

THE HUMAN EXPERIENCE OF LIVING THROUGH A PANDEMIC

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01.

How are People
Feeling?



02.

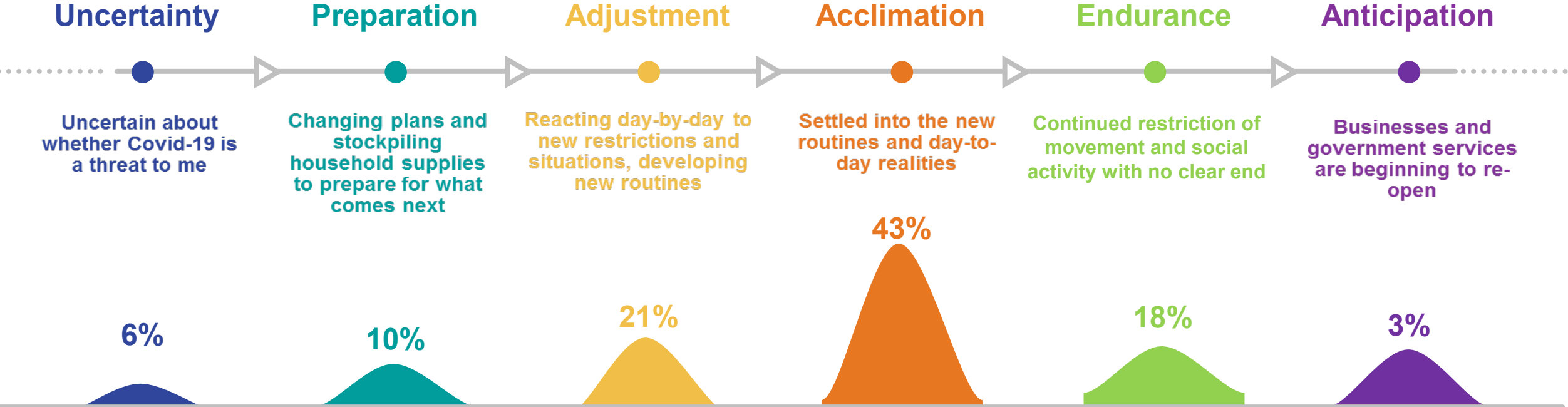
How are People's
Mindsets Impacting
Behaviors?



03.

What are Implications
for Brands?

Across the Globe, Consumers are on an Emotional Journey as the Pandemic Unfolds



Source: Verbatims from Global Ethnography Center of Excellence COVID-19 Research, April 2020
Source: Global COVID Tracking April 16-19, 28,000 Adults in 15 countries

