

SIGNALS



Understanding the
coronavirus crisis

Ninth Edition

July 2020

INTRODUCTION – SIGNALS EDITION #9

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, in recent weeks, 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 months. Governments remain under pressure to lead and act. Businesses – large and small – have been trying 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.

Our ninth 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 and started to identify how attitudes and behaviours are evolving. For these reasons, we adopted *Signals* as our title.

This is the final edition of the series in this format; the forthcoming tenth edition will provide an index to the story so far. You can download previous editions from the [Signals home page](#), please email IKC@ipsos.com if you would like to subscribe to future publications from Ipsos.

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:

COST OF LIVING AMID COVID-19

Majority say overall living costs have increased

Our latest global survey reveals three in five people believe the overall cost of food, goods and services have increased for them and their families since the outbreak of coronavirus.

PRODUCT TESTING IN CHALLENGING TIMES

Be contactless, leverage technology, get social

In this new paper, Ipsos' Innovation research experts outline how our approaches to product testing have been adapted to meet the new challenges brought about by the pandemic.

THE ROLE OF CULTURE IN A GLOBAL CRISIS

How shared values shape individual behaviour

Culture kicks in stronger in times of crisis, and is responsible for some of the different responses to COVID-19 we see around the world. Our paper shows why now is a great time for brands to explore cultural drivers.

THE FUTURE OF TRAVEL AND HOSPITALITY

What will recovery look like?

As part of our ongoing *What the Future* series, we explore near future patterns, data and consumer behaviours that will shape the recovery of the hard-hit travel and hospitality industries.

SOCIAL LISTENING

Tracking the conversation on COVID-19

Despite COVID-19 being a global pandemic, many parts of the world are responding to their respective outbreaks very differently. We examine online conversations in three countries: China, France and the US.

SPOTLIGHT ON SAUDI ARABIA

Attitudes towards the post-lockdown era

This report from our team in Saudi Arabia reveals public expectations surrounding the impact of COVID-19, including a look at how long people think it will take for different aspects of life to return to normal.

SPOTLIGHT ON THE US

COVID-19 and racial inequality key political issues

As coronavirus cases spike across the nation and the 2020 presidential election nears, new polling finds COVID-19 to be the top political issue for Americans, with racial inequality emerging as the fastest-growing concern.

SPOTLIGHT ON AUSTRALIA

Latest findings from the Ipsos Issues Monitor

2020 has seen ongoing crises across Australia – from the bushfires at the start of the year to the COVID-19 pandemic. Our *Ipsos Issues Monitor* reveals what Australians are most concerned about, and what's changing.

COST OF LIVING AMID COVID-19

Majority say cost of food, goods and services have increased since COVID-19 began.

Three in five people (60%) across 26 countries say the overall cost of food, goods and services have increased for them and their families since the outbreak of coronavirus, according to our latest global survey. Those in Argentina, South Africa and Mexico (all 81%), and Turkey (80%) are most likely to say prices have increased somewhat or a lot. In comparison, over a quarter of people in Hungary (27%) and South Korea (26%) say costs have decreased since the outbreak began, followed by Japan and Russia (21% in each).

Globally, people say the biggest cost increase has been in relation to food, groceries and household supplies (63%), followed by utility bills (39%), personal care and beauty products (28%), healthcare (27%), and entertainment (25%).

In terms of where costs remain unchanged, over three-quarters of people (78%) say housing costs such as rent and mortgage payments have stayed the same, followed by insurance (77%), taxes (73%), and education and childcare (70%).

Meanwhile, more than a third (36%) of people around the world say transportation use such as vehicles, buses, trains and fuel costs have decreased – likely the result of less travel as restrictions curtailed daily activities and forced many to work from home.

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ADAPTING PRODUCT TESTING IN CHALLENGING TIMES

Be contactless, leverage technology, get social.

COVID-19 is impacting consumers, businesses, and governments in unprecedented ways. In times of such uncertainty, smart actions can help companies be poised for growth when recovery begins.

Now is the time to plant the seeds for future product success, especially when products are called upon to meet new needs and nurture strong brand connections.

