

Planning for the next
stages of covid 19



Go to www.menti.com and use the code 62 31 71

What is the first thing you will do when all this is over? Put down one word - an activity, a name, a person, a brand...



What's Next?



How we should be:

Patient – the crisis is going to be long

Focused – on a few good ideas that are clear and simple

Curious – about the world and how it is changing



Maintain:

- Vision
- Mission
- Purpose

New routines are being set, we are learning a new way of being



Colin Strong
Global Head
Ipsos Behavioral
Science Center

*“If brands want to be part of people’s lives when we come out the other side, they really need to **be on the journey** with them. What are the psychological dimensions that are shaping their behavior at that point in time.”*



**We are witnessing
a new reality -
But what will stay
and what will go?**



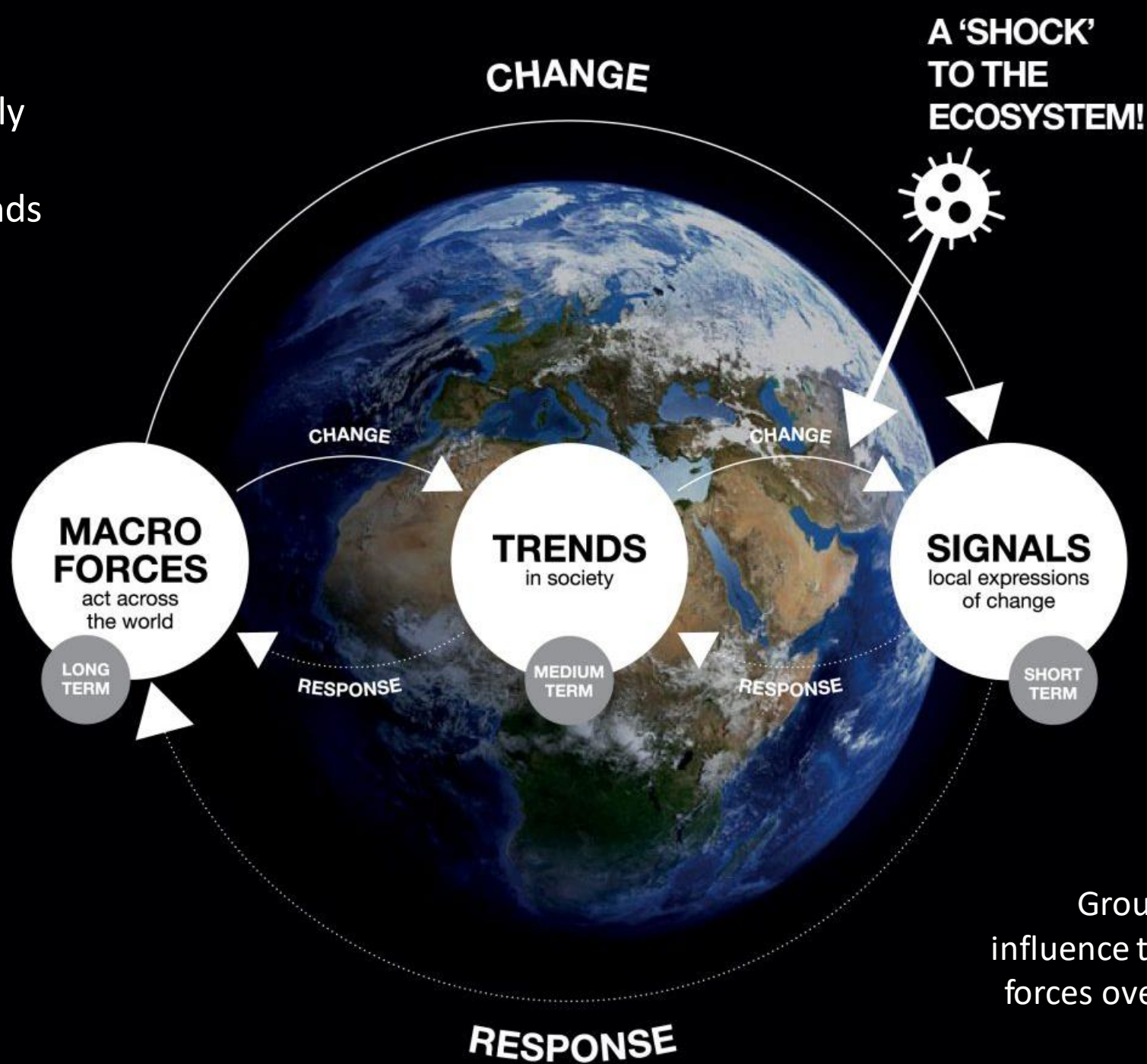


What is going to happen now?

