

SIGNALS



Understanding the
coronavirus crisis

Third Edition

April 2020

INTRODUCTION – SIGNALS EDITION #3

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 third 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 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

Self-isolation is now well-accepted across the world

Our latest public opinion poll across 15 countries finds most of us are staying at home to stop the spread of coronavirus, showing that the strategy of self-isolation has become well-accepted.

IPSOS GLOBAL TRENDS 2020

COVID-19 signals

With the advent of COVID-19, people, governments and organisations are focused on immediate survival measures. We identify early signals from the current experience which could in turn influence longer-term change.

THE CREATIVE FIGHTBACK

How brands can help people to win the war

We explore what people need and expect of brands and their campaigns right now, while outlining the actions brands may need to take to secure their long-term survival once the crisis is over.

STAYING CLOSE TO YOUR CUSTOMERS

Customer-brand contact amid social distancing

Many consumer behaviours are derived from carrying out familiar activities on a routine basis. In this paper, we set out the steps likely to be involved in building strong customer relationships during times of disruption.

BRAND GROWTH IN TIMES OF CRISIS

We revisit the 'golden rules' of brand-building

Our new paper looks at approaches to brand growth in the context of COVID-19 to help businesses orientate themselves both today and as they look towards the post-crisis world.

SPOTLIGHT ON THE US

Americans adapt to life in the face of coronavirus

American work and life is changing dramatically because of coronavirus, with the vast majority now self-quarantining. We examine how Americans are adjusting to the new reality.

SPOTLIGHT ON SPAIN

Analysis from Europe's worst-hit country

We present our latest analysis from Spain, which now has Europe's highest number of coronavirus cases, including findings from our ongoing exploration into how Spaniards are responding to isolation.

SPOTLIGHT ON CHINA

Reflecting on the last three months

As China begins to look ahead, we reflect on the emerging lessons from the recent period via three new reports, each looking in detail at the experience of a particular category – coffee, dairy and healthcare.

PUBLIC OPINION AND CORONAVIRUS

Our latest public opinion poll finds most of us are staying at home to stop the spread of coronavirus.

The majority of people in all except one of the 15 countries surveyed in our latest public opinion poll say they are self-isolating or quarantining at home to stop the spread of COVID-19. Japan is the only exception to this, with just 15% of respondents saying they are staying home to fight the pandemic.

Countries in which at least four in five people now report they are self-isolating include Spain (95%), Vietnam (94%), France (90%), Brazil (89%), Mexico (88%), Russia (85%), the US and India (both 84%). The peak for reported self-isolation was reached two weeks ago in about half the countries surveyed, and there has been little movement since.

The country with the biggest increase in self-isolation is Russia (+23 points), followed by Vietnam (+16), Australia (+11), and Mexico (+8). Overall, the data shows the strategy of self-isolation has become well-accepted by populations in most of the countries surveyed. Not only are governments implementing the measures, but their citizens are mostly complying and staying home.

When will it all end? The proportion expecting things to return to normal by June ranges from 19% in Japan and 27% in UK, through to 92% in Vietnam, 85% in Brazil and 84% in Mexico.

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IPSOS GLOBAL TRENDS 2020

We identify early signals from the current experience which could influence longer-term change.

Our Global Trends work is based on a theory of change in which macro forces usually impact slowly on human beliefs, trends and signals. Those groups of signals then gradually influence trends and even macro forces over a longer time frame.

Sudden shocks to the system – like COVID-19 – cause immediate seismic shifts in everyday life, creating new signals which can accelerate change and disrupt our norms. These signals may be examples of people becoming more heavily entrenched in the values they hold. When shocks occur, people look for ways to reinforce what they already think, or that they want to believe to be true.

The interesting question posed by COVID-19 is how the signals we are seeing now might influence longer-term change. For example, citizens could re-evaluate their relationship with the wider economy and support extending employment rights to the “gig economy” workers. Americans may demand better state-supported healthcare. Globally, we may re-appraise how much we need offices, after working remotely for so long.

We will be collecting and monitoring the COVID-19 signals and presenting our analysis on these topics in the coming weeks.

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THE CREATIVE FIGHTBACK

How brands can help people to win the war to survive, then revive.

The coronavirus pandemic, and the subsequent lockdown, has brought huge disruption to our daily lives and behaviour.