Continued product development and evaluation are necessary to ensure high levels of product satisfaction and repeat purchasing. However, the product testing methodologies used must change to reflect the new realities we're facing. Moving forward, to help businesses grow, product testing will need to:

- Be contactless
- Leverage technology
- Get social

In this new paper, Ipsos' Innovation research experts outline how our approaches to product testing have been adapted to meet the new challenges brought about by the pandemic.

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THE ROLE OF CULTURE IN A GLOBAL CRISIS

How shared values shape individual behaviour.

While the jury is still out on how much and how deeply the world will change following the coronavirus pandemic, there is no doubt that it has disrupted life, livelihoods and health across countries and cultures. Consumption cycles have not stopped, but various aspects are being reshaped through different contexts and needs – placing greater demands on brands.

As some of the universal aspects of the current pandemic play out, we also see very different approaches, strategies and responses across the globe. Underpinning these differences is the role that culture plays in shaping our behaviour.

Culture kicks in stronger in times of crisis. In times of uncertainty, culture anchors consumers to the familiar, providing meaning and helping them to cope with any anxiety that arises.

This paper shows that government messaging and personal responses to the crisis have been shaped by culturally relative concepts, highlighting the importance of understanding cultural drivers and local nuances.

Now is one of the best times to invest in cultural profiling across different markets. Without a deeper cultural understanding, brands may struggle to build meaningful, authentic and intuitive engagement now and in a post-COVID-19 world.

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THE FUTURE OF TRAVEL AND HOSPITALITY

What will recovery for these sectors look like?

The travel and hospitality industries have been hit especially hard by COVID-19 and the outlook for the future is mixed at best. As part of our ongoing *What the Future* series, we explore the near future patterns, data and consumer behaviours that will shape their recovery.

Our [What the Future travel report](#) outlines three potential future scenarios played out through a travel lens – one hopeful, one dire and one in between – each grounded in Ipsos data and expert commentary. And our supporting [webinar](#) reveals the latest trends in business and leisure travel, including a look at the impact on customer loyalty programmes and financial services.

Meanwhile, this report into [hospitality post-coronavirus](#) examines implications and potential solutions for the hospitality industry. According to our 14-country global poll, three in ten (29%) people say they would feel comfortable travelling by air within their country at some point in 2020, with agreement for this strongest in India (49%) and Australia (41%). When it comes to staying in a hotel within their country, 37% of people globally say they would be comfortable doing this at some point in 2020, with support for this strongest in France (49%), Australia and Italy (both 47%).