This Especially Comes to Life When we Look at Memes Across Social

01.
Uncertainty

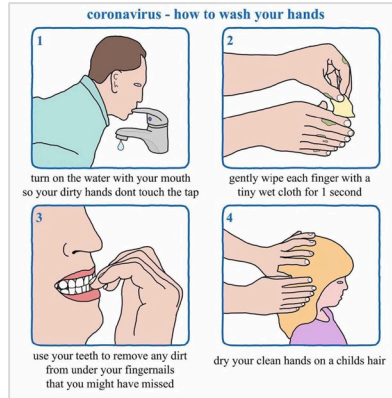
02.
Preparation

03.
Adjustment

04.
Acclimation

05.
Endurance

06.
Anticipation



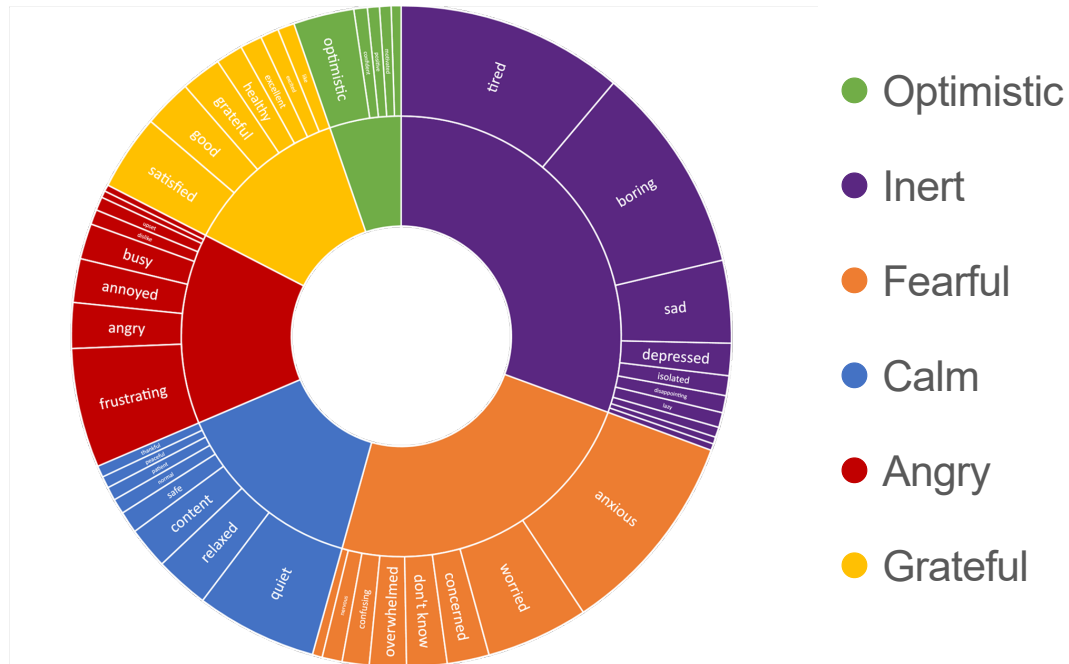
Time traveller: What year is it?
Me: It's 2020.
Time traveller: Oh. The first year of quarantine.
Me:



People Are Tired and Anxious, Living Through The Unknown...

How do you feel this week?

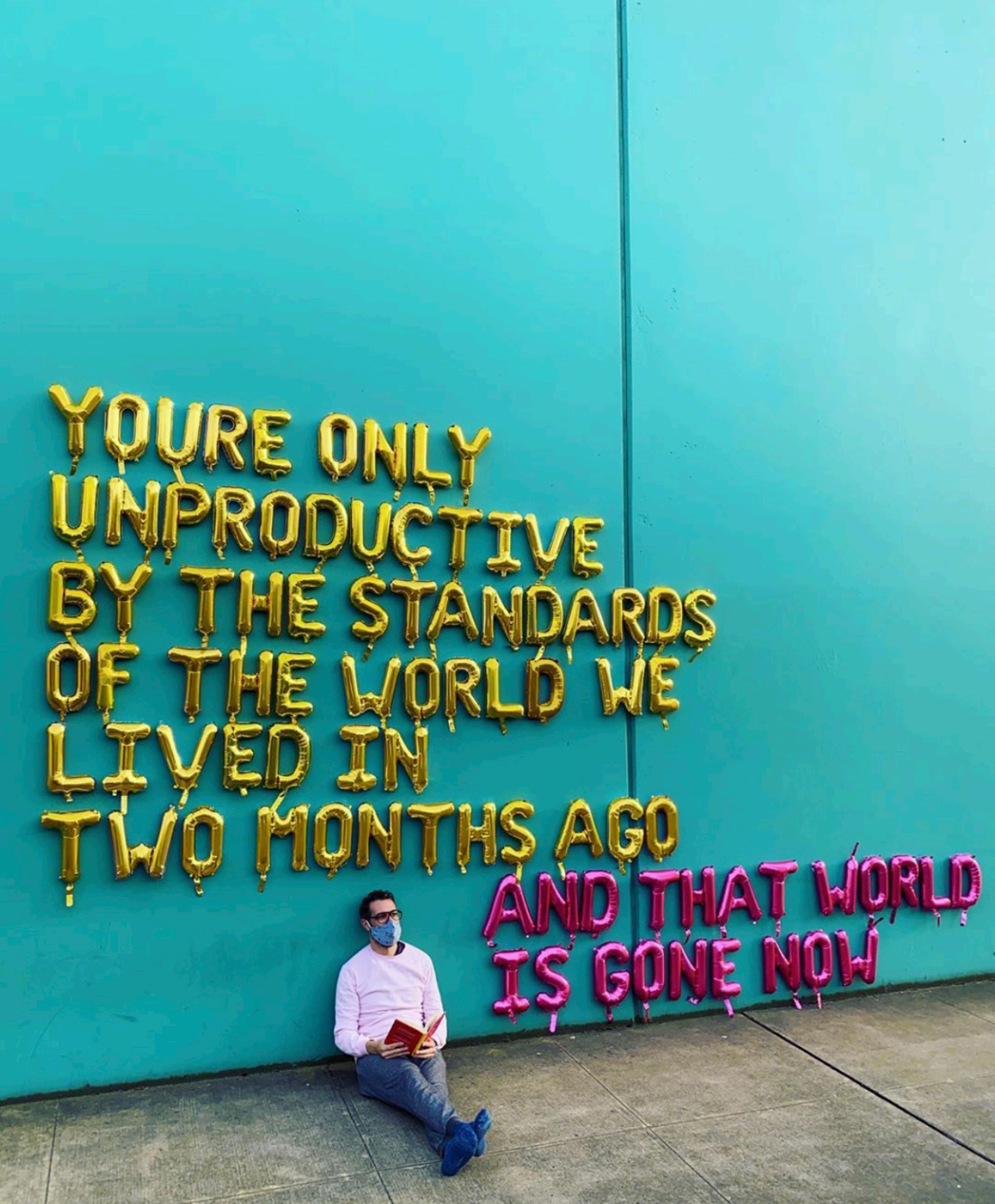
Share of buzz broken out via AI text analytics processing