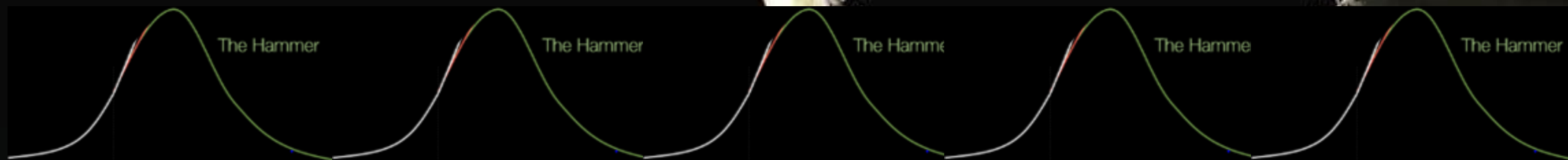
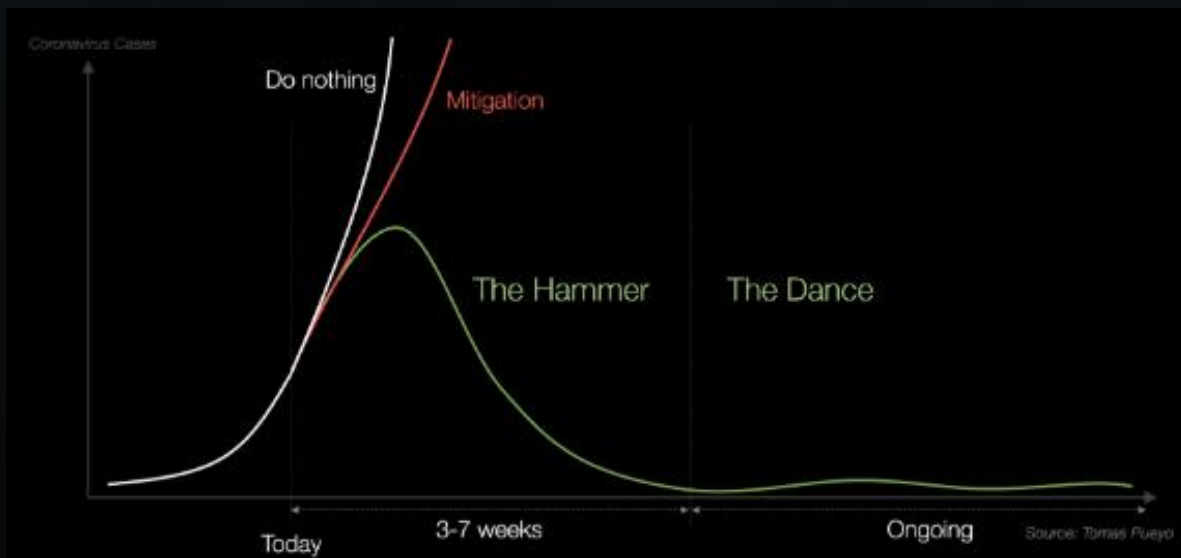
how do we know
the changes we experienced are
**SHORT VS.
LONG TERM
BEHAVIOUR**



