

SIGNALS

Understanding the
coronavirus crisis

Fifth Edition

May 2020

INTRODUCTION – SIGNALS EDITION #5

The defining event of 2020 is the spread of the coronavirus (COVID-19) across the world. Things have moved quickly: the progression from outbreak to pandemic, the imposition of lockdowns around the world and, now, the tentative easing of restrictions.

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 fifth 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 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

Views on government responses to the outbreak

Our latest 15-country opinion tracker finds that ratings of how well governments are containing the coronavirus pandemic have fallen in some of the worst-hit countries.

KEEPING THE SHOW ON THE ROAD

Audience measurement in times of crisis

We examine how audience measurement must continue and adapt in times of crisis so that we can understand the rapid changes happening and be better equipped for any future disruptions.

THE FORCES OF CUSTOMER EXPERIENCE

The science of strong relationships

Our new paper introduces 'The Forces of CX', a human-centric framework that helps organisations drive stronger relationships through a better understanding of customers' functional and relational needs.

IMPACT OF COVID-19 ON HOW WE EAT

An analysis of online conversations

Using social listening data, we explore some of the key themes emerging in online conversations around food, including how eating habits are changing and how brands can respond.

BUILDING BLOCKS OF CORPORATE TRUST

Delivering positive reputational impact

How a company responds to the coronavirus pandemic will likely have a big impact on their reputation. This new research explores why delivering on basic needs will help to yield long-term goodwill from consumers.

SPOTLIGHT ON FRANCE

Coronavirus impact on France and its people

The lockdown period has been stressful for French people, with most saying they have been anxious recently. Some 63% feel ready to be released from quarantine, but only one in four feels "perfectly ready" for what comes next.

SPOTLIGHT ON CANADA

Two in three Canadians are watching more news

As Canadians' news consumption increases while the coronavirus outbreak continues to unfold, a new study finds those who consume news on a more regular basis have greater trust in news coverage.

SPOTLIGHT ON SPAIN

Reactions from the public as lockdown lifts

Looking more closely at people's experiences of the crisis in Spain, our analysis finds a sense of solidarity, responsibility and unity, as well as a characteristic duality between optimism and pessimism.

PUBLIC OPINION AND CORONAVIRUS

The latest wave in our series explores views on government responses to the coronavirus outbreak.

Ratings of government performance in containing the coronavirus pandemic have fallen in some of the worst-hit countries, according to the latest Ipsos coronavirus tracker survey.

In nine out of 13 countries covered, we find a majority saying their government is doing a good job of containing the spread of coronavirus. People in India (87%), Australia (84%), Canada (81%), Germany (75%), and Italy (61%) are most likely to give their government a positive score. In contrast, 62% in Japan are critical, as are 60% in Spain, and 51% in France. Public opinion on this topic is dynamic, with a number of marked shifts in ratings over the last month.

Meanwhile, coronavirus dominates our global [What Worries the World survey](#). As the “new entrant” in the questionnaire, COVID-19 overtakes all other issues and registers the highest level of concern seen for any category since the series began a decade ago. It ranks as the top worry in 24 of the 28 countries surveyed.

When asked about the most important issues facing their country today, 61% of respondents across all countries cite coronavirus, with the highest scores seen in Malaysia (85%), Great Britain (77%), and Australia (74%).

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KEEPING THE SHOW ON THE ROAD

Audience measurement must continue - and adapt - in times of crisis to prepare for the “new normal”.

Within the Audience Measurement world, there is a critical need for stability and reliability, so any changes must be managed carefully. However, the coronavirus crisis has suddenly forced change in the following ways:

- Face-to-face interviewing is now almost impossible.
- Enforced isolation at home has dramatically changed media audiences.
- New competitive pressures have emerged.

This is not a time to stop measuring. Instead, we should focus on investigating alternative, virus-resistant methods that will allow us to offer insights into changing media audiences.

New technologies can replace or complement survey data across different media and platforms. Respondent-free options allowing the passive measurement of people and vehicles will be useful for seeing how travel recovers post-lockdown. And data science offers ways to build on data and get better audience estimates.

Our paper argues that audience measurement must continue and adapt in times of crisis so that we can understand the rapid changes happening and be better equipped for future disruptions.

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THE FORCES OF CUSTOMER EXPERIENCE

The science of strong relationships.