**Note: Themes are not mutually exclusive as the respondents can express more than one theme. Counts are reportioned to illustrate relative share. Only mentions of 4% or greater included.

Source: Ipsos Online Communities – April 20, 2020 (N=652)

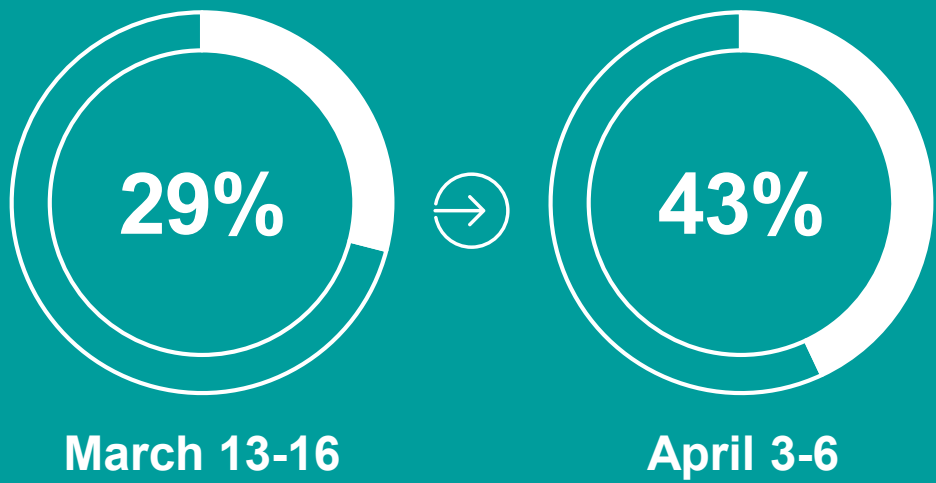




And Redefining Balance to Manage the Conflict Between Productivity and Survival

"It's painful feeling like we're all going through this together, but alone at the same time. It's also hard finding that new normal."

Emotional well being has gotten worse in the last week



Source: Axios/Ipsos Poll of 1,092 U.S. adults, March 13-16 and 1,355 U.S. adults, April 3-6, 2020



HOW ARE PEOPLE'S MINDSETS IMPACTING BEHAVIORS?

Understanding Consumer Mindset With Regulatory Fit

Promotion

How can I
achieve more?

What does the product
enable me to do?

How can I maximize
my learnings from this
conference?



Prevention

How can I prevent
the negative?

What does the product
protect me from?

How do I not miss out any
important information in
this conference?

Higgins, E. T. (2005). Value from regulatory fit. *Current Directions In Psychological Science*,