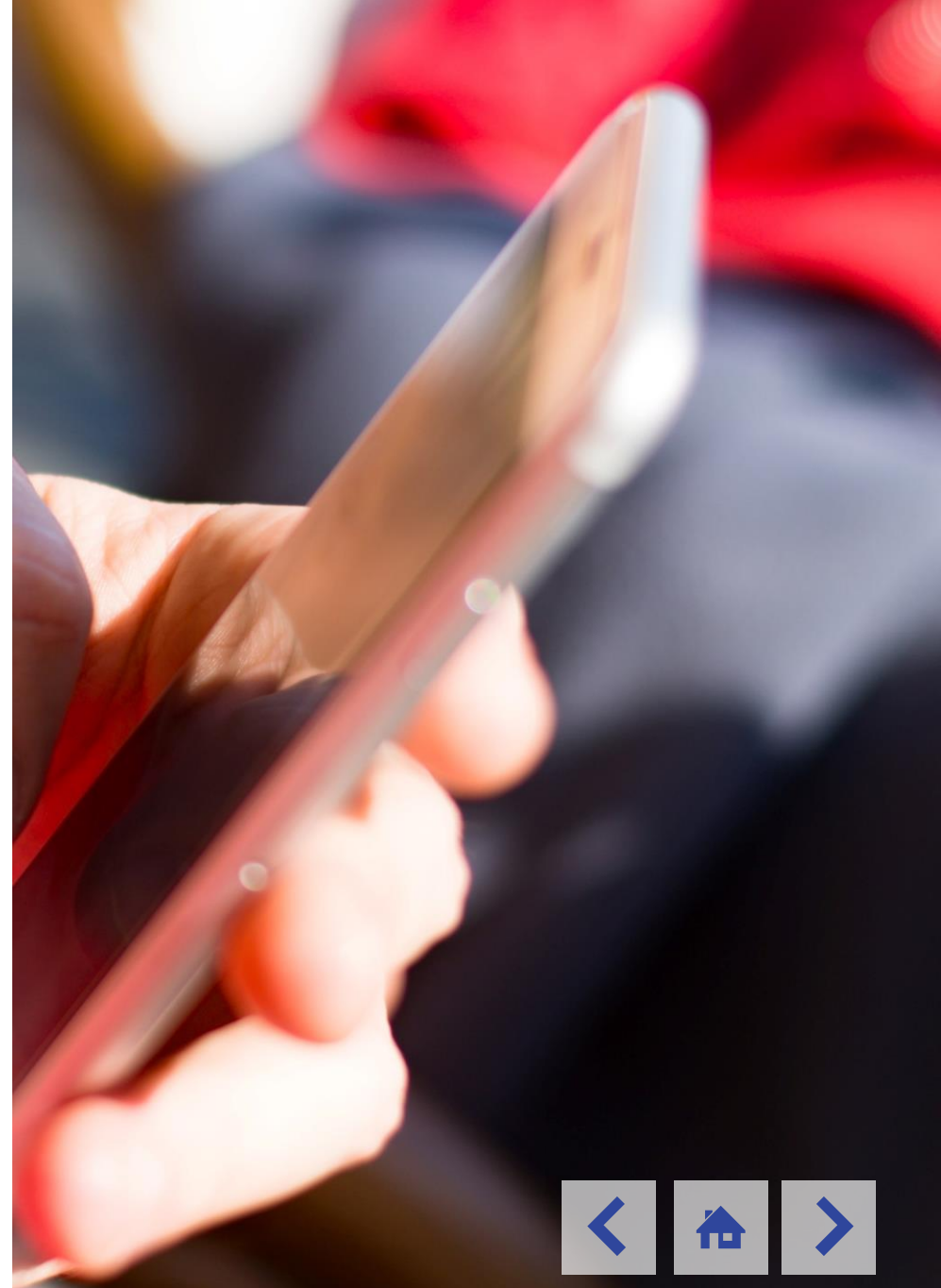
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SOCIAL LISTENING

Tracking the conversation on COVID-19.

Through our social listening platform, Synthesio, we are closely tracking millions of online conversations to help our clients make informed and timely decisions. Despite COVID-19 being a global pandemic, many parts of the world are responding to their respective outbreaks very differently. In our latest analysis, we examine online conversations in three countries: China, France and the US.

- **China:** Many online conversations have discussed the quick containment of COVID-19, praising the strength of the Chinese government and healthcare system. Small numbers of new cases have caused concerns about a second wave, but the conversations online have turned more towards discussing the international response.
- **France:** While France was initially one of the hardest hit European countries, measures by the French government regarding quarantines, containment and sanitation have meant that the country has lowered its infection rate greatly. However, many credit the ability to return to normal life to the actions of French citizens themselves, who have followed the advice of scientists and doctors.
- **US:** A resurgence in cases in the southern and western states following the relaxation of social distancing rules has led to anger, frustration and shock among many. Meanwhile, keyword analysis reveals a uniquely American emphasis on restarting the economy and keeping businesses alive.

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SPOTLIGHT ON SAUDI ARABIA

Attitudes towards the post-lockdown period.

This report from our team in Saudi Arabia explores the public mood on the impact of COVID-19, including a look at how long people think it will take for different aspects of life to return to normal.

More than half of people in Saudi Arabia believe that there should be a balance between slowing down the spread of the virus and trying to uphold the economy as best as possible. Just under a third (31%) believe that it will take between three and five months to feel that things are getting back to normal, while 44% think that it will take between six months and a year.

While people are divided between those who are comfortable going back to work (52%) and those who aren't (48%), the vast majority still do not feel at ease dining out, going to the gym, cinema, or attending live events. As for shopping, over half feel comfortable going to the supermarket (55%) and having their groceries delivered to their homes (54%), while 63% are still uncomfortable about visiting a shopping mall in the next few weeks.

When it comes to people's assessment of the current situation vs. what they had expected at the start of the pandemic, around a third believe the situation is worse than they had expected, while around half said it was in line with their expectations.