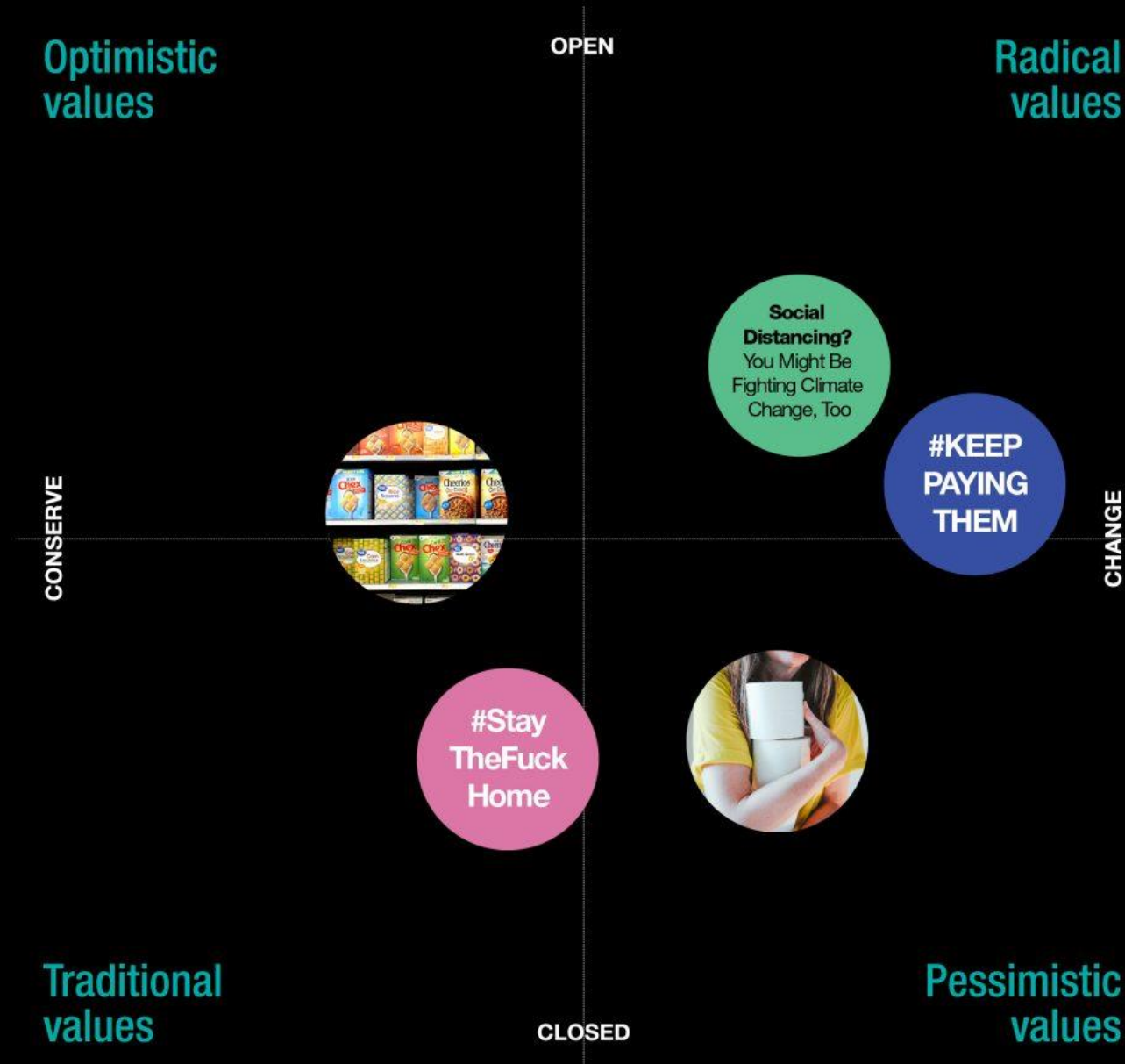
Macro forces usually impact slowly on human beliefs, trends and signals



Groups of signals gradually influence trends and even macro forces over a longer time frame.



When shocks occur, people look for ways to reinforce what they already think, or that they want to believe to be true – confirmation bias



We can map, and bring to life, signals on a values framework



**This is where
EMPATHY
can help.**

In this time of crisis, brands are exploring every possible means to remain helpful and relevant to their customers, and making **EMPATHY a key part of their decision-making process is a wise approach.**

Bob Liodice, CEO at ANA (Association National Advertiser - US)





What is EMPATHY?