Pre-Covid... Consumer's Natural Tendencies

Promotion



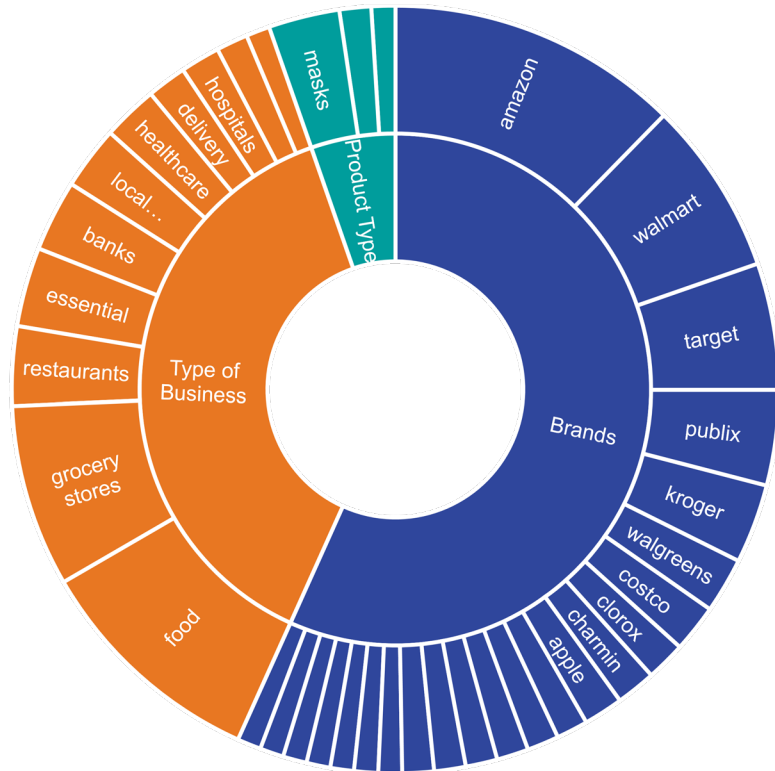
Prevention



Today, Brand Trust Is Linked To Survival...

Brands people trust right now

Share of buzz broken out via AI text analytics processing (n=397)



**Note: Themes are not mutually exclusive as the respondents can express more than one theme. Counts are reportioned to illustrate relative share. Only mentions of 4% or greater included.

“ Amazon and Walmart are still putting forth great effort to keep our lives as normal as possible.

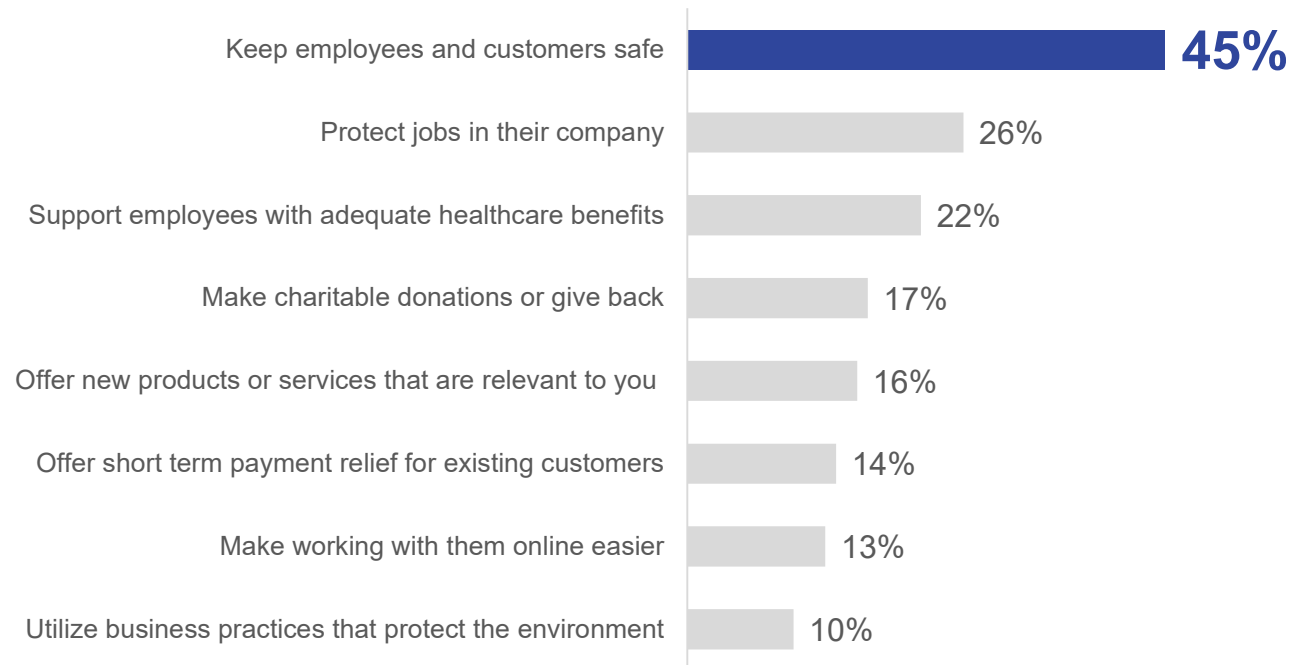
“ Walmart has been great for pick up and avoid people and lineups at their stores for now.