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SPOTLIGHT ON THE US

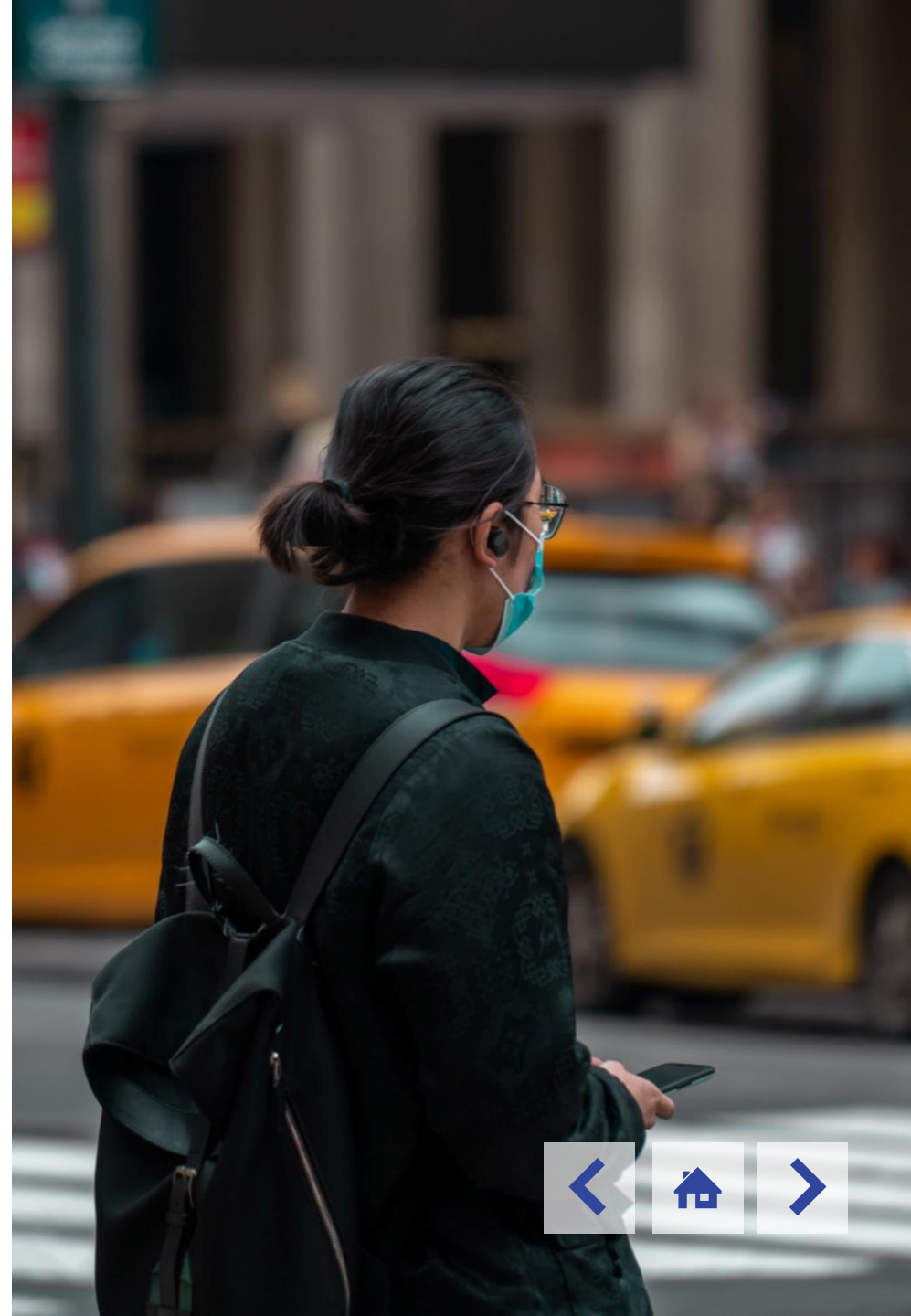
COVID-19 and racial inequality among the top political issues for Americans.

As coronavirus cases begin to spike across the nation and the 2020 presidential election nears, the latest [Newsy/Ipsos poll](#) finds just under half (45%) of Americans saying that the COVID-19 pandemic is one of the most important political issues to them right now.

Compared to late last year, the most rapidly growing issue is racial inequality: more than four times as many Americans now, compared to the end of 2019, think it is one of the most important current political issues (31% today vs. 7% in December). Some groups are more likely to place racial inequality ahead of the COVID-19 pandemic as an issue, including Gen Z (60% racial inequality versus 35% COVID-19 pandemic) and Black or African Americans (62% versus 45%).

