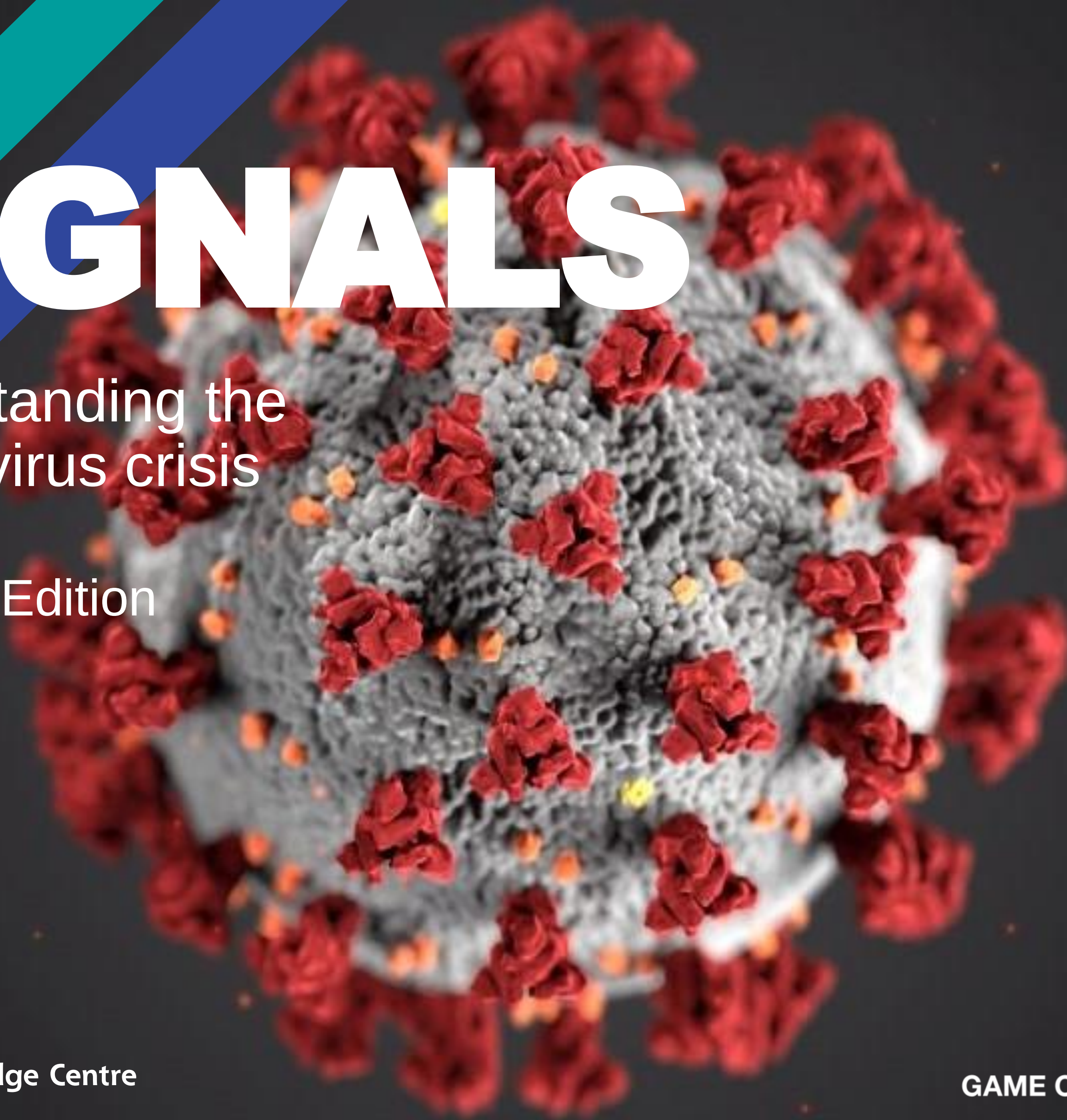
SIGNALS

Understanding the coronavirus crisis

Seventh Edition

June 2020



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INTRODUCTION – SIGNALS EDITION #7

The defining event of 2020 is the spread of the coronavirus (COVID-19) across the world. Things moved quickly: the progression from outbreak to pandemic, the imposition of lockdowns in many countries and, now, the gradual re-opening of society and the economy.