“ One brand I continue to trust is Target. Whenever I need something and want it same day, that's where I turn to over Amazon. I feel safe when I enter the store as well.

Source: Ipsos SMX Online Communities; COVID-19 Weekly Check In (April 23-24, 2020) Q: Thinking about brands and corporations, which ones do you feel you can trust most during these times?

...And Purchase Intent Is Most Influenced By Safety

Influence on Consumer's Decision to Purchase from a Brand Including mentions above 10% (n=1114)



"Take care of your employees."

Help in your surrounding areas. Show us what you are doing and we will support you when this all passes by. We can help each other."

- An Ipsos Community Member



Source: Marcom, 4/10-4/13, Commercial COVID-19 Tracker
Q. How much have the following influenced your decision to engage with, or purchase products from, a brand in the current environment?



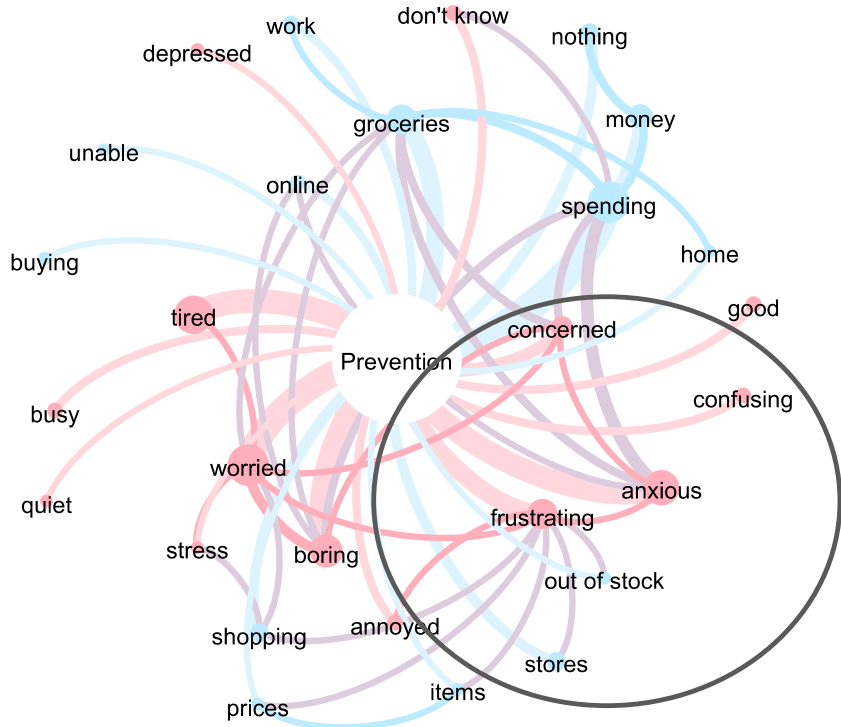
People's Regulatory Focus Impacts Strategies to Stay “Safe”

Across the board we're seeing new behaviors emerge, **but we see differences in the match between mindset and behaviors to get through the pandemic.**

