-COVID-19 world.

Our new paper shows how brands can encourage the formation of rituals, including:

- **Identify** new and potentially durable routines.
- Drive the **internalisation** of new habits.
- Illustrate **shared experiences** and **consensus behaviour**.
- Deliver an **aligned brand experience**, laying the ground for repetition.

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MEDICAL CROWDSOURCING

What are doctors communicating with each other during the coronavirus crisis?

In the third wave of our analysis from G-MED's Global Physician Online Community, we bring you the voice of doctors from around the world through social data analytics and medical crowdsourcing (problem-solving through sharing online).

We find doctors are continuously keen to hear and share their experiences of treating confirmed COVID-19 patients. Conversations are starting to turn towards understanding best practice for early treatment and even potential preventative methods, more so in countries at an earlier stage in the pandemic curve.

Unsurprisingly, COVID-19 is having a huge knock-on effect on health systems, with many doctors discussing their experiences of inadequate PPE, insufficient testing rates and patients not having access to services that many deem essential.

While doctors in the community are largely critical of the speed of their government's response to the pandemic, most are now content with the current levels of social distancing that are in place. And we find strong sentiment from doctors that lockdowns and isolations are completely necessary to enable health systems to succeed against COVID-19 – including a commitment that these measures should remain.

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GLOBAL CONSUMER CONFIDENCE INDEX

Global consumer confidence at its lowest in years.

April 2020's Global Consumer Confidence Index fell to its lowest level in more than seven years.

The expectations index, which reflects consumers' outlook on their job, financial situation, and local economy showed an even bleaker picture – declining to the lowest point in its decade-long history.

Since the first reports of the coronavirus outbreak in January, all but one of the 24 countries have registered a significant drop in their National Index. Key findings include:

- Eight countries show a three-month decline of five points or more: Australia, Israel, the US, Mexico, Canada, Hungary, Italy, and Japan.
- In 18 of the 24 countries, the National Index is at its lowest point in at least five years. In six countries (Australia, Canada, Israel, Russia, South Africa, and Sweden), consumer confidence has not been this low since Ipsos started measuring it.
- Eight countries now have a score of less than 40: Turkey, Russia, Italy, Japan, South Africa, South Korea, Hungary, and Spain.

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SPOTLIGHT ON INDIA

We present the second analysis of online conversations in India related to coronavirus.

Using social listening data, we can see Indians first took notice of the coronavirus epidemic in China in late January, when the Indian government stepped in to evacuate its citizens stranded in Wuhan.

Online conversations then lulled, before picking up again in March following the World Health Organization's labelling of the crisis as a pandemic and India's first recorded fatality. However, it was the "Janata curfew" announcement and the lockdown that followed that really pushed the conversation volume to its crescendo.

Our analysis shows a sharp difference in the topics that dominate mainstream news reporting compared to online social conversations. Mainstream news is skewed towards government health measures and information on medical facilities and health infrastructure to tackle the crisis, while we can see that online conversations have been focussed heavily on the impact of the lockdown and curfew.

Further analysis of these online conversations shows that Indians have responded positively to the lockdown situation and have been using social media to urge each other to abide by the regulations imposed. Many office workers appear to be coping well with working from home. However, people in India are expressing concern online about the impact on education, while also sharing their mixed experiences of buying groceries.

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SPOTLIGHT ON THE UK

A round-up of the latest studies from the UK reveals how Brits are spending their time during lockdown.

Our new [Life under Lockdown](#) study finds that while nearly half of Brits (47%) are spending more time on social media, many are also taking this time to do gardening (39%), read books (33%), play board games, and try new types of exercise (both 25%).

The favourite lockdown pastime for the under 35s (after the 57% who are spending time on social media), is trying out new forms of exercise or exercising more (38%), while 55-75 year olds are more likely to have started doing more gardening (52%).

According to BBC Compass, an Ipsos cross-media measurement tool, TV viewing figures in the first week of lockdown were up 18 percentage points on the Q1 average. In this new [white paper](#), we explore the UK's changing media habits during lockdown and the potential opportunities it holds for media brands to win over new and existing audiences.

