

# THE ROLE OF RESEARCH AND INSIGHTS IN COVID-19 TIMES

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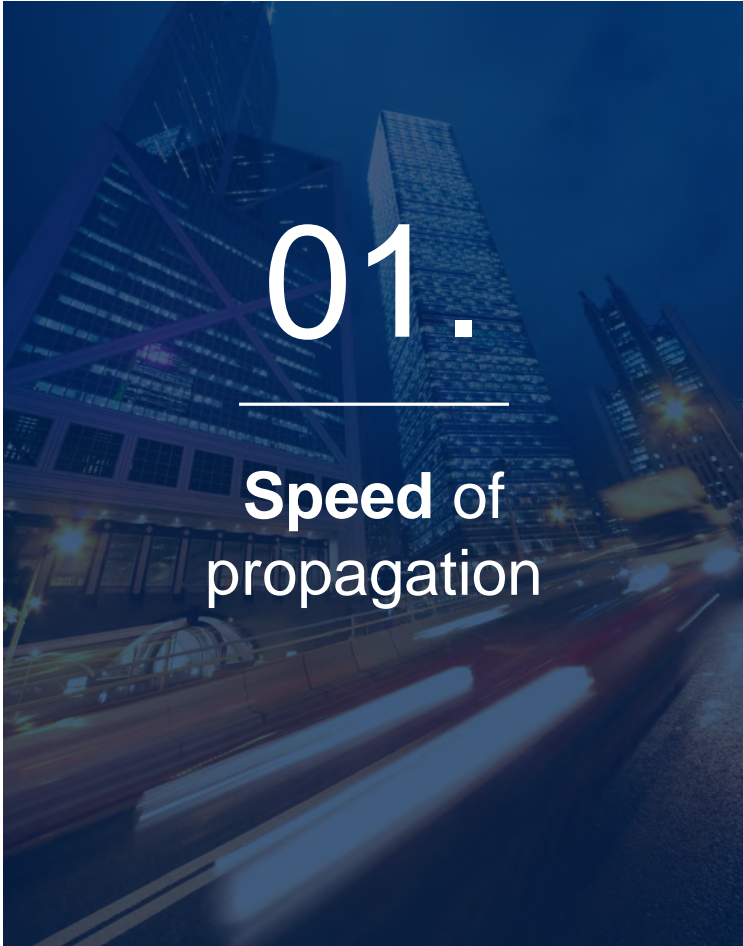
**President & Chief Client Officer, US**

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# The COVID-19 crisis is unprecedented on multiple levels



# The world has radically changed in the last 2 months

February 28 <sup>th</sup>	World	US	Canada
Confirmed Cases	83,652	67	11
Deaths	2,858	0	0

April 28 <sup>th</sup>	World	US	Canada
Confirmed Cases	3,121,118	1,029,317	49,815
Deaths	216,508	58,583	2,852

Source: Worldometer





# COVID-19 impacts a wide range of behaviors



## Thriving in a Bubble

- Focus on well being
- Learning new things
- Cooking at home
- Home cleaning



## New Home Workplace

- Collaboration tools
- Home schooling
- Blurred living



## Personal Health

- Tele-medicine
- Immunity enhancement
- No touch retail and payments



## Travel and Life Outdoors

- Virtual everything: travel, events, performances etc...



## Playtime in Fortress Home

- Entertainment hubs
- Increased screen time



## Connecting Meaningfully

- Increase in “we” time
- Virtual interactions with loved ones



## Revolution of Choice

- Supply restrictions leading to increase in trial opportunities



## New Value Equation

- Controlled spending

# These changes are impacting a large proportion of Americans

For each of the statements below, indicate your level of agreement. Total Agree Summary:

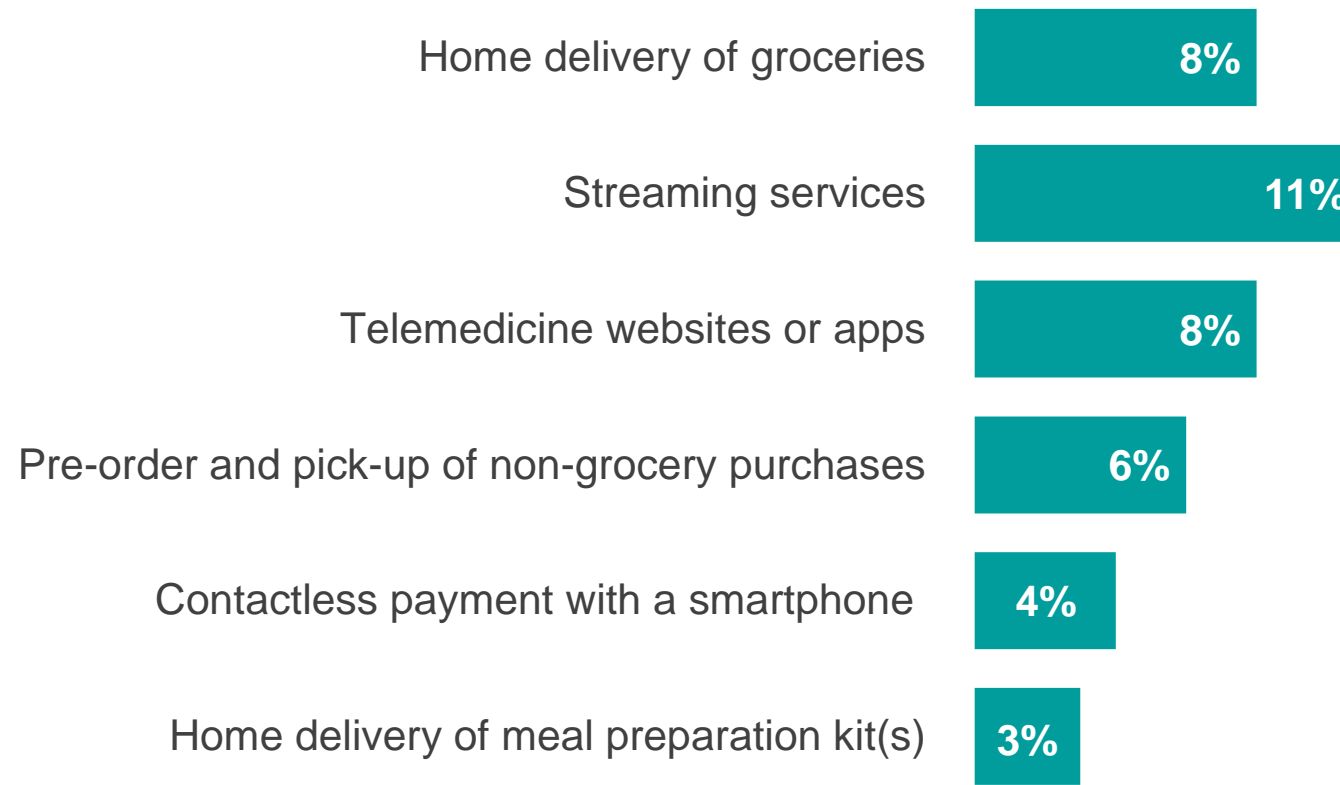


Source: Ipsos Poll April 22



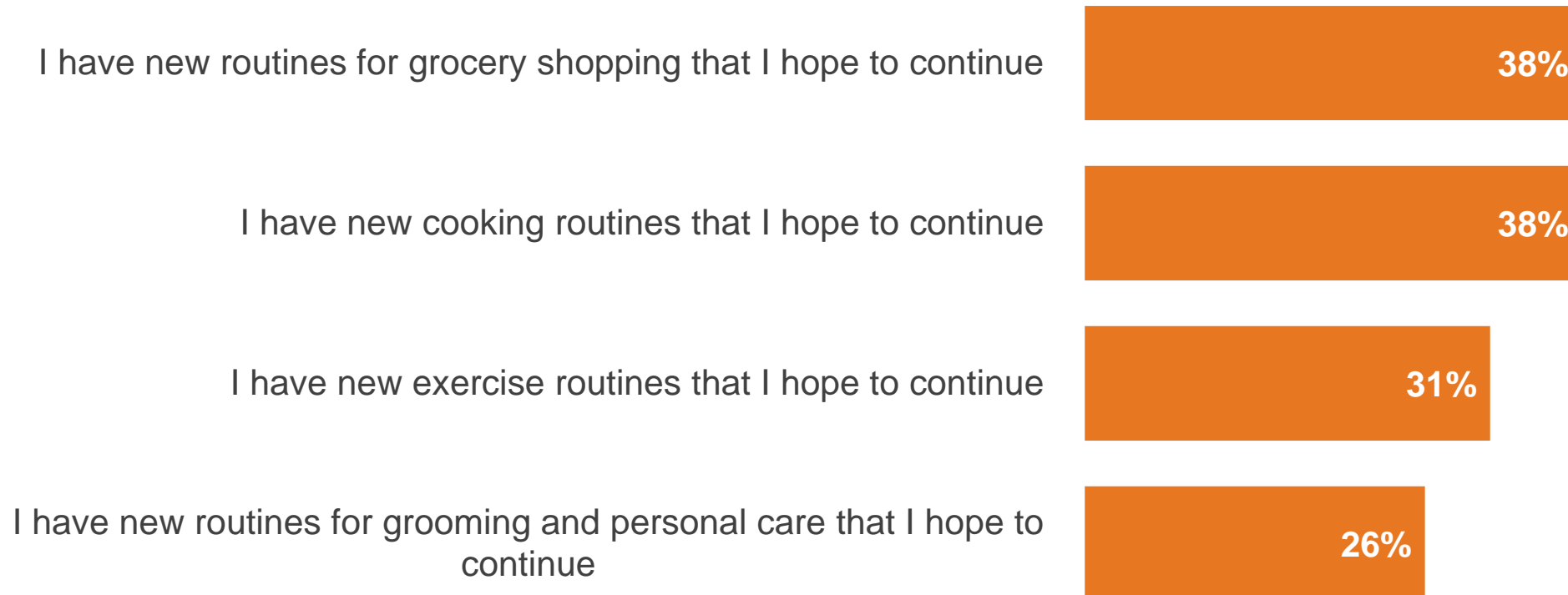
# And are leading to **unprecedented levels** of trial

*Since the COVID-19 crisis began, have you used a brand, product, service or feature that you had never used before in the following areas?*



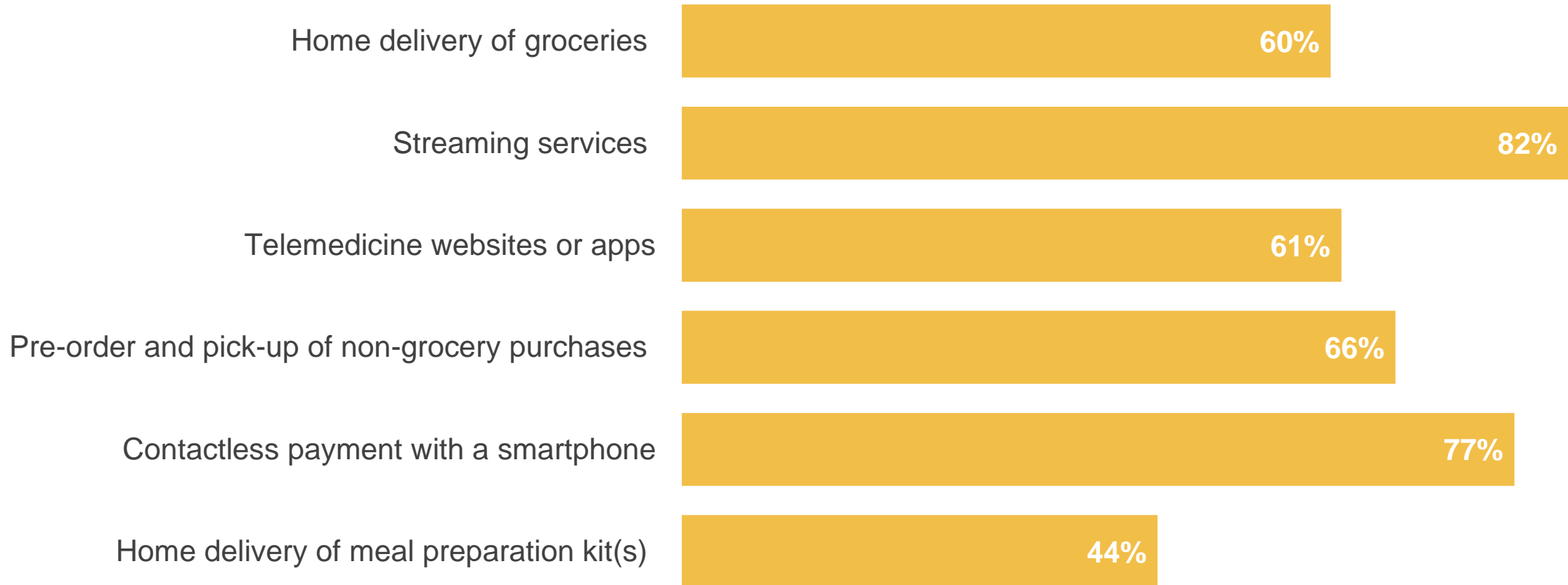
# Some of these behaviors may stick post COVID 19

*Thinking about your habits and routines now, to what extent do you agree or disagree with the following statements? Total Agree summary:*



# Some categories and **brands may benefit** beyond the crisis

*Select the categories where you expect to continue using the new brands, products, services or features you have tried ?*





# Are we going back to “normal”?

A majority of Americans:



Expect pandemic conditions to last



Will be nervous to leave their homes, even if businesses reopen



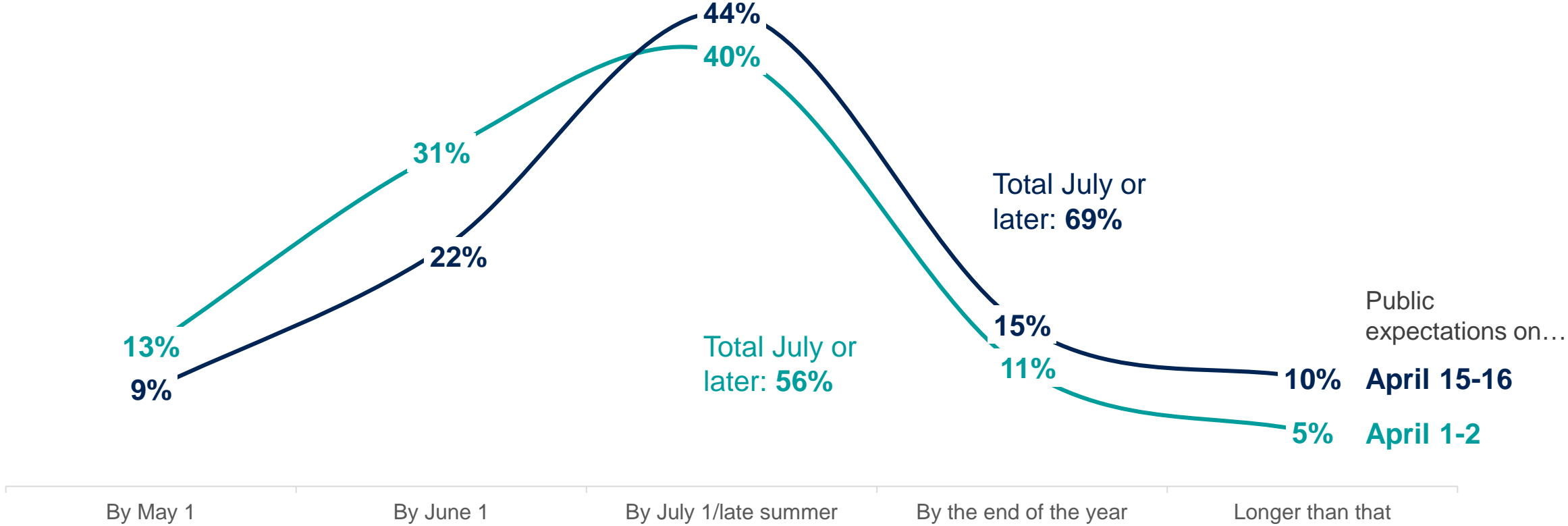
Are unlikely to swiftly return to public spaces when restrictions are lifted



# We expect pandemic conditions to last

When do you think you will be able to resume your regular daily routine?

Base: Changed regular routine because of coronavirus outbreak (~90%)

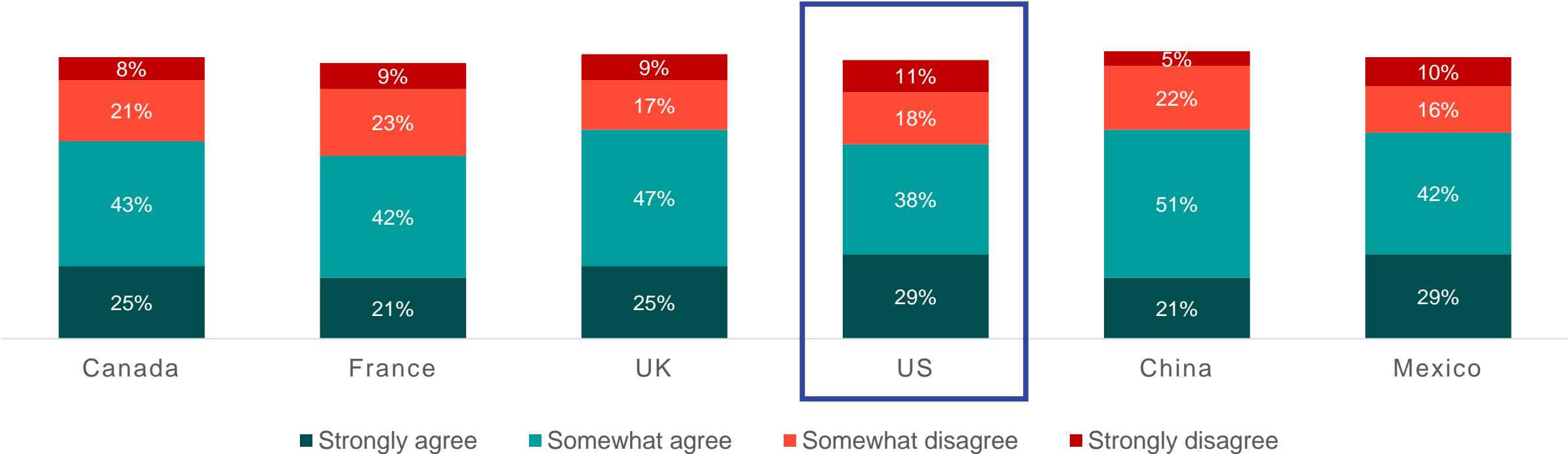


Source: Ipsos Polls April 2020



# Two in three agree they will still be nervous to leave their home, even if businesses are allowed to re-open

*Even if businesses are allowed to reopen and travel resumes, I am going to be very nervous about leaving my home*