For the Prevention Mindset, People are **Anxious to Stay Prepared**

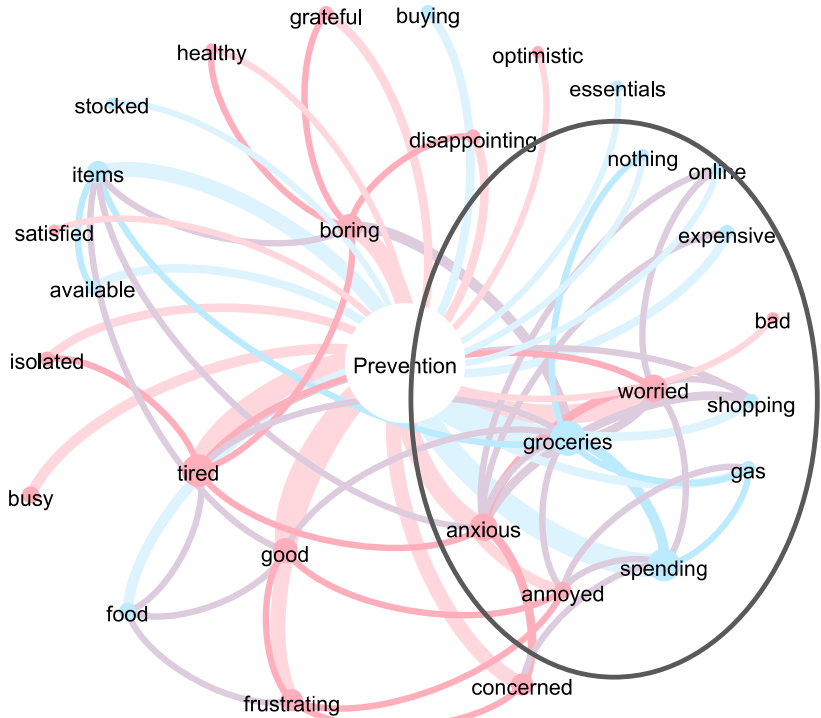
Mid-March

Panic Shopping and Frustration About Out of Stock



Mid-April

Spending More on Groceries and Using Online



Ipsos Fresh Lab Community (Base: 64)