The importance of customer experience (CX) as a driver of financial performance is widely acknowledged. Customers' decisions about brands directly impact the bottom line. Customer retention, advocacy and share of spend are crucial customer outcomes that organisations need to drive to generate revenue growth.

In this new paper from Ipsos' Customer Experience team, we introduce 'The Forces of CX' – a human-centric framework that helps organisations drive stronger relationships through a better understanding of customers' functional and relational needs.

Building on R&D conducted over the last 12 months and spanning nine sectors, the framework captures the true building blocks of relationship strength, allowing organisations to take their CX strategy to the next level.

Through our analysis, we were able to identify key dimensions which we then validated to be strong predictors of emotional attachment and relationship strength – dimensions which have particular relevance to the COVID-19 crisis. Focusing on them will allow brands to re-focus customer experience measurement and management to address what truly matters.

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IMPACT OF COVID-19 ON HOW WE EAT

Using social listening data, we explore key themes emerging in online conversations around food.

As the coronavirus pandemic has progressed, the way people think about food has changed. When there was less certainty, we saw consumers respond accordingly – looking for food immunity boosters and panic buying “essentials”.

As time has gone on, a new normal has come about with more snacking (heightening the ‘clean eating’ vs. indulgence trends) and using food as a connection point with life (‘how it used to be’). Most recently, we’ve seen the rise of the home chef, as there are fewer other options for things to do and people take the plunge with more and more challenging recipes.

Using social listening data, we have been monitoring online conversations about the COVID-19 pandemic. When we look at English-language posts globally, we see that individuals have gone through a series of phases, which reflect an evolution of their attitudes and behaviours.

Applying a category lens to these phases such as ‘food’ and ‘eating’ allows us to explore how category conversations and behaviours have changed and how brands can respond to these changes.

In this article, we highlight the key themes we have found from our analysis.

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BUILDING BLOCKS OF CORPORATE TRUST

How a company responds to the coronavirus pandemic can have a big impact on their reputation.

Our latest data shows an expectation during the crisis for companies to be focused on the safety of employees and customers, protecting employee jobs, and providing adequate healthcare.

This new research from the US finds that people see grocery stores, restaurants and food companies as having a clear role to play in tackling the coronavirus – a sentiment which has become clearer as the crisis has progressed.

For companies at the frontline who are experiencing rising expectations about their role in combatting the spread of coronavirus, the principles of crisis management communications will always apply:

- Understand your company's risk profile and how your organisation contributes to the broader public health and information-sharing platforms.
- Open and consistent communication is crucial – smart companies will proactively communicate with all stakeholders, both internally and externally.
- Know what expectations are to stay informed as the situation continues to evolve on the ground as well as in public perceptions.

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SPOTLIGHT ON FRANCE

Ipsos' coronavirus research in France paints a vivid picture of its impact on the country and its people.

The latest wave of the [Datacovid](#) programme finds COVID-19 to be the overwhelming concern for all age groups, with 88% judging the current situation as "serious". One in ten say someone close to them has been hospitalised or died as a result of the disease.

People are clear about the strains of life under lockdown. Some 55% report experiencing anxiety in the past two weeks and 24% say they've been through a full range of emotions – 'anxiety', 'apathy', 'loss of control' and 'sorrow'.

Meanwhile, [Ipsos/Sopria Steria](#) research finds President Macron and his team under the spotlight. With 38% satisfied and 62% dissatisfied with their government's response to the crisis, the French satisfaction scores are the lowest of seven countries measured.

Despite criticisms of their government's overall performance, majorities support the actions taken, such as school closures and strict border controls.

With restrictions set to be eased over the coming weeks, the French are preparing for their new life after lockdown: 63% feel ready to be released from quarantine, but only 1 in 4 feels "perfectly ready" at this stage. In terms of practical steps, some 52% report using hand sanitiser, while a quarter have been wearing a mask while out of the home.

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SPOTLIGHT ON CANADA

Canadians are increasing their news consumption to stay up-to-date with the coronavirus situation.

Two in three (64%) Canadians say they are consuming more news than before the crisis – a proportion that rises among women and the older generation. As news consumption levels rise, [a new study](#) for Global News finds those who consume news on a more regular basis have greater trust in the coverage.

Among Canadians as a whole, a majority (57%) say they can trust what they are seeing on the news about the COVID-19 outbreak.