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 act. 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 pandemic.

This seventh 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 are evolving. 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 also 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
Many think opening businesses now is too risky

Our latest 16-country coronavirus poll finds a majority of people in nine countries think that opening businesses now puts too many people at risk of contracting COVID-19 and we should wait at least a few more weeks.

CUSTOMER NEEDS IN TIMES OF CRISIS
Lessons and challenges from the automotive sector

We identify the challenges faced by the automotive industry in the wake of the coronavirus outbreak, and highlight opportunities to adapt to rapid shifts in customer expectations.

MEDICAL CROWDSOURCING
Exploring the mood of doctors during COVID-19

In the fourth 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.

VIDEO GAMING DURING COVID-19
Social distancing is encouraging more gaming

Video gaming has experienced a massive surge in players and revenue during the crisis as a way to connect with others. Using social listening data, we examine what people are saying online about video gaming.

SPOTLIGHT ON JORDAN
The impact of COVID-19 on consumer sentiment

Uncertainty regarding the country's economic future has led to a fall in the *Jordanian Consumer Sentiment Index* for the first quarter. However, Jordanians' trust in the government is at an all-time high.

SPOTLIGHT ON INDIA
Latest opinion polling reveals feelings of caution

Urban Indians are responding cautiously to the easing of lockdown. Only half feel comfortable about returning to the workplace, and many feel uncomfortable about allowing children to return to school.

SPOTLIGHT ON JAPAN
Behaviours and attitudes in a post-COVID world

We identify six potential areas of lasting change in people's behaviours and attitudes when the pandemic ends, and look ahead to what may be expected from companies and brands in response to the crisis.

SPOTLIGHT ON THE US
Reactions from Americans as reopening begins

Our round-up of the latest opinion polling from America finds growing support for the US economy reopening, yet less than half of Americans are in favour of schools reopening before there is a coronavirus vaccine.

PUBLIC OPINION AND CORONAVIRUS

Many think opening businesses now is too big a risk.

Our latest 16-country coronavirus poll finds a majority of people in nine countries think that opening businesses now puts too many people at risk of contracting COVID-19.

People in Brazil (71%), India (69%), Mexico and South Korea (both 65%), and Japan and the UK (both 62%) are most likely to say we need to wait at least a few more weeks before reopening. In comparison, those in China (65%), Italy (64%), France (59%), Germany (57%), and Russia (55%) are most likely to say the health risk is minimal if people follow social distancing rules, and we need to get the economy moving again.

Added to this, many people disagree with the proposition that "most jobs that have been lost during the lockdown will return", suggesting those that support reopening are doing so in spite of the risk, rather than believing the risk is low.

Meanwhile, our previous wave found more people saying they are suffering from under-exercising and anxiety than any other health concern. About one third of the respondents in 10 countries say they are under-exercising because of COVID-19 and about a quarter of people in 11 countries say they are suffering from anxiety. There is also a clear gender divide, with women more likely than men to say they are impacted in all 11 of the health categories, except for alcohol consumption and increased smoking.

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CUSTOMER NEEDS IN TIMES OF CRISIS

Lessons and challenges from the automotive sector.

For decades, the heart of automotive service delivery has relied on face-to-face interactions. However, like many sectors, the unprecedented COVID-19 pandemic has forced the automotive industry to immediately adapt.

What can we learn by taking a closer look at how the automotive industry has reacted so far to this challenging new global landscape? In this new paper from our Customer Experience team, we provide insights into:

- The effect of COVID-19 on consumer needs and behaviour.
- How the industry is adapting to rapid shifts in customer expectations.
- The re-shaping of retail facilities and customer handling processes.
- The long-term view of what a post-coronavirus world looks like for automotive.

By identifying the challenges faced by the automotive industry, we can highlight opportunities for other industries to adapt to the changing global landscape so they can continue to deliver a customer experience that fulfils the brand promise.

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MEDICAL CROWDSOURCING

What is the mood of doctors during COVID-19?

In the fourth 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 (problem-solving through sharing online).