To Add or Create Value for the People you Serve

But not all empathy is equal – Its problem solving at the **Heart**

TO COGNITIVE
EMPATHY

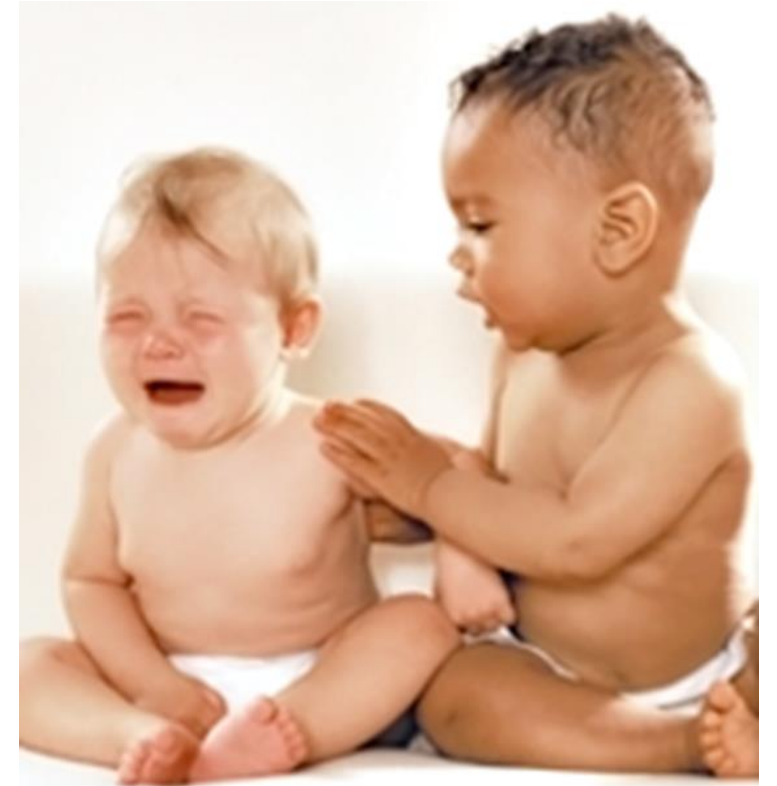


"I feel your pain, I understand, I can now do something"

"I feel your pain and I understand you better"

"I feel your pain"

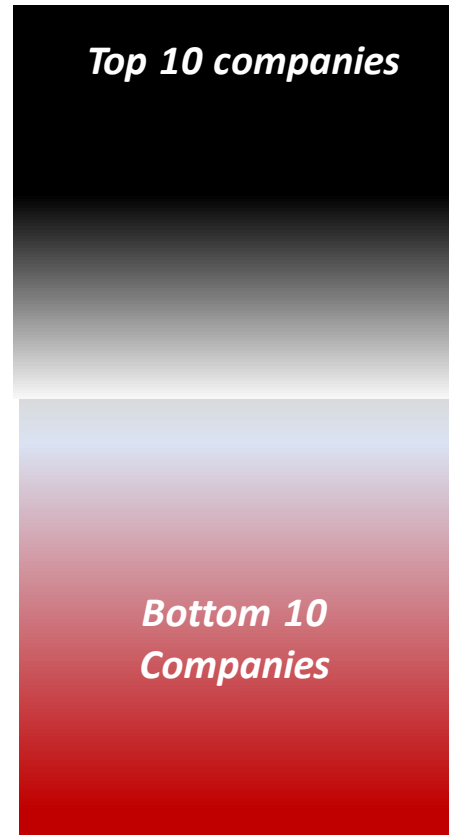
FROM EMOTIONAL
EMPATHY



Return on Empathy! – The Empathy Index

Global Empathy Index

- Ethics
- Leadership
- Brand perception
- Public messaging
- Social media
- Diversity



+2X

Value Increase

+6%

Average Earnings



There is a direct link between empathy and commercial success. Businesses are more profitable and productive when they act ethically, treat their staff well, and communicate better with their customers, according to the latest Global Empathy Index.

-9%

Average Earnings



*HBR November 27, 2016
The Most (and Least) Empathetic Companies
Belinda Parmar



People will try to convince
you that you should keep
empathy out of your career.
Don't accept this false
premise.*

Tim Cook, CEO Apple



Tim  
@tim_cook

In a recent survey of 150 CEOs

80%

recognized **empathy** as key to
success.

ROE – Return on Empathy

The financial performance of a company is tied to empathy

87%

CEO's Agree

Employees agree

%

More likely to stay with an organization that empathized with their needs.

95%

Willing to work longer hours for empathetic employers

81%

Willing to take a pay cut to work for an empathetic company.

60%

*Businessolver – State of Workplace Empathy Study

92

% CEOs that believe their organizations are empathetic.