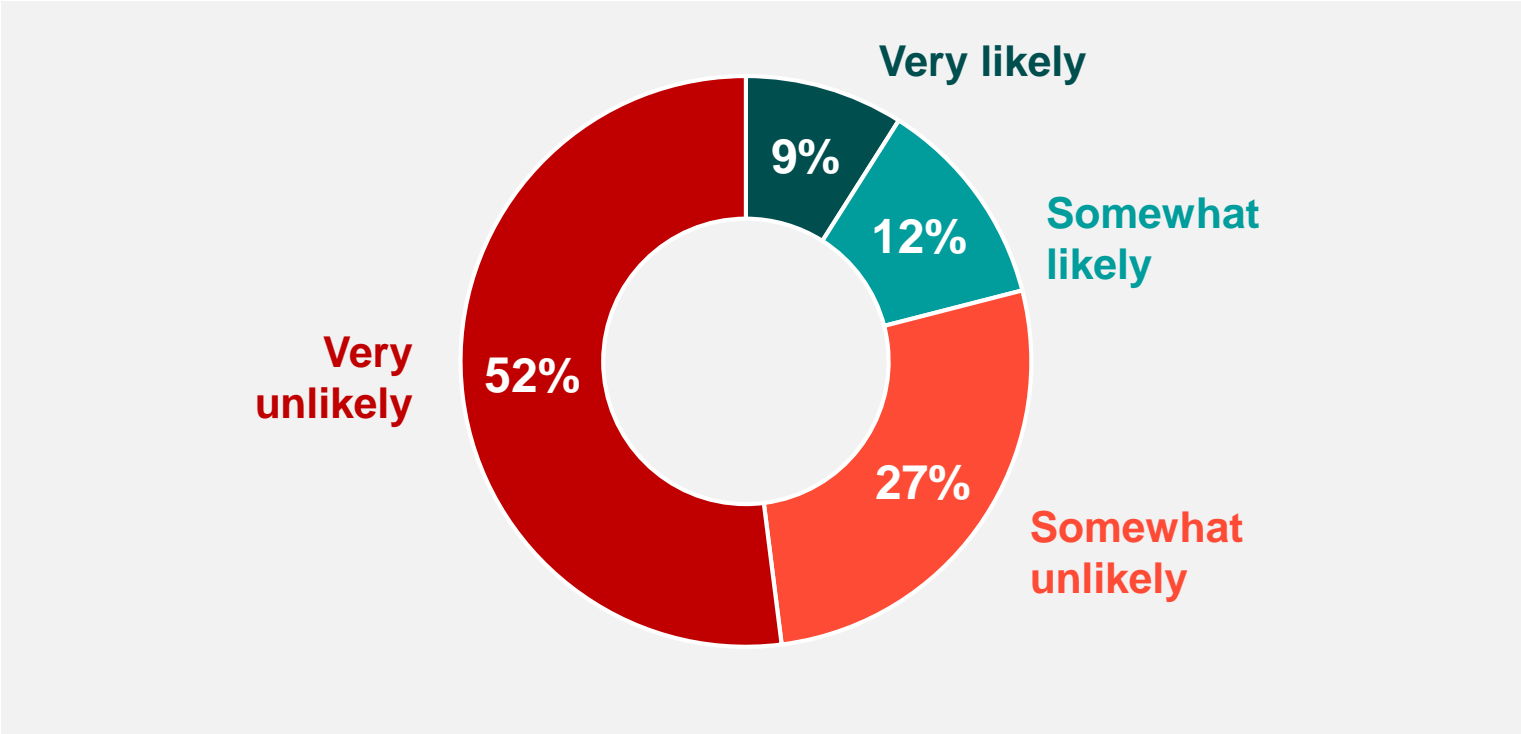


Source: Ipsos Poll April 16-19 (No Trend)



# Three in four are unlikely to swiftly return to public spaces if restrictions are lifted

*If restrictions were lifted tomorrow, how likely would you be to go to social public spaces?*

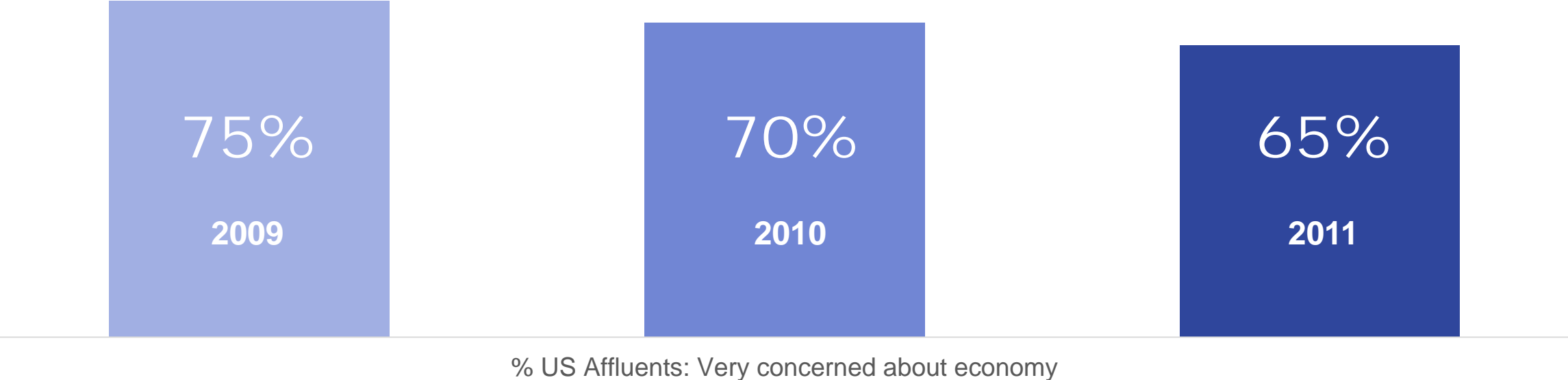


Q4. If restrictions on public activity were lifted tomorrow, how likely would you be to go out to public places such as restaurants, movie theaters, churches, and sporting events?  
ABC News/Ipsos Poll, April 22–23, 2020 (n=506)



# As seen in the 2008 Great Recession, such anxieties can persist for years

## Concern about the economy following the 2008 Great Recession



Source: Ipsos US Affluent Survey



# How can research and insights help?



# Three critical COVID-19 questions for research and insights professionals

1

How do I “virus proof” my products and services?

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**Must Win Battle:**  
Product/Service availability  
Portfolio management  
Digital channel performance  
Virus proofing face to face experiences  
Competitive benchmarking

2

How do I ensure my brand engages consumers with the right tone and purpose for the times?

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**Must Win Battle:**  
Pivoting brand strategy and messaging nimbly and effectively as the crisis unfolds

3

How do I identify which new behaviors will stick?

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**Must Win Battle:**  
Empathy, understanding, & speed:  
Being the first to capture new business opportunities



1 | **How do I “virus proof” my products and services?**



# Winning in e-commerce has never been more important

## Relevant research to e-commerce success

### Ecommerce readiness



- Optimizing layout & journey
- Performance of innovation and assortment

### Media mix & spend optimization



- Targeting consumers in-home
- Pushing channels that drive e-commerce
- Evaluating pricing and promotional tactics

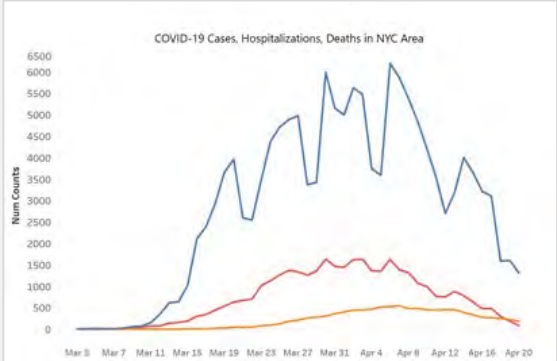
### Fulfillment performance



- Accuracy & speed of delivery / BOPIS
- Respect of health guidelines
- Customer service surge performance

# Data integration and real time analytics will help manage the reopening of brick and mortar America and its adjustment to new behaviors

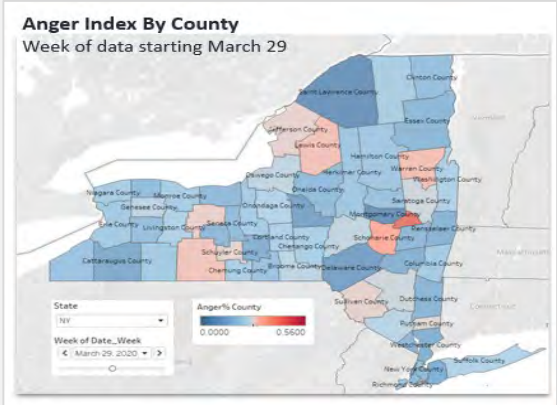
## Covid statistics



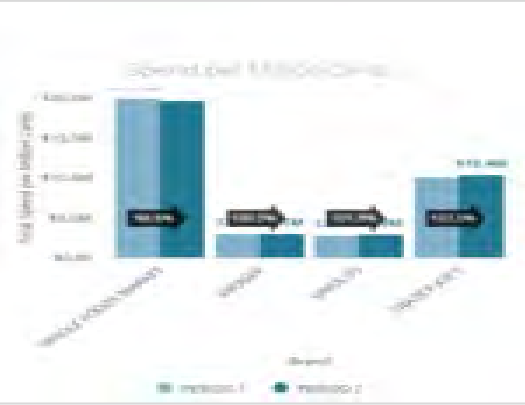
## Geo-mobility data



## Social sentiments



## \$ transactions by merchant



## Implications for:

- Phased reopening
- In store staffing
- Supply chain management
- Geo targeting
- New offer roll out
- ...