We find that, just like everyone else, physicians are having to deal with a range of emotions while continuing with their day jobs. Posts on the G-Med forum show that doctors are feeling overwhelmed by the quantity of information and sources, and feel fearful about insufficient resources such as PPE.

There are also concerns about reduced face-to-face patient communication. Physicians are using telehealth to remotely monitor some patients. Posts on the community reflect a sense that this shift towards virtual is not just a temporary one, with 76% saying they believe they will do more virtual visits in the future, post-pandemic.

Meanwhile, our new report on robotics in healthcare explores the future of robotic technology in the operating room. Recent years have seen a significant rise in the use of sophisticated and automated technology during surgery. We examine the views of leading robotics surgeons around the world on what has worked well, where improvements are needed, and what the future will hold for robotic surgery.

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VIDEO GAMING DURING COVID-19

Social distancing and lockdown has encouraged video gaming as a way to connect with others.

Since the outbreak of coronavirus and the subsequent lockdowns and social distancing guidance across the world, video gaming has experienced a massive surge in players and revenue.

Using social listening data, we examine what people are saying online about gaming. Nearly all major gaming companies are driving a significant amount of discussion. Online mentions for each brand reveals they jump to the top of the conversation when they host virtual events, release new games and consoles, or update/upgrade existing games.

With a global audience exceeding three billion, the games industry also has a lot of influence. They can help spread necessary messaging to users around self-isolation and social distancing. For example, multiple initiatives have launched in recent weeks including #PlayApartTogether – a coalition of 18 video game companies encouraging players to physically distance themselves during the coronavirus crisis by playing video games.

Overall, sentiment analysis shows that positive mentions about gaming occur nearly twice as often as negative mentions. This result is likely due to the welcome distractions and sense of community that many games are fostering.

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SPOTLIGHT ON JORDAN

The impact of COVID-19 on consumer sentiment.

Like most countries across the world, the COVID-19 pandemic in Jordan has halted 2020 economic plans and forced the government to focus on the imminent health and economic threats posed by the crisis. Uncertainty regarding the country's economic future has led to a 3-point decrease in the *Jordanian Consumer Sentiment Index* for the first quarter.

The country's strict lockdown has brought the economy to a standstill, causing Jordanians to share a bleak outlook regarding the future. Around eight in 10 report feeling less comfortable making household purchases and 84% feel less capable of committing to major expenditure.

However, Jordanians' trust in the government reached an all-time high with almost half expressing high confidence towards government actions following the early adoption of strict measures to prevent the spread of coronavirus.

Using social intelligence data, we also analyse conversations that Jordanians are having about COVID-19 online, with a focus on organic posts regarding the economy.

Findings show that, at the start of the crisis, more people were prioritising health and containing the virus. As time went on, priorities shifted towards the economy. Now, Jordanians are more worried about their current personal finances and meeting their family's essential needs such as food, rent and utility bills.

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SPOTLIGHT ON INDIA

The latest public opinion research from India reveals a cautious response to the easing of lockdown.

Urban Indians are responding cautiously to the easing of lockdown restrictions, with only one in two saying they feel comfortable about returning to the workplace during the coronavirus pandemic.

At the same time, many feel unsure about allowing children to return to school. Our poll found 45% were uncomfortable, 18% were keen to postpone the return to school by a few weeks, and 37% said they were comfortable.

Meanwhile, consumer confidence in India has dropped sharply by 8.9 percentage points according to the latest monthly *Refinitiv-Ipsos Primary Consumer Sentiment Index*, due to the prolonged lockdown and the impact of the COVID-19 pandemic.

The index, ongoing since 2010, is a monthly national survey of consumer attitudes on the current and future state of local economies, personal finance situations, savings, and confidence to make large investments.

The latest results have continued a downward trend across all four sub-indices in India. Compared with the previous month, the Jobs Index is down by 5.3 points, the Expectations Index has receded by 7.9 points, the Current Conditions Index has dropped significantly by 11.7 points, and the Investment Index has plummeted by 12.9 points.

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SPOTLIGHT ON JAPAN

Behaviours and attitudes in a post-COVID world.