As signs emerge that Canada's curve is heading in the right direction, Canadians stand with their municipal governments in the fight against COVID-19. More than eight in ten Canadians (85%) approve of their municipal government's response to COVID-19.

Meanwhile, this article on [Generation Z and Covid-19](#) in Canada explores how the group are using their status as digital natives to navigate the pandemic.

Data from a recent study in Canada finds Gen Z showing some of the lowest levels of concern regarding day-to-day life during the crisis. This reflects a generation who are more likely than any other to already be using online tools to stay close to friends and family and using apps to order their food – behaviours allowing them to adapt a little more easily to the “new normal”.

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SPOTLIGHT ON SPAIN

We look back at Spain's experience of COVID-19 and reactions from the public as the lockdown lifts.

The coronavirus pandemic has touched all countries around the world, but it has not affected them all equally. Looking more closely at the experience in Spain, we find a sense of solidarity, responsibility and unity, as well as a characteristic duality between optimism and pessimism. [Watch the presentation.](#)

Spanish people have shown discipline during the lockdown with 95% reporting compliance with the confinement and a wide adoption of protective measures. But, having suffered the economic crisis of 2008 more deeply than other countries, the Spanish are most pessimistic about a rapid recovery – only two in ten believe this is possible. Meanwhile, Spain has remained highly critical of its government's management of the crisis.

After seven weeks of strict lockdown, early May saw the start of a phased easing of restrictions across Spain. Going into this first stage, our [online community](#) display notable increases in feelings of relief that life was returning to normal, but also fear about the economic consequences. A majority (59%) say that they understand the government's plan to exit lockdown and two in three (66%) agree with it.

At the same time, Spanish people are cautious. Many have reservations about possible spikes in infections, and are worried that people will not follow the rules and things will get out of control.

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SHORTCUTS

RESPONDING TO COVID-19 IN AFRICA

Ipsos has conducted research across 20 African countries with the Partnership for Evidence-based Response to COVID-19 (PERC) to understand public reactions to the pandemic and the Public Health Social Measures (PHSM) implemented.

African countries responded quickly to COVID-19 with measures including curfews, lockdowns, training in laboratory diagnostics and surveillance. These early policies helped curb the rapid spread of infection across the continent. It is now important to find a balance between reducing transmission and preventing social and economic disruption.

- One third (32%) of respondents say they do not have enough information about coronavirus.
- 62% overall believe COVID-19 will have a major impact on their country, but only 44% believe it is a threat to them personally.
- 69% say food and water would be a problem if they had to remain at home for 14 days and 51% would run out of money.

The [overview report](#) details the key research findings across the 20 countries. [Summary reports](#) are also available for each member state.

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UPDATES FROM THE COUNTRIES

Almost half of Australians with a smartphone (45%) are likely to download a government contact tracing app to aid the tracking of virus transmission, our [new survey](#) reveals. The same research in New Zealand found almost two-thirds of Kiwis with a smartphone (62%) said they were likely to download such an app.

Privacy concerns are the main reasons given by people in both countries for being reluctant or unwilling to download such an app.

Meanwhile, in Italy, our [latest opinion polling](#) shows Italians feel conflict between the need to re-start activities as soon as possible and the need for caution as the country begins easing lockdown restrictions.

Moving to the UK, this [thought piece](#) discusses how kids and parents are engaging with voice technology in the home, and what opportunities this presents for brands both during and post lockdown.

Meanwhile, [this article](#) from Ipsos in India looks at the country's most vulnerable groups, including the elderly, and explores how they have been impacted by lockdown and social distancing.

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SOCIAL DISTANCING IN THE US

Social interaction in the US is climbing slightly after a six week pause, with Americans reporting increased visits with friends and family as the desire for company frays social distancing, according to the latest [Axios-Ipsos Coronavirus Index](#).

Meanwhile, with new cases of the virus levelling off, jobs and the economy have risen to be the most important political issue to people in the US., overtaking healthcare and immigration, according to a [new poll](#). With more than 30 million current jobless claims in the US, it seems unlikely this agenda will change before the presidential election in November.

Meanwhile, as debate rages over when to re-open the economy, a strong majority of Americans say they would be unlikely to resume activities where big groups are present, even if coronavirus-related restrictions were lifted tomorrow, according to an [ABC News/Ipsos poll](#).

Partisanship appears to be a real factor here, with Republicans more likely than Democrats to resume activities they did pre-crisis.

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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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