Meanwhile, the latest [Consumer Confidence Index](#) shows Americans remain divided on the question of whether the economy will recover quickly once restrictions are relaxed (49% agree, 46% disagree). This split is driven by partisan differences in opinion – Republicans tend to think that the economy will bounce back quickly and favour reopening, while Democrats tend to hold opposing views on both counts.

Overall, the confidence index is about 13 points lower than it was at the beginning of the year (63.4), 10 points lower than in early March (60.1) and 2 points lower than its historical average.

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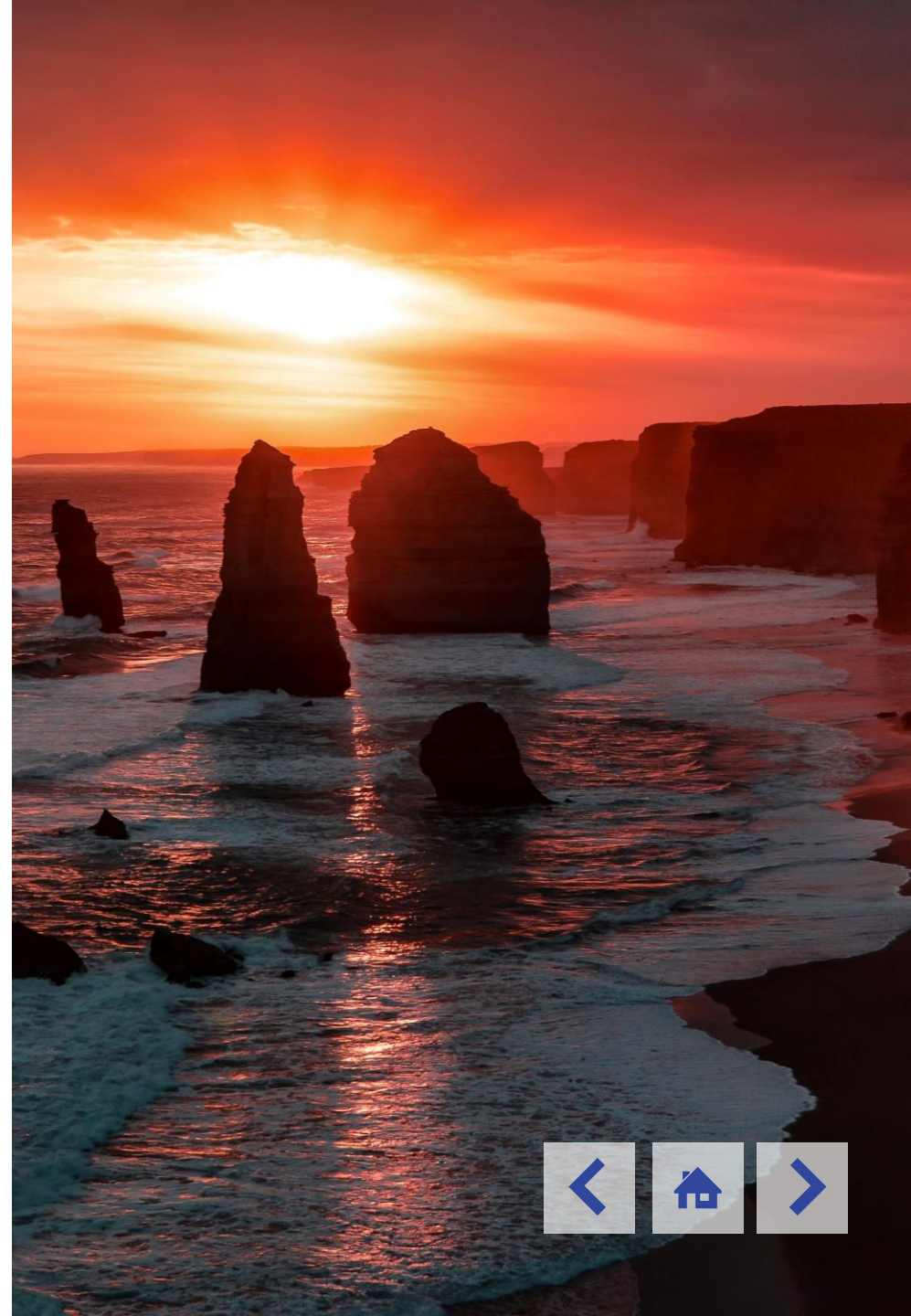
SPOTLIGHT ON AUSTRALIA

Latest findings from the Ipsos Issues Monitor.