Using the latest opinion polling, our team in Japan have identified six potential areas of lasting change in people's behaviours and attitudes in a post-COVID world:

- **Protecting the self:** coronavirus is perceived as an immediate threat in terms of both physical and economic self.
- **Discovering inner life:** as the virus forces people indoors, it is also helping them discover leisure at home.
- **Enduring connection:** connecting with others face-to-face continues to be of great value.
- **Rethinking life at work:** 5% of people say they were already commuting less and working remotely prior to COVID-19, and 15% say they will do so post-pandemic.
- **Expecting more from companies:** many are wondering why corporations are not showing greater flexibility.
- **Environmental sensitivity:** Japanese people are among those least likely to prioritise sustainable consumption, but the current crisis may shift attitudes and spur meaningful change.

In this webinar and presentation, we anticipate which behaviour changes are likely to continue beyond the current crisis, and look ahead to what may be expected from companies and brands.

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SPOTLIGHT ON THE US

Reactions from Americans as reopening beings.

Generally, there is growing support for the US economy to reopen. Half of Americans now agree the country should restart the economy even if the virus is still not fully contained, up from just over one third a month ago, according to the *Ipsos Global Consumer Confidence Index*. It's the first time those against reopening the economy have not been a majority.

However, the latest *Axios-Ipsos Coronavirus Index* shows that as lockdown restrictions loosen across the country, experiences and fears vary widely by race and partisanship, potentially fuelling the dramatic protests observed over the last week.

Summer is just beginning in the US, but parents and teachers are already looking ahead to the fall – and many don't like what they see. Nearly two-thirds think it is likely that schools will re-open in the fall, according to our poll, yet less than half support returning to school before there is a coronavirus vaccine. And one in five teachers say it is likely they would not return to teaching if their school was to reopen.

The pandemic has upended one of the most American things about the past 75 years: driving. As we look ahead, our US team have sketched three versions of how the pandemic might play out — one hopeful, one dire and one in between — and then asked experts how the world of transportation might change in each.

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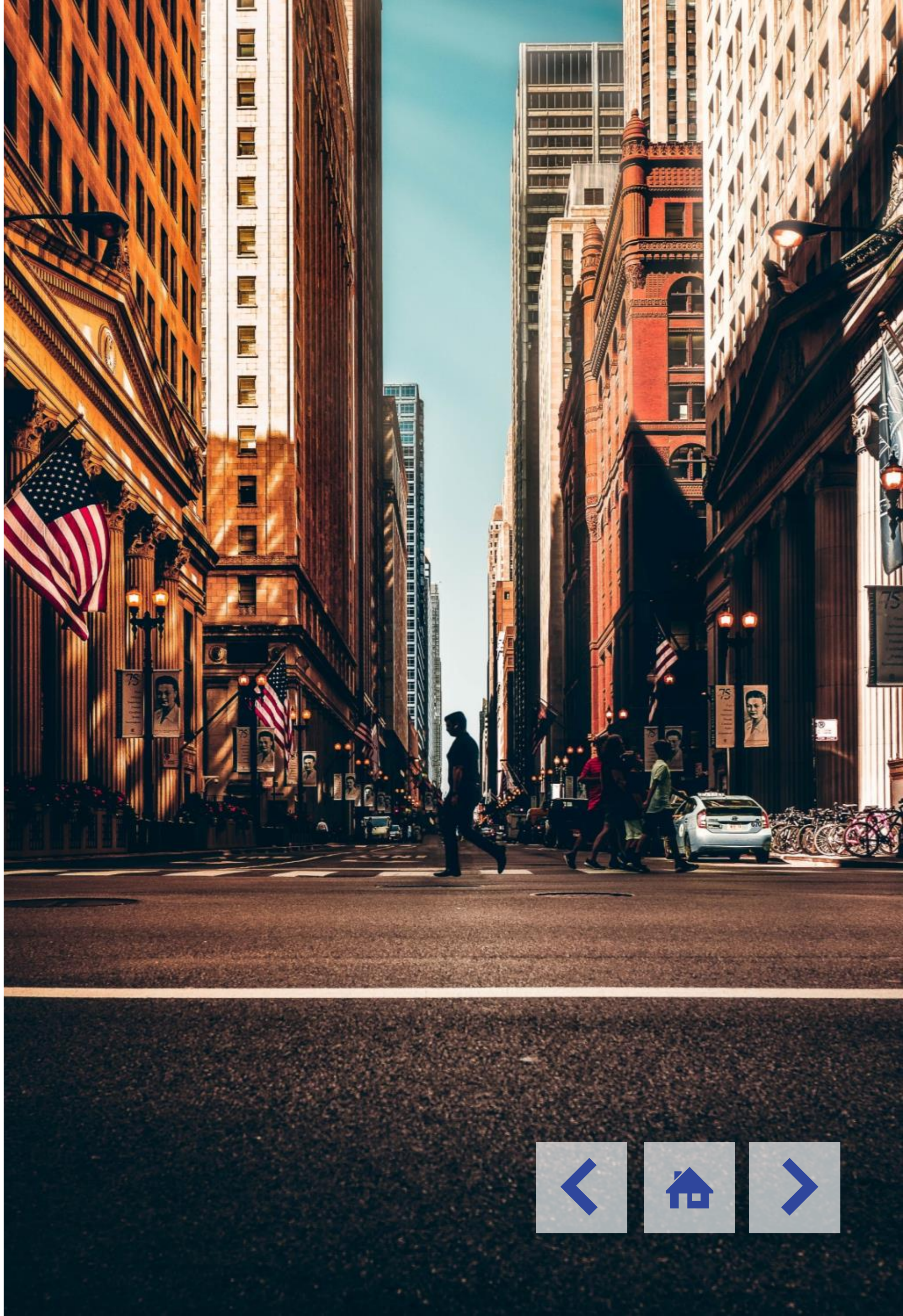