50

% Employees report having empathetic CEOs

People are going through changes



Disbelief

Preparation

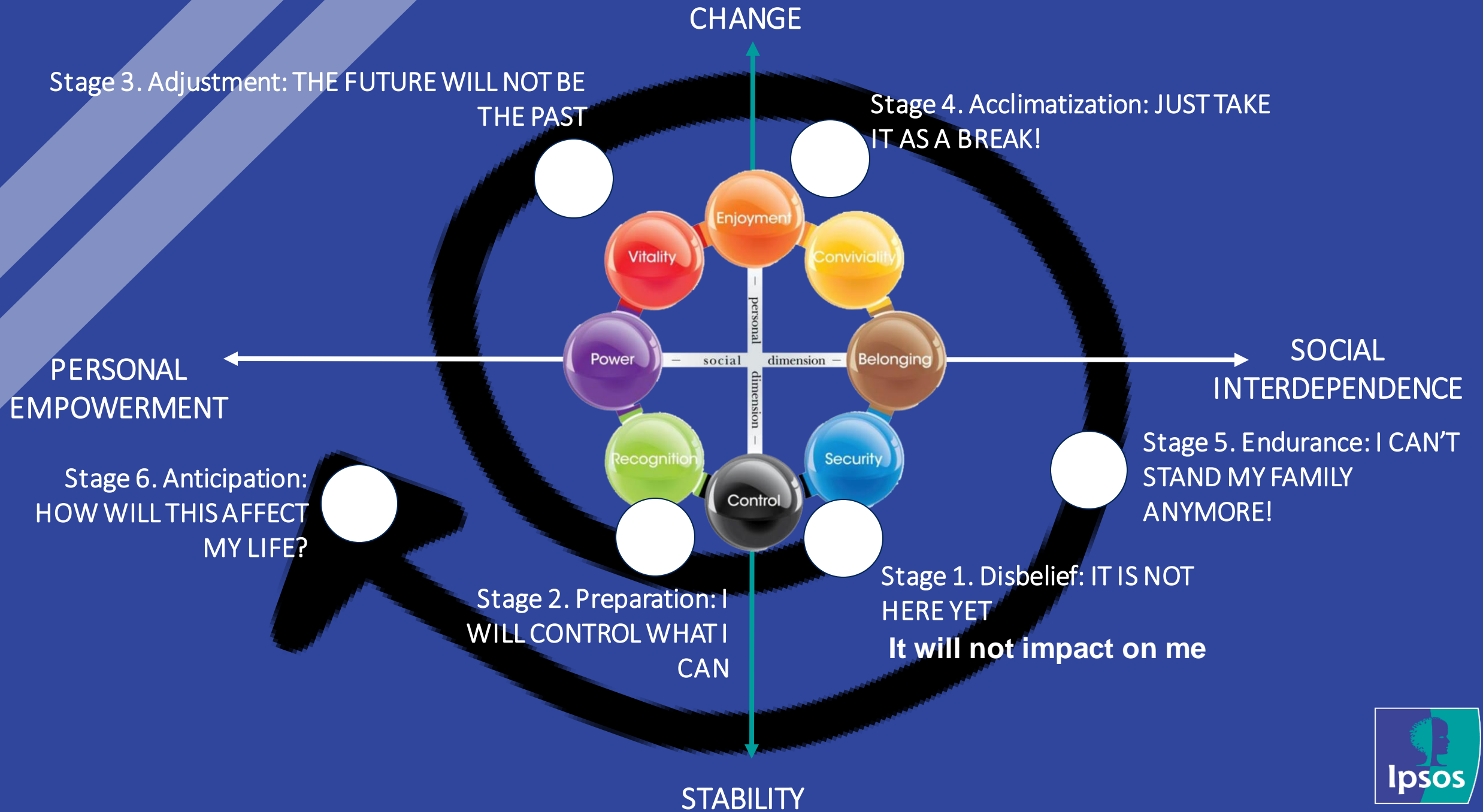
Adjustment

Acclimatization

Endurance

Anticipation, Trepidation





What have we observed in each stage?

4. Acclimatization



“I am actually having the time of my life. We have put a vegetable garden on the balcony and I really enjoy it, I love the newfound quietness in this city.”

– Germany



I am learning more things about my son **watching him play** than I ever known before.



What have we observed in each stage?

5. Endurance



“I know I am insanely privileged, but sometimes I just need a bit of space from all that. I take full offline days now.”

– United Kingdom



More time to [reflect](#).



The Ipsos Empathy Program

Empathy Focus = Organizational Change

Inciting the shift has happened for us / to us.
It is time to connect in every way possible. .



Initiate - Incite the Shift

1. **Excite** the team – Kick off the movement
2. **Engage** them - hands on training summit.



Connect - In-context Experience

1. **Experience**, form a connection.
2. **Observe** and capture real moments.
3. **Listen Deeply** in the moment.



Act - Create Value

1. **Share** knowledge and experience
2. **Transform** empathy to action



THREE PHASES TO THE CORONAVIRUS

1

Phase 1: Survival

Where we are now = the CV-19 crisis and related disruption

Ends when lock-down is over

2

Phase 2: Adaptation

Restrictions are relaxed

Will last 6 – 24 months

Ends with no restrictions, a vaccine. But still risk of mutation of virus

3

Phase 3: Evolution

Recovery

The Next Normal

The 'day after' is not going to be the same for everyone



Thinking about the so called '**PHASE 2**', when the virus will still be among us but we will be able to get out, what do you expect?

WORRIES & WORRIES



We will avoid taking public transports, as well as cinemas, and bars in more crowded moments. We will do shopping more quickly, limiting our stays in malls... (35-50 y.o.)

I will go out with the mask for months, if not forever: such a shock will carve in the mind for a long time... (35-45 y.o.)