# Upon re-opening, brick and mortar businesses will need to meet new CX standards

Retailers can create a safe, “consumer-confident” environment.

### Best practices include:

- Redesign of touchpoints to include new cautiousness around “touch”, “proximity” and “personal interaction”
- Leverage behavioral science principles to nudge and signal safety
- Continuously monitor the impact of measures on customers and staff



58%

Of people feel that grocery stores have a responsibility to combat the spread of COVID-19.<sup>1</sup>



<sup>1</sup>. Source: Ipsos POV | IIS | N-1000 Gen Pop



# How can research help manage the 6-feet apart economy?

## Occupancy Checks

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Monitor traffic and manage site capacity levels

## Signage & Markers

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Audit signage, placement markers, plexiglass installations...

## Social Distancing

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Assess if in-store **social distancing guidelines** are clear and frequent

## Reception

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Capture pulse for how new social distancing & sanitization measures are being **received by customers**

## Sanitization

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Measure availability of **hand sanitizer and wipes**

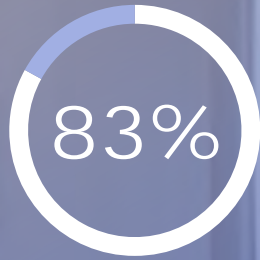
## Employee Engagement

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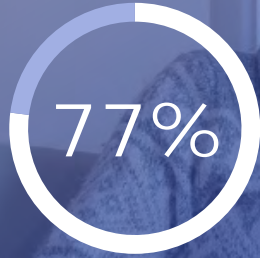
Understand **how associates are interacting** with customers while following social distancing protocol



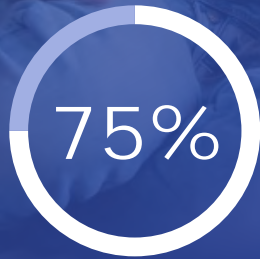
**2 | How do I ensure my brand engages consumers with the right tone and purpose for the times?**



" I want to hear from helpful brands"



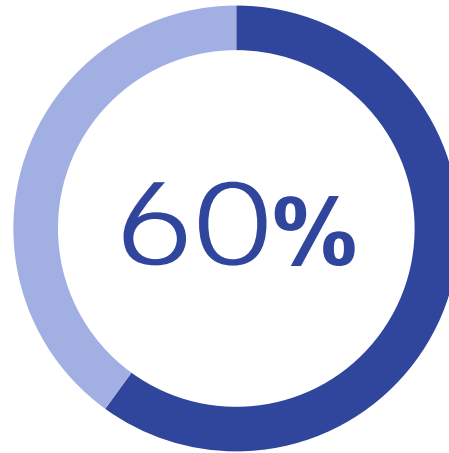
"I am interested in hearing from brands that can help me navigate the crisis"



"Companies have a social responsibility to offer aid during the Coronavirus"

Base: 999 Adults 18-55

## Consumers still want to hear from you, but many COVID-19 communications are not hitting the mark



of COVID-19 response ads we tested failed to meet airing standards on brand saliency and emotional connection

# What do consumers consider helpful and supportive from advertisers?

## Action-oriented, Informative Help

“**Too many emails to show ‘concern’ but nothing useful.** Some emails explain how the companies are going to continue working or not, that's helpful.”

## Being Part of the Solution

“Be honest and real and just do what you can. **We are all in this together.** I know businesses are freaking out but they need to trust that customers will return.”

“**Be HONEST about what you are doing to keep things going** for your products and most important **PROTECT** your employees”

## Speaking to Social Support

“I want to hear about brands’ philanthropic effort, especially large brands. **Give back. This is when your loyal customers need you the most.**”

“Want to know they are adapting to the changes and **keeping in mind both customers’ and employees’ safety first.**”



# Tone matters: Consumers want to feel OPTIMISTIC AND SAFE from advertising



## Security - 37%

People want to feel safe and secure again. They want to be reassured that things will return to normal. There is no need to be afraid or to panic.



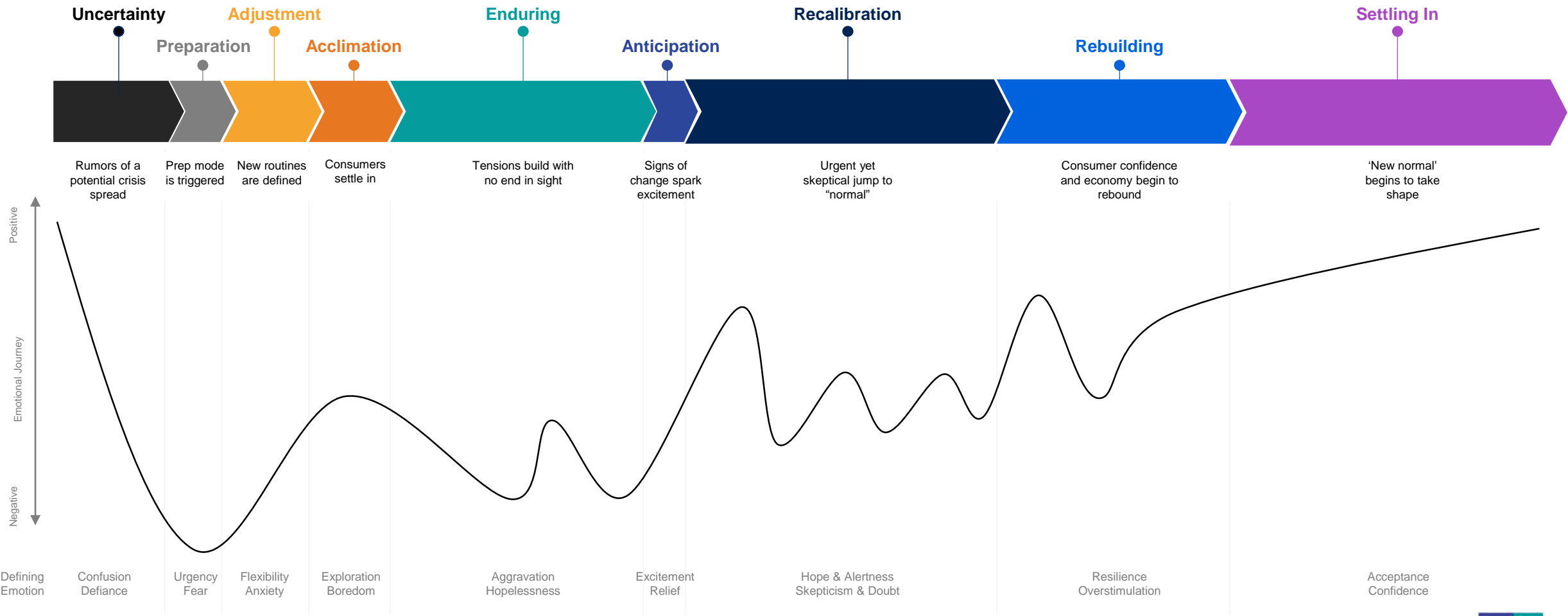
## Positivity - 30%

They want to feel good again and improve their well-being. They want to feel calm, comforted, relaxed, hopeful, positive and optimistic.