Meanwhile, a [new survey](#) finds a majority of Brits support proposals for the government to use citizens' mobile data for surveillance to tackle the coronavirus crisis, despite earlier concerns about the use of data tracking.

Almost two-thirds (65%) of the British public support tracking the movements of those diagnosed with coronavirus, and those that they have been in close contact with, in order to advise those individuals to self-isolate. Only 16% oppose this measure.

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SPOTLIGHT ON BRAZIL

Analysis from Latin America's most populous country.

Our polling in Brazil finds the population's two main concerns are the spread of the virus (56%) and its economic impact in terms of loss of income or employment (mentioned by 27%).

The seventh wave of our coronavirus tracker survey found 85% of Brazilians saying they expect things to return to normal by June, slightly higher than the levels recorded in China (78%) and India (83%). Opinion is divided as to whether the economy will recover quickly when the lockdown is over.

Less than half (43%) think that the (federal) Ministry of Health is doing a good job, 40% think the same for public hospitals, 37% for private hospitals, 35% for state governments, but only 29% for mayors or the federal government (though the latter receives higher ratings from elderly people).

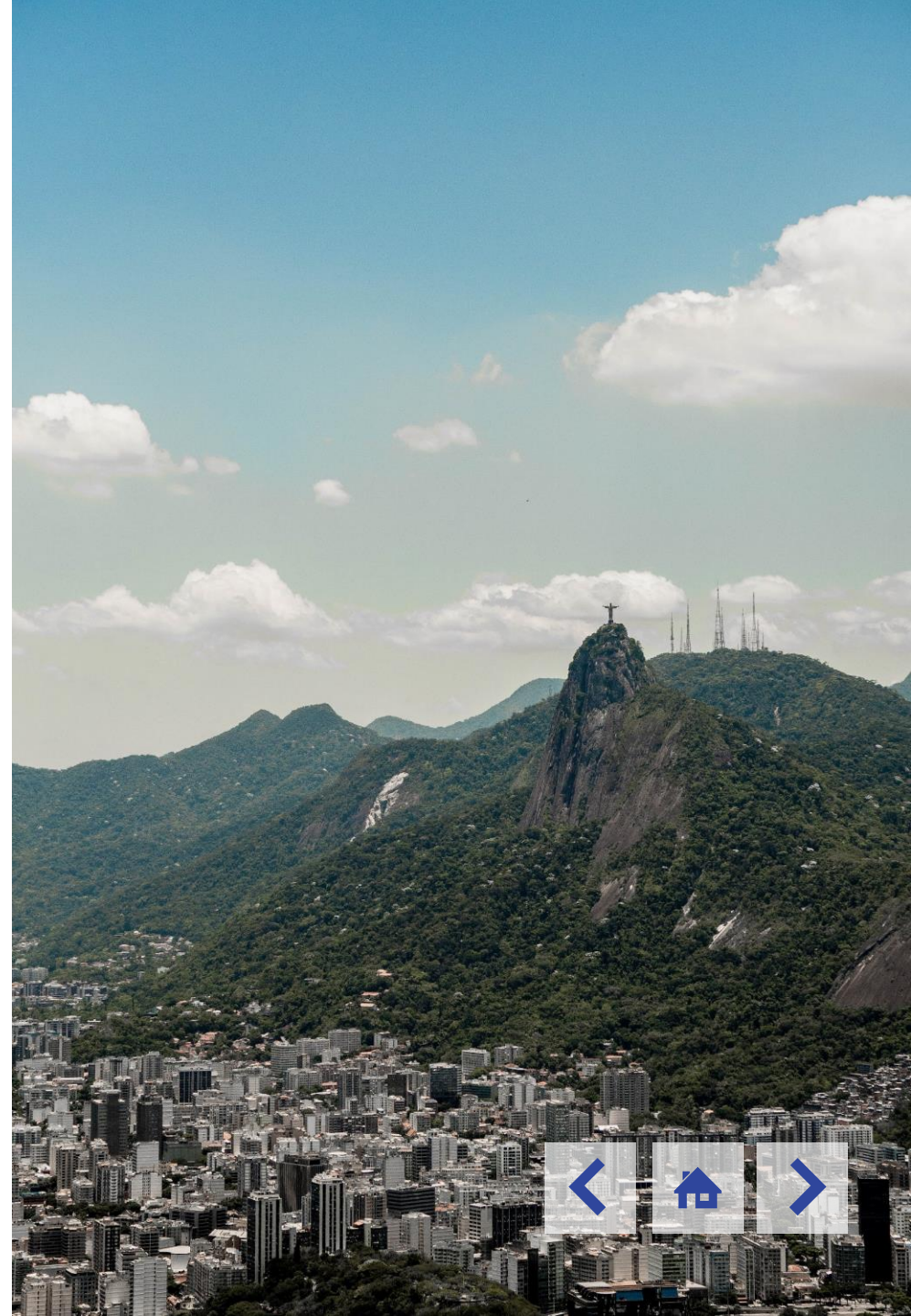
Meanwhile, in our study into doctors' perspectives in Brazil, we asked them about the public's awareness of the risks. Some 64% of doctors feel that Brazilians aren't prepared to face the situation, but 63% affirm that the population is committed to fighting the epidemic.