Who knows if others' houses will be safe places anymore... where shall we meet again with friends? (55-65 y.o.)



Thinking about the so called '**PHASE 2**', when the virus will still be among us but we will be able to get out, what do you expect?

WILLINGNESS TO FORGET



At the end we will forget everything and we will come back as before: we are a specie made to forget 😊 (18-30 y.o.)

I'm sure the vaccine will be developed, and our life will be beautiful again as before (35-50 y.o.)



Thinking about the so called '**PHASE 2**', when the virus will still be among us but we will be able to get out, what do you expect?

DESIRE FOR NORMALITY



I'll try to go back to normal as fast as possible, but wearing a mask... which will become the new «must to have» fashion gadget for 2020/2021 😊 (18-30 y.o.)

We'll get back progressively to our old habits... at least just a little changed... (55-65 y.o.)

I'd love in Phase 2 we could go back to our usual occupations, to make our normal a little «more normal» (35-50 y.o.)

We will need to develop and explore hypotheses for each client, category and country based on people's evolving value-based needs and motivations

Will family matter more now many families are closer together?

Which habits will snap back immediately e.g. travel, eating out?

Will people enjoy not having stuff?

Will we need offices ?

Which habits will snap back immediately e.g. travel, eating out?

Will mindfulness become mainstream?

Will climate change become more real?

Will snacking be demonized?

Some questions to ask when assessing potential for continued growth post crisis

- What were the circumstances that prompted its growth?
- Does this product/service capitalize on a preexisting market trend?
- Is this product service a break though or unique offer whose time was right?
- How much positive feedback did it receive? How did it perform under these new circumstances?
- Have consumers had enough time to habitulise this product/service?
- Once conditions return to normal, is the benefit of this product/service still relevant in daily life?

NEED/ BENEFIT

ACCELERATION

INNOVATION

IMPACT

*Immediate causes
and impact*

EMBEDDEDNESS

*Long-term changes
and usage*

ONGOING RELEVANCE

What's happening during lockdown time?

In all countries more than half of time is spent on entertainment and hobbies.

WAYS CONSUMERS TREAT THEMSELVES WHILE SOCIAL DISTANCING
Share of discussion broken out via AI text analytics processing: (n=806)

China



■ entertainment

US



■ hobbies

■ family time

■ self care

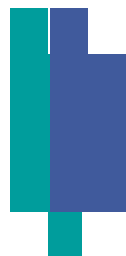
ITALY



■ housework

What do you prefer doing?

- Watch movies/ TV series / programmes/ videogames 34
- Practise hobbies 26
- Chat with friends or relatives through Social Media 6
- Physical exercise 6
- Put in order old things 6
- Read old books 6
- Try new recipes 3
- Follow online courses 3
- Self care 3
- Follow the news 3
- Shop online 2
- Chat 2



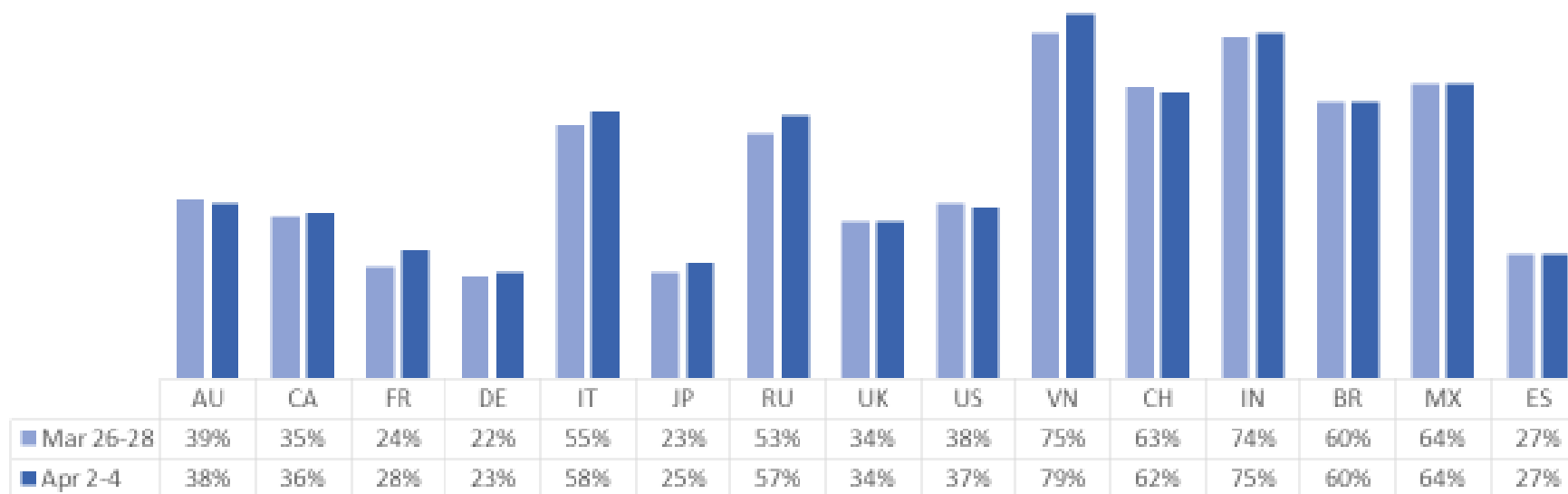
We are learning new skills.