During this time, brands are unsure how to proceed. But they do have a vital role to play in the fight, and people expect them to step up and lead. Both in helping them on a day-to-day basis by adapting their products and services, as well as communicating broadly about how they will work with them to set a path to a better future.

We demonstrate this using our polling data with specific measures about what people need and expect of brands and their campaigns during a crisis.

We also measure the creative effects of campaigns that have already reacted to COVID-19, and share Ipsos' perspective from more than four decades' experience in branded communication research. In this paper, we outline the steps we think brands need to take to help win this war to protect our way of life, and their long-term survival once we overcome the crisis.

Brands and creative have always had economic and social value, and now the ideas and stories they tell may well make an important difference as we get through the present crisis.

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STAYING CLOSE TO YOUR CUSTOMERS

Why customer experience still matters amid COVID-19 and social distancing.

In stable times, many consumer behaviours come from carrying out familiar activities on a routine basis, such as a weekly supermarket shop. These familiar activities give consumers certainty and simplify decision-making. However, COVID-19 has disrupted these routines.

Consequently, customer priorities, attitudes and behaviours are changing. This gives brands an opportunity to provide reassurance that these uncertain times are navigable and, in so doing, strengthen their customer relationships. In this paper, we set out the three steps likely to be involved:

- **Understand:** Ascertain the influencing factors and understand the impact of the crisis on customers and brands.
- **Adapt:** Identify how to best refocus customer experience measurement and management to meet changing needs and reallocate resources to address what truly matters, in the most cost-effective way possible.
- **Anticipate:** Identify how customers are adapting to changing environments and how new needs and behaviours are formed, to evolve the customer-brand interactions and relationships for the future.

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BRAND GROWTH IN TIMES OF CRISIS

We revisit the 'golden rules' of brand-building in the context of COVID-19.

Ipsos' way of understanding how brands grow highlights the importance of context in consumer decision-making. The sudden escalation of measures to tackle the spread of COVID-19 ushered in unexpected circumstances, in turn influencing brand purchases.

While consumers face challenging times and are in a state of uncertainty, brands are also bracing themselves for a different landscape where the dynamics at play could fundamentally challenge the brand-building playbook. In this paper, we revisit conventional wisdom and present perspectives to help brands orientate themselves today and in the post-crisis world, such as:

- **Rational vs. emotional:** Should brands build further functional superiority and appeal?
- **Always be visible:** How 'present' should brands be – should they increase saliency?
- **Evolving the marketing mix:** Should brands use changing market effects to maximise sales?
- **Global vs. local:** Should brands still go GLOCAL?

This analysis is grounded in Ipsos' Brand Value Creator and Brand Mental Networks frameworks.

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SPOTLIGHT ON THE US

Americans adapt to life in the face of coronavirus.

American work and life is changing dramatically because of coronavirus. The latest wave of the Ipsos coronavirus tracker finds 84% of Americans are now self-isolating or quarantining at home.

But as in-person contact becomes more rare, people seem to be adjusting to the new reality. The latest [Axios-Ipsos Coronavirus Index](#) finds slower levels of change in social and work contexts after major shifts in March.

The number of Americans reporting being furloughed (19%), their employer shutting down (17%) or being laid off (11%) are mostly unchanged from last week. However, anxiety levels around coronavirus continue to climb, with 47% of working adults reporting that their ability to effectively do their jobs has become worse over the past few weeks.

Meanwhile, as coronavirus has spread across the US, so has fake news about the virus and how to stay safe. A new [Ipsos poll](#) conducted on behalf of *The Daily Beast* found that most Americans say they can sort truth from fiction on COVID-19.

By a nearly three-to-one margin, more Americans disagree than agree that getting people back to work is more important than social distancing. Here we observe some differences by party affiliation: 57% percent of Republicans disagree that getting people back to work is more important, a figure which rises to 83% of Democrats.

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SPOTLIGHT ON SPAIN

The view from Spain, which now has the greatest number of coronavirus cases in Europe.

Going into the lockdown, Spaniards marginally approved of their government's handling of the crisis while six in ten felt the measures taken weren't strong enough. Seven in ten also reported expecting the effects of COVID-19 to last longer than they had previously thought. Our [team's analysis](#) includes perceptions and behaviours of the Spanish public compared to other affected countries.

When it comes to coverage of the crisis, just over half of Spaniards trust TV, radio and newspaper coverage – well ahead of friends and family, the internet and social networks. The Ministry of Health scores higher, with 66% trusting it, while it is healthcare workers (with a 93% score) who are most trusted of all.