# Understanding the COVID-19 emotional journey can help anticipate what comes next and the roles brands can play

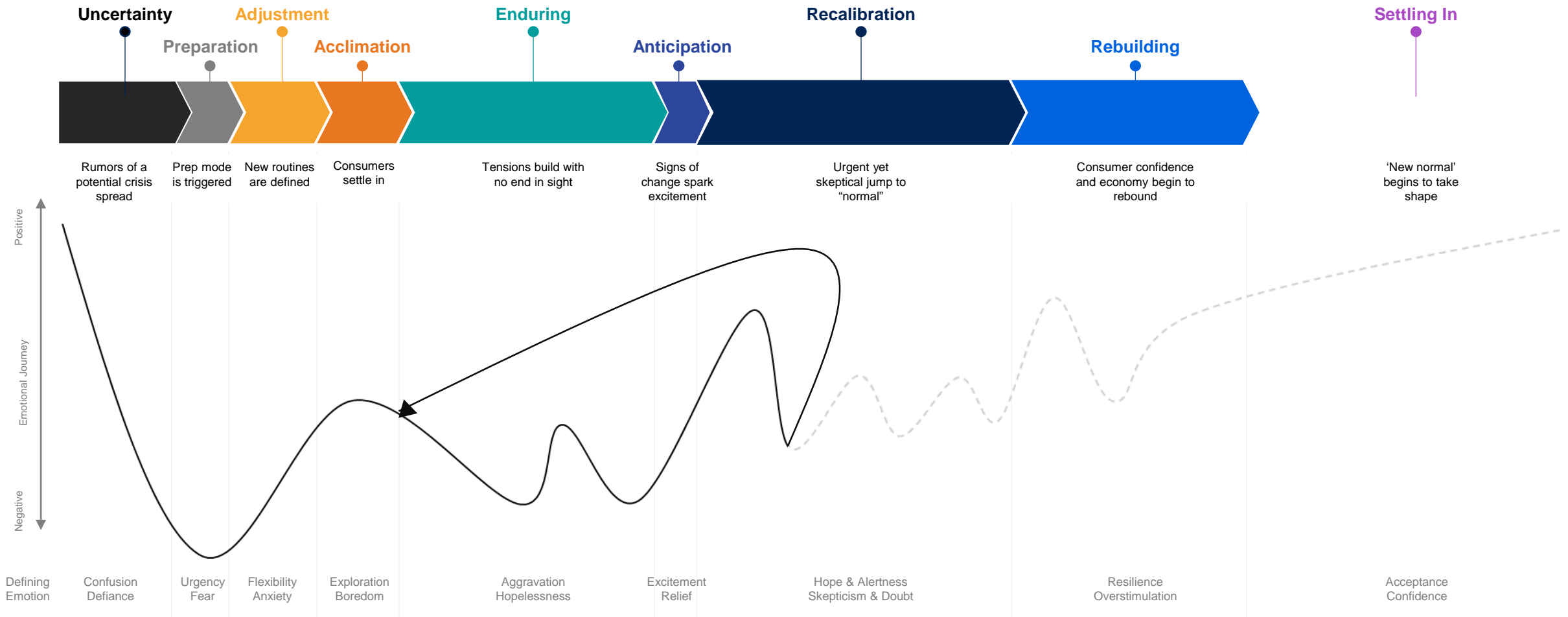
ILLUSTRATIVE  
EXAMPLE





# Even more so as recovery may not be linear

ILLUSTRATIVE  
EXAMPLE



# Best practices for communicating in COVID times



## Be active

consumers want to hear from brands still.



## Creative is King

Allow this opportunity to fuel creativity



## Context is Queen

Understand current contextual nuances



## Be prepared for fluidity

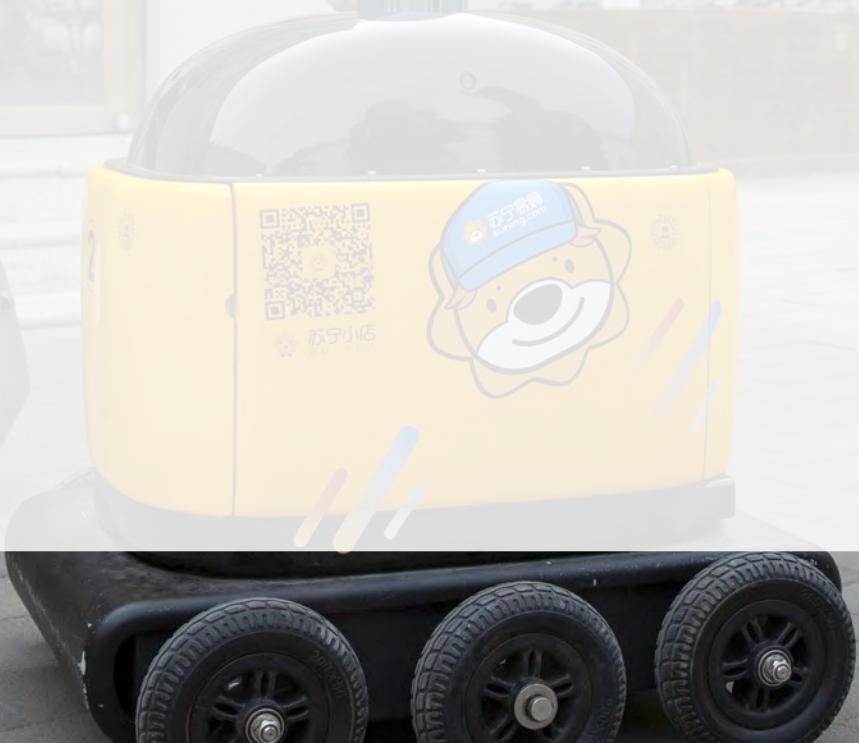
as the situation evolves



## Opportunity for innovation

as you can tap into consumers evolving behaviors, new priorities, and changing values

### 3 | How do I identify which new behaviors will stick?



# We have seen in China that with change comes opportunity

Restrictions in China were cushioned by strong support from digital platforms, cashless payment and efficient delivery of products and services:

1

**Consumers are now driven by new needs not just wants**

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Behavioral modifications based on sudden new needs will require new solutions

2

**Quick service adaptations can lead to new users and reinforced loyalty among existing customers**

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Think about new modes of connection or new service delivery options

3

**New behaviors can become habit**

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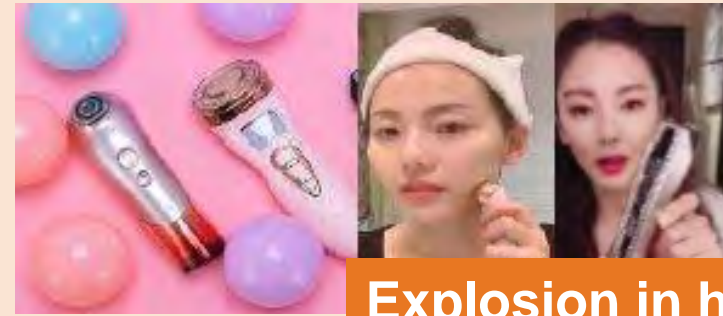
When life returns to normal, new behaviors adopted during the crisis are unlikely to revert or go away completely