SHORTCUTS

REOPENING WITH CONFIDENCE

As the economy and businesses start to reopen, brands must take steps to build consumer trust by adapting to new health and safety expectations. With no guidebook for success, most companies are struggling to understand which health and safety practices will have the greatest impact on consumer confidence and how these policy changes will improve trust, loyalty, and profits.

Findings from Ipsos' *Consumer Health and Safety Index* show that – for the brands that get it right – there is an opportunity to gain market share, charge a premium, and increase enterprise value.

In this paper, we look at three important questions for businesses:

- What are consumers' new and evolving attitudes towards health and safety?
- What specific actions can brands take to make consumers feel safe while shopping or eating at their locations?
- What can brands do to proactively measure and manage health and safety across their retail network?

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UPDATES FROM THE COUNTRIES

The latest *Ipsos Issues Monitor* in Australia finds the economy has replaced healthcare as the top issue facing Australians amid the COVID-19 crisis, cited by 53%, with unemployment as the second most nominated issue (43%).

Similarly, in Italy, new polling shows healthcare worries are slowly decreasing as the perception that the worst of the crisis is now over rises by 7 points.

New social listening research from Spain reveals that, since the easing of lockdown in the country, coronavirus mentions on social media have dropped by almost half.

In the UK, a new survey on public attitudes towards a potential smartphone app to 'track and trace' coronavirus finds that more than six in 10 Brits (62%) say they are likely to download the app once it is released.

Meanwhile, in Brazil, our opinion poll shows seven out of ten people (68%) would not feel comfortable returning to their workplaces in the coming weeks, with 20% of those categorically stating that they would not return to work in the proposed period.

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IPSOS WEBINARS ON CORONAVIRUS

Our ongoing series of webinars explore public opinion and expert insights related to the coronavirus pandemic, and are designed to give our clients greater clarity on the crisis. Visit our dedicated page of upcoming webinars and catch up on those that have already taken place.

Recent webinars include The Forces of Customer Experience, discussing Ipsos' new human-centric framework that will enable organisations to drive stronger relationships through a better understanding of customers' functional and relational needs (download the POV).

Meanwhile, Shaping the Future - Portfolio strategy has never been more topical than now addresses the issue of whether the portfolio of brands that a company owns is structured to capture the consumers of tomorrow, while still generating profits with the consumers of today (webinar in Italian).

Finally, revisit our broadcast of The Path Forward: Canada's Creative Fightback to hear our panellists discuss the dos and don'ts for advertisers during this time of COVID-19 and the forthcoming return to 'normal'.

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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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