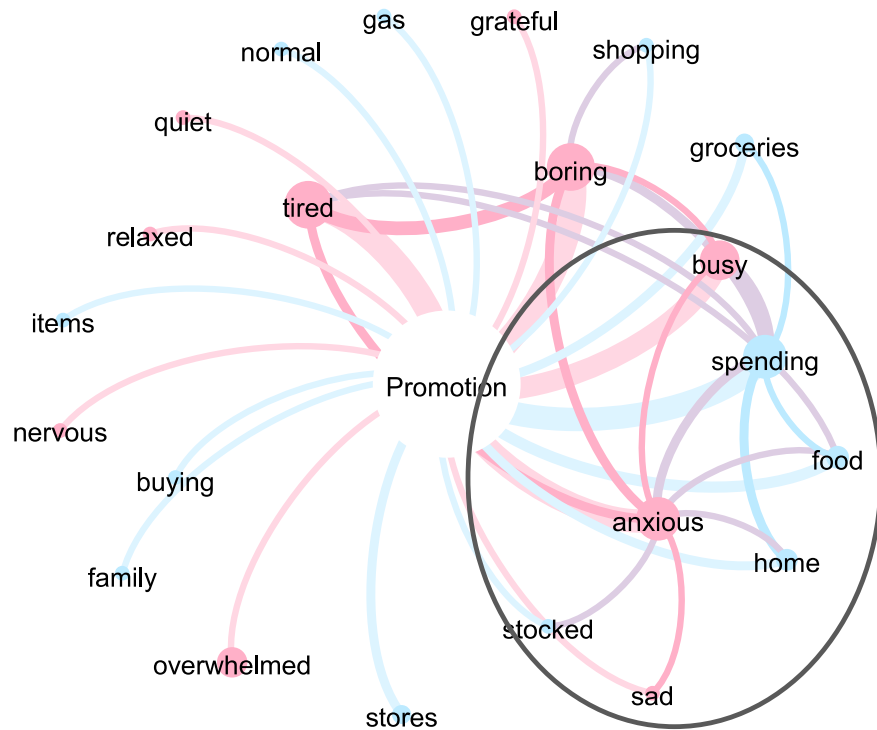
- Emotion
- Behavior



For the Promotion Mindset, People are **Anxious to Maintain Normalcy**

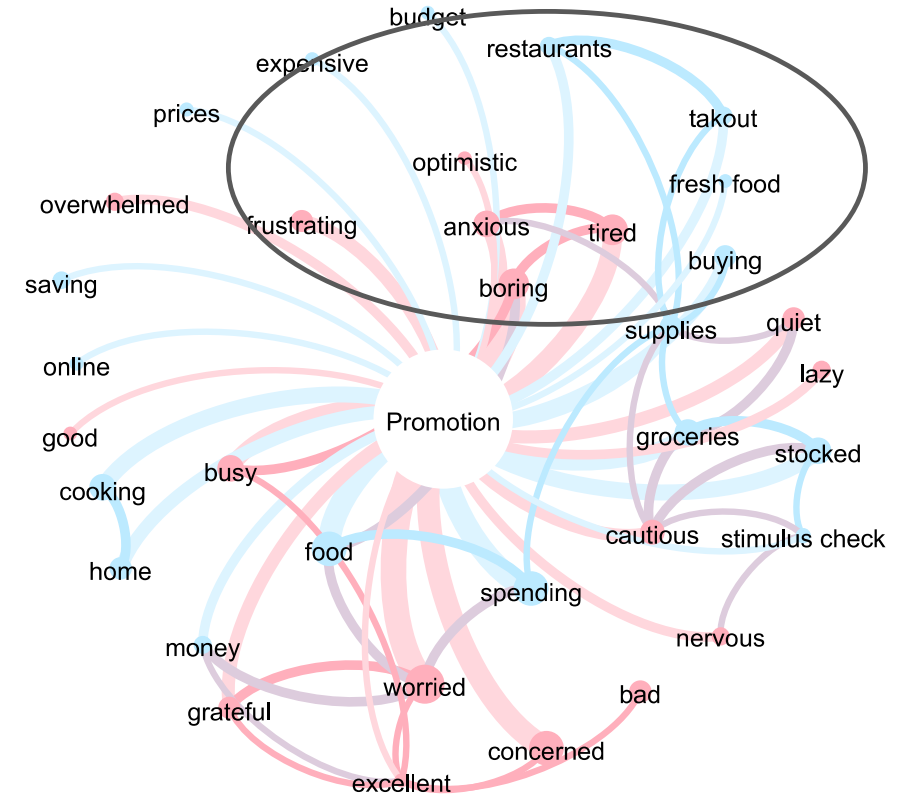
Mid-March

Worried about the Unknown of Staying at Home



Mid-April

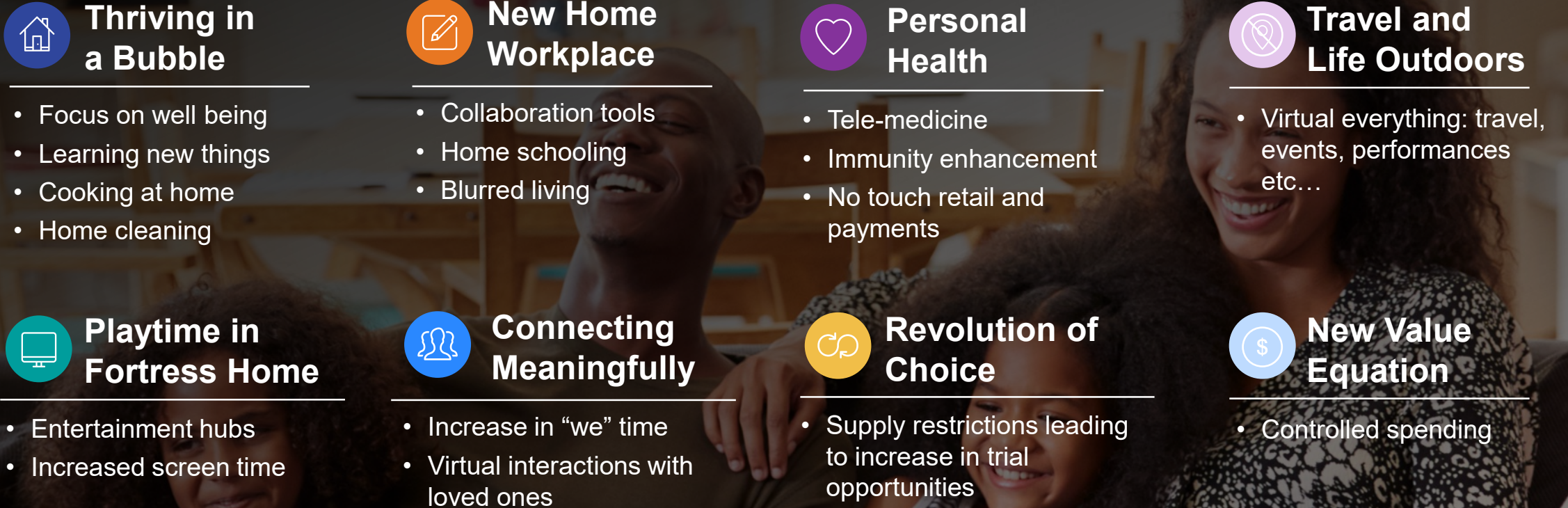








Fatigue and Boredom, Anxious for Thrills



Ipsos Fresh Lab Community (Base: 64)

● Emotion
● Behavior

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

More people using video chat... to avoid isolation

35%

say they have video chatted with family and friends more often than normal over the past week. In March, 20% said the same.