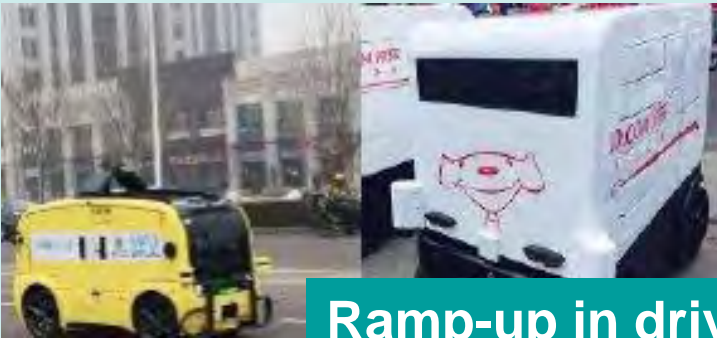
# Some examples



Beauty brands stretching to skin protective sanitizing products



Explosion in high tech beauty products



Ramp-up in driverless delivery technologies



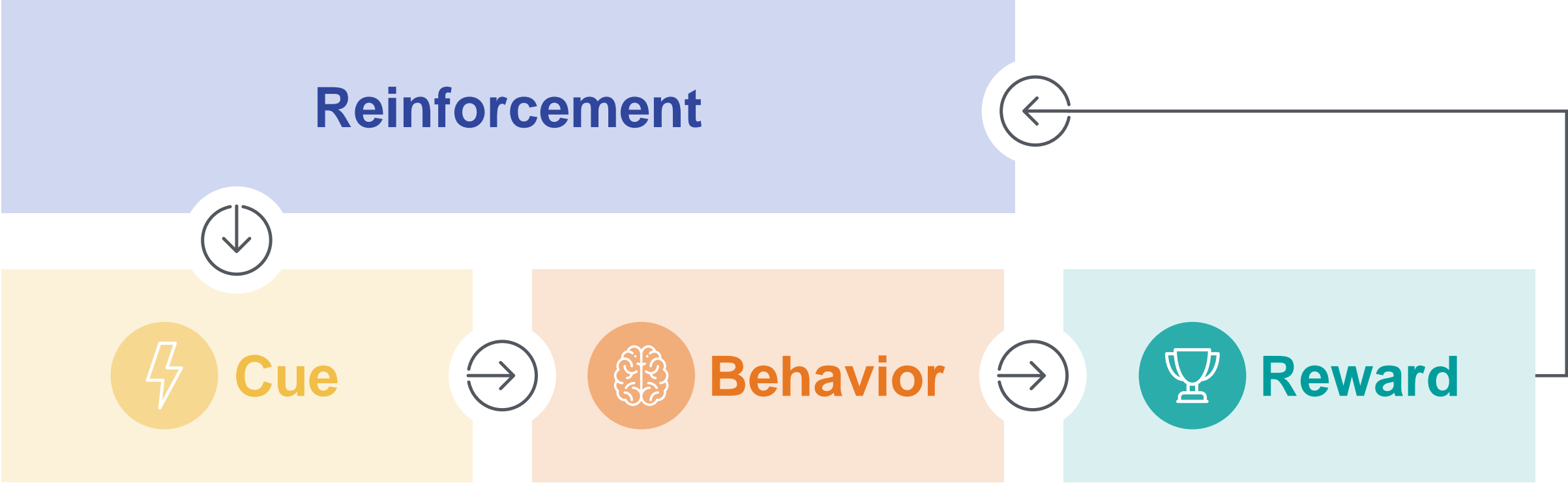
Increased usage in online medical services

COVID 19 will change all of us.  
The key is to understand and  
analyze **the human insight**  
**behind these changes,**  
and which of them will stick



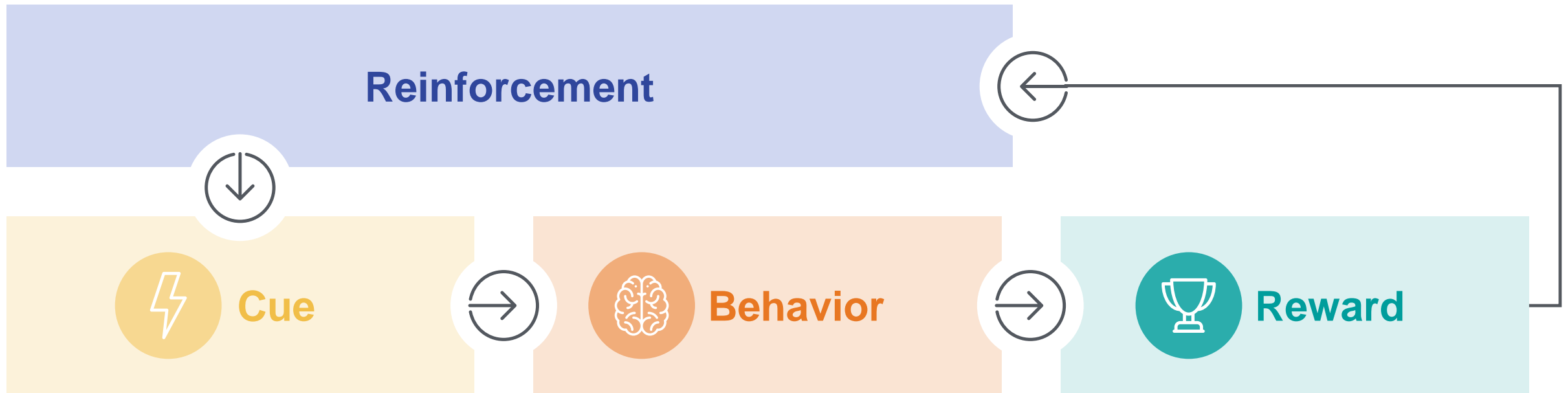
# How do we think about current habits, new behaviors and future stickiness?

Learnings from Behavioral Science Theory



# Nail Care Example:

More people are doing nails at home – will home-care last?



1. Nail chipping off
2. *Certain TV show*
3. *Friday night*
4. *Before girls' night*
5. *Boredom / Anxious*

1. Place/Product Availability
2. Knowledge
3. Effort
4. Financial
5. Emotions

1. Functional
2. Social
3. Emotional
4. Cognitive
5. Sensory



# What can brands do to influence stickiness?



**Identify** new potentially durable routines that are not yet ritualized.



Drive **internalization** of enjoyable new habits that meet a need and are easy to perform.