Our research finds people beginning to display some discomfort with confinement: as they adjust and become accustomed to the new environment, we see more uncertainty about what comes next. This uncertainty may in turn be having an impact on household expenditure, as 30% of consumers report spending less than they did last week.

Our [social media analysis](#) shows that mentions of COVID-19 itself peaked at the time when measures such as closing schools and social distancing were put into place across the country – despite the number of deaths continuing to rise. After this point, conversations turned more to the economic and social consequences of the epidemic.

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SPOTLIGHT ON CHINA

Three new reports reflecting on lessons learned.

China reported no coronavirus deaths on Tuesday 7th April, for the first time since it started publishing daily figures in January. The country is now starting to look ahead, even if the dynamics of the 'new normal' cannot yet be entirely clear. To reflect on the lessons learned from the recent period, Ipsos in China has published three new reports, each looking in detail at the experience of a particular category.

In [Coffee Insights](#), our research finds a spike in searches on Weibo around coffee stocks during the confinement period, with the absence of regular supply associated with a loss in security. Meanwhile, there was an increase in sales of coffee machines, powered by middle-class consumers searching to replicate their lost routine of drinking coffee when going about their daily lives.

The [Dairy: Impact and Outlook](#) report identifies opportunities for the sector to adapt to new consumer experiences. Confinement prompted many to take up home baking, and this was accompanied by a rise in demand for dairy products.

[Health and wellness](#) is the theme of our third report, with "Cherish Life" and "Enhance Immunity" identified as key themes. Our researchers describe a series of consumer behaviours which could have a longer term impact, such as encouraging the whole household to use a health-related product and an increased willingness to try something new - while acknowledging that it would not have been considered prior to the appearance of COVID-19.

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SHORTCUTS

CORONAVIRUS AND SOCIAL MEDIA

COVID-19 has undoubtedly upended millions, if not billions, of people's daily routines worldwide. Many people are experiencing the "work from home" or "study from home" aspect of the coronavirus pandemic in different ways.

Data from Synthesio, our social listening tool, shows that online mentions about working from home grew 96% over the last week as more offices temporarily closed. In this article, [*How coronavirus has shifted the way the world works*](#), we examine the dynamics of social conversations happening online to discover how employees, companies and students are handling such a quick transition to a different environment.

Meanwhile, the trend for sharing coronavirus memes and social media challenges on platforms including TikTok, Instagram and Twitter is growing. Many coronavirus memes have been inspired by global calls to self-quarantine, while others continue to remind us to wash our hands and avoid touching our faces. In [*this article*](#), we explore the use of humour as a coping mechanism when things look bleak, and explore what things are making people laugh online, and why.

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UPDATES FROM THE COUNTRIES

Our latest [*opinion polling in Italy*](#) shows that the level of perceived threat is beginning to plateau – 86% see COVID-19 as a threat to the world, while 52% perceive a threat to themselves personally.

Meanwhile, a [*new survey from Ipsos in the UK*](#) shows that the financial impact of coronavirus is already being felt by Britons, especially younger generations, with a quarter (25%) of those under 35 saying they have already needed to use their savings as a result of the crisis.

Following the European Union's announcement of the closure of the bloc's borders for 30 days, we share an assessment of what the crisis means for [*the future of economic activities between Vietnam and the EU*](#).

Sub-Saharan Africa saw its first case of coronavirus reported in Nigeria at the end of February, sparking intense online conversations in the region. [*Read our analysis*](#).

In **Chile**, our team are running a series of weekly webinars on coronavirus. The [*first one*](#) took place last week, presenting early learnings for marketers.

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LOCKDOWN TV VIEWING

As social distancing and self-quarantining become the 'new normal', people are spending more time at home with their entire families. For lots of people, that means more TV.

Unsurprisingly, streaming is up, with Netflix viewership hitting all-time highs. Premium cable and local TV is also up year-on-year. But as nationwide quarantines in the US took hold in March, Ipsos' Streaming 360 research showed a clear shift occurred. The things people said about what they are choosing to watch changed. Instead of people saying they watched something because it was a personal choice, many people talked about watching something because it's what the whole family was interested in — a shift from "me" to "we."

This craving for shared, communal viewing experiences is being felt by families, as well as those who live alone, and highlights the human desire to seek company and connection, especially during times of anxiety. This has given rise to "party viewing" and other solutions to co-view shows remotely during isolation.

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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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