2020 has seen ongoing crises across Australia – from significant environmental issues (bushfires, floods) at the start of the year to the COVID-19 pandemic. The uniqueness of the situation Australians have been living through and the speed at which things are changing are reflected in the unprecedented levels, and variability, of the main issues measured in the *Ipsos Issues Monitor* over the past six months.

At the beginning of the year, we saw the Environment take over as the issue of greatest concern to Australians, and reach its highest level (41%) since the Issues Monitor began in 2010. COVID-19 became real for Australians in the second half of March as restrictions were put in place, and we saw the initial health concerns around the pandemic reflected in April with Healthcare having the highest level of concern (at 55%) seen since 2010. With contagion and deaths managed at levels well below the worse-case scenarios, the concern around Healthcare dropped substantially in May (36%) and June (24%). The next measurement will provide the opportunity to assess the impact of July's tightening of restrictions, including the lockdown in Melbourne, on the national mood.

Concern around Cost of Living, which was the issue of greatest concern back in December 2019, fell away between January and April. Although starting an upward trend again after April, at 26% in June, it is still relatively low from a historical perspective.

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SHORTCUTS

CONSUMER HEALTH & SAFETY INDEX

As the economy and businesses continue to reopen, brands must take steps to ensure consumers feel safe while shopping at their locations.

Ipsos' *Consumer Health & Safety Index* determines the safety initiatives that are most important to customers and measures how effectively brands are meeting those needs.

In our [UK survey](#) of more than 2,000 consumers, over two-fifths report not feeling comfortable visiting shops and other stores in person, while just one in five state they felt a 'great deal of effort' had been made to keep customers safe while shopping.

Meanwhile, [in the US](#), we find American consumers consider certain health and safety practices more critical than others. These include the consistent use of company-issued face coverings, managing the number of customers entering stores, and employees visibly wiping down high-traffic areas. During 5,700 in-store visits, Ipsos uncovered several gaps between these consumer expectations and what was actually observed at the stores.

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UPDATES FROM THE COUNTRIES

In the Philippines, we find [94% of Filipinos are worried about COVID-19](#), with 38% indicating their income has dropped by more than half since the outbreak began.

With most Southeast Asian countries now easing restrictions and reopening their economies, [this new report](#) examines what businesses and policymakers will need to consider to get consumers spending at pre-COVID levels.

Meanwhile, our [new poll in the UK](#) reveals a majority of Brits (60%) feel the government is relaxing lockdown measures too quickly, with just 28% agreeing it is about the right time.

In Italy, several local outbreaks appear to have reactivated fears, and our [latest opinion polling](#) shows a rise in the number of Italians who believe coronavirus is a threat for them personally (up from 29% to 34%),

And in Canada, [three-quarters \(74%\) say the pandemic has changed their vacation plans](#), with only 24% saying they would feel comfortable taking a plane for vacation and 86% saying that they will stay closer to home than usual this summer.

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IPSOS WEBINARS ON CORONAVIRUS

Our range of webinars on coronavirus are designed to help our clients gain greater clarity on the pandemic. Visit our [dedicated page](#) of upcoming webinars and catch up on previous recordings.

Recent webinars include [APAC Digital Doctor 2020](#), presenting the findings from a 9-country study exploring doctors' attitudes and behaviours when it comes to digital health and connected health solutions in APAC.

In the latest webinar from our team in Canada, [The Path Forward: Understanding emerging consumer behaviours](#), we hear about new findings from a number of recent studies exploring key shifts in consumer behaviour as a result of COVID-19, and attempt to predict which behaviours are likely to 'stick' as we emerge from isolation.

Finally, as streaming entertainment has become an even greater part of our lives and shared experience during the crisis, what does this mean for new OTT services entering the market? Our webinar, [TV Streaming Wards Post COVID: The Marketplace & New Entrants](#), provides fresh insights into the streaming landscape including brand perception, drivers, and choice.

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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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