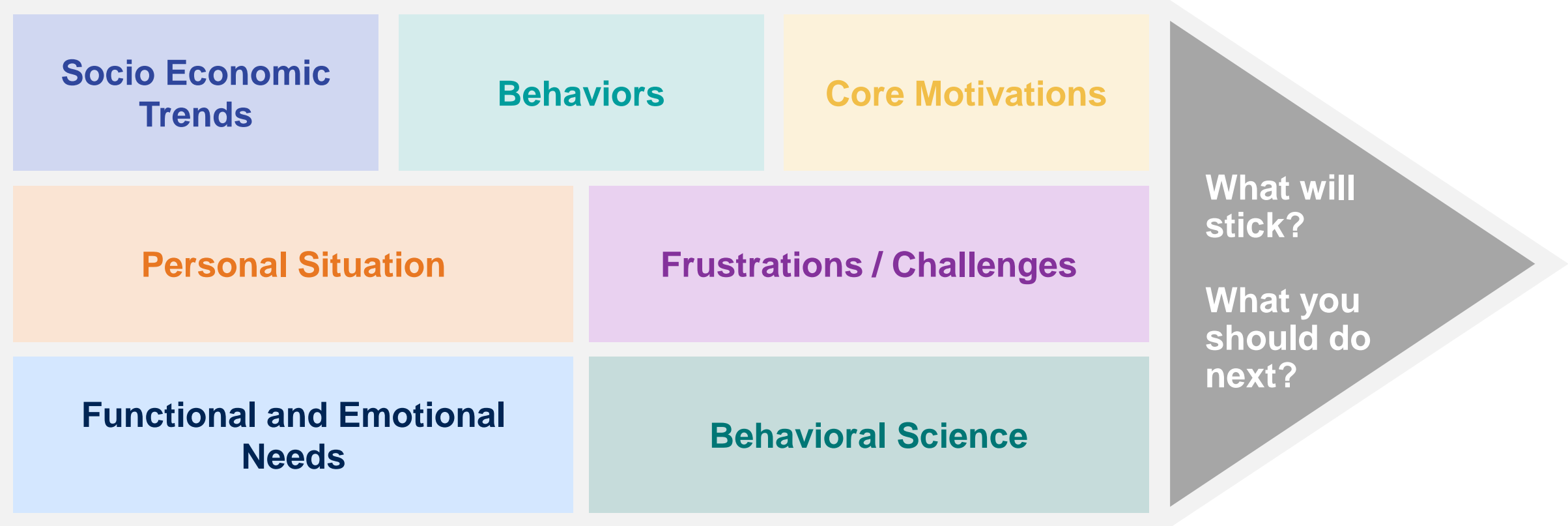
- Building benefit associations
- Building consumers' confidence in their mastery of it



Illustrate a sense of **shared experience or consensus behavior**.

- At a time when many are craving interaction, brands seeming to be facilitating personal connections stand to gain long-term equity.

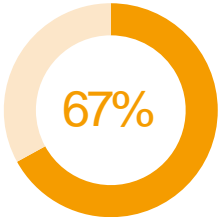
# A framework for identifying 'what will stick' and how your brand can emerge in a strong(er) position



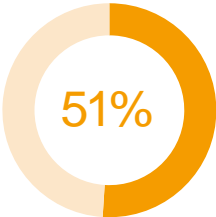
# Example: People are eating and cooking more at home, some of whom will continue that behavior and others will return to 'usual'

## PEOPLE ARE USING TIME AT HOME PRODUCTIVELY

Taking Advantage of Time At Home



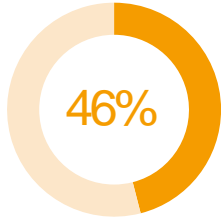
67%



51%

Trying To Eat Healthier

Are Exploring New Things



46%

## EATING, COOKING, AND SHOPPING HAVE CHANGED

53%

Report that they are **Cooking From Scratch More**

### ACTIVITIES PEOPLE ARE DOING MORE THAN BEFORE



## TRADITIONAL ROUTINES ARE MISSED

Thinking about the services and activities that are more restricted, **which of activities do you miss most right now?**



RESTAURANTS  
61%



GROCERY STORES  
28%

## BUT SOME WILL DELAY RETURNING TO PAST HABITS

When COVID-19-related closures and restrictions end, **how will you proceed in using these services?**

### % WILL RETURN RIGHT AWAY



RESTAURANTS  
36%



GROCERY STORES  
57%

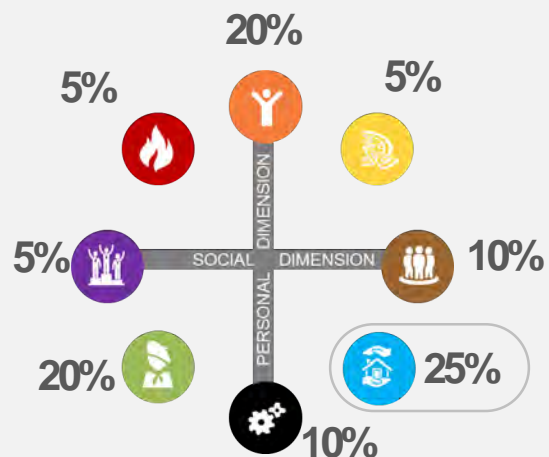
# Change In Focus: Cooking at Home for Security

**SANITIZED DATA & ILLUSTRATIVE EXAMPLE**

**53%**

Report that they are **Cooking From Scratch More**

## FOCUS ON SECURITY MOTIVATION



## SOCIO-ECONOMIC

- Unemployment Up
- Consumer sentiment down
- Social distancing in-place
- Believe recover will take a long time

## NEEDS

- Familiarity brings comfort
- Reliable recipes please family ... tho they can tire of them
- Value for the money
- Use what I have on hand
- Entertain the family

## BEHAVIORS

- Cooking old favorites
- Stock up, cook for leftovers
- Look for deals / coupons
- Using ingredients across recipes
- Baking/ cooking to fill time

## WHAT'S CHANGED

People are cooking at home more to stay healthy, limit interactions, and stay within a budget driven by lowered HH income.

They are primarily cooking meals they know and are comfortable making. They have stocked up on shelf stable foods and are eating them more often than before. They started switching to more Store Brands across some categories. But have not shifted a significant amount of purchases online (yet).

## WILL IT STICK: OUR BESCI PERSPECTIVE

Behaviors that have sustainable Cues and Rewards as well as the ones with less behavioral barriers are likely to stick post-pandemic.

### Cues:

- *Psychological* – Boredom and Anxiety
- *Social* – Something engaging to do with kids

### Behavioral barriers:

- *Knowledge* – Initially not having cooking ability (this barrier will be reduced as they gain more experience).
- *Effort* – it takes more effort to cook and clean

### Rewards (positive or negative):

- *Functional* – Food not turning out great
- *Emotional* – Sense of accomplishment, and feeling proud to feeding loved ones



# In summary



# The role of research and insights has never been more important to organizations

1

We are witnessing a **fundamental shift in** people's attitudes, aspirations & behaviors

2

Pre COVID-19 data (however "Big") is **less relevant**

3

**Re-learning consumer choices and behaviors** will be a key competitive advantage

# COVID-19 Research & Insights Check List

1

Virus proof physical touchpoints

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2

Enhance digital offer and channel performance

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3

Track COVID 19 stages at granular / location level

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4

Monitor emotions and continuously reassess communications

---

5

Investigate which behaviors may stick post COVID

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6

Identify ways for your brand to reinforce or leverage these new behaviors

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The time to research is now





**Any questions?**

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**BE  
SURE.  
MOVE  
FASTER.**

**GAME CHANGERS**





**THANK  
YOU**

**GAME CHANGERS**