Likely: will learn a new skill

I will learn a new skill

% Very + Somewhat Likely

■ Mar 26-28 ■ Apr 2-4



How likely or unlikely do you think each of the following are to occur as a result of the Coronavirus or COVID-19?

We are experiencing new shopping mode

Forced by the difficult supermarket context, new shopping modes sometimes reveal unexpected functional and emotional benefits



I won't do shopping weekly anymore, I see with a good planning allows me to do it every two weeks... we are now used to it! 😊 (18-30 y.o.)

A good planning saves a lot of time.. And now I'm used to be «cuddled» by the greengrocer who delivers at home all that I want weekly... I will continue like this also after this (35-50 y.o.)



Shifting baseline syndrome



Signals

Burger King France advertises recipe for making a Whopper at home



Signals

Technology is 'winning' during the COVID-19 pandemic



Signals

WhatsApp imposes new limit on forwarding to fight false Covid-19 claims



Signals

Independent Shops and Producers are now delivering In London



Signals

Zoom introduces new virtual background feature



Signals

Heinz opens first UK online shop to help feed the nation – selling beans, hoops and soups

There are many categories that have seen growth throughout the crisis. But Online and Livestreaming services proliferate

Boredom is a battle, and with immediate functional needs satisfied, the war is won by activities and engagement



Exercise/Fitness

- Live streamed exercise classes/programmes
- Online gym
- Active games



Education

- School curriculum – home schooling, homework
- Self improvement – online courses or skills
- Distance learning modules/Online tutorials
- Hobbies – cooking, etc



Entertainment/Gaming

- Livestreaming music/clubs/events
- DJ livestreaming
- Increased gaming



Experiences

- Travel by proxy
- Cultural sights/commentary

Some obvious categories showing growth include:

Hygiene and Healthcare, Nutrition and Skincare and Personal Care. And interest in Auto purchase has grown significantly as a response to reduced trust/health safety in crowded public transport.

Hygiene and Healthcare

Increased use of:

- Household cleaning
- Protective – masks, gloves, etc.
- Sterilising - Antibacterial/antiviral – home and portable.
- Kits – all in one household kits

Potential Opportunities

- Healthcare advice – online diagnostic services
- Remote health/medical consultations
- Delivery medications – OTC or Rx
- Delivery prescriptions – encoded/security
- UV light sterilization devices – clothing/soft furnishings

Nutrition

Increased use of:

- Dairy Products: wholesome, believed immunity benefits. And UHT/ambient temp milk is easy to store and long lasting.
- Long life products: rice/pasta/beans, etc.
- Coffee/milk teas – make at home rather than consume out
- Health supplements – especially those with immunity benefits

Potential Opportunities

- Ongoing penetration of dairy/immunity message
- Home cooking support - Recipes, online cooking/baking guides, ingredients, etc.
- Immunity boosting supplements

Skincare and Personal Care

Increased use of:

- While cosmetics use decreases when people stay at home, skincare and personal care can show growth
- Increased use of home hair conditioning and colouring products
- Skin care focus, even when cosmetic use has dropped

Potential Opportunities

- Professional standard home products
- Online hair colour matching or problem diagnosis
- Online hair and skincare tutorials
- Product trial activities

Will the category and service growth areas we have seen in crisis, continue to remain strong post crisis?