At the time of interviewing, in early April, the proportion of doctors thinking that a return to normal will happen "60 days from now" stood at 66%.

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SHORTCUTS

THE US SETS IN FOR THE LONG HAUL

The US economy took a big hit when businesses across the country were forced to close following stay-at-home orders. Restaurant, retail, and event workers were hit particularly hard but fear is growing even among people who still have their jobs, according to our [poll](#) with USA Today. Nearly half of employed people (46%) are concerned about being laid off or furloughed, up from 33% last month. The worry is highest among 18-34 year olds (55%).

Americans are settling in for the long haul as it becomes clear that the coronavirus pandemic will affect their lives for the foreseeable future. A majority of people say they don't expect to return to their normal routine until at least July, according to a [new Ipsos poll](#) with ABC News. And 15% of Americans say they don't think they will be back to normal until the end of the year – or longer.

Meanwhile, the latest Axios-Ipsos [Coronavirus Index](#) finds that Democratic and Republican views of the pandemic, which had been moving closer, are starting to diverge again. The latest reading finds 80% of Democrats saying they are concerned about the coronavirus outbreak, a view now shared by just 49% of Republicans.

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THE WORLD UNDER LOCKDOWN

Canadians show widespread support for a [range of measures](#) to combat COVID-19. This includes using the military to help build field hospitals and using empty hotels to house the homeless.

In MENA, the [COVID-19 Consumer Sentiment Tracker](#) records a sharp increase in the numbers of online shoppers, particularly in Jordan, UAE and Saudi Arabia. Staying in Saudi Arabia, the advent of the crisis has seen the average time spent [watching TV](#) increase from five hours in the first weeks of 2020 to six hours today.

In Italy, a majority (66%) believe that people in the country have not totally understood the importance of following the [rules of lockdown](#), while 27% believe that people are respecting the rules.

Three in four French people report that confinement has changed their [sporting routine](#). Some 16% say they are actually managing to do more, but they are outnumbered by the 59% who say they are now doing less exercise.

In Spain, the things people are most looking forward to doing when [lockdown is over](#) are spending time outdoors, meeting up with others and working with colleagues in person again.

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LATAM OPINION LEADERS' SURVEY

The different ways in which the presidents of Latin American nations have handled the health epidemic of COVID-19 has greatly affected their levels of approval, as shown in our latest LATAM opinion leaders' survey.

The president of Uruguay, Luis Alberto Lacalle Pou, currently has the highest approval rating with 59%, followed by Peru's Martín Vizcarra (56%).

Those who were slower in their response to the virus, such as in Mexico and Brazil, are viewed most negatively in terms of their management of the crisis (we see 83% disapproval for both), and this has affected their overall approval ratings.

Across all nations, the police and armed forces, with 78% approval, are seen to have dealt with the COVID-19 crisis the best, ahead of the media, public health bodies, ministries of the economy, and citizens themselves.

Turning to the economic impacts of coronavirus, less than 10% of our respondents expect the region to recover within the next few months. But one in three think that Uruguay, Chile, Colombia, and Peru could bounce back in a year's time.

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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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