“

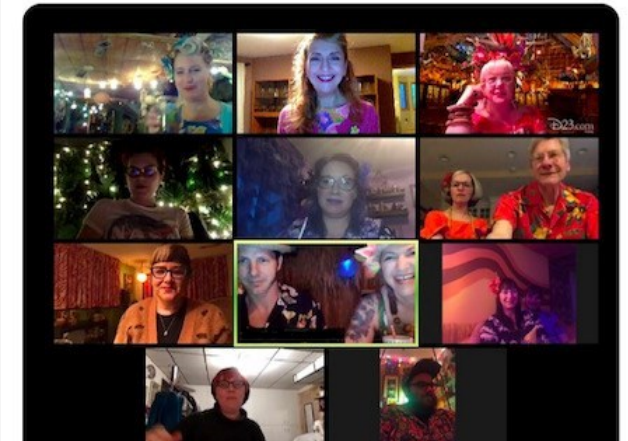
This morning I downloaded software all by myself to host a virtual happy hour with friends.

I feel proud that I can figure some small tech things out on my own.....maybe... I hope to never fall into the trap of technology passing me by and will always try to embrace new things.



KastleWaserman
@KastleWaserman

Thank you [@zoom_us](#) for keeping us all connected during these isolated times. I attended two parties with my friends this weekend, which helped us talk through our troubles and have some laughs. Keep up the great work!



More people using video streaming... to find comfort and safety

58%

Report they have watched streaming platforms more than a month ago, compared to 30% in March

“

I finally started using web streaming services. It has been lots of fun and nostalgic watching old TV shows and movies. I would highly recommend!

“

I am watching reruns of I LOVE LUCY today, tomorrow it will be something else **old and familiar**, too. I recommend that everyone watch things that help them feel happy, calm and cool.

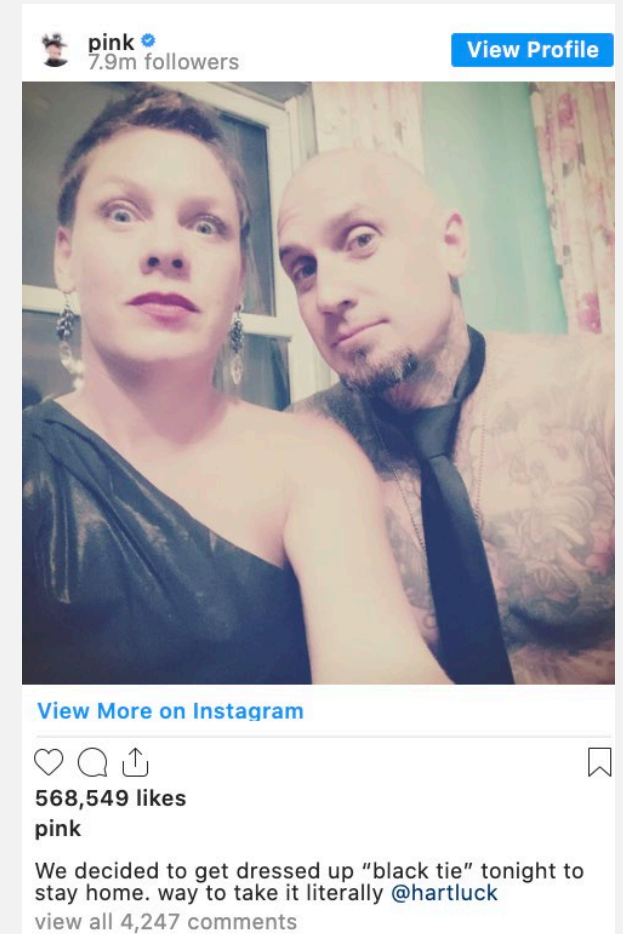
More people using takeout apps... to seek out a thrill at home

32%

say they are doing more home delivery from restaurants as a result of the crisis.

“

I will spend more on great food and wine to have at home since it's **my only thrill**.



More people cooking from scratch at home... to feel a sense of accomplishment

52%

Are cooking from scratch more and 38% of them expect to continue those new cooking routines.


“

I baked cheesecake from scratch as a treat for my family and **felt accomplished** and happy that I can give them something that lifts their spirits



Implications for Brands





Categories that never had to approach communications or product development from a prevention mindset are having to do so today, and this means a total rethink of their approach.

Fashion and Apparel



Travel and Hospitality



Airbnb is rolling out new optional "cleaning protocols" for rental property hosts amid the **COVID-19** pandemic.

Entertainment



Don't Forget the Human in Your Efforts...

01.

Data points are only part of the story, understanding the **context is key**

02.

Pre COVID-19 data, especially social conversation, can be used to **understand shifts** and remind of us the impact of those shifts

03.

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

**BE
SURE.
MOVE
FASTER.**

GAME CHANGERS



**THANK
YOU**

GAME CHANGERS