In China we see two very relevant tensions that help us understand the likelihood of longer-term change

X

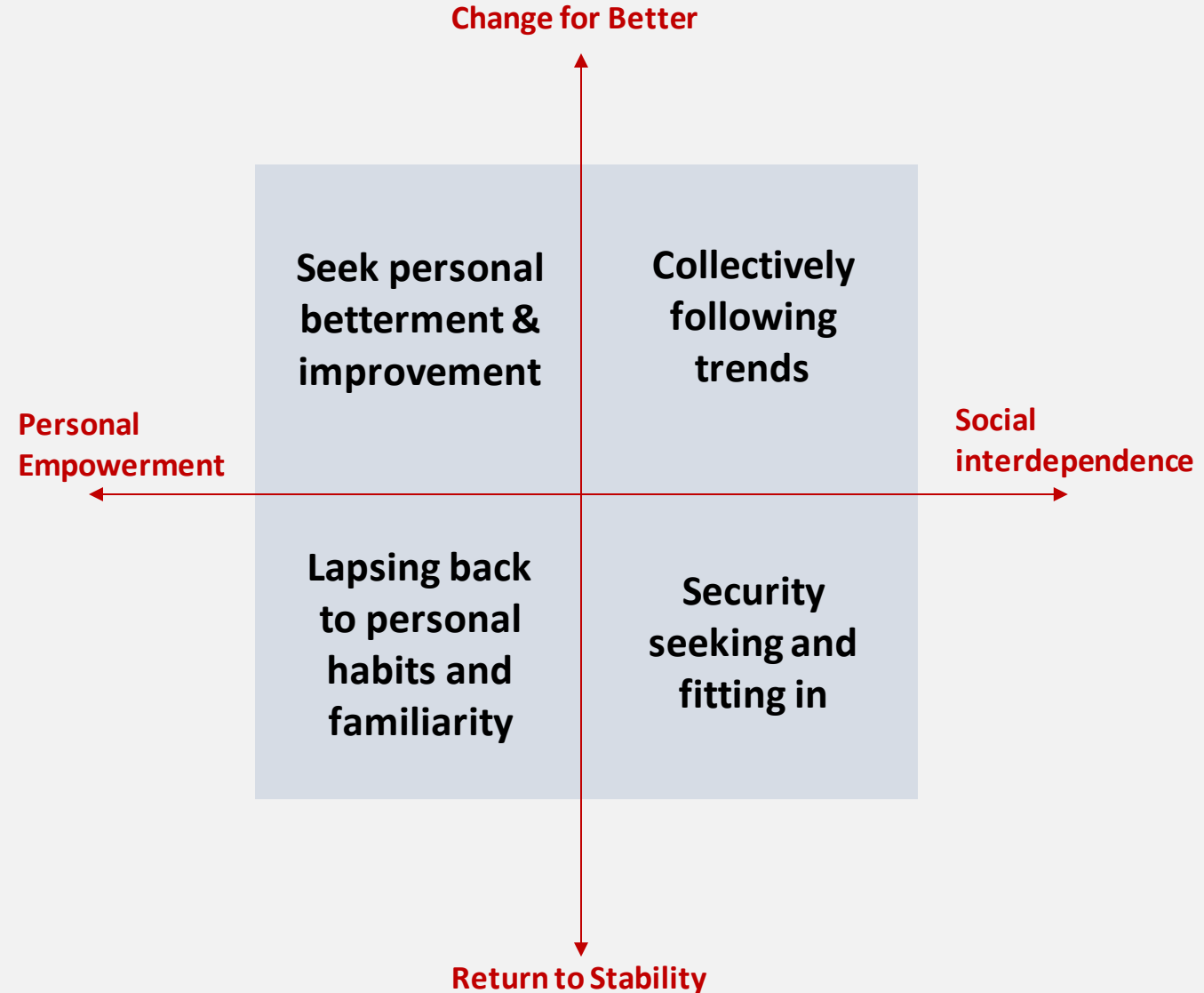
Axis

We see individuals' inclination towards **Personal Empowerment** vs **Social Interdependence**. These can be influenced by their generational, societal and cultural beliefs.

Y

Axis

We see the tension between **Seeking Change** vs **Seeking Stability**



WHAT IS THE **TWIST
GOING TO BE NOW?**

**Less of the HOW and more
of the WHY and WHAT.**

Principles still stand.



Get used to hypothesis, implications and scenario planning



The challenges of social distancing for us, participants **and** clients.



= new facilities, methods of immersions, intimacy becomes premium...



Tech innovation will leap forward



= we need to fast track approval process or recruit privacy lite participants...



Digital connections will be normal for everyone



= we can reduce office space, more regular client contact, remote immersions become easier...

Three Phases To The Coronavirus

1

Phase 1

Ends when lock-down is over

2

Phase 2

Adjustment 6-24 months

3

Phase 3

Next normal

Empathy

Limited Online Immersive
Community
Online Workshopping
Curation / Cultural Transferability

Online/ Digital Immersive
Community
Online Workshopping

Immersive face to face
Online / Digital
Community
Workshopping –on and offline

Curation / Cultural Transferability



THANK YOU

